2018 LONDON PUBS
ANNUAL DATA NOTE

CULTURAL INFRASTRUCTURE PLAN
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Data Note

Summary

This data note summarises the data for the 2018 London pubs audit update, prepared by GLA Economics as part of the Mayor’s Cultural Infrastructure Plan.

Headline findings

- London lost 60 pubs in 2015-16 (1.6% fall) and 85 pubs in 2016-17 (2.4% fall), more than one a week.

- During 2016-17, seven boroughs saw a net increase in pubs; these are Hackney, City of London, Camden, Bexley, Greenwich, Hounslow, and Lewisham.

- Campaign for Real Ale (CAMRA) data shows that conversion is a significant threat to pubs. This includes conversions to restaurants, cafes and shops as well as conversion or demolition for residential use. Further research is required about the impact that the government’s permitted development rights has had on conversions before their removal in May 2017.

- Small pubs are the most vulnerable. The number of small pubs in London has fallen by half (50%) since 2001, a decrease of 1,710 from 3,390. By comparison, the number of large pubs has increased by 28% over this period (an increase of 405 from 1,445).

- Whilst pubs are closing, the net people employed remains steady. The number of people employed in London pubs in 2017 was 46,400, broadly unchanged compared to 2016, when there were 46,300 employed.
Methodology

The two data sources used for this data release are:

- Inter-departmental business register (IDBR). This provides annual data on pubs, and pub employment, by borough and by pub size, from 2001 to 2017. ‘Pubs’ are defined as belonging to SIC code 56.30/2. Data was provided by ONS, with outputs rounded to the nearest 5. In this data, ‘small’ pubs are defined as those with fewer than 10 staff, and ‘large’ pubs as those with 10 staff or more. Data was published on the ONS website¹.

- CAMRA, who supplied data from their database, which includes current pubs and those that have closed. Data goes back to 2000. Their database also logs the reason for pub closures.

Distribution of pubs in boroughs

- London’s 3,530 pubs are not distributed evenly across London’s boroughs. Some boroughs have a large number (Westminster has the most, with 425), whereas some have few (Barking and Dagenham has the fewest, with 20).

- Pub numbers in London overall fell by 27% between 2001 and 2017, from 4,835 to 3,530. All boroughs apart from Hackney and Bexley saw a decline in pub numbers over this period. In Hackney, there were 20 more pubs in 2017 than in 2001, an increase of 13%, whereas Bexley had the same number of pubs in 2017 as in 2001.

- However, some boroughs have seen steeper falls than others. Barking and Dagenham saw the greatest relative fall. The borough had 25 fewer pubs in 2017 than 2001, a fall of 56%.

- More recently, the picture has been more mixed. Between 2012 and 2017, five boroughs saw an increase in pub numbers: Hackney (40 more pubs, +30%), Lewisham (10 more pubs, +17%), Kensington and Chelsea (10 more pubs, +9%), Southwark (10 more pubs, +6%), and Islington (10 more pubs, +5%). Boroughs that saw the largest fall in pub numbers over this period were Camden (30 fewer pubs, -11%), Hillingdon (25 fewer pubs, -23%), and Westminster (25 fewer pubs, -6%).

¹ ONS, ad hoc request for GLA, May 2018: https://www.ons.gov.uk/businessindustryandtrade/business/activitiesizeandlocation/adhocs/008409numberofpublichouseslicencedclubsrestaurantsandtakeawaysinlondon2001to2017
2016/17 data

- Looking just at changes over the most recent year (between 2016 and 2017), there is again a mixed picture. While overall pub numbers in London continued to fall (by 85 pubs), seven London boroughs saw an increase in pubs: Hackney (+15 pubs, +9%), City of London (+10 pubs, +7%), Camden (+10 pubs, +4%), Bexley (+5 pubs, +6%), Greenwich (+5 pubs, +7%), Hounslow (+5 pubs, +6%), and Lewisham (+5 pubs, +8%).

- Eight boroughs saw no change in pub numbers over the past year, and eighteen saw a fall in the number of pubs. The largest year-on-year fall was in Barnet, where there were 20 fewer pubs in 2017 than 2016 (a fall of 20%).

- See the table on the next page for all boroughs’ data.
Table: 2016-2017 Pubs number increase or decrease by Borough, rounded to nearest ‘5’ (IDBR).

<table>
<thead>
<tr>
<th>Area name</th>
<th>Pubs 2016</th>
<th>Pubs 2017</th>
<th>Percentage Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>3,615</td>
<td>3,530</td>
<td>-2%</td>
</tr>
<tr>
<td>Barking and Dagenham</td>
<td>20</td>
<td>20</td>
<td>0%</td>
</tr>
<tr>
<td>Barnet</td>
<td>100</td>
<td>80</td>
<td>-20%</td>
</tr>
<tr>
<td>Bexley</td>
<td>90</td>
<td>95</td>
<td>6%</td>
</tr>
<tr>
<td>Brent</td>
<td>75</td>
<td>70</td>
<td>-7%</td>
</tr>
<tr>
<td>Bromley</td>
<td>100</td>
<td>95</td>
<td>-5%</td>
</tr>
<tr>
<td>Camden</td>
<td>225</td>
<td>235</td>
<td>4%</td>
</tr>
<tr>
<td>City of London</td>
<td>150</td>
<td>160</td>
<td>7%</td>
</tr>
<tr>
<td>Croydon</td>
<td>90</td>
<td>85</td>
<td>-6%</td>
</tr>
<tr>
<td>Ealing</td>
<td>100</td>
<td>95</td>
<td>-5%</td>
</tr>
<tr>
<td>Enfield</td>
<td>75</td>
<td>65</td>
<td>-13%</td>
</tr>
<tr>
<td>Greenwich</td>
<td>70</td>
<td>75</td>
<td>7%</td>
</tr>
<tr>
<td>Hackney</td>
<td>160</td>
<td>175</td>
<td>9%</td>
</tr>
<tr>
<td>Hammersmith and Fulham</td>
<td>105</td>
<td>105</td>
<td>0%</td>
</tr>
<tr>
<td>Haringey</td>
<td>75</td>
<td>70</td>
<td>-7%</td>
</tr>
<tr>
<td>Harrow</td>
<td>55</td>
<td>45</td>
<td>-18%</td>
</tr>
<tr>
<td>Havering</td>
<td>65</td>
<td>60</td>
<td>-8%</td>
</tr>
<tr>
<td>Hillingdon</td>
<td>90</td>
<td>85</td>
<td>-6%</td>
</tr>
<tr>
<td>Hounslow</td>
<td>75</td>
<td>80</td>
<td>7%</td>
</tr>
<tr>
<td>Islington</td>
<td>210</td>
<td>205</td>
<td>-2%</td>
</tr>
<tr>
<td>Kensington and Chelsea</td>
<td>120</td>
<td>120</td>
<td>0%</td>
</tr>
<tr>
<td>Kingston upon Thames</td>
<td>65</td>
<td>65</td>
<td>0%</td>
</tr>
<tr>
<td>Lambeth</td>
<td>150</td>
<td>140</td>
<td>-7%</td>
</tr>
<tr>
<td>Lewisham</td>
<td>65</td>
<td>70</td>
<td>8%</td>
</tr>
<tr>
<td>Merton</td>
<td>55</td>
<td>45</td>
<td>-18%</td>
</tr>
<tr>
<td>Newham</td>
<td>50</td>
<td>50</td>
<td>0%</td>
</tr>
<tr>
<td>Redbridge</td>
<td>55</td>
<td>55</td>
<td>0%</td>
</tr>
<tr>
<td>Richmond upon Thames</td>
<td>125</td>
<td>125</td>
<td>0%</td>
</tr>
<tr>
<td>Southwark</td>
<td>185</td>
<td>175</td>
<td>-5%</td>
</tr>
<tr>
<td>Sutton</td>
<td>55</td>
<td>55</td>
<td>0%</td>
</tr>
<tr>
<td>Tower Hamlets</td>
<td>130</td>
<td>120</td>
<td>-8%</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>50</td>
<td>45</td>
<td>-10%</td>
</tr>
<tr>
<td>Wandsworth</td>
<td>135</td>
<td>130</td>
<td>-4%</td>
</tr>
<tr>
<td>Westminster</td>
<td>440</td>
<td>425</td>
<td>-3%</td>
</tr>
</tbody>
</table>
Total pub closures by reason

- CAMRA’s database collects information on pub closures. According to their data, there have been 2,510 pub closures in London between 2000 and April 2018, which is the full period over which CAMRA data is available. Their database breaks these down by reason. In almost half of cases (45% of the total), the reason for closure is not known, either coded explicitly as ‘unknown’, or recorded as ‘demolished’. Reviewing ten percent of those categorised as ‘unknown’ in the CAMRA data has shown that this sample were actually converted to residential. This means that the below figures may understate the impact of the different types of use conversions, but in particular the impact of conversions to residential.

- Of the 1,370 closures where a reason is recorded:
  
  o 468 (19%) pubs were converted to a restaurant or café (use class A3),
  o 317 (13%) were, in CAMRA’s classification, converted to ‘other’ new use, including housing (use class C3). NB It is not known what proportion housing comprises of the ‘other’ category.
  o 241 (10%) were converted to a shop (use class A1).
  o 221 (9%) were converted to a new use, but it is not known what new use.
  o 88 (4%) were converted to financial or professional services use (use class A2)
  o 33 pubs were closed but this was thought to be for temporary reasons.
Table: pub closures in London, 2000-18, by period and reason for closure (CAMRA)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Demolished</td>
<td>690</td>
<td>171</td>
<td>243</td>
<td>187</td>
<td>89</td>
<td>-</td>
</tr>
<tr>
<td>New use: Restaurant / café (class A3)</td>
<td>468</td>
<td>53</td>
<td>117</td>
<td>178</td>
<td>120</td>
<td>-</td>
</tr>
<tr>
<td>Unknown</td>
<td>452</td>
<td>13</td>
<td>27</td>
<td>82</td>
<td>300</td>
<td>30</td>
</tr>
<tr>
<td>New use: Other (inc. housing, class C3)</td>
<td>317</td>
<td>98</td>
<td>95</td>
<td>106</td>
<td>18</td>
<td>-</td>
</tr>
<tr>
<td>New use: Shop (A1)</td>
<td>241</td>
<td>19</td>
<td>64</td>
<td>118</td>
<td>40</td>
<td>-</td>
</tr>
<tr>
<td>New use: Unknown</td>
<td>221</td>
<td>17</td>
<td>46</td>
<td>89</td>
<td>66</td>
<td>3</td>
</tr>
<tr>
<td>New use: Financial / professional services (class A2)</td>
<td>88</td>
<td>8</td>
<td>31</td>
<td>36</td>
<td>13</td>
<td>-</td>
</tr>
<tr>
<td>Temporary closure</td>
<td>33</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>24</td>
<td>8</td>
</tr>
<tr>
<td>Total</td>
<td>2,510</td>
<td>379</td>
<td>623</td>
<td>797</td>
<td>670</td>
<td>41</td>
</tr>
</tbody>
</table>
Pubs and pub employment

- According to the Inter-departmental business register (IDBR), in 2017 there were 3,530 pubs in London. This was a fall of 85 pubs (-2.4%) on the previous year. This is a larger fall than in 2015-16, when the number of pubs in London fell by 60 (-1.6%). Between 2001 and 2017, the number of pubs in London fell by 27% (down 1,305 from 4,835).

- The number of people employed in London pubs in 2017 was 46,400, essentially unchanged on 2016, when there were 46,300 employed. Employment in London pubs in 2017 was 9% higher than in 2001 (up by 3,800 from 42,600).

- The number of pubs in London declined fairly consistently between 2001 and 2017. Employment in pubs fell between 2001 and 2010, but increased substantially thereafter.

- See the graph below for trends in pubs and pub employment.
Pub size

- In 2017 there were 3,530 pubs in London. Of these, 1,680 (48%) were ‘small’, here defined as having fewer than 10 staff. The remaining 1,850 (52%) were ‘large’, with 10 staff or more. Up until 2015 there were more small pubs than large pubs.

- The number of small pubs in London has fallen by half (50%) since 2001, a decrease of 1,710 from 3,390. By comparison, the number of large pubs has increased by 28% over this period (an increase of 405 from 1,445). All the increase in the number of large pubs has happened since 2011.

- Whereas in 2001 70% of London pubs were small, in 2017 only 48% were small.

- Between 2001 and 2017, every borough except one saw a decline in the number of small pubs (in Bexley there was no change over the period).

- Boroughs which saw the largest fall in the number of small pubs were Kensington and Chelsea (55 fewer small pubs, -61%), Newham (55 fewer small pubs, -61%), Hammersmith and Fulham (40 fewer small pubs, -60%). In all, 23 boroughs saw the number of small pubs fall by 50% or more between 2001 and 2017.

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2 Technically this is the definition of a ‘micro’ business, but the term ‘small’ is used in this context. This is a definition used across the EU. [http://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en](http://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en) Note that the tables show total ‘employment’, whereas the definition refers to and the banding was calculated based on ‘employees’.
However, while all boroughs (apart from Bexley) saw a fall in the number of small pubs between 2001 and 2017, 15 boroughs saw an increase in the number of large pubs. The greatest increases in large pubs were in Westminster (+80 large pubs, +43%), Hackney (+65 large pubs, +650%), Southwark (+65 large pubs, +186%), and Camden (+60 large pubs, +75%).

On the other hand, thirteen boroughs saw a decrease in the number of large pubs over the period 2001-17 as well as a decrease in the number of small pubs. Boroughs with the most significant reduction in the number of large pubs between 2001 and 2017 were Croydon (-15 large pubs, -30%), Havering (-15 large pubs, -30%) and Waltham Forest (-15 large pubs, -43%). The borough with the greatest relative fall in large pubs between 2001 and 2017 was Barking and Dagenham, with a 67% fall in large pubs (a fall of 25, from 45).
Change in number of pubs by size, 2001-17
(‘small’ = fewer than 10 staff)

City of London
Barking and Dagenham
Barnet
Bexley
Brent
Bromley
Camden
Croydon
Ealing
Enfield
Greenwich
Hackney
Hammersmith and Fulham
Haringey
Harrow
Havering
Hillingdon
Hounslow
Islington
Kensington and Chelsea
Kingston upon Thames
Lambeth
Lewisham
Merton
Newham
Redbridge
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