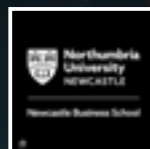

The Public's House

The True Economic & Social Value of Pubs



In partnership with

PUNCH
PUBS & CQ



April 2026

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AN

INTRODUCTION



Pubs provide far more than the wonderful drinks and meals that they serve. They enhance our lives, create connection, and provide respite from work pressures and the growing epidemic of loneliness and social isolation.

They are the invisible glue that holds our communities together. The vital community spaces where people meet to enjoy entertainment, live sport, the simple yet increasingly rarefied pleasure of face-to-face conversation, and so much more.

Although many of us instinctively understand the importance of pubs to society, we felt the time was right to support this belief with clear, quantifiable research that highlights the essential role the British Pub continues to play in inspiring those moments.

We partnered with Northumbria University Newcastle, and the result of their research is emphatic. Not only do pubs do magnificent work and are truly valued

by their communities but the ones that are most engaged return better figures, as shown by the development of the Community Engagement Index (CEI) in this project.

As part of our research we talked, not just to Publicans¹ about the valuable work they do, but pub guests too. We uncovered some heartwarming and uplifting stories that illustrate just how much a village or high street pub means to people.

Pubs contribute much to the fabric of the UK. They provide employment opportunities,

support supply chains, and drive investment. Our sector has proven itself repeatedly as a powerful engine for growth and innovation, so when a pub closes its doors, it's not just the immediate community that feels that loss, the ripple is felt through the whole British economy.

We're very proud of the work that our Publicans do and through this report have confirmed that operating a pub that actively engages with its community provides significant economic and social advantages for guests, the business itself, and the country as a whole.

Cheers to pubs; it's not only what they do, but how they do it that matters.

Andy

Andy Spencer

Chief Executive Officer,
Punch Pubs & Co

Jubilee House, Second Avenue, Burton upon Trent, Staffordshire, DE14 2WF

www.punchpubs.com

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

EXECUTIVE SUMMARY

Punch Pubs & Co, one of the largest pub companies in the UK with around 1,250 pubs, partnered with Northumbria University Newcastle to research and 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.

Pubs across the Punch 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. Supporting the community-focused roles of pubs not only enriches local life but also helps ensure the business remains strong over time.



Chris Welham



We really welcome this research from Punch Pubs & Co, which begins to quantify something those in the licensed trade have long understood, that pubs are one of the great social institutions of British life.

At their best, pubs are places of belonging. They bring people together, strengthen local economies, and create environments where friendships form and communities thrive.

Through our work at the Licensed Trade Charity, we see this impact every day. Publicans and pub teams are often the quiet custodians of community wellbeing, offering not just outstanding hospitality, but connection, conversation and support.

In an era when loneliness and social isolation are growing challenges, the role of the pub as a welcoming, inclusive community space has never been more important.

Chris Welham
Chief Executive Officer at the
Licensed Trade Charity



METHODOLOGY

Research was conducted late 2025 by Professor Ignazio Cabras and Dr Matthew Shannon.

The research team used surveys, focus groups and interviews to assess the effect pubs have on local supply chains and employment as well as community wellbeing and social engagement.

In Phase One, data was collected from three sources:

- Publicans within the Punch Pubs & Co estate.
- Internal company financial data.
- External data from providers such as the Office for National Statistics.

In total, 207 Publicans completed the surveys, 110 from the Leased & Tenanted estate and 97 from the Management Partnerships portfolio.

The qualitative research in Phase Two delved deeper with a series of semi-structured interviews and focus groups with Publicans and guests, examining the economic and social value created by organisational, individual, and collective community perspectives².

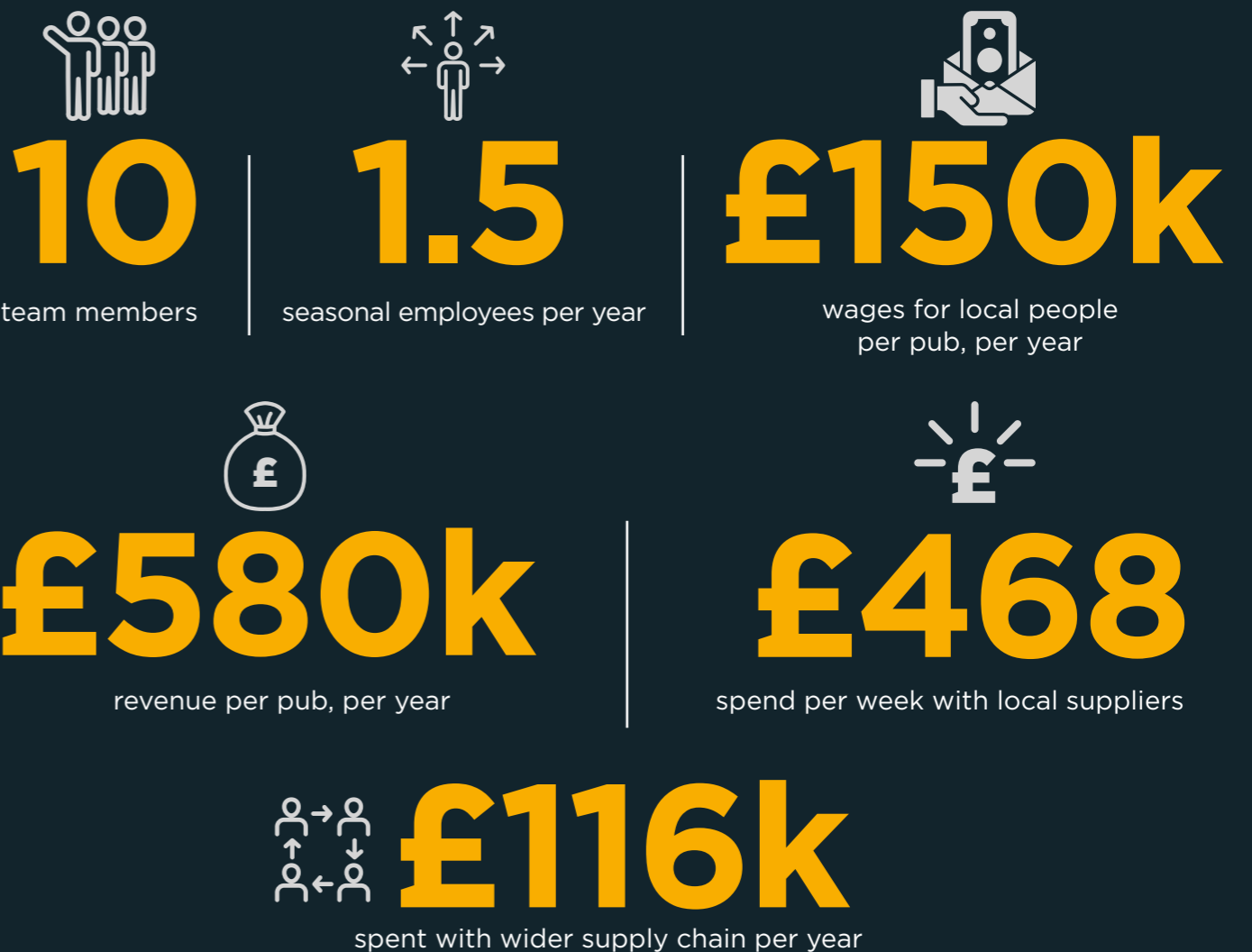


² Cumulatively, these data sources in Phase Two collected information from 81 individuals (12 Publicans and 69 guests) providing a comprehensive and robust platform for the analysis.

THE ECONOMIC IMPACT OF PUBS

Pubs benefit the economy directly in multiple ways including sales, tax contributions, team recruitment, and by supporting a broad range of local suppliers and businesses. They are an essential component of local economic systems, driving employment, supplier activity, and local spending.

Every Punch pub has a direct economic impact:



On average, a Punch pub directly employs 10 team members – five full-time and five part-time, with an average of 1.5 seasonal positions per year. It is important to note that these figures do not account for employment generated by Punch Pubs’ Support Centre. In terms of turnover, a Punch pub reports actual average annual sales per site of £580,000.

Significantly, pubs also sustain extensive local supply chains. On average our research shows that Punch pubs spend £468 per week with local suppliers, with the largest beneficiaries being the entertainment sector (£155) and butchers (£94). Other industries that rely on pub spend include bakers, grocers and florists.

LOCAL VALUE IN MOTION

When a Punch pub spends money, it doesn't just stop there. Thanks to what's known as the 'multiplier effect', every pound stretches further - supporting wages, boosting local suppliers, and circulating through the community to create even more economic and social value.

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, pubs paid to team members).

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.

Estimates of the Total Economic Contributions per pub, per year (sample)

	Direct Impact Per Year	Annual Total Economic Contribution (number of sample: 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>(Punch Pubs Revenue Data)</i>	£580,316	£849,583	£916,899	£1,334,727
Total Supplier Spend <i>(Punch Pubs Revenue Data)</i>	£116,063	£169,916	£183,380	£266,945
Number of People Employed (Full-Time) <i>(Survey Estimate)</i>	7.04	9.69	10.35	13.24

Using the Type 1 (middle) multiplier, our data shows the Total Economic Contribution per Punch pub is:

£238k wages:

creates a total economic impact of £238,000 in wages per pub each year.

£38k spend with local suppliers:

a spend of around £24,000 a year with local suppliers, per pub, increases to £38,000 of benefit to the wider economy once multiplier effects are included.

£183k procurement:

each pub spends about £116,000 on goods and services each year, increasing to £183,000 of economic benefit when multiplier effects are included.

With around 1,250 pubs in the Punch Estate, the Annual Economic Contribution of the Estate to the UK economy and communities is significant.

Using the Type 1 (middle) multiplier, we estimate:



13,000



£49m

roles supported by Punch Pubs; 8.9k full time equivalent (FTE) positions, rising to 13k when contributions to the wider economy are considered

contributed to the local economy by the Punch Pubs estate



£300m



£231m

total wage contribution

supplier spend in the wider UK Economy



£1.69bn

the estimated total economic output across the entire Punch Pubs estate is between £1.16 - £1.69 billion per year

Estimates of the Total Economic Contributions per year (population)

	Direct Impact Per Year	Total Economic Contribution (All pubs - 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>(Punch Pubs Revenue Data)</i>	£733,519,424	£1,073,872,912	£1,158,960,336	£1,687,094,928
Total Supplier Spend <i>(Punch Pubs Revenue Data)</i>	£146,703,632	£214,773,824	£231,792,320	£337,418,480
Number of People Employed (Full-Time) <i>(Survey Estimate)</i>	8,899	12,248	13,082	16,735

For every **£1** that the UK hospitality industry directly contributes to Gross Domestic Product (GDP), it creates a further **58p** indirectly, and a further **£1.30** when including the induced impact. This means that the UK hospitality industry generates:

- **£1.58 Type I** (direct and indirect) multiplier for every pound spent
- **£2.40 Type II** (direct, indirect and induced) multiplier for every pound spent

Ignite Economics, 2023

THE COMMUNITY IMPACT OF PUBS

The role that pubs play in their local communities extends far beyond the economic impact. Pubs raise millions every year for good causes, provide spaces to bring people together for clubs and conversation, and help to combat the global health concerns around loneliness and social isolation. They are a vital community resource that are at the heart of communities across the country.

“People support people here... If you shut these institutions down, then something will be lost.”

Survey participant

Every Punch pub delivers social value. Our Community Engagement Index (CEI)³ estimates the value per Punch pub:



³The methodology for the Community Engagement Index is explained on pg 15

CASE STUDY

James Wilson - Pheasant Inn, St. Newlyn East, Newquay

I'm reminded every day that we're far more than a pub. We're a genuine community anchor – the place which the people of St Newlyn East rely on for routine, familiarity, and connection.

In addition to being the place to meet, we play a significant practical and financial role in the life of the village, employing 14 people, the majority of which are full-time and most of whom live and want to work locally.

Keeping money circulating in the local economy is important to us, so our flour is sourced from a nearby mill, a substantial amount of meat is purchased from the village butcher and our fruit and vegetables from Aral Farm, a community market garden.

Friendship, belonging, and wellbeing are in everything we do, especially as there's no sports clubhouse or dedicated event venue, so we often step in to facilitate activities and gatherings. We run initiatives like warm space coffee mornings, a book club, and even deliver Christmas dinners to people who can't leave their homes. We've built a strong group of regulars who drop in around 4pm every day just to see who's



here and catch up. These small gestures nurture something powerful: a sense of being seen, supported, and part of something bigger.

And then there are the memories. Birthdays, anniversaries, quiet moments, and big milestones - life unfolds within our walls. One of our most treasured pieces of history is the wooden door set with 39 studs, each one representing a life lost in the East Wheal

Rose mine disaster in 1846. Every year, people from all walks of life gather here to remember, reflect, and honour the stories of our community.

I feel a genuine privilege in being a custodian of this pub. The Pheasant holds the shared history of our community - its joy, its sorrow, its everyday rhythms. It's a space where everyone is truly welcome, and where the spirit of our village lives.



James Wilson,
The Pheasant Inn

CASE STUDY

Craig Pennington - Lord Roberts, Nottingham

People often tell me how much they love what we've done with the Lord Roberts since we took on the venue in 2019.

I always say that nothing we've done has felt forced, it's all come naturally. For me, hospitality is about people and genuine customer service. When guests walk through the door, it feels like I am welcoming them into my home. Creating that feeling starts with having the right team around you, a team that helps build a safe space where people can be exactly who they want to be.

I'd describe both our team and our customers as a group of likeminded people who don't care how you identify, whether you're young, older, a student, gay, trans, or anything else. We don't brand ourselves as a gay bar, we're a safe space, a traditional pub where everyone is welcomed like family.

One of our former Assistant Managers once told me that the pub genuinely feels like a family. That means a lot to me, because anyone in hospitality knows we often see our team more than our own relatives. One of our team members has been with us for 20 years now.



Craig Pennington, The Lord Roberts



We've hosted two same-sex wedding receptions at the pub, and those moments really stand out. It makes me proud that people choose the Lord Roberts to celebrate such important milestones. The pub has become one of the city's most welcoming and attractive spaces for people to come together.

Two years ago, a group of boys approached us about starting an LGBTQ+ running group and asked if they could use the pub for their post run social. The first run had 30 people; now 80-100 join each time, which is incredible. We offer a bag drop and 10% off drinks, supporting local activities like this is really important to us.

We also sponsor the Nottingham Lions FC and the Nottinghamshire Hurricanes RFC, both inclusive teams that provide safe spaces for

LGBTQ+ individuals, which aligns perfectly with our culture. On the first Thursday of every month, we host the Gay City Bowlers, and we regularly welcome an LGBTQ+ badminton team. Every Wednesday we run a pub quiz, we also host a monthly book club and a monthly drag performance downstairs, the drag nights are always a sellout.

Across the country, the LGBTQ+ pub scene has shrunk, and that makes spaces like the Lord Roberts even more important. We're proud to offer a safe, welcoming place where people can meet, connect, and feel part of a community.

FUNDRAISING

Each pub in the Punch estate continuously does well, by doing good and supports an average of three charitable and community initiatives. Team members at each pub contribute a combined 45-75 hours in support of good causes, around half of which is voluntary.

As well as time, pubs also provide free space, goods and marketing for events. Each pub contributes more than £1,000 in providing use of its space, £850 in sponsorship and £500 in advertising support.

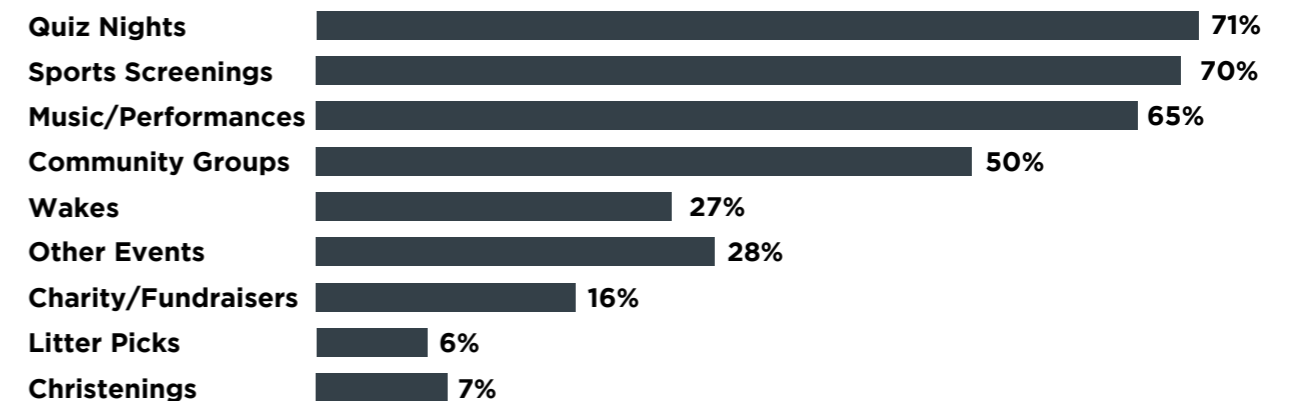
This all combines to supporting charitable and community causes to the tune of £3,200 per pub per year.



Three Crutches, Rochester

£549 is the average estimated value of team members' time contributed by volunteering per pub per year. For pubs with higher levels of engagement, this increased to **75 hours** with a contribution of at least **£916** per pub. The estimates highlight the significant social value generated by voluntary activities beyond the direct economic functions of a pub.

Community Engagement by Event Type (Social Value Survey)



Frequency of community events (at least one every month)

CASE

STUDY

Running this pub has never just been a job for me, it's about putting it right at the heart of the community.

Beth Robinson - Beeswing Inn, East Cowton, North Yorkshire

If something's happening locally, we want to be part of it. That might mean hosting gatherings for the church, working closely with the school, or setting up a simple cake and coffee morning so mums and their little ones have somewhere friendly to come and have a break.

With so many community spaces disappearing, pubs like ours have to step in. We open our doors because it isn't always about making money. It's about giving people a warm, welcoming place where they feel seen, and creating spaces for people to meet one another.

Consistency really matters. We open the same hours every day because people rely on that routine. Over time, you get to know what each regular needs, whether it's a quiet corner with their paper or someone to chat to at the bar. And if someone whose normally in doesn't appear, we check in. It's as simple as caring.

Supporting local people is a huge part of what we do. Most of our team live right here in the village, and we try to buy locally too, from the butcher down the road to the basket of eggs on the bar that people donate to and help themselves from. We run art classes, baking sessions, all with local suppliers.

To me, a pub is a home from home. It's a place where you'll always find someone to talk to, someone who cares. We want everyone who walks through the door to feel welcome, no matter who they are or where they're from. That's what a true community pub should be.



Beth Robinson, The Beeswing Inn



THE COMMUNITY

ENGAGEMENT INDEX

The researchers created a Community Engagement Index (CEI) because there isn't a standard way to measure the size and social value contribution from pubs to their communities. The CEI looks at four main areas:

- **How often pubs organise community events**
- **How involved they are in charitable activities**
- **How much they work with local groups and organisations**
- **How they help strengthen community identity and local heritage**

To measure this, researchers used 21 questions, each scored between 0 and 1.

The results show that pubs contribute meaningfully in all four areas - especially when it comes to identity and belonging, corroborating the view that pubs play a central role in fostering belonging and connection within their communities.

In addition, pubs with higher CEI scores also tend to perform better financially. At the average level of community engagement observed in the sample (CEI = 0.28), the model predicts annual sales of approximately £580,000. For example, pubs with low engagement (a score around 0.05) have predicted annual sales of about £550,000, while highly engaged pubs (a score around 0.75) have predicted sales closer to £700,000.

Overall, pubs with stronger Community Engagement not only support their neighbourhoods - they also perform better as businesses. They act as important social spaces where people feel welcome, connected, and supported, helping to strengthen local networks and community life.

Taken together, the evidence underscores the important role that pubs play in fostering social cohesion, combating loneliness - from offering a familiar face at the bar to hosting community groups - strengthening local networks, and sustaining the cultural fabric of the places they serve.

Causal Pathway Linking CEI to Revenue



“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.”

HOW PUBS CREATE SOCIAL VALUE

Guests see their pub as far more than somewhere to drink and eat. Respondents 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.

Analysis of the research identified five overarching themes that explain how guests experience the social and economic value of their local pub.

The Pub as a Community Anchor

Pubs serve as steady, familiar places that structure people's weekly routines and provide consistency in everyday life.

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



Belonging, Friendship and Wellbeing

Pubs foster deep social bonds and act as supportive environments where people feel recognised, welcome, and safe.

"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."
 Guest 6, Pub A

"We use [our 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."
 Guest 3, Pub C



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.

"Every Christmas, she (Publican) does about a hundred hampers for the local, poorer people... she puts in enormous amounts of money for it."
 Guest 1, Pub D

"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, Surburban

Economy and Employment

Pubs are recognised as contributors to the local economy, offering jobs, attracting visitors, and supporting other local businesses.

"They buy local produce from the shops... good connections with the local shops."
 Guest 1, Pub D

"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."
 Guest 3, Pub B

"I would not be able to have done college, or anything, if I didn't work in a pub."
 Guest, FG2 Pub F

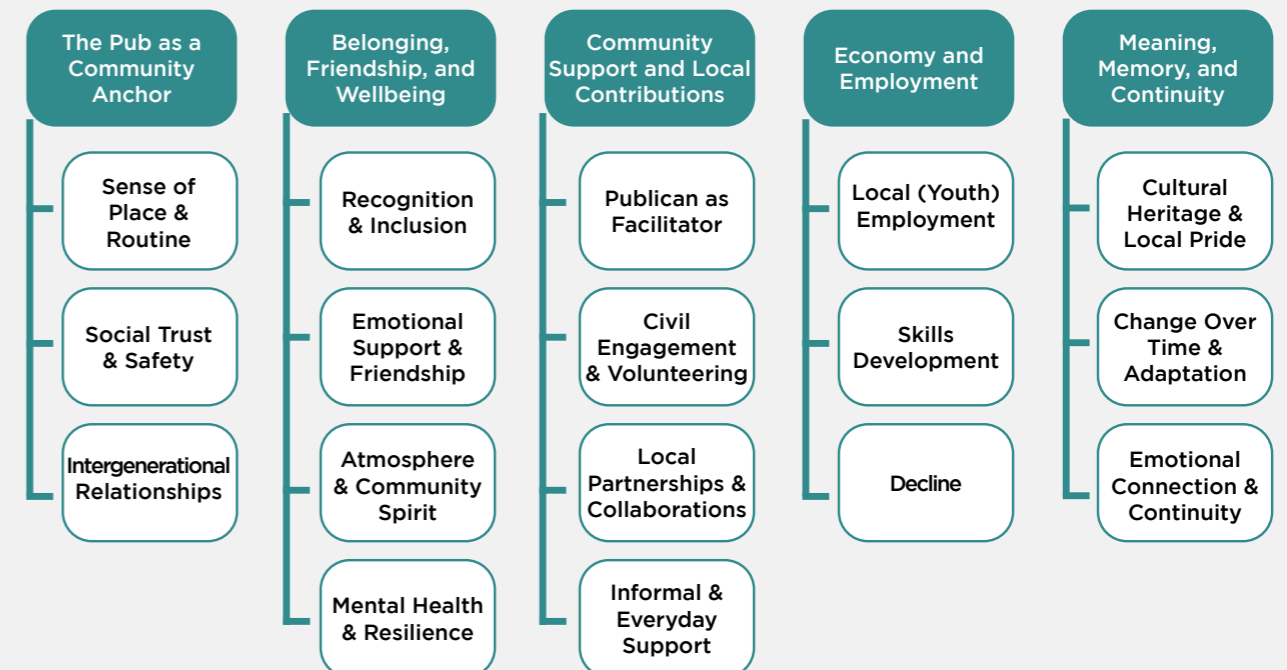
Meaning, Memory and Continuity

Pubs hold emotional and symbolic significance. They are spaces where important life events unfold, and where personal and community histories accumulate.

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



Overview of Themes and Sub-Themes from Guest Interviews



CASE STUDY

BELONGING, FRIENDSHIP & WELLBEING

Janet Clark - Top House, Liverpool

Everything we do involves the community, that's mainly why we operate. We have many regular and returning guests walking through our doors, it feels like a safe place for them - they invite their friends and family, and suddenly, you've got a full pub.

It's just nice to look across the bar and see everyone having a laugh and enjoying themselves, we see it all the time. We pride ourselves on creating a welcoming and warming atmosphere, and new guests always return.

We like to talk to our guests and get to know them on a personal level. It's so important, everyone is going through something and people come in needing a listening ear.

We host many community and charity-led events, from breakfast with Santa at Christmas, to our legendary Halloween party where everyone comes from all over Liverpool. In fact, every Wednesday we host a bingo event, when we started, we had about four or five people come along, but we kept it going, and now have 30+ people attending. We offer free tea and coffee, sandwiches, sausage rolls and biscuits to keep everyone fed and watered. It's about us giving back, and by doing that they return to us throughout the week.

We also host two darts teams each week and sponsor our local football club. We've done charity abseils to raise funds for cancer treatment in the past, as well as raffles behind the bar with money going to local charities.

You don't realise how much the pub can mean to our guests, if we were ever forced to close it would be absolutely devastating. When we took over this site six years ago it was a shell and we really built it up. It's the hub of the community. People say to us all the time, 'you've made this pub what it is now'. It would kill us if we had to close, it's not just a home, it's a livelihood, and we class the guests as our friends.



Janet Clark and Operations Manager Mark Cunningham

CASE STUDY

MEANING, MEMORY & CONTINUITY

Jason and Tiffany Mawle - The Butchers Arms, Bishops Itchington, Southam



Jason & Tiffany Mawle, The Butchers Arms

A pub is more than a place to eat or drink, every day we see how important it is for people. During the quieter hours, you notice the older regulars who are there because they don't have family nearby, or many people at home. They'll come in for one drink and just enjoy having someone to talk to. What matters to them is that the welcome is consistent, there's always a friendly face and someone who will listen without judgement.

When we first arrived, it was a very single demographic 'drinkers' pub, and families didn't always feel comfortable. We worked hard to change that. Now it's a space for everyone - from pumpkin picking events to free board game afternoons, mobility classes, a tea/coffee and chat by the fire, mum and baby groups, and holiday activities for kids.

Different ages come together here, our young bar team are close with older

regulars, and people make friendships you'd never expect.

We try to support the whole village, fundraising for the school, hosting charity darts nights, and offering part time work to young people and semiretired villagers alike. We also partner up with local suppliers; there's a brewery about five minutes up the road from us run by a guy who used to run one in New Zealand - it's amazing! We also allocate a space on our car park every Thursday to our local greengrocer to sell produce to Guests, in exchange for potatoes of course!

For many, the pub becomes an escape, a place that feels like family - they look forward to coming in. Some guests use the pub as a home away from home. If it weren't here, we'd worry about the people who rely on this place. It's more than our livelihood; it's a lifeline for the community.



PUBLICAN PERSPECTIVE

It is a testing period for many business owners across different industries. The pub sector, however, has proved time and time again that it's made of stern stuff and the resilience, creativity and flexibility that has seen it through tough times before, will do so again.

This is partly because of the unique position this sector occupies right at the beating heart of communities. Fundamental to this is the role of the Publican. Part confidante, part fixer, part therapist, part community leader and part entertainer (and that's just a small selection of the roles they play). They truly are the vibrant centre of the communities they support.

“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.”

Suburban Publican



RURAL ROLES

Pubs operating in rural areas are, arguably, even more vital to their communities than their suburban and urban counterparts. Many village pubs act as the local butcher, baker, post-office, and coffee shop, but there's also examples of pubs that operate as the only library, hairdresser, meals-on-wheels provider, and digital hub in their area.

“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... Now, they go on walks and engage in activities together. It's been wonderful to witness these positive outcomes.”

Rural Publican

EMPLOYMENT

Publicans are rightly proud of the contribution they make to workforce development. A great example of this is when teenagers start their first job, keep working through college, take on more responsibilities over time, and steadily build skills that help them in every area of life.

Beyond youth employment, there's also the part-time work Publicans offer those unable to commit to a 9-to-5, jobs for older workers looking for a way back into employment, and roles for the neurodiverse who need somewhere that suits their needs. Pubs offer all this and much more.



“I often have parents come into the pub 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.”

Rural Publican

“When we took this (pub) over, and we started, we decided that we would treat our team as we wanted to be treated ourselves. 95% of our full-time team are 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.”

Suburban Publican



INCLUSIVITY

Publicans also spoke about the role they play in supporting those at risk from loneliness and isolation and providing a safe space for people from various backgrounds. The Publican's responsibilities extend well beyond serving food and drinks, positioning them as an essential contributor to the social and cultural structure of communities nationwide.

“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.”

Suburban, Publican



“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.”

Rural, Publican

WHY PUBS MATTER



We've always known that pubs are so much more than a place to enjoy a drink and now this latest research from Punch and Northumbria University Newcastle provides that evidence.

This impressive report shines an important light on the vital role pubs continue to play in supporting local economies, strengthening social connection, and creating welcoming spaces for everyone.

At the British Institute of Innkeeping (BII), we see every day the dedication, resilience and passion of Publicans who go above and beyond. Whether it is hosting charity events, tackling loneliness by providing safe and inclusive spaces, supporting local suppliers, or offering vital employment and training opportunities, pubs consistently demonstrate their value as community anchors.



Steve with Publican Emma Gibbon at the Plough, Prestbury

This report makes clear that the contribution of pubs is beyond simply a small business or a place for food and drink. Up and down the country, people make friends, celebrate important life events, and look out for each other when things are hard. Our pubs build communities - and in an increasingly digital world, the human connection that pubs foster has never been more important.

However, sustaining their role in every community and their vital impact requires the right environment for pubs to thrive. Their contribution needs to be recognised through fair taxation, targeted investment and reduced regulation to ensure that pubs can keep delivering these social benefits for generations to come.

The BII is proud to champion the people behind our pubs, whose work continues to strengthen communities across the UK.

Steve Alton CBI

Chief Executive Officer, British Institute of Innkeeping

CASE STUDY

Lydia Washington - The Rocket, Rainhill

I've worked in pubs since I was 16, starting out glass collecting before moving onto the bar, up to bar management, and eventually taking on pubs of my own. People often assume Publicans are of an older generation, but with the industry opening doors for me far earlier than I ever expected and being able to show care and willingness, the opportunity came at me thick and fast, and I've loved every minute of it.

What I love most about hospitality is the energy young people bring. They're shaping the future of pubs by bringing new ideas, a fresher culture, and a different kind of connection with guests. When it comes to employability, hospitality teaches the skills that matter most, such as communication,

confidence, and genuinely caring about the people you serve. These are abilities you develop on the job, shift by shift, and they're what help young people grow, thrive, and truly make their mark in this industry.

I've always been passionate about hiring younger staff and helping them progress. With the right training, they're incredible, and they're the talent that will secure the future pipeline of our industry. If pubs are going to succeed and get back to where they were over the next decade, we really need them.



Lydia Washington, The Rocket, Rainhill

ECONOMY & EMPLOYMENT

IN CONCLUSION



This report provides an assessment of the economic and social value generated by pubs within the Punch Pubs estate. What emerges is clear: pubs are integral to British traditions and cultural heritage, generating extensive social value that extends well beyond their economic contributions.

This report makes it clear that pubs 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.

Importantly, pubs also provide significant local employment. From first jobs for young people that offer pathways into work, skills development, and confidence-building, to opportunities for employment to those often unable to work a traditional workday. These roles help embed workers within their communities and the local labour market.

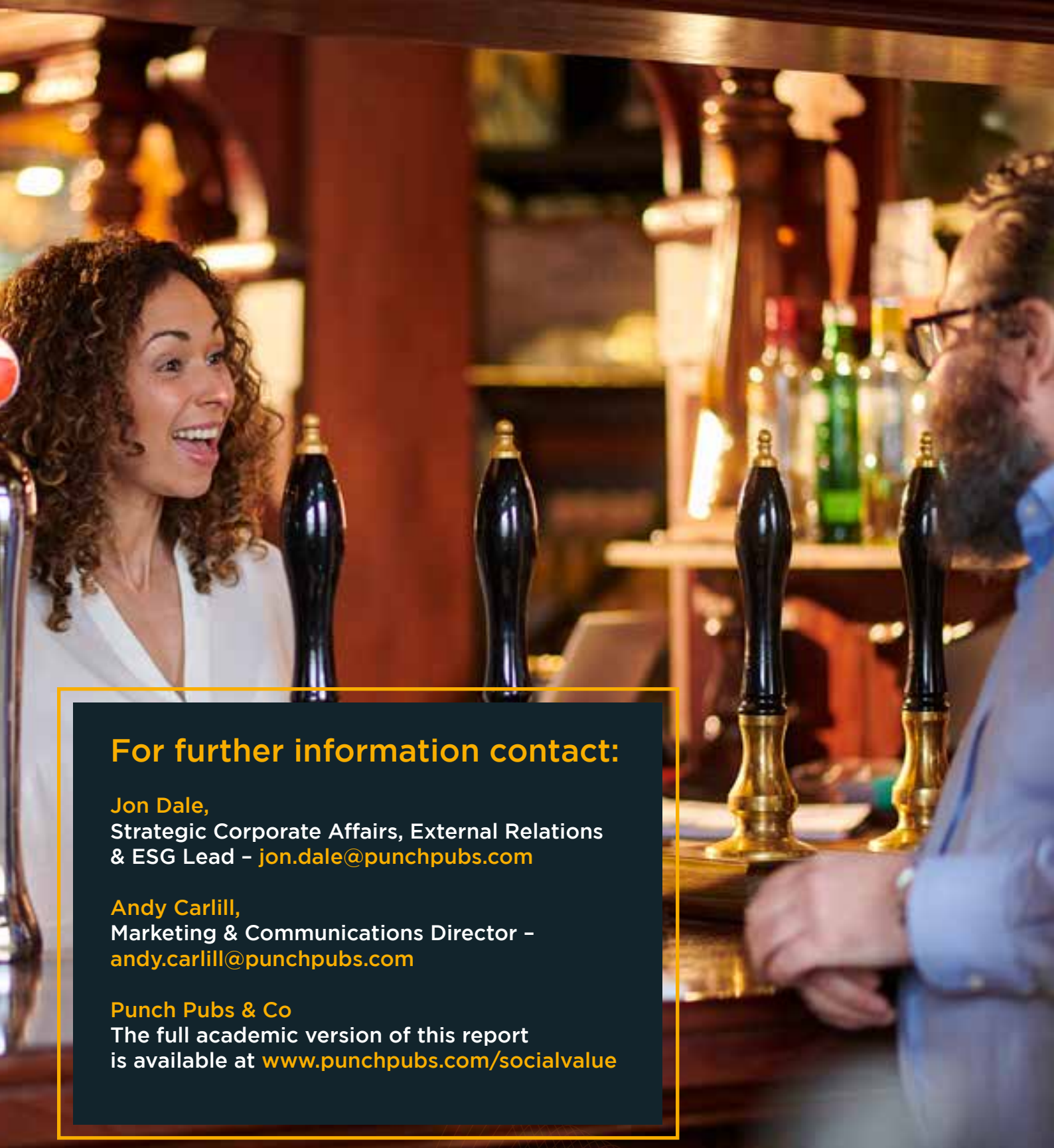
Significantly, the research found that community engagement is strongly linked with commercial performance. Sustained community engagement fosters deep guest loyalty by creating a sense of belonging, familiarity and trust, encouraging repeat visits, longer dwell time, word-of-mouth recommendation and emotional attachment to the pub.

Pubs with higher Community Engagement Index scores achieve significantly greater annual sales, and statistical modelling confirms a clear, positive association between engagement and turnover. This can be seen as something of a secret weapon for Publicans looking to build their businesses, increase profits and drive investment.

Our research also 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 the pub as a community anchor, a site of belonging and wellbeing, and a hub of community support.





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