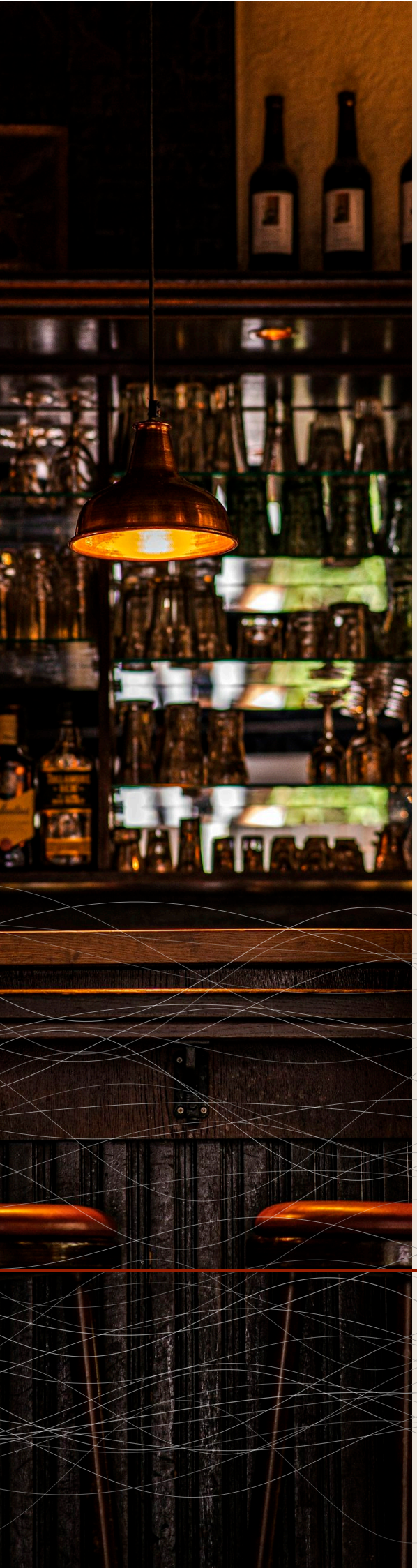


Linearis

SWISS FOODSERVICE REPORT · OCTOBER 2026

Bars **& pubs**

-7% / -27%

Bars lost 7% of their outlets, pubs more than a quarter, the largest fall of all formats[1]

50% → 31%

Change in the share of beer sold out of home in Switzerland[2]

≈85%

Share of drinks in a bar's revenue: food is the room left to raise the ticket[3]

1% / 24% / 48%

Share of bars and pubs belonging to a chain, against fast-food outlets and bakeries: the segment does not leverage economies of scale[4]

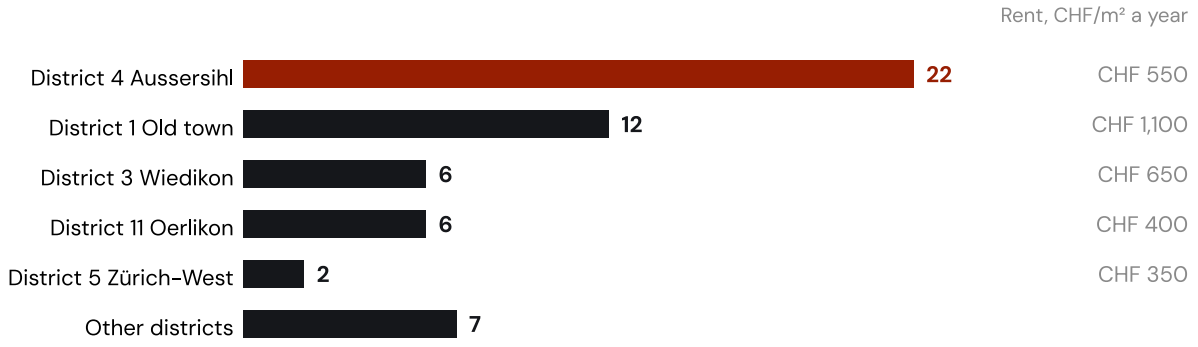
01
The evening needs **new reasons to go out**

Bars and pubs faced the strongest reduction in the number of outlets across the country. Bars lost 7% of their outlets and pubs 27%,[1] almost everywhere in the country, with a stronger impact in Ticino, Zurich and Vaud in terms of total numbers.[5] This reduction follows a change in drinking habits, as the share of people who drink alcohol every day fell from 20% to 9% of the whole population between 1992 and 2022.[6]

The youngest generations are the target of this segment, with half of those aged 16 to 30 saying they visit a bar or club at most once a month, against 83% across all ages,[7] but the share of those who go to a club at least once a week fell from about a third in 2007 to less than a tenth in 2022.[8] Six in ten of them prefer to meet friends at home, but when asked what would bring them back, they named the atmosphere (36%), affordable prices (29%), an outdoor space (29%) and welcoming staff (28%),[7] a sign that the right customer experience can make the difference.

New bars open in neighbourhoods close to the centre, often with lower rents, where people already go out in the evening: Eaux-Vives in Geneva, Sous-Gare in Lausanne, Länggasse and Breitenrain in Bern, St. Johann in Basel.[9,10] In Zurich, for example, about four in ten of the bars opened between 2022 and 2025 are in District 4 (Aussersihl), around Langstrasse, where asking rents of ground floors are about half those of the old town (Figure 1).[10,11]

FIGURE 1 **Bars opened in the city of Zurich by district, 2022–2025, and median asking rent of ground floors**



55 of the 87 bars opened in 2022–2025 located by name and address. Rent: median asking rent of commercial ground floors, gross, by postcode (8004, 8001, 8003, 8050, 8005), October 2026. Sources: City of Zurich, licensed establishments; Linearis, market screening, 2026.

New formats give other reasons to go out. In Geneva, Yume Dumpling Bar, opened at the end of 2025 in the Pâquis, mixes dumplings made in-house, cocktails and vinyl records on its own sound system.[12] In Zurich, Sono-Bar, a hi-fi bar opened in April 2026 in District 4, has a DJ playing vinyl for hours, with free entry and the mixing desk set among the guests' seats, and earns from drinks and private hire.[13]

1 BFS, Statistics on enterprise structure (STATENT), NOGA 563001, 2018–2024 (bars 1,577 → 1,471; pubs 662 → 481); split between bars and pubs estimated with OpenStreetMap shares.
2 Share of beer drunk in bars, restaurants and hotels: 50% in 2012 (GastroJournal, Schweizer Bierkonsum ist rückläufig, 28 November 2023); 31% in 2024/25 (Swiss Brewers' Association, Braujahr 2024/25, press release, 26 November 2025).
3 20 Minuten (C. Pirskanen), Alkoholkonsum in der Schweiz sinkt: Sollen Bars und Klubs gerettet werden?, 13 January 2025.
4 Linearis, market screening of the ten largest Swiss cities, 2026 (OpenStreetMap and chain websites). Outlets, not brands: bars and pubs 6 of 1,015 (about 14 counting the bars of Holenstein Gastro, a group with at least five bars); fast food 293 of 1,206; bakeries 223 of 466. Chain: brand with at least five outlets in Switzerland. Holenstein Gastro: OpenStreetMap (operator), July 2026, and Blick, Zürcher Gastrokette schliesst vorübergehend 15 Beizen, 27 October 2020.
5 BFS, Statistics on enterprise structure (STATENT), bars and pubs (NOGA 563001) by canton, 2018–2024: Ticino -54, Zurich -37, Vaud -30, Basel-Stadt -17 (-22%).
6 BFS, Schweizerische Gesundheitsbefragung: Alkoholkonsum von 1992 bis 2022 – Immer weniger Personen trinken täglich Alkohol, press release, 3 September 2024.
7 watson (R. Steiner), Grosse watson-Umfrage zeigt: So selten geht die Schweiz in Bars und Clubs (DemoSCOPE survey, 4–10 June 2025, n=7,863), 4 July 2025.
8 SRF (A. Kreidler), Kein Spass am Nachtleben: Warum gehen junge Menschen nicht mehr aus?, 17 May 2026.
9 Articles on city neighbourhoods: Swiss Magazine (2026); The AU Review (2025); Mona Mona (2023); Blick / Handelszeitung (2023); von Bartha (2022); Der Internaut (2020); zentralplus (2019); ZHAW Impact (2019).
10 Linearis, market screening, 2026 (asking rents of commercial ground floors, gross, median by postcode, 26 October 2026): postcode 8004 CHF 550 (15 listings), 8001 CHF 1,118 (14 listings, prime streets excluded), per m² a year.
11 City of Zurich, register of licensed food and drink establishments (open data), 2021–2025; bars identified by Linearis by matching with OpenStreetMap: 55 of the 87 bars opened in 2022–2025 located (District 4: 22; District 1: 12).
12 Amoiel, Yume Dumpling Bar: flavours and sounds, 7 November 2025 (Rue de la Navigation, Geneva).
13 Tsüri.ch (K. Vogt), Schallplatten, Klangqualität, Cocktails: Neues Bar-Format erobert Zürich, 20 May 2026.

02
Pub chains, **and a group of bars**

Only 3% of the pubs in the ten largest cities belong to a chain,[14] and the two chains, Gastrag and Les Brasseurs, show different approaches: a standard pub atmosphere in Gastrag's locations, and a focus on the product and the customer experience at Les Brasseurs, with beer brewed in each location; regardless of the model, both have stopped growing (Table 1).[15,16]

TABLE 1 **Pub and bar chains in Switzerland, 2026**

Group	Brands	Format	Venues	Locations
Gastrag AG	Mr. Pickwick Pub, Oliver Twist Pub	English pub with kitchen	7	Aarau, Baden, Basel, Bern, Lucerne, Zug, Zurich
Brasseurs SA	Les Brasseurs	Brewpub with kitchen	5	Geneva, Lausanne, Nyon, Neuchâtel, Sion
Holenstein Gastro	Gräbli-Bar, Keywest, AKT bars, Big Ben Pub and others	Bars and pubs, each with its own name	about 8 bars, 3 pubs	Zurich

Chain: group with at least five venues of the same format in Switzerland. Sources: Gastrag and Mr. Pickwick Pubs websites; Brasseurs SA company page (jobup.ch), 2026; Holenstein Gastro: OpenStreetMap, July 2026, and Blick, October 2020.

Foreign beer brands that run bar networks across Europe, as BrewDog, Mikkeller or Paulaner, have barely entered Switzerland, leaving the space open for operators who know the Swiss market.[17]

For a brewer, an own pub can become a tool for brand statement and differentiation, creating a direct connection with customers, but also a source of revenue, as a channel in which the beer is sold directly to customers, maximizing the margins.[18]

Bars also face a problem: revenue per guest falls as guests drink less, by 40% in five years in the bars surveyed in Zurich, while drinks make about 85% of a bar's revenue.[19] Unlike fast food and bakeries, the segment has not moved towards chains, as only about 1% of bar and pub outlets belong to a chain, against 24% of fast-food outlets and 48% of bakery outlets,[4] and the groups that grow keep the identity of each bar and share purchasing and administration behind the scenes.[20] In Zurich, about one bar in nine opens and as many close every year, while pubs close faster than they open (Table 2).[21]

TABLE 2 **Bars and pubs in the city of Zurich, 2022–2025**

	End 2021	Opened 2022–25	Closed 2022–25	End 2025	Opened per year	Closed per year
Bars	190	87	85	192	11.5%	11.2%
Pubs	62	12	19	55	5.1%	8.1%

Rates: average per year, as % of the venues at the start of each year; a new name at the same address counts as one closure and one opening. Source: City of Zurich, licensed establishments; category from OpenStreetMap.[21]

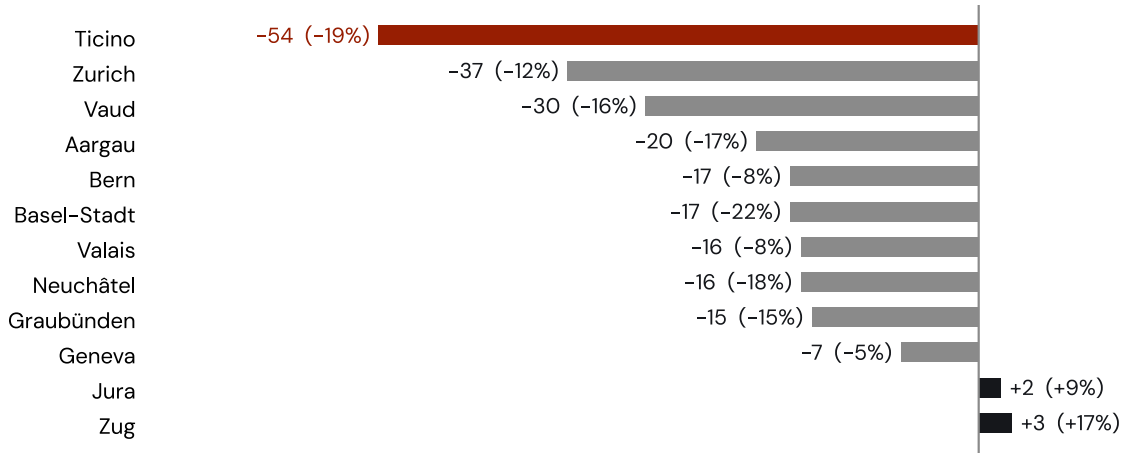
14 Linearis, market screening of the ten largest Swiss cities, 2026 (OpenStreetMap and chain websites): 6 of 221 pubs belong to a chain (brand with at least five outlets in Switzerland).
15 Gastrag AG, Our pubs (Mr. Pickwick Pub, Oliver Twist Pub), accessed 19 October 2026: as many pubs as in 2019.
16 Les Brasseurs, Fabrication de nos bières, accessed 19 October 2026: five pubs opened from 1997 to 2015, none since; BAZG, Verzeichnis der steuerpflichtigen Brauereien, January 2026.
17 BrewDog: more than 100 venues worldwide, bars in Germany with partners and franchising (Tageskarte, BrewDog eröffnet weltweit 40 neue Bars, 30 March 2021); Mikkeller: 32 bars in 2019, one in each Northern European capital (Mikkeller, 25 June 2019), first Swiss bar in Zurich in 2024 through a local partner (Mikkeller, 4 November 2024); Paulaner: about 40 venues worldwide (The Caterer, 10 August 2023); Baladin: one pub in Geneva since 2022. No BrewDog or Paulaner venue found in Switzerland (Linearis, market screening, 2026).
18 Estimate. Retail: the brewery receives about CHF 1.7–2.4 per litre, against a production cost of about CHF 1.15–1.50 per litre (Carlsberg, Annual Report 2025, gross margin 45%). Bar: City of Bern, consumer prices T 05.01.040, 2025 average, draught Swiss lager 3 dl CHF 5.53, CHF 18.43 per litre with VAT.
19 Revenue per guest: bars of the city of Zurich, 2018–2023, Bar and Club Kommission Zürich (A. Bücheli); drinks 85% of a bar's revenue: Swiss Bar and Club Commission survey; both in 20 Minuten (C. Pirskanen), Alkoholkonsum in der Schweiz sinkt: Sollen Bars und Klubs gerettet werden?, 13 January 2025.
20 GastroJournal (C. Bürgi), Konzepte an die Kette legen, 12 April 2017 (R. Bindella: «Wir vereinheitlichen lieber im Hintergrund, wo der Gast es nicht bemerkt»); in Zurich, Holenstein Gastro runs about eight bars under different names (OpenStreetMap, July 2026; Blick, 27 October 2020).
21 City of Zurich, register of licensed food and drink establishments (open data), 2021–2025; bars and pubs identified by Linearis by matching with OpenStreetMap.

03

Fewer venues almost everywhere, **and an opportunity at lunch**

The loss of bars and pubs is spread across the country: between 2018 and 2024 only Zug and Jura gained venues (Figure 2).[5] In Zurich and Vaud the loss reflects the size of the global number of outlets; in Ticino it can be considered from a density perspective, which is three times the Swiss average, 7.8 venues per 10,000 inhabitants against 2.6, the high rents and the closures of historical places not renewed by young generations.[22] In Basel-Stadt the venues fall by 22%.[5]

FIGURE 2 **Bars and pubs by canton, net change in outlets 2018–2024**



Cantons with the largest change; in brackets, change in %. Establishments in Switzerland, December (NOGA 563001). Source: BFS STATENT.

The general loss of venues is a symptom of a business challenge for the whole segment, but if in line with the venue's concept and its operational possibilities, food could represent an opportunity to increase sales also for bars and pubs. Opening at lunch with a short menu uses the room and the tables in the hours when they are empty, and food raises the ticket. Lunch is also the occasion on which people spend most out of home, as more than half of the spending on meals out of home happens at midday.[23] Some new concepts already mix bar and restaurant: in Zurich, RAZZIA opened in 2026 a cocktail bar with its own entrance on the street, leading guests into the restaurant.[24]

22 BFS STATENT, bars and pubs (NOGA 563001), and BFS STATPOP, permanent resident population, 2018: Ticino 7.8 and Switzerland 2.6 venues per 10,000 inhabitants.
23 SRF News, Beim Auswärtsessen wird gespart, 17 April 2013 (GastroSuisse, via sda); no more recent figure published.
24 RAZZIA Zürich, Das «RAZZIA» Zürich eröffnet die neu gestaltete «Bar à Cocktail» (Esther Beck PR), 29 September 2026.

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