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Title: A Pint-Sized Conversation: Publicans, Brewers, and Academics on the UK Beer, Pub and Brewing Industry

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Most academic research still takes place within a bubble more often than not separating itself, in a number of ways, from the 'real' world. Academic projects are often designed without engaging with practitioners, theory is often more valued than usable solutions and publications are written in complex, dense and inaccessible language. There has been much written about the resulting academic practitioner divide, also noted as a theory-practice divide and that "this dominant model has come under increasing scrutiny and criticism on the basis that it is increasingly divorcing the research conducted in business schools from the realities of practice" (Hughes, Tapp & Hughes 2008: 223). The academic-practitioner gap has been explained by different styles and motivations for sharing and dissemination of research, where academics are focused on accuracy and theory and practitioners on simplicity (Bansal et al, 2012). Excuses such as talking different languages and having different time horizons (Bartunek, 2007; Bansal et al, 2012) are given as reasons why the relationships do not work and institutional motivation and reward are given as reasons for academics not to pursue this route (Nyilasy and Reid, 2007; Hughes et al, 2008).

Alongside this, while becoming increasingly supported, interdisciplinary research is also sidestepped by academics even though it can bring holistic, innovative, problem-focused solutions to real-world problems (Aboelela, 2007). Van Rijnsoever and Hessels (2011) also highlight how interdisciplinary and impactful research can be collaborative and synergistic. They state "...interdisciplinarity is often associated with application oriented research....implies that the degree to which researchers are orientated towards practical applications correlates with the degree of interdisciplinarity" (van Rijnsoever and Hessels, 2011: 486).

For academics, changes in the Research Excellence Framework (REF) from 2014, where in particular impact case studies became part of the requirements for each university, have affected the impact environment in universities. Impact case studies have increasingly taken a larger share in each REF and there are suggestions that it will be of even more value to institutions in the next REF in 2029. The good thing about the integration of impact within REF is that impact-focused academics are finally being supported and rewarded for impact-facing work. However, like any other performance assessment in academia the fact that it is being measured produces game playing and control with some research suggesting that "as research impact becomes institutionalised within universities' measurement infrastructures,

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higher education institutions become impact gatekeepers, filtering out narratives that are deemed overly complex or insufficiently persuasive, while perpetuating particular approaches to recounting tales of impact that are deemed likely to perform well” (Bandola-Gill and Smith, 2022: 1857).

Some journals have also dedicated space to impact such as the *European Journal of Marketing* which welcomes impact articles to be submitted (<https://www.emeraldgrouppublishing.com/impact-articles>). For impact researchers these moves towards acceptance in academia are welcomed but happening more slowly than would be liked.

For any academic doing or wishing to be involved in impact research and for good impactful research to be completed we first need to listen to the practitioners, those on the front line, those who see the behaviours and phenomenon we are interested in first hand. Where this happens in research it often happens in conversations behind closed doors, after much time building relationships and gaining trust. It doesn't always have to be that way. We wanted to be able to build a space for practitioners' voices here, in this special issue, to inspire and guide future research as well as to check in on our thinking. We have chosen to do this through a conversation, where selected practitioners and academics are invited to answer questions in the style of a conversation (see Arvidsson et al., 2018 for another example). Questions are e-mailed, responses reviewed, and this is edited to form a conversation which is presented here. Three practitioners (to reflect the front line) and two academics (engaged in interdisciplinary research and work with practitioners and consumers) were asked to take part in the conversation and did so over March and April 2025 - their biographies are included at the end of the conversation.

We hope you enjoy reading the conversation as much as we did putting it together!

Victoria: What do you think is the biggest current threat to our pub and beer industry in the UK (and why)?

Kelly & Bob: This is quite a broad subject and difficult to narrow down to one threat, particularly as the pub and beer industry itself covers a wide variety of businesses and interests. We think it's probably best to look at this from our perspective running an independent small brewery, as well as having two small, free-of-tie pubs.

As threats to our particular areas of the industry, a major concern is the “Cost of Living Crisis”. That is not necessarily to say that people have no money to spend and don't want to go out, because many people have plenty of money and are still regularly going out for food and drinks; and even amongst those with limited budgets, some are choosing to prioritise experiential spending such as in the pub rather than just at home. But there is a lot of pressure on small businesses, like pubs, from rising wages and taxes designed to ease the “Crisis”.

The result of this is that breweries are having to compete for space on the bar more fiercely. And, increasingly, that competition doesn't take the form of brewing better beer, more interesting styles, higher quality, or a strong sense of business values. Instead, competition

comes in the form of bigger discounts, free stock, free glassware and POS, cellar refurbishment, days of free beer for staff parties. Interestingly, these are the exact same tactics that “Craft Beer” was supposed to be a response to and move away from.

Paul: This is interesting to hear. In my own business I make a point of never asking for any of this type of support from independent suppliers, all the more so while times are so hard with this ongoing cost of living crisis (which I fear is only actually going to get worse for some time yet in the current global political climate). The most we might ask for is beer mats or perhaps bar towels, and if they are not available that's also fine.

I would however be perfectly comfortable to request more costly support from any corporate brewing giant that I decided to do business with. I am keenly aware of how uneven the playing field is in the industry and how tight margins are for smaller independents.

For me one of the main pleasures of dealing with small independent producers is in knowing that I am able to use the rare commodity of our free of tie pubs to support them, so the last thing I would expect is to be costing them money whether by asking for discounts or other costly support.

This is one of the many ways that a hard-nosed outsider looking in to my business would probably think I'm either naive, idealistic or stupid (they would probably feel the same way about us being an accredited Living Wage employer), but I feel our underlying values have served our pubs very well because they can be clearly perceived, understood and appreciated by like-minded customers.

There is a strong link of mutual understanding that runs through us as a venue, our independent suppliers and our customers. Essentially our approach is to prioritise quality in every way we can, in the assumption that people will perceive it and respond favourably, which is precisely what has happened. This means profitability has followed as a function of quality.

It is an approach that I also see in the craft sector, and it I feel it amounts to a bonding mentality that stands in direct opposition to the openly profit-driven behaviour of the corporate side of the industry where certain definite returns on capital are expected and demanded.

Kelly & Bob: You use the phrase “rare commodity” to describe your free of tie (FOT) pubs, and unfortunately that is the case – FOT pubs that breweries like us can access are rare, and, certainly in a crowded market like Bristol, are able to use that rarity or scarcity to pit breweries against each other in the way we described. It's also another example of how some ‘small, independent, local breweries’ have grown over the last ten-ish years to actually become big players, not just locally but particularly locally, with the corresponding resources for supplying FOT pubs with freebies, etc., which puts the pressure on the smaller businesses like ours to do similar. We're not seen as different businesses in terms of scale, it's a case of “well so-and-so gave us glassware/bar runners/free stock/a huge discount, so why can't you – you're all small, local independent breweries...” This comes back to the unevenness of the playing field that you mention.

Similarly, there seems to be quite a lack of “underlying values” in too many of the pubs we supply. The number of times we've heard “I'm not buying from them again, they were too

aggressive/service is terrible/they never invoice the same price twice” – all things we would pride ourselves on being the opposite of and striving really hard to do well, even when we were really small just two or three people – and then two weeks later that goes out the window because “well, they gave me a bigger discount” – it’s incredibly frustrating when you DO have values/morals/ethics that you’re not prepared to compromise on.

It’s absolutely a buyers’ market at the moment when it comes to buying beer – there aren’t enough pubs like yours (and ours) run by people like you (and us) who do believe quality, independence, working together, attracting like-minded customers, building a community and running a ‘good’ business are as important as making money.

Additionally, as beer becomes more commoditised and devalued, and more “Craft” brands become brewed for supermarkets, the more the consumer sees no difference between the beer on the supermarket shelf, and the beer on the bar in a pub. Pubs then become seen as an expensive place to buy a beer and consumers drift more towards buying from supermarkets and drinking at home.

Victoria: Thomas and Robert, what do you think?

Thomas & Robert: It would be helpful to start with a quick caveat that there have been periods of boom and bust for British pubs throughout history and that the form and purpose of pubs has varied quite a lot over the centuries. Although it is not a case of an uninterrupted golden age of thriving pubs until recent travails, there is a worrying confluence of issues or threats that have come to a head in recent years.

If we had to find a single term to label this confluence of threats, it would be ‘value’ (which you already start to note). It is first important to acknowledge the harsh economic realities facing a pub sector hit by multiple increases in costs and overheads. There is a very real danger of many pubs simply being too expensive to run once the hikes in energy bills and business rates are added to by the wholesale cost of drinks, food and staffing.

Yet the price people are willing to pay for a pint in a pub hasn’t kept pace and this is why we might say ‘value’, rather than just ‘costs’, as being the biggest threat. ‘Value’ speaks to wider issues about how pubs are thought of and how the beneficial and pleasurable qualities of drinking in a pub - as opposed to consuming supermarket bought alcohol at home - are accounted for in how, when and where people spend what is, for all too many, a diminishing level of disposable income.

When the cost of beer bought in the on-trade has quadrupled in 40 years but in the off trade it has only doubled, what is the perceived value of a drink in a pub compared to far cheaper supermarket alcohol drunk at home? We might say the atmosphere and opportunity for social contact, and there are interesting academic studies to support this (Mount & Cabras, 2016; Thurnell-Read, 2021). But there appears to be a limit to the premium that consumers are prepared to pay for this experience in the face of opportunities to drink more cheaply at home and a broader, gradual shift away from the pub as a primary site of leisure. There is also a sense of frustration that the ‘powers that be’ (local councils, national governments and pub-owning corporations) fail to recognise the unique importance of many pubs to their communities or only value them as a bookkeeping ‘asset’ that in failing to provide an adequate

rate of return on investment finds itself closed and 'redeveloped' with little sentiment or sympathy.

Paul: I agree that the issue of value is crucial, and the customer perception of value is clearly a very broad spectrum. This is precisely why it is so crucial that pubs are allowed to have a free and organic relationship with their locality and customer base. Simply imposing a preconceived model on a pub will not in itself create the feeling of true value that inspires lasting loyalty and devotion. That comes from a symbiotic relationship whereby the pub is free to mould and adapt to the needs and desires of the community that supports it.

This is actually a very complex situation best dealt with by a skilled operator embedded in the local community, someone who takes the responsibility seriously and has the sensitivity to understand what works and what doesn't. The most beloved pubs are always those where this has been achieved well.

It is ultimately a deep emotional relationship that bonds a group of customers to a pub, and once that is achieved everyone will naturally pull together as a group to support the place to the extent of their ability. These are the pubs that will be best placed to weather rocky times, as their customers will see their very existence as an essential component of their life. The customers of such a pub will also have a clearer mental image (and dread) of the gap that would be left by its loss and will therefore tend to do whatever they can to try to retain it, although it is still scandalously easy for their wishes to be overridden.

Thomas & Robert: Great point Paul! In our research we've spoken to people who are passionate advocates and campaigners for pubs, and they would say that we need more people to step up and support pubs through regular use. This 'use it or lose it' framing is vital but we're also finding that the sense of loss people experience when a pub closes does not neatly map onto a regular pattern of use, with pub closures having important symbolic dimensions beyond their everyday social functions. The closure of pubs can be felt not just as a loss of a place to drink, but as a palpable manifestation of a more general decline in community and connection which people rightly mourn (Thurnell-Read, 2024). We have recently published an analysis of UK news coverage of pub closures since the year 2000 and a recurring trope is the framing of pubs closing being a threat to the cultural identity and social fabric of the nation (Deakin & Thurnell-Read, 2025).

Paul: If we are talking about pubs alone then I think the absolute bottom line answer for me would have to be the fact that, in the short term, any pub will be less financially valuable as a going concern than it will be for any number of alternative uses. This fact, accompanied by the weak protection afforded to pubs in UK planning law, make them an easy target for unsuitable freeholders, whether corporate bodies or individuals, who see in them only the chance to turn a quick short-term profit. A cynical individual who purchases the freehold to a pub might go straight for redevelopment value as quickly as possible, whereas a corporate owner might sweat their asset for excessive financial profit for as long as possible (see below), starving it of the investment it needs in the process, before disposing of the depleted and dilapidated wreckage. Ultimately the end result will be the same. A lost pub - each one an irreversible case of squandered economic and cultural potential.

The only way I can see to stop this is far stricter planning protection where pubs are recognised as a special class of building with an inherent value that far exceeds their monetary price tag as a property. This would require a major change of mindset at both policy and wider cultural level.

If we are talking about pubs and beer together, then I would give an answer quite closely related to the one above.

Again, it is down to players that are in the market for entirely the wrong reasons, which is to extract as much financial gain as possible at the expense of everyone else.

In this case it is a failure by our policy-makers to perceive the fact we do not have a free and fair market in the UK beer and pub sector but instead have a complex cartel of powerful mostly offshore-owned brewing and pub-owning corporations that has gained an unhealthy dominance, and whose members collectively collude to defend their market turf from all outsiders. Their collusion takes many forms in terms of supply relationships, but its ultimate expression is the beer tie itself which is an anomalous exception to our competition laws that denies our own domestic independent brewers free access to around half of our precious and irreplaceable purpose-built UK pubs.

The inexorable trend in the tenanted pubs affected by this has been the removal/exit of longstanding conscientious community-orientated tenants and an increased corporatisation and homogenisation. A failure by any such pub to deliver a sufficiently excessive level of profit to the corporate owner will lead to a swift and unsentimental disposal, often for lucrative alternative use as described above. The independent brewing sector has been forced to find alternative routes to market via taprooms and craft bar conversions wherever possible, and the widespread success of such venues indicates that there is ample demand for the huge range of UK independent beers which are unfairly excluded from our pubs at great collective cost.

Victoria: Thanks for your responses to the first question. The next question is: If you suddenly found yourself in a government position (as an MP, councillor, civil servant at local, national level) what would you do or change to support our pub and beer industry in the UK?

Paul: This is a very big question that could produce a very long answer, so I will try to summarise.

I am going to put myself into the shoes of a policy maker with influence over national issues, because that's the level where real action is needed. There is actually very little scope at local level to make the difference needed to fully address the fundamental problems that pubs face in the UK. Most of those problems are actually a product of decades of failure at national government level.

For example, one of the main areas open to local politicians, that of planning decisions, is already fatally flawed, because the national planning framework is insufficiently robust and explicit when it comes to pub protection. This has led to many local planning officers taking an overly timid approach, with the result that they are all too often unsuccessful in protecting even perfectly viable pubs from damaging alteration or loss when faced with a determined

developer. To make matters worse, even where local planners continue to put up an effective fight with successive refusals, they are often overruled at appeal by officers from the national Planning Inspectorate.

The best thing a local council can do at present is build strong, detailed planning protection for pubs into their local plans, but there are few cases where this has been done as effectively as it could, and even a sound local plan needs to be backed up with determined enforcement, something which carries a significant financial burden and risk for increasingly cash-strapped local councils.

So, taking the national planning framework as the first example, I would strongly argue that the real failures are to be found at national level, where we have had decades of governments that have failed to understand how the pub industry works, why it is in such a crisis, and how much better it could be with an entirely different policy approach. Politicians are always very keen to use pub references as populist shorthand, or indeed pubs themselves as superficial photo-op backdrops, in an effort to gain credibility with the electorate, but very few delve deeper to see any of the real problems.

Indeed, the overwhelming tendency has been for Westminster politicians to take entirely on face value the version of the industry presented to them by the best-resourced and best-placed lobbyists, which are of course those permanently on hand in the corridors of Westminster courtesy of funding provided by the largest players in the industry.

This fact alone accounts for many of the persistent problems that afflict the industry, and if I were in a position to make a real difference the one thing I would change is to actively minimise the influence of these paid lobbyists in favour of an open and transparent fact-finding mission to reveal what is really happening on the shop floor of the sector. Alongside this, I would initiate a government campaign to spark a real national conversation about the vital and hugely positive role pubs play in our local communities, our economy and our national cultural life.

Ideally this would form the focal point for a far broader national conversation about the loss of community infrastructure in its many forms, and the desirability of investing in the reinstatement of community space for the health and wellbeing of the population at large, with the economic justification of improving cohesion and a collective identity that can overcome the damage done by the atomisation of society over recent decades. A successful pub is after all a microcosm of the great benefits that can be achieved with collective effort in a broader sense, when you have a community who all pull in the same direction even when via unspoken, intuitive agreement.

Industry lobbyists and other compromised spokespeople purport to speak for the whole industry but the truth is they only represent the interests they are paid to represent by their membership, and the membership of the most vocal and influential is dominated by those profit-driven corporations who wish to fiercely protect their own unfair market dominance as well as their “sovereign” property rights as freehold owners of roughly half the nation’s pubs.

Their pernicious and ubiquitous influence has misled successive governments into making poor decisions regarding taxation, competition, industry regulation and planning, decisions that have too often pandered to the priorities of largely offshore corporate capital to the great detriment of communities across the UK. The evidence of this failure of policy at a national

level could not be clearer, not only in the appalling pub closure statistics, but in simple physical terms on high streets everywhere, where the scars of boarded up and dilapidated pubs are clear for everyone to see with their own eyes.

Thomas & Robert: This point about dilapidation really resonates with something we have seen in our current work on the impact of pub closures on communities. Closed pubs are a magnet for vandalism, arson in particular, and it feels they are often left to rot intentionally as it might strengthen an application for demolition and change of use when the building becomes an eyesore and councils fear associated anti-social behaviour. Damage to buildings can quickly add hundreds of thousands of pounds to the cost of reopening as a pub. So, there is a perverse incentive for a developer to wilfully allow a site to deteriorate. Then even locals who mourn the closure of a once cherished pub might fall in line and think it's better replaced with something new at least, shops or residential property inevitably.

Paul: The success rate of pubs that are allowed to operate in a free and open market under the stewardship of a dedicated operator is vastly underestimated at policy level, as is the value they have, not just to their communities but to the broader economy. As with the success rate of newly opening craft venues and taprooms, this illustrates that contrary to the prevailing narrative (which is often shamefully pushed by industry lobbyists themselves) consumer habits across the UK have not changed so much in just a few short years to the extent that thousands of pubs have been somehow rendered non-viable. Rather the problem is that most struggling and closing pubs have been held back for literally decades by restrictive and extractive trading practices and could thrive in a fair and open market – as they so often do whenever they are given the chance free of profiteering shackles.

By consciously changing the basic terms of the national political conversation about pubs we could effectively harness public support to tackle all the relevant issues that would genuinely help pubs (and independent UK SME brewers and other producers at the same time), such as an end to anti-competitive practices, fairer taxation, a correction to the absurd differential between pub pricing and supermarket pricing and much stricter planning laws that place far greater emphasis on the inherent value of a pub as a local asset. All of these matters need to be discussed and determined openly on the basis of real evidence gathered from pub operators themselves, free from the insidious and toxic influence of those remote corporate interests that already massively dominate the industry through their unfair and closely guarded advantage, and that have manipulated successive governments for far too long.

Thomas & Robert: We have all identified the dramatic increases in the cost of running a pub as the major threat to the economic viability of the business. With that in mind, it is unsurprising that the 'action' or 'change' that we've seen called for most often and most vocally in our research are for steps to tackle taxation, duty and in particular business rates. The Business Rates Relief reduction of 75% dropped to 40% in April 2025, resulting in an instant and potentially crippling rise in costs for many pubs. There has also long been a concern that the Value Added Tax (VAT) charged on food served in pubs further exacerbates the challenge from supermarkets, who do not add VAT to many food items and can offset low margins on discounted alcohol promotions against more profitable goods and services elsewhere in the store. It all adds up as a possible disincentive for people to consume alcohol in pubs as part of a meal in a social setting as opposed to at home where the social benefits offered by a well-

run pub are lacking (although worth noting the nuances of a home drinking culture associated with comfort, relaxation and privacy as is well examined by Brierley-Jones et al., 2014).

However, there are concerns that some changes, such as a cut in the duty paid on beer, would benefit the profit margins of the largest corporate actors (big breweries and pubcos) and do less to help smaller independents. Part of the case for reducing the business rates on a pub would rest on the special social function pubs can and do play at the heart of community life. It would be important to be open to different ideas of what a community pub is and avoid judgment or snobbery about which communities it might serve. We can say that the only pub in a village or rural area ought to receive special support but that fails to capture the importance of many urban and suburban pubs that serve their communities in important ways. With a sector as diverse as this in terms of ownership structures, operating practices, customer loyalties and public perceptions, it would be a formidable task to craft a policy that targets just the most deserving community pubs.

There are some interesting precedents of policies that can effectively target smaller operators. From 2002, we saw with the Progressive Beer Duty or Small Brewers Duty Relief how a policy can recognise the unique value of smaller operators and the importance of such assistance. The small breweries the policy assisted felt they were active employees and agents of growth in their local economies and therefore deserved and needed support that should not be available to larger national and international operators. Again, we're back to the question of normative distinctions between the worth and value of some pubs and breweries over others, which is a tricky path to tread.

Victoria: Kelly and Bob, what do you think you would do if you were in charge?

Kelly & Bob: This question we found harder to pin down an answer to than the first question. I suppose 'what is the problem' is easier to analyse than 'how do you solve it'. We also spent a lot of time wondering how we change/support our pub industry, because that would/should in turn support our beer and brewing industry. But as we are 'the brewers' as opposed to Paul being 'the pub guy' we have tried to think about it more from that particular perspective.

First of all, not to be pessimistic but it's too big of a job for one person, to bring about the support and change needed for this industry to survive without many, many further closures, of businesses across the industry, and losses of historic pubs. And then to move beyond that, the 'pub and beer industry in the UK' is such a big, disparate thing with so many different types and sizes of businesses within it that whatever someone comes up with to try to make a positive change for one sector of the industry could very likely have unintended negative consequences for other sectors. And there's potentially no real way of understanding these consequences until changes are implemented and results play out.

Secondly, not to be facetious, but if we were an MP with a £90k+ salary we'd spend a lot more money in our local pubs directly supporting them! That's a darn sight more than we earn, combined, and we still do all we can to spend time and money in Bristol's pubs – because we think they're vitally important to the cultural, social and historic fabric of our city (and country, of course), not to mention a huge economic contributor as well.

But if we think the biggest current threat to our pub and beer industry is the “Cost of Living Crisis” (discussed above) then it leads us to think that any changes made would need to be fundamental changes to the whole economic situation of the country and our customers, in order to have a longer term benefit to the pub and beer industry. We can’t just say ‘we need to change this in order for pubs and breweries to have a better time of it’ if it’s our customers’ whole ways of life that needs improving.

That seems like too big an ask, though, so to bring it slightly smaller-scale or focussed – a cut to beer duty would be good. We pay amongst the highest duty on beer, certainly in Europe, and a large portion of our direct costs as a brewery are this.

Of course, this wouldn’t allow us to compete any more effectively with our fellow brewers, if their tax is also going to be lowered, so doing something about the beer tie would, we think, have the single biggest positive impact on our brewery business (agreeing with Paul above). If changes could be brought in to prevent publicans being restricted in the beers they can sell, then we think it will stimulate a lot more diversity and interest in pubs. Publicans will be able to tailor their offer more to what their customers want (as Paul has noted), and also open up the marketplace to all breweries. We can’t compete on price with the big breweries, but we can compete on being local and independent, factors that have had increasingly greater importance to many drinkers recently, but currently the tie stops pubs buying beer based on those factors regardless of price.

Victoria: That's all really interesting. So one final question. What do you think the future for our pub and beer industry in the UK is?

Paul: This is a big question, and one with multiple possible answers largely depending on policy decisions that urgently need to be made by this government.

In my view, successive governments have failed to grasp and harness the full potential of the UK pub and beer industry – largely because they have been far too credulous of the well-organised, well-funded and highly partisan lobbying efforts of those powerful players in the industry who stand to gain enormously by a continuation of the status quo as I have already mentioned².

² Governments have taken comfort in the messaging they have received, which has essentially been that, other than potentially tinkering with taxation, they are not really required to do anything because the sad decline of pubs has been down to factors largely outside their control, such as changes in consumer habits, the availability of other sources of entertainment, demographic shifts and healthier life choices. This has saved politicians the trouble of looking more deeply into the issues affecting pubs and beer, and risking finding that the picture is not so simple, and that in fact fairly radical policy action is needed, not just in taxation, but also in terms of competition issues, planning policy, industry regulation to curb unfair practice, differential pricing in the on- and off-trade and general public messaging when it comes to pubs. All of these issues are deliberately downplayed by the dominant lobbyists because any meaningful change poses a threat to the profit margins, market share and sovereign property rights currently enjoyed by their corporate paymasters. The sole goal of the corporates is inevitably to protect and maximise their revenue. In terms of pubs this particularly includes protecting all the unfair advantage they have in the sector, including the right to not only own an excessive number of pubs but to operate an anti-competitive vertically-integrated tied supply system within an apparent complex cartel, which basically supercharges the huge advantage they already enjoy due to their sheer size, wealth and power. It is a situation where they win at the expense of literally everybody else, yet they very effectively shield that reality from policy makers via their constant lobbying efforts.

So I essentially see two possible futures for pubs and beer in the UK, one pessimistic, one optimistic, with an array of potential intermediate options falling somewhere on the spectrum connecting them.

The first, pessimistic scenario assumes continued inertia from our government. In this scenario we will see an unhindered continuation of the status quo, which will, without any doubt, mean an ever-deepening crisis for our traditional community pubs and our independent breweries.

All pubs will continue to battle with excessive costs and a disproportionate tax burden, just as they are at the moment, meaning they will only have the support of those fortunate enough to be able to afford to use them. This situation looks to be only getting worse, meaning the pool of support is ever diminishing, effectively making pubs increasingly an elite pleasure in contradiction to the basic ethos of pub culture as a glorious melting pot of humanity.

To compound this problem large numbers of our traditional pubs will continue to be blighted by extractive corporate ownership that further diminishes operator profit margins and also fatally restricts product choice. They will continue to suffer from underinvestment, operator churn and ongoing dilapidation resulting in a continued trend of permanent losses against the wishes of communities, and against the national interest.

Meanwhile those other traditional pubs lucky enough to be under independent ownership in the hands of a dedicated and committed freeholder will continue to expose the shortcomings of their corporate-owned equivalents by offering a diverse bespoke product range that actually appeals to a modern clientele, and doing so in well-maintained, idiosyncratic, cheerful surroundings. It will continue to be luck of the draw which kind of pub serves a given locality, and the corporate sector will continue to snap up such independent venues at any and every opportunity in order to impose their extractive practices, thus killing off what was actually good and valuable about those pubs in the process.

Permanent pub losses will continue, probably at least at the current rate of roughly 1,000 per year, meaning the continued chronic shrinkage of the UK's unique and irreplaceable traditional pub infrastructure and heritage. With the UK having lost one third of its pubs since the Millennium, and the number now standing below 40,000, this is a very bleak prospect.

It is worth also noting that the same is of course happening in the independent brewing scene, as Kelly and Bob have noted. Many breweries are currently being squeezed out of existence at a rate of roughly one per week, and the remaining ones are having to be ever more lean and agile to survive. The corporates are also always circling the sector seeking opportunities to snap up (and inevitably destroy in the process) the kind of cool kudos and authentic credibility they know they simply cannot generate themselves.

Meanwhile, back to pubs, in terms of wet-led venues³ the bulk of significant corporate investment will continue to be in short-lived, interchangeable, large scale city centre bar venue brands that yield maximum revenue from mass occupation, but which are of course not actually pubs and do not in any way reflect regional culture or provide any intrinsic value to

³ Wet-led venues are ones where the primary revenue comes from the sale of drinks (i.e. wet). Food can sometimes be available but it is not the primary focus.

their community. They are simply a commoditised space designed to shift large quantities of generic alcohol brands supplied by fellow corporations. Any ultimate net profit flows directly away from the local area, and usually entirely out of the UK economy.

Here I am of course describing the dominant drinking scene in most large town and city centres as things currently stand. It is worth noting that this is due in no small part to the fact that most towns and cities have now lost a great many suburban pubs (very largely at the hands of extractive pubcos and other unfit, opportunistic owners) that would have once provided an appealing, cohesive, community-based alternative to poorly controlled, atomised, often anti-social mass central drinking.

The same is essentially true where food-led corporate sites are concerned. Generic food “concepts” will be presented via chains either in central or perhaps family-friendly edge-of-town sites, (think ring road-junction eatery barns). They will be all about revenue maximisation and will be supplied through corporate supply chains and will in no way be about community or locality. This of course is in the very nature of corporatism.

Investment in actual traditional pubs owned by these corporations will continue to be limited to generic “refurbs” that comprehensively neuter any remaining individuality, shoe-horning what’s left into the latest “pub brand” concept dreamt up with the help of accountants and focus groups in head office. Elsewhere there will continue to be instances of basic remedial investment to render any remaining leasehold sites just superficially respectable enough to tempt yet another operator who fancies their chances at covering the wet and dry rent without knowing what they are letting themselves in for.

Elsewhere in the pub and beer on-sales sector, it seems likely that we will see the continued rise of smaller, innovative, independent drinking venues for the sizeable sector of the market seeking an alternative to the ubiquitous and generic experience offered by corporate bar and eatery brands, and also seeking a more exciting product range than many traditional pubs are permitted to offer. So, for example, we will continue to see small bespoke craft bars appearing in converted suburban retail and other commercial units, as well as taprooms at independent breweries⁴.

Indeed, to add insult to injury, such an alternative venue may well spring up (as so often happens already) within yards of the site of a former pub that has closed down for good, usually because it was either unable to offer the necessary customer experience due to the financial pressures and trading restrictions placed on it by a corporate owner, or because it was simply targeted for its property value as a development site by a determined and cynical purchaser.

⁴ Many of these spaces are extremely pleasant and well-run, indeed I have enjoyed visiting many taprooms and craft bars myself, but they will only ever be alternatives to pubs in the true sense, and their very existence is evidence of the utter failure of successive governments to properly value and protect our extraordinary purpose-built pub infrastructure in the first place. These new alternative venues tend to serve a targeted demographic, making them something of an echo chamber rather than being the genuinely open social network of a true pub. As physical venues they can only really offer a fraction of the amenity of a purpose-built pub, especially, for example, one with a large purpose-built cellar, perhaps a car park, function room, letting rooms and indeed manager’s living accommodation (the fundamental importance of which is hugely underappreciated).

This perfectly illustrates the absurdity and tragedy of the current reality, and accurately describes all that we are currently losing in our local communities and national culture under the status quo due to the abject failure of policy makers to perceive, grasp and address the clear ongoing crisis⁵.

Incidentally, I also fully expect the corporates to increasingly muscle in on this burgeoning independent micro scene with attempts at local “craft” offerings of their own, in the same way that supermarkets have opened local mini stores in recent years.

The continuation of this extremely sorry state of affairs is the first scenario.

The following alternative is the scenario I hope (it feels very much against hope) to see.

In this more hopeful scenario we see the penny finally drop with the government and competition authorities about how dire the current situation is, and also how entirely avoidable.

The current political inertia gives way to a dawning realisation of how hugely popular and productive it would be to revitalise much-needed community assets across the UK, including pubs, in order to bolster community cohesion and well-being throughout the population. It is further grasped that a relatively modest investment in such a mission would spark enormous benefits both socially and economically.

In terms of the politics of drinking, it is finally fully accepted at policy-making level that affordable, communal drinking in a responsible and well-run environment is inherently preferable to excessive consumption of very cheap alcohol in the home⁶.

The government acts to significantly curb the clearly excessive power of the remotely owned and controlled corporations that currently dominate both beer supply and pub ownership in the UK, in whose very nature it is to put their own profit before any true sense of stewardship or responsibility to the communities they serve.

Simple legislative changes are made in order to remove the unwarranted extra privileges currently afforded to the largest and most powerful players. The government is finally acting to create a truly free and fair market in pubs that will expand opportunities for the 1,700 or so

⁵ Traditional pubs were built on prime sites in order to perfectly service their communities, and we have allowed that priceless physical, cultural infrastructure to be degraded over decades in broad daylight through cynical asset-sweating and stripping, to the point that inferior alternatives are now springing up everywhere in order to satisfy the continuing demand that, contrary to the claims of many in the industry, still very much exists across the entire UK for good quality, well-run social spaces where responsible drinking is permitted

⁶ Targeted fiscal measures are put in place to address the current imbalance between the on- and off-trade, and also to reduce the high (and ever-growing) cost pressures on pubs that now place all but the very cheapest of them out of reach of many people on lower incomes. This would effectively constitute a “re-democratisation” of pubs within their communities, bringing people of all walks of life back together, in a comfortable, convivial, purpose-built environment to enjoy each other’s company (either with or without alcohol) on a level social playing field, as has always been seen as one of the main ideals of pubs.

independent UK brewers who have been kept kettled into around 6% of the domestic beer market for decades due to unfair policy that has only benefitted (mostly offshore) corporates.

Tenant publicans are by law released from the obligations of tied supply arrangements, thus opening wide the market to independent UK brewers that cannot currently benefit from supplying most of their own local pubs (at least 60% are currently foreclosed to them according to a recent SIBA study).

The excessive size of corporate pub estates is addressed and the excess pubs are made available to independent operators or indeed communities where there is no suitable independent buyer. Planning laws are strengthened enormously to protect pubs from being cynically ruined, closed and ultimately repurposed or redeveloped by self-interested parties.

The government further ensures that existing tenants are protected from cynical eviction and that, going forward, all tenanted pubs are rented on fair and realistic terms that allow for proper maintenance of the buildings, long-term security of tenure and sufficient margin to provide for a fair wage for all workers in both the pub and supply chain.

True operational independence on an individual level is the absolute key to unlocking the full potential of each and every pub, and with so few pubs now remaining this urgently needs to be delivered via uncompromising industry regulation to stamp out existing abuses and restrictive practices, backed up by lasting protections in planning and competition law, as well as tailored fiscal measures to simply make pubs a more affordable option for more people⁷.

Until we have a government that truly grasps this and embraces it as a positive and progressive social vision (and on evidence to date I am very far from optimistic) I am very much afraid we will see no meaningful change for UK pubs or independent breweries, with the sector remaining locked in the current, doom-laden reality of scenario one whereby the huge social, economic and cultural potential of our unique pub and beer sector continues to be needlessly and shamefully squandered.

Victoria: Thomas and Robert, what do you think? Are you pessimistic or optimistic?

⁷ I realise this will sound like an idealised scenario to many, and I fear it is one that is extremely unlikely to be allowed to happen in the wider industry on current evidence. However, in many ways I am simply describing the context of the pubs I run myself, which I strive, in the face of commercial headwinds and certain industry norms, to make accessible and affordable to all in our local community as a safe and welcoming place for the shared enjoyment of good quality products that are not widely available elsewhere in the area. It is very important to me that the pubs are each unique and idiosyncratic spaces that actively serve to bolster local community cohesion whilst still being a positive and inclusive venue for visitors. In essence I am referring to an underlying ethos of independence, quality and authenticity. They are “real pubs” with a genuine local identity but welcoming to all.

I am proud to maximise my support for local independent suppliers, and our customers are hugely appreciative of the product range and service we offer. We are neither the most expensive pubs locally nor the cheapest, but we ensure that all our staff receive a proper living wage (we are Living Wage Foundation accredited) and that our independent suppliers all receive the price they need in turn. Economically and socially I feel our pubs are an entirely positive force.

Visitors to our pubs are consistently impressed with our offering and express surprise at the range of independent drinks we offer while remaining a genuine pub. They are often moved to tell us that they used to have a beloved pub in their own area and wish they still had.

I have the freedom to run our three pubs the way I do because we are entirely independent of corporate influence (other than paying an excessive rent to a corporate owner in our one rented site).

Thomas & Robert: The future is probably one of ongoing adversity and even more diversification. While the ideal of 'the Great British Pub' retains a huge amount of cultural visibility and the ongoing loss of pubs rightly evokes strong emotions and call to action, there will be far more diversity in an already heterogeneous sector than a lot of public debates seem willing to accept. So, a contraction in terms of numbers is likely but there is already and will be more innovation, both out of strategic necessity and out of a willingness to reimagine what a pub can be or needs to be to thrive.

To go back to our first answer regarding costs, pubs must squeeze every moment from the day, and this might accelerate the hybridisation already seen in recent years. Venues that combine the best features of pubs (let's say that good beer and a welcoming convivial atmosphere are givens!) with elements of cafes, workspaces, craft beer taprooms, cultural venues like independent cinemas and community activities like Meetup groups and running clubs. For many venues a food offering will continue to be important – while the overall number of licensed venues in Britain declined by more than 30% between 2003 and 2023, the number of eating venues with alcohol licenses increased by nearly 15%. That said, there are many successful examples of 'micropubs' offering a more 'back to basics', drinks-led pub offer, underlining the point that there are different ways to run a successful pub. Community ownership may also increase. It is by no means a panacea, but the fantastic examples of reviving interest in and commitment to the virtues of a pub being the hub of its community through communities working together to purchase a local pub. Freeing a pub from a pubco or developer is often a tricky task though, and greater protection and support for such campaigns can become an important signal that authorities and government value community pubs.

As much as we like to re-read classics like the Mass Observation's study of the pub as the focal point of community life in 'Worktown' (i.e. Bolton in the 1930s), or Orwell's love letter to the subtle beauty of the 'perfect pub', there is a feeling that pub going is no longer the 'mass' leisure activity it was. If more and more people lack the means or the desire to spend scarce resources (money, obviously, but we could add time as a resource people increasingly feel short of) on an evening in the pub, the whole sector must adjust how it views itself and how it engages with and fosters a viable customer base.

Victoria: Kelly and Bob, what do you think? How do you see the future for breweries, and especially independent breweries?

Kelly & Bob: We feel that for most breweries there will largely be no change in future. The international breweries will continue to sell large volumes of cheaply produced beer into tied pubs and supermarkets. This is a game of resources, and those companies have deep pockets and a huge infrastructure in place. It will be interesting to see which brands rise and fall (the introduction and popularity of Madri for example), but given they are all brewed by the same relatively small group of companies it will make little difference to the structure of the market.

The regional traditional breweries (or "family brewers" as they style themselves) will continue to compete with each other within supermarkets, and continue to expand their estates of pubs. These will be tied houses to sell the brewery's products only but, as they are usually/often

bought in tranches from existing pubcos who are closed to independent breweries anyway, this won't affect the structure of the market as much as the share of ownership.

Smaller independent breweries will increasingly find they hit a ceiling. With the increase in duty rates brought in following lobbying from the "family brewers" (last August, see <https://goodchemistrybrewing.co.uk/blogs/blog/small-brewers-duty-relief> if any of you aren't familiar with what this is), costs have risen proportionately quicker than for larger breweries. These smaller breweries have tried to grow, but the independent market has not grown, resulting in an over-supply of brewing capacity within these breweries. This is resulting in discounting amongst those breweries in order to outcompete each other (as mentioned in our response to the first question above). Unfortunately, this is leading to reduced profitability and breweries choosing to, or being forced to, close.

The range of beer styles being produced is already contracting as pubs are less willing to take a chance on something not selling or not selling quickly enough. As this variety and experimentation declines, there is likely to be greater focus on the price of one beer versus another, and less variety on the bar.

However, as the barriers to growth (through cost of expansion and access to market) become more prominent, we think we will see more breweries contract to more of a brewpub model assisted with sales to a very local market. There is an opportunity for taprooms or brewery-owned micropubs to take the place of lost pubs. Ownership of the point of supply at a very small scale will give security to the brewery and may also allow them to build creativity back into the beers they brew.

Just reflecting over the last two answers here, but it feels like the purpose of the pub is remaining while the physical properties of the pub may be changing. It seems realistic that the need for a pub is the need for a place for people to meet and to build community. Unfortunately, due to the monopolisation of traditional pub buildings by pubcos, these are becoming less available to people in communities and becoming less community-focussed when they're run by large pubcos that aren't involved or invested in the local community, nor potentially run by people who care or are involved or invested in the local community. So the repurposing of other premises, likely smaller in scale, is how communities will be able to achieve a pub environment to suit their needs. Also, we have noticed that we regularly go to our local micropub when we are not even particularly keen for a drink. But it's an opportunity for us to be in the presence of familiar people in a nice environment, to get out of the house, and do something other than sit in front of the TV! This shows that the function of a pub is just as relevant and necessary now, as it has been in the past. Particularly as people begin to see the benefit in disconnecting from a digital environment

Overall, however, the picture is fairly depressing! It feels like the creative growth of "craft" and the disruption to the market has now largely been undermined and replaced by the big brewers. The points of difference that craft brewers had – new flavours, fresh branding, new experiences – have been replicated at a lower price point, and in more convenient locations. The thing that smaller breweries can compete on is being local, but that necessitates remaining small.

All of the questions asked suggest complicated, nuanced, multi-angle answers, for a range of reasons – the “pub and beer industry” isn’t one thing, for a start, and even within “independent craft beer” there are so many different businesses it’s hard to be able to pin down one particular angle to answer from.

Thomas and Robert: This is very important. There's almost a somewhat counter-intuitive need to give up on the still generally celebrated idea of 'the Great British Pub', when the sector itself is so heterogeneous in its makeup and character, and so diverse the challenges faced, and the support needed, as the above conversation so frequently highlighted. At all levels, from customers to operators to national government, improving recognition of pubs and breweries of all shapes and sizes and - let's be honest - some contribute far more to local communities than others.

Kelly and Bob: So what we've done, while talking through these questions, our responses, and our responses to everyone else's answers, is to think about things from our own specific perspective within the “pub and beer industry” as a whole – but/so that means we definitely don't offer “the brewers” perspective. The other thing is, we feel we could write for days with various thoughts about the industry, where it's come from, where it might be going, what could prevent it being worse and make it any better, but we've tried to keep it brief and to the point. I hope there's been enough to give everyone else some food for thought. Thanks for having us as part of this, and we look forward to hearing what others' thoughts on the future are!

Victoria: Thank you all for your detailed answers and for taking part in this pint-sized conversation!

We hope you've found the conversation both interesting and useful. Beer, brewing and drinking spaces continue to be researched by people across the world but we hope that this conversation shows that much more can be done, avenues have not yet been taken and there are many areas that have potential for significant contribution both academically and practically. From a management and political science disciplinary perspective aspects such as the market structure of pubs, large corporate pub companies fighting against and competing with independents and the political will to change this is ripe ground for analysis for researchers. The legal and political perspective of the beer tie also warrants investigation due to its restrictive and anti-competitive nature (If you're interested in this perspective look at Jed Meer's excellent work in this area - e.g. Meers, 2020, 2023, etc.). From the perspective of consumers, the role of the pub as a hub has been vocalised many times (Andrews and Turner, 2012) and here we can see how this value develops, is maintained and can break down is highlighted as particularly important. From a cultural heritage, history, town and city planning and architecture perspective the housing of drinking spaces in historic, and modern (taprooms, etc.) spaces, how these add to the value and consumer experience is also worth exploration, especially in how planning policies and procedures can affect their maintenance and support. And finally, returning to the focus of this journal, how these issues are communicated and marketed, to whom and when to ensure the survival of these important social and community spaces seems to me a good way to spend some time as a researcher.

Biographies

Good Chemistry Brewing was set up by *Bob Cary* and *Kelly Sidgwick* to create good chemistry in its broadest sense – not just in the quality of the beer they produce but using that to allow them to celebrate community and relationships across science, the arts, music, food, and social experiences, as well as beer & brewing. They have been up and running in their East Bristol brewery since 2015, opened their first pub, *The Good Measure*, in north Bristol in December 2018, and their second, the beautiful and historic *Kings Head*, in central Bristol in November 2022. In addition to serving Bristol drinkers on draught and in can, *Good Chemistry* is increasingly reaching further afield. All their beers are suitable for vegans.

Paul Crossman is a licensee and pub campaigner based in York. He runs three award-winning community-orientated cask ale pubs just outside the city centre. They are *The Swan*, *The Slip Inn* and *Volunteer Arms*. Paul is also a founder director of *The York Gin Company*, an independent multi-award-winning craft distillery. He was heavily involved in the campaigning that led to the introduction of the Pubs Code and has since given oral evidence to the Treasury Select Committee, as well as liaising directly with the Pubs Code Adjudicator, Government (BEIS) and contributing to the CAMRA Tenants Forum.

Thomas Thurnell-Read is Reader in Sociology at Loughborough University. He is an internationally recognised expert on the role of pubs and drinking culture in British society and is author of numerous articles and books, including *Intoxication: Self, state and society* (2023) and *Drinking Dilemmas: Space, culture and identity* (2015). Thomas is a founding member of the British Sociological Association's Alcohol Study Group and has presented his research to diverse audiences in the UK, Denmark, Portugal, France, Sweden, Japan and Taiwan. He has extensive experience of media engagement and public dissemination, and his research has featured in *The Observer*, *The Conversation*, *Vice.com*, *The Economist* and *The Morning Advertiser*, and on BBC Radio 4's *Thinking Allowed*.

Robert Deakin is a Post Doctoral Research Associate at Loughborough University. An anthropologist by training, his research is broadly concerned with people's experiences and responses to urban and social change, and how these both reflect and remake structural inequalities. His PhD explored the intersections of race and class inequality amid urban regeneration in Poplar, east London, drawing on 18 months' ethnographic research with social housing estate residents engaged with heritage projects (including a pub). He currently works with Dr Thomas Thurnell-Read on a two-year project exploring the causes and consequences of pub closure in the UK. Alongside publishing in *The British Journal of Sociology*, *Critique of Anthropology* and *Roadsides*, Robert has used filmmaking in research and dissemination: a 25-minute film *Jimmy's Archive*, codirected with a research participant, has been screened across academic conference, classroom and community settings.

Victoria Wells is Professor of Sustainable Management (Professor of Pubs) at the School for Business and Society at the University of York. Her career and research has focused on consumer behaviour and in particular how consumers react to their environment (in retail and service settings) or how in turn they affect their environment (through sustainable and ethical consumption). Her current work focuses on pubs, from the perspective of the consumer and she has written about pub location, pub choice, consumer co-operative pubs and no and low alcohol consumption. She runs the University of York MOOC "Pubs: History, Consumers,

Management, and Protection” and her work has been featured in the *Daily Star*, the *Yorkshire Post* and the *Morning Advertiser*.

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