

# **Report: Survey of the Availability and Purchase of Alcohol in the Highlands**



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## **Report: Survey of the Availability and Purchase of Alcohol in the Highlands**

### **Introduction**

This survey was developed on behalf of the Highland Alcohol and Drug Partnership (HADP) and the Directorate of Public Health and Health Policy to provide a public opinion about the availability and purchase of alcohol in the Highlands. Some of this information has been used as evidence in the preparation of the 2018 Alcohol Over Provision statement<sup>i</sup> due to be considered by the Licensing Board in September 24 2018.

In total there were 4217 responses, an unprecedented response to this type of survey, and demonstrates that in Highland the population who responded were interested in the availability of alcohol and licensing.

### **List of Contributors**

Thank you to everyone who has contributed to this report. It hasn't been possible to name everyone but all contributions have been highly valued. A particular thank you to colleagues from the Highland Alcohol and Drug Partnership and the Public Health Epidemiology and Science team.

# Survey of the availability and purchase of alcohol in the Highlands

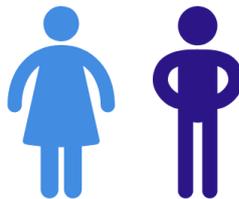
A survey developed on behalf of the Highland Alcohol and Drug Partnership (HADP) and the NHS Highland Directorate of Public Health and Policy to provide public opinion about the availability and purchase of alcohol in the Highlands.

How many survey responses were received?

**4,217 people**

though not everyone responded to every question

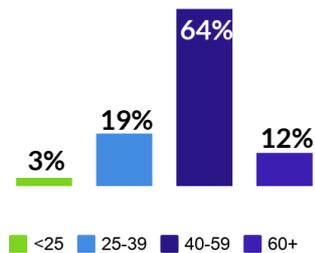
Who responded to this survey?



72%

26%

What age were survey respondents?



## What did people say?



88% agreed with the statement "Alcohol is part of Highland life"



88% agree that "There are enough places selling alcohol in the area where you live"



72% buy alcohol from a supermarket most frequently



63% agree that "When alcohol is more available people tend to drink more"



58% travel for less than 15 minutes to purchase alcohol



77% agree that "there should be time restrictions on the sale of alcohol"



52% are able to buy off-sales alcohol from between 1 to 6 places within a 5 minute walk of their home



83% agree that "alcohol can have a harmful impact on family life"

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## **1. Background**

Alcohol is becoming ever more widely available, and from a greater variety of places. It can now be bought in venues such as cinemas, sports clubs, village shops as well as large retail outlets. This might make it seem like the provision of alcohol is just an everyday product but it should not be treated as such.

To help understand what provision and overprovision might look like in Highland qualitative and quantitative data was collected and presented in an Alcohol Overprovision Provision Statement to the Highland Licensing Board. It is the Licensing Board's responsibility to decide what overprovision is within the Highland council area and then to apply this decision to all future alcohol license applications.

In 2013 an Highland Alcohol Over Provision Statement was developed based on available evidence and included the views of the public collected through survey tools. In January 2018 a similar survey was designed seeking the views of the public about the impact of alcohol accessibility, availability and affordability. Where possible comparisons have been made between 2013 and 2018 but with a focus on the impact of alcohol on children and young people some extra questions were added.

### **1.1 Method**

The 2013 the survey monkey tool was reviewed by a Public Health and HADP team. A questionnaire produced by the Aberdeen ADP and Aberdeen Licensing Forum<sup>ii</sup> provided a useful starting point and some questions appear in the Highland Questionnaire. We extend our gratitude to both organisations. Changes were made to incorporate new policy changes and also to include questions about the impact of alcohol beyond that of the individual. This is to reflect changes in government policy towards prevention and recovery within a family context.

The 2018 questionnaire was piloted in December 2017 and distributed in January 2018 through HADP and NHS networks. These consisted of the statutory and third and independent sectors. A reminder was sent one week before the closing data, the 16 April 2018.

The survey was designed to be quickly completed and therefore used a mixture of scales and tick box responses. Respondents were able to provide a comment for questions and there were two open ended questions; the first to capture views on the impact of alcohol on children and families, and the second invited any other comments.

The final questionnaire consisted of 25 questions in 8 sections

**Table 1: Structure of the Questionnaire**

<b>Section</b>	<b>Number of Questions</b>	<b>Content</b>
Introduction	1	Opinion about alcohol being part of Highland life.
Purchasing	5	Place, purchasing behaviour, frequency, travel, travel time
Availability	2	Opinion about alcohol availability, restrictions
Promotions	2	Influence of promotions
Drinking at home	2	Opinion about alcohol drunk at home
Children	2	Opinion about potential harm of alcohol on children; legal age to drink
Background/ Demography	7	Age group, gender, ethnic background, disability, postcode and nearest town
General	1	Comments

There are limitations when using survey monkey, for example, the audience is self selecting to those who have something to say about the topic and the respondent requires access to the internet as well as some technical knowledge about how to complete a questionnaire. Looking at the respondent profile, it is skewed towards women in the age group of 40-60.

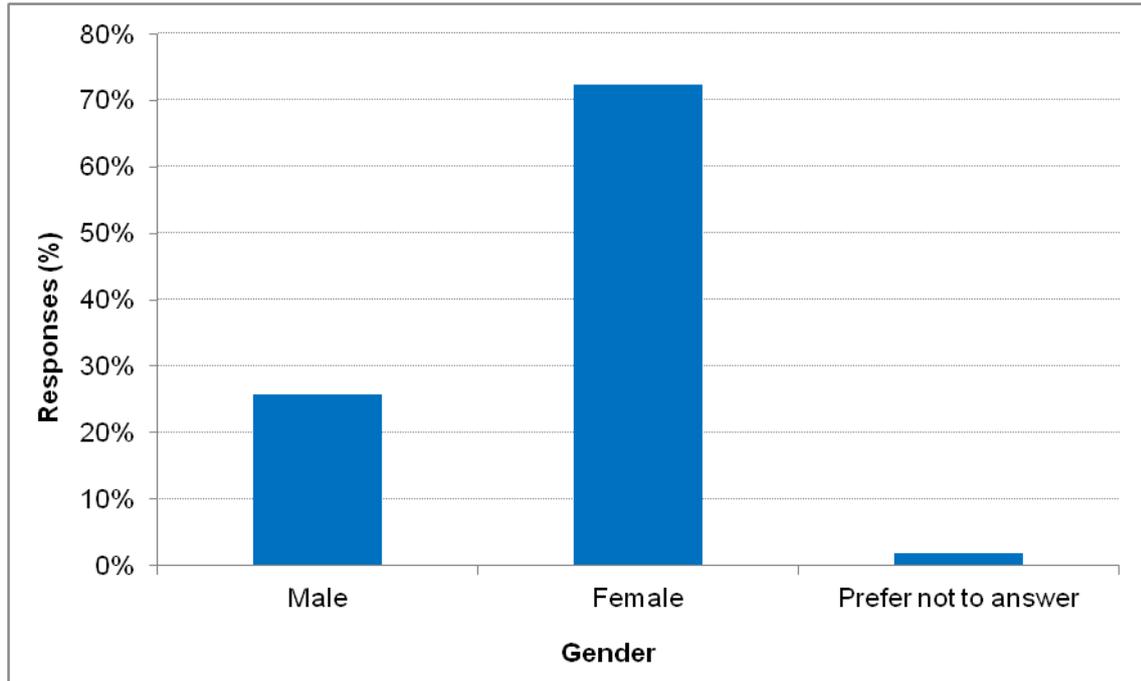
## **1.2 Demographics**

Information about age, gender and place of residence were asked to gain an insight into who had responded and the spread throughout Highland.

## **1.3 Gender**

The respondents were asked to if they were male, female or preferred not to say. In total there were 3727 responses; 26% (958) were male and 72% (2696) were female. 2% of respondents preferred not to say.

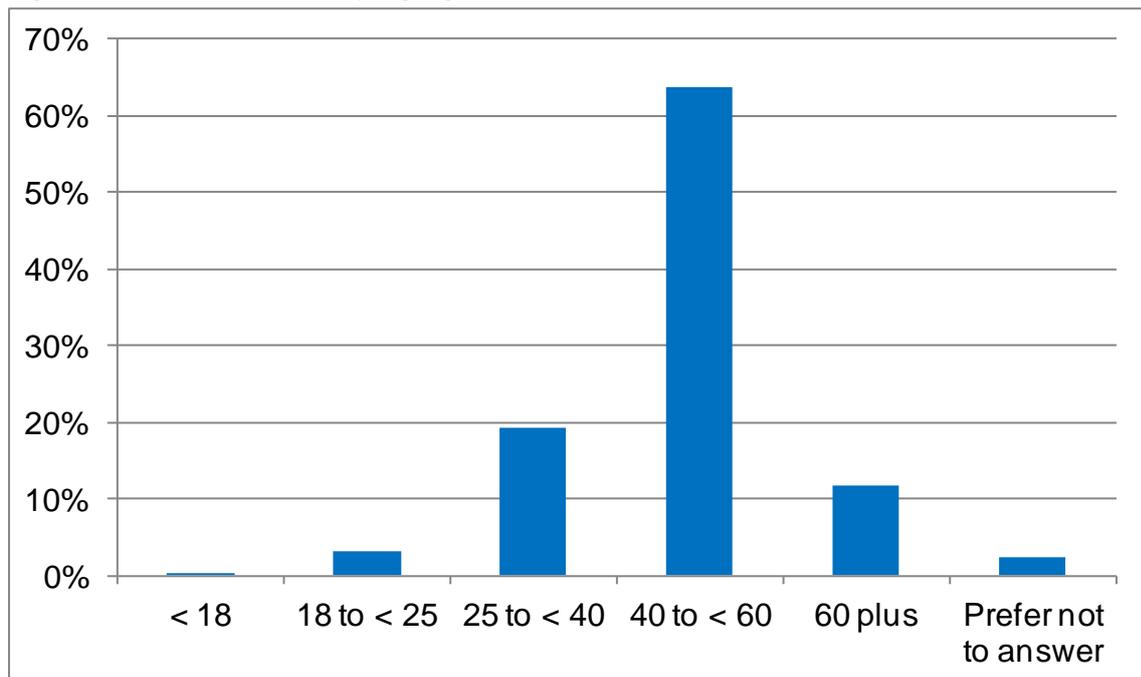
**Figure 1: Respondents by gender (N=3727)**



#### 1.4 Age

In total there were 3732 respondents to this question. The majority of respondents 64% (2377) were from the 40 to less than 60 age category followed by 25 to less than 40 age category 19% (718). 12% (439) of respondents were from the 60 plus category followed by 3% (112) from the 18 to less than 25 age category. Only 2% answered from the under 18 years of age category.

**Figure 2: Respondents by age group (N=3732)**



## 1.5 Ethnic Background

Most respondents categorised themselves as 'White Scottish' 72% (2704); 'Other White British' 19% (692); 'Any Other Ethnic Group' 2% 83 or 'White Irish' 1% (53).

Of note in 2013 respondents from the 'White Scottish' category were 78% (299) but the overall number who responded to the survey was less at 420.

## 1.6 Respondents with a disability

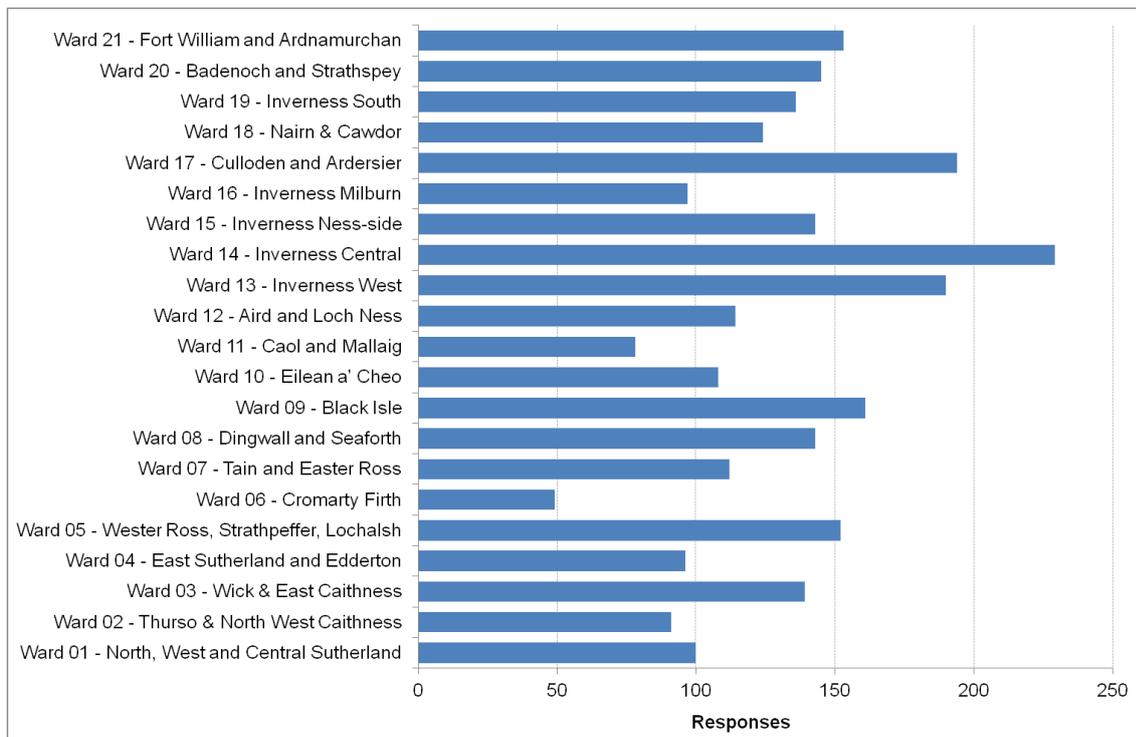
There were 3712 respondents to this question. 96% (3557) categorised themselves as not disabled and 1% (48) categorised themselves as disabled. 3% (107) preferred not to say.

## 1.7 Multi-Member Wards

Two thirds of survey respondents (2,754, 65%) reported upon the ward area where they live. All twenty one ward areas were represented although some had relatively few responses. Most responses were from Inverness Central 8% (229) and least from Cromarty Firth 2% (49). As expected the responses tended to represent ward population sizes.

See appendix 1 for detailed list.

**Figure 3 Number of questionnaires returned by ward**



## 2. Results

In 2018 4217 people responded but not everyone answered every question.

In 2013 605 people responded but not everyone answered every question.

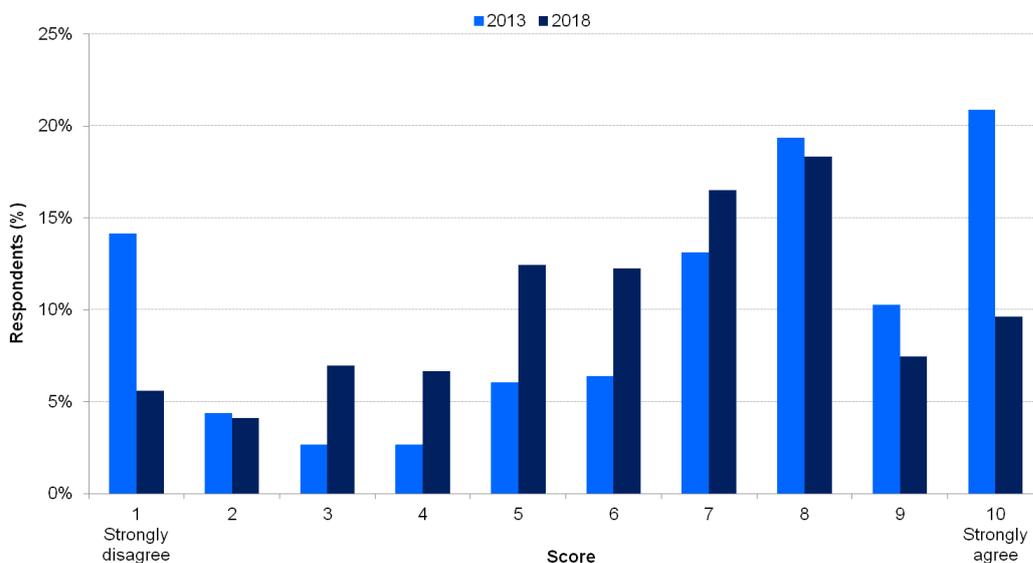
Where possible the report contains comparison data with 2013.

### Question 1: Alcohol is part of Highland Life. Do you agree or disagree with this statement?

Respondents were asked to score on a scale 1 to 10, with 1 being the lowest and 10 being the highest. In 2018 3967 respondents answered this question.

In 2018 the majority (88%) of respondents agreed with this statement, which was significantly more than the 78% in 2013. When the highest three scores (8 to 10) are added together over two thirds of people (69%) in 2018 strongly agree that 'there are enough places selling alcohol in the area where they live'. This is an increase in public opinion compared to 61% reported in 2013. Figure 4 also shows that when asked how strongly they agree almost half (45%) of respondents chose the strongest score of 10.

**Figure 4: Alcohol is part of Highland Life? (N=3967)**



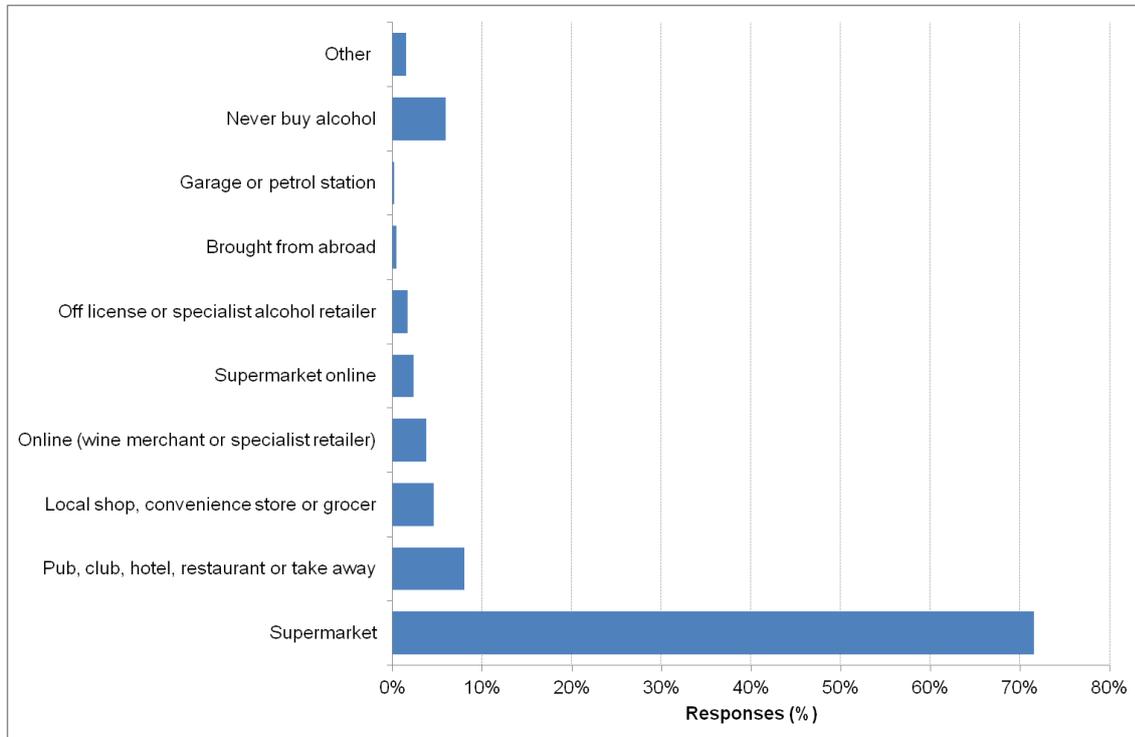
Data source(s): Directorate of Public Health, NHS Highland

Base: All respondents 2013 (591) and 2018 (3803). Disagree = score 1-4, Agree = score 5-10

### Question 2: Where do you buy alcohol most frequently?

In 2018 Figure 5 shows that 72% (2911) of respondents purchased alcohol from a supermarket. The second highest category was the pub/club/hotel/restaurant or take away at 8% (327) and the third highest was the local shop/convenience store/grocer at 5% (186).

Figure 5: Where do you buy alcohol most frequently? (N=4067)



In 2013 where the public purchased their alcohol from was similar in terms of the place of purchase. The supermarket was the top category (76% or 316), higher by 4%, and the pub/club/hotel/restaurant /take away category was second.

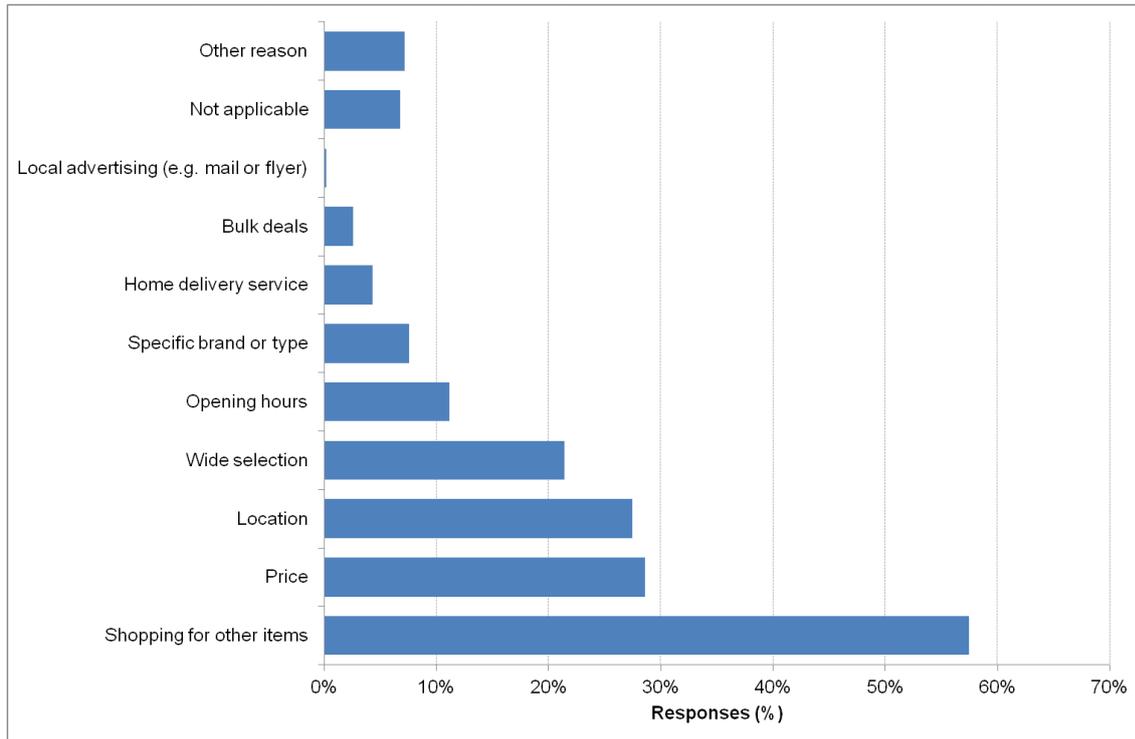
This information shows that members of the public continue to purchase alcohol from supermarkets as their preferred choice. This reflects the social trend of people purchasing more alcohol off sales than on sales. This ratio is currently 73% off sales and 27% on sales.

### Question 3: Why are you more likely to buy alcohol from there? (please tick all that apply)

Question 3 asked why the respondent was more likely to buy alcohol from the place of purchase. 4058 respondents answered this question and 57% (2531) selected the category 'whilst shopping for other items' 29% (1159) selected the category 'price' and 27% (1114) selected the category of 'location'.

This again is similar to social trends as most respondents chose to purchase alcohol whilst shopping for other items. 29% also said they were affected by price.

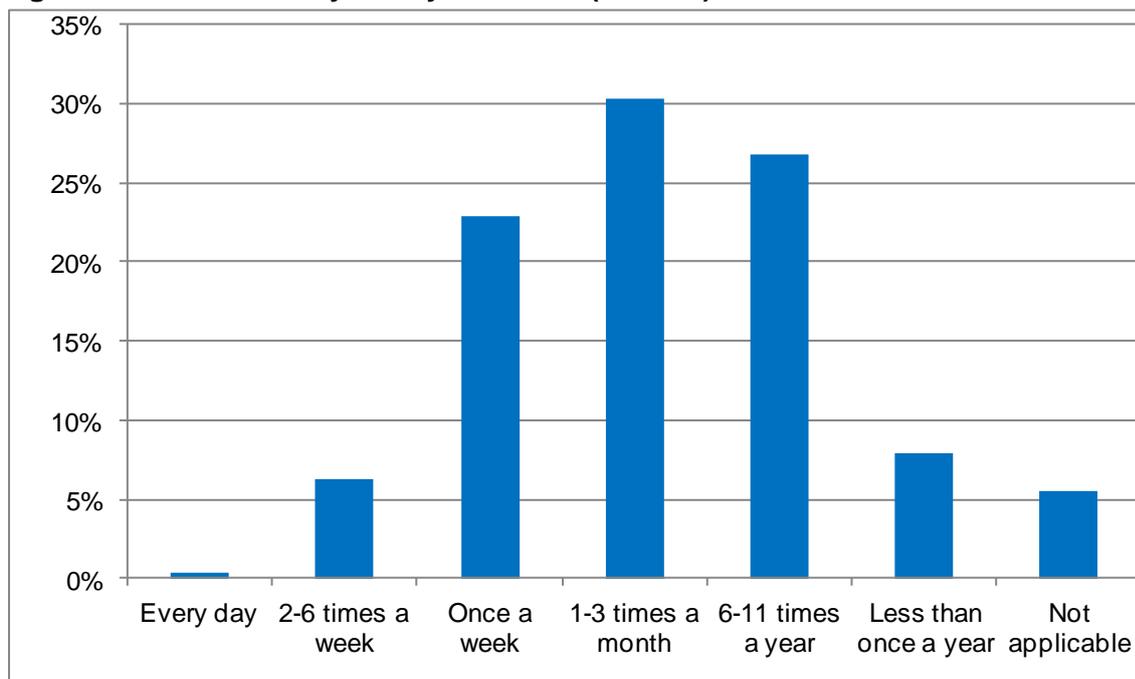
**Figure 6: Why are you more likely to buy alcohol from there? (N=4058)**



**Question 4: How often do you buy alcohol?**

The respondents were asked how often they purchased alcohol. There were 4055 members of the public who replied and 30% (1227) selected the category '1-3 times per month'. The second category selected was '6-11 times per month' 27% (1088) and the third category was 'once a week' 23% (928). This response does not take into account the volume of alcohol purchased.

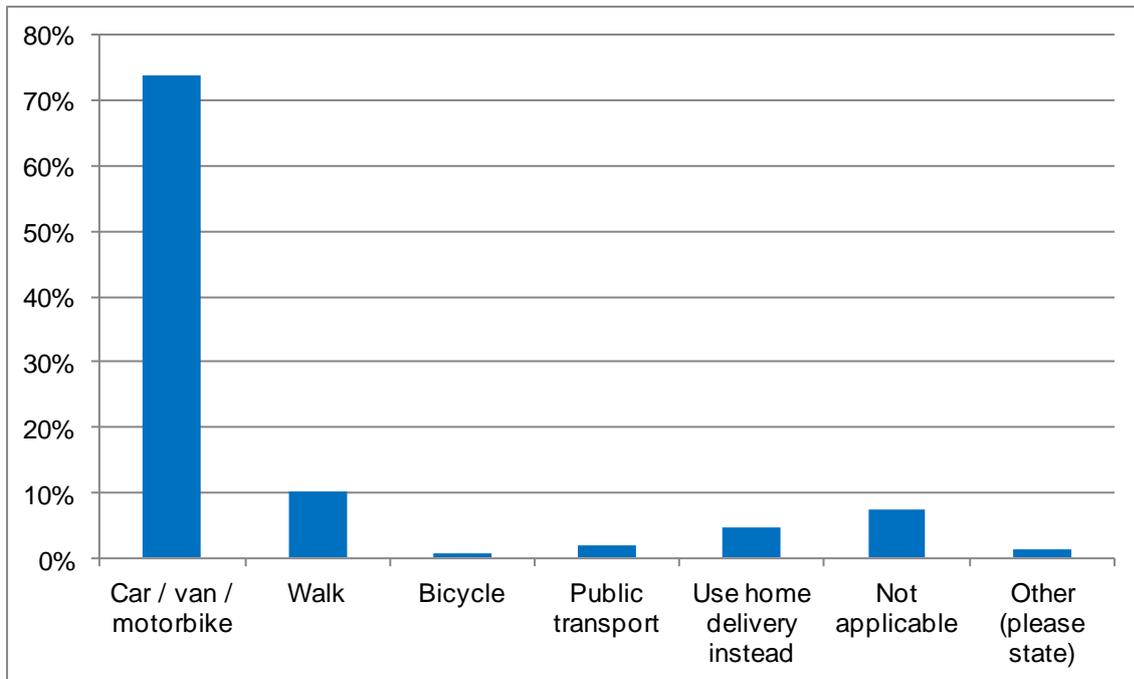
**Figure 7: How often do you buy alcohol? (N=4055)**



**Question 5: How do you usually travel to the place you buy alcohol most frequently? (tick one box only)**

Question five asked how the respondents travelled to the place where they purchased alcohol most frequently. 74% (2995) of the respondents travelled by car/van/motorbike to purchase alcohol and 10% (419) respondents were able to walk.

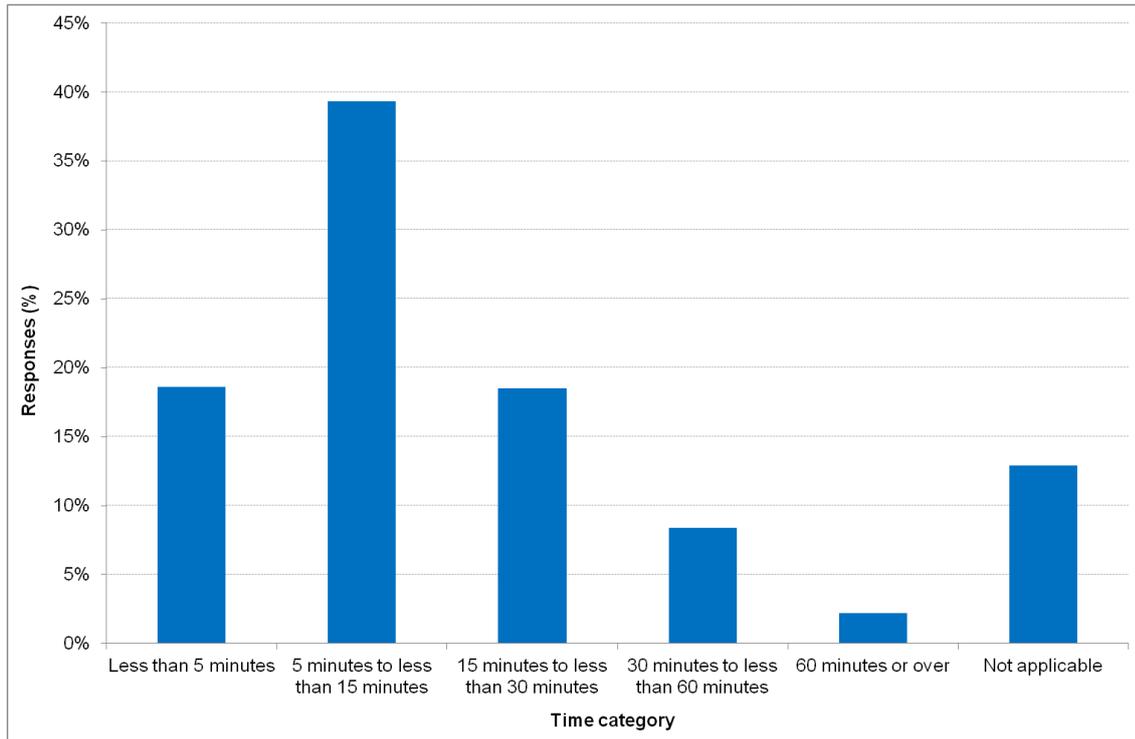
**Figure 8: How do you usually travel to the place you buy alcohol most frequently? (4062)**



**Q6: On average how long does it take to get there?**

This question asked about the time taken to reach the place where alcohol is purchased most frequently. This question does not distinguish between the different modes of travelling.

**Figure 9: Time taken to reach the place where alcohol is purchased most frequently**

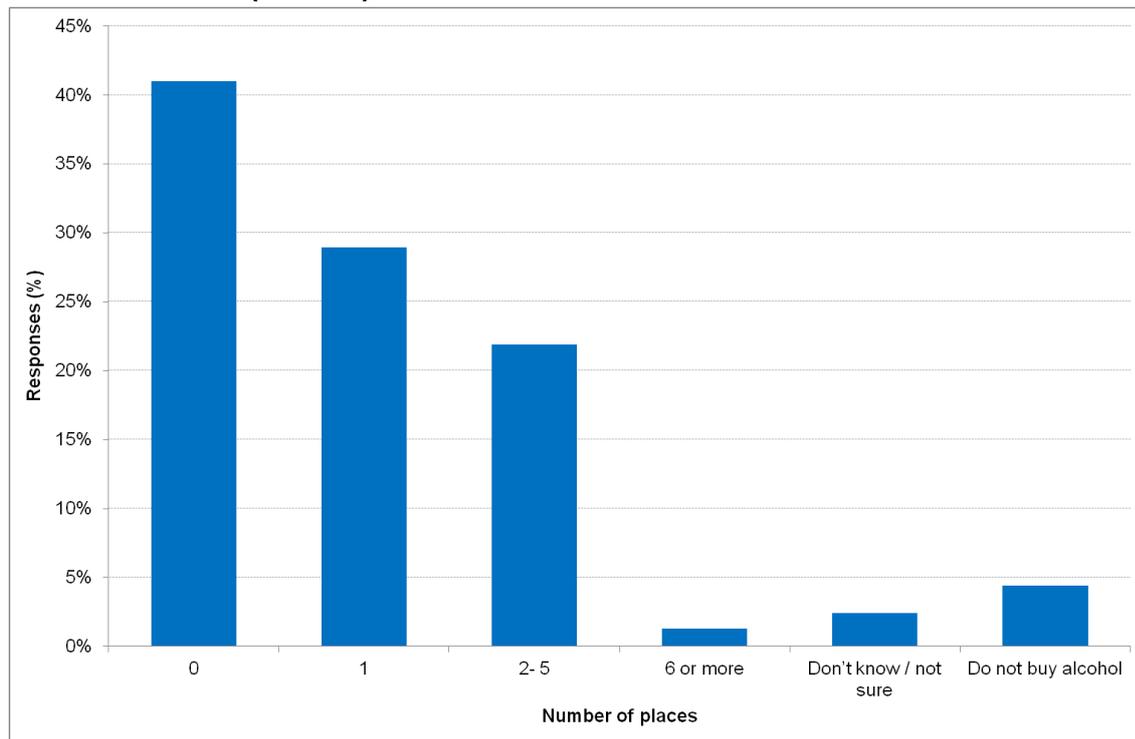


58% (2357) of respondents were able to travel for 15 minutes or less to the place they purchased alcohol most frequently. Increasing the travel time to 30 minutes or less 77% (3009) of respondents were able to travel to the place they purchased alcohol most frequently.

**Question 7: If you wanted to buy off-sales alcohol roughly how many places could you potentially make a purchase from within a 5 minute walk of your home.**

There were 3925 responses to this question about how many off-sales places there are within a five minute walk of the respondent's home. These results show that 52% (2048) respondents are able to purchase alcohol from between one to six places within a five minute walk from their home.

**Figure 10: Number of places where off-sales alcohol can be purchased within 5 minutes of home (N=3925)**

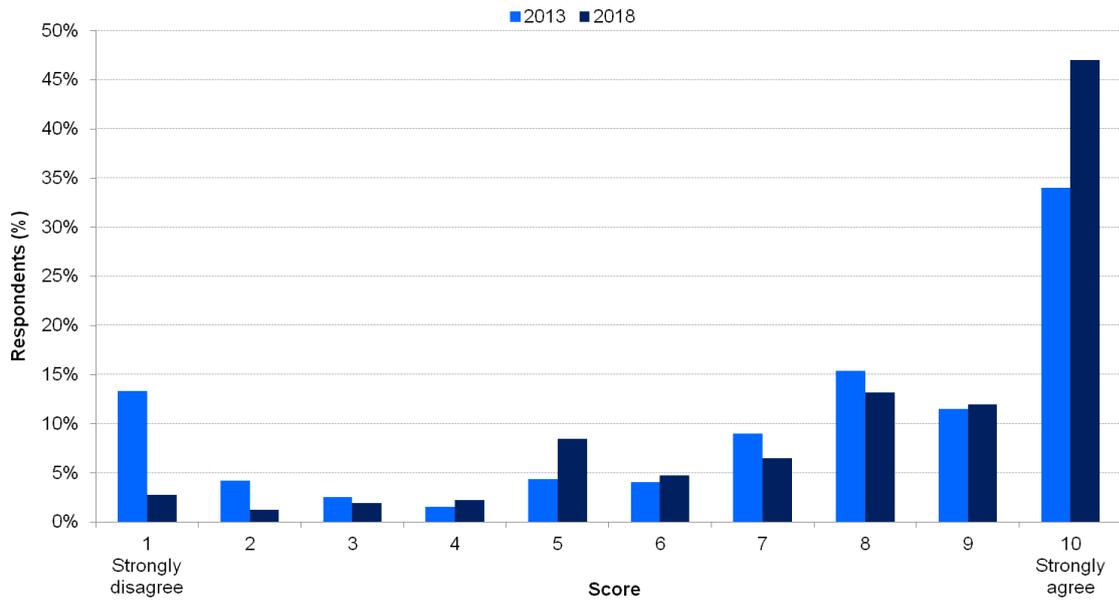


**Q8: There are enough places selling alcohol in the area where you live. Do you agree or disagree with this statement?**

Respondents were asked to score on a scale 1 to 10, with 1 being the lowest and 10 being the highest. In 2018 3803 respondents answered this question.

The public survey asked the question 'There are enough places selling alcohol in the area where you live. Do you agree or disagree with this statement'? In 2018 the majority (88%) of respondents agreed with this statement, which was significantly more than the 78% in 2013. When the highest three scores (8 to 10) are added together over two thirds of people (69%) in 2018 strongly agree that there are enough places selling alcohol in the area where they live. This is an increase in public opinion compared to 61% reported in 2013. Figure 11 also shows that when asked how strongly they agree almost half (45%) of respondents chose the strongest score of 10.

**Figure 11: There are enough places selling alcohol in the area where you live. Do you agree or disagree with this statement? (N=3803)**

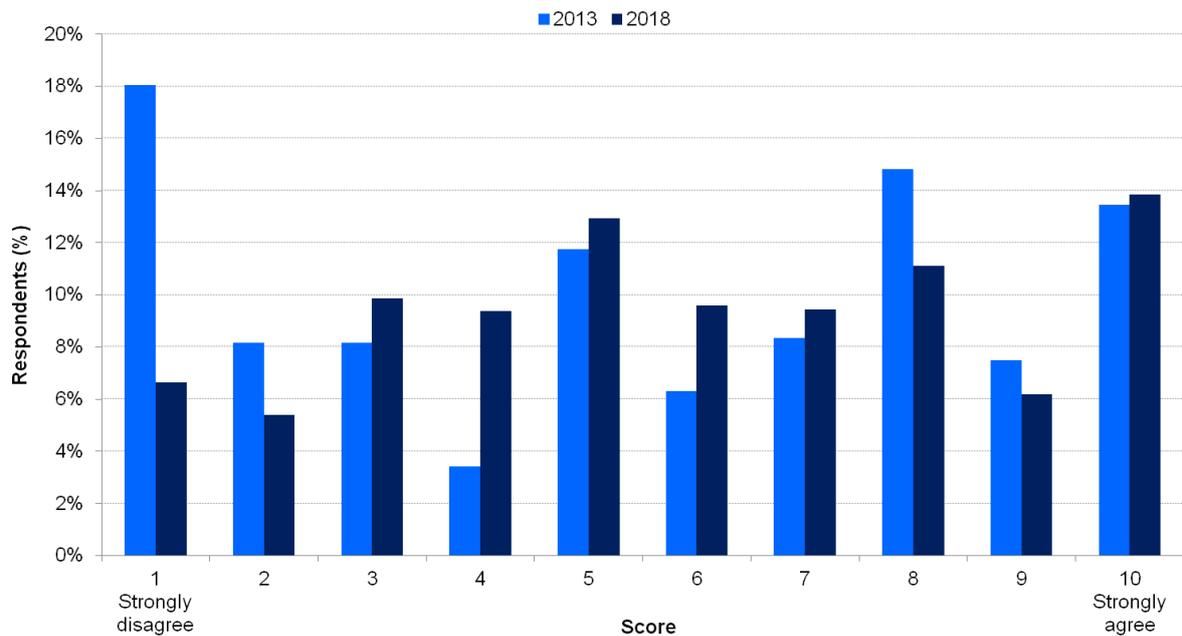


**Q9: When more alcohol is available people tend to drink more Do you agree or disagree with this statement?**

Respondents were asked to score on a scale 1 to 10, with 1 being the lowest and 10 being the highest. In 2018 3803 respondents answered this question.

When asked for their views on the statement ‘When alcohol is more available people tend to drink more’, 63% of respondents were in agreement with this statement in 2018. This is a similar level to the 62% reported in 2013. A third of people in 2018 (33%) strongly agreed that when more alcohol is available people will drink more compared to 36% in 2013. Figure 11 also shows a reduction in the proportion of respondents who strongly disagree with this statement, 7% in 2018 compared with 18% in 2013.

**Figure 12: When more alcohol is available people tend to drink more. Do you agree or disagree with this statement? (N=3743)**

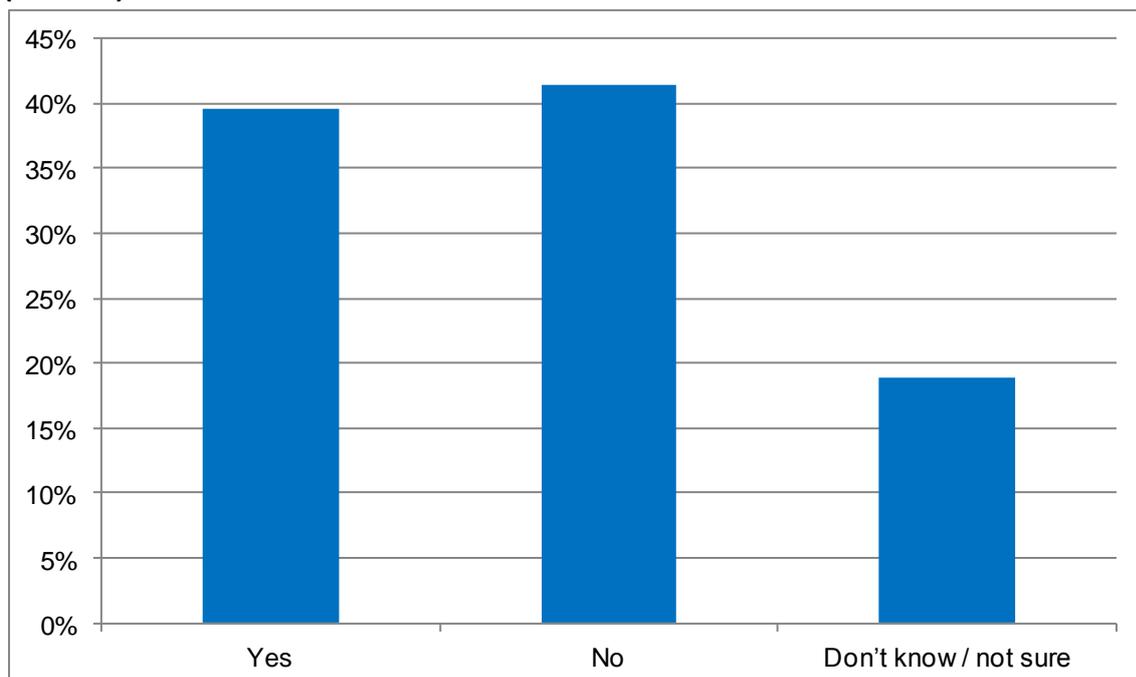


Data source(s): Directorate of Public Health, NHS Highland  
 Base: All respondents 2013 (587) and 2018 (3743). Disagree = score 1-4, Agree = score 5-10

**Q10: Do you think the range of premises selling alcohol should be restricted?**

There were 3921 responses to this question. 40% (1534) respondents selected the category 'the range of premises should be restricted' and slightly more at 41% (1627) disagreed. 19% (860) respondents selected the category of 'don't know'. This means that the respondent selection was fairly split between 'yes' and 'no'.

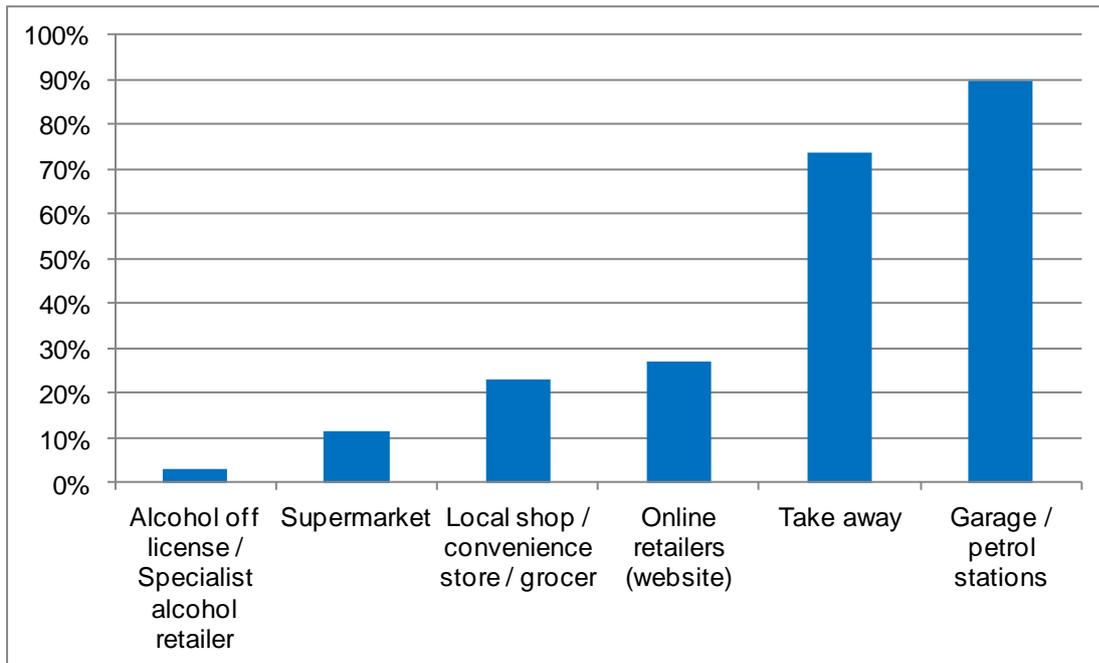
**Figure 13: Do you think the range of premises selling alcohol should be restricted (N=3921)**



**Q11: If you think the range of premises selling alcohol should be restricted, which of the following should NOT be permitted to sell alcohol?**

More than one category could be selected by respondents for this question. The category of 'garage/petrol station' was selected by 89% (2031) respondents followed by 'take away' by 74% (670) respondents. The category of specialist 'alcohol retailer' was selected by 3% (65) respondents. This means that the respondents selected the categories of 'not be permitted to sell alcohol' for premises that have a low turnover of volume of alcohol sold.

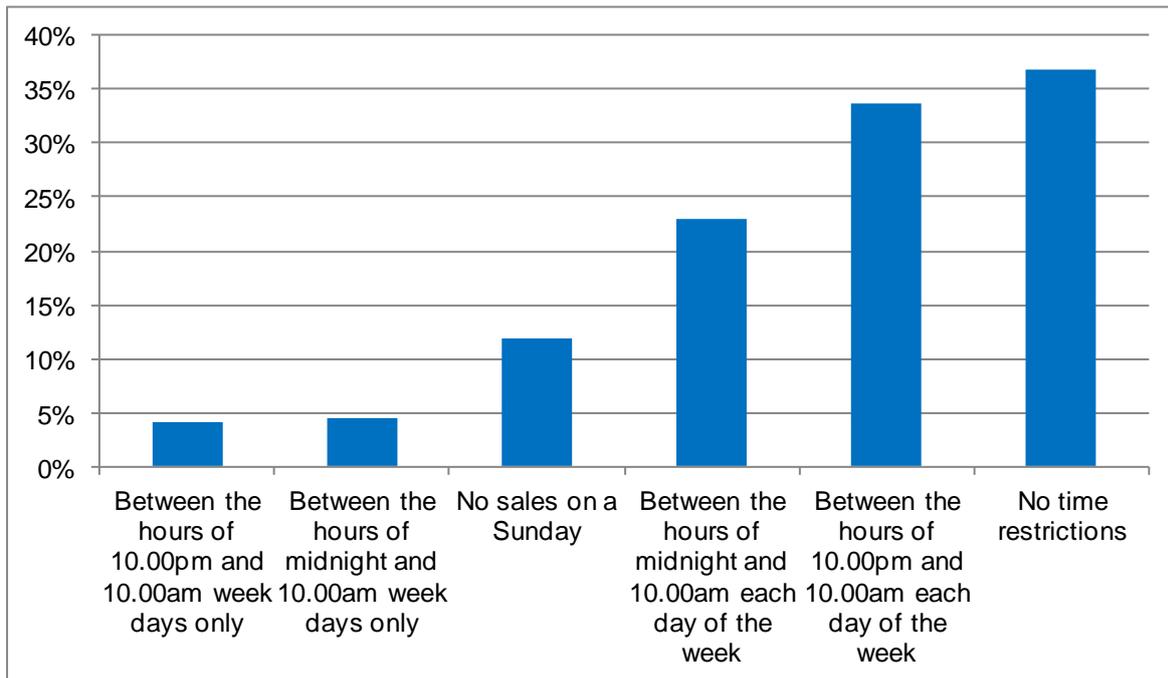
**Figure 14: Which premises should not be permitted to sell alcohol? (N=2270)**



**Q12: Do you think there should be time restrictions on the sale of alcohol?**

Respondents to this question were asked to tick all the categories that applied. 77% (2458) respondents selected categories agreeing with restrictions in the time of selling alcohol and 37% (1421) selected the category of 'no time restrictions'. The category that was selected the most for some type of time restriction was 'between the hours of 10.00pm and 10.00am each day of the week'. This means that these respondents were overall in agreement with some type of time restriction.

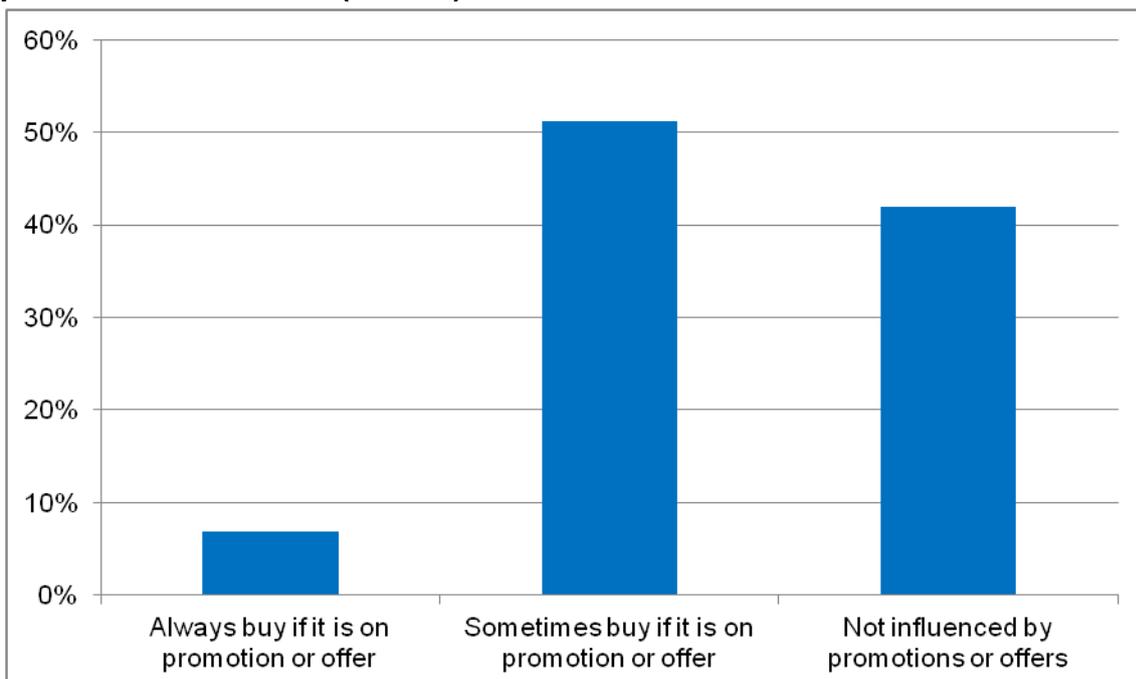
**Figure 15: Do you think there should be time restrictions on the sale of alcohol (3870)**



**Q13: Do you think the TYPE/BRAND of alcohol you buy is influenced by in-store alcohol promotions and offers?**

Members of the public were asked to think about the type and brand of alcohol they purchased and if this was influenced by alcohol promotions and offers. 51% (1975) of the public reported that they sometimes buy alcohol if it is on a promotion or offer whereas 42% (1621) of the public responded they were not influenced by a promotion or offer. 7% (263) of the public reported they always buy alcohol when it is on a promotion or offer.

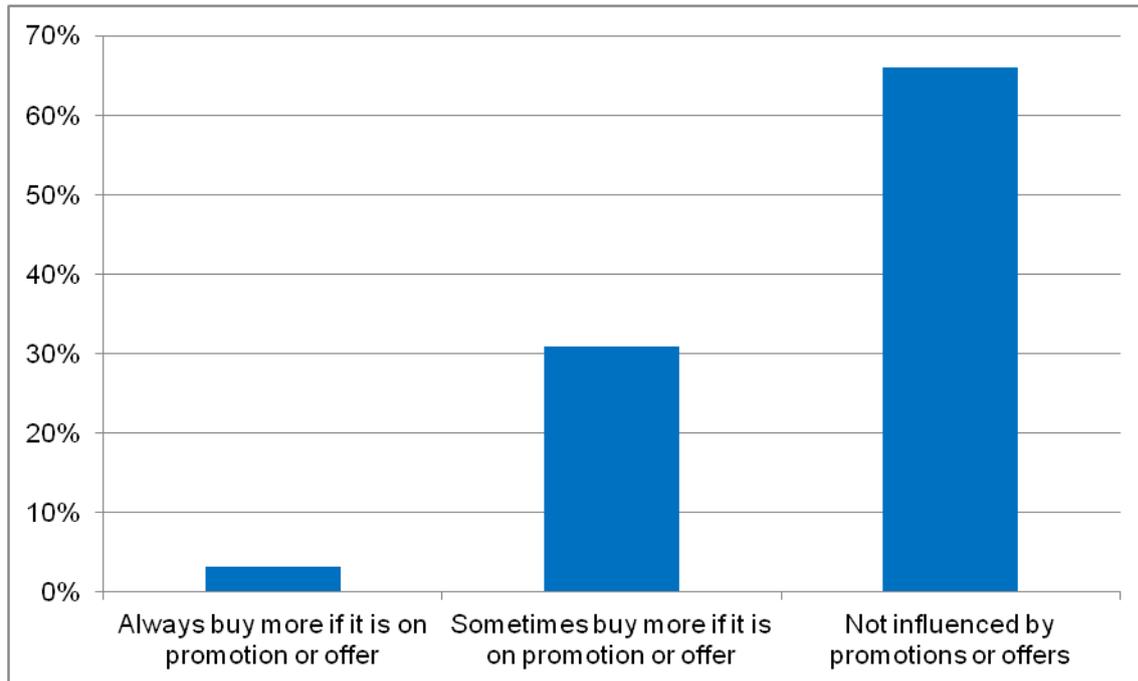
**Figure 16: Type/Brand of alcohol you buy is influenced by in-store alcohol promotions and offers? (N=3859)**



**Q14: Do you think the amount of alcohol you buy is influenced by in-store alcohol promotions and offers?**

Members of the public were asked to think about the amount of alcohol they purchased and if this is influenced by a promotion or offer. 66% (2549) of the public reported that the amount they purchased was not influenced by a promotion or offer. 31% (1191) of the public reported that the amount they purchased was sometimes by more. Only 3% (119) of the public reported they always buy more alcohol if on a promotion or offer.

**Figure 17: Amount of alcohol you buy is influenced by in-store alcohol promotions and offers (N=3895)**

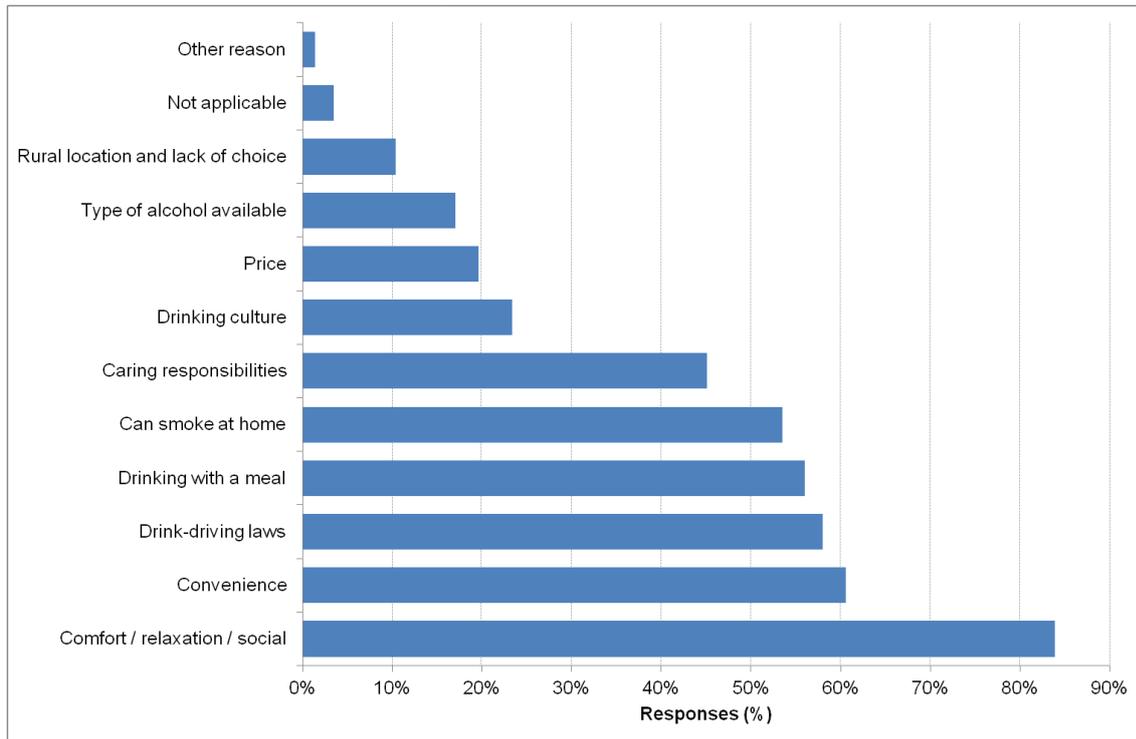


**Q15: What do you think are the main factors that influence people to drink alcohol in the home rather than at a licensed premise?**

The public could select more than one category to this question.

The main reason selected as one of the main factors that influence people to drink alcohol in the home is the category of 'comfort/ relaxation/ social' 84% (3237) with 'convenience' 61% (2337) second. 'Drink-driving laws' was the third category selected.

**Figure 18: The main factors that influence people to drink alcohol in the home rather than a license premise (N=3858).**

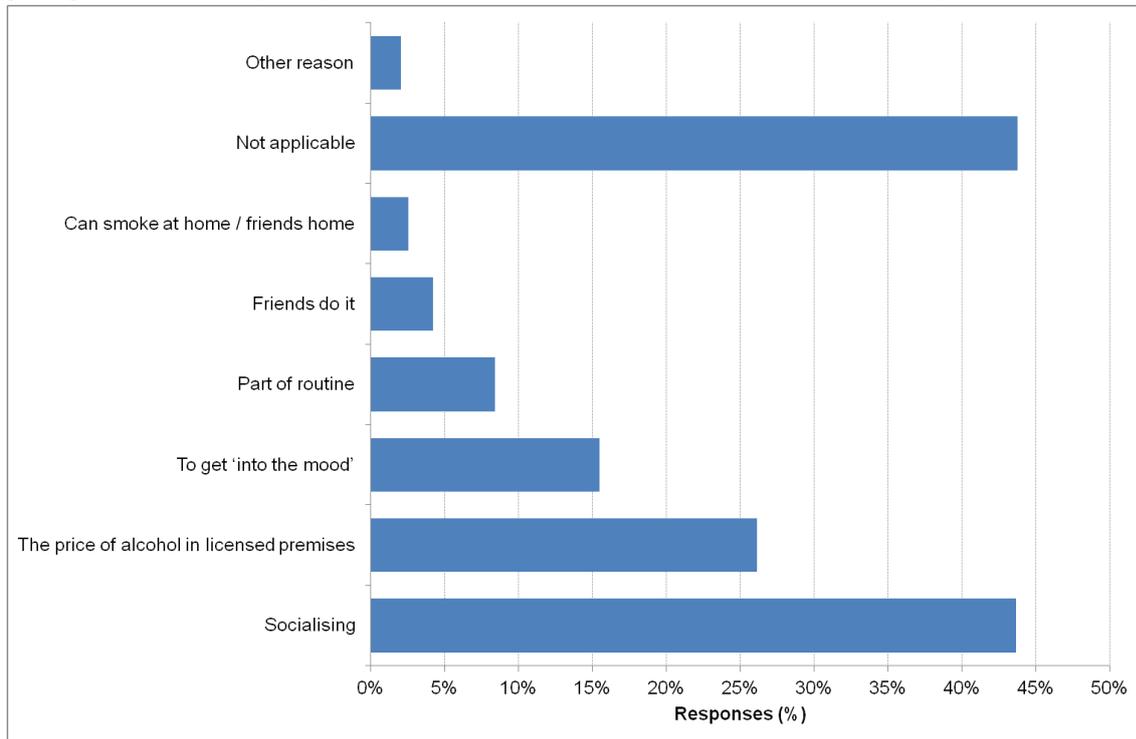


**Q16: If you have had a few drinks at home or at a friend’s house before going out to a pub, bar, restaurant or club over the last 12 month, what is the major reason that you do this?**

The public could select more than one category to this question.

The public were asked for the major reason why they would have a few drinks at home or a friend’s house before going to a pub, bar, restaurant or club over the last 12 months. ‘Socialising’ was the main category selected 43% (1675) followed by the ‘price of alcohol in a licensed premise’. The third category selected was ‘to get into the mood’ 15.5% (593).

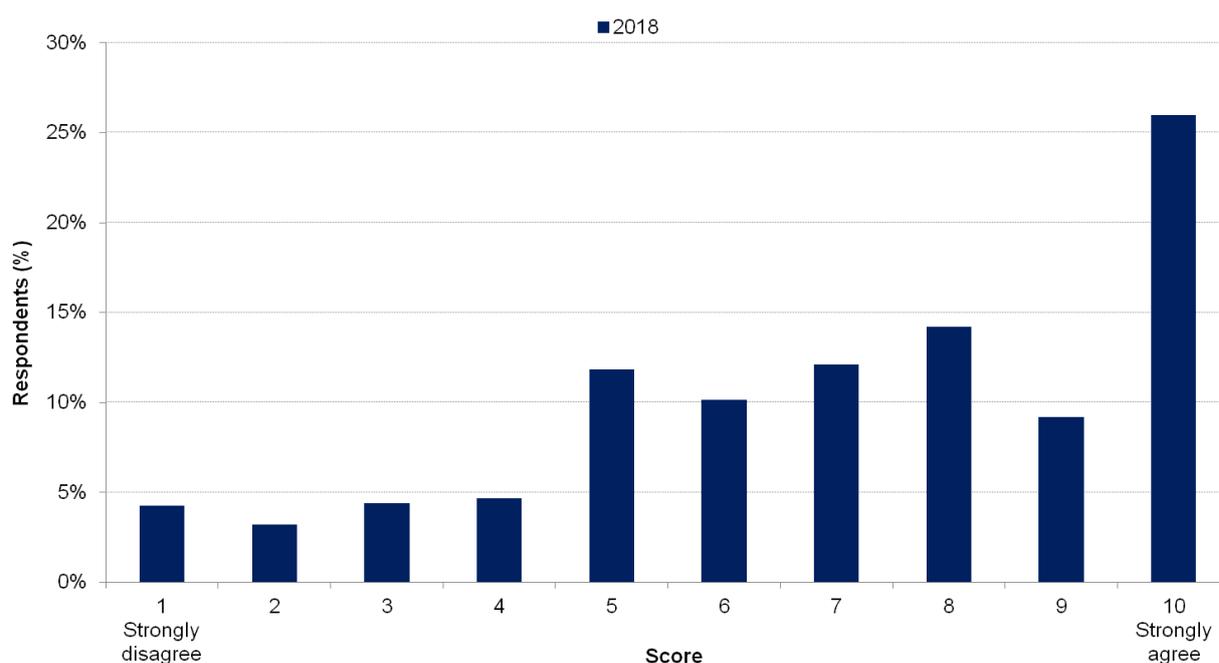
**Figure 19: Major reason for having a few drinks at home or at a friend's house before going out to a pub, bar, restaurant or club over the last 12 months (N=3837)**



**Q17: The availability of alcohol can have a harmful impact on family life. Do you agree or disagree with this statement?**

A question to ascertain the public's views on the impact of alcohol on family life was introduced in 2018. Figure 19 shows the majority (83% 1697) of people agreed with this statement. When the highest three scores (8 to 10) are added together half (49%) of survey respondents strongly agree that the availability of alcohol can have a harmful impact on family life. It is also of note that just over a quarter (26%) of people gave this statement the highest possible score (which is 10).

**Figure 20: Availability of alcohol can have a harmful impact on family life (N=3577)**



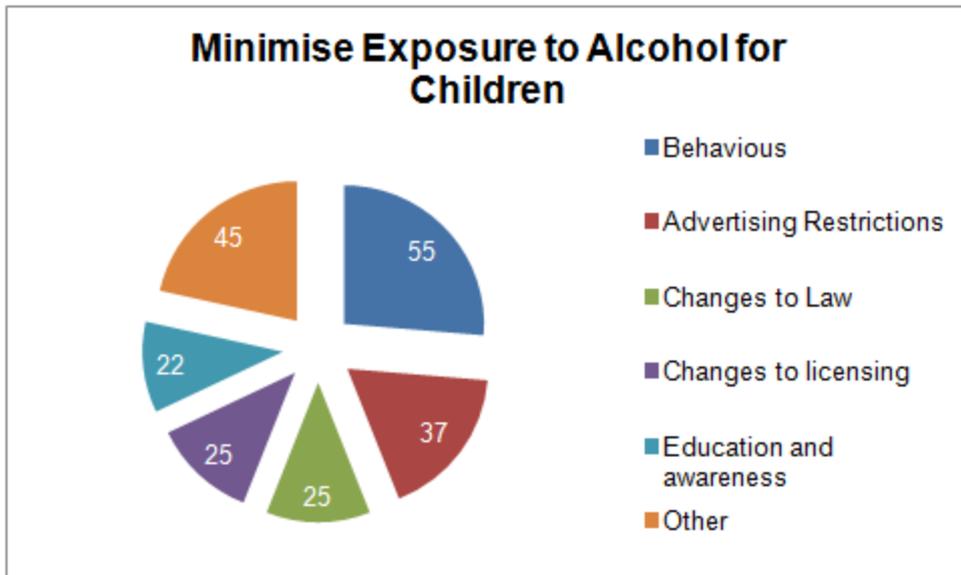
Data source(s): Directorate of Public Health and Health Policy, NHS Highland  
 Base: All respondents 2018 (3577). Disagree = score 1-4, Agree + score 5-10

**Q18: Is there anything you think that would minimise exposure to alcohol for children (less than 16 years of age) (N=4217).**

Of the 4217 respondents 1553 or 37% answered this question. Many views and opinions were expressed and due to time pressures ten percent was randomly selected and analysed for key themes and issues. There were thoughtful responses and many respondents gave multiple answers. The respondents have stated that in order to minimise exposure to alcohol for children they think:

- parenting skills and being a role model is important (55 or 26%)
- there should be further advertising restrictions relating to the TV or cinema (37 or 18%)
- there should be changes to the law such as prosecuting those who supply children with alcohol (25 or 12%)
- there should be changes to alcohol licensing such as limiting sales capacity (25 or 12%)
- education and awareness raising for both children and young people for example the harms alcohol can cause ( 22 or 11%)

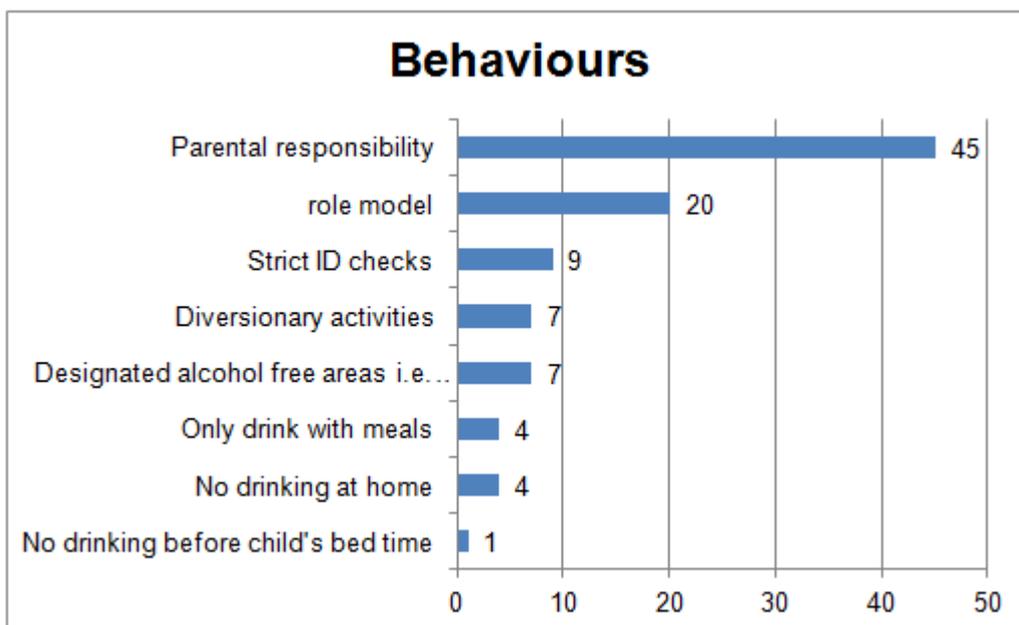
Other comments included links to tobacco control, impact on tourism both good and bad, more services to offer support for the whole family not just the person with an alcohol problem and there are lessons to be learnt from the European culture and attitude towards alcohol.



**Figure 21: Minimise Exposure to Alcohol for Children**

The top two themes (behaviours and advertising restrictions) were further analysed to find out the views of the respondents.

It is interesting that the top response to this sub category was about responsible parenting or parents being a role model (36 or 65%). No alcohol in the home environment and only drinking with meals were given as examples. Other respondents focused on the behaviours of those selling alcohol and suggested there should be stricter ID checks (5 or 9%), the need for diversionary activities (5 or 7%), no drinking in the home or only with meals (both at 4 or 7%) and no drinking before the child's bed time (1 or 1%).



**Figure 22: Behaviours that can affect children being exposed or not to alcohol**

The respondents identified a range of ‘advertising restrictions’ as a means of minimising exposure of alcohol to children, for example, banning alcohol advertising on TV, any form of media and the internet. A number of respondents also mentioned how alcohol is glamorised particularly on TV soaps and that this should be curtailed because it gives out the wrong message to children. Banning alcohol from all sports events was also mentioned.

Respondent quotes.

*the only safe way to minimise children's exposure to alcohol will be to ban children completely from all licensed establishments and to ban alcohol drinking at home when children are about*

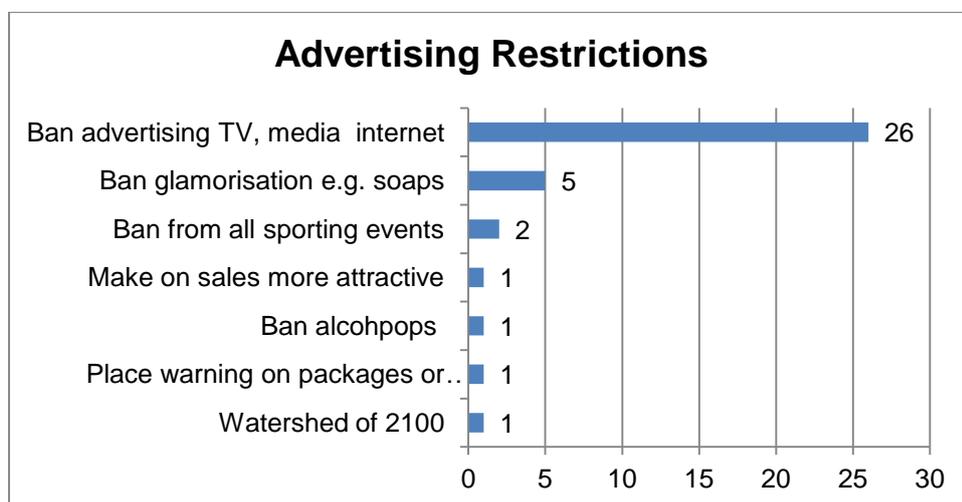
*Not having it in convince stores i.e RS Mcoll right next to sweets/snacks etc. Moving alcohol aisle in large shops make to the end the aisle instead of the one opposite entrance.*

*Not having them on point of sale on the end of aisles.*

*Having alcohol only section so unless over 18 you should not be in the aisle.*

*Also pubs actually ID'ing people many 16 year olds in Pubs.*

Under the theme of ‘Advertising Restrictions’ support was expressed for tighter regulation such as banning or restricting advertising in the cinema and television or internet (71 or 26%). A number of respondents mentioned the problem of the glamorisation of alcohol as portrayed on TV soaps saying this gives out the wrong message to children (15 or 5%). There was also support for sporting events to be alcohol free (2 or 5%).



**Figure 23: Advertising Restrictions**

Respondent quote:

*Stiff penalties for anyone selling drink to those underage. Stiff penalties for parents permitting underage drinking outside the home. Secret shoppers seeing where alcohol is being sold. Undercover HC at local halls and festivals where kids drinking is rife.*

The numbers who completed this section of the questionnaire clearly had something to say about protecting children. As expected the respondents gave a range of views and not always in agreement, however, there was a unifying desire to protect children from the harms of alcohol. A pragmatic approach to managing the volume of information contributed from members of the public was to sample the responses.

The importance of parenting and being a role model came out as the top issue followed by recognising the influence of advertising (i.e. through TV, the cinema and other forms of media). Some of the suggestions proposed about creating healthy public policy are out with the gift of the licensing board but many are not, for example, reducing overall capacity and restricting the sale of alcohol at sporting events or events targeted at children and families. The responses to this question show an appetite for changes to licensing in order to protect children and families.

### **3. Conclusion**

The information was collected to help the Licensing Board make a decision about agreeing a second alcohol overprovision statement for 2018 to 2023. These data are the views of over 4000 respondents.

The response, which was unprecedented, in our experience of Public Health surveys demonstrates the public were keen to engage in a conversation about alcohol availability. Figure 7 shows that we had responses from all 21 ward areas roughly representing population size. We are grateful to all those who took the time to respond.

The responses to the questions are in line with social trends such as:

- purchasing alcohol along with everyday items
- purchasing alcohol through off sales rather than on sales and drinking at home
- purchasing alcohol through home service

Furthermore, even in rural and remote parts of Scotland, the respondents reported that alcohol was readily available which was reported through the time it would take to reach a licensed premise and number of licensed premises within a 5 or 15 minute location of their home.

It is of note, however, that when asked about restricting the sales of alcohol, in general, supermarkets were not selected as often as the categories of 'garage/petrol stations' and 'take a-ways'. This suggests that there is dissonance between the action of purchasing alcohol, drinking in a home environment and where the problem might lie.

In 2018 we introduced questions about the impact of alcohol on families and how exposure to alcohol might be minimised. Many responses were thoughtful but polarised about how to manage exposure and ranged from the importance of parental behaviour such as being role models, for example, avoiding drinking when children are present and family/children events being alcohol free, to being of the opinion there is no need for any restrictions. These responses provide evidence that the introduction of restrictions particularly when children and families were involved should be debated.

This survey contributes to some of the evidence being presented to the Licensing Board. We hope it will be of value when considering the population of Highland's relationship with alcohol and to agree an alcohol overprovision statement that puts population health first.

#### 4. Appendix One: Survey of the Availability and Purchase of Alcohol

Question: What is your ward area (if known)?

Ward Area	Number	Percent
Ward 01 - North, West and Central Sutherland	100	3.6%
Ward 02 - Thurso & North West Caithness	91	3.3%
Ward 03 - Wick & East Caithness	139	5.1%
Ward 04 - East Sutherland and Edderton	96	3.5%
Ward 05 - Wester Ross, Strathpeffer, Lochalsh	152	5.5%
Ward 06 - Cromarty Firth	49	1.8%
Ward 07 - Tain and Easter Ross	112	4.1%
Ward 08 - Dingwall and Seaforth	143	5.2%
Ward 09 - Black Isle	161	5.9%
Ward 10 - Eilean a' Cheo	108	3.9%
Ward 11 - Caol and Mallaig	78	2.8%
Ward 12 - Aird and Loch Ness	114	4.1%
Ward 13 - Inverness West	190	6.9%
Ward 14 - Inverness Central	229	8.3%
Ward 15 - Inverness Ness-side	143	5.2%
Ward 16 - Inverness Milburn	97	3.5%
Ward 17 - Culloden and Ardersier	194	7.0%
Ward 18 - Nairn & Cawdor	124	4.5%
Ward 19 - Inverness South	136	4.9%
Ward 20 - Badenoch and Strathspey	145	5.3%
Ward 21 - Fort William and Ardnamurchan	153	5.6%
<b>Total</b>	<b>2754</b>	<b>65.3%</b>
No response	1463	34.7%
Expected	4217	100.0%

## 5. References

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<sup>i</sup> Highland Alcohol Overprovision Statement Consultation 2018 <http://www.highland-adp.org.uk/news/11-jul-2018-highland-licensing-board-consultation>

<sup>ii</sup> Aberdeen ADP and Aberdeen City Local Licensing Forum. Aberdeen City off sales consultation (2012) Contact the HADP, in the first instance, if more information is required