

‘Insights into factors  
affecting the Irish  
SME pub trade’

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Submitted to the National College of Ireland

September 2013

**Abstract:**

The purpose of this research is to examine the factors that are having an adverse impact on the Irish SME pub trade. In order to provide specific insights into this topic, this study focuses on a number of small to medium sized pubs located in Naas Co. Kildare. This once thriving business sector has suffered serious declines in revenues and in profits in recent years resulting in a 56% decline in trading outlets. It is intended that this study will inform a wider review of the Irish pub industry.

There is a wide range of information available on the overall Irish pub trade. However, based on the literature review conducted for the purpose of this study there appears to be a lack of empirical work on this topic. In order to address this gap in the literature review this study investigates the factors affecting the SME pub trade in Naas a mid-sized town located 30km from Dublin. In an effort to obtain insights into these factors a qualitative approach was used. In-depth interviews were conducted with five publicans working in pubs within the Naas area and with five customers. Each of the interviewees gave their view on this industry in the current economic downturn and what they considered were the main causes of decline in this previously lucrative sector.

The key findings of this study were that the availability of cheap alcohol off trade and changing consumer behaviour have played a vital role in the steep decline in the trade SME pubs in Naas are currently experiencing. Based on the empirical findings the main recommendations are:

- The price difference between the on trade and the off trade to be addressed. It is noted that the government is proposing to intervene in relation to this.
- Consumers are looking for better “value”. The availability of cheap alcohol off trade is making consumers purchasing decision easier; therefore if publicans could offer better value, and then consumers may choose to migrate to the on trade.

Further research should be considered in the area of consumer behaviour.

**Submission of Thesis and Dissertation**

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## **Acknowledgments**

I wish to acknowledge and extend my sincere thanks to following people who supported me through the completion of my dissertation.

Firstly, to all the lecturers at National College of Ireland thank you for your support, and to my dissertation supervisor, Dr. Garvan Whelan who provided me with constructive feedback and guidance throughout my dissertation.

To my family and friends thank you for your support and patience throughout my master programme. Thank you to all those who helped to proof read my thesis.

To my class mates, thank you for your continuing support over the last year.

To all of those who took the time to take part in my research.

Finally, but most importantly I would like in particular to thank my Dad, who has supported me from day one throughout my education with his guidance and words of encouragement. I could not have completed this master programme without your support.

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## 1.0 Introduction

*“The pub sector is in crisis”*. (O’Keeffe, 2012)

*“The alcohol market continues to decline under the weight of continued economic weakness, severe taxation increases and changing consumer behaviour”* (Foley, 2012).

These two quotes provide a practical and theoretical starting point for this study. O’Keeffe represents the owners of licenced public premises (pubs) and his quote highlights the trading crisis that these practitioners find themselves in. From a theoretical perspective this study extends the points raised in Foley’s quote to identify three relevant factors. These relevant factors are:

1. The economic crisis;
2. Government intervention, such as the introduction of the smoking ban, the changing drinks driving limits and excise duties and
3. Changing consumer behaviour.

The purpose of this research study is to examine the impact of these factors that are having an adverse impact on the Irish SME pub trade. In order to provide specific insights into this topic, this study focuses on a number of small to medium sized pubs located in Naas Co. Kildare. This once thriving business sector has suffered serious declines in revenues and in profits in recent years resulting in a 56% decline in trading outlets. It is indeed that this study will inform a wider review of the Irish pub industry.

Fiscal weakness in the Irish economy, changing consumer behaviour and government intervention have each played a significant role in the Irish pub trade as previously stated.

*“Mid-year market figures from the Drinks Industry Group of Ireland (DIGI) reveal that the on-trade is experiencing continued significant decline suffering an 8.2% volume decrease in the first seven months of 2012 in the midst of the weak economic environment”* (DIGI, 2012). This considerable reduction in sales has led to the numerous issues now confronting publicans such as job losses and, unfortunately, pub closures. *“There were twenty three pubs in Naas ten years ago, now there are only twelve”*. (Farragher, 2013).

Changing consumer behaviour has included consumers finding new ways to socialise and to consume alcohol. Unfortunately, this is having a negative impact on the Irish pub trade. On-trade sales are suffering, due to a number of reasons, for example such as consumers choosing to socialise at home being just one, as a result of this there is a greater emphasis on customer viewpoints in this study.

Government intervention plays a substantial role in the day to day running of a pub. There are many policies and laws which must be adhered to by publicans and consumers. The researcher wants to investigate this further to determine whether or not it has had an impact on the pub trade.

The Irish pub trade contributes significantly to the Irish economy and provides employment. It is an important aspect of the Irish tourism industry. *“Our primary focus is to highlight the economic contribution of our industry through the 62,000 jobs we support, the €3 billion turnover and €1 billion exports we generate, and our major contribution to Irish tourism”*. (DIGI, 2013)

The pub trade also plays a role in local communities according to O’Brien, the chairman of DIGI. He mentions that *“Small communities are losing valuable meeting places”*. Foley adds to this the importance of the Irish pub to tourists *“Public houses were the fifth ranked positive feature of the Irish tourism experience. Public houses did not feature in the disadvantages”* (Foley, 2011).

These alarming statements provide the basis for the topic of this research study and the main themes of the literature review.

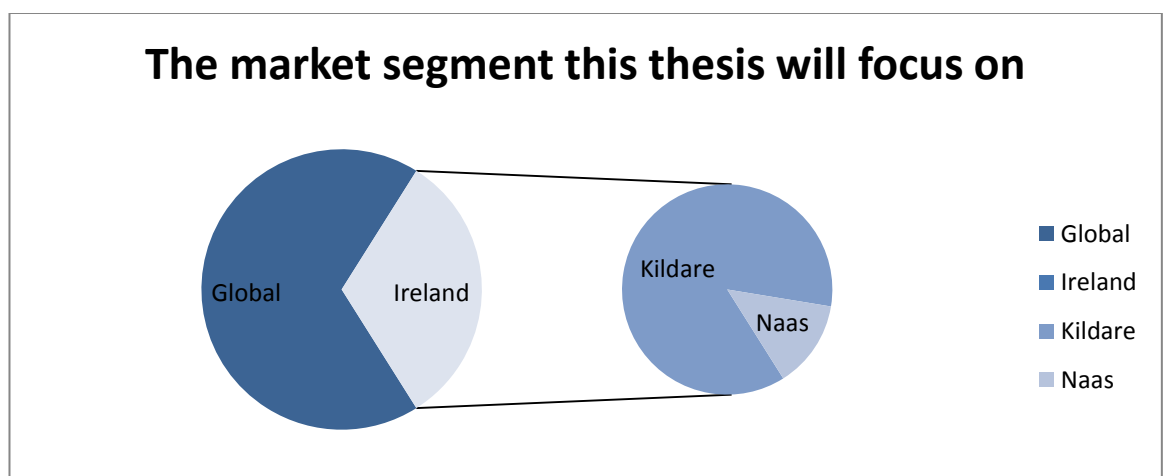


Figure 1



The figure above indicates the market segment which is the focus of this study. As is evident, the wider picture represents how the global recession had a major impact on the Irish Trade. The author is choosing to investigate a smaller market segment i.e. Naas, Co. Kildare.

Secondary research has been conducted in relation to the topics highlighted in the objectives stated above. It was found that while there is some literature available on the pub trade in Ireland much of it is based on reports from general media sources and from various lobby groups. There is a need for empirical findings on the Irish pub trade in order to develop a theory on the factors affecting its performance. In order to make a contribution to this area this study presents empirical findings from research conducted on SME pubs in Naas. The dearth of prior findings and theory in this area informed the methodological approach used in this study. There was a need to conduct in-depth interviews in order to investigate and to uncover the issues that are of relevance to this topic. These interviews were conducted with five practitioners working in pubs in the Naas area. Customers were also interviewed in order to gain insights into how their behaviours have changed due to economic factors. The impacts that the economic crisis and government interventions have had on their spending patterns as they affect the pub trade were also investigated.

This thesis is structured as follows:

1.0 Introduction

2.0 Literature review- this contains secondary information gathered from general media resources, online journals and from various lobby groups

3.0 Methodology- the methods employed to conduct the primary research

4.0 Empirical finding

5.0 Employers and Customers viewpoints

6.0 Results and findings

7.0 Conclusions and Recommendations

8.0 Bibliography.

## 2.0 Literature review introduction:

This literature review sets out to examine how the recession has affected the Irish Pub Trade using previously uncovered information. The sources used include online journals, newspapers, and text books. The issues indicated in the literature review relate to the overall pub trade in Ireland. However, the researcher is focusing mainly on the trade in Naas area which is why there is a need for empirical findings.

Figure two above indicates the market segment which is the focus of this study. While the global recession has had a major impact on the Irish pub trade generally, this study will investigate in particular the smaller market segment of SME pubs in Naas as shown in figure three below.

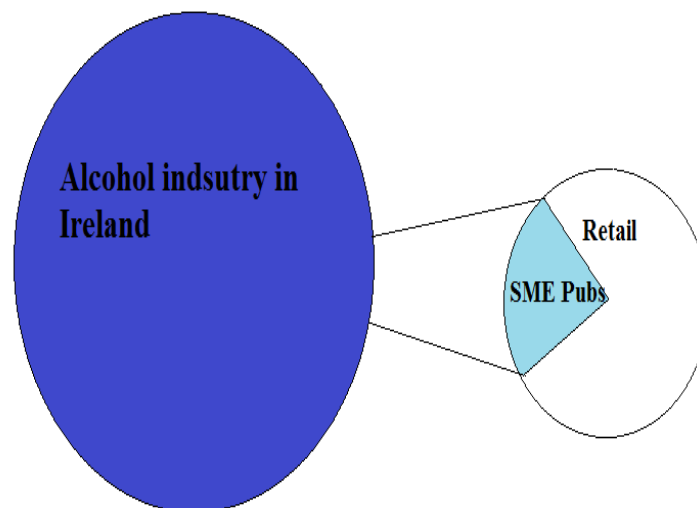


Figure 2

As noted in the introduction, a number of writers have highlighted the need for research in this area. For instance, Donall O’Keeffe of the Drinks Industry Group of Ireland has stated that *“The pub sector is in crisis”*. This is an alarming overview of the drinks industry in Ireland. Foley (2012) adds to this stating that the *“alcohol market continues to decline under the weight of continued economic*

*weakness, severe taxation increases and changing consumer behaviour*". However, Foley (2012) neglects to mention government intervention a factor which will be included in this research paper.

## 2.1 Economic weakness

The table below contains the economic figures in relation to the Irish Pub Trade, for the first three months of 2012 and 2013.

January to March 2012	January to March 2013
<ul style="list-style-type: none"> <li>• 36% say that business is down between 1-10%.</li> </ul>	<ul style="list-style-type: none"> <li>• For 62% of VFI members business has been slow and turnover down.</li> <li>• Only 9% have recorded an increase in business/turnover.</li> <li>• 15% have recorded an increase in turnover when compared with first three months of 2012.</li> </ul>

(VFI, 2013)

The Vintners Federation Ireland expanded on the figures listed above which gave a greater insight into the how the industry has been affected over the last five years. *"Over the last five years turnover is down 34% and we are losing pubs at the rate of a pub every other day"*. (VFI, 2012)

The significant decrease in turnover has resulted in job losses and ultimately, publicans having to cease trading. *"The DIGI review conducted by Dublin City University economist Anthony Foley claims the drop in bar sales has resulted in 5,000 jobs in the sector being lost over the past two years"* (McCárthaigh, 2012).

The figures below were provided by the DIGI regarding the performance of the trade for 2012 and 2013 are shown below:

2012	2013
<ul style="list-style-type: none"> <li>• The volume of bar sales of alcohol continued to decline by a further 6% in 2012.</li> <li>• Alcohol prices increased by 0.9% in 2012</li> </ul> <p>(DIGI, 2013)</p>	<ul style="list-style-type: none"> <li>• January 2013 bar sales volume dropped by 6.9% compared with January 2012 and in February the drop was 3.1% (Foley, 2013 cited in DIGI News/press 2013)</li> </ul>

The figures in the table above raise the question: what is causing such an extensive decrease in the Irish pub trades yearly performance? *“DIGI believes that the weakness in the domestic economy and the continued pressure on household incomes are clearly having a negative effect on the drinks sector with the pub trade suffering disproportionately”* (O’Carroll, 2012).

As sales are decreasing, this is affecting Publicans’ outgoings dramatically. Despite the decline in sales pubs still have monthly invoices to meet and wages to pay. According to Thomas 2008 there have been over a hundred million fewer pints sold within three months *“Between July and September this year, the on-trade sector sold 104m fewer pints than in the same quarter in 2007, which represented the biggest third-quarter fall in a decade”*. (Thomas, 2008).

*“Drinks Industry Group of Ireland (DIGI) shows that the on-trade has continued to see a fall in sales with volume decreasing by 8.2 per cent in the first seven months of 2012. The value of sales dropped by 7.3 per cent. Average sales volumes are now 34.2 per cent below 2007 levels”*. (O’Carroll, 2012). These figures indicate a significant decrease which is detrimental to the survival of this industry.

Molson Coors Ireland conducted an in depth survey in relation to targeting the issue of decreasing footfall in Irish pubs.

*“Everyone knows the pub industry has been in steep decline for some time now,” said Niall Phelan, country manager, Molson Coors Ireland” (Phelan, 2012 cited in Silicon Republic)*

This statement adds to O’Keeffe’s suggestion that the pub trade is in crisis, although Phelan uses ‘steep decline’ to describe the situation confronting Irish pubs.

Diageo announced that they were putting measures in place to restore the pub trade, based on encouraging people to visit pubs during the day as well as at night.

*“Drinks giant Diageo is plotting a marketing initiative to help rejuvenate the flagging pub trade. The activity, dubbed 'Love the Pub', is designed to increase footfall and boost pubs' appeal to a wider demographic so they are used during the day and not just in the evenings”. (Thomas, 2008). Diageo have put numerous plans in place in order to improve the Pub trade during these harsh economic times.*

## **2.2 Government intervention**

The Irish Government plays a significant role in the Irish pub trade. They have introduced many laws and reforms that Publicans must abide by. Excise duty is a particular concern of publicans. *“The Government should also recognize that despite the Troika's proposal for an excise increase, this would further weaken the on-trade and independent off-trade in particular while also running contrary to efforts to boost tourism, consumer spending, and supporting jobs” (DIGI, 2012).*

In the 2013 budget, the Irish consumers saw an increase in the price of wine, spirits and beer. After the announcement of the national budget the VFI described what this meant for the pub trade: *“The Vintners’ Federation of Ireland said the unexpected announcement about excise on alcohol was “jobs negative” and a “massive disappointment”. The group said that the move would make it more difficult for pubs to survive” (Bohan, 2012).*

Unfortunately the annual budget isn’t a publican’s only concern when it comes to alcohol price increases. In 2012, Diageo had plans *“to put up the price of a pint. A pint of Guinness as well as Budweiser and Carlsberg is expected to rise by*

*about five cent. Diageo has blamed the increase on rising barley and energy costs”* (McLysaght, 2012).

The Vintners Federation of Ireland were shocked by this news and responded to Diageo’s plans by highlighting the effect this increase would have on employment.

*“The VFI has said that it is shocked and disappointed at the news, and says that the “inconceivable” move will put thousands of jobs at risk. The VFI also highlights Drinks Industry Group of Ireland figures that show that 54,000 jobs are supported by the pub trade in this country, but that the numbers are in decline”.*

(McLysaght, 2012).

In 2004, the Irish witnessed the introduction of the smoking ban. This ban meant that smoking was forbidden in any public workplace. This ban has been seen as having both advantages and disadvantages. The major advantage of the ban is the health benefits for both staff and consumers. *“More than 3,700 deaths have been prevented in Ireland thanks to the cleaner air we breathe due to the smoking ban”.* (O’Regan, 2013). He continues, stating *“Breathing in somebody else’s cigarette smoke is known to increase the risk of cancer and other health problems”.* This ban has made socialising in bars a safer and healthier activity.

However, when the ban was first implemented in 2004 there were mixed feelings regarding it. The Irish Examiner reported that:

*“The Vintner’s Federation of Ireland claimed that there has been a demonstrable reduction in alcohol sales since the inception of the ban. The director of the Irish Brewers Association claimed that there were seven million fewer pints sold in April than in March as a direct result of the decline in pub-going due to the ban”* (Irish Examiner, 2004 cited in Kuhling, 2004). The Morning Advertiser added to this stating *“Research also suggested that smoking bans were the main cause of pub closures in the UK and Ireland”* (Morning Advertiser, 2013).

With the implementation of the smoking ban, smoking areas have been created to accommodate the smoker. Many smoking areas provide canopies for shelter, outdoor heaters and televisions have been provided at a substantial cost to publicans.

The Road Safety Authority and the Irish Government are making their presence felt in terms of drink driving limits. They have introduced and implemented drink driving campaigns to educate people on knowing their limits. Alcohol levels have been reduced and An Garda Siochana conduct random breathalysing tests to ensure users of Irish roads are not exceeding their limits.

The figures relating to drink driving in Ireland were quite startling, and prompted a call for reform.

*“The Irish Government along with the Road Safety Authority in Ireland, are putting measures in place to reduce these figures. Ireland has a chronic drink driving problem. 18,851 drivers were arrested on suspicion of drink driving in 2007. A total of 18,053 drivers were arrested on suspicion of drink driving in 2008. That is an average of around 347 drivers arrested each week for drink driving in the Republic of Ireland. Ireland is ranked among the highest alcohol consuming countries in the EU”. (Health Research Board, 2007).*

As mentioned above there is a serious problem in Ireland regarding people drink driving. The graph below shows exactly where Ireland ranks in terms of the percentage of road fatalities with drink driving as a factor compared with other OECD/ECMT countries.

The following figures released by the RSA show that Ireland has the fifth highest percentage of road fatalities.

**“Drink Driving as a factor in fatal crashes in selected countries (2002, 2003 or 2004 - Joint OCED/ECMT Transport Research Centre)”**

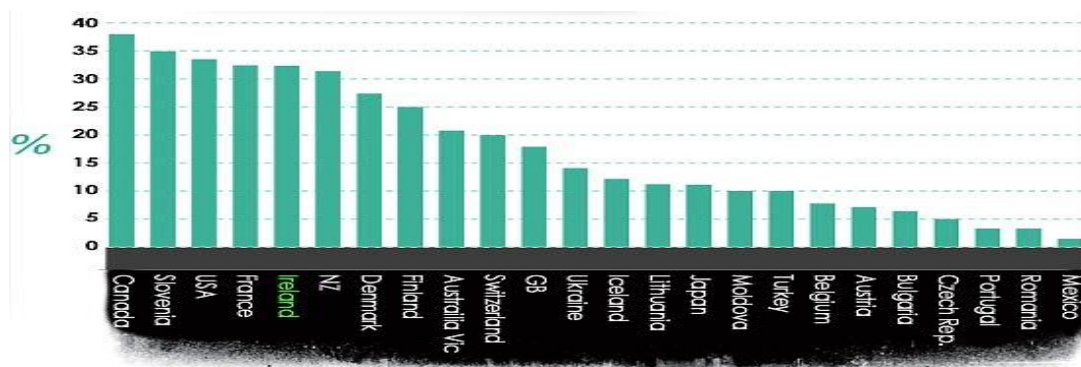


Figure 3

*“The Irish Government and the RSA are putting measures in place in order to reduce these figures, and they are doing so by enforcing drink driving limits. “The aim of the Government’s Road Safety Strategy 2007 - 2012, is to reduce collisions, deaths and injuries on Irish roads by 30%. This means 400 lives could be saved by the end of 2012”.*

(RSA, 2012).

The law on drink driving limits and the repercussions for the offenders is clear, however, in terms of how this new legislation affects the pub trade directly is very unclear as there are no articles available on the subject which is, therefore, an area for future research.

Decreasing sales, reducing footfall and government intervention have unfortunately had a negative effect on the Irish Pub Trade. The pub trade needs to be protected in order to safeguard the thousands of people employed by this industry. *“50,000 people rely on the pub as a means of employment and to support their families”* (VFI, 2013).

Unfortunately, as it stands *“The pub trade is losing 38 jobs a week and the longer government stalls on the introduction of legislation on the sale of alcohol. The more likely it is that this trend will continue. Minister White and Minister Shorthall before him championed a minimum price for alcohol and safer sale and promotion of alcohol, but still we have seen no movement”* (VFI, 2013).

Publicans are also calling for reform in relation to the pricing of alcohol off trade as it is having a major impact on pub trade sales. Figures released by the Vintners Federation of Ireland claim that, *“65% of publicans are very dissatisfied with the level of support from Government for Irish business”* (VFI, 2013).

The alcohol industry is currently in the political limelight for numerous reasons. Dr. James O’Reilly the Irish Minister for health, is in favour of lowering the price of alcohol in pubs and increasing the prices off trade. *“Mr Reilly said he wanted to see alcohol prices fall in pubs and for prices in off-licences and big supermarkets to go “way up”.*” (O’Keefe & Ring, 2013).



Scotland has already made plans to introduce minimum pricing for the sale of alcohol. This will prevent alcohol from being sold cheaply, which will then hopefully result in a reduction in binge drinking. There are now calls for Ireland to do the same.

*“Ireland to follow suit after Scotland pushed ahead with plans to introduce a minimum price for alcohol. Minimum pricing – which sets a ‘floor’ beneath which alcohol cannot be sold stops retailers from selling alcohol cheaply in a bid to prevent people from binge drinking”.*

(Bohan, 2013).

Off trade sales are currently increasing, whilst the on trade is suffering. This is due to the affordable prices of alcohol for sale off trade compared to the prices charged on trade. The cheap alcohol available off trade across the country has supported the new phenomenon of socialising at home. Burns makes a suggestion as to what the major problem for the on trade may be:

*“The biggest problem for the on-trade (relative to the off-trade) is not bulk sales, or too much advertising by the supermarkets. It is that the price difference between the two channels has become bigger (as a result of the scale of the big players) and that consumer income has dropped sharply”.* (Burns, 2011).

Not only did off- trade sales add to the number of people now socialising at home but they have, in fact, hugely affected Guinness sales according to Checkout (2011). *“Sales of Guinness fell by 8% in the second half of 2010 with the continued migration of custom from on-trade to off-trade impacting on Diageo Ireland's total revenues”.*

Publicans are calling for reform in terms of the pricing of alcohol for sale off trade. Not only is there call for reform in terms of off- licences in the locality but Rosemary Garth of the ABFI has called on the government *“to tackle the problem of cross border shopping by lowering VAT and excise duty”* (Murphy, 2009).

The Minister for Health supports these calls for change in the Irish drinking sector: *“Speaking at a health conference, Mr Reilly said he “absolutely supports” minimum pricing for alcohol”* (O’Keeffe & Ring, 2013).

Foley indicates in his report that over half of the alcohol consumed in Ireland is bought off-trade. However, he also states that, despite the increase in off trade sales, many off licences are still closing each month.

Not only do publicans have to compete with the sale of cheap alcohol off trade but there is also the issue of travelling to Northern Ireland to purchase alcohol to contend with. The off-trade sales in Northern Ireland are increasing while the off trade sales in the Republic are decreasing. *“Off-trade alcohol sales in the North were up 25%. While at the same time that the volume of off-sales decreased by 0.8% in the south in 2008”* (Murphy, 2009).

Legislation has been introduced in order to regulate the sale of alcohol off-trade. The public have recently witnessed the modification of the off-licence opening hours. *“Off-licence sales of alcohol are only permitted between the hours of 10.30 am and 10.00 pm on weekdays and 12.30 pm to 10.00 pm on Sundays”* (Citizens information, 2013). These laws on opening hours have not had a negative effect on sales, quite the contrary, in fact. Due to Ireland’s current harsh economic climate, consumers no longer have the disposable income to spend on socialising in pubs which results in them purchasing affordable alcohol off trade and consuming the drink at home.

### **2.3 Changing consumer behaviour**

Consumer behaviour has been deemed one of the factors contributing to a continued decline in bar sales, according to (Foley, 2012).

Socialising and, therefore alcohol consumption have altered in recent years due to the current economic crisis. Many people lost jobs, which resulted in drastic lifestyle changes. Disposable income and socialising are the first things to be affected in a recession which therefore results in less alcohol being consumed. A comparison of figures from non-recessionary periods to figures in 2008 and 2009 (when the economic crisis was at its worst) indicates that the average adult consumed less alcohol in 2008 and 2009. *“The most dramatic fall in recent times came between 2008 and 2009, when the amount consumed by the average adult (defined in this study as someone aged 15 or over) fell from 433 pints a year to 392, the lowest this century”* (Reilly, 2013). However, a study undertaken by Homescan

survey, suggests that the alcohol industry is recession resilient which is the contrary to the Reilly 2013 suggestion. *“While the category is not recession-proof, it has officially been declared “recession-resistant and resilient,” and a “tough and hardy” beverage segment”* (Covino, 2009).

Consumers now have a variety of options to conveniently purchase their alcohol; from supermarkets, off licences, and convenience stores, or on trade in bars and restaurants. *“Convenience stores are up 10 per cent-plus in table wines* (Covino, 2009). The wider variety of options available for the consumer is therefore, having a negative impact on on-trade sales in Ireland.

The following quotation from Foley describes the current off-trade sales in Ireland.

*“Almost 60% of alcohol consumed in Ireland is now sold by the off-trade. However, despite a 3% increase in off-licence sales volumes last year, the report notes that multiples, discounters and symbol operators are absorbing this growth to the detriment of the independent, specialist off-licences and that the latter continues to experience closures and substantial volume declines. Since 2012, one independent off-licence has closed on average each month”* (Foley, 2013).

In addition to a reduction in spending power, consumers are lacking confidence and this is having a negative impact on the Irish economy. Consumers’ confidence needs to be restored to increase their weekly spend. This may, in turn, lead to an increase in alcohol sales.

*“Publicans and retailers all over Ireland see at first hand the crippling effect on confidence and spending power that austerity has had on already hard pressed consumers. People either have no money or are afraid to spend and the government cannot take any more money out of people’s already shallow pockets. We are all looking for a chink of light from this administration to boost confidence”*  
(VFI, 2013).

In terms of trying to encourage consumers to visit pubs again, and help tackle the issue regarding lowering footfall, Molson Coors Ireland conducted a survey in relation to better understanding the issue of decreasing footfall in Irish pubs.

*“Everyone knows the pub industry has been in steep decline for some time now,” said Niall Phelan, country manager, Molson Coors Ireland.*

*“We conducted this research so we could help publicans identify what their customers are looking for, and as a means to help address and improve some of the issues the industry is currently facing.*

*“While price is typically a barrier to growth in a stagnant economy, the research illustrates that by offering value-added services like free Wi-Fi, entertainment and better food and facilities, pubs can meet customer expectations and attract footfall without actually resorting to on-going price reductions”.* (Phelan, 2012 cited in Silicon Republic)

Returning to Foley’s (2012) statement in relation to changing consumer behaviour, consumers are currently reported to be more cynical, savvy, knowledgeable, and they are most definitely more in control of where they are choosing to purchase and consume alcohol. Consumer control is aided by facilities such as the internet where they have access to social media sites and websites such as Rate My Pub and Trip Advisor. Each of these affect the pub business, due to the power of word of mouth or “world of mouse” as it is now being referred to. Research shows that consumers trust word of mouth more than advertisements. Erik Qualman is the author of Socialnomics which explores the power of social media and what it means for businesses today. Qualman suggests that *“78% of consumers trust peer recommendations only 14% trust advertisements”* (Qualman, 2012).

Where and when consumers socialise has also witnessed change. The author identified a gap in research on consumers’ views on the pub trade since the recession and their exact reasons as to why their consumption patterns have changed along with where they socialise. A shortage of disposable income on the part of the consumer has already been identified, but the author wanted to investigate and see where there any other contributing factors. The author endeavoured to fill this gap by conducting in-depth interviews with customers chosen at random to gain an

insight into how they feel the industry has changed and to also get a deeper understanding of where consumers are now purchasing their alcohol.

Publicans have observed a change in alcohol consumption patterns but also a change in how consumers purchase their alcohol. People still want to socialise. However many have had to change the way in which they do so. Many are now drinking at home and going to nightclubs, thus completely bypassing pubs. Drinking at home is now the new phenomenon. Readily available and relatively inexpensive alcohol in supermarkets, convenience stores and off-licences has rendered this option far more attractive.

*“Gone are the days when a few pints in the pub early doors before a trip to the nightclub were the only way for young adults to let their hair down. Drinking at home before leaving for a night out, the phenomenon known as ‘pre-loading’, is now firmly entrenched in the drinking culture among the latest generation of over-18s”*  
(Harrington, 2011).

Sadly for the Irish pub trade things do not look promising for the year ahead. Anthony Foley predicts no improvement in 2013,

*“Unfortunately the early indicators for 2013 for bar sales from the Retail Sales Index are disappointing. In January 2013 bar sales volume dropped by 6.9% compared with January 2012 and in February the drop was 3.1% compared with February 2012”* (Foley, 2013).

A topic that has been heavily discussed above is the off trade. Foley (2013) mentions that there doesn't seem to be much hope for the Publicans as the on trade will continue to suffer as the off trade increases. *“The on-licenced sector will continue to decline and off-licence sales will increase in the multiple symbols”* (Foley, 2013).

As a result of the literature review it was found that there was no prior research conducted in relation to the pub trade in Naas, however, there is information available regarding the overall Irish pub trade. This informed the methodological approach used in this study

### 3.0 Methodology Chapter

The methodology of this research project is important because as previously highlighted, there is very little prior research in this area. There is information available regarding the overall pub trade in Ireland however there is no previous research available in relation to the pub trade in Naas Co. Kildare. This means that there is a need for empirical research on this topic. Since there was little theoretical work done in this area, there is no conceptual foundation and framework and therefore one of the main elements of the methodology used for this research project was grounded theory (GT). Grounded theory is *“an approach to the analysis of qualitative data that aims to generate theory out of research data by achieving a close fit between the two”* (Bryman, 2008 p694).

The methodical approach adapted was influenced by the researchers own experience in this industry. The researcher has worked in the bar trade for the previous five years, this was very beneficial in terms of conducting qualitative research with professionals and enabled the researcher to use the contacts they had made throughout their employment. *“If you are contemplating fieldwork, it simplifies access if you draw upon your existing circle of contacts. Trying to enter new fields is likely to involve time-consuming negotiations and may end in failure”*. (Silverman, 2013)

The researcher carried out action research in the pub in which they are currently in employment, amongst other pubs in the locality. Action research according to Bryman 2008 is *“an approach in which the action researcher and members of a social setting collaborate in the diagnosis of a problem and in the development of a solution based on the diagnosis* (Bryman, 2008 p382).

The factors mentioned above were the justification for the empirical work that was carried out in order to find the effects the recession has had on the Irish Pub Trade.

### 3.1 Research strategy

A qualitative approach was chosen as the most suitable method of research for this paper due to the nature of the topic. Qualitative research has been defined by (Cassell and Symon 1994; Denzin and Lincoln 1994; Gephart 2004; Marschan-Piekkari and Welch 2004; Miles and Huberman 1994), “*we conceive of qualitative research as a set of interpretive activities that seek to understand the situated meaning behind actions and behaviours, and rely heavily on the researcher as a unique interpreter of the data*” (Cited in Sinkovics & Alfoldi, 2012).

An interpretivist approach was chosen as it suited the study better. Interpretivism is an “*epistemological position that requires the social scientist to grasp the subjective meaning of social action*”. (Bryman, 2008) This philosophy was better suited to this study than a positivist approach. “*Positivists tend to use laboratory experiments, field experiments, and surveys as their preferred research methods*”. (Weber, 2004)

The researcher understood that a quantitative method would not have suited this study. “*Quantitative research usually emphasises quantification in the collection and analysis of data, whereas qualitative generally emphasises words*”. (Bryman, 2008 p697)

In depth interviews were the chosen method of research for conducting the relevant empirical work for this paper. This approach enables practitioners to identify issues they see as relevant and also enables the researcher to reflect on these findings and viewpoints to provide some critical analysis.

According to Bryman (2008) an in-depth interview “*refers to an unstructured interview but more often refers to both semi structured and unstructured interviewing*” (Bryman, 2008 p196).

The five professionals that took part in the research would not have the time to sit down and complete a questionnaire that was emailed to them. It was also felt that in depth interviews are more personal and the researcher could examine things such as the surroundings they were in and whether or not any of the managers became uncomfortable with the questions at any stage. “*Sometimes qualitative methods help the researcher in comprehending a phenomenon that quantitative*

*methods cannot provide*” (Bartunek & Seo 2002 cited in Schmidt, 2010). The author agrees with this statement, it was felt that conducting a quantitative approach wouldn't have provided the detailed responses as a qualitative approach.

In depth interviews allowed for more open ended questions. It was also helpful to be there to explain the questions in further detail if the interviewees needed so. In depth interviews involving solely the author and the manager were necessary as each manager preferred to discuss their business in private rather than discussing it in front of people they consider to be in direct competition with.

The interviews conducted with both professionals and customers were unstructured. An unstructured interview is when *“the interviewer typically has only a list of topics or issues, often called an interview guide, that are to be covered. The style of questioning is usually informal. The phrasing and sequencing of questions will vary from interview to interview”* (Bryman, 2008 p196).

In terms of getting in contact with the professionals, the author used the connections that were made over the previous five years. It is important to have a rapport with the respondents it *“encourages the respondent to want (or at least be prepared) to participate in and persist with the interview”* (Bryman, 2008 p201).

When conducting the in depth interviews the questions that were asked were pre-written in order to help the direction of the conversation. The interviews with the professionals and consumers were thirty minutes in duration. The venue in which the interviews with the professionals and the consumers took place varied. Three of the interviews with the professionals took place in the interviewee's workplace which benefited the researcher greatly as they were submerged in the professional's working environment and it also allowed for observation of the day to day running of the pub. The other two took place in the interviewer's home. Three of the interviews with the customers took place in the interviewee's home, one interview was conducted in the interviewer's home, and the final interview took place in a local coffee shop.

Before the interview began the interviewer explained the research question and how they were conducting these interviews in order to gain a greater insight into the pub trade in Naas. The researcher observed the body language of each of the



interviewees, in terms of the interviews with the professionals it was clear they each felt strongly in relation to the off trade and consumers choosing to socialise more at home. Three of the interviews that took place with the professionals were interrupted due to staff queries, witnessing this gave the researcher a greater insight into how demanding this trade really is.

### **3.2 The information required:**

The main purpose for interviewing the five managers was to get a greater insight into how the recession has affected this once affluent trade and to examine what these managers feel were the main causes of this industry declining, and also find answers to the four sub objectives mentioned above. The second category of in depth interviews were carried out with customers. After conducting the in depth interviews with the professionals the author was interested to discover how consumers view this industry in the current economic downturn and what they felt were the main causes to the decline in this once affluent trade. The interviews gave the consumer a chance to voice their opinion on what they felt had gone wrong with the pub industry and how there alcohol consumption has changed due to the current economic crisis. The author also wanted to investigate if government regulation such as the smoking ban, drink driving limits and the stricter opening hours has affected the way consumers purchase and consume alcohol and also the affect it has had on their socialising.

The author felt the options chosen suited the managers better and that more truthful and beneficial information would be provided than using a quantitative method. The author has fortunately used these methods throughout her years in education and has an understanding of the advantages and disadvantages of each.

### **3.3 Who has the information you need?**

The information came from five managers of pubs based in the Naas area. There were four male professional's interviewed and one female. They were ranging from ages 25-60. Out of the five professionals interviewed one of the managers was the proprietor and the other four were employed as full time managers.

The author chose these five professionals as they were the contacts the author had access to. The pubs these managers are responsible for are considered the best places to socialise in Naas. The interviews were conducted at different times and on different days, due to the professionals intense work load, it proved difficult to arrange a particular time that would suit all five. The interviews were conducted from early morning to late at night. Three of the interviews were conducted in the premises in which the professional worked, whereas the other two were not in order to facilitate the interviewee.

Customers are also key players in this industry. The researcher then proceeded to choose five customers at random to conduct in depth interviews in order to obtain a customer's perspective of how they feel the recession has affected the pub trade. There were four female customers interviewed and one male. They were ranging from the ages 20-65. Each customer had different family and employment situations, and this is what the author wanted. Three of the interviews were conducted in the interviewee's home, one was conducted in a local coffee shop and the final interview took place in the researcher's home.

### **3.4 How was the data analysed?**

Once each of the ten interviews were conducted it was decided what process would be used in order to analyse the data received. The process of the analysis of the data collected was grounded theory. The process that was used to examine the grounded theory was open coding. The analysis of the data was based around Bryman's diagram on the "*processes and outcomes in grounded theory*" (Bryman, 2008 p545). In relation to grounded theory Glaser 1998 suggests "*It is important to understand grounded theory as a package of research methods, which includes data collection, coding and analysing through memoing, theoretical sampling and sorting to writing, using the constant comparative method*" (Glaser 1998, p.12 cited in Zarif, 2012). Currently there are two schools of thought in relation to grounded theory they are '*Glaserian School*' and the '*Straussian School*' (Stern, 1994 cited in Zarif, 2012).

Open coding is “*the process of breaking down, examining, comparing, conceptualising and categorising data*” (Bryman, 2008 p543). The way in which this study was coded will be explained in greater detail throughout the paper.

The most important aspect was to start with the overall research question, which was then broken down into three main sub objectives. In terms of the data collection this was completed through conducting in-depth interviews with the relevant people that the author felt were best suited and could provide the knowledge needed to answer the overall research question. Conducting interviews with the relevant people is step two in Bryman’s diagram of the process and outcomes in grounded theory. The relevant people that agreed to part take in the research were professionals in the Pub trade which included five managers in the Naas area. One of the five managers interviewed was the owner. The next categories of relevant people were five consumers who were chosen at random followed by observation which took place in the author’s workplace and other pubs in the Naas area, which will be discussed in greater detail further on.

Once the data was collected, the recordings along with the notes taken throughout each interview were analysed for any key trends or reoccurring themes. The information and viewpoints that were given were then coded, using the method of open coding. When coding the data that was the collected, the author firstly had to listen back to the recordings of each in-depth interview with both the professionals and the consumers, then the notes that were taken throughout each interview were also analysed. Once that had been completed the author then proceeded to type the each transcript. Once the transcripts were completed the author than began to examine the transcripts for any reoccurring trends. The process of open coding allowed the author to summarise thirty four pages of transcripts into four main themes. These themes were as follows:

- Economic weakness affecting the Irish Pub Trade (1)
- Consumer Behaviour (2)
- Government Intervention (3)
- Other Macro Factors affecting the Irish Pub Trade (4)

The author proceeded to go through the transcripts and coded them with each of the numbers placed beside the themes above. The same process was carried out

with the consumer's interviews the same categories were used and a number was placed beside each question that was a reoccurring trend with what another consumer had suggested. Bryman describes a category as a "*concept that has been elaborated so that it is regarded as representing real-world phenomena*" (Bryman, 2008 p544).

The process of coding has helped to group and turn the research questions into categories it also enabled the author to discover any reoccurring themes or pattern which emerged from both the professional's viewpoints and the consumer's viewpoints.

When listening back to the interviews and reading through the notes taken. It was necessary to be open-minded when analysing these transcripts due to the lack of prior of research into this area. Bryman suggests "*it is crucial at this stage to be open-minded and to generate as many new ideas and hence codes as necessary to encapsulate the data*" (Bryman, 2008).

#### **3.4.1 Open coding**

Using the process of open coding was beneficial in terms of assisting the professional's viewpoints and the consumer's viewpoints into categories. The overall research question was broken down into three sub objectives. The three sub objectives were the main themes the author wanted to focus on. In terms of analysing the diary entries the notes that were taken each week were also examined and key themes and reoccurring trends.

The findings of the in-depth interviews conducted with both the practitioners and the consumers were compared to the secondary literature in order to form an analysis that compares the interview findings to the literature. The comparison was conducted in order to highlight instances where the interview findings agreed or disagreed with previous writings and/or modifies new insights into the topic.

#### **3.5 Ethical considerations:**

The research that was carried out was fair, upfront and honest. When conducting the in-depth interviews with the managers and the consumers they all agreed to partake voluntarily.

There were not any computer programs used in analysing the data, the proposed questions to be asked were brought along on a typed A4 sheet of paper and the answers were recorded so that they could be interpreted after the interviews had finished. Copies of the interviews were made into transcripts and are available in the appendices.

### **3.6 Limitations of the methodology:**

The major limitation which has been highlighted throughout the study is due to the lack of prior research conducted. There was a need for empirical research to be conducted in order to find the effects the recession has had on the Irish Pub Trade.

There wasn't any finance available to fund this study. Each of the five managers were on strict schedules due to working late hours, which resulted in the author finding it hard to arrange a time to meet them.

### 3.7 Timeframe:

January 2013	Thesis Proposal due
February	Feedback given, work on the main document commenced.
March	Secondary research is sought such as online articles, books, newspapers etc. for literature review
April	Secondary research continues
May	Methodology chapter.
June	In depth interviews conducted.
July	In-depth interviews conducted.
August	Analysis and coding of transcripts. Final document prepared.
September	Document Submitted

#### 4.0 Findings

The tables below represent the empirical findings from research conducted on SME pubs in Naas along with the interviews conducted five consumers. The analysis of the data was conducted using an open coding method. The first part of the findings will discuss the employer's viewpoints followed by the customer viewpoints. There were ten people in total asked to take part in the research and all ten agreed.

#### 4.1 Employers viewpoints

Question	Yes	No	Maybe
Do you feel the economic crisis has affected the Pub Trade?	X X X X X		
Do you feel the recession has affected footfall?	X X X X	X	
If answered yes, have sales decreased due to lowering footfall?	X X X	X X	
Have you had to let employees go?	X X X X	X	
Have increasing off licence sales affected your business?	X X X X X		
Do you witness many people consuming their own alcohol on your premises?	X X X X X		
Do you feel the smoking ban has affected the pub trade?	X X X X	X	

Do you feel the drink driving ban has affected the Naas trade?		X X X X X	
Have you had to invest more in a suitable smoking area?	X X X X	X	
Have you noticed a change in the overall pub culture? New trends emerging?	X X X X X		
Have you witnessed reoccurring trends in terms of bank holiday weekends?	X X X X X		
Have you had to spend more on advertising since the recession?	X X	X X X	
Do you feel consumers perceptions of the bar trade has changed?	X X X X	X	
Do you feel the customer expects more from you in these recessionary times?	X X X X X		
Have you noticed each customer weekly spend is down?	X X X X X		



Have alcohol consumption patterns changed?	X X X X X		
Do you feel the customer is more in control due to the power of social media, trip advisor and rate my pub?	X X X X	X	
Do you feel that you must put effective service recovery procedures in place in order to retain that all important custom?	X X X	X X	
Do you have a service recovery procedure put in place?	X X	X X X	
If No, is that something you will do in the future?	X X	X	X X
Do you feel maintaining a relationship with customers is effective and worthwhile?	X X X X		X
Do you feel the whole idea around the “local” has changed?	X X X X	X	

## 4.2 Customer viewpoints

Question	Yes	No	Maybe
Do you socialise regularly?	X X X X	X	
Would you avail of special offers advertised in supermarkets and off licences?	X X X	X X	
Would you consider yourself a late drinker?	X	X X X X	
Do you feel the Drink driving ban has affected you personally?	X X	X X X	
Do you smoke?		X X X X X	
If answered no to whether or not you smoke do you still socialise in smoking areas?	X X X X X		
Do you feel smoking areas are adequate in terms of lighting, heating, seating etc?	X X X X	X	
Do you feel the pub trade has changed since the recession?	X X X X X		

Do you feel your consumption patterns have changed since the recession?	X X	X X X	
Do you drink more?	X X	X	
Less?	X	X	
Do you socialise at home often?	X X	X X X	
Has the amount you spend on alcohol changed since the recession?	X X X	X X	
Would you use sites like trip advisor or rate my pub?	X X X	X X	
Would you trust their reviews?	X X X	X	X
Do you feel less people are socialising in pubs?	X X X X	X	
Would you go to the pub during the week for a quiet drink?	X	X X X	X
Do you feel the “local” has changed?	X X X X X		

Do you feel many people are bypassing the pub and going straight to the nightclub?	X X X	X X	
Would pre-drink before you go out?	X X	X X X	

## **5.0 Employer and Customer viewpoints discussion**

The questions shown below were asked in the in-depth interviews with each professional. The questions in the interviews were broken down into four main themes using the coding process, and they are:

- Economic Weakness
- Government Intervention
- Consumer Behaviour
- Other Factors

The information below represents the employers viewpoints given in the interviews conducted.

### **5.1 Economic weakness**

#### **5.1.1 The effects of the economic crisis on the Irish Pub Trade**

- Five out of five respondents claimed that the current economic crisis has had an effect on the Irish Pub trade.

Each of the professionals interviewed had their own opinion to exactly how the recession has affected the pub trade. Here were the key themes that arose:

- People are not socialising as much anymore, the trade is relying on one good night a week, which is a Saturday night.
- Pub closure, E.G there were 23 pubs in Naas ten years ago now there are 12.
- When there is an economic crisis the first thing to go is leisure spending.
- Job losses and decreasing sales.
- People are now socialising at home.
- Off Trade Sales are playing a significant role, due to a cheaper alcohol available and changing consumer habits.
- One publican stated their sales were down a 1/3.

### **5.1.2 The effects the recession has had on footfall.**

- One out of five claimed on certain nights you can see the affects the recession has had, but not on a Saturday night.
- Three out of five claimed that footfall has been majorly affected. One out of the three stated how Monday to Friday is extremely bad and Saturdays are just ok. Another respondent suggested emigration was hugely affecting the footfall in Naas pubs. Footfall is good on Saturday nights only, it has affected the other nights.
- One respondent stated they haven't been affected by lowering footfall especially in the summer months.

### **5.1.3 Have sales dramatically decreased due to the recession and is it harder to meet invoices each month.**

- Four out of five claimed that sales are down due to the current economic climate.
- One manager stated sales are actually good at them moment due to the good.

In terms of meeting their invoices, Four out of five managers claimed this hasn't been an issue at all. Whereas one manager stated they "every pub is finding it hard to meet them, costs are huge in running a pub, its open from 10am to 2am and trying to service that with sales and footfall decreasing, is very difficult.

### **5.1.4 Has lowering footfall, and a decrease in sales affected staff turnover? Have you had to let some employees go?**

- Three out of five have claimed they have had to let staff go.
- One out of five stated they haven't let staff go but they have had to cut their hours.
- One out of five stated they were lucky to not have to let any staff go.

One manger mentioned how he has to rotate the roster particularly in the winter months to ensure he is giving each of his staff work each week. He

mentioned that “In order to try and give each of the staff hours each week, I will put someone on from 9pm to 3pm and then someone will take over from 3pm to 9pm. The full time staff that would generally start at 6pm will now start at 9. In the summer say of a Wednesday night I will have 2 doormen on, 6 barmen and possibly 2 floor staff, and a D.J, in the winter each of those numbers will be halved and a member of staff will put the music on rather than having a D.J. Another manager mentioned how “we had a lot of agency staff and we have had to let them and we are just using our own full time staff now”.

It was also noted that these managers are now seeking help from their families to run the business. They are becoming more involved themselves in order to keep wage bills down.

Each of the publicans felt strongly about the next topic that was discussed, which was regarding off trade sales. It was mentioned how people are already drunk when they come into the pubs they have already had their fill at home so when they come into the pubs they are roughly purchasing two drinks. The off trade sales was referred to as the “greatest annoyance in this business”.

## **5.2 Consumer behaviour**

A change in consumer behaviour has affected the pub trade greatly, as previously mentioned above consumers habits are changing and they are finding new ways to socialise. One publican said “People don’t go to pubs anymore like they used to, young generations won’t even know what it is like to go to a pub”.

Each of the managers believed that changing consumer behaviour has resulted in a variation of how alcohol is now consumed. It was found that consumers are more likely to drink more at home as publican’s are witnessing less people socialising in pubs, however when people are socialising in pubs it has been noted that consumer have been consuming alcohol elsewhere before coming in, and finally some consumers are choosing to bring alcohol purchased off trade onto the premises with them.

**5.2.1 Research shows that off-licence sales have increased as more consumers are purchasing alcohol in supermarkets to consume at home with friends, how do you feel this affected your business?**

- Five out of five respondents agreed that off trade sales have had a major effect on the on trade. One respondent referred to the off trade as the “greatest annoyance in this business”.
- The off trade has devastated the pub trade, this was the general consensus. One publican in particular felt very strong regarding this matter, despite the fact he owns an off-licence himself, he went on to mention how drinking in pubs is more regulated and more social, whereas the off trade is totally unregulated. Each of the managers pointed out the price difference between the on trade and the off trade, the examples that were given were as follows:
  - A bottle of Miller off trade is 75c whereas on trade it is €4.60
  - A “nagin” of vodka is €5 off trade, one shot of vodka on trade is €5.
  - Bottle of Budweiser is 90c and on trade it is €4.80
- Due to the ability to purchase alcohol off trade at incredibly low prices, each of the managers all agreed there has been a rise in consumers taking their own drink purchased off trade into pubs on their person, it was agreed the reason people are doing this is due to the cost of alcohol in pubs and consumers discretionary income is lowering due to the economic crisis.
- One manager in particular took a different approach to consumers now socialising at home, he pointed out when people socialise at home and invite friends and family over etc. they have to pay for their own light bills, heating bills and eventually their own water rates, whereas when you socialise in pubs this is all paid for.



### **5.2.2 Do you witness many people consuming their own alcohol purchased off trade on your premises?**

- Each manager claimed they had witness this.
- One manager claimed they have security checking handbags as people entered the premises
- One manager stated he will request the security men to start checking handbags.
- One manager stated he feels if people have limited money to spend on drink this is what they will resort to.

### **5.2.3 Do you feel many consumers are bypassing the pub and going straight to a nightclub?**

Four out of five publicans claim that when consumers decide to socialise they are bypassing the pubs and going straight to nightclubs.

- One respondent claimed people are drinking at home and then going to late bars/nightclub's
- Two out of five stated Consumers are by passing the pubs and going straight to nightclubs in order to escape paying the cover charge.
- Two out of five suggested it is more 18-21 year olds who are bypassing pubs and going straight to nightclubs.

Despite, what is mentioned above one publican claimed "I think it is a myth that people are bypassing pubs and going straight to nightclubs, nightclubs have suffered drastically".

### **5.2.4 Do you feel consumers perceptions of the bar trade has changed?**

- Four out of five respondents claimed that consumers perceptions of the bar trade has changed since the recession.
- One respondent claimed that their perceptions are still the same, and that they haven't changed.

There was a reoccurring theme in terms of this topic respondents mentioned the following factors when asked about consumer perceptions of the Pub Trade.

- Consumers feel that on trade prices are too expensive, they are more money conscious and they are comparing the

prices of off trade to on trade and seeing the major difference.

- Some consumers may feel that the publicans are greedy due to the reasonable off trade prices.
- Consumers are now more conscious of quality, their standards have risen.

#### **5.2.5 Do you feel the customer expects more from you in these recessionary times?**

- Five out of five respondents agreed that consumers expect more from publicans, in today's recessionary times.

There was a reoccurring trend in terms of this topic, each of the respondents mentioned how they felt consumer's now expect drinks promotions and special offers on alcohol etc.

#### **5.2.6 Have you noticed each customer weekly spend is down?**

- Five out of five respondents claimed that a customer's weekly spend is down.
- One of the respondents mentioned that customers spend has actually halved, he stated that before the recession if he had 200 consumers in his pub he could take in €10,000 in sales, whereas now he may take in €5,000, he also mentioned how customer spend has gone from €50 per head to €25 per head.
- Another respondents stated the feels customers are now budgeting before they go out, they know exactly what they have to spend, also they felt customers are trying to get longer out of there drinks, and they are holding onto them for longer.
- It was pointed out again that consumers lifestyles are changing, they are finding new ways to socialise which is therefore having an effect on customers weekly spend on alcohol. This same respondent also mentioned how they feel men's weekly spend in particular is down, due to them finding other ways to socialise such as going to the gym, cycling, and running etc.

### **5.2.7 Have alcohol consumption patterns changed?**

- Five out of five respondents agreed that consumer's alcohol consumption patterns have changed. However they had different views on how exactly they have changed.
- Two respondents claimed consumers are drinking more. That they are "binge" drinking when they go out.
- Three respondents claimed they are consuming less alcohol.
- One respondent noticed in particular the consumption patterns of students during the summer time, they pointed out that students will sit over pints for longer. However they will consume a large amount of "shots".
- Another respondent agreed with the reference made above in relation to people sitting over there drinks for longer, they have also noticed that in their pub, consumers are now taking longer to drink, they are holding onto an empty glass, before the recession, consumers would have consumed two pints in the time it takes them to consume one.
- Finally, one interviewee stated that due to consumers drinking more at home, they are therefore consuming less when they are socialising in pubs.

### **5.2.8 Do you feel the customer is more in control due to the power of social media, trip advisor and rate my pub?**

- Four out of five respondents claimed that consumers are more in control due to the power of social media and so on.
- One respondent stated that consumer do not have more power.
- One respondent in particular felt strongly regarding this issue. They referred to these sites as "the greatest nuisance" and that they are giving consumers too much power, consumers now think they are a connoisseur of everything due to these sites.

### **5.2.9 Do you feel that you must put effective service recovery procedures in place in order to retain that all important custom?**

- Three out of five respondents' stated that having an effective service recovery procedure in place is important.

- Two out of five felt that it wasn't necessary and that they will deal with complaints as they come.

#### **5.2.10 Do you have a service recovery procedure put in place?**

- Two out of five respondents do have a service recovery procedure put in place
- Three out of five respondents do not.
- Two of the respondent's that do not have a recovery procedure in place mentioned they would consider putting implementing one, if things drastically changed in terms of customer service. The final respondent said they will not implement this procedure and only managers will deal with complaints as they arise.

#### **5.2.11 Do you feel maintaining a relationship with customers is effective and worthwhile?**

- Four out of five respondents claimed it was very important to maintain a relationship with customer.
- One respondent wasn't so sure about this question. They said customer service is paramount, but it won't always guarantee your business, there is no such thing as loyalty in business.

### **5.3 Government intervention**

#### **5.3.1 Do you feel the smoking ban has affected the pub trade?**

- Two out of five stated it has had and is still continuing to have major effect on the trade.
- Two out of five said they feel it is "old news" at this stage that people are used to it they also mentioned that it has created the "beer garden trend".
- Finally the last interviewee was pleased the ban was put in place as he felt it was a healthier environment to work in.

### **5.3.2 Do you feel the drink driving ban has affected the Naas trade?**

- Five out of five respondents claimed the drink driving ban has not affected the pub trade in Naas.

Each of the professionals felt it hasn't had an impact on the pub trade in Naas, due to the availability of taxi's. However, 4/5 interviewees' mentioned how they feel it has affected rural pubs greatly. They each felt strongly about it, stating how they felt it has led to pub closure and how it has "devastated the pub trade in rural Ireland". It was also mentioned by one manager how he arranges lifts home for regulars or he will arrange a taxi to come and collect them as a part of customer service

### **5.3.3. Have you had to invest more in a suitable smoking area?**

- Four out of five interviewees claimed they have had to make major investments in their smoking areas due to the introduction of the smoking ban.
- One respondent mentioned how they haven't made any changes to their smoking area.

The smoking ban has meant a major investment in the providing a suitable area for consumers to smoke, each of the managers with the exception of one have made substantial investments in their beer gardens/smoking areas. The investment in beer gardens has been huge, one publican mentioned he has recently spent €25,000 to upgrade his beer garden a cost he states he cannot afford, he also mentioned when the ban was put in place there weren't any grants given or any financial help in providing a suitable smoking area. Another interviewee pointed out how they have to hire a contractor once a year to maintain their plants and the general upkeep of the beer garden.

### **5.3.4 Do you feel non-smokers are happier visiting your premises since the ban was put in place?**

- Two out of five felt that consumers were definitely happier visiting the premises since the ban was put in place
- One manager stated it was extremely hard to tell as non-smokers are still socialising in beer gardens.

- Two out of five felt there that consumers don't care either way, it hasn't had a huge impact on their decision to socialise in pubs.

## **5.4 Other factors affecting the Irish pub trade**

### **5.4.1 Pub culture**

“The pub culture as we know it has gone”. The managers all agreed when asked if they felt there has been a change in the overall pub culture. The following changes in pub culture were suggested by each interviewee:

- Consumers are now consuming less “pints” of beer, but they are drinking shots, shorts and bottles. Shots have become a huge trend in the last 5-6 years. It was felt that consumers are drinking bottles at home and that is why they will continue to drink them when they are out rather than pints.
- The habitual drinker as we once knew, has completely gone
- The character in pubs has gone
- People need an excuse to go out now, someone's birthday, a family occasion etc.
- The repetitive customer has gone, it goes back to their habits changing
- When the winter comes you may as well “lock the doors”.
- Teatime drinking as it was once known has completely vanished. The recession and the drink driving ban come into play here as the cause.
- Bank Holidays affect inland towns such as Naas, due to people going away

### **5.4.2 Do you feel the whole idea around the “local” has changed?**

- Four out of five claimed that they feel the “local” has gone.
- One respondent felt the idea of the “local” is still there.

Each of the four respondents that claimed that the idea of the “local” pub has gone all gave different reasons as to why. The following bullet points represent the professional's viewpoints regarding the local.

- It depends on the consumer's age, older generations still like to go to their local for a pint, however younger drinkers do not have a local, there is too much variety in the town to choose from. Younger generations will just go to wherever is more “reasonable” and where

there is “more craic”. Younger consumer will move from one pub to the next easily.

- The idea around the local disappearing goes into the changing habitual category. The idea around going for two pints to the local has gone; this generation no longer do that. “When I came here first to Naas I could tell you 30-40 people that would come in for three or four pints, they have all gone now. In Dublin you would see these locals more, or Kildare town but not in Naas. I think it also depends on the socio economic group of a town”.
- People have lost all loyalty to pubs, customers are moving to different pubs they are not just sticking to one.
- There are good choices of pubs available now, there may be a sense of drinking in a “local” mid-week, whereas it has gone at the weekends, we still have our set crowds however they are drinking in other pubs before they come here.
- The one respondent that claimed that the local hasn’t changed stated “I think that the local is still there, however I feel the regulars are not visiting their locals as much, locals that came into us maybe five nights a week, we are lucky if we see them three nights a week now.

#### **5.4.3 Have you witnessed reoccurring trends in terms of bank holiday weekends?**

- Each of the professionals claimed they had noticed reoccurring trends in terms of Bank Holidays.
- Four out of five respondents stated that Bank Holidays are quiet in Naas due to people going away for the Bank Holiday weekend. One interviewee stated how the June and August Bank holiday are extremely quiet.
- One respondent claimed that Bank holidays are very busy, however for two weeks after it can be quiet, due to the amount consumer spent in that one weekend.

#### **5.4.4 Have you had to spend more on advertising since the recession?**

- Two out of five respondents claimed they are now spending more on advertising since the recession. One of the interviewees mentioned how they

never advertised before. They may be advertised once, whereas now they stated “we are now using social media, newspapers, and Google ad words”.

- Three out of five said they haven't spent any more on advertising. Each of the three professionals are currently using social media as their main method of advertising.



Below represents the findings from the consumer's interviews. They have been coded into the same categories as the professional findings.

## **5.5 Economic weakness**

### **5.5.1 How do you feel the pub trade has changed since the recession?**

- Two out of five respondents feel that pubs have to compete more with the off trade since the recession and publicans are trying to entice more consumers with special offers and good value.
- Two out of five respondents claimed that pubs are now extremely quiet. One of the respondents added to this and suggested that the atmosphere in pubs have gone, people are holding onto their drinks longer, consumers have less spending power and teatime drinking which was popular between 5pm to 7pm has completely gone.
- One respondent claimed that the pub trade has changed due to the price of drink on trade and also due to consumers bypassing the pub and going straight to nightclubs.

### **5.5.2 How much do you spend weekly on alcohol?**

- Each of the five interviewees spent different amounts on alcohol. The following figures below represent the amounts each consumer weekly spends on alcohol.
  - €60
  - €100
  - €10-€15
  - €70
- One of the respondents claimed they don't buy alcohol on a weekly or a monthly basis, however on the rare occasion they do spend money on alcohol it is between €12-14.

### **5.5.3 Has this changed since the recession?**

- 3 out of 5 respondents claimed this has changed since the recession
- 2 out of 5 respondents claimed this has not.

## **5.6 Consumer Behaviour**

### **5.6.1 How often would you socialise?**

- Four out of five respondents claimed to socialise once a week
- One respondent socialises once a month.

### **5.6.2 Where do you socialise?**

- Five out of five respondents socialise in their own locality.
- One of the respondents claims to also socialise in different towns occasionally.

### **5.6.3 Would you avail of special offers advertised in supermarkets and off licences?**

- Two out of five respondents claimed they would avail of special offers advertised off trade.
- Three out of five respondents claimed they would not purchase it. One respondent stated that they do not purchase alcohol that was on special as they would then associate it with home drinking and that is something they do not like to do.

### **5.6.4 Would you consider yourself a late drinker?**

- Four out of five respondents claimed they were not late drinkers. Two out of the four pointed out that they go out early in order to return home early.
- One respondent claimed they were a late drinker.

### **5.6.5 Do you feel your consumption patterns have changed?**

- Two out of five respondents claimed that their consumption patterns have changed.
- Three out of five claimed their consumption patterns have not changed.

### **5.6.6 Do you drink more or less?**

- The two respondents that mentioned their consumption patterns have changed stated the following, one interviewee pointed out their consumption patterns changed due to the cost of drink, they are now consuming less, the other respondent pointed out how they are now consuming more alcohol due to purchasing alcohol cheaper off trade and consuming it at home.

#### **5.6.7 Would you socialise at home weekly?**

- Two out of five respondents claimed to never socialise at home.
- One respondent claims to socialise at home every weekend.
- One respondent claims to socialise at home infrequently.
- One respondent claims to socialise at home occasionally.

#### **5.6.8 What is your opinion of the price of drink on trade vs. off trade?**

- Five out of five respondents claimed that the alcohol for sale off trade is cheap.
- Two out of five respondents claimed that the off trade is cheap especially in supermarkets.
- Two out of five respondents stated how expensive they feel the on trade is and that there are excellent offers available in the off licence.

#### **5.6.9 When socialising at home where would you buy purchase your alcohol?**

- Two out of five respondents claimed they would purchase their alcohol in their local off licence, one of these respondents claimed they prefer to support their local off-licence.
- One respondent claimed to purchase their alcohol in the supermarket.
- One respondent claimed they purchase their alcohol in both supermarkets and off-licence.
- One respondent claimed they will shop around and they will purchase alcohol wherever offers the lower price.

#### **5.6.9 Would you use sites like trip advisor or rate my pub**

- Three out of five respondents claimed they use trip advisor.
- Two out of five respondents claimed they don't use trip advisor for their local pubs however they do if they were going abroad.
- None of the respondents claimed to use rate my pub

#### **5.6.10 Would you trust their reviews?**

- Three out of five respondents claimed they do trust trip advisors reviews
- One respondent claimed they do not
- One respondent claimed that they were not sure if they trusted them or not.

#### **5.6.11 Do you feel less people are socialising in pubs?**

- Three out of Five respondents claimed that less people were socialising in pubs.

One respondent claimed they didn't feel less people were socialising in pubs, they felt people still like to socialise.

- One respondent claimed felt that it was more in relation to different generations choosing not to socialise in pubs and choosing to drink at home, they felt their generations which would be 20+ still socialise in pubs.

#### **5.6.13 Would you go to the pub during the week for a quiet drink?**

- Two out of Five respondents claimed they would go to the pub mid-week , 1 interviewee stated they would go if there was an occasion or in order to celebrate something, the other interviewee claimed they liked to go to the pub mid-week during the summer.

- Three out of Five respondents claimed they would not go to the pub during the week. Two of the respondents stated this was due to the drink driving ban and they rely on their car to go to work early the next morning. The other interviewee stated they would not go to the pub mid-week as I am not around people that would like to do that.

#### **5.6.16 In your opinion has the consumption pattern of your peers/colleagues/families changed?**

- Four out of five respondents claimed that their peers etc. consumption patterns have changed. One interviewee felt their colleagues consumption patterns changed in particular, they mentioned how every few months they would organise staff nights out whereas he hasn't been on a staff night out in over two years.
- One respondent claimed that their peers etc. consumption patterns have not changed.

#### **5.6.17 Would you witness many people taking drink into pubs on their person that they purchased off trade?**

- Three out of five respondents claimed that they witness consumers doing this. However, one of interviewees pointed out that they felt this is decreasing somewhat.

- Two out of five respondents claimed they do not witness this happening.

#### **5.6.18 Do you feel many people are by passing the pub and going straight to nightclubs?**

- Three out of five respondents claimed that they feel people are bypassing the pubs.
- Two out of the five respondents claimed that people are not bypassing the pubs. One of the interviewees pointed out that people still love to socialise in pubs however they may not stay in the pub for the entire night.

#### **5.6.19 Would you consume alcohol at home before you go out?**

- Two out of five respondents claimed that they do consume alcohol before they go out. One respondent stated they ensure that they make time in the evening before they go out to “pre-drink”.
- Three out of five respondents claimed they do not consume alcohol before they go out.

### **5.7 Government Intervention**

#### **5.7.1 Do you feel the drink driving ban has affected you personally?**

- Two Out of five respondents claimed the drink driving ban does affect them personally. One interviewee mentioned how they drive for a living and would not drink at all midweek. The other interviewee mentioned how you must organise a designated driver before you as taxis are extremely expensive.
- Three out of five respondents claimed that the ban hasn't had an effect on them. One interviewee does not drive at all whereas the other is currently learning to drive, the final interviewee claimed there is always a way home and plenty taxis are available therefore the ban has never had an effect on their socialising.

#### **5.7.2 Do you smoke?**

- Five out of five respondents claimed they did not smoke.

#### **5.7.4 If no, do you still socialise in smoking areas?**

- Five out of five respondents claimed they still socialised in the smoking area.

### **5.7.5 Do you feel smoking areas are adequate in terms of seating, lighting heating?**

- Four out of five respondents claimed they felt they were adequate.
- One respondent claimed they felt they were not adequate in terms of heating.

## **5.8 Other factors**

### **5.8.1 Do you feel the whole idea around the “local” has changed?**

- Five out of five respondents claimed that they believe the idea of a “local” has disappeared.

Each of the respondents gave different viewpoints in relation to this question. Here are some of the topics mentioned in bullet points below,

- Having a “local was big in 50’s, 60’s and 70’s whereas now that has completely changed, transport links are better which is allowing for people to socialise outside of their locality.
- The variety and the choice of pubs available have had an effect on the “local” it’s hard to just settle for one pub.
- Consumers do not have the money to visit their local they will only do so if there is an occasion.
- Middle aged men who used to go to the pub straight after work for a pint, have stopped and now drinking at home, this one respondent witnessed that changed with their own father.

### **5.8.2 Are there any reoccurring trends emerging in relation to the pub trade?**

Each of the respondents claimed to have noticed reoccurring trends in relation to the pub trade. Here are some of the issues that arose:

- Two out of five respondents claimed how they felt the reoccurring trends were in relation to a change in consumers.
- There is a lot more availability when it comes to alcohol people are not ordering their usual drinks. The introduction of craft beers is a major trend at the moment.
- There are a lot more drinks promotions and specials available in pubs.

- Consumers are only going out if there is an occasion or an event on. They now need a reason to go out.
- The mid-week trade has disappeared.

## 6.0 Results and findings discussion

The tables below represent areas an analysis that compares the data collected through the interviews to the literature. There are instances where the interview finding's agree/disagree with previous writings and/or modifies/adds new insights into the topic.

### 6.1 Economic weakness

Literature Review	Professional viewpoints	Customer viewpoints
O'Keeffe, Phelan, and O'Carroll all describe how the pub sector is currently in decline and how continuing weakening economy is impacting on household income which is then having a negative effect on the pub trade.	The professionals both agreed and added to these statements agreeing that the pub trade is in crisis they added to this statement suggesting that as a result of the crisis, people are not choosing not to socialise as much anymore, the trade is relying on one night a week, which is Saturday. They also mentioned that when there is an economic crisis the first thing to go is leisure spending. It was also mentioned how the sale of cheap alcohol has "devastated" the on trade. One publican added to this stating he felt emigration played a major role in the decline of the pub trade in Naas.	The consumers agreed that the economic crisis has had an effect on the pub trade, suggesting that Irish pubs are now extremely quiet and they have lost their atmosphere.
The Lobby group VFI have reported that in the last five years turnover is down 34% and we are losing pubs at the rate of a pub every other day. DIGI added to this suggesting the value of sales dropped by 7.3 per cent.	Publicans agree that sales are down, however one publican pointed out how badly things were, he pointed out that sales are down more a third which is more than what is suggested by the VFI. The amount of pub closures in Naas was also pointed out.	The consumers generally did not discuss the topic of decreasing sales however one consumer pointed out how much they must be struggling in the last few years.



## 6.2 Government Intervention

Literature Review	Professional viewpoints	Customer viewpoints
<p>It was noted that 3,700 deaths have been prevented due to the cleaner air we breathe thanks to the smoking ban. The effects of second hand smoke were also mentioned and how this increases the risk of cancer and other health problems. The VFI took a different approach to this stating how there has been a demonstrable reduction in alcohol sales since the inception of the ban.</p>	<p>There were mixed reviews in relation to the smoking ban. One professional stated it was a healthier environment to work in; two professionals felt that customers are most definitely happier visiting pubs since the ban. The final two professionals felt strongly in relation to this, however not regarding the ban impacting sales or footfall, but in relation to how the smoking area should be designed to meet certain requirements.</p>	<p>Each of the customers interviewed do not smoke, however all of them still socialise in smoking areas, which disagrees with the statement made by the VFI and the Irish Brewers association.</p>
<p>Ireland has a chronic drink driving problem. 18,851 drivers were arrested on suspicion of drink driving in 2007. A total of 18,053 drivers were arrested on suspicion of drink driving in 2008. Ireland is ranked among the highest alcohol consuming countries in the EU.</p>	<p>The literature examines the arrests in relation to suspension of drink driving, however it fails to mention how the ban has impacted on the trade. The publicans did point out how they felt the drink driving ban has had a major impact on rural Ireland.</p>	<p>Two consumers felt that the drink driving has affected them and that they wouldn't socialise mid-week due to the ban. Other consumers felt the ban hasn't had an impact due to the availability of taxis, but they were also in agreement regarding how the ban has affected rural Ireland.</p>
<p>Mr Reilly said he wanted to see alcohol prices fall in pubs and for prices in off-licences and big supermarkets to go "way up".</p>	<p>The professionals are in favour of this as they feel the off trade has had a major effect on the on trade. It was felt the off trade has devastated the pub trade.</p>	<p>Consumers felt that the off trade offers cheap alcohol and good value. It was felt the on trade is expensive compared to what you can get off trade.</p>

<p>DIGI state how the proposed increase in excise duty should be examined further as this will have an impact on the on-trade, consumer spending and so on.</p>	<p>The practitioners all agreed that sales are in steep decline. They have also witnessed consumers spending less money when they are out socialising and that this is having a negative impact on sales.</p>	<p>Three consumers agreed that their weekly spend is down, due to factors such as family situation and employment status.</p>
<p>Minister White and Minister Shorthall before him championed a minimum price for alcohol and safer sale and promotion of alcohol, but still we have seen no movement (VFI, 2013).</p>	<p>Publicans are in favour of this movement and they mentioned how they are calling reform in relation to the cheap alcohol available off trade.</p>	<p>The consumers were all in agreement that the price of alcohol off trade was extremely cheap they were all happy with the excellent offers available. Whereas another respondent was not happy with how cheap alcohol is available off trade and suggested that there should be more regulation introduced.</p>
<p>Burns (2011) suggested that the biggest problem for the on-trade is not hulk sales, or too much advertising by the supermarkets. It is that the price difference between the two channels has become bigger (as a result of the scale of the big players) and that consumer income has dropped sharply”. Foley adds to this suggesting “The on-licensed sector will continue to decline and off-licence sales will increase in the multiple/symbol” (Foley, 2013).</p>	<p>The practitioners were all in agreement that the off trade is a major problem for pubs. They each gave their own examples of the huge price difference between the on trade and the off trade. It was also mentioned that supermarkets in particular you see peoples trolleys/baskets with cheap drink. Publicans are also continuing to see a decline in the number of people socialising in pubs which adds to Foley’s statement.</p>	<p>Consumers agreed with how cheap the alcohol is off trade, they mentioned how cheap alcohol was in particular in the supermarkets. One consumer stated how they are consuming more alcohol due to how available cheap alcohol is off trade.</p>

<p>65% of publicans are very dissatisfied with the level of support from Government for Irish business. (VFI,2013).</p>	<p>One publican mentioned how they felt there wasn't any support in terms of funding to provide adequate smoking areas when the smoking ban introduced. Yet again the publicans are calling for more reform in relation to the sale of cheap alcohol off trade.</p>	
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### 6.3 Consumer behaviour

Literature Review	Professional viewpoints	Customer viewpoints
<p>Harrington (2011) suggests that the days of going to the pub for a few pints before the nightclub are gone, he goes on to mention how drinking at home is now firmly entrenched in the drinking culture among the latest generation of over-18s.</p>	<p>All of the publicans with the exception of one agreed that consumers are bypassing the pubs and going straight to nightclubs. It was suggested that people are drinking at home and then going to late bars/nightclub's and some of the interviewees added to this and stated they felt it was more 18-21 year olds who are bypassing pubs and going straight to nightclubs.</p>	<p>Two consumers admitted to drinking at home before they socialised in pubs. They felt it was the cheaper alternative. In terms of consumers bypassing the pubs three interviewees agreed with this statement whereas the other two disagreed and pointed out that consumers still like to socialise in pubs.</p>
<p>Reilly (2013) pointed out the most dramatic fall in recent times came between 2008 and 2009, when the amount consumed by the average adult fell from 433 pints a year to 392, the lowest this century.</p>	<p>Three of the respondent's agreed with this, that consumption patterns are falling, however the other two disagreed and stated that consumers are drinking more and when they go out they tend to "binge drink".</p>	<p>Two respondents mentioned their consumption patterns have changed, however only one mentioned how they are drinking less. One interviewee pointed out their consumption patterns changed due to the cost of drink, they are now consuming less, and the other respondent pointed out how they are now consuming more alcohol due to purchasing alcohol cheaper off trade.</p>

<p>Almost 60% of alcohol consumed in Ireland is now sold by the off-trade. However, despite a 3% increase in off-licence sales volumes last year, the report notes that multiples, discounters and symbol operators are absorbing this growth to the detriment of the independent, specialist off-licences and that the latter continues to experience closures and substantial volume declines. Since 2012, one independent off-licence has closed on average each month”. (Foley, 2013).</p>	<p>Publicans agreed due to the increase in alcohol purchased off trade has resulted in consumers drinking more at home and then when they arrive at pubs or nightclubs they are consuming less as they have nearly had their fill at home. They feel that the off trade is unregulated. The practitioners did also mention how they felt the small off licences were not doing well at all that the supermarkets were taking over, which relates back to Foley’s statement about independent off licences.</p>	<p>Each of the consumers admitted to purchasing alcohol off trade to consume at home. The mentioned how the purchased their alcohol in both off licences and supermarkets. One consumer stated that they would purchase alcohol in the local off licence over the supermarket they mentioned they would pay more in order to support them.</p>
<p>78% of consumers trust peer recommendations only 14% trust advertisements” (Qualman, 2012).</p>	<p>The interviews with the professionals added to this statement, they were asked about the effects of social media and sites such as trip advisor and rate my pub. The interviews mentioned how they felt social media has given the consumer more power, one professional disagreed as they felt it did not give them more power.</p>	<p>Each of the consumers admitted to using trip advisor however they used it in a different context. Three out of five respondents claimed they did trust their reviews, one did not and the final interviewee wasn’t sure if they did.</p>

#### **6.4 Analysis of findings**

The above findings relate the secondary information to the interview findings conducted with both professionals and consumers. Some of the interview findings agree/disagree with the secondary research, and some indeed add to and modify the secondary research. It was particularly interesting to note that the literature in relation to the drink driving ban in Ireland focuses on the number of arrests in relation to the suspicion of drink driving. The researcher, however, wanted to gain a deeper insight into how the ban has affected pub sales. Each of the practitioners interviewed in the course of the research agreed it hasn't had an impact on the pub trade in Naas whatsoever, however, they all felt strongly about how it has impacted pubs in rural Ireland. Consumers generally agreed with this verdict. Two respondents mentioned that as a result of the drink driving laws, they no longer socialise during the week.

The contrast between the literature and the findings from the interviews carried out were interesting to behold. The literature suggests that there has been a reduction in alcohol sales since the introduction of the smoking ban, however, the interview findings do not agree with this assertion. Three out of five practitioners stated that the smoking ban has not resulted in a reduction in alcohol sales. They pointed out that it is "old news" now. The two respondents that agreed the smoking ban was still having an impact on the trade explained that it was not in relation to the ban affecting sales, it was due to the continuous changes they felt they had to make in the smoking area itself. The consumers interviewed did not smoke admitted to socialising in the smoking area. The effects of second hand smoke do not seem to be an issue of concern for these consumers. One practitioner agreed with this pointing out it is hard to tell whether second hand smoke has an effect on consumers as non-smokers are still socialising in smoking areas. One consumer felt that smoking areas were inadequate in terms of heating.

There was a general consensus amongst the literature, practitioners and the consumers that took part in the interviews; the Irish pub trade is currently in steep decline. The economic crisis Ireland is experiencing plays a major role in the decline of the Irish pub trade. The present economic circumstances in Ireland have resulted in numerous pubs having to cease trading. One professional stated the pub

closure has had an effect in Naas. He pointed out there were twenty three pubs in Naas ten years ago. Now there are only twelve.

It was also noted that a change in consumer habits and the increase in off trade sales are playing a significant role in the decline of the on trade also. These changes in consumer habits (namely choosing other ways to socialise that do not involve going to their local pub) have resulted in the pub trade relying on one night a week Saturday. Consumers admitted they have less spending power. Family situations were also reported to have an effect on this change in socialising habits.

The literature suggests the government has implied that there are proposed plans to “champion a minimum price for alcohol along with the safer sales and promotion of alcohol”. Dr. O’ Reilly also said he wanted to see alcohol prices fall in pubs and for prices in off-licences and big supermarkets to go “way up”. The professionals are in favour of this as they feel the off trade has had a major effect on the on trade. It was felt the off trade has devastated the pub trade.

The consumers were all in agreement that the price of alcohol off trade is extremely cheap compared to the on trade. Almost 60% of alcohol consumed in Ireland is now sold by the off-trade according to Foley (2013). The consumers all pointed out how expensive alcohol is in pubs and how they are now choosing to purchase off trade. One respondent mentioned how she is “delighted” with the great offers available, and that she also feels consumers deserve some good value. Another mentioned how they are consuming more alcohol due to how available cheap alcohol is off trade. On the other hand, another respondent agreed that while alcohol is cheap off trade, he does not feel that this is a good thing. He pointed out that “the off trade prices are too cheap, especially in supermarkets, they shouldn’t be allowed sell it that cheap, there is definitely more regulation needed”. One professional mentioned that due to the cheap prices available off trade he is witnessing more consumers complaining about the price of alcohol in pubs.

Foley also makes an interesting statement in relation to independent off licences suffering at the hands of supermarkets charging lowering prices for alcohol. As result of this, since 2012, one independent off-licence has closed on average each month. One consumer supported this, stating that they will buy alcohol in the local off licence rather than in the supermarket in order to support the local business.

In relation to government intervention, the VFI (2013) pointed out that 65% of publicans are very dissatisfied with the level of support from the government for Irish business. One professional expressed his dissatisfaction, stating that there wasn't any support (in terms of funding) to provide adequate smoking areas when the smoking ban was introduced. Only one consumer mentioned government intervention in their interview, and it was in relation to the sale of cheap alcohol, especially in supermarkets. He felt there was more regulation needed.

The publicans are in agreement with Harrington's statement (2011) in relation to consumers choosing not to drink in pubs before going to a nightclub. Instead, they have emerged in a relatively new phenomenon of "preloading" at home. Publicans believe that consumers are drinking at home and then going straight to nightclubs as it is cheaper to do so. It was also suggested that consumers do this to avoid the cover charge in nightclubs. However, it is interesting to note that only two out of the five consumers stated that they drink at home before going out socialising.

In this study there is little previous research available in relation to consumers bringing alcohol purchased off-trade into pubs with them. The practitioners interviewed mentioned how they are witnessing more consumers bringing alcohol onto their premises that has been purchased off trade. The consumers interviewed were in agreement with this statement, however, only one respondent actually admitted to doing this, as they felt the on trade is too expensive.

Changing consumer behaviour has resulted in decreasing consumption on trade. Three of the respondents agreed with Reilly's report detailing a decline in consumption. Professionals pointed out that consumption patterns are falling; they have noticed that consumers are holding onto their drinks longer and that they are consuming more at home but less than when they visit the pubs. It was mentioned that consumption patterns have halved since the recession. However the other two publicans disagreed and stated that consumers are drinking more and when they go out they tend to "binge drink".

Two consumers were in agreement that their consumption patterns have changed due to the cost of alcohol, whereas the other respondents stated that their consumption patterns have not changed as they still like to socialise. Two of the other consumers pointed out that they were under the age of eighteen before Ireland



was declared to be in a state of recession and therefore they cannot say whether or not their consumption patterns have changed.

Finally, literature perused over the course of this study suggests that “78% of consumers trust peer recommendations” (Qualman, 2012). Four out of five professionals stated that they believe consumers are more in control due to the power of social media. One respondent in particular felt strongly regarding this issue. They referred to these sites as “the greatest nuisance” and consumers now think they are a connoisseur of everything due to these sites.

Three out of five consumers claimed they use Trip Advisor, but two out of five respondents claimed they don't use Trip Advisor for local pubs. They do if they were going abroad, however. The consumers were then asked if they trusted these reviews. Three out of five respondents claimed they do trust Trip Advisors reviews, one respondent claimed they do not and one respondent claimed that they were unsure as to whether they trusted them or not.

Foley (2013) suggested that the on-trade will continue to decline. The publicans spoken to as a part of this study added an interesting insight to this theory. Four of the publicans interviewed suggested that less people are attending pubs, because they are drinking more at home and they want to escape paying the cover charge into nightclubs. It was also suggested that pub culture is changing as a result of consumers finding different ways to socialise, such as running, going to the gym etc. This idea of consumers changing their socialising habits to more activity-based pursuits was a reoccurring theme mentioned. It was also noted by publicans that consumers need an excuse to go to the pub, someone's birthday or a special occasion. Consumers were agreement with this however they mentioned that they would need a reason to go to the pub midweek more so than at the weekends.

In conclusion, the information above in the relation to the Irish pub trade and SME pubs in Naas, agrees in some places but does however disagree in others. As previously mentioned, the secondary information available focuses on the overall Irish pub trade whereas the primary research conducted focuses on the Naas area. The key findings from conducting this research show that changing consumer behaviour and the off trade have played a vital role in the steep decline the Irish pub trade is being subjected to.

## 7.0 Conclusions and Recommendation's

This paper has provided a detailed account of how the recession has affected the Irish pub trade focusing specifically on the Naas area. The pub trade plays a significant role in the Irish economy in relation to the jobs it supports along with the tourism it attracts. This is why various lobby groups along with the Irish government and indeed the publicans want to protect it.

This once prosperous trade is in steep decline and unfortunately it does not seem to be getting any better. Foley does not foresee any growth for the on trade sector. He quoted "*The on-licenced sector will continue to decline and off-licence sales will increase in the multiple/symbol*" (Foley, 2013)

The researcher set out to investigate the exact effects the recession has had on the pub trade in Naas along with other the effects of government intervention and changing consumer behaviour. It was established that the availability of cheap alcohol off trade along with consumer behaviour, have played the most significant role in the decline of the Irish pub trade. Changing consumer behaviour relates to how consumers habits have changed. It was found that consumers are now finding new ways to consume and purchase alcohol. A staggering 60% of alcohol is now sold off trade. It was also noted that consumers no longer have any loyalty to one pub; resulting in publicans trying to come up with new ways to entice consumers each week. One publican is uncertain whether or not it is worth maintaining a relationship with consumers as "there is no such thing as loyalty in this business". Publicans feel that consumers need an excuse to visit the pub, that there must be an event or an occasion to entice them to. The consumers agreed but indicated such an excuse was only required to entice them mid-week.

It transpired that there was no empirical work available in relation to the Naas pub trade. This was justification for this research. Secondary research was conducted using online journals, text books and newspaper articles. The primary research was conducted using a qualitative method which included in depth interviews with five professionals and five consumers. The author felt that the in depth interviews gave the researcher a greater insight into the topic being studied.

It was interesting to note that the drink driving ban and the smoking ban have had an impact on the pubs in Naas. This was in contrast to the literature, which

suggested that the smoking ban in particular has had an impact on sales. It was noted that the smoking ban has impacted on publicans in relation to their having to meet certain requirements regarding the layout of the smoking area itself, but it has not had an impact on sales or footfall. The literature provides figures in relation to how many people have been arrested on suspicion of drink driving; the researcher, however, wanted to investigate whether the stricter drink driving limits have had an impact on pubs in relation to sales and footfall. It was, however, noted that the ban has had an impact on the midweek trade due but it hasn't had an impact on the weekends due to the availability of taxis in the area.

After investigating numerous factors in relation to the effects the recession has had on the pub trade it was noted that in particular, a change in consumer habits in which there has been a greater emphasis on throughout this study, along with the price difference between the on trade and the off trade played the most significant role in the weakening of this once flourishing industry. The recommendations and the future research the author believes should be considered are detailed below. The recommendations are based upon the factors the author believes were the key findings in relation to the overall research question, and therefore would be extremely beneficial for publicans to take note of. Future in-depth research is proposed on consumer behaviour as it is considered that the results would be valuable to publicans.

### **7.1 Recommendations:**

The following recommendations should be considered:

- The price difference between the on trade and the off trade to be addressed. It is noted that the government is proposing to intervene in relation to this.
- Publicans' need to ensure they are doing everything they can to entice consumers to socialise in pubs rather than at home, especially mid-week.
- Consumers are looking for better "value" and as mentioned above, the availability of cheap alcohol off trade is making consumers purchasing decision easier; therefore if publicans could offer better value, and then consumers may choose to migrate to the on trade.

- A general recommendation to all publicans would be to conduct more research and require more feedback from consumers due to the increase in changing consumer behaviour.

As previously stated the major limitation of this research paper were the lack of empirical work carried out on SME pubs in Naas. In addition, there were time constraints and a lack of financial resources available to conduct the research. The researcher intended to investigate changing consumer behaviour in greater detail but, due to time constraints and the word count for this study it was not possible to do this.

### **7.2 Future Research:**

Further in-depth research is required on changing consumer habits at a deeper level as the author believes that such changes have played a very significant role in the current difficulties the Irish pub is facing at this time. As this is of huge importance to the pub trade, the area should therefore be studied in further detail in order to investigate the exact causes for this. A larger sample size should be examined in order to investigate more late bars and nightclubs in the wider Naas area, to see the effects of consumers choosing to drink more at home has on their business and also to see if consumers are actually choosing to by the pubs in order o enter clubs earlier to avoid paying the cover charge.

### **7.3 Limitations:**

This study has revealed both positive and negative findings for SME pubs in Naas. The data collected is however limited to the Naas area. As mentioned above the researcher does recommend looking a larger sample size and including more late bars and nightclubs into the equation. The findings of the further research can then be cross referenced to see if there are any patterns reoccurring in relation to consumer behaviour depending on whether a publican has a late licence/nightclub licence if they close at the regular time.

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## 9.0 Appendices

Below represents the structure of the interviews carried out with both the professionals and the consumers.

### Appendix 1: Employer interviews.

**The interviewer:** First of all I would like to thank you for taking part in this research. The research is for my thesis, which examines the effects of the recession on the pub trade focusing particularly on the Naas area. If there are any questions you would like me to repeat or explain in greater just ask. So we shall begin, I have questions here with me.

Interview Questions:

- 1) The first question is general, how do you personally feel the economic crisis has affected the pub trade?
- 2) Do you feel the recession has affected the footfall?
- 3) If answered yes above, how has footfall affected the overall trade? Have sales dramatically decreased? Are you finding it harder to meet invoices each month?
- 4) Has lowering footfall, and a decrease in sales affected staff turnover? Have you had to let some employees go?
- 5) Research shows that off-licence sales have increased as more consumers are purchasing alcohol in supermarkets to consume at home with friends, how do you feel this affected your business?
- 6) Do you witness many people consuming their own alcohol purchased off trade on your premises?
- 7) Have you been affected by “cheap booze” for example in off licences and supermarkets?
- 8) Many consumers are drinking at home first and then going straight to the night clubs, bypassing the pubs, do you agree with that statement?
- 9) Government intervention such as the smoking ban and drink driving limits play a major role in the alcohol industry. Firstly how do you feel the smoking ban has affected the pub trade?
- 10) How do you feel the drink driving ban has affected the weekend trade and the mid-week trade?
- 11) Going back to the smoking ban, have you had to invest more in providing a suitable area for people to smoke, such as seating, television’s etc.?

- 12) Do you feel non-smokers are happier visiting your premises with the ban put in place?
- 13) Have you noticed an overall change in the pub culture? Are there any new trends that are emerging?
- 14) Have you witnessed any reoccurring trends In terms of bank holiday weekends? How do you feel they affect sales for the following weeks?
- 15) Do you feel you have had to spend more on advertising since the recession?
- 16) Do you feel consumers perceptions of the bar trade has changed?
- 17) Do you feel the customer expects more from you during these recessionary times?
- 18) Have you noticed each customer weekly spend is down?
- 19) Have customers consumption patterns changed?
- 20) Do you feel the consumer is more in control due to the power of social media and sites such as rate my pub and trip advisor?
- 21) How does being a manager fit in with your personal life?
- 22) Do you feel you take work home?
- 23) Do you feel that you must put effective service recovery procedures in place in order to retain that all important custom?
  
- 24) Do you personally feel that maintaining a relationship with customers is effective and worthwhile, if answered yes, why?
- 25) Do you have customer relationship management put in place, such as service recovery? No, we haven't out procedures like that in place.
- 26) If answered No, Is that something you will do in the future?
- 27) Do you feel the whole idea of the "local" has changed?

Interview 2:

Name: Conal Byrne

Date: 11/06/2013

Time: 11am

Venue: Interviewers home.

- 1) The first question is general, how do you personally feel the economic crisis has affected the pub trade?

People are not going out as much, the trade is literally down to one good night a week which is a Saturday night whereas before you were getting at least three good nights a week.

- 2) Do you feel the recession has affected the footfall?

On certain nights I do, footfall is good on Saturday nights but it has affected other nights.

- 3) If answered yes above, how has footfall affected the overall trade? Have sales dramatically decreased? Are you finding it harder to meet invoices each month?

Yes its quieter, you now have to take everything week by week and see how it goes. You just can't determine how it's going to be anymore. One week can be very good and the next can be terrible. We still luckily can meet our creditors.

- 4) Has lowering footfall, and a decrease in sales affected staff turnover?

Have you had to let some employees go?

Yes we have had to let our agency staff go and were just using our own full time staff now.

- 5) Research shows that off-licence sales have increased as more consumers are purchasing alcohol in supermarkets to consume at home with friends, how do you feel this affected your business?

- 6) Do you witness many people consuming their own alcohol purchased off trade on your premises?

Yes this has become a big thing and we now have to get security to check handbags at the gate on the way in.

7) Have you been affected by “cheap booze” for example in off licences and supermarkets?

Yes, it’s actually a lot messier now because people will have had their fill before they come in to us, so when they have had one or two drinks in our place is all they need.

Nagins are cheaper so they are bought in the handbags, you can buy a nagin for what over a fiver and there are five shots in it, one shot of vodka in the court is five euro.

8) Many consumers are drinking at home first and then going straight to the night clubs, bypassing the pubs, do you agree with that statement?

Yes, I think they do by pass the pubs, we can see that the pubs aren’t that busy on a Saturday night but then we are. People are drinking at home and then coming into us or they go to the pub later and then come to us.

9) Government intervention such as the smoking ban and drink driving limits play a major role in the alcohol industry. Firstly how do you feel the smoking ban has affected the pub trade?

Smoking ban most definitely has affected, smokers want comfort when they are outside whereas now with new legislation they basically just want a shed with a roof on it. Can’t have smokers comfortable.

10) How do you feel the drink driving ban has affected the weekend trade and the mid-week trade?

It hasn’t really affected us as such because we are located right in the centre of the town. But I think it does affect rural pubs, people having soft drinks when they come in don’t really affect us. The designated driver campaign didn’t work no one availed of it.

11) Going back to the smoking ban, have you had to invest more in providing a suitable area for people to smoke, such as seating, television’s etc.?

Yes had to invest a lot. And then we were told to take it all back out.

12) Do you feel non-smokers are happier visiting your premises with the ban put in place?

Yes most definitely, most non-smokers hate the smell of smoke and being in a smelly Smokey atmosphere but the flip side of this is a lot of non-smokers enjoy smoking areas from a social perspective.

13) Have you noticed an overall change in the pub culture? Are there any new trends that are emerging?

Some things have changed. People go out later now. A lot of people drinks at home now and then go clubbing skipping the pub. But, the pub is still a big part of how Irish people socialise so even though trends are changing with the times and our current economy, Irish pub culture is still a big part of our culture.

14) Have you witnessed any reoccurring trends In terms of bank holiday weekends? How do you feel they affect sales for the following weeks?

Bank holidays are still as busy as ever for us, however the week after is usually a lot quieter than normal. It seems that people go mad so to speak and then pay for it the week after! Which obviously affects trade.

15) Do you feel you have had to spend more on advertising since the recession?

We do advertise a lot more now, but it doesn't have to cost a fortune. Social media is gone so big now and it's a huge part of how bars/restaurants/clubs advertise and we're no different.

16) Do you feel consumers perceptions of the bar trade has changed?

Yes, people are more money conscious, so they look at the bar trade to be expensive which it is if you compare off trade to the bar trade, it is quite expensive to go out for a night out. So people look at it differently, they don't want to spend a fortune on a night out when they could sit in, or half their costs and drink at home first before they go out.

17) Do you feel the customer expects more from you during these recessionary times?

They do, everyone wants a bargain or a promotion or a half price entry fee but obviously you can't do that all the time, but we do on a regular basis we have offers and promotions but you can't do it all the time.

People look for it more and more now,

18) Have you noticed each customer weekly spend is down?

As a hotel/club that has a huge turnover of customers I couldn't really tell you if someone's weekly spend is down. We have very few regulars.

19) Have customers consumption patterns changed?

I think they have. I personally feel people consume a lot more alcohol now when they're out. Maybe it's stress or maybe it's just customers blowing off steam but I think people just go mad when they go on a night out now.

20) Do you feel the consumer is more in control due to the power of social media and sites such as rate my pub and trip advisor?

No not necessarily do they have more control I feel they have more ways to vent their anger and dislike. This however hasn't affected the court.

21) How does being a manager fit in with your personal life?

It is not easy. There are long hours, you're always on the phone. I feel even when I'm walking down the street on my day off I am still seen as part of the Naas Court

22) Do you feel you take work home?

Yes, in terms of social media, I have to check Facebook when I am at home. I'm checking the comments and replying to them, I am updating statuses. I am checking the mails on Facebook along with emails to see if there have been any bookings for party's in. there are phone calls nonstop.

23) Do you feel that you must put effective service recovery procedures in place in order to retain that all important custom?

We don't have a procedure in place as such, but we do deal with every complaint properly.

24) Do you personally feel that maintaining a relationship with customers is effective and worthwhile, if answered yes, why?

Yes, I do otherwise you will lose custom. It also helps you deal with complaints. If you have a good relationship with customers they will give you feedback.

25) Do you have customer relationship management put in place, such as service recovery? No, we haven't put procedures like that in place. We deal with every complaint as they come through.

26) If answered No, Is that something you will do in the future?

Yes, if things change drastically we might have to. If customer perception changed or if we were losing custom then we would.



27) Do you feel the whole idea of the “local” has changed?

In Naas town yes. There is so much choice and competition now. The bar that does the best business is generally the one that's seen to be doing the most to attract business into the bar. I.e. entertainment/promotions/offers etc.

Name: Ger Farragher.

Date: 26/06/2013

Time: 16:00pm

Venue: Kavanaghs pub, Naas.

- 1) The first question is general, how do you personally feel the economic crisis has affected the pub trade?

The amount of pubs that have closed is catastrophic. We know that some of the pub have had to close but there will be no pubs left at all in rural Ireland. Even in well off areas there are pubs closing. Naas for e.g. 23 pubs ten years ago now there are 12. It's more than lifestyles behind why they are closing. First think to stop spending money when there is an economic crisis is drink. Leisure spending goes. To me one of the greatest disasters to the pub trade is the off trade. The off trade has devastated the pub trade. The government promised in the pre – election they were going to tackle below cost selling of alcohol and they have not done it and that has been one of the greatest disasters for pubs. You can buy miller for 75c in off trade say places like Tesco aldi and lidl. Buying big slabs of drink and drinking it at home. It's totally unregulated. Pubs are more social regulated and controlled yet the government have done nothing about it. Dr. James O Reilly now advised people to go back to pubs, less spending controlled and sociable. Families have been devastated by off trade drinking, parents getting drunk in front of kids. Slugging cheap wine in front of the kids. I feel awful strong about it and I own an off licence.

- 2) Do you feel the recession has affected the footfall?

No question about it, absolutely. Footfall has been declining anyway because people's habits are changing. They have hanged to walking, running, aerobics, and yoga. People don't go to the pub anymore. People aren't using the pub like they used to, young generations won't even know what it's like to go to a pub.

- 3) If answered yes above, how has footfall affected the overall trade? Have sales dramatically decreased? Are you finding it harder to meet invoices each month?

Of course, every pub is finding it hard to meet them; costs are huge in running a pub. It's open from dawn to dusk. Half 10 to 2am in the morning and to try service that with footfall down. Sales are down but your heat cost is still the same, your light is still the same, your rates are still the same, insurance is still the same, and footfall is down so it just doesn't make economic sense, and we haven't gotten any help at all.

- 4) Has lowering footfall, and a decrease in sales affected staff turnover? Have you had to let some employees go?

No question about it, again absolutely full time staff has been reduced and people are working of part time staff, they can't afford to pay somebody full time. It's sad because I think the pub industry is one of the second biggest employers in the country and there letting go staff. Even pubs being interviewed this year are saying there still letting people go. It's all down to a Friday and Saturday night now. So then all you need extra is a part timer or 2. Pub owners have also gone back in behind the bar in a big scale, now they should have always been there, some of them never were and that's their problem but pub owners are working longer hours now than they ever were. That includes husband and wife.

- 5) Research shows that off-licence sales have increased as more consumers are purchasing alcohol in supermarkets to consume at home with friends, how do you feel this affected your business?

No question about it. It's the greatest annoyance in this business is this home drinking. I think it's terrible. Look at anyone's shopping basket at the weekend it's full of drink/beer. Bottles of this bottles of that.

Do you witness many people consuming their own alcohol purchased off trade on your premises?

Yes, sure you see it yourself.

- 6) Have you been affected by "cheap booze" for example in off licences and supermarkets?

Cheap drink, bringing it in, in ship loads and selling it off, people are buying other items while there in the shop as well. Roisin Shorthall said

before the election she was going to do something about it and nothing has been done. It is one of the most disappointing things about this government in my opinion. Left publicans out to dry.

- 7) Many consumers are drinking at home first and then going straight to the night clubs, bypassing the pubs, do you agree with that statement?

No I don't I think that's a myth. Nightclubs have suffered drastically. I wouldn't like to own a nightclub now; I think the coverage charge is a huge problem.

- 8) Government intervention such as the smoking ban and drink driving limits play a major role in the alcohol industry. Firstly how do you feel the smoking ban has affected the pub trade?

I feel that's old business at this stage, people are over it. People are used to the idea of the smoking ban now. Beer gardens have become a big thing.

- 9) How do you feel the drink driving ban has affected the weekend trade and the mid-week trade?

Firstly I think the drink driving ban has absolutely closed out rural Ireland. It has closed it down. Because the rural people had a way of life and it has been taken from them and wrongly so. Drink driving ban has devastated rural Ireland. Pubs are now closing. The government have been too draconian in what they did. They should have been more pragmatic with their approach. I heard a story in my home town where a farmer was coming down a rural road coming from his local pub a few miles away and he was down coming down that road. Why would you do that? I think the government didn't do their stats there. They put a blanket ban in and that was it. It has affected the evening business here in Naas, people used to drop in for a drink after work that totally gone but it isn't as badly affected in towns. It's very much a rural thing.

- 10) Going back to the smoking ban, have you had to invest more in providing a suitable area for people to smoke, such as seating, television's etc.?

The investment in beer gardens has been huge, pubs haven't had any help with funding that either. Publicans spending 25,000 just to keep the beer garden happy. A cost that we cannot afford.

11) Do you feel non-smokers are happier visiting your premises with the ban put in place?

No question about that, they are.

12) Have you noticed an overall change in the pub culture? Are there any new trends that are emerging?

Yes, pub culture as we know it is gone. The character, the habitual drinker, the habit really is gone. Pubs are not far away from being event driving which is a terrible thing to say. People now need an excuse to go out, be it a birthday or a match and I don't like that I think that's bad. Since when I started in this business this has changed. Before I could set my clock by the repetitive customer that is no longer there. People need an excuse to go out now the recession is driving that too though.

13) Have you witnessed any reoccurring trends In terms of bank holiday weekends? How do you feel they affect sales for the following weeks?

Coastal towns and tourist destinations detriment to towns like Naas. People leave Naas and go away; inland towns suffer at bank holidays people will go to places like the west of Ireland.

14) Do you feel you have had to spend more on advertising since the recession?

Yes, spend more and I'm taking less, and that's just to stay in the game. Look this new bar here over a 100,000 spent here just like that. You have to do it.

15) Do you feel consumers perceptions of the bar trade has changed?

I like it in some ways. Yes, they are more conscious and aware of what they are drinking and the type of drink that is on offer. They are drinking less but more conscious of quality. They like their lemon their lime. Standards have risen. That's a natural thing to happen when you're spending less and conscious.

16) Do you feel the customer expects more from you during these recessionary times?

Yes.

17) Have you noticed each customer weekly spend is down?

Yes it has halved. 200 people I would have been taking in 10,000. I'd take in 5000 now. It could be down from 50 euros ahead to 25 euros

ahead. I know that for a fact. That's the type of spending that's going on now.

18) Have customers consumption patterns changed?

Three lads here last night and they had empty glasses in front of them for about 10 minutes whereas before they would have had two drank. They will only drink more if it's a party or something daft. They are drinking half of what they were drinking without a shadow of a doubt.

19) Do you feel the consumer is more in control due to the power of social media and sites such as rate my pub and trip advisor?

Yes absolutely, giving them more control.

20) How does being a manager fit in with your personal life?

Yes, I work 80hours a week morning noon and night. Last three or four years I've been in the same boat.

21) Do you feel you take work home?

Yes.

22) Do you feel that you must put effective service recovery procedures in place in order to retain that all important custom?

Yes, totally, very important, you have to think outside the box all the time.

23) Do you personally feel that maintaining a relationship with customers is effective and worthwhile, if answered yes, why?

Good question now. It's a good point. Customer service is paramount but it won't always guarantee you the business. There is no such thing as loyalty in this business. Customers are driven by social media. They are driven by re-inventing your pub like here all of a sudden were in talk again because we have done the place up. It's up to you to re-invent then and keep your pub with a cutting edge.

24) Do you have customer relationship management put in place, such as service recovery?

Yes.

25) If answered No, Is that something you will do in the future?

I have it.

26) Do you feel the whole idea of the “local” has changed?

Yes it has, habits have changed. This goes back into the habitual category; the idea of going for two pints in the local has gone. The generation now don't do that anymore, they only go to the pub if there's a reason to. It's just their habit. When I came here first to Naas I could tell you 30-40 people that would come in for three or four pints there are none of them anymore. Few maybe that go to the bookings would call in. I think it depends on class category, the working class white colour workings don't go to the local anymore, but anyone else do, they still have their habits they have (x) amount to spend and they have nothing else to do, they have a lifestyle they go to the booking and then for a few pints, in Dublin you would see those locals more, or in Kildare town, some would have 25 customers before 5 o'clock which would be 500-600 euros in the till before 5pm. That's the lifestyle of the local. I think it depends on the socio economic group, there's a little market out there with habitual habits. Pubs where I feel the majority of people are employed like here is totally different, pub across the road have a set custom during the day; go to the bookies the bookies is right beside it.

Interview Number 3:

Name: Martin Lawlor.

Date: 26/06/2013

Time: 10pm

Venue: Interviewers home.

- 1) The first question is general, how do you personally feel the economic crisis has affected the pub trade?

I feel the recession has meant a lot of job losses, it has also decreased sales.

- 2) Do you feel the recession has affected the footfall?

The footfall is actually ok at the moment because its summer time. People are in great form, the weather is nicer, so they are going to come out. But other than that the recession has affected the footfall.

- 3) If answered yes above, how has footfall affected the overall trade? Have sales dramatically decreased? Are you finding it harder to meet invoices each month?

Sales are good at the moment but wait until the winter we will see it then. The invoices and all that seems to be fine. When were not busy we don't order in as much stock etc.

- 4) Has lowering footfall, and a decrease in sales affected staff turnover?

Have you had to let some employees go?

Yes, we have had to.

- 5) Research shows that off-licence sales have increased as more consumers are purchasing alcohol in supermarkets to consume at home with friends, how do you feel this affected your business?

It's much cheaper to go into the off licence. Like a bottle of bud is 90c in an off licence where as its 4.80 in a pub, but I feel staying at home you still have to pay for your own light heat TV eventually your own water rates etc. but then on the flip side with so many people staying at home we still have huge overheads to pay for.

- 6) Do you witness many people consuming their own alcohol purchased off trade on your premises?



Yes a lot more of it now. They can't afford to buy drink, if someone wants to go out and all they have is ten euros they will bring a bottle of vodka with them.

- 7) Have you been affected by "cheap booze" for example in off licences and supermarkets?

Yes obviously people will buy the cheap booze and have house parties, but having said that having house parties isn't affecting our business as much because people will always want to go dancing so even if they have a house party until 12. They will come down to us after. Same with bbqs when they have a few drinks they will then want to go to a club etc.

- 8) Many consumers are drinking at home first and then going straight to the night clubs, bypassing the pubs, do you agree with that statement?

We are getting a little bit of that due to the coverage charge. It's free in here before 11. Years ago it used to be free in before 9pm then with the recession we had to change things around and push it until 11pm.

- 9) Government intervention such as the smoking ban and drink driving limits play a major role in the alcohol industry. Firstly how do you feel the smoking ban has affected the pub trade?

It's a complete joke. No one can give you answers in terms of what way it should be. The smoking area should be 75% open. Everywhere is totally different. Our beer garden has plenty of open space well heated etc. then we were being told the smoking area has to be a certain amount of feet away from the doors because if the door is left open to the premises the cigarette smoke is going to come in you might as well be inside.

- 10) How do you feel the drink driving ban has affected the weekend trade and the trade?

At the beginning a couple of years ago it had an affect but now I feel it's not as bad people are so used to it. I will even arrange for the staff to drop some of the local's home or for the staff to drop them home in their own car.

- 11) Going back to the smoking ban, have you had to invest more in providing a suitable area for people to smoke, such as seating, television's etc.?

You're not allowed seats or TVs in a smoking area actually, because then it would be called a smoking lounge. You're meant to have your cigarette

and go back inside you're not meant to hang around that's the theory behind the whole thing. There looking at it all from a health point of view and passive smoking.

- 12) Do you feel non-smokers are happier visiting your premises with the ban put in place?

Yes they are definitely.

- 13) Have you noticed an overall change in the pub culture? Are there any new trends that are emerging?

I feel the winter time has changed big time for the trade it's completely dead. You might as well lock the doors some nights except for a Saturday night. When the winter comes in the employees that would generally start work at 6pm won't start until nine. In order to try and give the staff hours I put someone on from 9am to 3pm and then someone from 3pm to 9pm. Then bring the rest of the staff in at 9. This change will happen for two or three days of the week. I'm not letting anyone go but I'm trying to give them all hours just cutting hours. But if we knew it was going to be a busy weekend I would have them back in at normal 6pm. The likes of a Wednesday night now I have 2 doormen on me have 6 bar men on and possibly 2 floor staff. In the winter I will have 1 doorman 2 bar staff and 1 floor staff. In the summer ill bring a DJ in whereas in the winter ill just let one of the staff go and put the music on. Friday has just totally gone now, so has teatime drinking, you could go into Kavanaghs at 5,30pm and there would be people having a drink that has gone now as well. I think the recession has had a bigger impact on teatime drinking than the drink driving ban. Before the recession I could tell you every person that came into the hotel and I could tell you exactly what time they would be in at, now since the recession and really in the last year or so if I knew 5/6 customers coming in id are lucky. Everybody else is gone. The guys buying the bottles of champagne are gone. There would be people in on a Friday night buying bottles of champagne, they may come in the odd time but they will be having a pint. The cheapest bottle of champagne at that time would be between €50-85euro.

- 14) Have you witnessed any reoccurring trends In terms of bank holiday weekends? How do you feel they affect sales for the following weeks?

I wouldn't really say the week after would have an effect but the bank holiday itself would have an effect. The June and August BH can be very bad actually because everyone tries to go away. But the people that do stay around will want to go dancing and they will usually want to go in early so that they don't have to pay the cover charge.

15) Do you feel you have had to spend more on advertising since the recession?

No.

16) Do you feel consumers perceptions of the bar trade has changed?

I feel that they are still giving the same suggestions that they always have.

17) Do you feel the customer expects more from you during these recessionary times?

Some do, they want more value for money. On a Wednesday Thursday and Sunday we have had to put on specials and drop down prices. I think though they are looking for more mid-week specials than weekend specials.

18) Have you noticed each customer weekly spend is down?

Yes that's way down,

19) Have customers consumption patterns changed?

No I think they are drinking worse.

20) Do you feel the consumer is more in control due to the power of social media and sites such as rate my pub and trip advisor?

21) How does being a manager fit in with your personal life?

I don't have a personal life anymore.

22) Do you feel you take work home?

No one rule we have in our house especially with my sons working for me, no talking shop unless it's something I forgot to do,

23) Do you feel that you must put effective service recovery procedures in place in order to retain that all important custom?

Yes I do definitely. The assistant manager generally deals with all of that. Then if needed I will see if I can assist in anyway.

24) Do you personally feel that maintaining a relationship with customers is effective and worthwhile, if answered yes, why?

Yes of course. Customers feel welcome; having the boss buying you a drink makes you feel welcome.

25) Do you have customer relationship management put in place, such as service recovery? Yes have it in place.

26) If answered No, Is that something you will do in the future?

27) Do you feel the whole idea of the “local” has changed?

No I think that’s still there. In our place any of the locals we have had we still see them the odd time. Say if you used to see them 5 nights a week you now would only see them three times a week if you’re lucky. We have one couple that we will see seven nights a week.

Interview Number 4:

Name: Karl Flood

Date: 28/06/2013

Time: 14.30pm

Venue: Graces pub, Naas.

- 1) The first question is general, how do you personally feel the economic crisis has affected the pub trade?

People spend has been completely cut, more and more people are drinking at home. I feel people are drinking much later in the night and then they are not spending in the pub. Here is a little bit different as we are a late bar people are drinking at home and then they are coming in late. We are missing out on the 8-12pm trade. Teatime drinking has completely gone we would only get our regulars at that time. I do feel however despite all of that people are starting to come back out.

- 2) Do you feel the recession has affected the footfall?

Obviously yes, I think emigration is a big factor. The majority of 18-30 year olds are in Australia or Canada.

- 3) If answered yes above, how has footfall affected the overall trade? Have sales dramatically decreased? Are you finding it harder to meet invoices each month?

Sales are down a bit. Not finding it hard to meet invoices as such though. Midweek sales are down but we do make up for it on Friday and Saturday nights.

- 4) Has lowering footfall, and a decrease in sales affected staff turnover?

Have you had to let some employees go?

Yes, we have had to let some employees go. We have let 5-6 staffs go. We have stopped serving lunch it just wasn't working out. We needed five extra staff just to do lunches and it wasn't worth it.

- 5) Research shows that off-licence sales have increased as more consumers are purchasing alcohol in supermarkets to consume at home with friends, how do you feel this affected your business?

The price of alcohol in the off licence is affecting us. You can buy a bottle of Budweiser for 70c in an off licence but its nearly 5euro in a pub.

You can tell when customers have been drinking at home. They go straight for the spirits and shots, but that's where you make your money.

- 6) Do you witness many people consuming their own alcohol purchased off trade on your premises?

With girls yes. We actually don't check bags at the moment but we might start doing that. Staff cop it, when people are ordering just soft drinks.

- 7) Have you been affected by "cheap booze" for example in off licences and supermarkets?

Yes especially with people drinking at home. Then I have also noticed that people are moaning over the prices of drink on the premises because it's so cheap in off trade.

- 8) Many consumers are drinking at home first and then going straight to the night clubs, bypassing the pubs, do you agree with that statement?

A few people would do this yes. I feel the younger crowd do this more so. The 18-21 year olds are going straight to the club because they don't want to pay the cover charge.

- 9) Government intervention such as the smoking ban and drink driving limits play a major role in the alcohol industry. Firstly how do you feel the smoking ban has affected the pub trade?

It's a good thing. It's a healthier environment to work in as well. Before it was horrible to work in a pub without the ban put in place.

- 10) How do you feel the drink driving ban has affected the weekend trade and the mid-week trade?

I don't think it has in towns such as Naas. I do feel it has in rural towns. I feel it has affected the midweek drinkers slightly especially the older generation.

- 11) Going back to the smoking ban, have you had to invest more in providing a suitable area for people to smoke, such as seating, television's etc.?

No we actually haven't we have kept it basic.

- 12) Do you feel non-smokers are happier visiting your premises with the ban put in place?

I think this is a hard one to tell because non-smokers still socialise out there.

13) Have you noticed an overall change in the pub culture? Are there any new trends that are emerging?

The home drinking is the biggest one buying alcohol in supermarkets and off licences. I think this is a huge trend.

14) Have you witnessed any reoccurring trends In terms of bank holiday weekends? How do you feel they affect sales for the following weeks?

Some bank holidays can be busier than others. However a lot of people do go away for the weekend as well so we can be very quiet.

15) Do you feel you have had to spend more on advertising since the recession?

No, we spent very little anyway. We use social media and in house advertising.

16) Do you feel consumers perceptions of the bar trade has changed?

Yes, a lot of people think pubs are greedy now due to the off trade being so cheap. So then they feel that we are too expensive.

17) Do you feel the customer expects more from you during these recessionary times?

Yes, they do. They expect something for nothing. They want more drinks promos and deals.

18) Have you noticed each customer weekly spend is down?

Yes definitely, they are budgeting what exactly they want to spend when they go out. Some people are trying to get more out of one drink. They are holding onto it for longer.

19) Have customers consumption patterns changed?

People are drinking so much more at home so that when they come into us they drink less. Some people drink more pints now than spirits.

20) Do you feel the consumer is more in control due to the power of social media and sites such as rate my pub and trip advisor?

Yes they are. It wouldn't really affect here I'd say the last post on rate my pub was back in 2012 and with trip advisor it doesn't really affect here.

21) How does being a manager fit in with your personal life?

It is very tiresome. I miss out on social events like this weekend is a close friends 30<sup>th</sup> and I can't go. I think it is very unsociable.

22) Do you feel you take work home?

Ye I do a little. There is always something to be done, I will have to do some work on Facebook and I am always on call.

23) Do you feel that you must put effective service recovery procedures in place in order to retain that all important custom?

No, the management would just deal with any complaints. The staff would pass the complaint on to me or the owner.

24) Do you personally feel that maintaining a relationship with customers is effective and worthwhile, if answered yes, why?

Yes, I feel it makes the customer feel welcome and they appreciate it.

25) Do you have customer relationship management put in place, such as service recovery?

No, we haven't out procedures like that in place.

26) If answered No, Is that something you will do in the future?

Possibly yes.

27) Do you feel the whole idea of the "local" has changed?

Yes it has. People have lost all loyalty. Customers are just moving to different pubs. They are not just sticking to one.



Interview Number 5:

Name: Alicia Farragher

Date: 10/07/2013

Time: 14.35pm

Venue: Kavanagh's pub, Naas.

- 1) The first question is general, how do you personally feel the economic crisis has affected the pub trade?

The spend is way down. People have no turned to pre-drinking. The midweek trade is totally gone before when you went out on a Monday it could nearly be like a Saturday.

The rounds have gotten smaller, people holding onto their drinks longer, people are coming in later; people aren't coming at 7.30pm and staying out for the night. Our takings are down a 1/3. People are coming in drunk. People are coming in with a few drinks on them.

- 2) Do you feel the recession has affected the footfall?

Yes definitely, Monday- Thursday are really gone even Friday is bad.

Weekend's such as Saturday is still ok they are fine. They will always be fine.

- 3) If answered yes above, how has footfall affected the overall trade? Have sales dramatically decreased? Are you finding it harder to meet invoices each month?

Sales are down but they arnt affecting invoices, you change your ways to meet them, and you tailor things to meet them. Sales have dramatically decreased in ways but you have to make changes in order to suit that.

- 4) Has lowering footfall, and a decrease in sales affected staff turnover?

Have you had to let some employees go?

In the pub now, we were overstaffed when things were good.

Ridiculously over staffed when times were good, had a manger getting lots of money and for what. Everyone was over ambitious. In the restaurant I'm struggling to find hours for the girls. I am finding actually hard to get new employees, I'm finding you have to just keep who you have.

- 5) Research shows that off-licence sales have increased as more consumers are purchasing alcohol in supermarkets to consume at home with friends, how do you feel this affected your business?

It has affected the early evening trade. Tesco has affected more than the small off licence. You can buy slabs off beer in the supermarket for nothing. Big supermarkets is what's killing everyone, there all doing well but small off licences aren't.

- 6) Do you witness many people consuming their own alcohol purchased off trade on your premises?

Yes, at the weekends, groups, girls are worse than boys, girls of ever age group well dressed women are all doing it. Men don't really do it.

- 7) Have you been affected by "cheap booze" for example in off licences and supermarkets?

Yes, everyone has.

- 8) Many consumers are drinking at home first and then going straight to the night clubs, bypassing the pubs, do you agree with that statement?

Yes the younger people are doing that. Not so much middle aged people. Middle aged people love going out for a proper night out they loved getting dressed up, I used to love pre-drinking myself but you get too drunk.

- 9) Government intervention such as the smoking ban and drink driving limits play a major role in the alcohol industry. Firstly how do you feel the smoking ban has affected the pub trade?

Hugely it has, but then they created the hole "smoking area" as well, at the start the ban had an effect, initially it did kill us, we were one of the lucky pubs we have so much outdoor space compared to other pubs in fact we benefited from it we were the only pub in Naas that utilised it straight away we did it up, got heaters in, so in that sense.

People are over it now, but smoking isn't cool anymore. I hate personally sitting inside.

- 10) How do you feel the drink driving ban has affected the weekend trade and the mid-week trade?

Hugely, I don't agree with drink driving but in small little rural towns it's terrible, a man can't go and have their quiet pint it has affected them, in

terms of the town it hasn't really affected, it has closed half of the rural pubs down.

11) Going back to the smoking ban, have you had to invest more in providing a suitable area for people to smoke, such as seating, television's etc.?

Had to invest a lot more, a huge amount, we had to put in outdoor furniture, a suitable ground, lighting, sound systems we have to have a contractor come once a year to maintain all of the plants out here. Huge expenditures.

12) Do you feel non-smokers are happier visiting your premises with the ban put in place?

I feel they don't care anymore, it's old news.

13) Have you noticed an overall change in the pub culture? Are there any new trends that are emerging?

Offers, we need to put offers on every weekend, special cocktail special beer, people want more, want everything for nothing, that's more food though than drink.

14) Have you witnessed any reoccurring trends in terms of bank holiday weekends? How do you feel they affect sales for the following weeks?

Not really, not at all really, we still get a run at it but our clientele do like to go away but whoever hasn't gone away still like to go out,

15) Do you feel you have had to spend more on advertising since the recession?

Yes we never advertised before, I think maybe we advertised once, now we're using social media, newspapers, looking at Google ad words. We need to have it; we also have to have it. You need to spend more can't just sit back.

16) Do you feel consumers' perceptions of the bar trade has changed?

A lot of people have this perception that the publican is struggling, before they thought that they were well off but now they are not well to do anymore.

17) Do you feel the customer expects more from you during these recessionary times?

Yes 100%, I feel they are chancing their arms more, they will moan about the price of a pint, they take longer to pay. They are slow to take out their

money. In terms of food that has gone really bad in terms of complaints. They want more and more offers.

18) Have you noticed each customer weekly spend is down?

Weekly spend is down, especially with all of the men their friends arnt out as much. Lot of the customers are having kids etc. changing. People are staying at home, or they are going to the gym, they are walking, cycling, rather than going for pints. Lifestyles have changed.

19) Have customers consumption patterns changed?

I feel people are binge drinking. When they go out they go mad. They get absolutely locked.

20) Do you feel the consumer is more in control due to the power of social media and sites such as rate my pub and trip advisor?

Yes, (felt strong) trip advisor greatest nuisance, I think trip advisor should be closed down it has ruined everything. People not going to a restaurant because it got a bad review on trip advisor. There are good little restaurants suffering and getting bashed, half of the staff are writing up reviews. It's giving people too much power. It making people believe they are a connoisseur of everything. I feel it has changed consumer behaviour people are looking for something to go wrong when they come out. 100% too much power. Businesses suing etc.

21) How does being a manager fit in with your personal life?

You have no life, you don't have much life. You have to enjoy it or else it wouldn't be worth it, but everyone here is a great team and that makes it easier. You have random days off and stuff, it also means if you work hard for 4 weeks you can then take a week off, that's what me and my brother do.

22) Do you feel you take work home?

Yes, it's a family business. We try not to though as well. When we go out we have rules not to talk about the pub, but my dad ends up throwing something in there. Of course we do though it's hard not to.

23) Do you feel that you must put effective service recovery procedures in place in order to retain that all important custom?

No, deal with them as they come, no one deals with them apart from managers, I feel staff shouldn't have to ever feel uncomfortable dealing

with them. Only managers should deal with complaints or problems, so staff shouldn't have to deal with that.

24) Do you personally feel that maintaining a relationship with customers is effective and worthwhile, if answered yes, why?

Yes definitely in this trade, everyone knows everyone. It's good for everyone when they come in to know everyone we have our Friday evening crowds now and our Saturday evening crowds etc. 100% it needs to be maintained but also important to build new ones as well. I also feel there shouldn't be any clicks in a pub and not giving anyone preferential treatment over anyone else. Treat everyone the same.

25) Do you have customer relationship management put in place, such as service recovery?

No, we haven't put procedures like that in place.

26) If answered No, Is that something you will do in the future?

Deal with them as they come.

27) Do you feel the whole idea of the "local" has changed?

Ye it has definitely. It is still a little bit there, everyone has so many locals, our crowd would hop between here Hayden's and McCormack's. There are good pubs and good choices now. Even me I'm an absolute pub hopper myself I love different crowds. I think the local is there mid-week but not weekends, like ye we do have our set crowds but they will still drink in other pubs before they come here.

## **Appendix 2: Customer interviews:**

**The interviewer:** First of all I would like to thank you for taking part in this research. The research is for my thesis, which examines the effects of the recession on the pub trade focusing particularly on the Naas area. If there are any questions you would like me to repeat or explain in greater just ask. So we shall begin, I have questions here with me. .

The questions asked in the customer interviews are as follows:

- 1) How often would you socialise?
- 2) Where do you socialise?
- 3) Would you avail of special offers advertised in supermarkets and off licences?
- 4) Would you consider yourself a late drinker?
- 5) How do you feel the drink driving ban has affected you personally?
- 6) Do you smoke?
- 7) If yes, how do you feel the smoking ban has affected you?
- 8) If no, do you still socialise in smoking areas?
- 9) Do you feel smoking areas are adequate in terms of seating, lighting heating, etc.
- 10) How do you feel the pub trade has changed since the recession?
- 11) Do you feel your consumption patterns have changed?
- 12) Do you drink more or less?
- 13) How often do you socialise at home?
- 14) What is your opinion of the price of drink on trade vs. off trade?
- 15) When socialising at home where would you buy purchase your alcohol?
- 16) How much do you spend weekly on alcohol?
- 17) Has this changed since the recession?
- 18) Would you use sites like trip advisor or rate my pub?
- 19) Would you trust their reviews?
- 20) Do you feel less people are socialising in pubs?
- 21) Would you go to the pub during the week for a quiet drink?
- 22) If you were in the supermarket and you saw special offers on alcohol would you pick it up to have for future events?
- 23) Would you pick up drink say after a stressful day at work?
- 24) In your opinion has the consumption pattern of your peers/colleagues/families changed?
- 25) Would you witness many people taking drink into pubs on their person that they purchased off trade?
- 26) Do you feel the whole idea around the “local” has changed?
- 27) Do you feel many people are by passing the pub and going straight to nightclubs?
- 28) Would you pre drink at home before you go out?

Name: Pat Palmer.

Date: 24/06/2013

Time: 13.48pm

Venue: Interviewee's home.

- 1) How often would you socialise?  
Once a week
- 2) Where do you socialise?  
In restaurants and in the locality where I live, Naas.
- 3) Would you avail of special offers advertised in supermarkets and off licences?  
I would avail of special offers if I saw them I like to have stuff in.
- 4) Would you consider yourself a late drinker?  
No, I am an early drinker, I like to get out early and get home early.
- 5) How do you feel the drink driving ban has affected you personally?  
I feel since the drink driving ban I think twice before I drink. The ban has curtails your movement I don't however disagree with it. Its good but I need to organise who the designated driver will be before we go out. I think taxis are way too expensive,
- 6) Do you smoke?  
No I don't anymore
- 7) If yes, how do you feel the smoking ban has affected you?
- 8) If no, do you still socialise in smoking areas?  
I do still socialise in smoking areas
- 9) Do you feel smoking areas are adequate in terms of seating, lighting heating, etc.  
No I do feel they can be quiet cold, they are sometimes in the wrong place. Smoking itself is very social you do talk to people outside that you would probably never speak to when you're sitting around a table inside the pub. I can understand though how it is inconvenient for smokers.
- 10) How do you feel the pub trade has changed since the recession?  
I think there is definitely more good value out there there's more value for money you could say. The pubs aren't as crowded as they used to be. You can see pubs trying to get more customers in.
- 11) Do you feel your consumption patterns have changed?  
Yes, they have, drink has gone more expensive, and I don't have the spending power anymore,
- 12) Do you drink more or less?  
I drink less; I would drink less in a pub but more at home.
- 13) How often do you socialise at home?

Most weekends I would socialise at home, I think it's nicer to sit at home with a glass of wine, especially in winter it's nicer, it's warmer, you can watch TV or read a book. And also you're not spending lots of money.

14) What is your opinion of the price of drink on trade vs. off trade?

There is a huge difference in the price, in the supermarkets there is great value I feel you still need some pleasures at a good price. In pubs I feel it's very expensive but I can see why the wages and overheads are so high.

15) When socialising at home where would you buy purchase your alcohol?

I would purchase it in the local supermarket or the off-licence.

16) How much do you spend weekly on alcohol?

For drinking at home I would spend €10 a week but when I'm out I would spend €50. So there's a huge difference to staying at home to going out.

17) Has this changed since the recession?

Yes most definitely. Huge difference since the recession.

18) Would you use sites like trip advisor or rate my pub?

No not unless I was going down the country or abroad.

19) Would you trust their reviews?

Yes, I would. I feel the comments are very trustworthy.

20) Do you feel less people are socialising in pubs?

Oh yes.

21) Would you go to the pub during the week for a quiet drink?

No I wouldn't because of the drink driving ban I would be afraid, and I also have to be up early.

22) If you were in the supermarket and you saw special offers on alcohol would you pick it up to have for future events?

Yes

23) Would you pick up drink say after a stressful day at work?

No I would just drink what I have at home.

24) In your opinion has the consumption pattern of your peers/colleagues/families changed?

Yes less drink is consumed due to expense and costs in their life.

25) Would you witness many people taking drink into pubs on their person that they purchased off trade?

Oh yes most definitely I see people purchasing a soft drink then going out to the corner of the smoking area and topping it up. But I did see that in pre recessionary times to.

26) Do you feel the whole idea around the "local" has changed?

Yes, some people still have their local it's the nicest place of all I think. You will always know someone there. Staff will know you; I like going in and the staff knowing your drink straight away without you having to even ask. You don't feel like you're a stranger. It's just a lovely touch the staff knowing you.

27) Do you feel many people are by passing the pub and going straight to nightclubs?



I feel that everyone loves going to a pub even young people. They may not spend the whole night there just maybe have one or two drinks and then go to the club.

28) Would you pre drink at home before you go out?

No

29) Reoccurring trends?

The midweek trade has gone. And consumers have changed they are more in control.

Name: Tom O' Dwyer

Date: 23/06/2013

Time: 14.15pm

Venue: Interviewee's home.

- 1) How often would you socialise?  
Once a week
- 2) Where do you socialise?  
In my locality, in the town in which I live.
- 3) Would you avail of special offers advertised in supermarkets and off licences?  
I wouldn't drink at home that often.
- 4) Would you consider yourself a late drinker?  
No, definitely not I like to go out early to get home early I also like to go out early to get a seat and the pubs are quieter and more relaxing at that time of evening.
- 5) How do you feel the drink driving ban has affected you personally?  
The drink driving has affected me a lot personally actually. I won't drink at all during the week. I drive for a living and I don't want to have the smell of alcohol on my breath.
- 6) Do you smoke?  
No.
- 7) If yes, how do you feel the smoking ban has affected you?
- 8) If no, do you still socialise in smoking areas?  
I do still socialise in smoking areas, I do feel that the smoking ban at the start when it was first introduced I felt that the ban divided people. It separated the smokers from the non-smokers. When it came in all smokers left together and went outside where it is more relaxed people will now go outside on their own their used to the ban now. I feel smoking ban has made the pubs cleaner and also major health benefits no more passive smoking, my clothes and hair doesn't smell anymore either when I am in a pub, and the pub isn't discoloured from the smoke.
- 9) Do you feel smoking areas are adequate in terms of seating, lighting heating, etc.  
Yes most of them are. However a few things I would change are adding more bins not just ashtrays and small buckets but proper bins, there is always litter and cigarette butts in some smoking areas. So basically the heat the lighting the seating etc. is all fine but the refuse is terrible.
- 10) How do you feel the pub trade has changed since the recession?  
It is definitely quieter, more people are drinking, the drinking at home is becoming huge, and it's very popular. The midweek trade has gone, there is no atmosphere anymore. However the weekends are still busy, but people are

still less and going out later. If there were over a 100 people in the pub you may only need 2 staff to serve them whereas before the recession you would need more than 5 staff to serve 100 people. People are holding onto their drinks longer to get more value out of them. I have worked in the pub trade for years, I grew up in pubs and now as customer in one the spending is definitely less. 50 euro is really all people are spending on a night out where as this was never the case before. I also feel the whole “teatime” drinking I call it has gone. The teatime hours say 20 years ago were between 5-7pm. People were either waiting for the traffic to move before they went home or they wanted to have a drink before they went home to unwind. Then at 7pm the teatime drinkers would head home. What I’m trying to say is having a few drinks after work is gone and this is back to the drink driving ban, families, and money, I know personally I don’t go for after work drinks anymore because my family situation has changed I want to get home to the kids and see them before bed.

11) Do you feel your consumption patterns have changed?

My consumption patterns have not changed, now my wife wouldn’t drink as much, she would have wine in the evening but that’s about it. I still like to go out at weekends.

12) Do you drink more or less?

The same.

13) How often do you socialise at home?

Very rarely I would socialise at home, say ten years ago when we first bought the house we had lots of parties but now with the kids etc. we don’t.

14) What is your opinion of the price of drink on trade vs. off trade?

The off trade prices are too cheap, especially in supermarkets, they shouldn’t be allowed sell it that cheap, there is definitely more regulation needed. I feel the same with tobacco. Say for example with the off licence you can buy 24 cans for €20 it is really killing the pub trade.

15) When socialising at home where would you buy purchase your alcohol?

I would buy my alcohol in the local off licence I want to support them over the supermarket. I just do not buy alcohol in supermarkets. I feel off licences are designed to sell the alcohol, even if it costs more ill buy it to support them.

16) How much do you spend weekly on alcohol?

€30 would be spent on wine for my wife, another €10 on beers, and then every second week I would spend €60 in pubs.

17) Has this changed since the recession?

I would drink more when I’m away from home or on holidays. But in terms of my spend say 10years ago has changed and this is really down to my personal situation in terms of kids, mortgage, bills etc. 10 years ago I would socialise three days a week. Now it’s every fortnight. When I used to go out three times a week I would socialise for shorter periods of time so only a few

hours a night, whereas now when I go out I try and get the maximum out of it. Because I don't know where I will stand week to week.

18) Would you use sites like trip advisor or rate my pub?

No I wouldn't use it for pubs locally, but definitely if I was travelling down the country or abroad I would use it.

19) Would you trust their reviews?

No, I do feel sometimes, the comments are cynical enough; I do feel some of the positive comments can be put up by friends of the owner and so on. I do feel customers only hear what they want to hear.

20) Do you feel less people are socialising in pubs?

As a customer I feel people are still going out everyone still socialises to some extent, just not as much as they used to.

I work in a local pub one night a week as well as my fulltime job and I feel as an employee yes less people are socializing I see the same faces the whole time, there are a set of regulars that are always there.

21) Would you go to the pub during the week for a quiet drink?

No, I wouldn't really I drive for a living during the week and going back to the drink driving ban I wouldn't want a smell of alcohol of my breath etc.

22) If you were in the supermarket and you saw special offers on alcohol would you pick it up to have for future events?

I would if it was in the off licence.

23) Would you pick up drink say after a stressful day at work?

Yes I would pick up some alcohol if it was very stressful whereas before if it was stressful I would call into the pub for one but that has completely changed due to my personal situation.

24) In your opinion has the consumption pattern of your peers/colleagues/families changed?

Yes definitely with my colleagues like we used to organise nights out every few months I'd say it was over two years since we last went out as a group. However, when I go in on a Monday morning there are still stories of who went where at the weekend. My family grew up in pubs but they were never heavy drinkers but they are drinking that little bit less.

25) Would you witness many people taking drink into pubs on their person that they purchased off trade?

I feel it has actually gone down a bit, it's easier for women to do it they have their handbag I would never see a male doing this or never heard of a male doing it, when I'm in work you would find nag ins in the toilet at the end of the night.

26) Do you feel the whole idea around the "local" has changed?

Yes I feel it has definitely changed, in the 50's 60' and 70's the whole idea of the local was very big. The local was developed when the bug housing estates were built. The reason I feel this has changed is because there are better transport links available so if you want to try somewhere new, you can hop on a bus/luas and go there. People like trying out new places. The local was a

place in 50'-70's that you went to have a chat with your neighbours and unwind. But as mentioned previously the drink driving ban also affected this, if you live say a few miles outside the town unless you have a lift to bring you to and from the pub during the week it's not worth it. In Naas with the bus service more and more people are going into Dublin.

27) Do you feel many people are by passing the pub and going straight to nightclubs?

I wouldn't personally bypass the pub to go to a nightclub I prefer pubs to socialise in.

28) Would you pre drink at home before you go out?

No I wouldn't.

29) Do you notice any re-occurring trends in the pub trade?

I notice from working in this trade for years when I was younger that people are very set in their ways, my dad for example has been drinking a pint of smith wicks for as long as I can remember. I see now the younger generations are more adventurous. They are willing to change where they drink and what they drink. There are more craft beers available; I would say that these craft beers are a trend. The consistency in products has changed. The variability for customers is constantly changing. I see that pubs are outing in more eye-catching beer taps small things like that to catch customer's eyes.

30) Change in customer?

Customers are more cynical and in control. Customers also don't mind being seen to buy a bottle of wine for €8 whereas before when people had more money they wouldn't think twice about buying a bottle of wine for 30 euro jus to be seen with it. This has all changed though people are watching what they are spending. People did though spend over the odds for drink before the recession.

Notes: I just want to add I feel the licencing laws for pubs should be changed, I feel pubs should be allowed apply for a floating licence this basically means open for a set 12 hours whenever they want. So say from 3pm to 3am. This would work for the pub that I work one night a week in. it costs too much to open early in the morning. I also feel that pubs opening and closing at different times would stop people from all spilling out onto the street at the one time each night.

I also remember working in a pub in town, and a when drink went up in the 90's there was uproar that say two drinks were over 5 pounds whereas now you would only get yourself a pint of larger for just under five euros.

Name: Grainne Ryan 23

Date: 24/06/2013

Time: 17.12pm

Venue: Interviewee's home.

- 1) How often would you socialise?  
5-6 times a month.
- 2) Where do you socialise?  
It depends on what day of the week it is, if Wednesday, Thursday or Sunday it would be a pub but a Friday or Saturday night it would be a night club.
- 3) Would you avail of special offers advertised in supermarkets and off licences?  
Yes, but only if it's my regular drink I wouldn't buy a random drink just because it's on offer.
- 4) Would you consider yourself a late drinker?  
Yes I am a late drinker; if I have work to do before I go out I prefer to do it first
- 5) How do you feel the drink driving ban has affected you personally?  
Well I only started driving so it doesn't affect me, but I can see how it affects others with how low the measures are. You can't even have 2 drinks. It is a deterrent to go out, taxis are so expensive, and it honestly would put someone off going out and staying in instead.
- 6) Do you smoke?  
No
- 7) If yes, how do you feel the smoking ban has affected you?
- 8) If no, do you still socialise in smoking areas?  
Yes I still would, it sometimes can be too loud to talk inside I feel there's actually more craic out there.
- 9) Do you feel smoking areas are adequate in terms of seating, lighting heating, etc.  
Yes they are adequate in the last few years especially I feel that they have gotten better, they are comfortable, nice couches.
- 10) How do you feel the pub trade has changed since the recession?  
I feel it has become more competitive there are so many more promotions and special offers available. They are trying to get more people in. they have invested in doing the pubs, however I feel drink prices haven't moved. The competition with off licenses has also grown. There are putting on more live music as well since the recession.
- 11) Do you feel your consumption patterns have changed?  
Not really, because I'm older and earning more money I wouldn't same they have changed.
- 12) Do you drink more or less?

More because I'm older

13) How often do you socialise at home?

Not often maybe just a couple of times of month.

14) What is your opinion of the price of drink on trade vs. off trade?

You can buy a bottle of vodka and a mixer for cheap, and there are excellent offers on beer in off licences. Whereas in a pub a handful of vodkas are more expensive than the bottle and mixers you can buy off trade. You can buy a can for less than a euro in an off licence but a pint in a pub is just under €5.

15) When socialising at home where would you buy purchase your alcohol?

I would buy drink to be honest where ever it is cheaper. If the off licence is cheaper I will go there but I'd really shop around.

16) How much do you spend weekly on alcohol?

Roughly €10-15

17) Has this changed since the recession?

No actually because of my age I wouldn't have been drinking pre recessionary times, and now that I'm working part time etc. I can afford to have a few drinks.

18) Would you use sites like trip advisor or rate my pub?

No only if I'm going abroad or say the west of Ireland.

19) Would you trust their reviews?

Yes I would I don't believe they are biased.

20) Do you feel less people are socialising in pubs?

I feel that's it's more a different generation that aren't but I do feel that my generation still is. However, people may still socialise in pubs but they also choose to socialise at home more because it's so much cheaper.

21) Would you go to the pub during the week for a quiet drink?

Yes I would but not very often, if there was an occasion I would go to celebrate.

22) If you were in the supermarket and you saw special offers on alcohol would you pick it up to have for future events?

Yes I would just to have some in the fridge.

23) Would you pick up drink say after a stressful day at work?

No I wouldn't

24) In your opinion has the consumption pattern of your peers/colleagues/families changed?

Yes they have.

25) Would you witness many people taking drink into pubs on their person that they purchased off trade?

No not really

26) Do you feel the whole idea around the "local" has changed?

For a lot of people it has, it's a longer distance to go now to your local pub. I do feel there's now too much choice it's hard to settle to just one local, also because of bigger towns there isn't just one pub people go to.

27) Do you feel many people are by passing the pub and going straight to nightclubs?

Yes when they drink at home, pre drinking basically, they will go straight to the club, if there's a coverage charge on the club then I won't go to the pub at all I'll go straight to get in free.

28) Would you pre drink at home before you go out?

Yes. It's cheaper

29) Are there any re-occurring trends you have noticed?

What I have noticed is that pubs are busier when there is an event or an occasion so the likes of Christmas, bank holidays, and the races more people will go to the pub. Some people can't afford to go away so they are socialising in their local town for the bank holiday. Pubs themselves are trying to do more to drive people into pubs.



Emma McDonald.

Date: 01/07/2013

Time: 12.30pm

Venue: Interviewers home.

- 1) How often would you socialise?  
Nearly every weekend.
- 2) Where do you socialise?  
Either Naas or Maynooth, that's mainly where my age group go and it's also easy to get there, with transport etc.
- 3) Would you avail of special offers advertised in supermarkets and off licences?  
No I wouldn't avail of them. I stick to the same drink all the time so I wouldn't just buy something for the sake of it.
- 4) Would you consider yourself a late drinker?  
I'm a mid-way drinking. I go out between 9.30pm and 10pm.
- 5) How do you feel the drink driving ban has affected you personally?  
It hasn't at all. I would never drink and get into my car. There are always taxis. You would never be stuck you would always be able to get a way home.
- 6) Do you smoke?  
No.
- 7) If yes, how do you feel the smoking ban has affected you?
- 8) If no, do you still socialise in smoking areas?  
Yes, that would be the main place I would hang out. That's where everyone goes. Not as crowded out there and its good craic.
- 9) Do you feel smoking areas are adequate in terms of seating, lighting heating, etc.  
Yes.
- 10) How do you feel the pub trade has changed since the recession?  
Well I don't go to the pub really I drink at home and go straight to the night club. The odd time I might just go to the pub. It's just too expensive to drink in the pub and then go to the nightclub. I'd rather drink at home. It's cheaper.
- 11) Do you feel your consumption patterns have changed?  
I drink more now because I'm drinking at home but before you would be in the pub and you would watch what you're having etc.
- 12) Do you drink more or less?  
So I drink more.
- 13) How often do you socialise at home?

- No never stay in and drink there I would pre-drink at home.
- 14) What is your opinion of the price of drink on trade vs. off trade?  
I feel it's expensive for what you get out of a bottle in the pub. What they're (pub) buying it for and what you're getting out of it is different. In an off licence it seems cheap enough for what you get out of it.
- 15) When socialising at home where would you buy purchase your alcohol?  
I'd buy in a supermarket over the off licence because the supermarket offers the cheaper brands whereas the off licence doesn't. They just have the branded products.
- 16) How much do you spend weekly on alcohol?  
I would spend €50 on alcohol then €20 more goes on cover charge if needed and then the taxi.
- 17) Has this changed since the recession?  
I'm more conscious on what I spend than before, when I started going out I had no bother bringing out about €80 and id spend it all. When I first went to time and I was working in Reiss that's what I'd spend. I'd bring that much money to cover myself in case, but then I'd go mad if I came home with nothing. I do feel that I was such a waste.
- 18) Would you use sites like trip advisor or rate my pub?  
No
- 19) Would you trust their reviews?  
Well it depends. There can be a lot of mixed reviews, if there were more bad than good it might be more believable but if they were in between I wouldn't know.
- 20) Do you feel less people are socialising in pubs?  
Yes definitely, they just can't afford it everyone stays at home to pre-drink. I mean everybody does it. I aim to be early in someone's house to have time to pre-drink.
- 21) Would you go to the pub during the week for a quiet drink?  
Maybe just during the summer. People are on holidays everyone is finished college. In the winter you wouldn't be bothered. In the summer you go out to the beer garden.
- 22) If you were in the supermarket and you saw special offers on alcohol would you pick it up to have for future events?  
No I wouldn't I only buy when I need. I wouldn't be thinking ahead.
- 23) Would you pick up drink say after a stressful day at work?  
No.
- 24) In your opinion has the consumption pattern of your peers/colleagues/families changed?  
Yes they are definitely drinking less. They rarely go out they only go out for occasions.
- 25) Would you witness many people taking drink into pubs on their person that they purchased off trade?

Yes, everyone does it. I see it in the bathroom, bottles left there at the end of the night. It's the cheap way out all you have to do then is buy your mixer.

Sure you get two drinks out of a mixer. Mixer is over €2, 2.50 or 2.80.

26) Do you feel the whole idea around the "local" has changed?

I think it's gone; people don't have the money to go to the local and spend how they used to. I feel they only go to their local when they need to. When there's something on, or maybe going for a few quiet drinks once a month.

27) Do you feel many people are by passing the pub and going straight to nightclubs?

Yes most definitely.

28) Would you pre drink at home before you go out?

Yes, most definitely I make sure to have time to pre-drink, I will go to someone's house early enough to do so.

29) Re occurring trends anything you have noticed? Or would like to mention?

I think there are a lot more drinks promotions. If the promotions are on something I like it's great, I will then drink more of it or if there's a special on cocktails I'll go for that just because it's the cheaper option rather than your own drink that you usually get. I feel the pubs are doing this to try make back some money I'd say they have had a serious loss over the last few years. I feel they also want to do something different to keep the customers happy.

Name: Miriam Dowling

Date: 03/07/2013

Time: 15.30pm

- 1) How often would you socialise?  
I wouldn't socialise regularly at all, maybe once a month.
- 2) Where do you socialise?  
I'd socialise more in restaurants or café bars not as much pubs or clubs. I'm not a big drinker, and the people I socialise with wouldn't be big drinkers either. I'm more likely to go to the cinema or for something to eat.
- 3) Would you avail of special offers advertised in supermarkets and off licences?  
No not really I don't drink at home and I would then associate purchasing alcohol in the supermarket with home drinking.
- 4) Would you consider yourself a late drinker?  
No, early maybe around 8pm.
- 5) How do you feel the drink driving ban has affected you personally?  
It hasn't I don't drive.
- 6) Do you smoke?  
No.
- 7) If yes, how do you feel the smoking ban has affected you?
- 8) If no, do you still socialise in smoking areas?  
Yes, I would, if my friends were all out in the smoking area smoking there's no point sitting inside on my own when they are all out there.
- 9) Do you feel smoking areas are adequate in terms of seating, lighting heating, etc.  
Yes they have improved a lot in the last few years. Before the ban it was literally the footpath outside. It's better now with the ban though you used to come home stinking of smoke. You would have to have a shower before you went to bed.
- 10) How do you feel the pub trade has changed since the recession?  
There are more deals they are now forced to try and entice people in, because alcohol is now so cheap in the off licence.
- 11) Do you feel your consumption patterns have changed?  
Yes, people seem to drink to get drunk and not purely for socialising.
- 12) Do you drink more or less?  
Less. I drank a lot more in my twenties. But as I realised it wasn't adding anything to my life I drank less and less.
- 13) How often do you socialise at home?  
Not at all really. I prefer to get out of the house to socialise.
- 14) What is your opinion of the price of drink on trade vs. off trade?

Pubs are quite expensive, especially when it comes to spirits. Off licenses seem to be getting cheaper all the time, particularly in the supermarket sector.

- 15) When socialising at home where would you buy purchase your alcohol?  
My local off license.
- 16) How much do you spend weekly on alcohol?  
I don't buy alcohol on a weekly or even monthly basis. If I do buy alcohol, it's usually a bottle of wine for about €12-14.
- 17) Has this changed since the recession?  
No
- 18) Would you use sites like trip advisor or rate my pub?  
I would use trip advisor. I didn't even know rate my pub existed.
- 19) Would you trust their reviews?  
Yes, I do.
- 20) Do you feel less people are socialising in pubs?  
Yes definitely.
- 21) Would you go to the pub during the week for a quiet drink?  
No I wouldn't, I'm not around people that would do that and I wouldn't go on my own. It's different for older men they would.
- 22) If you were in the supermarket and you saw special offers on alcohol would you pick it up to have for future events?  
If I knew there was an occasion coming up and I saw a special offer yeah definitely I would. Or if I was buying a present and I saw an offer then I would. I'd have to have something in mind I wouldn't just buy it.
- 23) Would you pick up drink say after a stressful day at work?  
No I'm more likely to go for chocolate.
- 24) In your opinion has the consumption pattern of your peers/colleagues/families changed?  
Not particularly, I think it's more they have gotten older and that has caused there consumption patterns to change. When my sister was in her 20's she was drinking a lot more then than she is now. And I know people in their 20's and they are still drinking as much.
- 25) Would you witness many people taking drink into pubs on their person that they purchased off trade?  
No I wouldn't, but then again I wouldn't be in pubs enough to notice it. I do hear of people doing it alright.
- 26) Do you feel the whole idea around the "local" has changed?  
That is not as strong. My dad wouldn't drink at home years ago; he would come home and go straight to the pub. Whereas now my dad drinks at home. It was a thing middle aged men used to do. He just used to like going down and having a pint. The local was in my area just about 5 minutes away so there was no need for a lift or to take the car.
- 27) Do you feel many people are by passing the pub and going straight to nightclubs?

Well I wouldn't know because I don't go to clubs but my understanding of it is that people drink at home and then go out at like 12 o'clock at night. So then they are not spending as much in clubs because they have had their fill.

28) Would you pre-drink at home before you go out?

No I don't pre-drink.

29) Re-occurring trends?

There has been a change in the consumer but not due to the recession I feel people are drinking more and drinking younger. In the last ten years it has changed, people are now drinking to get drunk rather than to enjoy it.