

CGA and AlixPartners Market Growth Monitor - May 2019



5,785

GROUP RESTAURANTS
AT MAR 2019

117,909



TOTAL NUMBER
OF **LICENSED
PREMISES** IN
BRITAIN AT
MAR 2019



2.3%
DECLINE

IN LICENSED PREMISES IN
THE YEAR TO MAR 2019

2.8%
DECLINE

DECLINE IN
RESTAURANTS
IN THE YEAR
TO MAR 2019



2.4%



**DECLINE IN LICENSED PREMISES
ON HIGH STREETS IN THE YEAR
TO MAR 2019**



10.1% INCREASE IN LICENSED PREMISES IN
LONDON IN THE FIVE YEARS TO MAR 2019

27.3%

INCREASE IN GROUP RESTAURANTS
IN THE FIVE YEARS TO MAR 2019



66

NET CLOSURES
OF GROUP RESTAURANTS
IN THE YEAR TO MAR 2019

244

NET NEW OPENINGS OF
FOOD-LED PUBS AND BARS IN
THE FIVE YEARS TO MAR 2019



4.1%

INCREASE IN NUMBER OF GROUP
WINE BARS / LICENSED CAFES IN
THE YEAR TO MAR 2019



“Some of the main narratives of this edition of the Market Growth Monitor—of licensed premises declining 2.3% in the last year, group restaurants going into reverse and signs of saturation on many high streets and city centres—are dispiriting. But there are plenty of bright spots too, including positive trends for the drink-led sector and improved headroom for growth for emerging restaurant operators. Brands that are resolutely focused on their customers and strike the right balance of distinctive food and drink have everything to play for in 2019.”

Peter Martin, CGA

“This edition sees an acceleration of the group restaurants closures trend, albeit after a period of sustained growth. But as larger managed groups consolidate their estates, smaller brands—particularly those with private equity or bank funding available to them—are seizing the opportunity to grow their site portfolios and take market share from less agile counterparts. The slowdown in closures of pubs and bars is another welcome trend, reflecting the growth in quality operators in the premium bars sector and the rise of experiential offers and distinctive drinks propositions.”

Graeme Smith, AlixPartners



About the Market Growth Monitor

The Market Growth Monitor from CGA and AlixPartners provides a quarterly snapshot of pub, bar and restaurant supply in Great Britain. Data is drawn from CGA's Outlet Index, a comprehensive, continually updated database of all licensed premises. For more information about the Monitor, contact CGA client director Andrew Dean at andrew.dean@cga.co.uk



AlixPartners
when it really
matters