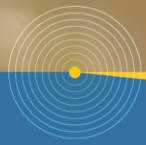


UK Pubs & Bars Market Report 2021

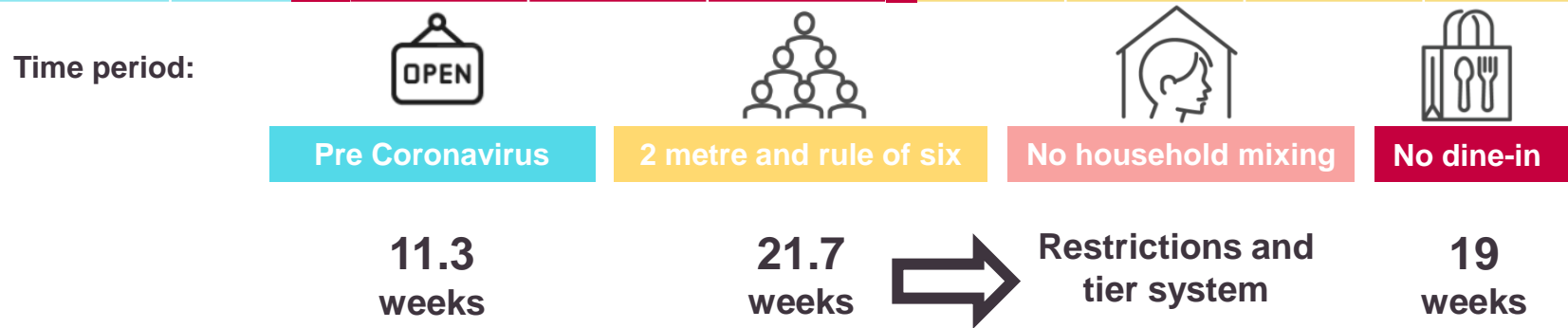
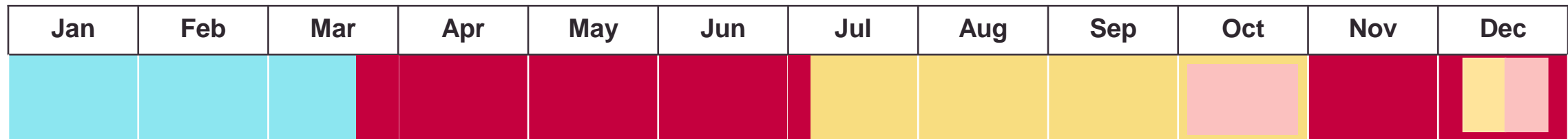
September 2021



TOTAL PUB MARKET DECLINES BY -60.6% IN 2020

The coronavirus pandemic wiped £13.9 billion of value from the pub market in 2020 with the market declining by -61%. Operations enjoyed just 11.3 weeks of 'normal' trading in 2020 followed by 40.7 weeks of varying restrictions and dine-in closures.

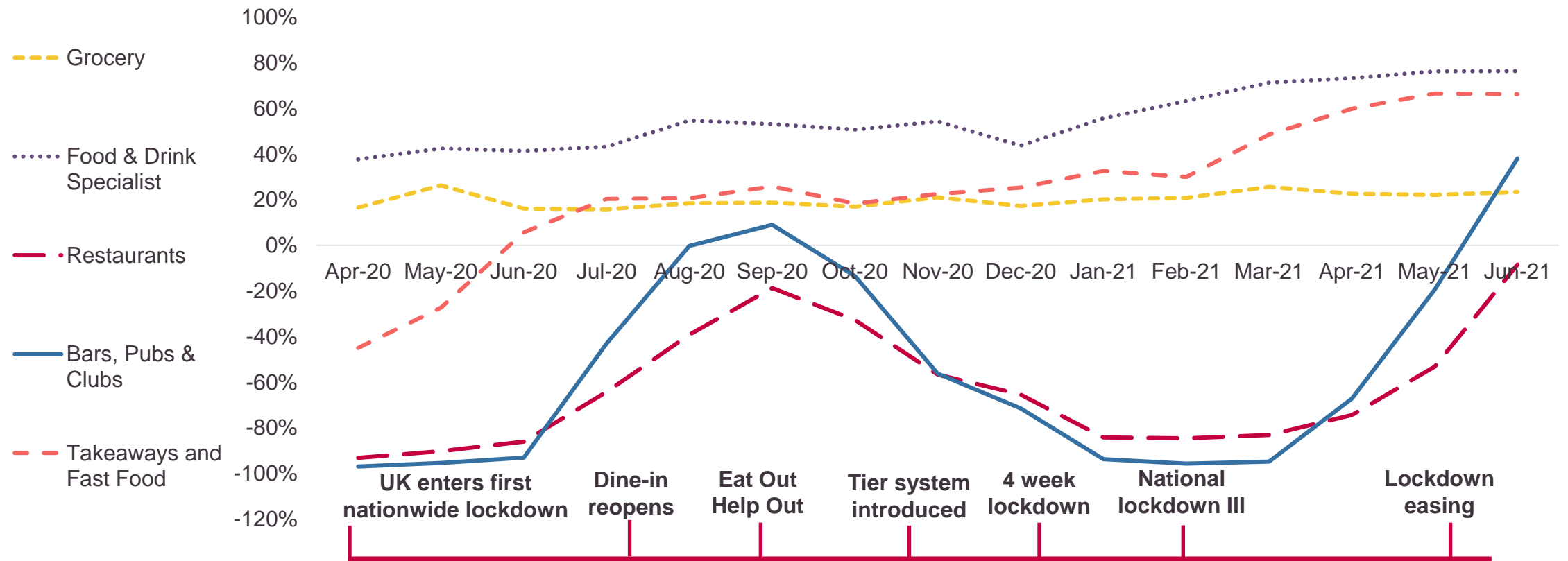
Total market value 2020	Turnover percentage decline	Turnover absolute decline	Total market outlets in 2020	Outlet percentage decline	Outlet absolute decline
£23.0bn	-60.6%	-£13.9bn	43,382	-4.3%	-1,930



Source: Lumina Intelligence, September 2021

PUB SPENDING IN POSITIVE GROWTH FOR FIRST TIME SINCE SEP 2020

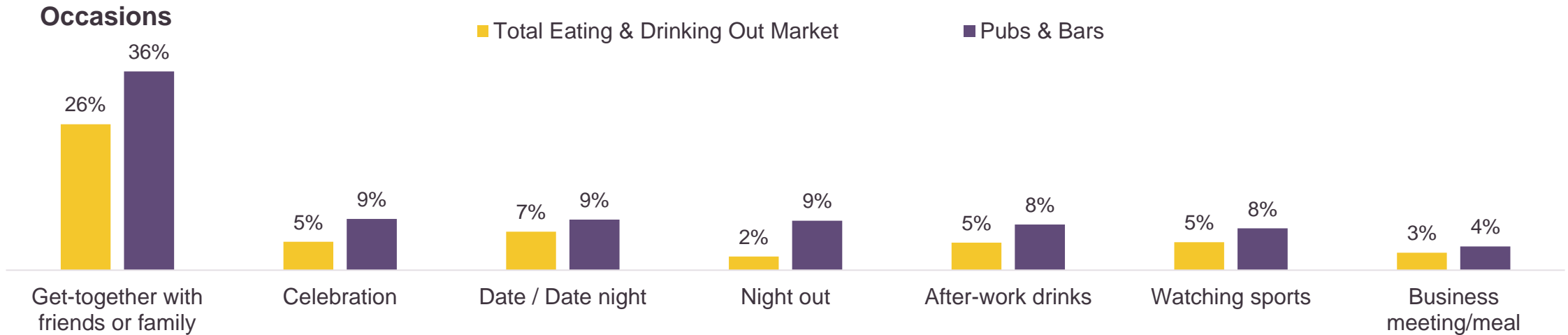
Spending on pubs, bars and clubs increased by +38% in June 2021, compared with the same month in 2019. Spending in June was bolstered by Euro's competition which kicked off on 11 June. Pubs fared better than restaurants which suffered a decline of -8%.



Source: Barclaycard Consumer Spending Reports, April 2020-April 2021, 2020 and 2021 figures show percentage change versus the same month in 2019

OVER A THIRD OF PUB VISITS ARE GET-TOGETHERS

36% of pub and bar visits are get-togethers with friends and family. Deals that offer convenient pricing for larger groups are the best way to capitalise on the most common mission. Cheaper meals for children are a great way to attract families and drinks offers, such as 2 for 1 and happy hours, are the most effective way to target friend groups.



Sizzling Pub & Grill

Source: Lumina Intelligence Eating and Drinking Out Panel - data collected between w/e 2020/11/08 and w/e 2021/07/11

Sizzling Pub & Grill offer on kids meals.

La Cubana, Sheffield, happy hour menu.



61% OF ALCOHOLIC DRINKS CONSUMED ARE BEER

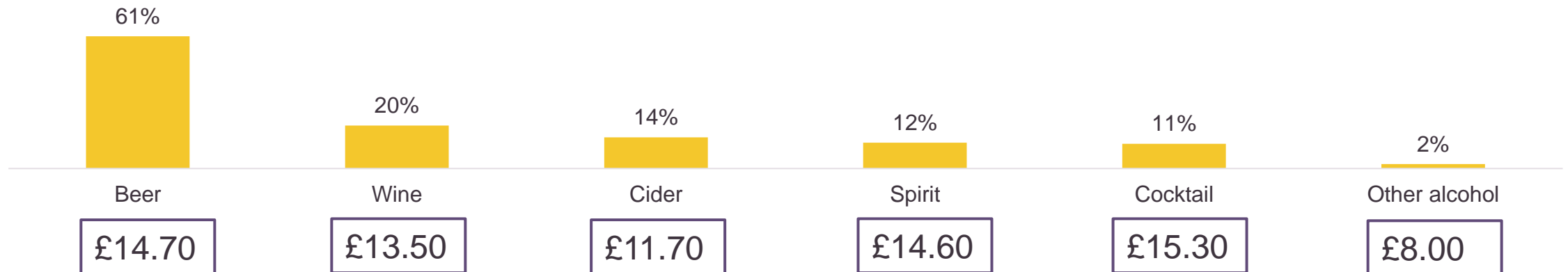
65% of drinks bought and consumed in pubs and bars are alcoholic drinks. Of this, 61% are beer, making beer a vital product for pubs & bars. Consumers report spending more on beer than any other alcoholic drink, due to the greater number of drinks bought. Over half of those who have had an occasion including beer, report ordering 3 or more beers in that occasion, pushing up the value of the drink.

Drinks bought and consumed

■ Alcoholic drinks ■ Both ■ Non-alcoholic drinks



Alcoholic drinks consumed and average spend*



*Average spend per visit – might include more than one drink

Source: Lumina Intelligence Eating and Drinking Out Panel - data collected between w/e 2020/11/08 and w/e 2021/07/11

GLUTEN-FREE MENUS IN PUBS BECOME MORE EXTENSIVE

The growing proportion of consumers following a gluten-free diet has resulted in operators expanding gluten-free menus to offer as many as six main courses as well as catering for children. This will increase consumer expectation for gluten-free menus in pubs.

Gomshall Mill Gluten Free Menu

~ Sunday 13th June 2021 ~

Starters and Nibbles

Warm chorizo sausage, roquito peppers 5.95	Pea and mint soup with cheese toasties 5.95
Nocellara olives (vg) 3.95	Chilli and lime king prawns 6.95
Halloumi fries, tomato salsa 5.95	

Mains

Deep fried cod in beer batter, chips, mushy peas, tartare sauce 14.95/10.95
Smoked haddock and salmon fishcakes, tomato and spring onion salad 13.95/10.95
Pea, feta, mint and asparagus quiche, crème fraîche new potato salad 9.95
Braised shoulder of lamb, minted new potatoes, seasonal vegetables, rosemary gravy 18.95
Chicken, ham and leek pie buttered mash potatoes, greens, white wine and tarragon sauce 14.95
Sweet potato, aubergine and chickpea Malaysian curry, coconut rice, steamed pak choi (vg) 13.95

Sides

Chunky chips 3.75	Buttered vegetables 3.95
Fries 3.75	Minted buttered new potatoes 3.95

Childrens Menu

Chicken goujons, chips, peas 6.95	Triple chocolate brownie, vanilla ice cream 3.95
Fish fingers, chips and peas 6.95	Sticky toffee pudding, vanilla ice cream 3.95
5oz rump steak, fries, peas 8.95	

Brunning & Price gluten-free menu

Gluten Free Menu

Starters

DEVON CRAB & AVOCADO Toast, crab mayo • 9.25
TENDERSTEM BROCCOLI Poached Copper Mariah heritage hen egg, smoked pancetta, Parmesan shavings • 7.50
PAN-SEARED SCALLOPS Rhubarb, samphire, smoked pancetta, pea shoots • 10.25
NORTH ATLANTIC PRAWN SALAD Prawn mayo, chopped cos lettuce, bread & butter • 7.50
MUSHROOMS ON TOAST Pulled oyster mushrooms, garlic & parmy butter, toast • 7.50
SMOKED SALMON Crispy coshies, dandelion green, fraiche • 8.25
PEA & BROAD BEAN SOUP • 6.50

Mains

KING PRAWN & DEVON CRAB RIGATONI* Lime, chilli & coriander pesto • 15.25
CHICKEN BURGER Chicken breast, fresh Cheddar, smoked bacon, spring green lettuce, tomato, fries • 15.50
AVOCADO, RAINBOW BEETROOT & ORANGE SALAD ☺ Fennel, watercress, toasted almonds • 13.50 Add fish ☺ or chicken 2.50
CHICKEN & AVOCADO SALAD Pancetta, avocado, Parmesan, Caesar dressing • 13.75
RISOTTO PRIMAVERA ☺ Peas, asparagus, courgettes, parma, lemon • 14.25 Add fish ☺ or chicken or salmon 2.50

STEAKS

Prime British and Irish steaks expertly aged for a minimum of 30 days to provide the perfect balance of tenderness and flavour.
90z RIBEYE • 22.50
80z SIRLOIN • 21.50
Served with fries and seasonal vegetables.
Add non-seasonal scallops 5.95

Desserts

HOME-BAKED CHOCOLATE BROWNIE ☺ Minted cream, ice cream • 4.95
FRESH BERRY ETON MESS ☺ Meringue, double cream • 7.50
APPLE & RHUBARB CRUMBLE ☺ Vanilla custard or cream • 7.50 Vegetarian alternative available

Browns gluten-free menu

NO-GLUTEN CONTAINING MENU

All dishes on this menu do not use gluten-containing ingredients.

To Start

☑️ Oak-Smoked Chicken Liver Pâté red onion chutney, no-gluten containing seeded roll, butter 5.99	☑️ NEW Creamy Garlic Mushrooms (v) toasted no-gluten containing seeded roll 3.79
Scottish Rope-Grown Mussels' creamy garlic & white wine sauce, samphire, no-gluten containing seeded roll, butter 6.99	Roasted Tomato Soup (v) no-gluten containing seeded roll, butter 4.29

Pub Classics

☑️ Classic Hunter's Chicken grilled chicken breast, smoked cheese, bacon, BBQ sauce, mash, jacket potato or salad 12.29	☑️ Chicken Tikka Masala basmati & wild rice, poppadom shards, cucumber & mint dip 11.99
☑️ British Steak & IPA Pie no-gluten containing pastry, mash, glazed seasonal egg, no-gluten containing gravy 12.49	☑️ Sea Bass and Seared Scallops' king prawn, white wine & pea risotto 15.99
☑️ Gammon Steak fried free-range egg, garden or mushy peas, grilled pineapple, mash, jacket potato or salad 10.79	☑️ Caesar Salad* (590 Calories) baby gem, anchovies, Italian hard cheese, boiled free-range egg 9.99
Pan-Fried Hake with Mussel Chowder* king prawns, samphire, herbly crushed potatoes, mussel, Bacon & char-grilled sweetcorn chowder 16.29	With: Chicken Breast or Halloumi (v) for £3 Sea Bass Fillets', Rump Steak or Scottish Salmon* for £4

Burgers

☑️ Gourmet Beef hand-pressed burger, fried free-range egg, smoked cheese, streaky bacon, BBQ dip, mash, jacket potato or salad 12.29
Signature Barbecue Beef hand-pressed burger, IPA BBQ shredded rib, smoked cheese, IPA BBQ dip, mash, jacket potato or salad 13.99

From the Grill

28-Day-Aged Prime Sirloin 8oz half a grilled tomato, mushrooms, mash, jacket potato or salad 15.99
28-Day-Aged Bistro Rump 8oz half a grilled tomato, mushrooms, mash, jacket potato or salad 13.49
14-Day-Aged Fillet 7oz half a grilled tomato, mushrooms, mash, jacket potato or salad, steak sauce 19.99

Steak Sauces

Steak Side

Chef and Brewer gluten-free menu

Source: Lumina Intelligence, September 2021

FULL REPORT TABLE OF CONTENTS

Executive summary

Market Insight

Total pub market value in 2020

2020 pub market value vs. total eating out market

Pub market developments: Legislation

UK economy figures 2018-2021F – GDI, CPI, consumer spending and average earnings

GFK consumer confidence Jul 2019 - Aug 2021

Consumer spending by channel Apr 2020 – Aug 2021 – grocery, food & drink specialists, restaurants, bars and pubs, takeaway and fast food

Recovery analysis – Property & Location

Pub market in 2021 by value, outlets and model – managed, branded & franchised, independent, tenanted & leased and social clubs

Pub market recovery vs. the total eating out market

UK pub market outlets and outlet decline 2016-2021F

UK pub market structure, 2021F

Pub market share by model

Pub model benefits and challenges

Pub market growth drivers, 2021

Pubs market growth inhibitors, 2021

The perceptions of business leaders to current and future trading conditions

TABLE OF CONTENTS

Competitive landscape

Merger and acquisition activity, 2020-2021

IPO activity, 2020-2021

Top 10 pub groups by turnover, 2019-2021

Top 10 pub groups by outlets, 2019-2021

Wet vs food-led trends

Top 10 smaller pub groups by outlets

Top 5 smaller pub groups By 2021F outlet growth

Recovery by pub location

Top 20 pub brands by outlets

Top 10 smaller pub and bar brands

Fastest growing pub and bar brands, 2021

Business model analysis

Premium-led vs. value-led analysis

TABLE OF CONTENTS

Consumer Insight

Pub and bar penetration vs. other hospitality channels

Average spend per visit

Pub and bar visitor demographics – gender, age, social grade and living situation

Day part share by channels

Key reasons for visiting pubs and bars

Pub and bar consumer missions

Most popular dishes at pubs and bars

Analysis of drinks only occasions – penetration and demographics

Most popular drinks for drinks only occasions

Afternoon tea: key growth area for pubs

Drinks bought and consumed in pubs and bars – including average total spend per visit

Beer brands share of occasions

Most popular wine choices – red, white, sparkling etc.

Most popular non-alcoholic drinks and soft drinks

Future consumer drivers - which of the following would encourage you to visit pubs/restaurants more?

What can restaurants, coffee / sandwich shops, pubs, and bars do to get you to visit again in the next 12 months?

Value for money satisfaction rating over time

Friendly service satisfaction vs. spend

TABLE OF CONTENTS

Product & Price

Brand and sub-channels analysed – ss 2019 – 2021

Average menu dish count – Spring/Summer 2019-2021

Average menu dish count by course – Spring/Summer 2019-2021

Average product count by course by channel – Spring/Summer 2019-2021

Proportion of mains by component protein type – Spring/Summer 2019-2021 – chicken, beef, pork, seafood, lamb, vegetable protein

Dietary requirement flags as a proportion of menus (mains) – Spring/Summer 2019-2021

Gluten-free menus in pubs become more extensive

New product development as a % of menus – Spring/Summer 2019 – 2021

Proportion of all dishes on menus that are advertised as sharing dishes by channel, Spring/Summer 2021 with % change from 2020

Proportion of all dishes on menus that are advertised as customisable by channel, Spring/Summer 2021 with % change from 2020

Examples of sharing and customisable examples

Pub menu price inflation with UK CPI inflation, Spring/Summer 2019-21

Price movements of same-line dishes – Spring/Summer 2020-21

Price movements of same-line dishes by course – Spring/Summer 2020-21

Bar restaurant price movements – Spring/Summer 2020-21

Mainstream pub price movements – Spring/Summer 2020-21

Premium pub price movements – Spring/Summer 2020-21

Value-led pub price movements – Spring/Summer 2020-21

TABLE OF CONTENTS

Future outlook

UK economy forecasts to 2024 – GDI, CPI, consumer spending and average earnings

Total pub market by turnover (m) and turnover growth, 2018-2024F

Total pub market by turnover (m) and turnover growth, 2018-2024F vs. the total eating out market

Turnover and outlet share by pub model, 2024F

UK pub market outlets and outlet decline 2019-2024F

Pub market growth drivers, 2021f-2024F

Pub market growth inhibitors, 2021f-2024F

Ongoing and emerging pub models

Food-led pubs: future development expectation

Wet-led pubs: future development expectation

Experience-led pubs: future development expectation

Delivery is expected to be more important going forward

When ordering and paying at pubs and bars, how do you generally prefer to order and pay?

Are there any features you'd like to see on restaurant apps that aren't currently available?

Operators can use digital order to encourage browsing

Get in touch

For further information about this report please contact:

Holly.franklin@lumina-intelligence.com or

[Visit our website](#)

