



Foundation for Alcohol Research & Education

ALCOHOL USE

AND HARM

DURING COVID-19

DATA REPORT

JULY 2020



Foundation for Alcohol Research & Education

ABOUT FARE

The Foundation for Alcohol Research and Education (FARE) is an independent, not-for-profit organisation working to stop the harm caused by alcohol. Alcohol harm in Australia is significant. Nearly 6,000 lives are lost every year and more than 144,000 people are hospitalised making alcohol one of our nation's greatest preventative health challenges.

As a leading advocate of evidence-based research, FARE contributes to policies and programs that support the public good, while holding the alcohol industry to account. FARE works with leading researchers, communities, governments, health professionals and frontline service providers to bring about change and reduce alcohol harm.

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KEY POINTS

PURPOSE

- This report provides a snapshot of available data on alcohol use and harm during COVID-19 in Australia. A focus is on the period between March – May 2020.
- The report references service provider data, national and international surveys, alcohol purchasing data and news media.

CHANGES IN ALCOHOL HARM

- There has been a steep rise in demand for online Alcohol and Other Drug (AOD) supports.
 - » The National AOD Hotline recorded an approximate doubling in calls in the months of January, February, March, April and May of 2020, compared to the same period in 2019.
- There are indications of increased incidence of family violence across Australia, with 1800RESPECT, the national counselling service for sexual assault, domestic and family violence, recording an 11% increase in contacts compared to this time (May) last year.
 - » There is a significant increase in reports of alcohol in family violence situations. In a joint survey conducted by FARE and Women's Safety NSW, 51% of frontline family violence workers say they've seen an increase in the involvement of alcohol as a stressor in family violence situations since COVID-19 restrictions began.

CHANGES IN ALCOHOL USE

- A number of surveys have measured if Australians report drinking more or less than usual since the spread of COVID-19 in Australia (March 2020 onwards):
 - » FARE commissioned YouGov survey in early April showing a relatively even proportion of those reporting drinking more (18%) and drinking less (17%) than usual during COVID-19
 - » ABS survey in late April-early May indicating 14% report drinking more alcohol than usual, compared to 10% reporting drinking less
 - » An ANU survey in mid-late May finding that 27% report drinking less, compared to 20% drinking more
- The differences in these survey results may be due to a number of factors, such as the different timing of the surveys during a period of rapid change during COVID-19 in Australia. Past evidence prior to COVID-19 also shows people tend to report decreased drinking from this type of survey. Drawing detailed conclusions about frequency and quantity of alcohol use from these types of surveys is therefore difficult. Instead, these surveys provide a snapshot of how the community perceives its alcohol use at a particular point in time. To establish changes in alcohol use trends, comparing data over time is required.
- A recent ANU study is an example of comparing data over time. The study found Australian's reported frequency of alcohol use has increased for the year up to May 2020, compared to previous years. The study found for the year up to May 2020, 33.8% of males reported drinking 3 or more days per week, an increase from 30.3% in 2017-18. The increase was more substantial for females, increasing from 16.2% in 2017-18 to 21.9% in the year up to May 2020.

- A number of potentially problematic alcohol use behaviours during COVID-19 were recorded in a FARE commissioned YouGov survey, including:
 - » Nearly one in seven (13%) Australian drinkers are concerned about the amount of alcohol they or someone in their household is drinking
 - » 12% report drinking on their own more often
 - » 11% report drinking to cope with anxiety and stress
 - » 14% report they have been drinking daily, a near three-fold increase when compared to a January 2020 YouGov survey (5% drinking daily)
- A Hall and Partner's survey in April shows commonly reported reasons for drinking more during COVID-19 are boredom (53%), anxiety and stress (45%), being tempted due to more time at home (43%), to keep spirits up (39%) and loneliness (20%).
- Consumer spending data from Commonwealth Bank shows a spike in spending on packaged alcohol for the week ending 27 March, up by 86% on the same week a year ago.
- Sales results from Woolworths and Coles indicate a significant increase in alcohol sales in the third quarter of 2019-20 (January to March 2020), which was mainly attributed to sales in March. Results also indicated a shift towards cheaper and bulk purchasing of alcohol and online sales.

INTERNATIONAL COMPARISONS

- Surveys in the United Kingdom (UK), United States (US), Finland and New Zealand (NZ) found more people report drinking less than drinking more during COVID-19. The opposite appears to be occurring in Canada, where a greater proportion of people are reporting more drinking than less drinking.

INTRODUCTION

With the outbreak of the COVID-19 pandemic in Australia and associated lockdowns, people are experiencing fear, uncertainty, economic pressures and social isolation. For many people, these factors may contribute to an increased likelihood of alcohol being used at riskier levels and in riskier ways which can increase alcohol harm within the home, such as family violence, alcohol use disorder and suicide. For others, the changes in routine may provide an opportunity to reassess and reduce their alcohol use and lead them to seek out support to make healthy changes.

This Report provides a snapshot of the recent available data on alcohol use and harm during the pandemic in Australia, focusing on the period between March – May 2020.

Before the pandemic, Australians predominately drank alcohol in the home, with 63% of alcohol drunk at the drinker's home, which is the most frequent place of alcohol use for the majority of Australians.¹ Packaged liquor accounted for 80% of all alcohol sold in Australia², with 12% of alcohol drunk at pubs, clubs and bars.³

The COVID-19 lockdown has resulted in nearly all alcohol use occurring in the home, as on-premise venues were shut and gatherings of friends and family were largely banned. The temporary shift to alcohol use solely at home is already increasing some alcohol harms in the home as shown in this report. Past evidence shows alcohol-fuelled family violence regularly occurs in the home⁴, as do suicides involving alcohol.⁵ Monitoring trends in these alcohol harms is an ongoing priority even as lockdown restrictions begin to ease across Australia.

The longer term impact of COVID-19 on patterns of alcohol use is unknown and an important area for future research. As well as presenting current data, this Report concludes by highlighting areas for further investigation into alcohol use and harms.

DATA SOURCES

This Report presents a range of data from various sources including:

- Australian health service demand data, including alcohol and other drug (AOD), mental health, family violence services.
- Recent surveys assessing alcohol use during COVID-19, from a range of sources including:
 - » The Australian Bureau of Statistics (ABS)
 - » The Centre for Social Research Methods at the Australian National University (ANU)
 - » YouGov Galaxy (commissioned by FARE)
 - » YouGov (commissioned by the Alcohol and Drug Foundation)
 - » Hall and Partners (commissioned by Hello Sunday Morning)
 - » Roy Morgan Research
 - » Surveys conducted in a range of countries other than Australia.
- Consumer spending data, including Commonwealth Bank of Australia (CBA) weekly credit and debit card transaction data and other retail activity reports.

FINDINGS

CHANGES IN ALCOHOL HARM

Key points

COVID-19 is causing significant mental distress in Australia, which increases the likelihood of risky alcohol use in the community.

There are early indications of increased demand for online Alcohol and Other Drug (AOD) supports.

There are early indications of increased incidence of family violence across Australia, and increased involvement of alcohol in family violence situations.

A range of acute harms resulting from drinking alcohol in and around licensed premises are likely to have been temporarily decreased due to the closure of pubs, clubs and bars.

MENTAL HEALTH AND ALCOHOL USE

COVID-19 is causing significant mental distress in Australia, which increases the likelihood of risky alcohol use in the community. Evidence from past disease outbreaks indicates that quarantined people experience stress, confusion and anger.⁶ Isolation, more generally, negatively affects a person's social and emotional health.⁷

Early evidence of an increase in adverse mental health impacts from COVID-19 in Australia includes:

- Beyond Blue reported a 30% increase in calls since social restrictions came into force⁸
- Lifeline report that usually they receive 2,500 calls a day but this has reached as high as 3,200, recording its busiest month ever (March), and busiest day ever (Good Friday)⁹
- Australian Bureau of Statistics (ABS) Household Impacts of COVID-19 Survey (14-17 April) found that 35% of Australians felt nervous at least some of the time, compared to 20% in the 2017-18 National Health Survey (NHS). It also reported that 42% of Australians felt 'restless or fidgety' at least some of the time, compared to 24% in the 2017-18 NHS¹⁰
- YouGov survey conducted between 9-13 April found more than 50% of Australians are stressed due to the COVID-19 crisis.¹¹

Alcohol use can exacerbate existing mental health issues. Alcohol impairs self-control¹² and can contribute to someone entering a mental health crisis point. Evidence shows acute alcohol use increases the risk of attempted suicide.¹³ The risk of suicide is also elevated in dependent drinkers, and an increase in population-level alcohol use tends to be associated with an increase in suicide rates.¹⁴

The link between alcohol dependence and adverse mental health is well established. Australian evidence shows 42% of patients with an Alcohol Use Disorder (AUD) also suffered from one or more mental health disorders over a 12-month period.¹⁵

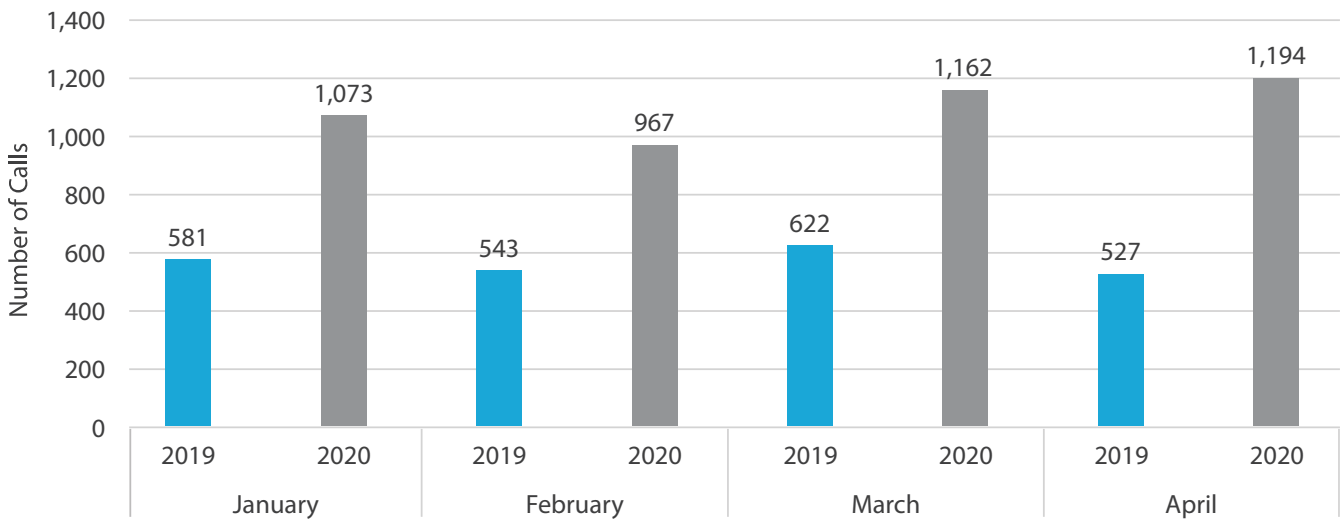
ALCOHOL AND OTHER DRUG (AOD) ISSUES

The psychological impacts of quarantine and isolation can lead to people developing risky alcohol use and even dependence in the longer term.¹⁶ When alcohol is used as a coping strategy, it can then become an entrenched behaviour. People who have previously been alcohol dependent are also in danger of relapsing in the stressful environment caused by a pandemic.¹⁷

The Alcohol Use Disorders Identification Test identifies risk factors for hazardous, harmful and dependent drinking.¹⁸ Those factors are apparent among Australians during COVID-19 restrictions. A YouGov survey in early April found Australians report they are; drinking daily (14%), concerned about their or someone in their households drinking (13%), drinking on their own more often (12%), and drinking to cope with anxiety and stress (11%) (see 'Changes in alcohol use' section below for detail).

Other evidence of increased problems with alcohol and other drugs in Australia during COVID-19 is emerging. The National Alcohol and Other Drug (AOD) Hotline has seen an approximate doubling in calls in early 2020, compared to early 2019¹⁹, as shown in Figure 1 below.

Figure 1 - National AOD Hotline Calls, 2019 to 2020



Other examples of increased demand for AOD support and information services in Australia include:

- Hello Sunday Morning's Daybreak program, a treatment and early intervention app providing online support to those trying to reduce their alcohol use, reports that:²⁰
 - » Member engagement (i.e. existing members logging in to the app) has risen 28.6% in the month leading to 22 April 2020.
 - » New member registrations for the same period was 35.2% higher than for the same period last year.
- The Australian Drug Foundation website, which provides alcohol and drug information services to the community, has reported an 8% increase in website visits in the first quarter of 2020 compared to same time last year.²¹
- Anecdotal reports suggest there has been an increase in calls to rehabilitation centres from people worried about drug and alcohol consumption.²²

AOD services also faced challenges with treatment delivery during COVID-19 as existing models are often based on face-to-face treatment. Some alcohol rehabilitation services have had to close due to these pressures, while other AOD services (like Turning Point and SMART Recovery) have received additional funding to adapt to online models.

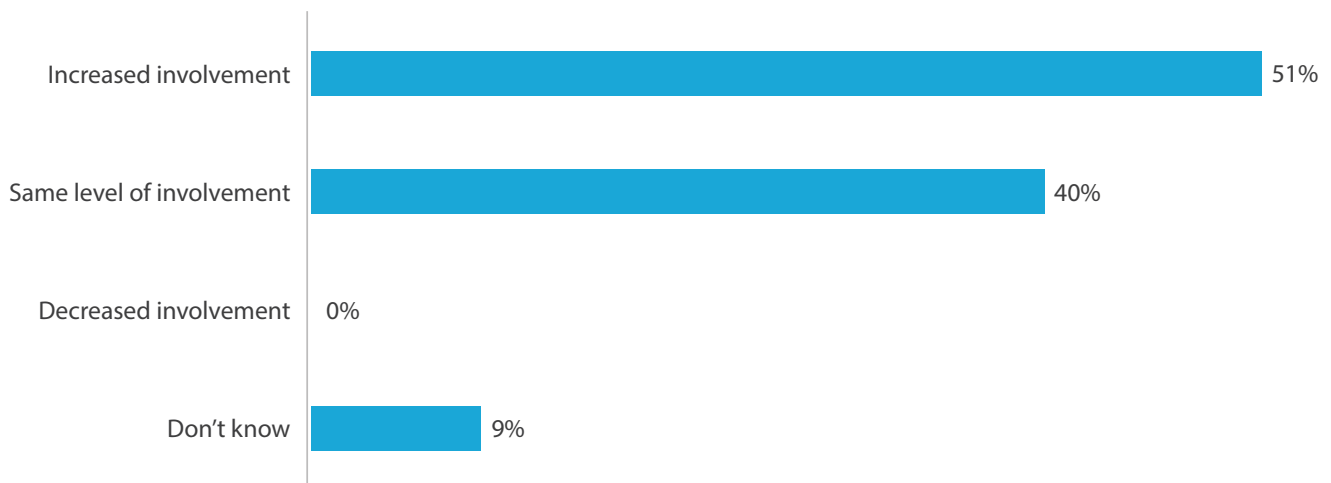
FAMILY VIOLENCE

The COVID-19 crisis and associated isolation in the home can exacerbate family violence in the community. Past evidence establishes a strong link between pandemics and violence against women and children.²⁴

There is emerging evidence of an increase in family violence during COVID-19 across Australia. This early evidence is likely an under-report,²⁵ with services expecting a further rise in caseload as the restrictions ease.

Alcohol use is a risk factor for increased frequency and severity of family violence.^{26, 27, 28} It is estimated in Australia that alcohol-related domestic assaults account for up to 50% of all recorded domestic assaults.²⁹ A Women's Safety NSW and FARE survey in May 2020 found that half (51%) of domestic and family violence specialist service workers had observed an increase in the involvement of alcohol in family violence situations since COVID-19 restrictions, while 40% observed the same level of involvement as prior to the restrictions (see Figure 2).³⁰

Figure 2 - Reported increase or decrease in involvement of alcohol as a stressor in family violence situations since COVID-19 restrictions began



Other indicators of increased incidence of family violence during COVID-19 in Australia include:

- 1800RESPECT, the national counselling service for sexual assault, domestic and family violence has seen an 11% increase in contacts on this time (May) last year.³¹
- The May 2020 Women's Safety NSW survey of frontline domestic and family violence specialist workers found that since COVID-19 restrictions were introduced, 47% reported an increase in their caseload since COVID-19 restrictions began, 38% reported no increase or decrease and 15% reported a decrease.
- A trauma surgeon in the NT reported a 15% increase in the number of people requiring surgery due to family violence in the month leading to 21 April 2020.³²

HARMS TO CHILDREN

Given the increased time spent with children in the home, there is the potential for children to witness alcohol use more often than usual, 'normalising' risky drinking.³³ The potential for children to witness increased family violence is another concern.

DRINK DRIVING

A survey of drivers commissioned by the Australian Road Safety Foundation found that one in four drivers report taking increased road risks since the implementation of COVID-19 restrictions. Driving after having ‘a few alcoholic drinks’ was the third most common risk (3% increase), behind only ‘using a mobile phone while driving’ (9% increase) and ‘running a red light or stop sign’ (5% increase).³⁴

Key points

A number of surveys have measured if Australians report drinking more or less than usual since the spread of COVID-19 in Australia (March 2020 onwards):

- » FARE commissioned YouGov survey in early April showing a relatively even proportion of those reporting drinking more (18%) and drinking less (17%) than usual during COVID-19
- » ABS survey in late April-early May indicating 14% report drinking more alcohol than usual, compared to 10% reporting drinking less
- » An ANU survey in mid-late May finding that 27% report drinking less, compared to 20% drinking more

The differences in these survey results may be due to a number of factors, such as the different timing of the surveys during a period of rapid change during COVID-19 in Australia. Past evidence prior to COVID-19 also shows people tend to report decreased drinking from this type of survey. Drawing detailed conclusions about frequency and quantity of alcohol use from these types of surveys is therefore difficult. Instead, these surveys provide a snapshot of how the community perceives its alcohol use at a particular point in time. To establish changes in alcohol use trends, comparing data over time is required.

A recent ANU study is an example of comparing data over time. The study found Australian's reported frequency of alcohol use has increased for the year up to May 2020, compared to previous years. The study found for the year up to May 2020, 33.8% of males reported drinking 3 or more days per week, an increase from 30.3% in 2017-18. The increase was more substantial for females, increasing from 16.2% in 2017-18 to 21.9% in the year up to May 2020.

A FARE commissioned YouGov survey indicates concerning drinking behaviour during COVID-19:

- » nearly 1 in 7 (13%) Australian drinkers are concerned about the amount of alcohol they or someone in their household is drinking
- » 12% report drinking on their own more often
- » 11% report drinking to cope with anxiety and stress
- » 14% report they have been drinking daily during COVID-19, a near three-fold increase when compared to a January 2020 survey (5% drinking daily).

People who reported drinking more alcohol than usual during COVID-19 are more likely to be drinking daily (37%), concerned about their or someone in their households drinking (32%), drinking on their own more often (29%) and drinking to cope with anxiety and stress (32%).

A Hall and Partner's survey carried out between 2-3 April shows commonly reported reasons for drinking more during COVID-19 were boredom (53%), anxiety and stress (45%), being tempted due to more time at home (43%), to keep spirits up (39%) and loneliness (20%).

Consumer spending data from Commonwealth Bank shows increased spending on packaged alcohol for the week ending 27 March, up by 86% on the same week a year ago. More recent packaged alcohol data for the week of 17 April shows spending is up 4% on a year ago.

Sales results from Woolworths and Coles indicate a significant increase in alcohol sales in the third quarter of 2019-20 (January to March 2020), which was mainly attributed to sales in March. Results also indicated a shift towards cheaper and bulk purchasing of alcohol and online sales.

SURVEYS

Since COVID-19 restrictions began in Australia in mid-late March, there have been several national surveys that have measured how alcohol use may be changing.

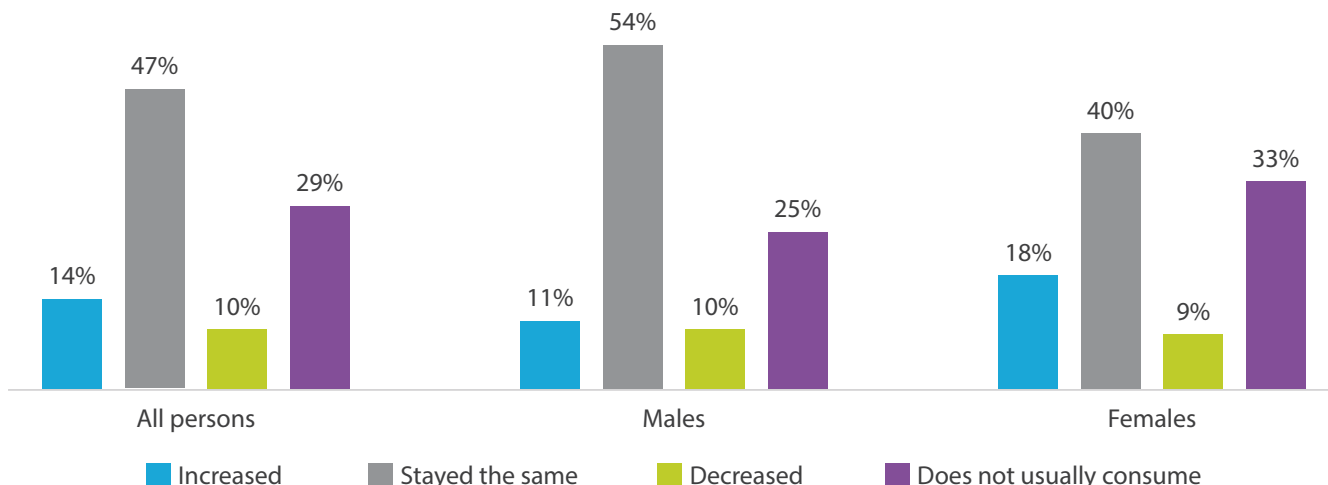
- Australian Bureau of Statistics (ABS) Household Impacts of COVID-19 Survey, a telephone survey series, the third of which assessed alcohol use, conducted between 29 April to 4 May 2020 of 1,059 respondents (the 'ABS survey')³⁵
- An ANU Centre for Social Research Methods survey (using the 34th ANUpoll), conducted between 12-24 May 2020 of 3,219 respondents (the 'ANU survey')³⁶
- YouGov Galaxy online survey, commissioned by FARE, conducted between 3-5 April 2020 of 1,045 respondents (the 'YouGov survey')
- YouGov online survey, commissioned by the Alcohol and Drug Foundation, conducted between 14-17 May 2020 of 1,007 parents of school-aged children (the 'ADF survey')³⁷
- Hall and Partners online surveys, commissioned by Hello Sunday Morning, conducted on two separate occasions with a new sample - 2-3 April 2020 of 320 respondents and 6 May 2020 of 319 respondents (the 'H&P surveys')³⁸
- Roy Morgan Single Source Australia, an ongoing online survey with most recent data collection in March 2020, derived from 50,000 responses per year (the 'Roy Morgan survey').³⁹

This section assesses findings from these various sources, noting similarities and differences, and pays particular attention to the ABS and YouGov surveys given their similar methodology and sample sizes.

SELF-REPORTED ALCOHOL USE

Results from the ABS survey indicate a higher proportion of people reporting drinking more alcohol (14%) than those drinking less (10%) since COVID-19 restrictions began. The ABS survey also found that women are more likely to report increased alcohol use (see Figure 3 below), in contrast to the YouGov survey that found men are more likely to report drinking more (see results below).

Figure 3 - Persons aged 18 and over, reporting of consumption of alcohol in the last four weeks compared to normal, ABS survey



The YouGov survey found that nearly one in five Australians (18%) reported drinking more alcohol since COVID-19 restrictions began, and 17% reported drinking less (see Table 2).

Table 2 - Drinking behaviour since COVID-19, YouGov survey

Question: ‘Since the escalation of the COVID-19 pandemic in Australia, are you are drinking more or less alcohol?’

ALCOHOL USE DURING COVID-19	PROPORTION OF RESPONDENTS (%)*
A lot more	5
A little more	13
About the same	38
A little less	7
A lot less	10
I don’t drink alcohol	27
Net: Drinking More	18
Net: Drinking Less	17

*Sample size n=1,045

Demographic analysis reveals that those whose drinking increased are:

- more likely to be men (20% compared to 15% for women)
- more likely to be aged 35-49 years (25%) and 18-34 years (22%), compared to those aged over 50 (10%).

YouGov survey results were also analysed by state and territory of residence (Table 3). Differences between states and territories were not statistically significant when compared between each other. A breakdown of results for Tasmania, Northern Territory and Australian Capital Territory was not possible due to small sample sizes.

Table 3. Alcohol use during COVID-19 by state/territory, YouGov survey*

Question: ‘Since the escalation of the COVID-19 pandemic in Australia, are you are drinking more or less alcohol?’

ALCOHOL USE COMPARED TO BEFORE COVID-19	NATIONAL (%)	NSW (%)	VIC (%)	QLD (%)	SA (%)	WA (%)
Net: Drinking More	18	20	17	18	15	15
Net: Drinking Less	17	17	18	15	19	16

*National sample size n=1,045; NSW n=308; VIC n=263; QLD n=215; SA n=105; WA n=105

The Centre for Social Research Methods at the ANU conducted a survey in mid-late May 2020 also aimed at understanding how alcohol use had changed during COVID-19. Unlike the ABS and YouGov surveys, this study also compared May 2020 results to previous surveys conducted prior to COVID-19. The two major findings on alcohol use levels emerging from this study were:

- In the May survey, 27% reported drinking less since the spread of COVID-19 in Australia, compared to 20% who report drinking more. However, the study noted that this finding needed to be taken into context, explaining:
 - » “...it should be noted that in normal times people tend, on average, to feel that their alcohol consumption has declined. For example, in the 2017/18 NHS [National Health Survey], only 9.2 per cent of males and 10.8 per cent of females thought that their alcohol consumption had increased over the previous 12 months, whereas 22.3 per cent of males and 20.8 per cent of females thought that their alcohol consumption had decreased. That is, compared to the pre-COVID-19 period, the proportion of people who report that their alcohol consumption has increased is far higher in our survey (May 2020).”
- The May survey also measured frequency of drinking, comparing results to 2017-18 data from the National Health Survey and National Drug Strategy Household Survey. The study found Australian’s reported frequency of alcohol use has increased for the year up to May 2020, compared to previous years. The study compared the proportion of people who estimate drinking 3 or more days per week in the year leading to May 2020 and the year 2017-18. The study found for the year up to May 2020, 33.8% of males reported drinking 3 or more days per week, an increase from 30.3% in 2017-18. The increase was more substantial for females, increasing from 16.2% in 2017-18 to 21.9% in the year up to May 2020. As the survey asked respondents to reflect on 12 months prior to May 2020, this includes COVID-19 lockdowns and many months preceding it, making it difficult to isolate the impact of COVID-19.

In addition to the ABS, YouGov and ANU surveys, there have been other surveys measuring self-reported alcohol use since the beginning of COVID-19 restrictions in Australia:

- **H&P surveys:** The April H&P survey found 17% are drinking more, but a larger proportion are drinking less at 22%. This difference levels out to 21% reporting drinking more and 21% drinking less when only looking at those aged 30-59 years old. Results from the May H&P survey found that 20% are reporting drinking more, and 29% are reporting drinking less. The increase in those reporting drinking less was statistically significant when compared to the April H&P survey.
- **Roy Morgan survey:** This survey took a different approach to measure alcohol use during COVID-19, asking respondents if they had consumed alcohol in the last four weeks, then comparing the result to a year ago. The survey found 66.3% of Australians aged 18 years and over in the year to March 2020 consumed alcohol in an average four-week period, slightly down from 67.5% twelve months ago.

PATTERNS AND MOTIVATIONS OF ALCOHOL USE

The YouGov survey reported that nearly one in seven (13%) Australian drinkers are concerned about the amount of alcohol they or someone in their household is drinking during COVID-19 (see Table 4), that 12% say they are drinking on their own more often and 11% say they are drinking to cope with anxiety and stress. For people who report purchasing and drinking more alcohol, these figures were significantly higher.

Table 4. Patterns and motivations for alcohol use during COVID-19, YouGov survey*

Question: 'Since the escalation of the COVID-19 pandemic in Australia, which of the following is true for you?'

ALCOHOL USE PATTERNS AND ATTITUDES	DRINKERS (%)**	HOUSEHOLDS WHO ARE BUYING MORE (%)***	PEOPLE DRINKING MORE (%)#
I have been drinking alcohol to cope with anxiety and stress	11	28	32
I have been drinking alcohol daily	14	34	37
I have started drinking alcohol and ended up drinking more than I thought I would	7	24	24
Net: I am concerned with the amount of alcohol that I am drinking or someone in my household is drinking ##	13	32	32
I am concerned with the amount of alcohol that I am drinking	7	19	21
I am concerned with the amount of alcohol someone in my household is drinking	8	18	18
I have been drinking alcohol on my own more often	12	28	29
I have started drinking earlier in the day	8	20	24
None of the above	63	18	17

*Sample size n=1045

** Sample size n= 761 (excluded identified non-drinkers)

*** Sample size n=202 (households who reported purchasing more since COVID-19 and excluding respondents who indicated they 'don't drink alcohol')

Sample size n= 187 (respondents who report they drank a lot more or a little more since COVID-19)

Combined finding of those who are concerned with the amount they are drinking or the amount someone in their household is drinking

One in seven (14%) Australian drinkers report they have been drinking daily during COVID-19, an almost three-fold increase when compared to a FARE commissioned YouGov survey conducted in January 2020 (n=1,791) that found only 5% of Australians reported drinking daily.⁴⁰ A similar pattern has emerged in New Zealand - a survey in late 2019 found 11% reporting daily drinking, while an April 2020 survey found this increased to 19%.⁴¹

Demographic analysis of the YouGov survey reveals that:

- Men (11%) are more likely than women (7%) to say they are drinking on their own more often.
- Australians aged 25-34 year (15%) and 35-49 year (16%) are concerned about their drinking or someone in their household. This is significantly higher than 18-24 year olds (7%) and those aged over 50 (5%).
- Younger Australians are more likely to be drinking to cope with anxiety and stress (10% for 18-24 years, 13% for 25-34 years and 10% for 35-49 years) when compared to those aged over 50 (5%).

The ANU survey, H&P surveys and the ADF survey also asked about patterns and motivations of alcohol use:

- **ANU survey:** The study found that job loss or decline in working hours to be strong predictors of increased alcohol use in men. This is in comparison to women who had child-care responsibilities as a strong predictor for increased alcohol use.
- **H&P surveys:** The April survey found the most common reasons for drinking more during COVID-19 were boredom (53%), anxiety or stress (45%), being tempted due to more time at home (43%), to keep spirits up (39%) and loneliness (20%). The follow-up survey in May found similar results; however, the proportion of people reporting boredom as a reason decreased to 39%.
- **ADF survey:** The survey found 14% of parents report drinking alcohol on a daily basis. Over a third (38%) of parents cited heightened feelings of anxiety and stress as the number one reason for increased alcohol use. One in five parents who've increased their alcohol use during isolation cited extra video socialising with friends as a key factor for boosting their alcohol intake.

PATTERNS IN ALCOHOL PURCHASING

Survey results

The YouGov survey found that one in five (20%) Australians reported that their households are buying more alcohol than usual during the first month (March-April) of COVID-19 restrictions in Australia. By contrast, 19% indicated they were purchasing less alcohol (see Table 5).

Table 5. Alcohol purchasing during COVID-19, YouGov survey

Question: 'Since the escalation of the COVID-19 pandemic in Australia, my household has:'

ALCOHOL PURCHASING DURING COVID-19	PROPORTION OF RESPONDENTS (%)*
Purchased a lot more alcohol than usual	6
Purchased more alcohol than usual	13
Purchased about the same amount of alcohol as usual	39
Purchased less alcohol than usual	8
Purchased a lot less alcohol than usual, or no alcohol	10
No one in our household ever purchases alcohol	23
Net: Purchased more alcohol	20
Net: Purchased less alcohol	19

*Sample size n=1,045

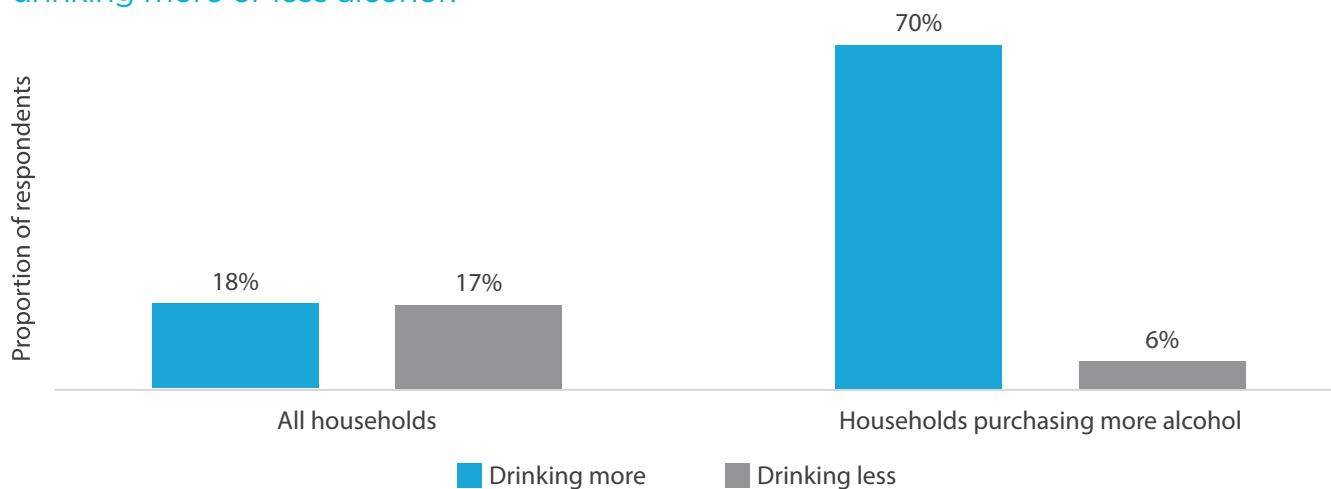
Demographic analysis reveals that those who are purchasing more are:

- More likely to be men (22%) compared to women (17%).
- Most likely to be aged 35-49 years old (27%) and 18-34 years old (24%), compared to those aged over 50 (12%).

Nearly three quarters of people who are purchasing more are drinking more. When only looking at households who are purchasing more, the majority (70%) of these households report drinking more alcohol than usual, far higher than for all households (see Figure 6 below).

Figure 6 - Drinking behaviour since COVID-19, all households vs households purchasing more alcohol, YouGov survey*

Question: 'Since the escalation of the COVID-19 pandemic in Australia, are you are drinking more or less alcohol?'



*Sample size for all households is n=1045, sample size for households purchasing more alcohol is n=202

CONSUMER SPENDING DATA

Several sources of Australian consumer spending data indicate there was a spike in spending on alcohol in March and April 2020.

National Accounts data released by the ABS on 3 June 2020⁴² indicates increased spending on takeaway alcohol in the financial quarter ending March 2020. Table 6 provides quarterly estimates of household expenditure, in units of a million dollars, for the year leading up to March 2020. The table also calculates the percentage change between expenditure in the quarterly estimate of March 2019 and the quarterly estimate of March 2020. As the national result shows, expenditure increased by 4.7% in March 2020 compared to the same quarter a year ago.

Table 6. Household expenditure on alcohol by state/territory, ABS data (\$ millions)*

QUARTER	NSW	QLD	VIC	WA	SA	TAS	NT	ACT	NATIONAL
Mar-2019	1973	1101	1023	461	386	113	41	77	5175
Jun-2019	1980	1112	1024	462	387	114	41	77	5197
Sep-2019	1976	1099	1018	463	384	116	41	75	5172
Dec-2019	2013	1119	1019	470	384	117	42	75	5239
Mar-2020	2086	1151	1058	482	402	120	44	77	5420
% change from March 2019 to March 2020	5.7%	4.5%	3.4%	4.6%	4.1%	6.2%	7.3%	0.0%	4.7%

*Data is derived from ABS sample surveys. The specific data item is 'Final consumption expenditure – Alcoholic beverages: Chain volume measures', seasonally adjusted series.

Commonwealth Bank of Australia (CBA) credit and debit card data showed that spending on ‘alcohol goods’ (i.e. bottle shops) peaked in Australia for the week ending 27 March, up by 86% on the same week a year ago. Table 7 shows available CBA data on alcohol spending. For the week ending 17 April, spending on alcohol goods was up 4% from last year, while spending on alcohol services (pubs, clubs and bars) was down 73% from last year, due to the closure of many of these venues as a result of COVID-19 isolation measures.⁴³

Table 7. Consumer spending on alcohol, CBA data

WEEK ENDING	OFF-LICENCE ALCOHOL (% CHANGE FROM SAME WEEK LAST YEAR)	ON-LICENCE ALCOHOL (% CHANGE FROM SAME WEEK LAST YEAR)	TOTAL ALCOHOL (% CHANGE FROM SAME WEEK LAST YEAR)
20 March	Data not available	Data not available	+ 20.4%
27 March	+ 86%	- 49%	+ 34%
3 April	Data not available	- 71%	- 10% (approx.)*
10 April	+ 23%	- 72%	- 15% (approx.)
17 April	+ 4%	- 73%	- 24%

*Approximately due to only charts being supplied by CBA, not exact figures

Other sources of consumer spending data also indicate higher than normal spending on alcohol during COVID-19 restrictions in Australia:

- **Illion and AlphaBeta data:** Weekly Australian consumer spending data provided by credit bureau illion and economic consultants AlphaBeta (part of Accenture)⁴⁴ indicates for the week of 4-10 May, spending on ‘alcohol and tobacco’ was up 48%.
- **National Australia Bank (NAB) Cashless Retail Sales Index:** The March 2020 NAB index found that the ‘liquor and other specialised food’ was the sub-industry with the greatest growth compared to March 2019, growing 40.2%, while ‘supermarket and grocery stores’ were up 34.5%⁴⁵. Their April 2020 index found this growth continued.⁴⁶

While consumer spending is useful to give insights into alcohol purchasing, there are challenges in drawing inferences about the volume of alcohol sold. There is evidence customers are shifting to cheaper bulk packaged alcohol (see ‘Retail activity reports’ below). This means changes in spending may not fully reveal a shift to larger volumes of alcohol sold. Alcohol volume sales data for the relevant period of COVID-19 is not yet available as it is reported annually, with a lag, and only in some Australian states and territories (see ‘Areas for further investigation’ below).

RETAIL ACTIVITY REPORTS

Reports from alcohol retailers also indicate changes in consumer behaviour during COVID-19:

- **Shift towards cheap bulk packaged alcohol:** Australia’s largest retailer of alcohol, the Woolworths Group (43.7% market share for packaged liquor) reported strong sales growth in alcohol in its third quarter report for 2019-2020, with Endeavour Drinks total sales up by 9.5% in Q3.⁴⁷ Coles Liquor sales revenue for the third quarter of the 2019-20 financial year was \$740m, up 6.1% on the corresponding prior period.

Both Woolworths and Coles note that consumers were seeking lower-priced alcohol. Woolworths noted that “some trading down was evident as customers shifted towards larger pack sizes and away from premium products.” Meanwhile, Coles noted that “liquor experienced margin deterioration during the period as customers moved towards more bulk and value-oriented products.”⁴⁸

- **Increased use of online sale and delivery:** There have been a number of reports from online retailers about strong growth in the online sale and home delivery of alcohol. Woolworths, the largest player in online alcohol sales, saw sharp rises in online sales for key brands. BWS saw a 200% spike in online sales for the first week of restrictions and Dan Murphy's recorded a 43% rise in online sales.⁴⁹

Meanwhile, speciality online retailers also reported strong growth. Online wine retailer Vinomofu reported a 50-75% increase in sales since the beginning of COVID-19⁵⁰ and retail chain Blackhearts and Sparrows indicated an online sales surge of eight to ten times its usual volume.⁵¹

INTERNATIONAL SURVEYS OF ALCOHOL USE

Key points

Surveys in the UK, US, Finland and NZ indicate that more people are reporting drinking less than drinking more during COVID-19. The opposite appears to be occurring in Canada, where a greater amount of people report drinking more than drinking less

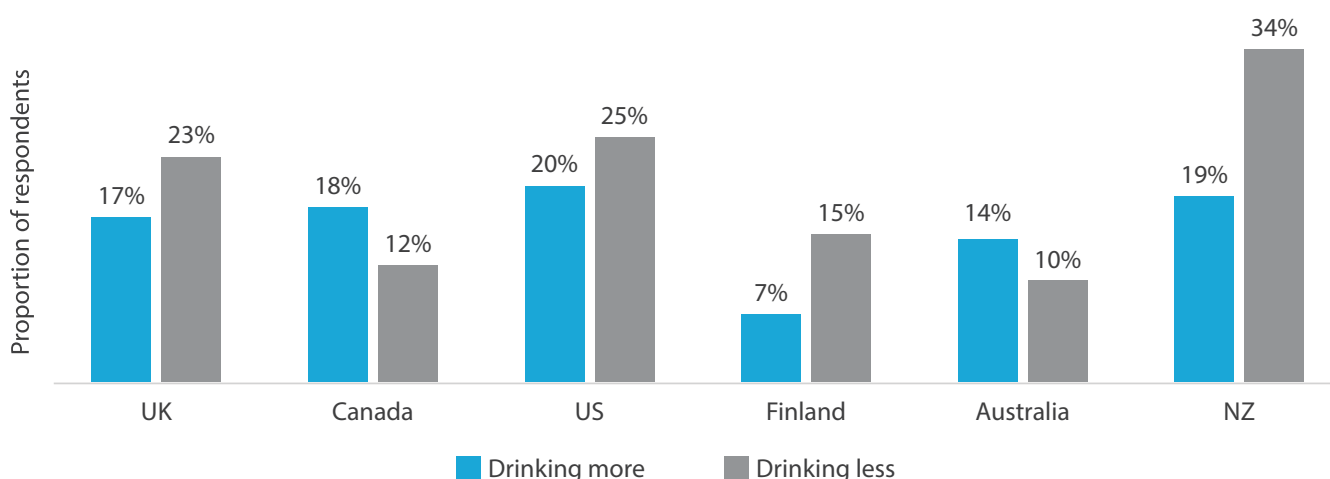
Surveys in Canada, NZ and the US indicate those drinking more are more likely to be under 50 years of age

There is emerging evidence from other countries of how alcohol use is being affected by COVID-19 lockdown measures.

Figure 7 compares findings from surveys in five countries (including Australia), conducted in late March-early April, measuring self-reported increases or decreases in alcohol use during COVID-19.⁵² As this comparison is based on different surveys, differences in survey methods should be noted while drawing conclusions.

Figure 7 indicates that in the United Kingdom (UK), United States (US), Finland and New Zealand (NZ), those reporting drinking less during COVID-19 is higher than those reporting increased drinking. This is not the case for Canada, where those reporting greater drinking is higher than those drinking less. In Australia, similar results are observed from the ABS survey (collected later in early May), although it should be noted the YouGov survey found an even split and the ANU survey found a greater amount reporting less drinking, as discussed. These comparisons between countries should of course be made with caution as people are known to underestimate their drinking levels.

Figure 7 - Self-reported alcohol use during COVID-19, selected countries⁵²



*Australian data from ABS telephone survey, sample size n=1,059, 29 April – 4 May

*UK data from YouGov online survey, sample size n=2,639, 25 March

*Canada data from Canadian Centre for Substance Use and Addiction commissioned Nanos Poll (phone and online), sample size n=1036, 30 March to 2 April

*US data from YouGov online survey, sample size n=12,118, 23-24 March

*Finland data from Taloustutkimus for Yle survey, sample size n=>1,400, April

*NZ data from Te Hiringa Hauora/Health Promotion Agency commissioned Nielsen online survey, sample size n=1,190, 7-13 April, results are for those who had drunk in the past month

Evidence from the Canadian Nanos poll, as well as a crowdsourced survey by Statistics Canada,⁵³ found that those reporting increased drinking are more likely to be under 50 years old. This aligns to survey results in Australia, NZ and the US.

More detailed survey research is also emerging in the UK, including:

- A UK survey⁵⁴ finding that those who previously drank the most alcohol are the ones most likely to have increased their drinking during COVID-19 – with 18% of daily drinkers increasing the amount of alcohol they drink since the lockdown. Similarly, the survey found those who previously drank the least are those who cut back on their drinking.
- An aggregation of UK surveys prior to March 2020, compared with an April 2020 survey, found that the lockdown was associated with an increase in the prevalence of high-risk drinking, and no increase in smoking prevalence.⁵⁵

AREAS FOR FURTHER INVESTIGATION

Key points

To understand the impacts of COVID-19 on alcohol use and harm, further monitoring and research is needed, specifically on:

- » alcohol sales data
- » estimates of alcohol and drug use from wastewater analysis
- » heavy and dependent drinking patterns
- » alcohol-fuelled injury, violence and deaths
- » demand for AOD services.

The data presented in this Report provides a snapshot of how COVID-19 is impacting alcohol use and associated harms in Australia. Further monitoring and research is vital to understand future impacts and how we can mitigate against COVID-19 exacerbating alcohol harms.

Below are identified areas for further investigation:

- 1. Investigating if heavy drinkers are drinking more:** We know that 10% of Australians drink over half (54%) of all alcohol consumed in Australia.⁵⁶ It is likely that the people buying more and drinking more during COVID-19 make up a large proportion of these drinkers. This raises concerns about heavy drinkers - especially those who are alcohol dependent - increasing their alcohol use and therefore increasing risks to their health. UK survey data supports this conclusion - showing that those who are drinking more often during COVID-19 are also likely to be drinking more per session.⁵⁷ A rise in heavy drinking is concerning because of the social and health impacts on the drinker and those around them, as well as a potential strain on health and social services in future. Further research is needed into how COVID-19 is impacting heavy drinking, and potentially impacting dependent drinkers.
- 2. Monitoring alcohol-fuelled injury, violence and deaths:** A number of data sources can be drawn on in future to understand if alcohol-fuelled harms are increasing due to COVID-19. Sources include hospitalisations involving alcohol; assault, traffic and family violence offences that involve alcohol; and suicides that involve alcohol.
- 3. Monitoring demand for AOD services:** There have been some early indications of increased demand for alcohol and other drug online supports since the COVID-19 outbreak in Australia. However, further monitoring will be needed to assess demand growth in the short term and long term.
- 4. Monitoring wholesale alcohol data:** While card transaction data gives an indication of dollars spent, many states and territories collect and report wholesale data that allows the calculation of actual volume of alcohol sold in a given year. The ABS also calculates this at a national level through excise, import and sales data. Once relevant data for the financial year 2019-2020 is available, this can be analysed to gauge more precise measures of alcohol use. More frequent sales data, such as quarterly reporting, is needed to accurately track changes in alcohol sales and assess consumption changes.
- 5. Wastewater analysis:** The Australian Criminal Intelligence Commission (ACIC) releases regularly data from their National Wastewater Drug Monitoring Program, providing indications of drug use (including alcohol) in participating cities. Future reports will be monitored to understand how alcohol use has changed during and after COVID-19 restrictions.

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