

This presentation will provide a different region's perspective by discussing the status of alcohol marketing policies in some countries in Europe and specifically the Baltic countries and informing on developments that could serve the Region of the Americas.



EUCAM:

Objectives :

- Collecting and disseminating of research and news about the impact and regulation of alcohol marketing and sponsoring
- Promoting the Monitoring of Alcohol Marketing
- Supporting activities and policies to restrict alcohol marketing and sponsoring

Members:























































Addiction Suisse (Switzerland), Alcohol & Society (Denmark), AV.OG.TIL (Norway), Eurocare Italia, Dutch Institute for Alcohol Policy STAP, IOGT-NTO (Sweden) and the National Tobacco and Alcohol Control Coalition (Lithuania).

Main tools of effective alcohol policy

To reduce the burden of harmful alcohol use, the World Health Organization (WHO, 2017) has recommended three “best buys,”

- **Enforcing bans on alcohol advertising,**
 - Restricting access to alcohol,
 - Increasing alcohol taxes
-
- Evidence suggests that comprehensive alcohol marketing restrictions are a cost-effective strategy for reducing the harmful use of alcohol if they are well enforced (Esser, Jernigan, 2018).

Global alcohol producers

Company	Category	HQ	2014 Revenue	Major Brands
	Beer	 Leuven, Belgium	£31bn	   
	Beer, Cider	 London, UK	£15bn	   
	Beer	 Amsterdam, Netherlands	£14bn	   
	Beer, Cider	 Copenhagen, Denmark	£6bn	   
	Spirits, Beer, Wine	 London, UK	£10bn	   
	Spirits, Wine	 Paris, France	£6bn	   
	Spirits	 Hamilton, Bermuda	£3bn	   
	Wine, Beer, Spirits	 Victor, NY, USA	£4bn	   
	Wine	 Modesto, CA, USA	£3bn	   

Source: Annual Reports, company websites and press reports (Please note: AB InBev and SAB Miller are treated as separate entities as the details of 'NewCo', their merged entity, remain unclear)

2016: AbinBev+SAB Miller: 43,6 bn; Heineken: 23 bn

Global Alcohol Producers

The growth of global alcohol corporations and concentration of the global alcohol market in the hands of a small number of companies is a public health concern because it may be associated with increased population-level exposure to alcohol marketing and product development (Esser, Jernigan, 2018)

Alcohol companies have enormous resources to devote to promoting their products. This is reflected in alcohol promotion becoming increasingly sophisticated, multi-faceted, and widespread, posing ever-greater challenges for regulators (Rossen et al, 2017).

Focus of the global producers

The alcohol industry is attracted to the economic development in emerging markets, as well as to groups that typically have high rates of alcohol abstention, including women and young people.

Drinkers:

- US and Europe: 70% of persons aged 15 and older consumed
- Eastern Mediterranean (7.4%), Southeast Asia (21.7%), and Africa (40.2%)



Research shows that..

- Alcohol promotion through traditional media channels leads to earlier initiation of drinking and increased likelihood that those who already drink will drink more.
- There is an increasingly sophisticated range of techniques used in online alcohol promotion to integrate alcohol into the everyday lives of young people.
- Alcohol sponsorship of sporting events leads to greater alcohol consumption and implicit brand familiarity and liking among young people.
- Point of sale promotions increase the amount of alcohol young people buy on a single occasion (Rossen et al, 2017).

European youth is targeted and reached

Findings of the EUCAM-Amphora study (2016) shows that among a total of 9.038 students (13 & 14 year) in Germany, Italy, The Netherlands and Poland:

- 1 out of 3** received promotional e-mails from alcohol brands;
- 1 out of 5** looked at a website for alcohol brands/drinking;
- 1 out of 5** downloaded a mobile phone or computer screensaver containing an alcohol brand name or logo;
- 1 out of 3** used a profile page on social media sites like facebook with an alcohol brand or logo;
- 2 out of 3** noticed an internet page that contained an alcohol advertisement, and **1 out of 5** reported to notice this often or very often.

Alcohol Marketing Regulations World Wide

WHO: The strength of alcohol marketing policies varies widely across regions and countries; in 2012, nearly 40% of the 159 countries that provided information to the WHO report that they had no restrictions.

4 main categories of regulations:

- No restrictions
- Voluntary regulation or self-regulation
- Partial statutory restrictions (on content, time and place, or particular audiences)
- Complete ban.

Alcohol Marketing Regulation on EU-level

- AVMSD (Audiovisual Media Services Directive) is mainly content based and easily accepted and has no essential difference with the self-regulatory system of the alcohol industry.
- Officially the AVMSD states (principle 89): It is necessary to lay down **strict criteria** relating to the television advertising of alcoholic products.
- Audiovisual commercial communications for alcoholic beverages **shall not be aimed specifically at minors** and shall not encourage immoderate consumption of such beverages (article 5e).
- But...all forms of audiovisual commercial communications for cigarettes and other tobacco products shall be prohibited (article 5d).

Alcohol Marketing Regulation on EU-level

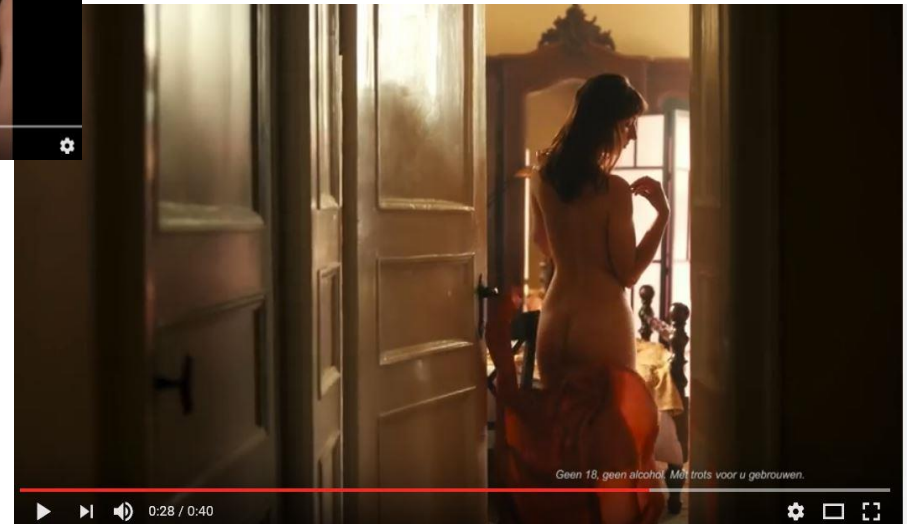
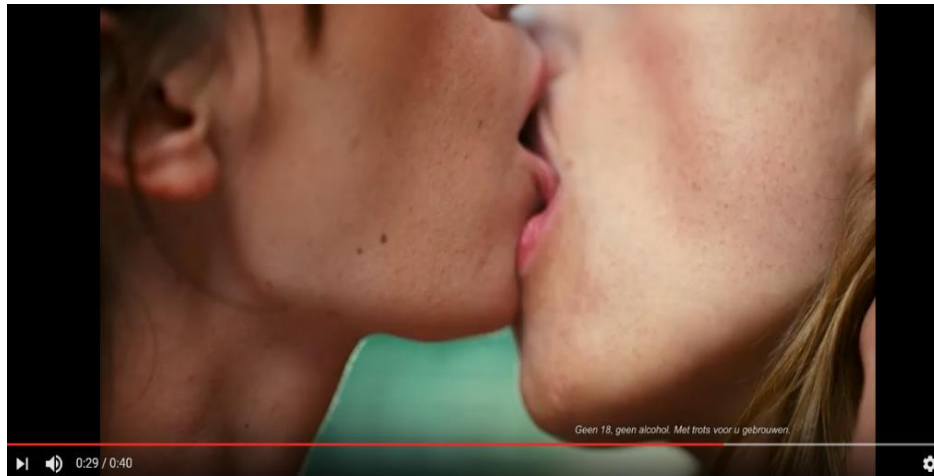
- AVMSD (Audiovisual Media Services Directive), article 22:

Television advertising and teleshopping for alcoholic beverages shall comply with the following criteria:

- (a) it may not be aimed specifically at minors or, in particular, depict minors consuming these beverages;
- (b) it shall not link the consumption of alcohol to enhanced physical performance or to driving;
- (c) it shall not create the impression that the consumption of alcohol contributes towards social or sexual success;
- (d) it shall not claim that alcohol has therapeutic qualities or that it is a stimulant, a sedative or a means of resolving personal conflicts;
- (e) it shall not encourage immoderate consumption of alcohol or present abstinence or moderation in a negative light;
- (f) it shall not place emphasis on high alcoholic content as being a positive quality of the beverages.

Heineken and sexual success (2018)

- <https://www.youtube.com/watch?v=cZuJP00QkvQ>



Self-regulation

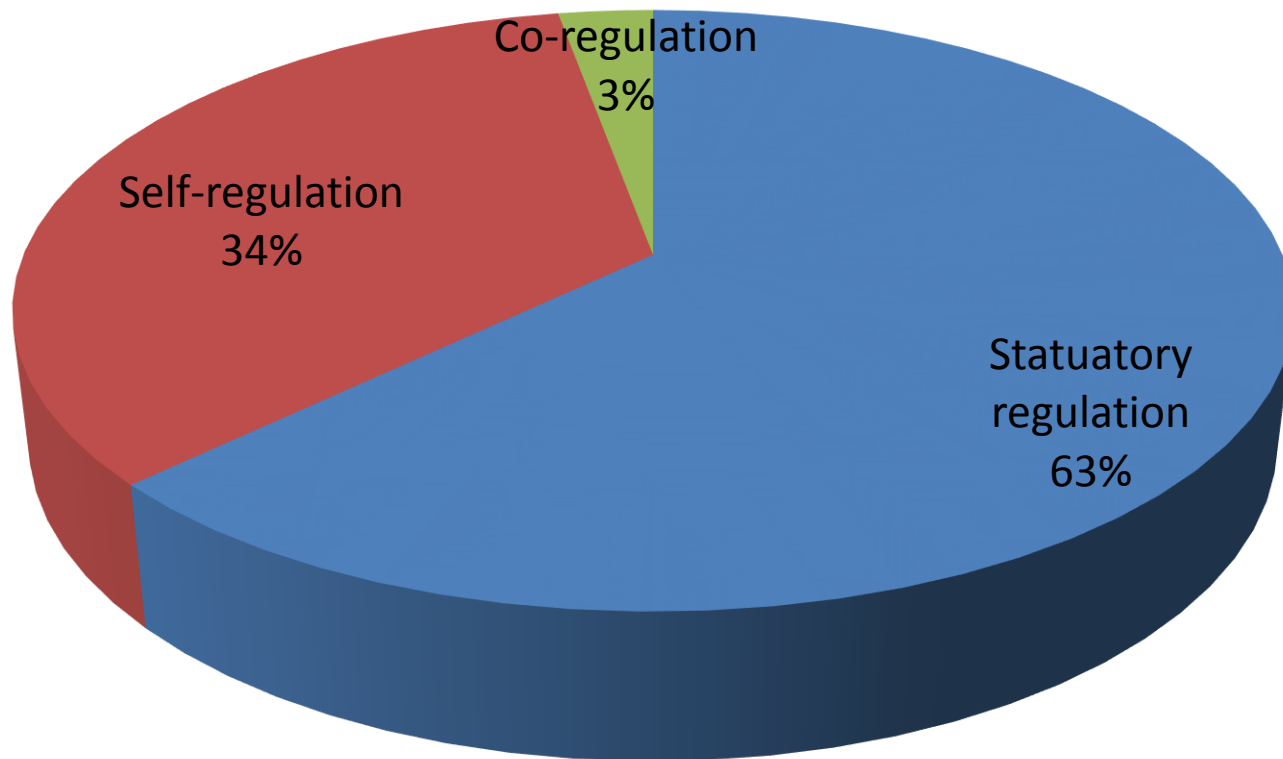
- Recent reviews of more than 100 studies of self-regulation suggest it does not protect vulnerable populations such as youth (Esser & Jernigan, 2018)
- Self-regulated alcohol marketing codes often do not cover all types of media (e.g., the Internet or social media)
- Self-regulation is mainly content and not volume based,
- Often these codes exclude sponsorship

Conclusions monitoring self-regulation in 5 countries (2012)

1. Many complaints about advertisements were rejected.
2. Advertising Code Committees accept relatively large amounts of alcohol advertising practices which are appealing to young people.
3. Many alcohol advertisements contain features from youth culture
4. Humour is an attractive style element to young people, but that element is not addressed in self-regulatory codes.
5. Many advertisements are, judging by the views of the Youth Panels, in breach with the Council Recommendation and AVMSD.
6. The formulation of the self-regulation articles is clever and precise; complaints are therefore easily rejected.
7. Acceptance of self-regulation in Europe contributes to alcohol use among children and youngsters.

Alcohol Marketing Regulations in Europe

Percentage of alcohol marketing self-regulation, statutory regulation and co-regulation in 21 European countries



Absolute numbers: Self-regulation 24, Co-regulation 2, Statutory 44

Ban on tv-advertising in Europe

Television		
Complete ban	Norway Sweden Russia	
Time-based restrictions (ban on alcohol advertising before watershed)	In place in many EU countries	8.30pm – Spain 9pm – Estonia, Malta, the Netherlands 10pm – Finland, Slovakia, Romania 10.30pm – Portugal 11pm – Lithuania, Poland
Content-based restrictions	France Bulgaria Finland Latvia Poland Spain Slovakia Romania Estonia (in draft)	In France, TV advertising is limited to alcoholic drinks with a certification of quality and origin and linked to a production region or to cultural, gastronomic or regional heritage, and subject to general content restrictions. Bulgaria, Finland, Latvia, Poland, Spain, Slovakia and Romania prohibit advertisements for spirits/strong alcohol on TV. In Estonia, only black and white static images will be allowed on TV and in internet adverts.

Restrictions on advertising content

Restrictions on advertising content

France	1991 version of the Loi Evin: Only advertise product characteristics: "The authorised advertising for alcoholic beverages is limited to the indication of the degree of alcohol by volume, origin and name of the product, name and address of manufacturer, agents and custodians and the method of production, terms of sale and consumption mode of the product."
Ireland (in draft)	Draft legislation limits images/references in adverts to product, country/region of origin, method of production, premises where produced and product characteristics.
Finland	Advertising restricted to products under 22% abv. Advertising of spirits is also restricted or banned in: Bulgaria, Latvia, Poland (also wine), Spain, Slovakia, Romania.
Estonia (in draft)	Only black-and-white static images will be allowed in commercials on TV and the internet. Only product information and a health warning can be read out without any musical accompaniment.

Restrictions on sponsorship

Sponsorship		
Complete ban	Norway France Sweden	
Ban on sponsorship of youth events	Ireland (in draft)	Draft legislation in Ireland also proposes a ban on advertising in or on a sports area (playing pitch, athletics track, motor racing track).
Ban on sponsorship of events involving driving	Ireland (in draft)	

Loi Evin of France

Under pressure from the alcohol industry, the French have reduced the restrictiveness of this law since its implementation in 1991. Today, alcohol advertising in France is generally permitted online, and the advertising of regional or cultural drinks is allowed on media where it was previously prohibited, including television and cinemas.

Before 1991



After 1991



Finland and social media

Internet/digital media

Ban on certain forms of alcohol marketing common in new media: using games, lotteries and contests; use of textual or visual content produced by consumers or content intended to be shared by consumers (since 2015)



Focused on techniques used in alcohol advertising

Advertising, indirect advertising and sales promotion is prohibited if 'they involve taking part in a game, lottery or contest or if the advertising commercial operator in an information network service administered by itself uses any textual or visual content produced by consumers or places into the service textual or visual content, produced by itself or by consumers, which is intended to be shared by consumers.



Some conclusions

Voluntary rules by the industry are generally ineffective to protect young people (de Bruijn et al 2010, Vendrame & Pinsky 2010; Babor et al 2010, Noel et al, 2016,) which underlines the need for legal restrictions of alcohol advertising

It's better that codes specify permitted forms of promotion rather than attempting to address all non-permitted promotional activities.

Don't expect to easy substantial successes on supra-national level; focus on changes on national level! The lobby of the alcohol industry is very strong on international level.

Statutory alcohol marketing restrictions in the Baltic countries



Alcohol Marketing Restrictions in Lithuania (1)

Marketing:

- Total ban on alcohol advertising with only a few exemptions (such as a logo of producers in sales areas) since 1st January 2018 (Alcohol Control Law).
- Use and advertising of discount campaigns for alcoholic drinks prohibited in the shops, since Nov 1, 2016;

NB: All currently implemented alcohol marketing regulation in Lithuania are statutory.

There is no active non-statutory regulation within and by industry.

- **No health warning labels**



Alcohol Marketing Restrictions in Lithuania (2)

Purchase:

- The legal age to purchase and consume alcohol has been increased from 18 years to 20 years since January 1st, 2018
- Alcohol retailers can ask for legitimation, when in doubt if the customer is younger than 25, since January 1st, 2018
- Restricting off premise sale of alcoholic beverages (exceptions: airports, ferries, train bars/shops) from 10 am until 8 pm Monday to Saturday, and 10 am to 3 pm on Sunday, since 1st January 2018;
- No alcohol sales in petrol stations since January 1, 2016;



Alcohol Marketing Restrictions in Latvia (1)

Marketing, volume restrictions

Alcoholic beverage advertisements are among others prohibited:

- In educational and medical treatment institutions
- On the external pages (cover) of books, journals and newspapers
- On public means of transport
- There is no restriction for cinema, nor digital media.
- Ban on alcohol advertising at sport events (information on sponsoring contains information about an alcoholic beverage (except the name of the sponsor).

Marketing, content restrictions

- For TV and radio, implementing the AVMS Directive.



Alcohol Marketing Restrictions in Latvia (2)

Health warning

- Warnings about the negative consequences of alcohol must be included in advertisements and must cover at least 10% of the specific ad.

Purchase <18

- It is prohibited to sell alcoholic beverages to persons under 18 years of age and such persons may not purchase them. In order to verify the age of the person, the retailer has a duty to demand the person present a personal identification document.

Purchase 18-25

- Persons from 18 to 25 years of age upon purchasing alcoholic beverages have a duty to present a personal identification document to the retailer in all cases regardless of whether the retailer has requested it.



Alcohol Marketing Restrictions in Estonia (1)

Marketing

From Juni 2018:

- Alcohol advertising is banned on TV and radio from 7-22 o'clock.
- Advertisement of alcoholic beverages **can contain only:**
the name of the drink, the type of the drink, the name of the producer, the brand, the state and the region of origin, the content of ethanol, the image of the sale package of the beverage, the description of the characteristics of the beverage (colour, taste, aroma), the visual of the ad cannot include a person (neither in animated form), only his/her voice.



Alcohol Marketing Restrictions in Estonia (2)

Marketing

From Juni 2018:

- All outdoor advertising will be banned.
- Ban on social media channels, except industry own accounts.

Health warning

- Advertising of alcohol shall include the warning: "Attention! This is an alcoholic beverage. Alcohol may cause damage to health."

With TV ad the health warning should be presented horizontally throughout the screen and read with a normal voice speed. The health warning must cover at least 20% of the ad.

Self-regulation

- Self-regulation in Estonia is focussed on TV, radio, cinema, internet/digital media, outdoor, print, promotional items

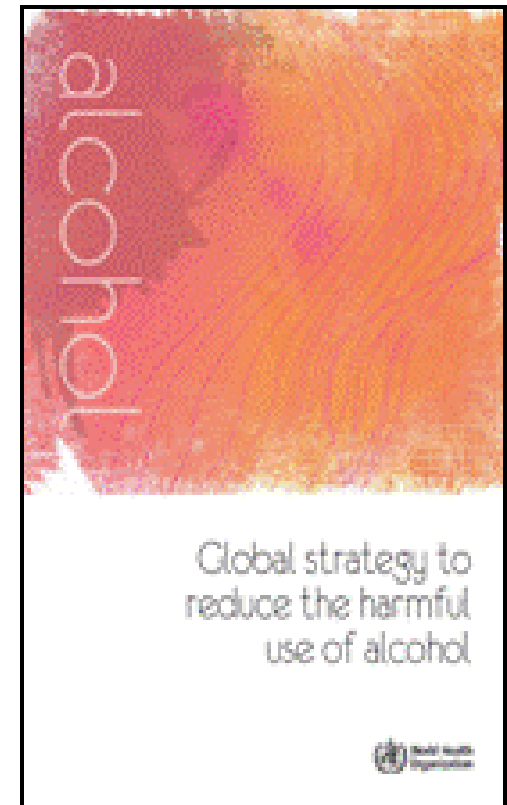


World Health
Organization

WHO

The WHO Global Alcohol Strategy (2010) recommends the use of regulatory or co-regulatory frameworks, **ideally with a statutory basis**, for regulating the content and volume of marketing, direct or indirect marketing in certain or all media, and sponsorship activities that promote alcoholic beverages

The WHO recommends in its European Action Plan (2011) a total ban of alcohol advertising in Europe.



The alcohol policy climate is changing all over the world

(1)

- **Ireland (May 2018)**
This country will introduce stricter regulations on alcohol marketing (in 2019?) and a warning linking alcohol and cancer on drink bottles
- **Australia (May 2018)**
Alcohol advertising code in need of 'thorough review' for failing to protect teens
- **Greenland (April 2018)**
Alcohol marketing ban in Greenland
- **News from the UK (April 2018)**
Is drinking becoming as socially unacceptable as smoking?

The alcohol policy climate in changing all over the world (2)

The Netherlands (March 2018)

- The image of Heineken is extremely damaged: Heineken's promotional girls in Africa sell beer with their bodies

Europe (March 2018)

- Growth in the alcohol-free beer market: A threat to soft drinks or to ordinary beer?

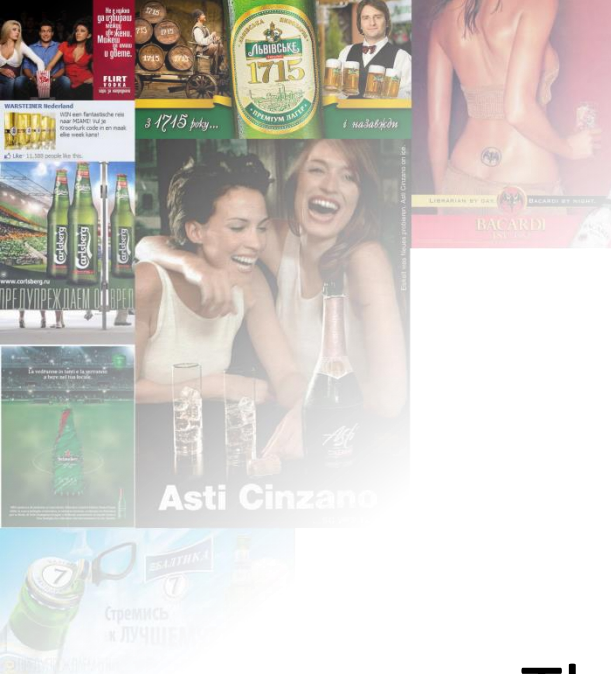
Europe (March 2018)

- The strategies of alcohol industry SAPRO's becomes clear: Inaccurate information, misleading language and the use of confounders to downplay and misrepresent the risk of cancer

- **Sweden (January 2018)**

Sweden might be next in line to restrict alcohol marketing online.

ALL THE RECENT ALCOHOL MARKETING NEWS ON WWW.EUCAM.INFO



Thanks for your attention

Ir. W.E. van Dalen
Director Dutch Institute for Alcohol Policy STAP
President EUCAM, European Centre for Monitoring Alcohol Marketing

www.stap.nl

www.eucam.info

wvandalen@stap.nl

wvandalen@eucam.info

Utrecht, The Netherlands, June 2018