



Foundation for Alcohol Research & Education

ALCOHOL INDUSTRY ADVERTISING PARTNERSHIPS WITH AFL AND NRL TEAMS 2019

APRIL 2019

About FARE

The Foundation for Alcohol Research and Education (FARE) is an independent, not-for-profit organisation working to stop the harm caused by alcohol. Alcohol harm in Australia is significant. Nearly 6,000 lives are lost every year and more than 144,000 people are hospitalised making alcohol one of our nation's greatest preventative health challenges.

As a leading advocate of evidence-based research, FARE contributes to policies and programs that support the public good, while holding the alcohol industry to account. FARE works with leading researchers, communities, governments, health professionals and frontline service providers to bring about change and reduce alcohol harm.

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Executive summary

Most Aussies love sport: watching an athlete or team use astute decision-making, technical skill and physical prowess to compete to the best of their ability. Alcohol is fundamentally incompatible with these attributes, and yet alcohol marketing saturates Australian sport.

The women and men at the top of their sport are revered for their talent, and children all over the country try to emulate their heroes. Therefore, it is highly problematic when these role models are compelled by commercial deals to promote alcohol, normalising an addictive, psychoactive drug that causes cancer and contributes to the three leading causes of death for adolescents – unintentional injuries, homicide and suicide.¹

This study sought to explore the prevalence of alcohol companies' advertising partnerships with men's and women's Australian Football League (AFL/AFLW) and National Rugby League (NRL/NRLW) teams, by reviewing their official websites, merchandise and social media channels. A scoring system was developed to rank teams according to the extent of their current alcohol partnerships (three points for alcohol-branded playing kit, two for merchandise or a major alcohol industry partner, and one for other forms of advertising deals). Unfortunately, it was discovered that there was insufficient data to rank the women's teams, so the results pertain solely to the men's competition. Data on AFLW and NRLW teams are provided where possible.

This study finds that alcohol advertising deals are widespread in the AFL and NRL men's competitions. The promotion of alcohol brands is spread across a number of channels, including merchandise, training and playing kit. However, alcohol advertising across the codes is not ubiquitous, with one team in each league having no commercial partnerships with alcohol companies, while a number of others have no major alcohol industry partners. This indicates that alcohol advertising deals are not a pre-requisite for success or popularity of AFL and NRL teams.

Key findings

1. Almost every AFL and NRL men's team has an advertising deal with an alcohol brand

This analysis finds that 15 of the 16 men's NRL clubs, and 17 of 18 men's AFL clubs accept money from the alcohol industry in return for promoting alcohol brands.

In the AFL, six clubs have at least one major advertising deal with an alcohol company, a further 11 have at least one minor advertising deal, and only one team, the Western Bulldogs, do not appear to accept any money from the alcohol industry. The worst offender, the Geelong Cats, had three major and one minor alcohol advertising deals. There were no alcohol-branded playing kits.

In the NRL, six clubs have at least one major advertising deal with an alcohol company, a further nine have at least one minor advertising deal, and only one team, Melbourne Storm, was identified as not accepting any money from the alcohol industry. Three teams (Brisbane Broncos, New Zealand Warriors and North Queensland Cowboys) have alcohol-branded playing kit, training kit or merchandise.

2. A small group of foreign-owned multinationals are responsible for the majority of alcohol advertising deals in the AFL, AFLW and NRL

A small group of some of the world's largest foreign-owned alcohol companies are responsible for the majority of alcohol advertising deals in the AFL, AFLW and NRL. Across these leagues, four companies are responsible for the majority (60 per cent) of the instances of commercial partnerships between alcohol brands and clubs.

Carlton & United Breweries appear to have the most advertising deals with both AFL and NRL teams combined. The brands they promote are different for each league: Carlton Draught for AFL, and Victoria Bitter (VB) for NRL.

Each league also has four corporate partnerships with alcohol industry organisations, three of which (Carlton & United Breweries, Treasury Wine Estates and DrinkWise) are shared by both leagues.

3. Alcohol advertising deals in the AFL and NRL occur through a number of channels

This analysis finds that alcohol advertising deals manifest in different ways. There are multiple opportunities for an alcohol company to integrate itself with AFL and NRL. These include:

- partnering with the league itself
- partnering with individual teams (often in a hierarchy reflecting the value of the deal, e.g. 'premier partner', 'major partner', 'platinum partner', 'premier partner' and 'associate partner')
- branding the playing jerseys, training kit or merchandise of individual teams or the league
- becoming an official supplier of alcohol to a club e.g. Carlton and United Breweries as the official 'Beer Partner' of the Parramatta Eels.

Introduction

Alcohol is one of the most heavily promoted products in the world. It is also one of the most deadly.² In 2010, a review of key strategies to address the health and social damages caused by alcoholic beverages noted the need to tackle all forms of alcohol advertising.³

For decades the alcohol industry has used sport to reach large audiences of all ages with its advertising. This is made possible in Australia due to an exemption in the *Commercial Television Industry Code of Practice* that allows alcohol advertising during children's viewing hours if it is an accompaniment to a live sport broadcast or sport program. The exemption is heavily exploited by the alcohol industry, with 49.5 per cent of all alcohol advertising shown during the broadcast of live sporting events.⁴ Alcohol companies have also been identified as linking their social media strategies to sport, to engage with consumers and build a connection between alcohol and the experience of being a sporting spectator.⁵

An analysis of alcohol advertisements during Australia's major televised sports found the majority occurred during AFL and NRL programs.⁶ The extent of alcohol sponsorship and advertising during the 2018 AFL and NRL grand finals was quantified in a recent study. This analysis found almost one occurrence of alcohol marketing per minute in the AFL game, and over three per minute in the NRL game, both broadcast during children's viewing hours. This study demonstrated that professional sport is currently being used as a highly effective conduit for mass population alcohol marketing during children's viewing hours.⁷

This is concerning because young people's exposure to alcohol marketing increases their alcohol consumption and increases their likelihood to start drinking earlier.^{8,9,10,11} In addition to children and young people associating sport with alcohol^{12,13}, research has identified that alcohol marketing in sport is linked to increased alcohol consumption¹⁴, including among school children¹⁵ and those who are playing the sport.¹⁶

Children should be prevented from consuming alcohol because alcohol can damage the developing brain¹⁷, is a group 1 carcinogen, and a psychoactive, addictive drug that contributes to the three leading causes of death among adolescents – unintentional injuries, homicide and suicide.¹⁸



Methodology

This study explored the extent to which alcohol companies hold advertising deals with men's and women's AFL and NRL teams. A scoring system was developed to rank teams according to the extent of their current commercial deals with the alcohol industry.

The following aspects were taken to constitute alcohol advertising deals:

- commercial partnerships with alcohol industry organisations listed on the club's official website, on-kit advertising and merchandise; and
- commercial partnerships with alcohol industry organisations publicised on official club social media channels (Facebook, Twitter, LinkedIn and Instagram).

By contrast, the following examples of alcohol advertising partnerships were excluded:

- TV advertising during games;
- in-stadium advertising (as many stadiums are shared, few clubs have sole responsibility for the advertising that occurs where they play);
- pre-game banners;
- sport-orientated social media posts made by alcoholic beverage companies;
- retailers (e.g. supermarkets), casinos or pubs/hotels, due to their brands not being explicitly or exclusively about alcohol, despite these companies and/or their parent companies owning and/or profiting from liquor services.

Due to these exclusions, this analysis is likely to be a conservative estimate of the extent of alcohol-related advertising partnerships in AFL and NRL.

This analysis follows an approach consistent with previous studies to identify corporate partnerships between the AFL¹⁹ and other sports in Australia and New Zealand^{20,21} and food and alcohol companies. The main difference between this analysis and other published studies is the inclusion of liquor suppliers in this analysis in instances when they are presented on the club's website alongside other commercial partners. For example, if a beer or wine brand was presented as an 'official supplier' within the corporate partnerships section on a club's website, this brand was included because this is a form of corporate partnership.

Most AFL and NRL teams structure their partners in a tiered system, from a 'premier' partner to a broader list of suppliers and contributors. A scoring system was developed based on the types of alcohol advertising likely to yield most exposure for the brand or company (see below). For example, research has identified jersey sponsorship as a particularly pervasive form of alcohol advertising to young children.²²

- Three points for alcohol-branded playing kit.
- Two points for a 'major' alcohol partner (in the top three tiers of a club's partnership system), or alcohol-branded club merchandise.
- One point for other examples of alcohol partnerships.

Data analysis was conducted between 11-28 February 2019, from publicly available data accessed through the Clubs' websites, exploring:

- overall alcohol partnerships for each club
- the prevalence of individual alcohol companies or brands across all clubs, including commercial partnerships with the league itself.

Results





1. Almost every AFL and NRL men's team has an advertising deal with an alcohol brand

This analysis found that 17 of 18 AFL and 15 of 16 NRL teams has an advertising deal with an alcohol company. The results for each league are presented below.

In the AFL, six clubs have at least one major advertising deal with an alcohol company, a further 11 have at least one minor advertising deal, and only one team, the Western Bulldogs, do not appear to accept any money from the alcohol industry. The worst offender, the Geelong Cats, had three major and one minor alcohol advertising deals. There were no alcohol-branded playing kits.










TABLE 1: MEN'S AFL CLUBS RANKED BY EXTENT OF ALCOHOL ADVERTISING DEALS (FILTERED BY TOTAL PARTNERSHIP POINTS IN DESCENDING ORDER)

RANK	TEAM	PARTNERSHIP POINTS		
		MAJOR	OTHER	TOTAL
1	 GEELONG CATS	6	1	7
2	 WEST COAST EAGLES	4	0	4
2	 MELBOURNE DEMONS	4	0	4
4	 PORT ADELAIDE	2	2	4
5	 GOLD COAST SUNS	0	4	4
6	 BRISBANE LIONS	2	1	3
7	 CARLTON	0	3	3
8	 FREMANTLE	2	0	2
9	 HAWTHORN HAWKS	0	2	2
10	 SYDNEY SWANS	0	1	1
10	 ST KILDA SAINTS	0	1	1
10	 RICHMOND TIGERS	0	1	1
10	 NORTH MELBOURNE	0	1	1
10	 GWS GIANTS	0	1	1
10	 ESSENDON	0	1	1
10	 COLLINGWOOD	0	1	1
10	 ADELAIDE CROWS	0	1	1
18	 WESTERN BULLDOGS	0	0	0

Carlton & United Breweries appear to be the most prevalent alcohol company, holding corporate partnerships with almost every team in the league. Three alcohol companies (Carlton & United Breweries, Coca-Cola Amatil and Treasury Wine Estates) were also identified as holding corporate partnerships with the AFL league itself (promoting Carlton Draught, Jim Beam and Wolf Blass respectively), alongside the alcohol industry organisation DrinkWise.




TABLE 2: ALCOHOL INDUSTRY ORGANISATIONS RANKED BY EXTENT OF ALCOHOL ADVERTISING DEALS WITH AFL CLUBS AND THE LEAGUE (FILTERED BY TOTAL PARTNERSHIP POINTS IN DESCENDING ORDER)

				PARTNERSHIP POINTS		
RANK		COMPANY	INSTANCES OF ADVERTISING DEALS	MAJOR	OTHER	TOTAL
1		CARLTON & UNITED BREWERIES	12	10	7	17
2		TREASURY WINE ESTATES	5	2	4	6
3		COCA-COLA AMATIL	4	2	3	5
4		DIAGEO AUSTRALIA	3	2	2	4
5		DRINKWISE	1	2	0	2
5		LION	1	2	0	2
5		THIRSTY CAMEL BOTTLE SHOPS	1	2	0	2
5		JACK RABBIT BELLARINE PENINSULA	1	2	0	2
5		WEST CAPE WINES	1	2	0	2
		OTHERS	7	0	7	7

In the NRL, six clubs have at least one major advertising deal with an alcohol company, a further nine have at least one minor advertising deal, and only one team, Melbourne Storm, was identified as not accepting any money from the alcohol industry. Three teams (North Queensland Cowboys, New Zealand Warriors and Brisbane Broncos) have alcohol-branded playing kit, training kit or merchandise.











TABLE 3: MEN'S NRL CLUBS RANKED BY EXTENT OF ALCOHOL ADVERTISING DEALS (FILTERED BY TOTAL PARTNERSHIP POINTS IN DESCENDING ORDER)

RANK	TEAM	PARTNERSHIP POINTS				
		MAJOR	OTHER	PLAYING KIT	MERCHANDISE / TRAINING KIT	TOTAL
1	 NORTH QUEENSLAND COWBOYS	4	1	12	4	21
2	 NEW ZEALAND WARRIORS	0	1	15	2	18
3	 BRISBANE BRONCOS	2	2	0	4	8
4	 CANBERRA RAIDERS	2	2	0	0	4
5	 WESTS TIGERS	2	1	0	0	3
6	 PENRITH PANTHERS	0	3	0	0	3
7	 PARRAMATTA EELS	2	0	0	0	2
7	 CRONULLA-SUTHERLAND SHARKS	2	0	0	0	2
9	 SYDNEY ROOSTERS	0	1	0	0	1
9	 ST. GEORGE ILLAWARRA DRAGONS	0	1	0	0	1
9	 SOUTH SYDNEY RABBITOHS	0	1	0	0	1
9	 NEWCASTLE KNIGHTS	0	1	0	0	1
9	 MANLY WARRINGAH SEA EAGLES	0	1	0	0	1
9	 GOLD COAST TITANS	0	1	0	0	1
9	 CANTERBURY-BANKSTOWN BULLDOGS	0	1	0	0	1
16	 MELBOURNE STORM	0	0	0	0	0

Carlton & United Breweries have advertising deals with the majority of NRL teams. Three alcohol companies have alcohol-branded playing and/or training kit. Three of the four alcohol industry organisations (Carlton & United Breweries, DrinkWise and Treasury Wine Estates) who hold corporate partnerships with the AFL league also hold them with the NRL, in addition to Diageo Australia. Interestingly, these arrangements promoted slightly different products (Victoria Bitter, Wolf Blass and Bundaberg Rum respectively) to their AFL equivalents.

TABLE 4: ALCOHOL INDUSTRY ORGANISATIONS RANKED BY EXTENT OF ALCOHOL ADVERTISING DEALS WITH NRL CLUBS AND THE LEAGUE (FILTERED BY TOTAL PARTNERSHIP POINTS IN DESCENDING ORDER)

RANK		COMPANY	INSTANCES OF ADVERTISING DEALS	PARTNERSHIP POINTS				TOTAL
				MAJOR	OTHER	PLAYING KIT	MERCHANDISE / TRAINING KIT	
1		ASAHI HOLDINGS (AUSTRALIA)	7	2	0	15	2	19
2		DIAGEO AUSTRALIA	6	4	0	12	0	16
3		LION	9	4	3	0	8	15
4		CARLTON & UNITED BREWERIES	7	12	1	0	0	13
5		COCA-COLA AMATIL	3	0	3	0	0	3
5		TREASURY WINE ESTATES	2	2	1	0	0	3
7		DRINKWISE	1	2	0	0	0	2
7		SIRROMET WINES	2	0	2	0	0	2
		OTHERS	5	0	5	0	0	5













2. A small number of foreign-owned multinationals are responsible for the majority of alcohol advertising deals across the AFL, AFLW and NRL

A small group of some of the world's largest alcohol companies are responsible for the majority of alcohol advertising deals in the AFL, AFLW and NRL. Just four companies are responsible for the majority (60 per cent) of the instances of commercial partnerships between alcohol brands and clubs (43 of 72 total).

All of these four companies are owned by foreign interests: Carlton and United Breweries (also known as ABI Australia Holding Pty Ltd) is owned by Anheuser-Busch InBev (Belgium); Diageo Australia Ltd is owned by Diageo plc (UK); Asahi Holdings (Australia) Pty Ltd is owned by Asahi Group Holdings Ltd (Japan); and Lion Pty Ltd is owned by Kirin Holdings Company Ltd (Japan).²³

Carlton & United Breweries appear to have the most advertising deals with both AFL and NRL teams combined. The brands they promote are different for each league: Carlton Draught for AFL, and Victoria Bitter (VB) for NRL.

TABLE 5: ALCOHOL INDUSTRY ORGANISATIONS RANKED BY EXTENT OF ALCOHOL ADVERTISING DEALS WITH AFL, AFLW AND NRL CLUBS AND LEAGUES (FILTERED BY TOTAL PARTNERSHIP POINTS IN DESCENDING ORDER)

RANK		COMPANY	INSTANCES OF ADVERTISING DEALS	PARTNERSHIP POINTS				TOTAL
				MAJOR	OTHER	PLAYING KIT	MERCHANDISE / TRAINING KIT	
1		CARLTON & UNITED BREWERIES	19	22	8	0	0	30
2		DIAGEO AUSTRALIA	9	6	2	12	0	20
3		ASAHI HOLDINGS (AUSTRALIA)	7	2	0	15	2	19
4		LION	10	6	3	0	8	17
5		TREASURY WINE ESTATES	7	4	5	0	0	9
6		COCA-COLA AMATIL	7	2	6	0	0	8
7		DRINKWISE	2	4	0	0	0	4
8		THIRSTY CAMEL BOTTLE SHOPS	1	2	0	0	0	2
8		JACK RABBIT BELLARINE PENINSULA	1	2	0	0	0	2
8		WEST CAPE WINES	1	2	0	0	0	2
11		SIRROMET WINES	2	0	2	0	0	2
		OTHERS	5	0	5	0	0	5

3. Alcohol advertising deals in the AFL and NRL occur through a number of channels

This analysis finds that alcohol advertising deals manifest in different ways. There are multiple opportunities for an alcohol company to integrate itself with AFL and NRL, each offering its own form of exposure:

- Partnering with the league itself: building reputational credibility and opening up brand endorsements and exposure across the league, ensuring consistent coverage across geographical areas.
- Branding key equipment, infrastructure or moments in the game: building in constant visual references with an added bonus of tying the alcohol organisation to an authoritative process during the game, lending respectability and credibility to the branding. For example, 'DrinkWise' has established a partnership with the AFL to brand the score review process, which is then broadcast throughout a game.
- Partnering with individual teams (often in a hierarchy reflecting the value of the deal, e.g. 'premier partner', 'major partner', 'platinum partner', 'premier partner' and 'associate partner'): creating multiple opportunities for brand exposure to the loyal fans of the team, simultaneously building brand loyalty to the alcohol product.
- Branding the playing jerseys, training kit or merchandise of individual teams or the league: creating pervasive brand exposure and opportunities for building brand loyalty through:
 - visibility of the brand during the game and player interviews
 - implied endorsement by the individual player through the wearing of the brand
 - personal ownership of the replica kit by adults and children, bringing the brand into homes, onto favourite sports clothing, and therefore into social sporting events
 - assimilation of player and brand such that visual replication of the player requires visual replication of the brand.
- Becoming an official supplier of alcohol to a club: implying a preference of team players towards a certain brand and potentially involving visual and aural references by players endorsing/enjoying the products. For example, Carlton & United Breweries is the official 'Beer Partner' of the Parramatta Eels.

EXAMPLES OF NRL ALCOHOL-BRANDED KIT



Source: 24, 25

EXAMPLES OF NRL ALCOHOL ADVERTISING THROUGH CLUB MERCHANDISE AND TRAINING KIT



Source: 26, 27, 28, 29

EXAMPLES OF NRL CORPORATE PARTNERSHIPS

Gold Partners



Premier Partners

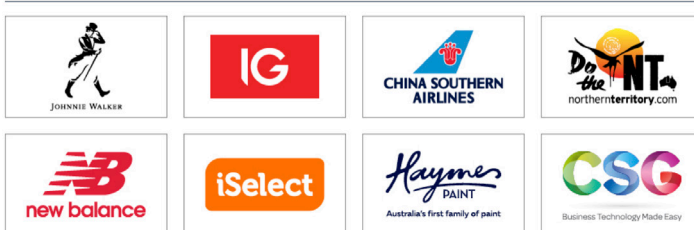
Beverage Partners



Source: 30, 31, 32

EXAMPLES OF AFL CORPORATE PARTNERSHIPS

MAJOR PARTNERS



MAJOR SUPPORT PARTNERS



Source: 33, 34

4. Alcohol advertising deals in the AFLW and NRLW appear less prevalent than in the men's leagues, but data is limited

Much of the data on alcohol advertising deals with both codes does not distinguish between the men's and women's teams at a club level.

Of the eight AFL clubs who publish their corporate partnerships for their men's and women's teams separately, five AFLW teams (Adelaide Crows, Brisbane Lions, Collingwood, Fremantle and GWS Giants) do not currently have advertising deals with the alcohol industry. The three clubs whose websites indicate bespoke alcohol partners for their women's team are Carlton (Coca-Cola Amatil), the Western Bulldogs (Two Birds Brewing), and North Melbourne (Carlton & United Breweries). The two other teams in the competition (Geelong Cats and Melbourne Demons) did not publish their partnerships separately, and these data were not counted to avoid duplicating findings. The AFLW league is sponsored by Treasury Wine Estates (Wolf Blass).

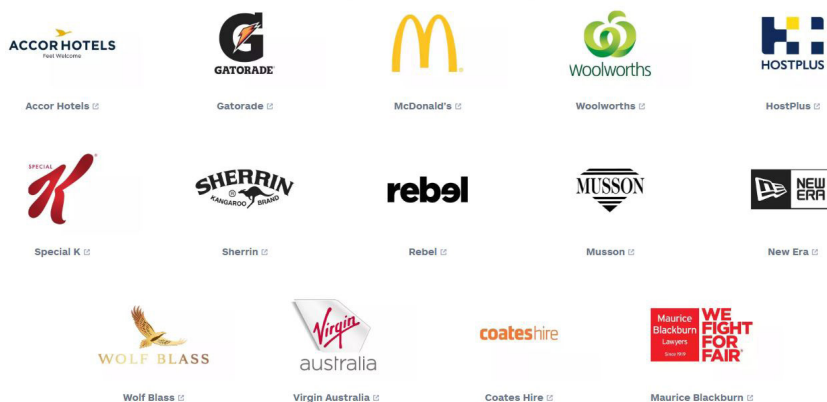
None of the four NRLW teams (Brisbane Broncos, St George Illawarra Dragons, New Zealand Warriors and Sydney Roosters) listed their commercial partnership arrangements independently of the men's teams. Notably, research indicated that the playing kit of the New Zealand Warriors did not include alcohol brands, unlike their male counterparts.

EXAMPLES OF AFLW CORPORATE PARTNERSHIPS

AFLW PARTNERS



Official Partners



Source: 35, 36, 37

Conclusion

This study finds that alcohol advertising deals are widespread in the AFL and NRL leagues. Advertising deals manifest in different ways, including corporate arrangements, branded merchandise and playing kit.

However, alcohol advertising deals are not a prerequisite for sporting success. One team in each league has no commercial partnerships with alcohol companies, namely the Melbourne Storm (winner - 2017 NRL Grand Final, runner up - 2018 NRL Grand Final), and the Western Bulldogs (winner - 2016 AFL Grand Final).

In addition, a number of others do not feature alcohol companies among their headline 'major' partners. For example, despite 17 of 18 AFL teams having an alcohol industry partner, none have an alcohol-branded jersey, while alcohol advertising deals appear less prevalent among the women's AFL and NRL codes. As highlighted in the examples from this report, clubs obtain commercial revenue from multiple other sources, suggesting they need not be dependent on accepting money from the alcohol industry.

Just four foreign-owned multinationals are responsible for 60 per cent of total alcohol advertising deals for the AFL, AFLW and NRL. This is reflective of the Australian alcohol market where Carlton & United Breweries and Lion (both foreign-owned) are estimated to account for almost 90 cents (88.6%) of every dollar of industry revenue from beer manufacturing in Australia in 2018-19³⁸, and Diageo Australia and Asahi Holdings Australia (both foreign-owned) are estimated to account for over a third (35.9%) of industry revenue from spirits manufacturing in Australia in 2018-19.³⁹ These multinationals are deliberately targeting Australian sports in order to increase sales and profit.

This study builds on previous research identifying that the AFL and NRL are currently used as a highly effective conduit for mass alcohol marketing during children's TV viewing hours.⁴⁰ Given the evidence that alcohol advertising drives children and young people's consumption of alcohol, and that alcohol is detrimental to children's health and wellbeing, there is a strong imperative for the AFL and NRL to transition away from alcohol industry advertising deals.

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