



# Research into the potential for substance switching following the introduction of minimum pricing for alcohol in Wales: Executive summary

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## 1. Research aims and methodology

- 1.1 This report presents the results of a study investigating the potential consequences of introducing a minimum price for alcohol in Wales with a focus on the possibility of 'substance switching'. The study was conducted by a consortium of researchers from Figure 8 Consultancy, the University of South Wales and Glyndŵr University.
- 1.2 The main aim of the study was to explore the extent to which switching between substances may be a consequence of the introduction of a minimum price for alcohol. More specifically, the study had eleven objectives, four focusing on individuals working as providers of services to people with alcohol problems (i.e. service providers) and seven focusing on people receiving support from those services (i.e. service users).

### Service providers

- To explore service providers' awareness of the Public Health (Minimum Price for Alcohol) (Wales) Act 2018 legislation (from now on referred to as MPA legislation), and what it means.
- To explore with service providers the approaches they will use to help people prepare for the change in the legislation and the introduction of a minimum price for alcohol.
- To explore service providers' perceptions of the likelihood of people switching.
- To explore with service providers possible additional support materials or guidance that may be required.

### Service users

- To explore service users' awareness of the MPA legislation and what it means.
- To explore with service users how they will prepare for the change in the legislation
- To explore with service users their existing use of alternative substances.
- To explore with service users their perceptions of the incoming legislation.
- To explore with service users whether they would be likely to switch to another substance and if so, to what and if not why.
- To explore with service users any coping mechanisms that might be adopted when prices rise.
- To explore with service users the support they may require to prepare for the change.

- 1.3 In short, the project aimed to investigate the perception of possible consequences of introducing a minimum price for alcohol in Wales including the potential for substance switching and other unintended consequences, and to explore ways of preventing and/or responding to those consequences.
- 1.4 A combination of interviews and online survey questionnaires were used to enable the research objectives to be met.
- 1.5 The research included, to varying degrees, four groups of people:  
Primary focus
  - Service providers (i.e. people involved in the delivery of alcohol support services).
  - Service users (i.e. harmful or hazardous drinkers engaged with services).Additional perspectives
  - Harmful drinkers not engaged with services.
  - Other drinkers not engaged with services.
- 1.6 The research focused on adults aged 18 and over who were either resident in Wales or involved in the delivery of alcohol services within Wales.
- 1.7 Interviews were conducted with 49 service users and 38 service providers (including operational management and frontline staff). Three interviews with service users were done in groups.
- 1.8 Surveys were completed by 100 service providers and 93 drinkers.

## **2. Background and context**

- 2.1 Levels of alcohol-related harm and hazardous and harmful drinking remain an issue in Wales despite Welsh Government implementing a range of activities that are consistent with its current substance misuse strategy (Livingston et al, 2018). There is strong international academic evidence that increasing the price of alcohol is one of the most effective ways of controlling levels of alcohol consumption and reducing alcohol-related harm (Nelson et al, 2013b; Wagenaar, 2009). However, up until recently, pricing as a key element has been missing from the Welsh Government's approach to reducing alcohol-related harm.
- 2.2 In introducing the Public Health (Minimum Price for Alcohol) (Wales) Bill, the Welsh Government were clear in signalling the overall intent of the bill as a whole population measure rather than one targeting any specific sub-group (e.g. dependent drinkers). The Public Health (Minimum Price for Alcohol) (Wales) Act 2018 sets out a formula for calculating the applicable minimum price for alcohol – based on the minimum unit price (the MUP), the percentage strength of the alcohol, and its volume. Importantly, the subsequent revenue goes to the drink's producers and retailers, not the Government.
- 2.3 During the scrutiny stages of the Bill, concerns were raised by Assembly Members and other stakeholders, about possible unintended consequences arising from the legislation, including the possibility of hazardous and harmful drinkers switching to other substances. However, evidence of the extent of such behaviour is scarce as there is little, and contradictory, published research available on this matter (Falkner et al, 2015; Keatley et al, 2016; Stockwell, 2017).
- 2.4 In March 2018, the Health Social Care and Sport Committee published their stage 1 report on the Public Health (Minimum Price for Alcohol) (Wales) Bill and included a recommendation to undertake research into this issue. In response, Welsh Government accepted this recommendation and issued an Invitation to Tender for research into users switching substances (C086/2018/2019) and the contract was awarded to a consortium of researchers from Figure 8 Consultancy, the University of South Wales and Glyndwr University.

- 2.5 While the new legislation is based on a whole population approach to tackling alcohol-related harm, the research was commissioned to focus on the attitudes and perceptions of those either receiving or delivering support for alcohol-related problems. The findings presented in this report must therefore be considered in this context.

### **3. Key findings**

#### **Potential for switching substances**

- 3.1 In terms of the main aim of the study, the perception of the likelihood of minimum pricing for alcohol leading to switching in substance use behaviour, there were several key messages. The first of these is that for the majority of drinkers, the only switching or change in use is likely to be alcohol related and largely an adaptation of existing behaviour within the new pricing framework (e.g. a switch in type of alcohol or a change in purchasing behaviour). This was suggested because it was felt that for many drinkers, alcohol is a clear drug of choice and crossing over to drugs, and especially towards the margins of legal/illegal activity, was just not an option. There was a suggestion that switching between substances would be more likely to occur amongst certain groups, notably street drinkers and those with prior experience of drug use.
- 3.2 If switching away from alcohol was to occur, it was predicted that this would most likely be to prescription medications such as benzodiazepines that mimic the effects of alcohol, followed by cannabis and spice, with only a few suggesting a switch to cocaine or opiate use.

#### **Awareness and understanding of MPA**

- 3.3 It was clear among both drinkers and providers that the norm was of very little or no awareness, and what awareness there was had either been triggered by the research process or through news or community discussion.
- 3.4 Few respondents in our study had a detailed, concrete and accurate understanding of minimum pricing. Associated with this were three overt attitudes:
- that the principle of doing something about the availability and harm of alcohol was ‘a good thing’ and was indicative of the beginning of a ‘cultural shift’ in thinking about alcohol;
  - that the introduction of a Minimum Unit Price of 50p (the Welsh Government’s preferred level) would make very little overall difference to most people’s drinking.
  - that the group of individuals it would affect the most are potentially the most vulnerable, i.e. strong cider drinkers, often homeless and with minimum resources to develop alternative, less harmful and sustainable coping strategies.
- 3.5 Typically, within these conversations was a belief that the price change was a tax and questions about where the new revenue would go and whether it would or could be spent on increased treatment provision.

#### **Coping with the implementation of minimum pricing**

- 3.6 For low-medium risk drinkers, the general feeling was that any increase in expenditure would be absorbed into existing budgets and that no significant adaptation or change in behaviour would be warranted.
- 3.7 However, a different scenario was anticipated for ‘high risk/addiction likely’ drinkers, and a range of potential coping mechanisms were predicted. There was some concern that many of these strategies could result in negative consequences not only for drinkers but also for their families, friends and the communities in which they live.

- 3.8 A wide range of coping strategies were anticipated by study respondents, including:
- The possibility of dependent drinkers switching to stronger forms of alcohol.
  - The potential for an increase in home brewing (including the notoriously complicated production of spirits) and the use of counterfeit alcohol similar to, or using the same channels as, the ones for counterfeit cigarettes (from a black market anticipated to thrive following the introduction of minimum pricing).
  - The potential for drinkers to resort to acquisitive crime to fund their continued use of alcohol was frequently suggested by providers. The drinkers we asked were less likely to predict an increase in their own offending behaviour but anticipated that crime was likely to increase among other drinkers, particularly dependent ones.
  - The possibility that drinkers might re-budget their existing resources to free up money to spend on alcohol was another method of coping reported by providers and drinkers. Most commonly it was predicted that drinkers would forego essentials such as food and household bills to fund their continued use of alcohol.
  - The potential consequences of re-budgeting as a coping strategy, particularly for family members, were a source of concern. The main problem anticipated is that children will end up going without food and clothing and that housing arrangements will become unstable in the wake of unpaid rent or mortgage repayments.
  - The potential for drinkers to borrow money to fund their continued use of alcohol was also reported. One of the main concerns here was that increasing demands for money would put a strain on relationships and in the worst-case scenario result in family breakdown.
  - There was also concern that borrowing more formally by way of 'tabs' from pubs and shops would result in an increase in debt and financial pressure, which too could impact negatively on relationships with family members who may be asked to pay off the debt. The impact that minimum pricing would have on drinkers in receipt of Universal Credit, which is often issued in one lump-sum, was a specific worry.
  - The possibility that drinkers might obtain supplies of alcohol from countries not currently implementing minimum pricing policies was another strategy mentioned by respondents. The potential for this change in behaviour was thought to be most likely in locations close to the English border. However, it was also anticipated that areas deeper into Wales (e.g. in the Valleys) would also make use of cross-border supplies.
- 3.9 It is important to note, however, that these somewhat negative predictions may well not materialise once the legislation is implemented. Previous research in countries where the price of alcohol was increased (through taxation or minimum pricing) has found that harmful coping strategies such as stealing alcohol, committing income-generating crimes and substituting alcohol for non-alcohol beverages are relatively uncommon.

### **Preparing and planning for the introduction of minimum pricing**

- 3.10 Given the general lack of awareness, it naturally follows that preparation for the impending change by either service providers or drinkers had not really begun to take place. It was in only a small number of areas where efforts to prepare for the change in law had really got underway and in these areas the work had only recently (at the time of the research) begun.
- 3.11 While a few organisations were preparing for the introduction of minimum pricing, many were not, and as such there was agreement among providers and drinkers that more preparatory work was needed. The consensus was that any preparatory work should focus on raising awareness of minimum pricing in simplistic and easily accessible terms and on signposting people to appropriate services. It was also widely agreed that additional resources are needed to ensure easy and quick access to appropriate services.

- 3.12 Unlike the providers who all agreed that work needed to be done by them and their agencies, few drinkers anticipated doing anything to prepare for the introduction of minimum pricing.

## 4. Conclusions/Recommendations

### Conclusions

- 4.1 It is important to note that while the goal of MPA may be to reduce alcohol-related harm among the population as a whole, the purpose of this study was to focus largely on the views of drinkers engaged in services (who by their nature have alcohol-related problems) and staff providing support to such people. The findings clearly reflect the context of those asked.
- 4.2 It should also be highlighted that much of the data collected are perceptions about, and predictions of, what might happen once the minimum price for alcohol is introduced in Wales. As such, the report suggests possible rather than actual future scenarios after the minimum price implementation.

### Recommendations

- 4.3 Considering these findings, a series of recommendations are proposed that will help guide the implementation of minimum pricing for alcohol in Wales:
- There is a pressing need to increase pre-implementation awareness among drinkers and services. It is important that people know that minimum pricing is imminent so that they can begin to prepare for its introduction. Increasing knowledge will also help dispel myths that minimum pricing for alcohol is a tax that will generate funds for Welsh Government.
  - It is recommended that the publicity material be developed in different formats (both visual and audio) and distributed on different platforms (social media, radio, posters, billboards, in-person) given the diversity of the audience who may be affected by any changes.
  - Minimum pricing should be an active part of all the existing closer working and communication agendas for an array of agencies (including health, police, probation, housing/homelessness and domestic violence services).
  - Service providers should develop tools that will educate staff and service users about the potential consequences of minimum pricing and ways of reducing potential harms.
  - Welsh Government should consider holding several provider events, in the run up to implementation. Given the key role of caseworkers working with specific drinkers such events should be targeted at those working directly with the drinkers most likely to be affected. However, it is important that these events also consider ways of helping hazardous and harmful drinkers who are not currently in touch with services.
  - Welsh Government should consider the implementation of various preventative measures to limit any harmful consequences of the legislation among the most harmful drinkers. Particular attention should be given to the most marginalised groups such as homeless street drinkers. These measures include:
    - i. Increasing timely access to alcohol detoxification and treatment services.
    - ii. Ensuring that the Welsh Ambulance Service as well as A&E services are aware and prepared for a possible increase in patients requiring treatment for alcohol withdrawal symptoms.
    - iii. Ensuring that GPs and healthcare professionals are prepared for a possible increase in patients seeking prescription medication such as benzodiazepines.
    - iv. Educating drinkers on the dangers of switching substances and using counterfeit (both bootleg and homebrew) alcohol.

- v. Work with Trading Standards to provide guidance to agencies on the availability and nature of counterfeit alcohol.
- Consultation with retailers and the alcohol producing industry should be undertaken to understand how they propose to respond to the change in legislation (e.g. to monitor media coverage and to examine if they will uphold the spirit of the law or navigate their way around it).
- During the course of the study, comments were often made about the potential consequences of minimum pricing on young people under the age of 18. We therefore recommend that the impact of minimum pricing on young drinkers including children be investigated as part of the broader evaluation programme.

Full Research Report: Katy Holloway, Tom May, Marian Buhociu, Wulf Livingston, Andy Perkins and Iolo Madoc-Jones (2019). *Research into the potential for substance switching following the introduction of minimum pricing for alcohol in Wales*. Cardiff: Welsh Government, GSR report number 48/2019.

Available at: <https://gov.wales/minimum-pricing-alcohol-research-potential-consequences>

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

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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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