

Economic impact of ban on smoking in public places

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Three years on, there remains little complete evidence on the economic impact of the ban on smoking in public places. This paper summarises what evidence does currently exist for Scotland. The paper then looks at evidence from other countries to seek a longer-term view of what current trends may mean for Scotland.

By the second year of smoke-free legislation sectors of the pub industry which successfully adapted, such as those with increased focus on food sales, performed well. Over the last year the economic downturn has had a considerable impact on all sectors.

1. Scottish evidence

No clear evidence of the impact of the ban has yet been published in Scotland. This report attempts to piece together a story from a variety of sources.

In response to a 2008 Parliamentary Question, Public Health Minister Shona Robison stated: “at present we have no robust evidence to indicate that the Scottish smoking ban has had an adverse effect on sales in Scottish pubs.”¹

Survey evidence on visits to pubs since the ban

Figures from the Office of National Statistics indicate that across the UK 79% of drinkers indicated that the frequency of their visits to pubs were ‘about the same’ after the introduction of smoke-free legislation. Those who indicated that they visited pubs ‘less often than before’ accounted for 11%. The remaining 10% indicated that they visited ‘more often than before’ in the wake of the smoking ban².

Comparable figures were obtained by a YouGov poll commissioned by ASH Scotland in February 2008. 84% of those polled believed that pubs, bars and restaurants are a more pleasant place to be since they went smoke-free. 28% of people said they visit pubs and bars more often now than they did before the ban, 54% said they went ‘as often’ and 16% said they went less often than before the ban³.

Evidence on pub closures

Some pubs have closed over the past three years, and there are highly conflicting published figures for this, set out below.

Closure figures

The Scottish Beer and Pub Association (SBPA) has estimated that around 150 pubs closed in Scotland in 2008⁴. Figures from the SBPA in the first year of the smoking ban indicated that “the number of pub licensed premises in Scotland remained more or less constant ... to the end of 2006”⁵.

A report by the All-Party Parliamentary Beer Group⁶ suggested that closure rates in Scotland were higher than in other parts of the UK⁷. It has been suggested that costly licensing reform, over-regulation and rent levels have contributed to this higher rate of closures⁸.

The British Beer and Pub Association (BBPA) claim that 2,000 pubs closed across the UK in 2008⁹. In 2007 they estimated 1,409 pubs had closed while in 2006 the organisation claimed a mere 216 closed¹⁰. This figure conflicts with accounts of pub closures from other groups.

Prior to the ban the Campaign for Real Ale (CAMRA) announced 1,320 pub closures across the UK in 2006. CAMRA estimated 1,567 pubs closed in 2007¹¹ and a further 1,973 pubs closed in 2008¹².

According to the BBPA the increased rate of closures across the UK ‘is driven by many factors.’¹³ According to the group:

“These include falling beer consumption and changing consumer tastes, shifting demographics, the smoking ban, aggressive supermarket loss-leading and the current economic climate, which is putting a huge strain on household budgets.”¹⁴

Higher costs

The Scottish Beer and Pub Association has blamed tighter new licensing regulations for closures. It claims that after taking account of additional training and other costs the regulations, due to come into force in September 2009, could add an estimated £3,500 to the cost of running a licence.¹⁵

Costs for running a pub increased by 1.3% in 2007 according to the Association of Licensed Multiple Retailers; they estimated costs accounted for 52% of total turnover¹⁶.

The BBPA claim that the beer tax increases in 2008 placed an additional £520 million cost burden on the sector¹⁷.

Prices are rising in the beer industry due a number of factors. The BBPA estimates that utilities costs have nearly doubled compared to three years ago¹⁸. A shortage of malting barley in 2007 increased malting barley prices¹⁹. In addition, the industry has been subjected to increased energy and packaging costs²⁰. These costs are forecast to rise further.²¹ An increase in keg and cask theft and replacement costs is estimated to cost the industry up to £60 million a year.²²

Consumer trends

The increase in closures should be viewed in light of reduced alcohol consumption figures. Recent Scottish evidence pointed to a modest overall reduction in alcohol consumption²³ and the BBPA has stated that alcohol consumption fell by over 3% in 2008²⁴.

The current economic downturn is putting pressure on consumer budgets, from higher inflation and the continuing credit crunch, and adding to problems facing the brewing and pub sector.²⁵

In the first two years after the introduction of smoke-free legislation large chain pubs, particularly those with a focus on food sales, did well. The BBPA stated that “pubs without the room to provide an attractive outside area for smokers, and those that are not heavily focused on food sales, have faced particular difficulties”³.

Increased competition from supermarket loss-leading on alcohol has also been cited as a factor leading to reduced beer sales in pubs.^{26 27} Off-trade figures for 2008 are at a 10-year high.²⁸

Evidence from large national chains

Financial reports from large national pub chains informed us that business held steady in the second year of the smoking ban. The current economic climate has negatively affected a number of businesses in the third year of smoke-free legislation, although others continue to report growth in sales.

Greene King (whose vast holdings include The Belhaven Group plc - one of Scotland's oldest and largest regional breweries with 271 pubs and the brewer of Belhaven Best - the most popular draught ale in the Scottish on-trade) welcomed the smoking ban as an opportunity to draw new customers into the market. In 2008 they stated ‘In the second year of trading following Scotland's smoking ban, the team delivered an outstanding result, with revenue up 8% at £126.1m, operating profit up 18% at £27.5m’²⁹. In 2009 the group reported reduced profit levels and stated that licensee partners in Scotland ‘found the economic conditions challenging’.³⁰ The group also stated that ‘the credit crunch has weakened consumer confidence, deeper discounting in the off-trade has encouraged the consumer to stay at home and higher costs have placed operating margins under severe strain.’³¹

Tragus, one of the UK's largest independent restaurant companies with more than 230 sites, reported like-for-like sales for the Christmas and New Year period for the four weeks to 04 January 2009 for the Group's key brands of Café Rouge, Strada and Bella Italia (174 restaurants) to have fallen by 3.3% ‘in line with the more difficult economic climate’³²

Britain's biggest pubs group, **Punch Taverns** in the 20 weeks to 10 January 2009 reported ‘extremely challenging’ trading conditions. The group's 2008 annual report stated that the majority of licensees had coped well going smoke-free across the UK.³³ The report also indicated that since the ban ‘food has become increasingly important to the success of our pubs’. The interim statement provided by the group in 2008 indicated belief that the medium to long term effects of the smoking ban would be positive.³⁴

Enterprise Inns, Britain's second biggest pub operator reported a fall in profits last year due to 'increasingly difficult economic conditions and turbulent financial markets'.³⁵ The company's 2008 annual report indicated that 'smaller, wet-led outlets have suffered most, with some becoming unviable in the face of the smoking ban and aggressive pricing of alcohol in the off trade.'³⁶ Enterprise chief executive Ted Tuppen warned of tough times ahead in 2008, blaming the first winter smoking ban in England and the decrease in consumer confidence³⁷. He had previously stated that the smoking bans across the UK had contributed to a 13% annual increase in food sales³⁸.

Regent Inns, owners of Walkabout and Jongleurs comedy clubs reported a downturn in like-for-like sales in 2008.³⁹ According to the group:

"the UK is now firmly in the grip of a serious recession which is causing widespread business failures and consequently increased unemployment have resulted in a further downward shift in consumer confidence. This has impacted demand for the Group's products."⁴⁰

Executive chairman Bob Ivell attributed to the drop in profits in 2008 to a slowdown in consumer confidence and impacts of wet weather and the smoking ban⁴¹.

JD Wetherspoon reported an increase in like-for-like sales in the six months up to 25 January 2009.⁴² The company reported a drop in bar sales but a growth in food sales throughout the company in 2008 and stated 'we continue to believe that the smoking bans are to the long term advantage of the trade. Bar sales are likely to recover as customers adjust to the new regime, although the exact timing of this is still uncertain'⁴³.

Mitchells & Butlers, which owns some of Edinburgh's most famous pubs, including Greyfriar's Bobby reported 'resilient like-for-like sales' up 1% in the 9 weeks to 24 January 2009.⁴⁴ In 2008 the company had reported 'trading in our Scottish estate continues to show good growth in the second year of the ban with same outlet like-for-like sales in the first 17 weeks of this financial year up 4.4%'⁴⁵. Mitchells & Butlers previously stated that the smoking ban presented the opportunity to attract customers who had previously avoided pubs. 'Our experience since the bans came into force shows that large pubs, serving high volumes of good food at attractive prices, are already seeing this benefit'⁴⁶.

Evidence from Scottish bingo halls

In the early days of the ban, bingo halls were widely reported as suffering. Limited available evidence seemed to show indications of recovery in the second year of the ban. The current economic climate has negatively affected a number of bingo halls in the third year of smoke-free legislation.

The chief executive of the Bingo Association stated that bingo halls felt the impact of the smoking ban because 'a high percentage of our customers smoke and the revenue generated is mainly from non-bingo activities in the intervals, such as people going to the bar and using the slot machines. Nowadays customers rush outside for a fag at the interval'⁴⁷.

Reports from **Mecca Bingo** (part of the Rank Group) showed an increase in profits in 2007⁴⁸ but a loss in 2008⁴⁹. The organisation stated that 'the impact of the smoking ban, removal of S21 machines [£500 jackpot slot machines known as Section-21 machines], increased casino competition, increase in Casino Duty and general

economic conditions have all had a material negative impact on the Group.’⁵⁰ Rank had previously indicated that in Scotland in 2007 ‘revenue declined by 3% with admissions down 13% and spend per head up 11%’⁵¹. The group also cited the changes to gaming regulations and increased taxation as impediments to progress²².

Gala Bingo (a subsidiary of Gala Coral) reported a reduction in profits in 2007⁵² and in 2008.⁵³ The Group stated that the impacts of smoke-free legislation were ‘the main reason for the year-on-year reduction in Group EBITDA.’⁵⁴ Similar statements were made in 2007⁵⁵.

Where profits have dropped, the smoking ban is not the only factor. The EU Bingo association has also blamed heavy taxation for the drop in profits at UK bingo halls⁵⁶. The rise of online bingo may also be a factor. Other gaming businesses saw an increase in the movement to online betting in 2007⁵⁷.

Other Scottish businesses

Johnson’s Dry Cleaners reported a decrease in profits in 2008, blaming ‘the slowdown in the global economy and the sharp decline of spending in the high street’⁵⁸ In 2007 the company reported that ‘the current decline in retail spending and the smoking ban are having some impact on the trading volumes’⁵⁹. In a 2007 statement by the chief executive the group reported ‘We are not talking about anything very dramatic. We have noticed in that particular part of the business there are some signs of things tightening, which is probably a combination of general pressures on the high street and the smoking ban, which seems to have reduced the number of times people have things cleaned’⁶⁰.

2. International evidence

Evidence from other countries seems to suggest that a smoking ban can have a short-term negative impact on the hospitality trade. However profits tend to return to normal within two years, and in some cases, the ban can have a positive impact on the trade. We are yet to see whether a similar pattern will emerge in Scotland, and it may be hard to disentangle the impact of the smoking ban from the wider impact of the current recession.

Restaurants and cafes

In **New Zealand** smoke free legislation came into effect on 10th December 2004. Research showed a ‘strong and consistent growth in revenue’⁶¹ for accommodation, cafes and restaurants, with an 11.7% increase in revenue one year after the smoking ban. Research was conducted by the New Zealand Ministry of Health using statistics from the New Zealand Retail Trade Survey. Further research by the same organisation conducted two years after the smoking ban showed a continued rise in patronage and sales in cafes and restaurants⁶².

In **South Africa** research conducted using tax receipts for the four years following the introduction of smoke-free legislation demonstrated ‘a positive, albeit not a significant, impact on revenues’(p.129)⁶³.

In **Italy** (p.346) research showed ‘smoke-free legislation did not seem to unfavourably affect the business of restaurants or cafes’⁶⁴ one year post-ban.

Tasmania passed smoke-free legislation in 1997. Research carried out in 2004 (p.454) stated that 'the smoke-free law had no impact on ratio of monthly turnover for restaurants and café's to total monthly retail turnover in Tasmania'⁶⁵.

Gaming

In a seven year study of gaming activities, such as bingo, in Kentucky Pyles and Hahn found that 'smoke-free municipal laws have no significant effect on revenues'(p.62)⁶⁶.

Alcohol sales, public houses, bars and clubs

Research commissioned in **England** by the Department of Health looking at the impact of the first year of the smoke-free law found that 38% of licensed premises reported a positive impact on the company⁶⁷. In addition it is estimated that the total number of licensed premises has increased by 5% since the introduction of smoke-free legislation⁶⁸

In **Northern Ireland** a report studying the impacts of the first year of smoke-free legislation showed an increase in employment in hotels and restaurants of 3.6% and 0.5%, respectively, while bars experienced a 7.0% decline.⁶⁹ The report states that 'while it is possible the smoking legislation has had an impact on bar trade and hence employment, employment in bars has been on the decline since the start of 2006.'⁷⁰

US research carried out by Alamar and Glantz looked at the economic impact of local smoking bans on individual bars⁷¹. They used a business valuation database to determine sale price of bars between 1993 and 2005. Their 2007 report (p.1401) found that 'the presence of a smoke-free law had no detectable effect on the sale price of a bar'.

Although alcohol sales in **New Zealand** initially showed a displacement from bars and clubs to home sales, this effect was not sustained³⁰. A fall of 6% in bar retail sales in the first quarter of 2006 was noted with a corresponding 6% increase in off trade figures. This decrease in bar sales was not sustained throughout 2005, more sales than expected from the long term trend were generated³⁰. The tobacco and hospitality industry had suggested that the outcome of the legislation would be a 20-30% downturn in sales²⁹. A downward trend in retail sales was noted in the two years post-ban by the New Zealand Ministry of Health but this was in line with pre-existing trends³⁰.

Smoke-free legislation came into effect in **Ireland** on 29th March 2004. The Vintners' Federation of Ireland (VFI) claimed in 2005 that "turnover in pubs is down up to 20-30%"⁷² one year after the smoking ban. These figures were in line with declines in sales claimed by tobacco industry affiliates and subsequently disproved through published tax receipts in Canada and the United States⁷³. It was stated by the VFI that rural pubs were especially affected by the ban, although they acknowledged that changes in lifestyle and high alcohol taxes also affected sales.

One year after the legislation came in in Ireland, the Irish Central Statistics Office reported a 5.3% decline in bar trade (not the 20-30% decline announced by the VFI⁷⁴). This reduction was in line with the 4% decline in the previous three years.

In 2006 the Irish Central Statistical Office reported that volume of bar retail sales had risen again for the first time since the ban³⁶. Additional research in 2006 found that the 'number of customers in 38 Dublin public houses had increased by 11% since the ban'⁷⁵.

Hospitality industry

Research undertaken by Scollo and Lal in 2008⁷⁶ gives a comprehensive review of economic impacts of smoke-free legislation on the hospitality industry. They found that 'no negative economic impact from the introduction of smoke-free policies in restaurant and bars is indicated by 47 of the 49 studies where findings are based on an objective measure' (23, p.3).

Research carried out by the **New Zealand** Government one year after the smoking ban demonstrated a neutral to positive economic return in the main hospitality venues after the legislation came into effect²⁹.

In **California** the smoking ban was introduced for restaurants in 1995 and bars and casinos in 1998. Annual revenues for bars and restaurants between 1991 and 2003 were analysed and demonstrated that revenues increased following the smoking bans⁷⁷.

This pattern was borne out by evidence from **Norway** where businesses in the pub, bar and restaurant sector had fewer closures in 2004, the year the ban was introduced than in the previous year⁷⁸. The Norwegian hospitality sector reported a 5% increase in revenue after the smoking ban was introduced in 2004⁷⁹. An additional increase in employment figures and turnover was noted throughout all hospitality sectors, including the bar industry in Norway in 2006⁸⁰.

3. Conclusion

It is not yet possible to draw clear conclusions on the impact of the ban in Scotland. International evidence points to the possibility of a short-term dip in profits, generally followed by a long-term neutral to positive effect.

The Scottish Government will assess the economic outcomes of the smoke-free legislation in Scotland in 2009. The study will use objective measures of impact provided by the Inter-departmental Business Register to examine hospitality industry profits, business openings and closures (Haw,S. 2008. personal communication, 18 March). A publication date for this study has not yet been announced.

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³ ASH Scotland. *Press release - Two years on, Scots support smoke-free public places but believe more needs to be done, 26th March 2008*. [online], 2008. Available from: <http://www.ashscotland.org.uk/ash/3755.html> [accessed 26/03/08]

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¹⁰ British Beer and Pub Association. *News: pub closures accelerate towards 30 a week 05.03.08*. [online] 2008. Available from: http://www.beerandpub.com/newsList_detail.aspx?newsId=235 [accessed 11/03/08]

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¹³ British Beer and Pub Association. *A Wake up For Westminster: Economic trends in the beer and pub sector* [online] London: British Beer and Pub Association, 2008. Available from:

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