



Evaluating the Economic and Social Impact of Pubs

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Executive Summary

This report presents a comprehensive analysis of the economic and social value generated by pubs within the Punch Pubs & Co. portfolio. Drawing on a large mixed-methods study conducted across 2025, the research examines how pubs contribute to local economies, strengthen community life, and support wellbeing across diverse geographical contexts in England. The findings show that pubs serve multiple roles by operating as commercial businesses, community hubs, social support structures, and sources of local identity and continuity.

Purpose of the Study

Punch commissioned this research to develop a fuller understanding of the value its pubs generate for the communities they serve. The study evaluates both economic impact (employment, wages, suppliers, multiplier effects) and social value (community engagement, wellbeing, identity, and informal support networks). Our analysis also explores how pubs help address wider social challenges such as loneliness, isolation, declining civic spaces, and local economic inequalities.

Research Design

The study was delivered in two sequential phases:

Phase I (Quantitative Analysis): Focused on measuring the economic and social impact of pubs using survey data from Publicans and Management Partners¹, and internal financial data from Punch. A total of 207 pubs across the estate participated in the survey, representing a broad cross-section of locations, pub types and operating models.

Phase II (Qualitative Analysis): Provided in-depth insight into the lived experiences, routines and social relationships underpinning the value that pubs generate. Data collection included 81 participants, comprising four focus groups and 31 semi-structured interviews with customers, alongside 12 interviews with Publicans. The thematic analysis produced five overarching themes explaining how customers perceive and experience the role of their local pub.

Key Findings

1. Pubs Are Significant Economic Anchors

Surveyed pubs directly supported, on average, just over 10 employees, including more than five full-time and nearly five part-time roles. Seasonal employment was also common. The average annual sales per pub were approximately £580K, reflecting the substantial scale at which pubs operate within local markets.

Pubs also sustain extensive local supply chains. On average, each pub spent around £468 per week (£24K per year) with local suppliers, benefiting a wide variety of trades and services – from entertainment providers and butchers, to bakers, grocers, and florists.

Using projections based on survey findings and internal financial data, the Punch Pubs & Co. estate-wide estimates show: £278-£437 million in total economic contribution from wages; £31-£71 million in total local economic contribution; £146 million in annual supplier spending, rising to £337 million when indirect and induced effects are included; 8,900 FTE jobs are directly supported, almost doubling when multiplier effects are applied; a total economic footprint of £1.16-£1.69 billion per year.

These figures demonstrate that pubs form an essential component of local economic systems, driving employment, supplier activity, and local spending.

¹ The term Publicans is used as an umbrella descriptor for pub operators across both operating models – Leased & Tenanted (L&T) and Management Partnerships (MP).

2. Pubs Generate Substantial Social Value

Publicans and Management Partners across the estate reported sustained support for local charities and community initiatives. On average:

- Each pub supported three or more charities per year.
- Staff contributed 23 hours of volunteering per pub annually, rising to 45 hours among pubs with higher engagement.
- In-kind contributions totalled over £3,200 per pub per year, including donated space, sponsorship, goods, and advertising.

These practices reveal a broad and meaningful commitment to local social causes that extends beyond commercial operations.

3. Measuring Community Engagement: The CEI

The Community Engagement Index (CEI) was developed to quantify the breadth and depth of pubs' community engagement. Based on 21 indicators grouped into four domains (Community Activities, Charitable & Voluntary Contributions, Engagement with Local Institutions, and Community Identity) the CEI provides a single, comparable measure of engagement across the estate.

Key insights include:

- CEI scores indicate consistently high engagement from urban to rural pubs.
- The qualitative findings reveal regional variation in how pubs engage, reflecting differences in local demographics, economic conditions, and community needs.
- There is a clear, positive relationship between CEI scores and commercial performance. Pubs with higher community engagement achieve higher revenues.

Together, these findings show that community engagement is both socially valuable and commercially beneficial.

4. How Pubs Create Social Value: Evidence from Phase II

The thematic analysis identified **five overarching themes** that explain how customers experience the value of their local pub:

- 1. The Pub as a Community Anchor** – Pubs serve as steady, familiar places that structure people's weekly routines and provide consistency in everyday life.
- 2. Belonging, Friendship and Wellbeing** – Pubs foster deep social bonds and act as supportive environments where people feel recognised, welcome, and safe.
- 3. Community Support and Local Contribution** – Pubs act as hubs for informal support, sharing information, practical help and local resources, and hosting community groups and events.
- 4. Economy and Employment** – Pubs are recognised as contributors to the local economy, offering jobs, attracting visitors, and supporting other local businesses.
- 5. Meaning, Memory, and Continuity** – Pubs hold emotional and symbolic significance. They are spaces where important life events unfold, and where personal and community histories accumulate.

Participants described their pub as a “second home,” an “extended family,” or “the centre of the village.” Feelings of attachment were particularly strong in rural areas where alternatives are limited, and the pub stands as one of the last accessible community spaces.

Concerns about closures were widespread, with participants emphasising that the loss of a pub would have significant social, emotional, and economic consequences.

5. The Role of Publicans

Publicans play a pivotal role in shaping the value pubs generate. Their leadership, ethos and approach determine: the atmosphere of the pub; the degree of safety, welcome and inclusion; the strength of community engagement; the continuity of relationships over time.

Continuity of publican leadership was seen as deeply important, while pubs with histories of rapid turnover were viewed as unstable or diminished. Publicans in rural areas often go beyond their formal roles by providing transport for customers, supporting isolated residents, and ensuring that the pub remains an accessible, inclusive community asset.

Conclusion

Pubs across the Punch Pubs portfolio create substantial economic and social value. They support employment, stimulate local supply chains, and generate significant economic output, while also providing vital social infrastructure, enhancing wellbeing, strengthening local identities, and fostering everyday social connection.

Importantly, the economic and social roles of pubs are mutually reinforcing: pubs with higher levels of community engagement tend to perform more strongly commercially. Investing in the community-facing functions of pubs strengthens both local community life and the long-term resilience of the business.



William Mitchell
Morecambe

Cook House
Widnes

Introduction and Background

1.1 Theoretical Background

Pubs are integral to British traditions and cultural heritage. They are vital to cultivating social connections among residents and strengthening community cohesion, a concept that defines the extent to which individuals feel connected to and actively engaged with their local community. From this perspective, stronger community unity is achieved when individuals actively contribute to the overall wellbeing of their community. Pubs play a significant role in this process by fostering relationships and, directly or indirectly, enhancing the provision of social capital within local communities (Cabras, 2011; Cabras & Mount, 2017; Cabras & Reggiani, 2010; Mount & Cabras, 2016; Sforzi & Bianchi, 2020; Thurnell-Read, 2021, 2024).

The positive role of pubs as contributors to social capital and community cohesion across rural, urban and suburban areas is well established in academic literature. Pubs are widely acknowledged as vital to the formation and maintenance of lasting social connections (Thurnell-Read, 2021). Mount and Cabras (2016) show that pubs bolster community wellbeing and cohesion over time in rural England, while Cabras and Mount (2017) highlight the value of pubs as “third places”² that encourage social interaction, community cohesion, and economic development in rural Ireland. Similarly, Cabras (2011) explores the social capital generated by village pubs in England, demonstrating their role as informal meeting spaces that foster social connection. Supporting this view, Sforzi and Bianchi (2020) show that community-owned pubs in urban settings help build social ties that bridge diverse groups and contribute to urban regeneration. Moreover, Thurnell-Read (2024) finds that traditional pub culture fosters a sense of belonging and continuity, especially during periods of social change. The author also observes that pub-goers in the study’s focus groups overwhelmingly welcomed modern pub culture, seeing it as bringing higher service standards and a more inclusive, less male-dominated pub atmosphere.

Further analysis highlights a high level of complementarity between pubs and local social events and activities occurring across villages and towns, with pubs often serving as more effective venues for community gatherings – such as sports matches, charity events, and social clubs – than other spaces like sports and leisure centres or village halls. Without pubs, many communities would have few, if any, suitable venues for hosting events or communal activities. The presence of pubs within local areas has been linked to positive spillover effects on the housing market, supporting the maintenance – or even increase – of property values over time. Cabras et al. (2021) find a significant positive relationship between the presence of pubs and property values across Great Britain, suggesting that pubs contribute to both local economic resilience and community cohesion. Another notable spillover is the effect on public safety, with Publicans often helping to monitor antisocial behaviour and other illicit activities in their surroundings.

Recent academic research supports this view, with Cabras *et al.* (2023) highlighting the role of Publicans as informal guardians in their communities. They suggest that well-managed pubs, where social ties are strong, can help reduce antisocial behaviour, deter crime, and improve public safety. Pubs serve a broader purpose than merely being venues for drinking and/or dining. Throughout the UK, they function as local landmarks, focal points for community gatherings and supporters of various charitable initiatives. Additionally, pubs are vital economic hubs, providing employment opportunities and supporting other local businesses and suppliers.

This social and economic significance is particularly crucial in less urbanised areas, where alternative community spaces for social interaction are becoming increasingly scarce.

² Third places refers to physical spaces outside family households and workplaces, the latter defined as ‘first’ and ‘second’ places respectively.

1.2 Organisational Context and Report Aims

Punch Pubs & Co. is one of the UK's leading pub operators, with an estate of more than 1,250 venues across rural, suburban, and urban locations. Its diverse portfolio ranges from traditional pubs that have long been a focal point for local community life, heritage, and identity, to modern gastropubs that offer food, drink, entertainment and social spaces for customers of all ages and backgrounds.

The Punch Pubs estate can be split into two broad operating models – Leased and Tenanted (L&T) and Management Partnerships (MP). Approximately 75% of the estate comprises L&T pubs, with the remaining 25% being MP pubs. L&T Publicans rent and run their pubs on Punch's behalf, with many also living on-site. Punch supports these Publicans with training, marketing, and business development. MP pubs are operated by a limited company alongside a self-employed Management Partner, who manages day-to-day operations, including staffing. Punch retains control over the product range and pricing structure in MP pubs, tailoring these to each site's circumstances. Throughout this report, Publican is used as an umbrella term for a pub operator across both operating models within Punch (L&T and MP).

Punch Pubs & Co. is committed to supporting its communities through local partnerships, charitable initiatives, and responsible business practices. This report was commissioned to explore the types and scale of the economic and social value created by its pubs. The report investigates how pubs contribute to wellbeing by providing inclusive social spaces that support local economies. By quantifying these impacts, Punch aims to better understand the broader value that its pubs generate. This work also reflects growing interest in how the hospitality sector can help tackle wider social challenges – from loneliness and isolation to economic inequality.

2 Research Methodology

This study comprised two phases: Phase I, based on quantitative data analysis, and Phase II, based on qualitative data analysis. The objective of Phase I was to ascertain and appraise the impact of pubs on local communities, evaluating their function as both economic drivers and significant social institutions. The objectives of Phase II were to explore pubs contributions from a deeper qualitative evidence base, researching the lived experiences, perceptions, and individual practices that underpin the economic and social value generated by pubs.



Deanes House
Prescot

2.1 Phase I: Rationale and Background

Phase I examined how pubs contribute to the development of stronger, more interconnected communities throughout the United Kingdom. The first phase of this study brought together three sources of evidence:

- (1) survey responses from more than 200 Publicans and Management Partners;
- (2) internal company financial data³; and
- (3) data on national economic multipliers for the sector.

The data collected from these sources have been used to produce evidence-based estimates of the social and community value created by pubs operated on behalf of Punch. Additionally, this data has been utilised to measure the total economic activity (including direct, indirect, and induced) resulting from business operations related to employment, wages, and supplier spending. Data from these sources were also used to develop a composite Community Engagement Index (CEI), which captures the breadth and depth of each pub's contributions to local community life. The CEI provides a unique analytical framework for linking social engagement to economic performance and enables comparisons across different types of pubs and regions.

Data was collected through a structured survey questionnaire. The survey template was designed and administered in collaboration with Punch Pubs. This exercise aimed at capturing economic and social dimensions of pub activity, which were not readily available using existing internal data sources. To ensure inclusivity and to reduce selection bias, all Publicans were invited to participate, regardless of pub type or tenure. Following consultation with Punch and a pilot survey, two versions of the questionnaire were distributed across the pub estate: one for Leased & Tenanted (L&T) Publicans, which included additional questions on business performance; and one for pubs operated by Management Partners (MP), where these business performance questions were omitted because the information was available centrally. For clarity, throughout this report, the term "Publicans" is used to refer collectively to operators of both L&T and MP pubs.

The survey questionnaire was sent to all 1,264 pubs (at the time of the quantitative research) operating within the Punch Pubs & Co estate. Survey responses were reviewed for completeness, and after exploratory data analysis and cleaning, a final sample of 207 valid participant responses was identified for the analysis. Of these, 110 were from L&T Publicans, and 97 from MP-run pubs. Despite a similar number of L&T and MP Publicans responding to the survey, this represents a higher response rate among MPs, given they represent approximately 25% of the overall pub estate⁴.

Although the survey was distributed to the entire estate, it relied on voluntary responses and was not based on a random sampling process. Nevertheless, the resulting sample reflects a broad cross-section of pub types, locations, and operating models. This diversity of responses provides valuable insight into the range of social and economic contributions of pubs across the Punch estate and supports the robustness and relevance of the findings.

Both questionnaires consisted of structured items, detailed in Table 1. Questions were aligned with key themes, including employment, supplier spending, community activities, charitable involvement, and perceived social value. These themes directly informed the creation of the CEI, which will be presented later in the report.

³ The data provided by Punch to the authors includes both Punch's own internally gathered records and data sourced from Hospitality Data Insights (HDI), an external company that specialises in analysing UK consumer spending.

⁴ No significant differences were found between these L&T and MP groups throughout the investigation.

Table 1: Areas covered under each survey

Survey Section Items	Leased & Tenanted (Sample: 110)	Management Partners (Sample: 97)
Pub and Respondent Info	✓	✓
Employment and Staff Demographics	✓	✓
Supplier Relationships and Local Procurement	✓	✓
Business Environment and Challenges	✓	✓
Community Engagement and Support	✓	✓
Perceived Social Role of the Pub	✓	✓
Business Performance (e.g. Sales, Expenses, Revenue)	✓	<i>Already Known⁵</i>



⁵ Punch Pubs & Co. maintains profit and expense records for all MP pubs across its estate. As a result, there was no need to include a business performance section in the survey for this group.

2.2 Phase II: Rationale and Background

Phase II examined how pubs serve as community hubs and ‘third places,’ promoting social interaction, inclusion, wellbeing, and belonging. The data collection comprised semi-structured interviews and focus groups with Publicans and local customers to explore how pubs foster community and connection. Specifically, we explored the processes that explain how the social interaction and community engagement activities in pubs are linked not only to the wellbeing of individuals within the community, but also to the business success of the pub. The analysis developed in Phase II addressed the following research questions:

1. How do pubs and Publicans act as community anchors, and to what extent do pubs foster social connection and belonging?
2. How do pubs contribute to individual and wider community wellbeing, as perceived by Publicans and community members?
3. Which community engagement activities generate the greatest social value, and how do these relate to the components of the CEI from the quantitative analysis?
4. How do differences in Publican approach, pub type, or location shape social value and economic outcomes?
5. What are the barriers and enablers impacting Publicans’ desires and/or abilities to conduct community engagement and deliver social value? Are there structural, financial, and/or policy conditions that shape these capacities?
6. How does community engagement influence business performance and the resilience of pubs?
7. What recommendations can be drawn to help Publicans and policymakers strengthen the social and economic contributions made by pubs?

These research questions were used to inform the qualitative design and analysis. Three forms of qualitative data collection were undertaken (with sampling details provided in later sections):

1. Semi-structured interviews with **customers** across four pubs (31 interviewees), capturing detailed personal accounts of everyday pub use, relationships formed in these spaces, and the ways customers understand the pub’s role in their lives.
2. Focus groups with **customers** (four focus groups with a total of 38 participants), allowing groups to co-construct shared narratives of the perceived value and roles of the pub in their communities.
3. Semi-structured interviews with 12 **Publicans**, providing insights into their perceptions of their pub’s economic and social value from an operational perspective of the business.

Cumulatively, these three data sources collect information from 81 individuals, providing a comprehensive and very robust platform for our analysis, and allowing us to examine economic and social value creation from organisational, individual, and collective community perspectives. Publicans provided insights into management practices and community engagement strategies, while customers provided individual experiences and shared narratives developed within group discussions. This triangulation approach strengthened interpretive depth and the identification of the mechanisms through which social value emerges and interacts with pub business performance. Additionally, this approach allowed us to explore how comparable community values – such as wellbeing and the reduction of loneliness – manifest in a variety of social settings. In research on place and community, multiple-case qualitative designs are widely used because they support deep contextual analysis and facilitate triangulation among different participant groups and case scenarios.

Figure 1 shows pubs targeted in our investigation, located in different geographical areas and regions across England. For the purposes of this study, we identified eight pubs serving communities located in urban, suburban, and rural areas.

This choice allowed us to understand key demographic and economic characteristics of local pub visitors and their broader customer base.

Table 2 describes participants in both the customer focus groups and in-depth customer interviews. Considerable efforts were undertaken to ensure adequate representation across various age groups and backgrounds. Although certain imbalances were visible when examining the ranges within individual interviews and focus groups, the overall data collection process achieved sufficient variation and diversity among participants.

Individual interviews with customers were organised with the help of Publicans, selected among those who replied to the survey questionnaire. The purpose of individual interviews was to ascertain the impact of pubs on regular customers, examining their effects on social lives and their importance in terms of fostering socialisation and human relationships. Pubs selected were in different settings: one pub was located on the outskirts of a town [A]; another pub serving a community just outside a large conurbation [B]; a pub operating in a rural village [C]; and a pub located in outer London [D].

The four focus groups were also conducted in different locations, with the aim of exploring and examine the impact of pubs on local communities from group perspectives. Located in different settings, one pub was in a village whose economy is still predominantly based on farming [E], another pub was located in a village situated just outside a large conurbation [F], a third pub was located in central London [G]; and the last pub was in a rural area relatively close to a town about one hour from London [H].

Each focus group had a minimum of seven to a maximum of 12 participants and lasted between 50 and 90 minutes, with an additional 20-30 minutes allocated for preparation. Participants in the focus groups were selected among individuals residing in the local communities for longer than two years, with a few exceptions concerning the focus groups arranged in urban areas. The same criteria used for focus groups were applied to conduct the individual interviews arranged with customers, although these lasted between 15 and 30 minutes, with an additional 5-10 minutes allocated for preparation.

Before the start of each activity, participants were provided with a Participatory Information Sheet (PIS) explaining the aims and objectives of the research project and the scope of conducting interviews and focus groups. Participants were asked to read and sign a consent form explaining the ethical considerations of the project, indicating the usage and protection (anonymity) of the material collected, and authorising the use of such material for research purposes. All focus groups and individual interviews were audio-recorded; transcripts of the responses collected during sessions were then used for data analysis. Copies of both a PIS and consent form can be found in the Appendix.

The survey questionnaire and related analysis delivered in Phase I enabled us to acquire an immediate knowledge of the contexts in which Publicans are operating, providing a narrative account about both context and content. However, while the information collected via questionnaires generated fresh figures and robust quantitative information, these may still leave some issues related to rural pubs and their activities unanswered or under-investigated. For instance, Publicans' perceptions regarding the current economic climate, together with their views relating to their businesses and respective communities, did not transpire clearly in Phase I and therefore needed further investigation.

Therefore, to further corroborate evidence collected via questionnaires, and to verify and substantiate responses gathered via focus groups about pubs and their impact on the social and economic life of local communities, we conducted 12 in-depth interviews with Publicans.

Table 3 summarises details of interviewed Publicans, including location of their pubs, their experience in the trade and the length of their tenure at current premises. Interviews with Publicans served to further examine the impact of pubs on local communities; to identify processes related to the creation of social capital (e.g. provision of training, support initiatives); and to gather Publicans' views on the capacity and capability of local pubs. Each interview lasted between 20 and 30 minutes and was audio-recorded. Responses were then transcribed and used in the data analysis.



John Walker Tavern
Stockton on Tees

Boot Inn
Sutton

Figure 1: Pub and Community Locations for all Focus Groups and In-depth Interviews

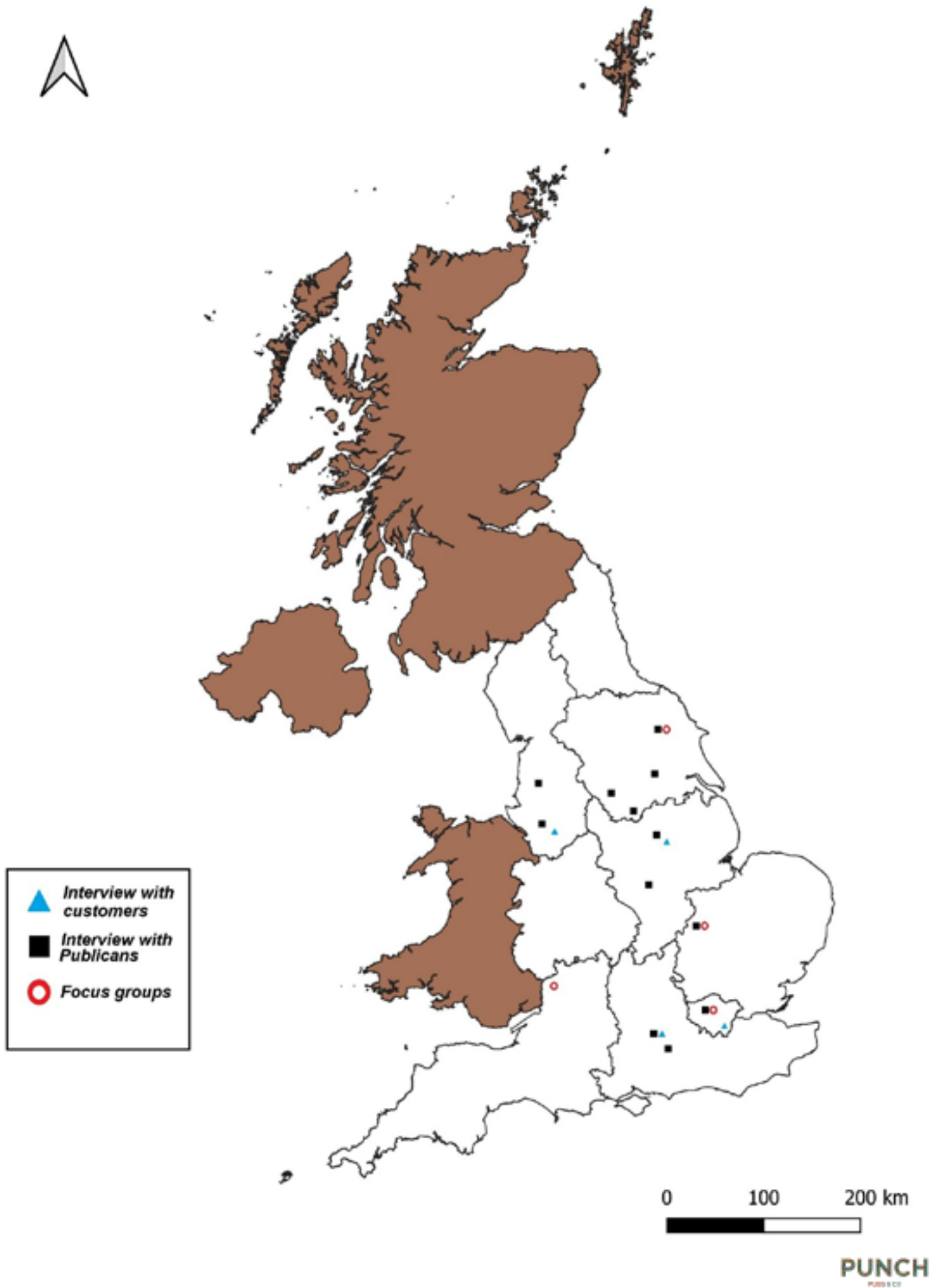


Table 2: Customer Interviews and Focus Groups – Descriptive Statistics

	Interviews				Focus Groups			
	A	B	C	D	E	F	G	H
Total Number of Participants	10	7	6	8	12	8	7	11
Gender								
Male	5	3	3	3	7	5	4	5
Female	5	4	3	5	5	3	3	6
Age Bands								
18-25	1	-	-	-	-	2	2	-
26-44	-	1	3	2	2	-	2	1
45-64	4	6	-	6	4	2	2	7
65 and over	5	-	3	-	6	4	1	3
Occupation								
Employed Full-time	-	4	1	2	3	2	4	2
Employed Part-time	1	-	-	1	2	2	-	1
Unemployed	1	1	-	2	-	-	1	-
Retired	7	2	3	1	7	3	2	6
Other (self-employed, freelance)	1	-	2	2	-	1	-	2
Type of Community/ Settings*	SU	SU	R	U	R	SU	U	R/SU

*R=Rural; U=Urban; SU=Suburban

Table 3: Publican Interviews – Descriptive Statistics

Pub	Context	Location	Type	Industry Experience	Current Pub Tenure	Management Type	FT/PT
1	R	North Yorkshire	Dining	18 years	15 years	MP	3/12
2	U	West Yorkshire	Wet	19 years	19 years	L&T	1/6
3	U	Derbyshire	Dining	20 years	8 years	MP	4/11
4	SU	Lancashire	Wet	9 years	3 years	L&T	2/6
5	SU	Cheshire	Dining	25 years	10 years	L&T	8/12
6	SU	West Yorkshire	Wet	15 years	10 years	MP	2/3
7	R	Derbyshire	Dining	25 years	4 years	MP	2/12
8	SU	West Yorkshire	Dining	22 years	4 years	MP	5/8
9	R	Hampshire	Dining	14 years	10 years	L&T	3/3
10	R/SU	Hampshire	Dining	8 years	8 years	MP	3/7
11	U	London	Dining	10 years	2 years	MP	5/18
12	SU	Cambridgeshire	Dining	30 years	6 years	L&T	6/15

*R=Rural; U=Urban; SU=Suburban; *MP=Management Partnerships; L&T=Leased & Tenanted.

3. Estimating the Economic Impact and Social Value of Punch Pubs

3.1 Descriptive Statistics

This section provides a set of descriptive statistics and an overview of key indicators derived from the survey sample. This data helps to contextualise the characteristics of the pubs included in the study. Figures reported in Table 4 present average values across all respondents from our survey of 207 Publicans, with standard deviations (SD) in parentheses.⁶ On average, each pub directly supports just over 10 employees within its operations, comprising over five full-time and nearly five part-time positions. Part-time staff typically work 11 hours per week on average, reflecting the flexible employment models commonly used in the sector. In addition, pubs employ seasonal staff, with an average of around 1.5 seasonal positions reported per year.⁷ Internally provided data shows that the average annual sales per pub were approximately £580K, underscoring the economic scale at which these establishments operate.

The analysis indicates that, beyond employment, pubs across the estate make a substantial and multifaceted contribution to their local economies through a diverse range of supplier relationships. On average, each pub spends approximately £468 per week with local suppliers and businesses. The largest areas of local expenditure are entertainment (£155 per week) and butchers (£94 per week). This procurement extends across a wide variety of other suppliers, including bakers, grocers, florists, security services and general consumables, highlighting the breadth of local economic activity that pubs help to sustain. These patterns illustrate the importance of pubs as consistent customers for a wide variety of local trades and services.

Beyond their economic contributions, analysis from our survey indicates that Publicans across the estate make a substantial and sustained contribution to local charitable and community initiatives. On average, each Publican supports more than three charities per year, while also encouraging their teams to dedicate time to community-focused activities. Across the estate, pubs contribute approximately 23 hours annually of staff time to these initiatives. Among those reporting any staff volunteering, which represents just over half of the pubs surveyed, this figure rises to an average of 45 hours per year. Within this engaged subgroup, approximately 10.5% can be considered 'highly committed', investing more than 75 hours of staff time annually.

Taken together, these findings highlight the substantial and multifaceted role that pubs play within their local communities. The work of Publicans underpins wider social cohesion through their positive impact on direct employment, charitable engagements, and support of local suppliers, which reinforces local value chains and helps keep spending circulating within the community.



⁶ No survey weights were applied to the data when calculating the descriptive statistics or in any of the subsequent analyses.

⁷ The questionnaire provided Publicans an example definition of seasonal workers as casual working for a period of eight weeks or less.

Table 4: Descriptive Statistics from Social Value Survey

VARIABLE	All Pubs Mean/(SD)
Full-time Employees (#)	5.21
	(3.92)
Part-time Employees (#)	4.85
	(3.66)
PT Hours Worked	11.29
	(3.87)
Seasonal Employees (#, year)	1.51
	(2.64)
Local Supplier (£-pw): Bakers	31.09
	(113.44)
Local Supplier (£-pw): Butchers	93.64
	(202.80)
Local Supplier (£-pw): Fishmonger	19.14
	(84.14)
Local Supplier (£-pw): Farmers	14.91
	(48.49)
Local Supplier (£-pw): Grocers	49.57
	(131.25)
Local Supplier (£-pw): Florist	4.55
	(9.69)
Local Supplier (£-pw): Consumables	35.71
	(60.33)
Local Supplier (£-pw): Security	20.05
	(63.32)
Local Supplier (£-pw): Entertainment	155.46
	(212.06)
Local Supplier (£-pw): Other Local Businesses	69.39
	(157.71)
Total Local Supplier Spend (£-pw)	467.77
	(581.28)
Charities Support (#, last year)	3.33
	(2.34)
Staff Hours Volunteered (#, last year)	22.93
	(55.71)
Total Annual Sales per Pub (£) (Internal Data)	580,316
	(321,636)

Table 5 presents estimated values of in-kind charitable donations calculated on a yearly basis across all pub respondents. These figures pertain to four distinct aspects of community charitable activities: the use of pub space for charitable and community purposes, donations of goods, value of sponsorships and the extent of advertising conducted to support local causes. On average, each pub contributes over £1,000 per year through providing the use of its space for community activities, alongside nearly £850 per year each in sponsorships and donated goods, and over £500 per year in advertising support. In total, these in-kind contributions are estimated to exceed £3,200 per pub per year. This level of support highlights the wide-ranging ways in which pubs contribute resources and facilities to benefit their communities.

Table 6 estimates the economic value of volunteering activities reported by participating pubs. Using the national living wage (21 and over) of £12.21 per hour as a reference for the economic value of donated staff time, the average estimated value of staff time contributed by volunteering is approximately £549 per pub per year. Among pubs with higher levels of engagement, defined as those reporting more than 75 hours of staff volunteering annually, this contribution rises to at least £916 per pub (based on the conservative assumption that these pubs contribute at least 75 hours per year). These estimates underscore the significant social value generated by voluntary activities that extend beyond the direct economic functions of the pub.

Table 5: Estimated Value of Yearly In-Kind Charitable and Community Donations

Estimated Yearly Spend, in-kind Charitable Community Activities	All Pubs Mean/(SD)
Use of Pub Space (£/yr)	1071.43 (2285.73)
Goods (£/yr)	842.34 (1580.39)
Sponsorships (£/yr)	848.21 (2080.95)
Advertising (£/yr)	515.62 (911.81)
Total In-Kind Spending (£/yr)	3266.20 (5677.29)

Table 6: Estimated Value of Yearly In-Kind Charitable and Community Donations

Pubs Reporting Staff Volunteer Activities*	
Annual Staff Volunteering Hours Estimate	Estimated Avg. (£ Value, using £12.21/hr)
Average: 45 hours	£549 per pub volunteering staff time
Highly committed pubs** (>75 hrs)	£916 per pub volunteering staff time

*51% of the sample **10.5% of sample

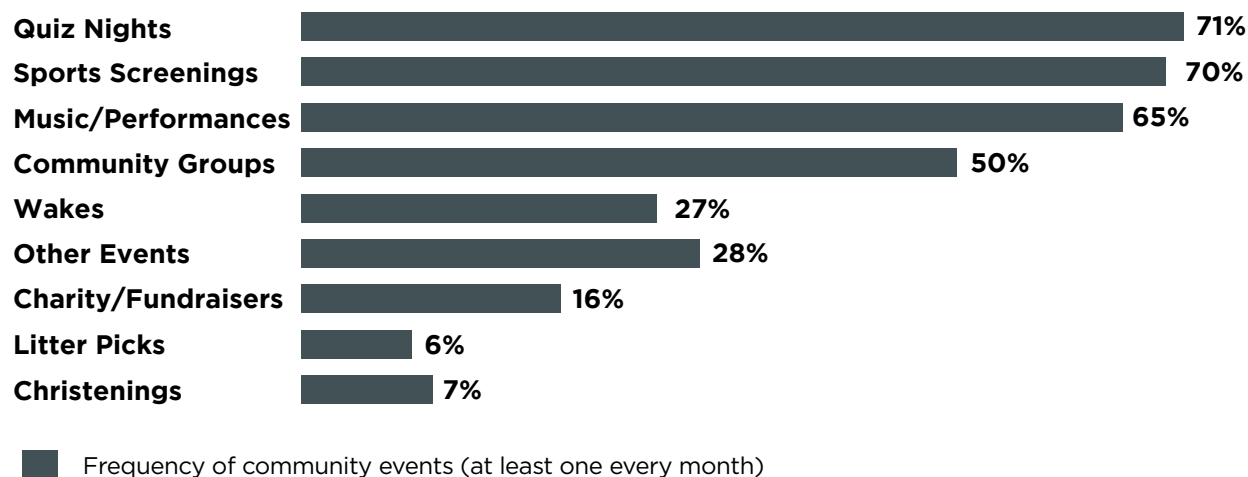
Figure 2 illustrates the breadth and frequency of community engagement activities hosted by pubs across the estate. The results show that a large majority of pubs regularly organise accessible and informal events that foster social interaction and community participation. Seven out of 10 pubs report hosting quiz nights and screening sporting events at least once a month, making these the most common forms of engagement. These popular and low barrier of attendance formats would attract a broad cross-section of community members, thus reinforcing social bonds.

Other meaningful forms of engagement highlighted in the data include music nights, hobby groups, and hosting community milestones such as christenings and wakes. A smaller, but notable proportion of pubs are also involved in civic initiatives such as local litter-picking, reflecting the role pubs can play in supporting environmental and sustainable community wellbeing.

Taken together, the findings from this analysis present a compelling picture of the economic and social value generated by pubs across the estate. Pubs are not only important local employers, supporting an average of over 10 staff members per site, but also active participants in local economies, regularly spending with nearby suppliers across a wide range of sectors. Beyond their economic importance, they play a vital social role by supporting more than three charities per year on average and providing in-kind contributions worth over £3,200 annually through free use of space, donated goods, sponsorships, and advertising. Staff also dedicate time to volunteering, with surveyed pubs contributing an estimated £549 in equivalent value each year and a notable proportion going significantly beyond that.

These results highlight the unique position of pubs as both economic drivers and community anchors that reinforce social cohesion, support civic life and strengthen the resilience of local communities and economies. Recognising these roles is important for policymakers, local authorities, and community stakeholders alike. It underscores the need for continued investment in the pub sector, both to preserve vital social infrastructure *and* to bolster the resilience of local economies.

Figure 2: Community Engagement by Event Type (Social Values Survey)



3.2 Modelling for the Economic Impact of Punch Pubs

Data gathered from the survey were used to estimate the economic impact generated by the surveyed pubs. Responses to questions concerning employment and expenditure towards local suppliers were compared against data provided by Punch. This analysis allowed for the calculation of a multiplier effect associated with the pubs' business activities. The multiplier applied in the analysis refers to how direct spending generates additional rounds of economic or social activity.

The total multiplier effect is gathered from three components: direct effect, indirect effect and induced effect. Direct effects are related directly to pub activities, for instance, wages paid to staff. Indirect effects refer to the knock-on effects that pub activities have on other businesses, for instance, on suppliers' income. Induced effects reflect the wider impact of pub activities, for instance, the additional aggregate demand generated by their activities within the wider economy (e.g. beyond spatial proximity).

3.2.1 Estimated Economic Impact - The Average Pub

Table 7.1 provides the estimated values relative to the economic contribution generated by surveyed pubs on an annual basis. Figures in the table indicate the individual average contributions associated with pubs based on responses gathered from the survey questionnaire (*Survey Estimate*) and calculated on internal data captured by Punch and associated with surveyed pubs (*PP Revenue Data*). Three types of estimates are provided: a lower estimate (Type I lower); a middle estimate (Type I middle); and an upper estimate (Type II).

The direct impact per pub per year is shown by wages, local procurement, total supplier spending and sales revenue, and the level of employment. In terms of wages, average values were extracted directly from the survey responses. The total annual economic contributions associated with wages only range from a lower estimate of approximately £220k to an upper estimate of £346k.

Each surveyed pub spends an estimated average of £24k on local suppliers, contributing nearly £56k to the wider economy when considering multiplier effects. When evaluating the overall impact of procurement, each surveyed pub spends approximately £116k per year. This amount more than doubles when considering the broader economic impact. Pubs employ an average of seven full-time equivalent (FTE) workers at their establishments. The employment impact within the economic system increases significantly, ranging from approximately 30% to nearly 90%, when including estimates related to employment multiplier effects.

Table 7.1: Estimates of the Total Economic Contributions per pub, per year [sample]

	Direct Impact Per Year	Annual Total Economic Contribution (sampled pub, N=207)		
		Lower Estimate	Middle Estimate	Upper Estimate
		Type I (lower) Direct + Indirect	Type I (middle) Direct + Indirect	Type II Direct + Indirect + Induced
Wages <i>(Survey Estimate)</i>	£150,476	£220,297	£237,752	£346,095
Local Supplier Spend <i>(Survey Estimate)</i>	£24,324	£35,610	£38,432	£55,945
Total Sales Revenue <i>(PP Revenue Data)</i>	£580,316	£849,583	£916,899	£1,334,727
Total Supplier Spend <i>(PP Revenue Data)</i>	£116,063	£169,916	£183,380	£266,945
Employment (FTE) <i>(Survey Estimate)</i>	7.04	9.69	10.35	13.24

3.2.2 Estimated Economic Impact – The Punch Pubs Estate

Table 7.2 shows the annual economic contribution of the Punch Pubs estate, based on surveyed data and internal records. The total wage contribution ranges from a lower estimate of approximately £278 million to an upper estimate of around £437 million when projections are based on survey data. The Punch estate contributes an average of £31 million to the local economy, amounting to over £71 million when considering multiplier effects. In terms of procurement impact, Punch allocates approximately £146 million annually, which is nearly two and a half times greater when factoring in expenditure within the broader economy (£337 million).

Full-time equivalent jobs are estimated based on survey data capturing full-time and part-time staff numbers at the pub level. On average, pubs reported around five full-time and four part-time staff, suggesting a typical staffing structure of roughly seven FTEs per site. These figures refer exclusively to pub-level activity and include the Publican in the employment estimate.

These figures do not account for employment generated by Punch’s central support functions. The analysis indicates that pubs across the Punch estate directly support approximately 8,900 FTE positions. The level of employment increases significantly when including estimates related to multiplier effects, nearly doubling when considering direct, indirect and induced effects across the broader economy. After incorporating these sector-specific effects associated exclusively with expenditure generated across the Punch Pubs estate, the estimated contribution to total economic output on an annual basis is between £1.16 billion (Type I multiplier) and £1.69 billion (Type II multiplier).

Table 7.2: Estimates of the Total Economic Contributions per year [population]

	Direct Impact Per Year	Total Economic Contribution (All pubs, N=1,264)		
		Lower Estimate	Middle Estimate	Upper Estimate
		Type I (lower) Direct + Indirect	Type I (middle) Direct + Indirect	Type II Direct + Indirect + Induced
Wages <i>(Survey Estimate)</i>	£190,201,664	£278,455,408	£300,518,528	£437,464,080
Local Supplier Spend <i>(Survey Estimate)</i>	£30,745,536	£45,011,040	£48,578,048	£70,714,480
Total Sales Revenue <i>(PP Revenue Data)</i>	£733,519,424	£1,073,872,912	£1,158,960,336	£1,687,094,928
Total Supplier Spend <i>(PP Revenue Data)</i>	£146,703,632	£214,773,824	£231,792,320	£337,418,480
Employment (FTE) <i>(Survey Estimate)</i>	8,899	12,248	13,082	16,735



3.3 Community Engagement Index

3.3.1 Rationale, Conceptual Framework and Components

There is no universally accepted method for measuring the size and value generated by a business through community social engagement activities. In the absence of a single standardised metric, the Community Engagement Index (CEI) has been developed to address this issue and meet the objectives of this study.

The CEI provides a quantitative measure assessing the degree to which the Punch Pubs' estate contributes to their local communities to generate social value. The CEI measures various aspects of engagement, encompassing the organisation of community events, participation in charitable activities, collaboration with local entities, and enhancement of community identity, heritage, and social fabric.

The CEI serves as a tool for facilitating the comparative data analysis of community engagement across the pub estate. Additionally, it supports broader initiatives aimed at quantifying the social value generated by business activities.

The CEI has been formulated based on an extensive review of academic literature pertaining to social value and community wellbeing. This defines community engagement as the active participation in the social, cultural and community life of a given locality. The CEI is a composite measure that represents the various aspects of community and social engagement, tailored to capture the specific context of the pub sector.

The domains captured include:

1. Community Activities
2. Charitable and Voluntary Activities
3. Engagement with Local Institutions
4. Contributions to Community Identity

A total of 21 component questions were utilised to capture these four domains, with each question being standardised to a common scale ranging from 0 to 1. The CEI was calculated with equal weightings across all 21 transformed components of the CEI as follows:

$$CEI_i = \left(\frac{1}{N}\right) \sum X_{ij}$$

Where X_{ij} is the normalised value X , for the component j , of pub i ; and N is the total number of components included in the measure.



Black Bull
Kirkby Stephen

Domain 1 – Community Activities

Component	Transformation
Event Frequency – Charitable	5-point ordinal scale recoded to 0-1 scale
Event Frequency – Quiz Nights	5-point ordinal scale recoded to 0-1 scale
Event Frequency – Music	5-point ordinal scale recoded to 0-1 scale
Event Frequency – Sports	5-point ordinal scale recoded to 0-1 scale
Event Frequency – Hobby Groups	5-point ordinal scale recoded to 0-1 scale
Event Frequency – Litter Picks	5-point ordinal scale recoded to 0-1 scale
Event Frequency – Christenings	5-point ordinal scale recoded to 0-1 scale
Event Frequency – Wakes	5-point ordinal scale recoded to 0-1 scale
Event Frequency – Other	5-point ordinal scale recoded to 0-1 scale

Domain 2 – Charitable and Voluntary Activities

Component	Transformation
Charity Engagement – # charities supported, last year	Min-max normalised (0-1)
Staff Volunteer Time – # hours on community projects	Min-max normalised (0-1)
High Volunteer Hours – staff >100 hrs in the last year	Binary: Yes = 1, No = 0
In-Kind Donation to Community – Free Use of Pub	Binary: Yes = 1, No = 0
In-Kind Donation to Community – Goods	Binary: Yes = 1, No = 0
In-Kind Donation to Community – Advertising	Binary: Yes = 1, No = 0
In-Kind Donation to Community – Other	Binary: Yes = 1, No = 0

Domain 3 – Engagement with Local Institutions

Component	Transformation
School Engagement – work with local schools / colleges to promote employment skills	Binary: Yes, or Want to = 1, No = 0
In-Kind Local Sponsorships	Binary: Yes = 1, No = 0

Domain 4 – Contributions to Community Identity

Component	Transformation
Social Value – Loneliness Agrees pub is vital in combatting loneliness	Binary: Agree = 1, Else = 0
Social Value – Inclusive Spaces Agrees pub is an inclusive space for the community	Binary: Agree = 1, Else = 0
Social Value – Identity Agrees pub is key to community identity and heritage	Binary: Agree = 1, Else = 0

3.3.2 Interpretation of the CEI

Composite indices, such as the CEI, aggregate multiple indicators across various domains into a single value through normalisation and weighting. The CEI encapsulates four aspects of community engagement within one numerical value per pub, ranging from 0 to 1. Rather than interpreting specific values of a composite index, it is advisable to use them to investigate trends over time and relative rankings between groups of interest, such as differences in community engagement between pub types or location.

Figure 3 presents a bar graph showing the distribution of CEI scores for all pubs included in the survey. Across the estate, the data indicates that pubs demonstrate a strong and sustained commitment to community engagement activities. To provide further detail on the ways pubs support their communities, the index was decomposed into four domains: Community Activities, Charitable and Voluntary Contributions, Engagement with Local Institutions, and Community Identity. For each domain, the CEI component scores were rescaled between 0 and 1 to enable consistent comparison across domains.

Figure 3: Community Engagement Index

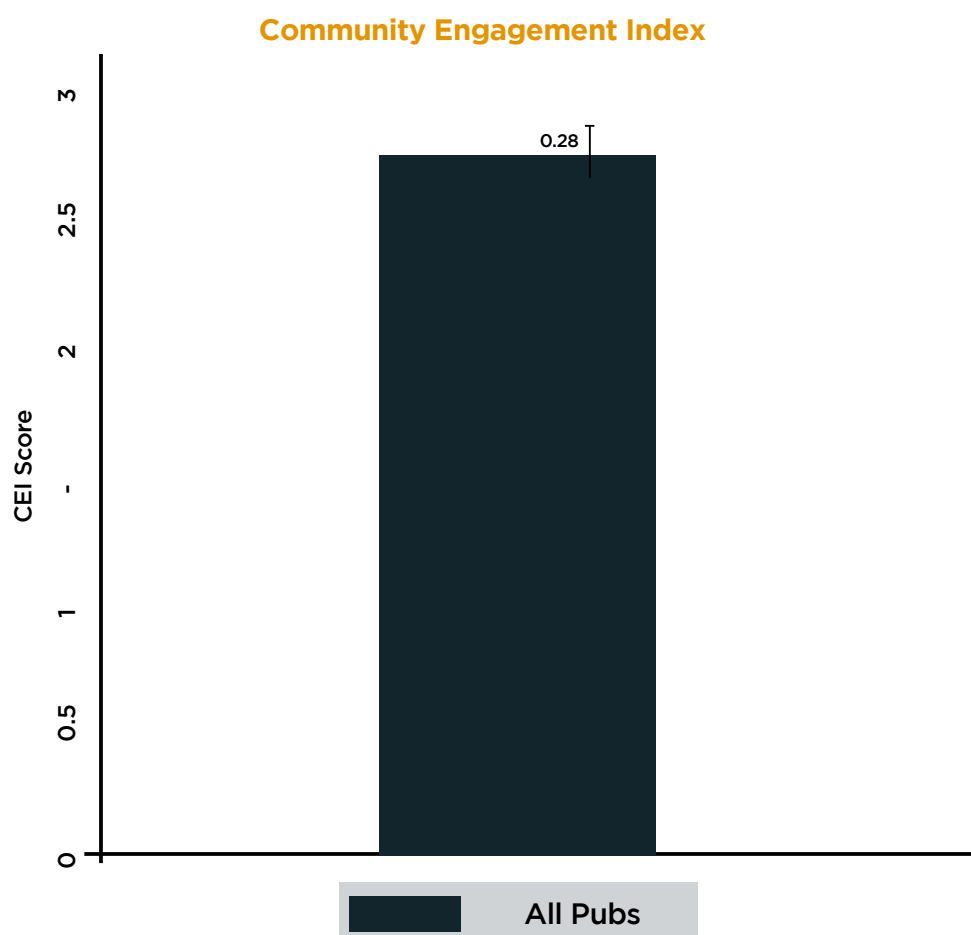
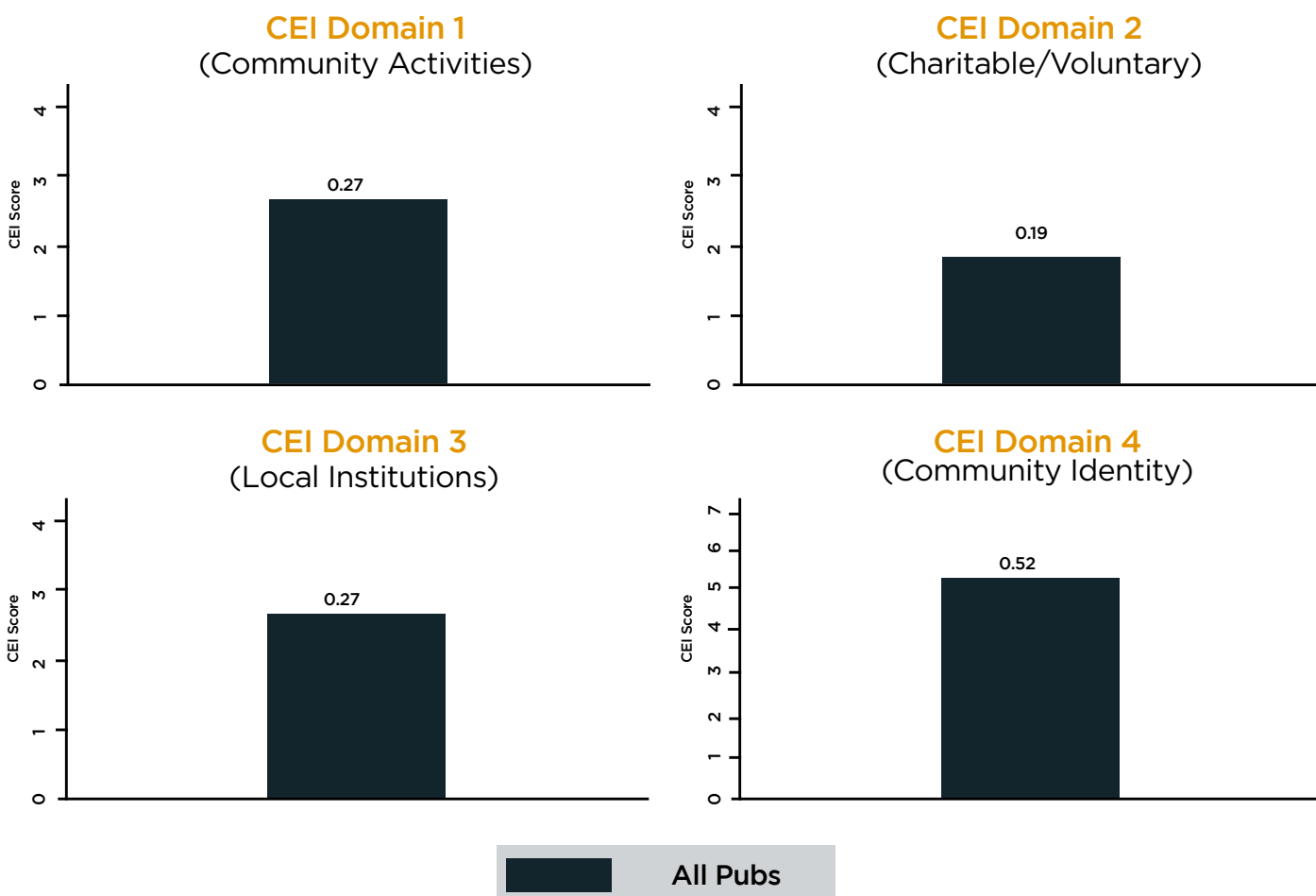


Figure 4 shows these rescaled average domain scores, offering a clearer view of the areas where different forms of engagement are concentrated. The results indicate that pubs contribute meaningfully to social value creation across all domains, with particularly high scores in Domain 4 (Community Identity). This reflects a widespread perception among Publicans that pubs play a central role in fostering belonging and connection within their communities. The data demonstrate that pubs make substantial contributions in each domain, underscoring the breadth and depth of their local impact.

These findings highlight the broad commitment of Publicans to supporting their local communities in diverse ways. In this sense, pubs are far more than commercial venues – they are vital community hubs that provide inclusive spaces for social interaction, support local organisations and charities, and contribute to a shared sense of identity and belonging. Taken together, the evidence underscores the important role that pubs play in fostering social cohesion, combating loneliness, strengthening local networks, and sustaining the cultural fabric of the places they serve.

Figure 4: Community Engagement Index by Domain



3.3.3 CEI Heterogeneity Analysis: Urbanity and Regional Features

The extent of community engagement may vary significantly across different spatial contexts. For example, the levels of civic engagement, the distribution of public funding, and the presence of other community institutions can differ among various regions. By examining CEI heterogeneity across geographical regions and the urban or rural status of pubs within our sample, we aim to identify the spatial differences of community engagement for pubs across the UK.

Firstly, we conduct a series of ANOVA (Analysis of Variance) tests to determine if there are significant differences in average CEI scores between urban and rural pubs. This aims to assess whether pubs in rural areas play a more significant role in community life due to the potential absence of other social infrastructure. Secondly, we examined whether average CEI scores differed significantly across UK regions (e.g. North East, South West, London, etc.). Our analysis indicates no significant difference in CEI scores between urban and rural settings.

This finding is robust to alternative model specifications, including models that use a three-category urban/semi-urban/rural classification. This pattern is clearly evident in Figure 5, which shows that mean CEI scores are broadly similar across all three categories, with only minor, statistically insignificant variation.

However, there is evidence of some notable regional disparities in CEI. Specifically, surveyed pubs located in the North East, South West, and North West exhibit statistically significantly lower CEI scores compared to pubs in London. Figure 6 visualises these differences, with London pubs reporting among the highest levels of community engagement, while several other regions cluster below the average CEI value calculated for London. Taken together, these findings suggest that while location type (urban, semi-urban or rural) does not appear to be associated with systematic differences in community engagement, regional factors may play a role in shaping the extent to which pubs are embedded in their local communities. This tentative evidence will be explored further during Phase 2 of the research through qualitative interviews, which aim to better understand the contextual and regional factors underpinning these differences.

Figure 5: CEI Score by Pub Urbanity

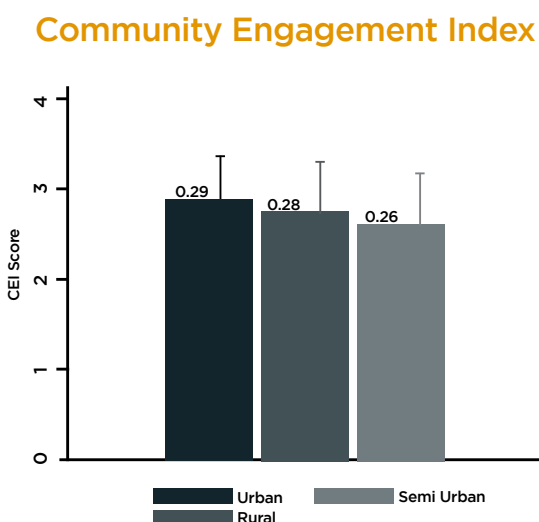
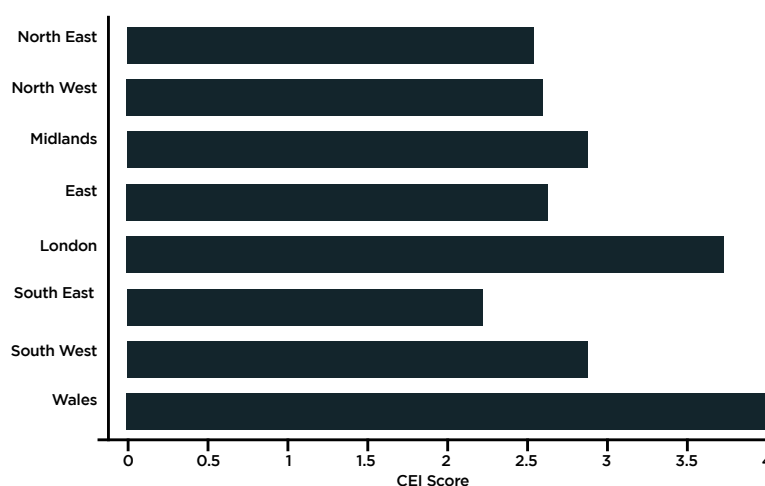


Figure 6: CEI Score by Pub Region



3.3.4 Economic Impact by CEI Score

Understanding the heterogeneity in CEI is important not only to describe variation in engagement across the pub estate, but also to assess the predictive power and potential role of community engagement as a driver of business performance. Pubs that are more socially embedded may benefit from stronger customer loyalty, more frequent visits, and broader community support – all factors which could translate into higher sales.

To further investigate this relationship, we divide the CEI index into tertiles (low, middle, and upper) and estimate the following Ordinary Least Squares (OLS) regression model of annual pub sales:

$$Sales_i = \beta_0 + \beta_1 CEI_{middle_i} + \beta_2 CEI_{upper_i} + \epsilon_i$$

Relative to pubs in the lower tertial of CEI score, and capture the effects on annual sales that are associated with being a pub in the middle or upper tertiles of CEI, respectively. The results of the regression analyses, reported in Table 8, indicate a statistically significant, positive association between community engagement – measured using the CEI – and total annual sales revenue.

Compared with pubs classified in the lower tertial of the CEI distribution, those in the upper tertial have, on average, £92,835 higher annual sales. This difference is statistically significant ($p < 0.10$). These findings are consistent across the four different domains of CEI.

To investigate this further, we estimated a Poisson regression model using annual sales as the dependent variable and the CEI score as a continuous independent variable. This model estimates the conditional mean of sales as an exponential function of CEI (i.e. estimates the impact of CEI scores on sales on a log scale).

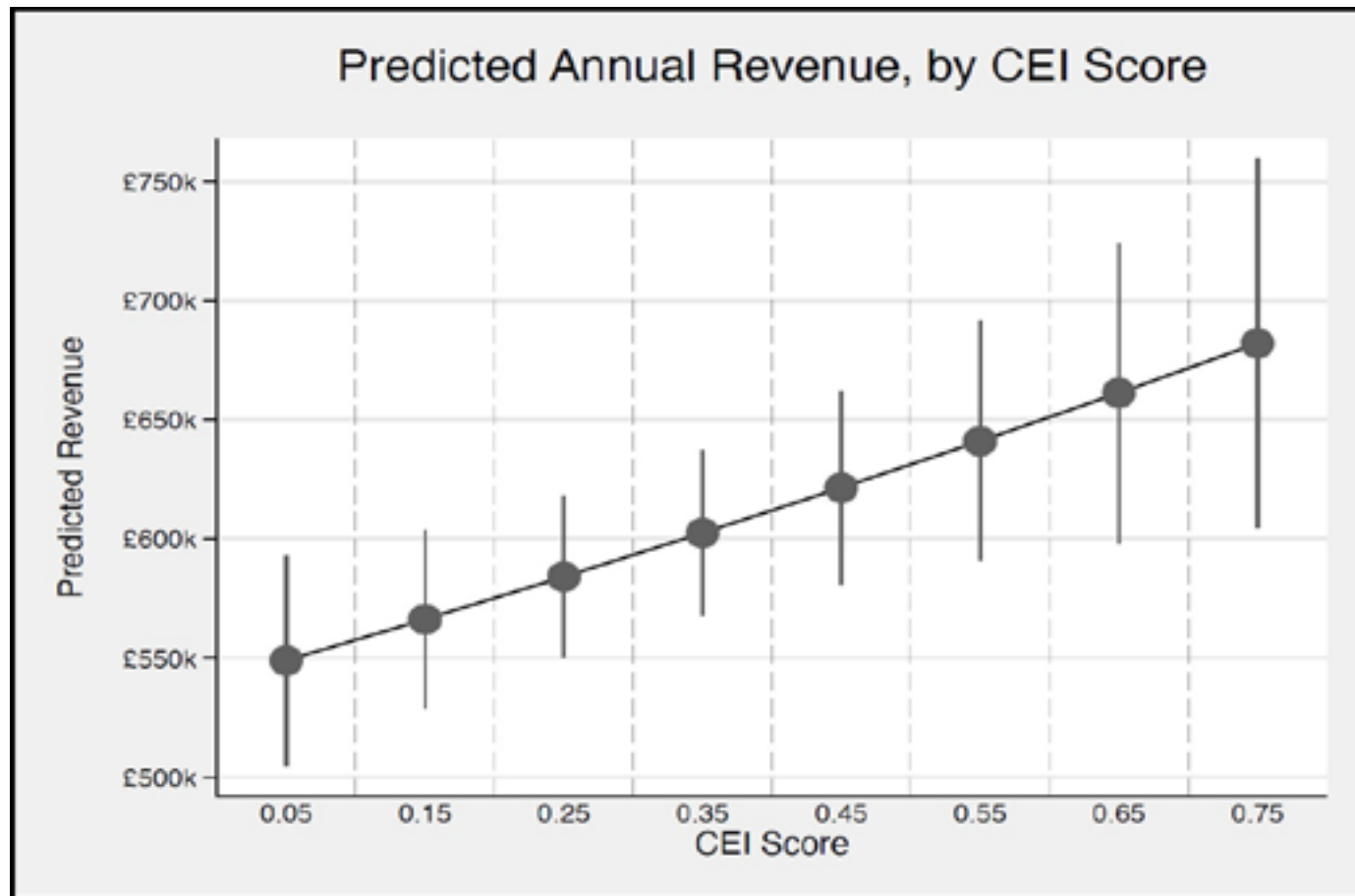
To facilitate interpretation of the model's coefficients, we estimate predicted margins of expected sales at a series of fixed CEI values, extending up to the 99th percentile of CEI scores observed in the data. These results are presented in Figure 7, which illustrates the predicted total annual sales which are associated with specific values of the CEI index. These estimates can be used to quantify the extent to which higher levels of community engagement are associated with increased sales.

Figure 7 shows a clear positive association between higher levels of community engagement (higher CEI scores) and predicted annual sales performance. At the average level of community engagement observed in the sample (CEI = 0.28), the model predicts annual sales of approximately £580K. Pubs with lower CEI scores (e.g. 0.05) display average predicted sales of around £550K per year while those with higher levels of engagement (e.g. CEI scores closer to 0.75) are associated with predicted sales approaching £700K. This consistent upward trend supports the argument that stronger community engagement is linked to better commercial outcomes.

Table 8: Regression analysis, heterogeneity of sales by CEI

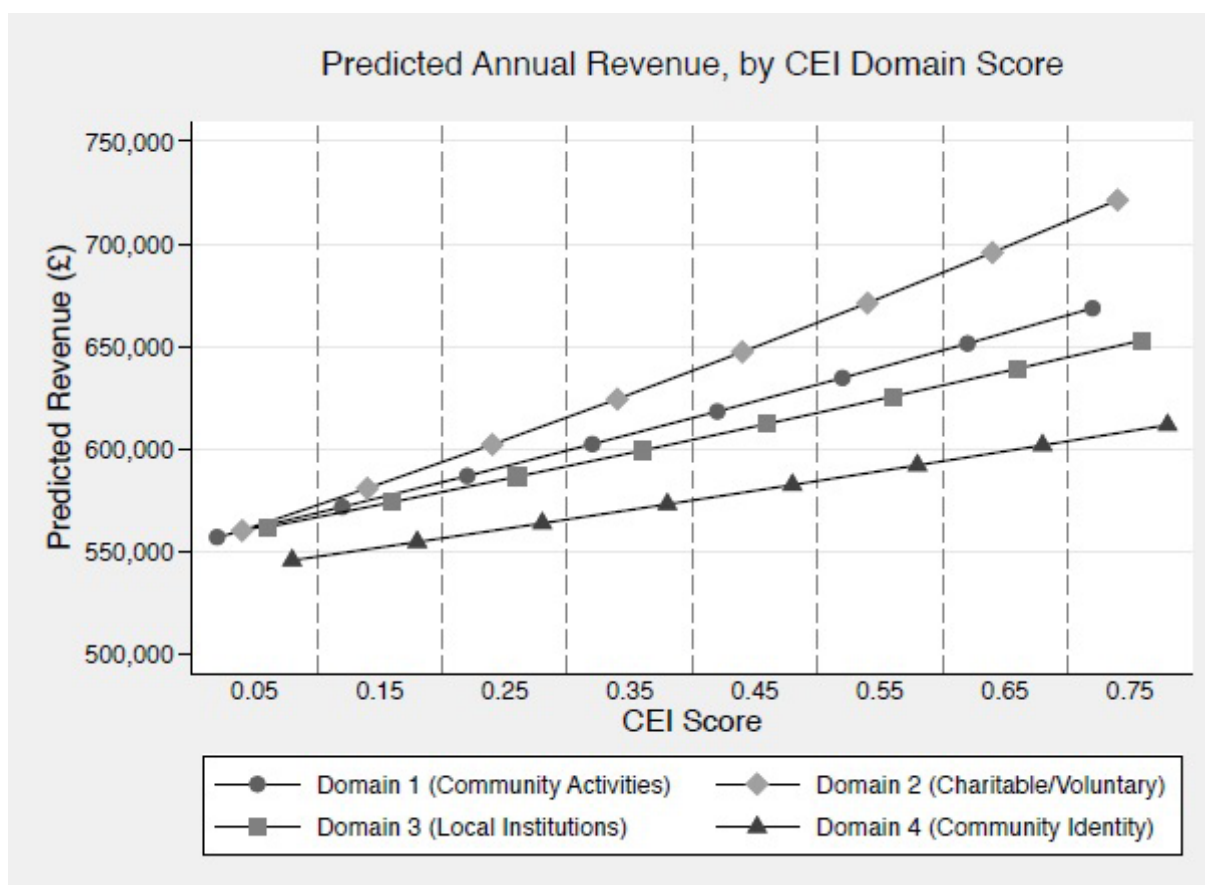
Dep Var: Sales Variable	Coefficient	Std. Error	t-statistic	p-value
CEI Tertials (Ref: lower tertial)	£64,354	52,754	1.22	0.224
Middle CEI Tertial				
Upper Tertial	£92,835	47,275	1.96	0.051

Figure 7: Predicted Annual Sales Revenue by Community Engagement Level (CEI Score)



To explore whether specific aspects of community engagement are more strongly associated with sales performance, Figure 8 presents predicted margins from Poisson regression models estimated separately for each of the four CEI domains. Each line shows the predicted annual revenue associated with increasing levels of engagement in that domain. The results indicate that higher scores in all domains are linked to increased predicted revenue, though the strength of these associations varies. Of note are the Charitable and Voluntary Contributions (Domain 2), which show the steepest positive relationship, suggesting that pubs more active in charitable engagement tend to report higher annual sales. Conversely, Community Identity (Domain 4) shows a flatter, more moderate association with sales. Although these patterns are informative, it is important to note that CEI domains are not independent, and engagement in one area often overlaps with engagement in others, making it difficult to isolate distinct effects. To build on these findings, Phase 2 of this project will include qualitative interviews with Publicans and pub guests. Analysis of this qualitative data will help clarify how different types of community engagement contribute to business outcomes and provide a richer context to interpret these quantitative associations.

Figure 8: Predicted Annual Revenue by CEI Domain Score



The results presented in this section support the argument that community engagement is not only socially valuable but can also be economically beneficial for pubs, reinforcing the importance of Publicans fostering strong local ties through inclusive community engagement. The analysis shows that pubs investing more time and energy into their local communities (hosting events, supporting charities, and collaborating with local organisations, etc.) tend to achieve stronger sales outcomes.

This evidence further reinforces the findings from across our research: community-focused pubs not only enhance social value and cohesion, but they also tend to be more commercially resilient. For policymakers and stakeholders, these findings underscore the benefits of supporting pubs to deepen their role as trusted community hubs. Fostering strong community engagement is not just good for the localities which these pubs serve; it is also good for business, adding to the case for investing in community engagement as a pathway to sustainable success across the sector.

4. Findings from Interviews with Customers: Thematic Analysis

The analysis established a quantitative evidence base evaluating the significant economic and social value generated by pubs across the Punch Pubs portfolio. Using survey data combined with internally provided company data, we measured several tangible indicators of value, such as the economic value generated from employment, wage expenditure, and local supplier spending, as well as the social value generated from volunteering activities and in-kind donations made by pubs to their communities. The CEI, developed to quantify the intensity of social value generation across the estate, revealed a strong positive association between community engagement and the economic performance of pubs.

Thematic analysis of the qualitative dataset was conducted using Braun and Clarke's (2006) reflexive approach, which provides a widely used and rigorous framework for identifying patterned meaning in qualitative data. This approach is grounded in the view that meaning is not just discovered in the data but is interpreted through the researcher's analytic engagement with it.

First, interview and focus group recordings and transcripts were listened to and read multiple times to ensure familiarity. The data was then coded inductively, attaching concise labels (initial codes) to capture recurring ideas, common phrases, experiences, and other meaningful features across the dataset. Open coding was conducted iteratively, allowing multiple possible interpretations to be recorded during the early stages.

Although our analysis was largely inductive in nature and remained grounded in the narratives of each participant, it was also informed by an awareness of the overarching aims of the study and the findings from Phase I. In practice, this meant that we did not force the data into predefined categories; our interpretation was guided instead by a deductive awareness of the conceptual framework of the research and the findings from Phase I. For example, attention was given to issues relating to the CEI, social value creation, and the potential mechanisms that might help explain the strong link observed in Phase I between community engagement and a pub's economic performance.

Once coding had been applied to the dataset, these codes were iteratively grouped into broader categories and refined into higher order themes that reflected shared meanings across participants. Initial themes were then refined recursively, checking their validity across the dataset and ensuring that each theme captured a meaningful aspect of community life within the pubs studied.

The final set of themes was then defined and named, supported by detailed analytic accounts in the results and discussion sections of the report that explain the underlying meaning of each theme in a broader narrative structure of how we found pubs generate economic and social value. The analysis resulted in five overarching themes, each reflecting a distinct way customers understood the role and value of their local pub:

- **Theme 1:** The Pub as a Community Anchor
- **Theme 2:** Belonging, Friendship, and Wellbeing
- **Theme 3:** Community Support and Local Contribution
- **Theme 4:** Economy and Employment
- **Theme 5:** Meaning, Memory, and Continuity

These thematic patterns recur across all pub sites, although their specific expression varies with local context and customer type. The subthemes associated with each theme are presented in Figure 9.

Figure 9: Overview of Themes and Sub-Themes from Customer Interviews



4.1 Theme 1: The Pub as a Community Anchor

Across all four locations, customers consistently described their pub as a steady, familiar place that punctuates their lives and gives shape to their weekly routines. For many participants, it was simply somewhere to go after work to relax and unwind.

“Every Friday I come here. That’s my getaway ... I’m a single dad to a young boy.”
[Participant 6, Pub A]

Most described following a recognisable pattern of days and times in visiting their pub. These routines are important parts of their social lives, with one customer stating:

“Once a week. Monday. Monday, dinner time. We always come... If we stopped coming here on a Monday, we’d miss it.” [Participant 7, Pub A]

One retired woman described coming to the pub routinely during the day for an hour or two, usually every *“Wednesday, Friday, [and] Saturday”*, commenting on the quality of food and the welcoming atmosphere. *“I feel I could come here on my own ... it’s like having another family”*, and when you’re having a bad day, *“you come out here, and somebody’s bound to cheer you up.”* [Participant 8, Pub A]

Several interviewees emphasised the importance of keeping part of their week clear to make sure they could continue their routine of socialising at their pub. One noted, *“We always like to keep Monday free for ourselves,”* [Participant 7, Pub A]. In another pub, a participant noted keeping Tuesday night free to take part in the weekly quiz with their friends; a ritual which they have been doing for over five years, underlining how routinely pub-going is actively protected in their weekly schedules:

“So, this [pub] in particular, we come on a Tuesday night for the quiz... a group of friends, we all come in, five or six years now.” [Participant 1, Pub B]

These routines were rarely framed as simply 'going for a drink'. Instead, participants explained that the pub provides structure, purpose, and a reliable reason to leave the house. This was especially important for individuals (often men) living alone, who said the pub breaks up otherwise quiet days.

One customer noted their usage of pubs as a social space increased since beginning to work from home regularly, after a job change. They state: **“When you work from home ... we sometimes use this as a place to come and have a chat. ... That would be quite hard if it wasn't there.”** [Participant 2, Pub C]

For others, especially those living alone who are also retired, the pub functions as a vital community anchor by providing somewhere to chat with others:

“When you live on your own, and you don't talk to anyone other than your dog, it's just good to have a conversation with somebody that you've met through here. So, this is like a community hub.” [Participant 2, Pub B]

Geography played a role in how this anchoring effect was experienced. In the rural and semi-rural pubs, customers often emphasised the lack of alternative venues. The pub was seen as one of the few remaining shared spaces, sometimes the only one in places where other amenities (shops, garages, and other small businesses) have closed. As one participant living in a rural village put it:

“This is basically what we've got as a community space... there's nowhere else... no hub of the village where people congregate.” [Participant 1, Pub C]

In contrast, customers in more urban pubs described having many other places nearby (pub and alternative socialising environments) but still identified their pub as a unique part of their routine. There may be alternatives if the pub did close, but they valued their local's atmosphere, predictability, and the fact that it *“feels like home”* in a way the alternatives do not. As one customer from a pub in London expressed:

“This is my local one. It's close to home, very friendly, small, nice, easy to have a quiet drink after work.” [Participant 3, Pub D]

Across geographies, people emphasised that the pub provides an anchor for their social network. Regulars expect to see familiar faces and can predict who will be around at certain times. This predictability contributes to a sense of belonging and continuity. One customer captured this succinctly when talking about visiting on their own: *“Give it 10 or 30 minutes and someone who knows me will walk in.”* [Participant 7, Pub B]

The significance of the pub became particularly clear when customers talked about the possibility of it closing. Many expressed that they would feel isolated or at a loss without it. As one noted simply: *“If this closed, I'd have nowhere to go.”* [Participant 7, Pub B]

Overall, Theme 1 captures how pubs act as a central reference point in the everyday lives of the people who use and rely on them. Pubs are a place where routines happen, new relationships are built, and old relationships are maintained. The pub was seen as a place where people feel grounded within their community. This was encapsulated powerfully by one participant when asked about the consequences of closure:

“There'd be a lot of disappointed and upset people... It's become the centre of the village now.” [Participant 6, Pub C]

4.2 Theme 2: Belonging, Friendship, and Wellbeing

Interviewed customers tended to describe a strong sense of belonging associated with their pub, often comparing the pub to a second home or an extended family. People spoke about feeling recognised, welcomed, and valued when they walk through the door.

“...it’s like the guys are your family. So, you can walk past, you can wave, you can just drop in with the dog, you can just come in for a quiet pint, or you can come in for a mad evening.” [Participant 4, Pub B]

A key part of this belonging came from the familiarity and attentiveness of staff. Customers emphasised how valued it was to them when staff remembered their names, asked about their lives, or stopped for a genuine conversation rather than a quick hello: “They don’t just say, ‘hello’ ... they’ll actually sit and talk to you.” [Participant 6, Pub A].

Other participants spoke about having a particular place within the pub (which is often reserved by the Publican for them) that reinforces their sense of familiarity, routine, and belonging. For example, one customer, while talking about meeting friends weekly, stated: “The table there [pointing] is where we sit ... about six chairs ... we’re all friends.” [Participant 4, Pub A].

Personal recognition also extended to staff knowing customers’ preferences and routines, as illustrated by: “They know that he [referring to her husband] has cheese and onion pie every week, so it’s there ready for him.” [Participant 7, Pub A]

Belonging also developed through the relationships formed with other regulars. Many customers explained that some of their closest friends, social groups, or weekly routines originated from meeting people in the pub. People described meeting new friends at quiz nights, through hobby groups hosted by the pub, or simply from sitting in the same spot each week, talking with people.

One younger woman describes how she and her friends have: “made friends with a few older men that always come in every week ... we’ve bonded with them.” [Participant 1, Pub A]

Publicans were described repeatedly as being good matchmakers for individuals on their own or for connecting different friend groups. On a busy New Year’s celebration at one pub, a customer describes how their Publican:

“Paired quite a few of us up with the locals, who have become very good friends. We’re all going on a holiday together, actually [soon].” [Participant 4, Pub B]

Not all relationships were deep ones. Some customers valued the lighter, everyday social contact – familiar faces, casual chats, and small interactions that break up the monotony of the week. As one customer explained:

“...probably not friends, but people who we... would smile and say hello... a community kind of thing... we weren’t looking for friends, we were looking for somewhere nice to go.” [Participant 6, Pub B]

For many, the relationships formed in the pub directly supported their wellbeing. Customers spoke about the pub helping them cope with loneliness, caregiving responsibilities, stress, bereavement, or health difficulties. They described the pub as a safe place where they could “*get things off their chest*”, relax, or feel emotionally supported – “getting out for an hour for, you know, your mental health.” [Participant 4, Pub D]

A retired man commenting on both the problems in accessing mental health care and the support that his pub provides put it succinctly:

“It’s like a doctor’s surgery type thing, isn’t it? Except you don’t have to wait 13 weeks to see the doctor for this!” [Participant 2, Pub A]

Other participants described the pub team as active listeners and informal counsellors:

“She’s the landlady, but she’s still our friend... she’ll sit there, listen to your problems, try to give you advice.” [Participant 7, Pub D]

Importantly, belonging and wellbeing were tied to feelings of safety and inclusion. Customers stressed the absence of ‘rough’ behaviour and praised staff who would ‘put a stop to it’ if someone came in too drunk. This was especially evident among women interviewed, several of whom described feeling uniquely comfortable visiting their local pub alone. As one woman put it:

“I’m quite happy as a woman ... would never have gone into a pub on my own [in the past] ... would be happy coming here – that’s really important to me.” [Participant 6, Pub D]

Others highlighted examples of inclusive, non-judgemental behaviour, such as one parent describing bringing their child, who has autism and is non-verbal, into the pub:

“I brought my son in a couple of weeks ago. He’s autistic and non-verbal ... But the amount of people that were just coming over to him and, I mean, trying to acknowledge him ... that was absolutely amazing.” [Participant 6, Pub A]

The sense of wellbeing was also tied to the atmosphere created by staff and regulars, described variously as light-hearted, friendly, and uplifting. People described the pub as a place where they can laugh, unwind, and escape from the pressures of everyday life. As one couple put it:

“It’s so easy to just walk in, sit down, everybody is friendly ... we always have a joke and a laugh with bar staff.” [Participant 7, Pub A]

Overall, this theme shows how belonging and friendship are not incidental by-products of pub visits, but central reasons why people come back. The pub provides emotional support, social connection, and a sense of being part of something larger than oneself – contributing directly to individual wellbeing. One customer summed it up when considering the consequences of their pub closing:

“It would be a tragedy ... so many people ... you want to come and have a place where you recognise and have a nice time and random people talk to you.” [Participant 6, Pub D]

4.3 Theme 3: Community Support and Local Contribution

Across all pubs selected for conducting customer interviews, customers described their local pub as a place that actively supports the wider community – not just a venue for drinking or eating, but a hub where people come together to help one another. Much of this support took organised forms led or facilitated by the Publican, such as charity events for a local hospice, fundraising walks, children’s events, parents’ clubs, village markets, village festivals, and outdoor music events and many more initiatives.

In one pub, the Christmas boxes and hamper schemes were strongly associated with the Publican’s own initiative. One participant explained:

“Every Christmas, she does about a hundred hampers for the local, poorer people... she puts in enormous amounts of money for it.” [Participant 1, Pub D]

Customers frequently mentioned how Publicans play a central role in bringing these activities to life. They appreciated that Publicans are often the first to volunteer their space, time or resources when the community needs something.

“I used to run our school PTA (Parent Teacher Association) ... we did our PTA events here... [Publican’s name] kindly put on for us... didn’t charge us to hire the pub... provided nibbles.” [Participant 1, Pub C]

Beyond formal activities, much of the community support happens informally. Customers described numerous instances where pub staff or regulars stepped in to help individuals in need, whether by offering a lift home when public transport was cancelled/limited, providing food during hard times like during the Covid pandemic, or quietly helping people who were struggling emotionally.

“They did meals ... and I found it particularly useful; when Covid was on ... they still did deliveries.” [Participant 2, Pub A]

For many customers, the pub serves as a place where people share information, resources, and practical support. It functions as an informal community network. It is a place customers can find or be recommended a tradesperson, hear about local issues, or connect with people who can help with services, childcare, or attending local events.

As one participant put it, many of *“the lads in there have got different trades ... somebody wants a plumber, somebody wants a joiner [they can find one],” [Participant 4, Pub A]*. A different guest at the same pub shared thoughts on how these interactions foster community:

“You’ll meet a mechanic here who says, ‘we’ll help you out for “mates’ rates”’. It’s really a hub, isn’t it?” [Participant 2, Pub A]

The inclusiveness of these supportive behaviours was especially notable in more diverse or urban settings. People emphasised that the pub brings together individuals from different backgrounds, cultures, or life circumstances in a way that promotes mutual respect and builds community solidarity. One woman noted in a London pub that:

“This pub seems to retain the ability to have a far more diverse range of people ... feels more welcoming to everybody.” [Participant 6, Pub D]

In one pub, following an idea during a Church bereavement session, one older participant had an idea to create a men’s group and gather once a month. In the beginning, the group focused on men in the community who had become bereaved. This initiative has since expanded to encompass other men residing in the community, whether living independently or experiencing male loneliness, by offering structured social engagement opportunities for these individuals once per month. As one customer described:

“We use [the pub] on the first Wednesday, second Wednesday of every month, midday ... about anywhere between 10 to 15 guys ... all on their own ... just gathering and chatting and putting the world right. ... Started off with bereaved ... now it’s with guys that live on their own or guys that don’t get out.” [Participant 3, Pub C]

Other participants also explained that these layers of support create a strong sense of collective responsibility. When someone in the community faces hardship – illness, bereavement, financial strain – regulars often organise themselves informally through the pub to coordinate acts of care. A customer described how they supported a man who had recently lost his wife:

“We all said to him, don’t change your habits... come down and still enjoy your chat. That really helped him through his grief.” [Participant 5, Pub C]

Taken together, these accounts show that pubs act as important parts of the community fabric. Pubs serve as informal venues within communities, providing practical, emotional, and material support that is accessible without the procedural requirements associated with official support services. Community support is not an add-on for these people, but a core part of what makes the pub valuable to residents, and a clear example of the non-monetary social value generated within pubs every day.

4.4 Theme 4: Economy and Employment

Customers often spoke about the pub not only as a social space but as an important part of the local economy. Many described how their pub provides jobs for local people, particularly for young people taking on their first ever role in the workplace - *“my daughter worked here”* [Participant 1, Pub B]. They saw the pub as a place where teenagers and young adults can learn practical skills, build confidence and resilience, and develop good work habits.

One customer emphasised how the pub had supported their son not only in providing important employment, but also as something he now values for the sense of his community that the experience has instilled within him:

“My son ... ended up working behind the bar ... he actually feels that he’s got a sense of his own community ... all the regulars know him.” [Participant 3, Pub B]

These accounts highlight how pubs uniquely serve as early workplaces where young people acquire essential interpersonal and employment skills while feeling more of a part of the local social fabric.

Participants also recognised that pubs contribute economically beyond direct employment. Customers described how pubs purchase goods from nearby suppliers, attract visitors into the area, and help sustain neighbouring businesses. One interviewee from London noted that:

“They buy local produce from the shops... good connections with the local shops,” [Participant 1, Pub D].

Others across the four pubs associated their local with increased footfall from walkers, clubs, and sports teams – activities that help keep small local economies vibrant.

Although customers valued these positive economic contributions, many were aware of the financial pressures confronting pubs. Rising costs such as energy bills, VAT, business rates, employment, food prices, and inflation were all mentioned as significant threats to the viability of local pubs. As one participant put it, *“the Government is killing pubs ... business rates, charges, VAT ... gas and electric have gone through the roof.”* [Participant 8, Pub D]

These pressures were often understood as barriers affecting both pub operations and customers’ ability to visit as frequently as they once did. Even so, many regulars expressed a willingness to pay slightly more in order to enjoy a safe, well-run environment, with one customer saying, *“I’ll pay a bit extra for the quiet, no idiots kicking off.”* [Participant 7, Pub B]

Others explained that while prices had risen, their local pub still offered good value relative to alternatives. For example, one customer highlighted that:

“Great Sunday roast... lower than other pubs in the area... good competitive pricing,” [Participant 4, Pub D].

These reflections reinforce the idea that customers weigh the broader experience of safety, atmosphere, familiarity, and social connection alongside price when choosing where to spend their money. There is a widespread sense that the pub offers value that goes beyond simply serving alcohol.

“If it was just beer, there’d be two people here... it’d be empty.” [Participant 7, Pub B]

Participants frequently linked economic issues to fears of closure. Some described the loss of other pubs or community spaces in the area and stressed that losing *this* pub would have social as well as economic consequences, not only for staff, but for the rhythms of everyday community life.

These feelings are strongest in rural areas.

Overall, customer accounts show that pubs are viewed as a small but vital economic anchor, providing jobs and skills development (especially for young people), and contributing to the vibrancy of their communities.

4.5 Theme 5: Meaning, Memory and Continuity

Customers frequently spoke about their pub as a place deeply tied to personal and collective community memory. Many had been visiting the same pub for decades, sometimes across multiple stages of life, from early adulthood to parenthood and on into later years.

Long-term regulars spoke of visiting “*on average two times a week for the last 30 years*”, “*being here over 40 years*”, or having moved away and later returned to the same pub. These long-term attachments gave the pub a sense of emotional weight and continuity that went beyond its physical function as a venue.

Others described their local as “the family pub” across multiple life stages.

“I used to go every day... then I went down to hardly ever because I had two children... as they got older, I started going back... and this is their local as well.” [Participant 1, Pub D]

People frequently described the pub as a backdrop to important life events, including the place where birthdays (especially one’s 18th), anniversaries, retirements, sports tournaments, and family milestones are celebrated, or even more difficult moments, such as bereavements and post-funeral meetings. Beyond acting as a place to rent out for events, the pub provided a setting for connection during significant transitions, creating shared memories that linked individuals to the place and to each other.

“My daughter’s 27 now. She had her 18th birthday here... I had my [work] leaving party here... we had the baby shower here.” [Participant 6, Pub D]

Another customer recalled bringing his son to the pub for the first time to watch the 2012 Euros football final and still feeling very emotional about that shared memory between father and son.

“I brought my son here for the 2012 European Championships Final... we watched it in here... I still feel quite emotional about it.” [Participant 1, Pub D]

Customers also discussed how the pub had changed over time. Many long-term residents compared the atmosphere and design of the pub over many decades of regular use. The addition of relatively recent outdoor beer gardens was noted as a welcome change in two of the four pubs in this sample. Others focused on how they have seen their pubs go from more traditional alcohol-focused venues to mixed or food-focused pubs.

A 20-year regular and local resident commented that their pub used to be “more of a drinking pub when we first started,” [Participant 8, Pub A]. Although some opined about the loss of those traditional pubs, most either saw the change neutrally or welcomed it as a necessity for the running of a good pub these days. “Food. You’ve got to do food.” [Participant 5, Pub B]

Of notable universality was the importance customers placed on the Publican who runs their pub. Several of the pubs studied had histories of frequent managerial changes in quick succession. Across all four pubs in the customer interview phase, customers noted and were acutely aware of these shifts, leading some to stop using that pub totally. They often contrasted “before [name of current Publican]” with the present, emphasising that current management had “*done an awful lot in the space of three years*,” [Participant 5, Pub C] or another commented that their local pubs have always had a strong Publican in place:

“[Publicans] always make the place ... whereas if you just put general managers into pubs, it’s never the same. It’s soulless.” [Participant 8, Pub D]

“Never came really to this pub pre- [current Publican] ... didn’t serve food... wasn’t very nice... now it’s much busier and more of a hub of the village.” [Participant 1, Pub C]

What brought these people back was positive management changes that had led to transformations in the perceptions of the business.

One customer remembers a “grotty” pub with a “bad reputation”, before the current team transformed it into a clean and friendly pub that she enjoys using far more now

[Participant 6,
Pub B].

These descriptions showed how people see the pub as part of a longer story about their village, town, or neighbourhood. Some talked about the pub as one of the last remaining traditional spaces in the area, or as a place that preserves a familiar kind of social interaction that is disappearing elsewhere. On the topic of traditional pubs closing down:

“There used to be five, six, seven in [the area] that were traditional” [Participant 7, Pub D], with their current pub being the only one of its kind remaining.

A recurring concern among participants was the potential loss of this continuity if the pub were to close or change drastically. People said the closure would leave a gap not only in their routines but in their identity as a community. For some, the pub represented the heart of the neighbourhood and losing it would feel like losing part of themselves.

“There’d be a lot of disappointed and upset people... It’s become the centre of the village now.” [Participant 6, Pub C]

This sense of dread and loss was true for a wide range of customers. A local resident in a London pub mentioned their limited mobility and, “if this pub was to close ... I don’t know where I’d go [Participant 5, Pub D]. People rely on these social spaces to socialise and meet new and existing friends. Even where participants acknowledged that they could find somewhere else to eat, they emphasised that what would be lost are the memories, routines, and relationships specific to the particular pub.

“I might not see the people that I see on a regular basis... I think that’s quite sad.” [Participant 2, Pub B]

The theme also reveals a sense of wider cultural loss. Customers framed their local as one of the last spaces where a certain kind of friendly, mixed, “old school” pub culture survives, further intensifying their desire to see the place continue.

“People support people here. ... If you shut these institutions down, then something will be lost.” [Participant 2, Pub C]

Overall, this theme highlights the deep emotional and symbolic significance customers attach to their local pub. It is a place where memories accumulate, traditions are started and maintained, and people feel connected to their own histories as well as to the wider story of their community.



5. Findings and Discussion – Customer Focus Groups

5.1 Role of Publican and Sense of Community

General views collected from focus groups tended to resemble those gathered from individual interviews, and to confirm a relatively common perception of pubs among the different communities approached. Most participants expressed positive views about their pubs in relation to their own communities, frequently referring to their respective Publican as the key person at a local level, whose input and managerial style were seen by most as crucial for the establishment to attract both residents and non-local customers. Many were able to compare how their pub was run across different tenures over the years, and to identify small or large differences in the way the local community perceived their locals. A few excerpts below capture the substance:

“When you walked into the pub, the room would almost fall silent. Strangers not welcome, that kind of attitude. So, our local became a pub in the next village, and it was only when [the current Publican] came along that, for me, it changed completely.”
[Participant, FG1 Pub E]

“[The Publican is] creating this kind of autonomy and definitely investing a lot of time in running the way she’s running the pub, making you want to come more often. (...) Previously, we’ve had Publicans who were focused on the money. Publicans who came from totally different types of business [backgrounds] who thought ‘there’s your pint, go away’.” [Participant, FG4 Pub H]

Participants praised the opportunities created by pubs in terms of social activities, and the help and assistance provided by Publicans to communities in a multitude of different ways. For example, participants frequently described their pub’s function not only in terms of its core business operations but also as contributing to other nearby services and amenities. This included, for instance, providing parking facilities during peak times such as rush hours or school drop-off and pick-up periods.

“(...) The village school is mostly for people from outside the village who want their children to go to a village school, it’s very popular (...) [the Publican] allows the school traffic to park in the car park (...) he doesn’t have to do that, but at three o’clock if you’re in there he’ll be really busy, (...) so he encourages it, he’s told the school that you know they [the parents] can park in here.” [Participant, FG4 Pub H]

“The pub here invites members of the community and others to come together by providing its space for children’s activities and other events.” “You keep going, and community members still say, ‘This is our pub, but it can be used for other things too.’”
[Participant, FG2 Pub F]

“My husband works from home and has done for years and years. But he decided that he needed to talk to humans, and he now works a few shifts in the evening to help [the Publican] out, and he gets more out of it than I think she does ... It’s not about the money.” [Participant, FG1 Pub E]

5.2 Pubs and Alternative Third Places

The differentiation between pubs and other places for socialisation and engagement within communities was explored extensively during the focus groups. The locations selected [E-H] presented a wide range of businesses and facilities, such as churches, shops and, in three out of four cases, an operational community centre/hall. As these third places can foster social activities, generate social capital, and facilitate relationships among members of the community, it was important to investigate the type of distinctiveness, if any, that was associated with pubs.

Most participants drew clear distinctions between pubs and other social spaces – most often cafes – which they used for different forms of social interaction. Pubs were viewed as more adaptable spaces, capable of hosting a broader range of community activities.

For instance, charitable collections might occur in both pubs and churches, but participants noted that events such as language exchange meet-ups, art courses, and other hobby group activities were more likely to take place in the pub than in any other local setting.

“The knitting circle upstairs and keep fit in a room out the back and, you know, the bar in the front and so on and so forth. It’s still our pub (...) no matter what they do, everybody feels it’s still our pub.” [Participant, FG2 Pub F]

“I don’t live in the area [...] I come every week because I play board games here with a group of friends. Every Wednesday we come to play board games. But then during the weekend, I will go to my local pub.” [Participant, FG3 Pub G]

The focus groups examined potential concerns residents might have about their pubs, including whether they believe pubs contribute to antisocial behaviour in their area. Participants reported little to no connection between their local pubs and such behaviour, describing any incidents as rare and isolated within otherwise familiar community settings. Publicans were consistently seen as proactive guardians who set clear expectations and intervene early, helping to ensure a safe and welcoming environment – especially for women and older people.

“I can walk in here on my own as a woman and not feel awkward.” [Participant, FG1 Pub E]

5.3 Information and Skills

Participants described pubs as hubs for receiving first-hand information and knowledge on the most up-to-date happenings of the village and surrounding areas. Publicans were in many cases described as ‘those who know first’, as they were often the first ones to hear and/or know and the first point of contact to find out what was going on in the local area, mostly in relation to the supply and demand of casual jobs. Several participants were business owners themselves, and again, pubs were indicated as important assets for their own businesses, as they generally increased the attractiveness of the area, providing opportunities for other local businesses and suppliers.

“If you want to have an evening job or a Saturday job, it’s hard to get somewhere. You’re going to be travelling on a bus for a long time. Rite of passage, start pot washing and then you know, wages in, and it builds those skills, and it gets them part of the business.” [Participant, FG1 Pub E]

“I think people probably get a lot of recommendations from here... use this person for your plumbing and use that person for this... [the Publican is] like our Yellow Pages!” [Participant, FG4 Pub H]

In some cases, Publicans would facilitate networking and exchange information between those offering employment and those looking for employment, in a system that seemed based mainly on reputation and word of mouth. Particularly significant is the testimony provided by one of the youngest participants within the 18-25 age band, who described her first job at the pub and how this experience had a tremendous impact on her life:

“When I first joined [working at the pub], I was really, really anxious. I wasn’t attending school as much. And that [the work] completely changed me. (...) I did not know whether to do college... or to do a Uni course... And now, from the pubs, I’ve been able to do that just by building up social skills and confidence in myself, of, oh well, ‘I can do that’. And just giving things a go.” [Participant, FG2 Pub F]

The participant went on to describe how her confidence grew as she learned more skills on the job:

“It’s even just simple things like, oh, well, I didn’t know how to do that before. And now I’ve been shown [how to do it, and realising], oh, I can do it... Well, you’ve given it a go. You can do it. You know you can do it. (...) And then you take those skills onto everything else in life as well, to your success later.” [Participant, FG2 Pub F]

Strikingly, the participant views this time working in the pub as being the critical factor in helping her develop the confidence to go on to succeed in further education.

“I would not be able to have done college, or anything, if I didn’t work in a pub at all.” [Participant, FG2 Pub F]



6. Findings and Discussion – Publicans In-Depth Interviews

6.1 Changes in the Sector

Publicans interviewed indicated several changes occurring in the business since the COVID-19 outbreak, mainly associated with the cost-of-living crisis and recent changes in employers' employment contributions.

Firstly, many pubs had to reconfigure themselves and engineer new strategies to attract customers. There was a general perception that the last few years have been particularly tough in terms of acute business costs and overheads. Secondly, changes in the type of customer base were also highlighted by many, with a decline in custom from individuals between the 18 and 25 age band. Thirdly, there were difficulties for the business created by new legislative regulations and an increase in red tape, which generated new costs and challenges for the business, but, according to many, did not provide any evident return in terms of services. Fourthly, increased costs related to services and suppliers have affected business overheads significantly.

Interviewees seemed to agree on the fact that being a Publican today is much different from working in the sector 10 or even five years ago. The level of custom was much higher in the past, when most of the customers regularly visited their pubs during the week as well as the weekend, with no significant changes on a weekly basis. However, the situation today is much different, with locals visiting pubs less frequently and saving their visits mostly for the weekend.

“The village isn't very big. I would say maybe 30% of the village use the pub and it's certainly not enough to maintain it.” [Publican 1, Rural]

“I think our industry is always going to face challenges purely because it's based on customers coming in the door and spending money. There's local competition, new places get built, bus routes changing, the weather. There's so many things that impact your trade.” [Publican 3, Urban]

“It's definitely become harder. Quiet periods are lasting longer, and the time between a busy summer and Christmas now stretches beyond just October and November, even with events like Halloween, bonfire night, and half-term.” [Publican 6, Suburban]

A general increase in service costs and rates was another important factor explaining the business downturn mentioned across interviewees. For instance, the increases in employment costs and business rates, as well as the more recent rise in inflation, with the related squeeze in purchasing power, have exacerbated the situation for Publicans even more. VAT was also mentioned in interviews as a factor of further stress, with some acknowledging the necessity of paying duties and excises, although they complained about the heavy weight of these on their businesses.

“With rising employment costs, you're being forced to reduce staffing expenses. That then puts more pressure on your time, and you may not be, when it's busy in the pub, able to give that level of personal experience to your customers. Through the summer months, we've got a big beer car, we get really, really busy, and you can have people queuing out the door to get to the bar, and you know that you're not serving as quickly.” [Publican 6, Suburban]

“The recent National Insurance increase; that is a big thing for us. We had to lose 20 hours just to go back to where we were before the National Insurance rise. So, we either have to work an extra 20 hours or cut our employees' hours. [Publican 5, Suburban]

“The tax burden is huge; VAT is a massive issue. You’re often just moving from one VAT return to the next. Perhaps more could be done to make things easier. Of course, we’d all consider a VAT reduction, but realistically, that’s unlikely to happen.” [Publican 7, Rural]

“For example, my manager’s base salary is £800 per week, but with all the additional costs, it rises to £1,022. That means there’s an extra £222 on top of the base salary for just one employee each week - that’s a significant increase. (...) Of course, people need to earn enough to live, but as a business operating at our current level, we simply can’t afford it.” [Publican 11, Urban]

In regions typically defined by limited transportation networks and inadequate infrastructure, such as rural and peripheral areas, drink-driving regulations, alongside the proliferation of off-licence sales, have directly influenced customer numbers and are recognised as primary factors contributing to the decline of pubs. Occasionally, Publicans reported giving customers rides in their personal cars after pub nights. Some even picked customers up from their homes before a night out, particularly on weekends.

6.2 Publicans and Local Communities

The primary consequence of rising costs and decreased custom was a decline in employment opportunities within pubs. According to Publicans interviewed, there was generally no difficulty in finding a workforce, but many struggled to maintain their staff, especially during week nights, with more staff employed during weekends or for one-off events.

Many interviewees reported recent challenges hiring skilled local workers, especially in urban and suburban areas. These difficulties largely stemmed from challenges in hiring suitable staff, as some Publicans struggled to employ young workers due to their attitudes and limited adaptability to hospitality’s varied demands.

“I think finding the right staff is the hardest thing. Why? Because a lot of people judge and say ‘Oh, you just work in a pub’. To me, it’s not just a pub, it’s a community base. It’s our community hub; it’s our safe space. It’s not just about the drinking and coming for something to eat.” [Publican 8, Urban]

“Since this is a job that requires interacting with others, it doesn’t work out if someone can’t communicate well.” [Publican 2, Urban]

“Long hours and low wages - that’s just not how people should be employed these days. The outdated ways of hospitality need to be left behind. Our industry would be better off if more employers started taking care of their staff. Then, people might actually want to join our sector, rather than being expected to work five or six days a week, putting in 80 or 100 hours but only getting paid for 40.” [Publican 12, Suburban]

Publicans generally valued the contribution pubs provided in terms of workforce development in their responses. In the past, local teenagers used to get their first job at the pub, continuing to work during their college years. Typically, they started with very basic duties (e.g. cleaning tasks, collecting glasses) but their work responsibilities increased progressively with time. After a few years, Publicans could rely on a pool of skilled workers keen to work on a part-time basis and especially at weekends when they were needed most. However, and particularly in rural areas, opportunities are much reduced now, as higher costs and decreasing levels of custom generate less demand for the workforce in pubs and therefore fewer possibilities of skills transfer and training.

“I often have parents come in wanting their children to get their first job here. Because of that, I frequently hire young people and give them a shift each week so they can gain restaurant training and experience. People are always asking if their kids can work for me, and I’d like to help, but there’s only a limited number of shifts available for them. They can work behind the bar and do other tasks, but there’s only so much room.”
[Publican 10, Rural]

“I’ve had a lot of people work for me for quite a long period of time. And I don’t really struggle with getting people for a job. I sometimes struggle to get the right people for the job, but that’s probably because I’m a little bit picky in who I’m choosing”.
[Publican 1, Rural]

Responses emphasised the importance for Publicans to maintain their teams and retain their employees. Those who serve food tend to focus on delivering high-quality service to maintain their reputation. Similarly, for ‘wet pubs’, providing opportunities to young workers meant higher opportunities to train and retain staff over time.

“Giving opportunities, definitely, yes. We’ve gained value from it and so have they. It’s kind of a win-win situation. We don’t employ adults. We take them on when they’re 17, 18, and then they grow up with us, if that makes sense. So, I don’t have any people that I took on as adults.” [Publican 2, Urban]

“When we took this [pub] over, and we started, we decided that we would treat our staff as we wanted to be treated ourselves. 95% of our full-time staff are all on four-day weeks, so they get three days off a week. (...) They’re contracted 45 to 48 hours a week. If they do over their hours, they get paid for doing them.” [Publican #12, Suburban]

Moreover, responses confirmed the constant support provided by Publicans to a wide range of communal initiatives and events, corroborating information gathered from the focus groups and in-depth interviews. This support was given in the form of logistics. For example, the provision of physical space for initiatives and events to take place, or in the form of financial sponsorship, particularly regarding sports teams. The ways these things developed varied significantly across responses, but it seemed that local pubs were considered by residents as a first stop when seeking support. Publicans interviewed appeared eager to accept their roles as local facilitators and community supporters.

“I do an awful lot. I’ve got the bereavement group, and I also run a dementia group once a month where sufferers of dementia and their families they come in, I provide the teas and coffees and all that sort of stuff.” [Publican 8, Suburban]

“Mums get together and have a coffee. That’s just a free thing that I do. It’s nice because a couple of the mums were struggling with their mental health after having the kids. They arrived, formed connections, and have even created their own small groups. Now, they go on walks and engage in activities together. It’s been wonderful to witness these positive outcomes.” [Publican 1, Rural]

“People do see you as a pillar of the community, someone that they can come to. If there’s any issues, people tend to want to come and discuss them with you.”
[Publican 6, Suburban]

6.3 Inclusivity and Safety

Publicans also emphasised the relationships between their pubs and the different segments of customers visiting their premises. Responses gathered regarding their efforts towards customers' inclusivity largely resembled some of those collected from individual interviews with customers and during focus groups, regardless of whether the pub was located in urban, suburban, or rural areas.

“There’s a little old couple that live in the village. We started getting their shopping in Covid because they obviously couldn’t go. They were vulnerable, so they couldn’t go to the shop. So, we used to do some shopping on a Monday, Wednesday, Friday, and everybody could ring up in the village whoever wanted shopping doing.” [Publican 1, Rural]

“We operate as a rock pub, and many of our patrons do not align with mainstream societal norms. Our clientele includes a significant number of LGBT+ individuals, people on the autism spectrum, as well as middle-aged and older men, often characterised by biker jackets and long hair. This results in a highly diverse customer base; many of whom lack alternative venues they feel comfortable attending should this establishment close.” [Publican 2, Urban]

“We have our local community – there are quite a few regulars – but they still come to the pub because it’s their local spot and they appreciate what we’ve done with it. I told them it’s really all about hard work and making sure everyone who walks in gets treated the same way: same service and always greeted with a smile.” [Publican 7, Rural]

Of particular importance were the perception and care shown by interviewed Publicans towards vulnerable categories of customers who faced higher risks in terms of loneliness and depression. On the issue of older male loneliness, one Publican says:

“An older gentleman comes in on a Saturday. He doesn’t go anywhere else the rest of the week. He comes to our pub every single Saturday, and he comes to have his lunch and half a pint. Not a big spender, but I know he probably hasn’t had a conversation all week. I always make the effort, and I will go and sit with him for 15, 20 minutes and chat to him and ask him how he is and let him talk to me about his problems or whatever else. And he’s one example, there’s quite a few like that.” [Publican 7, Rural]

Finally, on the importance of inclusion and community building, another Publican states:

“I’d like to see us grow and bring more of the community into the pub, so people realise it’s not just about drinking – it’s about having a safe and welcoming space for everyone, no matter what you do. We have many gay and lesbian couples, multicultural families, single women and men, and even people who come in after a bereavement. I hope the village knows we can keep growing and that anyone will always be welcome here.” [Publican 8, Suburban]

7. Synthesis and Discussion – Phase I and Phase II

7.1 CEI Domains Reflected in Qualitative Experiences

The Community Engagement Index (CEI) is a four-domain, 21-component composite indicator created to measure the overall level of community engagement for each pub within the survey sample used in Phase I of the analysis. The CEI captures multiple dimensions of engagement, including the frequency of community events, charitable and volunteering activity, location partnerships, and the pub's contributions to inclusion, identity, and loneliness reduction.

Across interviews and focus groups, participants described social, emotional, cultural, and organisational processes that align closely with each of these CEI domains. Routine socialising, the pub's role in customers' weekly habits, multigenerational interaction involving not only family and relatives but also people from different generations within their community, and the importance of local events all mirror the CEI's community activities components. Charitable fundraising, staff volunteering, and in-kind support, often facilitated, if not directly led, by Publicans, are discussed frequently, reflecting the CEI's charitable and volunteering indicators. Partnerships with schools, clubs, and local organisations correspond to the CEI's measures of institutional engagement. Likewise, themes relating to belonging, safety, emotional support, cultural heritage, and a sense of identity strongly reinforce the CEI's attitudinal components relating to inclusion, identity, and loneliness reduction.

This strong alignment indicates that the CEI measured in Phase I corresponds closely to pub-level activities and social value processes described by customers and Publicans. The Phase II qualitative findings, therefore, provide interpretive support for the structure and use of the CEI, demonstrating that the index reflects the social value generated by pubs in practice.

7.2 Understanding the CEI-Revenue Relationship

Phase I identified a clear positive association between CEI scores and pub revenues. However, this relationship alone does not reveal whether community engagement drives commercial performance, whether financially stronger pubs can invest more in community engagement, or whether both causal pathways operate simultaneously. One important objective of Phase II was to examine this relationship qualitatively and identify plausible mechanisms linking engagement with business outcomes.

The qualitative findings suggest that, in most contexts, community engagement acts as a primary driver of business performance. Customers and Publicans consistently described how inclusive atmospheres, supportive Publican leadership, opportunities for routine socialising, and a wide array of community-focused practices created and fostered loyalty, trust, and emotional attachment. These attachments to the pub and its Publican translate into repeated visits, word-of-mouth recommendations, and predictable footfall. Importantly, these patterns of community engagement had to be frequent and seen as a fundamental characteristic of the pub for it to be seen most as a core community anchor.

Although some Publicans acknowledged that financial stability increases capacity for engagement, the dominant narrative in the data emphasised engagement as an investment rather than a consequence of financial success. Even pubs under pressure described relying on community involvement, events, and visible support to maintain trust, footfall, and local visibility within their communities. Many Publicans also framed engagement as part of their responsibility within the community, and customers of those same pubs explicitly identified Publicans' behaviour as a reason for choosing their pub over competitors. This finding was particularly strong in smaller towns and rural areas where community ties are stronger.

Taken together, the evidence indicates a predominant pathway explaining the CEI-Revenue link as being 1) engagement fostering social connection; 2) connection-building routine; and 3) routine supporting business resilience through loyalty, trust, and stable footfall. This relationship is illustrated by Figure 10: in other words, we find strong evidence that community engagement is not just associated with increased revenue, it is an important factor driving it. Table 9 summarises the mechanisms identified in Phase II that link community engagement with business performance.

Figure 10: Causal Pathway Linking CEI to Revenue

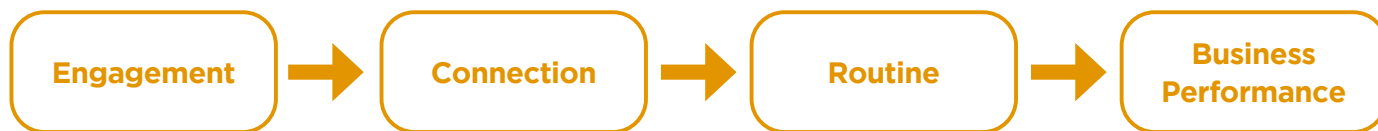


Table 9: Mechanisms Linking Community Engagement to Performance Outcomes

Stage 1: Engagement → Connection		
Mechanism	Description	Outcome
Belonging & Inclusion	Inclusive practices, individual recognition, fairness, and a sense of welcome foster emotional attachment.	Customers prefer venues where they feel valued increasing likelihood of return visits and long-term loyalty.
Publican Leadership	Publicans model civility, safety, attentiveness, and community stewardship.	Leadership builds trust and reputation, encouraging customers to choose the pub over alternatives.
Emotional Support	Supportive relationships, affection towards publican, neighbourliness, and informal care networks.	Strong interpersonal ties lead customers to support the pub, especially during difficult times.
Community Spirit & Shared Identity	Shared culture, pride, and identity formation around the pub.	Identity-based attachment becomes a powerful motivator for repeat footfall.
Stage 2: Connection → Routine		
Mechanism	Description	Outcome
Routine & Predictability	Weekly rhythms, events, and familiarity with people and space.	Routines stabilise footfall and create predictable demand patterns.
Reciprocity	Emotional or practical support builds a reciprocal sense of obligation.	Customers return consistently.
Intergenerational Continuity	Family traditions, multi-age groups, and continuity across life stages.	Diverse demographic reach and lifelong patronage expand the customer base.
Safety & Familiarity	Safe, well-managed environments preferred over unknown or unpredictable alternatives.	Encourages regular attendance, especially among groups who value safety (women, older adults, families).
Stage 3: Routine → Business Success		
Mechanism	Description	Outcome
Loyal Footfall	Routine-based visitation anchors reliable demand.	Reduces variability in trade and protects the business in low-demand periods.
Group-based Demand from Events & Partnerships	Sports teams, clubs, schools, charities, and community groups bring collective attendance.	External networks introduce recurring streams of customers and predictable revenue spikes.
Word-of-Mouth & Reputation Effects	Customers share positive experiences, trust, and community value.	Attracts new customers at low acquisition cost.
Embeddedness as Essential Local Infrastructure	The pub becomes a valued, irreplaceable community asset.	Increases resilience during economic shocks, as communities intentionally support the pub and the publican.

8. Overall Conclusions and Key Takeaways

This report has provided an assessment of the economic and social value generated by pubs within the Punch Pubs estate. Across the quantitative and qualitative analyses conducted for this report, a consistent conclusion emerges that well-run pubs serve as important economic anchors and vital pieces of social infrastructure that combat loneliness and strengthen the cohesion, wellbeing, and resilience of the communities they serve.

Takeaway: Pubs are Economic Anchors and Hubs of Local Opportunity

Pubs act as significant economic anchors within the communities they serve, generating a wide range of economic value. Each pub surveyed in this study supports approximately 10 jobs through direct employment and associated activity, contributes more than £500K in annual sales, and sustains local supply chains by spending an average of £24K per year with nearby suppliers ranging from food producers and entertainment providers to tradespeople. At the Punch Pubs portfolio level, these contributions scale to more than £1.16 billion in total annual economic impact when direct and indirect effects are considered.

These economic outcomes align closely with Theme 4 - Economy and Employment - from the qualitative analysis, which highlights how customers and Publicans perceive the pub as a site of local job creation and community-level economic activity. These views were particularly strong in less urbanised areas, where the local pub is seen as a vital component of the local economy.

Importantly, pubs also provide early employment opportunities for young people, offering pathways into work, skills development, and confidence-building. These roles help embed young workers within their communities and the local labour market. Taken together, these economic functions emphasise how pubs and Publicans contribute to local economies not only through direct spending and employment, but also by providing opportunities for skills development and experience for local, often younger, residents.

Takeaway: The Social Value of Pubs (Community Anchors, Belonging, and Meaning)

Across both phases of the research, it was evident that pubs generate extensive social value that extends well beyond their economic contributions. The thematic analysis highlights how pubs operate as Community Anchors (Theme 1), providing familiar, stable, and accessible spaces that help structure weekly routines and offer a sense of place within the community. Customers consistently describe their pub as a reliable point of connection, as somewhere they feel recognised, included, and welcomed, further reinforcing a sense of Belonging, Friendship and Wellbeing (Theme 2).

Pubs also function as hubs of Community Support and Local Contribution (Theme 3), hosting everything from social groups, hobby clubs, charity events, to major life events and informal gatherings. Pubs offer free or subsidised space for community initiatives, and they facilitate everyday networks of practical assistance, advice, and care. These forms of engagement reduce loneliness, build trust, and contribute to wider community cohesion in ways that existing formal institutions often cannot. These roles are particularly important for pubs operating in less urban areas.

The research also underscores the deeper emotional significance of pubs captured in Theme 5 of the qualitative analysis - Meaning, Memory and Continuity. Participants frequently described their pub as a place embedded with personal and collective histories, where friendships have formed, life events have been shared, and multigenerational relationships have developed over many years. In communities facing closures of other public or civic spaces, the pub often stands as one of the few remaining places where these types of memories can still be created, sustained, and passed on.

Pubs form an important part of local social infrastructure. They are not simply ‘places to drink’, but central community spaces that combat loneliness and support wellbeing, identity, continuity, and everyday social connection. Recognising these forms of social value is crucial for understanding the true contribution pubs make to the communities they serve.

Takeaway: Community Engagement Supports Business Resilience

The CEI, developed during the quantitative analysis phase, provides a structured measure of the social contributions made by pubs across the pub portfolio. The CEI provides a single, coherent measure of the overall intensity of community engagement undertaken by pubs, capturing a wide spectrum of activities, from regular social and cultural events to charitable initiatives and collaboration with local organisations. While engagement is consistently strong across rural, semi-urban and urban pub settings, the qualitative analysis revealed meaningful regional variation in the types of engagement taking place. These differences reflect local demographic, economic and contextual factors that shape how, and to what extent, pubs are able to engage with their communities.

The research found that community engagement is strongly linked with commercial performance. Pubs with higher CEI scores achieve significantly greater annual sales, and statistical modelling confirms a clear, positive association between engagement and turnover. The qualitative insights provide an explanation of this relationship. When pubs are active, visible, and socially embedded within their communities, they foster loyalty, encourage habitual and routine visits, and build strong local reputations. These mechanisms reflect Themes 1, 2 and 3, showing that community anchoring, belonging, friendship, wellbeing, and mutual assistance collectively translate into economic performance and business resilience.

Takeaway: The Essential Role of the Publican

Finally, our research clearly demonstrates that the role of the Publican is central to the economic and social value created by pubs. Publicans shape the atmosphere of their venues, lead community engagement, and set the tone for safety, inclusion and welcome. Their leadership is fundamental to Themes 1, 2 and 3 of the qualitative analysis: the pub as a community anchor, a site of belonging and wellbeing, and a hub of community support.

Customers frequently attribute their loyalty and sense of attachment to the ethos and approach of their Publican, whose presence can transform a pub’s identity and its position within the community. Continuity of Publican leadership is deeply valued, while times of high turnover are remembered negatively and associated with instability or decline. This dynamic is especially evident in less urban areas, where Publicans are often regarded as integral pillars in local community life.



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Appendix

A. Economic Multipliers

Table A1: Economic multipliers applied in the econometric analysis

Ignite Economics (2023, p. 19) using ONS Data:

“For every £1 that the UK hospitality industry directly contributes to GDP, it creates a further 58p indirectly, and a further £1.30 when including the induced impact. This means that the hospitality industry has a Type I (indirect) multiplier of 1.58, and a Type II (indirect and induced) multiplier of 2.30”

Type I Multiplier (including indirect effects only)		Type II Multiplier (including induced effects)
GVA (income) Multiplier	1.58	2.3

Ignite Economics (2023, p. 19) using ONS Data:

“For every 10 jobs that the UK hospitality industry creates directly, a further 4.7 are created elsewhere. This means that the hospitality industry has an employment multiplier of 1.47”

Type I FTE Employment Multiplier (including indirect effects only)		Type II FTE Multiplier (incl. induced effects also)
Employment	1.47	1.88

Multiplier Estimate Sources (Ignite Economics (2023) using ONS Data):

- Middle bound estimate = 1.58 for income and 1.47 for employment
- Upper bound estimate = 2.3 for income and 1.88 for employment
- Lower bound estimate... A conservative approach was taken by reducing the size of the reported Type I middle bound multiplier by a further 20%
 - Lower bound for income = $(1.58) - (0.58 \times 0.20) = 1.464$
 - Lower bound for employment = $(1.47) - (0.47 \times 0.20) = 1.376$



Griffin Inn
Mold

B. Interview/Focus Group Guides and Consent Forms

Figure B1: Participant Information Sheet

Participant Information Sheet (In-Depth Interviews and Focus Groups):

Evaluating the impact of pubs on local economies and communities

We would like to invite you to take part in our research project. The study aims to understand the economic and social impact of pubs on local communities in the United Kingdom.

Before you decide to take part, please read the following information carefully. It will give you a short overview of what this research project is, explains why we are doing this research, and what your participation would involve.

Who are we?

We are two researchers working at Northumbria University: Professor Ignazio Cabras and Dr Matthew Shannon. We are conducting a research study on the impact of pubs on local economies and communities in the UK. Our aim is to explore and analyse the impact these businesses have on their surrounding communities, economies, and supply chains, and how market changes and/or business challenges in the pub industry may affect them.

What does participation involve?

You will be invited to take part in either an interview or a focus group discussion with others. Each session will last around 20–45 minutes. With your permission, the session will be audio recorded so we can create accurate transcripts.

Who can take part?

Residents selected from communities served by Punch Pubs and willing to talk about their experiences.

What will we do with the information?

In-depth interviews and focus groups will be audio-recorded, transcribed and anonymised. The transcripts will only be read and used by us in the development of our research and will not be used for any other purpose. The transcripts might also be used to generate academic research studies to be published in scientific journals. You are welcome to see the outcomes of this research project.

Will everything you say to me be kept private?

All transcripts generated from focus group discussions will be encrypted so that they can only be accessed and used by us; their content will be kept private and confidential. Your personal details will not appear in any reports or publications.

Why are we doing this research?

This project aims at identifying and investigating the range of initiatives and activities that take place in pubs (e.g. charitable initiatives, volunteering, regular group meetings, sport and book clubs). We want to understand how pubs contribute to community life, health and wellbeing, and the local economy, to quantify how (and how much) pubs influence the quality of life within and across the communities they serve. Outcomes from this project will be of interest for a range of stakeholders operating in the pub industry and beyond. The evidence compiled by the project will help Punch Pubs & Co. to achieve industry recognition for helping drive more support and investment in pubs, promoting their business with both government and investors. Results from this project will also provide a useful instrument for practitioners and policymakers in view of designing and developing policies to better support pubs and companies operating in the sector, with the aim to preserve business and financial sustainability while preserving the positive social impact associated with pubs. Finally, publicans and the wider public will benefit from the increased awareness raised by the report in relation to the economic and social impact of pubs at a local level.

Who is the first point of contact in this project?

That would be me, Professor Ignazio Cabras, Head of the Department of Accounting and Financial Management at Northumbria University Newcastle. My research focuses on and the impact businesses operating in the beer and pub industry have within economies and communities at national, regional, and local level. My research team and I published several studies already investigating multiple themes and aspects affecting the industry; you can find more about myself by visiting my webpage.

If you wish to discuss this initiative in more details, please do not hesitate to contact me via email: ignazio.cabras@northumbria.ac.uk.

Your participation to this project is highly valued and appreciated, and will help us to design instruments for researchers, practitioners and policymakers which could help and support UK pubs facing challenging times ahead.

Figure B2.1: Participant Information Sheet (Page 1 of 2)


 Northumbria University NEWCASTLE		
Punch Pubs Project - Consent form		
Name of Researchers: Professor Ignazio Cabras - <i>Northumbria University & ESSCA School of Management</i> Dr Matthew Shannon - <i>Northumbria University</i>		
		<i>Please initial box:</i>
I confirm that I have understood the above research project, and I have had the opportunity to ask questions about the project.		
I understand that my participation is voluntary and that I am free to withdraw at any point without giving a reason. In addition, should I not wish to answer any particular question or questions, I am free to decline.		
I give permission for members of the research team to have access to my anonymised responses. I understand that my name will not be linked with the research materials, and I will not be identified or identifiable in the report or reports that result from the research.		
I understand that my words may be quoted in publications, reports, web pages and other research outputs but that these quotations will not include any information that could identify me.		
I agree to take part in the above research project		
Name of participant: _____ Date: _____ Signature: _____		
Name of researcher: _____ Date: _____ Signature: _____		

Figure B2.2: Participant Information Sheet (Page 2 of 2)

Consent to Participate to an Interview or Focus Group

You have been asked to take part to an interview of focus group organised by Professor Ignazio Cabras and Dr Matthew Shannon from Newcastle Business School, Northumbria University Newcastle.

The purpose of these interviews and/or focus groups is to explore and examine the role and impact of pubs in local communities across the UK. We are interested in people's experiences and perceptions of pubs, and the findings may also help inform guidance for practitioners and policymakers on how to better support pubs and the communities they serve.

Your participation is entirely voluntary. You may choose not to take part, and you can stop at any time without giving a reason. Your contributions will be audio recorded so that we can produce an accurate transcript. Your responses will remain anonymous, and no names will be mentioned in any reports or publications.

There are no right or wrong answers to interview or focus group questions. We are keen to hear a range of different views and encourage everyone to contribute honestly, even if opinions differ. In focus groups, we ask that only one person speaks at a time and that all participants respect the confidentiality of what is shared.

At the end of the form, we invite you to provide some basic information about yourself. This helps us to better understand the range of views represented. Once more, you can decide whether to disclose this information or not.

I understand this information and agree to participate fully under the conditions stated above:

Name: _____

Pub event: _____

Signed: _____

Date: _____

Please circle/tick:

Gender: Male Female

Resident in the neighbourhood/area/village since: _____

Age Band: 18-25 26-35 36-45 46-55 56-65 >65

Current marital Status: Married/Civil Partnership Separated/Divorced
Widow/Widower Single Other

Employment Status: Employed Full-Time Employed Part Time
Currently Unemployed Retired Other

C. Full Report Findings

1. This report illustrates the research findings on the impact of Punch Pubs in creating economic value and social wellbeing in the local communities they serve. Using surveys, focus groups, and interviews, the study assesses the effects pubs have on local supply chains and employment, as well as on community wellbeing and social engagement.
2. Pubs are vital to cultivating social connections among residents and strengthening community cohesion and unity, which increases when individuals actively contribute to the overall wellbeing of their community. In this process, pubs play a significant role by fostering relationships and, directly or indirectly, enhancing the provision of social capital within local communities and economies.
3. This study was developed in two sequential phases: Phase I and Phase II. Phase I aimed at quantifying the impact of pubs on local economies and communities. Findings from Phase I formed the basis for the analysis developed in Phase II, which examined the lived experiences, perceptions, and individual practices that underpin the economic and social value generated by pubs.
4. Data collected during Phase I was gathered from three sources: survey responses collected from Publicans¹ within the Punch Pubs estate; internal company financial data; and data from national providers such as the Office for National Statistics (ONS).
5. Using a database provided by Punch Pubs, which contains data on 1,264 pubs nationwide, the researchers gathered a final sample of 207 participant responses for analysis. The survey was distributed to the entire estate. The final sample reflects a broad cross-section of pub types, locations and operating models.
6. Surveyed pubs directly supported just over 10 employees on average, comprising over five full-time and nearly five part-time positions, frequently employing seasonal staff, with an average of around 1.5 seasonal positions reported per year. The average annual sales per pub were approximately £580K, underscoring the economic scale at which these establishments operate.
7. Beyond employment, each surveyed pub spent approximately £468 per week with local suppliers and businesses, with most of the local expenditure going into entertainment (£155 per week) and butchers (£94 per week). Pubs' procurement extended across a wide variety of other suppliers (e.g. bakers, grocers, florists), showing the value of pubs' custom for a wide variety of local trades and services.
8. Publicans across the estate also made a substantial and sustained contribution to local charitable and community initiatives. On average, each surveyed pub supported more than three charities per year and contributed approximately 23 hours annually of staff time to these initiatives. When considering staff volunteering, this figure rises to an average of 45 hours per year.
9. Estimated in-kind charitable donations calculated on a yearly basis revealed that each surveyed pub contributed an average of over £1,000 in providing the use of its space for community activities, alongside nearly £850 in sponsorships and donated goods, and over £500 per year in advertising support. In total, these in-kind contributions are estimated to exceed £3,200 per pub per year.
10. Likewise, the average estimated value of staff time contributed by volunteering was £549 per surveyed pub per year. For pubs with higher levels of engagement (more than 75 hours of staff volunteering annually), this contribution was at least £916 per pub. These estimates underscore the significant social value generated by voluntary activities that extend beyond the direct economic functions of surveyed pubs.

11. Survey data was compared against data provided by Punch Pubs to calculate a total multiplier effect associated with the pubs' business operations, and to quantify how direct spending generates additional rounds of economic or social activity. The total multiplier effect comprises three components: direct, indirect, and induced effects, with combinations of the three effects providing lower/middle estimates and upper estimates.
12. The multiplier effect applied to total annual economic contributions made by surveyed pubs associated with wages alone indicates an overall economic impact of £238k within the wider economy. Each pub directly supports seven FTE employees, rising to 10 FTE jobs within the wider economy when including estimates related to employment Type I multiplier effects.
13. When considering local procurement, each surveyed pub is estimated to spend an average of £24k on local suppliers, contributing nearly £38k to the wider economy when considering multiplier effects. Considering the overall impact of procurement, each surveyed pub spends approximately £116k per year, and £183k to the economy when considering multiplier effects.
14. Using projections based on survey data and internal records, the total wage contribution of the Punch Pubs estate was estimated at £300 million per year. The Punch Pubs estate also contributed £49 million to the local economy. In terms of procurement impact, Punch Pubs allocates approximately £146 million annually, rising to £231 million when factoring in expenditure within the broader economy.
15. The analysis indicates that pubs across the Punch estate directly support about 8,900 FTE positions. The total employment contribution to the wider economy rises to 13,000 when applying Type I multiplier effects. The estimated contribution to total economic output across the Punch Pubs estate was £1.16 billion per year.
16. Researchers developed the Community Engagement Index (CEI) to quantify and assess the degree to which the Punch Pubs' estate contributes to their local communities to generate social value. The CEI measures various aspects of engagement, encompassing the organisation of community events, participation in charitable activities, collaboration with local entities, and enhancement of community identity, heritage, and social fabric.
17. The CEI is a composite measure based on 21 components modelled from responses gathered from the survey and captures multiple aspects of community and social engagement. This tool helps compare community engagement levels throughout the pub estate, where community engagement means actively taking part in the social, cultural, and communal activities of a particular area.
18. To provide further detail on the ways pubs support their communities, the CEI was decomposed into four domains: *Community Activities*, *Charitable and Voluntary Contributions*, *Engagement with Local Institutions*, and *Community Identity*. The CEI component scores were rescaled between 0 and 1 for each domain to enable consistent comparison across domains.
19. CEI scores confirmed that pubs contribute meaningfully to social value creation across all domains, with particularly high scores for Community Identity, corroborating the view that pubs play a central role in fostering belonging and connection within their communities.
20. The analysis revealed a positive association between higher CEI scores and predicted annual sales performance. Pubs with lower CEI scores (e.g. 0.05) displayed average predicted sales of around £550K per year, while those with higher levels of engagement (e.g. 0.75) were associated with predicted sales approaching £700K. According to findings, stronger community engagement is linked to better commercial outcomes.
21. Overall, the results from Phase I support the argument that community engagement is not only socially valuable but can also be economically beneficial for pubs, reinforcing the importance of Publicans fostering strong local ties through inclusive community engagement. Pubs investing more time and energy into their local communities tend to achieve stronger sales outcomes.

22. The data collection for Phase II involved a total of 81 individuals and comprised four focus groups and 31 semi-structured interviews with customers, and a further 12 semi-structured interviews with Publicans. Interviews and focus groups were delivered in different locations, and efforts were made to ensure good representation across various age groups and backgrounds.
23. Recordings and transcripts from interviews and focus groups were coded to capture recurring ideas, common phrases, experiences, and other meaningful features across the dataset. Open coding was conducted iteratively, allowing multiple possible interpretations to be recorded during the early stages of the analysis.
24. Coding was used to develop a thematic analysis, which resulted in five overarching themes: *The Pub as a Community Anchor; Belonging, Friendship, and Wellbeing; Community Support and Local Contribution; Economy and Employment; Meaning, Memory, and Continuity*. Each theme reflected a distinct way customers understood the role and value of their local pub, providing a broader narrative structure of how pubs generate economic and social value.
25. Customers consistently described their pub as a steady, familiar place that punctuates their lives and gives shape to their weekly routines. These routines were rarely framed as simply 'going for a drink'. Instead, participants explained that the pub provides structure, purpose, and a reliable reason to leave the house.
26. Geography played a role in how this anchoring effect was experienced. For customers living in rural areas, the lack of alternative venues increased the centrality of pubs compared to urban and semi-urban areas, although customers living in these areas still identified their pub as a unique part of their routine.
27. A strong sense of belonging associated with their pub transpires from customers' responses, often seen as a second home or an extended family. For many, the relationships formed in the pub directly supported their wellbeing, with Publicans playing a central role in bringing these activities to life. The pub was often 'the' place where people share information, resources, and practical support at a local level; these layers of support created a strong sense of collective responsibility.
28. The pub was frequently referred to as an important part of the local economy, giving jobs for local people, particularly for young people taking on their first ever role in the workplace. Customers recognised that pubs contribute economically beyond direct employment, for instance, with their procurement from nearby suppliers, attract visitors into the area, and help sustain neighbouring businesses.
29. Participants often linked economic issues to fears of closure. Some described the loss of other pubs or community spaces in the area and stressed that losing this pub would have social as well as economic consequences, not only for staff, but for the rhythms of everyday community life. These feelings are strongest in rural areas.
30. Responses frequently described the pub as a backdrop to important life events, including the place where birthdays, anniversaries, retirements, sports tournaments, and family milestones are celebrated, or even more difficult moments, such as during bereavements and post-funeral meeting spaces. Several of the pubs studied had histories of frequent managerial changes in quick succession, and customers praised the efforts made by Publicans in running their businesses, despite the several challenges they faced at the current time.
31. Publicans interviewed indicated several changes occurring in the business since the Covid outbreak, with the cost-of-living crisis and recent changes in employer's employment contributions providing further challenges in terms of business costs and overheads. Many reported that levels of custom were much higher in the past, when most of the customers regularly visited their pubs during the week as well as the weekend with no significant changes on a weekly basis. The situation today has changed substantially, with customers visiting pubs less frequently and sometimes saving their visits for the weekend.

32. Publicans operating in rural and peripheral areas were particularly suffering due to limited transportation networks and inadequate infrastructure, combined with drink-driving regulations alongside the proliferation of off-licence sales, recognised as primary factors contributing to the decline of pubs. Occasionally, Publicans reported giving customers rides in their personal cars before and after pub nights, particularly on weekends.
33. In the past, local teenagers used to get their first job at the pub, continuing to work during their college years, their work responsibilities increasing progressively with time. After a few years, Publicans could rely on a pool of skilled workers keen to work when they were needed most. However, such employment opportunities were much rarer now, with fewer possibilities of skills transfer and training.
34. Publicans also emphasised the relationships between their pubs and the different segments of customers visiting their premises. Responses showed their efforts towards customers' inclusivity and largely resembled some of those collected from customers during interviews and focus groups, regardless of whether the pub was located in urban, suburban, or rural areas.
35. Overall, the qualitative findings from Phase II support those gathered from Phase I. Pubs analysed in this study act as significant economic anchors within the communities they serve, generating a wide range of economic value that goes far beyond their business contribution. The study demonstrates that the level of community engagement fostered by pubs is strongly linked with their commercial performance, highlighting the role of the Publican as central to the economic and social value created by pubs.



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