



Monitoring and Evaluating Scotland's Alcohol Strategy (MESAS)

Analysis of alcohol sales data, 2005-2009

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Note to updated version

Data for the final quarter (October-December) of 2009 were not available at the time of the original publication. The 2009 estimates were therefore based upon the preceding 12 months (on-trade 01/10/08-30/09/09, off-trade 05/10/08-03/10/09). To enhance comparability, the 2008 estimates were based upon the same time period (on-trade 01/10/07-30/09/08, off-trade 07/10/07-04/10/08). This update revises the estimates based upon data for the full calendar years 2008 and 2009.

Estimates for 2005 to 2007 may differ slightly from the original publication due to slight alterations in the coding of beer, cider and light wine by The Nielsen Company.



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Introduction

The following results are based upon industry sales data purchased from The Nielsen Company and CGA Strategy, and analysed by NHS Health Scotland.

There are 3 sections to this report:

Section 1: Total alcohol sales (on- and off-trade sales combined) in 2009
(results for Scotland, England & Wales and Great Britain)

Section 2: Total alcohol sales (on- and off-trade sales combined) from 2005 to 2009
(results for Scotland and England & Wales)

Section 3: On- and off-trade sales of alcohol from 2005 to 2009
(results for Scotland and England & Wales)

Notes to results

1. Alcohol sales data are estimates based on a sample of on- and off-trade outlets.
2. An alcoholic beverage is a drink that contains ethanol, also known as pure alcohol. In line with international convention, this report describes alcohol sales in terms of the volume of pure alcohol sold, irrespective of the type of alcoholic beverage. In addition, a system of units of alcohol exists as a guideline for consumption of alcoholic beverages. A unit of alcohol is defined as 10 millilitres of pure alcohol.
3. The 2009 population figure for England and Wales, used to calculate results per person, is based on a projection as the mid-year estimate has not yet been published.
4. Time trend graphs illustrate results for Scotland and England & Wales only. We excluded GB as the GB time trends follow that for England & Wales and therefore provide little additional information.

SECTION 1

Total alcohol sales (on- and off-trade sales combined) in 2009

KEY POINTS

- 50.9 million litres of pure alcohol were sold in Scotland in 2009.
- 11.9 litres of pure alcohol were sold per person aged 16 and over, 2.3 litres (24%) higher than in England and Wales (9.6 litres). **(Figure 1.1; Appendix 1)** When only those who drink alcohol are considered – using estimates from the Scottish Health Survey (SHeS) and Health Survey for England (HSfE) - this increases to 13.5 litres per person in Scotland, compared with 11.1 litres in England and Wales. **(Appendix 1)**
- 12.3 litres of pure alcohol were sold per person aged 18 and over, 2.4 litres (24%) higher than in England and Wales (9.9 litres). **(Figure 1.2; Appendix 1)** When only those who drink alcohol are considered – using estimates from the SHeS and HSfE - this increases to 13.9 litres per person in Scotland, compared with 11.5 litres in England and Wales. **(Appendix 1)**
- 1190 units of pure alcohol were sold per person aged 16 and over in Scotland in 2009, an average of 22.9 units per person per week. This was 4.5 units (24%) higher than in England and Wales (18.4 units). When only those who drink alcohol are considered – using estimates from the SHeS and HSfE - this increases to 25.9 units a week in Scotland, compared with 21.4 units in England and Wales. **(Figures 1.3 & 1.4; Appendix 1)**
- 1227 units of pure alcohol were sold per person aged 18 and over in Scotland in 2009, an average of 23.6 units per person per week. This was 4.6 units (24%) higher than in England and Wales (19.0 units). When only those who drink alcohol are considered – using estimates from the SHeS and HSfE - this increases to 26.7 units a week in Scotland, compared with 22.1 units in England and Wales. **(Figures 1.5 & 1.6; Appendix 1)**
- The average price per unit of alcohol in Scotland in 2009 was £0.72, almost identical to the figure in England and Wales (£0.71). **(Figure 1.7; Appendix 1)**

Figure 1.1: Sales of pure alcohol per person (aged 16+, 2009)

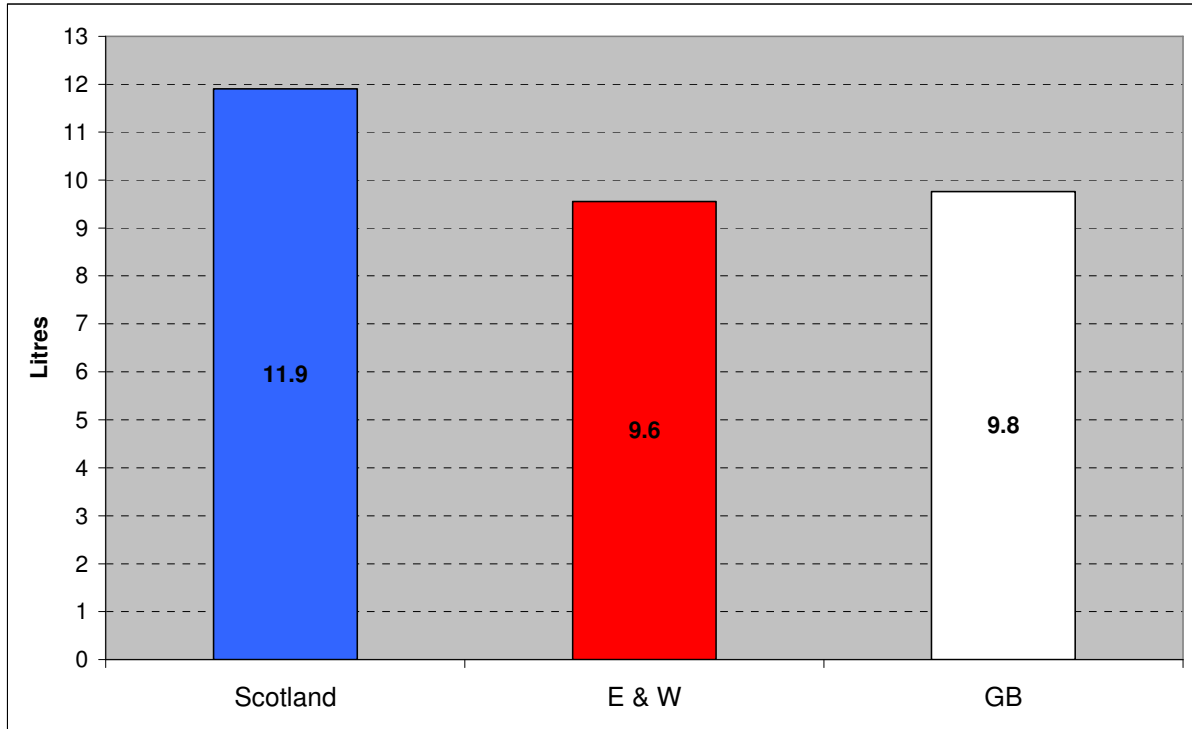


Figure 1.2: Sales of pure alcohol per person (aged 18+, 2009)

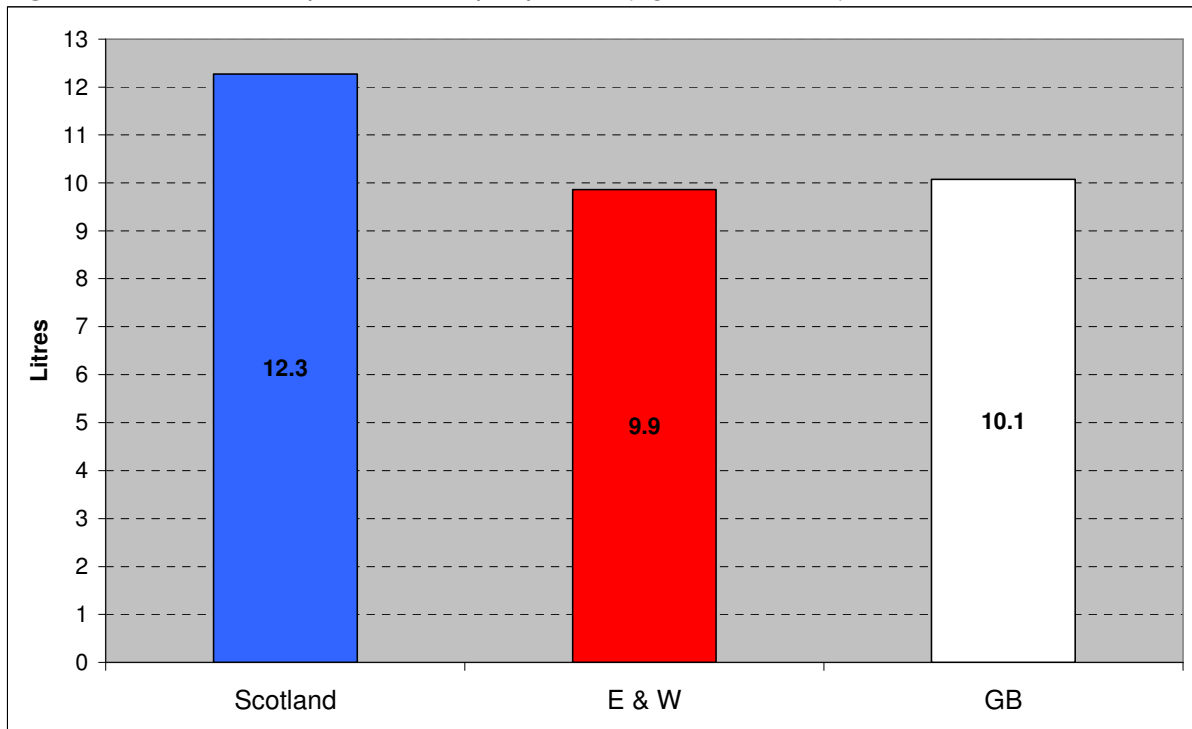


Figure 1.3: Sales of alcohol units, on average, per person per week (aged 16+, 2009)

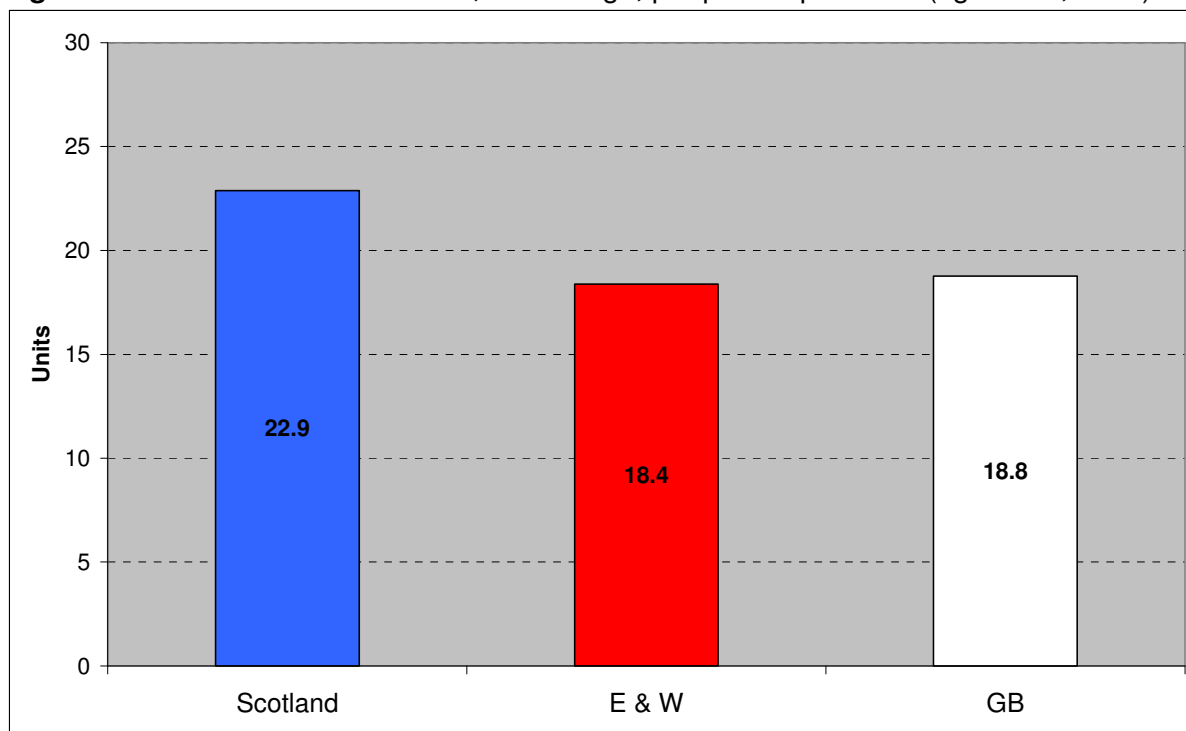
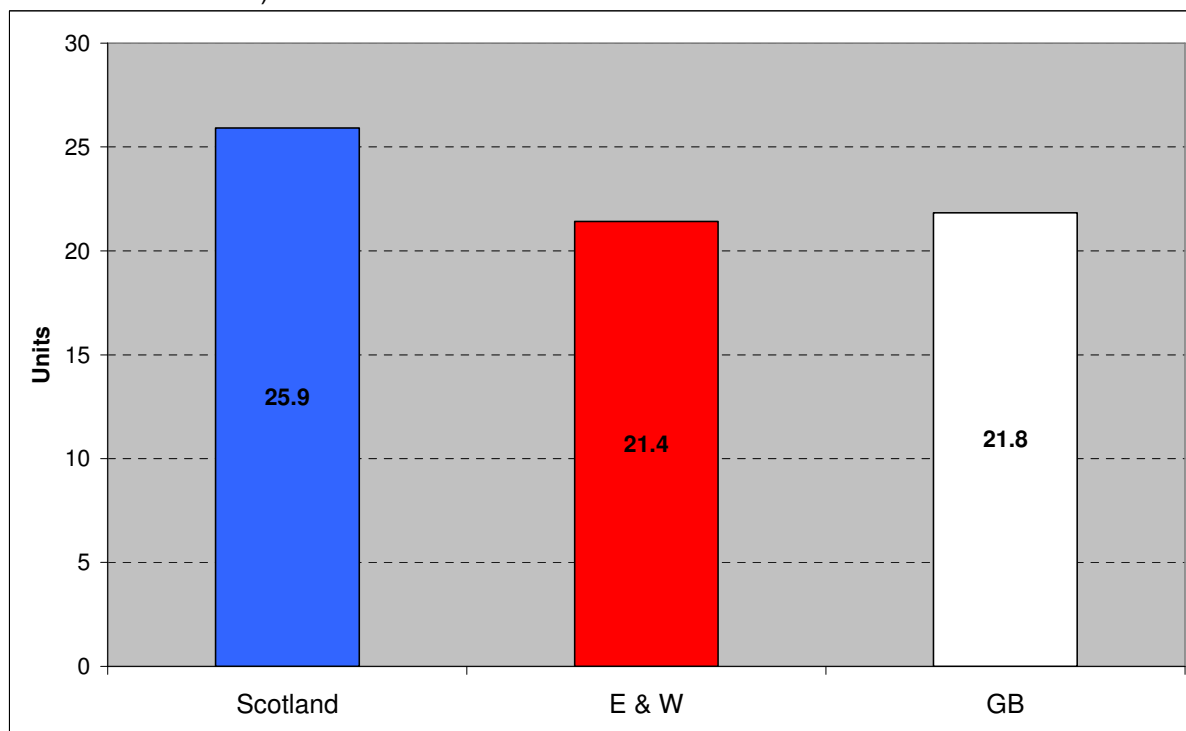


Figure 1.4: Sales of alcohol units, on average, per person per week (drinkers* aged 16+, 2009)



*The population of alcohol drinkers was calculated by subtracting non-alcohol drinkers (Scotland, 11.7%; England & Wales, 14.2%) from the total population (Sources: Scottish Health Survey, 2008; Health Survey for England, 2006).

Figure 1.5: Sales of alcohol units, on average, per person per week (aged 18+, 2009)

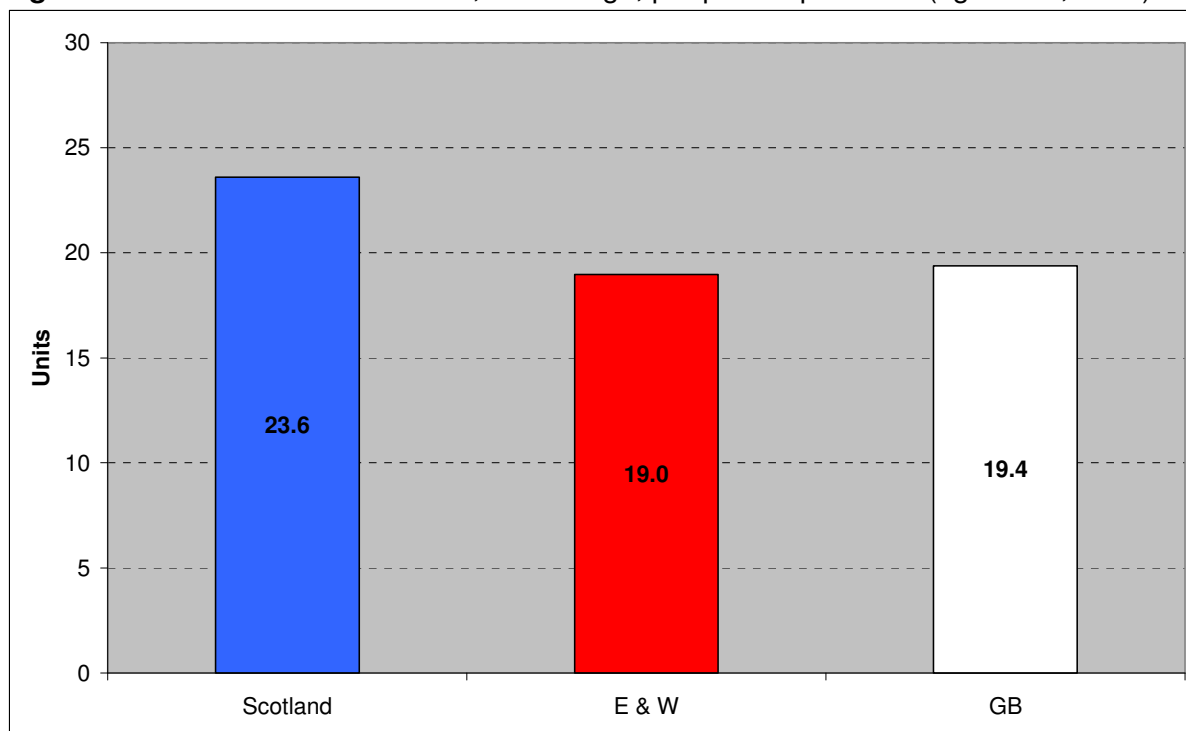
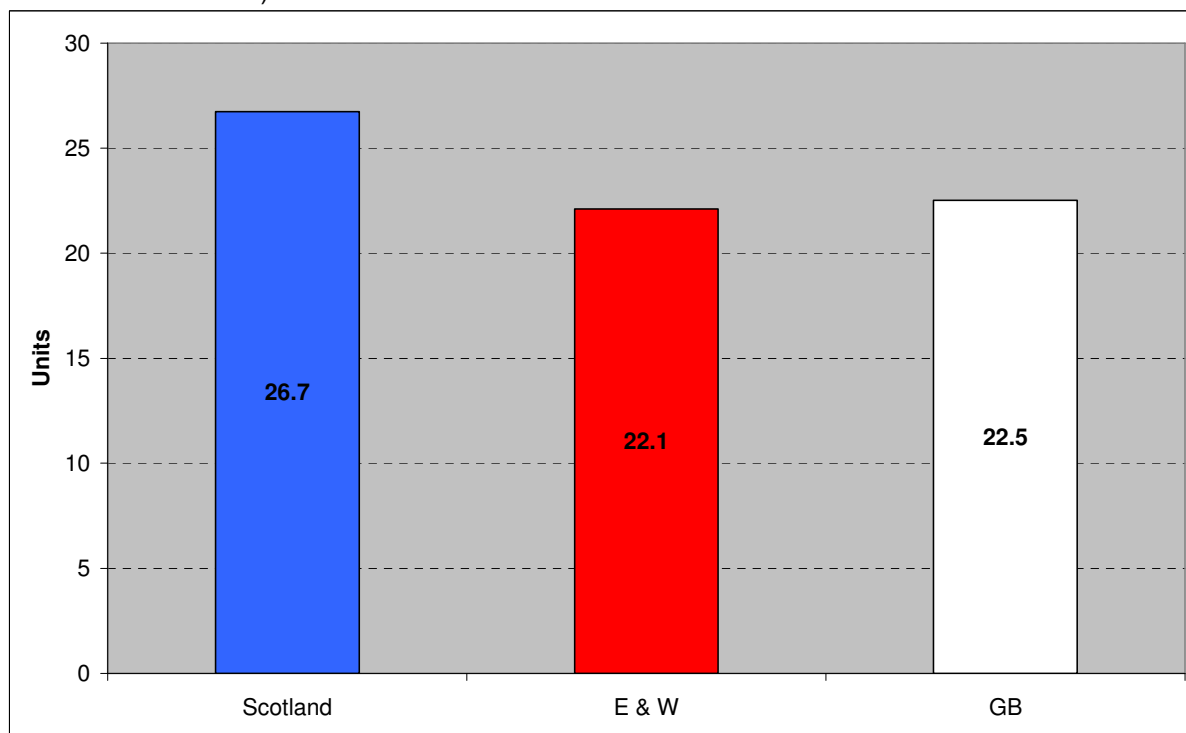
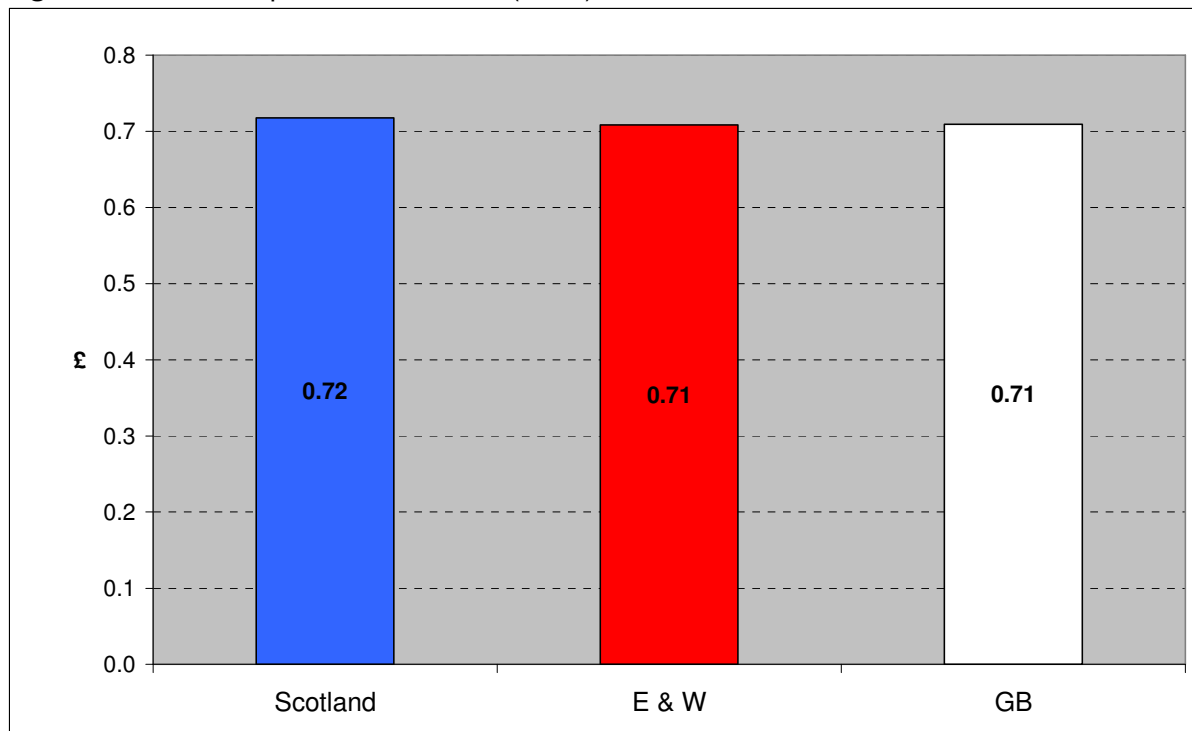


Figure 1.6: Sales of alcohol units, on average, per person per week (drinkers* aged 18+, 2009)



*The population of alcohol drinkers was calculated by subtracting non-alcohol drinkers (Scotland, 11.7%; England & Wales, 14.2%) from the total population (Sources: Scottish Health Survey, 2008; Health Survey for England, 2006).

Figure 1.7: Price per unit of alcohol (2009)



SECTION 2

Total alcohol sales (on- and off-trade sales combined) from 2005 to 2009

KEY POINTS

- The volume of pure alcohol sold per person (aged 16 and over) in Scotland has remained broadly stable over the past five years (2005=12.0 litres; 2009=11.9 litres). In contrast, the volume of pure alcohol sold per person (aged 16 and over) in England and Wales has decreased slightly every year between 2005 and 2009 (2005=10.2 litres; 2009=9.6 litres). The gap between Scotland and the rest of Great Britain has therefore widened (2005=1.8 litres; 2009=2.3 litres). These trends are similar for adults aged 18 and over. (**Figures 2.1 & 2.2; Appendix 1**)
- Sales of alcohol units in Scotland have remained broadly stable over the past five years. In 2005, 1198 alcohol units were sold per person aged 16 and over, an average of 23.0 units per person per week, compared with 22.9 units in 2009. In contrast, sales of alcohol units in England and Wales have decreased slightly every year between 2005 and 2009 (2005=19.6 units; 2009=18.4 units). The gap between Scotland and the rest of Great Britain has therefore widened (2005=3.4 units; 2009=4.5 units). These trends are similar for adults aged 18 and over. (**Figures 2.3 & 2.4; Appendix 1**)
- There has been a slight but steady increase in the price per unit of alcohol in Scotland over the past five years (2005=£0.67; 2009=£0.72) with similar increases in England and Wales (2005=£0.67; 2009=£0.71). (**Figure 2.5; Appendix 1**)

Figure 2.1: Sales of pure alcohol per person (aged 16+, 2005-2009)

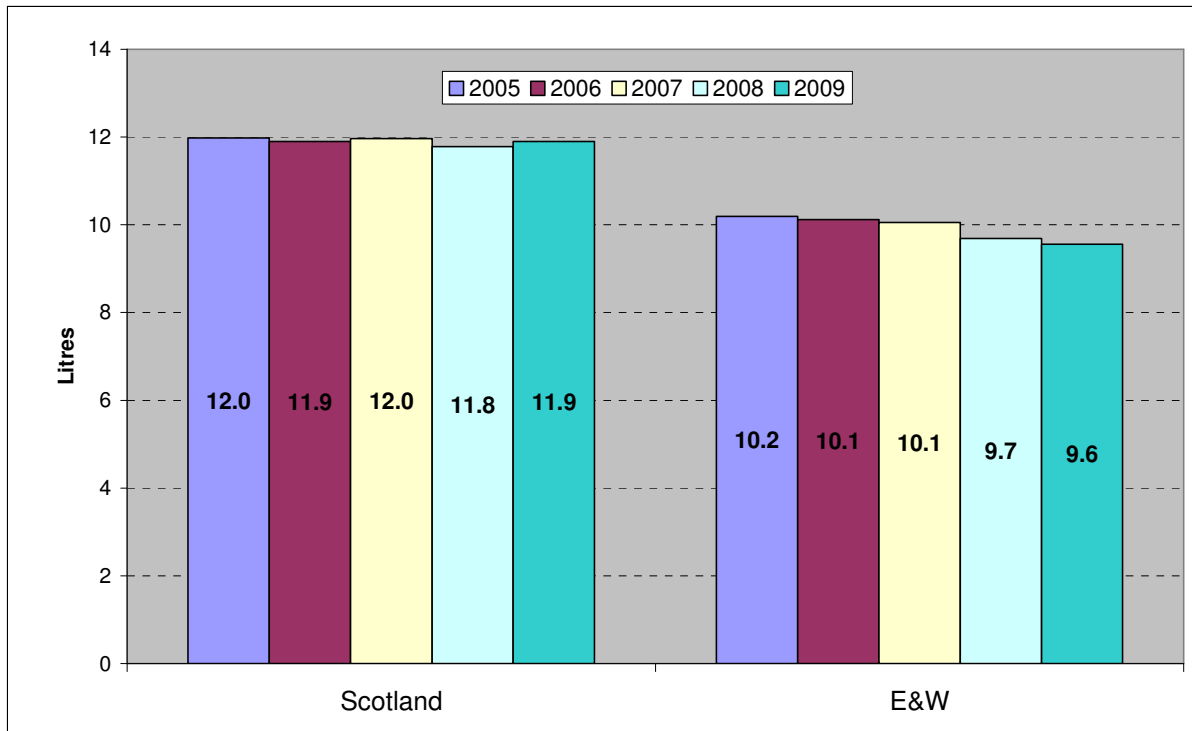


Figure 2.2: Sales of pure alcohol per person (aged 18+, 2005-2009)

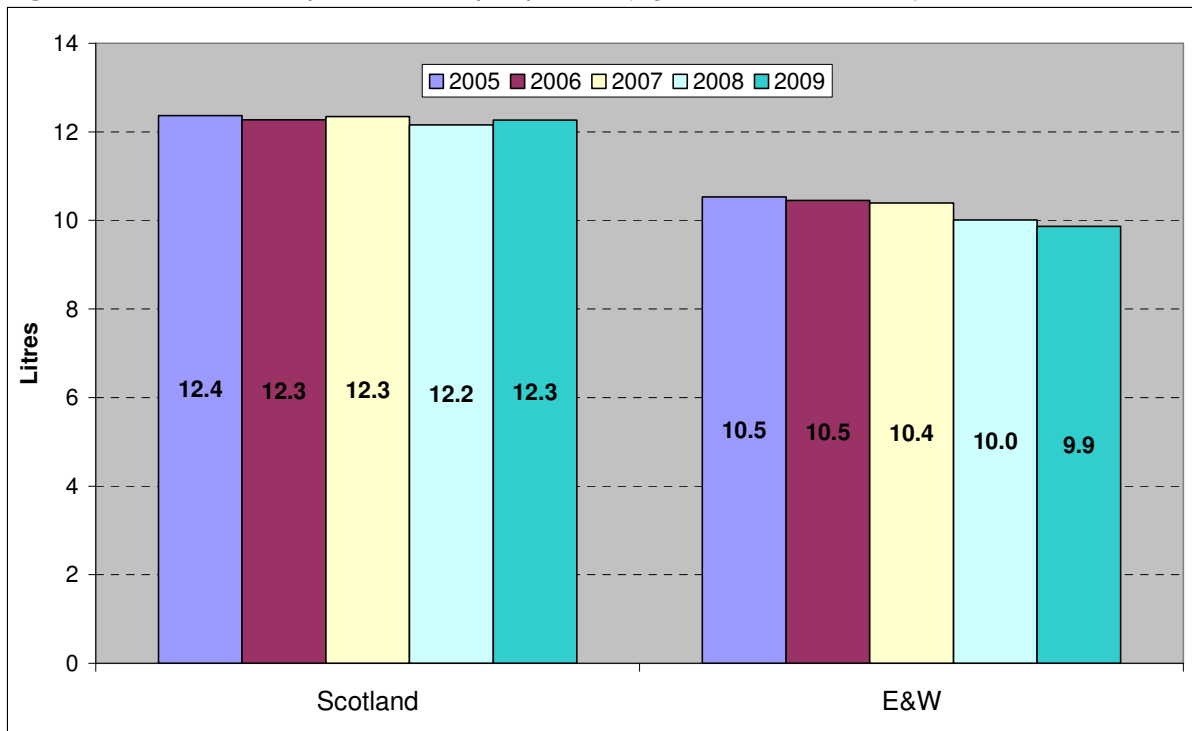


Figure 2.3: Sales of alcohol units, on average, per person per week (aged 16+, 2005-2009)

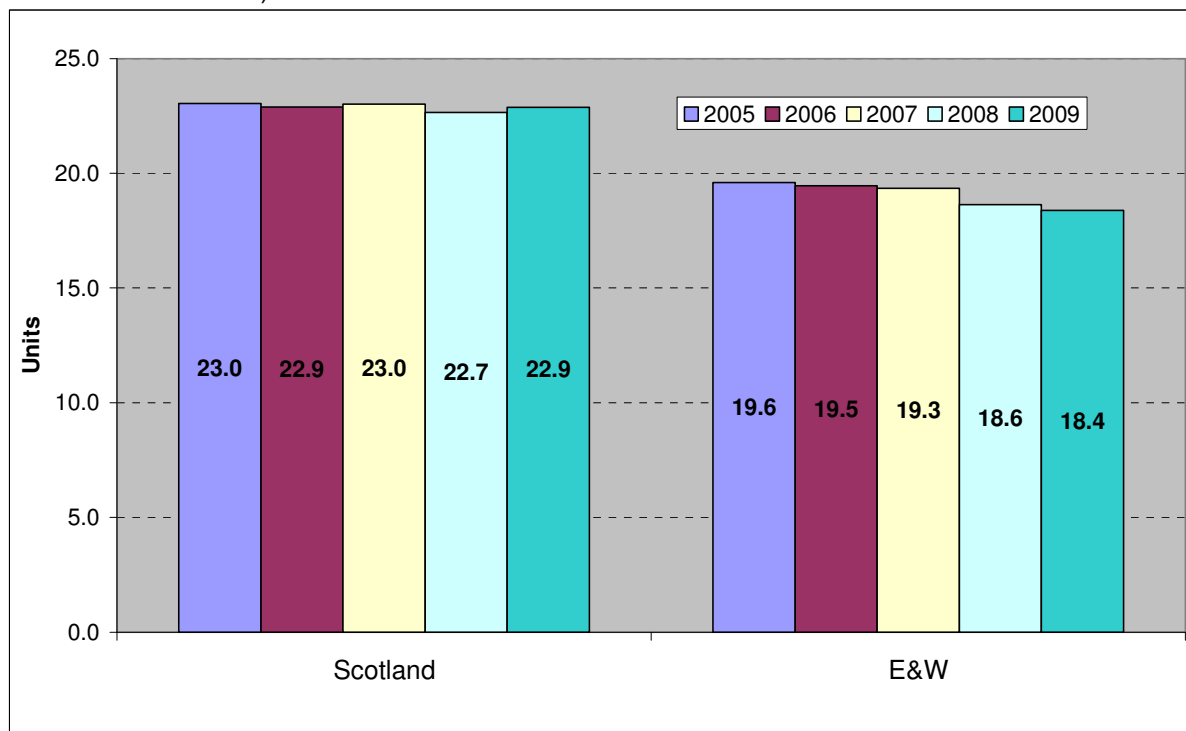


Figure 2.4: Sales of alcohol units, on average, per person per week (aged 18+, 2005-2009)

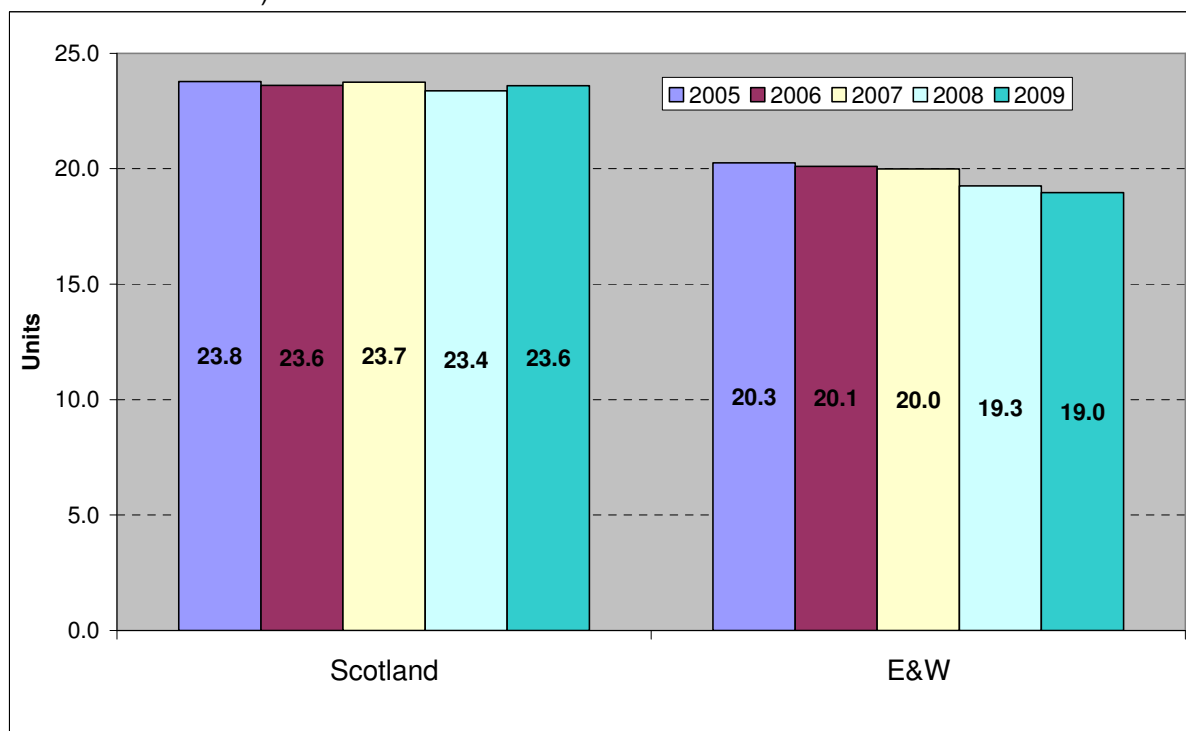
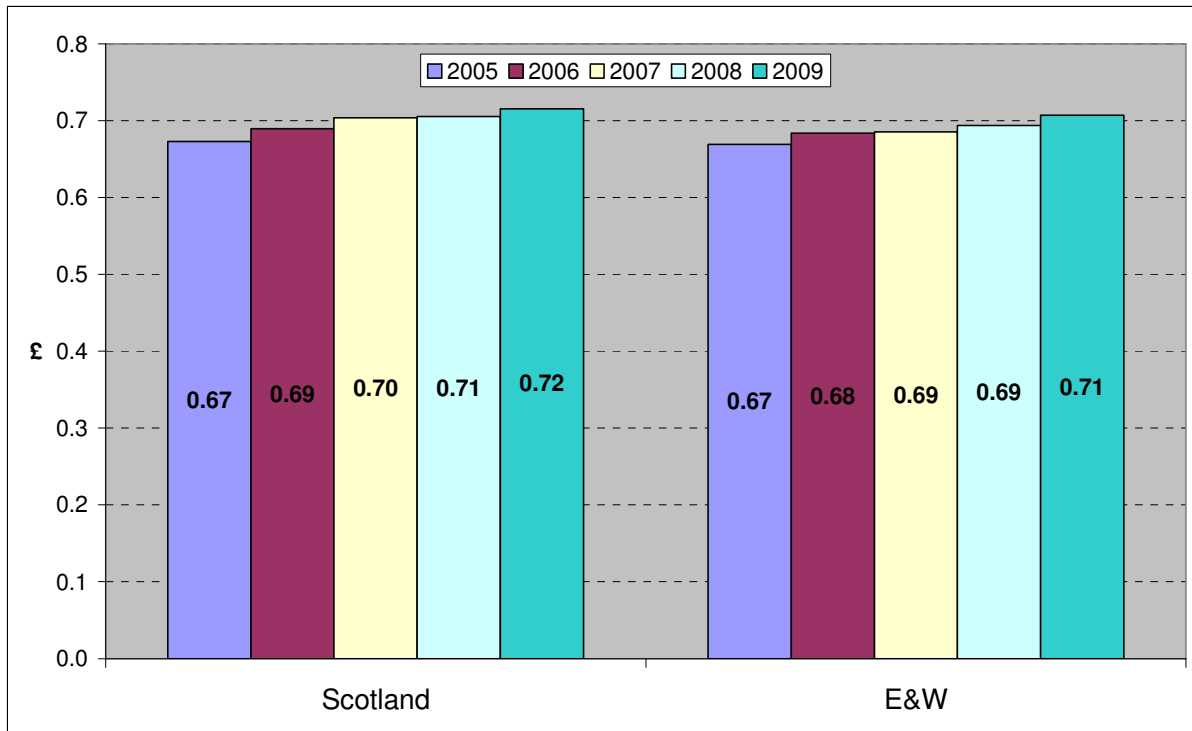


Figure 2.5: Price per unit of alcohol (2005-2009)



SECTION 3

On- and off-trade sales of alcohol from 2005 to 2009

KEY POINTS

- Figures regarding on-trade and off-trade sales of alcohol in Scotland suggest a clear change in purchasing patterns over the past five years.
- Off-trade sales of pure alcohol per person aged 16 and over in Scotland have increased by 0.6 litres over the past five years, from 7.4 litres in 2005 to 8.0 litres in 2009. Conversely, on-trade sales decreased by 0.7 litres, from 4.6 litres in 2005 to 3.9 litres in 2009. In 2009, the volume of alcohol purchased off-trade per person was, therefore, more than double that purchased on-trade. In England and Wales, there has been a similar downward trend in on-trade alcohol sales; however, unlike Scotland, off-trade sales increased only slightly by 0.3 litres per person, from 6.1 in litres 2005 to 6.4 litres in 2009, remaining relatively stable since 2007. These trends are similar for adults aged 18 and over. **(Figure 3.1 & 3.2; Appendix 2)**
- On average, off-trade sales of alcohol in Scotland increased by 1.3 units (9%) per person (aged 16 and over) per week over the past five years, from 14.2 units in 2005 to 15.5 units in 2009. Conversely, on-trade sales decreased by 1.5 units (17%), from 8.9 units in 2005 to 7.4 units in 2009. In England and Wales, there has been a similar trend for a decrease in on-trade alcohol sales; however, unlike Scotland, off-trade sales increased only slightly by 0.5 units (4%) per person per week, from 11.8 units in 2005 to 12.3 units in 2009, remaining stable since 2007. These trends are similar for adults aged 18 and over. **(Figure 3.3 & 3.4; Appendix 2)**
- On average, over one more unit of alcohol was purchased off-trade per person (aged 16 and over) per week in Scotland in 2009 (15.5 units) compared with 2005 (14.2 units). In England and Wales, there has been an increase of only 0.5 units over the same time period (2005=11.8 units; 2009=12.3 units) with virtually no change being observed since 2007. These trends are similar for adults aged 18 and over. **(Figure 3.3 & 3.4; Appendix 2)**
- The average price per unit of alcohol sold on-trade in Scotland increased by 17% over the past five years, from £1.12 per unit in 2005 to £1.31 per unit in 2009. This 19 pence increase was considerably higher than the off-trade increase of only 4 pence (10%) over the same five year period, from 39 pence per unit in 2005 to 43 pence in 2009. There were similar changes in England and Wales. **(Figure 3.5; Appendix 2)**

Figure 3.1: On- and off-trade sales of pure alcohol per person (aged 16+, 2005-09)

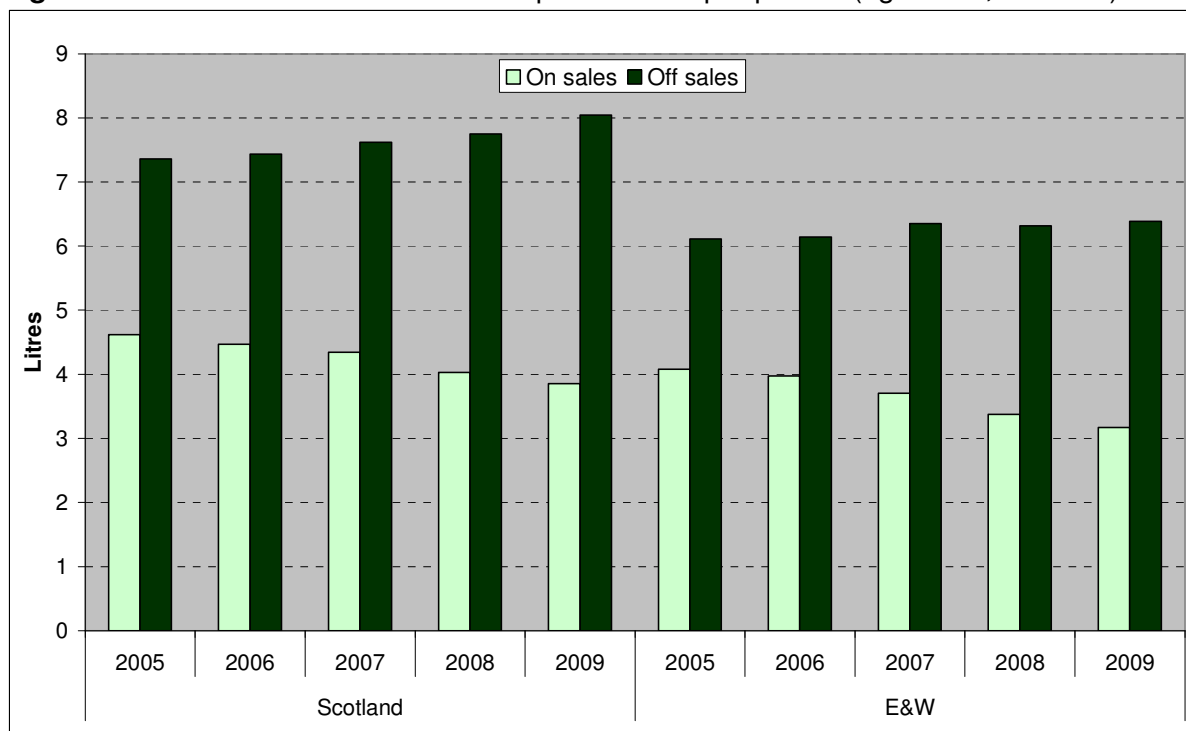


Figure 3.2: On- and off-trade sales of pure alcohol per person (aged 18+, 2005-09)

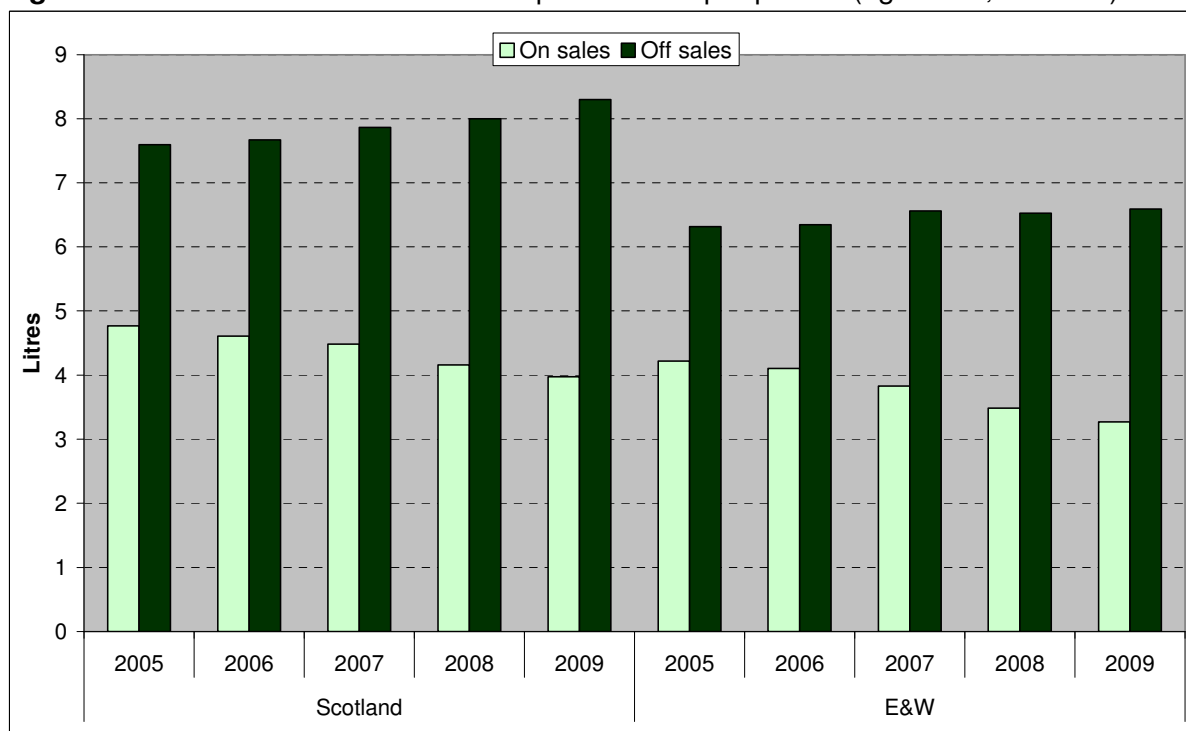


Figure 3.3: On- and off-trade sales of alcohol units, on average, per person per week (aged 16+, 2005-2009)

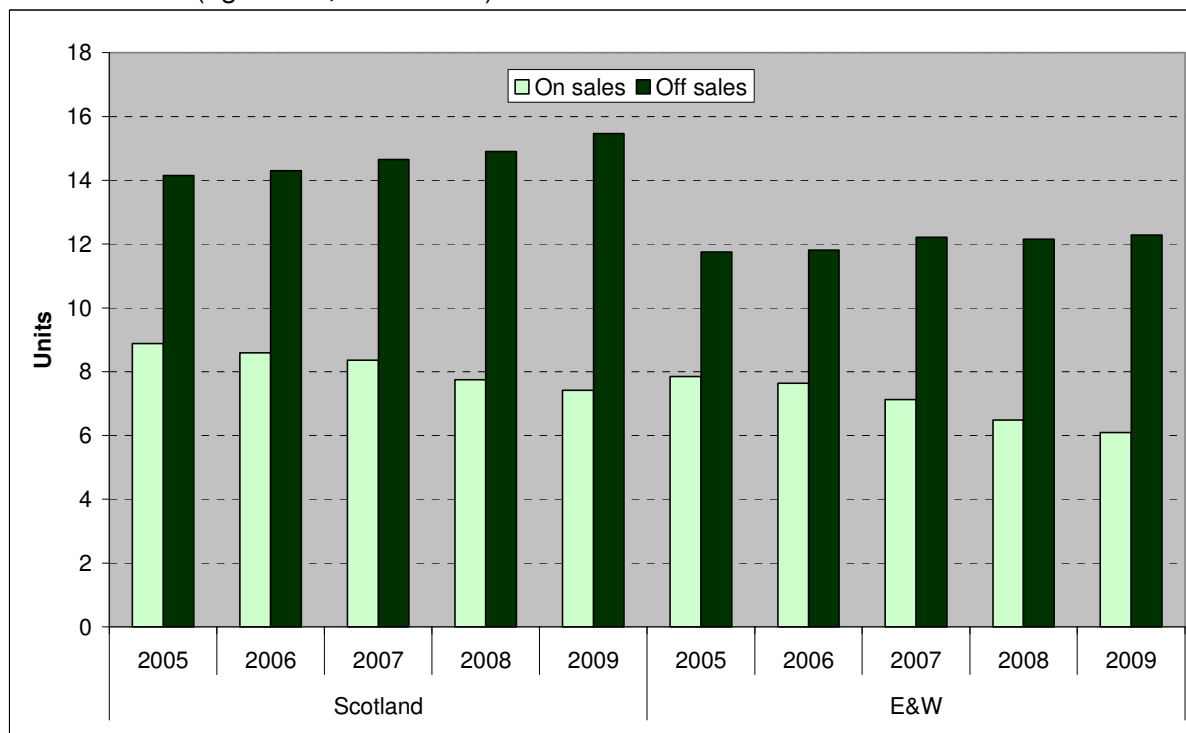


Figure 3.4: On- and off-trade sales of alcohol units, on average, per person per week (aged 18+, 2005-2009)

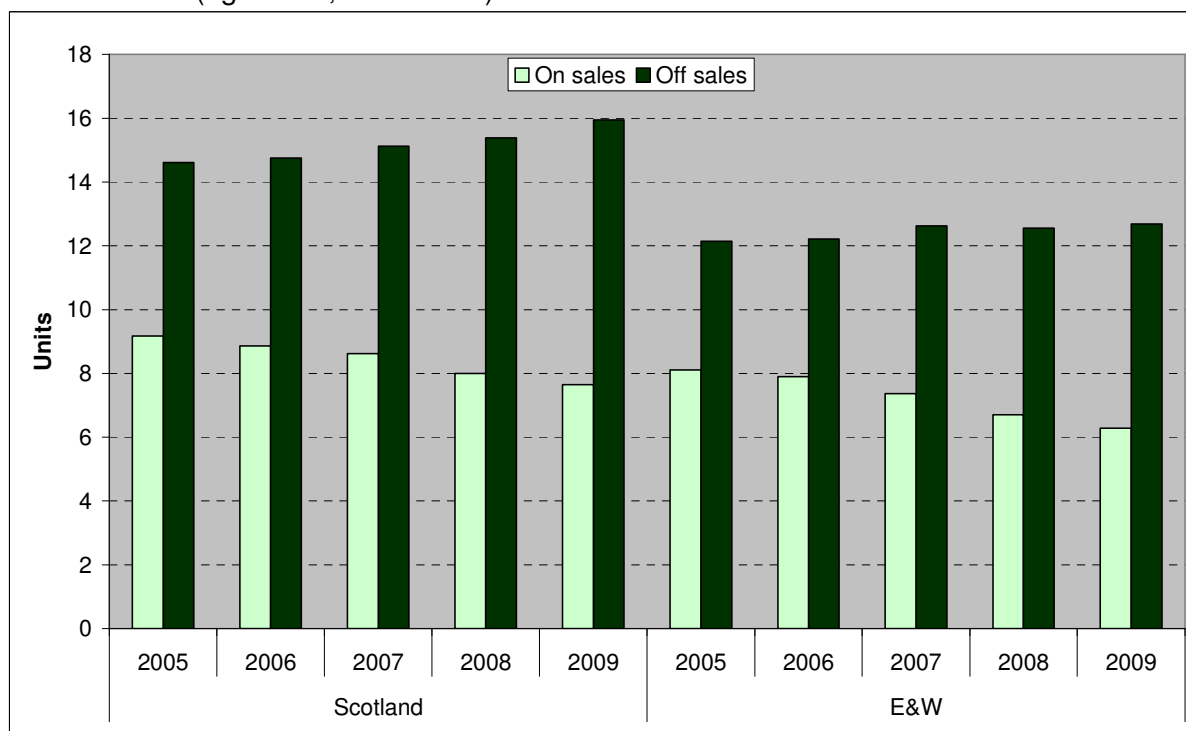
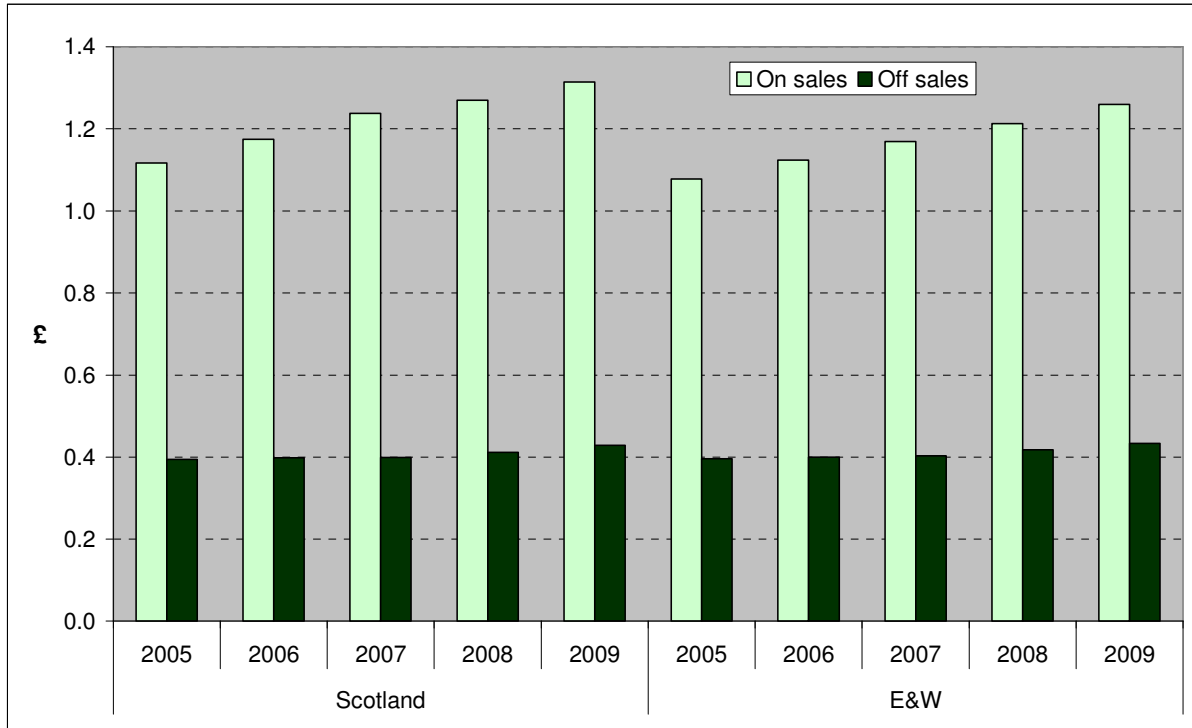


Figure 3.5: Price per unit of on- and off-trade sales of pure alcohol (2005-2009)



Appendix 1 Total alcohol sales (on- and off-trade sales combined) in Scotland, England & Wales and Great Britain, 2005-2009

	2005	2006	2007	2008	2009
Scotland					
Sales of pure alcohol per person (aged 16+) [Litres]	12.0	11.9	12.0	11.8	11.9
Sales of pure alcohol per person (drinkers* aged 16+) [Litres]	-	-	-	13.3	13.5
Sales of pure alcohol per person (aged 18+) [Litres]	12.4	12.3	12.3	12.2	12.3
Sales of pure alcohol per person (drinkers* aged 18+) [Litres]	-	-	-	13.8	13.9
Sales of alcohol units, on average, per person per week (aged 16+) [units]	23.0	22.9	23.0	22.7	22.9
Sales of alcohol units, on average, per person per week (drinkers* aged 16+) [units]	-	-	-	25.7	25.9
Sales of alcohol units, on average, per person per week (aged 18+) [units]	23.8	23.6	23.7	23.4	23.6
Sales of alcohol units, on average, per person per week (drinkers* aged 18+) [units]	-	-	-	26.5	26.7
Price per unit of alcohol [£]	0.67	0.69	0.70	0.71	0.72
England & Wales					
Sales of pure alcohol per person (aged 16+) [Litres]	10.2	10.1	10.1	9.7	9.6
Sales of pure alcohol per person (drinkers* aged 16+) [Litres]	-	-	-	11.3	11.1
Sales of pure alcohol per person (aged 18+) [Litres]	10.5	10.5	10.4	10.0	9.9
Sales of pure alcohol per person (drinkers* aged 18+) [Litres]	-	-	-	11.7	11.5
Sales of alcohol units, on average, per person per week (aged 16+) [units]	19.6	19.5	19.3	18.6	18.4
Sales of alcohol units, on average, per person per week (drinkers* aged 16+) [units]	-	-	-	21.7	21.4
Sales of alcohol units, on average, per person per week (aged 18+) [units]	20.3	20.1	20.0	19.3	19.0
Sales of alcohol units, on average, per person per week (drinkers* aged 18+) [units]	-	-	-	22.4	22.1
Price per unit of alcohol [£]	0.67	0.68	0.69	0.69	0.71
Great Britain					
Sales of pure alcohol per person (aged 16+) [Litres]	10.3	10.3	10.2	9.9	9.8
Sales of pure alcohol per person (drinkers* aged 16+) [Litres]	-	-	-	11.5	11.3
Sales of pure alcohol per person (aged 18+) [Litres]	10.7	10.6	10.6	10.2	10.1
Sales of pure alcohol per person (drinkers* aged 18+) [Litres]	-	-	-	11.9	11.7
Sales of alcohol units, on average, per person per week (aged 16+) [units]	19.9	19.8	19.7	19.0	18.8
Sales of alcohol units, on average, per person per week (drinkers* aged 16+) [units]	-	-	-	22.1	21.8
Sales of alcohol units, on average, per person per week (aged 18+) [units]	20.6	20.4	20.3	19.6	19.4
Sales of alcohol units, on average, per person per week (drinkers* aged 18+) [units]	-	-	-	22.8	22.5
Price per unit of alcohol [£]	0.67	0.68	0.69	0.70	0.71

* The population of alcohol drinkers was calculated by subtracting non-alcohol drinkers (Scotland, 11.7%; England & Wales, 14.2%) from the total population (Sources: Scottish Health Survey, 2008; Health Survey for England, 2006).

Appendix 2 On- and off-trade sales of alcohol in Scotland and England & Wales, 2005-2009

	2005	2006	2007	2008	2009
Scotland					
On-trade sales of pure alcohol per person (aged 16+ [Litres])	4.6	4.5	4.3	4.0	3.9
On-trade sales of pure alcohol per person (drinkers* aged 16+ [Litres])	-	-	-	4.6	4.4
Off-trade sales of pure alcohol per person (aged 16+) [Litres]	7.4	7.4	7.6	7.7	8.0
Off-trade sales of pure alcohol per person (drinkers* aged 16+) [Litres]	-	-	-	8.8	9.1
On-trade sales of pure alcohol per person (aged 18+) [Litres]	4.8	4.6	4.5	4.2	4.0
On-trade sales of pure alcohol per person (drinkers* aged 18+) [Litres]	-	-	-	4.7	4.5
Off-trade sales of pure alcohol per person (aged 18+) [Litres]	7.6	7.7	7.9	8.0	8.3
Off-trade sales of pure alcohol per person (drinkers* aged 18+) [Litres]	-	-	-	9.1	9.4
On-trade sales of alcohol units, on average, per person per week (aged 16+) [units]	8.9	8.6	8.4	7.7	7.4
On-trade sales of alcohol units, on average, per person per week (drinkers* aged 16+) [units]	-	-	-	8.8	8.4
Off-trade sales of alcohol units, on average, per person per week (aged 16+) [units]	14.2	14.3	14.7	14.9	15.5
Off-trade sales of alcohol units, on average, per person per week (drinkers* aged 16+) [units]	-	-	-	16.9	17.5
On-trade sales of alcohol units, on average, per person per week (aged 18+) [units]	9.2	8.9	8.6	8.0	7.6
On-trade sales of alcohol units, on average, per person per week (drinkers* aged 18+) [units]	-	-	-	9.1	8.7
Off-trade sales of alcohol units, on average, per person per week (aged 18+) [units]	14.6	14.7	15.1	15.4	16.0
Off-trade sales of alcohol units, on average, per person per week (drinkers* aged 18+) [units]	-	-	-	17.4	18.1
Price per unit of alcohol on-trade [£]	1.12	1.17	1.24	1.27	1.31
Price per unit of alcohol off-trade [£]	0.39	0.40	0.40	0.41	0.43
England & Wales					
On-trade sales of pure alcohol per person (aged 16+ [Litres])	4.1	4.0	3.7	3.4	3.2
On-trade sales of pure alcohol per person (drinkers* aged 16+ [Litres])	-	-	-	3.9	3.7
Off-trade sales of pure alcohol per person (aged 16+) [Litres]	6.1	6.1	6.4	6.3	6.4
Off-trade sales of pure alcohol per person (drinkers* aged 16+) [Litres]	-	-	-	7.4	7.4
On-trade sales of pure alcohol per person (aged 18+) [Litres]	4.2	4.1	3.8	3.5	3.3
On-trade sales of pure alcohol per person (drinkers* aged 18+) [Litres]	-	-	-	4.1	3.8
Off-trade sales of pure alcohol per person (aged 18+) [Litres]	6.3	6.3	6.6	6.5	6.6
Off-trade sales of pure alcohol per person (drinkers* aged 18+) [Litres]	-	-	-	7.6	7.7
On-trade sales of alcohol units, on average, per person per week (aged 16+) [units]	7.8	7.6	7.1	6.5	6.1
On-trade sales of alcohol units, on average, per person per week (drinkers* aged 16+) [units]	-	-	-	7.6	7.1
Off-trade sales of alcohol units, on average, per person per week (aged 16+) [units]	11.8	11.8	12.2	12.2	12.3
Off-trade sales of alcohol units, on average, per person per week (drinkers* aged 16+) [units]	-	-	-	14.2	14.3
On-trade sales of alcohol units, on average, per person per week (aged 18+) [units]	8.1	7.9	7.4	6.7	6.3
On-trade sales of alcohol units, on average, per person per week (drinkers* aged 18+) [units]	-	-	-	7.8	7.3
Off-trade sales of alcohol units, on average, per person per week (aged 18+) [units]	12.1	12.2	12.6	12.6	12.7
Off-trade sales of alcohol units, on average, per person per week (drinkers* aged 18+) [units]	-	-	-	14.6	14.8
Price per unit of alcohol on-trade [£]	1.08	1.12	1.17	1.21	1.26
Price per unit of alcohol off-trade [£]	0.40	0.40	0.40	0.42	0.43

* The population of alcohol drinkers was calculated by subtracting non-alcohol drinkers (Scotland, 11.7%; England & Wales, 14.2%) from the total population (Sources: Scottish Health Survey, 2008; Health Survey for England, 2006).