

# Monitoring and Evaluating Scotland's Alcohol Strategy (MESAS)

## An update of alcohol sales and price band analyses

August 2011

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### Purpose

To contribute to the development and evaluation of Scotland's Alcohol Strategy by providing accurate and up-to-date analyses of data on alcohol sales and price in Scotland and England & Wales.

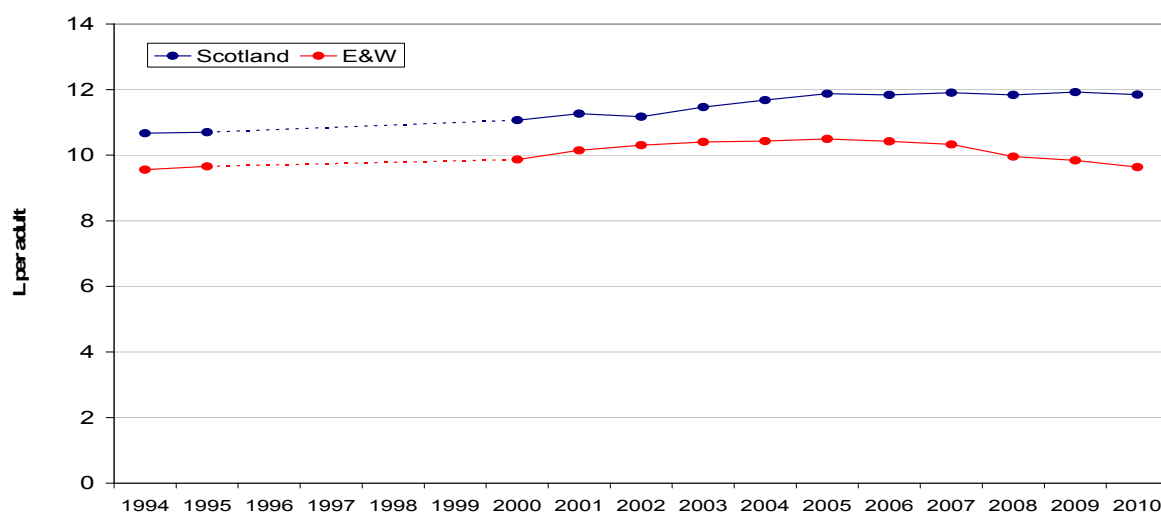
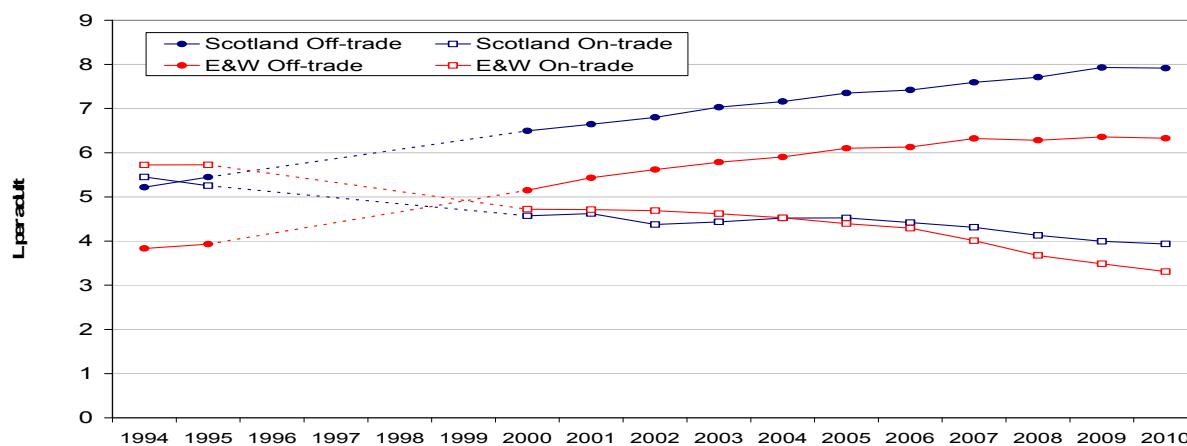
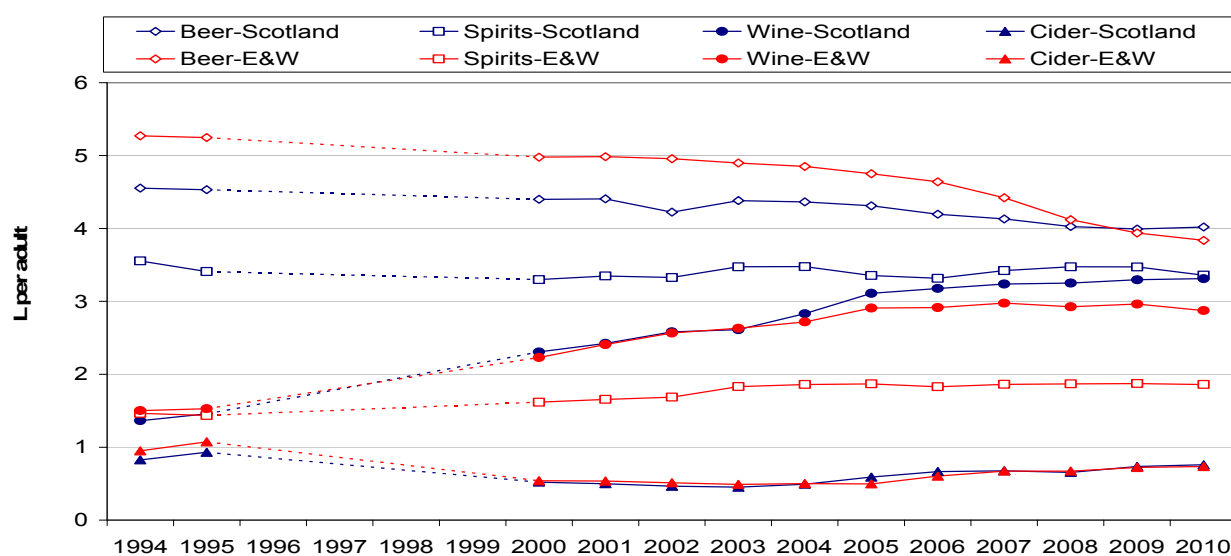
### Methods

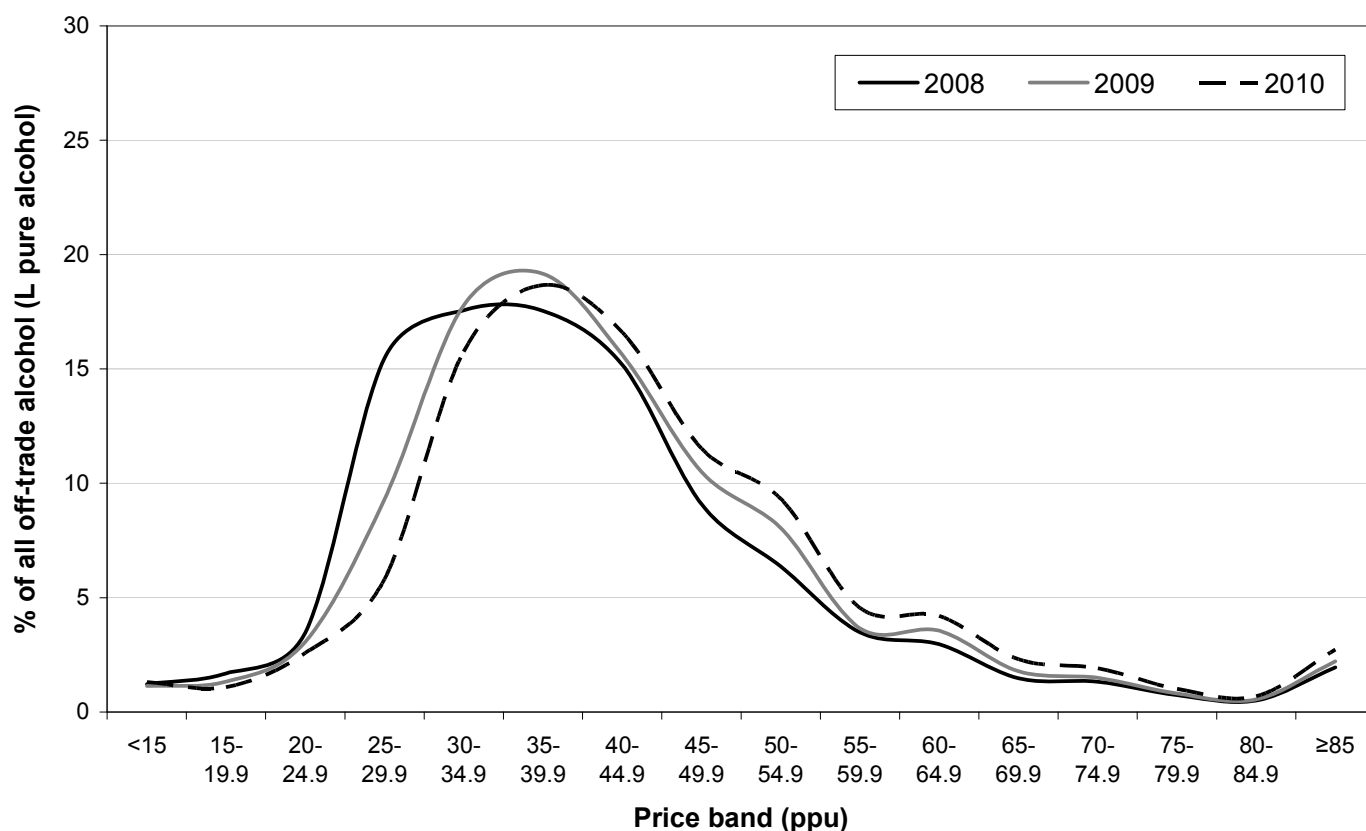
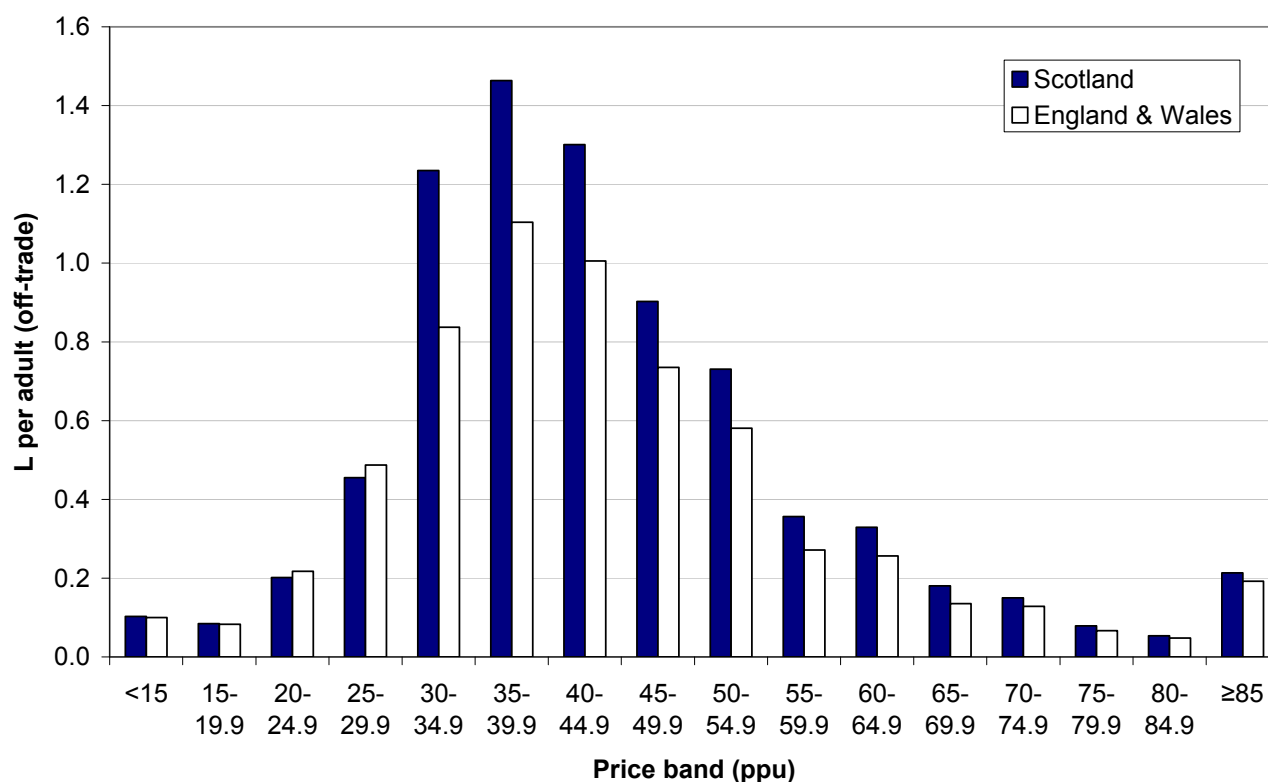
Pure alcohol sales data derived from electronic sales records and retail outlet sampling were provided by The Nielsen Company and CGA Strategy and used to describe trends in total alcohol sales in Scotland and England & Wales. Per capita sales were calculated for adults aged  $\geq 16$  years. The volume of pure alcohol sold in off-sales in each of a range of price bands (pence per unit (ppu) of alcohol) was also provided for 2008-2010 for all main drink categories. This provided a price band profile for the volume of pure alcohol sold in each drinks category, allowing those drinks categories currently sold at relatively lower prices to be clearly identified.

### Results

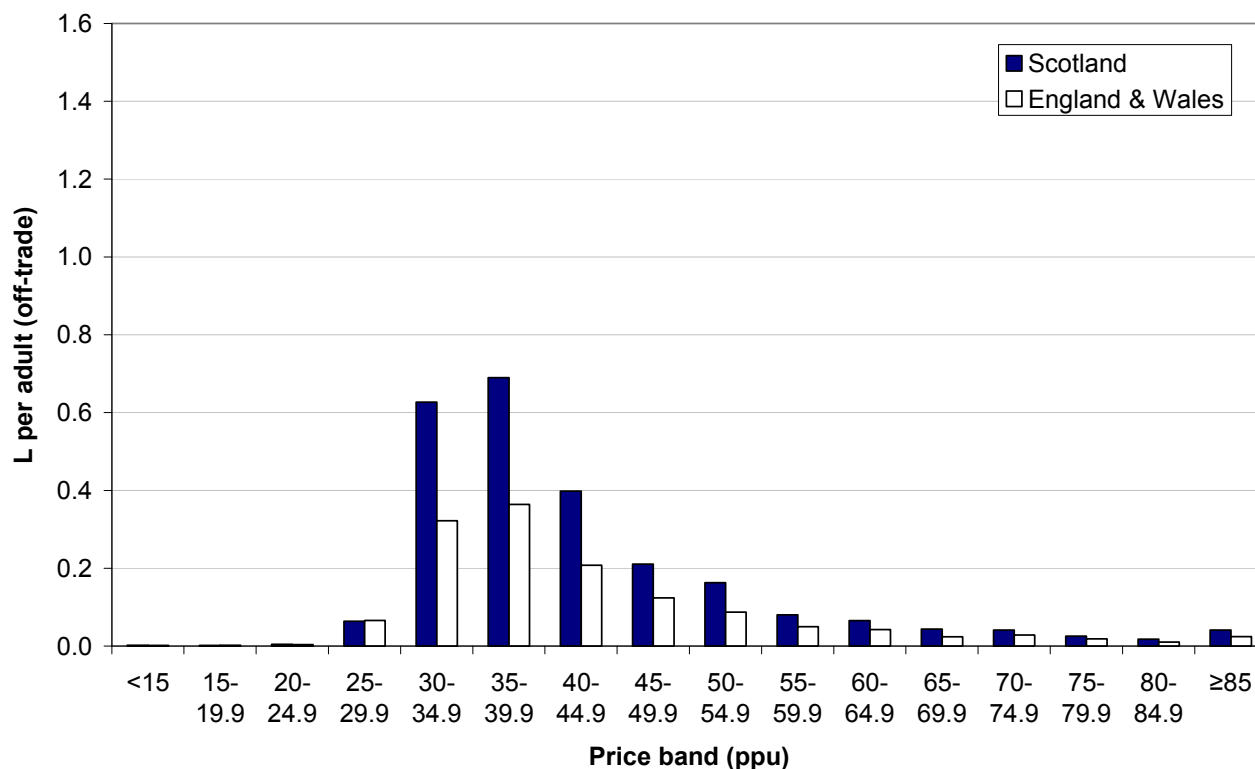
- Retail sales data indicate that in 2010, 11.8L of pure alcohol were sold per adult in Scotland (22.8 units per adult per week) compared with 10.7L in 1994, an increase of 11%. Most of this increase occurred between 1994 and 2005, with a broadly stable trend thereafter.
- In England & Wales, per adult sales increased from 9.6L in 1994 to a peak of 10.5L in 2005, decreasing slightly each year thereafter to 9.6L in 2010 (18.5 units per adult per week).
- In Scotland, on-trade sales of pure alcohol decreased by 28% from 5.5L in 1994 to 3.9L in 2010, whereas off-trade sales increased by 52% over the same time period, from 5.2L in 1994 to 7.9L in 2010. It is estimated that about two-thirds (67%) of all pure alcohol sold in Scotland in 2010 was sold through the off-trade.
- The decline in on-trade sales of pure alcohol per adult in Scotland between 1994 and 2010 was driven by a 35% decline in on-trade beer sales (from 3.2L to 2.1L); the upward trend in off-trade sales per adult was driven by a more than twofold increase in off-trade wine sales (from 1.0L to 2.6L).
- In 2010:
  - An additional 2.2L of pure alcohol were sold per adult in Scotland (11.8L) compared to England & Wales (9.6L); per adult sales in Scotland were therefore over a fifth higher (23%), the widest gap observed over the period analysed.
  - Most of this difference was due to 1.6L higher off-trade sales in Scotland than in England & Wales.
  - 1.1L of the off-trade difference was due to higher per adult sales of spirits in Scotland.
  - Vodka explained 38% of the difference in off-trade sales; per adult sales of vodka through the off-trade in Scotland were almost 2.5 times higher than in England & Wales.
  - The average price of a unit of alcohol sold through the off-trade in Scotland was 45ppu, and 134ppu through the on-trade.
- Over the three years 2008-2010, the proportion of off-trade alcohol sold in the lower price bands diminished, with the biggest decline in the cheapest price bands. In 2008, 57% of off-trade alcohol was sold at less than 40ppu, 81% at less than 50ppu and 91% at less than 60ppu. By 2010 this had declined to 45% of off-trade alcohol sold at less than 40ppu, 73% at less than 50ppu and 87% at less than 60ppu.
- Higher off-trade sales were common across the entire price distribution in Scotland and across most drink types. However, this was particularly marked in the 30-44.9ppu range and for spirits, especially vodka.

This briefing is a summary of the full report, which is a web-only publication. The report and accompanying datasets are available to download from [www.healthscotland.com/scotlands-health/evaluation/planning/MESAS.aspx](http://www.healthscotland.com/scotlands-health/evaluation/planning/MESAS.aspx)

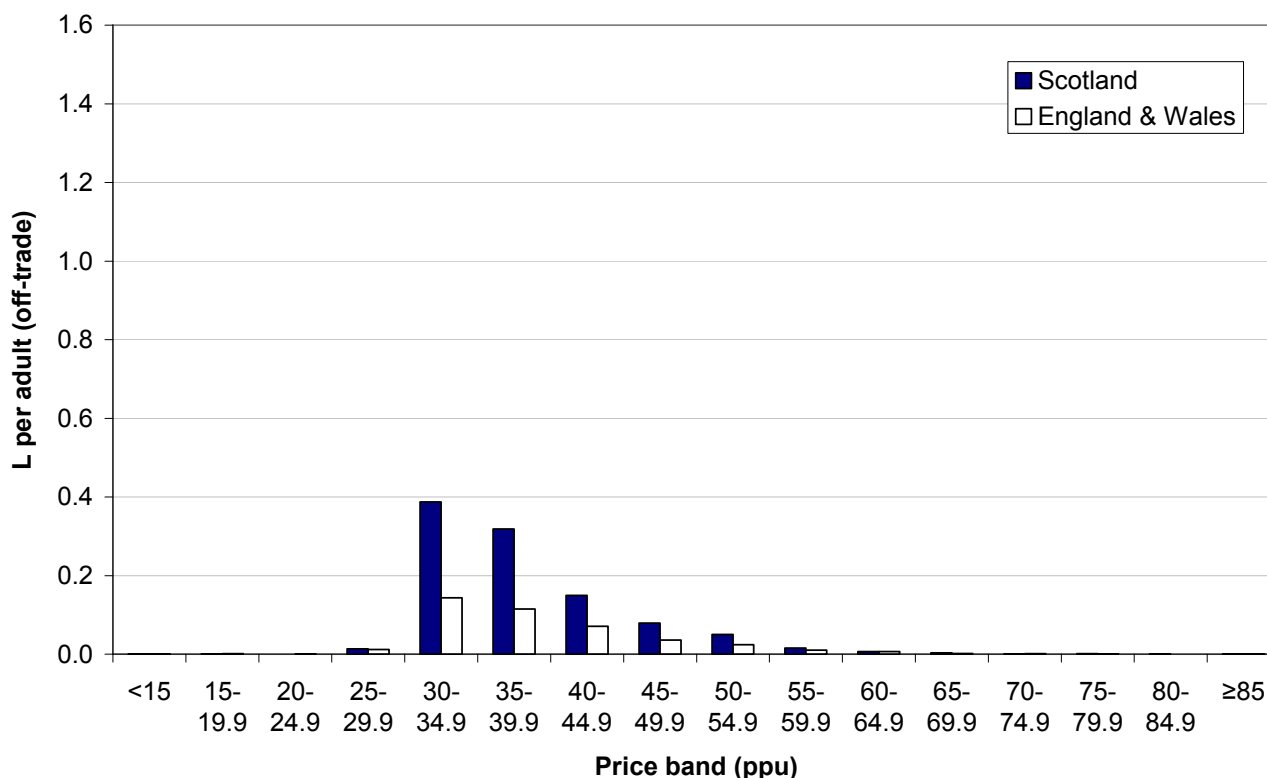
**Figure 1: Litres of pure alcohol sold per adult (aged ≥16) in Scotland and England & Wales, 1994-2010****Figure 2: Litres of pure alcohol sold per adult (aged ≥16) in Scotland and England & Wales, by market sector, 1994-2010****Figure 3: Litres of pure alcohol sold per adult (aged ≥16) in Scotland and England & Wales, by drink type, 1994-2010**

**Figure 4: Price distribution (%) of pure alcohol sold off-trade in Scotland, 2008-2010****Figure 5: Price distribution (L per adult aged ≥16) of pure alcohol sold off-trade in Scotland and England & Wales, 2010**

**Figure 6: Price distribution (L per adult aged  $\geq 16$ ) of pure alcohol sold off-trade as spirits in Scotland and England & Wales, 2010**



**Figure 7: Price distribution (L per capita aged  $\geq 16$ ) of pure alcohol sold off-trade as vodka in Scotland and England & Wales, 2010**



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