Pub Visiting - UK - May 2014

Report Price: £1750.00 | $2834.04 | €2223.04

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"Times have changed for the pub industry and publicans should be carefully working out how to tailor their food menus, for example by using local ingredients and tiering prices, to their customers to stave off competition from other pubs and restaurants."
– Chris Wisson, Senior Drinks Analyst

This report looks at the following areas:

- The rejuvenation and importance of 'pub grub'
- Live sports on TV are a 'nice to have' rather than a 'must have'
- Pubs also need to tap into the family market
- Many pubs that have survived are well placed to now thrive

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 2014 looks at the role of food in pubs in more detail. The market size refers to total pub revenues, and includes food, alcohol, soft drink and other sales such as from snacks and vending machines.

All pubs (public houses) and bars have on-trade licences to serve alcoholic drink for consumption on the premises. These licences may also be granted to other outlets, such as hotels or cinemas, but a pub has at least some traditional characteristics that differentiate it from other bars.

Most pubs trace their heritage to close links, or 'ties', to a local brewery. The brewery traditionally owned the freehold, or a long lease, on the property and then either sublet it to a tenant (tenanted pubs) or installed its own landlord to run it (the managed estate). The managed/tenanted distinction still pertains to many 'estates' (owned groups) of pubs, but tenancies have often been replaced by more modern, long-term leases (leased pubs).

A 'pubco' (pub company) is independent from the control of a brewer, although it may negotiate long-term supply contracts with a single brewer and thus maintain close links with the brewing industry. Leased/tenanted pubcos make most of their money from supplying beer and other drinks to their tenants at wholesale prices. A free house has no contract to a specific pubco or brewer, and is run as an entirely independent business.

'Wet sales' refers to the proportion of a pub's turnover from drinks (sometimes confined to alcohol), while 'dry sales' refers to food turnover.

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Market sizes at constant 2013 prices are devised using Mintel's catering deflator. Value figures throughout this report are at retail selling prices (rsp) unless otherwise stated.

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DID YOU KNOW?

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

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Appendix – The Consumer – Engagement with Pubs

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