



Llywodraeth Cymru
Welsh Government

RESEARCH, DOCUMENT

Review of the introduction of minimum pricing for alcohol in Wales: summary

The evaluation aimed to assess the contribution (if any) that the introduction of minimum pricing for alcohol (MPA) in Wales has made to any alcohol related behavioural, consumption, and retail outcomes.

First published: 15 January 2024

Last updated: 15 January 2024

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Research aims and methodology

This report provides an overall evaluation of the introduction of a minimum price for alcohol (MPA) by the Welsh Government. It covers the period up until June 2024.

The evaluation has utilised a Contribution Analysis approach to its methodology. The overall aim is to assess the contribution (if any) that the introduction of MPA in Wales has made to any (measurable and observable) alcohol related behavioural, consumption, and retail outcomes.

In doing so this report has brought together a range of secondary and primary data material. This includes the final reports from the other Welsh MPA evaluations, some additional primary interview data, other Welsh data sets, reflections on the implementation of pricing policies in other jurisdictions, and key messages from the research literature.

To maintain a manageable volume of material and enhance readability, this report does not repeat the detail of previous events and evaluations that is available elsewhere. Instead, it signposts to these existing evidence trails, summarising the position in 2024 and what might be said about the effect of MPA and next steps, as well as providing recommendations for the Welsh Government in deciding whether to renew the policy or not.

It should be noted that as an overall synthesis report it collates messages across the whole population, and as such explores considerations for the general population and moderate, hazardous, harmful, treatment seeking and dependent drinkers.

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Background and context

Minimum pricing for alcohol has become an increasingly established policy response across the globe. It sits within a diversity of policy frameworks that seek to regulate a legal market and address the known harms caused by excessive alcohol use. Managing alcohol affordability is considered to be one of the key effective elements of a successful alcohol policy. The Welsh Government MPA legislation focuses on such issues of affordability.

The background for the Welsh Government's introduction of an MPA policy has been set out in detail in a number of previous reports. The introduction of the policy in Wales was subject to three stages of consultation in 2014, 2015, and 2018.

The Public Health (Minimum Price for Alcohol) (Wales) Bill was passed through the (then) National Assembly for Wales in June 2018 and received Royal Assent, becoming an Act, on 9 August 2018. It set a minimum price for alcohol based on a unit of alcohol costing 50p (i.e., 50ppu). The legislation took effect on 2 March 2020.

In setting a price of 50ppu, the Welsh Government explicitly set out its policy to 'target alcohol consumption among hazardous and harmful drinkers, with the aim of delivering greater health benefits to those most at risk, while taking account of impacts on moderate drinkers and interference in the market' (<https://www.gov.walesnull>)^{footnote 1} (<https://www.gov.wales#1>)¹. In deciding on the 50ppu level, the Welsh Government were also mindful of the long running arguments and concluding considerations of the Scottish Government's legal battle to establish the legitimacy of its (50ppu) MUP policy.

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Main findings and messages

MPA implementation in Wales can be described as smooth and effective. By which we would suggest the policy took effect (noticeable price change on certain products) and was followed by high degrees of compliance.

The policy can be seen to have clear observable impacts. Notably these are: (i) the removal of certain very cheap products (notably large volumes of cheap ciders and lagers); (ii) a clear compliance with alcohol being sold by retailers within Wales at or above the minimum price; (iii) observable differences between English and Welsh retail behaviour; (iv) some adaptive change by producers and retailers in the nature of offers and products made available within Wales; and (v) some switching in purchasing (and assumed consumption) from cheap strong ciders and lagers to other beers, wine and spirits.

There is some indicative evidence that overall, Welsh consumption [using purchasing as a proxy] was reduced post MPA. Most Welsh drinkers appeared to not be adversely affected by MPA at the 50ppu level. Consequently, there was limited evidence of significant changes in purchasing and consumption behaviour for the majority of the population.

It appears there was more impact on those drinking at levels consistent with dependency or seeking treatment. Rather, there is evidence to indicate that for those drinkers on low incomes, especially those drinking at higher volumes, MPA had a negative impact of increasing financial strain, such that the maintenance of affordability was usually achieved through the extension of existing coping mechanisms, typical of which would be going without food or paying other bills.

It is important to note that MPA specifically targets the affordability of alcohol, rather than encompassing all aspects of alcohol policy or addressing all alcohol-related harm considerations. The affordability of any product disproportionately

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affects those with the lowest incomes and MPA is no different. This should not be a reason to reject the value of MPA to overall alcohol policy interventions. After all, no one would recommend cheap unhealthy foods as the solution to those experiencing food poverty.

The period of the evaluation has not seen any of the initially perceived fears of adverse harm materialise in any significant manner. This is true of the expressed fear of drinkers 'switching' to illegal drug use. Whilst there was reporting of some other drug use, crime, and other extended negative consequences, these were for the minority of mostly dependent drinkers rather than all and were often compounded by other health and social related experiences.

Statistics for key alcohol harm measures, notably those of alcohol related deaths and hospital admissions have [yet] to show any decline in recent trends of increasing numbers of harms. The evidence points towards acute pressures on health and social related harms, often connected with the increase in living costs and impacts of austerity on service provision.

There is an increasing amount of literature that refers to the 'messiness' of policy-based evaluations, and this includes minimum pricing for alcohol. The period of implementation of MPA, and the subsequent evaluation has seen factors that have contributed to this messiness, including austerity, changes in excise duty, cost of living crisis, COVID-19, cross border shopping opportunities, industry actors, inflation, and the limits of devolution (e.g., on alcohol marketing and licensing).

Alcohol consumption and its related harms remain a significant part of the Welsh economic, health, and social landscape. There is early indicative evidence that MPA in Wales can contribute to reducing these harms.

The wider modelling, academic literature, and evaluations in other jurisdictions point towards governments needing to have regard to the price (affordability) of alcohol as one of the key mechanisms for successful alcohol policy

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implementation. Such effective alcohol policies are often referred to as ‘best buys’ or ‘sweet spots’. MPA remains one of the World Health Organization’s ‘best buys’ (<https://www.gov.walesnull>)^{[footnote 2} (<https://www.gov.wales#2>)] for effective alcohol policy leading to harm reductions.

The Welsh evaluation suite has been a relatively modest one. This has felt appropriate in the context of: (i) Wales following Scotland and being able to compare with their more comprehensive evaluation; (ii) the size of the evaluation resources available to the Welsh Government; and (iii) the broader international academic literature already indicating the value of pricing as an integral element of effective overall alcohol policy approaches.

The earlier, more extensive Scottish evaluation of MPA at the same 50ppu unit was broadly positive and led to the Scottish Government adopting the policy beyond its sunset clause and a revised minimum price of 65ppu.

Next steps and recommendations

Despite a small number of important reservations, the overall evaluation points towards a positive account of the MPA as a policy measure and more specifically the Welsh implementation. This in turn suggests it is an important tool, among others, in alcohol policy development.

The obvious step would be to follow the Scottish lead and renew the legislation, and thus retain the policy option. Electing not to renew the MPA legislation and letting the ‘sunset clause’ take effect has certain implications. The most obvious of these is that Wales will see the return of the availability of cheaper alcohol products and the associated increase in harms.

The Welsh Government could also consider, especially in light of the Wales Act (one of the original drivers to enact the legislation in 2018)

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(<https://www.gov.walesnull>)^[footnote 3 (<https://www.gov.wales#3>)], that if the current MPA legislation lapses it might not necessarily be available as a policy measure to the Welsh Government in the future (without the permissive support of the UK Government).

Questions remain about the diminished impact over time of the original (and still current) 50ppu price. The Welsh Government should decide what an appropriate price is going forward. The decision to raise the minimum price is also a political one, and not without its communication and implementation considerations in the current economic context.

The report concludes with the following recommendations for Welsh Government

- The Welsh Government should renew rather than lose the option of MPA as an alcohol policy measure in Wales.
- The Welsh Government should actively consider a review of the current 50ppu price level.
- A price increase to at least 65ppu is required to maintain the current policy value and any of the positive impacts observed so far.
- The Welsh Government should give regard to how any continued use of the legislation and any potential price increase will be supported by active well-crafted communication.
- The Welsh Government should take note of the adverse effect of the policy on certain populations of low income and heavy drinkers and should in turn ensure that its alcohol treatment, policy, and provision readily meet the needs of this group.
- Any continuation of the policy should be accompanied by ongoing and further evaluation. This should include regard for the impact of MPA on children, young people, and families.
- The Welsh Government should take active regard that inequality and subsequent deprivation is such a critical factor in health outcomes. It should, where possible, continue to mitigate poverty and social injustice as it is

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increasingly clear that alcohol harms most heavily fall on those with multiple acute adverse experiences, lower levels of income, and who are experiencing poverty.

The report also included the following recommendations for service/treatment providers (if the policy remains and/or the minimum price changes)

- They should better communicate more clearly with staff and those using their services about the policy of MPA.
- They should actively engage with the experiences of individuals and support services for financial support, housing, relationship advice, counselling, and referral into detox.
- They should be clear in offering explicit harm reduction advice regarding the potential harms of switching from one alcohol product to another and/or to other substances.

Footnotes

(<https://www.gov.walesnull>)[**1** (<https://www.gov.wales#footnote-1>)] **Written Statement - Public Health (Minimum Price for Alcohol) (Wales) Bill** (<https://www.gov.wales/written-statement-public-health-minimum-price-alcohol-wales-bill>)

(<https://www.gov.walesnull>)[**2** (<https://www.gov.wales#footnote-2>)] **Tackling NCDs: Best Buys, 2017 (World Health Organization)** (<https://www.who.int/publications/item/WHO-NMH-NVI-17.9>)

(<https://www.gov.walesnull>)[**3** (<https://footnote-3>)] **The case of alcohol pricing in Wales, Lesch and McCambridge, 2023 (Taylor & Francis Online)** (<https://www.tandfonline.com/doi/full/10.1080/13597566.2021.1934454>)

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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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Social research number: 80/2024

Digital ISBN 978-1-83625-873-5



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