

Pub Visiting - UK - May 2013

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“With closures slowing, the now-streamlined pub industry is better placed to take control of its own fortunes and focus on its strengths rather than looking for people to blame for its recent problems.”

– Chris Wisson, Senior Drinks Analyst

In this report we answer the key questions:

- What impact will the 2013 budget changes have on pubs?
- Could pub closures be a blessing in disguise?
- How can pubs improve their use to the community?
- How can the leased/tenanted market improve its performance?

Pubs continue to be a central feature of the leisure industry in the UK, with three in five adults visiting them for a drink in 2013. However, the industry remains in transition and pubs are under pressure from a plethora of factors. The uncertainty surrounding legislative changes such as minimum pricing, pubco-tenant ownership guidelines and tax escalators continue to cloud the outlook in the market.

However, with few signs of notable economic improvements, it is likely that the pub industry faces at least a few more years of tough trading. The now-streamlined industry should be better equipped to thrive in the longer term, with the current total estate of around 50,000 pubs sufficient to serve the UK's ageing population.

Price continues to be an important factor when determining which pubs people visit but this in fact falls behind other factors such as cleanliness and service when it comes to things which deter consumers from certain venues. As discretionary spending continues to be closely scrutinised, pubs are having to work harder to justify the consumer's decision to visit them instead of drinking/eating at home. In this sense, much of the power lies with the landlords themselves and the overall fortunes of the pub industry in the short term will be driven by how many pubs are able to deliver a cost-effective and enjoyable experience for consumers.

This report examines the market for pub visiting, with the primary focus on drinking in pubs/bars. A separate Mintel report, *Pub Catering – UK, May 2013* looks at the business of food in pubs in more detail.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market