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Sustainability and the UK Pub Industry

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Abstract

The purpose of this paper is to provide an exploratory review of the sustainability agendas being addressed and publicly reported within the UK pub industry. The paper begins with a short discussion of the characteristics of sustainability and this is followed by a brief thumbnail sketch of pubs and pub operating companies within the UK. The paper draws its empirical material from the most recent information on sustainability posted on the UK's leading pub operating companies' web sites. While there is considerable variation in the information the leading pub operating companies publicly provided on their sustainability commitments and achievements this information embraces a range of environmental and social, and to a lesser extent, economic issues. More critically the authors argue that these commitments are driven more by the search for efficiency gains, that they are couched within existing business models centred on continuing growth and that as such the UK pub industry is currently pursuing a 'weak' rather than a 'strong' model of sustainability. The paper provides an accessible review of the sustainability agendas being pursued within the UK pub industry and as such it will interest academics, students and practitioners interested in both the hospitality industry and corporate sustainability.

Keywords: Sustainability; pub industry; UK.

1. Introduction

During recent years the concept of sustainability has consistently moved higher up political, media, investment and public agendas. In reviewing current trends in corporate sustainability strategy and performance Ernst and Young and the GreenBiz Group (2012), for example, argued that 'over the past two decades corporate sustainability efforts have shifted from a risk-based compliance focus where rudimentary, voluntary sometimes haphazard initiatives have evolved into a complex and disciplined business imperative focused on customer and stakeholder requirements.' There is growing awareness that many business leaders increasingly acknowledge sustainability to be becoming one of the drivers of competition, and as a significant source of both opportunity for, and risk to, long term competitive advantage. Elkington (2004), for example, argued that future business success depends on the ability of companies to add environmental and social value to economic value as part of the 'triple bottom line' (TBL), which focuses on 'people, planet and profit' (Elkington 2004).

There is growing interest in sustainability in the hospitality industry (British Hospitality Association undated) but Chen, Sloan and Legrand (2009) suggest that 'for many hospitality managers the daily agenda still focuses on priorities seen to be more important than sustainable business management including cost control, profit maximisation and shareholder value.' However Chen, Sloan and Legrand (2009) argue that in 'the context of globalization, emerging sustainable development concerns and priorities increasingly cut across all areas of management interest and responsibility' and that 'owners, general managers and line managers cannot ignore these developments.' That said Whitbread (2010) asserted that 'tackling climate change and doing more to improve sustainability and resource efficiency are major issues affecting all UK business sectors' but argued that 'the hospitality sector has to date done little to demonstrate meaningful solutions to these challenges.' With this in mind this paper provides an exploratory review of the sustainability agendas and achievements currently being publicly reported within the UK pub industry and it offers some wider reflections on these agendas and achievements.

2. Sustainability

The concept of sustainability can be traced back as far as the thirteenth century but in more recent times it re-appeared in the environmental literature in the 1970's (Kamara et. al. 2006) and since then it has attracted increasingly widespread attention. Diesendorf (2000) has argued that 'sustainability' can be seen as 'the goal or endpoint of a process called sustainable development.' The most widely used definition of sustainable development is 'development that meets the needs of the present without compromising the ability of future generations to meet their own needs' (World Commission on Environment and Development 1987). However defining this concept is not straightforward and a number of different and contested meanings can be identified.

More specifically, there are sets of definitions that recognize that all human beings live on one planet with finite quantities of natural resources and fragile ecosystems on which all human life ultimately depends. There are also much more all-embracing definitions that seek to include ambitious social and economic goals and to meet human needs in

an equitable manner. Typical of the first set is ecological sustainability defined by Callicot and Mumford (1997) as 'meeting human needs without compromising the health of ecosystems' and Sutton's (2004) definition of environmental sustainability as 'the ability to maintain things or qualities that are valued in the physical environment.' The second set is reflected in McCann-Erickson's (2007) definition that 'sustainability is a collective term for everything to do with the world in which we live. It is an economic, social and environmental issue. It is about consuming differently and consuming efficiently. It also means sharing between the rich and the poor and protecting the global environment while not jeopardizing the needs of future generations.'

More critically Hudson (2005) argued that definitions range from 'pallid blue green to dark deep green.' The former definition Hudson (2005) suggests centres on 'technological fixes within current relations of production, essentially trading off economic against environmental objectives, with the market as the prime resource allocation mechanism' while for the latter 'prioritizing the preservation of nature is pre-eminent' (Hudson 2005). Hudson (2005) suggests that the dominant view of sustainability 'is grounded in a blue-green discourse of ecological modernization' and 'claims that capital accumulation, profitable production and ecological sustainability are compatible goals.' Further he contrasts this view with the 'deep green' perspective which 'would require significant reductions in living standards and radical changes in the dominant social relations of production.' In a similar vein a distinction is often made, for example, between 'weak' and 'strong' sustainability and Roper (2012) suggests that 'weak sustainability prioritizes economic development, while strong sustainability subordinates' economies to the natural environment and society, acknowledging ecological limits to growth.'

During the past two decades growing numbers of companies have begun to develop sustainability agendas as an integral component of their business strategies. A number of factors seem to be important in helping to explain this trend. These include the need to comply with a growing volume of environmental and social legislation and regulation; concerns about the cost and scarcity of natural resources; greater public and shareholder awareness of the importance of socially conscious financial investments; the growing media coverage of the activities of a wide range of anti-corporate pressure groups; and more general changes in social attitudes and values within modern capitalist societies. More specifically companies are looking to publicly emphasize their commitment to sustainability in an attempt to help to differentiate themselves from their competitors and to enhance corporate brand reputation.

While sustainability has attracted widespread political support and has become applied in many areas of human endeavour, the concept has also attracted considerable criticism. Robinson (2003), for example, has summarized three sets of criticisms. Firstly, that the concept is vague in that it means very different things to different people and organizations. Secondly that it attracts hypocrites who use the language of sustainability to promote and defend unsustainable activities. Thirdly that it fosters delusions in that it fails to recognize that the current rates of economic growth are simply unsustainable and that it draws attention away not only from the need to develop new ways of organising how people can relate to the natural world but also from the need for fundamental and widespread social and political change. More generally it is important to recognise that a number of critics see the growing business interest in sustainability as little more than a thinly veiled and cynical ploy, popularly described as 'green wash', designed to attract environmentally conscious consumers, while sweeping pressing environmental and social concerns under the carpet. These arguments suggest a focus on sustainability might be characterized by what Hamilton (2009) describes as 'shifting consciousness' towards 'what is best described as green consumerism.' This he sees as 'an approach that threatens to entrench the very attitudes and behaviours that are antithetical to sustainability.'

As interest in sustainability has gathered momentum so a number of attempts have been made to develop theoretical frameworks connecting nature and society and to emphasise that social and economic development cannot be viewed in isolation from the natural environment. Amsler (2009), for example, has argued that 'the contested politics and ambiguities of sustainability discourses' can be embraced to develop a 'critical theory of sustainability.' She further argues that current debates should be located 'within a broader tradition of social criticism' and that 'competing interpretations of sustainability' should be viewed as 'invitations to explore the complex processes through which competing visions of just futures are produced, resisted and realized.' Castro (2004) has sought to lay the foundations for a more radical theory of sustainability by questioning the very possibility of sustainable development under capitalism and arguing that economic growth relies upon the continuing and inevitable exploitation of both natural and social capital.

3. Pubs and pub operating companies within the UK

While the roots of the "public house" or pub within the UK can be traced back to the twelfth century the term itself seems to have been first used in the seventeenth century and the modern pub dates from the late nineteenth century. Within the UK there are an estimated 50,500 pubs and they include a wide range of styles and sizes and generate a turnover of some £21,000 million (Mintel 2012). Traditionally the pub market was concentrated and vertically integrated with a small number of large brewers controlling retail sales. In the late 1980s, for example, just six national brewers accounted for 75 per cent of all beer production and owned some 57 per cent of all pubs, the remainder being owned either by regional and smaller local breweries or by individuals. The brewery owned pubs fell into two

categories namely managed houses where the publican and his/her staff were employed directly by the brewery and tenancies where the publicans rented the pub from the brewery. Traditionally pubs were dominated by an exclusive supply system, the so-called “tied system”, which linked them financially and operationally to the breweries. Under this system the breweries supplied not only the managers and the tenants of the pubs they owned but also many of the independent pubs, which were often effectively tied to the brewery by business development loans made at minimal rates of interest in return for an exclusive supply contract.

In 1989 a Monopolies and Mergers Commission report led to a major restructuring of the industry and in substantially breaking the “tied system” produced a much clearer division between brewing and pub retailing. Under the resulting “beer orders” the large breweries were required to sell half of all the pubs they owned above a 2,000-pub limit. In the event the majority of the large brewers moved out of pub ownership and while a number of regional breweries took the opportunity to grow their pub portfolios and many independent publicans continued to trade, the most marked structural change was the growth of a relatively small number of large “pub companies”. These companies own the pubs and issue leases to individuals or multiple companies to operate them. At the time the research for this paper was undertaken seven large companies each owned over 1,000 pubs within the UK and between them accounted for some 36% of all pubs. The overall market structure that has emerged since the introduction of the “beer orders” has been characterised by a number of corporate sales and purchases and the market remains dynamic. More specifically recent years have witnessed a major decline in the number of pubs with the closure of over 7,000 outlets and the turnover of the pub industry contracting by some 30% during the period 2006-2011 (Mintel 2012). The decline of the pub industry is generally ascribed to a number of legislative, fiscal and economic factors which have led to customers increasingly purchasing alcohol from retail outlets and particularly from supermarkets and drinking increasingly at home.

Pubs come in a wide variety of sizes and styles and some of the large operators offer a range of formats. Mitchells & Butlers, one of the largest pub companies, for example, trades under a number of brand banners including O’Neils (Irish style bars), All Bar One (described as ‘sophisticated chic in the heart of town’), Vintage Inns (Traditional country pubs and restaurants) and Crown Carveries (offering carvery food in a community pub setting). The growth of the JD Wetherspoon’s pub portfolio has been characterised by the conversion of a wide array of buildings, including banks, car showrooms, cinemas, theatres, post offices, supermarkets and railway stations. More generally pubs have traditionally been classified in terms of their trading and customer characteristics and a typical classification might include the following pub types. The basic local, community pubs concentrating on the beer sales, often described in the industry as the wet trade, and generally located in high density residential areas; the up-market local located in low density residential areas and offering quality food; the young local which concentrates on customers in the age range 18-30, has pool tables and offers chart music and video screens; chameleon pubs which are located in town and city centres and which offer a subdued coffee bar environment during the day and a vibrant young people’s bar at night; and venue pubs which are wet trade led and which draw their clientele from a wide catchment area because they offer live music events or entertainers, such as ‘stand-up’ comedians.

4. Frame of reference and method of enquiry

In order to obtain a preliminary overview of the extent to which the UK pub industry is publicly addressing the challenge of sustainability the leading pub operators, as identified by Mintel (2012), namely Mitchell & Butlers; JD Wetherspoon; Spirit Pub Company; Greene King Retail and Greene King Pub Company; Marston’s Inns and Taverns and Marston’s Pub Company; Enterprise Inns; Punch Taverns; Scottish and Newcastle Pub Company; and Admiral Taverns Group Holdings, were selected for study. As leading operators in the sector they can be expected to reflect cutting edge thinking and practice. During the past decade ‘sustainability reporting has evolved from a marginal practice to a mainstream management and communications tool’ (Global Reporting Initiative 2007). Capriotti and Moreno (2007) have argued that ‘in a short time the Internet has become an essential tool for organisational communication’ and Bowen (2003) has suggested that the majority of large companies have realised the potential of the World Wide Web as a platform for reporting sustainability agendas and achievements and has argued that its interactivity, updatability and its ability to handle complexity adds value to the reporting process. With this in mind the authors undertook an Internet search for material on sustainability on each of the selected pub operators’ web sites in September 2012 employing Google as the search engine.

The information revealed by this search provided the empirical information for this paper. The specific examples and selected quotations from the selected websites cited within this paper are used primarily for illustrative rather than comparative purposes, with the focus being on conducting an exploratory examination of the current sustainability issues being addressed within the UK pub industry rather than on providing a systematic analysis and comparative evaluation of sustainability policies and achievements of the leading operators. In undertaking this examination the authors used the conventional ‘three pillars’ of sustainable development, namely environment, society and economy with which to group specific sustainability issues. In discussing the reliability and validity of information obtained from the Internet Saunders et.al. (2009) emphasise the importance of the authority and reputation of the source and the

citing of a contact individual who can be contacted for additional information. In surveying the leading pub operators the authors were satisfied that these two conditions were met.

5. Findings

The Internet search revealed that there is considerable variation in the information the leading pub operators publicly provided on their sustainability agendas and achievements. Three of the selected operators namely Mitchell and Butlers, Marston's and Greene King published corporate social responsibility reports which outline the companies; sustainability commitments, agendas and achievements, while the other pub operators provide some information on their approach to sustainability. The majority of the selected pub operators provide some information on their commitment to environmental sustainability. Marston's, for example, claims to 'operate in an environmentally responsible way to protect and enhance our people, brands and communities and are committed to supporting environmental sustainability and bio-diversity.' Enterprise Inns 'recognises its responsibilities to achieve good environmental practice and to continue to strive for improvement in areas of environmental impact.' Scottish and Newcastle emphasises its belief that 'it has a responsibility to achieve excellent environmental standards' recognises 'that good environmental performance is good business practice' and it claims 'we take our environmental responsibilities seriously and are committed to continuous environmental improvement and understand that the efficient and effective use of resources is critical in reducing our impact on the environment.' The company reports that its Environmental Sustainability Steering Group disseminates environmental advice to its lessees through its in-house magazine which is distributed to all employees.

The evidence to support these commitments is principally focused upon three sets of issues namely carbon management and energy efficiency; water conservation; and waste management and recycling; but other issues include pollution prevention; biodiversity; responsible sourcing; and construction. Mitchell and Butlers reports that its 'established energy management programme remains a key priority' and that the company will 'continue to focus on ensuring that energy efficiency and carbon reduction is a fundamental part of everyday business activities.' The company's 'energy reduction process' is designed to manage 'energy resources and drive down consumption levels' and energy saving initiatives include the introduction of light emitting diode lighting and automated equipment controls, the use of external ambient air to maintain cellar temperatures and loft and pipe work insulation. In a similar vein the Spirit Pub Company reports that in recent years it has achieved a 13% reduction in its carbon footprint and savings of £6 million in energy consumption and that by 2012 smart meters had been installed in 98% of its pubs and the corresponding figure for installing energy efficient light bulbs was 86%.

Within the pub industry there is awareness of the increasing importance of water management and conservation. The Greene King Pub company, for example, reported that a reduction in water usage had been one of its 'environmental priorities' during 2011-2012 and that water usage had fallen by some 3% during that period despite an increase in the number of the company's managed outlets. Marston's reports that its attempts to reduce water consumption within its portfolio of managed pubs has been complicated by problems in obtaining accurate data on water usage for individual pubs but provides details of the installation of water saving devices within the toilet facilities of some 240 of its managed and retail pubs. JD Wetherspoon outlines how it is harvesting rainwater and recycling grey water as part of its plan to reduce water usage by 20% by 2020.

Waste management is a key issue for many of the leading pub operators. Marston's, for example, stresses its commitment to reduce, reuse and recycle waste from its portfolio of pubs. The company's recycling initiatives are focused on three waste streams namely glass; card; and reused cooking oil. The company describes its 'Environmental Management System' which encourages the segregation of waste and the development of contractual arrangements with waste contractors to improve its pub recycling rates and reports that both glass and card are being recycled in over 80% of its managed pubs. In 2011 Marston's collected almost 23,000 litres of used cooking oil each week from its tenanted and free trade pubs. This oil was then recycled by a specialist contractor into biofuel and sold to yield an annual saving of some £200,000. The Spirit Pub Company acknowledges that while packaging is essential to the safe delivery of drink, food and other consumables it has an impact on the environment but reports making 'significant progress in reducing our landfill waste with the launch of a new recycling scheme' which it claims 'not only minimises our impact on the environment by reducing landfill but also removes substantial vehicle miles from the road.' More specifically the company reports that 4,000 tonnes of food waste per annum now goes to anaerobic digestion to create green power, 83% of its pubs have had glass recycling units installed and that 100% of its waste cardboard and some of its tin and plastic waste is recycled via its food distributor.

The selected companies provide albeit limited information on a small number of other environmental issues including responsible sourcing; pollution prevention; biodiversity; and construction. Marston's, for example, emphasises its commitment to 'product stewardship' and reports that it is 'consistently working to develop the sustainability of our supply chain.' To this end the company claims to 'continually review the impact of food sourcing in terms of food miles and the manner in which food is produced' and that 'suppliers must be able to demonstrate full traceability of all products supplied.' Scottish and Newcastle recognises that 'the manufacture of building materials

and the process of building construction can have a negative environmental impact' and reports that its ongoing pub refurbishment programme meets the standards set out in the company's sustainable design guide.

The leading pub operating companies look to demonstrate their commitment to the social dimensions of sustainability across a wide range of issues including responsible retailing; work with local communities and charitable organisations; company employees; and food supply and safety and healthy eating. Responsible retailing, seen to embrace provision of a safe, regulated and controlled environment for the consumption of alcohol, initiatives to promote responsible drinking and to reduce alcohol misuse, the prevention of underage drinking is the most prominent issue. Marston's, for example, reports that 'its pub businesses continue to be signatories to the Portman Group code which supports responsible attitudes towards drinking alcohol' and that the company also 'continues to support both the Drinkaware Trust and the industry's own long term multi-million pound alcohol awareness campaign for smarter drinking 2Why Let Good Times Go Bad?' designed to tackle so called binge drinking amongst 18-24 year olds. The company also reports on its investment in virtual learning tools designed to help employees identify potential underage drinkers. Punch Taverns emphasises its commitment to the responsible retailing of alcohol and claims to 'do all we can to ensure that our pubs are not operating irresponsible drink promotions, serving underage drinkers or those under the influence of alcohol.' Greene King, for example, suggests that one of its current priorities is 'to provide support for schemes appropriate for local areas that wish to use them to address issues around social and health harms.'

Under the banner 'Working with Local Communities' Mitchell and Butler's claims that its pubs are 'the driving force behind many communities across the UK' and that 'we actively encourage our managers to get involved in their local area and become the heart of these communities.' In illustrating this work the company reported that its pubs and customers donated some £260,000 during 2011 to charity including £130,000 to Help for Heroes and £25,000 to the Marie Curie Great Daffodil Appeal. In a similar vein the Spirit Pub company argues that 'pubs are the heart of local communities and the driving force behind many charitable events.' The company reports donations to The Prostate Charity, Help for Heroes and Comic Relief and for local charities in Burton on Trent where the company has its headquarters. Enterprise Inns stresses its commitment to 'the philosophy and ethos of The Prince of Wales's "Pub is the Hub" campaign' which encourages 'rural publicans to diversify and deliver a wider range of services to the communities they serve, ensuring that the pub becomes the heart of the community and continues to thrive as a vital part of village life.'

All the leading UK retailers emphasise their commitment to their employees. J.D. Wetherspoon, for example, reports that it 'takes great pride in providing genuine opportunities for our staff to gain promotion or to follow a career path' and stresses its 'commitment to being a top employer.' Mitchell and Butler's emphasises the importance of its training and development initiatives and claims that it wants 'to provide our employees with great training that ensures that they'll be proficient in the job they do.' The company also reports on supporting its employees to pursue National Vocational Qualifications, Apprenticeship and Advanced Apprenticeship schemes and on the launch of a suite of eLearning modules covering managing security; cash, tax and stock; and managing health and safety. Greene King reports that 'the engagement and well-being of our staff' is a 'key priority' and the company provides outline details of initiatives designed to increase the opportunities for employees to adopt healthy lifestyles and of the introduction of health and well-being questions in the annual employee survey. Marston's claims to treat the health and safety of its employees 'with the utmost importance' and outlines how responsibility for health and safety in the workplace is delegated to operational managers who are seen to be 'best placed to monitor and control safety.' The company also reports that some 50% of its employees work on a flexible part time basis designed 'to suit their personal circumstances' - offering excellent and growing opportunities for students, people seeking to work around child caring responsibilities and people returning to the work environment after a career break.

The Spirit Pub Company stresses its commitment to promote healthy eating and a balanced diet within its pubs and outlines its development of a range of low calorie dishes and its work with the Department of Health to support campaigns to reduce levels of salt and unsaturated fat in meals. Marston's reports on looking to offer 'healthier and more sustainable food choices without compromising quality or value for the customers' and that all its meals are 'free from genetically modified ingredients and monosodium glutamate.' Mitchell and Butler's argues that its customers 'want to know more about the food they eat' and the company claims to be looking to provide more detailed nutritional information to help customers to make more informed choices.

The economic dimensions of sustainability receive limited explicit public attention from the leading pub operators. A number of the selected companies emphasise the employment opportunities they have created. Marston's, for example, reports employing some '13,000 people and offering local employment opportunities throughout England and Wales.' Mitchell and Butler's reports employing some 40,000 people 'making us one of the largest employers in the UK' and creating 2,000 jobs from new openings in 2011 with the creation of a further 3,000 jobs planned for 2012. More generally Enterprise Inns suggests that its 'publicans recognise that by sourcing local fresh produce they not only provide customers with great quality but also support local businesses.'

6. Discussions

Sustainability is attracting attention from the UK's leading pub operating companies which provide some information on their sustainability agendas and achievements though there is considerable variation in the extent, the nature and the detail of that information. Although the majority of the selected companies publicly emphasise their commitment to sustainability several of them also seem to recognise, either explicitly or implicitly, that they are merely at the start of what may be a long and difficult journey towards sustainability and a number of issues merit discussion and reflection. Firstly there are issues about the way in which the UK's leading pub operators currently construct their definition of sustainability. This definition might be seen to be built around business efficiency and the search for competitive advantage and as such can be seen to be driven as much by business imperatives as by any concern for sustainability. Thus while many of the environmental initiatives addressed by the selected companies are designed to reduce energy, water consumption and waste emissions, for example, they also reduce costs. In a similar vein the companies' commitment to their employees focusing for example, on training programmes and health and safety at work all help to promote stability, security, loyalty and efficiency within the workforce and the workplace.

The UK's leading pub operators might thus be seen to have constructed sustainability agendas, which are driven largely, though not necessarily exclusively, by their own commercial interests. The accent being on efficiency gains across a number of environmental and social areas rather than on maintaining the viability of natural ecosystems and reducing demands on finite natural resources. More generally Deloitte (2012) has suggested that most companies select which environmental and social data to report on, and as such effectively determine their definitions of sustainability, 'based on their own intuition and experience' and on 'one-to-one consultations with stakeholders or stakeholder panels.' Deloitte (2012) has further argued that such methods do not help managers establish a relative ranking of sustainability issues 'based upon what matters most to the business' and would such an argument would seem to privilege commercial imperatives in the construction and development of sustainability agendas. This, in turn, echoes Hobson's (2006) argument that rich and powerful groups will construct sustainability agendas that do not threaten consumption, per se, but seek to link them 'to forms of knowledge – science, technology and efficiency – that embody the locus of power' already held by large business corporations. Here Fernando's (2003) assertion that 'capitalism has shown remarkable creativity and power to undermine the goals of sustainable development by appropriating the language and practices of sustainable development' resonates loudly.

Secondly, and both more specifically and more prominently there are a set of issues surrounding what are, in effect, contested interpretations of responsible drinking. On the one hand the alcohol industry, of which pub operating companies are just one element, typically claims to 'produce beverages that are enjoyed by millions, and when consumed responsibly, can be part of a balanced and healthy lifestyle' (International Center for Alcohol Policies 2010). In some ways the alcohol industry's position on alcohol abuse is to view it as a minority problem associated principally with underage and binge drinking and alcohol related driving offences. As such pub operating companies might be seen to take a partial and an idiosyncratic view of what constitutes irresponsible drinking. On the other hand there is growing political, medical and public concern about excessive alcohol consumption and about its costs and consequences to society. A report produced by Alcohol Concern, the UK national agency on alcohol misuse, for example, argued that 'despite an increasing awareness of its dangers among both the media and the medical profession, alcohol misuse remains a serious and growing public health issue in the UK' (Alcohol Concern 2011). The report further suggests that there is 'an unsustainable burden of alcohol misuse' and that 'for a significant and growing number of people in England alcohol abuse is a major cause of ill health contributing to a wide range of serious health problems and accidents that require health care' and that 'alcohol abuse is now estimated to cost the National Health Service £2.7 billion a year, almost twice the equivalent figure in 2001.'

However the ability of the leading pub operating companies to encourage and promote responsible drinking faces complex cultural challenges and it is highly constrained by other elements in the supply chain, notably beer and spirits producers, the major retailers and the owners of nightclubs. Hunt et. al. (2010) have argued that within the UK 'the major retailers of alcohol have a relatively stronger bargaining position than producers of alcohol and are therefore able to negotiate for prices and volume in their favour.' This can allow the leading retailers to offer a variety of low price alcohol promotions that can in turn be seen to encourage alcohol consumption. In a similar vein the 'Happy Hours' and cheap drinks' promotions associated with televised sporting fixtures common in many pubs and clubs have attracted sustained criticism from a range of stakeholders including politicians, the police, medical authorities and the Church of England.

The contested interpretations of responsible drinking and the growing concerns about the public costs of excessive alcohol consumption outlined above casts the tension between statutory government regulation and industry self-regulation into increasingly sharp relief. The alcohol industry has traditionally stressed the importance of self-regulation typically arguing that 'self regulation can be more prompt, flexible and effective than government regulation' and that 'it can permit application of the accumulated judgement and experience of an industry to issues that are sometimes difficult for government to define' (Federal Trade Commission 1999). While Baggott (2006) suggests that 'many observers, including those outside the industry, accept that self regulation has a role to play in

preventing alcohol abuse' he argues that 'despite some good practice, several shortcomings have been identified.' These include 'weaknesses in enforcement and implementation, limited independent input and public accountability, and a lack of comprehensive coverage, leaving important areas under-regulated' (Baggott 2006). At present the UK's current Coalition Government, for example, is developing its legislative approach to the alcohol industry but the previous Labour Government's approach was largely to avoid introducing stronger statutory legislation on alcohol consumption and to work in partnership with the alcohol industry, to encourage it to strengthen its own standards and to contribute financially to educational and marketing initiatives. In criticising this approach Hall (2005) suggests that the alcohol industry has proved to be the dominant partner arguing that the 'UK government's new alcohol policy ...shows all the hallmarks of regulatory capture, in that it embraces the industry's diagnosis and preferred remedies for the alcohol problem.'

Thirdly there are widespread concerns about the scale and the impact of continuing pub closures on local communities. In some ways these concerns often seem more pointed in rural areas and Action with Communities in Rural England (ACRE), the pressure group that supports sustainable rural development, has argued that 'the position of pubs..... in rural areas and their local communities appears bleak' (ACRE 2012) but similar concerns are increasingly being expressed in a growing number of towns and cities. The Greyhound and the Cat and Fiddle, for example, the only two pubs on the large Whaddon former local authority housing estate in Cheltenham closed in 2010 reducing the provision of social and sporting amenities and fracturing many long standing social relationships. The Institute for Public Policy Research (2012) has argued that pubs 'provide a meeting place where social networks are strengthened and extended', 'inject an average of £60,000 into their local economy', are 'the most important social institution for promoting interactions between people from different walks of life' and are 'becoming hosts for a range of important public services, including post offices and general stores' and as such can be seen to epitomise the spirit of sustainability. A range of initiatives have been launched, including the Prince of Wales' 'Pub is the Hub' campaign mentioned earlier, and the Campaign for Real Ale's (CAMRA) 'Local Pubs Campaign' (CAMRA 2012a), the new National Planning Framework (Department of Communities and Local Government 2012) would seem to offer some protection against continuing pub closures and CAMRA has called for the Government to introduce 50% business rate relief for pubs which are at the centre of their community (CAMRA 2012b). However there is general consensus around the belief that 'there is no magic bullet that will reverse the tide of pub closures' (Institute for Public Policy Research 2012).

Fourthly and more generally given the wide range of sustainability agendas and issues being pursued by the leading pub operators it may not always be easy to align what will sometimes be competing and contradictory strategic goals. At the strategic level, for example, Marston's commitment to 'embed commercially sound corporate responsibility practices within all our operations' and decisions associated with this commitment may threaten other commitments, for example, 'offering customers healthier and more sustainable food choices', that 'the goods we buy are produced ethically and are socially and environmentally sustainable.' At the pub level managers who are working to meet what may be ever more demanding operational and financial targets and/or to achieve performance related bonuses may, for example, when facing problems in staff scheduling, put employees under pressure to work outside the hours that suit their work/life balance or refuse to release employees for training programmes. These tensions are common to many large companies looking to publicly pursue wide ranging sustainability agendas while driving forward ambitious commercial agendas and looking to deliver growth in earnings and dividends. However they are at least partly exacerbated, in the pub industry in that, as outlined earlier, some of the leading pub operators have a large portfolio of leased and tenanted rather than directly managed pubs. Thus while Enterprise Inns, for example, recognises that 'it can play a part in leading and influencing all our publicans', it is at least, one step removed from direct corporate control.

Fifthly there are a set of issues concerning the way the UK's leading pub operating companies report on, and provide information on, sustainability. Generally the accent is on providing a simple narrative of their sustainability agendas and achievements, sometimes illustrated with basic statistics, micro case studies and links to newspaper articles with pictures and simple diagrams being widely used to illustrate general themes. All the leading pub operating companies provide information on their sustainability agendas and achievements in their own idiosyncratic house style and there is no evidence that they employ external guidelines to inform the reporting process. There is no reference, for example, to the Global Reporting Initiative (2007) guidelines which are now an increasingly common feature in sustainability reporting by UK companies. Overall the lack of common and agreed frameworks and standards and the use of simple case studies make it difficult not only to make any meaningful comparison between one pub operating company and another but also to assess the contribution that these companies are making towards the achievement of national sustainability targets. At the same time there is no evidence of any independent external assurance of the information on sustainability posted by the leading pub operating companies. This lack of independent external assurance can be seen to undermine the transparency, reliability and integrity of the sustainability information posted by the selected companies. That said it is important to remember that these companies are large, complex and dynamic organisations. Capturing and storing comprehensive information and data across a large pub portfolio and throughout their supply chains and then providing access to allow external assurance is a challenging and a potentially costly venture and one which the majority of the leading pub operating companies currently demonstrably choose not to publicly pursue.

Finally there are broader and more fundamental tensions between commitments to promoting sustainability and the pursuit of continuing economic growth. On the one hand the leading pub operating companies' position on sustainability and growth might be seen to be epitomised by Greene King, for example, in that it reports 'our strategy delivering attractive and sustainable growth.' This approach is certainly consistent with the argument by Reisch et al. (2008), that while moving towards sustainability is a major policy agenda, 'growth of income and material throughput by means of industrialisation and mass consumerism remains the basic aim of western democracy.' On the other hand there are arguments that economic growth, dependent on the continuing depletion of the earth's finite natural resources, is incompatible with sustainability. This is epitomised by Jackson's (2006) belief that 'the consumption patterns that characterise modern Western society are unsustainable. They rely too heavily on finite resources and they generate unacceptable environmental costs.' More radically Jackson (2006) has argued that 'it is entirely fanciful to suppose that deep emission and resource cuts can be achieved without confronting the structure of market economies.' This, in turn, echoes Dolan's (2002) belief that 'the goal of sustainable consumption needs to be seen as a political project, recognising the power relations between social groupings and between cultural value systems' and his ominous warning that 'this is the context within which the idea of sustainability will stand or fall.'

7. Conclusions

This exploratory review of the UK pub industry reveals that there is considerable variation in the amount and detail of the information the leading pub operating companies publicly provide on their commitment to sustainability. While these commitments embrace a range of environmental and social, and to a much lesser extent, economic issues, they can be interpreted as being driven as much by business imperatives as by a genuine and deep-seated concern for sustainability. Thus the accent is upon making efficiency gains principally across a number of environmental issues rather than on maintaining the viability and integrity of natural ecosystems and on reducing demands on finite natural resources. As such the UK pub industry might be seen to be pursuing a 'weak' rather than a 'strong' model of sustainability. More critically, the authors suggest that the leading pub industry's commitments to sustainability are couched within existing business models focused on continuing growth. As such this echoes Roper's (2012) belief that weak sustainability represents 'a compromise that essentially requires very little change from dominant economic driven practices but effectively works to defuse opposition, increase legitimacy and allow business as usual.' As such the UK pub industry might attract increasing criticism from those who are concerned about what Jackson (2009) has described as 'an emerging ecological crisis that is likely to dwarf the existing economic crisis.'

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