

Monitoring the volume exposure to alcohol marketing

The AMMIE project – Alcohol Marketing monitoring in Europe

Tiziana Codenotti

EUCAM Training meeting, Warsaw 29-30 March 2012



Overview

- AMMIE project
- Overall monitoring activities
- Volume monitoring
- Key findings from volume monitoring
- Conclusions and recommendations



AMMIE Alcohol Marketing Monitoring in Europe

- 2009 - 2011
- Co-funded by the European Commission
- Aims**
 - To monitor alcohol marketing systematically
 - Monitor alcohol advertising independent from commercial interests
 - Test functioning of alcohol marketing regulations
 - Include young people in the evaluation of alcohol advertisements
 - Special attention to the protection of young people
- Monitoring**
 - 5 NGOs from Bulgaria, Denmark, Germany, Italy and the Netherlands
 - Based on a method developed by the Dutch institute for alcohol policy after years of monitoring experience
 - Monitoring volume and content of alcohol marketing



AMMIE deliverables

Country reports on:

1. Trends in alcohol marketing
2. Complaints and the complaining systems
3. Exposure of young people (volume)
4. Alcohol related sport sponsorship

European reports on:

1. Complaints and the complaining systems
2. Exposure of young people (volume)



AMMIE Summary European Report

Commercial promotion of drinking in Europe

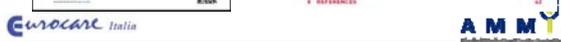


Key findings of independent monitoring of alcohol marketing in five European countries



INDEX

1. INTRODUCTION	6
1.1. Scope of alcohol marketing	6
1.2. Alcohol marketing regulations in European countries	6
1.3. Methodology of the monitoring system	6
1.4. The AMMIE project	6
2. TRENDS AND ENVIRONMENT IN ALCOHOL MARKETING	10
2.1. Alcohol	10
2.2. Beer	10
2.3. Wine	10
2.4. Spirits	10
2.5. Other alcoholic beverages	10
2.6. Alcohol consumption in Europe	10
2.7. Alcohol advertising in Europe	10
2.8. Alcohol marketing in Europe	10
2.9. Alcohol marketing in Europe	10
2.10. Alcohol marketing in Europe	10
3. THE VOLUME OF ALCOHOL ADVERTISING ON TELEVISION	14
3.1. Introduction	14
3.2. Methodology of the public consultation	14
3.3. Results of the public consultation	14
3.4. Public consultation on alcohol advertising	14
3.5. Public consultation on alcohol advertising	14
3.6. Public consultation on alcohol advertising	14
3.7. Public consultation on alcohol advertising	14
3.8. Public consultation on alcohol advertising	14
3.9. Public consultation on alcohol advertising	14
3.10. Public consultation on alcohol advertising	14
3.11. Public consultation on alcohol advertising	14
3.12. Public consultation on alcohol advertising	14
3.13. Public consultation on alcohol advertising	14
3.14. Public consultation on alcohol advertising	14
3.15. Public consultation on alcohol advertising	14
3.16. Public consultation on alcohol advertising	14
3.17. Public consultation on alcohol advertising	14
3.18. Public consultation on alcohol advertising	14
3.19. Public consultation on alcohol advertising	14
3.20. Public consultation on alcohol advertising	14
3.21. Public consultation on alcohol advertising	14
3.22. Public consultation on alcohol advertising	14
3.23. Public consultation on alcohol advertising	14
3.24. Public consultation on alcohol advertising	14
3.25. Public consultation on alcohol advertising	14
3.26. Public consultation on alcohol advertising	14
3.27. Public consultation on alcohol advertising	14
3.28. Public consultation on alcohol advertising	14
3.29. Public consultation on alcohol advertising	14
3.30. Public consultation on alcohol advertising	14
3.31. Public consultation on alcohol advertising	14
3.32. Public consultation on alcohol advertising	14
3.33. Public consultation on alcohol advertising	14
3.34. Public consultation on alcohol advertising	14
3.35. Public consultation on alcohol advertising	14
3.36. Public consultation on alcohol advertising	14
3.37. Public consultation on alcohol advertising	14
3.38. Public consultation on alcohol advertising	14
3.39. Public consultation on alcohol advertising	14
3.40. Public consultation on alcohol advertising	14
3.41. Public consultation on alcohol advertising	14
3.42. Public consultation on alcohol advertising	14
3.43. Public consultation on alcohol advertising	14
3.44. Public consultation on alcohol advertising	14
3.45. Public consultation on alcohol advertising	14
3.46. Public consultation on alcohol advertising	14
3.47. Public consultation on alcohol advertising	14
3.48. Public consultation on alcohol advertising	14
3.49. Public consultation on alcohol advertising	14
3.50. Public consultation on alcohol advertising	14
3.51. Public consultation on alcohol advertising	14
3.52. Public consultation on alcohol advertising	14
3.53. Public consultation on alcohol advertising	14
3.54. Public consultation on alcohol advertising	14
3.55. Public consultation on alcohol advertising	14
3.56. Public consultation on alcohol advertising	14
3.57. Public consultation on alcohol advertising	14
3.58. Public consultation on alcohol advertising	14
3.59. Public consultation on alcohol advertising	14
3.60. Public consultation on alcohol advertising	14
3.61. Public consultation on alcohol advertising	14
3.62. Public consultation on alcohol advertising	14
3.63. Public consultation on alcohol advertising	14
3.64. Public consultation on alcohol advertising	14
3.65. Public consultation on alcohol advertising	14
3.66. Public consultation on alcohol advertising	14
3.67. Public consultation on alcohol advertising	14
3.68. Public consultation on alcohol advertising	14
3.69. Public consultation on alcohol advertising	14
3.70. Public consultation on alcohol advertising	14
3.71. Public consultation on alcohol advertising	14
3.72. Public consultation on alcohol advertising	14
3.73. Public consultation on alcohol advertising	14
3.74. Public consultation on alcohol advertising	14
3.75. Public consultation on alcohol advertising	14
3.76. Public consultation on alcohol advertising	14
3.77. Public consultation on alcohol advertising	14
3.78. Public consultation on alcohol advertising	14
3.79. Public consultation on alcohol advertising	14
3.80. Public consultation on alcohol advertising	14
3.81. Public consultation on alcohol advertising	14
3.82. Public consultation on alcohol advertising	14
3.83. Public consultation on alcohol advertising	14
3.84. Public consultation on alcohol advertising	14
3.85. Public consultation on alcohol advertising	14
3.86. Public consultation on alcohol advertising	14
3.87. Public consultation on alcohol advertising	14
3.88. Public consultation on alcohol advertising	14
3.89. Public consultation on alcohol advertising	14
3.90. Public consultation on alcohol advertising	14
3.91. Public consultation on alcohol advertising	14
3.92. Public consultation on alcohol advertising	14
3.93. Public consultation on alcohol advertising	14
3.94. Public consultation on alcohol advertising	14
3.95. Public consultation on alcohol advertising	14
3.96. Public consultation on alcohol advertising	14
3.97. Public consultation on alcohol advertising	14
3.98. Public consultation on alcohol advertising	14
3.99. Public consultation on alcohol advertising	14
3.100. Public consultation on alcohol advertising	14
4. CONCLUSIONS	36
5. RECOMMENDATIONS	40
6. REFERENCES	43



The volume of alcohol advertising on television

- Volume matters!

Conclusion by the Science Group of the Alcohol and Health Forum:

“Based on the consistency of findings across the studies, the confounders controlled for, the dose response relationships, as well as the theoretical plausibility and experimental findings regarding the impact of media exposure and commercial communications, it can be concluded from the studies reviewed that **alcohol marketing increases the likelihood that adolescents will start to use alcohol, and to drink more if they are already using alcohol.**” (2010, p.5)



1

Regulations on the volume of alcohol advertising on TV

- Proportional standard
- Watershed (time ban)
- Product bans
- Alcohol advertising bans

Eurocare Italia



Proportional standard

- Embedded in voluntary rules of the economic operators
- Official aim: to protect young people from over-exposure
- 70% of the alcohol ads' audience is 18+

Eurocare Italia



Other volume restrictions: time bans and product restrictions

Embedded in statutory regulations (laws)

Bulgaria: no indirect advertising before 22.00h and tv spirit prootion restricted

Netherlands: ban from 6.00-21.00h but sponsorship still permitted

Italy: restrictions from 16.00-21.00h limited to spirits (sponsorship still permitted)

Eurocare Italia



Monitoring the volume – The AMMIE method

- 5 countries monitoring only May and October 2010
- Data bought from Nielsen Media
- Top 3 Tv channels watched most by young people
- Characteristics, levels of exposure, adherence to audience threshold and watershed (and possible effects of changes in both)
- Common protocol used by all 5 countries
- Results reviwed by STAP and by John Hopkins Bloomberg School of Public Health USA

Eurocare Italia



Questions to be answered

- What are the characteristics of the advertisements broadcasted in May and October 2010?
- How many exposures to alcohol advertising occurred in May and October 2010?
- How much exposure do different age groups have to alcohol advertisements?
- Which brands are generating the greatest youth (over)exposure?
- Is a 30% threshold effective to protect large numbers of minors from being exposed to alcohol advertising?
- What would an alternative, more 'proportional' and protective threshold look like?
- What could be the possible effect of different time bans on television with respect to the exposure of minors?

Eurocare Italia



Volume exposure of young people to alcohol marketing on TV

- **Total 11,122 alcohol marketing**
- **Higher numbers in May**
- **Saturday and Sunday most popular days**
- **Peak hours 20.00 – 1.00h**
- **Beer most advertised product in all countries (59%) except Denmark with 42% of spirits ads**
- **70 different alcohol producers with 134 alcohol brands**

Eurocare Italia



Advertising exposure among minors (in selected period in top-3 channels):

In BU, 36 million times a minor saw an advertisement;
 DK: 10 million
 GE: 610 million
 IT: 260 million
 NL: 54 million

Total of 970 million times a minor saw an alcohol ad.
 This is on average 44 ads per minor (in May and October 2010).

Advertising exposure among minors (in selected period in top-3 channels):

Table 2 - Comparing the exposure of different age groups to alcohol advertisements in May and October 2010

Groups compared		BU	DK	GE	IT	NL
at risk / total adults	GRP Ratio	0,57	0,65	0,92	0,81	0,71
	% Overexposing ads	21,7%	29,1%	42,2%	35,0%	27,0%
	% Exposure from overexposure	37,2%	52,4%	66,7%	54,2%	44,3%
at risk / young adults	GRP Ratio	0,85	0,65	0,67	0,97	0,78
	% Overexposing ads	31,8%	23,7%	15,2%	37,0%	30,5%
	% Exposure from overexposure	57,9%	38,6%	21,9%	59,9%	48,5%

*GRP ratio = Gross Rating Points ratio: the total number of GRPs for age group 12-17 divided by the total number of GRPs for the age group 18+ resp. 18-34. A GRP ratio > 1 is an indication that youth are being exposed to more advertising per capita than young adults. Source: Nielsen, 2010.

Thresholds in exposure to alcohol advertising

Table 4 - Number of violations of the 30%* threshold in May and October 2010

	BU	DK	IT	NL
violations	17	427	10	56
brands	9/25	24/30	5/23	17/20
channel	bTV Action (PRO.BG) - 41%	MTV - 63%	canale 5 - 0%	RTL 4 - 0%
	Diema Family-35%	TV 2 - 18%	Italia 1 - 100%	RTL 5 - 96%
	Nova - 24%	TV3 - 19%	rai 1 - 0%	SBS 6 - 4%

Table 4: The number of violations of the 30%-threshold in May and Oct 2010 per channel. * For the Netherlands a 25% threshold is taken. The number of violations is based on data from the Top 3 TV channels most often watched by 13-17 year olds (NL 12-17 year olds). Therefore, the total number of violations in these months will probably be higher than depicted here. Source: Nielsen, 2010.

Percentages vs absolute numbers

Table 3 - Comparing percentages with absolute numbers

Brand	Program	Day and date	Spot time	% of viewers aged 4-17	N aged 4-17	GRP* 4-17
Forst Beer	Viva Las Vegas	Mon 03/05/10	20.24.50	27,8%	662.655	8,4
Moretti Ballo d'Oro Beer	Super Parties	Sun 30/05/10	7.36.04	33,3%	33.902	0,4
Montenapoli Amaro	Motociclismo	Fr 29/10/10	25.32.33	6,4%	16.144	0,2
Martini Rosato	Rai Sport	Wed 05/05/10	20.30.35	6,4%	472.330	6,0

Similar high percentage (± 30%) and large difference in absolute numbers
 Low percentages (< 25%) and large difference in absolute numbers

Conclusion: Proportional standard

- Should prevent overexposure
- Should consider at risk population (13-17 year olds):
European Union 27 countries
5,5% of audience

Conclusion: Proportional standard

Figure 24:
 The percentage of reduction in exposure to alcohol advertising (13-17 GRPs) when introducing a proportional standard (6% in Bulgaria and Germany, 8% in Denmark and the Netherlands, and 5% in Italy). In all outcomes an entire compensation for the total number of adult GRPs lost due to the policy has been taken into account (GRPs = Gross Rating Points; a standard to measure per capita exposure to advertising). * Age group in the Netherlands is 12-17 years of age. Source: Nielsen, 2010.

Conclusion: Proportional standard

- Monitoring is crucial and should be done by independent bodies;
- But data are expensive and not always available for non-economic parties
- By using after-the-fact data, young people are already exposed.
- Is regulated by voluntary rules without strong sanctions taken

Eurocare Italia

AMMIE

Effects watershed (time bans):

- Aims to prevent exposure to many young people
- Easier to monitor
- But alcohol industry is reactive

Experience in the Netherlands:

- 2007-2010: number of ads after 9pm tripled (from 7692 commercials to 23411 commercials).
- Adult advertising exposure: + 57.3%
- Adolescent exposure + 61.7% (diff= +4.4%)
- Children: +5.4% (diff= -51.9%)

Eurocare Italia

AMMIE

Simulation of expected effects of watersheds:

- Shifts in GRPs after introduction time bans.
- Compensating for loss in adult GRPs.
- Different scenarios tested in different countries.

Eurocare Italia

AMMIE

Possible effects of watersheds

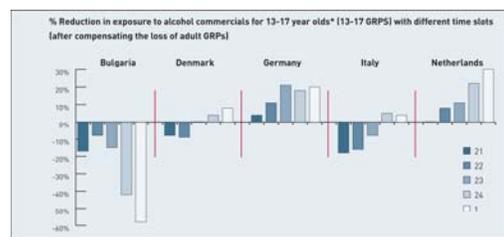


Figure 25: The percentage of reduction in exposure to alcohol advertising (13-17 GRPs) at different time slots. In all outcomes an entire compensation for the total number of adult GRPs lost due to the policy has been taken into account (GRPs = Gross Rating Points, a standard to measure per capita exposure to advertising). * Age group in the Netherlands is 12-17 years of age. Source: Heineken, 2012

Eurocare Italia

AMMIE

Conclusions

- Current volume restrictions (i.e. proportional standards) in SR are ineffective.
- Also, more stringent proportional standards (e.g. 8% instead of 30%) have important practical limitations (independent monitoring, lack of data, after the fact monitoring, lack of effective sanctions).
- Watersheds are easier implemented and to be enforced into legislation, but:
Alcohol advertising sector changes their advertising strategy when being confronted with volume restrictions.

Eurocare Italia

AMMIE

Recommendations (where TV alcohol marketing is allowed)

1. Proportional standard
 - prevents overexposure
 - Should consider at risk population (13-17 year olds)
 - EU-27 -> 5,5% of audience
2. Time ban
 - Prevents exposure of large numbers of young people
 - Easy to monitor
 - At least 06.00 - 23.00h recommended

Eurocare Italia

AMMIE

FINAL RECOMMENDATION

Complete TV ban of alcohol marketing
(French Loi Evin)



Moretti Beer and football: "The real football connoisseurs drink Moretti Beer". Source: www.moretti.it

THANK YOU