

# IT CAN BE DONE: REDUCTIONS IN YOUTH EXPOSURE TO ALCOHOL ADVERTISING IN MAGAZINES, 2001–2005

## I. Executive Summary

From 2001 to 2005, youth<sup>1</sup> exposure to alcohol advertising in magazines fell by 49%,<sup>2</sup> according to an analysis conducted by the Center on Alcohol Marketing and Youth (CAMY) of 16,635 advertisements costing nearly \$1.7 billion. The largest year-to-year drop occurred between 2004 and 2005, when youth exposure fell by more than a quarter. Alcohol industry trade associations adopted a more restrictive standard for advertising placements in the fall of 2003, and by 2005 nearly all alcohol advertisements in magazines were placed in magazines with youth audience compositions lower than the industry standard. Major findings of CAMY's analysis included:

- Alcohol advertising in magazines declined overall, but youth exposure fell substantially more than adult exposure. From 2001 to 2005, youth exposure fell by 49%, while the number of alcohol advertisements placed per year fell by 20%, and adult exposure dropped by 30%. These drops reflect the trend of alcohol advertisers moving from magazines to television.
- Youth overexposure<sup>3</sup> to alcohol advertising in magazines also declined. For instance, youth overexposure to beer advertising peaked in 2002 when youth saw 57% more beer advertising in magazines than adults, but fell to only 7% more exposure in 2005. In 2005, youth also saw 19% more advertising for alcopops<sup>4</sup> per capita than adults, and slightly less advertising for distilled spirits than adult readers.
- Less than 1% of alcohol advertisements and alcohol advertising dollars in 2005 were directed to magazines exceeding the alcohol industry's voluntary standard of 30% maximum youth audience composition.
- Forty-four percent of advertisements and 50% of spending in 2005 were in magazines with youth audience compositions that exceeded 15%—roughly the proportion of youth ages 12 to 20 in the general age-12-and-above population.

<sup>1</sup> In this report, unless otherwise noted, youth are defined as persons ages 12 to 20, and adults are defined as persons age 21 and over.  
<sup>2</sup> 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 audience are exposed to advertising). Had exposure been measured by gross impressions alone, youth exposure would have fallen by 47% from 2001 to 2005, and adult exposure would have fallen by 25%. The adult population will almost always receive far more gross impressions than youth because there are far more adults in the population than youth. Gross rating points are calculated by dividing gross impressions by the relevant population (e.g., persons age 21 and over) and multiplying by 100. See Appendix B for a glossary of terms.  
<sup>3</sup> Underage youth are more likely to see on a per capita basis, or be “overexposed” to, a magazine advertisement for alcohol when it is placed in a publication where the percentage of underage youth in the readership is greater than the percentage of underage youth in the general population. (In 2005, for example, this meant that youth were overexposed to advertisements in magazines where underage youth were more than 15.4% of the readership.)  
<sup>4</sup> “Alcopops” are also referred to as “low-alcohol refreshers,” “malternatives” or “flavored malt beverages.” Many of the brands in this category, including brands such as Mike’s Hard Lemonade and Smirnoff Ice, have alcohol contents of between 4% and 6%, similar to most traditional malt beverages. (Alcohol and Tobacco Tax and Trade Bureau [TTB], “Notice No. 4—Flavored Malt Beverages and Related Proposals,” *Federal Register* [March 24, 2003]: 14293.) The alcohol industry treats these as a distinct category of alcoholic beverages. This report follows this industry convention.

## Table of Contents

I. EXECUTIVE SUMMARY	1
II. WHY THE CONCERN	2
III. ABOUT THIS REPORT	3
IV. ALCOHOL ADVERTISING IN MAGAZINES, 2001–2005	4
V. YOUTH OVEREXPOSURE TO ALCOHOL ADVERTISING IN NATIONAL MAGAZINES	4
VI. OVEREXPOSURE BY BRAND	7
VII. MEETING THE STANDARDS	8
VIII. CONCLUSION	10
APPENDIX A: METHODOLOGY	11
APPENDIX B: GLOSSARY OF ADVERTISING TERMS	14
APPENDIX C: ALCOHOL ADVERTISEMENTS BY PUBLICATION BY YEAR; PUBLICATIONS SORTED BY YOUTH AGES 12–20 AUDIENCE COMPOSITION	15
APPENDIX D: MAGAZINE REACH, FREQUENCY AND GRPS BY BEVERAGE TYPE, 2001–2005	18

The Center on  
**Alcohol Marketing** and *Youth*

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Center on Alcohol Marketing and Youth  
Georgetown University  
Box 571444  
3300 Whitehaven St. NW, Suite 5000  
Washington, D.C. 20057  
(202) 687-1019  
[www.camy.org](http://www.camy.org)

- In 2005, 81% of youth exposure to alcohol advertising in magazines came from advertisements placed in magazines with disproportionately large youth readerships.
- The majority of alcohol brands (127 out of 201 brands) had either all or more than half of their advertising in publications with youth readerships below 15%. However, 36 brands had all of their advertising and 38 brands had the majority of theirs in magazines read disproportionately by youth.
- More than half of youth exposure to

alcohol advertising in magazines came from 18 brands, 16 of which overexposed youth ages 12 to 20 relative to adults age 21 and over. These 18 brands accounted for approximately 36% of all alcohol advertising spending in magazines in 2005.

In 2003, the National Research Council and Institute of Medicine recommended that alcohol companies move their advertising toward magazines with a maximum of 15% youth audiences, a figure roughly proportionate to the pres-

ence of persons ages 12 to 20 in the population age 12 and above.<sup>5</sup> The U.S. Surgeon General recently called on alcohol companies to ensure that “the placement of alcohol advertising, promotions, and other means of marketing do not disproportionately expose youth to messages about alcohol.”<sup>6</sup> While the majority of alcohol brands do not disproportionately expose youth to their advertising, the placement practices of a relatively small number of brands need to change for further progress to be made in reducing youth exposure to alcohol advertising in magazines.

## II. Why the Concern

Alcohol is the leading drug problem among America’s youth. It is closely associated with the three leading causes of death among youth—motor vehicle crashes, homicide and suicide.<sup>7</sup> The Surgeon General has termed the short- and long-term consequences of underage alcohol consumption “...astounding in their range and magnitude, affecting adolescents, the people around them, and society as a whole.”<sup>8</sup> Each year, approximately 5,000 people under age 21 die from alcohol-related injuries involving underage drinking.<sup>9</sup> In 2005, 45% of high school students reported drinking alcohol in the past month, and 29% reported binge drinking—typically defined as consuming five or more

drinks on an occasion. Young binge drinkers were far more likely than other youth to engage in other risky behaviors, such as 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.<sup>10</sup>

Recent research has found a significant relationship between exposure to alcohol marketing in various forms and youth drinking behavior. A national longitudinal study published in 2006 found that for every additional alcohol advertisement to which youth were exposed (above an average of 23 per month), they drank 1% more, and for every additional

dollar per capita spent on alcohol advertising in a media market (above an average of \$6.80), youth in that market drank 3% more on average, even when researchers controlled for level of alcohol sales in that market.<sup>11</sup> Other studies have found links between youth drinking and other forms of alcohol marketing, such as exposure to alcohol advertising in magazines or at beer concession stands at sporting or musical events,<sup>12</sup> exposure to alcohol brands in movies,<sup>13</sup> and ownership of alcohol-branded merchandise.<sup>14</sup>

In recognition of the importance of monitoring alcohol marketing’s potential influence on youth, the Federal Trade Commission has issued two

<sup>5</sup> National Research Council and Institute of Medicine, *Reducing Underage Drinking: A Collective Responsibility*, R.J. Bonnie and M.E. O’Connell, eds. (Washington, D.C.: National Academies Press, 2004), 138.

<sup>6</sup> U.S. Department of Health and Human Services, Office of the Surgeon General, *The Surgeon General’s Call to Action To Prevent and Reduce Underage Drinking* (Washington, D.C., 2007), 44.

<sup>7</sup> Centers for Disease Control and Prevention, National Center for Injury Prevention and Control, “10 Leading Causes of Death, United States: 2003, All Races, Both Sexes,” in the WISQARS Leading Causes of Death Reports, 1999–2003. Available at <http://webappa.cdc.gov/sasweb/ncipc/lead-caus10.html> (accessed November 28, 2006); and National Research Council and Institute of Medicine, *Reducing Underage Drinking: A Collective Responsibility*, R.J. Bonnie and M.E. O’Connell, eds. (Washington, D.C.: National Academies Press, 2004), 60–61.

<sup>8</sup> U.S. Department of Health and Human Services, Office of the Surgeon General, *The Surgeon General’s Call to Action To Prevent and Reduce Underage Drinking* (Washington, D.C., 2007), 10.

<sup>9</sup> Ibid.

<sup>10</sup> J.W. Miller, T.S. Naimi, R.D. Brewer, S.E. Jones, “Binge Drinking and Associated Health Risk Behaviors Among High School Students,” *Pediatrics* 119, no. 1 (2007): 76–85.

<sup>11</sup> L. Snyder, F. Milici, M. Slater, H. Sun, Y. Strizhakova, “Effects of Alcohol Advertising Exposure on Drinking among Youth,” *Archives of Pediatrics and Adolescent Medicine* 160, no. 1 (2006): 18–24.

<sup>12</sup> P.L. Ellickson, R.L. Collins, K. Hambarsoomians, D.F. McCaffrey, “Does Alcohol Advertising Promote Adolescent Drinking? Results from a Longitudinal Assessment,” *Addiction* 100, no. 2 (2005): 235–46.

<sup>13</sup> J.D. Sargent, T.A. Willis, M. Stoolmiller, J. Gibson, F.X. Gibbons, “Alcohol Use in Motion Pictures and Its Relation with Early-Onset Teen Drinking,” *Journal of Studies on Alcohol* 67, no. 1 (2006): 54–65.

<sup>14</sup> A.C. McClure, S. Dal Cin, J. Gibson, J. Sargent, “Ownership of Alcohol-branded Merchandise and Initiation of Teen Drinking,” *American Journal of Preventive Medicine* 30, no. 4 (2006): 277–83.

reports on the subject in the past eight years and has announced plans to issue a third in the summer or fall of 2007. Its

### III. About This Report

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

CAMY commissioned Virtual Media Resources (VMR) to analyze advertisements for alcoholic beverages placed from 2001 to 2005 in national magazines measured by Mediamark Research Inc. (MRI). VMR is a media research, planning, market analysis and consulting firm based in Natick, Massachusetts, serving communications organizations and marketers in a wide variety of market segments and media. VMR was established in 1992 to provide an independent research firm serving advertising agencies and has grown to service over 100 clients across the United States and Canada in retail, publishing, financial, automotive, public health and other fields.

This report is based on industry-standard data sources and methods that are available to advertising agencies and advertisers as they make their decisions about where to place their advertising. This report only covers youth exposure to alcohol product advertising, and does not attempt to document or analyze the effects of the content of that advertising,

including whether that content meets the standards set in the alcohol industry's voluntary codes of good marketing practice. Advertising occurrence and expenditure data came from TNS Media Intelligence (formerly CMR or Competitive Media Reporting). Audience data came from MRI, the leading industry source for magazine readership demographics.

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

The measures in this report are standard to the advertising research field but may not be familiar to the general reader. "Reach" refers to the number or percentage of a target population that has the opportunity to see an 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) measure how much advertising exposure is going to a particular population on a per capita basis. For example, the measure of 100 GRPs indicates that the population received the equivalent of one exposure per person (although this also could have come from 50% of the population seeing the advertising two times). GRPs are the mathematical product of reach and frequency: if the reach is 80% and the average frequency is 2.5, then the GRPs total 200. GRPs thus provide a comparative measure of per capita advertising exposure. Further information on sources and methodology may be found in Appendix A. Appendix B provides a glossary of advertising research terminology.

ing among other things parents, peers, and the media, there is reason to believe that advertising also plays a role."<sup>15</sup>

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Richard Zackon, Principal, Media Edge, Inc., media consultancy; Adjunct Professor, New York University; former Research Director for the Cabletelevision Advertising Bureau and Court TV.

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<sup>15</sup> Federal Trade Commission, *Self-Regulation in the Alcohol Industry: A Review of Industry Efforts to Avoid Promoting Alcohol to Underage Consumers* (Washington, D.C., 1999), 4.

## IV. ALCOHOL ADVERTISING IN MAGAZINES, 2001–2005

Alcohol companies spent more than \$8.5 billion on advertising in the measured media of television, radio, print and outdoor between 2001 and 2005. Of this, more than \$2 billion was spent on advertising in national magazines; this report looked at product advertising representing 80% of this spending.<sup>16</sup> Annual alcohol advertising spending in the magazines analyzed for this report increased in the first part of this five-year period, but has declined recently (see Table 1), reflecting the movement of alcohol advertising from magazines to television. Although distilled spirits companies were the dominant buyers of alcohol advertising in magazines from 2001 to 2005, their spending declined during this period (from \$254 million to \$210 million). On the other hand, beer companies substantially increased their spending (from \$31 million to \$72 million), as did wine companies (from \$29 million to \$43 million). Alcopops advertising pages peaked in 2002 and 2004, but fell off precipitously in 2005.

**Table 1: Alcohol Advertisements and Spending in National Magazines Measured by MRI, 2001–2005**

Year	Beer and Ale		Distilled Spirits		Alcopops		Wine		Total	
	Ads	Dollars	Ads	Dollars	Ads	Dollars	Ads	Dollars	Ads	Dollars
2001	292	\$30,524,944	2,840	\$254,375,577	73	\$6,944,474	411	\$28,534,584	3,616	\$320,379,579
2002	291	\$33,991,692	2,697	\$260,802,078	96	\$10,294,433	514	\$38,857,593	3,598	\$343,945,795
2003	465	\$54,893,009	2,330	\$228,207,697	29	\$3,009,913	417	\$39,947,891	3,241	\$326,058,509
2004	514	\$64,674,633	2,224	\$239,121,482	70	\$10,468,580	475	\$46,700,395	3,283	\$360,965,090
2005	520	\$71,752,209	1,910	\$210,457,371	21	\$1,881,440	446	\$42,654,495	2,897	\$326,745,515
<b>5-Year Total</b>	<b>2,082</b>	<b>\$255,836,486</b>	<b>12,001</b>	<b>\$1,192,964,206</b>	<b>289</b>	<b>\$32,598,839</b>	<b>2,263</b>	<b>\$196,694,958</b>	<b>16,635</b>	<b>\$1,678,094,488</b>

Sources: TNS Media Intelligence, 2001–2005; MRI, 2001–2006.

Note: Sums of rows and columns may not match totals due to rounding.

## V. YOUTH OVEREXPOSURE TO ALCOHOL ADVERTISING IN NATIONAL MAGAZINES

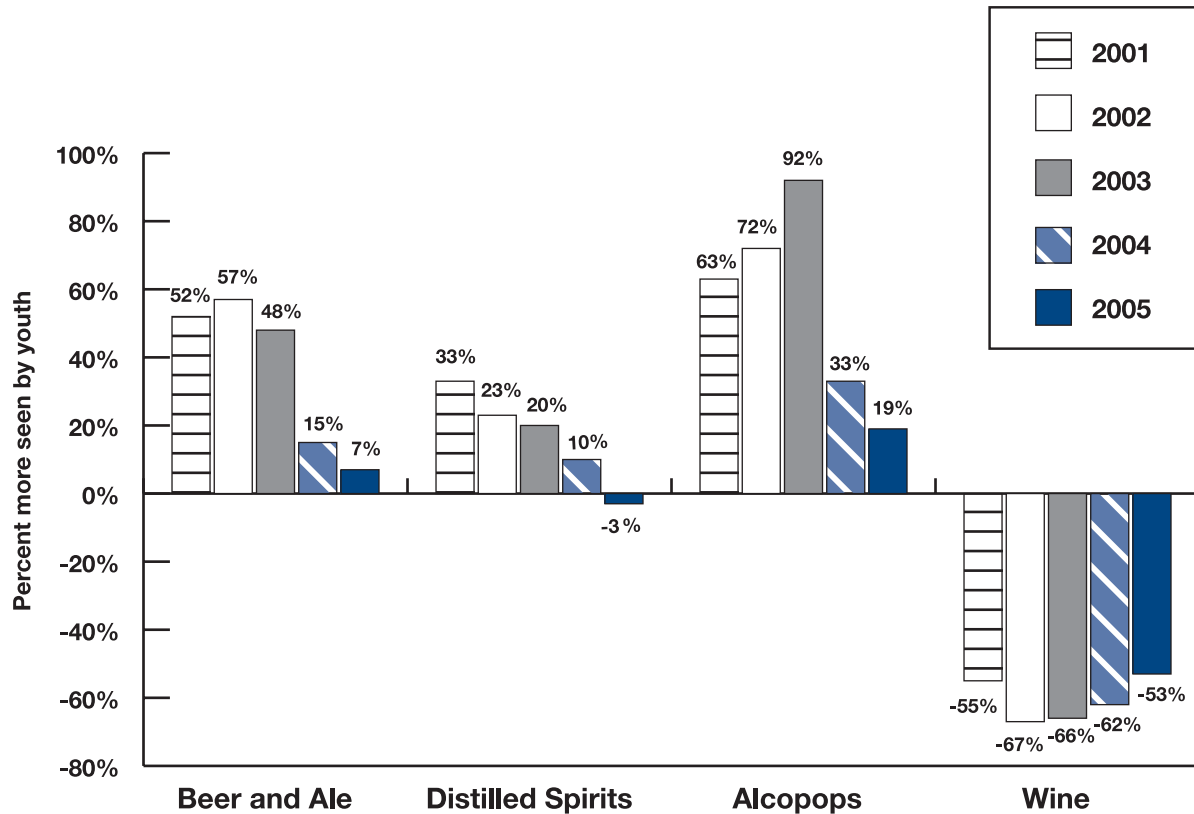
When young people ages 12 to 20 are disproportionately represented in a magazine's readership relative to their presence in the general population, this creates youth "overexposure" to alcohol advertising in the magazine. In the advertising industry, average issue readership typically equates with advertising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

Figure 1 shows that overall youth overexposure to alcohol advertising in magazines has fallen substantially in the wake of adoption in late 2003 of the industry's voluntary standard of 30% maximum youth audience composition for vehicles in which it places its advertising. By 2005, youth overexposure to beer advertising had dropped from a peak of 57% to a five-year low of 7%, youth overexposure to alcopops advertising had declined from a high of 92% in 2003 to 19% in 2005, and overexposure to distilled spirits advertising, which reached its zenith at 33% in 2001, disappeared in 2005.



<sup>16</sup> Magazine titles and editions included in this analysis were those for which TNS Media Intelligence tracked advertising occurrences and for which MRI provided readership estimates. Only product advertisements were included in this analysis. For more information on methodology, see Appendix A. For a list of the magazines included in the analysis, see Appendix C.

**Figure 1: Youth Overexposure to Alcohol Advertising in National Magazines, 2001–2005**



Sources: TNS Media Intelligence, 2001–2005; MRI Adult Studies, Spring 2002–2006; MRI TwelvePlus, 2001–2005; MRI Teenmark, 2001.

As Table 2 demonstrates, 2005 was a landmark year—the first year since 2001 (when CAMY monitoring of alcohol advertising began) that young people saw less alcohol advertising in magazines on average than adults of legal drinking age. The last column of the table shows that in 2005 youth were still exposed to substantially more alcohol advertising than persons of their parents’ generation, the 35-and-over age group, signaling the difficulty many parents face in attempting to monitor their children’s exposure to alcohol advertising.

Overall youth exposure to alcohol advertising in magazines has fallen substantially since 2001, and at a faster rate than the exposure of other age groups. Youth exposure as measured in gross rating points (GRPs) dropped by 49% from 2001 to 2005, while exposure of young adults ages 21 to 34 (the group sometimes cited by industry sources as the primary target of this advertising<sup>17</sup>) fell 33%, and exposure of adults age 21 and over declined by 30%. Reach and frequency are additional measures of exposure, and data on these measures are included as Appendix D.



<sup>17</sup> See, e.g., H. Riell, “Half Full or Half Empty?,” *Beverage Dynamics* 112, no. 3 (May 1, 2002): 8; R. Zimoch, “Malternatives: A New Brew Rides to the Rescue,” *Grocery Headquarters* 68, no. 4 (April 1, 2002): 83; S. Theodore, “Beer’s on the Up and Up,” *Beverage Industry* 92, no. 4 (April 1, 2001): 18–24.

**Table 2: Exposure to Alcohol Advertising in National Magazines by Age Group, 2001–2005**

Beverage Type	GRPs				GRP Ratios		
	Ages 12–20	Age 21+	Ages 21–34	Age 35+	Ages 12–20: Age 21+	Ages 12–20: Ages 21–34	Ages 12–20: Age 35+
<b>2001</b>							
Beer and Ale	1,870	1,227	2,064	914	1.52	0.91	2.04
Distilled Spirits	13,175	9,916	15,892	7,680	1.33	0.83	1.72
Alcopops	407	250	480	164	1.63	0.85	2.49
Wine	606	1,359	1,285	1,386	0.45	0.47	0.44
<b>Total</b>	<b>16,057</b>	<b>12,752</b>	<b>19,720</b>	<b>10,144</b>	<b>1.26</b>	<b>0.81</b>	<b>1.58</b>
<b>2002</b>							
Beer and Ale	1,840	1,171	2,049	842	1.57	0.90	2.19
Distilled Spirits	11,324	9,234	14,809	7,143	1.23	0.76	1.59
Alcopops	668	388	787	239	1.72	0.85	2.80
Wine	544	1,637	1,604	1,649	0.33	0.34	0.33
<b>Total</b>	<b>14,376</b>	<b>12,430</b>	<b>19,249</b>	<b>9,873</b>	<b>1.16</b>	<b>0.75</b>	<b>1.46</b>
<b>2003</b>							
Beer and Ale	2,425	1,633	2,881	1,163	1.48	0.84	2.08
Distilled Spirits	8,618	7,194	11,422	5,601	1.20	0.75	1.54
Alcopops	193	101	210	60	1.92	0.92	3.24
Wine	381	1,134	1,086	1,152	0.34	0.35	0.33
<b>Total</b>	<b>11,616</b>	<b>10,062</b>	<b>15,598</b>	<b>7,976</b>	<b>1.15</b>	<b>0.74</b>	<b>1.46</b>
<b>2004</b>							
Beer and Ale	2,085	1,812	2,925	1,396	1.15	0.71	1.49
Distilled Spirits	7,921	7,227	10,488	6,009	1.10	0.76	1.32
Alcopops	443	332	545	252	1.33	0.81	1.76
Wine	578	1,514	1,311	1,590	0.38	0.44	0.36
<b>Total</b>	<b>11,026</b>	<b>10,885</b>	<b>15,270</b>	<b>9,247</b>	<b>1.01</b>	<b>0.72</b>	<b>1.19</b>
<b>2005</b>							
Beer and Ale	1,948	1,827	2,982	1,401	1.07	0.66	1.41
Distilled Spirits	5,570	5,726	8,693	4,630	0.97	0.65	1.23
Alcopops	62	52	97	35	1.19	0.86	2.35
Wine	621	1,329	1,349	1,321	0.47	0.46	0.47
<b>Total</b>	<b>8,200</b>	<b>8,934</b>	<b>13,120</b>	<b>7,387</b>	<b>0.92</b>	<b>0.62</b>	<b>1.11</b>

Sources: TNS Media Intelligence, 2001–2005; MRI Adult Studies, Spring 2002–2006; MRI TwelvePlus, 2001–2005; MRI Teenmark, 2001.  
 Note: Sums of rows and columns may not match totals due to rounding.

## VI. OVEREXPOSURE BY BRAND

GRP totals for all alcoholic beverages and for alcoholic beverage categories obscure the fact that alcohol advertising is placed by brand, not by category, and there is tremendous variation among brands in the amount of youth exposure and overexposure generated. In 2005, a total of 201 brands advertised in the national magazines analyzed for this report. Of those 201 brands, 18 were responsible for more than half of youth exposure to alcohol advertising in magazines and, as shown in Table 3, 16 of these brands overexposed youth.

**Table 3: Alcohol Brands Generating More Than Half of Youth Exposure to Alcohol Advertising in Magazines, 2005**

Brand	Ads	Dollars	Cumulative % of youth exposure	Cumulative % of spending	GRPs				GRP Ratios		
					Ages 12-20	Age 21+	Ages 21-24	Ages 35+	Ages 12-20: Age 21+	Ages 12-20: Ages 21-34	Ages 12-20: Ages 35+
Skyy Vodka	60	\$8,703,714	5.7%	2.7%	471	362	612	269	1.30	0.77	1.75
Miller Lite	94	\$13,385,932	10.5%	6.8%	391	338	603	240	1.16	0.65	1.63
Ketel One Vodka	178	\$11,915,049	14.8%	10.4%	352	424	551	377	0.83	0.64	0.93
Jack Daniel's Whiskey	58	\$7,298,118	18.3%	12.6%	291	246	357	205	1.18	0.81	1.42
Patron Tequilas	74	\$7,374,776	21.6%	14.9%	264	204	397	132	1.29	0.66	1.99
Rums of Puerto Rico	43	\$4,392,349	24.6%	16.2%	246	174	338	113	1.41	0.73	2.17
Miller Genuine Draft	39	\$10,132,870	27.4%	19.3%	233	184	308	138	1.27	0.76	1.69
Crown Royal Whiskey	44	\$4,827,302	29.9%	20.8%	208	150	221	123	1.39	0.94	1.68
Bud Light	26	\$4,265,601	32.4%	22.1%	205	138	223	107	1.48	0.92	1.92
Evan Williams Kentucky Straight Bourbon Whiskey	48	\$5,072,658	34.9%	23.7%	204	202	280	173	1.01	0.73	1.18
B to the E Beer	34	\$4,201,180	37.2%	25.0%	188	133	287	76	1.42	0.66	2.47
Absolut Flavored Vodkas	53	\$5,285,265	39.3%	26.6%	171	158	290	109	1.09	0.59	1.57
Cointreau Liqueur	34	\$5,545,208	41.4%	28.3%	168	144	244	107	1.17	0.69	1.57
Wild Turkey Bourbon Whiskey	36	\$3,556,168	43.4%	29.4%	165	109	218	69	1.51	0.75	2.38
Jim Beam Bourbon Whiskey	38	\$4,418,632	45.3%	30.7%	161	111	203	77	1.45	0.79	2.08
Budweiser Select Beer	35	\$4,062,844	47.1%	32.0%	148	116	208	81	1.28	0.71	1.82
Michelob Ultra Light Beer	90	\$8,902,985	48.8%	34.7%	140	236	275	221	0.59	0.51	0.63
1800 Reserva Reposado Tequila	22	\$2,931,699	50.5%	35.6%	138	88	191	49	1.57	0.72	2.79
<b>Subtotal - 18 brands</b>	<b>1,006</b>	<b>\$116,272,350</b>			<b>4,142</b>	<b>3,516</b>	<b>5,807</b>	<b>2,670</b>	<b>1.18</b>	<b>0.71</b>	<b>1.55</b>
<b>All other brands</b>	<b>1,891</b>	<b>\$210,473,165</b>			<b>4,058</b>	<b>5,418</b>	<b>7,313</b>	<b>4,717</b>	<b>0.75</b>	<b>0.55</b>	<b>0.86</b>
<b>Total</b>	<b>2,897</b>	<b>\$326,745,515</b>			<b>8,200</b>	<b>8,934</b>	<b>13,120</b>	<b>7,387</b>	<b>0.92</b>	<b>0.62</b>	<b>1.11</b>

Sources: TNS Media Intelligence, 2005; MRI Adult Study, Spring 2006; MRI TwelvePlus, 2005.  
Note: Sums of GRP columns may not match totals due to rounding.

## VII. MEETING THE STANDARDS

By 2005, nearly all alcohol advertising in magazines had moved to publications with youth audience compositions lower than the 30% standard published in the alcohol industry's voluntary codes of good marketing practice. Table 4 shows the dramatic decline in advertising in such publications, and illustrates the impact of alcohol companies moving more than \$30 million worth of advertising out of publications with very high youth audience compositions. The nine advertisements in publications with youth audiences exceeding 30% in 2005 were from four brands—Skyy Vodka (three advertisements), Phillips Union Whiskey (three advertisements), Navan French Cognac Liqueur (two advertisements), and Hennessy Very Special Cognac (one advertisement).

**Table 4: Alcohol Advertising Placements and Expenditures in Publications With Greater Than 30% Youth Audience Compositions, 2001–2005**

Year	Total				Ads Greater Than 30% Ages 12–20							
	Ads	Dollars	Ages 12–20 GRPs	Age 21+ GRPs	Ads >30%	% of Total Ads	Dollars >30%	% of Total Dollars	Ages 12–20 GRPs >30%	% of Total Ages 12–20 GRPs	Age 21+ GRPs >30%	% of Total Age 21+ GRPs
2001	3,616	\$320,379,579	16,057	12,752	382	10.6%	\$30,000,933	9.4%	3,340	20.8%	1,120	8.8%
2002	3,598	\$343,945,795	14,376	12,430	389	10.8%	\$37,983,478	11.0%	3,680	25.6%	1,414	11.4%
2003	3,241	\$326,058,509	11,616	10,062	223	6.9%	\$19,766,359	6.1%	1,797	15.5%	603	6.0%
2004	3,283	\$360,965,090	11,026	10,885	101	3.1%	\$6,219,480	1.7%	470	4.3%	141	1.3%
2005	2,897	\$326,745,515	8,200	8,934	9	0.3%	\$741,730	0.2%	76	0.9%	29	0.3%

Sources: TNS Media Intelligence, 2001–2005; MRI Adult Studies, Spring 2002–2006; MRI TwelvePlus, 2001–2005; MRI Teenmark, 2001.

Describing the industry's maximum youth audience standard in 2003 Congressional testimony, Beer Institute President Jeff Becker said, "...[t]his standard reflects the demographics of the U.S. population..."<sup>18</sup> because 70% of the U.S. population is over the age of 21. However, for magazines, the industry-standard sources measure audiences starting at age 12. In the population age 12 and above, adults over age 21 constitute roughly 85% of the population,<sup>19</sup> so a standard reflective of the demographics of that population would set a maximum of 15% youth in a magazine's readership. This is the standard that the National Research Council (NRC) and Institute of Medicine (IOM) recommended that the industry move towards in 2003.<sup>20</sup>



Approximately half of alcohol advertising in 2005 was placed in magazines with youth audiences above the 15% standard, as shown in Table 5. This advertising accounted for more than 82% of total youth exposure to alcohol advertising in magazines in 2005, but only 54.5% of adult exposure.

<sup>18</sup> J.G. Becker, testifying before the Senate Committee on Health, Education, Labor and Pensions, Subcommittee on Substance Abuse and Mental Health Services, 108th Cong. 1st sess, September 30, 2003.

<sup>19</sup> According to the U.S. Census Bureau, in the year 2000, young people ages 12 to 20 were 15.6% of the total age-12-and-above population. U.S. Census Bureau, *Census 2000 Summary File 2* [United States], PCT3, Sex by Age [209]—Universe: Total Population.

<sup>20</sup> National Research Council and Institute of Medicine, *Reducing Underage Drinking: A Collective Responsibility*, R.J. Bonnie and M.E. O'Connell, eds. (Washington, D.C.: National Academies Press, 2004), 138.



**Table 5: Alcohol Advertising Placements and Expenditures  
in Publications With Greater Than 15% Youth Audience Compositions, 2001–2005**

Year	Total Ads				Ads Greater Than 15% Ages 12–20							
	Ads	Dollars	Ages 12–20 GRPs	Age 21+ GRPs	Ads >15%	% of Total Ads	Dollars >15%	% of Total Dollars	Ages 12–20 GRPs >15%	% of Total Ages 12–20 GRPs	Age 21+ GRPs >15%	% of Total Age 21+ GRPs
2001	3,616	\$320,379,579	16,057	12,752	1,867	51.6%	\$190,224,222	59.4%	14,338	89.3%	8,151	63.9%
2002	3,598	\$343,945,795	14,376	12,430	1,855	51.6%	\$199,166,793	57.9%	12,532	87.2%	7,221	58.1%
2003	3,241	\$326,058,509	11,616	10,062	1,494	46.1%	\$169,668,845	52.0%	10,094	86.9%	5,731	57.0%
2004	3,283	\$360,965,090	11,026	10,885	1,373	41.8%	\$173,049,200	47.9%	9,102	82.6%	5,782	53.1%
2005	2,897	\$326,745,515	8,200	8,934	1,281	44.2%	\$162,153,521	49.6%	6,767	82.5%	4,865	54.5%

Sources: TNS Media Intelligence, 2001–2005; MRI Adult Studies, Spring 2002–2006; MRI TwelvePlus, 2001–2005; MRI Teenmark, 2001.

Again, there is considerable variation by brand. In 2005, the majority of brands (127 out of 201) placed all or more than half of their advertising in magazines more likely to be read by adults than by youth. The 36 brands listed in Table 6 placed all of their advertising in magazines with disproportionately high youth audiences; the majority of advertising for an additional 38 brands was also in magazines more likely to be seen by youth than by adults.

**Table 6: Brands With All Their Advertising in Publications With Youth Audiences Above 15%, 2005**

Brand	Total	
	Ads	Dollars
Jim Beam Bourbon Whiskey	38	\$4,418,632
Bud Light	26	\$4,265,601
B to the E Beer	34	\$4,201,180
Wild Turkey Bourbon Whiskey	36	\$3,556,168
Jose Cuervo Golden Margaritas	15	\$1,842,335
Molson Canadian	6	\$1,615,629
Southern Comfort	17	\$1,454,727
Dos Equis Beer	4	\$1,117,800
Phillips Union Whiskey	14	\$1,045,557
Smirnoff Twisted Five Malt Beverage	10	\$907,720
Captain Morgan Spiced Rum	6	\$879,598
Cabo Wabo Tequila	11	\$796,254
Korbel California Champagnes	7	\$661,701
Seagram's Extra Dry Gin	14	\$621,163
Keystone Light Beer	13	\$591,045
Remy Martin Cognacs	5	\$589,612
Stolichnaya Vodkas	5	\$567,960
Bacardi Rums	6	\$523,477
Heineken Beer	6	\$517,880
Captain Morgan Parrot Bay Rum	6	\$500,704
Dom Perignon Champagnes	3	\$442,353
Christian Brothers Brandy	11	\$428,690
Hennessy Very Special Cognac	7	\$395,382
Mirassou Wines	3	\$391,353
Grolsch Premium Lager	6	\$389,430
Sparks Malt Beverage	6	\$352,450
Navan French Cognac Liqueur	4	\$311,432
Canadian Mist Whiskey	1	\$279,450
Pacifico Beer	3	\$278,955
Bacardi Flavored Rums	3	\$274,404
Midori Liqueur	3	\$253,334
Seagram's Flavored Gins	4	\$194,929
Corona Extra Light Beer	2	\$190,460
Smirnoff Flavored Vodkas	1	\$135,535
Alize Liqueur	2	\$54,368
Sailor Jerry Spiced Navy Rum	1	\$17,507
<b>Total</b>	<b>339</b>	<b>\$35,064,775</b>

Sources: TNS Media Intelligence, 2005; MRI Adult Study, Spring 2006; MRI TwelvePlus, 2005.

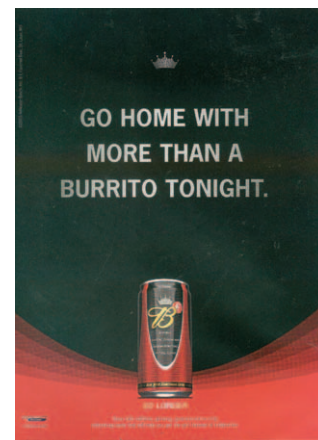
## VIII. CONCLUSION

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In response to the public spotlight placed on their advertising, alcohol companies have made significant progress in reducing youth exposure to their advertising in national magazines. Almost all of the 2,897 advertisement placements from 2005 analyzed for this report were in publications that met the industry's voluntary standard of no more than 30% youth audiences. Movement to this standard by 2005 shows that alcohol companies can change their advertising placement practices to reduce youth exposure.

However, in 2005 the overwhelming majority (more than 80%) of youth exposure to alcohol advertising in magazines came from placements in publications that exceeded the 15% standard recommended by the NRC and IOM, and encouraged by a bi-partisan group of 20 state attorneys general in a letter to the Federal Trade Commission in May 2006.<sup>21</sup>

In December 2006, President Bush signed the Sober Truth on Preventing Underage Drinking Act. This legislation, which passed unanimously in both houses of Congress, among other provisions requires the U.S. Department of Health and Human Services to monitor rates of youth exposure to messages in the mass media encouraging and discouraging alcohol use, and to include the findings in an annual report to Congress on underage drinking. In March 2007, the Surgeon General called on the public health community to “conduct ongoing, independent monitoring of alcohol marketing to youth to ensure compliance with advertising standards.”<sup>22</sup>



This is the 22<sup>nd</sup> report on youth exposure to alcohol advertising issued by CAMY since its founding in 2002. In that time, youth exposure to alcohol advertising in magazines has fallen substantially. As of 2005, the actions of a relatively small number of alcohol brands were responsible for the bulk of youth exposure to alcohol advertising in magazines. Based on experience to date, ongoing monitoring and reporting of alcohol industry advertising practices should be helpful in documenting and influencing the behavior of these advertisers and thereby reducing youth exposure to alcohol advertising.

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<sup>21</sup> RE: Alcohol Reports, Paperwork Comment, FTC File No. P064505. A Communication from the Chief Legal Officers of the Following States: Arizona, Connecticut, Delaware, Hawaii, Idaho, Illinois, Iowa, Maine, Maryland, New Jersey, New Mexico, New York, Ohio, Oregon, Rhode Island, Utah, Vermont, Washington, Wyoming [California subsequently signed on], May 8, 2006. Available at <http://www.ftc.gov/os/comments/alcoholmanufacadstudy/522852-01287.pdf> (accessed December 6, 2006).

<sup>22</sup> U.S. Department of Health and Human Services, Office of the Surgeon General, *The Surgeon General's Call to Action To Prevent and Reduce Underage Drinking* (Washington, D.C., 2007), 68.

# Appendix A: Methodology

## Research Process

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

## Counting Advertisements Using TNS Media Intelligence

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

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

Only those publications reported in the MRI Teenmark, 2001; MRI TwelvePlus, 2001–2005; or MRI Adult Studies, Spring 2002–2006 were included in the analysis. By restricting the analysis to product advertising in full-run editions of MRI-reported audiences, the report tracks 81% of total reported magazine alcohol advertising expenditures in 2001, 83% in 2002, 82% in 2003, 78% in 2004, and 76% in 2005. As a percentage of alcohol product advertising in national editions, MRI reports audiences for advertising representing 86% of expenditures in 2001, 93% in 2002, 94% in 2003, 93% in 2004 and 93% in 2005.

**Table 7: Disposition of Alcohol Advertising Expenditures in National Magazines, 2001–2005**

	2001		2002		2003		2004		2005		2001–2005	
	\$(000)	% of Dollars	\$(000)	% of Dollars	\$(000)	% of Dollars	\$(000)	% of Dollars	\$(000)	% of Dollars	\$(000)	% of Dollars
All Alcohol Ads	\$396,588	100.0%	\$413,458	100.0%	\$399,871	100.0%	\$460,959	100.0%	\$429,253	100.0%	\$2,100,129	100.0%
National Editions Only	\$375,135	94.6%	\$378,991	91.7%	\$359,335	89.9%	\$399,748	86.7%	\$370,701	86.4%	\$1,883,909	89.7%
Product Ads Only	\$371,410	93.7%	\$369,397	89.3%	\$347,375	86.9%	\$387,934	84.2%	\$350,888	81.7%	\$1,827,005	87.0%
Reported by MRI	\$320,380	80.8%	\$343,946	83.2%	\$326,059	81.5%	\$360,965	78.3%	\$326,746	76.1%	\$1,678,094	79.9%

Sources: TNS Media Intelligence, 2001–2005; MRI Adult Studies, Spring 2002–2006; MRI TwelvePlus, 2001–2005; MRI Teenmark, 2001.

Note: Sums of rows may not match totals due to rounding.

## Measuring Audiences

### Sources of Magazine Audience Data

MRI conducts ongoing studies of adults and teens to ascertain publication audience readership. These data are published either twice per year (for adults age 18 and older) or annually (for teens ages 12 to 17). 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 used only for *Maxim*, which was not reported in the 2001 TwelvePlus Study

#### 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)

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

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

MRI employs two methodologies for the audience estimates used in this report. The adult survey methodology, used for persons age 18 and over, 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 to 17, MRI uses a household sample drawn from its Adult Study and employs a “frequency of reading” (FOR) question with a mailed questionnaire in which respondents indicate how many (out of an average four issues) they have read. The raw data are weighted such that a respondent claiming to have read one out of four issues is assigned a .25 probability of being in the average audience for the magazine, one claiming to have read two out of four receives a .50 probability, and so on.

The two surveys represent differing methodologies, a common feature of advertiser-supported media surveys, but they are also the most commonly accepted and used magazine audience surveys for their respective markets. MRI combines the results of these two methodologies in its TwelvePlus reports.

To assess the impact of these differing methodologies on the results presented in this report, VMR compared the ages-18-to-19 audiences for the 31 publications measured by MRI using both methodologies, and which accepted alcohol advertising between 2001 and 2005. For 28 of the 31 publications, the reported ages-18-to-19 audience using the adult (RR) method was higher than that reported using the teen (FOR) method. For the ten publications with the highest reported alcohol advertising expenditures over the five year period covered in this report, all had higher ages-18-to-19 readerships using the adult (RR) vs. the teen (FOR) methodology (average = 52% greater). For all 31 publications, the average ages-18-to-19 audience was 40% greater. (Given the potential instability from such a small population segment, it is more reliable to average the results for this analysis.)

From this analysis, it is reasonable to conclude that the ratios of youth versus adult exposure in this report are conservative. The likely effect of the different measurement methodologies is to understate the audience of youth ages 12 to 20 relative to adults.

#### **Advertising Exposure Measures**

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

## 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, 2004 and 2005).<sup>23</sup>

## Magazines and Advertisements Not Counted

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

Of the 153 magazines with alcohol advertising in 2001 that were monitored by TNS Media Intelligence, 98 had product advertising and were measured for media audiences by MRI. For 2002, there were 146 monitored magazines with alcohol advertising, of which 108 had product advertising in national editions that were measured by MRI; for 2003, there were 140 monitored magazines with alcohol advertising, of which 106 had product advertising in national editions that were measured by MRI; for 2004, there were 153 monitored publications with alcohol advertising, of which 114 had product advertising in national editions that were measured by MRI; for 2005, there were 157 monitored publications with alcohol advertising, of which 111 had product advertising in national editions that were measured by MRI.

The unmeasured publications and editions, and non-product advertising represent \$76.2, \$69.5, \$73.8, \$100.0 and \$102.5 million in alcohol advertising in 2001, 2002, 2003, 2004 and 2005, respectively, or 19%, 17%, 18%, 22% and 24% of all alcohol advertising in magazines as reported by TNS Media Intelligence.

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

An additional but unknown amount is spent on advertising on publications for which occurrence data was not monitored by TNS Media Intelligence, or for which audience data was not reported by MRI, for one or more of the years covered in this report. For example, *Blender* was reported by both TNS and MRI as of 2005 but not earlier, while other publications with alcohol advertising, such as *XXL*, *Smooth* and *King* were not reported at any time over the time period covered in the report.

Advertising occurrence and expenditure data are subject to periodic revision and update by TNS Media Intelligence. Dollar totals for the years 2001–2004 may differ slightly from past CAMY magazine reports due to these changes.

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<sup>23</sup> Each book covers the market for the previous year. For 2003–2005, the category is defined as “low-proof refreshers (not over 7% 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); M. Shanken Communications, *The U.S. Beer Market: Impact Databank Review and Forecast*, 2005 ed. (New York: M. Shanken Communications, 2005); M. Shanken Communications, *The U.S. Beer Market: Impact Databank Review and Forecast*, 2006 ed. (New York: M. Shanken Communications, 2006).

## Appendix B: Glossary of Advertising Terms

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

### **Reach**

Reach is used to describe the number or percentage of a target population that has the potential to see an advertisement or a campaign through readership of selected media.

### **Frequency**

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

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

GRPs provide a measure of total advertising exposure and incorporate the impact of both reach and frequency. One rating point equals the number of exposures equivalent to 1% of a target population, and it may include repeat exposures. In advertising math, reach x frequency = GRPs: 75 reach (% of the potential audience) x 6.8 frequency (average number of exposures) = 510 GRPs.

### **Composition**

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

### **Composition Index**

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

## Appendix C: Alcohol Advertisements by Publication by Year; Publications Sorted by Youth Ages 12–20 Audience Composition

Publication	Ads by Year					Total	Ages 12–20 Audience Composition *
	2001	2002	2003	2004	2005		
<b>Greater than 30%</b>							
<i>The Source</i>	-	-	7	17	-	24	42.9% * 2004
<i>Allure</i>	8	7	8	2	-	25	33.3% * 2004
<i>Jane</i>	-	49	33	51	-	133	32.5% * 2004
<i>Vibe</i>	52	60	81	24	9	226	32.3%
<b>Greater than 15% and less than 30%</b>							
<i>Automobile</i>	8	19	6	2	-	35	28.4% * 2004
<i>ESPN The Magazine</i>	138	130	73	20	11	372	27.0%
<i>Rolling Stone</i>	198	136	112	37	35	518	26.8%
<i>Hot Rod</i>	-	-	2	8	2	12	25.6%
<i>Auto Week</i>	-	-	-	2	1	3	24.7%
<i>Car &amp; Driver</i>	10	7	6	12	16	51	23.8%
<i>Cosmopolitan</i>	99	94	68	59	34	354	23.4%
<i>Elle</i>	39	27	4	4	5	79	23.3%
<i>Stuff</i>	-	120	112	115	90	437	22.8%
<i>Premiere</i>	36	47	43	41	47	214	22.6%
<i>Spin</i>	81	56	48	7	15	207	22.2%
<i>Sports Illustrated</i>	156	159	148	131	89	683	22.0%
<i>Vogue</i>	49	47	43	41	31	211	21.6%
<i>Glamour</i>	21	10	8	33	35	107	21.6%
<i>Motor Trend</i>	4	-	-	-	3	7	21.5%
<i>Sporting News</i>	46	37	71	67	79	300	21.2%
<i>Maxim</i>	172	157	124	137	87	677	21.0%
<i>Fitness</i>	-	-	3	4	11	18	20.9%
<i>Marie Claire</i>	43	35	30	5	11	124	20.9%
<i>Road &amp; Track</i>	7	1	4	2	4	18	20.9%
<i>Jet</i>	40	31	31	43	35	180	20.0%
<i>In Style</i>	116	108	67	65	47	403	18.8%
<i>Lucky</i>	-	-	-	-	32	32	18.5%
<i>Us Weekly</i>	67	59	67	96	49	338	18.5%
<i>Brides</i>	6	1	1	4	7	19	18.3%
<i>Ebony</i>	32	27	25	23	25	132	18.2%
<i>Star</i>	-	-	-	3	9	12	17.9%
<i>Modern Bride</i>	-	1	-	2	7	10	17.9%
<i>In Touch</i>	-	-	-	-	10	10	17.3%
<i>Popular Science</i>	9	12	9	10	5	45	16.6%
<i>People</i>	44	25	9	23	16	117	16.5%
<i>W</i>	-	-	48	34	32	114	16.2%
<i>Essence</i>	26	17	16	17	6	82	16.1%
<i>Shape</i>	-	4	1	8	26	39	16.0%
<i>FHM</i>	-	105	115	177	135	532	15.8%
<i>Men's Fitness</i>	3	2	6	15	21	47	15.8%
<i>GQ</i>	140	150	134	110	93	627	15.7%
<i>Entertainment Weekly</i>	137	101	94	75	50	457	15.6%
<i>Country Weekly</i>	14	17	-	2	-	33	15.4% * 2004
<i>Blender</i>	-	-	-	-	61	61	15.1%
<i>Self</i>	10	13	12	4	14	53	15.0%

continued

\* 2005 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					Total	Ages 12-20 Audience Composition *
	2001	2002	2003	2004	2005		
<b>Less than 15%</b>							
<i>Popular Mechanics</i>	17	15	15	20	12	79	14.1%
<i>Bridal Guide</i>	1	2	3	-	-	6	12.7% * 2003
<i>Time</i>	10	18	23	32	7	90	12.6%
<i>Vanity Fair</i>	59	82	84	62	63	350	11.9%
<i>Playboy</i>	180	138	102	131	104	655	11.8%
<i>Penthouse</i>	12	7	-	-	-	19	11.6% * 2002
<i>Men's Health</i>	-	2	6	8	25	41	11.4%
<i>Yahoo! Internet Life</i>	49	-	-	-	-	49	11.4% * 2001
<i>People en Español</i>	-	-	-	-	5	5	10.8%
<i>Harper's Bazaar</i>	24	13	2	1	2	42	10.8%
<i>Men's Journal</i>	121	64	55	76	96	412	10.6%
<i>Esquire</i>	77	63	78	73	67	358	10.3%
<i>Elle Décor</i>	15	14	15	17	17	78	9.5%
<i>Newsweek</i>	12	8	3	4	5	32	9.5%
<i>U.S. News &amp; World Report</i>	-	2	2	1	-	5	9.2% * 2004
<i>O, The Oprah Magazine</i>	-	21	11	19	18	69	9.1%
<i>Backpacker</i>	-	1	-	-	-	1	8.7% * 2002
<i>National Geographic Adventure</i>	-	-	-	-	18	18	8.4%
<i>Biography</i>	3	12	-	-	-	15	8.0% * 2002
<i>National Geographic Traveler</i>	4	6	10	7	10	37	7.9%
<i>Redbook</i>	1	8	2	-	-	11	7.6% * 2003
<i>Veranda</i>	-	-	-	-	3	3	7.3%
<i>Popular Photography</i>	1	-	-	-	-	1	7.0% * 2001
<i>PC Magazine</i>	10	7	5	2	-	24	7.0% * 2004
<i>Ducks Unlimited</i>	5	5	4	5	1	20	7.0%
<i>Runners World</i>	3	3	8	16	5	35	6.7%
<i>Black Enterprise</i>	33	30	38	33	36	170	6.3%
<i>American Photo</i>	13	9	11	9	4	46	6.2%
<i>Wired</i>	-	-	13	28	38	79	6.2%
<i>Tennis</i>	14	5	7	3	8	37	6.0%
<i>Real Simple</i>	-	9	9	23	14	55	5.8%
<i>Entrepreneur</i>	-	-	-	-	4	4	5.8%
<i>Better Homes and Gardens</i>	-	3	-	-	-	3	5.6% * 2002
<i>Discover</i>	12	7	8	3	-	30	5.5% * 2004
<i>Outdoor Life</i>	25	18	5	12	4	64	5.4%
<i>Family Circle</i>	-	-	-	-	3	3	5.3%
<i>Bassmaster</i>	-	7	23	21	23	74	5.3%
<i>Bicycling</i>	-	2	5	4	8	19	5.2%
<i>Skiing</i>	51	39	38	27	10	165	5.2%
<i>Popular Photography &amp; Imaging</i>	-	-	-	1	-	1	5.1% * 2004
<i>Health</i>	4	-	-	-	1	5	5.0%
<i>Outside</i>	37	28	15	18	17	115	4.9%
<i>Southern Accents</i>	3	-	-	-	-	3	4.9% * 2001
<i>American Way</i>	3	3	-	-	-	6	4.9% * 2002
<i>Scientific American</i>	9	6	5	3	-	23	4.9% * 2004
<i>Inc.</i>	2	2	-	12	3	19	4.7%
<i>Barron's</i>	2	14	-	-	-	16	4.5% * 2002
<i>Boating</i>	-	-	-	2	-	2	4.5% * 2004
<i>Sky</i>	-	-	-	6	10	16	4.3%
<i>Golf Magazine</i>	48	62	81	117	102	410	4.2%
<i>Ladies Home Journal</i>	-	-	-	1	1	2	4.2%
<i>Golf World</i>	-	4	-	-	-	4	4.2% * 2002
<i>Business Week</i>	22	27	45	63	80	237	4.0%
<i>Metropolitan Home</i>	14	12	13	8	6	53	3.5%

continued

\* 2005 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						Ages 12–20 Audience Composition *
	2001	2002	2003	2004	2005	Total	
<b>Less than 15% (continued)</b>							
<i>Field &amp; Stream</i>	32	28	21	33	18	132	3.5%
<i>Natural History</i>	8	10	6	-	-	24	3.5% * 2003
<i>Ski</i>	34	49	31	28	36	178	3.4%
<i>Martha Stewart Living</i>	23	36	14	11	5	89	3.2%
<i>Salt Water Sportsman</i>	-	-	-	2	-	2	3.0% * 2004
<i>Food &amp; Wine</i>	141	174	114	119	123	671	3.0%
<i>Texas Monthly</i>	48	33	34	33	24	172	3.0%
<i>Motor Boating</i>	-	-	1	-	-	1	2.8% * 2003
<i>Money</i>	16	12	20	27	15	90	2.7%
<i>Victoria</i>	1	-	-	-	-	1	2.7% * 2001
<i>Forbes</i>	72	51	39	26	20	208	2.6%
<i>Atlantic Monthly</i>	19	8	15	13	8	63	2.5%
<i>Southern Living</i>	9	6	1	5	3	24	2.4%
<i>Golf Digest</i>	28	36	38	26	30	158	2.4%
<i>Bon Appetit</i>	68	58	35	58	60	279	2.3%
<i>Fortune</i>	50	44	46	59	47	246	2.2%
<i>Traditional Home</i>	-	-	4	5	-	9	2.1% * 2004
<i>Country Living</i>	-	-	-	-	5	5	2.0%
<i>Country Home</i>	-	-	-	6	5	11	2.0%
<i>Smart Money</i>	11	7	8	9	3	38	2.0%
<i>Coastal Living</i>	3	4	7	17	13	44	2.0%
<i>Conde Nast Traveler</i>	31	27	42	39	36	175	1.9%
<i>Spirit</i>	-	-	1	1	1	3	1.9%
<i>Cooking Light</i>	24	24	19	33	26	126	1.9%
<i>Gourmet</i>	37	58	63	63	74	295	1.8%
<i>The New Yorker</i>	76	94	101	90	84	445	1.7%
<i>Travel Holiday</i>	3	-	-	-	-	3	1.7% * 2001
<i>Architectural Digest</i>	10	18	19	20	21	88	1.7%
<i>Travel &amp; Leisure</i>	50	54	48	48	27	227	1.5%
<i>Prevention</i>	-	1	4	3	3	11	1.4%
<i>Smithsonian</i>	17	13	6	5	5	46	1.3%
<i>This Old House</i>	-	9	6	2	-	17	1.1% * 2004
<i>Hemispheres</i>	-	-	-	3	5	8	1.0%
<i>Midwest Living</i>	-	4	4	5	3	16	0.8%
<i>House Beautiful</i>	4	3	3	2	-	12	0.8% * 2004
<i>Sunset</i>	17	20	9	13	13	72	0.7%
<i>Endless Vacation</i>	-	-	-	-	4	4	0.7%
<i>Audubon</i>	1	-	-	-	-	1	0.6% * 2001
<i>Yachting</i>	2	5	7	7	12	33	0.6%
<i>Town &amp; Country</i>	4	8	12	1	2	27	0.5%
<i>House &amp; Garden</i>	15	16	25	15	4	75	0.4%
<i>Kiplinger's Personal Finance</i>	6	1	7	5	5	24	0.4%
<i>Family Handyman</i>	-	6	2	2	2	12	0.3%
<i>New York Magazine</i>	49	32	16	49	30	176	0.2%
<b>Total</b>	<b>3,616</b>	<b>3,598</b>	<b>3,241</b>	<b>3,283</b>	<b>2,897</b>	<b>16,635</b>	
Ads With Youth Composition Greater than 30%	60	116	129	94	9	408	
Ads With Youth Composition 15% to 30%	1,751	1,755	1,540	1,438	1,286	7,770	
Ads With Youth Composition Less than 15%	1,805	1,727	1,572	1,751	1,602	8,457	

\* 2005 unless noted; otherwise most recent year in which alcohol advertising was placed, and in which the publication's audience was measured by MRI. Sources: TNS Media Intelligence, 2001–2005; MRI Adult Studies, Spring 2002–2006; MRI TwelvePlus, 2001–2005; MRI Teenmark, 2001. Occurrence and audience data based on full-run editions only.

## Appendix D: Magazine Reach, Frequency and GRPs by Beverage Type, 2001–2005

### 2001

Type	Ages 12–20			Age 21+			Ages 21–34			Age 35+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	84.8%	22.1	1,870	76.3%	16.1	1,227	88.0%	23.4	2,064	71.0%	12.9	914
Distilled Spirits	93.4%	141.0	13,175	95.3%	104.0	9,916	98.0%	162.1	15,892	93.5%	82.1	7,680
Alcopops	60.6%	6.7	407	44.2%	5.6	250	66.1%	7.3	480	36.2%	4.5	164
Wine	56.6%	10.7	606	71.7%	19.0	1,359	75.8%	17.0	1,285	70.4%	19.7	1,386
<b>Total</b>	<b>94.0%</b>	<b>170.8</b>	<b>16,057</b>	<b>96.2%</b>	<b>132.5</b>	<b>12,752</b>	<b>98.2%</b>	<b>200.7</b>	<b>19,720</b>	<b>94.8%</b>	<b>107.1</b>	<b>10,144</b>

### 2002

Type	Ages 12–20			Age 21+			Ages 21–34			Age 35+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	81.1%	22.7	1,840	75.3%	15.6	1,171	88.6%	23.1	2,049	68.4%	12.3	842
Distilled Spirits	92.4%	122.6	11,324	95.8%	96.4	9,234	98.6%	150.2	14,809	93.6%	76.3	7,143
Alcopops	64.7%	10.3	668	47.1%	8.2	388	71.3%	11.0	787	35.5%	6.7	239
Wine	50.2%	10.8	544	73.0%	22.4	1,637	75.7%	21.2	1,604	71.1%	23.2	1,649
<b>Total</b>	<b>93.3%</b>	<b>154.1</b>	<b>14,376</b>	<b>96.9%</b>	<b>128.2</b>	<b>12,430</b>	<b>99.1%</b>	<b>194.2</b>	<b>19,249</b>	<b>95.7%</b>	<b>103.2</b>	<b>9,873</b>

### 2003

Type	Ages 12–20			Age 21+			Ages 21–34			Age 35+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	82.4%	29.4	2,425	81.4%	20.1	1,633	89.4%	32.2	2,881	77.1%	15.1	1,163
Distilled Spirits	91.4%	94.3	8,618	93.7%	76.8	7,194	97.0%	117.7	11,422	90.3%	62.0	5,601
Alcopops	50.3%	3.8	193	29.8%	3.4	101	51.0%	4.1	210	21.9%	2.7	60
Wine	43.2%	8.8	381	62.5%	18.1	1,134	65.6%	16.6	1,086	61.9%	18.6	1,152
<b>Total</b>	<b>92.7%</b>	<b>125.3</b>	<b>11,616</b>	<b>95.6%</b>	<b>105.3</b>	<b>10,062</b>	<b>98.3%</b>	<b>158.7</b>	<b>15,598</b>	<b>93.6%</b>	<b>85.2</b>	<b>7,976</b>

### 2004

Type	Ages 12–20			Age 21+			Ages 21–34			Age 35+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	84.7%	24.6	2,085	85.1%	21.3	1,812	93.6%	31.3	2,925	80.6%	17.3	1,396
Distilled Spirits	91.9%	86.2	7,921	94.5%	76.5	7,227	97.1%	108.0	10,488	92.7%	64.9	6,009
Alcopops	55.8%	7.9	443	50.4%	6.6	332	67.8%	8.0	545	45.4%	5.5	252
Wine	56.9%	10.2	578	71.1%	21.3	1,514	73.2%	17.9	1,311	69.7%	22.8	1,590
<b>Total</b>	<b>93.5%</b>	<b>117.9</b>	<b>11,026</b>	<b>97.2%</b>	<b>112.0</b>	<b>10,885</b>	<b>98.5%</b>	<b>155.0</b>	<b>15,270</b>	<b>95.9%</b>	<b>96.4</b>	<b>9,247</b>

### 2005

Type	Ages 12–20			Age 21+			Ages 21–34			Age 35+		
	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs	Reach	Freq	GRPs
Beer and Ale	79.6%	24.5	1,948	85.5%	21.4	1,827	93.1%	32.0	2,982	80.1%	17.5	1,401
Distilled Spirits	89.5%	62.2	5,570	94.3%	60.7	5,726	98.0%	88.7	8,693	92.4%	50.1	4,630
Alcopops	26.6%	2.3	62	23.6%	2.2	52	38.1%	2.5	97	18.1%	2.0	35
Wine	62.0%	10.0	621	77.6%	17.1	1,329	83.1%	16.2	1,349	75.2%	17.6	1,321
<b>Total</b>	<b>91.3%</b>	<b>89.8</b>	<b>8,200</b>	<b>97.5%</b>	<b>91.7</b>	<b>8,934</b>	<b>98.9%</b>	<b>132.7</b>	<b>13,120</b>	<b>96.3%</b>	<b>76.7</b>	<b>7,387</b>

Sources: TNS Media Intelligence, 2001–2005; MRI Adult Studies, Spring 2002–2006; MRI TwelvePlus, 2001–2005; MRI Teenmark, 2001.  
 Note: Sums of GRP columns may not match totals due to rounding.