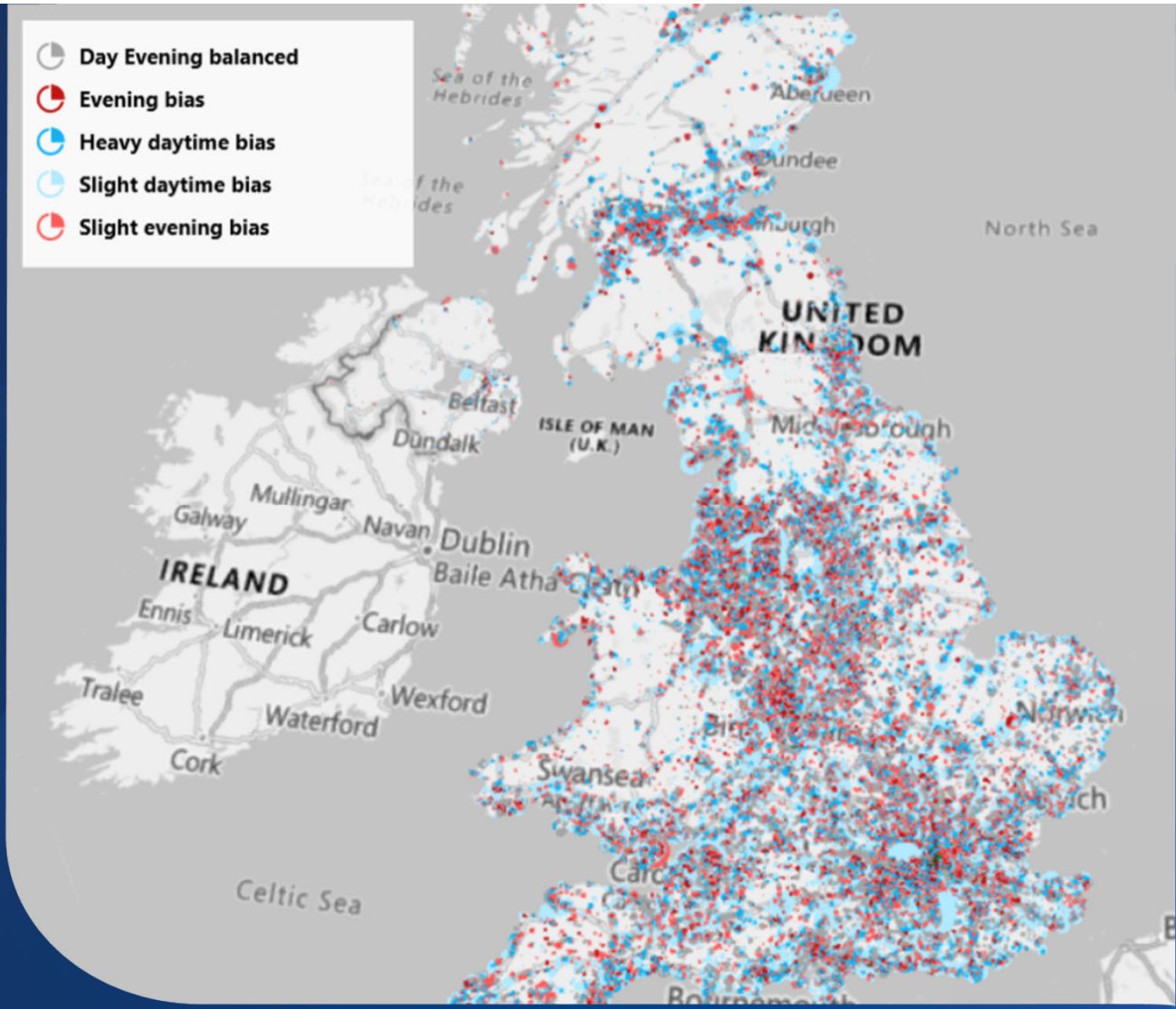
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UNDERSTANDING TODAY'S PUB CONSUMER

Mark Bentley,
Business Development Director



TWO MARKET LEADERS, UNDERPINNED BY PIONEERING DATA.



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INTELLIGENCE X ACTIVATION.

Billions of real-world transactions and contextual insights unlock how hospitality brands attract, engage, and retain guests at every moment of spend.

10.2M Uniquely identifiable customers

160K Hospitality venues and 40k grocery & convenience stores

21K Site Level F&B Pricing (>100 brands)

INTELLIGENCE → ACTIVATION

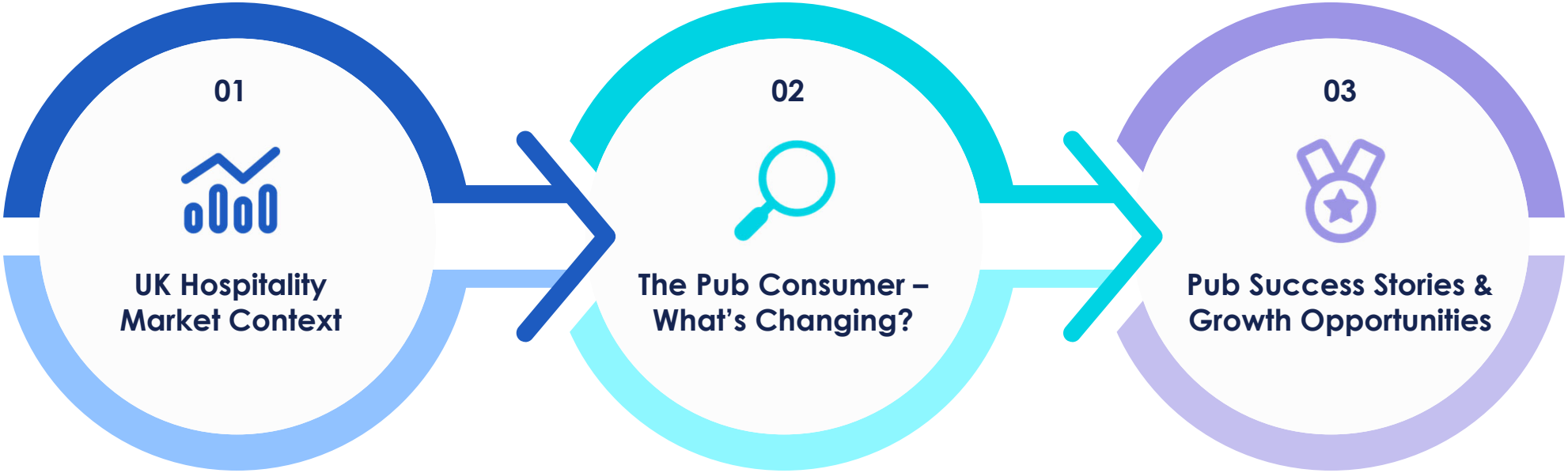
WHAT THIS DELIVERS FOR HOSPITALITY BRANDS

- Understand customers better
- Optimise performance
- Unlock growth
- Prove ROI

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KEY FOCUS AREAS.



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1. UK HOSPITALITY MARKET CONTEXT.



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PUBS AND BARS IN NUMBERS

Last 26 Weeks YoY Performance Headlines…

44%

OF PUBS & BARS IN GROWTH

Best performers (> +10% YoY) are more likely to be…

VALUE

Venues in our Value segment, typically associated with more accessible pricing and stronger value perception.

+8pp

HIGH FREQUENCY

Venues where customers visit more often than average, driving stronger repeat visitation.

+8pp

LOCALS

Venues that attract a high proportion of spend from people living nearby.

+5pp

RURAL

Venues located in rural areas rather than High Street, city centre, or suburban locations.

+2pp

AVG. WEEKPART

Venues with a balanced sales profile across the week, without a strong weekday or weekend skew.

+2pp

THE STRONGEST GROWTH COMES FROM VENUES WITH THESE CHARACTERISTICS

Source: Reward Site Universe data to 1/4/26 – headline Stats for Last 26 Weeks YoY Sales Growth for cohort of 33,242 UK Pubs & Bars (Active Traders, 50+ Weeks Sales).

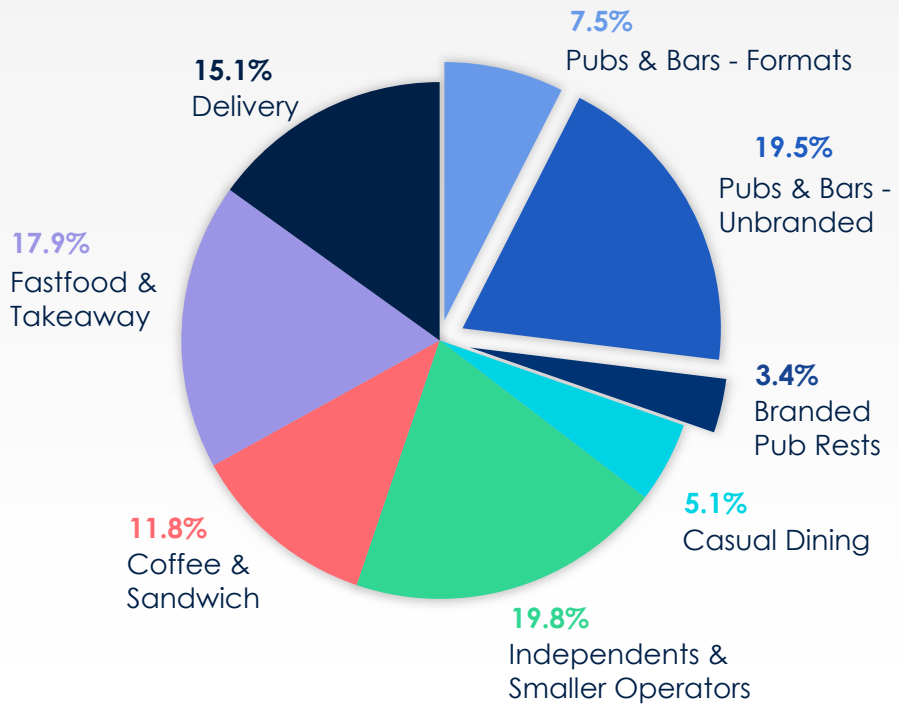
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UK HOSPITALITY MARKET SNAPSHOT.

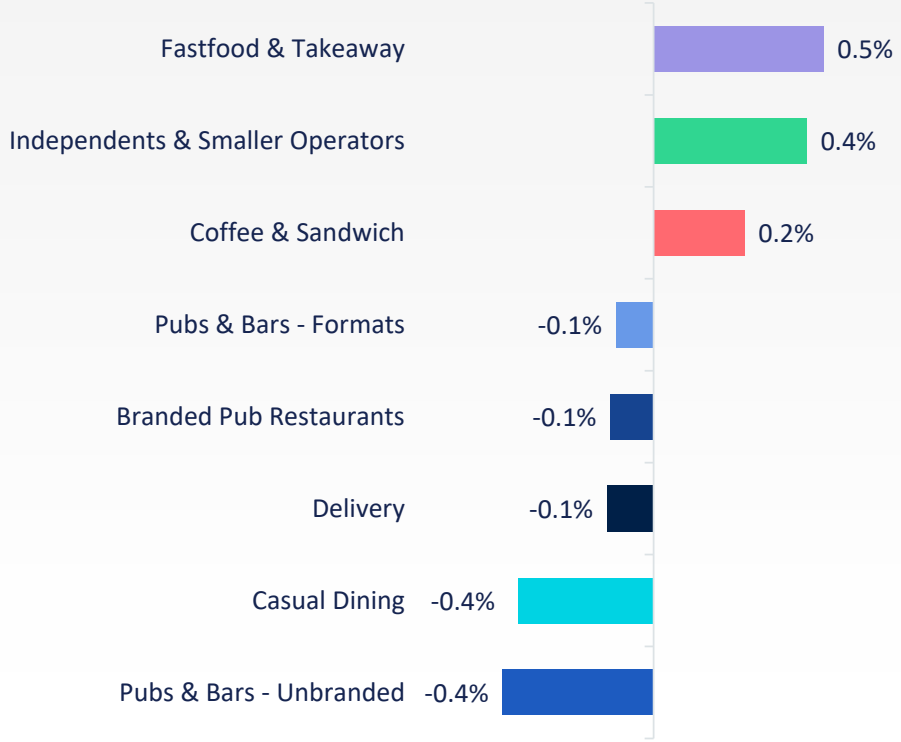
Over the last two years, Fastfood & Takeaway and Independents & Smaller Operators are the best performing sectors.

UK HOSPITALITY BREAKDOWN

Customer Share of Wallet



SHARE OF WALLET CHANGE VS. LAST YEAR



Source: Reward Panel - Customer Share of Wallet by Sector of UK Hospitality, 52 weeks ending 21/4/26 and % change year on year.

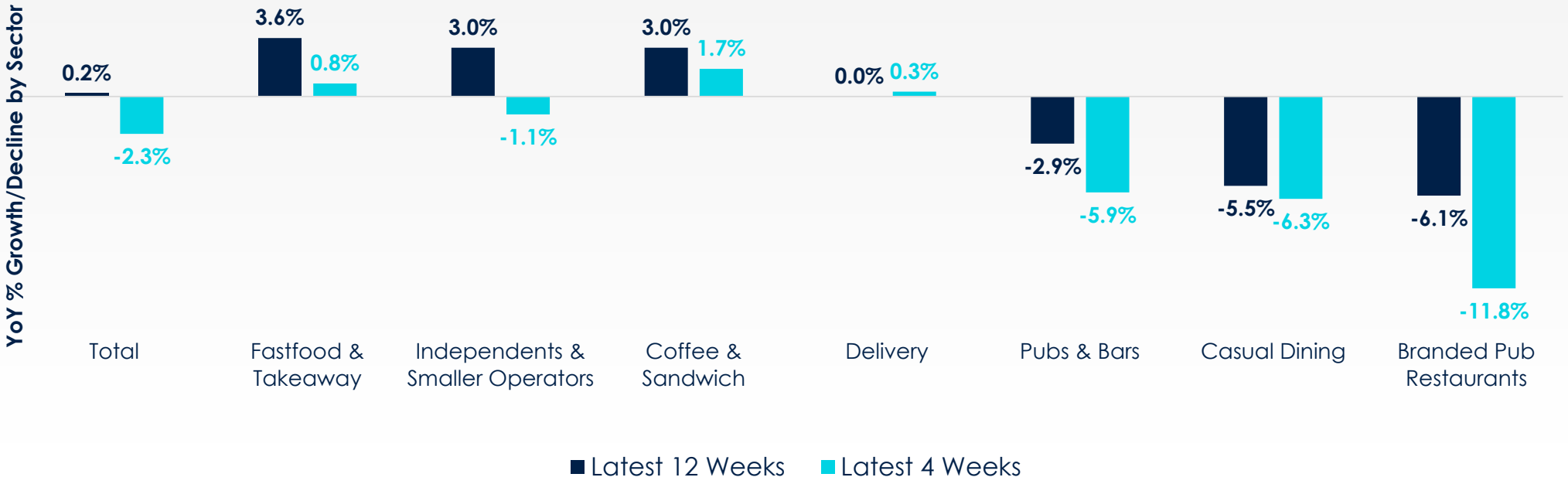
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LATEST UK HOSPITALITY MARKET PERFORMANCE BY SECTOR.

UK Hospitality sales grew +0.2% year-on-year over the 12 weeks to 21/4/26, with performance declining to -2.3% in the latest 4 weeks. The Pubs & Bars sector is seeing declining sales across all time periods.

UK Hospitality Performance by Sector – Latest 12 & 4 Weeks YoY Growth/Decline



Source: Reward Panel, Total UK Hospitality Spend £ by Sector, YoY % Growth/Decline, 12 and 4 weeks ending 21/4/26.

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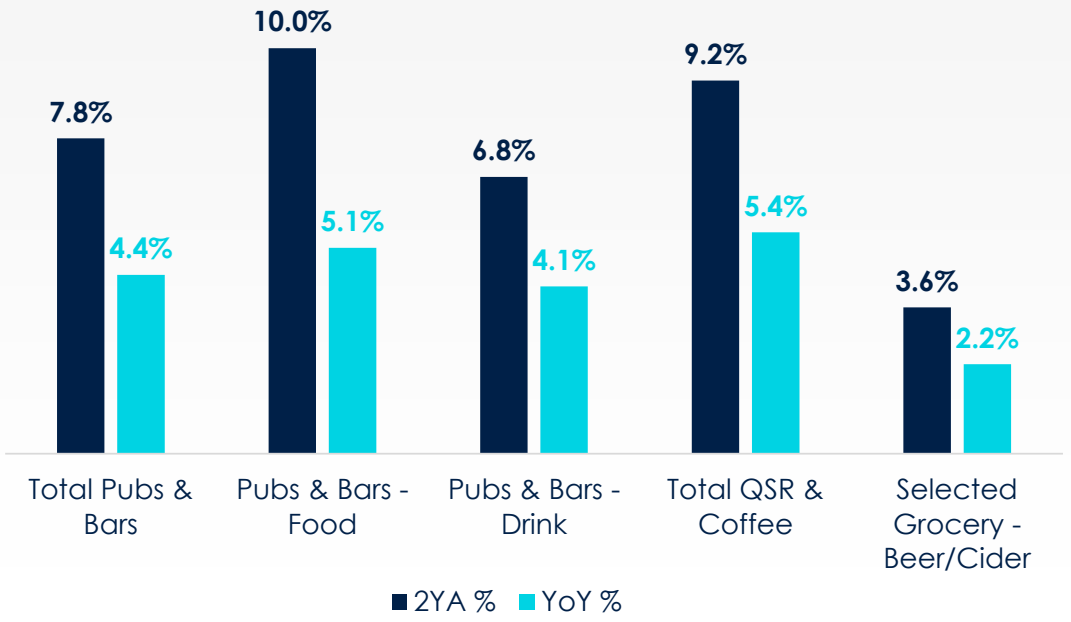
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LATEST MARKET PRICE INFLATION.

Inflation across the UK Hospitality sector continues to run ahead of market growth, and ahead of CPI inflation more broadly. Looking at selected drinks categories in Grocery, we can also see the differential widening versus At Home occasions.

% PRICE INFLATION IN UK MANAGED PUBS & BARS, QSR & COFFEE AND GROCERY

YOY % Change



Source: Reward Pricing Databases - Pubs & Bars data to 1/4/26, QSR & Coffee data to 23/4/26 and Grocery data to 1/4/26.
Reward Market Price Inflation Tracker covers c.7k Managed Pubs & Bars, 14k QSR & Coffee Shops and selected Grocery categories.

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2. THE PUB CONSUMER – WHAT'S CHANGING?

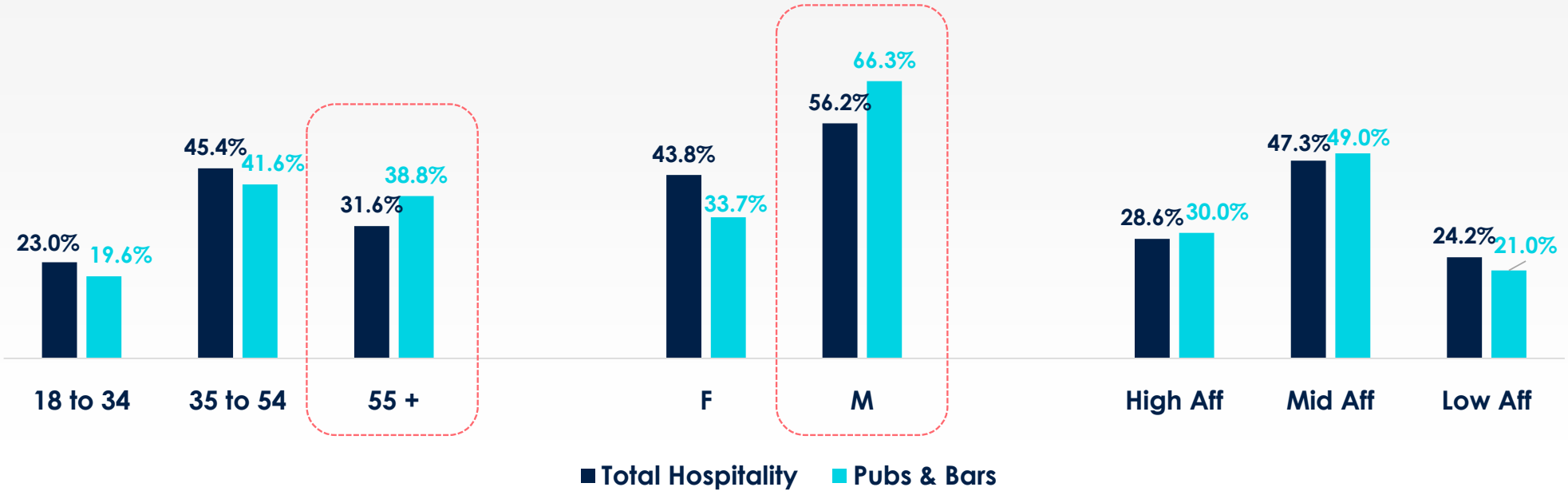


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WHO IS THE UK PUBS & BARS CUSTOMER?

Relative to UK Hospitality overall, the UK Pubs & Bars customer profile is noticeably more Male (+10.1% points) and older (+7.2% points more spend from customers aged 55+).

PUBS & BARS VS. TOTAL UK HOSPITALITY
Customer Profiles by Spend %



Source: Reward Panel – Pubs & Bars vs. Total UK Hospitality Spend Mix by Key Demographics, 52 weeks ending 21/4/26.

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HOW IS THE UK PUBS & BARS CUSTOMER PROFILE CHANGING?

Pubs & Bars are losing out to younger audiences, driven by declining visit frequency.



Source: Reward Panel – Pubs & Bars Spend Mix by Key Demographics, 52 weeks ending 21/4/26 and Year on Year % Change.

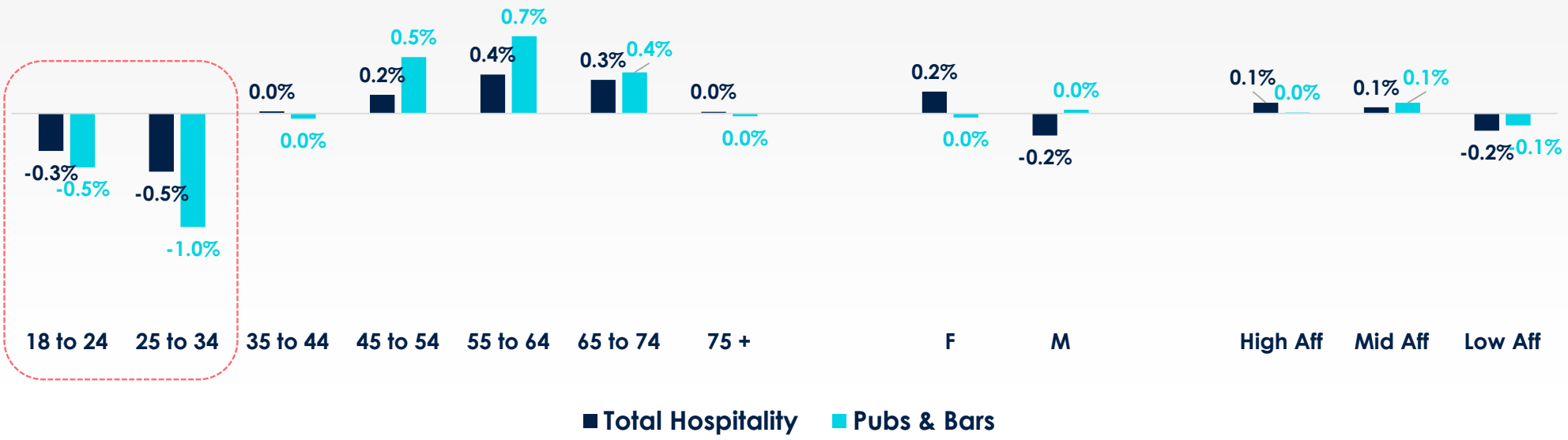
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WHAT IS DRIVING THE SHIFTS IN PUBS & BARS SPEND?

Pubs are Bars are losing share of spend from 18-34's, more so than UK Hospitality overall.
The sector is becoming more reliant on customers aged 45 to 74.

PUBS & BARS VS. TOTAL UK HOSPITALITY

YoY % Spend Mix Change



Source: Reward Panel – Pubs & Bars vs. Total UK Hospitality, YoY % Spend Mix Change, 52 weeks ending 21/4/26.

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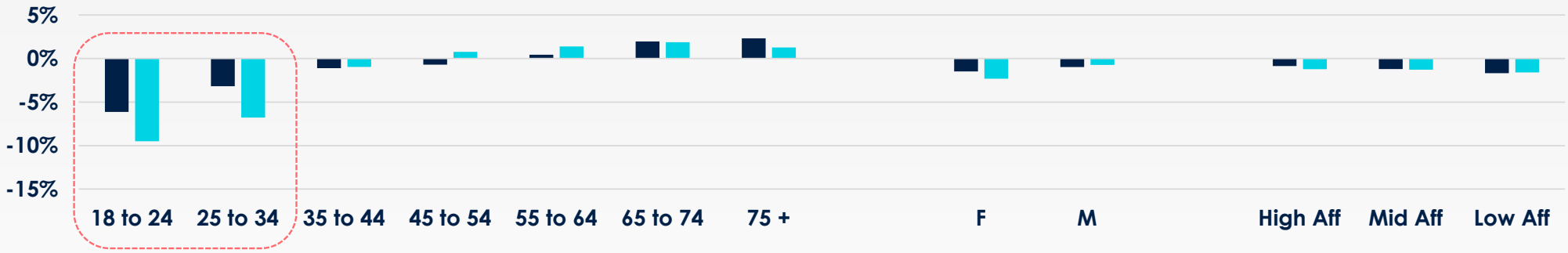
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WHAT IS DRIVING THE SHIFTS IN PUBS & BARS SPEND?

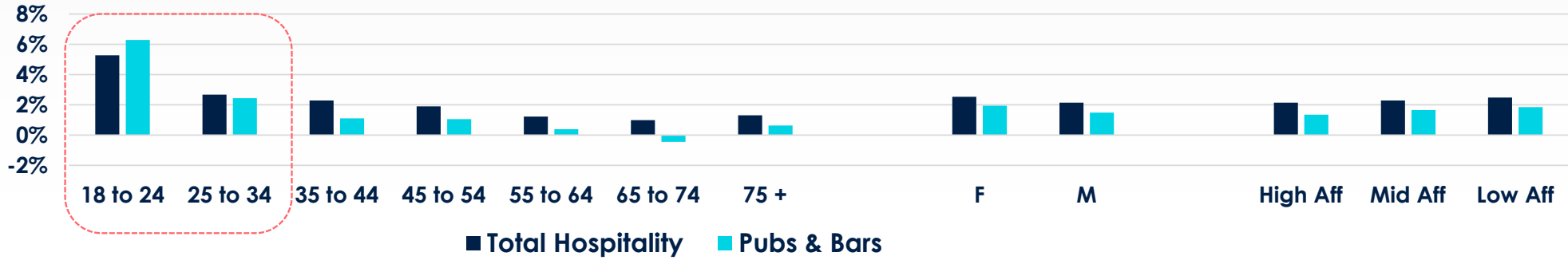
Declining visit frequency is the key challenge, especially for 18-34's – spending more per transaction, but visiting less frequently:

UK PUBS & BARS KPI'S

YOY % Change in Frequency



YOY % Change in Average Transaction Values (ATV)



Source: Reward Panel, Pubs & Bars vs. Total UK Hospitality,
Sources of £ Change – 52 weeks ending 21/4/26 versus previous year.

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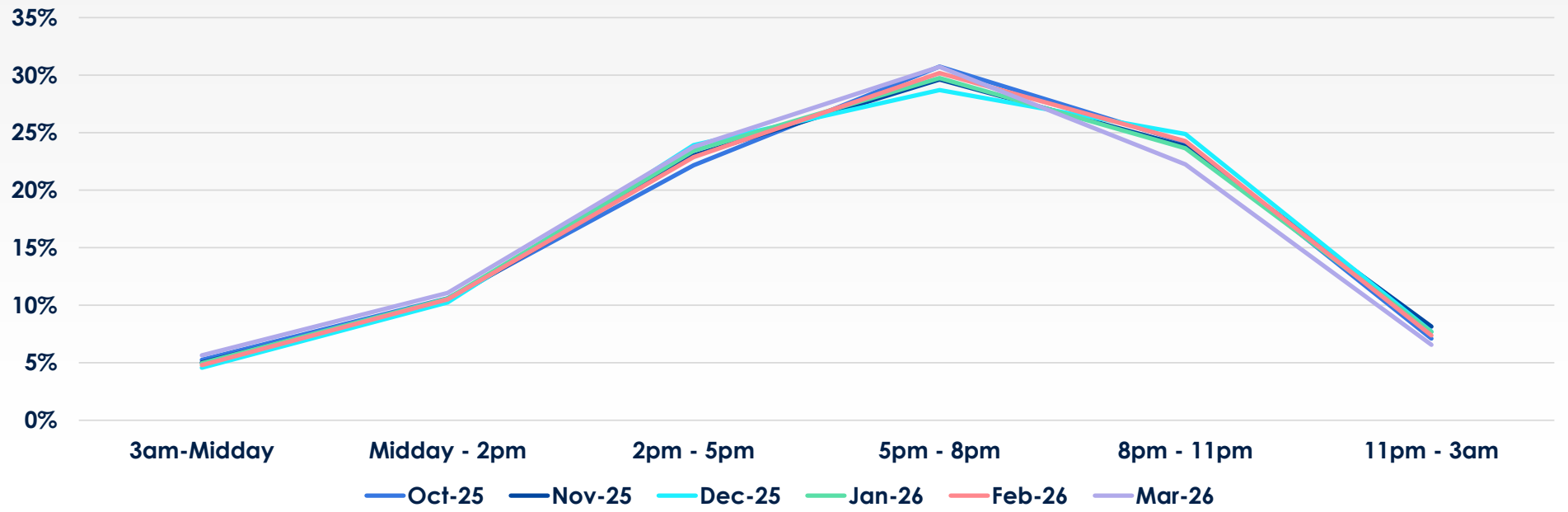
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WHEN ARE THEY SPENDING?

5-8pm is the key trading period for Pubs & Bars, averaging around 30% of all sales.
This trading period will become increasingly important as we head towards the Summer months.

PUBS & BARS SPEND BY DAYPART

Spend Mix By Time of Day – 6 Months Ending March 2026



Source: Reward Panel – Pubs & Bars Spend Mix by Time of Day.
Monthly data for the 6 months ending 31/3/26.

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WHEN ARE THEY SPENDING?

Recent data shows post 5pm occasions growing in importance. In March 2026, post 5pm occasions accounted for 59.5% of Pubs & Bars spend (+2.5pp year on year).



Source: Reward Panel – Pubs & Bars Spend Mix by Key Demographics, 52 weeks ending 21/4/26 and Year on Year % Change.

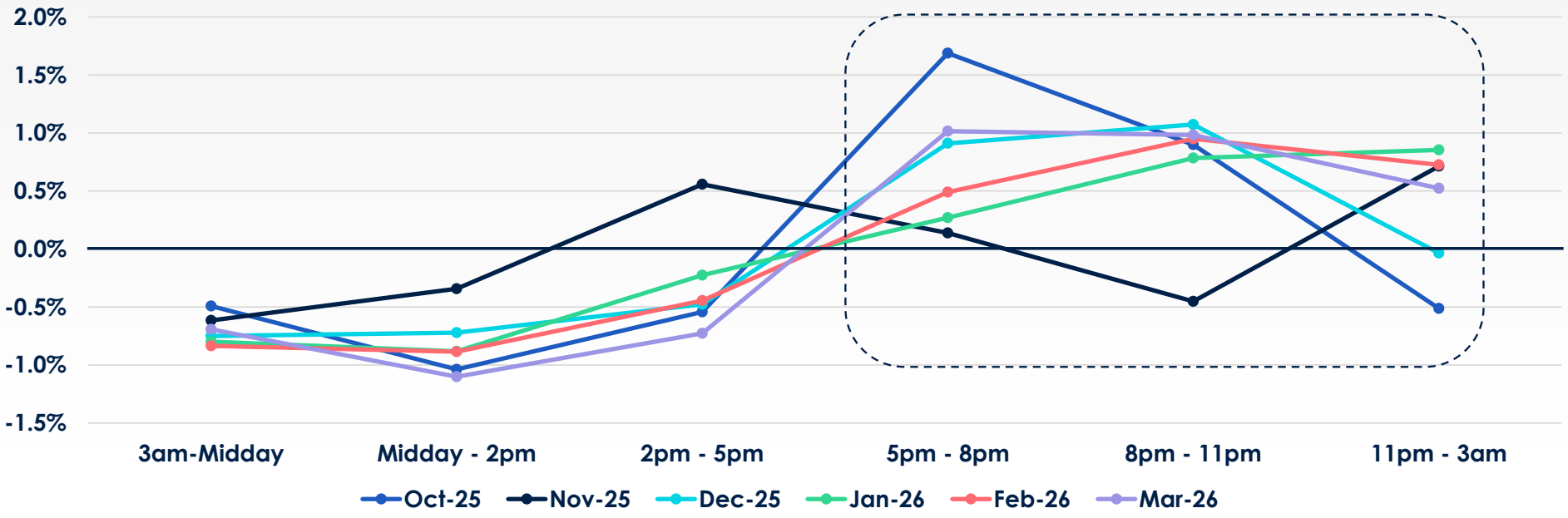
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WHEN ARE THEY SPENDING?

Small shifts, indicating potential signs of "green shoots" for the Late-Night Sector.

PUBS & BARS SPEND BY DAYPART

Year on Year % Change in Sales Mix – 6 Months Ending March 2026



Source: Reward Panel – Pubs & Bars Spend Mix by Time of Day.
Year on Year % Change in Sales Mix for the 6 months ending 31/3/26.

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3. PUB SUCCESS STORIES & GROWTH OPPORTUNITIES.



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CRITICAL SUCCESS FACTORS.

The following characteristics will increasingly define the most successful operators across UK Hospitality sector:



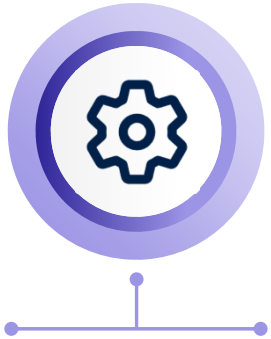
UNDERSTANDING THEIR CUSTOMERS



CLEAR & COMPELLING BRAND PROPOSITIONS



UNDERSTANDING THEIR COMPETITORS



CONSISTENCY IN EXECUTION



UNDERSTANDING THEIR LOCAL MARKETS

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PUB & BAR SUCCESS STORIES.

A few notable success stories across the UK include:





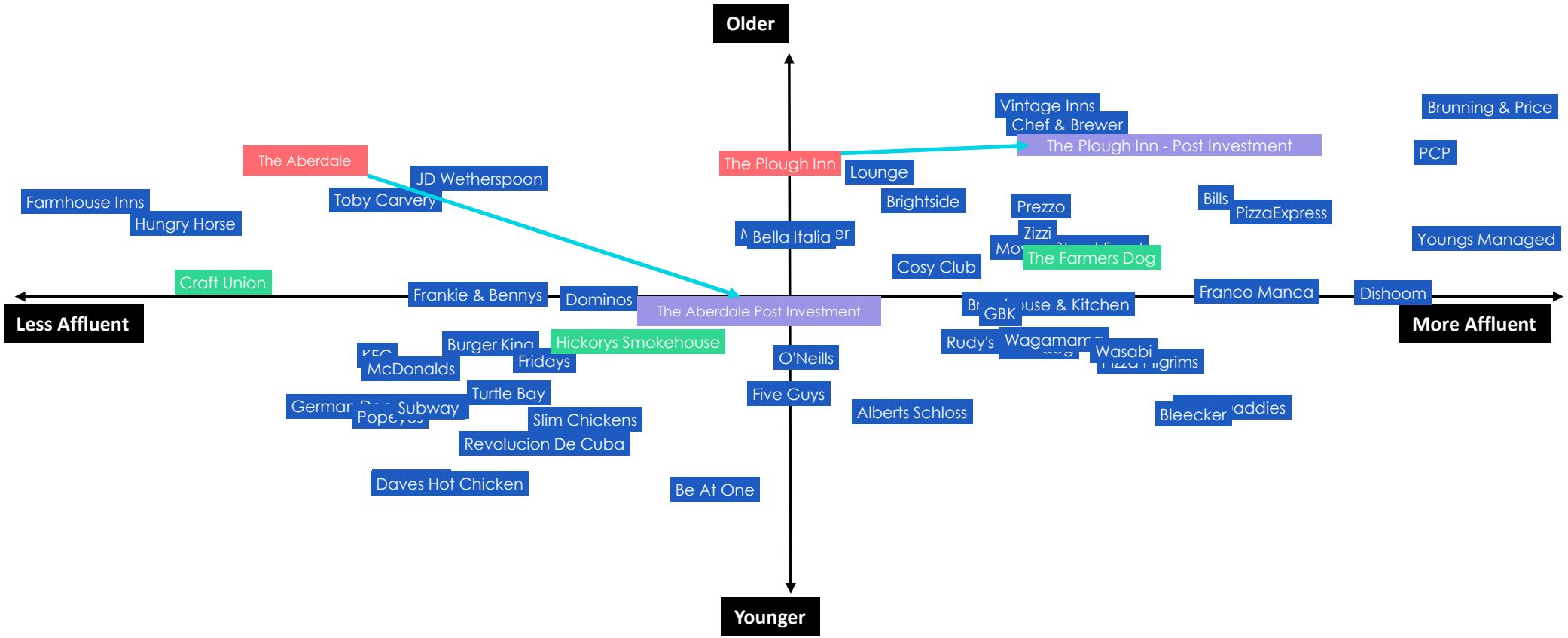




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AGE /AFFLUENCE – SELECTED FORMATS.

Using our card spending data, we can provide insights on individual businesses, including their customer profiles.
It's interesting to note that the 5 x "Pub & Bar Success Stories" are all in very different positions on this map.



Source: Reward Site Universe data 52 weeks ending 1/4/26 – Age/Affluence Profile of Selected Formats / Sites.

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FOCUS ON THE FARMER'S DOG – SITE SUMMARY

5 miles | 281 Chains | 30/04/2025 - 22/04/2026

Farmers Dog Pub OX184HJ

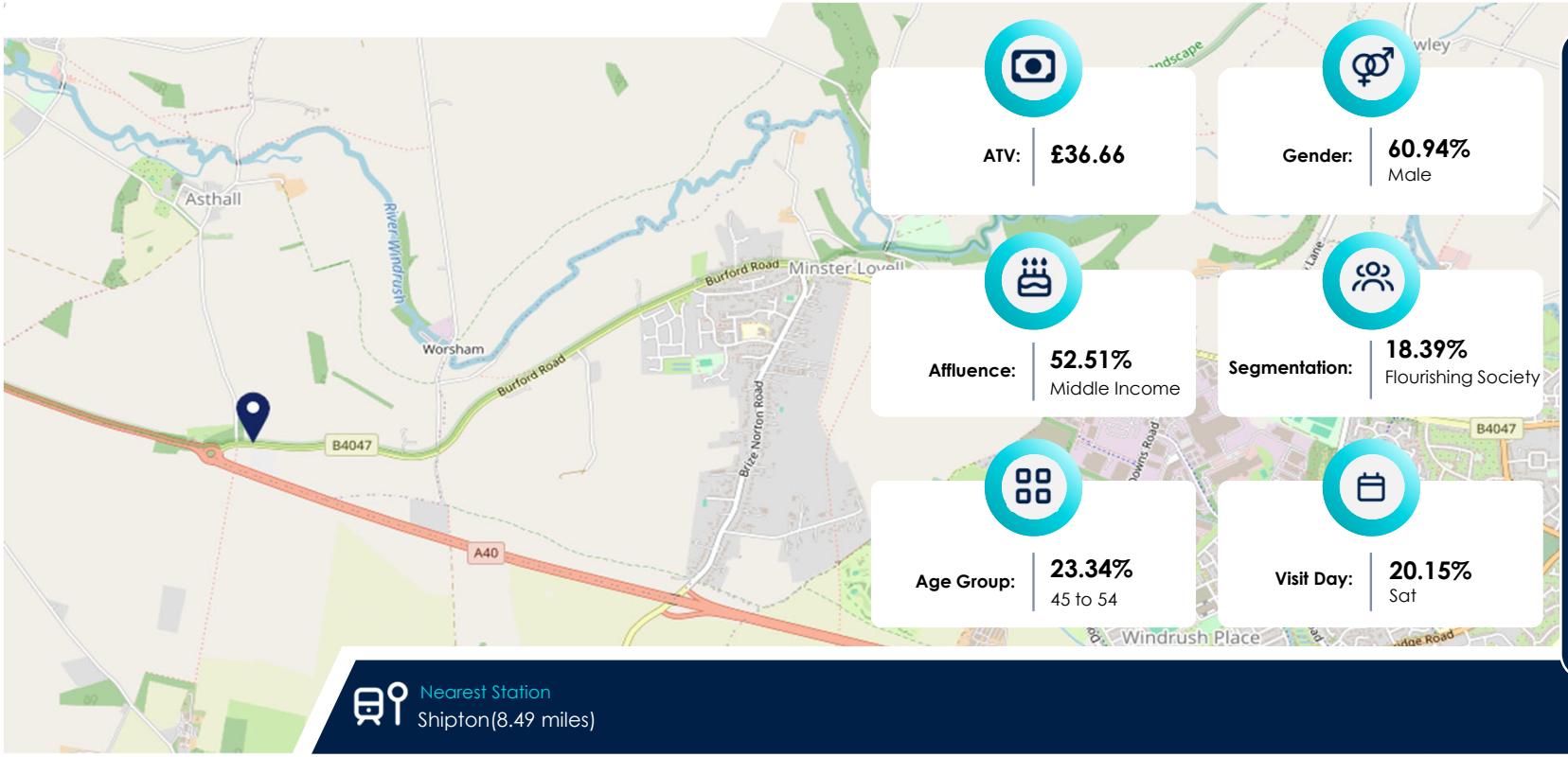
OX184HJ | Pub / Bar | Site Intel | Farmers Dog Pub OX184HJ

Work Area **Oxford**

Region **South East**

TV Region **Central**

Urbanicity **Rural village**



ATV: £36.66

Gender: 60.94% Male

Affluence: 52.51% Middle Income

Segmentation: 18.39% Flourishing Society

Age Group: 23.34% 45 to 54

Visit Day: 20.15% Sat

TOP COMPETITORS

01 Golden Eagle (Carterton)
OX183HQ
GK Proper Locals

02 The Beehive
OX183HA
Butcombe Group - Managed UK

03 The Prince Of Burford
OX184HX
Butcombe Group - Managed UK

Nearest Station
Shipton(8.49 miles)

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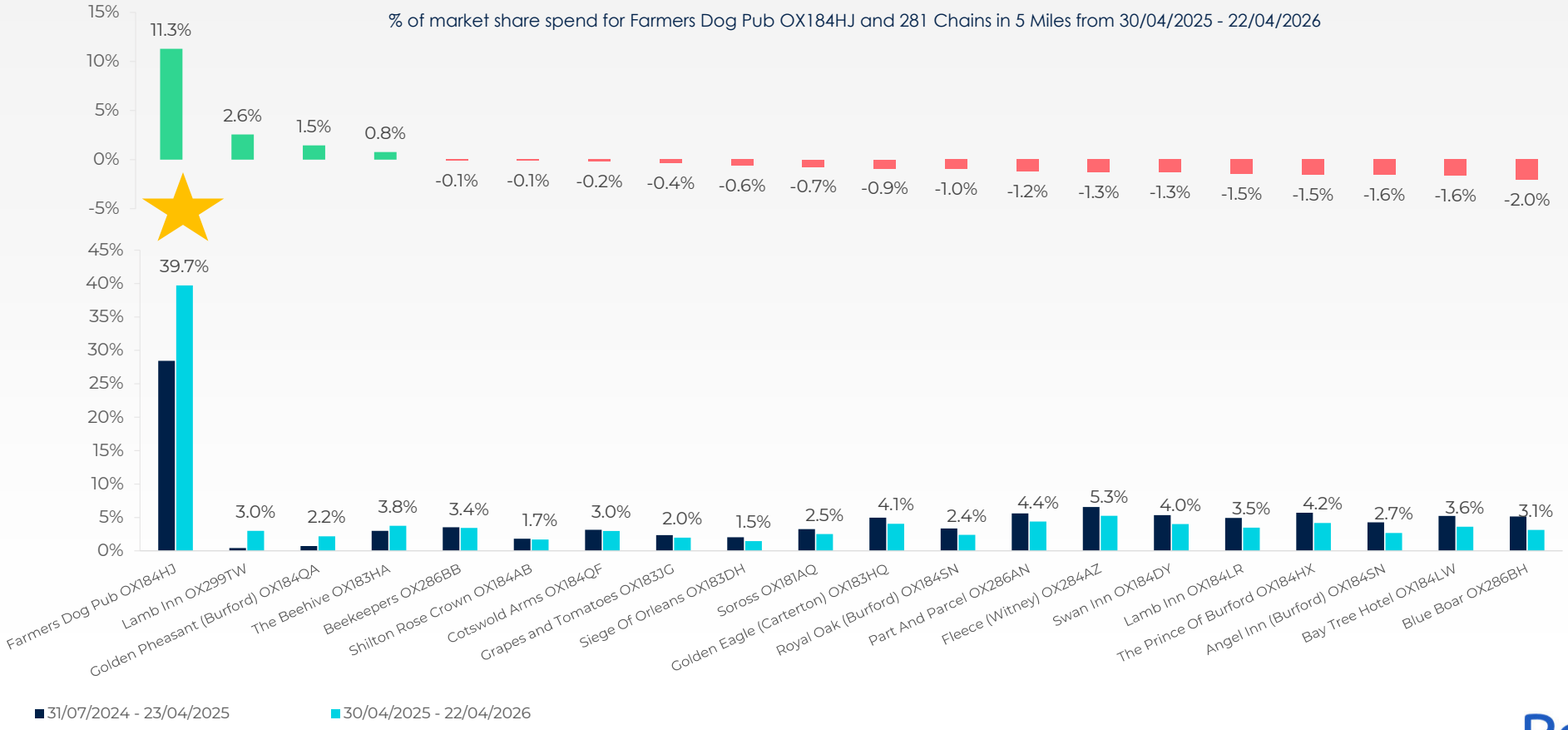
MARKET SHARE CHANGE

5 miles | 281 Chains | 30/04/2025 - 22/04/2026

Farmers Dog Pub OX184HJ | Site intel

How has market share changed between two date ranges?

% of market share spend for Farmers Dog Pub OX184HJ and 281 Chains in 5 Miles from 30/04/2025 - 22/04/2026



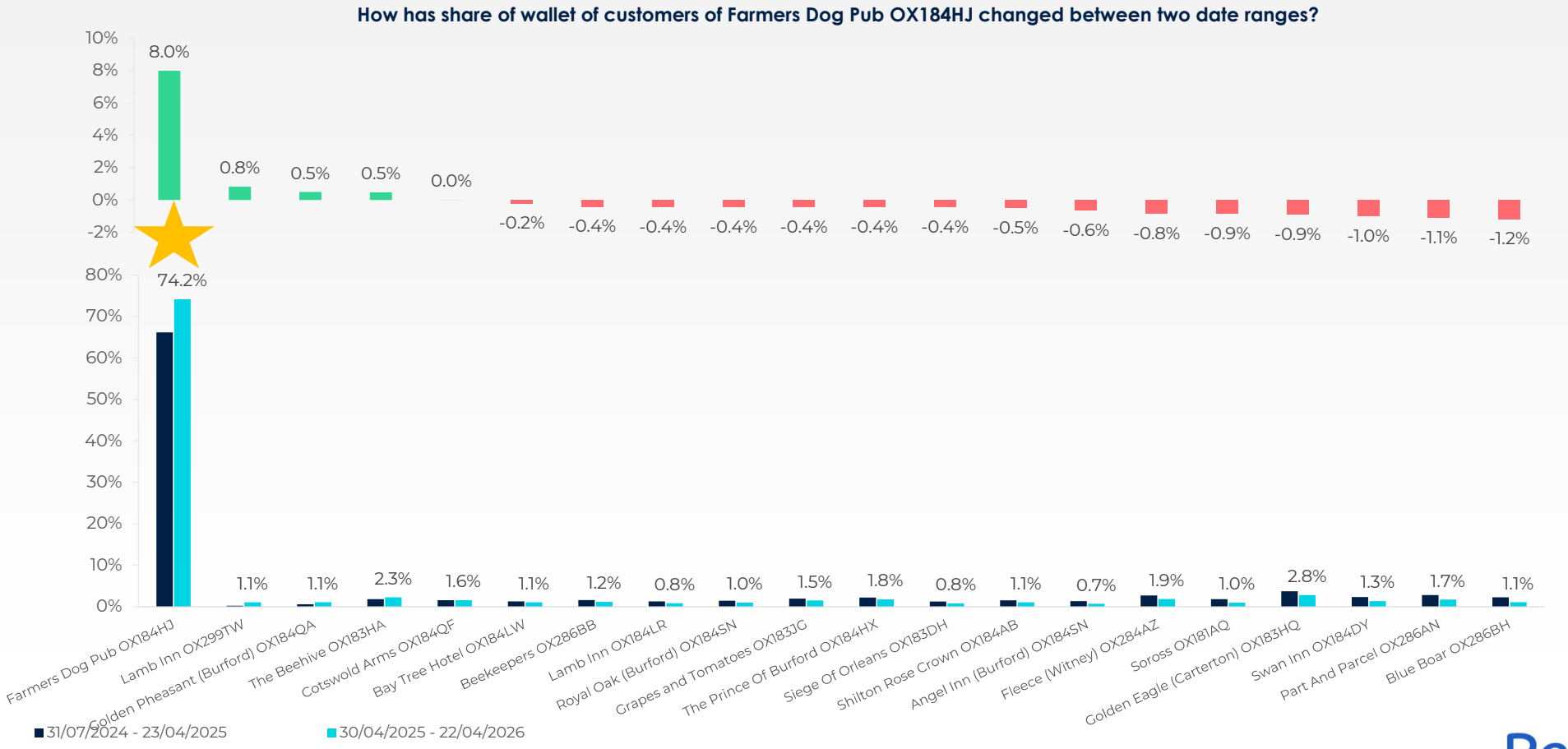
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SHARE OF WALLET CHANGE

5 miles | 281 Chains | 30/04/2025 - 22/04/2026

Farmers Dog Pub OX184HJ | Site intel



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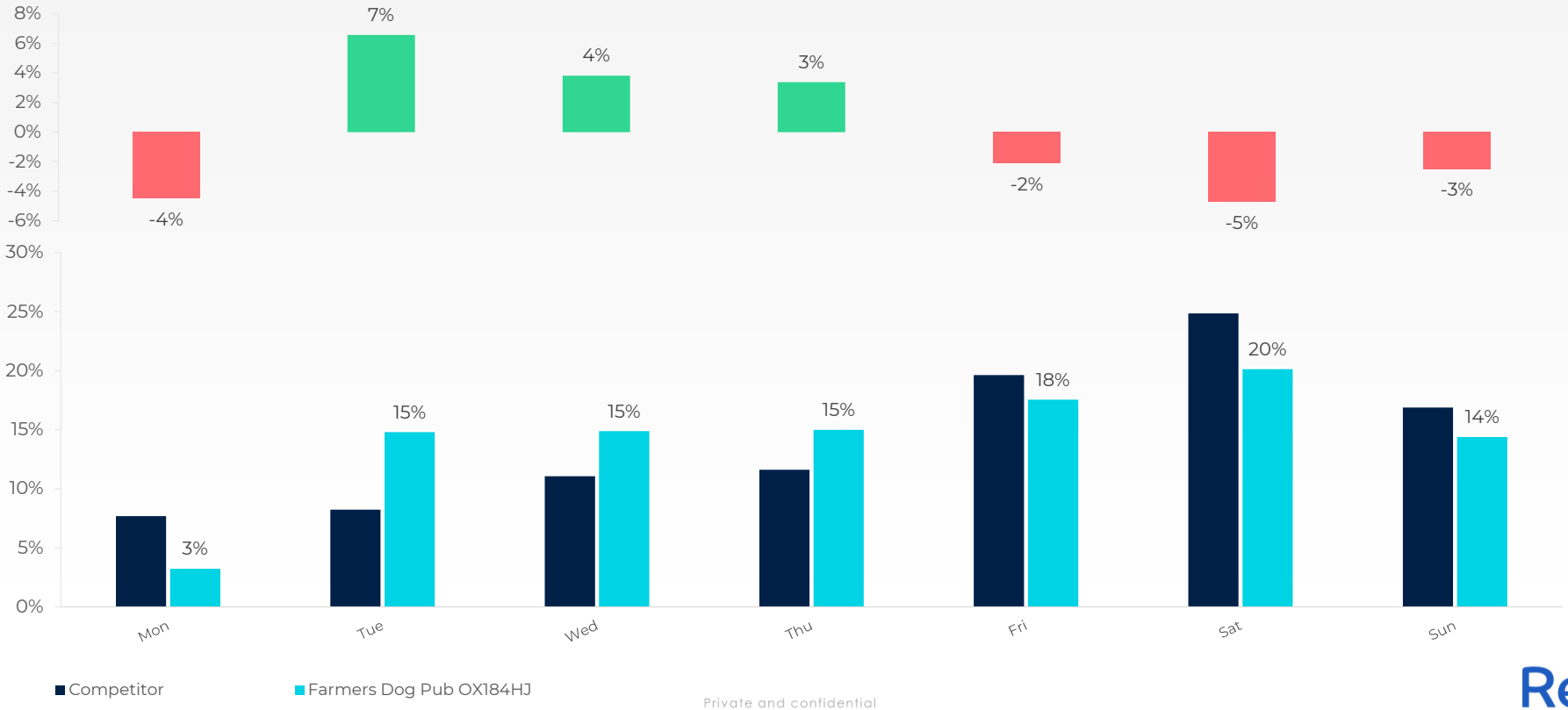
SPEND BY WEEKPART

5 miles | 281 Chains | 30/04/2025 - 22/04/2026

Farmers Dog Pub OX184HJ | Site intel

How is customer spend distributed throughout the week for Farmers Dog Pub OX184HJ versus its competitors?

% of spend for Farmers Dog Pub OX184HJ and 281 Chains in 5 Miles from 30/04/2025 - 22/04/2026 split by Day of Week



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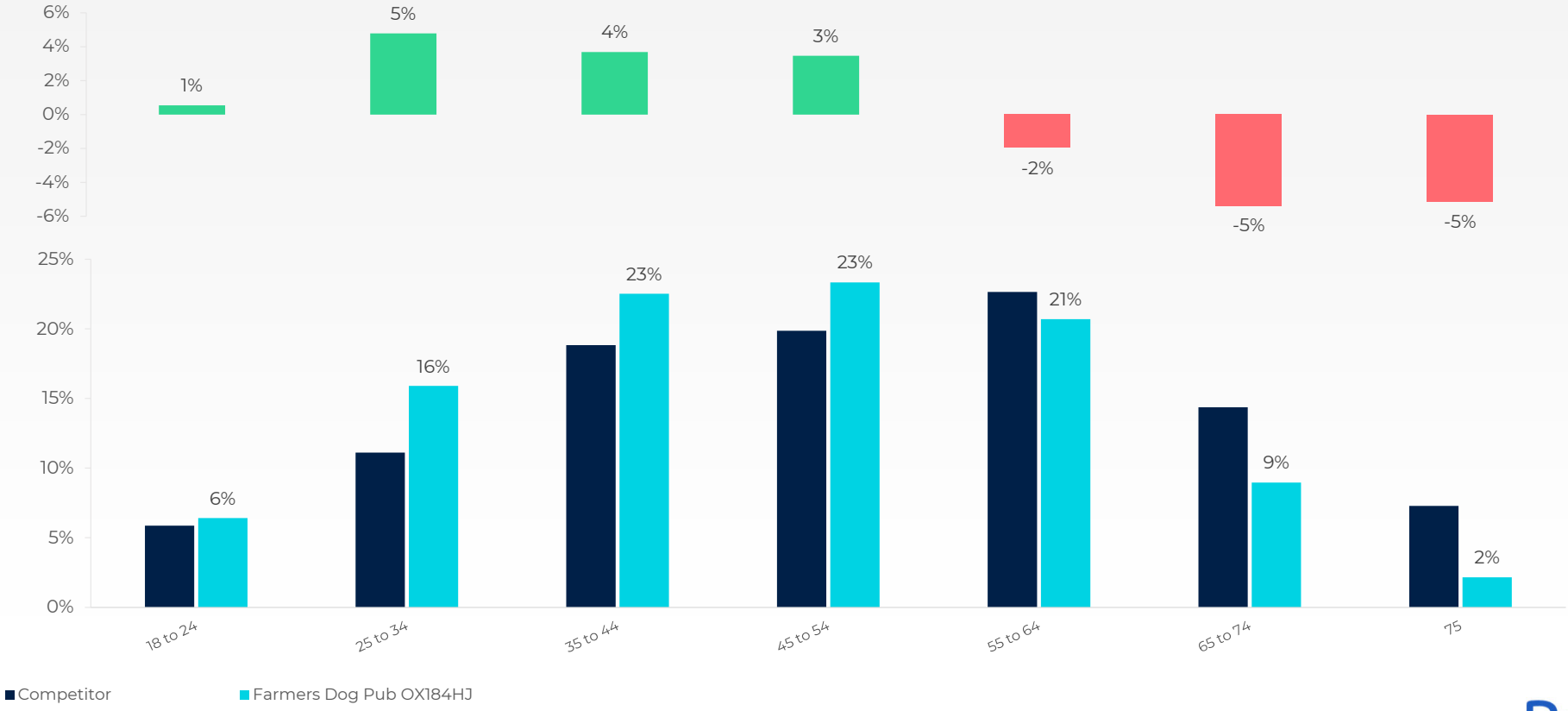
AGE

5 miles | 281 Chains | 30/04/2025 - 22/04/2026

Farmers Dog Pub OX184HJ | Site intel

How does the age profile of customers who visit Farmers Dog Pub OX184HJ compare versus its competitors?

% of spend for Farmers Dog Pub OX184HJ and 281 Chains in 5 Miles from 30/04/2025 - 22/04/2026 split by Age Range



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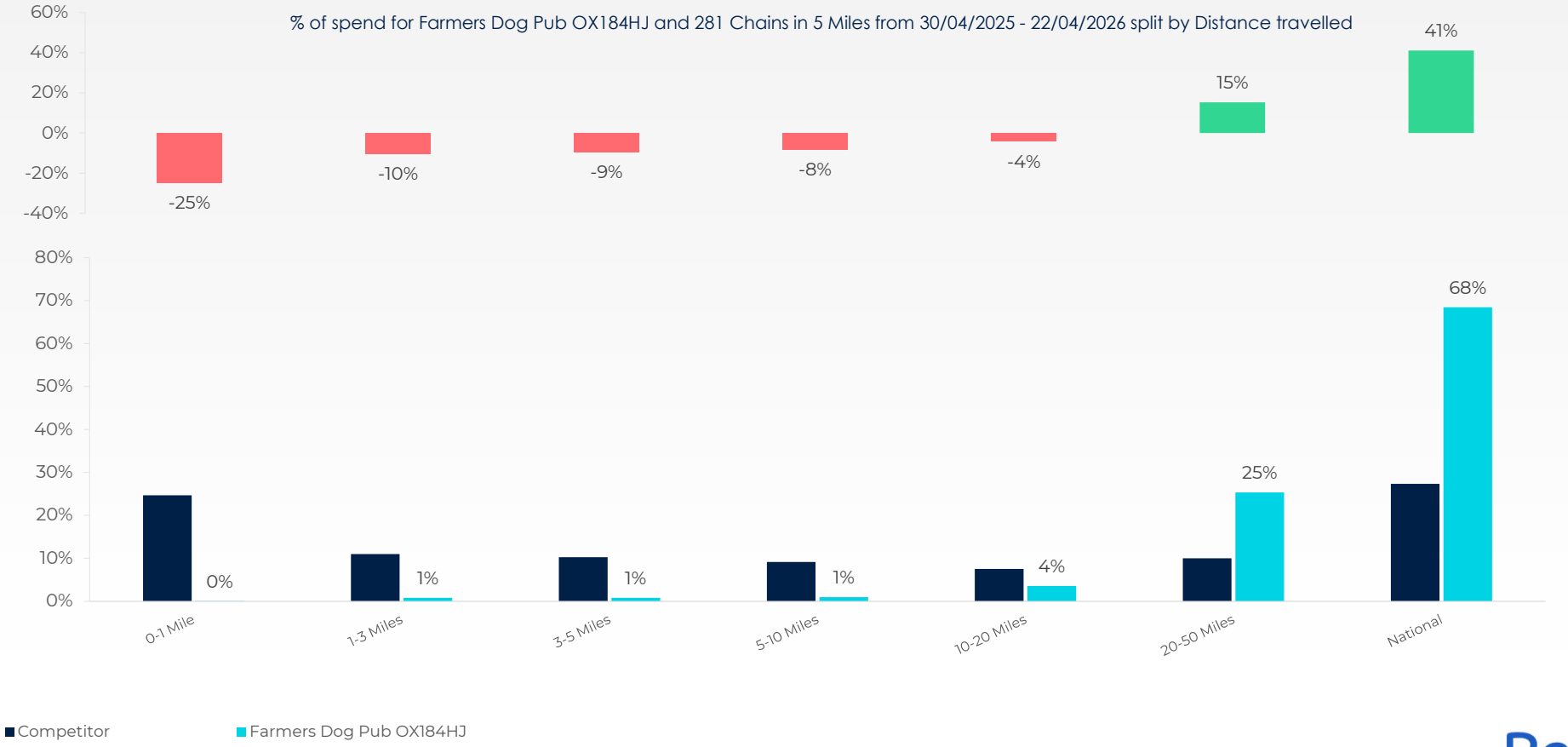
SPEND BY DISTANCE

5 miles | 281 Chains | 30/04/2025 - 22/04/2026

Farmers Dog Pub OX184HJ | Site intel

How does the spend profile of Farmers Dog Pub OX184HJ compare versus its competitors based on travel distances?

% of spend for Farmers Dog Pub OX184HJ and 281 Chains in 5 Miles from 30/04/2025 - 22/04/2026 split by Distance travelled



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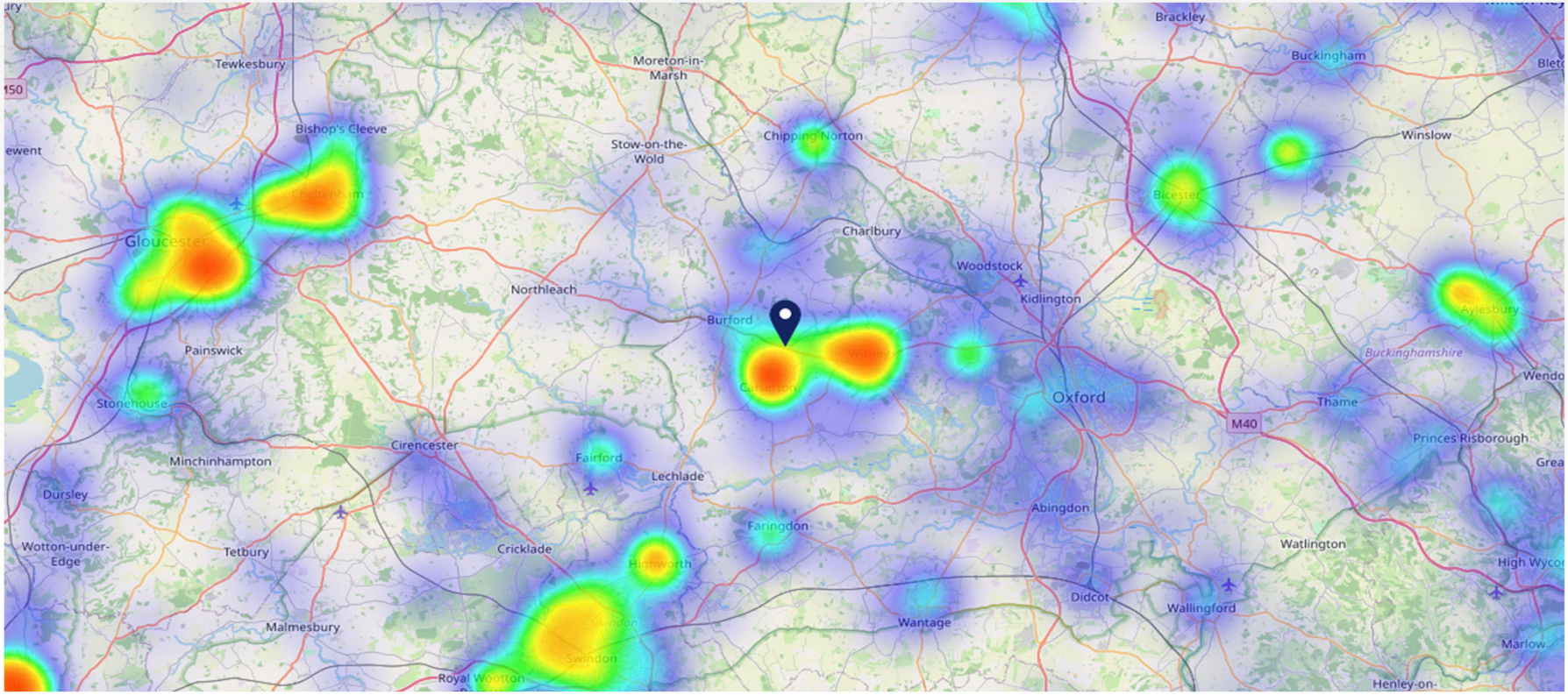
MAP OF GUEST ORIGIN

30/04/2025 - 22/04/2026

Farmers Dog Pub OX184HJ | Site intel

Where do customers of Farmers Dog Pub OX184HJ come from?

Where do customers of Farmers Dog Pub OX184HJ for 30/04/2025 - 22/04/2026 live



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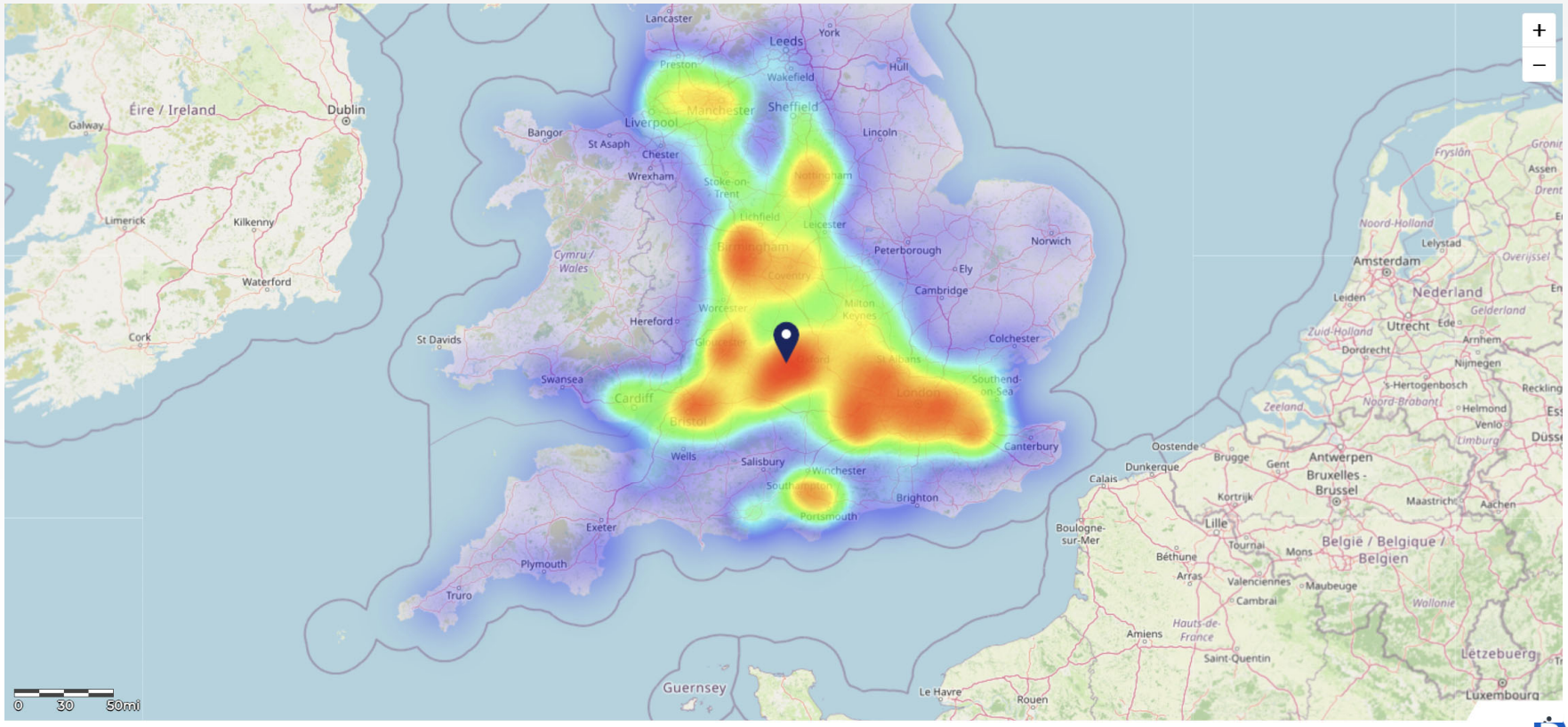
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Farmers Dog Pub OX184HJ | Site intel

Where do customers of Farmers Dog Pub OX184HJ come from?

Where do customers of Farmers Dog Pub OX184HJ for 30/04/2025 - 22/04/2026 live



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FINAL THOUGHTS - THE OPPORTUNITY

Leverage data & insight to help set your business up for success.

UNDERSTANDING COMPETITORS

Nationally & Locally

UNDERSTANDING LOCAL MARKETS

Customer & Competitors



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PLEASE GET IN TOUCH TO FIND OUT MORE:

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07808 096 145



Scan to request slides
/ get in touch

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