

Evaluation and other evidence on the impact of Minimum Unit Pricing

May 2020

Timeline for MUP policy

Date	Event
September 2010	Provisions on minimum pricing removed from the Alcohol etc. (Scotland) Act 2010 due to lack of parliamentary support
24 May 2012	Alcohol (Minimum Pricing) (Scotland) Act is passed unopposed by the Scottish Parliament.
29 June 2012	Alcohol (Minimum Pricing) (Scotland) Act receives Royal Assent.
January 2013	Start of legal action by industry: Scotch Whisky Association (SWA) and other European wine and spirit trade associations seek judicial review of MUP on the basis that it is unlawful.
November 2017	End of legal action by industry: UK Supreme Court rules unanimously that the legislation does not breach EU law, and that minimum pricing is appropriately targeted, lawful and proportionate.
25 April 2018	Scottish Parliament unanimously approves the Alcohol (Minimum Price per Unit) (Scotland) Order 2018, setting the minimum price at 50 pence per unit.
1 May 2018	Implementation of minimum price.
November 2018	The Scottish Government publishes the Alcohol Framework 2018, which includes a commitment to review the minimum unit price following two full years of implementation.
1 May 2020	Scottish Government to review the minimum unit price of alcohol after this date.
April 2023 - April 2024	Scottish Government to report to Scottish Parliament on “the operation of and effect of minimum unit pricing” during the five years of its operation.
30 April 2024	Minimum pricing expires if Scottish Parliament does not approve an order to extend it.



Policy introduced in legislation



Implementation is delayed by 5 years due to legal action by industry



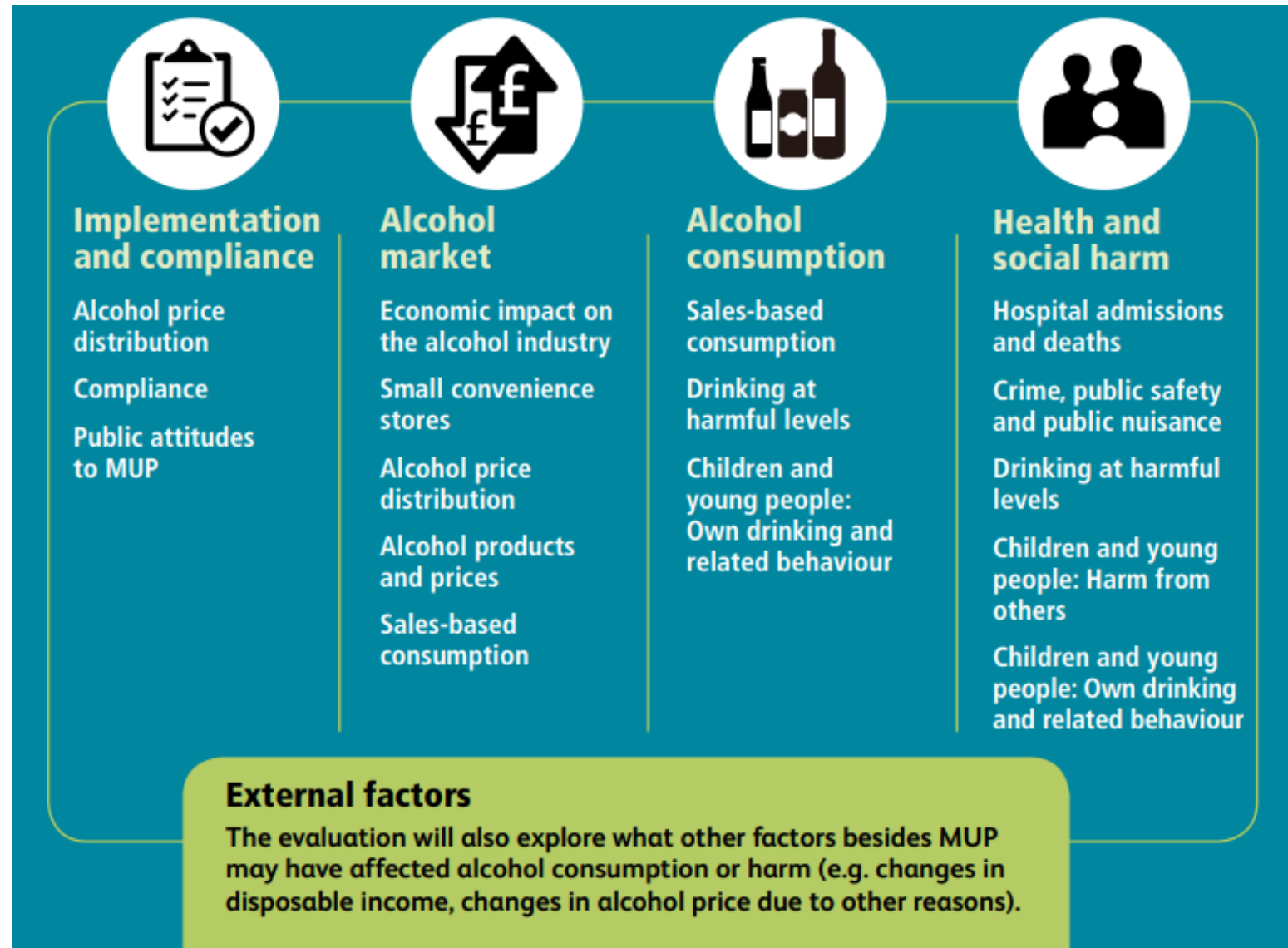
A 50p per unit minimum price is implemented



An evaluation will inform a decision by the parliament after 6 years whether to continue the policy

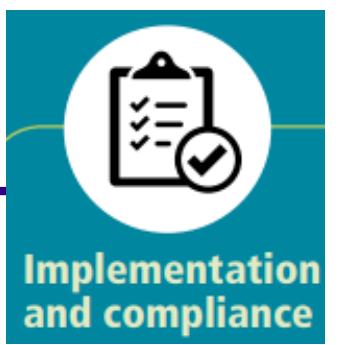
MUP Evaluation

- MUP will be the **most thoroughly evaluated policy** in Scotland's history
- MESAS (Monitoring and Evaluating Scotland's Alcohol Strategy) programme, led by Public Health Scotland, is an extensive set of independent research studies
- These will look at both intended and unintended consequences of MUP
- Final report to be published in late 2023
- The evaluation will gather evidence in **four outcome areas**:



***What the evidence tells us
so far***

Implementation and compliance



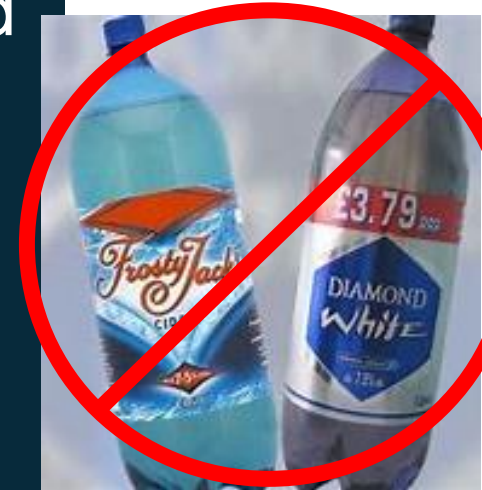
- » Licensed premises largely compliant with MUP
- » On-trade unaffected
- » No increases in illegal activity
- » Some Scottish consumers purchasing alcohol across the border
 - Pre-dated MUP (because of where people work/live, and existing regulatory differences between Scotland and England)
 - For individuals rather than bulk buying
 - No substantial impact on Scottish retailers near the border

[Source: Compliance (licensing) study; Evaluating the impacts on the alcoholic drinks industry in Scotland: baseline evidence and initial impacts]

Alcohol consumption



- » Lowest rate of alcohol consumption for 25 years in 2018
- » 3.6% reduction in off-trade sales in the first year of MUP vs. 3.2% increase in England & Wales
- » 7.6% reduction in weekly alcohol purchases by households in Scotland (mostly from heavier drinking households)
- » How much more alcohol is consumed in Scotland compared to England & Wales has reduced (14% in 2017 to 9% in 2018)
- » Consumers switching to smaller packs, lower-alcohol, and more premium products
- » Delisting of some products (high-strength cider)



[Source: MESAS Monitoring Report 2019; Sales-based consumption: a descriptive analysis of one year post-MUP off-trade alcohol sales data; Immediate impact of MUP on alcohol purchases; Trade press]

Alcohol consumption - young people



- » For children and young people who drank both before and after MUP was implemented, and who were from groups expected to experience issues with alcohol:
 - » Source of alcohol was mostly from the home, friends and family
 - » Lack of money was not considered a barrier to buying alcohol (many of the products favoured by the young people were already sold above 50p per unit before MUP was introduced)
 - » Other factors, particularly influence of friends, parents and carers, had much greater influence on their alcohol use than MUP
- » Increase in young people's drinking (between 2015 and 2018), countering the downward trend since 2004
- » Many indicators still lower than in many previous years

[Source: Minimum Unit Pricing in Scotland: Qualitative study of children and young people's own drinking and related behaviour; Scottish Schools Adolescent Lifestyle and Substance Use Survey (SALSUS) 2018: Alcohol Summary Report]

Alcohol market



- » Little overall impact on retailer revenue
- » Negative but small effects on producer revenues
- » No closed stores, reduced staff numbers or reduced investment
- » There was no significant impact on the on-trade
- » Convenience stores more competitive and benefitting

[Source: Evaluating the impacts on the alcoholic drinks industry in Scotland: baseline evidence and initial impacts; Trade press]

Health and social harm



- » No evaluation studies have been published for this outcome - it is too early to see the impact of the policy on health and social harm at this point
- » Routine data on alcohol-specific death rates and alcohol-related hospitalisations for Scotland in 2018 show similar rates to the year before.
- » Positive indications seen in the 7% reduction in hospitalisations for alcoholic liver disease
 - » Reduction was greatest for those in lower income groups.

Summary of evidence so far



Implementation and compliance

- High retailer compliance, with on-trade unaffected
- No evidence of increases in illegal activity
- No evidence of substantial impact on Scottish retailers near the border
- Some cross-border purchasing, often pre-dating MUP. No evidence of 'white van' runs



Alcohol consumption

- Reduction in off-sales in Scotland (vs. increase in England & Wales)
- Reduction mostly by heavier drinkers
- Consumers switching (smaller packs, lower-alcohol, and more premium products)
- Delisting of some products (large bottles of high-strength cider)
- Factors such as the influence of friends, parents and carers had much greater effect on young drinkers' consumption than price
- Young people's drinking has increased from 2015 to 2018 (still lower than previous years)



Alcohol market

- Little overall impact on retailer revenue
- Effects on producer revenues and profits were negative but small
- No significant impact on the on-trade
- No evidence of closed stores, reduced staff numbers or reduced investment
- Convenience stores now more competitive and seeing increased revenue



Health and social harm

- It is too early to see impact on harm
- Routine data shows similar death and hospitalisation rates to previous years
- However, positive indication in reduced alcoholic liver disease hospitalisations, particularly among lower income groups

MESAS evaluation studies published

NHS Health Scotland/Public Health Scotland

- [MESAS Monitoring Report 2019](#) – June 2019
- [Compliance \(licensing\) study](#) – August 2019
 - Telephone interviews with Licensing Standards Officers, Police Scotland Divisional Licensing Officers and Trading Standards Officers, shortly following MUP introduction
- [Sales-based consumption: a descriptive analysis of one year post- MUP off-trade alcohol sales data](#) – January 2020

Frontier Economics

- [Evaluating the impacts on the alcoholic drinks industry in Scotland: baseline evidence and initial impacts](#) – October 2019
 - Telephone interviews with retailers on either side of the England/Scotland border, 9 months post-MUP implementation
 - Interviews as part of case studies with specialist and non-specialist retailers, an on-trade retailer, spirits producers, and two brewers

Iconic Consulting

- [Minimum Unit Pricing in Scotland: Qualitative study of children and young people's own drinking and related behaviour](#) – January 2020
 - Interviews with 13-17 year olds who were drinking before and after MUP implementation, and with staff working with these young people
 - Those recruited were young people with a history of offending and substance use, and care experienced and LGBTI young people were recruited, as these groups were identified by a literature review as having alcohol use issues.
 - Excludes young people who do not drink.

You can find the full details of the evaluation on [the Public Health Scotland website](#), including a list of [the outcome areas and their associated studies](#).

Other available evidence

Newcastle University

- [Immediate impact of MUP on alcohol purchases](#) – September 2019
 - Household panel purchasing data from 2015-2018 (compares Scotland and England)

Routine health and survey data

- [Alcohol-specific deaths](#) – National Records of Scotland, June 2019
- [Alcohol-specific deaths in the UK](#) - Office for National Statistics, December 2019
- [Alcohol-related hospital statistics](#) – ISD, November 2019
- [Scottish Schools Adolescent Lifestyle and Substance Use Survey \(SALSUS\)](#) – Scottish Government, November 2019
 - Young people's self-reported use of alcohol

Trade press

- E.g. *Scottish Grocer and Convenience Retailer, Scottish Local Retailer, Scottish Licensed Trade News*

What's next?

Pending evaluation studies

2020

- Small retailers
- MESAS Monitoring Report 2020
- Prescribing
- Drinking at harmful levels: Short-term impacts
- Public attitudes to MUP Price distribution
- Consumption and health service impacts
- Homeless drinkers

2021

- MESAS Monitoring Report 2021
- Drinking at Harmful levels
- Alcohol products and prices in the retail sector

2021

- Alcohol products and prices in the wholesale sector
- Ambulance call-outs
- Self-reported consumption
- Crime, public safety and public nuisance

2022

- Household expenditure
- MESAS Monitoring Report 2022
- Sales-based consumption: Final Report
- Economic impact on the alcoholic drinks industry

2023

- Admissions and deaths
- MESAS Monitoring Report 2023
- Final report

Next steps for the policy

- Scottish Government has committed to review the price after two years of implementation, to ensure that this remains proportionate and effective
- Evaluation will continue, with final report due to be published late 2023
- This will be provided to the Scottish Parliament, who will use this to make a decision on whether or not the policy will continue (after 6 years of implementation)

*For more information on
minimum unit pricing,
please visit [our website](#) or
contact us by [email](#)*