

## Clicking with Kids: Alcohol Marketing and Youth on the Internet

## **About the Center on Alcohol Marketing and Youth (CAMY)**

The Center on Alcohol Marketing and Youth at Georgetown University 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.

---

### **Acknowledgment:**

We thank Rex Briggs, Principal, Marketing Evolution; Kathryn Montgomery, PhD, Professor, Public Communication division, School of Communication, American University (Montgomery is also the former president of CME); and Victoria J. Rideout, MA, Vice President and Director, Program for the Study of Entertainment Media and Health at the Henry J. Kaiser Family Foundation for their review and comments. The opinions expressed in this report are those of the authors and do not necessarily reflect those of the foundations or the reviewers.

March 2004

### **Center on Alcohol Marketing and Youth**

Georgetown University  
2233 Wisconsin Avenue, N.W., Suite 525  
Washington, D.C. 20007  
(202) 687-1019  
[www.camy.org](http://www.camy.org)



# Clicking with Kids:

*Alcohol Marketing and Youth on the Internet*

## Table of Contents

---

I.	Introduction	1
II.	Key Findings	2
III.	Youth Online	4
IV.	Underage Access to Alcohol Web Sites	5
V.	The Games in the Alcohol Arcade	7
VI.	A Brave New World	9
VII.	When Is a Cartoon a Cartoon, or Not?	19
VIII.	“Carding” on the Internet	22
IX.	Conclusion	24
X.	Appendices	25

# Clicking with Kids:

## *Alcohol Marketing and Youth on the Internet*

### **I. Introduction**

---

As the Internet has soared in popularity among teenagers in the last decade, public health policymakers have repeatedly shown concern about the appeal and attraction of alcohol Web sites to underage youth. In a nationwide poll conducted last summer, 65% of parents found “very troubling” that alcohol Web sites feature video games and other elements that may appeal to youth.<sup>1</sup> The Center on Alcohol Marketing and Youth (CAMY) offers with this report the most up-to-date cataloguing of the features found on alcohol Web sites and believed to be attractive and appealing to underage youth, as well as an assessment of how easily these sites can be accessed. In addition, this report provides the first public analysis of underage traffic to alcohol Web sites, finding that nearly 700,000 in-depth visits<sup>2</sup> to 55 alcohol Web sites during the last six months of 2003 were initiated by underage persons.

In 1997 and 1999 the Center for Media Education (CME) issued two major reports on alcohol Web sites.<sup>3</sup> The first detailed content on alcohol Web sites that could appeal to underage youth, and the second reviewed the effectiveness of filters and rating systems as means to restrict underage youths’ access to these sites, given their potential for appeal to young people. The Federal Trade Commission (FTC) also reviewed alcohol Web sites in 1997 after the initial round of concerns was raised about their appeal to underage youth.<sup>4</sup> As a result of these concerns, the Beer Institute and the Distilled Spirits Council of the United States (DISCUS) revised their advertising codes in 1997 and 1998, respectively, to address them.<sup>5</sup> Those revisions consisted of having companies: (1) post “reminders” of legal drinking age on Web sites, (2) make alcohol Web site addresses available to parental control software companies, and (3) apply all provisions of marketing codes to Web sites, especially provisions prohibiting content “intended to appeal primarily” or “particularly attractive” to underage youth.<sup>6</sup> These revisions remain the essential elements of the industry’s marketing codes today when it comes to the Internet. Finally, in its 1999 and 2003 reports requested by Congress on the alcohol industry’s advertising and marketing practices, the FTC reported its own findings about features that could attract underage youth, the ease of access to alcohol Web sites, and recommendations to the industry on how to try to restrict access.

When CME first reviewed alcohol Web sites, it found widespread use of features considered attractive to youth: interactive games, cartoons, chat rooms and bulletin boards, logoed clothing and downloads such as wallpapers and screensavers.<sup>7</sup> In its 1999 report, the FTC looked for these same features and found the continued presence of many of them, although chat rooms and bulletin boards were no longer common. Because of the continued use of some of those features by the alcohol industry, the FTC called on the industry in 1999 “to avoid content that would attract underage consumers” and to take steps to restrict access to their Web sites. For the most part, the access recommendations were aimed at self-regulation by the user, who would either type in his/her birthday or affirm being at least 21 years of age.

---

1 Memorandum, “Results of a National Survey of Parents,” from Peter D. Hart Research Associates, Inc./American Viewpoint to All Interested Parties, Washington, DC, June 24, 2003, 4. The poll was conducted for CAMY and is available at <http://camy.org/research/files/hartmemo0703.pdf> (cited 6 January 2004).

2 In-depth visits, reported by comScore Media Metrix, have been defined by CAMY as visits that resulted in more than two page views. This distinction has been used to eliminate from the analysis visits initiated by underage persons who were deterred by a Web site’s age verification process, and thus viewed fewer than three pages.

3 Center for Media Education, *Alcohol and Tobacco on the Web: New Threats to Youth* (Washington, DC: Center for Media Education, 1997); Center for Media Education, *Youth Access to Alcohol and Tobacco Web Marketing: The Filtering and Rating Debate* (Washington, DC: Center for Media Education, 1999).

4 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), 8.

5 Federal Trade Commission, *Self-Regulation in the Alcohol Industry*, 7-8.

6 Federal Trade Commission, *Self-Regulation in the Alcohol Industry*, 7.

7 Center for Media Education, *Alcohol and Tobacco on the Web*, 27-40.

For its September 2003 report, *Alcohol Marketing and Advertising: A Report to Congress*, the FTC surveyed more than 80 alcohol Web sites and found only a dozen sites with interactive features, “such as the opportunity to play a game like dominoes or to click on images of men and women in a cocktail lounge to see what they are saying. These features are presented in a slow-paced, low-key manner; their appeal to today’s youth is uncertain.”<sup>8</sup> As for the issue of access, the FTC report found that the industry had heeded its 1999 recommendation to have potential underage users self-regulate their access by having to state they are over 21.<sup>9</sup> The FTC did not list which sites it surveyed, saying only that they were sites operated by the nine companies that provided the agency information at its request.<sup>10</sup> CAMY included more than 35 sites operated by those nine companies in its review.

So, what is the state of alcohol in cyberspace today?

## II. Key Findings

---

Over a three-week period in October and November 2003, CAMY reviewed 74 Web sites operated by alcohol companies and found widespread use of the kinds of features first catalogued by CME as potentially attractive to underage youth. From video games to downloadable pictures of young women usually reserved for teenage male fantasies to the interactive toys of today’s computer-literate youth such as instant messaging (IM) accessories and customized music downloads, alcohol Web sites offered a parade of attractions that appear to have little to do with the quality or taste of the alcohol product but speak loudly to the culture and mores of the Internet user. At the same time, the alcohol Web sites offered almost no effective mechanisms to keep underage youth from accessing them despite the various steps—reminders of the legal drinking age on the Web site or asking for a birth date, in essence self-policing by the Internet surfer—taken by the industry and called for by the FTC.

CAMY reviewed alcohol Web sites for content from October 22 to November 11, 2003, using categories initially identified by CME as attractive to youth. In its review CAMY found:

### A. Games

- Ten of 15 (67%) beer Web sites featured games such as putt-putt golf, a water-balloon toss, pinball, shooting aliens, car races, a quiz on brewing beer, digital football, and a quiz on the bands (e.g., Blink 182, Def Leppard and Saliva) headlining a recent concert tour.
- Seven of 19 (37%) distilled spirits sites featured games such as air hockey, football trivia, video football, a quiz on drink recipes, and a slot machine.
- Four of 12 (33%) malternative<sup>11</sup> sites featured games such as spin the bottle and car races.
- Only one of 28 (4%) wine Web sites featured a game, and it was a quiz about the user’s “wine profile.”

### B. Interactive and High-Tech

- Downloadable screensavers for personal computers were featured on eight of 15 (53%) beer sites; 10 of 19 (53%) distilled spirits sites; four of 12 (33%) malternative sites and three of 28 (11%) wine sites. The screensavers generally promoted the particular brand, although some were more iconic, including one with bottles and lemons floating underwater and another with a race car.
- Downloadable wallpapers for personal computers were featured on 10 of the 15 (67%) beer sites; nine of the 19 (47%) distilled spirits sites; seven of the 12 (58%) malternative sites and four of the 28 (14%) wine sites. Like the screensavers, the wallpapers generally promoted the particular brand but occasionally also provided iconic images such as race car drivers, beach scenes and a brewery.
- Computer technology offers an interactive and high-tech experience unlike almost any other medium, and the alcohol Web sites offered a wide range of these features. From animation to downloadable, customized music to IM accessories to e-mail features (including one site that allows the sending of “talking” e-mails using animals like hamsters and frogs), alcohol Web sites took full advantage of computer technology and culture. These high-tech/interactive features were found on 13 of the 15 (87%) beer sites; 16 of the 19 (84%) distilled spirits sites; eight of the 12 (67%) malternative sites and 16 of the 28 (57%) wine Web sites.<sup>12</sup>

---

<sup>8</sup> Federal Trade Commission, *Alcohol Marketing and Advertising: A Report to Congress* (Washington, DC: Federal Trade Commission, 2003), 17.

<sup>9</sup> Federal Trade Commission, *Alcohol Marketing and Advertising*, 17.

<sup>10</sup> Federal Trade Commission, *Alcohol Marketing and Advertising*, 17.

<sup>11</sup> “Malternatives” are also referred to as “low-alcohol refreshers,” “alcopops,” or “flavored malt beverages.” Many of the brands in this category, which includes brands such as Mike’s Hard Lemonade and Smirnoff Ice, contain roughly the same amount of alcohol as beer. See, e.g., Federal Trade Commission, *Alcohol Marketing and Advertising: A Report to Congress* (Washington, DC: Federal Trade Commission, 2003), 2.

<sup>12</sup> CAMY considered animation to include any image made to move on the site, including but not limited to streaming video of television commercials, bouncing images or words scrolling across the page; high-tech interactive features included.

## C. Cartoons and Graphics

- Cartoon figures and computer-generated graphics were featured on nine of the 15 (60%) beer sites; eight of the 19 (42%) distilled spirits sites; eight of the 12 (67%) malternative sites and five of the 28 (18%) wine sites.<sup>13</sup>

## D. Kids in Alcohol Land

Much of the concern about content on these Web sites stems from the difficulty in keeping underage youth from accessing them. As the FTC wrote in 1999:

There are, of course, no foolproof measures to prevent underage access to inappropriate Web sites. Companies therefore need to give special attention not only to restricting access, but to ensuring that Web site content is not attractive to underage consumers. Many alcohol Web sites feature one or more promotional techniques—contests, games, cartoon and cartoon-like characters, chat rooms and bulletin boards—that underage visitors may find attractive and that alcohol companies generally do not use in other forms of advertising.<sup>14</sup>

In its 2003 report, the FTC credited the industry with following its recommendations to limit access by having users state they are older than 21:

All of the brewers' sites and most of the vintners' sites had responded to the recommendation, and featured such a system. Most of the distillers' sites instead required that visitors click on a box stating that they are of legal age before entering the site; however, DISCUS has now modified its code to require use of an age verification mechanism which could consist of requiring visitors to enter a birth date over the age of 21 in order to enter an alcohol advertising site.<sup>15</sup>

CAMY's findings were similar to the FTC's. Most of the 74 alcohol Web sites reviewed for content by CAMY did require the user either to enter a birth date or to affirm the user was 21 or older. However, there was no age verification mechanism on any of the sites to assure or test the accuracy of the statements made by the user. As CME wrote in 1999, "How many 16-year-olds would be unable to come up with a 'fake' birthday that would afford them access to the site?"<sup>16</sup> This inability to "card" on the Internet was also recognized by the FTC in its most recent report:

The Commission recognizes that some consumers may indicate an inaccurate date of birth. So long as web site content is not likely to appeal to minors, however, the requirement to enter date of birth may be sufficient, as the alternative is to require site visitors to provide sufficient personal information to permit verification of their adult status.<sup>17</sup>

In the first publicly released analysis of underage traffic to alcohol Web sites, data provided to the Center show that nearly 700,000, or 13.1%, of the total in-depth visits to 55 alcohol sites during the last six months of 2003 were initiated by persons under age 21.<sup>18</sup> The data and analysis on these site visits were provided to the Center by comScore Media Metrix, a leading Internet audience measurement service.

Two distilled spirits Web sites led in the percentage of in-depth site visits initiated by underage persons. One site—[www.bacardi.com](http://www.bacardi.com)—received almost 60% of its in-depth visits from underage persons, and a second site—[www.skyy.com](http://www.skyy.com)—received almost half of its in-depth visits from underage persons.

Two beer Web sites led in the absolute number of underage in-depth site visits. Both sites—[www.budlight.com](http://www.budlight.com) and [www.budweiser.com](http://www.budweiser.com)—had more than 90,000 in-depth visits by underage persons.

In looking at underage visits to alcohol Web sites by category, 15.2% of the in-depth visits to 18 distilled spirits sites were initiated by underage visitors, and 12.8% of the in-depth visits to 16 beer sites were initiated by underage visitors. Six Web sites for malternatives received 8.8% of their in-depth visits from underage youth.

Visitation levels to 15 sites in the wine category were not sufficient to provide reliable results.

In its 2003 report, the FTC noted that, "Three companies provided data showing that between 30% and 70% of consumers exit a site rather than entering their date of birth. It is not known whether this is because they are underage, wish to avoid the inconvenience, or are concerned about privacy."<sup>19</sup> The FTC did not report any data about actual underage visits to alcohol Web sites in its 2003 study.

13 CAMY considered a "cartoon" to be any image that looked like it could be drawn by hand and that resembled in style a cartoon character or scene. Cartoons were prevalent in many of the interactive games. Computer-generated graphics were included in this category, as long as their style was considered cartoon-like.

14 Federal Trade Commission, *Self-Regulation in the Alcohol Industry*, 12-13.

15 Federal Trade Commission, *Alcohol Marketing and Advertising*, 17.

16 Center for Media Education, *Youth Access to Alcohol and Tobacco Web Marketing*, 8.

17 Federal Trade Commission, *Alcohol Marketing and Advertising*, 18.

18 CAMY requested visitation data from comScore Media Metrix for 75 brand-specific alcohol Web sites in the beer, distilled spirits, malternative and wine categories. Using its representative panel of approximately 1.1 million U.S. Internet users who have given comScore explicit permission to confidentially capture their Web-wide browsing, buying and other transaction behavior, comScore provided category visitation data, based on traffic to 55 of the sites provided. Visitation to the remaining 20 sites was not detected among comScore's panel members. comScore provided further insight into consumer behavior at alcohol sites by reporting visitation data—on an individual site basis—for 22 sites that met the minimum reporting criteria of 25,000 visits for the six months ending December 2003. From its panel, comScore delivers the most comprehensive view available of consumer activity—both online and offline. comScore has developed a statistical methodology to ensure the accuracy and reliability of projections to the total population based on its network.

19 Federal Trade Commission, *Alcohol Marketing and Advertising*, 17.

## E. What Can Parents Do?

In addition to its analysis of underage traffic to alcohol Web sites and review of Web-site content, CAMY also tested the leading parental control software packages and the parental controls in two leading Internet service providers to determine how effectively parents could block access to alcohol Web sites. CAMY found wide and uneven variations among the programs: one blocked access to 71 of 72 Web sites reviewed, while two only blocked access to four sites and one failed to block access to any alcohol Web site. Seventy-six percent of alcohol brands eluded parental controls half the time or more. This review was conducted from April to August 2003.<sup>20</sup>

**Table 1: Ability of Parental Controls to Block Alcohol Sites, By Program**

Program	Number of Sites Blocked	% of Sites Blocked
MSN 8.0	71	99%
Cyber Patrol 6	50	69%
AOL 8.0	49	68%
Norton Internet Security 2003	48	67%
Cyber Sitter 2002	26	36%
Net Nanny 5	4	6%
Cyber Sentinel 2.0	4	6%
McAfee Parental Controls	0	0%

## III. Youth Online

The Internet's fast-paced multimedia environment is a comfortable fit for today's teen, and, though the gap is narrowing, parents trail children in their attraction to and acquaintance with cyberspace. According to the Pew Internet & American Life Project, "64% of online teens say they know more about the Internet than their parents, and 66% of parents agree."<sup>21</sup> Of the 88% of teens who have a home computer, 89% have access to the Internet.<sup>22</sup> Increasing numbers of children are also able to access the Internet at school, and 60% report that they use the Internet "somewhere else"—away from home and from school.<sup>23</sup>

A survey conducted in late 2000 found that 17 million teens between the ages of 12 and 17 use the Internet.<sup>24</sup> According to CME, "teens are the *defining users* of this digital media culture."<sup>25</sup> Teens are as comfortable with the Internet as "their parents' generation was with the telephone and TV."<sup>26</sup> As the chart below shows, teens (12 to 17) are more likely than adults to use the Internet to relax and explore the online environment.<sup>27</sup>

**Table 2: Teens' Internet Use Compared to Adults**

Online Activity	Teens	Adults
Go online for fun	84%	63%
Look for info about movies or other leisure activities	83%	65%
Use instant messaging	74%	44%
Play or download games	66%	34%
Listen to music online	59%	40%
Visit a chat room	55%	26%
Download music	53%	29%
Check sports scores online	47%	38%

## Protecting Youth Online

How best to protect youth online has been the source of considerable debate. According to the Pew Internet Project, "Sixty-two percent of parents express a lot or some concern about what their children might seek out or stumble across on the Internet," and 45% worry it will lead youth "to do dangerous or harmful things."<sup>28</sup>

Though much of the conversation about protecting children in cyberspace has centered on pornographic materials, hate speech, privacy violations and online predators, both the FTC and CME have recognized the importance and challenge of protecting children from online alcohol marketing. In addition, a nationwide poll of parents of teens conducted by Peter D. Hart Research Associates and American Viewpoint for CAMY in the summer of 2003 reported that 65% of parents find the fact that alcohol companies produce marketing Web sites that include video games and other features that appeal to young people "very troubling."<sup>29</sup>

20 Of the eighty Web sites, results for six sites for the content review procedure and eight sites for the access tests were eliminated from the study to address discrepancies found during the testing procedures, leaving 74 sites reviewed for content and 72 tested for access. See Appendix A for details.

21 Amanda Lenhart, Lee Rainie, and Oliver Lewis, *Teenage life online: The rise of the instant-message generation and the Internet's impact on friendships and family relationships* (Washington, DC: Pew Internet & American Life Project, 2001), 5. The Pew Internet & American Life Project is funded by a grant from The Pew Charitable Trusts' information cluster.

22 Teenage Research Unlimited, Fall 2003, Wave 42, S-74.

23 UCLA Center for Communication Policy, *The UCLA Internet Report—"Surveying the Digital Future"* (Los Angeles: UCLA Center for Communication Policy, 2003), 65.

24 Lenhart, Rainie, and Lewis, *Teenage life online*, 3.

25 Center for Media Education, *TeenSites.com: A Field Guide to the New Digital Landscape* (Center for Media Education: Washington, DC, 2001), 1.

26 Center for Media Education, *TeenSites.com*, 1.

27 Chart excerpted from Lenhart, Rainie, and Lewis, *Teenage life online*, 37.

28 Lenhart, Rainie, and Lewis, *Teenage life online*, 30.

29 Memorandum, "Results of a National Survey of Parents," from Peter D. Hart Research Associates, Inc./American Viewpoint.

Alcohol companies promote their sites heavily. In addition to banner advertising on the Web itself directing users to alcohol sites, alcohol companies frequently include product Web site addresses in print, broadcast and outdoor advertising and on product containers.

In 1997, CME analyzed the commercial content of more than 100 alcohol and tobacco sites, and found that alcohol and tobacco companies were “using the online media to advertise and promote their products, through a variety of marketing techniques that capitalize on the medium’s strong and unique attraction for young people.”<sup>30</sup> A 1998 update from CME found that 62% of the 77 alcohol sites examined made some appeal to youth, including 82% of beer and 72% of distilled spirits sites.<sup>31</sup> CME’s 1999 follow-up report looked at parental control software packages and found that of the six stand-alone packages they tested, only one blocked access to more than half of the alcohol and tobacco promotional sites.<sup>32</sup>

For its 1999 report, the FTC reviewed 30 alcohol Web sites using a questionnaire that looked at a number of features:<sup>33</sup>

- Does the site have a statement on its home page or elsewhere saying it is limited to persons age 21 or older?
- Does the site ask the user to state his or her age? Does the site ask for this information a number of times?
- Does the site have a warning that alcohol should not be used by persons under 21? And does the site have any responsible drinking messages?
- Does the site have content that is potentially “attractive to children,” including cartoon characters, games/contests, prize promos, chat rooms, bulletin boards, virtual bars, screensavers, sale of logoed products, wallpaper and animation?

Because there are “no foolproof measures” to restrict underage access, the FTC concluded, “Companies therefore need to give special attention not only to restricting access, but to ensuring that Web site content is not attractive to underage consumers.”<sup>34</sup> In its 2003 report, the FTC seemingly found improvement in the content of the 80 sites it reviewed: “With some exceptions, the content of the web sites is mild.”<sup>35</sup>

## IV. Underage Access to Alcohol Web Sites

The debate about the appeal of Web sites to underage youth has suffered, in part, from a lack of data. To address that, CAMY contracted with comScore Media Metrix, a leading Internet audience measuring service, to provide data on in-depth site visits to the 75 Web sites CAMY reviewed for content. The Center was provided with aggregate data for 55 sites for which comScore Media Metrix reported traffic. These 55 sites included 16 beer sites, 18 distilled spirits sites, six malternative sites and 15 wine sites. For the purposes of this report, in-depth visits have been defined by CAMY as visits that resulted in more than two page views. This distinction has been used to eliminate from the analysis visits initiated by underage persons who were deterred by a Web site’s age verification process, and thus viewed fewer than three pages. Twenty-two sites generated sufficient data to be reported individually by comScore Media Metrix.

For all 55 sites, there were 8,215,526 visits from July 2003 through December 2003, but only 5,218,002 of those visits were classified as in-depth visits. Of those in-depth visits, 683,558—13.1%—were initiated by underage persons.<sup>36</sup>

**Table 3: Alcohol Site Traffic, By Category**

Six Months Ending December 2003						
Category	Total Visits	Total In-Depth Visits	In-Depth Visits			
			Underage		Legal-Age	
			#	% of Total In-Depth Visits	#	% of Total In-Depth Visits
Beer	4,698,565	3,287,237	420,766	12.8%	2,866,471	87.2%
Distilled Spirits	2,323,871	1,158,112	176,033	15.2%	982,079	84.8%
Malternatives	809,219	653,605	57,517	8.8%	596,088	91.2%
Wine	383,871	119,048	**	**	**	**
Grand Total	8,215,526	5,218,002	683,558	13.1%	4,534,444	86.9%

\*\* Insufficient sample sizes

Source: comScore Media Metrix XPC

For the 22 alcohol sites with traffic levels high enough to be reported individually, there were a total of 7,466,390 visits during the last six months of 2003, with 4,933,867 of those classified as in-depth visits. Of those in-depth visits, 611,800, or 12.4%, were initiated by underage persons.

30 Center for Media Education, *Alcohol and Tobacco on the Web*, 1, 10.

31 Sally Beatty, “Study Finds Alcohol Marketers Boosting Online Pitches to Youth,” *Wall Street Journal*, Thursday, 17 December 1998, sec. B, p. 10; “National News Briefs: On-Line Ads Lure Youths, Study Says,” *New York Times*, Sunday, 20 December 1998, sec. 1, p. 46.

32 Center for Media Education, *Youth Access to Alcohol and Tobacco Web Marketing*, 3.

33 Federal Trade Commission, *Self-Regulation in the Alcohol Industry*, 13; Federal Trade Commission, Appendix G, *Self-Regulation in the Alcohol Industry*.

34 Federal Trade Commission, *Self-Regulation in the Alcohol Industry*, 12-13.

35 Federal Trade Commission, *Alcohol Marketing and Advertising*, 17.

36 In its 2003 report, the FTC noted, “Three companies provided data showing that between 30% and 70% of consumers exit a[n alcohol company Web] site rather than entering their date of birth. It is not known whether this is because they are underage, wish to avoid the inconvenience, or are concerned about privacy” (Federal Trade Commission, *Alcohol Marketing and Advertising*, 17). For the 55 alcohol sites measured, comScore Media Metrix data show that 34% of all visits ended with fewer than three page views. Among underage persons, 30% of visits ended with fewer than three page views. It is not possible, however, to determine what role age verification systems played in these findings.

**Table 4: Alcohol Site Traffic, By Web Site**

Six Months Ending Dec 2003				
Site	Total Visits	Total In-Depth Visits	% of Total In-Depth Visits From Underage	% of Total In-Depth Visits From Legal-Age
bacardi.com	127,117	99,163	58.6%	41.4%
skyy.com	38,597	27,860	47.4%	52.6%
budlight.com	529,393	277,108	34.0%	66.0%
rollingrock.com	113,812	74,381	33.4%	66.6%
smirnoff.com	115,348	62,991	33.0%	67.0%
cuervo.com	190,541	54,638	21.7%	78.3%
jimbeam.com	33,050	23,908	20.3%	79.7%
corona.com	157,925	98,986	17.2%	82.8%
budweiser.com	1,106,451	688,089	15.2%	84.8%
guinness.com	125,256	97,977	11.7%	88.3%
amstellight.com	370,696	286,505	10.3%	89.7%
absolut.com	113,546	92,526	9.5%	90.5%
coorslight.com	620,491	412,348	8.2%	91.8%
countrycocktails.com	42,264	38,550	8.2%	91.8%
smirnoffice.com	617,123	504,088	7.9%	92.1%
heineken.com	440,248	356,888	7.4%	92.6%
millertime.com	954,517	885,700	7.0%	93.0%
crownroyal.com	336,171	137,976	5.8%	94.2%
jackdaniels.com	1,061,157	534,593	5.6%	94.4%
mikeshardlemonade.com	123,522	92,272	5.2%	94.8%
beringer.com	74,060	22,931	4.7%	95.3%
michelob.com	175,106	64,390	2.0%	98.0%
<b>Grand Total</b>	<b>7,466,390</b>	<b>4,933,867</b>	<b>12.4%</b>	<b>87.6%</b>

Note: Data for additional sites provided by CAMY were insufficient to report on an individual basis, but were included in category roll-ups.

Source: comScore Media Metrix XPC

**Table 5: Alcohol Site Traffic, By Web Site and Underage/Legal-Age Visits**

Six Months Ending Dec 2003		
Site	In-Depth Visits By Site	
	Under 21	Over 21
budweiser.com	104,590	583,499
budlight.com	94,217	182,891
millertime.com	61,999	823,701
bacardi.com	58,110	41,053
smirnoffice.com	39,823	464,265
coorslight.com	33,813	378,535
jackdaniels.com	29,937	504,656
amstellight.com	29,510	256,995
heineken.com	26,410	330,478
rollingrock.com	24,843	49,538
smirnoff.com	20,787	42,204
corona.com	17,026	81,960
skyy.com	13,206	14,654
cuervo.com	11,856	42,782
guinness.com	11,463	86,514
absolut.com	8,790	83,736
crownroyal.com	8,003	129,973
jimbeam.com	4,853	19,055
mikeshardlemonade.com	4,798	87,474
countrycocktails.com	3,161	35,389
michelob.com	1,288	63,102
beringer.com	1,078	21,853
<b>Grand Total</b>	<b>611,800</b>	<b>4,322,067</b>

Note: Data for additional sites provided by CAMY were insufficient to report on an individual basis, but were included in category roll-ups.

Source: comScore Media Metrix XPC

## V. The Games in the Alcohol Arcade

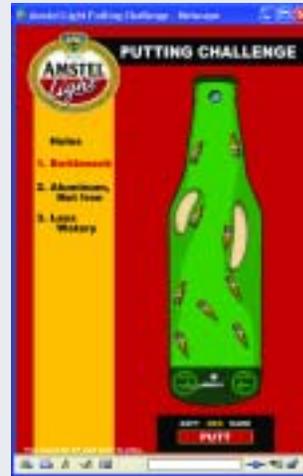
---

Of the 74 alcohol sites reviewed by CAMY in October and November 2003, 22 featured games, and usually multiple games were available on a site. Most of the games were similar to those offered by Nintendo, Sony PlayStation, Microsoft Xbox, and online arcades or to those found in the video game arcades routinely frequented by youth at shopping malls or beach resorts. For instance:

- Amstel Light's Web site offered the user the opportunity to play a kind of putt-putt golf with Amstel Light bottles or cans as the course hazards;
- Bud Light's Web site offered the user the chance to blast alien space ships or play pinball;
- Bacardi's Web site offered the user the opportunity to play "virtual quarters" or air hockey; and
- car races were found on the Web sites for Miller beers and Smirnoff Ice.

Some of the sites did offer games not associated with youth, such as a quiz on the Absolut Web site for drink recipes or Bolla's quiz on the user's wine profile, but these were clearly the exception among the alcohol Web sites.

Figure 1: Amstel Light Putting Challenge



[www.amstellight.com](http://www.amstellight.com)

Figure 2: Bud Light Blaster



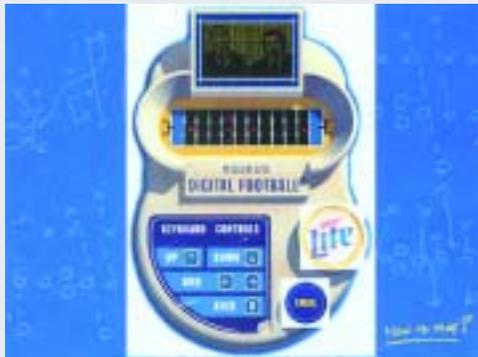
[www.budlight.com](http://www.budlight.com)

Figure 3: Bud Light Pinball



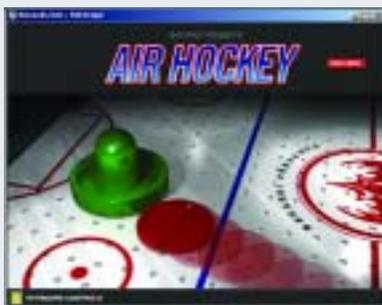
[www.budlight.com](http://www.budlight.com)

**Figure 4: Miller Lite Digital Football**



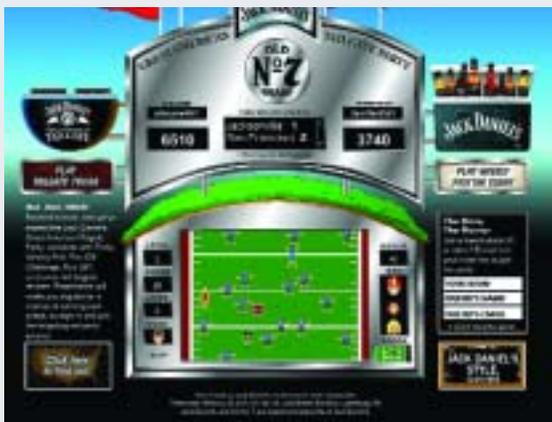
www.millertime.com

**Figure 5: Bacardi Air Hockey**



www.bacardi.com

**Figure 6: Jack Daniel's Run 361 Football Game**



www.jackdaniels.com

**Table 6: Games on Beer Web Sites**

Brand	Features
Amstel Light	Putting Challenge: Putt ball through bottle-shaped, glass-shaped or can-shaped green as bottles fall Summer Beach Game: Find items hidden in the sand in the least amount of time possible Alpine Extreme: Simulated ski game
Bud Light	Summer Soak 'Em: Water balloon toss at targets on beach Bud Light Pinball Blaster: Shooting at aliens
Budweiser	Budweiser Tradin' Paint: Car racing game LongBall Challenge: Pinball-like baseball game 3D track and field game Brewmaster Challenge: Quiz on how to brew beer Buy Me a Bud: Challenge friends via e-mail to a brew trivia quiz, with loser picking up the tab at next outing Movie Star Match-Up: Movie and movie star trivia
Busch	Busch Racing Challenge: Virtual racing obstacle course Busch Fishing Challenge: Test your fishing skills
Coors Light	Slingin' The Brew: Deliver beer to customers at outdoor bar
Corona	Dunk-A-Cell: Eradicate cell phones as they interrupt relaxation on the beach Lime Football: "Kick" limes through bottles as goalposts Sliding Picture Puzzle game
Heineken	"Heineken Says" game
Michelob	Girls' Night Out game with "would you rather ..." options
Millertime (MGD, Miller Lite, Miller High Life)	Miller Lite Digital Crew Chief Miller Lite Digital Football Miller Lite Virtual Racing League
Rolling Rock	Name that Tune: Check knowledge of the bands that played at Town Fair IV (Concert with blink182, Def Leppard, Saliva, 311, etc.)

**Table 7: Games on Distilled Spirits Web sites**

Brand	Features
Absolut	Absolut Reality Drink Quiz Absolut Reality Drink Mixing: Make own drink recipe according to instructions Absolut Vanilia Drink Mixer: Choose when/taste/where/character of drink, and site gives applicable drink recipe Pick-Up Line Generator: Based on personality—traditional, sensitive, or desperate
Bacardi	Virtual Quarters, Air Hockey, and game archive including Kissing in the Dark, Party Snake, Iceberg, Power Boarding, Factory, Prohibition
Captain Morgan	Save the Morganettes! video game Parrot Bay Sense Booster: Drag icons/words and change “deadline” into “conga line,” etc.
Dewar’s	Dewar’s Blending Challenge: Combine a selection of whiskies to create Dewar’s unique blend
Jack Daniel’s	Tailgate Trivia: Football trivia Run 361: Football video game QB Challenge: Complete as many football passes as possible in three minutes
Seagram’s 7	The 7-Shot Glass Shuffle The Lucky 7 Slot Machine Game Links to other game Web sites
Skyy	Skyy Cinema Trivia Challenge

**Table 8: Games on Malternative Web Sites**

Brand	Features
Bacardi Breezer	Bacardi Ice Breaker: “Use the Bacardi cap to eliminate the ice bricks. Free the iced Bacardi Breezer bottles” Party Conveyor: “Your job is to direct the bottles to the people preferring a specific Bacardi flavor”
Bacardi Silver	Bacardi Silver Quiz/poll: “Appetizers Do’s and Don’ts” Spin the Bacardi Silver
Smirnoff Ice	Smirnoff Ice Triple Black Racing Challenge
Two Dogs	Two Dogs game: Help “Sweet Lemon,” one of the Two Dogs bulldogs, navigate through bottles to get home

**Table 9: Games on Wine Web Sites**

Brand	Features
Bolla	Passion Quiz: What’s your wine profile?

## VI. A Brave New World

The computerized world of today’s youth is intensely personalized and fast-paced, and alcohol Web sites offer many features that provide those appeals, such as screensavers/wallpapers, animation, IM icons and e-mail. Twenty-five of the 74 Web sites offered downloadable screensavers to the user, and 30 of the sites offered wallpapers. The screensavers and wallpapers, for the most part, turn the users’ personal computer into a billboard for the product, and consequently have the great marketing value of associating an individual with the product. In fact, it was this kind of individual endorsement of the product that caused the public health community to be concerned with the “trinkets and trash” of the tobacco industry: e.g., the baseball hats, jackets, t-shirts and backpacks emblazoned with tobacco product logos that turned youths into walking billboards for cigarettes and smokeless tobacco.<sup>37</sup>

Of the 15 beer Web sites, eight offered downloadable screensavers, and 10 offered downloadable wallpapers. Of the 19 distilled spirits sites, 10 offered screensavers and nine offered wallpapers. Of the 12 malternative sites, four offered screensavers and seven offered wallpapers. Of the 28 wine sites, three offered screensavers and four offered wallpapers.

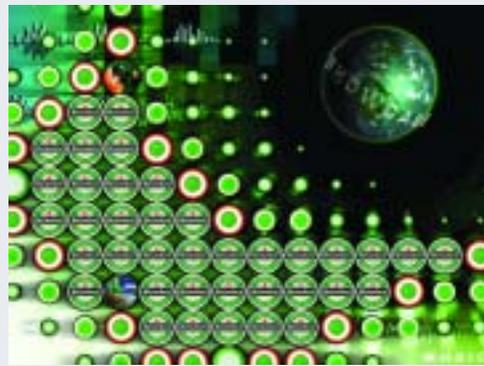
<sup>37</sup> See, e.g., U.S. Department of Health and Human Services, *Preventing Tobacco Use Among Young People: A Report of the Surgeon General* (Atlanta: U.S. Department of Health and Human Services, 1994), 186; Institute of Medicine, *Growing Up Tobacco-Free: Preventing Nicotine Addiction in Children and Youths* (National Academies Press, 1994), 110; Maura Lerner, “The great smoking debate; Smoking foes are hot about logo-laden merchandise,” *Star Tribune*, 16 November 1995, p. 1A.

Figure 7: Coors Light Twins Screensaver



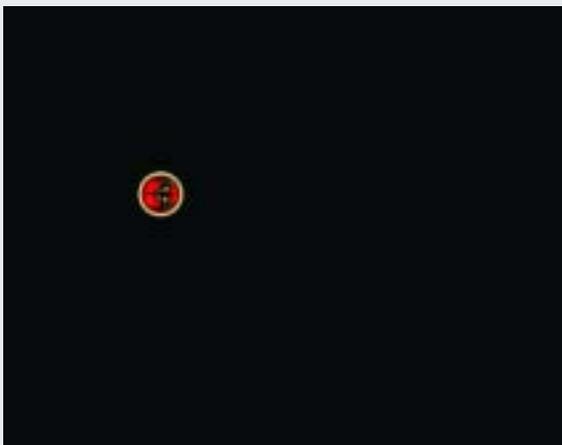
[www.coorslight.com](http://www.coorslight.com)

Figure 8: Heineken "Beer Mat" Screensaver



[www.heineken.com/usa/](http://www.heineken.com/usa/)

Figure 9: Bacardi Bat Icon Screensaver



[www.bacardi.com](http://www.bacardi.com)

Figure 10: Seagram's Gin Calendar Screensaver



[www.seagramsginlive.com](http://www.seagramsginlive.com)

Figure 11: Doc's Hard Lemon Screensaver



[www.docshardlemon.com](http://www.docshardlemon.com)

Figure 12: Smirnoff Ice Triple Black Logo Screensaver



[www.smirnoffice.com](http://www.smirnoffice.com)

**Table 10: Screensavers on Beer Web Sites**

Brand	Features
Amstel Light	Screensaver with Amstel Light logo surrounded by leaves Summer screensaver with figures on beach drinking beer
Budweiser	Budweiser bottle screensaver Flashing lights resembling True Music icon screensaver
Busch	Busch outdoors screensaver
Coors Light	Twins screensaver
Corona	Corona Sun screensaver with beach images as reward for filling ice chest with Corona beer
Guinness	Three screensavers with Guinness logo: draught, cast, bread
Heineken	Various screensavers with logo, including "Bottle Top," "The Millennium," "Beer Mat" and "Bottle"
Michelob	Michelob Ultra logo screensaver

**Table 11: Screensavers on Distilled Spirits Web Sites**

Brand	Features
Absolut	Absolut Generations screensaver: one for every Absolut artist included on site
Bacardi	Bacardi bottle and bat icon screensavers
Canadian Mist	"Taste Canada's Best" screensaver with Canadian Mist logo
Dewar's	Screensavers including one with various "Highlander" cartoons and Dewar's logo
Jack Daniel's	Screensavers with JD logo on each: "Spotlight," "Tour Stops," "Scenes & Sayings"
Jim Beam	Screensavers including electric guitar with Jim Beam logo and Jim Beam logo on red background
Jose Cuervo	Cuervo logo screensaver
Seagram's 7	Animated screensaver with interactive bartender who juggles bottles
Seagram's Gin	Seagram's Gin calendar screensaver
Skyy	Screensavers with images from "Skyy Cinema" campaign

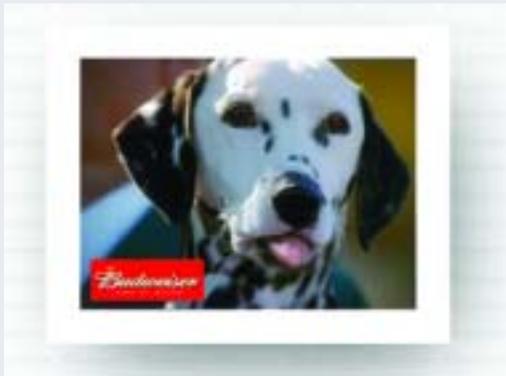
**Table 12: Screensavers on Malternative Web Sites**

Brand	Features
Bacardi Breezer	Screensaver with bottles of different flavors of Bacardi Breezer
Bacardi Silver	"Power nap" screensaver with pink designs and bubbles
Doc's Hard Lemon	Screensaver with Doc's Hard Lemon bottles and floating lemons
Smirnoff Ice	Smirnoff Ice "exclusive" screensaver with racing car Smirnoff Ice Triple Black logo screensaver

**Table 13: Screensavers on Wine Web Sites**

Brand	Features
Luna di Luna	Screensaver with Luna di Luna logo
Moet & Chandon	"Esprit du siecle" screensaver with man drinking out of bottle
Santa Margherita	Screensaver with Venus flytrap-type plant drinking wine and wine bottle with Santa Margherita logo

Figure 13: Budweiser Dalmatian Wallpaper



[www.budweiser.com](http://www.budweiser.com)

Figure 14: Busch Western Girl Wallpaper



[www.busch.com](http://www.busch.com)

Figure 15: Coors Light "Krista" Maxim Wallpaper



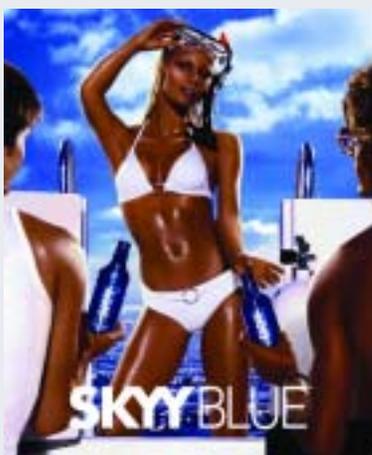
[www.coorslight.com](http://www.coorslight.com)

Figure 16: Captain Morgan "Morganettes" Wallpaper



[www.captainmorgan.com](http://www.captainmorgan.com)

Figure 17: Skyy Blue Print Ad Wallpaper



[www.skyyblue.com](http://www.skyyblue.com)

Figure 18: Doc's Hard Lemon Plumber Wallpaper



[www.docshardlemon.com](http://www.docshardlemon.com)

**Table 14: Wallpapers on Beer Web Sites**

Brand	Features
Amstel Light	Amstel Light bottle, summer scene, beach scene and winter scene
Bud Light	Beer bottle image highlighted on blue background
Budweiser	Many available, including: Dalmation photo with Budweiser logo in corner Bottle highlighted on dark background B for Budweiser in True Music logo Photos of draft beer Neon sign logo Clydesdales and other horses NASCAR racing images, including racing stars
Busch	Western girl wallpaper and NASCAR racing scenes wallpaper
Coors Light	Various wallpapers including: Coors Light Twins "Krista" (participant in Coors Light Maxim Girl Search) Coors Light Mountain Jam "Get some summer" desktop calendar
Corona	Multiple beach images with Corona logo
Guinness	Wallpapers with different themes: draught, shower, cast, bread
Heineken	Various wallpapers including: "Schipol," "Heineken Flag," "Leidseplein," "Neon," "Brewery," and "Shadow"
Michelob	Michelob Ultra logo and Michelob Ultra bottle wallpapers
Yuengling	Yuengling logo on red background wallpaper

**Table 15: Wallpapers on Distilled Spirits Web Sites**

Brand	Features
Absolut	Wallpaper based on various themes: Absolut Origin ad, Absolut Halo ad, Absolut Sanctity ad Wallpaper for each Absolut artist featured
Bacardi	Various wallpapers, including an old/vintage Bacardi ad, "The Cuba Libre" and "The Mojito" wallpapers with recipes
Canadian Mist	Various wallpapers with "Taste Canada's Best" message and Canadian Mist logo
Captain Morgan	Various "Morganettes" wallpapers
Dewar's	Various wallpapers, including two with cartoons
Jack Daniel's	Various wallpapers, all including Jack Daniel's bottle
Jim Beam	Various wallpapers, including Jim Beam Music wallpaper featuring an electric guitar with the JB logo
Jose Cuervo	Cuervo bottle and Cuervo logo wallpaper
Skyy	Wallpaper with featured Skyy vodka ads

**Table 16: Wallpapers on Malternative Web Sites**

Brand	Features
Bacardi Breezer	Wallpaper with Bacardi Breezer bottles
Doc's Hard Lemon	Wallpaper with image of young woman fixing plumbing under sink with Doc's logo in the foreground Doc's Hard Lemon logo wallpaper
Mike's Hard Lemonade	Wallpapers with tree bearing bottles instead of fruit, a bottle that looks like it's "blasting" forward, and multicolored Mike's Hard Lemonade bottles in a row with logo at the bottom
Skyy Blue	Wallpapers of Skyy Blue print ads
Smirnoff Ice	Various, including: "Intelligent nightlife" glowing Smirnoff bottle, racing flag with racer's name, and Smirnoff Ice race car
Two Dogs	Various wallpapers featuring the Two Dogs bulldogs and the Two Dogs bottle and logo
Zima	"Start Something" Zima cityscape wallpaper with Zima bottle

**Table 17: Wallpapers on Wine Web Sites**

Brand	Features
Fetzer	Desktop calendar wallpaper with Fetzer logo
Luna di Luna	Various, including brightly colored wine bottles featuring the Luna di Luna logo
Moet & Chandon	Various, including models featured with wine bottles
Sutter Home	MoodMaker desktop application with two seasonal wallpapers

Figure 19: Bud Light Making Faces



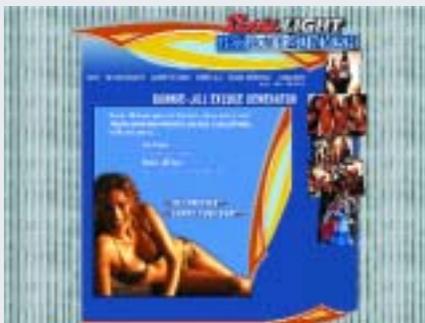
www.budlight.com

Figure 20: Millertime Network



www.millertime.com

Figure 21: Coors Light Bonnie-Jill Excuse Generator



www.coorslight.com

Figure 22: Heineken Headline Hoax for Maxim and Sporting News



www.heineken.com/usa/

Figure 23: Captain Morgan Captunes: Captain's MP3 Player



www.captainmorgan.com

Figure 24: Smirnoff Ice Video Mixer



www.smirnoffice.com

Figure 25: Bacardi Silver 8-Track E-Card



www.bacardisilver.com

Web designers use the latest technology to help make a site appealing and attractive to users. These high-tech features also take advantage of the virtual community the Internet offers with e-mail and IM. Such features can turn the user into a virtual marketer for the product as he/she sends e-mails with ads to friends or plays one of the games that calls for sending an e-mail to a friend. In fact, the alcohol Web sites reviewed by CAMY showcased the latest in Web technology in many instances. Animation, for instance, was widespread, with 12 of the 15 beer Web sites offering that feature, as well as 16 of the 19 distilled spirits sites, seven of the 12 malternative sites and 14 of the 28 wine sites.<sup>38</sup> Since some sites are run by Flash technology, they may contain dozens of different animations. Many of the sites also provided high-tech “interactive” features such as the ability to send e-mails, personalize the user’s IM message with a product logo or other image available on the alcohol Web site,

receive notification of upcoming events like concerts and sporting events sponsored by the various alcohol brands, and create CDs with personalized music selections. For instance, the Bud Light site allowed the user to send e-mails to friends in the form of talking animals such as hamsters or frogs, and the Bacardi site allowed the user to adorn his/her IM message with the Bacardi Bat. The Absolut site allowed the user to download club-type music for his or her future enjoyment, and the Smirnoff Ice site allowed the user to mix video and music clips to e-mail to friends. And taking its cue from practical joking antics of the television shows *Punk’d* (MTV) and the *Jamie Kennedy Experience* (WB), the Heineken site offered the opportunity to “hoax” a friend by creating a mock-up of an embarrassing headline about the friend on a popular Web site (e.g. Maxim.com) and then sending the link to the mock-up to the friend as well as several mutual friends.

**Table 18: Interactive/High-Tech Features on Beer Web Sites**

Brand	Features	Brand	Features
Amstel Light	Send videos of Amstel Light television ads to friends IM icon library: Halloween icons, Amstel Light logo icons, seasons icons, golf icons Create an animated e-vite with Amstel Light background	Budweiser	Giving Lip: Send a talking e-mail with uploaded photo; also available in Spanish Red carpet celebrity photos from Budweiser-hosted events Audio downloads for computer sounds—“A Grand Opening,” “The Perfect Pour,” “Cheers!,” and “Beautiful Music” AOL Instant Messenger icons Budweiser postcards that can be sent to friends via e-mail Budweiser e-mail account— yourname@budweiser.com “World of Budweiser” animated video Sports: “Conservationist of the Year” poll for 2004— Budweiser gives \$50,000 award to winner Sports: Dale Earnhardt Jr. section Sports: Brandon Bernstein section Entertainment: Six movie trailers including “In the Cut” (Oct. 2003 from Sony Pictures), “Something’s Gotta Give” (Dec. 2003 from Sony Pictures), “Alien Director’s Cut” (Oct. 2003 from Sony Pictures) True Films: Three funny Budweiser-produced short films that take Bud TV commercials and expand on them: “Gas, Food, Beer,” “Company Man,” “Best Man” Prey for Rock and Roll—featuring L.A. rock scene with info on featured singer and two songs to listen to Music: True Music Live—features band called “Know Boundaries” as well as two weekly highlight bands Music: One Night Stand Budweiser concert tour so fans can “get up close and personal with the hottest bands” Music: Artist of the Month: “The Dandy Warhols”— music video and band bios Music: Featured DJ Mark Ronson—users can listen to a track of his music Music: Create your own True Music CD: listen to samples and choose music, sort songs, choose CD cover, download and burn CD
Bud Light	Making Faces: Send a talking e-mail with animal or character image of choice, or with talking, uploaded photo Send a Bud Light (send an e-mail with Bud Light bottle image to a friend to “get them excited about Happy Hour;” text reads “This one’s on me.”) Sign up for a Bud Light e-mail address See Bud Light television commercials Music: Promotion of bands with pictures and concert schedules: 3DoorsDown, Juanes, Tim McGraw Sports: WNBA section with schedules and info/pictures of WNBA Sports: Snowboarding section with schedule of events and images of snowboarding Sports: Supercross racing with schedules, profile of Jeremy McGrath Sports: Lacrosse with schedules, info on MLL, and images of favorite players Sports: NHL with news of hockey, “bubble boys” section, “check out” favorite stars in their off-time Sports: AVP with schedule of events, photos of volleyball playing, highlights from 2003 season Too Much Info: Trivia section with nothing to do with brand Top Ten List: Lists “Top Ten Things Not to Do at a Wedding” in David Letterman-type humor Desktop Theme—download icons that replace “My Documents” and “Recycle Bin” icons on desktop Bud Light sounds to download to replace normal computer sounds (beeps, error sounds, etc)		

(continued)

38 CAMY considered animation to include any image made to move on the site, including but not limited to streaming video of television commercials, bouncing images or words scrolling across the page; high-tech interactive features included.

**Table 18: Interactive/High-Tech Features on Beer Web Sites (continued)**

Brand	Features	Brand	Features
Busch	NASCAR: Busch racing report, racing schedule, driver standings NASCAR: "Pit stop" interview with Scott Wimmer Sports: B.A.S.S. fishing/outdoors section Video commercial before entry into the site	Heineken	Sliding panels on homepage that flip over when mouse is held over them Sound file downloads: Filling a Glass, Opening a Can Windows Media Player Skin, Heineken WinAmp Skin Icons for desktop, Heineken Can Icon Heineken headline hoax—"create a (fake) hilarious headline about your friends" to appear on the Maxim Online or Sporting News Web sites Link to Heineken Music Initiative with "Red Star sounds" Heineken event finder Send a Heineken e-vite
Coors Light	AOL Instant Messenger icons Music: Downloads from Coors Light Mountain Jam Iron-on download—print silhouette of curvy woman on iron-on paper and make your own t-shirt Bonnie-Jill Excuse Generator—ask image of woman in bikini a question, and she'll help user come up with an excuse Coors Light Mountain Jam 2003 page with snap shots, press clips and downloads from the concert Coors Light television commercials: "Wingman," and Kid Rock "Feel This" Animated introduction to Coors Light Maxim Girl Search	Labatt	Moving images upon entering the site
Corona	Sign up for updates about Corona Corona "Promotional Shack" reflecting various holiday themes, e.g., "Halloween" Send a postcard showing one of three Corona beach scenes Music: Jimmy Buffett 2003 Tour Dates Animated beach scenes depicting the Corona "miles from the ordinary" theme	Michelob	Playboy triplets "behind the scenes" video download, Playboy triplets photos, Girls' Night Out e-mail postcard
Guinness	Personality test—find out personality type based on how you "hold your pint" Send an e-card Animated video as introduction to the site	Millertime (MGD, Miller Lite, Miller High Life)	Millertime network toolbar—insert a permanent search line for Millertime events into Internet Explorer Millertime search for food/events/clubs/bars based on zip code See Miller brands television commercials
		Old Milwaukee	Link from image on home page to Country Concert info for 2004 Old Milwaukee racing: profile of race car driver Eric Wilson
		Rolling Rock	Listen to music samples from Town Fair IV, see photos from event, learn about bands Animated spin a bottle feature—click on different parts of the bottle to get information

**Table 19: Interactive/High-Tech Features on Distilled Spirits Web Sites**

Brand	Features	Brand	Features
Absolut	<p>Highly animated site: video entrance to site and between parts of site, multiple videos under “Absolut Reality”</p> <p>Follow hypothetical characters Alexa and Jason on their “Night Out” on the town and as they meet each other; depictions of their evening scroll across the screen</p> <p>Music: Absolut club music downloads and videos</p> <p>Tell a friend about the site through e-mail</p> <p>Shooters recipes</p> <p>Absolut Vanilla e-vites</p> <p>“Virtual” art gallery that user can navigate</p> <p>PDA downloads</p>	Jack Daniel’s	<p>Virtual drinks: Have a drink online complete with sounds (pouring the whiskey, ice clinking in a glass, etc.)</p> <p>Animated front page with moving images</p> <p>Send an e-postcard</p> <p>Sponsorship news</p> <p>Tailgate tour events and football calendars</p>
Bacardi	<p>Party Planner: suggests how to have parties with following themes: disco, casino night, salsa, cocktail party, NYC loft party</p> <p>Send a bat e-vite</p> <p>Music: DJ profiles, Listen to Bacardi MP3 player</p> <p>Bacardi Latin Party Dancer (learn to dance by following animated dance steps)</p> <p>Bacardi event calendar</p> <p>Cocktails to go—downloads for PDA</p>	Jim Beam	<p>Sports: Jim Beam racing—meet driver of Jim Beam car</p> <p>Sports: Meet the Jim Beam Bull riding team</p> <p>Music: Lynyrd Skynyrd concert tour dates</p> <p>Music: Jim Beam Live concert series. Bands are Tantric, Maroon 5, Trapt.</p> <p>Music: Preview tracks from Live concert series</p> <p>Informational videos in Jim Beam video library</p>
Bombay Sapphire	Quicktime videos	Jose Cuervo	<p>Suggestive picture of man and woman sharing lime slice in mouths</p> <p>Cuervo nation declaration of independence with lots of party language</p> <p>Variety of e-mails to be sent to friends including animated e-vites</p> <p>E-postcard images resembling Cuervo print ad campaign</p> <p>Cuervo lime sherbet recipe</p> <p>Animated island tour</p> <p>Cuervo network videos</p>
Canadian Mist	Site opens with video of scenes from nature accompanied by music; words scroll across video	Seagram’s 7	<p>Music: “Taste of Something New” campaign featuring emerging bands and artists</p> <p>Animated recipe lists, animated bubbles for Seagram’s 7 FAQs</p>
Captain Morgan	<p>Music: Captunes—Download the Captain’s MP3 player</p> <p>Morganette features: Vote for the 2003 Morganette ski team, Morganettes Archive, Morganette postcards by e-mail, Save the Morganettes game</p> <p>Halloween party—all kinds of tips for how to throw a Halloween party, including drink recipes</p> <p>Several animated features including: the Parrot Bay “Sense Booster” for the five senses, a Morganette behind-the-scenes video, a Video of a Catch the Captain event, and a “Meet the family” section that introduces different Captain Morgan products</p>	Seagram’s Gin	<p>VIPs from around the country featured in videos for “Walk of Fame”</p> <p>Scantly clothed model from model search on sign-up for e-mail updates page</p> <p>Music: Seagram’s Gin Live tour dates, features on urban music artists—Lil’ Mo recording artist</p> <p>Calendar with drink recipes and pictures of models in bikinis</p>
Crown Royal	Animated story of Crown Royal	Skyy	<p>Receive daily SKYY vodka drink of the day e-mails</p> <p>Music: Featured artists—choose music to be played on site</p> <p>Dance steps—learn to dance by following animated footprints on page</p> <p>Skyy Entertaining: recipes, cocktail etiquette, cocktail talk with quotations about drinking and vodka, party planning tips</p> <p>Skyy Entertaining: how to stock the bar, how to compile a guest list, how much alcohol to buy</p> <p>Skyy Vodka short films</p> <p>Send an e-postcard</p>
DeKuyper	<p>Scroll through DeKuyper bottles and learn about the different flavors</p> <p>Choose a color for the site based on a favorite DeKuyper flavor and the site background and images will change accordingly</p>	Tanqueray	Video featuring Tanqueray bottles before front page is loaded
Dewar’s	<p>Send an e-postcard</p> <p>Dewar’s 12 lounge presented by Playboy</p> <p>Visit Dewar’s hotspots</p> <p>Animated Dewar’s timeline</p>		
Hennessy	Animated panoramic video tours of distillery, ageing, warehouses, etc		

**Table 20: Interactive/High-Tech Features on Malternative Web Sites**

Brand	Features
Bacardi Breezer	E-postcards—"share some Bacardi Breezer spirit with your friends" Entry is animated, dialogue bubbles pop up as user moves mouse over people
Bacardi Silver	Virtual bar: Dialogue bubbles float over characters as mouse is held over them Send friends a Bacardi Silver PowerNap Send friends an aqua e-card or an 8 track e-card Bacardi Silver photo gallery "After Hours"—choose "your type of night" and Bacardi Silver tells you what to do after hours
Jack Daniel's Country Cocktails	List of amphitheaters and arenas that serve JDCCs Vote for your favorite flavor Submit a clever name or new recipe idea for a Jack Daniels' Country Cocktail Information on Jack Daniel's Lynchburg Lemonade hot air balloon
Mike's Hard Lemonade	Install Mike's Lemon Skin as image for media player Hammock swings on front page, user can use mouse to open fridge and select a flavor of Mike's products, lemon wiggles on screen as each page loads
Seagram's Wine Coolers	Phrases promoting Seagram's Wine Coolers fade in and out upon entering homepage
Sky Blue	Video cartoon of people diving as opening to site, user navigates site through bubbles that move Sky Blue Player—psychedelic visuals accompanied by music from featured artists Send e-cards with Skyy logo Music: Info on musicians/dee-jays Hughes Brothers interview on making the Skyy Blue ads
Smirnoff Ice	Animated, fast-paced video cartoon as entry to site Download buddy icons for AOL Instant Messenger Video mixers—make your own video using music and video clips, e-mail your video to friends Send a Smirnoff Ice online postcard—logo or racecars Listen to music from bands: American HiFi, Supergrass, The Soundtrack of Our Lives, Talib Kweli Finish the Spot: "The power of advertising is in your hands!"—watch latest TV commercials and then select an outcome
Zima	Animated front page with moving subway train and ticker with photos across bottom of page Music: Free Zima CD offer

**Table 21: Interactive/High-Tech Features on Wine Web Sites**

Brand	Features
Almaden	Animated entry into site
Arbor Mist	Animated dancing stick figures, animated wine blenders video
Bella Sera	Entry page has twinkling stars; front page has twinkling stars and animated text. Site also has animated videos of grape pickers, vineyards, and cantinas
Bolla	Send an e-postcard
Cavit	Introduction is animated; certain features of site move when mouse is held over them
Ecco Domani	Animation of wine being poured upon entering site
Fetzer	Animated intro to "An American Original" ad campaign
Freixenet	Animated introduction to site e-postcard gallery—mostly cartoon images, some animated
Gallo of Sonoma	Animated visit of vineyards and how wine is made
Luna di Luna	Download images of Luna di Luna wines Introduction to site is animated movie
Moet & Chandon	Animation on front page as well as informational parts of site Animated "Moet explorer" feature
Riunite	Animated "did you know" section
Rosemount Estates	Front page features moving/changing scenery with different wine bottles
Santa Margherita	e-mail postcards with cartoons
Sutter Home	Mood maker download includes sounds for computer—entire desktop application Animated rural winery scene upon entering the site Many parts of site move when mouse is held over them
Turning Leaf	Download wineglass tags with funky designs and Turning Leaf logo Multimedia wine experience with animation and sound

## VII. When Is a Cartoon a Cartoon, or Not?

The very word “cartoon” conjures up the image of children and Saturday morning television for many. However, cartoons clearly can also have adult appeal, as the famous cartoon feature of *The New Yorker* makes clear. The alcohol industry’s advertising codes permit the use of cartoons with an adult appeal. In its advertising code, the Beer Institute says, “Beer advertising and marketing materials should not employ any symbol, language, music, gesture, or cartoon character that is *intended to appeal primarily* [emphasis added] to persons below the legal purchase age.”<sup>39</sup> Similar language is found in the advertising code for the distilled spirits industry.<sup>40</sup> When a trade press article last summer described a new feature on the Budweiser Web site as using “jokey, child-like sketches ... more like the kind of cartoons normally aimed at kids and teenagers,” an Anheuser-Busch executive fired off a letter to the editor: “The point that was overlooked ... about a new Budweiser Internet ad, was that the creative technique didn’t rely on cartoon illustrations but instead used a TV storyboard pencil sketch of a ‘rejected’ ad. This ad used sophisticated, cutting-edge humor that appeals to adults and in doing so delivered a persuasive message about Budweiser beer. Any insinuation that the visual approach used created appeal for anyone other than legal-age beer drinkers is simply wrong.”<sup>41</sup>

In reviewing the 74 alcohol company Web sites, CAMY considered as a cartoon any image that appeared as if it could be drawn by hand and that resembled in style, if not in likeness, a cartoon character. CAMY also included in this categorization any computer-generated graphic image of a person, animal or object, as long as it resembled the style of a cartoon. No attempt was made to determine whether the “cartoon” or graphic was “intended to appeal primarily” to underage youth or to adults. In its 1999 review of alcohol company Web sites, the FTC used a survey form that simply noted whether “cartoon characters/similar” were present on a Web site. In CAMY’s review of the 74 Web sites, 30 were found to feature cartoons and/or graphics. Cartoons were found in some of the games, such as the characters in the Bud Light water balloon game and in the Miller Lite racing game. For Captain Morgan Rum, the cartoon-like drawing of the red mustache is part of the product’s branding and was found liberally on its Web site. So, too, Dewar’s Web site headlined its “Highlander Cartoon Ads” from a campaign in 2000 showing “the Highlander ... stylized into a cartoon character, trying his hand at surfing, rock and roll, and pulling off a daunting balancing act.”<sup>42</sup> The graphic images ranged from the urban landscape of the Smirnoff Ice site to the stylized images of the Heineken beer bottle to the figures in the virtual party on the Bacardi Silver site.

39 Beer Institute, *Beer Institute Advertising and Marketing Code* (2003). Available at <http://www.beerinstitute.org/adcode2.pdf> (cited 6 January 2004).

40 Distilled Spirits Council of the United States, *Code of Responsible Practices for Beverage Alcohol Advertising and Marketing* (2003). Available at <http://www.discus.org/industry/code/code.htm> (cited 7 January 2004).

41 Alice Z. Cuneo, “Bud uses ‘reject’ spots in viral play,” *Advertising Age* 74, no. 29 (July 21, 2003): 3; John T. Kaestner, “New Bud Internet ads target adults, not kids” *Advertising Age* 74, no. 31 (August 4, 2003): 14.

42 “Meet the Highlander: The Highlander Ads.” Available at <http://www.dewars.com/history/highlander.aspx> (cited 6 January 2004).

Figure 26: Amstel Light Beach Scene



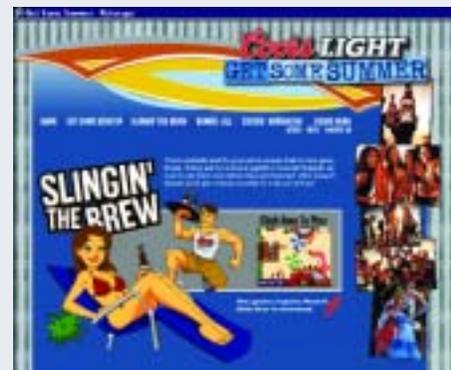
[www.amstellight.com](http://www.amstellight.com)

Figure 27: Bud Light Summer Soak 'Em Characters



[www.budlight.com](http://www.budlight.com)

Figure 28: Coors Light Slingin' the Brew Characters



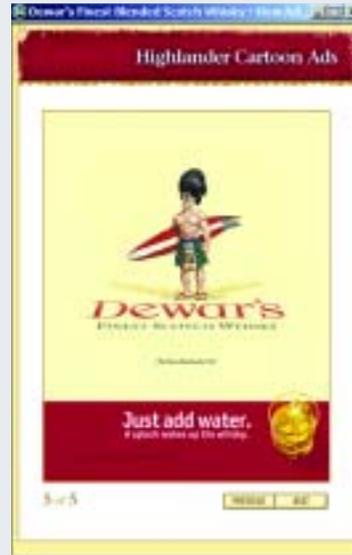
[www.coorslight.com](http://www.coorslight.com)

**Figure 29: Seagram's 7  
7-Shot Glass Shuffle Characters**



[www.seagram7.com](http://www.seagram7.com)

**Figure 30: Highlander Cartoon Ad**



[www.dewars.com](http://www.dewars.com)

**Figure 31: Skyy Cartoon Fun**



[www.skyy.com](http://www.skyy.com)

**Figure 32: Smirnoff Ice**



[www.smirnoffice.com](http://www.smirnoffice.com)

**Table 22: Cartoons and Graphics on Beer Web sites**

Brand	Features
Amstel Light	Characters holding beer or items with Amstel Light logo, characters in games and various scenes including party and beach scenes
Bud Light	Characters in Summer Soak 'Em game
Budweiser	Storyboards showing spoof "Rejected Ads"
Busch	Characters in Busch fishing challenge
Coors Light	Characters in Slingin' the Brew game, Coors Light Mountain Jam images, wallpaper, cartoons for AOL buddy icons
Corona	Computer-generated images of relaxing Corona beach settings, cartoon bottles for cartoon ice chest—fill chest with bottles to unlock "extras," Cartoon holiday images in promotional shack: Lime Jack-o-lanterns
Guinness	Characters with pints of Guinness for personality test
Heineken	Cartoon Heineken bottles appear throughout site, on screensavers
Millertime (MGD, Miller Lite, Miller High Life)	Cartoon announcers for Miller Lite Digital Football; Animé-style cars for Miller Lite racing game

**Table 23: Cartoons and Graphics on Distilled Spirits Web sites**

Brand	Features
Bacardi	AOL icons, characters in games, "Prohibition" game intro features cartoon bartender and customers
Captain Morgan	Cartoon image of Captain's mustache—roll mouse over pictures to add the Captain's mustache on faces
DeKuyper	Tropical Pineapple logo in cartoon format
Dewar's	Various cartoon ads with the Dewar's "Highlander" holding a basketball, a surfboard, and playing an electric guitar
Jack Daniel's	Build a tailgate party with cartoon people/food, etc., cartoon bottles of JD and JD Country Cocktails, cartoon fans and cartoon cheerleaders
Jose Cuervo	Invites are animated cartoons, drink recipe bottles are animated cartoons
Seagram's 7	Screensaver with cartoons 7-shot glass shuffle game with cartoon characters
Skyy	Cartoon Fun—comic-book-styled characters

**Table 24: Cartoons and Graphics on Maltalternative Web sites**

Brand	Features
Bacardi Breezer	Party conveyor characters are cartoons Ice breaker—cartoon bat images, cartoon monsters
Bacardi Silver	All characters on site are realistic-looking (virtual reality) cartoon characters with personalities/personas
Jack Daniel's Country Cocktails	Cartoons denote different parts of site: "What's shaking" is woman with ukulele
Mike's Hard Lemonade	Screensaver and wallpaper options with cartoon characters: comic-book-type wallpaper with cartoon image of bottle "blasting" forward, a lemon tree with bottles instead of fruit
Skyy Blue	Intro to the site is a video with cartoon characters
Smirnoff Ice	Cartoon characters in intro and on other pages
Two Dogs	Screensaver with actual photos of Two Dogs bulldogs in a cartoon "astronaut" suit
Zima	Cartoon character wearing headphones on front page

**Table 25: Cartoons and Graphics on Wine Web sites**

Brand	Features
Arbor Mist	Bright front page with cartoon-like colors and images
Ecco Domani	City Styles cartoon figures
Freixenet	Cartoon e-postcards and cartoon animated e-postcards
Santa Margherita	Cartoons in e-postcards
Sutter Home	Smiley face icon

## VIII. “Carding” on the Internet

---

In the spring and summer of 2003, CAMY examined the ability of leading parental control software packages, including parental controls provided by two leading Internet service providers, to block youth access to 72 Web sites marketing leading alcohol brands. In its 1999 report, the FTC noted that in 1997 and 1998, respectively, both the Beer Institute and DISCUS “modified their codes to ... offer beverage alcohol Web site addresses to operators of parental control software companies (the Spirits Code also promises to give Web site information to parents who request it).”<sup>43</sup> In addition, in its 2003 revised marketing code, DISCUS now mandates, “Age verification mechanisms should be employed for DISCUS member-controlled beverage alcohol advertising and marketing websites.”<sup>44</sup>

CAMY included the most current versions of six parental control programs (Norton Internet Security 2003, Net Nanny 5, McAfee Parental Controls,<sup>45</sup> Cyber Patrol 6, Cyber Sentinel 2.0, and Cyber Sitter 2002) in the tests. In addition, CAMY tested parental controls contained within MSN 8 and AOL 8.0, using the most current versions available at the time of testing of these two popular Internet service providers, which heavily market their parental control features. Each of the eight programs was set on the most stringent level of control that still allowed a child to surf the Internet.

MSN 8.0 had the most successful parental controls, blocking alcohol sites 99% of the time. McAfee Parental Controls was not successful in blocking any of the sites in five separate tests using different testers. Other software packages had more mixed results. The fact that MSN 8.0 blocked nearly all the sites demonstrates that it is technologically possible to remove youth access to alcohol sites.

Another way to look at the results of these tests is to see which alcohol sites were successfully blocked by the screening processes of the parental software tools. Seventy-six percent of alcohol brands eluded parental controls half the time or more. Three of the four brands with sites least likely to be blocked were malternatives: Bacardi Breezer, Bacardi Silver, and Doc’s Hard Lemon.

---

43 Federal Trade Commission, *Self-Regulation in the Alcohol Industry*, 7.

44 Distilled Spirits Council of the United States, “Responsible Content: Websites,” in *Code of Responsible Practices*.

45 Both McAfee Internet Security and McAfee Parental Controls appeared in the NPD list of 2002 parental control software programs. McAfee Internet Security was not included in the software tests after a phone call to the publishers confirmed that McAfee Internet Security includes McAfee Parental Controls as one feature among others in the software package; of the two, the stand-alone McAfee Parental Controls was selected because it most specifically met the needs of the software tests.

**Table 26: Ability of Parental Controls to Block Alcohol Sites, By Brand**

Brand Site	Number of Programs Blocking	% of Programs Blocking	Brand Site	Number of Programs Blocking	% of Programs Blocking
Bacardi Breezer	1	12.5%	Sutter Home	4	50%
Bacardi Silver	1	12.5%	Woodbridge	4	50%
Doc's Hard Lemon	1	12.5%	Turning Leaf Vineyards	4	50%
Miller Genuine Draft	1	12.5%	Concha y Toro	4	50%
Inglenook	2	25%	Clos du Bois	4	50%
Almaden	2	25%	Canadian Mist	4	50%
Amstel Light	2	25%	Beringer	4	50%
Corbett Canyon	2	25%	Cavit	4	50%
DeKuyper	2	25%	Heineken	4	50%
Gallo of Sonoma	2	25%	Freixenet	4	50%
Hooper's Hooch	2	25%	Santa Margherita	4	50%
Zima	2	25%	Sam Adams Light	4	50%
Luna di Luna	2	25%	Fetzer	4	50%
Seagram's 7 Crown	2	25%	Guinness Stout	4	50%
Seagram's Wine Coolers	2	25%	Korbel Champagne	4	50%
Sky Blue	2	25%	Labatt	4	50%
Mike's Hard Lemonade	3	37.5%	Livingston Cellars	4	50%
Crown Royal	3	37.5%	Kendall-Jackson	4	50%
Coors Light	3	37.5%	Smirnoff Ice	4	50%
Jack Daniel's Country Cocktails	3	37.5%	Baileys	5	62.5%
Bombay Sapphire	3	37.5%	Busch	5	62.5%
Bolla	3	37.5%	Bacardi	5	62.5%
Ecco Domani	3	37.5%	Michelob	5	62.5%
Bartles & Jaymes Wine Coolers	3	37.5%	Jose Cuervo	5	62.5%
Twin Valley	3	37.5%	Budweiser	5	62.5%
Two Dogs	3	37.5%	Jack Daniel's	5	62.5%
Riunite	3	37.5%	Jim Beam	5	62.5%
Miller Lite	3	37.5%	Smirnoff	5	62.5%
Moet & Chandon	3	37.5%	Absolut	5	62.5%
Old Milwaukee	3	37.5%	Hennessy	5	62.5%
Arbor Mist	3	37.5%	Corona Extra	5	62.5%
Redwood Creek	3	37.5%	Tanqueray	5	62.5%
Miller High Life	3	37.5%	Dewar's	5	62.5%
Bella Sera	3	37.5%	Stolichnaya	5	62.5%
Rolling Rock	3	37.5%	Sky Vodka	6	75%
Yuengling Lager	4	50%	Bud Light	6	75%

## IX. Conclusion

---

In 2002, the alcohol industry spent a reported \$21.6 million on 50,089 banner ads, more than double the industry's spending for this medium in 2001.<sup>46</sup> These are the ads designed to drive users to the companies' branded sites. This growth in spending on banner ads attests to the alcohol industry's growing presence on the Web. Thus, the issues of alcohol Web sites' appeal and ease of access for underage youth, first raised by CME in 1997, may be even greater today.

Much of the sites' content—games similar to those found in video arcades and the latest in interactive, Web-based technology—may still have substantial appeal to underage youth. In addition, features such as screensavers, wallpapers, and viral marketing through e-mails raise the possibility that the alcohol Web sites create a virtual “trinkets and trash” phenomenon, similar to past tobacco marketing practices with baseball hats, t-shirts and other teen gear. Access to alcohol sites continues to be a matter of self-regulation by the computer user. From the Web site visitation data included in this report it is clear that underage persons are not deterred by this approach. The filtering technology that may enable parents and other adults to provide oversight is uneven at best in its effectiveness, raising questions about the real impact of industry marketing codes that offer those filters as a helpful tool for parents.

In short, the alcohol industry's Web presence remains largely a potential playground for underage youth with little if any adult supervision. CAMY's findings underline the importance of the recommendations by the National Research Council/Institute of Medicine (NRC/IOM) in its landmark report published in September 2003. The NRC/IOM called on the Department of Health and Human Services to monitor the advertising and marketing practices of the alcohol industry and to report its findings periodically to the Congress and the public. In making that recommendation, the NRC/IOM called it a step toward “strengthening industry self-regulation and promoting corporate responsibility.”<sup>47</sup> The need for increased accountability and responsibility on the Internet is as clear today as it was seven years ago in 1997 when CME issued its initial warnings about alcohol Web sites and their appeal to underage youth.

---

<sup>46</sup> Evaliant Services 2003, a division of TNS Media Intelligence/CMR. Report generated 12 January 2004.

<sup>47</sup> National Research Council and Institute of Medicine, *Reducing Underage Drinking: A Collective Responsibility*, Richard J. Bonnie and Mary Ellen O'Connell, eds (Washington, DC: The National Academies Press, 2003), 137-8.

# X. Appendices

---

# APPENDIX A: METHODOLOGY

## Selection of Alcohol Brands and Sites

CAMY selected all alcohol product brands for beer, maltalternatives, distilled spirits and wine that met one or more of the following criteria:

- had \$15,000 or more in Internet advertising spending in 2002,<sup>48</sup>
- was listed among the top 20 for each beverage category for total advertising spending, 2002,<sup>49</sup> or
- was listed among the top 20 for each beverage category for leading domestic/international brands in terms of total U.S. shipments.<sup>50</sup>

From these, CAMY removed brands that were reported as being phased out (Stolichnaya Citrona Malt Beverage, Captain Morgan Gold Malt Beverage, Vibe Malt Beverage, Sauza Diablo Malt Beverage), and then searched for Web sites for those that remained, using Google.com and MSN.com. If the brand Web site did not appear within the first two search results pages of either, no Web site for the brand was included in the tests. Home pages for the brands were used for all of the sites. Eighty brand Web sites were included in the testing list before testing procedures were initiated.

Of the eighty Web sites, results for six sites for the content review procedure and eight sites for the access tests were eliminated from the study to address five types of discrepancies found during the testing procedures:

- Web site construction during both the content review and the access tests,
- Web site malfunction during the access tests,
- the wrong Web address listed for a brand, affecting both the content review and the access tests,
- the discovery of multiple Web addresses leading to the same Web site during the content review, and
- the discovery that one wine brand had been listed under two brand names in the resource used for total advertising spending and therefore erroneously had been assigned two Web addresses (one corporate, one brand-specific) for the content review and access tests.

Because of these discrepancies,

- The Web site for Foster's Beer was eliminated from both the content review and access tests because its home page was under construction.
- The Web site for Seagram's Gin was eliminated from the access tests because its home page listed it as under construction. (This notice was not on the home page during the content review, so it was not eliminated from the review.)
- Captain Morgan Rum, Captain Morgan Spiced Rum, Lindemans Wine, and Rosemount Estate Wine were eliminated from the access tests because they were consistently down (defined as inaccessible a majority of the times access was attempted with any one of the software packages) during the access testing procedure.
- The Web site that had been found for Coors Original, www.coors.com, was removed from the content review and access tests because it was the Coors Brewing Company corporate site, and not a product site for the brand.
- The three Miller beer brand sites, www.mgd.com (Miller Genuine Draft), www.millerhighlife.com (Miller High Life), and www.millerlite.com (Miller Lite) were included as one site, Millertime, for the content review results. Because these original three Miller beer brand sites all had individual, valid Web addresses (a user could type in each brand-specific Web address or click on a link to it and reach a home page), they had been tested as three separate brand sites during the access tests. However, all three Web addresses led to the same Millertime Web site, which included all three brands but did not change content based on which of the three Web addresses the user had used. Therefore, Millertime replaced the three individual Miller beer brand sites in the content review to avoid reporting the exact same content three times.
- The site found during a search for Captain Morgan Spiced Rum, www.rum.com, was similarly eliminated from the content review to avoid reporting the exact same content twice since www.captainmorgan.com (Captain Morgan Rum) and www.rum.com were individual, valid Web addresses but led to the same Captain Morgan Web site.
- Finally, the Web site www.gallo.com was eliminated from both the access tests and the content review because, although the resource used to find the top 20 wine brands for total advertising spending had listed "Gallo Wine" and "Gallo of Sonoma," "Gallo Wine" did not exist in E&J Gallo's product portfolio.<sup>51</sup>

48 Evaliant; does not include corporate or non-specific product or service advertising for parent companies.

49 TNS Media Intelligence/CMR, 2002; product advertising only.

50 Adams Beverage Group. Maltalternatives and beer measured in 2.25 gallon cases; table wine and distilled spirits measured in 9-liter cases. Based on availability of data, shipment figures covered 2000-2002 for beer, maltalternatives, and wine; 2001-2002 for distilled spirits.

51 "The 'Gallo' Family of Wines." Available at <http://jobs.gallo.com/Portfolio/GalloFamily.asp> (cited 8 January 2004).

The final population surveyed for the content review was thus comprised of 74 sites: 15 beer sites, 19 distilled spirits sites, 12 maltalternative sites, and 28 wine sites. The final population surveyed for the access tests was comprised of 72 sites: 17 beer sites, 17 distilled spirits sites, 12 maltalternative sites, and 26 wine sites.

## Testing of Parental Control Software

CAMY contracted with a leading market research firm, The NPD Group, for a list of parental control software programs sold in 2002, along with estimates for the number of units sold and sales figures in dollars in 2002 for each program. CAMY then researched each program individually and selected all programs that could still be confirmed to be in production and that operated by filtering or blocking Web sites and not solely by monitoring children's Internet activity. All parental control software programs were tested by CAMY staff as well as by parent volunteers in seven states and the District of Columbia. Parent volunteers included Mrs. Hope Taft, the First Lady of Ohio, and Mrs. Mary Easley, First Lady of North Carolina. For all volunteer testers, a CAMY staff person first set up the software on the tester's computer and then monitored the testing process to ensure uniformity.

## comScore Networks Methodology

The comScore Global Network is the largest consumer panel of its kind, comprised of more than 1.5 million global Internet users, approximately two-thirds of which are in the United States. From this massive panel, comScore delivers the most comprehensive view available of consumer activity—both online and offline.

comScore has developed a statistical methodology to ensure the accuracy and reliability of projections to the total population based on its network. At the heart of the comScore Global Network is a sample of consumers enlisted via Random Digit Dial (RDD) and other recruitment methodologies long endorsed by many market and media researchers. In addition, comScore employs broad random online recruitment programs, which have been time-tested through the years in which the comScore Global Network has been in operation and address the shortcomings of telephone recruitment due to "Do-Not-Call" legislation and the increasing incidence of cellular devices as primary phone lines.

Participants are protected by industry-leading privacy policies that ensure anonymity of personal information. comScore systems and

processes undergo intensive, ongoing audits via the Ernst & Young CyberProcess Certification program. comScore only reports data describing the behavior and attitudes of aggregate consumer segments, and does not release personally identifiable information about any panelist.

comScore's membership agreement requires that all persons registering for the comScore Global Network be at least 18 years old. If a household has children under the age of 18, only the parent or legal guardian may register for the comScore Global Network; however, all household Internet behavior then may be used in developing the statistical reports for the comScore service. comScore complies with all applicable U.S. data gathering rules, including the Children's Online Privacy Protection Act (COPPA).

All demographic segments of the online population are represented in the comScore Global Network, with large samples of participants in each segment. comScore determines the size and characteristics of the total online population via a continuous enumeration survey spanning tens of thousands of persons over the course of a year. The sample of participants in this enumeration survey is selected via RDD methodology. Respondents are asked a variety of questions about their Internet use, as well as descriptive information about themselves and their households. The result is an accurate and up-to-date picture of the universe to which the comScore sample is projected.

The resulting combination of large samples across all segments, and a reliable view of the total universe, allows comScore to eliminate the effects of over- or under-representation of any group in the network. It further enables the analysis of activity within low-incidence populations and at smaller online entities.

comScore technology passively and unobtrusively routes each participant's Internet connection through comScore's server network, without requiring any further action on the part of the individual. The technology enables comScore to collect the details of communication to and from each individual's computer, such as sites visited and products purchased.

Data for the *Clicking with Kids: Alcohol Marketing and Youth on the Internet* report are based on comScore's Media Matrix XPC (eXPanded Coverage) audience measurement system, which is founded upon the behavior of approximately 1.1 million U.S. panelists within the comScore Global Network.

## APPENDIX B: WEB SITES USED FOR CONTENT REVIEW AND ACCESS TESTS

Brand	Web Site	Category	Used for Content Review	Used for Access Tests
Amstel Light	www.amstellight.com	Beer	✓	✓
Bud Light	www.budlight.com	Beer	✓	✓
Budweiser	www.budweiser.com	Beer	✓	✓
Busch	www.busch.com	Beer	✓	✓
Coors Light	www.coorslight.com	Beer	✓	✓
Corona	www.corona.com	Beer	✓	✓
Guinness	www.guinness.com	Beer	✓	✓
Heineken	www.heineken.com/usa/	Beer	✓	✓
Labatt	www.labatt.com	Beer	✓	✓
Michelob	www.michelob.com	Beer	✓	✓
Miller Genuine Draft	www.mgd.com	Beer	As Millertime	✓
Miller High Life	www.millerhighlife.com	Beer	As Millertime	✓
Miller Lite	www.millerlite.com	Beer	As Millertime	✓
Old Milwaukee	www.oldmilwaukee.com	Beer	✓	✓
Rolling Rock	www.rollingrock.com	Beer	✓	✓
Sam Adams Light	www.samadamslight.com	Beer	✓	✓
Yuengling	www.yuengling.com	Beer	✓	✓
Absolut	www.absolut.com	Distilled Spirit	✓	✓
Bacardi	www.bacardi.com	Distilled Spirit	✓	✓
Baileys	www.baileys.com	Distilled Spirit	✓	✓
Bombay Sapphire	www.bombaysapphire.com	Distilled Spirit	✓	✓
Canadian Mist	www.canadianmist.com	Distilled Spirit	✓	✓
Captain Morgan	www.captainmorgan.com	Distilled Spirit	✓	—
Crown Royal	www.crownroyal.com	Distilled Spirit	✓	✓
DeKuyper	www.dekuyper.com	Distilled Spirit	✓	✓
Dewar's	www.dewars.com	Distilled Spirit	✓	✓
Hennessy	www.hennessy-cognac.com	Distilled Spirit	✓	✓
Jack Daniel's	www.jackdaniels.com	Distilled Spirit	✓	✓
Jim Beam	www.jimbeam.com	Distilled Spirit	✓	✓
Jose Cuervo	www.cuervo.com	Distilled Spirit	✓	✓
Seagram's 7	www.seagram7.com	Distilled Spirit	✓	✓
Seagram's Gin	www.seagramginlive.com	Distilled Spirit	✓	—
Skyy	www.skyy.com	Distilled Spirit	✓	✓
Smirnoff	www.smirnoff.com	Distilled Spirit	✓	✓
Stolichnaya	www.stoli.com	Distilled Spirit	✓	✓
Tanqueray	www.tanqueray.com	Distilled Spirit	✓	✓
Bacardi Breezer	www.bacardibreezer.com	Malternative	✓	✓
Bacardi Silver	www.bacardisilver.com	Malternative	✓	✓

Brand	Web Site	Category	Used for Content Review	Used for Access Tests
Bartles & Jaymes	www.bartlesandjaymes.com	Malternative	√	√
Doc Otis Hard Lemon	www.docshardlemon.com	Malternative	√	√
Hooper's Hooch	www.hoopershooch.com	Malternative	√	√
Jack Daniel's Country Cocktails	www.countrycocktails.com	Malternative	√	√
Mike's Hard Lemonade	www.mikeshardlemonade.com	Malternative	√	√
Seagram's Wine Coolers	www.seagrams-coolers.com	Malternative	√	√
Sky Blue	www.skyblue.com	Malternative	√	√
Smirnoff Ice	www.smirnoffice.com	Malternative	√	√
Two Dogs	www.twodogs.com	Malternative	√	√
Zima	www.zima.com	Malternative	√	√
Almaden	www.almaden.com	Wine	√	√
Arbor Mist	www.arbormist.com	Wine	√	√
Bella Sera	www.bellaserawine.com	Wine	√	√
Beringer	www.beringer.com	Wine	√	√
Bolla	www.bolla.com	Wine	√	√
Cavit	www.cavit.it/ing/welcome.asp	Wine	√	√
Clos du Bois	www.closdubois.com	Wine	√	√
Concha y Toro	www.conchaytoro.com	Wine	√	√
Corbett Canyon	www.members.aol.com/SLOwineries/corbett.html	Wine	√	√
Ecco Domani	www.style.com/eccodomani	Wine	√	√
Fetzer	www.fetzer.com	Wine	√	√
Freixenet	www.freixenet.es/index2.htm	Wine	√	√
Gallo of Sonoma	www.galloofsonoma.com	Wine	√	√
Inglenook	www.inglenook.com	Wine	√	√
Kendall-Jackson	www.kj.com/index.html	Wine	√	√
Korbel Champagne	www.korbel.com	Wine	√	√
Lindemans	www.lindemans.com	Wine	√	—
Livingston Cellars	www.livingstoncellars.com	Wine	√	√
Luna di Luna	www.lunadiluna.com	Wine	√	√
Moet & Chandon	www.moet.com/prehome/prehome.asp	Wine	√	√
Redwood Creek	www.redwoodcreekwine.com	Wine	√	√
Riunite	www.riunite.com	Wine	√	√
Rosemount Estate	www.rosemountestates.com	Wine	√	—
Santa Margherita	www.santamargherita.com	Wine	√	√
Sutter Home	www.sutterhome.com	Wine	√	√
Turning Leaf Vineyards	www.turningleaf.com	Wine	√	√
Twin Valley	www.ejgtwinvalley.com	Wine	√	√
Woodbridge	www.woodbridgewines.com	Wine	√	√

## APPENDIX C: WEB SITES USED FOR YOUTH VISIT ANALYSIS

Web Site	Category	Web Site	Category
amstellight.com	Beer	seagram7.com	Distilled Spirit
budlight.com	Beer	seagramsginlive.com	Distilled Spirit
budweiser.com	Beer	skyy.com	Distilled Spirit
busch.com	Beer	smirnoff.com	Distilled Spirit
coorslight.com	Beer	stoli.com	Distilled Spirit
corona.com	Beer	tanqueray.com	Distilled Spirit
guinness.com	Beer	bacardisilver.com	Malternative
heineken.com	Beer	countrycocktails.com	Malternative
labatt.com	Beer	mikeshardlemonade.com	Malternative
michelob.com	Beer	skyyblue.com	Malternative
millerhighlife.com	Beer	smirnoffice.com	Malternative
millertime.com	Beer	zima.com	Malternative
oldmilwaukee.com	Beer	arbormist.com	Wine
rollingrock.com	Beer	beringer.com	Wine
samadamslight.com	Beer	bolla.com	Wine
yuengling.com	Beer	clisdubois.com	Wine
absolut.com	Distilled Spirit	conchaytoro.com	Wine
bacardi.com	Distilled Spirit	fetzer.com	Wine
baileys.com	Distilled Spirit	galloofsonoma.com	Wine
bombaysapphire.com	Distilled Spirit	kj.com	Wine
captainmorgan.com	Distilled Spirit	korbel.com	Wine
crownroyal.com	Distilled Spirit	moet.com	Wine
cuervo.com	Distilled Spirit	riunite.com	Wine
dekuyper.com	Distilled Spirit	santamargherita.com	Wine
dewars.com	Distilled Spirit	sutterhome.com	Wine
hennessy-cognac.com	Distilled Spirit	turningleaf.com	Wine
jackdaniels.com	Distilled Spirit	woodbridgewines.com	Wine
jimbeam.com	Distilled Spirit		

