Trends and drivers of young people's drinking habits and beverage preferences: results from a study by the HAPI Consortium

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This report, commissioned by the European Commission, aims to provide a European Union wide overview of the market and regulation regarding types of alcoholic beverages with potentially particular appeal to minors.

If there are alcoholic beverages that particularly appeal to minors and contribute disproportionally to alcohol-related harm, this is important to know.

The report has been prepared with the intention of being of some use to those at the country or European levels who have responsibility to advise on alcohol policy.
In this report we include:

- ready-to-drinks (RTD), beverages that are in part a spirit, wine or malt and a non-alcoholic drink, served in a premixed format ready for consumption, and colloquially referred to as alcopops;

- high-strength premixes (HS) that are premixed beverages with a percentage of alcohol content of 15% or above, combined with juice or any other soft drink;

- ciders and perries, made from apples and pears respectively; and

- beer as a comparator, since 40% of all the alcohol consumed by 15-16 year olds on their last drinking day came from beer.
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Sales and spending grew between 1997 and 2003, then dipped to stabilize at sales of about €15 per head of population of legal drinking age, and 2% of total alcohol sales.

Source: Euromonitor (2012)
Spending (€) on RTD/HS drinks per population of legal drinking age in selected EU countries

Not only substantial variation in levels, but also in trends between countries. What could be drivers?

Source: Euromonitor (2012)
Relationship between the relative price of RTD/HS drinks and amount of pure alcohol from RTD/HS per adult population across EU countries (2010)

The price of RTD/HS appears to be an important driver of the variation in per capita spending on RTD/HS across countries at one point in time.

Source: Euromonitor (2012)
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1) We found no evidence that alcopops are disproportionately associated with binge drinking or problematic drinking.

2) We found no meaningful evidence within the drinking patterns of 15-16 year olds that alcopops had any distinguishing features different from alcoholic beverages in general.

3) Young people try alcopops relatively “late”, cider commonly being the first beverage to be tried and spirits the last.
Key findings of 15-16 year olds drinking from analysis of ESPAD data, 2007

4) Belonging to a relatively richer household tends to increase alcohol consumption, more so for alcopops and spirits than for beer and wine.

5) The biggest determinant of alcohol consumption (including alcopops) is the influence of friends who also drink.

6) The higher the minimum legal drinking age, the later the age when alcohol is first consumed, more so for wine and alcopops than for beer and spirits.
1. Germany
2. Netherlands
3. Italy
Spending on RTD/HS drinks per population of legal drinking age, EU average and Germany
Percentages of Dutch teenagers who consume pre-mixes on a weekly basis
Mean number of standard glasses of alcoholic beverages (10g per glass) drunk by young **Italian** women people on a typical drinking occasion.
1. Vodka based pre-mix, one of first on market
2. Flavoured beers, mostly sold in Germany
3. Popular beer
The case studies demonstrate that:

- The marketing strategies, including price, promotion and packaging are similar across all three products and are highly sophisticated, glamorous and appealing.

- Social media and web-sites dominate marketing strategies, and these are often difficult to regulate and monitor.

- Even when a particular communication strategy is ruled by self-regulatory codes as inappropriate, this is irrelevant as the marketing strategy lives on through advertisements being widely and easily available on media outlets, such as YouTube.
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If we want to better track drinking by minors and youth across the whole range of alcoholic beverages and throughout the whole European Union, we need easier ways to do this:

1. Commercial data, in particular with age segmentations, including minors, needs to be more easily accessible to researchers and policy monitors.

2. Survey data, such as ESPAD, needs to be undertaken much more regularly, and needs to be made much more accessible to researchers and policy monitors.

3. We are publishing a report in 2012 – and, we can only report on data for minors across the European Union that was collected five years ago, 2007.
Our overarching assessment is:

Alcoholic products do appeal to minors, and their marketing is appealing to minors -

But, how the products are prepared, packaged and marketed, and their potential impact on minors does not depend to any significant degree on whether the products are a ready-to-drink, a high strength premix, a beer, a wine, a sprit or a cider.
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