

DELEGATE LIST:



KAM

PUB SPOTLIGHT 2026

#PubSpotlight



Kokebi



TYNANT

BUTCOMBE
— GROUP —



24social.



Damm



Coca-Cola
EUROPACIFIC
PARTNERS

LUCKY
SAINT

UNITY
CONSISTENTLY RAISING THE BAR



Say hello to **KAM**



A boutique research and insights consultancy dedicated to the hospitality sector, offering tailored and creative **insight-centred solutions**.



Bespoke
research
& Insights



Amplified
insight-led
content



Consultancy
& expertise



Learning &
development

**YARD
SALE
PIZZA**

NQ64
ARCADE BAR

LINA STORES

TURTLE BAY
Caribbean social

**FLAT
IRON**

Bidfood

**VARIOUS
EATERIES**

brakes
a Sysco company

PUNCH
PUBS & CO

BII
BRITISH INSTITUTE OF INKKEEPING

We've spoken to licensees, head office teams, frontline teams AND pub customers...

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THE LICENSEE INDEX



OPERATOR MANAGED INDEX



The day ahead



- The **publican** perspective
- The **pub employee** perspective
- 11.20am – Break
- The **pub customer** perspective
- The **future** perspective
- 1.20pm - networking drinks reception

DELEGATE LIST:



The **Publican** Perspective.



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PUB

SPOTLIGHT 2026



The **Publican** Perspective.

Katy Moses

Founder/MD, KAM

KAM



THE LICENSEE INDEX

- >1.1K licensees interviewed
- 16 pub companies
- Feedback across 70 criteria
- Oct-Dec 2026

OPERATOR MANAGED INDEX

- 335 operator-managers interviewed
- 5 pub companies
- Feedback across 40 criteria
- Oct-Dec 2026



WHY THEY DO WHAT THEY DO

THE LICENSEE
INDEX

MOTIVATION FOR RUNNING A PUB:

50%

"To run a profitable business"

19%

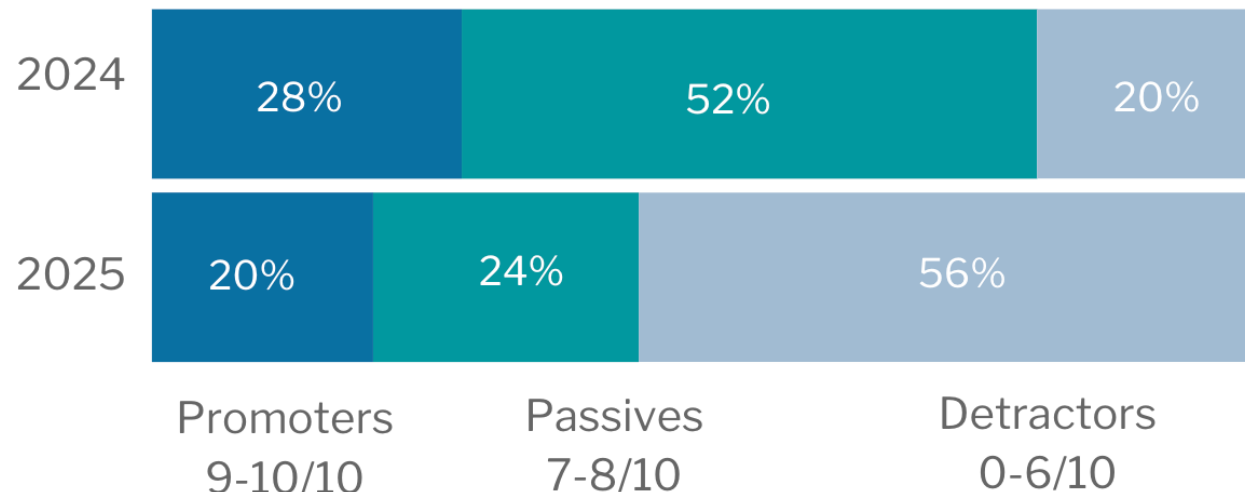
"To be the centre of the community"



WOULD THEY RECOMMEND 'PUB LIFE'?

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LIKELIHOOD TO RECOMMEND BECOMING A PUBLICAN



Source: KAM: The Licensee Index



PUBLICANS' BIGGEST CONCERNS...

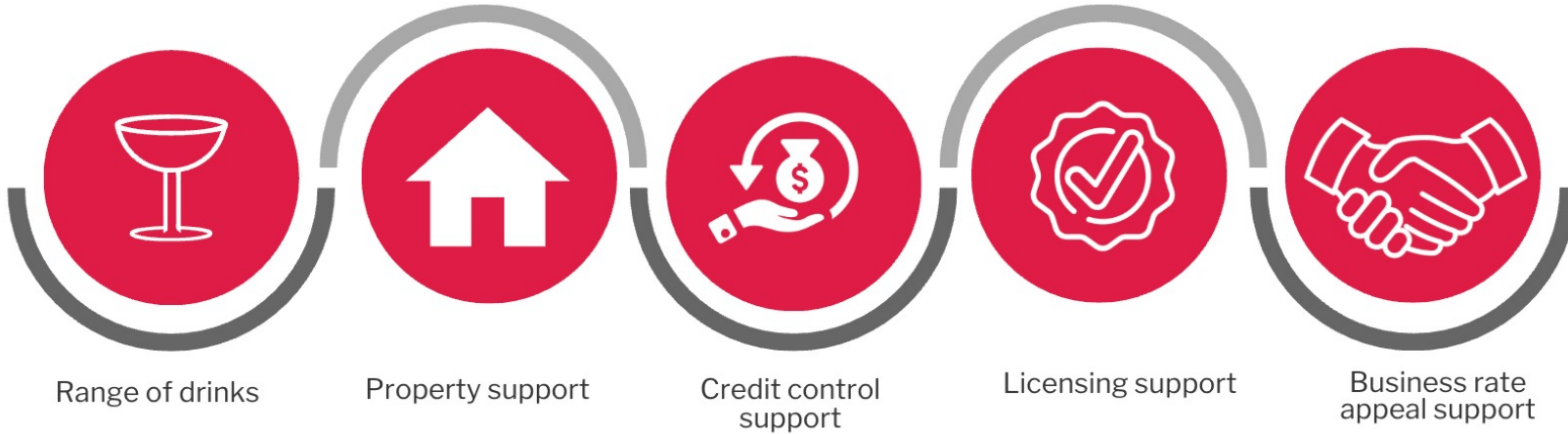
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		2025	2024	
1.	Utility cost inflation	64%	63%	
2.	Tax burden on pubs	60%	57%	
3.	Other cost inflation	59%	45%	↑
4.	Cost of living (people going out less)	55%	42%	↑
5.	Employment costs	54%	56%	



WHAT'S *MOST IMPORTANT* FOR PUB COMPANIES TO GET RIGHT?

THE LICENSEE
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Significant improvements
in satisfaction rating YoY



WHERE ARE PUB COMPANIES 'WINNING'?

THE LICENSEE
INDEX

1.

The ordering process



Improvements in
satisfaction rating YoY

2.

Accuracy & timeliness of deliveries



3.

Frequency of communication

4.

Understanding my customer base



5.

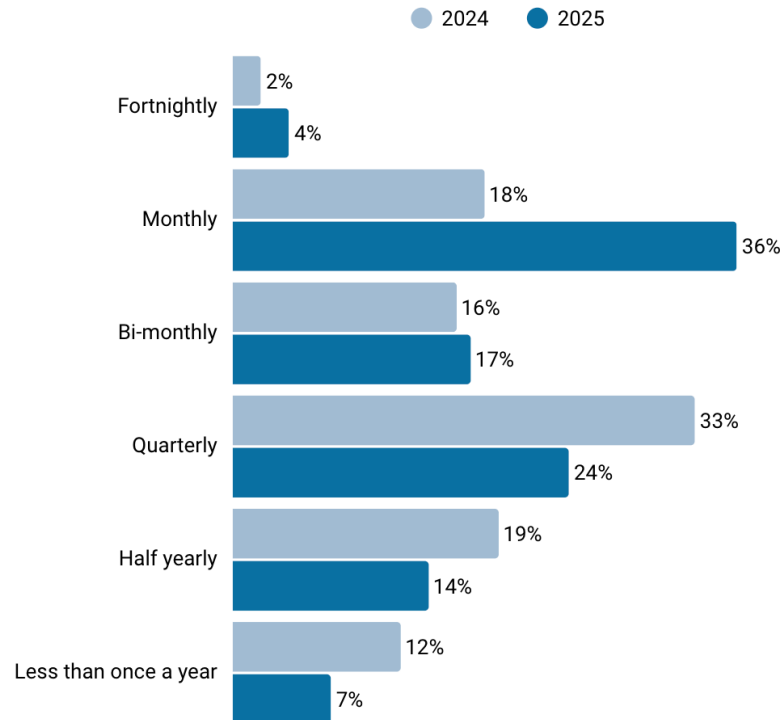
Overall quality of BDM



BDMS ARE BECOMING A MORE VISIBLE PART OF PUB LIFE

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PERCEIVED FREQUENCY OF BDM VISITS



AREAS FOR IMPROVEMENT...

THE LICENSEE
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Criteria receiving the lowest satisfaction ratings:

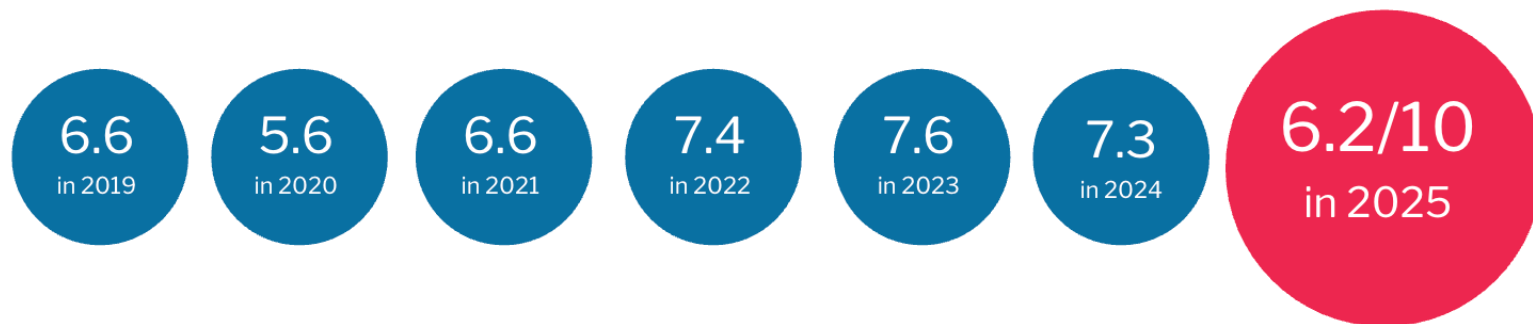
- Support with training in technology
- Support with community initiatives
- Integration of technology
- Support with events in my pub
- Implementation of technology



OVERALL OPTIMISM FOR THE FUTURE IN THE INDUSTRY HAS FALLEN

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LEVEL OF OPTIMISM FOR NEXT 12 MONTHS:



(7.9/10 for Op Man pubs
vs 9.1/10 in 2023*)



The **Publican** Perspective.

Emma Gibbon - The Plough

Tim Skinner – The Devonshire Arms

Colin Meakin – Inn for a Penny & The Hayloft

With **Katy Moses**, KAM

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The Pub Employee Perspective.

Jo Lynch

Account Director

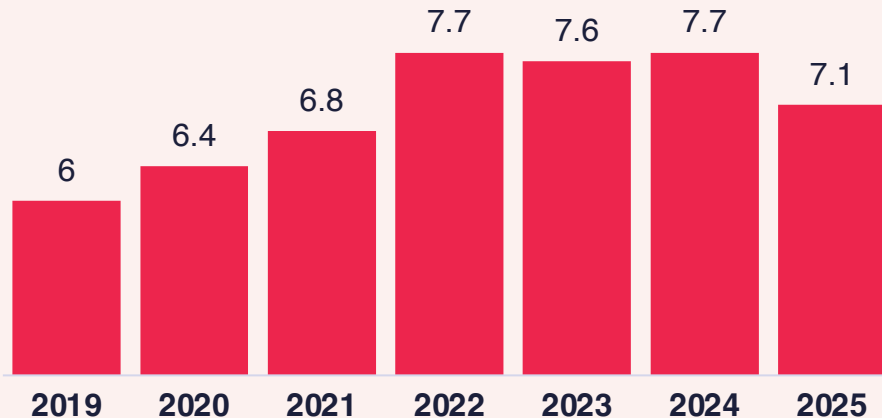
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Licensees want help with training for themselves AND their teams

THE LICENSEE
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How important is it that your pub company supports you with training for you and your team (out of 10)



How satisfied are licensees with current level of support from their pub company?

6.7/10

(8.2/10 in OpMan pubs)

Happy teams = happy customers.

Various studies show:

Companies with more engaged & satisfied employees/partners have...

- ✓ Higher productivity
- ✓ Lower turnover
- ✓ Lower absenteeism

And they *ALSO* have customers who...

- ✓ Spend more
- ✓ Visit more frequently
- ✓ Are more loyal
- ✓ More likely to forgive mistakes
- ✓ More likely to actively advocate

Are pub teams getting the right training?

38%

of pub staff felt 'very well'
prepared to do their job after
initial training/onboarding

*(vs 46% other hospitality
workers)*

What pub teams want more of...

More hands on training or
shadowing opportunities

42%

Ongoing support beyond
the first few weeks

31%

Longer onboarding period

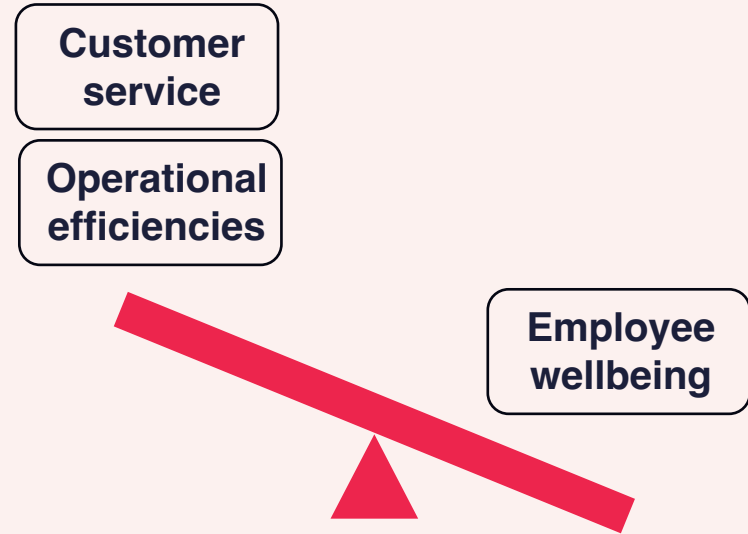
21%

What changes would pub employees like to see in their current role?

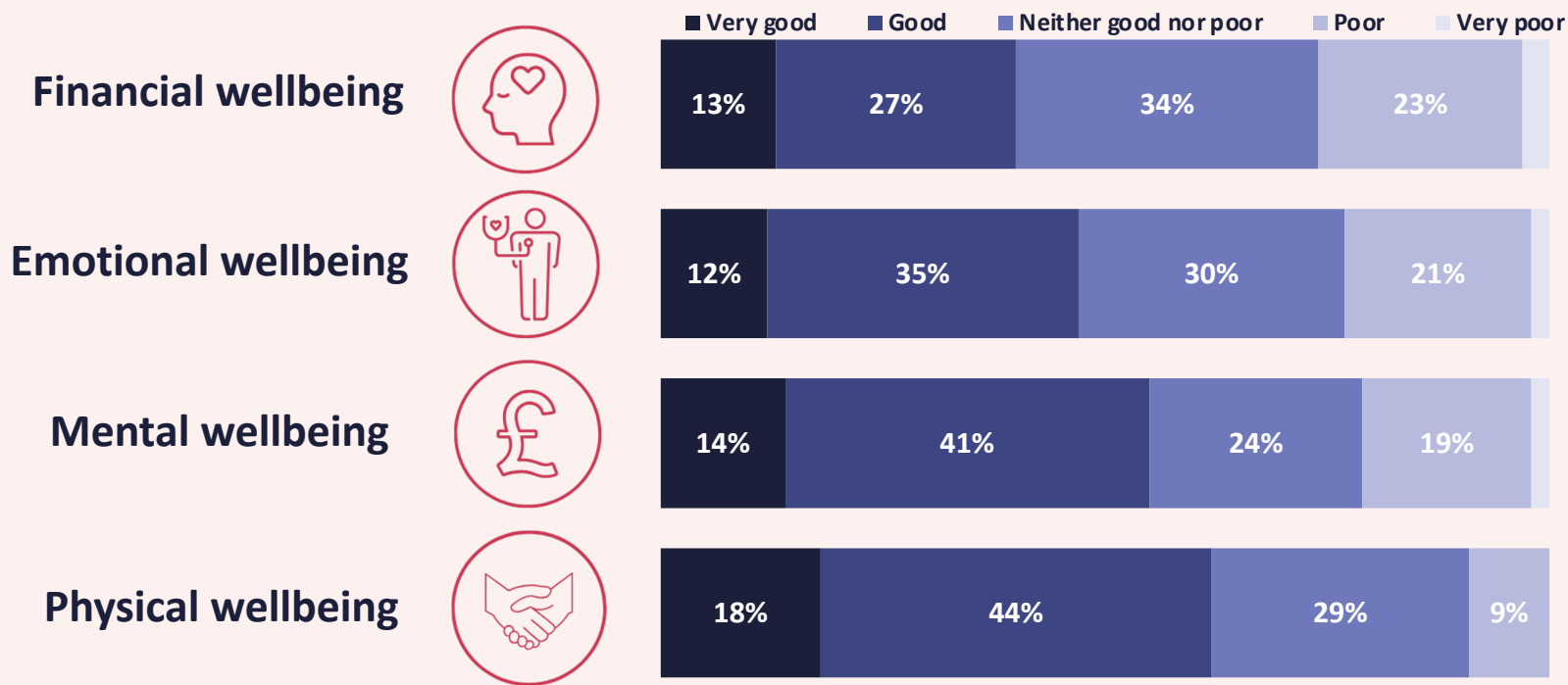


Do industry employees feel valued?

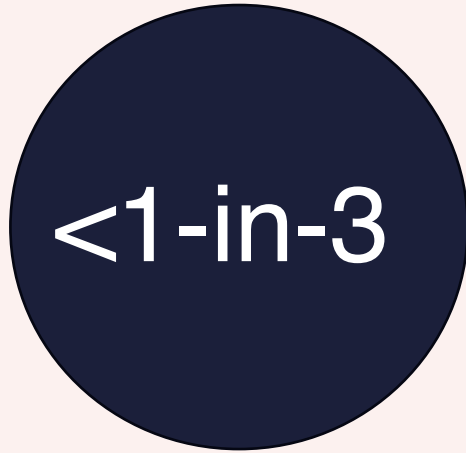
66%
think 'customer
service' & 'operational
efficiencies' are
more valued by
their business than
'employee wellbeing'.



How do pub employees currently rate their *overall wellbeing* at work?



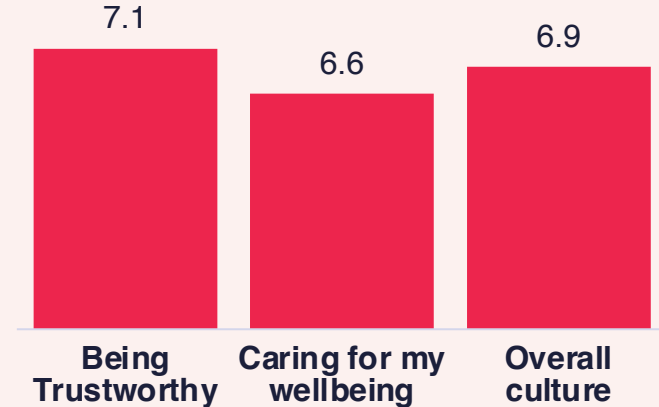
Do pub employees feel supported?



pub employees think their
workplace actively ***promotes a
culture of wellbeing***

Do licensees feel supported?

How do you rate your pub company
for the following (out of 10)



Employees AND employers agree that improving team wellbeing in the industry will have a 'significant impact' on business...

Staff
retention
73%

Staff morale
& motivation
73%

Customer
service quality
65%

= Happy staff
Happy customers
Happy sales figures

"If our wellbeing was better, we'd be better at serving our customers."
EMPLOYER

The Pub Employee Perspective.

Steve Alton, CEO, BII

Laura Cavendish, Group People Director, Punch Pubs

Greg Sergeant, Customer Experience Manager, Star Pubs
with Jo Lynch, KAM



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The Pub Customer Perspective.

Katie Jenkins

Marketing Director

KAM



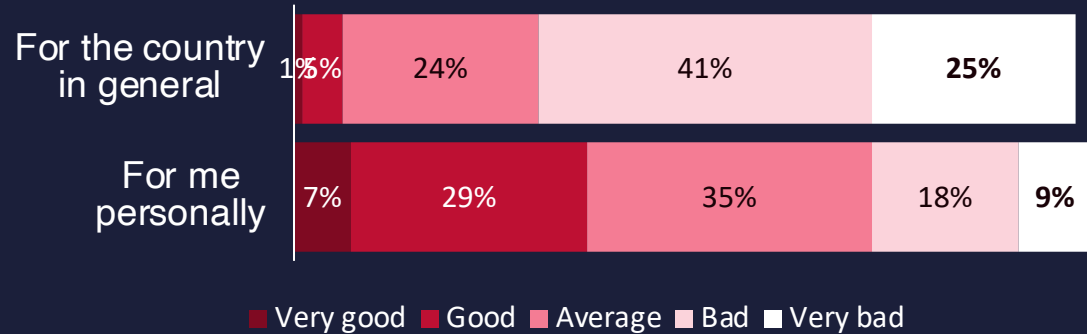
How are we Brits feeling right now?



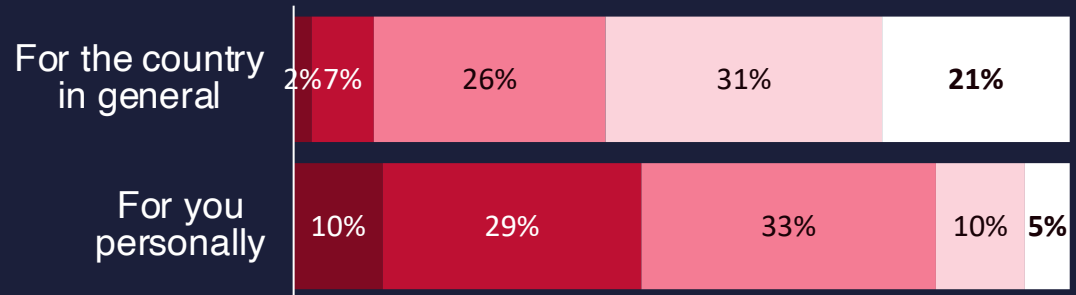
GenZ?
Happier
But more
likely to be
BORED!

How positive are Brits about the year ahead?

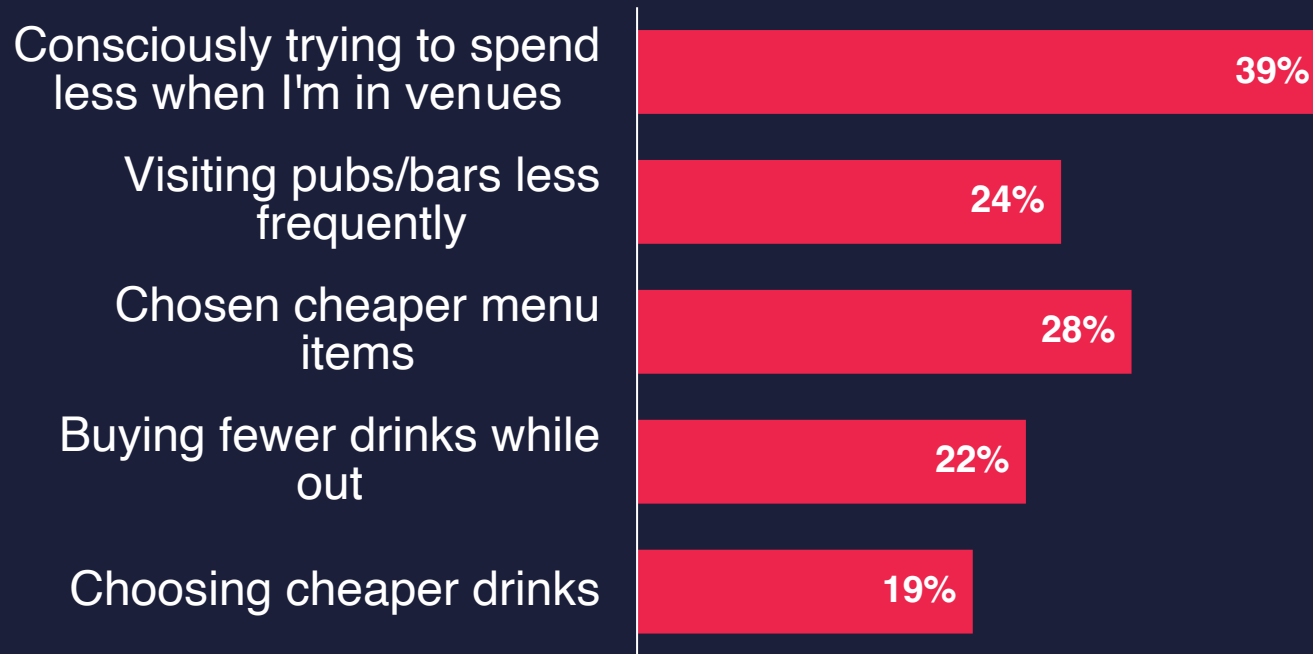
Was 2025 a good or bad year?



And expectations for 2026?



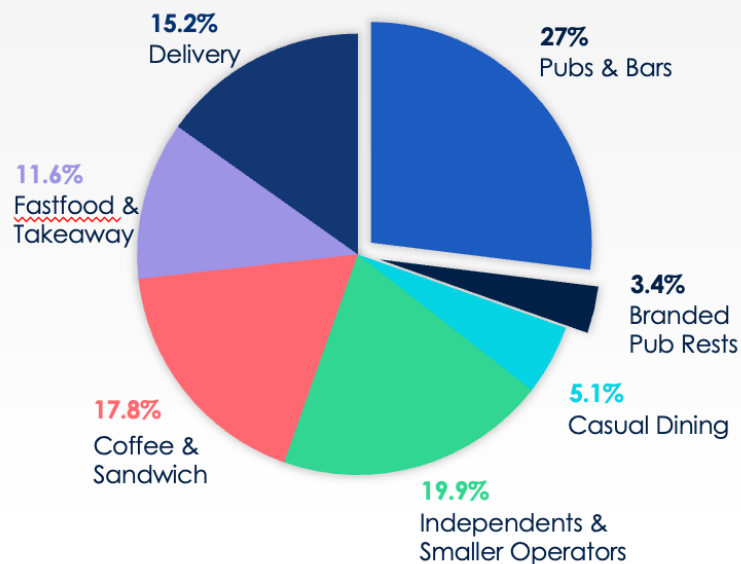
Changes in spending habits have hit hospitality but things are improving.



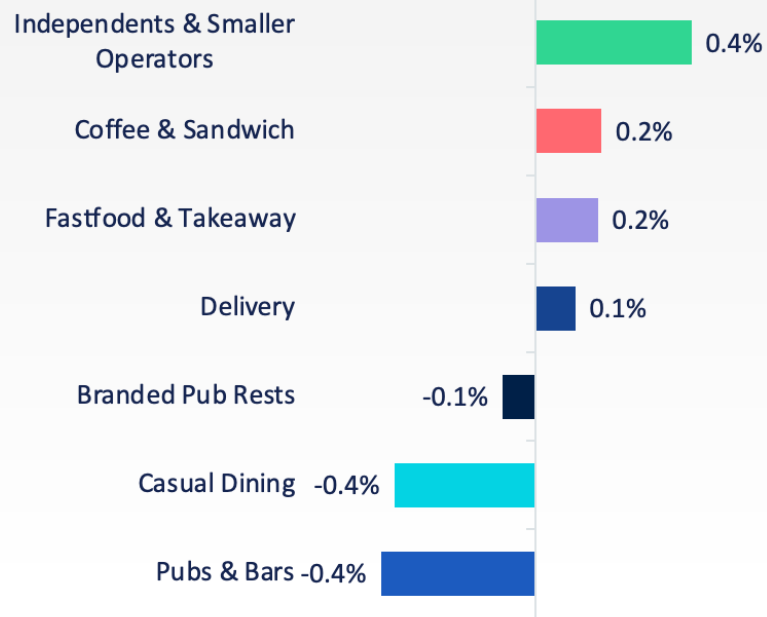
Where are hospitality customers spending their money?

UK HOSPITALITY BREAKDOWN

Customer Share of Wallet



SHARE OF WALLET CHANGE VS. 2024

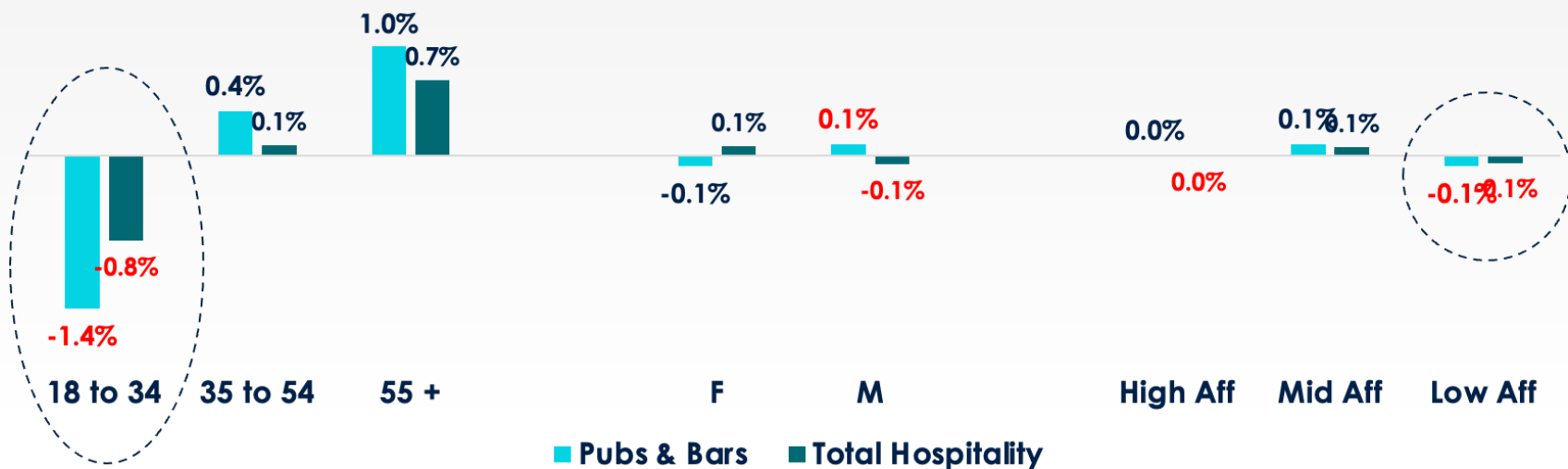


Source: HDI Panel - Customer Share of Wallet by Sector of UK Hospitality, Full Year 2025 VS. 2024

What's driving the shift in pub spend?

PUBS & BARS VS. TOTAL UK HOSPITALITY

YoY % Spend Mix Change

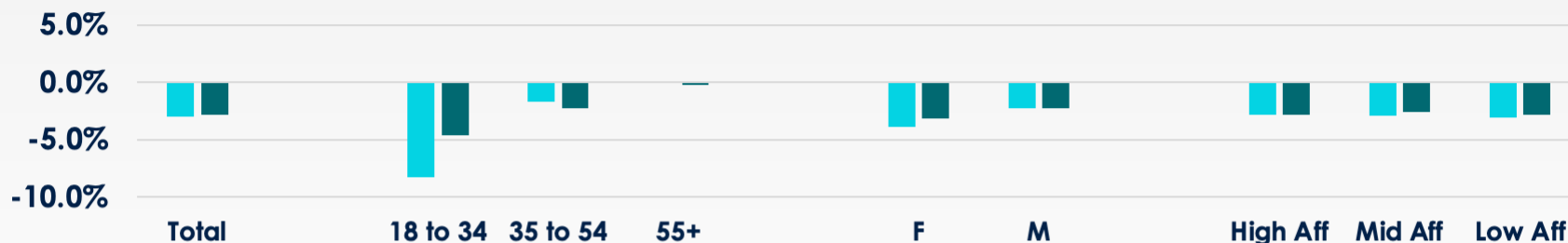


Source: HDI Panel - YoY % Spend Mix Change
Hospitality - Full Year 2025 VS. 2024

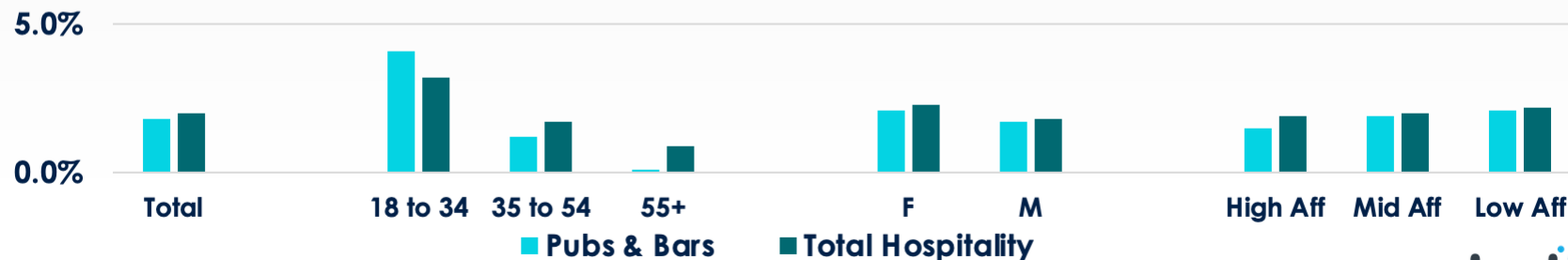
Declining visit frequency

PUBS & BARS VS. TOTAL UK HOSPITALITY

YOY % Change in Frequency

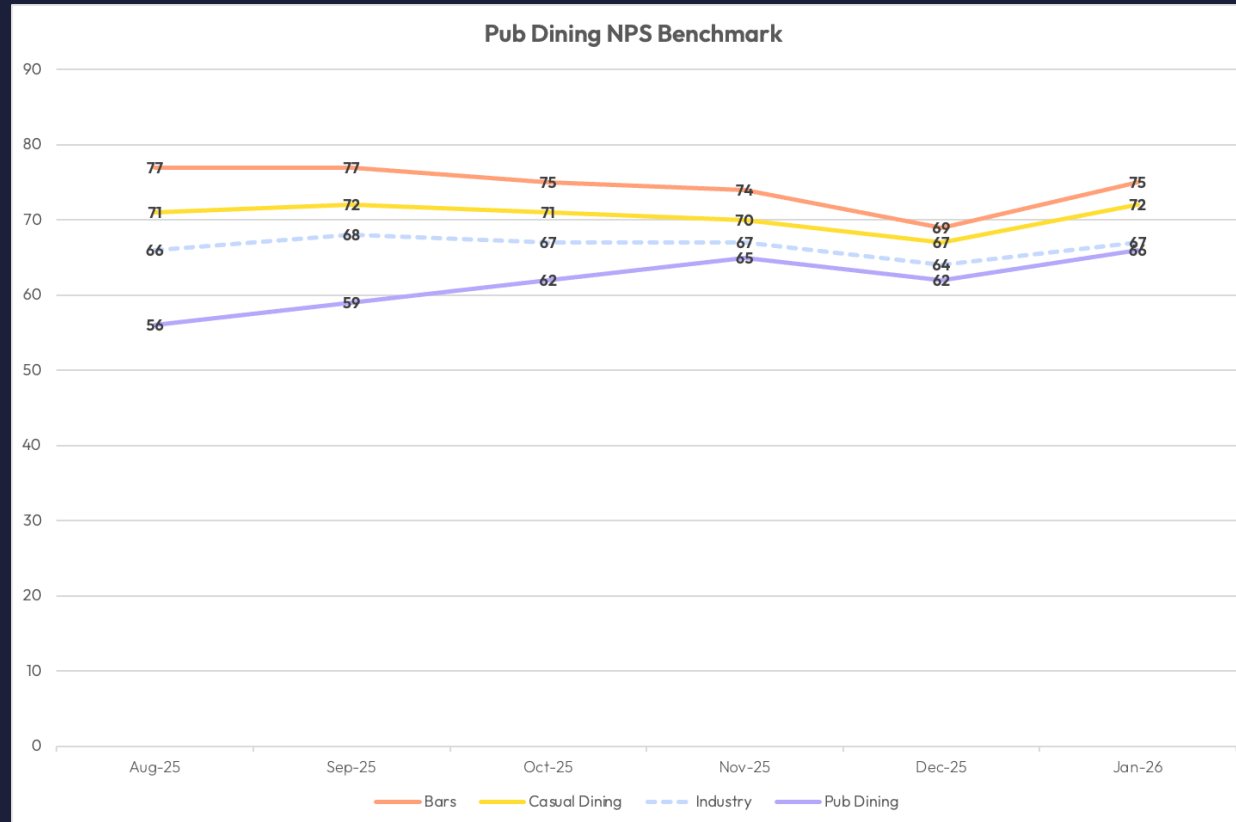


YOY % Change in Average Transaction Values (ATV)



Source: HDI Panel, % Change vs. Total UK Hospitality – Full year 2025 vs. 2024

How do pubs compare?



What/who are pubs competing against?



- Less 'free leisure time' - 3hr39m from 4hr17m

- Cost of living crisis



- Home-tainment / delivery

- *Social* experiences (wow factor)

- Growth in activity-led occasions



- Less booze-led socialising (choosing different venues/leisure activities)

Our relationship with alcohol has changed for MANY Brits



36%

Say it's less acceptable now amongst their peers to 'get drunk'

56%

Say there is less stigma now around not drinking alcohol when going out than there used to be

61%

Say that moderating their drinking doesn't stop them going out as much as they would do normally

Another growing trend is impacting consumption habits...

GLP-1s. The Jab. The Fat Jab. Ozempic. Mounjaro

- Grocery sector has lost an estimated £136 million in food and drink spending* ...
- 32% of users say they're **going out to eat/drink LESS** often
- 57% of users are more likely to go out for special occasions *only*
- 23% of users say they **drink less alcohol** when out



Why should hospitality venues care?

4-7% of UK adults

are *currently* using
GLP-1 drugs for weight loss
(2.1m to 3.7m)

vs c.7% vegetarian
c.3% vegan
c.1-4% wheat allergy

Use has DOUBLED vs last year

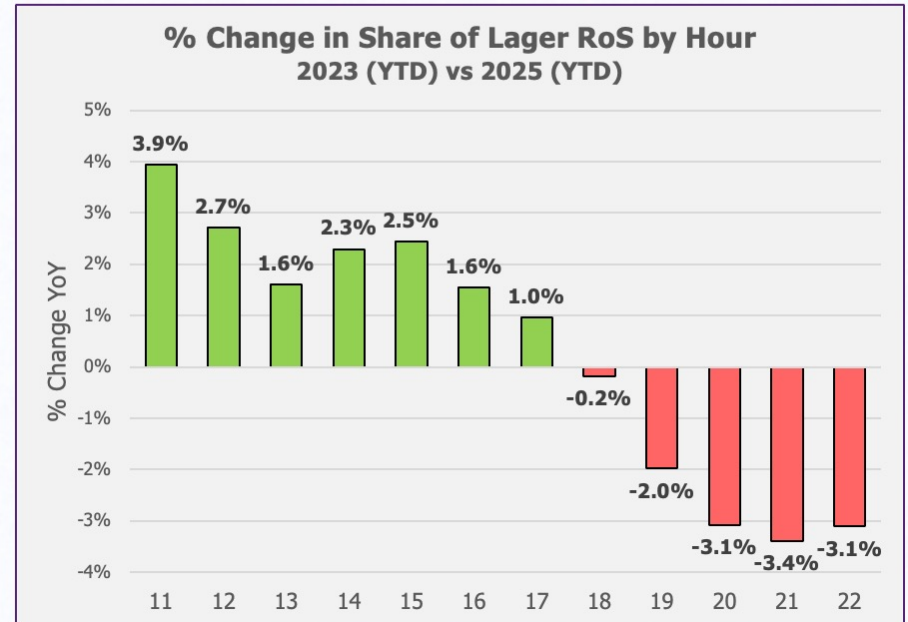
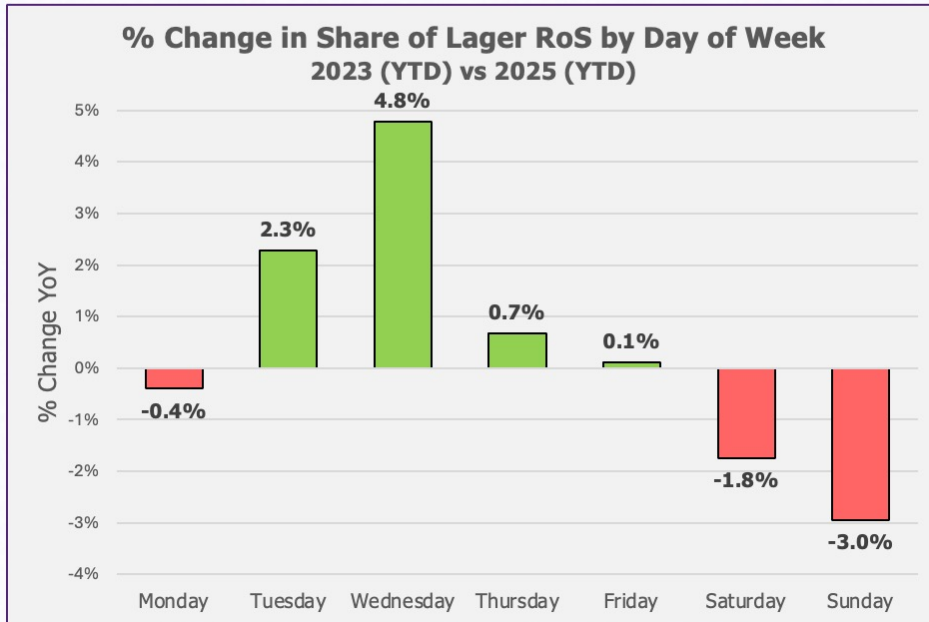


Earlier in, earlier out

OXFORD
PARTNERSHIP

MARKET WATCH™

Lager RoS Share Change Data by DOW & Hour



Digital discovery is shaping where people go



NB. Licensees want/expect support and advice from their pub companies for digital and social marketing... this is an area licensees think we're under-delivering on.

Brits are still social animals



66%

say that the main reason they go out to a pub, bar or restaurant is to socialise with friends/family/colleagues, etc.

2nd

10%

To experience an atmosphere you can't replicate at home

3rd

8%

To meet new people

4th

6%

To drink alcohol

Licensees want help understanding market & consumer insights...

THE LICENSEE
INDEX

What's MOST important that your pub company offers support for:

1. Range of drinks supplied
2. Property support
3. Your range of drinks
4. Licensing support
5. Credit control support
6. Business rate appeal support
7. Market & consumer insight support

How satisfied are licensees with current level of support from their pub company?



6.9/10

The **Pub Customer** Perspective.

Laurence Brown, Head of Insights - Stonegate

Louise Fleming, Head of Guest & Retail Insights - Punch Pubs

Kiran Quinn, Group Marketing Director - Red Cat Hospitality

With Jo Lynch, KAM



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The **Future** Perspective.

Julie Jolly, Central Operations & Compliance Director - Greene King

William Lees-Jones, MD - JW Lees

Andrew Turner, COO - St Austell

With Katy Moses, KAM



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Dates for the diary...

30th Mar – 1st March
**The Pub Show
+ Pub Roadmap**



Weds 6th May
**LTC Wellbeing
Conference**



Thurs 26th June
Low+No 2026



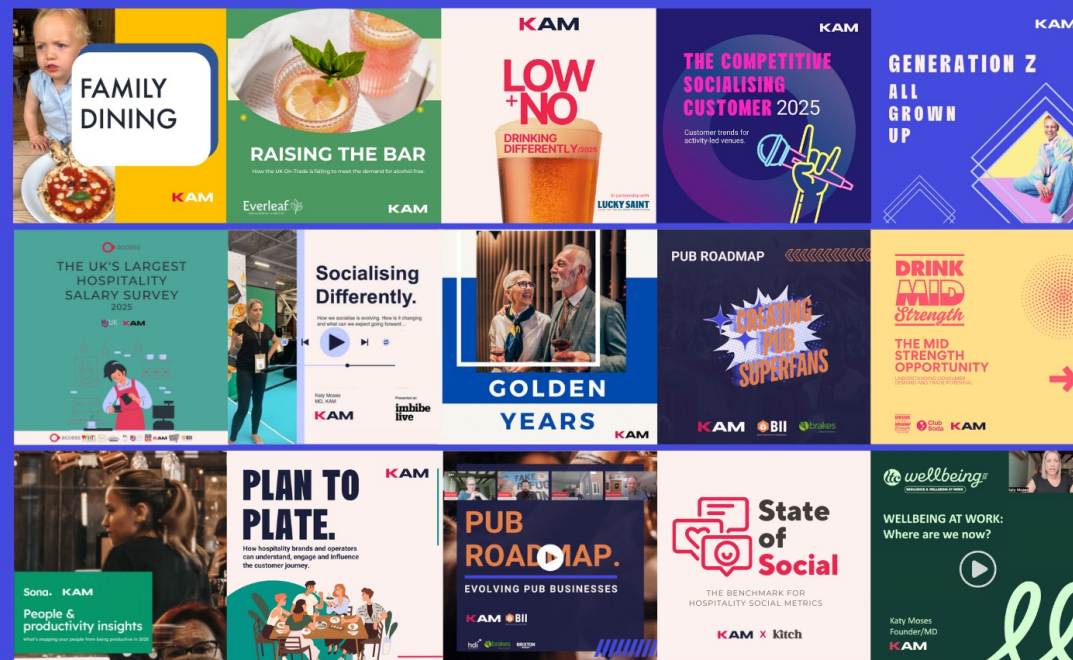
THE KNOWLEDGE HUB



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Get informed on the latest hospitality trends with the KAM Knowledge Hub. From in-depth trend reports and whitepapers to infographics, webinars and expert opinion, we deliver the data and trends you need to stay ahead - all in one place. One login, endless insights.

Scan the QR code above for FREE standard access or upgrade to an 'Access All Areas' pass (£595/yr) for even more eye-opening data and insights!



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Thank you
for joining us.

