

# Alcohol Marketing Regulation And Public Health

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Pan American  
Health  
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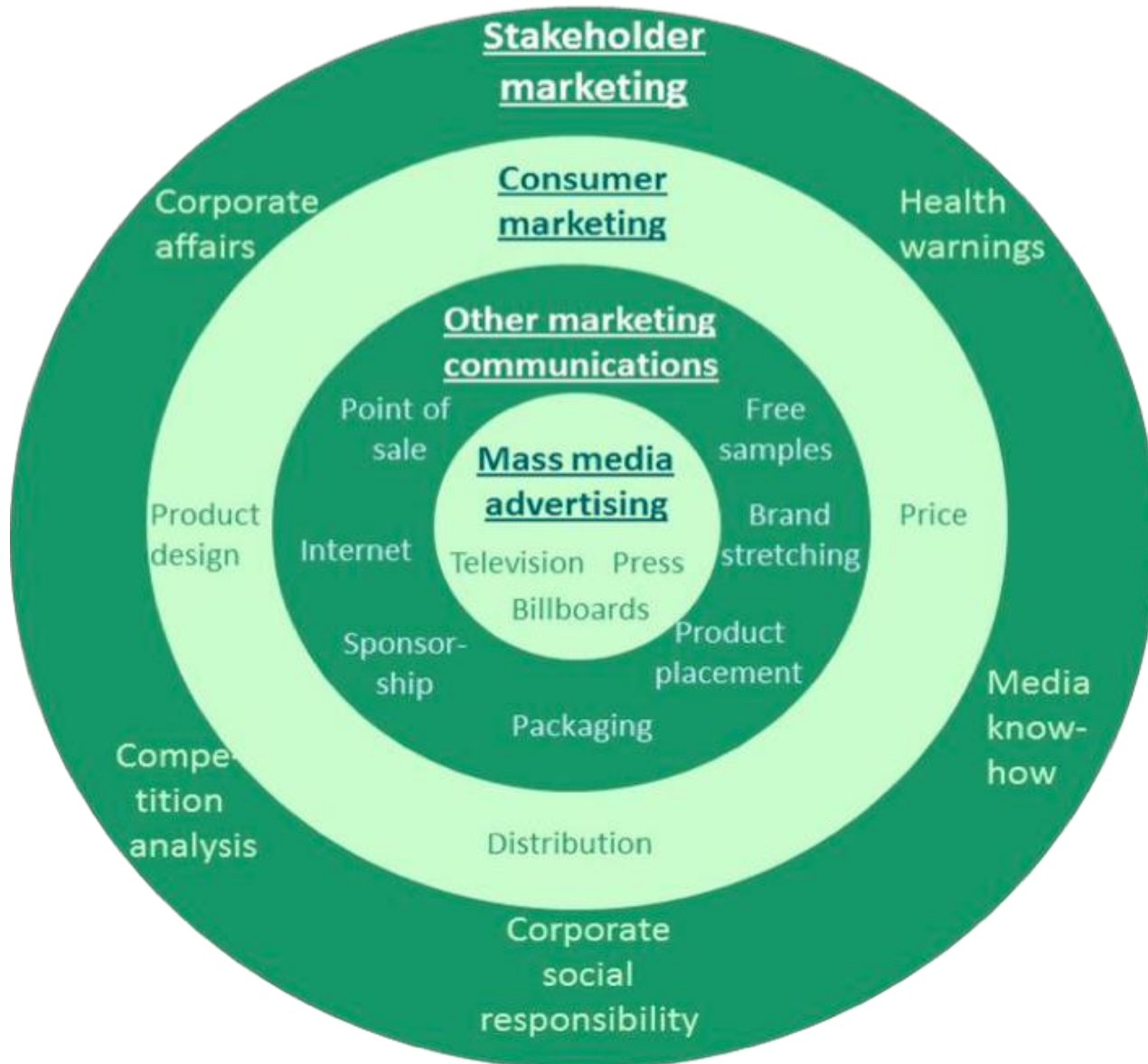


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Americas

# THE EVIDENCE

Part I

# What is marketing?



# Extent of Global Alcohol Marketing

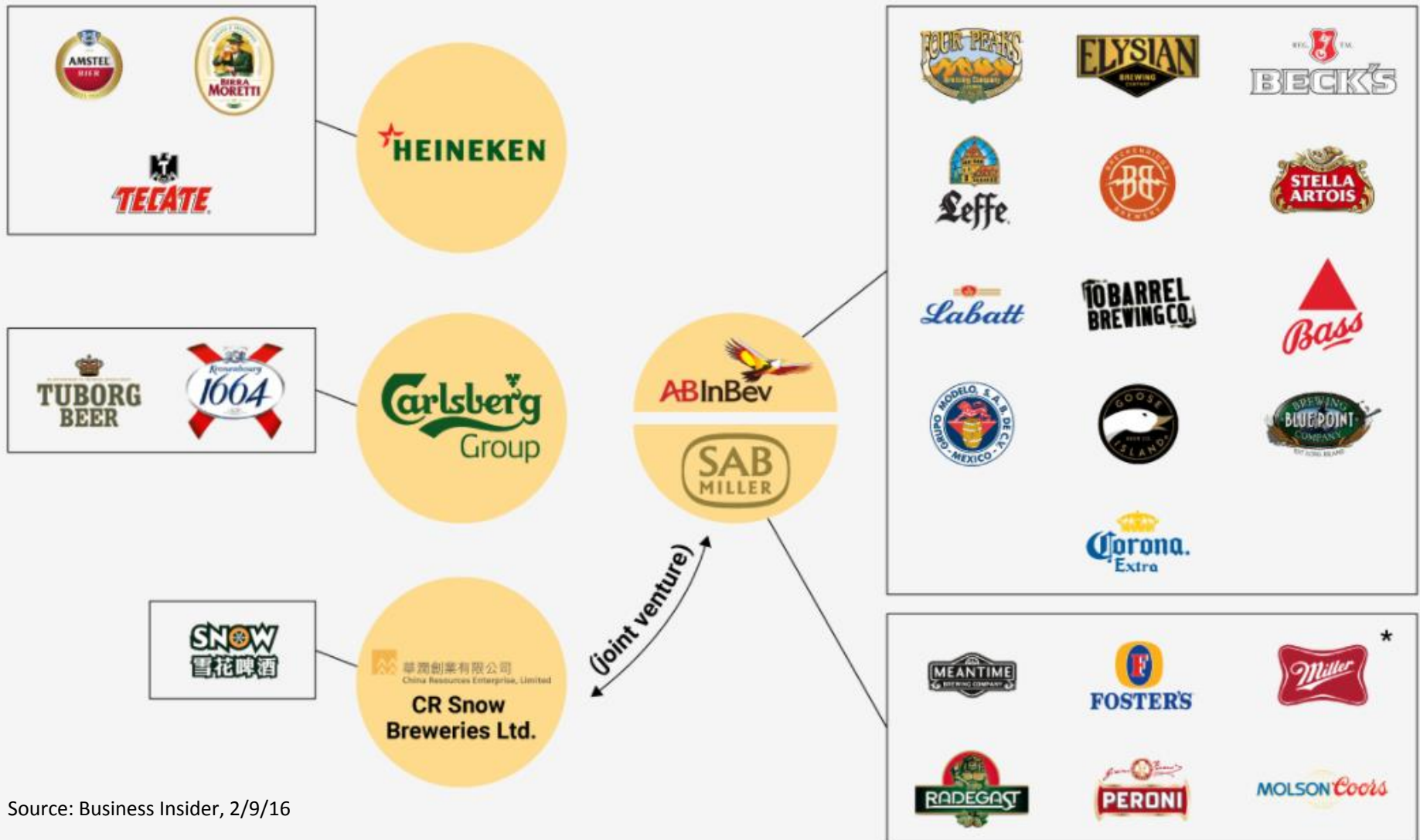
- Five companies alone reported US \$5.5 billion in measured marketing (just traditional advertising) spending in 2010
- These five are among the top 100 marketers in the world
- Alcohol companies are among the top ten advertisers in numerous countries, including Japan, the Philippines, and Singapore

# Concentration in the global beer market 1979-2012

Corporation	Headquarters	Global Market Share	
		1979/80	2012
AB/Inbev	Belgium	6.5% (1) (AB)	22.4% (1)
SABMiller	UK	4.8% (2-Miller),	13.2% (2)
Heineken NV	Netherlands	2.8% (4)	9.3% (3)
Carlsberg Breweries A/S	Denmark	*	6.6% (4)
China Resources Enterprise Ltd.	China	*	5.8% (5)
Tsingtao Brewery Col. Ltd.	China	*	4.3% (6)
Molson Coors Brewing Co.	USA	.8% (21-Molson) 1.9% (8-Coors)	3.4% (7)
Beijing Yanjing Beer Group Corp.	China	*	3.0% (8)
Kirin Brewery Co Ltd	Japan	3.1% (3)	2.7% (9)
Asahi Group Holdings	Japan		2.0% (10)
<b>Total market share of top ten companies</b>		<b>28.0%</b>	<b>72.6%</b>

Source: Impact Databank

# 5 BEER MAKERS OWN MORE THAN 50% OF THE WORLD'S BEER



# Concentration in the global spirits market 2006-2013

Company	Headquarters	2006	2013
Diageo	United Kingdom	10.8%	21.1%
Pernod Ricard	France	8.3%	10.6%
Beam Suntory	Japan	3.7%	4.5%
Bacardi Ltd	Bermuda	3.7%	3.0%
Russian Standard Corp	Russia	*	2.2%
Allied Blenders and Distillers	India	*	2.0%
Gruppo Campari	Italy	1.7%	2.0%
Brown-Forman Beverages Worldwide	United States	1.8%	2.0%
Group La Martiniquaise – Bardinet	France	*	1.9%
Sazerac Co. Inc.	United States		1.8%
<b>TOTAL TOP 10</b>		<b>42.3%</b>	<b>51.2%</b>

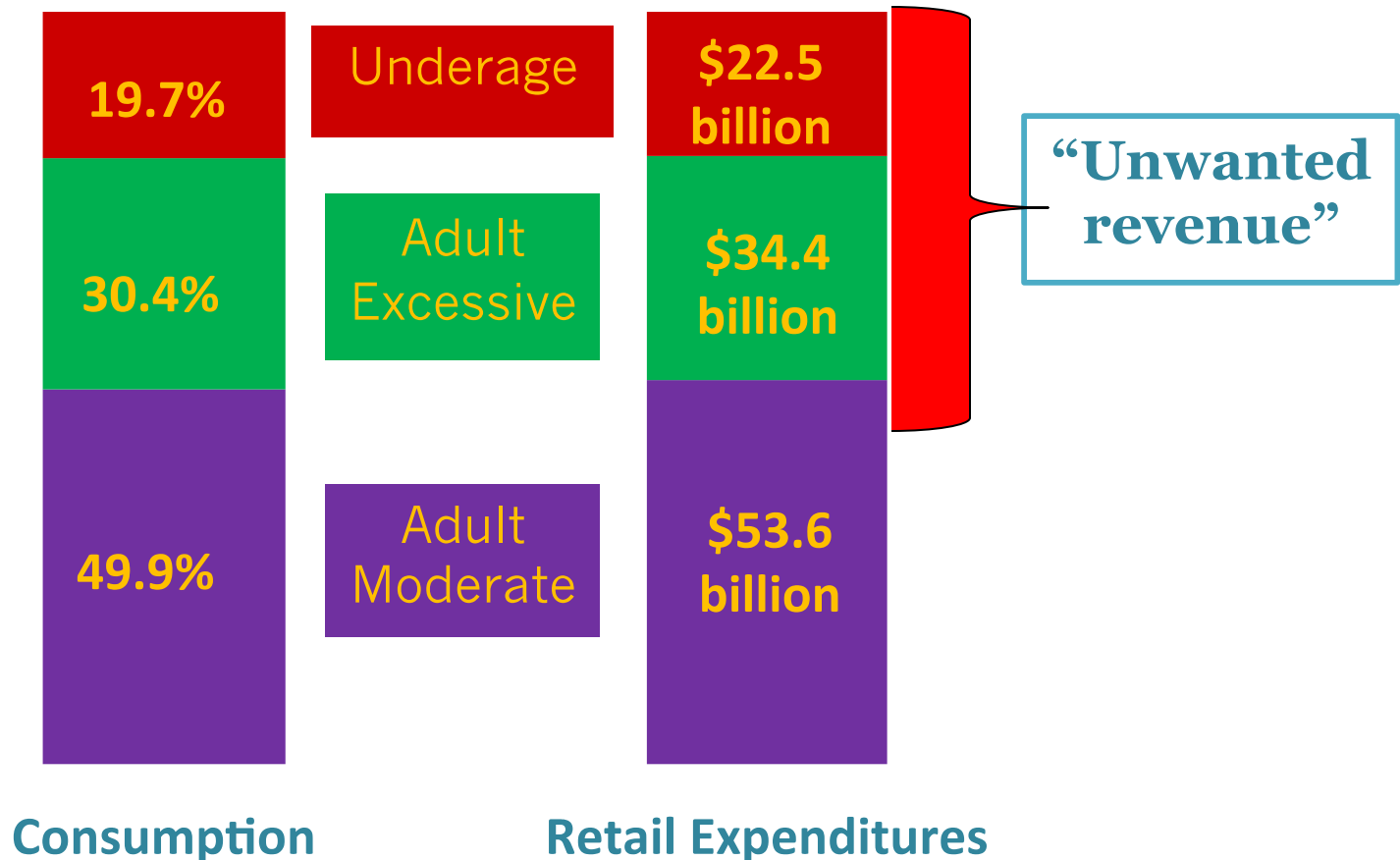
Source: Impact Databank

# Impact of industry concentration

- Concentration permits oligopoly profit-taking.
- This profit-taking has two key outcomes:
  - Alcohol companies can afford to spend heavily on marketing, which then keeps new players from being able to compete with the existing big ones (in economics, this is known as creating “barriers to entry” in the marketplace).
  - Alcohol companies can afford to spend heavily on lobbying.



# Alcohol Industry “Unwanted” Consumption And Sales, 1999, USA



# Examples of Alcohol Marketing







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# Antioxidant beer

**INSTANT ENERGY!** 24 Fresh Ideas to Recharge Your Mind and Body

Special Double Issue Just \$3.50

# fitness

mind, Body + Spirit

**BURN MORE CALORIES**  
The New Science Behind A Faster Metabolism

**Pretty Hair, Glowing Skin**  
Solutions for a Gorgeous Summer

**Slim. Sexy. Confident!**  
Your Fast Track to Tight Abs, Butt and Thighs


**Stick-With-It Exercise Strategies**

**Eat Your Veggies**  
7 Tasty, Satisfying Dishes

**PIZZA, CHIPS, ICE CREAM...**  
Our Guilt-Free Shopping List, p.158

Join the Motherboard!  
OPEN FOR DETAILS

JULY/AUGUST 2010 \$3.50  
FITNESSMAGAZINE.COM



## Beer With Benefits

What's hot in ale? Tea. Coffee has been used to flavor porters and stouts, and now java's cousin is getting in on the action. Sure, you'll get more bang for your antioxidant buck from fruits and veggies, but, hey, every little bit counts. Wondering what the latest combo of two brews in one tastes like? We chose our top three earls gone wild. —Sarah D'Angelo



### < BluCreek Zen IPA

The India pale ale-green tea mash-up was the fave. "It's refreshing—similar to a traditional IPA," says senior fitness editor Lindsey. (blucreek.com)

### MateVeza Yerba Mate IPA >

Testers enjoyed the fruity flavor of this brew, made with South American yerba maté. Special projects editor Caroline put it simply: "Yummy!" (mateveza.com)

### < Ineeka Organic Green Tea Bier

This ginger-tinged Belgian-style ale tastes more like herbs than hops. "A good option for people who don't love the flavor of beer," says associate beauty editor Ayren. (ineeka.com)





# Advertising: Internet

**STAG CUEBALL 6**  
No Red Cards. No Fouls. No Penalties. A MAN'S GAME

Get in the game when the HUGEST pool table you will ever see becomes a football field. We talking so big that we have to use footballs instead of your normal small pool balls, and it's even more action because you'll be up top using your feet to pocket the balls. Remember - No hands allowed.

On Sunday June 2nd we are in Maracas between the hours of 11am and 5pm at

- **Uncle Sam's Bar**

Buy your Stag, Play Stag Cueball and Win BIG Prizes!

**STAG A MAN'S BEER**  
ESTABLISHED 1988

**I AM PASSION**

**I AM A WARRIOR**

Drink Carib Beer... Support your Warriors!

**Carib BEER**  
SUGA WARRIORS

With each of us, no matter how seemingly ordinary, lies the spirit of a hero, the character of a Warrior that emerges when the time is right to do battle against all odds, to win. I am a Warrior of Trinidad and Tobago filled with Passion for country. I discover the Warrior within myself. I pledge my support for country and team. The Soca Warriors will qualify for World Cup 2010, South Africa when we give passionate support to the team. Unleash your true spirit. Unleash your flag. Prepare for the battle ahead. Just drink. Stick. Support the Warrior.

© Carib Breweries Limited



Minister of Sport Anil Roberts & Carib Managing Director congratulate the owners of CaribGuineas



**STAG A MAN'S BEER**  
ESTABLISHED 1988

**COMMAND YUH CROWN & WIN THE ULTIMATE MANCATION IN BRAZIL**

**Win Like a MAN!**

Look under the specially marked **ULTIMATE MANCATION CROWN** and instantly win the adventure of a lifetime. **6 winners will each receive an all-expenses paid trip to Brazil.** Plus, there are several other instant prizes to be won!

**The ULTIMATE MANCATION includes:**

- Taking in a football game
- A Safari at its Wildest
- A Night Club Tour
- Hang Gliding

• Promotion runs from 5th August to 5th October 2013  
 • Winners of Mancation will receive their trip next year  
 • All entrants must be 18-years and over  
 • Must be in possession of a valid passport and visa  
 • Employees of Caribbean Development Company & CARIB BREWERY LIMITED, Colter Morrison Belgium Limited and their immediate families, are not allowed to enter

**STAG A MAN'S BEER**  
ESTABLISHED 1988

APPROVED BY THE NLCB



NON ALCOHOLIC NOVA SCHIN



# Kaiser



Kaiser. Sempre vai bem.  
R\$





ADVERTENCIA: EL ABUSO DE LA BEBIDA PERJUDICA LA SALUD. I.H.A.D.F.A



ADVERTENCIA: EL ABUSO DE LA BEBIDA PERJUDICA LA SALUD. I.H.A.D.F.A

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[https://www.facebook.com/photo.php?fbid=10152337050749847&set=pb.73491349846.-2207520000.1404935270.&type=3&src=https%3A%2F%2Fscontent-a.xx.fbcdn.net%2Fphotos-xf1%2Ft1.0-9%2F10154434\\_10152337050749847\\_642684781573071833\\_n.jpg&size=900%2C675](https://www.facebook.com/photo.php?fbid=10152337050749847&set=pb.73491349846.-2207520000.1404935270.&type=3&src=https%3A%2F%2Fscontent-a.xx.fbcdn.net%2Fphotos-xf1%2Ft1.0-9%2F10154434_10152337050749847_642684781573071833_n.jpg&size=900%2C675)



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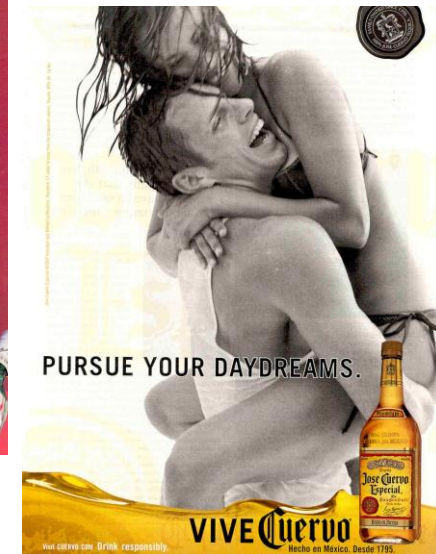
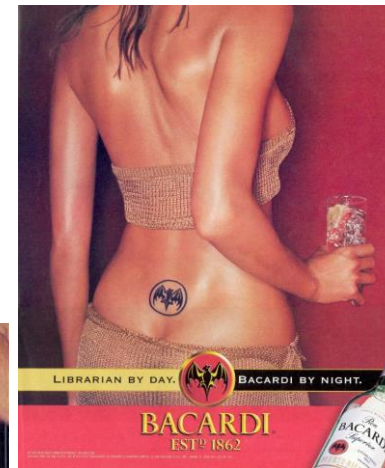
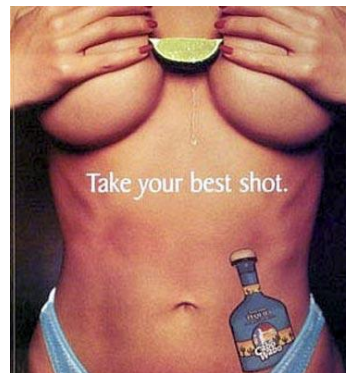
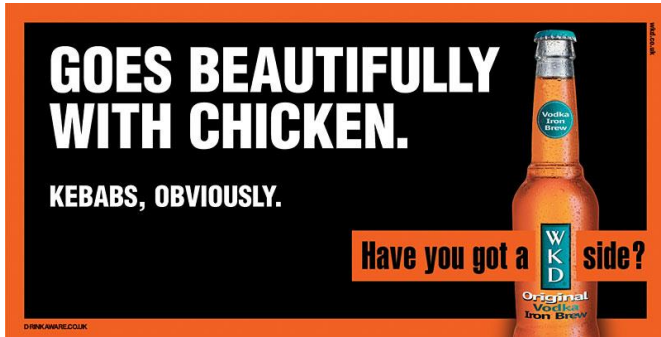


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# Examples of alcohol marketing code violations



Images sourced from  
Google Images



# ALCOHOL, BREAST CANCER and MARKETING

RECIPES & PAIRINGS  
SHERYL'S SELECTIONS

CHATEAU ST JEAN

ENTER FOR A CHANCE TO  
WIN A GIBSON GUITAR

NOTES OF HOPE  
WITH  
**SHERYL CROW**  
&  
CHATEAU ST JEAN

SHARE YOUR NOTES OF HOPE AND YOU COULD WIN  
AN AUTOGRAPHED Gibson GUITAR

ENTER NOW

FOR EVERY BOTTLE OF CHATEAU ST. JEAN YOU  
BUY THIS OCTOBER, \$1 WILL BE DONATED  
TO HELP FIND A CURE FOR BREAST CANCER

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OF RELAXED ELEGANCE



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Pink Chardonnay you purchase  
in October, we will donate \$1.00  
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Thank you for your support.  
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SAVE THE TA-TAS.

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WOK PINK YOUR DRINK WOK

CHAMBORD

LIKE OR SHARE THIS POST AND WE'LL DONATE  
\$1 TO A NATIONAL BREAST CANCER CHARITY.

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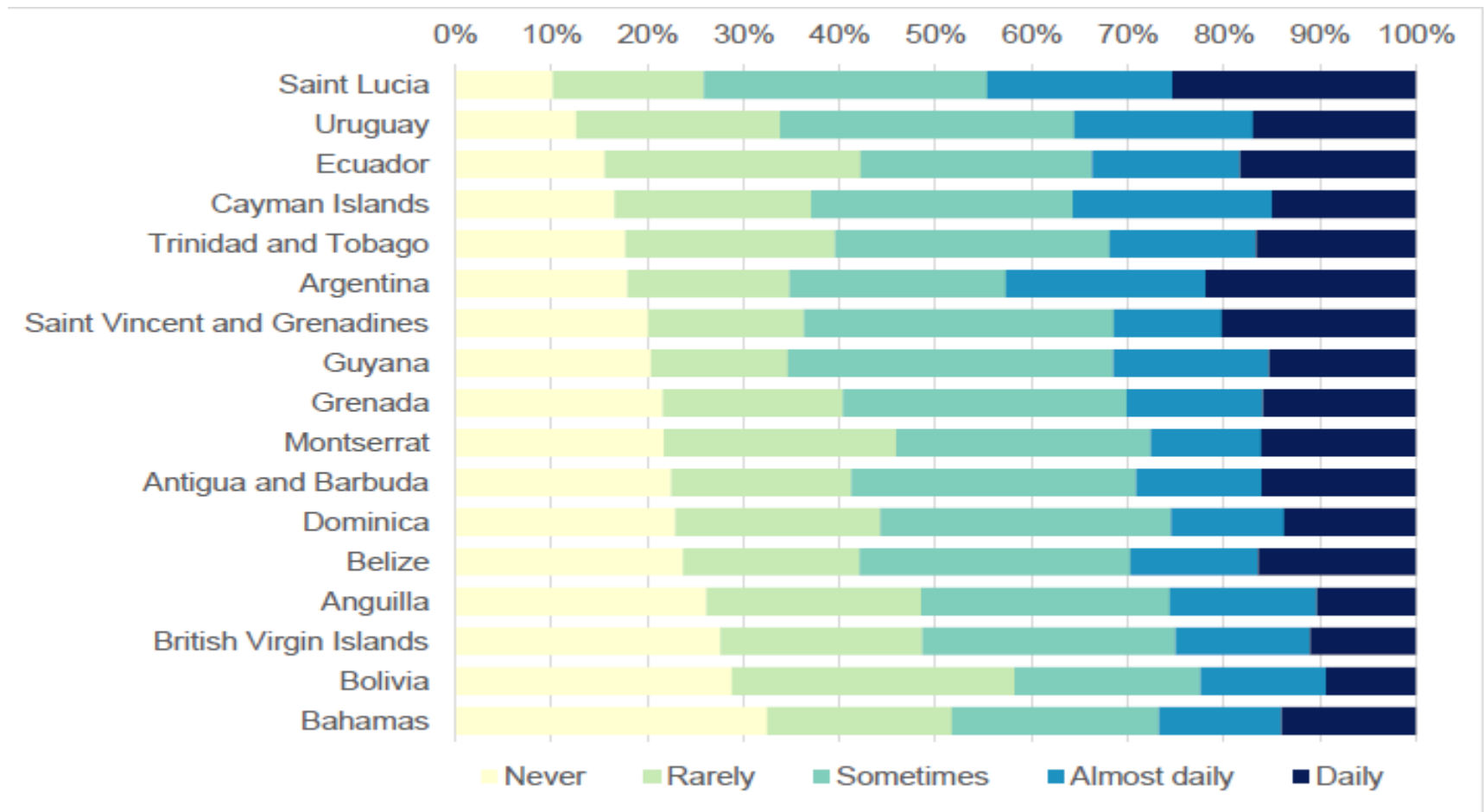
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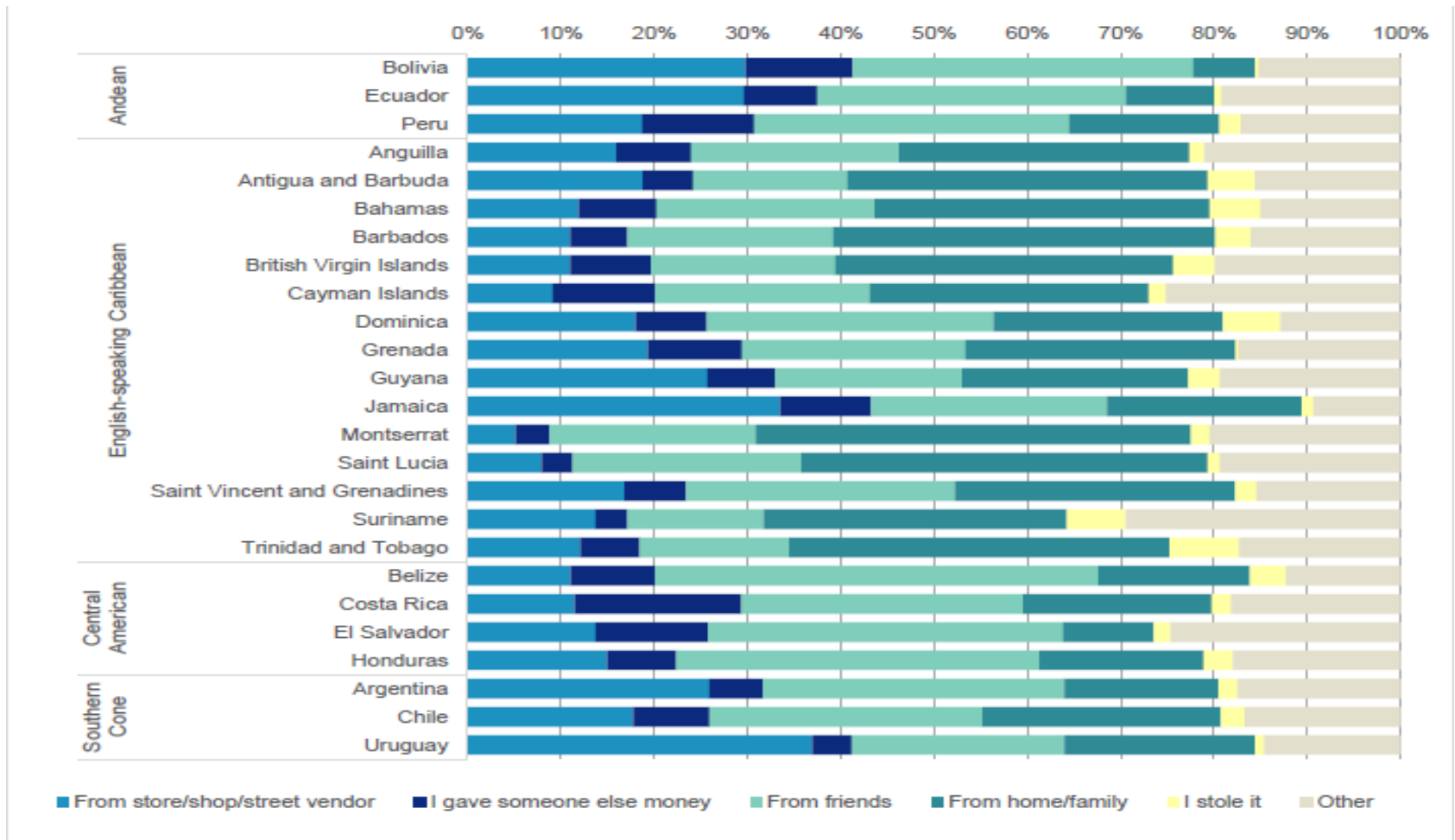
# GSHS Data Analysis- AMRO

Overall 20% of students exposed to alcohol advertisement daily or almost daily

Associated with an about **2-3** increased risk of current alcohol use and at least monthly heavy drinking

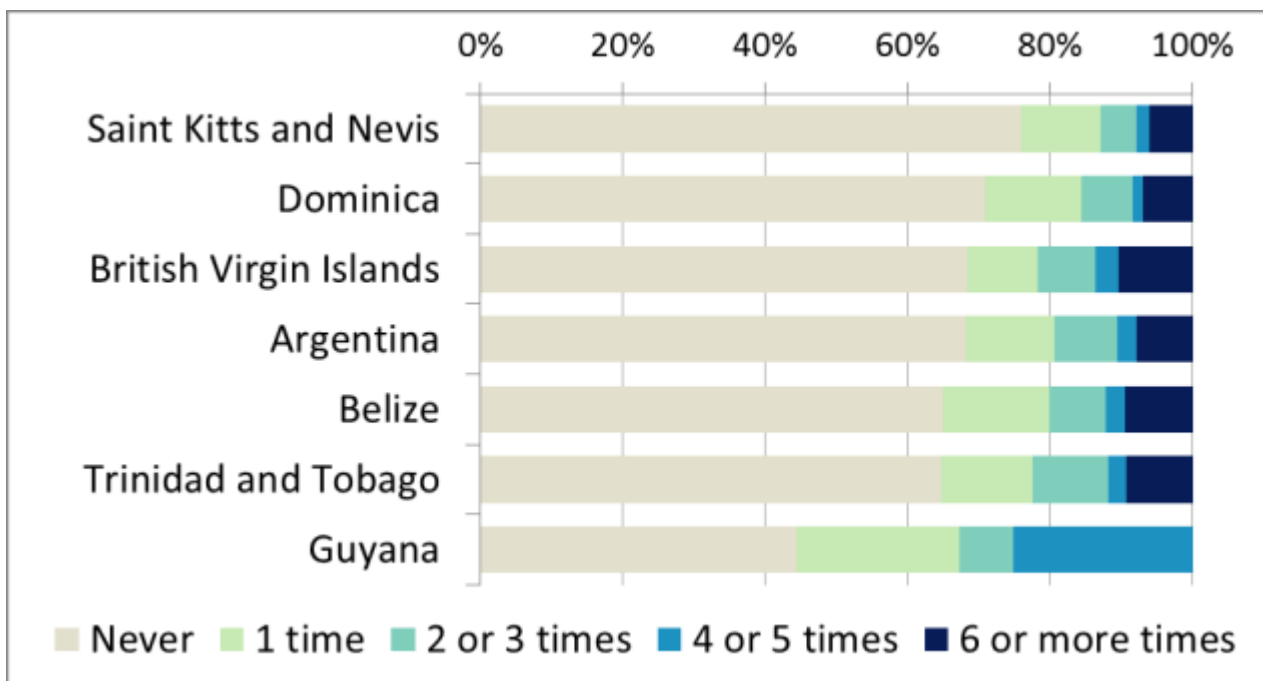


- The three most common ways to obtain alcohol were from **friends (25%), the family/at home (30%), and a shop (25%)**.
- Obtaining alcohol from a **shop** was associated with nearly **3 fold increased risk** of at least monthly heavy drinking



# Riding in a car driven by someone under the influence of alcohol (past 30 days)\*

Current alcohol use associated with **2.5 higher risk** of riding in a car driven by someone under the influence of alcohol



\* Among those who were in a vehicle in the past 30 days

From: Trends in Tobacco and Alcohol Brand Placements in Popular US Movies, 1996 Through 2009

JAMA Pediatr. 2013;167(7):634-639. doi:10.1001/jamapediatrics.2013.393

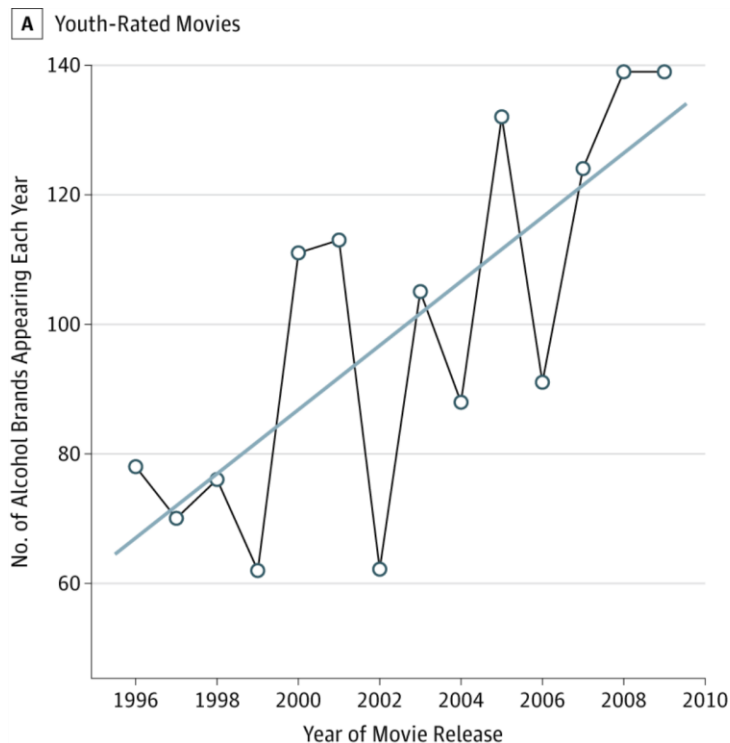
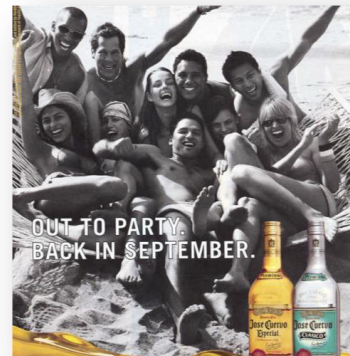
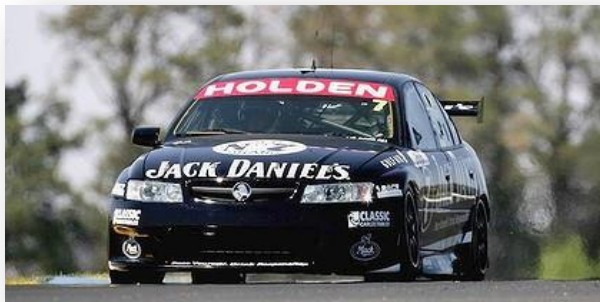


Figure Legend:

Trends of Movie Alcohol Brand Counts Trends of movie alcohol brand counts from (A) youth-rated and (B) R-rated movies, with a linear trend line. For youth-rated movies, slope = 4.97 (P = .002); for R-rated movies, slope = -0.99 (P = .52).

# Alcohol Advertising and Youth: Published systematic reviews

- **Anderson et al. 2009 (*Alcohol and Alcoholism*):**
  - 13 longitudinal studies following up more than 38,000 young people
  - “Longitudinal studies consistently suggest that exposure to media and commercial communications on alcohol is associated with the likelihood that adolescents will start to drink alcohol, and with increased drinking amongst baseline drinkers”
- **Smith and Foxcroft 2009 (*BMC Public Health*):**
  - 7 cohort studies following up more than 13,000 young people aged 10 to 26 years
  - “...data from prospective cohort studies suggest there is an association between exposure to alcohol advertising or promotional activity and subsequent alcohol consumption in young people. Inferences about the modest effect sizes found are limited by the potential influence of residual or unmeasured confounding.”

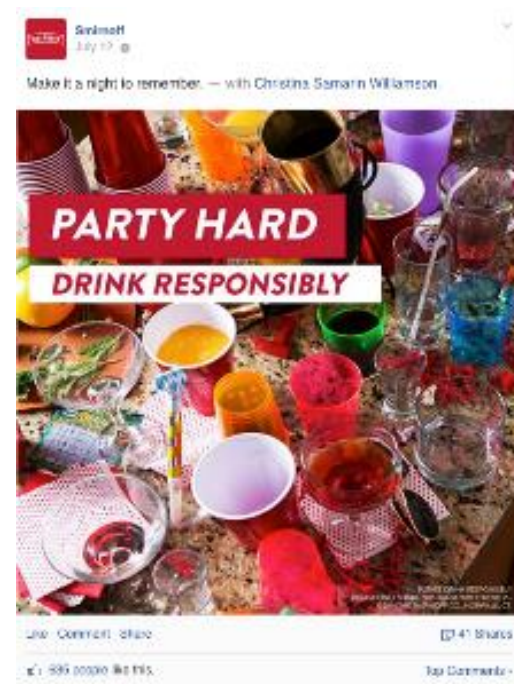


Anderson et al., *Alcohol Alcohol*  
2009;44:229-43



# New systematic review (Jernigan et al., *Addiction*)

- **12 longitudinal studies**
  - All found significant associations between exposure to, awareness of, engagement with and/or receptivity to alcohol marketing at baseline, and initiation of alcohol use, initiation of binge drinking, drinking in the past 30 days, and/or alcohol problems at follow-up
  - Strongest links to progression to binge/hazardous drinking
- **Mechanisms of influence:**
  - Exposure
  - Receptivity
    - Liking an ad
    - Ability to recall ads
    - Participation in marketing
  - Expectancies
  - Brand recognition



# Alcohol industry in digital and social media

- Lobstein et al. narrative review (*Addiction*):
  - Numerous examples of voluntary code violations
  - Evidence of high levels of exposure of young people
  - All cross-sectional
- CAMY survey (*ACER*)
  - Pilot survey of 1192 youth (13-20), 1124 adults (21+)
  - Youth nearly twice as likely to report exposure to alcohol ads in digital media as adults
  - The younger the age group, the more likely they were to report lying about their age on the internet





# Greater ad exposure predicts youth alcohol consumption by brand

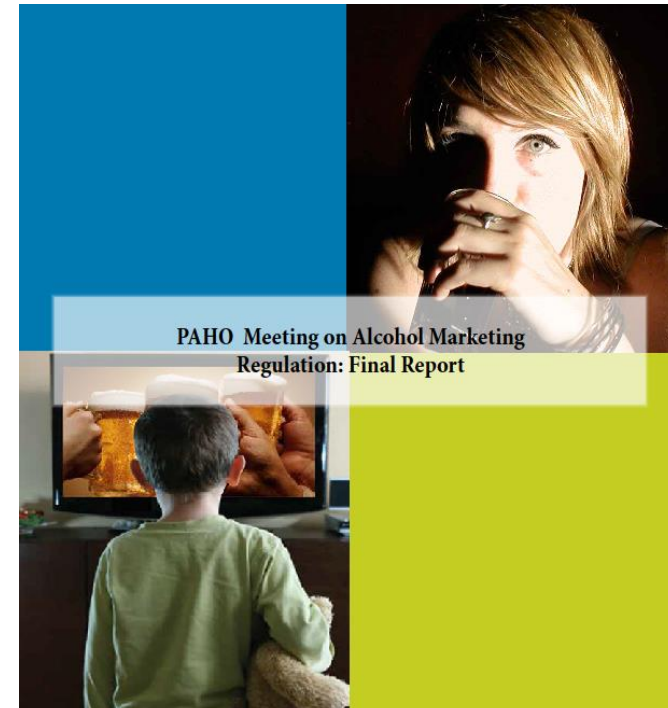
- Television: Youth were more than five times more likely to consume a brand if it advertised on national TV (population-level exposure), after controlling for brand price and overall market share
- Magazines: Youth were 36% more likely to consume brands that advertised in national magazines

Ross et al., AmJDAA 2016



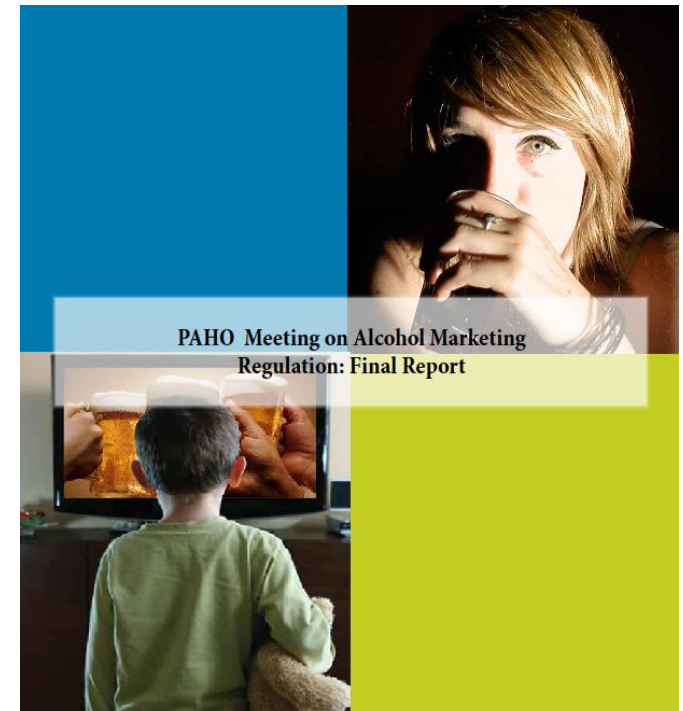
# PAHO Meeting on Alcohol Marketing Regulation, 2015

- Review of international literature on marketing impact on consumption and harms
- Current marketing practices in countries of the Region and policy responses
- Experiences from other fields regarding regulation of marketing
- Use of health related law and human rights principles for regulating alcohol marketing
- Review of the evidence of self-regulatory codes



# SUMMARY OF EVIDENCE

- Youth are more exposed than adults to alcohol advertising of various kinds
- Alcohol industry self-regulation is ineffective
- Youth exposure is generally associated with greater likelihood of early initiation and more drinking
- Brand exposure studies increase the size of the advertising effect
- Marketing increases purchase and consumption of alcohol



# *Addiction Supplement 2017*

<http://onlinelibrary.wiley.com/doi/10.1111/add.v112.S1/issuetoc>

- 12 articles on alcohol marketing, based on discussions held at the first PAHO meeting
- Systematic reviews and new research studies (World Cup 2014 study; Corporate Social Responsibility, Alcohol industry actions)
- Reviews related to vulnerability and Human Rights as they apply to alcohol marketing regulation

# Journal of Public Health, April 2017

**What does the alcohol industry mean by ‘Responsible drinking’? A comparative analysis**

<https://academic.oup.com/jpubhealth/article-abstract/doi/10.1093/pubmed/fox040/3111234/What-does-the-alcohol-industry-mean-by-Responsible?redirectedFrom=fulltext>

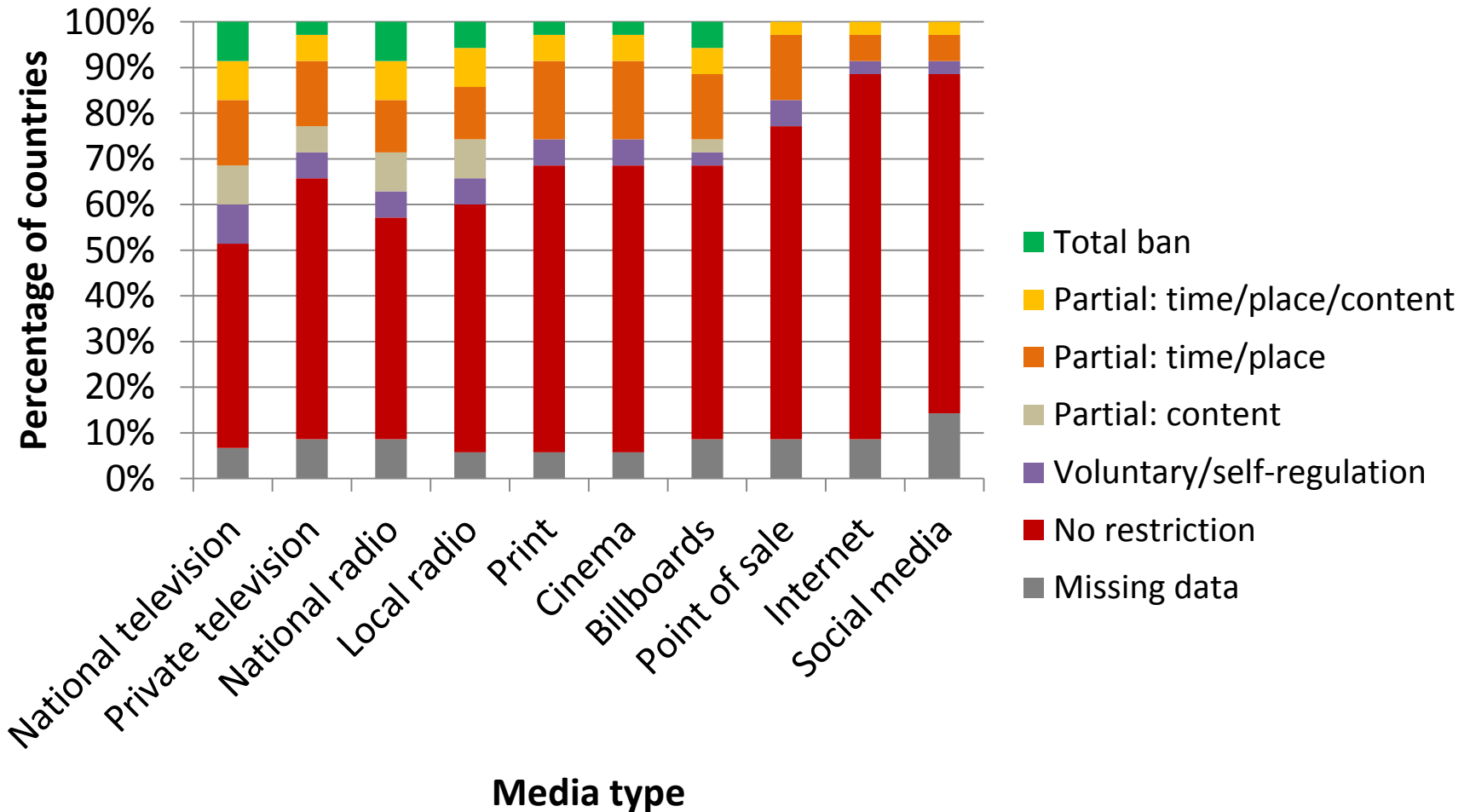
## **CONCLUSION**

Responsible drinking is a strategically ambiguous, industry-affiliated term that allows for multiple interpretations. Industry sources rarely reference government drinking guidelines in the context of responsible drinking, stressing individual responsibility and risk management. Public health practitioners should be aware of these distinctions, and use clear language regarding lower risk drinking.

# **The policy situation and the response**

Part II

# Restrictions on advertising for alcoholic beverages, by percentage of countries in the Americas, 2012



Region of the Americas, No. countries: 35

Source: <http://apps.who.int/gho/data/node.main.GISAH>

# REGULATORY CHALLENGES

- Insufficient regulatory capacity
  - Overlap of functions
  - Lack of clarity of functions
  - Regulatory process is not systematic
  - There are no mechanisms for
    - technical consultations;
    - social participation;
    - protect the right to health; transparency;
    - risk assessment;
    - management of conflicts of interest
    - financing legal work;
    - enforcement of laws;
    - monitoring implementation





# PAHO Technical Note 2017

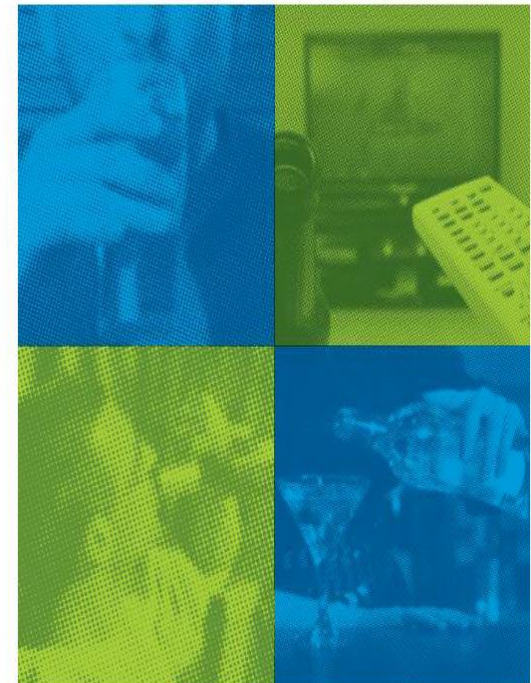
[http://www2.paho.org/hq/index.php?option=com\\_content&view=article&id=13130&Itemid=403](http://www2.paho.org/hq/index.php?option=com_content&view=article&id=13130&Itemid=403)

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## Alcohol Marketing Regulation



TECHNICAL NOTE



Background on Alcohol  
Marketing Regulation  
and Monitoring for the  
Protection of Public Health



# TECHNICAL NOTE 2017

- Provides detailed information to Member States on how to develop and strengthen their laws to protect and promote the health children and other groups in situation of vulnerability
- How to strengthen the regulatory authority to improve monitoring and enforcement of marketing laws
- How to effectively propose total prohibition or, when this is not possible, to propose partial but comprehensive laws
- Discuss in detail the use of instruments on human rights for effective alcohol marketing control



# Marketing policy options

- Total ban
  - Easiest to implement
  - Least expensive to implement
  - Research in well-resourced countries shows will have an effect, especially on youth drinking
  - Will generate significant alcohol industry opposition
    - Will claim hurts competition
    - In fact, current high marketing spend creates high barriers to entry that already hurt competition



# Marketing policy options

- Partial bans
  - Content-specific
  - Time-specific
  - Audience-specific
  - Beverage-specific
  - Medium- or channel-specific
  - Location-specific
  - Event-specific

# Alternatives to Regulation

- Counter-advertising
  - Marketing activity designed to decrease interest in a product
    - Often uses people's familiarity with the product ads to promote recall of the counter advertising message
  - Effective in tobacco control
  - May be effective in reducing youth alcohol use but little evidence and few experiments exist



# Alternatives to Regulation

- Mandated health and safety warnings
  - Most common in Region of the Americas
  - May appear on bottles and/or advertisements
  - Messages include:
    - “Consuming alcohol produces damage to health” (Panama)
    - “Drinking alcohol in excess is harmful” (Peru)
    - “Alcohol consumption is dangerous for your health and affects the family” (Ecuador)
    - “Do not drink and drive” (Kenya)

# Alcohol warning labels

- Experimental study evidence suggests may have an impact if placed on broadcast advertising
- On bottles, can you find it?
- Evidence is that alcohol warnings on bottles influence:
  - Attention or awareness
  - Recall
  - Judgment about danger or perceived risk
- *NO* effect on behavior

**NOT a good example!**





# Alcohol warning labels

Warnings on alcohol advertisements and containers, as a percentage of all reporting countries, by WHO region, 2008

WHO region	Warnings on advertisements			Warnings on alcohol containers		
	National (%)	Sub-national (%)	None (%)	National (%)	Sub-national (%)	None (%)
AFR	13	7	80	7	7	87
AMR	48	3	48	48	3	48
EMR	0	25	50	0	13	63
EUR	24	2	71	16	9	78
SEAR	11	0	78	22	11	67
WPR	6	12	76	12	6	76

<sup>a</sup> Totals may not equal 100% because figures are based on the countries reporting divided by the total number of countries in each region, rather than by the total number of countries reporting.



# Effective sanctions and deterrence systems

- Rely on monitoring systems
- Sanctions need to be large enough not just to be “cost of doing business”
  - E.g. at least 50% of cost of placing the advertisement
  - Can also pay for costs of NGO monitoring and complaint procedure – e.g. ANPAA and Loi Evin

# Additional Steps

- Supporting the documentation and exposure of code violations and/or marketing practices, especially when regulation is not in place or too weak
- Work on labeling and consumer's rights to receive appropriate information from what they drink



Type 3 "Drinking alcohol leads to unconsciousness and even death"



# Additional Steps

- Strengthen NGO capacity to advocate for alcohol policies
- Strengthen regulatory capacity of the health authority
- Promote population measures: all drinkers and many non drinkers are affected so everyone can contribute to the improving their health

# Virtual courses

<http://www.campusvirtualesp.org/>

AUDIT-SBI (Spanish, English)

ASSIST-SBI (Spanish, English)

Alcohol policy and public health (S,E)

Drug policy and public health (S, E)

Advocacy for Alcohol Policy (English, Portuguese)

Alcohol and Pregnancy (Portuguese)



*Thank You!*  
*monteirm@paho.org*



**Organización  
Panamericana  
de la Salud**



**Organización  
Mundial de la Salud**

OFICINA REGIONAL PARA LAS **Américas**