



**MillwardBrown**  
Lansdowne

**Annual Tracking Research  
Summary of Key Findings  
2007-2011**

**MEAS**



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## Table of Contents

Background & Research Methodology.....	1.
Executive Summary .....	2.
Main Findings:	
1. TV Campaign – Awareness and Attitudes.....	4.
1.1 Campaign Evaluation .....	5.
2. Attitudes to Public Drunkenness .....	6.
3. Awareness of drinkaware.ie .....	7.
3.1 Brand awareness drinkaware.ie summary .....	7.
3.2 Brand Awareness drinkaware.ie.....	8.
3.3 Prompted Awareness .....	9.
3.4 Activities of drinkaware.ie.....	10
4. Tactical Campaigns.....	11.
4.1 Standard drink - awareness .....	11.
4.2 Length of time to process alcohol.....	12.
4.3 ‘Morning After’ campaign.....	13.
5. Drinking Behaviour .....	14.
5.1 Drinking Frequency .....	14.
5.2 Drinking Volume.....	15.
6 Conclusions and Next Steps .....	16.



## Background & Research Methodology

Millward Brown Lansdowne have conducted annual research on behalf of MEAS each year since 2007.

The overall MEAS communications strategy is to:

**‘erode social permission for excessive public drunkenness by amplifying the impact on the sober innocent, tactical initiatives are undertaken to promote a more responsible approach to drinking’**

This summary report highlights the key findings and trends behind the progress made in achieving the aims of the communication strategy.

All advertising and communications are subject to measurement and evaluation through research which tracks:

- Changes in drinking attitudes and behaviours over time
- Campaign effectiveness
- Creditability of message source

Each year the survey has included all or some of the following measures:

- Advertising recall and awareness
- Impact of advertising
- Attitudes towards drinking behaviours
- Assessment of drinkaware.ie
- Attitudes to drinkaware.ie and its campaigns
- Awareness of a standard drink
- Length of time to get rid of one standard drink
- Awareness of and attitudes towards tactical campaigns e.g. ‘Morning After’ and ‘Survival Guides’
- Drinking behaviour and frequency

The methodology used was the Millward Brown Lansdowne Omnibus survey – Consisting of 1000 face-to-face interviews conducted with a Nationally Representative sample of Irish adults aged 18+. The Omnibus sample was boosted to include additional interviews among 18-29 year olds, the group of key interest to MEAS (391 interviews carried out among this group). Data was re-weighted to national proportions at the analysis stage. The margin of error for this survey is estimated at +/-3% at 50% with a 95% confidence level.

\* \* \* \* \*



## Executive Summary

- The current CCTV campaign has recorded very high levels of awareness (82%), and is the best recalled of any of the adverts used since 2007. The campaign continues to communicate the impact of public drunkenness on others and the unacceptability of such behaviour at well above communication target levels.
- Intolerance of public drunkenness is strong. Key increases this year are recorded in 'unattractive to opposite sex' (91% agree), 'it is only young people who drink excessively and get out of control' (74% disagree) and those who disagree that 'we all drink to excess, it's no big deal' (48% disagree). These indicators are at, or well ahead of the communications target of 50% and suggest that the key campaign objective of: **'To erode social permission for excessive public drunkenness by amplifying the impact on the sober innocent'** are really impacting on people's attitudes to drinking.
- Awareness of any MEAS campaign has reached a high point of 84% rising to 90% amongst the under 30's. The vast majority of this awareness is driven by drinkaware.ie TV advertising and co-branding partners.
- Approval of drinkaware.ie's remit is widespread. Indeed there is effectively no opposition to advertising about alcohol moderation; this should be seen as an opportunity to tackle the drinking culture in new and effective ways.
- *Correct* awareness of a standard drink has now met its communications target of over 6 in 10 adults, and the awareness increase for under 25's is also evident. This is clear evidence of the strong tactical performance of the campaign in delivering this crucial message.
- A further sign that the message on drinking behaviour is getting across is the uplift in those correctly stating that it takes an hour for the body to get rid of one drink – which is now at 34%. Clearly there is further scope to improve awareness of this measure.
- The message about the 'Morning After' is also continuing to take hold. The vast majority *disagree* with fitness to drive at 8am following drinking till midnight; neither do people believe that alcohol will cure them of a hangover.
- However there is some belief that it is possible to 'sober up' if necessary – the dangers of such attempts need to be pointed out.



- While organising transport is now an accepted part of our social culture, other drinking strategies from the 'Survival Guides' such as setting a budget, pacing the night with soft drinks, or planning on the number of drinks in advance are the preserve of a minority and will require further work. .
- The under 30's are particularly unlikely to plan their night out in such a manner – with fewer than one in three doing so. These survival strategies indicate where future messages may be targeted to good effect.
- Alcohol consumption in terms of overall incidence remains at about 80%. It seems that although people are drinking less frequently than before, the number of drinks consumed 'per drinking occasion' has not changed . The core target market (18 – 24) reports that they are drinking less frequently and on fewer occasions in the past week. The data also suggests that they are drinking more standard drinks per occasion.



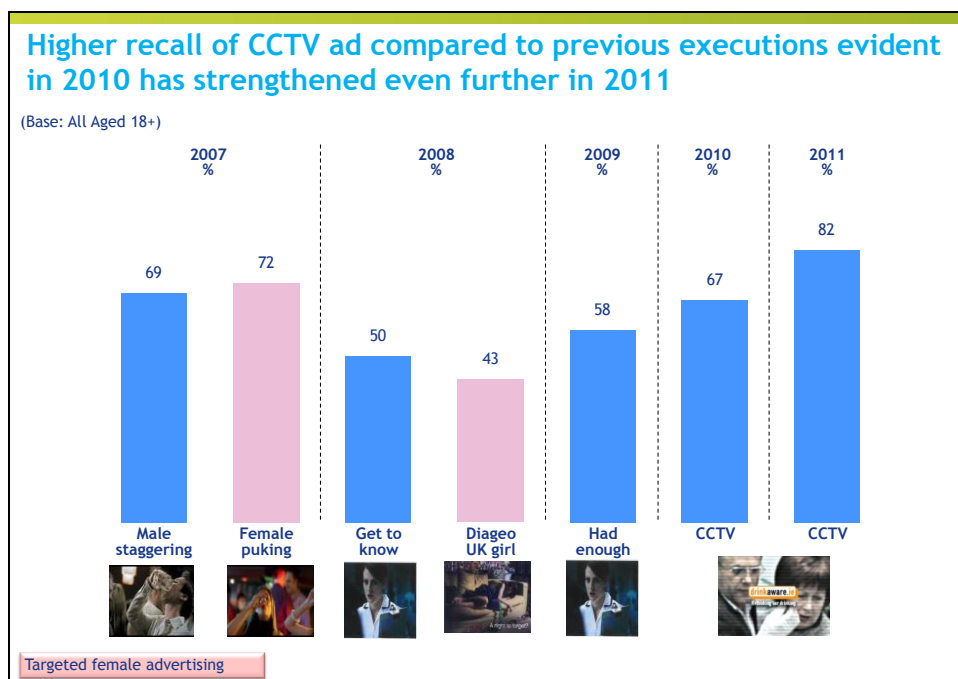
## 1. TV Campaign 'CCTV' – Awareness and Attitudes

### 1.1 Campaign Recall

The CCTV campaign has reached an extremely high level of reach, with more than 8 in 10 Irish adults now recalling the ad. This is some 20 percentage points higher than advertising industry norms for a similar level of advertising exposure.

Almost 9 in 10 of the key target 18-24 year olds are aware of the campaign. The overall results compare very favourably with 2010 where recall was at 2 in 3 people – which was an impressive result in its own right.

Looking further back, it is evident that CCTV has the highest level of recall of any campaign measured since 2007.



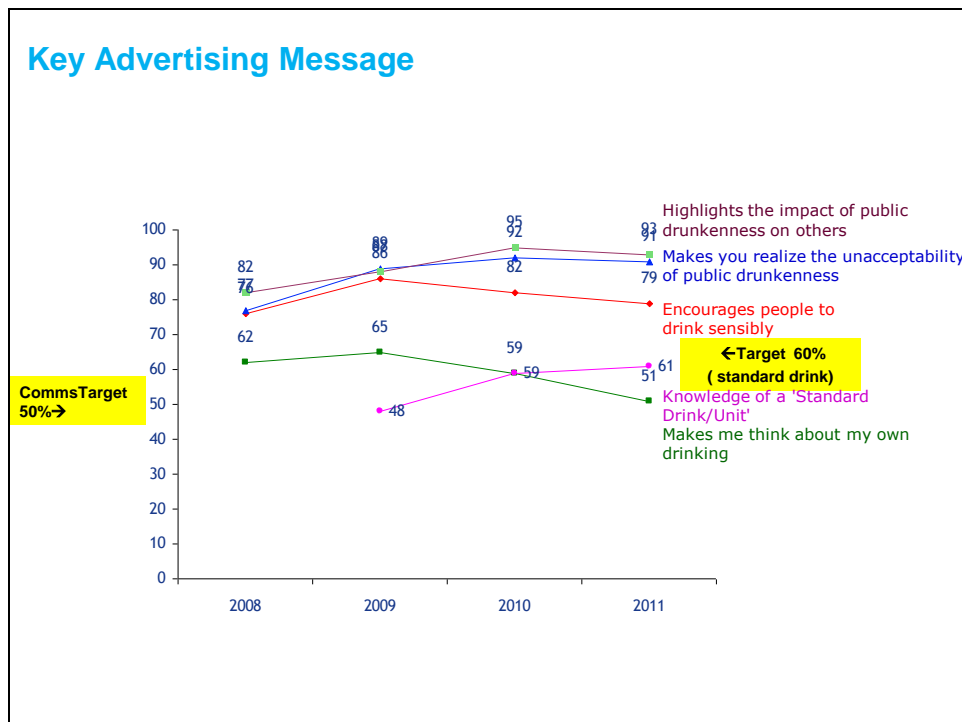


## 1.2 Campaign Evaluation

CCTV continues to effectively deliver the core strategic objectives of the campaign which is:

***'To erode social permission for excessive public drunkenness by amplifying the impact on the sober innocent'***

Viewed over time, all of the campaigns have been largely successful in 'highlighting the impact of public drunkenness on others' and the 'unacceptability' of this behaviour. There is little dissent from this view and the campaign has easily exceeded its communication targets. However a refreshed campaign is probably required to maintain these impact levels as the growth rate for the key measures is flattening – albeit at a high level.

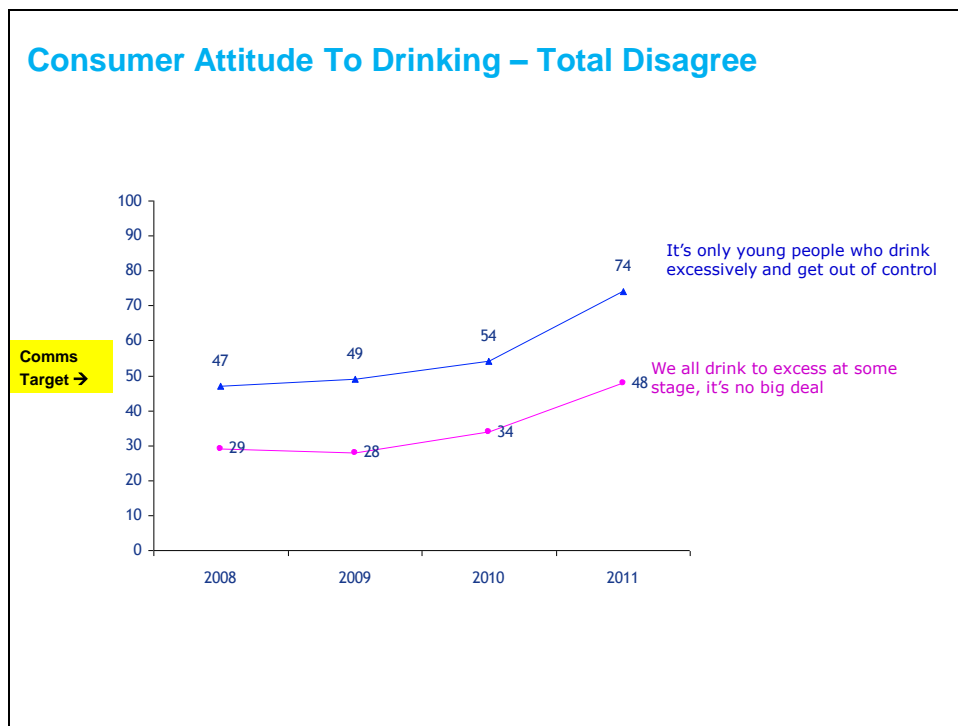




## 2. Attitudes to Public Drunkenness

There is some very positive evidence that attitudes are hardening against drunkenness generally. Most notable in 2011 is the jump for *'being drunk in public is very unattractive to the opposite sex'* – 50% now agree strongly.

The other attitudinal metrics also paint an encouraging picture. There is a strong increase in people disagreeing that *'it is only young people who drink excessively and get out of control'* – which is now at over 70% total disagreement.



Acceptance of excessive drinking as something we all do, 'it's no big deal' is also declining as a cultural norm. The communications target of 50% disagreeing with this statement has now almost been reached – 48% disagree.



### 3. Awareness of drinkaware.ie

#### 3.1 Brand awareness – drinkaware.ie - Summary

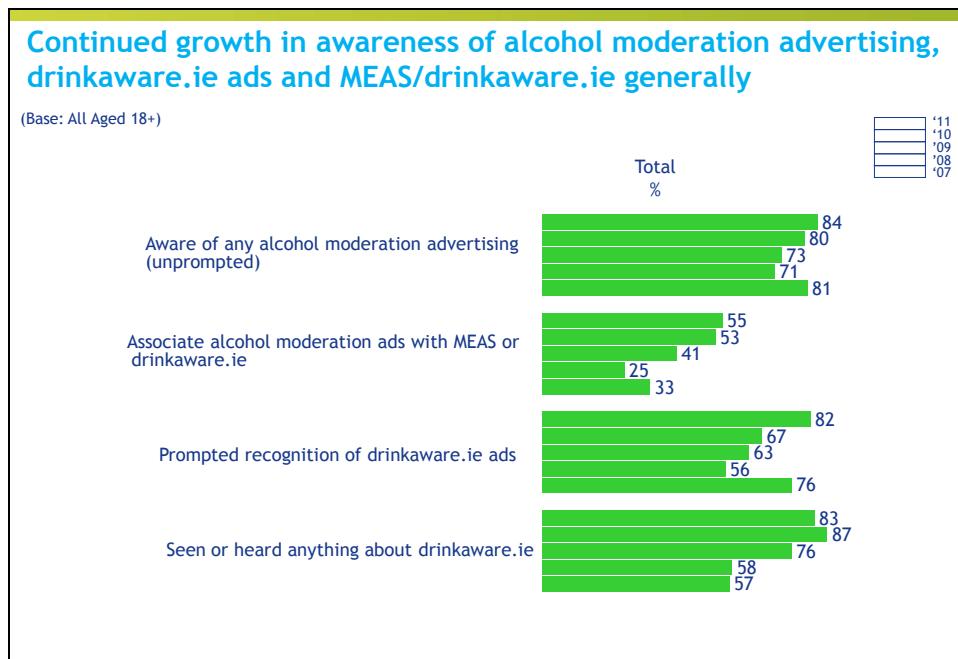
Brand and Advertising awareness have recorded their highest levels of recall in the series – building on an already high base.

Unprompted awareness of alcohol moderation advertising is at its highest level to date (84%).

Association with MEAS or drinkaware.ie has maintained the strong uplift first recorded in 2010 and is now at (55%).

Prompted recognition of the drinkaware.ie ads has also recorded a strong increase – up 15 points to 82%.

The strongest increases for unprompted awareness in 2011 are amongst men and under 30's – where at 9 in 10 recall, it has reached near universal reach.



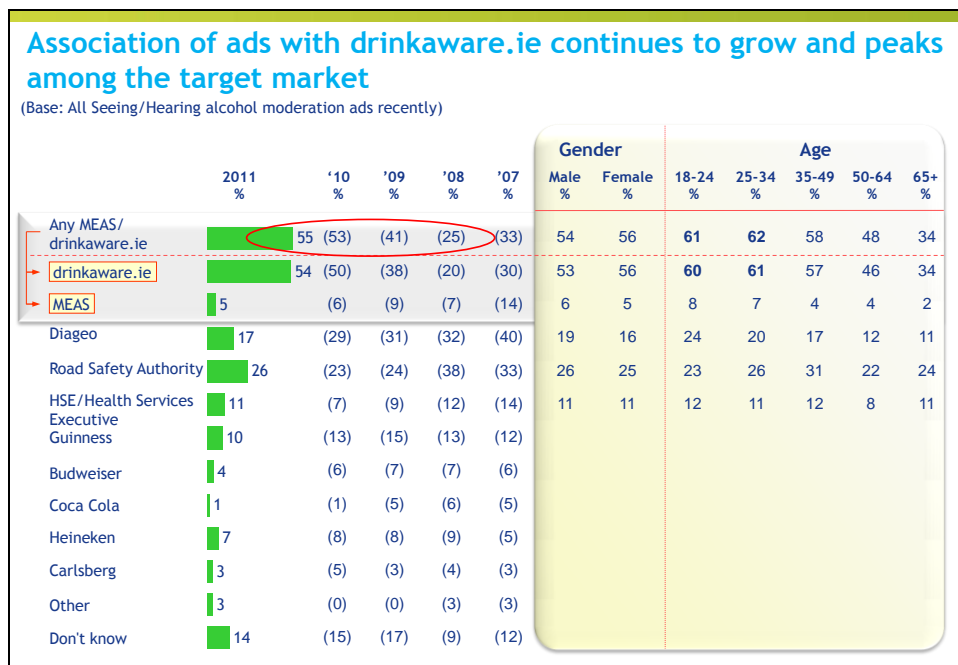


### 3.2 Brand awareness – drinkaware.ie

More than 9 in 10 people say TV is where they heard of drinkaware.ie – this is the highest level yet recorded and continues to strongly outperform the sector norms for alcohol advertising.

drinkaware.ie is the primary driver of this brand awareness – and is mentioned spontaneously by six in 10 under 25's.

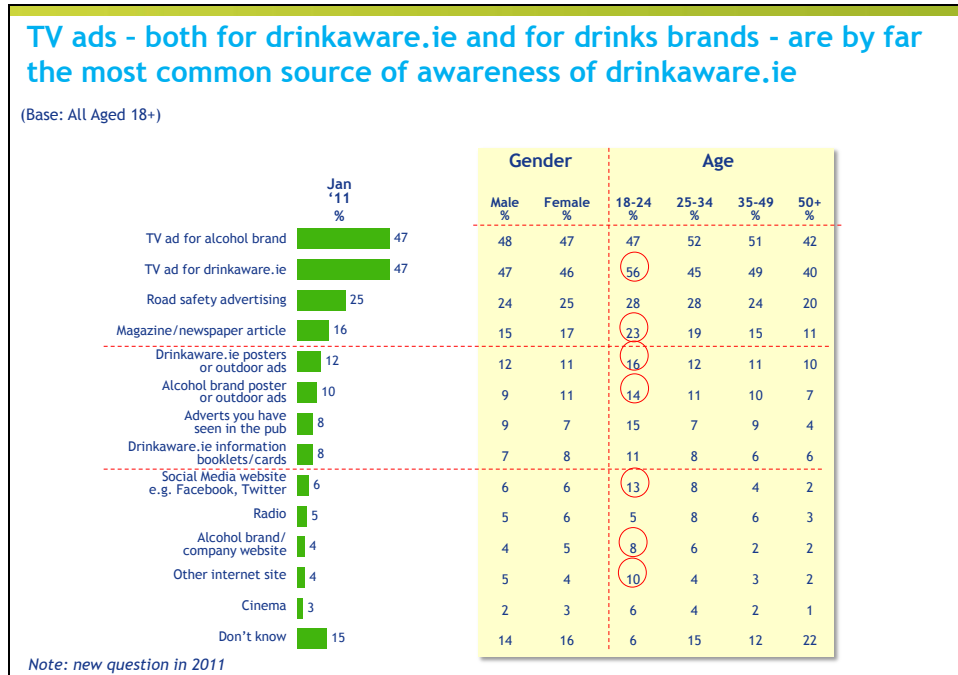
Partner co-branding is also an important link for people when recalling alcohol moderation advertising – with Diageo and the RSA the most important of these.





### 3.3 Prompted Awareness

Those who recall the name drinkaware.ie are equally likely to mention the TV ad or a TV ad for an alcohol brand. TV ad awareness is highest amongst the under 25 target group at 56%.

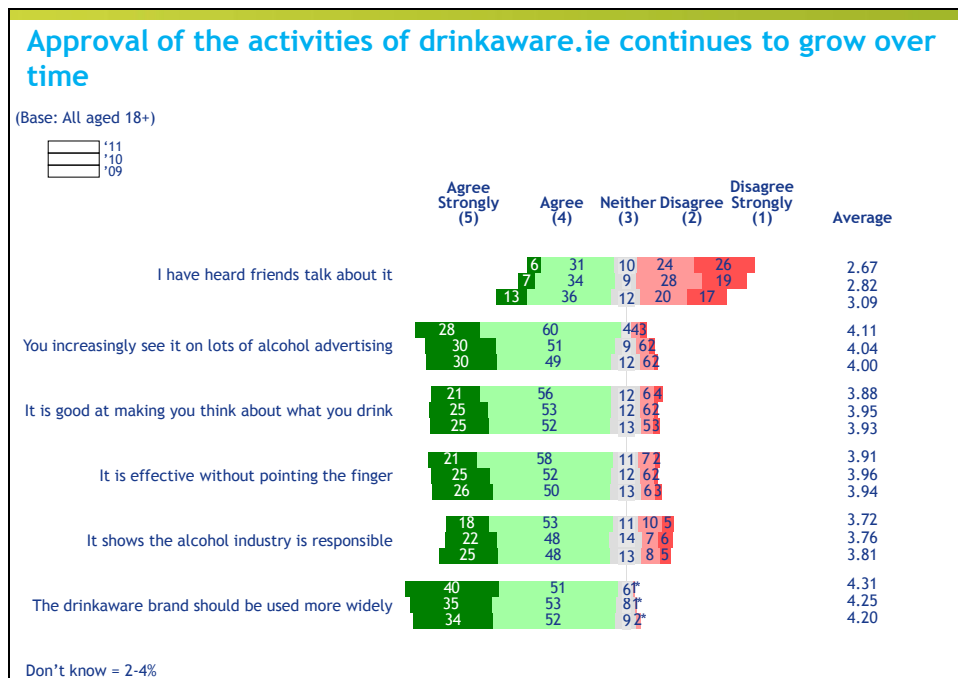




### 3.4 Activities of drinkaware.ie

Attitudes towards drinkaware.ie are almost wholly positive. There is near universal agreement that it should be used more widely and that it is increasingly seen on alcohol advertising. Three in four also agree drinkaware.ie is good at *'making you think about what you drink'*.

The vast majority of people think it is a good idea for an organisation like MEAS to advertise about responsible drinking.



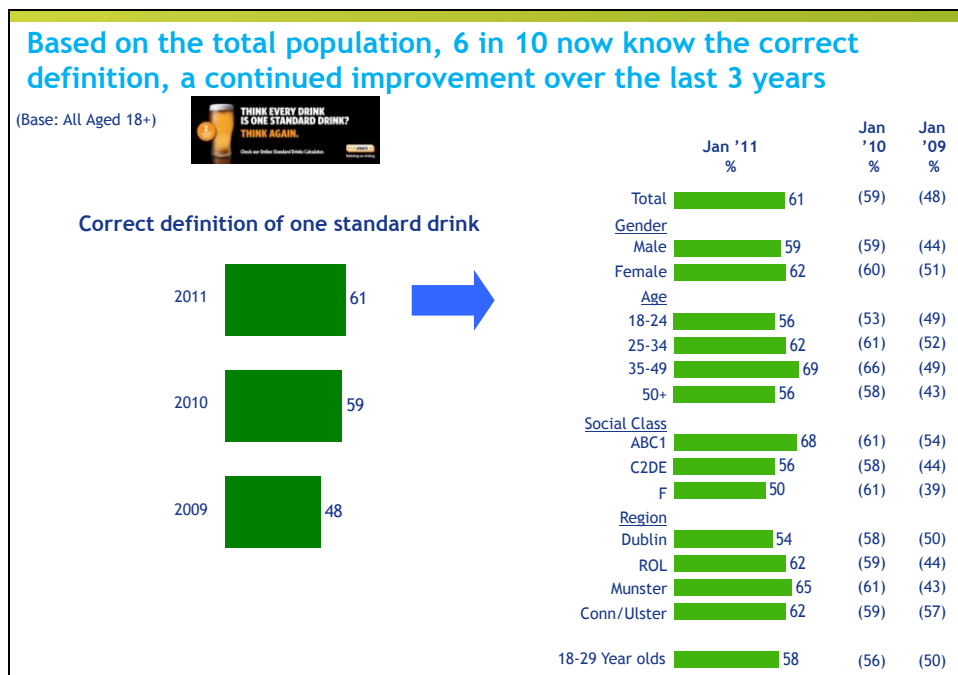


## 4. Tactical campaigns

### 4.1 Standard Drink 'Correct' awareness

Correct awareness of the definition of one standard drink also continues to improve, meeting its target of 6 in 10 people correctly defining a standard unit and highlighting the success of getting the tactical message across.

The most mentioned 'standard alcoholic drink' is now a 'small glass of wine', which has climbed 9 points in 2011 to 29%; next comes a half pint of beer at 24% - down 8 points from its 2010 high point. Only 11% mention a spirit measure – largely unchanged over three years.

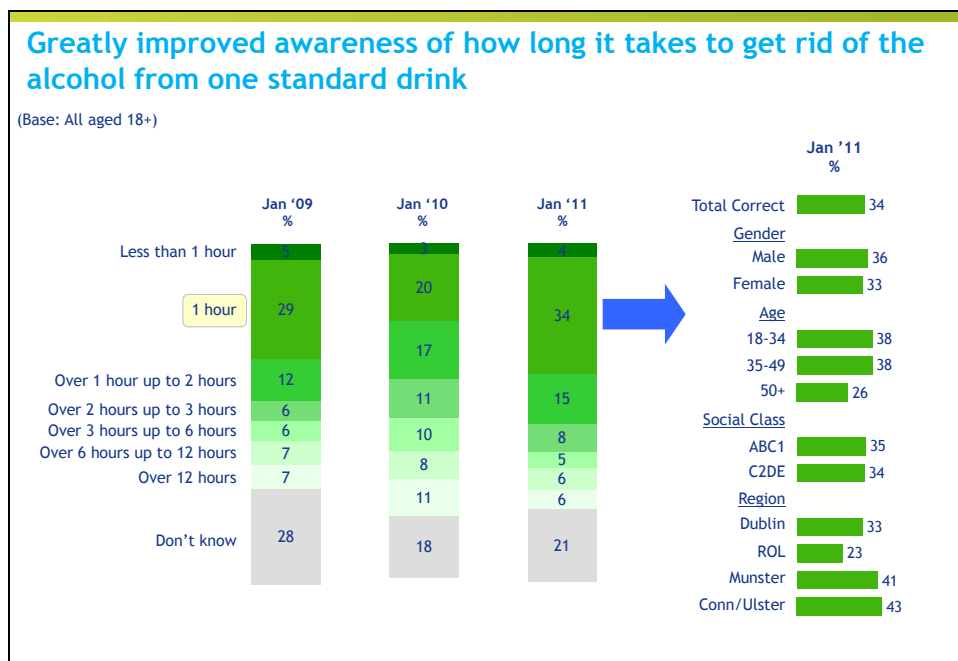




#### 4.2 Length of time it takes to get rid of the alcohol from one standard drink

A further encouraging sign is the uplift in awareness of the length of time it takes to get rid of the alcohol from one standard drink.

Thirty four percent of people now correctly say 'one hour', compared to 20% in 2010. Younger people are actually more likely to get this right, which is further evidence that this key element of the message is gaining purchase.

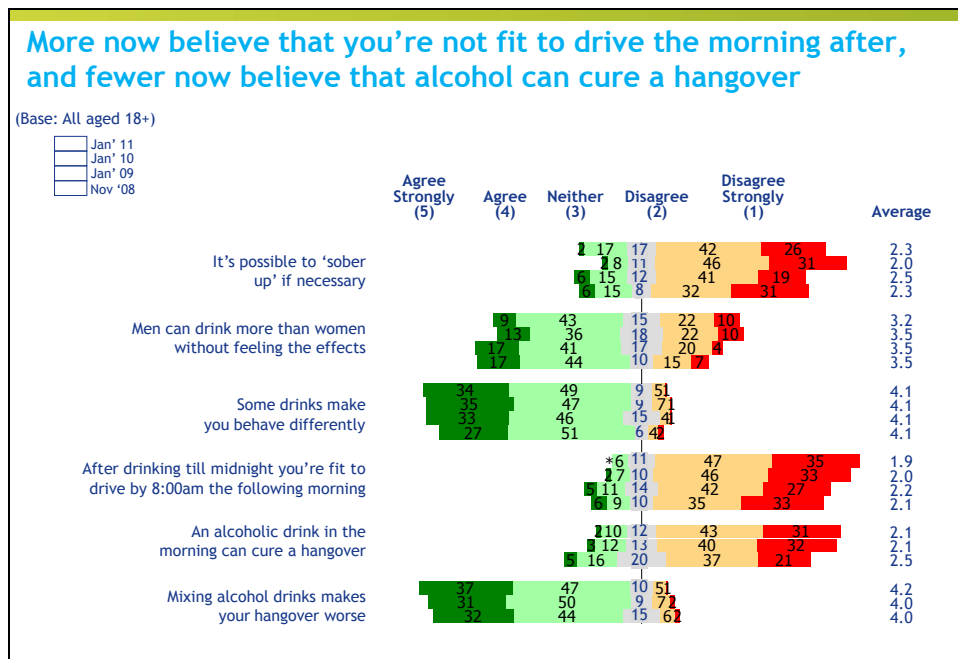




### 4.3 The 'Morning After' Campaign

The message about the morning after is also getting through: more than 8 in 10 now disagree that 'after drinking till midnight you're fit to drive by 8am the following morning'.

The 'hair of the dog' solution is also dismissed by the vast majority.

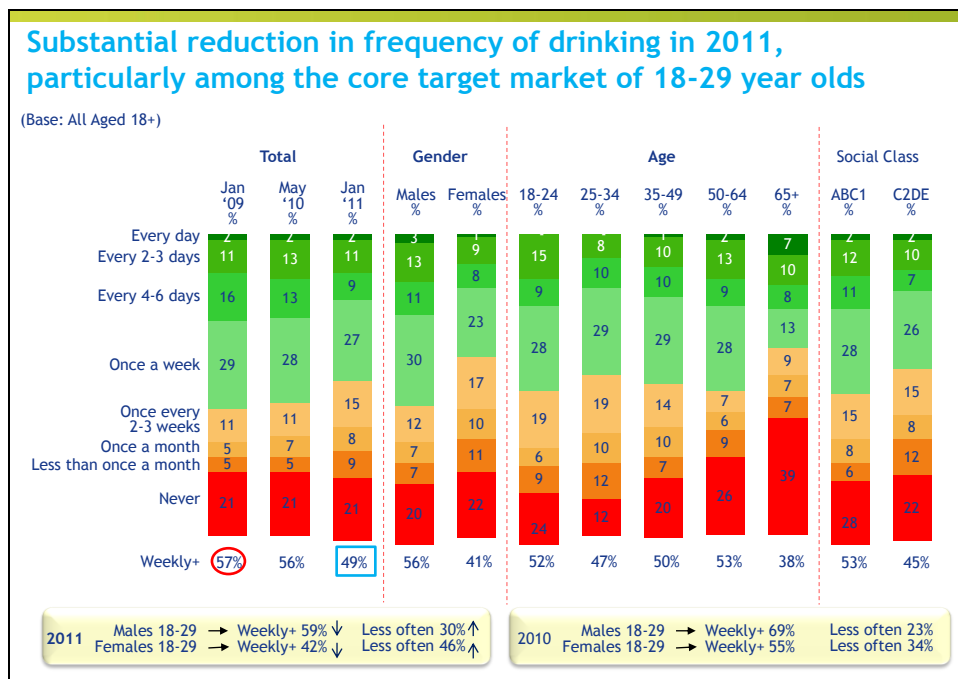




## 5. Drinking Behaviour

### 5.1 Drinking Frequency

The frequency of drinking in Ireland is in decline, weekly+ alcohol consumption has dropped from 57% in 2009 to 49% in 2011. This trend is reflected in the behaviour of the key target groups, males under 30 have fallen 10 points to 59% in a year, with women under 30 falling 13 points to 42%.

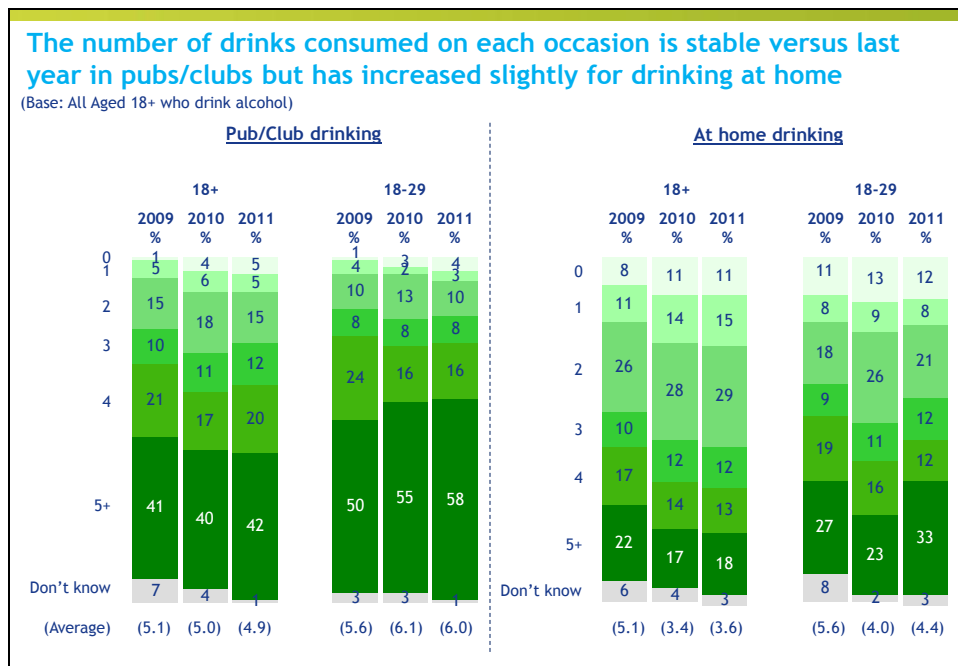




## 5.2 Drinking volumes

Drinking volumes reflect the national trend away from pubs towards at-home drinking, pub/club drinking is slightly down and at-home slightly up, at a total level.

However the core target market is not reducing the quantity that they drink per occasion.





## 6. Conclusions and Next Steps

- The CCTV campaign has continued to achieve record high levels of recall and campaign evaluation and the message of eroding acceptability of public drunkenness has been maintained well above communications target levels. Fresh creative may now be required to maintain this momentum in advertising salience.
- Awareness of drinkaware.ie is also at its highest level at 82%, most recall is driven from TV – either by its own advertising or partner co-branding. This indicates that the co-branding approach is proving effective for the campaign overall.
- Moreover, overall attitudes against public drunkenness continue to harden on the key measures, all of which suggest real progress is being made at a strategic level in shifting cultural norms in relation to drinking behaviour and public drunkenness.
- At a tactical level the message of what constitutes one standard drink has now achieved its communications target and further increases in awareness should now be in reach.
- In a similar vein awareness of the length of time it takes to process one standard drink has risen (to one in three saying one hour), this message still needs to be re-enforced so as people are self-aware of the effect of their drinking.
- The *Morning After* campaign has made further progress also – one issue where people need more education is a potential tendency to believe it is possible to ‘sober up’ if required – the dangers of this should be made clear. It is encouraging that the message about driving the morning after is taking hold.