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**Pubs regain share of dinner occasions and drive higher spend**

According to data from Lumina Intelligence’s Eating & Drinking Out Panel, in 12 weeks ending (12WE) 15/05/2022, pubs had a 13.9% share of total dinner occasions across the eating out market – up +1.3ppts vs. 12WE 20/02/2022.

In the same period, average spend at dinner per consumer was £21.60, and increase of +10% versus the previous period. Spend at dinner is up in the majority of channels, with restaurants seeing an increase of +3% in the latest quarter, however it is pubs that have seen the biggest increase.

These increases are partially driven by high inflation, but also a rise in consumers trading up on less frequent dinner occasions.

**Spirits drinkers purchase more and spend more**

On average, consumers purchase between 2-3 alcoholic drinks per eating out occasion, whether it is by itself or with food.

Spirits drinkers drink the most drinks per sitting – on average 2.55 drinks per occasion in the 12WE 15/05/2022. This is followed by 2.54 for beer drinkers and 1.97 for wine drinkers. Versus the previous 12 week period, this is a +4% increase for spirits, -1% decline for beer and -2% decline for wine.

On average, in the 12WE 15/05/2022, alcohol drinkers spend £10.98 on drinks per visit - -3.2% down on the previous 12 weeks (12WE 20/02/2022). When we analyse this by drink type, we see a decline across both beer and wine, but a +10.1% increase in spend from spirits drinkers:

|  |  |  |
| --- | --- | --- |
| **Drink type** | **Spend per visit** | **% change vs 12WE 20/02/2022** |
| Beer | £10.46 | -7.7ppts |
| Wine | £12.06 | -2.1ppts |
| Spirits | £16.71 | +10.1ppts |

These differences are being driven in part by the changes in number of drinks consumed, with consumers having slightly fewer beers and wines, but enjoying more spirits. Longer term spend increases will inevitably go up due to price inflation.

**Beer still drives the highest volume**

Using Lumina Intelligence’s Eating & Drinking Out Panel, we can see the share of occasions split by alcoholic drink type. Overlaid with Lumina Intelligence Menu Tracker data showing share of menu items split by drinks type, this highlights some interesting data:

|  |  |  |
| --- | --- | --- |
| **Drink type** | **Share of consumption occasions** | **Share of menu items** |
| Beer | 57% | 16% |
| Cider | 11% | 5% |
| Cocktail | 6% | 14% |
| Spirit | 10% | 40% |
| Wine | 16% | 25% |

Wine and spirits represent two thirds of operator drinks menus, but account for a quarter of consumption occasions. In contrast, beer and cider represent 21% of operator drinks menus and account for 68% of total consumption occasions.

Commenting on the findings, Insight Director at Lumina Intelligence, Blonnie Whist, said: *“Pubs are bouncing back, despite the challenges the sector is facing. Increased spend and regained dinner share are great signs that for high spend occasions which are a bit more special and discretionary, pubs and bars are going to win out. Spirits are becoming a key opportunity for operators to drive frequency and spend, however this cannot be at the expense of beer, which continues to drive the highest volume.”*

Find out more about Lumina Intelligence’s Menu Tracker [here](https://www.lumina-intelligence.com/product/menu-tracker/).

**ENDS**

**Menu Tracker**

Lumina Intelligence’s Menu Tracker enables you to track, compare & analyse the pricing & menu composition of 80 major UK pub, restaurant, QSR, sandwich and coffee shop operators. Updated monthly, the tool allows for in depth analysis of:

* Brand menus
* Menu price inflation
* Dietary requirements
* NPD
* Ingredients

**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/>