

Report Sample

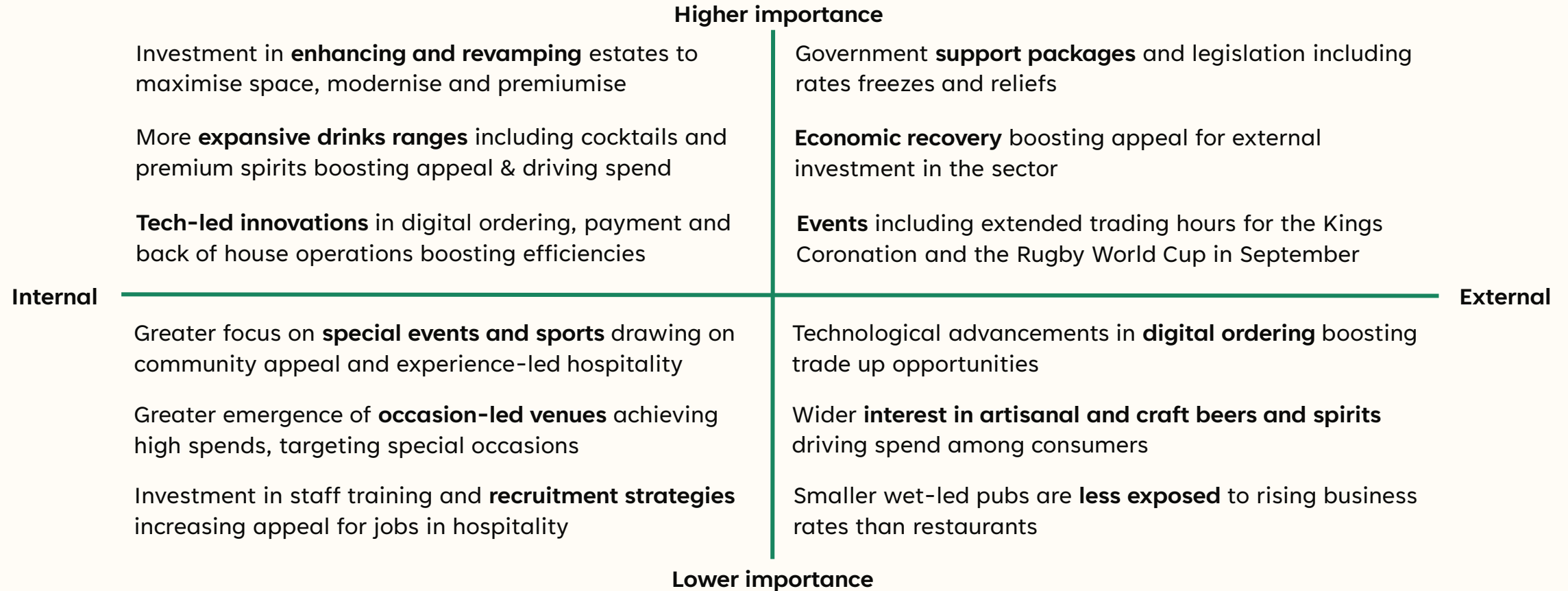
# UK Pubs & Bars Market Report 2023



# Pub market growth drivers, 2023F



Developments in enhancing and utilising spaces and a focus on delivering experiences are expected to drive volume and spend in 2023.



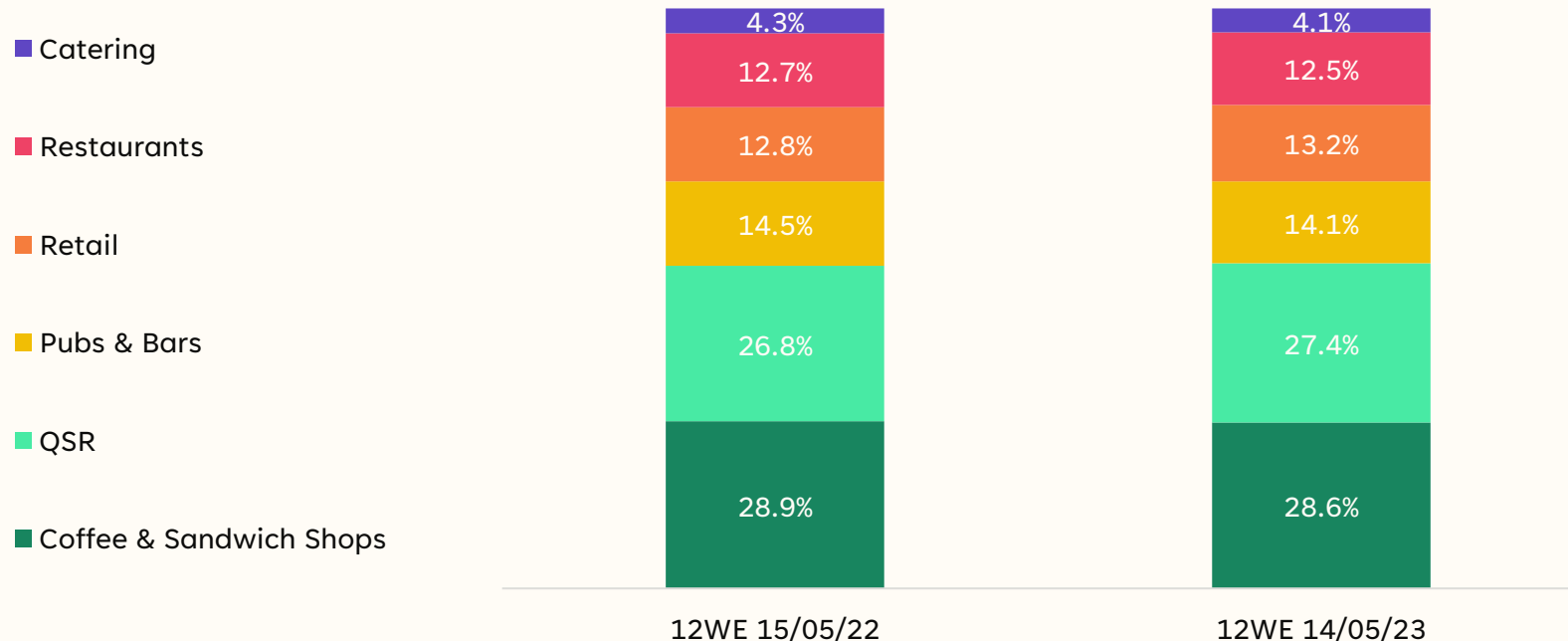
Source: Lumina Intelligence, June 2023

# Pubs & bars are losing share to QSR and retail



Pubs and bars have lost -0.4ppts share year-on-year, with QSR and retail channels being amongst the top beneficiaries in share amidst the rising cost of living. Operators need to re-engage with the younger demographic through targeted communications and by giving them more reasons to visit venues as they are the future of pubs.

## Channel share % of occasions and average spend



**Declines in the share of pubs & bars occasions** have mainly been **driven by 18-34 year olds**.

**Younger consumers have lost share** year-on-year, opting for **more QSR and retail visits** as a way to manage discretionary spend.

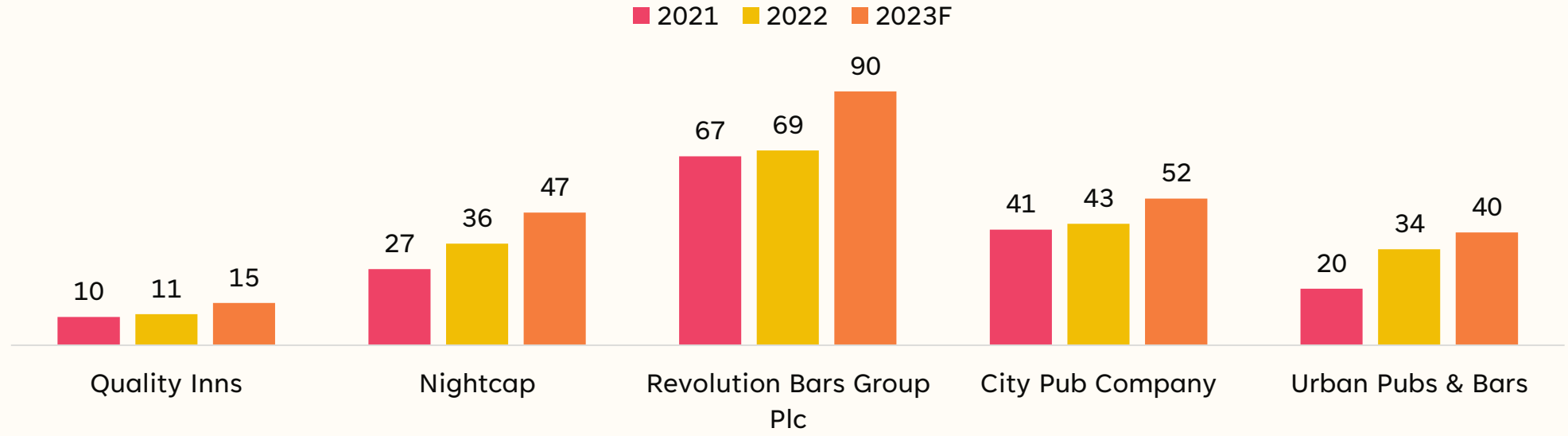
Source: Lumina Intelligence Eating & Drinking Out Panel, data collected 12WE 15/05/22 and 12WE 14/05/23

# Strong acquisition activity is behind outlet growth



Growth leaders Nightcap, Revolution Bars Group and City Pub Group have fuelled expansion through acquisition. In June 2023, Nightcap brought the 10-strong Dirty Martini Group out of administration while City Pub Group has secured a majority share of Mosaic Pub & Dining Group, increasing its estate by +9 sites.

## Top 5 Smaller Pub Groups by 2023F Outlet Growth



<b>21-22% Growth</b>	+10.0%	+33.3%	+3.0%	+4.9%	+70.0%
<b>22-23F% Growth</b>	+36.4%	+30.6%	+30.4%	+20.9%	+17.6%

Source: Lumina Intelligence, June 2023



## Proportion of total dishes containing meat, poultry and seafood, Autumn/Winter 2019 vs 2022

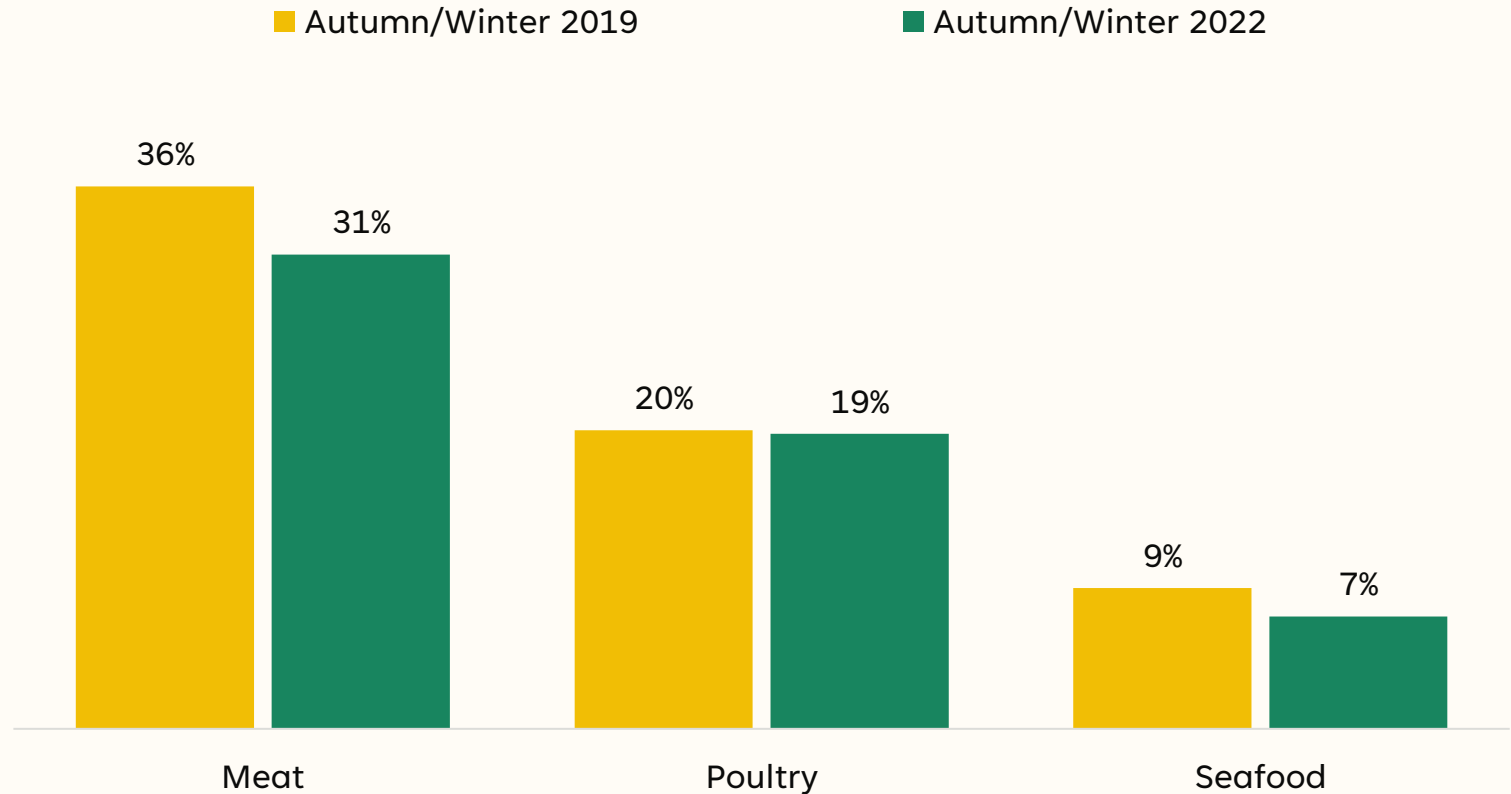
# Proportion of dishes containing meat declines from 2019

The total proportion of dishes containing meat has fallen across pubs & bars from 2019 to 2022. Operators are aligning with trends for plant-based diets whilst reducing the use of meat across menus, managing costs.

**NEW BUTTERNUT & SPINACH PASTA** Ve

Pasta shells in a spinach & butternut squash sauce topped with pumpkin seeds and served with garlic bread 536kcal 12.99

Harvester



Source: Lumina Intelligence Menu Tracker Tool, Lunch/dinner undefined day-part, Autumn/Winter 2022



# Key product trends in mainstream market – AW 2022



Retro foods are appearing across pub menus as operators seek to create feelings of nostalgia, part of an ongoing trend of delivering differentiated experiences. Korean flavours have been growing in popularity and are now more commonplace on mainstream pub menus.

## Retro foods

### TREACLE SPONGE v

With your choice of real dairy ice cream 550kcal, custard 551kcal or fluffy cream 554kcal 5.49

### NEW APPLE & BLACKBERRY CRUMBLE Ve

With your choice of vegan iced dessert Ve 746kcal, custard v 680kcal or real dairy ice cream v 679kcal 5.99

### NEW Jam Roly Poly 4.99

An old-school favourite. Served with either custard (496kcal) or vanilla ice cream (463kcal)

### NEW Orange Bread & Butter Pudding v 4.99

Our twist on a classic. Served with custard (524kcal) or vanilla ice cream (491kcal)

## Harvester

### Seasonal Home-Baked Sponge (v) - Jam Sponge

Baked in-house. Served with your choice of freshly whipped cream, dairy ice cream or custard. Ask your server for today's flavour

### Seasonal Home-Baked Sponge (v) - Spotted Dick

Baked in-house. Served with your choice of freshly whipped cream, dairy ice cream or custard. Ask your server for today's flavour

## Toby Carvery

## Brewer's Fayre

## Korean Flavours

### KOREAN LOADED FRIES v 9.45

Sliced buttermilk chicken, Korean bbq sauce, red onion kimchi & siracha mayo.

## BrewDog

### Korean BBQ Pork i

£14.00

Beef burger, Korean BBQ pulled pork, sriracha, mint mayo slaw, pickles. Also available as gluten free (878 kcals). (835kcal)

## Revolution

### PICK A SAUCE

Caribbean Ve (305 kcal)

NEW Korean BBQ Ve (224 kcal)

Smoky chipotle

Sweet chilli Ve (164 kcal)

Texan BBQ Ve (180 kcal)

buffalo Ve (82 kcal)

Hot hot hot v (69 kcal)

Peri Peri Ve (52 kcal)

NEW Chinese-style

SUPER SPECIAL TUESDAY

salt and pepper seasoning v (33 kcal)

Sweet potato fries v (410 kcal)

## Hungry Horse



## Pubs drive revenue through garden dining

Perry Hill Pub in South London, invested in a smoker to ensure that its over 200 cover garden can consistently serve customers using an outdoor BBQ. The pub can purchase cheaper cuts of meat and ensure the smoker and BBQ means that the quality is high, yet the price point can be kept low.

Award winning gastropub The Black Bull in Cumbria has a custom-made BBQ, fire pit and pizza oven to allow for a full kitchen service outside. Cooking over fire adds to the site's experience credentials and allows for a more informal service to the indoor menu.



*The Owl, High Beech, Essex*



*The Black Bull, Cumbria*

Lumina Intelligence, June 2023

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Top 20 Pub And Bar Brands By Outlets (11-20)

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