

Risky business:

The alcohol industry's dependence on
Australia's heaviest drinkers

fare
Foundation for Alcohol
Research & Education



ALCOHOL TRUTH
— **fare** —



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Introduction

Alcohol harms in Australia are extensive and well acknowledged: resulting in 5,500 deaths every year and a further 157,000 hospitalisations.

Faced with the evidence of those harms, the alcohol industry's oft-cited defence is to reference official per capita consumption data which shows national alcohol consumption in decline, in an effort to argue that Australia has become a nation of responsible drinkers.

Risky business, a new video produced by the Foundation for Alcohol Research and Education (FARE) dismantles that flawed logic, revealing that the decline in the amount of alcohol being consumed as a nation in fact masks alarming patterns of consumption in significant segments of the population.

More than 3.8 million Australians average at least four standard drinks of alcohol per day, that's twice the recommended health guidelines.

The findings contained in the *Risky business* video are drawn from an analysis of the study *Understanding recent trends in Australian alcohol consumption* by the Centre for Alcohol Policy Research (CAPR).

Over 1.9 million Australians drink on average more than six standard drinks per day, three times the amount outlined in the Australian Guidelines to Reduce Health risks from Drinking Alcohol. Just under a million Australians consume on average more than eight standard drinks a day, equivalent to more than four times the recommended health guidelines.

The video also exposes the alcohol industry's 'dirty little secret', that is, its economic dependence on risky drinkers.

The 3.8 million Australians averaging more than four standard drinks of alcohol per day represent just 20 per cent of all Australians aged 14 and over, yet this group accounts for a staggering 74.2 per cent of all the alcohol consumed nationally each year.

No surprise then that these almost 4 million Australians represent the lifeblood of the Australian alcohol industry. They are the industry's best customers, targeted and branded by industry as 'super consumers'. But while the alcohol industry sees 'super consumers', health professionals see risky drinkers.

The alcohol industry's reliance on risky drinking is brought into sharp relief when examining the economic impact of measures to encourage 'super consumers' to drink within the guidelines. The total alcohol consumed as a nation would be reduced by 39 per cent, or 38 million litres of pure alcohol.

This knowledge explains the alcohol industry's steadfast refusal to support alcohol policy measures that would effectively encourage and support Australians to drink within the recommended guidelines. But it does not excuse the industry's consistent and continuing efforts to block and undermine measures that would save lives and reduce alcohol-related injury and disease.

This paper expands on the 'super consumer' story, providing greater detail on the alcohol consumption data underpinning the *Risky business* video, an overview of the Australian alcohol industry, and an analysis of the impact on the industry if 'super consumers', those Australians drinking at extremely harmful levels, were given the necessary support and encouragement to drink within the guidelines instead.

Background

Alcohol and its consumption is entrenched in Australian culture, beginning with colonisation and continuing until today. Much of how and why we consume alcohol is influenced and shaped by the alcohol industry and its agents. Over the last two centuries the alcohol industry has increased their range of products, increased the amount of alcohol being produced, increased their retailing efforts and increased and diversified their marketing strategies.¹ It has also consolidated its ownership and become a largely foreign owned industry, in terms of production and manufacturing.

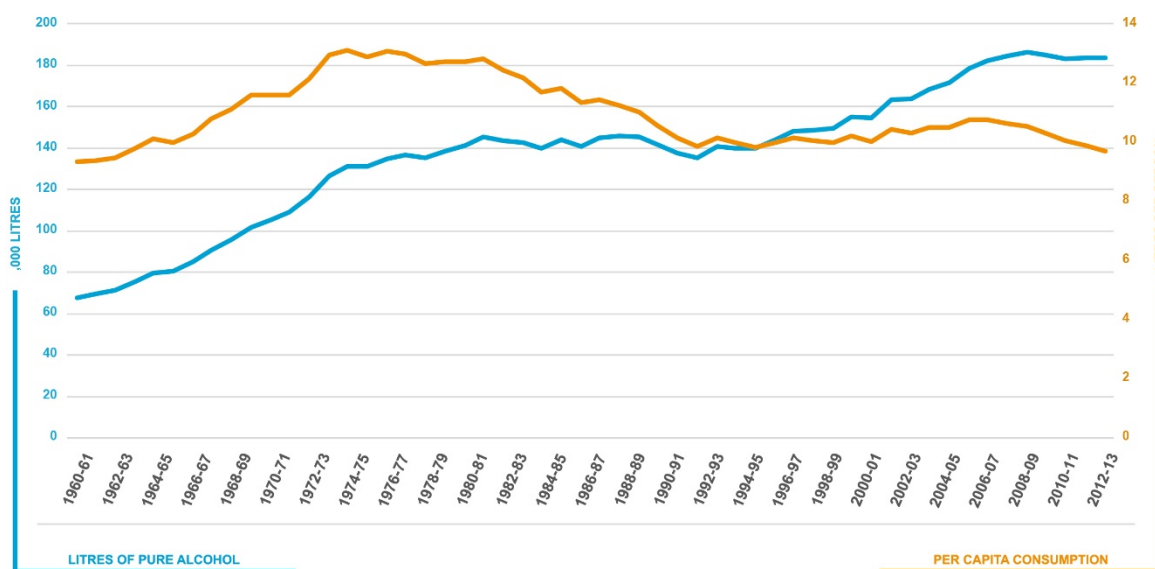
The alcohol industry also promotes alcohol as a normal, everyday product through the sponsorship of individuals, teams and events. This includes linking alcohol brands and products to sporting events and personalities, to cultural events and festivals, incorporating alcohol as a key part of national celebrations such as ANZAC Day and Australia Day, and promoting the idea that alcohol should be consumed every day as a reward, as relaxation and for no reason in particular.^{2,3}

However, the consumption of alcohol can cause harm, both to the drinker and to others. These harms include both injury and disease.

Nevertheless, alcohol is a legal commodity, available in a market economy with buyers and sellers, comprised of production, wholesale and retail of beer, wine, spirits and cider. While it is legal to produce and sell alcohol, alcohol is not like other commodities like orange juice or cornflakes. It is a product that has substantial detrimental health and social consequences for Australians and therefore requires special laws and restrictions. These restrictions should reflect the harm that alcohol can cause and are in the public interest and for the public's benefit.⁴

The latest figures from the Australian Bureau of Statistics (2014) outline that 183.7 million litres of pure alcohol are available for consumption from alcoholic beverages in Australia.⁵ Figure 1 highlights the amount of pure alcohol that is available for consumption in Australia compared to the current per capita consumption rate since 1960. Although consumption per capita has stabilised in the last 25 years, the total amount of alcohol sold within Australia has increased in the last five decades in line with the increase in population.

Figure 1. Litres of pure alcohol and apparent per capita consumption, Australian Bureau of Statistics, 1960-2014.⁶



Note: Litre of pure alcohol is measured on the left axis; per capita consumption is measured on the right axis.

Alcohol consumption is not static; it is influenced by alcohol’s availability (both economic and physical), social acceptability and the promotion of alcohol as a normal everyday product (known as normalisation of use).⁷

The purpose of this report is to show how the alcohol industry rely on Australia’s heaviest drinkers and what the impact to the alcohol industry would be if the level of consumption by these heaviest drinkers decreased.

The alcohol industry

The alcohol industry’s raison d’être is to sell their product in order to generate profit. Alcohol companies have a fiduciary responsibility to their shareholders to make a profit, and this legal responsibility requires them to ensure a profit is being made despite the harms that are associated with the product. The alcohol industry seeks to build, expand and maintain brand loyalty and sales, and aims to position itself as a good corporate citizen.⁸

The alcohol industry is a multibillion dollar industry. The Australian alcohol industry, is a mix of producers, retailers, wholesalers and related industries including advertising and marketing and containers and packaging. According to IBISWorld reports, the largest profit and revenue are generated from the on-licence sector of pubs, bars and nightclubs. The liquor retailing sector is the second largest sector.

While Table 1 overleaf is not a complete picture of all sectors within the alcohol industry, it provides a snapshot of the size, the amount of money that is generated, and profits made by each of the industry segments.

Table 1. Revenue and profit generated by industry segment, IBISWorld.

Sector	Industry segment	Revenue (\$b) ^	Profit (\$m) **
Production	Beer manufacturing ⁹	4.3	680.1
	Wine production ¹⁰	5.3	363.1
	Spirit manufacturing ¹¹	0.6	73.9
	Cider production ¹²	0.3	22
Retail*	Liquor retailing ¹³	9.9	1,000
	Pubs, bars and nightclubs ¹⁴	16.8	1,100
Wholesales#	Liquor wholesaling ¹⁵	5.1	92.1

* 'Liquor retailing' refers to operators in the industry that sell alcohol products in a packaged form which is intended for consumption away from premise, and includes both online and bricks-and-mortar retailers. 'Pubs, bars and nightclubs' refers to the operators in the industry that sell alcohol beverages for consumption on premise.

Liquor wholesalers buy beer, wine and spirits from manufacturers and sell these products to pubs, bars, supermarkets and other liquor retailers. This excludes the wholesale operations of alcohol product manufactures.

^ Revenue is the total amount of income generated by the sale of goods or services.

** Profit is the amount of income that remains after accounting for all expenses, debts, additional income streams and operating costs.

The sustainability of each of these sectors within the alcohol industry relies on the profits generated from the sale of their products. The following provides an overview of the profits generated by the different segments within the alcohol industry and the major companies within each.

Alcohol production

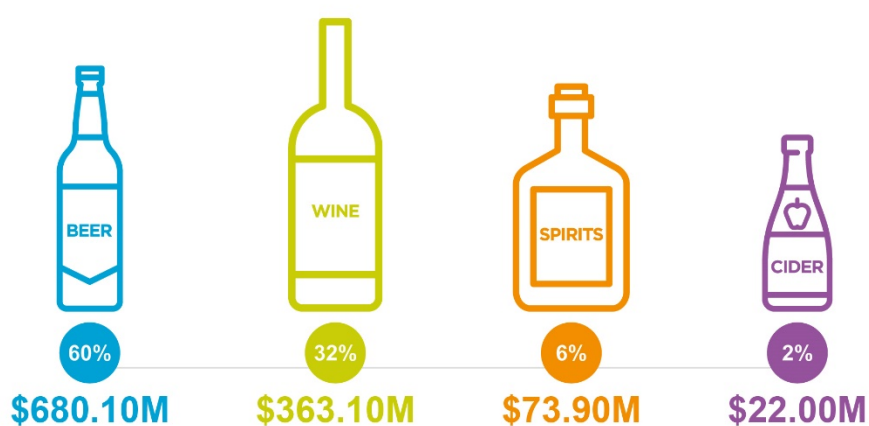
The alcohol production sector of the industry generates significant amount of profits. Beer is the most profitable sector of Australia's alcohol manufacturing industry, generating \$680.1 million in annual profits.¹⁶ Beer manufacturing is dominated by Lion Pty Ltd and SABMiller Beverages Investments Pty Limited. Lion Pty Ltd controls 43 per cent of the Australian market and includes brands such as XXXX and James Squire.¹⁷ SABMiller Beverages Investments is the second largest, which controls 40.7 per cent of the market and includes brands such as Victoria Bitter and Carlton Draught.¹⁸

The wine industry is the second most profitable sector generating \$363.1 million in profits annually.¹⁹ Unlike Australia's beer sector, there are more players in the market. The largest company is Treasury Wine Estates Limited, controlling 11.9 per cent of the wine market.²⁰ This company's brands include Yarra Ridge, Lindeman's Wines and Penfolds. This is followed by Pernod Richard Pacific Holding Pty Ltd with 10.1 per cent, whose brands include Jacob's Creek and Wyndham Estate. Accolade Wines Holdings Australia Pty Limited market closely follows at 9.7 per cent, with brands such as Hardy's and Echo Falls. The fourth largest company is Casella Wines Pty Limited, controlling 7.9 per cent of the market and including brands Yellow Tail and Casella 1919.

The spirits industry is the third most profitable sector within the Australian alcohol industry, generating \$73.9 million in profits annually. The largest company within this sector is Diageo Australia Limited, controlling 23.3 per cent of the market and including brands such as Smirnoff and Bundaberg Rum. Asahi Holdings (Australia) Pty Ltd is the second largest, with control of 16.1 per cent of the market and brands under this company including Vodka Cruiser.

The cider sector is the smallest sector of the alcohol industry, generating \$22 million in profits annually. Like the beer sector, the cider sector is dominated by two major players: SAB Miller Beverage Investments Pty Limited and Lion Pty Ltd. SAB Miller controls 39.2 per cent of the market and includes brands such as Bulmers and Strongbow. Lion Pty Ltd controls 26.3 per cent of the market and includes 5 Seeds and James Squire Orchard Crush.

Figure 2. Annual profits (AUD million) and proportion generated by production by each category of alcohol beverages.



Retail

Profits are also generated by liquor retailers (off-licence), and pubs, clubs and nightclub (on-licence). These sectors are sizable, with Australia's liquor retail sector generating \$9.9 billion and the pub and club sector generating \$16.8 billion in annual revenue.^{21,22}

The off-licence retail sector is dominated by Woolworths, which accounts for 43.3 per cent of the market. Liquor retailers operated by Woolworths include Dan Murphy's, BWS and Cellarmasters. Woolworths has had interests in liquor since 1960, when it first purchased a retail store in Leederville, Western Australia.²³ Since this time, Woolworths has continued to acquire liquor interests across Australia due to its profitability for the Woolworths portfolio. The second largest company in the retail sector is Wesfarmers Limited (the owner of Coles supermarkets) with 21.2 per cent of the market share. Wesfarmers' retailer brands include Liquorland and First Choice Liquor.

The on-licence sector (pubs, clubs and nightclubs) generates \$1.1 billion in profits a year. Woolworths again is the company with the largest Australian market share, at 8.9 per cent. Unlike the off-licence retail sector, there are many more companies in the on-licence sector, including segments such as casinos, social clubs and restaurants.

Wholesalers

Australia's alcohol wholesaling sector generates an annual profit of \$92.1 million. The role of the alcohol wholesaler is to purchase alcohol products from the producers and sell these products to pubs, bars, supermarkets and other alcohol retailers. Metcash Limited holds the majority of market share with 61.8 per cent of the Australian wholesale market. The second largest is the Independent Liquor Group with 6.7 per cent of the market share.

However, the two major supermarkets Woolworths and Coles also operate within this sector. Therefore, the total figures noted here for the Australian wholesale industry exclude the activities of Woolworths and Coles who act as their own wholesalers.

Advertising and marketing industry

Alcohol advertising and promotion foster alcohol consumption and sales through the positioning of alcohol's connection with positive associations in life.²⁴ The alcohol industry, like other industries, uses advertising and promotion to ensure that profits are generated from sale of their product. The alcohol industry has a symbiotic relationship with the advertising and marketing sector. Similar to the alcohol industry, the advertising industry generates substantial amounts of revenue. The Australian Association of National Advertisers (AANA) highlights that the advertising, marketing and media industries contribute in excess of \$30 billion annually to the national economy.²⁵ In 2011, the total advertising expenditure in Australian media (including online advertising) was \$12.3 billion.²⁶

The alcohol industry is increasingly globalised, with a few large multinational companies dominating the market. These companies have access to significant resources to assist in marketing their products.²⁷ Available figures show that the annual expenditure by the alcohol industry on marketing is substantial. Globalised alcohol manufacturers (such as Diageo, Pernod Ricard Pacific) are among the biggest spending advertisers in Australia. The Preventative Health Taskforce estimated that the industry spends at least \$120 million in measured forms of advertising, such as television, magazines, radio and billboards.²⁸ However, the expenditure on unmeasured forms of marketing is growing and has been estimated to be between two and four times this amount, with alcohol sponsorship alone amounting to approximately \$300 million per annum.

Viability of the alcohol industry

The viability of an industry is dependent on their ability to sell its product. It is not in the alcohol industry's interest to reduce the scale or consumption of its products.²⁹ While the alcohol industry are ensuring that profits are generated, it is also ensuring that it is operating in a political, economic and culture environment that is conducive to achieving its corporate goal.³⁰

An example of the alcohol industry fostering an environment that does not decrease its profits is the use of the vague term 'responsible drinking'. The alcohol industry has long argued that they promote moderate alcohol consumption by using terms like 'drink responsibly'. However, there is no scientific evidence to show that such 'drink responsibly' messages are an effective strategy for mitigating alcohol-related harm.³¹ In fact, research has shown that the use of the phrase 'responsible drinking' in alcohol campaigns serves to subtly advance industry sales.³²

The use of the term 'drink responsibly' is seen among many as a public relation tool to promote the industry's product.³³ While the alcohol industry are continually promoting the 'drink responsibly' message, the need for them to target a subset of drinkers has also been revealed.

The alcohol industry has self-defined a subset of Australian drinkers as ‘super consumers.’ At a recent international sales conference in New Zealand, hosted by the Liquor Marketing Group (LMG), delegates were specifically told that alcohol “retailers need to identify and target super consumers”³⁴ recognising that these drinkers are fundamental to generating profits for their business.

Following the conference, an article in the December 2014 issue of *Liquor News* outlined the key themes that retailers need to consider when targeting super consumers. This article demonstrates that the alcohol industry relies upon these heavy drinkers or super consumers, stating that “if they super consume in one category they do it in seven to nine more categories”.³⁵ The conference also identified that the way to target this subset of the population is for “...a strong network, an infrastructure, a marketing body”.³⁶

This admission by the alcohol industry that it must target ‘super consumers’ implies that these drinkers are their backbone. Relying on these ‘super consumers’ is more than ever important for the alcohol industry in the current environment in which overall alcohol consumption is declining nationally.

Alcohol consumption

The Australian Bureau of Statistics (ABS) *Apparent consumption data* (2015) shows that alcohol consumption per capita peaked in 1974-75 at 13.1 litres of pure alcohol per person aged 15 years. This remained stable for the next decade, before declining to 9.8 litres per person over the decade up to 1995-96. Since this time, alcohol consumption has risen to 10.8 litres in 2006-07 and 2007-08 before declining again to 9.7 litres of pure alcohol per person in 2013-14.³⁷

The National Drug Strategy Household Survey (NDSHS), published every three years by the Australian Institute of Health and Welfare (AIHW) also shows that Australia’s alcohol consumption as a nation has been fairly stable, with minor decreases over the last decade but with increasing rates of people abstaining from alcohol altogether.³⁸ The proportion of recent drinkers among Australians aged 14 and over, who have consumed at least a full serve of alcohol in the previous 12 months, has declined from 83.6 per cent in 2004 to 78.3 per cent in 2013.³⁹

The NDSHS survey relies on self-reports of alcohol consumption, unlike the ABS, which relies on the amount of alcohol that is available for consumption. Similar to other self-reported data, the amount of alcohol consumption captured by the NDSHS is much lower than the amount that is sold. This is likely due to low survey response rates as well as recall and other biases by respondents who tend to report less alcohol than they actually consume in surveys. Nevertheless, the NDSHS is the most robust alcohol collection survey tool in Australia and is the national survey that is used to determine the trends and patterns in drinking practices.

Both data collection methods, the ABS apparent consumption data and NDSHS survey, indicate an overall decline in alcohol consumption in recent years. However, even with this decline, a large proportion of Australians continue to drink at risky levels.

The alcohol industry often uses these recent alcohol consumption trends in media commentary and policy submissions to support their case that Australia is a nation of responsible drinkers. However, this only tells part of the story. For instance, the ABS per capita figure, 9.7 litres of pure alcohol per person, includes all Australians aged over 14 years of age, including those that abstain, and hides patterns of risky consumption.

Consumption patterns

To gain a greater understanding of drinking patterns, an analysis was undertaken using the NDSHS 2013 data to determine the average alcohol consumption for the top five per cent, top ten per cent, top 20 per cent and top 50 per cent of Australian drinkers.

Table 2 shows the mean annual volume of pure alcohol consumed (in litres), as well as the proportion of total alcohol consumed by each population quantile group in 2013. The quantiles are found by dividing the total population (of Australians aged 14 and over) into 20 groups, beginning with the five per cent of the population that consumes the least alcohol and ending with the five per cent that consumes the most alcohol. This data is based on earlier research reported in the 2015 *Understanding recent trends in Australian alcohol consumption report*.⁴⁰

Table 2. Mean annual volume of alcohol consumed (litres) and proportion of total alcohol consumed by consumption quantile group (NDSHS, 2013).

Quantile group (Australian population aged 14 and over)	Mean annual volume of pure alcohol consumed (litres) 2013	Proportion of total alcohol consumed (%) 2013	
1	0.00	0.00%	Abstainers
2	0.00	0.00%	
3	0.00	0.00%	
4	0.00	0.00%	
5	0.03	0.00%	Occasional drinkers
6	0.10	0.10%	
7	0.21	0.20%	
8	0.46	0.40%	
9	0.78	0.80%	Regular drinkers
10	1.35	1.30%	
11	1.88	1.80%	
12	2.41	2.30%	
13	3.19	3.10%	
14	4.07	3.90%	
15	5.39	5.20%	
16	6.89	6.60%	
17	8.91	8.60%	Heaviest drinkers: 'super consumers'
18	12.89	12.40%	
19	18.52	17.90%	
20	36.59	35.30%	

The above table reveals that the top 50 per cent of the population which equates to 9,514,383^a Australians (quantiles 11-20) are drinking 10.07 litres per person per year or 97.1 per cent of all the alcohol consumed in Australia.

The top 20 per cent of the population, quantiles 17-20, which equates to nearly four million (3,805,753) Australians, are drinking an average of 19.23 litres per person per year or 74.2 per cent of all the alcohol consumed in Australia.

Among this 20 per cent, the alcohol consumption patterns of Australia's heaviest drinkers are even more concerning.

The top ten per cent of the population which equates to 1,902,876 Australians (quantiles 19-20) are drinking 27.56 litres per person pa or 53.2 per cent of all the alcohol consumed in Australia.

The final five per cent of the Australian population, which equates to 951,438 Australians (quantile 20) are drinking 36.59 litres of pure alcohol pure person per year or 35.3 per cent of all the alcohol consumed in Australia. This means that the top five per cent of drinkers consume almost eight times more alcohol than the average for all Australians aged 14 years and older.

The analysis of data also shows that the first four quantiles of the population (that is 20 per cent of all Australians aged 14 years and older) consume no alcohol at all.

Further analysis was conducted to determine how many standard drinks of alcohol the top 20, ten and five per cent of drinkers were consuming. Table 3 shows the percentage of Australia's total national consumption, along with the amount of alcohol being consumed per person (both in litres and standard drinks of alcohol) for the top five, ten and 20 per cent of the population.

Table 3. Percentage, litres of pure alcohol per year and standard drinks per day of top 5, 10 and 20 per cent of the Australian population, NDSHS, 2013.

Australian population aged 14 and over	Percentage of consumption	Average litres of pure alcohol consumed per person per year	Average standard drinks of alcohol consumed a day
Top 5 per cent	35.3%	36.59 litres	8.02 standards
Top 10 per cent	53.2%	27.56 litres	6.04 standards
Top 20 per cent	74.2%	19.23 litres	4.21 standards

The data shows that the heaviest drinking 20 per cent of the population are consuming a clear majority of the alcohol. More than a third of all alcohol drunk in Australia is consumed by the top five per cent of the populations. It is clear from the comments made by the industry that they rely on these 'super consumers' to generate profits. This insight gives an opportunity to determine the impact on the alcohol industry if there was no such thing as a 'super consumer'.

It could be argued that these are the 'super consumers' who the alcohol industry has identified as the top 20 per cent of drinkers; those Australian drinkers who are drinking 74.2 per cent of all the alcohol consumed. These are the drinkers who are consuming the overwhelming majority of alcohol

^a Population figures are based off Australian Bureau of Statistics (ABS) Estimated Resident Population (ERP).

that is available for consumption. While the alcohol industry labels these drinkers ‘super consumers’, these drinkers are in fact consuming alcohol at levels that place them at considerable risk of health harms. We explore this reliance in more detail in the following section.

Impact on the alcohol industry if ‘super consumers’ did not exist: analysis

The National Health and Medical Research Council (NHMRC) *Australian Guidelines to Reduce Health Risks from Drinking Alcohol* (the Guidelines) state that “for healthy men and women, drinking no more than two standard drinks on any day reduces the lifetime risk of harm from alcohol-related disease or injury”.⁴¹

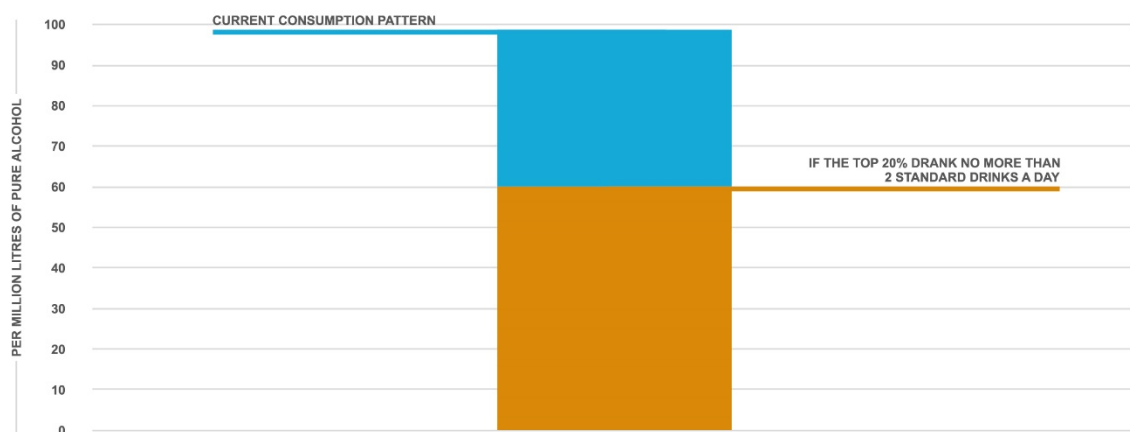
An analysis was undertaken to determine the impact on the alcohol industry if more Australians followed this recommendation and consumed no more than two standard drinks per day. The following section estimates what the total volume of alcohol available for consumption would be if the top 20 per cent of drinkers drank within the NHMRC Guidelines.

To establish this, it was calculated that if the top 20 per cent of drinkers drank no more than two standard drinks a day, it would equate to 9.13 litres of pure alcohol annually.

Therefore, if these drinkers consumed no more than two standard drinks a day, the total alcohol consumed would reduce from 98,635,608.56 litres to 60,187,986.86 litres. This would make 38,447,621.70 litres of pure alcohol surplus to market requirements. This equates to a 39 per cent reduction in the amount of alcohol that the alcohol industry needs to produce.

Figure 4 provides an overview of the current status of alcohol consumption in Australia, in comparison to projected alcohol consumption if the top four quantiles (top 20 per cent) reduced their drinking to the recommended amount of two standard drinks of alcohol per day.

Figure 4. The impact of alcohol consumption if the top 20 per cent of drinkers drank no more than two standard drinks a day.



Conclusion

The size, shape and viability of the alcohol industry is a function of the amount of alcohol sold. It is clear from this analysis of drinking patterns that a reduction in alcohol consumption by the top 20 per cent of Australian drinkers would have a dramatic effect on its size, shape, viability, and overall profitability. Reducing alcohol consumption for the top 20 per cent of Australian drinkers to the levels recommended by the government's alcohol guidelines, would see a 39 per cent decrease in the amount of alcohol being consumed.

The industry has not only identified their most important customers, but also labelled them as 'super consumers' and discussed ways to target this segment. With the top 20 per cent of drinkers consuming 74.2 per cent of the alcohol, it is in the alcohol industry's best interest to ensure that these 'super consumer' continue to consume alcohol at harmful levels. The harms from alcohol result in more than 5,500 deaths and 157,000 hospitalisations in Australia each year. This burden of disease not only has devastating impacts on individuals and their families but also places a huge strain on our health system. This could be dramatically reduced if the alcohol industry did not produce and sell the current amount of alcohol.

However, removing more than 38 million litres of pure alcohol from production clearly is not in the alcohol and alcohol-related industries' best interests and directly challenges their fiduciary responsibility. While the alcohol industry claims to support 'responsible drinking', it does so in a way that ensures profits are not diminished.⁴²

It is therefore not surprising that the alcohol industry continually uses the term 'responsible drinking' without providing any clear guidance on what this constitutes. While the alcohol industry claims to support 'responsible drinking', their inability to define what this means despite the existence of the NHMRC Guidelines signifies the disingenuousness in addressing the misuse of alcohol. If the alcohol industry promoted the NHMRC Guidelines, and their customers took heed of this advice, the impacts on their bottom line would be significant.

The alcohol industry largely opposes policy change that will reduce consumption by Australia's heaviest drinkers; such as regulatory approaches addressing alcohol's price, availability and promotion. This is no surprise, as it is well documented that the alcohol industry only supports alternative policies, where the evidence is weak, and that will have little impact on individuals drinking behaviours and their profits.^{43,44,45}

This report quantifies the estimated levels of over-drinking in Australia. These conservative estimates show that nearly four million Australians are responsible for consuming more than 38 million litres of pure alcohol in excess of what Government health guidelines recommend. In combatting harm caused by alcohol, governments need to adopt firm evidenced-based policies to tackle this excessive drinking. Australia will also need to accept that a consequence of reducing this drinking will be significant effects on the shape and make-up of Australia's alcohol industry.

To date governments have been weak in exploring a problem that has been known about for years. Governments need to take responsibility for the alcohol industry's 'dirty secret', because the alcohol industry won't. The alcohol industry will continue to deny there is a problem and put its economic interests ahead of the nation's health and welfare. *Risky business* bluntly exposes how a billion dollar alcohol industry has become economically dependent on millions of Australians continuing to drink at levels harmful to their health and well-being.

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