



THE FOUR STEPS TO ALCOHOL MISUSE

How the industry uses price, place, promotion and product design to persuade us that too much alcohol is not enough

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Foreword: Beware the alcohol fire-raisers

It's all down to British culture, we are told. We have always drunk to excess; after all there are references to bingeing in Beowulf, Shakespeare and Burns. All this is seemingly driven by a combination of the long winter nights, a lack of sunshine and a penchant for hedonism. So there we are, it's all inevitable - don't, whatever you do, blame the alcopops.

But this is like saying paper is naturally flammable, so you can't blame the forest fire on the person who struck the match. But we do. Fire-raising is a serious offence and multiple measures are taken both to prevent it happening and punish perpetrators. Indeed, the fact that a particular substance is hazardous increases rather than reduces the responsibility of those who are involved in its production and distribution. We all need to take care with matches.

In the case of young people's drinking the potential fire-raisers don't wield matches, but massive marketing budgets. These are deployed in four key areas:

- i. Promotion We used to refer to this as advertising, but it actually comes in multiple guises including TV ads, billboards, cinema ads, shop front liveries, merchandising, sponsorship, and branded clothing. Every possible channel of communication you can think of is pressed into service – to the tune of over £800 million a year. These real world appeals are now being matched if not overtaken (as last year's Health Select Committee enquiry suggests) by digital communications. The result for UK young people is an environment suffused with pro-alcohol messages. It is no surprise that our recent Medical Research Council funded study showed that 95% of 13 year olds are aware of alcohol ads and have, on average, come across them in more than five different channels.
- ii. Place Distribution is key for fast moving consumer goods, especially non-essentials like alcohol. In many ways our consumption behaviour echoes Mallory's reason for climbing Everest – we do it because it is there. So for alcohol companies ubiquity is all and has been achieved through extended opening hours and a proliferation of on and off trade outlets.
- iii. Price We often discuss price in a macro-economic sense, but it is also a key marketing tool. Special offers such as happy hours, multi-packs, loss leaders and end of aisle promotions all help to make alcohol more affordable and accessible.
- iv. Product design This is perhaps the most fundamental of marketing tools, and the UK has seen a massive expansion in product options over the last twenty years. These include whole new categories (such as alcopops and shots); exotic flavours (from lemon meringue to toffee) and innovative packaging. One example from my own locale, which appeared just last

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year, is a jaffacake flavoured vodka from a company called Stiffy. As the blurb says *“it captures the brilliantly fragrant and distinctive flavour of Jaffa Cakes to give the drink a smack of tangy orange and the lip licking after taste of dark chocolate”*.

These four marketing tools are used in careful combination to maximise impact. The result is a world in which young people not only get peppered with pro alcohol ads, but are incentivised to consume at every turn a vast array of products many of which, in themselves, promote ideas of irresponsibility and over-indulgence.

So whilst it is true that alcohol – and its misuse - has long been a part of our culture, marketing is patently exacerbating the situation. It is a hot dry night in the forest and, far from damping down the undergrowth, alcohol marketers persist in striking matches and scattering brushwood.

Professor Gerard Hastings

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September 2011

Introduction

This is the first time that agencies tasked with reducing alcohol harm have united across regional and national boundaries to highlight the easy availability of alcohol in parts of the UK where it is doing the most damage.

Produced by Alcohol Focus Scotland; Scottish Health Action on Alcohol Problems (SHAAP); Balance, the North East Alcohol Office; and Our Life this report also shows that super-low prices are just one of the industry's 'tricks of the trade' to get people to buy ever more alcohol.

When it comes to encouraging shoppers to part with their money, marketing experts talk about the 'four Ps' of **promotion, place, price** and **product design**, which all play their part in persuading people to make a purchase.

This report investigates the role of promotion, place, price and product design in encouraging alcohol misuse. Price data was collected from leading supermarkets in Scotland and the north of England in February and October 2011.

Based upon our findings, we have recommended a number of actions that need to be taken if Britain is serious about reducing high levels of alcohol consumption and the problems we face because of it.

Why we produced this report

Alcohol consumption across all countries of the UK has gone up significantly over the last 60 years. So much so, that the average intake of alcohol per person in the UK has risen steadily from five litres in the 1950s to 10.7 litres in 2008/9.¹

In Scotland, sales data show that the amount of alcohol consumed by the population in 2010 was 11.8 litres of pure alcohol per adult,² and two thirds of this alcohol was bought from off-licensed stores, mainly large supermarkets.

This is of particular concern as evidence shows that the higher the alcohol consumption level of a country, the greater the harm inflicted on that society and its people.³

Whether it's drinking to get drunk or consuming above recommended limits on a daily or almost daily basis, consumption is causing major problems for Scotland and northern England.

In Scotland, 44% of men and 34% of women admit to drinking more than the recommended guidelines on at least one day in the past week.⁴ In England the figures are 37% and 29% respectively.⁵ This level of risky alcohol consumption is causing us major problems in terms of our health:

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- The World Health Organisation has stated that alcohol causes more deaths worldwide than HIV/AIDS, violence or tuberculosis.⁶
- Alcohol is also the second biggest cause of cancer (in people over 35) after smoking.⁷
- In the UK 27% of young male and 15% of young female deaths were caused by alcohol.⁸
- In Scotland, alcohol kills three people every day and results in over 100 hospital admissions.⁹

Alcohol misuse is draining our wealth and putting our safety at risk. It costs Scottish society £3.5bn each year and up to £25.1 billion in the UK as a whole¹⁰ and with 50% of all violent crime alcohol-related.¹¹

Summary of Main Findings

- Alcohol is available for as little as 14p a unit in Scotland.
- Alcohol is available for as little as 12p a unit in the North East of England.
- Alcohol is available for as little as 16p a unit in the North West of England.
- Two cans of lager were sold for less than the price of a can of leading brand cola.
- Branded vodka sold for 32p a unit/shot – less than a can of brand cola.
- A young person receiving the average British pocket money (£5.89) could purchase eight litres of cider containing 33.6 units of alcohol.
- The pricing measure favoured by the Westminster government (banning the sale of alcohol below the cost the duty and VAT) will have little effect on reducing consumption and harm.
- Large supermarkets in Scotland have sought to undermine the effects of new licensing legislation which bans bulk discount buys by reducing the unit price and encouraging online customers to buy cases of wine distributed from England.
- The flavouring and packaging of pre-mixed drinks (alcopops) are specifically designed to appeal to adolescents and encourage first time drinkers into alcohol use.

Price

Alcohol is 44% more affordable today, in relative terms, than it was in 1980¹² and it's no coincidence that average UK consumption has doubled over the last 60 years. In 2010 there was enough alcohol sold in Scotland to enable every man and woman over 16 to exceed recommended guidelines.¹³

Bearing in mind that cost is a significant motivation when it comes to purchasing and consuming alcohol, this report reveals that (at the time our price survey was conducted) alcohol was being sold across Scotland and northern England, for pocket money prices.

Headline findings

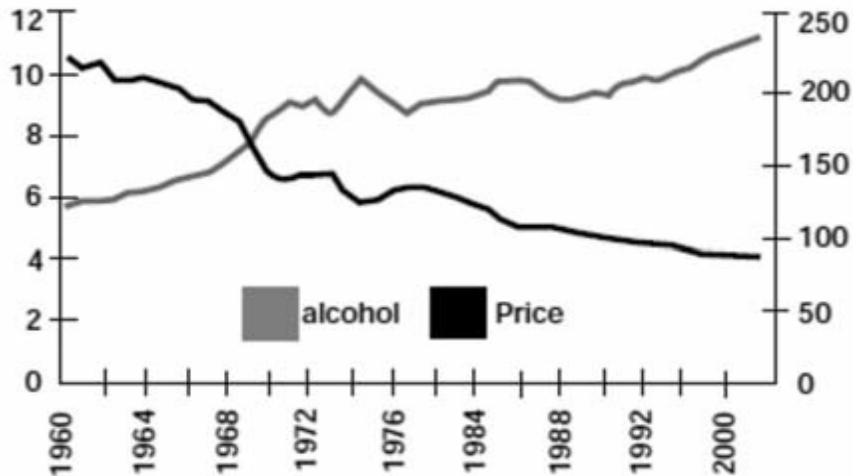
- Alcohol is available for as little as 14p a unit in Scotland. This means:
 - a man can drink at his recommended daily limit for just 56p and weekly limit for just £2.94.
 - a woman can drink at her daily limit for just 42p or weekly limit for £1.96.
- Alcohol is available in the North East of England for as little as 12p a unit. This means:
 - a man can drink at his recommended daily limit (3-4 units) for just 48p and weekly limit (21 units) for just £2.52.
 - a woman can drink at her daily limit (2-3 units) for just 36p (considerably less than the price of a can of leading cola) or weekly limit (14 units) for £1.68.
- Alcohol is available for as little as 16p a unit in the North West of England. This means:
 - a man can drink at his recommended daily limit for just 64p and weekly limit for just £3.36.
 - a woman can drink at her daily limit for just 48p (less than the price of a can of leading cola) or weekly limit for £2.24.
- A 440ml can of own brand lager sold for 23p.
- Two cans of lager sold for less than the price of a can of leading brand cola.
- A four-pack of own brand lager, containing the daily recommended limit for a man, sold for less than £1.
- A 70cl bottle of vodka containing 26 units of alcohol (more than the recommended weekly limit for a man) sold for as little as £8.47.
- Branded vodka sold for 32p a unit/shot – less than a can of brand cola.
- A can of leading brand lager sold for less than £1.
- At these prices and armed with the average British pocket money of £5.89, a young person could purchase eight litres of cider, containing 33.6 units – enough alcohol to kill them.

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Reducing consumption

Research shows that any effective approach to reducing consumption needs to include measures that decrease the affordability of alcohol – as well as reducing its availability and restricting its promotion.

Numerous econometric studies reveal that as the price of alcohol goes down, consumption of alcohol goes up – as demonstrated in the table below.



Source: *Calling Time*, the Academy of Medical Sciences

The Westminster government acknowledges this to be the case. However, in proposing to ban the sale of alcohol below duty plus VAT the Westminster government has failed to back an effective, evidence based pricing measure to deal with the problems we face at the hands of alcohol sold at pocket money prices.

Banning the sale of alcohol below the cost of duty plus VAT is not enough

Our report shows that the measure favoured by the Westminster government will have little, if any, impact on reducing alcohol consumption and the problems created by its misuse in Britain. If implemented, the measure would increase the price of just two out of more than 600 alcohol products which were investigated as part of this report.

Speaking about the proposed ban earlier this year, Home Office minister James Brokenshire told the Guardian newspaper:

“Banning the sale of alcohol below the rate of duty plus VAT is the best starting point for tackling the availability of cheap alcohol and will send a clear signal to retailers and the public that Government take this issue seriously. They will effectively set a minimum price level below which alcoholic products cannot be

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sold and will stop the worst instances of deep discounting, which result in alcohol being sold both cheaply and harmfully.”

However, an investigation carried out by the Guardian newspaper following the government’s announcement found that only one product out of thousands surveyed would be affected.¹⁴ In fact, as our findings illustrate in the table below, not only would this measure fail to have any impact on some of the cheapest alcohol products available, it would allow most of them to be sold at an even cheaper price.

Selected alcohol products from major supermarket	Current Price (as of 12.10.2011)	Min Price 45p	Ban on sale below cost of duty + VAT
White cider 2l, 7.5% 15 units	£2.99 or 19p/unit	£6.75	86p or 6p/unit
Branded cider 2l, 5.3%, 10.6 units	£3.23 or 30p/unit	£4.77	86p or 8p/unit
Own-brand lager, 4% 4x440ml 7 units	£2.71 or 39p/unit	£3.15	£1.57 or 22p/unit
Branded vodka, 1l, 37.5%, 37.5 units	£12 or 32p/unit (On offer. Normal price £16.07)	£16.88	£11.48 or 31p/unit
Value vodka 70cl, 37.5% 26 units	£8.72 or 33p/unit	£11.70	£8.77 or 34p/unit
Cheapest wine available 12.5%, 9.3 units	£2.99 or 32p/unit	£4.19	£.2.17 or 23p/unit

If it can be seen from the outset that the proposed ban on the sale of alcohol below duty and VAT will have little if any impact, it begs the question of why it has been considered in the first place.

Commenting in the Guardian in February, Diane Abbot, shadow public health minister, said: “The government’s actions on minimum alcohol prices have been completely phoney. They must have realised that the minimum price they were suggesting would have hardly any effect. Obviously the drinks industry must have been glad that the Government appears to be taking action on pricing, but in practice is doing nothing. This just shows how when it comes to public health, Andrew Lansley puts the interests of big business first.”

Minimum Pricing Introduced in Scotland

In contrast to a ban on the sale of alcohol below duty and VAT, research shows that the introduction of a minimum price of 40 pence per unit of alcohol or more will be an effective means of tackling alcohol-related problems. Increasing the price of the cheapest alcohol will have the greatest impact on the heaviest

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drinkers, while having a minimal impact on moderate drinkers. Research shows that a minimum price of 45p per unit of alcohol for example would reduce the consumption of harmful drinkers in Scotland by 7.9%, leading to 2,000 fewer hospital admissions and 1,600 hospital admissions per year.¹⁵

In Scotland, the Scottish Government has announced its intention to introduce legislation to establish a minimum unit price for alcohol and the measure could become law within a year. Scottish First Minister Alex Salmond said:

“I think that we have confused our appetite for fun with a hunger for self-destruction. We tolerate a race to the bottom of the bottle, which ruins our health, our judgement, our relationships, our safety and our dignity.”¹⁶

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Place

Alcohol can be purchased 24 hours a day, seven days a week, every single day of the year.

More than 7,800 premises across the UK sell alcohol 24 hours of the day, seven days a week.¹⁷ Only 946 of these premises, which also include takeaways and petrol stations, are pubs, bars and nightclubs.

Research published earlier this year by Alcohol Concern shows a statistically significant link between the density of off-licences and alcohol specific hospital admissions in people under 18-years-old. The *One on Every Corner* report reveals that almost one in 10 of all alcohol specific hospital admissions in England, excluding London, are directly attributable to off-licence density.¹⁸

Internet shopping and 'dial-a-drink' services mean you don't even need to leave home to purchase alcohol.

Unlike tobacco, which is sold in a separate area of a supermarket, alcohol is available from a number of normal food and drink aisles, as well as being dotted elsewhere throughout the store.

Our research shows that alcohol promotion begins before you get through the door, with posters on windows and advertising boards promoting alcoholic products on the pavement outside.

Alcohol promotions were routinely placed in the supermarket entrance – often in the form of stacks of boxed beers, lagers and cider.

They are sold alongside associated products which include meat, cheese and DVDs (including children's titles. This raises interesting questions about the message this gives about consuming alcohol in front of children and making alcohol central to family-time. Alcohol is also displayed prominently at the end of aisles at eye level – to maximise exposure and increase the likelihood of impulse purchasing.

The importance of dispersing alcohol displays in order to increase sales has been recognised by the drinks industry. Carlsberg brewers, for example, urge retailers to 'create stacks of your promotional beers' and 'site stacks away from the beer fixture to drive impulse purchase'.¹⁹

A view from the inside

Andrew Glidden, of design consultancy Glidden, said: "One such way of driving a sale through encouraging an impulse buy is through 'product adjacencies', which is the practice of cross promoting products that fit together. This establishes a need in the consumer for an additional product, which they had no intention of purchasing at the outset."

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Andrew confided that other 'tricks of the trade' included using lighting, lowered ceilings, products at eye-level and floor graphics to make sure people spot the product and put them in the right frame of mind to make a purchase.

Another well used technique is stacking products – sometimes even partially stacking stock to make it look like there has been increased demand.

He said: "Stacked products create the feeling that if you don't buy now, they'll run out. Sometimes retailers will set out half stacked pallets to increase that feeling. They will also move displays around the store and limit deals to certain days to further ramp up that feeling that deals are fleeting and you must purchase immediately."²⁰

A different situation in Scotland

The activities described above reinforce the necessity of new licensing legislation recently introduced in Scotland which requires that displays of alcohol must be confined to a single area of the store. This is in response to a growing concern that alcohol displays on the ends of aisles, directly inside the shop doorway and next to everyday groceries, encourages consumers to think of alcohol as an ordinary commodity, rather than a potentially harmful drug. Once again, progress in Scotland points the way forward for the Westminster government.

Promotion

In the UK, expenditure by the alcohol industry on marketing and promotion is substantial and significantly more than expenditure on health promotion marketing and advertising specific to alcohol.

Andrew Glidden explained: "There's a large amount of psychology involved in retailing products to the public. Supermarkets make sure that the shopping experience they provide isn't monotonous, delivering peaks and troughs. Special offers, such as discounted alcohol, certainly fit into the peaks category and aim to increase impulse buying.

"Promotions give people the impression that they're getting a bargain. Retailers manipulate the consumer, often driving their behaviour through special offers which trigger a purchase."

But is it a genuine bargain?

It's important to note that people are only getting the 'impression' that they are getting a bargain.

Research suggests that shoppers are in fact paying more for non-alcohol products as a direct result of supermarkets discounting alcohol as a 'loss-leader' to encourage more people into stores. A paper, published by Newcastle University investigating the impact of the introduction of a minimum price per unit of alcohol of 50p, suggests that if alcohol prices rise the price of non-alcoholic products may decrease. This is because big supermarkets subsidise the sale of cheap alcohol by increasing the profit margins on other goods they sell. If supermarkets are prevented from loss-leading on cheap alcohol by fixing a minimum price, cross-subsidising will no longer be necessary. This may then lead to a reduction in prices of non-alcoholic products making 70% of the population better off.²¹

Restriction on price promotions in Scotland

In response to concerns about irresponsible promotions by off-sales retailers, a new law came into force in Scotland on 1st October 2011 banning shops and supermarkets from using quantity discounts to encourage consumers to buy alcohol in bulk. Offers such as buy-one-get-one-free, or three bottles of wine for £10 are no longer allowed.

However, some big supermarkets, despite claiming to be 'responsible' retailers, have sought to undermine the spirit and the effect of the new legislation. Instead of promotions such as three bottles of wine for £10, supermarket ASDA is now offering row upon row of discounted wine products at £3.33 a bottle. Majestic Wine informed Scottish customers on its website that wherever a multi-buy price was offered in England and Wales, this would be the single-bottle price charged in Scotland.²²

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In an email to its Scottish internet customers Tesco highlighted that they could still benefit from multi-buy offers because any online orders would be dispatched from England: "Great news! All orders place at TescoWine by the case will still qualify for these discounts when applicable as your wine is dispatched to you from our distribution centre in Daventry, England."²³

Online sales of alcohol represent a small fraction of the total amount of alcohol purchased in Scotland. However, the tactics by big retailers to get around the ban on quantity discounts demonstrates why setting a minimum price per unit of alcohol is necessary to stop the sale of cheap alcohol. The antics of the large retailers also exposes the ineffectiveness of 'social responsibility' measures which rely on alcohol producers and retailers to act responsibly. The recent behaviour of the big supermarkets who have sought to undermine new licensing laws in Scotland suggests that they will continue to prioritise volume sales and profit margins even when this is at the expense of the nation's health and well-being.

Promotion and young people

Young people are thought to be particularly susceptible to the marketing of alcoholic products.

- The alcohol industry spends £800m a year on marketing – which leads young people to start drinking earlier and to consume more.²⁴
- Millions of children, some as young as four-years-old, were exposed to alcohol adverts during last year's World Cup.²⁵
- Movie exposure and having a television in the bedroom are both independent predictors of onset of problematic alcohol use.²⁶

As part of its 2009 investigation into the conduct of the UK alcohol industry, the House of Commons Health Select Committee obtained access to internal marketing documents from alcohol producers and their advertising agencies.

This investigation revealed that young people are a key target for alcohol advertisers, despite a self regulatory code which purports to protect young people from alcohol advertising.

Industry market research data which the Health Select Committee examined as part of their investigation referred to Lambrini as a 'kids drink' and made reference to the need to recruit new drinkers and establish their loyalty to a product. Brand strategy documents also abounded with references to 'getting pissed', 'blasted' and 'things getting messy'.²⁷

Online promotion

The internet plays a particularly prominent role in promoting alcohol. In 2007, the alcohol industry increased its marketing spend on the internet by 70%.²⁸

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This has worrying implications for children and young people when you consider the growing presence of alcohol companies on social networking sites (SNS) such as Facebook and Twitter.

In September, Diageo struck a multi-billion dollar deal with Facebook, which health experts say will fuel an under-age drinking epidemic by exposing increasing numbers of young people to alcohol marketing.

The deal makes Smirnoff, according to its producer Diageo, 'the number one beverage alcohol brand on Facebook worldwide'. Diageo say that Facebook activity in the US has increased sales by 20%. This activity is only set to increase, as the company boasts of training 950 marketers to build social media capabilities to generate 'significant returns on investment'.²⁹

We wonder exactly who will be generating these significant returns on investment. After all, sites such as Facebook are used by a huge number of children and young people on a regular basis. Research from Ofcom has shown that almost half (49%) of children aged between 8 and 17 years old who use the internet have set up their own profile on a social networking site.³⁰

Although Facebook argues that pages set up by alcohol advertisers are 'age-gated' and only accessible to those over 18, these 'age-gates' are far from infallible and can be bypassed simply by inputting a fake birth-date.

Perhaps most worrying is that Facebook accounts are hidden from parents, providing organisations such as Diageo with a direct and uncensored communications channel to children and young people – promoting drinking as a positive lifestyle choice.

Research shows that alcohol advertising encourages young people to drink earlier and to drink more.³¹

Importantly, children and young people are not just at the mercy of 'official' marketing. Fans of alcohol products are increasingly becoming brand advocates by setting up fan pages and passing alcohol adverts between themselves – further normalizing consumption and increasing pressure on young people to drink and drink more.

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Product design

Product packaging has a huge influence on grabbing attention and encouraging a purchase.

Research shows that exposure to product packaging is associated with increased intentions to drink and is predictive of early onset of alcohol consumption.³²

The size of a product and the colours, language and images used to package it are crucial when communicating the brand personality of individual alcohol products so that target audiences identify with and purchase them. Research suggests that this is in fact the most effective means of attracting attention.³³

The power of packaging was demonstrated earlier this year by America's reaction to a 5% alcopop called 'Blast'. Critics highlighted that its bold, colorful packaging made it look more like 'soda pop' than an adult beverage.

A study carried out in Australia supports concerns that some ready to drink alcoholic product packaging, specifically the Bacardi Breezer (and the similarly appealing Mudshake), are marketed with packaging that appeals to adolescents.

It showed that those under 18 years considered the Breezer to be designed to appeal to their age group. The study, which involved disguising packaging, demonstrated that when packaging was revealed, palatability ratings increased disproportionately for adolescents in comparison to adults²⁴.

When conducting our survey, the similarities between the packaging of alcopops and other soft drinks were hard to ignore. So much so, that if you disguised the labels, you would have difficulty telling them apart.

They are also packaged to be small and portable – making illicit consumption by young people easy. Nowhere is this more evident than in the trend for pre-mixed alcoholic drinks sold in foil packages, similar in appearance to the soft drinks designed to fit inside a packed-lunch box. These are widely available at supermarkets.

One consumer, writing a review on Yahoo! Answers explained: 'the ones (supermarkets) near me sell the test tube shots and also something that i think are called portashots. theyre little packets of rum or vodka, not bottles, so theyre really easy to sneak into sporting events, amusment parks, concerts etc'

Youthful tastes

It's not only the packaging. The seemingly limitless variety of alcopop flavours including cherry-berry, watermelon, iron brew and lemonade are clearly designed to appeal to a younger, less mature palette. This is alcohol for those

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who want the buzz, but without the alcohol taste. In essence – these are drinks tailor made to 'ween' younger people and first time drinkers onto alcohol.

Returning to Blast, this drink is available in blueberry pomegranate and strawberry watermelon – flavours which clearly mask the alcohol taste and wouldn't be out of place as flavours in a sweetshop.

The lure of strong, fruit based flavours that mask the taste of alcohol have long been highlighted as a problem. The Home Office, in a statement on alcopops, said: 'Many are a particular danger because their strength is masked by fruit or other flavours. This breaks down both awareness of the alcohol content and children's traditional taste threshold'.³⁴

Strong, fruity flavours which mask the flavour of alcohol are seen as a strong selling point for the fans of alcopops. The myriad reviews on the internet routinely focus on the fact that you can get drunk, without tasting the alcohol.

Here are a couple of reviews from the Online Review Centre, posted this year, extolling the virtues of leading alcopop brand WKD.

'I don't like drinking strong alcohol and I do want to get drunk I drunk 2 bottles of WKD Iron Bru and I was drunk or tipsy it was great and so cheap.'

'Great drink. Goes down easy. You swear there is no alcohol in it. Best served cold however, if it's warm it can get you very messed up. None the less, great drink and very cheaps'

It's no surprise that a secondary benefit of the drink and motivating factor for purchasing it is its affordability.

It's clear that, although the alcohol industry deny this is its intention, alcopops have successfully targeted young people.

According to a story published in The Mirror newspaper in 2005, the alcopop trade was worth an annual £1,260million in 2005 with 280 million litres being consumed - a 180% rise since 1999.

The figures were published as part of a story about a ten-year-old child being the youngest person ever to be treated for alcoholism after becoming addicted to alcopops.

Commenting in The Mirror, David McNeill, the former Director of the Institute of Alcohol Studies, said: "This child has grown up in a world promoting alcopops. Now we're reaping what's been sown. The industry has behaved irresponsibly in the production of alcopops. It has been predatory."

6. Recommendations

This report demonstrates that alcohol is too affordable, too available and too widely promoted and is threatening the health, wealth and safety of people of all ages across Scotland and the north of England.

Although we acknowledge the importance of personal responsibility - it is obvious that this is not enough on its own to change drinking behaviour. Particularly when people are bombarded by marketing communications and promotions suggesting that drinking is socially desirable and attractive. Urging individual restraint in a commercial environment that promotes access as well as excess will not work to reduce alcohol harm.

Governments across the UK need take control of the situation and support people to make positive choices about their drinking to improve their lives and the lives of those around them.

In Scotland, the Scottish Government has already taken important steps towards reducing the availability, affordability and visibility of alcohol to tackle record levels of alcohol consumption and harm. We welcome measures to restrict the display of alcohol and materials promoting the sale of alcohol to designated alcohol aisles in supermarkets, as well as the ban on quantity discounts.

Other action that governments in Scotland and the UK should consider:-

- **Introduce a minimum price per unit of alcohol**
We welcome the Scottish Government's intention to introduce legislation on minimum pricing per unit of alcohol in 2011. We urge all opposition parties to demonstrate political leadership and back this measure to improve Scotland's health.
- **Introduce alcohol-only checkouts in large retailers and ban the use of auto-service tills to sell alcohol**
In Britain, over 80 per cent of off-sales alcohol is now bought from big supermarkets who position alcohol as an ordinary grocery item to be purchased as a part of the weekly shop. Alcohol-only checkouts will remind people that it is not. If alcohol misuse is to be successfully tackled in Britain, then the environment in which it is sold needs to reinforce the message that alcohol is not an ordinary commodity.
- **Reduce off-sales licensed hours to 10am to 8pm**
The increase in alcohol consumption in Scotland over the past 15 years has been wholly driven by a rise in off-sales. Research shows that increased licensed hours are linked to increases in alcohol problems. Some research also suggests that even modest restrictions in opening hours can have a positive impact on public health, particularly for vulnerable groups such as young adolescents and dependent drinkers.³⁵

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- **Commission further independent research and evaluation of sales practices** This should cover all aspects of industry marketing, including producers, distributors and retailers, and should be used to inform and strengthen the current regulatory system.
- **Undertake a full audit of the market** This should consider ways to prohibit any products that appeal to young people more than adults.
- **Ban alcohol sponsorship of sporting and cultural events with youth appeal**
The self-regulatory codes specify that alcohol marketing cannot be associated with sporting prowess or youth culture. At the same time, we allow alcohol companies to sponsor premiership football and youth concerts like T in the Park. We need to create a media and cultural environment for children in Scotland and the UK that is alcohol-free.
- **Introduce restrictions on alcohol marketing in the UK including a ban on alcohol promotion on social networking sites** These could be based on the Loi Evin laws in France to protect children from exposure to a massive proliferation of alcohol marketing communications.
- **Move towards ending industry self-regulation of alcohol marketing communications.** Permitting the alcohol and advertising industries to draw up their own codes of conduct for business practices from which they profit financially is a clear conflict of interest. Regulation should be independent of the alcohol and advertising industries to ensure its integrity and effectiveness.

Appendix One

Findings of our price survey

The information in this report was compiled by Alcohol Focus Scotland; SHAAP; Balance, the North East Alcohol Office and Our Life. It is the first time such a coalition has been formed to collectively reveal the dangerously low prices at which alcohol is being sold in those areas that can least afford it.

During February 2011, we visited branches of Asda, Tesco, Morrisons and Sainsbury's as well as discount supermarkets in Scotland, North East and North West England. In Scotland we repeated the exercise in October 2011.

In addition to price information, we also investigated the promotion of alcohol, focusing on the volume and location of activity as well as looking at packaging.

The survey provides a snapshot of the availability and affordability of alcohol in supermarkets across Britain.

Prices of alcohol products in Scotland

Cider

In terms of getting maximum alcohol for minimum price – this report demonstrates that cider, both branded and supermarket's own, is a significant cause for concern. At the time of the survey, cider was available for as little as 14p per unit of alcohol which is why it is no surprise to find that this is a drink of choice for our youngest and heaviest drinkers.

Cider	Price Feb 2011	Per unit	Price Oct 2011	Per unit
White cider, 2L 7.5%, 15 units				
Diamond White	£3.78	25p	-	-
Frosty Jacks	-		£2.99	20p
Scimitar	£1.99	13p	£2.09	14p
Cheapest branded cider 2L				
Hawsridge, 4.2%, 8.4 units	£1.34	16p	£1.48	18p
Strongbow, 5.3%, 10.6 units	£3.18	30p	£3.23	30p

Vodka

Some supermarkets were selling vodka for pennies a shot. At as little as £8.47 for 700ml, our survey shows vodka to be affordable, again making it popular with the youngest and heaviest drinkers. It can be easily mixed with soft drinks to mask the alcohol taste.

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The high percentage of alcohol in vodka and spirits in general make it a riskier product than other types of alcohol. Overdose is much more likely, sometimes with fatal consequences. Drinking spirits is also linked with higher overall alcohol consumption.³⁶ Off-sales spirits, particularly vodka, account for a large part of the extra two litres of pure alcohol consumed per adult in Scotland compared to England and Wales. Vodka is far cheaper to produce and distribute than wine or beer which is why it is important that it is subject to a higher rate of taxation than other alcohol products as well as minimum pricing to ensure that its price relative to other types of alcohol does not fall any lower.

Vodka	Price Feb 2011	Per unit	Price Oct 2011	Per unit
Branded vodka, 1L, 37.5% Smirnoff	Asda £17.97	48p	£13 (on offer, normal price £16)	35p
	Tesco £16	43p	£12 (on offer, normal price £16.07)	32p
Cheapest value vodka, 37.5% Glens, 1L Value own –brand, 70cl	£12.20	33p	£12.97	35p
	£8.47	33p	£8.72	34p

Our survey shows that branded vodka was available at an even cheaper price in October than six months ago and that value vodka has only marginally increased in price. Data from the Office for National Statistics confirm that supermarket led sales have resulted in cheaper prices for spirits (compared to a year ago) in four out of the past five months since alcohol duties increased in March 2011.³⁷ The ability of the big supermarkets to undermine the impact of increased alcohol taxes underlines why minimum pricing, as well as an end to all discounting on alcohol, is necessary to stop supermarkets using alcohol to drive trade to increase their profits.

Lager

Some supermarkets are selling single cans of lager for pennies. It's so cheap that shoppers can pick up two cans for the price of a can of branded cola.

Lager	Price Feb 2011	Per unit	Price Oct 2011	Per unit
Branded, Tennents, 4%	15x440ml can £12	45p	12x440ml can £7	33p
Own brand, 4x440ml, 4%	£2.65	38p	£2.71	39p

The four steps to alcohol misuse

Wine

When sold for its full retail value, a bottle of Jacob's Creek Shiraz, which we tracked for this survey, was often priced above 50p per unit of alcohol. However, it is no secret that wine is often discounted. At the time our survey was conducted in October 2011, one big supermarket store had price promotions on nearly 250 different wine products, with offers as low as £2 a bottle.

Wine	Price Feb 2011	Per unit	Price Oct 2011	Per unit
Jacob's Creek, 75cl Shiraz/Cabernet, 13.5%	£4.99	49p	£5.98	59p
Cheapest wine on offer, 75cl	White, 11% £2.73	33p	White 12.5% £2.99	31p
Lambrini bianco, 7.5% 75cl	£1.59	28p	£1.62	29p
1.5L	£2.97	26p	£2.50 (on offer)	22p

At its promoted price, a bottle of Lambrini was available for less than £3 a bottle or 22p per unit of alcohol. When you think about this fruit flavoured alcoholic drink which is available for pocket money prices, it's no wonder that Lambrini is celebrated by a large proportion of under 18 drinkers.

Appendix Two

Minimum pricing

The aim of a minimum price is to ensure that retailers are unable to sell alcohol below a baseline cost – even when offering price promotions and discounts.

Research from Sheffield University³⁸ found that in Scotland a minimum price of 45p per unit of alcohol would reduce consumption:

- per drinker by 4.3% on average, reducing hospital admissions by 4,200 and criminal offences by 2,600 per year.
- of harmful drinkers by 7.9%, leading to 2,000 fewer hospital admissions and 1,600 fewer criminal offences per year.
- of hazardous drinkers by 3.2%, leading to 1,600 fewer hospital admissions and 700 fewer criminal offences per year.
- of moderate drinkers by 2%, leading to 200 fewer hospital admissions and 100 fewer criminal offences per year.

A study by Aberdeen University Professor Anne Ludbrook has found middle to high-income groups are just as likely to buy off-sales at below 40p a unit as those on the lowest incomes. The study of household and income expenditure revealed the biggest-earning households bought the most off-sales. Only one in three low-income households buy off-sales, compared with two in three in the highest income bracket.³⁹

Poorer populations are however more likely to experience alcohol-related harm. Almost two thirds of all alcohol-related deaths in Scotland in 2009 were amongst the most deprived members of society. The negative consequences of shortened lives, increased morbidity and reduced productivity impact on entire communities meaning that poorer populations as a whole, including many people who don't drink, bear a greater overall burden of alcohol-related harm. The evidence suggests that preventing the sale of cheap alcohol will have the greatest health and social benefits for Scotland's most deprived communities.

Although a minimum price of 45p per unit of alcohol would see moderate drinkers spend just £8 extra per year or 16p a week, it would lead to estimated healthcare savings of £83 million and crime savings of £18 million over ten years.

A minimum price would have the biggest predicted impact on the consumption of harmful drinkers. We know that harmful drinkers tend to choose cheaper alcohol, so if the price of the cheapest alcohol goes up then the consumption of harmful drinkers will fall as they can afford to drink less alcohol. Although anecdotally it is sometimes claimed that harmful drinkers will maintain their level of consumption following a price increase by spending less on other goods such as food, the evidence indicates otherwise.

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