LOCAL PUB; LOCAL HUB?

THE FUTURE OF THE SCOTTISH COMMUNITY PUB

Commissioned by: Molson Coors Scotland Prepared by: Oliver Griffiths, Director, CR Consulting

August 2012 Briefing number: 012-8

FOREWORD

The affection in which pubs are held shines through in this report, as does the central role of pubs in the communities that they serve. The pubs in this report are not just watering holes; increasingly they are the community centre and the village hall, the bar staff are friends to the regulars. In some ways, this is not a surprise.

Working in beer, pubs have obviously been important to my life. But I am far from unique: for many of us pubs provide the convivial backdrop to important milestones – whether that's going for your first pint when you turn 18, heading out on a date or passing the time with friends and neighbours.

This report confirms a picture revealed in candid research we published last year: the community 'local' pubs we love, which are a part of our national and self image, are under threat. In some areas such as Argyll and Bute their numbers are in precipitous decline.

However, this research and examples of publicans such as one case study included in the report gives me huge hope for the future. It shows not only that people recognise the value of a pub in creating a community, but also the inventiveness of publicans as they face challenges with eyes wide open. At Molson Coors, it is our pleasure to work with publicans to help them get the most out of their business and serve their regulars better.

We do this not only because it is good for our business and theirs – and the 75,000 jobs reliant on the pub trade in Scotland – but also because we know that pubs have a positive role to play in some of the aims of government, most importantly to ensure that drinks are enjoyed responsibly.

However, to ensure that we can continue to enjoy a visit to the pub we are calling on policy makers to join with us in helping to achieve three goals:

1. The Scottish Government to lobby Westminster to end the duty escalator, which has resulted in the amount of tax on beer rise by 38 per cent since it was introduced. That is an additional £18,000 in tax per pub.

2. Simplify the business rates system and make it more transparent so that publicans can be assured that they are paying a fair amount of tax towards the communities in which they operate.

3. Strip out the process and cost of the licensing system so that those entrepreneurial enough to take on or open a pub are not discouraged at the first hurdle.

Achieving these goals will not be a panacea – we know this – but they will reduce the size of some of the major barriers that publicans face.

We are determined to tackle the challenges 'local' pubs face. We hope this report will convince you of their worth and of the importance of preserving them for our communities and for future generations.

Cheers,

Phil Whitehead
Managing Director, Molson Coors Scotland

CONTENTS

EXECUTIVE SUMMARY

The decline of local pubs is a prominent issue within many Scottish communities where such establishments provide an important service to the surrounding populace. Local pubs are an accessible, convenient and affordable place for residents to socialise with one another on a regular basis. Almost a third (32%) of adult Scots visit their 'local' at least twice a month – the second most frequently visited local amenity after the convenience shop – and 41% of Scottish men believe that it is important to have a community pub within walking distance of their home.

The image of the 'local' as a haunt for men of a certain age no longer seems appropriate, as research reveals that pubs serve a very broad cross section of Scottish society. Individuals in their mid to late twenties and those in the 25-44 age bracket are the most regular visitors (about a quarter visit at least one a fortnight), and whilst 75% of men sometimes visit so do over half of all women (54%). Indeed, many community pubs have made a conscious effort to attract women. By contrast retirees are now the least likely age group to visit - only 16% are regulars and 50% don't visit at all.

A number of changes within the alcohol market have occurred in recent years that have had a considerable effect on traditional pubs. These include the rising price premium for alcohol in pubs compared to the off-trade and a decrease in disposable income due to the recession. The smoking ban has also reduced the attraction of a trip to the pub for many smokers. When these factors are combined with a general rise in the cost of produce, including a 38% increase in duty in the last four years, it is apparent the industry as a whole is struggling. However, those pubs that recognise the situation and have managed to stake out a central position for themselves within the communities they serve, are thriving.

This success comes from an understanding of their current position and the limitations on what they can do. The result has been the development of a 'super-service' culture amongst the more successful community locals.

These pubs, which are as much community centres as they are licensed premises, are however, under threat: between 2007 and 2012, a total of 703 Scottish community pubs (19.1%) have closed down, with only 55 (1.5%) newly opened. Two or more community pubs have been lost from 67 of the 73 Scottish constituencies. Argyll and Bute lost an alarming 42 'locals'.

Optimism amongst Scottish drinkers is also low – three quarters of adults (76%) thought that community pub numbers would continue to diminish over the next ten years, to 2022. A small minority of 2% believed that, in time, they would increase.

Despite pessimism, there are reasons to be hopeful for the future:

- As other community centres wither, the sort of service community pubs can offer is genuine, local and increasingly rare
- Young and middle aged couples are looking for good pubs within walking distance; the loss of the heavy drinkers and the strong focus on customer service makes these pubs ideal – although they may not have fully identified the opportunity for themselves yet
- The investment in entertainment or a wider selection of drinks has made them more interesting
- At a time when 'genuine' and 'original' products are much sought after, pubs with character may fit very well
- Minimum Pricing may yet help them – encouraging the public to stockpile less as the bulk discounts dry up, and go out for a pint instead

INTRODUCTION

This research examines what is happening to the traditional Scottish community pub and how it is likely to evolve in the future. It is based on five sources:

- **a review of pub numbers** from the authoritative CGA database
- **an omnibus survey of 1000 consumers** carried out in Scotland in June 2012
- **interviews with four successful Scottish community pub licensees** (two Glasgow, one Edinburgh, one Dundee)
- **a variety of previously published surveys and sources**
- **a case study of a successful community pub group** is also described

BACKGROUND

Despite concerns about Scotland's high consumption of alcohol per capita, this is in at least short-term decline. In 2003 men averaged 20.3 units a week and women 9.1. Six years later in 2009, men were down to 17.5 units and women 7.8.

Alcohol consumption also declines with age - with relatively heavy drinking between 16-24 giving way to a plateau of more moderate drinking from 25-54, and consumption then dropping steadily with increasing age. This is broadly true for both men and women. In 2009 only the youngest age group (16-24) drank more in pubs as opposed to at home.

Figure 1 Mean weekly alcohol units (Alcohol Statistics Scotland 2011)

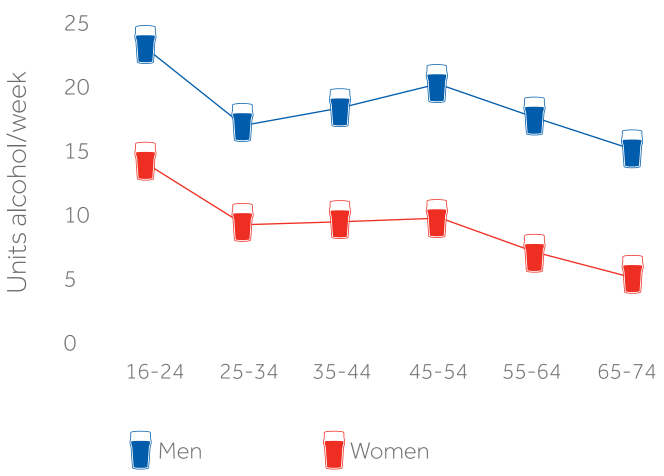
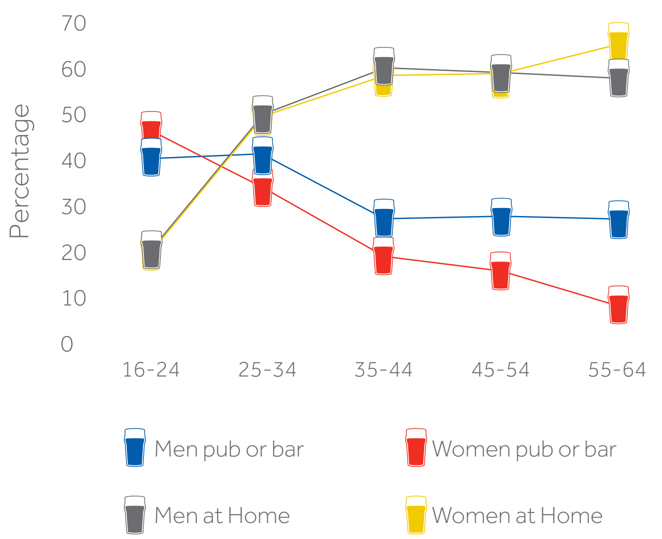


Figure 2 Place where drank most (Alcohol Statistics Scotland 2011)



[1] Alcohol Statistics Scotland 2011, Table 3.6

For the purposes of this study we are examining pubs that mainly serve drinks to their local residential community, who usually live within walking distance.

This is a sub-section of the much wider pub universe that ranges from gastro pubs, that are more restaurant than pub, through family pubs with play areas and lots of food service, to 'fun pubs' that are specifically aimed at young people. The traditional local is a place where people who live nearby get together over a drink.

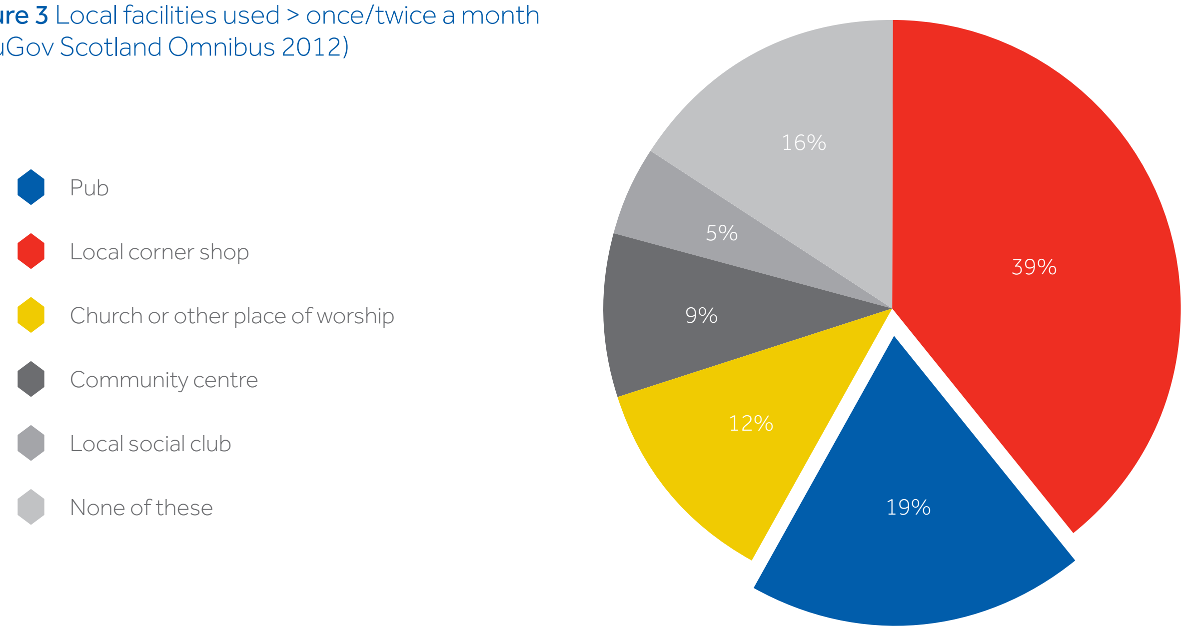
WHAT IS THE POINT OF THE LOCAL COMMUNITY PUB?

The traditional local is a very important meeting place for the local community. The omnibus research found that people walk to visit a traditional community pub more frequently than their local church, social club or community centre, with a third (32%) visiting at least once or twice a month. The only people likely to attend church more than the pub are those that are retired and/or widowed.

The 'corner shop', whether owned independently or by one of the grocery multiples, is visited more frequently than the pub (66%) but the opportunity for sustained social interaction with other users is obviously much more limited and this is more of a transactional than a leisure purchase.

Whether people are locally focused or not seems to be closely related to their economic wellbeing; 94% of unemployed people regularly use one or more of these local facilities, whilst only 69% of ABC1s do. Overall more than a quarter (27%) of local residents rarely if ever use the local shop or community resources.

Figure 3 Local facilities used > once/twice a month (YouGov Scotland Omnibus 2012)



Operators of traditional local community pubs set themselves apart from their principal competitors – supermarkets and big new pubs.

- '[Competitors] offer a product. We offer a service. For them it's just a job: numbers, figures, per-centages; for us it's a wee chat over the bar…'

These pubs offer a community to which customers belong on the occasions that they visit – and increasingly, this doesn't necessarily mean the pub next door.

- 'Our customers walk past two or three other pubs to come here'.
- 'The core of our business is still regulars and that includes people who may have moved a mile or two away but still think of us as their local… previously our regulars lived locally'
- 'We are much more of a destination pub nowadays, although almost all of our customers still live within walking distance.'
- 'All pubs are destination pubs nowadays – you have to make a conscious decision to visit a pub.'

The key draw seems to be the feeling of community and companionship, especially as other community institutions shut down and workplaces shed some or all of their workers. Continuity is key and above all the opportunity to take part in, or listen to, a conversation or to have a little banter with the barstaff.

There seems to be a desire to keep things safe and as they were but, as we shall see below, successful operators are in fact working hard to reflect the changing needs and evolving customer base

- 'We do change but everything is gradual and subtle. Customers think the pub has always been this way but it has actually changed a lot'
- 'The big thing for [the customers] is the feeling of continuity …it's very reassuring'

This reassurance goes way beyond a little banter:

- 'We're …unpaid social workers providing warmth and company'
- 'We're unpaid community wardens'

THE MARKET FOR THE MODERN LOCAL

Men come out strongly in favour (41% important, 28% unimportant; net +13%) of having a traditional pub within walking distance.

Following the experimental age (16-24), when drinking takes place more in pubs than at home, and drinking habits become more settled, the local rises in importance. It is most important to people in their early middle years (25-44), but gradually drops in importance as people get older and more settled. The most receptive market for the local would appear to be 25-44 and living as married.

This is a market that the more forward-thinking are starting to tap, although it would appear that this is not generally part of a well-thought out plan; still less a conscious marketing strategy.

As their traditional clientele has ebbed away, the reassuring and friendly atmosphere of the good local has opened up new possibilities.

Whilst none of the operators were doing better than 10 or 20 years ago they felt that their slippage was only minor. New customers had emerged who actually preferred the quieter atmosphere when the 'hard drinkers' moved away and the pubs became less noisy, boisterous and overwhelmingly male.

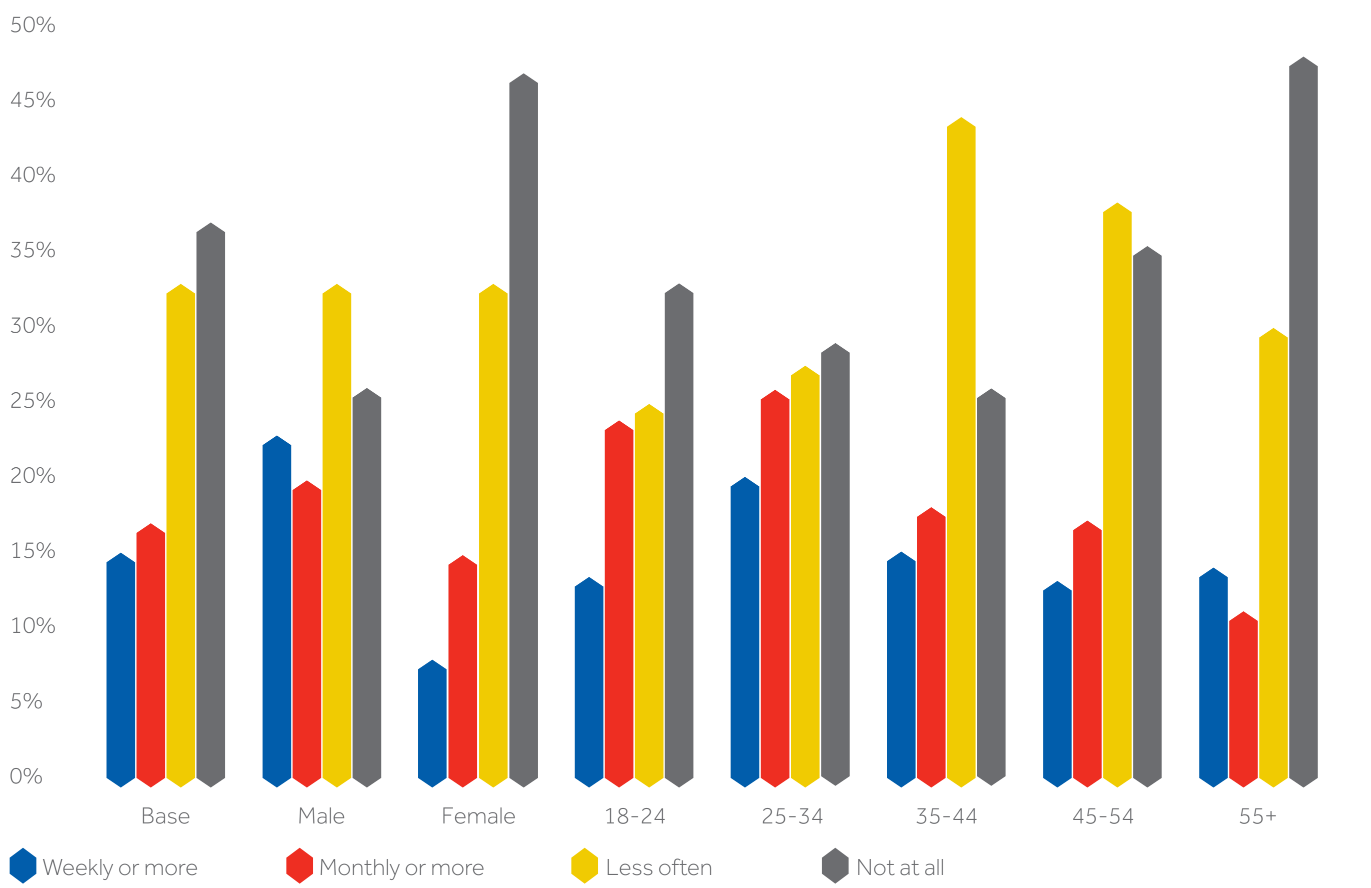
Women now find them safe and pleasant places to visit, couples come in and enjoy a quiet pint together and families come in to celebrate special occasions. One even saw the reappearance of the old tradition of a father having his first pint with his son.

- 'We're an old-fashioned shipyard pub. There never used to be any women in here at all, now people bring their wives and some single women come in - even older ones'
- 'We are very female-friendly and women feel comfortable coming in on their own or together for a drink or two before heading into town'
- 'Going back 20 years you'd wonder about the motives of a woman coming into the pub on her own. Now they come in and it's really nice and safe'

THE USERS OF THE LOCAL

Perhaps unsurprisingly, the average local is still favoured by men: three quarters (75%) of men visit. However, in contrast to the past, so too do just over half of all women (54%). For the regular users - who go at least once a fortnight the difference is greater (32% to 10%), suggesting that about a quarter of customers are female – quite a turnaround for outlets, many of which were extremely female-unfriendly until relatively recently.

Figure 4 Frequency of visit to community local (YouGov 2012)



Over a third (38%) of people 'living as married' are regulars, twice as many as any other group, with the exception of 'never marrieds' at 22%. These 25-44 year old 'living as marrieds' appear to be a sweetspot for the industry.

Retirees are the least likely visitors - only 16% are regulars and 50% don't visit at all, although for the successful operators questioned they formed an important part of the weekday trade.

This was however gradually disappearing and being replaced by other groups:

- 'The grey trade is really important for us – the sort of people who have got their pensions and financial arrangements sorted out
- 'The way that the trade is going I can see ordinary pubs only opening at the weekend'
- 'The weekend trade is much more varied with younger people and couples'

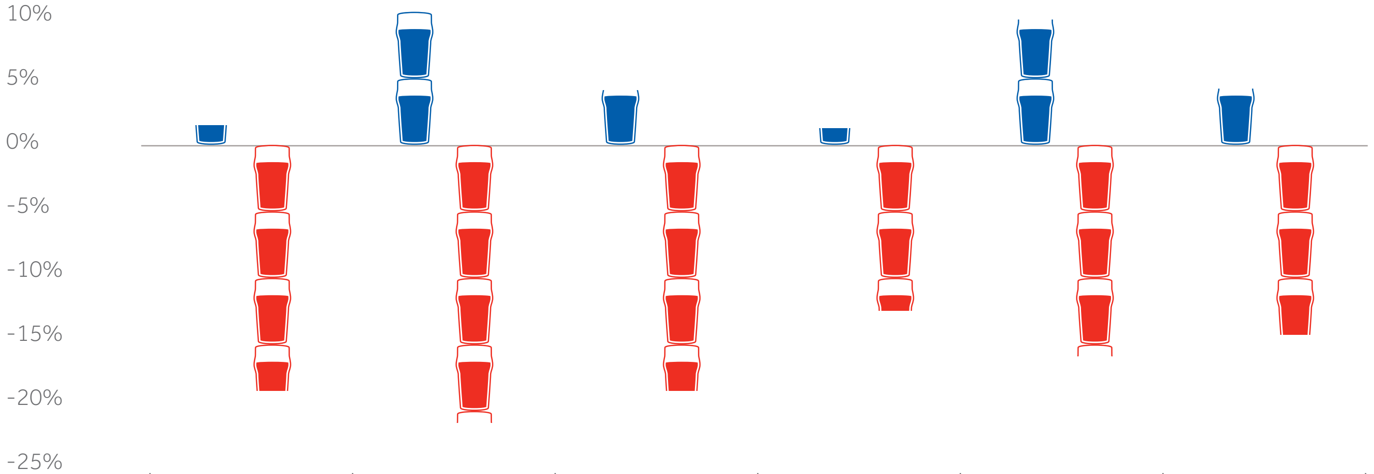
DECLINING PUB NUMBERS

We commissioned CGA Strategy to identify the numbers of pubs that had opened and closed in the five years to March 2012 and, within this, specifically community pubs.

Between 2007 and 2012 one in five Scottish pubs (20.1%; 1,190 premises) ceased trading as pubs as they either shut down or changed use. This was a significantly faster closure rate than for England (15.1%; 8,981) and equivalent to almost five Scottish pubs closing each and every week over the last five years.

This was offset to a limited extent by a much smaller number of pub openings (269; 4.5% in Scotland) and 2,778; 4.7% in England); but even so, on average, every week there were three fewer pubs in Scotland than the week before.

Figure 5 Pub numbers England/Scotland (CGA 2012)



	Scotland Community Pubs	Scotland Others	Scotland Total	England Community Pubs	England Others	England Total
Openings	1.5%	9.5%	4.5%	1.3%	8.7%	4.7%
Closures	-19.1%	-21.6%	-19.8%	-13.7%	-16.9%	-15.1%

For community pubs in Scotland the situation was much bleaker as the closure rate was high (19.1%). Some pubs ceased trading as community pubs and just 55 (1.5%) pubs opened as community outlets over the whole five years. In Scotland, only 30 pubs made the decision to change from being community pubs to become other forms of pub, such as pub restaurants. In contrast, in England, the redevelopment of pubs into other formats – rather than just closing – was far more marked with 598 taking this route.

These results were even more negative than for England - with proportionately more community pubs closing and fewer opening than south of the border. This is also more significant as 60% of Scottish pubs are classified as community outlets.

At least two community pubs were lost in all but six Scottish parliamentary constituencies. Five constituencies (Inverness & Nairn, Cumbernauld & Kilsyth, Perthshire South & Kinross-shire, Argyll & Bute and Perthshire North) lost 30% or more of their community pubs in the space of those five years. Argyll & Bute had the highest number of community pub closures overall (42).

Figure 6 Change in pub numbers (CGA 2012)

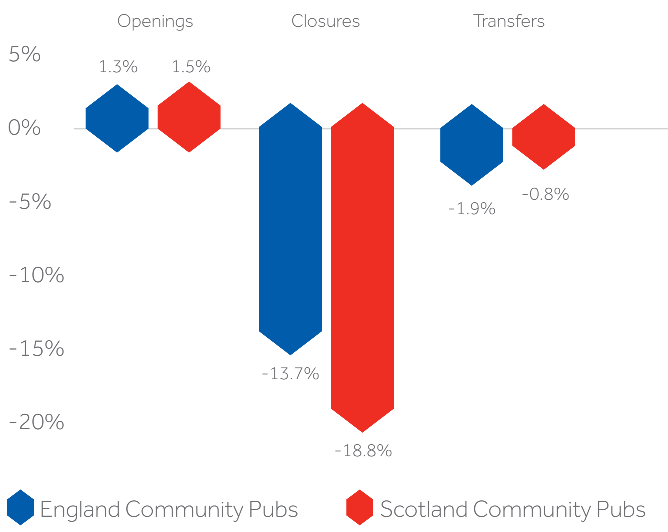
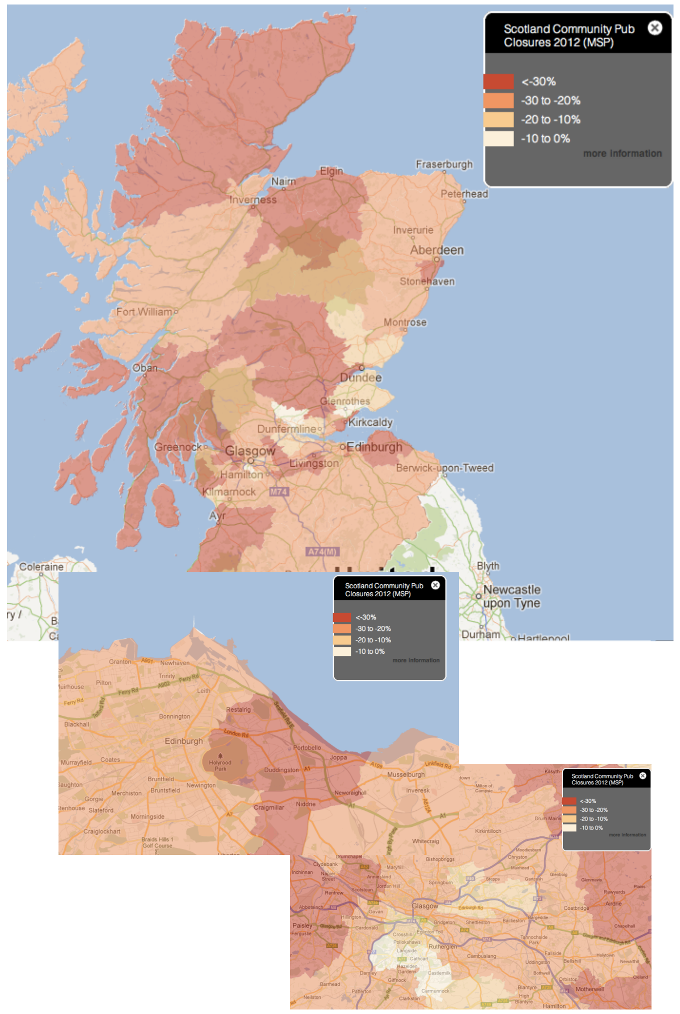


Figure 7 Community pub losses by MSP constituency (CGA 2012)
An interactive map showing each constituency and the number of openings and closures can be found at http://www.maptube.org/map.aspx?mapid=1214



CAUSES OF THE DECLINE IN COMMUNITY PUB NUMBERS

There are a number of short and long-term reasons for community pub closures. Most are well-documented and are closely interrelated:

- The gradual long-term drift to drinking at home and away from beer has cut the volume of beer consumed in the UK on-trade by 20% between 2007 and 2010 (statistics are not available for the whole 2007-12 period), at a time when the same source estimated the total number of pub closures to be 10%.
- The recession of the late 2000's closed some large employers and had a very marked effect on some traditional heavy users of community pubs
    - 'The building trade used to be hard-working and enjoyed a drink and earned good money, that's all gone.'
    - 'Our business used to be [based on] construction labourers - but their jobs were decimated in the recession.'
- The increasing price competition
- Seemingly ever-rising costs and taxes
    - 'VAT went up again and we just haven't been able to pass this on to the customers, who are finding it hard enough themselves'
- The smoking ban affecting traditional drinking patterns
    - 'They came down from the flats upstairs because they wouldn't smoke in their own homes. They were a bunch of very regular and hardened drinkers...four pints at lunchtime and then six in the evening'
- Increased competition from those in the industry with economies of scale
    - 'They were selling at 99p a pint in January...we just can't compete with that'
    - 'I concentrate on other areas of the business than price'

[2] BBPA, UK Quarterly Beer Barometer, accessed at http://www.beerandpub.com/statistics

PRICING AND MINIMUM PRICING

Whilst times are hard for the average pub - with 53% of licensees reporting that they made less money in 2011 than in the previous year - the competitive threat to their business does not primarily come from other pubs (only 15% raised this as a major concern), but rather from the off-trade (43%).

Inevitably the bulk buying and low staff-customer ratios of larger pubs gives them a considerable price advantage over even the most pared-down and efficient community pub.

The successful community pub owners have learnt that they cannot compete head on with them, and to avoid the temptation to get embroiled in a local price war with other locals:

- 'A pub opened up down the road selling at £1 a pint cheaper but we kept our trade. They're still selling at 10p/pint cheaper and we're still here'

They have to charge a premium, and they have to be able to justify it to their customers – some of whom have very limited incomes.

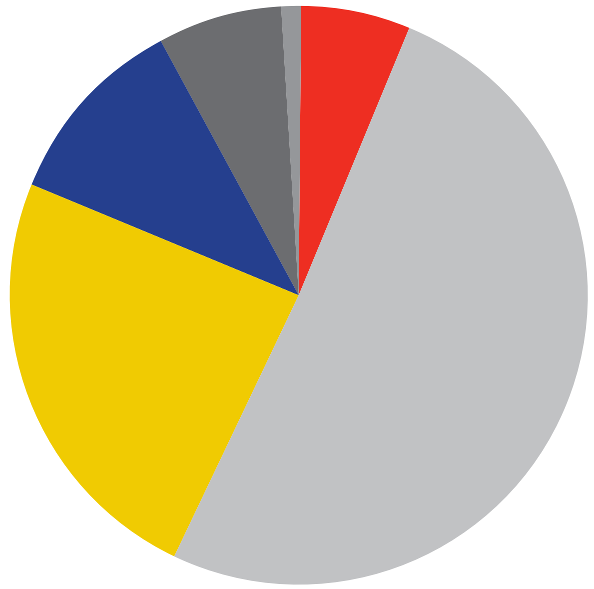
The Scottish Government policy of pricing all alcohol at a minimum of 50p/unit is likely to have a dramatic effect on alcohol sales in the off-trade. NHS Scotland reported that 80% of sales to this sector in 2011 were priced at between 25p and 50p/pint , and so almost all of these prices would be increased by the new legislation -some actually doubling. Whilst many people see this as being socially worthwhile in cutting problem drinking, almost no consumers (6%) felt that this would help to increase trade for pubs and 36% felt that it would decrease sales.

Licensees were a little more optimistic:

- 'Minimum pricing should help and it certainly cannot harm us'.

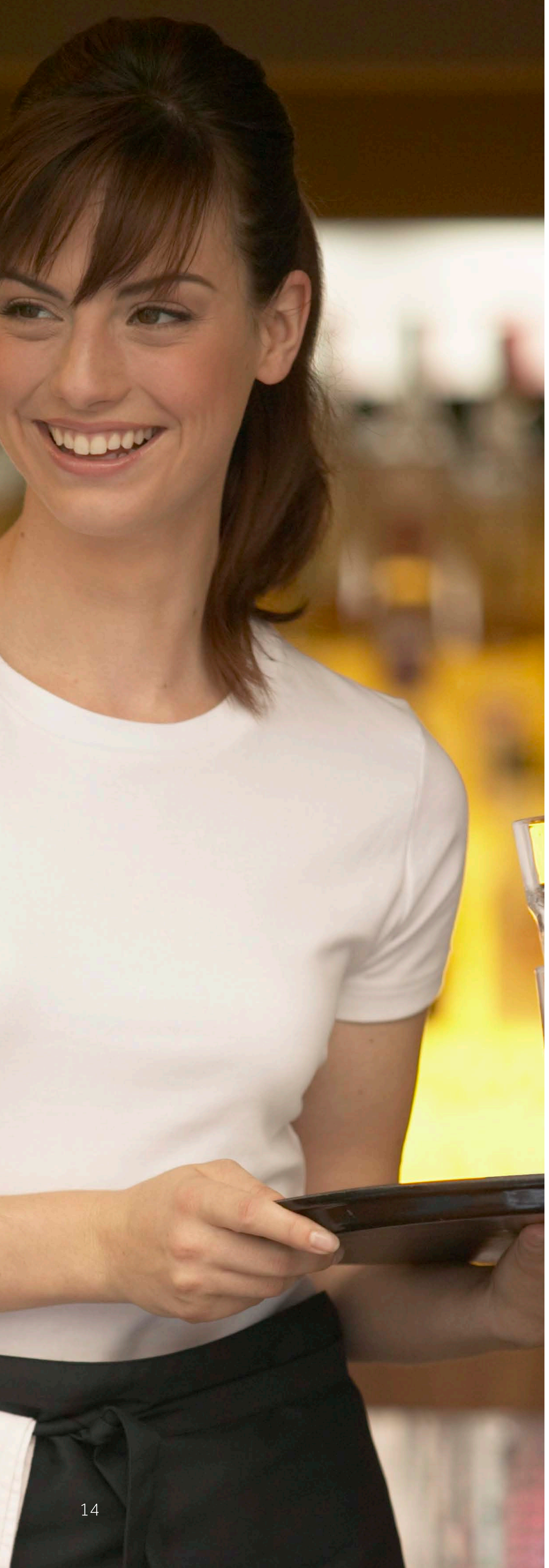
The issue therefore remains of how to justify the inevitable price premium that will still remain for the smaller operator. The answer seems to be at least in part what might be called super-service.

Figure 8 Likely impact of minimum pricing on alcohol sales in pubs (YouGov 2012)



- Increase sales a lot
- Increase sales a little
- Make no difference to sales
- Decrease sales a little
- Decrease sales a lot
- Don't know

[3] Publican's Morning Advertiser Pub Market Report 2012
[4] Alcohol Statistics Scotland 2011 Figure 2.2



DELIVERING SUPER-SERVICE

All of the pub operators had evolved their own kinds of extremely high levels of customer care.

There clearly is no magic formula, some do quiz nights, music nights, and even cocktail nights; some do none at all. They all however keep tabs on their customers and ensure that they are cared for when in the pub and away from it:

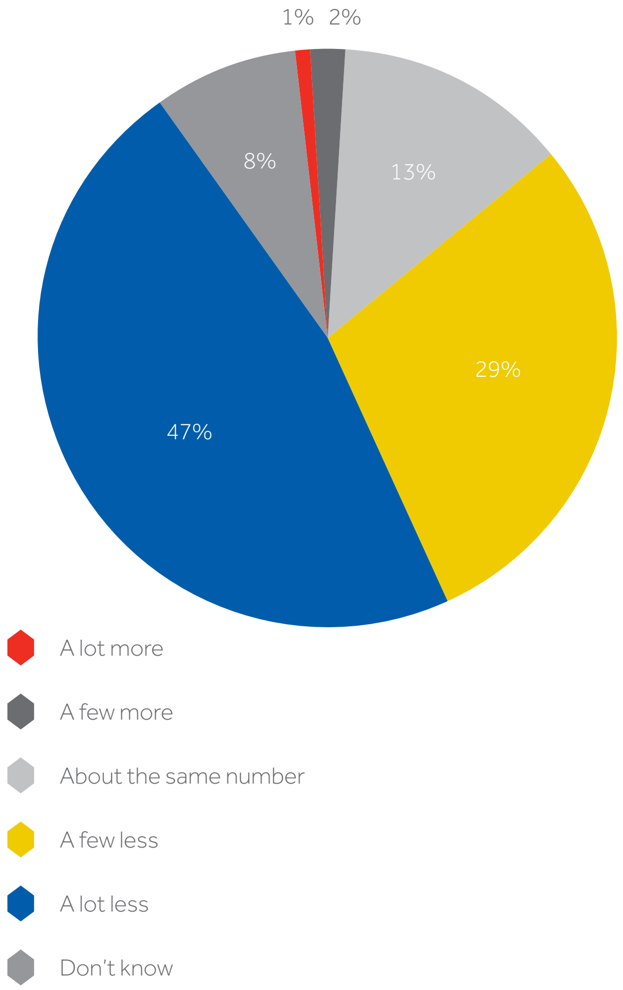
- 'We are on first name terms with pretty well all of the customers'
- 'We've got a shop across the road and the girls will nip across for a loaf or a pint of milk [for our regulars]'
- 'We offer a really polished service. It's about knowing your customers, talking to them and being there'
- 'If they end up having a little more than they should we'll always call a cab or someone will walk them home'
- 'The staff are key - they really value our customers and word is getting out that they really care... They're not just staff, they're pals'
- 'We check on customers if they don't come in. they might be ill ...or going to another pub. They really appreciate that we bother'
- 'We're too nice and friendly for nasty people to want to come in'

If one word can sum up the approach it is friendliness, with almost nothing being too much trouble.

THE FUTURE OF THE COMMUNITY PUB

The Omnibus asked interviewees to take into account the recent trends in prices and legislation in pubs, e.g. increasing taxation, price rises on beer and spirits, and tighter regulations such as health and safety and employment, and consider what these might mean for the future of the community pub. The answer was bleak.

Figure 9 More or less community pubs in ten years' time if current trends continue (YouGov 2012)



Three quarters (76%) thought that their numbers would diminish over the next ten years (to 2022), with almost half (44%) believing that there would be 'a lot' fewer community pubs by then. Only 2% believed that their numbers would increase.

In every socio-demographic group with the exception of 18-24 year olds and full-time students, more than 2/3 of people thought that the numbers would decrease.

The licensees are equally pessimistic for the future of many community pubs. They themselves had been spurred to innovate by the increasing competition:

- '[Competition] has forced pubs to invest to make themselves nice places to go'
- 'Our business just dived in 2008/9. We have had to fight to bring it back'
- 'We've had to raise our game – we've improved our range of products – beers and wines. We do more with cask ale ...the whole pub experience is more interesting'
- 'Cask ale has grown for us and we now do more than we have before. It brings in a new clientele'
- 'We've got to keep [our customers] interested'

They see many operators as being either lazy or unimaginative in an industry that now has too many outlets to support the volume of business.

- 'Those that have gone out of business have failed to innovate or to offer anything of substance'
- 'It's not just about hard work – the strongest will survive and the weakest won't'
- 'There are too many people after slices of a shrinking pie. We need to limit the number of licenses'

CASE STUDY: ANNA CHRISTOPHERSON, PUBLICAN, EDINBURGH

In 2004, Anna Christopherson and her husband Mike opened their first pub, Boda Bar, on Leith Walk. Having moved from Sweden, Anna wanted a venue that was cosy, relaxing and, importantly, female-friendly. It proved a winning strategy and now Anna owns five pubs in Edinburgh and Leith.

Over the eight year period Leith Walk, on which three of her pubs sit, has experienced a steep decline in footfall, reducing the passing trade that a pub could hope easily to attract. Anna knew that the success of her business would rely on making the pub more of a destination. As well as providing fantastic drinks, that meant putting on events and services to create a community of regulars.

Today, Anna and Mike's five pubs offer activities as diverse as jogging clubs, knitting, baking, clothes swaps, language classes, film nights and even an internet radio show. In short, Anna diversified her business, offering services and events that in the past had been offered by local churches, community centres and organisations like the Women's Institute.

In Anna's words the result has been "that we have people who come in to try something they'll think they would enjoy, and then they come back. They gradually become our friends. For us, that's important, to be part of a community in a really urban area. When we moved here it was difficult to find that, I think, and if you're to thrive today you need to give something a little extra and make the pub the heart of the area you're in, which is welcoming to everyone."

Anna and her husband Mike own Boda Bar, Sofi's and Victoria in Leith, and Joseph Pearce's and Hemma in Edinburgh.

CONCLUSIONS

All of the statistics and views encountered in this study indicated that the future for the community pub is going to be tough.

Those that have survived and built up a new customer base have had to go through a painful and expensive evolution. Many others will not have the drive, desire, resources or ability to deliver their super-serviced, low price model and it seems likely that many will continue to close as drink sales decrease and superpubs extend their grip on local markets.

Smaller community pubs need help to identify their new local markets, change their offer and communicate effectively.

There are however reasons for hope:

- As other community centres wither the sort of service offered is genuine, local and increasingly rare
- Young and middle aged couples are looking for good pubs within walking distance; the loss of the heavy drinkers and the strong focus on customer service makes these pubs ideal – although they may not have fully identified the opportunity for themselves yet
- The investment in entertainment or a wider selection of drinks has made them more interesting
- At a time when 'genuine' and 'original' products are much sought after, pubs with character may fit very well
- Minimum Pricing may yet help them – encouraging the public to stockpile less as the bulk discounts dry up, and go out for a pint instead

The old heavy drinking manual worker trade which was the mainstay of many community pubs with almost no facilities, and a threatening atmosphere for outsiders are increasingly things of the past.

The local super-serviced pub that trades on its heritage, works hard to establish a relationship with its customers and welcomes all seems very likely to survive – and even to flourish.

APPENDIX

		Total Outlets		Change 2007-12				
	Constituency	Mar 07	Mar 12	Openings	Closures	Transfers	Total	%
30% +	Inverness and Nairn	59	38	1	22	0	-21	-36%
	Cumbernauld and Kilsyth	18	12	1	5	2	-6	-33%
	Perthshire South and Kinrossshire	61	41	0	20	0	-20	-33%
	Argyll and Bute	136	93	0	42	1	-43	-32%
	Perthshire North	118	83	3	37	1	-35	-30%
20-30%	Glasgow Anniesland	17	12	1	5	1	-5	-29%
	Moray	71	51	0	19	1	-20	-28%
	Renfrewshire North and West	32	23	0	7	2	-9	-28%
	Carrick, Cumnock and Doon Valley	98	71	1	25	3	-27	-28%
	Edinburgh Eastern	31	23	0	6	2	-8	-26%
	Motherwell and Wishaw	49	37	1	13	0	-12	-24%
	Paisley	42	32	1	9	2	-10	-24%
	Dumbarton	55	42	0	15	-2	-13	-24%
	Caithness, Sutherland and Ross	85	65	1	21	0	-20	-24%
	Almond Valley	30	23	0	7	0	-7	-23%
	Dundee City West	49	38	2	10	3	-11	-22%
	Ayr	63	49	0	16	-2	-14	-22%
	Shetland Islands	18	14	0	4	0	-4	-22%
	Airdrie and Shotts	50	39	2	13	0	-11	-22%
	Cunninghame North	70	55	2	17	0	-15	-21%
	East Lothian	61	48	1	14	0	-13	-21%
	Aberdeen South and North Kincardine	24	19	1	7	-1	-5	-21%
	Kirkcaldy	54	43	0	11	0	-11	-20%
	Kilmarnock and Irvine Valley	70	56	1	13	2	-14	-20%
	Clydebank and Milngavie	25	20	0	4	1	-5	-20%
	Na h-Eileanan an Iar	20	16	0	3	1	-4	-20%
	Aberdeen Donside	15	12	0	2	1	-3	-20%
	Dumfriesshire	87	70	1	17	1	-17	-20%
	Coatbridge and Chryston	36	29	0	7	0	-7	-19%
10-20%	Midlothian North and Musselburgh	52	42	0	8	2	-10	-19%
	Midlothian South, Tweeddale and Lauderdale	52	42	0	10	0	-10	-19%
	Glasgow Pollok	21	17	1	5	0	-4	-19%
	Glasgow Kelvin	90	73	5	16	6	-17	-19%
	Angus North and Mearns	48	39	2	11	0	-9	-19%
	Stirling	75	61	1	15	0	-14	-19%
	Ettrick, Roxburgh and Berwickshire	97	79	1	18	1	-18	-19%
	Skye, Lochaber and Badenoch	108	88	0	18	2	-20	-19%
	Glasgow Maryhill and Springburn	33	27	0	6	0	-6	-18%
	Rutherglen	61	50	0	10	1	-11	-18%
	Cowdenbeath	57	47	0	10	0	-10	-18%
	Orkney Islands	23	19	0	4	0	-4	-17%
	Greenock and Inverclyde	35	29	0	7	-1	-6	-17%
	Linlithgow	47	39	1	8	1	-8	-17%
	Edinburgh Northern and Leith	72	60	2	12	2	-12	-17%
	Eastwood	6	5	0	1	0	-1	-17%
	Aberdeenshire West	44	37	0	7	0	-7	-16%
	Uddingston and Bellshill	44	37	1	8	0	-7	-16%
	Edinburgh Southern	26	22	1	5	0	-4	-15%
	Hamilton, Larkhall and Stonehouse	46	39	2	9	0	-7	-15%
	Edinburgh Central	83	71	1	8	5	-12	-14%
	Aberdeen Central	60	52	0	9	-1	-8	-13%
	Clydesdale	60	52	0	8	0	-8	-13%
	Edinburgh Western	23	20	0	3	0	-3	-13%
	Aberdeenshire East	39	34	0	6	-1	-5	-13%
	Renfrewshire South	41	36	1	6	0	-5	-12%
	Strathkelvin and Bearsden	26	23	0	3	0	-3	-12%
	Galloway and West Dumfries	101	90	3	14	0	-11	-11%
	Banffshire and Buchan Coast	47	42	0	4	1	-5	-11%
	Edinburgh Pentlands	19	17	1	3	0	-2	-11%
	Glasgow Shettleston	87	78	3	14	-2	-9	-10%
	Dundee City East	39	35	0	4	0	-4	-10%
	Angus South	52	47	0	5	0	-5	-10%
0-10%	Glasgow Southside	57	52	1	8	-2	-5	-9%
	Cunninghame South	46	42	0	3	1	-4	-9%
	North East Fife	70	64	0	7	-1	-6	-9%
	Falkirk West	40	37	0	3	0	-3	-8%
	East Kilbride	14	13	0	2	-1	-1	-7%
	Falkirk East	48	45	1	4	0	-3	-6%
	Glasgow Provan	16	15	0	2	-1	-1	-6%
	Dunfermline	40	38	2	4	0	-2	-5%
	Glasgow Cathcart	13	13	0	1	-1	0	0%
Increase	Clackmannanshire and Dunblane	37	38	2	1	0	1	3%
	Mid Fife and Glenrothes	34	35	3	2	0	1	3%
	Total	3,673	2,995	55	703	30	-678	-18%


MOLSON Coors