



# LOOKING FORWARD: Key trends impacting the UK Beer & Pub Industry

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**KAM**

# KAM

## Insight with purpose

So much more than just a research agency, KAM is the supportive voice of the UK hospitality industry, providing our clients with valuable and actionable insight that drives purposeful change.

HOW CAN WE HELP YOU?



Insights &  
Consultancy



Creating Insight-led  
Content



Learning &  
Development





***“The tech you use  
impresses no one.***

***The experience you  
create with it is  
everything.”***

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**Let's start with  
the PUBLICANS**

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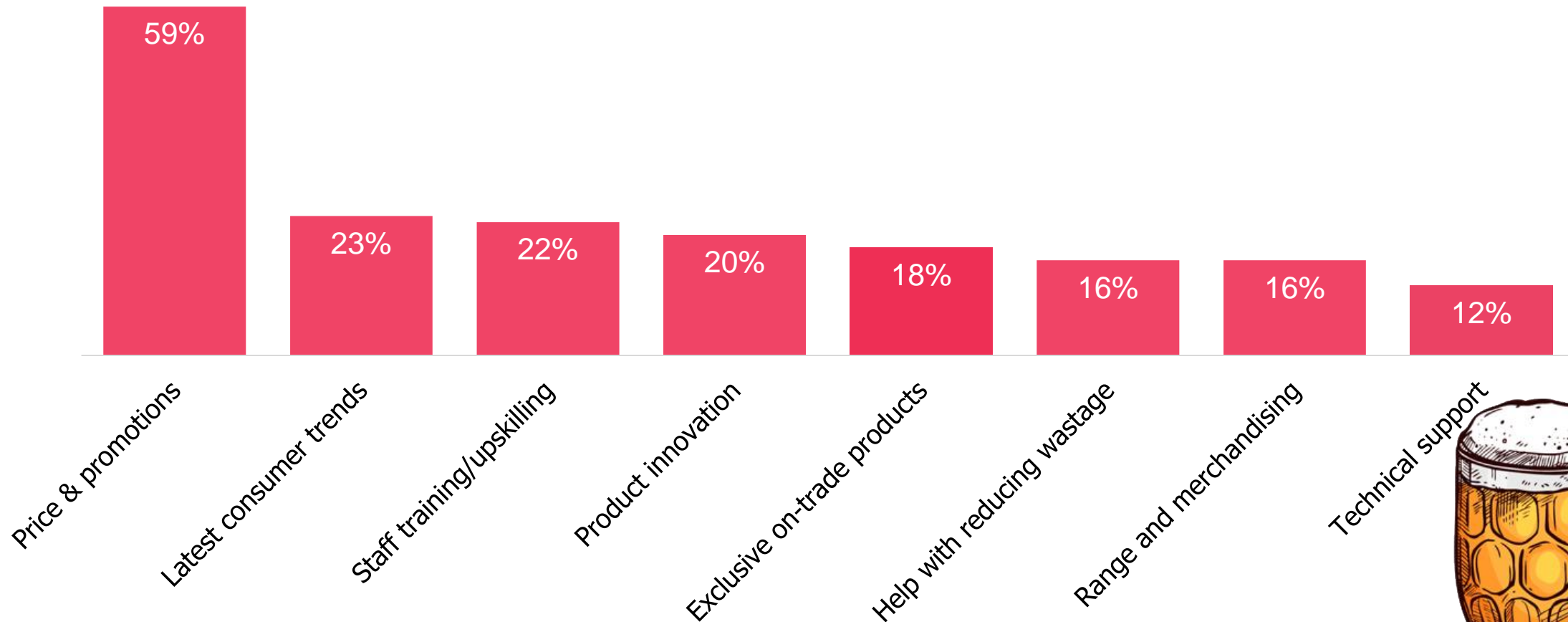
# PUBLICANS BIGGEST CONCERNS...



# WHAT DO PUBLICANS MOST WANT SUPPORT WITH FROM PUB COMPANIES?



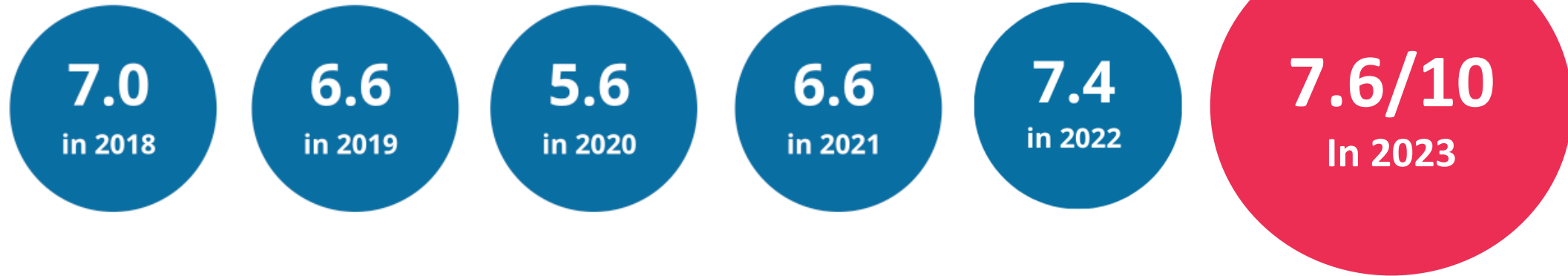
# WHAT SUPPORT DO PUBLICANS WANT FROM BRANDS AND SUPPLIERS TO DELIVER GROWTH?



# THE FUTURE LOOKS BRIGHT

## LEVEL OF OPTIMISM FOR NEXT 12 MONTHS:

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# PUB ROADMAP

The on trade outlook from UK  
pub customers and operators

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**BII**  
BRITISH INSTITUTE OF INNKEEPING

**brakes**  
a Sysco company

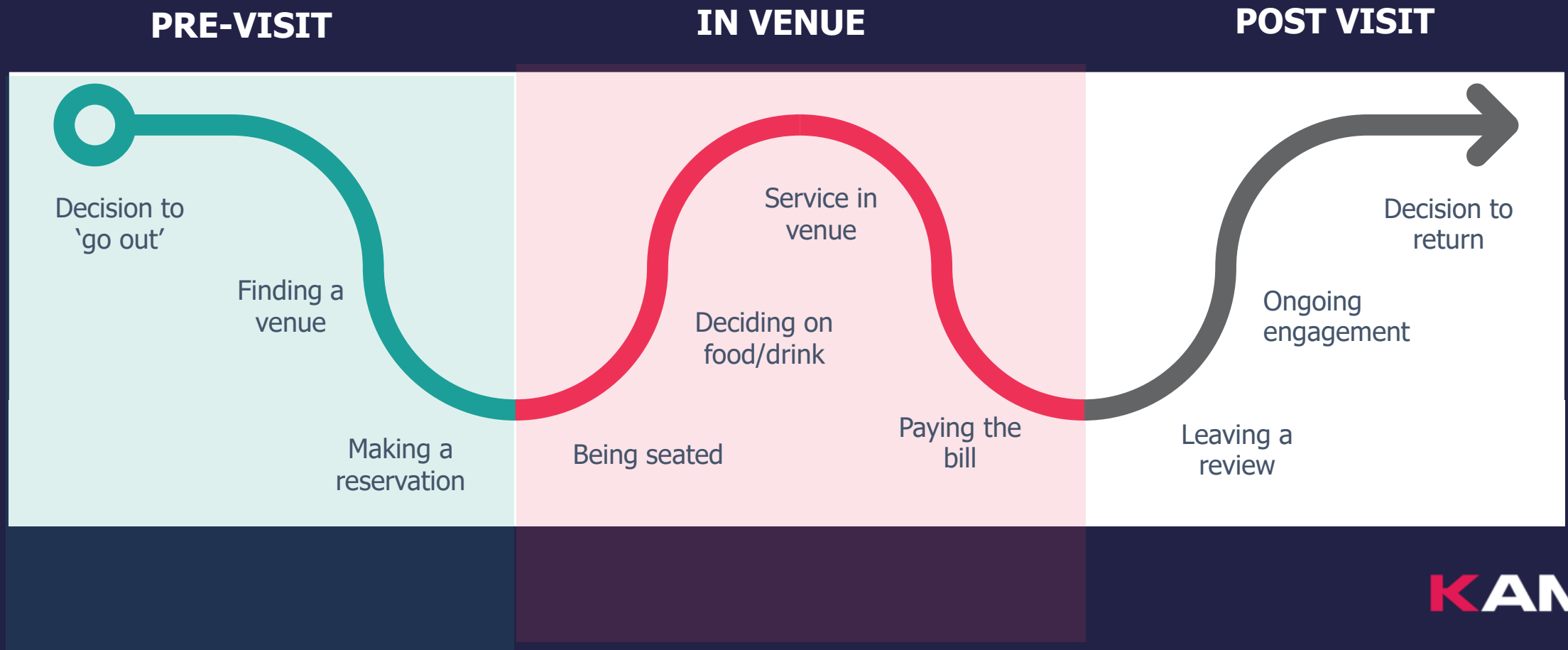
**hdi**  
MORE THAN DATA

**BRIXTON**  
LONDON BREWERY



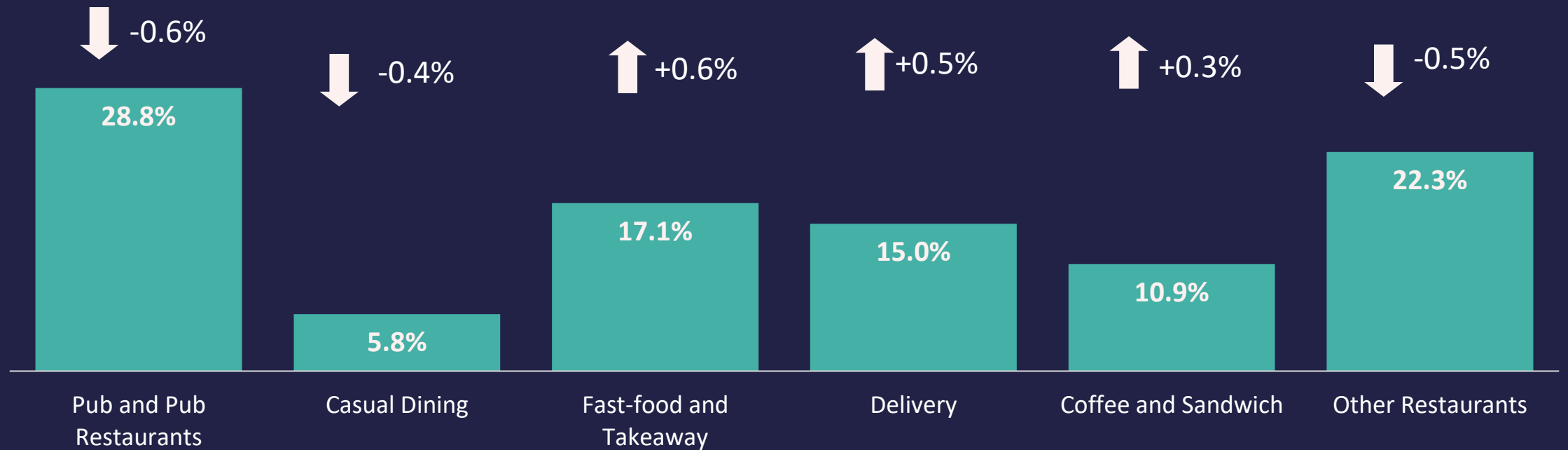
# THERE ARE SO MANY OPPORTUNITIES TO INFLUENCE (& IRRITATE!) YOUR CUSTOMER

(Tech *can* have a role across most touchpoints)



# WHERE ARE CUSTOMERS TAKING THEIR HOSPITALITY SPEND?

UK Hospitality Channel Shares and YoY Changes



Source: HDI Panel, 12 weeks ending 2/4/24  
- UK hospitality share of spend by channel and YoY change



# THREE KEY FOOTFALL BARRIERS

## Cost of living



**84%**

say wanting to save **money** prevents them from going out

## Health/ Moderation



**62%**

say wanting to be **healthy** prevents them from going out more often

## Home is where the heart is

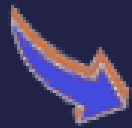


**53%**

are having 'social occasions' at home **more** now vs 12 months ago

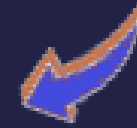
# HOW ARE OCCASIONS CHANGING?

Occasions  
in growth



- Drinks with family/friends
- Habitual meet-up with friends
- Watching live sports
- Lunch
- Live music
- Celebrations
- Coffee

Occasions  
in decline



- After work drinks
- Remote working
- Breakfast
- Business meetings
- Dinner



# WHAT'S THE CURRENT REALITY IN TERMS OF CUSTOMER EXPERIENCE?

(in the last 3 months)

**26%**

Noticed venue was short-staffed

**24%**

Menu items have been unavailable

**22%**

Taken too long for food/drink to arrive

# INFLUENCING FOOD / DRINK CHOICE

## 75%

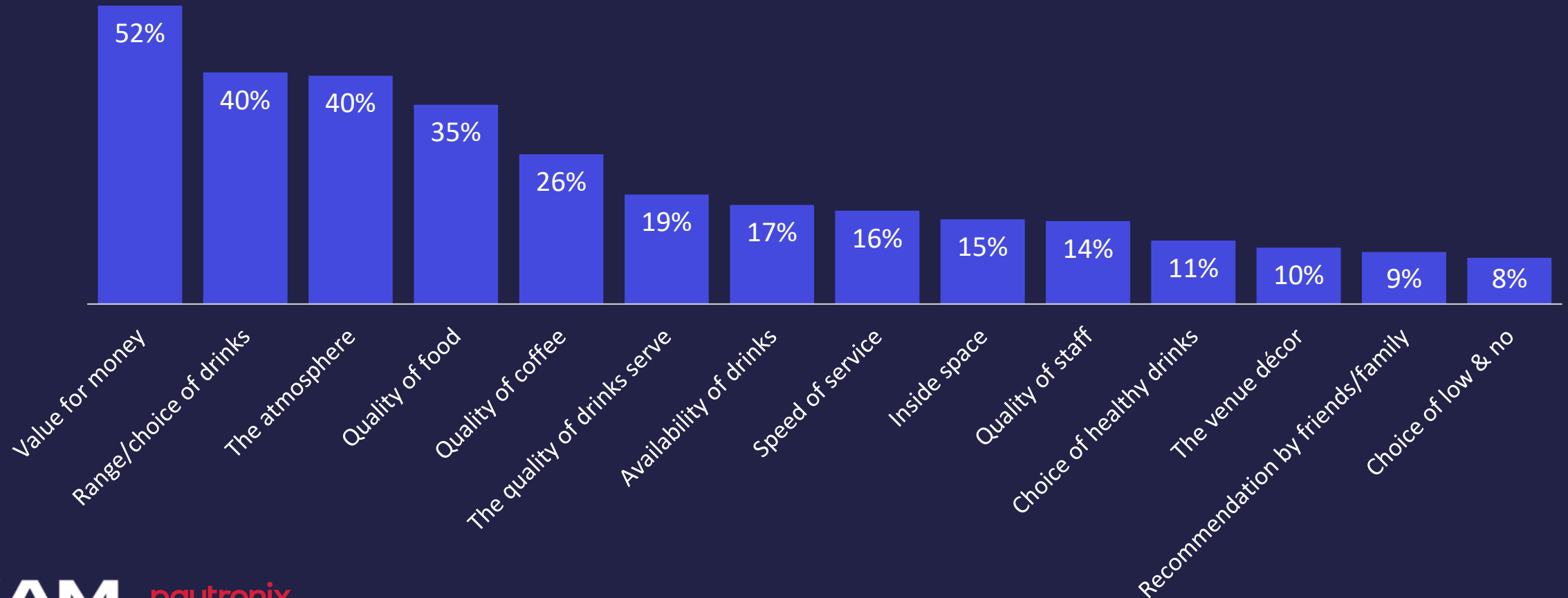
of customers make up their mind when they are IN the venue.

## 56%

will have also looked at food/drinks menu before arriving.  
(Even higher for GenZ and those with young kids.)

# Most important factors when choosing where to go for 'drinks'.

**PLAN TO PLATE.**





# DRINKING HABITS ARE CHANGING

Socialising is not as 'booze-centred'...  
particularly for GenZ

60%

Planning to moderate their alcohol intake over next 12m (v 50% ave)

1-in-10

have *LEFT a pub* in last 3 months due to lack of alcohol-free options



LOW+NO / 2024  
DRINKING DIFFERENTLY  
Weds 5th June - central London

KAM

PENTIRE  
vintners

GRUMPY  
MULE

SHRUBS  
MIX  
DRINKS  
MOCKTAILS

LUCKY  
SAINT

Club  
Soda

BUTCOMBE  
BREWERY Co.

INTEGRA

The poster features a photograph of two women smiling and holding drinks at a table. The background is dark blue with white and red text.

# PREMIUMISATION IS STILL RELEVANT

**82%**

Of pub customers would rather have a smaller portion of better-quality food than a large portion of poorer quality

**79%**

Of pub customers would rather have less drinks of a better quality, i.e. 2 pints of quality beer for the same price of 3 pints of beer of a poor quality

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**30%**

Of publicans actively encourage their staff to upsell/upgrade customers into more premium drinks/items on the food menu



# IT'S PERSONAL

**70%** Of pub customers say they want to be able to customise their food orders (52% for drinks) in pubs

**69%** Of pub customers would be happy to share their personal data with a pub if it meant they received more tailored offers and promotions

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**51%** Of publicans believe it's important for them to offer the ability for food/drink to be customised and personalised in their venue(s)



# IMPORTANCE OF SUSTAINABILITY

**75%** Of pub customers say that sustainability is important to them

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**71%** Of publicans say that sustainability is important to their pub

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**31%** Of pub customers believe that pubs are focussing on sustainability as a priority



# THE BUSINESS BENEFITS OF SAVING THE PLANET!



**36%** say that how sustainable a pub is impacts their decision to visit it



**46%** are more likely to return to a pub if support sustainability in their operation



**46%** would pay **MORE** for food/drink if they are sustainably sourced



# SUMMARY

- Shape of the market
- Experience is king/queen
- Brits are drinking differently
- Premiumisation is here to stay
- Personalisation makes a difference
- Importance of sustainability
  
- **Tech has a role to play but ONLY with a clear objective**



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