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**Top 10 UK pub groups by outlets expected to see +7.0% growth in 2021**

According to the latest data from the Lumina Intelligence Operator Data Index, the top 10 pub groups by outlets are expected to see +7.0% growth with further consolidation in the pub market.

Of the top 10 pub groups, Stonegate is forecast to remain the largest estate by the end of 2021, with just over 4,700 pubs, 60% bigger than the second largest pub group, Star Pubs & Bars.

Admiral is forecast to see outlet growth of 71% (+674 outlets) by the end of 2021, following its acquisition of Hawthorn.

Despite pent-up consumer demand driving sales post-lockdown, overall turnover among the top 10 pub groups is expected to decline in FY2020/2021 – down -54% versus 2020. This follows a sharp decline between 2019 and 2020, with the overall 2021 forecast of £3bn turnover significantly lower than the £9bn turnover recorded in 2019.

Looking forward, the report indicates that the use of technology and delivery services remain key to sales.

According to the report, technological innovations remain vital to the pub sector, to improve the consumer experience, especially during ordering. The benefits of digital technology have shifted from minimising contact, to speed, convenience, and the ability to track orders in venues.

Greene King has reported app usage accounted for 70% of orders taken, and Mitchells & Butlers noted trends of higher spend per head, premiumisation, and trading up.

Commenting on the results, Senior Insight Manager at Lumina Intelligence, Katherine Prowse, said: *“The volatility of the market has allowed pub groups to review current strategies and restructure. Unsurprisingly, the impact of the pandemic saw the majority of the leading pub groups rationalise their estates. However, with merger and acquisition activity increasing, we expect many to grow their estates by the end of the year.”*

*“Despite pent up consumer demand driving sales post lockdown, turnover amongst the leading pub groups is not expected to recover to pre coronavirus levels by the end of the year. Delivery and tech will be key to driving future growth. Consumers want to continue the benefits that tech and delivery offers from a speed and convenience perspective.”*

Find out more about Lumina Intelligence’s Operator Data Index [here](https://www.lumina-intelligence.com/product/operator-data-index/).

**ENDS**

**Report methodology**

The Lumina Intelligence Operator Data Index is a tool that tracks the performance of hospitality operators, providing market rankings based on turnover and outlet numbers, segmented by sub-channels.

Our Operator Data Index includes:

* Comprehensive data on 700+ leading UK hospitality operators
* Access market rankings, sales and outlet counts and monthly analysis presentations.

**About Lumina Intelligence**

Lumina Intelligence inspires the global food and drink sector with deep, actionable insights powered by the world’s best analytics technology. Our products and services are used by the major brands and organisations in these fast moving and growing markets to support business planning, strategic marketing and new product development.

With offices in London, Chicago, Montpellier, and Singapore, and local on the ground analysts across our businesses, you can trust our market knowledge. We are committed to providing all our customers with up to date accurate information to support critical decision making.

Combining the expertise and experience of HIM, MCA Insight and Lumina Intelligence, we are the experts in market and consumer insight across the food & drink and nutrition markets.

<https://www.lumina-intelligence.com/>