

YOUTH EXPOSURE TO ALCOHOL ADVERTISING IN NATIONAL MAGAZINES, 2001-2008

Executive Summary

Because there is growing evidence that youth* exposure to alcohol advertising increases the likelihood and quantity of underage drinking,¹ reducing youth exposure is an important public health goal. Leading alcohol companies self-regulate their advertising practices, and in 2003 pledged to strengthen their standards from a maximum of 50 percent underage audience composition for publications in which they placed their advertising to a 30 percent maximum. Also in 2003, the National Research Council and Institute of Medicine recommended that the industry move toward a 15 percent maximum youth audience for its advertising placements, based on the percentage of young people ages 12 to 20 in the general population.

This report seeks to answer four questions regarding alcohol advertising in magazines: Did alcohol companies meet their 30 percent standard? Did youth exposure† to alcohol advertising fall? Did the prevalence of youth exposure coming from overexposure (that is, the prevalence of advertising appearing in magazines where the percentage of youth in the readership exceeds their percentage in the general population) decline? What steps are needed to continue to reduce youth exposure and overexposure?

Key findings of the analysis include:

- From 2001 to 2008, youth exposure to alcohol advertising in magazines fell by 48 percent. Adult (age 21 and above) exposure declined by 29 percent and young adult (ages 21 to 34) dropped by 31 percent.
- Alcohol advertising placed in publications with under 21 audiences greater than 30 percent fell to almost nothing by 2008.
- The 30 percent standard affected placements in only nine of the 160 magazines in which alcohol companies placed their advertising between 2001 and 2008.
- Youth exposure in magazines with youth age 12-to-20 audience composition above 15 percent declined by 48.4 percent. However, the percentage of youth exposure coming from this advertising increased from 69 percent to 78 percent.
- Continued declines in youth overexposure will depend on the actions of a small number of brands: In 2008, 16 brands (5 percent of the total 325 advertising in magazines) accounted for 50 percent of youth exposure in magazines with youth compositions above 15 percent, and 40 brands (13 percent) were responsible for 80 percent of youth exposure in these magazines.

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

† Youth exposure and overexposure (as well as “more likely to be read 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 population are exposed to advertising). Had exposure been measured by gross impressions alone, youth exposure would have fallen by 45 percent from 2001 to 2008, and adult exposure would have fallen by 21 percent. The adult population will almost always receive far more gross impressions than youth because there are far more adults in the population than youth. Gross rating points are calculated by dividing gross impressions by the relevant population (e.g., persons ages 21 and over) and multiplying by 100, resulting in a more comparable per capita measurement. See Appendix B for a glossary of terms.

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Background

More young people in the U.S. drink alcohol every month than smoke cigarettes or use any illegal drug. In 2008, 10.1 million young people between the ages of 12 and 20 reported drinking in the past month, and 6.6 million reported binge drinking (consuming five or more drinks within two hours).² Alcohol use causes more than 4,600 deaths of persons under 21 each year, according to the Centers for Disease Control and Prevention.³ It is closely associated with the three leading causes of death among persons ages 12 to 20: unintentional injuries (including motor vehicle crashes), homicide and suicide.^{4,5} Binge-drinking high school students are more likely to report poor school performance, riding with a driver who had been drinking, being currently sexually active, smoking cigarettes or cigars, being a victim of dating violence, attempting suicide and using illicit drugs.⁶

A substantial body of federally funded and international research into the effects of alcohol advertising on young people's drinking has consistently shown that the more young people are exposed to alcohol advertising, the more likely they are to initiate drinking or to drink more heavily if they are already drinkers.¹ At least 13 studies have followed cohorts of young people over time, measuring their exposure to alcohol marketing and then studying their subsequent drinking behavior. These studies have found that exposure to television beer advertisements,⁷⁻⁹ alcohol ads in magazines,⁷⁻⁸ alcohol ads on billboards,^{8,10} in-store beer marketing displays,⁷ beer concessions at sporting events⁷ and alcohol use in movies¹¹ increased the likelihood of drinking among young people. Ownership of alcohol promotional items was also strongly associated with drinking initiation^{12,13}, while per capita spending on alcohol advertising in a young person's media market increased both the likelihood of drinking and the chances of young people drinking heavily well into their mid-20s.⁸

The principal way that young people are protected from exposure to alcohol advertising is through the alcohol industry's own self-regulatory standards. The Federal Trade Commission (FTC) in 1999 recommended that alcohol companies tighten their voluntary standards from a 50 percent limit on underage audience composition in media where alcohol advertising was placed to a 30 percent limit. In 2000, the Wine Institute complied. In 2003, trade associations for the beer and distilled spirits industries announced that they would no longer advertise in media with greater than 30 percent underage audiences. Also in 2003, the National Research Council and Institute of Medicine called on alcohol companies to move toward a 15 percent placement standard based on the proportion of the viewing, reading or listening audience between the ages of 12 and 20.¹⁴

In 2006, 20 state attorneys general asked the Federal Trade Commission to explore with the industry the reduction to a 15 percent standard from the industry's current standard barring advertising where persons under 21 represent more than 30 percent of the audience for advertising.¹⁵ 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.¹⁶

Advertising in media in which youth ages 12 to 20 make up more than 15 percent of the audience generally results in these youth being "overexposed," that is, they are receiving advertising exposure that is out of proportion with their presence in the population.[‡] Although the overwhelming majority of alcohol brands do not overexpose youth with their magazine advertising, overexposure continues to account for nearly three-quarters of total youth exposure. Thirteen percent of alcohol brands advertising in magazines cause 80 percent of the youth overexposure. The industry has made progress in reducing total youth exposure to alcohol advertising in magazines, but continued success will rely on changes in the advertising practices of specific alcohol brands.

‡ The proportion of youth ages 12 to 20 as a percentage of all persons age 12 and above varies from 15.10 percent to 15.75 percent over the 2001 to 2008 study period. In cases where a publication has a 12-to-20 audience composition greater than 15 percent but less than the 12-to-20 population composition for a given year, such as with *People* magazine in 2006 and 2008 (15.03 percent), alcohol ad placements in that magazine exceed 15 percent composition but do not overexpose youth ages 12 to 20 relative to adults ages 21 and above. This exception occurs with the following publications and years:

Year	Publication	Ads	12-20 % Comp	Universe % Comp
2003	Harpers Bazaar	2	15.10%	15.18%
2005	Blender	62	15.10%	15.36%
2006	People	15	15.03%	15.16%
2008	People	18	15.03%	15.14%
2008	OK! Magazine	27	15.11%	15.14%

About This Report

The Center on Alcohol Marketing and Youth at the Johns Hopkins Bloomberg School of Public Health (www.camy.org) monitors the marketing practices of the alcohol industry to focus attention and action on industry practices that jeopardize the health and safety of America's youth. Reducing high rates of underage alcohol consumption and the suffering caused by alcohol-related injuries and deaths among young people requires using the public health strategies of limiting the access to and the appeal of alcohol to underage persons. CAMY is funded by the Centers for Disease Control and Prevention.

CAMY commissioned Virtual Media Resources (VMR) to analyze advertisements for alcoholic beverages placed in national magazines for which audience data were available (see below) from 2001 to 2008. VMR is a media research, planning, market analysis and consulting firm based in Natick, Massachusetts, serving communications organizations and marketers in a wide variety of market segments and media. VMR was established in 1992 to provide an independent marketing research firm serving advertising agencies and has grown to service more than 100 clients across the United States and Canada in retail, publishing, financial, automotive, public health and other fields. VMR's clients have not included tobacco or alcohol companies.

This report is based on industry-standard data sources and methods that are available to advertising agencies and advertisers as they make their decisions about where to place their advertising. Audience data came from GfK MRI, the leading industry source for magazine readership demographics. GfK MRI is a subsidiary of GfK, the world's fourth largest market research company. Advertising occurrence and expenditure data came from The Nielsen Company. Minor differences between data given here and in previous CAMY magazine reports exist because the latter relied on occurrence and expenditure data from TNS Media Intelligence (formerly CMR or Competitive Media Reporting). The report covers an estimated 83 percent of all alcohol advertising placed in magazines during this period, due to the data limitations of the two sources. CAMY classifies advertising as product, "responsibility,"[§] corporate, or sponsorship/event promotion; this report covers only advertising for which the primary message was product-related, specifically, youth exposure to alcohol product advertising. It does not attempt to document or analyze the effects of the content of that advertising, including whether the content meets the standards set in the alcohol industry's voluntary codes of good marketing practice.

In recent years, alcohol marketers have placed advertising in so-called "demographic editions" of publications for which the "full run" editions have significant youth audiences. These editions of *Spin*, *Vibe*, *Sports Illustrated*, *ESPN The Magazine*, *Rolling Stone* and *Jane* have typically been sent to qualifying subscriber age 21 and older. The specific criteria for these editions vary by publication. Since audience data are not available for these demographic editions, this CAMY report does not report on advertising in them. It is also important to note that some magazines referenced in this report, including some with demographic editions, are no longer being published.

The measures in this report are standard to the advertising research field but may not be familiar to the general reader. Because audiences for advertising vary widely, the number of advertisements is the least reliable means of estimating audience exposure. Spending can function as a rough proxy for audience exposure, but the most accurate calculations of exposure rely on consumer surveys (such as those by GfK MRI used in this report) to determine actual readership of magazines in which alcohol advertising was placed. Data from these surveys yield estimates of the following advertising industry-standard measures: "Reach" refers to the number or percentage of a target population that has the opportunity to see an advertisement or a campaign through exposure to selected media. "Frequency" refers to the number of times individuals are exposed to an advertisement or campaign and is most often expressed as an average number of exposures. "Gross rating points" (GRPs) combine reach and frequency to measure advertising exposure among a particular population on a per capita basis. For example, the measure of 100 GRPs indicates that the population received the equivalent of one exposure per person (although this also could have come from 50 percent of the population seeing the advertising two times). GRPs are the mathematical product of reach and frequency: If the reach is 80 percent and the average frequency is 2.5, then the GRPs total 200. GRPs thus provide a comparative measure of per capita advertising exposure.

Further information on sources and methodology may be found in Appendix A. Appendix B provides a glossary of advertising research terminology used in this report.

[§] 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.

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Susan Gill Weiss, principal, Kanban Consulting marketing and media research consultancy; former senior consultant and director of Electronic Media Sales, Mediamark Research Inc.

Michael B. Siegel, MD, MPH, associate chairman and professor, Community Health Sciences, Boston University School of Public Health.

I. Youth Exposure to Alcohol Advertising in Magazines, 2001-2008

Over nine years, from 2001 to 2008, alcohol companies spent \$2.7 billion to place 29,026 product advertisements in national magazines in the U.S. As Table 1 shows, distilled spirits marketers were by far the largest spenders and placed the greatest number of advertisements.

Table 1: Alcohol Advertisements and Spending in National Magazines, 2001-2008

Year	Beer and Ale		Spirits		Alcopops**		Wine		Total	
	Ads	Spending	Ads	Spending	Ads	Spending	Ads	Spending	Ads	Spending
2001	245	\$24,976,300	2,742	\$240,349,300	61	\$5,576,100	397	\$25,501,300	3,445	\$296,403,000
2002	264	\$29,851,000	2,656	\$245,354,900	92	\$9,430,500	457	\$33,463,200	3,469	\$318,099,600
2003	376	\$43,438,500	2,472	\$222,079,600	27	\$2,787,600	819	\$41,624,600	3,694	\$309,930,300
2004	465	\$58,700,700	2,527	\$234,078,500	85	\$10,586,900	837	\$49,023,500	3,914	\$352,389,600
2005	583	\$75,460,100	2,317	\$208,034,600	22	\$1,913,400	794	\$49,139,400	3,716	\$334,547,500
2006	528	\$76,872,100	2,399	\$225,631,000	39	\$4,266,700	797	\$49,263,300	3,763	\$356,033,100
2007	553	\$74,739,500	2,534	\$269,886,100	59	\$4,662,400	766	\$48,479,100	3,912	\$397,767,100
2008	631	\$83,004,200	1,799	\$215,384,200	37	\$3,741,300	646	\$38,800,500	3,113	\$340,930,200
TOTALS	3,645	\$467,042,400	19,446	\$1,860,798,200	422	\$42,964,900	5,513	\$335,294,900	29,026	\$2,706,100,400
2001-2008 % change	157.6%	232.3%	-34.4%	-10.4%	39.3%	-32.9%	62.7%	52.2%	-9.6%	15.0%

Sources: The Nielsen Company, GfK MRI

Over the course of this period, distilled spirits marketers were shifting their advertising spending away from magazines and toward other media, notably television.¹⁷ Consequently, as Table 2 shows, exposure to alcohol advertising in magazines for all age groups declined from 2001 to 2008, with the greatest percentage decline occurring among youth.

** This report follows industry convention in categorizing alcoholic beverages. "Alcopops" are also referred to as "low-alcohol refreshers," "malternatives," "flavored malt beverages" or "ready-to-drink flavored alcoholic beverages." Many of the brands in this category, which includes Mike's Hard Lemonade and Smirnoff Ice, have alcohol contents of between 4 percent and 6 percent, similar to most traditional malt beverages. (Alcohol and Tobacco Tax and Trade Bureau [TTB], "Notice No. 4-Flavored Malt Beverages and Related Proposals," *Federal Register* [24 March 2003]: 14293.)

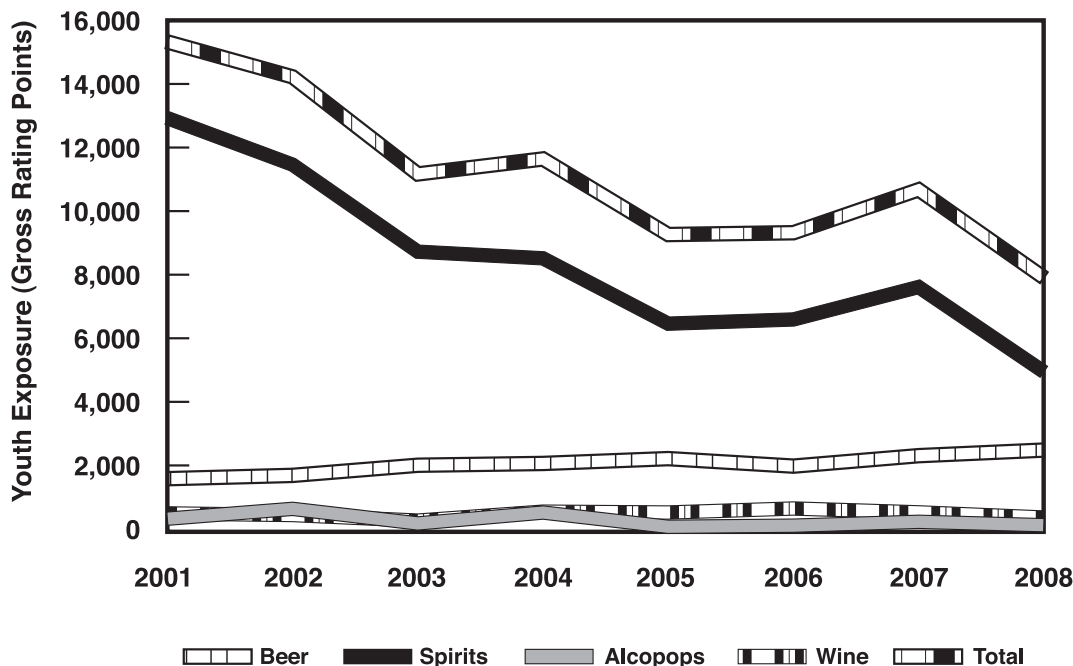
Table 2: Magazine Reach, Frequency and GRPs by Beverage Type, 2001-2008

2001															
Beverage Type	Youth Ages 12-20			Young Adults Ages 21-34			Adults Ages 21-49			Adults Age 21+			Adults Age 35+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	79%	20.0	1,583	83%	21.2	1,760	84%	23.8	2,009	78%	13.2	1,034	65%	11.6	762
Distilled Spirits	93%	139.1	12,926	97%	159.1	15,473	96%	191.1	18,349	96%	101.4	9,754	91%	84.1	7,615
Alcopops	57%	5.7	324	59%	6.7	392	61%	6.9	420	51%	4.0	205	34%	4.0	135
Wine	52%	9.4	491	72%	16.4	1,177	72%	27.2	1,965	72%	18.4	1,320	67%	20.5	1,374
Total	93%	163.9	15,323	98%	192.0	18,802	97%	234.3	22,743	97%	126.9	12,314	92%	107.1	9,886
2002															
Beverage Type	Youth Ages 12-20			Young Adults Ages 21-34			Adults Ages 21-49			Adults Age 21+			Adults Age 35+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	78%	21.7	1,687	83%	22.6	1,885	78%	27.1	2,122	69%	15.4	1,072	63%	12.1	767
Distilled Spirits	92%	125.0	11,462	98%	151.3	14,781	97%	182.4	17,609	93%	99.8	9,286	90%	80.0	7,226
Alcopops	65%	9.8	634	70%	10.5	736	59%	13.3	780	46%	8.1	370	36%	6.4	232
Wine	43%	10.3	440	72%	19.2	1,380	72%	31.6	2,285	69%	21.3	1,460	67%	22.2	1,491
Total	92%	154.1	14,223	98%	190.8	18,782	98%	233.5	22,796	95%	128.7	12,188	93%	105.0	9,715
2003															
Beverage Type	Youth Ages 12-20			Young Adults Ages 21-34			Adults Ages 21-49			Adults Age 21+			Adults Age 35+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	77%	26.2	2,006	83%	27.6	2,300	80%	32.0	2,548	77%	17.4	1,335	73%	13.3	972
Distilled Spirits	90%	97.4	8,724	96%	121.2	11,696	95%	146.6	13,917	91%	82.5	7,479	87%	67.4	5,891
Alcopops	51%	3.4	175	52%	3.8	197	41%	4.9	203	30%	3.2	96	22%	2.6	58
Wine	36%	7.4	264	62%	21.8	1,353	63%	37.1	2,339	61%	24.6	1,492	60%	25.7	1,545
Total	90%	123.6	11,169	97%	159.8	15,546	96%	197.7	19,007	94%	110.7	10,403	92%	92.3	8,466
2004															
Beverage Type	Youth Ages 12-20			Young Adults Ages 21-34			Adults Ages 21-49			Adults Age 21+			Adults Age 35+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	79%	26.1	2,062	89%	31.3	2,770	85%	38.5	3,273	82%	21.3	1,748	79%	17.3	1,366
Distilled Spirits	90%	94.5	8,515	97%	116.2	11,242	95%	149.7	14,263	92%	83.7	7,682	89%	71.3	6,352
Alcopops	61%	8.4	518	72%	8.6	622	66%	11.3	737	57%	6.5	369	51%	5.4	275
Wine	55%	10.0	546	74%	22.3	1,644	73%	39.3	2,880	70%	26.9	1,877	68%	28.7	1,965
Total	92%	126.9	11,641	98%	166.1	16,276	97%	217.8	21,153	96%	122.1	11,676	94%	105.8	9,957
2005															
Beverage Type	Youth Ages 12-20			Young Adults Ages 21-34			Adults Ages 21-49			Adults Age 21+			Adults Age 35+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	80%	27.5	2,214	92%	35.0	3,232	89%	42.6	3,801	85%	23.7	2,016	81%	19.3	1,567
Distilled Spirits	88%	73.3	6,459	97%	101.8	9,904	96%	126.1	12,068	92%	70.5	6,468	89%	58.5	5,198
Alcopops	28%	2.5	70	39%	2.7	106	32%	3.7	118	26%	2.3	57	21%	1.9	39
Wine	57%	9.2	519	78%	20.3	1,589	76%	33.3	2,534	72%	23.3	1,678	70%	24.5	1,711
Total	90%	102.7	9,263	99%	150.5	14,832	98%	189.9	18,521	96%	106.7	10,220	94%	90.8	8,515
2006															
Beverage Type	Youth Ages 12-20			Young Adults Ages 21-34			Adults Ages 21-49			Adults Age 21+			Adults Age 35+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	73%	27.0	1,978	86%	30.0	2,566	81%	38.8	3,149	79%	21.4	1,701	76%	18.2	1,384
Distilled Spirits	88%	75.2	6,592	96%	100.8	9,722	95%	128.4	12,190	91%	71.4	6,493	88%	60.2	5,311
Alcopops	27%	3.9	105	37%	4.1	153	31%	5.7	179	24%	3.7	88	19%	3.4	65
Wine	59%	10.9	645	81%	20.4	1,655	80%	32.9	2,618	75%	22.1	1,665	73%	23.0	1,669
Total	89%	104.7	9,320	98%	144.4	14,096	97%	187.4	18,135	95%	104.5	9,948	94%	90.0	8,429
2007															
Beverage Type	Youth Ages 12-20			Young Adults Ages 21-34			Adults Ages 21-49			Adults Age 21+			Adults Age 35+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	74%	31.1	2,307	86%	35.0	3,012	83%	43.9	3,632	81%	22.7	1,837	78%	18.2	1,411
Distilled Spirits	88%	86.4	7,613	98%	110.9	10,831	96%	143.0	13,736	91%	78.6	7,187	88%	66.7	5,866
Alcopops	44%	5.2	227	56%	5.8	322	49%	8.1	393	39%	4.9	193	33%	4.4	146
Wine	54%	9.7	524	77%	19.3	1,476	78%	31.5	2,445	75%	21.5	1,611	74%	22.3	1,660
Total	90%	118.2	10,672	99%	158.6	15,641	98%	206.5	20,205	96%	112.3	10,828	95%	95.8	9,082
2008															
Beverage Type	Youth Ages 12-20			Young Adults Ages 21-34			Adults Ages 21-49			Adults Age 21+			Adults Age 35+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	82%	30.3	2,483	94%	39.3	3,704	91%	49.8	4,540	83%	27.2	2,267	78%	22.4	1,753
Distilled Spirits	86%	57.7	4,945	97%	80.2	7,797	95%	102.5	9,738	89%	56.4	5,035	85%	47.6	4,047
Alcopops	34%	3.5	120	45%	4.0	180	39%	5.5	214	30%	3.5	103	24%	3.1	76
Wine	50%	7.2	361	73%	17.2	1,256	71%	29.9	2,129	66%	20.2	1,329	63%	21.6	1,355
Total	89%	89.1	7,908	98%	131.6	12,937	97%	171.2	16,621	93%	93.5	8,735	91%	79.9	7,232

Sources: The Nielsen Company, GfK MRI

As Figure 1 shows, from 2001 to 2008 youth exposure to spirits advertising in magazines fell while youth exposure to beer advertising exposure increased. Youth exposure to magazine advertising for alcopops peaked in 2002, while youth exposure to magazine advertising for wine reached its high point in 2006.

Figure 1: Youth Exposure to Alcohol Advertising in Magazines by Beverage Type, 2001-2008



Sources: The Nielsen Company, GfK MRI

II. Youth Exposure and Industry Self-regulatory Standards

By September of 2003, the three major alcohol industry trade associations—the Beer Institute, the Distilled Spirits Council of the United States and the Wine Institute—had all adopted 30 percent as the maximum permissible underage audience composition for alcohol advertising placements. Because magazine audiences are generally measured only for ages 12 and above, the 30 percent standard is not proportional to the magazine population, where youth ages 12 to 20 represent 15.1 percent of the population age 12 and above.^{††} The U.S. surgeon general has endorsed the concept of proportionality for alcohol advertising placements,¹⁸ and the National Research Council and Institute of Medicine¹⁴ and 20 state attorneys general¹⁵ have recommended exploration of a 15 percent standard, based on the population ages 12 to 20.

In magazines, alcohol companies have nearly all met the revised 30 percent standard. By 2008, only three ads—all for Hypnotiq liqueur, and all published in *Allure* magazine, with a 12-to-20 composition of 35.1 percent—breached the 30 percent threshold. However, as the industry moved its advertising to publications below 30 percent, the proportion of youth exposure generated by advertisements placed in magazines with youth audience compositions between 15 percent and 30 percent increased. As Table 3 shows, in 2001 69.4 percent of youth advertising exposure came from magazines with between 15 percent and 30 percent youth audience composition; in 2008, that amount grew to 78.4 percent of total youth exposure.

^{††} For the published data sources used in this report, for 2008 the age 12-20 population of 37,816,000 is 15.1 percent of the ages 12+ population universe of 249,826,000. See Appendix A for a description of sources and methods.

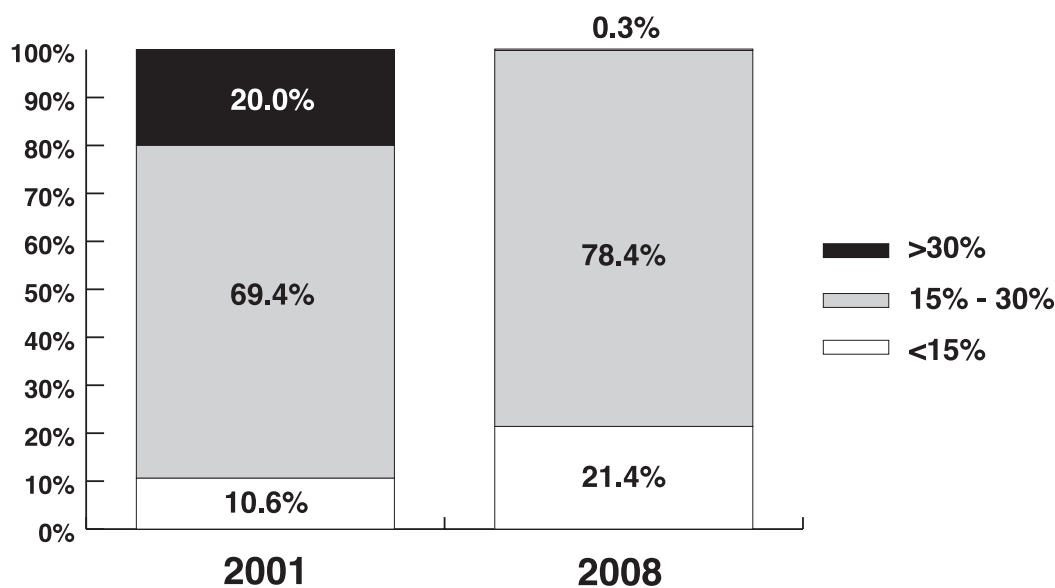
Table 3: Number and Percent of Alcohol Advertisements and Youth Exposure (Gross Rating Points) by Youth Readership, 2001-2008

Year	Total No. of Alcohol Advertisements	No. and % of Alcohol Advertisements in Magazines				Total Age 12-20 GRPs	Age 12-20 GRPs			
		>15% - 30%		>30%			>15% - 30%		>30%	
		No.	%	No.	%		No.	%	No.	%
2001	3,445	1,398	40.6%	352	10.2%	15,323	10,630	69.4%	3,063	20.0%
2002	3,469	1,433	41.3%	375	10.8%	14,223	8,911	62.7%	3,536	24.9%
2003	3,694	1,201	32.5%	213	5.8%	11,169	7,975	71.4%	1,706	15.3%
2004	3,914	1,277	32.6%	135	3.4%	11,641	8,963	77.0%	711	6.1%
2005	3,716	1,329	35.8%	64	1.7%	9,263	7,220	77.9%	536	5.8%
2006	3,763	1,270	33.7%	46	1.2%	9,320	7,410	79.5%	371	4.0%
2007	3,912	1,463	37.4%	37	0.9%	10,672	8,862	83.0%	281	2.6%
2008	3,113	997	32.0%	3	0.1%	7,908	6,198	78.4%	20	0.3%

Sources: The Nielsen Company, GfK MRI

Figure 2 further illustrates the effect of the 30 percent standard. By 2008, the 20 percent of youth exposure that was attributable to advertising in magazines with more than 30 percent youth audience compositions in 2001 was split almost evenly between magazines with less than 15 percent youth composition and those with 15 percent to 30 percent youth composition.

Figure 2: Percent of Youth Exposure Falling Between Youth Audience Thresholds, 2001 and 2008



Sources: The Nielsen Company, GfK MRI

From 2001 to 2008, the 30 percent threshold applied to nine magazines out of the 160 national publications with alcohol advertising monitored by this report. The dark gray cells in Table 4 show youth audience composition, number of alcohol advertisements placed, and youth gross rating points generated by publications with youth readerships exceeding 30 percent. As the light gray cells demonstrate, youth audience compositions for some of these magazines declined to 30 percent or lower during the eight-year period monitored, permitting alcohol advertisers to continue using them. As a result, the percentage of youth exposure coming from these publications actually increased from 23 percent in 2001 to 30 percent in 2008.

Table 4: Publications with Youth Audiences Exceeding 30 Percent at Any Time Between 2001 and 2008

Publication	2001			2002			2003			2004			2005			2006			2007			2008		
	12-20 Composition	12-20 Ads	12-20 GRPs	12-20 Composition	12-20 Ads	12-20 GRPs	12-20 Composition	12-20 Ads	12-20 GRPs	12-20 Composition	12-20 Ads	12-20 GRPs	12-20 Composition	12-20 Ads	12-20 GRPs	12-20 Composition	12-20 Ads	12-20 GRPs	12-20 Composition	12-20 Ads	12-20 GRPs			
Allure	33.8%	8	41	36.3%	7	38	31.5%	9	41	33.4%	2	10	30.3%	2	10	29.7%	-	-	30.6%	-	-	35.1%	3	20
Automobile	10.0%	-	-	10.3%	-	-	33.2%	6	23	28.4%	2	7	28.7%	-	-	23.2%	1	3	22.6%	2	6	20.6%	-	-
ESPN The Magazine	16.0%	125	529	30.8%	126	1,318	31.3%	71	787	30.0%	19	216	27.1%	22	241	27.1%	84	890	27.6%	83	1,044	28.3%	68	856
Jane	N/A	N/A	N/A	20.3%	48	48	18.7%	35	31	32.5%	57	98	29.2%	10	17	28.7%	9	12	N/A	N/A	N/A	N/A	N/A	N/A
Marie Claire	33.9%	41	154	29.2%	31	89	23.8%	29	74	19.5%	3	6	20.9%	11	24	23.0%	20	44	21.3%	29	69	18.2%	22	44
Rolling Stone	34.6%	182	2,134	31.2%	128	1,417	29.7%	101	1,000	29.7%	89	885	26.8%	76	675	24.9%	122	1,046	25.3%	145	1,414	24.8%	119	1,060
Spin	39.2%	75	266	34.6%	55	183	35.1%	47	131	32.8%	9	21	22.2%	20	31	26.5%	18	28	18.6%	73	88	20.4%	88	101
The Source	29.7%	-	-	46.1%	-	-	45.1%	7	79	42.9%	4	35	28.4%	3	14	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Vibe	41.1%	46	468	37.7%	59	580	38.9%	73	645	37.4%	63	547	32.3%	62	526	31.5%	46	371	31.0%	37	281	29.9%	47	315
9 Magazine Subtotal		477	3,592		454	3,673		378	2,811		248	1,835		206	1,540		300	2,394		369	2,902		347	2,395
% of Total		13.8%	23.4%		13.1%	25.8%		10.2%	25.2%		6.3%	15.8%		5.5%	16.6%		8.0%	25.7%		9.4%	27.2%		11.1%	30.3%
Alcohol Total		3,445	15,323		3,469	14,223		3,694	11,169		3,914	11,641		3,716	9,264		3,763	9,320		3,912	10,672		3,113	7,908

N/A = publication not published or measured

Publication >30% 12-20 composition

Publication <30% 12-20 composition

Sources: The Nielsen Company, GfK MRI

III. Youth Overexposure

Youth overexposure occurs when companies place advertisements in publications with youth audiences that are larger, percentage-wise, than their presence in the general population. In such cases, the gross rating points generated for youth by an advertisement exceed the gross rating points generated for adults age 21 and above. Because the youth proportion of the population measured for magazines between 2001 and 2008 ranged from 15.2 percent to 15.8 percent, most of the advertising placed in magazines with greater than 15 percent youth audience compositions also overexposed youth relative to adults of the legal drinking age 21 or above.

Half (50 percent) of the industry's spending in magazines from 2001 to 2008 went to overexposing advertisements. In 2008, 44 percent of industry spending paid for advertisements that youth were more likely to see per capita than adults. These advertisements generated 74 percent of youth exposure in 2008.

As Table 5 shows, beer and alcopops advertising consistently overexposed youth from 2001 to 2008. At times, spirits advertising exposed youth nearly as much as it exposed adults who could legally purchase alcohol, but the aggregate figures mask the performance of individual spirits brands, some of which have consistently overexposed youth. In contrast, wine advertising in magazines consistently and substantially underexposed youth.

Table 5: Exposure to Alcohol Advertising in Magazines by Age Group and Beverage Type, 2001-2008

Year	Beer GRPs						Spirits GRPs					
	Ages 12-20	Age 21+	Ages 21-34	Age 35+	12-20/21+ Ratio	12-20/21-34 Ratio	Ages 12-20	Age 21+	Ages 21-34	Age 35+	12-20/21+ Ratio	12-20/21-34 Ratio
	2001	1,583	1,034	1,760	762	1.53	0.90	12,926	9,754	15,473	7,615	1.33
2002	1,687	1,072	1,885	767	1.57	0.90	11,462	9,286	14,781	7,226	1.23	0.78
2003	2,006	1,335	2,300	972	1.50	0.87	8,724	7,479	11,696	5,891	1.17	0.75
2004	2,062	1,748	2,770	1,366	1.18	0.74	8,515	7,682	11,242	6,352	1.11	0.76
2005	2,214	2,016	3,232	1,567	1.10	0.69	6,459	6,468	9,904	5,198	1.00	0.65
2006	1,978	1,701	2,566	1,384	1.16	0.77	6,592	6,493	9,722	5,311	1.02	0.68
2007	2,307	1,837	3,012	1,411	1.26	0.77	7,613	7,187	10,831	5,866	1.06	0.70
2008	2,483	2,267	3,704	1,753	1.10	0.67	4,945	5,035	7,797	4,047	0.98	0.63

Year	Alcopops GRPs						Wine GRPs					
	Ages 12-20	Age 21+	Ages 21-34	Age 35+	12-20/21+ Ratio	12-20/21-34 Ratio	Ages 12-20	Age 21+	Ages 21-34	Age 35+	12-20/21+ Ratio	12-20/21-34 Ratio
	2001	324	205	392	135	1.58	0.83	491	1,320	1,177	1,374	0.37
2002	634	370	736	232	1.71	0.86	440	1,460	1,380	1,491	0.30	0.32
2003	175	96	197	58	1.83	0.89	264	1,492	1,353	1,545	0.18	0.19
2004	518	369	622	275	1.40	0.83	546	1,877	1,644	1,965	0.29	0.33
2005	70	57	106	39	1.23	0.66	519	1,678	1,589	1,711	0.31	0.33
2006	105	88	153	65	1.18	0.68	645	1,665	1,655	1,669	0.39	0.39
2007	227	193	322	146	1.18	0.71	524	1,611	1,476	1,660	0.33	0.36
2008	120	103	180	76	1.16	0.67	361	1,329	1,256	1,355	0.27	0.29

Sources: The Nielsen Company, GfK MRI

IV. Youth Exposure and Overexposure by Brand

Aggregating exposure figures at the level of alcoholic beverage types obscures the large differences in advertising placement practices by brand. Advertising decisions are made by marketers for individual brands; to understand youth exposure and overexposure to alcohol advertising, it is critical to examine exposure by specific brands. As Table 6 shows, of the 325 alcohol brands advertising in magazines, just 16 (5 percent) were responsible for more than half of the youth exposure generated in publications exceeding 15 percent youth audience compositions; 40 brands (12 percent of the 325 alcohol brands advertising) generated 80 percent of the youth exposure to alcohol advertising in magazines with youth compositions greater than 15 percent.

Most of the 16 leading brands had advertising schedules that were clearly skewed toward younger audiences. Fourteen of the brands more effectively exposed youth ages 12 to 20 to their advertising, per capita, than they did adults age 21 and above.

Table 6: Leading Alcohol Brands Advertising in Magazines with Greater Than 15 Percent Youth Audience Compositions, 2008

Brand	Exposure in Publications With >15% Age 12-20 Composition			Total Exposure		
	Age 12-20 GRPs	% of 12-20 GRPs (>15% Comp)	Cumulative % of 12-20 GRPs (>15% Comp)	Age 12-20 GRPs	Ages 21+ GRPs	12-20/ 21+ Ratio
Patron Silver Tequila	549	8.8%	8.8%	658	681	0.97
Absolut Vodka	310	5.0%	13.8%	388	305	1.27
Kahlua Liqueurs	285	4.6%	18.4%	304	271	1.12
Ketel One Vodka	219	3.5%	21.9%	296	344	0.86
Jim Beam Bourbon Whiskey	215	3.5%	25.4%	217	122	1.79
Bud Light Lime	185	3.0%	28.4%	205	167	1.23
Heineken Beer	180	2.9%	31.3%	187	112	1.66
Jack Daniel's Whiskey	161	2.6%	33.8%	189	159	1.19
Corona Extra Beer	153	2.5%	36.3%	182	139	1.31
Paul Masson Grande Amber Brandy	151	2.4%	38.7%	154	93	1.65
Miller Chill	147	2.4%	41.1%	162	139	1.17
Budweiser Beer	141	2.3%	43.4%	162	160	1.01
Miller Genuine Draft	134	2.2%	45.5%	135	89	1.52
Modelo Especial Beer	120	1.9%	47.5%	144	110	1.30
Coors Light	119	1.9%	49.4%	119	86	1.39
Miller Lite	115	1.9%	51.2%	132	106	1.25

Sources: The Nielsen Company, GfK MRI

V. Conclusion

Evidence that exposure to alcohol advertising influences young people's drinking behavior is steadily growing. In magazines, alcohol companies have almost universally met the self-regulatory standard they set in 2003 for maximum youth audience composition of media in which they would place their advertising. However, these standards precluded advertising in only nine of the 160 magazines used by alcohol companies between 2001 and 2008. Compliance with the 30 percent standard left 25 magazines with youth audience compositions above 15 percent. Advertisements placed in these 25 magazines accounted for 78 percent of youth exposure to alcohol advertising in magazines in 2008.

Sixteen alcohol brands (5 percent of the 325 alcohol brands advertising in magazines in 2008) generated more than half of the youth exposure in these 25 magazines. The phenomenon of a small number of alcohol brands driving youth overexposure points to the sensitivity of youth exposure to advertising practices at the brand level, and to the importance of changing brand advertising practices if youth exposure is to be further reduced.

While total youth exposure to alcohol advertising in magazines has declined, overexposure is still common, and overexposing ad placements account for the majority of youth exposure to alcohol advertising. Stricter standards are needed to protect youth from the risks posed to them by exposure to advertising for alcoholic beverages.

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Appendix A: Methodology

1. Magazine Sources

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

- The Nielsen Company provides occurrence-specific information for each magazine advertising placement. See “Counting Magazine Advertisements” below.
- GfK Mediamark Research and Intelligence (GfK MRI) provides demographic audience impressions and ratings that are associated with each ad occurrence. See “Measuring Magazine Audiences” below.
- Impact Databank, a market research firm serving the alcoholic beverage industry, provides industry-accepted classifications for all brands of alcoholic beverages.

2. Counting Magazine Advertisements

Advertising occurrence data from The Nielsen Company were used to identify brand advertising by publication and date. (Previous CAMY magazine reports used TNS Media Intelligence [TNS], formerly CMR or Competitive Media Reporting.) The Nielsen Company, which measures more than 200 consumer magazines, in addition to television and other media, is an advertising-industry standard reference.

In changing from TNS to Nielsen, CAMY sought to establish a consistent reporting source for advertising occurrences where possible. As part of the due diligence on this change, CAMY compared the number of publications measured and ad placements tracked. Nielsen provides more magazines and ad placements for the period under study, which in turn provides a more comprehensive analysis of youth exposure to alcohol advertising.

Only alcoholic beverage product advertising in national or full editions of publications, as measured by GfK MRI, is reported by Nielsen and included in this report. Non-product advertising was not included; all ads were reviewed and classified as product, “responsibility,” sponsorship or corporate advertising based on the primary message of each advertisement. GfK MRI is the leading source of U.S. magazine audience estimates for consumer advertising. Advertising in demographic and regional editions of magazines has historically been omitted from CAMY reports because it is not practical to assign a national audience estimate to advertisements appearing in only a portion of a magazine’s circulation; The Nielsen Company generally does not report advertising in less than full-run editions.

3. Measuring Magazine Audiences

A. Sources of Magazine Audience Data

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

2001 Advertising Occurrences

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

2002 Advertising Occurrences

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

2003 Advertising Occurrences

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

2004 Advertising Occurrences

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

2005 Advertising Occurrences

- For persons age 18 and over: Adult Study, Spring 2006 (representing surveys from March 2005 through March 2006)
- For teens ages 12 to 17: TwelvePlus, 2005 (representing surveys from the summers of 2004 and 2005)

2006 Advertising Occurrences

- For persons age 18 and over: Adult Study, Spring 2007 (representing surveys from March 2006 through March 2007)
- For teens ages 12 to 17: TwelvePlus, 2006 (representing surveys from the summers of 2005 and 2006)

2007 Advertising Occurrences

- For persons age 18 and over: Adult Study, Spring 2008 (representing surveys from March 2007 through March 2008)
- For teens ages 12 to 17: TwelvePlus, 2007 (representing surveys from the summers of 2006 and 2007)

2008 Advertising Occurrences

- For persons age 18 and over: Adult Study, Spring 2009 (representing surveys from March 2008 through March 2009)
- For teens ages 12 to 17: TwelvePlus, 2008 (representing surveys from the summers of 2007 and 2008)

Note on Magazine Readership Methodology

Three MRI studies—the Spring Adult Study, Teenmark and TwelvePlus—all measure for ages 18 to 19; this report used the more widely accepted Spring Adult Study as its source for ages 18 to 19.

GfK MRI employs two methodologies for its magazine audience estimates. The adult survey methodology, which CAMY uses for persons age 18+, uses a “recent reading” (RR) technique as part of a personal interview, which identifies readers in the average issue of each publication by asking those respondents who have read or looked into any issue of the publication in the last six months whether they have read or looked into any issue of the publication in the last week, two weeks, or 30 days, depending on the specific publication interval.

For readers ages 12-17, GfK MRI uses a household sample drawn from the adult survey, which employs a mailed questionnaire that includes a recent reading question and a “Frequency of Reading” (FOR) question for all measured publications. In the teen surveys, respondents indicate how many issues they have read (out of an average four). Teen audience estimates are based on the sum of weighted responses to the FOR questions. In effect, teen respondents who claim to read one out of four issues have a probability weight of approximately .25, teens who claim to read two out of four issues have a weight of approximately .50, etc. The weights are adjusted slightly based on the relationship between RR and FOR estimates in the GfK MRI adult studies.

CAMY uses the GfK MRI readership estimates for ages 12-17 from the teen studies, and for all readers age 18 and older from the Spring Adult studies. The two surveys represent differing methodologies, a common feature of advertiser-supported media surveys, but they are also the most commonly accepted and used magazine audience surveys for their respective markets. GfK MRI itself combines the results of these two methodologies in its TwelvePlus reports. In addition to differences in methodology, the adult surveys provide audience estimates for a more extensive roster of publications than do the teen surveys. Approximately 207 magazines are reported in the age 18+ surveys; roughly 80 publications have reported audiences for ages 12-17.

To assess the impact of the two different methodologies on estimating youth readership, Virtual Media Resources compared the age 18-19 audience ratings for the 31 publications with alcohol advertising between 2001 and 2005 for which GfK MRI provided audience data using both methodologies. For 26 of the 31 publications, the reported age 18-19 rating using the adult (RR)

method was higher than that reported using the teen (FOR) method. The 10 publications with the highest reported alcohol advertising expenditures over the five-year period all had higher age 18-19 readerships using the adult (RR) than the teen (FOR) methodology. Given the potential instability caused by examining such a small population segment, it is more reliable to average results for each publication over several years. In looking at the data over a six-year period (2001-2005), estimates for ages 18-19 readerships averaged 36 percent higher for the 10 publications with the highest reported alcohol advertising expenditures, and 25 percent higher for all 31 publications.

From this analysis, it is reasonable to conclude that the ratios of youth versus adult exposure typically reported using GfK MRI data are conservative. The likely effect of the different measurement methodologies is to understate the youth ages 12-20 audience relative to adults, and thus a comparable readership methodology for all ages would very likely produce higher youth audience compositions and greater youth exposure relative to adults than are currently reported by GfK MRI.

B. Ad Exposure Measures

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

C. Reach Calculations

Audience reach estimates were calculated using GfK MRI's MEMRI print media evaluation applications and the GfK MRI Spring Adult, TwelvePlus and Teenmark Studies. GfK MRI is a provider of print media evaluation software as well as audience estimates.

4. Magazines and Advertisements Not Counted

Certain publications with significant alcohol advertising as tracked by The Nielsen Company are not currently measured by GfK MRI and were therefore not included in this analysis.

Publications for which audiences were not measured by GfK MRI are not included. Non-product advertising by alcohol marketers (ads for which the primary message is for “responsibility,” event sponsorship and corporate messaging) is not included. Ad spending for these messages represents 0.9 percent to 3.9 percent of total alcohol magazine expenditures by year.

This report is intended to capture the majority of magazine advertising for alcoholic beverages. As a leading source of advertising occurrence reporting, Nielsen captures advertising in leading U.S. magazines. In general, alcohol industry advertising guidelines preclude advertising in magazines for which audience estimates are not available.[¥] The total number of alcohol advertisements reported by Nielsen and the number of alcohol product ads that appeared in magazines with measured audiences are shown in Table 7.

[¥] See for example DISCUS 2009 Advertising Placement Guidelines available at http://www.discus.org/pdf/ENHANCED-EXPANDED_BUYING_GUIDELINES_EFF_1-01-09.pdf; the Beer Institute Advertising and Marketing Code at <http://www.beerinstitute.org/BeerInstitute/files/ccLibraryFiles/Filename/000000000384/2006ADCODE.pdf>; and the Wine Institute Code of Advertising Standards at <http://www.wineinstitute.org/initiatives/issuesandpolicy/adcode/details>.

Table 7: Magazines with Reported Alcohol Advertising and with Product Advertising and GfK MRI-measured Readership

Year	Total # of Alcohol Ads	Alcohol Product Ads in MRI-Measured Publications	Percent of Total Alcohol Ads
2001	4,741	3,445	72.7%
2002	4,670	3,469	74.3%
2003	4,289	3,694	86.1%
2004	4,488	3,914	87.2%
2005	4,172	3,716	89.1%
2006	4,257	3,763	88.4%
2007	4,643	3,912	84.3%
2008	3,624	3,113	85.9%
Total	34,884	29,026	83.2%

Sources: The Nielsen Company, GfK MRI

The majority (60 percent) of publications with alcohol product advertising do not have measured audiences for youth ages 12 to 17 (see Table 8). These publications account for the minority of reported expenditures, however (42 percent). For these publications, audience data are only available for ages 18 and older. Because this analysis is based only on published, industry-accepted survey data, we have not attempted to estimate the 12-to-17-year-old audiences for those publications (i.e., we assumed no exposure to 12-to-17-year-old audiences when there were no data available for that age group), although all may be presumed to have at least some readership under the age of 18.

Table 8: Publications, Ads and Ad Spending With and Without Measured Age 12-17 Audiences

GfK MRI-measured Publications with Alcohol Product Advertising

Year	Any Reported 12-17 Audience			No Reported 12-17 Audience			Total		
	# Pubs	# Ads	\$(millions)	# Pubs	# Ads	\$(millions)	# Pubs	# Ads	\$(millions)
2001	36	1,695	\$170.0	60	1,750	\$126.4	96	3,445	\$296.4
2002	36	1,620	\$180.8	70	1,849	\$137.3	106	3,469	\$318.1
2003	40	1,397	\$156.4	68	2,297	\$153.5	108	3,694	\$309.9
2004	50	1,858	\$211.5	63	2,056	\$140.9	113	3,914	\$352.4
2005	48	1,605	\$190.4	68	2,111	\$144.1	116	3,716	\$334.5
2006	44	1,766	\$219.9	67	1,997	\$136.2	111	3,763	\$356.0
2007	50	1,787	\$244.1	63	2,125	\$153.7	113	3,912	\$397.8
2008	43	1,393	\$209.3	60	1,720	\$131.6	103	3,113	\$340.9
Total	347	13,121	\$1,582.4	519	15,905	\$1,123.7	866	29,026	\$2,706.1

Sources: The Nielsen Company, GfK MRI

An unknown amount was spent on many publications that were not monitored by The Nielsen Company or measured by MRI for all eight years of advertising tracked in this report, such as *Blender* (advertising occurrence and age 18 and over audience data reported as of 2005; ceased print publication in 2009), *XXL*, *Smooth* and *King*.

5. Alcohol Category and Brand Classifications

Category and brand classifications were drawn from the *IMPACT Databank Review and Forecast*, industry references for the beer, wine and spirits markets published by M. Shanken Communications Inc., so that the categories and brands represented in this report would be consistent with the classifications used by the industry. The industry itself is experiencing significant change, primarily in the relatively new alcopop or “malternative” beverages, which are derived from a complex production process involving a malt base that is stripped of its malt characteristics, including much of its alcohol, and then augmented with flavorings and sweeteners, including flavorings that contain distilled alcohol. These are frequently marketed through joint agreements between distillers and brewers and have been grouped by *Impact* in recent years either as “low-alcohol refreshers” (2002) or as “ready-to-drink flavored alcoholic beverages” (2003-2009).^{§§}

^{§§} Each book covers the market for the previous year. For 2003-2005, the category is defined as “low-proof refreshers (not over 7 percent alcohol), primarily single-serve items.” M. Shanken Communications, *The U.S. Beer Market: Impact Databank Review and Forecast*, 2002 ed. (New York: M. Shanken Communications, 2002); M. Shanken Communications, *The U.S. Beer Market: Impact Databank Review and Forecast*, 2003 ed. (New York: M. Shanken Communications, 2003); M. Shanken Communications, *The U.S. Beer Market: Impact Databank Review and Forecast*, 2004 ed. (New York: M. Shanken Communications, 2004).

Appendix B: 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, as gleaned through advertising media research (see Appendix A), is called gross impressions—a term that describes all exposures, including repeat or multiple exposures to the advertising for some or all of the audience. 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. Using the example of a medium with an audience of 100,000 people, research may report that 20,000 are ages 12 to 20, and 80,000 are age 21+. In that case, the composition of the audience is calculated by looking at the percentage of the audience that meets different demographic criteria. In this example, the audience composition is 20 percent ages 12 to 20 and 80 percent age 21+ within a population universe of age 12 and above.

Composition Index

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

Magazine Circulation

This report makes use of publication readership data, which are based on audiences, not magazine circulation. Circulation refers to the number of copies purchased or distributed; audience refers to the average number of readers, typically 3 to 10 times greater than circulation.

Appendix C: Alcohol Advertisements by Publication by Year (Publications Sorted by Youth Age 12-20 Audience Composition)

Publication	Ads by Year									Age 12–20 Audience Composition *
	2001	2002	2003	2004	2005	2006	2007	2008	Total	
Greater than 30%										
<i>Allure</i>	8	7	9	2	2			3	31	35.1%
Greater than 15% and less than 30%										
<i>Vibe</i>	46	59	73	63	62	46	37	47	433	29.9%
<i>Jane</i>		48	35	57	10	9			159	28.7% * 2006
<i>The Source</i>			7	4	3				14	28.4% * 2005
<i>ESPN The Magazine</i>	125	126	71	19	22	84	83	68	598	28.3%
<i>Blender</i>					62	90	67	53	272	27.8%
<i>Elle</i>	37	28	3	4	4	12	32	29	149	26.6%
<i>Rolling Stone</i>	182	128	101	89	76	122	145	119	962	24.8%
<i>Vogue</i>	46	47	35	41	34	39	49	18	309	22.9%
<i>Stuff</i>		112	108	111	93	61			485	22.7% * 2006
<i>Automobile</i>	8	19	6	2		1	2		38	22.6% * 2007
<i>Details</i>						71	89	78	238	22.1%
<i>Glamour</i>	18	12	7	34	41	21	16		149	21.3% * 2007
<i>Cosmopolitan</i>	95	93	65	59	37	23	35	17	424	21.1%
<i>Latina</i>						11	5	2	18	20.8%
<i>Motorcyclist</i>							1		1	20.8% *2007
<i>Jet</i>	38	30	30	42	35	49	19	11	254	20.5%
<i>Spin</i>	75	55	47	9	20	18	73	88	385	20.4%
<i>Sports Illustrated</i>	178	175	155	130	86	112	117	110	1063	19.5%
<i>Skiing</i>	45	37	30	20	10	7	8	4	161	18.9%
<i>In Style</i>	111	107	60	63	44	62	68	35	550	18.9%
<i>Marie Claire</i>	41	31	29	3	11	20	29	22	186	18.2%
<i>Motor Trend</i>	4				4	4	4		16	17.9% * 2007
<i>Essence</i>	26	17	14	17	8	16	14	3	115	17.6%
<i>Sporting News</i>	46	37	63	63	72	72	36	35	424	17.6%
<i>FHM Magazine</i>		101	102	161	123	65			552	17.5% * 2006
<i>Car & Driver</i>	10	8	6	10	14	12	5	1	66	17.5%
<i>Premiere</i>	34	46	43	42	46	35			246	17.2% * 2006
<i>Us Weekly</i>	60	52	60	77	48	48	60	63	468	17.2%
<i>Ebony</i>	30	26	24	22	27	18	14	11	172	17.1%
<i>Star</i>				3	9	14	4		30	16.3% * 2007
<i>Soap Opera Weekly</i>							6		6	16.1% * 2007
<i>W Magazine</i>			45	30	26	29	37	15	182	16.1%
<i>Ski Magazine</i>	32	47	34	30	36	21	7	2	209	15.9%
<i>Maxim</i>	159	147	119	140	91	90	115	121	982	15.8%
<i>OK! Magazine</i>								27	27	15.1%
<i>People</i>	34	25	8	23	15	15	20	18	158	15.0%
Less than 15%										
<i>Road & Track</i>	7	1	4	2	3			1	18	14.3%
<i>Mens Fitness</i>	3	4	6	14	21	6	19	15	88	14.3%
<i>Modern Bride</i>				2	5		5	2	14	13.7%
<i>Brides</i>	4	1	1	4	4	2	3	2	21	13.6%
<i>Hot Rod</i>			2	8	2				12	15.8% * 2005
<i>Popular Science</i>	7	12	8	10	6		5	3	51	13.5%
<i>Prevention</i>		1	4	3	3				11	15.0% * 2005
<i>National Geographic</i>							3	1	4	13.5%
<i>In Touch</i>				10	10	14	21	29	84	13.3%
<i>Vanity Fair</i>	59	84	83	62	61	70	94	36	549	13.0%
<i>Self</i>	10	16	13	4	18	10	11	10	92	12.8%

* 2008 unless noted; otherwise most recent year in which alcohol advertising was placed, and in which the publication's audience was measured by MRI.

Publication	Ads by Year									Age 12-20 Audience Composition *	
	2001	2002	2003	2004	2005	2006	2007	2008	Total		
Less than 15% (continued)											
<i>Bridal Guide</i>	1	2	3						6	12.7%	* 2003
<i>Harpers Bazaar</i>	21	13	2	1	2	1	2	10	52	12.5%	
<i>Entertainment Weekly</i>	115	94	89	81	50	50	44	37	560	12.4%	
<i>Family Circle</i>					3				3	13.5%	* 2005
<i>People en Espanol</i>					8	21	16	10	55	12.0%	
<i>GQ</i>	131	136	127	107	100	136	143	74	954	11.9%	
<i>Yahoo! Internet Life</i>	49								49	11.4%	* 2001
<i>Shape</i>		4	1	7	26	8	6	12	64	10.5%	
<i>Time</i>	12	19	21	32	8	5	11	7	115	10.4%	
<i>Auto Week</i>					1				1	10.3%	* 2005
<i>Popular Mechanics</i>	15	15	16	17	10		5	4	82	10.1%	
<i>Esquire</i>	80	62	91	78	69	98	82	87	647	10.0%	
<i>Mens Health</i>		2	6	8	25	12	12	17	82	9.7%	
<i>Fitness</i>			1	4	11				16	11.4%	* 2005
<i>Mens Journal</i>	116	68	61	81	93	84	96	81	680	9.6%	
<i>US News&World Report</i>		2	2	1					5	9.2%	* 2004
<i>O, Oprah Magazine</i>		19	13	21	16		5	3	77	9.0%	
<i>Runners World</i>	3	3	4	5	6	9	6	6	42	8.9%	
<i>Playboy</i>	167	131	101	134	102	84	109	100	928	8.8%	
<i>Biography</i>	3	12	22						37	8.5%	* 2003
<i>TV Guide</i>						1			1	8.5%	* 2006
<i>Outside</i>	36	28	14	22	17	31	47	73	268	7.8%	
<i>Redbook</i>	1	8	2			1			12	7.5%	* 2006
<i>Newsweek</i>	10	5	1	1	2			11	30	7.3%	
<i>Nat'l Geographic Traveler</i>	2	5	9	9	10	8	4	5	52	7.2%	
<i>PC Magazine</i>	10	7	5	2					24	7.0%	* 2004
<i>Bicycling</i>		2	5	1	10	19	8		45	7.0%	* 2007
<i>Everyday Food</i>						8	7		15	6.9%	* 2007
<i>Country Weekly</i>		15							15	6.8%	* 2002
<i>Martha Stewart Living</i>	24	32	10	11	6	9	4		96	6.7%	* 2007
<i>Wired</i>			18	36	37	42	67	66	266	6.6%	
<i>Lucky</i>					34	27	31	7	99	6.6%	
<i>Bassmaster</i>		7	22	19	20	21	8	9	106	6.2%	
<i>Veranda</i>						4	3	4	11	6.2%	
<i>Real Simple</i>		9	7	22	14	16	18	13	99	6.2%	
<i>First For Women</i>							3		3	6.0%	* 2007
<i>Better Homes and Gardens</i>		3							3	5.6%	* 2002
<i>Outdoor Life</i>	21	17	5	10	2	1	3	8	67	5.6%	
<i>Discover</i>	11	6	8	3					28	5.5%	* 2004
<i>Penthouse</i>	11	5	4	4	21	27	26	12	110	5.2%	
<i>Weight Watchers</i>								1	1	5.2%	
<i>Health</i>	4				1			1	6	5.1%	
<i>Tennis</i>	14	5	7	3	7		3	1	40	5.1%	
<i>Scientific American</i>	9	8	6	3					26	4.9%	* 2004
<i>Southern Accents</i>	4								4	4.9%	* 2001
<i>Family Handyman</i>		6	2	2	2				12	5.5%	* 2005
<i>Nat'l Geographic Adventure</i>					20	21	34	11	86	4.8%	
<i>Endless Vacation</i>					4		2		6	4.7%	* 2007
<i>Spirit</i>	3					1		4	8	4.6%	
<i>Forbes</i>	71	48	37	31	40	57	49	44	377	4.6%	
<i>Black Enterprise</i>	32	32	35	31	36	43	28	35	272	4.6%	
<i>Barrons</i>	2	14							16	4.6%	* 2002
<i>Field & Stream</i>	25	28	21	30	17	15	17	11	164	4.4%	
<i>Continental</i>	3			1		1	1		6	4.4%	* 2007
<i>American Photo</i>	12	9	9	9	4	6	4		53	4.4%	* 2007
<i>Golf Digest</i>	26	34	38	26	31	29	26	26	236	4.3%	
<i>Sky Magazine</i>				5	9	13	19	14	60	4.3%	
<i>Womens Health</i>								5	5	4.1%	

* 2008 unless noted; otherwise most recent year in which alcohol advertising was placed, and in which the publication's audience was measured by MRI.

Publication	Ads by Year									Age 12-20 Audience Composition *
	2001	2002	2003	2004	2005	2006	2007	2008	Total	
Less than 15% (continued)										
<i>Cigar Aficionado</i>				127	152	156	169	128	732	4.1%
<i>Bon Appetit</i>	79	61	39	54	58	50	49	33	423	4.1%
<i>The New Yorker</i>	75	102	97	87	88	79	79	21	628	3.6%
<i>Entrepreneur</i>					4	4	2	2	12	3.6%
<i>Selecciones Reader's Digest</i>					2				2	4.3% * 2005
<i>Good Housekeeping</i>							3		3	3.5%
<i>Natural History</i>	6	9	6						21	3.5% * 2003
<i>US Airways Magazine</i>						3	2		5	3.5% * 2007
<i>Garden Design</i>						4		7	11	3.2%
<i>Money</i>	20	12	21	26	16	12	12	6	125	3.2%
<i>Ladies Home Journal</i>				1					1	3.2% * 2004
<i>Business Week</i>	22	34	49	67	80	43	44	1	340	3.1%
<i>Food & Wine</i>	140	157	124	141	147	147	162	194	1212	3.1%
<i>Travel Holiday</i>	3	1							4	2.9% * 2002
<i>Fortune</i>	54	43	45	64	48	42	22	18	336	2.8%
<i>Wine Spectator</i>			555	484	475	462	544	438	2958	2.8%
<i>Golf Magazine</i>	58	65	77	102	102	76	73	54	607	2.8%
<i>The Economist</i>						12	8	4	24	2.7%
<i>Victoria</i>	1								1	2.7% * 2001
<i>Gourmet</i>	43	57	78	57	76	82	63	44	500	2.5%
<i>Elle Décor</i>	15	11	14	15	15	9	10		89	2.5% * 2007
<i>Town & Country</i>	1	2	9	1	1	1		1	16	2.5%
<i>Smithsonian</i>	20	14	6	5	5		1		51	2.4% * 2007
<i>New York Magazine</i>	45	27	16	48	19	39	102	69	365	2.4%
<i>Metropolitan Home</i>	14	13	11	10	5	4		1	58	2.4%
<i>Cottage Living</i>							8		8	2.4% * 2007
<i>Country Living</i>					4	6	4	7	21	2.4%
<i>Traditional Home</i>			4	5		1	4	1	15	2.3%
<i>Attache</i>				3	5				8	2.2% * 2005
<i>Southern Living</i>	9	6	1	5	3	6	5		35	2.1% * 2007
<i>Coastal Living</i>		3	7	17	13	14	6	7	67	2.1%
<i>Sierra</i>							3	3	6	2.1%
<i>American Way</i>	3	2				2			7	2.1% * 2006
<i>Backpacker</i>		1	2	1	6	7	15	12	44	2.0%
<i>Inc.</i>	2	3	3	12	3	2	11	14	50	2.0%
<i>This Old House</i>	19	6	6			2		2	35	2.0%
<i>Country Home</i>				6	5	4	4	1	20	2.0%
<i>House & Garden</i>	19	16	21	11	5	8			80	1.8% * 2006
<i>Smart Money</i>	11	7	8	9	3	8	6	3	55	1.8%
<i>Golf World</i>		4	1	32	41	25	17	5	125	1.7%
<i>Cooking Light</i>	22	24	16	33	28	23	31	16	193	1.6%
<i>Architectural Digest</i>	10	16	17	18	19	24	27	13	144	1.5%
<i>NW World Traveler</i>		1					4	9	14	1.4%
<i>Sunset</i>	20	22	9	12	13	7	7	10	100	1.2%
<i>Midwest Living</i>		3	3	5	5	1	3		20	1.2% * 2007
<i>Atlantic Monthly</i>	19	7	15	13	8	6			68	1.2% * 2006
<i>Travel & Leisure</i>	50	51	49	42	26	29	28	29	304	1.2%
<i>House Beautiful</i>	3	3	3	2				3	14	1.1%
<i>Kiplingers Personal Finance</i>	6	1	7	5	5	1	1		26	0.8% * 2007
<i>Audubon</i>	1								1	0.6% * 2001
<i>AARP The Magazine</i>			4	6	5	6	4		25	0.5% * 2007
<i>Hemispheres</i>	1			3	5	5	9		23	0.5% * 2007
<i>More</i>							5	9	14	0.5%
<i>Conde Nast Traveler</i>	32	31	36	38	43	43	58	40	321	0.4%
Total	3,445	3,469	3,694	3,914	3,716	3,763	3,912	3,113	29,026	

* 2008 unless noted; otherwise most recent year in which alcohol advertising was placed, and in which the publication's audience was measured by MRI.
Sources: The Nielsen Company; GfK MRI
Occurrence and audience data based on full-run editions only.