



WHO COLLABORATING CENTRE FOR
RESEARCH AND TRAINING IN ALCOHOL AND DRUG ABUSE

Alcohol Marketing in the Western Pacific Region

Paper prepared for the World Health Organization
Regional Office for the Western Pacific

by

Centre for Social and Health Outcomes Research and Evaluation

August 2006

Contents

Acknowledgements	4
Disclaimer	4
1. Introduction	5
2. Alcohol marketing in the region.....	6
2.1 Advertising	6
2.2 Alcohol sponsorship.....	8
2.3 Marketing alcohol through youth music.....	10
2.4 Direct marketing.....	11
2.5 New technology.....	12
2.6 New alcohol products targeting young people	13
2.7 Public relations and charity	14
2.8 Exposure of children and teenagers to alcohol advertising	14
3. The value of marketing for the alcohol industry	15
3.1 Increasing alcohol consumption.....	15
3.2 Marketing strategies and expenditure.....	16
3.3 Importance of marketing in a globalised industry	17
3.4 Corporate public relations and responsible marketing	18
4. Responses to marketing: Research evidence from this region	18
5. International evidence on effects of marketing	20
5.1 Statistical studies	20
5.2 Studies of young people’s responses to alcohol marketing.....	22
5.3 Brand images and ‘lifestyle’ marketing attractive to young.....	23
5.4 Evidence that discontinuing advertising can reduce drinking and harm	24
6. Concern among NGOs and governments in the region.....	25
7. Examples of policy in the region.....	27
7.1 Government legislation or regulation	28
7.2 Industry self-regulation	30
8. Policy options	32
9. Benefits.....	34
10. References	36

Acknowledgements

This paper was prepared, with funding from the WHO WPRO, by Dr Linda Hill and Professor Sally Casswell. We acknowledge the helpful comments from Dr David Jernigan, Centre on Alcohol Marketing & Youth, Washington DC, US, and Professor Tom Babor, Community Medicine & Health Care, University of Connecticut, US, on an earlier draft of this paper

Disclaimer

This publication contains the collective views of an international group of experts and does not necessarily represent the decisions or the stated policy of the World Health Organization

1. Introduction

Alcohol marketing, and the exposure of children and adolescents in particular to commercial messages about alcohol brands, is an area of growing policy importance. Alcohol is marketed through increasingly sophisticated advertising in mainstream media. Alcohol is also promoted by linking alcohol brands to sports and cultural activities through sponsorships and by direct marketing that use new technologies such as the internet and mobile telephones. Alcohol brand campaigns are often a package of media advertising, sponsorships, marketing events and point of sale promotions.

Although evaluation of the new technology forms of marketing is still limited, there is now an ample evidence base that shows how alcohol advertising messages shape beliefs about alcohol and drinking behaviour among young people, helping to recruit the next generation of drinkers. Alcohol advertising, particularly television advertising that comes into the home, is also reported to make it more difficult for heavier drinkers and those in treatment to give up.¹

The question to be asked by governments – as a Parliamentary Inquiry in Victoria, Australia recently noted² – is the extent to which active promotion of alcohol should be permitted as part of a market economy or constrained in the interest of reducing harm, particularly among young people.

The Western Pacific region includes varying traditions in regard to alcohol use and a mix of mature and emerging alcohol markets. This was historically true also of countries in Western Europe. Advertising and other marketing by the beer and spirits industries was identified as a factor contributing to a convergence of drinking patterns in the 1970 and 1980s.³ This was followed in the 1990s and 2000 by growing concern about heavy drinking and harm, particularly among young males, in which the growth in alcohol advertising and forms of marketing that targeted the young people were implicated.^{4,5}

There are similar patterns of heavy youth drinking in Australia and New Zealand, where alcohol advertising and other forms of marketing have also increased over the past two decades. There are also concerns about young people and heavy drinking in Pacific Islands and Asian countries where alcohol availability and marketing is increasing. In the emerging economies of the region there are many examples of increasing use of non-traditional alcohol beverages.

2. Alcohol marketing in the region

2.1 Advertising

Australia's National Alcohol Strategy reports that alcohol promotion in main stream Australian media and on the internet has grown considerably in the past decade, and is particularly influential with the young.⁶ In the year to 30 October 2003, A\$94.3 million was spent on alcohol advertising in the main stream media. Of this, A\$11.4 million was for beer, A\$16.7 million for wine, A\$23 million for spirits and A\$ 11.4 million for pre-mixed drinks. This did not include a recent increase in alcohol advertising via the internet.⁷

In New Zealand, as part of a programme of deregulatory changes that included both broadcasting and liquor licensing, advertisements for alcohol outlets and alcohol sports sponsorships were permitted in the 1980s. Alcohol brand advertising followed from 1992 on radio and on television after 9 pm. Alcohol ads on television rapidly quadrupled.

In 2005 NZ\$25.7 million was spent on alcohol advertising on television and radio, compared to NZ\$1.2 million in 1987. Annual spending on magazine ads is around NZ\$3.6 million. In 2005 NZ\$3.8 million was spent on outdoor advertising, 80% of it for beer brands. Around NZ\$30 million was spent on beer advertising in the broadcast media, print media and billboards, compared with NZ\$3 million on advertising wine. Spirits advertising peaked in 2002 at NZ\$9.5 million dollars but had fallen to NZ\$2.9 million in 2005. Survey data indicated that young people aged 12-17 years were exposed to an average of in excess of 400 television ads for alcohol per year.⁸

In Japan, alcohol advertising on television occurs from 6 pm onward; 10% of ads on Tokyo's five television channels promote alcohol as a fun product and portray drinking as a glamorous pastime.^{9,10} Kirin's partner Anheuser Busch created a beer for the Japanese market with less malt and more alcohol than other beers. Both the extra strength and its lower price are featured in advertising.¹¹

In Singapore, advertising and promotion is heaviest for beers, in a battle mainly between the top domestic brand Tiger (Asia Pacific Breweries) and the global brand Carlsberg which, by 2006, had gained the upper hand. Aggressive marketing has been based on brand promotion rather than price. Lager as a whole grew by around 3% by volume and nearly 5% by value in

the Singapore market. Advertising and direct promotions have also revived Asia Pacific Breweries' declining stout sales in 2003 and 2004. Lifestyle advertising is being used to promote imported vodka and tequila to young nightclub and party goers. Wine drinking is also being promoted as part of a refined lifestyle and as having benefits for longevity and reduced risk of heart disease.¹² Marketing also contributes to the perception in China and Korea that wine and beer are good for health. Industry analysts consider this perception has fuelled increased sales.¹³⁻¹⁵

China has a very long history of alcohol production and drinking. Since China's 1978 economic reforms, alcohol advertising has increased, mainly on television, with consumption, particularly of beer, growing markedly from that time. Industry consolidation, which has included global companies, has contributed to a boost in marketing of branded drinks. In 2000 alcohol advertising expenditure was around US\$30 million in the print media and US\$268 million on television, increasing to US\$357 on television ads in 2003.¹⁵ From a survey of 156 main channels in 34 cities, it is estimated that a young person who watches two hours of evening television on average will see over 900 alcohol ads a year.¹⁵ Increasing numbers of ads are appearing in public places, such as the sides of bus, road sides, bus stops, railways stations and airports, public halls, cinemas and sports clubs. Ads often link alcohol to celebrations of Chinese sporting success.

In mainland China and in Taiwan alcohol companies link their product promotions to traditional celebrations – Chinese New Year, Mid-Autumn Festival, Dragon Boat Festival and Father's Day.¹⁶ For Chinese New Year 2004 in mainland China, an Absolut Vodka campaign plugged into cultural tradition and calligraphy with a visual pun, an upside-down Chinese character for good luck in magazine ads with upside-down print and on huge rotating billboards. Turning the character brings good luck – in parallel with upending the Absolut bottle to pour the vodka. The focus of Absolut's award winning ads world-wide is the iconic bottle shape, filled with an emotional or cultural symbol that appeals to the target audience.¹⁷ That year sales for its producer V&S grew 56 per cent in Asia and the Pacific Region.

In the Philippines, revamped images and new marketing strategies for beer and spirits, conventionally pitched as a mature man's drink, are being used to target women, particularly by the large local companies, Asia Brewery and San Miguel Corporation. This contributed to San Miguel Light, a low calorie beer, outperforming San Miguel Pale Pilsen in 2003. In 2005 San Miguel gave increased attention to building its brand images.

Although advertising is banned on broadcast media in Malaysia, beer and spirits are advertised in cinemas and in the print media. Carlsberg credited its success in Malaysia to a single 1970s advertising campaign in print, cinema and Chinese videos that targeted primarily drinkers in rural areas. This ‘long cool Dane’ campaign starred a leggy blonde woman in a white bathing suit. Other international brands have made health claims, such as ‘Guinness is good for you’ and even that Benedictine liqueur (40% alcohol by volume) is ‘good for mothers in confinement’.¹⁸

In the Pacific Islands, levels of alcohol advertising vary. In Tonga it is permitted in all media and is also seen on posters and on sports fields. Samoa’s Liquor Act says advertising must not target young people, but health promoters report that children and young people are exposed to alcohol advertising, including on large billboards around the islands and ‘incidental’ advertising for restaurants and hotels. In the Cook Islands, a 1998 Healthy Islands Committee recommended against all forms of alcohol advertising and sponsorship. Niue’s broadcasting corporation does not permit alcohol advertising, but promotional materials and branded merchandise are distributed by New Zealand breweries. In New Caledonia, alcohol advertising is not permitted on radio and television and advertising is restricted to product characteristics in other media (as in France). In Fiji, alcohol advertising is freely advertised and aggressively marketed. In Micronesia, no business related to alcohol in Pohnpei State may advertise, whereas in Guam, a US territory, alcohol is heavily advertised in all media. Even on the smallest islands, young people see alcohol advertising via satellite television and videos, and other forms of marketing such as billboards and alcohol company sponsorships are increasing.¹⁹

2.2 Alcohol sponsorship

An unknown but high proportion of marketing expenditure, estimated at 60% in the US by the Federal Trade Commission²⁰, is on non-media forms of promotion. Alcohol company sponsorship of sports and cultural events is a major marketing strategy, which is under researched and seldom addressed in policy. New Caledonia is the only country in the region which prohibits alcohol sports sponsorship.

Sponsorships provide promotional opportunities that embed brand names and products in the lived experience and everyday activities of consumers and potential consumers, tapping into social processes that establish and reinforce cultural identities. This form of marketing accesses audiences when they are receptive to ‘experiential learning’ about a product – while

having a good time at an exciting branded event. Sports events in particular attract large numbers of young men, the group most likely to be heavier drinkers.²¹⁻²³

In Australia and New Zealand, alcohol companies have a long history of involvement in football, with sponsorship deals at all levels: from local clubs with junior teams, to pourage rights at sports stadiums, to regional and national teams and branded events attracting national media coverage. In the late 1990s a time sample of sponsored sport television clips showed that New Zealand's two main breweries were between them sponsoring most male sports. A 2003 study of sponsorships in the Wellington region and nationally via internet information found that the top eight sports for 5-17-year-olds were dominated by three products, one of which was alcohol.^{24,25} In research on alcohol brands and identity formation among young New Zealanders, fieldwork documented numerous examples of alcohol sponsorship for teenage sportspeople and local sponsored events attended by them.²³

At the national and international level, Fosters was a sponsor of the Sydney Olympics in 2000. The New Zealand All Blacks are sponsored by Lion Nathan. There were high profile promotions during British Lions visit in 2005 and beer drinking was given positive attention in news and sports. 'Heroes of the young' may not be shown in alcohol advertisements, according to industry voluntary rules, but are seen by young people on alcohol sponsored television programmes. Television programme sponsorship allows alcohol brand logos to be seen at times when alcohol advertisements are restricted.

The Japanese alcohol companies are particularly associated with golf, a desirable but expensive sport among Japanese salarymen, and sponsors the Japanese teams in the Olympic and World Cup soccer. One of Kirin's multiple businesses is branded sports goods, while Asahi owns a golf club near London. In the small island nations of the Pacific, sponsorship of local events is a key strategy for marketing alcohol. Samoa Breweries' two main products are Valima beer, which sponsors adult sports and festivals, and Coco-Cola which sponsors school sports events. As the brewery's role is well-known, health promoters consider this to be an indirect and longer term approach to growing its alcohol market among young people. In Nuie, it is well known that NZ\$1 per can of beer tax is earmarked for sports organisations and activities.²⁶

Alcohol companies also sponsor major international sports events, giving them a world-wide profile. Carlton Fosters, with breweries in Australia, China, Vietnam, India, Fiji and Samoa, as well as wine and spirits interests, has a long association with Formula One motor racing. Other examples are Carlsberg and Anheuser Busch, both major new entrants into the Chinese

beer market. Carlsberg's sponsorship of EURO 2004 grew the Carlsberg brand by about 6% worldwide that year, with June sales up 54% in Portugal. Carlsberg told shareholders that its signage had appeared in the background of television sport coverage for an average of 16 minutes per game. Anheuser Busch frequently sponsors the Olympics and World Cup soccer, avidly watched in Asian countries. It just concluded a World Cup sponsorship deal for 2010 and 2014. Both companies have been criticised in Europe for advertising that circumvented national policies.²⁷ Anheuser Busch failed to persuade France to lift its ban against alcohol sponsorship for the 1998 World Cup but had more success in getting Utah to change its law against alcohol advertising for the 2002 Winter Olympics, by starting six years ahead with a court challenge.²⁸

2.3 Marketing alcohol through youth music

Alcohol brands are also plugged into youth culture through sponsorship of music and musicians. Molson Coors organises large free concerts, with associated competitions to 'be a rockstar' run through outlets. The brand of these events is the beer, and that is the guarantee of quality, so there is no need to reveal the line-up of bands. Ownership links between the alcohol and recording industries have led to sponsorships of rock and hip-hop musicians and high levels of reference to alcohol in US rap music.^{29,30} V&S's Absolut brand sponsors musicians and designers to create works inspired by the brand or the bottle.

This marketing approach is also being used in Asia. In Thailand the Singha beer brand promotes hip-hop music events starring international and local musicians, while Singha Soda sponsors a music and dance competition for teenagers 13 years old and over. Heineken has sponsored a music festival, followed up with a branded CD of the music.³¹

Concerts are also sponsored by alcohol companies in Australasia. The New Zealand Music Awards and the largest summer rock events are alcohol sponsored, with associated competitions and promotions. In Australia, Jim Beam sponsored concert tours and campus band competitions and Jack Daniels sponsors music industry awards and summer rock festivals. Lion Nathan covers all bases by sponsoring the Sydney and Adelaide Festivals and Fashion Week, as well as the largest youth oriented summer rock event in each country, the Big Day Out.

2.4 Direct marketing

Direct marketing includes brand promotions at venues or retail outlets at which drinkers can be approached directly, or creating the brand's own events at which the public or invited customers attend. New brands and products, such as ready-to-drinks, are often launched in this way, as well as through advertising, to give people an opportunity to sample the product and to create media attention.

A popular form of direct marketing in a number of Asian countries is the use of young women to promote alcohol. In 2003 a new brand image was launched for Taiwan Gold Medal Beer. Strategies in a huge marketing push included a smaller bottle for bars and restaurants and hiring pretty young women as Taiwan Beer Girls to promote drinking their brand.³² In Malaysia, international brand companies such as Guinness and Carlsberg hired young women to represent them in bars and restaurants, greeting customers and offering them the company's beer. The breweries sponsor tours of beauty queens and models to go around the bars. Some 80% of premium spirits are sold in hostess clubs for local and foreign businessmen, where managers receive bonuses over and above sales profits for pushing particular brands. The spirits companies provide gifts, perfume etc. for club patrons, depending how much they drink. In the late 1990s, one promotion for Jose Cuervo tequila (Diageo) bore the title "Lick, Shoot and Suck", and offered bar patrons the opportunity to lick salt from a woman's cleavage, take a shot of tequila and then suck a lime from the woman's mouth.¹⁸ Beer girls are also employed in Cambodia to sell monthly quotas of international beer brands – Heinekens, Stella Artois, Budweiser, Fosters, Labatts, Becks. Wearing costumes supplied by the distributors, they use 'playful' sexuality to sell beer for US\$1.50-\$4.50. They are paid \$2 per day to sell around 24 cans of beer per day, and between 15-30 cases a month. Many become 'indirect' sex workers at high risk of HIV/Aids.³³

Scandinavian bans on advertising³⁴ may be a reason that the Swedish state-owned company V&S has developed spectacular direct promotions at home and abroad. 'Private' product launches include cool young women paid to chat and flirt, branded drink in hand as subtle 'living advertisements'. In Tokyo in 2005, promoters of its Absolut brands spotted eye-catching stylish individuals on the street and invited them to create a costume inspired by the Absolut bottle. They were then photographed at locations around Tokyo by an award winning photographer. Another Tokyo promotion was a bar made entirely from ice, from the walls to the glasses that held Absolut cocktails, giving 50 guests at a time the chance to experience a Lap winter and sample the brand.

In Cambodia, purchase of alcohol products puts buyers into a draw for small prizes or to participate in an alcohol sponsored television game show with a car or a house as the top prize. Competition between the show's participants includes games using branded product containers.³⁵

Direct promotions included brand merchandise, either for sale or free. In New Zealand alcohol sponsored sports and other events are a source of branded merchandise for young people. As well as clothing and sports equipment, researchers have collected numerous small branded gifts. Beer brands were giving away army-style dog tags, hats and t-shirts, novelty dice for drinking games, lanyards for cellphones and key rings like tiny wetsuits for surfers. A wine brand distributed little pots of balm. The New Zealand breweries' branded sports equipment, posters and other promotional goods also reach small Pacific Islands such as Niue. Free screen savers and music can be downloaded from alcohol brands websites.³⁶

2.5 New technology

The internet provides a new marketing tool with a global reach. Alcohol corporations now usually run a separate, highly sophisticated website for each key brand, and a separate corporate website. The websites are designed to interest and attract niche markets of mainly younger drinkers. A date of birth question suggests deterrence of viewing by minors. The websites are highly interactive, offering competitions, free software and music downloads, branded merchandise for purchase, and post up photos sent in by drinkers. They support other marketing strands by providing news and events calendars for sports or music sponsored by the brand, competitions to win tickets to branded concerts or to 'be a rockstar', and link website viewers into other promotions via bars and retail outlets. Brand websites also provide opportunities for viral marketing via emails and text messages to friends.

This approach is likely to increase in use in marketing to tech-savvy young people in Asia. In breaking into the market, Kirin is already offering viewers of a job search website a free 6-bottle ice bucket at participating pubs, by redeeming a voucher sent to them on their mobile. Its joint venture partner Anheuser Busch has just secured a deal with the leading US provider of television for mobile phones that allows it 18 beer ads per hour on 30 channels. This new phone technology is disproportionately used by people under the US legal age for alcohol purchase.

2.6 New alcohol products targeting young people

Alcopops or ready-to-drinks (RTDs) are a new category of canned or bottled drinks marketed from the mid-1990s which appear to target not yet saturated subgroups in the population – young people and women. These are sweet-tasting, pre-mixed drinks, usually made from distilled spirits but sometimes from wine or strong cider mixed with carbonated soft drink or fruit flavours. Their strength is usually around 5% alcohol by volume (abv), the same as beer, but sometimes as much as 8% abv.

Australia is credited with developing this new product. By 1999 RTDs were Australia's third favourite alcohol beverage overall, tended to be drunk on heavier drinking occasions and had replaced beer and spirits as preferred drinks for older and young girls.^{37,38} These drinks are often marketed in low profile ways that reduce policy attention as well as costs.³⁹ However a televised campaign for a vodka-based RTD was carried out in Australia in 1999. This was subject to research which indicated that a quarter of 15-16 year olds thought the ads were targeted at people of that age.⁴⁰ In 2002 an Australian company was denied a licence to sell an alcoholic milk, Moo Joose, with chocolate, banana, strawberry and coffee flavours and over 5% abv.⁴¹ In New Zealand, spirits based RTDs have increased from their introduction in 1995 to more than 43 million litres in 2005.⁴²

Analysts of the Asian markets for alcohol describe RTDs as a starting point for young consumers moving from non-alcoholic beverages to alcoholic drinks. For example, growth in RTDs is anticipated in the Philippines among women and entry drinkers, based on a population mean age around 21 and positioning between 'the juvenile image of non-alcoholic beverages and the too scruffy aura of hard spirits'. Marketing of RTDs in the Philippines began small but volumes grew by 35% in 2004 as local versions began to compete with the imported brands led by Diageo Philippines Inc's Smirnoff Mule. Numerous product launches, leveraging on the popularity of vodka and local spirits-favourite, gin, increased sales growth in 2005.⁴³

In Indonesia, spirits based flavoured beverages have been the most dynamic sales category since 2002, and are now available in all parts of the country. They achieved triple-digit growth in 2003, with value growing faster than volume in 2004. They are mainly marketed to young middle-class people in the cities, as well as to tourists and ex-patriates.⁴⁴

Spirits-based RTDs also took off in 2002 in Taiwan led by Diageo's Smirnoff Ice 'combining aggressive marketing efforts and widespread distribution reach'³². New brands in 2003 and

2004 were heavily backed by advertising campaigns on television and given large retail shelf space, even in convenience store chains. They took some market share from imported beers, as both have a trendy image and comparable price, but are believed by female drinkers in particular to have a better taste. The highest growth was in 2005.¹⁶ The experience in Japan and the US suggests that this market may stabilise, with foreign brands such as Smirnoff and Vodka Cruiser surviving competition while local brands eventually withdraw.³²

A feature of many RTD brands is bright packaging that is attractive to young people. Innovation in packaging is a marketing strategy in itself – not only the ‘iconic’ Absolut bottle, but cans that keep drinks cool in hot weather, and phosphorescent labels that glow their brands message through the darkness of nightclubs.

In New Caledonia, a new Heineken product, low alcohol ‘bière fraiche’, is considered to target young people. As in France, ads are restricted to product characteristics, and the ads show its bubbles, together with the sound of beer pouring.⁴⁵

2.7 Public relations and charity

A new tack in alcohol marketing combines sponsorship and direct promotion techniques with corporate public relations and ‘investing in the community’. Alcohol companies have associated their brands with disaster relief charity work. Pernod Ricard contributed to relief funds and Diageo matched employee donations. Most controversially, Carlsberg launched Lion Beer in Sri Lanka while assisting tsunami relief and distributed water in beer bottles with company label, logo and name, as did Anheuser Busch after Hurricane Katrina. Fosters donated to the relief agencies and at home promoted tsunami appeals on beverage containers and provided call centres to take donations during a fundraising cricket match. A year later, Lion Nathan’s Queensland XXXX brand hosted a fundraising Beach to Brewery Walk for Innisfail cyclone relief, led by characters from the XXXX Gold television advertising campaign. Donations were matched and at sports games that weekend, 10 cents was donated for every beer sold.

2.8 Exposure of children and teenagers to alcohol advertising

In both Australia and New Zealand, alcohol is now advertised on television after 8.30 pm. New Australian research has found that exposure to advertising for some alcohol brands is higher for 13 to 17 year olds than the 18 to 24 year old adults.⁴⁶ In New Zealand television

viewing data for 2004-2005 showed that 90% of children aged 5-14 and 91% of those aged 10-17 are exposed to alcohol advertising on television at least weekly.

Exposure data for alcohol brands was matched with data from the National Youth Alcohol Survey on brand allegiance among 12-17 years olds. There was a strong positive correlation between levels of advertising and loyalty to a beer brand. That is, the beer brands that had more advertisements on television were more likely to be a favourite with 12-17 year olds. Similarly, those who reported they had a favourite RTD or spirits brand were more likely to choose one that was more advertised on television. For both beer and spirits brands, there was also a strong correlation between expenditure on advertising and brand allegiance.⁸

3. The value of marketing for the alcohol industry

3.1 Increasing alcohol consumption

There is intense competition between corporations such as Diageo, Heineken, Carlsberg, Anheuser Busch, SABMiller and Kirin to position themselves in emerging markets in the Western Pacific Region. Their marketing strategies and growth intentions are clearly stated in corporate annual reports as based on increasing total alcohol consumption by these populations. For example, Anheuser Busch sees great sales potential for Budweiser in China because 'current per capita consumption levels are only 20% of the levels of many developed countries'.⁴⁷

The large corporations entering new Asian markets predict high sales growth, citing lower average per capita consumption compared to neighbouring countries or to mature markets as a reason for doing so. For example, Carlsberg, which now has 20 breweries in West China and part-owns others in Laos, Malaysia, Singapore and now Cambodia, says that 'the potential for growth in the Cambodian beer market is significant as the beer consumption per capita is only about 6 litres per year, which is below the level in the neighbouring countries.' Anheuser Busch (Budweiser) with ownership or investment in 64 China breweries believes China is the most important beer market in the world outside the USA because 'current per capita consumption levels are only 20% of the levels of many developed countries'.

Although there is little research on the effects of alcohol sponsorships on consumption or patterns of drinking, there are very high levels of expenditure worldwide on this form of

alcohol marketing. As Diageo Australia's Bundeberg chairman said in 2005 about a 10-year A\$50 million deal between Bundaberg rum and rugby:

“Rugby has achieved record growth in participation, match attendance and TV audiences over the past five years, while Bundy has doubled in size during the period — it's hard to think that is a coincidence.”⁴⁸

3.2 Marketing strategies and expenditure

Large companies' global corporate strategies are in fact marketing strategies. In emerging markets in the Western Pacific Region, marketing is not just about the promotion of alcohol brands and drinking but about all the strategies that global alcohol corporations use to enter, supply and develop local markets. Review of recent corporate reports shows that global companies target growing or recovering economies, with high youth populations. They are buying or part-buying the largest competing local brewer or distillery, then marketing international and local brands together. Local acquisitions allow cheaper production of global brands, provides local distribution system and local know-how for marketing. Profitability comes from owning the most profitable global 'premium' brands and the most successful local cheaper brands in each market.

An example is SABMillers, now No.1 in West China as well as Africa. Its African experience means it operates particularly well in countries with limited infrastructure, using local ingredients and training farmers and other suppliers as needed. Rapidly entering new markets using the above described strategies, SABMillers now operates:

“...a continuum of businesses from emerging to mature; enabling us to benefit from both value and volume growth. In many cases, there's also an upward trend towards higher value brands as consumers enter the market at the bottom end and others progress towards the premium end.”⁴⁹

The large breweries' corporate reports provide no specific figures on what they spend on advertising and other forms of marketing. Some mention a sum for 'sales and marketing' which is likely to include distribution, client support, etc. Diageo, the world's largest spirits and wine company active in this region, spent over £1 billion (around US\$1,670 million) on marketing globally in 2005, including £587 million marketing on global priority brands and £128 million on ready-to-drink brands. Pernod Ricard, second largest wine and spirits corporation following acquisition of former No.2 Allied Dolmecq, spends around 23% of annual revenue on advertising, sponsorships and other marketing. Kirin, which plans to strengthen the Kirin brand and increase market penetration in Asia and Oceania, spent

Y168,918 million on promotion and Y64,104 m million on advertising in 2005 (over US\$2,000 million in total).

The economies of scale and cost savings that accrue from acquisitions and consolidation in new markets, company reports tell us, will free up resources for ‘increased investment behind brands’ – i.e. advertising and other marketing.⁵⁰⁻⁵²

In 2005 Pernod Ricard told shareholders it would be making a significant increase in advertising and promotion in both developed and emerging markets. Its sales to Asia, excluding Thailand, grew by 28% for the first quarter of 2006. Fosters increased its volumes in Asia by 15% in 2005 and plans to become ‘the most recognisable beer across Asia’. Increased ‘investment’ behind key brands in 2006 was also promised by Diageo (15% increase), Heineken (€100 million increase), Inbev (‘freeing up resources’) and Lion Nathan.

3.3 Importance of marketing in a globalised industry

The importance of advertising and other marketing strategies to the alcohol industry is explained by the concept of commodity chains – production and marketing networks of multiple firms operating across multiple countries. Globalised industries are able to utilise cost variations between labour markets, supported by advances in communications and transport. These shape decisions about what links in the global chain need to be owned directly by the corporation. This concept can be applied to the alcohol industry’s networks of local producers, importers, advertisers and distributors, with its changing use of exports, distribution agreements, brewing under licence, joint ventures, part-ownership or purchase of local plant or companies. Commodity chain analysis concludes that, to ensure profits accrue to shareholders, corporations should retain direct control over two links in the chain: design/recipe and advertising/ marketing.⁵³

As designs/recipes for alcohol beverages are broadly similar, what makes a ‘premium’ global product is partly an advertising strategy that targets the high end of the market, while parallel campaigns for local brands emphasize local origin and cultural traditions. Each brand image is tailored to a particular demographic or market segment. Branding communicates, reinforces and secures an emotional connection between consumer and product with the aim of making the product an integral part of the user’s lifestyle.²³

Commodity chain analysis highlights the importance of advertising and other marketing to a globalised alcohol industry. Policies that affect brand marketing will also affect sales, consumption levels and global profits. “It’s about the power of the brand,” says Fosters, who aim to become ‘the premium branded multi-beverage powerhouse in Asia Pacific’.⁵⁴

3.4 Corporate public relations and responsible marketing

Top global companies operating in the Western Pacific region describe alcohol sponsorships in a wide range of sport, arts and entertainment, as well as ‘community investments’ in environmental, charitable and youth-related projects. ‘Investing in local communities’ in this way is described in the corporate social responsibility reports that many of the largest alcohol companies released last year, reflecting the principles of the UN Global Compact with the international business sector. Community investments and sponsorships are available only in the markets in which the companies operate. A new approach combines community investment and corporate public relations linked to alcohol brands with disaster relief charity work.

Recently, some companies are adding responsible marketing statements to their corporate social responsibility policies. These are in-house policies directed to staff managers, either broad statements or more specific but fairly minimal rules along the lines of Article 15 of the EU Directive on Television Without Borders. They include statements of support for national industry codes of alcohol advertising standards and systems of self-regulation. Some policies, such as those of Allied Dolmecq and Inbev, stress the need for ‘responsible self-disciplined marketing’ in the industry to ‘protect our business from future regulatory restrictions to our current marketing and advertising freedoms’.

4. Responses to marketing: Research evidence from this region

Internationally there is now a considerable body of research that shows how alcohol advertising encourages positive perceptions about alcohol, typical drinkers, and how much other people drink. These perceptions help shape their subsequent drinking behaviour. Liking for advertising has been shown to be an important predictor of effect of advertising.⁵⁵

Among New Zealand boys, positive beliefs about alcohol have been linked to their response to alcohol advertising and to expectations of future drinking and/or current drinking behaviour. Structural equation modelling has indicated a likely causal pathway between

advertising and positive beliefs and consumption levels.⁵⁶ Among boys aged 10-17 year olds, those who recalled most alcohol ads were more likely to think it was okay for kids their age to get drunk, to think their friends drank frequently and consequently to drink more themselves^{57,58} – a pathway also shown in overseas studies.

In New Zealand a study which followed a group of children from birth to adulthood included questions about drinking and alcohol advertising. It found that responses to the advertising affected later consumption. The numbers of alcohol ads recalled at age 15 significantly predicted heavier drinking among males at age 18. Those who responded more positively to alcohol advertising at age 18 were heavier drinkers and reported more alcohol related aggression at age 21. By age 26, amounts but not frequency of drinking had declined for most of these young people. Those who had responded most positively to alcohol advertising at age 18 were the most frequent drinkers at age 26. Those who had established a relationship with a beer brand by age 18 were heavier drinkers and reported more alcohol-related aggressive behaviour at 21.^{55,59,60}

A qualitative study of people either currently receiving treatment for or in recovery from alcohol-related problems reported that seeing alcohol advertising on television had made it difficult for them to abstain. Themes in the ads – that it is normal to drink alcohol and that good times involve drinking – increased their feelings of social exclusion while abstaining.¹

Research in New Zealand has also explored the way new marketing techniques actively link alcohol into youth culture– through the internet, direct promotions at venues and events, sponsorship of concerts, DJs, musicians, free music. These target young drinkers in ways that are relatively invisible to older members of the population. The research shows that alcohol brand images and lifestyle marketing are providing young people with commercialised identities to adopt, along with the alcoholic products.^{23,39}

Research in Australia in 2001-2002 showed that young people were taking messages from alcohol ads that were contrary to the Australian Code. The messages they most frequently received from the ads was that the alcohol had mood changing effects, offered sexual or social success, and was 'easy to drink'. A quarter of 15-16 year olds and almost half the 19-21 year olds thought the ads were aimed at people 'younger or much younger than me'. A majority of university students thought all nine ads breached the code. Their perceptions were verified by marketing academics. Asked to judge ads against the code without knowing the Complaints Board's rulings, a majority thought seven out of nine breached the code.^{40,61}

5. International evidence on effects of marketing

There are two bodies of international research on the effects of alcohol advertising - statistical studies of the effect of advertising on consumption, and studies of young people's responses to alcohol advertising. These two bodies of research are now merging as statistical studies focus on measuring impacts on young people's drinking in particular and on indicators of alcohol-related harm, and studies of young people's responses are being contextualized with data on alcohol advertising in the media markets in which they live.

5.1 Statistical studies

Early statistical studies that measured advertising expenditure against consumption levels showed mixed results and little impact. All such studies so far have been in the 'mature' alcohol markets of the USA and Europe, so what these studies are trying to measure is the marginal effects of additional expenditure on advertising on drinkers and non-drinkers who have already been exposed to thousands of cumulative alcohol 'impressions'.⁶² Positive effects are, however, shown by recent studies that use less aggregated data; for example, by distinguishing between different beverage types, using data on amount and frequency of drinking among young people rather than by the whole population, and using quarterly rather than annual advertising expenditure data, for different media or in different local media markets. Disaggregated data captures sufficient variation in levels of advertising to provide the evidence that eluded early studies using only national and annual data.

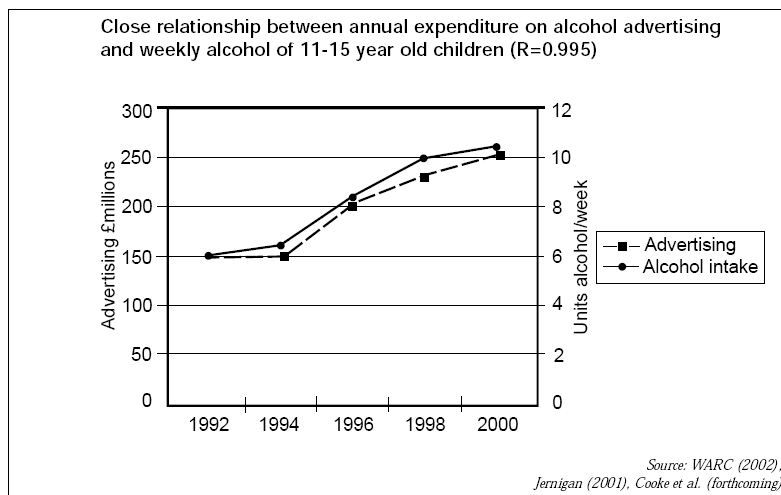
For example, a 1997 US study looking impacts on harm, used quarterly data for different regions of the USA to measure advertising expenditure against motor vehicle fatality data. After controlling for numerous other relevant variables, the study found advertising levels had an impact on motor vehicle fatality that was significant, although smaller than that of alcohol price. A subsequent study looked specifically at young people's drinking and the impact of alcohol advertising in their local environment. It used 1996-1998 data on alcohol participation, monthly and binge drinking by 12-16 year olds from two large national youth surveys and on alcohol advertising expenditure in five media for the localities in which the young people lived. Variables included income level and local beer price, as well as race and gender. This showed advertising had a positive effect on annual alcohol participation, monthly participation and binge participation, and higher prices had a negative effect.^{63,64}

In another US study, survey data on beer brand awareness, attitudes and drinking behaviours among 12-17 year olds at mid-western and eastern schools was matched against local alcohol advertising data. The beer companies that spent the most on advertising had the highest brand awareness, highest brand preference, highest brand use, and highest brand loyalty among the adolescents. Media and advertisements were a significant predictor of these four and also of intentions to drink at age 21.⁶⁵ (Research shows that ‘intention to drink’ is a good match with actual drinking at later ages.)

Recent longitudinal research in the USA interviewed 15-26 year olds four times over 1999-2001, randomly sampled within households and households within 24 media markets. Self-reported drinking and alcohol advertising exposure in the previous month was matched against local alcohol advertising expenditure on television, radio, billboards and newspapers. Those who saw more alcohol advertisements on average drank more. The number of drinks increased by 1% for each additional ad reported. Those in markets with greater alcohol advertising expenditures drank more. Drinks increased by 3% for each additional dollar spent per capita. Separate analysis of those under the legal drinking age (21) also showed an impact of alcohol advertisement exposure and expenditure on drinking. Young people in markets with more alcohol advertisements showed higher levels of drinking levels into their late 20s but, for those in markets with less advertising, drinking stabilised in their early 20s. Variables included age, gender, ethnicity, education and alcohol sales.⁶⁶

In the UK in 2004, the Academy of Medical Sciences⁶⁷ issued a report in response to alcohol policy changes that called attention to the impact of alcohol advertising on younger teenagers, as suggested in the following graph.

UK advertising expenditure at current prices and correlations with alcohol consumption among 11-15 year old children, 1992-2000



5.2 Studies of young people's responses to alcohol marketing

The effect of thousands of exposures to commercial messages about alcohol may be to encourage positive views of alcohol, with consequent effects on consumption.⁶⁸ Researchers have therefore looked at the impact of alcohol advertising on perceptions about alcohol and drinking, and how those positive perceptions in turn shape young people's drinking behaviour. It is now well established that beliefs about drinking norms and expectancies about drinking are important predictors of both current and future drinking by teenagers.

US research – like the New Zealand studies – shows that those children and young people who reported seeing the most advertisements were more likely to see the typical drinker as 'fun-loving, happy and good-looking. This in turn was linked to more favourable views about amounts, situations and the benefits of drinking. A survey of 12-22 year olds showed that those who were more exposed to alcohol advertising were drinking at higher levels than those less exposed.⁶⁹⁻⁷¹ A recent study looked at whether the impact of alcohol advertising exposure on intention to drink and actual consumption is mediated by how the young people respond to the advertising messages and positive expectancies about alcohol use. This was done through national telephone surveys of 15-20 year olds (under the US drinking age) and 21-29 year olds. Positive responses to alcohol advertising and 'information' from the ads led the teenagers to have positive expectancies about alcohol drinking, but not the adults.⁷²

A recent US focus has been on children's and teenagers' levels of exposure to alcohol messages. A Los Angeles study surveyed 12 year olds on drinking, recall of alcohol ads and whether they watched particular television programmes, with a follow-up survey 12 months later. It linked viewing more television programmes or sports coverage with alcohol ads with a disproportionate risk of beer use, wine and spirits, and three drink episodes the following year. This was most consistent for beer (the most advertised beverage).⁷³

Over a quarter of all US alcohol advertising expenditure, and over 80% of advertising expenditure for spirits (including ready-to-drinks), is in magazines, particularly youth oriented ones. A survey of 12 and 13 year olds at six schools in two western states looked at the effects of exposure to youth-oriented magazines on beliefs about teenage drinking, drinking expectancies, and drinking frequency in the past month. Analysis tested the simultaneous direct and indirect influences of music/entertainment, sports and men's lifestyle magazines, along with religiosity, parents' drinking, and number of best friends who drank. The number

of friends who drank was the strongest predictor of beliefs about the acceptability of teenage drinking, drinking expectancies, and current consumption. Music and entertainment magazines were most frequently read, and were linked with the belief that teenagers drink and with drinking expectancies, but not yet with current drinking. Reading sports magazines showed no influence, but this may relate to strong rules against alcohol use by student athletes at all six schools. Frequency of reading men's lifestyle magazines was positively associated with belief that teenagers drink, expectancies that drinking will bring positive outcomes, and number of drinks in the past month.^{74,75}

Alcohol advertising is reaching and influencing younger teenagers and children. Beer is advertised on free-to-air television in the USA and South Dakota research shows three-quarters of 9 year olds recognise the ferret in a Budweiser ad and a third could name the brand. Nearly a third could list three or more beer brands, and one in six recognised masked beer ads. Brand recognition was very much higher among 13 year olds. Knowledge was higher among those more exposed to alcohol ads in magazines, at sporting and music events and on television, and was dramatically higher among boys. At this young age, it appears that alcohol promotion that is part of direct daily experience – including in-store displays and beer stands at sports or music events – is as important as, or reinforces, the influence of television advertising.⁷⁶⁻⁷⁸

5.3 Brand images and 'lifestyle' marketing attractive to young

Alcohol marketing, local or international, focuses on targeting brands to different groups in the population. Brands have 'personalities' that a particular group of consumers can identify with, and brand image advertising focuses on and reflect the lifestyle of the user rather than the characteristics of the product. Research has shown that teenager drinkers and those who intend to drink in the future react more favourably to 'image' ads – and that is more about the image of the drinker than of the product. As one commentator points out, the latest Heineken ad in Australia makes no claims about the beer 'because most advertisers now realise we are more likely to respond favourably to their brands when they talk about us rather than them'.^{79,80}

Liking for alcohol ads is strongly linked to intention to purchase the product and the brand. In a study of what makes alcohol ads attractive to Californian teenagers, humour and story are rated more highly than music, animals or people depicted, (yet the three most favoured ads

used animal characters as leading actors). Ads focused primarily on product qualities (as under French law) or that referred to the legal age for purchase rated less well.⁸¹

A San Francisco study of 9-16 year olds shows how young people use logical and emotional processes as they respond to advertising messages and make eventual decisions about behaviour. Exposure to alcohol advertising was measured by hours of television viewing and programmes including sports coverage. How ads were interpreted was as important as the level of exposure, but the emotional route to behaviours dominated, with both younger and older boys and girls. The desirability of media portrayals of alcohol use predicted identification, which predicted liking of beer brands and positive alcohol expectancies. There was no significant relation between scepticism about the ads and drinking.⁸²

Although children have well-formed conceptions of intentions underlying commercial advertising by age seven or eight, they are not able to deploy these concepts effectively in their everyday lives until much later in development. Full capability in relation to judgements and consequences is not reached until the early 20s.⁸³

5.4 Evidence that discontinuing advertising can reduce drinking and harm

The World Health Organization's *Global Status Report: Alcohol Policy* (2004) reported on regulation and voluntary codes on alcohol advertising and sponsorship in its member countries. Relatively few countries prohibited all forms of alcohol advertising, but legislative restrictions on advertising were common for some media (usually television), for some hours of broadcasting, and/or for some beverage type (usually distilled spirits). Most Nordic countries, as well as nearly all Muslim countries, had complete bans on alcohol advertising in all media. Out of 37 countries in the WHO European Region, 29 prohibited or legally restricted spirits advertising on television, 28 restrict wine advertising and 23 restricted beer advertising on television. Few countries relied on voluntary codes alone. In fact, a number of western European countries were using both industry voluntary codes of advertising standards that operate within a legislative framework imposing at least some restrictions that reduce exposure to commercial messages promoting alcohol.^{34,84,85}

A study of data from 20 countries over 26 years has measured the effect of partial bans – on television, radio or print advertising for beer/wine or spirits. The results suggested that one more ban on beer and wine or on spirits would reduce consumption by about 5%, and one more ban on all alcohol advertising in a media would reduce consumption by about 8%. The

study also showed that alcohol advertising bans were more likely to be adopted in countries with rising alcohol consumption and less likely where drinking was declining.

Applying their work on alcohol advertising expenditure and young people's drinking to policy, these economists show that a ban on all alcohol advertising could reduce underage monthly alcohol participation by about 24% (almost as much as a 100% increase in alcohol prices) and would reduce participation in binge drinking by about 42%. Advertising bans in just some media – say, television and radio – may not reduce the total advertising spend, but will reduce the effectiveness of advertising in substitute marketing. This is not only because television is the most powerful medium but because in each medium there is a diminishing response from audiences to more messages. Partial restrictions are less effective or may shift sales to other beverage types. The more comprehensive the policy, the more effective it will be.^{86,87}

Other researchers applied these findings and US burden of injury and disease data to the cohort of 4 million Americans who were aged 20 in 2000. This suggested that a tax increase and an advertising ban would be the most effective interventions in the US market. They estimated that a complete ban on alcohol advertising would reduce deaths from harmful drinking by 7,609 and result in a 16.4% decrease in alcohol related life-years lost. A partial advertising ban, for youth oriented media only, would result in 4% reduction.⁸⁸

There is now a large body of evidence showing how alcohol advertising influences drinking behaviour. There are a limited number of studies on the effectiveness of advertising bans, but the above recent evidence suggests that it would be appropriate for governments to apply the Precautionary Principle and adopt comprehensive policies on alcohol marketing. It will be important that policy changes to restrict alcohol advertising, sponsorship and other marketing are evaluated so as to help build the international evidence base.

6. Concern among NGOs and governments in the region

Concern is growing in Western Pacific countries about increases in the commercial marketing of alcohol, and shifts away from traditional patterns of use of alcohol in many Pacific Islands and South East Asian countries.

In September 2004, at a meeting funded by the New Zealand Ministry of Health, personnel from non-government organisations and public health agencies in the Cook Islands, Fiji, Kiribati, Niue, Samoa, Tonga, China, Thailand and Sri Lanka met in Auckland to discuss concerns about alcohol with a focus on alcohol marketing.²⁶ In a number of countries concerns were expressed that aggressive alcohol marketing normalised alcohol use in a way which damaged aspects of traditional culture. At a further NGO meeting in December 2005, concerns were again shared and an NGO network was proposed to advocate for improved policies to control alcohol supply and alcohol marketing in the region (now established as the Asia Pacific Alcohol Policy Alliance (APAPA)).⁸⁹

Directly after the September 2004 meeting in Auckland, officials from Pacific public health agencies also attended a meeting of the Secretariat of the Pacific Community and WHO in Noumea. At both meetings, participants reported on issues related to alcohol supply, marketing and sponsorship in each of the countries represented. Although proportions of drinkers are currently relatively low in many Asian and Pacific Islands populations, those who do drink tend to do so heavily. There was little available data on alcohol related harm in these countries, but participants shared a growing concern about drinking by young people and the role of alcohol in domestic violence and crime.²⁶ In June 2005 the New Zealand Ministry of Health, SPC and WHO-WPRO co-organised a meeting of Pacific Health Officials to work together on an initial draft framework to minimise harm from alcohol in the Pacific, which drew attention to the need to regulate the marketing environment.

In New Zealand, a Private Members Bill is currently before Parliament to push the restriction on alcohol advertising on television back until after 9.30 pm and to return the minimum age of purchase to 20. This is one of a series of Private Members' Bills and supplementary amendments for regulation since alcohol advertising was permitted in the broadcast media.⁹⁰ In addition, a government sponsored review is currently under way to 'assess whether or not the current [self-]regulatory framework for alcohol advertising is in harmony with the aims of the government in regard to alcohol policy, and if not, what must be done to achieve this'. This review results from a public petition to Parliament that arose from dissatisfaction with industry self-regulation that brought forward the time restriction on television alcohol ads (see Section 7). The review was recommended by the parliamentary Health Committee that heard submissions on the petition.^{91,92} The government's 2001 National Alcohol Strategy includes an objective of reducing the exposure of children and young people to alcohol messages. The Ministry of Health has consistently recommended against alcohol advertising in the broadcast media.

In Australia, there has been long standing dissatisfaction with alcohol advertising standards and with rulings under advertising industry voluntary systems, which have repeatedly collapsed.^{40,61,93-95} In 2004 a review and threatened regulation by the Australia-wide Ministerial Council on Drugs prompted the industry to implement changes within a six month deadline (see Section 7).⁹⁶ The Drug & Crime Prevention Committee of the Victoria parliament expressed concern about alcohol advertising under industry voluntary codes and recommended a statutory regulation system be explored if evaluation showed the 2004 changes were not working. It also recommended research on the extent to which sponsorship of sporting cultural and other events may promote the harmful consumption of alcohol.

In China, there are concerns about increased exposure to alcohol advertising. Ads continue to infringe government regulations, despite monitoring by a government committee. Prescribed numbers of ads on television are exceeded; there are posters and billboards in public places, alcohol is frequently linked with national sporting success, and ads suggest that alcohol brings luck, physical strength and/or health.¹⁵

In Malaysia, there has been concern since the late 1990s about aggressive marketing by international companies, using advertisements and promotion tactics in bars and clubs that would not be permitted in many Western countries.¹⁸

In 2005, the World Medical Association also expressed its concern:

Alcohol advertising and promotion is rapidly expanding throughout the world and is increasingly sophisticated and carefully targeted, including to youth. It is aimed to attract, influence, and recruit new generations of potential drinkers despite industry codes of self-regulation that are widely ignored and often not enforced.⁹⁷

7. Examples of policy in the region

Policy on alcohol marketing is relatively weak in the Western Pacific region. Australia and New Zealand rely on industry voluntary codes of advertising standards and voluntary systems, and Japan on corporate in-house policies. A very few Pacific Islands countries have some legislation. Regulation by government is more common in East Asia.

7.1 Government legislation or regulation

Alcohol marketing is increasing in the Pacific Islands, and few governments so far address this in policy or legislation. Samoa's Liquor Act includes a section stating that advertising must not target young people, but does not address billboard advertising or alcohol sponsorships. In the Cook Islands, a 1998 Healthy Islands Committee recommended against all forms of alcohol advertising and sponsorship. As a result, alcohol ads are not shown on television, except during live sports coverage. Niue's broadcasting corporation does not permit alcohol advertising. France's Loi Evin doesn't apply in the Pacific Islands Territories, but New Caledonia recently banned ads in free newspapers, on t-shirts, at sports events, on radio and television and permitted ads are restricted to product characteristics. In Micronesia, Pohnpei State prohibits alcohol businesses from advertising.¹⁹

In Indonesia, the marketing and supply of alcohol is being restricted by an increasing number of districts implementing local government bans on the sale and consumption of alcoholic beverages. The Indonesian government regulates alcohol production, with only a few local companies holding licences to manufacture.⁴⁴

Before China's economic reforms in 1978, no alcohol advertisements were allowed in any media. Since 1978, alcohol advertising has grown considerably, mainly on television. Consumption has increased markedly from that date. Government policies, such as tax, seek to encourage consumption of beer and wine rather than spirits, including a 1998 ban on television advertising for alcohol over 40% abv. In 1996, regulations were passed that limit television to two ads between 7 pm and 9 pm with a maximum of 10 per channel per day at other times; a maximum of two ads an hour on radio; and two ads per issue for newspapers and magazines but not on front pages or covers. However, ad numbers are exceeded on many television channels. A survey of 154 channels showed an average of 17 ads per day and around three ads during peak time. Government regulations also prohibited ads from depicting the action of drinking alcohol, the visualizations of young people, actions that involve potential risk, such as driving car, boat and airplane etc.; directly or indirectly suggest unscientific outcomes, such as 'eliminate strains and anxiety', 'enhance physical strength', etc.; direct or indirect contribute personal, business or social success to alcohol; present the results of alcohol industry tests. The standard of alcohol advertising has improved considerably since 1996, but many ads infringe the regulations on content, particularly unscientific associations with luck or health. There are general advertising regulations against product comparisons, using national symbols and exaggeration. For example, Anheuser Busch had to provide statistical evidence that Budweiser was 'America's favourite beer'.^{11,15}

Regulation of advertising in Taiwan is overseen by the Government Information Office, and broadcast advertising on all television channels must be authorised. Alcohol advertising was severely restricted until recently, but was eased as part of Taiwan's bid to join the WTO. This was closely linked with pressure from trading partners, particularly the USA. Since June 1995 all alcohol types may be advertised after 9.30 pm on free-to-air television and after 9 pm on cable television. The ban on alcohol advertising in the print media was also lifted in 1996, but spirits ads are limited to 120 ads a year for new products only.¹¹

In Korea, which has a tradition of heavy spirits drinking, alcohol products over 35% abv may not be advertised in the broadcast media. Ads for other alcohol products are restricted to after 1 pm on radio and after 10 pm on television. No ads may be shown during youth programmes, actors must be over 20 years of age and no children's voices may be used. Claims may not be made that alcohol (or other products) remove stress or are necessary for social recognition, and no songs, special sales or sweepstakes may be used in alcohol ads.¹¹

In reviewing restrictions on alcohol advertising in mainland China, Taiwan and South Korea, advertising industry analysts note that internet and cable television are largely unregulated media.⁹⁸

In Malaysia, direct alcohol advertising is not permitted in the broadcast media or on billboards, except in the state of Sabah in East Malaysia. Alcohol advertising is permitted in cinemas, on video cassettes and the print media. Sponsorship activities are allowed.¹⁸

New Zealand has no legislation or regulation on alcohol advertising, but in 1999 it passed an amendment about promotions by bars, restaurants and licensed clubs. S.154 of the Sale of Liquor Act prohibits any business promotion, event or activity 'intended or likely to encourage persons on the licensed premises to consume alcohol to an excessive extent'. This came in response to problems, particularly in student towns, with pub events such as 'all you can drink' nights, free drinks for girls, drinking competitions and metre-long glasses that encouraged heavy drinking and raucous behaviour. Infringements can contribute to suspension or cancellation of the liquor licence, or can be prosecuted in the district court.

New Zealand has only weak sports industry guidelines on alcohol sponsorship, but it does provide an example of what can be achieved in its Smokefree legislation. It is not so long since many clubs, sporting and cultural events were funded by tobacco companies. This was prohibited by legislation which also created a funding organisation to assist in weaning clubs

off tobacco money and towards other fundraising opportunities or sources of corporate support.

7.2 Industry self-regulation

Japan has no legislation or industry formal voluntary codes on alcohol advertising and marketing. The two largest companies, Asahi and Kirin, have recently made statements about marketing responsibly. Asahi promises to avoid alcohol advertisements on daytime weekday television. Kirin implements ‘strict voluntary standards’ with little further information and notes the risk that sales of alcoholic beverages could decline in the long term if guidelines were implemented that were significantly stricter than currently envisaged. Neither regulation or industry standards addresses the look-alike non-alcoholic ‘Kid’s Beer’ (‘kodomo biiru’) put on the market by Tomomasu in 2005.

In both Australia and New Zealand, industry voluntary codes on alcohol advertising has proved satisfactory.

In Australia, alcohol advertising permitted on television at adult viewing times, as defined by the Commercial Television Industry Code 2003 – that is, after 8.30 pm – and as an accompaniment to the live broadcast of a sporting event on weekends. A 2004 Household Survey towards Australia’s recent adopted National Alcohol Strategy found that 71.4 per cent of the public would support alcohol ads on television being restricted to after 9.30 pm instead of the present 8.30 pm.⁶

The content of alcohol ads comes under a Alcoholic Beverages Advertising Code (ABAC), the ‘principals’ of which are the peak organisations of the spirits, beer, wine and retail industries, in association with the Federation of Australian Advertisers. The alcohol industry’s first voluntary code in 1989 collapsed in 1996 following public criticism. It took two years to establish a new code and in 2002 a pre-vetting system was added to the 1998 code.

Research in 2001-2002 showed that the system was not working well. Both young people and marketing academics considered that current alcohol ads were in contravention of the industry’s code of alcohol advertising standards, although approved by the industry’s pre-vetting system. Complaints were being dismissed by the Advertising Standards Board before they reached the more specialised and more independent Adjudication Panel for the alcohol

code.^{40,61} A study of Australian based internet websites for alcohol brands also found that these were also not satisfactory but were not covered by the code.⁹³

In 2003, a review of alcohol advertising was undertaken by the Commonwealth, State and Territory governments, which found that the ABAC was dysfunctional. It reported that the industry voluntary system lacked transparency, did not address public health concerns about alcohol advertising and did not apply to all forms of advertising. It was too slow in resolving complaints, 95% of which did not reach the alcohol-specific complaints committee. The review recommended that the code be extended to cover the internet and events promotions; that public health experts be included on the complaints panel; that rulings be faster and reports to government more transparent. Greater efforts should be made to sign up all alcohol producers to the code. Any failure to comply with the recommendations within six months would lead the Australian Ministerial Council for Drugs to consider regulation. The deadline was met. The industry now refers to the system as 'co-regulatory', although in fact no legislation or regulation was passed. However, the Ministerial Council has established some monitoring mechanisms.⁹⁶

The 2004 voluntary code covers internet ads, advertising by retail outlets and promotions at events, as well as advertisements in all media. Including the Australian-based websites under the code is an important step, despite the alcohol advertising and accessibility of websites based elsewhere. To summarise the code's rules, alcohol advertising must not encourage excessive or underage drinking, must not have strong appeal to children or adolescents, suggest alcohol contributes to significant mood change or social, sexual or sporting success, show any direct association between alcohol and vehicles, boats, sports activity including swimming and water sports or other hazardous activity.

Following the government review and code changes, a television ad in 2005 by Fosters, a founding signature of the alcohol advertising code, used the voluntary code on alcohol advertising as a part of its marketing. It referred to a previous ad that featured a barmaid serving Cougar bourbon drinks which, it said, had been withdrawn because of a (presumably imaginary) complaint by a Mr Trevor Hargold of Thornbraith Rd, Doncaster, Victoria who said he should be able to watch television without having to see attractive barmaids. It suggested that viewers take the matter up with Mr Hargold personally and concluded with the on-screen words 'You have been warned'.⁹⁹

New Zealand's industry code on alcohol advertising standards was a little stronger than Australia's. In 2003 the code was reviewed by the Advertising Standards Authority, a private

sector body representing the advertising and media industry. Submissions from the alcohol, advertising and media industries submitters pushed for New Zealand's rules to be the same as Australia's – including an earlier start time for television ads. Industry positions were also supported by sports organisations, as reliance on alcohol funding has made them allies. The Broadcasting Standards Authority's code on alcohol in television and radio programmes was reviewed at the same time. This joint process enabled the shifting of scheduling, 'hidden' advertising in programmes and free airtime for alcohol health promotion from the responsibility of the statutory BSA to that of the private industry ASA. Moreover, despite opposition from the Ministry of Health, the Alcohol Advisory Council and public health organizations, the ASA brought forward the start time for alcohol ads on television from 9 pm to 8.30 pm.

Ministers could do little unless the government chose to legislate. Industry self-regulation meant decision making power in this important area of alcohol policy had passed out of government hands. The matter is currently under review.⁹⁰

Experiences in Australia and New Zealand show that industry voluntary codes on alcohol advertising alone are unlikely to be satisfactory. Unless committees are independent of the industries involved, it is likely that liberal interpretations of rules and self-interested outcomes will eventually result. Research on systems of industry self-regulation in a wide range of fields has concluded that self-regulation works to the extent that there is a current and credible threat of regulation by government.¹⁰⁰ Unless any industry processes related to alcohol advertising standards come under a legal framework, and are monitored and reviewed by a government agency, governments may find that allowing industry self-regulation results in loss of policy control of the marketing of a product that impacts heavily on public health.

Most importantly, it should be recognised that voluntary codes which focus on the content of alcohol advertising do nothing to reduce exposure to alcohol brand messages.

Health economists in this field recommend that the more comprehensive the policy – that is, the more forms of media or other avenues for marketing are restricted to reduce exposure – the more effective it will be in reducing alcohol related harm, particularly among young people.

8. Policy options

A study of the most cost-effective interventions for WHO regions with differing patterns of disease and hazardous alcohol use found that in six sub-regions with high prevalence of heavy drinkers, the cost effectiveness of advertising bans was rated second only to alcohol taxation strategies, and more effective at less cost than restricted hours of trading. Taking into account costs already carried by existing policies, the lowest cost per DALY averted to be achieved in the Western Pacific sub-region A – Australia, New Zealand and Japan – would be from a 50% increase in alcohol tax and an advertising ban. For the Western Pacific sub-region B, including China, policies aimed at restricting supply and marketing of alcohol, including a ban, were estimated to generate greater health gains than other interventions.

The purpose of a comprehensive ban on alcohol advertising is to reduce public exposure, particularly of young people and other vulnerable populations, to commercial messages that promote alcohol and drinking. A comprehensive policy would include as many as possible of the following components:

- National alcohol policy documents and legislation on alcohol advertising stating clear government purposes: to reduce the exposure of young people and others to messages promoting alcohol in order to reduce alcohol related harm.
- Legislation to discontinue alcohol advertising in all or most media. These have been shown by research to be both effective and cost effective.
- Legislation to discontinue alcohol sports sponsorships of sports and culture. The importance of these sponsorships to the marketing strategies for major alcohol brands suggests that this requires policy attention.
- Legislation to restrict any permitted advertising to product description (similar to the Loi Evin)
- As part of this legislation, a legal framework requiring and monitoring industry activities in relation to any permitted forms of alcohol marketing. This would require a code of advertising standards and committees for pre-vetting, complaints and appeals that are *independent of industry interests*. Powers of sanction should also be considered.

- A government agency responsible for monitoring compliance with the legislation, levels of continuing exposure to alcohol promotion messages, especially the use of new technologies, and on-going reviews of public policy. Such monitoring of commercial pressures and of policy change and effectiveness should also be carried out by regional and international agencies.
- Legislation to prohibit irresponsible promotions at the retail level, that encourage excessive or rapid drinking. Regulation of alcohol promotions by bars and bottle shops can be enforced through licensing systems.

9. Benefits

Regional policy on restrictions on alcohol marketing benefit governments by supporting a regional approach and assisting them in their own national decision-making to reduce alcohol related harm, as part of a package of effective alcohol control policies. This background paper shares experiences in the region and makes some suggestions in regard to government regulation and industry activities within a regulatory framework.

Brand marketing, using a variety of media and campaign packages of sophisticated techniques, seeks to influence new young drinkers. There is no doubt, from the evidence of alcohol companies' own expectations, that alcohol marketing, if allowed to continue, will increase total population consumption in emerging markets in the region. In countries where markets and drinking are well established, alcohol advertising, sponsorships and other promotions contribute to the recruitment of young heavier drinkers, who consume a disproportionate share of the alcohol.

As well as contributing to the containment of alcohol consumption and alcohol related harm, policies that reduce commercial messages promoting alcohol will support the work of public health agencies. At present, policies and educational campaigns aimed to change the drinking cultures – in countries such as Australia, New Zealand, Japan, Korea – are being swamped by the brand campaigns of alcohol companies with huge resources. Their promotional messages normalising alcohol consumption also affect the policy environment, making it more difficult for responsible legislators to establish policies which are restrictive but proven to be effective.^{101,102}

For the alcohol industry, both domestic and international, there are also some potentially positive aspects in marketing restrictions. Many companies already recognise the need for more responsible marketing in the industry. Restrictions help to maintain a more level playing field between competitors. Regulation and any restrictions on marketing by government may also contribute in some way to profitability by stemming the upward spiral of expenditure on marketing that is now needed to maintain brand profiles against those of competitors.

Last but not least, restricting by regulation alcohol advertising, sponsorships and other promotions will benefit communities by contributing to the reduction of alcohol related harm. In many countries of the region, it will also assist by supporting traditional community values in regard to the consumption of alcohol and other drugs

10. References

1. Thomson, A., Bradley, E., Casswell, S., *et al.*, A qualitative investigation of the responses of in treatment and recovering heavy drinkers to alcohol advertising on New Zealand television. *Contemporary Drug Problems*, 24, 133-146, 1997.
2. Drugs and Crime Prevention Committee, Inquiry into Strategies to Reduce Harmful Alcohol Consumption: Final Report, Volume 1, Parliament of Victoria: Melbourne, 2006
3. Gual, A. & Colom, J., Why has alcohol consumption declined in countries of southern Europe. *Addiction*, 92(Supplement 1), S21-S32, 1997.
4. Jackson, M., Hastings, G., Wheeler, C., *et al.*, Marketing alcohol to young people: implications for industry regulation and research policy. *Addiction*, 95(Supplement 4), S597-S608, 2000.
5. Romanus, G., Alcopops in Sweden - a supply side initiative. *Addiction*, 94(Supplement 4), S609-S619, 2000.
6. Australian Government Department of Health and Ageing, *National Alcohol Strategy 2006-2009 : Towards Safer Drinking Cultures*, Commonwealth of Australia: Canberra, 2006
7. AC Nielsen, Nielsen Media Research-AdexPeriod: November 2002 October 2003, Australia,
8. Huckle, T. & Huakau, J., *Exposure and Response of Young People to Marketing of Alcohol in New Zealand*, Centre for Social and Health Outcomes Research and Evaluation (SHORE), Massey University: Auckland, 2006
9. Milne, D., Japan grapples with alcoholism crisis. *Psychiatric News*, 38, 23, 2003.
10. Milne, D., Alcohol consumption in Japan: different culture, different rules. *Canadian Medical Association Journal*, 167(4), 388, 2002.
11. Taylor, C. & Raymond, M., An analysis of product category restrictions in four major East Asian markets. *International Marketing Review*, 17(3), 287-304, 2000.
12. Euromonitor, Alcoholic Drinks in Singapore, 2006, accessed 20 July 2006, http://www.euromonitor.com/Alcoholic_Drinks_in_Singapore_
13. Euromonitor, Alcoholic Drinks in China, 2006, http://www.euromonitor.com/Alcoholic_Drinks_in_China_
14. Euromonitor, Alcoholic Drinks in South Korea, 2006, http://www.euromonitor.com/Alcoholic_Drinks_in_South_Korea_
15. Zhang, J. Alcohol advertising in China. Asia Pacific Meeting on Alcohol Policy, Auckland, September. 2004.
16. Euromonitor, Alcoholic Drinks in Taiwan, 2006, http://www.euromonitor.com/Alcoholic_Drinks_in_Taiwan_
17. Klein, N., No Space, No Choice, No Jobs, No Logo : Taking Aim at the Brand Bullies. 2000, Picador: New York, 2000.
18. Jernigan, D., *Thirsting for Markets: The Global Impact of Corporate Alcohol*, The Marin Institute for the Prevention of Alcohol and Other Drug Problems: San Rafael, California, 1997
19. Secretariat of the Pacific Community, Country Reports, 2005, <http://www.spc.int/health/>
20. Federal Trade Commission, *Self-Regulation in the Alcohol Industry: A Review of Industry Efforts to Avoid Promoting Alcohol to Underage Consumers*, Washington, DC, 1999 <<http://www.ftc.gov/reports/alcohol/alcoholreport.htm>>.
21. Hill, L. & Casswell, S., Alcohol advertising and sponsorship: commercial freedom or control in the public interest? *The Essential Handbook of Treatment and Prevention*

- of Alcohol Problems*, Heather, N. & Stockwell, T., eds., John Wiley: Chichester, pp. 339-359, 2004.
22. Buchanan, D. & Lev, J., *Beer and Fast Cars: How Brewers Target Blue-Collar Youth Through Motor Sports Sponsorship*. 1989, AAA Foundation for Traffic Safety: Washington DC, 1989.
 23. McCreanor, T., Moewaka Barnes, H., Gregory, A., *et al.*, Consuming identities: alcohol marketing and the comodification of youth. *Addiction Research and Theory*, 13(6), 579-590, 2005.
 24. Hill, L., *Alcohol Advertising and Sports Sponsorship on New Zealand Television, February-March 2000*, Alcohol & Public Health Research Unit, University of Auckland: Auckland, 2000
 25. Maher, A., Wilson, N., Signal, L., *et al.*, Patterns of sports sponsorship by gambling, alcohol and food companies: an Internet survey. *BMC Public Health*, 6(95), 2006.
 26. The Globe, Pacific Issue. Issue 1, 2005.
 27. Rekve, D., *Holdninger til Salgs: Slik utnytter alkoholindustrien idretten*, FOUL! Sports Sponsorship and the Drinks Industry (English draft). Alkokutt: Oslo, 1998
 28. Van Komen, G., Booze, beer and the 2002 Winter Olympics. *The Globe*, Issue 4, 2002.
 29. Herd, D., Changes in the prevalence of alcohol use in rap-song lyrics, 1979-97. *Addiction*, 100, 1258-1269, 2005.
 30. Mosher, J., Transcendental alcohol marketing: rap music and the youth market. *Addiction*, 100(9), 1258-1269, 2005.
 31. Thamarangsi, T., Alcohol Promotion and its Regulation: Thai Experience, July. Thai Health: 2006
 32. Global Information Inc., Alcoholic Drinks in Taiwan (Euromonitor International), 2005, <http://www.the-infoshop.com/study/eo31640-alcohol-taiwan.html>.
 33. Lubek, I. & Wong, M., Action research and the current Cambodian HIV/AIDS crisis. *Asian Psychologist*, 3(1), 21-28, 2002.
 34. World Health Organization, *Global Status Report: Alcohol Policy*, Department of Mental Health and Substance Abuse, WHO: Geneva, 2004 <<http://www.who.int>>.
 35. Chim, S., National Centre for Health Promotion, Phnom Penh. personal communication, 11 August, 2006.
 36. Borell, B., Te Ropu Whariki, Massey University, Auckland, Personal communication: Marketing and Youth Identity Project, 7 August, 2006.
 37. Chikritzhs, T., Catalano, P., Stockwell, T., *et al.*, Australian Alcohol Indicators, 1990-2001: Patterns of Alcohol Use and Related Harms for Australian States and Territories, National Drug Research Institute: Perth, 2003
 38. Australian Drug Foundation, Submission to the "Review of alcoholic beverages that may target young people" by the NSW Department of Gaming and Racing, February. 2004
 39. Casswell, S., Alcohol brands in young peoples' everyday lives: new developments in marketing. *Alcohol and Alcoholism*, 6, 471-476, 2004.
 40. Jones, S. & Donovan, R., Messages in alcohol advertising targeted to youth. *Australian and New Zealand Journal of Public Health*, 25(2), 126-131, 2001.
 41. Munro, G., An addiction agency's collaboration with the drinks industry: Moo Joose as a case study. *Addiction*, 99, 1370-1374, 2004.
 42. Statistics New Zealand, Alcohol and Tobacco Available for Consumption Year ended December 2005, Hot Off the Press. Wellington, 2006
 43. Euromonitor, Alcoholic Drinks in the Philippines, 2006, http://www.euromonitor.com/Alcoholic_Drinks_in_The_Philippines.
 44. Euromonitor, Alcoholic Drinks in Indonesia, 2006, http://www.euromonitor.com/Alcoholic_Drinks_in_Indonesia.
 45. Michel, C. WHO/SPC/ NZ Ministry of Health Follow-up Meeting to the 2004 SPC/WHO meeting on Alcohol and Health in the Pacific, 28 June. 2005.

46. Matthew Winter, School of Marketing, Curtin University, Perth, Personal communication, 14 September, 2006.
47. Anheuser Busch, *This Is Beer: Annual Report 2005*, St Louis, MO, 2006
48. B&T, Bundy sinks \$30m into Australian rugby, 9 November 2005, <http://www.bandt.com.au/news/5f/0c03865f.asp>.
49. Graham Mackey Chief Executive in., *SABMiller Annual report 2005*, London, 2006
50. Lion Nathan, *What Can I Get You? Annual Report 2005*, Sydney,
51. Pernod Ricard, *Annual Report 2004-2005*, p.17. Paris,
52. Heinken NV, *Annual Report 2005*, p.10. Amsterdam,
53. Jernigan, D., Applying commodity chain analysis to changing modes of alcohol supply in a developing country. *Addiction*, 95(Supplement 4), S465-S575, 2000.
54. Jamie Odelle in, *Edited transcript of investor teleconference*, 27 May. Fosters Group: 2005 <www.fosters.com.au>.
55. Casswell, S. & Zhang, J.-F., Impact of liking for advertising and brand allegiance on drinking and alcohol-related aggression: A longitudinal study. *Addiction*, 93, 1209-1217, 1998.
56. Wyllie, A., Zhang, J.F. & Casswell, S., Responses to televised alcohol advertisements associated with drinking behaviour of 10 to 17 year olds. *Addiction*, 93(3), 361-371, 1998.
57. Wyllie, A., *Love the Ads - Love the Beer: Young People's Responses to Televised Alcohol Advertising*, Doctoral thesis. Department of Community Health, University of Auckland, 1997.
58. Wyllie, A., Casswell, S. & Stewart, J., The response of New Zealand boys to corporate and sponsorship alcohol advertising on television. *British Journal of Addiction*, (84), 639-646, 1989.
59. Connolly, G., Casswell, S., Zhang, J.F., *et al.*, Alcohol in the mass media and drinking by adolescents: A longitudinal study. *Addiction*, 89, 1255-1263, 1994.
60. Casswell, S., Pledger, M. & Pratap, S., Trajectories of drinking from 18 to 26: identification and prediction. *Addiction*, 97, 1427-1437, 2002.
61. Jones, S. & Donovan, R., Self-regulation of alcohol advertising: is it working for Australia? *Journal of Public Affairs*, 2/3, 153-165, 2002.
62. Saffer, H., Studying the effects of alcohol advertising on consumption. *Alcohol Health & Research World*, 20(4), 266-273, 1996.
63. Saffer, H., Alcohol advertising and motor vehicle fatalities. *Review of Economics and Statistics*, 79, 431-442, 1997.
64. Saffer, H., Alcohol advertising and youth. *Journal of Studies on Alcohol*, Supplement No.14, 173-181, 2002.
65. Gentile, D., Walsh, D., Bloomgren, B., *et al.* Frogs sell beer: the effects of beer advertisements on adolescent drinking knowledge, attitudes, and behavior. *Biennial Conference of the Society for Research in Child Development, Minneapolis, Minnesota, April. 2001.*
66. Snyder, L., Effects of advertising exposure on drinking among youth. *Archives of Pediatrics and Adolescent Medicine*, 160, 18-24, 2006.
67. Academy of Medical Sciences, *Calling Time: The Nation's Drinking as a Major Health Issue*, Academy of Medical Sciences: London, 2004 <http://www.acmedsci.ac.uk/p_callingtime.pdf>.
68. Gerbner, G., Gross, L., Morgan, M., *et al.*, Living with television: The dynamics of the cultivation process. *Perspectives on Media Effects*, Bryant, J. & Zillman, D., eds., Lawrence Erlbaum: Hillsdale, NJ, pp. 17-40, 1986.
69. Atkin, C. & Block, M., *Content and Effects of Alcohol Advertising*, US National Technical Information Service: Springfield, VA, 1981
70. Atkin, C., Neuendorf, K. & McDermott, S., The role of alcohol advertising in excessive and hazardous drinking. *Journal of Drug Education*, 13(4), 313-323, 1983.

71. Atkin, C.K. & Block, M., The effects of alcohol advertising. *Advances in Consumer Research*, Kinnear, T.C., ed. Association for Consumer Research: Provo, Utah, pp. 688-693, 1984.
72. Fleming, K., Thorson, E. & Atkin, C., Alcohol advertising exposure and perceptions: links with alcohol expectancies and intentions to drink or drinking in underaged youth and young adults. *Journal of Health Communication*, 9, 3-29, 2004.
73. Stacey, B. & Elvy, G., Is alcohol consumption log-normally distributed among fourteen- to seventeen-year-olds. *Psychological Reports*, 48, 995-1005, 1981.
74. Center on Alcohol Marketing and Youth, *Overexposed: Youth a Target of Alcohol Advertising in Magazines*, Center on Alcohol Marketing and Youth: Washington, DC, 2002 <www.camy.org>.
75. Thomsen, S. & Rekve, D., The differential effects of exposure to 'youth oriented' magazines on adolescent alcohol use. *Contemporary Drug Problems*, 31, 31-58, 2004.
76. Collins, R., Schell, T., Ellickson, P., *et al.*, Predictors of beer advertising awareness among eighth graders. *Addiction*, 98, 1297-1306, 2003.
77. Collins, R., Ellickson, P., McCaffrey, D., *et al.*, Saturated in beer: awareness of beer advertising in late childhood and adolescence. *Journal of Adolescent Health*, 37, 29-36, 2005.
78. Ellickson, P., Collins, R., Hambarsoomians, K., *et al.*, Does alcohol advertising promote adolescent drinking? Results from a longitudinal assessment. *Addiction*, 100, 235-246, 2005.
79. Kelly, K. & Edwards, R., Image advertisements for alcohol products: Is their appeal associated with adolescents' intention to consume alcohol? *Adolescence*, 33(129), 47-59, 1998.
80. Mackay, H., Softening the hard sell. *The Age*, 10 January, 2004.
81. Chen, M.-J., Grube, J., Bersamin, M., *et al.*, Alcohol advertising: what makes it attractive to youth? *Journal of Health Communication*, 10, 553-565, 2005.
82. Austin, E., Chen, M.-J. & Grube, J., How does alcohol advertising influence underage drinking? The role of desirability, identification and skepticism. *Journal of Adolescent Health*, 38, 376-384, 2005.
83. Moses, L. & Baldwin, D., What can the study of cognitive development reveal about children's ability to appreciate and cope with advertising? *Journal of Public Policy and Marketing*, 24(2), 186-201, 2005.
84. Osterberg, E. & Karlsson, T., *Alcohol Policies in EU Member States: A Collection of Country Reports*, European Commission: Brussels, 2003
85. New Zealand Drug Foundation, *Advertising policies in other countries*, Wellington, 2006 <www.nzdf.org.nz>.
86. Saffer, H. & Dave, D., Alcohol consumption and alcohol advertising bans. *Applied Economics*, 30, 1325-1334, 2002.
87. Saffer, H. & Dave, D., *Alcohol Advertising and Alcohol Consumption by Adolescents*, NBER Working Paper 9676. National Bureau of Economic Research: Cambridge, MA, 2003
88. Hollingworth, W., Ebel, E., McCarty, C., *et al.*, Prevention of deaths from harmful drinking in the United States: the potential effects of tax increases and advertising bans on young drinkers. *Journal of Studies on Alcohol*, 67(2), 300-308, 2006.
89. APAPA - Asia Pacific Alcohol Policy Alliance, 2006, <http://www.apapaonline.org>.
90. New Zealand Drug Foundation, *Alcohol Advertising Policy in New Zealand: An Experiment in Industry Self-Regulation*, Wellington, 2006
91. Ministry of Health, *Steering Group to review alcohol advertising regulations announced*, Media release. 29 May. Wellington, 2006
92. Dr Viola Palmer and 2869 others, *Petition 2002/119*, New Zealand Parliament: 2004
93. Carroll, T. & Donovan, R., Alcohol marketing on the internet: new challenges for harm reduction. *Drug and Alcohol Review*, 21(1), 83-91, 2002.

94. Saunders, B. & Yap, E., Do our guardians need guarding? An examination of the Australian system of self-regulation of alcohol advertising. *Drug and Alcohol Review*, 10, 15-17, 1991.
95. Carroll, T. & Pedic, F., A Study of the Possible Association Between Alcohol Advertising and Adolescent Alcohol Consumption 1988-1989, National Campaign against Drug Abuse: Canberra, 1989
96. National Committee for the Review of Alcohol Advertising, *Report of the National Committee for the Review of Alcohol Advertising*, August. NCRAA: Melbourne, 2003
97. World Medical Association. World Medical Association Statement on Reducing the Global Impact of Alcohol on Health and Society. WMA General Assembly, Santiago. 2005.
98. Euromonitor, Alcoholic Drinks in Thailand, 2006,
http://www.euromonitor.com/Alcoholic_Drinks_in_Thailand_
99. GrogWatch enewsletter, Foster's takes off the gloves: "You've been warned". (36),
<http://www.caan.adf.org.au/newsletter.asp?ContentId=t10102005>, 2005.
100. Ayres, I. & Braithwaite, J., *Responsive Regulation: Transcending the Deregulation Debate*. 1992, Oxford University Press: New York, 1992.
101. Casswell, S., Public discourse on alcohol: implications for public policy. *Alcohol and Public Policy: Evidence and Issues*, Holder, H. & Edwards, G., eds., Oxford University Press: Oxford, 1995.
102. Casswell, S., Does alcohol advertising have an impact on the public health? *Drug and Alcohol Review*, 14, 395-404, 1995.