

Canadian Alcohol Policy Evaluation (CAPE) 3.0

Results from Manitoba

The Canadian Alcohol Policy Evaluation (CAPE) provides rigorous assessments of how well each level of government in Canada is implementing policies proven to reduce harm from alcohol use. This is the third edition of the CAPE project; a project which has a track record of strengthening Canada's response to alcohol harm. Policy data for CAPE 3.0 were collected between June 1 and December 1, 2022.

Why it Matters: Annual alcohol consumption, harms and costs in MB

Alcohol consumption, 2020/2021

MB: 469 standard drinks per person aged 15+

Canada: 487 standard drinks per person aged 15+

Source: Statistics Canada. Table 10-10-0010-01 Sales of alcoholic beverages types by liquor authorities and other retail outlets, by value, volume, and absolute volume.

Alcohol health harms, 2020

39,049 ER & hospital visits in MB

653 deaths in MB

Source: Canadian Substance Use Costs and Harms. www.csuch.ca

Alcohol deficit, 2020/2021

+ \$508M alcohol revenues

- \$807M alcohol harm costs

= -\$299M total alcohol deficit

Which is equal to -\$0.57 per standard drink sold.

Sources:

- Statistics Canada. Table 10-10-0010-01 Sales of alcoholic beverages types by liquor authorities and other retail outlets, by value, volume, and absolute volume.
- Canadian Substance Use Costs and Harms.
- Statistics Canada. Table 10-10-0012-01 Net income of liquor authorities and government revenue from sale of alcoholic beverages (x 1,000).

What can be done: an alcohol policy approach

Evidence-based alcohol policies are the most effective way to reduce harm from alcohol. The scores presented in this summary represent the degree to which best practice policies have been implemented.

CAPE 3.0 results: how does MB compare?

- BC: 36%
- AB: 34%
- SK: 36%
- MB: 44%
- ON: 40%
- QC: 42%
- NB: 35%
- NS: 38%
- PE: 37%
- NL: 41%
- YT: 33%
- NT: 32%
- NU: 34%

MB's CAPE Scores: What's Possible?

If Manitoba implemented all the best existing policies across Canada's provinces and territories, their score could change from 44% (F) to 80% (A-). If we graded MB against best existing policies across provinces and territories, their score would still only be 54% (D).

CAPE policy domains: do they all have the same impact?

The 11 policy domains in this assessment form part of a comprehensive and synergistic approach to preventing and reducing different types of alcohol harms. Policies examined fall under provincial or territorial control, and each domain reflects the current evidence and is weighted based on its effectiveness and scope of reach. This results in a ranked order from one (i.e., highest overall impact) through 11 (see next page). However, all the domains are necessary to create a health-focused alcohol policy environment. To read more, see Project Methodology.

What MB is doing well: Selected examples

Policy domain 1: Pricing & Taxation

While lower than recommended, MB has minimum pricing for all alcohol sold. For off-premise minimum pricing, MB is the only jurisdiction to set volumetric pricing on ethanol content (e.g. \$/L ethanol) across set container sizes. In general, prices for all beer and on-premise spirits are keeping pace with inflation.

Policy domain 2: Physical Availability

The population based off-premise outlet density in MB is near to recommended limits. MB has legislated powers to set limits on density and placement of off-premise specialty wine store outlets. Although on-premise alcohol takeout is allowed, there is a food component required that is set in regulation.

Policy domain 8: Liquor Law Enforcement

MB has risk-based licensing and enforcement for all premises that takes outlet and license holder characteristics into account when determining risk level. Penalties for liquor law violations are commensurate, escalating, and publicly tracked and reported. Alcohol sale and service training is mandatory for paid staff in all premises.

Where MB needs work: Selected examples

Policy domain 1. Pricing & Taxation

Level of minimum pricing is lower than recommended for all alcohol sold in MB and is not indexed to inflation; on-premise minimum pricing is not tied precisely (e.g. \$/L ethanol) to ethanol content. Alcohol is not taxed at a higher rate relative to other consumer goods.

MB Minimum Pricing in 2021/22

Note: Price per standard drink for a common container size and beverage strength, expressed in 2021 dollars.

Off-premise (e.g. liquor stores)

Recommended minimum price: \$1.83

Actual prices:

- Beer: \$1.44
- Wine: \$1.34
- Spirits: \$1.34
- Coolers: \$1.34

On-premise (e.g. restaurants, bars)

Recommended minimum price: \$3.66

Actual prices:

- Beer: \$2.25
- Wine: \$2.16
- Spirits: \$3.38
- Coolers: \$1.61

Policy domain 2: Physical Availability

There are no provincially legislated limits on outlet density set for any premises in MB. Hours of sale extend longer than recommended across all premises. MB alcohol home delivery, including by a third party (e.g. Uber Eats).

Policy domain 3: Control System

Only 12% of off-premise retail outlets in MB are government owned and run. There are no policies that prohibit online sales or alcohol sales alongside other goods and services such as in grocery stores or at spas.

Steps MB can take to improve their CAPE policy scores

The policy domains below are listed in order of impact based on their effectiveness and scope.

Note: Grade ranges: A+ = 90-100%; A = 85-89%; A- = 80-84%; B+ = 77-79%; B = 73-76%; B- = 70-72%; C+ = 67-69%; C = 63-66%; C- = 60-62%; D+ = 57-59%; D = 53-56%; D- = 50-52%; F = 0-49%.

MB's CAPE 3.0 Score: 44% (F)

Policy domain 1: Pricing & Taxation

Score: 45% (F)

Recommendations

All recommended policies should be developed and implemented without alcohol industry involvement, without incorporating exceptions, and enacted in legislation or regulation where possible.

- Increase legislated minimum prices to a rate per standard drink (e.g. 17.05mL ethanol) of at least \$2.04* for alcohol sold at off-premise retail outlets and \$4.07* for alcohol sold at on-premise establishments, after taxes, and implement automatic indexation (*2023 price); tie on-premise minimum prices for all alcohol precisely to ethanol content (e.g. \$/L ethanol).
- Update general alcohol prices annually to ensure that all keep pace with MB-specific inflation, increase alcohol sales taxes, and tax alcohol at a higher rate than other consumer goods.
- Set off-premise minimum retail markups to be at least 100% of the landed cost for each beverage type and set on-premise markups at or above the off-premise retail price.

Policy domain 2: Physical Availability

Score: 40% (F)

Recommendations

All recommended policies should be developed and implemented without alcohol industry involvement, without incorporating exceptions, and enacted in legislation or regulation where possible.

- Reduce existing outlet density of all premises. Introduce density limits for all premises, not just off-premise wine stores, and introduce placement limits for on-premise establishments.
- Reduce and legislate maximum trading hours allowed per week; restrict alcohol sales before 11:00am and after 8pm (off-premise retail outlets) and 1am (on-premise establishments). Prohibit on-premise alcohol takeout. Prohibit alcohol home delivery, including by a third party, from all premises.

Policy domain 3: Control System

Score: 30% (F)

Recommendations

All recommended policies should be developed and implemented without alcohol industry involvement, without incorporating exceptions, and enacted in legislation or regulation where possible.

- Appoint a health and/or safety-focused ministry to oversee alcohol distribution and retail. Require a government wholesaler or equivalent fee between the producer/manufacturer and retailer.
- Increase the current 11.7% proportion of government-owned and operated off-premise retail outlets and move towards a full government monopoly. Prohibit alcohol sales beyond traditional channels such as in convenience and grocery stores, in other establishments such as spas and sporting facilities, and via online sales; phase out ferment-on-premise outlets and home-brew kits.
- Include protection of public health and safety as explicit mandate objectives for regulator and require public health involvement in decision-making and legislative changes.

Policy domain 4: Impaired Driving Countermeasures

Score: 56% (D)

Recommendations

All recommended policies should be developed and implemented without alcohol industry involvement, without incorporating exceptions, and enacted in legislation or regulation where possible.

- Implement graduated licensing program (GLP) with minimum start age of 16, set stage 1 minimum of 12 months and stage 2 minimum of 24 months; implement stage 2 night-time driving ban and passenger limit. Set penalties for all GLP and new drivers with less than 5 years' experience who violate prohibition on testing positive for alcohol.
- Impose increased penalties when presence of alcohol plus another drug is detected.
- Impose comprehensive mandatory ALS and AVI that escalate according to BAC level.
- Require escalating interlock periods for repeat $\geq 0.08\%$ BAC federal convictions; have interlock program enrollment incentives to discourage unlicensed/uninsured driving

Policy domain 5: Marketing & Advertising Controls

Score: 50% (D-)

Recommendations

All recommended policies should be developed and implemented without alcohol industry involvement, without incorporating exceptions, and enacted in legislation or regulation where possible.

- Implement restrictions on advertising quantity (e.g. ad bans and volume restrictions), and price-based promotions/sponsorships for all advertisers (e.g. government retailers, non-licensees/third parties) and all media types.
- Appoint independent health-focused enforcement authority to conduct mandatory pre-screening of all alcohol ads. Set commensurate, escalating penalties for any violations.

Policy domain 6: Minimum Legal Age

Score: 0% (F)

Recommendations

All recommended policies should be developed and implemented without alcohol industry involvement, without incorporating exceptions, and enacted in legislation or regulation where possible.

- Increase minimum legal age to 21 for possession and purchase of alcohol, or at least 19 to be in line with other Canadian jurisdictions; consider granting graduated access (i.e. restrictions based on alcohol strength or hours of sale).
- Prohibit policies permitting parents/guardians or other adults from providing alcohol to minors beyond the home.
- Require proof of age identification for anyone purchasing alcohol and 2-staged verification (i.e. when ordering and receiving orders) for alcohol sales made remotely (e.g. online, via phone, etc.).

Policy domain 7: Health & Safety Messaging

Score: 7% (F)

Recommendations

All recommended policies should be developed and implemented without alcohol industry involvement, without incorporating exceptions, and enacted in legislation or regulation where possible.

- Implement enhanced alcohol labelling as a manufacturer requirement and mandatory onsite health and safety messaging (e.g. signage, posters) in all premises. Labels, signage, and messaging should include a variety of evidence-based warning messages (e.g. cancer risk, standard drinks, national alcohol guidance, calories), be prominently displayed and accompanied by pictorials, rotate across all products, and support consumers in making informed decisions about product use.
- Deliver a variety of ministry-led alcohol health and safety campaigns (beyond holiday themes) at least annually.

Policy domain 8: Liquor Law Enforcement

Score: 92% (A+)

Recommendations

All recommended policies should be developed and implemented without alcohol industry involvement, without incorporating exceptions, and enacted in legislation or regulation where possible.

- Strengthen existing risk-based licensing and enforcement by extending it to include to special occasion permits; strengthen follow-up for failed compliance across all premises within 3 months and based on severity or number of violations.
- Introduce dedicated police inspection program for on-premise establishments.
- Strengthen the existing alcohol sale and service training program by extending it to include volunteers and requiring recertification at least every 2 years.

Policy domain 9: Screening and Treatment Interventions

Note: Treatment indicators measure existence of services only, not quantity or quality.

Score: 82% (A-)

Recommendations:

All recommended policies should be developed and implemented without alcohol industry involvement, without incorporating exceptions, and enacted in legislation or regulation where possible.

- Formally adopt the most recent evidence-based national alcohol guidance with an official statement of support.
- Develop and/or host online self-guided SBIR resources.
- Provide publicly funded permanent managed alcohol programs.

Policy domain 10: Alcohol Strategy

Score: 45% (F)

Recommendations

All recommended policies should be developed and implemented without alcohol industry involvement, without incorporating exceptions, and enacted in legislation or regulation where possible.

- Implement a standalone government-endorsed alcohol strategy that includes a wide range of evidence-based public health policies (such as pricing and physical availability) and is developed independently of the alcohol industry; allocate dedicated government funding to the strategy.

Policy domain 11: Monitoring & Reporting

Score: 53% (D)

Recommendations

All recommended policies should be developed and implemented without alcohol industry involvement, without incorporating exceptions, and enacted in legislation or regulation where possible.

- Implement systematic and comprehensive tracking of all alcohol-related indicators (e.g. add drinking patterns and policy changes to existing indicators).
- Report annually on all indicators through centralized public database or reporting system (i.e., website), with leadership from government knowledge broker and tailored knowledge products or activities at least every 2 years.

More CAPE products:

Provincial/Territorial

- Other P/T Results Summaries
- Policy Domain Results Summary
- Policy Scoring Rubric
- Methodology and Evidence
- Best Practice Policy Leaders

Federal

- Federal Results Summary
- Policy Domain Results
- Policy Scoring Rubric
- Methodology and Evidence
- Evidence-Based Recommendations for Labelling of Alcohol Products in Canada

To learn more about the Canadian Alcohol Policy Evaluation or to join our Community of Practice, visit alcoholpolicy.cisur.ca or email cisur@uvic.ca

Suggested citation

Naimi, T., Stockwell, T., Giesbrecht, N., Wettlaufer, A., Vallance, K., Farrell-Low, A., Farkouh, E., Ma, J., Priore, B., Vishnevsky, N., Price, T., Asbridge, M., Gagnon, M., Hynes, G., Shelley, J., Sherk, A., Shield, K., Solomon, R., Thomas, G. & Thompson, K. (2023). Canadian Alcohol Policy Evaluation 3.0: Findings from Manitoba. Victoria, BC: Canadian Institute for Substance Use Research, University of Victoria.

Acknowledgments

Thank you to all federal, provincial and territorial stakeholders who provided valuable feedback for this project as well as assisting with data collection and validation activities. Thanks also to our three external expert reviewers, all the extended members of the project team, and our CAPE Community of Practice.

Funding

This project was funded primarily by Health Canada's Substance Use and Addictions Program. Additional funds were provided by the Public Health Agency of Canada and the Social Sciences and Humanities Research Council. The views expressed herein do not necessarily represent the views of Health Canada or the other organizations acknowledged.