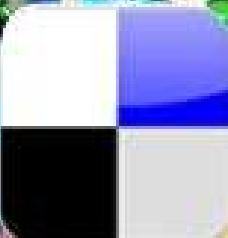




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Report on trends and innovations in alcohol marketing

Trends in alcohol marketing

Results of monitoring alcohol marketing in Bulgaria in 2010

AMMIE Project

Alcohol Marketing Monitoring in Europe

Report on Trends in Bulgaria

July, 2011

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1. Introduction

The influence of alcohol advertising on the drinking behaviour of youngsters is clear. In a review study by Anderson et al. (2009) published in the scientific journal *Alcohol & Alcoholism*, 13 longitudinal studies on the effect of alcohol advertising and media on youth drinking behavior were analyzed.

A total of over 38.000 youngsters were followed for a longer period of time in these 13 studies. Twelve out of thirteen studies proved an effect of alcohol marketing exposure on drinking behavior: the more youngsters were exposed to alcohol advertising, the earlier their age of onset of drinking alcohol. Also, a higher exposure was related to a higher consumption in the already drinkers. The only study that did not find a direct relationship with drinking behavior did find an increased intention amongst youngsters to start drinking in the future. Intention has proven to be the strongest predictor of behavior (Ajzen, 1991).

Taken together, *longitudinal* studies consistently point into the same direction: the more alcohol advertising youngsters are exposed to, the bigger the impact on their drinking behavior. But also studies that investigate the effects of exposure to alcohol cues on drinking behavior in the *short term* find effects on alcohol consumption (e.g. Engels et al., 2009; Koordeman et al., 2011a; 2011b; 2011c). Adolescents who watch movies that e.g. contain more alcohol scenes drink significantly more alcohol than youngsters who see a movie without/with less alcohol cues. Separate analyses of the sipping behavior indicates that the viewers unconsciously imitate the drinking behavior of the actors who are consuming alcohol in the movie (Kooreman et al., 2011).

1.1 Trends report 2010

In the present report, trends and innovations in alcohol advertising and marketing from 2010 will be described. Systematic monitoring of alcohol advertising can provide a clear picture of the possibilities that alcohol advertisers in the Netherlands (still) have to advertise for their product in order to attract and influence the drinking behavior of new and existing consumers.

1.2 Marketing mix

It is important, while reading the report, to keep in mind the basic, tactical components of a marketing plan, called the “marketing mix”. The marketing mix is also known as the four P’s, referring to the four marketing mix elements important in the marketing of any product (see Figure 1):

Price: there are numerous ways to price a product.

Place: Place is also known as **channel, distribution, or intermediary**. It is the mechanism through which goods and/or services are moved from the manufacturer/ service provider to the user or consumer.

Product: consists of three levels: Core (the non-physical benefit of the product that makes it valuable to you), Actual (the tangible, physical product) and Augmented product (the non-physical part of the product which usually consists of lots of added value).

Promotion: This includes all of the tools available to the marketer for 'marketing communication'.



Figure 1. The marketing mix.

1.3 Attractive advertising is allowed

As will become clear throughout the report, much of the advertising is very attractive, also to young people. It is remarkable, however, that many of the often very attractive alcohol advertising practices are *not* in violation with the voluntary rules that the alcohol advertisers themselves created (the self-regulatory Advertising Code for Alcoholic Beverages). The Code was once established by the alcohol advertisers in order to protect minors from advertising that is 'specifically targeting minors'. Since the rules of the self-regulatory advertising Code have been formulated by the alcohol advertisers themselves it is understandable that they still offer a lot of room to create attractive advertising, which might not be 'specifically targeting' minors, but can still be very appealing to them (which is as harmful).

1.4 Alcohol policy

The insights created by this report can be used to develop effective policy on alcohol advertising. The report shows that alcohol marketing and advertising is very versatile with respect to content, form, type of medium used, and volume or amount. When developing alcohol policy that aims to restrict the harmful effects of alcohol advertising, one should take this broad range of practices into account. Given the variety of alcohol advertising, not only via traditional media (e.g. radio, tv and print), but also via new and less 'measurable' media (e.g. internet, social media and promotional items), the partial time ban on radio and television is a first, but also relatively modest measure to better protect minors. After all, alcohol advertising through a lot of other media is not yet restricted and shifts in advertising patterns might occur.

1.5 Structural monitoring of alcohol marketing

The present report has been written within the AMMIE project. All AMMIE reports can be found on www.eucam.info/eucam/home/ammie.html.

The trends in alcohol advertising and marketing from 2010 have been analyzed based on information from several sources that have been monitored continuously and as structurally as possible during the entire year 2010. The most important sources of information were:

- Program Creative Dynamix from Nielsen Media – used for the collection of advertising practices in traditional media (radio, tv, print, outdoor) and for a content analysis on all tv commercials for alcohol broadcasted in 2010
- Websites / Digital newsletters / Social media platforms and Annual Reports from alcohol producers
- Articles in newspapers or information from other media sources about alcohol
- Outdoor marketing – billboards, printed materials. We checked them: at least once a week for the websites, every day for the others.

1.6 Overview of the report

The report provides an overview of alcohol advertising in different media in 2010 (Chapters 2.1 and 2.2), comparison between different drinks (Chapter 2.3). In Chapter 2.4 recent marketing strategies used by alcohol producers in 2010 are described (e.g. marketing aimed at women, and the use of internet, social media). In short some conclusions and recommendations have been presented here.

Given the fact that the advertising and marketing for alcohol is very broad, this overview will not be complete. However, the aforementioned sources have been used as optimally as possible.

2. ALCOHOL ADVERTISEMENT IN DIFFERENT MEDIA

The alcohol marketing in Bulgaria uses a variety of strategies and resources. Its main characteristic is the rapid development and introduction of new forms.

2.1 Alcohol advertisement on television

After the change of the Law on Radio and Television in 2010 and with the establishment of the National Council for Self-regulation (NCSR) at the end of 2009, expansion of alcohol advertising, incl. the so called product placement, was observed, as well as important changes in the style of ads. TV ads became much more sophisticated and they attempt to circumvent the legal requirements through indirect implications for sport, sexual and social success, allowing broad interpretations, usually in favor of the alcohol industry. The main emphasis in advertising is on humor, which makes them especially appealing to children and young people, but the latter is difficult to prove.

Ads, aimed at presenting the merits of the product, are relatively few. Instead, advertising is mostly related to the use of lifestyle elements. Popular artists, singers, models, characters from TV programs are widely used. Most of them are part of youth culture, so they are much liked by young audiences.

Campaigns are seasonal. During winter, spirits are mostly advertised (rakia, vodka, whiskey) and dark beer as well. During summer, primarily advertised are beer and mastika. TV advertising of wine is poorly presented and usually it is related to product quality.

2.2. Alcohol advertisement in different media

Outdoor marketing

What's new in outdoor advertising of alcohol is that the large billboards in the city centre are getting relatively less in numbers due to higher prices charged by the municipality. However, some huge advertising posters hide entire facades of residential buildings:



Note: A billboard in front of the National Palace of Culture, Sofia.

New technologies are also introduced, e.g. illuminations on the facades of buildings at night, in which moving images are used in very large sizes, which makes them visible from a large distance. There are huge advertising posters related to the promotion of specific music and/or sport events:



Note: A billboard on a central street in Sofia.

The key element of outdoor alcohol advertising is that it is massively presented. People are practically overexposed to alcohol ads during their day in the city. The main emphasis comes from many shops and restaurants, covered with advertisements of alcohol. They are everywhere and are out of control:



Note: Advertisements of beer Kamenitza and Johnnie Walker whiskey on shops in the centre of Sofia.



Note: Advertisement of Johnnie Walker whiskey on a building in the centre of Sofia.

Billboards with alcohol advertising are found mainly by rural roads and highways. They tend to become more sophisticated. The excessive erotica used in 2008 was replaced by more acceptable vision in line with existing regulations and consequently the appeals against these ads were rejected. For comparison the vodka Flirt billboard from 2008 is present:



Note: "Vodka Flirt – Games for the advanced. Go ahead!"



Sex can lead to love. This does not have to stop you.

Vodka Flirt – Games for the advanced

Note: Vodka Flirt billboard from 2010.

Another example of the change in style are the billboards of mastika Peshtera:



Note: Billboards from 2008 and 2009.



Note: Billboard from 2010.

Online marketing

The monitoring of corporate websites of different alcohol brands has shown that they stick to the basic requirement for the so called 'check age', but according to us this does not effectively limit children's access to them. Bulgarian producers continue to evade this level of control. Instead of entering a date of birth, on the website of vodka Flirt (www.flirt.bg), for example, there is a question: "Are you ready for tonight?"

Besides TV commercials and billboards, on websites one can find information about sponsored concerts or sport events. A variety of competitions with prizes are also held up. Novelty are interactive websites where in the form of a game the participants are exposed to direct advertising of alcohol and encouraged to alcohol (ab)use. Through these sites sport campaigns are also advertised – football games between professionals and amateurs, fishing, etc. (e.g. www.ariana.bg, www.ledenika.com).

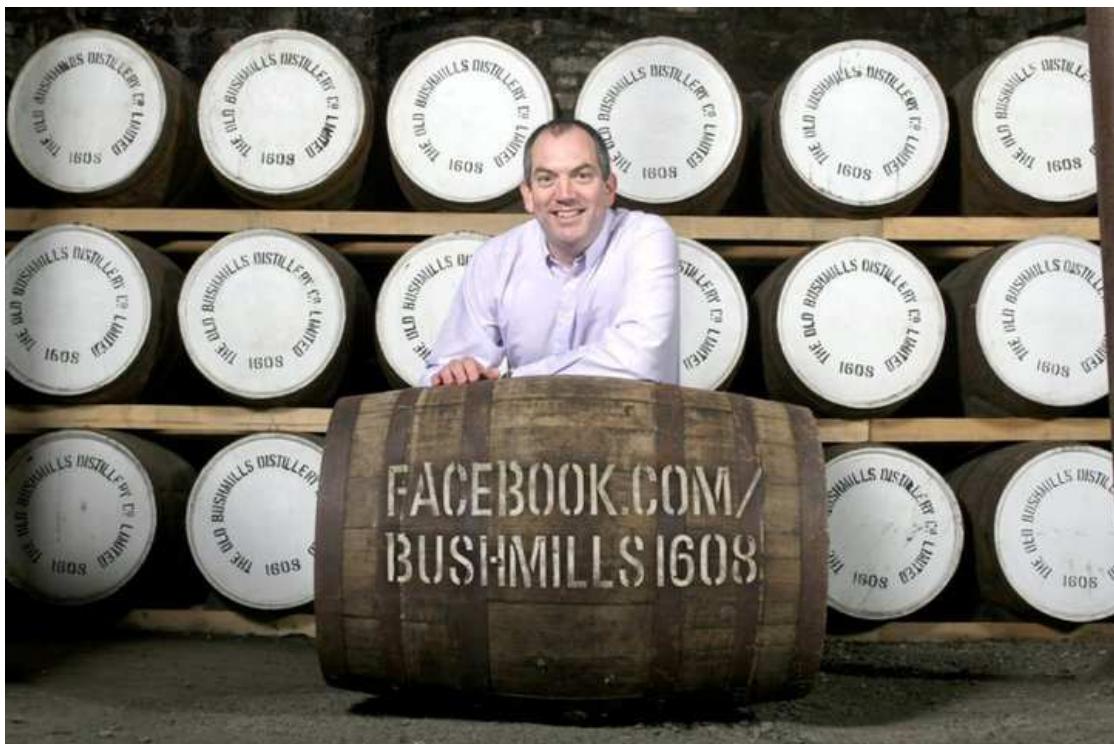


Note: Ariana beer official website (www.ariana.bg).

Some websites have ads with vulgar content, suggesting sexual success (e.g. Boliarka beer, www.boliarka.com).

Subscriptions to electronic newsletters on the websites in 2010 showed that this activity does not develop. No message was received.

An important feature of online advertisements are fan websites of some brands (www.kamenitzafanclub.com), and the profiles of alcohol products on Facebook, e.g. Bushmills:



Note: Bushmill page on Facebook.

2.3 Alcohol advertisement of different drinks

Beer

Beer is a very popular drink in Bulgaria. There are many national and international brands, and major advertising campaigns. All resources and strategies are used. Campaigns are seasonal. In winter dark beer is advertised, and during the rest of the year – mostly bright.

A small part of TV advertising is focused on the quality of the product.

Most TV ads of beer are associated with lifestyle elements:



Note: Zagorka Dzun TV ad showing a party with alcohol consumption.

Humour elements:



Note: Kamenica – “Save the man” TV ad.



Note: Kamenitza - "We saw ourselves in the dark" TV ad.



Note: Heineken 'Champions League' TV ad.

These ads use elements of youth culture and so they appeal to young audiences, but most of them do not violate formally the regulation codes.

Manufacturers of beer are among the key sponsors of national teams and sport events, which is reflected in their corporate sites (e.g. Ariana, Kamenitza, Pirinsko) and on billboards (Zagorka Tennis Cup, Boris Becker).



Note: Zagorka Tennis Cup Billboard.



Note: Ariana 'Professionals face amateurs' billboard in front of the National football stadium.

The Manufacturers of Kamenitza present their corporate website (www.kamenitzafanclub.bg) as a fan club where you can find all the ads and announcements for upcoming sponsored events: music (music fan) and sports (football fan). A national football tournament called Kamenitza Fan Cup is held.



This image is a screenshot of a news article from the Kamenitza website. The headline reads "ЦСКА може да вземе "Българска армия" на концесия" (CSKA may take over "Bulgarian Army" stadium on concession). The article discusses the Ministry of Finance's plan to lease the CSKA stadium to CSKA, which has already paid over 2 million leva for the lease. The text also mentions that the stadium will be used for training and matches. At the bottom of the page, there's a section for registration with a "График за регистриране" (Registration schedule) button and a "Информация" (Information) button. Below this, there's a display of various Kamenitza beer products.

Note: Kamenitza Fan club web page (www.kamenitzafanclub.bg).

The manufacturers of beer sponsor various music events, which is reflected on billboards, e.g. Tuborg:



Note: Advertising billboard of the Boy George live DJ set in Yalta Club, Sofia.



Note: Grolsch Block Party 2010 (<http://www.slusham.com/grolsch-block-party-2010-tova-e-denyat-zasvezharite-v-sofiya.html>)

and Kamenitza.

They use advertising through overnight projections on the facades of public buildings (Hilton Hotel, Sofia - Tuborg).

Wine

Wine is a traditional product for Bulgaria, but advertising is focused outward, towards the export. The advertising of wine in Bulgaria has a very small share of the overall advertising of alcohol. There are TV ads, billboards and magazine ads that present the qualities of the product, but they do not violate any applicable regulations and are of no interest to youth.

Spirits

In November 2010 there was an addition to the ethical code of NCSR, regarding the spirits.

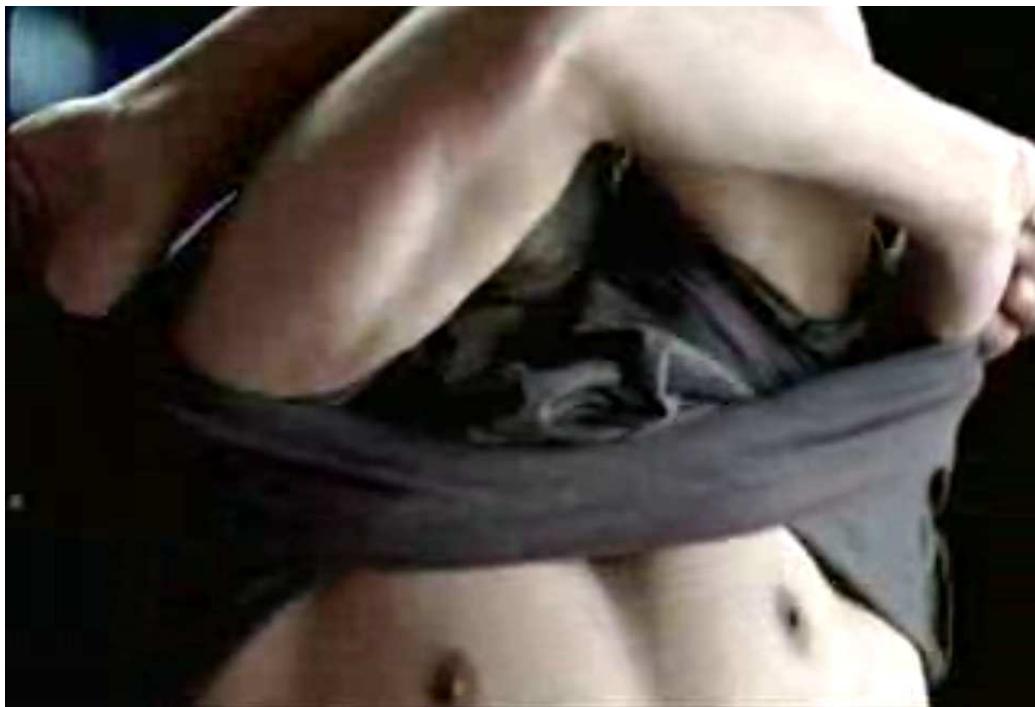
Among the spirits most popular are rakia and mastika produced in Bulgaria. Ads are particularly seasonal. During the summer mainly mastika is promoted (e.g. mastika Peshtera). TV commercials suggest sexual success through sexual discrimination and blatant vulgarity. Information about the TV spots and billboards could be found on corporate website. TV commercials of spirits use lifestyle elements and humor, but they are not aimed at young audiences.

In contrast, advertisements of vodka often target precisely them. The ads of Vodka Flirt reflect this practice – they use suggestions of sexual success through elements of youth culture and popular people. Some of the ads are downright vulgar. Despite the penalty imposed by NCSR, these ads can be found on the corporate sites e.g., Winery Peshtera (www.peshtera.com) – mastika Peshtera:



Note: Mastika Peshtera TV ad.





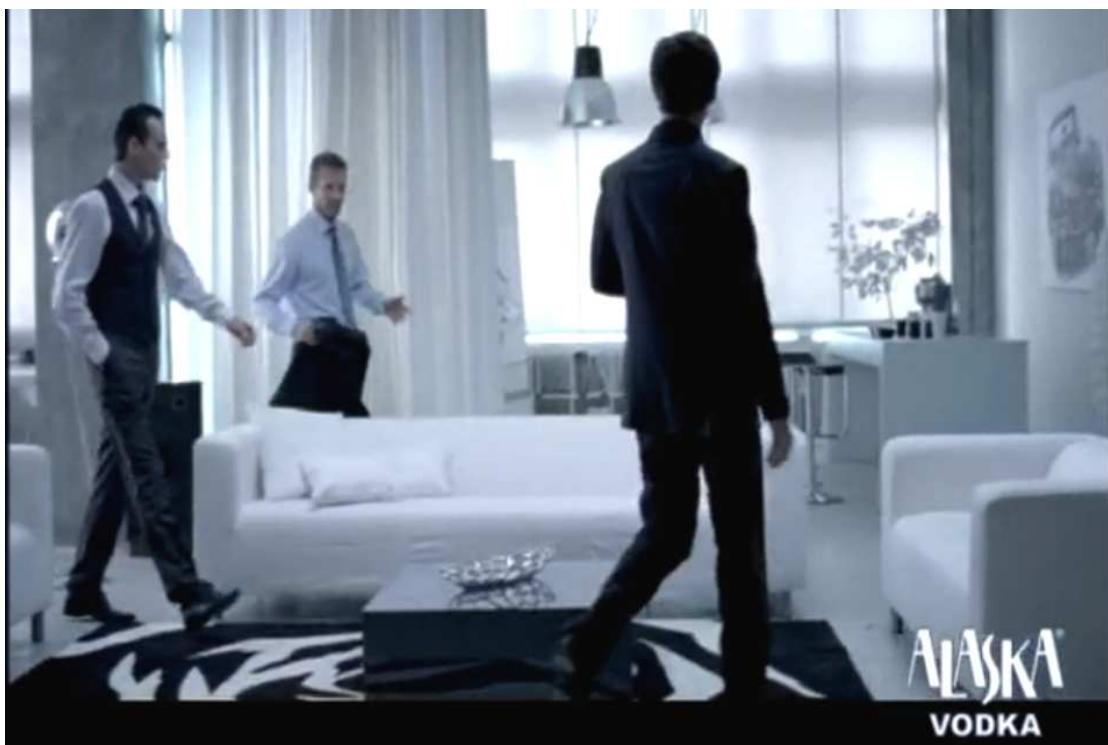
Note: Vodka Flirt 'Bartender' TV ad (www.flirt.bg).

Some manufacturers are not members of NCSR and they openly oppose the Code and the decisions of the European commission. An example in this regard are the vodka Orgasm ads, which can be found through free access on the corporate website and in weekly newspapers. These ads have pornographic content.



Note: Vodka Orgasm billboards.

Some TV ads of vodka inspire social success (Alaska).



Note: Vodka Alaska TV ad.

TV advertisements of whiskey also use humor:



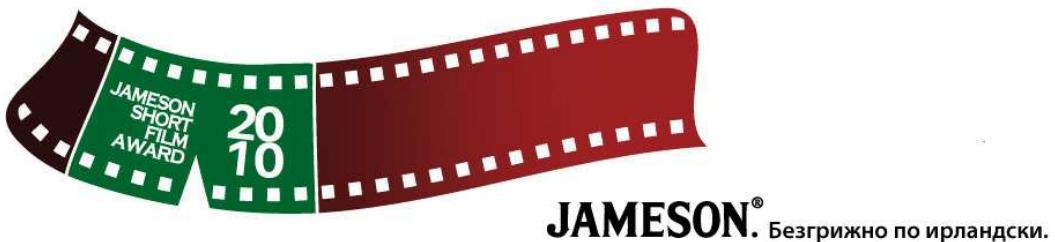
Note: Jameson whiskey TV ad.

Sport success (Johnnie Walker):



Note: Johnnie Walker TV ad with Jenson Button.

Producers of spirits sponsor concerts (Bushmills) and film festivals (Jameson),



Note: Jameson Short film Award 2010 billboard.

which is reflected on billboards and during the events themselves.

Some of the producers use new technology for outdoor advertising – for example, projections on the facades of public buildings (Chivas - Hilton Hotel, Sofia).

2.4 Marketing strategies

Social Corporate Responsibility campaigns

Kamenitza AD is the first and currently the only brewing company in Bulgaria, which signed in 2008 the European Road Safety Charter. In the same year the first edition of the "Alcohol is a bad driver" campaign was evaluated as the best campaign for road safety in the country by the EU Commissioner for Transport Mario Tajani. The company is the only Bulgarian producer of non-alcoholic brand of beer (Kamenitza 0%).

In the autumn of 2010 under the patronage of Deputy Prime Minister and Minister of Interior Mr. Tsvetanov and the Ambassador of the Kingdom of Belgium His Excellency Mark Mikilsen was held the third edition of the social responsibility of campaign Kamenitza AD "Alcohol is a bad driver".

In Sofia, Vidin, Vratsa and Dobrich a test car simulator and special goggles were tested to simulate the change in perception in the presence of 1.1 ppm alcohol - instability of the car, blurred vision, delayed reactions.

For the first time this year's campaign "Alcohol is a bad driver" was held outside the capital - in Vratsa, Vidin and Dobrich, where according to the official statistics of the traffic police, the number of accidents due to alcohol consumption for 2009 is the highest compared to other areas. All participants in the initiative received a leaflet with information on the level of alcohol in blood its effect on perceptions, a badge and beer Kamenitza 0%. Campaign partner in these cities is a

NGO called "Open Youth", which is also actively working towards raising awareness and responsibility and the culture of drivers on the road.

Through radio airwaves and the social network Facebook key messages of "Alcohol is a bad driver" reach the largest possible audience across the country. N-Joy and Z-Rock, as participants in the campaign, started radio games. An online game called "Alcohol is a bad driver" was also started on Facebook:



Note: 'Alcohol is a bad drivers' ad on Facebook.



Консумирайте с удоволствие и мърка.



www.alcoholbaddriver.bg

Медийни партньори:



СТАНДАРТ



Note: 'Alcohol is a bad drivers' ad on Facebook.

The Union of Brewers in Bulgaria, together with the Prevention and Information Centre for Addictions - Sofia, organized campaign to prevent alcohol use by persons under 18 years. Media partners of the event are radio MagicFM, Vesselina Radio, Radio Vitosha. A brochure, translated into Bulgarian language, was published by NIAAA-USA: Make a Difference – Talk to Your Child about Alcohol.

It should be stressed that the function of social corporate responsibility is very clear: to make the brands image better.

3. CONCLUSIONS

The trends spotted in Bulgaria in 2010 are:

- The use of lifestyle elements to promote a product;
- Season dependant marketing;
- Sponsorship of sports, movies and music events;
- Social Corporate Responsibility campaigns.

The marketing of alcohol in Bulgaria develops rapidly. Bulgaria's EU entry required compliance with several European directives, incl. in the field of alcohol policy. Existing legislation was changed in line with European requirements. An institution called NCRS (National Council for Self-regulation) was established. It showed much more activity compared to the state regulator (CEM – Council of Electronic Media).

Alcohol industry began to better comply with regulations. This is expressed mainly in the production of much more sophisticated promotional products than in previous years. In practice this means that the very vulgar ads have been mostly taken out, and the general approach is more 'decent'. However, this does not mean that ads have become less appealing to youth. On the contrary, content is most often associated with lifestyle elements and characters, for instance, popular among youngsters artists and singers, parties, humor, etc.

Advertising is most often organized in the form of sponsorship of sport or music events. Online advertising is being developed - corporate sites, social networks (Facebook). Outdoor advertising began using innovative technologies, e.g. projections on the facades of public buildings at night.

It is also important to notice that alcohol advertising is very diverse and widespread. It uses a lot of channels (traditional and new media) and people can be exposed to alcohol advertisements a lot of times during an ordinary day.

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