

Alcohol and NoLo advertising exposure in France: current trends and challenges

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Context

Impact of alcohol advertising on behaviours:

- **A proven link between exposure to advertising and drinking attitudes and behaviours, in particular among young people** (Anderson et al. 2009, Smith & Foxcroft 2009, Jernigan et al. 2017, Bain et al. 2022)

In France: the Evin Law (1991) regulates alcohol advertising

- **Media restrictions:** ban of ads on TV, cinema and press addressing young people ; ban for alcohol ads in specific time slots on radio
- **Type of contents:** positive, evocative images (or text) associating alcohol with pleasure, glamour, partying, sport, sex, or celebrities are banned

However:

- **Studies show that young and at-risk drinkers are often exposed** in France (Cogordan et al 2017, Gallopel-Morvan et al 2017, Mutatayi & Spilka 2019)
- Observation of a high volume of ads : **previous studies showed** high advertising investments on traditional medias, although decreasing (Quatremère et al. 2022)

2016	2017	2018	2019	2020
455 M€	369 M€	328 M€	305 M€	209 M€

- and the **use of the Internet by the alcohol industry**

Context

No alcohol and low alcohol (NoLo) : no media restrictions, whereas...



Objectives of the study:

- To quantify the amount of the advertising investments for alcoholic beverages and NoLo in France recently, including Internet
- To estimate the average number of ads seen/heard in France: to what extent are young people exposed to alcohol advertising despite the French Evin law?

Method

Evaluation of gross alcohol and NoLo advertising investments

- Principle: to identify the ads broadcasted and to assign them an amount based on the rates indicated in the advertising agencies' rate cards.
- Gross amounts of ads investments are public data declared by the advertising agencies
- Scope: investments in 2021-2025 on **radio, press, outdoor posters/billboards, TV and Internet** in France
 - Internet: display (banners, pop-up on websites), paid social (paid social media ads on Meta, Tiktok, Youtube), audio digital, paid search (ads displayed on search engine results pages), replay IPTV
→ limited data
- Collected by the specialist institute Kantar Media

Exposure to alcoholic and NoLo beverage Advertising:

- Based on the cross-referencing of advertising broadcast data (e.g. days and time slots) and audience data provided by specialized firms (Médiamétrie and ACPM)
- Scope : 2021-2025 – **radio, press** and **TV** exposure of people aged 13 and over in France
- Estimates performed by the specialist agency Dentsu International

Results: Advertising investments amounts

Alcohol advertising investments are still high:

- An increase between 2021-2023
- A decrease after 2023

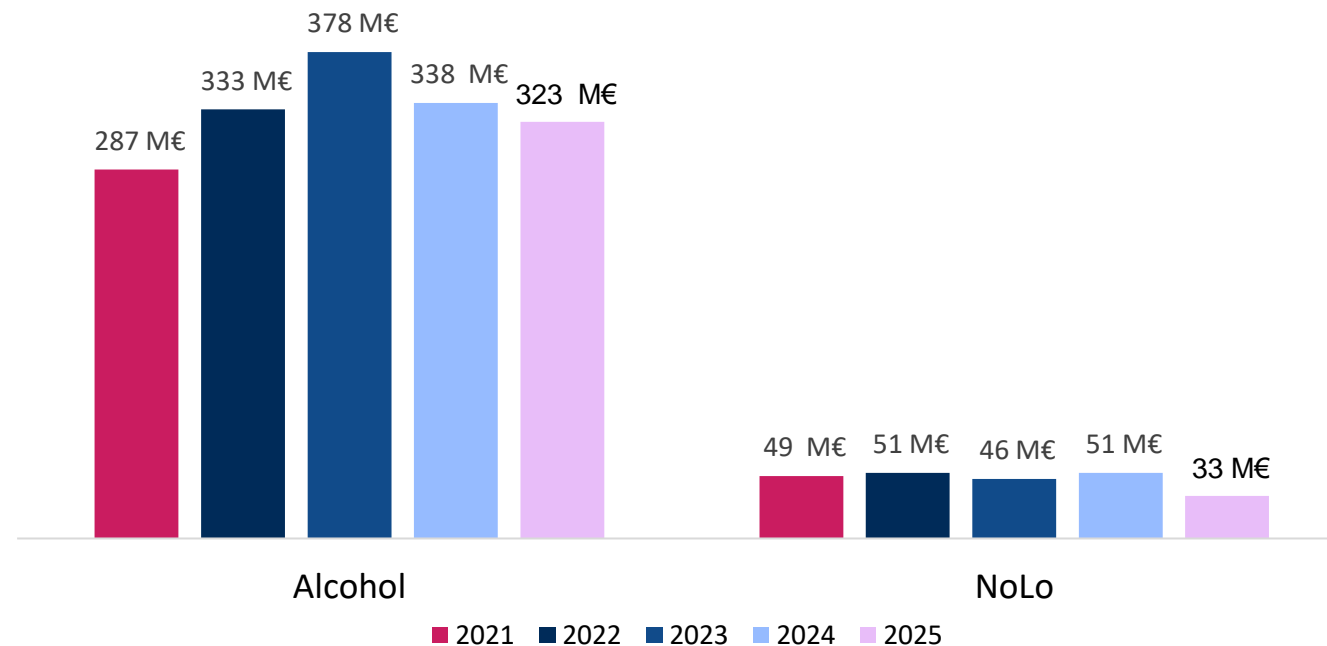
Products: mainly beer and wine

➤ Carlsberg, Heineken, ABInBev, Pernod Ricard

NoLo advertising investments: lower ads investments and more stable

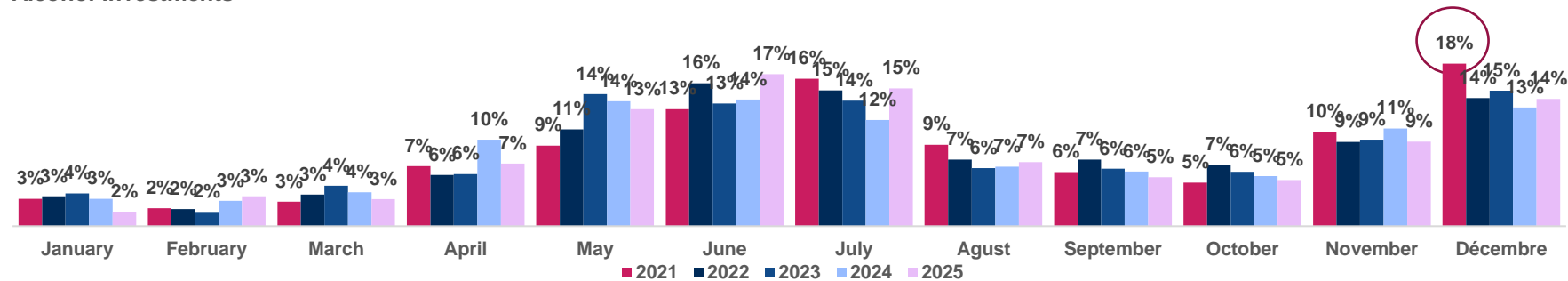
Products: mainly non-alcoholic beer

➤ Carlsberg, La Martiniquaise

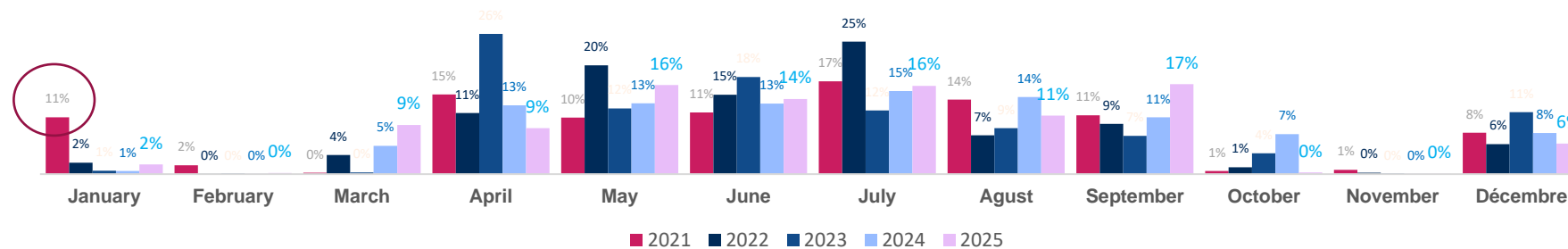


Proportion of monthly advertising spend on alcohol and NoLo

Alcohol Investments



NoLo Investments



Main investments in early summer and December of each year; less NoLo in winter

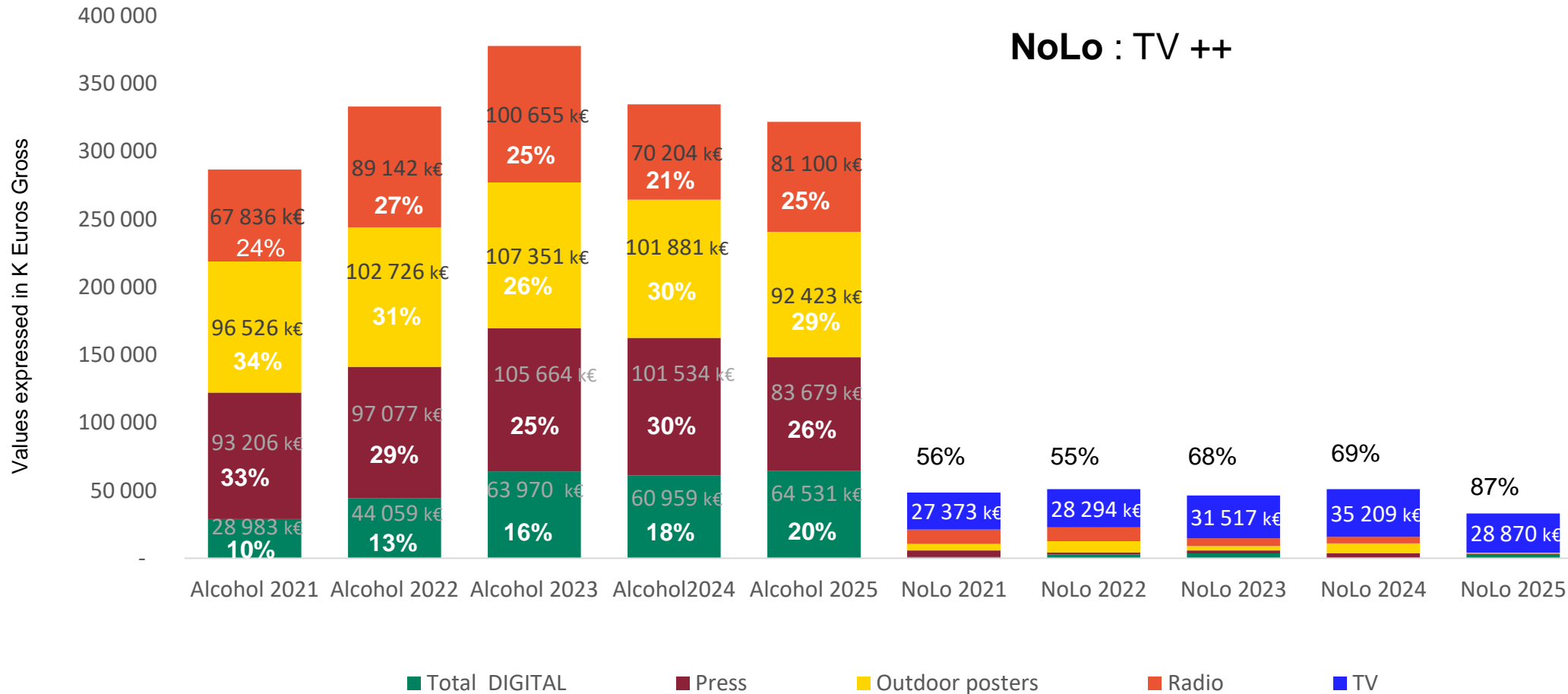
Related to context ?

- Covid in 2021: less investments and catch-up spending at the end of the year for alcohol, in January for NoLo
- Sportive events in France : Sept-Oct 2023 Rugby World Cup, July 2024 Olympic games?

Media distribution

Reallocation : press and outdoor posters → digital
(mainly paid social and digital audio)

NoLo : TV ++



Exposure to alcohol and NoLo advertising

Exposure to ads is measured by an **average number of contacts per individual per year** = average number of ads seen/heard per individual per year

Alcohol ads

	2021	2022	2023	2024	2025
Radio					
13-17 y/o	43	53	56	48	59
18-24 y/o	61	88	91	66	86
25-49 y/o	126	152	159	104	120
50 and over	151	133	147	101	101
Press					
15-17 y/o	34	33	35	31	23
18-34 y/o	46	45	48	44	33
25-49 y/o	39	38	42	39	27
50 and over	45	45	50	44	35

NoLo ads

	2021	2022	2023	2024	2025
Radio					
13-17 y/o	7	5	3	3	0
18-24 y/o	12	9	6	4	0
25-49 y/o	19	14	8	5	0
50 and over	10	6	3	2	0
Press					
15-17 y/o	4	2	1	2	0
18-34 y/o	4	2	1	2	0
25-49 y/o	4	2	1	2	4
50 and over	4	1	1	1	0
TV					
15-24 y/o	15	12	12	12	9
25-49 y/o	38	33	32	32	26
50 and over	69	67	68	73	55

➤ In 2025, almost 100 contacts on average for minors (<18y/o) with an ads for an alcohol or NoLo brands on these media
= 1 ad every 3 days

Conclusion and discussion

- **Underestimated data:** limited data on Internet, sponsorship in movies or TV-shows and other kinds of marketing operations, etc. are not included here

Ads invest. by alcohol compaignies	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Traditional media	455 M€	369 M€	328 M€	305 M€	209 M€	258 M€	289 M€	314 M€	274 M€	257 M€
Internet						29 M€	44 M€	64 M€	61 M€	65 M€
NoLo						49 M€	51 M€	46 M€	51 M€	33 M€

- **Massive advertising investments** by alcohol companies:
 - Financial resources of the Public Health sector vs alcohol industry: importance of social marketing to counteract merchant marketing, but how can prevention campaigns emerge?
- **Relative decline of alcohol ads expenditures on traditional media and reallocation towards digital (paid social and audio digital) and probably other marketing operations is confirmed**
 - A study on the strategies on social media will be conducted
- **Minors have a high risk of exposure** despite the Evin law, even through regulated media (radio++), and **exposure to ads of non-alcoholic drinks**, which contributes to brand notoriety... on TV!
 - WHO 2023: “NoLo marketing needs to be regulated to protect children, pregnant women and those seeking to stop drinking””

THANK YOU VERY MUCH FOR YOUR ATTENTION

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