

## Pub Visiting - UK - May 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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“Locally sourced food and drink attracts strong consumer interest and offers a viable means for pubs/bars to appeal beyond price. Flagging up that certain meal components or drinks are sourced locally would also help to strengthen the idea of pubs as supporting the local economy, evoking a feel-good factor.”

– Alice Baker, Research Analyst

This report looks at the following areas:

- Consumers’ price consciousness sets pubs/bars a challenge
- Locally sourced food and drink appeals to many
- Technological innovations can bring advantages, but must not overshadow the social aspects of pubs/bars

Nine in 10 UK adults visit pubs/bars, though for most people this is only an occasional activity. 18-34s are more frequent visitors than older cohorts. The market is strongly price-led, leaving the sector exposed should there be a return to income squeeze in future years. There is scope for pubs/bars to explore technological innovations given consumer openness to these. Local sourcing is a promising area for pubs/bars to explore given the high consumer demand. There is also scope to play on the idea of the pub as a pillar of the local community.

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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

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### The Market – What You Need to Know

- Revenues rise over 2014-18 despite falling numbers of pubs
- Slow growth expected for 2019-23
- Weather extremes of 2018 impact the pub sector
- Rising costs for the pub industry

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Experiential activities and new technology boost leading pub companies

Pub chains diversify their food and drink offering

Pub companies continue with ethical initiatives

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Sales growth for both managed and tenanted/leased pubs in 2018

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Figure 11: Turnover of selected leading managed pub operators in the UK, 2013/14-2017/18

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Punch Taverns returns to profits

Figure 17: Key financial data for Punch Taverns, 2014-18

### Recent Activity and Innovation

Pub chains expand their drinks ranges

JD Wetherspoon continues to support craft spirits...

....and moves to replace European alcohol brands with non-EU alternatives

Greene King introduces kombucha in its London pubs

Ei Group supports low-/no-alcohol beers in January promotion

Pub chains and independents continue with ethical initiatives

Greene King looks to address food waste with new app...

...and links with Royal British Legion to mark the First World War centenary

Pub chains take action on plastic straws

Various pubs link with craft brewery to support homelessness charities

Wetherspoon targets students with discount voucher books

Samuel Smith's imposes mobile phone ban

Pubs expand their vegan offering

Added vegetables trend extends into the pub sector

### The Consumer – What You Need to Know

Nine in 10 adults visit pubs or bars

Comforts of home trump pubs/bars for half of non-/infrequent visitors

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Pubs lead on informal occasions but lose out for celebrations

Locally-sourced food and drink appeals to many

Recommendations prompt visits

### Frequency of Visiting Pubs and Bars

Nine in 10 adults visit pubs or bars

Figure 18: Pub/bar/nightclub visiting, by time of day, March 2019

Pub visiting frequency is linked with financial health

Men drink at pubs more often than women

Most people visit pubs/bars only occasionally

Figure 19: Frequency of visiting pubs/bars, by time of day, March 2019

18-34s are the core pub/bar visitors

### Barriers to Visiting Pubs and Bars

Comforts of home are more compelling for half of non-/infrequent pub/bar visitors

Figure 20: Barriers to visiting pubs and bars, March 2019

Link-ups with home delivery and streaming services should benefit pub/bar operators

Noise levels in pubs are a major reason for people preferring to stay at home

'Quiet zones' appeal strongly to those who find pubs too noisy

Price considerations deter four in 10

Venue-exclusive drinks can help pubs to better compete with retail

Regularly rotating drinks lists should appeal especially to younger people

### On-trade Venues Favoured for Particular Occasions

Pubs are the go-to venue for drinks at all times of the week

More people choose pubs for drinks at weekends than weekdays

Figure 21: On-trade venues favoured for particular occasions, March 2019

Pubs lead when people want to relax

Pubs lag behind restaurants for celebrations

Pubs are the top choice for taking advantage of good weather

Need to remind people of pubs'/bars' suitability for all weather conditions

### Interest in Products and Services in Pubs and Bars

Locally-sourced food and drink appeals to just under half of patrons

Local sourcing can help to strengthen pubs' image as supporting the local economy

Local sourcing can tempt people willing to go further afield

Figure 22: Interest in products and services in pubs and bars, March 2019

Trendy food and drink appeal especially to under-35s...

Sourcing ingredients for trendy dishes locally should boost appeal

...as do in-house alcoholic drinks

Interactive elements should help to build consumer engagement

In-house drinks team up well with locally-sourced food/drink

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Technological innovations appeal particularly to under-35s and parents

Ordering apps offer advantages to both venues and customers...

...but pubs and bars must not neglect the social aspects

Foodservice sector offers potential cues on computers in venues

### Behaviours Related to Pub and Bar Visiting

Recommendations prompt visits...

...and should be well-placed to persuade people to venture out of their local area

Figure 23: Behaviours related to pub and bar visiting, March 2019

Discount vouchers and shared knowledge marketing messages should help to incentivise recommendations

Six in 10 stick to the same brands in pubs and bars

Use staff recommendations to drive trial and add value

Look to harness the power of peer recommendations

Sampling opportunities should appeal

Opinions are divided on whether independent establishments offer better quality than pub chains

Younger people are especially likely to rate the quality of independent pubs

Focus on provenance should benefit both larger and smaller establishments

Price is a major influence on choice of pub

Local sourcing can help to appeal to those who are not influenced by price

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Abbreviations

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### Appendix – Market Size and Forecast

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