

IAS Institute of Alcohol Studies

BALANCE Reducing alcohol harm

Behind the bar

What publicans really think about alcohol policy

August 2026

Acknowledgements

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ABOUT IAS

The Institute of Alcohol Studies (IAS) is an independent institute bringing together evidence, policy and practice from home and abroad to promote an informed debate on alcohol's impact on society. Our mission is to advance the use of the best available evidence in public policy discussions on alcohol. Our vision is for a society where alcohol harm is rare and equal opportunities for good health and wellbeing exist for all. The IAS is a company limited by guarantee (no. 05661538) and a registered charity (no. 1112671).

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ABOUT BALANCE

Balance is the regional alcohol harm reduction programme for the North East of England. Launched in 2009, Balance works at a population level to reduce alcohol-related harms. It aims to change public culture and advocate for effective national policies to make alcohol less desirable, affordable, and accessible.

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Executive summary

Alcohol harm reached record highs after the pandemic, but at the same time pubs across the country have been struggling. This paradox raises an important question: what is driving harm to both health and hospitality?

Pubs and public health have more in common than many people consider. Both have a stake in thriving communities where people can socialise, connect, and enjoy themselves in ways that reduce harm and support wellbeing.

But many of the issues facing pubs have been driven by the shift in alcohol sales away from hospitality and towards supermarkets, off-licences, and rapid delivery apps – a trend that has made cheap, home-drunk alcohol more available, pubs harder to sustain, and alcohol deaths soar.

Yet the public debate is still dominated by trade bodies that are often presented as "the voice of the industry", despite mainly representing large pub companies and multinational alcohol producers whose interests are closely tied to the off-trade. Publicans themselves are rarely asked what they think. This report does that directly, by presenting findings from 200 interviews with publicans across England.



1/3

Over 1/3 of publicans think society's relationship with alcohol has got worse since 2020.



62%

Publicans think the off-trade is the problem. 62% say supermarket alcohol is too cheap; 60% want government to close the price gap with pubs.



58%

Publicans back the policies trade bodies lobby against. 58% support minimum unit pricing in England against just 14% opposed.



56%

Over half support health warnings on labels; 46% back bringing alcohol marketing rules in line with those for unhealthy food against only 17% opposed.



75%

75% back a lower drink-drive limit – including a majority of rural publicans, whom the BBPA has specifically claimed would suffer most.



43%

Their real worries are costs, not red tape. Rent, energy, and staffing costs (43% each), supplier costs (41%) and business rates (33%) dominate.



67%

Two-thirds want to see more investment in both alcohol treatment (67%) and public education (67%).



56%

A majority wants stricter licensing rules in the off-trade: 56% in favour, 20% opposed.

With home drinking resulting in deaths and hospital admissions at record levels, this is where the interests of public health and publicans converge. Sensible public policy can simultaneously look after both, with a key role for licensing and pricing policies at the core. In 2025, IAS gathered policy recommendations from over 40 experts in alcohol research, treatment, and policy, and published them in *A Healthier Future: A long-term vision to tackle alcohol harm in the UK*. The following recommendations are the policies which overlap with that vision and what publicans called for in this report.

POLICIES TO PROTECT HEALTH AND SUPPORT COMMUNITIES



1. Narrow the on/off-trade price gap, by significantly increasing off-trade duty, and expanding Draught Relief.



2. Introduce minimum unit pricing in England – which evidence shows would narrow the price gap between pubs and the off-trade.



3. Introduce tougher drink-drive regulations (as set out in the Road Safety Strategy).



4. Empower local authorities to regulate hours of sale and online deliveries of alcohol.



5. Invest further in treatment and education.



6. Add health warnings to alcohol labels.



7. Bring alcohol marketing rules in line with those for unhealthy food.

SUPPORT FOR PUBS AND PUBLICANS

In addition, publicans called for the following support from government. Although these are not public health measures, if they are used to shift drinking away from the off-trade to the on-trade, alongside public health policies, there is rationale for them supporting public health too:



1. Reduce business rates for pubs.*



2. Reduce the wider cost burden on pubs – energy, rent, staffing, food VAT, employer NICs.



3. Ground licensing reform in publicans' actual priorities, not assumed ones.

> We don't need alcohol to be cheaper. We need government to recognise the difference between a pint served in a regulated community pub and cheap alcohol sold for consumption at home.
>
> *Adam Taylor, White Lion, Barrow-in-Furness*

** At the time of writing, the UK Government recently announced that it would reduce business rates for pubs, clubs, and music venues. The survey was undertaken before that announcement*

Introduction

Alcohol harm has increased significantly in recent years. UK alcohol-specific deaths rose from 7,565 in 2019 to a record 10,473 in 2023 – a rise of 38% in just four years – and despite a fall to 9,809 in 2024, remain far above pre-pandemic levels.[1] The latest figures also show over 1 million hospital admissions a year in England for conditions caused by or worsened by alcohol.[2] The total societal cost of alcohol harm in England is estimated at £27bn, equivalent to £485 per head of population.[3]

Drinking patterns have also shifted a great deal since IAS last asked publicans for their views, in *Pubs Quizzed (2017)*. Almost a decade on, a great deal has changed for the sector: a pandemic that closed pubs' doors for months and permanently changed some customers' habits, a cost-of-living crisis that has hit pub margins and household budgets alike, and the rise of rapid alcohol delivery apps that have made off-trade drinking easier than ever without leaving the sofa. These home delivery arrangements mean that people whose deteriorating health limits their mobility can now maintain their consumption more easily than in the past. That shift has widened the gap between the on- and off-trade considerably, with a growing share of alcohol bought from supermarkets and off-licences – and a growing share of the harm it causes concentrated among those buying it there.

The government's own attempt to address pub problems has, so far, fallen short of that goal. In 2025, a Licensing Taskforce – co-chaired by Greene King's chief executive and drawn largely from trade bodies and hospitality chains – was convened to recommend reforms aimed at reviving the sector, feeding into the National Licensing Policy Framework (NLPF) published later that year. But the taskforce included no one representing pub interests alone and no representative from the Department of Health and Social Care or any public health body, despite public health's formal role as a responsible authority in local licensing decisions.[4] Public health researchers have also pointed out a more basic flaw: the Licensing Act 2003 licenses on- and off-sales under the same framework, rather than as separate regimes. Although the government has said its licensing reforms are aimed at the on-trade, the NLPF is being delivered through non-statutory guidance rather than new legislation, giving it no legal means of confining "growth-friendly" changes to pubs and wider hospitality alone. Any loosening to the on-trade would, in principle, extend to supermarkets and off-licences too.[5]

In July 2026, new Prime Minister Andy Burnham announced that the government would cut business rates on pubs, clubs, and live venues by 20%, potentially by increasing taxation on businesses which "do not make a positive contribution to local communities".[6] This highlights how nuanced public policy can support places with community value while simultaneously reducing the availability of products that cause social and economic harms.

Yet, one of the key challenges for government is how to reduce alcohol harm in a way that doesn't harm hospitality – and the way elements of the alcohol industry still portray these aims as in opposition to one another. This is largely a function of lobbying: trade groups are funded by multinational drinks producers whose profits depend on off-trade retail sales. These trade groups (such as the British Beer and Pub Association (BBPA) and UKHospitality) and dominant pub-owning companies (such as Stonegate, owner of the Slug &

1. ONS (2026), Alcohol-specific deaths in the UK: registered in 2024.
2. DHSC (2026), Alcohol Profile, Admission episodes for alcohol-related conditions (Broad).
3. IAS (2024), Economy factsheet, Cost of alcohol harm in England, 2021/22.
4. DBT (2025), Licensing policy sprint: joint industry and HM government taskforce report.
5. Nicholls, J., & Fitzgerald, N. (2026). Regulatory capture in UK alcohol licensing policy: The 2025 'licensing taskforce' report. Addiction, 121(1), 5-7.
6. BBC News (2026), Burnham says 20% business rates cut for English pubs 'a first step'.

Lettuce chain, and Star Pubs, the pub arm of Heineken UK) have long argued that evidence-based public health measures – higher duty, marketing restrictions, minimum unit pricing, a lower drink-drive limit – put pubs at risk, while publicans themselves are rarely, if ever, asked what they actually think. As the Chair of the Campaign for Pubs, Paul Crossman, has written:

> "Westminster politicians 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."

Pubs are, in effect, used as a shield: a sympathetic face for policy positions that serve the commercial interests of the wider industry – particularly multinational drinks producers, which are often based abroad – and don't necessarily serve the businesses on the high street.

But hospitality and the health of the nation share plenty of common ground. For years, one of the biggest threats to pubs has been this shift from on-trade to off-trade drinking, fuelling the rise in harm. Among several reasons, the public health rationale for shifting alcohol consumption from the off-trade back to the on-trade is that the Licensing Act 2003 puts a legal responsibility on the on-trade to not serve alcohol to people deemed intoxicated; higher risk drinkers are also more likely to consume cheap, off-trade alcohol; and the rise in rapid online deliveries in recent years has ramped up harm, with many people losing family members, only to find that delivery apps were sending them huge quantities of alcohol before they died.

For pubs, there is a clear business case for shifting drinking back to the on-trade. But there is also a broader economic case. Recent modelling by the Sheffield Addictions Research Group found that a 10% cut in off-trade alcohol spending is estimated to add £2.54 billion in gross value added to the UK economy and support around 43,000 jobs, largely because so much of what's spent on alcohol in supermarkets and off-licences leaks abroad to global drinks producers and import supply chains. A 10% cut in on-trade spending, by contrast, is estimated to cost the economy £2.68 billion and over 72,000 jobs – because money spent in pubs overwhelmingly stays local, paying staff wages and domestic suppliers.[7] Policy that shifts drinking from the off-trade to the on-trade would, in other words, be good for public health and good for the UK economy – not a trade-off between the two.

This report spotlights publicans, asking them directly what they think about the UK's drinking culture, the challenges facing their businesses, and the alcohol policies being debated in Westminster. In doing so, it explores where government could support pubs and the nation's health at the same time, and show that its health and economic ambitions can go hand-in-hand.

7. Morris, D., Gillespie, D., James, M., Breeze, P., & Brennan, A. (2026). Modelling the economic effects of reducing the consumption of unhealthy commodities: An intersectoral input–output approach. Addiction, 121(6), 1398-1407.



Methods and respondent profiles

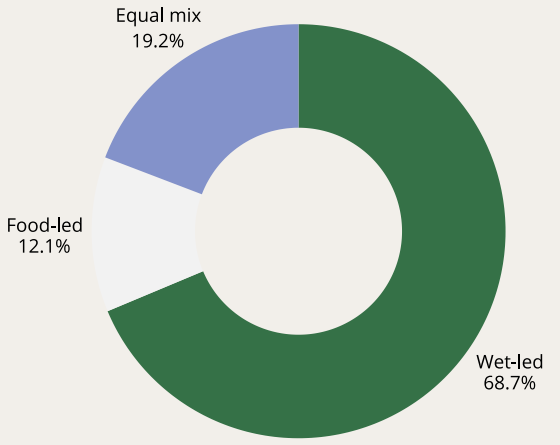
IAS and Balance commissioned Bluegrass Research to interview 200 publicans across England. Respondents were sourced from a range of business listings to avoid bias from relying on any single source. All were contacted and interviewed by telephone in May 2026, and screened at the outset to confirm they were the owner or landlord of the premises, ensuring interviews captured the views of those actually running each business. Interviews were conducted against quotas: 70 of the 200 interviews were set in the North East, with the remaining 130 spread across the rest of England. Results were subsequently re-weighted so that the North East did not overrepresent the final findings.

The sample covered a range of premises, predominantly town/city pubs (42%), gastro pubs (26%), rural/ country pubs (8%) and suburban pubs (6%), and a mix of ownership structures: managed and owned by a chain or group (27%), pub/brewery-owned (22%), owned freehold and run by the owner (21%), tenanted (12%), leased (11%), owned freehold and run by someone else (9%), and leased free of tie (2%). Two-thirds of publicans (68%) ran wet-led pubs (i.e. not serving meals), 12% were food-led, and 19% ran an equal mix of both.

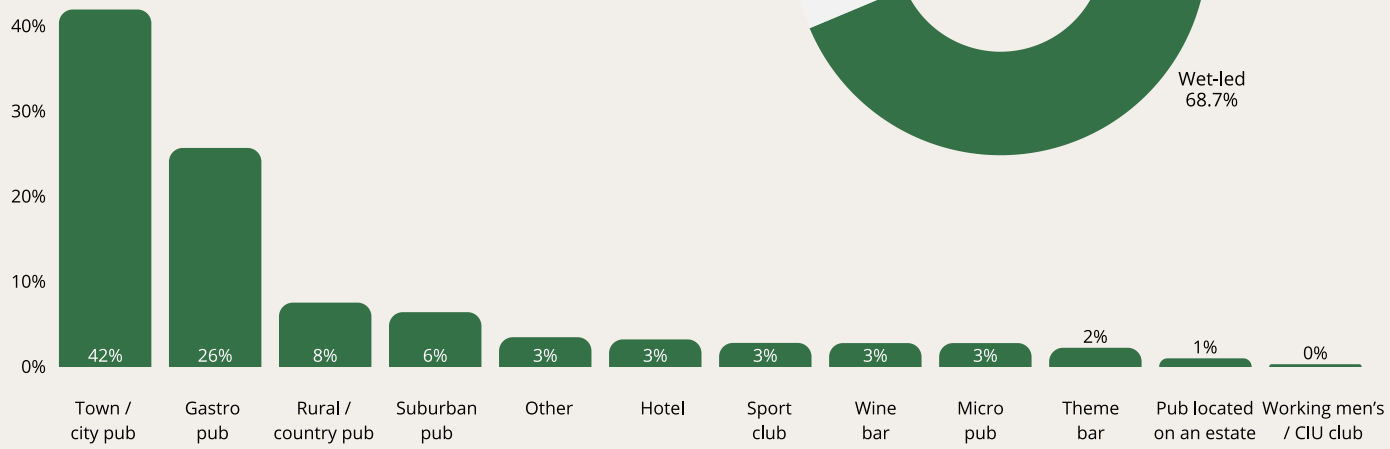
In terms of trade body membership, 24% belonged to CAMRA (Campaign for Real Ale), 9% to the British Institute of Innkeeping, 7% to Drinkaware, and 1% each to the British Beer and Pub Association (BBPA) and UKHospitality.

Although Bluegrass aimed for a representative sample, this remains a survey of self-selecting licensees rather than a census; findings should therefore be read as indicative of the range of views across the sector, rather than as precise population estimates.

Are you a wet-led or food-led premise?



Which of the following best describes the premises?

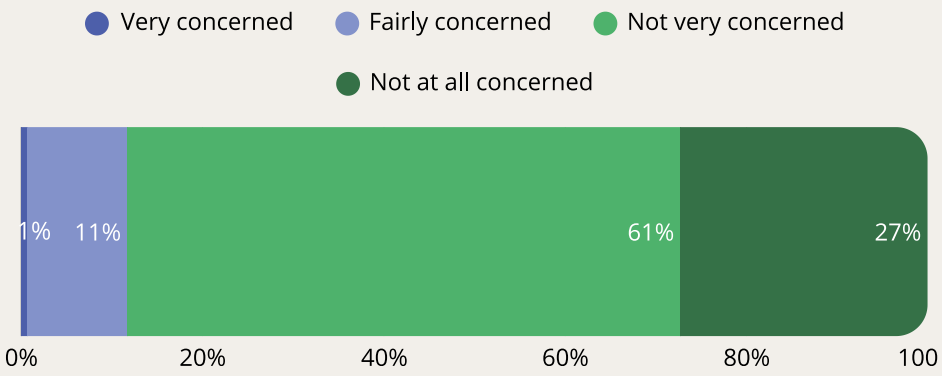


Results

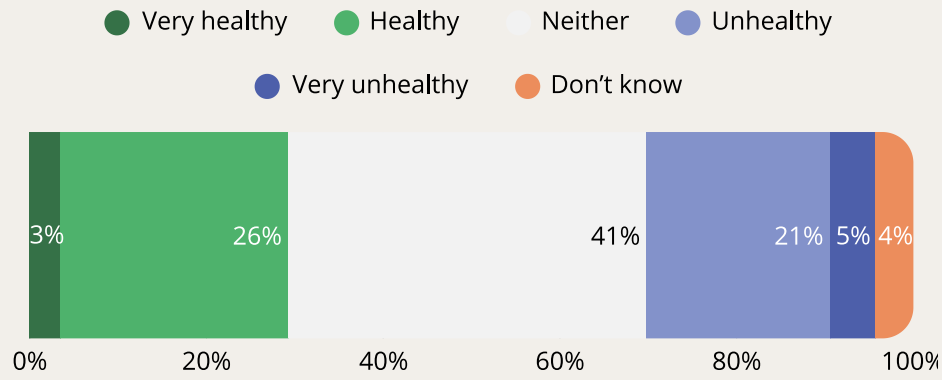
What publicans say about England's drinking culture and customer behaviour

Publicans are, on the whole, unconcerned about their own customers' drinking: just 12% voiced any concern about customers drinking too much, against 88% who said they were not concerned. However, views on whether the UK has a healthy relationship with alcohol were far more mixed: 29% said it was 'healthy' or 'very healthy', 26% said 'unhealthy' or 'very unhealthy', and the remainder were either unsure or placed it somewhere in between.

To what extent, if at all, are you concerned about your customers drinking too much?

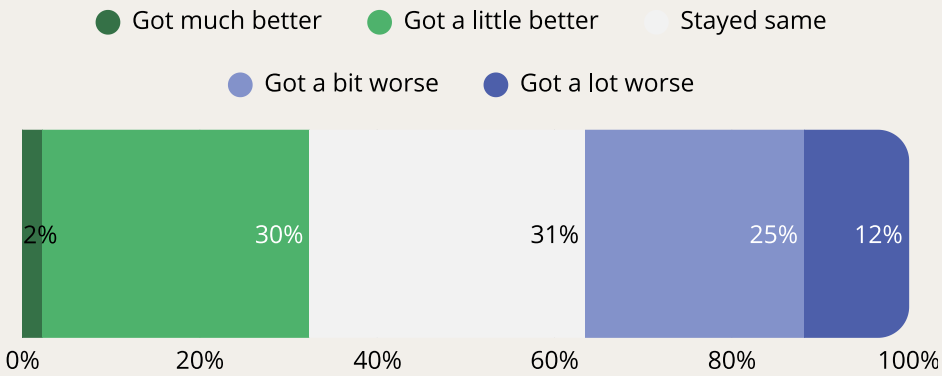


To what extent do you think the UK has a healthy relationship with alcohol?



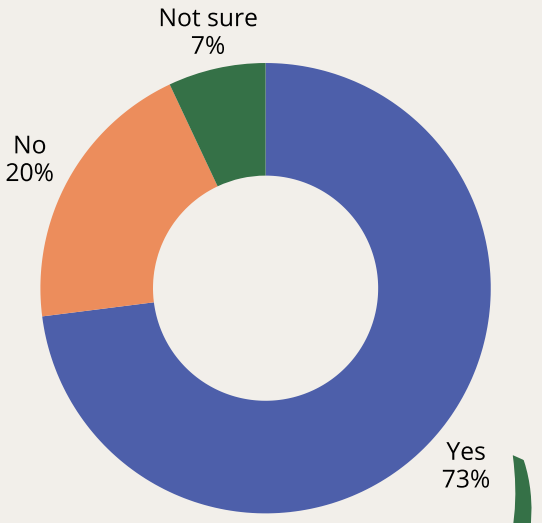
Opinion on the post-COVID trajectory of that relationship was similarly split three ways, with roughly a third of publicans saying it has improved, a third saying it has worsened, and a third saying it has stayed the same.

How do you think this relationship has changed, if at all, post-COVID?

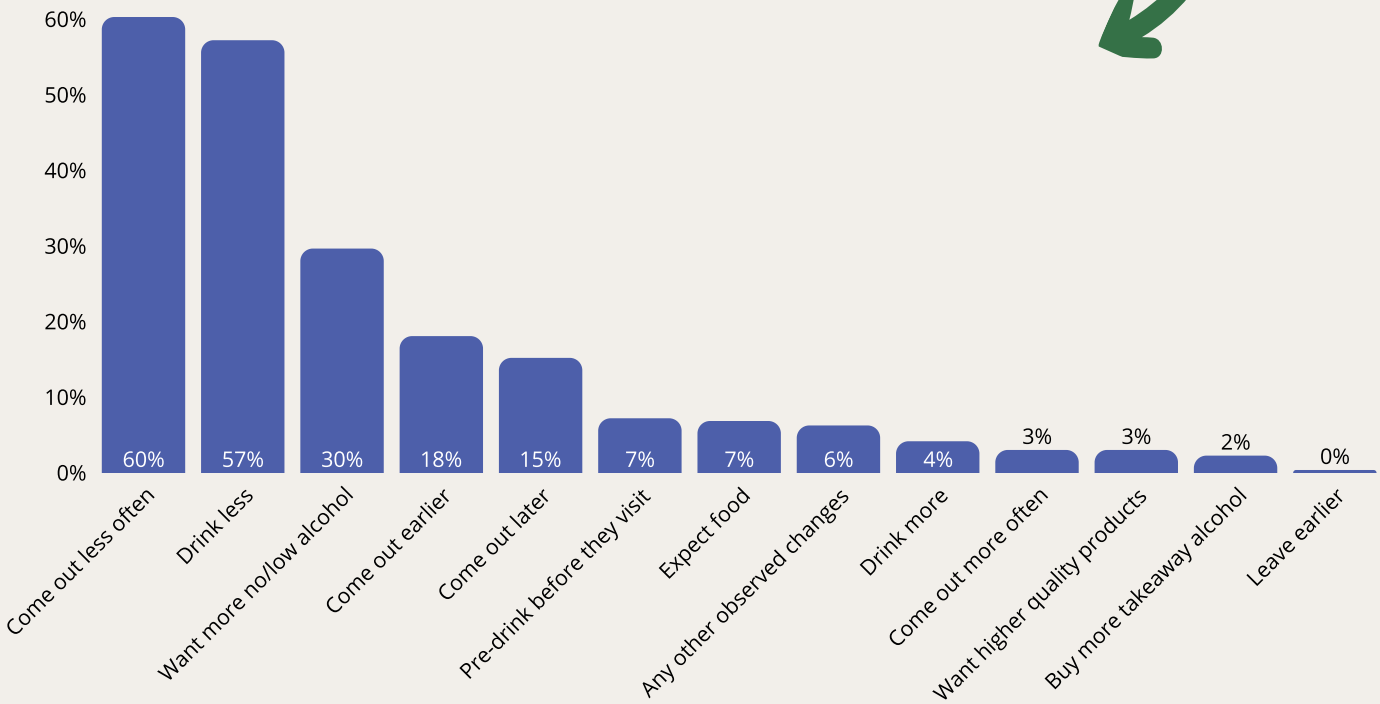


Where publicans are far more united is on whether drinking patterns have changed at all. Almost three-quarters (73%) said their customers' drinking patterns have shifted over the past few years. Among those who noticed a change, the dominant explanations were that people are coming out less often (60%) and drinking less when they do (57%), with three in ten (30%) also pointing to rising demand for no- and low-alcohol options.

Have the drinking patterns of your customers changed over the past few years?



If yes, in what ways have they changed?



These findings echo the wider 'age of moderation' narrative: falling consumption among young people over recent decades, and a growing share of people abstaining altogether. But that story sits alongside a sharp rise in alcohol deaths from 2020 – a rise driven not by everyone drinking more, but by polarisation. More people are cutting back or abstaining, while a smaller group is drinking at increasingly higher-risk levels.

8. Angus, C., Henney, M., & Pryce, R. (2024). Modelling the longer-term health and health inequality impacts of changes in alcohol consumption during the COVID-19 pandemic in England. Journal of Public Health, 46(2), 286-293.

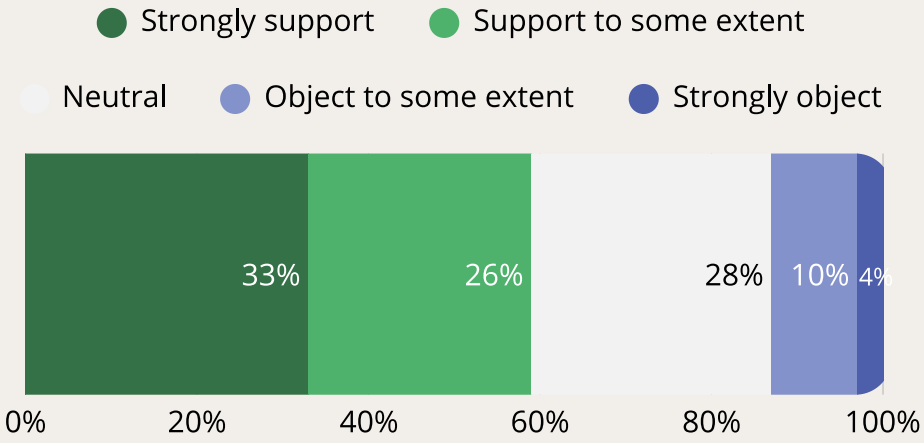
Publican views on policies to tackle alcohol problems

Publicans were also asked their position on specific policies that the government could introduce to reduce alcohol harm in the UK. Many of these policies have been criticised by alcohol industry trade bodies and multinational producers, such as proposals to reduce the drink-drive limit, increasing supermarket alcohol prices via duty increases and minimum alcohol pricing, and health warnings on alcohol labels. However, publicans were broadly supportive of all of these measures, and showed strong support for a few.

Minimum unit pricing and cheap off-trade alcohol

The majority of publicans (58%) said they support the introduction of minimum unit pricing (MUP) in England, against just 14% opposed. Support was even higher among North East publicans, at 79%, where the regional alcohol harm reduction programme Balance has been campaigning for the introduction of a minimum unit price for over a decade, and possibly also reflecting proximity to Scotland, where the policy has now been running long enough to show results. MUP sets a floor price below which a unit of alcohol cannot legally be sold; in Scotland, that floor currently sits at 65p per unit. A 2023 Public Health Scotland evaluation found that the policy reduced off-trade alcohol sales by 3% and reduced alcohol-specific deaths by 13.4% in the two and a half years after introduction – with the largest reductions among men, people aged 65 and over, and those living in the most deprived areas.

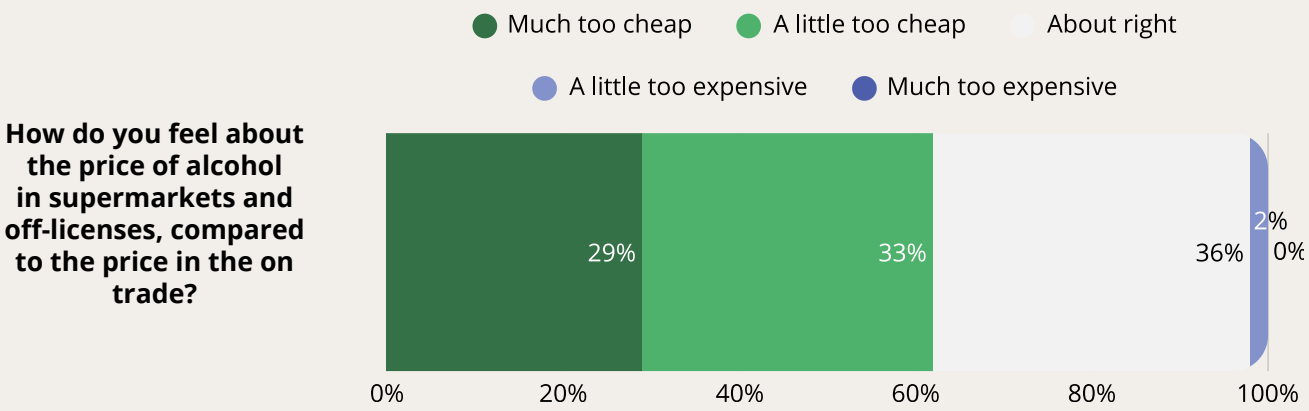
To what extent would you support or object to the introduction of minimum unit pricing in England?



Publicans are also more supportive of MUP than the public at large: the most recent Public First polling put public support at 45%, with 29% opposed.[10] The likely explanation is that publicans see MUP as a practical fix for a problem they live with daily – the widening price gap between cheap off-trade alcohol and what they can charge across the bar.

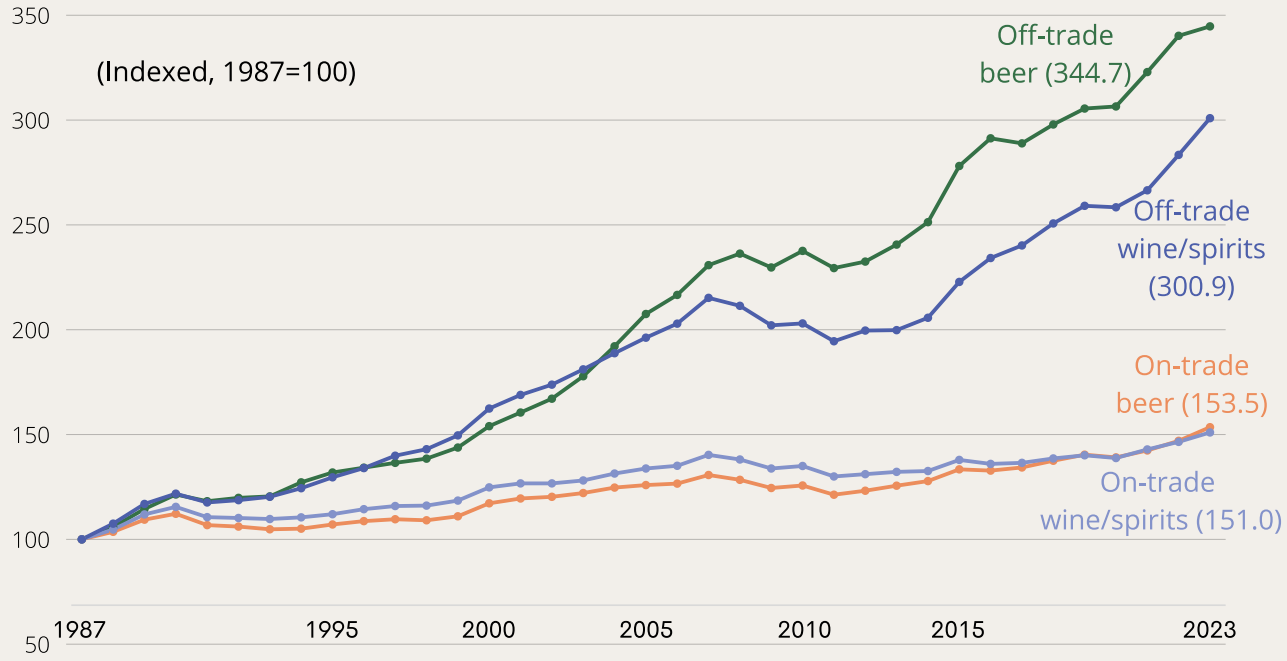
That reading is backed up by publicans' own views on off-trade pricing. Nearly two-thirds (62%) said supermarket and off-licence alcohol is either 'a little' or 'much' too cheap, and 60% supported government action to bring off-trade prices closer in line with pub prices.

9. Patterson, C., Giles, L., Whitehead, R., Greci, S., Ferguson, K., Fraser, C., ... & Beeston, C. (2023). Evaluating the impact of minimum unit pricing for alcohol in Scotland: a theory-based synthesis of the evidence. The Lancet, 402, S14.
10. ASH (2025), New Polling for Action on Smoking and Health, Polling tables.



Off-trade alcohol has become dramatically more affordable compared to on-trade prices (affordability means what the cost of alcohol is relative to income). For instance, off-trade beer is now 245% more affordable than it was in 1987, compared with just 54% for on-trade beer over the same period (see chart below). That widening gap has helped drive a broader shift in where people drink – a few decades ago, most alcohol was consumed in pubs; today, around three-quarters is bought through the off-trade.[11] This shift matters beyond the trade's own finances: higher-risk drinkers account for a disproportionate share of off-trade alcohol revenue,[12] pubs generate far greater social and community value than a supermarket alcohol aisle, and on-trade servers carry a legal duty under the Licensing Act 2003 not to knowingly serve someone who is already intoxicated – a safeguard that doesn't exist for off-trade sales.

Rising affordability of on- and off-trade products, 1987 to 2023



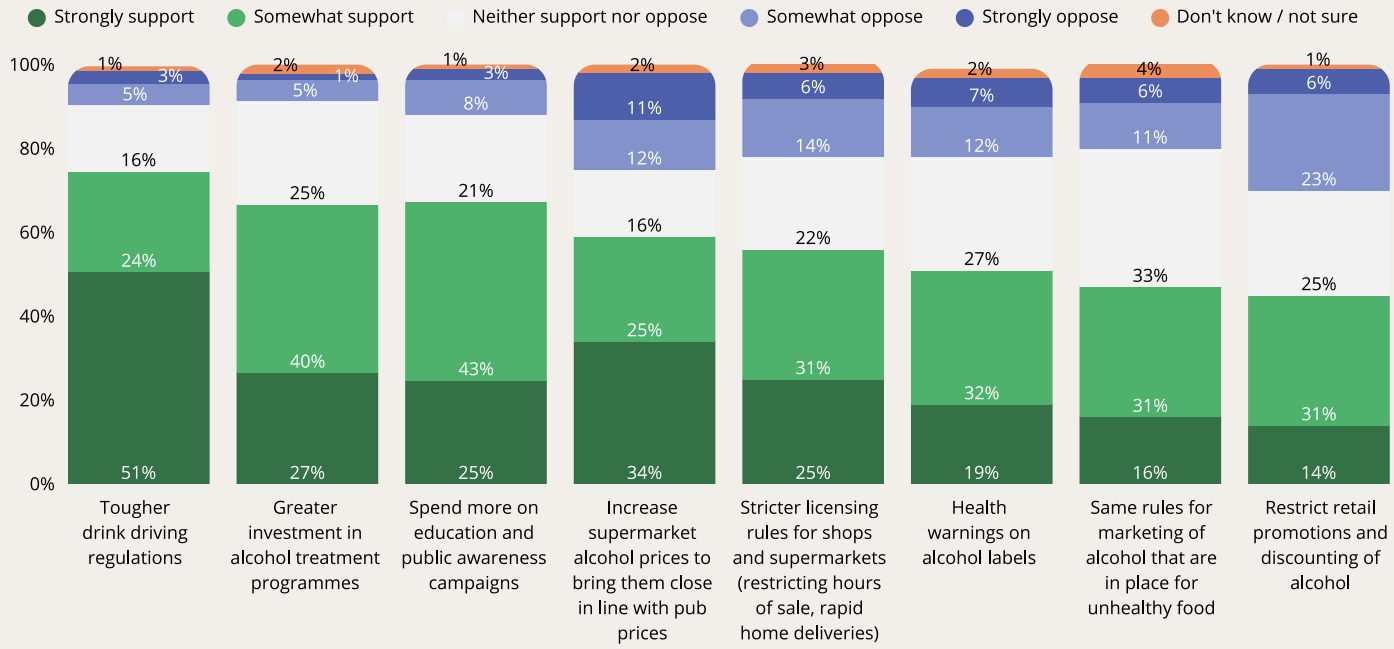
Sources: NHS Digital, Statistics on Public Health, England 2024 - Affordability and Expenditure Statistics: Data Tables for 2023 | ONS, Consumer price inflation tables, January 2025

On pricing, it is clear that publicans' commercial interests and public health priorities point in the same direction. It's a useful reminder that we should be cautious when alcohol producers frame one against the other.

11. Drinks Retailing (2026), Home drinking dominates as 73% of alcohol bought in the off-trade.
12. Bhattacharya, A., Angus, C., Pryce, R., Holmes, J., Brennan, A., & Meier, P. S. (2018). How dependent is the alcohol industry on heavy drinking in England? Addiction, 113(12), 2225-2232.

Support for other alcohol policies

Below is a list of things that other people have said that governments might do to tackle alcohol harm in the UK. To what extent, if at all, would you support these actions?



As the above chart shows above, publicans were also strongly in favour of tougher drink-drive regulations – 75% supported this, against just 8% opposed. That finding sits in direct tension with the BBPA's public position – in 2026 the trade organisation raised concerns about the government's Road Safety Strategy proposals to lower the drink-drive limit, warning in particular that rural pubs would suffer if England's limit was brought into line with most of the rest of Europe.[13] The survey doesn't bear this out – even among rural publicans, 47% supported tougher regulations against 26% opposed, with the remainder neutral.

Investment-focused measures also commanded strong support: 67% backed greater investment in alcohol treatment programmes, and the same proportion supported increased government spending on education and public awareness campaigns.

Majorities also supported stricter licensing rules for the off-trade (56% in favour, 20% opposed) and health warnings on alcohol labels (52% in favour, 19% opposed). Mandatory product labelling was the flagship alcohol measure in the government's 10 Year Health Plan, intended to help consumers understand the health risks of what they're drinking.[14] The industry body the Portman Group has pushed back, arguing there is no case for wider warning labels given that overall consumption is falling and most people already drink within the Chief Medical Officer's low-risk guidance – and alcohol multinationals and trade bodies lobbied government directly against the plans in early 2026, citing the cost to industry.[15] Publicans, on this evidence, side with the public rather than trade organisations: Public First polling in 2025 found 75% public support for health warnings on alcohol. People, it seems – publicans included – largely think drinkers have a right to know what they're consuming.

Support also outweighed opposition on bringing alcohol marketing in line with the restrictions already placed

13. The Morning Advertiser (2026), Trade bodies urge 'evidence-led' approach to drink-drive limit changes.
14. DHSC (2025), Fit for the Future: 10 Year Health Plan for England.
15. The Financial Times (2026), Alcohol health warning plan sparks drinks industry outcry

on unhealthy food and drink, which can only air on TV after 9pm and are banned from online advertising entirely. 46% of publicans backed equivalent restrictions on alcohol marketing, against 17% opposed. Public health groups have long pointed out the inconsistency of alcohol's exemption from these rules, given it is unambiguously an unhealthy product.[16] The government had considered bringing alcohol marketing into line with food and drink restrictions as part of the 10 Year Health Plan, but dropped the proposal after sustained industry lobbying – including a letter from pub company Greene King to the Department of Health & Social Care (DHSC) warning of "a crippling impact on the UK's pubs", offered without supporting evidence.[17] This survey suggests otherwise: publicans are considerably more supportive of marketing restrictions than opposed to them, whatever multinational brewers, pub companies, and trade bodies have claimed on their behalf.

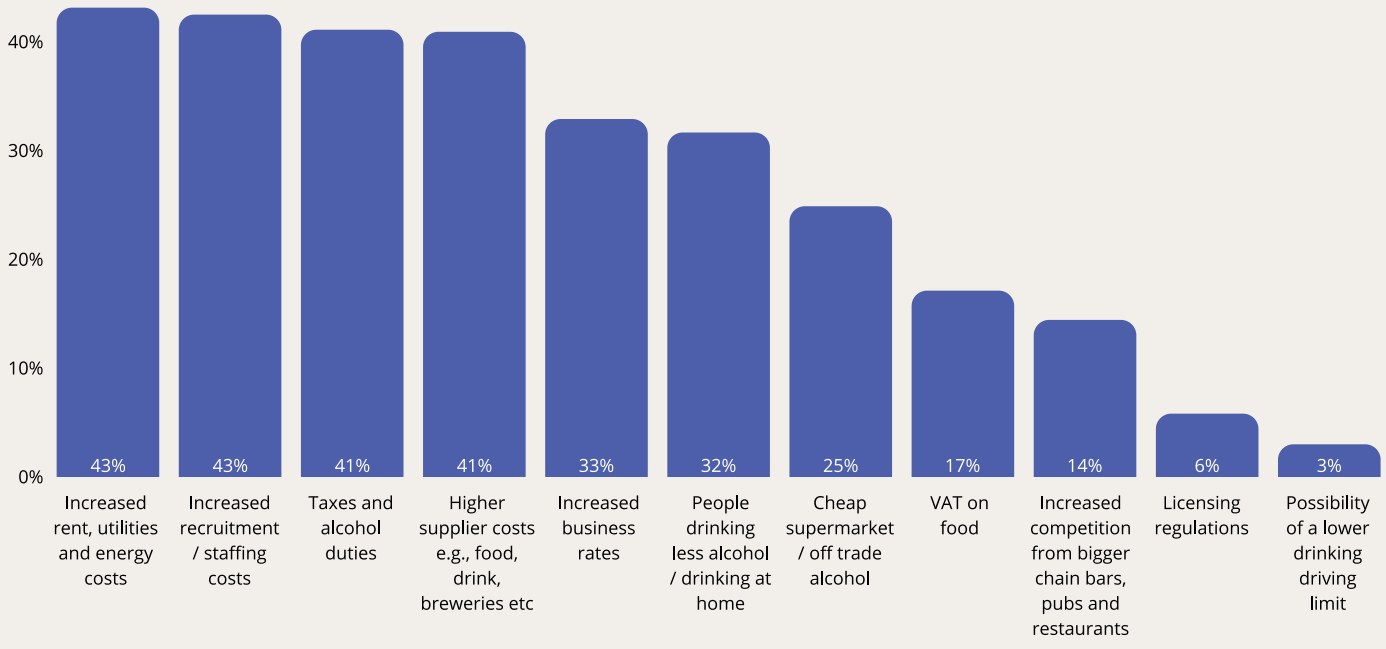
Challenges and support for pubs

Biggest challenges for publicans

Asked to name the three biggest challenges facing their business, publicans painted a consistent picture: rising costs. Increased rent, utilities, and energy costs, and increased recruitment and staffing costs, were each selected by 43% of respondents – the two clear frontrunners. Close behind, 41% pointed to taxes and alcohol duties, and the same proportion to higher supplier costs. A third of publicans (33%) named increased business rates, and almost as many (32%) pointed to people drinking less or drinking more at home. A quarter (25%) cited cheap off-trade alcohol as a leading challenge.

By contrast, regulatory concerns barely registered. Just 6% named licensing regulations as a top-three challenge, and only 3% pointed to the possibility of a lower drink-drive limit, which sits squarely at odds with the case industry bodies have made against licensing and drink-drive reform (we return to this below, in the discussion of the National Licensing Policy Framework).

Out of the following options, what are the three biggest challenges for your business currently?

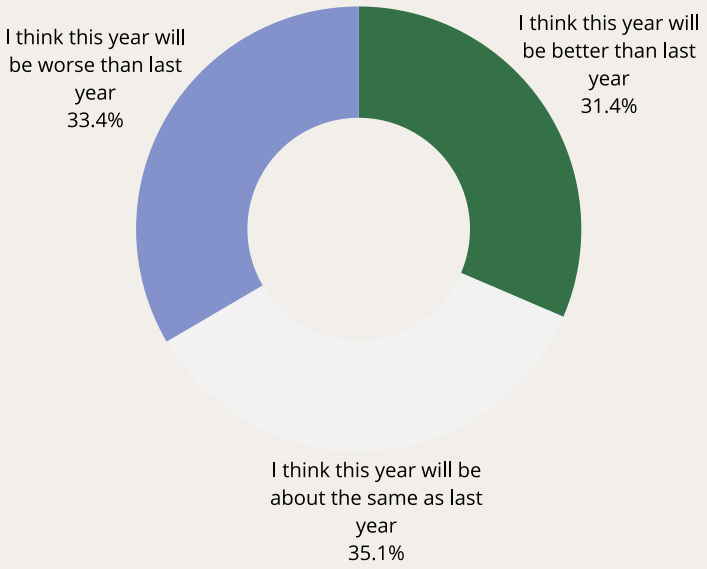


These responses also show significant alignment with the positions taken by health leaders, many medics and health charities. A large share of publicans identified both on-trade alcohol taxes and cheap supermarket alcohol as major challenges – which is really two sides of the same coin, and one that strengthens the case

16. Alcohol Health Alliance (2026), Alcohol Marketing webpage.
17. IAS (2026), Now you see it, now you don't: How alcohol industry interference made marketing restrictions disappear from the 10 Year Health Plan in England.

for treating the on- and off-trade differently in policy terms. Alcohol duty is the most direct lever government has for doing this, and it is, in fact, already being used that way, if only modestly. When alcohol duty was reformed in 2023, the government introduced Draught Relief – a lower rate of duty for qualifying draught products, applied only in the on-trade. That reform established the principle that duty rates can be targeted specifically at where alcohol is sold, protecting most on-trade products while leaving the off-trade rate untouched. The public health case for going further is the same one publicans are making from a commercial angle: narrowing the price gap between supermarket alcohol and pub alcohol would help move drinking back into a regulated, socially beneficial setting. Government could do this by increasing off-trade duty rates more significantly, while extending Draught Relief further to keep pub prices in check.

How optimistic do you feel about the future of your business, financially?

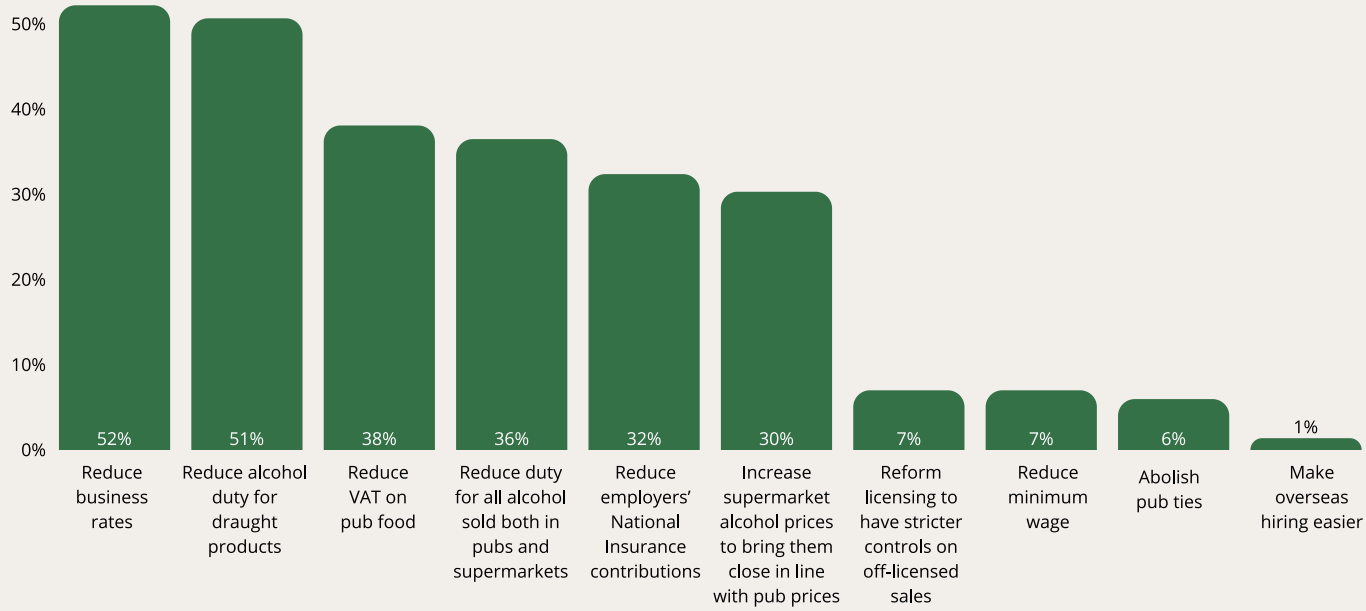


Set against this backdrop of rising costs, it's perhaps unsurprising that publicans are cautious about the future. Views on the year ahead were almost perfectly split three ways: 31% expect business to be better than last year, 35% expect it to stay about the same, and 33% expect it to be worse.

What publicans say they need from government

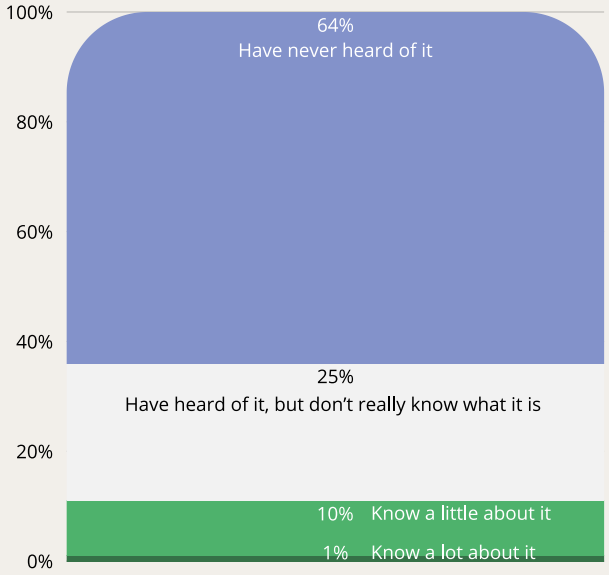
When asked what government could do to support the trade, publicans' answers tracked closely with the challenges they'd just described. Reducing business rates was the most popular measure (52%), narrowly ahead of reducing alcohol duty specifically on draught products (51%) – both, notably, extensions of policy levers government already has in place. Around a third backed reducing VAT on pub food (38%), reducing duty on all alcohol sold in both pubs and supermarkets (36%), and reducing employers' National Insurance contributions (32%). Interestingly, 30% also wanted to see supermarket alcohol prices increased to bring them closer in line with pub prices – a clear echo of the pricing findings above, and further evidence that publicans see the on/off-trade price gap as a business problem as much as a public health one.

Below is a list of things that other people have said that governments might do to support the pub trade. Which of these would you most like to see the government doing to support the pub trade?



In 2025, the government convened a licensing policy 'taskforce', made up largely of alcohol industry trade bodies and pub companies and co-chaired by Greene King's chief executive, to recommend reforms aimed at boosting growth in the hospitality sector. That process fed into the National Licensing Policy Framework (NLPF), published in late 2025. The survey asked publicans directly whether they'd heard of it: 64% had never heard of it at all, and a further 25% had heard of it but didn't know what it involved. Of the remaining 11% who knew something about it, 51% thought it would be helpful to their business, and 33% thought it would not. As this is a small subgroup, this figure should be read with caution.

The government recently issued the National Licensing Policy Framework (NLPF). Which of these best describes what you know about it?



That near-total lack of awareness sits alongside a much sharper critique from public health researchers. The taskforce that produced the NLPF included no representatives from DHSC or from public health bodies, despite public health authorities' formal role as a responsible authority in local licensing decisions.[18] Critics have also pointed out that England and Wales already run one of the most liberal licensing regimes in the world – the only jurisdictions in the world with the option of 24-hour alcohol sales – and that the overwhelming majority of licence applications are already granted, undermining the premise that the system is unduly restrictive. Writing in the journal Addiction, two researchers went further, describing the process as a case of 'regulatory capture': a fundamental reframing of licensing's purpose, from public protection towards business promotion, produced at speed by a group dominated by commercial interests.[19]

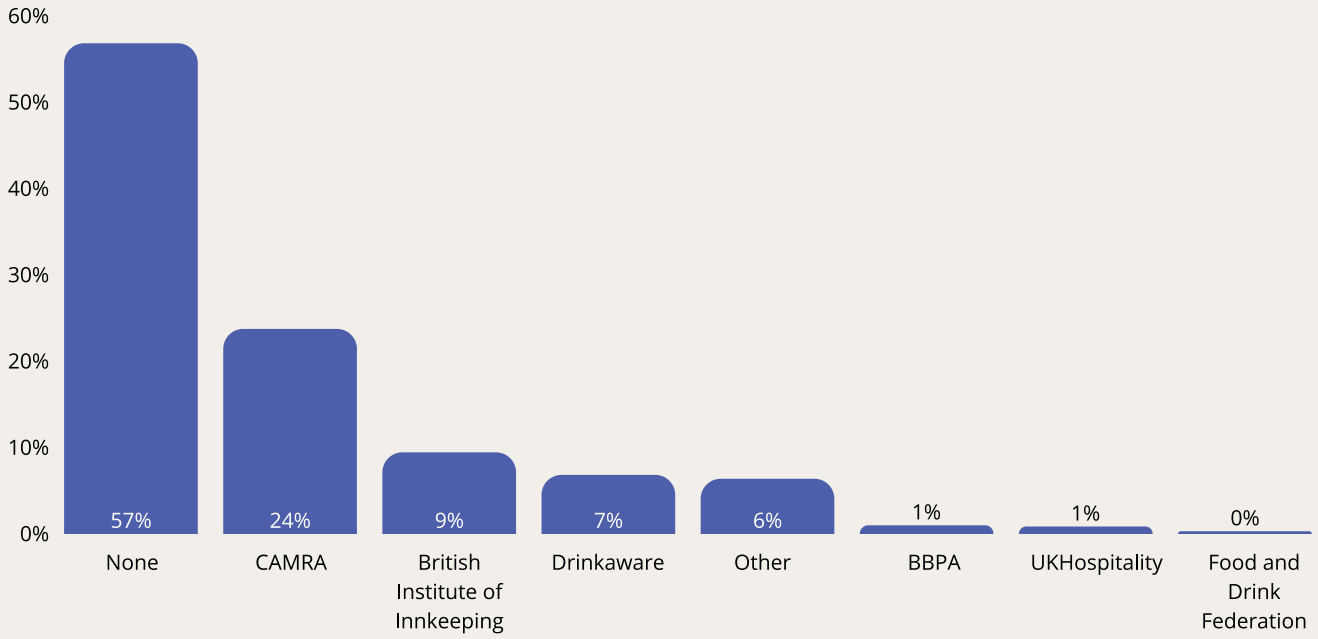
Taken together, the findings suggest the NLPF has, so far, made little impression on the publicans it's meant to support. That fits with the wider pattern in this survey: licensing reform simply isn't where publicans see their problems lying – only 6% named licensing regulations as a top challenge, against the over 40% who pointed to costs. Whatever the government's growth ambitions for the framework, the sector's own priorities look very different.

Who speaks for publicans?

Publicans themselves are strikingly disconnected from the trade bodies that most often claim to speak on their behalf. Just 1% of publicans surveyed for this report are members of the British Beer and Pub Association (BBPA), and 1% of UKHospitality – a reflection of the fact that both operate as company membership bodies, representing pub-owning businesses and hospitality chains rather than individual licensees. By contrast, almost a quarter (24%) said they are members of CAMRA, a consumer campaign group rather than an industry lobbying body.

18. DBT (2025), Licensing policy sprint: joint industry and HM government taskforce report.
19. Nicholls, J., & Fitzgerald, N. (2026). Regulatory capture in UK alcohol licensing policy: The 2025 'licensing taskforce' report. Addiction, 121(1), 5-7.

Are you a member of any trade bodies or organisations?



This matters because the BBPA and UKHospitality are consistently the organisations quoted in the media and consulted by government as 'the voice of the trade' – including on the alcohol policy questions this report covers. Yet the results above show that on several of these questions, the positions taken by those bodies (opposing a lower drink-drive limit, opposing minimum unit pricing, opposing marketing restrictions) don't reflect what the publicans actually running pubs say they think. The gap in membership numbers helps explain why: these organisations are structurally built to represent company interests, not the views of individual licensees.

Conclusion

At a time of record alcohol harm, this report set out to answer a simple question: what do the people actually running England's pubs think about alcohol harm, their businesses, and the policies being debated on their behalf? The answer, consistently, is that across England, from rural pubs to city centre bars, cheap off-trade alcohol emerges as a threat which has changed socialising patterns, as well as harming health. It is clear that this is not the only issue facing publicans – but it shows they are more closely aligned with public health priorities than the industry bodies who claim to speak for them – because a cheaper, less regulated off-trade is a direct threat to their livelihoods. Tougher drink-drive laws, minimum unit pricing, higher supermarket prices, investment in treatment and education: on measure after measure, publicans back the kind of intervention that reduces alcohol harm, often by a wider margin than the general public.

That alignment matters, because it undercuts a story that has gone largely unchallenged in policy debates for years – that what's good for public health and what's good for pubs pull in opposite directions. This survey suggests the opposite is often true, and that the sharper dividing line isn't between health and hospitality, but between the on-trade and the off-trade.

Publicans are not, however, feeling especially heard. Awareness of the government's own flagship licensing reform is close to zero, and the sector's own priorities – costs, staffing, the price of alcohol on supermarket shelves – sit some distance from what has dominated recent policy debate. Closing that gap doesn't require a radical rethink. It requires government to ask publicans what they think more often, and to act on the answers. We hope this report goes some way to doing that.

> "The sharper dividing line isn't between health and hospitality, but between the on-trade and the off-trade."

KEY FINDINGS



Public health and pubs often align

Publicans back MUP (58%), a lower drink-drive limit (75%), and more treatment funding (67%).



The off-trade is the real target

62% of publicans say supermarket alcohol is too cheap; 60% want government to close the price gap with pubs.



Trade bodies don't speak for publicans

Just 1% belong to the BBPA and 1% to UKHospitality, yet these bodies lobby against policies publicans themselves support.

Recommendations

POLICIES TO REDUCE ALCOHOL HARM

The following recommendations are those policies that overlap with the IAS *Healthier Future* report and what publicans called for in this report:

Narrow the price gap between on- and off-trade alcohol through a combination of significantly higher off-trade duty and continued or expanded Draught Relief. This is the single clearest ask to emerge from the data: 62% of publicans think off-trade alcohol is too cheap, a quarter name it as one of their three biggest business challenges, and 60% specifically want government action to bring supermarket prices closer to pub prices – more than any single measure to reduce costs elsewhere in the business.

Introduce minimum unit pricing in England: 58% of publicans support MUP, rising to 79% in the North East, where the policy's effects in neighbouring Scotland are most visible. Support significantly outweighs opposition (14%), making publicans considerably more favourable to MUP than the general public.

Introduce tougher drink-drive regulations: Three-quarters of publicans (75%) support this, against just 8% opposed – including a majority of rural publicans (47% support vs 26% opposed), directly contradicting industry claims that rural pubs would be disproportionately harmed by a lower limit.

Empower local authorities to regulate hours of sale and online deliveries of alcohol.

Invest further in alcohol treatment services and public education campaigns: Two-thirds of publicans backed both greater investment in treatment programmes (67%) and increased spending on education and awareness campaigns (67%) – publicans see prevention and support, not just pricing or enforcement, as part of the solution.

Introduce health warnings on alcohol labels as already planned under the government's 10 Year Health Plan. 52% of publicans support this against 19% opposed, despite industry lobbying against the proposal.

Bring alcohol marketing restrictions in line with those already applied to unhealthy food and drink: Publicans support this by more than two to one (46% vs 17% opposed), even though the measure was dropped from the 10 Year Health Plan after industry lobbying.



SUPPORT FOR PUBS AND PUBLICANS

In addition, publicans called for the following support from government. Although these are not public health measures, if they are used to shift drinking away from the off-trade to the on-trade, there is rationale for them supporting public health too:

Reduce business rates for pubs: This was the single most popular ask when publicans were asked how government could support the trade (52%), and tracks directly with business rates being named a top-three challenge by a third of respondents (33%).

Address the wider cost burden facing pubs: Particularly energy, rent and staffing costs (43% each) and higher supplier costs (41%) – the most commonly cited challenges in the survey. Reducing VAT on pub food (backed by 38% of publicans) and reducing employers' National Insurance contributions (32%) were the next most-supported measures after rates and duty.

Ensure licensing reform reflects what publicans actually say they need: Just 6% of publicans named licensing regulations as a top-three business challenge – far below cost-related concerns – and awareness of the government's National Licensing Policy Framework was almost non-existent (64% had never heard of it). Future licensing reform should be judged against the problems publicans report having, rather than assumed to be a priority on their behalf.

