A person wearing a dark Guinness Pro Soccer jersey and black socks is blowing a whistle. The background is a blurred outdoor setting, possibly a sports field. The entire image has a blue tint.

Time to blow the whistle on alcohol sport sponsorship

Recommendations for action

MARCH 2020



Alcohol Focus Scotland (AFS) is the national charity working to prevent and reduce alcohol harm. We want to see fewer people have their health damaged or lives cut short due to alcohol, fewer children and families suffering as a result of other people's drinking, and communities free from alcohol-related crime and violence.



Scottish Health Action on Alcohol Problems (SHAAP) represents the Medical Royal Colleges in Scotland and the Faculty of Public Health in Scotland, providing the authoritative medical and clinical voice on the need to reduce the impact of alcohol-related harm on the health and wellbeing of people in Scotland and the evidence-based approaches to achieve this.

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EXECUTIVE SUMMARY

Sport sponsorship provides an important and unique route for alcohol companies to promote their brands. It capitalises on our love of sport and emotional connections to our teams and players, so that we associate alcohol brands with healthy activity and high-performing athletes.

New research from the Institute for Social Marketing and Health at the University of Stirling illustrates the extent, nature, and frequency of alcohol sponsorship in professional* football and rugby union in Scotland. The key finding is that while only a small proportion of football and rugby union sponsors are alcohol companies,† the wraparound nature of alcohol sponsorship means that when it is present, it is frequent and pervasive. Sport sponsorship provides alcohol companies with a high-profile and highly attractive means of reaching large numbers of people, influencing how much and how often they consume alcohol. These findings highlight the need for statutory restrictions to protect people – particularly the young and vulnerable – from the influence of alcohol sport sponsorship.

Sport should be something that inspires good health and active participation, and its use as a promotional vehicle for addictive and health-harming products is inappropriate.

Alcohol Focus Scotland (AFS) and Scottish Health Action on Alcohol Problems (SHAAP) recommend that the Scottish Government should end alcohol sponsorship of professional sport, ensuring that comprehensive and robust restrictions form part of a broader strategy to control alcohol marketing in Scotland.

* We note that a number of the teams in the lower leagues of the Scottish Professional Football League and the Scottish Women's Premier League are not professional. However, for the purposes of this report, the term professional is used throughout.

† Alcohol companies refer to alcohol producers and distributors but not retailers selling the products.

BACKGROUND

Despite recent reductions in average alcohol consumption,¹ Scotland's problematic relationship with alcohol continues. Around a quarter of adults drink above the Chief Medical Officers' low-risk drinking guidelines,¹ and a fifth of 15 year olds report drinking alcohol in the past week, an increase from previous years which counters the long-term downward trend in alcohol consumption among children.² Nearly 4,000 people die as a result of alcohol each year in Scotland,³ with alcohol death rates currently twice what they were 30 years ago and almost double those of our English neighbours.¹

Alcohol companies invest billions of pounds a year in marketing their products,⁴ aiming not only to increase market share, as they commonly claim, but also to increase consumption, target heavy drinkers and recruit new drinkers.^{5,6} Exposure to this marketing activity is associated with drinking initiation and increased alcohol consumption.^{7,8,9,10,11}

Young people and those in recovery from alcohol dependence are particularly susceptible to the influence of alcohol marketing.

Recent research, which used the same methodology – the Bradford Hill criteria – which was used to establish the causal link between tobacco and cancer, has revealed that alcohol marketing exposure is a cause of binge drinking and drinking onset among young people.¹²

It also influences their attitudes¹³ and increases their likelihood of developing problems with alcohol later in life.¹⁴ For people who have experienced alcohol problems, alcohol marketing is a common 'environmental trigger' for relapse as it stimulates the desire to drink. Those in recovery from alcohol dependence have highlighted "the persistent availability and marketing of alcohol" as a significant risk to their abstinence or moderation.¹⁵

Although research into the effects of alcohol marketing has focused on the young, it is likely that the widespread marketing of alcohol contributes to the high levels of alcohol consumption, and associated harm, experienced by the general population.^{7,16} This has led the World Health Organization to encourage countries to implement controls on alcohol marketing, which they identify as one of the three 'best buys' for alcohol policy,¹⁷ and as a high-impact strategy for reducing the harmful use of alcohol and related consequences.¹⁸

Sport sponsorship provides an important and unique route for alcohol companies to promote their brands. By capitalising on the existing appeal and emotional connections that we have with sports teams and competitions, sponsorship provides alcohol companies with a high-profile opportunity to reach larger and more captive audiences than may be possible through other marketing activities. Sport sponsorship has also been associated with increased consumption and drinking onset amongst children and adults who play sport.¹⁹

AFS and SHAAP commissioned the Institute for Social Marketing and Health at the University of Stirling to examine the extent of alcohol sponsorship in professional football and rugby union in Scotland, with a view to addressing a number of gaps in our current understanding. These include the extent of alcohol sport sponsorship, what forms alcohol sponsorship takes, and how frequently viewers and spectators may be exposed.

Three interlinked studies were undertaken:

1. An open source audit of official sponsorship arrangements, to assess the extent to which football and rugby union teams and organisations in Scotland are sponsored by alcohol companies.
2. Four in-depth case studies, to scope the different marketing activities that are utilised to promote partnerships between football and rugby union teams and alcohol companies.
3. A frequency analysis of all verbal and visual references to alcohol marketing observed in seven televised broadcasts of professional football and rugby union matches in Scotland.

All data were collected in 2018 and 2019, and mostly relate to the 2018/2019 sporting season. Full methodology and findings are reported in, *'The extent, nature, and frequency of alcohol sport sponsorship in professional football and rugby union in Scotland'*.²⁰

This report provides an overview of the findings, with discussion of what this means for alcohol sport sponsorship in Scotland and recommendations from AFS and SHAAP for the Scottish Government.

RESEARCH FINDINGS

The extent of alcohol sport sponsorship

- Overall, alcohol companies represented only 7% of the main sponsors or partners recorded in the audit, with support received from a diverse variety of other companies (ranging from construction and building firms to IT and digital services).
- The majority of the teams audited (61%) had no sponsorship relations with alcohol companies.
- The proportion of alcohol sponsors was higher among rugby union teams (15% of all sponsors) than for football teams (4% of all sponsors).
- The rugby union teams and organisations audited had at least four alcohol sponsors or partners each.
- Alcohol sponsorship was less prevalent in football; a third of the teams and organisations audited had at least one alcohol sponsor or partner.



Image 1: Example of sponsor branding on pitch-side hoardings

- Among the football teams, alcohol sponsorship appeared more prevalent within the Scottish Premier League (half of the teams had at least one alcohol sponsor) compared to the Scottish Championship (a third of the teams had at least one alcohol sponsor).
- Due to a lack of publicly available information, it was not possible to identify the total monetary value of alcohol sponsorship to each club or organisation, or how this compared to sponsorship from other sources.
- Other sponsors that had an association with alcohol such as the hospitality sector (e.g. hotels, restaurants, pubs), constituted a small proportion of overall sponsors.



Image 2: The Tennent's Up & Under Bar at Murrayfield stadium



Image 3: Magners printed on the back of the team shirts

The wraparound nature of alcohol sport sponsorship activities

The case studies found that alcohol sport sponsorship represents a variety of sophisticated and often interconnected activities, including:

- alcohol brand logos on match and training strips;
- advertising inside and outside the stadiums;
- exclusive 'pourage rights'[‡] within the stadiums and fan zones;
- limited edition products which feature the names of teams and their achievements;
- extensive social media activity (including interactive content);
- partnership activity promoting the brand or product via visits to breweries and distilleries;
- competition tie-ins; and
- players, managers or coaches featuring in adverts.

By featuring players in social media adverts for alcohol brands, it appears that these players are endorsing the products.



Image 4: Example of limited edition products



Image 5: Training kit sponsors get regular exposure as images of the team training are used on social media, the club website, and in print and broadcast news reports

[‡] Where the sponsor has a commercial agreement to sell or supply their products at specified events.



Image 6: Example of advertising inside stadiums

Purchasing or consuming the product then may become aspirational for the consumer in order to emulate, or be similar to, their sporting heroes.

Likewise, releasing limited edition products that feature a specific event or achievement as part of the name or packaging means that fans are enticed to purchase these items in order to feel as though they are part of the event and share in their team's achievements.

The wraparound effect of alcohol sponsorship was most pronounced among the most high-profile teams. In these cases, alcohol sponsorship appeared through a variety of interconnected marketing activities associated with the club, ranging from the logos on their shirts and/or training kits, brand presence on social media (which engages fans throughout the week, not just on match days), and sales in their hospitality area.

The frequency and nature of alcohol sport sponsorship in televised broadcasts

- Viewers were frequently exposed to alcohol marketing during televised broadcasts for football and rugby union.
- Most alcohol marketing references appeared in prominent places and during the match. Examples included static and electronic pitch-side advertising and sponsorship logos on players' shirts.
- Alcohol marketing references were most frequent in the televised broadcasts of rugby union.

During the live Six Nations rugby union match between Scotland and England there was an alcohol reference every **15 seconds**.



- Almost all alcohol marketing references during this broadcast involved explicit promotion of a brand, particularly through the use of logos and slogans. The remainder were of alcohol being consumed in the crowd.



Image 7: Pitch-side hoardings are visible throughout matches to spectators, on the TV and in reproduced media

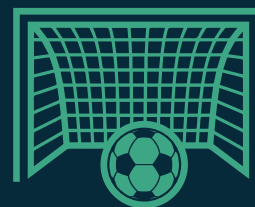


Image 8: Glen Moray logo positioned on back of shorts can be seen during scrums and so is commonly visible during matches and reproduced media

- Attempts were made to analyse a Scottish club-level rugby union match but there were so many references visible throughout that it was not possible to code. This included logos on all player and match official shirts, pitch-side advertising, and advertising on posts around the pitch and on corner flags.
- There were no references in the international football matches analysed.

There was an alcohol marketing reference every

- **98 seconds** in the live Scottish Premier League match
- **71 seconds** in the live Scottish Cup Final
- **57 seconds** in the highlights of Scottish Premier League football



DISCUSSION

Alcohol sport sponsorship in Scotland: small numbers, big impact

This new research provides, for the first time, insight into the extent, nature, and frequency of alcohol sponsorship within Scotland's most popular spectator sports, football and rugby union. The findings suggest that despite alcohol companies constituting a small proportion of the overall number of sponsors in football and (to a lesser extent) rugby union, the comprehensive and sophisticated nature of sponsorship activity exposes people in Scotland to high levels of alcohol marketing.

Tens of thousands attend matches in person every week²¹ alongside the millions who watch televised Scottish football and rugby union.^{22 23 24} In line with previous research, this study demonstrates that televised broadcasts of professional sports provide a high-profile platform for exposure to alcohol marketing.^{25 26 27 28} In addition, the multifaceted and sophisticated nature of alcohol sponsorship ensures it is highly visible and stands out to consumers, drawing upon a variety of techniques to both explicitly promote products (e.g. pitch-side advertising) and subtly blend them among existing attractive and stimulating content (e.g. logos on players' match shirts).

It is also clear that many sponsorship activities blur the line between marketing content and promotion of the sports team. This is particularly evident on social media.



Image 9: Branding is highly visible on posts, the ball and players' strips

For example, social media posts included photographs showing players training in alcohol branded kits and holding branded shirts, players featured in video marketing on YouTube, and brand logos displayed during live match updates. In such cases, the posts appear to simply be promoting the team and their players, yet the alcohol sponsorship is subtly omnipresent, not just on match day but every day.

This is in keeping with the increased focus (and associated spending) by alcohol companies on digital and social media marketing.^{29 30} By targeting specific groups of consumers and encouraging active engagement with the brand, including peer sharing, digital marketing is more effective in capturing and capitalising on the attention of consumers than traditional forms of marketing. Digital media, such as watching videos and social networking, are particularly popular among children and younger people.^{31 32} The sophisticated nature of this activity makes it difficult for young people to recognise that they are being marketed to.³³



Image 10: Magners have a presence throughout hospitality areas at Celtic Park



Image 11: Example of sponsor advertising outside the stadium

Why sport sponsorship matters

Billions of pounds are invested each year by alcohol companies in marketing their products.⁴ This is with an aim not only to increase market share, as they commonly claim, but also to increase consumption, target heavy drinkers and recruit new drinkers.^{5,6} Exposure to such activity has been associated with increased alcohol consumption and drinking initiation.^{7,8,9,10,11}

Sport sponsorship has also been found to reach and influence children and young people.

A recent survey found that almost a third of 11-19 year olds in the UK recalled seeing alcohol sponsorship for sports or events at least weekly, while one in twenty recalled seeing alcohol sponsorship daily or almost daily.³⁴

Young people are also able to recall specific brands they have seen sponsoring sporting events or teams,³⁵ and exposure to alcohol sport sponsorship has been shown to influence drinking behaviour, increasing consumption amongst young people.¹⁹



Image 12: Pitch-side hoardings are highly visible throughout matches



Image 13: Drawing of football pitch-side advertising by child at Children's Parliament workshop

In Scotland, research found that children aged 10-11 years old strongly associated football clubs and tournaments with the beer brands that sponsor them; almost half of all children (47%) and 60% of boys correctly associated Carling beer with the Scottish national football team (Carling sponsored the Scottish Football Association until 2014).³⁶

In 2019, Children's Parliament Investigators found 9-11 year olds had awareness and knowledge of alcohol sport sponsorship.³⁷ For instance, during a school workshop, one child drew football pitch-side advertising and spoke of the specific sponsorship activity he had encountered:

“The Champions League sponsor is Heineken. The logo is green and black. At the start of the match, they announce the sponsor and you can see the adverts all over the stadium.”

The Children's Parliament Investigators called for an end to alcohol sponsorship of events at which children may be present in order to ensure all children grow up in an environment free from the negative impact of alcohol.³⁷

Value of alcohol sport sponsorship

The financial details of sponsorship deals are rarely disclosed by sponsors or recipients, meaning little information is publicly available about the financial value of sponsorship deals. Nonetheless, this new research helps us draw some inferences regarding the potential significance of alcohol sport sponsorship.

It shows that alcohol sponsors are attracted to sporting organisations that offer the largest opportunities for people to see their messages, such as through potential for televised matches and thousands of fans attending live matches. Larger or more successful teams were more likely to be sponsored by large international alcohol brands, whereas alcohol-related sponsorship of the smaller club from the lower league was limited to advertisements within the stadium for local on-trade hospitality premises.

This suggests that any restrictions on sponsorship by alcohol companies would directly affect a minority of clubs, and may have less impact on smaller or lower-league clubs, as they appear to be less dependent on alcohol companies for sponsorship. In addition, larger or more successful clubs are plausibly more likely to attract replacement sponsors given their popularity and visibility.

Previous experience suggests that placing restrictions on what can be marketed during professional sport does not have any lasting negative impacts. For example, the money coming into Australian sport did not reduce after a federal ban on tobacco advertising and sponsorship was imposed, with revenue actually increasing by 45% between implementation of the ban in 1996 and 2000.³⁸ Furthermore, a UK simulation estimated that 86% of lost revenues would be replaced immediately by other sponsors



Image 14: Example of small pitch-side hoardings for local businesses

if a comprehensive ban of alcohol and gambling sponsorship were implemented.³⁹ Recent figures illustrate that sponsorship and commercial revenue made up only 26% of total SPL revenue in 2018: the majority of revenue came from TV deals, UEFA and gate receipts.⁴⁰

The experience of the governing body Scottish Women's Football (SWF) in refusing sponsorship from alcohol companies^{41 42} for the past few years demonstrates that sports organisations can thrive without it. SWF view alcohol sport sponsorship as incompatible with their goals of promoting a healthy lifestyle and believe positioning themselves as a 'clean' sport is beneficial not only to those who participate in and follow women's football, but also to the long-term growth and sustainability of their business.⁴³

SWF believe positioning themselves as a 'clean' sport is beneficial not only to participants but also to the growth and sustainability of their business.

Learning from elsewhere

Experience from restricting tobacco marketing in the UK and alcohol marketing in France suggests that the most effective way to protect people from exposure to alcohol marketing is to introduce comprehensive restrictions on a statutory basis, with robust monitoring and enforcement backed by sufficient sanctions.

Key lessons from tobacco

Sport sponsorship restrictions for tobacco were introduced in the UK as part of a comprehensive package of measures through the Tobacco Advertising and Promotion Act 2002. Regulations provided for time-limited exceptions to the prohibitions of these channels, with the ban coming into effect in July 2003 for domestic sport and July 2005 for world sport.

Research on the impact of tobacco promotion and advertising restrictions showed a decline in awareness of tobacco sponsorship in countries where a ban was imminent (Canada and the UK), compared to countries where regulation was unchanged (Australia and USA).⁴⁴ It was suggested that this decline was probably

due to a decrease in the number and promotion of sponsorships as the prohibition date neared, with contracts not being renewed or extended. The research also highlighted the importance of not allowing exemptions, showing significantly higher levels of awareness of sport sponsorship where exemptions were allowed (e.g. Formula One racing).⁴⁴

Although the UK tobacco legislation included restrictions on some indirect advertising through its brandsharing regulations,⁴⁵ tobacco companies continued to promote their brands indirectly through 'alibi marketing'. This is where conventional logos or brand names are replaced with key, identifiable components of the brand identity. Marlboro displayed white bar codes that closely resembled their cigarette packs on Formula 1 cars for five years after the sponsorship ban came into effect.⁴⁶ These are longstanding tactics used by tobacco companies⁴⁷ and highlight the need for careful drafting of the legislation to take into account contemporary marketing practices and to avoid the exploitation of any legislative loopholes.



Image 15: Ferrari race car and the driver's clothing in early 2010

Key lessons from France

The French Évin Law (the 'Loi Évin'), in place since 1991, lists the specific situations in which alcohol advertising is allowed and bans any activities that are not explicitly permitted. Sponsorship of cultural and sporting events is not listed and is therefore prohibited. The legislation successfully prevented Budweiser from sponsoring the World Cup held in France in 1998, with advertising rights sold to electronic goods company, Casio.⁴⁸ The legislation also limited Heineken's sponsorship of the European Rugby Champions Cup before 2014 to the name 'H Cup' in France.⁴⁹

When compared with those found by the same researchers in the UEFA EURO 2016 tournament held in France, the alcohol marketing references in the new Scottish study were both more frequent and more explicit.⁵⁰

This suggests that France's prohibition of sport sponsorship is more effective in controlling the volume and explicitness of marketing than the self-regulatory approach employed in Scotland. In keeping with international research that has questioned the effectiveness of self-regulatory codes,^{51 52 53 54} this demonstrates the clear advantages of statutory regulation.

The fact that some alcohol marketing did take place at the EURO 2016 tournament in France, where sport sponsorship is prohibited, shows that alcohol companies will seek to undermine restrictions that are in place. Mirroring the tactics used by tobacco companies in response to marketing restrictions, such activity strongly signifies the need for rigorous monitoring and enforcement of restrictions, and sufficient sanctions that would outweigh any potential benefits of circumventing them.⁵⁰



Image 16: Alibi marketing during UEFA EURO 2016

RECOMMENDATIONS

1 The Scottish Government should end alcohol sponsorship of professional sport.

Alcohol sport sponsorship promotes a culture of harmful alcohol use, and influences drinking behaviour.^{12 19} Given the evidence that self-regulation of alcohol marketing is not effective in reducing exposure,^{51 52 53 54} and the causal association between exposure and underage drinking,¹² the Scottish Government should bring forward proposals for legislation to ban alcohol sponsorship of professional sport.

2 Restrictions on alcohol sport sponsorship should be comprehensive and robust.

Sport sponsorship is a sophisticated mix of interconnected activities. The experience of restricting tobacco sponsorship and of implementing alcohol sponsorship restrictions in other countries demonstrates the necessity of regulations that are comprehensive and robust in nature.

Statutory restrictions on alcohol sport sponsorship should cover all marketing activities, including:

- alcohol brand logos on match and training strips;
- advertising within stadium grounds;
- exclusive 'pourage rights' within stadiums and fan zones;
- sports iconography on alcohol products (and vice versa);
- social media activity;
- competition tie-ins;
- players, managers or coaches featuring in adverts;
- partnership activity promoting brands or products; and
- brandstretching and alibi marketing practices.

Such an approach minimises the opportunity for displacement of sponsorship activity and helps future-proof against innovative marketing strategies.

3 A rigorous and independent monitoring and enforcement programme should accompany sport sponsorship restrictions

Adequate regulation requires a credible threat of enforcement. Robust sanctions, such as substantial financial penalties, are necessary for restrictions to be effective and meaningful.⁵⁵ A rigorous monitoring and enforcement programme is required both to ensure compliance and to enable sanctions to be applied in a timely manner. This would also allow the regulations to be kept under review, ensuring they remain effective in light of market innovation.

Monitoring and enforcement arrangements must be fully transparent and independent from the alcohol and advertising industries and any other commercial interests where there could be a conflict of interest.

4 Sport sponsorship restrictions should form part of a broader strategy to address alcohol marketing

Sport sponsorship is only one of a range of activities used to market alcohol products. Analysis of internal advertising agency documents has highlighted the importance of the cumulative effect of the 'marketing mix' as a whole in the promotion of unhealthy products.⁵⁶ The greatest impact on reducing harmful alcohol use would be achieved through a comprehensive ban on alcohol marketing, including advertising, promotion, and sponsorship, as opposed to a ban on certain forms of marketing only.⁵⁷

The forthcoming Scottish Government consultation on alcohol marketing, expected later this year, should include consideration of wider restrictions on alcohol marketing.

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