HOSPITALITY ON THE EDGE

The Economic Viability of Historic Pubs

February 2023

Report to

Lincolnshire County Council

Funded by

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Prepared by

hotel solutions
the hotel development consultancy

Contents

* With thanks to Pub Is The Hub for photograph use in some of these snapshots

1 Introduction

1.1 Background to the Study

Over the past 12 months, Historic England has supported two projects - Inns on the Edge in Lincolnshire, and Inn Sites in Shropshire - that centre around exploring the significance of historic pubs as heritage assets, in terms of their fabric, their social history and their role at the heart of their communities. As this role has changed over time, pubs have been required to adapt or face closure, reflecting both the economics of their business models but also the pressure they face from development for higher value uses, including residential and retail.

Mindful of an array of challenges threatening their future, the historic pubs projects seek to build the knowledge base and understanding of the significance of these heritage assets, as well as to better inform how they might be protected and how the businesses they house might thrive. Ironically, the Covid-19 pandemic, which has put additional stress on what are in many cases already fragile pub businesses, has also, in their absence, brought into sharp focus the importance of pubs to communities. The publicity given to the plight of the pub over the past 2 years has focused the eyes of the nation, as well as the government, on the sector, providing a timely background to re-imagining their future, whilst maximising the value that can be added by their past.

In helping to formulate what that future might look like, as well as how it might be delivered and supported, Hotel Solutions was commissioned to deliver a strand of research that examines the issues around the economic viability of historic pub businesses. Commissioned initially as part of the Lincolnshire study, the remit was expanded to consider Shropshire and lessons that could be learned for both the Inns on the Edge and Inn Sites studies. This report summarises the headline findings of that research, and is complemented by two additional outputs, a planning guidance note on pub retention, and a collection of case studies and other resources for pub operators and owners illustrating routes to diversification and other help to future-proof their businesses.




1.2 Brief Scope & Coverage

The principal objectives of the study were:

- To understand the issues, pressures and economics around pub viability, at macro and micro level, and particularly those facing historic pubs
- To learn from good practice case examples and identify keys to success
- To identify what support pubs need to be viable and thrive – and particularly whether heritage has a role to play in this.

Geographically, the study covers the following areas:

- The area in Lincolnshire that runs along the Lincolnshire coast between Boston and Grimsby, taking in over 50 miles of coastline and including 52 parishes. Whilst reference is made in the Brief to rural pubs, the study will also include pubs in the towns and resorts. From a local authority perspective the study area takes in parts of Boston, East Lindsey and North East Lincolnshire.
- In Shropshire, the study area covers the whole of the county, also taking in the unitary authority of Telford & Wrekin, focusing on rural and undesignated areas, ie not towns or conservation areas.

In terms of the definition of an historic pub, the focus in Lincolnshire has been on pubs built pre-1970 with their roots in their local communities. In Shropshire, the focus was pubs on the Heritage at Risk Register or shown on the 1st edition OS map (c.1880).

The audiences for this work and targets for engagement were identified as:

- Publicans
- Local planning authorities
- Local communities where pubs are threatened
- Funding bodies

1.3 The Approach

The work programme has involved wide-ranging review of published research and sector reports, widespread consultation with public and private sector bodies, interviews with pub and hospitality organisations, interviews with pub owners and operators and liaison with both the local Advisory Group and the National Engagement Group set up by the Inns on the Edge and Inn Sites Project Managers.

The work programme specifically comprised:

- A research review to provide a 'state of the industry' overview and national scene-setting for the study, drawing on national surveys and data from sector bodies, as well as reviewing the impacts of the Covid pandemic;
- Consultations with:
    - National and regional pub companies such as Batemans, Coaching Inn Group, Red Cat, Adnams and Fullers
    - Industry bodies and special interest groups including Pub Is The Hub, Plunkett Foundation, UK Hospitality, BBPA (British Beer & Pubs Association), BII (British Institute of Innkeepers) and CAMRA (Campaign for Real Ale)
    - Local authority tourism, economic development and planning officers to identify case study examples, understand policies around pub retention and loss as well as opportunities for pubs to meet wider market needs
    - Pub sector agents and valuers to explore the 'added value' of heritage and any down sides to their historic fabric
    - Heritage organisations in terms of potential support for the development of historic pubs;
- Case studies drawing on national sources as well as local sources including the study areas to demonstrate examples of successful retention, diversification and conversion.

1.4 Study Outputs

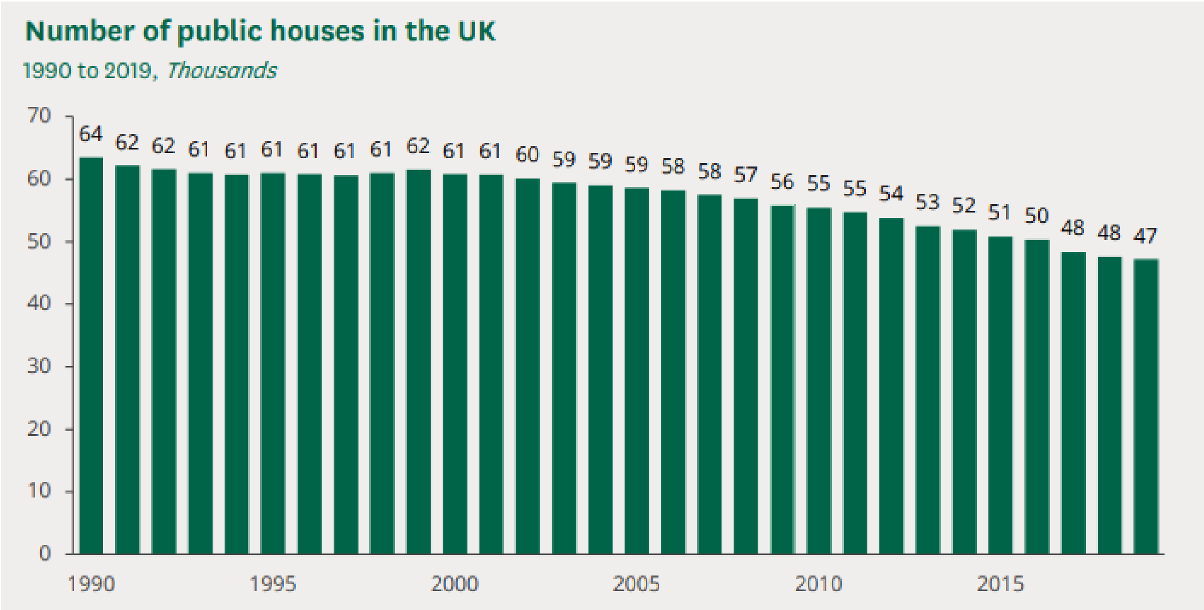
The study outputs comprise:

- An overarching report of the headline findings of the research that includes an element of comparison between the two study areas and recommendations to cover what support pubs need to survive, how local authorities and the heritage sector can help, and next steps actions (this report);
- Presentations to the local Inns on the Edge Advisory Group, the National Engagement Group as well as an end of project symposium organised by Historic England, with supporting materials;
- Preparation of exhibition materials on the economic viability of pubs for the touring Inns on the Edge exhibition;
- Identification of a range of support materials that could be accessed by pub owners and operators, business advisors and pub sector organisations to help them to survive and thrive going forward. These are a mix of case study examples, useful industry reports and other training and advisory materials targeted at the pub sector;
- An additional output of a planning guidance note aimed at local authority Planning Policy and Development Management teams, but also other local authority departments and other organisations that are consulted on pub planning applications. The purpose is to highlight the challenges that pubs face, what they can do to tackle these challenges, and the role that the planning system can play in both protecting pub uses and helping them develop and diversify.

2 State of the Industry Overview

2.1 The Contraction of the Pub Sector

The significant long term decline in the number of pubs on the UK has been well documented and much debated over the past 20 years. According to statistics compiled by BBPA and the House of Commons Library, 13,600 pubs closed between 2000 and 2019, that's over 700 pubs per year, from 60,800 to 47,200, a 22% decrease.



Source: BBPA 2019 Table E5

Pub Statistics, House of Commons Briefing Paper, April 2021 https://researchbriefings.files.parliament.uk/documents/CBP-8591/CBP-8591.pdf

Whilst at the time of writing the impacts of Covid from 2020 are not yet officially documented, BBPA estimates that at least 2000 pubs will have been lost during the pandemic, and a recent survey by property advisers Altus Group (July 2022) recognises an acceleration in closures in the first half of 2022 which could put the numbers of losses much higher than this. The full impacts of Covid have arguably been delayed by the support of the furlough scheme, with the sentiment generally that the combined impacts of Covid on pub businesses and the market will result in greater numbers of pub closures going forward.

In addition to the decline in overall numbers, the mix of pub supply by ownership has also changed significantly. The Beer Orders of 1989 – which limited brewery tied estates to 2000 pubs to create more competition in the market - dramatically changed the balance of ownership (from 43,500 brewery owned pubs in 1990 to11,200 by 2000), and the pub company focus on units with critical mass reducing their presence from 30,400 in 2000 to 13,900 in 2019. Ownership by independents has grown over the period from 19,200 in 2000 to 23,400 in 2019.

2.2 The Challenges Pubs Face

Sitting behind these numbers is a whole range of unprecedented social, political and economic factors that have impacted on pubs and put pressure on them to close. They include:

- Regulations such as the 2007 smoking ban
- Economic factors such as the 2008 recession
- Reduced alcohol consumption particularly amongst 16-24 year olds
- The availability of cheap alcohol from supermarkets and a pattern of home drinking
- Increased competition from a rising number of food outlets and takeaways
- Increased competition for leisure time and a range of options and choice
- Changing consumer preferences
- Development pressures from higher value uses such as residential and retail

Ownership of UK public houses
1990 to 2019

	Brewers	PubCos	Independent	Total
1990	43,500		20,000*	63,500
1991	29,500	12,700	20,000*	62,200
1992	25,700	15,900	20,000*	61,600
1993	26,200	14,800	20,000*	61,000
1994	26,000	14,700	20,000*	60,700
1995	22,200	18,800	20,000*	61,000
1996	22,300	18,500	20,000*	60,800
1997	21,900	18,900	19,800	60,600
1998	19,700	21,700	19,600	61,000
1999	20,400	21,700	19,400	61,500
2000	11,200	30,400	19,200	60,800
2001	10,100	31,600	19,000	60,700
2002	9,800	31,500	18,800	60,100
2003	8,300	32,500	18,600	59,400
2004	8,900	31,700	18,400	59,000
2005	9,400	31,000	18,200	58,600
2006	9,400	30,400	18,400	58,200
2007	9,400	30,000	18,100	57,500
2008	9,100	28,900	18,900	56,900
2009	8,900	28,400	18,600	55,900
2010	8,700	24,200	22,500	55,400
2011	8,500	22,800	23,400	54,700
2012	9,300	19,800	24,700	53,800
2013	9,300	19,000	24,200	52,500
2014	9,800	17,500	24,600	51,900
2015	9,400	16,900	24,500	50,800
2016	9,400	16,900	24,000	50,300
2017	11,000	14,700	22,650	48,350
2018	10,600	14,260	22,740	47,600
2019	9,900	13,900	23,400	47,200

Notes: *Rounded estimate by BBPA
Source: BBPA 2020 Table E5

Pub Statistics, House of Commons Briefing Paper, April 2021 https://researchbriefings.files.parliament.uk/documents/CBP-8591/CBP-8591.pdf

Added to this big picture is an overlay of other issues some with universal impact and some with particular effect on our study areas and historic pub focus. They include:

- For heritage pubs, latent issues associated with their construction, fabric and age which are reflected in the cost of developing, maintaining and operating them.
    - Developers recognise this and that if they are to take such properties on they need to do the refurbishment and development well. Coaching Inn Group for example spend as much on the refurbishment of the property as they do on the acquisition, so to be viable there needs to be a demonstrable up-side in terms of market growth and return.
    - Likewise, an historic pub may come to the market with a conservation deficit that it would be difficult to get a return on which may be accompanied by an unrealistic expectation on value by the vendor. Grants and enabling mechanisms may be needed in such circumstances.
    - Planning and listing are also issues that can limit what you can do in an historic pub and the cost of doing it.
- For rural pubs, issues to do with the size of their catchment and the availability of other drivers to demand to create sufficient volume and value to sustain the pub.
    - Towns and cities have bigger markets and things that might drive new demand. Rural areas however have more finite markets unless they can create demand through a destinational offer, additional markets like tourists, or transient business.
- Coastal pubs have similar challenges around the market they can draw on; whilst they can benefit from a tourist market in the main summer season, their core catchment is only 180 degrees, and drive time catchments are also likely to be smaller than inland locations. Seasonality is an additional challenge in terms of securing trained staff who want a year round income.

Whilst these long term trends remain, the catastrophic impacts of the Covid-19 pandemic on the pub and hospitality industry have dominated the narrative around the future of the sector, with prolonged closure and periodic and restricted opening amongst a changing array of legal requirements making any kind of normality in the trading environment impossible. Ironically, although recognition of the importance of pubs in a social, community and well-being role has probably never been higher, the financial pressures resulting from the pandemic have made profitability and viability much harder to achieve.

- Pub owners, tenants and operators have come out of the pandemic with huge levels of debt, only to be faced with a changed market in terms of attitudes and behaviours, including elderly people still frightened to mix, and others simply establishing different patterns of leisure time use or less socialising outside the family unit.
- There is a huge staffing crisis, as hospitality workers have chosen to move into roles less impacted by covid, including growing sectors like distribution/delivery, perhaps also offering more sociable hours. The staffing crisis has also been impacted by Brexit and the availability of European labour which has always played an important role in staffing our pubs, hotels and other food and beverage businesses.
- Add to this increasing costs, to a degree relating to higher staff salaries required to secure chefs and other skills, but more so over the past 6 months due to the energy crisis, especially as businesses were not initially protected by the energy price cap.
- The cost of living crisis is also impacting the market, affecting consumer confidence and constraining disposable income spend particularly in the face of surging energy bills.
- Wider supply chain issues affected by the war in Ukraine but also Covid.

In addition, pubs have faced issues around VAT treatment, levels of beer duty and business rates that compound the difficulty of negotiating the road to recovery and survival.

The adjacent word cloud summarises in a visual form the range of challenges facing pubs, drawn from consultation with industry specialists and review of relevant research and reports focusing on the pub sector.

It provides a useful tool to help formulate strategies and initiatives to support the pub sector going forward.

3 Profiling the Study Areas

3.1 Introduction

Pubs have by their very nature always served and been a reflection of their local communities. The nature of their local areas and wider catchments are therefore of significance in determining their potential markets and how to position their offer. Understanding this can help to explain some of the issues around economic viability, though this will vary by type of pub and business model. Some of the typical criteria that pub companies and investors will look at in assessing the market potential and fit of a pub offering include:

- Population numbers in a 1-5 mile catchment
- Demographic profile, including age, socio-economic group and Mosaic/Experian segments[1]
- Levels of affluence and deprivation also feature in the above
- Presence of business drivers to generate demand from local corporates
- Presence of tourism drivers to generate leisure demand
- Competition in terms of other pubs but also other food and drink as well as overnight accommodation establishments

As context to this report we provide below an overview of what we know about the study areas and their wider county setting. Because the study areas are somewhat idiosyncratic in their boundaries, getting information to this cellular level is a challenge. However, we can get a sense of their make-up which is also useful for any comparative analysis.

3.2 The Lincolnshire Coast

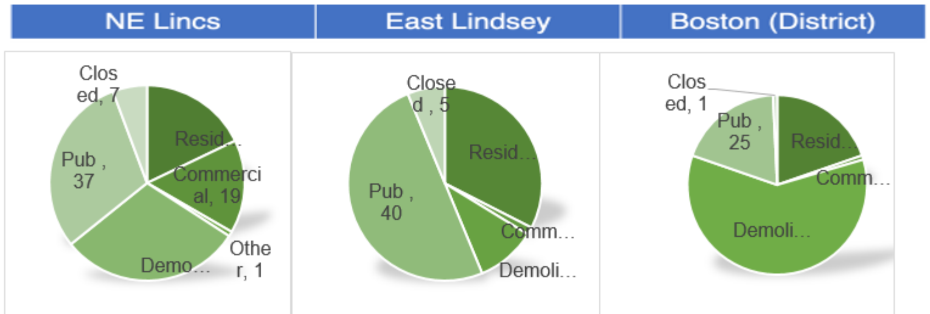
The study area for the Inns on the Edge project extends from Grimsby in the north to Boston in the south. It covers over 50 miles of coastline, extending 5-10km inland, taking in 3 local planning authorities (North East Lincolnshire, East Lindsey and Boston), and a total of 52 parishes from small villages to market towns and resorts. The study area was shaped by awareness of a number of initiatives and opportunities including an application for the area to be recognised as a Heritage Coast; significant funding coming forward via Town Deals (Boston, Grimsby, Skegness, Mablethorpe) and Heritage Action Zones (Grimsby and Boston); and opportunities to enhance and diversify the tourism offer.
The map overleaf illustrates this.

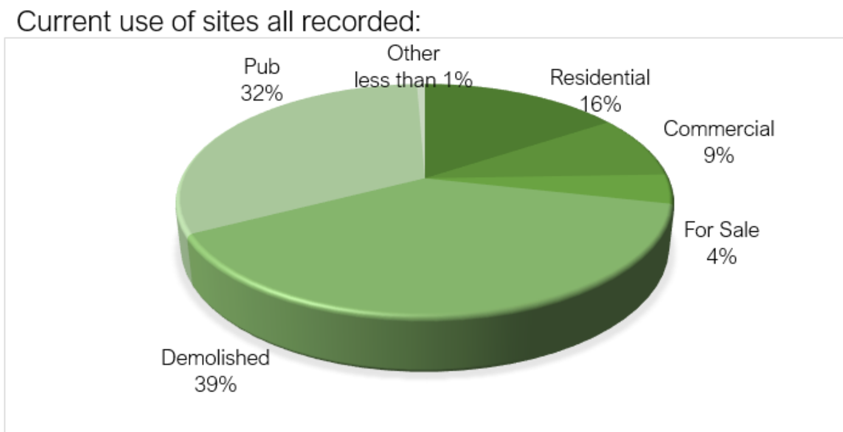
[1] A consumer classification tool that divides the market into segments by a range of characteristics to better understand their behaviour and interests

The research[2] identified 320 pubs (1890 baseline) in the study area, of which only 102 are still trading as pubs today. Of those pubs lost:

- 16% have gone to residential use
- 9% have converted to commercial use
- 4% are currently for sale
- 1% have been lost to other uses
- 39% have been demolished

That leaves less than one-third, 31%, still trading as pubs.





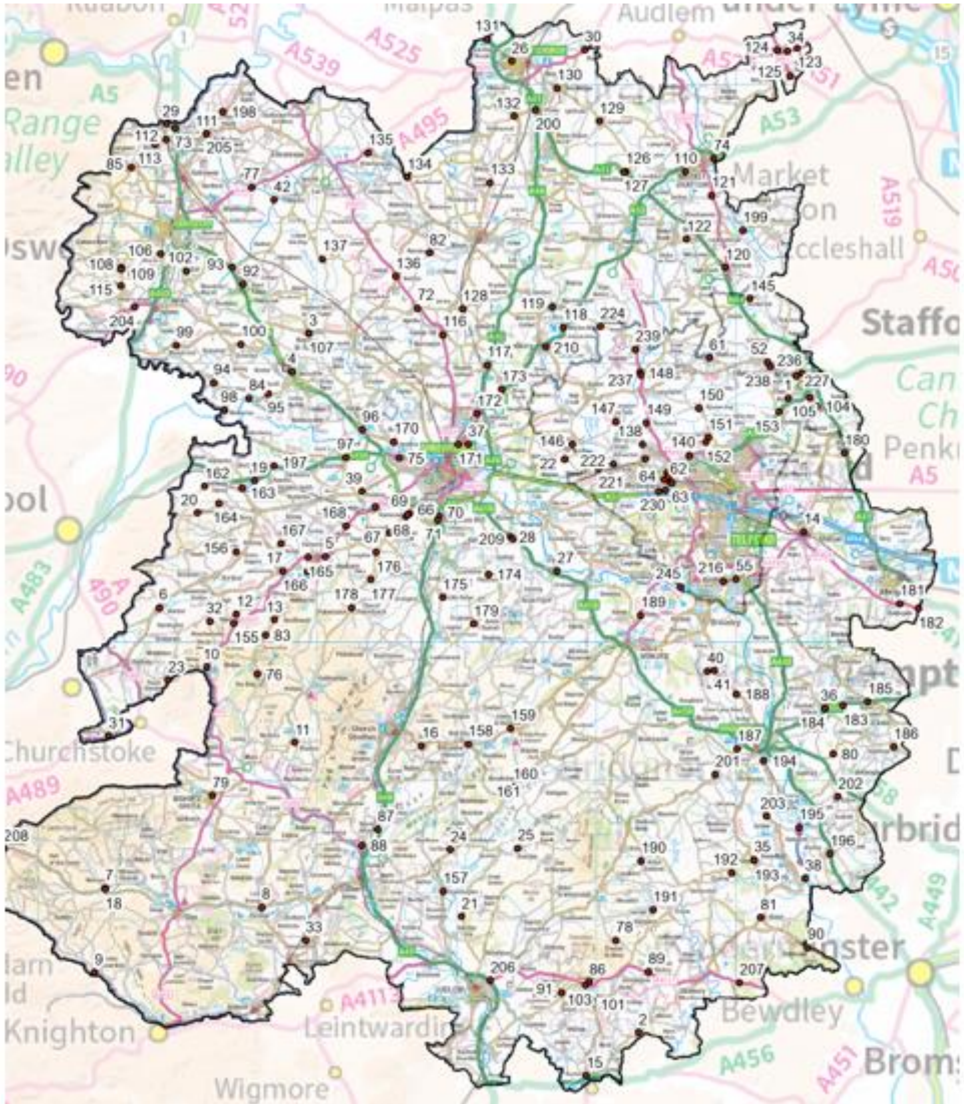
[2] Inns on The Edge: Historic Public Houses Along the Lincolnshire Coast (Marc Knighton & Ian Marshman, Historic England Research Reports Series, 2023

3.3 Rural Shropshire

The Inn Sites[3] project focused on the rural parts of Shropshire and on ‘undesignated’ properties, that is not listed or in a conservation area, and so having no protection and being most at risk.

From a base of 205 rural pubs identified on the 1st edition OS map (1880) or on the Heritage at Risk Register (this excludes the 127 listed pubs and pubs in conservation areas), 124 were still licensed in March 2021.

The distribution is shown on the adjacent map.



[3] Inn Sites: Remembering & Recording Shropshire’s Rural Pub Heritage (TDR Heritage, 2022)

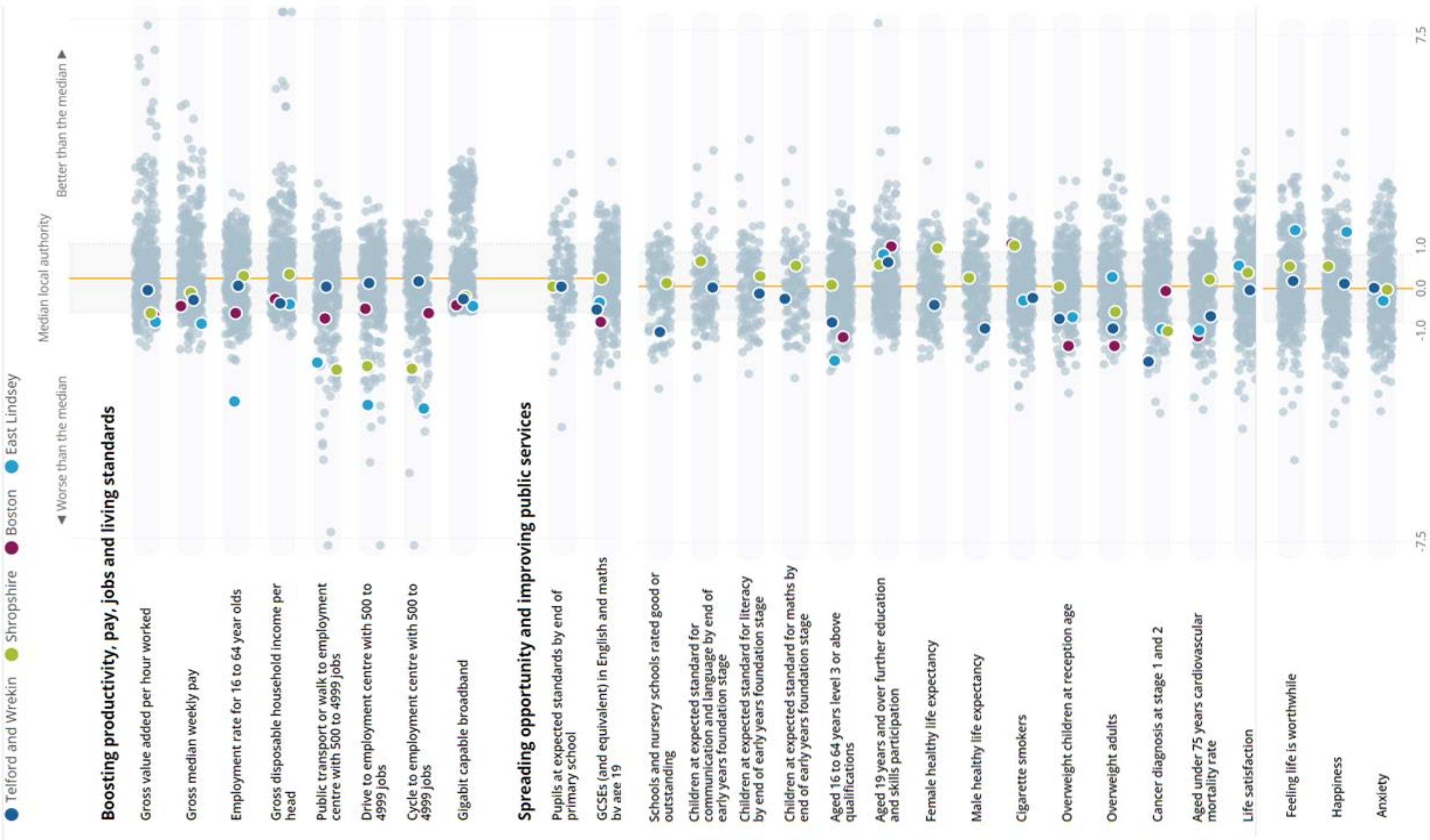
3.4 Comparing the Study Areas

Clearly, we are dealing with very different study areas on many counts, but particularly in terms of:

- Scale of area – Shropshire being county-wide, though within this only focusing on rural areas; Lincolnshire covering parts of 3 districts but only a strip focusing on the coast, though this does include some urban areas in Grimsby, Skegness and Boston;
- Shropshire being inland has a 360 degree catchment, whereas the Lincolnshire Coast has a 180 degree catchment, and this is a factor in investor decision-making;
- Ease of access is also a factor, with access to parts of Shropshire facilitated by the M6 /M54, putting them also in close proximity to the Birmingham conurbation; Lincolnshire has no motorways (though a dual carriageway access to the A1 and Nottingham), and access to the coast is via a series of A roads and the journey from the county town Lincoln taking over an hour, so a more remote location;
- The visitor economy is important to both areas, with Shropshire having the World Heritage Site at Ironbridge Gorge as well as other heritage attractions such as Attingham Park and Ludlow Castle, and Lincolnshire having its Cathedral and Castle and the traditional resort of Skegness with its iconic Jolly Fisherman, plus Boston with its associations with the Pilgrim Fathers. Both have attractive countryside including the AONBs of the Shropshire Hills and the Lincolnshire Wolds, and all that they offer for outdoor activities, walking and cycling. Business and conference tourism is of particular importance to Telford, and in the Lincolnshire Coast study area is important to Grimsby and Boston.
- In terms of the volume and value of tourism:
  - Greater Lincolnshire attracts 35.44 m visits, 50m visitor days, £2.49 bn in visitor spend, and supports 20,912 jobs through the visitor economy. The figures for the 3 Districts in the study area are:
    - East Lindsey £733m spend, 4.9m visitors, 13.07m visitor days, 9151 jobs
    - Boston £91.8m spend, 1.5 m visitors, 1.98m visitor days, 1138 jobs
    - North East Lincolnshire £642m spend, 10.3m visitors, 12.8m visitor days and 7160 jobs
  - Shropshire attracts c.15m visitors and £800m in visitor spending, supporting over 15,000 jobs through the visitor economy.
- The Lincolnshire coast attracts more longer holidays because of its holiday resort role and offer, but this business is also seasonal which impacts on demand for facilities including pubs.
- Whilst Lincolnshire's population is double that of Shropshire – 1.1m compared to 507,000 – Lincolnshire is a large county and population densities are not dissimilar (158/145 per km2). Telford as the main town in the area has a population of 138,000, bigger than

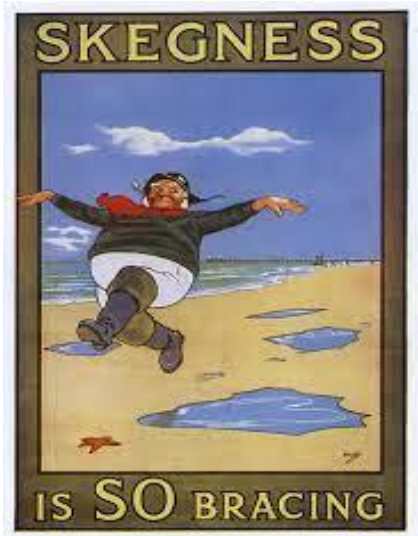
Lincolnshire's main city of Lincoln (c. 104,000), and also has Shrewsbury at c. 70,000. These populations will create demand for pubs in rural areas if they are destination offers. The populations on the Lincolnshire Coast are Skegness 24,000, Boston 41,000 and Grimsby 88,000.

- The graphic below summarises key ONS data at local authority level about Shropshire, Telford & Wrekin, Skegness and Boston, compared to all local authorities, which covers economic, population, education, health and well-being indices[4].



[4] Local authority population characteristics comparison tool at: https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/articles/populationprofilesforlocalauthoritiesinengland/2020-12-14

- From this it can be seen that Shropshire is generally a more affluent area, scoring more highly or less below national average than the Lincolnshire Districts on most indices.
- If the Index of Multiple Deprivation is added to this, it is clear that the three Lincolnshire Districts that make up the Inns on the Edge study area are amongst some of the most deprived in England. Out of 317 areas, the places are[5] (with low being most deprived):
    - East Lindsey = 45
    - North East Lincolnshire = 31
    - Boston = 90
    - Shropshire = 183



[5] Rank of average score: https://www.gov.uk/government/statistics/english-indices-of-deprivation-2019

4 Viability & Business Models

4.1 Defining Viability

Any discussion of the economic viability of pubs needs to first clarify what is meant by viability.

Simplistically, viability is about making enough money to cover a pub's bills and other out-goings as well as pay staff – and hopefully something more than this to deliver a return for the owner or tenant.

That 'something more' will be dependent upon the business model for any individual pub site and operation.

The diversity and uniqueness of pubs, intrinsically and as businesses, is huge – and is partly why they have such breadth of appeal. An independent pub owned and operated freehold will have a very different viability threshold to a leased or tenanted pub that is managed or pub company owned, with turnover and profitability thresholds set by the owner.

As an independent pub owner/operator you might be prepared to live and work in the pub and take a small surplus – one partner might even have another day time job or business. However a pub company will have clear targets for turnover by type of pub when they put Managers in (e.g. minimum £15,000 turnover/week), and for profitability in order to get their required return on investment (e.g. 15-20%) in the acquisition and development of the pub or site.

And community pubs are coming from a different place of social and community value as a facility and hub, albeit they still need to do more than break even to be able to re-invest along the way.

So the varying objectives of owners and operators result in different commercial approaches throwing up variable turnover targets, cost bases and margins to work to.

4.2 Business Models & Benchmarks

The four models we have identified are:

- Freehold/independently owned and managed pubs
- Leased and tenanted pubs
- Managed houses that are pub company owned
- Community owned and managed units.

Whilst the criteria for viability are set by each individual owner, there will be standard margins that they should aspire to attain to maximise profitability. Industry benchmarks for different types of pub and model are useful tools to guide in particular operators new to the sector as to typical turnover figures, costs and margins.

For illustrative purposes, we have drawn in this study on the British Beer & Pubs Association annual benchmarking report 'Running a Pub' (2022) that is a useful starting point, aimed at tenants and lessees. https://beerandpub.com/wp-content/uploads/2022/05/Running-a-pub-2021-FINAL.pdf . Nine pub models are illustrated in the report, split into four types of unit:

- Community wet-led
    - Small community locals, 100% drink, turnover c£4000/week
    - Community wet-led, 90% drink, 10% food, turnover c. £5000/week
    - Community wet-led, 90% drink, 10% food, c. £8000/week
    - Community wet-led, 90% drink, 10% food, c. £15000/week
- Rural character
    - 50% food, 50% drink, turnover c£5000/week
    - 50% food, 50% drink, turnover c. £8000/week
- Town centre pub/bar
    - 70% drink, 30% food, turnover c. £10,000/week
- Town/country food-led
    - 30% drink, 70% food, turnover c.£10,000/week

- 30% drink, 70% food, turnover c. £15,000/week

These produce the following levels of gross and operating profit:

BBPA BENCHMARKING MODELS All Figures Per Week					
Pub Model	Turnover £	Gross Profit %	Gross Profit £	Operating Profit %	Operating Profit £
Small community local	4000	52.5%	£2093	14.6%	£580
Community wet-led	5000	53.6%	£2665	14.7%	£729
Community wet-led	8000	54.6%	£4312	15.8%	£1252
Community wet-led	15000	57.1%	£8585	17.5%	£2632
Rural character	5000	55.1%	£3120	14.9%	£843
Rural character	8000	58.8%	£5480	15.4%	£1443
Town centre pub/bar	10000	57.4%	£5435	16.1%	£1528
Town/country food-led	10000	61.3%	£6040	16.8%	£1653
Town/country food-led	15000	62%	£8931	17.9%	£2571

The impacts of the pandemic on the sector and the market, and the ensuing staffing crisis, exacerbated by Brexit, the energy/cost of living increases, and the war in Ukraine, are resulting in spiralling costs increases and eating into profit margins – indeed in many cases owners and operators are putting money into their pubs to keep them afloat in the hope that this unique set of pressures will dissipate or that government intervention will cap and/or otherwise support these outgoings. As we write, leading sector organisations are lobbying for this help.

In the face of these extraordinary influences, disentangling trends going forward and anticipating the shape of the pub in the future compared to a pre-pandemic 2020, feels a bit like crystal ball gazing. These shifting sands are throwing up some quite different equations in terms of viability and creating an environment of on-going uncertainty for a sector whose resilience appears to be approaching breaking point. Even respected national brands and creative market makers like craft beer company BrewDog are closing pubs with the viability challenge at their heart.

'Reality in the hospitality space is starting to bite and bite hard. And the government needs to get a grip, now. If nothing happens, the UK looks set to lose half of its pubs and bars and all the millions of jobs these locations provide, as well as the vital role they play in local communities. It would be simply impossible to get these bars even close to financial viability in the predictable future.' (James Watt, CEO, BrewDog).

https://www.insider.co.uk/news/brewdog-criticises-clueless-government-closes-27880920

4.3 A Variable Landscape

It can be seen from the above that even within the sector pubs are not operating on a level playing field. It is a complex and variable landscape, with the operating environment of any pub being impacted not just by its ownership and business model, but also its style, location, catchment, local economy and surrounding infrastructure.

Add to this the unprecedented circumstances of the past 2 years and the viability challenge to an already fragile and weakened sector looks even more onerous to deliver.

As we look forwards, this means that one size doesn't fit all in terms of the support that pubs might need, and the most appropriate solutions to underpinning a viable future.

5 Adapting for the Future

5.1 Diversification & Re-invention

When trying to identify solutions to the myriad challenges that pubs face, two words stand out – diversification and re-invention. Pubs have always been good at adapting to change in their markets and environments, from the place where agricultural workers would have their pint after work to the sophisticated dining, accommodation and other offerings now seen in the market, pubs are a reflextion of the communities they serve.

In diversifying, pubs need to be creative and relevant to what the market wants and needs. Covid has provided fertile ground for this out of necessity. Examples have included premiumising products to increase a customer's spend over the same number of drinks and visits.

But diversification is also about additional activities to create new income streams, from both existing markets and new markets they can attract.

The entrepreneurial spirit that lockdown forged saw pubs offering takeaway food, with one pub company identifying a pub that was taking £16-17,000 a week just in takeaway food. Many pubs have continued this offer.

Outdoor dining has also found its own niche, with what stemmed from necessity growing into a preference for many markets.

Operators responded by providing covered outdoor spaces, with some investing in quality structures/tipis and gazebos with fire pits, fur rugs, carpets and heating which together with attractive lighting create instargrammable moments that customers share in the wider market place. Even as the weather got colder, many pubs found these spaces booking up ahead of inside tables. In effect, pubs have in some cases been able to double their covers through re-imagining their outdoor space at the fraction of the price of a more permanent traditional build extension.

Making the most of every inch of space, inside and out, and at all times of day, can generate a diverse range of business from existing and new customers. Pubs have introduced micro-breweries, cocktail lounges, flexible spaces that can be used for everything from coffee and cake to yoga and parent and toddler groups, shops, community hub spaces delivering training and providing space for networking, secure cycle storage and facilities for dogs and walkers.

The introduction of accommodation into upstairs areas is a natural complement to the food and drink offering of a pub, with other accommodation opportunities being offered by the conversion of outbuildings, offering caravan and camping on adjacent land, and motorhome stopovers in car parks.

Busier locations may find it easier to draw on a bigger embedded and transient market, but more rural locations can also benefit both by serving their local communities not just with food and drink but also with non-pub services, at the same time positioning themselves as destination offers that have the ability to draw users for whatever it is that is their usp.

5.2 Case Snapshots

We provide below some case snapshots of pub redevelopment and diversification, demonstrating how they have adapted to attract new markets and income streams, drawing on examples provided to us during our research and consultations with pub companies and industry organisations.

The Ram at Wandsworth[6]

An example of a city environment and a large and diverse catchment, which provides a good example of making the most of their spaces at all times, and attracting both multiple markets and the same markets for multiple purposes. Whilst downstairs remains as a traditional pub, they have added their own micro-brewery. Upstairs has been developed with a modern twist, being used for functions and meetings, local group get-togethers, yoga classes and a taco truck with cocktail bar.




The Old Black Lion, Northampton[7]

This was a 16th century closed up inn adjacent to the 12th century St Peter's Church which the Churches Conservation Trust has taken on. The pub was bought by Northampton Borough Council and is leased to the Trust. The restoration has received significant levels of grant funding, including a National Lottery Heritage Fund Enterprise Grant of £1.8m towards a total project cost of £2.5m, and is seen as the cornerstone of the wider regeneration of this area of the town centre. The pub will serve the local community with its food and drink offering, but also have meetings and private dining space, support events in the church, and offer 5 guest bedrooms on a B&B basis. 116 inside covers are complemented by 65 outside covers giving the pub good critical mass.

[6] The Ram is listed Grade II. https://historicengland.org.uk/listing/the-list/list-entry/1391087
[7] Grade II listed: https://historicengland.org.uk/listing/the-list/list-entry/1294018

The George Inn, Ludlow[8]

The George is a nice example of a pub that became a Pizza Express restaurant and is now reverting to an inn under the ownership of Oakman Inns. Oakman have major investment and acquisition plans as a group, and are planning to expand to 70 units in 2026 from a current base of 36. They are investing £2.2m in the site, expanding the property to increase the covers to 200 including 60 in the courtyard; this extension was put forward in the planning case as key to the viability of the pub, the volumes being required to recoup this investment.

Cholmeley Arms, Burton Coggles, Grantham, Lincolnshire[9]

The Cholmeley Arms is owned by the Easton Estate and is run by a chef/Manager couple. Their diversification project involved converting a barn adjoining the pub into a village farm shop supplying local game, fruit, vegetables and other food from local suppliers. The chef is also a trained butcher and the shop includes a meat preparation area and meat counter. The scheme cost £45,000 and received a £5000 grant from the County Council.

[8] Grade II listed: https://historicengland.org.uk/listing/the-list/list-entry/1202791

[9] Unlisted building in a conservation area

Blue Bell, Whaplode St Catherine, Spalding, Lincolnshire[10]

The Bell has been developed into a thriving local business through diversifying its activities. This has included buying a small field adjacent to the pub to operate as a Caravan and Motorhome Club site; building relationships with a local short to serve shoot breakfasts and lunches; and using an adjoining barn as a separate micro-brewery. The caravan site has 5 hard-standing pitches with electric hook up and there are 2 water points, plus waste disposal points and in-field wi-fi. Privacy screening has also been planted. Total project costs for the caravan site were £21,300, which attracted a £4000 grant from Pub Is The Hub.



Green Man, Scamblesby, Louth, Lincolnshire[11]

The Green Man is located on the edge of the Lincolnshire Wolds AONB and with the Viking Way running through the village is popular with walkers. Cadwell Park racing circuit is also nearby generating visitors to events. From a closed pub it re-opened in 2019 after a refurbishment, only to be closed due to Covid. Their response was to create a hub for the community as a shop and meeting point, as well as serving visitors to the wider area. The shop also features local produce and crafts


[10] Unlisted and not in a conservation area
[11] Unlisted and not in a conservation area

Thorold at Marston, Grantham, Lincolnshire[12]

The Thorold Arms is a community owned pub, achieved after a 3 year long campaign to save the pub from conversion to residential. The pub, run by a mixture of paid and volunteer staff, acts as a real focus for the local community, offering a café, an artisan shop, quality B&B facilities, a pop-up post office, and with meeting space as well as the pub and restaurant offers facilities for classes as diverse as mindfulness, IT, and chess club.

Carpenters Arms, Boston, Lincolnshire[13]

The Carpenters Arms is a Bateman's pub that had fallen into disrepair and was taken over by new tenants in 2018. Their focus was on real ale, real fires, and a great music offer, and in 2019 they decided to diversify into overnight accommodation, converting two floors of domestic accommodation into 6 guest rooms, having identified a shortage of accommodation in Boston. The rooms have been furnished in a quirky contemporary style including bespoke artwork and vintage music posters of artists that have performed in Boston.

12 Unlisted and not in a conservation area
13 Grade II listed and in a conservation area: https://historicengland.org.uk/listing/the-list/list-entry/1389087.

The Plough, Nettleham, Lincoln[14]

The Plough is another Bateman's tenancy in Nettleham, north of Lincoln, which has developed a speciality food offering around Greek food, as the chef is Greek. A butcher's shop adjacent to the pub became vacant during Covid, and the tenants approached Bateman's to take this over as a take-away food shop, selling all the food on offer in the pub. The have retained this post-Covid , and have expanded their take away food offer into two additional units in Lincoln, further helping sustain their business.

Salutation Inn, Nettleton, Lincolnshire[15]

The Sali as it is known locally is a pub firmly embedded in its local community but also conscious to move with market trends. Five years ago they took the bold step to develop two glamping-style lodge units on land adjacent to the pub to cater for the visitor market. At a cost of c. £50,000, these units were specially designed for them by a local company, with one positioned as a family unit with a capacity of 4 people, and one a twin/double. The pub is on the edge of the Wolds AONB, so close to excellent walking and cycling. Also during Covid, the pub opened a 'snack-shack' with a grant from the local council, which provided snacks but also groceries for the local community and transient traffic in the area.

[14] Grade II listed and in a conservation area
[15] Unlisted building not in a conservation area

Old Kings Head, Kirton, Boston, Lincolnshire[16]

The Old Kings Head is a different sort of example, as its restoration and re-positioning has been very much heritage-led and funded. The 400 year old pub was bought by Heritage Lincolnshire in 2016, who then began a fund-raising campaign to save its structure and introduce new uses. It re-opened in 2021 following extensive renovation and conversion, and now offers a café, B&B and meeting rooms for community and visitor use alike. The project was backed by Heritage Lottery Fund who provided £2m of the £2.4m funding.

Pheasant at Neenton, Shropshire[17]

The Pheasant had been closed for 9 years when the local community decided to form a Community Benefit Society to rescue and restore it. With funding help from Shropshire County Council and planning permission for housing association development on adacent land, the pub was acquired in 2013, re-opening in 2014, with its Oak Room restaurant and bedrooms providing a diverse income stream. Wider facilities and services have been developed for the local community, including a play area, internet access, drop-off facilities for local suppliers, café outside pub hours, and live music. The Pheasant won Sawday's Community Pub of the Year in 2016/17.

[16] Grade II listed building in a conservation area: https://historicengland.org.uk/listing/the-list/list-entry/1062023
[17] Unlisted building in a conservation area

Cleveland Arms, Telford, Shropshire[18]

The Cleveland Arms at High Ercall is a story still unfolding. Having been acquired by a builder in 2013, the pub traded until 2016 before closing to the public. Over that period, a variable food and drink offering diminished further, and opening became erratic. The condition of the building has since deteriorted considerably, and concerns over structural issues were put forward as part of the case for non-viability and planning application for change of use. The pub was successfully registered as an Asset of Community Value by the local council giving the local community the opportunity to pursue an acquisition through a Community Benefit Society. Telford & Wrekin Council's policy in their local plan that protects community facilities requires demonstration by the owner that the facility has been adequately and professionally marketed for sale over at least 12 months at a realistic price. To date this has not been proven, and the pub remains on the market in hope of a solution for its future retention.

The Eagles, Cressage, Shropshire[19]

The Eagles at Cressage is an example where the battle to remain in use as a pub has been lost. A series of planning applications over a 6 year period since its closure in 2015 proposed everything from conversion to a single dwelling, conversion to two houses with 8 new houses around it, and a scaled down pub and four new homes, to demolition of the Eagles and clearance of the site. The pub was successfully listed Grade II in 2020 to prevent this happening. Permission was granted in 2021 for conversion to two residential dwellings to allow for the enhancement of the historic landmark building and its environs in the core of the village.

[18] Unlisted building in a conservation area

[19] Grade II listed and not in a conservation area: https://historicengland.org.uk/listing/the-list/list-entry/1468661%E2%80%99

Fighting Cocks, Stottesdon, Shropshire[20]

A survey by the Parish Council identified the need for a shop in the pub that supports local suppliers, provides a quality offer with friendly service, and puts the pub at the heart of the local community. The Fighting Cocks opened the convenience store in a stone outbuilding next to the pub. As well as essential items the shop sells freshly baked pies, food products from the pub such as their home made sausages, and artisan produce from local suppliers. The shop serves a wide area and has become a meeting point for those in the wider rual area that are relatively isolated. The total project cost was £30,000, funded by a mix of the pub, the Countryside Agency and local Hobsons Brewery.

The Old Gate at Heathton, Shropshire[21]

The Old Gate is a 16th century country pub in the Shropshire village of Heathton. The owners took the time during Covid to renovate the pub, spending £60,000 of personal savings to create an all-weather outdoor space and reinvigorate the pub and its trading - £18,000 on a safari-style tent, resurfacing the car park, lighting, landscaping and painting. The tent has helped drive footfall, and added 100 covers to the capacity of the pub. Trade quadrupled from £1500 per week to £6000 per week. The flexible space can also be used for other purposes, which has included outdoor theatre, Sunday afternoon BBQs and pop up themed food nights. Trading forecasts anticipate £10-15,000 per week. With the recent sale of the pub, Pub Is The Hub has been involved in vetting purchasers and putting protocols in place to help protect it from potential interest in alternative/residential use.

[20] This case study dates back to 2004 so project costs likely now an under-estimate; the Countryside Agency now forms part of Natural England. Unlisted building in a conservation area

[21] Unlisted building not in a conservation area

White Horse, Church Fenton, Yorkshire[22]

The White Horse at Church Fenton is a community pub that has been supported by The Plunkett Foundation, which officially opened in 2019. It has been included here particularly because it has made use of a source of funding available through local authorities that could have wider application. The Parich Council and a community hub group were critical in driving the bid to save the pub which had closed in 2016. Working with the local council, the council bought the pub using Public Works Loan Board funding (public sector borrowing at low interest rates). A £500,000 loan was secured repayable over 50 years, with the Community Benefit Society (Church Fenton Community Hub) acting as landlord, and a sub-lease to experienced tenants who also ran a nearby pub. A share offer also raised £50,000 from 200 shareholders.

Battlesteads, Wark, Northumberland[23]

Battlesteads has won multiple awards for its initiatives around sustainability, that include achieving a carbon footprint six times lower than the industry average and championing local producers in Northumberland. Its eco-friendly initiatives include a woodchip sustainable boiler, investment in green energy, and an extensive kitchen garden and polytunnels that supply much of the fruit and vegetables for the pub and restaurant. Guided tours of the kitchen garden are provided daily to visitors. A series of diversification projects have seen Battlesteads taking advantage of its unique location as part of an International Dark Skies Park by building its own on-site observatory with a series of events held that complement and work alongside the Kielder Observatory at the head of Kielder Water. In addition to its bedroom offer, Battlesteads has also developed five eco-lodges in its grounds. Together these initiatives have been recognised in multiple awards including the Catey Sustainable Business Award and Visit England's Awards for Excellence.

[22] Unlisted building not in a conservation area
[23] Unlisted building not in a conservation area

5.3 Key Lessons

There are some key learnings from these case studies, the state of the industry review and the pub company and industry body consultations that can help guide pubs going forward.

- First, it's clear that beer (or drinks) alone are not enough
- There is a need to diversify to attract a broader range of markets and additional income streams
- And to maximise the use of the space that pubs have both inside and outside
- And to do this at all times across the day, the week and the year – so a need to think about generating off-peak business
- Being relevant to and in touch with what the market wants is paramount – whether that's locals or visitors

- That might well mean offering services not traditionally offered by pubs, so there's a need to think outside the box and listen to the pub's communities in their widest sense
- And be inclusive – offering vegan menus, being dog-friendly, making your property accessible are all examples
- Responding tho the 'experience' economy and making use of social media - this is a real opportunity as the market increasingly is looking for experiences and instagrammable moments to share – in effect doing your marketing for you if you get it right
- Re-imagined outdoor spaces can play a critical role in delivering additional covers, but with their firepits and fairy lights can also be part of delivering a sought after experience.

Add to this the fundamentals to success identified by CAMRA – great service and relationship-building; a quality offer across all drinks food and other services; choice and variety, for families, sports enthusiasts, tourists, encompassing both the traditional and the contemporary; and a community connection.

5.4 The Role of Heritage

The focus of this study has been on historic pubs, and whilst many of the challenges and opportunities we have highlighted can benefit all pubs, the role that heritage has to play is an important consideration for this brief.

A pub's heritage, in terms of both the characteristics of its physical form and also its stories and role in the community over the years, are an integral part of the offer for many, and of the appeal to the market. This is particularly so in relation to tourist markets, with traditional pubs being amongst the top three things that overseas visitors like about Britain. Authenticity also appeals, in terms of the story and the fabric.

From a property perspective, the agents and pub companies we consulted indicated that the heritage characteristics of properties can help to sell them – maybe can even enhance value as well as appeal to investors and operators – but that this is something it is impossible to put a number on.

And of course, heritage comes at a cost – both in terms of development cost and operationally. Pub companies indicated there needs to be potential for a significant uplift in trading and returns to pay back the levels of investment required.

This needs to be recognised more broadly in terms of funding for pubs, especially where a pub can serve a wider role – as a heritage building to be preserved, a tourism resource to attract and serve a more transient market, and a community facility.

6 Making It Happen

6.1 Where's the Money?

Pubs have faced an unprecedented set of challenges, both long term and in terms of the recent impacts of Covid, Brexit and the energy and cost of living crises. Many are going forward with significant levels of debt in the face of increasing costs and a market nervous about the future impacting behaviours amongst the pub-going public and their discretionary spend.

Kate Nicholls from UK Hospitality has recently spoken of 10,000 hospitality businesses at risk of closure in what she referred to as 'the perfect storm' of inflation and surging energy costs creating a potentially bigger crisis than the pandemic[24].

And a recent BII survey saw 1 in 10 pubs reporting that they don't think their business is viable, and that 2022 will be make or break for them.

The sector clearly needs continued support to get through these turbulent times, but identifying sources of help and particularly grant aid for pub diversification projects has proved a challenge.

Looking back at some of the case snapshots, profile schemes like the CCT Northampton pub, whilst a great example of co-operation and resourcing from multiple interested parties are something of a one-off and not the solution for the regular pub.

Having investigated funding sources for pubs in Lincolnshire as part of other programmes of work that Lincolnshire County Council is involved with, it seems that pubs fall outside the criteria for many of the funding sources. A lot of these are focused on sectors other than the visitor economy, and on business to business schemes, rather than business to consumer, which is where pubs sit. Withdrawal from Europe has also removed access to some of the rural development funds that have helped tourism projects in the past and that pub diversification initiatives could have taken advantage of.

The content and coverage of UK Prosperity and Levelling Up Funds are yet to play out, and it's unclear whether support for pubs could feature in these programmes. Much will depend upon what individual local authorities have put forward in terms of programmes and initiatives within

[24] https://www.bighospitality.co.uk/Article/2022/06/06/More-than-10-000-hospitality-businesses-restaurants-pubs-at-risk-of-closure-warns-Kate-Nicholls-UKHospitality

their bids. The recent announcement of a Rural Prosperity Fund could offer some opportunity, again to be channelled via local authorities, but it could start to bridge the post-Brexit funding gap for tourism projects in rural areas, including coverage of visitor accommodation.

6.2 Pub Support & Development Programmes

There are two organisations that have been offering support for pubs for a number of years and that have had a real impact on pub survival, as is evident from some of the case snapshots featured. These are:

- **Pub Is The Hub** is a not for profit organisation offering advice and support to publicans, rural pubs and community services to enable them to survive and thrive. They offer small amounts of funding – up to £3000 per project – via their Community Services Fund, which can help elements of diversification that benefit the community, such as the introduction of a shop, post office, improved outdoor spaces, and community hub/meeting space facilities. Inspired by the Prince of Wales, they have become the 'go to' organisation for help and support for struggling rural pubs, with an expert team of advisors who have helped pubs re-imagine their role and the services they offer their local communities.
- **The Plunkett Foundation** is a national charity that supports rural communities across the UK to tackle the issues they face through creating community businesses run by and for the benefit of the local community. They have helped communities to buy out failing pubs, often in the face of developer pressure to convert to residential or other uses, through setting up community interest companies, guiding them through the process with associated funding.

Beyond this, little else is in place currently at a national level to direct pubs to for help.

At a local level in relation to this study, **Lincolnshire County Council** has taken an active interest in the pub sector through a number of projects, of which the Inns on the Edge is one. Prior to this, and as an off-shoot of a hotel development programme being run across the county, LCC launched a **pub accommodation development programme** which whilst starting as a research project evolved to deliver advisory workshops and detailed advisory guidance – More Room At the Inn - that can be found on the Business Lincolnshire website via the link here: https://www.greaterlincolnshirelep.co.uk/assets/documents/GLLEP_Pub_Development_Guide_-_June_2020.pdf .

In April 2022, LCC launched a **Pub Diversification Programme**, offering expert help and advice to pubs across Greater Lincolnshire interested in introducing new activities and income streams to their business. https://business.visitlincolnshire.com/resources/commercial/pub-diversification/ .

However, these are one-off programmes, and would have a lot more teeth if there were funding packages to accompany them, and particularly to cover the development of visitor accommodation.

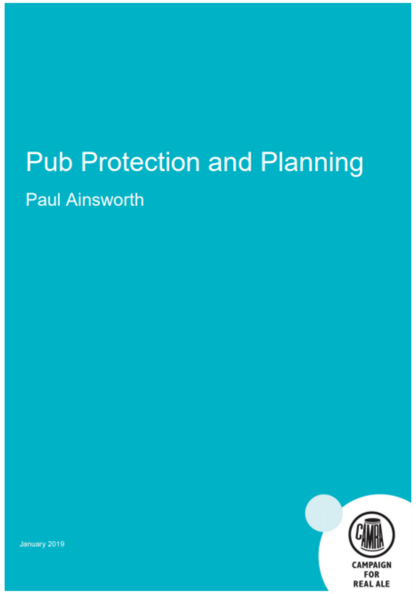
Beyond the operational measures being lobbied for by industry bodies, around the treatment of VAT, energy caps, beer duty and business rates, there are a number of things that pubs need to enable them to diversify, several of which public sector partners could help with. These include:

- Local authorities to be aware of the issues pubs are facing, as well as the solutions, and to reflect these in their work programmes and funding bids;
- This includes a facilitating planning framework to support diversification, especially in rural areas, but also to protect pub buildings that are increasingly being lost, often without full consultation with tourism, economic development and heritage/conservation colleagues;
- Pubs need to know what the opportunities are to diversify to help them survive and thrive and where there are sources of help and advice;
- They also need business support networks to be able to help them to generate or further their ideas, and to support them in getting to a place where they can secure funding;
- Independent pubs are particularly exposed in the face of these challenges as they don't have the support and backing of pub companies and breweries to advise and direct them, and in some cases input financially;
- Networking is also important – pubs are an important part of their local communities, but can sometimes be isolated from wider networks and the live-in lifestyle and long hours often means that operators don't have the time to network more widely. Organisations like Destination Lincolnshire can help bring them into tourism and business networks, and bring forward opportunities for collaboration and peer to peer learning/advice;
- Marketing and social media is a clear weakness amongst small businesses, and pubs are no exception. Lack of expertise and all-consuming workloads can make it difficult to focus on this. Many would benefit from a digital audit of their web and social media presence and some simple tips and procedures to put in place to increase profile and bookability.

All of the above could usefully be wrapped into a bid for funding for a wider pub diversification programme to follow the Lincolnshire pilot, with more resource behind it to make things happen.

6.3 Protecting Historic Pubs

The huge loss of pubs to change of use has resulted in the loss of community facilities, tourism resources, and heritage buildings. Our research has encountered many examples of pubs lost to other uses without consultation with relevant bodies, both internally within a local authority and externally via interested tourism and heritage organisations and professionals. There is a real need to get the message out there that there can be alternative futures for pubs given the chance to find the right owner, operator, investor and business model, and local authority planning departments need to be equipped with this knowledge and access to expertise to challenge the case made by developers for the loss of a community facility.



CAMRA has produced an excellent guide on this which sets out the range of 'tools' available to protect pubs though the planning process, which includes statutory listing, registering a pub as an Asset of Community Value, and including within the Local Plan a pub/community facility retention policy. See the link here:

https://www1-camra.s3.eu-west-1.amazonaws.com/wp-content/uploads/2019/03/08154613/Pub-Protection-and-Planning-v.January-2019.pdf

CAMRA has also produced an excellent guide to assessing pub viability that could be built into planning policy and the approach that local authorities take to decision-making on pub change of use applications, specifiying evidence to be presented. See the link here:

https://www1-camra.s3.eu-west-1.amazonaws.com/wp-content/uploads/2019/03/14082430/Public-House-Viability-Test-v.2015.pdf

Acknowledgeing all of the above, an additional output of this study will be a **planning guidance note** for distribution to local authorities in Lincolnshire and Shropshire setting out the issues and opportunities around pub diversification and how the planning process can help support and protect them going forward.

6.4 Concluding Thoughts

A concluding thought kindly provided by John Longden, Chief Executive of Pub Is The Hub:

> ***The pub has always been a dynamic responder to change over the past 600 years and will reinvent itself to continue to be a sociable meeting place in the future, but not exactly the one we left behind in 2020. (CX, PITH)***[25]

These words summarise well how pubs over time have continued to reflect societal shifts and to find new positionings – and, it is hoped, provide a note of optimism to end on as the sector continues to navigate periods of continued change ahead.

[25] Hotel Solutions consultation interview

References/Further Reading:

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- Local Authority Population Profile Comparison Tool: https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/articles/populationprofilesforlocalauthoritiesinengland/2020 -12-14
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- Number of Pubs in England and Wales Falls to Lowest on Record (July 2022): https://www.thedrinksbusiness.com/2022/07/number-of-pubs-in-england-and-wales-falls-to-lowest-on-record/
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- The Power of Pubs (Localis/BBPA, 2021): https://localis.org.uk/research/the-power-of-pubs/
- Running a Pub (2022); British Beer & Pubs Association annual benchmarking report. https://beerandpub.com/wp-content/uploads/2022/05/Running-a-pub-2021-FINAL.pdf .
- Brewdog Criticises Clueless Government as it Closes Six Pubs (01.09.22): https://www.insider.co.uk/news/brewdog-criticises-clueless-government-closes-27880920
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- Pub Is The Hub: https://www.pubisthehub.org.uk/
- The Plunkett Foundation: https://plunkett.co.uk/
- British Institute of Innkeepers: https://www.bii.org/
- British Beer & Pubs Association: https://beerandpub.com/