

The Domestic Death of a Global Icon? A Situational Analysis of the Irish Public House

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Abstract

The public house has formed an intrinsic part of the Irish way of life for centuries, but it may soon be gone due to changes in demographics, alcohol consumption, and other variables including psychographic and geographic factors. Changes in Irish society during the rise in affluence characteristic of the Celtic Tiger era, and applicable Government policies have all played a role in altering the Irish pub culture. This research examines the current situation of the public house market in Ireland today with an aim of recommending some viable solutions to this declining industry. Government intervention in the future will be a key issue in order to address the imbalance in the retail alcohol market through corrective regulation. A quantitative approach was applied in this study and the research questionnaire yielded 316 responses representing a cross section of Irish society today. The findings reveal that there is an increased incidence of 'at-home' alcohol consumption, especially due to economic factors and the availability of cheaper alcohol from retail outlets. Respondents indicate that public houses did not represent 'value for money' anymore, and were perceived as being out-dated and unwelcoming. The findings reveal that publicans need to analyse their local market, diversify and innovate to generate new business, in order to survive and reverse the demise of the Irish public house. This study will be of benefit to the hospitality industry, Industry trade associations e.g., Vintners Federation of Ireland, Licensed Vintners Association, Government bodies, policy makers and the Irish Hospitality Institute.

Keywords: Licensed Trade, Public house, Vintners, Publicans, Alcohol consumption, Post Celtic Tiger alcohol consumption, Irish drinking culture

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Introduction

The public house is part of a living tradition in Ireland. It is deep-rooted in a unique culture spanning many centuries, yet currently it appears its death knell may be tolling. This icon of Irish life is in serious danger of disappearing forever, and with its demise an intrinsic part of the social fabric of Ireland will be gone forever. The retail alcohol & beverage sector in Ireland has been adversely affected with a drift in consumption from ‘on sales’ in public houses to ‘off sales’ drinking in a home environment. The consumption of alcohol at home as an alternative to going to the pub is currently accelerating rapidly, with almost a quarter of all Irish consumers ‘going out to the pub’ less. Modern Ireland has undergone extensive social and economic changes in a few decades and the current economic recession is having a tumultuous effect on Irish society and lifestyle choices. The Irish people have evolved and people’s ‘needs and wants’ are no longer being met by the Irish public house. This study is an examination of the Irish public house in the current economic climate and the factors that have contributed to the continuous decline in alcohol sales in the on-trade. We examine the factors that have led to the demise of Irish public houses, including the economic downturn, the changing trends of alcohol consumption, the changes in legislation, the impact of the smoking ban and other factors such as the quality of home entertainment available today. This study further examines the current role of the pub in Irish society and explores the trends and issues that are facing the licensed trade sector. The public house occupies a very special place in the culture and history of Ireland and, at present, its prospects, in many geographical settings, are bleak. To date, other research conducted was primarily concerned with the business side of the public house from the perspective of publicans and various publican associations, and not from the customer perspective; therefore, this study concentrated on the view of the consumer.

Methodology

‘The Domestic Death of a Global Icon?’— A situational analysis of the Irish Public House presents a research study on the Irish public house with an exploration as to its demise in modern day Ireland. Extensive primary and secondary research was conducted as part of this empirical study into the Irish public house.

Initially, during the preparation of the research a qualitative approach was to be undertaken; however, upon completion of secondary research the direction was redirected to study the role of the consumer in the demise of the public house and the motivations behind the changes. Therefore, a quantitative approach was undertaken in order to gather comprehensive knowledge which ultimately aided answering the research question. The questionnaire was designed to be conducted on a random sample group to measure accurately the public's perception of the Irish pub and their attitudes as customers of pubs or as consumers of alcohol.

Quantitative research includes a substantial amount of literature at the beginning of a study to provide direction for the research question (Creswell, 2002). In this model, the quantitative researcher utilised the literature deductively as a framework for the research question. A survey was chosen to measure customers attitudes to Irish pubs. The target population included 319 participants ranging in age from 18 years to over 60 years of age, and with a gender balance of 53.8% female and 46.2% male. The target population were contacted by email, social media and face to face in public houses. A questionnaire structure was recognised as the most appropriate approach for data collection. Following extensive research along with pilot questionnaires, a final questionnaire survey was composed. A total of 319 responses were collected, 3 of which were eliminated, due to being incomplete. 97 of these questionnaires were manually conducted by the researchers in various public houses on four separate occasions.

The use of an on-line survey was utilised through the on-line survey tool, Survey Monkey, resulting in the collection of 222 further responses, using social media and email groups. All questionnaire data was then inputted manually to Survey Monkey by the researcher. According to Domegan and Fleming (2003), tools such as Survey Monkey allow researchers to create their own survey using an on-line editor. It enables researchers to track results as they are collected in real time and the application allows ease of production of results. The questionnaire was designed to incorporate imperative questions that were relevant to the literature researched to date on the subject and novel questions unique to this current study. Quantitative research design is a definitive mechanism for finalising results and proving or disproving a hypothesis. After statistical analysis of the results, a comprehensive answer is reached, and the results can be evaluated accordingly.

Quantitative tests also filter out external factors when properly designed, and so the results gained are relative and unbiased.

Literature

General Overview of the Licensed Trade in Ireland

Cunningham (2010) believes that the Irish 'love affair' with the public house has declined in recent years, as the flirtation with a glass of wine or a beer on the sofa at home becomes a growing habit. The Irish pub, according to *Lonely Planet* is the country's number-one attraction. Yet, it is also doomed; health campaigners have its products in their cross-hairs, but the truth is that many of us are increasingly indifferent to its long-standing charms, (Cullen, 2012: 13).

"The Irish pub is dying. Is there any hope that it can be revived? Does anybody really care? Or are we ready to wave good bye to it and embrace healthier habits that don't involve consuming expensive alcohol in public? According to publicans, there is worse to come and some are predicting the death of the Irish pub entirely. Publicans say the blame rests with below-cost sales of alcohol in the big supermarkets", (Pope, 2011:19). O'Keeffe, (2011) reinforces this by defining the pub sector as being in a 'crisis situation' with no sign of market conditions improving. It is not all that long since the pub held Irish society in thrall. Birthday, communion and funeral ceremonies would eventually make their way to its darkened interiors, (Cullen, 2012:1). Cullen further points out that pubs are closing at a rate of one every two days, more than 1,100 since 2005. Their decline has frequently been cited as yet another example of rural decay, but pubs in all areas and of all types are calling time, (Cullen, 2012:2). Throughout its history the Irish pub has faced many challenges on all levels, increasingly in the present climate, with the demise of the Celtic Tiger and the introduction of the smoking ban, but with so many public houses throughout the island of Ireland and thousands more springing up throughout the world in an attempt to recapture its authenticity, it may be able to withstand the threat, and again flourish, (Sharkey, 2009).

Current Crisis in the Public House Sector

In 2012, according to the Revenue Commissioners license premises data, there were 7,616 public houses, 931 hotel and other public bars, 416 restaurants with full licenses and 2,017 restaurants with wine licenses in Ireland, (Pope, 2011:8). In 2011, the pub industry employed 50,000 people in Ireland, according to the VFI, (2011). Previously in 2009, the pub industry had formed an integral part of the Irish economy and society on a whole, with over 80,000 people employed in the drinks industry (including alcohol production and distribution) with a worth €6.6 billion, of which €2bn approx. comprised of excise duty and VAT, (CSO, 2009).

The industry is however deteriorating swiftly with a 14% drop in drink sales in 2010 subsequent to a decline of 8.8% for the entire twelve months of 2009. DIGI, (2011) estimates that one public house per day closed in 2010 leading to the loss of 7,000 jobs in the sector. According to Foley, (2012) the national economic environment in Ireland continued to be weak in 2011 with an unemployment rate of 14% leading to a drop in discretionary and disposable incomes. 1,300 licensed premises have closed their doors in the preceding five years to 2011 (Doorley, 2011).

The Importance of the Public House to Irish Society

The American sociologist Oldenburg, (1999) has stressed the importance within modern societies of the so called 'third place'. These are informal public settings that are not work and not home: rather a public place where people can easily meet, relax and interact. Pubs are one of a number of these third places which in Ireland, have long provided a non-domestic social space, (Kearns, 1996). According to Oldenburg, (1999:43-65), individuals benefit from third places in as much as they are exposed to novelty, gain a better perspective on life, are socially re-invigorated after the travails of work or home and are able to generate and sustain generalised friendships. Watson, (2002:190) suggests that 'public drinking houses of one kind or another have been important sites of social, political and economic exchange in almost every type of society'. Kearns, (1996:3) describes the pub as the 'epicentre' and a true microcosm of social life, reflecting the socio-economic ethos of its host community. The local pub has been compared to the local church: the 'snug' often being referred to as the 'confessional' and the barman as the 'priest', (Share, 2003:76).

Closures of Public Houses

The consumption of alcohol has dropped by about one-fifth in a decade, but it still plays a central part in Irish life (VFI, 2011). The problem for publicans is that more and more drink is being consumed at home, and not in licensed premises. According to research by Dublin City University economist Foley for the Drinks Industry Group Ireland, a decade ago, up to 80 per cent of drink was sold in the on-trade (pubs and other venues); today, it accounts for less than half of all sales, (DIGI, 2011). Alcohol is a substantial part of consumer expenditure but its share has been declining, (CSO, 2002). According to O’Keeffe (2010), VFI CEO Cribben said that research by DIGI found pub sales had decreased by 14.6% in the first five months of 2010; "the decline of the industry has affected the live register to the tune of 20,000 people in the last few years,". A 14% decrease in Pub drink sales was recorded in the first 6 months of 2010, (O’Keeffe, 2010). This is on top of an 8.8% decrease in 2009, (CSO, 2010). National accounts data from the CSO also show the importance of beverage expenditure in total consumer expenditure. The alcohol share of personal consumption has declined in recent years. It was 10.9% in 1997 compared to 9.7% in 2000, and 8.0% in 2006 (CSO National Accounts, 2007).

Excise Duty

More than 1,000 rural pubs did not renew their license in 2010, amid fears that most are simply shutting their doors due to the recession and new drink-driving limits. The ‘meltdown’ in the pub trade has been blamed on the smoking ban, a reduction in drink-driving limits and the availability of cheap alcohol in supermarkets, (Kerr, 2010). In 2009, Ireland’s high taxation levels on alcohol led to substantial cross border trade to Northern Ireland on ‘booze runs’. The Irish government counteracted this trend by reducing excise duty, (DIGI, 2010). Excise duty is “A European Union excise regime governing the production, processing and holding of excisable products under duty-suspension, within each Member State as well as all intra-Union movement of excisable products, (Revenue Commissioners, 2012). The reduction in excise duty clearly worked as the decrease in on-trade sales was offset by a double digit growth in off-trade sales. This resulted in an increase in total drinks sales of 6.4% in the first six months of 2010 (DIGI, 2010).

Competition with Alcohol Sold by the off-Trade

Ingle, (2010) reported that in Ireland in 2000, three-quarters of alcoholic drink was consumed in the confines of the public house. According to Foley (2012:13), in 2009 volume shares were estimated to be approximately 50% on-licence and 50% off-licence. By 2010, the off-licence share had increased to about 56%, however with a further reduction in on-sales of 6.0% recorded in 2011 and an overall increase in alcohol sales of 0.17%, it is now estimated that alcohol sales in Ireland currently are 62% off-trade and 38% on trade. which is a vast change to the overall industry.

The single biggest reason that Irish pubs are struggling is because of their prices, (Walsh, 2010). According to Pope (2010), supermarkets are flooding the market with cheap alcohol; the result is that it now costs 50 per cent less to drink at home than it did in 1996. While the price of everything else was rising at sometimes frightening speeds during the boom years, the cost of alcohol, (a thing that might be considered fairly integral to Irish society) was falling dramatically. While the price of drinking in a pub has increased by well over 300 per cent since 1996, the cost of alcohol in an off-licence has fallen precipitously and, in real terms, it now costs more than 50 per cent less to drink at home than it did in 1996, (Pope, 2010). According to the Rand report (2010), commissioned by the European Commission's Department of Health, Ireland is one of six countries in the EU where alcohol has become over 50 per cent more affordable than it was fifteen years ago. Furthermore, alcohol prices in Ireland are falling at a much faster rate than average prices. According to CSO figures, alcohol prices fell by 4.6 per cent in Ireland between July 2009 and July 2010, while average prices fell by only 0.1 per cent, (Pope, 2010).

The alcohol market in Ireland is worth over €6 billion a year and the off-sales element is used as a loss leader by supermarkets whose biggest challenge is to coax people through their doors. Using cheap booze as bait, they then maximise their profits elsewhere in the stores. Tesco alone controls more than 50 per cent of the off-licence trade in Ireland (Pope, 2011). According to O'Keeffe, (2012: 1) an Oireachtas health committee have backed proposals to introduce a minimum price for alcohol. The proposal calls on the Irish Government to end the practice of refunding supermarkets Value Added Tax (VAT) on alcohol sold below cost, (O'Keeffe, 2012: 1). The VFI, (2010) blame below cost selling of alcohol by retail outlets as the cause of the on-going public house closures and resulting job losses.

A Changed Alcohol Consumption Culture

Hanson (2005) states that historically, a high rate of drinking was observed among the Irish in the 1800's. It is said that these individuals drank because they were Irish. Now, some descendants of the Irish continue to live the stereotype; for them it represents Irish-ness - they drink because they are Irish (Hanson, 2005). Accepting that the pub has had an influence over Irish culture as a whole and that it defines us as a nation whether we like it or not will be necessary if we are to move away from the debauched drinking that has become all too prevalent (McCormack, 2005). Ireland's drinking culture has been a topic that has been under the spotlight for quite a while. Junior Health Minister Roisin Shortall plans to introduce minimum pricing for alcohol, but it's unclear whether that will make much of a difference to a nation that is determined to keep drinking. Alcohol use and related harm is now a major public health problem in Ireland (O'Connell *et al.*, 2003).

Drink Driving

Ireland has a chronic drink driving problem, according to the Road Safety Authority of Ireland, (2010). Bedford *et al.*, (2004) found that of the total number of drivers killed, a third had alcohol detected in their blood, and a quarter of drivers were above the legal limit. All drivers detected with alcohol in their blood were male. Bedford, *et al.*, (2005) reported that alcohol is estimated to be a contributory factor in 1 in 3 fatal collisions. In 1994, the year that the Blood Alcohol Concentration (BAC) level was reduced to 0.80mg, a reduction in road deaths and alcohol related road deaths were also recorded (HSE, 2008). New legislation was introduced in October 2011 further reducing BAC levels for drivers, with the Irish Minister of Transport Leo Varadkar, stating that the new measures sent out a very clear signal that drinking and driving "cannot be tolerated and will be prosecuted", (in Edwards, 2011). According to Breaking News (2010), this new legislation was introduced despite strong opposition from publicans and the Vintners' Association who say that the lower limit will be the 'final nail in the coffin' for the pub industry. The Vintners Federation of Ireland had called for softening of legislation to avoid the collapse of the industry, (Breaking News, 2010).

Health

Alcohol Action Ireland, (2010) the national charity for alcohol-related issues, stated that the Government's decision to keep alcohol excise duty at the same very low levels as 2009, as "incomprehensible" in the current climate of fierce cuts to essential services. Alcohol Action outlined that "the Government cut excise duty on alcohol and that resulted in the loss of millions in badly-needed tax revenue for the Exchequer (2010). "We are now facing savage cuts to essential services and tax and levy hikes but the price of alcohol, a luxury good, will remain the same. Cheap alcohol carries a high cost that the Irish tax payer's end up paying. Alcohol-related harm costs this country around €3.7 billion a year including health, absenteeism and crime-related costs. That is €3,318 for everyone paying income tax. It is a myth that alcohol in this country is expensive", (Alcohol Action Ireland, 2010). "In Ireland, it is possible to get drunk for as little as €6, with cans of beer selling for 66c each or less, wine for €4, and bottles of vodka retailing at €12. It's possible for a woman to reach her low risk drinking limit for just €6.30 a week and a man can do so for less than €10, (Pope, 2011). International research shows that the most effective strategies are enforcing alcohol control and making publicans liable for damages when they serve an intoxicated customer. Also effective, are limits on the hours and days of alcohol sale, and putting the government in charge of off-licences, (Burns, 2003).

Smoking Ban

A ban on smoking in public places in Ireland was introduced by the Tobacco Smoking (Prohibition) Regulations 2003, (Citizens Information, 2011). It was opposed by the licensed trade on the grounds that it would have a 'detrimental effect' on their business, (O' Callaghan and O' Riordan, 2012). Official figures from Dublin show that country pubs were shutting at a record rate. Nearly 440 fewer pub licences were issued or renewed in 2006 compared to in 2005 for example; this is the steepest fall recorded in the Republic of Ireland (Lister, 2007). The greatest numbers of closures were in remote communities along the West Coast. Up to 1,000 rural bars are now thought to have shut since the ban came into effect in 2004. While the ban has been welcomed by tourists and health campaigners, and has led to an increase in business in many city pubs, it has caused problems for those that depend heavily on local trade.

Although a range of factors from a crackdown on drink-driving to rises in beer prices are to blame for the fall in custom, landlords say that they have failed to recover from the smoking ban's introduction, (Lister, 2007).

Irish Pubs are only Good for Export

We celebrate the Irish pub as part of our cultural heritage and we have exported the "Irish pub concept" to almost every major city in the world, (Molloy, 2002). The Irish pub is part of a living tradition; it is part of our unique culture and it deserves to be cherished and celebrated (Molloy, 2002). According to O'Sullivan, the 2002 President of the Vintners Federation of Ireland research shows that tourists to this country consistently report that a visit to an Irish pub is part of what makes a holiday in this country special, (in VFI, 2002).

Main Findings

Every town, village or parish in Ireland has a ghost public house, shuttered and empty shells that once anchored the social life of the community that lived or worked around it, (Hennessey, 2011).

Key Points

The following key findings are based on 316 responses from a cross section of Irish society.

The public house particularly in rural Ireland, has always been a focal meeting point where people of all walks of life felt free to wander in and spend as much time as they liked chatting and socialising with people from the surrounding area. It didn't matter what you were wearing or how much you consumed and everybody knew each other. In the rural area I live in, the public house was the centre of the community. You always knew what was happening in the area and got to know the local people. As a result of drink driving restrictions, morning after breathalysing and the cost of drink, this is no longer the case as the pubs are empty, (Rural participant).

1. Public houses are more important to the community in rural places. In line with the literature this study has found that many have now closed with a considerable social loss to the community. 64% stated that they felt the public house was no longer at the 'centre of the community', but this figure reduced dramatically for those residing in more rural areas compared to city or suburb dwellers. One rural dweller outlines that my pub is still the centre of the community and is the hub of a strong social capital phenomenon. Good local pubs still work to make their locals feel welcome.
2. "The Irish are famed for creating the greatest pubs on the planet. In Irish pubs, pint glasses are always half full, the crack is always ninety, and the night is always young", (Cullen, 2012:12). In general, the findings of this research did not support Cullen. The perception of the public house in this study was predominantly negative with responses indicating that the public house had not moved with the changing culture of the Irish people and had not responded to consumers changing tastes and requirements. One participant is philosophical about the demise; they lost their soul and just became big profit spaces rather than nice cosy locals.
97% of respondents in this study consumed alcohol but 77% were more likely to drink alcohol in a home environment today. According to one participant, pubs will have to react and provide a better service and range of food and beverages, whilst also competing on price with each other.
3. 91% indicated that government legislation on smoking, drink-driving and the lowering of the blood alcohol from 80mg to 50mg per 100ml of blood has had a considerable impact on their decision not to visit the pub; this finding is in line with current literature on the topic. The following participant outlines that drink driving restrictions, the smoking ban and unemployment along with lack of money has played a large part in the demise of many local public houses. People are afraid to take a drink and drive and the smoking ban has deterred many from socialising in public houses.
4. 89% of participants 'strongly agreed' or 'agreed' that socialising in a public house had become too expensive. People don't have the money to spend on alcohol in public houses as it is too expensive and much cheaper to purchases in off-licence etc.

This is a disappointing finding as the literature suggests that the perception is that the Irish are considered synonymous with socialising in an Irish pub and this adds to the attraction for tourists to visit the Irish pub.

5. 90% of those surveyed indicated that unemployment and a drop in their discretionary and disposable income had led to non-attendance at public houses in recent years. This correlates with the finding that the prices of alcohol are too high in public houses. One participant relays that people can't afford to drink in public houses anymore, so the centre of community remains at the side of the local pitches at the weekends.
6. Many of those surveyed felt that the public house had lost its appeal and charm and had become uninviting or that public houses have lost their 'soul' and have just become big profit spaces rather than nice cosy locals. With the demise of the rural pub as outlined in the literature, this situation will become even more prevalent in the future. One participant notes that Irish public houses have become very quiet, boring, overpriced, and there is little or no initiative whatsoever on behalf of most owners/management to encourage business. A good public house—now a rare gem, some will survive, but far less than before, and only in strong communities where the publican is business savvy and makes the pub atmosphere entertaining enough to draw a crowd.

Key Recommendations

- The retail alcohol market requires corrective legislation to address the imbalance in pricing.
- Publicans should analyse their local market, diversify and innovate to generate new business. Diversification of their product offering to include good food, speciality beers, quality wine by the glass, and hot beverages throughout the day is now deemed essential.
- Rural public houses were considered to be still at the centre of the community with some stating that many city centre premises were all decoration and no charm. Urban public houses should strive to retain some of the atmosphere and distinctive character of the traditional pub.

- With ‘off-trade’ sales being inflated by the increased incidence of ‘binge drinking’ in the 19 to 29 year old age group and the corresponding damage to health and well-being, an age appropriate drink awareness campaign should form an integral part of the curriculum of second and third level students to encourage the responsible consumption of alcohol.

Conclusion

Demand for Irish-style boozers abroad is so high that, on average, one new Irish theme pub is opening up every three days, (Bramhill, 2012).

Ironically, at a time when ‘The Irish Pub’ is being recognised in every corner of the globe as a unique experience worthy of a branding that not only boosts tourism but draws attention to all aspects of Ireland and Irish life, the future of the indigenous Irish public house is in a state of ‘meltdown’, and in the words of the Vintners Association the business is ‘crippled by legislation’. Approximately 1,300 pubs closed their doors between 2005 and 2011. The extensive challenges faced by the industry are not insurmountable but collective strategic thinking and creative business acumen is urgently needed if this icon of Irish culture and social life is not only to survive, but also to thrive by consolidating and increasing its revenue. By forging a turnaround in its fortunes, it can continue to make a valuable contribution to the economic life of the state through employment, taxes, and take its well-deserved and long-standing position in the increasingly vital & valuable tourism sector of our economy. The ultimate question is: Is there a political will to reverse the darkness for Irish publicans?

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