

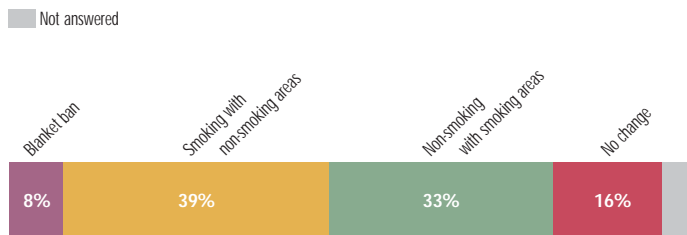
LICENSED VICTUALLERS WALES

SMOKING OUT THE TRUTH

**A SURVEY OF OPINION
OF PUB LICENSEES
ON A SMOKING BAN IN WALES**

23 May 2005

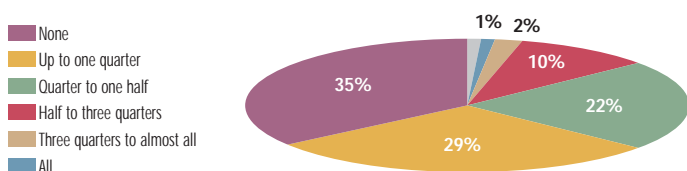
SMOKING OUT THE TRUTH



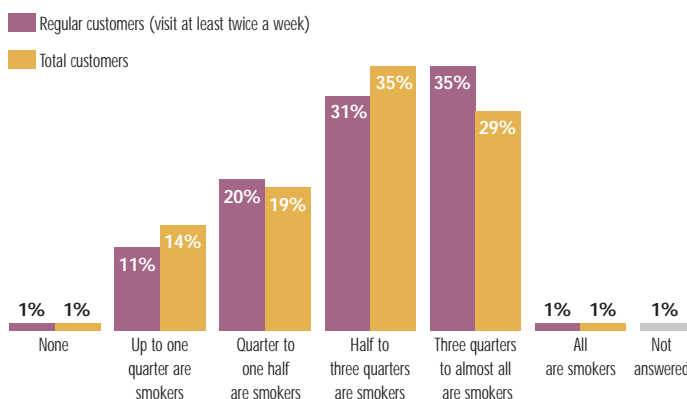
Which one of the following options do you most support?



How many rooms do you have in your pub?



How much of your turnover comes from food sales?



What proportion of your customers are smokers?

Introduction

The National Assembly is considering introducing an outright ban on smoking in Wales' pubs. In April 2005 Licensed Victuallers Wales the national body that represents the interests of individual licensees surveyed its members to see what they felt.

285 responses were received from pubs across the country. The results are summarized on these two pages.

Pub operators are keen to accommodate non-smokers better

80% of pub operators want improvements to be made to accommodate staff and non-smokers better – but they are strongly opposed to the outright ban as discussed by the Assembly. Only 8% want a full ban with 72% proposing that the outlets should be split into smoking and non-smoking areas or rooms.

The industry has retained its traditional structures

83% of Welsh pubs have more than one room, making separation of smokers and non-smokers relatively simple and effective. Although food has become more important in recent years 35% of pubs serve no food at all and a further 29% rely on it for less than a quarter of their turnover.

The importance of smokers to the industry

In this relatively traditional community market customers who choose to smoke are a very important part of the business. 68% of licensees believe that over half of their 'regular' customers (who visit at least twice a week) are smokers – 37% of them believe that three quarters or more of their regulars smoke. Although there are slightly more non-smokers among the general pub-goers – only 33% estimate that this proportion is less than half.

The impact of a smoking ban on jobs

48% of licensees thought that the ban would lead them to lay off staff and a further 29% believed that they would close altogether. Not a single licensee thought that a ban would encourage them to hire more staff.

These impacts would be the result of a major drop in customer numbers and a steep business decline with 90% believing that both would drop and none (including those that favour a ban) believing that they would increase.

The impact of a smoking ban on the local community

There was considerable concern that a ban would lead to problems in the local community with smokers forced outside or into the street. This was seen as a major problem as over 41% did not have an outside area that could be used as an area for smokers.

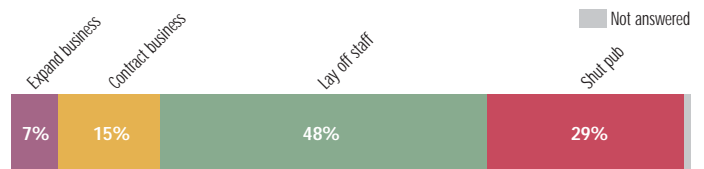
66% thought that a smoking ban would lead to more noise disturbance for neighbours and 84% that it would lead to increased drinking in the home.

Alternatives to a ban

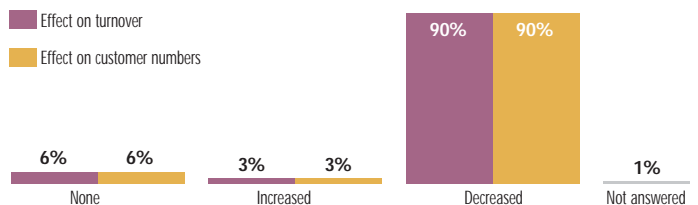
79% of licensees said that they would be prepared to take action to change the way in which they operated if it would help them to avoid a damaging ban.

The most popular option would be to ban smoking at the bar counter in the smallest premises and to allow smoking (in multi-room premises) in at least one room. If this were adopted all pubs would have at least one, and most several, non-smoking rooms except for the very smallest where this would be impractical and for whom special provision would have to be made.

The next most popular option was to improve the level of ventilation in the premises at an average cost of up to £3000.



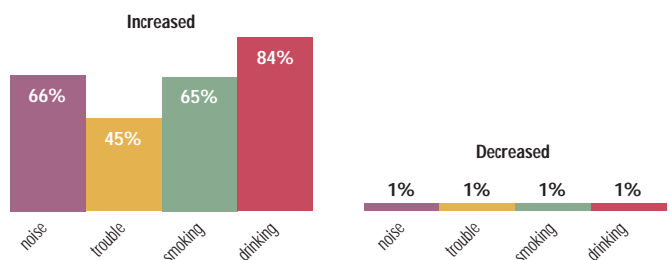
If there were a blanket ban do you believe that you would:



What would you estimate to be the effect of a blanket ban on turnover and customer numbers?



Do you own an outside area in which your customers could smoke in the event of a blanket ban?



Would a ban lead to increased or decreased noise, trouble, smoking and drinking in your local community?



Would you take one of the following actions if there were an alternative to a ban?

- Spend £3000 on ventilation/air quality equipment,
- Ban smoking at the bar in all venues, and in one room of the pub in multi-room venues,
- Stop selling food

THE LICENSED VICTUALLERS WALES POSITION

We believe that a complete smoking ban in Welsh pubs would be disastrous for our industry and jobs and deeply damaging to the communities that our members serve.

We believe that exposure to tobacco smoke should be limited wherever possible and especially around those who serve in our members' pubs and bars.

As this survey shows we have widescale support for our proposal that smoking should be banned at the bar counter in all premises and in at least one room of all multi-room premises. This would ensure that 80% of pubs had at least one room that was totally smoke-free for customers, and that staff exposure to tobacco smoke was limited dramatically.

This sensible proposal, which recognises the unique character of Welsh pubs, would help our industry to save thousands of jobs whilst providing a greatly improved environment for all and helping the Assembly to meet its public health objectives.