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**THE IMPACT OF THE RESTRICTIONS ON ALCOHOL  
ADVERTISING ON CONSUMER DECISION MAKING IN  
ESTONIA**

Bachelor's thesis

Programme TVTB, specialization Marketing

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I hereby declare that I have compiled the thesis independently and all works, important standpoints, and data by other authors have been properly referenced and the same paper has not been previously presented for grading.

The document length is 9719 words from the introduction to the end of the conclusion.

Grete Elmi 11.05.2023

## **DISCLAIMER**

The author does not in any way endorse or recommend the consumption of alcohol with the given thesis. The aim of the thesis is only professional.

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## **ABSTRACT**

This thesis focuses on the effects of the restrictions on alcohol advertising on consumer decision making in Estonia. The research problem is lack of information on how to influence consumers' decision-making process when marketing communication of alcohol is majorly restricted by law.

Alcohol companies are no longer allowed to do advertising that plays on people's emotions but also, the levels of consumption have not dropped. The aim of this paper is to find out which factors have the biggest impact on consumers' alcohol purchase decisions today. This study is conducted to provide alcohol companies in Estonia beneficial information on the consumer decision making process and attitudes towards different channels of advertising.

As reference for the aspects of a consumer's decision-making process, the Model of Consumer Decision Making created by Schiffman and Kanuk (2007), is used. Data is collected using a structured quantitative survey to achieve the aim of the thesis. Respondents were analyzed in two groups based on their level of engagement on alcohol purchases and professional experiences. The data is analyzed using descriptive statistics, correlation analysis and T-test.

Main findings of the study prove that consumers with different levels of engagement differ in their decision-making process and behave differently towards various advertising forms. It was also confirmed that the age of the respondents and their experience regarding alcohol consumption in years, are in strong correlation. The thesis proposes that further research could be conducted with different engagement groups to see what other factors influence a consumer's level of engagement and attitudes.

Keywords: consumer decision making, alcohol advertising, advertising restrictions

## **INTRODUCTION**

For every brand and product, especially when being new on the market, it is crucial to be able to share knowledge about the brand and reach the right target group. Yet, launching a new brand is more difficult in some fields where for understandable reasons, restrictions have been imposed on communication and marketing.

Estonia has imposed increasingly strict restrictions on alcohol advertising over the last years. While the aim of this is to decrease the consumption of alcohol in the country, this also means that it has become increasingly more difficult to introduce new brands to the Estonian market. Studies also show that the consumption of alcohol has not decreased in Estonia since 2016 although during this time increasingly strict restrictions have been placed on advertising in the field.

Thus, the research problem is lack of information on how to influence consumers' decision-making process when marketing communication of alcohol is majorly restricted by law.

The aim of this thesis, therefore, is to find out which factors have the biggest impact on consumers' alcohol purchase decisions today. This thesis measures the current attitudes of consumers in Estonia and only focuses on showing the impact of currently allowed means of advertising.

To reach the aim of the thesis, two research questions were studied:

- 1) Which factors of the Consumer Decision Making model influence a consumer the most in Estonia while purchasing alcohol products?
- 2) Which channels of alcohol advertising, even in a restricted format, are most influential on a consumer's decision-making process?

The research tasks of the thesis are to define the possible factors in a customer's decision making process, study the alcohol market in Estonia regarding different companies, general consumption

and legislation and finally, conduct a survey to determine if alcohol advertising in a restricted format has any influence on alcohol purchases and to understand which factors influence a customer's decision making process and thus, could be used for sharing information on new brands while taking into account the current restrictions.

The author has conducted a quantitative survey based on a questionnaire. The questionnaire was developed by the author based on A Model of Consumer Decision Making by Schiffman and Kanuk (2007). Due to the fact that this model is very complex, the study concentrates on limited factors and relationships from this model only. The author used a convenience sample which included respondents who professionally work in the alcohol industry.

This thesis is written from the alcohol companies' point of view who want to educate their clients on different product categories and introduce new brands. The thesis offers alcohol companies an insight into the topic and helps to understand which methods to use and what influences customers the most. The concept of alcohol in this study is limited to distilled products and wine only.

The author wishes to enhance that the aim of the thesis is not to endorse or recommend the consumption of alcohol in any way. Understanding what influences a consumer's decision-making process when it comes to alcohol is mutually beneficial for both the health care system and the alcohol companies. The companies wish to educate their consumers more as well to promote the consumption of more expensive better-quality products instead of consuming low-quality products in a larger quantity. Through understanding the consumer's decision-making process, it is possible to focus on promoting more moderate and conscious ways of consuming different alcoholic products.

The thesis consists of three chapters. The first chapter gives an overview of the theoretical framework, providing an overview of the model used and the existing theoretical background on the topic. In the first chapter, possible factors that influence a customer's decision making are defined based on the model used. The second chapter provides an insight of the alcohol market in Estonia, giving an overview of the market shares and legislation and also discusses the importance of marketing in a consumer decision making process. The second chapter also introduces the research methodology used in the thesis and includes the sample description. The third and final chapter explains the research sample and presents the results of the research, additionally providing the author's discussions and proposals.

# **1. THEORETICAL FRAMEWORK**

This chapter gives a theoretical framework for the current thesis and is divided into three sub-chapters. The first sub-chapter focuses on consumer behavior, decision making process and the existing theories.

The second sub-chapter gives an overview of the Model of Consumer Decision Making that is used as the theoretical framework for the current bachelor's thesis. The third sub-chapter discusses the importance of advertising in the consumer decision-making process.

## **1.1. Consumer decision-making process**

As all markets are getting more competitive and the variety of products is broadening daily, it is becoming increasingly more important for brands to understand the most efficient ways to reach their target audience. One of the keyways for achieving this is by studying and understanding consumer behavior and through this, the consumer decision making process. The concept of consumer behavior has developed a lot over the last decade (Schiffman & Kanuk, 2007) as years ago it was used as the term to describe how a buyer makes the decision of purchase. Now, a consumer is considered to be someone who identifies a need or desire, makes a purchase, and then disposes of the product (Solomon, 2019). “The field of consumer behavior covers a lot of ground: It is the study of the processes involved when individuals or groups select, purchase, use, or dispose of products, services, ideas, or experiences to satisfy needs and desires (Solomon, 2019).” Thus, today's consumer decision making process consists of three steps instead of just one and these include the process before, during and after the purchase.

Most models of consumer decision making use similar steps to measure the process, for example need; recall; search; evaluating options; buying (East *et al.*, 2017) or problem recognition; information search; alternative evaluation and selection; outlet selection and purchase and post-purchase processes (Hawkins & Mothersbaugh, 2013). Another model has also defined these steps as antecedents of need; need being recognized; information being sought; pre-purchase evaluation

of alternatives; final choice and purchase; consumption; post-consumption evaluation (Blythe & Sethna, 2016, p.75).

There are several different schools of thought when it comes to understanding and analyzing consumer decision making. Most theories firstly divide consumer decision making into different levels based on the level of effort a consumer puts into them. Schiffman and Kanuk have called these levels the extensive problem solving, limited problem solving and routine response behavior levels. Alternations of the same type of levels include for example extended problem solving, limited problem solving and habitual decision making (Solomon, 2019).

There are different schools of thought also when it comes to models of consumers which refer to a general view or perspective as to how and why individuals behave as they do (Schiffman & Kanuk 2007). Some authors, for example, have divided the levels into cognitive, reinforcement and habit models. In this case, the cognitive model assumes rationality and evaluation of alternatives where marketers can influence a consumer's opinion. The reinforcement model represents the idea of a consumer's choices being controlled mostly by their environment and the habit model suggests that the choices are controlled by managing stimuli and that the consumer relies on past experiences. (East *et al.*, 2017) Four different views have been taken into consideration for creating the model used for this thesis: an economic view, a passive view, a cognitive view, and an emotional view (Schiffman & Kanuk 2007).

The economic view represents a consumer who can make only rational decisions and this view is mostly used in the field of theoretical economics which portrays a world of perfect competition. The passive view is considered the opposite of the economic view, as it depicts a consumer to be completely submissive to the interests and efforts of marketers. The cognitive view portrays the consumer as a problem solver who is receptive and actively searching for products or services to fulfill their needs thus solving their problems. The emotional view is something marketers often try to overlook when in reality every consumer is in some aspect led by their emotions. Shopping has been considered fulfilling of three fundamental human needs: autonomy, competence, and relating to others thus, the satisfaction of these needs plays an important role in overall subjective well-being or happiness (El Hedhli *et al.*, 2013). It has been found that when a consumer makes an emotion-led decision, they are less likely to do pre-purchase research and are more likely to rely on their previous experiences and associations with the product or service. All given views are considered important but, in this thesis, the Model of Consumer Decision Making that has been

used, focuses mainly on the cognitive and briefly on the emotional view. (Schiffman & Kanuk, 2007)

There is also a different approach that separates consumers into different groups based on their style of consumer decision making (Rezaei, 2015). It has been found that shopping decisions are often affected by consumers' mental orientations reflected in the consumer-decision making styles so understanding the role of consumer-specific characteristics in shaping shopping well-being is fundamental (Maggioni *et al.*, 2019). Decision-making styles are described to be stable, trait-like patterns of approach to situations that need a decision (Driver, 1979). Understanding and knowledge of consumer decision making styles is considered essential in marketing efforts like market segmentation, positioning, and marketing strategies which are all necessary for market segmentation strategy (Rezaei, 2015). As this is one of the more recent approaches, it has been considered to lack an “established theoretical framework” but it has still been increasing over the last decade (Dewberry *et al.*, 2013).

One of the models considered to be the most comprehensive currently available concluded that the seven dimensions are necessary to represent the fundamental structure of a decision-making style: spontaneous, dependent, vigilant, avoidant, brooding (often referred to by others as regret), intuitive, and anxious (Leykin & DeRubeis, 2010). Another study on consumer decision making styles concluded that perfectionist, brand conscious and fashion-conscious consumers are advertising oriented; price conscious and impulsive consumers are price oriented; perfectionist, price conscious, recreational and impulsive consumers are product oriented and perfectionist, price conscious, and impulsive shoppers are retail oriented (Rezaei, 2015). As online stores and marketing channels are rapidly growing, it is becoming increasingly more important to also understand if and how a consumer's decision-making styles are different online and offline. A separate model to compare the differences is yet to be created but distinct differences between the two have already been established. (Rezaei, 2015)

## 1.2. A Model of Consumer Decision Making

For the basis of this thesis, the author chose the Model of Consumer Decision Making (Figure 1) by Schiffman and Kanuk (2007) as it includes very aspects of the decision making process. Schiffman and Kanuk have explained that the model has been designed to synthesize and coordinate relevant concepts into a significant whole.

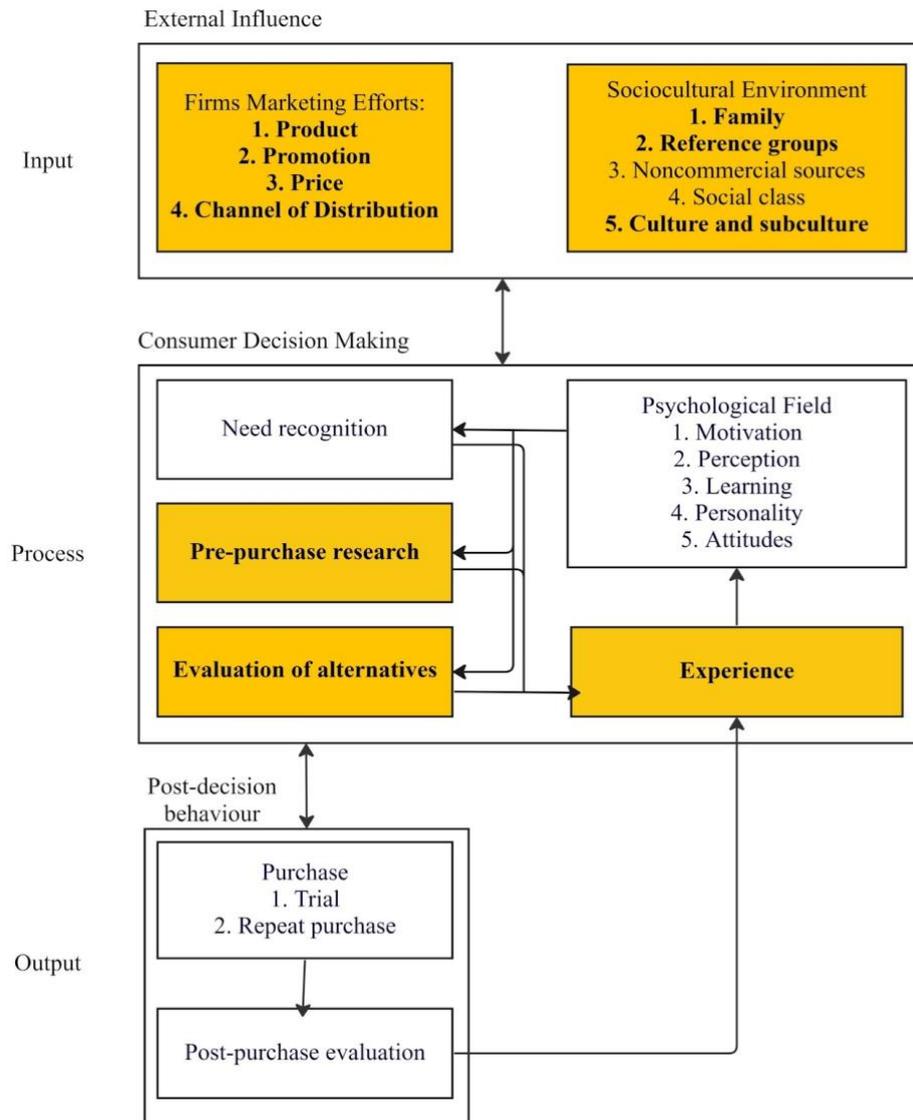


Figure 1. A Model of Consumer Decision Making: coloured boxes and text in bold mark the factors that the thesis focused on  
Source: Schiffman and Kanuk (2007)

It has been brought out as a benefit of the given model that it does not aim to take in complex decisions, but rather to simplify the approach to decision-making. However on the other side, it is

also so extensive, that it can cover not only simple decisions but also complex ones. (Reina Paz & Rodríguez Vargas, 2023) This model has been used to research consumer decision making processes also because it takes into account many types of both rational and irrational variables from pricing to different reference groups and a consumer's personal motives and perceptions (Cetinã *et al.*, 2012). Additionally, as the authors have divided consumer decision making into different stages, it has been brought out as a benefit of the model that it can measure the changes in a consumer's preferences between the stages as well (Yap & Yazdanifard, 2014).

The process of decision making has been explained as a three-step process. In the model used, these stages are described as interlocking and are called the input stage, the process stage, and the output stage. The input stage draws on external influences that serve as sources of information for the consumer and influence a consumer's product-related values, attitude, and behavior. There are two key elements in this stage, firstly, the marketing and communication activities of the organization selling the product or service and secondly, the nonmarketing sociocultural influences, which, when internalized, might also affect the consumer's decision making. (Schiffman & Kanuk, 2007)

The process stage focuses on how consumers actually make decisions. Schiffman and Kanuk have explained: "The *psychological field* represents the internal influences (motivation, perception, learning, personality, and attitudes) that affect consumers' decision-making processes (what they need or want, their awareness of various product choices, their information gathering activities, and their evaluation of alternatives)." The consumer decision making act thus consists of three stages: need recognition, pre-purchase search, and evaluation of alternatives. Need recognition is mostly explained through the consumer being faced with a "problem" which needs to be solved with a product or service. The consumer then moves on to the next phase which is the pre-purchase search. The consumer usually firstly relies on past experiences but when that information is very limited, will turn to external sources of information. Once information has been gathered, the consumer will most commonly evaluate a list of suitable alternatives based on a criterion they will have chosen. (Schiffman & Kanuk, 2007) On the other hand, it has also been found that in majority of the decision-making circumstances, consumers hardly entertain the adequate degree of information gathering as it would become tiresome practice if all buying decisions entail the need for extensive effort and the purchase process would hardly bring enjoyment or freshness to a buyer (Sofi & Nika, 2017).

The output stage of the decision-making model concerns two closely associated types of post-purchase activity: purchase behavior and post-purchase evaluation. Regarding purchase behavior, types of purchases have been divided into three categories: trial purchases, repeat purchases and long-term commitment purchases. (Schiffman & Kanuk, 2007)

The given model was chosen for the thesis as it is multifaceted and represents many different important aspects of the consumer decision making process. As the model is very complex, the author chose to use only a limited number of factors from the model to match the aim of the research.

### **1.3. The importance of marketing and advertising in consumer decision making process**

Overall, marketing handles identifying and meeting human and social needs (Kotler & Keller, 2006). It can be broadly described as a channel of communication between the targeted consumers and a product or service. It is important to keep in mind that marketing is not about selling a product but more about identifying a consumer's needs and understanding if and how the product or service could meet those. (Lee, 2013) Even as consumer behavior has become increasingly more complex and multidimensional (Hawkins & Mothersbaugh, 2013), marketing has remained one of the main channels for influencing consumer decisions. *“Successful marketing decisions by firms, nonprofit organizations, and regulatory agencies require an understanding of the processes underlying consumer behavior (Hawkins & Mothersbaugh, 2013).”*

In the model used for the thesis, marketing mostly consists of product, promotion, price and place or channel of distribution. This is the common marketing mix, also known as the four Ps of marketing. *Product* or service consists of the features, designs, brands, packaging, and the post-purchase benefits. The *price* includes list price, discounts, campaigns, and payment methods. The *channel of distribution* represents the distribution in retail and online. The *promotion* factor considers all advertising, sales promotions, public relations, and other efforts designed to build brand awareness and demand for the product. (Schiffman & Kanuk, 2007) All of the above-mentioned factors aim to influence consumers in some way and help to appeal to different types of consumers. Price-related advertising mostly appeals to price sensitive consumers for example

while other advertisements are created to influence a specific cultural class who is very aware of trends and wants to be a part of a certain social class (East *et al.*, 2017).

An important part of the marketing mix, also focused on in the thesis, is advertising, which is a sub-category of promotion. It is important to note that advertising cannot be used in isolation and is often used as a supporting method to sales promotion or direct marketing activities. Advertising is often defined as mass, paid communication that is used to transmit information, develop attitudes, and bring about a response from the consumer. (Palmer, 2000) Advertising is considered to be a cost-effective way of communicating brand messages both for building brand preference and educating consumers (Kotler & Keller, 2006).

Advertising has been divided into four different types and defined by Kotler and Keller (2006) based on their objectives. Firstly, informative advertising, which aims to build brand awareness and brand knowledge both for new products and for the new features of existing products. It has been found that when consumers' awareness about a brand and its products increases, the consumers tend to seek for more information about it online and then assess the benefits of choosing that brand over those of competitors prior to making a buying decision (Sharma *et al.*, 2021). Secondly, persuasive advertising, that focuses on creating liking and preference and through that, purchase of a product or service. Thirdly, reminder advertising is often used as a means of stimulating a repeat purchase. Lastly, reinforcement advertising aims to reassure current purchasers that they made the right decision. When a consumer is content with their purchase, there is a higher chance they will also influence others through the experience by sharing their opinions through online reviews, comments and spreading word-of-mouth recommendations (Liu *et al.*, 2021). Research has found that brand trust is most likely to be reinforced by exposing consumers to the information about product or service quality and brand values enough times (Warren *et al.*, 2014) which means these four types of advertising work especially well when used together.

## **2. MARKET BACKGROUND AND RESEARCH METHODOLOGY**

The second chapter of the thesis is divided into three sub-chapters. The first sub-chapter introduces the alcohol market in Estonia giving an overview of the main companies. The second sub-chapter focuses on alcohol advertising, its aims and legal limitations in Estonia. The third sub-chapter gives an overview of the research methodology used in the thesis.

### **2.1. Overview of the alcohol market in Estonia**

Alcohol is most commonly divided into two large groups by method of production - distilled and undistilled products. Distilled products include all spirits and liquors and undistilled products are considered to be wine, beer, cider and other products where the volume of alcohol remains below 22% (Riigikogu, 2002).

There are 11 bigger alcohol producers and importers in Estonia when it comes to distilled products and wine. These companies have formed a non-profit organization called the Alcohol Producers and Importers Association. The association includes the following members: Anora Estonia AS, Pernod Ricard Estonia OÜ, Liviko AS, Remedia AS, Amber Distribution Estonia OÜ, Estonian Spirit OÜ, Prike AS, Tridens AS, Coca-Cola HBC Eesti AS, Balmerk Estonia OÜ and Moe OÜ. These companies make up 69% (see Figure 2) of the Estonian distilled products and wine market. In 2021, they generated 470 million in turnover together with the domestic and international sales, paid more than 180 million euros in taxes and offered jobs to more than 600 people. (Alcohol Producers and Importers Association, 2022) In 2021, the revenue generated from alcohol sales in Estonia overall, including beers and ciders, was 439 million euros out of which 304,5 million was generated by the members of the association (Estonian Institute of Economic Research, 2021) and (Infopank, 2022).

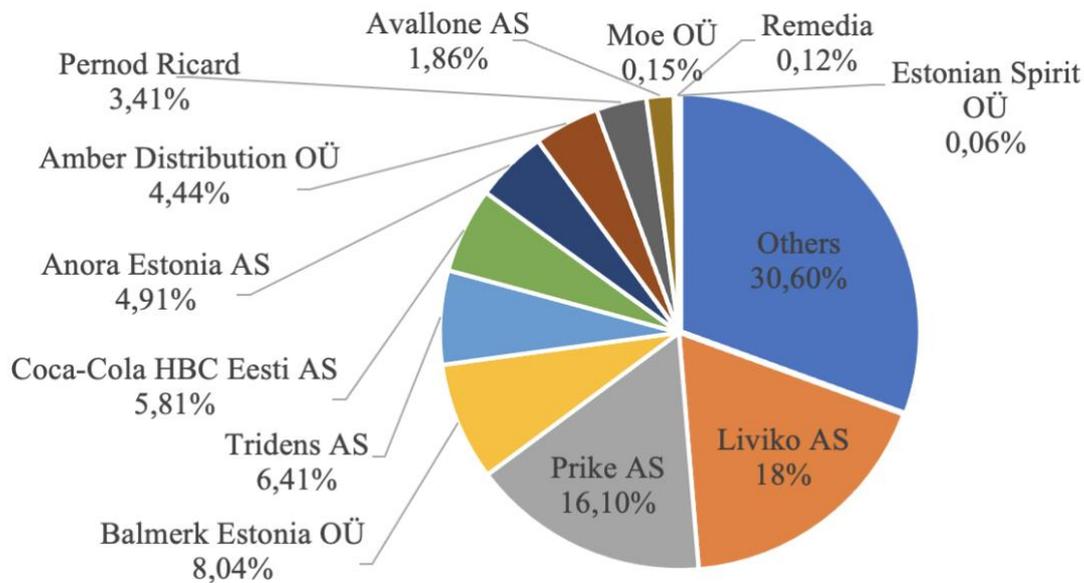


Figure 2. Overview of the alcohol market shares in Estonia in 2021

Source: figure created by the author based on Estonian Institute of Economic Research (2021) and Infopank (2022)

One of the main goals of the organization is to promote reasonable consumption of alcohol, where it is also necessary to understand which channels work best when it comes to consumer decision making. The member companies of the organization work towards having more conscious consumers and thus the organization has cooperated with the Estonian Bartenders Association and the Estonian Sommelier Association to spread the message of wise and moderate consumption also in retail stores, bars, nightclubs, and restaurants. (Alcohol Producers and Importers Association, 2022)

In addition to conscious consumption, there are other topics like innovation in product development, sustainability and product values in general that are highly valued when it comes to alcohol manufacturing and importing but due to current laws, the companies are not able to communicate this type of information. Another similar topic is the quality of different products as it is allowed to promote conscious consumption, but it is not allowed to communicate why prefer one product to another.

## **2.2. Overview of alcohol advertising and its restrictions in Estonia**

The aim of alcohol advertising is the same as in any other field which is to spread information about a specific product or service. Advertising is necessary to bring new products and services on the market and to also share information to consumers regarding already established products.

The World Health Organization has assessed that once the limit of 6 liters of pure alcohol per capita is exceeded, the risk of serious damage to health may increase rapidly (WHO, 2018). In Estonia, the average consumption of pure alcohol between 2011 and 2021 has been 10,1 liters per capita (Tervise Arengu Instituut, 2021). When studying the frequency of alcohol consumption, it was found that in 2021, regarding wine, 54% of the respondents consumed it a few times a year, 20% consumed it monthly and 11% weekly. Distilled drinks were studied separately as the vodka consumption is quite high in Estonia. In 2021, 30% of people responded to drinking vodka multiple times a month, 18% admitted to drinking vodka 1-3 times a month and 2% consumed daily. Regarding other distilled drinks, most people (48%) responded to consume these products yearly, while 18% were monthly consumers. (Estonian Institute of Economic Research, 2021)

Due to a high rate of alcohol consumption in Estonia, strict restrictions have been applied to alcohol advertising. Alcohol advertising may only include the following elements concerning the product: name; type; manufacturer's name; trademark; country of origin; geographical area; ethanol content in percent by volume; image of sales packaging; properties (color, aroma, taste); serving suggestion. (Consumer Protection and Technical Regulatory Authority, 2022) Additionally, many places for alcohol advertising have been completely prohibited like buildings meant for sports, health care and for example also cinemas and museums. The aim of the restrictions is to make sure alcohol advertising is neutral, does not create any positive associations and does not deliberately push consumers towards making an impulsive purchase. (Advertising Act of Estonia)

The last major changes to the advertising law regarding alcohol advertising were made in 2018 (Ministry of Social Affairs, 2018). These changes prohibited for example the use of people in advertising, outdoor advertisements, most social media advertisements while excluding the social media channels of the alcohol manufacturer, importer, and the dedicated social media channels of the alcohol brands. (Advertising Act of Estonia) Many other smaller changes were also made, all targeting the high consumption level in Estonia.

While these changes are justified, they also limit the possible ways of sharing useful information that would help to educate the consumer and would thus in return help bring down the level of consumption. An interesting trend was discovered during a study on alcohol consumption among the population in Estonia. Between 2005-2020 the support for strict alcohol advertising restrictions was growing, but in 2021, it was at the lowest level (26%) since 2004. Most people (48%) supported an advertising policy with only limited restrictions and 11% were in support of a liberal policy regarding alcohol advertising. (Estonian Institute of Economic Research, 2021) Alcohol manufacturing and importing is a business as any other, where new brands are brought to market each year, meaning the companies need to be very resourceful with the channels of advertising that are still allowed.

### **2.3. Research methodology**

The aim of the thesis was to find out which factors have the biggest impact on customers' alcohol purchase decisions today and if the few advertising methods that are allowed but restricted have any effect on a consumer's decision making. The research of the thesis focuses specifically on distilled products and wine as these are the product categories where most new brands are brought on the market yearly. To identify, what influences consumer's decision making the most, two research questions were studied:

- 1) Which factors of the Consumer Decision Making model influence a consumer the most in Estonia while purchasing alcohol products?
- 2) Which channels of alcohol advertising, even in a restricted format, are most influential on a consumer's decision-making process?

To answer these research questions, the author used quantitative research as the research methodology. A structured quantitative survey was chosen based on two justifications. Firstly, structured quantitative survey was an effective method that helped to assure the neutrality and precision of the answers as the respondents had a limited amount of different possible answers given in the survey to choose the most suitable response for them. Secondly, with quantitative research as opposed to qualitative research, the author has no influence on the respondent thanks to the anonymity of the survey, the answers are more precise and can be interpreted one-

dimensionally (Black, 1999). Also, the structured quantitative survey helped to answer both research questions and solve the research problem.

The author used the Model of Consumer Decision Making (Schiffman & Kanuk, 2007) as a basis for the study. A limited version of it was used as the model is complex and includes many factors which would make the survey very extensive, making it difficult to correctly achieve the aim of the thesis.

To measure consumer decision making process, the author of the thesis prepared a questionnaire and collected primary data through a survey. The questionnaire was divided into 4 separate sections as seen in Appendix 1 and the results of the questionnaire are presented in Appendix 2. The total number of questions in the survey was 15 but the author had implemented a feature that filtered certain questions based on the answers that the respondent provided. This feature was used as the author wanted to filter out people who mostly consume beer and cider as the marketing for these products is quite different. It is different due to the fact that many products in these categories have non-alcoholic variations with the same product design and the companies can thus do very different types of marketing through the non-alcoholic versions of the products.

The author used non-probability sampling for the current survey. Convenience sampling was chosen due to the restricted time frame, its accessibility and to make sure the sample includes both high and low participation rate respondents (Wolf *et al.*, 2016). An online survey was chosen as a quick method as the author aimed for a large number of answers in a limited amount of time. An online survey is easier to spread through different social media platforms and via email. The questionnaire was created with Google Forms and was conducted anonymously to make sure the answers would be honest. The questionnaire was tested on 4 people including the supervisor of the thesis and necessary changes were made according to the feedback that was given. The data was collected over the course of two weeks between 14.11.2022 - 27.11.2022 and the survey generated 129 answers.

The first section of the survey introduced an overview of the survey itself, stating the data will be used purposefully only for the current study and that the answers are anonymous. In addition, this section also included a disclaimer stating that with this study, alcohol consumption is in no way promoted or endorsed. The first section also included a question to seclude all underage respondents.

The second section of the survey collected background information about the respondents. The first question in this section investigated if the respondent works in the alcohol industry to understand how a higher engagement rate changes a person's outlook on alcohol advertising. The second question in the section focused on different types of alcohol thus when a respondent answered they mainly purchase beer and/or cider, the questionnaire ended for them. The last question of the section focused on the frequency of purchases. When the respondent answered that they purchase alcohol less than once a year, the questionnaire also ended for them.

The third section covered the consumer decision making process. These questions investigated the number of years during which a person has been consuming alcohol; if they consider themselves to be more or less open to purchasing new products; how much pre-purchase research they do; how they rate the amount and availability of information regarding new and old brands and a set of questions regarding alcohol advertising, the visibility and channels of it and which forms of advertising they find pleasant or on the opposite, unnecessary. The final section of the questionnaire covered the demographic questions about age and gender.

After conducting the survey and gathering the results, data cleansing was implemented. For demographics, all respondents who had answered all the questions correctly were considered. Due to the fact that the advertising for beer and cider widely differs from the advertising of wine and hard liquor, the questionnaire ended earlier for those respondents who chose beer and cider as their primary product to consume. To ensure the reliability of the further analysis, only the results of those respondents, who chose wine and hard liquor as their main choice, were analyzed.

To analyze the results of the survey, the author used mean as a central tendency measure, comparative analysis, correlation analysis and t-test in the thesis. For finding out the relationship between a respondent's age and the length of their experience in purchasing alcohol, Spearman's rank correlation coefficient was used. This method is used for monotonic increasing or decreasing pairs of variables. This means that as the age of the respondent increases, the length of their experience also increases. Since all data is considered to be ordinal, the requirement of linearity is not important (Black, 1999). The correlation analysis included both the respondents in the high engagement group and in the low engagement group.

Comparative analysis was used to compare the results of two engagement groups. The ratio of each answer for each question for both groups was calculated, showing the differences between two engagement groups. Also, benchmarking is useful when identifying the factors that have higher influence for each group.

T-test is used for comparing two groups based on a same trait to identify whether they are sufficiently similar to belong to the same population. The two groups have both similar and different characteristics and when conducting the t-test based on one trait, it helps to assess if they should statistically fall under the same population (Black, 1999). For the t-test not to be modified, the samples must be independent, the homogeneity of variances must exist, and the samples must be large and equal. If at least one of these conditions is not met, the test must be modified (Black, 1999). For this database, all the above-mentioned conditions are met and a two-tailed t-test was chosen because of two independent samples. Also, a two-tailed test helps to identify whether a difference between the means of two groups exists. The data is homoscedastic, meaning that the variances for high and low engagement groups' results are similar. For t-test two hypotheses were set:

H0: The means of high and low engagement group are equal.

H1: The means of high and low engagement group are not equal.

The t-test outputs were compared with the critical values from the t-distribution table. Degrees of freedom were calculated based on the number of observations to describe the number of observations that may vary without affecting the result. The degrees of freedom are necessary to use, since sample statistics are used to estimate population parameters. The level of significance of 95% was chosen for this analysis.

## **2.4. Sample description and building comparison groups**

The sample study consisted of 129 respondents of which 79 (61%) were female, 49 (38,3%) were male and one person (0,7%) preferred not to specify their gender. Since all respondents answered all the questions in the survey correctly, after data cleansing, the number of respondents remained 129. Out of 129 respondents, 25 (19,4%) answered to be working in the field of alcohol manufacturing, importing and/or sales.

In the survey, age was an open question and the range was from 19 to 72 years of age. Due to alcohol law, it was assured with the first question that all respondents are of age, thus the lowest possible age of respondents could have been 18. The respondents were divided into 4 larger groups for illustrative purposes (see Figure 3). The age ranges were selected based on previous studies on alcohol consumption (Di Serio *et al.*, 2022). The mean age of the respondents came to be 42 years. Compared to the population of Estonia, the age demographic of this study is not representative as it is not aligned with the current demographic of Estonia. The age range with the most people in Estonia is between 30 and 40 but in the thesis survey, the ages have spread out more evenly (Statistikaamet, 2022). Figure 3 illustrates the age demographic of the current study.

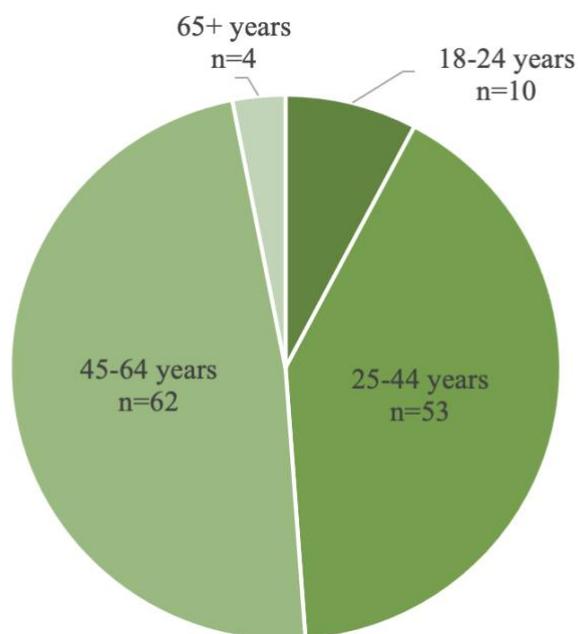


Figure 3. Age demographics (n=129 respondents)

Source: figure created by the author based on the results of the survey

When it was asked how frequently the respondents purchase wine and/or distilled alcoholic products, it turned out almost 77% of people purchase alcohol between once a year to once a month and only 23% said to purchase alcohol more frequently than once a month. The following figure (see Figure 4) presents the respondents purchase frequency.

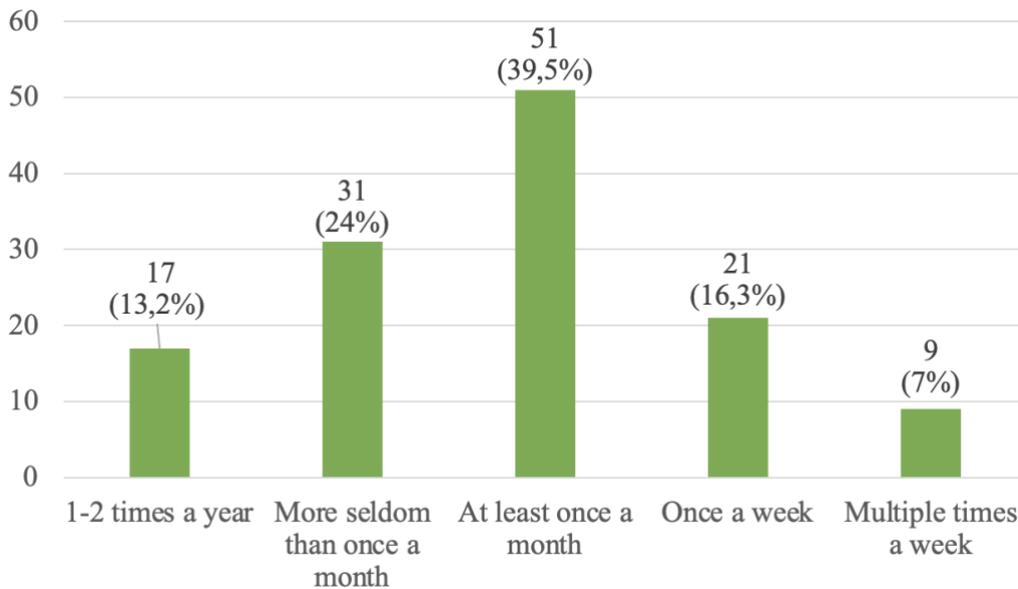


Figure 4. Purchase frequency (n=129 respondents)

Source: figure created by the author based on the results of the survey

The survey also included a question about the respondent's first purchase preference when it comes to hard liquor, wine and beer or cider. The aim of this question was to eliminate people whose first preferences are beer or cider as the marketing for these product categories largely differs from distilled products and wine. After the purchase preference question, only the 101 respondents remained in the survey who had answered for their purchase preference to be hard liquor or wine as seen on Figure 5.

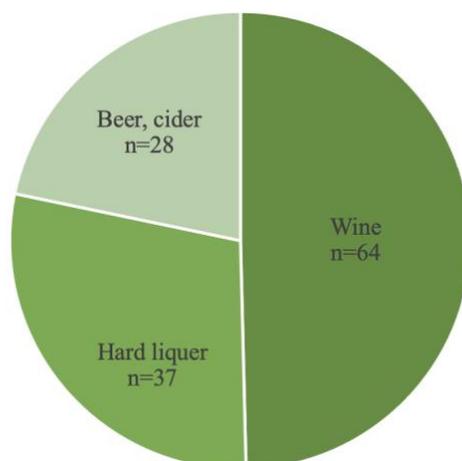


Figure 5. Purchase preferences (n=129 respondents)

Source: figure created by the author based on the results of the survey

The respondents were divided into two groups based on their level of engagement. The high engagement group consisted of all the people who responded to be working in the field of alcohol manufacturing, producing or sales which was 19 people after eliminating the respondents who chose beer and cider as their first purchase preference. Additionally, the people who responded to purchase alcohol either monthly, weekly, or multiple times a week were also added to the group with a high engagement as their exposure to alcoholic products is relatively high.

The low engagement group consisted of all respondents who stated to purchase alcohol either 1-2 times a year or more seldom than once a month. The demographics of the engagement groups are shown on the following table (see Table 1).

Table 1. Demographics in the high and low engagement group

|               | High engagement group;<br>n=66 | Low engagement group;<br>n=35 |
|---------------|--------------------------------|-------------------------------|
| Female        | 62%                            | 61%                           |
| Male          | 36%                            | 39%                           |
| Not specified | 2%                             | 0%                            |
| Mean age      | 40                             | 45                            |

Source: table created by the author based on the results of the survey

The high engagement group was larger and consisted of 66 people. The low engagement rate group consisted of 35 people. Regarding demographics, the high and low engagement group were divided quite equally when it came to the ratio between men and women as seen on Table 1. The mean age was 5 years higher in the low engagement group.

### 3. EMPIRICAL RESEARCH ABOUT THE EFFECTS OF THE RESTRICTIONS ON ALCOHOL ADVERTISING IN ESTONIA

The third chapter of the thesis provides an overview of the results of the study. Finally, a discussion on the results and the author's proposals are provided.

#### 3.1. Results of the survey

Regarding the Model of Consumer Decision Making used for the thesis research, selected factors of the model were focused on in the analysis to achieve the aim of the study. Firstly, the study thus focused on the firm's marketing efforts which include price policy, the product itself, distribution and the promotional methods used. Secondly, the process of searching for information and the evaluation of alternatives was measured. Lastly, the research also studied the psychological aspects that may influence a consumer's decision-making process.

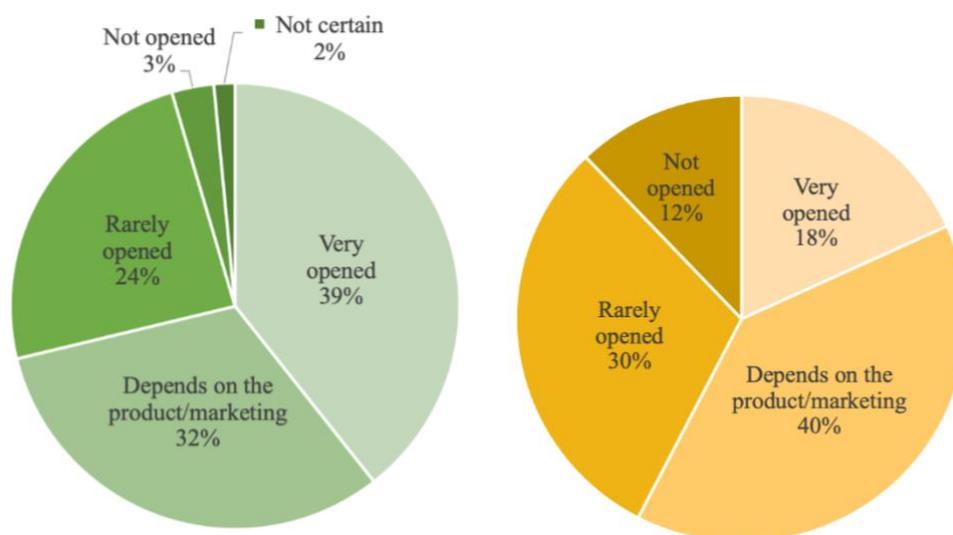


Figure 6. Openness to new products: high engagement group (left; n=66); low engagement group (right, n=35)

Source: figure created by the author based on the results of the survey

Openness to new products was included in the questionnaire to find out how and if this could influence a consumer's decision making. Figure 6 shows a comparison between high and low engagement group respondents when it comes to the openness to new brands and products. The high engagement group is remarkably more open to trying new products as 71% of them answered

to be very open to new products or open dependent on the marketing or product. In this group, the amount of people who admitted to being not at all open to new products is very small (3%). In the low engagement group, the openness to new products was lower as 42% responded as rarely opened or not at all open to trying new products whereas the amount of people replying not at all open was 4 times higher (12%) than in the high engagement group.

To find out the factors that influence a consumer's alcohol purchase the most, firstly, pre-purchase research and the willingness to do it, was studied. When studying the pre-purchase research willingness, the high engagement group stood out with a much larger number of respondents admitting to research products before purchase (39%) while the same number in the low engagement group was significantly lower (14%) as shown on Figure 7. The percentage of people who admitted to choosing at the store and deciding between familiar products was almost the same in both groups - 31% in the high engagement group and 32% in the low engagement group. The groups largely differed in the amount of people who responded to doing no research and choosing between all available products at the store, not just the familiar ones, being 16% in the high engagement group and 30% in the low engagement group. It could be concluded that for people with a low engagement, in-store advertising and price campaigns could be more useful while for consumers with high engagement, providing enough information for pre-purchase research could be vital.

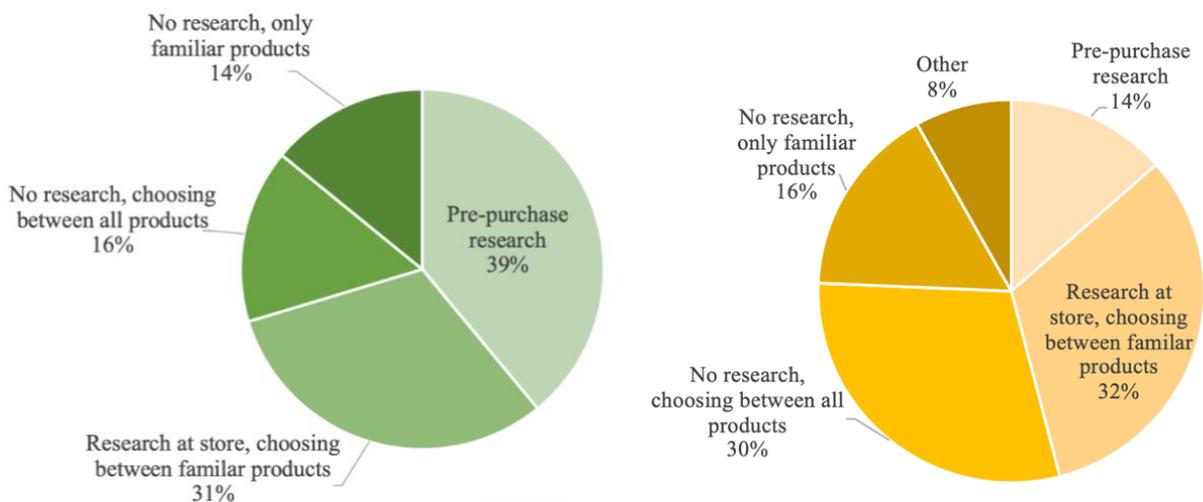


Figure 7. Pre-purchase research willingness of high engagement group (left; n=66); pre-purchase research willingness of low engagement group (right; n=35)  
 Source: figure created by the author based on the results of the survey

Secondly, an important part of studying the key factors in consumer decision making, was finding out the channels which consumers use for pre-purchase research. As in the survey, the question about preferred channels for finding information was with multiple answers, all respondents were able to pick the channels they personally found suitable. The interesting trend here came to be that in the high engagement group, respondents chose 1,2 channels on average while respondents in the low engagement group chose 2,3 channels on average. The following graph presents the results regarding preferred channels (see Figure 8). The high engagement group opted for more online channels of information while the most popular answer in the low engagement group came to be recommendations from friends and family and the second most popular came to be the webpages of the retail stores. This again supports the idea of targeting advertising related to distribution channels and pricing to the low engagement group. The high engagement group expects information to be available online and easily found as they prefer to use less channels for information gathering, whereas the low engagement relies more on recommendations and the information of the store.

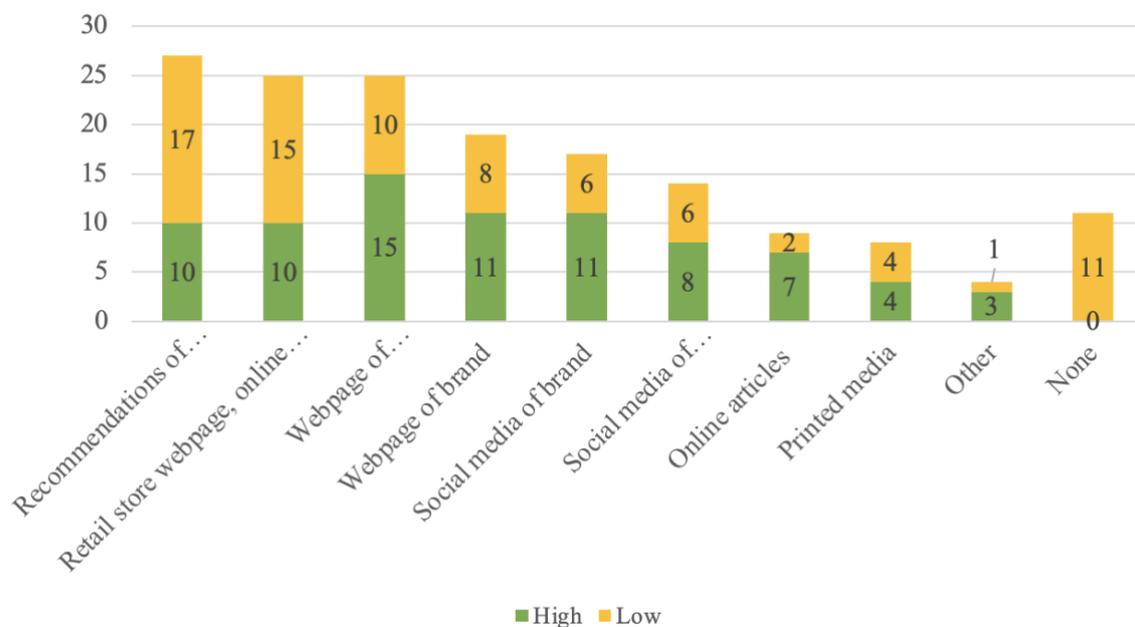


Figure 8. Preferred channels of finding information about products, left (green) stacks represent the high engagement group, right stacks (yellow) represent the low engagement group  
Source: figure created by the author based on the results of the survey

When studying the availability and amount of information, new and established brands were compared in both groups as the restrictions on advertising have become stricter over the last 10 years and brands are allowed to spread less information now compared to established brands that

came to market more than 10 years ago. Regarding new brands, the respondents of the high engagement group were noticeably more critical of the amount and availability of the information (see Figure 9). It can be concluded that for the high engagement group there is not enough information, and it is difficult to find when it comes to new brands. For the low engagement group respondents, almost half (42%) answered to have no opinion and the majority (39%) of the rest answered to have a sufficient amount of information. Only 20% of the respondents thought that there is not enough information, or it is hard to find. This also supports the previous question of pre-purchase research where the trend was that the low engagement group does remarkably less research and thus also has a lower need for information.

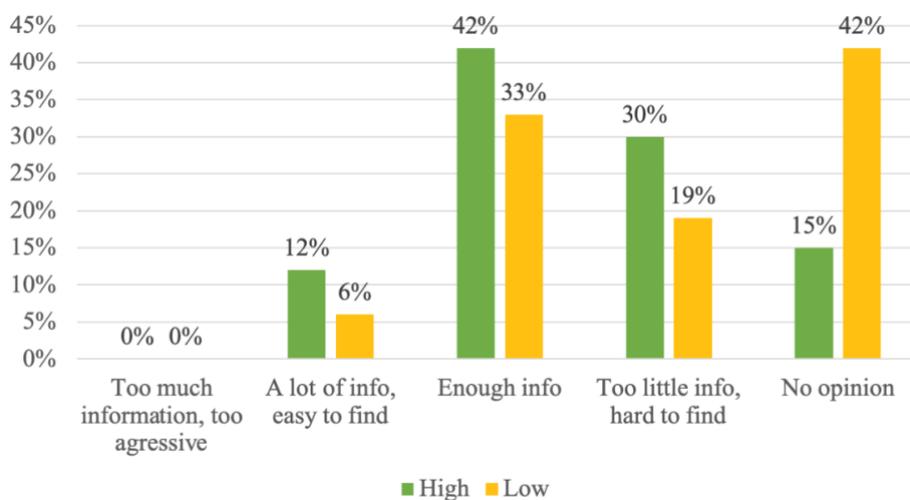


Figure 9. Amount and availability of information regarding new brands, left (green; n=66) stacks represent the high engagement group, right (yellow; n=35) stacks represent the low engagement group

Source: figure created by the author based on the results of the survey

When the same was studied about established brands, the majority of both groups responded to having a sufficient amount of information and for it to be easy to find (see Figure 10). An interesting finding is also that none of the respondents found there to be too much information or for it to be too aggressive, either for new or established brands. It can be concluded that established brands have had more time, channels, and possibilities to make their brand known and the topic of limited advertising is more pressing for new brands coming to the Estonian market.

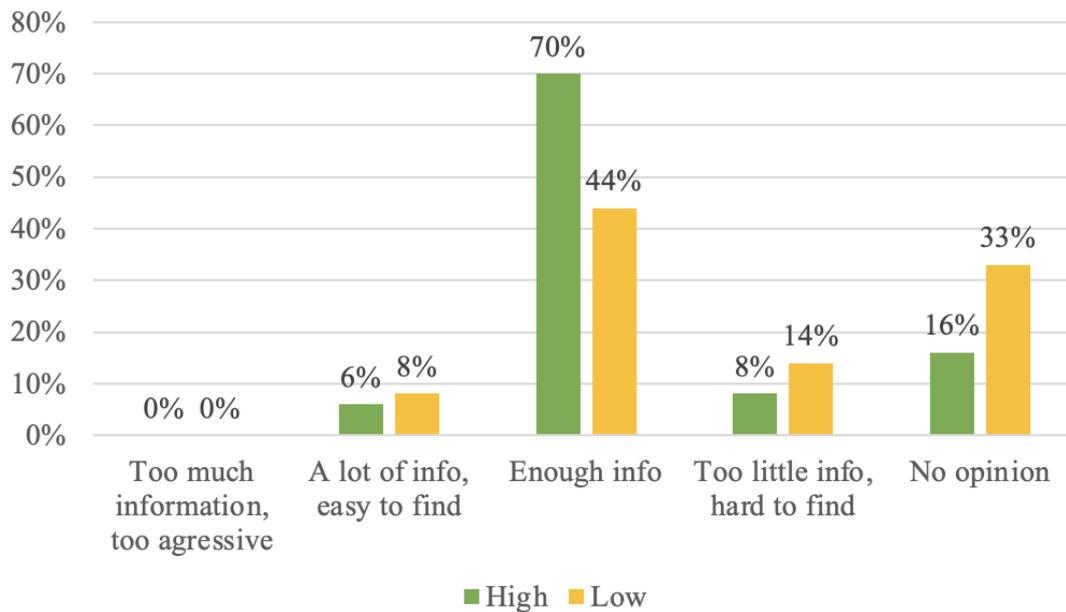


Figure 10. Amount and availability of information regarding established brands, left (green; n=66) stacks represent the high engagement group, right (yellow; n=35) stacks represent the low engagement group

Source: figure created by the author based on the results of the survey

To study the importance of different factors of advertising that may influence consumer decision making, a variety of selected advertising methods were measured on a Likert scale. T-test results showed the relationship between the means in the low and high engagement group. For all the factors, the T-test value appeared to be smaller than the critical value, meaning that the results are statistically significant, and we can accept the null hypothesis. Accepting the null hypothesis means that the difference between two sample means was nonexistent or insignificant. The closer the result of the T-test was to number 1, the higher the similarity between the means of the groups regarding the specific factor measured. The results (see Table 2) showed that the biggest difference was in the importance of availability (marked with blue in Table 2), where the high engagement group rated it to be more important than the low engagement group. The next biggest difference appeared when rating the importance of price (marked with blue in Table 2) as the high engagement group rated it to be much less important than the low engagement group did.

Table 2. Means and T-test results of the influence on consumer decision making of different factors of advertising (n=101)

|                     | Mean in high engagement group; n=66 | Mean in low engagement group; n=35 | T-test |
|---------------------|-------------------------------------|------------------------------------|--------|
| Product             | 3,6                                 | 3,6                                | 0,89   |
| Marketing           | 2,8                                 | 2,6                                | 0,53   |
| Price               | 3,7                                 | 3,4                                | 0,13   |
| Availability        | 3,6                                 | 3,2                                | 0,09   |
| Friends, family     | 3,5                                 | 3,4                                | 0,62   |
| Product image       | 3,0                                 | 2,8                                | 0,36   |
| Cultural background | 3,1                                 | 3,1                                | 0,88   |
| Motivation          | 3,7                                 | 3,6                                | 0,66   |
| Previous experience | 4,1                                 | 4,0                                | 0,62   |

Source: table created by the author based on the results of the survey

For finding out the most influential channels of alcohol advertising regarding consumer decision making in Estonia, different aspects were studied. Firstly, the frequency of noticing alcohol advertising was included in the survey to understand how much consumers pay attention to it and how much the comprehension of advertising differs within the groups.

Regarding the frequency of noticing alcohol advertising in the society, an interesting parallel could be drawn with the openness to new products (see Figure 11). In the high engagement group, 73% of respondents admitted to noticing alcohol advertising at least once a month of which 68% answered to notice advertising even more frequently and 27% responded to not notice advertising at all or notice it only yearly. It was found that the respondents who notice alcohol advertising at least once a month were largely the same people, who responded to being very open or relatively open to new products.

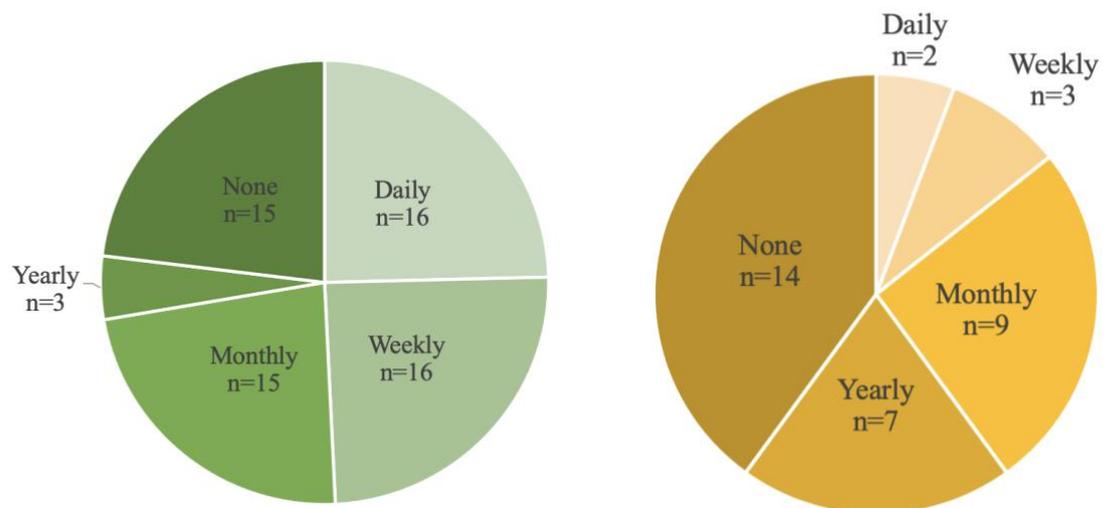


Figure 11. Frequency of noticing alcohol advertising over the last year in high engagement group (left; n=66); frequency of noticing alcohol advertising over the last year in low engagement group (right; n=35)

Source: figure created by the author based on the results of the survey

In the low engagement group, the same trend occurred. The 40% of respondents who stated to not notice alcohol advertising at all, were largely the same as the 42% of respondents who admitted to not being open to new products or to being rarely open to it. It could be concluded that it is much more difficult to target advertising to the people who purchase alcohol more seldom as they are not that open to receiving information on this topic.

To find out which forms of advertising influence a consumer, different channels of advertising that are allowed in Estonia, were measured (see Figure 12). Respondents were asked to answer on a Likert scale and the graph includes mean answers in high and low engagement groups compared. An interesting trend occurred when comparing high and low engagement groups - the mean values of all channels were higher in the high engagement group, meaning the respondents of the group valued the influence of the included channels to be rather important when it comes to their decision making. The two highest valued channels were the same in both engagement groups - masterclasses and in-store ads or offers.

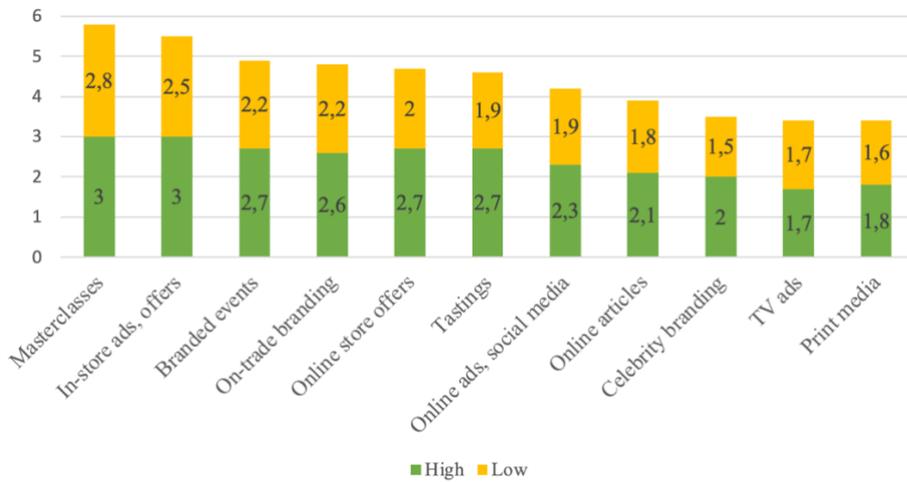


Figure 12. Channels of advertising which influence a consumer (n=mean of Likert scale), green stacks represent high engagement group, yellow stacks represent the low engagement group  
Source: figure created by the author based on the results of the survey

To further find out which channels of advertising consumers respond well to, the likeability and usefulness of different forms of advertising was studied (see Figure 13). The pattern remained similar to the previous question where respondents rated how and if different advertising channels influence their decision making. The most useful and likable form of advertising was rated to be in-store ads and offers both by the high and low engagement groups. In the low engagement group, the most unnecessary form was selected to be TV ads and in the high engagement group, celebrity branding was chosen as the most unnecessary.

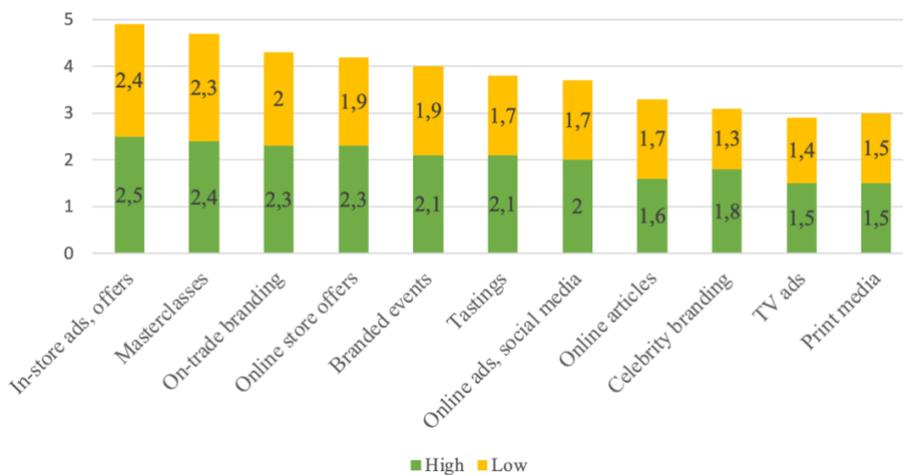


Figure 13. The mean of usefulness/likeability of different forms of advertising (n=mean of Likert scale), green stacks represent the high engagement group, yellow stacks represent the low engagement group

Source: figure created by the author based on the results of the survey

Additionally, correlation analysis was conducted to find out the correlation between the age of the respondent and their experience in purchasing alcohol. Spearman's rank correlation coefficient was used. The correlation trend was found to be linear and quite similar in both groups. The correlation analysis showed a strong positive relationship in the high engagement group with a correlation coefficient of 0,77 (see Figure 14).

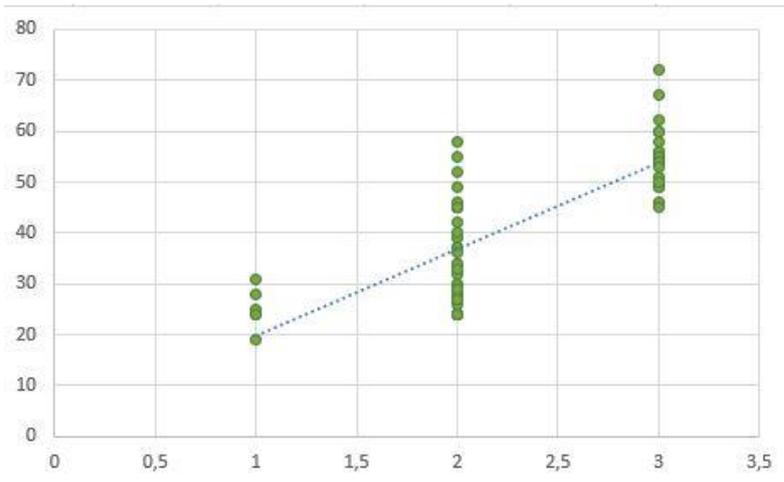


Figure 14. Correlation between age and experience in the high engagement group  
Source: figure created by the author based on the results of the survey

The same trend occurred with the low engagement group where the correlation coefficient was 0,61 (see Figure 15). Both correlation coefficients were higher than respective p-values meaning that they are statistically significant. Based on the coefficients it can be said that there was a stronger relationship between age and experience in the high engagement group compared to the low engagement group, meaning that as the age grows, the experience grows as well.

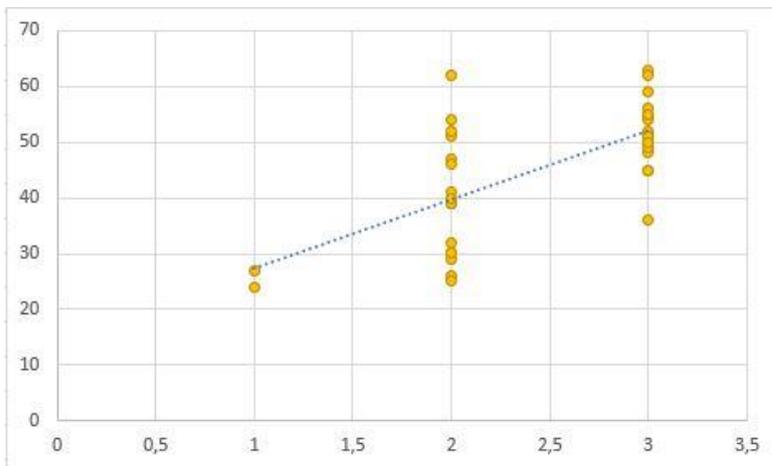


Figure 15. Correlation between age and experience in the low engagement group  
Source: figure created by the author based on the results of the survey

Finally, the questions and results of the survey were divided into two groups based on which research questions they aided to answer. Based on the Model of Consumer Decision Making studied before, the results were concluded in a comparative figure. As shown on the following figure (see Figure 16, continues on two pages), the high and low engagement group had some differences and some similarities in the trends that occurred.

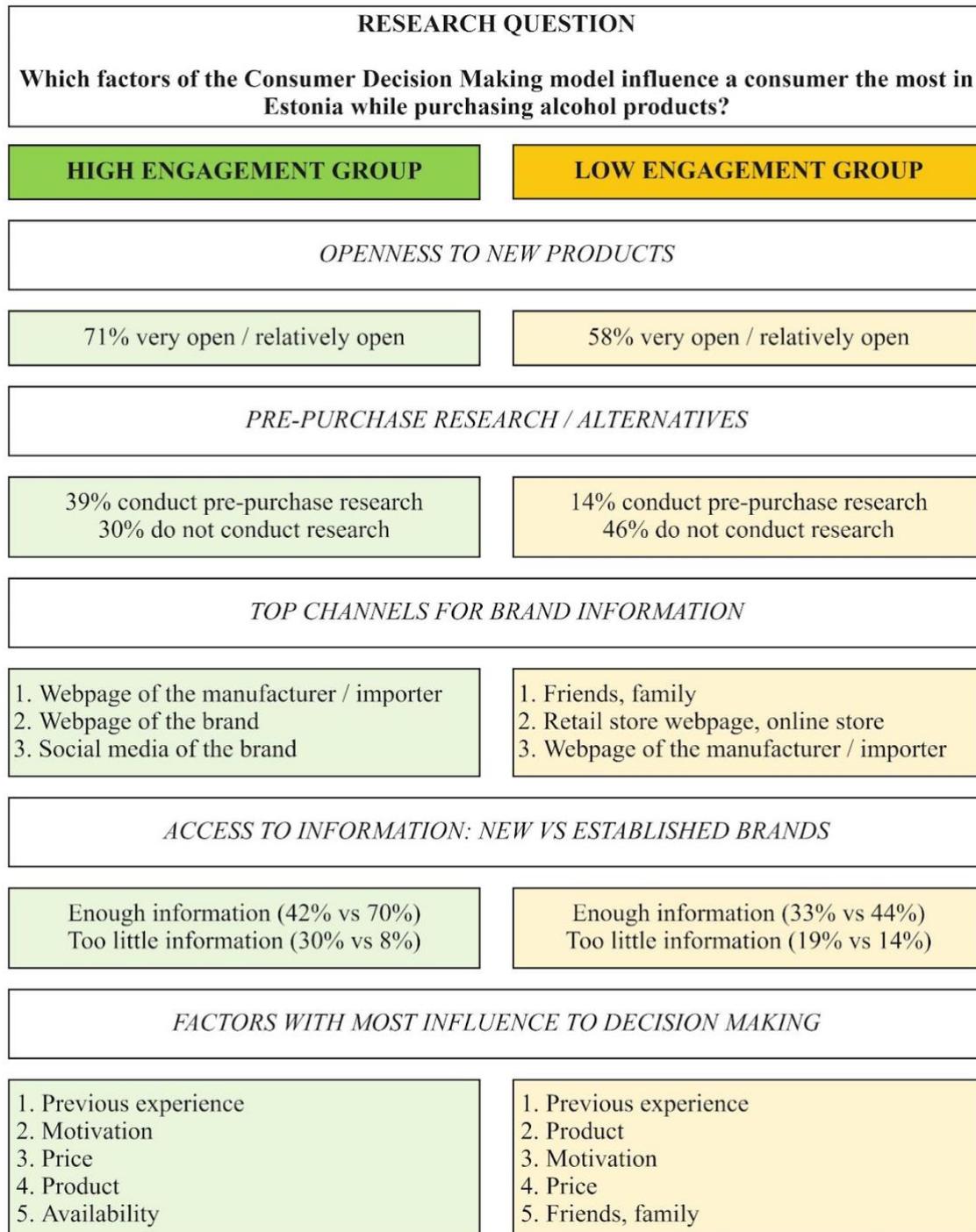


Figure 16 continued.

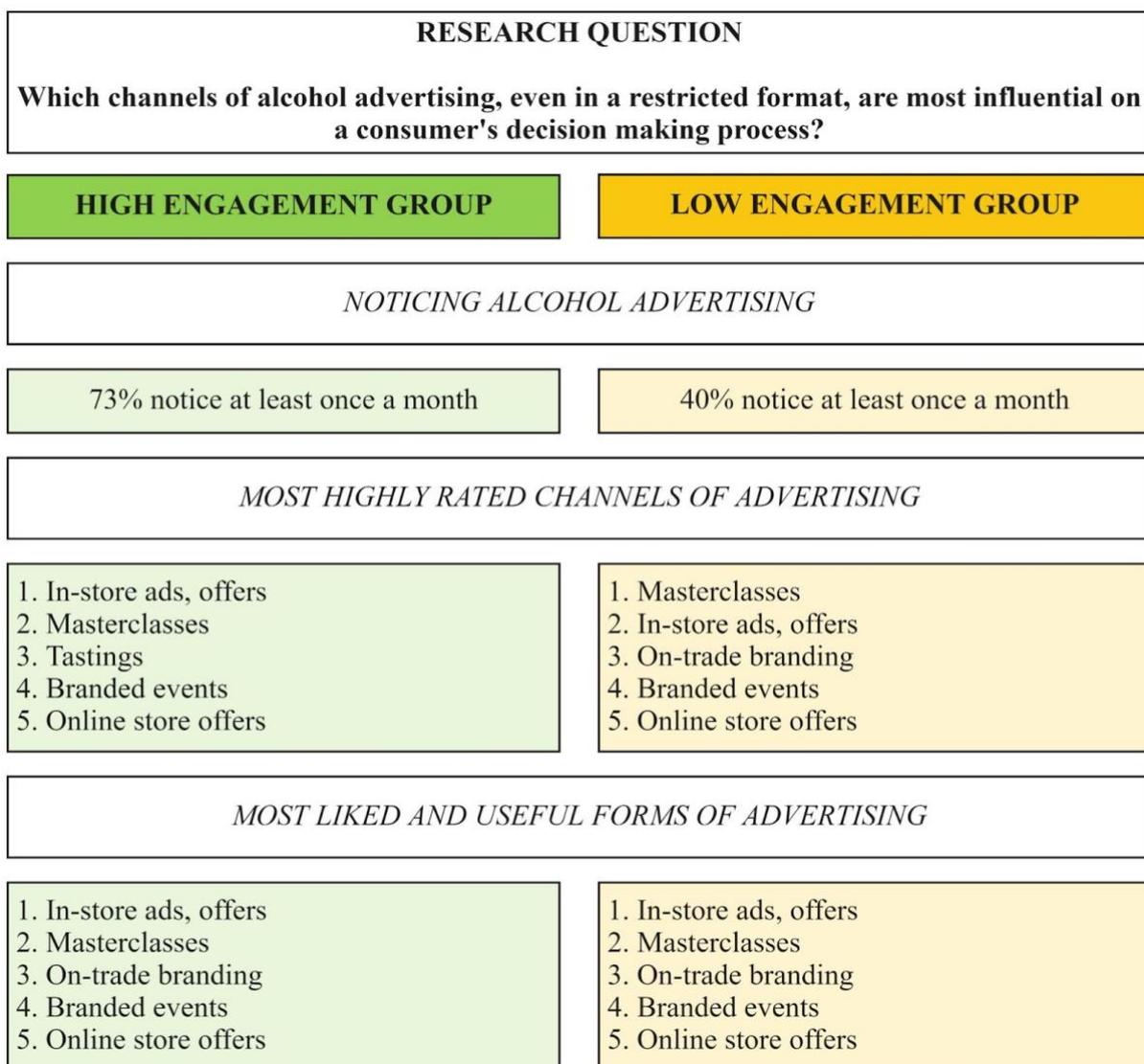


Figure 16. Conclusion of the survey results in the context of the research questions  
Source: figure created by the author based on the results of the survey

When comparing the two engagement groups, the high engagement groups is more open to new products and notices alcohol advertising almost two times more often than the low engagement group. The respondents of the high engagement group are two times more likely to do pre-purchase research and mostly use online channels like webpages and social media channels to gather information whereas the other group relies more on the recommendations of friends and family and is less likely to choose an unknown brand or a product they have not tried before. Both engagement groups found that access to the information on known brands is relatively accessible

compared to the information about new brands. Regarding factors that influence the decision-making process, the groups rated the main factors to be quite similar but with the order being different in the groups. Same trend was found in the top channels of advertising.

### **3.2. Discussions and proposals**

Based on the study, consumers with a high level of engagement and with a low level of engagement differ in quite many aspects. The sample used in the thesis largely differs from the population of Estonia as public research shows that in 2020, 63% of the alcohol consumed in Estonia consisted of different beer and cider products (Estonian Institute of Economic Research, 2021). The reason for this might be that with the chosen convenience sample, the author aimed to study the decision-making process of the distilled and wine products consumers', thus the survey was sent to people more known to prefer these types of products.

Based on the thesis, it would be wise for alcohol manufacturers and importers to divide their potential consumers into different groups based on their engagement. To further explore this topic, the groups could be divided also based on other factors like income, social background, place of residence and other lifestyle choices like dietary preferences and workout habits. For example, it is possible that consumers who rarely purchase alcohol and would thus be considered to have a low level of engagement, but have a very strict dietary plan, are more prone to making pre-purchase research and thus more conscious decisions.

To gain competitive advantage, alcohol manufacturers could target different engagement groups with very different marketing forms. For the high engagement group, the emphasis should be put on online channels to make sure the information is easily accessible, quick to find and useful. This group appreciates more in-depth information and values the possibility of making conscious decisions more highly. For these consumers, the social media channels and webpages of the brand and the manufacturer or importer are important for gaining information. This means that even though most social media marketing is restricted in Estonia, this form of advertising still has great value and should not be overlooked due to restrictions. Also, as 30% of the high engagement group thought there is not enough information regarding new brands, more effort should be put on making information about new products accessible and easier for the consumer to find. Additionally, consumers' appreciation of masterclasses and tastings should be targeted more as today this is not a very common method of advertising. Quite surprisingly, branded events were

valued very highly as a factor that influences decision making both by the high and low engagement group. This means alcohol manufacturers and importers could also use this form of marketing more as this is one of the most active ways of marketing that is allowed by law and could help to build a positive brand association.

For the low engagement group, companies should focus on in-store advertising as these consumers do not find it necessary to do as much pre-purchase research and prefer to choose between products that are familiar to them. Out of possible channels for finding product information, this group prefers the webpage of the retail store as opposed to the high engagement group. Additionally, these consumers chose price campaigns as an important factor of influence so this should be an important focus for the companies as well. This group admitted to relying more on the recommendations of friends and family.

The research had some limitations as the author, firstly, used a convenience sample and thus had a concentrated group of respondents. This gives the opportunity to create further studies with a larger sample that better represents the population. Secondly, in the current research, only a selected parts of the Model of Consumer Decision Making were used as the aim was to find out the main factors that alcohol companies could use for advertising. The research could also be done on a broader scale using the whole model to find out the complete overview of a consumer's decision-making process when it comes to purchasing alcohol.

The author, in conclusion, proposes that further research could be conducted with different engagement groups to see what other factors influence a consumer's level of engagement. Additionally, the same type of research could be conducted for beer and cider consumers to see how and if the results differ and what are the methods of advertising that companies should use for them. To do broader research regarding consumer decision making when it comes to purchasing alcohol, the Schiffman and Kanuk model could be used fully, meaning all suggested aspects of the decision-making process model could be studied.

## CONCLUSION

Although there are many alcohol manufacturers and importers in Estonia, not much information has been gathered regarding the influences of the alcohol advertising restrictions. Thus, the aim of this thesis was to find out which factors have the biggest impact on customers' alcohol purchase decisions today and if the few advertising methods that are allowed but restricted have any impact on a consumer's decision making. The thesis focused on wine and distilled products as the advertising for these products differs from the beer and cider category.

As a foundation for the study, the author used the Model of Consumer Decision Making introduced by Schiffman and Kanuk (2007). Selected elements of the model were used to focus on the research from the alcohol companies' point of view that want to educate their consumers on different product categories and introduce new brands. The thesis offers alcohol companies an insight into the topic and helps to understand which methods to use and what influences consumers the most. Data was collected using a structured quantitative survey. Respondents were divided into two groups based on their level of engagement on the topic. The data was analyzed using comparative analysis, correlation analysis and T-test.

The first research question was about the factors of the Model of Consumer Decision Making that influence a consumer the most, given that advertising is restricted in Estonia. In conclusion it can be said that the high engagement group is more open to new products and does more pre-purchase research. Consumers with high engagement rely more on online channels for gathering information and value their previous experience, motivation for purchase, price, product, and availability as factors with most influence on their decision making. Consumers with low engagement turned out to be less open to new products and to do very little pre-purchase research. This group relies more on the recommendations of friends and family and on the webpages of retail stores. These consumers valued previous experience, product, motivation for purchase, price and friends and family as factors with most influence on their purchase decisions.

The second research question was about the channels of alcohol advertising that, even in a restricted format, are most influential on a consumer's decision-making process. The respondents of the high engagement group admitted to noticing alcohol advertising quite often while in the low engagement group, the frequency of noticing alcohol advertising was relatively lower. The channels of advertising that the respondents rated most influential to their decisions, turned out to largely be the same in both groups - masterclasses, in-store ads, branded events, and online store offers, the only difference being that the high engagement group also valued tastings highly while the low engagement group rather preferred on-trade branding. The channels which the respondents valued as most liked and useful, were also largely the same as the ones they found most influential.

Based on these results in order to gain competitive advantage, alcohol manufacturers should target different engagement groups with very different marketing forms. For the high engagement group, the emphasis should be put on online channels to make sure the information is easily accessible, quick to find and useful. For the low engagement group, companies should focus on in-store advertising as these consumers do not find it necessary to do as much pre-purchase research and prefer to choose between products that are familiar to them.

The author proposes that further research should be conducted with different engagement groups to see what other factors influence a consumer's level of engagement. Additionally, the same type of research could be conducted for beer and cider consumers to see how and if the results differ and what are the methods of advertising that companies should use for them. Also, to get a broader understanding regarding consumer decision making when it comes to purchasing alcohol, the Schiffman and Kanuk model could be used fully, meaning all suggested aspects of the decision-making process model could be studied.

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# APPENDICES

## Appendix 1. Google Forms questionnaire

Jaotis 1 / 4-st

### Tarbijate ostuotsust mõjutavad tegurid

Olen Tallinna Tehnikaülikooli rahvusvahelise ärikorralduse tudeng Grete Elmi ja olen kirjutamas lõputööd tarbijate alkoholi ostu otsuseid mõjutavate tegurite kohta.

Olen tänulik, kui võtate ca 4-5 minutit antud küsimustiku täitmiseks.  
Käesoleva uuringu läbiviimisega ei propageerita alkoholi tarbimist.

Kas olete täisealine? \*

Jah

Ei

Jaotis 2 / 4-st

### ÜLDINE INFO

Kirjeldus (valikuline)

Kas töötate ettevõttes/valdkonnas, mis on otseselt seotud alkoholi maaletoomise/tootmise/edasimüügiga? \*

Jah

Ei

Palun valige, millist tüüpi alkohoolseid jooke olete viimase aasta jooksul põhiliselt ostnud \*

Lahjat alkoholi

Veini

Kanget alkoholi

Kui tihti ostate veini või kanget alkoholi? \*

- Mitu korda nädalas
- Kord nädalas
- Vähemalt kord kuus
- Harvem kui kord kuus
- 1-2 korda aastas
- Ei osta üldse alkoholi

Jaotis 3 / 4-st

TARBIJA OSTUOTSUSTE UURING



Järgnevad küsimused on kange alkoholi ja veini kohta.

Kui pikk on Teie kogemus veini ja/või kange alkoholi toodete ostmisel?

- 1 - 5 aastat
- 6 - 25 aastat
- Kauem kui 25 aastat

Kui avatuks hindate end ise uute veini ja/või kange alkoholi brändide ostmise suhtes? \*

- Olen uutele toodetele avatud ja eelistan pigem proovida kogu aeg uusi tooteid
- Olen uutele toodetele avatud vaid siis, kui turundus või sisu on väga köitev
- Proovin uusi tooteid pigem erandlikult, pigem eelistan juba tuttavaid tooteid
- Ei proovi uusi tooteid üldse, ei näe vajadust
- Muu...

Kui palju teete eeltööd enne uue alkohoolse toote ostmist (konkureerivate toodetega võrdlemine, sisuga tutvumine jms)? \*

- Tutvun tootega põhjalikult enne ostmist
- Tutvun põhjalikult nii endale meelepärase toote kui alternatiividega
- Tutvun põgusalt tootevalikuga poes kohapeal ja valin endale tuttavate brändide vahel
- Ei tee eeltööd, valin vaid varasemalt proovitud toodete vahel
- Ei tee eeltööd, otsustan poes kohapeal, teen valiku kõikide toodete vahel võrdselt
- Muu...

Kuidas hindad info kättesaadavust ja hulka alkohoolsete toodete osas? \*

|                  | Ei oska öelda         | Infot on liiga vä...  | Info on piisav/l...   | Infot on palju/k...   | Infot on liiga pa...  |
|------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Uued brändid     | <input type="radio"/> |
| Vanemad bränd... | <input type="radio"/> |

Milliseid kanaleid kasutate, et saada infot kindla alkoholibrändi või tootegrupi kohta? \*

- Poe koduleht/e-pood
- Alkoholitootja/maaletooja kodulehekül
- Alkoholitootja/maaletooja sotsiaalmeediakanalid (Facebook, Instagram jne)
- Konkreetse brändi kodulehekül
- Konkreetse brändi sotsiaalmeediakanalid (Facebook, Instagram jne)
- Küsin tuttavatelt soovitusi/kogemusi
- Online artiklid, uudised
- Sisuturundusartiklid printmeedias
- Ei kasuta ühtegi nendest
- Muu...

Palun hinnake allolevate faktorite tähtsust, kui olete otsustamas, millist alkohoolset toodet \* osta

|                   | Ei oska öelda         | Pole üldse tä...      | Vähetähtis            | Nii ja naa            | Tähtis                | Väga tähtis           |
|-------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Toode ise - p...  | <input type="radio"/> |
| Turundus - n...   | <input type="radio"/> |
| Hind              | <input type="radio"/> |
| Toote kättes...   | <input type="radio"/> |
| Pere ja tuttav... | <input type="radio"/> |
| Toote kuan...     | <input type="radio"/> |
| Kultuuriline t... | <input type="radio"/> |
| Motivaator - ...  | <input type="radio"/> |
| Varasem kog...    | <input type="radio"/> |

Kui tihti märkate end ümbritsevas keskkonnas alkoholi reklaame?

- Igapäevaselt
- Mõned korrad nädalas
- Mõned korrad kuus
- Mõned korrad aastas
- Ei ole alkoholi reklaame viimase aasta jooksul tähele pannud

## Appendix 1 continued

:::

\*

Palun märkige, mil määral tunnete, et all välja toodud alkoholi reklaami vormid Teie otsustamist mõjutavad, kui olete valimas sobivat toodet.

Märkige ainult nende vormide kohta, mida olete orienteeruvalt viimase aasta jooksul Eestis märganud.

|                   | Ei oska öelda         | Pole üldse t...       | Vähetähtis            | Nii ja naa            | Tähtis                | Väga tähtis           |
|-------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Telereklaam       | <input type="radio"/> |
| Reklaamid/...     | <input type="radio"/> |
| Reklaamid v...    | <input type="radio"/> |
| Reklaamid/...     | <input type="radio"/> |
| Reklaamid/...     | <input type="radio"/> |
| Kindla alkoh...   | <input type="radio"/> |
| Online artikli... | <input type="radio"/> |
| Sisuturundu...    | <input type="radio"/> |
| Koolitused        | <input type="radio"/> |
| Degusteeri...     | <input type="radio"/> |
| Tuntud inim...    | <input type="radio"/> |

## Appendix 1 continued

Palun märkige, milliseid vorme alkoholi reklaamidest hindate enda jaoks informatiivseks ja meeldivaks ja/või milliseid ebavajalikuks?

Märkige ainult nende vormide kohta, mida olete orienteeruvalt viimase aasta jooksul Eestis märganud.

|                         | Meeldiv/Informati...  | Neutraalne            | Ebavajalik            | Ei oska öelda         |
|-------------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Telereklaam             | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Reklaamid/eripakk...    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Reklaamid veebis (...)  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Reklaamid/eripakk...    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Reklaamid/brändin...    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Kindla alkoholibrä...   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Online artiklid, uud... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Sisuturundusartikli...  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Koolitused              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Degusteerimised         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Tuntud inimestega...    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Jaotis 4 / 4-st

DEMOGRAAFIA ✕ ⋮

Kirjeldus (valikuline)

Teie vanus? \*

Lühike vastuse tekst

Teie sugu? \*

Mees

Naine

Ei soovi täpsustada

Source: questionnaire created by the author

## Appendix 2. Results of the survey (in % of total respondents)

1. Are you over 18 years old (adult)?
 

|     |      |
|-----|------|
| Yes | 100% |
| No  | 0%   |
  
2. Do you work in a company/industry directly related to the import/production/resale of alcohol?
 

|     |       |
|-----|-------|
| Yes | 19,5% |
| No  | 80,5% |
  
3. Please choose what type of alcoholic beverages you have primarily purchased in the past year?
 

|                         |       |
|-------------------------|-------|
| Beers and ciders        | 20,3% |
| Wine                    | 50,8% |
| Hard liquor             | 19,5% |
| Hard liquor and/or wine | 9,4%  |
  
4. How often do you buy wine or hard liquor?
 

|                                  |       |
|----------------------------------|-------|
| Multiple times a week            | 7%    |
| Once a week                      | 16,4% |
| At least once a month            | 39,8% |
| Less than once a month           | 24,2% |
| 1-2 times per year               | 12,4% |
| I do not buy alcoholic beverages | 0%    |
  
5. What is the length of your experience for buying wine and/or hard liquor?
 

|                    |       |
|--------------------|-------|
| 1 – 5 years        | 7,3%  |
| 6 – 25 years       | 55,5% |
| More than 25 years | 37,2% |
  
6. In your opinion, how open you are to buy new brands of wine/hard liquor?
 

|   |       |
|---|-------|
| I am open to new products and prefer to try something new all the time            | 36%   |
| I am open to new products only if the marketing or ingredients is very compelling | 33,3% |
| I rarely try new products and prefer already familiar products                    | 25,2% |
| I do not try new products   | 5,4%  |
  
7. How much pre-research you conduct before buying a new alcoholic product (comparison with competing products, checking the ingredients, etc)?
 

|   |       |
|---|-------|
| I inspect the product thoroughly before buying                                      | 5,4%  |
| I inspect thoroughly both the preferred product and the alternatives                | 23,4% |
| I briefly inspect the product range at the store and choose between familiar brands | 31,5% |

**Appendix 2 continued**

|   |       |
|---|-------|
| No research, I only choose between familiar products                      | 14,4% |
| No research, I decide at the store on site without having any preferences | 22,5% |
| Other   | 2,8%  |

8. How do you rate the availability and amount of information regarding alcoholic products?

|                    | No opinion | Too little information | Enough information | A lot of information | Too much information |
|--------------------|------------|------------------------|--------------------|----------------------|----------------------|
| New brands         | 22,7%      | 25,5%                  | 42,7%              | 8,2%                 | 0,9%                 |
| Established brands | 20,2%      | 9,2%                   | 63,3%              | 6,4%                 | 0,9%                 |

9. What channels do you use to get information about a specific alcohol brand or product group?

|  |       |
|--|-------|
| Online store/store's webpage                           | 42,3% |
| Webpage of the alcohol producer/importer               | 36%   |
| Social media channels of the alcohol producer/importer | 21,6% |
| Webpage of a specific brand                            | 30,6% |
| Social media channels of a specific brand              | 27%   |
| Opinions and recommendations from family/friends       | 55,9% |
| Online articles, news                                  | 18%   |
| Content marketing articles in print media              | 12,6% |
| I do not use any of abovementioned choices             | 18,9% |
| Other  | 0,9%  |

10. Please rate the importance of the following factors when deciding which alcoholic product to buy.

|                        | No Opinion | Not important | A bit important | Neutral | Important | Very important |
|------------------------|------------|---------------|-----------------|---------|-----------|----------------|
| Product                | 2%         | 6%            | 9%              | 15%     | 44%       | 23%            |
| Marketing              | 4%         | 12%           | 20%             | 41%     | 23%       | 1%             |
| Price                  | 0%         | 0%            | 8%              | 32%     | 50%       | 10%            |
| Availability           | 2%         | 8%            | 7%              | 22%     | 45%       | 16%            |
| Recommendations        | 1%         | 0%            | 14%             | 31%     | 43%       | 11%            |
| Product image          | 5%         | 8%            | 19%             | 32%     | 30%       | 6%             |
| Cultural background    | 2%         | 10%           | 13%             | 32%     | 39%       | 5%             |
| Specific reason to buy | 3%         | 3%            | 4%              | 23%     | 57%       | 11%            |
| Previous experience    | 0%         | 1%            | 7%              | 14%     | 51%       | 27%            |

11. How often do you notice alcohol advertisements around you?

|                     |       |
|---------------------|-------|
| Daily               | 18,2% |
| A few times a week  | 20,9% |
| A few times a month | 22,7% |
| A few times a year  | 10,9% |
| Never               | 27,3% |

12. Please indicate to what extent you feel that the channels of alcohol advertising influence your decision when buying an alcoholic product.

(Only for those channels that you have noticed during the past year in Estonia)

|                                      | No<br>Opinion | Not<br>important | A bit<br>important | Neutral | Important | Very<br>important |
|--------------------------------------|---------------|------------------|--------------------|---------|-----------|-------------------|
| TV-ads                               | 12%           | 35%              | 28%                | 20%     | 5%        | 1%                |
| Ads/specials in store                | 5%            | 14%              | 13%                | 30%     | 32%       | 6%                |
| Online ads                           | 9%            | 27%              | 26%                | 19%     | 16%       | 3%                |
| Ads/specials in<br>retail stores     | 9%            | 20%              | 23%                | 16%     | 28%       | 4%                |
| Ads/branding in<br>restaurants, bars | 5%            | 22%              | 21%                | 31%     | 18%       | 4%                |
| Branded events                       | 6%            | 23%              | 18%                | 27%     | 20%       | 5%                |
| Online articles                      | 14%           | 26%              | 24%                | 22%     | 13%       | 2%                |
| Content articles                     | 15%           | 32%              | 26%                | 18%     | 7%        | 2%                |
| Masterclasses                        | 17%           | 15%              | 16%                | 21%     | 24%       | 6%                |
| Tastings                             | 9%            | 10%              | 12%                | 29%     | 32%       | 9%                |
| Marketing with<br>celebrities        | 10%           | 31%              | 29%                | 22%     | 9%        | 0%                |

13. Please indicate which channels for alcohol advertising you consider informative and pleasant and/or which channels you consider unnecessary.

(Only for those channels that you have noticed during the past year in Estonia)

| opinion                          | Pleasant/<br>Informative | Neutral | Unnecessary | No  |
|----------------------------------|--------------------------|---------|-------------|-----|
| TV-ads                           | 10%                      | 39%     | 40%         | 11% |
| Ads/specials in store            | 58%                      | 33%     | 7%          | 2%  |
| Online ads                       | 24%                      | 45%     | 26%         | 5%  |
| Ads/specials in<br>retail stores | 44%                      | 40%     | 9%          | 7%  |

## Appendix 2 continued

|                                   |     |     |     |     |
|-----------------------------------|-----|-----|-----|-----|
| Ads/branding in restaurants, bars | 38% | 45% | 12% | 5%  |
| Branded events                    | 35% | 39% | 20% | 7%  |
| Online articles                   | 20% | 38% | 28% | 14% |
| Content articles                  | 13% | 38% | 36% | 13% |
| Masterclasses                     | 46% | 23% | 15% | 16% |
| Tastings                          | 58% | 27% | 8%  | 7%  |
| Marketing with celebrities        | 12% | 50% | 30% | 9%  |

### 14. How old are you?

|    |      |
|----|------|
| 19 | 0,9% |
| 24 | 7,2% |
| 25 | 1,8% |
| 26 | 1,8% |
| 27 | 3,6% |
| 28 | 3,6% |
| 29 | 4,5% |
| 30 | 4,5% |
| 31 | 0,9% |
| 32 | 3,6% |
| 33 | 2,7% |
| 34 | 3,6% |
| 36 | 2,0% |
| 37 | 1,8% |
| 39 | 3,6% |
| 40 | 1,8% |
| 41 | 0,9% |
| 42 | 0,9% |
| 45 | 6,3% |
| 46 | 2,7% |
| 47 | 0,9% |
| 48 | 0,9% |
| 49 | 3,6% |
| 50 | 2,7% |
| 51 | 3,6% |
| 52 | 2,7% |
| 53 | 0,9% |
| 54 | 6,3% |
| 55 | 3,6% |
| 56 | 3,6% |
| 57 | 1,8% |
| 58 | 1,8% |
| 59 | 0,9% |
| 60 | 1,8% |

## Appendix 2 continued

|    |      |
|----|------|
| 62 | 3,6% |
| 63 | 0,9% |
| 67 | 0,9% |
| 72 | 0,9% |

To summarize:

|             |                        |
|-------------|------------------------|
| 18-24 years | 10 respondents (7,8%)  |
| 25-44 years | 53 respondents (41%)   |
| 45-64 years | 62 respondents (48,1%) |
| 65+ years   | 4 respondents (3,1%)   |

15. What is your gender?

|                      |       |
|----------------------|-------|
| Male                 | 61,3% |
| Female               | 37,8% |
| Prefer not to answer | 0,9%  |

Source: questionnaire created, and responses collected by the author

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