

DELEGATE LIST:



KAM

# PUB SPOTLIGHT 2026

#PubSpotlight



# 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



LINA STORES

TURTLE BAY  
Caribbean social



VARIOUS  
EATERIES



PUNCH  
PUBS & CO



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

**KAM**

## THE LICENSEE INDEX

admiral TAVERNS      Brakspear ESTABLISHED 1779      FULLER'S      GREENE KING      HALL & WOODHOUSE      JW LEES

McMULLEN BREWING AND PUBS      PUNCH PUBS & CO      ROBINSONS BREWERY 1838      SHEPHERD NEAME SINCE 1799      STAR PUBS      STAUSTELL BREWERY 1881

Stonegate Group      DANIEL THWAITES ESTABLISHED 1867      WADWORTH



## OPERATOR MANAGED INDEX

PUNCH PUBS & CO      HIVE PUBS BY GREENE KING

PROPER PUBS

STAR PUBS

CRAFT UNION MORE THAN A PUB

THE UK'S LARGEST HOSPITALITY SALARY SURVEY 2025

LTC Wellbeing Research

People & productivity insights

KAM



# 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.



KAM

# 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

## MOTIVATION FOR RUNNING A PUB:

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50%

"To run a profitable business"

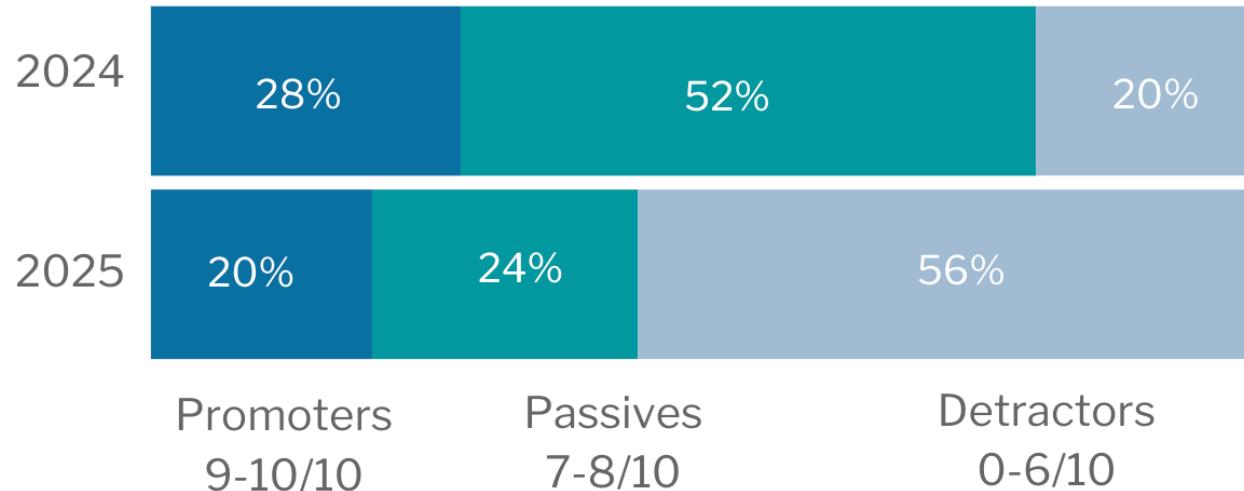
19%

"To be the centre of the community"



# WOULD THEY RECOMMEND 'PUB LIFE'?

## LIKELIHOOD TO RECOMMEND BECOMING A PUBLICAN



# PUBLICANS' BIGGEST CONCERNS...

THE LICENSEE  
INDEX

		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  
INDEX



Range of drinks



Property support



Credit control  
support



Licensing support



Business rate  
appeal support



Significant improvements  
in satisfaction rating YoY



# WHERE ARE PUB COMPANIES ‘WINNING’?

THE LICENSEE INDEX

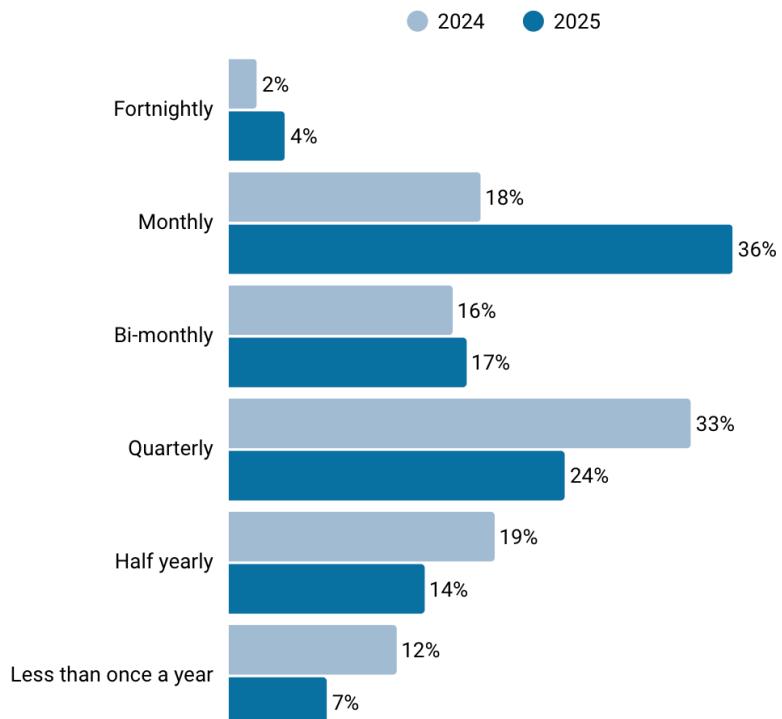
1. The ordering process  Improvements in satisfaction rating YoY
2. Accuracy & timeliness of deliveries 
3. Frequency of communication 
4. Understanding my customer base 
5. Overall quality of BDM 



# BDMS ARE BECOMING A MORE VISIBLE PART OF PUB LIFE

THE LICENSEE INDEX

## PERCEIVED FREQUENCY OF BDM VISITS



# AREAS FOR IMPROVEMENT...

THE LICENSEE  
INDEX

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

## 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

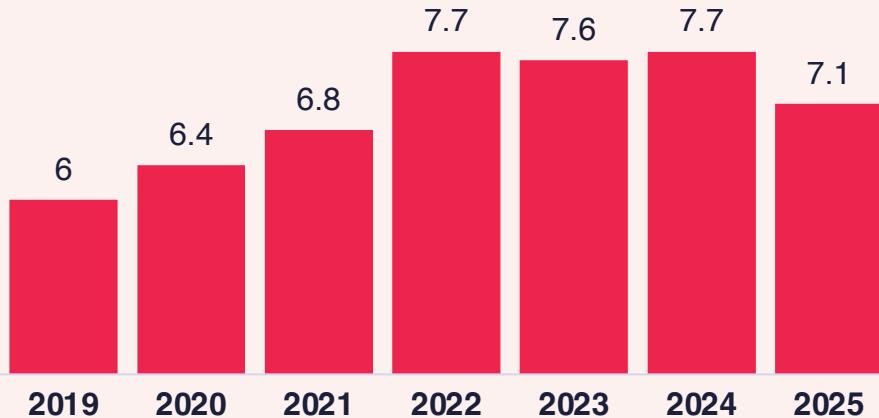
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# Licensees want help with training for themselves AND their teams

THE LICENSEE INDEX

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?



# 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

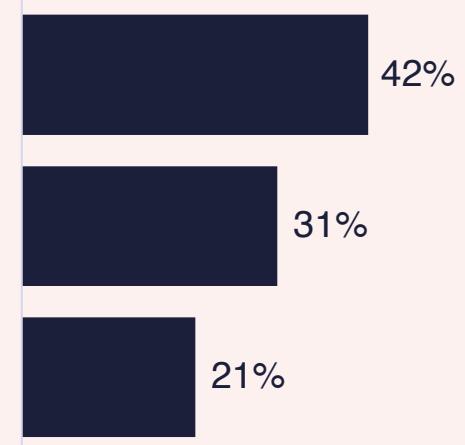
*(vs 46% other hospitality workers)*

## What pub teams want more of...

More hands on training or shadowing opportunities

Ongoing support beyond the first few weeks

Longer onboarding period



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

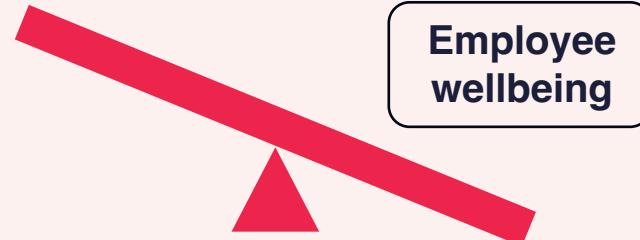


# Do industry employees feel valued?

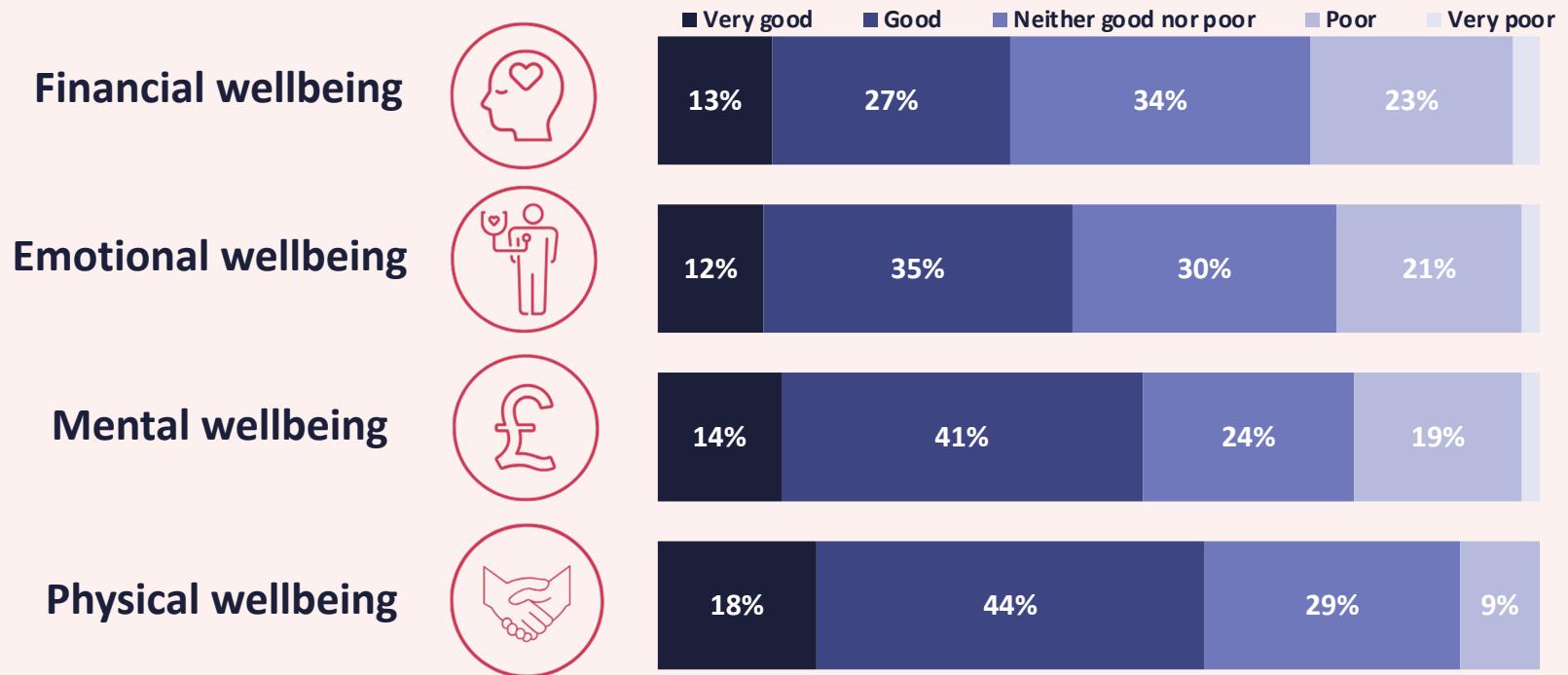
**66%**

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

Customer service  
Operational efficiencies



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



## Do pub employees feel supported?

<1-in-3

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...



= 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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BUTCOMBE  
GROUP



24social.



a Sysco company



Damm



# The Pub Customer Perspective.

Katie Jenkins

Marketing Director

**KAM**



Cymru  
Wales

BUTCOMBE  
GROUP

TYNANT  
ENGLISH FINEST BEERS

Avani Solutions  
**24social.**

**brakes**  
a Sysco company

TNT SPORTS

Damm



Coca-Cola  
EUROPACIFIC  
PARTNERS

LUCKY  
SAINT

UNITY  
CONSISTENTLY RAISING THE BAR



CaptiveWiFi  
Reconomy Connect

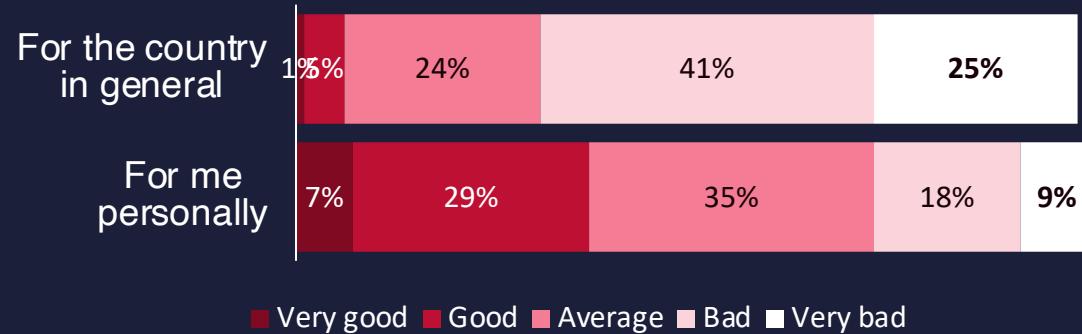
# How are we Brits feeling right now?



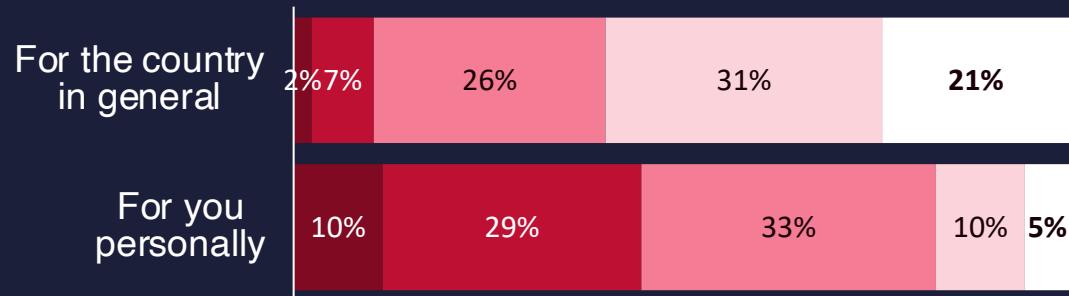
GenZ?  
Happier  
But more  
likely to be  
BORED!

# How positive are Brits about the year ahead?

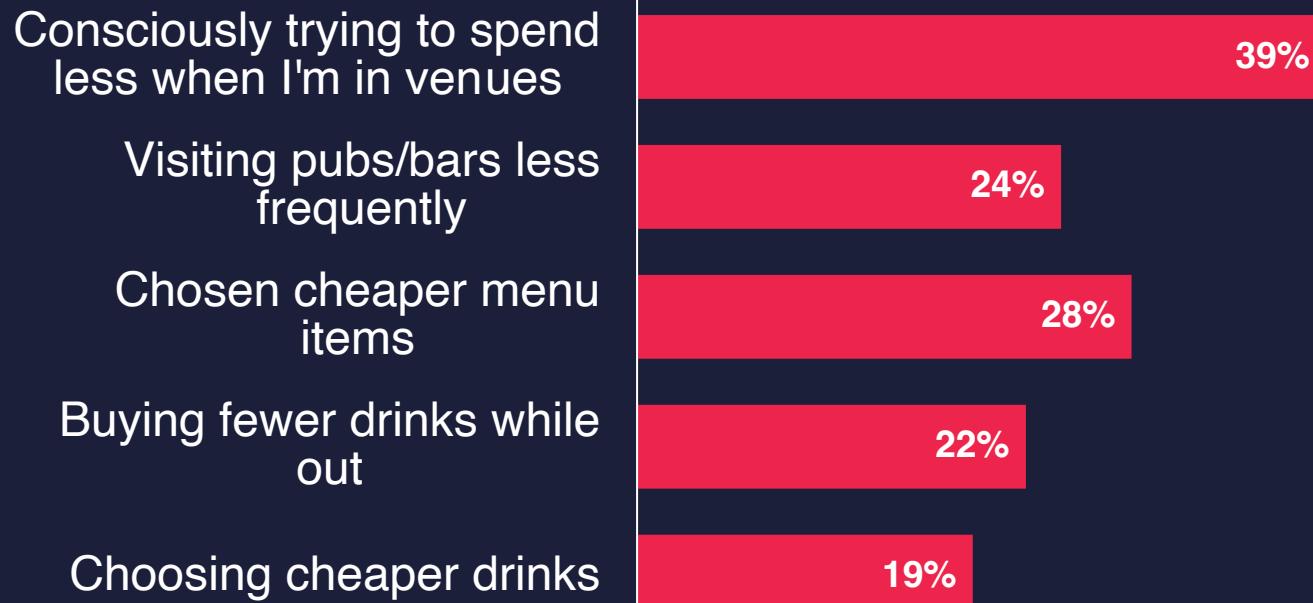
Was 2025 a good or bad year?



And expectations for 2026?



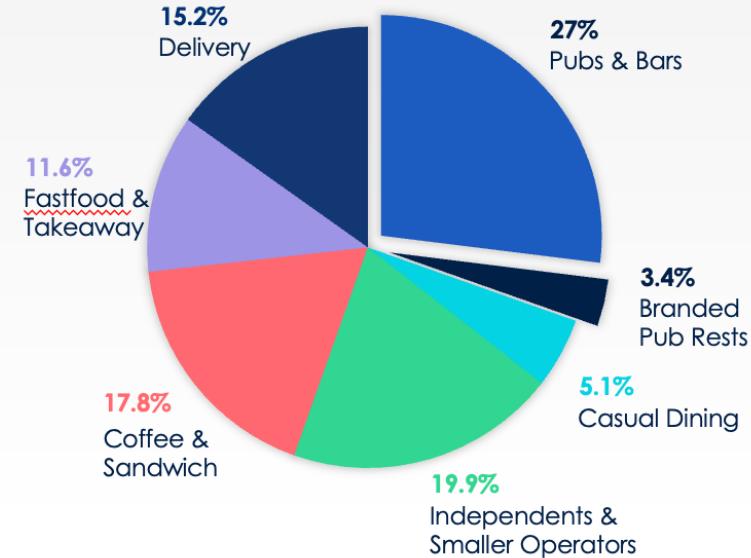
# Changes in spending habits have hit hospitality but things are improving.



# Where are hospitality customers spending their money?

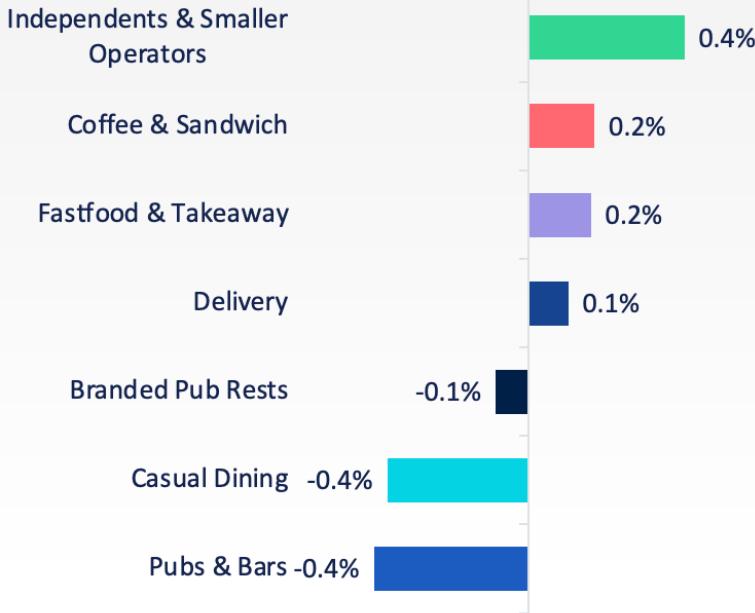
## UK HOSPITALITY BREAKDOWN

Customer Share of Wallet



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

## SHARE OF WALLET CHANGE VS. 2024



# What's driving the shift in pub spend?



# Declining visit frequency

## PUBS & BARS VS. TOTAL UK HOSPITALITY

YOY % Change in Frequency



## YOY % Change in Average Transaction Values (ATV)

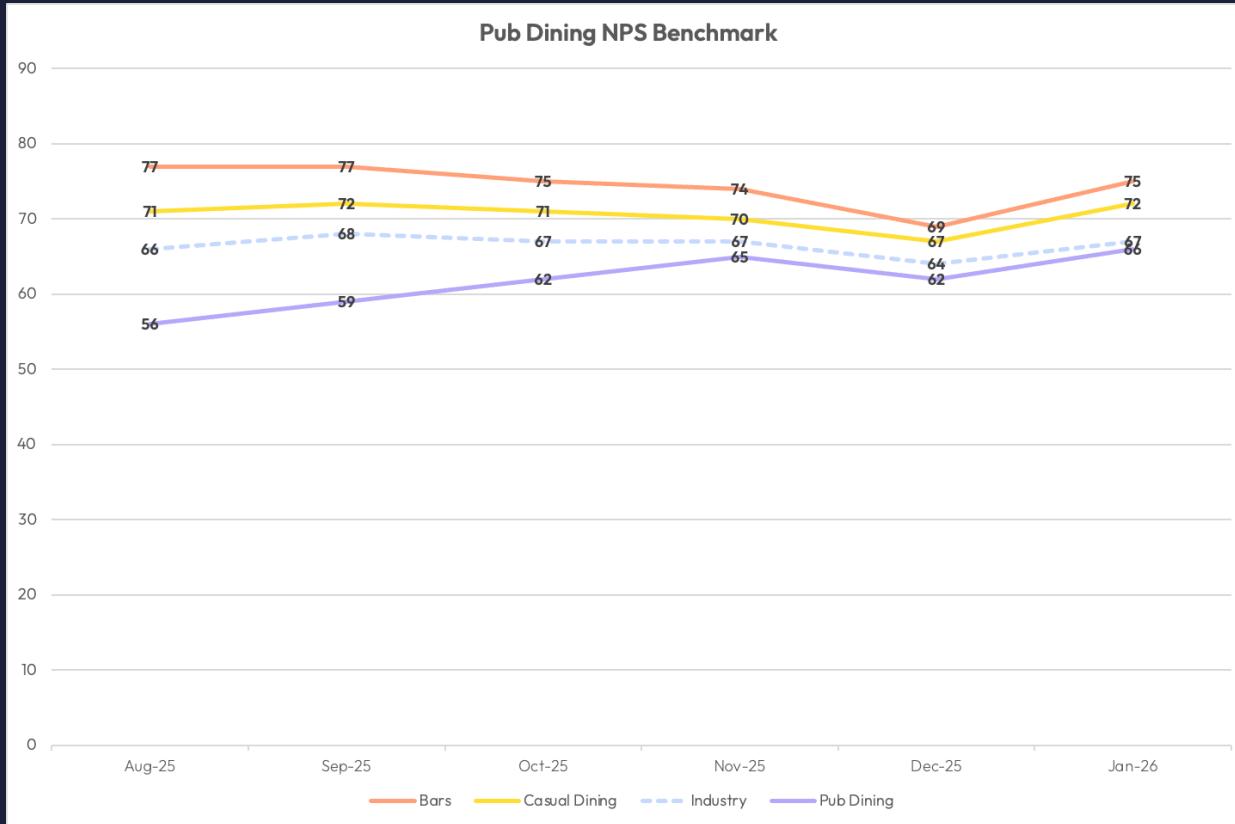
5.0%

0.0%



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



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



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



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

Source: KAM Low+No 2025: Drinking Differently Report 2025

# 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



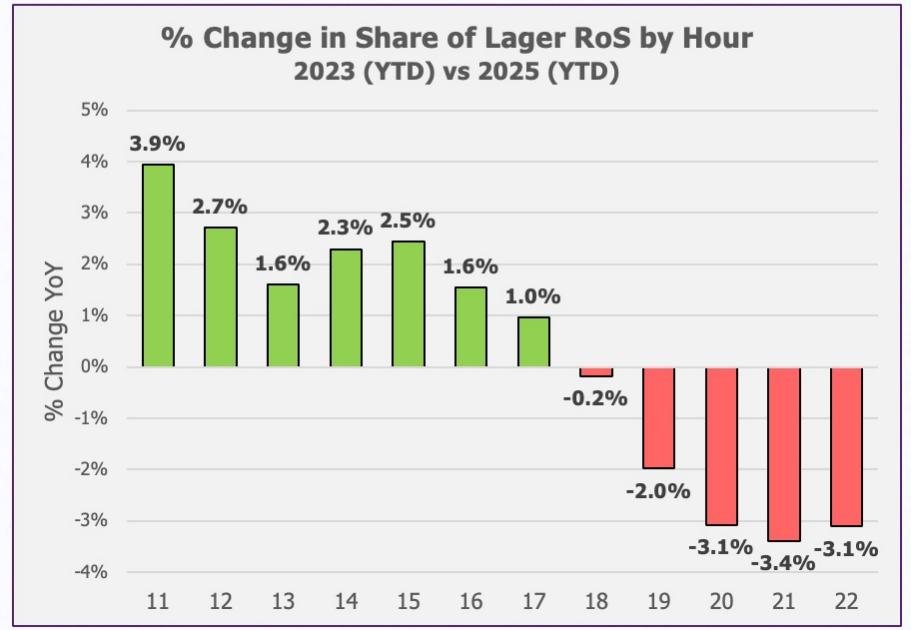
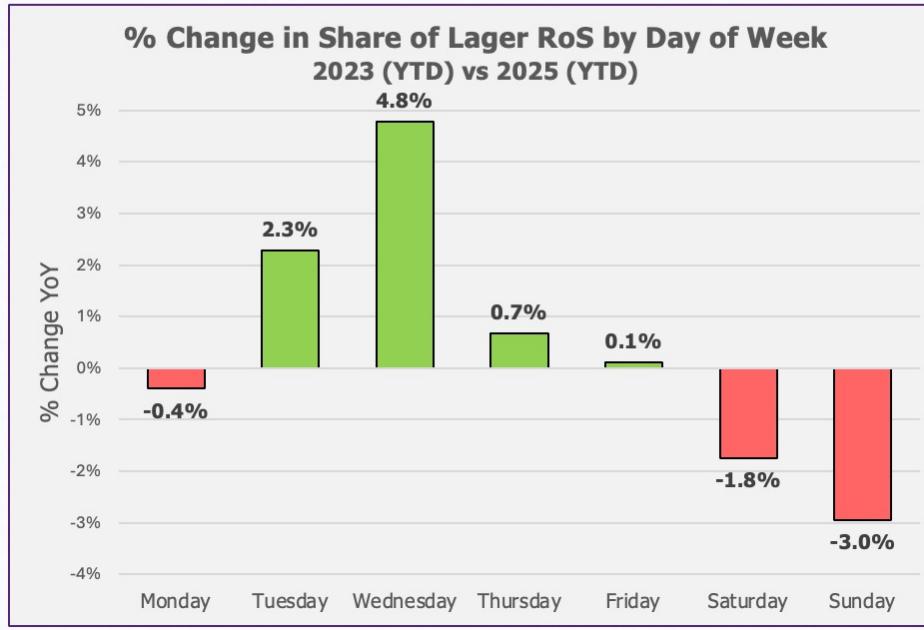
**Use has DOUBLED vs last year**

# Earlier in, earlier out

OXFORD  
PARTNERSHIP

MARKET WATCH™

## Lager RoS Share Change Data by DOW & Hour



# Digital discovery is shaping where people go

Word of mouth



Internet search engine



Google maps

Social media

AI tools

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?



# 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...

30<sup>th</sup> Mar – 1<sup>st</sup> March  
**The Pub Show**  
+ Pub Roadmap



Weds 6<sup>th</sup> May  
**LTC Wellbeing Conference**



Thurs 26<sup>th</sup> June  
**Low+No 2026**



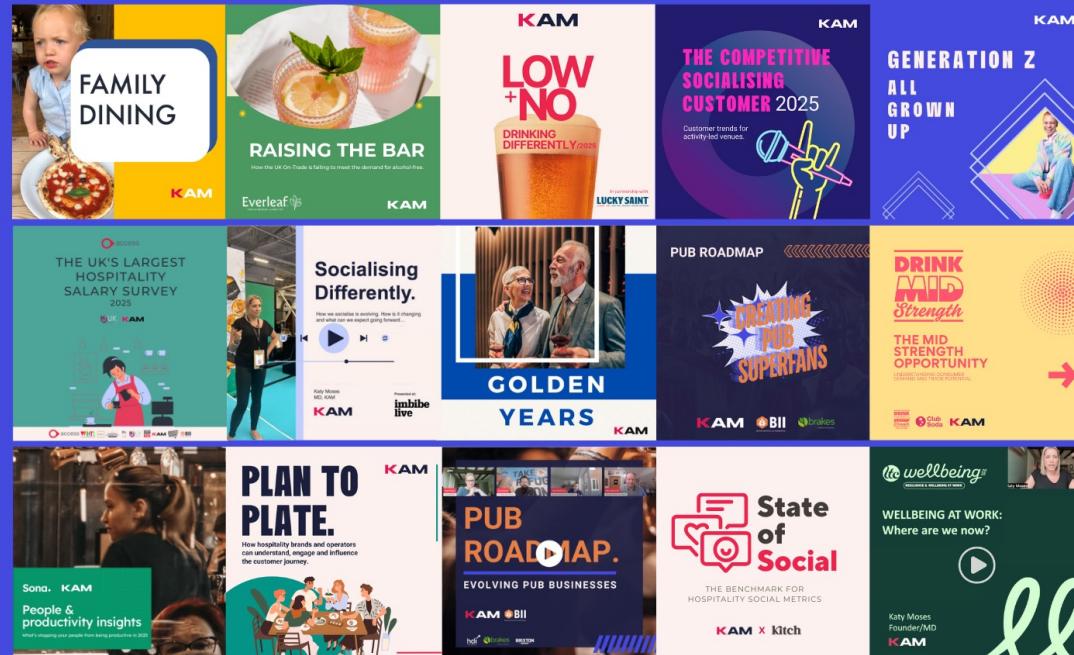
# THE KNOWLEDGE HUB



[www.kaminsight.com](http://www.kaminsight.com)

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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# PUB

## SPOTLIGHT 2026



Thank you  
for joining us.



Tiny Rebel



Cymru  
Wales

BUTCOMBE  
GROUP

TYNANT  
ENGLISH FARMHOUSE BEERS

Avani Solutions  
24social.

brakes  
a Sysco company

TNT SPORTS

Damm

hit  
5

Coca-Cola  
EUROPACIFIC  
PARTNERS

LUCKY  
SAINT

UNITY  
CONSISTENTLY RAISING THE BAR



CaptiveWiFi  
Reconomy Connect