

# Zoomin Media Project

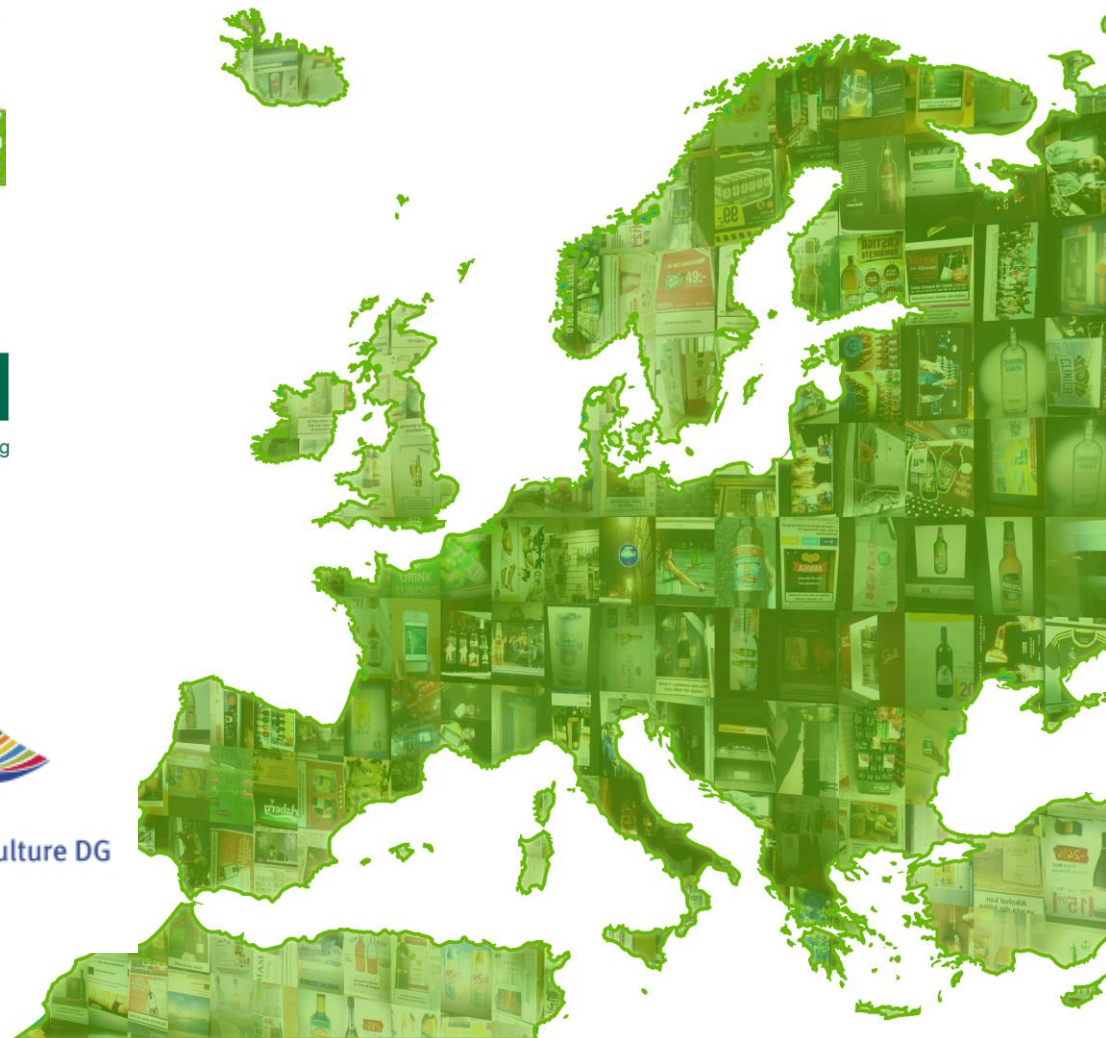
Report of Monitoring Alcohol Marketing

by young people in Estonia, Latvia, Romania,  
Sweden, Poland and Ukraine



Education and Culture DG

Culture Programme



# **Zoomin Media Project**

*Report of Monitoring Alcohol Marketing by young people in Estonia, Latvia, Romania, Sweden, Poland and Ukraine*

Authors: Gerard van der Waal, Fieke Franken & Wim van Dalen

September 2016

## **Content**

|   |           |
|---|-----------|
| <b>1. Introduction</b>                            | <b>3</b>  |
| 1.1 Zoom in Media                                 |           |
| 1.2 School children and their alcohol use         |           |
| <b>2. Alcohol marketing regulations</b>           | <b>5</b>  |
| 2.1 Estonia                                       |           |
| 2.2 Latvia  |           |
| 2.3 Romania                                       |           |
| 2.4 Sweden  |           |
| 2.5 Poland  |           |
| 2.6 Ukraine                                       |           |
| <b>3. Method</b>                                  | <b>9</b>  |
| 3.1 Application                                   |           |
| 3.2 Respondents                                   |           |
| <b>4. Country findings</b>                        | <b>10</b> |
| 4.1 Attitudes towards advertising                 |           |
| 4.2 Alcohol marketing reported exposure           |           |
| 4.3 Alcohol marketing alcohol marketing monitored |           |
| <b>5. Conclusions</b>                             | <b>21</b> |
| 5.1 Sum-up  |           |
| 5.2 Limitations                                   |           |



## 1. Introduction

### 1.1 Zoom in Media

Zoom in Media is a two year research project being implemented by ACTIVE – Sobriety, Friendship & Peace in Estonia, Latvia, Romania, Sweden, Poland and Ukraine with support of the European Centre for Monitoring Alcohol Marketing (EUCAM).

The purpose of the Zoom in Media project was to explore the ways that minors throughout Europe are exposed to alcohol advertising in their everyday life. ACTIVE is a federation of national sober youth organizations and another aim was for the research to be conducted largely by young people themselves. The project is funded by the European Union and the Swedish Institute.

### 1.2 School children and their alcohol use

Based on the ESPAD study (ESPAD = European School Project on Alcohol and other Drugs) , which has been questioning school children (15 and 16 years of age) in 40 countries about alcohol and drug use every four years since 1995, the most important data about alcohol use in Estonia, Latvia, Romania, Sweden, Poland and Ukraine will be summarized (ESPAD, 2011).

#### Abstinence and school children

In Europe 13% of all the school children have never used alcohol. In table 1, the lifetime abstinence from alcohol is described. In Latvia and Estonia more children have drunk alcohol in their lifetime in comparison with children in Europe. On the other side, in Romania and Sweden, there are much more abstainers from alcohol in comparison with the other European countries.

Table 1: School children (15, 16): percentage of lifetime abstinence from alcohol.

| Country | Average | Boys | Girls |
|---------|---------|------|-------|
| Estonia | 5       | 6    | 4     |
| Latvia  | 4       | 5    | 3     |
| Romania | 21      | 17   | 24    |
| Sweden  | 24      | 24   | 24    |
| Poland  | 13      | 11   | 14    |
| Ukraine | 11      | 13   | 10    |
| Europe  | 13      | 12   | 14    |

#### Drinking during the last 12 months

From the European school children (15 en 16 year) 79% have drunk alcohol during the last 12 months, boys slightly more than girls (79% vs. 78%). From the participating countries of the Zoom in Media study more Latvian and Estonian children have drunk alcohol during the last 12 months in comparison with the European children. Less school children from Romania and Sweden drank alcohol in the last 12 months, but the differences are small.

Table 2: School children (15 and 16): use of any alcoholic beverage during the last 12 months (%)

| Country | Average | Boys | Girls |
|---------|---------|------|-------|
| Estonia | 85      | 83   | 88    |
| Latvia  | 87      | 85   | 90    |
| Romania | 72      | 76   | 68    |
| Sweden  | 65      | 63   | 66    |
| Poland  | 78      | 80   | 76    |
| Ukraine | 79      | 77   | 82    |
| Europe  | 79      | 79   | 78    |

### The amount of alcohol

Looking at the amount of times alcohol was consumed during the last 12 months, 18% of the European school children have consumed alcohol 20 times or more during the last 12 months. On average more boys have consumed alcohol 20 times or more during the last months than girls (22% vs. 14%).

Table 3: School children (15, 16): consumed alcohol 20 times or more during the last 12 months (%)

| Country | Average | Boys | Girls |
|---------|---------|------|-------|
| Estonia | 17      | 16   | 18    |
| Latvia  | 21      | 22   | 20    |
| Poland  | 17      | 22   | 12    |
| Romania | 11      | 16   | 7     |
| Sweden  | 7       | 7    | 6     |
| Ukraine | 15      | 16   | 14    |
| Europe  | 18      | 22   | 14    |

### The amount of consumed alcohol during the last drinking occasion

When we look at the amount of consumed alcohol during the last alcohol drinking day, the amount in Europe on average is 5.1 cl. and boys drank a bigger amount of alcohol (5.3 cl) then girls (4.3 cl). Looking at the counties of the Zoom in Media study, in Sweden and Estonia students drink much more and especially in Romania the students drink a smaller amount compared to the rest of Europe during their last alcohol drinking day.

Table 4: School children (15, 16): amount of consumed alcohol during the last drinking day (cl)

| Country | Average | Boys | Girls |
|---------|---------|------|-------|
| Estonia | 6.0*    | 6.7  | 5.3   |
| Latvia  | 5.0     | 6.0  | 4.1   |
| Romania | 3.1     | 3.6  | 2.6   |
| Sweden  | 7.0     | 7.1  | 6.8   |
| Poland  | 5.3     | 6.0  | 4.6   |
| Ukraine | 4.2     | 5.1  | 3.5   |
| Europe  | 5,1     | 5,3  | 4,3   |

\*6.0 cl is comparable with 5 standard glasses of beer (250 cc alcohol, 5%), 5 glasses of wine (100 cc alcohol, 12%) or 5 glasses of spirits (35 cc alcohol, 35%)

### School children and drunkenness

Of all European school children, 47% has ever been very drunk in their life. And more boys than girls reported being drunk (49% vs. 44%). The difference in lifetime drunkenness between boys and girls is remarkable in Sweden, where more girls than boys reported being drunk.

Table 5: Which percentage of school children (15, 16) were ever drunk?

| Country | Average | Boys | Girls |
|---------|---------|------|-------|
| Estonia | 55      | 55   | 54    |
| Latvia  | 66      | 67   | 64    |
| Romania | 33      | 39   | 29    |
| Sweden  | 38      | 35   | 42    |
| Poland  | 43      | 45   | 41    |
| Ukraine | 59      | 62   | 52    |
| Europe  | 47      | 49   | 44    |

### Binge drinking

Looking at European students, 39% has consumed 5 or more drinks at one occasion during the last 30 days (binge drinking). More boys reported to have consumed 5 or more drinks at one occasion during the last 30 days than girls (43% vs 35%).

Table 6: Percentage of school children (15, 16) that reported five or more drinks on one occasion during the last 30 days (binge drinking).

| Country | Average | Boys | Girls |
|---------|---------|------|-------|
| Estonia | 53      | 54   | 52    |
| Latvia  | 49      | 53   | 44    |
| Poland  | 37      | 40   | 34    |
| Romania | 36      | 42   | 32    |
| Sweden  | 31      | 29   | 33    |

|         |    |    |    |
|---------|----|----|----|
| Ukraine | 30 | 34 | 26 |
| Europe  | 39 | 43 | 35 |

## 2. Alcohol marketing regulations

At the European level there is only one legally binding document regulating alcohol marketing. This is the Audiovisual Media Services Directive of the European Union. Often abbreviated as AVMSD, its original focus lies on broadcast media. A recently proposed revision of the AVMSD aims to shift the focus to also include online video platforms.

Currently, the AVMSD mainly contains content restrictions on alcohol advertising, regulating what can be showed or said in alcohol advertisements. The directive does not contain any volume restrictions, regulating in which places, time slots or for which audiences alcohol advertising is allowed. The rules laid down in the AVMSD are described as minimum rules, with member states being allowed to have stronger or more far reaching restrictions.

In this paragraph, the different alcohol regulations will be described from Estonia, Latvia, Romania, Sweden, Poland and Ukraine.

### 2.1 Estonia

Estonia has a time ban in place for radio and television restricting alcohol advertising between 7AM and 9PM, during this time sponsorship messages are still allowed. Additionally, the Advertising Act knows a complete ban on alcohol advertising in cinemas. It also prohibits alcohol advertising in and on the building of schools for minors, as well as in close proximity thereof. Along with detailed restrictions for many different buildings and places alcohol ads are not allowed in or on are buildings intended for sports or healthcare and social welfare institutions. The front and back pages of newspapers are also places prohibited for alcohol advertising. Overall, outdoor advertisements are also prohibited with the exception of low-ethanol alcoholic beverages. Lastly, the law also contains detailed content restrictions which go beyond those of the AVMSD, while also requiring every alcohol advertisement to carry a mandatory health warning.

### 2.2 Latvia

The “Handling of Alcoholic Beverages” law, besides giving a number of qualitative restrictions requires all alcohol advertisements to carry a mandatory health warning about the risks associated with alcohol consumption. This same law also prohibits alcohol ads being placed in or on the walls of buildings with an educational or medical designation; on postal packages or correspondence paper; on external pages of books, magazines or newspapers; on and in public transport.

The “Radio and Television” Law contains additional qualitative restrictions pertaining to broadcast media, while the “Advertising Law” contains additional qualitative restrictions that pertain to all media.

The “Electronic Mass Media Law” prohibits the advertising and teleshopping of other alcoholic beverages than beer and wine in audio-visual media. It also contains a number of qualitative restrictions (e.g. alcohol advertisements may not be aimed at minors, and minors shall not participate in them) that are based on the limited standard set by the AVMSD. A notable exception to the earlier described partial ban on alcohol advertising is made for the “transmission of sporting and similar events in which advertising materials are placed in the background of events (advertising posters in stadiums, names of merchants and emblems, trademarks and the like) and it is not possible to avoid them.”

## **2.3 Romania**

Advertising of alcoholic beverages is regulated by the Advertising Law no.148/2000, which transposes certain European Union’s Rules and Regulations in the field. Explicit advertisements for alcoholic beverages are forbidden: on the first and on the last cover or page of magazines and newspapers or on travel tickets for public transport, within education units and medical assistance units or within the distance of 200 meters from their entrance, in publications intended mainly for minors, in auditoriums, before, during and after the shows intended for minors, when addressed to minors or when it shows minors consuming such products, when it suggests that alcoholic beverages are gifted with therapeutic properties or that they have a stimulating or a sedative effect or when it suggests that alcoholic beverages can solve different personal problems, when it highlights the alcohol content of alcoholic beverages and when it connects alcohol and driving.

Any form of advertisement for distilled alcoholic drinks is prohibited within television program services between 6.00 – 22.00 hours. Any form of advertisement for distilled alcoholic drinks is prohibited in radio broadcasting program services between the following hours: 6.00 – 8.00 and 10.00 – 22.00, from Monday to Friday; 6.00 – 22.00, on Saturday and Sunday. The broadcast of advertisement for alcoholic drinks that promote violent, aggressive or antisocial behavior or attitudes is prohibited. It is prohibited to broadcast promotional announcements or competitions that include references to the name or trademark of a distilled alcoholic beverage; within competitions it is prohibited to offer prizes sponsored by companies producing such beverages. Also, the broadcast of advertising spots for alcoholic drinks featuring minors is prohibited. The broadcast of sports transmissions sponsored by alcoholic beverages producers may be broadcast only between 23.00 – 6.00. The advertising packages that promote products of distilled alcohol shall end with the audio and visual warning “Excessive consumption of alcohol seriously damages health” (Article 116 of the Regulatory Code of Audio-visual).

## **2.4 Sweden**

Sweden has one of the strongest legal restrictions on alcohol and alcohol marketing in Europe. The Alcohol Act states that all marketing to consumers must be distinctly moderate and are not allowed to be intrusive. Alcoholic beverages as gifts are not allowed. Advertising in periodical publications is allowed for alcoholic beverages that are not stronger than 15 % VOL. Alcohol advertising must be moderate and



can only express the product or describe the contents. All alcohol advertisements must hold a text of information about the risks that are connected with alcohol consumption (for example: "alcohol can damage your health"). Outdoor advertisement, as well as TV and radio ads are not considered distinctly moderate and therefore not allowed in Sweden. The same goes for advertisement for example in cinemas, sports centers, hospitals and busses.

The legal minimum age for on-premise sales of beer / wine / spirits lies at 18, while the legal minimum age for off-premise sale of wine and spirits lies at 20 years of age.

## **2.5 Poland**

The Act of October 26th, 1982 on Upbringing in Sobriety and Counteracting Alcoholism contains two articles pertaining to the promoting, advertising and sponsoring of alcoholic beverages. According to the law only beer is allowed to be advertised and promoted through media channels like TV, radio, billboards etc. The only exception for this is at points of sale of alcoholic beverages: In these places (a liquor store, a restaurant, a bar, a pub, a separate stall, a wholesale trade - they all have to have a special permission for alcoholic beverages selling) any kind of alcoholic beverages might be promoted and advertised in any way.

The Act of October 26th, 1982 on Upbringing in Sobriety and Counteracting Alcoholism has been changed many times both in the direction of liberalization and more restrictions (it depends mostly on the current government's alcohol policy). Long term analysis shows that when the national law moves in the direction of more restrictions and stricter rules it causes more respect among alcohol producers and the alcohol marketing practices field seems to be well organized. Any liberalization of the Polish alcohol law usually causes some chaos in marketing practices and gives the producers much more flexibility to promote their products. Among many other issues there has always been a discussion concerning the rules regarding TV advertising. The last version of the Act of October 26th, 1982 on Upbringing in Sobriety and Counteracting Alcoholism from the 1.04.2005, allows beer producers to advertise their products on TV channels after 8 p.m. In the past there were many different options: after 11 p.m., only non-alcoholic beverages were allowed to be advertised.

## **2.6 Ukraine**

The Law on Public Television and Radio Broadcasting of Ukraine (Verkhovna Rada (VVR), 2014, № 27, st.904) prohibits all alcohol marketing on public television with the exception of broadcasts which have acquired the right to broadcast international sports.

The Law on advertising has a number of articles regulating alcohol advertising. It gives content regulations for sports sponsorship (no audio allowed, only the brand name/logo). It further describes a time ban, prohibiting alcohol advertisements in broadcast media between 6AM and 11PM, while also banning alcohol ads on the front and back pages of newspapers, on front and back covers of magazines and other publications, advertising on transport, through actions of advertising character (except for special exhibition arrangements).

The Law on Advertising also contains a number of content restrictions which are in line with those in the AVMSD (e.g. no children in alcohol advertising), while also prohibiting alcohol ads to be placed closer than 300 meters of direct visibility from the territory of infant, secondary general and other educational establishments where children under 18 go.

Where alcohol advertising is allowed it is to be accompanied by a mandatory health warning taking up at least 15 percent of the total area of the advertisement. The law further requires alcohol and tobacco producers to allocate 5% of their funds to produce and disseminate social awareness campaigning materials about the health damage associated with their products.

### **3. Method**

#### **3.1 Application**

This research was conducted using the EUCAM Smartphone application, which consists of two surveys with which users can fill in background information about themselves, as well as record alcohol advertisements and fill in information about the advertisements and their attitude towards it. The application makes it possible to record images of the advertisements, with survey data linked to it, including GPS data of where the advertisement was encountered. As soon as the smartphone, to which the application is installed, connects to the internet survey results are automatically sent to an online database.

Some of the respondents filled out a background survey consisting of demographic questions, including age, sex, education level, place of residence, religion as well as questions about their attitudes towards advertising, as well as their drinking habits. This background survey was filled out and uploaded before using the monitoring survey. This is a survey which starts with selecting which type of marketing is being recorded (TV commercial, online banner or in-store promotion for example), after which a picture can be made using the smartphone's camera, continued by answering questions about the content and environment of the advertising.

#### **3.2 Respondents**

The background survey was filled in by 274 respondents. From the 274 respondents who filled in this questionnaire, 109 are boys, 138 are girls, and 27 filled in 'other' or did not fill in anything. Youngsters eligible were between the ages of 11 to 33. A total of 904 advertisements were monitored by using the monitoring survey. These 904 advertisements are not only monitored by the 274 respondents who filled in the background questionnaire, but by all the students who participated in the research.

#### **3.3 Data collection**

The data in the Zoom-in Media study is collected between February 2015 and May 2016. The students in Romania collected the data between March and June 2015 in the cities of Bucharest and Oltenita, the

students in Poland between March and May 2015 in Bytom, Gdańsk, Poznań, Warszawa, Katowice, Bytom, Przemyśl, Łódź and Lublin, in Estonia between March and June 2016 in the cities of Tallinn and Tartu, in Sweden between February and December 2015 mainly in Uppsala, Stockholm, Umeå and in Latvia between April and May 2016 in Rzekne, Līgatne, Sigulda and Rīga.

## 4. Country Findings

### 4.1 Attitudes towards advertising

In the background interview the students were asked to fill in their agreement or disagreement towards a number of statements pertaining to advertisements. These questions could also be divided in positive attitudes (for instance 'We can depend on getting the truth in most advertising') as well as negative attitudes (for instance 'Most advertising does not give consumers important information'), all of the statements used focused on the respondents trust in advertising. Respondents in response to these statements were asked to fill in a 100 point Likert scale with 'disagree' on the left and 'agree' on the right.

In the below two figures we will show how the respondents on average filled in these questions towards advertisements. Only students from Estonia, Latvia, Romania and Sweden filled in these questions.

Figure 1: Positive advertising attitudes

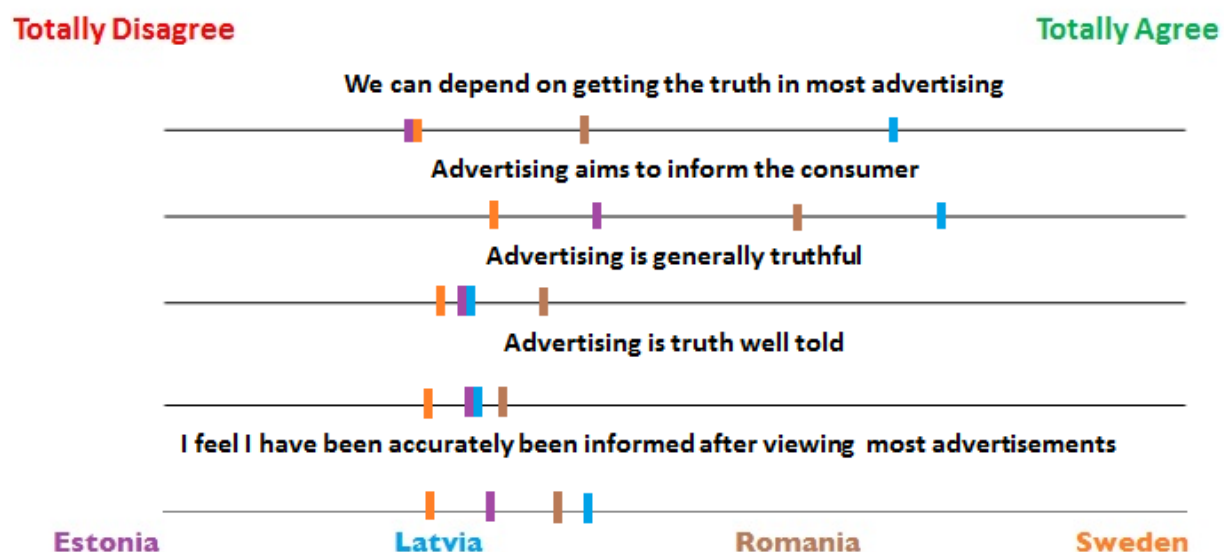


Figure 2: Negative advertising attitudes



Looking at the results of the positive advertising attitudes, we can see that the students from Sweden and Estonia have less positive attitudes towards advertising compared with students from Romania and Latvia. Comparing the four countries on the negative advertising attitudes, the results are more close to each other. The students from Estonia have in general the most negative attitudes towards advertising and the students from Romania the less negative attitudes in comparison with the other three countries.

#### 4.2 Alcohol marketing monitored

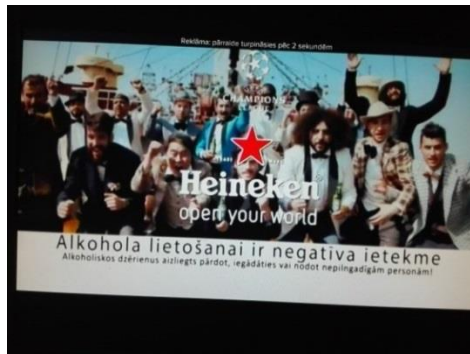
Table 7 gives an overview of the different types of alcohol advertisements that were monitored. The top three of identified advertisements are online advertising (internet; 28,9%), print advertisements (20,2%) and out-door advertisement (12,7%). In general, all the students have monitored only 16 promotional items (1,8%), 18 times event sponsoring (2,0%) and 32 times a flyer (3,5%).

The differences between the types of monitored advertisements in the five countries are minimal. We can see that the students in Sweden monitored the most print advertisements (50,8%), the students in Romania the most advertisements online (44%) and the students in Estonia the most outdoor advertisements (28,8%).

Table 7: different types of monitored advertisements

| Kind of advertisement monitored                    |            |            |            |            |            |                    |
|--|------------|------------|------------|------------|------------|--------------------|
|  | Estonia    | Latvia     | Romania    | Sweden     | Poland     | Total              |
| <b>1 TV</b>  | 3 (1.3%)   | 2 (1.9%)   | 12 (8.5%)  | 8 (4.2%)   | 49 (20.3%) | <b>74 (8.2%)</b>   |
| <b>2 Radio</b>                                     | 0 (0.0%)   | 0 (0.0%)   | 1 (0.7%)   | 0 (0.0%)   | 40 (16.6%) | <b>41 (4.5%)</b>   |
| <b>3 Internet</b>                                  | 64 (28.3%) | 44 (41.1%) | 62 (44%)   | 54 (28.6%) | 37 (15.4%) | <b>261(28.9%)</b>  |
| <b>4 print<br/>(magazines &amp;<br/>newspaper)</b> | 18 (8.0%)  | 33(30.8%)  | 21 (14.9%) | 96 (50.8%) | 15 (6.2%)  | <b>183 (20.2%)</b> |
| <b>5 outdoor</b>                                   | 65 (28.8%) | 3 (2.8%)   | 20 (14.2%) | 2 (1.1%)   | 25 (10.4%) | <b>115 (12.7%)</b> |
| <b>6 in-store<br/>promotion</b>                    | 16 (7.1%)  | 8 (7.5%)   | 10 (7.1%)  | 19 (10.1%) | 15 (6.2%)  | <b>68 (7.5%)</b>   |
| <b>7 in-club<br/>promotion</b>                     | 38 (16.8%) | 0 (0.0 %)  | 6 (4.3%)   | 3 (1.6%)   | 11 (4.6%)  | <b>58 (6.4%)</b>   |
| <b>8 event<br/>sponsoring</b>                      | 13 (5.7%)  | 0 (0.0%)   | 4 (2.8%)   | 1 (0.5%)   | 0 (0.0%)   | <b>18 (2.0%)</b>   |
| <b>9 flyers</b>                                    | 5 (2.2%)   | 2 (1.9%)   | 4 (2.8%)   | 1 (0.5%)   | 20 (8.3%)  | <b>32 (3.5%)</b>   |
| <b>10 promotional<br/>items</b>                    | 2 (0.9%)   | 5 (4.7%)   | 0 (0.0%)   | 1 (0.5%)   | 8 (3.3%)   | <b>16 (1.8%)</b>   |
| <b>11 other</b>                                    | 2 (0.9%)   | 10 (9.3%)  | 1 (0.7%)   | 4 (2.1%)   | 21 (8.7%)  | <b>38 (4.2%)</b>   |
| <b>Total</b>                                       | 226 (100%) | 107 (100%) | 141 (100%) | 189 (100%) | 241 (100%) | <b>904 (100%)</b>  |

A selection of advertisements from television and internet (Facebook, Instagram & websites):



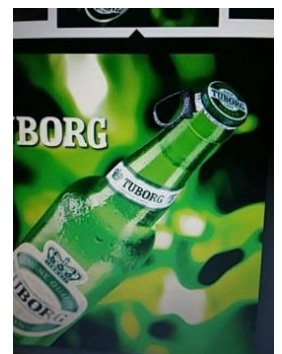
Latvian Adv.



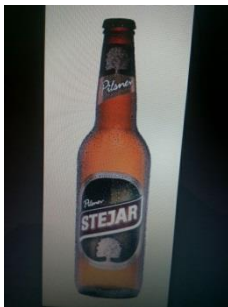
Latvian Adv.



Latvian Adv.



Romanian Adv.



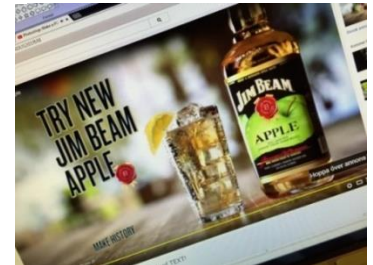
Romanian Adv.



Swedish Adv.



Swedish Adv.



Swedish Adv.



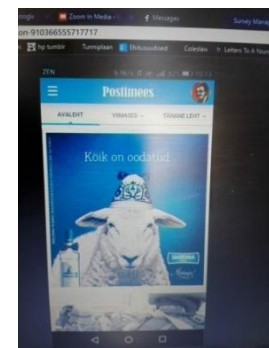
Polish Adv.



Polish Adv.



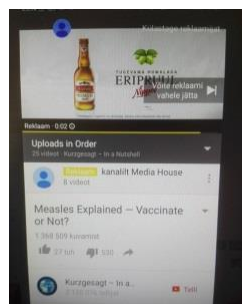
Polish Adv.



Estonian Adv.



Estonian Adv.



Estonian Adv.

In the questionnaire was asked what kind of marketing practice they found on the internet. In table 8 we see that and in Latvia and Poland approximately the same kind of Online advertisement were found. In Estonia we see that mostly banners and online videos were monitored by the students. In general, the students find mostly advertisements on social network sites.

Table 8: Kind of Marketing practice on the internet .

| Kind of online advertisement monitored |                  |                  |         |        |                  |                        |
|--|------------------|------------------|---------|--------|------------------|------------------------|
|  | Estonia          | Latvia           | Romania | Sweden | Poland           | Total                  |
| <b>1 Banners</b>                       | 22<br>(34.4%)    | 0 (0.0%)         | *       | *      | 2 (5.4%)         | 24 (16.6%)             |
| <b>2 Alcohol industry webpage</b>      | 0 (0.0%)         | 4 (9.1%)         | *       | *      | 5 (13.5%)        | 9 (6.2%)               |
| <b>3 user generated ads</b>            | 0 (0.0%)         | 21 (47.7%)       | *       | *      | 6 (16.2%)        | 27 (18.6%)             |
| <b>4 fan page</b>                      | 0 (0.0%)         | 0 (0.0%)         | *       | *      | 5 (13.5%)        | 5 (3.4%)               |
| <b>5 social network sites</b>          | 13<br>(20.3%)    | 10 (22.7%)       | *       | *      | 9 (24.3%)        | 32 (22.1%)             |
| <b>6 online video</b>                  | 27<br>(42.2%)    | 4 (9.1%)         | *       | *      | 5 (13.5%)        | 36 (24.8%)             |
| <b>7 sponsorship</b>                   | 0 (0.0%)         | 2 (4.6%)         | *       | *      | 1 (2.7%)         | 3 (2.1%)               |
| <b>8 other</b>                         | 2 (3.1%)         | 3 (6.8%)         | *       | *      | 4 (10.8%)        | 9 (6.2%)               |
| <b>Total</b>                           | <b>64 (100%)</b> | <b>44 (100%)</b> | *       | *      | <b>37 (100%)</b> | <b>145(100%)</b><br>** |

\* data not collected

\*\* Without the 54 online advert. in Sweden and 62 online advert. in Romania



A selection of advertisements from print (magazines and newsletters):



Latvian Adv.



Latvian Adv.



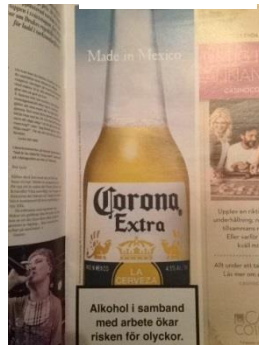
Latvian Adv.



Latvian Adv.



Swedish Adv.



Swedish Adv.



Romanian Adv.



Estonian Adv.



Estonian Adv.



Estonian Adv.



Polish Adv.



Polish Adv.



In total 183 printed advertisements were monitored. The respondents were asked what they would think what the intended audience of the newspaper or magazine was. The students do not think that the advertisements are directed at minors, but they say that the intended audience of the printed advertisements are adults and people with all ages.

Table 9: Intended audience of the newspaper and magazine

| Intended audience of the newspaper and magazine |                  |                  |         |                  |                  |                        |
|---|------------------|------------------|---------|------------------|------------------|------------------------|
|   | Estonia          | Latvia           | Romania | Sweden           | Poland           | Total                  |
| 1 Minors (-18)                                  | 0 (0.0%)         | 0 (0.0%)         | *       | 0 (0.0%)         | 0 (0.0%)         | <b>0 (0.0%)</b>        |
| 2 Young Adults (20-40)                          | 8 (44.4%)        | 13 (39.4%)       | *       | 16 (16.7%)       | 6 (40.0%)        | <b>43 (26.5%)</b>      |
| 3 Adults (40+)                                  | 2 (11.2%)        | 9(27.3%)         | *       | 55 (57.3%)       | 0 (0.0%)         | <b>66 (40.8%)</b>      |
| 4 All ages                                      | 8 (44.4%)        | 11(33.3%)        | *       | 25 (26.0%)       | 9 (60.0%)        | <b>53 (32.7%)</b>      |
| <b>Total</b>                                    | <b>18 (100%)</b> | <b>33 (100%)</b> | *       | <b>96 (100%)</b> | <b>15 (100%)</b> | <b>162(100%)</b><br>** |

\* Data was not collected    \*\* Without the 21 printed advertisements in Romania

In total 115 outdoor advertisements were monitored. The respondents were asked what kind of marketing practice these outdoor advertisements were. In Poland mostly 'posters' were monitored and in Estonia the advertisement were mostly as a 'display window or promotion in front of the store' seen.

Table 10: Kind of Marketing practice on outdoor advertisements

| Kind of outdoor advertisement monitored                 |                 |                 |         |        |                  |                    |
|---|-----------------|-----------------|---------|--------|------------------|--------------------|
|   | Estonia         | Latvia          | Romania | Sweden | Poland           | Total              |
| <b>1 Posters</b>  | 1 (1.5%)        | 0 (0.0%)        | *       | *      | 10 (40.0%)       | <b>11 (11.8%)</b>  |
| <b>2 Billboards</b>                                     | 8 (12.3%)       | 1 (33.3%)       | *       | *      | 3 (12.0%)        | <b>12 (12.9%)</b>  |
| <b>3 Flyers</b>   | 0 (0.0%)        | 1 (33.3%)       | *       | *      | 1 (4.0%)         | <b>2 (2.2%)</b>    |
| <b>4 Illuminated signs</b>                              | 16 (24.6%)      | 0 (0.0%)        | *       | *      | 5 (20.0%)        | <b>21 (22.6%)</b>  |
| <b>5 Display window/promotion in front of the store</b> | 28 (43.1%)      | 1 (33.3%)       | *       | *      | 3 (12.0%)        | <b>32 (34.4%)</b>  |
| <b>6 Sponsorship</b>                                    | 5 (7.7%)        | 0 (0.0%)        | *       | *      | 3 (12.0%)        | <b>8 (8.6%)</b>    |
| <b>7 other</b>  | 7 (10.8%)       | 0 (0.0%)        | *       | *      | 0 (0.0%)         | <b>7 (7.5%)</b>    |
| <b>Total</b>  | <b>65(100%)</b> | <b>3 (100%)</b> | *       | *      | <b>25 (100%)</b> | <b>93 (100%)**</b> |

\* data not collected    \*\* Without the 20 out-door advert. in Romania and 2 outdoor advert. In Sweden.

A selection of advertisements from outdoor promotion, in-store promotion, promotional items, flyers and others:



Latvian outdoor Adv.



Latvian in-club Adv.



Latvian outdoor Adv.



Latvian 'other' Adv.



Latvian promotional Adv.



Romanian flyer Adv.



Romanian outdoor Adv.



Romanian outdoor Adv.



Romanian outdoor Adv.



Swedish in-store Adv.



Swedish in-club Adv.



Swedish in-store Adv.



Swedish outdoor Adv.



Estonian in-store Adv.



Estonian outdoor Adv.



Estonian in-club Adv.



Estonian event Adv.



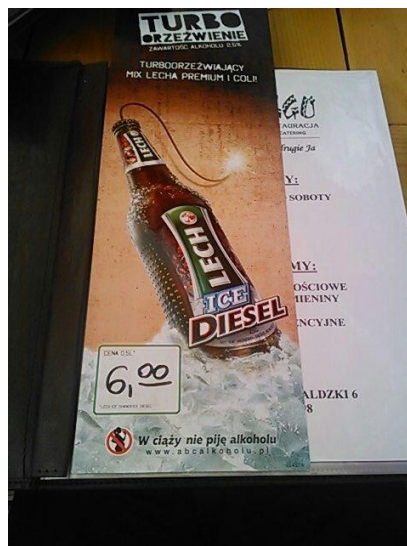
Estonian event Adv.



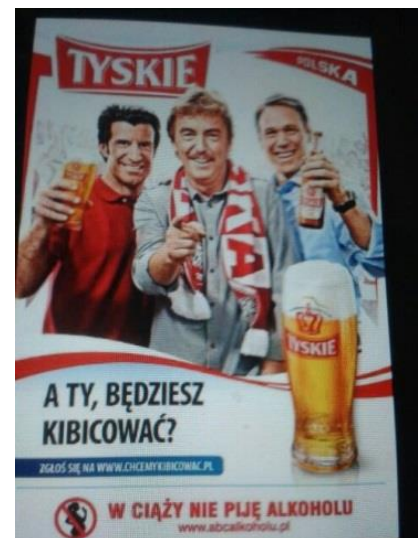
Polish flyer Adv.



Polish in-club Adv.



Polish in-club Adv.



Polish outdoor Adv.





Polish outdoor Adv.



Romanian in-store Adv.



Romanian in-store Adv.



Romanian outdoor Adv.



Romanian outdoor Adv.



Romanian outdoor Adv.

In total 68 in-store advertisements were monitored. The respondents were asked what kind of marketing practice these outdoor advertisements were. In Sweden and Poland the students were able to choose multiple categories per advertisement. Price, posters and promotional stands were monitored most in-store.

Table 11: Kind of marketing practice on in-store advertisements

\* data not collected \*\*\* Without the 10 in-store advertisements in Romania

| Kind of in-store advertisement monitored |           |           |         |        |        |                     |
|--|-----------|-----------|---------|--------|--------|---------------------|
|  | Estonia   | Latvia    | Romania | Sweden | Poland | Total               |
| <b>1 Price</b>                           | 1 (6.3%)  | 0 (0.0%)  | *       | 14**   | 11**   | <b>26 (36.1%)</b>   |
| <b>2 Posters</b>                         | 4 (25.0%) | 3 (37.5%) | *       | 9**    | 4**    | <b>20 (27.8%)</b>   |
| <b>3 Promotional team</b>                | 0 (0.0%)  | 0 (0.0%)  | *       | 1**    | 0      | <b>1 (1.4%)</b>     |
| <b>4 Promotional stands</b>              | 6 (37.4%) | 4 (50.0%) | *       | 3**    | 1**    | <b>14 (19.4%)</b>   |
| <b>5 Sponsorship</b>                     | 1 (6.3%)  | 0 (0.0%)  | *       | 1**    | 2**    | <b>4 (5.6%)</b>     |
| <b>6 other</b>                           | 4 (25.0%) | 1 (12.5%) | *       | 2**    | 0      | <b>7 (9.7%)</b>     |
| <b>Total</b>                             | 16 (100%) | 8 (100%)  | *       | 30**   | 18**   | <b>72 (100%)***</b> |

\*\* It was possible to give multiple answers to the question: what kind of marketing practice the in-store advertisement was. Because of multiple answers given, no percentile scores were calculated.

## **5 Conclusions**

### **5.1 Sum-up**

Because of the different way the contributors of the participating countries gathered the data we are not able to draw overarching conclusions. The consumption data of the ESPAD report show that drinking alcohol seems to be a normal accepted habit of the majority of school children from 15 and 16 years of age in all the participating countries. Particularly the number of glasses (4-6 on average) they drank on the last drinking day is shocking.

Although this study is not intended and has not the power to prove the impact of alcohol marketing on the drinking behaviour of young people, the range of the attractive examples of the collected marketing practices speaks for itself.

### **5.2 Limitations**

Unfortunately only 274 respondents filled in their background information and their attitudes toward advertisements. Therefore this information is not representative for the youth out of Estonia, Latvia, Romania, Sweden, Poland, and Ukraine, but gives some small insights in some of the respondents' thoughts. Luckily more advertisements were monitored, but also the sample of 904 advertisements monitored is not representative of the advertisements in the Zoom-in Media countries to which youth as a whole are exposed to. Secondly errors were made in translating the surveys, which resulted in certain questions becoming unusable in a number of countries.

We have no information about the recruiting of the students in the different countries. This may well be done differently in every country, which has a substantial impact on the results of the research. Because the recruiting was coordinated by different national country coordinators, there was no fixed plan for the recruiting of the students.

Additionally, the monitoring was not rigidly structured, the young people that participated were instructed to collect the materials as they came across them in their everyday life. However it may well be possible that a number of respondents did not actually (or not only) do this, but also took their smartphone out as they sat behind a computer to quickly gather some more (online) advertisements. This may be another explanation for the high number of collected online alcohol advertisements, aside from the aggressive pervasiveness of online alcohol advertising.

Summarizing we can say that the Zoomin Media Project was a very ambitious project in that it not only wanted research results, but also educate young people about the effects of alcohol marketing on drinking behavior and national regulations on alcohol marketing, but also in letting the research be conducted by young people (in some cases inexperienced in the field of research). Looking back the aims were partially achieved: (1) This report and the national report give a snapshot of the various ways that young people encounter alcohol advertising in their daily lives; (2) it has focused the participants' attention on the subject of alcohol marketing and its effects, as well as the national regulations; (3) in

various phases of the project it became apparent that the goal of acquainting young people with research through this project, however amendable, was not conducive to maintaining the quality of the research tools and dataset that was required for serious scientific analysis. Concluding we can say that Zoomin Media was a partly successful project in which young people have learned a lot and have more than made up any lack of research skills with enthusiasm and vigor.