



TO Interested Parties

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RE: Americans' Views of Alcohol Regulation

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New Bridge Strategy completed a survey of Americans age 21 and older in March 2021 regarding their views of alcohol regulation in their state.¹ The survey was the latest look at core attitudes on a number of facets of alcohol regulation which have been tracked going back to 2008. We continue to find significant and bipartisan support for state regulation of the alcohol industry, as American adults continue to be satisfied with alcohol regulations in their state. Once introduced to the three-tier system, they say it is working well. American adults want alcohol laws to prioritize public safety over all other aspects and prefer states evaluate the impacts of changes in alcohol regulations that occurred during the pandemic before making any changes permanent.

The specific key findings include:

- **There is solid support across party lines for state regulation of alcohol.** Fully 83 percent of Americans indicate support for individual states setting “their own laws and regulations surrounding the sale of alcohol, meaning beer, wine and liquor.” Thirty-nine percent strongly support this, while only 17 percent oppose the idea. These results are within one point of the data from 2019 (pre-pandemic) and are incredibly consistent with past data going back to 2008.

While government regulation of any kind is often viewed through a partisan lens, we do not see this when it comes to state regulation of alcohol. Support bridges the partisan gap with fully 88 percent of Republicans, 80 percent of Democrats, and 82 percent of independents expressing support for state regulation. Moreover, support for state regulation is strong across the country and with all demographic sub-groups.

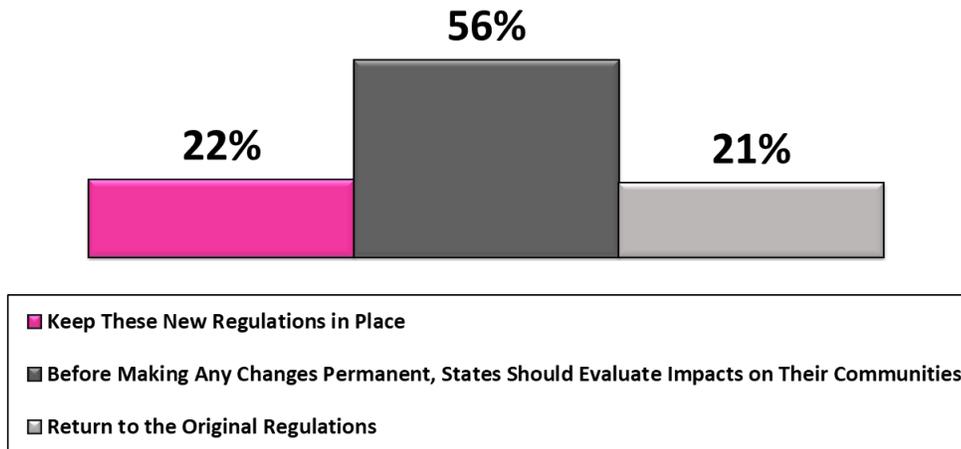
¹ **Methodology:** From March 3-9, 2021, New Bridge Strategy completed 1002 online interviews with adults age 21 and older throughout the United States. Interviews were drawn from online panels, and the sample was drawn proportionally throughout the country and is demographically representative of the adult population in this age group. The confidence interval associated with this sample is +/-3.5% at the 95% confidence level; with varying confidence for population subgroups within the sample (although they will be higher). Due to rounding, not all totals will sum to 100%.

- **In part, this is due to the fact that alcohol is viewed as a unique product that requires oversight.** Fully 87 percent of respondents say that “it is very important to keep the alcohol industry regulated.” Agreement with this sentiment has been within margin of error of this result for nearly a decade going back to 2012 when 88 percent said the same.

The view that “since alcohol is different than other consumer products, it needs a different set of rules, and the state should be regulating it” is also widely held (79 percent agree). Again, the response in 2021 is within margin of error of agreement levels two years ago.

- **More broadly, Americans are satisfied with current alcohol regulations in the state.** In multiple questions throughout the survey, Americans express clear and overwhelming satisfaction with how alcohol is handled in their state, including...
 - 85 percent say they are very (38 percent) or somewhat (46 percent) satisfied with the “existing system for purchasing alcohol” in their state. Only 16 percent register dissatisfaction. Satisfaction has inched up over the last four years, increasing from 81 percent who express satisfaction in 2017.
 - Only 12 percent view current alcohol regulations in their state as “too restrictive,” while the vast majority say they are “about right” (71 percent) or too lenient (8 percent). Another one-in-ten say they do not know enough to register an opinion. The percentage saying that current alcohol regulations are “about right” is up significantly from two years ago, increasing seven points from 64 percent in 2019.
 - Nearly nine-of-ten are satisfied with the variety of alcohol products available in their community (88 percent) with almost half (48 percent) saying they are “very” satisfied. This is essentially unchanged from the responses in 2019 and 2017 (88 and 87 percent satisfied, respectively).
 - Satisfaction is also high with the number of places alcohol can be purchased. Today, three-quarters (76 percent) say the number of places where alcohol can be purchased in their community is “about right,” while 16 percent feel there are too many. Only 8 percent say there are not enough. There has not been a dramatic change in perceptions of alcohol outlets, instead the view that the number is about right has gradually increased from 68 percent in 2017 to 70 percent in 2019 and now standing at 76 percent.
 - These views tend to be widely held across regions of the country, demographic sub-groups and across party lines, which is rare on many other topics.
- **Americans advocate for going slow on making permanent any changes in alcohol regulations undertaken during the pandemic.** We told respondents that “due to the pandemic, some states have loosened alcohol regulations to allow more delivery or alcohol beverages to-go by restaurants, brewpubs and other businesses” and then asked them about how we should handle these changes “as the nation recovers from the pandemic.” As the following chart illustrates, a solid majority prefer that states evaluate the impacts before making these laws permanent. The remainder are evenly divided between reverting back to original regulations or keeping the new looser regulations in place.

Views of Changes Made During the Pandemic



- **Americans want alcohol laws to prioritize safety.** In a number of key questions in the survey, the public expresses that alcohol-related problems are serious concerns and that health and safety should be at the forefront when lawmakers consider alcohol regulations.
 - Overall, nearly two-thirds of American adults say that “more needs to be done to reduce the potential harm caused by alcohol,” (64 percent) while 36 percent believe that enough is being done. A majority of every single sub-group we examined says they believe that more needs to be done.
 - Driving “under the influence of alcohol” is seen as the most serious problem we tested with nine-in-ten (90 percent) characterizing it as an extremely or very serious problem facing our country. It eclipses driving under the influence of drugs (84 percent), which ranked as the second greatest problem.
 - “High risk drinking” which we defined as “regularly drinking beyond commonly accepted levels” is viewed as an extremely or very serious problem by three-quarters (75 percent) of Americans.
 - “Underage drinking by high school aged youth” is also deemed an extremely or very serious problem by nearly three-quarters of Americans (74 percent). Notably, parents are even more concerned than those without children at home (80 percent and 70 percent extremely or very serious problem, respectively).
 - When asked what are the most important factors that lawmakers should consider when contemplating changes, the public overwhelmingly backs health and safety considerations. As the following graph illustrates, Americans say lawmakers should prioritize “reducing drunk driving” (74 rate it high in importance on a scale where 10 is very important, 0 is not at all important and 5 is a neutral rating), protecting health and public safety” (67 percent) and

“reducing underage drinking” (61 percent) over all other factors. Conversely, the factors which are least apt to be seen as very important for lawmakers to consider are “allowing more business to produce and sell alcoholic products” (26 percent) and “lowering prices” (23 percent).

Importance of Certain Factors Lawmakers Should Consider in Crafting Alcohol Regulations

	% 8-10	Mean Score
<i>Reducing drunk driving</i>	74%	8.1
<i>Protecting health and public safety</i>	67%	7.8
<i>Reducing underage drinking</i>	61%	7.4
<i>Increasing economic development</i>	44%	6.6
<i>Allowing more businesses to produce and sell alcoholic products</i>	26%	5.4
<i>Lowering prices for alcohol</i>	23%	4.9

- Americans do differentiate between products when it comes to regulations as well, and ensuring that safety is protected. More than two-thirds (68 percent) say that “the higher alcohol content of liquor poses a greater health risk than beer or wine.” Even a majority (59 percent) of those who purchased liquor in the last year agree with this view.

Nearly the same proportion (63 percent) agree that “alcohol products with higher alcohol content levels should be more strictly controlled than lower alcohol content products.” This has been an extraordinarily consistent view of Americans going back to 2012 when 64 percent said the same. And again, even a majority of those who purchased liquor in the last year feel it should be more strictly controlled than other alcohol products (53 percent agree).

- **More broadly, the three-tier system is viewed as working well by Americans.** Given that most adults are not completely familiar with the American three-tier system of state-based alcohol regulation, we provided a brief neutral explanation of it as follows: “As you may know, most states in the U.S. have regulations requiring that producers of alcohol sell their products to licensed local independent distributors, who then sell the alcohol to individual retailers such as bars, grocery, liquor, and packaged goods stores.” Fully four-in-five (80 percent) say that they view this system as “working well,” with only one-in-five (20 percent) saying that the system does not work well. An equally robust number of Americans (83 percent) support individual states regulating alcohol sales under this system, the highest proportion recorded in this survey going back to 2008.

Again, support is evident across party lines, with 86 percent of Republicans, 83 percent of independents and 81 percent of Democrats supporting states regulating alcohol through this three-tier system.