

# Study on the exposure of minors to alcohol advertising on linear and non-linear audiovisual media services and other online services, including a content analysis

*Meeting of the Committee on National Alcohol Policy and Action*

*Kim Weistra (Ecorys)*

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NATIONAL INSTITUTE  
FOR HEALTH AND WELFARE

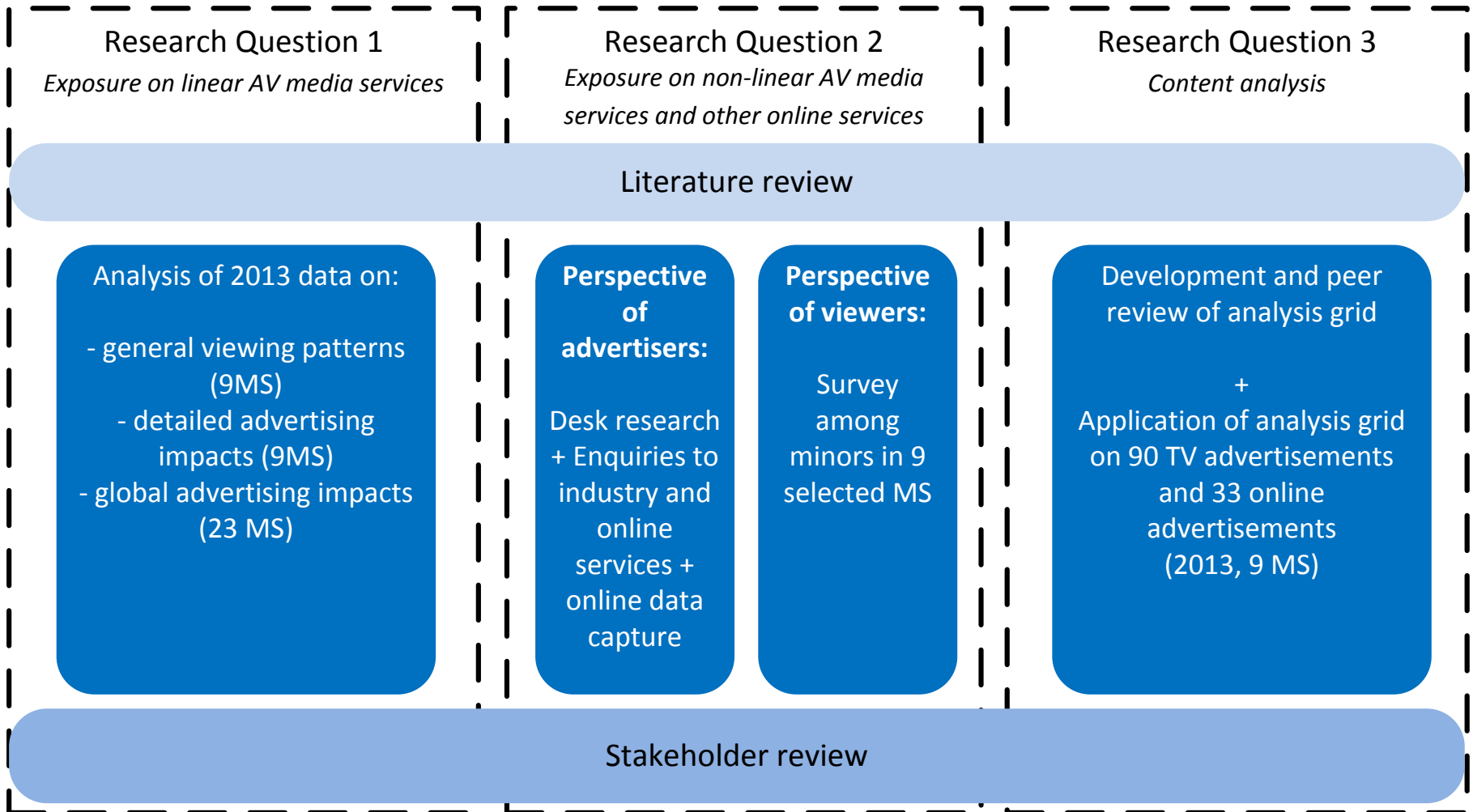
# Research questions

- **Research question 1:** How much alcohol advertising does an average minor watching linear audio-visual media services in the EU see?
- **Research question 2:** How much alcohol advertising does an average minor see on non-linear audio-visual media services and other online services in the EU?
- **Research question 3:** For audio-visual media services (both linear and non-linear) and other online services, what type of alcohol advertising does an average minor see in the EU? Are minors specifically targeted by alcohol advertising? In how far is alcohol advertising appealing to minors and how? In particular, in how far do the provisions of the AVMSD and their application afford the required level of protection?

# Scope of the study

- Definitions in the AVMSD:
  - *linear audiovisual media service*: 'television broadcasting' or 'television broadcast'
  - *non-linear audiovisual media service*: 'on-demand audiovisual media service'
- 'Minors' are defined as 'individuals aged below 18'
- Focus on **9 Member States**: Austria, Czech Republic, Finland, Germany, Italy, Netherlands, Romania, Spain, United Kingdom
- Study goes **beyond the AVMSD**
  - Includes 'other online services'
  - Content analysis takes broader perspective on what is appealing to minors

# Approach



Research conducted during January – December 2015

# Research question 1 - linear AV media services

## *Main findings & conclusions – global*

- In 2013, on average, a minor in the EU was exposed to 200 alcohol advertisements and an adult saw over 450 alcohol advertisements
- In 2013, 1.8% of all advertising seen by minors was for alcohol – For adults this was 2.2%
- Most exposure to alcohol advertisements was for the sector ‘beer’
- Consistent results across datasets

# Research question 1 - linear AV media services

## *Main findings and conclusions - in-depth analysis (9MS)*

- Exposure to alcohol advertising is highest on **commercial and generalist channels**
- Exposure to alcohol advertising **peaks in the evening**
- Within Member States, exposure to alcohol advertising is **highest for all age groups on the same week day**
- A **weighting by viewing times** reduces the difference in exposure between minors and adults

# Research question 1 - linear AV media services

## *Limitations*

- Analysis focussed on 2013
- Limited level of granularity in the data
- Limited sample of channels for viewing data

## *Recommendations for further research*

- Analyse **exposure over time** through longitudinal studies
- Split the adults into **multiple age groups**
  - E.g. to facilitate comparison between older minors and young adults
- **Larger sample of channels** for the viewing data

## Research question 2 – non-linear AV media services and other online services

### *Main findings – perspective of advertisers*

- Exposure of minors to alcohol advertising is supposed to be limited because of:
  - Measures that **online services** have in place
  - Advertisers' reported **reasons to choose for specific online services**
  - Numerous **self-regulation initiatives** that are in place
- Confirmed by online data capture
  - Only 4 unique alcohol advertisements found in 1,319 YouTube and 950 website screen captures



## Research question 2 – non-linear AV media services and other online services

### *Main findings – perspective of viewers*

- From the advertisements recalled by minors, alcohol is among the least recalled type of advertisements
  - However, **23.9%** of minors aged 9-17 in the 9 MS recall to have seen alcohol advertisements online in the last month
- Awareness of alcohol advertising **increases with age and the frequency of online activity**
  - Same holds for the memory for alcohol advertising and active brand recall
- **Beer** is the most recalled type of alcoholic beverage

## Research question 2 – non-linear AV media services and other online services

### *Conclusions – combining the 2 perspectives*

- **Big discrepancies in results** between the 2 perspectives
  - Makes it difficult to draw overall conclusions regarding the level of exposure
  - We can conclude that:
    - **The level of self-reported exposure** to alcohol advertising increases with age and online activity
    - Both the online services and the industry try to ensure minimal exposure of minors to alcohol advertising through **implementing different measures and self-regulation**

## Research question 2 – non-linear AV media services and other online services

### *Limitations*

- Online data capture
  - Limited selection of online services over limited timeframe
  - Only generated activity on PC
- Survey
  - Risk of recall bias
  - No demarcated definition of ‘alcohol advertising’

### *Recommendations for further research*

- Include **other popular online services** in online monitoring
- Search for other ways to **monitor online exposure**
- Use **focus groups or individual interviews** instead of (only) an online survey
- **Include adults in the survey sample** to facilitate a comparison between minors and adults

# Research question 3 – content analysis

## *Main findings & conclusions - overall*

- Content analysis based on 2 types of criteria:
  - Elements derived from **article 22 of the AVMSD**
  - Elements that - according to the literature - are appealing to minors, but **not necessarily only to minors**
- At least 1 element that can be considered appealing to minors
  - 87% of the TV ads and 63% of the online ads
- Most commonly occurring themes:
  - drinking associated with **sociability**
  - depicting drinking with **humorous tone**
- **Partying and celebration** important context for consuming alcohol
  - 17% of advertisements depicted this context

# Research question 3 – content analysis

## *Main findings and conclusions – AVMSD criteria*

- 25% of all advertisements reflect at least 1 of the AVMSD criteria
  - 37% of television advertisements, 0% of online advertisements
  - No occurrences of **using minors as protagonists** were found
- AVMSD provisions refer to **causal links between the product and its effects**
  - This causal relation typically is not shown in advertisements
  - Focus on associations that are possible to create within a few seconds and without highlighting causality

# Research question 3 – content analysis

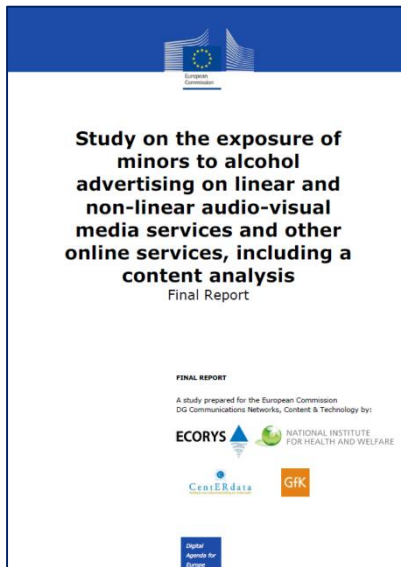
## *Limitations*

- Level of generalisability of the results unclear
  - Focus on 2013 and limited sample size
- Difficulties in estimating elements with primary appeal to minors
- Ambiguities of the subcategories of the analysis grid

## *Recommendation for further research*

- Conduct a **reception study with minors** to define the criteria for the content analysis in more detail
- Include **different types of online advertisements**

# Thank you



Report available at:

<https://ec.europa.eu/digital-single-market/en/news/study-exposure-minors-alcohol-advertising-tv-and-online-services>

[kim.weistra@ecorys.com](mailto:kim.weistra@ecorys.com)

