Public Document Pack

ABERDEEN
CITY COUNCIL

To: George Wyatt, Convener; Craig Adams, Vice Convener; Gerard Rattray (Representative of Holders of Premises Licences/Personal Licences); Inspector John Soutar (Grampian Police); Sandy Kelman (Alcohol and Drugs Partnership); David Wright, (Education); Mairi MacLeod (Children's Services); Linda Smith (Health); Heather Manning (Samaritans); Garry Burnett, Michelle Wall, and Mike Saint (Community Safety); Mary Crawford, Allan McIntosh, Ken Eddie, Councillor Martin Greig (Representatives of Residents within the Forum's Area); Barry Black and Callum Martin (Representative of Youth) and Diane Sande (Licensing Standards Officer).

Town House,
ABERDEEN 30 August 2012

LOCAL LICENSING FORUM

The Members of the **LOCAL LICENSING FORUM** are requested to meet in Committee Room 5 - Town House on **THURSDAY, 6 SEPTEMBER 2012 at 2.00 pm**.

JANE MACEACHRAN
HEAD OF LEGAL AND DEMOCRATIC SERVICES

B U S I N E S S

GENERAL

1.1 Minute of the Previous Meeting of 21 June 2012 (Pages 1 - 6)

1.2 Minute of Joint Meeting with the Licensing Board of 16 August 2012 (Pages 7 - 12)

1.3 Agenda and Minute of Licensing Board Meeting of 26 June 2012

The agenda for this meeting can be found at:

http://committees.aberdeencity.gov.uk/ieListDocuments.aspx?CId=151&MId=2461&Ver=4

1.4 Workplan/Decision Sheet (Pages 13 - 18)

1.5 Doors Supervisor Working Group - additional member

At the first meeting of the Licensing Board, it appointed one additional member to the Working Group. As a result, the Board has asked if the Forum would also like an additional member on the group.

1.6 Joint Aims and Objectives

At the joint meeting with the Licensing Board, it was agreed that the Forum would decide on a membership for a small working group, to look at joint aims and objectives for Forum and Board.

1.7 Aberdeen City Alcohol & Drugs Partnership ADP Strategy 2009-2019 - for discussion

A safer, healthier & more responsible attitude to alcohol in Aberdeen.

1.8 City Voice Questionnaire Results (Pages 19 - 62)

Please note that the results contained in this survey cannot be shared until after 6 September.

INTELLIGENCE (TO INFORM THE WORKING GROUP OF THE LICENSING FORUM)

LICENSING OBJECTIVE 1: PREVENTING CRIME AND DISORDER

2.1 Update from Inspector John Soutar, Grampian Police

LICENSING OBJECTIVE 2: SECURING PUBLIC SAFETY

2.2 Update from Licensing Standards Officer

LICENSING OBJECTIVE 3: PREVENTING PUBLIC NUISANCE

2.3 Update from Unight Representative

LICENSING OBJECTIVE 4: PROTECTING AND IMPROVING PUBLIC HEALTH

2.4 Update from Linda Smith, Public Health NHS Grampian, and Sandy Kelman (Alcohol and Drug Partnership)

LICENSING OBJECTIVE 5: PROTECTING CHILDREN FROM HARM

2.5 Update from Mairi MacLeod, Children's Services Representative

MATTERS ARISING

3.1 Any Other Competent Business

3.2 Date of Next Meeting - 15 November 2012

Website Address: www.aberdeencity.gov.uk

Should you require any further information about this agenda, please contact Lynsey McBain on 01224 522123 or email lymcbain@aberdeencity.gov.uk

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LOCAL LICENSING FORUM

Thursday, 21 June 2012

Present:	George Wyatt, Craig Adams, Gerard Rattray, Sergeant Robert McRobb (as substitute for Inspector John Soutar), Sandy Kelman, Ken Eddie, Mary Crawford, Mike Saint, Linda Smith, and Diane Sande.
Also Present:	Martin Allan and Lynsey McBain, Clerk to the Local Licensing Forum.
Apologies:	David Wright, Bob Westland, Garry Burnett, Heather Manning, Inspector John Soutar, Callum Martin and Barry Black.

ELECTION OF FORUM CONVENER AND VICE CONVENER

1. With reference to article 1 of the minute of the previous meeting, the Forum agreed that George Wyatt would become the new Convener and Craig Adams would be the new Vice Convener.

The Forum resolved:-
to agree that George Wyatt would become the new Convener of the Forum, with Craig Adams as the Vice Convener.

MINUTE OF THE PREVIOUS MEETING

2. The Forum had before them, the minute of the previous meeting of 12 April 2012.

The Forum resolved:-
to agree the minute as a correct record.

AGENDA AND MINUTE OF THE LICENSING BOARD

3. With reference to article 4 of the minute of the previous meeting, the Forum had before them, the minute of the Licensing Board of 3 April, 2012, for information.

The Forum asked who the new members of the Licensing Board members were. The clerk agreed to send a list of the new Board members out to the Forum, after the first meeting of the Licensing Board is held on 26 June.

The Forum resolved:-
(i) to note that a list with the names of the new Board members would be circulated to Forum members in due course and;
(ii) to otherwise note the minute.

WORKPLAN AND DECISION SHEET

4. With reference to article 5 of the minute of the previous meeting, the Forum had before them an updated workplan.

Sandy Kelman advised that an update could be added in relation to the city voice.

The Forum resolved:-
(i) to note that Sandy Kelman would send an update on the current status of the city voice item, to the clerk; and
(ii) to otherwise note the workplan.

DOOR SUPERVISOR WORKING GROUP

5. With reference to article 6 of the minute of the previous meeting, the Forum had before them, a note from the clerk of the Working Group which provided an update on the current situation on the Working Group.

It was noted that the last meeting was held on 10 April 2012 and it had not met since the local government elections. The Licensing Board were due to refresh the membership of the group at the first meeting of the Licensing Board on 26 June 2012.

Mike Saint queried what the remit of the group was and asked that some information be provided, as he was new to the Forum.

The Forum resolved:-
(i) to request that the clerk gather some information on the remit of the Working Group, and email it on the members of the Forum; and
(ii) to otherwise note the information provided.

JOINT MEETING WITH LICENSING BOARD 16 AUGUST 2012

6. With reference to article 11 of the minute of the previous meeting, the Forum discussed the possible topics for discussion at the joint meeting with the Licensing Board.

The Forum touched on various aspects that they would like to discuss with the Board and agreed that members of the Forum would meet informally to decide on the topics for the agenda.

The Forum resolved:-
to agree that the Convener meet with representatives from Health, Police, Alcohol & Drug Partnership and Licensing Standards on an informal basis to agree on the topics to be covered at the joint meeting with the Licensing Board, and to advise the clerk to the Forum in due course of the agenda items.

LICENSING OBJECTIVE 1: PREVENTING CRIME AND DISORDER

7. The Forum heard from Sergeant Robert McRobb, Grampian Police in relation to Licensing Objective 1, Preventing Crime and Disorder.

Sergeant McRobb advised that no serious assaults had been recorded during April and May 2012 in City Centre licensed premises and there had been less common assaults within licensed premises aswell.

Craig Adams queried about the statistics for assaults within the city centre streets. Sergeant McRobb explained that he did not have the statistics with him but could provide these at a later date.

With reference to article 12 of the minute of the previous meeting, Sergeant McRobb explained that on 31 May, the “Is It Worth it Campaign” was launched and was very well received, with around 80 people attending the launch event. The campaign had been funded by the Alcohol and Drug Partnership and the DVD was being used by secondary schools and local universities.

The Forum resolved:-
(i) to request that the police provide statistics on the amount of assaults recorded within city centre streets, to a future meeting; and
(ii) to otherwise note the information provided.

LICENSING OBJECTIVE 2: SECURING PUBLIC SAFETY

8. The Forum heard from Diane Sande, Licensing Standards Officer in relation to Licensing Objective 2, Securing Public Safety.

Diane advised that over the last three weeks, the Licensing team had been concentrating on the forthcoming Licensing Board meeting and the applications, and noted that since April, four compliance notices had been issued.

Diane further explained that 50 visits to off sale premises had taken place since the last meeting, and that the team continued to liaise with the police and also the noise pollution team.

Diane concluded that a Licensing Conference had been held on 18 May 2012, and advised that should anyone require a copy of the notes to contact her directly.

George Wyatt highlighted that a lot of premises were using Facebook to advertise drink promotions, and then running out of the drink on offer within a short period of time.

The Forum resolved:-
(i) to request that any evidence on false advertising be reported to Diane Sande directly; and
(ii) to otherwise note the information provided.

LICENSING OBJECTIVE 3: PREVENTING PUBLIC NUISANCE

9. The Forum noted that no member was present from UNIGHT and therefore no update was available.

The Forum resolved:-
to request that the clerk contact UNIGHT and highlight the importance of attending the Forum meetings.

LICENSING OBJECTIVE 4: PROTECTING AND IMPROVING PUBLIC HEALTH

10. The Forum heard from Linda Smith, NHS Grampian in relation to Licensing Objective 4, Protecting and Improving Public Health.

Linda explained that NHS Grampian had been a statutory consultee since October 2011 in relation to new applications for Licenses. Linda advised that it was difficult for them to pass comment on applications as it is difficult to determine the influence of a single premise on public health.
In relation to the premises who continue to serve people under the influence, Mike Saint suggested that information be sought from the street pastors to establish which premises drunk people were coming from and if there were repeat offenders.

Sandy Kelman also provided an update and explained that the Alcohol and Drug Partnership had their strategy published in 2009 and were looking to refresh it. He advised that it was nearly complete, with a few things to be finalised. Sandy highlighted that he hoped to hold a launch event for the strategy and was keen to get the Convener of the Licensing Board to assist.

Sandy further explained that the City Voice questionnaire went out on 20 June and the results would come to a future meeting of the Forum. He also advised that with regards to people getting treatment in the city, the ADP had been meeting their current target for getting people the required treatment.

Finally, Sandy highlighted that the Best Bar None scheme was an ongoing scheme and one that needed to be promoted.

The Forum resolved:-
to note the information provided.

LICENSING OBJECTIVE 5: PROTECTING CHILDREN FROM HARM

11. The Forum noted that no representative was present from Children's Services at Aberdeen City Council. The Forum noted that it was very important that a representative attend future meetings.

The clerk explained that she had contacted the service to establish who the representative would be, but had heard noting back to date.

The Forum resolved:-

to request that the clerk contact the Head of Children's Services again to determine who the representative would be on the Forum.

ANY OTHER COMPETENT BUSINESS

12. The Convener declared the meeting open for any other competent business, whereby he explained that with an Occasional Alcohol License, the person serving the alcohol does not need to be trained to serve alcohol, however as this was a legislative issue it would be difficult to make any immediate changes however it was agreed that this possibly could be addressed by asking that the License holder trains any staff involved as there was evidence that these types of License were being abused.

DATE OF NEXT MEETING

13. The Forum noted that the date of the next meeting was Thursday 6 September at 2pm, and the Joint Meeting with the Licensing Board was due to be held on Thursday 16 August at 1pm.
- George Wyatt, Convener

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ABERDEEN CITY COUNCIL
JOINT MEETING OF ABERDEEN CITY LICENSING BOARD AND ABERDEEN LOCAL LICENSING FORUM

Thursday, 16 August, 2012

Present: Councillors Boulton, Cameron, Carle, Dickson, Forsyth, Jaffrey and Lawrence (Licensing Board);
George Wyatt, Craig Adams, Gerard Rattray, Ken Eddie, Sandy Kelman, Diane Sande, Raymond Morrison, David Wright, Bob Westland, Linda Smith, Mike Saint, Barry Black, Callum Martin, Garry Burnett and Mairi MacLeod (Local Licensing Forum).

In attendance: Eric Anderson, Depute Clerk to the Licensing Board, Vikki Cuthbert, Democratic Services and Lynsey McBain, Clerk to the Local Licensing Forum.

Apologies: Councillor Grant, Mary Crawford and Allan McIntosh.

WELCOME AND APPOINTMENT OF CHAIRPERSON

1. George Wyatt, Chairman, welcomed everyone to the Joint Meeting of the Licensing Board and Licensing Forum. Board members and Forum members also introduced themselves.

The Chairman explained that the meeting would be on an informal basis and hoped that the Forum and the Board could work together effectively to achieve their common goals.

UPDATE FROM CLERK TO THE LICENSING BOARD

2. Eric Anderson, Depute Clerk to Aberdeen City Licensing Board addressed the meeting with an update of information since the last joint meeting.

Eric firstly explained that the Government policy was currently in the process of being adjusted and the Board’s statement of Licensing policy also had to be renewed by November 2013, which was reviewed annually. Eric further added that the over provision policy would also need to be updated in due course.

Secondly Eric advised that the Doors Supervisor Working Group was established last year with four Board members and four Forum members. However when the new Board was re-established following the Local Government elections, the Board resolved to have five members. As a result Eric asked if the Forum would also like an additional member.

Finally Eric explained that The Licensing Board were required to provide a number of processes under the Equality Act 2010 which must be in place by April 2013. Certain of these processes were in association with the Licensing Board's Statement of Licensing Policy in relation to liquor licenses. Eric concluded that the Forum would be advised, as appropriate, once the processes were formulated.

LICENSING POLICY

3. The meeting had before them, a report by Alcohol Focus Scotland & Scottish Health Action, which highlighted various alcohol problems.

Sandy Kelman spoke in furtherance of the paper, and explained that the document encapsulated a lot of issues surrounding alcohol. Sandy noted that alcohol impacted on every area of individuals lives and alcohol sales through off-trade such as supermarkets, amounted to 68% of the overall sales.

The paper highlighted various issues, such as trends in alcohol licensing in Scotland since 1962 as well as the availability of alcohol.

Sandy described how educating individuals was one of the keys to improving alcohol consumption and its affects.

The members then discussed the document, whereupon Councillor Boutlon, Convener of the Licensing Board explained that she felt that it was very important that the Board and Forum work together. Members also spoke about the various places that alcohol could be purchased at, and suggested that if it wasn't so readily available then people would think twice about buying it. In British Columbia, Canada, off licences sell alcohol but not in places such as supermarkets.

Questions then focused on the health aspect of alcohol consumption, whereby Councillor Boulton asked if health services had any evidence about alcohol misuse etc. Linda Smith, NHS Grampian advised that the evidence they do have is with individuals' deaths, and that the age range they have most problems with is the 45-64 range. Linda further explained that it would be beneficial if health services were to see any applications for a licence within petrol station premises, for example.

LOCAL LICENSING FORUM
23 June 2011

JOINT AIMS AND OBJECTIVES

4. The Board and Forum members watched the training resource DVD for Local Licensing Forum members. Following this, the meeting heard from Sandy Kelman, who outlined the need for the Board and the Forum to work together on their joint aims and objectives. Sandy also explained that he felt that the Forum needed to identity key partners to work alongside the Board, and hold monthly meetings to discuss the various issues.

In relation to this, Councillor Boulton suggested that four to five members of the Forum form a small working group which could then meet with the Board to discuss the Forum's objectives. George Wyatt suggested that at the next meeting, the Forum would agree on the membership of the small working group as well as the joint objectives, which could then be brought to the Board members.

It was also highlighted that the Forum had invited Board members along to the meetings of the Forum in the past. As a way forward it was suggested that an electronic agenda be sent to the Board members from the Forum, and should they wish, they could attend the Forum meetings as an observer.

DATA SETS AND EVIDENCE

5. The meeting heard from Sandy Kelman who advised that the City Voice had recently undertaken a questionnaire study in relation to alcohol and was awaiting the results, which were due to be published on Thursday 6 September.

The questionnaire asked people about their experience of free home fire safety visits from Grampian Fire and Rescue, as well as individuals Alcohol Purchase and Promotion.

Sandy further explained that the data would be brought to the next meeting of the Forum and discussed, and noted that the Board could use the local data gathered to help with their work.

Sandy highlighted that 1000 people from a wide section of the city had received the questionnaire as they aimed to get responses from a cross section of society.

WHOLE POPULATION APPROACH

6. The meeting discussed various health issues associated with alcohol misuse, whereby Sandy Kelman highlighted that it was everyone's responsibility to look more broadly at the provision of alcohol and not just at the pubs and clubs.

The members discussed how the stereotype of someone with alcohol problems was not always the person who had underlying health issues, but individuals who consume alcohol in their own homes on a nightly basis, and Linda Smith, NHS Grampian reiterated that the NHS was expecting to see the impact over the next decade as a result of alcohol misuse.

ASSESSMENT IMPACT OF POLICY

7. The meeting heard from Sandy Kelman who highlighted that when the new draft policy was finalised, it was vital that it was measurable in order to see how successful they had been in achieving their goals.

BEST PRACTICE

8. The meeting had before them a document from West Dunbartonshire Council, which highlighted their overprovision policy.

Members had this document for information and as a basis for assisting contributing to the statement of Licensing Policy.

AOCB

9. The meeting heard from the chairman, who declared the meeting open for any other competent business, whereby Garry Burnett, Grampian Fire and Rescue circulated the Aberdeen City Alcohol & Drugs Partnership ADP Strategy for 2009-2019.

Garry explained that (1) he was the chair at the Alcohol Task Group and noted that the Task Group would performance measure the strategy and (2) the legislation and licensing section was very important and was a key area with the successful implementation and monitoring of legislation relating to alcohol marketing, sales and consumption.

The Forum agreed to discuss the document at the next meeting of the Forum in greater depth.

The chairman also added that in relation to the refresher training courses for personal licence holders, the Scottish Government were currently introducing changes which might result in problems for those who need to do the refresher training at a certain time.

CLOSING REMARKS

10. The Chairman thanked everyone for their positive inputs and stated that he looked forward to working with the Board members in the future.
- George Wyatt, Chairman

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ABERDEEN LOCAL LICENSING FORUM

WORKPLAN AS AT 6 September , 2012

Remit of Local Licensing Forums as set out in the Licensing (Scotland) Act 2005 – keeping under review the operation of the Act in the Forum's area and in particular the exercise by the Licensing Board of their functions including giving advice and making recommendations to the Board in relation to those matters where the Forum considers it appropriate. The Act does not enable a Forum to review or give advice or make recommendations in relation to the exercise by a Board of their function in relation to a particular case. "Case" is taken to mean an application before a Board and in the interests of natural justice is also taken to mean individual licensed premises. The preferred route for consideration of complaints about the running of licensed premises is to write directly to the Clerk or Depute Clerk to the Licensing Board.

The Licensing (Scotland) Act 2005 requires Licensing Boards in exercising any of their functions to have regard to any advice given or recommendations made to them by a Local Licensing Forum and where the Board decides not to follow the advice or recommendation to give the Forum reasons for that decision, the Board must provide copies of relevant statistical information to the Forum as it may reasonably require for the purposes of its general functions.

Licensing Standards Officers have a general function of providing to interested persons information and guidance concerning the operation of the Act, supervising compliance with the Act and the conditions of their licences by holders of Premises Licences and Occasional Licences and mediate between communities and the trade or between any two parties where there is a need to resolve a local problem and develop a local solution. LSOs do not act as "policemen" with regard to licensing but they will liaise with the police and other relevant officials such as Environmental Health Officers in pursuit of the objectives of the Act.

No	**Licensing Objective**	**Update/Outcome/Response**	**Referrals to Licensing Board or Clerk**	**Recommendation to Statement of Licensing Policy Consultation**
(1)	**Preventing Crime and Disorder** • Door Supervisors Working	The Group met for the first time		

No	Licensing Objective	Update/Outcome/Response	Referrals to Licensing Board or Clerk	Recommendation to Statement of Licensing Policy Consultation
	Group	on 26 January 2012. The Forum will receive regular updates from the representative members. At the Joint Meeting with the Board, Eric Anderson advised that the Board now had 5 members and asked if the Forum would also like to increase its membership to 5.		
(2)	**Securing Public Safety** • Find out from communities what are their areas of concern. • To receive reports from the Licensing Board containing relevant statistical information.	The Community Council Liaison Officer is now included in the distribution list of the Forum so that she can disseminate a request for continued communication to all community councils. The Forum and Board will continue to liaise at joint meetings. An invite to the Depute Clerk of the Board to attend a meeting to discuss incoming legislation was made.		
(3)	**Preventing Public Nuisance** • Improve intelligence in relation to statutory bodies.	The Forum is gaining experience as it considers topics and input from Forum members who are representatives of relevant		

No	Licensing Objective	Update/Outcome/Response	Referrals to Licensing Board or Clerk	Recommendation to Statement of Licensing Policy Consultation
		agencies. The Forum has been represented at conferences and training events and will continue to do so.		
(4)	**Protecting and Improving Public Health**	Sandy Kelman advised that the results of the City Voic questionnaire would be available at the meeting of 6 September.		
(5)	**Protecting Children from Harm**			
(6)	**Any Other Competent Business Raised** • Staffing Levels – the Forum and Sub-Committee noted that Aberdeen is the only city in Scotland to employ only one Licensing Standards Officer. Although information on staffing levels in Scotland may be out-of-date there is no doubt the majority of local authority areas employ more than one Licensing Standards Officer.	The officers concerned have given a commitment to review the position to decide whether or not to prepare a business case to support a request for additional staff resources. Meantime the Forum is asked to note that in addition to the Licensing Standards Officer one other officer has been trained in the Licensing Act duties. Other staff have also received elements of LSO training and this should facilitate a more proactive approach in relation to visiting licensed premises. The LSO's Line Manager will continue to		

No	Licensing Objective	Update/Outcome/Response	Referrals to Licensing Board or Clerk	Recommendation to Statement of Licensing Policy Consultation
	• To request an outline from the Licensing Board on measures it will employ to ensure compliance with the five licensing objectives. This is being addressed as part of the review of the Statement of Licensing Policy.	monitor her workload which is standard Council practice. At the joint meeting with the Board on 23/4/10 it was confirmed that it will continue to monitor statistical trends in relation to crime and if possible health and other indicators in order to evaluate contributions to the achievement of the licensing objectives.		

ACTIONS FOR LICENSING FORUM IN

ALCOHOL STRATEGY 2009 – 2019 AND IN ALCOHOL RELATED DISORDER IN THE CITY CENTRE ACTION PLAN

(1) Reducing Consumption – The Licensing Board will consult widely on specific measures to deliver and enhance their policy including receiving advice from the Licensing Forum.

(2) Prevention (a) – Encouraging developments to increase access to food and non-alcoholic drinks in clubs and the licensed premises at night in liaison with Unight, the Licensing Board and City Centre/Safer Aberdeen Forum.

(3) Prevention (b) – Review to establish how a more preventative approach to over-consumption of alcohol can be devised in partnership between the Licensing Board and the trade.

(4) Prevention (c) – Attract different types of premises to offer family orientated entertainment such as late night coffee shops, cafes, etc. in liaison with the Licensing Board, Unight, Safer Aberdeen Forum and Economic Development staff.

committees/aberdeen local licensing forum/Notes/workplan may 2012

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HEALTHIER

Alcohol Purchase and Promotion

The Aberdeen City Alcohol and Drugs Partnership (ADP) is a multi agency partnership including Aberdeen City Council, NHS Grampian, Grampian Police, Grampian Fire and Rescue Service and the Third Sector. The partnership was formed in 2009 to deliver improvements in the quality of life for the people of Aberdeen, particularly their health and well being in relation to alcohol and drugs. The partnership has recently updated their Alcohol Strategy in light of recent national policy developments and is keen to find out about alcohol availability, purchasing behaviour and associated attitudes in Aberdeen City.

We know that off-sales account for two-thirds of all alcohol sales across Scotland but the ADP would benefit greatly from having information at a local level. Panellists' responses will help to compare our city with nationally available statistics to help inform future local policy developments.

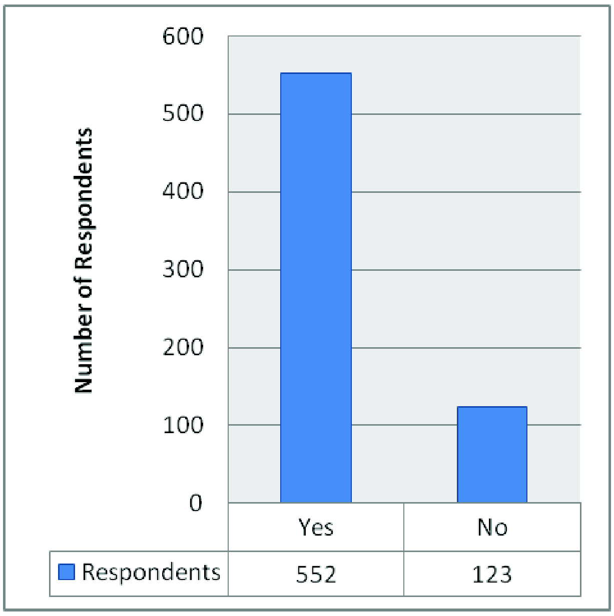
The following questions focus specifically on alcohol 'off-sales'. This refers to alcohol purchased to consume **outwith** pubs, bars, restaurants and clubs.

Alcohol Sales

The first question in this section sought to identify whether or not panellists had purchased off-sales alcohol anywhere that was not a pub, restaurant or club during the last 12 months. Their responses are provided below in Figure 14 (see page 56), which shows that 552 respondents (81.8%) have done so, whilst only 123 respondents (18.2%) have not.

Deeper scrutiny of these results shows that the proportion of male respondents who have purchased off-sales alcohol in the last 12 months (86.3%) was noticeably higher than the proportion of female respondents who have done likewise (77.7%). Some variation could be seen across neighbourhood areas, with the proportion of respondents who had bought off-sales alcohol highest in South (84.7%), followed by North (80.2%) and Central (79.6%). Younger panellists also seemed more likely to have purchased off-sales alcohol: the proportion of respondents who had done so was highest among those aged 16-34 (87.5%) and 35-54 (89.6%), falling to 80.7% of those aged 55-64 and just 68.1% of those aged 65+.

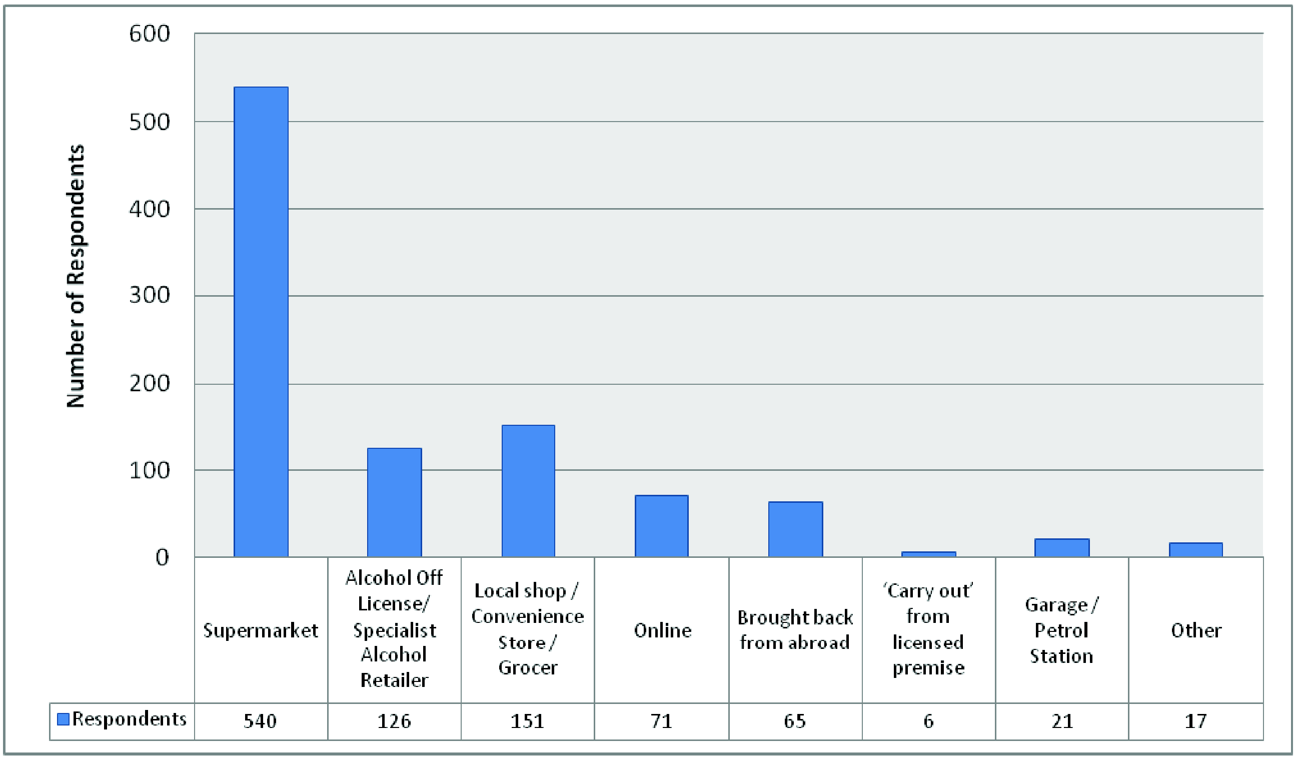
Figure 14: Have you purchased alcohol off-sales anywhere that is not a pub, bar, restaurant or club, in the last 12 months?



Base = 675 respondents

The 552 panellists from Figure 14 who had made a purchase of this nature in the previous year were subsequently asked to identify the type of sales outlet from which they purchased the alcohol. Their responses are provided below in Figure 15 (see page 57). The results show that by far the most frequently offered response was supermarket (540 respondents; 97.8%). Only one other option (local shop / convenience store / grocer – 151 respondents; 27.4%) was identified by more than a quarter of respondents. Among the remaining options, the most popular were an alcohol off-license / specialist alcohol retailer (126 respondents; 22.8%), online (71 respondents; 12.9%) and bringing alcohol back from abroad (65 respondents; 11.8%). Only 21 respondents (3.8%) had purchased alcohol from a garage / petrol station and even fewer had purchased a 'carry out' from licensed premises (6 respondents; 1.1%).

Figure 15: If you have purchased alcohol off-sales anywhere that is not a pub, bar, restaurant or club, in the last 12 months, where did you buy it?



Base = 552 respondents

17 respondents (3.1%) provided an 'other' response to the foregoing question. Their responses are laid out in more detail in Table 46 below. This shows that of these responses, the most popular were mail order companies (6 respondents; 1.1%), a 'cash and carry' or wholesaler (also 4 respondents; 0.7%), domestic duty free (i.e. internal flights) (3 respondents; 0.5%) and directly from a brewery or distillery (2 respondents; 0.4%). Two respondents provided details which were not relevant to the question.

Table 46: If you have purchased alcohol off-sales anywhere that is not a pub, bar, restaurant or club, in the last 12 months, where did you buy it? ('Other' responses)

Response	Respondents	
	Count	%
Mail order	6	1.1
Cash & Carry / Wholesaler	4	0.7
Duty Free (not abroad)	3	0.5
Brewery / Distillery	2	0.4
N/a	2	0.4

Base = 552 respondents

When disaggregating these results by gender (see Table 47 below), only two notable findings emerged. In each case, the option was selected by a larger proportion of male respondents than female respondents. The options in question were ‘alcohol off license / specialist alcohol retailer’ (26.4% of males and 19.5% of females) and ‘local shop / convenience store / grocer’ (29.0% of males and 25.4% of females).

Only two notable neighbourhood-related results emerged from this deeper analysis (see Table 48, page 59). The first was that a larger proportion of respondents in Central (31.5%) had purchased alcohol off-sales from an alcohol off license / specialist alcohol retailer than was the case for respondents in North (17.7%) and South (20.3%). In addition, the proportion of respondents in North who selected the ‘local shop / convenience store / grocer’ option (20.9%) was smaller than in South (29.7%) and Central (29.8%).

A small number of interesting age-group results were also found (see Table 49, page 59). Three correlations were identified: in each case, the proportion of respondents selecting the option in question was greatest among those aged 16-34, declining across each successively older age-group to its lowest point among those aged 65+. The options in question were ‘online’, ‘brought back from abroad’ and ‘carry out from licensed premise’. Two other notable results emerged. In relation to the ‘alcohol off license / specialist alcohol retailer’ option, the proportion of respondents aged 55-64 (13.0%) and 65+ (11.5%) selecting this option was much lower than among respondents aged 16-34 (28.6%) and 35-54 (32.8%). The same trend was also in evidence in relation to the ‘local shop / convenience store / grocer’ option, which was selected by 44.6% of those aged 16-34 and 32.8% of those aged 35-54, but by only 18.1% of those aged 55-64 and 17.7% of those aged 65+.

Table 47: If you have purchased alcohol off-sales anywhere that is not a pub, bar, restaurant or club, in the last 12 months, where did you buy it? (% by Gender)

Response	Gender	
	Male	Female
Supermarket	96.7	98.9
Alcohol Off License/ Specialist Alcohol Retailer	26.4	19.5
Local shop / Convenience Store / Grocer	29.0	25.4
Online	14.5	11.4
Brought back from abroad	13.8	9.9
‘Carry out’ from licensed premise	1.1	1.1
Garage / Petrol Station	3.6	4.0
Other	3.6	2.6

Base = multiple

Table 48: If you have purchased alcohol off-sales anywhere that is not a pub, bar, restaurant or club, in the last 12 months, where did you buy it? (% by Neighbourhood)

Response	Neighbourhood		
	North	**Central**	**South**
Supermarket	97.5	98.2	97.7
Alcohol Off License/ Specialist Alcohol Retailer	17.7	31.5	20.3
Local shop / Convenience Store / Grocer	20.9	29.8	29.7
Online	10.1	14.3	14.0
Brought back from abroad	13.9	12.5	9.9
'Carry out' from licensed premise	1.3	0.6	1.4
Garage / Petrol Station	1.3	4.8	5.0
Other	2.5	4.2	2.7

Base = multiple

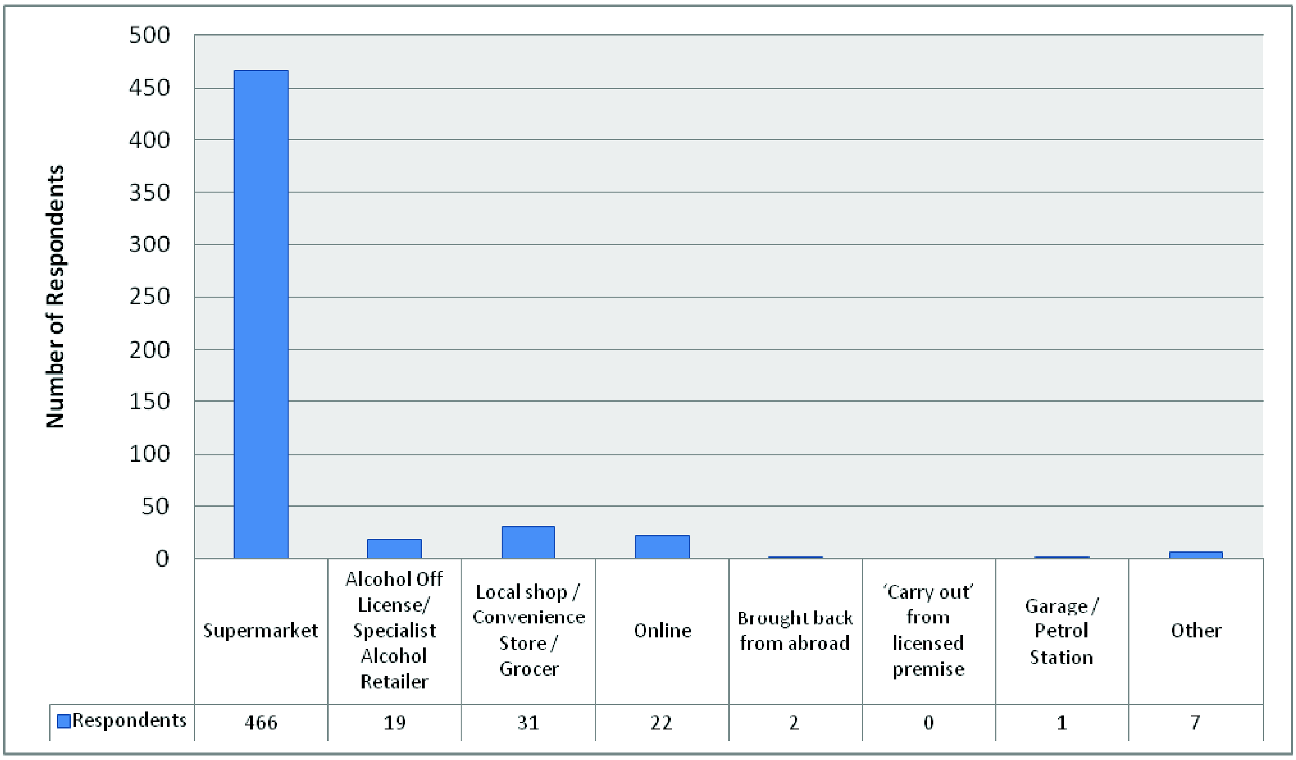
Table 49: If you have purchased alcohol off-sales anywhere that is not a pub, bar, restaurant or club, in the last 12 months, where did you buy it? (% by Age-Group)

Response	Age Group			
	16-34	**35-54**	**55-64**	**65+**
Supermarket	96.4	97.5	98.6	98.2
Alcohol Off License/ Specialist Alcohol Retailer	28.6	32.8	13.0	11.5
Local shop / Convenience Store / Grocer	44.6	32.8	18.1	17.7
Online	19.6	14.5	13.0	6.2
Brought back from abroad	16.1	13.3	10.1	8.8
'Carry out' from licensed premise	1.8	1.7	0.7	0.0
Garage / Petrol Station	3.6	6.2	2.9	0.0
Other	0.0	3.3	3.6	3.5

Base = multiple

The next question was also targeted at those 552 respondents who had earlier stated that they had bought off-sales alcohol in the previous 12 months (see Figure 14, page 56). They were asked to identify which of the aforementioned types of sales outlet was the one from which they most frequently purchased off-sales alcohol. Their responses are provided below in Figure 16 (see page 60). Again, the most popular answer by far was supermarket (466 respondents; 85.0%), with each of the remaining options being identified by less than 10.0% of respondents.

Figure 16: (Excluding pubs, bars, restaurants and clubs, which of the following do you buy alcohol from most FREQUENTLY?



Base = 548 respondents

Once again, a very small of respondents provided an 'other' response. These are laid out below in Table 50, which shows that the only valid 'other' responses were that 4 respondents (0.7%) most frequently purchase off-sales alcohol by mail order, and that 2 respondents (0.4%) do so from a 'cash and carry' or wholesaler.

Table 50: Excluding pubs, bars, restaurants and clubs, which of the following do you buy alcohol from most FREQUENTLY? ('Other' responses)

Response	Respondents	
	Count	%
Mail order	4	0.7
Cash & Carry / Wholesaler	2	0.4
N/a	1	0.2

Base = 548 respondents

There were virtually no differences between male and female respondents' answers (see Table 51, page 61). There were two exceptions. The proportion of female respondents selecting the supermarket option (89.6%) was greater than among males (80.7%), whilst the opposite was true in relation to the 'local shop / convenience store / grocer' option (8.0% of male respondents vs. 3.0% of females).

There were also few differences between neighbourhood areas (see Table 52, page 62), although it is perhaps worth noting that the proportion of respondents selecting the 'alcohol off license/ specialist alcohol retailer' option was largest in South (5.0%), followed by Central (3.0%) and North (1.9%), and that a slightly smaller proportion of respondents in Central (1.8%) selected the online option than in North (5.1%) and South (5.0%).

There were also not many notable age-related results (see Table 53, page 62). A smaller proportion of respondents aged 35-54 (78.6%) selected the supermarket option than among other age-groups (87.5% of those aged 16-34, 91.2% of those aged 55-64 and 90.3% of those aged 65+). A slightly larger proportion of respondents in the two youngest age-groups (8.9% of respondents aged 16-34 and 8.0% of those aged 35-54) selected the 'local shop / convenience store / grocer' option than in the two oldest age-groups (2.2% of those aged 55-64 and 2.7% of those aged 65+).

Table 51: Excluding pubs, bars, restaurants and clubs, which of the following do you buy alcohol from most FREQUENTLY? (% by Gender)

Response	**Gender**	
	Male	**Female**
Supermarket	80.7	89.6
Alcohol Off License/ Specialist Alcohol Retailer	4.4	2.6
Local shop / Convenience Store / Grocer	8.0	3.0
Online	4.7	3.3
Brought back from abroad	0.4	0.4
'Carry out' from licensed premise	0.0	0.0
Garage / Petrol Station	0.4	0.0
Other	1.5	1.1

Base = multiple

Table 52: Excluding pubs, bars, restaurants and clubs, which of the following do you buy alcohol from most FREQUENTLY? (% by Neighbourhood)

Response	Neighbourhood		
	North	Central	South
Supermarket	84.7	86.7	84.2
Alcohol Off License/ Specialist Alcohol Retailer	1.9	3.0	5.0
Local shop / Convenience Store / Grocer	7.0	6.0	4.1
Online	5.1	1.8	5.0
Brought back from abroad	0.6	0.6	0.0
'Carry out' from licensed premise	0.0	0.0	0.0
Garage / Petrol Station	0.0	0.0	0.5
Other	0.6	1.8	1.4

Base = multiple

Table 53: Excluding pubs, bars, restaurants and clubs, which of the following do you buy alcohol from most FREQUENTLY? (% by Age-Group)

Response	Age Group			
	16-34	35-54	55-64	65+
Supermarket	87.5	78.6	91.2	90.3
Alcohol Off License/ Specialist Alcohol Retailer	3.6	5.5	2.2	0.9
Local shop / Convenience Store / Grocer	8.9	8.0	2.2	2.7
Online	0.0	5.9	2.9	3.5
Brought back from abroad	0.0	0.4	0.0	0.9
'Carry out' from licensed premise	0.0	0.0	0.0	0.0
Garage / Petrol Station	0.0	0.4	0.0	0.0
Other	0.0	1.3	1.5	1.8

Base = multiple

The following questions are about where panellists most frequently buy off-sales alcohol as indicated in their responses above. The first question sought to establish why panellists buy their off-sales alcohol from their preferred locations. Their responses are provided below in Table 54 (see page 63). The results show that the most popular response (381 respondents; 69.0%) is that panellists buy their alcohol from their preferred outlet whilst shopping for other things – this is perhaps unsurprising, given the popularity of supermarkets as the primary source of off-sales alcohol (as indicated in the questions above). However, a sizable number of panellists (322; 58.3%) also state that price is a major factor in determining their primary choice of location for purchasing off-sales alcohol. Slightly less popular as a factor was convenience of location (248 respondents; 44.9%), as was the wide selection available at their preferred location (244 respondents; 44.2%). The only other factor identified by at least 10.0% of respondents was the convenience of opening hours (67 respondents; 12.1%). Perhaps surprisingly, the opportunity to purchase bulk deals was mentioned as a factor by only 30 respondents (5.4%).

Table 54: Why are you more likely to buy alcohol from there?

Response	Respondents	
	Count	%
I buy it whilst shopping for other things	381	69.0
Price	322	58.3
Convenience (of location)	248	44.9
Wide selection	244	44.2
Convenience (of opening hours)	67	12.1
Specific brand / type	48	8.7
Bulk deals	30	5.4
Local advertising (mailing / flyer)	3	0.5
Other	9	1.6

Base = 552 respondents

9 respondents selected the 'other' option in the question above. However, when asked to elaborate, 5 respondents (0.9%) provided information which was not relevant to the question. As such, the only valid 'other' responses were those from the 4 respondents (0.7%) who stated that the quality of product on offer was the main reason for being more likely to buy alcohol from their chosen type of outlet.

Tables 55-57 (see pages 64-65) show a breakdown of these results by gender, neighbourhood and age-group. Dealing firstly with gender, Table 55 (see page 64) shows that the most popular response for both males and females was the 'I buy it whilst shopping for other things' option, although a greater proportion of female respondents than male respondents selected this. The opposite was true in relation to the 'price', 'wide selection' and 'bulk deals' options. 'I buy it whilst shopping for other things' was also the most popular response in each neighbourhood (see Table 56, page 64). Most of the other notable neighbourhood results related to the different answers provided by respondents in South relative to their counterparts in North and Central. A slightly larger proportion of respondents in South selected the 'specific brand / type' (10.4%) than in North (7.0%) and Central (6.5%), but the opposite was true in relation to the 'price' (53.6% in South vs. 60.8% in North and 61.9% in Central), 'convenience (location)' (36.5% in South vs. 47.5% in North and 51.2% in Central) and 'wide selection' (39.6% in South vs. 48.7% in North and 47.0% in Central) options.

In terms of age-group, Table 57 (see page 65) shows that the most popular response for all cohorts was 'I buy it whilst shopping for other things'. There were no enormous differences between age-groups, although some notable results did emerge. In particular, the proportion of respondents aged 35-54 who selected the 'price' option (53.1%) was slightly smaller than in other age-groups (60.7% of respondents aged 16-34, 62.3% of those aged 35-54 and 62.8% of those aged 65+). Similarly, 'convenience (opening hours)' was identified as a factor by a slightly smaller proportion of respondents aged 55-64 (9.4%) than other age-groups (12.5% of those aged 16-34, 13.7% of those aged 35-54 and 12.4% of those aged 65+). There was also a fairly large spread between the proportion of respondents aged 16-34 (50.0%) and 65+ (38.9%) who chose the 'wide selection' option.

Table 55: Why are you more likely to buy alcohol from there? (% by Gender)

Response	Gender	
	Male	Female
I buy it whilst shopping for other things	60.5	77.6
Price	62.7	53.7
Convenience (of location)	44.9	43.4
Wide selection	47.5	41.5
Convenience (of opening hours)	12.0	12.5
Specific brand / type	7.6	8.8
Bulk deals	8.3	2.6
Local advertising (mailing / flyer)	1.1	0.0
Other	2.2	3.7

Base = multiple

Table 56: Why are you more likely to buy alcohol from there? (% by Neighbourhood)

Response	Neighbourhood		
	North	Central	South
I buy it whilst shopping for other things	67.7	72.0	67.6
Price	60.8	61.9	53.6
Convenience (of location)	47.5	51.2	36.5
Wide selection	48.7	47.0	39.6
Convenience (of opening hours)	8.9	11.9	14.9
Specific brand / type	7.0	6.5	10.4
Bulk deals	4.4	5.4	6.3
Local advertising (mailing / flyer)	0.0	0.6	0.9
Other	2.5	3.0	3.2

Base = multiple

Table 57: Why are you more likely to buy alcohol from there? (% by Age-Group)

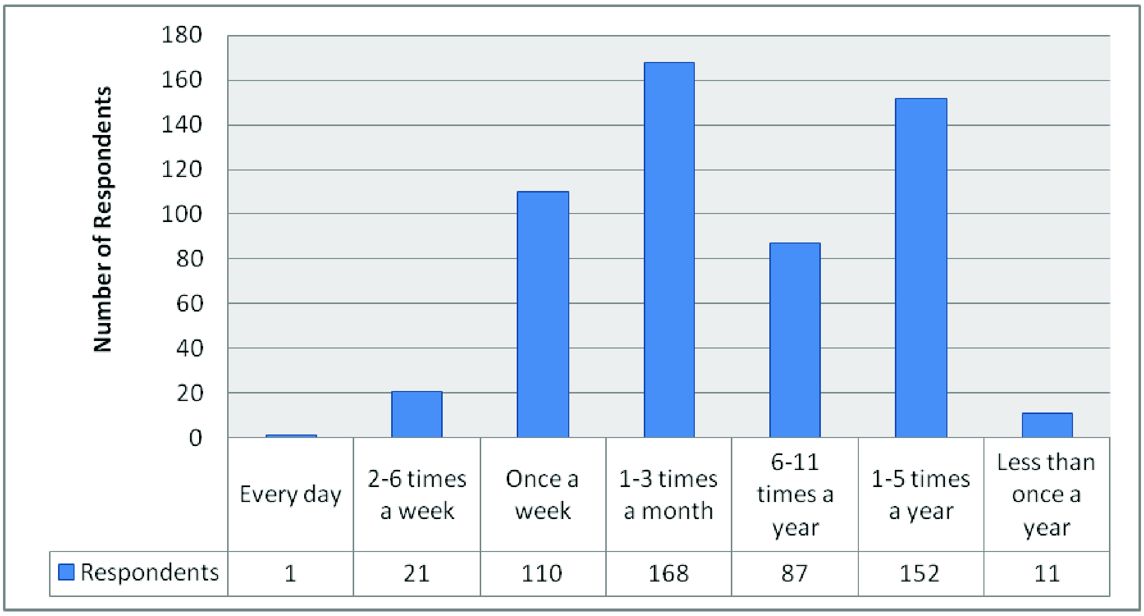
Response	Age Group

	16-34	35-54	55-64	65+
I buy it whilst shopping for other things	66.1	68.5	68.8	71.7
Price	60.7	53.1	62.3	62.8
Convenience (of location)	48.2	45.2	39.1	46.0
Wide selection	50.0	45.2	45.7	38.9
Convenience (of opening hours)	12.5	13.7	9.4	12.4
Specific brand / type	8.9	10.8	5.1	6.2
Bulk deals	5.4	3.3	8.7	6.2
Local advertising (mailing / flyer)	0.0	0.4	0.7	0.9
Other	1.8	2.9	3.6	2.7

Base = multiple

The 552 panellists (Figure 14, page 56) who have bought off-sales alcohol in the last 12 months were then asked how often they tend to buy off-sales alcohol from their preferred point of sale. Their responses are provided below in Figure 17, which shows that the most frequent responses are 1-3 times per month (168 respondents; 30.5%), 1-5 times per year (152 respondents; 27.6%), once a week (110 respondents; 20.0%) and 6-11 times per year (87 respondents; 15.8%). Very few respondents stated that they buy alcohol from their preferred outlet every day (1 respondent; 0.2%), 2-6 times a week (21 respondents; 3.8%) or less than once a year (11 respondents; 2.0%).

Figure 17: On average, how often do you buy alcohol there?



Base = 550 respondents

There was very little difference between male and female panellists' responses (see Table 58, page 66). Table 59 (see page 66) shows that the most popular response in North and Central was 1-3 times a month (31.6% and 28.3%, respectively). However, in South it was 1-5 times a year (32.0%). Other than this, the only particularly notable differences between neighbourhoods were the slightly larger proportion of respondents in Central (21.7%) who selected the '6-11 times a year' option, compared to 13.3% in North and 13.5% in South, and the slightly lower proportion in Central (19.9%) who selected the 1-5 times per year' option (compared to 29.7% in North and 32.0% in South).

The most popular response for respondents in the three youngest age-groups was '1-3 times per month' (see Table 60, page 67). However, for those aged 65+, the most popular response was '1-5 times a year'. Very slightly larger proportions of respondents aged 35-54 and 55-64 selected the '2-6 times a week' and 'once a week' options compared to those aged 16-34 and 65+. The proportion of respondents selecting the '1-5 times a year' option correlated with age-group: the proportion selecting this was highest among those aged 65+, falling across each successively younger age-group to its lowest point among those aged 16-34.

Table 58: On average, how often do you buy alcohol there? (% by Gender)

Response	Gender	
	Male	Female
Every day	0.4	0.0
2-6 times a week	5.1	2.6
Once a week	20.4	19.9
1-3 times a month	29.6	30.9
6-11 times a year	13.1	18.8
1-5 times a year	28.5	26.8
Less than once a year	2.9	1.1

Base = multiple

Table 59: On average, how often do you buy alcohol there? (% by Neighbourhood)

Response	Neighbourhood		
	North	Central	South
Every day	0.0	0.6	0.0
2-6 times a week	1.9	6.6	3.2
Once a week	22.8	19.3	18.9
1-3 times a month	31.6	28.3	30.6
6-11 times a year	13.3	21.7	13.5
1-5 times a year	29.7	19.9	32.0
Less than once a year	0.6	3.6	1.8

Base = multiple

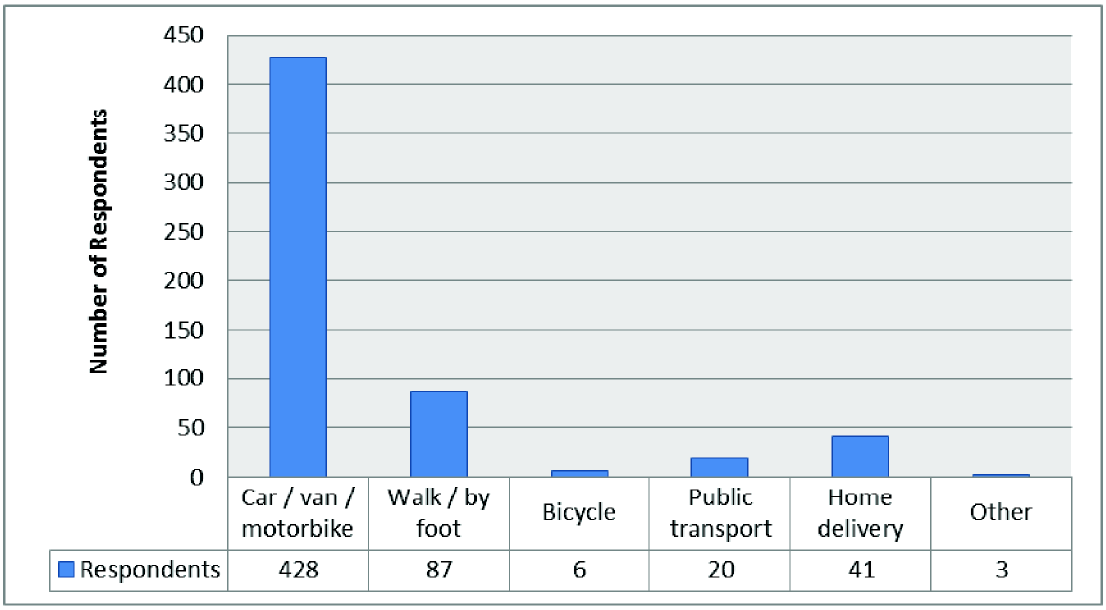
Table 60: On average, how often do you buy alcohol there? (% by Age-Group)

Response	Age Group			
	16-34	35-54	55-64	65+
Every day	0.0	0.4	0.0	0.0
2-6 times a week	1.8	5.8	3.6	0.9
Once a week	14.3	23.8	23.4	11.5
1-3 times a month	42.9	27.1	32.1	28.3
6-11 times a year	17.9	15.8	11.7	20.4
1-5 times a year	21.4	25.8	27.7	34.5
Less than once a year	1.8	1.3	1.5	4.4

Base = multiple

These same panellists were subsequently asked how they typically travel to the place where they most frequently purchase off-sales alcohol. Their responses are laid out below in Figure 18. The chart shows that the most popular responses were car / van / motorbike (428 respondents; 77.5%), walking / by foot (87 respondents; 15.8%), having the alcohol delivered at home (41 respondents; 7.4%) and public transport (20 respondents; 3.6%). Only 6 respondents (1.1%) stated that they generally travel by bicycle to purchase off-sales alcohol from their preferred outlet. 3 respondents (0.5%) selected the 'other' option. However, upon further analysis it became clear that their responses did not ultimately relate to the question, and were therefore discounted from any further analysis.

Figure 18: How do you generally travel there?



Base = 552 respondents

These results have also been disaggregated by gender, neighbourhood area and age-group below (see Tables 61-63). There were few notable differences between male and female panellists. The greatest divergences came in relation to the 'walk / by foot' option (selected by 19.6% of males but

11.8% of females) and the ‘public transport’ option (5.5% of females and 1.8% of males). There were also few differences across neighbourhoods (see Table 62 below). The most notable distinctions were found in relation to the ‘car / van / motorbike’ option (selected by 77.8% in North and 80.6% in South but 73.8% in Central), the ‘walk / by foot’ option (selected by only 10.4% in South and 15.8% in North, but by 22.6% in Central) and the ‘home delivery’ option (selected by 9.5% in South and 7.0% in North but only 4.8% in Central).

As with gender and neighbourhood, there were no dramatic differences between age-groups (see Table 63, page 69). The most notable of the small differences came in relation to the ‘car / van / motorbike’ option (selected by 82.1% of those aged 16-34 and 81.2% of those aged 55-64, but only 75.1% of those aged 35-54 and 77.0% of those aged 65+) and the ‘walk / by foot’ option (selected by 26.8% of those aged 16-34 but only 16.6% of those aged 35-54, 11.6% of those aged 55-64 and 13.3% of those aged 65+).

Table 61: How do you generally travel there? (% by Gender)

Response	Gender	
	Male	Female
Car / van / motorbike	76.8	78.7
Walk / by foot	19.6	11.8
Bicycle	1.4	0.7
Public transport	1.8	5.5
Home delivery	6.9	7.7
Other	2.2	1.1

Base = multiple

Table 62: How do you generally travel there? (% by Neighbourhood)

Response	Neighbourhood		
	North	Central	South
Car / van / motorbike	77.8	73.8	80.6
Walk / by foot	15.8	22.6	10.4
Bicycle	0.0	1.8	1.4
Public transport	3.2	4.2	3.6
Home delivery	7.0	4.8	9.5
Other	1.3	3.0	0.9

Base = multiple

Table 63: How do you generally travel there? (% by Age-Group)

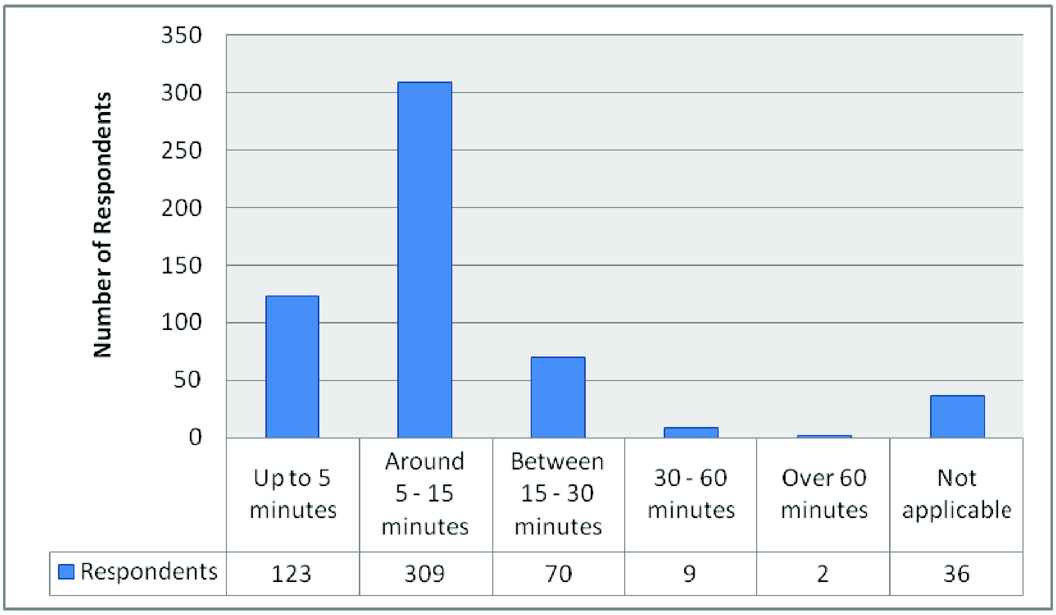
Response	Age Group

	16-34	35-54	55-64	65+
Car / van / motorbike	82.1	75.1	81.2	77.0
Walk / by foot	26.8	16.6	11.6	13.3
Bicycle	3.6	1.7	0.0	0.0
Public transport	5.4	3.3	2.2	5.3
Home delivery	3.6	9.1	7.2	5.3
Other	0.0	1.7	0.7	3.5

Base = multiple

The next question sought to determine how long it typically takes panellists to travel to the place where they most frequently purchase off-sales alcohol. Their responses are displayed below in Figure 19, which shows that the most common responses were around 5-15 minutes (309 respondents; 56.3%), up to 5 minutes (123 respondents; 22.4%) and between 15-30 minutes (70 respondents; 12.8%). Very few respondents stated that it took any longer than 30 minutes to travel to their preferred purchase location. 36 respondents (6.6%) provided a 'not applicable' response – this presumably is a reflection of the fact that a very similar number of respondents (41) in the previous question stated that they obtain their alcohol by home delivery.

Figure 19: On average, how long does it take to get there?



Base = 549 respondents

Given that the question of travel time is primarily a geographic one, we have not disaggregated these results by gender and age-group, but have instead focussed on the relevant issue of neighbourhood. Table 64 below shows that the most popular response in each neighbourhood area is 'around 5-15 minutes', although the proportion selecting this is larger in Central (68.7%) and South (55.7%) than in North (44.3%). Conversely, a noticeably larger proportion of respondents in North selected the ‘up to 5 minutes’ option (34.2%) than in Central (19.9%) and South (15.8%).

Table 64: On average, how long does it take to get there? (% by Neighbourhood)

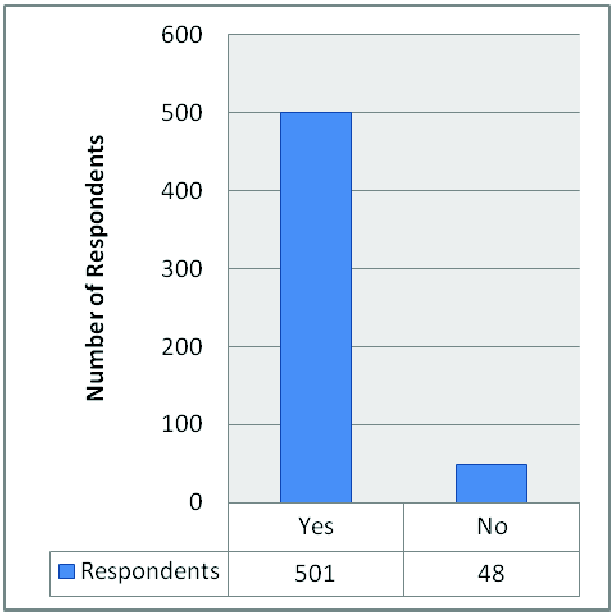
Response	Neighbourhood		
	North	Central	South
Up to 5 minutes	34.2	19.9	15.8
Around 5 -15 minutes	44.3	68.7	55.7
Between 15 – 30 minutes	10.8	7.2	18.1
30 – 60 minutes	2.5	0.0	2.3
Over 60 minutes	0.6	0.0	0.5
Not applicable	7.6	4.2	7.7

Base = multiple

Panellists were then asked whether or not they ever purchase alcohol as part of their grocery shopping. Their results are provided below in Figure 20 (see page 71), which shows that the vast majority of respondents (501; 91.3%) do purchase alcohol as part of their grocery shopping, whilst only a small minority (48 respondents; 8.7%) do not.

The proportion of female respondents who purchase alcohol as part of their grocery shopping (94.1%) was slightly larger than the proportion of male respondents who do so (88.7%). There was also some minor variance between the responses from different neighbourhood areas: the proportion of respondents answering ‘yes’ was highest in Central (94.0%) followed by North (92.9%) and South (88.2%). Although there was no clear age correlation in the responses received, there was nevertheless some difference between the responses from the different age-groups. The group containing the largest proportion of respondents who purchase alcohol as part of their grocery shopping was highest among those aged 55-64 (94.9%), falling to 92.9% of those aged 35-54, 86.6% of those aged 65+ and 85.7% of those aged 16-34.

Figure 20: Do you ever purchase alcohol as part of your grocery shopping?



Base = 549 respondents

The respondents who stated that they do purchase alcohol as part of their grocery shopping were then asked to identify which one of two statements best describes their alcohol buying habits. The two statements were:

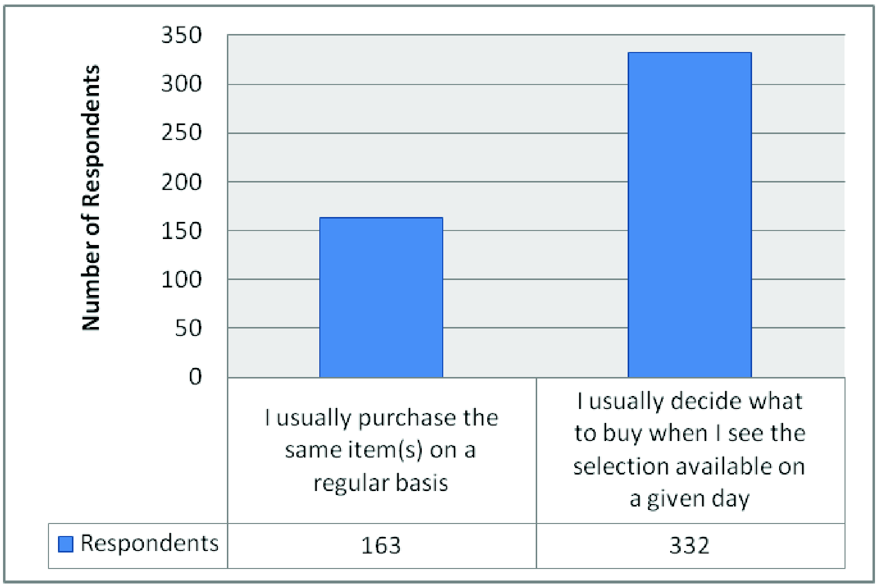
Statement A: I usually purchase the same item(s) on a regular basis

Statement B: I usually decide what to buy when I see the selection available on a given day

The results of this question are shown below in Figure 21 (see page 72). They show that just over two thirds of respondents (332; 67.1%) believe that Statement B most closely reflects their alcohol purchasing behaviour, whilst just under a third (163 respondents; 32.9%) opted for Statement A.

There was virtually no difference between the responses received from male and female panellists. However, the proportion of respondents selecting Statement A was slightly larger in North (36.8%) than in Central (31.0%) or South (32.1%). In terms of age, the proportion of respondents selecting Statement A was greatest among those aged 16-34 (41.7%), followed by those aged 55-64 (38.3%), those aged 65+ (34.0%) and those aged 35-54 (27.9%).

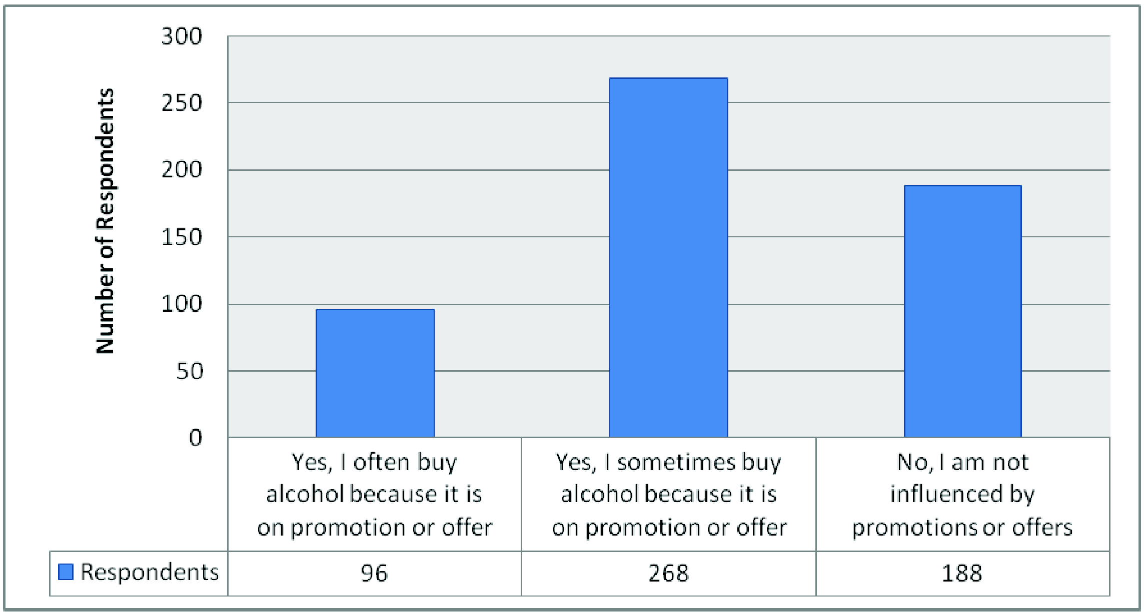
Figure 21: If yes, which of the following best describes your usual buying habits?



Base = 495 respondents

Similarly, the same group of panellists was then asked whether or not the type/brand of alcohol is influenced by instore promotions and offers. Panellists' responses are provided below in Figure 22, which shows that just under half of respondents stated that they sometimes buy alcohol because it is on promotion or offer. 96 respondents (17.4%) stated that they often buy a certain type/brand of alcohol because it is on promotion or offer. Conversely, 188 respondents (21.4%) stated that they are not influenced by promotions or offers.

Figure 22: Would you say that the TYPE/BRAND of alcohol you buy is influenced by instore alcohol promotions and offers?



Base = 552 respondents

These responses are further broken down by gender, neighbourhood area and age-group below (see Tables 65-67, page 74). In terms of gender, Table 65 below shows that the proportion of male respondents selecting the ‘yes, I often buy alcohol because it is on promotion or offer’ (18.5%) is slightly larger than among female respondents (16.2%). However, the proportion stating that they are not influenced is also larger (36.2 vs. 32.0% of female respondents).

Across neighbourhoods, some differences emerged (see Table 66, page 74). The most popular response in each neighbourhood is ‘yes, I sometimes buy alcohol because it is on promotion or offer’. The proportion of respondents selecting the ‘yes, I often buy alcohol because it is on promotion or offer’ response is similar in each neighbourhood, but the proportion of respondents selecting the ‘no, I am not influenced by promotions or offers’ answer is larger in North (40.5%) and South (36.5%) than in Central (25.0%). Conversely, the proportion of respondents in Central selecting the ‘yes, I sometimes buy alcohol because it is on promotion or offer’ response is larger than in North and South.

The most popular response in each age-group (see Table 67, page 74) is ‘yes, I sometimes buy alcohol because it is on promotion or offer’. However, the proportion selecting this option was noticeably larger among those aged 35-54 (53.9%) than other age-groups (46.4% of those aged 16-34, 43.5% of those aged 55-64 and 44.2% of those aged 65+). The proportion selecting the ‘no, I am not influenced by promotions or offers’ was greatest among those aged 65+ (42.5%) and lowest among those aged 35-54 (29.9%).

Table 65: Would you say that the TYPE/BRAND of alcohol you buy is influenced by instore alcohol promotions and offers? (% by Gender)

Response	**Gender**	
	Male	**Female**
Yes, I often buy alcohol because it is on…	18.5	16.2
Yes, I sometimes buy alcohol because it is on…	45.3	51.8
No, I am not influenced by promotions or offers	36.2	32.0

Base = multiple

Table 66: Would you say that the TYPE/BRAND of alcohol you buy is influenced by instore alcohol promotions and offers? (% by Neighbourhood)

Response	Neighbourhood		
	North	Central	South
Yes, I often buy alcohol because it is on…	15.8	17.9	18.0
Yes, I sometimes buy alcohol because it is on…	43.7	57.1	45.5
No, I am not influenced by promotions or offers	40.5	25.0	36.5

Base = multiple

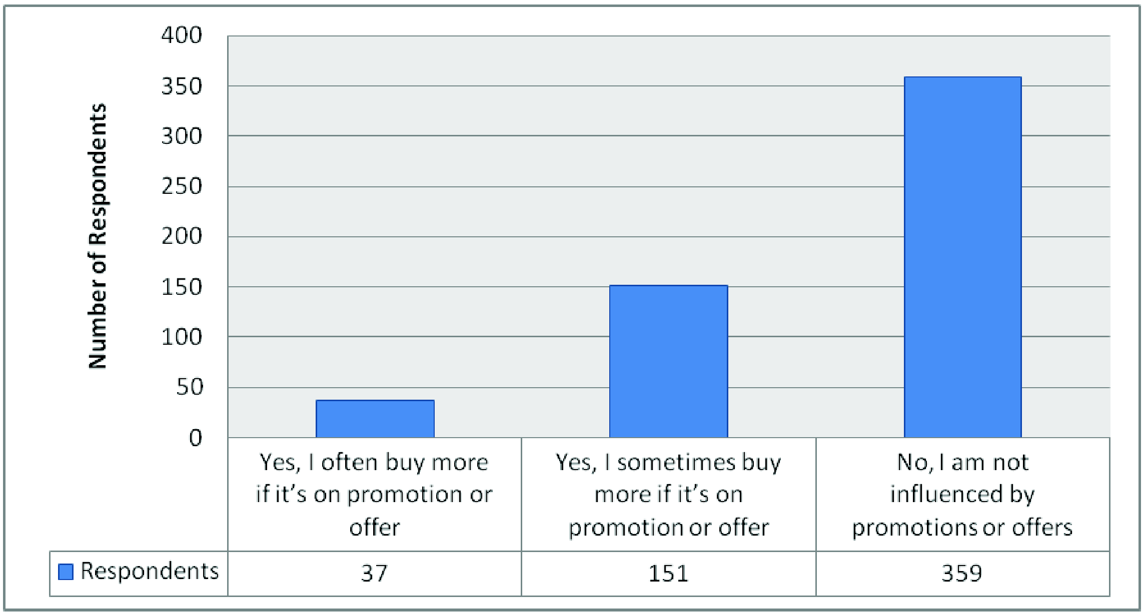
Table 67: Would you say that the TYPE/BRAND of alcohol you buy is influenced by instore alcohol promotions and offers? (% by Age-Group)

Response	Age Group			
	16-34	35-54	55-64	65+
Yes, I often buy alcohol because it is on…	23.2	16.2	20.3	13.3
Yes, I sometimes buy alcohol because it is on…	46.4	53.9	43.5	44.2
No, I am not influenced by promotions or offers	30.4	29.9	36.2	42.5

Base = multiple

These panellists were also asked whether the amount of alcohol they buy is influenced by instore alcohol promotions or offers. Their responses are laid out below in Figure 23 (see page 75). The chart shows that a very clear majority of respondents (359; 65.6%) state that the amount of alcohol they buy is not influenced by promotions or offers. Whilst 151 respondents (27.6%) stated that they sometimes buy more alcohol if it is on promotion or offer, only 37 respondents (6.8%) stated that they often buy more alcohol because it is on promotion or offer.

Figure 23: Would you say that the AMOUNT of alcohol you buy is influenced by instore alcohol promotions and offers?



Base = 547 respondents

There was very little difference between male and female respondents' answers (see Table 68 below), although a slightly larger proportion of males (66.4%) than females (64.3%) selected the 'no, I am not influenced by promotions or offers' option. Across different neighbourhoods (see Table 69, page 76), the most popular response was also 'no, I am not influenced by promotions or offers', with a slightly larger share of respondents in South selecting this option than in North or Central. The proportion of respondents stating that they often buy more alcohol because it is on promotion or offer was slightly larger in Central (10.9%) than in North (5.8%) and South (4.5%).

The 'no, I am not influenced by promotions or offers' response was the most popular one in every age-group (see Table 70, page 76), and was most pronounced in the 65+ age-group (71.8%) and least pronounced among those aged 16-34 (58.2%). The proportion of respondents selecting the 'yes, I often buy more if it's on promotion or offer' answer was greatest in the 16-34 (10.9%) and 55-64 (8.0%) age-groups.

Table 68: Would you say that the AMOUNT of alcohol you buy is influenced by instore alcohol promotions and offers? (% by Gender)

Response	Gender	
	Male	Female
Yes, I often buy more if it's on promotion or offer	6.9	6.7
Yes, I sometimes buy more if it's on promotion or offer	26.6	29.0
No, I am not influenced by promotions or offers	66.4	64.3

Base = multiple

Table 69: Would you say that the AMOUNT of alcohol you buy is influenced by instore alcohol promotions and offers? (% by Neighbourhood)

Response	Neighbourhood		
	North	Central	South
Yes, I often buy more if it's on promotion or offer	5.8	10.9	4.5
Yes, I sometimes buy more if it's on promotion or offer	28.8	31.5	24.3
No, I am not influenced by promotions or offers	65.4	57.6	71.2

Base = multiple

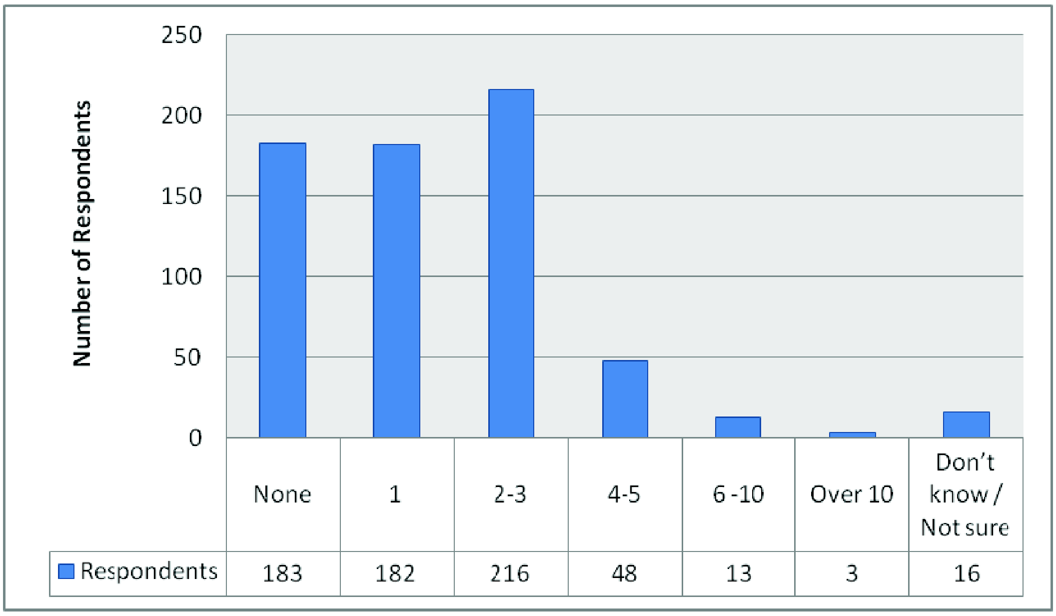
Table 70: Would you say that the AMOUNT of alcohol you buy is influenced by instore alcohol promotions and offers? (% by Age-Group)

Response	Age Group			
	16-34	35-54	55-64	65+
Yes, I often buy more if it's on promotion or offer	10.9	5.8	8.0	5.5
Yes, I sometimes buy more if it's on promotion or offer	30.9	29.2	28.3	22.7
No, I am not influenced by promotions or offers	58.2	65.0	63.8	71.8

Base = multiple

The next question was put to all panellists regardless of their purchases of off-sales alcohol over the past 12 months. They were asked roughly how many places off-sales alcohol (i.e. not from a pub, bar, restaurant or club) was available to buy within a 5 minute walk of their home. Figure 24 below (see page 77) sets out the responses received. The most popular response provided (216 respondents; 32.7%) was that there were 2-3 outlets within a 5 minute walk of panellists' homes. This was closely followed by no such outlets (27.7%) and 1 outlet (27.5%). Only 48 respondents (7.3%) stated that there were 4-5 possible places to buy off-sales alcohol within a 5 minute walk of their homes. A very small number of panellists stated that there were 6-10 such opportunities (13 respondents; 2.0%), and an even smaller number stated that there were more than 10 (3 respondents; 0.5%). 16 respondents (2.4%) did not know or were not sure.

Figure 24: If you wanted to buy off-sales alcohol (that is not from a pub, bar, restaurant, or club) roughly how many places could you potentially make a purchase from within a 5 MINUTE WALK of your home?



Base = 661 respondents

Once again, due to the geographic nature of this question, we have focussed here only on disaggregating these results by neighbourhood and not by gender and age-group. The results of doing so are laid out below in Table 71 (see page 78). The findings appear to show that those living in Central can count the greatest number of places to buy off-sales alcohol. The proportion of respondents selecting the 'none' response was greatest in South (35.8%) and North (30.1%), with the proportion much lower in Central (16.0%). A similarly low proportion of respondents in Central selected the '1' option (18.0%), whereas the proportions in North and South were 38.9% and 26.8% respectively. The greatest share of respondents in Central selected the '2-3' option, although the proportion in Central selecting the '4-5' option (12.6%) was also larger than in North (3.6%) and South (4.7%), whilst the same was true of the 6-10 option (4.9% of those living in Central, compared to 0.5% of those in North and 0.8% of those in South).

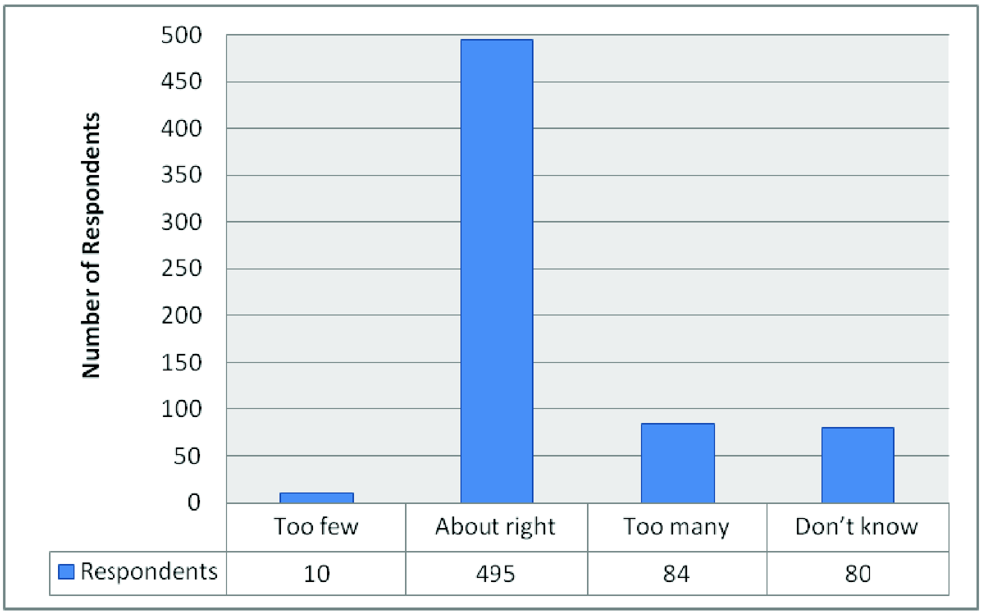
Table 71: If you wanted to buy off-sales alcohol (that is not from a pub, bar, restaurant, or club) roughly how many places could you potentially make a purchase from within a 5 MINUTE WALK of your home? (% by Neighbourhood)

Response	Neighbourhood		
	North	Central	South
None	30.1	16.0	35.8
1	38.9	18.0	26.8
2-3	23.8	45.6	29.2
4-5	3.6	12.6	4.7
6 -10	0.5	4.9	0.8
Over 10	0.5	1.0	0.0
Don't know / Not sure	2.6	1.9	2.7

Base = multiple

All panellists were then asked for their opinion on the number of places to buy alcohol in their local area. Figure 25 below shows that by far the most popular response from panellists was that they felt the number of places to be about right (495 respondents; 74.0%). Only 84 respondents (12.6%) said that there were too many, whilst even fewer (10 respondents; 1.5%) said that there were too few places. 80 respondents (12.0%) did not know.

Figure 25: Do you feel that the number of places to buy alcohol in your local area is….



Base = 669 respondents

There was very little difference between the responses given by male and female respondents to this question (see Table 72, page 79). However, when looking at different neighbourhoods, the proportion of respondents selecting the 'too many' option is larger in Central (17.2%) than in North (8.8%) and, to a lesser extent, South (11.9%) (see Table 73, page 79).

In terms of different age-groups (see Table 74 below), the proportion of respondents selecting the ‘too many’ option was largest among those aged 65+ (18.3%), followed by those aged 55-64 (12.5%), those aged 16-34 (10.9%) and those aged 35-54 (9.8%). It should also be noted that the proportion of respondents selecting the ‘don’t know’ option correlated with age-group, rising from a low of 4.7% of respondents in the 16-34 age-group to 9.8% of those aged 35-54 and 13.7% of those aged 55-64, to a high point of 17.1% of those aged 65+.

Table 72: Do you feel that the number of places to buy alcohol in your local area is…. (% by Gender)

Response	Gender	
	Male	Female
Too few	1.9	1.1
About right	75.2	72.5
Too many	12.4	12.9
Don’t know	10.5	13.5

Base = multiple

Table 73: Do you feel that the number of places to buy alcohol in your local area is…. (% by Neighbourhood)

Response	Neighbourhood		
	North	Central	South
Too few	1.6	1.0	1.2
About right	80.3	70.8	71.9
Too many	8.8	17.2	11.9
Don’t know	9.3	11.0	15.0

Base = multiple

Table 74: Do you feel that the number of places to buy alcohol in your local area is…. (% by Age-Group)

Response	Age Group			
	16-34	35-54	55-64	65+
Too few	0.0	1.5	0.6	1.8
About right	84.4	78.9	73.2	62.8
Too many	10.9	9.8	12.5	18.3
Don’t know	4.7	9.8	13.7	17.1

Base = multiple

We also crosstabulated the results of this question with the results from Figure 24 (see page 77), which sets out the number of off-sales alcohol outlets within a 5 minute walk of respondents' homes. Table 75 below shows that regardless of the number of outlets, only a very small number of respondents believe that there are too few places to buy off-sales alcohol in their area. However, as the number of outlets in an area increases, so the trend of respondents selecting the 'too many' option appears to increase. Going on these results alone, it is tempting to suggest that the optimal number of off-sales outlets within a 5 minute walk radius would be one: this is based on the fact that this option received the greatest proportion of 'about right' responses (85.7%) and the lowest number of 'too many' responses (6.0%). However, any such conclusion would also require other factors to be considered as well, such as local population, alcohol-related crime and anti-social behaviour etc. It should also be borne in mind that the overwhelming majority of respondents selected the 'about right' option. As such, the small number of cases on which the other options are based (see Figure 25, page 78) may be unreliable as a basis for generalisation.

Table 75: Do you feel that the number of places to buy alcohol in your local area is…. (% by Alcohol Off-Sales Outlets in Vicinity)

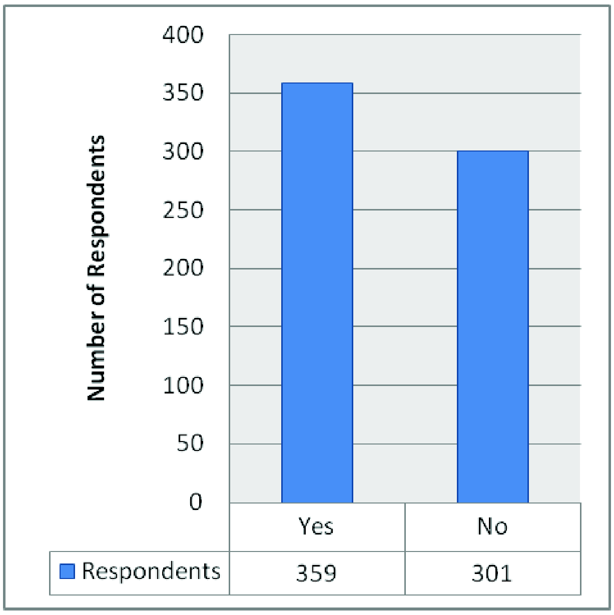
Response	Number of Off-Sales Alcohol Outlets						
	None	1	2 – 3	4 – 5	6 – 10	Over 10	Don't Know
Too few	2.2	0.5	0.9	2.1	0.0	0.0	0.0
About right	76.7	85.7	74.1	56.3	53.8	66.7	18.8
Too many	7.2	6.0	17.1	29.2	23.1	33.3	12.5
Don't know	13.9	7.7	7.9	12.5	23.1	0.0	68.8

Base = multiple

The next question asked all panellists whether or not they felt that the range of premises selling alcohol should be restricted. Figure 26 (page 81) shows that a small majority (359 respondents; 54.4%) agreed that they should be restricted, whilst the remainder (301 respondents; 45.6%) believed that they should not.

The proportion of respondents who supported restriction on the range of premises selling alcohol was slightly larger among female panellists (56.8%) than their male counterparts (52.3%). In different areas of the city, support for restrictions was greatest in Central (57.4%), although this was not considerably larger than in North (52.9%) or South (53.5%). Looking at different age-groups, the proportion supporting restrictions was far larger among those aged 65+ (71.5%) and 55-64 (59.9%) than among those aged 16-34 (47.6%) and 35-54 (42.6%).

Figure 26: In your opinion, do you think the range of premises selling alcohol should be restricted?



Base = 660 respondents

The panellists who answered 'yes' to the foregoing question were then asked to state which type of establishments should not be permitted to sell alcohol. Panellists were given a pre-defined list, but were also invited to make 'other' suggestions. The responses received are provided below in Tables 76 and 77 (see page 82).

Table 76 (page 82) shows that a very clear majority of respondents to this question (327; 91.1%) believe that garages / petrol stations should not be permitted to sell alcohol. 140 respondents (39.0%) stated that local shops / convenience stores / grocers should not be permitted to sell alcohol, whilst 127 respondents (35.4%) thought likewise in relation to online retailers. 56 respondents (15.6%) believed that supermarkets should not be permitted to sell alcohol, whilst 21 respondents (5.8%) stated that alcohol off-licenses / specialist alcohol retailers should not be permitted to sell alcohol.

Table 76: If you think the range of premises selling alcohol should be restricted, which of the following should NOT be permitted to sell alcohol?

Response	Respondents	
	Count	%
Garage / Petrol Station	327	91.1
Local shop / Convenience Store / Grocer	140	39.0
Online retailers (website)	127	35.4
Supermarket	56	15.6
Alcohol Off License/ Specialist Alcohol Retailer	21	5.8
Other	13	3.6

Base = 359 respondents

13 respondents selected the 'other' option for the above question. However, when asked to elaborate, only 10 respondents did so. Of these, 7 responses were not relevant to the question at hand. Of the remaining responses, 1 respondent (0.3%) stated that all of the above options should be prevented from selling alcohol, another (0.3%) stated that no outlets should be allowed to sell alcohol in areas know to have problems with alcohol-related anti-social behaviour, and another (0.3%) that alcohol should not be sold anywhere near children's playparks or OAPs' homes.

Table 77: If you think the range of premises selling alcohol should be restricted, which of the following should NOT be permitted to sell alcohol? ('Other' responses)

Response	Respondents	
	Count	%
Anywhere in areas known to be anti-social behaviour hotspots	1	0.3
All of the above options	1	0.3
Anywhere near children's playparks or OAPs' homes	1	0.3
N/a	7	1.9

Base = 359 respondents

For many of the options, there was very little difference between male and female respondents' answers. Table 78 (see page 83) below shows that the biggest differences were found in relation to the 'local shop / convenience store / grocer' and 'online retailers (website)' options. The proportion of female respondents selecting the former option (44.4%) was larger than the proportion of male respondents doing likewise (32.7%), whilst the opposite was true in relation to the latter option (39.5% of male respondents vs. 31.6% of female respondents).

Responses were also very similar across different neighbourhoods (see Table 79, page 83). Again, there were two exceptions: the proportion of respondents in Central selecting the 'local shop / convenience store / grocer' option' (47.0%) was larger than in North (35.6%) and South (35.5%).

The same was true in relation to the 'supermarket' option (20.5% of respondents in Central, compared to 13.9% of respondents in North and 12.3% in South).

Table 80 (page 84) shows that the 'local shop / convenience store / grocer' option' was also one of the only notable differences between age-groups: this was selected by a greater proportion of respondents in the 16-34 age-group (53.3%) than in the other age-groups (40.7% of those aged 35-54, 38.0% of those aged 55-64 and 35.4% of those aged 65+). Support for restricting the ability of online retailers (websites) to sell alcohol correlated with age, from a low of 30.0% of respondents aged 16-34 to 31.0% of those aged 35-54, 36.0% of those aged 55-64 and 40.7% of those aged 65+. The only other notable result was that a slightly lower proportion of respondents aged 35-54 selected the 'supermarket' option (9.7%) than in other age-groups (13.3% of those aged 16-34, 17.0% of those aged 55-64 and 20.4% of those aged 65+).

Table 78: If you think the range of premises selling alcohol should be restricted, which of the following should NOT be permitted to sell alcohol? (% by Gender)

Response	Gender	
	Male	Female
Garage / Petrol Station	90.1	91.3
Local shop / Convenience Store / Grocer	32.7	44.4
Online retailers (website)	39.5	31.6
Supermarket	17.3	13.8
Alcohol Off License/ Specialist Alcohol Retailer	6.8	4.1
Other	4.3	4.6

Base = multiple

Table 79: If you think the range of premises selling alcohol should be restricted, which of the following should NOT be permitted to sell alcohol? (% by Neighbourhood)

Response	Neighbourhood		
	North	Central	South
Garage / Petrol Station	92.1	88.0	92.0
Local shop / Convenience Store / Grocer	35.6	47.0	35.5
Online retailers (website)	35.6	37.6	33.3
Supermarket	13.9	20.5	12.3
Alcohol Off License/ Specialist Alcohol Retailer	4.0	6.0	4.3
Other	1.0	4.3	5.8

Base = multiple

Table 80: If you think the range of premises selling alcohol should be restricted, which of the following should NOT be permitted to sell alcohol? (% by Age-Group)

Response	Age Group			
	16-34	**35-54**	**55-64**	**65+**
Garage / Petrol Station	90.0	91.2	89.0	92.0
Local shop / Convenience Store / Grocer	53.3	40.7	38.0	35.4
Online retailers (website)	30.0	31.0	36.0	40.7
Supermarket	13.3	9.7	17.0	20.4
Alcohol Off License/ Specialist Alcohol Retailer	3.3	4.4	6.0	4.4
Other	3.3	4.4	7.0	0.9

Base = multiple

Drinking at Home

The next question – which was put to all panellists – asked about the main factors which influence people to drink alcohol in the home rather than at a licensed premise. A range of options was provided, but again panellists were invited to provide any 'other' suggestions they felt might be relevant. The responses received are provided below in Tables 81 and 82 (see pages 85-86).

Firstly, Table 85 deals with the pre-defined responses available to panellists. Of these, the most popular were the cost of going out for a drink (424 respondents; 62.3%), the convenience of staying at home to drink (420 respondents; 61.7%), changing lifestyles (334 respondents; 49.0%), the difficulty of getting out to or getting home from a licensed premise (116 respondents; 17.0%), the pricing of and promotions on off-sales alcohol (108 respondents; 15.9%) and personal safety (99 respondents; 14.5%).

Table 81: What do you think are the main factors that influence people to drink alcohol in the home rather than at a licensed premise?

Response	Respondents	
	Count	%
Cost of going out for a drink	424	62.3
Convenience	420	61.7
Changing lifestyles, e.g. home entertaining	334	49.0
Difficulty getting out to venue / getting home from venue	116	17.0
Pricing and promotions of off-sales alcohol	108	15.9
Personal safety	99	14.5
Because you can smoke	85	12.5
Transport (cost)	74	10.9
Transport (availability)	68	10.0
Lack of suitable venue(s)	28	4.1
Other	59	8.7

Base = 681 respondents

59 respondents to the question above selected the ‘other’ option. The further details provided by these respondents are provided below in Table 82 (page 86). It shows that the most popular ‘other’ suggestion received was the greater degree of comfort / relaxation involved in drinking alcohol at home (16 respondents; 2.3%). This was followed by the desire not to fall foul of drink-driving laws (7 respondents; 1.0%), the desire to have a drink with a meal at home (5 respondents; 0.7%) and responsibilities associated with caring for family members (5 respondents; 0.7%). Each remaining suggestion was mentioned by fewer than 5 respondents, whilst 15 respondents (2.2%) provided responses which had no relevance to the question at hand.

Table 82: What do you think are the main factors that influence people to drink alcohol in the home rather than at a licensed premise? ('Other' responses)

Response	Respondents	
	Count	%
Comfort / relaxation	16	2.3
Drink-driving laws	7	1.0
Drinking with a meal	5	0.7
Caring responsibilities	5	0.7
Alcoholism / drinking culture	4	0.6
Personal issues	3	0.4
Type of alcohol available	1	0.1
Weather	1	0.1
Better availability of off-sales alcohol	1	0.1
N/a	15	2.2

Base = 681 respondents

The responses from Table 81 (page 85) can also be disaggregated by gender, neighbourhood and age-group (see Tables 83-85, pages 87-88). There were few major differences between male and female panellists (Table 83, page 87). For females, the most popular answer was the cost of going out for a drink (60.6% vs. 63.2% of male respondents), whilst for males the most popular option was convenience (64.4% vs. 58.9% of female respondents).

In Central and South, the most popular factor was convenience (64.9% and 62.7% respectively) (see Table 84, page 87). In North, the most popular factor was the cost of going out for a drink (64.5%). This option was also selected by a slightly smaller proportion of respondents in South (58.9%) than in North and Central (63.5%). Convenience was selected by a slightly smaller proportion of respondents in North (57.0%) than in South and Central. However, in Central, a larger proportion of respondents than in North and South selected the 'changing lifestyles' and 'pricing and promotions of off-sales alcohol' options.

The most popular response for the three youngest age-groups was the cost of going out for a drink (see Table 85, page 88). This factor correlated with age-group, falling from a high of 79.7% of respondents aged 16-34 to 64.0% of those aged 35-54, 59.9% of those aged 55-64 and 54.2% of those aged 65+. For this oldest age-group, the most popular factor was convenience (65.1%). Another weak correlation emerged in relation to the 'lack of suitable venues' option, which was selected by 7.8% of respondents aged 16-34, falling to 4.0% of those aged 35-54, 3.5% of those aged 55-64 and 3.0% of those aged 65+. A small number of additional interesting results emerged. A slightly smaller proportion of respondents aged 35-54 (14.7%) and 65+ (12.0%) selected the 'pricing and promotions of off-sales alcohol' option than was the case in the other two age-groups

(23.4% of those aged 16-34 and 18.0% of those aged 55-64). The proportion of respondents aged 55-64 selecting the 'because you can smoke' option (19.8%) was larger than in other age-groups (6.3% of those aged 16-34, 12.5% of those aged 35-54 and 6.6% of those aged 65+). Finally, the proportion of respondents aged 55-64 (40.1%) and 65+ (45.2%) selecting the changing lifestyles option was smaller than among those aged 16-34 (51.6%) and 35-54 (55.9%).

Table 83: What do you think are the main factors that influence people to drink alcohol in the home rather than at a licensed premise? (% by Gender)

Response	Gender	
	Male	Female
Cost of going out for a drink	63.2	60.6
Convenience	64.4	58.9
Changing lifestyles, e.g. home entertaining	46.7	50.4
Difficulty getting out to /getting home from venue	18.0	16.4
Pricing and promotions of off-sales alcohol	17.3	14.2
Personal safety	17.0	12.5
Because you can smoke	10.5	14.4
Transport (cost)	10.5	11.3
Transport (availability)	9.3	10.8
Lack of suitable venue(s)	3.4	4.5
Other	7.7	10.8

Base = multiple

Table 84: What do you think are the main factors that influence people to drink alcohol in the home rather than at a licensed premise? (% by Neighbourhood)

Response	Neighbourhood		
	North	Central	South
Cost of going out for a drink	64.5	63.5	58.9
Convenience	57.0	64.9	62.7
Changing lifestyles, e.g. home entertaining	47.0	53.6	46.4
Difficulty getting out to /getting home from venue	15.5	16.6	19.0
Pricing and promotions of off-sales alcohol	12.0	19.4	15.6
Personal safety	16.5	14.2	12.9
Because you can smoke	12.0	14.7	10.6
Transport (cost)	14.0	9.0	10.3
Transport (availability)	12.0	10.4	8.4
Lack of suitable venue(s)	3.5	3.3	4.9
Other	9.0	9.5	9.5

Base = multiple

Table 85: What do you think are the main factors that influence people to drink alcohol in the home rather than at a licensed premise? (% by Age-Group)

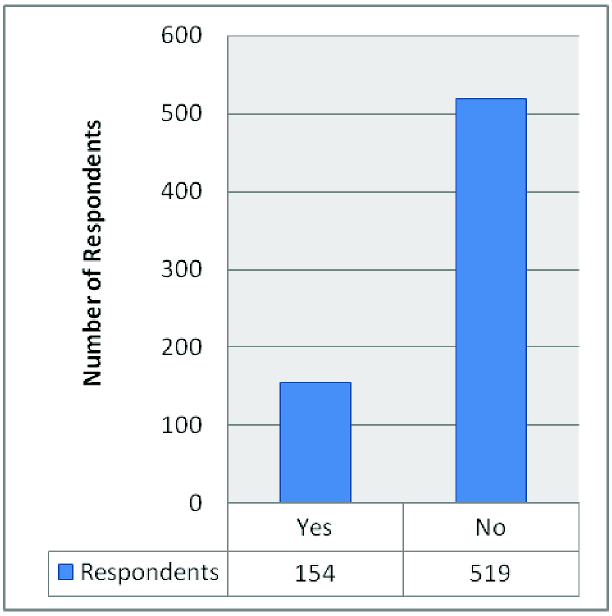
Response	**Age Group**			
	16-34	**35-54**	**55-64**	**65+**
Cost of going out for a drink	79.7	64.0	59.9	54.2
Convenience	64.1	60.7	59.3	65.1
Changing lifestyles, e.g. home entertaining	51.6	55.9	40.1	45.2
Difficulty getting out to /getting home from venue	21.9	17.3	16.3	16.3
Pricing and promotions of off-sales alcohol	23.4	14.7	18.0	12.0
Personal safety	12.5	14.3	12.8	16.9
Because you can smoke	6.3	12.5	19.8	6.6
Transport (cost)	14.1	10.7	12.2	9.0
Transport (availability)	12.5	8.5	8.7	13.3
Lack of suitable venue(s)	7.8	4.0	3.5	3.0
Other	6.3	10.7	9.3	8.4

Base = multiple

All panellists were then asked whether in the last 12 months they had had a few drinks at home or at a friend's house before going out to a pub, bar, restaurant or club. Their responses are laid out below in Figure 27, which shows that more than three quarters of respondents (519; 77.1%) have not done so. Conversely, 154 respondents (22.9) have done.

A slightly larger proportion of female respondents (24.1%) than male respondents (21.0%) have had a few drinks in this way. The proportion of respondents who have done so in North (18.7%) was smaller than in South (23.1%) and Central (25.7%). There was also a very clear correlation between age-group and responses received, in that the proportion of respondents answering 'yes' was in indirect variation with the age profile of a specific group (i.e. the higher the age, the lower the proportion answering 'yes'). As such, whilst 54.7% of respondents aged 16-34 have had a few drinks in this way, this falls to 28.3% of those aged 35-54, 15.3% of those aged 55-64 and just 8.5% of those aged 65+.

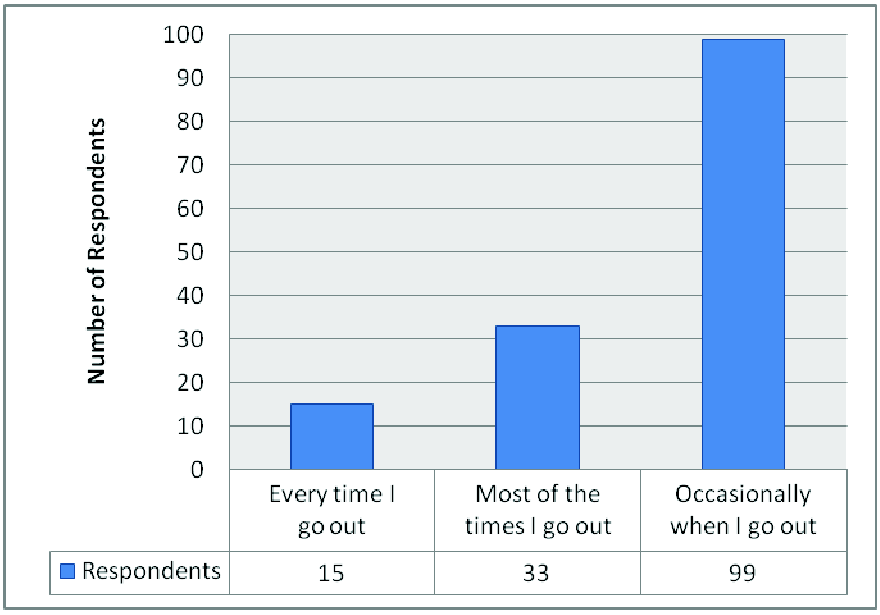
Figure 27: Over the last 12 months, have you had a few drinks at home or at a friend's house before going out to a pub, bar, restaurant or club?



Base = 673 respondents

The 154 respondents from the previous question who stated that they had had a drink at home or at a friend's house prior to going out to a pub, bar, restaurant or club were then asked how often they would typically do this. The results are provided below in Figure 28. The chart shows that most respondents (99; 67.3%) state that they would do this occasionally when they go out. 33 respondents (22.4%) stated that they do it most times when they go out, whilst only 15 respondents (10.2%) state that they do so every time they go out.

Figure 28: If you have had a few drinks at home or at a friend's house before going out to a pub, bar, restaurant or club over the last 12 month, how often would you do this?



Base = 147 respondents

These results are further broken down by gender, neighbourhood and age-group in Tables 86-88 (page 91). In terms of gender (see Table 86 below), the proportion of respondents stating ‘every time’ was larger among female respondents (12.3%) than males (6.3%). The same was true of the ‘most times’ option (24.7% of females vs. 20.6% of males), whilst the opposite was true in relation to the ‘occasionally’ option (73.0% of male respondents vs. 63.0% of females).

The most popular response in each neighbourhood was ‘occasionally’, although the proportion selecting this was largest in North (72.2%) followed by South (68.4%) and Central (62.7%) (see Table 87, page 91). The proportion selecting ‘every time’ was largest in Central (11.8%) and North (11.1%), and smaller in South (7.0%). The proportion selecting ‘most times’ was smallest in North (16.7%), rising to 24.6% in South and 25.5% of respondents in Central.

The most popular response in each age-group was ‘occasionally’ (see page 88, page 91). This response appear to correlate strongly with age-group, rising from a low of just 50.0% of respondents aged 16-34 to 69.9% of those aged 35-54, 75.0% of those aged 55-64 and 84.6% of those aged 65+. The ‘most times’ option also correlated with age-group, albeit more weakly and in the opposite direction, falling from a high of 29.4% of respondents aged 16-34 to 23.3% of those aged 35-54, 16.7% of those aged 55-64 and 15.4% of those aged 65+. The proportion of respondents selecting the ‘every time’ option was highest among those aged 16-34 (20.6%), followed by those aged 55-64 (8.3%) and those aged 35-54 (6.8%). No respondents aged 65+ selected this option (0.0%).

Table 86: If you have had a few drinks at home or at a friend’s house before going out to a pub, bar, restaurant or club over the last 12 month, how often would you do this? (% by Gender)

Response	Gender	
	Male	Female
Every time I go out	6.3	12.3
Most of the times I go out	20.6	24.7
Occasionally when I go out	73.0	63.0

Base = multiple

Table 87: If you have had a few drinks at home or at a friend's house before going out to a pub, bar, restaurant or club over the last 12 month, how often would you do this? (% by Neighbourhood)

Response	Neighbourhood		
	North	Central	South
Every time I go out	11.1	11.8	7.0
Most of the times I go out	16.7	25.5	24.6
Occasionally when I go out	72.2	62.7	68.4

Base = multiple

Table 88: If you have had a few drinks at home or at a friend's house before going out to a pub, bar, restaurant or club over the last 12 month, how often would you do this? (% by Age-Group)

Response	Age Group			
	16-34	35-54	55-64	65+
Every time I go out	20.6	6.8	8.3	0.0
Most of the times I go out	29.4	23.3	16.7	15.4
Occasionally when I go out	50.0	69.9	75.0	84.6

Base = multiple

The next question was also directed at these 154 respondents from Figure 27 (see page 89). These panellists were asked what the one major reason was for having had a few drinks at home or at a friend's house prior to going out to a pub, bar, restaurant or club. Their responses are provided below in Table 90 (see page 92), which shows that there were two particularly popular responses: these were the price of alcohol in licensed premises (51 respondents; 34.0%) and to get 'into the mood' (48 respondents; 32.0%). Beyond these, no response was identified by more than 10.0% of respondents.

Table 89: If you <u>have</u> had a few drinks at home or at a friend's house before going out to a pub, bar, restaurant or club over the last 12 month, what is the major reason that you do this?

Response	Respondents	
	Count	%
The price of alcohol in licensed premises	51	34.0
To get 'into the mood'	48	32.0
I like drinking and it's part of my routine	11	7.3
I can smoke in my home / friend's house	8	5.3
Because my friends all do it	6	4.0
Other	26	17.3

Base = 150 respondents

26 respondents selected the 'other' option in the above question. Their responses have been categorised thematically and are provided below in Table 90. The table shows that 12 of these responses were not relevant to the question. Of the remaining responses, 7 panellists (4.7%) stated that it was more sociable to have a drink at home or at a friend's house, 5 respondents (3.3%) stated that they did so simply to pass the time whilst meeting up or getting ready to go out, 4 respondents (2.7%) stated that they did so for reasons of comfort / relaxation / privacy, whilst 1 respondent (0.7%) stated that they had done so for reasons of safety.

Table 90: If you <u>have</u> had a few drinks at home or at a friend's house before going out to a pub, bar, restaurant or club over the last 12 month, what is the major reason that you do this? ('Other' responses)

Response	Respondents	
	Count	%
More sociable	7	4.7
Whilst meeting up / getting ready	5	3.3
Comfort / relaxation / privacy	4	2.7
Safety	1	0.7
N/a	12	8.0

Base = 150 respondents

These results are disaggregated below (see Tables 91-93, pages 93-94) by gender, neighbourhood area and age-group. The most popular response for male respondents was the price of alcohol in licensed premises (38.5%, compared to 28.0% of females) but for female respondents, the most popular was to get into the mood (34.1%, compared to 29.2% of male respondents). Beyond this, there were no major differences between the genders (see Table 91, page 93).

The most popular response in South was the price of alcohol in licensed premises (29.3%), whereas in North it was to get into the mood (35.1%) (see Table 92, page 94). In Central, an identical proportion selected each of the aforementioned factors (38.5%). It is perhaps also worth noting that the proportion of respondents in Central selecting 'the price of alcohol in licensed premises' was larger than in North and South. The proportion of respondents in South selecting 'to get into the mood' was smaller in South than in North and Central. The opposite was true in relation to the 'because all my friends do it' option. Finally, the proportion selecting the 'I can smoke in my home / friend's house' option was larger in North than in South, with the proportion in Central falling between the two.

A number of interesting age-related results emerged also (see Table 93, page 94). The most popular response for those aged 35-54 was to get into the mood (34.7%). For each of the other age-groups, the most popular response was the price of alcohol in licensed premises (41.2% of those aged 16-34, 36.0% of those aged 55-64 and 38.5% of those aged 65+). The proportion of those aged 35-54 selecting this option was noticeably lower (26.7%). Similarly, the proportion of respondents aged 55-64 who selected the 'to get into the mood' option was lower than the other three age-groups. The proportion of respondents selecting the 'because my friends all do it' option was – perhaps surprisingly – higher among those aged 55-64 (8.0%) and 65+ (15.4%) than those aged 16-34 (2.9%) and 35-54 (1.3%). Finally, whilst no respondents aged 16-34 and 65+ selected the 'I can smoke in my home / friend's house' option, it was selected by 8.0% of respondents in each of the 35-54 and 55-64 age-groups.

Table 91: If you have had a few drinks at home or at a friend's house before going out to a pub, bar, restaurant or club over the last 12 month, what is the major reason that you do this? (% by Gender)

Response	Gender	
	Male	Female
The price of alcohol in licensed premises	38.5	28.0
To get 'into the mood'	29.2	34.1
I like drinking and it's part of my routine	4.6	9.8
I can smoke in my home/ friend's house	4.6	6.1
Because my friends all do it	7.7	1.2
Other	15.4	20.7

Base = multiple

Table 92: If you have had a few drinks at home or at a friend's house before going out to a pub, bar, restaurant or club over the last 12 month, what is the major reason that you do this? (% by Neighbourhood)

Response	Neighbourhood		
	North	Central	South
The price of alcohol in licensed premises	29.7	38.5	29.3
To get 'into the mood'	35.1	38.5	24.1
I like drinking and it's part of my routine	5.4	3.8	12.1
I can smoke in my home/ friend's house	8.1	5.8	3.4
Because my friends all do it	0.0	1.9	8.6
Other	21.6	11.5	22.4

Base = multiple

Table 93: If you have had a few drinks at home or at a friend's house before going out to a pub, bar, restaurant or club over the last 12 month, what is the major reason that you do this? (% by Age-Group)

Response	Age Group			
	16-34	35-54	55-64	65+
The price of alcohol in licensed premises	41.2	26.7	36.0	38.5
To get 'into the mood'	32.4	34.7	24.0	30.8
I like drinking and it's part of my routine	8.8	6.7	12.0	0.0
I can smoke in my home/ friend's house	0.0	8.0	8.0	0.0
Because my friends all do it	2.9	1.3	8.0	15.4
Other	14.7	22.7	12.0	15.4

Base = multiple

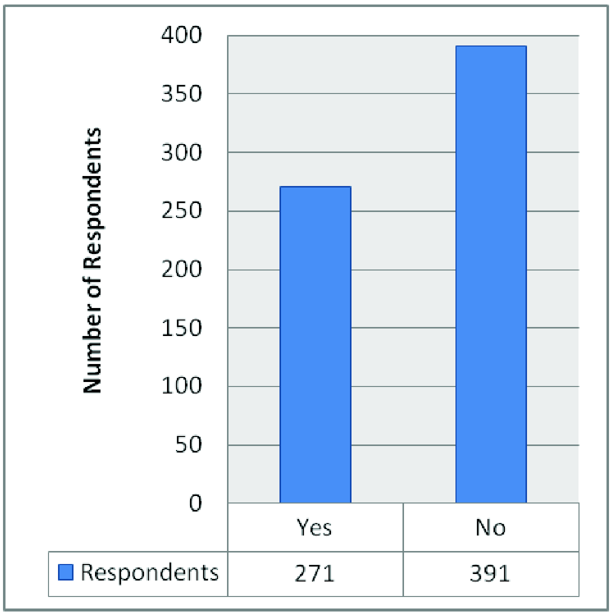
Alcohol Promotion and Children

In Scotland, there are licensing restrictions on children (under 16 years of age) entering some premises. There are also restrictions on where children can go within these premises.

All panellists were asked whether they believed that similar restrictions should apply within off-sales establishments (e.g. supermarkets, local shops). Their responses are provided below in Figure 29 (see page 95). A majority of respondents (391; 59.1%) stated that similar restrictions should not apply, whilst a minority of respondents (271; 40.9%) believed that similar restrictions should apply to off-sales outlets.

There was once again virtually no difference between male and female respondents' support for restrictions of this nature. However, the proportion of respondents stating that similar restrictions should apply was noticeably higher in South (45.1%) than in Central (38.8%) or North (38.3%). Again, there was a correlation between support for restrictions and age-group. This time, support for restrictions rose in line with age, from a low of 22.2% of those aged 16-34 to 33.0% of those aged 35-54, 48.2% of those aged 55-64 and 54.4% of those aged 65+.

Figure 29: Do you think similar restrictions should apply within off-sales establishments, for example supermarkets, local shops and other outlets (which are not pubs, bars, restaurants or clubs)?



Base = 662 respondents

The final question in this section asked all respondents for any suggestions they might have on how to minimise exposure to alcohol for children within off-sales outlets. Their responses were categorised thematically and are laid out below in Table 94 (see page 97).

The first thing to state in respect of this question is that it appears as though many panellists have chosen to answer a slightly different question than the one posed: rather than thinking about how to minimise exposure, many have instead offered opinions on how to reduce the number of youngsters buying and/or consuming alcohol. Where these responses have some relevance, they are included as tangential to the question (e.g. the most popular response – see below). However, 57 respondents (8.4%) provided responses which were completely beyond the limits of relevance of what the question was actually asking, and have therefore not been categorised and included.

The table shows that the most popular response (39 respondents; 5.7%) was that better parenting would help to minimise children's exposure. Although this may not be a direct means of minimising exposure in off-sales outlets, it was felt that better parenting could reduce the likelihood of exposure to alcohol leading to problems further down the line. Similarly, the next most popular response (37 respondents; 5.4%) was that alcohol awareness campaigns and/or education would help to offset the negative results of exposure. 33 respondents (4.8%) stated that restricting the advertising of alcohol would have similarly positive effects, whilst the same number (33 respondents; 4.8%) believed that restricting access to or visibility of alcohol in off-sales outlets would help to minimise exposure for children. 17 respondents (2.5%) provided a response which suggested that trying to insulate children from the existence and availability of alcohol was likely to have detrimental effects (the ‘forbidden fruit’ effect), whilst 16 respondents (2.3%) stated that they did not believe that exposure was a problem, or that exposure to alcohol was already sufficiently minimised.

12 respondents (1.8%) argued for more stringent age-checks or restricting the age at which people are able to buy off-sales alcohol, whilst a similar number (11 respondents; 1.6%) argued in favour of banning off-sales outright. 10 respondents (1.5%) believed that being more vigilant and more strict with licensees who break the law would prevent the likelihood of children being exposed to (or being able to buy) off-sales alcohol, whilst 8 respondents (1.2%) stated that trying to minimise exposure would either make no difference or would not be feasible in reality. Curtailed licencing hours were proposed by 6 respondents (0.9%), whilst better off-sales staff training was suggested by 3 respondents (0.4%). 1 respondent apiece (0.1%) suggested that banning ‘alcopops’ and discouraging off-sales by reducing pub prices would have positive benefits.

Table 94: Is there anything else you think that would minimise exposure to alcohol for children (under 16 years of age) within off-sales outlets?

Response	Respondents	
	Count	%
Better parenting	39	5.7
Anti-alcohol education / campaigns	37	5.4
Restrict advertising of alcohol	33	4.8
Restrict access / visibility in shops / supermarkets	33	4.8
Discuss it openly - not as 'forbidden fruit'	17	2.5
Don't see it as a problem / exposure already sufficiently restricted	16	2.3
More age checks / restrictions in off-licences	12	1.8
Ban / restrict alcohol off-sales	11	1.6
Stricter rules for / checks on licensees	10	1.5
Not possible / won't make any difference	8	1.2
Stricter licencing times	6	0.9
Better off-sales staff training	3	0.4
Discourage home drinking by reducing pub prices	1	0.1
Ban 'alcopops'	1	0.1
N/a	57	8.4

Base = 681 respondents

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