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Welsh Government

RESEARCH, DOCUMENT

Assessing the impact of minimum pricing for alcohol on the wider population of drinkers: summary

This report presents results from the fourth and final wave of a longitudinal study assessing the impact of Minimum Pricing for Alcohol (MPA) on the wider population of drinkers in Wales. The research was conducted by researchers from the University of South Wales in collaboration with researchers from Wrexham University and Figure 8 Consultancy.

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Research aims and methodology

This report presents results from the fourth and final wave of a longitudinal study assessing the impact of Minimum Pricing for Alcohol (MPA) on the wider population of drinkers in Wales. The research was conducted by researchers from the University of South Wales in collaboration with researchers from Wrexham University and Figure 8 Consultancy.

This final report is based on data collected 42 months post-implementation of MPA using two research methods: (1) a cross-sectional, anonymous, online questionnaire survey of adult drinkers living in Wales; and (2) qualitative interviews with adult drinkers living in Wales.

Key themes investigated in the survey and interviews included: awareness of MPA; changes in drinking patterns and related behaviours; and views on other ways of reducing alcohol-related harm in Wales. Of particular importance for this final wave of data collection were questions exploring attitudes towards MPA, views on its effectiveness, and thoughts about its future in Wales.

One-hundred and eighty-one drinkers completed the post-implementation cross-sectional questionnaire survey, which is similar to that achieved at the two-year follow-up (n=186). The survey respondents were recruited through networks of contacts and sharing a link to the survey on social media.

Interviews were conducted with 34 people who had consumed alcohol in the period since MPA had been introduced. Interviewees were recruited through the National Survey for Wales, the cross-sectional survey, and through a third sector organisation providing housing support in South Wales. Fifteen people were interviewed on four occasions (i.e., at baseline, 9, 24 and 42-months post-implementation of MPA).

The research focused on current drinkers aged 18 or over who were resident in

Wales. Both the longitudinal interview sample and the cross-sectional survey sample included drinkers from across different parts of Wales who varied in terms of their socio-demographic characteristics and drinking patterns.

Some demographic groups were more heavily represented than others (e.g., more men than women completed the survey, and most members of the survey and interview samples defined themselves as White – English, Scottish, Welsh, Northern Irish, British).

Background and context

MPA involves setting a minimum price below which alcohol cannot legally be sold or supplied.

In Wales, the Public Health (Minimum Price for Alcohol)(Wales) Act 2018, enabled the introduction of minimum pricing for alcohol on public health grounds, an area within the (then) National Assembly for Wales' legislative competence.

The Act places a duty on Welsh Ministers to lay a report on the operation and effect of the legislation before the Welsh Parliament at the end of a five-year review period. The results of that report will play an important role in determining whether regulations are made to provide for the continuation of MPA beyond its current six-year lifespan.

To inform the report on the operation and effect, the Welsh Government has commissioned an evaluation of the legislation over a five-year period. This report forms part of that evaluation and is the last of three 'post-implementation' reports that examine alcohol consumption patterns and related behaviours among moderate, hazardous, and harmful drinkers within the general population of Wales.

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Main findings

Awareness of MPA and its implementation

In line with findings from our previous reports, most participants were aware of MPA, but a significant minority were not. This tends to suggest either publicity about MPA has not been as extensive as it could have been or that some people had simply not noticed it. However, the lack of awareness is to some extent understandable given MPA was introduced at the height of the COVID-19 pandemic at a time of enormous stress and significant change.

Awareness was more likely among lower and increasing risk drinkers than higher risk drinkers. Those who were aware of MPA varied in terms of their level of understanding of the policy, with some having only a vague understanding and others a more comprehensive knowledge.

Those who were aware of MPA described learning about it through a variety of sources including television (news reports), radio, social media, and other online sources. Given the amount of time that has passed since MPA was introduced (including a time of significant upheaval during the COVID-19 pandemic), it was not surprising to find some participants could not remember how they had first heard about it.

Most people had noticed an increase in the price of alcohol since the introduction of MPA. Those who had not noticed anything indicated this was because their drink of choice was not affected by MPA, or because they did not purchase alcohol often enough to notice any changes. When changes were noticed this was often in relation to the price of strong ciders, although some changes were also noted in the price of strong lagers, spirits, and wine.

The change in price was attributed by some to MPA, but also to inflation and the cost-of-living crisis, which was causing an increase in the price of everything.

The competing effect of COVID-19 and routine variations in alcohol prices were flagged as confounding factors impacting on the visibility and effectiveness of MPA.

Some drinkers noted cheaper prices and better value offers and discounts on alcohol in England than Wales, attributing the difference to MPA. Few participants noted any change in the availability of alcohol products, although some had spotted changes in the size and strength of various products, particularly cider.

Changes in alcohol consumption and related behaviours

Roughly half of survey respondents reported drinking at the same frequency and quantity as they had before MPA had been implemented. When changes were noted, these were more commonly decreases than increases.

Some drinkers noted the absence of offers and discounts in Wales that were still available in England, and some responded to this price differential by travelling to England to buy alcohol at cheaper prices.

Interviewees explained that decreases in consumption were the result of a range of factors among which cost was a primary consideration. Other factors included lifestyle changes, physical and mental health issues, maturity and ageing, dietary needs, and social factors.

Increases in consumption were also linked to a variety of factors including increases in socialising (e.g., following the easing of COVID-19 protective measures), traumatic life events, boredom, and the stress of living in an unstable environment.

While most drinkers had made no changes to the type, brand, or social circumstances in which they consumed alcohol, a small proportion had done so,

and these were more common among higher-risk drinkers than other drinkers.

When changes were reported, the nature of the changes was mixed and included shifts towards wine and away from spirits among some drinkers and a shift away from cider towards spirits, among others. Some also reported an increase in the use of zero/low alcohol products, which were thought to be more available and better in quality than in the past.

MPA was just one factor among many that triggered changes in behaviours. Importantly, price was a clear driver in causing a shift from cider to spirits among higher risk drinkers.

Changes in household expenditure and purchasing patterns

Roughly half of survey respondents had experienced no change in the affordability of alcohol since March 2020. Those who had experienced a change were more likely to say it had become less affordable, which might be expected following the introduction of a minimum price and increases in the cost of living.

Most respondents reported not changing how much they were spending on alcohol. Interestingly, lower-risk drinkers were more likely to report alcohol becoming less affordable, possibly contributing to why they were more likely to have reduced the quantity and frequency of their use in the period since MPA had been introduced.

When changes in expenditure were reported, these were more commonly increases than decreases, mostly attributed to the increased price of alcohol. Some were able to afford the price increase, absorbing the increase in their household budgets. Others, particularly higher-risk drinkers, struggled but nevertheless continued drinking.

When decreases in expenditure were reported these were often attributed to reduced household income, although health-related factors were also mentioned.

When changes in location of alcohol purchasing were reported, this was most commonly a switch to buying alcohol in England, where it was cheaper due to the absence of MPA. The perceived negative impact of this on the Welsh economy and environment (due to pollution from driving) was highlighted by a small number of interviewees and respondents.

Other changes in purchasing included a shift away from the 'big four' supermarkets, and away from drinking out in pubs and restaurants to drinking at home.

Changes in the use of other substances

As predicted and described previously, few drinkers reported any changes in their use of a range other substances or their food consumption.

Most had not used illegal drugs prior to the introduction of MPA in Wales and had not started to do so in the period since March 2020. On the few occasions when changes were reported, these were among those with histories of use and included increases in heroin, crack, and cannabis use, which were understood to offer better value for money than alcohol.

A small number of drinkers reported changes in their use of prescription drugs and over-the-counter medication, which included increases (due to physical and mental health problems) and decreases (due to improved health).

Contrary to predictions, there was no clear evidence of drinkers substituting food consumption with alcohol. Where changes in food choices were reported, this was linked with the increased cost of living.

Changes in other drinkers

Few noticed any impact of MPA on the lives of drinkers they knew and when change was noted, it was often understood to result from the general increase in the cost of living. This meant fewer people going out to drink, and people drinking less when they did go out.

A small number reported witnessing drinkers switching from strong ciders to lager due to the cheaper price. Others noted their friends were drinking less than they used to, attributing this to a combination of factors including maturing, a change in lifestyle, and for health reasons.

Views on the effectiveness and future of MPA

Many people were unsure of the effectiveness of MPA in reducing alcohol-related harm, mainly as they had not seen any evidence to suggest it was effective. However, some recognised the impact varied among different types of drinkers while others suggested more time was needed for the effects to be felt and fully understood.

When opinions were expressed about the effectiveness of MPA, it was more often in a negative than positive direction. Negative views were commonly justified in terms of the perceived unfair impact of the policy on people with alcohol problems and on the poorest in society.

Those responding more positively focused on the belief increasing the price of alcohol had made it less affordable, and hence less accessible. The introduction of a wider range of better quality zero/low alcohol drinks was also noted as a positive effect of the policy.

Views on the continuation of MPA were mixed but again included a significant

proportion who were undecided or did not know what to think. This was again attributed to a lack of evidence regarding the effectiveness of MPA in Wales or because the policy did not affect them personally. Those who did express an opinion were split in terms of being in favour or against MPA remaining in place.

Those in favour of MPA remaining in force tended to focus on the health and social benefits of reducing alcohol consumption, although the need to increase revenue for support services for those with alcohol problems was also noted.

There was no common theme articulated by those opposing MPA being continued, with a range of reasons noted, including: the right to make personal choices without government intervention; concerns about the financial burden, particularly on those on lower incomes; and the potential negative impact of cross-border shopping on the Welsh economy.

Those in favour of reducing the MUP charged were concerned about the impact on people in low-income households and potential cross border shopping, while those in favour of it remaining at 50p argued there was a need for more evidence before making any changes.

Those who thought the MUP should be increased felt the impact of MPA had been eroded by inflation and increasing the price was necessary to maximise its impact. There were mixed views on whether the MUP should be increased very slightly to minimise the impact at a time where costs of everything have increased or significantly to maximise the impact on consumption.

Reducing alcohol-related harm

Increasing awareness of the MPA policy, including publicising messages about why it was introduced and how it has been implemented, was widely thought to be necessary to improve the effectiveness of the legislation.

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Some thought MPA might work more effectively if targeted towards particular types of alcoholic drink rather than all drinks, while others suggested increased revenue should be used to provide more support to people with alcohol problems rather than remaining with the alcohol industry, including retailers (<https://www.gov.walesnull>)^{[footnote 1} (<https://www.gov.wales#footnote-1>)[]]. Preventing cheaper imports of alcohol from England was also mentioned.

Five themes were established with reference to other initiatives to reduce alcohol-related harm more broadly:

- Raising awareness of the potential harm associated with alcohol consumption, including placing warning labels on packaging, launching publicity campaigns, improving substance misuse education in schools, and banning alcohol advertisements.
- Increasing support for people with alcohol problems by improving accessibility, reducing waiting times, and enhancing links with mental health services.
- Restricting the availability of alcohol by limiting purchasing opportunities by time and location.
- Providing alternatives to alcohol-related activities, such as non-alcohol related socialising activities, particularly for young people, making more zero/low alcohol alternatives available, and addressing a culture that glamourises alcohol.
- Introducing more enforcement-related activities such as improving how police respond to alcohol-related incidents and introducing tighter regulations for licences to sell alcohol.

Some participants argued decisions over drinking behaviour were in the hands of individual drinkers, such that the Welsh Government and its partners should not intervene.

Conclusions

There are several important conclusions to draw from this final assessment of the impact of MPA on the general population of drinkers in Wales.

First, four years post-implementation, MPA appears to have had little impact on the drinking patterns of the people participating in this study. Changes in the frequency and quantity of alcohol consumption were reported by only a small minority of people.

Second, while many people were aware of MPA, there were others who were not. Furthermore, among those who were aware of MPA, most had only a vague understanding of the policy.

Third, some people (typically those living close to the border or travelling regularly to England) reported circumventing the legislation by purchasing alcohol in England at cheaper prices.

Fourth, the widely anticipated negative consequences of MPA were not commonly reported among the drinkers in this study. However, that is not to say they were entirely absent. The shift from cider to spirits and the use of illegal drugs as a cheaper alternative to alcohol among a small number of drinkers are examples.

Tentative recommendations

The results of this study have shown MPA is an effective mechanism for removing very cheap alcohol products. Strong white cider has increased significantly in price following the introduction of MPA and is now largely absent from shop shelves. However, the broader impacts of MPA are mixed, and

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certain populations appear to be more vulnerable to its negative effects than others.

Based on our evaluation, we recommend the Welsh Government lays regulations to continue the MPA legislation. To maximise the effectiveness of MPA and minimise unintended negative consequences, we further recommend the Welsh Government implements a series of complementary actions. Each recommendation is outlined below, along with a brief rationale:

Lack of awareness and understanding

While many participants were aware of MPA a sizeable minority were not. Furthermore, most of those who were aware had only a vague understanding of the policy, which could undermine its effectiveness.

Recommendation

Implement more extensive and targeted awareness campaigns to educate the public about MPA, its rationale, and its implementation.

Perceived unfairness and impact on vulnerable groups

Some drinkers viewed MPA as unfairly impacting those with alcohol problems and lower-income households.

Recommendation

Implement measures to mitigate the perceived unfairness, such as providing greater clarity about MPA being a whole population measure that targets

hazardous and harmful drinkers in general.

Cross-border shopping and impact on the Welsh economy

Some drinkers, particularly those living close to the border and those travelling regularly to England, reported purchasing alcohol in England to avoid the higher prices in Wales due to MPA, potentially impacting the Welsh economy and undermining the policy's effectiveness.

Recommendation

Assess and monitor the extent and impact of cross-border shopping across Wales and explore strategies to address cross-border shopping, such as coordinating with English authorities or implementing measures to encourage local purchasing.

Substitution effects and unintended consequences

A small number of drinkers reported substituting alcohol with illegal drugs, which could lead to unintended negative health and social consequences.

Recommendation

Monitor and address potential substitution effects through targeted research, interventions, education, and support services.

Lack of evidence on long-term effectiveness

Many drinkers were unsure about MPA's effectiveness due to a lack of clear evidence, particularly in the long term.

Recommendation

Continue long-term monitoring and evaluation of MPA's impact on alcohol consumption and related harms in Wales (e.g., hospital admissions, alcohol-related deaths, alcohol sales), but also synthesise findings from other countries with similar pricing policies (e.g., Scotland and Ireland), and routinely and more widely publicise the findings.

Need for complementary measures

Drinkers suggested introducing various complementary measures to enhance the effectiveness of MPA, such as launching alcohol harm awareness campaigns, improving access to support services, reducing waiting times for residential detoxification, limiting opportunities to buy alcohol, and tightening regulations for licences to sell alcohol.

Recommendation

Within the powers devolved to the Welsh Government, implement a comprehensive approach that combines MPA with other evidence-based interventions and policies to address alcohol-related harm more holistically.

Pricing adjustments

There were mixed views on whether the minimum unit price should be maintained, decreased, or increased to achieve the desired impact.

Recommendation

Regularly review and adjust the minimum unit price based on ongoing monitoring and evaluation, taking into account factors such as inflation, cost-of-living changes, and policy effectiveness.

Footnotes

(<https://www.gov.walesnull>)[¹ (<https://www.gov.wales#1>)] MPA is not a tax, which means that Welsh Government does not generate income as a result of its implementation.

Contact details

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Views expressed in this report are those of the researchers and not necessarily those of the Welsh Government.

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