

Drinking Out of the Home - UK - August 2011

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“The on-trade needs to remind consumers of the positive elements of drinking out of the home and the qualities that cannot be easily replicated in the home. Socialising with friends and meal occasions are the main motivators to drinking out of home (for 68% and 63% of consumers respectively), which could be leveraged more actively in the on-trade’s marketing and product offer.”

– Amy Lloyd, Food and Drink Analyst

In this report we answer the key questions:

- How can cultivating the experiential element of drinking out of home drive footfall?
- How can drinks brands leverage eating out to drive out-of-home custom?
- How can catering to specific occasions help to attract consumers and drive premiumisation?
- How can the on-trade encourage greater experimentation and fuel premiumisation?
- How can on-trade operators target the older consumer?

Definition

The report covers the purchasing of alcohol for consumption in on-trade outlets (mainly pubs) outside of the home. It does not include consumption in the home, nor does it cover sales of soft drinks or hot beverages.

Some broader definitions of relevance to this sector are:

- All pubs and bars have full licences to serve alcoholic drink for consumption on the premises. These licences may also be paid for, and granted to, other outlets (eg hotels, restaurants, stores, cinemas), so that not all fully licensed premises are necessarily pubs or bars. Together, they comprise the on-trade.
- A pub (public house) has at least some traditional characteristics that differentiate it from bars, which are usually modern in style. Almost all pubs have their heritage in close links, or ‘ties’, to a 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 (managed pubs). The managed/tenanted distinction still pertains to many ‘estates’ (owned groups) of pubs, but tenancies have often been replaced by more modern, long-term leases (leased pubs).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 one which is independent from the control of a brewer, although it may negotiate long-term supply contracts

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with a single brewer and thus maintain close links with the brewing industry.

- Branded pubs are outlets which share a multiple brand with other pubs in a group, on similar lines to retailing multiples or 'chains'. The term 'high street pub' or bar is applied to outlets in city and town centres, to distinguish them from the smaller community pubs in residential areas; they may be independents, or in a multiple.
- Mintel defines an independent pub or bar as one which is not part of a chain or group tied to a particular brewer or owned by a large pub retailing company. In the traditional terminology of the on-trade (ie outlets licensed to sell alcohol), the term 'independent' is interchangeable with 'free house'. The independent, or free house, is distinguished not only from those pubs that are clearly part of a branded chain (eg Wetherspoon, O'Neill's or Beefeater), but also from the groups of pubs in estates that share a common owner, even if the individual pubs are run by tenants or lessees.

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