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Britain’s hospitality groups posted flat October sales after five months of growth

Bars led the pullback with a 3.1% sales drop, increasing the sector’s reliance on holiday spending

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Sales at Britain’s pub, bar and restaurant groups were flat in October, ending five straight months of like-for-like growth and leaving the sector more reliant on Christmas trading to lift year-end performance.

On Wednesday, Nov. 18, the NIQ RSM Hospitality Business Tracker said comparable sales at 122 managed hospitality groups were unchanged from October 2025. That marked a sharp slowdown from the 2.7% year-over-year increase recorded in September, according to the monthly survey by NielsenIQ and RSM.

The result matters for hospitality operators because it measures trading at existing sites, stripping out the effect of new openings. A flat reading suggests consumers pulled back on discretionary spending as the industry moved into a critical period for pubs, bars and restaurants, which often depend on November and December demand to support annual profits.

NIQ and RSM said cautious consumer behavior before Christmas weighed on the market. The tracker also pointed to storms as a factor that slowed trading during the month. The combination interrupted a modest recovery that had been building through late spring and summer.

Bars were the weakest part of the market in October. Like-for-like sales in that segment fell 3.1% from a year earlier, according to the tracker. The source material did not provide comparable October figures for pubs and restaurants in the information released with the report.

Even so, the broader picture was not entirely negative. Total sales across the 122 groups, including contributions from newly opened locations, rose 3.7% year over year in October. That indicates expansion is still helping larger operators increase revenue, even when existing venues are not generating growth.

For hospitality businesses, the gap between flat same-site sales and rising total sales highlights a familiar pressure. Operators can still show top-line growth through new sites, but weak trading at established venues makes it harder to absorb higher operating costs. The monitor summary accompanying the NIQ release said the October result increased the sector’s dependence on the Christmas season to offset those cost pressures.

The tracker’s October figures add to signs that consumers remain selective about eating and drinking out. After a better September, the abrupt loss of momentum suggests households are still managing spending carefully, especially as the holiday period approaches and other seasonal expenses rise.

Because the NIQ RSM tracker focuses on managed groups, it offers a snapshot of larger operators rather than the full hospitality market. Still, its monthly readings are widely watched across the sector as an indicator of demand trends, site expansion and the balance between consumer confidence and cost inflation. October’s flat performance leaves the industry entering its busiest stretch without the cushion of strong underlying growth.