

Survey of Licensed Premises in Ireland 2004



A Report Commissioned by the Drinks Industry Group



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Drinks Industry Group of Ireland

By Anthony Foley

Dublin City University Business School

(Survey Carried Out by Economic and Social Research Institute)



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A Survey of Licensed Premises 1994, 1995

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Foreword

This is the fifth Survey of Fully Licensed Premises commissioned by the Drinks Industry Group of Ireland; the first one was undertaken in 1984 and it has been carried out at intervals of five years since then. This current survey was undertaken with a four year interval given the importance of the data and its relevance to policy making for the industry. The current survey was undertaken mainly in Autumn 2003. A small amount of follow-up was carried out in early 2004.

A survey of Off-Licence Premises was incorporated in the 1999 Survey in order to more fully take account of the valuable contribution which this sector makes to the industry and to the Irish economy. This time however this survey is confined to on-licensed premises and a separate survey of off-licenses will be published later this year.

Almost all of the material presents an update of that appearing in previous reports. This is done in order to assist in establishing trends in crucial variables. Information on issues such as the gender and age profile of staff, the changing scale of retailing space, and issues including the 'right to refuse' were introduced in the 1999 Survey and are retained here.

As in previous years, the questionnaire was designed in consultation with the members of the DIGI, and the survey was implemented by the Economic and Social Research Institute who assembled the data for the analysis. In this respect, grateful thanks are extended to James Williams and Bernadette Ryan, ESRI for their assistance. Thanks are also due to Yvonne Scott of Trinity College Dublin who was responsible for earlier surveys. The questionnaire, sample frame (updated) and methodology are the same as the 1999 survey.

The terms of reference for this report were to conduct a sample survey of fully licensed premises in the Republic of Ireland. This involved an interview survey of fully licensed premises drawn from a population of over 11,000 premises; 949 premises were approached for the survey, giving rise to 710 successfully completed interviews. The survey represents the most comprehensive scientific survey of this important sector ever undertaken in Ireland.

The questions raised cover a wide range of important data and have given rise to a substantial body of statistical material providing a range of information on the nature of activities, the ownership and family involvement of businesses, factors of location and opening times, the extent and nature of employment, the significance of, and trends in sales, the scale of costs, the size of establishments, the expenditure on refurbishment, the range of ancillary services and issues of current concern to premises. These data provide important material for a range of interested individuals and concerns - from the businesses themselves, to the policy makers whose decisions impact on them. The presentation of the material concentrates on the 2003 data. Extensive longitudinal analysis can be undertaken by referring to previous DIGI surveys. However, the report refers in some cases to earlier periods.

Any errors are the responsibility of the author. Any views expressed are the personal views of the author and do not represent Dublin City University Business School or DIGI.

Anthony Foley
July 2004

Summary of Main Findings

This brief summary serve to highlight some of the main findings which are contained in the detailed statistical analyses which follow with respect to the Survey of Licensed Premises 2004.

Survey of licensed premises 2004

General

The Survey is based on a sample of 710 respondents selected from a population of 11,559 fully licensed premises. Of these over 70% were primarily public houses and the remainder were other types of licensed premises such as hotel, sports club, restaurant, nightclub and grocery. The majority of public houses do not engage in a second activity. However, of those which do, restaurant, off-licence and grocery are the most common.

The great majority of public houses, 94.6%, are independent owner- or family-run businesses. Other licensed premises are 79.6% independently owned.

The survey contains 710 respondents and represents the most comprehensive analysis of the on-licensed sector ever undertaken in Ireland.

Employment

Employment in licensed premises in Ireland is estimated at 100,220 staff, including proprietors. This represents a substantial increase since the last Survey, of 28.6%. This increase has been

experienced mainly in the full time category which grew by 38.1%. This is different to the 1994/99 change which was mainly at the flexible end of the labour content.

The current employment level is comprised of 47,885 full-time staff, 42,606 part-time, and 9,729 casual staff. Part time refers to employment of 5-21 hours per week. Casual refers to less than 5 hours per week. Proprietors and relatives assisting account for 23.4% of staff, with the remaining comprised of non-family employees. This compares with 28.5% in 1999.

Public houses account for the greatest proportion of employment amounting to 65% or 65,125 of the total in licensed premises (excluding off-licenses), the remaining 35% is accounted for by other types of premises such as hotels, restaurants and clubs. In 1999 pubs provided 72% of the employment.

Employment in Licensed Premises, 1984-2003

| Year | Full-time | Part-time | Casual | Total |
|------|-----------|-----------|--------|--------|
| 2003 | 47885 | 42606 | 9729 | 100220 |
| 1999 | 34673 | 35279 | 7956 | 77908 |
| 1994 | 32100 | 23900 | 4900 | 60900 |
| 1989 | 24740 | 15525 | 3234 | 43499 |
| 1984 | 26718 | 17147 | - | 43865 |

The gender breakdown of overall staff numbers is relatively evenly divided with 55,023 males (55%) and 45,197 females (45%). This is a higher male ratio than in 1999. Among proprietors, however, there are 62% males and full time staff is 61.6% male.

The age profile of staff reveals that, in public houses the predominant age group is 20-35 years with 51.7% of the total. However, there is a greater spread across the different age groups than is the case in other types of premises. In these 62.6% are in the 20-35 age group.



Sales

The average level of turnover per licensed premises is €383,377 (compared with €245,982 in 1999 based on current prices)

The proportion of licensed premises in each turnover range is indicated in the table below which shows that the majority (54.2%) are in the ranges of less than €200,000 per annum. The main report provides a detailed breakdown. Premises in Dublin are generally in much higher brackets than those outside Dublin.

Just over 54% of licensed premises have an annual turnover of less than €200,000 per annum. These premises account for a relatively small proportion (12.1%) of total sales of all premises. The percentage of employment which these premises account for is 32.7%.

Percentage of Premises, Sales and Employment in Each Turnover Band

| Net Value of Sales | Percentage of Premises | Percentage of Total Sales | Percentage of Employment |
|---------------------------|------------------------|---------------------------|--------------------------|
| under €30k | 11.0 | 0.9 | 5.1 |
| €30,000 - under €60k | 15.5 | 1.8 | 11.2 |
| €60,000 - under €200k | 27.7 | 9.4 | 16.4 |
| €200,000 - under €400k | 19.8 | 15.5 | 15.1 |
| €400,000 - under €650k | 11.4 | 15.7 | 15.2 |
| €650,000 - under €1 m | 6.4 | 13.8 | 12.2 |
| €1 m - under €1.25 m | 3.2 | 9.4 | 7.8 |
| €1,250,000 - under €2.5 m | 3.3 | 16.1 | 9.2 |
| €2,500,000 - under €4 m | 1.0 | 8.8 | 3.0 |
| €4 m or more | 0.7 | 8.6 | 4.8 |
| Total | 100.0 | 100.0 | 100.0 |

At the other end of the scale, only 5.0% of premises have an annual turnover of €1.25million or over. These premises account for 33.5% of total sales, and 17% of employment. This data is broadly in line with Revenue Commissioner sales data. The concentration level has grown since 1999.

Costs

Wages and salaries represent a significant and growing percentage of net sales for licensed premises. As the table below illustrates, wages and salaries have increased as a percentage of the value of sales and now, for more than 19% of premises, this expense accounts for more than 25% of the value of sales compared with 9.5% of premises in 1999. These costs tend generally to represent a slightly lower percentage of public houses than for other types of premises at the over 25% level.

Wages and Salaries as a Percentage of Net Sales in Licensed Premises, 1989-2003

| Percentage of net Sales | 1989 | 1994 | 1999 | 2003 |
|-------------------------|------|------|------|------|
| Up to 10% | 59.6 | 45.7 | 31.8 | 12.9 |
| 11 to 15% | 22.0 | 25.5 | 21.6 | 20.7 |
| 16 to 20% | 9.0 | 18.3 | 24.1 | 25.7 |
| 21 to 25% | 3.4 | 6.6 | 13.1 | 21.6 |
| Over 25% | 5.9 | 3.8 | 9.5 | 19.1 |

Altogether, about 77% of all premises (about 78% of all pubs) engaged in some form of refurbishment during the last five years, ranging from under €1200 to over €650,000. This is a lower percentage than in 1999. 20% of Dublin pubs spent over €650,000 each.

The scale of the drink retailing space in licensed premises varies considerably, from less than 250 square feet to over 2000 sq. ft. Almost half of premises have drink retailing space in excess of 1,000 s. ft. much higher than 1999. Over the last five years less than a fifth of premises have increased their drink retailing space. This practice has been a little less common in public houses than in other types of premises

Summary of Main Findings

Ancillary Services

Licensed premises provide a variety of drinking facilities. The most common are bar (98.5% of premises) and lounge (76.0%). In addition, 17.0% of premises provide a restaurant, and 25.4% a beer garden. A discotheque is available in 6.0% of licensed premises. These data indicate a decrease in the number of licensed premises offering restaurant and discotheques since 1999.

Over 90% of premises which engage in retail of drinks provide bar food of some type, ranging from crisps, peanuts and snacks to full meals. Among public houses, aside from such snacks as crisps, etc., each of the other varieties of food are more common in Dublin premises than elsewhere.

Most premises which provide food prepare it on the premises (95.3%), while 4.7% use outside caterers.

Over 80% of Ireland's licensed premises offer some form of entertainment and a wide variety is available, ranging from electronic media to live performances to games and competitions. The most prevalent form of entertainment is television/video which is offered in 86.4% of premises.

Most premises engage in some form of activity to encourage business. The most common measure is refurbishment of premises, followed by advertising, and the expansion of in-house entertainment, and introduction/improvement in catering.

Customer Profile

While customers of licensed premises continue to be predominantly male, it is evident that females form a large proportion of the customer base of licensed premises. In 26.8% of premises, females represent half or more of customers. A range of age groups patronises licensed premises.

Tourists are an important source of business (i.e. comprising 15% or over of customers in one-quarter of premises. Tourism is particularly important to the non-pub sector, presumably due largely to the inclusion of hotels in this category. The 15% and over share in this segment is 44.7%.

Entertainment specifically oriented to tourism is provided in 15.7% of premises.

Issues

The right to refuse is considered to be very important to 91% of licensed premises. 100% of public houses consider it to be very important in the Dublin area.

The preferred closing time of licensed premises is 12.00am or later for 32.8% of licensed premises on Monday to Thursday rising to 82.9% on Friday and Saturday. On Sunday, 41.8% would prefer a time of midnight or later. This represents a movement towards earlier closing on Sunday and Monday - Thursday since 1999.

35.6% of licensed premises employ staff who have availed of Cert courses. The incidence of such training is less common among public houses than other types of premises.



Survey of Licensed Premises in Ireland 2004

By Anthony Foley

General

Q. 1 Classification of Premises by Activity

The data is generally presented for pubs and other premises and Dublin and non Dublin pubs.

The sample for the Survey was drawn from a population of 11,559 fully licensed premises. The majority of fully licensed premises are classified as public house (72.9%), while the remainder are primarily engaged in a variety of other activities involving the retailing of drinks. The next largest groups are hotels (8.3%), restaurants (7.6%) and sports clubs (7.3%). The table below provides a breakdown of premises according to their most important, and their second most important, activities.

Breakdown of Licensed Premises by Main Activities

| Type of Premises | Most Important Activity | | Second Most Important Activity | |
|--|-------------------------|--------------|--------------------------------|--------------|
| | No. | % | No. | % |
| public house | 8425 | 72.9 | 1067 | 9.3 |
| grocery | 84 | 0.7 | 615 | 5.3 |
| off-licence | 41 | 0.4 | 793 | 6.9 |
| hotel | 970 | 8.3 | 171 | 1.5 |
| restaurant | 873 | 7.6 | 1853 | 16.1 |
| sports club i.e. gaa club, football club | 846 | 7.3 | 41 | 0.4 |
| night club | 137 | 1.2 | 233 | 2.0 |
| other | 183 | 1.6 | 286 | 2.4 |
| None | - | - | 6473 | 56.1 |
| Total | 11559 | 100.0 | 11532 | 100.0 |

The majority of premises (56.1%) do not engage in a second activity. However, for the other 40% multiple activities can be crucial for their survival. Running a restaurant facility is the second most important activity for 16.1% of all fully licensed premises. An off-licence facility is the second most important activity for almost 800 premises (6.9%). Grocery is also an important secondary activity.

Q. 2 On - and Off-Licence Sales

Among all licensed premises 97.1% of sales take place on-licence with the remaining 2.9% off-licence.

Q. 3 Ownership of Business

The survey found that the majority of premises, 90.6%, are independent owner- or family-run businesses, this has increased since the last survey. 7.8% are part of a chain.

In the case of public houses, a higher percentage - 94.6% - are independently owned. Among other premises, there are 79.6% which are independently owned. Only 5.2% of public houses are part of a chain.

A comparison of public houses in Dublin and elsewhere shows a difference in patterns of ownership. A higher percentage of public houses in Dublin belong to a chain (13.2%) than is the case in the rest of the country (4.2%).

36.3% of independent premises employ a manager. This trend is much more prevalent in Dublin (82.1%) than elsewhere (29.4%). Within public houses 79.7% of Dublin pubs and 21.9% of non Dublin pubs employ managers.

Percentage of Independent Licensed Premises which Employ a Manager

| Location | Public House | Other Premises | Total |
|--------------|--------------|----------------|-------------|
| Dublin | 79.7 | 85.8 | 82.1 |
| Non Dublin | 21.9 | 58.1 | 29.4 |
| Total | 27.8 | 64.3 | 36.3 |

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Q. 4 Opening Hours of Premises

Virtually all premises operate all year round with only a small percentage under 5% opening on a seasonal basis - almost all of which are located outside Dublin.

Also, virtually all public houses are open seven days per week. A tiny percentage open six days a week, and none of those surveyed opened for less.

Q. 5 Location of Premises

Analysis of the distribution of premises geographically shows that 42.2% are located in small towns (less than 10,000 persons), while 21.8% are in cities. A further 19.2% are situated in large towns and the remaining 16.8% in other areas.

There is a significant variance in location between public houses and other types of premises. While 17.7% of pubs are located in a city, for example, a relatively large percentage of other premises, 32.7% are sited in such a location. By contrast, 47.7% of pubs compared with just 27.3% of other premises are found in small towns.

Location of Premises

| Location Of Premises | Public House % | Other Premises % | Total % |
|----------------------|----------------|------------------|---------|
| City | 17.7 | 32.7 | 21.8 |
| Large Town | 18.3 | 21.4 | 19.2 |
| Small Town | 47.7 | 27.3 | 42.2 |
| Open Country | 16.2 | 18.6 | 16.8 |
| | 100.0 | 100.0 | 100.0 |

Employment

Q. 6 (a) Number of Staff

Employment in licensed premises is substantial representing an estimated total of 100,220 staff, including proprietors. 23,496 of these are proprietors and family members, while the remainder are non-family employees. Full-time employment in the trade at 47,885 accounts for 48% of the total.

The economic significance of the industry in recent years has been reflected in employment - the overall numbers engaged in drink retailing are significant and represent a substantial increase since the 1999 Survey when employment was estimated at 77,908 a rise of 28.6%.

Unlike the previous survey the largest increase was in fulltime employment. This grew by 38.1% between 1999 and 2003 while part-time and casual grew by 208% and 22.3% respectively.

The increase in the number of proprietors was 25.4% but assisting relatives declined by 25.2%. The numbers of proprietors increased from 13,558 in 1999 to 17,002 in 2003 (25.4%) - suggesting a rise in partnerships or joint propriety, or a recognition of the role of a spouse or partner. Assisting relatives decreased from 8,683 to 6,494 (-25.5%) over the same period. The highest increase has occurred, therefore, among employees (37.8%).

Within the proprietors category, the biggest increase has occurred among those working part time and casually - the increases were 57.2% and 136.3% respectively over the period. This may reflect a continuation of the 1999 and 1995 positions where a spouse/partner became involved in the running of the business in response to the increased demand.



Employment in Fully Licensed Premises (Public Houses and Other) 2003

| Employment Category | Full-time | Part-Time | Casual | Total |
|---------------------|--------------|--------------|-------------|---------------|
| Proprietors | 12656 | 3233 | 1113 | 17002 |
| Assisting Relatives | 2227 | 2823 | 1444 | 6494 |
| Employees | 33002 | 36550 | 7172 | 76724 |
| Total | 47885 | 42606 | 9729 | 100220 |

Employment in Fully Licensed Premises (Public Houses and Other) 1999

| Employment Category | Full-time | Part-Time | Casual | Total |
|---------------------|--------------|--------------|-------------|--------------|
| Proprietors | 11030 | 2057 | 471 | 13558 |
| Assisting Relatives | 2399 | 3969 | 2315 | 8683 |
| Employees | 21244 | 29253 | 5170 | 55667 |
| Total | 34673 | 35279 | 7956 | 77908 |

Percentage Change in Employment in Fully Licensed Premises (Public Houses and Other) 1999-2003

| Employment Category | Full-time | Part-Time | Casual | Total |
|---------------------|-------------|-------------|-------------|-------------|
| Proprietors | 14.7 | 57.2 | 136.3 | 25.4 |
| Assisting Relatives | -7.2 | -28.9 | -37.6 | -25.2 |
| Employees | 55.3 | 24.9 | 38.7 | 37.8 |
| Total | 38.1 | 20.8 | 22.3 | 28.6 |

It is of interest to classify the data between public houses and other types of business. The total numbers employed in pubs amounted to 65,125. Of these 16,572 (25.5%) are located in Dublin, with the remainder in other parts of the country. The data reveal some interesting characteristics with regard to the nature of employment in the different categories. Most of the proprietors (74.1%) work on a full-time basis, but with a growing part-time component which, as mentioned, may reflect the increasing

involvement, or recognition of status, of partners. In 1999 81% of proprietors worked full-time. Around one third of assisting relatives, and about 41% of employees work on a full time basis.

Comparing the patterns in pubs in Dublin and in other parts of the country indicates that proprietors make up a much greater proportion of the employment in public houses outside of Dublin - 25.2% compared with 12.2% in the Dublin area. This is a reflection of the larger average size of Dublin premises in terms of numbers employed. Another distinctive feature is the much higher percentage of employment which is represented by assisting relatives in pubs outside Dublin (10.7% compared with 2.8% in Dublin), indicating the greater significance of family involvement in the non-Dublin area.

Employment in Public Houses

| Employment Category | Dublin | Non-Dublin | Total |
|----------------------------|--------------|--------------|--------------|
| Proprietors | 2029 | 12225 | 14254 |
| Full-time | 1123 | 9436 | 10559 |
| Part-time | 875 | 1904 | 2779 |
| Casual | 31 | 885 | 916 |
| Assisting Relatives | 459 | 5198 | 5658 |
| Full-time | 276 | 1679 | 1956 |
| Part-time | 142 | 2295 | 2437 |
| Casual | 41 | 1223 | 1264 |
| Employees | 14084 | 31130 | 45215 |
| Full-time | 7086 | 11659 | 18746 |
| Part-time | 5940 | 16179 | 22120 |
| Casual | 1058 | 3292 | 4349 |
| Total | 16572 | 48553 | 65125 |

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Employment in Public Houses

| Employment Category | Dublin % | Non-Dublin % | Total % |
|----------------------------|--------------|--------------|--------------|
| Proprietors | 12.2 | 25.2 | 21.9 |
| Full-time | 6.8 | 19.4 | 16.2 |
| Part-time | 5.3 | 3.9 | 4.3 |
| Casual | 0.2 | 1.8 | 1.4 |
| Assisting Relatives | 2.8 | 10.7 | 8.7 |
| Full-time | 1.7 | 3.5 | 3.0 |
| Part-time | 0.9 | 4.7 | 3.7 |
| Casual | 0.2 | 2.5 | 1.9 |
| Employees | 85.0 | 64.1 | 69.4 |
| Full-time | 42.8 | 24.0 | 28.8 |
| Part-time | 35.8 | 33.3 | 34.0 |
| Casual | 6.4 | 6.8 | 6.7 |
| Total | 100.0 | 100.0 | 100.0 |

Employment in Public Houses in Dublin

| Employment Category | Full-time | Part-time | Casual | Total |
|---------------------|-----------|-----------|--------|-------|
| Proprietors | 1123 | 875 | 31 | 2029 |
| Assisting Relatives | 276 | 142 | 41 | 459 |
| Employees | 7086 | 5940 | 1058 | 14084 |
| Total | 8485 | 6957 | 1130 | 16572 |
| % | (51.2) | (42) | (6.8) | (100) |

Employment in Public Houses Outside Dublin

| Employment Category | Full-time | Part-time | Casual | Total |
|---------------------|-----------|-----------|--------|-------|
| Proprietors | 9436 | 1904 | 885 | 12225 |
| Assisting Relatives | 1679 | 2295 | 1223 | 5197 |
| Employees | 11659 | 16179 | 3292 | 31130 |
| Total | 22774 | 20378 | 5400 | 48552 |
| % | (46.9) | (42.0) | (11.1) | (100) |

The corollary, of course, is that in the Dublin area non-family members of staff and non proprietors represent the bulk of employment, comprising 85% compared to the much lower figure of 64.1% in the rest of the country.

The table below sets out the pattern of employment in public houses in Dublin and elsewhere. In Dublin, just over half of all staff are employed full time (51.2%). Almost 42% are engaged on a part time basis, with the rest (6.8%) working on a casual basis for less than five hours per week. Outside of Dublin, the proportion of staff in the casual category is higher as the tables below illustrate and the full time share is lower.

Total employment in other types of on - licensed premises is estimated at 35,895. Of these, 7,399 (21.1%) are based in Dublin with the remaining 27,696 (78.1%) working outside Dublin.

A percentage breakdown of the data indicates that a slightly greater proportion of staff are proprietors in premises outside Dublin than in Dublin, but that the percentage which are assisting relatives is essentially the same.

In Dublin fulltime staff was 54.3% of total compared with 45.7% outside Dublin.



Employment in Other Types of Licensed Premises

| Employment Category | Dublin | Non-Dublin | Total |
|----------------------------|-------------|--------------|--------------|
| Proprietors | 511 | 2237 | 2748 |
| Full-time | 335 | 1762 | 2097 |
| Part-time | 135 | 319 | 454 |
| Casual | 41 | 156 | 197 |
| Assisting Relatives | 184 | 655 | 839 |
| Full-time | 80 | 192 | 272 |
| Part-time | 104 | 283 | 387 |
| Casual | 0 | 180 | 180 |
| Employees | 6704 | 24804 | 31508 |
| Full-time | 3604 | 10683 | 14287 |
| Part-time | 2537 | 11893 | 14430 |
| Casual | 563 | 2258 | 2821 |
| Total | 7399 | 27696 | 35095 |

Employment in Other Types of Licensed Premises

| Employment Category | Dublin % | Non-Dublin % | Total % |
|----------------------------|--------------|--------------|--------------|
| Proprietors | 6.9 | 8.1 | 7.8 |
| Full-time | 4.5 | 6.4 | 6.0 |
| Part-time | 1.8 | 1.2 | 1.3 |
| Casual | 0.6 | 0.6 | 0.6 |
| Assisting Relatives | 2.5 | 2.4 | 2.4 |
| Full-time | 1.1 | 0.7 | 0.8 |
| Part-time | 1.4 | 1.0 | 1.1 |
| Casual | 0.0 | 0.6 | 0.5 |
| Employees | 90.6 | 89.6 | 89.8 |
| Full-time | 48.7 | 38.6 | 40.7 |
| Part-time | 34.3 | 42.9 | 41.1 |
| Casual | 7.6 | 8.2 | 8.0 |
| Total | 100.0 | 100.0 | 100.0 |

The average number of staff employed in drink retailing per premises is 8.7 comprising 4.2 full-time, 3.7 part-time and 0.8 casual staff. The average per premises is greater for other types of premises, at 11.3, than it is for pubs at 7.7. In 1999 the average size was 7.1 persons.

Average Number of Staff per Licensed Premises

| Employment Category | Public House | Other Premises | Total |
|---------------------|--------------|----------------|------------|
| Full-time | 3.7 | 5.3 | 4.2 |
| Part-time | 3.2 | 4.9 | 3.7 |
| Casual | 0.8 | 1.1 | 0.8 |
| Total | 7.7 | 11.3 | 8.7 |

The average number of staff per public house is much greater for Dublin premises at 17.5 (13.6 in 1999) almost treble the average for premises outside Dublin at 6.5 (5.7 in 1999), reflecting the greater average size of premises.

Average Number of Staff per Public House

| Employment Category | Dublin | Non-Dublin | Total |
|---------------------|-------------|------------|------------|
| Full-time | 8.9 | 3.1 | 3.7 |
| Part-time | 7.4 | 2.8 | 3.2 |
| Casual | 1.2 | 0.8 | 0.8 |
| Total | 17.5 | 6.5 | 7.7 |

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Q. 6 (a) Gender Profile of Staff

The gender breakdown of overall staff numbers is 55,021 males (54.9%), and 45,198 females (45.1%). The 1999 female share was 48%.

The distribution of employees is males, 53.7% and females 46.3%, each group representing in the region of 41,000 and 36,000 staff respectively. It is of note however, that among proprietors, there are much more males 10,587 than females 6,415. Among relatives assisting, there are slightly more females than males.

A breakdown of employment between public houses and other premises shows some diversity. Employment in pubs comprises more males (56.1%) than females (43.9%). In other premises the female share is 47.4%. In both public houses and other premises, the most marked difference occurs at proprietor level. In pubs, 61.7% of proprietors are males, and in other premises, a greater percentage, 65.3% are males. The percentage of assisting relatives, in each case that are females are public houses 51.2% and other premises 44.9%.

Examination of the nature of employment in terms of full-time, part-time and casual positions reveals that the majority of full-time employees are males, whereas more females than males are employed on a part-time and casual basis. Of the total full time employment, 29,505 (61.6%) are males, while 18,380 (38.4%) are females. Slightly more females are part-time as the table shows, and slightly less females (49.6%) than males (50.4%) work on a casual basis.

Employment in Licensed Premises: Breakdown by Gender and Employment Type

| Employment Category | Public House | | Other Premises | | Total | |
|---------------------|--------------|--------------|----------------|--------------|--------------|--------------|
| | Male | Female | Male | Female | Male | Female |
| Full-time | 20366 | 10895 | 9139 | 7486 | 29505 | 18380 |
| Part-time | 13050 | 14286 | 7561 | 7710 | 20611 | 21995 |
| Casual | 3135 | 3393 | 1770 | 1429 | 4905 | 4822 |
| Total | 36551 | 28574 | 18470 | 16625 | 55021 | 45198 |

Employment in Licensed Premises: Breakdown by Gender

| Employment Category | Public House | | Other Premises | | Total | |
|----------------------------|--------------|--------------|----------------|--------------|--------------|--------------|
| | Male | Female | Male | Female | Male | Female |
| Proprietors | 8791 | 5462 | 1796 | 953 | 10587 | 6415 |
| Full-time | 7030 | 3529 | 1304 | 794 | 8334 | 4322 |
| Part-time | 1193 | 1586 | 316 | 138 | 1509 | 1724 |
| Casual | 568 | 347 | 176 | 21 | 744 | 368 |
| Assisting Relatives | 2753 | 2904 | 462 | 376 | 3215 | 3280 |
| Full-time | 959 | 997 | 120 | 151 | 1079 | 1148 |
| Part-time | 1189 | 1248 | 213 | 174 | 1402 | 1421 |
| Casual | 605 | 659 | 129 | 51 | 734 | 709 |
| Employees | 25007 | 20208 | 16212 | 15296 | 41220 | 35504 |
| Full-time | 12377 | 6369 | 7715 | 6541 | 20092 | 12910 |
| Part-time | 10668 | 11452 | 7032 | 7398 | 17700 | 18850 |
| Casual | 1962 | 2387 | 1465 | 1357 | 3428 | 3744 |
| Total | 36551 | 28574 | 18470 | 16625 | 55021 | 45198 |

The table below analyses the gender structure of employment in public houses. As shown, the differential between male and female employment is more marked in Dublin than elsewhere. 32.9% of Dublin public houses employment is female compared with 47.6% in the rest of the country. Overall, 43.9% of all employees are female. In the case of proprietors in Dublin 30.1% are female compared with 39.7 outside Dublin. In the case of full time employees only 15.2% are female in Dublin pubs and 18.2% outside Dublin.



Employment in Public Houses: Breakdown by Gender

| Employment Category | Dublin | | Non-Dublin | | Total | |
|----------------------------|--------------|-------------|--------------|--------------|--------------|--------------|
| | Male | Female | Male | Female | Male | Female |
| Proprietors | 1419 | 610 | 7372 | 4851 | 8791 | 5462 |
| Full-time | 982 | 141 | 6048 | 3388 | 7030 | 3529 |
| Part-time | 406 | 469 | 787 | 1116 | 1193 | 1586 |
| Casual | 31 | 0 | 537 | 347 | 568 | 347 |
| Assisting Relatives | 277 | 183 | 2476 | 2721 | 2753 | 2904 |
| Full-time | 214 | 63 | 745 | 934 | 959 | 997 |
| Part-time | 63 | 79 | 1126 | 1169 | 1189 | 1248 |
| Casual | 0 | 41 | 605 | 618 | 605 | 659 |
| Employees | 9424 | 4660 | 15583 | 15547 | 25007 | 20208 |
| Full-time | 5799 | 1287 | 6577 | 5082 | 12377 | 6369 |
| Part-time | 3182 | 2758 | 7486 | 8693 | 10668 | 11452 |
| Casual | 443 | 615 | 1520 | 1772 | 1962 | 2387 |
| Total | 11120 | 5453 | 25431 | 23119 | 36551 | 28574 |

Q. 6 (b) Age Profile of Full-Time Staff

The age breakdown of staff working in licensed premises is shown in the table below. The largest age-range group is the 20-35 year bracket which accounts for over half of all staff employed in licensed premises, with a further (30.3%) aged 36-50 years. There are some differences in the age distribution of staff between pubs and other premises. As the data in the table show, the age profile of staff in public houses is more widely distributed among the age groups over twenty, and a much higher percentage of pub staff employed are in the older age groups. Altogether 44.9% of staff in pubs are over 35, compared with just 31.9% in other premises; 12.9% of staff in pubs are over 50 years, compared with 4.8% in other types of premises.

Age Profile of Full-Time Staff in Licensed Premises

| Age Profile of Full-time Staff in Licensed Premises | Public House | | Other Premises | | Total | |
|---|--------------|--------------|----------------|--------------|--------------|--------------|
| | No. | % | No. | % | No. | % |
| Under 20 | 1051 | 3.4 | 942 | 5.7 | 1993 | 4.2 |
| 20-35 | 16173 | 51.7 | 10406 | 62.6 | 26578 | 55.5 |
| 36-50 | 10011 | 32.0 | 4509 | 27.1 | 14520 | 30.3 |
| Over 50 | 4026 | 12.9 | 768 | 4.8 | 4794 | 10.0 |
| Total | 31261 | 100.0 | 16625 | 100.0 | 47885 | 100.0 |

The data were analysed further to examine if there was a difference between public houses based in Dublin and elsewhere. Almost half the full time staff in pubs outside Dublin are aged over 35, compared with 36.4% of staff in Dublin pubs. Staff aged over 50 years represent almost 14.5% of non-Dublin employment, whereas in Dublin it is 8.6%.

Age Profile of Full-Time Staff in Public Houses

| Age Profile of Full-time Staff in Licensed Premises | Dublin | | Non Dublin | | Total | |
|---|-------------|--------------|--------------|--------------|--------------|--------------|
| | No. | % | No. | % | No. | % |
| Under 20 | 427 | 5.0 | 602 | 2.6 | 1051 | 3.4 |
| 20-35 | 4974 | 58.6 | 11221 | 49.3 | 16173 | 51.7 |
| 36-50 | 2359 | 27.8 | 7652 | 33.6 | 10011 | 32.0 |
| Over 50 | 726 | 8.6 | 3300 | 14.5 | 4026 | 12.9 |
| Total | 8486 | 100.0 | 22775 | 100.0 | 31261 | 100.0 |

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Q. 7 Change in Employment and Hours Worked in the Last Five Years

While the survey reveals an overall substantial increase in employment, the extent to which this was experienced across the industry is considered also. Almost two-thirds of all premises experienced no change in the level of staffing over the last five years. 13.1% experienced a decrease. Overall, 23.1% of premises increased the level of staff over the period.

There was a marked contrast between the experience of public houses and other premises, with the level of increase substantially greater among other premises (34.1%), than pubs (19.0%).

Change in Employment in Licensed Premises in the Last Five Years

| | Public House % | Other Premises % | Total % |
|--------------|----------------|------------------|--------------|
| Increase | 19.0 | 34.1 | 23.1 |
| No Change | 68.1 | 52.3 | 63.8 |
| Decrease | 12.9 | 13.6 | 13.1 |
| Total | 100.0 | 100.0 | 100.0 |

Among public houses an increase in employment was a little more common among Dublin pubs - 27.7% experienced an increase, compared with pubs outside Dublin, where 22.3% increased the number of employees. 21% of Dublin pubs had an employment decrease while only 11.8% of non Dublin pubs had a decrease.

Change in Employment in Licensed Premises in the Last Five Years

| | Dublin % | Non Dublin % | Total % |
|--------------|--------------|--------------|--------------|
| Increase | 27.7 | 22.3 | 23.1 |
| No Change | 51.3 | 65.9 | 63.8 |
| Decrease | 21.0 | 11.8 | 13.1 |
| Total | 100.0 | 100.0 | 100.0 |

The small net increase of 10% may appear to conflict with the employment trend data earlier in the report but this indicator refers to the number of enterprises.

In addition to the net changes in employment levels, it is useful to consider also the average numbers of hours worked. The table below shows that while most premises experienced no change (65.6%), and some experienced a decrease (12.5%) there was also a significant percentage which increased the average number of hours worked, 21.9%. Pubs had a higher no change share and a lower increase than other premises.

Change in Number of Hours Worked in the Last Five Years: Licensed Premises

| | Public House % | Other Premises % | Total % |
|--------------|----------------|------------------|--------------|
| Increase | 19.6 | 28.2 | 21.9 |
| No Change | 68.0 | 58.9 | 65.6 |
| Decrease | 12.4 | 12.9 | 12.5 |
| Total | 100.0 | 100.0 | 100.0 |

Among public houses, a higher proportion of those based outside Dublin (19.8%) experienced an increase in number of hours worked, compared with Dublin pubs (17.5%). The Dublin pub decrease was twice the non Dublin decrease.

Change in Number of Hours Worked in the Last Five Years: Public Houses

| | Dublin % | Non Dublin % | Total % |
|--------------|--------------|--------------|--------------|
| Increase | 17.5 | 19.8 | 19.6 |
| No Change | 58.8 | 69.2 | 68.0 |
| Decrease | 23.7 | 11.0 | 12.4 |
| Total | 100.0 | 100.0 | 100.0 |



SALES

Q. 8 Net Value of Sales

35.6% of all licensed premises reported an increase in drinks sales. This was particularly marked in premises other than public houses, as the table shows. Over half of non pub premises (52.5%) reported an increase in net sales of drinks, compared with 29.5% of public houses. 25.1% of public houses reported a decrease in sales.

Change in Net Sales in Last Five Years - Licensed Premises

| | Public House % | Other Premises % | Total % |
|-----------|----------------|------------------|---------|
| Increase | 29.5 | 52.5 | 35.6 |
| No Change | 45.4 | 29.7 | 41.2 |
| Decrease | 25.1 | 17.8 | 23.2 |
| Total | 100.0 | 100.0 | 100.0 |

Among public houses, 32.6% of premises in Dublin experienced an increase compared with 29.1% outside Dublin. This is a weaker growth performance than the 1999 survey. It is notable that 40.8% of Dublin pubs reported a sales decline compared with 23% of non Dublin pubs.

Change in Net Sales in Last Five Years - Public Houses

| | Dublin % | Non Dublin % | Total % |
|-----------|----------|--------------|---------|
| Increase | 32.6 | 29.1 | 29.5 |
| No Change | 26.6 | 47.9 | 45.4 |
| Decrease | 40.8 | 23.0 | 25.1 |
| Total | 100.0 | 100.0 | 100.0 |

The distribution of net value of drinks sales in licensed premises is indicated in the tables below. A relatively high proportion of those responding to this question have a low turnover. As the table shows, of these 11.0% returned a turnover of less than 30k. Around one quarter (26.5%) of all premises have total sales amounting to under €60k per annum.

A significant clustering occurs at a modest level of turnover - just under half of all premises have sales levels of between €60k and €400k per annum. The proportion of premises with substantial turnover, i.e. in excess of €1.25 million is very small, just 5.0% of all licensed premises falls into this bracket. A smaller percentage of premises other than public houses enjoy a turnover level in this range.

Comparing the data with those produced by the 1999 Survey indicates that, for both public houses and other premises annual turnover has tended to increase, with fewer premises at the lower level of sales and a higher proportion at the higher end. This is largely to be expected given the change in both volume and value of drink sales.

Net Value of Sales in Licensed Premises in the Last Twelve Months

| Net Value of Sales | Public House % | Other Premises % | Total % |
|-------------------------------|----------------|------------------|---------|
| under €30,000 | 10.4 | 12.5 | 11.0 |
| €30,000 - under €60,000 | 13.4 | 20.8 | 15.5 |
| €60,000 - under €200,000 | 29.0 | 24.7 | 27.7 |
| €200,000 - under €400,000 | 21.3 | 15.9 | 19.8 |
| €400,000 - under €650,000 | 10.5 | 13.7 | 11.4 |
| €650,000 - under €1 million | 6.7 | 5.5 | 6.4 |
| €1 million - under €1,250,000 | 3.3 | 2.9 | 3.2 |
| €1,250,000 - under €2,500,000 | 3.2 | 3.4 | 3.3 |
| €2,500,000 - under €4 million | 1.4 | 0.0 | 1.0 |
| €4 million or more | 0.8 | 0.5 | 0.7 |
| Total | 100.0 | 100.0 | 100.0 |

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A comparison of the level of sales in public houses in Dublin and in the rest of the country reveals that average sales per premises tend to be much higher in Dublin. As the table shows, outside Dublin, a high proportion of premises (27%) has sales of under €60k, compared with 0% (about 8% in 1999) in Dublin. The vast majority - over 90% - of premises outside Dublin have annual sales under €650k, while 34.3% of Dublin pubs fall in this category.

At the other end of the scale, nearly 36% of Dublin public houses, but only 1.3% of pubs outside Dublin report sales of over €1.25million per annum. This reflects the trend for much larger premises in Dublin, with relatively high average staff numbers.

Net Value of Sales in Public Houses in the Last Twelve Months

| Net Value of Sales | Dublin % | Non-Dublin % | Total % |
|-------------------------------|--------------|--------------|--------------|
| under €30,000 | 0.0 | 11.8 | 10.4 |
| €30,000 - under €60,000 | 0.0 | 15.3 | 13.4 |
| €60,000 - under €200,000 | 1.8 | 32.6 | 29.0 |
| €200,000 - under €400,000 | 18.6 | 21.7 | 21.3 |
| €400,000 - under €650,000 | 13.9 | 10.1 | 10.5 |
| €650,000 - under €1 million | 13.2 | 5.8 | 6.7 |
| €1 million - under €1,250,000 | 16.6 | 1.5 | 3.3 |
| €1,250,000 - under €2,500,000 | 24.0 | 0.4 | 3.2 |
| €2,500,000 - under €4 million | 9.1 | 0.4 | 1.4 |
| €4 million or more | 2.9 | 0.5 | 0.8 |
| Total | 100.0 | 100.0 | 100.0 |

Comparing the net value of sales for licensed premises in the last twelve months with respect to 1999 it is evident that the figures are consistent with a general increase in the value of sales. A much smaller percentage of premises are categorised in the lower sales groups than previously. Among public houses located outside Dublin and in Dublin and

among licensed premises other than pubs, there is an increase in the percentages with higher net sales. Nonetheless the very high sales levels still relate to small shares of public houses.

Net Value of Sales in Licensed Premises in the Last Twelve Months Comparison 1999 and 2003

| Net Value of Sales | PUBLIC HOUSES | | | | | |
|-------------------------------|---------------|--------------|--------------|--------------|----------------|--------------|
| | Dublin | | Non-Dublin | | Other Premises | |
| | 1999 | 2003 | 1999 | 2003 | 1999 | 2003 |
| under €30,000 | 3.4 | 0.0 | 18.7 | 11.8 | 29.8 | 12.5 |
| €30,000 - under €60,000 | 4.9 | 0.0 | 17.8 | 15.3 | 7.6 | 20.8 |
| €60,000 - under €200,000 | 9.9 | 1.8 | 28.3 | 32.6 | 23.9 | 24.7 |
| €200,000 - under €400,000 | 9.3 | 18.6 | 27.0 | 21.7 | 22.9 | 15.9 |
| €400,000 - under €650,000 | 17.3 | 13.9 | 6.1 | 10.1 | 6.5 | 13.7 |
| €650,000 - under €1 million | 20.7 | 13.2 | 2.1 | 5.8 | 4.4 | 5.5 |
| €1 million - under €1,250,000 | 17.3 | 16.6 | 0.0 | 1.5 | 2.3 | 2.9 |
| €1,250,000 - under €2,500,000 | 10.4 | 24.0 | 0.1 | 0.4 | 1.5 | 3.4 |
| €2,500,000 - under €4 million | 5.2 | 9.1 | 0.0 | 0.4 | 1.2 | 0.0 |
| €4 million or more | 1.1 | 2.9 | 0.0 | 0.5 | 0.0 | 0.5 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

While public houses are heavily or almost entirely dependent on drink sales for their livelihood, this is not the case for all other types of premises. Drinks sales may, however, make a vital contribution to the survival of many such premises and it is of interest, therefore, to consider the extent of this. The data in the table below indicate the proportion of all sales in the business (including areas of the premises not involved directly in drink sales - such as the food retailing part of a shop, or the bedrooms of a hotel) which are accounted for by drink.



As the table below shows, drink sales account for more than 75% of sales in 38.5% of non-pub premises. This compares with 20.1% in 1999. For a further 6.4% of such premises, it represents more than half of sales.

The alcohol contribution was more significant among Dublin-based premises than for those in other parts of the State as the table below shows. For over half of non pub premises in Dublin, drink sales account for more than 75% of total sales - outside Dublin, around one third have drink sales of this significance.

Drink Sales as a Percentage of Total Sales in Premises Other than Public Houses

| Drink Sales as a % of Total Sales | Dublin | Non-Dublin | Other Premises |
|-----------------------------------|--------------|--------------|----------------|
| Up to 15% | 13.9 | 19.9 | 18.5 |
| 16 to 25% | 8.7 | 16.1 | 14.4 |
| 26 to 50% | 23.7 | 21.7 | 22.2 |
| 51 to 75% | 1.4 | 7.9 | 6.4 |
| More than 75% | 52.3 | 34.4 | 38.5 |
| Total | 100.0 | 100.0 | 100.0 |

Q. 9 Percentage of Net Sales Earned from Alcoholic Beverages

Within the drink retailing part of the various types of licensed premises, sales of drinks may be supplemented by other produces and services. The data here are concerned with the proportion of sales which are accounted for by alcoholic drinks.

For 60.3% of premises, drinks sales accounted for over 85% of sales. For 77% of all premises, drinks sales contributed more than 75% of total sales revenue.

Percentage of Net Sales Earned from Alcoholic Beverages

| Percentage of Net Sales Earned from Alcoholic Beverages | Public House | Other Premises | Total |
|---|--------------|----------------|--------------|
| Up to 5% | 0.6 | 2.4 | 1.1 |
| 6%-10% | 0.3 | 6.9 | 2.1 |
| 11% to 25% | 1.0 | 11.8 | 3.9 |
| 26% to 50% | 2.8 | 11.0 | 5.0 |
| 51%-75% | 10.4 | 12.3 | 10.9 |
| 76%-85% | 16.3 | 17.9 | 16.7 |
| 86%-95% | 29.1 | 14.2 | 25.0 |
| Over 95% | 39.5 | 23.5 | 35.3 |
| Total | 100.0 | 100.0 | 100.0 |

In the drink-retailing section of premises, the sales of drinks not surprisingly were considerably more important in the case of public houses than for other types of licensed premises. For almost 70% of pubs, compared with 38% of other types of premises, drinks sales represent more than 85% of all sales.

The percentage of premises which fall into each turnover band is compared with the relevant percentage of total sales and of employment. As indicated in the table, 54.2% of premises have an annual turnover of less than €200k per annum. However, these premises account for a relatively small proportion, (12.6%) of total sales of all premises. The percentage of employment which these premises account for is 32.6%. At the other end of the scale, 5.0% of premises have an annual turnover of €1.25 million or over. These premises account for 33.5% of total sales, and 17.0 of employment.

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Percentage of Premises, Sales and Employment in Each Turnover Band

| Net Value of Sales | % of Premises | % of Total Sales | % of Employment |
|-------------------------------|---------------|------------------|-----------------|
| under €30,000 | 11.0 | 0.9 | 5.1 |
| €30,000 - under €60,000 | 15.5 | 1.8 | 11.2 |
| €60,000 - under €200,000 | 27.7 | 9.4 | 16.4 |
| €200,000 - under €400,000 | 19.8 | 15.5 | 15.1 |
| €400,000 - under €650,000 | 11.4 | 15.7 | 15.2 |
| €650,000 - under €1 million | 6.4 | 13.8 | 12.2 |
| €1 million - under €1,250,000 | 3.2 | 9.4 | 7.8 |
| €1,250,000 - under €2,500,000 | 3.3 | 16.1 | 9.2 |
| €2,500,000 - under €4 million | 1.0 | 8.8 | 3.0 |
| €4 million or more | 0.7 | 8.6 | 4.8 |
| Total | 100.0 | 100.0 | 100.0 |

For the majority of public houses (60.7%), wages and salaries represent less than 21% of sales. The 1999 figure was 83.3%. This impact of costs tends to be higher in Dublin than elsewhere. In Dublin there are 51.9% of pubs where wages and salaries represent over 20% of sales, whereas outside Dublin, this is the case for just 37.8%. At the other end of the scale - these costs make up less than 10% of sales for only 1.7% of pubs in Dublin, compared with 13.2% outside Dublin.

Wages and Salaries as a Percentage of Net Sales in Public Houses

| Percentage of Sales | Dublin | Non-Dublin | Total |
|---------------------|--------------|--------------|--------------|
| Up to 9% | 1.7 | 13.2 | 11.9 |
| 10%-14% | 17.1 | 21.3 | 20.9 |
| 15% to 20% | 29.3 | 27.7 | 27.9 |
| 21% to 24% | 32.0 | 20.3 | 21.6 |
| Over 25% | 19.9 | 17.5 | 17.7 |
| Total | 100.0 | 100.0 | 100.0 |

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COSTS

Q. 10 Wages and Salaries

The costs of wages and salaries can be substantial and represent a significant percentage of net sales. For 19.1% of licensed premises, these costs represent over 25% of the value of sales, and for 40.7% of premises, they account for at least 20% of the value of sales.

Wages and Salaries as a Percentage of Net Sales in Licensed Premises

| Percentage of Sales | Public House | Other Premises | Total |
|---------------------|--------------|----------------|--------------|
| Up to 9% | 11.9 | 15.7 | 12.9 |
| 10%-14% | 20.9 | 20.2 | 20.7 |
| 15% to 20% | 27.9 | 19.8 | 25.7 |
| 21% to 24% | 21.6 | 21.6 | 21.6 |
| Over 25% | 17.7 | 22.7 | 19.1 |
| Total | 100.0 | 100.0 | 100.0 |

Q. 11 Refurbishment of Premises

The outlay on refurbishment of premises represents a substantial expenditure and investment in premises.

The table below indicates the percentage of licensed premises which have invested in refurbishment at each level. As shown, 77.1% of respondents engaged in refurbishment at some level. For around 5% it was very modest, under €1,200 over the five-year period. However, many premises invested significantly in the décor and structure of their buildings. 27.1% of premises spent €60k or more.

A slightly higher proportion of pubs than other types of licensed premises have invested in refurbishment - 75% of 'other premises' engaged in some form of refurbishment, compared with 78% of pubs. However,



investment at the upper end of the scale - €60k and over was a little more common among other types of premises than among public houses, 29% compared to 26%.

Expenditure on Refurbishment and Decoration over the Last Five Years: Licensed Premises %

| Amount of Expenditure on Refurbishment | Public House | Other Premises | Total |
|--|--------------|----------------|--------------|
| None | 22.1 | 25.0 | 22.9 |
| Under €1,200 | 5.4 | 2.9 | 4.7 |
| €1,200 - under €12,000 | 21.2 | 19.1 | 20.6 |
| €12,000 - under €60,000 | 24.9 | 24.2 | 24.7 |
| €60,000 - under €130,000 | 8.6 | 10.3 | 9.1 |
| €130,000 - under €350,000 | 9.5 | 6.2 | 8.6 |
| €350,000 - under €650,000 | 3.3 | 2.4 | 3.1 |
| €650,000 or more | 5.0 | 9.9 | 6.3 |
| Total | 100.0 | 100.0 | 100.0 |

Among public houses, 87% of Dublin pubs and 77% of non Dublin pubs engaged in refurbishment, Dublin pubs spent more on average than those outside Dublin, i.e. there were greater proportions in the upper brackets, €350k and over. Expenditure of €130k or more was made by 40.8% of Dublin pubs, but by 14.9% of those elsewhere. This would be related to the size of pubs in the different areas.

Expenditure on Refurbishment and Decoration over the Last Five Years: Public Houses %

| Amount of Expenditure on Refurbishment | Dublin | Non-Dublin | Total |
|--|--------------|--------------|--------------|
| None | 13.2 | 23.2 | 22.1 |
| Under €1,200 | 0.0 | 6.1 | 5.4 |
| €1,200 - under €12,000 | 11.1 | 22.5 | 21.2 |
| €12,000 - under €60,000 | 29.9 | 24.3 | 24.9 |
| €60,000 - under €130,000 | 5.0 | 9.0 | 8.6 |
| €130,000 - under €350,000 | 9.4 | 9.5 | 9.5 |
| €350,000 - under €650,000 | 11.5 | 2.3 | 3.3 |
| €650,000 or more | 19.9 | 3.1 | 5.0 |
| Total | 100.0 | 100.0 | 100.0 |

Q. 12 Scale of Drink Retailing Space

In the terms of the sizes of premises, the data indicate that there is a broad spread in terms of scale, ranging from very small premises (less than 250 square feet) to very large (over 2,000 square feet). There are more large premises in the non pub segment than in pubs. In the over 1500 square feet classifications these are 40.8% of non pubs and 28.7% of pubs.

Scale of Drink Retailing Space in Licensed Premises %

| Size of Premises | Public House | Other Premises | Total |
|---------------------|--------------|----------------|--------------|
| Less than 250 sq ft | 7.5 | 10.1 | 8.2 |
| 250 to 500 sq ft | 20.4 | 17.9 | 19.7 |
| 501 to 750 sq ft | 10.3 | 4.8 | 8.9 |
| 751 to 1000 sq ft | 16.0 | 15.3 | 15.8 |
| 1001 to 1500 sq ft | 17.1 | 11.1 | 15.5 |
| 1501 to 2000 | 8.9 | 13.6 | 10.2 |
| 2001 sq ft or more | 19.8 | 27.2 | 21.7 |
| Total | 100.0 | 100.0 | 100.0 |

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Public houses in Dublin are significantly larger than those elsewhere. As the table shows, over half of public houses in Dublin are in excess of 2,000 square feet, compared with only 15.6% of those outside Dublin. At the other end of the scale, almost 60% of non Dublin premises are 1,000 square feet or less, compared with 23.7% of Dublin premises.

Scale of Drink Retailing Space in Public Houses %

| Size of Premises | Dublin | Non-Dublin | Total |
|---------------------|--------------|--------------|--------------|
| Less than 250 sq ft | 1.9 | 8.3 | 7.5 |
| 250 to 500 sq ft | 6.2 | 22.4 | 20.4 |
| 501 to 750 sq ft | 3.8 | 11.2 | 10.3 |
| 751 to 1000 sq ft | 11.8 | 16.5 | 16.0 |
| 1001 to 1500 sq ft | 12.5 | 17.7 | 17.1 |
| 1501 to 2000 | 13.7 | 8.3 | 8.9 |
| 2001 sq ft or more | 50.2 | 15.6 | 19.8 |
| Total | 100.0 | 100.0 | 100.0 |

18.6% of premises increased the size of their drink-retailing space during the last five years and, while most did not make any change, a very small percentage reduced the scale. A slightly smaller proportion of public houses (18.1%) increased their drink-retailing area than was the case for other types of licensed premises (20.2%).

Change in Drink Retailing Space among Licensed Premises %

| Change in Drink Retailing Space over Last five years | Public House | Other Premises | Total |
|--|--------------|----------------|--------------|
| Increase | 18.1 | 20.2 | 18.6 |
| No Change | 78.8 | 78.4 | 78.7 |
| Decrease | 3.1 | 1.4 | 2.7 |
| Total | 100.0 | 100.0 | 100.0 |

There was little difference in the practices of public houses in Dublin and elsewhere in terms of the proportion which changed the drink retailing space during the last five years.

Change in Drink Retailing Space among Public Houses %

| Change in Drink Retailing Space over Last five years | Dublin | Non-Dublin | Total |
|--|--------------|--------------|--------------|
| Increase | 18.2 | 18.0 | 18.1 |
| No Change | 76.8 | 79.1 | 78.8 |
| Decrease | 5.0 | 2.9 | 3.1 |
| Total | 100.0 | 100.0 | 100.0 |

Among those who expanded their premises, the extent of the increase in scale varied considerably. 24.8% of premises increased it by over 50% and 43.4% of premises increased the scale by 20% or less. Public houses had a smaller percentage increase share than was the case for other types of premises at the top end of increases.

Increase in Space in Licensed Premises which Expanded in Last Five Years %

| Percentage increase in Drink Retailing Space | Public House | Other Premises | Total |
|--|--------------|----------------|--------------|
| Up to 10% | 24.9 | 19.3 | 23.1 |
| 11 to 20% | 15.9 | 29.8 | 20.4 |
| 21 to 30% | 16.7 | 9.1 | 14.2 |
| 31 to 50% | 19.8 | 12.7 | 17.5 |
| 51% or higher | 22.7 | 29.1 | 24.8 |
| Total | 100.0 | 100.0 | 100.0 |



It is of interest to note that the scale of expansion was generally greater among public houses outside Dublin, as the table below illustrates. No Dublin pubs engaged in expansion amounting to over 50% of their existing size, and 26.4% of non-Dublin pubs expanded at this rate.

Increase in Space in Public Houses which Expanded in Last Five Years %

| Percentage increase in Drink Retailing Space | Dublin | Non-Dublin | Total |
|--|--------------|--------------|--------------|
| Up to 10% | 18.1 | 25.9 | 24.9 |
| 11 to 20% | 21.1 | 15.1 | 15.9 |
| 21 to 30% | 27.5 | 15.0 | 16.7 |
| 31 to 50% | 33.3 | 17.6 | 19.8 |
| 51% or higher | 0.0 | 26.4 | 22.7 |
| Total | 100.0 | 100.0 | 100.0 |

Q. 13 Main Supplier of Stocks for Each Category of Drink

The table below sets out the main suppliers of stocks for each of the various categories of drinks. As shown, packaged beer is mainly sourced at wholesalers (68.4%), while draught beer comes directly from the manufacturer or importer (74.8%). Spirits and wine are supplied primarily by wholesalers and cider and perry comes mainly from wholesalers (64.6%). Soft drinks are mostly supplied by wholesalers (77.4%) Alcopops are mostly supplied by wholesalers (70.5%).

Main Supplier of Stocks for Each Category of Drink to Licensed Premises %

| Drink Category | Cash & Carry | Wholesaler | Manufacturer /Importer | Not Applicable | Total |
|-----------------|--------------|------------|------------------------|----------------|-------|
| Beer (Packaged) | 8.2 | 68.4 | 20.1 | 3.3 | 100.0 |
| Beer (Draught) | 0.6 | 21.9 | 74.8 | 2.7 | 100.0 |
| Spirits | 25.8 | 57.1 | 15.2 | 1.9 | 100.0 |
| Wine | 19.5 | 70.9 | 8.8 | 0.8 | 100.0 |
| Cider/Perry | 9.1 | 64.6 | 22.6 | 3.7 | 100.0 |
| Alcopops | 10.4 | 70.5 | 6.5 | 12.6 | 100.0 |
| Soft Drinks | 11.3 | 77.4 | 10.1 | 1.2 | 100.0 |

This pattern also broadly reflects the purchasing of public houses, as the table below indicates.

Main Supplier of Stocks for Each Category of Drink to Public Houses %

| Drink Category | Cash & Carry | Wholesaler | Manufacturer /Importer | Not Applicable | Total |
|-----------------|--------------|------------|------------------------|----------------|-------|
| Beer (Packaged) | 7.7 | 69.8 | 20.5 | 2.0 | 100.0 |
| Beer (Draught) | 0.3 | 20.0 | 79.7 | 0.0 | 100.0 |
| Spirits | 27.2 | 56.4 | 16.4 | 0.0 | 100.0 |
| Wine | 23.0 | 67.8 | 8.1 | 1.1 | 100.0 |
| Cider/Perry | 9.2 | 67.3 | 22.0 | 1.5 | 100.0 |
| Alcopops | 11.3 | 72.8 | 6.3 | 9.6 | 100.0 |
| Soft Drinks | 12.5 | 77.2 | 10.3 | 0.0 | 100.0 |

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ANCILLARY SERVICES

Q. 14 Drinking Facilities Provided

A variety of drinking facilities is provided in the different types of licensed premises as shown in the table below. In addition to the expected bar (92.9%) and lounge (74.0%) facilities, 31.5% of premises provide a restaurant and 24.5% provide a beer garden. A discotheque is available in 7.9% of licensed premises. There is some divergence between the pattern of facilities in public houses and in other types of premises; a slightly higher percentage of pubs provide a beer garden while a higher percentage of other premises offer restaurant and discotheque facilities. The difference in restaurant facilities is substantial.

Drinking Facilities Provided in Licensed Premises %

| Type of Premises | Public House | Other Premises | Total |
|------------------|--------------|----------------|-------|
| Bar | 98.5 | 77.9 | 92.9 |
| Lounge | 76.0 | 68.6 | 74.0 |
| Beer Garden | 25.4 | 21.9 | 24.5 |
| Restaurant | 17.0 | 69.7 | 31.5 |
| Discotheque | 6.0 | 13.2 | 7.9 |
| None | 0.0 | 0.0 | 0.0 |
| Other | 3.6 | 6.9 | 4.5 |

Among public houses, aside from the bar facility, a higher proportion of premises in Dublin provide each of the facilities than is the case outside Dublin.

Drinking Facilities Provided in Public Houses %

| Type of Premises | Dublin | Non Dublin | Total |
|------------------|--------|------------|-------|
| Bar | 87.7 | 99.8 | 98.5 |
| Lounge | 85.1 | 74.8 | 76.0 |
| Beer Garden | 30.8 | 24.7 | 25.4 |
| Restaurant | 27.0 | 15.8 | 17.0 |
| Discotheque | 7.8 | 5.7 | 6.0 |
| None | 0.0 | 0.0 | 0.0 |
| Other | 6.7 | 3.1 | 3.6 |

Q. 15 Provision of Bar Food in Licensed Premises

Since the inception of the Survey in 1984, the role of bar food has shown a steady increase in importance.

Over the last five years, the role of bar food has increased for a significant proportion of premises (59.2%). This has been the experience in a lower percentage of pubs (51.3) than has been the case in other types of premises (71.8%). A much higher percentage of pubs outside Dublin (54.6%) pubs have experienced an increase, compared with those located in Dublin (38.8%).



Q. 16 Food Served in Licensed Premises

The type of food served in these licensed premises which provide food is set out in the table below. Over 80% serve sandwiches/rolls, toasted sandwiches, and soup, while 79% offer hot meals

Types of Food Served in Licensed Premises %

| Types of Food | Public Houses | Other Premises | Total |
|--------------------------|---------------|----------------|-------|
| Crisps/Peanuts/Chocolate | 94.6 | 76.2 | 87.3 |
| Sandwiches/Rolls | 95.4 | 89.7 | 93.1 |
| Toasted sandwiches | 93.7 | 84.5 | 90.1 |
| Salads/Buffets | 73.1 | 76.8 | 74.6 |
| Hot Meals | 73.9 | 88.7 | 79.8 |
| Hot Soup | 90.8 | 93.5 | 91.9 |
| Tea/Coffee | 100.0 | 96.8 | 98.7 |
| Other | 3.1 | 8.7 | 5.3 |

In public houses, which serve food while virtually all of the premises serve the basic snacks - crisps/peanuts/chocolate - each of the other types of food were available in broadly similar percentage of Dublin pubs and those outside Dublin, hot meals were more available in Dublin.

Types of Food Served in Public Houses %

| Types of Food | Dublin | Non Dublin | Total |
|--------------------------|--------|------------|-------|
| Crisps/Peanuts/Chocolate | 91.5 | 95.4 | 94.6 |
| Sandwiches/Rolls | 93.2 | 96.0 | 95.4 |
| Toasted Sandwiches | 90.7 | 94.5 | 93.7 |
| Salads/Buffets | 74.6 | 72.7 | 73.1 |
| Hot Meals | 80.1 | 72.1 | 73.9 |
| Hot Soup | 89.9 | 91.1 | 90.8 |
| Tea/Coffee | 100.0 | 100.0 | 100.0 |
| Other | 0.0 | 3.9 | 3.1 |

A significant proportion of premises which offer food, serve it all day (57.6%). An all day food service is more prevalent in premises other than public houses (66.4% compared with 51.7% for pubs), presumably reflecting in part of the number of hotels in the group.

Time of Day Bar Food is Served in Licensed Premises %

| Time of Day | Public Houses | Other Premises | Total |
|-------------|---------------|----------------|-------|
| Lunch Time | 55.6 | 36.7 | 48.2 |
| Tea Time | 21.4 | 31.0 | 25.2 |
| Evening | 13.8 | 36.4 | 22.7 |
| All Day | 52.6 | 66.0 | 57.9 |

There is little difference in the availability of an all-day food service between Dublin pubs and those in other locations. The main divergence between the two is at tea time, when a service is more commonly available among non Dublin premises.

Time of Day Bar Food is Served in Public Houses %

| Time of Day | Dublin | Non Dublin | Total |
|-------------|--------|------------|-------|
| Lunch Time | 59.3 | 54.5 | 55.6 |
| Tea Time | 17.7 | 22.4 | 21.4 |
| Evening | 15.1 | 13.4 | 13.8 |
| All Day | 49.9 | 53.3 | 52.6 |

Most premises which provide food prepare it on the premises (95.3%) while 4.7% use outside caterers. A slightly higher percentage of pubs than other outlets prepare food on the premises. Among pubs, a slightly lower proportion of those in Dublin avail of outside caterers but the shares are very small 2.6% in Dublin and 4.9% elsewhere.

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Q. 17 Entertainment Provided in Licensed Premises

A wide variety of entertainment is provided in licensed premises. The most prevalent is television/video which is offered in 86.4% of premises, followed by Sky Sports/B Sky B (58.3%). Almost half of premises provided recorded music/juke box, while each of live show, snooker/pool, and darts, are available in approximately one-third of premises.

Entertainment Provided in Licensed Premises %

| Type of Entertainment | Public House | Other Premises | Total |
|-------------------------|--------------|----------------|-------|
| Live Show | 35.4 | 38.6 | 36.2 |
| Recorded Music/Juke Box | 49.2 | 43.8 | 47.7 |
| Television/Video | 91.9 | 71.6 | 86.4 |
| Sky Sports/B Sky B | 61.5 | 49.9 | 58.3 |
| Internet/Computer | 2.8 | 14.0 | 5.9 |
| Snooker/Pool | 34.5 | 22.7 | 31.2 |
| Darts | 39.7 | 13.1 | 32.5 |
| Bingo/Prize Games | 3.1 | 6.1 | 3.9 |
| Electronic Games | 8.8 | 3.9 | 7.5 |
| Other | 2.0 | 7.9 | 3.6 |

As the table shows, there were some differences between public houses and other licensed premises in terms of the relative popularity of the various types of entertainment.

Television/video is more prevalent in public houses. The same is true of Sky Sports, snooker/pool and darts.

Entertainment Provided in Public Houses %

| Type of Entertainment | Dublin | Non-Dublin | Total |
|-------------------------|--------|------------|-------|
| Live Show | 28.2 | 36.3 | 35.4 |
| Recorded Music/Juke Box | 59.6 | 47.9 | 49.2 |
| Television/Video | 92.8 | 91.8 | 91.9 |
| Sky Sports/B Sky B | 89.9 | 57.9 | 61.5 |
| Internet/Computer | 2.8 | 2.8 | 2.8 |
| Snooker/Pool | 8.4 | 37.8 | 34.5 |
| Darts | 14.9 | 42.9 | 39.7 |
| Bingo/Prize Games | 1.7 | 3.3 | 3.1 |
| Electronic Games | 8.3 | 8.9 | 8.8 |
| Other | 1.7 | 2.1 | 2.0 |

Among public houses, some differences in relative popularity of particular forms of entertainment were evident, between Dublin pubs and those elsewhere. While Dublin pubs showed a much greater interest in Sky Sports, non-Dublin premises showed relatively greater interest in live entertainment, snooker/pool and darts.

Q. 18 Steps Taken to Encourage or Improve Business in the Last Five Years

A variety of measures are available to licensed premises to encourage business in the drink retailing section. By far the most popular option was refurbishment, which was undertaken by 62.7% of the responding premises engaging in promotional activity. Next in popularity was advertising (36.4%), the expansion of in-house entertainment (32.9%) and catering improvements (28.6%). Refurbishment was by far the most popular option in public houses. Other types of premises opted for refurbishment (58.5%) and catering improvements (47.4%).



Steps Taken to Encourage/Improve Business in Licensed Premises %

| Activities | Public House | Other Premises | Total |
|---|--------------|----------------|-------|
| More In-House Entertainment | 34.0 | 29.9 | 32.9 |
| Prize Draws | 17.9 | 13.8 | 16.7 |
| Refurbishment | 64.2 | 58.5 | 62.7 |
| Introduction or improvement of catering | 21.5 | 47.4 | 28.6 |
| Development of Off-licence sales | 5.2 | 2.5 | 4.5 |
| Advertising | 35.1 | 39.7 | 36.4 |
| Other | 2.7 | 4.3 | 3.1 |

The pattern of activity among public houses in Dublin and other locations had some differences. The table shows that refurbishment as more popular in Dublin than elsewhere as were off-license sales advertising, entertainment and catering.

Steps Taken to Encourage/Improve Business in Public Houses %

| Activities | Dublin | Non-Dublin | Total |
|---|--------|------------|-------|
| More In-House Entertainment | 38.2 | 33.5 | 34.0 |
| Prize Draws | 17.1 | 18.0 | 17.9 |
| Refurbishment | 72.7 | 63.1 | 64.2 |
| Introduction or improvement of catering | 30.8 | 20.3 | 21.5 |
| Development of Off-licence sales | 11.5 | 4.4 | 5.2 |
| Advertising | 39.6 | 34.5 | 35.1 |
| Other | 3.8 | 2.5 | 2.7 |

CUSTOMERS

Q. 19 Customer Profile

The findings of the survey indicate that the customer base of licensed premises continues to be predominantly male; only 3% of premises have less than 50% male customers and they represent more than three-quarters in 24.9% of premises. However, the gender breakdown is around 50:50 in 23.8% of premises.

The predominance of male customers is more prevalent in pubs than other types of premises as the table shows.

Percentage of Customers who are Male in Licensed Premises

| Percentage of Customers | Public House | Other Premises | Total |
|-------------------------|--------------|----------------|--------------|
| Less than 50% | 0.9 | 8.7 | 3.0 |
| About 50% | 18.7 | 37.6 | 23.8 |
| Over 50-75% | 52.2 | 37.9 | 48.3 |
| Over 75% | 28.2 | 15.8 | 24.9 |
| Total | 100.0 | 100.0 | 100.0 |

A predominantly male clientele is more commonly the pattern in pubs outside Dublin. In the Dublin area, a third of public houses (32.0%) have a customer base comprised fairly equally of males and females compared with 17% outside Dublin. In Dublin there are 15.6% in the 75% male category compared to 29.8% elsewhere.

Percentage of Customers who are Male in Public Houses

| Percentage of Customers | Dublin | Non-Dublin | Total |
|-------------------------|--------------|--------------|--------------|
| Less than 50% | 4.4 | 0.5 | 0.9 |
| About 50% | 32.0 | 17.0 | 18.7 |
| Over 50-75% | 48.0 | 52.7 | 52.2 |
| Over 75% | 15.6 | 29.8 | 28.2 |
| Total | 100.0 | 100.0 | 100.0 |

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The following table set out the age profiles of customers for licensed premise. For the average premises, the predominant age group is 31-50 years, representing 41.5% of customers. Next in important is the over 50 years (27.9%) and then the 21-30 years age group. Broadly similar patterns emerged for public houses and for other types of premises.

Analysis of Customers by Age in Licensed Premises %

| Age Range | Public House | Other Premises | Total |
|----------------|--------------|----------------|-------|
| Under 20 Years | 5.7 | 5.9 | 5.7 |
| 21-30 Years | 25.0 | 25.1 | 24.9 |
| 31-50 Years | 41.3 | 42.4 | 41.5 |
| Over 50 Years | 28.0 | 26.6 | 27.9 |
| Total | 100.0 | 100.0 | 100.0 |

Analysis of the average customer age profile in pubs in Dublin and elsewhere shows that there was not much of a difference between the two - except a greater share of 21-30 years customers among pubs in Dublin and a smaller over 50 years share in Dublin compared with elsewhere.

Analysis of Customers by Age in Public Houses %

| Age Range | Dublin | Non-Dublin | Total |
|----------------|--------|------------|-------|
| Under 20 Years | 3.0 | 6.0 | 5.7 |
| 21-30 Years | 29.7 | 24.5 | 25.0 |
| 31-50 Years | 42.5 | 41.1 | 41.3 |
| Over 50 Years | 24.8 | 28.4 | 28.0 |
| Total | 100.0 | 100.0 | 100.0 |

Q. 20 Tourism

In the drink-retailing part of the operation, for the majority of premises (53.2%), tourists represent less than 5% of customers, and for around three-quarters of premises, tourists account for less than 15% of the customer base. However, for a small percentage of premises, tourists are a very significant proportion of customers. Tourism is more important for drink sales in other licensed premises, than for public houses. In 7.4% of the pubs and 28.9% of other premises tourism accounts for at least 25% of sales.

Percentage of Customers in Licensed Premises Accounted for by Tourism

| Percentage of Customers | Public House | Other Premises | Total |
|-------------------------|--------------|----------------|-------|
| Less than 5% | 59.2 | 36.9 | 53.2 |
| 5%-14% | 22.5 | 18.4 | 21.3 |
| 15%-24% | 10.9 | 15.8 | 12.3 |
| 25%-50% | 5.4 | 16.1 | 8.3 |
| Over 50% | 2.0 | 12.8 | 4.9 |
| Total | 100.0 | 100.0 | 100.0 |

Entertainment specifically oriented to tourism is provided in 15.7% of premises. It is less common in pubs than other types of premises.

Entertainment specifically for Tourism

| Entertainment for Tourists | Public House | Other Premises | Total |
|----------------------------|--------------|----------------|-------|
| Yes | 13.7 | 21.2 | 15.7 |
| No | 86.3 | 78.8 | 84.3 |
| Total | 100.0 | 100.0 | 100.0 |



Q. 21 Busiest Time

For most premises, the busiest time of day is late evening - i.e. from 9.00pm until closing time. This is the case in 60.9% of premises on Monday to Thursday. This characteristic is even more marked on Friday and Saturday nights when it is the busiest time for over 70% of premises. It is the busiest for 58.4% on Sundays.

Busiest Time of the Day in Licensed Premises %

| Time of Day | Monday to Thursday | Friday | Saturday | Sunday |
|-----------------------------|-----------------------|--------------|--------------|--------------|
| Lunch-time (12:00-2:00pm) | 7.9 | 4.3 | 3.2 | 7.4 |
| Tea-time (5:00-7:00pm) | 9.9 | 7.5 | 5.8 | 11.2 |
| Early Evening (7:00-9:00pm) | 18.6 | 15.9 | 11.2 | 16.8 |
| Late Evening (9:00-closing) | 60.9 | 70.1 | 75.5 | 58.4 |
| Other | 1.8 | 1.4 | 3.4 | 4.8 |
| Not Applicable | 0.9 | 0.8 | 0.9 | 1.4 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 |

ISSUES

Q. 22 Importance of the Right to Refuse

The right to refuse is considered to be of vital importance to 64.6% of licensed premises, and very important to a further 26.4% of premises. Only 2.1% find it of no importance. The 'right to refuse' is seen as important to a much greater percentage of public houses (95.4% rated it as very or vitally important). A large but smaller percentage of other premises rated it as at least very important (79.2%), 7.1% of other premises assigned it as unimportant compared to 0.2% of pubs.

Importance of the Right to Refuse to Licensed Premises %

| Degree of Importance | Public House | Other Premises | Total |
|----------------------|--------------|----------------|--------------|
| No Importance | 0.2 | 7.1 | 2.1 |
| Some Importance | 4.4 | 13.7 | 6.9 |
| Very Important | 25.3 | 29.5 | 26.4 |
| Vital Importance | 70.1 | 49.7 | 64.6 |
| Total | 100.0 | 100.0 | 100.0 |

Among public houses, the right to refuse is at least very important in 100% of premises in Dublin and 94.8% elsewhere, though it is rated vitally important by a higher percentage of non Dublin pubs.

Importance of the Right to Refuse in Public Houses %

| Degree of Importance | Dublin | Non-Dublin | Total |
|----------------------|--------------|--------------|--------------|
| No Importance | 0.0 | 0.2 | 0.2 |
| Some Importance | 0.0 | 5.0 | 4.4 |
| Very Important | 35.9 | 24.0 | 25.3 |
| Vital Importance | 64.1 | 70.8 | 70.1 |
| Total | 100.0 | 100.0 | 100.0 |

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Q. 22 (b) Preferred Closing Time

The most popular time to stop serving on weekdays (Monday to Thursday) is 11.30pm (51.7%), followed by 12.00am (18.4%). During weekends (Friday and Saturday), the desire to open later is more pronounced. 40.2% of licensed premises would prefer 12.30am closing on the weekend (Friday and Saturday) followed by 1am 17.8% followed by 16.8% for 12.00 midnight. On Sunday nights, an earlier closing is preferred though not to the same extent as for Monday to Thursday.

Preferred Closing Time of Licensed Premises %

| Closing Time | Monday to Thursday | Friday to Saturday | Sunday |
|--------------|--------------------|--------------------|--------------|
| 10:30 PM | 3.4 | 1.8 | 5.2 |
| 11:00 PM | 12.7 | 3.8 | 28.8 |
| 11:30 PM | 51.7 | 11.5 | 24.2 |
| 12:00 AM | 18.4 | 16.8 | 22.4 |
| 12:30 AM | 8.5 | 40.2 | 10.3 |
| 1:00 AM | 3.4 | 17.8 | 6.0 |
| Later | 1.9 | 8.1 | 3.1 |
| Total | 100.0 | 100.0 | 100.0 |

Q. 22 (c) Other Current Issues

Respondents to the survey were invited to raise any current issues which they felt were very important to the licensed trade. Of the total responses, 15.9% identified no issue, while the remainder were spread over a number of issues. The most common were the smoking ban (66.1%) and the right to refuse issue (14.5%). There were different issues identified by public houses, and by other licensed premises. 72.4% of pubs and 48.0% of other premises were concerned with the smoking ban. 27.9% of other premises and 11.7% of pubs had no issues.

Current Important Issues: Licensed Premises %

| Important Issues | Public House | Other Premises | Total |
|------------------------------|--------------|----------------|-------|
| Smoking Ban | 72.4 | 48.0 | 66.1 |
| Children Allowed on Premises | 7.5 | 8.8 | 7.9 |
| Right to Refuse | 16.5 | 8.7 | 14.5 |
| Change to Open/Close Hours | 2.8 | 2.2 | 2.7 |
| Separate Smoking Areas | 0.4 | 0.6 | 0.4 |
| ID Cards | 1.7 | 4.2 | 2.3 |
| Cost of Insurance | 3.7 | 2.2 | 3.3 |
| VAT or Expense of Alcohol | 3.1 | 5.3 | 3.6 |
| Other | 6.8 | 10.3 | 7.7 |
| Nothing | 11.7 | 27.9 | 15.9 |

(Totals add to more than 100% due to multiple answers)

Both Dublin and non Dublin pubs identified the smoking ban as most important followed by right to refuse. However the ban % in Dublin was lower than elsewhere.

Current Important Issues: Public Houses %

| Important Issues | Dublin | Non-Dublin | Total |
|------------------------------|--------|------------|-------|
| Smoking Ban | 63.9 | 73.5 | 72.4 |
| Children Allowed on Premises | 0.0 | 8.5 | 7.5 |
| Right to Refuse | 17.5 | 16.4 | 16.5 |
| Change to Open/Close Hours | 4.7 | 2.6 | 2.8 |
| Separate Smoking Areas | 0.0 | 0.4 | 0.4 |
| ID Cards | 1.7 | 1.6 | 1.7 |
| Cost of Insurance | 3.5 | 3.8 | 3.7 |
| VAT or Expense of Alcohol | 0.0 | 3.4 | 3.1 |
| Other | 9.9 | 6.4 | 6.8 |
| Nothing | 22.1 | 10.4 | 11.7 |



Survey Details

Q. 22 (d) Cert Courses

A relatively small proportion of licensed premises employ staff who have availed of Cert courses but there is an improvement since 1999. 64.4% have no staff members with Cert training, and a further 12.1% have only one staff member with such training. 16.4% have three or more staff members who have availed of Cert courses compared with 8.6% in 1999.

The situation is worse among public houses than other types of premises; 70% of pubs have no Cert trained staff compared to 48.5% of other premises.

Number of Staff in Licensed Premises who have Availed of Cert Courses %

| Staff Members | Public House | Other Premises | Total |
|-------------------------|--------------|----------------|--------------|
| None | 70.3 | 48.5 | 64.4 |
| 1 Staff Member | 10.8 | 15.4 | 12.1 |
| 2 Staff Members | 5.6 | 11.2 | 7.1 |
| 3 Staff Members | 2.6 | 6.2 | 3.5 |
| 4 or more Staff Members | 10.7 | 18.7 | 12.9 |
| Total | 100.0 | 100.0 | 100.0 |

Among public houses, training is somewhat more common in Dublin premises - 56.8% have at least one staff member with Cert training, compared with 26.3% elsewhere for pubs.

Number of Staff in Public Houses who have Availed of Cert Courses %

| Staff Members | Dublin | Non-Dublin | Total |
|-------------------------|--------------|--------------|--------------|
| None | 43.2 | 73.7 | 70.3 |
| 1 Staff Member | 5.5 | 11.5 | 10.8 |
| 2 Staff Members | 9.9 | 5.0 | 5.6 |
| 3 Staff Members | 6.7 | 2.1 | 2.6 |
| 4 or more Staff Members | 34.7 | 7.7 | 10.7 |
| Total | 100.0 | 100.0 | 100.0 |

The total number of licensed premises from the sample frame was 11,559. ESRI interviewed 710 of these out of a total issue of 949. The results of these are broken down as follows:

| Outcome | Number | Percentage |
|--------------------------------|------------|-------------|
| Completed and Useable | 710 | 80.2% |
| Partially Completed | 9 | 1% |
| Refused | 71 | 8% |
| Never Available (soft refusal) | 75 | 8.5% |
| Other (soft refusal) | 20 | 2.3% |
| Total Sample | 885 | 100% |
| Out of Business | 38 | |
| Invalid Address | 9 | |
| Not Drinks Outlet | 17 | |
| Total Non-sample | 64 | |
| Total Issued | 949 | |



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RETAIL SURVEY OF LICENSED PREMISES, 2003

I.D. Number

Date _____

Interviewer Number

Interviewer Name: _____

The Drinks Industry Group has commissioned The Economic and Social Research Institute to conduct a survey of a random sample of public houses in Ireland. Your co-operation in this survey would be of great assistance to us. All information given will be treated in the strictest confidence and only aggregate findings will be used.

The questions which follow refer to the drink retailing part of your premises. Therefore, in a hotel, for example, answers should refer only to those parts which sell alcoholic drinks. Where a grocery shop has a separate drinks retailing section, (i.e. a pub & a grocery shop) it should answer in respect of that part only.

GENERAL

- 1. Please classify this premises in terms of its main activities. What would you regard as the most important activity, the second most important and the third most important activity of this establishment from the following list?** [Int: Tick one box for first, second and third most important as appropriate to indicate how important the respondent regards the listed activities] [Show Card A]

| | <i>1st most important</i> | <i>2nd most important</i> | <i>3rd most important</i> |
|--|-------------------------------|-------------------------------|-------------------------------|
| Public house | <input type="checkbox"/> 1 | <input type="checkbox"/> 1 | <input type="checkbox"/> 1 |
| Grocery | <input type="checkbox"/> 2 | <input type="checkbox"/> 2 | <input type="checkbox"/> 2 |
| Off-licence | <input type="checkbox"/> 3 | <input type="checkbox"/> 3 | <input type="checkbox"/> 3 |
| Hotel | <input type="checkbox"/> 4 | <input type="checkbox"/> 4 | <input type="checkbox"/> 4 |
| Restaurant | <input type="checkbox"/> 5 | <input type="checkbox"/> 5 | <input type="checkbox"/> 5 |
| Sports Club i.e. GAA Club, Football Club | <input type="checkbox"/> 6 | <input type="checkbox"/> 6 | <input type="checkbox"/> 6 |
| Night Club | <input type="checkbox"/> 7 | <input type="checkbox"/> 7 | <input type="checkbox"/> 7 |
| Other (Specify) _____ | <input type="checkbox"/> 8 | <input type="checkbox"/> 8 | <input type="checkbox"/> 8 |
| Not applicable | | <input type="checkbox"/> 9 | <input type="checkbox"/> 9 |

Survey Questionnaire

4a. Does this premises operate:

All year round

 1

On a seasonal basis only

 2

4b. When operating, state number of days open per week: _____ days

5. Where do you consider the premises to be located:

A city

 1

A large town (10,000 or more persons)

 2

A small town or village (under 10,000 persons)

 3

Open country

 4

B EMPLOYMENT

6a For each of the following categories of employment, please state the number employed full-time (over 21 hours per week), part-time (5-21 hours per week), and casual (under 5 hours per week) in the drink-retailing part of the business. Please indicate the male/female breakdown under each heading:

Note: Where an employee is also engaged in other activities not related to retailing drink (e.g. in another part of a hotel), then he or she is classified full- or part-time according to the number of hours spent in the drink retailing part of the establishment. [Show Card B]

| | Full-time | | Part-time | | Casual | | Total |
|---------------------|-----------|--------|-----------|--------|--------|--------|-------|
| | Male | Female | Male | Female | Male | Female | |
| Proprietor(s) | | | | | | | |
| Assisting Relatives | | | | | | | |
| Employees | | | | | | | |
| Total | | | | | | | |

[Int. Please ensure that the figures add up both across and down the table]



6b Please tell me how many of those working on a full-time basis (including owner, proprietors etc) are under 20 years; 20-35 years; 36-50 years and over 50 years of age.

Number of Staff

Under 20 Years _____
 20-35 years _____
 36-50 years _____
 Over 50 years _____
Total _____

[Int: Check that total above equals the total number of full-time employees at Q.6a]

7 What has been the employment and net sales experience in your premises over the last five years? [Int: Please tick (✓) one box on each line]

| | Increased | No change | Decreased |
|-----------------------------|----------------------------|----------------------------|----------------------------|
| Number employed | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| Number of hours worked | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| Net Sales (i.e. net of VAT) | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |

C SALES

8a What was the approximate net value of sales (i.e. sales net of VAT) in the drink-retailing part of your premises in the last 12 months? [Int: Tick one only]

| | | | |
|---------------------------|----------------------------|-------------------------------|-----------------------------|
| Under €30,000 | <input type="checkbox"/> 1 | €650,000 - under €1 million | <input type="checkbox"/> 6 |
| €30,000 - under €60,000 | <input type="checkbox"/> 2 | €1 million - under €1,250,000 | <input type="checkbox"/> 7 |
| €60,000 - under €200,000 | <input type="checkbox"/> 3 | €1,250,000 - under €2,500,000 | <input type="checkbox"/> 8 |
| €200,000 - under €400,000 | <input type="checkbox"/> 4 | €2,500,000 - under €4 million | <input type="checkbox"/> 9 |
| €400,000 - under €650,000 | <input type="checkbox"/> 5 | €4 million or more | <input type="checkbox"/> 10 |

8b If your operation is NOT primarily a public house or off-licence (e.g. if it is a hotel, restaurant, grocery shop etc.) what percentage, approximately of the net value of TOTAL sales in your outlet is accounted for by drinks sales? _____

9 What percentage, approximately, of the net value of sales (i.e. sales net of VAT) in the drink retailing part of your establishment was earned from the sale of alcoholic drinks (i.e. excluding bar-food, cigarettes, groceries etc.)? [Int: Tick one only]

| | | | |
|------------|----------------------------|------------|----------------------------|
| Up to 5% | <input type="checkbox"/> 1 | 51% to 75% | <input type="checkbox"/> 5 |
| 6% to 10% | <input type="checkbox"/> 2 | 76% to 85% | <input type="checkbox"/> 6 |
| 11% to 25% | <input type="checkbox"/> 3 | 86% to 95% | <input type="checkbox"/> 7 |
| 26% to 50% | <input type="checkbox"/> 4 | over 95% | <input type="checkbox"/> 8 |

D COSTS

10 What percentage, approximately, of your net value of sales (i.e. sales net of VAT) is accounted for by wages/salaries? [Int: Tick one box only]

- | | | | |
|------------|----------------------------|-------------|----------------------------|
| Up to 9% | <input type="checkbox"/> 1 | 21% to 24% | <input type="checkbox"/> 4 |
| 10% to 14% | <input type="checkbox"/> 2 | 25% to 50% | <input type="checkbox"/> 6 |
| 15% to 20% | <input type="checkbox"/> 3 | 50% or more | <input type="checkbox"/> 7 |

11 Over the last five years, what was the approximate outlay on refurbishment and decoration in the drink retailing part of your establishment?

- | | | | |
|-------------------------|----------------------------|---------------------------|----------------------------|
| None | <input type="checkbox"/> 1 | €60,000 - under €130,000 | <input type="checkbox"/> 5 |
| Under €1,200 | <input type="checkbox"/> 2 | €130,000 - under €350,000 | <input type="checkbox"/> 6 |
| €1,200 - under €12,000 | <input type="checkbox"/> 3 | €350,000 - under €650,000 | <input type="checkbox"/> 7 |
| €12,000 - under €60,000 | <input type="checkbox"/> 4 | €650,000 or more | <input type="checkbox"/> 8 |

12a What is the approximate square footage of the drink retailing part of your premises? [Int: Exclude off-licence operation, if relevant]

_____ square feet.

12b Thinking back over the last five years, would you say that your drink retailing space has:

Increased 1 Remained Unchanged 2 Go to 13 Decreased 3

12c If increased or decreased:

By what percentage _____ per cent

13 Who is your main supplier of stocks for each category of drink? [Int: Tick one box on each line to indicate the respondent's main supplier for each item] [Show Card C]

- | | Cash and carry | Wholesaler | Manufacturers/Importers |
|------------------------|----------------------------|----------------------------|----------------------------|
| Beer (packaged) | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| Beer (draught) | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| Spirits | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| Wine | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| Cider/Perry | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| Alcopops | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| Soft Drinks | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| Other | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| (Please specify) _____ | | | |



E ANCILLARY SERVICES

14 Do you provide the following drinking facilities? Please answer Yes or No in respect of each.

| | Yes | No | | Yes | No |
|-------------|---------------------------------------|---------------------------------------|-----------------|---------------------------------------|---------------------------------------|
| Bar | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | Discotheque | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² |
| Lounge | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | Other (specify) | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² |
| Beer garden | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | _____ | | |
| Restaurant | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | | | |

15 Do you currently provide bar-food in your establishment?

Yes ¹

No ²

16 Did you ever provide bar-food in your establishment?

Yes ¹ GO TO 18

No ² GO TO 18

17 In the last five years, has the role of bar-food in this establishment?

Increased ¹ Stayed the same ² Decreased ³

17a Could you tell me whether or not you serve each of the following. Please answer Yes or No in respect of each.

| | Yes | No | | Yes | No |
|--------------------------|--|--|-----------------|--|--|
| Crisps/peanuts/chocolate | <input style="border: 1px solid red;" type="checkbox"/> ¹ | <input style="border: 1px solid red;" type="checkbox"/> ² | Hot soup | <input style="border: 1px solid red;" type="checkbox"/> ¹ | <input style="border: 1px solid red;" type="checkbox"/> ² |
| Sandwiches/rolls | <input style="border: 1px solid red;" type="checkbox"/> ¹ | <input style="border: 1px solid red;" type="checkbox"/> ² | Tea/coffee | <input style="border: 1px solid red;" type="checkbox"/> ¹ | <input style="border: 1px solid red;" type="checkbox"/> ² |
| Toasted sandwiches | <input style="border: 1px solid red;" type="checkbox"/> ¹ | <input style="border: 1px solid red;" type="checkbox"/> ² | Other (specify) | <input style="border: 1px solid red;" type="checkbox"/> ¹ | <input style="border: 1px solid red;" type="checkbox"/> ² |
| Salads/buffet | <input style="border: 1px solid red;" type="checkbox"/> ¹ | <input style="border: 1px solid red;" type="checkbox"/> ² | _____ | | |
| Hot meals | <input style="border: 1px solid red;" type="checkbox"/> ¹ | <input style="border: 1px solid red;" type="checkbox"/> ² | | | |

17b When do you serve bar-food? [Int: Tick all that apply]

Lunch time ¹ Evening (7:00pm & later) ³

Tea time (5:00pm-7:00pm) ² All day ⁴

17c Is the food prepared: On the premises ¹ By outside caterers ²

Survey Questionnaire

18 Do you provide the following types of entertainment on the premises? [Int: Tick all that apply]

| | Yes | No | | Yes | No |
|-------------------------|---------------------------------------|---------------------------------------|-------------------|---------------------------------------|---------------------------------------|
| Live show | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | Snooker/pool | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² |
| Recorded music/juke box | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | Darts | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² |
| Television/video | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | Bingo/prize games | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² |
| Sky Sports/B Sky B | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | Electronic games | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² |
| Internet/computer | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | Other, specify | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² |

19 Did you take the following steps to encourage/improve business in drink retailing in the last five years? Please answer Yes or No in respect of each.

| | Yes | No | | Yes | No |
|---|---------------------------------------|---------------------------------------|----------------------------------|---------------------------------------|---------------------------------------|
| More in-house entertainment (as in Q18 above) | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | Development of off-licence sales | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² |
| Prize draws | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | Advertising | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² |
| Refurbishment of the premises | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | Other | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² |
| Introduction or improvement of catering | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | (Please specify) _____ | | |

38

F CUSTOMERS

20a Approximately, what percentage of your drinks customers are males?

Less than 50% ¹ About 50% ² Over 50% - 75% ³ Over 75% ⁴

20b What percentage approximately of your customers for drinks fall into each of the following age brackets?

Under 20 years _____
 21 - 30 years _____
 31 - 50 years _____
 Over 50 years _____
 Total 100% [Int: must sum to 100%]

21a What percentage of your customers for drinks consists of tourists and holiday makers (from both Ireland and abroad)?

Less than 5% ¹ 5-14% ² 15% - 24% ³ 25% - 50% ⁴ More than 50% ⁵



21b Do you provide entertainment specifically oriented to tourism (both international and domestic), e.g. singing pub, traditional music etc?

Yes ¹ No ²

22 Please indicate your busiest time of day for drink sales on mid-week days (Mon-Thur) and for each of Friday, Saturday and Sunday. [Int: Please tick one number on each line for each day or days]

| | Lunch time (12.00 -2.00) | Tea Time (5.00-7.00) | Early Evening (7.00-9.00) | Late Evening (9.00-closing) | Other |
|-----------|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|
| Mon-Thurs | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | <input type="checkbox"/> ³ | <input type="checkbox"/> ⁴ | <input type="checkbox"/> ⁵ |
| Friday | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | <input type="checkbox"/> ³ | <input type="checkbox"/> ⁴ | <input type="checkbox"/> ⁵ |
| Saturday | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | <input type="checkbox"/> ³ | <input type="checkbox"/> ⁴ | <input type="checkbox"/> ⁵ |
| Sunday | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | <input type="checkbox"/> ³ | <input type="checkbox"/> ⁴ | <input type="checkbox"/> ⁵ |

G ISSUES

23a How important to you is the 'Right to refuse'?

No importance ¹ Some importance ² Very important ³ Vital importance ⁴

23b With respect to hours of trading, what time would you prefer to stop serving (assume additional 30 minutes 'drinking up' time). [Int: Tick one time on each line for each day or days]

| | 10.30pm | 11.00pm | 11.30pm | 12.00am | 12.30am | 1.00am | Later |
|-------------------|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|
| Monday - Thursday | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | <input type="checkbox"/> ³ | <input type="checkbox"/> ⁴ | <input type="checkbox"/> ⁵ | <input type="checkbox"/> ⁶ | <input type="checkbox"/> ⁷ |
| Friday- Saturday | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | <input type="checkbox"/> ³ | <input type="checkbox"/> ⁴ | <input type="checkbox"/> ⁵ | <input type="checkbox"/> ⁶ | <input type="checkbox"/> ⁷ |
| Sunday | <input type="checkbox"/> ¹ | <input type="checkbox"/> ² | <input type="checkbox"/> ³ | <input type="checkbox"/> ⁴ | <input type="checkbox"/> ⁵ | <input type="checkbox"/> ⁶ | <input type="checkbox"/> ⁷ |

23c Are there any current issues which you feel are very important to the Licensed Trade? Please specify as fully as possible.

23d How many of the staff in the drink retailing part of your premises have availed of relevant CERT courses?

Number of staff _____

THANK YOU VERY MUCH FOR HAVING ASSISTED IN COMPLETING THIS QUESTIONNAIRE

Survey of Licensed Premises in Ireland 2004

A Report Commissioned by the Drinks Industry Group of Ireland