

Monitoring and Evaluating Scotland's Alcohol Strategy (MESAS): Third Annual Report

Executive Summary

December 2013



Background

This report is the third annual report that provides an update on Scotland's alcohol strategy. It includes the evaluation plan, the trends in price and affordability, alcohol sales and consumption, and alcohol-related harm as detailed in the baseline report. New chapters incorporating findings from the evaluation of the Licensing Act and the contribution of the economic downturn to recent falls in alcohol-related harms in Scotland are also included.

Methods

The report draws together findings from a portfolio of studies evaluating Scotland's alcohol strategy. Methodological details for the study findings are provided within the relevant chapters of the report.

Findings

Licensing Act evaluation

- The activities outlined in the Licensing Act were, in the main, perceived to have been implemented as intended. Although compliance with the legislation was thought to be high its overall impact is unknown.
- Licensing Boards found it difficult to define and measure overprovision. Licensing Forums struggled to function effectively; understanding and addressing the public health objective has been challenging for Licensing Boards.
- Unless there has been a breach of legislation, Licensing Boards do not have the ability to withdraw existing licenses and are restricted to refusing new licenses (limiting the ability of Licensing Boards to reduce alcohol availability). Consequently the Licensing Act, as yet, is unlikely to have a large impact on alcohol consumption in Scotland.

Alcohol consumption

- There has been a downward trend in the volume of pure alcohol sold per adult in Scotland since 2009, decreasing by a total of 8% between 2009 and 2012 (Figure 1).
- Per adult sales in Scotland have been 19-21% higher than in England and Wales over the past five years. This is mostly due to higher off-trade sales in Scotland, particularly spirits.
- The downward trend in self-reported weekly alcohol consumption, particularly since 2008, has been driven by young adults (aged 16-24 years) and those characterised as drinking at 'harmful' levels.
- The mean weekly alcohol consumption of harmful drinkers is substantially higher among those living in the most deprived quintile areas in Scotland (based on SIMD or household income) (Figure 2).

Price & Affordability

- The affordability of alcohol has increased substantially since the 1980s, driven by rising disposable incomes. Despite falls between 2007 and 2011 probably due to the economic downturn, affordability remains high compared to the 1990s and early 2000s. Affordability has increased most in the off-trade.

- Sixty per cent of off-trade alcohol sold in Scotland in 2012 was sold at below 50ppu, the initial level proposed by the Scottish Government if the Alcohol (Minimum Pricing) (Scotland) Act 2012 is implemented (Figure 3). This compares with 81% in 2009, highlighting the importance of reviewing regularly the level at which the minimum price for alcohol is set.
- Although the proportions of off-trade alcohol sold at different price bands in 2012 were similar in Scotland and England & Wales, there are large differences in the volume of alcohol sold per adult at different price bands: higher off-trade sales in Scotland were common across almost the entire price distribution but were particularly marked in the 35-54.9ppu range, driven by higher spirits sales in Scotland within this price range, particularly vodka.

Alcohol-related harms

- Although alcohol-related mortality in Scotland has declined in recent years, alcohol-related mortality rates remain higher than they were in the early 1980s and also remain higher than those in England & Wales (Figure 4).
- There have been falls in some indicators of alcohol-related mortality and morbidity. However, this is not consistent across genders, age groups and diagnoses. In particular, the increase in discharge rates for alcohol psychoses over the past thirty years is of concern. It has been driven by increased rates of the clinical diagnosis of alcohol withdrawal, a cluster of symptoms which result from reduction or cessation of alcohol consumption in patients with alcohol dependence.
- Inequalities in alcohol-related-harm in Scotland have changed in recent years. In the last ten years the relative gap in alcohol-related mortality rates between the most and least deprived communities in Scotland has narrowed (Figure 5).

Economic context

- Falls in alcohol-related mortality (Figure 4) pre-dated the falls in alcohol sales in Scotland (Figure 1), which coincided with the start of the economic recession (Figure 6).
- Aggregate measures of economic conditions such as Gross Domestic Product (GDP) disguise changes in economic circumstances in particular socio-economic groups, which appear to have contributed to the pre-recession falls in alcohol-related mortality in Scotland. Incomes in the lowest income decile in Scotland began to fall before the economic downturn and coincided with the start of falls in alcohol-related mortality. Pre-downturn falls in the incomes of the lowest income decile also occurred in England and Wales but mortality did not begin to fall until the start of the downturn.
- Since the early 1990s, Wales and the English regions that are similar economically to Scotland have seen proportionate increases in alcohol-related mortality that are comparable to Scotland and substantially larger than less industrialised regions of England. These similarities also suggest a role for the economic context in driving alcohol-related mortality.
- The recent economic downturn appears to be a partial explanation for recent falls in alcohol-related mortality but the precise causal mechanism remains unclear.

Conclusion

Scotland is experiencing a recent and sustained decline in alcohol-related harm across most measures but still at levels higher than one decade ago and is persistently higher than England & Wales. It is likely that some elements of Scotland's alcohol strategy are contributing to this decline. Falling incomes in the lowest income deciles are also likely to explain part of the decline, although the analysis is not conclusive and other factors are probably also important. Monitoring trends for the purposes of both on-going policy development and evaluation to understand the effects already in place as planned should continue.

Supporting Figures

Figure 1: Litres of pure alcohol sold per adult (aged ≥16 years) in Scotland and England & Wales, 1994-2012

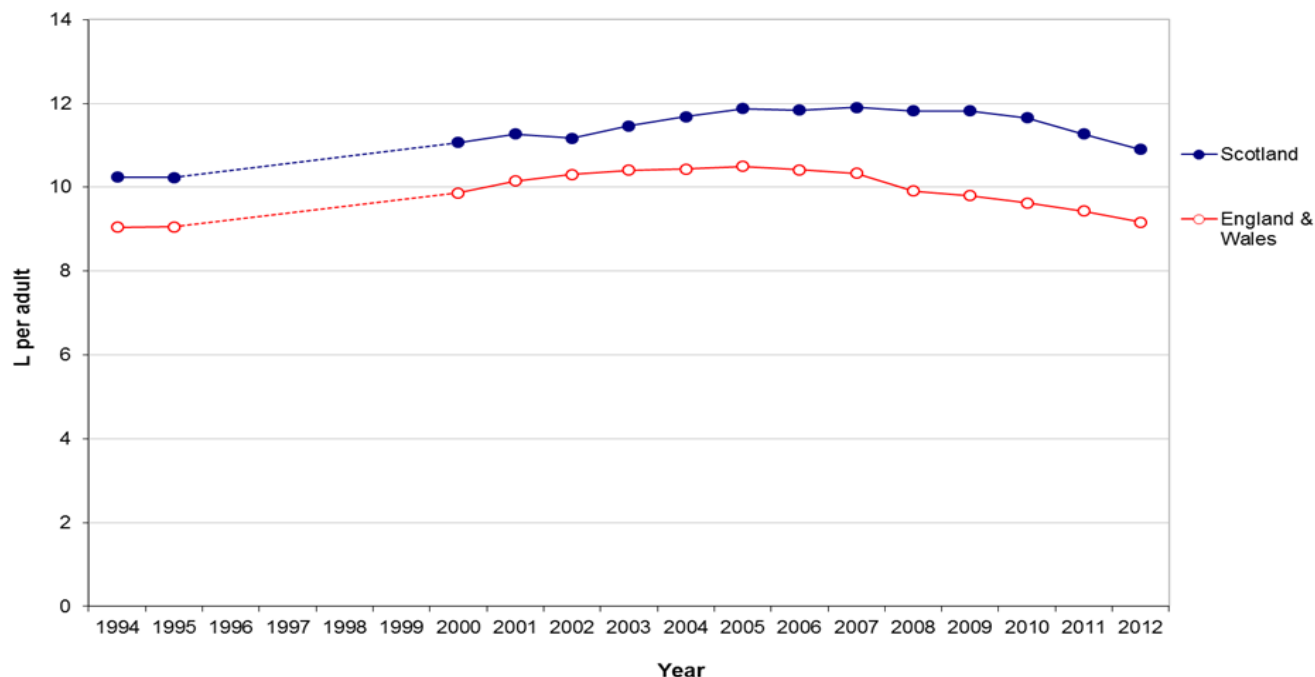
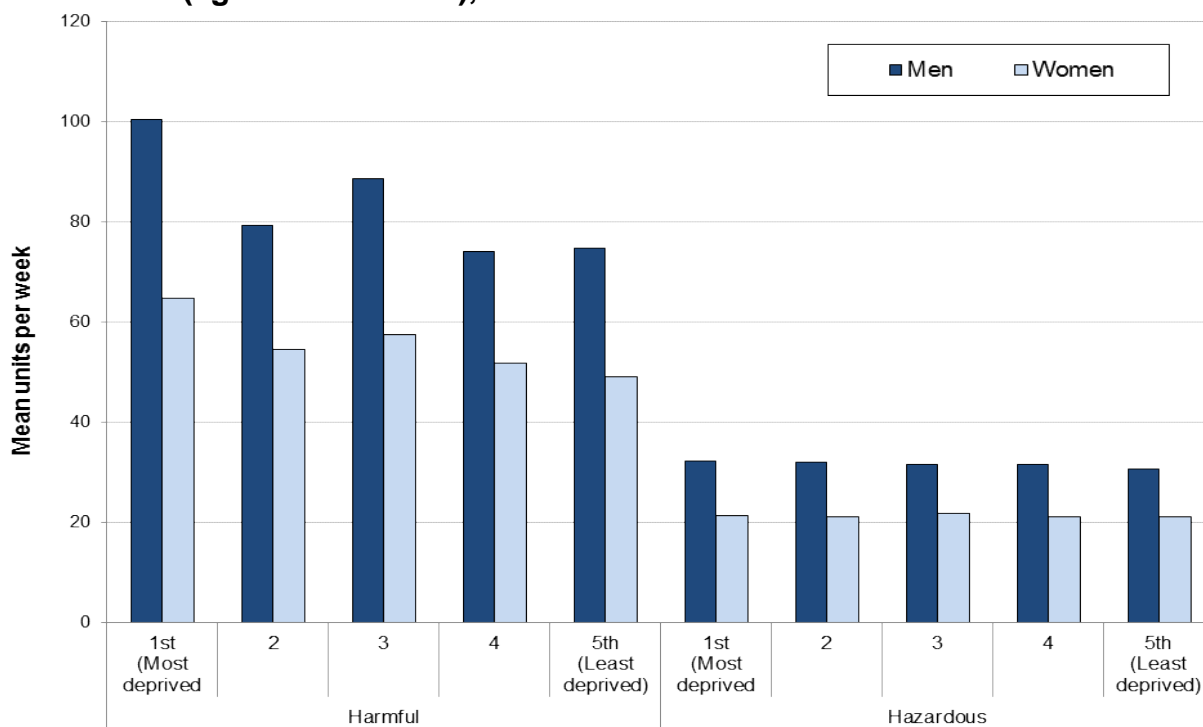


Figure 2: Mean weekly alcohol consumption of men and women in Scotland categorised as hazardous and harmful drinkers*, by SIMD quintile (age-standardised), 2008-2011 combined



Source: Scottish Health Survey. *Hazardous (>21 units and up to 50 units per week for men; >14 units and up to 35 units per week for women); Harmful (men over 50 units per week; women over 35 unit per week).

Figure 3: Price distribution (%) of pure alcohol sold off-trade in Scotland, 2009-2012

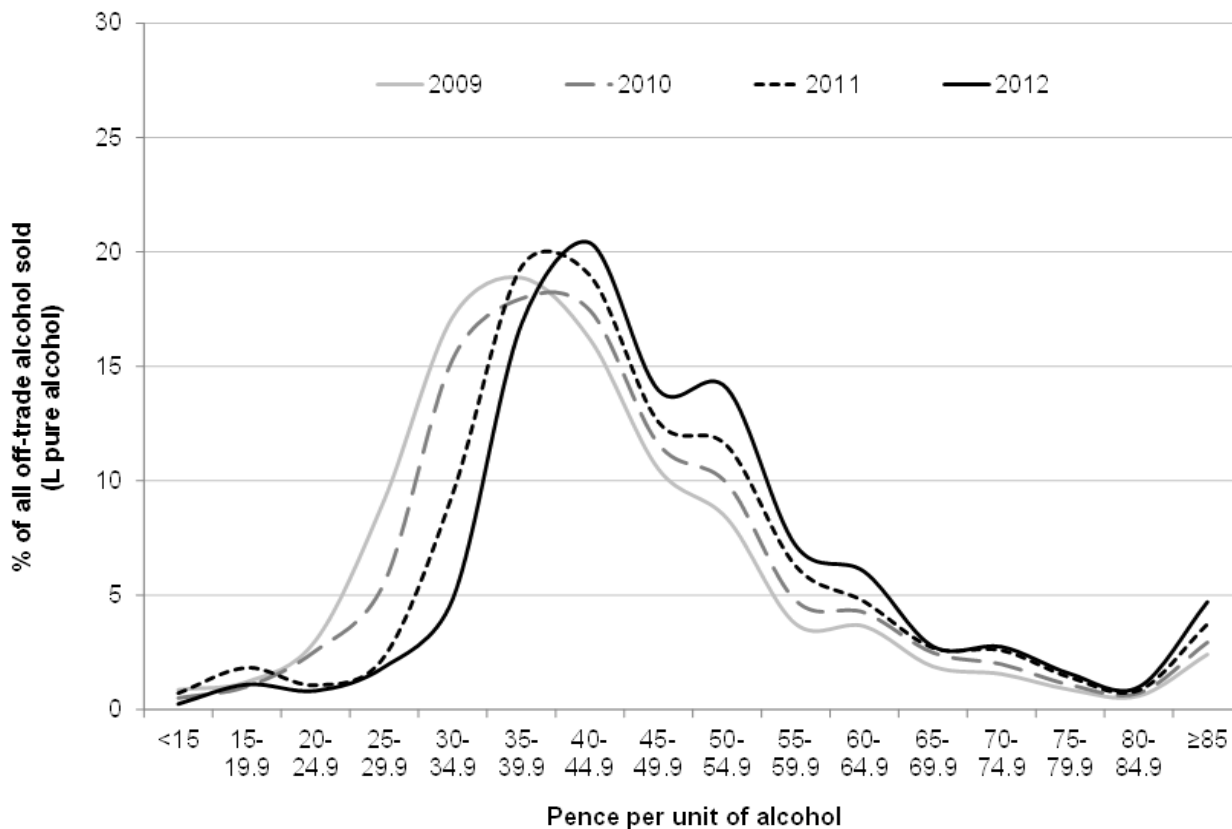


Figure 4: Alcohol-related deaths (underlying cause), Scotland, England & Wales, EASR, by gender, 1991-2011

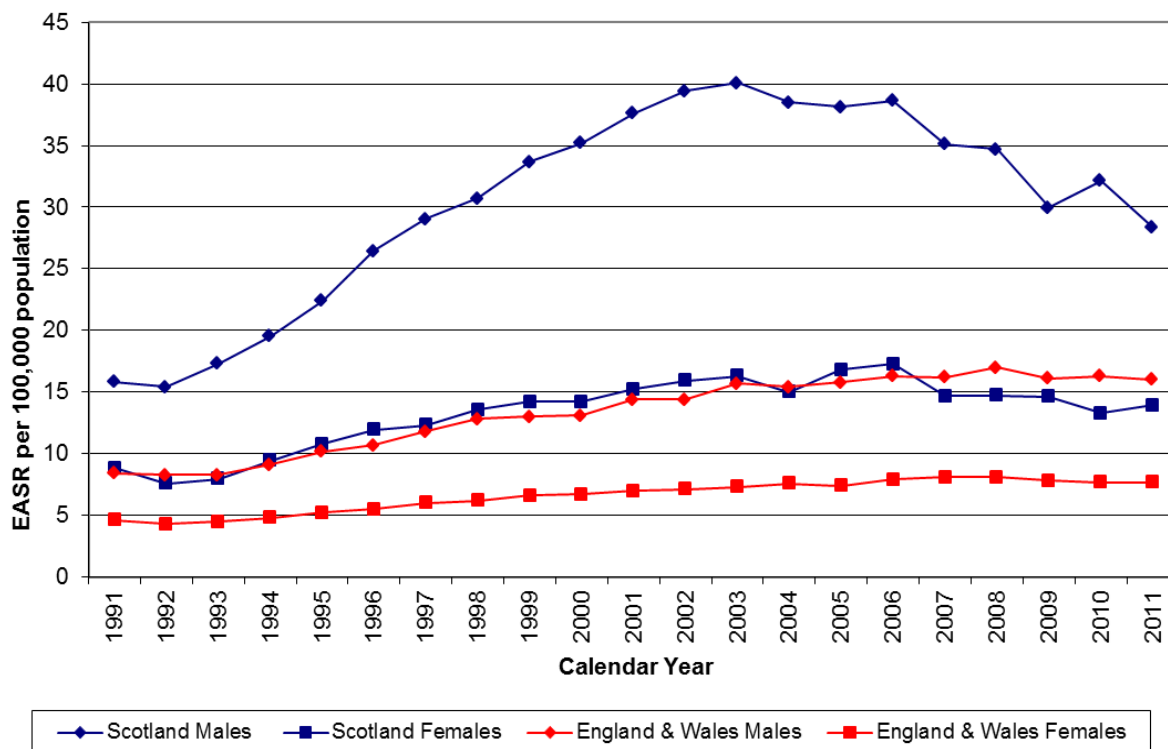


Figure 5: Alcohol-related deaths (underlying cause), by deprivation category, 2007-2011

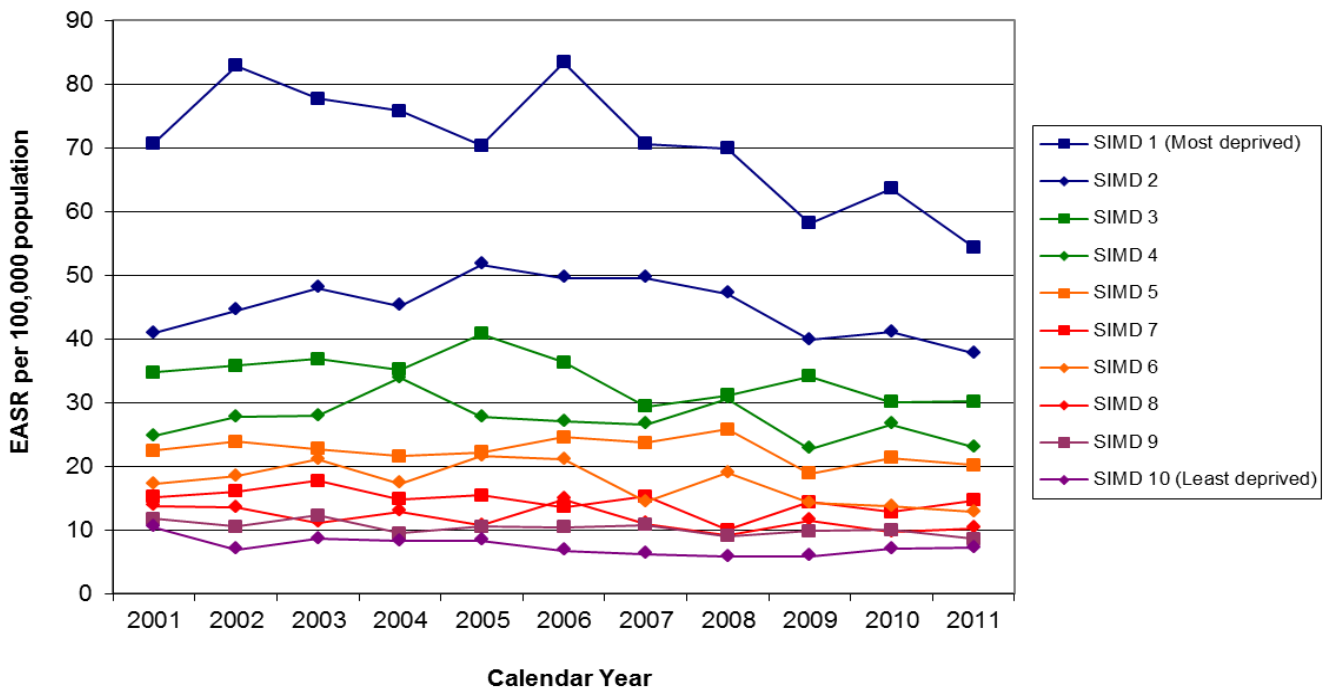


Figure 6: Per capita sales of pure alcohol, per capita Gross Domestic Product and periods of economic downturn. UK, 1970-2012

