invincible.

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Won before the booking.

Destination fine dining in the 2026 season, the outlook for 2027, and the case for Meta, Google and stronger social.

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Invincible Digital · Edition 01

+4.1%

Forecast growth in UK fine dining turnover, 2026

UK restaurant market overall: +1.0%. Lumina Intelligence.

The top of the market is growing while the middle shrinks. This paper sets out who is behind that growth, how they choose a table, and what it takes to win the booking in 2027.

Contents

01	**Executive summary**	3
02	**A two-speed season**	4
	2.1 Trading in 2026	4
	2.2 Premium is pulling away	5
03	**The destination diner**	6
	3.1 Experiences ahead of things	6
	3.2 The international guest	7
04	**The shape of the year**	8
05	**How guests find you**	9
06	**The case for Meta**	10
07	**The case for Google**	11
08	**The case for stronger social**	12
09	**Proof, not proxies**	13
10	**The 2027 outlook**	14
	10.1 What the forecasters expect	14
	10.2 Three scenarios for 2027	15
11	**Why Invincible**	16
	11.1 What the evidence asks for	16
	11.2 How an engagement runs	17
12	**Method and references**	18

ABOUT THIS PAPER

A fifteen-minute read

Written for owners, managing directors and marketing leads at destination restaurants. Every figure carries a numbered source, listed from page 18. The 2027 view in chapter 10 is our own estimate and is labelled as one.

CHAPTER 01

Executive summary

Premium dining is still growing. The guests behind that growth choose where to eat on a screen, long before they book.

01 Premium is still growing

Fine dining turnover is forecast up 4.1% in 2026, against 1.0% for UK restaurants overall. Casual dining has lost 23.4% of its sites since 2020.

02 The guest is affluent and travels

Appetite for luxury experiences is growing 1.5 times as fast as for goods. US visitors account for almost £1 in every £5 of inbound spending.

03 The peak now lasts twelve weeks

Hospitality's twelve biggest trading days run from early November to late January. Gifting is sold in the same window.

04 Discovery is on Meta and Google

Their services take 51% of UK adults' time online. For restaurants and things to do, 38% of social users prefer social to a search engine.

05 2027 will reward measurement

Our base case is 3% to 4% turnover growth for fine dining, flat after inflation. Share will go to operators who can trace spend to bookings.

+4.1%

Fine dining turnover, 2026 forecast

UK restaurants overall: +1.0%. Ref. 8

51%

of UK adults' time online goes to Alphabet and Meta

Ofcom, Online Nation 2025. Ref. 29

38%

prefer social to a search engine for restaurants and things to do

Sprout Social, 2026. Ref. 30

Sources are numbered through the paper and listed from page 18.

CHAPTER 02

A two-speed season

Hospitality has not grown in real terms since spring 2025. The premium end has kept growing.

2.1 · TRADING IN 2026

Managed pub, bar and restaurant groups have run to stand still in 2026. Like-for-like sales moved between a 0.4% fall and a 1.4% rise until September, when growth reached 2.7%, the best month of the year.[1]

Even that was below inflation, which stood at 3.5%.[1, 2] The tracker has not recorded real-terms growth since spring 2025.[1]

Restaurants swung harder: down 1.1% in a wet February and 1.0% in July, when the World Cup pulled spending towards pubs, then up 2.6% in September, their best month since November 2024.[1, 3]

Supply is shrinking with demand. Britain had 98,319 licensed premises in September, 977 fewer than a year earlier, or almost 19 net closures a week. Casual dining has lost 23.4% of its sites since 2020.[4]

Guests are still spending, but less often. In October, card spending in restaurants, cafés and bakeries rose 0.5% while the number of transactions fell 1.6%.[5] Consumer confidence dropped 11 points to −24 in the same month.[6]

Fewer people are eating out at all: participation is down 1.3 points to 56.8%. Those who still do are going 3.9% more often.[7]

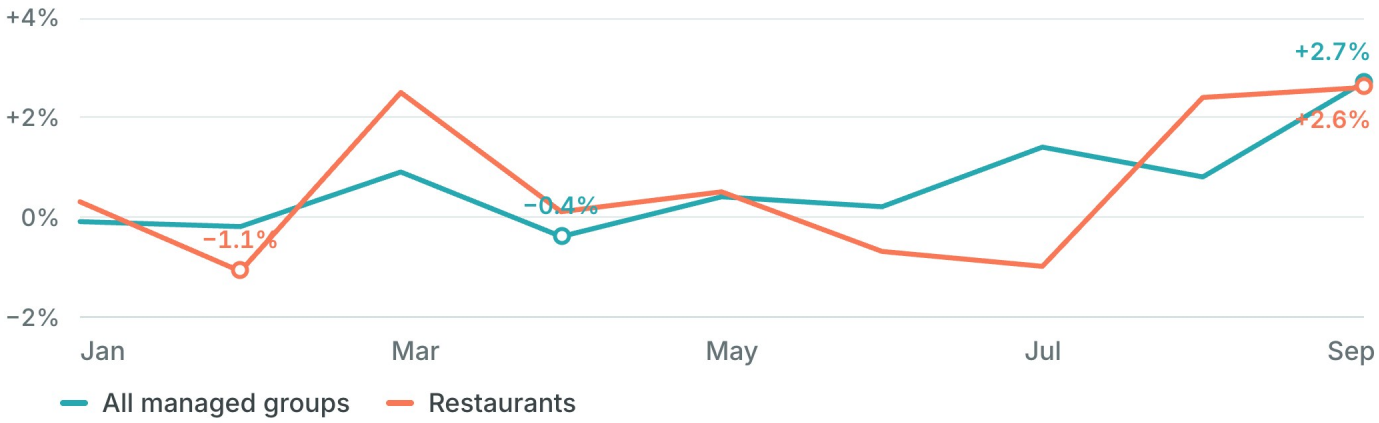


Figure 1 Like-for-like sales growth in 2026: the best month was still below inflation

Source: NIQ RSM Hospitality Business Tracker, monthly releases, January to September 2026 (references 1 and 3).

2.2

Premium is pulling away

The UK's service-led restaurant market is forecast to reach £18.7bn in 2026. That is growth of 1.0%, with the number of sites down 0.9% to 25,915.[8]

Inside that flat total the segments are moving apart. Fine dining turnover is forecast up 4.1% and its site count up 2.5%, on the strength of higher-income demand. Independents are forecast to shrink on both measures.[8]

The demand is for occasions. OpenTable recorded a 19% rise in experiential dining in 2025, and 41% of diners say a pop-up, collaboration or special experience makes them more likely to visit.[9]

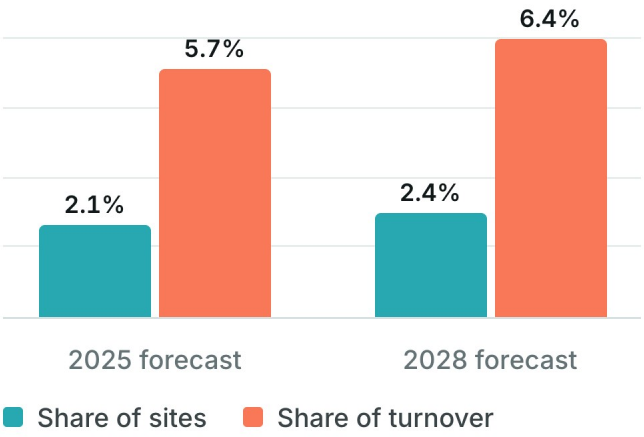


Figure 2 Fine dining's share of UK restaurant sites and turnover

Source: Lumina Intelligence, UK Restaurant Market Report 2025 (reference 10).

Table 1 Turnover and site growth by segment, 2026 forecast

Source: Lumina Intelligence, reported by Restaurant, 31 July 2026 (reference 8).

SEGMENT	TURNOVER	SITES
Fine dining	+4.1%	+2.5%
Branded	+3.0%	+0.2%
Whole market	+1.0%	−0.9%
Independents	−0.5%	−1.2%

Fine dining is small and valuable. It accounts for 561 of the UK's 26,130 restaurant sites, 2.1% of the estate, and 5.7% of turnover. Lumina expects that share to reach 6.4% by 2028.[10]

At the very top, 230 restaurants in Great Britain and Ireland hold a Michelin star.[11]

In a June survey of 123 UK chefs and operators, 25% reported guests spending more on tasting menus, pairings and chef's tables, while 37% saw guests trading down.[12]

Costs keep rising for every operator. The National Living Wage goes up 3.9% in April 2027, to £13.21, and the Budget left the headline rates of National Insurance and VAT unchanged.[13] Margin has to come from fuller rooms and higher spend per head.

CHAPTER 03

The destination diner

Affluent guests are putting experiences ahead of things, and they will travel for the right table.

1.5×

faster growth in appetite for luxury experiences than for goods

Bain & Company, 2026. Ref. 14

3.1 · EXPERIENCES AHEAD OF THINGS

Luxury spending has stopped growing in aggregate. Bain and Altagamma put the global market at €1,443bn in 2025 and expect growth of between zero and 2% in 2026.[14]

Inside that total, money is moving from goods to experiences. Appetite for experiences is growing 1.5 times as fast as appetite for goods, immersive bookings across dining, leisure and entertainment are up 30% on last year, and fine dining is among the categories gaining as affluent consumers buy less but better.[14]

UK data agrees. Growth in eating out is concentrated among affluent consumers, especially 25 to 34 year olds and higher-income households, while lower-income groups continue to pull back.[7]

The guest base is growing too. Knight Frank counted 27,876 people in the UK with a net worth above $30m in 2025, 12% more than in 2021.[15]

Dining is central to how this audience spends. In a survey of more than 1,600 affluent travellers, 41% named fine dining as a preference, rising to 56% among high-net-worth respondents.[16]

And it travels. Food and drink scores 8.2 out of 10 for importance in choosing a destination, and 66% of leisure travellers say it matters more than it did five years ago.[17] In Skift's research, 71% of travellers are most likely to spend on food and culinary experiences, the top category by a wide margin.[18]

+30%

Immersive bookings across dining, leisure and entertainment

Year on year. Bain, 2026. Ref. 14

56%

of high-net-worth travellers name fine dining as a preference

PoB Hotels and Altiant. Ref. 16

71%

of travellers most likely to spend on food and culinary experiences

Skift, 2026. Ref. 18

3.2

The international guest

Great Britain received 36.9 million overseas visits in 2025, worth £29.2bn.[19] 2026 has been harder: in August VisitBritain cut its forecast to growth of 2% in visits and 2% in spending, a fall of 1% after inflation, mainly because long-haul travel weakened.[20]

European visits are forecast up 4% and European spending up 7%. Long-haul visits are forecast down 3%, and fell an estimated 7% in the first half.[20]

VisitBritain expects long-haul markets to recover in 2027 if the Iran conflict has ended.[20]

The American guest matters most. US residents made 5.5 million visits to Great Britain in 2025, more than any other country.[19] VisitBritain's forecast for 2025 put their spending at a record £6.7bn, almost £1 in every £5 spent by inbound visitors.[21]

In London, US visits rose 20% and US spending more than 70% between 2019 and 2024.[22] Demand from the US remains resilient at the premium and luxury end.[23]

The practical reading: market to Europe now, and stay visible to the American guest for 2027.

Table 2 Inbound tourism forecast for 2026, by market

Source: VisitBritain, 2026 inbound tourism forecast, 27 August 2026 (reference 20). Change on 2025; spend in nominal terms.

MARKET	VISITS, 2026	SPEND, 2026	VISITS, FIRST HALF
Europe	+4%	+7%	+4%
Long haul	−3%	−2%	−7%
All markets	+2%	+2%	+1%

5.5m

US visits to Great Britain in 2025, the most of any country

ONS, Travel trends 2025. Ref. 19

£6.7bn

Forecast US visitor spend in 2025, almost £1 in every £5

VisitBritain. Ref. 21

41%

of the world's ultra-wealthy forecast to be in the US by 2031

Up from 35%. Knight Frank. Ref. 24

CHAPTER 04

The shape of the year

The festive peak now lasts twelve weeks, and the quieter months are decided before they arrive.

+67%

more transactions on 13 December 2025 than on an average day

Square data via UKHospitality. Ref. 25

Sep to Oct
Festive tables are booked
Christmas Day bookings are made 50 days ahead on average.

Nov to Dec
Peak trading and gifting
The busiest days of the year, and 43% of hotel voucher revenue.

Jan to Mar
A late peak, then three occasions
Valentine's Day, Mothering Sunday and Easter all fall by 28 March in 2027.

Apr to Sep
Visitor season
The main months for overseas visitors, and the first test of long-haul recovery.

Figure 3 When destination guests decide, and when they dine
Source: Invincible Digital, from references 20, 25 and 26 and the 2027 calendar.

Festive trading is no longer a December event. The twelve biggest trading days of the 2025 season were spread across twelve weeks, from early November to the last weekend of January.[25]

The busiest was 13 December, with 67% more transactions than an average day. The second Saturday of November ran 65% above average and the last Saturday of January 61%.[25]

Guests commit early. Christmas Day bookings are made 50 days ahead on average, and December hotel bookings are reported to be tracking 24% ahead of last year.[26]

Gifting follows the same clock. Hotels take 43% of their gift voucher revenue in November and December.[26] Online gift card sales rose 66% year on year in the second half of 2025, and digital formats now make up 52% of the gift card market.[27]

The shift is generational: 41% of UK adults planned to give a shared experience instead of a physical gift last Christmas, rising to 57% of Gen Z and 59% of Millennials.[28]

A voucher sold in December fills a table in the quieter months that follow, which makes the festive campaign the first campaign of 2027.

CHAPTER 05

How guests find you

The search for a table starts on a feed, a map or a chatbot. Alphabet and Meta own most of the places it happens.

51%

of UK adults' time online is spent with Alphabet and Meta

2 hours 18 minutes a day. Ofcom. Ref. 29

UK adults spend four and a half hours a day online, and 51% of that time goes to services owned by Alphabet and Meta.[29] A restaurant missing from those services is missing from half of its guests' screen time.

Discovery has moved to the feed. Restaurants, bars and things to do is the category where people are most likely to choose social over a search engine: 38% prefer it.[30] Asked how they learn about a venue, 32% of British consumers said social media and 27% said Google Maps.[31]

Friends carry weight: 58% are more likely to visit somewhere their friends have posted about.[31]

Search still closes. A search engine remains the first choice for 53% of people, against 21% for social media and 12% for AI chat,[30] and the UK makes about three billion Google searches a month.[29]

AI is the third route, and it is growing. Around 30% of keyword searches now return an AI overview,[29] 26% of consumers use AI tools to learn about venues,[31] and OpenTable finds diners who arrive through AI assistants spend 20% more.[32]

The affluent guest is no different: 69% of ultra-wealthy consumers say social media has directly influenced a luxury purchase.[33]

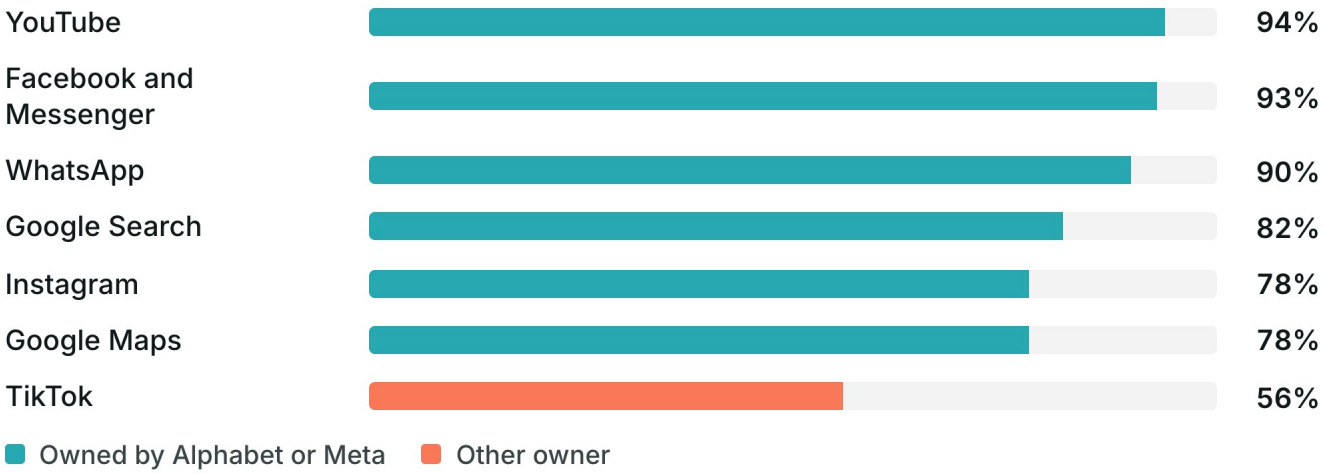


Figure 4 Alphabet and Meta services each reach at least 78% of UK online adults

Source: Ofcom, Online Nation 2025 (reference 29). Share of UK online adults using each service, May 2025.

CHAPTER 06

The case for Meta

Meta is where the affluent guest spends time, where demand is created, and where a booking can be traced to an ad.

93%

of UK online adults use Facebook and Messenger

Instagram: 78%. Ofcom. Ref. 29

It reaches the guest you want

Facebook and Messenger reach 93% of UK online adults and Instagram 78%. Among 35 to 54 year olds, 86% use the Facebook app and 70% use Instagram; among the over-55s the figures are 83% and 52%.[29] The guests most able to afford a tasting menu are well within reach.

It creates the occasion

Nobody searches for a restaurant they have not heard of. Paid social puts the room, the plate and the story in front of people before they start looking. Creative does most of the work: NCSolutions attributes 49% of advertising's incremental sales to the creative itself.[34] In Meta's own data, partnership ads run with a creator cut cost per acquisition by 19%.[35]

It reaches visitors early

Campaigns can be built by country and language, so an American or European guest sees the restaurant while planning the trip, not after landing. With 63% of travellers taking destination ideas from social media,[18] this is where an itinerary takes shape.

Efficient, and getting dearer

In US benchmarks, restaurant ads on Facebook cost $0.45 a click against $2.05 for a Google search click.[36, 37] But Meta's average price per ad rose 14% year on year in the third quarter,[38] and UK social media ad spend is forecast to grow 20.7% this year.[39] The advantage goes to advertisers with stronger creative and cleaner data.

86%

of UK 35 to 54 year olds use the Facebook app

Ofcom, May 2025. Ref. 29

$0.45

Cost per click for restaurant ads on Facebook

US benchmark. WordStream. Ref. 36

+14%

Meta's average price per ad, year on year

Third quarter 2026. Ref. 38

CHAPTER 07

The case for Google

Google is where intent is declared. When a guest searches for a table, the answer should be you.

82%

of UK online adults use Google Search

Google Maps: 78%. Ofcom. Ref. 29

Meta introduces the restaurant. Google is where the guest comes back to act. Google Search reaches 82% of UK online adults, Google Maps 78% and YouTube 94%,[29] and a search engine is still where 53% of people start.[30]

Three kinds of search matter: brand searches from people who have seen the restaurant elsewhere; occasion searches such as a tasting menu, an anniversary dinner or a hotel with a starred restaurant; and map searches from visitors already nearby.

Paid search protects all three. In US benchmarks, restaurant search ads earn a 6.83% click-through rate and convert 8.05% of clicks, at $2.05 a click against an all-industry average of $5.42.[37]

The listing does the rest. Google Maps is how 27% of consumers learn about a venue, and 73% do not trust reviews more than three months old.[31] Photos, menus, booking links and recent reviews are part of the advertising, not an afterthought.

Table 3 Search clicks cost more because they arrive with intent

Source: WordStream by LocaliQ, 2026 benchmarks for restaurants and food (references 36 and 37). US campaigns, median values. Read as direction, not a quote for UK costs.

MEASURE	GOOGLE SEARCH ADS	FACEBOOK ADS (TRAFFIC CAMPAIGNS)
Click-through rate	6.83%	2.68%
Cost per click	$2.05	$0.45
Conversion rate	8.05%	Not reported
Cost per click, all industries	$5.42	$0.60

Search and social are one system. Social creates the brand and occasion searches that paid search then captures, which is why the two should be planned and reported together.

CHAPTER 08

The case for stronger social

Organic social no longer reaches people by default. It still decides what they find when they look you up.

A restaurant's social profiles are now part of its front of house. When people look for somewhere to eat, 38% would search social before a search engine,[30] and 32% say social media is how they learn about a venue.[31] What they find there is the first impression.

Posting alone will not carry it. The average Instagram post now reaches between 3% and 5% of an account's followers and the average Facebook post under 2%, and Instagram reach fell 14% in a year.[40] Organic content sets the standard; paid distribution gets it seen.

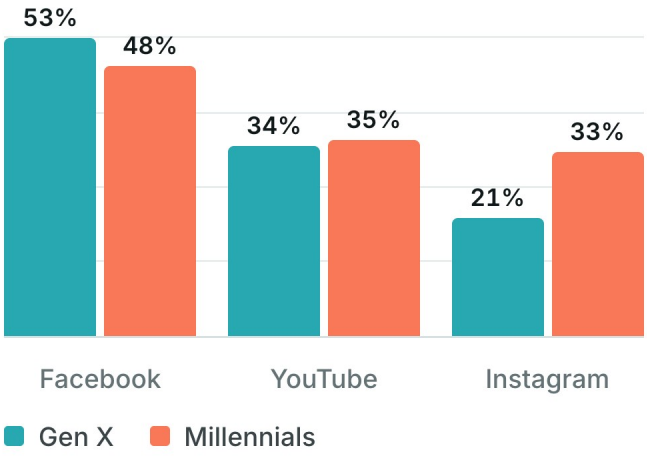


Figure 5 Platforms used to search, by generation

Source: Sprout Social, Q2 2026 Pulse Survey of 2,250 social media users in the UK, US and Australia (reference 30).

Social content is also search content. Since July 2025, public posts from professional Instagram accounts can appear in Google results,[41] so captions, locations and descriptions now work as search copy.

And recommendation still outranks advertising. 58% of consumers are more likely to visit a place their friends have posted about,[31] and 85% of ultra-wealthy buyers say peer recommendations shape their luxury purchases.[33]

What stronger social looks like

- One visual language across organic posts and paid ads.
- Instagram, Facebook and YouTube first. TikTok reaches 17% of high-net-worth individuals outside China, against 37% of adults.[33]
- Creators chosen for expertise, not follower counts, and profiles kept as current as the menu.

CHAPTER 09

Proof, not proxies

Advertising pays on average. The question for an owner is whether theirs did, and which part of it.

68%

of UK consumers say they have opted out of cookie tracking

DoubleVerify, 2026. Ref. 42

The evidence that advertising pays is strong. Thinkbox's Profit Ability 2 study of 141 UK brands and £1.8bn of media spend found an average profit return of £1.87 for every £1 within thirteen weeks, and £4.11 over two years.[43]

Averages from large brands do not prove one restaurant's campaign, and the usual proxies are weakening: 68% of UK consumers say they have opted out of cookie tracking and 40% use an ad blocker.[42] A platform dashboard on its own will miss some bookings and claim others it did not earn.

Table 4 Profit returned per £1 of advertising

Source: Thinkbox, Profit Ability 2, 2024 (reference 43). UK, 141 brands. Paid search means generic, non-brand search.

CHANNEL	13 WEEKS	TWO YEARS
Paid search	£2.29	£3.52
Paid social	£1.62	£3.20
All media	£1.87	£4.11

HOW A BOOKING EARNS ITS CREDIT

01

Audit

Check every event from ad click to confirmed reservation, with consent handled properly and server-side signals where cookies fail.

02

Click

When a guest clicks an ad and books, the reservation is credited to that ad through the booking system.

03

Exposure

With no click, a booking counts only if the guest engaged with the ad well beyond the average and then dined.

04

Report

Attributed reservations, new against returning guests, and return on ad spend, gross and net.

A guest who scrolled past an ad and happened to dine is not counted. That discipline is what makes the remaining numbers worth acting on.

CHAPTER 10

The 2027 outlook

A soft first half, a better second, and growth that comes from spend per head, not covers.

4%

Bank Rate after November's quarter-point rise

Bank of England. Ref. 2

10.1 · WHAT THE FORECASTERS EXPECT

Table 5 The published forecasts behind our 2027 view

Source: OBR for growth, inflation and earnings; Bank of England for inflation; HM Treasury for the wage; AA/WARC for advertising (references 44, 2, 13 and 39).

INDICATOR	LATEST	2027
UK GDP growth	About 1¼% in 2026	About 1%
CPI inflation	3.5% in September	3½% for the year (OBR); about 5% by mid-year (Bank of England)
Real earnings	Real incomes set to fall	No growth
National Living Wage	£12.71 an hour	£13.21 from April, up 3.9%
UK advertising spend	Up 9.9% in 2026	Up 6.5%
Social media ad spend	Up 20.7% in 2026	Up 13.3%
Search ad spend	Up 9.1% in 2026	Up 6.6%

The economy will not help. The OBR expects growth of about 1% in 2027 with no growth in real earnings, and puts the chance of a contraction at one in five.[44]

The Bank of England raised Bank Rate to 4% in November. It expects inflation to reach about 5% by the middle of 2027, with consumer spending slowing in the first half and recovering somewhat in the second.[2]

Costs rise again in April, when the National Living Wage goes up 3.9%.[13] Media gets dearer too: UK advertising spend is forecast to grow 6.5% in 2027 and social media spend 13.3%.[39]

Two things work in the destination restaurant's favour. Premium demand has held through these pressures in 2026, and long-haul travel is expected to recover if the Iran conflict ends.[20]

10.2 · INVINCIBLE ESTIMATE

Three scenarios for 2027

No forecaster publishes a 2027 number for fine dining, so this one is ours. It starts from Lumina's growth figures for the segment, 4.8% in 2025 and 4.1% in 2026,[8, 10] and adjusts for the weaker outlook on the previous page. It is a planning assumption, not a prediction.

3–4%

Base case: growth in fine dining turnover in 2027

Invincible estimate. Roughly flat after inflation.

Table 6 Three scenarios for destination fine dining in 2027

Source: Invincible Digital estimate. Turnover growth is nominal, before inflation.

SCENARIO	TURNOVER	WHAT IT ASSUMES	WHAT TO DO
Downside	0% to +2%	The energy shock persists, inflation stays near 5% and long haul stays weak.	Protect the base: brand search, email and gifting. Cut spend you cannot trace to bookings.
Base case	+3% to +4%	Official forecasts hold: a soft first half, a better second, flat after inflation.	Build demand at home and in Europe first. Reach the American guest before summer.
Upside	+5% to +6%	The conflict eases, long-haul travel returns and confidence recovers.	Scale what is already measured. Add markets and languages.

Q1
Occasions cluster
Valentine's Day, Mothering Sunday and Easter all fall by 28 March.

Q2
The squeeze
Wage rises land in April and inflation is forecast to peak near mid-year.

Q3
Visitors return
Peak visitor season, and the first test of long-haul recovery.

Q4
The twelve-week peak
Festive and gifting demand. Ad spend peaks, so creative must be ready early.

Figure 6 How we expect 2027 to unfold

Source: Invincible Digital estimate, drawing on references 2, 13, 20, 25, 39 and 44.

CHAPTER 11

Why Invincible

We are a performance marketing agency specialising in hospitality. We build the demand, and we show which bookings it produced.

Everything in this paper points the same way. The guest is affluent, international and online, and the operators who grow in 2027 will be the ones who can reach that guest and prove it. That is the work we do.

AT A GLANCE

- Meta Business Partner, Badged Tier
- Offices in Barcelona, London and Granada
- Paid social, paid search, creative, email and automation
- In-venue attribution live in London and Lisbon since 2026

Table 7 What the evidence asks for, and what Invincible does

WHAT THE EVIDENCE ASKS FOR	WHAT INVINCIBLE DOES
Reach the affluent guest where discovery happens	Meta and Google campaigns planned by audience, market and language, including international campaigns that reach visitors before they travel.
Creative that earns the booking	Treatments agreed first, then 10 to 15 ads per concept, with paid and organic sharing one visual language.
A social presence that matches the dining room	Organic social support and social listening, with partnership ads used sparingly at the top of the funnel.
Proof at reservation level	Our own first-party tag alongside the platform pixel, integration with SevenRooms and Toast, and beacons in venue for guests who never click.
Numbers an owner can read	A client login showing spend, live ads and attributed reservations, new against returning, with return reported gross and net.

11.2

How an engagement runs

The order matters. Tracking comes before spend, so the first pound of media is already measurable. Creative comes before scale, so budget goes behind work that has earned it.

01

Audit

GA4 events, Google Tag Manager, Consent Mode V2, server-side signals and pixel checks, before any media is bought.

02

Treatments

Creative routes agreed on paper first, then produced as 10 to 15 ads per concept.

03

Launch

Campaigns by audience, market and language across Meta and Google, with partnership ads used sparingly.

04

Report

A weekly or fortnightly call and a live login, with return shown gross and net.

IN YOUR LOGIN

What you see

- Campaigns, spend and live ads
- Attributed reservations, new against returning guests
- Best days and times
- Return on ad spend, gross and net, with service charge handled per venue
- PDF downloads

Where we have done it

We run international campaigns by market and language for a restaurant in Lisbon, reaching guests on the US East Coast, in the Nordics and across Western Europe before they travel. Our in-venue attribution has been live in London and Lisbon since 2026.

We are a Meta Business Partner in the Badged Tier, with offices in Barcelona, London and Granada.

CHAPTER 12

Method and references

How this paper was researched

Desk research in October and November 2026, drawing on official statistics, industry trackers, company filings and published surveys. Figures were checked against their sources on 16 November 2026 and are quoted as published.

How to read the numbers

Forecasts are the publisher's own unless marked as an Invincible estimate. Advertising cost benchmarks come from US campaigns and show direction, not UK prices. ONS and VisitBritain count inbound visits on different bases, so their totals differ.

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