



**THE IMPACTS OF BANNING ALCOHOL ADVERTISING ON
MEDIA & ADVERTISING INDUSTRY, BREWERY FACTORIES
AND THE SOCIETY IN ADDIS ABABA.**

By

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Abbreviations and Acronyms

EBA	Ethiopian Broadcast Authority
EBS	Ethiopian Broadcasting Services
FBC	Fana Broadcasting Corporate
KII	Key Informant Interview
SPSS	Statistical Package for Social Studies.
USAID	United States Agency for International Development
WHO	World Health Organization of the United Nations

Table of Contents

Acknowledgements	iii
Abbreviations and Acronyms	iv
Table of Contents	v
List of Tables	viii
List of Figures	ix
Abstract	x
CHAPTER ONE	1
INTRODUCTION	1
1.1. Background of the Study.....	1
1.2. Statement of the Problem.....	2
1.3. Research Questions.....	4
1.4. Objectives of the study.....	4
1.5. Significance of the study.....	5
1.6. Scope of the study.....	5
1.7. Limitations of the Study.....	6
1.8. Structure of the study	6
CHAPTER TWO	7
REVIEW OF RELATED LITERATURES	7
2.1. Media and Its Roles	7
2.1.1. The Role of Media for Societal Development	8
2.1.2. The Role of Media Advertising in Business Promotion and Marketing.....	8
2.1.3. Types, Functions and Methods of Advertising	10
2.2. Alcohol Production, Consumption and Its Impacts	13
2.2.1. Overview of Alcohol Production in the world.....	13
2.2.2. Consumption of Alcohol and Its Impacts	13
2.2.3. Alcohol Advertising and Consumption Behaviors	15
2.3.1. Global Experiences	16
2.3.2. Regulation in Ethiopia: Banning Alcohol Advertisement on Media Outlets.....	18
2.4. Advertisements in Ethiopia: The Case of Alcohol Products.....	20
2.5. Conceptual/Theoretical Framework of the Study:	21
CHAPTER THREE	22

RESEARCH METHODOLOGY	22
3.1. Area of the Study	22
3.2. Population of the Study.....	22
3.3. Research Design.....	22
3.3.1. Quantitative Method:	23
3.3.2. Qualitative Method:	23
3.3.2.1. Key Informant Interviews (KII).....	23
3.3.2.2. Observation	24
3.4. Sampling techniques, procedures and data sources	24
3.4.1. Sampling techniques for youth population in Addis Ababa	24
3.4.2. Sampling techniques for brewery factories.....	25
3.4.3. Sampling techniques for media companies.....	25
3.4.4. Sampling techniques for advertising companies.....	25
3.5. Data Collection	26
3.6. Data Analysis Techniques.....	26
3.7. Ethical Consideration.....	27
CHAPTER IV	27
DATA ANALYSIS AND DISCUSSION.....	27
4.1 Response Rate.....	27
4.2 Descriptive Analysis and Discussion of the Public Survey Data.....	28
4.2.1. Demographic characteristics of the sample respondents.....	28
4.2.1.1. Gender and Age.	28
4.2.1.2. Marital Status	29
4.2.1.3. Education Qualification and Occupation	29
4.2.2. Alcohol drinking practice of the society	29
4.2.3. Impacts of the bill on alcohol drinking behaviors of the society	33
4.2.3.1. Public awareness on banning alcohol advertising on media outlets	33
4.2.3.2. Alcohol consumption and alcohol related violence in a family, neighborhood & the city of Addis Ababa over the past one year.....	33
4.3 Quantitative and qualitative analysis of the data from the broadcasting media houses	36
4.3.1. Profile of broadcasting media houses (TV stations)	36
4.3.2. The effects of the bill on business environment over the past one year-Quantitative Findings..	37
4.3.2.1. Effects on the number of viewers/audiences.....	37

4.3.2.2.	Effects on the advertising cost	37
4.3.2.3.	Effects on the labor force	38
4.3.3.	Qualitative research findings on the impacts of the bill on media houses business environment 39	
4.4	Quantitative and qualitative analysis of the data from the advertising companies	42
4.4.1.	Profile of the advertising companies.....	42
4.4.2.	The effects of the bill on business environment over the past one year-Quantitative Findings..	42
4.4.2.1.	Effects on advertising production cost.....	42
4.4.2.2.	Effects on the labor force of the advertising companies	43
4.4.3.	Qualitative research findings on the impacts of the bill on advertising companies	43
4.5	Quantitative and qualitative analysis of the data from the brewery factories	45
4.5.1.	Profile of the brewery factories.....	45
4.5.2.	The effects of the bill on business environment over the past one year-Quantitative Findings..	46
4.5.2.1.	Effects on alcohol production	46
4.5.2.2.	Effects on the labor force of the brewery.....	47
4.5.3.	Qualitative research findings on the impacts of the bill on business environment	48
CHAPTER FIVE		50
SUMMARY OF THE FINDINGS, CONCLUSIONS AND RECOMMENDATIONS.....		50
5.1.	SUMMARY OF THE FINDINGS	50
5.2.	CONCLUSIONS	51
5.3.	RECOMMENDATIONS	52
Reference		53
Appendix A.....		56
Public Survey Questionnaire.....		56
Appendix B		58
Structure Key Informant Interview (KII) Guide for Media Company.....		58
Appendix C		61
Structured Key Informant Interview (KII) Guide for Brewery Factory.....		61
Appendix D.....		64
Structure Key Informant Interview (KII) Guide for Advertising Company		64

List of Tables

Table 1: Research Design Matrix	26
Table 2: Response rate of the study	27
Table 3: Marital status of the respondents by gender	29
Table 4: Education qualification and employment status of the respondents by gender	29
Table 5: Alcohol drinking by gender	30
Table 6: Reasons for decreased/increased/remained the same	32
Table 7: Public awareness about the bill that bans alcohol advertising on media outlets.	33
Table 8: Alcohol consumption and alcohol related violence in a family, neighborhood and the city of Addis Ababa over the past one year.	34
Table 9: Company Profile of FBC and EBS	36
Table 10: Average number of viewers of the media houses by years.	37
Table 11: Average advertising cost on FBC and EBS TVs over the years.....	38
Table 12: Total number of employees in FBC and EBS-TV over four years.....	38
Table 13: Profile of the advertising companies	42
Table 14: Advertisement production cost for media broadcasting over the years.....	42
Table 15: Profile of Heineken Breweries SC.....	46
Table 16: Total Annual Beer Production in Litres.....	46
Table 17: Total number of employees of Heineken Breweries over the years	47

List of Figures

Figure 1: Percentage of respondents by age categories and gender (source: own survey data,2020).....	28
Figure 2: Percentage and number of respondents drinking alcohol in different age groups. Source: Own Survey Data (2020).....	30
Figure 3: Frequency of drinking alcohol	31
Figure 4:Change in alcohol drinking practice among the public.....	32
Figure 5: Annual Growth Rate of the FBC and EBS Labour Force (Author’s Computation)	39
Figure 6: Average annual number of employees in two advertising companies	43
Figure 7: Annual Growth Rate of Breer Production (Source: Heineken Breweries SC 2020).....	47
Figure 8: Heineken Company Annual Growth Rate for Labour Force (Source: Heineken Breweries SC, 2020	48

Abstract

This study examined the impacts of banning alcohol advertising on media houses, advertising industries, brewery industries and the society in Addis Ababa. It specifically aimed to understand the perception and opinion of the public towards alcohol consumption since the bill was passed, particularly among the youth community in Addis Ababa. The study employed a mixed method, conducted a public survey and randomly interviewed 187 dwellers of Addis Ababa, and also held and in-depth key informant interview with the representatives of two media houses, two advertising companies and one brewery factory and gathered both qualitative and quantitative data.

The result of the study reveals that the banning of alcohol advertising on media outlets has resulted in both positive and negative impacts. As a result of the enforcement of the bill that bans alcohol advertising, the exposure of the youth to alcohol has reduced, which in turn may contributed to the reduced number of alcohol drinking and alcohol related violence in the city of Addis Ababa. Despite its positive impacts for societal well-being, the enforcement of the bill banning alcohol advertising on media outlets, however, has severely impacted the business environments of the media and advertising sectors. The bill has significantly contributed for the decreased revenue, reduced labour force and overall market share, which in turn decreased the profitability of the companies. As such, the media and advertising sectors should assess their business operating environment to identify and tap potential opportunities with other industries and diversify their client base. The government should also design strategies that can sustain the development of these two sectors, without compromising the well-being of its citizens.

CHAPTER ONE

INTRODUCTION

This chapter presents the background of the study, statement of the problem, research objective, research question, and significance of the study, scope and limitation of the study and organization of the study.

1.1. Background of the Study

With a population of more than 104 million people, Ethiopia is the second most populous country in Africa and represents a largely untapped consumer market. There is growing demand for alcoholic beverages amongst youth members of society. During the past five years foreign companies have made substantial investments in the Ethiopian alcoholic beverages industry and several manufacturers have expanded their installed capacity to meet the rising demand, particularly among young people. There is growing concern about alcohol consumption among young people. Alcohol abuse and dependence have been recognized as significant health issues for many years. Irresponsible and excessive consumption can produce damaging health consequences at great cost to the individual, their family and society (Gunter, et al., 2009).

A growing body of research indicates a positive association between alcohol advertising and alcohol consumption among young people. For example, (Gnrube & Wallack, 1994) showed that greater recall of alcohol advertising is significantly related to more positive beliefs about alcohol use, which in turn are associated with greater future intentions to drink alcohol among children and adolescents. Similarly, (Unger, et al., 2003) demonstrated a positive association between recall of alcohol brands and current alcohol consumption among adolescents. Further, exposure to alcohol advertising directly and positively predicts alcohol consumption for students of middle and high school ages (Adlaf & Kohn, 1989; Collins, et al., 2003).

Various studies were undertaken to demonstrate the negative impacts of alcohol advertisement on media outlets on consumption behavior of youth population and generally on the society well-being. Following these studies and continued lobbying by the concerned stakeholders, some policy measures have been taken lately by the government of Ethiopia. In February 2019, the Parliament of Ethiopia approved a bill, entitled the “Food and Medicine Administration Proclamation” which banned alcohol promotion on broadcasting media outlets. The bill also puts an age cap on alcohol

drinking, where it is made illegal to sell any alcoholic drink to anyone under the age of 21. It is to be recalled that the first draft of the bill carried more moderate provision with regards to advertisement of alcoholic products on broadcast media. It stated that, “Any alcoholic drink whose volume is more than 10 percent may only be advertised through broadcast from 9:00 PM in the evening to 6:00 AM in the morning.” However, later, the article was amended, banning all alcohols irrespective of their volume not to be advertised in the timetable.

Since the initial draft bill was tabled, several industry players in both alcohol beverage industry as well as media, expressed their dismay over the stringent provisions. Many media owners criticized the bill for being very conservative, which they fear will affect their income from advertisement. The alcoholic beverage industry is one of the major sources of income for many media agencies via advertising. The industry is also known to sponsors several television and radio programs.

According to WHO (2018), bans and comprehensive restrictions on alcohol advertising, sponsorship and promotion are impactful and cost-effective measures to prevent and reduce alcohol harm. Enacting and enforcing such bans or comprehensive restrictions in the digital world will bring public health benefits and help protect children, adolescents and abstainers from the pressure to start consuming alcohol.

The bill had a grace period of three months from publication to ban advertising of alcohol on broadcast media. It has been one year since the ban implemented all over the country. As such, this study would aim to evaluate the impact of the bill on selected brewery factories, media and advertising companies and on the perception of the youth towards alcoholic beverage.

1.2. Statement of the Problem

Broadcasting media, particularly TV and Radio advertising plays an important role in business promotion and marketing as it serves as a useful instrument to attract and influence customers. Katke (2007) defines advertisement as an effective way to influence the mind of viewers and gives viewers’ exposure towards a particular product or service. According to Morden (1991), advertising is used to establish a basic awareness of the product or service in the mind of the potential customer and to build up knowledge about it. There are more than six main TV and Radio stations in Ethiopia, the majority of which are publicly owned or pro government. Almost all the stations have been struggling to improve their programs content and quality to attract more

viewers. In most of the cases, the media houses look for strong client to use their channels to advertise their products or services.

With the recent increase in foreign investment by large multinational beer companies in Ethiopia's brewery industry, the competition for market penetration and increase the market share has been stiff among the existing brewery companies and new entrants. Dashen, Heineken with different products, Meta, Raya, Zebidar, Habesha and St. George are some of the beer companies operating in Ethiopia. All these companies were using TV advertising and outdoor displays such as billboards and wall branding for market promotion and increase their market share. With the aim to increase their sales and market share, the brewery companies had heavily invested on TV and outdoor advertising, there by contributed for the recent growth and development of the media and advertising companies in Ethiopia. Advertising costs mainly the production as well as airtime are increasing from time to time in Ethiopia. Brewery companies had been spending large amounts of money for production and airtime with TV advertisements to occupy consumers' hearts and minds with their products and services. This situation has made the breweries the backbone for many media houses (particularly private owned ones) and vital for the continuation of broadcasting programmes liked by the public as the main sources of revenue for broadcasting houses (TV channel) are advertisements.

Nevertheless, with increased production and promotion of alcohol increased the consumption of alcohol and caused excessive drinking, which in turn caused mortality and social disorder in the society, particularly among young population of Ethiopia. Due to excessive drinking of alcohol, young people are susceptible to short-term social harms such as suicides and risky sexual behavior, and long-term physiological effects such as loss of memory and chronic disease, resulting from alcohol consumption (Mekonnen, 2019). The problem of excessive alcohol drinking, particularly by youth further exacerbated by unregulated alcohol advertisement through different media outlets in Ethiopia. An alcohol advertisement is any message (the content of which is controlled directly or indirectly by the advertiser) communicated in a medium with the intent to influence their choice, opinion and behavior with respect to product (Mekonnen, 2019).

As part of the Ethiopian government efforts to promote healthy living in the country, all forms of advertisement of alcoholic drinks was banned in February 2019. In general, the measure taken by the government is believed to be correct and appropriate. However, several industry players in

both beverage industry as well as media, expressed their discontent over such tight measure of the government. Many media owners criticized the bill for being very conservative, which they fear will affect their income from advertisement. As it is well known, the media industry particularly broadcasting houses and advertising companies were heavily reliant on the brewery industries for their revenue. Of all the industries, alcohol or brewery factories spend a lot of money on advertising, relying on the various forms of media out there to spread awareness about their products and increase their sales. With the enforcement of the ban, the broadcasting medias and advertising companies, were found struggling to survive and continue their business operation due to loss significant revenue from the brewery factories. The extent of the impact, however, induced by the ban on the broadcasting houses and advertising companies has not been properly studied yet. Thus, the researcher took the initiative to embark on assessing the immediate impacts of the bill that bans alcohol advertising on broadcasting media industry, advertising companies and the society (particularly youth population) in Addis Ababa. In addition, the researcher has also interested to explore the impacts of the bill on brewery industries to a certain extent so as to come up with a comprehensive understanding about all effects of the bill (both positive and negative).

1.3. Research Questions

This study tries to answer the following three questions.

- i. What are the effects of the bill, which bans alcohol advertising on the broadcasting media houses, advertising companies and brewery factories business environment over the past one year?
- ii. How has the bill influenced the perception of the public towards alcohol consumption, particularly the youth community in Addis Ababa?
- iii. What lessons can be drawn to enhance the role of a media to induce positive influence on the society, particularly youth community in Addis Ababa and recommend actions to develop the media industry in Ethiopia?

1.4. Objectives of the study

The overall objective is to examine the immediate impacts of banning alcohol advertising on broadcasting media and advertising industries and the society in Addis Ababa.

The specific objectives are:

- To investigate the major effects of banning alcohol advertising on the media industries' and advertising companies' as well as breweries' business environment over the past one year.
- To understand the perception and opinion of the public towards alcohol consumption since the bill was passed, particularly of the youth community in Addis Ababa.
- To draw lessons and provide policy recommendations to develop the media sector in Ethiopia and enhance the role of a media to induce positive influence on the society.

1.5. Significance of the study

The researcher believes that this study will enable to better understand the contribution and role banning alcohol promotion on broadcasting media outlets in promoting healthy lifestyle among the youth community in Addis Ababa. It will further enlighten to what extent has the new bill affected the business environment of the brewery factories and media industries. Almost all studies so far undertaken by social scientists focused on evaluating the impacts of banning alcohol marketing among youth particularly in developed countries. Whereas, this study is expected to explore the new dimension of the banning impacts on the brewery factory and media industries business environment in addition to the impacts on youth drinking behaviors. By doing so, the study will help Ethiopian society get a better understanding of the issue and provide tangible evidences to the government to develop/revise and enforce alcohol control policies and legislations that protect the health of the youth without affecting the business environment of the brewery factories, media and advertising industries, significantly.

1.6. Scope of the study.

The study is about the impacts of banning alcohol advertising on brewery factories, media industry and the society in Addis Ababa. As such, study area of this study is limited to Addis Ababa. The research design of this study is a mixed method, which comprises both qualitative and quantitative methods to answer the research questions. There could be various impacts that the banning of alcohol advertisement caused on business environment of the brewery and media industries as well as the lifestyle of the youth, however, the focus of this study was on variables related to the production and profitability of the brewery factories and media industries and also on the

perception of the youth towards alcohol drinking. The level of analysis is descriptive for both qualitative and quantitative data.

1.7.Limitations of the Study

There are various limitations that this study is expected to face. Primarily, the scope of the issues, which this study is trying to cover is very broad and covers three sectors or aspects: alcohol industry, media industry and the general public. This requires deeper and thorough investigation to gain an in-depth understanding about the entire set of factors contributing to the impacts this study is trying to study. Secondly, the study is restricted to respondents in Addis Ababa, who cannot represent the view and perception of respondents in other cities of the county because the resources and time constraints limited the researcher to cover the respondents in other cities. Thirdly, as this study has focused on very recent phenomenon, there would be lack of related literature conducted in Ethiopia on topics related to the banning of alcohol advertising and this will be another limitation of this study. Moreover, the design of this study and its related tools (structured guideline, checklist and questionnaires with close ended questions) might also limit the outcome of the study. Therefore, the results cannot be presented in a generalized form and may not represent the whole country (Ethiopia), since the sample is limited to Addis Ababa.

1.8.Structure of the study

This study is organized into five chapters. The first chapter introduces the study. It provides the background of the study, statement of the problem, research objectives, research questions, significance of the study, scope and limitations of the study as well as the organization of the study. Chapter two provides the literature review related to this study. It presents the review of literature related to the role of media, its importance for the society and business community, the production, consumption and impacts of alcohol beverage, policies and regulations to advertising alcohol from global and local perspective.

Chapter three discusses the methodology of the study. It describes the study area, study population, research design, sampling technique, sample size, data collection methods and data analysis procedures as well as ethical consideration in undertaking this study.

Chapter four presents result and analysis of findings in the study. Finally, chapter five concludes the study. It provides the summary, conclusion and recommendations.

CHAPTER TWO

REVIEW OF RELATED LITERATURES

This chapter presents the review of literature related to the role of media, its importance for the society and business community, the production, consumption and impacts of alcohol beverage, policies and regulations to advertising alcohol from global and local perspective.

2.1. Media and Its Roles

Oxford English dictionary defines media as the main ways that large numbers of people receive information and entertainment, that is television, radio, newspapers, and the internet the news/broadcasting/national media. It refers to the communication channels through which we disseminate news, music, movies, education, promotional messages and other data. It includes physical and online newspapers and magazines, television, radio, telephone, the Internet, fax and billboards. The word was first used in respect of books and newspapers i.e. print media and with the advent of technology, media now encompasses television, movies, radio and internet. In today's world, media has become part of our daily needs and it would be hardly possible to imagine life without it. In this era of information, media has taken a central and most prominent position in creating and shaping public opinion and empowering a society. It plays an important role in the welfare of the society, working as an informer, an educator, a form of entertainment and an opinion influencer. In general, these days, media is widely considered as the fourth pillar of a state on top of the three traditional pillars of any state: i.e. legislative, executive and judiciary. This is because it plays a linking role between the public and any government. An American human rights activist Malcom X once said "The media's the most powerful entity on earth. They have the power to make the innocent guilty and to make the guilty innocent and that's power. Because they control the minds of the masses" (Great, 2017).

The recent advancement of technologies, particularly of information communication technologies (ICT), has transformed the power of media to the whole new level with the introduction of the Social Media. Obar and Wildman (2015) define Social Media as a computer-based technology that facilitates the sharing of ideas, thoughts, and information through the building of virtual networks and communities. As such, the social media users engage via computer, tablet, smartphone, web-based software or web application, often utilizing it for messaging contents such as personal information, documents, videos, photos and location.

2.1.1. The Role of Media for Societal Development

Media and society are closely related to each other. The extensive impact of media on society can easily be seen these days. Media reflects our society, how it works and what it constitutes. With the advancement in technological area, our society has also observed the expansion in the thoughts and ideas of people. Every single invention starting from the printing press to the latest smartphones our society has accepted it. Earlier people used to communicate things with the help of sketch and print forms but as time passes the medium became more advanced. Today people are just a click away from any and every information that is available on the internet. There are various forms of media that help to inform, educate and entertain our society. Media can be in print form that is through newspapers, books, magazines etc. Media includes an electronic form for spreading information which is one of the most used media of mass communication. With the help of radio and TV, listeners and viewers not only get updated but it also creates an understanding of current happenings. Most recently, Social Media is becoming one of the most popular and most accessed media of communication these days. Social media has brought different people from the different geographical area on one platform on which they can share their feeling, ideas, emotions, information and much more.

2.1.2. The Role of Media Advertising in Business Promotion and Marketing.

Media advertising plays an important role in business promotion and marketing as it serves as a useful instrument to attract and influence customers. Katke, (2007) defines advertisement as an effective way to influence the mind of viewers and gives viewers' exposure towards a particular product or service. According to Morden, (1991) advertising is used to establish a basic awareness of the product or service in the mind of the potential customer and to build up knowledge about it. Arens, (1996) defined advertisement as communication process, a marketing process, an economic and social process, a public relations process or information and persuasion process. Nowadays, advertising has become one of the crucial commercial activities that helps a business to survive in such the competitive globalized market. Sharing culture, customs, traditions, habits, technologies and the likes is fast increasing across the world in a real-time. This is basically the demonstration of how the world is becoming more globalized as time goes on. In a globalized world with advanced technology, the distance between market and its customers doesn't really matter. In the

present digital world, firms are hugely investing on media advertising to spread maximum information about products to influence the buying behavior of customers and determining the factors that have direct or indirect effects on buying behavior like purchasing power Chandon et al. (2000).

According to Belch et al. (2012) advertising is the best-known and most widely discussed form of promotion, probably because of its pervasiveness. This is particularly true for companies whose products and services are targeted at mass consumer markets. Aside from this, there are several reasons why advertising is such an important issue for many marketers. First, it can be a very cost-effective method for communicating with large audiences. Second, it can be used to create brand images and symbolic appeals for a company or brand. Effective advertising can be described as a paid form of communicating a message which is persuasive, informative, and creative designed to influence purchasing behavior or thought patterns and meets the goals that it set out to do (Colley et al. 1984).

Popularity is the aim of effective advertising (Laurie et al.,2011), which shapes the attitude and finally leads to purchase intention (Shimp, 2003). Firms advertise their products and services through different techniques to effectively convey their message using creative commercial ads to influence consumers' buying behavior and purchasing decision. Consumer buying behavior refers to the methods involved when individuals or groups choose, buy, utilize or dispose of products, services, concepts or experiences to suit their needs and desires (Solomon, 1995). Various factors influence the consumers' buying behaviors based on which firms plan and execute superior business strategies (Khaniwale, 2015). Consumers were found to prefer products advertised using familiar songs (Macinnis and Park,1991). Social role and image reflect that ads influence individual life-style and the extent to which an individual seeks to present him or herself in a socially acceptable manner (Haider, T and Shadman S., 2017). In general, entertainment has been termed as a significant advertising strategy for increasing advertising effectiveness and imploring them to make a purchase (Madden & Weinberger, 1982).

Advertising, specially through properly targeted media, can bring significant results to any business such as attracting new customers, retaining the existing customers, increasing sales volume and market share. Effective communication through advertisement leads the consumers toward the purchasing of brand (Belch and Belch, 2001). Media, as an effective communication

channel play curtail role for advertisement. For instance, in a research conducted in 2009 it was observed that one of most influential ideas spread by the media is society's perception of beauty and attractiveness. The thin beautiful woman and the handsome muscular men are seen everywhere. And as the influence of media increases, the pressure to hold on to these ideals increases (Russello, 2009). The mass media is the most powerful way to spread the images of thin beautiful women and handsome muscular men that represent sociocultural ideals (Tiggemann, 2003). Thus, advertising promote social messages and life-style by illustrating the position of ideal consumer and stimulates consumer's willingness to purchase (Pollay & Mittal, 1993).

2.1.3. Types, Functions and Methods of Advertising

According to Sandage, 2001, there are seven types of advertising:

1. **Brand advertising** – it is usually visual and textual advertising. Such advertising is intended primarily to achieve a higher level of consumer recognition of specific brands.
2. **Commerce and retail advertising** - advertising of this type focuses on the specific production organization or product sales: it can be a service company or a shop. The main task of the commerce and retail advertising is to encourage the inflow of potential buyers by informing them about the place and the main terms of the provision of certain goods or services.
3. **Political advertising** - one of the most prominent and the most influential types of advertising. A positive image of the politician is formed.
4. **Advertising with a feedback** – this type involves an exchange of information with potential customers. Most common way is a direct mail to specific recipients that has the greatest interest for advertisers as a possible buyer (e.g. in the form of catalogs).
5. **Corporate advertising** - such advertising almost never contains advertising information (in the conventional sense of the word), and serves for the preparation of the public opinion (a certain segment of buyers) to support the point of view of the advertiser.
6. **Business advertising** - professionally-oriented advertising, intended for distribution among groups formed by their belonging to a particular occupation. Such advertising is spreading mainly through specialized publications.
7. **Public or social advertising** - unlike business advertising, it is oriented to the audience, united mainly by people social status - for example, single mothers, childless couples, teenagers, etc.

Kotler (2002) categorized the functions of advertising into four:

1. Economical function - The nature of the economical function of advertising is first of all to stimulate sales and increase the volume of profits from the sale of a certain product for a certain unit of time. Advertising informs, creates the need for a product or service, and encourages people to purchase.

2. Social function - Advertising information has a significant impact on the formation of the consciousness of each individual. When advertising is addressed to consumers, besides the promotion of a product, it also helps to form ideological values of the society and at the end has an effect on the character of social relations causes consumer instincts, encouraging people to improve their financial state improves the culture of consumption. Comparing different products and services, the consumer, in any case, tends to get really the best.

3. Marketing function - Advertising is an important component of marketing. Advertising entirely connected to the tasks of marketing, whose final aim is the full satisfaction of customer needs concerning goods and services.

4. Communicating function - Advertising is also one of the specific forms of communication. It is designed to perform an appropriate communicating function, linking together advertisers and consumer audience by the means of information channels.

Advertising has become a complex form of communication with various methods of disseminating messages to customers. The followings are the most common methods of advertising for different businesses.

Print advertisements/media: Is one of the oldest and most commonly used medium of advertising by businessman. It is also called press advertising and includes advertising through newspaper, magazines, journals and the like. These are the sources of news, opinions and current events (McQuails, 2005).

Electronic Advertisements: Electronic media means broadcast or storage media that take advantage of electronic technology. They may include television, radio, internet/online and any other medium that requires electricity digital encoding of information. The term 'electronic media' is often used in contrast with print media (Belch et al. 2007). According to Belch and Belch (2003), as compared to other advertising medium, radio advertising has many advantages over other media, including cost and efficiency, selectivity, flexibility, mental imagery, and integrated marketing opportunities. Radio is probably the most flexible of all the advertising media because

it has a very short closing period, which means advertisers can change their message almost up to the time it goes on the air. Radio commercials can usually be produced and scheduled on very short notice (Belch and Belch, 2003). Whereas, TV advertisements is an ideal advertising medium due to its ability to combine visual images, sound, motion, and color presents the advertiser with the opportunity to develop the most creative and imaginative appeals of any medium (Belch et al.,2007). In comparison to Television, a radio is less effective as it lacks visual impact. According to Abideen & Saleem (2011), Television Advertisement is a best way to promote products and services in front of millions of consumers. TV advertisement has the biggest effects on audiences and persuade them to start purchasing processes and has strong influence on consumers' perception (Jolodar & Ansari, 2011). Internet or online advertisement refers to any advertisement that is accessible via the internet. Being on the internet can be a cost-effective way to attract new customers and reach to a global audience at a low cost. Many customers research businesses online before deciding whom to buy from. There are various ways to promote products and services of a firm online through paid advertising or to improve your search engine rankings including promoting products or services on social media sites, blogs and search engines and other websites. A dominating force in online advertising is through mobile devices such as cell phones, iPads, Kindles, and other portable electronic devices with internet connectivity. Current trends in mobile advertising involve major use of social media such as Twitter, Instagram, Snapchat, LinkedIn, and Facebook, WhatsApp, Telegram and so many others. Online advertisement, particularly mobile advertising is increasingly gaining importance as a method of reaching new customers.

Outdoor Advertisement: refers to methods of advertising that are designed to reach consumers when they are out of their homes. Since consumers spend more time out of their homes than in them, outdoor advertising is highly effective. This type of marketing can take many forms, from billboards to signs posted on mass transit. Of all the forms of outdoor advertising, billboards are the most popular and commonly used around the world. Billboards are usually situated near roadways that receive a lot of traffic. The key advantage of billboards is that they are easily visible and very cost-effective, thus making them a very effective marketing tool. Outdoor advertising is also displayed on mass transit. Ads that are placed on or inside of public buses, taxis and trains are all examples of out-of-home advertising displayed on mass transit. Pieces of outdoor furniture that are designed for public use are also used as modes of outdoor advertising. Examples include park

benches, shelters for public buses, kiosks for public telephones, outdoor newspaper dispensers, and the like.

2.2. Alcohol Production, Consumption and Its Impacts

2.2.1. Overview of Alcohol Production in the world.

Alcoholic drinks are broadly categorized into three groups: beer, wine, and spirits. Two of the three groups i.e. beer and wine are the most commonly produced and consumed alcoholic beverages in the world. According to www.alcohol.org China, USA and Brazil are the first, second and third largest producers of beer worldwide in 2017 with annual production rate of over 112 billion 12 oz, 61.4 billion 12 oz, and 39.4 billion 12 oz beers, respectively. Only South Africa from the African countries was listed in the top 25 beer producers in the world with an annual production rate of over 9.1 billion 12 oz beers in 2017 (www.alcohol.org). The production of wine had a different set of countries who assumed the first, second and third ranks in the world in 2017. Italy, France and Spain were ranked the top three producers of wine in the world with annual production rate of over 5.67 billion, 4.9 billion, and 4.3 billion bottles of wine, respectively (ibid). Wise Guy Report predicted the global alcoholic beverage market to grow at a compounded annual growth rate of 4.09% for the next six years (Kindlin, 2019).

In Ethiopia, alcoholic beverage in its all forms (beer, wine and spirit/liquor) has been increasing over the years. Liquor production increased from 5.2 million liter in 2012 to 12.3 million liter in 2019 (Feysa, H. 2019). In 2019, beer production has reached to 7 million hectoliters of beer per year and the number of brewery factories has also increased to 12 in Ethiopia (Asoko, 2020). There are two wineries in the country with a combined production capacity of almost 12 million bottles of wine per year (Dibaba, 2016).

2.2.2. Consumption of Alcohol and Its Impacts

A lot is written and documented in literatures on consumption of alcohol and related impacts on people's health and well-being. Despite its harmful effects, global consumption of alcohol has been increasing over the years, particularly among youth population. According to the World Health Organization (2018), total alcohol per capita consumption in the world's population over 15 years of age rose from 5.5 litres of pure alcohol in 2005 to 6.4 litres in 2010 and remained at the same level till 2016. The highest worldwide recorded alcohol consumption was in the form of spirits with 44.8% followed by beer (34.3%) and wine (11.7%). The WHO report estimate that one

quarter (25.5%) of all alcohol consumed worldwide is in the form of unrecorded alcohol – i.e. alcohol that is not accounted for in official statistics on alcohol taxation or sales as it is usually produced, distributed and sold outside the formal channels under governmental control.

The consumption of both recorded and unrecorded alcoholic beverages in Ethiopia is increasing at higher rate. The study by Ayano et al., (2019) suggested considerable recent increment in the magnitude of hazardous alcohol consumption in Ethiopia.

Alcohol is consumed worldwide but the majority of people in the world abstained from alcohol in the past 12 months. Gender, age, health status, the economic wealth in a country, lifestyle choices, religion and cultural norms have an impact on alcohol use. Such factors also influence the form in which alcohol is consumed. For instance, unrecorded alcohol is often cheaper and therefore may be more produced and consumed in low income countries. Some countries ban alcohol use, resulting in low alcohol per capita consumption and in unrecorded consumption accounting for a high share of overall alcohol consumption in a country. Worldwide, women are more often abstainers than men are, and women who consume alcohol drink less than men do.

Levels of alcohol consumption can be measured using several indicators. One is the prevalence (or the number) of current drinkers or abstainers in a country or region. Two of the other most important and commonly used indicators are total alcohol per capita consumption in litres of pure alcohol per person per year and alcohol consumption in grams of pure alcohol per person per day; the latter indicator can be converted from the previous one for total population or estimated per capita for the drinking population only.

Consumption of alcohol, particularly excessive drinking, is one of the risk factors for mortality and social disorder in the world. Globally, alcohol consumption causes 2.8 million premature deaths per year, out of which 75% are younger than 70 years (Ritchie and Roser, 2020). In Sub-Saharan Africa (SSA) alcohol is among the most significant risk factors for death and a high risk for negative sexual behaviors resulting in HIV infection. A study conducted among high school adolescents in Ethiopia from 2001 to 2002 reported that about 8.9% drunk alcohol at least on a weekly bases, where as other reports among students in southern Ethiopia and a private school in Addis Ababa found a prevalence of 57.7% and 19.2% respectively year (Reda, et al., 2012). Excessive consumption of alcohol is common in sub-Saharan Africa, and it is one of the sever risk factors for diseases, injury and death including high risk of contracting HIV by affecting the

behavior of the individual (Getachew, et al., 2017). Alcohol accounts for 1.8 million deaths every year, in which, it causes 3.2% of all deaths and 40% of disease burden globally (Mekonnen, 2019).

According to the latest WHO report published in 2018 the harmful use of alcohol resulted in an estimated 3 million deaths (5.3% of all deaths) globally in 2016. The effects of alcohol consumption on mortality are greater than those of tuberculosis (2.3%), HIV/AIDS (1.8%), diabetes (2.8%), hypertension (1.6%), digestive diseases (4.5%), road injuries (2.5%) and violence (0.8%). In addition to causing mortality, the report further described the effect of alcohol to a large burden of disease and injury causing 132.6 million disability-adjusted life year in 2016 (WHO, 2018). Alcohol Deaths in Ethiopia reached 1,077 or 0.17% of total deaths. The age adjusted Death Rate is 1.66 per 100,000 of population ranks Ethiopia 91st in the world (WHO, 2018).

2.2.3. Alcohol Advertising and Consumption Behaviors

Kotler & Armstrong (2010) defined advertisement as “any paid form of non-personal presentation and promotion of ideas, goods and services by an identified sponsor”. It is the dissemination of information by marketer relating to a product, service or an idea through different channel of communication or medium, such as newspaper, radio, television, billboards or magazines by a recognized source (Akanbi and Adeyeye,2011). Alcohol advertising in the broadcast media is just one aspect of a marketing mix that includes radio, print media, billboards, sponsorships and alcohol-branded products. Young people have high exposure to these recurring positive messages about alcohol, which, over time, helps to create or reinforce their attitudes and beliefs and in turn can influence their intention and subsequent drinking patterns (Dring& Hope, 2001). In general, young people tend to prefer to think and talk about events or things that excites them. Most of the time, advertisers seen taking advantage of this kind of behaviors of people when they present an advert. They usually use humor and fun to make advertisements attractive, interesting and easy to remember. Advertisements are usually momentary when they are portrayed on TV, but they remain in people’s memory for a long period. This is mainly due to the fact that advertisements are depicted using pictures or videos of different social groups, social behaviours and social settings in action. In most cases, very influential people like celebrities are usually used to portray particular behavior or actions. When such a people play a role in product or services advertisement, all the things portrayed in the advertisements are more likely to be believable and would be easier for younger people in particular to adopt those actions and behaviors. Austin, Roberts and Nass

(1990) emphasized that television can influence people because it contains a wealth of distorted depictions. The visual images of behavior portrayals provided by television can become one of the factors that influence behavior of individuals. The way behaviors such as fun, happiness and others, portrayed in the alcohol advertisement can encourage young people's drinking pattern. Most alcohol advertisements include a phrase 'enjoy responsibly'. Despite the message behind the phrase, it simply means that alcohol is meant to be enjoyed.

2.3. Policies, Regulations, Laws, Bills Banning Advertisement of Alcoholic Products on Media Outlets.

2.3.1. Global Experiences

The World Health Organization (WHO) has specified that the advertising and promotion of alcohol needs to be controlled. In September 2005, the WHO Euro Region adopted a Framework for Alcohol Policy for the Region, which has five ethical principles (WHO, 2006). European Charter on Alcohol: the five ethical principles and goals

1. All people have the right to a family, community and working life protected from accidents, violence and other negative consequences of alcohol consumption.
2. All people have the right to valid impartial information and education, starting early in life, on the consequences of alcohol consumption on health, the family and society.
3. All children and adolescents have the right to grow up in an environment protected from the negative consequences of alcohol consumption and, to the extent possible, from the promotion of alcoholic beverages.
4. All people with hazardous or harmful alcohol consumption and members of their families have the right to accessible treatment and care.
5. All people who do not wish to consume alcohol, or who cannot do so for health or other reasons, have the right to be safeguarded from pressures to drink and be supported in their non-drinking behaviour.

With the aim to reduce the burden of harmful alcohol use, the World Health Organization (WHO, 2017) has recommended three "best buys," a) Enforcing bans on alcohol advertising; b) Restricting access to alcohol, c) Increasing alcohol taxes. The most cost-effective ways to reduce alcohol-related harm is to make alcohol less available and more expensive and to prohibit alcohol

advertising (Nasheet Peer,2017). Evidence suggest that comprehensive alcohol marketing restriction are a cost-effective strategy for reducing the harmful use of alcohol if they are well enforced (Marissa B. Esser & David H. Jernigan, 2018)

According to the WHO, the strength of alcohol marketing policies varies widely across regions and countries; in 2012, nearly 40% of the 159 countries that provided information to the WHO report that they had no restrictions. In 2018, WHO reported that several countries have adopted advertising restrictions since 2012, and the majority of responding countries now have some type of restriction for all media types except Internet (48%) and Social Media (47%). Total bans were most common for national television (26%) and national radio (26%). As in 2012, the greatest number of countries reported no restrictions on the Internet and social media, suggesting that regulation in many countries continues to lag behind technological innovation in marketing. In 2016, 123 countries reported on alcohol marketing restrictions across all media and beverage types. Of these countries, 51 (41%) had total bans for all media types and 35 (28%) had no regulations on any media type. Most of the countries that reported no restrictions across all media types were located in the African (17 responding countries) or Americas regions (11 responding countries).

Countries such as France, Norway, Russia, Ukraine, Myanmar, Sri Lanka, and Kenya have banned all alcohol advertising on television and billboard. However, in other countries like in the United States, the standard is that alcohol advertisements can only be placed in media where 70% of the audience is over the legal drinking age. Alcohol advertising's creative messages should not be designed to appeal to people under the age of 21, for example, using cartoon characters as spokespeople is discouraged. Advertising cannot promote brands based on alcohol content or its effects. Advertising must not encourage irresponsible drinking. Another issue in media placement is whether media vendors will accept alcohol advertising. The decision to accept an individual ad or a category of advertising is always at the discretion of the owner or publisher of a media outlet.

In Malaysia, alcohol advertising on radio and televisions was outlawed in 1995 (Yahya, 2005). On Malaysian television, alcohol advertising is not shown before 10:00 pm and during Malay-language programs. However, non-Malay newspapers and magazines can continue alcohol advertising. Supermarkets and hypermarkets have also been criticized for advertising alcohol products on trolleys, which is controversial because Islam is the state religion of the country. After

the ban of alcohol advertising on Malaysian radio and televisions, they continued to build the brands with sponsorships of concerts and entertainment events.

In Singapore, alcohol advertisement is not allowed to be shown during programmes intended for children and young persons and during Malay-language programmes. In Indonesia, alcohol advertising was legal in the 1990s, but have since been completely banned. In Hong Kong, alcohol advertising is not allowed to be shown during Family Viewing Hour programmes. In the Philippines, alcohol advertising is allowed. Alcohol warning is also shown in the end of the advertisement explaining with the words: "Drink Moderately". On 1 January 2016, the warning was changed to "Drink Responsibly". In Thailand, alcohol advertisements are still allowed, but must accompanied by a warning message. In Sri Lanka, public advertising on alcohol is banned totally since 2006. In South Korea, public advertising on alcohol is only allowed after 10:00 pm.

In Russia, advertising alcohol products is banned from almost all media (including television and billboards) since January 2013. In Sweden, since 2010 advertisements are legal for wine and beer, but not on television and radio. Non-periodic magazines are allowed to advertise alcoholic beverages above 15%. In Finland, Parliament of Finland decided to ban alcohol outdoor advertising, except during sport events since January 2015. In the United Kingdom, the Advertising Standards Authority have banned several ads that don't comply with the restrictions in the EU directive. In Norway, advertising on alcohol is banned totally since 1975. In November 2019, Ireland introduced a law banning alcohol advertisements near schools, children play areas, public transportation, and cinemas, as well as restricting visibility of alcohol products in stores. There has been little progress in implementing comprehensive alcohol control strategies in Africa (Nasheeta Peer, 2017)

2.3.2. Regulation in Ethiopia: Banning Alcohol Advertisement on Media Outlets

The Food and Medicine Administration Proclamation No.1112 article 74(4) that bans advert of alcoholic products through TV, radio & billboard implemented on 29 May 2019. Details of the proclamation in relation to alcohol drinks labeling, advertising and promotion are presented as follow.

Article 55: Labeling of Alcohol Drinks

- 1) The label of every alcoholic drink prepared at a factory level and provided for public use shall contain its alcoholic volume and a warning that alcohol consumption may cause health problem and women should not drink alcohol drinks during pregnancy because of the risk of birth defect.
- 2) The label of every alcoholic drink prepared at a factory level with a volume of less than 10% shall contain the product's expiration date.

Article 60: Alcoholic drink advertising and promotion

- 1) Any advertisement of an alcoholic product shall contain a warning, as appropriate in writing or sound, that it is illegal to sell it to a person under the age of 18.
- 2) It shall be prohibited to directly or indirectly advertise alcoholic drinks in places of public gathering and sporting: street, condominium and other places by unreasonably decreasing the size of the warning.
- 3) Any manufacturer, importer or distributor alcoholic drinks whose volume is more than 10% shall not directly or indirectly sponsor public and government holiday, exhibition, sports event, school event and other related youth-centered events.
- 4) Advertising any alcoholic drink through board is prohibited. This restriction shall be applicable on any direct or indirect advertisement that connects a brand name, emblem, trademark, logo, organizational emblem, or any other distinctive feature of alcohol product with non-alcoholic products, services, or matters.
- 5) It shall be prohibited to advertise alcoholic drink by associating it with any lottery system or through billboard. Details shall be determined by regulation or directive issued to implement this proclamation.
- 6) Additional restriction regarding the time, place, and manner of alcohol advertisement and promotion may be determined by a regulation issued to implement this proclamation.

Article 74: Effective Date

- 1) This Proclamation shall enter into force on the date of publication in the Federal Negarit Gazette.
- 4) Notwithstanding to sub-article (I) of this article, article 55 of this proclamation requiring health warning on alcohol products shall come into effect after six months, and article 60 banning the advertisement of alcohol through broadcast and billboard shall come into effect after three months from the date of adoption of this proclamation the 5th day of February 2019.

2.4. Advertisements in Ethiopia: The Case of Alcohol Products

Advertising and trade promotion are important in the Ethiopian market. Government-owned mass media outlets (radio, television, and newspapers) and privately-owned magazines, satellite television stations, newspapers, radio stations and billboards are the major means of advertising. In Ethiopia, advertising in general is believed to have begun in the 19th century, during the reign of Emperor Menelik II. At the time, advertisements used to be announced at main squares and streets using the “Negarit”, a traditional war-drum (Neguessie and Berhane, 2012). Limited growth and advancement of the trade promotion and advertisement was witnessed during Emperor Haile Selassie time as well as the “Derg” regime. According to Negussie and Berhane (2012), the years from the mid-1970s to the early 1990s are characterized by severe restriction on any forms of advertising; except for a few government censored advertisements, consumer service advertising ceased to exist altogether. However, since the current regime the Ethiopian Peoples’ Revolutionary Democratic Front (EPRDF) took over the power from the “Derg” in 1991, advertising practices began to flourish significantly (EBA,2010). Nonetheless, this new era of deregulation and unchecked liberalization, heralded an unprecedented expansion of product advertising, including alcoholic beverages in the media, without developing socially responsible practices (Neguessie and Berhane, 2012). The main reasons for this were lack of a comprehensive advertising regulation and underdevelopment of the sector itself. In 2010, the Ethiopian Broadcast Authority (EBA) took the initiative to restructure advertising for general merchandise including regulations governing alcohol advertising and sponsorship in the media (EBA,2010). Since the advertising industry in Ethiopia was in its infant stage lacking seasoned professionals in the field, the entire focus of the regulations governing alcohol advertising revolved around avoiding messages that could be seen as encouraging excessive consumption, claiming health/therapeutic properties, social and sexual

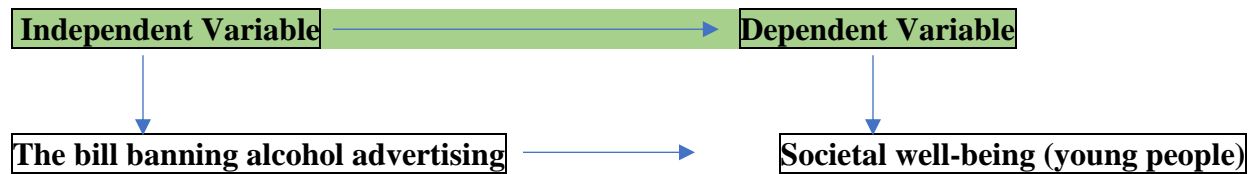
success, and remaining conscious at all times, of the age of characters depicted in advertisements and avoiding messages appealing to and aimed at minor (WHO-AFRO, 2010). There were only “some controls” on alcohol advertising in Ethiopia (WHO, 2004), to protect the young and vulnerable from unfair influences encouraging drinking alcohol. In recognition of this fact and to bridge the gap in the existing regulation, the Parliament of Ethiopia approved a bill, which bans alcohol promotion on broadcasting media outlets in February 2019.

2.5. Conceptual/Theoretical Framework of the Study:

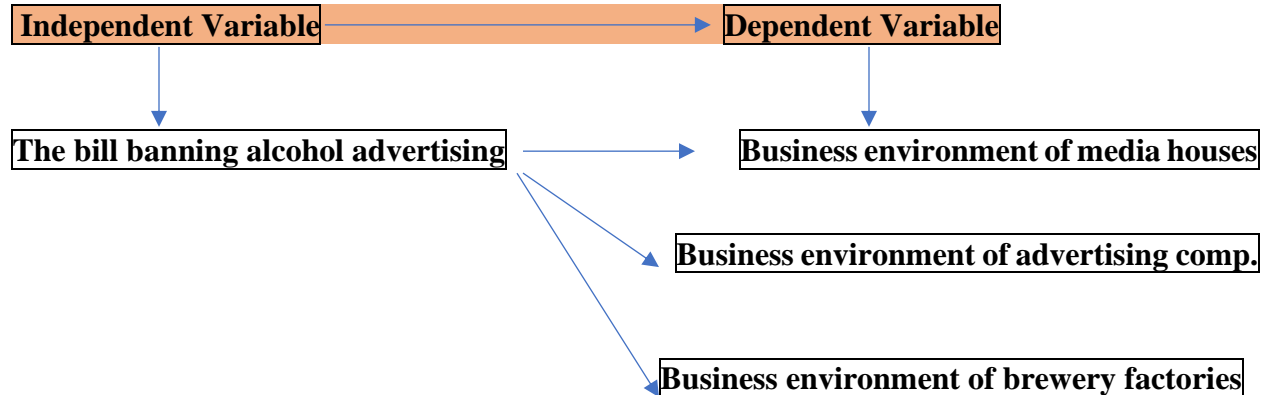
The conceptual/theoretical framework of the study is shown below.

The study has one independent variable and four dependent variables, which are of different nature.

Model 1:



Model 2



For model 1, it is assumed that the independent variable (the bill), will have a positive impact on the societal well-being.

For model 2, it is assumed that the independent variable (the bill), will have a negative impact on the business environment (profitability and competitiveness) of the media houses, advertising companies and brewery factories.

CHAPTER THREE

RESEARCH METHODOLOGY

This chapter discusses about the research methods used to conduct this study in a greater detail. It describes the study area, study population, research design, sampling technique, sample size, data collection methods and data analysis procedures as well as ethical consideration in undertaking this study.

3.1. Area of the Study

The focus area of this study is the city of Addis Ababa, Ethiopia. Addis Ababa is the capital of the country and metropolitan city where people with different ethnic, religious and cultural background who came from inside and outside of the country live together. The city is also where the headquarters and regional offices of international organizations such as the African Union (AU), UNECA, and various UN agencies are located, and it hosts more than 14 countries embassies and consulates. Moreover, the city is where the issues that this research study is trying to explore are predominantly observed. In addition, since the target groups of this study mainly media companies and brewery factories are based in the city, it would so much easier for the researcher to access the required data information.

3.2. Population of the Study

Best and Khan (1998) class the population as any group of individuals who have one or more characteristics in common that are of interest to the researcher. In this study, there are four groups of population targeted: broadcasting media which used to advertise alcoholic beverages; advertising companies which produced commercial adverts; brewery and other alcohol factories; and the general public (particularly the youth population) in Addis Ababa city.

3.3. Research Design

The research design of this study is mixed method, which comprises both qualitative and quantitative methods to answer the research questions. Creswell (2009) claims that there is more insight to be gained from the combination of both qualitative and quantitative than either of the forms by themselves, as their combined use provides an expanded understanding of research problems. As such, mixing qualitative and quantitative methods can provide a more comprehensive exploration for this study. By mixing both quantitative and qualitative research and

data, the researcher gains in breadth and depth of understanding and corroboration, while offsetting the weaknesses inherent to using each approach by itself (FoodRisC, 2016). One of the most advantageous characteristics of conducting mixed methods research is the possibility of triangulation, i.e., the use of several means (methods, data sources and researchers) to examine the same phenomenon. Triangulation allows one to identify aspects of a phenomenon more accurately by approaching it from different vantage points using different methods and techniques. Successful triangulation requires careful analysis of the type of information provided by each method, including its strengths and weaknesses.

3.3.1. Quantitative Method:

According to MacDonald & Headlam (2008) quantitative methods are research techniques that are used to gather quantitative data, data that can be sorted, classified, measured. According to Creswell, (1994) quantitative research is useful to quantify opinions, attitudes and behaviors and find out how the whole population feels about certain issues. In this study, the quantitative method was used to collect quantitative data using structured survey questionnaires, which was administered to randomly selected members of the urban youth community, particularly to youth in Addis Ababa.

3.3.2. Qualitative Method:

Qualitative methods generally explore the social dimensions of the study, which are difficult to quantify for measurement. Qualitative methods provide results that are usually rich and detailed, offering ideas and concepts to inform your research as it helps to understand how people feel and what they think, but not how many of the target population feel or think that way as quantitative methods do (MacDonald S & Nicola H., 2008). Among various tools used under qualitative methods, for this study key informant interview (KII) and observation was employed to gather primary data from target respondents or data source.

3.3.2.1. Key Informant Interviews (KII)

Key informant interview (KII) is a qualitative in-depth interview with the right people who know have firsthand information and knowledge about an issue to be discussed. According to USAID, Key informant interviews are "qualitative, in-depth interviews of 15 to 35 people selected for their first-hand knowledge about a topic of interest. The interviews are loosely structured, relying on a list of issues to be discussed. Key informant interviews resemble a conversation among acquaintances, allowing a free flow of ideas and information. Interviewers frame questions

spontaneously, probe for information and take notes, which are elaborated on later" (USAID 1996).

For this study, structured key informant interview (KII) guides were developed to collect data from selected private and public media companies, advertising companies, and brewery factories. The researcher has identified the most appropriate and relevant personnel in each institution and hold a face-to-face interview using structured interview guide developed specifically for this study purpose.

3.3.2.2. Observation

Observation is commonly used in social sciences researches as a qualitative method for collecting data about actual behavior of people and events happening in a real time. Observation is the systematic description of the events, behaviors, and artifacts of a social setting (Marshall & Rossman, 1989, p. 79). As part of data gathering for this study, the researcher observed the current situation of alcohol consumption by randomly visiting few bars and restaurants in Addis Ababa. The purpose of this technique is to understand how the drinking behavior of the public, particularly of the youth as well as their number has been influenced due to the banning of alcohol advertisement. The researcher used a simple checklist to capture what she has observed in each place she visited.

3.4. Sampling techniques, procedures and data sources

3.4.1. Sampling techniques for youth population in Addis Ababa

The site selected to undertake this study was urban area, particularly the area under Addis Ababa City Administration. The selection of the study area (i.e. Addis Ababa) is purposeful given significant prevalence of the problem that this study has focused on. However, to ensure unbiased representation of the study population, random sampling techniques was used to select a representative sample of the public (youth & adults).

To determine the sample size for the public survey to get the opinion and perception of the society on alcohol consumption and the bill, the researcher used the formula below which is commonly used for a larger population:

$$s = \frac{x^2 NP(1 - P)}{d^2(N - 1) + x^2 P(1 - P)}$$

Where:

s=required sample size

x^2 = the table value of chi-square for 1 degree of freedom at the desired confidence level (3.841)

N = the population size of youth population of Addis Ababa = 700,000 according to UNFPA, 2017

P = the population proportion (assumed to be 0.5 since this would provide the maximum size).

d = margin of error (0.07). In literatures, it is recommended to use the margin of error within the range of 4% to 8% for the public opinion surveys such as polls. For this study, the researcher chose 7% margin of error to get an optimal sample size that can be managed given COVID situation in the country.

Therefore, based on the above formula, the sample size estimated was 196. However, the researcher was able to interview and collect data from 187 random respondents in Addis Ababa with a response rate of 94%. Structured survey questionnaire was used to collect the survey data.

3.4.2. Sampling techniques for brewery factories

Currently, there are six main brewers that together own 12 breweries producing at least 24 different brands of beers in the country. Out of the total 12 breweries, six (50%) were selected randomly for this study. However, due to unwillingness of some of the factories couple with difficulties posed by COVID-19 only one brewery factory was covered by this study.

3.4.3. Sampling techniques for media companies

In Ethiopia, there are six main television stations out of which 3 are state-owned or pro-government and the remaining three are private. For this study two TV stations are chosen to represent media companies: one from each category (State/private).

3.4.4. Sampling techniques for advertising companies

As of January 2020, there are over 30 advertising companies in Ethiopia, from which 15 companies (50%) were planned to be selected randomly for this study.

Table 1: Research Design Matrix

Research questions	Study method	Data collection tool	Data source
(i) What are the effects of the bill on the brewery factories and media and advertising companies' business environment over the past one year?	Quantitative	Structured checklist	Secondary data (production, profit, HR...) in brewery factories and media and advertising companies.
	Qualitative	Structured Key Informant Interview (KII) Guides	Key personnel in selected brewery factories, media and advertising companies
(ii) How has the bill influenced the perception of the public towards alcohol consumption?	Quantitative	Structured public survey questionnaire	Sample representative of the urban youth community (youth and adults)
(iii) What lessons can be drawn to enhance the role of a media to induce positive influence on the society, particularly youth community in Ethiopia?	Qualitative	Structured Key Informant Interview (KII) Guides	Key personnel in selected media and advertisement companies

3.5.Data Collection

The researcher together with four data collectors (enumerators) were responsible for the entire data collection and verification at field level. The researcher was fully responsible for conducting all key informant interviews (KIIs) with key personnel at the selected brewery factories, media and advertising companies. Whereas, the data collectors conducted one-on-one interviews and collect data from randomly selected youth and adults.

3.6.Data Analysis Techniques

The primary and secondary data (both quantitative and qualitative) collected through the different tools of the study from different sources were coded, entered into data analysis software and then cleaned. The data was checked for its accuracy and examined for its consistency and completeness before the analysis. The survey data, which is a quantitative data was encoded and analyzed using the Statistical Package for Social Studies (SPSS). Whereas, the qualitative data and information gathered through key informant interviews (KII) went through a thematic analysis using qualitative data analysis techniques. The results from the two data sets were triangulated to complement each other.

3.7. Ethical Consideration

The researcher ensured the consent of the research participant before starting data collection. The respondents were informed that the aim of the study was for academic purposes and that the required permission was granted by the university to undertake this research. The respondents were also informed that they are not forced to participate in the study rather they volunteered to do so.

CHAPTER IV

DATA ANALYSIS AND DISCUSSION

Chapter four presents the major findings of the study and discusses the findings in line with the specific objectives stated in chapter one. It first shows the profile of the urban community members and the companies (advertising, brewery and media companies) then analyse and interpret the data collected to answer the research questions of the study.

4.1 Response Rate

For this study, a total of 196 (one hundred ninety-six) public survey respondents were planned to be interviewed, out of this 187 (one hundred eighty-seven) were interviewed giving an estimate of 95% response rate. In addition, the structured key informant interview guide/checklist with both qualitative and quantitative questions were distributed for two media companies (TV stations), six brewery factories, and fifteen advertising companies. The two TV stations have fully cooperated and provided the data for the study with a response rate of 100%. Due to various reasons, only one brewery factory and two advertising companies were cooperative and provided the required data, which made the response rate of 17% and 13%, respectively.

Table 2: Response rate of the study

Data Collection Tools	Planed sample size in number	Actual sample size (no. of respondents)	Response Rate
1. Public Survey Questionnaire	196	187	95%
2. KII for Media Companies (TV)	2	2	100%
3. KII for Advertising Companies	15	2	13%
4. KII for Brewery Factories	6	1	17%

Source: Own Survey Data, 2020

Therefore, the analysis of this study is based on the abovementioned response rate for each tool used for data collection. As it was clearly mentioned in the methodology section, the data was analyzed using descriptive statistics particularly frequency and percentage.

4.2 Descriptive Analysis and Discussion of the Public Survey Data

4.2.1. Demographic characteristics of the sample respondents

Demographic characteristics that were considered to profile the sample respondents of the public survey for this study were age, sex, education level and occupation.

4.2.1.1. Gender and Age.

A total of 187 people was interviewed to obtain their opinion and feedback on consumption of alcohol in the community of Addis Ababa. Out of the total respondents, about 67% were male and the remaining 33% were female.

The age of the respondents was grouped into eight categories. The highest proportion of respondents were found in the two age categories “21-25” and “26-30” with a total percentage of 18% and 17%, respectively. The lowest percentage (3%) was registered in the “above 50” age category (please refer figure 1). Exactly half of the respondents (50%) were under the age of 30 years. This indicate that the youth population is well represented in this study. With regards to female respondents, the highest percent (8%) was found each in “under 21” and “36-40” age categories.

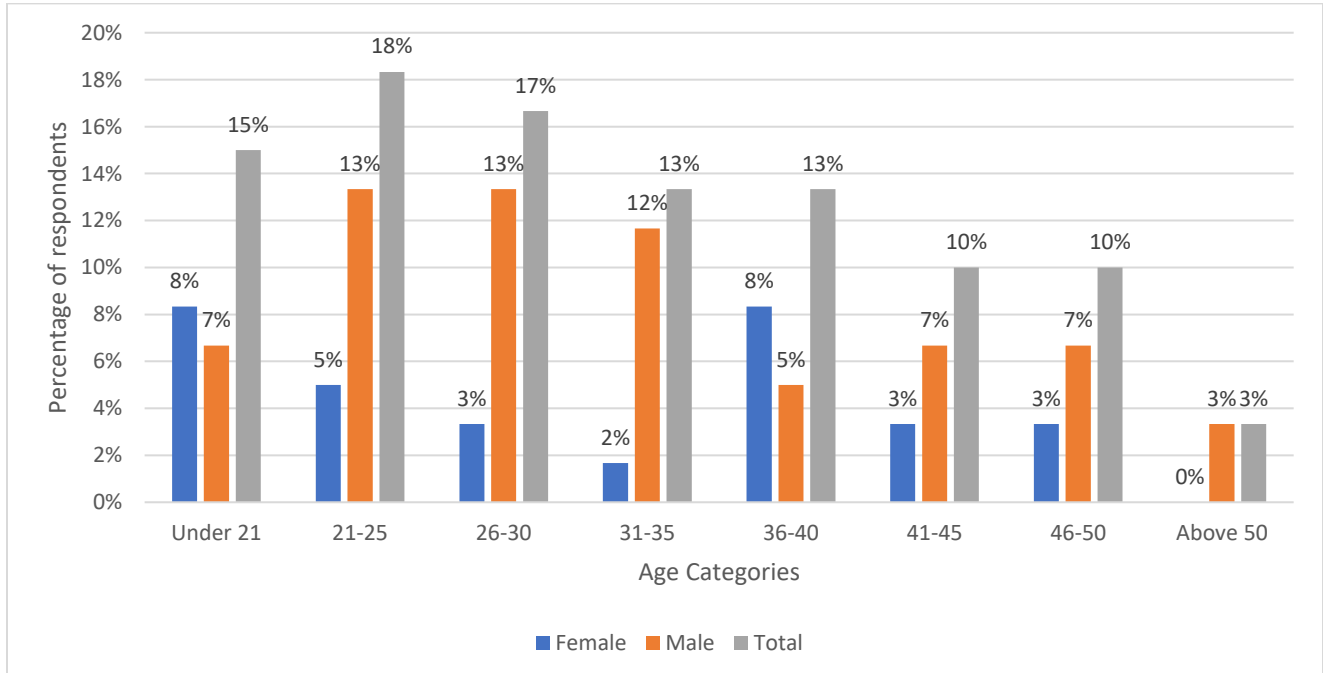


Figure 1: Percentage of respondents by age categories and gender (source: own survey data,2020)

4.2.1.2. Marital Status

Most of the respondents (55%) were single while 38% were married and the remaining 7% were separated or divorced. Table 3.

Table 3: Marital status of the respondents by gender

Gender of the respondents	Single		Married		Separated		Total	
	N	%	N	%	N	%	N	%
Female	34	18%	25	13%	3	2%	62	33%
Male	69	37%	47	25%	9	5%	125	67%
Total	103	55%	72	38%	12	7%	187	100%

Source: Own Survey Data (2020)

4.2.1.3. Education Qualification and Occupation

The education qualification (educational status) and occupation (employment status) of the respondents are described in Table 4 below. The education qualification level of the 60% (which is the majority) of the respondents was College Diploma or Degree and 25% were postgraduate degree and above holders. The remaining 15% have not yet completed secondary school.

Table 4: Education qualification and employment status of the respondents by gender

Gender of the respondents	Education Qualification (%)				Occupation (%)		
	Secondary School & Below	Collage Diploma/ Degree	Postgraduate and above	Student	Businessperson/ Self-employed	Employee	Unemployed
Female	5%	27%	2%	3%	8%	20%	2%
Male	10%	33%	23%	12%	15%	35%	5%
Total	15%	60%	25%	15%	23%	55%	7%

Source: Own Survey Data (2020)

In terms of occupation or employment status, the majority of the respondents (55%) were employees in different organizations whereas 23% were businesspersons who identified themselves as self-employed. Fifteen percent were students and the remaining 7% were unemployed.

4.2.2. Alcohol drinking practice of the society

One of the objectives of this study was to understand the perception and opinion of the public in the study area (Addis Ababa) towards alcohol consumption in general and the drinking practice since the bill implemented. In line with this objective, the respondents were asked whether they drink alcohol, if so, how often? and if their alcohol consumption increased, decreased or remained

the same over the past one year and the reasons for these changes. Out of the total respondents, the vast majority (73%) have reported that they drink alcohol. There was a big difference between male and female respondents. Fifty seven percent were male and 17% were female (Table 4)

Table 5: Alcohol drinking by gender

Gender	Do you drink alcohol?			
	Yes		No	
	N	%	N	%
Female	31	17%	31	17%
Male	106	57%	19	10%
Total	137	73%	50	27%

Figure two below depicts the distribution of all 137 alcohol drinking respondents across the eight age categories. The highest number (31) and percentage (23%) of respondents who drink alcohol was found in the age range of 21 to 25 years. The second highest number (25) and percentage

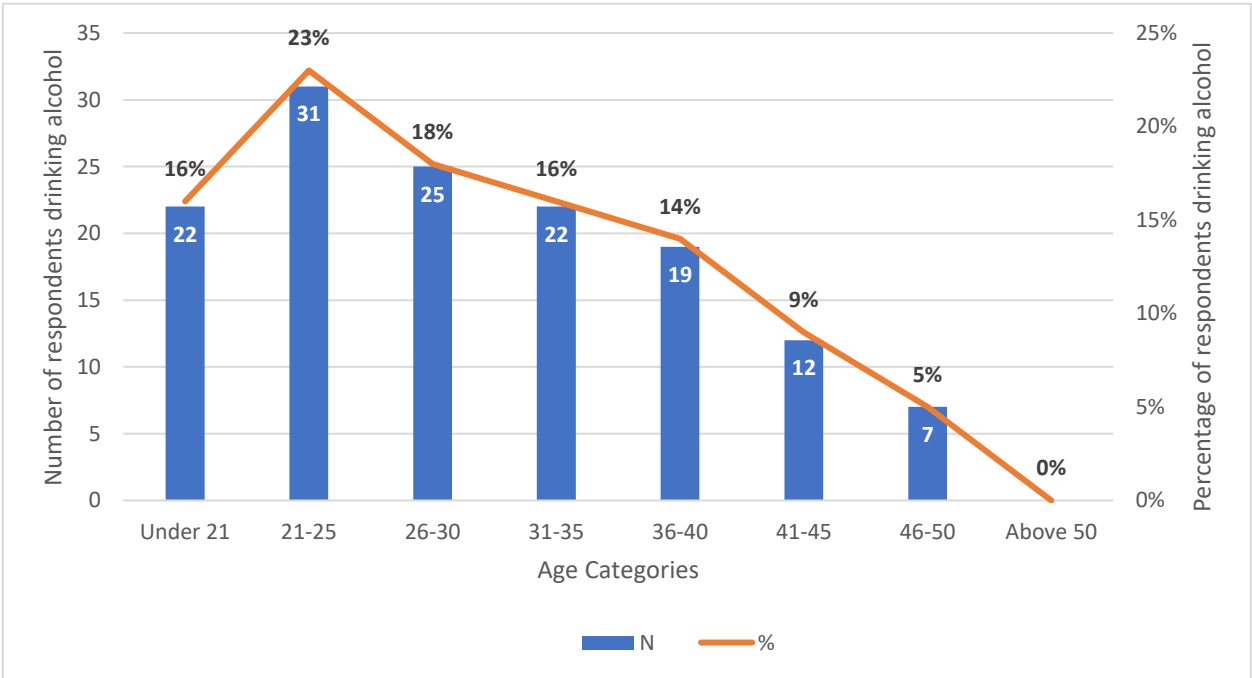


Figure 2: Percentage and number of respondents drinking alcohol in different age groups. Source: Own Survey Data (2020)

(18%) was in the “26-30” age category. In general, close to 60% of the total respondents who drink alcohol are under the age of 30. This indicates that the young population has more tendency to drink alcohol than the older ones. As our data shows above in Figure 2, as the age of the respondents increase upwards from 25 years the percentage of alcohol drinkers decreases and reaches zero at the age of 50 years.

In terms of frequency of drinking, the study asked a follow up question “If yes, how often do you drink?” those respondents who reported that they drink alcohol. The vast majority i.e. 71% drink alcohol at least once in a week and out of this 96(41%) said that they drink every weekend, which implies the practice of drinking alcohol more than once a week for significant percentage of the sample respondents. However, only a few, not more than 6 (5%) respondents reported that they drink alcohol every day.

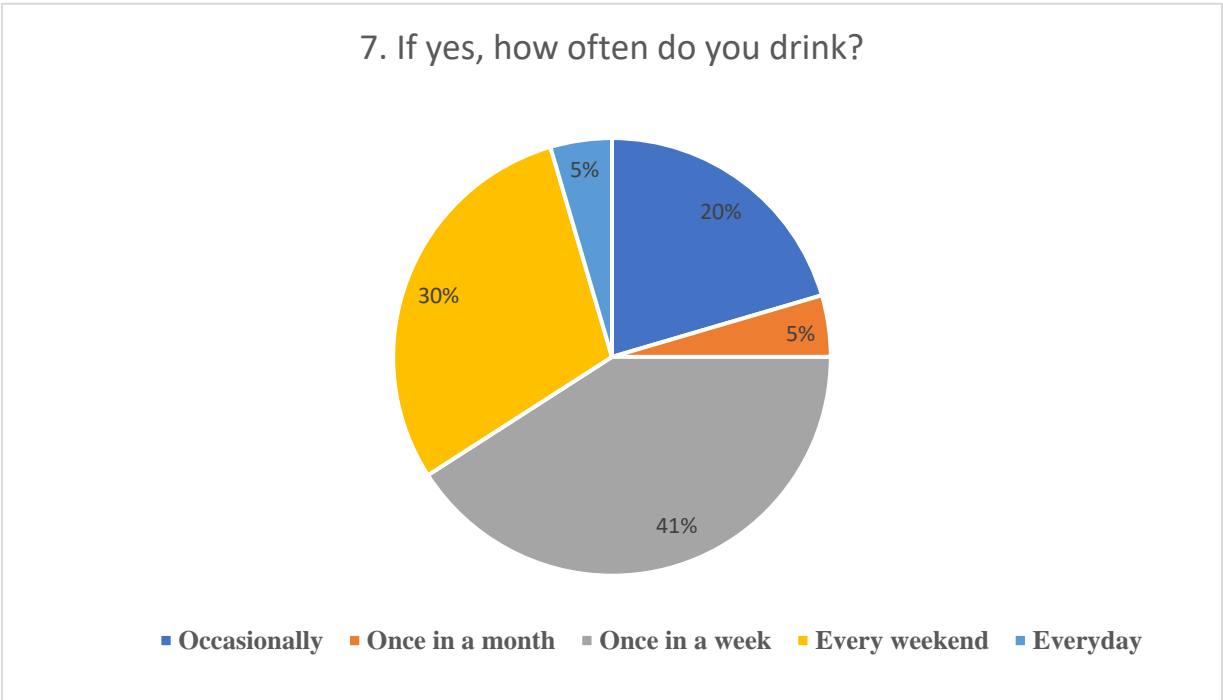


Figure 3: Frequency of drinking alcohol

Nevertheless, alcohol drinking practice of the majority decreased (70%) over the past one years. And, the practice remained the same for 25% and increased only for 5% during the same period.

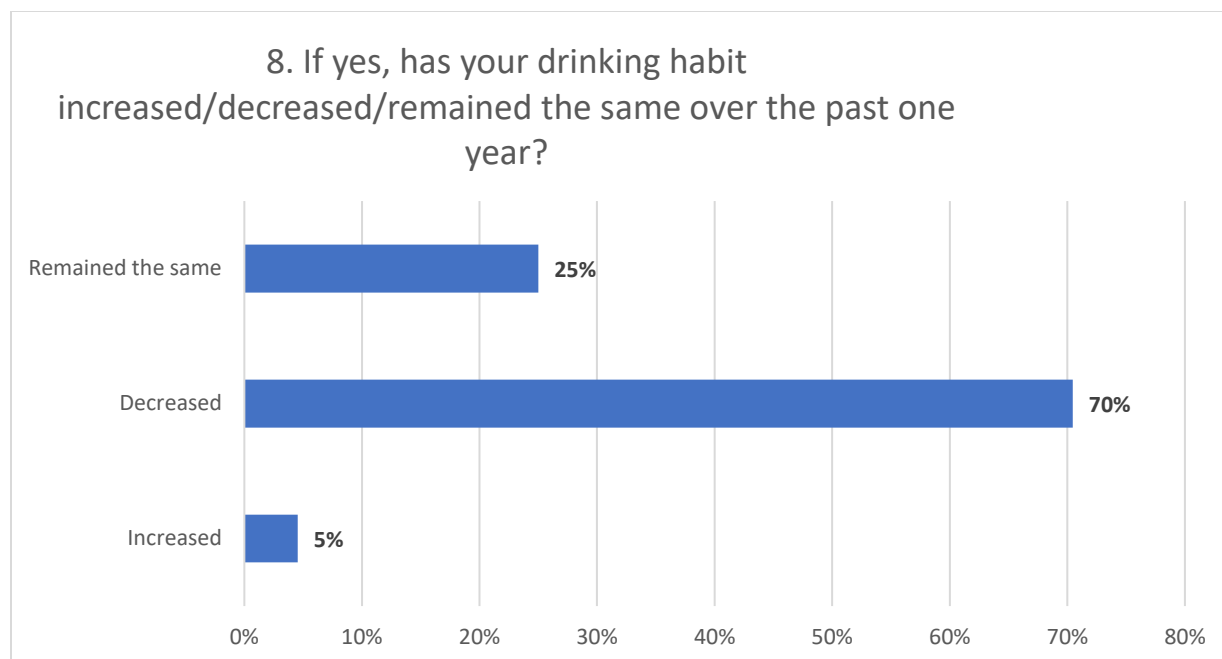


Figure 4: Change in alcohol drinking practice among the public.

Among others, the main reasons for the “decreased” and or “remain the same” habit of drinking alcohol over the past one year were doctors’ advice or health related conditions, lack of money or decreased income, increased price of alcohol and increased awareness respectively for 48%, 38%, 33% and 31% respondents. On the other hand, increased income and desire to relax with friends were equally the two important reasons for increased drinking habit during the last one year. Please refer Table 5 for more details.

Table 6: Reasons for decreased/increased/remained the same

	Reasons for "Decreased" and "Remain the same"							Reasons for "Increased"	
	Doctor's advice or health condition	COVID_19	Lack of money or decreased income	Increased awareness on alcohol negative effects	Increased price of alcohol	Life has remained the same /nothing changed	Personal reason	Increased income	Desire to relax with friends/peer influence
Frequency	62	9	50	41	44	22	3	3	3
Percentage	48%	7%	38%	31%	33%	17%	2%	50%	50%

Source: Own Survey Data (2020)

4.2.3. Impacts of the bill on alcohol drinking behaviors of the society

4.2.3.1. Public awareness on banning alcohol advertising on media outlets

The primary focus and objective of this study is to understand the positive and negative impacts of banning alcohol advertising on various stakeholders. A bill that bans alcohol advertising on major media outlets was passed by the Ethiopian Parliament in 2019. This study was interested how much has the public is aware of the bill. According to the public survey, 109 (58%) of the respondents have reported that they are aware of the bill. The remaining 42% of the total respondents have no idea about the bill.

Table 7: Public awareness about the bill that bans alcohol advertising on media outlets.

Response	Are you aware of the bill passed by the Ethiopian Parliament in 2019 which bans alcohol promotion on broadcasting media outlets? Yes /No	
	Number	Percent
Yes	109	58%
No	78	42%

Source: Own Survey Data (2020)

4.2.3.2. Alcohol consumption and alcohol related violence in a family, neighborhood & the city of Addis Ababa over the past one year

In order to explore the impacts of the banning alcohol advertising on media on the society, the researcher framed seven statements and solicited the respondents to indicate their rating (level of agreement) for each statement on the scale of 1 (strongly disagree) to 5 (strongly agree). If a respondent finds a statement irrelevant to his/her circumstances, he/she was given the option to select “Not applicable”. The first three statements or questions ask if there was an increase in the number of alcohol drinkers in a respondent family, neighbourhood, and the city of Addis Ababa during the past one year. The second three questions ask if there was an increase in alcohol induced violence in a respondent family, neighbourhood/village, and the city of Addis Ababa over the past one year. The final statement/question captured the overall opinion and perception of the respondents on the positive effects of banning alcohol advertising on the behaviours of the youth in a community.

Table 8: Alcohol consumption and alcohol related violence in a family, neighborhood and the city of Addis Ababa over the past one year.

Item	Strongly disagree		Disagree		Neutral		Agree		Strongly Agree		Not Applicable	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Number of people drinking alcoholic beverage increased in your family over the past one year (February 2019 - February 2020).	75	40%	94	50%	0	0%	6	3%	9	5%	3	2%
Number of people drinking alcoholic beverage increased in your village/neighborhood over the past one year (February 2019 -February 2020).	65	35%	84	45%	4	7%	19	10%	3	2%	3	2%
Number of people drinking alcoholic beverage increased in the city over the past one year (February 2019 - February 2020).	50	27%	78	42%	34	18%	19	10%	6	3%	0	0%
Alcohols induced violence increased in your family over the past one year (February 2019 -February 2020).	81	43%	90	48%	0	0%	9	5%	3	2%	3	2%
Alcohols induced violence increased in your village/neighborhood over the past one year (February 2019 -February 2020).	50	27%	90	48%	19	10%	25	13%	0	0%	3	2%
Alcohol induced violence increased in the city over the past one year (February 2019 -February 2020).	19	10%	90	48%	47	25%	31	17%	0	0%	0	0%
In general, banning alcohol advertisement on broadcasting media outlets positively affected behaviors of youth in your community.	3	2%	3	2%	53	28%	112	60%	16	8%	0	0%

Source: Owe Survey Data (2020)

The findings of the data with regards to the seven statements on alcohol consumption and alcohol related violence in a family, neighbourhood and the city of Addis Ababa over the past one year are presented above in Table 8. For the statement “Number of people drinking alcoholic beverage increased in your family over the past one year (February 2019 -February 2020)”, 75 (40%) of the respondents strongly disagree, 94(50%) of the respondent disagree, and in total only 15 (8%) of the respondents indicated that they either agree or strongly agree with the statement. Therefore, the vast majority of the respondents 169 (90%) were not in favour of the statement that the number of people drinking alcoholic beverage increased in their family over the past one year.

For the statement “Number of people drinking alcoholic beverage increased in your village/neighbourhood over the past one year (February 2019 -February 2020)”, 65(35%) of the respondents strongly disagreed, 84(45%) of the respondents disagreed, 4 (7%) of the respondents were neutral (neither agree nor disagree), and only 22(12%) of the respondents either agreed or strongly agreed. Similarly, most of the respondents 149 (80%) do not believe that the number of people drinking alcoholic beverage increased in their village/neighbourhood during the past one year.

For the statement “Number of people drinking alcoholic beverage increased in the city over the past one year (February 2019 -February 2020)”, 50(27%) of the respondents strongly disagree, 78(42%) of the respondents disagreed, 34(18%) of the respondents disagree, 19 (10%) were neutral, and only 6 (3%) respondents agreed. According to the public opinion, the number of people drinking alcoholic beverage has not increased in the city of Addis Ababa over the past one year.

The research further explored if there were a change in alcohol induced violence in a family, village/neighbourhood, and in Addis Ababa city during the past one year. When the respondents asked if there were increase in alcohol induced violence in their family from February 2019 to February 2020, 81 (43%) strongly disagreed, 90(48%) disagreed, and 9 (5%) agreed, and only 3(2%) strongly agreed.

Likewise for the statement “Alcohols induced violence increased in your village/neighbourhood over the past one year (February 2019 -February 2020)”, 50 (27%) of the respondents strongly disagreed, 90(48%) of the respondents disagreed, 19(10%) of the respondents were neutral, and only 25(13%) of the respondents agreed.

With regards to increase in the alcohol induced violence in Addis Ababa city over the past one year, 19(10%) of the respondents strongly disagreed, 90(48%) of the respondents disagreed, 47(25%) of the respondents were neutral (neither agreed nor disagreed), and 31 (17%) of the respondents agreed that the number increased.

For the statement “In general, banning alcohol advertisement on broadcasting media outlets positively affected behaviour of youth in your community”, 112(60%) of the respondents agreed, 16 (8%) of them have strongly agreed, and only less than 5% of the respondents either disagreed or strongly disagreed. The remaining 53 (28%) of the respondents were not sure if the banning of alcohol advertising on broadcasting media outlets has affected the behaviour of the youth community.

4.3 Quantitative and qualitative analysis of the data from the broadcasting media houses

4.3.1. Profile of broadcasting media houses (TV stations)

To explore and understand the impacts of banning alcohol advertising on media outlets, particularly on TV stations, the study has collected both quantitative and qualitative data from two well-known media houses: Fana Broadcasting Corporate (FBC) and Ethiopian Broadcasting Services (EBS). The overall profile of these two media houses is presented below in Table 9.

Table 9: Company Profile of FBC and EBS

Name of TV	Ownership	No. of operational years in Ethiopia	Number of employees			Estimated audience number in Ethiopia
			Male	Female	Total	
Fana Broadcasting Corporate (FBC)-TV	Private	>25 years	717	315	1032	~70million (for both TV and Radio)
Ethiopian Broadcasting Services (EBS)-TV	Private	12 years	115	88	203	NA

The two media houses are privately owned, however, FBC is has been operational in Ethiopia for longer period, i.e. over 25 years recently reached an estimated number of audiences of over 70 million for both TV and Radio services. EBS-TV has operated in Ethiopia for about 12 years.

4.3.2. The effects of the bill on business environment over the past one year-Quantitative Findings

With the aim to identify the effects of the bill banning alcohol advertising on the two media houses business operating environment since its implementation, the researcher held an in-depth interview with the key personnel in both institutions using structured key informant interview guide. In addition, the researcher has also gathered quantitative data (secondary data) of five years from the two houses on number of viewers, advertising cost, total number of employees to examine the trend and identify if there is any change since the bill was passed in early 2019.

4.3.2.1. Effects on the number of viewers/audiences

The average estimated number of viewers of the FBC increased from 70.6 million in 2015 to about 78.5 million in 2019. The number of viewers/audiences of the FBC has increased with annual average growth rate of 3%. From this we can understand that the banning of alcohol advertising has no effect on the number of viewers for the FBC. However, due to unavailability of data from the EBS-TV, the researcher couldn't identify the effect of banning alcohol advertising on the number of viewers.

Table 10: Average number of viewers of the media houses by years.

Media Houses	Average estimated number of viewers of the media-TV in Ethiopia				
	2019	2018	2017	2016	2015
FBC-TV	78.48million	76.454million	74.48 million	72.580 million	70.6 million
EBS-TV	N/A	N/A	N/A	N/A	N/A

Source: FBC, 2010 & EBS, 2020

4.3.2.2. Effects on the advertising cost

It was assumed that the banning of alcohol advertising would have a direct effect, presumably a negative effect on the average advertising cost of the TV channels for different times of broadcasting. However, the data from the two media houses indicate that there was no direct effect on the average advertising price for both prime time as well as normal broadcasting times.

The annual average advertising cost for EBS-TV has been constant for both prime and normal broadcasting times since 2017.

Table 11: Average advertising cost on FBC and EBS TVs over the years

Time	Average advertising cost on FBC and EBS TV									
	2019		2018		2017		2016		2015	
Prime Time	FBC	EBS*	FBC	EBS	FBC	EBS	FBC	EBS	FBC	EBS
30 sec	7620	13128	NA	13128	NA	13128	NA	8862	NA	NA
45 sec	11430	16478	NA	16478	NA	16478	NA	12579	NA	NA
60 sec	15240	18689	NA	18689	NA	18689	NA	14690	NA	NA
Normal Time	FBC	EBS	FBC	EBS	FBC	EBS	FBC	EBS	FBC	EBS
30 sec	6,870	7,678	NA	7,678	NA	7,678	NA	6279	NA	NA
45 sec	10,305	10,978	NA	10,978	NA	10,978	NA	8400	NA	NA
60 sec	13,740	13,178	NA	13,178	NA	13,178	NA	9639	NA	NA

Source: FBC, 2020 and EBS, 2020

4.3.2.3. Effects on the labor force

This study investigated the effects of banning alcohol advertising on the labor force of the two media houses. It has gathered human resources data of the four years and examined the trend over those years. As such, the total number of employees of both FBC and EBS were 845 in 2016. With the average annual growth rate of 13%, the total number of employees of FBC and EBS reached 1,179 in 2019. Please refer Table 12.

Table 12: Total number of employees in FBC and EBS-TV over four years

Media Houses	Total number of employees of the company over the years											
	2019			2018			2017			2016		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
FBC	687	300	987	500	469	969	504	477	981	513	235	748
EBS	114	78	192	93	69	162	69	54	123	54	43	97
Total	801	378	1179	593	538	1131	573	531	1104	567	278	845

Source: EBS, 2020 and FBC, 2020

Based on the data in Table 12, the researcher computed the average annual growth rate (3%), which is mentioned above and the annual growth rate for each year for both media houses as presented below in Figure 5. FBC had the highest annual growth rate of 31% in 2017 and sharply descended

to -1% in one year in 2018. However, it had rebounded and gained 2% annual growth rate in the subsequent year 2019 during which the bill was passed by the Parliament and implemented. The EBS-TV has more or less a steady annual growth rate of the labor force as compared to the oscillating rate of the FBC. The highest annual growth rate of 32% was registered in 2018 for EBS. The rate has decreased to 19% in 2019. The labor force of the EBS increased from 162 in 2018 to 192 in 2019, but at a decreasing annual growth rate. As such, the impacts of the bill on the labor force of both the FBC and EBS are hardly noticeable as no substantial change was seen in the data that can be attributed to the bill's effect.

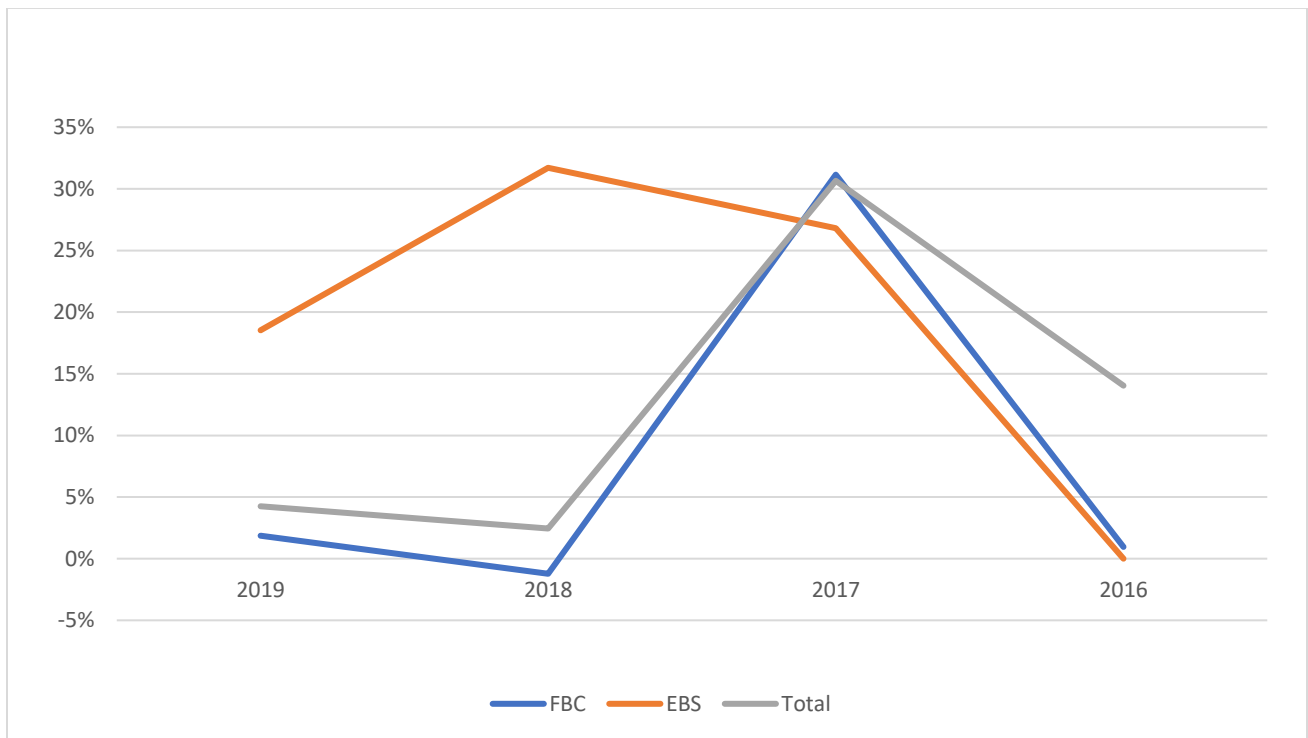


Figure 5: Annual Growth Rate of the FBC and EBS Labour Force (Author's Computation)

4.3.3. Qualitative research findings on the impacts of the bill on media houses business environment

In order to complement the quantitative data and findings, the researcher conducted an in-depth key informant interview with the relevant personnel in both FBC and EBS to gather qualitative information to comprehensively answer the research questions. Guided by the structured interview tool, the researcher asked the representatives of both institutions “what were the five major businesses industries (types of business sectors; such as banking, insurance, hotels, brewery, etc),

which advertise their products/services using your media (TV) before and after the bill that bans alcoholic advertising on media outlets was passed in February 2019?”.

KII-I, Media & Community Research Officer at Fana Broadcasting Corporate, interviewed on 3 June 2020, at 2:30 PM replied to the question as

“Prior to the implementation of the bill, financial institutions such as banks and insurances, government’s service sector institutions such as Tele and EELPA, brewery factories, domestic products manufacturing companies, and importer organizations were the five major clients. After the implementation of the bill in 2019, the brewery factories were withdrawn and their third level position/rank in terms of advertising market share was taken by non-alcoholic beverages producing companies such as soft drinks, mineral waters and juices”

KII-II, Senior Business Development Specialist at Ethiopian Broadcasting Service (EBS TV), interviewed on 5 June 2020 at 9:00 AM response to the same question was

“For EBS, there were three major business clients who used to advertise their products or services on our media before 2019 (before the ban implemented). Breweries were the first, followed by banks and FMCG (Fast Moving Consumer Goods) as the second and third clients. When the bill was passed by the Parliament and implemented in 2019, our engagement with breweries was ended and our top three major clients rank was changed. Since then, the banks have taken the first spot followed by FMCG. Furnitures and housewares took the third position.”

The researcher further asked the key informants of the both media houses to discuss the major impacts of the bill banning advertising alcoholic beverage on media outlets on their company’s overall business environment (competitiveness and profitability). According to KII-I,

“The bill has affected the company’s annual revenue plan, reduced the FBC’s local advertisement share, and reduced the purchasing power of media technologies, goods and manpower”

The response of KII-II for the same question was quite astonishing as she meticulously described the key impact of the bill on the EBS-TV. She said,

“Since the bill implemented, the competitiveness and profitability of our media has been significantly affected. According to our internal assessment finding recently conducted, the overall revenue of our company has decreased by over 30%”

The researcher followed up further and asked the key informants if there were some measures taken by their respective organizations to mitigate the impacts/effects of the bill on the business environment? KII-I answered this question as

“Primarily, FBC had conducted market gap analysis survey prior to the bill enactment in order to mitigate the risk and bridge the gap (competitiveness and profitability gap) that might be created due to the bill. Accordingly, FBC has found our alternative business sectors such as real estates and non-alcoholic drinks which are locally produced but not yet engrossed”

For EBS, KII-II response was that

“To mitigate the obvious negative impacts of the bill on the media house, EBS increased the capacity of its sales team, shifted its attention to other business such as small and medium scale companies”

Finally, the researcher asked if they have identified any gap in the bill, which needs to be addressed or amended. Both FBC and EBS have indicated that it has no problem with the bill and has not found any gap in the bill. Rather, they emphasised on the importance of the bill to ensure the overall well-being of the public in the long run.

4.4 Quantitative and qualitative analysis of the data from the advertising companies

4.4.1. Profile of the advertising companies

A total of 15 advertising companies were planned to be covered by this study. However, the researcher was able to collect data only from two advertising companies since many advertising companies' offices were closed due COVID-19. Cactus Ethiopia is one of the oldest advertising company in Ethiopia with over 20 years of experiences and current total number of employees 45. Sabisa Films has been operational for over 10 years in Ethiopia and has a total of 12 employees.

Table 13: Profile of the advertising companies

Name of Advertising Company	Ownership	No. of operational years in Ethiopia	Number of employees		
			Male	Female	Total
CACTUS Ethiopia	Private	20	27	18	45
Sabisa Films	Private	10	4	8	12

Source: Cactus, 2020 & Sabisa, 2020.

4.4.2. The effects of the bill on business environment over the past one year-Quantitative Findings

4.4.2.1. Effects on advertising production cost

In order to understand the effects of the bill on business environment of the advertising sector, the researcher collected the average cost of advertisement production from the two companies and the data is presented below in Table 14. In 2015, the average advertising production cost for 30 second, 45 second, and 60 second was 3000, 4000, and 5000 birr respectively. The average cost increased to 5000, 6100, and 7000 for the respective time slots of 30 second, 45 second, and 60 second in 2019.

Table 14: Advertisement production cost for media broadcasting over the years.

Year	Average advertisement production cost for 30sec, 45sec and 60 sec in ETB		
	30 sec	45 sec	60 sec
2019	5000	6100	7000
2018	5000	6100	7000
2017	3000	4000	5000
2016	3000	4000	5000
2015	3000	4000	5000

Source: Author's Computation

4.4.2.2. Effects on the labor force of the advertising companies

In the advertising sector, the labor force has been decreasing at an average annual growth rate of -5% over the past five years. The average annual number of employees in both companies were 51 and declined to 41 in 2019.

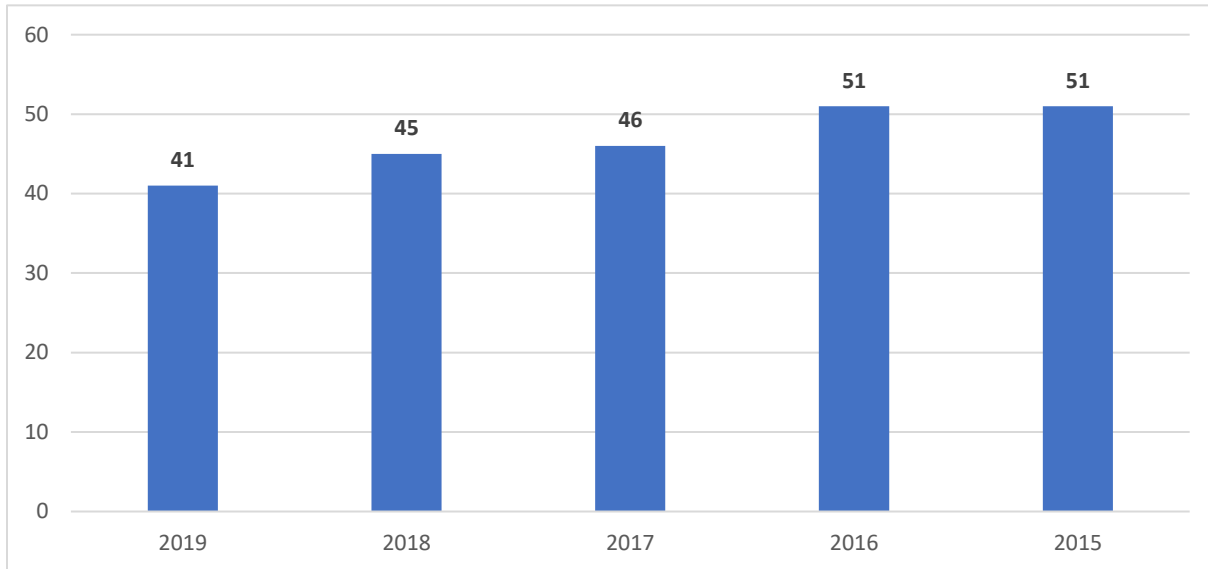


Figure 6: Average annual number of employees in two advertising companies

4.4.3. Qualitative research findings on the impacts of the bill on advertising companies

In order to complement the quantitative data and findings, the researcher conducted an in-depth interview with the key personnel in both Cactus and Sabisa to gather qualitative information to comprehensively answer the research questions. Guided by the structured key informant interview tool, the researcher asked the representatives of both companies “What were the five major businesses industries (types of business sectors; such as banking, insurance, hotels, brewery, etc), which worked with your company to advertise their products/services before the bill that bans alcoholic beverage on media outlets was passed in February 2019?”.

Mr. KII-III, HR and Administration Manager at Cactus PLC, interviewed on 1 June 2020 at 3:00 PM replied to the question as

“Breweries, Home Care (powder soap), Personal Care (toothpaste), Family Care (DKT), and Entertainment (DSTV) were the five major clients of Cactus before the bill was passed. Over the past one year, since the implementation of the bill, clients of Cactus remained the same except breweries, which are no longer our clients due to the bill”

Mr. KII-IV, CEO at Sabisa Films, interviewed on 02 June 2020 at 10:00 AM has also replied as

“Before the implementation of the bill, Brewery (Habesha), Fafa Food Complex, Bank (Dashen & Awash), Cement (Habesha), and Shoe Factory (Anbesa) were the five major clients of the company. However, since the bill was passed in 2019, our clients are banks (Dashen and Awash), Sunvito Food Oil and Real Estates”

The researcher further asked both of the respondents to explain the major impacts of the bill banning advertising alcoholic beverage on media outlets on their respective companies’ overall business environment in terms of competitiveness and profitability.

In response to this question, KII-III said,

“The most severe negative impacts that his company (Cactus) endured due to the banning of alcoholic advertising are decrease in revenue, lay off employees, and reduced tax payment to the government”

KII-IV response to this question was similar to Mr. Abiy’s, but a bit more elaborative. He said,

“Sabisa was one of the well-known advertising companies in town, particularly for its creative adverts for brewery companies mainly Habesha Breweries. Anyone who had seen Habesha Beer advertisements on TV can easily notice how attractive and creative was the production of the adverts. The production of those creative adverts was costly and time taking to make it very attractive to the viewers. We used to charge the brewery companies for such adverts over 4 million birr. However, due to the banning of alcohol adverts on any media outlets, our company business environment, particularly its profitability has been hit severely. The revenue of our company has declined very sharply and our profit has reduced by over 50%”.

To illustrate how much the bill has impacted his company, KII-IV talked about the very recent experiences of his company as follows.

“For instance, just before the bill was passed, our company had finished the production of a TV series movie, which was about to be sponsored by brewery companies. We had heavily invested to produce this movie, hoping that the breweries would cover the cost. However, we couldn’t find any other industries that can sponsor and cover the cost of the production.

No other industries can afford to sponsor relatively high budget movies like ours, except for brewery companies. So, the movie, which we have spent all the money we have is currently on a shelf. We don't really know what to do with it."

The researcher asked the respondents and received the same response about the measures taken by the companies to mitigate the impacts of the bill on their business environment. The companies shifted the marketing strategy from the mainstream media to the digital media and also explored potential clients in other business industries.

Finally, the respondents were asked if they have identified any gap in the bill that needs to be addressed or amended? KII-III from Cactus, replied as

"The bill has totally affected the business environment of the advertising companies, so it would have been better if it had limited the activities of brewery companies instead of total shut down the space through this ban".

With regards to Sabisa, the issue the company has on the bill is a bit different. KII-IV has complained about how the bill was developed and passed. According to his opinion

"The government has not fully engaged all the stakeholders particularly those in advertising and media sector during the entire process. No input from these sectors was taken into consideration when the bill was developed"

4.5 Quantitative and qualitative analysis of the data from the brewery factories

4.5.1. Profile of the brewery factories

For this study, the researcher tried to collect relevant data from two major brewery factories (BGI and Heineken) to better understand the impacts of the bill on the brewery factories. However, due to the unwillingness of one of the brewery factory (BGI) to provide data and attend interview, the researcher was compelled to collect data only from Heineken Brewery Factory. Therefore, the analysis and discussion was based on the information gathered from the Heineken.

Heineken Breweries Share Company based in Kilinto has been operational in Ethiopia since 2011. The company currently has a total of 265 employees out of which 65 are female. The total number of alcoholic products of the company are eight.

Table 15: Profile of Heineken Breweries SC

Name of Brewery	Ownership	No. of operational years in Ethiopia	Number of employees			Number of alcoholic products
			Male	Female	Total	
Heineken Breweries SC/ Kilinto Brewery	Private	9	200	65	265	8

Source: Heineken Breweries SC (2020)

4.5.2. The effects of the bill on business environment over the past one year-Quantitative Findings

4.5.2.1. Effects on alcohol production

The total beer production of the Heineken Breweries S.C. has increased from 122.1 million liters in 2015 to 282.1 million liters in 2019. Over the past five years, the company's beer production increased by average annual growth rate of 25%. Refer Table 16.

Table 16: Total Annual Beer Production in Litres

Name of brewery factory	Total annual production in litres				
	2019	2018	2017	2016	2015
Heineken Breweries SC/ Kilinto Brewery	282,130,600	279,961,300	239,968,100	152,286,600	122,068,500

Source: Heineken Breweries SC (2020)

The overall production of beer increased at annual growth rate of 25% in 2016. In 2017, the annual growth rate reached to its pick 58%. However, the production of beer increased at a decreasing rate since 2018. The annual growth rate, which was 17% in 2018 has sharply declined and reached to 1% in 2019. Figure 7.

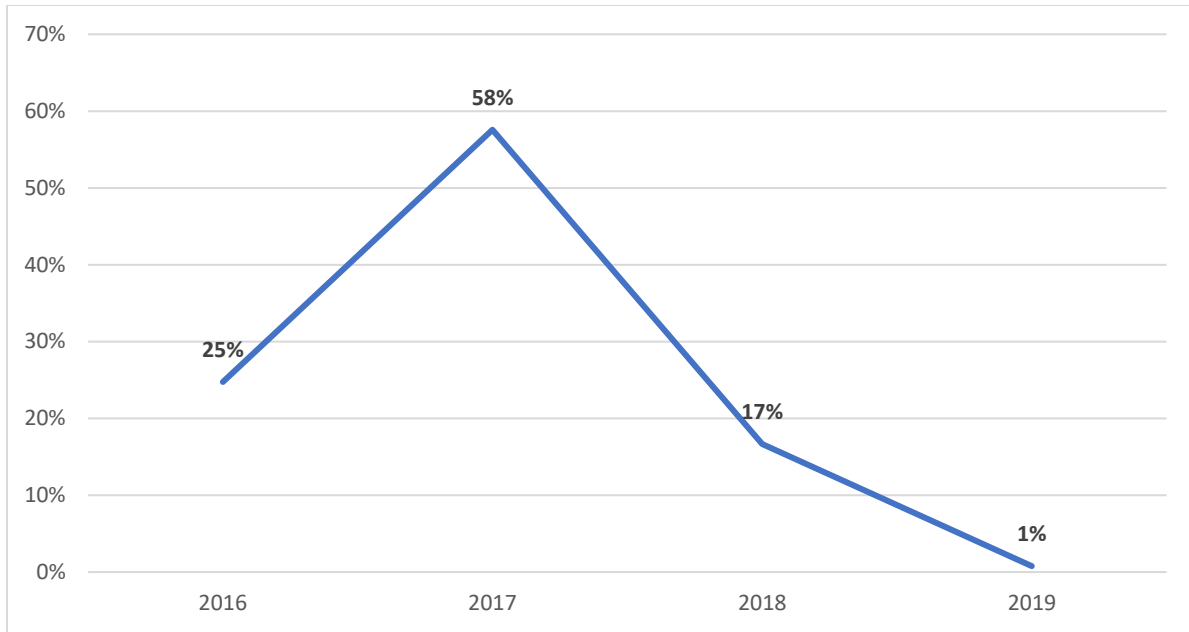


Figure 7: Annual Growth Rate of Breer Production (Source: Heineken Breweries SC 2020)

4.5.2.2. Effects on the labor force of the brewery

According to the company's record, the labor force of the Heineken Breweries has increased from 153 in 2015 to 272 in 2019 with an average annual growth rate of 16%.

Table 17: Total number of employees of Heineken Breweries over the years

Name of brewery factory	Total number of employees of the factory over the years				
	2019	2018	2017	2016	2015
Heineken Breweries SC/ Kilinto Brewery	272	254	221	193	153

Source: Heineken Breweries SC, 2020

The annual growth rate of the labor force has been decreasing over the years (Figure 8). The rate was 25% in 2016, decreased to 15% in 2017 and continued to increase at the same rate (15%) in 2018 as well. In 2019, the annual growth rate reached to 7%.

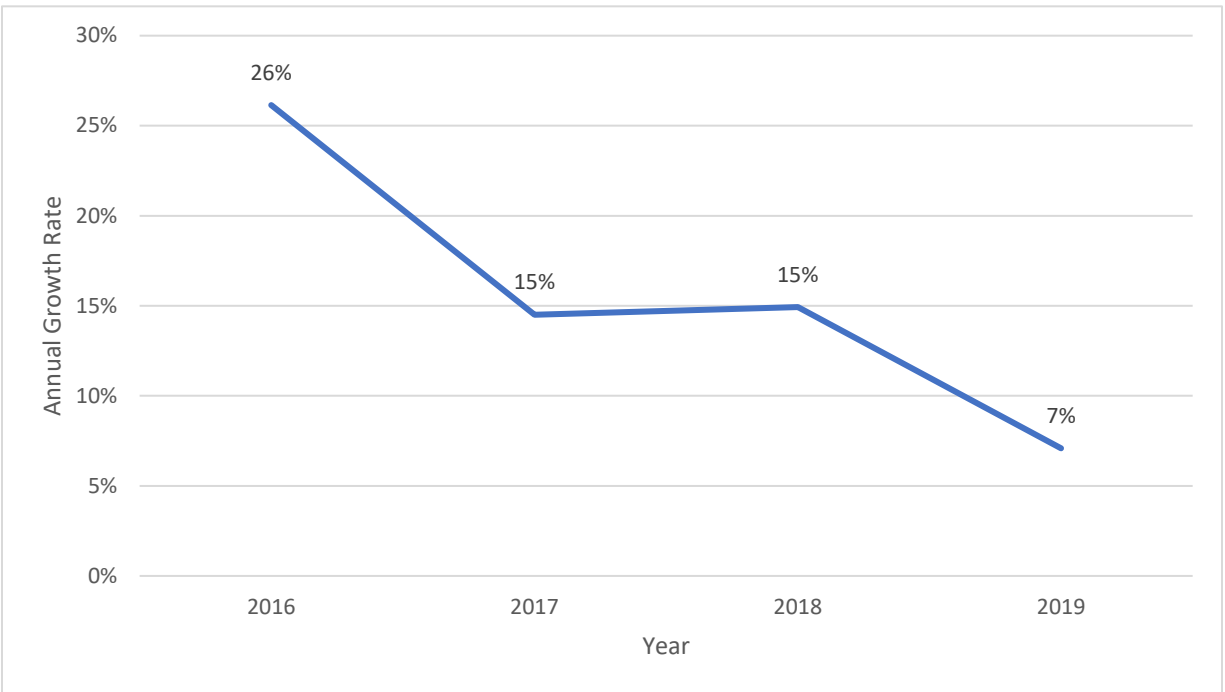


Figure 8: Heineken Company Annual Growth Rate for Labour Force (Source: Heineken Breweries SC, 2020)

4.5.3. Qualitative research findings on the impacts of the bill on business environment

The researcher held an in-depth interview with the key personnel in Heineken Breweries SC using structured key informant interview guide to gather qualitative information that can complement the quantitative findings. To better understand the means through which the company advertise its products before and after the bill passed in 2019, the researcher asked the representative of the company to discuss about the methods of advertising. KII-V, Regional Sales Compatibility Manager at Heineken, interviewed on 4 June 2020 at 2:00 PM replied to the question as

“Before the bill that bans alcohol advertising on any media, our company utilized almost all communication means including TV Advertisement; Radio Advertisement; Billboard; Lottery; Newspaper; Promotion through sales agents; Social Media; and Events. However, since the bill was passed in 2019 our marketing and sales strategy has been changed and focused on intensive promotion through sales agents, social media, distributing to over 250 shops, Addis delivery, increasing visibility inside bar and restaurants”

KII-V was asked to discuss the immediate impacts of the bill banning alcohol advertising on media on Heineken company's overall business environment in terms of competitiveness and profitability. He response was,

“Due to the bill, the production volume and market share has reduced. There has been less competition in the market due to dark market strategy, which happened in the sector since the bill was passed in 2019. In general, our company made less profit in 2019 as compared to the previous years”.

KII-V further explained about the mitigation measures that his company has taken to curb the impacts of the bill on the business environment. According to KII-V, Heineken employed different marketing strategy including advertised its products on social media, established 215 shops around condominium, sponsored events e.g. taste of Adddis, and focused more on outlet visibility.

The researcher finally asked if there is any gap in the bill that the company (Heineken) identified, however, KII-V said that the company has not yet identified any gap in the bill.

CHAPTER FIVE

SUMMARY OF THE FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

This chapter summarizes the study by highlighting the main elements of the research, layout the conclusions and recommendations drawn from the findings of the research.

5.1.SUMMARY OF THE FINDINGS

This research employed a mixed method and collected both qualitative and quantitative data from 187 representatives of the urban society/public, two media houses (FBC and EBS), two advertising companies and one brewery factory. Out of 187 respondents, about 67% were male and the remaining 33% were female. Half of the public survey respondents (50%) were under the age of 30 years. This indicate that the youth population is well represented in this study. Most of the respondent i.e. 85% (which is the majority) are holders of College Diploma or above, and 78% were employed or self-employed.

Close to 60% of the total respondents who drink alcohol were under the age of 30. This indicates that the young population has more tendency to drink alcohol than the older ones. Out of 60% who drink alcohol, 71% drink at least once in a week. Over the past one year, however, alcohol drinking practice has decreased for 70% respondents who drink alcohol. This was mainly due to doctors' advice or health related conditions (48%), lack of money or decreased income (38%), increased price of alcohol (33%) and increased awareness (31%).

In terms of the public awareness about the bill, 58% of the respondents have reported that they are aware of the bill. According to the public opinion, the number of people drinking alcohol as well as alcohol induced violence have not increased in families, villages and Addis Ababa city over the past one year. In general, banning alcohol advertisement on broadcasting media outlets positively affected behaviour of the youth community according to the vast majority (68%) of the respondents.

According to the data from the two media houses (FBC and EBS), there was no direct effect of the bill banning alcohol advertising on the total number of viewers, average advertising cost, and the

labour force of both media houses. However, the annual revenue of the two media houses has decreased due to the bill.

In the advertising sector, the labour force has been decreasing at an average annual growth rate of -5% over the past five years. According to the key informant interview findings, the advertising companies endured severe negative impacts due to the banning of alcohol advertising on media outlets. In the past one year, the advertising companies' revenue decreased (for some by more than 50%) and laid off their employees due to the ban.

In general, beer production of the Heineken Breweries S.C. has increased from 122.1 million litres in 2015 to 282.1 million litres in 2019. Similarly, the labour force of the company has also increased over the past five years. However, since 2018 the production of beer as well as the labour force of the company increased at decreasing annual growth rates. According to the key informant of the company, due to the bill banning alcohol advertising, the production volume and market share of the company has reduced, which in turn decreased the company's profit in 2019 compared to the previous years.

5.2.CONCLUSIONS

The study results and findings indicate that the banning of alcohol advertising on media outlets has resulted in both positive and negative impacts. Alcohol advertising appeals to young people through humour, animation, bright colours and music and it tends to reinforce the link between drinking and socialization and being accepted by peers, which are important concerns for youth (Mekonnen, 2019). As a result of the enforcement of the bill that bans alcohol advertising, the exposure of the youth to alcohol has reduced, which in turn may have contributed to the reduced number of alcohol drinking and alcohol related violence in the city of Addis Ababa. As such, the society's well-being was found to be better off, particularly of the youth community due to the banning of alcohol advertising.

Despite its positive impacts for societal well-being, the enforcement of the bill banning alcohol advertising on media outlets, however, has severely impacted the business environments of the broadcasting media and advertising sectors. The bill has significantly contributed to the decreased revenue, reduced labour force and overall market share, which in turn decreased the profitability of the companies. The enforcement of the bill has been found to be a great shock to the

broadcasting media and advertising companies, which had been heavily reliant on the brewery factories as one of their main sources of revenue.

5.3.RECOMMENDATIONS

Even though banning alcohol advertising on media outlets was the right measure taken by the Ethiopian Government to protect its citizens' well-being, the government should also acknowledge and take note of the various impacts this has brought to the business environment of the other sectors, particularly the media, advertising and brewery industries.

Among the three sectors (brewery, media and advertising), media and advertising sectors were severely impacted by the bill, as the breweries were their major clients, which have significantly invested and largely contributed to the development of both media and advertising sectors in Ethiopia. Over the years, these three sectors have established very important partnerships and mutually beneficial relationship. Before the bill, the media and advertising sectors had been heavily reliant on brewer factories in terms of revenue. When the bill was passed and enforced in 2019, it broke this partnership without laying adequate safety net to protect the business environment of the media and advertising sectors. That is why the impacts of the bill on these two sectors were severe. Thus, it is very much important for the government to take note of this fact and come up with strategies that will sustain the development of these two sectors, without compromising the well-being of its citizens. If all the stakeholders including the media and advertising companies were adequately engaged in the development of the bill, the impact of the bill on the companies would not have been such severe.

The media and advertising sectors actors themselves should assess their business operating environment to identify and tap potential opportunities with other industries and diversify their clients.

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Appendix A

Public Survey Questionnaire

Preamble:

My name is Hanna Tarekegn, postgraduate student of Addis Ababa University. I am conducting a study on '*THE IMPACTS OF BANNING ALCOHOL ADVERTISING ON BREWERY FACTORIES, MEDIA INDUSTRY AND THE SOCIETY IN ADDIS ABABA*', which is conducted as partial fulfillment of an MA Degree in Multimedia Journalism. You are randomly identified as one of the respondents in this study, and you are kindly requested to respond to the following questions in this questionnaire. The information you provide will be kept strictly confidential and the names of individuals will not be included in reporting the findings. Thank you in advance for your involvement in this research. If you have any question on the study or survey questionnaire, you can contact me with the following address: mobile number 0911 484973, email address: htshiferaw@gmail.com

Section I: Respondents' Profile

1. Sex: Female Male
2. Age: Under 21 22-25 26-30 31-35
36-40 41-45 46-50
3. Marital Status: Single Married Separated/Divorced
4. Education: Secondary school and below College Diploma/Degree
Postgraduate degree and above
5. Occupation: Businessperson Student Employee No occupation

Section II: Respondents Drinking Behaviour

6. Do you drink alcohol? Yes No Don't want to answer
7. If yes, how often do you drink? Occasionally, during social gathering/holiday
Once in a month Once in a week Every weekend Everyday
8. If yes, have your drinking habit _____ over past two years?
Increased Decreased Remained the same
9. What was/were the reason(s) for your response (increase/decreased/remained the same) to question 8 above?
 - a. _____
 - b. _____
 - c. _____

Section II: Perception towards the bill banning alcohol advertisement on media

1. Are you aware of the bill passed by the Ethiopian Parliament in 2019 which bans alcohol promotion on broadcasting media outlets?
 Yes No
2. Please refer the table below and indicate your level of agreement for each question on the practice of alcohol consumption and alcohol related violence's using the 5-point scale.

Code	Public perception questions	1. Strongly disagree	2. Disagree	3. Neutral (Neither agree nor disagree)	4. Agree	5. Strongly agree	6. Not applicable
AC1	Number of people drinking alcoholic beverage increased in your family over the past one year (February 2019 -February 2020).						
AC2	Number of people drinking alcoholic beverage increased in your village/neighbourhood over the past one year (February 2019 - February 2020).						
AC3	Number of people drinking alcoholic beverage increased in the city over the past one year (February 2019 -February 2020).						
AV4	Alcohols induced violence increased in your family over the past one year (February 2019 -February 2020).						
AV5	Alcohols induced violence increased in your village/neighbourhood over the past one year (February 2019 - February 2020).						
AV6	Alcohol induced violence increased in the city over the past one year (February 2019 -February 2020).						
AV7	In general, banning alcohol advertisement on broadcasting media outlets positively affected behaviours of youth in your community.						

Appendix B

Structure Key Informant Interview (KII) Guide for Media Company

Preamble:

My name is Hanna Tarekegn, a postgraduate student of Addis Ababa University. I am conducting a study on *‘THE IMPACTS OF BANNING ALCOHOL ADVERTISING ON BREWERY FACTORIES, MEDIA INDUSTRY AND THE SOCIETY IN ADDIS ABABA’*, which is conducted as partial fulfillment of an MA Degree in Multimedia Journalism. Your company is identified as one of the participants in this study, and you are kindly requested to respond to the following questions in this questionnaire. The information you provide will be kept strictly confidential and the names of the organization will not be included in reporting the findings. Thank you in advance for your involvement in this research. If you have any question on the study or survey questionnaire, you can contact me with the following address: mobile number 0911 484973, email address: htshiferaw@gmail.com

Section I: Company Profile

10. Name of your company: _____

11. Ownership of your company: Public Private

12. Number of years operated in Ethiopia: _____

13. Current total number of employees in your company:

Male _____ Female _____ Total _____

14. Total audience of your media: _____

Section II: The effects of the bill on business environment over the past one year

3. Please list the five major businesses industries (types of business sectors; such as banking, insurance, hotels, brewery, etc), which used to advertise their products/services using your media before the bill that bans alcoholic beverage on media outlets was passed in February 2019?

a. _____

b. _____

c. _____

d. _____

e. _____

4. Please list the five major businesses industries (types of business sectors; such as banking, insurance, hotels, brewery, etc), which have been advertising their products/services using your media since the bill that bans alcoholic beverage on media outlets was passed in February 2019?

a. _____

b. _____

c. _____

d. _____

e. _____

5. Number of viewers over the past five years (2015 – 2019)

Total estimated number of viewers of the media				
2019	2018	2017	2016	2015

6. Advertisement rate by time of broadcasting over the years.

Time	Advertisement cost over the years				
	2019	2018	2017	2016	2015
Prime Time					
30 sec					
45 sec					
60 sec					
Normal Time					
30 sec					
45 sec					
60 sec					

7. Total number of employees (both temporary and permanent) of the media company over the past five years (2015 – 2019)

Total number of employees of the company over the years									
2019		2018		2017		2016		2015	
Male	Female	Male	Female	Male	Female	Male	Female	Male	Female

8. What are the three major impacts of the bill banning advertising alcoholic beverage on media outlets on your company’s overall business environment (competitiveness and profitability)?

- a. _____
- b. _____
- c. _____

9. What measures have you taken to mitigate the impacts/effects of the bill on your business environment (competitiveness and profitability)?

- a. _____
- b. _____

c. _____

d. _____

10. Is there any gap in the bill that you have identified, which needs to be addressed or amended?

Yes No

a. If yes, please describe in detail.

11. Have you seen any media company, other than yours who violated the bill and advertised alcohol beverage on air? Yes No

a. If yes, how many were they in numbers? _____

----- Thank You! -----

Appendix C

Structured Key Informant Interview (KII) Guide for Brewery Factory

Preamble:

My name is Hanna Tarekegn, a postgraduate student of Addis Ababa University. I am conducting a study on *'THE IMPACTS OF BANNING ALCOHOL ADVERTISING ON BREWERY FACTORIES, MEDIA INDUSTRY AND THE SOCIETY IN ADDIS ABABA'*, which is conducted as partial fulfillment of an MA Degree in Multimedia Journalism. Your factory is identified as one of the participants in this study, and you are kindly requested to respond to the following questions in this questionnaire. The information you provide will be kept strictly confidential and the names of the organization will not be included in reporting the findings. Thank you in advance for your involvement in this research. If you have any question on the study or survey questionnaire, you can contact me with the following address: mobile number 0911 484973, email address: htshiferaw@gmail.com

Section I: Company Profile

1. Name of the brewery company: _____
2. Number of years operational in Ethiopia: _____
3. Current total number of employees in the factory:
Male _____ Female _____ Total _____
4. Number of alcoholic products of the factory in the market: _____

Section II: The effects of the bill on business environment over the past one year

5. What were the means your factory commonly used to advertise and promote its products before the bill that bans alcoholic beverage on media outlets was passed in February 2019? (please "check" where applicable)
 - a. TV Advertisement
 - b. Radio Advertisement
 - c. Billboard
 - d. Lottery
 - e. Newspaper
 - f. Lottery
 - g. Promotion through sales agents
 - h. Others: please specify
- Others 1: _____
- Others 2: _____

Others 3: _____

Others 4: _____

6. What are the means your factory commonly used to advertise and promote its products since the bill that bans alcoholic beverage on media outlets was passed in February 2019? (please “check” where applicable)

- a. TV Advertisement
- b. Radio Advertisement
- c. Billboard
- d. Lottery
- e. Newspaper
- f. Lottery
- g. Promotion through sales agents
- h. Others: please specify

Others 1: _____

Others 2: _____

Others 3: _____

Others 4: _____

7. Alcoholic beverages production over the past five years (2015 – 2019) in litres

S/N	Types of alcoholic beverage	Total annual production in litres ('000)				
		2019	2018	2017	2016	2015
1						
2						
3						

8. Total number of employees (both temporary and permanent) of the factory over the past five years (2015 – 2019)

Total number of employees of the factory over the years									
2019		2018		2017		2016		2015	
Male	Female	Male	Female	Male	Female	Male	Female	Male	Female

9. What are the three major impacts of the bill banning advertising alcoholic beverage on media outlets on your factory overall business environment (competitiveness and profitability)?

- a. _____
- b. _____
- c. _____

10. What measures have you taken to mitigate the impacts/effects of the bill on your business environment (competitiveness and profitability)?

- a. _____
- b. _____
- c. _____
- d. _____

11. Is there any gap in the bill that your factory identified, which needs to be addressed or amended? Yes No

a. **If yes, please describe in detail.**

12. Have you seen any brewery factory, other than yours who violated the bill and advertised its alcohol beverages on TV/Radio/Newspaper/Billboard? Yes No

a. **If yes, how many were they in numbers?** _____

----- Thank You! -----

Appendix D

Structure Key Informant Interview (KII) Guide for Advertising Company

Preamble:

My name is Hanna Tarekegn, a postgraduate student of Addis Ababa University. I am conducting a study on *'THE IMPACTS OF BANNING ALCOHOL ADVERTISING ON BREWERY FACTORIES, MEDIA INDUSTRY AND THE SOCIETY IN ADDIS ABABA'*, which is conducted as partial fulfillment of an MA Degree in Multimedia Journalism. Your company is identified as one of the participants in this study, and you are kindly requested to respond to the following questions in this questionnaire. The information you provide will be kept strictly confidential and the names of the organization will not be included in reporting the findings. Thank you in advance for your involvement in this research. If you have any question on the study or survey questionnaire, you can contact me with the following address: mobile number 0911 484973, email address: htshiferaw@gmail.com

Section I: Company Profile

1. Name of your company: _____
2. Ownership of your company: Public Private
3. Number of years operated in Ethiopia: _____
4. Current total number of employees in your company:
Male _____ Female _____ Total _____

Section II: The effects of the bill on business environment over the past one year

5. Please list the five major businesses industries (types of business sectors; such as banking, insurance, hotels, brewery, etc), which worked with your company to advertise their products/services before the bill that bans alcoholic beverage on media outlets was passed in February 2019?
 - a. _____
 - b. _____
 - c. _____
 - d. _____
 - e. _____
6. Please list the five major businesses industries (types of business sectors; such as banking, insurance, hotels, brewery, etc), which have been advertising their products/services by your company since the bill that bans alcoholic beverage on media outlets was passed in February 2019?
 - a. _____
 - b. _____
 - c. _____
 - d. _____
 - e. _____

7. Billboard and wall-branding average cost over the years.

	On average, how much have you charged your clients for billboard and wall-branding over the past five years?				
	2019	2018	2017	2016	2015
Billboard					
Wall-branding					

8. Advertisement production cost for media broadcasting over the years.

Time	On average, how much have you charged your clients for advertisement production to be broadcasted on media over the years?				
	2019	2018	2017	2016	2015
Prime-Time					
30 sec					
45 sec					
60 sec					
Normal-Time					
30 sec					
45 sec					
60 sec					

9. Total number of employees (both temporary and permanent) of your company over the past five years (2015 – 2019)

Total number of employees of the company over the years									
2019		2018		2017		2016		2015	
Male	Female	Male	Female	Male	Female	Male	Female	Male	Female

10. What are the three major impacts of the bill banning advertising alcoholic beverage on media outlets on your company’s overall business environment (competitiveness and profitability)?

- a. _____
- b. _____
- c. _____

11. What measures have you taken to mitigate the impacts/effects of the bill on your business environment (competitiveness and profitability)?

- a. _____
- b. _____

c. _____

d. _____

12. Is there any gap in the bill that you have identified, which needs to be addressed or amended?

Yes No

a. If yes, please describe in detail.

13. Have you seen any advertising company, other than yours who violated the bill and advertised alcohol beverage on air? Yes No

a. If yes, how many were they in numbers? _____

----- Thank You! -----