

# DROWNED OUT: ALCOHOL INDUSTRY “RESPONSIBILITY” ADVERTISING ON TELEVISION, 2001–2005

## I. Executive Summary

There is growing concern among policymakers and the general public about the impact of messages from popular and commercial cultures on youth perceptions, attitudes and health behaviors. The U.S. Congress recently asked the Department of Health and Human Services to monitor and report on rates of youth exposure to advertising and other media messages that encourage and discourage alcohol use.<sup>1</sup> Alcohol companies place television advertisements in both of these categories. Alcohol product advertising on television and per capita youth exposure to that advertising experienced historic increases between 2001 and 2005. However, youth<sup>2</sup> exposure<sup>3</sup> to alcohol industry-sponsored “responsibility”<sup>4</sup>

advertisements remained at consistently low levels compared to their exposure to alcohol product commercials. For instance, from 2001 to 2005 youth were 239 times more likely to see a product advertisement for alcohol than an alcohol industry “responsibility” message about underage drinking and 32 times more likely to see an alcohol product advertisement than an industry-sponsored “responsibility” advertisement about drinking and driving or drinking safely. These findings come from an analysis by the Center on Alcohol Marketing and Youth (CAMY) of 1,415,716 alcohol product advertisements and 41,333 alcohol industry-supported “responsibility” advertisements aired on U.S. television between

2001 and 2005, as reported in data licensed from Nielsen Media Research.

Other major findings from CAMY’s analysis include:

- Alcohol companies spent \$4.9 billion on television advertising between 2001 and 2005. They spent 2.1% of this amount (\$104 million) on “responsibility” advertisements.
- Of the 109 alcohol companies advertising alcohol on television from 2001 to 2005, 8 companies aired “responsibility” advertising.
- Of the 56 alcohol companies advertising alcohol on television in 2005, the most recent year for which data

<sup>1</sup> *Sober Truth on Preventing Underage Drinking Act (STOP Act)*, Public Law 109–422, 109th Cong., 2d sess., 20 December 2006.

<sup>2</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>3</sup> In this report, calculations of youth and adult exposure to alcohol advertising are based on “gross rating points,” which measure how much an audience segment is exposed to advertising per capita. Another way of measuring advertising exposure is “gross impressions” (the total number of times all members of a given audience are exposed to advertising). The adult population will almost always receive far more gross impressions than youth because there are far more adults in the population than youth. 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 A for a glossary of terms.

<sup>4</sup> 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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June 27, 2007

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were available, 6 alcohol companies placed “responsibility” advertisements.

- Of the 300 alcohol brands that placed product advertising on television from 2001 to 2005, at a total

cost of \$4.7 billion, 25 brands placed “responsibility” advertising, at a total cost of \$104 million.

- More brands aired “responsibility” advertising in 2005 than in any prior year. Of the 174 alcohol

brands that placed product advertising on television in 2005, at a total cost of \$1 billion, 19 brands sponsored “responsibility” advertisements on television, at a total cost of \$28 million.

## II. Why the Concern

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Alcohol is the leading drug problem among America’s youth.<sup>5</sup> In 2005, there were nearly 11 million underage drinkers, and almost 7.2 million underage binge drinkers in the United States.<sup>6</sup> The Centers for Disease Control and Prevention (CDC) report that 45% of high school students reported drinking alcohol in the past month, while 29% reported binge drinking—typically defined as consuming five or more drinks on an occasion.<sup>7</sup>

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>8</sup> Each year, approximately 5,000 people under age 21 die from alcohol-related injuries involving underage drinking.<sup>9</sup> The highest prevalence of alcohol dependence (addiction to alcohol) in the U.S. population is among youth ages 18 to 20, who usually began drinking years earlier.<sup>10</sup>

According to the U.S. Surgeon General, delaying onset of drinking among young people as long as possible has the dual benefit of preventing tragedies due to underage drinking, while also reducing young people’s risks of alcohol problems later in life.<sup>11</sup>

A growing body of research studies has shown that the more young people are exposed to alcohol advertising, the more likely they are to drink or to increase their alcohol consumption.<sup>12</sup> Previous CAMY studies have shown that youth who saw alcohol advertising on television in 2005 were exposed to an average of 309 such advertisements. Each year from 2001 to 2005, between 20% and 25% of all alcohol product advertising placements were on programming that youth were more likely to be watching on a per capita basis than adults.<sup>13</sup>

## III. About this Report

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

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<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), 1.

<sup>6</sup> Substance Abuse and Mental Health Services Administration, *Results from the 2005 National Survey on Drug Use and Health: National Findings* (Rockville, Md.: Office of Applied Studies, 2006). Available at <http://www.oas.samhsa.gov/NSDUH/2k5NSDUH/2k5results.htm#3.2> (accessed 28 November 2006). “Binge drinking” is defined as having five or more drinks on the same occasion (i.e., at the same time or within a couple of hours of each other) on at least 1 day in the past 30 days.

<sup>7</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>8</sup> *Ibid.*

<sup>9</sup> U.S. Department of Health and Human Services, Office of the Surgeon General, *The Surgeon General’s Call to Action To Prevent and Reduce Underage Drinking* (Washington, D.C., 2007), 10.

<sup>10</sup> *Ibid.*, 2.

<sup>11</sup> *Ibid.*, 12.

<sup>12</sup> See e.g., 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 (2006): 18–24; R. Collins, P. Ellickson, D. McCaffrey, K. Hambersoomians, “Early Adolescent Exposure to Alcohol Advertising and its Relationship to Underage Drinking,” *Journal of Adolescent Health* 40, no. 6 (2007): 527–34; A.W. Stacy, J.B. Zogg, J.B. Unger, C.W. Dent, “Exposure to Televised Alcohol Ads and Subsequent Adolescent Alcohol Use,” *American Journal of Health Behavior* 28, no. 6 (2004): 498–509.

<sup>13</sup> Center on Alcohol Marketing and Youth, *Still Growing After All These Years: Youth Exposure to Alcohol Advertising on Television, 2001–2005* (Washington, D.C.: Center on Alcohol Marketing and Youth, 2006), 2.

Recent CAMY reports have documented that much of youth exposure to alcohol advertising comes in media that youth are more likely to be watching, on a per capita basis, than adults. For instance, in 2005, more than a third of youth exposure to alcohol advertising on television came from placements in publications or on programming with disproportionate youth audiences.<sup>14</sup> Nearly three-quarters of youth exposure to a sample of more than 67,000 radio commercials for alcohol in summer 2004 was on programming more likely to be heard by youth, on a per capita basis, than by adults age 21 and above.<sup>15</sup>

As a companion to its reports on youth exposure to alcohol product advertising on television, in magazines and on the radio, CAMY commissioned Virtual Media Resources, Inc. (VMR), a media planning and research firm in Natick, Massachusetts, to analyze the alcohol industry's televised "responsibility" advertisements in 2001, 2002, 2003, 2004 and 2005. 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. While many alcohol product advertisements have included brief or small voluntary warning messages, which research has found to be ineffective,<sup>16</sup> these were classified as product advertisements as long as the "responsibility" message was not the primary focus. CAMY has made no attempt to assess the effectiveness of the "responsibility" messages in the advertisements.

Advertising occurrence and audience data for this report came from Nielsen Monitor-Plus and Nielsen Media Research.<sup>17,18</sup> Nielsen Monitor-Plus is an industry-standard source for advertising occurrence and expenditure data. It provides date, time, source, program and spending data for each commercial occurrence both nationally (on cable and broadcast television networks) and locally (in 210 local or "spot" markets, also known as Designated Market Areas or DMAs). Nielsen Monitor-Plus uses passive pattern recognition to capture and identify all commercial activity. Nationally and in the larger 108 Full Discovery Markets (FDMs), all activity is captured and identified; for the smaller 102 Automated Discovery Markets (ADM), commercials are captured and identified only after they have first appeared nationally or in FDMs.

Nielsen Media Research measures television audiences for national networks and in 210 local markets. Nielsen measures national audiences using a sample of approximately 9,000 households, containing more than 18,000 people who have agreed to participate. Local market samples depend on market size and range from 400 to 800 households. Local audiences are measured using different methodologies:

- In 10 markets, Nielsen uses "people meters" (set-top devices that allow viewers to register their presence by clicking a button) to measure audience size and composition.
- In 46 markets, Nielsen uses a combination of "set meters" (set-top boxes that record television tuning) to determine household ratings and written diaries to determine audience composition.
- In 154 markets, Nielsen deploys only written diaries to determine both audience size and composition during the "sweeps" months, typically February, May, July and November.

"Responsibility" advertisements in this report were identified through a review process by staff at VMR. Every alcohol industry television advertisement reported by Nielsen Monitor-Plus for the years 2001 through 2005 was viewed and classified as product, "responsibility" or other (including corporate image advertising, civic and other community advertising, and advertisements promoting specific events).<sup>19</sup> "Responsibility" advertisements were then further classified by message and placed into one of two categories where the primary message concerned either 1) underage drinking or 2) warnings against driving after drinking or other safety or moderation messages.

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<sup>14</sup> Center on Alcohol Marketing and Youth, *Still Growing After All These Years*, 2.

<sup>15</sup> D. Jernigan, J. Ostroff, C. Ross, T.S. Naimi, R.D. Brewer, "Youth Exposure to Alcohol Advertising on Radio—United States, June–August 2004," *Morbidity and Mortality Weekly Report* 55, no. 34 (2006): 937–40.

<sup>16</sup> R.J. Fox, D.M. Krugman, J.E. Fletcher, P.M. Fischer, "Adolescents' Attention to Beer and Cigarette Print Ads and Associated Product Warnings," *Journal of Advertising* 27, no. 3 (1998): 57–68.

<sup>17</sup> This represents a change from earlier CAMY reports on alcohol industry "responsibility" advertising on television, which used TNS Media Intelligence (formerly known as CMR, or Competitive Media Reporting) for advertising occurrence data and Nielsen Media Research for audience data. As a result of the change in data source, the numbers in this report for years prior to 2004 may differ slightly from earlier CAMY reports on alcohol industry-funded "responsibility" advertising. CAMY would like to thank Gaye Pedlow and Carolyn Panzer of Diageo for providing information about Diageo's "responsibility" advertising, which allowed CAMY to classify more accurately that company's "responsibility" advertisements.

<sup>18</sup> © 2007 Nielsen Media Research, Inc. Ratings and other data contained herein are the copyrighted property of Nielsen Media Research, Inc. Unauthorized use of this copyrighted material is expressly prohibited. Violators may be subject to criminal and civil penalties under Federal Law (17 USC 101 et seq.). All Rights Reserved.

<sup>19</sup> Two advertisements – Jack Daniel's "Fashion" and Jack Daniel's "Friends" – have been classified on the Distilled Spirits Council of the United States (DISCUS) website (<http://www.discus.org/responsibility/videos.asp>) as "responsibility" advertisements but did not fit the definition used in this report (i.e. "responsibility" advertisements had as their primary focus a message about drinking responsibly, avoiding drinking and driving, or discouraging underage drinking), and were classified as product advertisements. Another advertisement on the DISCUS website – Jack Daniel's "Pace Yourself" – was not captured by Nielsen Monitor-Plus during 2005 and was therefore not included in this analysis. All other "responsibility" advertisements listed on the DISCUS website were included if they aired between 2001 and 2005.

“Responsibility” advertising expenditures and youth and adult audience exposure were calculated for each of the years from 2001 to 2005 as well as for the entire period combined. Delivery of the two audiences was measured using gross rating points, an industry-standard measure of audience exposure. Gross rating points are the product of “reach” times “frequency.” Reach describes the percentage of a given demographic group that has the opportunity to see a given advertisement or campaign through exposure to specific media. Frequency indicates the number of times individuals have an opportunity to see a given advertisement or campaign through exposure to specific media, and is most often expressed as an average number of exposures. (See Appendix A for a glossary of terms.)

This report includes all advertising bought on broadcast networks, national cable networks and local broadcast stations. It does not include advertising bought directly on regional/local cable networks, channels or systems, or on Spanish-language networks. It also does not include television advertising paid for by alcohol industry associations or industry-funded organizations, nor does it include alcohol company expenditures on alcohol education in venues outside of television advertising.

## IV. Alcohol Industry “Responsibility” and Product Advertising on Television, 2001–2005

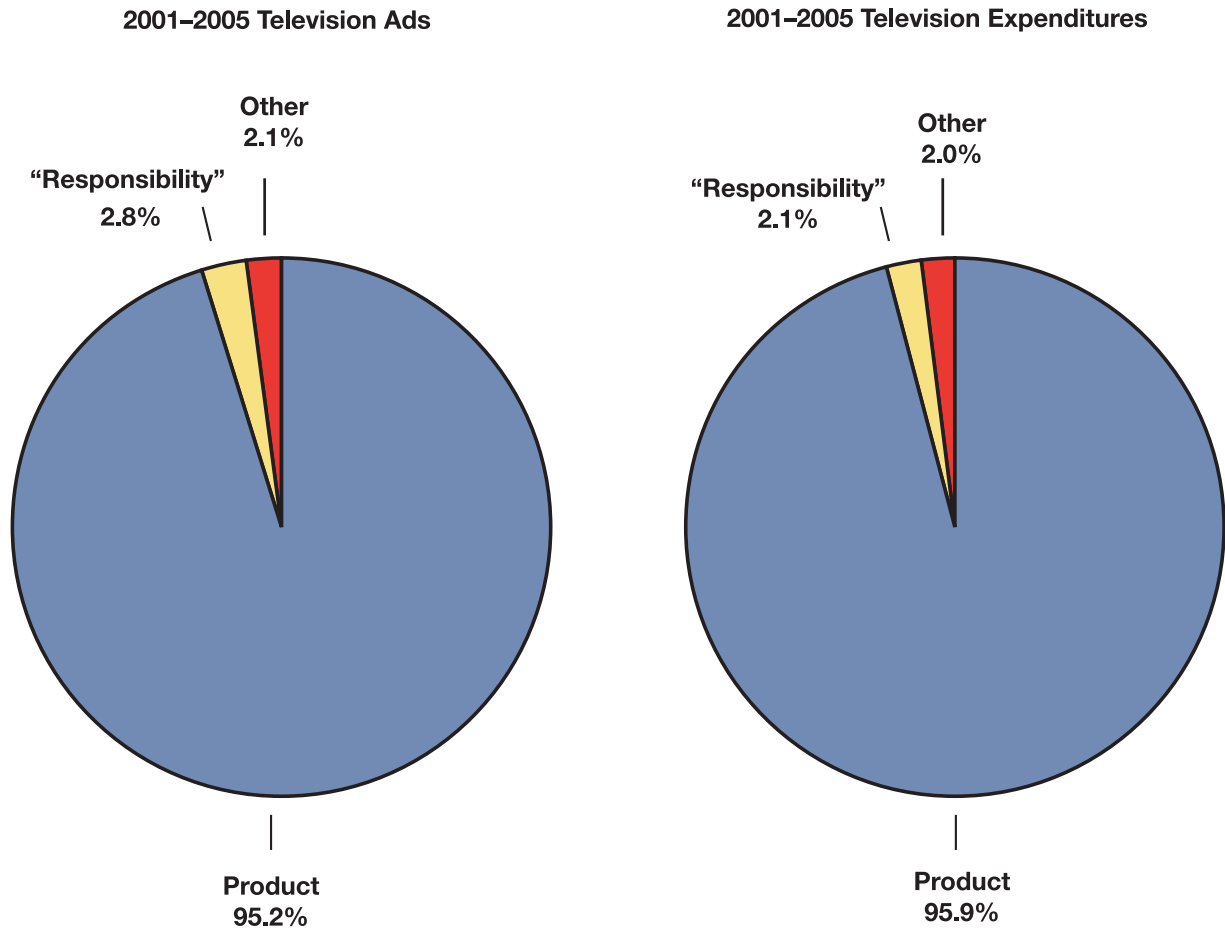
Table 1 provides a breakdown of alcohol advertising occurrences and spending in each of the three categories of televised alcohol advertising: product, “responsibility” and other. Figure 1 contrasts the magnitude of alcohol product advertising on television with the levels of spending and advertising occurrences for “responsibility” advertising and other advertisements, including corporate and event advertising.

**Table 1: Alcohol Industry Advertisements and Expenditures on Television by Advertisement Type, 2001–2005**

2001–2005				
Advertisement Type	Ads	% Ads	Expenditures	% Expenditures
Product	1,415,716	95.2%	\$4,693,873,917	95.9%
"Responsibility"	41,333	2.8%	\$104,123,656	2.1%
Other	30,640	2.1%	\$98,185,442	2.0%
<b>Total</b>	<b>1,487,689</b>	<b>100.0%</b>	<b>\$4,896,183,015</b>	<b>100.0%</b>
2005				
Advertisement Type	Ads	% Ads	Expenditures	% Expenditures
Product	305,384	93.4%	\$1,033,703,831	95.5%
"Responsibility"	12,386	3.8%	\$27,668,721	2.6%
Other	9,227	2.8%	\$20,826,049	1.9%
<b>Total</b>	<b>326,997</b>	<b>100.0%</b>	<b>\$1,082,198,601</b>	<b>100.0%</b>
2004				
Advertisement Type	Ads	% Ads	Expenditures	% Expenditures
Product	288,683	95.3%	\$988,322,281	95.6%
"Responsibility"	8,022	2.6%	\$17,667,481	1.7%
Other	6,114	2.0%	\$27,912,271	2.7%
<b>Total</b>	<b>302,819</b>	<b>100.0%</b>	<b>\$1,033,902,033</b>	<b>100.0%</b>
2003				
Advertisement Type	Ads	% Ads	Expenditures	% Expenditures
Product	290,933	97.7%	\$892,786,817	97.3%
"Responsibility"	3,263	1.1%	\$17,102,364	1.9%
Other	3,563	1.2%	\$7,927,703	0.9%
<b>Total</b>	<b>297,759</b>	<b>100.0%</b>	<b>\$917,816,884</b>	<b>100.0%</b>
2002				
Advertisement Type	Ads	% Ads	Expenditures	% Expenditures
Product	302,753	97.0%	\$998,960,044	96.3%
"Responsibility"	2,381	0.8%	\$11,976,354	1.2%
Other	7,029	2.3%	\$26,926,327	2.6%
<b>Total</b>	<b>312,163</b>	<b>100.0%</b>	<b>\$1,037,862,725</b>	<b>100.0%</b>
2001				
Advertisement Type	Ads	% Ads	Expenditures	% Expenditures
Product	227,963	91.9%	\$780,100,944	94.6%
"Responsibility"	15,281	6.2%	\$29,708,736	3.6%
Other	4,707	1.9%	\$14,593,092	1.8%
<b>Total</b>	<b>247,951</b>	<b>100.0%</b>	<b>\$824,402,772</b>	<b>100.0%</b>

Sources: Nielsen Media Research and Nielsen Monitor-Plus, 2001–2005. Columns may not add up due to rounding.

**Figure 1: Alcohol Industry Television Advertising by Advertisement Type, 2001–2005**



Source: Nielsen Media Research, 2001–2005. Percentages may not add up to 100% due to rounding.

Both in terms of advertisements and dollars, “responsibility” advertising as a percentage of total alcohol advertising on television was highest in 2001, fell dramatically in 2002 and has been rising slowly since. In 2005, 3.8% of alcohol advertisements and 2.6% of alcohol advertising dollars on television were for “responsibility” advertising.

Placements were analyzed both by brand and by parent alcohol company. Alcohol companies and brands placing “responsibility” advertisements on television were in the minority in the industry. Out of 300 alcohol brands advertising on television between 2001 and 2005, 25 placed “responsibility” advertisements. Those 300 brands came from 109 parent companies. As Table 2 shows, 8 of these parent companies placed “responsibility” advertising during this five-year period. In 2005, 56 parent companies aired alcohol advertising; 6 of these aired “responsibility” advertisements that year.

**Table 2: Alcohol Industry Product and "Responsibility" Advertising Expenditures on Television by Parent Company, 2001-2005**

2001-2005							
Parent Company	Spent on Product Advertising	% of Company Total	Spent on "Responsibility" Advertising	% of Company Total	Spent on Other Advertising	% of Company Total	Total Advertising Expenditures
Diageo plc	\$303,480,170	81.7%	\$65,918,649	17.7%	\$2,269,096	0.6%	\$371,667,915
Anheuser-Busch Companies, Inc.	\$1,615,535,651	95.8%	\$19,926,233	1.2%	\$51,599,164	3.1%	\$1,687,061,048
Molson Coors Brewing Co.	\$650,585,339	98.3%	\$10,768,647	1.6%	\$689,168	0.1%	\$662,043,154
Bacardi & Co. Ltd.	\$53,159,895	92.7%	\$3,883,721	6.8%	\$313,071	0.5%	\$57,356,687
InBev	\$31,616,823	94.4%	\$1,891,649	5.6%	\$0	0.0%	\$33,508,472
SABMiller plc	\$530,662,578	97.6%	\$965,035	0.2%	\$12,158,866	2.2%	\$543,786,479
Brown-Forman Corp.	\$19,099,096	96.2%	\$748,741	3.8%	\$0	0.0%	\$19,847,837
Constellation Brands Inc.	\$20,684,658	99.9%	\$20,981	0.1%	\$3,296	0.0%	\$20,708,935
Other Companies (101)	\$1,469,049,707	96.3%	\$0	0.0%	\$31,152,781	3.7%	\$1,500,202,488
<b>Industry Total</b>	<b>\$4,693,873,917</b>	<b>95.9%</b>	<b>\$104,123,656</b>	<b>2.1%</b>	<b>\$98,185,442</b>	<b>2.0%</b>	<b>\$4,896,183,015</b>
2005							
Parent Company	Spent on Product Advertising	% of Company Total	Spent on "Responsibility" Advertising	% of Company Total	Spent on Other Advertising	% of Company Total	Total Advertising Expenditures
Diageo plc	\$77,030,931	83.9%	\$14,746,689	16.1%	\$0	0.0%	\$91,777,620
Anheuser-Busch Companies, Inc.	\$362,327,805	93.5%	\$8,948,988	2.3%	\$16,304,858	4.2%	\$387,581,651
Bacardi & Co. Ltd.	\$35,660,334	92.5%	\$2,884,679	7.5%	\$0	0.0%	\$38,545,013
Brown-Forman Corp.	\$13,254,158	94.7%	\$739,967	5.3%	\$0	0.0%	\$13,994,125
Molson Coors Brewing Co.	\$132,159,584	99.7%	\$348,303	0.3%	\$113,871	0.1%	\$132,621,758
Constellation Brands Inc.	\$7,335,111	100.0%	\$95	0.0%	\$0	0.0%	\$7,335,206
Other Companies (50)	\$405,935,908	98.9%	\$0	0.0%	\$4,407,320	1.1%	\$410,343,228
<b>Industry Total</b>	<b>\$1,033,703,831</b>	<b>95.6%</b>	<b>\$27,668,721</b>	<b>2.5%</b>	<b>\$20,826,049</b>	<b>1.9%</b>	<b>\$1,082,198,601</b>
2004							
Parent Company	Spent on Product Advertising	% of Company Total	Spent on "Responsibility" Advertising	% of Company Total	Spent on Other Advertising	% of Company Total	Total Advertising Expenditures
Diageo plc	\$53,362,704	75.3%	\$16,605,957	23.4%	\$897,885	1.3%	\$70,866,546
Bacardi & Co. Ltd.	\$17,499,561	93.0%	\$999,042	5.3%	\$313,071	1.7%	\$18,811,674
Constellation Brands Inc.	\$13,349,547	99.8%	\$20,886	0.2%	\$3,296	0.0%	\$13,373,729
Anheuser-Busch Companies, Inc.	\$357,613,724	94.8%	\$32,822	0.0%	\$19,548,604	5.2%	\$377,195,150
Brown-Forman Corp.	\$5,844,938	99.9%	\$8,774	0.1%	\$0	0.0%	\$5,853,712
Other Companies (50)	\$540,651,807	98.7%	\$0	0.0%	\$7,149,415	1.3%	\$547,801,222
<b>Industry Total</b>	<b>\$988,322,281</b>	<b>95.6%</b>	<b>\$17,667,481</b>	<b>1.7%</b>	<b>\$27,912,271</b>	<b>2.7%</b>	<b>\$1,033,902,033</b>
2003							
Parent Company	Spent on Product Advertising	% of Company Total	Spent on "Responsibility" Advertising	% of Company Total	Spent on Other Advertising	% of Company Total	Total Advertising Expenditures
Diageo plc	\$61,003,144	78.4%	\$16,180,015	20.8%	\$601,146	0.8%	\$77,784,305
Anheuser-Busch Companies, Inc.	\$317,296,440	98.4%	\$921,610	0.3%	\$4,221,357	1.3%	\$322,439,407
Molson Coors Brewing Co.	\$155,277,435	100.0%	\$490	0.0%	\$33,725	0.0%	\$155,311,650
SABMiller plc	\$164,956,284	100.0%	\$249	0.0%	\$41,003	0.0%	\$164,997,536
Other Companies (55)	\$194,253,514	98.5%	\$0	0.0%	\$3,030,472	1.5%	\$197,283,986
<b>Industry Total</b>	<b>\$892,786,817</b>	<b>97.3%</b>	<b>\$17,102,364</b>	<b>1.9%</b>	<b>\$7,927,703</b>	<b>0.9%</b>	<b>\$917,816,884</b>
2002							
Parent Company	Spent on Product Advertising	% of Company Total	Spent on "Responsibility" Advertising	% of Company Total	Spent on Other Advertising	% of Company Total	Total Advertising Expenditures
Diageo plc	\$79,297,790	92.3%	\$5,806,158	6.8%	\$770,064	0.9%	\$85,874,012
Anheuser-Busch Companies, Inc.	\$337,722,808	95.5%	\$5,741,326	1.6%	\$10,192,385	2.9%	\$353,656,519
Molson Coors Brewing Co.	\$186,658,474	99.5%	\$417,207	0.2%	\$509,374	0.3%	\$187,585,055
SABMiller plc	\$198,621,242	96.9%	\$10,752	0.0%	\$6,294,561	3.1%	\$204,926,555
InBev	\$18,254,864	100.0%	\$911	0.0%	\$0	0.0%	\$18,255,775
Other Companies (51)	\$178,404,866	95.1%	\$0	0.0%	\$9,159,943	4.9%	\$187,564,809
<b>Industry Total</b>	<b>\$998,960,044</b>	<b>96.3%</b>	<b>\$11,976,354</b>	<b>1.2%</b>	<b>\$26,926,327</b>	<b>2.6%</b>	<b>\$1,037,862,725</b>
2001							
Parent Company	Spent on Product Advertising	% of Company Total	Spent on "Responsibility" Advertising	% of Company Total	Spent on Other Advertising	% of Company Total	Total Advertising Expenditures
Diageo plc	\$32,785,601	72.3%	\$12,579,830	27.7%	\$1	0.0%	\$45,365,432
Molson Coors Brewing Co.	\$176,489,846	94.6%	\$10,002,647	5.4%	\$32,198	0.0%	\$186,524,691
Anheuser-Busch Companies, Inc.	\$240,574,874	97.7%	\$4,281,487	1.7%	\$1,331,960	0.5%	\$246,188,321
InBev	\$13,361,959	87.6%	\$1,890,738	12.4%	\$0	0.0%	\$15,252,697
SABMiller plc	\$167,085,052	96.1%	\$954,034	0.5%	\$5,823,302	3.3%	\$173,862,388
Other Companies (34)	\$149,803,612	95.3%	\$0	0.0%	\$7,405,631	4.7%	\$157,209,243
<b>Industry Total</b>	<b>\$780,100,944</b>	<b>94.6%</b>	<b>\$29,708,736</b>	<b>3.6%</b>	<b>\$14,593,092</b>	<b>1.8%</b>	<b>\$824,402,772</b>

Source: Nielsen Media Research, 2001-2005

Alcohol industry-sponsored “responsibility” advertising delivered two kinds of messages on television from 2001 to 2005: messages about underage drinking, and warnings against driving after drinking or other safety or moderation messages. In the former category, messages ranged from a musician called Fat Joe rapping about not drinking until age 21 on behalf of Bacardi Rums and Pete Coors saying that even one teenager who drinks is one too many, to the band \*NSYNC going door to door encouraging parents to teach their children to wait until they are age 21 to drink.

The latter category included numerous “designated driver”<sup>20</sup> messages. In one such advertisement, a group of young people hijack a subway car to throw a Smirnoff Ice party, followed by the message, “Find your own designated driver.” This category also included warnings against driving after drinking and more general awareness messages such as Captain Morgan’s mascot saying, “Remember mates, party responsibly. Captain’s orders.”

**Table 3: Alcohol Industry Product and “Responsibility” Advertising on Television by Message Type, 2001–2005**

Message Type	2001–2005		2005		2004	
	Ads	Expenditures	Ads	Expenditures	Ads	Expenditures
Product	1,415,716	\$4,693,873,917	305,384	\$1,033,703,831	288,683	\$988,322,281
Underage Drinking	11,077	\$21,708,529	329	\$357,386	122	\$153,746
Drinking-Driving/Safety	30,256	\$82,415,127	12,057	\$27,311,335	7,900	\$17,513,735
“Responsibility” Total	41,333	\$104,123,656	12,386	\$27,668,721	8,022	\$17,667,481
<b>Proportion of Product to “Responsibility”</b>						
Product:Underage Drinking	128	216	928	2,892	2,366	6,428
Product:Drinking-Driving/Safety	47	57	25	38	37	56
Product:“Responsibility” Total	34	45	25	37	36	56
Message Type	2003		2002		2001	
	Ads	Expenditures	Ads	Expenditures	Ads	Expenditures
Product	290,933	\$892,786,817	302,753	\$998,960,044	227,963	\$780,100,944
Underage Drinking	350	\$856,501	769	\$5,610,966	9,507	\$14,729,930
Drinking-Driving/Safety	2,913	\$16,245,863	1,612	\$6,365,388	5,774	\$14,978,806
“Responsibility” Total	3,263	\$17,102,364	2,381	\$11,976,354	15,281	\$29,708,736
<b>Proportion of Product to “Responsibility”</b>						
Product:Underage Drinking	831	1,042	394	178	24	53
Product:Drinking-Driving/Safety	100	55	188	157	39	52
Product:“Responsibility” Total	89	52	127	83	15	26

Source: Nielsen Media Research, 2001–2005

From 2001 to 2005, alcohol companies spent 45 times more money on product advertising than on “responsibility” messages. This spending purchased 34 times more alcohol product advertisements than “responsibility” advertisements. As Table 3 shows, most of the “responsibility” messages placed by alcohol companies focused on driving after drinking or other safety-related messages. From 2001 to 2005, alcohol companies aired 128 times more product advertisements than advertisements warning about underage drinking. They spent 216 times more money on product advertising than on underage drinking advertisements. The companies spent 57 times more money on product advertising than on advertisements delivering drinking-driving or other safety-related messages. This spending bought 47 times more product advertisements than safety-related messages.

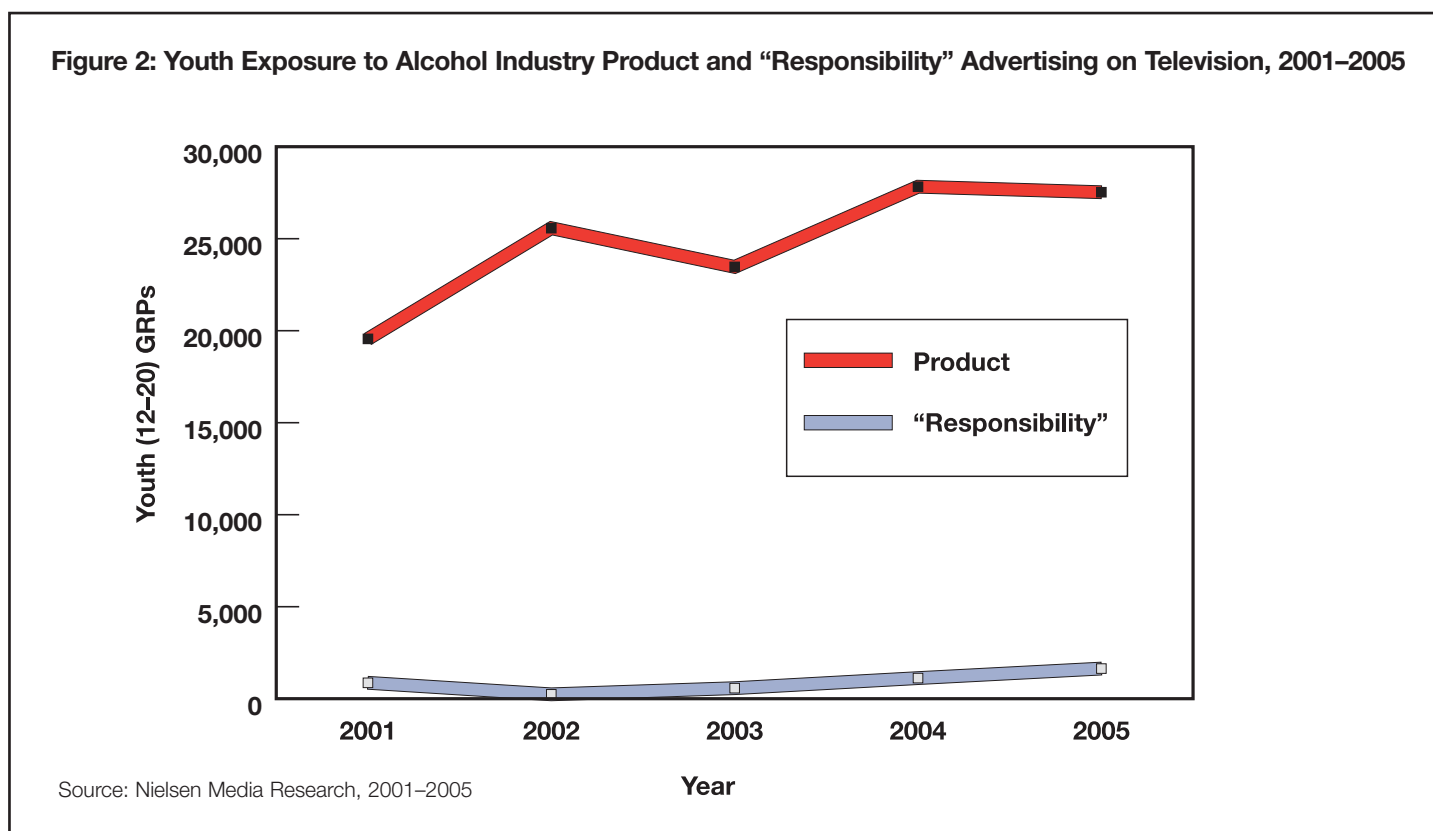
<sup>20</sup> A review of the research literature on the effects of population-based and drinking establishment-specific efforts to promote designated driver programs on alcohol consumption and alcohol-impaired driving concluded that, “The present evidence is insufficient to draw conclusions about the effectiveness of either type of designated driver promotion program evaluated.” S.M. Ditter, R.W. Elder, R.A. Shults, D.A. Sleet, R. Compton, J.L. Nichols, “Effectiveness of Designated Driver Programs for Reducing Alcohol-Impaired Driving,” *American Journal of Preventive Medicine* 28, no. 5S (2005): 280–87.

## V. Youth Exposure to Alcohol Industry “Responsibility” and Product Advertising, 2001–2005

CAMY used the same tools employed in its analyses of alcohol product advertising on television<sup>21</sup> to estimate levels of adult and youth exposure to “responsibility” messages funded by alcohol producers. Between 2001 and 2005, youth exposure to alcohol product advertising on television increased by 41%. For youth exposed to alcohol product advertising on television, the average number of advertisements they saw in a year increased from 217 in 2001 to 309 in 2005.

During the same period, the average number of advertisements seen by youth who viewed “responsibility” advertising on television grew from 11 to 21. Measured in gross rating points (GRPs), youth exposure to alcohol industry-funded “responsibility” advertising grew by 90%.

Figure 2 illustrates the continued wide gap in youth exposure to alcohol product and “responsibility” advertising.



From 2001 to 2005, using GRPs to express the likelihood of youth seeing alcohol product versus “responsibility” messages, youth were 28 times more likely to see an alcohol product advertisement than an industry-sponsored “responsibility” advertisement. They were 239 times more likely to see an alcohol product advertisement than an alcohol company advertisement about underage drinking, and 32 times more likely to see the industry’s advertisements promoting its products than to view industry-sponsored messages about driving after drinking and other alcohol-related safety issues.

Some of the alcohol companies’ messages about underage drinking (approximately 20% of the total advertisements in this category) appeared designed to reach parents rather than youth. As Table 4 shows, from 2001 to 2005 people age 35 and above (the age of many parents) were the most likely to see the industry’s advertisements about underage drinking, while 21 to 34 year-olds had the greatest exposure to the industry’s messages about drinking-driving and safety.

<sup>21</sup> See e.g., Center on Alcohol Marketing and Youth, *Still Growing After All These Years*.



**Table 4: Youth vs. Adult Exposure to “Responsibility” Advertising by Message Type, 2001–2005**

2001–2005 GRPs					GRP Ratios		
Message Type	Ages 12–20	Age 21+	Ages 21–34	Age 35+	12–20/21+	12–20/21–34	12–20/35+
Underage Drinking	519	785	768	791	0.66	0.67	0.66
Drinking-Driving/Safety	3,913	5,093	5,302	5,016	0.77	0.74	0.78
“Responsibility” Total	4,432	5,878	6,071	5,807	0.75	0.73	0.76
Product	123,949	195,308	192,736	196,221	0.63	0.64	0.63
<b>Proportion of Product to “Responsibility”</b>							
Product:Underage Drinking	239	249	251	248			
Product:Drinking-Driving/Safety	32	38	36	39			
Product:“Responsibility” Total	28	33	32	34			

2005 GRPs					GRP Ratios		
Message Type	Ages 12–20	Age 21+	Ages 21–34	Age 35+	12–20/21+	12–20/21–34	12–20/35+
Underage Drinking	81	62	81	56	1.30	1.00	1.46
Drinking-Driving/Safety	1,556	2,002	2,065	1,979	0.78	0.75	0.79
“Responsibility” Total	1,638	2,064	2,147	2,034	0.79	0.76	0.80
Product	27,526	45,728	42,703	46,812	0.60	0.64	0.59
<b>Proportion of Product to “Responsibility”</b>							
Product:Underage Drinking	338	732	525	841			
Product:Drinking-Driving/Safety	18	23	21	24			
Product:“Responsibility” Total	17	22	20	23			

2004 GRPs					GRP Ratios		
Message Type	Ages 12–20	Age 21+	Ages 21–34	Age 35+	12–20/21+	12–20/21–34	12–20/35+
Underage Drinking	31	33	33	33	0.92	0.93	0.92
Drinking-Driving/Safety	1,089	1,254	1,391	1,204	0.87	0.78	0.90
“Responsibility” Total	1,120	1,287	1,424	1,237	0.87	0.79	0.91
Product	27,826	43,257	43,326	43,234	0.64	0.64	0.64
<b>Proportion of Product to “Responsibility”</b>							
Product:Underage Drinking	911	1,302	1,316	1,296			
Product:Drinking-Driving/Safety	26	34	31	36			
Product:“Responsibility” Total	25	34	30	35			

2003 GRPs					GRP Ratios		
Message Type	Ages 12–20	Age 21+	Ages 21–34	Age 35+	12–20/21+	12–20/21–34	12–20/35+
Underage Drinking	17	40	28	44	0.43	0.62	0.39
Drinking-Driving/Safety	556	813	849	799	0.68	0.65	0.70
“Responsibility” Total	573	852	877	843	0.67	0.65	0.68
Product	23,469	35,577	36,216	35,333	0.66	0.65	0.66
<b>Proportion of Product to “Responsibility”</b>							
Product:Underage Drinking	1,365	899	1,303	805			
Product:Drinking-Driving/Safety	42	44	43	44			
Product:“Responsibility” Total	41	42	41	42			

2002 GRPs					GRP Ratios		
Message Type	Ages 12–20	Age 21+	Ages 21–34	Age 35+	12–20/21+	12–20/21–34	12–20/35+
Underage Drinking	51	122	94	132	0.42	0.55	0.39
Drinking-Driving/Safety	187	286	290	284	0.65	0.64	0.66
“Responsibility” Total	238	407	384	416	0.58	0.62	0.57
Product	25,572	39,780	39,735	39,805	0.64	0.64	0.64
<b>Proportion of Product to “Responsibility”</b>							
Product:Underage Drinking	499	326	425	301			
Product:Drinking-Driving/Safety	137	139	137	140			
Product:“Responsibility” Total	108	98	104	96			

2001 GRPs					GRP Ratios		
Message Type	Ages 12–20	Age 21+	Ages 21–34	Age 35+	12–20/21+	12–20/21–34	12–20/35+
Underage Drinking	338	527	533	525	0.64	0.64	0.64
Drinking-Driving/Safety	525	739	707	751	0.71	0.74	0.70
“Responsibility” Total	864	1,267	1,240	1,276	0.68	0.70	0.68
Product	19,556	30,966	30,756	31,037	0.63	0.64	0.63
<b>Proportion of Product to “Responsibility”</b>							
Product:Underage Drinking	58	59	58	59			
Product:Drinking-Driving/Safety	37	42	44	41			
Product:“Responsibility” Total	23	24	25	24			

Source: Nielsen Media Research, 2001–2005. GRPs may not add up due to rounding.

## VI. Conclusion

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Youth see far more alcohol product advertising on television than they do alcohol industry-sponsored “responsibility” messages. Youth exposure to both alcohol product and “responsibility” messages increased from 2001 to 2005, but the huge gap between the amount of product and the amount of “responsibility” advertising seen by youth persisted.

In 2003, in the context of a Congressionally-mandated review of programs to prevent and reduce underage drinking, the National Research Council (NRC) and Institute of Medicine (IOM) concluded that “in the absence of documented evidence of effectiveness from independent evaluation, skepticism about the value of industry-sponsored programs is likely to continue.”<sup>22</sup> A search of the on-line research database PubMed found no published evaluations of the effectiveness of industry-sponsored programs in the peer-reviewed public health literature since that time, and no industry-sponsored programs are listed in the Substance Abuse and Mental Health Services Administration’s National Registry of Effective Prevention Programs.<sup>23</sup> Research into the effects of tobacco company-funded messages on smoking behavior and attitudes among youth found that youth exposure to youth-targeted advertising had no beneficial effects on young people, and youth exposure to parent-targeted advertising was associated with lower perceived harm from smoking, stronger approval of smoking and greater likelihood of having smoked in the past month.<sup>24</sup>

There is evidence that media campaigns can make a difference in reducing and preventing drug use and problems among youth. Youth exposure to anti-smoking messages from non-industry-funded campaigns has been shown to be a factor in the decline of youth smoking.<sup>25</sup> The federal government has spent hundreds of millions of dollars on youth anti-drug media campaigns in recent years, and at least some of that effort has shown effects.<sup>26</sup>

In their 2003 report, the NRC and IOM assessed the potential for using the mass media to reduce underage drinking. They concluded by calling for a media campaign that would be “designed to animate and sustain a broad, deep, societal commitment to reduce underage drinking.”<sup>27</sup> They recommended that this campaign be funded at a level roughly equivalent to the \$100 million per year being spent on the Office of National Drug Control Policy’s anti-drug campaign and the American Legacy Foundation’s anti-tobacco campaign.<sup>28</sup>

In March 2007, the U.S. Surgeon General recommended that governments and policymakers “focus as much attention on underage drinking as on tobacco and illicit drugs, making it clear that underage alcohol use is an important public health problem.”<sup>29</sup> Public funding for media messages about underage alcohol use is low compared with what is spent on other youth drug problems. In 2004, Congress gave the Ad Council \$800,000 to begin a small national public service advertising campaign on underage drinking, and provided \$250,000 in 2005 and \$850,000 the next two years.

In December 2006, President Bush signed into law the Sober Truth on Preventing Underage Drinking Act, also known as the STOP Act. This act authorized \$1 million for a national media campaign on underage drinking. It also requires the Department of Health and Human Services to report annually to Congress on underage drinking, including the rate of exposure of youth to messages encouraging and discouraging alcohol use. The STOP Act is authorizing legislation; Congress this year is considering whether it will fund these activities.

This report underscores the need for the activities outlined in the STOP Act. A well-funded national media campaign could counterbalance the wealth of messages encouraging alcohol use to which youth are exposed. Ongoing, independent monitoring of youth exposure to messages about alcohol will provide parents, teachers and policymakers with an accurate picture of the message environment in which youth make decisions about alcohol use.

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<sup>22</sup> National Research Council and Institute of Medicine, 130.

<sup>23</sup> Stephen Wing, Substance Abuse and Mental Health Services Administration, e-mail to David Jernigan, 11 April 2007.

<sup>24</sup> M. Wakefield, Y. Terry-McElrath, S. Emery, H. Saffer, F.J. Chaloupka, G. Szczytko, B. Flay, P.M. O’Malley, L.D. Johnston, “Effect of Televised, Tobacco Company-Funded Smoking Prevention Advertising on Youth Smoking-Related Beliefs, Intentions, and Behavior,” *American Journal of Public Health* 96, no. 12 (2006): 2154–60.

<sup>25</sup> See e.g., M.C. Farrelly, K.C. Davis, M.L. Havillan, P. Messeri, C.G. Heaton, “Evidence of a Dose-Response Relationship Between “truth” Antismoking Ads and Youth Smoking Prevalence,” *American Journal of Public Health* 95, no. 3 (2005): 425–31; J.C. Hersey, J. Niederdeppe, S.W. Ng, P. Mowery, M. Farrelly, P. Messeri, “How state counter-industry campaigns help prime perceptions of tobacco industry practices to promote reductions in youth smoking,” *Tobacco Control* 14, no. 6 (2005): 377–83.

<sup>26</sup> See e.g., P. Palmgreen, E.P. Lorch, M.T. Stephenson, R.H. Hoyle, L. Donohew, “Effects of the Marijuana Initiative Campaign on High-Sensation-Seeking Adolescents,” *American Journal of Public Health* (2007): [Epub ahead of print], available at <http://www.ajph.org/cgi/content/abstract/AJPH.2005.072843v1>, accessed 18 April 2007.

<sup>27</sup> National Research Council and Institute of Medicine, 105.

<sup>28</sup> *Ibid.*, 247.

<sup>29</sup> U.S. Department of Health and Human Services, Office of the Surgeon General, 45.

## Acknowledgments

The Center on Alcohol Marketing and Youth would like to thank the following researchers for their independent review of this report. The opinions expressed in this report are those of the authors and do not necessarily reflect those of the funders or reviewers.

William DeJong, Professor of Social and Behavioral Sciences, Boston University School of Public Health; former Director, Center for College Health and Safety, Education Development Center, Inc.

Stu Gray, former Senior Vice President, Director of Media Resources, BBDO New York; and former Member of the Board of Directors, Advertising Research Foundation.

Joni Sims, media researcher and consultant; former Partner, Ogilvy & Mather/Mindshare, and former Senior Client Executive, Nielsen Media Research.

# APPENDIX A: GLOSSARY OF ADVERTISING TERMS

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## Rating

Audience as a percentage of a universe estimate.

## Universe Estimate

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

## Impressions

An advertising impression occurs when one person sees or hears an advertisement. If this advertisement 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 advertisement 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 advertising campaign, or for any other combination of advertisements, is called gross impressions—so-called because they include multiple exposures for some or all of the people who are exposed to the advertising. If five people see the same advertisement 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. In advertising math, reach x frequency = GRPs: 75 reach (% of the potential audience) x 6.8 frequency (average number of exposures) = 510 GRPs.

## 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 advertisements. 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 2 to 20, and 80,000 are age 21 and over. In that case, the composition of the audience is calculated by looking at the percentage of the audience that meets different demographic criteria. In this example, the audience composition is 20% ages 2 to 20 and 80% age 21 and over.