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2019 London pubs annual data note

Cultural Infrastructure Report
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Greater London Authority
City Hall
The Queen's Walk
More London
London SE1 2AA
www.london.gov.uk
enquiries 020 7983 4000
minicom 020 7983 4458
Copies of this report are available
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Summary

This note examines recent data on pubs in London in order to help inform policy on London's pubs. It builds on a previous GLA Economics [paper](#) on long run trends in London's pubs and a previous [audit](#) of pubs data.

Headline findings

- Between 2017 and 2018 there was no net loss of pubs in London, with a small net increase in inner London.
- The number of pubs in London was virtually unchanged between 2017 and 2018, with London seeing a net gain of 10 pubs (0.3 per cent). This follows a net loss of 85 pubs (2.4 per cent) between 2016 and 2017.
- There was a mixed picture between boroughs. While 11 boroughs saw a net increase in pubs, 13 saw a fall in pub numbers and 9 saw no change.
- There were small increases in the number of pubs both with fewer than 10 employees and pubs with 10 or more employees. Despite this, total employment in London's pubs was unchanged between 2017 and 2018.
- London is akin to other UK city regions in terms of trends in total pubs numbers. However, London is unusual in having more large pubs and more employment in pubs now than in 2001.
- A large proportion of jobs in London pubs continue to be paid below the London Living Wage. The share of jobs paid below the London Living Wage in pubs was higher than in the accommodation and food sector overall.

Data source and Definitions

The data used in this note comes from the Inter-Departmental Business Register (IDBR), a list of UK business compiled from administrative data sources. Businesses are classified by their main activity and according to the 2007 UK Standard Industrial Classification. As such, some pubs may not be registered as pubs (for example hotel bars). Furthermore, changes in pub numbers may reflect businesses changing their main activity. Due to this and sampling variability, caution should be taken not to over-interpret changes from one year to the next.

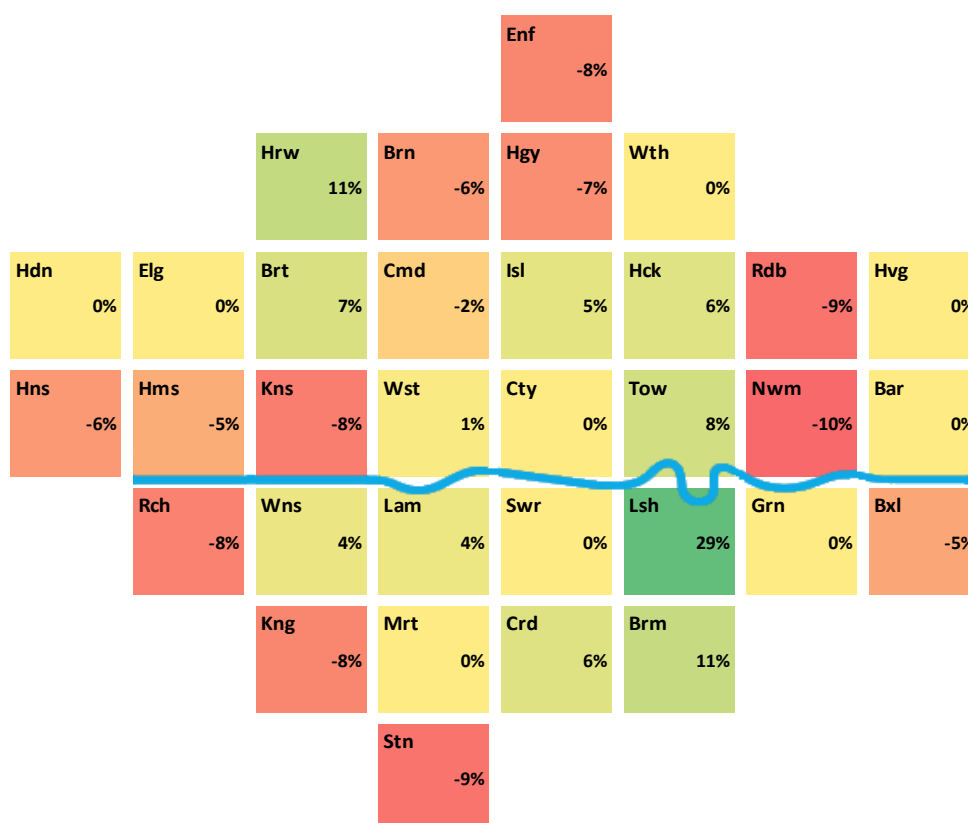
The data covers the period from 2001 to 2018. Pub numbers are rounded to the nearest 5, while employment figures are rounded according to the size and nature of the estimates (see [ONS](#) guidance for more details). This analysis distinguishes between "small" and "large" pubs. Small pubs are defined as those with fewer than 10 employees, while large pubs are those with 10 or more employees.

Pub numbers in London 2017/18

Summary

- Previous reports have shown that the number of pubs in London has fallen by a quarter since 2001.
- In 2017/18 pub numbers in London were virtually unchanged compared with the previous year, with a small net increase of 10 pubs, from 3,530 in 2017 to 3,540 in 2018 (0.3 per cent).
- Pubs growth has been the strongest in inner London.
- There was a mixed picture when looking at London's boroughs.
 - The increase in pubs between 2017 and 2018, was driven by growth in 11 boroughs. These were: Lewisham (20 pubs), Bromley, Hackney, Islington, Tower Hamlets (10 pubs each), Brent, Croydon, Harrow, Lambeth, Wandsworth, Westminster (5 pubs each).
 - Only a third of boroughs saw pub numbers grow, with 13 boroughs seeing pub numbers decline and 9 seeing no change (see figure 1).

Figure 1: Growth in pub numbers (per cent), 2017-2018



Pub numbers by size of pub

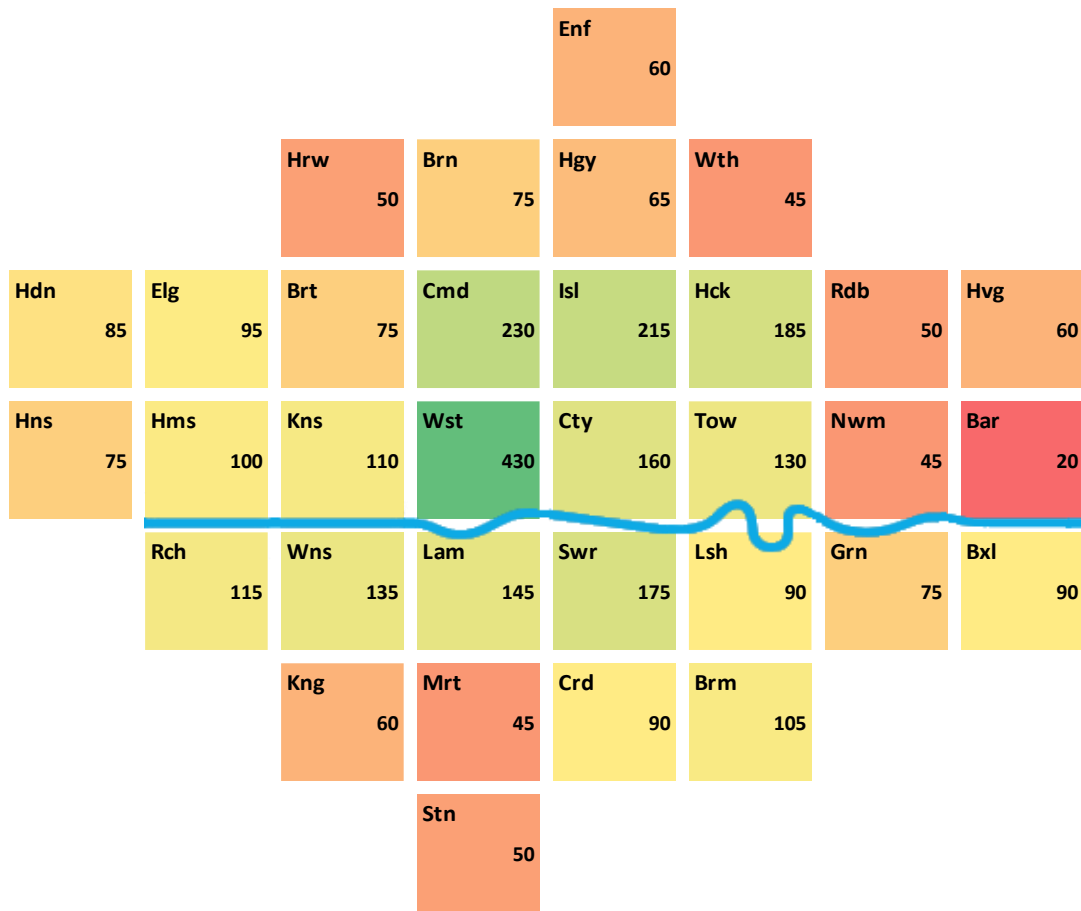
- Previous GLA Economics work has shown that since 2011, the number of large pubs has been increasing, while small pubs have declined in most years since 2003. In 2016, for the first time, the number of large pubs overtook that of small pubs.
 - For large pubs, past trends continued into 2017/18, with the number of large pubs rising from 1,845 in 2017 to 1,855 in 2018.
 - However, the number of small pubs in London went up comparative to past years and rose from 1,680 in 2017 to 1,690 in 2018.

Distribution of pubs by borough

- Most of London's pubs are situated in inner London boroughs¹. For example, in 2018 Westminster was home to 430 of London's 3,540 pubs – the highest share of any borough (12.2 per cent). The boroughs with the next highest pub numbers were Camden with 230 pubs (6.5 per cent) and Islington, which had 215 pubs (6.1 per cent)
- Overall, 62.7 per cent of pubs were in Inner London boroughs.
- Barking and Dagenham had 20 pubs in 2018, making up the lowest share of pubs in any borough (0.9 per cent) (see figure 2). This was followed by Merton, Newham and Waltham Forest, which each had 45 pubs (1.3 per cent).

¹ While the City of London is not strictly speaking a borough, it is treated as one for the purposes of this note.

Figure 2: Number of pubs by London borough, 2018



Source: IDBR

Table 1: Pub numbers in 2018 by borough and total change since 2017

	Pubs - 2018	Change 2017/18
Barking and Dagenham	20	0
Barnet	75	-5
Bexley	90	-5
Brent	75	5
Bromley	105	10
Camden	230	-5
City of London	160	0
Croydon	90	5
Ealing	95	0
Enfield	60	-5
Greenwich	75	0
Hackney	185	10
Hammersmith and Fulham	100	-5
Haringey	65	-5
Harrow	50	5
Havering	60	0
Hillingdon	85	0
Hounslow	75	-5
Islington	215	10
Kensington and Chelsea	110	-10
Kingston upon Thames	60	-5
Lambeth	145	5
Lewisham	90	20
Merton	45	0
Newham	45	-5
Redbridge	50	-5
Richmond upon Thames	115	-10
Southwark	175	0
Sutton	50	-5
Tower Hamlets	130	10
Waltham Forest	45	0
Wandsworth	135	5
Westminster	430	5

Source: IDBR

Employment in London's Pubs

Summary

- The number of people employed in London's pubs stayed the same between 2017 and 2018 at 46,000. This is the second year in which employment in pubs has been static, having fallen from a peak of 47,000 in 2015.
- There was an increase in employment in small pubs from 7,000 in 2017 to 8,000 in 2018 (equating to a 14.2 per cent increase). (See table 2 for a breakdown by borough.)
- This was offset by a decrease in employment in large pubs from 39,000 in 2017 to 38,000 in 2018.
- Since 2011, employment in small pubs in London has declined in most years, while employment in large pubs has typically increased. This may be due in part to pubs increasingly serving food and drink, which requires more waiting and kitchen staff.² While the 2017/18 period did not fit this trend, employment in small pubs is still below its 2011 level (10,000 jobs), while employment in large pubs is above the 2011 figure (29,000).

Pay in London's pubs

Data from ONS Annual Survey of Hours and Earnings (ASHE) shows that 71 per cent of employee jobs in London's pubs are paid below the London Living Wage (LLW).³

- There have been improvements in recent years with the share of jobs paying below the LLW falling from a high of 83 per cent in 2015.
- The share of jobs paid below the LLW in pubs was higher than in the accommodation and food sector overall⁴ (see figure 6).
- The high share of jobs paid below the LLW may reflect the type of people working in pubs. Half of people working in elementary service occupations (the occupational group that includes bar staff) are aged 16-29 and just over half (52.1 per cent) work part time. Both these features are associated with low pay.⁵ Working part-time is also associated with a reduced chance of escaping low pay.

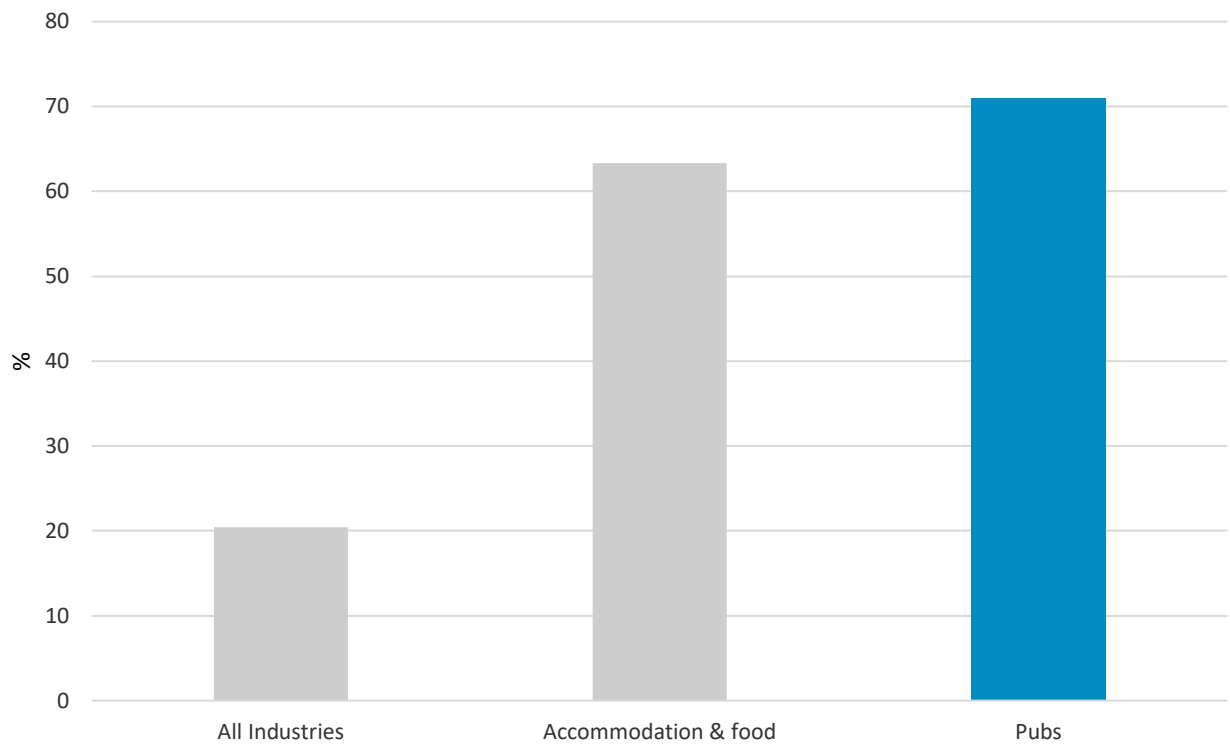
² ONS (2018) [Economies of ale: small pubs close as chains focus on big bars](#)

³ The reference period for the ASHE data is April 2018, at which time the London Living Wage was £10.20 per hour.

⁴ This is the industry group which includes pubs.

⁵ Resolution Foundation (2014) [Escape Plan: Understanding who progresses from low pay and who gets stuck](#)

Figure 3: Employee jobs in London pubs paid below the London Living Wage (per cent), selected industries, 2018



Source: ONS ASHE

Table 2: Change in jobs in pubs by pub size and London borough, 2017/18.

	Small pubs		Large pubs	
	Total change in jobs	per cent	Total change in jobs	per cent
Barking and Dagenham	-30	-40.0	25	16.7
Barnet
Bexley	-50	-20.0	-100	-10.0
Brent	25	14.3	50	12.5
Bromley	25	11.1	-250	-20.0
Camden	0	0.0	0	0.0
City of London	50	20.0	250	11.1
Croydon	-25	-11.1	0	0.0
Ealing	0	0.0	100	14.3
Enfield	0	0.0	-100	-14.3
Greenwich	-25	-12.5	0	0.0
Hackney	-50	-11.1	250	16.7
Hammersmith and Fulham	-75	-37.5	0	0.0
Haringey	-50	-33.3	100	14.3
Harrow	50	66.7	0	0.0
Havering	0	0.0	-100	-12.5
Hillingdon	25	16.7	0	0.0
Hounslow	-75	-30.0	0	0.0
Islington	0	0.0	500	28.6
Kensington and Chelsea	25	14.3	-500	-33.3
Kingston upon Thames	25	20.0	0	0.0
Lambeth	0	0.0	0	0.0
Lewisham	25	14.3	0	0.0
Merton	25	33.3	-100	-16.7
Newham	25	25.0	-100	-25.0
Redbridge
Richmond upon Thames	0	0.0	-250	-16.7
Southwark	50	14.3	-250	-11.1
Sutton	0	0.0	-50	-10.0
Tower Hamlets	50	16.7	100	11.1
Waltham Forest	-25	-25.0	-50	-12.5
Wandsworth	25	14.3	0	0.0
Westminster	100	12.5	0	0.0
London	1000	14.3	-1000	-2.6

Source: IDBR. Note: Data may not sum due to rounding rules, which vary depending on estimate size. Jobs data by size of pub is not available for all boroughs and “..” is used to denote these.

Comparison with UK and city regions

Comparison with the rest of the UK

- Like London the rest of the UK has seen an increase in large pubs since 2011, with 10,440 large pubs in 2011 and 14,120 in 2018 (9.1 per cent of the UK total).
- The rest of the UK saw overall pub numbers decline from 35,395 in 2017 to 35,275 in 2018.
- In the rest of the UK, employment in pubs has increased from 401,000 in 2001 to 404,000 in 2018. Employment in pubs has been increasing since 2011, when 345,000 people were employed in pubs in the rest of the UK.
- However, the picture varies by the size of pubs. Employment in small pubs in the rest of the UK fell from 159,000 jobs in 2001 to 95,000 in 2018. Large pubs saw employment increase from 242,000 in 2001 to 404,000 in 2018. The growth of employment in pubs has been particularly pronounced since 2011.

Comparison with other city regions of the UK

- Recently released data from the ONS allows for comparison with the other city regions of the UK. Looking at other cities offers a more like-for-like comparison than the whole UK, as they are likely to be more akin to London in terms of economic characteristics.
- The decline of pub numbers in London is typical of UK city regions. Table 1 below shows that in all the UK's city regions, there were fewer pubs in 2018 than in 2001.
- Most city regions lost between 20 per cent and 30 per cent of their pubs between 2001 and 2018. London was alike other city regions, losing 26.8 per cent of its pubs compared to an average of 27.4 per cent.

Table 3: Change in total pub numbers for city regions (per cent), 2001 – 2018

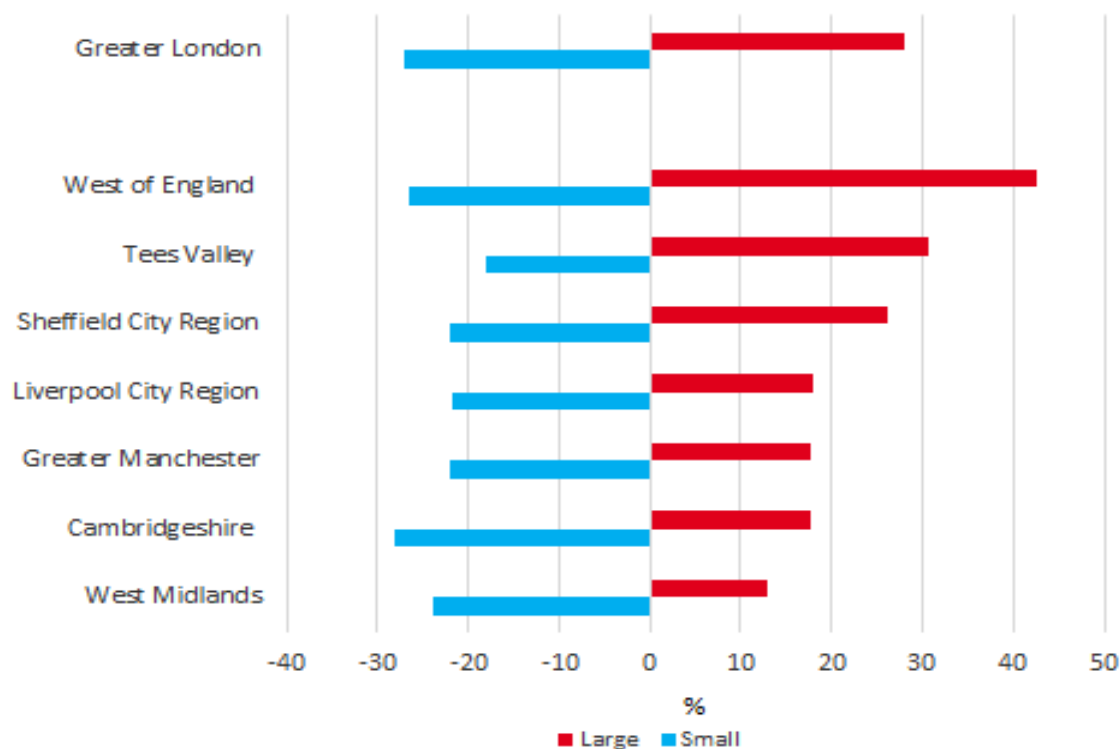
Area name	per cent change 2001-2018		
	All pubs	Small pubs	Large pubs
Tees Valley Combined Authority	-24.0	-34.9	-8.1
West of England Combined Authority	-19.2	-37.8	18.8
Cambridgeshire and Peterborough Combined Authority	-22.6	-43.4	-15.2
Greater Manchester Combined Authority	-32.8	-39.4	-15.2
Liverpool City Region	-24.2	-33.8	-5.7
Sheffield City Region	-28.8	-32.1	-21.6
West Midlands Combined Authority	-41.0	-50.0	-23.0
Greater London	-26.8	-50.1	28.4
United Kingdom	-26.1	-41.2	16.9

Source: IDBR

City regions size of pubs

All city regions have seen numbers of large pubs increase since 2011, while small pubs have declined between 2001 and 2018. London and the West of England were the only areas where the number of large pubs has surpassed 2001 levels. This is despite the numbers of large pubs growing in all regions since 2011 (see figure 4). Since then, the fall in total pub numbers has been driven by the decline in small pubs.

Figure 4: Growth in pub numbers by city region and pub size (per cent), 2011-2018



Source: IDBR

City regions employment in pubs

In terms of employment, most city regions saw declining job numbers in pubs between 2001 and 2018. However, Greater London is one of two city regions to have more people employed in pubs in 2018 than in 2001.

Table 4: Change in employment in pubs for city regions (per cent), 2001 – 2018

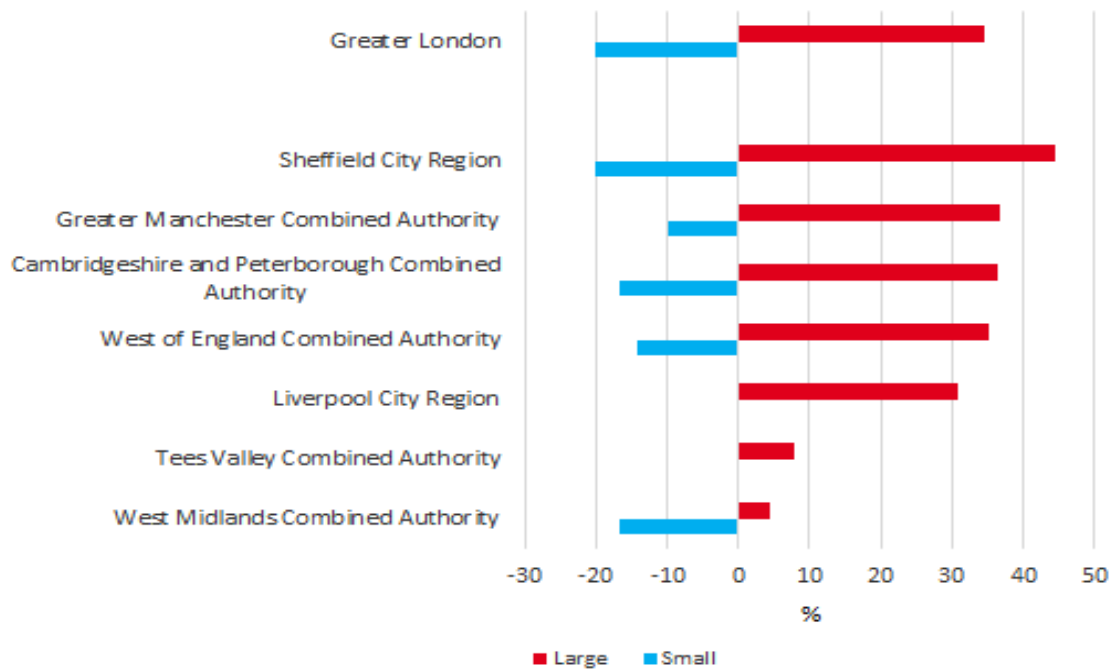
Area name	per cent change 2001-2018		
	All pubs	Small pubs	Large pubs
Tees Valley Combined Authority	-25.0	-50.0	-17.6
West of England Combined Authority	0.0	-33.3	27.8
Cambridgeshire and Peterborough Combined Authority	11.1	-44.4	50.0
Greater Manchester Combined Authority	-10.5	-35.7	4.0
Liverpool City Region	0.0	-35.7	21.4
Sheffield City Region	-20.0	-33.3	-3.7
West Midlands Combined Authority	-25.0	-50.0	-14.3
Greater London	7.0	-52.9	50.0
United Kingdom	1.4	-41.5	29.0

Source: IDBR

City regions employment growth

Between 2001 and 2018, employment in small pubs declined in all city regions. Employment in large pubs, however, was a bit more mixed (see Table 4), with London being one of the city regions to see an increase. Since 2011, the growth of employment in large pubs, across all city regions, has been prominent, although employment in small pubs continued to decline over this period (see figure 5).

Figure 5: Employment growth in pubs by city region and pub size (per cent), 2011-2018



Source: IDBR

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