

EUROPEAN DRINKING TRENDS



The way we drink now

Helena Conibear, of Alcohol in Moderation, examines the most recent research on people's drinking habits across Europe today. Notable trends include a rise in teetotallers especially among women and an increase in heavy episodic drinking among French teenagers

DESPITE SENSATIONALIST reporting of rising drinking trends across Europe, the real figures show that alcohol consumption in the UK and the continent is moderate. In fact, according to the Eurobarometer 2010 report, 69% of drinkers say they usually have two drinks or less on a day when they drink.

Further, it is estimated that alcohol accounts for 4% of household expenditure (Eurostat July 2010), and approximately half of alcohol consumers (49%) say they drink between one and three times a week.

Looking at trends according to individual countries, the highest proportions of consumers are in Denmark (93%), Sweden (90%) and the Netherlands (88%), while, surprisingly, the lowest number of people drinking alcohol are found in Portugal (58%), Italy (60%) and Hungary (64%) – and this trend is unchanged since 2006.

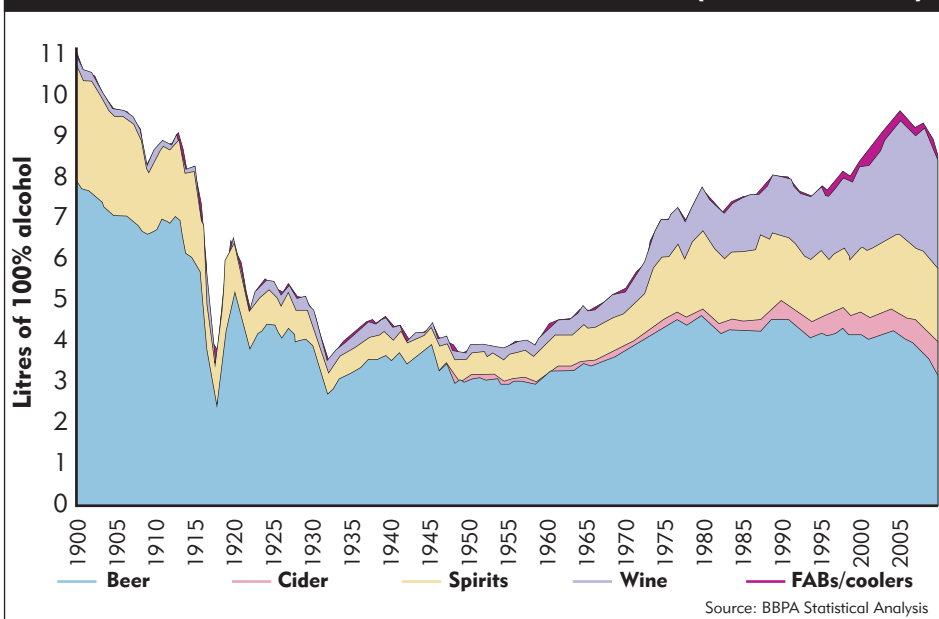
Interestingly too, both Portugal (43%) and Italy (25%) have the highest proportion of consumers who drink daily, showing a sharp contrast in lifestyles between older daily drinkers and young women. For example, 35% of women in Italy are choosing not to drink at all (or 53% according to the GFK Roper report, see below).

Rising levels of teetotallers

What may surprise some is that 32% of women across Europe are teetotal, compared to 16% of men. This varies by country, from just 7% of non-drinkers in Denmark to 39% in Portugal. Among 16 and 17 year olds polled in 35 countries every four years by ESPAD, 14% are non-drinkers. This replicates findings by a GFK poll of 17,000 consumers in 17 countries which found that almost one-third of respondents in Western Europe said they never drink alcohol. In Italy, 53% women surveyed said they are teetotallers, and 72% of Portuguese women.

In Central Europe, 48% of women and 24% of men said they never drink, whereas only 16% of Swedish women and 20% of Dutch women said they never touch alcohol. This compares with 32% of men and 45% of women being abstainers in the US, for example.

UK ALCOHOL CONSUMPTION: LITRES PER CAPITA (100% ALCOHOL)



Source: BBPA Statistical Analysis

UK ALCOHOL CONSUMPTION: LITRES PER CAPITA (100% ALCOHOL)

	Beer	Cider	Spirits	Wine	FABs	Total
1900	7.9	0.0	2.9	0.2	0.0	11.0
1910	6.6	0.0	1.8	0.2	0.0	8.6
1920	5.3	0.0	1.1	0.2	0.0	6.6
1930	3.8	0.0	0.7	0.2	0.0	4.7
1940	3.5	0.0	0.5	0.3	0.0	4.3
1950	3.1	0.1	0.6	0.2	0.0	3.9
1960	3.2	0.1	0.7	0.3	0.0	4.4
1970	3.8	0.1	0.9	0.5	0.0	5.4
1980	4.4	0.2	1.8	1.1	0.0	7.4
1990	4.5	0.3	1.7	1.4	0.0	7.9
2000	4.0	0.5	1.6	2.1	0.2	8.4
2004	4.2	0.5	1.9	2.7	0.2	9.5
2005	4.0	0.5	1.9	2.8	0.2	9.4
2006	3.9	0.6	1.7	2.7	0.1	9.0
2007	3.7	0.7	1.8	2.9	0.1	9.2
2008	3.5	0.7	1.8	2.8	0.1	8.9
2009	3.1	0.8	1.8	2.6	0.1	8.3

Source: BBPA Statistical Analysis

DESPITE SENSATIONALIST REPORTING OF RISING DRINKING TRENDS, THE REAL FIGURES SHOW THAT CONSUMPTION IN EUROPE IS MODERATE

Reasons for this trend in women choosing not to drink are complex, but do include health and weight. A poll by Yougov SixthSense found that although 95% of UK respondents believe that a drink “from time to time” does not hurt, 33% of those surveyed had cut down on their alcohol consumption in the past year with a further 10% having given up alcohol completely.

Younger drinkers reject ‘little and often’

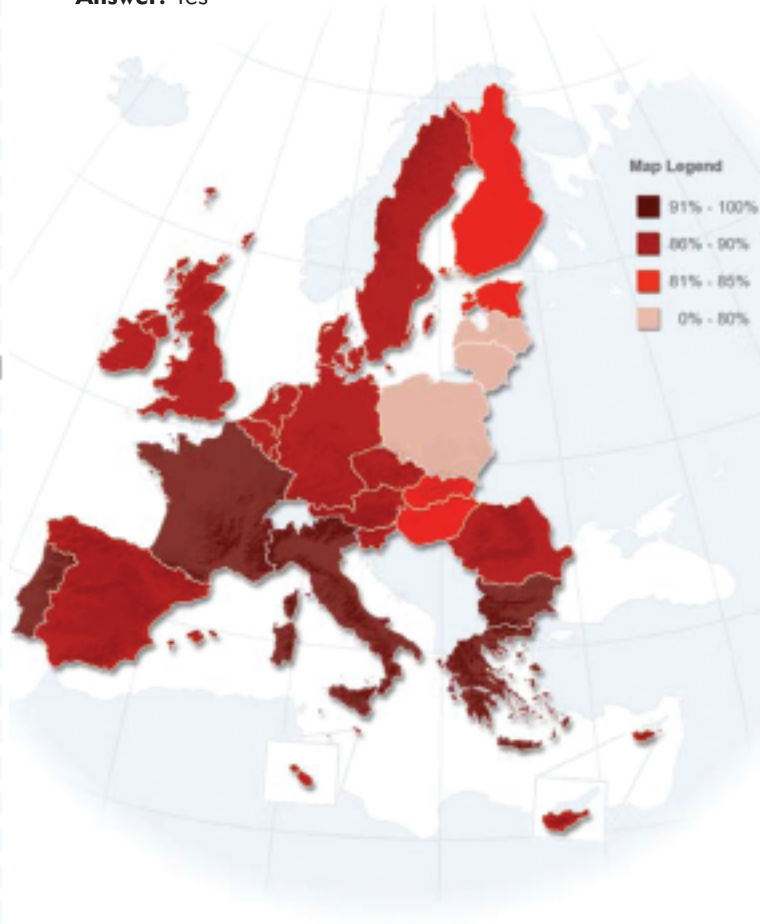
Fourteen per cent of adults across Europe drink daily, and those aged 55 or more are ▶

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EU CITIZENS: ATTITUDES TOWARDS ALCOHOL

IT	94%
PT	91%
EL	91%
FR	91%
BG	91%
IE	90%
ES	90%
DK	90%
NL	90%
AT	89%
SI	89%
SE	88%
EU27	88%
CY	88%
BE	88%
LU	88%
CZ	87%
UK	87%
RO	87%
DE	87%
MT	86%
FI	84%
SK	84%
HU	81%
EE	81%
PL	79%
LT	77%
LV	74%

Question: Did you drink any alcoholic beverage (beer, wine, spirits, cider or other alcoholic beverages) in the last 30 days?
Answer: Yes



Those who claimed to have drunk alcohol in the past 12 months – Base = 20,294 respondents

Source: Eurobarometer

more likely (25%) to drink daily than young people aged 15-24 years (3%), according to Eurobarometer. In France, for example, just 5.5% of people (aged between 15 and 44) now drink daily – against 23% of those aged 65 and over, whereas 61% of 15-19 year olds drink weekly, and 43% of 15 and 16 year olds drink excessively, each month. This seems, sadly, to reflect a trend away from enjoying a daily glass with meals to drinking more on fewer occasions, such as when going out at weekends.

Italy, as well as having a high proportion of abstainers, is also among the countries with the largest group of frequent drinkers, with 16% drinking every day. The Netherlands led this category, with 17%

IN SPAIN, WINE CONSUMPTION HAS STABILISED AT APPROXIMATELY 30 LITRES SINCE 2000, AT HALF THE LEVEL OF CONSUMPTION IN 1980 WHEN IT WAS 65 LITRES A HEAD

drinking daily, whereas in Russia, Poland and Sweden, just 1% imbibe every day.

All change in France, Italy and Spain

It's hard to emphasise just how much the culture has changed in these countries since 1980. The latest statistics from IREB for France suggest that total consumption per capita of consumers aged 15 and over is now 12.9 litres of pure alcohol a year, down from 14 in 2000, 15.4 in 1990 and 20 in 1980. Consumption of wine has dropped from 20.6 litres a head to 7.5 litres over the whole period, spirits consumption has remained largely static at between 2.3 and 2.7 litres and beer at 35 litres per capita. Beverage choice varies with age too, with 68% of those over 50 preferring wine, while only 24% of those aged 14 to 29 gave that response; most French young people (29%) chose beer as their favourite drink, while liqueurs and Port continue to be popular among women in the 50+ age group.

In Italy, alcohol consumption has halved from 14 litres a head in 1980 to seven (litres per head of pure alcohol) in 2007. The decline has been led by wine, falling from 93 litres per capita in 1980 to 45 litres in 2007. In Italy 88% of respondents over 50 years old drink wine, but among Italians aged 14 to 29, only 29% prefer wine, while 43% say beer is their favourite drink. Total beer consumption in Italy has grown to 31 litres per head, from just 16 litres in 1980.

This trend is seen in Portugal too, where beer consumption has grown to 80.6 litres per head in 2007 from 38 litres in 1980.

In Spain, wine consumption has stabilised at approximately 30 litres since 2000, at half the level of consumption in 1980 when it was 65 litres a head. Beer consumption has increased from 53 litres a head in 1980 to 82 litres in 2007. Total consumption is stable at 10 litres of pure alcohol per capita. There is a below-EU-average prevalence of excessive drinking in Spain with 29% of 16 and 17 year olds drinking more than five drinks on one occasion, usually at weekend street parties, or "botellóns".

The irony of many traditional wine-producing countries moving towards beer is echoed in many traditional beer-

producing countries such as the UK and Denmark continuing to move towards wine. The Czech republic (158.8 litres per head), Germany (111.7), Ireland (106) and Austria (108) are the biggest consumers of beer worldwide per capita, with consumption figures stable since 2004.

Wine consumption continues to grow in Sweden (19 litres) and Denmark (32.7). In Norway over 10 years the proportion of wine in total alcohol consumption, (expressed in litres of pure alcohol) has increased from 28.6% to 34%.

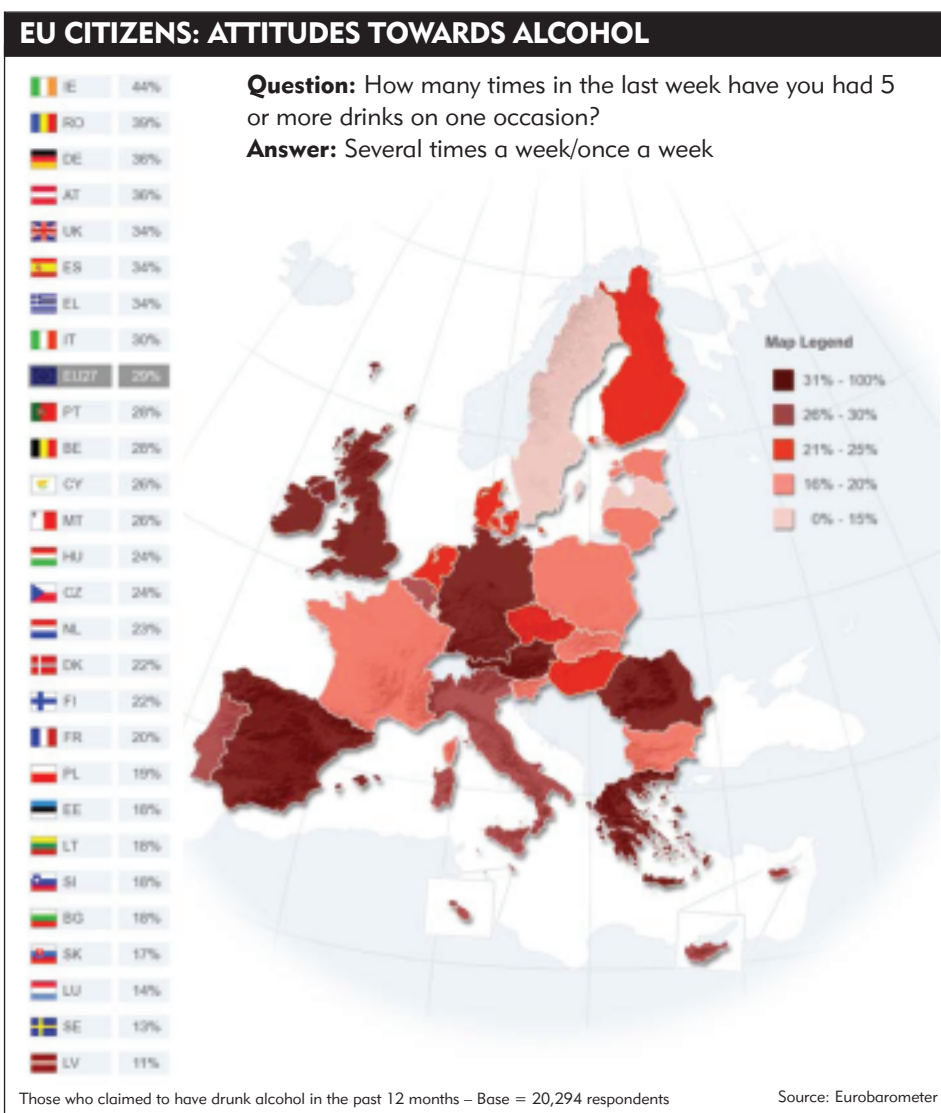
Poland has halved consumption of spirits from six litres in 1980 to three litres in 2007, whereas in Russia recorded consumption is still at six litres. Spirits accounted for 57% of total sales in terms of pure alcohol in 2009, while beer accounted for 30%, still and sparkling wine for the remainder.

Declining consumption in UK and Ireland

After a decade of growth, especially in wine, per capita alcohol consumption in the UK has fallen from a high of 9.5 litres in 2004 to 8.3 litres in 2009. The average consumption for a UK female is a modest nine units and 17 units for men.

The UK has seen a steady increase in wine consumption over the past decade, whereas beer consumption continues to fall (currently at 87.7 litres per capita against 101 litres in 2003). Figures released by TDA (Trade and Data Analysis) show a 17.42% rise in wine consumption between 2001 and 2005 with wine consumption now at 27.9 litres per capita according to the WSTA. A report released by Mintel in June 2009, however, showed wine sales fell by 2% in the UK for the first time in over a decade and only the second time in 20 years (although growth returned in 2010, see pages 18-22).

With the recession biting hard in Ireland, consumption in 2009 is 21% below the peak 2001 level of 11.3 litres. After a decline of 7.7% in 2008, average alcohol consumption in 2009 at nine litres is back at the 1995/96 level of 9.2 litres per capita. In one year, consumption has fallen from 10 litres of pure alcohol in 2008 to nine litres in 2009. The decrease was led by



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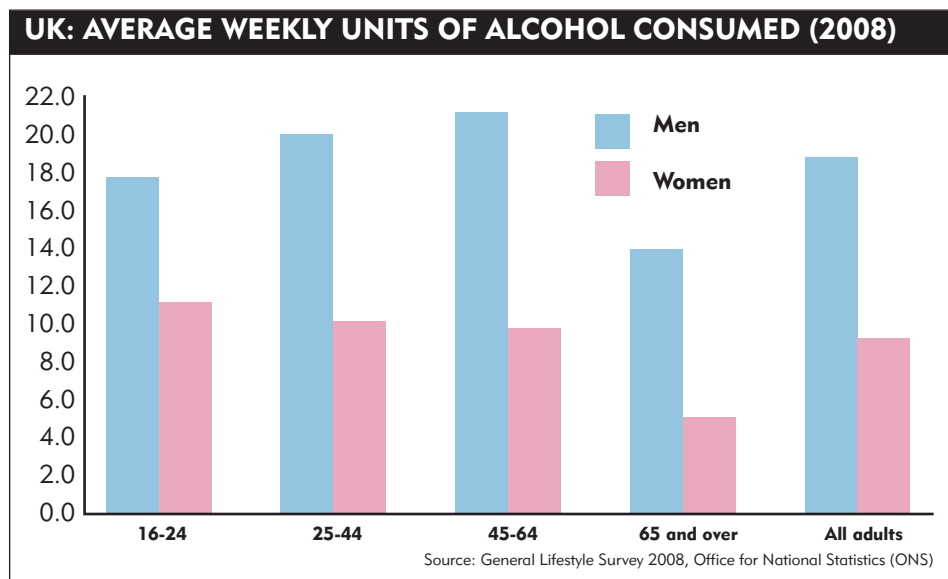
spirits at -19% against -6.5% for beer and -7% for wine. The individual product market volume shares in Ireland in 2009 were wine at 23.3%, beer at 50.7%, spirits at 17.5% and cider at 8.5%.

European trends for 16 and 17 year olds

The ESPAD survey in 35 countries every four years gives a useful barometer of trends and finds the most popular drink is beer (49%), followed by spirits (40%). Wine and alcopops contribute 13% and 11%, and cider makes up only 6%. For girls, spirits are most popular in 17 of the 31 countries.

Spirits are the least important in Romania, Belgium (Flanders) and Russia, accounting for 13% of total consumption ▶

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This is a sign that Russian youth are rejecting their parents spirits preference (accounting for 57% alcohol sales). The contribution of alcopops to total consumption in Poland, the Slovak Republic, Romania, Bulgaria, Lithuania and Croatia is just 3%, but they are popular in Switzerland and Denmark (25%). In the Netherlands, RTDs account for 31% of total consumption and the highest proportion per gender is found among Dutch girls (40%).

Sixty-one per cent of students drink monthly, a statistic that hasn't changed from 1995 to 2007. However, between the last two surveys there was a clear decrease in the average proportion of students that had drunk beer and/or wine during the past 30 days. This varies from 80% of the students in Austria and Denmark, to only 31% in Iceland and 35% in Armenia.

The total amount of alcohol consumed on the last recorded day is usually low in countries where the students drink often; for example, in Greece, and the other way around for countries with low consumption frequencies – ie large quantities on fewer occasions. Countries with such a pattern include the Nordic countries Finland, Iceland, Norway and Sweden.

Drinking to excess

On average, 18% of 16 and 17 year olds reported that they had been intoxicated

DENMARK IS THE MOST EXPENSIVE COUNTRY IN THE EU FOR FOOD AND ALCOHOL (AFTER FINLAND), YET CONSISTENTLY TOPS THE RANKS FOR THE MOST DRUNKENNESS AND HEAVIEST CONSUMPTION OF ALCOHOL IN THE EU

during the month (10% weekly). Among Danish students, 50% reported intoxication during that period; and levels were also high (30% or above) in the Isle of Man, the UK, and Austria. Countries with increases in heavy episodic drinking among 15 to 16 year olds include Poland (which returned close to the 1999 level after a drop in 2003 and with an increase of 16%), France (15% increase), Croatia (14%) and Bulgaria (12%).

Eurobarometer found that half (46%) of the youngest age group (15-24) say they never binge drink or do so less often than

once a month, 10% claim to usually have five drinks or more on certain occasions. However, although regular drinking among young people (more than 10 drinking days in the last month) is declining, those getting drunk more than three times a year is increasing, again suggesting that patterns of drinking are changing to occasional heavy drinking occasions (18% of women and 33% of men) rather than regular more moderate use. The most striking example is Norway in which 42% of the girls and 35% of the boys reported heavy episodic drinking during the past 30 days.

The GFK survey showed too, that while young people in most European countries are drinking less frequently than their parents and grandparents, they are consuming more alcohol each time they drink. One interpretation of this is that countries where alcohol drinking is more likely to have occurred recently are those where students normally drink smaller amounts per drinking day. A typical example of such a country would be Greece, where 71% of the students had used alcohol in the past 30 days (ESPAD average 61%) and the volume consumed on the latest drinking day is 3.1cl (ESPAD average 4.2cl). Students in Bulgaria, Greece, Portugal, Russia and Ukraine consume (around 3cl) per drinking occasion.

ESPAD showed a significant downward trend over the last three years for the UK in the use of any alcohol during the last 12 months, the use of alcohol in the last 30 days and that people are drinking less beer and wine. Fifty-seven per cent had been drunk once in 12 months and 14% of 15-16 year olds reported getting drunk at least 20 times in the previous year, a percentage that is far lower than public or media perceptions of teenage drinking. However, 10% of 15-16 year olds had been drunk at least six times in the last month, a very worrying level of frequency of intoxication. Also, the amount drunk on the last occasion recorded remains at 6cl, about three pints for boys or three double spirit measures for girls – well above sensible drinking guidelines (equivalent of 2-3cl for women and 3-4cl for adult men).

Statistics in 2010 reflect similar figures for 11-15 year olds in the UK, showing that 18% of school pupils aged 11-15 reported drinking alcohol in the week (against 26% of pupils in 2001) and 48% of pupils said they had never had a proper alcoholic drink, compared to 39% in 2003. Pupils in England aged 11-15 are becoming less tolerant of drinking and drunkenness among their peers. For example, in 2008, 36% agreed that "it was OK for someone of their age to drink alcohol once a week", compared with 46% in 2003.

Among adults

According to Eurobarometer, among adults there has been a slight increase – from 15% in 2006 to 17% in 2009 – in the percentage saying they drink five or more drinks in one sitting once a week across Europe. On the other hand, there has also been a rise in those reporting they never binge drink from 31% in 2006 to 34% in 2009. The prevalence of frequent excessive drinking is highest in Ireland (44%), Romania (39%), Germany and Austria (both 36%). The UK, Spain and Greece report 34%. Drinking more than five drinks is not confined to any particular region within the EU. Men (36%) are more likely to drink excessively once a week or more often than women (19%).

Statistics on Alcohol: England 2010 found that 22% of men reported drinking over eight units and 15% of women reported drinking over six units on at least one day in the week prior to interview.

What, if any, conclusions can be drawn?

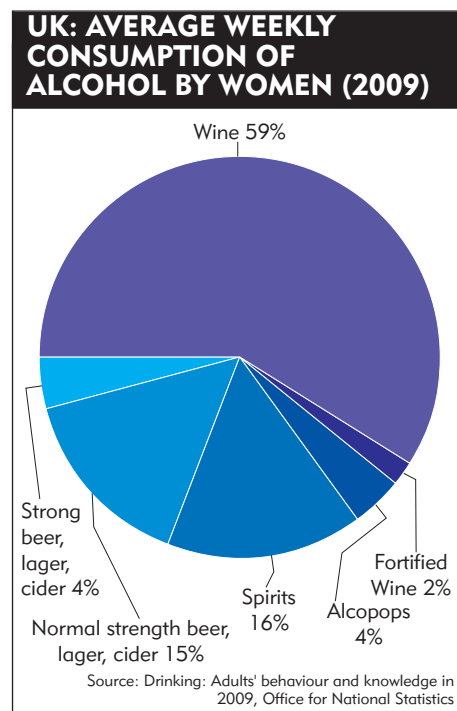
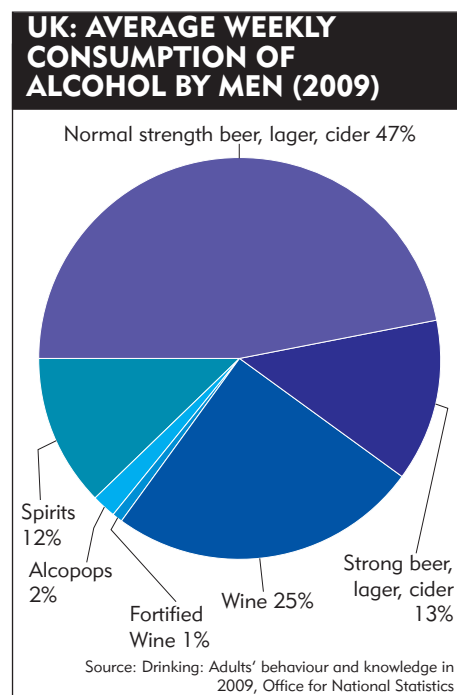
The breakdown of the figures suggest that there is no such thing as "European consumption" as patterns of drinking and beverage choice vary considerably within each of the EU 35. Europe can, in some ways, quite effectively be broken down into Northern Europe/Mediterranean and Eastern Europe with a common theme of youth rejecting the former generations' beverage choice, or whether to drink at all. Yet the alcohol policies of each of these countries vary tremendously, which should, one would think, have an effect on consumers' relationships with alcohol. It is very interesting to compare Italy, Portugal

and France, for example, where with the latter the *Loi Evin* (alcohol policy law) has limited the advertising and promotion of alcohol for nearly 20 years, and yet all three see a rise in non-drinking among women and France has one of the sharpest rises in binge drinking among the young. When comparing the Nordic countries and the UK and Ireland, Denmark is the most expensive country in the EU for food and alcohol (after Finland), yet consistently tops the ranks for the most drunkenness and heaviest consumption of alcohol in the EU. Finally, recession has certainly affected spending on alcohol in countries such as Ireland, but the latest report (5 July) by Eurostat revealed that the volume of retail trade of food, alcohol and tobacco (across 27 EU member countries) was up by 0.4% in May 2010 against May 2009, so no assumptions can be made. ab

- Helena Conibear is executive director of AIM (Alcohol in Moderation)

Sources

- The full report is available from <http://www.espad.org>
- 2009 Eurobarometer report. Respondents from each of the 27 member states of the European Union were polled between 2-19 of October 2009 (26,000 interviewed in total, aiming to represent the European population above the age of 15). The full report is available from <http://ec.europa.eu>
- GfK survey. The *Wall Street Journal* commissioned market research firm GfK to poll 17,000 inhabitants in 13 European Union countries, plus the US, Russia, Turkey and Switzerland on their drinking habits. For further information, visit <http://www.gfk.com>
- YouGov. The survey was carried out online. Total sample size was 2,387 UK adults aged 16+. Fieldwork took place between 2-4 March, 2010.
- Statistics on alcohol England 2010. The report is available from [http://www.ic.nhs.uk/statistics-and-data-](http://www.ic.nhs.uk/statistics-and-data-collections/health-and-lifestyles/alcohol/statistics-on-alcohol-england-2010)



[collections/health-and-lifestyles/alcohol/statistics-on-alcohol-england-2010](http://www.ic.nhs.uk/statistics-and-data-collections/health-and-lifestyles/alcohol/statistics-on-alcohol-england-2010)