

Feeling the heat

1 in 3 Only 1 in 3 small pub operators is profitable right now.

24%

feel confident

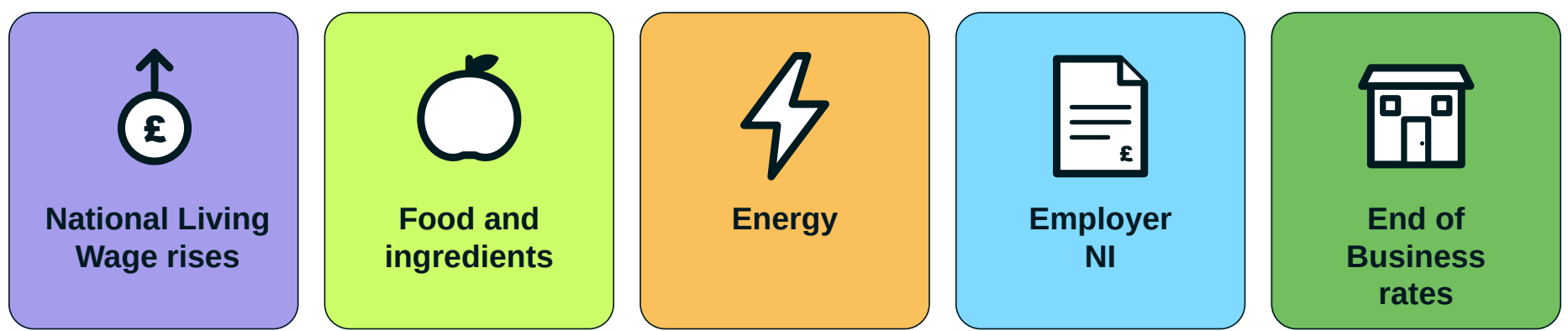
55%

managing but concerned

18%

are questioning viability

Cost pressures are hitting at once.



"70% of our members have taken trading hours and part days out of the shifts."

— Steve Alton, Chief Executive, British Institute of Innkeeping (BII)

Quarterly cash flow gaps are the norm

39% face a cash gap every quarter

3 in 4 shortfalls are between £1,001 and £5,000

Top triggers: equipment costs, seasonal swings, supplier-revenue gap, VAT, payroll

Consumers and employees are paying the prices.

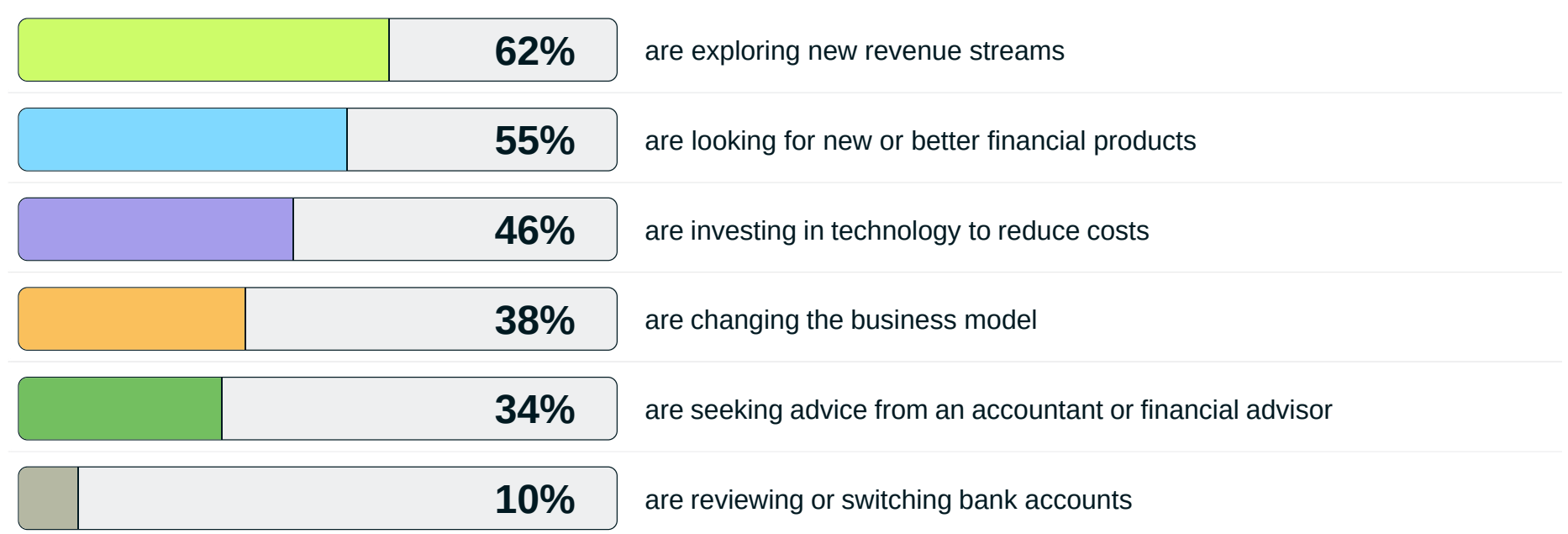
75%

of operators have raised prices

54%

cut staff hours

The sector is resilient and reshaping



Seven habits that separate resilient operators.

- 01 Check cash flow daily to weekly
- 02 Forecast 6–12 weeks ahead
- 03 Use technology to maintain real-time information
- 04 Ring-fence VAT the moment it lands
- 05 Match financing to your trading cycles
- 06 Use customer data to lift slow days
- 07 Get the right accounting partner to guide you

"Hospitality has always been seen as a phoenix industry. One closes, another opens. That assumption no longer holds."

— Henry Poultney, Public Affairs Consultant, NCASS

Survey of 101 micro and small F&B operators in England, March–April 2026, plus expert interviews.