

YOUTH EXPOSURE TO ALCOHOL ADVERTISING ON TELEVISION, 2001-2009

Executive Summary

Youth* exposure to alcohol advertising on U.S. television increased 71 percent between 2001 and 2009, more than the exposure of either adults ages 21 and above or young adults ages 21 to 34, according to an analysis from the Center on Alcohol Marketing and Youth (CAMY) at the Johns Hopkins Bloomberg School of Public Health.

Driving this increase was the rise of distilled spirits advertising on cable television. Youth exposure to all distilled spirits TV advertising was more than 30 times greater in 2009 than in 2001, with significant growth occurring in distilled spirits ads on cable. By 2009, the majority of youth exposure to advertising for all alcoholic beverages on cable was occurring during programming that youth ages 12 to 20 were more likely to be watching than adults 21 and above.†‡

Under pressure from the Federal Trade Commission to reduce youth exposure to alcohol marketing, in 2003 trade associations representing beer and distilled spirits companies joined wine marketers in committing to advertise only when the underage audience composition is less than 30 percent. This threshold has been ineffective in reducing youth exposure on television, either in absolute or in relative terms.

Using as the comparison 2004 (the first full calendar year after beer and distilled spirits adopted the 30 percent threshold), data show that by 2009 youth exposure to alcohol advertising on television had grown by a greater percentage than that of young adults ages 21 to 34 or adults ages 21 and above.

Moreover, industry compliance with the 30 percent threshold remained uneven. In 2009, 7.5 percent of all alcohol product ad placements (23,718 ads) and 9 percent of all alcohol product ad placements on cable (16,283 ads) were on programming with underage audiences greater than 30 percent.

CAMY commissioned Virtual Media Resources to analyze nearly 2.7 million product advertisements placed by alcohol companies from 2001 to 2009, purchased at an estimated cost of more than \$8 billion. Key findings include:

* In this report, unless otherwise noted, youth are defined as persons ages 12 to 20, and adults are defined as persons ages 21 and over.

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‡ Youth exposure and overexposure (as well as “more likely to be viewed by” and other comparisons of youth and adult exposure to alcohol advertising in this report) are based on “gross rating points,” which measure how much an audience segment is exposed to advertising per capita. Another way of measuring advertising exposure is “gross impressions” (the total number of times all members of a given audience are exposed to advertising). The adult population will almost always receive far more gross impressions than youth because there are far more adults in the population than youth. To calculate gross rating points, one divides gross impressions by the relevant population (e.g., persons ages 21 and over) and multiplies by 100, resulting in a more comparable per capita measurement. See Appendix C for a glossary of terms.

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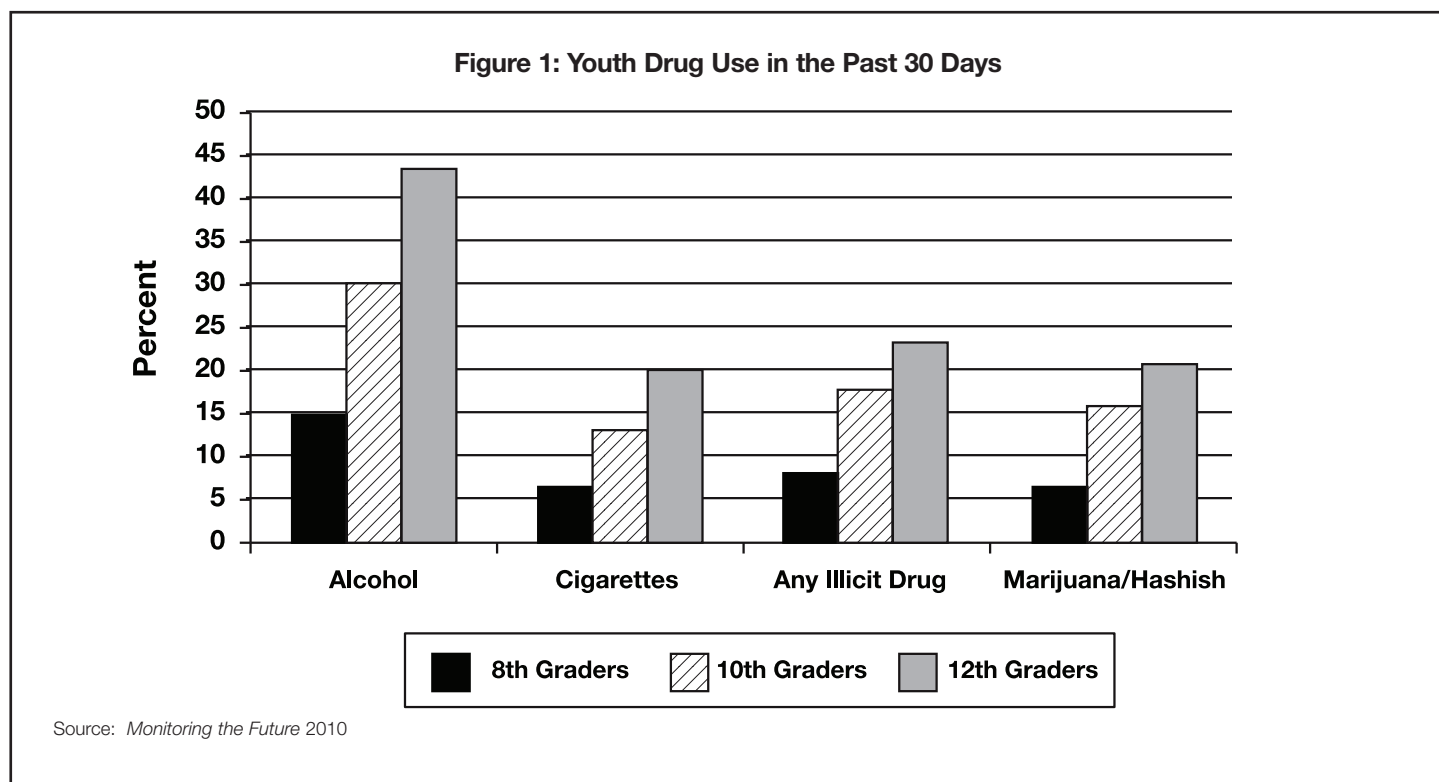
December 15, 2010
Revised July 23, 2012

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- The average annual number of alcohol ads seen by youth watching television increased from 217 in 2001 to 366 in 2009, approximately one alcohol ad per day.
- In 2009, 13 percent of youth exposure came from advertising placed above the industry's voluntary 30 percent threshold.
- Also in 2009, 44 percent of youth exposure came from advertising that overexposed youth (i.e., was more likely to be seen per capita by youth ages 12 to 20 than by adults ages 21 and above) compared to persons of legal purchase age (21 and above).
- On cable television, the majority of youth exposure came from advertising more likely to be seen by youth per capita than by adults ages 21 and above.
- From 2004, the first full year after the distilled spirits and beer industries joined the wine industry in implementing a 30 percent standard to protect against youth exposure, to 2009, youth exposure to distilled spirits ads on cable television doubled.
- In 2009, five cable networks were more likely to expose youth per capita to alcohol advertising than adults 21 and above: Comedy Central, BET, E!, FX and Spike. Two of these—Comedy Central and BET—delivered more exposure to youth than to young adults ages 21-34.
- In 2009, 12 brands (8 percent) generated half of youth overexposure: Miller Lite, Coors Light, Captain Morgan Rums, Bud Light, Samuel Adams Boston Lager, Miller Genuine Draft Light Beer, Crown Royal Whiskey, Corona Extra Beer, Disaronno Originale Amaretto, Smirnoff Vodkas, Miller Chill and Labatt Blue Light Beer.
- From 2001 to 2009, youth were 22 times more likely to see an alcohol product ad than an alcohol company-sponsored “responsibility”[§] ad whose primary message warned against underage drinking and/or alcohol-impaired driving.

Background

Alcohol is the leading drug problem among youth¹ and is responsible for at least 4,600 deaths per year among persons under 21.² In 2009, 10.4 million (27.5 percent) young people in the U.S., ages 12 to 20, reported drinking in the past month, and 6.9 million (18.1 percent) reported binge drinking (defined as five or more drinks at one sitting, usually within two hours).³ Binge drinkers account for more than 90 percent of the alcohol consumed by this age group.⁴



[§] For the purposes of this report, “responsibility” advertisements had as their primary focus a message about drinking responsibly, avoiding drinking and driving, or discouraging underage drinking.

Every day in the U.S., 4,750 young people under age 16 have their first full drink of alcohol.⁵ This is a problem because the earlier young people start drinking, the more likely they are to suffer alcohol-related health and social problems later in life. Compared to those who wait until they are 21 to drink, young people who start drinking before age 15 are four times more likely to become alcohol dependent,⁶ seven times more likely to be in a motor vehicle crash because of drinking⁷ and 11 times more likely to be in a physical fight after drinking.⁸

Exposure to alcohol advertising and marketing increases the likelihood that young people will start drinking, or that they will drink more if they are already consuming alcohol.⁹ A wide range of studies has established the association between exposure to alcohol marketing and youth drinking behavior, even after controlling for a variety of variables such as parental monitoring or socioeconomic status.¹⁰⁻¹⁶

Alcohol industry spokespeople have stated that they observe a proportional standard when placing their advertising to ensure that young people are not overexposed.¹⁷ Since 2003, industry-wide voluntary codes of good marketing practice have directed that alcohol advertisers avoid programming where underage audiences exceed 30 percent. However, the National Research Council and Institute of Medicine,¹⁸ as well as 20 state attorneys general,¹⁹ have suggested that a 15 percent standard, roughly proportionate to the percentage of the population between the ages of 12 and 20, would be more appropriate. In 2007, one company, Beam Global Spirits & Wine Inc., moved to a 25 percent standard, combined with a 15 percent annual aggregate average by brand and by medium. CAMY has estimated that, if adopted by the entire industry, this standard would reduce youth exposure to alcohol advertising on television by 14 percent and in magazines by more than 10 percent.²⁰

Acknowledgments

Preparation of this report was supported by Cooperative Agreement 5U58DP002027-02 from the Centers for Disease Control and Prevention. Its contents are solely the responsibility of the authors and do not represent the official views of the Centers for Disease Control and Prevention.

CAMY would like to thank the following researchers for their independent review of this report. The opinions expressed in this report are those of the authors and do not necessarily reflect those of the reviewers.

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I. Total Alcohol Advertising and Youth Exposure to Alcohol Advertising on Television, 2001-2009

A. Total Alcohol Advertising

Over nine years, from 2001 to 2009, alcohol companies spent more than \$8.2 billion to place 2,664,919 alcohol product advertisements on U.S. television. The number of advertisements on broadcast television networks stayed fairly consistent; advertisements on broadcast spot (local broadcast) declined, while advertisements placed on cable TV networks more than tripled (Table 1).

Table 1: Alcohol Product Advertising on U.S. Television by Placement, 2001 to 2009

Year	Total TV		Broadcast Network TV		Cable Network TV		Broadcast Spot TV	
	Ads	Dollars	Ads	Dollars	Ads	Dollars	Ads	Dollars
2001	225,615	\$779,110,078	5,018	\$483,226,280	51,019	\$156,796,827	169,578	\$139,086,971
2002	299,356	\$997,185,610	6,231	\$600,572,725	80,633	\$214,888,169	212,492	\$181,724,716
2003	286,929	\$890,836,725	4,950	\$486,485,051	81,101	\$232,709,300	200,878	\$171,642,374
2004	285,757	\$987,227,322	6,174	\$528,075,400	115,384	\$330,460,655	164,199	\$128,691,267
2005	294,992	\$1,028,506,956	5,641	\$471,653,390	142,912	\$437,296,859	146,439	\$119,556,707
2006	299,475	\$992,175,810	4,328	\$452,391,732	140,977	\$367,732,112	154,170	\$172,051,966
2007	340,377	\$796,996,673	4,015	\$415,299,661	168,292	\$267,547,066	168,070	\$114,149,946
2008	316,837	\$824,559,390	3,688	\$431,698,608	178,047	\$290,675,932	135,102	\$102,184,850
2009	315,581	\$955,744,782	4,916	\$468,101,954	179,939	\$389,014,652	130,726	\$98,628,176
Total	2,664,919	\$8,252,343,346	44,961	\$4,337,504,801	1,138,304	\$2,687,121,572	1,481,654	\$1,227,716,973
% Change								
2001-2009	39.9%	22.7%	-2.0%	-3.1%	252.7%	148.1%	-22.9%	-29.1%

Source: The Nielsen Company, 2001-2009

Distilled spirits companies increased their advertising on cable most dramatically over this period; however, in terms of number of advertisements, beer companies increased their advertising and accounted for the most alcohol advertising on cable, while wine advertising on cable actually declined (Table 2).

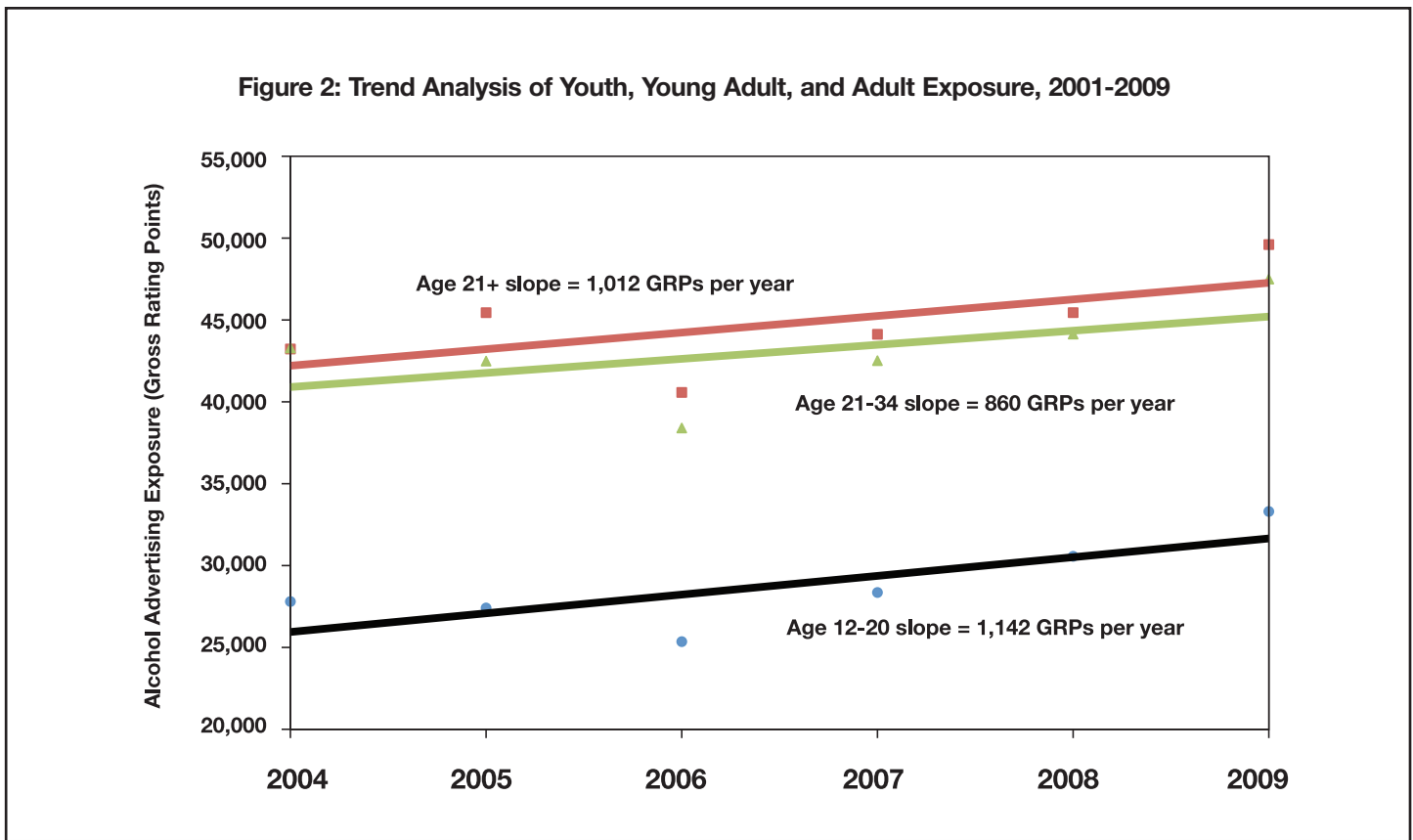
Table 2: Alcohol Product Advertising on Cable Television by Alcohol Type, 2001 to 2009

Year	Total Cable Ads		Beer and Ale		Distilled Spirits		Alcopops		Wine	
	Ads	Dollars	Ads	Dollars	Ads	Dollars	Ads	Dollars	Ads	Dollars
2001	51,019	\$156,796,827	36,834	\$122,064,382	1,973	\$5,186,178	3,046	\$11,517,209	9,166	\$18,029,058
2002	80,633	\$214,888,169	42,182	\$118,490,242	5,054	\$13,851,156	13,738	\$39,393,783	19,659	\$43,152,988
2003	81,101	\$232,709,300	46,128	\$158,000,246	19,396	\$33,853,439	6,381	\$19,918,026	9,196	\$20,937,589
2004	115,384	\$330,460,655	67,384	\$232,665,261	33,738	\$66,829,863	6,043	\$16,975,936	8,219	\$13,989,595
2005	142,912	\$437,296,859	81,461	\$277,423,543	44,752	\$119,138,598	6,928	\$22,402,147	9,771	\$18,332,571
2006	140,977	\$367,732,112	65,784	\$190,273,262	59,526	\$139,745,230	6,506	\$21,955,537	9,161	\$15,758,083
2007	168,292	\$267,547,066	90,620	\$166,241,222	62,769	\$85,906,849	4,335	\$4,563,984	10,568	\$10,835,011
2008	178,047	\$290,675,932	99,236	\$181,836,299	61,201	\$82,295,310	8,135	\$12,857,183	9,475	\$13,687,140
2009	179,939	\$389,014,652	104,369	\$241,754,057	62,701	\$121,404,157	7,420	\$17,190,223	5,449	\$8,666,215
Total	1,138,304	\$2,687,121,572	633,998	\$1,688,748,514	351,110	\$668,210,780	62,532	\$166,774,028	90,664	\$163,388,250
% Change										
2001-2009	252.7%	148.1%	183.3%	98.1%	3078.0%	2240.9%	143.6%	49.3%	-40.6%	-51.9%

Source: The Nielsen Company, 2001-2009

B. Youth Exposure to Alcohol Advertising

Concomitant with this increase in cable advertising, youth exposure to alcohol product advertising grew more rapidly than either adult or young adult exposure. While estimates of levels of exposure at single points in time can be misleading, trend analysis (Figure 2, using linear regression) can assess the six years of data following the industry's adoption of a 30 percent standard. From 2004 to 2009, youth exposure to alcohol advertising grew at an average of 1,142 gross rating points (GRPs)^{§§} per year (Figure 2). In contrast, exposure of young adults ages 21 to 34, the group often identified by the industry as its primary target, grew by 860 GRPs per year, while average exposure among all adults ages 21 and above increased by an average of 1,012 GRPs per year.



The outcome of this growth was a huge increase in the average number of alcohol advertisements seen by youth. In 2001, 90 percent of young people ages 12 to 20 were exposed to TV advertising for alcohol, and they saw an average of 217 total alcohol commercials on TV; by 2009, this had increased to 91 percent seeing an average of 366 total alcohol advertisements on TV (Table 3). As a result, the total number of GRPs for alcohol advertising on TV among 12- to 20-year-olds increased 71 percent, from 19,502 in 2001 to 33,305 in 2009. This increase was entirely due to the approximately one-third increase in TV GRPs for beer and ale advertising in this age group and the almost 30-fold increase in TV GRPs for distilled spirits advertising in this age group during this time period.

^{§§} See Appendix C for definitions of terminology used in this report.

Table 3: Reach and Frequency of Alcohol Product Advertising on Television by Alcohol Type and Age Group, 2001 to 2009

Ages 12-20															
Year	Beer and Ale			Distilled Spirits			Alcopops			Wine			Total		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
2001	89%	181.5	16,215	58%	5.6	324	85%	18.9	1,606	85%	15.9	1,356	90%	216.5	19,502
2002	90%	198.4	17,820	67%	11.0	742	88%	59.4	5,232	84%	20.0	1,688	90%	282.6	25,482
2003	90%	201.7	18,112	70%	34.3	2,398	84%	25.6	2,146	74%	9.8	726	90%	260.8	23,381
2004	90%	231.0	20,746	73%	67.2	4,884	80%	16.6	1,332	78%	10.8	841	90%	309.0	27,803
2005	91%	190.4	17,285	83%	92.5	7,640	83%	18.6	1,543	80%	11.8	942	91%	300.8	27,410
2006	89%	154.3	13,731	77%	120.2	9,259	75%	20.1	1,505	78%	11.0	858	89%	284.9	25,353
2007	91%	190.6	17,264	82%	109.8	9,031	81%	12.1	974	82%	13.3	1,087	91%	311.0	28,355
2008	90%	209.0	18,805	84%	109.9	9,230	75%	19.2	1,442	80%	13.6	1,090	91%	335.9	30,567
2009	90%	237.8	21,402	87%	113.5	9,874	80%	17.9	1,430	75%	8.0	598	91%	366.0	33,304
% Change 2001-2009		32.0%				2,945.9%			-11.0%			-55.9%			70.8%
Ages 21-34															
Year	Beer and Ale			Distilled Spirits			Alcopops			Wine			Total		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
2001	94%	269.4	25,294	71%	6.7	473	90%	25.9	2,332	91%	28.5	2,586	94%	325.6	30,685
2002	94%	292.9	27,542	77%	14.0	1,077	92%	85.4	7,899	88%	35.2	3,111	94%	419.6	39,630
2003	94%	299.9	28,211	77%	45.8	3,527	89%	34.0	3,042	83%	16.2	1,343	94%	383.3	36,122
2004	94%	355.6	33,429	79%	81.6	6,471	86%	23.8	2,036	84%	16.1	1,353	94%	459.4	43,290
2005	92%	311.7	28,760	84%	119.1	9,967	85%	25.3	2,155	85%	19.0	1,606	93%	458.6	42,488
2006	93%	239.8	22,297	82%	325.4	12,651	80%	24.8	1,981	84%	17.5	1,474	93%	412.9	38,403
2007	92%	289.3	26,687	84%	150.2	12,545	83%	16.4	1,360	86%	22.3	1,922	93%	458.6	42,515
2008	92%	305.9	28,140	85%	143.6	12,208	75%	24.2	1,818	84%	23.5	1,972	92%	479.8	44,139
2009	92%	343.4	31,590	88%	146.8	12,913	83%	24.1	1,999	80%	12.5	996	92%	516.3	47,498
% Change 2001-2009		24.9%				2,632.0%			-14.3%			-61.5%			54.8%
Ages 21-49															
Year	Beer and Ale			Distilled Spirits			Alcopops			Wine			Total		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
2001	95%	257.5	24,527	72%	6.2	448	92%	25.8	2,375	93%	32.5	3,022	96%	317.8	30,372
2002	95%	281	26,799	80%	13.8	1,106	94%	81.3	7,662	91%	40.7	3,723	96%	410.3	39,289
2003	96%	292.9	27,983	80%	43.8	3,492	92%	31.6	2,900	87%	18.8	1,627	96%	376.1	36,003
2004	95%	354.2	33,771	82%	76.9	6,320	89%	22.4	1,984	87%	17.6	1,542	95%	457.0	43,617
2005	94%	323.4	30,417	87%	115.7	10,015	88%	24.4	2,150	88%	22.3	1,965	94%	472.1	44,548
2006	95%	247.8	23,544	85%	324.1	12,542	84%	22.8	1,913	88%	19.9	1,753	94%	422.9	39,752
2007	94%	293.2	27,547	86%	145.8	12,590	86%	14.8	1,278	89%	24.9	2,223	94%	462.6	43,638
2008	94%	310.2	29,110	87%	142.5	12,459	79%	22.1	1,748	87%	24.6	2,145	94%	483.8	45,461
2009	94%	354.8	33,335	91%	146.7	13,329	87%	22.8	1,972	84%	14.1	1,189	94%	529.7	49,825
% Change 2001-2009		35.9%				2,876.9%			-17.0%			-60.7%			64.1%
Ages 21+															
Year	Beer and Ale			Distilled Spirits			Alcopops			Wine			Total		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
2001	96%	254.8	24,355	74%	5.8	429	93%	25.2	2,329	94%	40.3	3,807	96%	321.7	30,920
2002	96%	277.3	26,517	81%	13.3	1,082	95%	76.9	7,282	93%	51.9	4,826	96%	412.5	39,706
2003	96%	287.0	27,504	81%	40.1	3,258	92%	28.8	2,665	90%	23.2	2,085	96%	396.7	35,512
2004	96%	351.0	33,601	84%	70.0	5,844	89%	21.2	1,900	89%	21.1	1,883	96%	450.7	43,227
2005	95%	331.2	31,541	88%	106.4	9,400	90%	22.7	2,036	91%	27.2	2,471	96%	475.9	45,447
2006	95%	258.3	24,669	84%	141.4	11,929	85%	20.8	1,772	90%	24.5	2,205	96%	424.0	40,575
2007	95%	294.9	28,050	88%	137.2	12,087	88%	13.3	1,166	92%	30.7	2,821	95%	462.4	44,125
2008	95%	308.7	29,330	89%	136.0	12,109	80%	19.7	1,581	90%	27.0	2,428	95%	478.4	45,449
2009	95%	350.8	33,322	93%	139.7	12,988	88%	21.0	1,853	88%	16.4	1,442	95%	522.2	49,605
% Change 2001-2009		36.8%				2,927.9%			-20.4%			-62.1%			60.4%

Source: The Nielsen Company, 2001-2009

II. Impact of Alcohol Industry Self-Regulatory Standards on Youth Exposure to Alcohol Advertising

The Federal Trade Commission (FTC) has emphasized repeatedly the importance of avoiding marketing alcoholic beverages to young people, and has encouraged alcohol companies to use self-regulatory standards to do so.²¹⁻²³ By 2003, trade associations for the three major segments of the alcohol producers (i.e., the wine, beer and liquor industries) agreed to stop advertising in media venues, including on television programs in which persons under the age of 21 made up more than 30 percent of the audience.

Even so, in 2009, 7.5 percent of TV advertisements for alcoholic beverages—a total of 23,718 ads—appeared on programming above the 30 percent threshold, with the largest number and percentage of noncompliant placements occurring on cable television (Table 4). These noncompliant advertisements accounted for 13 percent of youth exposure to alcohol advertising in 2009, 14 percent of exposure averaged over nine years, and 14 percent of exposure averaged over the six years since adoption of the 30 percent standard (data not shown). In contrast, the alcohol industry has substantially reduced total alcohol advertising in magazines, and is generally in compliance with the 30 percent threshold in that medium.²⁴

Table 4: Alcohol Product Advertisements on Programming with Greater Than 30 Percent Underage Audiences by Placement, 2001 to 2009

Year	Total TV			Broadcast Network TV			Cable Network TV			Broadcast Spot TV		
	Total Ads	Ads > 30%	% of Total Ads	Total Ads	Ads > 30%	% of Total Ads	Total Ads	Ads > 30%	% of Total Ads	Total Ads	Ads > 30%	% of Total Ads
2001	225,615	24,825	11.0%	5,018	171	3.4%	51,019	5,920	11.6%	169,578	18,734	11.0%
2002	299,356	36,246	12.1%	6,231	159	2.6%	80,633	9,847	12.2%	212,492	26,240	12.3%
2003	286,929	35,817	12.5%	4,950	96	1.9%	81,101	9,948	12.3%	200,878	25,773	12.8%
2004	285,757	32,074	11.2%	6,174	27	0.4%	115,384	13,795	12.0%	164,199	18,252	11.1%
2005	294,992	23,123	7.8%	5,641	0	0.0%	142,912	9,061	6.3%	146,439	14,062	9.6%
2006	299,475	18,220	6.1%	4,328	4	0.1%	140,977	4,876	3.5%	154,170	13,340	8.7%
2007	340,377	30,135	8.9%	4,015	0	0.0%	168,292	15,928	9.5%	168,070	14,207	8.5%
2008	316,837	27,180	8.6%	3,688	0	0.0%	178,047	17,357	9.7%	135,102	9,823	7.3%
2009	315,581	23,718	7.5%	4,916	0	0.0%	179,939	16,283	9.0%	130,726	7,435	5.7%
Total	2,664,919	251,338	9.4%	44,961	457	1.0%	1,138,304	103,015	9.0%	1,481,654	147,866	10.0%

Sources: The Nielsen Company, 2001-2009

As mentioned previously, both the Institute of Medicine and state attorneys general have proposed a 15 percent standard, which would be proportionate to the presence of youth ages 12 to 20 in the population age 12 and above (they are roughly 13 percent of the population age 2 and above measured by The Nielsen Company for television audiences). Youth exposure to alcohol ads grew 34 percent on programs with youth audience composition from 15 percent to 30 percent, while adult exposure grew only 22 percent on these same programs (data not shown). Thus, even if compliance with the 30 percent standard was perfect, the standard itself is not sufficient to prevent youth from being disproportionately exposed to alcohol advertising on television. This difference also highlights how ads placed on programs with youth audience composition above 15 percent are generating proportionately more youth exposure than adult exposure.

III. Audience Composition and Youth Overexposure

A. General

Youth overexposure occurs when companies place advertisements on programming with youth audiences that are greater, percentage-wise, than their presence in the general population.** These advertisements will generate more GRPs for youth than for adults.

From 2001 to 2009, the number of overexposing advertising placements grew from 55,719 to 67,656, more than one out of five placements, even though the percentage of placements that were overexposing declined. These overexposing advertisements were responsible for 44 percent of total youth exposure to alcohol advertising on television in 2009 (Table 5).

Table 5: Overexposing Alcohol Advertisements, Dollars, and Resulting Youth Exposure, 2001 to 2009

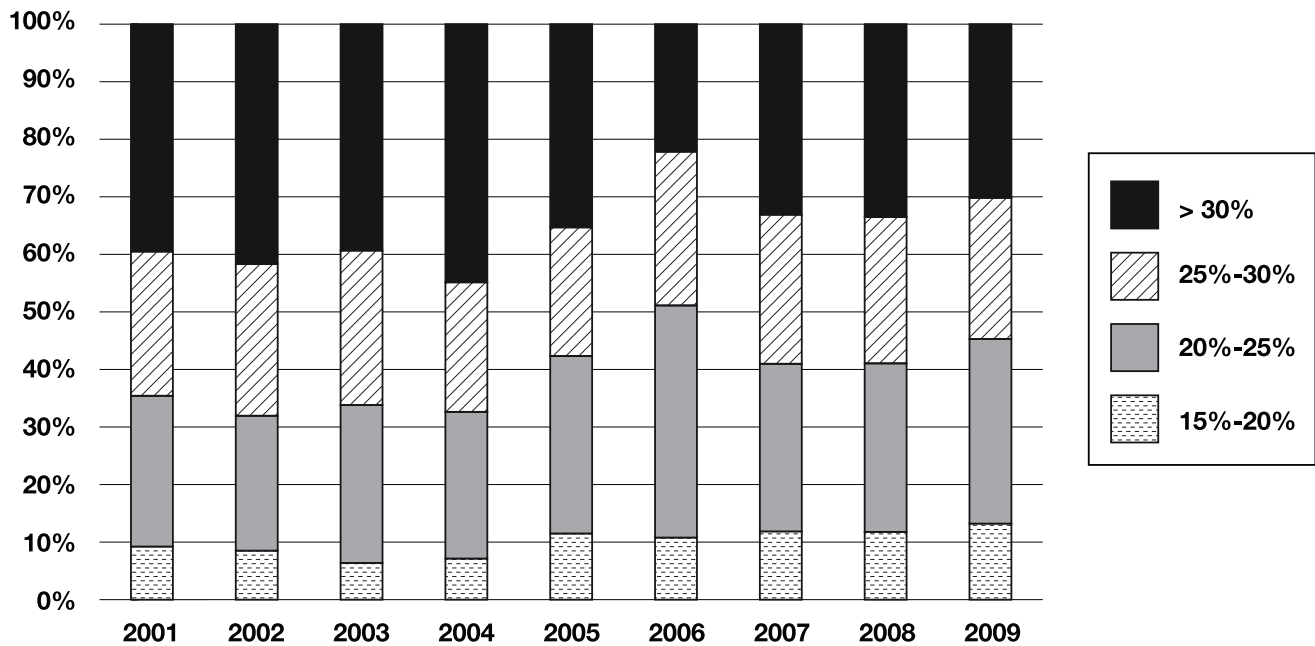
Year	Advertisements			Spending			Age 12-20 GRPs		
	Overexposing Ads	% of Total Ads	% Change vs. Prior Year	Overexposing Dollars	% of Total Dollars	% Change vs. Prior Year	Overexposing GRPs	% of Total Age 12-20 GRPs	% Change vs. Prior Year
2001	55,719	24.7%		\$111,922,605	14.4%		7,133	36.6%	
2002	77,388	25.9%	38.9%	\$121,563,351	12.2%	8.6%	9,403	36.9%	31.8%
2003	74,404	25.9%	-3.9%	\$125,643,285	14.1%	3.4%	9,381	40.1%	-0.2%
2004	67,103	23.5%	-9.8%	\$120,525,601	12.2%	-4.1%	10,754	38.7%	14.6%
2005	58,505	19.8%	-12.8%	\$111,785,402	10.9%	-7.3%	9,256	33.8%	-13.9%
2006	58,753	19.6%	0.4%	\$115,284,699	11.6%	3.1%	9,220	36.4%	-0.4%
2007	71,006	20.9%	20.9%	\$85,327,980	10.7%	-26.0%	12,363	43.6%	34.1%
2008	68,025	21.5%	-4.2%	\$91,288,661	11.1%	7.0%	13,694	44.8%	10.8%
2009	67,656	21.4%	-0.5%	\$114,988,939	12.0%	26.0%	14,687	44.1%	7.3%
% Change: 2001-2009			21.4%	2.7%			105.9%		

Source: The Nielsen Company, 2001-2009

For every year studied, more than half of the youth exposure generated by overexposing advertising placements came from ads on programming with youth audiences between 15 percent and 30 percent. This proportion has actually increased since 2004, when the 30 percent standard went into effect. As Figure 3 illustrates, this overexposure occurred throughout exposure bands with between 15 and 30 percent youth audience compositions.

** Underage youth are more likely to see on a per capita basis, or be overexposed to, a televised ad for alcohol when it is placed on a program where the percentage of underage youth in the audience is greater than the percentage of underage youth in the general population. Because youth ages 12-20 are approximately 13 percent of the measured television population of persons ages 2 and older (subject to variation by local market), some ad placements with less than 15 percent age 12-20 composition will overexpose youth relative to adults. However, in practice, very little overexposure occurs under 15 percent (less than two GRPs in every year measured).

Figure 3: Ages 12 to 20 Overexposure by Audience Composition Ranges, 2001 to 2009



Source: The Nielsen Company, 2001-2009

B. On Cable Television

Overall on cable television, there has been a dramatic increase in alcohol product advertising since 2001. The number of beer ads grew by 183 percent, and spirits ads by 3,078 percent. Youth exposure to beer advertising on cable grew by 133 percent, and youth exposure to distilled spirits advertising on cable increased more than 30-fold (Table 6).

Table 6: Change in Alcohol Product Advertising on Cable by Beverage Type, 2001 to 2009

Year	Alcohol Advertisements on Cable TV				Age 12-20 Exposure on Cable TV			
	Beer and Ale	Distilled Spirits	Alcopops	Wine	Beer and Ale	Distilled Spirits	Alcopops	Wine
2001	36,834	1,973	3,046	9,166	6,949	290	752	666
2002	42,182	5,054	13,738	19,659	7,980	695	2,735	1,363
2003	46,128	19,396	6,381	9,196	8,769	2,383	1,350	659
2004	67,384	33,738	6,043	8,219	12,305	4,859	1,041	699
2005	81,461	44,752	6,928	9,771	11,277	7,617	1,262	809
2006	65,784	59,526	6,506	9,161	8,332	9,233	1,410	709
2007	90,620	62,769	4,335	10,568	12,279	9,016	886	940
2008	99,236	61,201	8,135	9,475	13,836	9,199	1,442	1,043
2009	104,369	62,701	7,420	5,449	16,177	9,687	1,300	569
% Change 2001-2009	183.3%	3078.0%	143.6%	-40.6%	132.8%	3237.4%	73.0%	-14.6%

Source: The Nielsen Company, 2001-2009

Since 2007, the majority of this youth exposure to alcohol advertising on cable television has resulted from the placement of advertising on programs with disproportionately large youth audiences. By 2009, more than three-quarters of the advertising placements that overexposed youth appeared on cable television. These 52,354 advertisements generated 43 percent of all youth exposure to alcohol product advertising on television in 2009, and 98 percent of youth overexposure (Table 7).

Table 7: Youth Overexposure to Alcohol Product Advertising on Cable, 2001 to 2009

Year	All Ads	Overexposing Ads	All on Cable TV	All Overexposing on Cable TV	Cable TV Overexposing % of all Ads	Cable TV Overexposing % of All Cable TV Ads	Cable TV Overexposing % of All Overexposing Ads
2001	225,615	55,719	51,019	17,788	7.9%	34.9%	31.9%
2002	299,356	77,388	80,633	29,706	9.9%	36.8%	38.4%
2003	286,929	74,404	81,101	28,300	9.9%	34.9%	38.0%
2004	285,757	67,103	115,384	37,186	13.0%	32.2%	55.4%
2005	294,992	58,505	142,912	32,671	11.1%	22.9%	55.8%
2006	299,475	58,753	140,977	33,748	11.3%	23.9%	57.4%
2007	340,377	71,006	168,292	45,565	13.4%	27.1%	64.2%
2008	316,837	68,025	178,047	49,780	15.7%	28.0%	73.2%
2009	315,581	67,656	179,939	52,354	16.6%	29.1%	77.4%

Year	All Youth Exposure	All Overexposure	All Exposure on Cable TV	All Overexposure on Cable TV	Cable TV Overexposure % of All Exposure	Cable TV Overexposure % of All Exposure on Cable TV	Cable TV Overexposure % of All Overexposure
2001	19,502	7,133	8,657	4,273	21.9%	49.4%	59.9%
2002	25,482	9,403	12,773	6,735	26.4%	52.7%	71.6%
2003	23,381	9,381	13,161	6,977	29.8%	53.0%	74.4%
2004	27,803	10,754	18,904	9,470	34.1%	50.1%	88.1%
2005	27,410	9,256	20,965	8,626	31.5%	41.1%	93.2%
2006	25,353	9,220	19,684	8,693	34.3%	44.2%	94.3%
2007	28,355	12,363	23,121	11,875	41.9%	51.4%	96.1%
2008	30,567	13,694	25,520	13,374	43.8%	52.4%	97.7%
2009	33,304	14,687	27,733	14,402	43.2%	51.9%	98.1%

Source: The Nielsen Company, 2001-2009

Some individual cable channels do not accept alcohol advertising, in recognition of the youthful nature of their audiences. For example, MTV, Nickelodeon, and VH1 have generated little or no youth exposure to alcohol advertising since 2007, suggesting an absence of alcohol ads on those channels. BET also appears to have cut back on alcohol advertising in 2006, as evidenced by the large decline in age 12-to-20 GRPs (Table 8). However, by 2009, BET was accepting advertising again, and the network recently announced an alcohol-branded program in collaboration with Diageo, the world's largest spirits marketer.²⁵

Alcohol ads placed on Comedy Central expose youth between the ages of 12 and 20 disproportionately relative to adults ages 21 and older, and comparably relative to young adults ages 21 to 34. FX also overexposes youth relative to adults 21 and above, and in 2009 the network exposed youth almost as effectively as young adults. Also in 2009, Spike delivered slightly greater exposure to youth than to adults 21 and above (Table 8).

Table 8: Ratio of Youth to Adult and Young Adult Exposure to Alcohol Product Advertising on Specific Cable Channels, 2001 to 2009

	Comedy Central				BET			
	GRPs Age 12-20	Ratios			GRPs Age 12-20	Ratios		
		12-20/21+	12-20/21-34	12-20/21-49		12-20/21+	12-20/21-34	12-20/21-49
2001	1,348	2.09	1.22	1.57	333	2.00	1.44	1.69
2002	2,624	1.90	1.12	1.44	407	2.04	1.31	1.68
2003	1,638	1.89	1.00	1.35	447	1.97	1.32	1.52
2004	1,802	1.94	1.09	1.42	477	2.39	1.35	1.82
2005	1,641	1.53	1.10	1.24	262	2.76	1.53	2.06
2006	1,872	1.48	1.05	1.23	1	2.49	1.55	1.89
2007	2,144	1.38	0.89	1.11	60	2.49	1.57	1.87
2008	2,170	1.61	1.06	1.29	36	2.26	1.41	1.71
2009	2,166	1.38	1.02	1.15	138	1.79	1.22	1.41

	FX				SPIKE			
	GRPs Age 12-20	Ratios			GRPs Age 12-20	Ratios		
		12-20/21+	12-20/21-34	12-20/21-49		12-20/21+	12-20/21-34	12-20/21-49
2001	395	0.74	0.71	0.67	138	0.68	0.81	0.75
2002	823	0.64	0.59	0.58	347	0.78	0.76	0.73
2003	835	0.66	0.62	0.59	803	0.92	0.86	0.84
2004	1,626	0.92	0.76	0.78	1,640	0.84	0.81	0.77
2005	2,284	0.97	0.82	0.83	2,202	0.75	0.78	0.73
2006	2,730	1.06	0.86	0.90	1,886	0.68	0.65	0.65
2007	3,024	1.05	0.84	0.88	1,980	0.76	0.73	0.71
2008	3,570	1.24	0.98	1.02	2,198	0.78	0.78	0.75
2009	3,462	1.15	0.95	0.96	2,383	1.03	0.89	0.90

	E!				Discovery Channel			
	GRPs Age 12-20	Ratios			GRPs Age 12-20	Ratios		
		12-20/21+	12-20/21-34	12-20/21-49		12-20/21+	12-20/21-34	12-20/21-49
2001	447	0.74	0.57	0.63	57	0.50	0.55	0.52
2002	786	0.78	0.59	0.66	67	0.36	0.45	0.41
2003	1,035	0.79	0.62	0.67	81	0.70	0.56	0.61
2004	1,448	0.81	0.60	0.67	521	0.79	0.56	0.63
2005	1,606	0.86	0.64	0.70	857	0.72	0.63	0.62
2006	1,573	1.03	0.67	0.80	778	0.82	0.74	0.72
2007	1,176	1.05	0.65	0.80	1,423	1.07	0.86	0.90
2008	1,215	1.09	0.67	0.84	1,843	0.96	0.86	0.86
2009	1,034	1.06	0.66	0.81	2,233	0.91	0.86	0.81

Source: The Nielsen Company, 2001-2009

IV. Industry Standards and Youth Overexposure by Brand

Different alcohol brands market to different audience segments. In 2009, 151 alcohol brands advertised their products on television. Of these, a very small number—13 brands or 9 percent—were responsible for half of youth exposure above the industry's 30 percent maximum composition for underage audiences, and placed 60 percent of the industry's advertisements that were over the threshold. Five of these brands were controlled by SABMiller (Miller Lite, Coors Light, Miller Genuine Draft Light Beer, Miller Chill and Miller High Life), two by Diageo (Captain Morgan Rums and Crown Royal Whiskey), and two by Anheuser-Busch Inbev (Bud Light and Labatt Blue Light Beer) (Table 9).

**Table 9: Alcohol Brands Generating the Most Youth Exposure Above 30 Percent
(ranked by number of ads above 30 percent), 2009**

Brand	Parent Company	Ads >30%	% of All Brand Ads	Cumulative Ads (>30%)	Cumulative % of Ads (>30%)	Youth Ages 12-20 GRPs > 30%	% of All Brand Ages 12-20 GRPs	Cumulative Youth GRPs (>30%)	Cumulative % of Youth GRPs (>30%)
Miller Lite	SABMILLER PLC	2,521	9.2%	2,521	10.6%	405	13.7%	405	9.1%
Coors Light	SABMILLER PLC	2,280	11.1%	4,801	20.2%	220	10.0%	625	14.0%
Captain Morgan Rums	DIAGEO PLC	1,391	9.5%	6,192	26.1%	246	18.7%	871	19.5%
Bud Light	STICHTING ANHEUSER-BUSCH INBEV	1,249	6.8%	7,441	31.4%	212	7.1%	1,083	24.3%
Samuel Adams Boston Lager	BOSTON BEER CO INC	1,142	8.2%	8,583	36.2%	265	18.4%	1,348	30.2%
Corona Extra Beer	GRUPO MODELO SA DE CV	936	10.0%	9,519	40.1%	120	11.1%	1,468	32.9%
Crown Royal Whiskey	DIAGEO PLC	834	9.1%	10,353	43.7%	86	13.9%	1,554	34.9%
Miller Genuine Draft Light Beer	SABMILLER PLC	707	7.2%	11,060	46.6%	276	14.6%	1,829	41.0%
Miller Chill	SABMILLER PLC	645	11.9%	11,705	49.4%	180	23.2%	2,010	45.1%
Disaronno Originale Amaretto	ILLVA SARONNO HOLDING SPA	639	8.2%	12,344	52.0%	115	15.6%	2,125	47.7%
Tecate Light Beer	FOMENTO ECONOMICO MEXICAN SAB DE CV	638	9.4%	12,982	54.7%	15	17.5%	2,139	48.0%
Labatt Blue Light Beer	STICHTING ANHEUSER-BUSCH INBEV	636	5.3%	13,618	57.4%	8	17.9%	2,147	48.2%
Miller High Life	SABMILLER PLC	541	7.3%	14,159	59.7%	63	16.1%	2,210	49.6%

Source: The Nielsen Company, 2009

The majority of total youth overexposure also came from a relatively small group of brands. Twelve brands were responsible for nearly half of all overexposing youth GRPs in 2009, and just over half of the overexposing advertising placements. Five of these brands—Captain Morgan Rums, Samuel Adams Boston Lager, Crown Royal Whiskey, Smirnoff Vodkas and Miller Chill—accrued more than half of their youth exposure from overexposing advertising placements (Table 10).

**Table 10: Alcohol Brands Generating the Most Youth Overexposure
(ranked by number of overexposing ads), 2009**

Brand	Overexposing Ads	% of Total Brand Ads	Cumulative Overexposing Ads	Cumulative % of Overexposing Ads	Overexposing Youth Ages 12-20 GRPs	% of Total Brand Ages 12-20 GRPs	Cumulative Overexposing Youth GRPs	Cumulative % of Overexposing Youth GRPs
Miller Lite	6,545	23.9%	6,545	9.7%	1,283	43.5%	1,283	8.7%
Coors Light	5,613	27.2%	12,158	18.0%	844	38.5%	2,127	14.5%
Captain Morgan Rums	3,721	25.5%	15,879	23.5%	731	55.5%	2,858	19.5%
Bud Light	3,469	18.8%	19,348	28.6%	805	27.0%	3,663	24.9%
Samuel Adams Boston Lager	3,177	22.9%	22,525	33.3%	749	52.0%	4,412	30.0%
Miller Genuine Draft Light Beer	2,584	26.3%	25,109	37.1%	902	47.9%	5,314	36.2%
Crown Royal Whiskey	2,224	24.2%	27,333	40.4%	360	58.7%	5,675	38.6%
Corona Extra Beer	2,152	22.9%	29,485	43.6%	367	34.1%	6,042	41.1%
Disaronno Originale Amaretto	1,854	23.7%	31,339	46.3%	356	48.3%	6,398	43.6%
Smirnoff Vodkas	1,742	17.8%	33,081	48.9%	375	53.9%	6,773	46.1%
Miller Chill	1,731	31.9%	34,812	51.5%	449	57.7%	7,222	49.2%
Labatt Blue Light Beer	1,495	12.5%	36,307	53.7%	17	37.6%	7,239	49.3%

Source: The Nielsen Company, 2009

V. Youth Exposure to Alcohol Industry-Sponsored “Responsibility” Advertising

In addition to product advertising, alcohol companies place “responsibility” advertisements on television. These advertisements usually include brand or corporate logos (or both). Of the 169 alcohol companies advertising on television between 2001 and 2009, 18 (11 percent) placed some kind of “responsibility” advertising (Table 11).

Table 11: Alcohol Companies Placing “Responsibility” Advertising, 2001 to 2009

Parent Company	Dollars Spent on Product Advertising	% of Company Total	Dollars Spent on “Responsibility” Advertising	% of Company Total	Dollars Spent on On Other*	% of Company Total	Total Advertising Dollars
DIAGEO PLC	\$576,284,210	82.3%	\$117,271,559	16.8%	\$6,488,078	0.9%	\$700,079,049
ANHEUSER-BUSCH COS INC	\$1,935,114,464	94.0%	\$20,032,736	1.0%	\$84,525,983	4.1%	\$2,058,426,633
MOLSON COORS BREWING CO	\$913,703,356	98.6%	\$10,766,745	1.2%	\$2,003,708	0.2%	\$926,473,809
LARCHE HOLDING SA	\$65,531,698	87.7%	\$9,199,286	12.3%	\$10,421	0.0%	\$74,741,405
BACARDI LTD	\$139,407,870	93.9%	\$8,192,299	5.5%	\$860,273	0.6%	\$148,460,442
STICHTING ANHEUSER-BUSCH INBEV	\$998,333,615	98.3%	\$6,031,904	0.6%	\$11,419,334	1.1%	\$1,015,784,853
HEINEKEN NV	\$133,214,870	96.5%	\$4,789,030	3.5%	\$0	0.0%	\$138,003,900
BROWN-FORMAN CORP	\$96,703,713	97.4%	\$2,436,899	2.5%	\$118,198	0.1%	\$99,265,290
PERNOD RICARD SA	\$103,565,126	97.6%	\$2,223,286	2.1%	\$280,045	0.3%	\$106,068,457
INBEV	\$170,983,697	98.8%	\$1,888,620	1.1%	\$231,647	0.1%	\$173,103,964
SABMILLER PLC	\$1,851,613,973	99.0%	\$1,259,951	0.1%	\$16,494,134	0.9%	\$1,869,516,847
KETEL ONE WORLDWIDE BV	\$7,810,253	86.2%	\$1,252,206	13.8%	\$186	0.0%	\$9,062,645
FORTUNE BRANDS INC	\$11,898,995	95.7%	\$312,619	2.5%	\$220,875	1.8%	\$12,432,489
SILVER EAGLE DISTRIBUTORS LP	\$1,784	0.8%	\$182,338	81.3%	\$40,133	17.9%	\$224,255
ST MAARTEN SPIRITS LTD	\$6,985,017	98.3%	\$102,408	1.4%	\$16,452	0.2%	\$7,103,877
US GOVERNMENT	\$229,587	89.4%	\$27,083	10.6%	\$0	0.0%	\$256,670
NINKASI BREWING CO LLC	\$0	0.0%	\$1,473	100.0%	\$0	0.0%	\$1,473
CONSTELLATION BRANDS INC	\$65,614,805	99.9%	\$95	0.0%	\$40,414	0.1%	\$65,655,314

Source: The Nielsen Company, 2001-2009

*“Other” refers to corporate, event, or sponsorship advertising.

Alcohol companies spent 44 times as much money advertising their products as they did placing “responsibility” advertising (Table 12). The messages in these advertisements are primarily about drinking and driving, or some other aspect of safety or moderation. From 2001 to 2005, alcohol companies placed more than 11,000 ads warning against underage drinking.²⁶ Since that time, aside from a handful that appeared in 2007, alcohol companies have not placed these messages on television.

Table 12: Product and Responsibility Ads and Spending, 2001 to 2009

Year	Ads			Advertising Spending		
	Product	"Responsibility"	Ratio	Product	"Responsibility"	Ratio
2001	225,615	15,152	14.9	\$779,110,078	\$29,675,993	26.3
2002	299,356	2,380	125.8	\$997,185,610	\$11,976,304	83.3
2003	286,929	3,263	87.9	\$890,836,725	\$17,102,364	52.1
2004	285,757	7,922	36.1	\$987,227,322	\$17,644,982	55.9
2005	294,992	12,046	24.5	\$1,028,506,956	\$27,464,048	37.4
2006	299,475	16,038	18.7	\$992,175,810	\$24,886,721	39.9
2007	340,377	16,824	20.2	\$796,996,673	\$19,331,974	41.2
2008	316,837	15,079	21.0	\$824,559,390	\$14,471,262	57.0
2009	315,581	9,981	31.6	\$955,744,782	\$23,416,889	40.8
TOTAL	2,664,919	98,685	27.0	\$8,252,343,346	\$185,970,537	44.4

Source: The Nielsen Company, 2001-2009

In terms of youth exposure to television advertising, alcohol product advertising overwhelms the industry's "responsibility" advertising. From 2001 to 2009, young people saw 22 times as much advertising for alcohol products as they did for alcohol company-sponsored "responsible" drinking messages (Table 13).

Table 13: Youth and Adult Exposure to Alcohol Product and "Responsibility" Advertising, 2001 to 2009

	GRPs			
	Youth Ages 12-20	Young Adults Ages 21-34	Adults Age 21+	Adults Age 35+
Product	241,158	364,769	374,566	378,049
Underage Drinking	519	768	784	790
Drinking-Driving/Safety	8,430	11,475	11,101	10,967
All "Responsibility"	10,904	14,922	14,431	14,256
Proportion of Product to "Responsibility"				
Product:Underage Drinking	465	475	478	478
Product:Drinking-Driving/Safety	29	32	34	34
Product:All "Responsibility"	22	24	26	27

Source: The Nielsen Company, 2001-2009

VI. Conclusion

Since 2001, when CAMY began monitoring youth exposure to alcohol advertising, prevalence of underage drinking in the United States has remained stubbornly high, and more than 40,000 young people have lost their lives due to alcohol use. Evidence of the influence of alcohol advertising and marketing on underage drinking behavior has continued to mount. In 2003, the Federal Trade Commission announced that alcohol companies had agreed to a new 30 percent maximum for youth audiences for their advertising. In 2008, the FTC praised the industry for its compliance with the new standard, with one of the five sitting commissioners dissenting.²³

From the perspective of 2010, and looking at six years of data since adoption of the new standard, the industry's 30 percent rule has failed to protect against or hold back the tide of youth exposure to alcohol advertising on television. The rise of cable as a highly segmented medium, and the rapid growth of distilled spirits advertising on that medium, has caused youth exposure to alcohol advertising to rise dramatically on television, at a rate faster than that of either young adults or adults ages 21 and above.

Furthermore, analysis of where youth overexposure occurs shows that programming with between 20 percent and 25 percent youth audiences generated the largest amount of youth overexposure in 2009 (see Figure 3), and that overexposure from programming with between 15 percent and 25 percent youth audiences has been rising since 2007.

These findings point to the need for stronger placement standards for alcohol advertisers. In May 2010, the World Health Organization adopted the first Global Strategy to Reduce Alcohol-Related Harm. Marketing is one of 10 areas where the strategy encourages action by Member States, specifically the setting up of "regulatory or co-regulatory frameworks, preferably with a legislative basis."²⁷ In the U.S., 20 state attorneys general, as well as the Institute of Medicine and the National Research Council, have called for stronger standards, specifically a 15 percent maximum for audiences of alcohol advertising between the ages of 12 and 20.^{18,19} Such a standard is feasible and more likely to be effective than the industry's current guideline.

Appendix A: Methodology

1. Sources

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

- The Nielsen Company provides date, time, source, program and expenditure data for each commercial occurrence.
- The Nielsen Company also provides demographic audience impressions and ratings that are associated with each ad occurrence. This information is provided as follows:
 - 1) network programming and viewing in local “people meter” markets is measured year-round, and
 - 2) ratings for most spot (local market) programming (other than “people meter” markets) are assumed to be equivalent to the average ratings of “sweeps” months—typically in February, May, July and November—and any other measured months in the same quarter. The one exception is that September ratings are taken from the fourth quarter average rather than the summer months of the third quarter, since new fall TV season programs commonly begin in September and ratings for that month are more reflective of fall than summer audiences.
 - 3) CAMY used so-called “Live plus 7” ratings for this report; a comparison of program ratings and so-called commercial ratings for national television is provided in Appendix B.
- Impact Databank, a market research firm serving the alcoholic beverage industry, provides industry-accepted classifications for all brands of alcoholic beverages.

2. Process

A. Aggregation levels

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

- media type (network, cable or spot)
- network (NBC, FOX, ESPN, etc.)
- program type (sports, sitcoms, etc., as defined by The Nielsen Company)
- daypart (time of day/week, using industry-accepted classifications)
- Impact Databank (product type) classification (beer and ale, distilled spirits, alcopops, wine)
- brand (Coors Light, etc.)
- parent company (SAB Miller, etc.)
- ad classification (product, “responsibility,” event, sponsorship, corporate and other)

B. Calculating GRPs and impressions

Youth audience composition was calculated using a base of viewers age 2 and over as defined by Nielsen, allowing for the annual universe estimate adjustment in September of each year. Composition for all programs was calculated using the most appropriate interval reported by The Nielsen Company, typically the quarter-hour in which the occurrence was reported. National (broadcast and cable) gross rating points (GRPs) and impressions were combined with no adjustment, while spot TV GRPs were “nationalized” (i.e., aggregated to reflect national GRPs) by summing the local market ad impressions and dividing the total by the national base.

Note on estimated audiences for spot advertisements

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

C. Counting and qualifying ads

Product alcohol ads were included in this analysis if it was determined from their description that they were promoting products and were not general corporate advertisements, “responsibility” advertisements or other public service announcements. An alcohol ad was considered to overexpose youth when it was placed on a program where the percentage of underage youth in the audience was greater than the percentage of underage youth in the general population, that is, when the youth (ages 12 to 20) rating was higher than the adult 21+ rating for the time period and program in which the advertisement appeared.

D. GRP calculations and estimated reach

GRPs for demographic groups were calculated by daypart, media type, and network and program type and were used to estimate reach and frequency using the Nielsen 2008 Persons Cume Study with T*View from Stone House Systems, a widely used application for estimating audience reach and frequency.

E. “Responsibility” advertising analysis

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

Appendix B: Commercial Versus Program Ratings

CAMY generally uses so-called “Live plus 7” (or L7) program ratings for its television advertising analyses. This methodology reports the live audience for a given program, plus any program audience for which there is DVR (digital video recorder) playback within a seven-day period of the telecast (but not viewing on network Web pages, Hulu or other Web-based media).

It is now common for major TV advertisers to estimate audiences based on commercial ratings, which measure the specific audience for a TV commercial. The current standard is C3 ratings, which represent the live commercial audience plus up to three days of DVR playback. C3 ratings are only available nationally and in markets that are measured by the most current ratings measurement systems (i.e., people meters).

In order to assess the difference between C3 and L7 ratings for purposes of measuring youth exposure to alcohol advertising, CAMY commissioned an analysis from Nielsen to compare youth and adult exposure using both methods.

The analysis summed up GRPs for the Beer and Ale category in the fourth quarter of 2008 for various age segments. Beer and Ale was chosen because this category has measurable data for all TV media types.

The analysis shown in Table 14 shows that on average, total GRPs using C3 ratings are 91 percent to 94 percent of total GRPs using L7 ratings; that is, C3 ratings are slightly lower. For cable TV, C3 GRPs are 90 percent to 93 percent of L7 GRPs, while for network TV, C3 GRPs are 93 percent to 95 percent of L7 GRPs.

In terms of relative exposure, the relationship between various demographics is unchanged regardless of which methodology is used. Exposure ratios vary by no more than .012 across the analyzed demographics and media types. A program, brand or network that overexposes youth relative to adults will do so regardless of whether C3 or L7 ratings are used.

Based on the results of this analysis, and the primary CAMY objective of reporting relative exposure for youth and adults, this report continues CAMY's practice of using L7 ratings in order to ensure comparability across media and markets.

Table 14: Commercial versus Program Ratings Comparison

A. Total GRPs		C3 Ratings	L7 Ratings	C3 as % of L7
Network TV				
Ages 2-11		773	815	95%
Ages 12-20		1,220	1,300	94%
Ages 21-34		2,304	2,475	93%
Age 21+		2,922	3,128	93%
Age 35+		3,142	3,360	94%
Age 2-20		987	1,047	94%
Cable TV				
Ages 2-11		1,241	1,337	93%
Ages 12-20		2,872	3,141	91%
Ages 21-34		3,858	4,286	90%
Age 21+		3,893	4,293	91%
Age 35+		3,905	4,296	91%
Age 2-20		2,021	2,199	92%
Combined Network and Cable				
Ages 2-11		2,013	2,152	94%
Ages 12-20		4,093	4,440	92%
Ages 21-34		6,162	6,761	91%
Age 21+		6,815	7,422	92%
Age 35+		7,047	7,656	92%
Age 2-20		3,008	3,246	93%
B. GRP Exposure Ratios				
Media Type Demos		C3 Ratings	L7 Ratings	Difference (C3 - L7)
Network TV	2-20 / 21+	0.338	0.335	0.003
Network TV	12-20 / 21+	0.418	0.415	0.002
Network TV	12-20 / 21-34	0.530	0.525	0.005
Cable	2-20 / 21+	0.519	0.512	0.007
Cable	12-20 / 21+	0.738	0.732	0.006
Cable	12-20 / 21-34	0.745	0.733	0.012
Combined	2-20 / 21+	0.441	0.437	0.004
Combined	12-20 / 21+	0.601	0.598	0.002
Combined	12-20 / 21-34	0.664	0.657	0.007

Source: The Nielsen Company, 4Q 2008

Appendix C: Glossary of Advertising Terms

Rating

Audience as a percentage of a universe estimate.

Universe Estimate

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

Impressions

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

Gross Impressions

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

Gross Rating Points (GRPs)

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

Reach and Frequency

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

Audience Composition

Research companies collect demographic information about audiences for different media such as magazines, television programs or radio stations. Demographics usually include age, gender and race, among other factors. For the example of a medium with an audience of 100,000 people, research may report that 20,000 are ages 2 to 20, and 80,000 are ages 21 and above. In that case, the **composition** of the audience is calculated by looking at the percentage of the audience that meets different demographic criteria. In this example, the audience composition is 20 percent for ages 2 to 20 and 80 percent for ages 21 and above.

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