



# Leisure Market Activity & Value Shifts

## Barometer Research

Prepared by Larry Ryan

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# Introduction

- A review of leisure spending patterns in and out of home, undertaken on the Behaviour & Attitudes national face-to-face Barometer survey.
  - ❖ Directly comparable with previous surveys in 1995, 2002, 2004 and 2008.
- Fieldwork in November 2009 interviewing a representative quota sample, face-to-face, in their own homes.
  - ❖ Sample size of 1000 aged 18+, quota-matched with the census and corresponding to an adult population of 3,284,000.
- Further information on this survey, and about Behaviour & Attitudes other services, is available from any of our executive team on +353 1 2057500



david@banda.ie



graham@banda.ie



martha@banda.ie



john@banda.ie



ian@banda.ie



des@banda.ie



luke@banda.ie



larry@banda.ie



neil@banda.ie



ian.goulding@banda.ie



elaine@banda.ie



phelim@banda.ie



greg@banda.ie

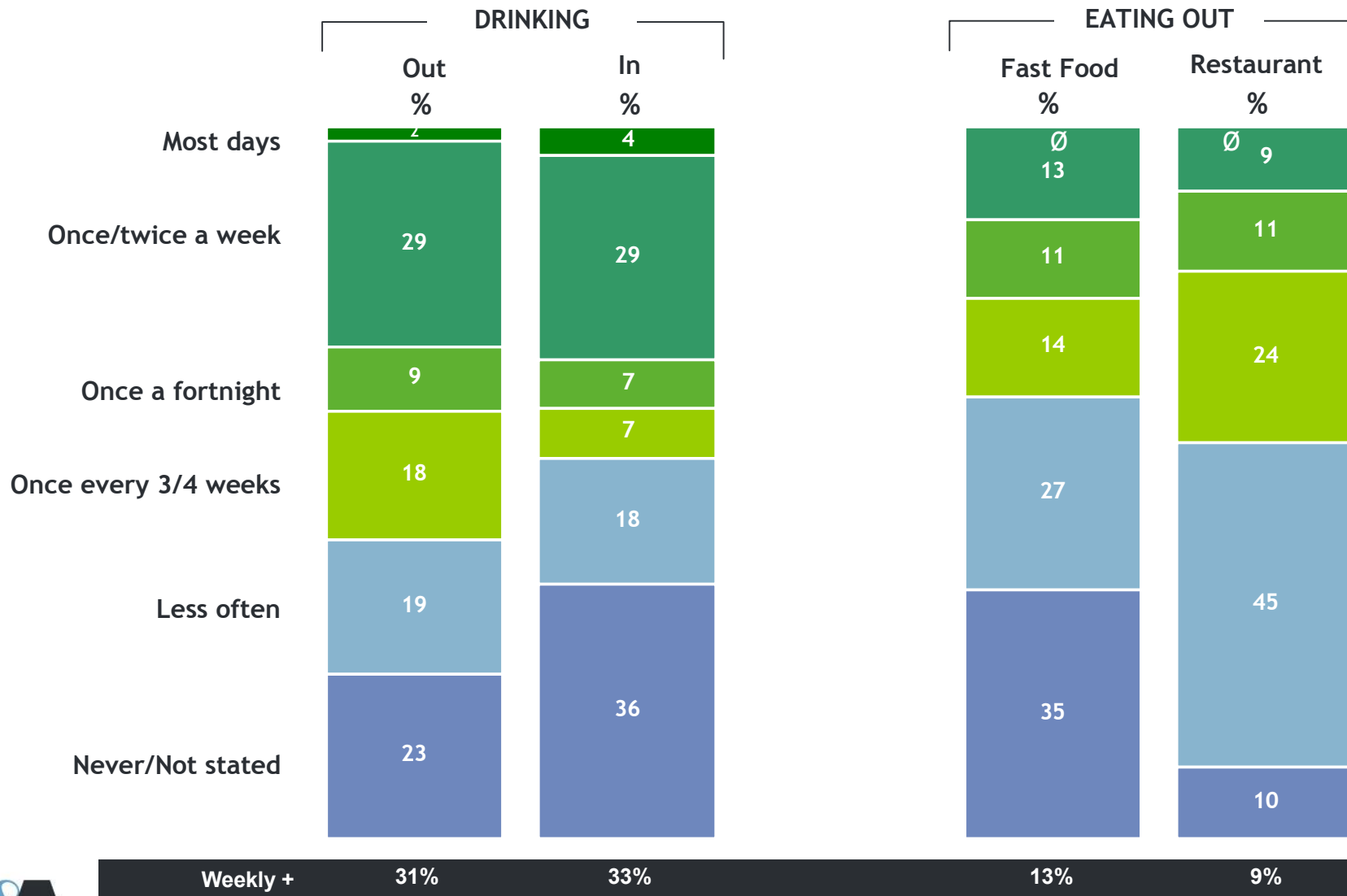
# Summary

- Significant year-on-year shifts are apparent. In 2008 eating out in formal restaurants was the No. 1 activity and had been creeping up since 2004, to replace drinking in pubs as the favourite national pastime of the late Celtic Tiger year.
- Drinking at home has now become the No.1 activity (just bypassing eating out). It accounts for €1.2 billion of spend (up 26% year on year), and it is important to reiterate that the cost of alcohol at home has dropped even though total spend has been rising.
- Drinking out of home is marginally weaker, with a 5% spend drop to 2.1 billion.
- Fast food use more or less static in terms of participant numbers although sector income is up by a quarter overall. Formal restaurants seem decimated: 29% visited in past fortnight in 2008, 20% in past fortnight this year. Revenue to sector drop by 33%.
- 25-49 year olds make up 50% of all leisure usage but only 40% of spend; heavily impacted by the recession. The leisure market is becoming very dependent on younger (under 25) and grey market spenders.

# Eating & Drinking Incidences



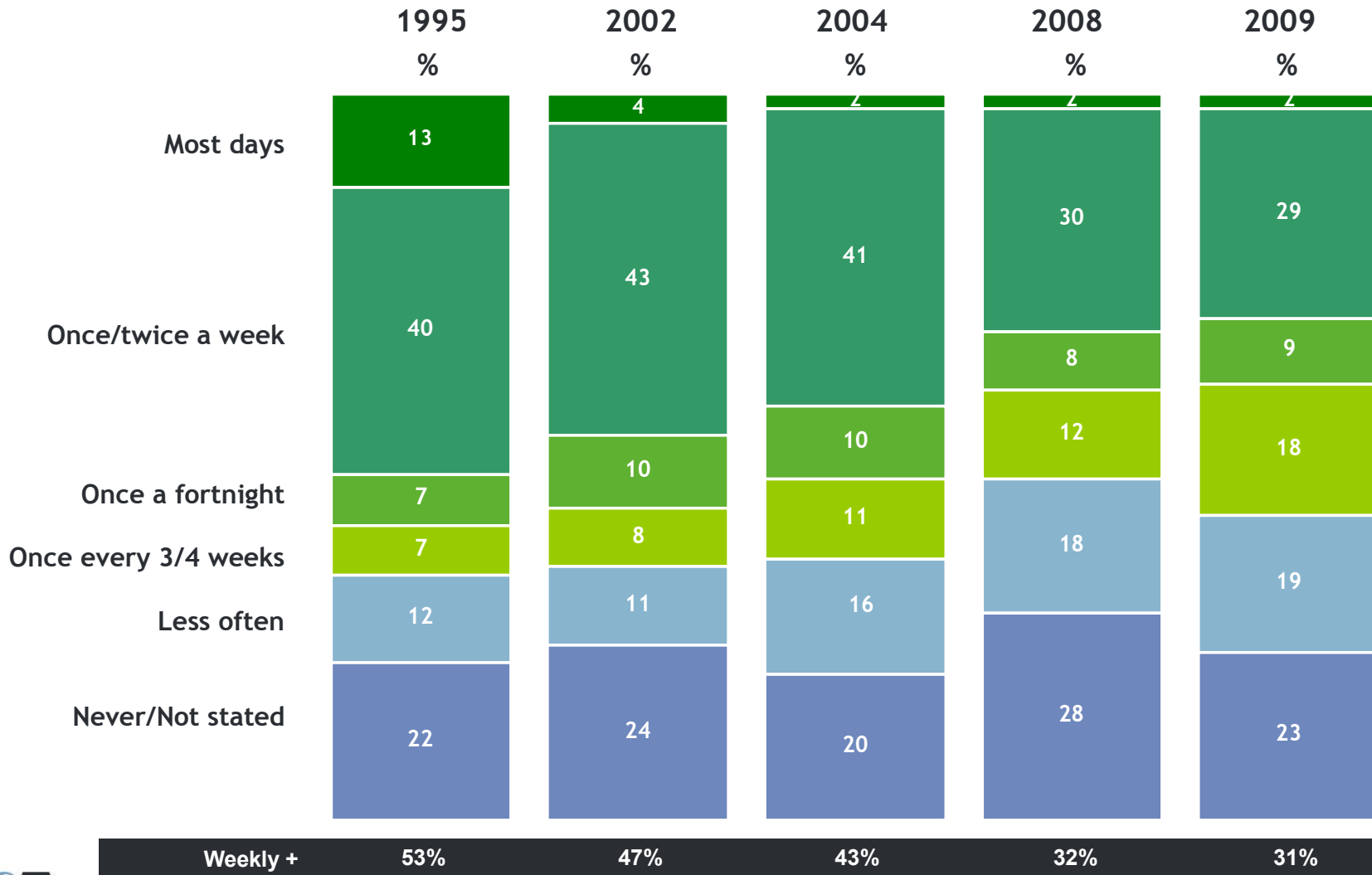
# Eating & Drinking Out 2009



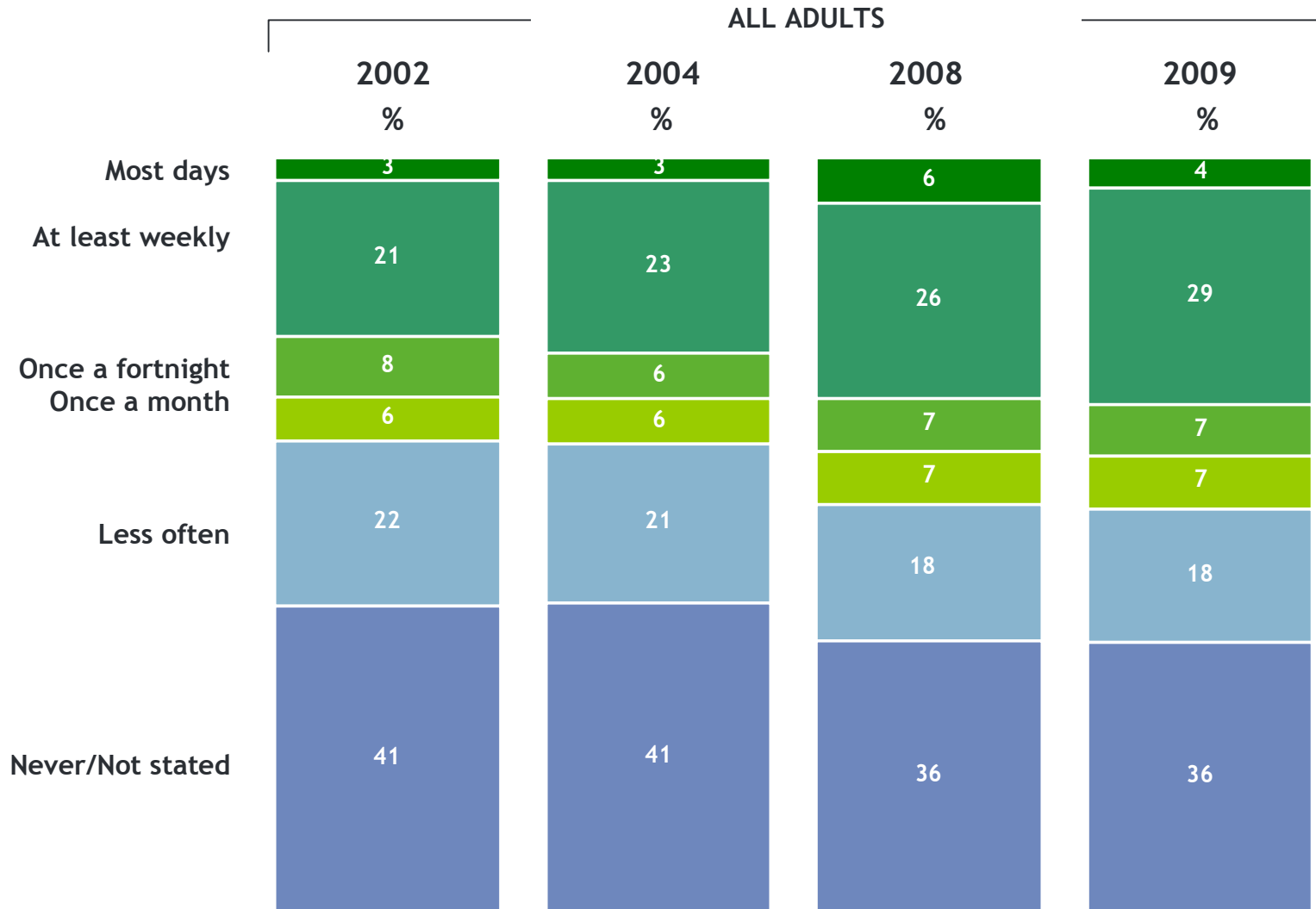
There are three times as many drinking in or out of home weekly than there are eating out

# Frequency of Drinking Out

## 1995 - 2009



# Frequency of Drinking at Home 2009

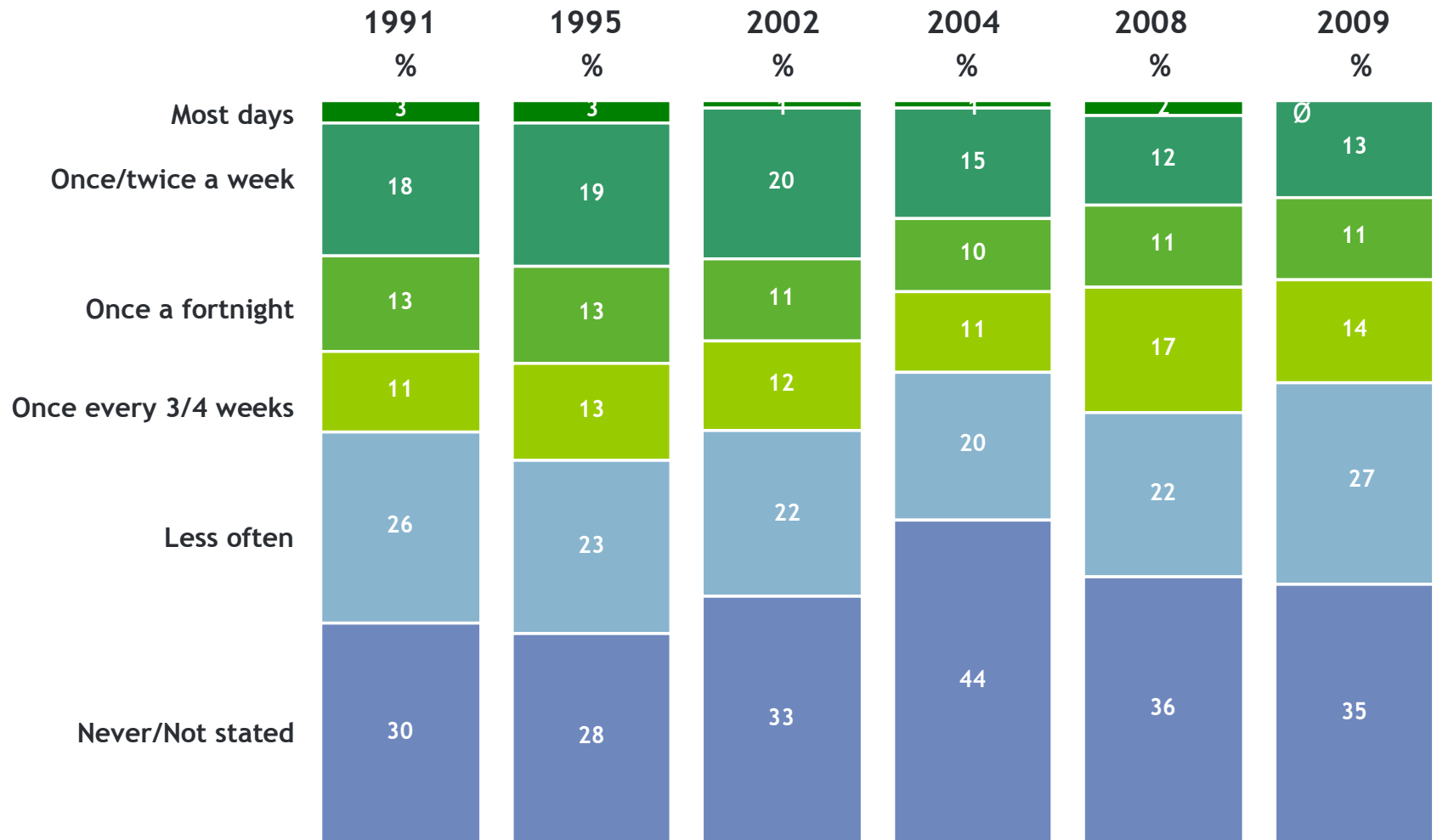


Weekly +                      24%                      26%                      32%                      33%

33% drink at home weekly plus ... a rate of increase since 2002 of about 5% per annum.

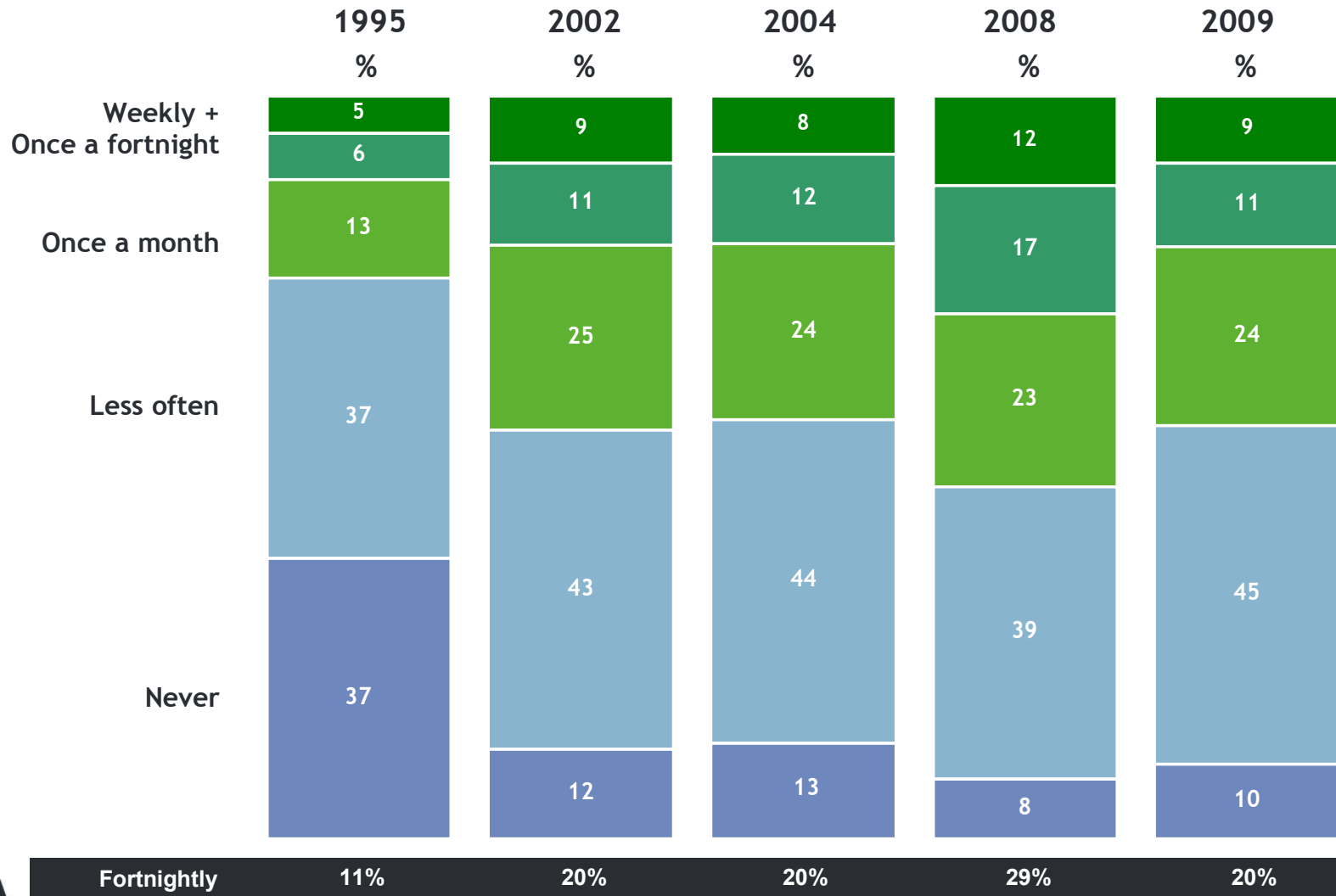
# Frequency of Fast Food Restaurant Use

## 1991 - 2009



Frequent fast food use is tailing off

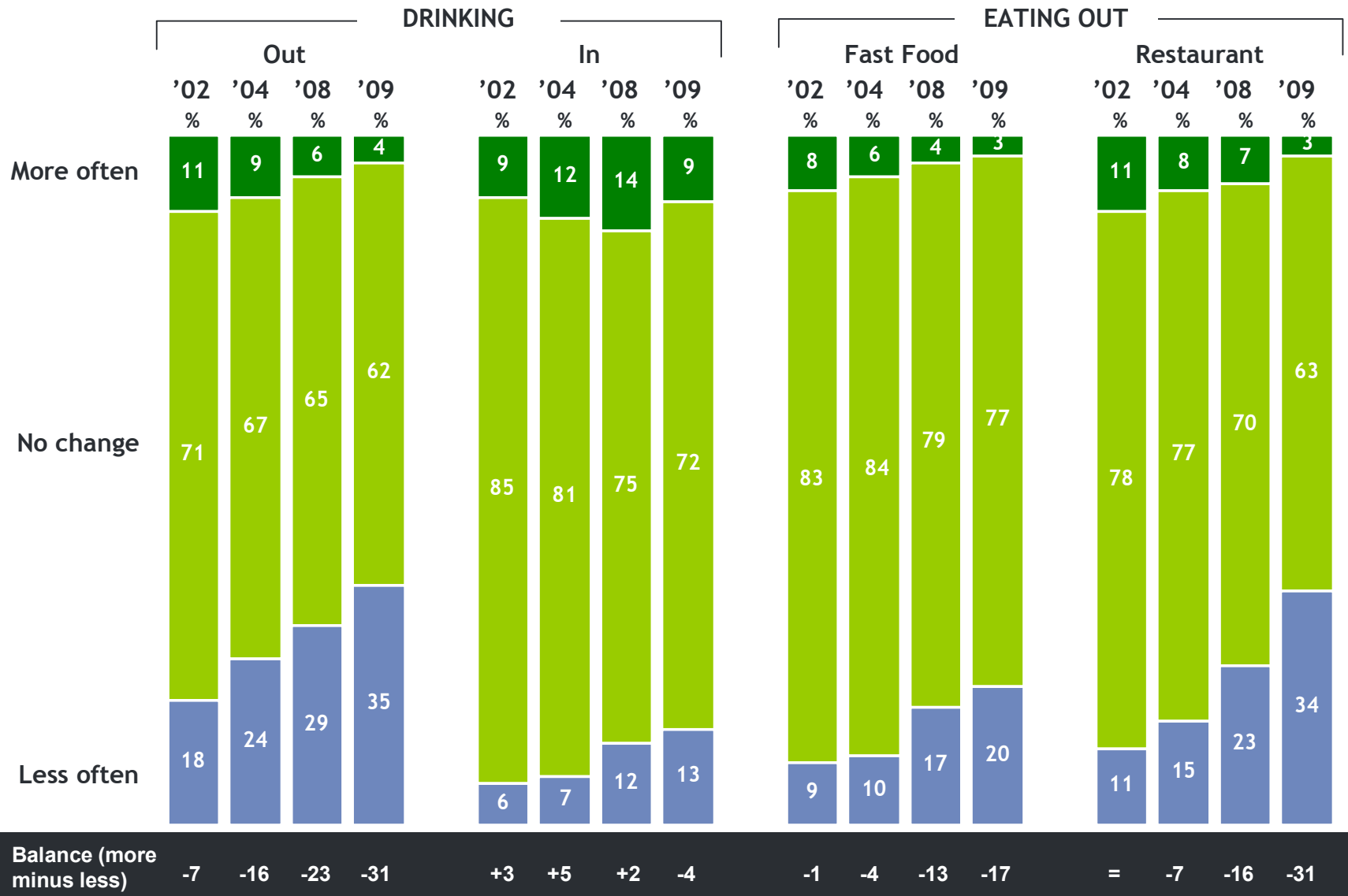
# Frequency of Visiting Formal Food Restaurants 1995 - 2009



Fortnightly use has plummeted in the past year, from 3 in 10 to 2 in 10 (and back to 2002/2004 levels)

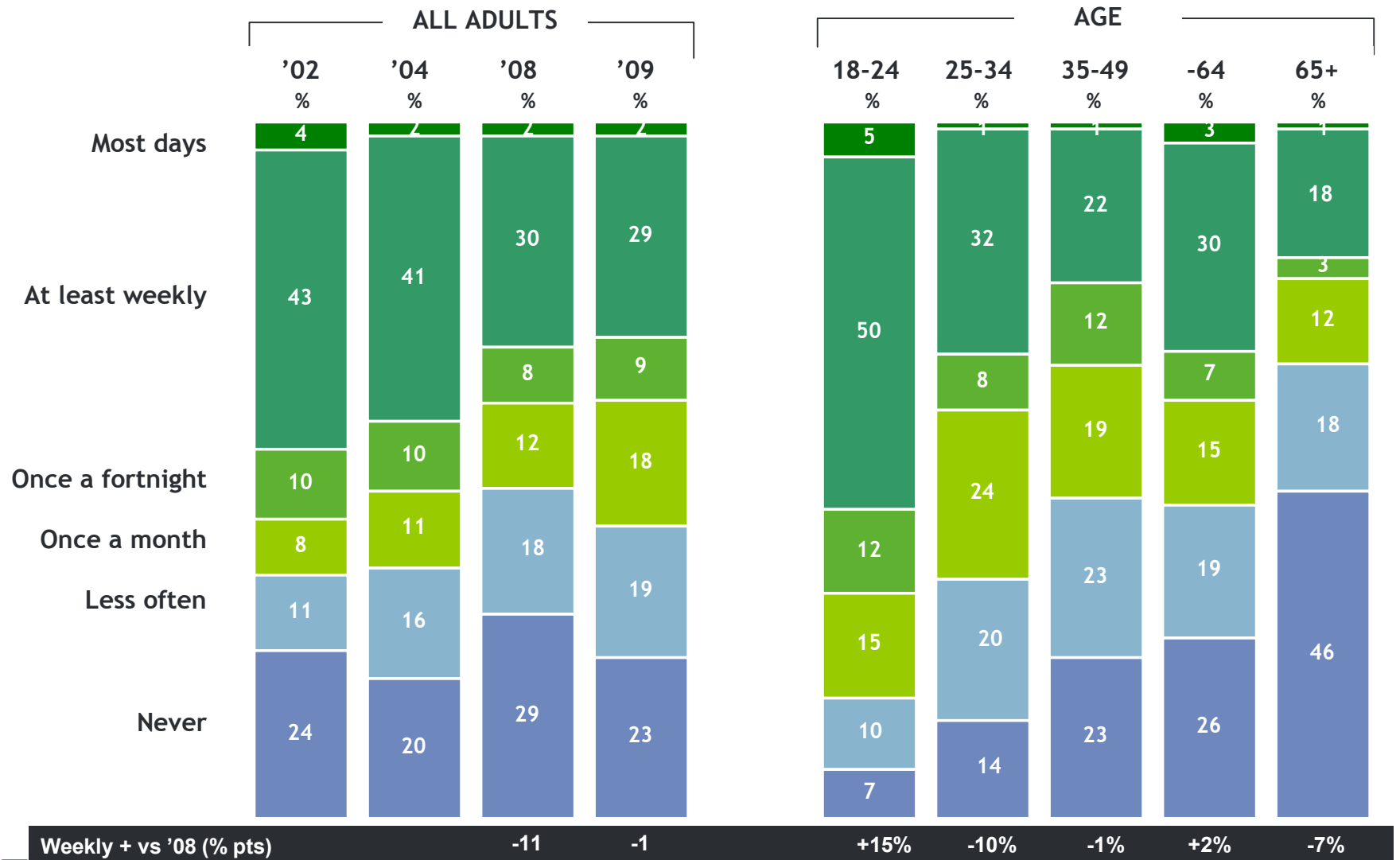
# Relative Shifts in Eating/Drinking Patterns

Comparisons 2002 - 2009



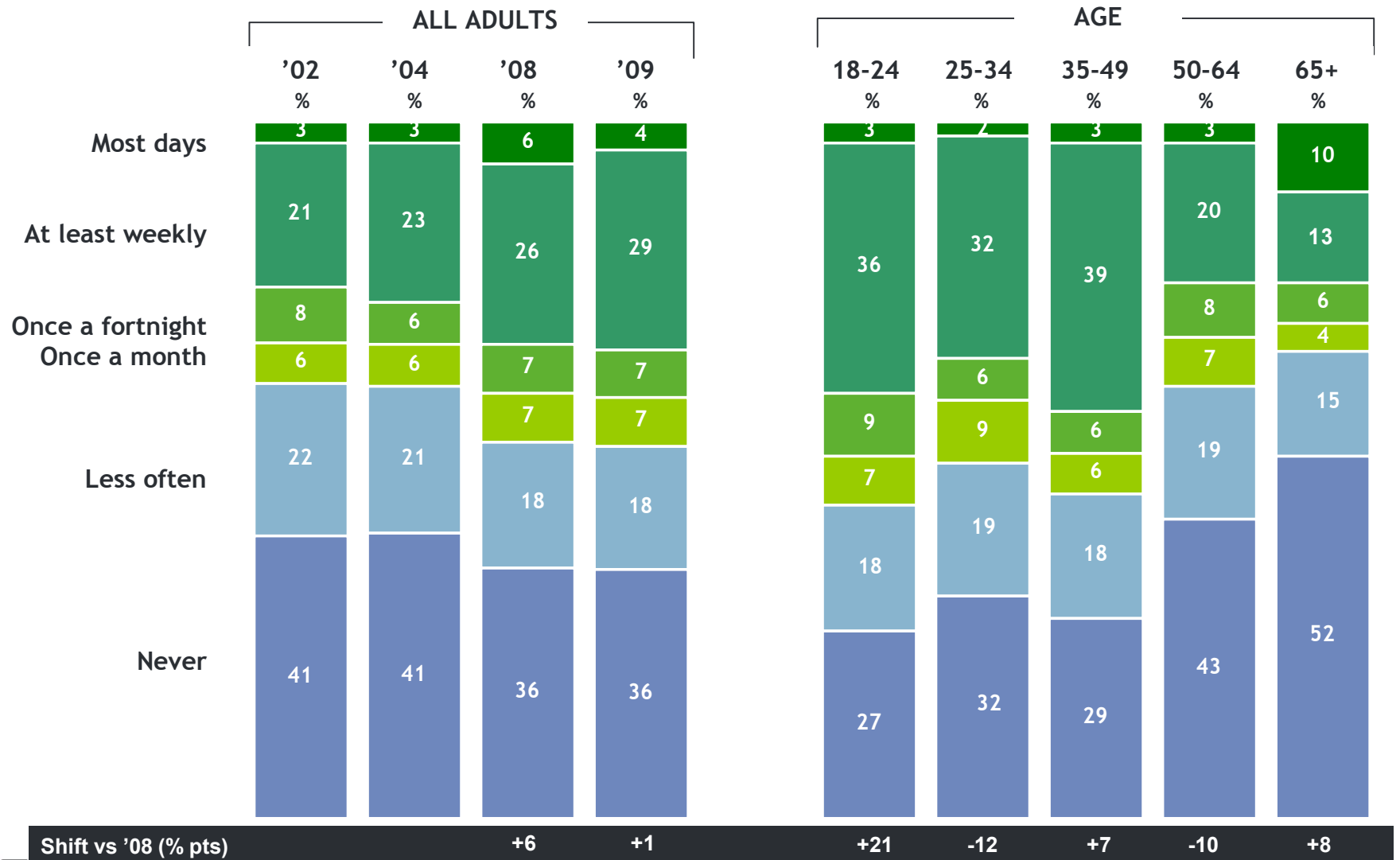
# Frequency of Going Out for a Drink x Age

## 2002 - 2009



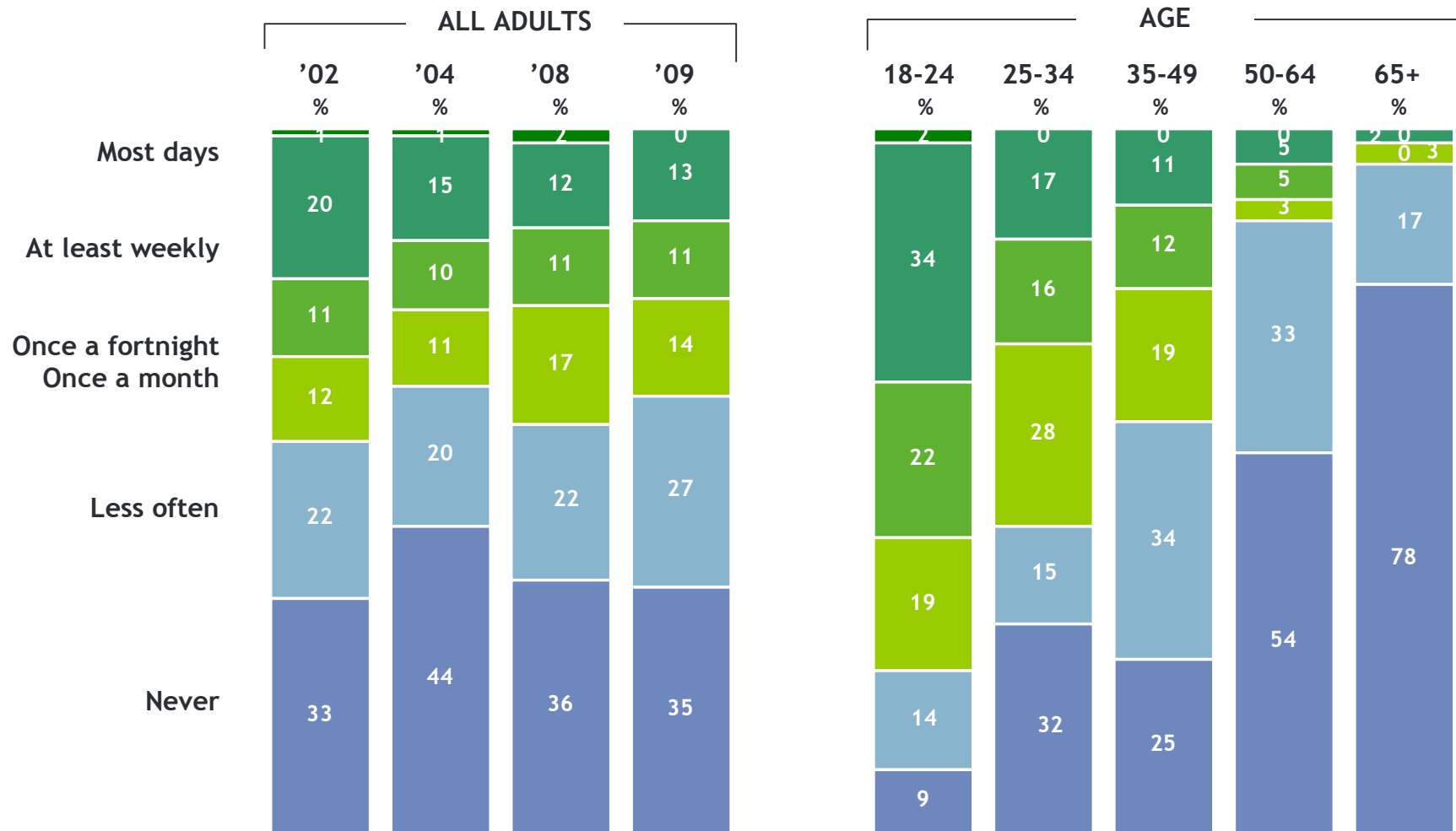
# Frequency of Drinking at Home x Age

## 2002 - 2009



# Frequency of Visiting Fast Food Restaurants x Age

## 2002 - 2009



Shift vs '08 (% pts)

-2

-1

+10

-10

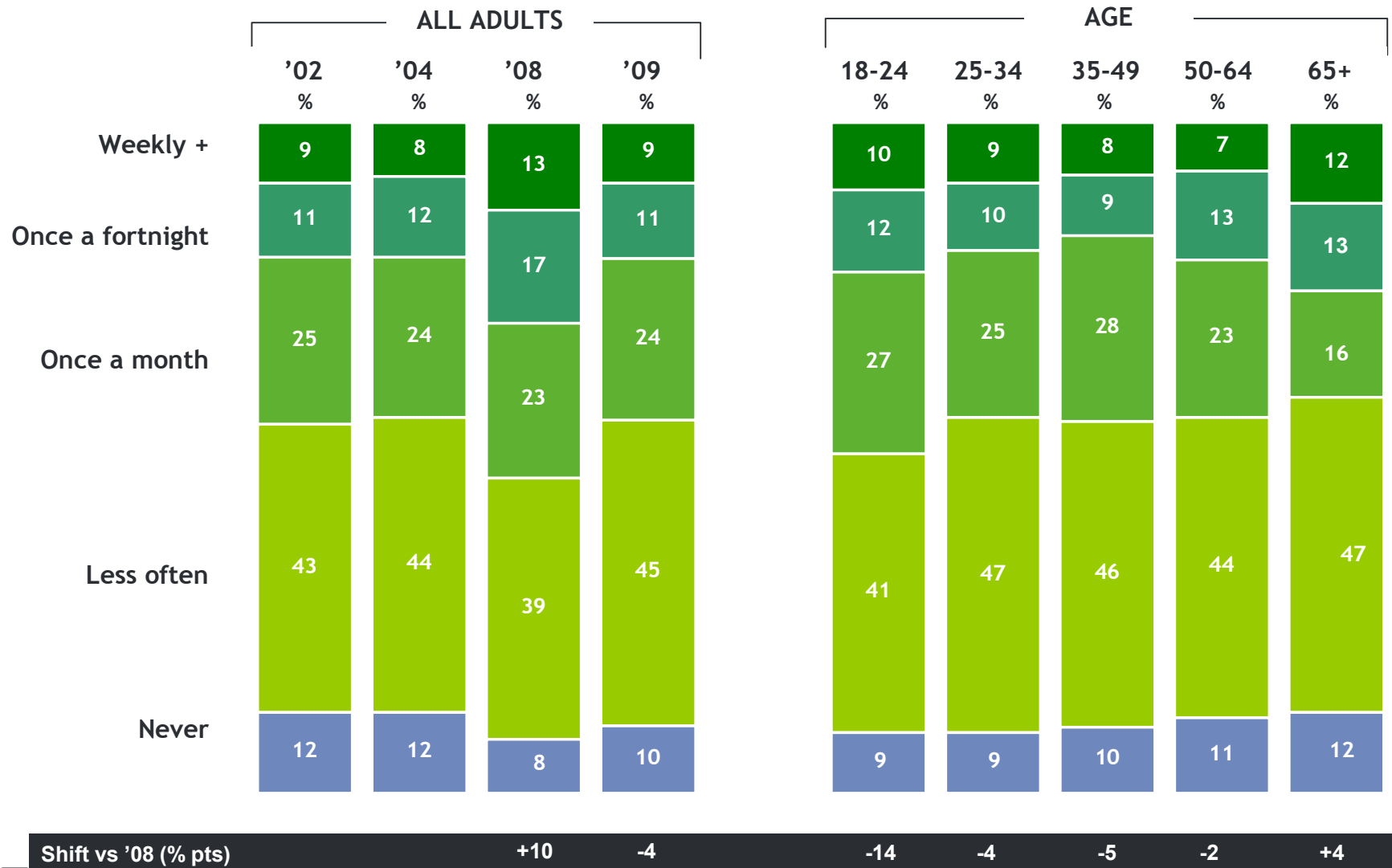
+1

+2

=

# Frequency of Visiting Formal Food Restaurants x Age

## 2002 - 2009

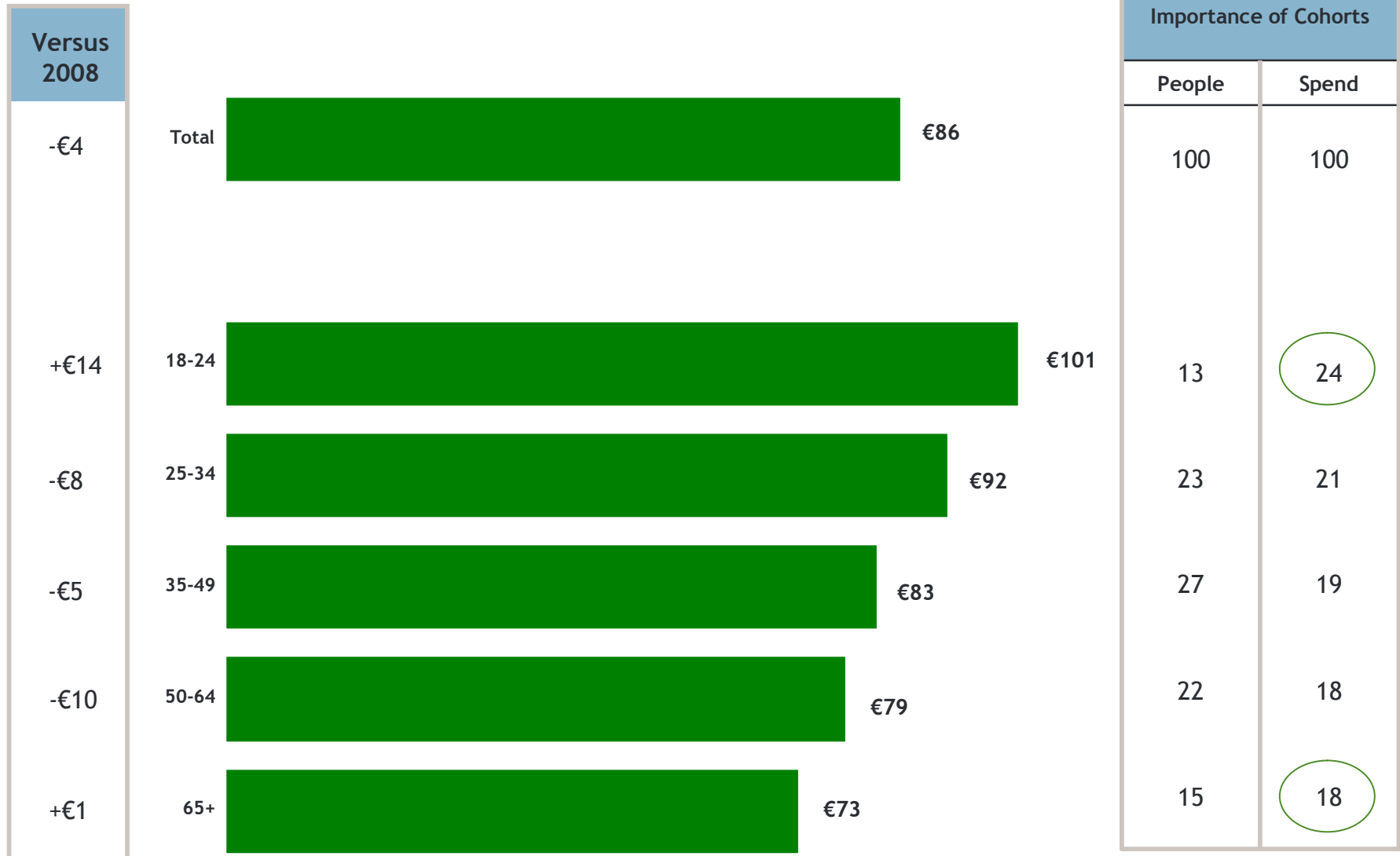


# Leisure Expenditure



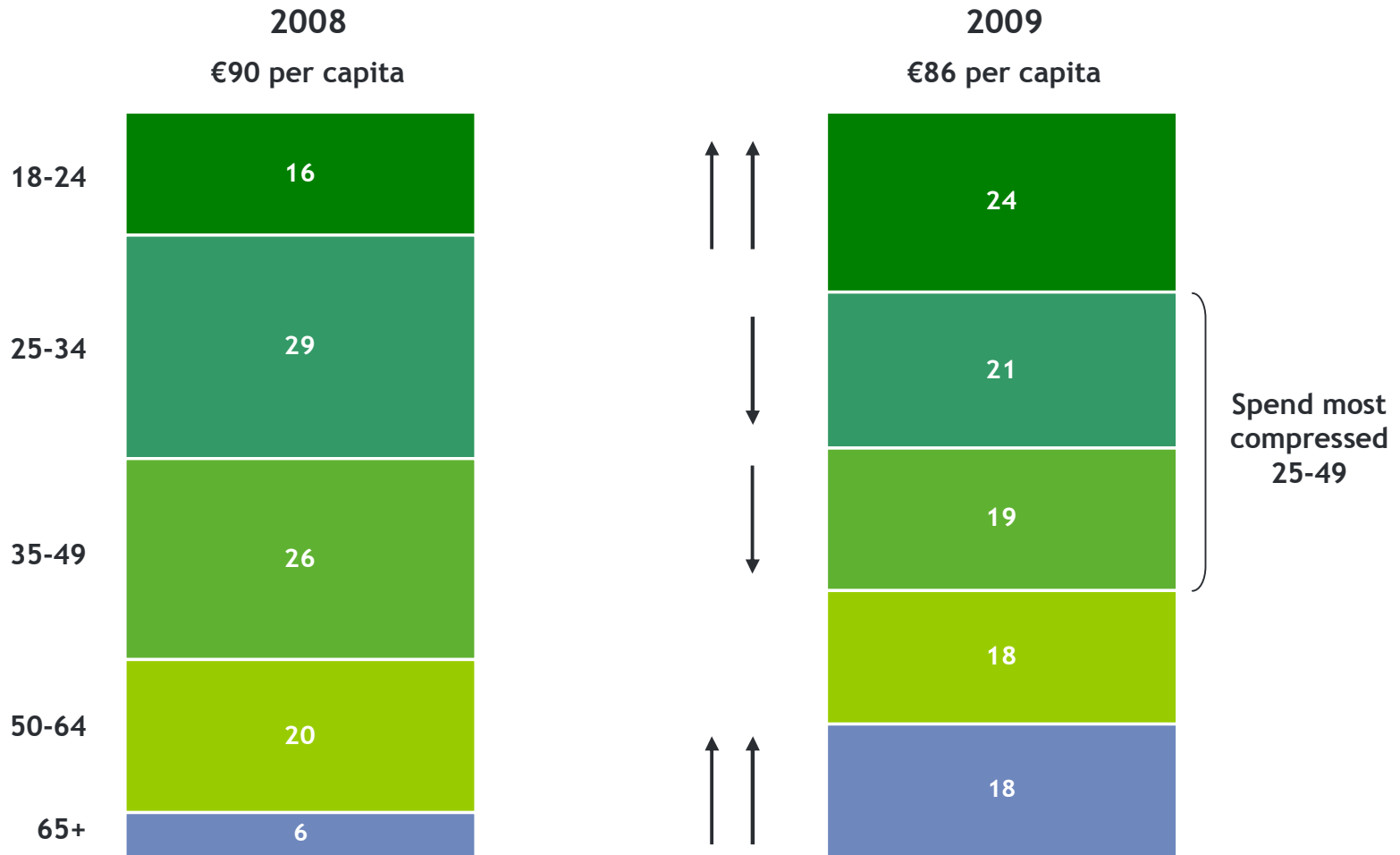
# Typical Expenditure Per Fortnight on Eating & Drinking

Pubs/home drinking/fast food and formal restaurants (Amongst those spending fortnightly)



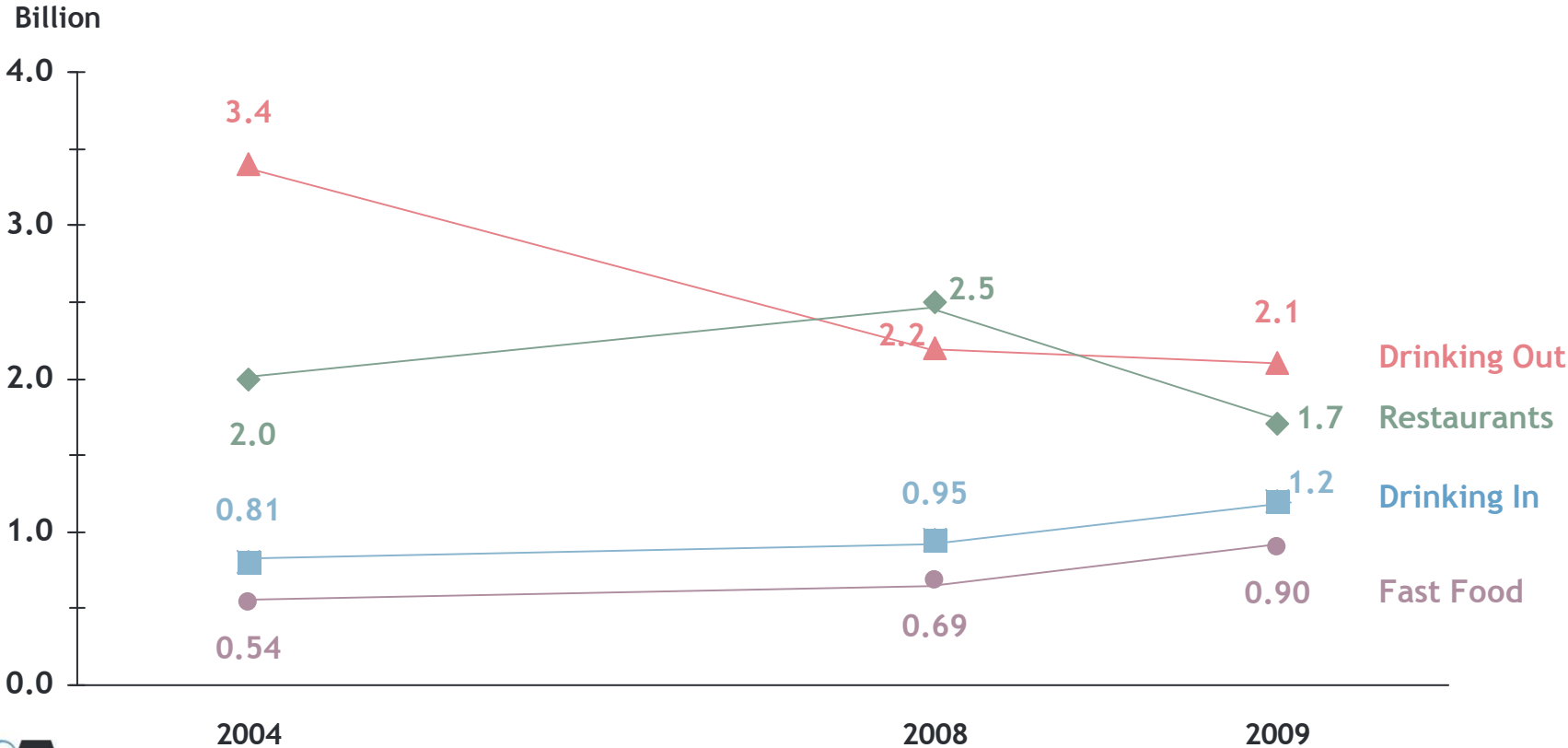
Very young and elderly spenders are now very important with 'family stage' spenders heavily compressed

# Year on Year Total Leisure Spend Shifts (Amongst those spending fortnightly)

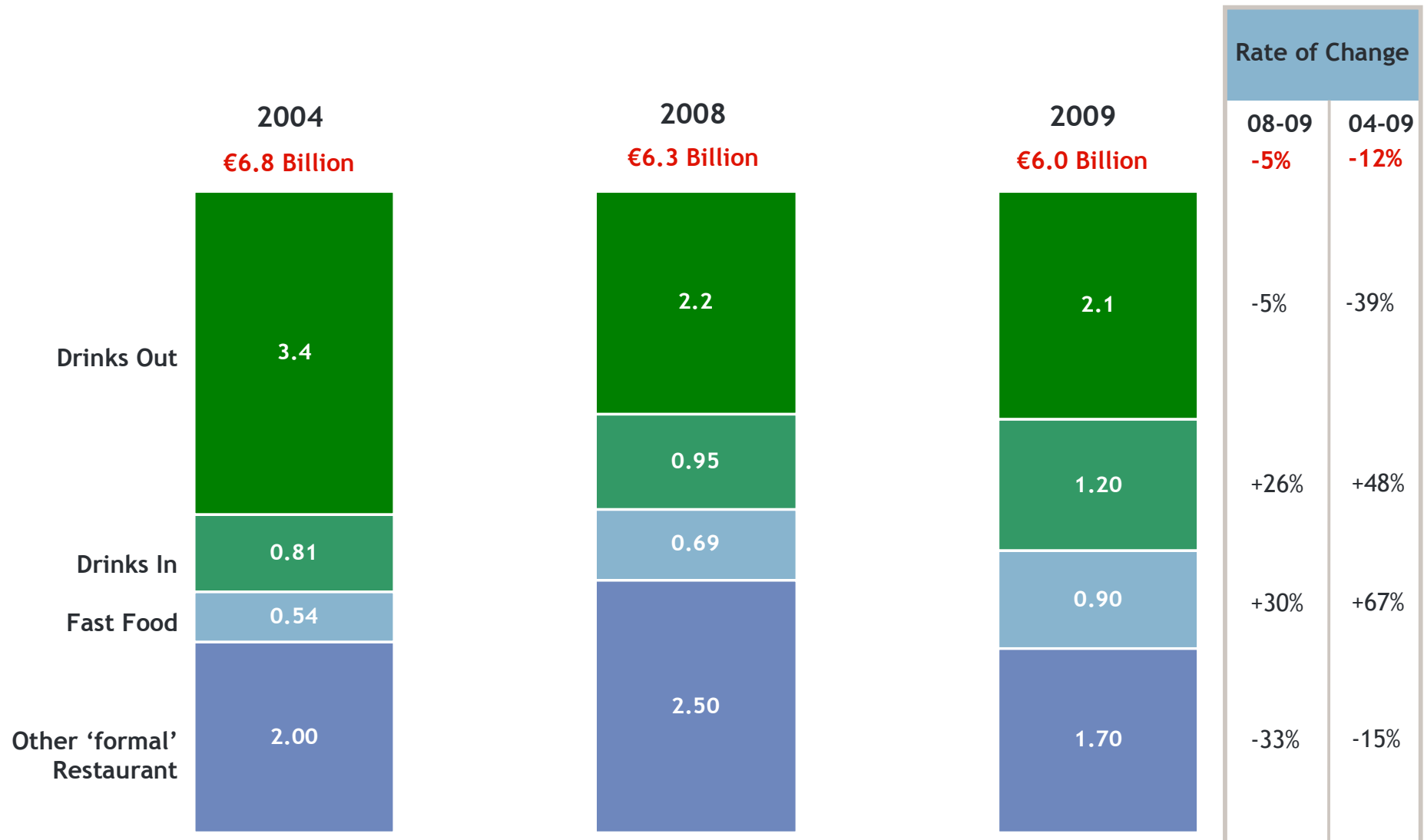


# Spend Shifts in Overview

- Number of 18+ adults : 3,362,000
- Average fortnightly leisure spend amongst total population is €68.71.
- Annual leisure spend projected at €6.0billion ... 5% less than in 2008 (6.3bn).



# Total Leisure Spend Value Shift: '04-'08



Restaurants down by a third year-on-year, while off-trade spend is up by a quarter (even though cost of take-home alcohol is dropping)

# Category Volume Shares X Age

