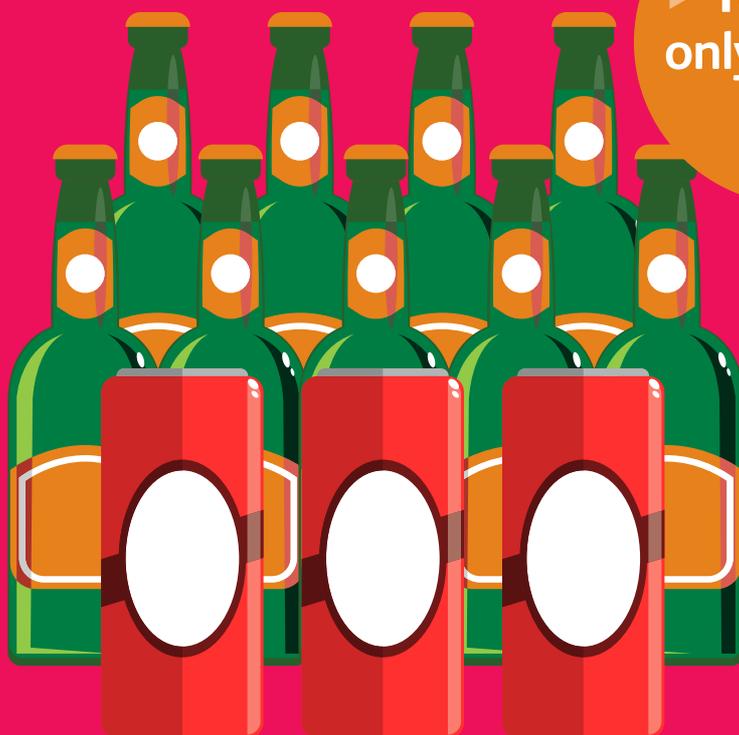
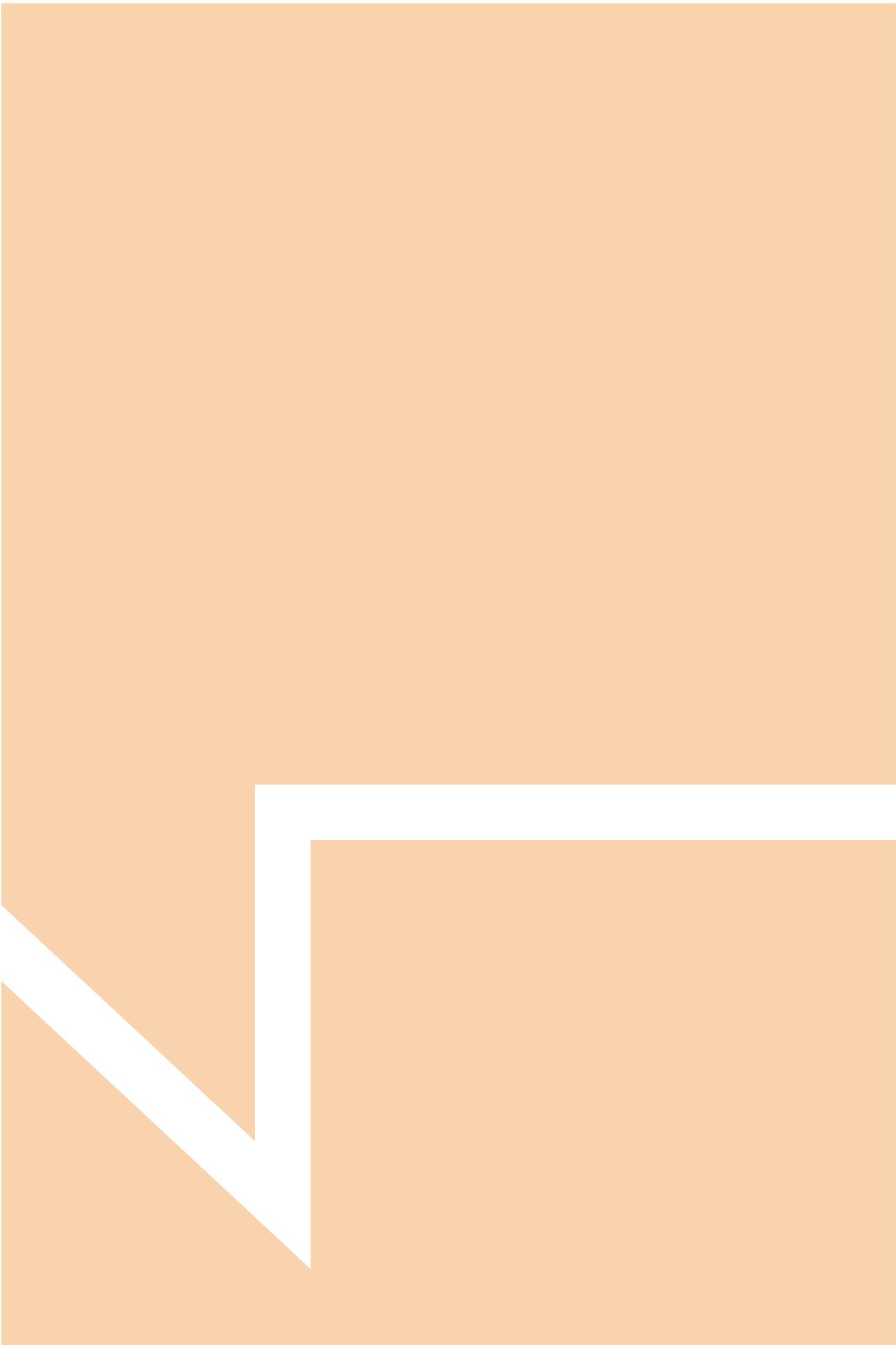


alcohol
health alliance uk

Cheap alcohol: the price we pay

► Ten for
only **£4**





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Summary

It has been five years since alcohol partners from across the UK carried out their last comprehensive price survey. A lot has happened in that time. The Coalition Government committed to introduce a minimum unit price (MUP) to tackle the harm caused by the cheapest alcohol. Then, with encouragement from sections of the alcohol industry, they decided to postpone its introduction until the outcome of a legal challenge to minimum unit pricing in Scotland had been resolved. The alcohol duty escalator – which increased duty by 2% above inflation – was scrapped. Wider duty rates were cut. And alcohol harm continued to rise.

Four member organisations of the Alcohol Health Alliance (AHA) – the Institute of Alcohol Studies; Alcohol Focus Scotland; Balance, the North East Alcohol Office; and Healthier Futures – decided to check how those changes had affected the price of alcohol that is available in communities across England and Scotland.

As part of the survey, the partners visited a range of off-sales premises looking for the nation's cheapest booze. Almost 500 products were examined and the conclusion is clear – alcohol continues to be sold at pocket money prices in supermarkets and off-licences across the UK.

Headline findings

- > Alcohol continues to be sold at pocket money prices, with white cider dominating the market for cheap, high-strength drinks.
- > High-strength white cider products, which are predominantly drunk by dependent and underage drinkers, are sold for as little as 16p per unit of alcohol.
- > For the cost of a standard off-peak cinema ticket you can buy seven and a half litres of 7.5% ABV white cider, containing as much alcohol as 53 shots of vodka.
- > Recent cuts in alcohol taxes allow shops and supermarkets to sell alcohol at pocket money prices but have done little to benefit pubs and their customers.
- > High-strength white cider is taxed at the lowest rate of all alcohol products. A can of 7.5% ABV white cider attracts less than one-third of the duty on a can of beer that is the same strength.

Recommendations

The Government needs to:

- 1 increase duty on high-strength cider
- 2 reinstate the alcohol duty escalator
- 3 upon leaving the EU, tax all alcoholic drinks categories in proportion to strength
- 4 implement a minimum unit price for all alcoholic drinks.

There is strong and consistent evidence that an increase in the price of alcohol reduces the demand for alcohol which in turn can lead to a reduction in harm, including for those who regularly drink heavily and young drinkers under 18. We can no longer afford to ignore this.

The Government's Alcohol Strategy, 2012

Background

It has been five years since AHA members across the UK last teamed up to check the price we are paying for alcohol.¹ That 2011 report revealed that alcohol was being sold at pocket money prices in communities right across the UK. The cheapest product we found then was Frosty Jack's cider, selling for as little as 12p per unit in some parts of the North East of England.¹

In the 2012 Government Alcohol Strategy, the then Coalition Government, led by David Cameron, accepted that the price of alcohol has a significant impact on how and how much people drink. It accepted the harm that drinking alcohol can lead to and the pressure that alcohol places on the emergency services. The Prime Minister even pledged to take evidence-based action to tackle the problem when he committed to the introduction of a minimum unit price for alcohol. At Prime Minister's Questions in 2013 he went on to say that sales of cans of lager for 20p were unacceptable and that things had to change.²

Change has come, but not the change that was promised.

Under pressure from global alcohol producers, plans to implement minimum unit pricing were put on hold and instead the sale of alcohol below cost price was banned, a measure that was estimated to affect less than 0.7% of alcohol products and to be 40 to 50 times less effective than an MUP set at between 40p and 50p.³

Subsequently, the former Chancellor of the Exchequer, George Osborne, spurred on by the alcohol industry, then embarked on a series of cuts in alcohol duty, including an end to the alcohol duty escalator which increased duty by 2% above inflation and which was quoted in the 2012 Government Alcohol Strategy as an example of how the Coalition Government was tackling the problems caused by cheap alcohol. As a result, since 2012 beer duty has fallen 14%; cider and spirits duty is 6% lower; and wine duty is unchanged.⁴ According to Treasury estimates, by 2017/18 these measures will have made government finances worse off to the tune of £2.9 billion.⁵

The former Chancellor stated that his programme of duty cuts was designed to protect the beleaguered pub, an admirable ambition given that they generally provide a safer, more controlled environment for drinking as well as being at the heart of so many communities.

However, that ambition has not been realised. Pubs continue to close and the proportion of alcohol being sold from supermarkets

and other off-trade premises has reached record levels. Over two-thirds of alcohol is now sold in supermarkets and off-licences across Britain, according to the latest figures.⁶ An analysis of the retail price index (RPI) indicates one reason why: the price of beer sold in pubs relative to the price in off-trade premises has increased significantly since the alcohol duty escalator was scrapped and Mr Osborne's programme of duty cuts began. It seems that the stronger bargaining power of supermarkets enables them to pass on those cuts to customers more readily than pubs.

Fig 1 Beer prices since the introduction of the duty escalator



Source: Retail price index

*When beer is cheaper than water, it's just too easy for people to get drunk on cheap alcohol at home before they even set foot in the pub. So we are going to introduce a new minimum unit price. For the first time it will be illegal for shops to sell alcohol for less than this set price per unit. **Prime Minister David Cameron, the Government's Alcohol Strategy, 2012***

In committing to the introduction of minimum unit pricing, the Scottish Government has been much more proactive in trying to address alcohol harm. However, a democratic decision to get rid of the cheapest, strongest alcohol from the marketplace has been thwarted by sections of the alcohol industry, led by the Scotch Whisky Association, who have challenged the decision in the Scottish and European courts. While those legal arguments continue, lives that might otherwise have been saved are being lost.

In the meantime, as a result of pressure from the alcohol industry and decisions taken in Westminster, alcohol sales are showing signs of increasing again for the first time since 2004.⁶

Why price is important

Raising alcohol prices can improve population health, and doing so in the cheapest segment of the market may be more effective in tackling harmful drinking. Organisation for Economic Co-operation and Development, 2015⁷

The simplest way to reduce demand for alcohol is to put the price up. Like most consumer products, demand for alcohol is inversely related to its price. When demand for alcohol falls, so too does alcohol-related harm... Health First, 2013⁸

Of all the alcohol sold, very cheap alcohol products play the biggest part in driving alcohol-related harm. Health First, 2013⁸

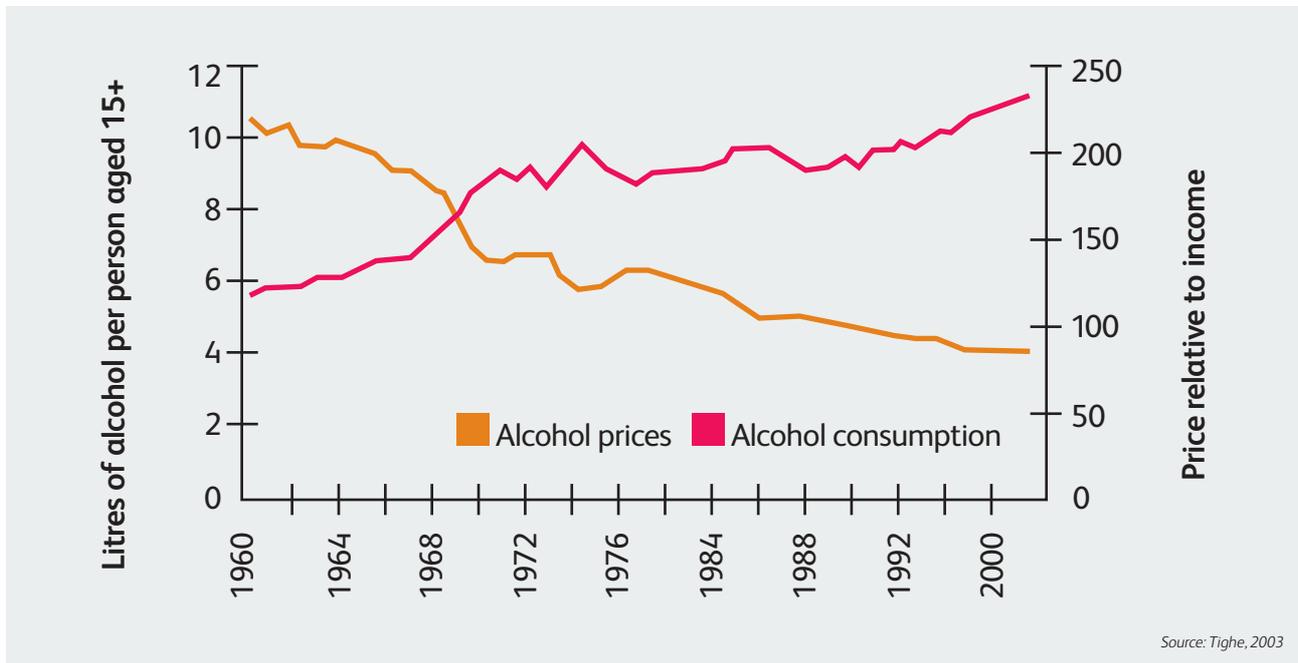
As any good alcohol industry marketer knows, price influences consumption. That is why special occasions such as major sporting tournaments, the onset of the barbecue season and Christmas herald the introduction of special pricing offers.

That matters because the more we drink, the greater the harm. The average consumption of pure alcohol per drinker has almost doubled since the middle of the last century. And while we have seen falls in consumption in recent years – 14% in terms of sales per head between 2005 and 2013 – the latest figures indicate that sales are starting to increase again.⁶ Significant factors in that rise are likely to be the abolition of the alcohol duty escalator and recent cuts in alcohol duty.

Incidentally, one category of alcohol that seems to have been immune from falls in consumption in recent years is cider. While the market remains small in comparison to beer, cider sales have increased by 50% per head of population in England and Wales in the last 10 years.⁶

Cider sales have increased by 50% per head of population in England and Wales in the last 10 years.

Fig 2 Chart showing the close correlation between the affordability and sale of alcohol



Sales figures indicate that enough alcohol is sold in England and Wales for every drinker to be consuming an average of 22 units per week, well above the Chief Medical Officers' new weekly low-risk guideline of 14 units. The figure for Scotland is even higher, at nearly 25 units.^{6,9,10}

Why change is needed

As a nation, we are drinking too much. Alcohol plays a big part in our social, economic and cultural lives, and in recent decades alcohol consumption has increased significantly.

Relatively speaking, alcohol is 60% more affordable now than it was in 1980.¹¹ We now buy around two-thirds of our alcohol in off-trade premises, largely from supermarkets.⁶

The implications of cheap alcohol for our health and society are far-reaching.

Alcohol consumption is causing major issues when it comes to our health:

- > In England almost 23,000 deaths each year are related to alcohol.¹²
- > Every year, over one million hospital admissions are related to alcohol use.¹¹
- > One person dies every hour from alcohol-related causes.¹³
- > Alcohol accounts for 10% of the UK burden of death and disease, making it one of the three biggest lifestyle risk factors in our country.¹⁴
- > Alcohol is a poison with links to around 200 medical conditions and injuries, including at least seven different types of cancer.¹⁵

While many drinkers recognise that alcohol can cause problems, most would never describe themselves as a problem drinker. In fact, in a 2015 public opinion survey carried out by Balance, the

North East Alcohol Office, nine in ten people who were drinking above the old recommended consumption guidelines described themselves as 'light' or 'moderate' drinkers.¹⁶

Awareness of the health risks, particularly when it comes to cancer, is also very low, with Cancer Research UK reporting recently that **nine in ten people do not associate drinking with an increased risk of cancer.**¹⁷ This is despite the fact that the latest evidence states that any level of regular drinking can increase the risk of a number of cancers.¹⁸

Furthermore, despite the fact that more children are choosing not to drink, alcohol continues to harm young people. In 2013/14, more than 10,000 children in the UK sought treatment for alcohol.¹⁹ While alcohol dependence is thankfully still rare among children and young people, and consumption among young people is reducing, the numbers requiring support from alcohol services reflects poorly on society's relationship with the nation's favourite drug.

Increased alcohol sales mean more alcohol-related deaths, more alcohol-related hospital admissions and more pressure on our emergency services. With around half of all violent crime being alcohol related,²⁰ it is also putting the safety of everyone at risk, not just the drinker.

And we are all paying the price. The Government estimates that alcohol misuse costs the NHS up to £3.5 billion every year (equal to £120 for every UK taxpayer)²¹ and the wider society in the UK more than £21 billion;^{22, 23} around half the total schools budget for England and Wales.²⁴

What we found

Methodology

During April and May 2016, we visited four areas in the UK – the North East of England, the North West of England, Scotland and London – to investigate how cheaply alcohol is being sold. We looked at where, how and what brands of alcohol are being sold in the off-trade premises (supermarkets, shops and off-licences).

We surveyed 480 products in total, looking at the individual price; alcohol content (alcohol by volume (ABV) / units); the type of drink and brand; the size and number of containers in a pack; the retailer; and the location and date. We captured photographic evidence where possible.

With that in mind, our study is not designed to show a representative sample. We aimed to find the cheapest products available to consumers; that is, products that are under the 50p minimum unit price threshold that is proposed by a number of public interest groups including the police, doctors, children's charities and health campaigners. We found them in abundance.

Results

Cheap booze can be found on every street corner.

Fundamentally, very little has changed since the last report was carried out five years ago. Alcohol continues to be sold at pocket money prices.

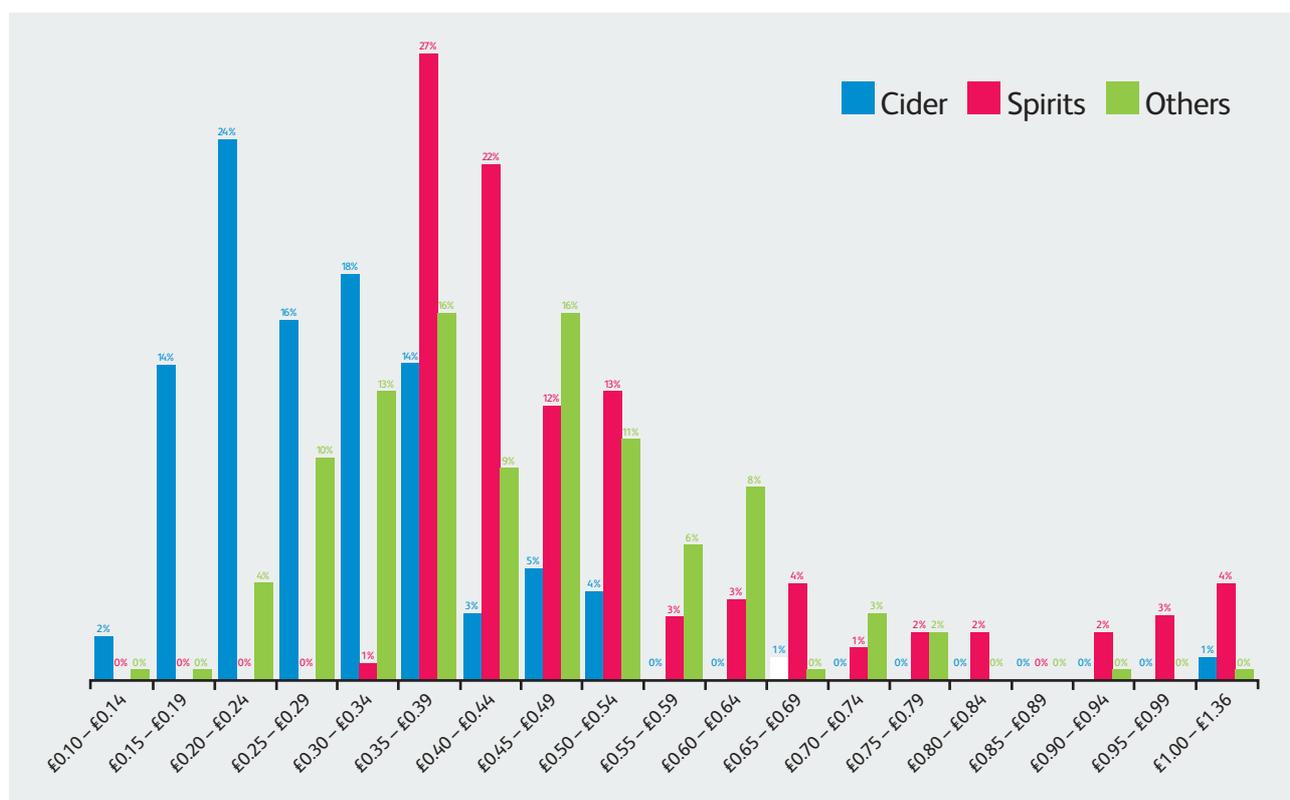
While the lowest price we report is 16p per unit, we found a broad range of products on sale for 25p or less, which is half the 50p minimum unit price recommended by health bodies and alcohol charities.

At the cheapest price per unit for white cider (16p), the low-risk drinking limit of 14 units per week for both men and women could be purchased for just £2.24.

White cider and spirits – headline findings

- > The lowest price for white cider was 16p per unit.
- > At the lowest price for white cider (16p per unit), you could drink the low-risk weekly limit of 14 units for just £2.24.
- > The average child's weekly pocket money of £5.75 could buy more than double the adult weekly recommended limits.

Fig 3 The percentage split of product types by price per unit, demonstrating a high proportion of ciders in the lower price brackets



White cider and spirits – targeting the most vulnerable.

White cider, in particular, dominated the ranks of the cheapest products.

High-strength white cider is a product that has largely developed because of anomalies in the tax system. Cider of 7.5% ABV attracts the lowest level of duty of any alcohol product at any strength.²⁵ For example, a 500 mL can of cider at this strength generates 19p of duty, less than a third of the duty on a can of beer of equivalent size and strength (69p). It is no surprise, therefore, that a number of ciders are produced at exactly this ABV to fully exploit the duty structure.

High-strength white ciders and spirits are the drinks of choice for many underage and dependent drinkers. In recent years, many doctors, psychiatrists, outreach teams and charities have expressed concerns about high-strength cider and spirits and the harms they cause.

White cider and spirits have featured highly in the last three surveys carried out by Alcohol Concern of the brands that are favoured by children in treatment services.¹⁹ Currently Frosty Jack’s, which consistently appears in the top five preferred drinks, is available for £3.49 for 3 L, which works out at 16p per unit of alcohol. Interestingly, the leading high-strength cider brand describes itself as the choice ‘for those who don’t want to conform’, thus tapping into the rebellious nature of many teenagers, sometimes with damaging consequences.

According to Alcohol Concern,¹⁹ one in five children who drink now consume 15 or more units per week – over the weekly low-risk limit for an adult. An individual who begins drinking as a young teen is four times more likely to develop alcohol dependence than someone who waits until adulthood to use alcohol.²⁶

Almost half of young people who are excluded from school in the UK are regular drinkers.¹⁴

Cheap, strong alcohol is not just a problem for children. Jeremy Swain from Thames Reach, which works with over 7,000 people every year who have experienced homelessness in London, commented:

‘Super-strength drinks have become one of the biggest causes of death of homeless people in the UK, and our figures indicate that super-strength drinks are doing more damage than both heroin and crack cocaine.’ In total, 78 per cent of the deaths in Thames Reach hostels were attributed to high-strength alcohol.²⁷

The prominence of high-strength cider among these groups is primarily due to its cheapness. Studies of white cider drinkers have indicated that 75–85% favour it for its low price.²⁸ Alcohol Concern’s research found that while it is often argued that raising prices would not change the drinking habits of this group, it was very apparent during interviews that most of them have a very detailed knowledge of price variations. High-strength cider has a particularly damaging position relative to other drinks, with evidence that it is seen as a ‘buffer drink’, aiding harmful drinkers in maintaining their consumption even when their financial circumstances decline.

Supermarkets – the only winners when it comes to cheap booze.

Alcohol products for sale at under 50p per unit were not just found at discount retailers. The research team also found a wide range of examples at the ‘big four’ supermarkets. Of the supermarkets surveyed as part of this report, the cheapest product was found at Sainsbury’s – White Star, priced at 18p per unit of alcohol. Asda also offered Lambrini, priced at 19p per unit.

In our research, we also found an abundance of summer-focused promotions. The promotions included deals on multi-packs and free giveaways with alcohol purchases, enticing people to buy.

What is clearly evident from our findings is that alcohol tax and pricing policy is enabling supermarkets to sell alcohol at pocket money prices. The duty cuts in recent years appear to have done little to benefit pubs and their customers, and the pricing policies we are seeing in supermarkets across the board are a major cause of binge drinking. This is fuelling a culture of ‘pre-loading’ (drinking before going out) and resulting in the steady closure of the country’s pubs, where people can enjoy leisure time in a safe, controlled environment.

Pocket money prices

- > A standard 'off-peak' cinema ticket can be bought for £8.24 – this would buy you two and a half 3 L bottles of the cheapest white cider, or 53 units.
- > The minimum hourly wage for those aged under 18 is £3.87. After just an hour's work, you would still have 38p change after buying a 3 L bottle of Frosty Jack's containing 22.5 units of alcohol.
- > For the cost of a monthly Netflix subscription at £7.49, you would have change from buying two, 3 L bottles of Frosty Jack's.
- > Today, £10 will not buy you a large Domino's pizza, but you would have a penny left over from a 700 mL bottle of 40% Putinoff vodka at £9.99.

The worst offenders – lowest unit prices

- > cider – lowest price found: 16p
- > perry – lowest price found: 19p
- > lager – lowest price found: 25p
- > wine – lowest price found: 32p
- > vodka - lowest price found: 36p.

In terms of a north/south divide, when we carried out this survey, we found very little to differentiate with regard to price. Wherever they were in the country, whether in affluent or more deprived areas, researchers were able to locate alcohol at cheap prices.

Region	Premises	Name	ABV	Price	Price per unit
Beer/lager					
London	Aldi	Galahad (4 x 440 mL)	4.0%	£1.99	£0.28
North East	Aldi	Own brand (4 x 440 mL)	2.0%	£0.89	£0.25
North West	Tesco	Own brand (4 x 440 mL)	2.0%	£1.00	£0.28
Scotland	Asda	Biere de Luxe (4 x 440 mL)	3.5%	£1.60	£0.26
Cider					
London	Bargain Booze	Frosty Jack's (3 L)	7.5%	£3.49	£0.16
North East	Independent	White Ace (3 L)	7.5%	£3.99	£0.18
North West	Bargain Booze	Zeppelin (3 L)	7.5%	£3.99	£0.18
Scotland	Independent	White Ace (3 L)	7.5%	£3.99	£0.18
Vodka					
London	Lidl	Rachmaninoff (700 mL)	37.5%	£9.99	£0.38
North East	Independent	Krakus (700 mL)	40.0%	£10.00	£0.36
North West	Aldi	Tamova (700 mL)	37.5%	£9.99	£0.38
Scotland	Lidl	Putinoff (700 mL)	40.0%	£9.99	£0.36
Wine					
London	Lidl	Own brand (3 L)	14.0%	£13.29	£0.32
North East	Aldi	Own brand (750 mL)	13.0%	£3.69	£0.38
North West	Aldi	Own brand (750 mL)	13.5%	£3.29	£0.32
Scotland	Aldi	Own brand (750 mL)	13.5%	£3.29	£0.32
Perry					
London	Morrisons	Own brand (1.5 L)	7.5%	£2.73	£0.24
North East	Asda	Still Lambrini (3 L)	7.5%	£4.25	£0.19
North West	Aldi	Grove Manor (3 L)	7.5%	£4.29	£0.19
Scotland	Sainsbury's	Lambrini Bianco (1.5 L)	7.5%	£2.50	£0.22

Why is white cider so much cheaper than beer?

It is the idiosyncrasies of the duty system that allow white cider to be sold so cheaply. As mentioned earlier, cider of 7.5% ABV attracts the lowest level of duty of any alcohol product at any strength, with a 500 mL can of cider at this strength generating 19p of duty, less than a third of the duty on a can of beer of equivalent size and strength (69p). A number of ciders are produced at exactly this ABV to fully exploit the duty structure.

There are two fundamental reasons for this anomaly. Firstly, cider is taxed at a lower level than other drinks categories. Secondly, cider is taxed by volume, rather than by alcohol content, meaning that stronger drinks within the same duty band are taxed exactly the same.

At present, duty rates for cider are split into two bands: 1.2–7.5% ABV and 7.5–8.5% ABV. The lower band is extremely wide, particularly in light of the fact that cider is taxed by volume (and so there is no variation in duty within bands either) with the effect being that the weakest ciders on the market (around 2.5–3%) attract the exact same duty as 7.5% white ciders for comparable containers (£38.87 per hectolitre).²⁹

What should we do?

As this report makes clear, alcohol is still available at pocket money prices. Harmful drinkers and children are still choosing the cheapest products: predominantly white cider and cheap vodka.

We need to make alcohol less affordable through the tax system and we need to get rid of the cheapest, strongest alcohol by introducing a floor price below which alcohol cannot be sold – that means a minimum unit price.

The effectiveness of using alcohol taxes to reduce consumption is well recognised and is seen as an effective intervention by organisations like the World Health Organization (WHO) and the Organisation for Economic Co-operation and Development (OECD).

The evidence that minimum unit pricing is a targeted and effective intervention is getting stronger and research shows that introducing an MUP would have the greatest impact on the heaviest and youngest drinkers.

Modelling by the University of Sheffield³⁰ estimated that in the first year alone, introducing a 50p MUP in Scotland would mean:

- > 60 fewer deaths
- > 1,600 fewer hospital admissions
- > 3,500 fewer crimes.

Work commissioned by the Government from the University of Sheffield revealed that 1 year after introducing an MUP in England there would be:³¹

- > 50,700 fewer crimes
- > 376,600 fewer days absent from work
- > 192 fewer deaths.

After 10 years, alcohol-related hospital admissions would be down 35,100 per year and over the period would lead to substantial gains to the quality of life of individuals, which health economists value at £5.1 billion.³¹

Interestingly, it would also reduce health inequalities, with 8 out of every 10 lives saved coming from the lowest income groups.³²

Minimum pricing is working in practice in parts of Canada where it has resulted in a reduction in the amount people drink, with fewer alcohol-related hospital admissions, fewer deaths and a fall in alcohol-related crime.^{33–36}

As independent experts acknowledge, addressing the affordability of alcohol will not solve every problem caused by alcohol, but it should be the central pillar of any evidence-based alcohol strategy. That central pillar was in place in the 2012 Government Alcohol Strategy but, with the help of sections of the alcohol industry, it was knocked down, with the result that we continue to see lives being put at risk because of the widespread availability of incredibly cheap, strong alcohol.

Recommendations

As a key element of a comprehensive, evidence-based alcohol strategy, the Government needs to:

- 1 Increase duty on high-strength cider.** Due to anomalies in the excise system, high-strength 7.5% ABV ciders are available for the lowest price per unit of any drink. As a result, they are overwhelmingly favoured by dependent, street and young drinkers. Restructuring cider duty so that these products can be targeted with higher tax rates would substantially reduce the harms associated with them.
- 2 Reinstate the duty escalator.** Alcohol sold in the UK is 60% more affordable than it was in 1980. We know that price drives consumption; duty levels should continue to increase year on year to counter the trend of increasing affordability that has been associated with rising consumption and harm.
- 3 Upon leaving the EU, tax all alcoholic drinks categories in proportion to strength.** The current structure of UK alcohol taxes is governed by European directives in a way that means it is not possible to tax wine or cider in proportion to their alcohol content. With the country having voted to leave the EU, the Government should ensure that stronger wines and ciders face higher rates of duty, and should defend its freedom to do so in future trade agreements.
- 4 Implement a minimum unit price for all alcoholic products.** Minimum unit pricing is needed to deal with the particular problem of the cheapest, strongest drinks that are favoured by the heaviest drinkers and is compatible with promoting an alcohol duty structure for other products.

Appendix: minimum unit pricing and tax – dispelling the myths

A minimum unit price would only target the highest strength drinks that cause the most harm. There are many myths surrounding minimum unit pricing, which the alcohol industry uses to dissuade people from supporting it. We have included here just a few of those myths and our responses.

Myth: An MUP would affect moderate drinkers too.

Moderate drinkers would experience very little impact from minimum unit pricing, which makes it one of the most effective measures, as it only targets the most harmful drinks of the kind deliberately sought out in this survey. The price of a pint of beer in a pub, for example, would not be affected by minimum unit pricing.

Myth: Taxation would be more effective than an MUP.

Recent research from the University of Sheffield found that, to achieve the same level of impact as an MUP of 50p, a 28% increase in all alcohol duty would be needed, which is outside the realms of possibility when it comes to what the Government will do. Everyone would be affected by these measures, whereas minimum unit pricing only targets the cheapest, strongest drinks.

Myth: Tax and minimum unit pricing cannot be used together.

Increasing duty and introducing an MUP are often presented as alternative solutions, when they can in fact be used to complement each other. Minimum unit pricing is targeted at the cheapest alcohol that is consumed by the most harmful drinkers but there are limits to its impact on wider population alcohol consumption and health, which increases to duty overall would help to tackle.

Tax rises and tougher rules on alcohol promotions work well, but they will always work better when combined with minimum unit pricing.

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The logo for Alcohol Health Alliance UK features the word "alcohol" in a large, bold, lowercase pink font, with "health alliance uk" in a smaller, lowercase pink font directly below it. The text is contained within a pink speech bubble shape with a tail pointing downwards.

About the Alcohol Health Alliance UK

The Alcohol Health Alliance (AHA) is a coalition of more than 40 organisations who share an interest in reducing the damage caused to health by alcohol misuse in the UK. Our members include medical bodies, charities and alcohol health campaigners. For further information and/or to set up a meeting with an AHA representative, please contact us:

alcohol@rcplondon.ac.uk | 020 3075 1612 / 020 7566 9809.