

# The Krumb: Pubs & Bars

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# Market Update

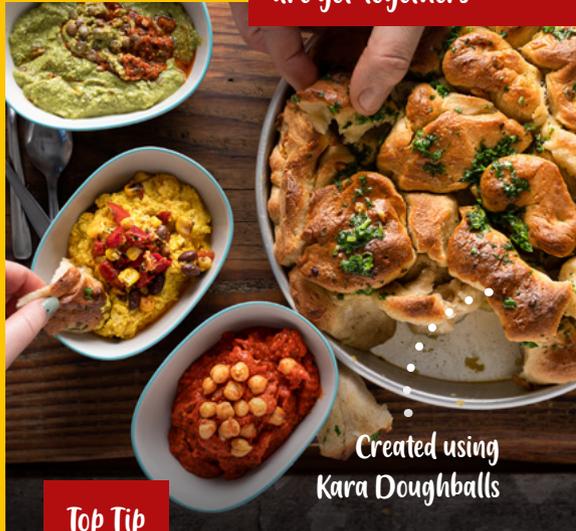
1. The UK pubs & bars market **declined in value by 60.6%** in 2020.
2. Pub and bar restaurant menus remain **14.5% smaller** than pre-pandemic.
3. The market is forecast to make a full **recovery by 2024** and exceed its 2019 value and to total **£23.4bn**.
4. Managed, branded and franchised pubs are set for the **strongest recovery** in 2021, with a greater proportion of sites able to capitalise on delivery and takeaway opportunities in the first half of the year.
5. A full year of non-restricted trading is forecast to see the **market grow by +52%** in 2022, but outlet decline and supply chain disruption will continue to drag recovery.
6. The shift towards using **ordering apps within venues** has driven higher spends and pushed premiumisation.



# Customer Insight

1. Almost **one in ten** UK adults had a pub/bar occasion in the WE 11 July 2021.
2. **2 in 5 occasions in a pub/bar are drink-only**. Premium alcoholic drinks including craft beers and cocktails are driving spend in the market.
3. **4 in 5 are satisfied with the value for money** they receive from pub and bar venue, however, meal and drinks discounts are key ways for pubs to drive incremental value and repeat visits.
4. **A third of consumers would like to continue using digital ordering and payment methods within venues**. Investment in service technology will be key growth drivers for pubs in the next 12 months.

36% of pub/bar visits are get-togethers



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## Top Tip

Pubs play a crucial role in the community for families and friends with social missions proving to be a key opportunity to encourage higher spends. Vendors should offer deals that offer **discounts for larger groups** as well as discounted meals for children; a great way to attract families.

# Dinner is the most important day part

**2 in 5**  
pub visits are for drinks only

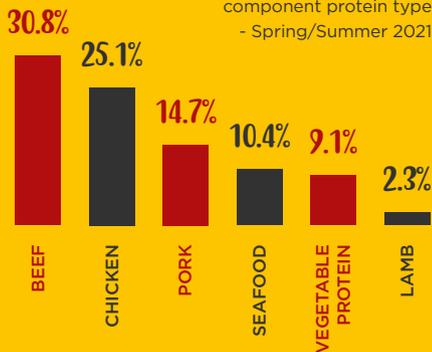
Pubs can capitalise at dinner by offering dinner and drink deals. This will encourage those on a drink only mission to purchase food as well.

**65%** ...of drinks bought and consumed in pubs and bars are alcoholic drinks.

**22%** ...of pub and bar visits are for lunch.

Boost breakfast and lunch sales by offering “work from home” lunch and Wi-Fi deals.

Proportion of mains by component protein type - Spring/Summer 2021



Over 30% of pub and bar mains have beef as a core protein. Chicken is the second highest protein across menus, offering benefits around relative cheapness, versatility and popularity among consumers.



# Burger and chips is the No.1 dish served in pubs

Kara Gourmet Brioche

1 in 5 non-alcoholic drinks  
consumed are coffee



61% of alcoholic drinks  
consumed are beer



Average burger spend is £16.80

21%

...of consumers agree that meal discounts encourage them to visit pubs - this is a key way to offer incremental value and repeat visits.

# Technology

The shift towards using ordering apps within venues has driven higher spends and pushed premiumisation.

.....

*A third of consumers would like to continue using digital ordering and payment methods within venues.*

.....

Apps which allow ordering can also be used to facilitate and aid with social distancing thus encourage loyalty and repeated visits and attract younger consumers.





*Using a mobile app/QR code to order from the table in pubs and bars...*



*is more convenient than ordering at the bar from staff.*



*limits unnecessary contact with others.*



*is faster than ordering at the bar.*

Having digital menus are a key opportunity for pubs to capitalise on upselling products. Customers have agreed that they find browsing the menu much easier in an app, with 1 in 5 also browsing the menu for longer when it is in a digital format.

At least 2 in 5 consumers agree or somewhat agree that mobile apps or QR codes are more convenient, faster than ordering at the bar and limit unnecessary contact with others. Pubs and bars should emphasise these benefits with marketing and signage on site to encourage consumers to use newly launched digital systems.

Greene King has reported that 70% of orders were taken using its app, and Mitchells and Butlers has reported that app usage correlated with higher spend per head and premiumisation throughout the summer.

# Must Have Menus

Dietary tags have increased on menus, with gluten free seeing the highest increase in share on menus.

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.

Go Gluten Free



Sharing is Caring



Value-led pubs have introduced the highest amount of sharing dishes in 2021.

With concerns around hygiene lessening, operators are continuing the pre-pandemic trend of a more Mediterranean style, plant based and Asian inspired ways of eating in sharing dishes which encourage upsell.

# The Fantastic Four

Four food trends to drive the future of pubs and bars.

Development Expectations for food-led pubs, 2021-2024.

1. Pubs will focus on using more **locally sourced or British produce** in their menus to control rising costs and supplier disruption and tap into sustainability and local provenance trends.
2. The rise in outdoor space will see a **rise in outdoor cooking** techniques such as BBQ and street food offerings as well as pizza ovens.
3. There will be a greater focus on **plant based options** that have a broad appeal as more consumers embrace the flexitarian trend.
4. There will be greater **emphasis on non-traditional day-parts** including Sunday lunch, brunch, afternoon tea and all day working from home deals.



