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British hospitality chains posted flat October sales, ending five months of like-for-like growth

Bars fell 3.1% and food-to-go dropped 7.9%, outweighing modest gains at restaurants and pubs

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Sales at British restaurant, pub and bar chains lost momentum in October, ending a five-month run of growth on a comparable basis as weaker results in bars and takeout offset small gains in restaurants and pubs.

The NIQ RSM Hospitality Business Tracker showed that like-for-like sales in Great Britain were unchanged in October from the same month a year earlier, in nominal terms. That was a sharp slowdown from September, when comparable sales rose 2.7%.

NIQ said on Wednesday that the October reading covered 122 organized restaurant, pub, bar and food-to-go groups that report sales directly for the monthly survey. The figures compare outlets open in both periods, a measure that strips out the effect of site openings and closures.

The flat reading marked a clear break from the recent trend. Comparable sales had been rising since May, but the pace weakened materially in October. The shift suggests consumer spending in hospitality became more uneven as the autumn period progressed, even though total revenue across the sector still increased when new locations were included.

Restaurants posted the strongest result among the main formats, with like-for-like sales up 0.8% from October 2025. Pubs also stayed in positive territory, though only slightly, with a 0.4% increase. Those gains were outweighed by declines elsewhere. Bars recorded a 3.1% drop in comparable sales, while the food-to-go segment fell 7.9%.

Including revenue from newly opened sites, total sales across the 122 groups rose 3.7% year over year. That gap between flat comparable sales and higher total sales indicates expansion through new openings continued to support headline turnover even as existing locations stopped growing.

The tracker also showed a geographic split between London and the rest of Great Britain. Within the area inside the M25, comparable sales rose 0.7% in October. Outside the M25, they fell 0.3%. The difference points to slightly more resilient trading in and around the capital than in other parts of the country during the month.

The October figures are nominal, meaning they are not adjusted for inflation. Even so, the data provide a direct snapshot of how large hospitality operators traded at the start of the final quarter of the year, a period that is closely watched because it leads into the important holiday season.

The breakdown by segment highlights the different pressures facing operators. Restaurant and pub chains were able to keep sales slightly ahead of a year earlier, but bars and takeout businesses saw a more difficult month. The takeout decline was the steepest among the categories tracked, while bars were the only on-premise segment to post a meaningful fall.

The survey matters because it focuses on multi-site groups rather than the broader hospitality market, giving a view of how larger operators are performing across Britain. Those businesses often use new openings to keep overall sales moving higher even when mature sites are under pressure, and the October data fit that pattern.

For investors, suppliers and property owners, the figures suggest expansion remained a support for the sector, but demand at established venues was much softer than in September. A month earlier, comparable growth had been strong enough to suggest more stable momentum. By October, that momentum had faded.

The slowdown also underlined how uneven conditions have become across formats. Pubs and restaurants remained broadly stable, but neither delivered strong growth. Bars and food-to-go pulled the overall measure down, leaving the sector as a whole flat on a like-for-like basis.

NIQ published the data in a statement released on Wednesday as part of its monthly tracker with RSM. The report was based on sales directly submitted by the 122 groups in the sample and measured year-over-year change in October.