

# YOUTH EXPOSURE TO ALCOHOL ADVERTISING ON TELEVISION, 2001 TO 2007

## Executive Summary

Youth<sup>1</sup> exposure to alcohol advertising on television has risen by 38% since the Center on Alcohol Marketing and Youth began monitoring this exposure in 2001. From 2001 to 2007, the number of alcohol advertisements seen in a year by the average television-watching 12-to-20-year-old increased from 216 to 301. In 2007, approximately one out of every five alcohol advertisements was placed on programming that youth ages 12 to 20 were more likely per capita to see than adults of the legal drinking age.<sup>2</sup> Almost all of these placements were on cable television, where distilled spirits companies in particular have dramatically increased their alcohol advertising in the past seven years.

Researchers from the Center on Alcohol Marketing and Youth at

Georgetown University (CAMY) and Virtual Media Resources of Natick, Massachusetts (VMR) analyzed the placements of 2,033,931 alcohol product advertisements that aired on television between 2001 and 2007, placed at a cost of \$6.6 billion. Key findings include:

- In 2007, more than 40% of youth exposure to alcohol advertising on television came from ads placed on youth-oriented programming, that is, programs with disproportionately large audiences of 12-to-20-year-olds.
- Almost two-thirds (63%) of these overexposing ad placements in 2007 were on cable television, which generated 95% of youth overexposure to alcohol advertising on television.
- Of the youth overexposure on cable

in 2007, 53% came from beer advertising, and 41% came from distilled spirits advertising.

- In a comparison of individual brands on the basis of their abilities to comply with industry voluntary codes on advertising placement and to avoid youth overexposure in 2007, 10 brands stood out, accounting for 41% of youth overexposure and 52% of advertisements placed above the industry's voluntary standard of a 30% maximum for youth in its audiences.
- Between 2001 and 2007, alcohol companies aired 73,565 “responsibility” advertisements on television. Youth ages 12 to 20 were 22 times more likely to see an alcohol product advertisement than an alcohol-industry-funded “responsibility” advertisement.

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## Why the Concern

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Alcohol is the leading drug problem among young people,<sup>3</sup> and underage drinking is responsible for approximately 5,000 deaths per year among persons under age 21.<sup>4</sup> Young people who start drinking before age 15 are five times more likely than those who wait to drink until age 21 to have alcohol problems later in life, including alcohol dependence and involvement in alcohol-related violence and motor vehicle crashes.<sup>5</sup>

Evidence that exposure to alcohol adver-

tising and marketing increases the likelihood of underage drinking has grown substantially. Since 2001, at least seven peer-reviewed longitudinal studies have found that young people with greater exposure to alcohol marketing are more likely to start drinking than their peers.<sup>6</sup>

In 2003, the National Research Council and Institute of Medicine recommended that alcohol companies move toward a proportional 15% maximum for youth (ages 12 to 20) in audiences of their

advertising.<sup>7</sup> In 2006, 20 state attorneys general echoed that call,<sup>8</sup> followed by the U.S. Surgeon General in 2007.<sup>9</sup> Earlier CAMY research has estimated that if alcohol companies adopted this standard, they would reduce youth exposure to alcohol advertising on television by 20% and decrease their advertising costs by 8%, while maintaining virtually all of their ability to reach 21-to-34- or 21-to-24-year-olds, groups sometimes mentioned as the industry's target audiences for its advertising.<sup>10</sup>

## 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 supported by grants from The Pew Charitable Trusts and the Robert Wood Johnson Foundation to Georgetown University.

CAMY commissioned Virtual Media Resources (VMR) to analyze all alcohol advertising on television from 2001 through 2007. 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. VMR has

received no funding from alcohol or tobacco marketers.

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 analyzes alcohol product and "responsibility" advertising. VMR staff viewed all commercials to ensure that they were appropriately classified by type as corporate, event, "responsibility" or product advertisements. This report does not include alcohol advertising bought directly on local cable systems or cable interconnects, because the standard industry sources licensed for this report do not include these data; such advertising may appear on cable stations that are delivered via cable television. Because distilled spirits advertisers, faced with a voluntary ban on their advertising by the four major broadcast networks, have made particular use of local cable channels, this report may understate their presence on television. The report also does not include advertising data from Spanish-language television networks, such as Univision and Telemundo.

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" indicates 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 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. They incorporate both how many ads the average viewer saw (frequency) and what percentage of a particular population was likely to have viewed the advertising (reach). Further information on sources and methodology used may be found in Appendix A. Appendix B provides a glossary of advertising research terminology.

## Data Sources

Advertising occurrence and audience data for this report came from Nielsen Monitor-Plus and Nielsen Media Research.<sup>11</sup> This report and the December 2007 CAMY report, *CAMY Monitoring Report: Youth Exposure to Alcohol Advertising on Television and in National Magazines, 2001 to 2006*, represent a change from CAMY reports prior to 2005 on alcohol advertising on television, because those reports used TNS Media Intelligence (formerly known as CMR, or Competitive Media Reporting) for advertising occurrence data and Nielsen for audience data. As a result of this change in data source, the numbers in this report for years prior to 2005 may differ slightly from earlier CAMY reports; however, all numbers in this report are internally comparable, being based on Nielsen Monitor-Plus and Nielsen Media Research.

Nielsen Monitor-Plus, a division of VNU, is an industry-standard source for advertising occurrence and expenditure data. It provides date, time, source, program and spending data for each commercial occurrence both locally (210 local markets) and nationally (cable and network television). For the local markets, Nielsen Monitor-Plus uses passive

pattern recognition to capture and identify all commercial activity. For the larger 108 Full Discovery Markets (FDM) all activity is captured and identified; for the smaller 102 Automated Discovery Markets (ADM), commercials are captured and identified only after they have first appeared nationally or in the FDMs.

Nielsen Media Research, also a division of VNU, measures television audiences for national networks and in 210 local or “spot” markets (Designated Market Areas or DMAs). Nielsen measures national audiences using a sample of approximately 9,000 households containing more than 18,000 people who have agreed to participate. Local audiences are measured using different methodologies; local market samples depend on market size and range from 400 to 800 households. In 10 markets, Nielsen uses people meters (set-top devices that allow viewers to register their presence by clicking a button) to measure audience size and composition; in 46 markets, Nielsen uses a combination of set meters (set-top boxes that record television tuning) to determine household ratings and written diaries to determine audience composition; in 154 markets, Nielsen deploys only written diaries to determine both

audience size and composition. Local market diaries in these markets are only used during the “sweeps” months, typically in February, May, July and November.

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Thomas Babor, Ph.D., M.P.H., Professor and Chairman, Department of Community Medicine and Health Care, University of Connecticut School of Medicine.

# I. Alcohol Product Advertising on Television, 2001-2007: An Overview

Although alcohol-industry advertising spending increased very little on television between 2001 and 2007 (only 1.3% when adjusted for inflation), the number of alcohol product advertisements grew by 50.8%, from 225,619 in 2001 to 340,337 in 2007. The main reason for this increase was the tripling of alcohol advertising placements on cable television, from 51,019 in 2001 to 168,318 in 2007.

**Table 1: Alcohol Advertisements and Spending on Television, 2001-2007**

Year	Broadcast Network TV		Cable Network TV		Broadcast Spot TV		Total TV	
	Ads	Dollars	Ads	Dollars	Ads	Dollars	Ads	Dollars
2001	5,018	\$483,226,280	51,019	\$156,796,827	169,582	\$139,089,147	225,619	\$779,112,254
2002	6,231	\$600,572,725	80,633	\$214,888,169	212,492	\$181,724,716	299,356	\$997,185,610
2003	4,950	\$486,485,051	81,101	\$232,709,300	200,884	\$171,642,476	286,935	\$890,836,827
2004	6,174	\$528,075,400	115,384	\$330,460,655	164,291	\$128,694,559	285,849	\$987,230,614
2005	5,641	\$471,653,390	142,912	\$437,296,859	147,807	\$120,990,553	296,360	\$1,029,940,802
2006	4,328	\$452,391,732	140,977	\$367,732,112	154,170	\$172,051,966	299,475	\$992,175,810
2007	3,992	\$413,906,261	168,318	\$391,663,032	168,027	\$118,070,452	340,337	\$923,639,745
<b>Total</b>	<b>36,334</b>	<b>\$3,436,310,839</b>	<b>780,344</b>	<b>\$2,131,546,954</b>	<b>1,217,253</b>	<b>\$1,032,263,869</b>	<b>2,033,931</b>	<b>\$6,600,121,662</b>

Source: Nielsen Media Research, 2001-2007.

Distilled spirits advertising experienced the most dramatic increase on cable, but beer advertisers kept pace. Cable advertising placements for distilled spirits grew from 1,973 in 2001 to 62,776 in 2007, while the number of beer advertisements on cable rose from 36,834 to 90,630 over the same period. Advertising for alcopops on cable peaked in 2002, then stayed at roughly the same level from 2003 to 2006, and finally dropped again in 2007. Wine advertising on cable also reached its apex in 2002 and then fell back to earlier levels.

**Table 2: Alcohol Advertisements and Spending on Cable Networks, 2001-2007**

Year	Beer and Ale		Distilled Spirits		Alcopops		Wine		Total	
	Ads	Dollars	Ads	Dollars	Ads	Dollars	Ads	Dollars	Ads	Dollars
2001	36,834	\$122,064,382	1,973	\$5,186,178	3,046	\$11,517,209	9,166	\$18,029,058	51,019	\$156,796,827
2002	42,182	\$118,490,242	5,054	\$13,851,156	13,738	\$39,393,783	19,659	\$43,152,988	80,633	\$214,888,169
2003	46,128	\$158,000,246	19,396	\$33,853,439	6,381	\$19,918,026	9,196	\$20,937,589	81,101	\$232,709,300
2004	67,384	\$232,665,261	33,738	\$66,829,863	6,043	\$16,975,936	8,219	\$13,989,595	115,384	\$330,460,655
2005	81,461	\$277,423,543	44,752	\$119,138,598	6,928	\$22,402,147	9,771	\$18,332,571	142,912	\$437,296,859
2006	65,784	\$190,273,262	59,526	\$139,745,230	6,506	\$21,955,537	9,161	\$15,758,083	140,977	\$367,732,112
2007	90,630	\$238,887,302	62,776	\$128,351,728	4,335	\$6,860,896	10,577	\$17,563,106	168,318	\$391,663,032
<b>Total</b>	<b>430,403</b>	<b>\$1,337,804,238</b>	<b>227,215</b>	<b>\$506,956,192</b>	<b>46,977</b>	<b>\$139,023,534</b>	<b>75,749</b>	<b>\$147,762,990</b>	<b>780,344</b>	<b>\$2,131,546,954</b>

Source: Nielsen Media Research, 2001-2007.

Although overall inflation-adjusted spending on alcohol advertising has not risen, the increased number of alcohol advertisements has led to much greater exposure to alcohol advertising for all groups, including youth. This exposure has not reached more youths, but rather has ensured that those youths who saw alcohol advertising saw much more of it in 2007 than in 2001.

**Table 3: Reach, Frequency and GRPs for Alcohol Advertising on Television, 2001–2007**

2001												
Type	Youth Ages 12–20			Young Adults Ages 21–34			Adults Ages 21–49			Adults Age 21+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	89%	181.5	16,215	94%	269.4	25,294	95%	257.5	24,527	96%	254.8	24,355
Distilled Spirits	58%	5.6	324	71%	6.7	473	72%	6.2	448	74%	5.8	429
Alcopops	85%	18.9	1,606	90%	25.9	2,332	92%	25.8	2,375	93%	25.2	2,329
Wine	85%	15.9	1,357	91%	28.5	2,586	93%	32.5	3,022	94%	40.3	3,807
<b>Total</b>	<b>90%</b>	<b>216.5</b>	<b>19,502</b>	<b>94%</b>	<b>325.6</b>	<b>30,685</b>	<b>96%</b>	<b>317.8</b>	<b>30,372</b>	<b>96%</b>	<b>321.7</b>	<b>30,920</b>
2002												
Type	Youth Ages 12–20			Young Adults Ages 21–34			Adults Ages 21–49			Adults Age 21+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	90%	198.4	17,820	94%	292.9	27,542	95%	281	26,798	96%	277.3	26,517
Distilled Spirits	67%	11.0	742	77%	14.0	1,077	80%	13.8	1,106	81%	13.3	1,082
Alcopops	88%	59.4	5,232	92%	85.4	7,899	94%	81.3	7,661	95%	76.9	7,282
Wine	84%	20.0	1,688	88%	35.2	3,111	91%	40.7	3,723	93%	51.9	4,826
<b>Total</b>	<b>90%</b>	<b>282.6</b>	<b>25,482</b>	<b>94%</b>	<b>419.6</b>	<b>39,629</b>	<b>96%</b>	<b>410.3</b>	<b>39,289</b>	<b>96%</b>	<b>412.5</b>	<b>39,706</b>
2003												
Type	Youth Ages 12–20			Young Adults Ages 21–34			Adults Ages 21–49			Adults Age 21+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	90%	201.7	18,112	94%	299.9	28,211	96%	292.9	27,983	96%	287.0	27,504
Distilled Spirits	70%	34.3	2,398	77%	45.8	3,527	80%	43.8	3,492	81%	40.1	3,257
Alcopops	84%	25.6	2,146	89%	34.0	3,042	92%	31.6	2,900	92%	28.8	2,666
Wine	74%	9.8	726	83%	16.2	1,343	87%	18.8	1,627	90%	23.2	2,085
<b>Total</b>	<b>90%</b>	<b>260.8</b>	<b>23,381</b>	<b>94%</b>	<b>383.3</b>	<b>36,122</b>	<b>96%</b>	<b>376.1</b>	<b>36,003</b>	<b>96%</b>	<b>396.7</b>	<b>35,512</b>
2004												
Type	Youth Ages 12–20			Young Adults Ages 21–34			Adults Ages 21–49			Adults Age 21+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	90%	231.0	20,746	94%	355.6	33,429	95%	354.2	33,772	96%	351.0	33,601
Distilled Spirits	73%	67.2	4,884	79%	81.6	6,471	82%	76.9	6,320	84%	70.0	5,844
Alcopops	80%	16.6	1,332	86%	23.8	2,036	89%	22.4	1,984	89%	21.2	1,900
Wine	78%	10.8	840	84%	16.1	1,353	87%	17.6	1,542	89%	21.1	1,883
<b>Total</b>	<b>90%</b>	<b>309.0</b>	<b>27,803</b>	<b>94%</b>	<b>459.4</b>	<b>43,290</b>	<b>95%</b>	<b>457.0</b>	<b>43,617</b>	<b>96%</b>	<b>450.7</b>	<b>43,228</b>
2005												
Type	Youth Ages 12–20			Young Adults Ages 21–34			Adults Ages 21–49			Adults Age 21+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	89%	193.4	17,293	93%	307.8	28,773	95%	320.1	30,432	96%	330.0	31,559
Distilled Spirits	73%	104.1	7,641	79%	126.0	9,968	82%	122.2	10,017	84%	112.6	9,402
Alcopops	81%	19.1	1,543	86%	25.0	2,155	89%	24.2	2,150	90%	22.7	2,036
Wine	78%	12.2	947	84%	19.2	1,613	88%	22.6	1,975	89%	27.8	2,483
<b>Total</b>	<b>89%</b>	<b>306.2</b>	<b>27,424</b>	<b>94%</b>	<b>452.2</b>	<b>42,510</b>	<b>95%</b>	<b>466.9</b>	<b>44,574</b>	<b>96%</b>	<b>474.2</b>	<b>45,479</b>
2006												
Type	Youth Ages 12–20			Young Adults Ages 21–34			Adults Ages 21–49			Adults Age 21+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	89%	154.3	13,731	93%	239.8	22,297	95%	247.8	23,544	95%	258.3	24,669
Distilled Spirits	77%	120.2	9,259	82%	154.3	12,651	85%	147.6	12,542	84%	141.4	11,929
Alcopops	75%	20.1	1,505	80%	24.8	1,981	84%	22.8	1,913	85%	20.8	1,772
Wine	78%	11.0	858	84%	17.5	1,474	88%	19.9	1,753	90%	24.5	2,205
<b>Total</b>	<b>89%</b>	<b>284.9</b>	<b>25,353</b>	<b>93%</b>	<b>412.9</b>	<b>38,403</b>	<b>94%</b>	<b>422.9</b>	<b>39,752</b>	<b>96%</b>	<b>424.0</b>	<b>40,575</b>
2007												
Type	Youth Ages 12–20			Young Adults Ages 21–34			Adults Ages 21–49			Adults Age 21+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	89%	186.2	16,576	93%	271.4	25,269	95%	276.5	26,192	95%	282.7	26,940
Distilled Spirits	72%	117.2	8,392	79%	142.7	11,241	81%	140.0	11,332	82%	134.1	11,053
Alcopops	75%	12.0	902	81%	15.1	1,217	84%	13.7	1,152	85%	12.6	1,064
Wine	80%	12.7	1,008	86%	20.6	1,770	89%	23.1	2,063	91%	29.0	2,641
<b>Total</b>	<b>89%</b>	<b>301.0</b>	<b>26,877</b>	<b>94%</b>	<b>421.8</b>	<b>39,497</b>	<b>95%</b>	<b>428.1</b>	<b>40,740</b>	<b>96%</b>	<b>436.1</b>	<b>41,698</b>

Source: Nielsen Media Research, 2001–2007. GRPs may not add up due to rounding.

## II. The Alcohol Industry's 30% Threshold

In 2003, the Beer Institute and the Distilled Spirits Council of the United States (DISCUS), trade associations for their respective industries, adopted a "proportional" 30% maximum for underage audiences of programming where their members place their advertising. (The Wine Institute had adopted the 30% threshold in 2000.) Approximately 27.1% of the population age two and above (the population measured for television viewership by Nielsen Media Research) is under 21. Within this population, 68% of the exposure to alcohol advertising went to 12-to-20-year-olds in 2007. This segment is approximately 15% of the population age two and above.

Alcohol companies have made progress toward meeting the 30% threshold. The percentage of advertising placements above this threshold has fallen from 11% in 2001 to 6.3% in 2007. No ads were placed on broadcast network programming with greater-than-30%-underage audiences in 2007: the 21,555 advertisements on programming above the threshold were entirely on cable networks or local (spot) broadcasting.

**Table 4: Alcohol Advertisements Exceeding 30% Threshold, 2001–2007**

	2001	2002	2003	2004	2005	2006	2007
<b>Total Ads</b>	225,619	299,356	286,935	285,849	296,360	299,475	340,337
Ads > 30%	24,825	36,246	35,819	32,082	23,238	18,220	21,555
% of Ads	11.0%	12.1%	12.5%	11.2%	7.8%	6.1%	6.3%
<b>Broadcast Network</b>	5,018	6,231	4,950	6,174	5,641	4,328	3,992
Ads > 30%	171	159	96	27	0	4	0
% of Ads	3.4%	2.6%	1.9%	0.4%	0.0%	0.1%	0.0%
<b>Cable Network</b>	51,019	80,633	81,101	115,384	142,912	140,977	168,318
Ads > 30%	5,920	9,847	9,948	13,795	9,061	4,876	7,540
% of Ads	11.6%	12.2%	12.3%	12.0%	6.3%	3.5%	4.5%
<b>Broadcast Spot</b>	169,582	212,492	200,884	164,291	147,807	154,170	168,027
Ads > 30%	18,734	26,240	25,775	18,260	14,177	13,340	14,015
% of Ads	11.0%	12.3%	12.8%	11.1%	9.6%	8.7%	8.3%

Source: Nielsen Media Research, 2001–2007.

Advertisements on programming with underage audiences greater than 30% were responsible for 9% of all youth exposure to alcohol advertising on television in 2007. Of the 137 alcohol brands advertising on television in 2007, 20 brands placed 69% of the alcohol product advertisements on television but accounted for 80% of advertisements placed above the threshold. These brands generated 59% of the youth exposure to the alcohol advertising that was placed on programming with underage audiences of greater than 30%.

**Table 5: Alcohol Brands With the Most Advertising on Television Programming With Above 30% Underage Audience Composition, 2007**

Alcohol Advertising on Programs with Youth-Ages-2-20 Audience Composition Over 30%

Brand	Parent Company	Ads	Dollars	Youth Ages 12-20 Impressions	% of Brand Ads	% of Brand Ages 12-20 Impressions	Cumulative Youth Impressions	Cumulative % of Youth Impressions (>30%)	Cumulative Ads	Cumulative % of Ads (>30%)
Corona Extra Beer	Grupo Modelo SAB de CV	2,650	\$1,371,616	48,970,478	10.2%	12.2%	48,970,478	5.6%	2,650	12.3%
Miller Lite	SAB Miller PLC	1,982	\$2,063,486	54,495,119	6.7%	6.3%	103,465,597	11.8%	4,632	21.5%
Bud Light	Anheuser-Busch Cos Inc	1,560	\$2,045,720	41,336,015	7.2%	5.6%	144,801,613	16.5%	6,192	28.7%
Miller Chill	SAB Miller PLC	1,346	\$659,795	45,641,245	5.9%	10.6%	190,442,857	21.7%	7,538	35.0%
Guinness Beers	Diageo PLC	1,054	\$770,826	35,926,393	8.4%	13.5%	226,369,251	25.8%	8,592	39.9%
Coors Light	Molson Coors Brewing Co	903	\$2,684,859	52,139,877	6.8%	6.7%	278,509,128	31.7%	9,495	44.1%
Miller High Life	SAB Miller PLC	841	\$322,292	7,825,266	7.9%	8.1%	286,334,394	32.6%	10,336	48.0%
Heineken Premium Lite Lager	Heineken NV	807	\$651,428	23,363,792	8.6%	9.4%	309,698,186	35.2%	11,143	51.7%
Modelo Especial Beer	Grupo Modelo SAB de CV	732	\$480,925	5,742,737	21.1%	37.8%	315,440,923	35.9%	11,875	55.1%
Heineken Beer	Heineken NV	688	\$529,688	17,653,005	5.9%	5.7%	333,093,928	37.9%	12,563	58.3%
Labatt Blue Light Beer	InBev SA	667	\$95,533	1,777,012	5.7%	11.9%	334,870,940	38.1%	13,230	61.4%
Keystone Light Beer	Molson Coors Brewing Co	601	\$85,593	2,741,257	6.1%	7.4%	337,612,197	38.4%	13,831	64.2%
Miller Genuine Draft	SAB Miller PLC	567	\$429,561	6,937,686	9.7%	19.7%	344,549,883	39.2%	14,398	66.8%
Dos Equis Beer	InBev SA	542	\$500,190	7,480,476	10.2%	26.0%	352,030,359	40.1%	14,940	69.3%
Budweiser Beer	Anheuser-Busch Cos Inc	518	\$561,378	5,943,688	5.5%	2.4%	357,974,047	40.7%	15,458	71.7%
Budweiser Select Beer	Anheuser-Busch Cos Inc	439	\$294,873	4,761,944	6.6%	3.1%	362,735,991	41.3%	15,897	73.8%
Disaronno Originale Amaretto	Bacardi Ltd	403	\$589,186	39,196,942	5.5%	12.9%	401,932,933	45.7%	16,300	75.6%
Multiple Brands from Mike's Beverages	Mark Anthony Group Inc	358	\$307,877	24,192,130	6.5%	20.5%	426,125,063	48.5%	16,658	77.3%
Hennessy Cognacs	LVMH Moet Hennessy Louis Vuitton SA	346	\$752,004	42,611,991	7.4%	18.1%	468,737,053	53.3%	17,004	78.9%
Samuel Adams Beers	Boston Beer Co Inc	299	\$930,571	45,735,568	4.2%	10.5%	514,472,621	58.6%	17,303	80.3%
<b>Subtotal of These Brands</b>		<b>17,303</b>	<b>\$16,127,401</b>	<b>514,472,621</b>	<b>7.4%</b>	<b>8.9%</b>				
<b>Total of All Brands</b>		<b>21,555</b>	<b>\$24,545,166</b>	<b>878,646,225</b>	<b>6.3%</b>	<b>8.8%</b>				

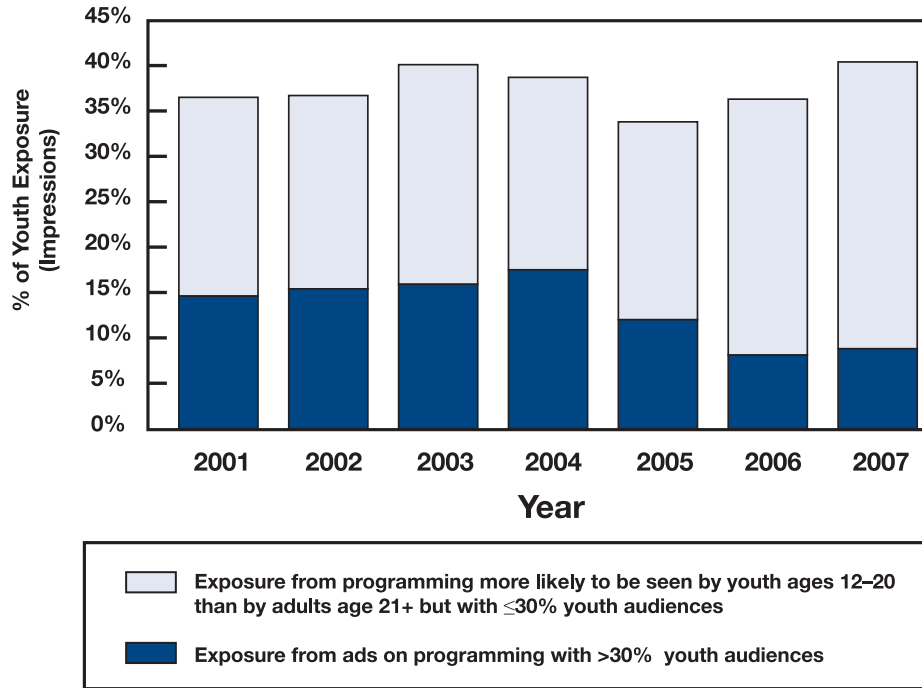
Source: Nielsen Media Research, 2007.

### III. Youth Overexposure to Alcohol Product Advertising on Television

Youth are overexposed to alcohol advertisements on television when those advertisements are placed on programming with youth audiences that are out of proportion to the presence of youth in the general population. For national television in 2007, youth were overexposed to advertisements when youth were more than 15.2% of the audience age 12 and above, i.e., when the GRPs for youth ages 12 to 20 exceeded the GRPs for adults age 21 and older.<sup>12</sup>

The 30% threshold has not been effective in reducing youth exposure to alcohol advertising on television, since that exposure has increased dramatically over the years CAMY has monitored it. The 30% standard has also failed to reduce youth overexposure. Figure 1 shows the percentage of youth exposure coming from advertising placed on programming with audiences greater than 30% and on programming with audiences that are disproportionately youthful but that fell below the 30% threshold. While placements and the percentage of youth exposure above 30% have declined, placements in programming with disproportionately youthful audiences below 30% have increased, and the percentage of youth exposure to alcohol advertising generated by these placements has not declined. As of 2007, the percentage of youth exposure coming from placements with disproportionately youthful audiences was slightly higher than what it was prior to the adoption of the 30% standard in late 2003.

**Figure 1: Percentage of Youth Exposure From Alcohol Product Advertising Placed Above the 30% Threshold and on Programming with Disproportionate Youth Audiences, 2001–2007**



Source: Nielsen Media Research, 2001–2007.

These “overexposing” advertisements accounted for 40.4% of youth exposure to alcohol product advertising on television in 2007, the highest percentage since CAMY began monitoring youth exposure in 2001. In advertisements and in dollars, this represents a more than 20% increase over 2001 levels, while total youth exposure from this segment of advertising placements increased by 52.3%.

**Table 6: Overexposing Advertisements, Dollars and Gross Rating Points Associated With Youth Ages 12 to 20, 2001–2007**

Year	Overexposing Ads			Overexposing Dollars			Overexposing Youth Ages 12–20 GRPs		
	Ads	% of Total Ads	% Change vs Prior Year	Dollars	% of Total Dollars	% Change vs Prior Year	GRPs	% of Total Youth Ages 12–20 GRPs	% Change vs Prior Year
2001	55,721	24.7%	-	\$111,923,731	14.4%	-	7,133	36.6%	-
2002	77,388	25.9%	38.9%	\$121,563,351	12.2%	8.6%	9,403	36.9%	31.8%
2003	74,406	25.9%	-3.9%	\$125,643,295	14.1%	3.4%	9,381	40.1%	-0.2%
2004	67,111	23.5%	-9.8%	\$120,525,651	12.2%	-4.1%	10,754	38.7%	14.6%
2005	58,662	19.8%	-12.6%	\$111,883,193	10.9%	-7.2%	9,260	33.8%	-13.9%
2006	58,753	19.6%	0.2%	\$115,284,699	11.6%	3.0%	9,220	36.4%	-0.4%
2007	68,700	20.2%	16.9%	\$136,953,390	14.8%	18.8%	10,865	40.4%	17.8%
<b>Change: 2001–2007</b>			<b>23.3%</b>			<b>22.4%</b>			<b>52.3%</b>

Source: Nielsen Media Research, 2001–2007.



In 2007, youth overexposure was fairly evenly distributed among brands. The largest brands were responsible for youth overexposure roughly in proportion to the amount of alcohol advertising they placed on television. Of the 137 alcohol brands advertising on television in 2007, 27 placed 78% of all alcohol product ads and 80.6% of all overexposing product ads. Approximately 40% of these brands' youth exposure came from overexposing advertisements, the same percentage as for all brands taken together.

**Table 7: Alcohol Brands With the Most Advertising on Television Programming That Overexposed Youth Relative to Adults, 2007**

Alcohol Advertising on Programs That Overexposed Youth Relative to Adults									
Brand	Ads	Dollars	Youth Ages 12-20 Impressions	% Brand Ads	% of Brand Youth Ages 12-20 Impressions	Cumulative Youth Ages 12-20 Impressions	Cumulative % of Youth Ages 12-20 Impressions	Cumulative Ads	Cumulative % of Ads
Miller Lite	6,321	\$11,182,833	297,827,791	21.5%	34.6%	297,827,791	3.0%	6,321	9.2%
Corona Extra Beer	5,815	\$6,334,594	172,240,973	22.5%	42.8%	470,068,764	4.7%	12,136	17.7%
Bud Light	3,939	\$10,492,028	193,846,923	18.1%	26.5%	663,915,686	6.6%	16,075	23.4%
Coors Light	3,711	\$13,466,460	258,553,043	27.9%	33.1%	922,468,730	9.2%	19,786	28.8%
Guinness Beers	3,644	\$4,442,872	153,460,767	29.2%	57.5%	1,075,929,496	10.8%	23,430	34.1%
Miller Chill	3,642	\$2,783,821	163,886,598	15.9%	38.1%	1,239,816,095	12.4%	27,072	39.4%
Heineken Premium Lite Lager	2,158	\$3,849,527	97,453,948	23.0%	39.0%	1,337,270,042	13.4%	29,230	42.5%
Heineken Beer	2,132	\$4,536,986	108,921,880	18.4%	34.9%	1,446,191,922	14.5%	31,362	45.7%
Miller High Life	1,815	\$933,186	18,764,760	17.1%	19.4%	1,464,956,682	14.6%	33,177	48.3%
Samuel Adams Beers	1,804	\$6,262,643	208,516,903	25.1%	48.0%	1,673,473,586	16.7%	34,981	50.9%
Disaronno Originale Amaretto	1,747	\$3,014,266	153,601,223	23.8%	50.6%	1,827,074,808	18.3%	36,728	53.5%
Keystone Light Beer	1,398	\$513,899	11,636,342	14.1%	31.4%	1,838,711,151	18.4%	38,126	55.5%
Labatt Blue Light Beer	1,395	\$275,874	4,243,283	12.0%	28.3%	1,842,954,434	18.4%	39,521	57.5%
Hennessy Cognacs	1,375	\$3,137,915	146,318,262	29.2%	62.1%	1,989,272,696	19.9%	40,896	59.5%
Samuel Adams Boston Lager	1,301	\$4,787,426	140,281,087	26.7%	49.1%	2,129,553,783	21.3%	42,197	61.4%
Dos Equis Beer	1,300	\$1,232,244	15,279,453	24.4%	53.2%	2,144,833,236	21.4%	43,497	63.3%
Budweiser Beer	1,275	\$2,030,362	27,537,399	13.4%	11.3%	2,172,370,634	21.7%	44,772	65.2%
Smirnoff Vodkas	1,258	\$3,186,947	139,490,497	29.1%	57.0%	2,311,861,131	23.1%	46,030	67.0%
Smirnoff Ice Malt Beverage	1,221	\$2,220,409	117,184,696	38.3%	56.5%	2,429,045,827	24.3%	47,251	68.8%
Multiple Brands from Mike's Beverages	1,215	\$1,373,167	72,327,336	22.0%	61.2%	2,501,373,163	25.0%	48,466	70.5%
Baileys Irish Cream Liqueur	1,209	\$2,360,453	90,854,479	24.0%	49.1%	2,592,227,642	25.9%	49,675	72.3%
Tanqueray Rangpur Gin	1,204	\$3,298,754	89,780,251	23.5%	47.8%	2,682,007,893	26.8%	50,879	74.1%
Miller Genuine Draft	947	\$746,330	11,840,974	16.2%	33.7%	2,693,848,867	26.9%	51,826	75.4%
Crown Royal Whiskey	916	\$2,236,667	73,644,409	20.4%	50.2%	2,767,493,277	27.7%	52,742	76.8%
Modelo Especial Beer	902	\$580,211	7,841,053	26.0%	51.6%	2,775,334,330	27.7%	53,644	78.1%
Bacardi Rums	866	\$3,862,482	99,042,806	26.2%	44.2%	2,874,377,136	28.7%	54,510	79.3%
Budweiser Select Beer	858	\$1,327,738	26,038,190	12.9%	17.0%	2,900,415,326	29.0%	55,368	80.6%
<b>Subtotal of These Brands</b>	<b>55,368</b>	<b>\$100,470,094</b>	<b>2,900,415,326</b>	<b>20.9%</b>	<b>40.1%</b>				
<b>Total of All Brands</b>	<b>68,700</b>	<b>\$136,953,390</b>	<b>4,045,448,428</b>	<b>20.2%</b>	<b>40.4%</b>				

Source: Nielsen Media Research, 2007.

## IV. Ranking Brand Performance

If youth overexposure is relatively evenly distributed across brands, the question arises of how to identify brands for which the performance in avoiding youth exposure could most benefit from improvement. CAMY has developed a methodology for identifying which brands did best overall both in complying with the industry's 30% threshold and in avoiding youth overexposure to alcohol advertising (see Appendix A, Section 2E for details). Because youth overexposure correlates closely with brand spending (i.e., the highest-spending brands tended to account for the largest amounts of youth overexposure), scores were created that give equal weight to overexposure and to compliance with the 30% threshold. To avoid disproportionate influence by low-spending brands for which relatively few placements could skew the scoring, the analysis focused on brands generating at least 100 gross rating points among youth ages 12 to 20 in 2007. Within the 30% threshold score, in order to focus on brands for which placements above 30% both were substantial and generated significant youth exposure, two measures were given equal weight: the percentage of advertising placements above 30%, and the percentage of the brand's youth exposure coming from these placements.

In an analysis using 2007 data, 11 brands stood out as the worst performers when these three variables were combined, and seven brands emerged as the best performers.

**Table 8: Worst- and Best-Performing Brands, 2007**

	Total		Placements > 30%		Percentage > 30%		Overexposing		Score
	Youth Ages 12-20 GRPs	Ads	Youth Ages 12-20 GRPs	Ads	Youth Ages 12-20 GRPs	Ads	Youth Ages 12-20 GRPs	% of All Overexposing Youth Ages GRPs	
<b>Worst-Performing Brands</b>									
Miller Lite	2,313	29,372	146	1,982	6.3%	6.7%	800	7.4%	73.5
Corona Extra Beer	1,081	25,878	131	2,650	12.2%	10.2%	463	4.3%	67.8
Coors Light	2,096	13,308	140	903	6.7%	6.8%	694	6.4%	67.2
Hennessy Cognacs	632	4,707	114	346	18.1%	7.4%	393	3.6%	63.6
Guinness Beers	717	12,500	96	1,054	13.5%	8.4%	412	3.8%	61.7
Samuel Adams Beers	1,168	7,189	123	299	10.5%	4.2%	560	5.2%	56.9
Bud Light	1,966	21,763	111	1,560	5.6%	7.2%	521	4.8%	55.7
Smirnoff Vodkas	657	4,323	93	267	14.2%	6.2%	375	3.4%	54.6
Disaronno Originale Amaretto	816	7,340	105	403	12.9%	5.5%	413	3.8%	53.7
Miller Chill	1,154	22,877	123	1,346	10.6%	5.9%	440	4.1%	53.6
Multiple Brands from Mike's Beverages	317	5,512	65	358	20.5%	6.5%	194	1.8%	51.6
<b>Best-Performing Brands</b>									
Michelob Beer	130	965	6	34	4.3%	3.5%	32	0.3%	13.5
Santa Margherita Pinot Grigio	181	2,066	7	30	3.7%	1.5%	67	0.6%	9.8
Korbel California Champagnes	212	2,325	6	43	2.8%	1.8%	47	0.4%	8.4
Arbor Mist Wines	319	3,236	2	32	0.7%	1.0%	34	0.3%	2.7
Rolling Rock Beer	103	380	1	2	0.6%	0.5%	53	0.5%	2.7
Michelob Ultra Light Beer	188	1,738	1	14	0.7%	0.8%	26	0.2%	1.8
Kahlua Hazelnut	151	874	2	2	1.3%	0.2%	23	0.2%	0.9

Source: Nielsen Media Research, 2007

## V. Alcohol Industry "Responsibility" Advertising on Television, 2001 to 2007

In addition to placing product advertising on television, some alcohol companies also place "responsibility" advertisements, which seek to deliver messages about underage drinking or about drinking safely (i.e., in moderation or not in combination with driving, etc.). From 2001 to 2007, alcohol companies spent 43 times as much money to place 28 times as many product advertisements as "responsibility" messages. The vast majority of these messages focused on drinking-driving, drinking in moderation or other safety messages.

**Table 9: Proportion of Alcohol Advertisements and Expenditures by Advertisement Type, 2001–2007**

Message Type	2001–2007		2001		2002		2003	
	Ads	Dollars	Ads	Dollars	Ads	Dollars	Ads	Dollars
Product	2,033,931	\$6,600,121,662	225,619	\$779,112,254	299,356	\$997,185,610	286,935	\$890,836,827
Underage Drinking	11,063	\$21,705,500	9,493	\$14,726,901	769	\$5,610,966	350	\$856,501
Drinking-Driving/Safety	62,502	\$133,285,165	5,659	\$14,949,092	1,611	\$6,365,338	2,913	\$16,245,863
All "Responsibility"	73,565	\$154,990,665	15,152	\$29,675,993	2,380	\$11,976,304	3,263	\$17,102,364
<b>Proportion of Product to "Responsibility"</b>								
Product:Underage Drinking	184	304	24	53	389	178	820	1040
Product:Drinking-Driving/Safety	33	50	40	52	186	157	99	55
Product:All "Responsibility"	28	43	15	26	126	83	88	52
Message Type	2004		2005		2006		2007	
	Ads	Dollars	Ads	Dollars	Ads	Dollars	Ads	Dollars
Product	285,849	\$987,230,614	296,360	\$1,029,940,802	299,475	\$992,175,810	340,337	\$923,639,745
Underage Drinking	122	\$153,746	329	\$357,386	0	\$0	0	\$0
Drinking-Driving/Safety	7,800	\$17,491,236	11,781	\$27,118,003	16,038	\$24,886,721	16,700	\$26,228,912
All "Responsibility"	7,922	\$17,644,982	12,110	\$27,475,389	16,038	\$24,886,721	16,700	\$26,228,912
<b>Proportion of Product to "Responsibility"</b>								
Product:Underage Drinking	2343	6421	901	2,882	N/A	N/A	N/A	N/A
Product:Drinking-Driving/Safety	37	56	25	38	19	40	20	35
Product:All "Responsibility"	36	56	24	37	19	40	20	35

Source: Nielsen Media Research, 2001–2007.

Placement of this kind of advertising varies by company. Diageo spent nearly 19% of its television advertising dollars on “responsibility” messages from 2001 to 2007, while Anheuser-Busch Companies, the largest alcohol advertiser on television, spent 1% of its budget on these messages (and in total dollars, less than a quarter of what Diageo spent).

**Table 10: Alcohol Industry Product and "Responsibility" Advertising on Television by Parent Company, 2001–2007**

Parent Company	2001–2007							
	Dollars Spent on Product Advertising	% of Company Total	Dollars Spent on "Responsibility" Advertising	% of Company Total	Dollars Spent on Other Advertising	% of Company Total	Total Advertising Dollars	
Diageo PLC	\$454,643,040	80.0%	\$106,451,184	18.7%	\$7,149,449	1.3%	\$568,243,673	
Anheuser-Busch, Inc	\$2,223,252,860	96.3%	\$23,463,632	1.0%	\$61,442,685	2.7%	\$2,308,159,177	
Molson Coors Brewing Co	\$648,700,380	98.3%	\$10,766,745	1.6%	\$689,168	0.1%	\$660,156,293	
Bacardi LTD	\$122,446,674	93.4%	\$8,399,570	6.4%	\$313,071	0.2%	\$131,159,315	
Brown-Forman Corp.	\$60,401,870	96.5%	\$2,204,612	3.5%	\$0	0.0%	\$62,606,482	
Inbev SA	\$31,392,591	94.3%	\$1,888,620	5.7%	\$0	0.0%	\$33,281,211	
SABMiller PLC	\$853,654,447	98.5%	\$982,786	0.1%	\$12,237,569	1.4%	\$866,874,802	
V&S Vin & Sprit AB	\$5,124,106	89.7%	\$588,769	10.3%	\$0	0.0%	\$5,712,875	
Fortune Brands Inc	\$1,427,839	86.5%	\$222,492	13.5%	\$0	0.0%	\$1,650,331	
Puerto Rico Industrial Development Company	\$44,320	66.7%	\$22,160	33.3%	\$0	0.0%	\$66,480	
Constellation Brands Inc	\$7,334,722	100.0%	\$95	0.0%	\$0	0.0%	\$7,334,817	
Other Companies (118)	\$2,191,698,813	98.3%	\$0	0.0%	\$37,025,279	1.7%	\$2,228,724,092	
<b>Industry Total</b>	<b>\$6,600,121,662</b>	<b>96.0%</b>	<b>\$154,990,665</b>	<b>2.3%</b>	<b>\$118,857,221</b>	<b>1.7%</b>	<b>\$6,873,969,548</b>	

\* “Other” advertising includes corporate and event advertising.  
Source: Nielsen Media Research, 2001–2007.

Youth and adult exposure to the alcohol industry's "responsibility" messages has consistently been overwhelmed by the amount of alcohol product advertising seen by each group each year. From 2001 to 2007, youth ages 12 to 20 were 22 times more likely to see a product advertisement for alcohol than an alcohol-industry-funded "responsibility" message." Adults were 26 times more likely to see an alcohol product advertisement than an industry-funded "responsibility" advertisement.

**Table 11: Youth vs. Adult Exposure to "Responsibility" Advertising by Message Type, 2001–2007**

2001–2007 GRPs				
Message Type	Youth Ages 12–20	Young Adults Ages 21–34	Adults Age 21+	Adults Age 35+
Product	175,822	270,137	277,118	279,606
Underage Drinking	519	768	784	790
Drinking-Driving/Safety	7,556	10,228	9,879	9,754
All "Responsibility"	8,075	10,996	10,663	10,544
<b>Proportion of Product to "Responsibility:"</b>				
Product:Underage Drinking	339	352	353	354
Product:Drinking-Driving/Safety	23	26	28	29
Product:All "Responsibility"	22	25	26	27

Source: Nielsen Media Research, 2001–2007. GRPs may not add up due to rounding.

## VI. Conclusion

This is the 10th report on alcohol advertising on television published by CAMY since 2001. This time period has seen a significant increase in youth exposure to alcohol advertising on television, especially on cable networks where audiences tend to be more tightly segmented than on broadcast channels.<sup>13</sup>

Analyses of the advertising schedules of individual brands show that some brands are able to achieve high levels of compliance with the industry's voluntary standard of a 30% maximum for youth in audiences of programming where alcohol advertisements are placed, as well as relatively low levels of youth overexposure. At the same time, the 11 brands identified in this report as in need of improvement accounted for 48.5% of youth overexposure to alcohol advertising on television. Corona Extra placed 2,650 advertisements above the industry's voluntary 30% threshold; Miller Lite placed 1,982 advertisements above the threshold.

Six years of independent monitoring by CAMY have brought the issue of alcohol companies' placement practices to the forefront of debates over alcohol advertising and youth. Over this time period, the alcohol industry has tightened and clarified its self-regulatory standards and review procedures. The National Research Council and Institute of Medicine and the U.S. Surgeon General have both underscored the need for the independent monitoring to continue.

This is the last report to be published by the Center on Alcohol Marketing and Youth at Georgetown University. The Center was originally established for three years and later extended to six years to demonstrate the difference that could be made in reducing youth exposure to alcohol advertising by undergirding the policy conversation with data drawn from industry-standard sources such as Nielsen Media Research. In 2006 Congress passed unanimously—and President George W. Bush signed into law—legislation authorizing the Department of Health and Human Services to monitor and report annually to Congress the "rate of exposure of youth to advertising and other media messages encouraging and discouraging alcohol consumption."<sup>14</sup> To date, however, no funds have been appropriated for this activity, and no such reporting has occurred.

The prevalence and the toll of underage drinking in the United States remain high. Evidence that alcohol advertising plays a role in the problem grows stronger each year. With approximately 5,000 young lives per year at stake, there is an ongoing need not only for independent monitoring, but also for alcohol companies to adopt a more meaningful and effective standard for where they place their advertisements.

On cable television, the industry's 30% standard leaves 82% of advertising time-slots available for alcohol advertising. The standard has not succeeded in limiting or reducing youth exposure to alcohol advertising on television. A leading industry spokesperson has referred to the standard as "proportional" because approximately 30% of the population is under age 21.<sup>15</sup> Of this underage population, children under age two are not counted by Nielsen. However, of two-to-20-year-olds' exposure to alcohol advertising between 2001 and 2007, 68% fell on 12-to-20-year-olds, a group that Nielsen reports only made up 47% of the two-to-20 age group. Federal surveys begin measuring underage drinking at age 12, and the small amount of drinking among 12-year-olds suggests that 12-to-20-year-olds comprise the group at greatest risk of underage drinking.<sup>16</sup> The U.S. Census Bureau estimates that they are 13% of the population age two and above.<sup>17</sup>

Recognizing that 30% is not a proportional standard when viewed in the light of the population at greatest risk, the National Research Council and Institute of Medicine,<sup>18</sup> as well as 20 state attorneys general,<sup>19</sup> have called on the industry to consider changing its standard to eliminate advertising on programming with more than 15% youth (ages 12 to 20) in its audiences. CAMY simulated what would happen had the industry applied this standard in 2004 and found that youth exposure to alcohol advertising on television would decline by 20% and alcohol companies could save 8% of their advertising dollars, with virtually no impact on their ability to reach 21-to-24-year-olds or 21-to-34-year-olds.<sup>20</sup>

Clearly, a 15% standard would save young people's lives and save the alcohol companies money.

# Appendix A: Methodology

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## 1. Sources

The television advertising exposure analysis for this report was conducted using three principal resources:

- Nielsen Monitor-Plus provides date, time, source, program and expenditure data for each commercial occurrence.
- Nielsen Media Research provides demographic audience impressions and ratings that are associated with each ad occurrence. This information is provided (through Nielsen Monitor-Plus) as follows:
  - 1) network programming is measured year-round, and
  - 2) ratings for spot programming are assumed to be equivalent to the average ratings of “sweeps” months—typically in February, May, July and November—and any other measured months in the same quarter. The one exception is that September ratings are taken from the fourth-quarter average rather than the summer months of the third quarter.
- Impact Databank, a market research firm serving the alcoholic beverage industry, provides industry-accepted classifications for all brands of alcoholic beverages.

## 2. Process

### A. Aggregation levels

A database of all television alcohol ad occurrences and relevant information was compiled. All data were aggregated and analyzed at the following levels:

- Media type (network, cable or spot)
- Network (NBC, FOX, ESPN, etc.)
- Program group (sports, sitcoms, etc., as defined by Nielsen Monitor-Plus)
- Daypart (time of day/week, using industry-accepted classifications)
- Impact Databank classification (beer and ale, distilled spirits, alcopops, wine)
- Brand (Coors Light, etc.)
- Parent company (Anheuser-Busch, etc.)
- Ad classification (i.e., product or “responsibility”)

### B. Calculating GRPs and impressions

Youth audience composition was calculated using a base of viewers age two and over as defined by Nielsen, allowing for the annual universe estimate adjustment in September of each year. Composition for all programs was calculated at the commercial occurrence level based on the most appropriate interval reported by Nielsen Monitor-Plus, typically the quarter-hour in which the occurrence was reported. National (broadcast and cable) gross rating points (GRPs) and impressions were combined with no adjustment, while spot TV GRPs were “nationalized” by summing the local market ad impressions and dividing the total by the national base.

#### *Note on estimated audiences for spot advertisements*

Nielsen Media Research does not field research studies in every television market during every month of the year. In markets where Nielsen has not fielded a study during a particular time period, the industry has accepted the practice of using audience estimates that are carried over from a comparable time period. Standard advertising industry practice is to purchase advertisements using such audience estimates. However, this only affects a small amount of alcohol advertising. For instance, in 2005, the alcohol industry purchased \$42.3 million of advertising during time periods for which audience composition was estimated from prior field studies. In this respect, the estimated audience numbers are substantive and meaningful to companies purchasing advertising. The relatively rare cases when audience numbers do not match what the advertiser intended to purchase are most likely to occur when programming is inserted into a timeslot that usually features a very different type of programming. For example, if a sports program is inserted into a weekday afternoon timeslot, then an audience estimate for programming that normally appears on a weekday afternoon may be applied to the sports program. These occurrences are very rare. In a CAMY analysis of 304,773 alcohol ads in 2005, 1,273 spot TV ads for alcohol appeared on sports programming in weekday daytime timeslots with an estimated audience. The impact of such ads on the results presented here is insignificant.

### **C. Counting and qualifying ads**

Product alcohol ads were included in this analysis if it was determined from their description that they were promoting products and were not general corporate advertisements, “responsibility” advertisements or other public service announcements. An alcohol ad was considered to overexpose youth when it was placed on a program where the percentage of underage youth in the audience was greater than the percentage of underage youth in the general population, that is, when the youth rating was higher than the adult 21+ rating for the time period and program in which the advertisement appeared.

### **D. GRP calculations and estimated reach**

GRPs for demographic groups were calculated by daypart, media type and network and program type and were used to estimate reach and frequency using the Nielsen 2001 Persons Cume Study with T\*View from Stone House Systems, a widely used application for estimating audience reach and frequency.

### **E. Best- and worst-performing brands, 2007**

This analysis ranks alcohol brands based on their commercial ad placements on television programs and the resulting underage youth exposure to those ads.

All alcoholic beverage brands advertising on television that generated at least 100 GRPs (gross rating points) of exposure to youth ages 12 to 20 were included in the analysis. Out of 137 brands advertising on television in 2007, a total of 51 brands had at least 100 GRPs for youth ages 12 to 20.

These 51 alcohol brands were assigned a score from 0 to 100 based on three metrics.

1. The first metric measures the percentage of youth exposure that was generated by ads placed on programming that does not comply with the alcohol industry’s audience placement guidelines. Twenty-five points were assigned to this metric, and each brand was given a score based on its percentage of the full range.
2. The second metric measures the percentage of ad placements on programming that does not comply with the placement guidelines. Twenty-five points were assigned to this metric, and each brand was given a score based on its percentage of the full range.
3. The final metric measures the percentage of total youth exposure from ads that overexposed youth that is attributed to the individual brand. Fifty points were assigned to this metric, and each brand was given a score based on its percentage of the full range.

The first two metrics weighted placements on programming that did not comply with industry guidelines. In a few instances, a small number of ads were placed by an alcohol brand on programming with a relatively young audience, and, as a result, these few ads accounted for a high percentage of total youth exposure. By applying two different metrics—one to account for the percentage of youth exposure and a second to account for the percentage of ads—these cases were averaged out.

To develop an objective method of selecting brands that stand out as “best” or “worst” in terms of these metrics, the distribution of all brand scores was plotted and brands at the extreme of the distribution were examined. The average score was 32.57, and the standard deviation of scores was 18.77. Two cutoff values at the upper and lower ends of the distribution were selected by adding/subtracting one standard deviation from the average score. The upper cutoff was therefore 51.34, and the lower cutoff was 13.80. Brands with scores above 51.34 were considered to be the “worst” brands, and brands with scores below 13.80 were considered to be the “best” brands, as compared to all other brands in the distribution.

### **F. “Responsibility” advertising analysis**

VMR viewed every television alcohol advertisement, using audio and video provided by Nielsen Monitor-Plus, and classified each ad as product, “responsibility,” corporate or event promotion. “Responsibility” ads were classified as such if the primary message was to promote responsible drinking, and these were further classified as either “drinking-driving/safety” or “underage drinking” messages. GRPs were aggregated by classification and “responsibility” ad type in order to compare exposure of these ads to product advertising both in total and at the parent company level.

## Appendix B: Glossary of Advertising Terms

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### **Rating**

Audience as a percentage of a universe estimate.

### **Universe Estimate**

Total persons or homes in a given population (e.g., television households in the United States or persons ages 12 to 20 in the United States).

### **Impressions**

An advertising impression occurs when one person sees or hears an advertisement. If this ad is seen by five different people, that counts as five impressions. If a particular advertising medium, such as a magazine or television program, has an audience of 100,000 people, an ad placed in that magazine or during that program generates a number of impressions equal to the audience size—in this case 100,000 impressions.

### **Gross Impressions**

The sum of impressions for a given ad campaign, or for any other combination of ads, is called gross impressions—so-called because they include multiple exposures for some or all of the people who are exposed to the advertising. If five people see the same ad five times, this counts as 25 gross impressions. For a national advertising campaign, it is common for an advertising schedule to generate 500 million or more gross impressions.

### **Gross Rating Points (GRPs)**

GRPs are a standard measure of advertising exposure. GRPs measure advertising exposure for a particular population, relative to the size of that population, and may be calculated by dividing gross impressions within that population by the number of people in the population. GRPs are also the mathematical product of reach and frequency, which are defined below.

### **Reach and Frequency**

Reach enables advertisers to know what percentage of a population is exposed to advertising. Frequency measures how many times each individual is exposed to a series of ads. Reach, frequency and GRPs are standard measures of media planning.

### **Audience Composition**

Research companies collect demographic information about audiences for different media such as magazines, television programs or radio stations. Demographics usually include age, gender and race, among other factors. For the example of a medium with an audience of 100,000 people, research may report that 20,000 are ages two to 20, and 80,000 are age 21+. In that case, the composition of the audience is calculated by looking at the percentage of the audience that meets different demographic criteria. In this example, the audience composition is 20% ages two to 20 and 80% age 21+.



# Endnotes

- <sup>1</sup> For the purposes of this report, “youth” are persons ages 12 to 20, “underage” refers to persons ages two to 20, and “adults” are persons age 21 and above.
- <sup>2</sup> Underage youth are more likely to see on a per capita basis, or be “overexposed” to, a televised ad for alcohol when it is placed on a program where the percentage of underage youth in the audience is greater than the percentage of underage youth in the general population. “More likely to see” or “more popular among” (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,” an industry-standard measure of 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, thereby leveling the measurement playing field for differently sized population segments. See Appendix B for a glossary of terms used in this report.
- <sup>3</sup> L.D. Johnston, P.M. O’Malley, J.G. Bachman and J.E. Schulenberg, *Overall, illicit drug use by American teens continues gradual decline in 2007* (Ann Arbor, MI: University of Michigan News and Information Services, December 11, 2007), table 3. Available at <http://www.monitoringthefuture.org/data/07data/pr07t3.pdf> (accessed December 13, 2007).
- <sup>4</sup> U.S. Department of Health and Human Services, Office of the Surgeon General, *The Surgeon General’s Call to Action to Prevent and Reduce Underage Drinking* (Washington, D.C.: U.S. Department of Health and Human Services, 2007), p. 10.
- <sup>5</sup> U.S. Department of Health and Human Services, Office of the Surgeon General, *The Surgeon General’s Call to Action to Prevent and Reduce Underage Drinking: About the Call to Action*. Available at <http://www.surgeongeneral.gov/topics/underagedrinking/about.html>, (accessed May 22, 2008).
- <sup>6</sup> L. Snyder, F. Milici, M. Slater, H. Sun, Y. Strizhakova, “Effects of Alcohol Advertising Exposure on Drinking Among Youth,” *Archives of Pediatrics and Adolescent Medicine* 160, no. 1 (2006): 18–24; A.W. Stacy, J.B. Zogg, J.B. Unger, C.W. Dent, “Exposure to Televised Alcohol Ads and Subsequent Adolescent Alcohol Use,” *American Journal of Health Behavior* 28, no. 6 (2004): 498–509; R.L. Collins, P.L. Ellickson, D. McCaffrey, K. Hambarsoomians, “Early Adolescent Exposure to Alcohol Advertising and its Relationship to Underage Drinking,” *Journal of Adolescent Health* 40, no. 6 (2007): 527–534; K.E. Pasch, K.A. Komro, C.L. Perry, M.O. Hearst, K. Farbaksh, “Outdoor Alcohol Advertising Near Schools: What Does It Advertise and How Is It Related to Intentions and Use of Alcohol Among Young Adolescents?,” *Journal of Studies on Alcohol and Drugs* 68, no.4 (2007): 587–596; A.C. McClure, S. Dal Cin, J. Gibson, J.D. Sargent, “Ownership of Alcohol-Branded Merchandise and Initiation of Teen Drinking,” *American Journal of Preventive Medicine* 30, no. 4 (2006): 277–283; J.D. Sargent, T.A. Wills, M. Stoolmiller, J. Gibson, F.X. Gibbons, “Alcohol Use in Motion Pictures and Its Relation with Early-onset Teen Drinking,” *Journal of Studies on Alcohol* 67 (2006): 54–65; L. Henriksen, E.C. Feighery, N.C. Schleicher, S.P. Fortmann, “Receptivity to Alcohol Marketing Predicts Initiation of Alcohol Use,” *Journal of Adolescent Health* 42 (2008): 28–35.
- <sup>7</sup> National Research Council and Institute of Medicine, *Reducing Underage Drinking: A Collective Responsibility*, R.J. Bonnie, M.E. O’Connell, eds. (Washington, D.C.: National Academies Press, 2004), pp. 138–140.
- <sup>8</sup> RE: Alcohol Reports, Paperwork Comment, FTC File No. P064505. A Communication from the Chief Legal Officers of the Following States: Arizona, Connecticut, Delaware, Hawaii, Idaho, Illinois, Iowa, Maine, Maryland, New Jersey, New Mexico, New York, Ohio, Oregon, Rhode Island, Utah, Vermont, Washington, Wyoming [California subsequently signed on], May 8, 2006. Available at <http://www.ftc.gov/os/comments/alcoholmanu-facadstudy/522852-01287.pdf> (accessed December 6, 2006).
- <sup>9</sup> U.S. Department of Health and Human Services, Office of the Surgeon General, *The Surgeon General’s Call to Action to Prevent and Reduce Underage Drinking* (Washington, D.C.: U.S. Department of Health and Human Services, 2007), p. 44.
- <sup>10</sup> D. Jernigan, J. Ostroff, C. Ross, “Alcohol Advertising and Youth: A Measured Approach,” *Journal of Public Health Policy* 26 (2005): 312–325.
- <sup>11</sup> © 2007 Nielsen Media Research, Inc. Ratings and other data contained herein are the copyrighted property of Nielsen Media Research, Inc. Unauthorized use of this copyrighted material is expressly prohibited. Violators may be subject to criminal and civil penalties under Federal Law (17 USC 101 et seq.). All Rights Reserved.
- <sup>12</sup> According to Nielsen Media Research estimates of the population in TV households, from January to August 2007, youth ages 12 to 20 were 15.31% of all persons age 12 and older, and from September through December 2007, youth ages 12 to 20 were 15.12% of all persons age 12 and older.
- <sup>13</sup> Cabletelevision Advertising Bureau, “2006 Cable TV Facts: Cable Growth Summary.” Available at [http://www.onetvworld.org/?module=display-story&story\\_id=1371&format=html](http://www.onetvworld.org/?module=display-story&story_id=1371&format=html) (accessed May 30, 2008).
- <sup>14</sup> *Sober Truth on Preventing Underage Drinking Act (STOP Act)*, Public Law 109-422, 109th Cong., 2d sess. (20 December 2006).
- <sup>15</sup> J.G. Becker, testifying before the Senate Committee on Health, Education, Labor and Pensions, Subcommittee on Substance Abuse and Mental Health Services, 108th Cong. 1st sess., September 30, 2003.
- <sup>16</sup> Substance Abuse and Mental Health Services Administration, *Results from the 2006 National Survey on Drug Use and Health: National Findings*, (Rockville, MD:Office of Applied Studies, 2007), 31. Available at <http://oas.samhsa.gov/nsduh/2k6nsduh/2k6Results.pdf> (accessed May 22, 2008).
- <sup>17</sup> U.S. Census Bureau, *National Population Estimates*, May 1, 2007.
- <sup>18</sup> National Research Council and Institute of Medicine, *Reducing Underage Drinking: A Collective Responsibility* (Washington, D.C.: National Academies Press, 2004), pp. 138–140.
- <sup>19</sup> RE: Alcohol Reports, Paperwork Comment, FTC File No. P064505. A Communication from the Chief Legal Officers of the Following States: Arizona, Connecticut, Delaware, Hawaii, Idaho, Illinois, Iowa, Maine, Maryland, New Jersey, New Mexico, New York, Ohio, Oregon, Rhode Island, Utah, Vermont, Washington, Wyoming [California subsequently signed on], 8 May 2006. Available at <http://www.ftc.gov/os/comments/alcoholmanu-facadstudy/522852-01287.pdf> (accessed December 6, 2006).
- <sup>20</sup> D. Jernigan, J. Ostroff, C. Ross, “Alcohol Advertising and Youth: A Measured Approach,” *Journal of Public Health Policy* 26 (2005): 312–325.