



Quantum Change in Irish Drinks Culture

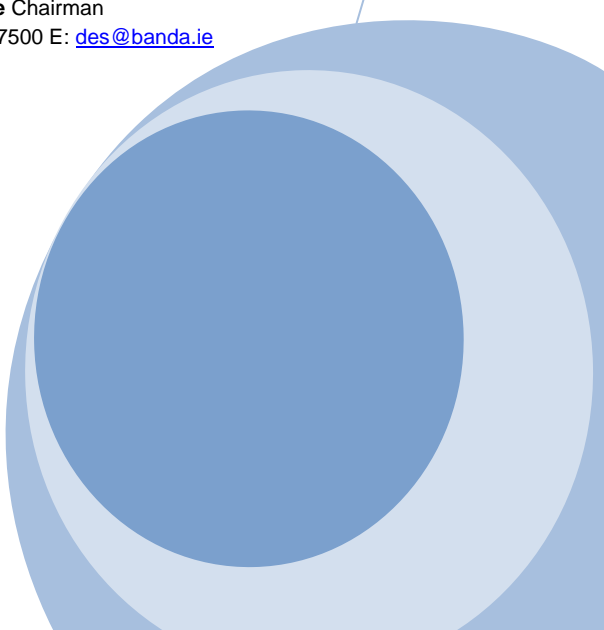
Report September 2010

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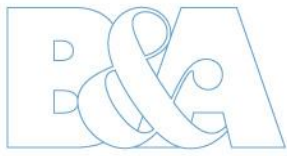
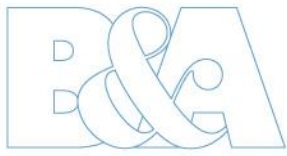


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1. Introduction

The latest Consumer Watch report from Ireland's leading independent research company- Behaviour & Attitudes- highlights the quantum change that has occurred in the Irish Drinks Culture in the last decade. It also draws attention to a new phenomenon- Pre-Drinking- the practice of having a few drinks at home before going to the pub.

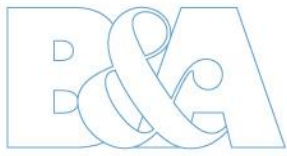
The survey was carried out using the Behaviour & Attitudes Barometer Survey. This is a syndicated survey allowing client companies cost effective access to a nationally representative sample of 1,000 adults. The survey is conducted fortnightly, using a fresh sample of respondents each time. The sample is quota controlled by all of the normal demographic variables to correctly reflect the known characteristics of the adult population of the Republic of Ireland.

All interviewing was carried out on a face-to-face basis by trained members of the Behaviour & Attitudes field force working under supervision and within the guidelines set by the Marketing Society of Ireland and ESOMAR.

The data for this study derives from a Barometer Phase with fieldwork between 6th - 17th August, 2010.

A copy of the questionnaire used for the survey is included as an appendix to this report.

Additional tabular data is available on request from luke@banda.ie



2. About Behaviour & Attitudes

Behaviour and Attitudes is Ireland's largest and most experienced independently owned research company. We have 30 permanent staff members including 10 directors, the most experienced team in the Irish market. In addition, we have a team of over 150 experienced, fully trained face-to-face interviewers nationwide. Our Dublin CATI (telephone) Unit is based in our offices in Milltown and has a capacity of over 75 interviewers.

Established 25 years ago, Behaviour and Attitudes provides a full range of market research services, ranging from CAPI (Computer Aided Personal Interviewing), through to standard face-to-face interviewing surveys, CATI (Computer Aided Telephone Interviewing), central location interviewing, as well as an in-house CAWI Unit (Computer Aided Web Interviewing). The company would be well known for having pioneered the development of qualitative research in Ireland.

Despite being the second largest market research company in Ireland, Behaviour & Attitudes has a very well defined and tight company structure which is built around excellent client service delivery principles.

Behaviour & Attitudes is fully owned by its 10 Directors. These Directors are continuously involved in day-to-day research on behalf of their clients. Hence, our clients have access to the most senior team in the Irish marketplace.

For more information please visit our website at: www.banda.ie

Findings

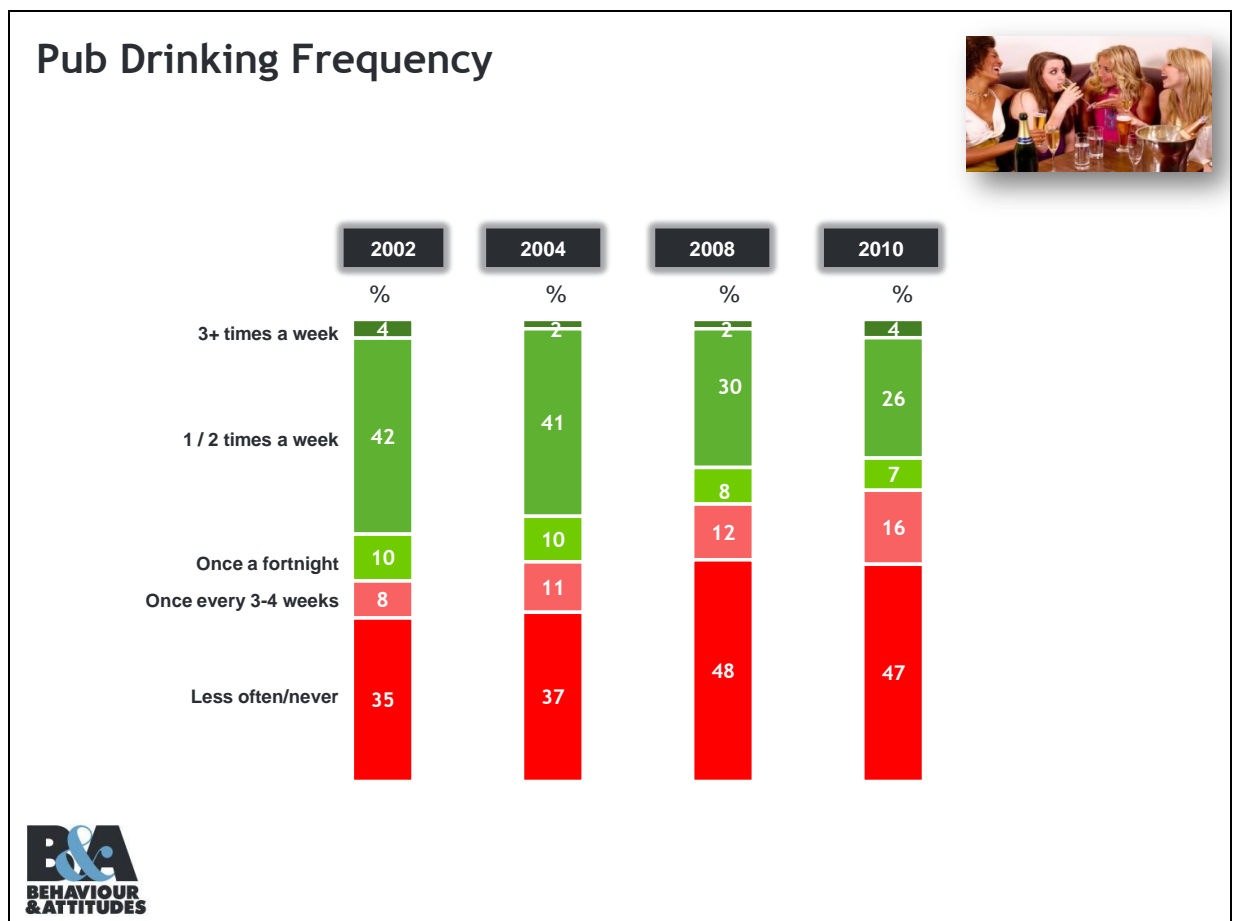


3. The Demise of the Irish Pub

The archetype of the Irish drinker is of a regular pub goer who loves his (for they are primarily male) pint. Traditionally drinking at home was for weddings, christenings or visits by the local parish priest.

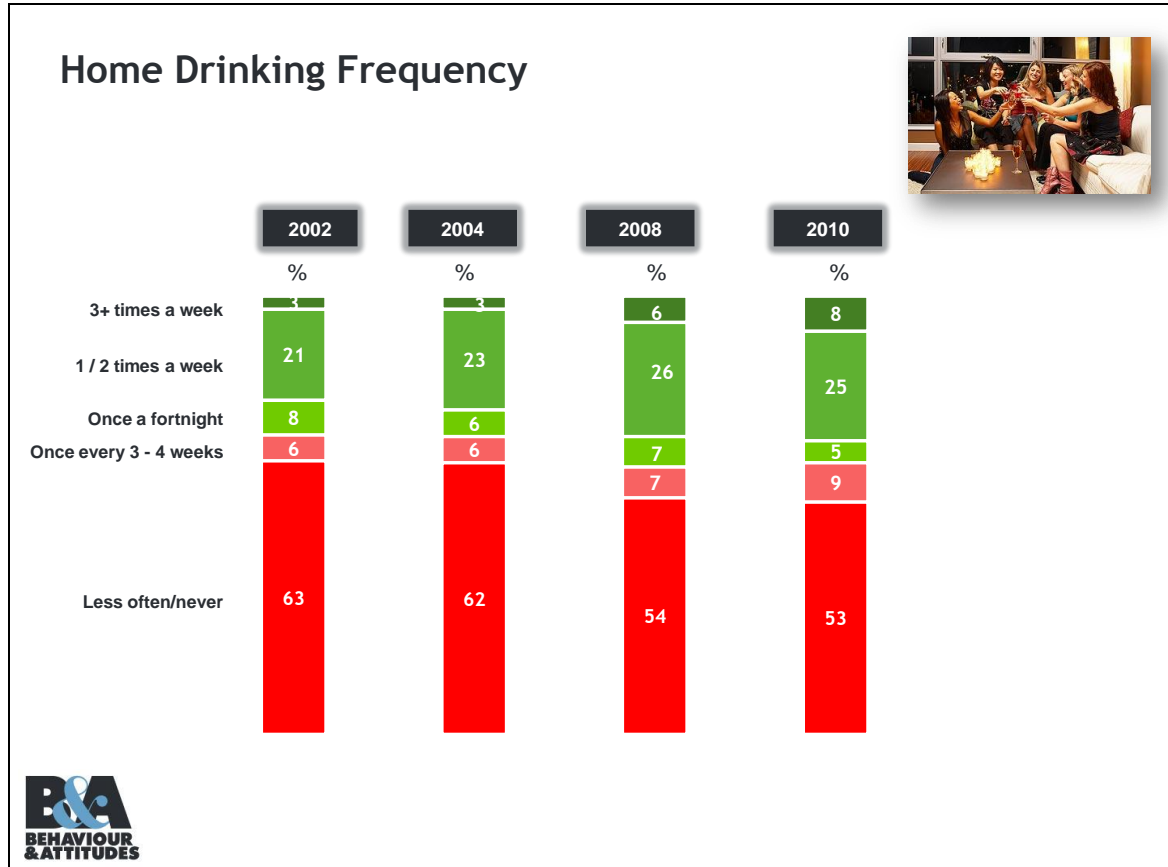
How things have changed in the Celtic Tiger years and in the subsequent Crash.

Irish people are drinking “on- trade”- in pubs, bars, and hotels much less often now, than they were at the beginning of the decade.

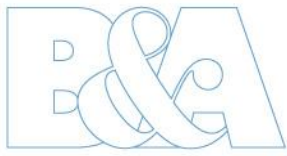


In 2002 two out of every three Irish adults went to the pub to drink alcohol once a month or more often. Today only half the population do so. The decline has been even more marked if we focus on people who go to the pub once a week or more often.

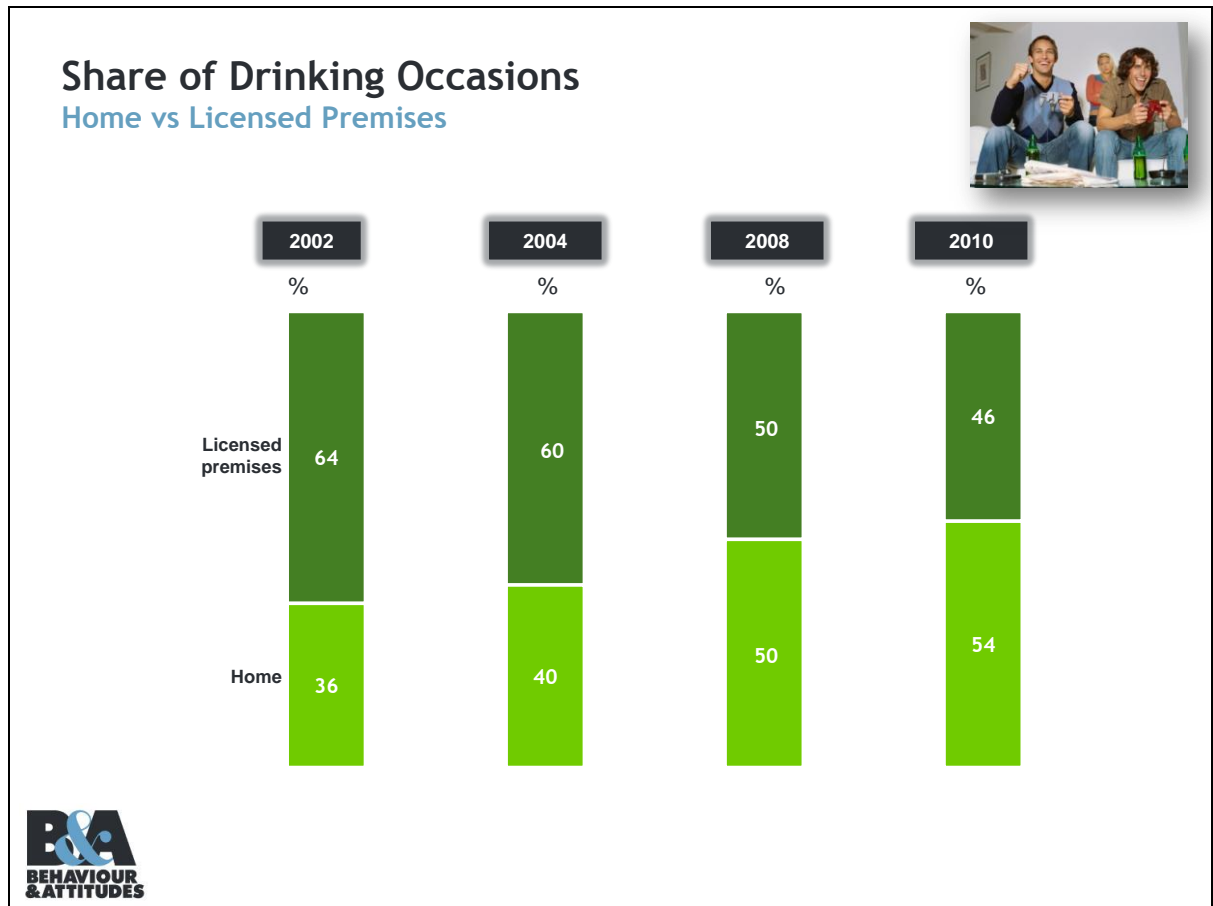
At the same time there has been a rapid rise in home drinking.



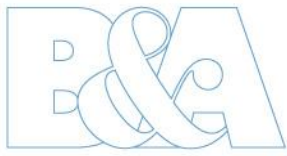
There are more people drinking at home than in pubs on a weekly basis. (33% at home vs. 30% in pub) The difference is even more acute if we focus on those drinking three or more times a week- 8% at home vs. 4% in pubs.



Indeed, if we gross up the relative frequencies reported in these charts we see a dramatic shift in the share of alcohol drinking occasions taking place at home as against licensed premises. The position is as follows.



The share attributed to licensed premises has fallen from 64% to 46% over an eight year time span.



4. Pre-Drinking: A new phenomenon

The trend towards home drinking has been underway for some time and has been influenced by many factors- drink driving legislation, relative pricing on vs off trade, and latterly, anti smoking regulations. However it does appear there has been a sharp acceleration in the trend recently. We believe that the major accelerant has been a phenomenon reported with increasing frequency in our focus group work- the habit of having a few drinks at home before going to the pub- which we refer to as Pre -Drinking.

The psychology of this occasion had different motivations to typical 'at home' consumption - more high energy, sociable, with a sense of togetherness and fun.

This is the first time, to the best of our knowledge, that this phenomenon has been measured in a quantitative manner.

5. Prevalence

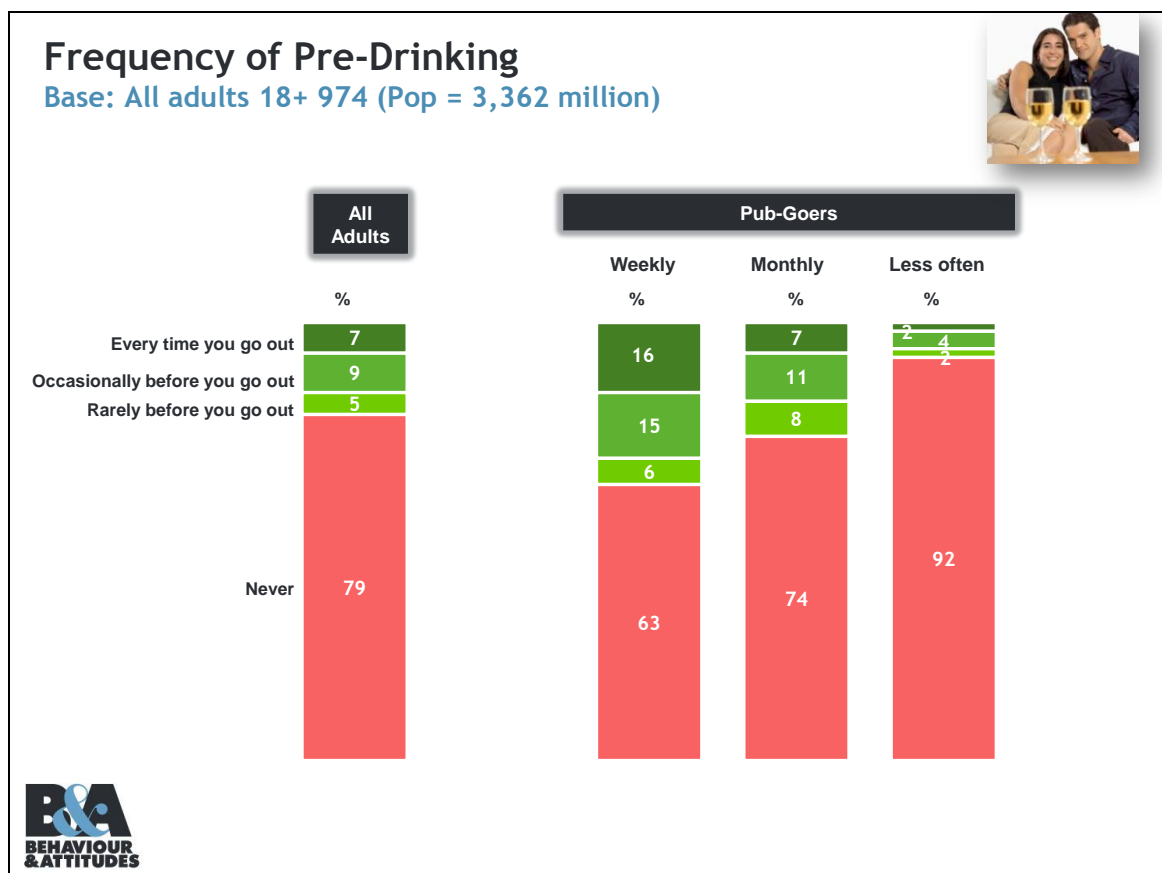
How prevalent is Pre-Drinking?

To avoid any confusion, we explained Pre- Drinking to our survey respondents as follows:

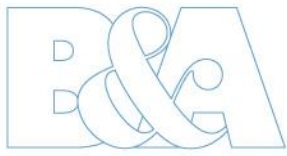
“We hear that some people nowadays, when they are going out for a drink, sometimes have a few drinks beforehand at home or in somebody else’s home flat or apartment. This tends to be called Pre-Drinking.”

Q.3 How often, if at all nowadays do you have pre drinks of this kind?

This is what we found-

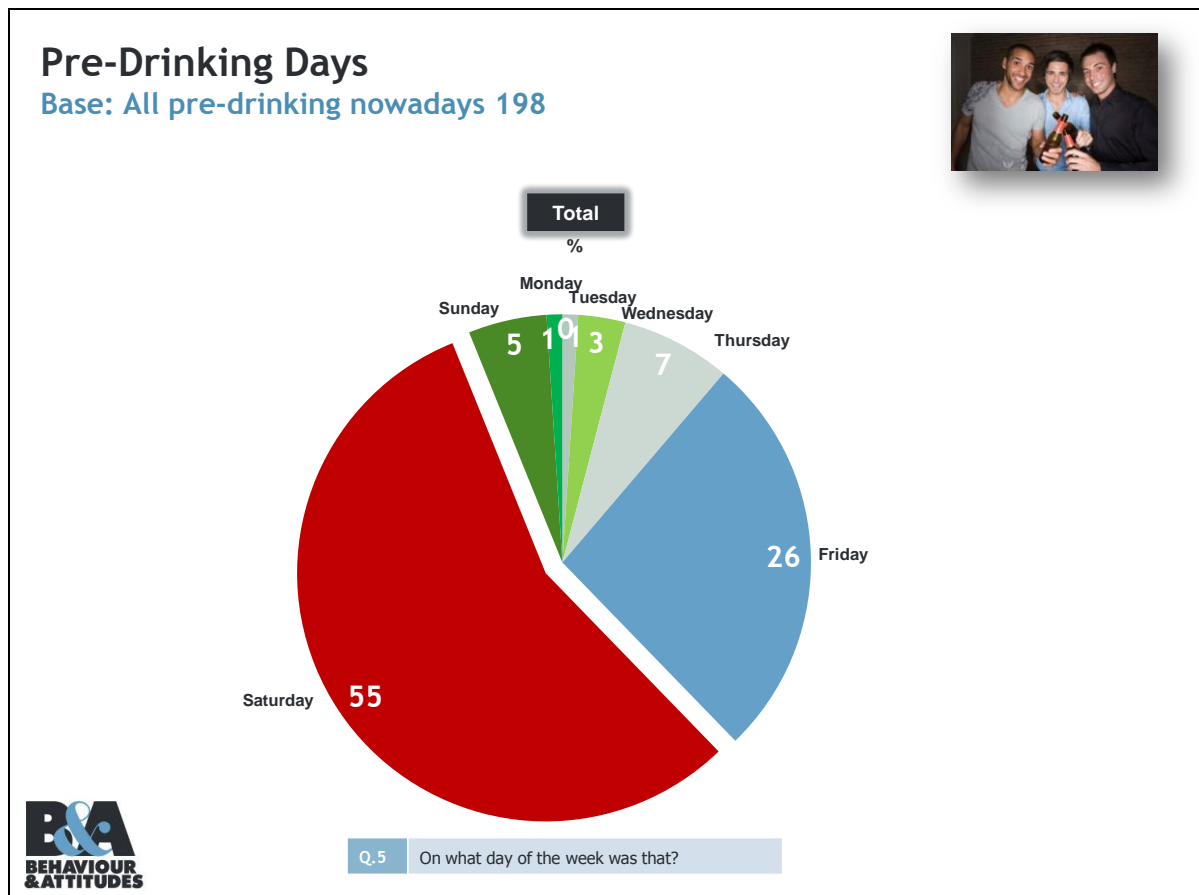


In simple terms this suggests that almost a quarter of a million adults pre-drink every time they visit a pub, and almost half a million do so occasionally or rarely.



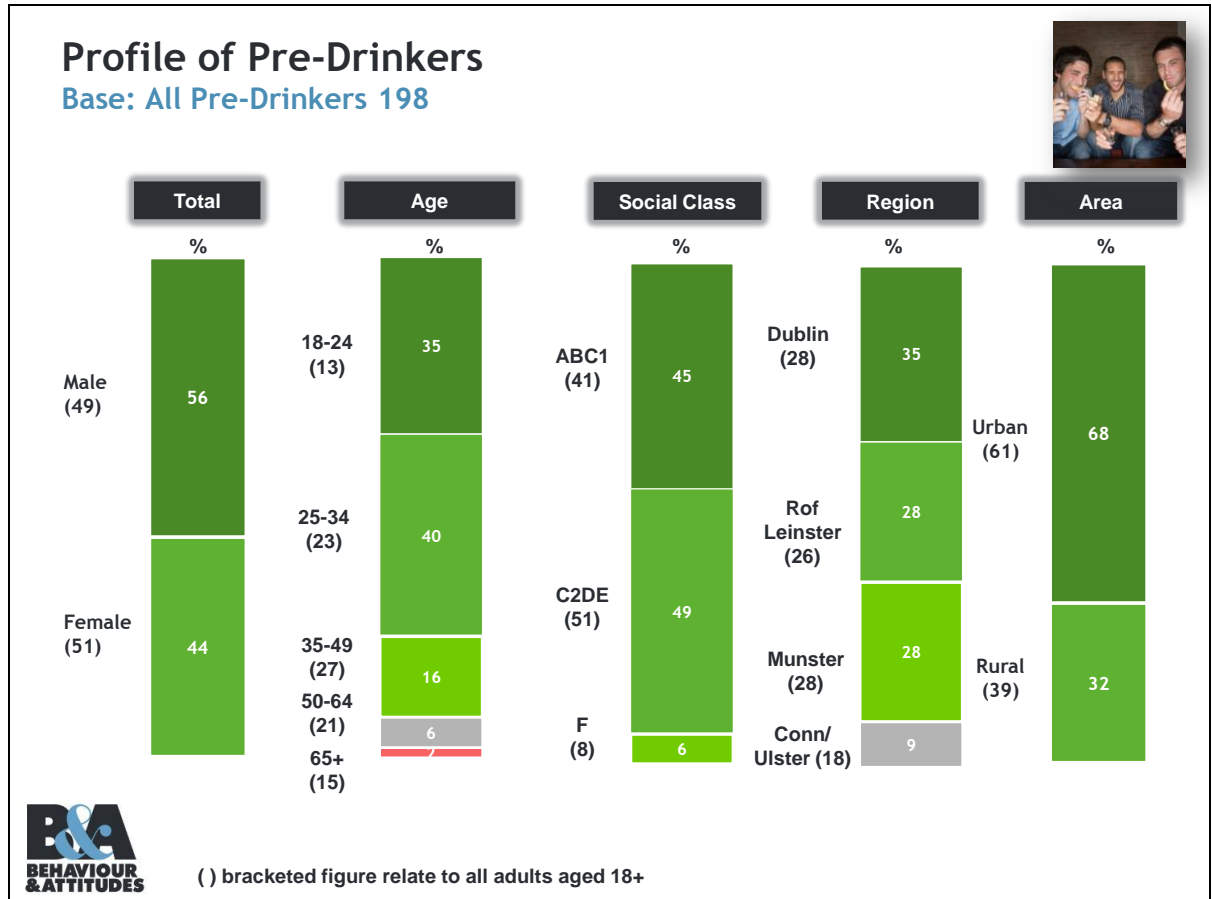
These are very large numbers when we bear in mind that just under a million Irish adults visit a pub weekly or more often nowadays. We can see from the chart earlier that the practice is most pronounced among regular pub goers- those who visit the pub weekly or more often.

Pre-drinking is largely a weekend phenomenon as can be seen here:



6. Who are the Pre-Drinkers?

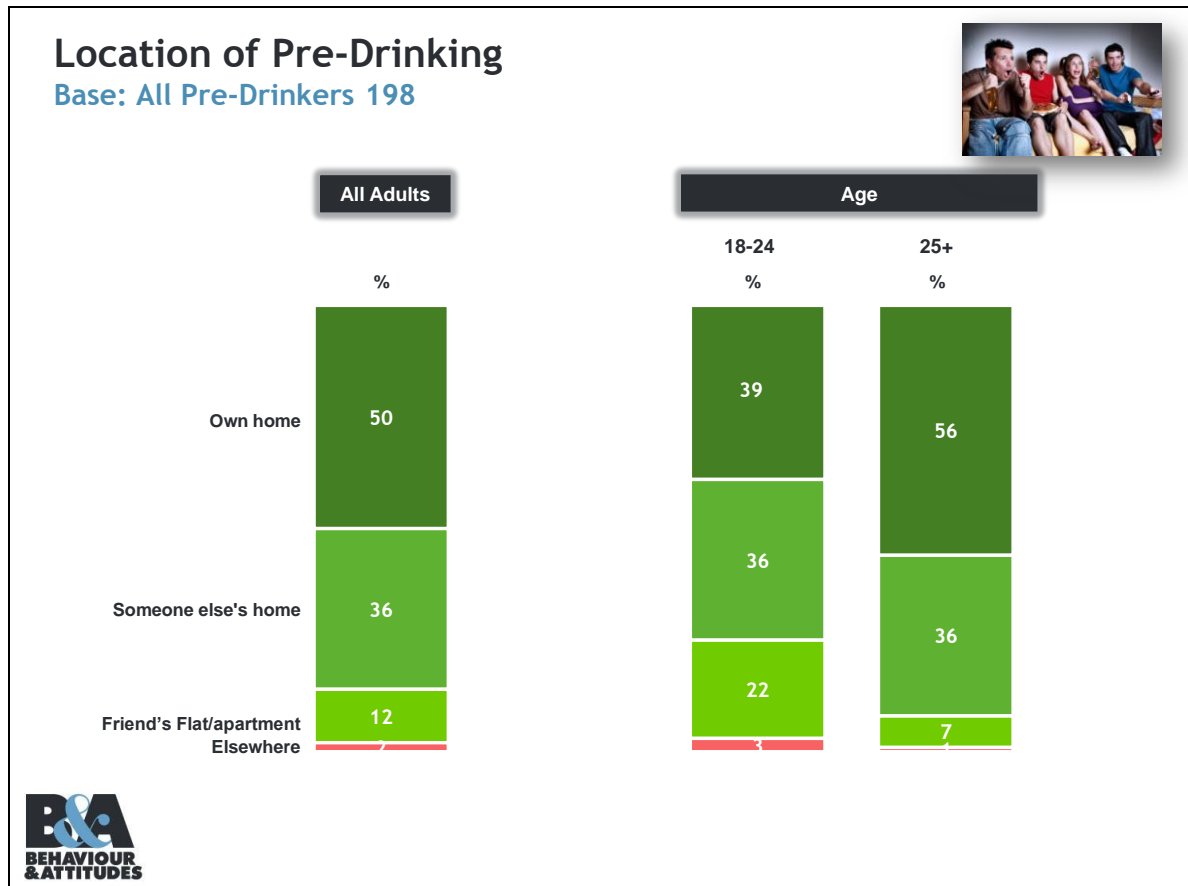
The survey allows us to draw a pen picture of these Pre-Drinkers.



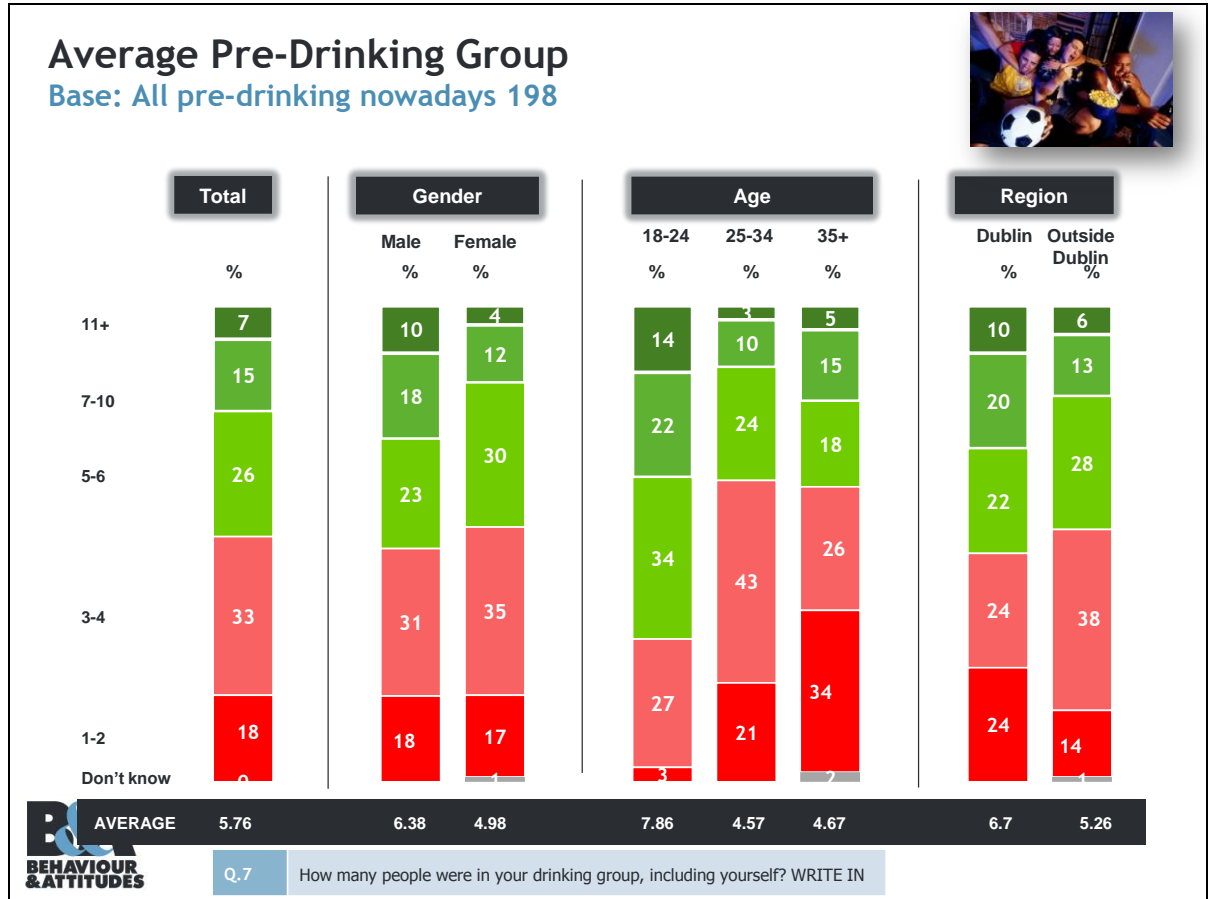
As can be seen from the chart, Pre-Drinkers are likely to be much younger than average, primarily male urbanites and especially Dubliners.

7. Understanding Pre-Drinking

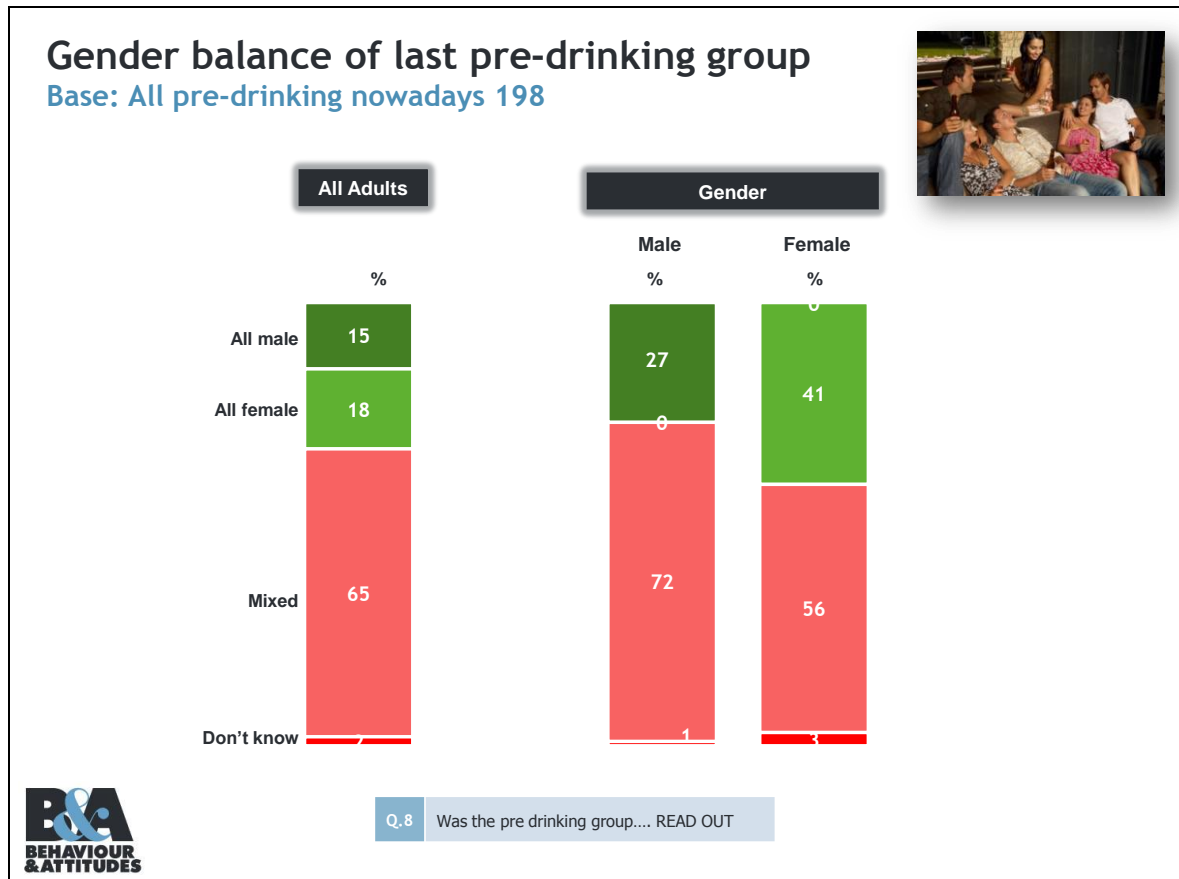
The location for pre drinks varies depending on the age of the drinker. For older people it tends to be in their own home. For under 25's it is more likely to be in someone else's home, flat or apartment.



The average Pre-Drinking group consists of five or six individuals.

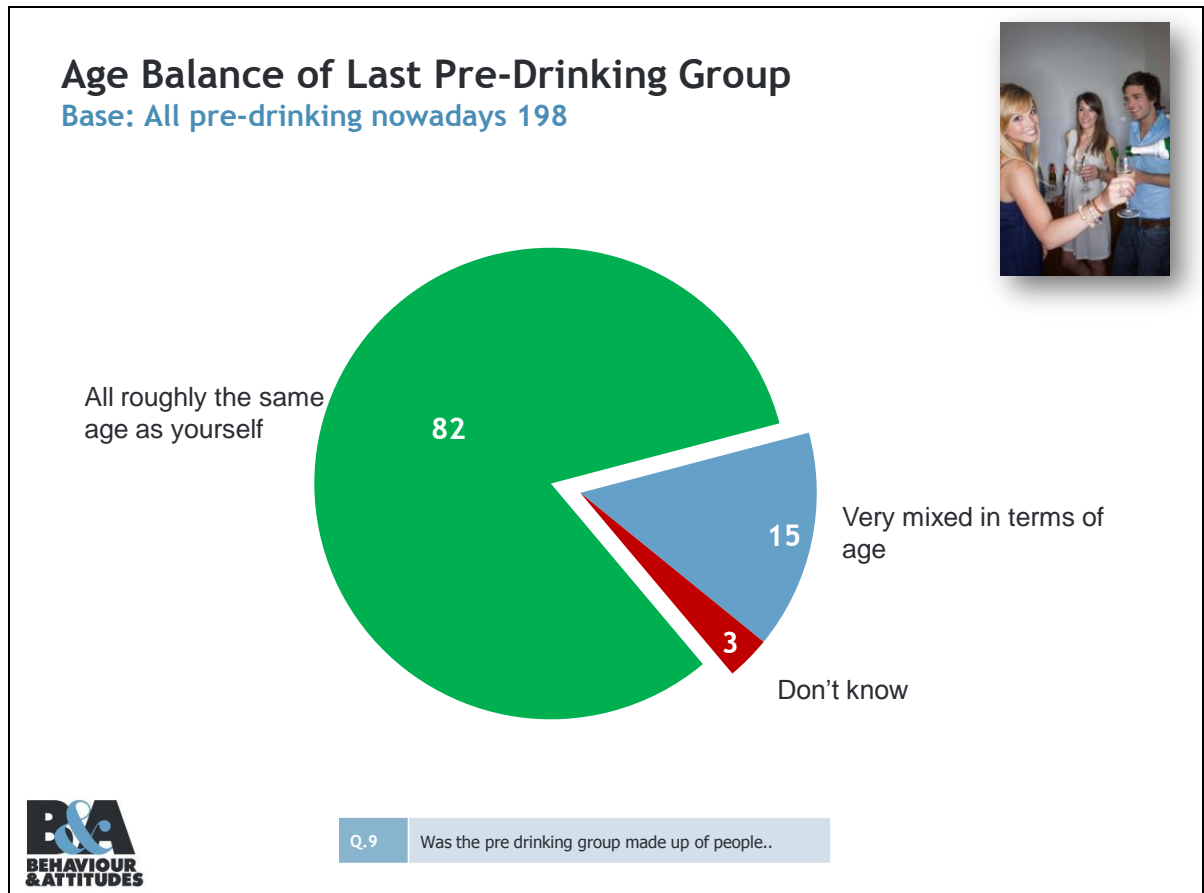


Two thirds of Pre-Drinking groups are mixed gender.



There is an apparent anomaly in male and female reports of mixed gender groups. The most likely explanation is that in many mixed gender groups, males outnumber females.

Pre-Drinking groups tend to be homogenous in age composition.



A wide variety of drinks are consumed on these occasions. Canned/bottled beer/lager is the drink of choice (60%) - driven by males. However wine (26%) and vodka (23%) are also consumed - driven more by females, albeit not exclusively.

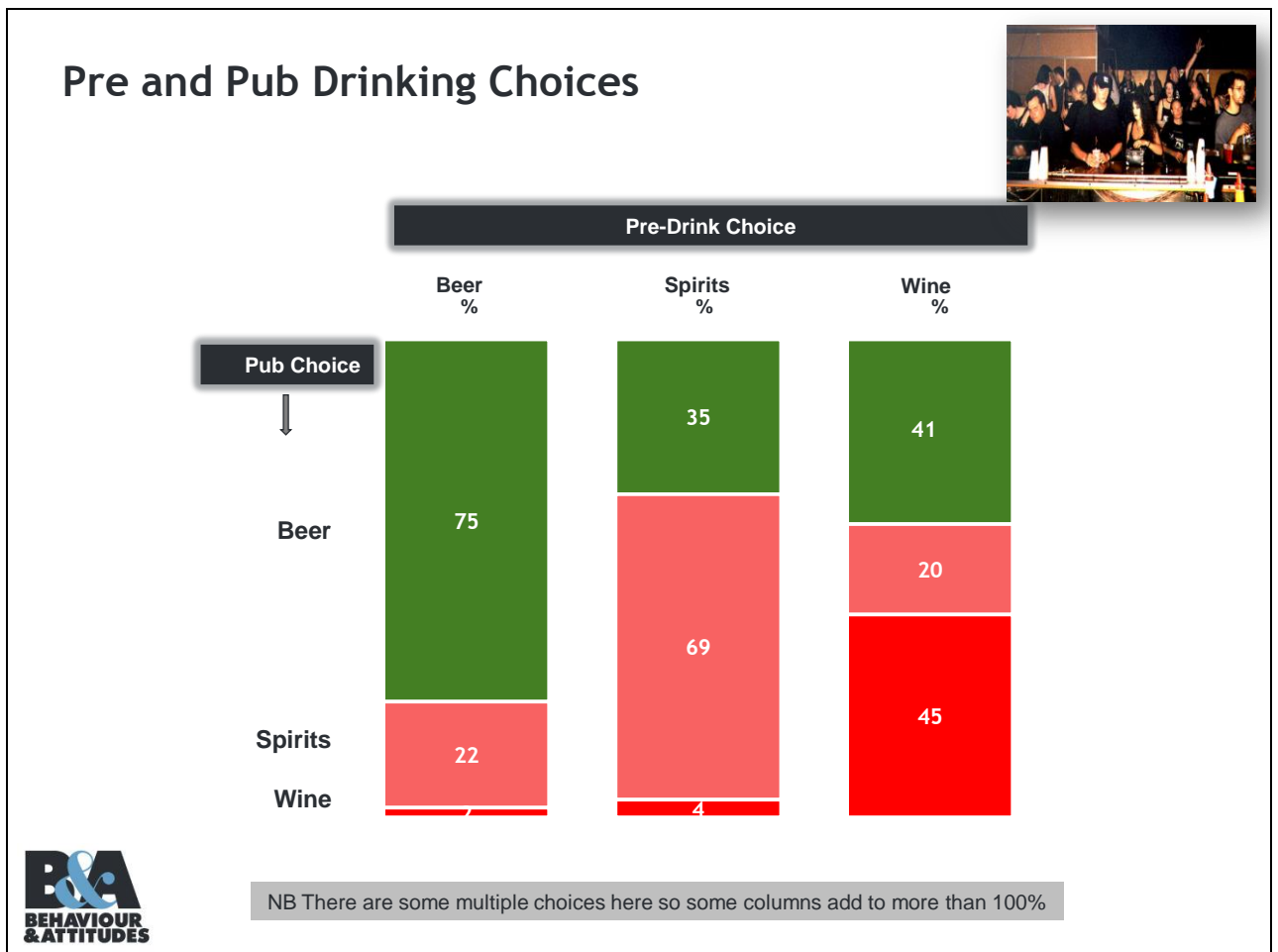
Type of Drink Consumed

Base: All pre-drinking nowadays 198



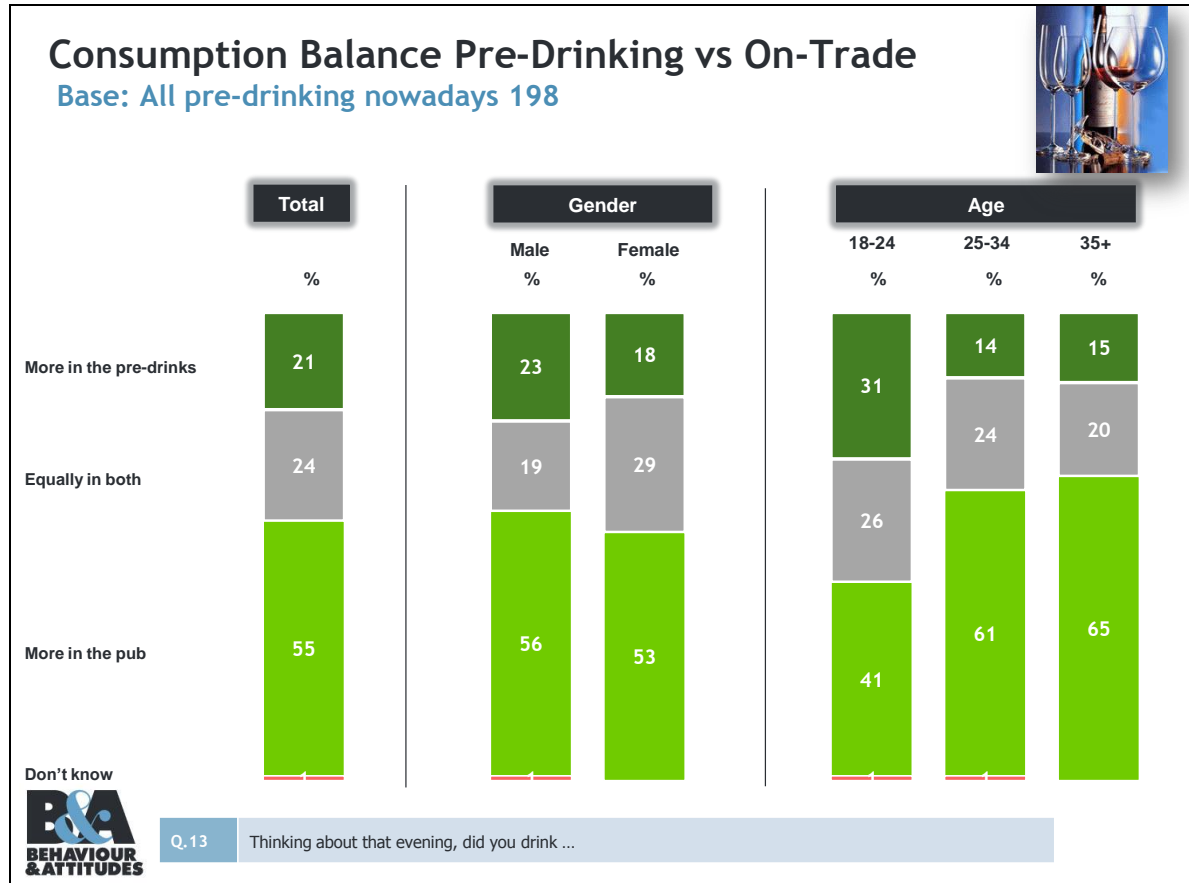
	Total	GENDER		A G E			SOCIAL CLASS	
		Male	Female	18-24	25-34	35+	Abc1	C2DE
Base:	198	108	90	75	78	45	92	93
	%	%	%	%	%	%	%	%
Beer/lager	60	77	38	60	68	48	58	61
Any non-beer/lager	53	39	70	58	45	58	57	50
Only beer/lager	46	61	27	41	53	42	42	49
Any spirits	33	27	40	53	22	31	31	35
Only spirits	20	14	28	32	13	14	17	25
Wine	26	17	38	14	27	42	34	18
Vodka	23	18	29	41	16	8	23	23
Whiskey	5	7	4	5	4	9	5	6
Any other spirits	8	6	11	14	5	4	6	11
Don't know	1	-	3	1	2	-	1	2

The choice of drink before going to the pub strongly influences choice in pub also.

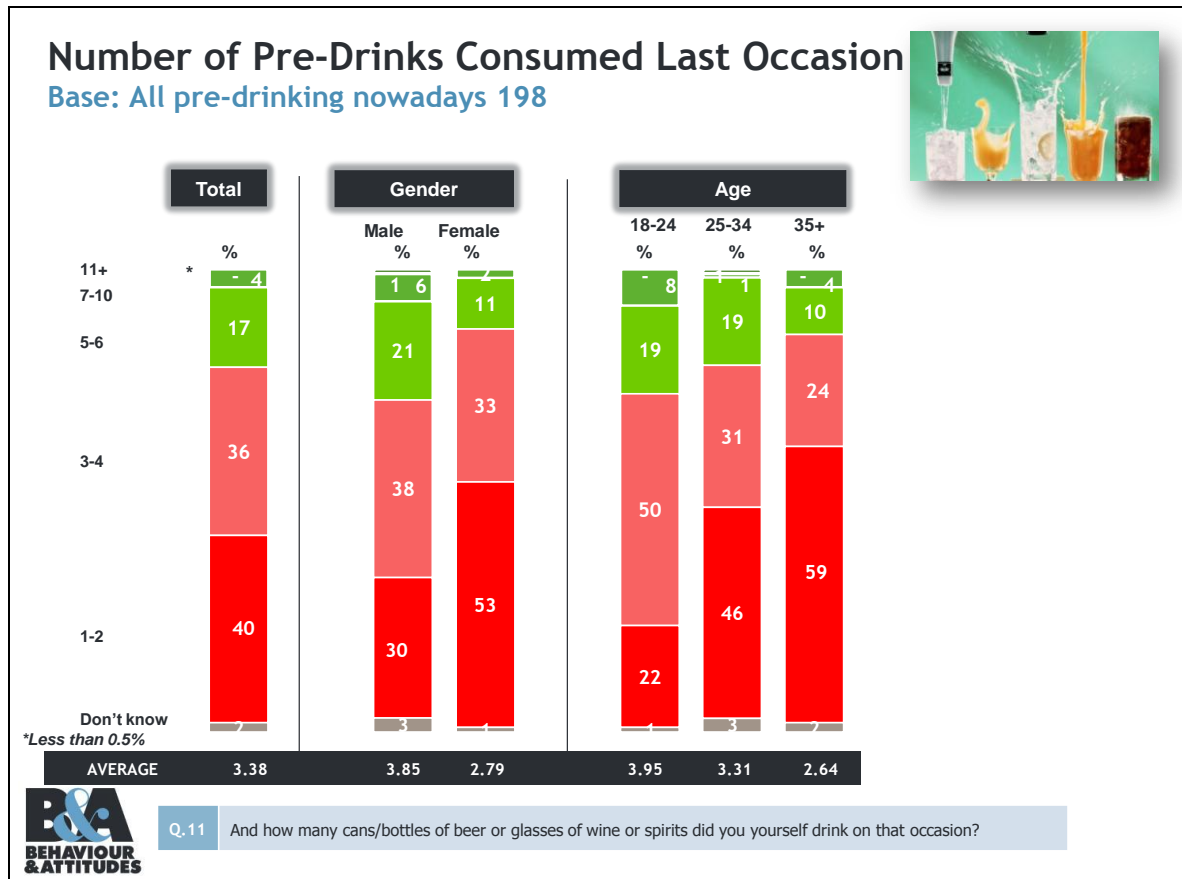


8. Care is needed when driving to the pub

For many Pre drinkers, half or more of their alcohol drinking is done before they leave home.



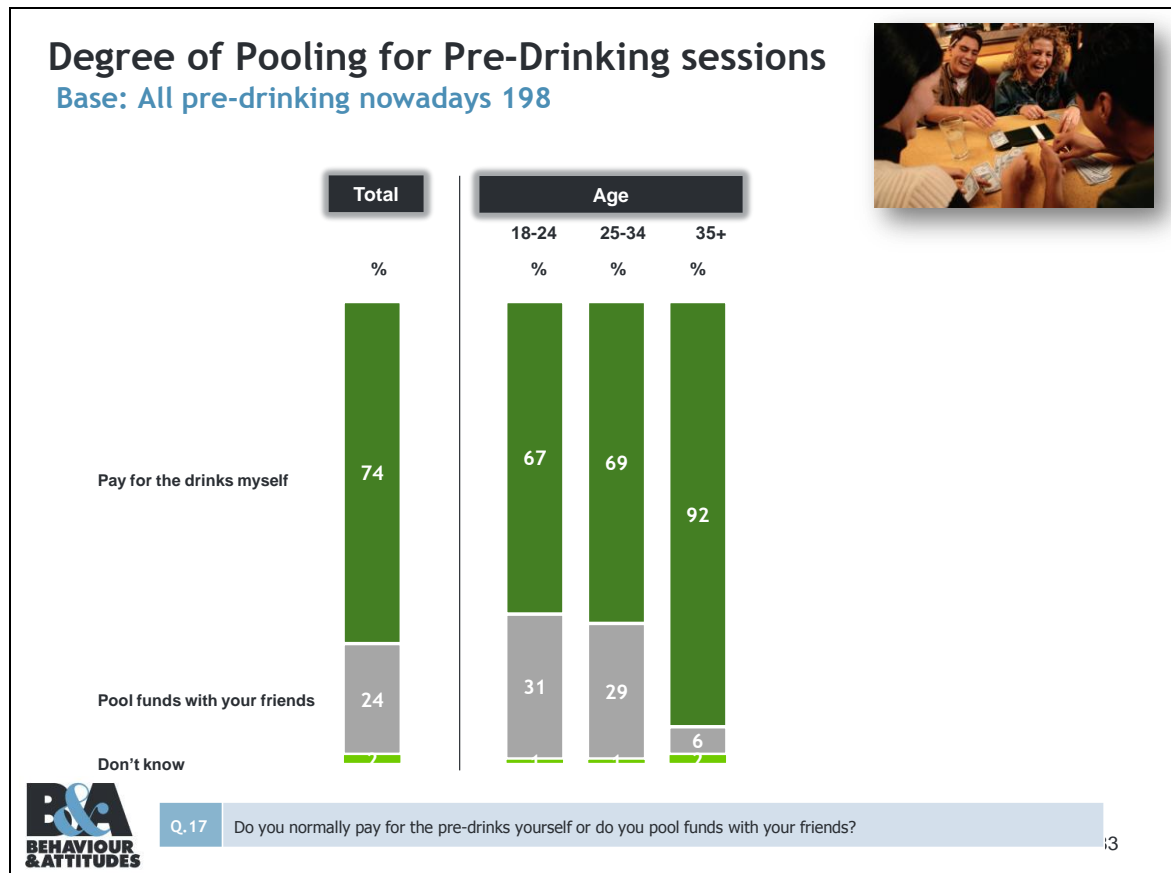
The amounts of alcohol consumed in Pre-Drinking sessions are quite substantial as can be seen here.



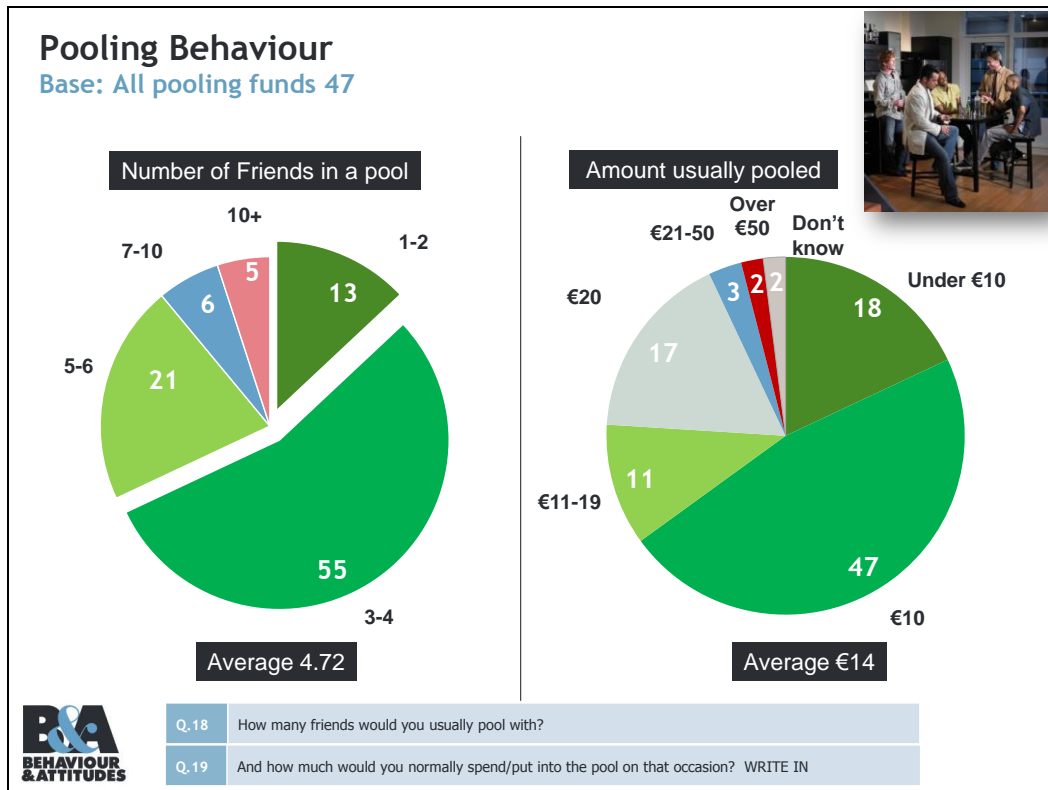
The point we need to note here is that the majority of Pre-Drinkers are over the legal drinks limit on their way to the pub. They may not of course be driving but it is a point that needs to be noted by the authorities as a potential risk.

9. A Lucrative Market

From everything that has been said it is clear that Pre-Drinking is a significant niche market. Most buy their own pre-drinks but there is also considerable pooling of funds, especially among younger people.



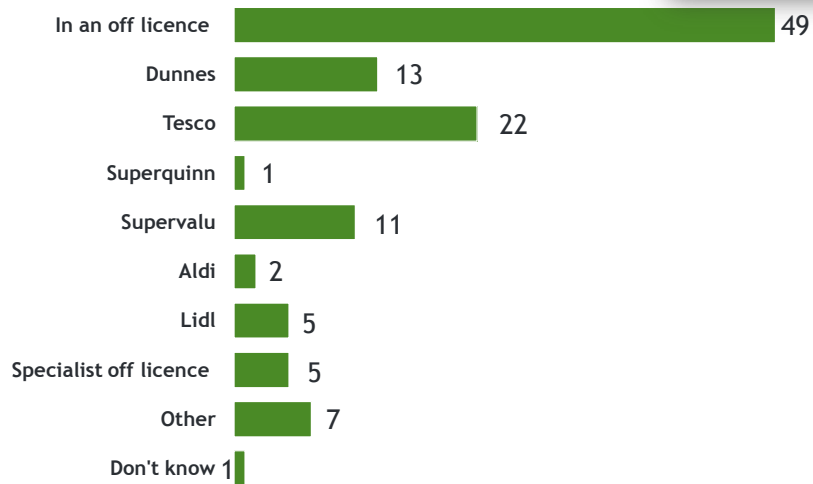
Some of these pools are quite large as is the typical contribution to a pool.



The main beneficiaries of this newly emergent market are specialist off-licenses, but the major Multiples also benefit significantly.

Location of Purchasing Drinks for a Pre-drinking Session

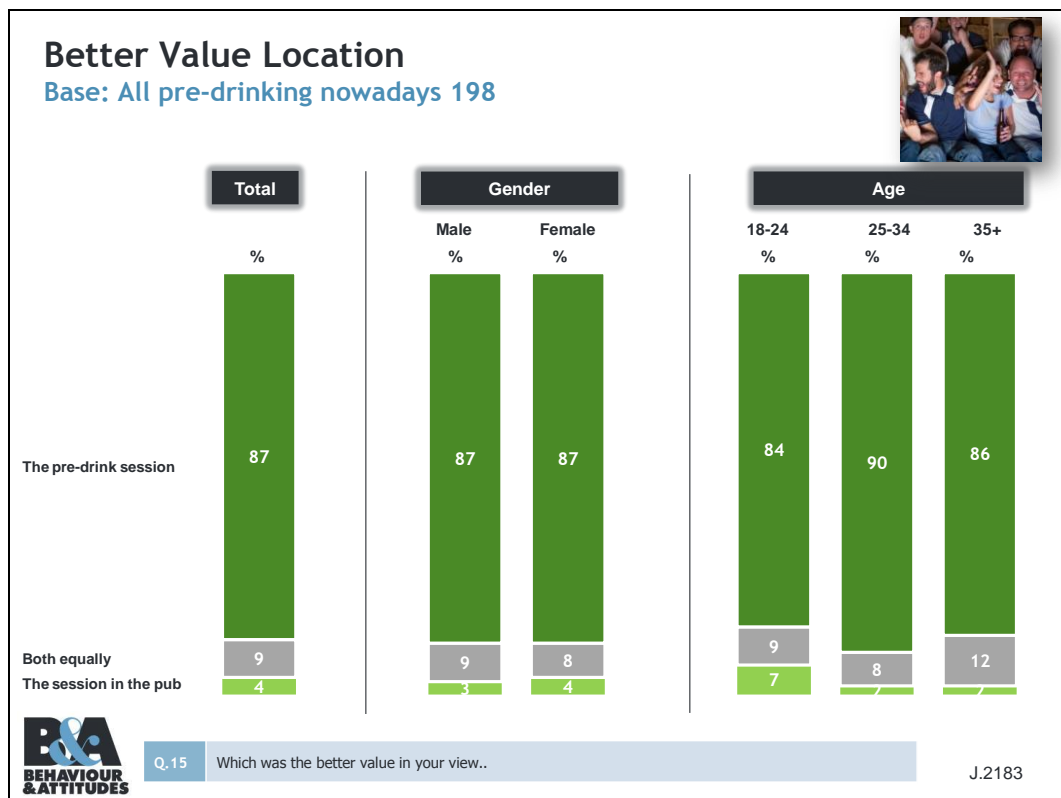
Base: All pre-drinks nowadays 198



10. Looking to the Future

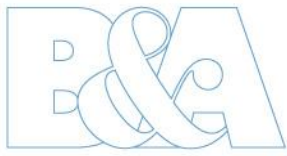
One question which must be considered is whether Pre-Drinking is a short-term fad or a more fundamental change in our drinks culture. To hazard a guess at this we must look separately at proximate and ultimate causes of change.

Price differentials, on and off-trade are, almost certainly the main proximate driver of change. The evidence here is that home drinking wins “hands down” on value for money.

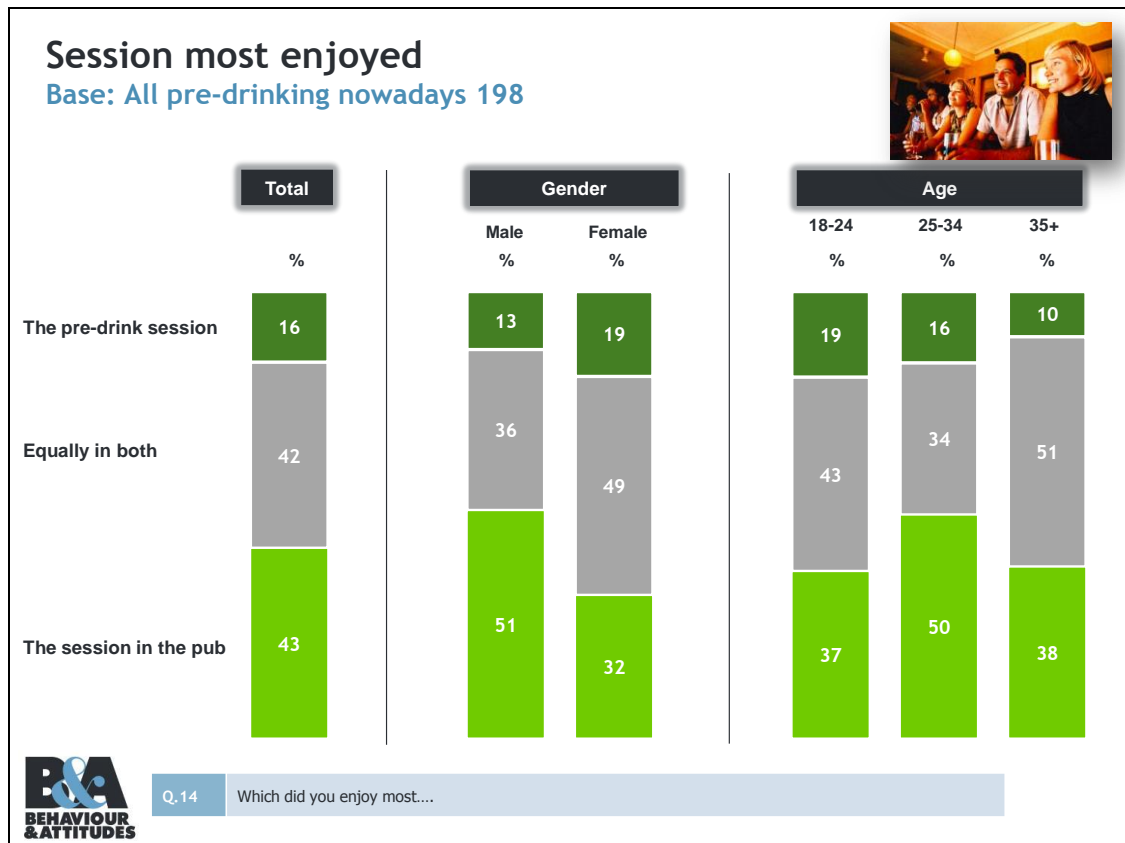


As price differentials and the consumers’ concern about value for money are unlikely to change for some time to come, it seems likely that the Pre-Drinking phenomenon is likely to be with us for some time to come.

Ultimately the consumer verdict will depend on the relative enjoyment people get from the in-home or the in-pub drinking experience.



The evidence on this score is not particularly encouraging from the publican's perspective.



It can be seen that many people claim to get at least as much fun from their Pre-Drinking as from the pub. Inevitably that judgement must be coloured to some degree by price differentials. We can't separate influencing factors quite so neatly as that, but the evidence seems to suggest that Pre-Drinking will be with us for quite some time.