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Convenor, Health, Social Care and Sport Committee
The Scottish Parliament
Edinburgh
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Dear Convenor

Re: Evaluation of minimum unit pricing (MUP) for alcohol

I am writing to update the Health, Social Care and Sport Committee for Session 6 on the evaluation of MUP. This letter is our third annual written update on the evaluation following our meeting with the previous Health and Sport Committee in April 2019, and written updates in [May 2020](#)¹ and [July 2021](#)². The July 2021 letter provided the new Committee with an overview of MUP and the evaluation. This letter provides a summary of findings from studies published since June 2021, a brief overview of evaluation progress, including on the final report, and a list of studies still to report.

A description of the evaluation and the reports published so far can be found on [our webpages](#)³, or in the [full study protocol](#)⁴. Full study reports and plain English briefing papers for all the published studies are available on [our webpages](#)⁵.

The main findings from the reports since June 2021

1 The impact of MUP on crime and disorder, public safety and public nuisance – report and briefing paper

Public Health Scotland and Manchester Metropolitan University published a report in October 2021 looking at the effect of MUP on trends in crime and disorder, public safety, and public nuisance.

In general, researchers found little discernible effect of MUP, including on unintended consequences such as drug-related crime. Analysis by gender, age, geographic location and socio-economic status also found little discernible impact of MUP.

Data were police records from Police Scotland relating to a wide range of alcohol-related and non-alcohol-related offences, and covered January 2015 to January 2020 (including 21 months post-MUP implementation). Further data were obtained from Greater Manchester Police, allowing researchers to compare Glasgow to a similar city without MUP. The range of statistical methods used allowed researchers to control for important external factors such as seasonality and previous data trends.

2 The impact of MUP on cross-border purchasing – briefing paper

In March 2022 we published a report on evaluating the impact of MUP on cross-border purchasing. We examined existing literature and evidence alongside new analyses to assess whether cross-border purchases are occurring at a level that may materially affect alcohol consumption at the population level or among particular groups in Scotland, or that may affect retailers.

Analysis of off-trade alcohol sales data in the combined areas of North East and North West England in the 12 months following implementation of MUP showed a small increase (1.14%), controlled for sales in the rest of England and Wales. When a panel of over 1,000 Scottish adults was asked whether they had travelled to another part of the UK for the sole purpose of buying alcohol to bring back to Scotland, only 3% responded that they had done so. A larger proportion (13%) reported bringing alcohol back to Scotland that they had purchased on a visit for another purpose. The research also shows that licensing near the border did not display a shift from Scotland to England following the introduction of MUP legislation.

There appears to be a distance-based effect on cross-border alcohol purchasing shown in the literature, with most cross-border sales occurring in households near to the border. Most of the Scottish population live in Glasgow, Edinburgh, Aberdeen or Dundee, where a significant degree of cross-border purchasing for households is unlikely due to their distance from the border. The findings on self-reported behaviours of a representative online panel are consistent with this. Also consistent with this was demand analysis showing that large amounts of alcohol would need to be purchased to make significant savings, after meeting the costs of travelling across the border. For example, taking into account journey costs, someone living in Glasgow would need to spend between £63 and £309 to just break even, depending on the type of alcohol purchased. The average price for unleaded petrol in the UK at the time of this analysis in May 2020 was 106.7p per litre. Journey costs would be higher now with current fuel prices, weakening further the incentive to engage in cross-border purchasing. There were similar findings for cross-border online purchasing, taking delivery costs into account.

The report concluded that while cross-border purchasing occurs, the extent is small relative to the overall purchasing behaviours of the population as a whole and it is unlikely to be happening on a scale that would significantly affect consumption at a population level or materially affect other outcomes identified in the MUP theory of change.

3 The impact of minimum unit pricing in Scotland on people who are drinking at harmful levels – [report and briefing paper](#)

In June 2022 we published the final report from a study which evaluated the impact of minimum unit pricing (MUP) on people who drink alcohol at harmful levels, including those dependent on alcohol and those accessing treatment services. The University of Sheffield, the University of Newcastle (Australia) and Figure 8 Consultancy Services carried out the wide-ranging study to understand how this important yet hard-to-reach population responded to MUP.

A large programme of mixed-methods research was used to examine impacts on alcohol purchasing and consumption, other positive and negative effects of the policy, and the impact on key groups, such as family members or those living in remote or rural areas. There were three work packages: a study of people accessing treatment related to their alcohol dependence and service providers; interviews with those drinking at harmful levels

and family members recruited through the community; and analysis of a longstanding self-report survey on drinking behaviour conducted by a market research company.

The findings showed that the price of alcohol purchased by people with alcohol dependence increased from £0.49 to £0.59 and 62% of those completing a survey said they had noticed a price increase.

Among those drinking at harmful levels or people with alcohol dependence, the study found no clear evidence of a change in consumption or severity of dependence. The analysis of the market research data found that the prevalence of drinking at harmful levels in the last week did not change significantly, the proportion of people drinking at hazardous levels fell significantly by 3.5%, and the proportion drinking at moderate levels did not change significantly. The qualitative interviews from this study found that people drinking at harmful levels responded to MUP in a range of ways, including consuming less alcohol and switching from drinking strong ciders or beers to vodka.

Findings also showed that some economically vulnerable groups experienced increased financial strain as the price rises meant they were spending more on alcohol. Among those presenting for treatment, 20% reduced spending on other things and 14% tried to obtain additional money (e.g. by borrowing from family and friends).

There was little evidence found of other negative consequences in this population following the introduction of MUP, such as increased crime, a shift to the use of illicit substances or acute withdrawal. People with alcohol dependence were also found to have a limited awareness and understanding of MUP and reported receiving little information or support before its introduction.

People who drink at harmful levels, and particularly those with alcohol dependence, are a diverse group with complex needs who often experience multiple interacting health and social problems. Many are likely to drink low-cost high-strength alcohol affected by MUP and are at greatest risk from their alcohol consumption. This population therefore have the potential to benefit the most from MUP but may also continue to experience harms. This research further develops our understanding of and insights into this important population and how they have responded to MUP across a broad range of areas.

4 The experiences of MUP of homeless drinkers, street drinkers and service providers – CSO report

This qualitative study was funded by the Chief Scientist Office and led by researchers from Caledonian University. The researchers found that homeless and street drinker interviewees were generally aware of MUP but that it was considered a lower priority than other difficulties they faced on a day-to-day basis.

Reported impacts on the quantity and type of alcohol consumed were varied. Some individuals reduced their drinking, some were unaffected, some switched drinks, and for some who already used drugs, the balance between alcohol and drugs consumed shifted toward the latter.

The research found that among participants, MUP exacerbated an existing tendency for a minority of problem drinkers to beg or steal to obtain alcohol, or to prioritise acquisition of alcohol over necessities such as food when they ran out of money.

The study reported that MUP had negligible if any discernible impact on services that work with homeless and street drinkers. The researchers recommended that policy makers in Scotland need to devise mitigations for the unintended outcomes affecting a minority of homeless and street drinkers, and that other countries considering MUP should support stakeholders prior to implementation to exploit potential benefits as well as mitigate unintended consequences.

The remaining reports on MUP in Scotland published during this period were not part of the MUP evaluation portfolio of planned studies.

5 MUP and motor vehicle collisions in Scotland – journal paper

This study was undertaken by researchers from Kings College, London. The researchers used data on the daily number of motor vehicle collisions resulting in death or injury in 2018 and used a statistical approach to compare trends before and after the introduction of minimum unit pricing. Controlling for seasonality, they found a small relative decrease (of between 1.52 and 1.90, on average) in collisions in Scotland compared with England and Wales in the first months after the introduction of the policy.

6 The hangover: The cost of MUP in Scotland – report

This report published by the Institute of Economic Affairs in May 2022 uses annual alcohol sales and price distribution data from 2017 to 2020 published by PHS in the Monitoring and Evaluating Scotland's Alcohol Strategy (MESAS) Monitoring Report 2021. The methodology is not described in detail, but they compared annual sales from 2017 (the last full year before MUP implementation) with sales from 2019 (the first full year after implementation) and 2020 in Scotland and in England and Wales, where MUP was not implemented. They estimated that in 2019, compared to England and Wales, 9.7 million fewer litres of pure alcohol were sold in Scotland below 50p/unit, an extra 8.2 million litres were sold at 50–64p/unit and an extra 0.4 million litres were sold above 70p. They estimate a net additional cost of MUP to consumers of £93.6 million. Repeating the analysis using 2020 data, when COVID-19 restrictions severely disrupted the on-trade, they estimate that customers bought 9.9 million fewer units below 50p than they would have done in the absence of MUP and 8.3 million more units between 50–84p. In total, they estimated that the net additional cost of MUP in 2020 was £41.4 million. Extrapolated over the four years of implementation, they estimated that MUP has cost Scottish consumers £270 million, which amounts to £59.39 per adult or £71.12 per drinker over the four years of implementation and that this is more than the modelled estimates prior to implementation. They suggest there is little evidence of health and social benefits, with most indicators related to alcohol-related health, crime and employment remaining similar or worsened since MUP was implemented, although they recognise that many of the projected benefits were so small it would be difficult to identify them in aggregate data.

Other MESAS non-MUP publications

In addition to the MUP evaluation reports, we published the following reports, which contain important analysis to assist interpretations in the final report by providing more understanding of alcohol sales data as an estimate of population consumption and the impact of COVID-19 on alcohol consumption and related harms.

Alcohol sales and harm in Scotland during the COVID-19 pandemic – [report](#)

In February 2022 we published a report examining the latest trends in alcohol sales and related health harms in Scotland and how these have been impacted since the start of the COVID-19 pandemic. While not directly part of the MUP evaluation, the report provides important contextual understanding of alcohol consumption and related harm during the pandemic.

We presented data on alcohol sales up to 8 May 2021, hospital stays up to 31 March 2021 and deaths up to 31 December 2020. We found that alcohol consumption at a population level was lower than in the pre-pandemic period (2017–19): 9% lower in 2020 and 16% lower between January and May 2021. This was driven primarily by pandemic-related restrictions resulting in substantially reduced sales through on-trade premises. While there was an increase in sales of alcohol through the off-trade, these did not fully account for the lost on-trade sales.

Alcohol-related hospital stays were around 7% lower in 2020 than the average for the comparative pre-pandemic period (2017–19). Alcohol-related stays fell the most during periods when pandemic-related restrictions were at their most stringent. Rates of alcohol-related hospital stays decreased most for males, those aged over 45 years, and those living in deprivation quintiles 1 (most deprived), 2 and 4. In general, these groups had the highest rates of alcohol-related stays in 2017–19.

Deaths from causes wholly attributable to alcohol ('alcohol-specific deaths') increased following the start of the pandemic. This was driven primarily by an increase in alcohol-specific death rates among males and those aged 45 to 64 years.

The report concluded that increased rates of alcohol-specific death for some groups potentially supported existing evidence that drinking at hazardous and harmful levels may have increased for some groups, despite consumption reducing at the population level. Of

concern is the potential that groups with high levels of alcohol consumption before the pandemic may have increased their alcohol consumption, had reduced access to hospital treatment for alcohol-related conditions, and therefore potentially experienced higher rates of mortality. The report recommended that tackling alcohol consumption and harms, particularly among high-risk groups, should be a critical objective of any COVID-19 recovery plans.

The impact of using different sources of alcohol retail sales data on estimates of population consumption – [report](#)

In March 2022 we published a report that examined alcohol retail sales data from the two primary data providers in the UK, Nielsen and IRI. The retailer coverage and methods used by Nielsen and IRI to estimate off-trade alcohol retail sales are largely similar. Notable differences include a difference in the approach to calculating pure alcohol volume, the availability of sales data by geographical area and use of wholesale data in sales estimates.

We found that the trends in population-level consumption produced using the different sources were largely similar, but using Nielsen data typically resulted in lower per-adult estimates. We undertook statistical analysis using both data sources to assess the impact of MUP on population-level consumption in the first year following implementation. Both sources demonstrate a reduction in per-adult alcohol sales.

Nielsen data are available to the MESAS team for a much longer time series and for the geographical areas of Scotland, and England and Wales (combined), important considerations when data are used in monitoring and evaluating policy. The MESAS team will continue to use Nielsen data as our primary data source when monitoring and evaluating the impact of Scotland's alcohol strategy on population-level alcohol consumption.

Assessing the validity and reliability of alcohol retail sales data when being used to estimate population level consumption – [report](#)

We found that alcohol retail sales data are more likely to underestimate than overestimate consumption at a population level. This is in line with previous studies we published in [2012](#) and [2015](#) examining the validity and reliability of alcohol retail sales data. The MUP evaluation will continue to use alcohol retail sales data to estimate population-level alcohol consumption.

Evaluation progress

The implementation of the evaluation is broadly on track. There have been some delays to the publication of some reports, largely due to capacity issues related to the COVID-19 pandemic. Any risks continue to be managed and remain within acceptable boundaries. We continue to engage with a broad range of stakeholders and disseminate reports widely, including through Twitter.

We have started work on the final, overarching report, which we plan to publish in June 2023. We have established an Evaluation Advisory Group to oversee this work and provide advice. We have drafted a protocol that outlines how we will synthesise the evidence from MESAS-funded, separately funded and other studies of sufficient quality. We are working with Scottish Community Development Centre and Scottish Recovery Consortium to consult soon with members of our various governance groups and experts through experience on what we have done and how we plan to bring together the study findings. We will then do the same next year to engage on our interpretations and the conclusions we draw.

We hope this update has been useful. We are happy to meet to discuss any aspect of the evaluation if this would be helpful. We will write again after the final report has been published.

Yours sincerely

Clare Beeston

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Public Health Scotland

Appendix: Forthcoming publications

Notwithstanding any unanticipated delays, during the rest of 2022/23 we expect to publish the following reports:

- MESAS monitoring report 2022
- Economic impact on the industry in Scotland
- Sales-based consumption
- Hospital admissions and deaths
- MUP and drugs

Publication of the MESAS-funded studies will then be complete.

In addition, we expect publications from the remaining separately funded studies later in 2022 and beyond. These include:

- Self-reported consumption
- Prescribing for alcohol dependency
- Ambulance call outs
- Household expenditure on food, and nutritional quality

References

- 1 www.healthscotland.scot/publications/mup-letter-to-convenor-of-scottish-parliament-s-health-and-sport-committee
- 2 <https://publichealthscotland.scot/publications/mup-letter-to-convenor-of-scottish-parliament-s-health-social-care-and-sport-committee>
- 3 www.healthscotland.scot/MUPEvaluation
- 4 www.healthscotland.scot/media/3346/study-protocol-for-the-evaluation-of-mup-updated-may-2021.pdf
- 5 www.healthscotland.scot/health-topics/alcohol/evaluation-of-minimum-unit-pricing-mup/overview-of-evaluation-of-mup/timeline-of-evaluation-of-mup