Canary!

Vital Strategies

Exposing Alcohol's Advertising Playbook

Digital Marketing in RESET Alcohol Initiative Countries

Acknowledgements

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Table of Contents

Summary

This Canary report, the first on alcohol from Vital Strategies, was created as part of the RESET Alcohol initiative and seeks to document digital marketing of alcohol products in RESET countries—Brazil, Mexico, the Philippines and South Africa—with a focus on the industry's scale, tactics and target audiences, and policy implications for digital marketing. The report presents data collected with the help of AI tools and carefully analyzed by researchers. The data in this report offers a snapshot of digital marketing activity over a 31-day period in March 2025.

Key Findings

Alcohol marketing has shifted from traditional advertising to sophisticated digital strategies that use social media algorithms and user data to precisely target consumers, particularly young people. These tactics may now be more effective at driving consumption while being extremely cost-efficient.

- Canary's monitoring system captured nearly **4,000 publicly accessible posts** for this analysis. Although this represents only the visible portion of alcohol marketing activity online, these posts alone were estimated to generate more than **2 billion impressions**, highlighting the substantial reach of online alcohol promotion.

- A small group of the largest transnational alcohol companies (i.e., **AB InBev, Heineken, San Miguel**) dominated this online activity.

- These 4,000 posts were mostly found on **Instagram, X, Facebook and news sites**.

- Targeted approaches appeared to seek out **young people and women** as customers**. To attract these potential consumers, marketers offer sweet and flavored products and empowerment messages**, among others**.

- Overall, marketing tactics included **ads directed at consumers (direct ads) as well as events and sponsorships**. Together, these two categories represented nearly 80% of recorded activity. Additional tactics included leveraging "**corporate social responsibility**," activities such as water protection, conservation and global sustainability programs, as well as general **public relations** and **price promotions**.

- Message framings included **celebratory and informational materials**, both of **which help normalize alcohol consumption** in a myriad of situations, from sporting events and concerts to weddings and simple meetups with friends.

- Specific country-level marketing themes observed included **Carnival** in Brazil**; masculinity and bravery** in Mexico**; cartoons and female empowerment** in the Philippines**; and **pride in "regional" alcohol products** in South Africa**.

Conclusions and Recommendations

Within the broader WHO SAFER recommendation to ban or severely restrict alcohol marketing, our analysis highlights the urgent need to extend these measures to the digital ecosystem, where marketing practices are more pervasive, personalized, and harder to monitor or enforce.

Other WHO SAFER interventions such as raising excise taxes on alcohol, strengthening restrictions on availability, advancing drink driving counter measures and facilitating access to screening and treatment for alcohol use disorder also constitute effective ways to curb existing alcohol harms and prevent potential consumption increases.

Introduction

Digital marketing has become a predominant advertising vehicle for promoting products such as alcohol, tobacco and ultra-processed foods. Increased time spent online exposes children, young people, women and others to advertising that encourages earlier and more frequent or intense consumption, contributing to higher rates of noncommunicable diseases, injuries and premature deaths [1,2]. Worldwide, almost 80% of people between 15 and 24 years old use the Internet [3], allowing companies to reach a growing audience of young users via digital media. Promotion occurs both overtly and covertly across social media and other rapidly evolving digital phenomena, including advergaming and non-fungible tokens (NFTs), and on the metaverse [4].

Alcohol has historically been aggressively promoted through traditional advertising strategies glamorizing its consumption in an array of circumstances, despite alcohol's well-documented links to health and social harms such as road traffic crashes, violence against women, child abuse, homicide, suicide and deadly diseases, including cancers and liver and cardiovascular disease [5]. There is now well-accepted evidence of a causal relationship between exposure to traditional alcohol advertising (such as television, radio and magazines) and the early onset of drinking [6]. But alcohol marketing tactics are evolving along with media habits, allowing the industry to reap the benefits of advertising online. Recent research that specifically looks at digital marketing and social media suggests a more pernicious impact on consumption than that of traditional advertising [7].

Alcohol marketers can leverage user data collected and analyzed by social media platforms such as Facebook and Instagram to understand user habits and preferences, allowing them to precisely target customers with persuasive messages. Marketers can also encourage engagement and personal interactions with their brand—precious currencies that allow brands to secure user attention—by, for example, partnering with paid celebrity influencers, sponsoring sporting events, cobranding concerts, or offering vacation giveaways for engaging with their advertising. These advertisements are then pushed and replicated by powerful algorithms, further targeting consumers by showing them what their peer groups and friends like, follow, share and comment on [8,9]. Tracking technologies provide advertisers with real-time metrics and an insider view of users' online actions, allowing them to adjust their messaging and content continuously to maximize their impact. All of this can be achieved at a low cost: A report from Australia found that an advertising campaign there could reach "a thousand young people profiled as interested in alcohol" for as little as about US$2.00 [1].

The combined power of these features of digital marketing should be of utmost concern for the public health community. The restriction of alcohol advertising, promotion and sponsorship is among WHO best buy polices to reduce alcohol harms and noncommunicable diseases [10,11]. While existing policy measures aim to limit alcohol advertising, promotion and sponsorship, including online (see Table 1), the scale and precision of digital marketing create a distinct challenge for alcohol policy efforts. Most national regulations have not kept pace with the technologies, platforms and data-driven tactics that now shape youth exposure, and references to digital media are often made in the context of voluntary restrictions or regulation.

Because the global alcohol market is highly consolidated, with most production and marketing power concentrated among a handful of transnational companies [1], a substantial share of alcohol advertising operates across borders. These dominant companies can easily engage in cross-border marketing that often circumvents or exploits gaps in national regulations. In 2023, the six largest alcohol companies spent more than US$19 billion on advertising globally [12]. Alcohol companies were also early adopters of digital marketing. By 2012, they were reported to have the highest engagement rate of any industry on Facebook [1].

Despite the complexity of the issue and its potential far-reaching public health impact, specific analyses of digital alcohol marketing remain limited [1]. A new tool from Vital Strategies, Canary, uses qualitative and quantitative methods to make visible the scale and the emerging tactics and strategies used by digital alcohol marketers, generating the evidence needed to advocate for stronger policies and protections.

Table 1: Restrictions on traditional advertisement and digital marketing of alcoholic beverages in RESET Alcohol countries

Country	Traditional advertisement	Digital marketing
Brazil	**For alcoholic beverages with alcohol content over ≈13%:** • Advertising of alcoholic beverages on radio and television is only permitted between 9 p.m. and 6 a.m. • In advertisements published in newspapers, magazines, posters and billboards, the warning, "Avoid Excessive Alcohol Consumption," must be written legibly and prominently. • Advertising cannot associate the beverage with sports, images of success, sexuality or healthy performance. • Advertising cannot suggest excessive or irresponsible consumption, nor equate with well-being or health, or associate with civic or religious celebrations [13]. **For alcoholic beverages with alcohol content under ≈13% (voluntary/self-regulatory only):** • Advertising must be responsible, targeted only at adults, without appealing to excessive consumption or social success, and must include clear warnings and moderation messages [14]	• Voluntary/self-regulation only • Websites and social media must contain a provision for selective access to prevent site navigation by those under 18 [14].
Mexico	• Advertisements may not be aimed at those under 18. Media pages must include age verification or visible 18+ disclaimers. • Content cannot depict people who are drinking alcohol or intoxicated, or encourage heavy use, challenges or "celebrations." • Ads cannot link alcohol consumption to success, popularity, attractiveness, prestige or social acceptance, including through imagery or music. Ads cannot present alcohol as beneficial to health, energy, relaxation or mood. • Alcohol cannot be associated with sports, study, religion, work or creativity, or portrayed as part of family or professional activities. • Avoid direct calls to action that encourage consumption such as "try" or "drink now" [15,16].	• Policy guidelines extend the law to digital marketing, including websites, influencers and hashtags [17].
Philippines	• As per the Food and Drugs Administration circular, alcoholic beverages are not to be promoted and advertised to be sold to minors. Packaging and labeling materials shall not be appealing to children. [18] • Note that the Food and Drug Administration circular is an administrative document and does not have force of law.	• The Food and Drug Administration circular may be interpreted to include online and social media advertising, influencer content and other digital promotions.
South Africa	• No advertising in a false or misleading manner or to attract or target minors [19].	• Voluntary/self-regulation only • Marketing may not be directed at persons under 18 years or include audience composition limits (e.g., alcohol ads may not appear where more than 25% of the audience is underage) [20].

About Canary!

The Canary platform, initially launched in 2021 as TERM (Tobacco Enforcement and Reporting Movement), is a real-time monitoring and reporting service that leverages artificial intelligence (AI) combined with expert human analysis to identify and track harmful product marketing online.

Just as miners once used canaries as an early warning system for toxic gases, Canary helps warn governments and advocates of the hidden dangers of unregulated alcohol marketing. Canary collects examples of industry marketing on social media and news sites to uncover campaigns and provides stakeholders with dashboards of powerful, actionable insights. The analysis provides a descriptive snapshot of publicly available social-media marketing activity; it does not estimate total market activity or population exposure.

Originally focused on tobacco, Canary now tracks alcohol marketing, aligning with its mission to expose digital marketing strategies of unhealthy commodities and provide actionable data for policymakers, researchers and public health advocates. Its workflow integrates data processing, analysis and reporting to deliver accurate insights on the extent, nature and tactics of digital alcohol marketing.

This report on alcohol marketing, Canary's first, was developed as part of RESET Alcohol, a Vital Strategies initiative that supports WHO's SAFER technical package for alcohol policy, with a focus on increasing taxation and targeted efforts to restrict marketing and availability [10]. This report focuses on RESET countries (Brazil, Mexico, the Philippines and South Africa) and provides a snapshot of the type of data collected by Canary.

The present landscape report summarizes one month of data collected from March 1 to 31, 2025, drawing on the monitoring of publicly available social media posts collected from a predefined list of official alcohol-brand accounts and keyword-based searches on selected platforms (e.g., Instagram, Facebook, YouTube). These accounts include worldwide transnational companies and country-specific brands in Brazil, Mexico, the Philippines and South Africa. Accounts were sourced from both global corporate offices and national brand or subsidiary accounts to ensure comprehensive representation of marketing practices. This dual approach enabled the Canary system to capture content disseminated by transnational companies through their global campaigns, as well as localized marketing generated by national offices, distributors, retailers and event partners within each country.

Data were captured for the reference month across tracked countries and processed to measure the volume and distribution of captured content, as well as its format type and brand attribution. For more information, please see the technical appendix—methodology.

Key Findings from Canary

Canary identified nearly 4,000 alcohol marketing posts across Brazil, Mexico, the Philippines and South Africa that together generated an estimated 2 billion impressions in just one month.

Across the four countries analyzed, including global marketing by transnational companies, a total of 3,976 individual campaign posts were flagged, verified and classified by Canary as alcohol advertising, with an average engagement of more than 41,600 engagements per post and an estimated total of nearly 2 billion impressions in one month (Table 2). This indicates that the alcohol industry is achieving broad reach and visibility, with notable numbers across digital platforms, especially in impressions.

Brazil and Mexico had the highest volume of impressions, averaging nearly two impressions per person in the population and over two per internet user. South Africa had more moderate levels, with about one impression per user, while the Philippines recorded the least, with fewer than one impression per person (Table 3).

Alcohol companies AB InBev, Heineken Mexico and San Miguel Brewery dominated the monitored sample and were most present on Instagram, X and Facebook.

Among the posts recorded by Canary in these four countries (including posts from transnational companies), the alcohol companies that posted the most were AB InBev (17%); Heineken Mexico (10%) and San Miguel Brewery (8%). In March 2025, the beer industry alone had an estimated reach of nearly 1.6 billion, commanding 42% of the marketing conversation (see Table 4).

Social Media Metrics Terms	
🔍 Comments	Number of comments/replies received
❤ Likes	Number of likes/loves received
▼ Shares	Number of times the post was shared/retweeted
👁 Views	Number of times the post was viewed
★ Engagement	Total user interaction (Likes + Comments + Shares + Views)
📊 Impressions	Impressions represent the potential reach of a post—the number of times content may have appeared on users' screens. This metric estimates exposure rather than confirmed attention, as it does not account for whether users actively viewed or engaged with the content. Impressions therefore serve as a strategic indicator of visibility and dissemination potential, reflecting how widely a message could have been seen within a digital audience. This is automatically calculated by the Synthesio system using the number of account followers/subscribers. The system assumes all the followers of those accounts have seen the message/post. However, it does not capture events where the post is shown to a user via an algorithm or a share; this means these numbers are conservative estimates of real total impressions.

Note: None of these metrics represent unique users, as a single individual may generate multiple impressions, views or engagements.

Table 2: Overview of posts, engagement and reach by country and total

	Brazil	Mexico	Philippines	South Africa	Transnational companies (TNC)	Total
Posts (volume)	913	774	488	1,122	679	3,976
Average engagement	13,967	89,222	163,352	1,013	4,178	41,624
Estimated impressions	412.75 million	226.21 million	60.66 million	49.25 million	1.20 billion	1.95 billion

Table 3: Social media reach and exposure metrics across countries

	Brazil	Mexico	Philippines	South Africa
Population (in millions)[1]	211	131	116	64
Internet users (in millions)[2]	177.24	106.11	97.44	48.64
Percentage of internet penetration[3]	84%	81%	84%	76%
Posts (volume)	913	774	488	1,122
Estimated impressions (in millions) of all posts	413	226	61	49
Impressions as % of the population[4]	196%	173%	53%	77%
Exposures per person in the population[5]	1.96	1.73	0.53	0.77
Impressions as % of internet users	233%	213%	63%	101%
Exposures per internet user	2.33	2.13	0.63	1.01

1 https://data.worldbank.org/indicator/SP.POP.TOTL
2 https://data.worldbank.org/indicator/IT.NET.USER.ZS
3 Share of the population using the internet, calculated as Internet users divided by total population.
4 Impressions were calculated as total estimated impressions/reach divided by the total population, indicating how many times the population was exposed on average. Values above 100% mean multiple exposures per person.
5 Exposure was calculated as the estimated impressions of all posts divided by the total population

Table 4: Overview of posts, engagement and reach by product type

Product type	Posts (volume)	Percentage (%)	Average engagement per post	IMPRESSIONS
Alcopops	403	10%	3,145	58.08 million
Beer	1,685	42%	64,540	1.59 billion
Distilled spirits	1,272	32%	33,829	228.90 million
Non-alcohol product	105	3%	117,493	49.15 million
Store promotion product	29	1%	259	4.44 million
Wine	482	12%	223	23.79 million
Total	3,976	100%	41,624	1.95 billion

Alcohol marketing posts were primarily recorded on Instagram (36%) and X (26%), followed by Facebook (19%) and online news sites (14%), as well as on the websites of popular magazines (2%) (Figure 1). This underscores the reliance of alcohol companies on platforms that maximize visibility and engagement with online audiences.

Across 17 countries, a recent meta-analysis found, especially among youth and young adults, that "exposure to digital alcohol marketing was associated with increased odds of past 30-day alcohol use, binge drinking, susceptibility to alcohol use among never users, and lifetime alcohol use".

This contributes to "the growing body of evidence on the digital determinants of health, a domain recognising that digital environments, particularly those shaped by commercial actors, have a central role in shaping population health." [21]

Figure 1: Distribution of posts across platforms by country and transnational alcohol company accounts
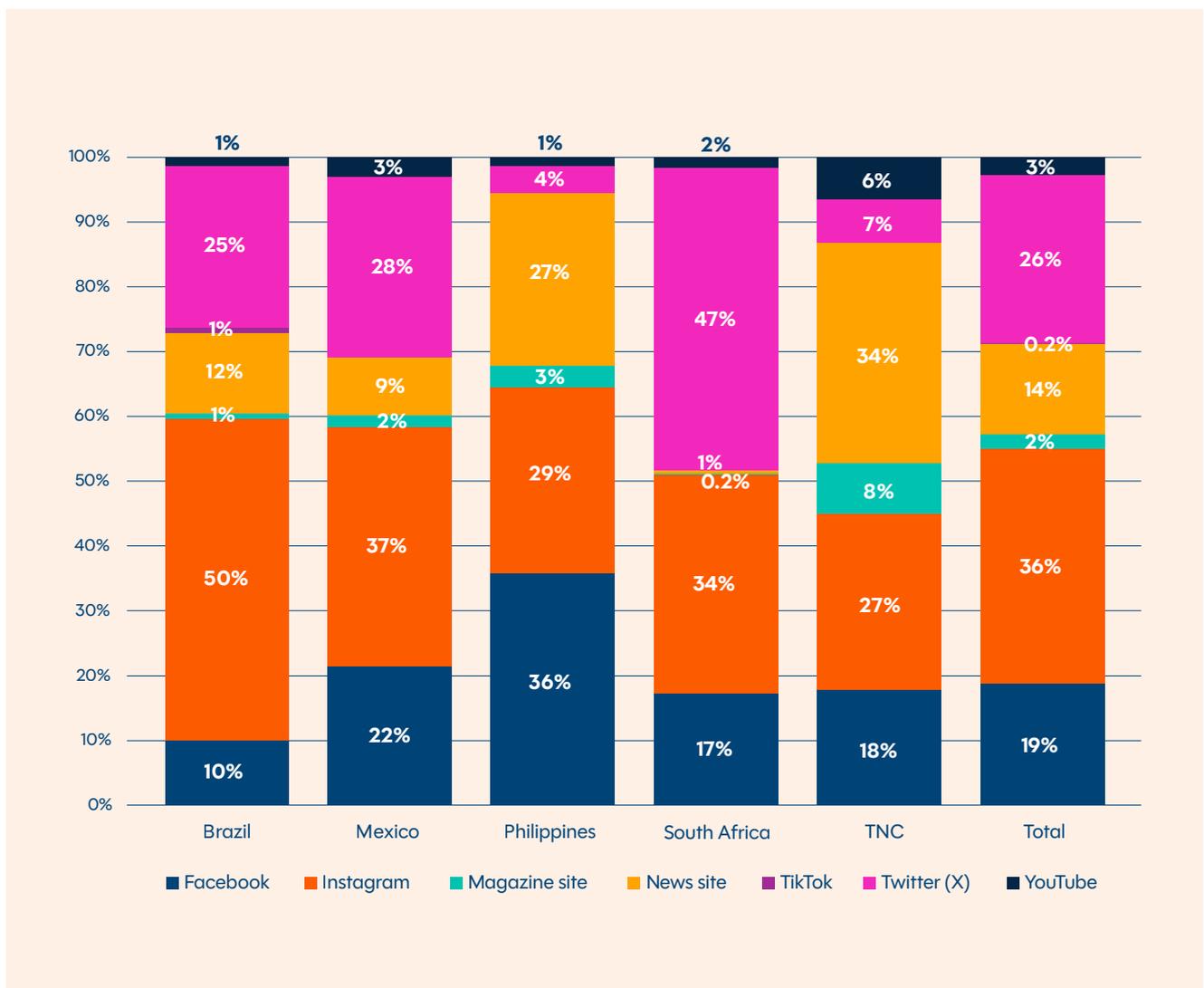
Note: This metric indicates relative activity within the captured dataset, not the total volume of alcohol marketing across all digital channels.

Marketing tactics are highly varied, blending the attributes of traditional advertising with newer digital formats that are embedded, personalized and, at times, covert. For example, while lifestyle marketing has long been a feature of traditional advertising, its reach and influence is amplified by virtue of its seamless integration into everyday digital culture and social media interactions that offer customer engagement with alcohol brands and the popular events they sponsor (Figure 2).

Overall, during the review period, marketing tactics across these countries relied heavily on **direct ads** and **events/sponsorships**, making up nearly 78% of monitored posts combined (Figure 3). Additional tactics included the use of "**corporate social responsibility**" messaging, **public relations** strategies and **price promotions**. See appendix for definitions of marketing tactics.

Figure 3: Distribution of marketing tactics

- ■ Direct ads
- ■ Public relations
- ■ Corporate social responsibility
- ■ Events, occasions, and sponsorships
- ■ Price promotion
- ■ Community-based marketing
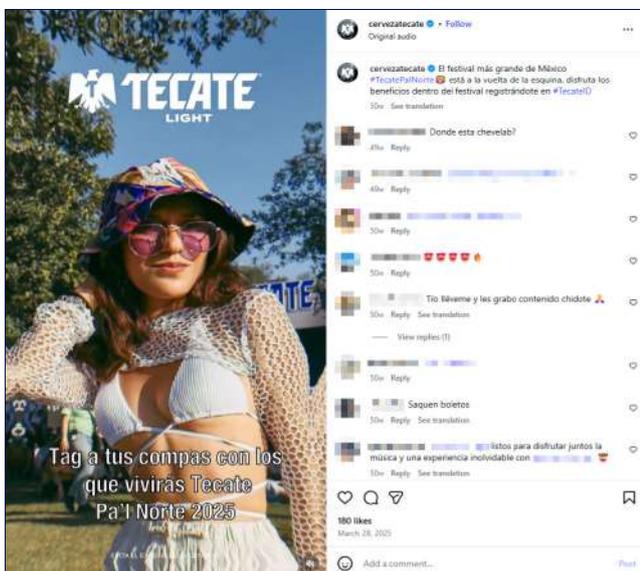
Figure 2: One of the largest music festivals in Latin America is sponsored by beer brand Tecate in Monterrey, Mexico. In this post, the company encourages engagement by inviting potential attendees to tag the friends that will accompany them. Links to the Tecate website are also featured, where potential customers are exposed to more advertisement and can register online to get their "TecateID," which allows them to win "exclusive access" and "official Tecate merchandise." Source: @cervezatecate on Instagram

Direct ads explicitly promote branded alcohol products to stimulate sales and reinforce brand recognition, making them a key driver of online consumer exposure (Figures 4 and 5). Visibility is further sustained through celebrity partnerships, sports sponsorships and cultural tie-ins. Even when placed in the context of major events or holidays, the defining feature of direct ads is that they foreground the product, even though online promotions may extend their reach through other strategies.

Figure 4: This post invites consumers to "escape into nature" by exploring a Caribbean island branded by Corona beer. Through this post, users can reserve their all-inclusive vacation where Corona products are served. Source: @corona on Instagram.

Figure 5: Using the hashtag *SeñoraDelBaileys* (BaileysLady), the liquor is promoted as the perfect ingredient for a spring dessert. Source: @baileysmx on Instagram

Events, occasions and sponsorships represent a distinct and dominant tactic, linking alcohol to large-scale cultural celebrations (Figure 6). Bran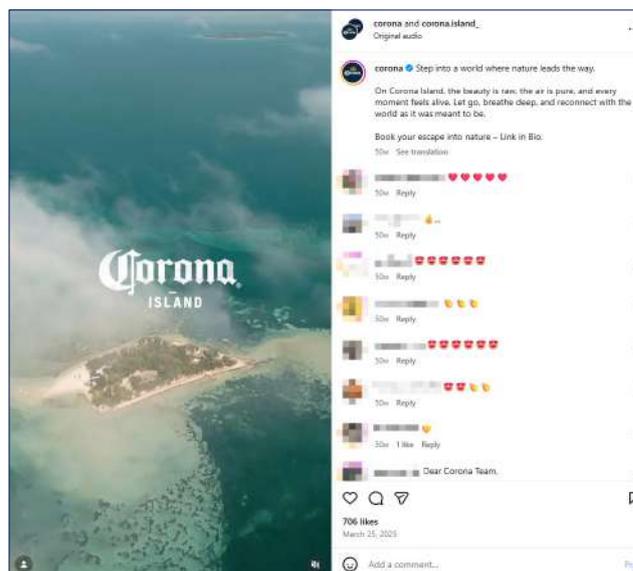ds sponsor and appear at major events, such as FIFA tournaments, and collaborate with artists popular among youth who perform on alcohol-branded stages. Brands also work to associate products with festivals such as Brazil's Carnival (see a more in-depth look at Brazil on p. 16).

Figure 6: An invitation to sip a beer at the 2025 Wimbledon tennis tournament. Source: @StellaArtois on X

Discounts, giveaways and other price promotions are a longstanding tactic used to make alcohol more affordable and appealing to consumers. These include discounts, coupons, giveaways, contests, or "free" merchandise or clothing (Figures 7–9). What distinguishes today's digital versions is the way these promotions, embedded in social platforms, can now be personalized to users and invite them to participate in aspirational experiences beyond the product itself.

Figure 7: In Brazil, in a post containing references to the Amstel-sponsored reality show Big Brother Brazil, the beer brand encourages users to "tag a friend you want to travel with to Amsterdam" as part of a trip giveaway they offer. Source: @amstelbr on Instagram

Figure 8: Some marketers used International Consumers' Rights Day, organized by the consumer advocate group Consumers International, to encourage consumption with discounts recognizing the day with 10% off cachaça products in Brazil. Source: @cachacaseleta on Instagram

Figure 9: At the popular Wanderland music festival in the Philippines, San Miguel's Flavored Beer offered shirts and tote bags for purchasing *five cups* of their product, while simultaneously reminding consumers to "Drink Responsibly." The ad refers to consumers as "beshies" ("best friends" in idiomatic Tagalog). Source: @smfbph on Instagram

Marketing tactics can further be categorized through distinct **message framings** commonly used by alcohol marketers (Table 5). Overall, during the review period, messaging appeared to rely primarily on **informational appeals** and **secular/ community celebrations**, making up nearly 68% of monitored posts (including all countries and transnational companies). Other frames included **entertainment, product features**, **glamorization**, **eco-awareness** and **social welfare**. See appendix for definitions of message framings.

Table 5: Distribution of message framing

Message framing	Brazil (%)	Mexico (%)	Philippines (%)	South Africa (%)	Transnational companies (%)	Total (%)
Informational	35	50	23	38	56	41
Secular community celebrations	31	11	24	36	26	27
Entertainment	8	11	24	11	6	11
Product features	17	8	19	3	4	9
Personal care and wellness	6	4	7	4	<1	5
Glamorization	<1	7	1	5	6	4
Environment eco-awareness	<1	6	<1	1	<1	2
Social welfare	<1	2	<1	<1	<1	<1
Health claims	<1	<1	<1	<1	<1	<1

Informational campaigns (41%) emphasize "educational" content (Figure 10), including product history and pride in production, such as Jameson's video tours of their traditional whiskey barrel-making process. Messages about **secular community celebrations** (27%) link products to national or cultural traditions, while **glamorization** links alcohol with luxury, celebrities and exclusive lifestyles (Figure 11). **Entertainment-oriented messaging** (11%) showcases engaging experiences connecting alcohol to leisure and recreation, such as Heineken's "Social Screen" campaign, a live publicity stunt relying on technology that attached hundreds of individuals' phones side-by-side to form one big screen (Figure 12).

Figure 10: This informational post from Brazil invites consumer engagement and suggests alcohol use night and day: "We want to know: what is the best time to enjoy a traditional American lager? In the afternoon? At night in a bar? During the day while grilling?" Marketers use a clever word play: "*Tardezinha*" means "little afternoon" but is also a music event sponsored by Itaipava. Source: @itaipava on Instagram
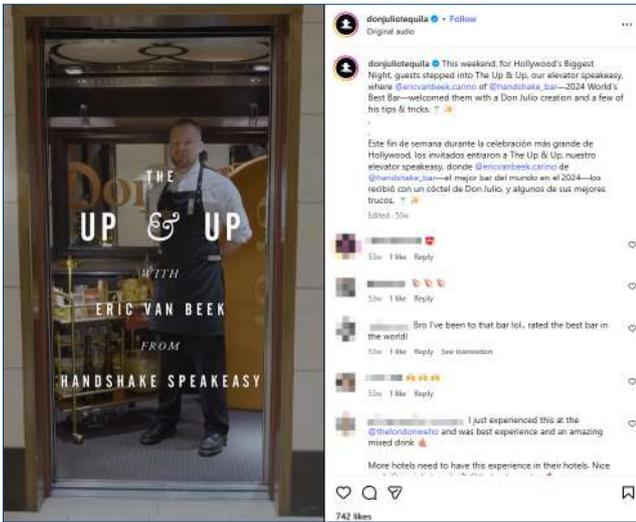

Figure 11: This bilingual post documents a special event organized by marketers, during which guests were invited to highlight the 2025 Academy Awards by attending a night at the "World's Best Bar," an exclusive Mexico City speakeasy, where they were able to meet with its celebrity cocktail chef. Source: @donjuliotequila on Instagram
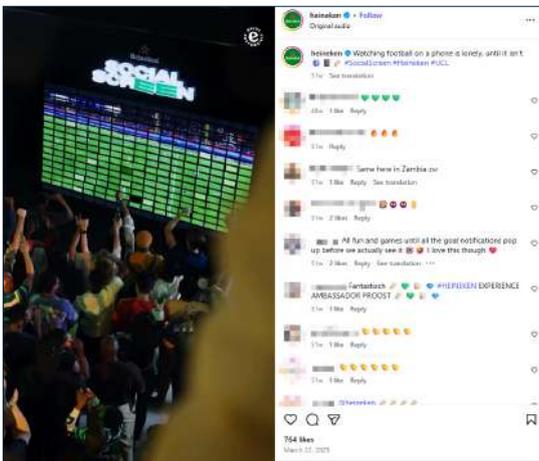

Figure 12: Heineken International leveraged entertainment messaging with this publicity stunt based in Johannesburg, South Africa, presenting its alcohol product as unifying sports enthusiasts who might otherwise enjoy a game on their own.

Source: @heineken on Instagram

Other framings align brands with purported **personal care**, **wellness** and **healthy lifestyles** trends, for example by developing non-dairy versions of products or partnering with professional sports organizations. Some posts even include **health-related claims** by promoting natural and/or organic ingredients and low-calorie products.

Targeting Women and Youth

Far more men consume alcohol than women [22]. To reach women as consumers, industry spread messages that leverage aspirational imagery and language appealing to women and youth culture.

Campaigns encourage women to express independence and self-confidence, while positioning alcohol as a symbol of luxury, wellness, exclusivity and high-status lifestyles, or as an opportunity to experience happiness, sisterhood and friendship (Figures 13-15). Health-oriented claims target concerns predominantly found among young women such as fitness and dieting, and position alcohol consumption as compatible with a healthy lifestyle.

This emphasis on young people and women is clear: They are mentioned in numerous alcohol industry documents as a key growth sector of strategic importance [1]. The average age of the population in Latin America, Asia and sub-Saharan Africa is lower than that of countries in North America and Western Europe, thereby providing a huge and growing market. And as more women join the organized workforce and obtain financial independence, women are seen by producers as a consumer group that can increase their sales [23]. "Understanding the female opportunity" is explicitly named in the Latin America strategies of several transnational companies [1]. These strategies include "developing rituals to make drinking beer more special" by introducing new products and mixed-gender marketing [24,25].
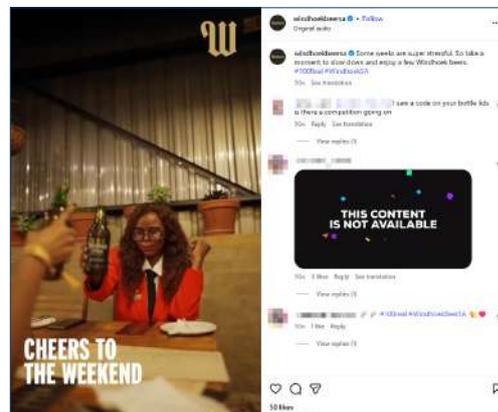

Figure 13: This post from South Africa depicts young women consuming alcohol socially to unwind from a stressful week at work, reinforcing normalization and associating alcohol with a financially independent life in the workforce. Source: @windoekbeersa on Instagram

Figure 14: A post from the Philippines reminds women that "No matter what you do in life, people have something to say. So, just be yourself. You do you!" The post depicts alcohol as a tool to assert women's individuality, defiance and freedom, including drinking on her own. Source: Maria Clara Sangria on Facebook

Figure 15: In the Philippines, a hard seltzer is promoted as a chance to celebrate with female friends, taking the opportunity presented by the United Nations International Day of Happiness. Source: @sanmighardseltzer on Instagram

All this marketing has an even darker side. The earlier a young person starts drinking alcohol, the higher the risk of a pattern of heavy alcohol use later in life. And young people are particularly susceptible to alcohol marketing because they often lack the control, judgment and cognitive maturity to understand the sophisticated ways in which they are being manipulated by advertising. Digital advertising is all the more complicated to tease out as it includes posts from friends and influencers that reinforce the marketing messages [26].

Industry Hypocrisy: "Corporate Social Responsibility" and Promoting Responsible Drinking

Some marketing examples from the review period demonstrate how the alcohol industry, in particular Heineken, uses **greenwashing** and **corporate social responsibility** messaging to cultivate a positive image, while downplaying the health and social harms linked to its products (Figures 16–18). Alcohol companies present themselves as socially responsible, yet their practices reveal a substantial gap between messaging and reality.

Figure 16: Alcohol companies tout messages about their sustainability, all the while using large amounts of water in water-stressed countries, including Mexico and South Africa. Source: @heinekenmexico on Instagram

Figure 17: "Corporate social responsibility" marketing celebrating World Water Day as a milestone for the beer industry's "stewardship journey." Source: @theheinekencompany on Instagram

Figure 18: Posts featuring the beer industry's participation at Sustainability Summits in the African region. Heineken frequently promotes its corporate social responsibility programs around water protection despite facing criticism over excessive water use in Africa [27]. Source: @heinekenBeverages on X

Alcohol Marketing in RESET Countries

Brazil

In Brazil, some 913 unique posts were captured, generating an estimated 412 million impressions, with moderate consumer engagement (13,967 interactions, on average) (Table 2). Approximately half of these posts were on Instagram. Leading alcohol companies were Ambev (23%), Grupo Petrópolis (15%), Diageo (8%) and Heineken Brazil (5%). Although beer is the most consumed product in Brazil, distilled spirits accounted for nearly half the volume of posts captured, followed by beer at 23% and alcopops at 18% (Figure 4).

Figure 19: Distribution of volume of posts and impressions by account type in Brazil
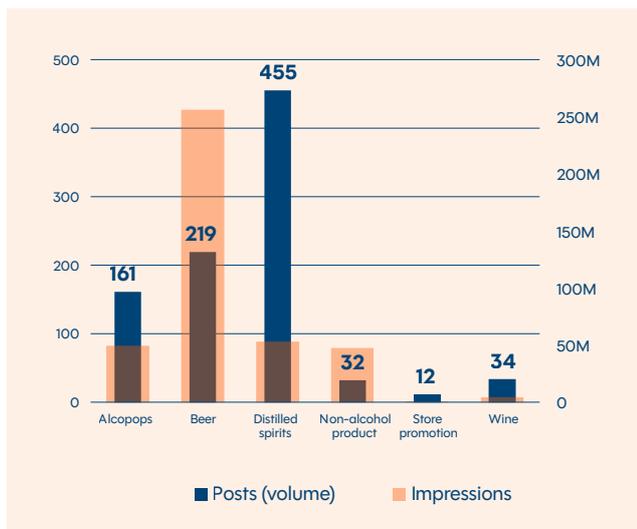
Though advertised less than spirits, beer produced significantly more impressions, which may reflect its popularity in Brazil.

The most heavily promoted product brand in the captured posts was Mike's Hard (11%) from Ambev, an alcopop brand widely known in the United States and Canada but less so in Brazil. Mike's Hard was a lead sponsor of Lollapalooza 2025, a popular music festival in Sao Paulo, and was therefore frequently featured in news coverage related to the event. It was followed by: the beer Cerveja Petra (8%), from Grupo Petrópolis; the alcopop drink Beats (7%); the spirit Amarula (5%), from Amarula Brazil; and Itaipava beer (5%), from Grupo Petrópolis. Carnival, Brazil's largest cultural celebration, provided a huge opportunity for event promotion, representing 40% of the posts from the review period, closely followed by direct ads (39%).

During Carnival, beer and spirits brands sponsored live events and enormous parties (Figure 20). Beefeater Gin posts showed images of an unrestrained party atmosphere, contrasting with disclaimers at the bottom of captions reminding partygoers to exhibit restraint and "drink in moderation" (Figure 21). In vibrant video reels, brands such as Johnnie Walker Blonde and Beats promoted their products with the help of mega-celebrities Luiza Sonza and Anitta, two Brazilian singers with 30M and 63M followers, respectively. Luiza Sonza is tagged in the Johnnie Walker Brazil post, enhancing the post's visibility (Figure 22). Her profile shows she is also a regular spokesperson for Johnnie Walker Brazil. Via a simple interaction with the post, which is pushed to the top of the comments, Anitta automatically multiplies the brand's reach. Once Carnival was over, Cerveja Petra continued to leverage content from the event, putting together "Rewind" reels and inviting comments from Instagram users eager to "go back in time" (Figure 23).

Figure 20

Figure 21

Figure 22

Figure 23

Sources: @beatsoficial on Instagram, @beefeaterbrasil on Instagram, @johnniewalkerbrasil on Instagram and @cervejapetra on Instagram

The "Brahma Phenomenon"—Outsourced and Indirect Brand Promotion

During the March 2025 monitoring period, an anomaly was detected about Brahma, one of Brazil's most prominent beer brands and a sponsor of Carnival. Although Brahma was included in the list of alcohol brand accounts monitored by Canary, few posts were captured during data collection. Upon investigation, it was found that Brahma's digital marketing activity during this period was largely outsourced to external or partner accounts, including event organizers pages and influencer collaborations, rather than being posted directly from the brand's verified account (Figure 24). As a result, these posts were not captured by the automated tracking system, which primarily collects content originating from official brand accounts or matching predefined keyword lists (specific account settings and configurations limited the system's ability to retrieve those posts—see technical appendix). To address this, future monitoring cycles should integrate additional search parameters and partnership mapping to better capture outsourced or co-branded promotional content and ensure more comprehensive representation of brand activity. This case illustrates a broader industry strategy of indirect promotion, where brand visibility is achieved through partnerships and cross-promotional content, making detection through account-based monitoring more challenging.

Source: @loreimprota on Instagram

Mexico

Across Mexico, 774 unique posts were captured, leading to an estimated 226 million impressions and generating robust engagement (89,000 interactions, on average) (Table 2). Most of these posts were found on Instagram (37%), X (28%) and Facebook (22%), from alcohol companies Heineken (49%), Bacardi (9%) and Grupo Modelo (8%). Beer accounted for approximately 50% of the posts captured and the highest related impressions, reflecting the popularity of the beverage in the country. It was followed by distilled spirits (31% of posts) and wine (9%) (Figure 5).

Figure 25: Distribution of volume of posts and impressions by product type in Mexico
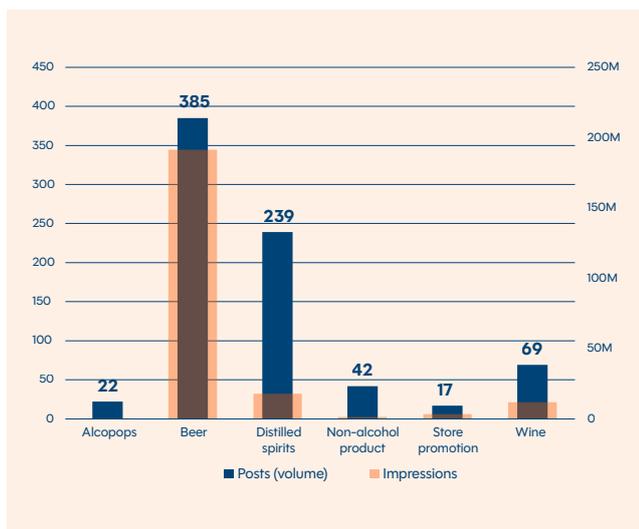
Beer was the most advertised product in number of posts captured and in related impressions.

Heineken's namesake beer was behind 19% of the posts flagged by Canary. Other popular product brands included: Indio (9%), from Heineken Mexico; Bacardi (7%), from Bacardí company; Jack Daniel's (6%), from Jack Daniel Distillery; and Tecate (5%), from Heineken Mexico.

Mexican marketers appeared to rely particularly on direct advertising (52%), the highest among the countries studied, followed by events, occasions and sponsorships (23%), as well as general public relations (10%). Corporate social responsibility campaigns (8%) were also employed. About half the posts' messages were informational, with an emphasis on the relationship between regional traditions and spirits such as tequila and mezcal. Other posts,

in particular from beer products, aligned with touchstones of masculinity and toughness, featuring cultural and celebrity icons and leaning into warfare imagery and narrative (Figures 26–29). This is concerning, considering that polling commissioned by Vital Strategies shows violence against women and violence's effect on children as a leading alcohol-related concern in Mexico [28].

Beer was promoted in the context of combat sporting events such as Ultimate Fighting Championship, while the brand Indio tapped into Mexico's indigenous culture and history, inviting *"guerreros"* or "warriors" consumers to collect branded merchandise. Notably, Heineken introduced its Tecate Por Ti campaign in Mexico, featuring Sylvester Stallone. Marketers such as Mezcal Wahaka also posted stories positioning mezcal as an artisanal product made in a traditional manner, equating the consumption of their products with a deeply embedded cultural experience.

Figure 26

Figure 27

Sources: @heinekenmexico on Instagram and @wahakamezcal on Instagram

Figure 28

Figure 29

Sources: @barlaveinte on X and @cervezaindio on Instagram

Online, the industry promotes itself not only through direct advertising on social media but also by embedding itself in news content. FEMSA (Fomento Económico Mexicano), which owns the large chain of convenience stores OXXO and sells alcohol, announced the launch of its "Violet Points" strategy to offer a safe haven for women. The program, which was covered by online news sites, plans to install panic buttons in OXXO stores for "at-risk women."

Source: La Vanguardia Mexico

While the type of risk the strategy aims to tackle was not specified, it is worth mentioning that in Mexico, 24% of interpersonal violence crimes involve alcohol use, and that 65% of victims are women [29].
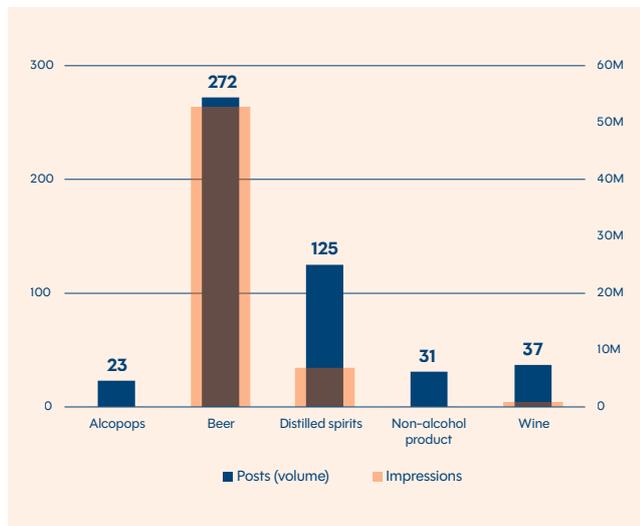
Philippines

During the review period, the Philippines saw the lowest volume of posts (at 488) among the four focus countries, but they nevertheless generated about 60 million impressions and achieved the highest average engagement with 163,352 interactions per post, on average (Table 2). Over a third of these posts were on Facebook (36%), followed by Instagram (29%). In addition, 27% of captured posts were on news sites, the highest of all RESET countries, often announcing sports events sponsored by alcohol companies. Across platforms, advertising was dominated by San Miguel Brewery (67%), followed by Limtuaco (8%) and Tanduay Distillers (5%). Beer was the most marketed product at 56%, followed by spirits (26%). Non-alcoholic products had a modest but notable presence at 6%, the highest of the four countries.

Figure 30: Distribution of volume of posts and impressions by account type in the Philippines

Although spirits re among the most consumed type of alcohol in the Philippines, beer was the most advertised product in number of posts captured and in related impressions.

San Miguel Beer was the product brand most advertised (6%), followed by San Miguel Flavored Beer (5%) and Purefoods (5%). The latter is the largest food brand in the country and a subsidiary of San Miguel Corporation. This suggests a tightly integrated marketing strategy that blends beverages and processed foods.

Figure 31

Figure 32

Figure 33

Figure 34

Sources: San Miguel Pale Pilsen on Facebook, Red Horse Beer on Facebook, @smfbph on Instagram and @sanmiguelbeerph on Instagram

In terms of marketing tactics, most posts in the Philippines were direct ads (43%) and events, occasions and sponsorships (28%). Messages were spread across secular community celebrations (24%), entertainment (24%) and informational (23%) framings. Through it all, alcohol companies in the Philippines often appeared to target young consumers, especially women. San Miguel products had campaigns such as San Miguel's "Women's Month" promoting its Chocolate Lager, and framing alcohol as a symbol of female empowerment (Figures 31–32), despite recent surveys showing that the public is concerned about alcohol's link to violence against women [30]. Other ads appear to target young people with cartoon images that hark back to tobacco's Joe Camel (Figure 33), even though they bear "For 18 years old and above only" warnings in small fonts. Notably, San Miguel Flavored Beer, which comes in sweet flavors such as apple and lychee that can mask the harsh taste of alcohol, advertised in the context of music festivals, inviting attendees to make "#Sweeeet memories" with their *"beshies"* ("best friends") (Figure 34).

South Africa

South Africa had the highest number of posts (1,122) during the review period, reaching approximately 49 million users, yet it generated the lowest average engagement (~1,013 interactions per post)(Table 2). Almost half the posts were found on X, suggesting a strategy seeking to generate conversation around the products and initiatives featured. Leading companies included InBev (32%), Distell Group (28%) and Heineken SA (28%).

Figure 35: Distribution of volume of posts and impressions by product type in South Africa
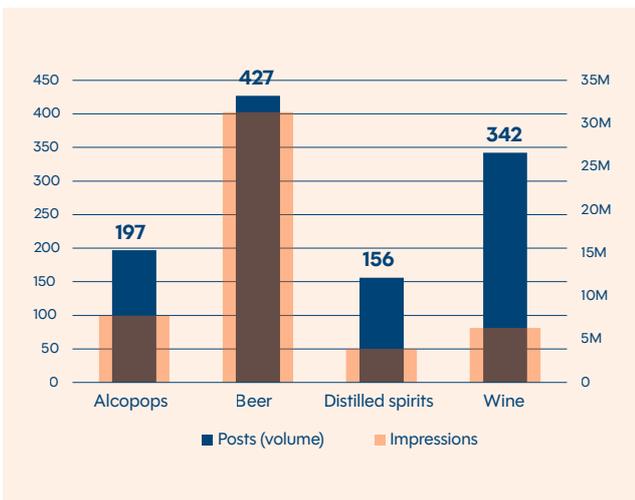
South Africa also presented the most diverse marketing product mix of the four countries, with beer at 38%, wine at 31%, alcopops at 18% and spirits at 14%, offering a broader range of alcohol types, potentially to appeal to a variety of potential new consumers [1]. Castle Lager was present in 13% of the posts tracked by Canary, followed by: Heineken (7%); Savanna Cider (7%), also from Heineken SA; Brutal Fruit Spritzer (6%), from AB InBev; and Flying Fish beer (6%), also from AB InBev.

Marketing tactics included direct ads (59%) followed by events, occasions and sponsorships (25%). As in the other countries, messages often linked alcohol consumption to sports, stress relief, beauty, glamour, and good times spent with friends at brunch or music festivals. But there were also many issue-oriented posts celebrating national development, pride in workmanship and even human rights. Many of these posts came from the South African wine industry, one of the top-producing wine industries in the world.

Brands such as Brutal Fruit and Flying Fish had elaborate activations and campaigns, organizing events with media agencies and promoters (Figure 36-37). Meanwhile, wine estates highlighted their environmental and human rights records (Figure 38-39), in vivid contrast with South Africa's history of the "dop" system, under which farm workers were paid in alcohol instead of money. This system led to significant issues in Black communities, such as alcohol use disorder, poverty, social vulnerability, and high rates of fetal alcohol spectrum disorders [31].

Figure 36

Figure 37   **Figure 38**

Figure 39

Sources: @flyingfishsa on Instagram, @brutalfruitza on Instagram, @jordan_wines on Instagram and @cederberg_wines on Instagram

Conclusion

This review of alcohol digital marketing activity across Brazil, Mexico, South Africa and the Philippines in March 2025 demonstrates the extensive reach of the posts observed through Canary, which were estimated to generate nearly 2 billion impressions in just one month. This shows the broad reach and influence of the alcohol industry on digital platforms. Marketing tactics like direct advertising, sports sponsorships and cultural event promotion accounted for nearly 80% of observed marketing activity. However, other approaches—including corporate social responsibility initiatives, community partnerships and environmentally-focused campaigns—were employed to enhance the industry's legitimacy and social standing. The WHO warns that such strategies obscure the health and social harms of alcohol while positioning producers as partners in health promotion, despite their evident conflicts of interest [1].

The power of digital marketing was put on full display in the posts captured by Canary. Digital marketers actively leveraged social media features to stimulate consumer engagement with their brands and products, tagging influencers with millions of followers, offering free merchandise and perks for users who interacted with their posts, and producing curated content about aspirational experiences and activations alcohol companies organized during massive events such as Carnival in Brazil and music festivals in Mexico and the Philippines.

Our analysis documents how alcohol marketing leverages lifestyle cues, gendered imagery and brand narratives that appear tailored to broad audience segments rather than to individual users. Although our method captures only publicly accessible posts and does not allow us to assess personalized or targeted advertising at the user level, the content reviewed shows consistent use of strategies designed to resonate with specific demographic or cultural groups—for example, women's empowerment drinking imagery, ubiquitous beer-related lifestyle content, corporate social responsibility-themed campaigns, and appeals to heritage or tradition. Such approaches may help brands cultivate legitimacy, embed themselves in everyday social environments, shape consumption norms, and may thereby complicate policy and regulatory efforts.

Our findings complement WHO concerns regarding concentrated market power and increasingly sophisticated promotional strategies used by the alcohol industry [1], showing that digital alcohol marketing now operates at scale as a core driver of exposure and normalization, particularly among young people. This demands commensurate policy attention, improved monitoring capacity, and stricter enforcement.

Limitations

- While Canary provides ongoing monitoring of digital alcohol marketing, this initial report focused on a single month of data. Subsequent analyses—covering multiple months of data—focusing on longitudinal trends and patterns over time would allow comparative insights as data collection scales up.

- Because data were drawn from selected brand accounts and a defined monitoring window, results should be interpreted as descriptive indicators of marketing presence and framing, not as inferential statistics or population-level estimates.

- The role of influencers and brand ambassadors in promoting alcohol presents new challenges for alcohol policy [32,33]. Canary includes influencer content when it is either shared or reposted by official brand accounts or when it comes from influencers promoting alcohol who meet defined inclusion criteria (having more than 1,000 followers, displaying a paid partnership disclosure with an alcohol brand such as "#ad" or "#sponsored"), or showing a consistent history of promoting alcohol or

other harmful products. However, in its current configuration, Canary ingests only direct, original posts from verified or commercial brands, influencer, news and magazine accounts, and intentionally excludes tagged posts, comments, reposts and quote-reposts to maintain data integrity. Influencers, retailers and other commercial accounts that promote alcohol but fall outside this scope are not captured by the system (see box on the "Brahma Phenomenon"—outsourced and indirect brand promotion). As alcohol companies increasingly route promotion through such personal or lifestyle accounts, the dataset likely underestimates the full scale and reach of digital alcohol marketing. The posts presented here should thus be interpreted as the visible portion of a much larger promotional ecosystem. In the future, artificial intelligence could be helpful in extending the reach of monitoring beyond formal accounts to capture the full breath of marketing reach.

Recommendations

Alcohol policy must keep up with media trends and be comprehensive and forward thinking, in particular as it relates to marketing restrictions. Otherwise, the industry will simply move to new unregulated platforms. Restrictions must consider internet sites, streaming services, promotion and brand stretching, social media, video games and virtual reality, points of sale, product placement, apps and algorithmic targeting—essentially all advertising.

"The rules for cross-border marketing should be developed by government and public health interests and should be informed by the best available public health evidence. Those actors with a conflict of interest should not be involved in the policy formulation, and engagement should be limited to due process requirements, notice and comment and other transparency obligations."

Reducing the harm from alcohol – by regulating cross-border alcohol marketing, advertising and promotion, WHO technical report, 2022 [1]

In line with WHO's SAFER initiative, governments should adopt comprehensive marketing restrictions, strengthen cross-border regulation, and invest in surveillance and counter-marketing systems that expose manipulative industry practices. The World Health Assembly has also endorsed "enacting and enforcing bans or comprehensive restrictions on exposure to alcohol advertising (across multiple types of media)" as a highly cost-effective best buy policy option.

Finally, to counter the impact of alcohol industry activity online, governments should accelerate the adoption of policies offline, beyond the realm of marketing restrictions. WHO-SAFER interventions such as raising excise taxes on alcohol, strengthening restrictions on availability, advancing drink driving counter measures and facilitating access to screening and treatment of alcohol use disorder constitute cost-effective ways to curb existing alcohol harms and prevent potential consumption increases.

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Appendix 1: Glossary

Account Type
Identifies the type of social media account

Diversified company	Official page of a company that manufactures multiple kinds of products. Includes posts about a wide range of products, encompassing different types of alcoholic beverages and related items, as well as posts highlighting the employees or the company values.
Distilled spirits company	Official company page for a distilled spirits manufacturer. Posts may feature different products owned by the company, and employee highlights and company values.
Beer company	Official company page for a beer manufacturer. Posts may feature different beer product brands owned by the company, plus employee highlights and company values.
Wine company	Official company page for a winery or wine brand, showcasing different products, vineyard stories and company values.
Beer product brand	Social media pages of just one beer product brand. A beer company might own multiple product brands.
Distilled spirit product brand	Official company page for a distilled spirits product brand.
Wine product brand	Official company page for a wine product brand.
Alcopop product brand	Official company page for an alcopop product brand.
Third-party retailer: on-license vendors	Bars, pubs, restaurants, nightclubs or hookah lounges that promote alcohol for on-site consumption. Posts may include drink product specials, promotions and menu highlights.
Third-party retailer: off-license vendors	Liquor stores, supermarkets, vape shops and other retail outlets that sell alcohol for off-site consumption. Posts may focus on the availability of alcohol products, discounts and seasonal promotions.
Third-party retailer: company retailer	Retailers owned by the alcohol company primarily sell their own products, though they may also carry items like snacks, non-alcoholic drinks and accessories.
Brand-affiliated community group	These accounts are associated with alcohol products or companies and are created to build a network or a community of product users, or a community of people who are interested in particular activities or hobbies.
Front group	Organizations that claim independence but are established, funded or controlled by corporate interests. These groups have the strongest alignment with the industry.
Media: news or magazine	A social media account or platform managed by a news or magazine media outlet.
Media: radio or other media	A social media account or platform managed by a radio, TV or other media outlet.
Influencer	Social media personalities who promote alcohol brands or products through sponsored content, partnerships or personal endorsements. Individual journalists do not fit in this section.
Non-alcohol account	Refers to accounts that promote alcohol content through indirect association with marketing strategies, excluding directly affiliated brands, retailers, community groups, influencers and lobbying front groups. This category includes brand-extended products, surrogate marketing initiatives, and entities like sports pages that promote the brand under the guise of unrelated content.

Type of Product

Identifies the type of alcoholic beverage product being marketed

Beer	Produced from fermented grain (e.g., malted barley, rice, millet). Variants include low or "no-alcohol" beers, ice beer, dry beer, light beer and clear beer.
Wine	Produced from fermented fruits or berries, particularly grapes. Typically contains 10%-14% alcohol. Higher-alcohol products such as sherries, ports, cognacs and brandies may be classified as distilled spirits.
Distilled spirits	Alcoholic beverages produced through distillation to increase ethanol concentration. Raw materials vary and include grains and fruits.
Alcopops	Sweet, flavored alcoholic beverages resembling sodas, fruit juices, lemonade or tea. Also known as flavored malt beverages (FMBs), flavored alcoholic beverages (FABs), ready-to-drink beverages (RTDs), and "malternatives." Ciders were included in this category.
Non-alcohol product	Products from alcohol companies that are non-alcoholic, such as sugar-sweetened beverages, mineral waters and ultra-processed foods. May share branding with alcohol companies. Includes brand-affiliated community accounts that focus on lifestyle and sports topics.
Store promotion	Social media posts promoting retail stores without featuring specific products.

Marketing Tactic

Identifies the marketing strategy or approach used to promote the product
(Captures the intention of the marketing, for example, sell products, create brand endearment or loyalty)

Direct ads	Promotes an alcohol product directly, often showcasing images or details of the product itself.
Price promotion	Focuses on encouraging sales through discounts, product bundling, or offering free gifts with purchase.
Events, occasions, and sponsorships	A company's involvement in or sponsorship of events to promote its alcohol product.
Public relations	Highlights the company's brand, achievements, or recognition, focusing on its reputation and public image.
Corporate social responsibility	Focuses on the company's commitment to positive social, environmental, or community causes.
General PR	Intended to raise the profile of the brand/company but does not fall into any of the other categories (e.g., brand/company wishing a happy new year).
Brand extension	Refers to non-alcohol products produced by the alcohol company, using the company's trademark or logo.
Surrogate marketing	Promotes alcohol indirectly by advertising unregulated products that carry the brand's logo or name.
Community-based marketing	Engages a specific community or interest group through targeted communication and value exchange.

Message Framing

Identifies the type of underlying theme around which the whole message of the content is built

Secular community celebrations	Focuses on globally or nationally recognized holidays, events or social gatherings.
Entertainment	Positions the product as entertaining, using humor, memes or playful content.
Environmental/eco-awareness	Highlights the brand's commitment to sustainability and eco-friendly practices, addressing climate change or conservation.
Glamorization	Frames the product as luxurious, aspirational or part of a glamorous lifestyle, often using influencers or models.
Health claims	Claims that the product is healthier or less harmful than other alternatives in the market.
Informational	Provides details or instructions on how to use, buy or maintain the product, or shares company background information.
Personal care and wellness	Links the product to well-being, relaxation or stress management, often positioning it as a social or bonding tool.
Product features	Focuses on showcasing the specific attributes, flavors, designs or specifications of the product.
Social welfare	Highlights the brand's involvement in charitable causes, social programs or community development.
Religious events or imagery	Uses religious symbols or celebrates religious events in connection with the product.

WHO Definitions of Key Terms Used in This Report[1]

Alcohol Marketing: "Any form of commercial communication or message that is designed to increase, or has the effect of increasing, the recognition, appeal and/or consumption of" alcohol.

Corporate Social Responsibility: There are many definitions and conceptualizations of corporate social responsibility (CSR). For example, the U.N. Industrial Development Organization (UNIDO) presents CSR as a "management concept whereby companies integrate social and environmental concerns in their business operations and interactions with their stakeholders," implying a responsibility to "balance ... economic, environmental and social imperatives" with "addressing the expectations of shareholders and stakeholders" (Collin et al., 2021; UNIDO, 2021). The European Commission similarly defines CSR as "the responsibility of enterprises for their impacts on society," associating this with an obligation to "have in place a process to integrate social, environmental, ethical, human rights and consumer concerns into their business operations and core strategy." CSR is here viewed as aiming to maximize shared value for shareholders and society and as entailing businesses "identifying, preventing and mitigating their possible adverse impacts" (European Commission, 2011). The U.N. Global Compact organizes its account of the responsibilities of the commercial sector across 10 principles derived from international declarations and conventions about human rights, labor rights, environmental protection and anti-corruption (U.N. Global Compact, 2021b). The International Organization for Standardization (ISO) refers to social responsibility in its voluntary standard ISO 26000:2010, framing this responsibility as extending to organizations beyond industries and private firms. ISO 26000 defines "social responsibility" as the "responsibility of an organization for

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[1] Reducing the harm from alcohol by regulating cross-border alcohol marketing, advertising and promotion: a technical report. Geneva: World Health Organization; 2022. Licence: CC BY-NC-SA 3.0 IGO

the impacts of its decisions and activities on society and the environment, through transparent and ethical behavior that: contributes to sustainable development, including health and the welfare of society; takes into account the expectations of stakeholders; is in compliance with applicable law and consistent with international norms of behavior; and is integrated throughout the organization and practiced in its relationships" (ISO, 2017).

Cross-Border Marketing: Marketing that involves crossing a national or other jurisdictional border. In minimum terms, "cross-border" indicates that the message was disseminated/published from one jurisdiction and received by an audience at least part of which was in another country. However, marketing that is transmitted and received in the same country may often be cross-border in the sense that it was decided on, prepared or published in another country.

Direct-to-Consumer Marketing: The marketing of products by manufacturers directly to consumers, rather than via retail or wholesale intermediaries. For example, a wine producer may promote products that are available for purchase directly from that wine producer.

Marketing: "Any form of commercial communication or message that is designed to increase, or has the effect of increasing, the recognition, appeal and/or consumption of particular products and services. It could comprise anything that acts to advertise or otherwise promote a product or service." "Marketing" is also used to describe the whole process of deciding on, preparing and transmitting the communication or message.

Sponsorships: The provision of resources (e.g., money, people, equipment) by an organization directly to an event, cause or activity in exchange for a direct association with the event, cause or activity.

Targeted Marketing: A form of behavioral advertising. Targeted marketing uses the behaviors, interests and purchasing patterns of individual consumers to guide the creation of tailored advertisements.

Transnational Corporation (TNC): An organization "consisting of a parent company and its foreign affiliates, whose activities permeate national borders" which "is organized, integrated and coordinated by the headquarters operating in the home country" of the parent company.

Transnational alcohol corporation (TNAC): A transnational corporation that engages in the production, distribution, marketing and/or sale of alcoholic beverages.

Other useful definitions

Greenwashing: A form of PR or "corporate social responsibility" activity. The United Nations define greenwashing as a practice that businesses employ with the aim of appearing environmentally responsible. These campaigns can be misleading or deceptive as they promote false solutions to environmental and climate issues which can distract from and delay concrete and credible actions by government.

Appendix 2: Methodology

The methodology applied in the landscape report builds directly on the RESET Alcohol Canary monitoring system, which combines systematic digital media monitoring with standardized analytical frameworks to generate evidence on alcohol marketing practices. This approach enables the continuous identification, classification, and interpretation of alcohol-related promotional content across multiple online platforms. By integrating insights from real-time monitoring with structured data analysis, the methodology provides indicative evidence of both the scale and the narrative strategies of alcohol digital marketing in participating countries. In doing so, it bridges descriptive analytics and policy-relevant intelligence—providing governments and civil society partners with actionable information to strengthen regulatory and advocacy efforts.

Canary system

The Canary system is a digital framework for monitoring, classifying, and analyzing online marketing content of harmful products, including tobacco, alcohol, and ultra--processed foods. This report focuses on its application to alcohol marketing across multiple countries. The present landscape report summarizes one month of data collected March 1–31, 2025 from transnational companies and country-specific brands in Brazil, Mexico, the Philippines and South Africa, with the goal of mapping dominant marketing tactics, message framing strategies and brand presence. Accounts were sourced from both global corporate offices and national brand or subsidiary accounts for comprehensive representation of marketing practices.

The methodology uses a hybrid approach that integrates human expertise with AI-assisted content classification, implemented through a standardized, multi-phase process encompassing (1) systematic account selection, (2) automated data collection, (3) structured content coding with embedded quality assurance procedures, and (4) human-led data analysis supported by a visualization dashboard that continuously updates as new data are integrated. Each phase was guided by the official Canary codebook (a standardized reference guide that defines variables, categories, and coding rules used to classify and analyze digital marketing content within the Canary monitoring system), ensuring methodological transparency, reproducibility, and cross-country comparability.

This analysis provides a descriptive snapshot of publicly available social-media marketing activity. It does not estimate total market activity or population exposure.

1. Systematic account selection

The identification process followed a structured and iterative methodology designed for comprehensive coverage of the most relevant and active sources of digital alcohol marketing content. The process began with the compilation of a brand universe, consisting of major alcohol companies and brands operating in each participating country. This list was developed through consultation with subject matter experts and local research partners and validated through the review of national market share and industry intelligence reports, such as those published by Euromonitor International. This approach ensured that the selected brands accurately reflected dominant producers and distributors across beverage types, including beer, spirits, wine and local alcoholic beverages.

Once the brand universe was established, official/commercial and active social media accounts associated with these alcohol brands were identified across key monitored platforms, including Facebook, Instagram, X (formerly Twitter), and YouTube. TikTok was included despite platform restrictions that limit third-party access to public content and the lower number of commercially active accounts observed among identified brands. Each account was verified to confirm its authenticity—that it was an official or brand-linked profile—and to assess its level of activity and engagement, based on posting frequency and follower counts. Verified brand accounts, corporate parent profiles, third-party retailer and event sponsorship pages were prioritized for inclusion. Accounts were identified and validated in partnership with country teams based on their relevance to national alcohol markets and their alignment with the Canary alcohol codebook framework. A total of 200 accounts each in Brazil and Mexico, 250 accounts each in South Africa and the Philippines, and 60 global or transnational company accounts were selected. These accounts were configured within the Synthesio system to enable continuous and automated data collection of all publicly available content.

To complement account-based tracking and capture broader alcohol-related marketing content, Boolean keyword and hashtag searches were conducted using structured queries developed in collaboration with national

experts. These searches included both generic product terms (e.g., "beer," "vodka," "whiskey," "cocktail," "wine") and brand-specific keywords and hashtags (e.g., "#Heineken," "#Brahma," "#JackDaniels," "#JohnnieWalker," "#Corona-Sunsets"). Boolean operators such as AND, OR, NEAR, and EXCLUDE were applied to refine the searches and reduce false positives, increasing the precision of content identification.

All tracked alcohol brand accounts and keyword search terms were systematically documented in the official codebook for each country to ensure transparency and replicability. To maintain relevance and adapt to evolving marketing dynamics, the Canary research team in collaboration with the contracted agency conducts continuous reviews of all configured alcohol accounts and keyword queries in collaboration. This continuous review process enables the Canary system to remain responsive to new product launches, emerging digital platforms, and shifting promotional strategies within the alcohol industry. A complete list of monitored accounts can be provided upon request.

2. Automated data collection

Data were collected using the Synthesio platform, which automatically captures public posts from pre-selected accounts on a monthly basis. The dataset included all publicly accessible, organic marketing posts published by configured accounts, as well as posts identified through keyword-based discovery that directly or indirectly promoted conventional alcohol or new alcohol products during the study period. Due to platform restrictions—where third-party tools cannot access or extract content from accounts that are not directly tracked or authorized within the system—only original posts from accounts configured in the system were included in the analysis.

For linguistic and contextual relevance, only posts written in English or in the commonly spoken languages (Portuguese, Spanish, Afrikaans and Tagalog/Filipino) of each participating country were retained. Each post consisted of an image or a video, often accompanied by text, hashtags, or emojis. Duplicates, posts unrelated to alcoholic products, and inactive or deleted posts at the time of data cleaning were systematically removed to ensure the accuracy and validity of the final dataset.

2.1. Synthesio platform

Synthesio is an AI-assisted platform for monitoring digital media content, including social media and online news, with a particular focus on identifying indirect marketing through public relations and media stories. Operated by IPSOS CRED under contract with Vital Strategies, the Synthesio platform continuously captures data from social media platforms, online news sites, and video- or photo-sharing platforms on a daily basis. Each captured post or news article includes the original URL or link, relevant text excerpts from conversations or articles, and any associated visual content, such as photos or videos, that may be pertinent for subsequent analysis.

3. Coding and Classification

All posts were coded using the Canary alcohol coding framework, which includes type of account, type of product and two additional principal dimensions (see glossary for further information):

- Marketing tactic, based on the mode of brand promotion (e.g., direct ads, price promotion, events and sponsorships, corporate social responsibility, cobranding, community-based marketing, etc.).

- Message framing, based on the narrative used to shape audience perception (e.g., glamorization, informational, entertaining, health claims, secular community celebrations, personal care and wellness, environment-eco-awareness, etc.).

Coding on marketing tactic and message framing was conducted using a hybrid human–AI workflow designed for efficiency and accuracy across data:

- Step 1—Automated pre-classification: Posts were automatically categorized using the keyword classifiers from the Synthesio platform, built in collaboration with the Canary researchers.

- Step 2—Human quality control: Trained analysts from the Vital Canary team reviewed outputs, applying corrections and ensuring label precision, especially in ambiguous or context-specific posts.

- Step 3—Consensus validation: Discrepancies identified during quality control were discussed in internal review meetings and resolved using pre-defined decision-tree rules documented in the Canary codebook, ensuring methodological consistency across countries.

Quality control was embedded at all stages of data processing and coding to ensure accuracy, consistency and reliability. Automated validation scripts developed in Python were used to identify structural inconsistencies such as missing fields, duplicated posts, invalid fields or invalid variable fields. Detected errors were reviewed and corrected before analysis to maintain data integrity. In addition to automated checks, a random sample of 10%-20% of posts was manually re-coded by senior analysts to assess inter-coder reliability and evaluate alignment

with the established classification syntax. Posts with unresolved discrepancies were subsequently reviewed through structured consensus sessions, where analysts applied predefined decision rules to reach agreement. Insights from these discussions were used to refine the coding syntax and update keyword dictionaries, establishing an iterative feedback loop that continuously improved data quality and enhanced the accuracy of subsequent monitoring cycles.

4. Data analysis and visualization

Findings were synthesized into country-level scorecards and cross-market summaries to inform advocacy, policy engagement, and future surveillance activities, using Power BI dashboards. Analyses focused on the following dimensions:

- Descriptive analysis:
  - Overall volume of posts and engagement level across countries.
  - Frequency and distribution of posts by social media platforms, product brands and types of accounts.
- Content and Strategy Analysis
  - Distribution of marketing tactics and message framings by country, platform, and account type.
  - Identification of key promotional strategies, and recurring themes in alcohol promotion.
- Comparative analysis
  - Cross-country comparisons highlighting common global patterns and context-specific marketing strategies.

No statistical weighting or significance testing was applied; findings summarize observed patterns within the monitored dataset.

5. Ethical considerations

Only publicly available posts were collected and analyzed; no private or user-generated data were accessed at any stage. All analyses adhered to Vital Strategies' data ethics and privacy standards and were conducted in full compliance with platform terms of service.

6. Replicability and continuous improvement

Canary's methodology is designed to be scalable and replicable across different countries and product categories. Its flexible framework allows consistent application while accommodating local contexts and data environments. Continuous refinement is achieved through structured feedback loops with country partners so the system evolves in response to emerging marketing practices, platform innovations and analytical needs.

7. Limitations

The Canary framework is designed to collect and analyze representative examples of alcohol marketing to identify trends and patterns over time, not to provide a census of all industry activity. This analysis is based on one month of monitoring data and should be interpreted as an exploratory, descriptive assessment of alcohol marketing activity. The findings illustrate observable patterns within the reference period but are not intended for inferential or population-level generalization.

Data were obtained from publicly available social media content through predefined brand accounts and keyword-driven searches on selected platforms. Posts from private profiles, paid advertisements, and influencer-generated content not accessible via public APIs[2] were not included, which may result in partial coverage of marketing activity. Published content through external or partner accounts (e.g., event pages, media collaborators or influencer pages) rather than directly from the brand's main account is not captured by Synthesio. By configuration, Canary ingests only direct, original posts from verified or commercial brand, influencer, news and magazine accounts, and intentionally excludes tagged posts, comments, reposts and quote-reposts to maintain data integrity. Influencers and commercial accounts that promote alcohol but fall outside this scope are not captured by the system. As alcohol companies increasingly route promotion through such personal or lifestyle accounts, the dataset likely underestimates the full scale and reach of digital alcohol marketing. Moreover, platform-specific access restrictions—particularly for platforms such as TikTok—may have further influenced data completeness and representativeness. Some posts (e.g., from brand accounts using non-tracked keywords or languages) may also have been omitted.

Because data were drawn from selected brand accounts and a defined monitoring window, results should be interpreted as descriptive indicators of marketing presence and framing, not as inferential statistics or population-level estimates. Variations in overall marketing activity may reflect short-term promotional efforts by a few highly active brands, while others remain less engaged during the same period. The integration of multi-month and multi-country longitudinal data in future cycles will enhance trend analysis, cross-market comparability and methodological robustness. Finally, all analyses were descriptive in nature, and no inferential statistical modeling was applied. These results should therefore be viewed as illustrative indicators of digital marketing activity intended to inform the continued development of systematic, large-scale surveillance efforts.

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[2] API stands for Application Programming Interface. It is a set of rules or protocols that allow different software applications to communicate with each other to exchange data, features, and functionality.