

# YOUTH EXPOSURE TO ALCOHOL ADVERTISING IN MAGAZINES, 2001 TO 2004: GOOD NEWS, BAD NEWS

## I. Executive Summary

Youth<sup>1</sup> exposure to alcohol advertising in magazines decreased from 2001 to 2004, but young people ages 12 to 20 were still seeing more beer, distilled spirits and alcopops advertising than adults per capita in 2004,<sup>2</sup> according to an analysis by the Center on Alcohol Marketing and Youth of 13,738 ads costing more than \$1.3 billion. Major findings include the following:

- In 2004, youth saw 15% more beer advertising, 10% more distilled spirits advertising and 33% more advertising for alcopops<sup>3</sup> per capita than adults age 21 and over.
- This reflects a decline of 31% in youth exposure to alcohol advertising in magazines from 2001 to 2004. At the same time, the number of alcohol ads placed per year fell by only 10%, and adult exposure dropped only 17%, suggesting alcohol companies were able to shield youth from exposure to their advertising without a concomitant drop in their ability to reach the legal-age audience.
- Only 3% of alcohol ads and less than 2% of alcohol advertising dollars in 2004 were spent in magazines exceeding the alcohol industry’s voluntary maximum of 30% for audiences under age 21.
- In contrast, 42% of ads and 48% of spending in 2004 were in magazines that exceeded 15%, roughly the proportion of youth ages 12 to 20 in the general population age 12 and above.
- In 2004, 211 alcohol brands placed ads in the magazines analyzed for this report. More than half of youth exposure to alcohol advertising in magazines came from 22 of those brands, all of which overexposed youth ages 12 to 20 relative to adults age 21 and over. These brands accounted for approximately a third of all alcohol advertising spending in magazines in 2004.

<sup>1</sup> In this report, unless otherwise noted, youth are defined as persons ages 12 to 20, and adults are defined as persons age 21 and over.  
<sup>2</sup> Underage youth are more likely to see on a per capita basis, or be “overexposed” to, a magazine ad for alcohol when it is placed in a publication where the percentage of underage youth in the readership is greater than the percentage of underage youth in the general population. (In 2004, for example, this meant that youth were overexposed to ads in magazines where underage youth were more than 15.3% of the readership.) “More likely to be read by” (as well as percentage measures of youth overexposure and other comparisons of adult and youth exposure to alcohol advertising in this report) is based on “gross rating points,” which measure how much an audience segment is exposed to advertising per capita. Another way of measuring advertising exposure is “gross impressions” (the total number of times all members of a given audience are exposed to advertising). The adult population will almost always receive far more “gross impressions” than youth because there are far more adults in the population than youth. Gross rating points are calculated by dividing gross impressions by the relevant population (e.g., persons age 21 and over) and multiplying by 100. See Appendix B for a glossary of terms used in this report.  
<sup>3</sup> “Alcopops” are also referred to as “low-alcohol refreshers,” “malternatives” or “flavored malt beverages.” Many of the brands in this category, which includes brands such as Mike’s Hard Lemonade and Smirnoff Ice, have alcohol contents of between 4% and 6%, similar to most traditional malt beverages. (Alcohol and Tobacco Tax and Trade Bureau [TTB], “Notice No. 4—Flavored Malt Beverages and Related Proposals,” Federal Register [March 24, 2003]: 14293.) The alcohol industry treats these as a distinct category of alcoholic beverages. This report follows this industry convention.

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## II. Why the Concern

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According to the National Survey on Drug Use and Health, close to 11 million young people ages 12 to 20 drank alcohol in the previous 30 days in 2004, and more than 7 million reported binge drinking (defined as consuming five or more drinks on a single occasion) during the same time frame.<sup>4</sup> Every day, 5,400 young people under 16 start drinking alcohol,<sup>5</sup> while three teens die from drinking and driving,<sup>6</sup> and at least six more die from other alcohol-related causes, such as suicide, homicide, drowning and falls.<sup>7</sup> Alcohol causes one out of four deaths among males ages 15 to 20 and one out of six deaths among their female peers, according to the U.S. Centers for Disease Control and Prevention.<sup>8</sup>

Alcohol use also has adverse effects on young people's chances later in life.

Evidence from both imaging and skills testing has shown that heavy drinking during adolescence affects the development of and levels of activity in young people's brains.<sup>9</sup> The younger one starts drinking, the greater the risks are: those who begin drinking before age 15 are four times more likely to become dependent on alcohol than those who wait until they are 21,<sup>10</sup> seven times more likely to be in an alcohol-related motor vehicle crash, and at least 10 times more likely to be involved in alcohol-related violence.<sup>11</sup>

Evidence is growing that youth exposure to alcohol advertising plays a role in underage drinking. One recent study followed young people over time in 24 media markets and found that for every additional alcohol ad they viewed over an average of 23 per

month, they drank 1% more. For every additional dollar per capita spent on alcohol advertising in their respective media markets (over an average of \$6.80), the same group drank 3% more.<sup>12</sup> Another recent study used econometric analysis to estimate that a 28% decrease in youth exposure to alcohol advertising would result in a 4% to 16% drop in youth drinking and an 8% to 33% drop in youth binge drinking.<sup>13</sup>

When it examined the issue of alcohol advertising and youth in 1999, the Federal Trade Commission (FTC) concluded that, "While many factors influence an underage person's drinking decisions, including among other things parents, peers, and the media, there is reason to believe that advertising also plays a role."<sup>14</sup>

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<sup>4</sup> Substance Abuse and Mental Health Services Administration, *Results from the 2004 National Survey on Drug Use and Health: National Findings* (Rockville, MD: Office of Applied Studies, 2005), 25. Available at <http://oas.samhsa.gov/NSDUH/2k4nsduh/2k4Results/2k4Results.pdf> (accessed April 25, 2006).

<sup>5</sup> Calculated using the 2004 National Survey on Drug Use and Health. J. Gfroerer of the Substance Abuse and Mental Health Services Administration, e-mail to David H. Jernigan, PhD, 3 February 2006.

<sup>6</sup> National Highway Traffic Safety Administration, *Traffic Safety Facts 2004 Data* (Washington, DC: National Center for Statistics and Analysis, U.S. Department of Transportation, 2005), table 6. Available at <http://www-nrd.nhtsa.dot.gov/pdf/nrd-30/NCSA/TSF2004/809905.pdf> (accessed March 14, 2006).

<sup>7</sup> Calculated using Alcohol-Related Disease Impact (ARDI) data. Centers for Disease Control and Prevention, "Alcohol-Attributable Deaths Report, United States 2001: Medium and High Average Daily Alcohol Consumption, Youth <21 due to Alcohol Exposure by Cause and Gender." Available at <http://apps.nccd.cdc.gov/ardi> (accessed February 8, 2006).

<sup>8</sup> Calculated using Alcohol-Related Disease Impact (ARDI) data, Centers for Disease Control and Prevention. Dr. Robert Brewer, CDC, e-mail to David H. Jernigan, PhD, 29 March 2006.

<sup>9</sup> S.A. Brown, S.F. Tapert, "Health Consequences of Adolescent Alcohol Involvement," in *Reducing Underage Drinking: A Collective Responsibility, Background Papers* [CD-ROM] (Washington, DC: National Academies Press, 2004), 383-401.

<sup>10</sup> B. Grant, D. Dawson, "Age of Onset of Alcohol Use and Its Association with DSM-IV Alcohol Abuse and Dependence: Results from the National Longitudinal Alcohol Epidemiologic Survey," *Journal of Substance Abuse* 9 (1997): 103-110.

<sup>11</sup> R. Hingson, D. Kenkel, "Social, Health, and Economic Consequences of Underage Drinking," in *Reducing Underage Drinking: A Collective Responsibility, Background Papers* [CD-ROM] (Washington, DC: National Academies Press, 2004), 363.

<sup>12</sup> L.B. Snyder, F.F. Milici, M. Slater, H. Sun, and Y. Strizhakova, "Effects of alcohol advertising exposure on drinking among youth," *Archives of Pediatrics and Adolescent Medicine* 160 (2006): 18-24.

<sup>13</sup> H. Saffer, D. Dave, "Alcohol advertising and alcohol consumption by adolescents," Abstract, *Health Economics Early View* (13 February 2006). Available at <http://www3.interscience.wiley.com/cgi-bin/abstract/112410704/ABSTRACT> (accessed March 28, 2006).

<sup>14</sup> Federal Trade Commission, *Self-Regulation in the Alcohol Industry: A Review of Industry Efforts to Avoid Promoting Alcohol to Underage Consumers* (Washington, DC: Federal Trade Commission, 1999), 4.

### III. About This Report

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The Center on Alcohol Marketing and Youth at Georgetown University ([www.camy.org](http://www.camy.org)) monitors the marketing practices of the alcohol industry to focus attention and action on industry practices that jeopardize the health and safety of America's youth. Reducing high rates of underage alcohol consumption and the suffering caused by alcohol-related injuries and deaths among young people requires using the public health strategies of limiting the access to and the appeal of alcohol to underage persons. The Center is funded by grants from The Pew Charitable Trusts and the Robert Wood Johnson Foundation to Georgetown University.

CAMY commissioned Virtual Media Resources (VMR) to analyze advertisements for alcoholic beverages placed from 2001 to 2004 in national magazines measured by Mediamark Research Inc. (MRI). VMR is a media research, planning, market analysis and consulting firm based in Natick, Massachusetts, serving communications organizations and marketers in a wide variety of market segments and media. VMR was established in 1992 to provide an independent research firm serving advertising agencies and has grown to service over 100 clients across the United States and Canada in retail, publishing, financial, automotive, public health and other fields.

This report is based on industry-standard data sources and methods that are available to ad agencies and advertisers as they make their decisions about where to place their advertising. This report only covers alcohol product advertising. Advertising occurrence and expenditure data came

from TNS Media Intelligence (formerly known as CMR or Competitive Media Reporting). Audience data came from Mediamark Research Inc. (MRI), the leading industry source for magazine readership demographics.

In recent years, alcohol marketers have placed advertising in so-called "demographic editions" of publications with significant youth audiences. These editions of *Spin*, *Vibe*, *Sports Illustrated*, *ESPN The Magazine*, *Rolling Stone* and *Jane* are typically sent to qualifying subscribers age 21 or older. The specific criteria for these editions vary by publication. No published audience estimates are currently available for these editions, so it is not possible to confirm their youth audience composition. Most of a publication's readership is typically generated by "pass-along" readers, or individuals who read a publication to which they do not subscribe. Because audience data are not available for these demographic editions, this CAMY report relies on the readership data for the general readership editions of these magazines and does not report on advertising in demographic editions.

The measures in this report are standard to the advertising research field but may not be familiar to the general reader. "Reach" refers to the number or percentage of a target population that has the opportunity to see an ad or a campaign through exposure to selected media. "Frequency" refers to the number of times individuals are exposed to an ad or campaign and is most often expressed as an average number of exposures. "Gross rating points," or "GRPs," measure how

much advertising exposure is going to a particular population on a per capita basis. For example, the measure of 100 GRPs indicates that the population received the equivalent of one exposure per person (although this also could have come from 50% of the population seeing the advertising two times). GRPs are the mathematical product of reach and frequency: if the reach is 80% and the average frequency is 2.5, then the GRPs total 200. GRPs thus provide a comparative measure of per capita advertising exposure. Further information on sources and methodology may be found in Appendix A. Appendix B provides a glossary of advertising research terminology.

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Susan Gill Weiss, Principal, Kanban Consulting marketing and media research consultancy; Former Senior Consultant and Director of Electronic Media Sales, Mediamark Research Inc.

James F. Mosher, JD, Director, Center for the Study of Law and Enforcement Policy, Pacific Institute for Research and Evaluation

## IV. Alcohol Advertising in Magazines, 2001 to 2004

Alcohol companies spent more than \$7.4 billion on advertising in the measured media of television, radio, print and outdoor between 2001 and 2004. Of this, almost \$1.7 billion went to advertising in national magazines; this report looked at product advertising representing 81% of this spending.<sup>15</sup> Annual alcohol advertising spending in the magazines analyzed for this report increased by almost 13% over this period (from \$320 million to \$361 million), while ad pages declined by 9% (from 3,616 to 3,283) (see Table 1). Although distilled spirits companies were the dominant buyers of alcohol advertising in magazines from 2001 to 2004, their spending declined during this period (from \$254 million to \$239 million). On the other hand, beer companies substantially increased their spending (from \$31 million to \$65 million), as did wine companies (from \$29 million to \$47 million). Alcopops advertising pages peaked in 2002, followed by spending and pages falling precipitously in 2003, but spending had returned to 2002 levels by 2004.

**Table 1: Alcohol Ads and Spending in National Magazines Measured by MRI, United States, 2001 to 2004**

	Beer and Ale		Distilled Spirits		Alcopops		Wine		Total	
	Ads	Dollars	Ads	Dollars	Ads	Dollars	Ads	Dollars	Ads	Dollars
2001	292	\$30,524,944	2,840	\$254,375,577	73	\$6,944,474	411	\$28,534,584	3,616	\$320,379,579
2002	291	\$33,991,692	2,697	\$260,802,078	96	\$10,294,433	514	\$38,857,593	3,598	\$343,945,795
2003	465	\$54,893,009	2,330	\$228,207,697	29	\$3,009,913	417	\$39,947,891	3,241	\$326,058,509
2004	514	\$64,674,633	2,224	\$239,121,482	70	\$10,468,580	475	\$46,700,395	3,283	\$360,965,090

Source: TNS Media Intelligence, 2001-2004

## IV. Youth Overexposure to Alcohol Advertising in National Magazines

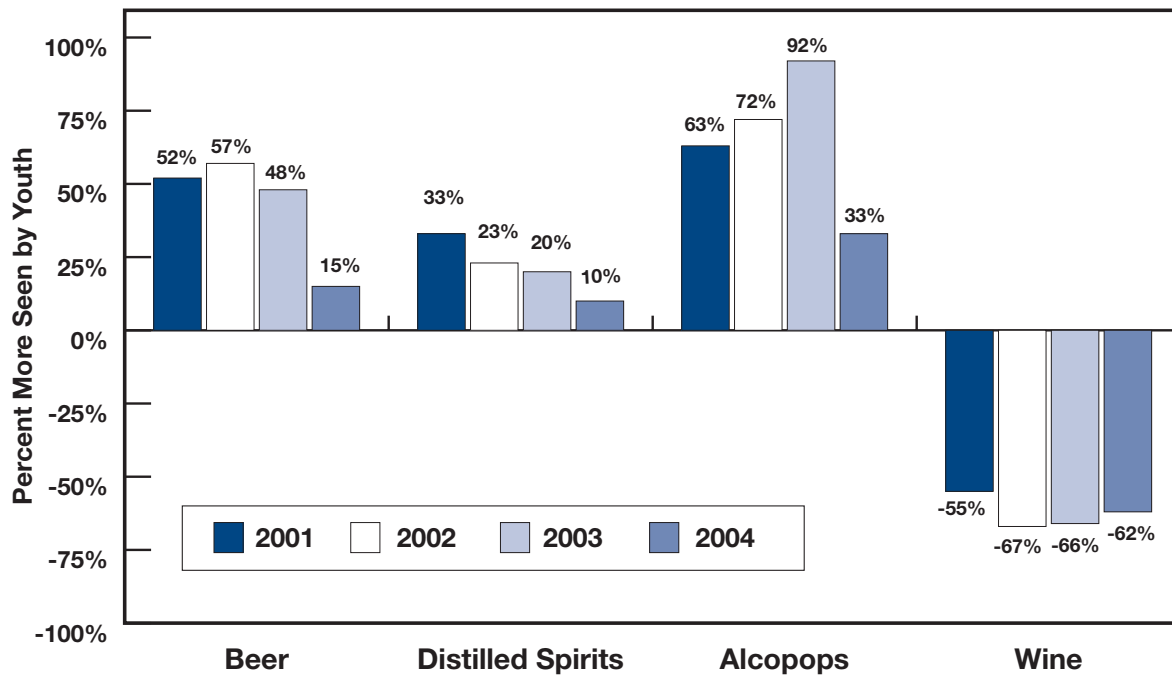
When young people ages 12 to 20 are disproportionately represented in a magazine's readership relative to their presence in the general population, this creates youth "overexposure" to alcohol advertising in the magazine (see footnote 2). In the advertising industry, average issue readership typically equates with advertising exposure.

As Figure 1 shows, youth were consistently overexposed to beer, distilled spirits and alcopops advertising in national magazines. Wine advertising consistently underexposed youth, demonstrating the feasibility of reaching magazine readers over the legal drinking age without overexposing underage youth. Levels of youth overexposure to beer, distilled spirits and alcopops advertising dropped substantially in 2004, which is likely the result of implementing the 30% maximum for audiences under 21 adopted by beer, distilled spirits and wine industry trade associations by the end of 2003.



<sup>15</sup> Magazine titles and editions included in this analysis were those for which TNS Media Intelligence tracked advertising occurrences and for which MRI provided readership estimates. For more information on methodology, see Appendix A. For a list of the magazines included in the analysis, see Appendix C.

**Figure 1: Youth Overexposure to Alcohol Advertising in National Magazines, United States, 2001 to 2004**



Sources: TNS Media Intelligence, 2001-2004; MRI Adult Study, Spring 2002-2005; MRI TwelvePlus, 2001-2004; MRI Teenmark, 2001

In addition to the decline in youth overexposure, youth exposure to magazine advertising for alcohol fell as well: between 2001 and 2004, overall youth exposure dropped by 31%, from 16,057 GRPs to 11,026 GRPs. Table 2 provides GRPs for the 12-to-20, 21-to-34, 21-and-over, and 35-and-over age groups. The young adult group—ages 21 to 34—has consistently received the most exposure to alcohol advertising in magazines, although individual brands have sometimes delivered greater exposure to youth than to young adults (see Table 5 below). As the GRP ratios in the last column of Table 2 illustrate, the difference between the exposure of young people and members of their parents' age group, readers age 35 and over, has shrunk substantially. In 2001, young people ages 12 to 20 saw more than twice as much beer and distilled spirits advertising per capita and nearly two and a half times more alcopops advertising than members of the 35-and-over age group. In 2004, youth saw only 49% more beer advertising, 32% more spirits advertising and 76% more advertising for alcopops per capita than members of their parents' age group.





**Table 2: Exposure to Alcohol Advertising in National Magazines by Age Group, United States, 2001 to 2004**

Beverage Type	Gross Rating Points (GRPs)				GRP Ratios		
	Youth Ages 12-20	Adults 21+	Young Adults Ages 21-34	Adults 35+	12-20: 21+	12-20: 21-34	12-20: 35+
<b>2001</b>							
Beer and Ale	1,870	1,227	2,064	914	1.52	0.91	2.04
Distilled Spirits	13,175	9,916	15,892	7,680	1.33	0.83	1.72
Alcopops	407	250	480	164	1.63	0.85	2.49
Wine	606	1,359	1,285	1,386	0.45	0.47	0.44
<b>Total</b>	<b>16,057</b>	<b>12,752</b>	<b>19,720</b>	<b>10,144</b>	<b>1.26</b>	<b>0.81</b>	<b>1.58</b>
<b>2002</b>							
Beer and Ale	1,840	1,171	2,049	842	1.57	0.90	2.19
Distilled Spirits	11,324	9,234	14,809	7,143	1.23	0.76	1.59
Alcopops	668	388	787	239	1.72	0.85	2.80
Wine	544	1,637	1,604	1,649	0.33	0.34	0.33
<b>Total</b>	<b>14,376</b>	<b>12,430</b>	<b>19,249</b>	<b>9,873</b>	<b>1.16</b>	<b>0.75</b>	<b>1.46</b>
<b>2003</b>							
Beer and Ale	2,425	1,633	2,881	1,163	1.48	0.84	2.08
Distilled Spirits	8,618	7,194	11,422	5,601	1.20	0.75	1.54
Alcopops	193	101	210	60	1.92	0.92	3.24
Wine	381	1,134	1,086	1,152	0.34	0.35	0.33
<b>Total</b>	<b>11,616</b>	<b>10,062</b>	<b>15,598</b>	<b>7,976</b>	<b>1.15</b>	<b>0.74</b>	<b>1.46</b>
<b>2004</b>							
Beer and Ale	2,085	1,812	2,925	1,396	1.15	0.71	1.49
Distilled Spirits	7,921	7,227	10,488	6,009	1.10	0.76	1.32
Alcopops	443	332	545	252	1.33	0.81	1.76
Wine	578	1,514	1,311	1,590	0.38	0.44	0.36
<b>Total</b>	<b>11,026</b>	<b>10,885</b>	<b>15,270</b>	<b>9,247</b>	<b>1.01</b>	<b>0.72</b>	<b>1.19</b>

Sources: TNS Media Intelligence, 2001-2004; MRI Adult Study, Spring 2002-2005; MRI TwelvePlus, 2001-2004; MRI Teenmark, 2001

## VI. Advertising in Excess of the 30% Standard

In September 2003, the Beer Institute and the Distilled Spirits Council of the United States (DISCUS) announced that henceforth their voluntary codes of marketing practice would mandate a 30% maximum underage audience (or 70% minimum legal-aged audience) for beer and spirits advertising. (The Wine Institute's code has had such a threshold in place since 2000.) By 2004, only 3% of ads and less than 2% of spending were in magazines with youth audiences greater than 30% (see Appendix C for a list of magazines and youth audience compositions). This new standard also reduced the amount of total youth exposure accounted for by ads placed in these publications, from 21% in 2001 to 4% in 2004. At the same time, in 2004, three brands placed more than half their ads and spent more than half their advertising dollars in publications with youth audiences in excess of 30%. Specifically, in 2004, Navan French Cognac Liqueur placed both of its two ads (100%) and spent all of its \$169,560 in measured expenditures in publications exceeding a 30% composition of youth ages 12 to 20; Hennessy Very Special Cognac placed 10 of its 16 ads (63%) and spent \$534,720 of its total brand expenditures of \$866,190 in publications exceeding a 30% composition of youth ages 12 to 20; Alizé Bleu Liqueur placed seven of its 10 ads (70%) and spent \$399,829 of its total brand expenditures of \$706,484 in publications exceeding a 30% composition of youth ages 12 to 20.

**Table 3: Alcohol Advertising Placements and Expenditures in Publications  
With Greater Than 30% Youth Audience Compositions, United States, 2001 to 2004**

Year	Total			>30% Youth Ages 12-20					
	Ads	Dollars	Youth Ages 12-20 GRPs	Ads Above 30%	% of Total Ads	Dollars Above 30%	% of Total Dollars	Youth Ages 12-20 GRPs Above 30%	% of Youth Ages 12-20 GRPs
2001	3,616	\$320,379,579	16,057	382	10.6%	\$30,000,933	9.4%	3,340	20.8%
2002	3,598	\$343,945,795	14,376	389	10.8%	\$37,983,478	11.0%	3,680	25.6%
2003	3,241	\$326,058,509	11,616	223	6.9%	\$19,766,359	6.1%	1,797	15.5%
2004	3,283	\$360,965,090	11,026	101	3.1%	\$6,219,480	1.7%	470	4.3%

Sources: TNS Media Intelligence, 2001-2004; MRI Adult Study, Spring 2002-2005; MRI TwelvePlus, 2001-2004; MRI Teenmark, 2001

## VII. Advertising in Excess of a 15% Proportional Standard

In September of 2003, Beer Institute President Jeff Becker, referring to the industry's maximum youth audience standard, testified to Congress that "[t]his standard reflects the demographics of the U.S. population"<sup>16</sup> because 70% of the U.S. population is over the age of 21. In fact, of the remaining 30%, approximately 13% is between the ages of 12 and 20, and 17% is under age 12. The standard sources for audience demographics for magazine readership only measure the population age 12 and above. Because of this, although magazine advertising undoubtedly generates some exposure to the population under age 12, the only measurable standard is one that would apply to persons age 12 and over. According to the U.S. Census Bureau, in the year 2000, young people ages 12 to 20 were 15.6% of the total population 12 and above.<sup>17</sup> Thus, a standard that truly reflects the demographics of the U.S. population as measured for magazine readership would be approximately 15%.

The amount of alcohol advertising placed in publications with youth audiences in excess of 15% has also fallen substantially since 2001, from 52% of ads and 59% of dollars in 2001 to 42% of ads and 48% of dollars in 2004 (see Appendix C for a list of magazines and youth audience compositions). Despite this decline, this advertising still accounts for the lion's share of youth exposure to alcohol advertising in magazines. The percentage of youth exposure coming from these ads has fallen from 89% in 2001 to 83% in 2004.

**Table 4: Alcohol Advertising Placements and Expenditures in Publications  
With Greater Than 15% Youth Audience Compositions, United States, 2001 to 2004**

Year	Total			>15% Youth Ages 12-20					
	Ads	Dollars	Youth Ages 12-20 GRPs	Ads Above 15%	% of Total Ads	Dollars Above 15%	% of Total Dollars	Youth Ages 12-20 GRPs Above 15%	% of Youth Ages 12-20 GRPs
2001	3,616	\$320,379,579	16,057	1,867	51.6%	\$190,224,222	59.4%	14,338	89.3%
2002	3,598	\$343,945,795	14,376	1,855	51.6%	\$199,166,793	57.9%	12,532	87.2%
2003	3,241	\$326,058,509	11,616	1,494	46.1%	\$169,668,845	52.0%	10,094	86.9%
2004	3,283	\$360,965,090	11,026	1,373	41.8%	\$173,049,200	47.9%	9,102	82.6%

Sources: TNS Media Intelligence, 2001-2004; MRI Adult Study, Spring 2002-2005; MRI TwelvePlus, 2001-2004; MRI Teenmark, 2001

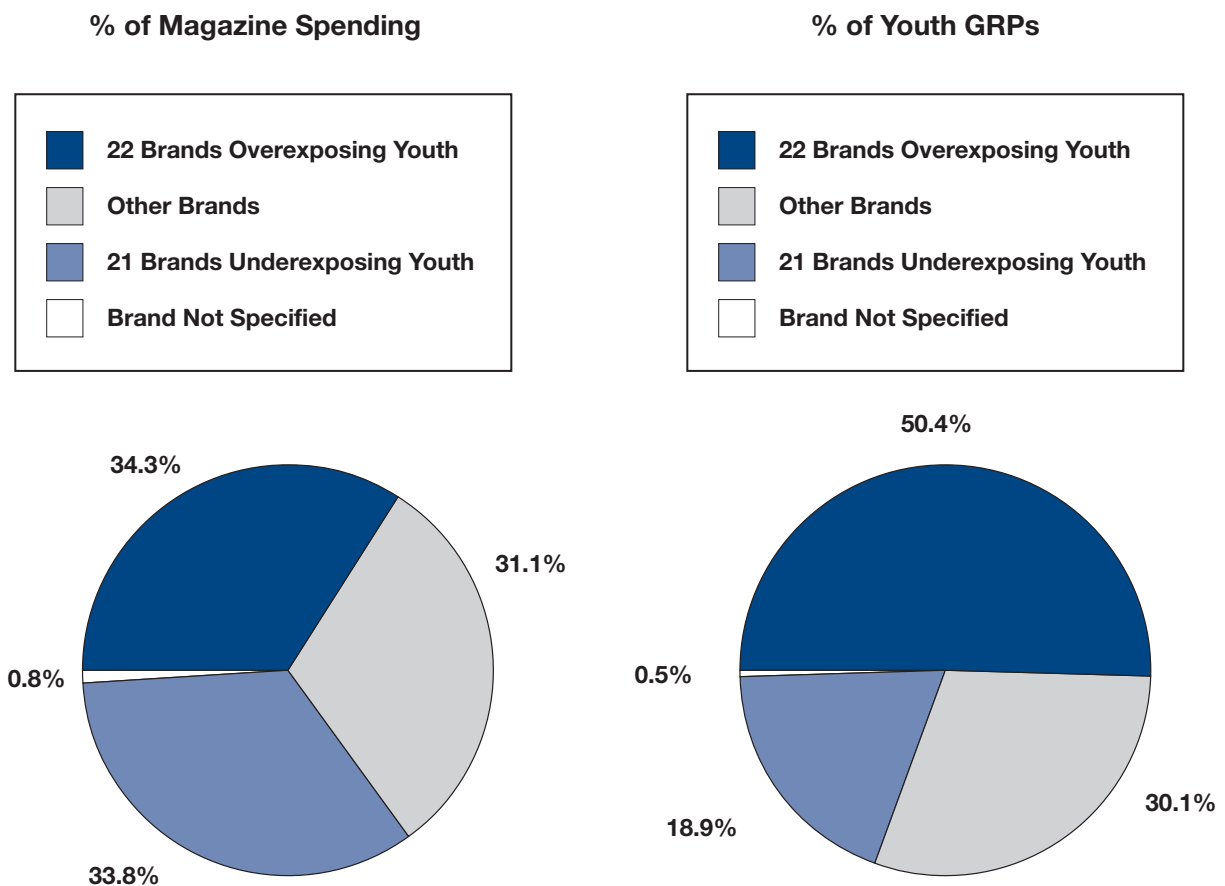
<sup>16</sup> J.G. Becker, Statement at Hearing Before the Subcommittee on Substance Abuse and Mental Health Services of the Senate Committee on Health, Education, Labor and Pensions, 108th Cong., September 30, 2003.

<sup>17</sup> U.S. Census Bureau, PCT3, Sex by age [209]—Universe: total population, Census 2000 summary file 2 (SF 2) 100-percent data.

## VIII. Brands Accounting for More Than Half of Youth Exposure

By 2004, most youth exposure was coming from the advertising of a few brands. Out of 211 alcohol brands advertising in magazines in 2004, 22 brands accounted for more than 50% of youth exposure and about a third of all spending. In contrast, another 21 brands also accounted for about a third of spending but generated less than 20% of youth exposure. The remaining 168 brands generated roughly 30% of youth exposure and spent approximately 31% of all alcohol advertising dollars in magazines in 2004.

**Figure 2: Youth Exposure to Alcohol Advertising in National Magazines and Spending by Brand Group, United States, 2004**



Source: TNS Media Intelligence 2004; MRI Adult Study, Spring 2005; MRI TwelvePlus, 2004



The 22 brands that generated more than half of youth exposure to alcohol advertising in magazines in 2004 are listed in Table 5. Three of these brands—Miller High Life, Heineken and Hennessy Very Special Cognac—also delivered as much or more exposure to 12- to 20-year-olds as to 21- to 34-year-olds, the group sometimes cited by industry sources as the target for this kind of advertising.<sup>18</sup> In terms of relative levels of exposure in the age groups nearest to the legal drinking age, all but four of the 22 brands delivered as much or more exposure to 18- to 20-year-olds as to 21- to 24-year-olds.

**Table 5: Overexposing Alcohol Brands Generating More Than Half of Youth Exposure to Alcohol Advertising in Magazines, United States, 2004**

Brand	Ads	Dollars	Cumulative % of Youth Exposure	Cumulative % of Spending	GRPs					GRP Ratios		
					Youth Ages 12-20	Adults Age 21+	Young Adults Ages 21-34	Youth Ages 18-20	Young Adults Ages 21-24	12-20: 21+	12-20: 21-34	18-20: 21-24
Jack Daniel's Whiskey	111	\$15,251,636	6.1%	4.2%	674	576	804	1,016	979	1.17	0.84	1.04
Rums of Puerto Rico	87	\$ 7,558,700	10.6%	6.3%	495	321	626	811	808	1.54	0.79	1.00
Miller Genuine Draft	72	\$14,106,794	14.4%	10.2%	423	319	575	692	733	1.33	0.74	0.94
Skyy Vodka	39	\$ 6,213,623	18.2%	11.9%	414	274	438	603	536	1.51	0.94	1.13
Crown Royal Whiskey	97	\$ 9,899,214	21.9%	14.7%	405	351	464	561	538	1.15	0.87	1.04
Absolut Flavored Vodkas	85	\$11,331,578	25.3%	17.8%	383	307	472	582	554	1.24	0.81	1.05
Skyy Flavored Vodkas	24	\$ 3,172,134	27.9%	18.7%	277	214	302	386	346	1.29	0.92	1.12
Bacardi Flavored Rums	48	\$ 4,608,126	30.2%	20.0%	255	152	298	425	377	1.68	0.85	1.13
Miller Lite	56	\$ 7,875,935	32.2%	22.2%	230	200	353	388	420	1.15	0.65	0.92
Remy Red Cognac	26	\$ 3,065,338	34.0%	23.0%	196	121	204	289	243	1.62	0.96	1.19
Cointreau Liqueur	33	\$ 4,902,398	35.8%	24.4%	193	135	222	292	263	1.44	0.87	1.11
Skyy Sport	29	\$ 3,665,709	37.5%	25.4%	193	129	246	321	304	1.49	0.78	1.06
Smirnoff Twisted Five Malt Beverage	35	\$ 5,532,964	39.1%	26.9%	177	124	214	276	255	1.43	0.83	1.08
Heineken Beer	18	\$ 3,306,725	40.7%	27.8%	171	102	170	238	218	1.68	1.00	1.09
1800 Reserva Reposado Tequila	21	\$ 2,692,166	42.0%	28.6%	151	83	175	251	237	1.81	0.86	1.06
Captain Morgan Spiced Rum	32	\$ 3,280,886	43.4%	29.5%	151	104	209	275	271	1.45	0.72	1.02
Jose Cuervo Especial Tequila	35	\$ 3,760,682	44.7%	30.5%	140	96	200	252	270	1.46	0.70	0.93
Miller High Life	22	\$ 2,710,999	45.9%	31.3%	139	111	132	171	154	1.25	1.05	1.10
Yellow Tail Wines	32	\$ 3,163,342	47.1%	32.2%	130	87	142	185	164	1.49	0.92	1.13
Stolichnaya Vodkas	23	\$ 3,658,508	48.3%	33.2%	126	96	193	230	256	1.31	0.65	0.90
Miller High Life Light Beer	29	\$ 3,148,645	49.3%	34.0%	119	114	127	153	147	1.05	0.94	1.04
Hennessy Very Special Cognac	16	\$ 866,190	50.4%	34.3%	119	48	93	149	128	2.47	1.28	1.17

Sources: TNS Media Intelligence, 2004; MRI Adult Study, Spring 2005; MRI TwelvePlus, 2004

<sup>18</sup> See, e.g., H. Riell, "Half Full or Half Empty?," *Beverage Dynamics*, 112, no. 3 (May 1, 2002): 8; R. Zimoch, "Malternatives: A new brew rides to the rescue," *Grocery Headquarters* 68, no. 4 (April 1, 2002): 83; S. Theodore, "Beer's on the up and up," *Beverage Industry* 92, no. 4 (April 1, 2001): 18-24.

For the purposes of comparison, 21 other high-spending brands are listed in Table 6. Together, these brands delivered less than 20% of alcohol advertising exposure to youth in 2004. Spending virtually the same amount of money as the brands listed in Table 5, these brands avoided overexposing youth ages 12 to 20 compared to either adults age 21 and over or adults ages 21 to 34. Only six of the brands reached more 18- to 20-year-olds with their advertising than 21- to 24-year-olds on a per capita basis.

**Table 6: Underexposing Brands Generating Less Than 20% of Youth Exposure to Alcohol Advertising in Magazines, United States, 2004**

Brand	Ads	Dollars	Cumulative % of Youth Exposure	Cumulative % of Spending	GRPs					GRP Ratios		
					Youth Ages 12-20	Adults Age 21+	Young Adults Ages 21-34	Youth Ages 18-20	Young Adults Ages 21-24	12-20: 21+	12-20: 21-34	18-20: 21-24
Absolut Vodka	130	\$14,757,594	2.4%	4.1%	268	407	411	400	409	0.66	0.65	0.98
Michelob Ultra Light Beer	106	\$8,982,566	4.8%	6.6%	263	296	415	477	453	0.89	0.63	1.05
Ketel One Vodka	125	\$7,020,631	6.6%	8.5%	194	257	311	321	322	0.76	0.62	1.00
Three Olives Vodka	53	\$8,168,157	8.5%	10.8%	214	247	265	303	278	0.87	0.81	1.09
Turning Leaf Wines	69	\$8,303,456	9.3%	13.1%	90	216	177	169	156	0.41	0.51	1.08
Evan Williams Kentucky Straight Bourbon Whiskey	47	\$4,574,613	11.1%	14.4%	195	200	255	302	295	0.98	0.76	1.02
Grey Goose Vodka	89	\$14,542,153	12.4%	18.4%	143	199	238	245	246	0.72	0.60	0.99
Woodbridge Wines	51	\$4,747,620	12.7%	19.7%	34	193	142	73	98	0.18	0.24	0.74
Chivas Regal 12	42	\$5,143,163	13.5%	21.1%	89	128	152	142	147	0.70	0.59	0.96
Redwood Creek Wines	46	\$4,162,506	13.8%	22.3%	28	123	97	59	75	0.22	0.28	0.78
Glenlivet Scotch Whiskey	36	\$4,430,769	14.5%	23.5%	83	123	132	139	130	0.68	0.63	1.06
Grey Goose Flavored Vodkas	46	\$4,611,263	15.5%	24.8%	109	120	153	172	160	0.91	0.71	1.07
Level Vodka	44	\$4,710,557	16.1%	26.1%	65	109	140	126	151	0.60	0.46	0.83
Bombay Sapphire Gin	48	\$5,245,064	16.5%	27.5%	48	108	128	105	132	0.44	0.37	0.80
Black Swan Wines	30	\$3,670,054	16.8%	28.6%	27	107	87	46	63	0.25	0.31	0.73
Sutter Home Wines	23	\$2,334,158	17.0%	29.2%	25	98	81	32	57	0.25	0.30	0.56
Ciroc Vodka	41	\$4,954,206	17.6%	30.6%	70	98	111	107	105	0.72	0.63	1.01
Hendricks Gin	41	\$1,496,040	17.7%	31.0%	12	96	95	37	67	0.13	0.13	0.55
Glenfiddich Solera Reserve Scotch Whiskey	44	\$3,399,697	18.0%	31.9%	31	94	94	69	87	0.33	0.33	0.79
Grand Marnier Liqueur	38	\$3,818,824	18.2%	33.0%	18	86	67	43	57	0.22	0.27	0.77
Jameson Irish Whiskey	25	\$2,975,246	18.9%	33.8%	82	83	128	139	147	0.98	0.64	0.94

Sources: TNS Media Intelligence, 2004; MRI Adult Study, Spring 2005; MRI TwelvePlus, 2004

## IX. Conclusion

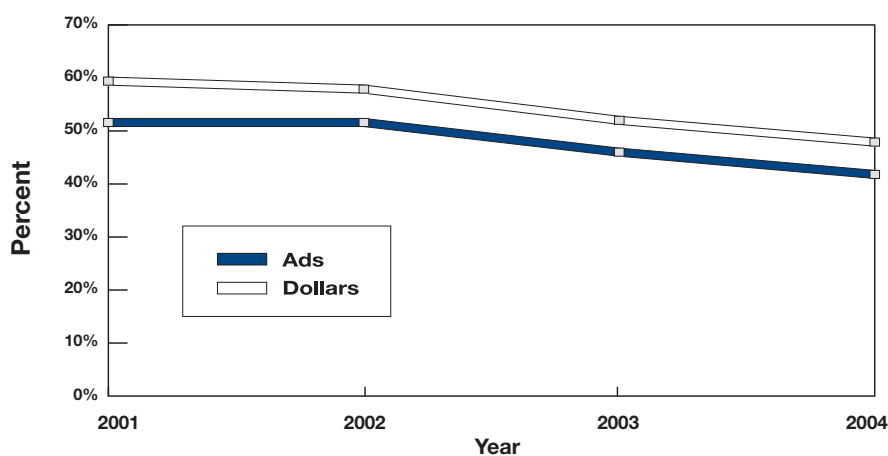
Youth exposure to alcohol advertising in magazines is declining. While young people are still exposed to more alcohol advertising per capita in magazines than adults of the legal drinking age, the magnitude of this overexposure has fallen substantially. As research evidence grows that exposure to alcohol advertising increases the odds that young people will start drinking, this decline is good news for parents, teachers, and young people themselves.

In 2003, the National Research Council and Institute of Medicine, in their landmark report *Reducing Underage Drinking: A Collective Responsibility*, called on the U.S. Department of Health and Human Services to monitor youth exposure to alcohol advertising and to include the findings in an annual report to Congress on underage drinking.<sup>19</sup> Independent monitoring of youth exposure to alcohol advertising is having an effect. Partly in response to the Federal Trade Commission's finding in 1999 that some alcohol companies had no data at all regarding the demographics of audiences for their advertising, the Center on Alcohol Marketing and Youth has, since its founding in 2002, released 16 reports focused specifically on monitoring levels of youth exposure to alcohol advertising. Both the Beer Institute and the Distilled Spirits Council of the United States have, in the past year, adopted detailed guidelines for their member companies to follow regarding placement of alcohol advertising. The Federal Trade Commission has announced plans to solicit information from up to 12 of the largest companies regarding their compliance with the 30% placement standard.

Still, a few brands continue to spend heavily in magazines disproportionately popular with underage youth, exposing large numbers of young people under the legal drinking age to their advertising. In 2003, the National Research Council and Institute of Medicine recommended that alcohol companies adopt a 25% maximum for youth audiences immediately, reflecting best practice in the industry at that time, and move steadily towards a 15% maximum.<sup>20</sup> Three years later, although many brands have placed much of their advertising below the 30% maximum, no company has been willing to accept a threshold lower than 30%. A co-chair of the Youth Access to Alcohol committee of the National Association of Attorneys General, Attorney General Steven Rowe of Maine, recently endorsed the 15% threshold in the pages of *The New York Times*, arguing that "the 30 percent standard exposes too many underage drinkers to ads for alcohol."<sup>21</sup>

Figure 3 shows the decline in both the percentage of ads and the percentage of dollars overexposing youth from 2001 to 2004. This demonstrates that alcohol companies can change their advertising practices. These changes need to extend throughout the industry and across all brands if young people are to be effectively shielded from undue exposure to alcohol advertising.

**Figure 3: Percentages of Alcohol Ads and Dollars in Magazines With Disproportionately High Youth Readership, United States, 2001 to 2004**



Sources: TNS Media Intelligence, 2001-2004; MRI Adult Study, Spring 2002-2005; MRI TwelvePlus, 2001-2004; MRI Teenmark, 2001

<sup>19</sup> National Research Council and Institute of Medicine, *Reducing Underage Drinking: A Collective Responsibility*, R.J. Bonnie and M.E. O'Connell, eds. (Washington, DC: National Academies Press, 2004), 240.

<sup>20</sup> *Ibid.*, 138-140.

<sup>21</sup> M. Warner, "Critics say beer spots exploit loopholes," *New York Times*, 29 March 2006, C4.

# Appendix A: Methodology

## Research Process

This research methodology followed a process similar to that of a media planner. First, advertising spending for all brands in each alcoholic beverage category was investigated. Next, audience research data was used to quantify the demographic composition of audiences reached with each brand's advertising schedule.

## Counting Ads—Using TNS Media Intelligence

Advertising occurrence data from TNS Media Intelligence (formerly CMR) were used to identify brand advertising by publication and date. TNS Media Intelligence measures over 300 publications in addition to television and other media. TNS Media Intelligence and its predecessor companies have been an advertising-industry standard reference for decades.

For this report, only alcoholic beverage product advertising in national or full editions of publications, as measured by Mediamark Research Inc. (MRI), was included. Non-product advertising was not included. MRI is the leading source of U.S. magazine audience estimates for consumer advertising. Advertising in demographic and regional editions of magazines was omitted since it is not practical to assign a national audience estimate to ads appearing in only a portion of a magazine's circulation.

Only those publications reported in the MRI Teenmark Study for 2001, the MRI TwelvePlus Studies for 2001 through 2004, or the MRI Spring 2002 through Spring 2005 Adult Studies were included in the analysis. By restricting the analysis to product advertising in full-run editions of MRI-reported audiences, the report tracks 80% of magazine advertising expenditures in 2001, 85% in 2002, 83% in 2003, and 79% in 2004.

**Table 7: Disposition of Alcohol Advertising Expenditures in National Magazines, United States, 2001 to 2004**

	2001		2002		2003		2004		2001-2004	
	Dollars	% of Dollars	Dollars	% of Dollars	Dollars	% of Dollars	Dollars	% of Dollars	Dollars	% of Dollars
Alcohol Ads	\$402,277,846	100.0%	\$405,077,640	100.0%	\$394,282,425	100.0%	\$456,646,541	100.0%	\$1,658,284,452	100.0%
National Editions Only	\$375,134,784	93.3%	\$378,990,704	93.6%	\$359,334,695	91.1%	\$399,747,702	87.5%	\$1,513,207,885	91.3%
Product Ads Only	\$371,409,764	92.3%	\$369,397,092	91.2%	\$347,375,282	88.1%	\$387,934,408	85.0%	\$1,476,116,546	89.0%
Reported by MRI	\$320,379,579	79.6%	\$343,945,795	84.9%	\$326,058,509	82.7%	\$360,965,090	79.0%	\$1,351,348,973	81.5%

Sources: TNS Media Intelligence, 2001-2004; MRI Adult Study, Spring 2002-2005; MRI TwelvePlus, 2001-2004; MRI Teenmark, 2001

## Measuring Audiences

### Sources of Magazine Audience Data

MRI conducts ongoing studies of adults and teens to ascertain publication audience readership. These data are published either twice per year (for adults 18 and older) or annually (for teens). Audience estimates from the following surveys were used for this report:

#### 2001 Advertising Occurrences

- For persons age 18 and over: Spring 2002 Adult Study (representing surveys from March 2001 through March 2002)
- For teens ages 12 to 17: Teenmark and TwelvePlus 2001 Studies (representing surveys from the summers of 2000 and 2001). The Teenmark Study was used only for *Maxim*, which was not reported in the 2001 TwelvePlus Study.

#### 2002 Advertising Occurrences

- For persons age 18 and over: Spring 2003 Adult Study (representing surveys from March 2002 through March 2003)
- For teens ages 12 to 17: TwelvePlus 2002 Study (representing surveys from the summers of 2001 and 2002)

### 2003 Advertising Occurrences

- For persons age 18 and over: Spring 2004 Adult Study (representing surveys from March 2003 through March 2004)
- For teens ages 12 to 17: TwelvePlus 2003 Study (representing surveys from the summers of 2002 and 2003)

### 2004 Advertising Occurrences

- For persons age 18 and over: Spring 2005 Adult Study (representing surveys from March 2004 through March 2005)
- For teens ages 12 to 17: TwelvePlus 2004 Study (representing surveys from the summers of 2003 and 2004)

While the Spring Adult, Teenmark and TwelvePlus Studies all measure for ages 18 to 19, we used the more widely accepted Spring Adult Study as the source for ages 18 to 19.

### **Notes on Magazine Audience Research Methodology**

The adult survey methodology uses a “recent reading” technique as part of a personal interview, which identifies readers in an average issue of each publication. The survey methodology for readers under age 18 (used by the Teenmark and TwelvePlus Studies), uses a household sample drawn from the Adult Study and employs a “frequency of reading” process with a mailed questionnaire in which respondents indicate, for those publications they have read or looked into at all within the past six months, how many (out of an average four issues) they have read. The raw data are weighted such that a respondent claiming to have read one out of four issues is assigned a .25 probability of being in the average audience for the magazine, one claiming to have read two out of four receives a .50 probability, and so on. The two surveys represent differing methodologies, a common feature of advertiser-supported media surveys, but they are also the most commonly accepted and used magazine audience surveys for their respective markets.

### **Ad Exposure Measures**

To calculate audience delivery, publication audience estimates were credited for discrete demographic cells for each publication issue in which a brand was advertised. Multiple insertions for a given brand within a single issue were credited only one time so as not to overstate audience exposure. No differentiation was made between ad type (size, color, etc.), since differential advertising impact measures based on advertising unit are not universally accepted.

### **Reach Calculations**

Audience reach estimates were calculated using IMS (Interactive Market Systems) print media evaluation applications and MRI Spring Adult, TwelvePlus and Teenmark Studies. IMS is the leading provider of print media evaluation software for advertising.

## **Alcohol Category and Brand Classifications**

Category and brand classifications were defined by *Impact*, an industry reference published by M. Shanken Communications Inc., so that the categories and brands represented in this report would be consistent with the classifications used by the industry. The industry itself is experiencing significant change, primarily in the relatively new alcopop or “malternative” beverages, which are derived from a complex production process involving a malt base that is stripped of its malt characteristics, including much of its alcohol, and then augmented with flavorings and sweeteners, including flavorings that contain distilled alcohol. These are frequently marketed through joint agreements between distillers and brewers and have been grouped by *Impact* in recent years either as “low-alcohol refreshers” (2002) or as “ready-to-drink flavored alcoholic beverages” (2003 and 2004).

## **Magazines and Ads Not Counted**

Certain publications with significant alcohol advertising as tracked by TNS Media Intelligence are not currently measured by MRI and were therefore not included in this analysis.

Of the 153 magazines with alcohol product advertising in 2001 that were monitored by TNS Media Intelligence, 98 were measured for media audiences by MRI. For 2002, there were 146 monitored magazines with alcohol advertising, of which 108 had national editions that were measured by MRI; for 2003, there were 140 monitored magazines with alcohol advertising, of which 106 had national editions that were measured by MRI; for 2004, there were 153 monitored publications with alcohol product advertising, of which 114 had national editions that were measured by MRI.

The unmeasured publications and editions represent \$51.0, \$50.8, \$55.0 and \$89.2 million in product advertising for alcoholic beverages in 2001, 2002, 2003 and 2004, respectively, or 14%, 13%, 14% and 20% of all magazine product advertising reported by TNS Media Intelligence.

Audiences for youth ages 12 to 17 for many publications with substantial alcohol advertising are not measured by MRI; for these publications, data are only available for ages 18 and older. Because this analysis is based only on published, industry-accepted survey data, we have not attempted to estimate the ages-12-to-17 audiences for those publications, although all may be presumed to have at least some readership under the age of 18.

An unknown amount is spent on many publications that were not monitored by TNS Media Intelligence or measured by MRI for all four years of advertising tracked in this report, such as *Blender*, *XXL*, *Smooth*, and *King*.

## Appendix B: Glossary of Advertising Terms

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Advertising exposure is most commonly measured in terms of reach, frequency and rating points. This report makes use of publication readership data, which are based on audiences, not magazine circulation. Circulation refers to the number of issues purchased or distributed; audience refers to the average number of readers, typically three to 10 times greater than circulation.

### **Target Audience(s)**

The target audience for advertising provides a description of the demographics (age, gender, income, etc.) of the people the advertiser seeks to reach with its message.

### **Reach**

Reach is used to describe the number or percentage of a target population that

has the potential to see an ad or a campaign through readership of selected media.

### **Frequency**

Frequency indicates the number of times individuals are exposed to an ad or campaign; it is most often expressed as an average number of exposures.

### **Rating Points**

Rating points, or GRPs (gross rating points), provide a measure of total advertising exposure and incorporate the impact of both reach and frequency. One rating point equals the number of exposures equivalent to 1% of a target population, and it may include repeat exposures. In advertising math, reach x frequency = GRPs: 75 reach (% of the potential audience) x 6.8 frequency (aver-

age number of exposures) = 510 GRPs or rating points.

### **Composition**

Composition is a measure of audience concentration for a particular demographic. If 41% of *Vibe's* audience is between the ages of 12 and 20, then the 12-to-20 age composition of *Vibe* is 41%.

### **Composition Index**

Composition index (or audience concentration relative to population) is a statistic that compares the demographic composition of a magazine audience to the composition of the base population. If a magazine's composition is greater than the population for a particular age cell, the index is greater than 100; if it is less than the population, it is less than 100.



## Appendix C: Alcohol Ads by Publication and Year; Publications Sorted by Youth-Ages-12-to-20 Composition

% Youth Ages 12 to 20	Alcohol Ads by Year					Most Recently Reported Youth-Ages-12-to-20 Composition
	Publication	2001	2002	2003	2004	
<b>Greater Than 30%</b>						
<i>The Source</i>			7	17	24	42.9%
<i>Vibe</i>	52	60	81	24	217	37.4%
<i>Allure</i>	8	7	8	2	25	33.3%
<i>Spin</i>	81	56	48	7	192	32.8%
<i>Jane</i>		49	33	51	133	32.5%
<i>ESPN The Magazine</i>	138	130	73	20	361	30.0%
<b>Greater Than 15% and Less Than 30%</b>						
<i>Rolling Stone</i>	198	136	112	37	483	29.7%
<i>Automobile</i>	8	19	6	2	35	28.4%
<i>Motor Trend</i>	4				4	26.6% *
<i>Auto Week</i>				2	2	26.4%
<i>Car &amp; Driver</i>	10	7	6	12	35	26.2%
<i>Hot Rod</i>			2	8	10	25.6%
<i>Stuff</i>		120	112	115	347	25.1%
<i>Cosmopolitan</i>	99	94	68	59	320	24.7%
<i>Vogue</i>	49	47	43	41	180	23.5%
<i>Us Weekly</i>	67	59	67	96	289	22.2%
<i>Road &amp; Track</i>	7	1	4	2	14	22.0%
<i>Modern Bride</i>		1		2	3	22.0%
<i>Brides</i>	6	1	1	4	12	21.8%
<i>Maxim</i>	172	157	124	137	590	21.8%
<i>Glamour</i>	21	10	8	33	72	21.7%
<i>Sports Illustrated</i>	156	159	148	131	594	21.7%
<i>FHM Magazine</i>		105	115	177	397	21.2%
<i>Fitness</i>			3	4	7	20.4%
<i>InStyle</i>	116	108	67	65	356	20.3%
<i>Sporting News</i>	46	37	71	67	221	20.2%
<i>Ebony</i>	32	27	25	23	107	20.0%
<i>Marie Claire</i>	43	35	30	5	113	19.5%
<i>Elle</i>	39	27	4	4	74	19.5%
<i>Entertainment Weekly</i>	137	101	94	75	407	18.4%
<i>Premiere</i>	36	47	43	41	167	18.4%
<i>Jet</i>	40	31	31	43	145	18.2%
<i>Popular Science</i>	9	12	9	10	40	17.4%
<i>Essence</i>	26	17	16	17	76	16.6%
<i>Star</i>				3	3	16.4%
<i>Shape</i>		4	1	8	13	16.3%
<i>Self</i>	10	13	12	4	39	15.6%
<i>People</i>	44	25	9	23	101	15.6%
<i>Country Weekly</i>	14	17		2	33	15.4%

continued

% Youth Ages 12 to 20

Alcohol Ads by Year

Most Recently  
Reported Youth-  
Ages-12-to-20  
Composition

Publication	2001	2002	2003	2004	Total Ads	
<b>Less Than 15%</b>						
GQ	140	150	134	110	534	14.7%
Men's Fitness	3	2	6	15	26	14.2%
Popular Mechanics	17	15	15	20	67	14.2%
Harper's Bazaar	24	13	2	1	40	13.9%
Bridal Guide	1	2	3		6	12.7% ***
Time	10	18	23	32	83	12.6%
Vanity Fair	59	82	84	62	287	12.4%
Penthouse	12	7			19	11.6% **
W Magazine			48	34	82	11.6%
Yahoo! Internet Life	49				49	11.4% *
Esquire	77	63	78	73	291	11.4%
Men's Health		2	6	8	16	10.7%
Playboy	180	138	102	131	551	10.7%
Newsweek	12	8	3	4	27	10.2%
Ski Magazine	34	49	31	28	142	9.2%
U.S. News & World Report		2	2	1	5	9.2%
Backpacker		1			1	8.7% **
Ducks Unlimited	5	5	4	5	19	8.6%
Biography	3	12			15	8.0% **
Bassmaster		7	23	21	51	8.0%
Redbook	1	8	2		11	7.6% ***
O, Oprah Magazine		21	11	19	51	7.1%
National Geographic Traveler	4	6	10	7	27	7.0%
PC Magazine	10	7	5	2	24	7.0%
Popular Photography	1				1	7.0% *
Real Simple		9	9	23	41	6.6%
Men's Journal	121	64	55	76	316	6.2%
Runner's World	3	3	8	16	30	6.1%
Better Homes and Gardens		3			3	5.6% **
Outdoor Life	25	18	5	12	60	5.6%
Discover	12	7	8	3	30	5.5%
Health	4				4	5.5% *
Wired			13	28	41	5.4%
Skiing	51	39	38	27	155	5.2%
Tennis	14	5	7	3	29	5.1%
Popular Photography & Imaging				1	1	5.1%
Scientific American	9	6	5	3	23	4.9%
Southern Accents	3				3	4.9% *
American Way	3	3			6	4.9% **
Field & Stream	32	28	21	33	114	4.8%
Barron's	2	14			16	4.6% **
Boating				2	2	4.5%
Gourmet	37	58	63	63	221	3.9%
Atlantic Monthly	19	8	15	13	55	3.6%
Bicycling		2	5	4	11	3.4%
The New Yorker	76	94	101	90	361	3.4%
Country Home				6	6	3.3%
Smithsonian	17	13	6	5	41	3.3%
Golf Magazine	48	62	81	117	308	3.2%
Ladies' Home Journal				1	1	3.2%
Bon Appetit	68	58	35	58	219	3.1%
Black Enterprise	33	30	38	33	134	3.0%
American Photo	13	9	11	9	42	3.0%

% Youth Ages 12 to 20

Alcohol Ads by Year

Most Recently  
Reported Youth-  
Ages-12-to-20  
Composition

Publication	2001	2002	2003	2004	Total Ads	
<i>Martha Stewart Living</i>	23	36	14	11	84	3.0%
<i>Sky Magazine</i>				6	6	3.0%
<i>Salt Water Sportsman</i>				2	2	3.0%
<i>Yachting</i>	2	5	7	7	21	2.9%
<i>Motor Boating</i>			1		1	2.8% ***
<i>Elle Décor</i>	15	14	15	17	61	2.8%
<i>Victoria</i>	1				1	2.7% *
<i>Town &amp; Country</i>	4	8	12	1	25	2.7%
<i>Forbes</i>	72	51	39	26	188	2.7%
<i>Food &amp; Wine</i>	141	174	114	119	548	2.4%
<i>Southern Living</i>	9	6	1	5	21	2.4%
<i>Midwest Living</i>		4	4	5	13	2.3%
<i>Business Week</i>	22	27	45	63	157	2.3%
<i>Golf Digest</i>	28	36	38	26	128	2.2%
<i>Traditional Home</i>			4	5	9	2.2%
<i>Fortune</i>	50	44	46	59	199	2.1%
<i>Spirit</i>			1	1	2	2.1%
<i>Sunset</i>	17	20	9	13	59	2.0%
<i>Conde Nast Traveler</i>	31	27	42	39	139	2.0%
<i>House &amp; Garden</i>	15	16	25	15	71	1.9%
<i>Money</i>	16	12	20	27	75	1.9%
<i>Outside</i>	37	28	15	18	98	1.8%
<i>Travel Holiday</i>	3				3	1.7% *
<i>Coastal Living</i>	3	4	7	17	31	1.6%
<i>Architectural Digest</i>	10	18	19	20	67	1.3%
<i>Texas Monthly</i>	48	33	34	33	148	1.2%
<i>This Old House</i>		9	6	2	17	1.1%
<i>Cooking Light</i>	24	24	19	33	100	1.0%
<i>Metropolitan Home</i>	14	12	13	8	47	1.0%
<i>Hemispheres</i>				3	3	0.9%
<i>Smart Money</i>	11	7	8	9	35	0.9%
<i>New York Magazine</i>	49	32	16	49	146	0.8%
<i>House Beautiful</i>	4	3	3	2	12	0.8%
<i>Travel &amp; Leisure</i>	50	54	48	48	200	0.7%
<i>Audubon</i>	1				1	0.6% *
<i>Inc.</i>	2	2		12	16	0.4%
<i>Prevention</i>		1	4	3	8	0.2%
<i>Kiplinger's Personal Finance</i>	6	1	7	5	19	0.1%
<i>Family Handyman</i>		6	2	2	10	0.0%
<i>Golf World</i>		4			4	0.0% **
<i>Natural History</i>	8	10	6		24	0.0% ***

**Total 3,616 3,598 3,241 3,283 13,738**

Ads With Youth Composition Greater Than 30% 279 302 250 121 952

Ads With Youth Composition of 15% to 30% 1,389 1,417 1,231 1,252 5,289

Ads With Youth Composition Less Than 15% 1,948 1,879 1,760 1,910 7,497

Sources (Except As Noted): TNS Media Intelligence, 2001-2004; MRI Adult Study, Spring 2005; MRI TwelvePlus, 2004

\* MRI Adult Study, Spring 2002; MRI TwelvePlus, 2001

\*\* MRI Adult Study, Spring 2003; MRI TwelvePlus, 2002

\*\*\* MRI Adult Study, Spring 2004; MRI TwelvePlus, 2003

Occurrence and audience data based on full-run editions only