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ABSTRACT

Through the years and every passing fad, radio has continued to be a basic fact of life for youth in the United States. The Center on Alcohol Marketing and Youth commissioned Virtual Media Resources (VMR) to audit alcohol radio advertising in 2001 and 2002 and to conduct a case study of alcohol radio advertising in December 2002 and January 2003 to validate the audit findings. In analyzing the results of the audit and case study, the Center finds that the alcohol industry routinely overexposed youth to its radio advertising by placing the ads when and where youth were more likely than adults to hear them. In analyzing the sample from 2001-2002, the Center specifically finds: youth heard more radio ads for beer, "malternatives" and distilled spirits; youth heard substantially less radio advertising for wine; alcohol ads were placed on stations with "youth" formats; alcohol ads were aired when youth listen most; overexposure by brand was extensive; and youth in African-American and Hispanic communities were overexposed. Five appendixes contain research methodology and data tables. (GCP)

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Radio Daze: Alcohol Ads Tune in Underage Youth

The Center on Alcohol
Marketing and Youth

April, 2003

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RADIO DAZE:

Alcohol Ads Tune in Underage Youth

Executive Summary

Through the years and every passing fad, radio has continued to be a basic fact of life for youth in the United States. Consider this: 99.2% of teenagers (defined as ages 12-17) listen to radio every week—a higher percentage than for any other age group—and 80.6% listen to radio every day.¹ Over the course of a week, the average teenager will listen to 13.5 hours of radio.² By comparison, he or she will spend 10.6 hours per week watching television, 7.6 hours online, and 3.3 hours reading magazines for pleasure.³ For African-American and Hispanic teenagers, radio's influence is even more impressive, with average teens listening for 18.25 and 17.75 hours a week respectively.⁴

The Center on Alcohol Marketing and Youth commissioned Virtual Media Resources (VMR) to audit alcohol radio

advertising in 2001 and 2002 and to conduct a case study of alcohol radio advertising in December 2002 and January 2003 to validate the audit findings. In analyzing the results of the audit and case study, the Center finds that the alcohol industry routinely overexposed youth⁵ to its radio advertising by placing the ads when and where youth were more likely than adults to hear them.

In analyzing the sample from 2001-2002, the Center specifically finds:

- **Youth heard more radio ads for beer, “malternatives” and distilled spirits.** Radio ads for beer, for the so-called low-alcohol refreshers⁶ popularly known as “malternatives” or “alcopops,” and for distilled spirits were more effectively delivered to youth than to adults.

- **Youth heard substantially less radio advertising for wine.** Ads for wine were overwhelmingly more effectively delivered to adults than to youth, showing how advertisers can target an adult audience without overexposing youth.
- **Alcohol ads were placed on stations with “youth” formats.** Seventy-three percent of the alcohol radio advertising in terms of gross ratings points (GRPs)⁷ was on four formats —Rhythmic Contemporary Hit, Pop Contemporary Hit, Urban Contemporary and Alternative—that routinely have a listening audience of 12- to 20-year-olds greater than the proportion of 12- to 20-year-olds in the population of a particular market.
- **Alcohol ads were aired when youth listen most.** Youth were overexposed

¹ Radio Advertising Bureau, *Radio Marketing Guide & Fact Book for Advertisers*, 2002-2003 ed. (New York: Radio Advertising Bureau, 2002), 4-5; Arbitron, Fall 2001.

² Radio Advertising Bureau, 8; Arbitron, Fall 2001.

³ Teenage Research Unlimited, Spring 2002, Wave 39.

⁴ Radio Advertising Bureau, 9, 10; Arbitron, Fall 2001.

⁵ For this report, unless otherwise noted, youth are defined as persons ages 12-20, and adults are defined as persons ages 21 and over.

⁶ Many of the beverages in this category contain 5% alcohol, more than most beers.

⁷ GRPs are used to measure the total audience exposed to advertising. For instance, 1,000 GRPs may mean that 50% of an audience heard an ad an average of 20 times over a given period, or that 80% of that audience heard an ad an average of 12.5 times over that period. See Appendix A for how GRPs were calculated.

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The Center on
Alcohol Marketing and *Youth*

April 2, 2003

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to alcohol radio advertising during two of the four “dayparts”⁸ monitored. The two dayparts that did not consistently overexpose youth were morning “drive-time” (6 a.m. to 10 a.m., Monday through Friday), a time typically listened to by weekday commuters and office workers, and weekday daytime (10 a.m. to 3 p.m., Monday through Friday).

- **Overexposure by brand was extensive.** Sixty-three of 160 alcohol brands delivered more radio advertising to underage youth than to adults of legal drinking age, and 20 of the 160 brands even delivered more radio advertising to youth than to young adults ages 21-34, an age group the alcohol industry routinely describes as its target audience.⁹ Across all brands, 39% of the 87,094 radio ads were more likely to be heard by youth than by adults.

- **Youth in African-American and Hispanic communities were overexposed.** These findings were also seen in the African-American and Hispanic radio audiences. For instance, Hispanic youth heard 34% more beer and ale advertising on radio than Hispanic adults, and as much beer and ale advertising on radio was delivered to African-American youth as to African-American adults.

Why the Concern

The consequences of underage drinking are real and tragic. Alcohol use plays a substantial role in all three leading causes of death among youth—unintentional injuries (including motor vehicle fatalities and drownings), suicides and homicides.¹⁰ Children who begin drinking before the age of 15 are four times more

likely to develop alcohol dependence than those who wait until the age of 21.¹¹ Underage drinking in the United States is marked by abuse. The vast majority of the alcohol consumed by young people is for the purposes of intoxication: 92% of the alcohol drunk by 12- to 14-year-olds and 96% of the consumption by 15- to 17-year-olds and 18- to 20-year-olds is done when drinkers are having five or more drinks at one time.¹²

The Federal Trade Commission (FTC) has noted that, “while many factors may influence an underage person’s drinking decisions, including among other things parents, peers and media, there is reason to believe that advertising also plays a role.”¹³ Research studies have found that exposure to and liking of alcohol advertisements affect young people’s beliefs about drinking, intentions to drink, and actual drinking behavior.¹⁴

Center on Alcohol Marketing and Youth

www.camy.org

The Center on Alcohol Marketing and Youth at Georgetown University monitors the marketing practices of the alcohol industry to focus attention and action on industry practices that jeopardize the health and safety of America’s youth. Reducing high rates of underage alcohol consumption and the suffering caused by alcohol-related injuries and deaths among young people requires using the public health strategies of limiting the access to

and the appeal of alcohol to underage persons.

The Center is supported by grants from The Pew Charitable Trusts and the Robert Wood Johnson Foundation to Georgetown University.

Virtual Media Resources

Virtual Media Resources (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 marketers, and has grown to service over 100 clients across the U.S. and Canada, in retail, publishing, finance, automotive, public health and other fields.

⁸ A daypart is a segment of a radio station’s broadcast day, usually split up on weekdays into time periods of morning (6 a.m. to 10 a.m.), midday (10 a.m. to 3 p.m.), afternoon (3 p.m. to 7 p.m.), and evening (7 p.m. to midnight).

⁹ See e.g., Howard Riell, “Half Full or Half Empty?,” *Beverage Dynamics*, 112, no. 3 (May 1, 2002): 8; Rebecca Zimoch, “Malternatives: A new brew rides to the rescue,” *Grocery Headquarters* 68, no. 4 (April 1, 2002): 83; Sarah Theodore, “Beer’s on the up and up,” *Beverage Industry* 92, no. 4 (April 1, 2001): 18.

¹⁰ Laura Kann et al, “Youth Risk Behavior Surveillance — United States, 1999,” *Morbidity and Mortality Weekly Report* 49 (2000): 1-96.

¹¹ B.F. Grant and D.A. Dawson, “Age at onset of alcohol use and its association with DSM-IV alcohol abuse and dependence: Results from the National Longitudinal Alcohol Epidemiologic Survey,” *Journal of Substance Abuse* 9 (1997): 103-110.

¹² Pacific Institute for Research and Evaluation, *Drinking in America: Myths, Realities, and Prevention Policy*, prepared in support of the Office of Juvenile Justice Delinquency Prevention Enforcing the Underage Drinking Laws Program, U.S. Department of Justice (Calverton: Pacific Institute for Research and Evaluation, 2002).

¹³ Federal Trade Commission, *Self-Regulation in the Alcohol Industry: A Review of Industry Efforts to Avoid Promoting Alcohol to Underage Consumers* (Washington, D.C.: FTC, 1999), 4.

¹⁴ Joel Grube, “Television alcohol portrayals, alcohol advertising and alcohol expectancies among children and adolescents,” in *Effects of the Mass Media on the Use and Abuse of Alcohol*, eds. S.E. Martin and P. Mail (Bethesda: National Institute on Alcohol Abuse and Alcoholism), 105-121; S.E. Martin et al, “Alcohol advertising and youth,” *Alcoholism: Clinical and Experimental Research* 26, no. 6 (2002): 900-906.

About This Report

VMR adhered to industry-standard methodologies in conducting this analysis, using standard industry sources including Media Monitors (MMI), a service that provides advertising occurrence information in 19 radio markets; Arbitron Ratings, a service that provides audience estimates on almost every radio station in approximately 300 markets across the United States; Video Monitoring Services (VMS) and Broadcast Verification Service (BVS), which track radio ads' first occurrences and repeating occurrences, respectively; and Miller Kaplan Associates (MKA), a firm that reports radio advertising expenditures in 32 markets.

Because of the sheer number of radio stations in the United States and the economics of media research, there is no comprehensive monitoring service that provides data—in terms of either audience estimates or ads—for all of them. VMR analyzed a major market sample, drawn by MMI, of alcohol radio ads in 2001 and 2002 that tracked the actual placement of 87,094 ads in 19 leading markets across the nation and integrated these data with audience information from Arbitron to assess who listened to what, when. In addition, VMR then conducted an in-depth analysis of 11,712 ad placements for five alcohol brands in 63 markets from December 15, 2002 to January 31, 2003. This case study confirmed and amplified the findings from the nationwide sample.

MMI, the most comprehensive available source for monitoring radio advertising occurrence data, does not differentiate among ad message types and makes no distinction between product and non-product advertising messages, such as so-called responsibility ads or corporate goodwill ads. Similarly, the most reliable source for radio advertising expenditures, MKA, does not distinguish among message types, but only reports total brand or parent company expenditures within each market. Therefore, all alcohol radio advertising from June 2001-December 2002 for which the “first occurrence” was captured by VMS was analyzed. Of the 788 unique radio commercials for alcohol that were tracked by VMS over this period, there were 20, or 2.5% of the total, that may be classified as non-product advertising. This analysis suggests that the proportion of alcohol ads tracked by MMI that may be non-product ads is minimal. MMI also does not monitor Spanish-language radio stations in its principal monitoring database, and thus this report analyzes only the exposure of Hispanic populations to advertising on English-language as opposed to Spanish-language outlets.

More detailed information about these sources and the methodology used to create this report is included in Appendix A. It is critical to note, however, that these sources reflect a conservative estimate of youth exposure to alcohol advertising on radio; because of limita-

tions on the number of markets sampled, the monitored dayparts, and the frequency of monitoring, the actual scope of alcohol advertising is substantially greater than what is reported here. We estimate that the actual amount of radio advertising for alcohol is approximately eight times what is reported by MMI within the 19 sampled markets.¹⁵

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Anna Fountas
Former President, Simmons Market Research Bureau and the Traffic Audit Bureau; former Vice President, Arbitron Ratings

Joni Sims
Media Researcher and Consultant; former Partner, Ogilvy & Mather/Mindshare; former Senior Client Executive, Nielsen Media Research

Michael Siegel, MD, MPH
Associate Professor, Boston University School of Public Health

¹⁵ Within the three markets that monitor until 11 p.m., the proportion of youth GRPs after 7 p.m. is 21%. These markets represent 48% of youth alcohol GRPs within the 19 measured markets. If the GRPs in the remaining markets were adjusted to reflect a comparable proportion of 7 p.m. to 11 p.m. ad occurrences (dividing the total GRPs by .79), and GRPs in all markets were then multiplied by 7 (since only one day per week is sampled by MMI), the resulting total youth 12-20 GRPs for 2001-2002 would be 40,579, or eight times the sampled total. This estimate does not reflect GRPs for any weekday advertising after 11 p.m., which is not monitored by MMI in any market, or for stations not sampled by MMI.

I. Introduction

Radio boasts about being the medium that accompanies Americans “24-7”—at home, in our cars, and at work and play.¹⁶ Moreover, for advertisers, radio offers:

- targeted selection of an audience, because station formats appeal to narrow demographics;¹⁷
- great potential to reach a targeted audience, usually more than 90% of a particular demographic group;¹⁸ and
- substantial repetition of advertising exposure, because radio is an affordable medium with regular listeners who spend a lot of time with their favorite stations.¹⁹

The alcohol industry has steadily increased its reported spending on radio advertising over the last three years in markets where radio ad spending is tracked, from \$176 million in 2000 to \$195 million in 2001 to \$218 million in 2002.²⁰ The 2002 spending figures are the reported expenditures in 32 leading markets across the country that represent 47% of the population age 12 and over; 2000 expenditures are from 25 markets representing 39% of the population, and 2001 expenditures are from 27 markets representing 41% of the population.

In the 25 markets measured by MKA from 2000 through 2002, alcohol radio expenditures increased from \$175.5 million in 2000 to \$194.3 million in 2002, an increase of 10.7%.²¹ On network radio, measured by CMR, the industry spent an additional \$7.7 million in 2000, \$8.6 million in 2001 and \$9.2 million in 2002 through September.²² Network radio is not analyzed in this report because ad occurrence data that can be compared with audience ratings data is generally not available. CMR data were not used to generate any expenditure estimates for this report; spot radio ad spending reported by CMR, which is based on data provided by selected radio advertising representatives, represents only a fraction of actual expenditures.

The beer industry dominates radio alcohol advertising, accounting for 81% of the dollars spent in the 25 markets in 2000, 79% in 2001 and 81% in 2002. Distilled spirits advertising ranks second with 15% of 2002 expenditures, while wine ranks third. Low-alcohol refreshers, while fourth in terms of dollars, had the largest percentage increase for each of the past two years—an indication of the alcohol industry’s attempt to create and sustain this market.

Table 1: Alcohol Spot Radio Spending Trends

Beverage Category	2000 (25 Markets)		2001 (27 Markets)		2002 (32 Markets)	
	Spending	% Total	Spending	% Total	Spending	% Total
Beer	142,318,236	81%	153,049,717	79%	176,288,846	81%
Distilled Spirits	22,055,845	13%	31,995,358	16%	31,827,040	15%
Low-Alcohol Refreshers	716,740	0%	2,224,918	1%	3,100,962	1%
Wine	10,456,742	6%	7,452,031	4%	6,636,951	3%
Total	175,547,563	100%	194,722,024	100%	217,853,799	100%
Trending				Change vs. 2000		Change vs. 2001
25 Comparable Markets	175,547,563		193,499,635	10.2%	194,323,227	0.4%
27 Comparable Markets	--		194,722,024		202,746,517	4.1%

2000: 25 Markets, 38.7% U.S. population age 12+
 2001: 27 Markets, 40.5% U.S. population age 12+
 2002: 32 Markets, 46.6% U.S. population age 12+

Source: Miller Kaplan Associates

¹⁶ Mike Mahone and Mary Bennett, introduction to *Radio Marketing Guide & Fact Book for Advertisers*, 2002-2003 ed. (New York: Radio Advertising Bureau, 2002).

¹⁷ Radio Advertising Bureau, 36.

¹⁸ *Ibid.*, 4.

¹⁹ *Ibid.*, 2.

²⁰ Spot market radio advertising expenditures provided by Miller Kaplan Associates.

²¹ *Ibid.*

²² Competitive Media Reporting, 2000-2002.

The percentage of youth, ages 12-20, in the total population age 12 and over, varies considerably by radio market across the United States, from 8% to 23%. For all markets surveyed by Arbitron, the weighted average is 15.1%. This is consistent with U.S. Census data that show that youth represent 15.6% of the general population age 12 and over. If a radio ad is placed on a station for which the percentage of youth listening is greater than the percentage of youth in the general population, youth are more likely to hear that ad than adults. In a particular market, this threshold for youth overexposure to alcohol advertising could therefore be as low as 8% or as high as 23%. For the nation on average, this threshold is 15.1%.

II. Youth Routinely Overexposed

Underage youth, ages 12-20, heard 8% more beer and ale advertising and 12% more low-alcohol refresher advertising than adults 21 and over in the sample of radio ads aired in the 19 markets in 2001 and 2002. The overexposure was even greater for the distilled spirits category, where youth heard 14% more advertising. On the other hand, the wine industry directed its radio advertising to the adult audience, and youth heard 75% less of its advertising in the 2001-2002 sample.

Table 2: Youth Exposure to Alcohol Radio Advertising

Beverage Category*	# Ads	12-20 GRPs	21+ GRPs	12-20 : 21+ Ratio
Beer and Ale	51,190	2,689	2,481	1.08
Distilled Spirits	9,740	560	489	1.14
Low-Alcohol Refreshers	6,091	309	277	1.12
Wine	4,673	77	314	0.25

Source: Media Monitors, Arbitron Ratings

*includes only commercials† within these product categories for which the brand was identified by MMI; excludes commercials for hard cider.

†Of the alcoholic beverage commercial occurrences tracked by MMI, 15,124 did not specify the individual brand that was being advertised, but instead only specified the parent company. These occurrences were therefore excluded from brand- and category-level analyses. 1040 ads reported by MMI as Anheuser-Busch Products (i.e. not specific to one brand) were assigned to the Beer & Ale category for purposes of category analysis. We tested the distributions of the mean GRPs for ages 12-20, 21-34, 21+ and 35+ for this group of 15,124 commercials, relative to the balance of commercials, to ensure we did not introduce any bias by excluding these ads from brand- and category-level analyses. For each age group tested (12-20, 21+, 21-34, 35+) the mean value of the distribution was the same for both the excluded and the included samples at a 95% confidence level.

Of the entire sample of 87,094 ads, 39%—33,867—aired on a station for which the percentage of the youth in the listening audience was greater than the percentage of youth in the general population of a particular market. In fact, 14%—or 12,355 ads—were played where the youth listening audience was twice as great as the general youth audience in a particular market. The alcohol industry has its own standard of not placing ads where the underage audience is more than 50%,²³ but even this lax standard was not always met in the sample: 960 ads were placed on programming where the underage audience was greater than 50%. (A summary of radio ads that overexposed youth in 2001-2002, whether defined by the percentage of youth in the audience, or by the percentage of youth in the audience relative to the percentage of youth in the local market population, is provided in Appendix B.)

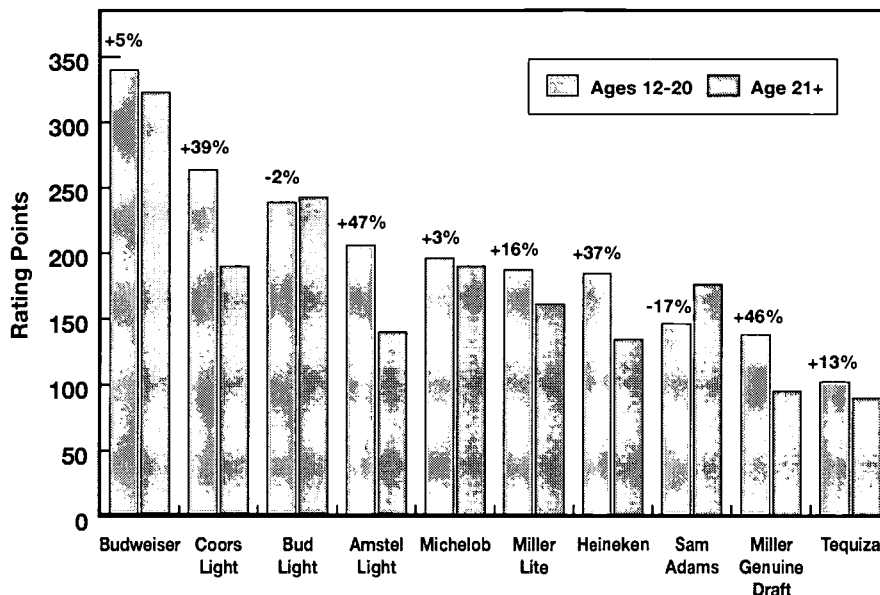
In terms of ads by brands, 63 of the 160 brands overexposed youth to their radio advertising, and 20 of the 160 brands delivered more radio advertising to the youth audience than to young adults ages 21-34. (Tables of youth and adult GRPs by advertised brand for the total population, the Hispanic population and the African-American population are provided in Appendix C.) Among the 20 brands that actually delivered more radio advertising to youth than to young adults were Remy Martin Cognac, Bacardi Rum, Courvoisier Cognac, Colt 45 Malt Liquor, and Hennessy Cognac. The impact of hip-hop artists and their songs on the marketing of cognacs and other alcoholic beverages has received considerable media attention. A spokesman for Allied Domecq Wine and Spirits told *The New York Times* in September 2002 that “Pass the Courvoisier Part Two” by Busta Rhymes increased sales of that liquor by 4.5% in the first quarter of 2002 and “into double digits in recent months.”²⁴

An analysis of the top 10 beer and ale brands in terms of radio advertising delivered to the youth audience shows that eight overexposed youth relative to adults. The overexposure ranged from 47% more advertising delivered to youth than to adults by Amstel Light to 3% more advertising delivered to youth than to adults by Michelob.

²³ Beer Institute, “Advertising & Marketing Guide Code,” <<http://www.beerstitute.org/admarkcode.htm>> (19 Nov 2002); Distilled Spirits Council of the United States, “Code of Good Practice for Distilled Spirits Advertising and Marketing,” <<http://discus.org/industry/code/code.htm>> (19 Nov 2002, 1998).

²⁴ Lynette Holloway, “Hip-Hip Sales Pop: Pass the Courvoisier and Count the Cash,” *New York Times*, Monday, 2 September 2002, sec. C1.

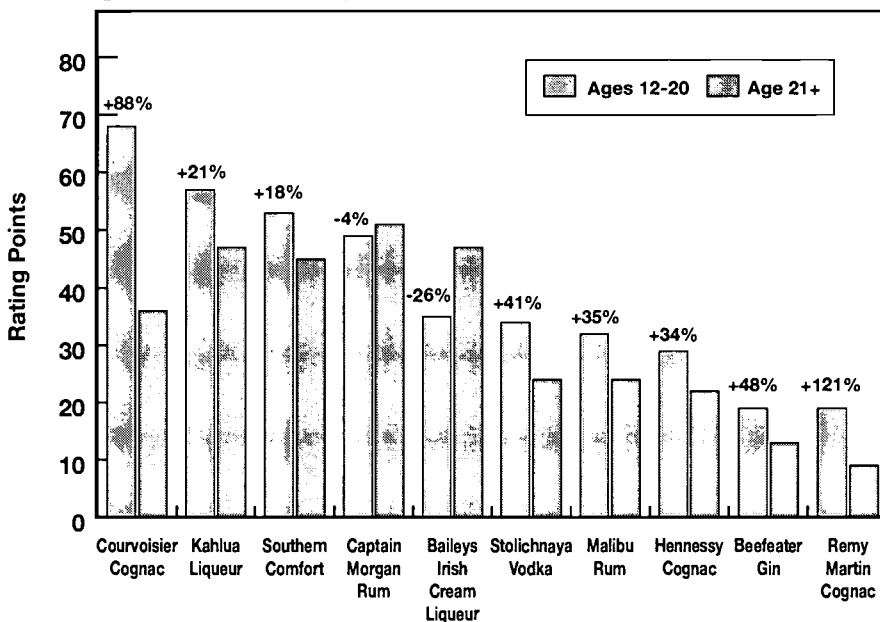
Figure A: Beer Brands with Most Youth Advertising



Source: Media Monitors, Arbitron Ratings

For distilled spirits, the analysis is similar. Of the top 10 brands in terms of radio advertising delivered to youth in 2001-2002, eight overexposed youth relative to adults. Overexposure among the distilled spirits brands ranged from Remy Martin Cognac's 121% to Southern Comfort's 18%.

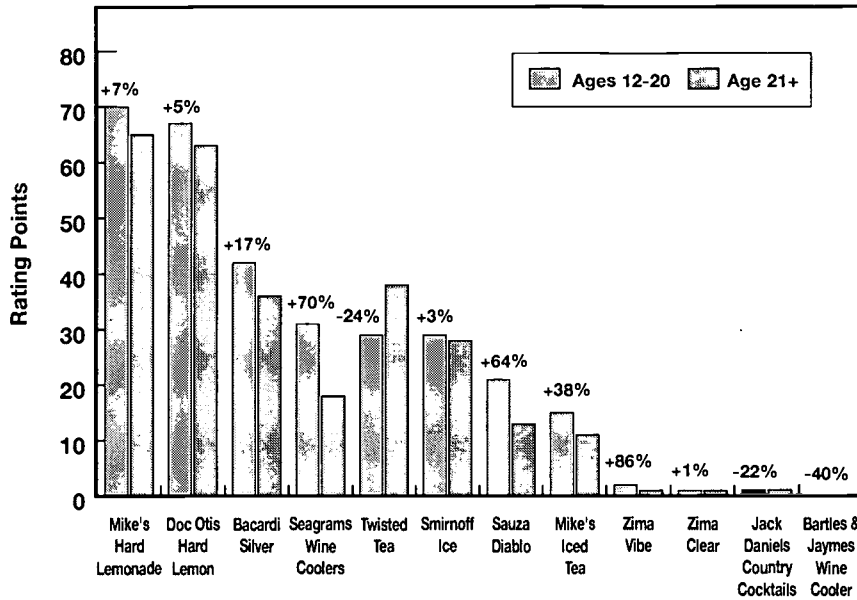
Figure B: Distilled Spirits Brands with Most Youth Advertising



Source: Media Monitors, Arbitron Ratings

The industry category of low-alcohol refreshers includes the alcoholic beverages that are popularly known as “malternatives” or “alcopops,” and, as the spending analysis indicates, they have had significant increases in advertising between 2000 and 2002. This ad spending was only on 12 brands, and four of the brands had little radio advertising at all. Of the 12, however, nine of them overexposed youth to their radio ads. The overexposure ranged from 86% for Zima Vibe to 1% for Zima Clear.

Figure C: Low-Alcohol Refresher Brands with Most Youth Advertising



Source: Media Monitors, Arbitron Ratings

A final analysis demonstrates how the alcohol industry's overexposure of youth to its radio advertising stretches from coast to coast. In nine of the 19 markets in the 2001-2002 sample, youth were overexposed. This overexposure ranged from 45% more alcohol radio advertising delivered to youth in Miami-Ft. Lauderdale to 5% more in Honolulu. Even when youth were not overexposed to the radio advertising, the volume of alcohol radio advertising delivered to youth compared to adults was significant. For instance, in San Antonio, New York, Boston, Indianapolis, Denver-Boulder, Detroit and Chicago youth heard on average more than four radio alcohol ads for every five heard by adults.

Table 3: Alcohol Radio Advertising by Market 2001-2002

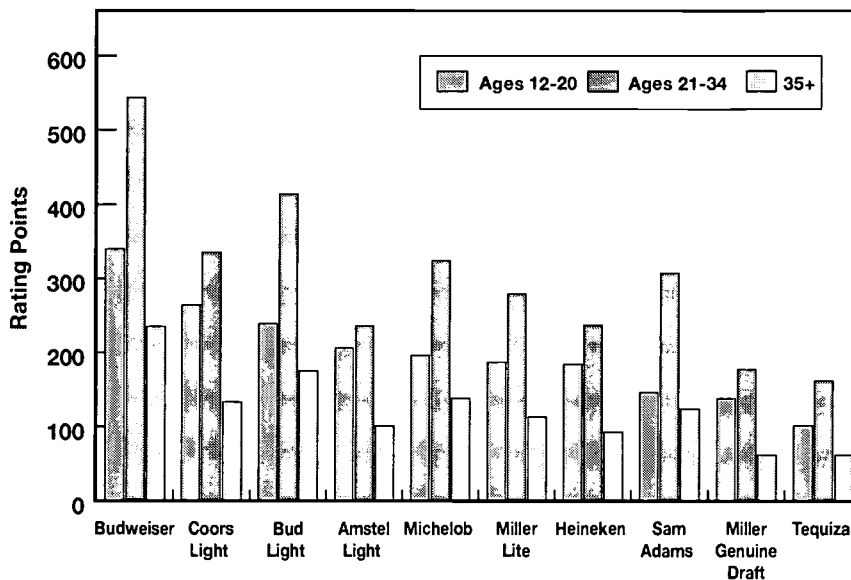
Market	12-20 GRPs	21+ GRPs	12-20 : 21+ Ratio
Miami-Ft. Lauderdale	3,216	2,211	1.45
Washington, DC	2,681	2,090	1.28
Dallas-Ft. Worth	4,412	3,669	1.20
San Francisco	4,044	3,406	1.19
Los Angeles	6,164	5,609	1.10
Atlanta	3,550	3,318	1.07
Seattle-Tacoma	3,148	2,954	1.07
Houston-Galveston	2,676	2,529	1.06
Honolulu	3,053	2,919	1.05
San Antonio	3,300	3,392	0.97
New York	6,444	6,800	0.95
Boston	3,414	3,607	0.95
Indianapolis	3,823	4,074	0.94
Denver-Boulder	2,548	2,992	0.85
Detroit	2,194	2,642	0.83
Chicago	4,636	5,665	0.82
Nashville	967	1,338	0.72
Philadelphia	1,886	3,048	0.62
Cincinnati	1,502	2,441	0.62

Source: Media Monitors, Arbitron Ratings

These Aren't Your Mom and Dad's Radio Ads

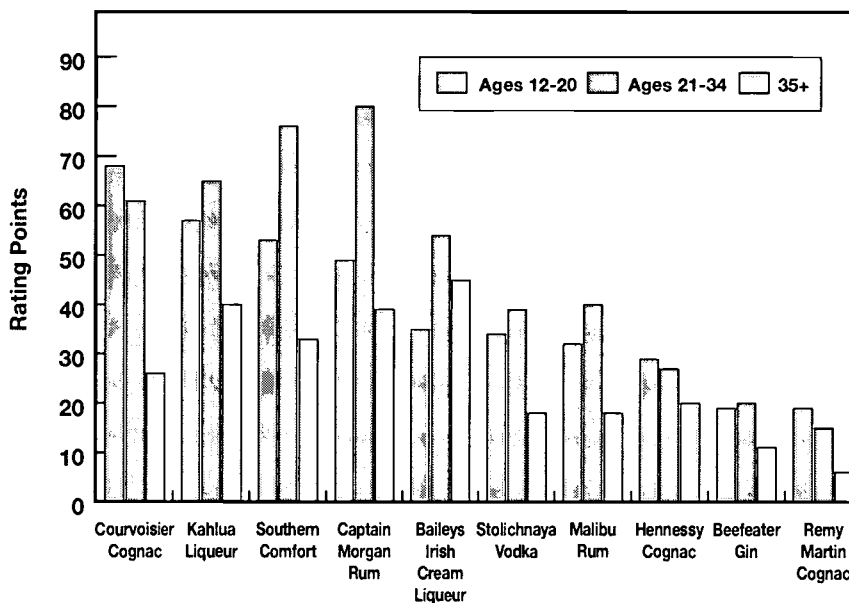
If it is a truism that parents don't listen to the same music as their children, it is likewise true that the alcohol industry isn't placing its radio ads where parents will hear them. The alcohol industry often defends its advertising practices by pointing to the 21-34 age group as its target audience.²⁵ In fact, looking at the top 10 brands in the different alcohol categories—beer and ale, distilled spirits, and low-alcohol refreshers—in terms of radio advertising delivered to the youth market does show that 21- to 34-year-olds are routinely exposed to more alcohol advertising than youth. At the same time, youth are routinely overexposed, when compared to adults age 35 and over, by an even greater percentage. In other words, the alcohol advertising on radio routinely spills over to the underage audience more than to the older adult audience of legal age.

Figure D: Beer Brands with Most Youth Advertising



Source: Media Monitors, Arbitron Ratings

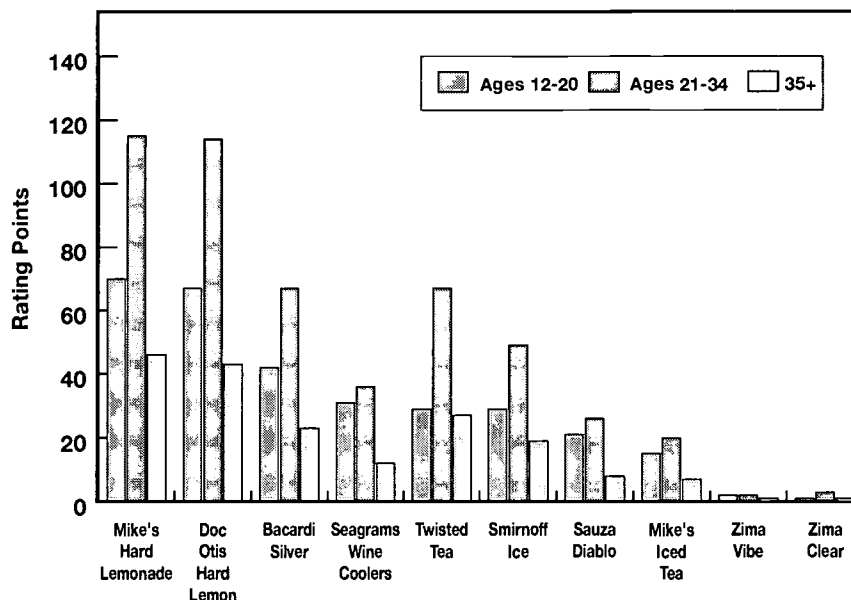
Figure E: Distilled Spirits Brands with Most Youth Advertising



Source: Media Monitors, Arbitron Ratings

²⁵ See footnote 9.

Figure F: Low-Alcohol Refresher Brands with Most Youth Advertising



Source: Media Monitors, Arbitron Ratings

Alcohol Radio Ads Where and When Youth Listen

Four radio formats routinely have a 50% or higher percentage of youth listeners²⁶ than the percentage of youth in the general population: Rhythmic Contemporary Hit, Pop Contemporary Hit, Urban Contemporary and Alternative.²⁷ For instance, youth on average make up 27% of the listening audience for Rhythmic Contemporary Hit formats; this percentage is almost double that of youth in the general listening audience. This means that on Rhythmic Contemporary Hit formats, the youth audience is highly concentrated, and ads placed on that format are more likely to be heard by youth than by adults.

After reviewing the placement of alcohol ads on radio by format, the Center's analysis finds that in the 2001-2002 sample 73% of the advertising in terms of GRPs directed to youth was on these four formats. In comparison, 53% of the advertising directed to young adults 21-34 was placed on these four formats. Again, this shows a selection of formats by the alcohol industry that results in its radio advertising spilling down to the underage audience, and in this instance also shows a substantially more effective delivery of the advertising to the underage audience.

²⁶ Media Monitors, Arbitron Ratings.

²⁷ *Rhythmic Contemporary Hit* (CHR-rhythmic) stations play hip-hop, rap and dance songs, rather than rock and alternative (played on Popular Contemporary Hit or CHR-pop), although there is some cross-over. Playlists consist of new cutting-edge music, current hits and popular hits of the last 6 to 12 months. The target audience is people 15 to 30 years of age, and artists played on these stations include 50 Cent, Ja Rule, Jennifer Lopez, LL Cool J, Aaliyah, Nelly, and Tupac. *Pop Contemporary Hit* is also referred to as Contemporary Hit (CHR-top 40). The basic elements of this format are the same as Rhythmic Contemporary Hit (above), but Pop Contemporary Hits favors rock and alternative songs. Artists include Jennifer Lopez, Justin Timberlake, B2K, P. Diddy, and Eminem. *Urban Contemporary* is usually listed simply as "urban" and is also known as R&B (rhythm and blues). The Urban Contemporary musical genre reflects a large number of African-American music recording artists with such music as rap, hip-hop, house, soul and new artists. Urban formats are generally aimed at younger audiences. Artists include 50 Cent, Aaliyah, Jennifer Lopez, Ja Rule, Dru Hill, Nelly, and Snoop Dogg. *Alternative* stations are generally non-commercial, college-run outlets that play cutting-edge music not typically found on other stations; they may include some punk, industrial, and heavy metal music in the mix. Artists include Queens of the Stone Age, Red Hot Chili Peppers, Saliva, Audioslave, and Foo Fighters. See e.g., 10,000 Watts U.S. Radio and TV Directory, "Frequently Asked Questions," <<http://www.10000watts.com/FAQ.html>>, (20 Feb 2003); TVRadioWorld, "Radio Formats," <http://www.tvradioworld.com/directory/Radio_Formats/>, (20 Feb 2003); Radio and Records, "Formats," <<http://www.radioandrecords.com/>>, (20 Feb 2003).

Table 4: Alcohol Advertising Exposure on Youth Radio Formats

Format	Youth Ages 12-20 % Composition	2001-2002 GRPs			12-20 : 21+ Ratio
		12-20 GRPs	21-34 GRPs	21+ GRPs	
Alternative	21.6%	1,321	1,816	831	1.59
Urban Contemporary	24.4%	688	686	369	1.87
Pop Contemporary Hit Radio	30.5%	559	438	221	2.53
Rhythmic Contemporary Hit	27.0%	514	517	242	2.13
All Formats		4,223	6,515	4,278	0.99
Youth Formats as % of total GRPs		73%	53%	39%	

Source: Media Monitors, Arbitron Ratings

MMI provides information on four dayparts during the week: 6 a.m. to 10 a.m. Monday through Friday; 10 a.m. to 3 p.m. Monday through Friday; 3 p.m. to 7 p.m. Monday through Friday; and 7 p.m. to midnight Monday through Friday.²⁸ On average for 2001 and 2002, alcohol advertising on two of the four dayparts tracked by MMI overexposed youth. The dayparts when youth were not overexposed were the weekday morning drive time of 6 a.m. to 10 a.m., a time that typically delivers advertising exposure to the working and commuting audiences, and weekday daytime from 10 a.m. to 3 p.m. However, alcohol advertising during the summer months did overexpose youth during the 10 a.m. to 3 p.m. daypart, Monday through Friday. Youth listening levels during the summer ratings periods are elevated relative to other seasons.²⁹

Table 5: Alcohol Advertising Exposure by Daypart

Daypart	2001-2002 Total					Summer 2001/Summer 2002				
	Youth 12-20		Adult 21+		12-20 : 21+ Ratio	Youth 12-20		Adult 21+		12-20 : 21+ Ratio
	GRPs *	%	GRPs *	%		GRPs *	%	GRPs *	%	
M-F 6:00AM - 10:00AM	1,263	21%	1,436	23%	0.88	387	19%	424	22%	0.91
M-F 10:00AM - 3:00PM	1,607	27%	2,169	35%	0.74	719	36%	698	37%	1.03
M-F 3:00PM - 7:00PM	1,863	31%	1,843	30%	1.01	551	28%	541	29%	1.02
M-F 7:00PM - 12:00M **	1,283	21%	791	13%	1.62	344	17%	231	12%	1.49
Market Subtotal	6,016		6,238		0.96	2,002		1,893		1.06

* market subset - includes only markets monitored 6 a.m. to 11 p.m. M-F

** standard daypart is 7 p.m. to 12 midnight; Media Monitors measures until 11 p.m.

Source: Media Monitors, Arbitron Ratings

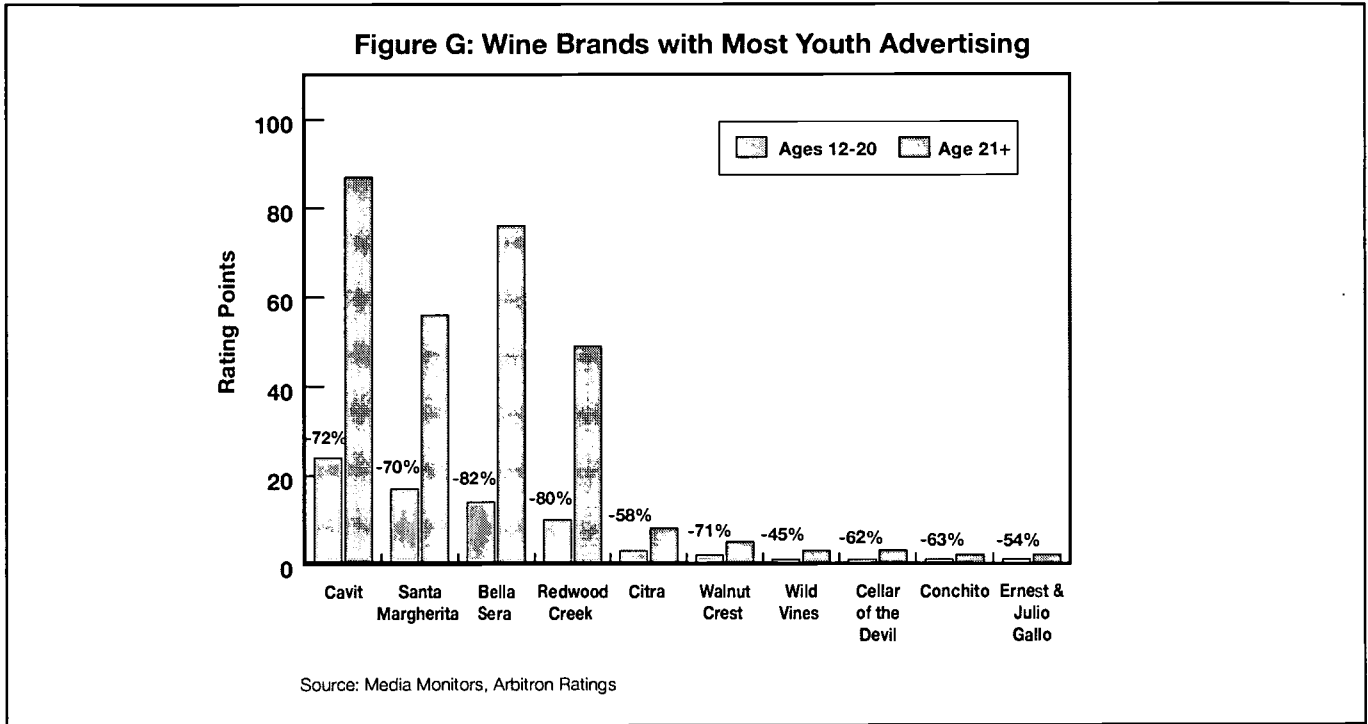
To establish a context for daypart findings based on the limited hours during which MMI samples its markets, a daypart comparison between MMI for 2001-2002 and the separate BVS case study for December 2002-January 2003 was performed. This analysis, shown as Appendix D, suggests that a considerable amount of alcohol advertising occurs on weekdays after 7:00 p.m. that is not reported in the 16 MMI markets that are only monitored until 7:00 p.m. In the analysis, 24% of weekday youth ages 12-20 rating points in the BVS case study occurred between 7 p.m. and midnight, while 21% of youth ages 12-20 rating points in the three MMI markets occurred between 7 p.m. and 11 p.m. The BVS data therefore confirms the conclusions based on the three-market sample from MMI in which weekday evening ad occurrences are reported.

²⁸ MMI provides monitoring from 6 a.m. to 7 p.m. in 16 markets representing 52% of youth GRPs in this report, and from 6 a.m. to 11 p.m. in three markets representing 48% of youth GRPs.

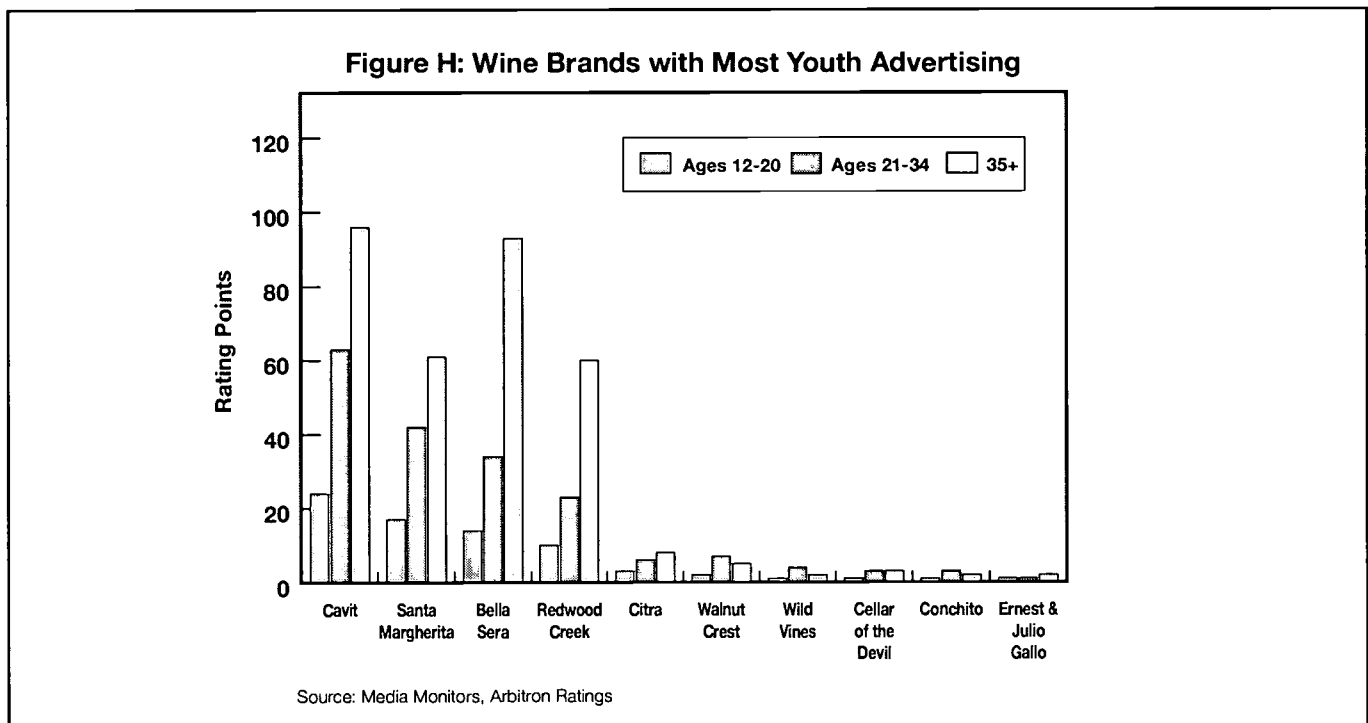
²⁹ Arbitron.

Wine Sings a Different Tune

The analysis of radio advertising for wine presents a striking contrast to advertising for beer and ale, low-alcohol refreshers and distilled spirits. Of the 10 wine brands with the most advertising that does reach the youth audience, all 10 direct substantially more advertising to adults. Youth hear 82% less advertising for Bella Sera wine than adults, for instance.



When radio advertising for wine is analyzed using the 12-20, 21-34, and 35+ demographic split, the analysis is even more striking, with the 35+ audience being substantially exposed to more radio advertising for wine than the 12-20 age group—the exact opposite finding from that for radio advertising for beer and ale, low-alcohol refreshers and distilled spirits.



III. Youth Overexposure: A Case Study

To cross-check and validate the findings from the 2001-2002 sample, a case study was conducted from December 15, 2002 to January 31, 2003, using VMS and BVS. (See Appendix A for further description of these services.) These services provide for a more comprehensive tracking of ad placements, including the monitoring of weekend dayparts. This analysis is based on monitoring the placement of ads for five brands in 63 markets and captured 11,712 radio ads over the six-week period.

The findings were consistent with the 2001-2002 sample:

- All five brands overexposed youth to their advertising, ranging from youth hearing 387% more advertising than adults for Bacardi to youth hearing 24% more advertising than adults for Coors Light.
- Sixty-one percent of the ads were more likely to be heard by youth than by adults.
- “Youth” formats received most of the radio alcohol advertising directed to youth.³⁰
- In every daypart, except for 10 a.m. to 3 p.m. Monday through Friday, youth were overexposed to radio alcohol advertising.

To increase the odds of capturing a large number of occurrences, brands were selected on the basis of new radio creative airing as monitored by VMS. All occurrences of those ads in 63 markets monitored by BVS were then tracked and matched with audience data from Arbitron. Details of the brand selection and monitoring methodology are included in Appendix E. The five brands are:

- Bacardi, 200 ads
- Coors Light, 6,646 ads
- Heineken, 1,146 ads
- Jack Daniels Original Hard Cola, 72 ads
- Southern Comfort, 3,648 ads

Not only did each of the five brands overexpose youth to their advertising, but one brand—Bacardi—also exposed youth to more advertising than the 21-34 age group, by 99%.

Table 6: BVS Sample: Youth (12-20) vs. Adult (21+) Exposure

Brand	12-20 GRPs	21+ GRPs	12-20 : 21+ Ratio
Bacardi	9.2	1.9	4.87
Jack Daniels Original Hard Cola	0.2	0.1	2.84
Heineken	29.9	16.4	1.82
Southern Comfort	48.3	31.1	1.55
Coors Light	104.8	84.5	1.24

Note: GRPs are rounded and were calculated based on the universe of 63 markets
Source: BVS, Arbitron Ratings

Table 7: BVS Sample: Youth (12-20) vs. Young Adult (21-34) Exposure

Brand	12-20 GRPs	21-34 GRPs	12-20 : 21-34 Ratio
Bacardi	9.2	4.6	1.99
Jack Daniels Original Hard Cola	0.2	0.2	0.93
Heineken	29.9	32.3	0.93
Southern Comfort	48.3	54.5	0.89
Coors Light	104.8	160.4	0.65

Note: GRPs are rounded and were calculated based on the universe of 63 markets
Source: BVS, Arbitron Ratings

³⁰ Youth formats are identified as those with an audience composition for youth ages 12-20 that is at least 50% greater than the percentage of youth in the population, based on Arbitron ratings.

As in the 2001-2002 sample, the radio alcohol advertising monitored from December 2002 through January 2003 was routinely placed on the four formats where youth listenership is the greatest: Rhythmic Contemporary Hit, Pop Contemporary Hit, Urban Contemporary and Alternative. Almost 70% of the radio alcohol advertising directed to youth by these five brands was placed on these formats, and the youth overexposure ranged from 197% on Urban Contemporary to 74% on the Alternative format.

Table 8: BVS Sample: Alcohol Advertising Exposure on Youth Radio Formats

Format	Youth Ages 12-20 % Composition	12-20 GRPs	21-34 GRPs	21+ GRPs	12-20 : 21+ Ratio
Urban Contemporary	34.8%	11	8	4	2.97
Rhythmic Contemporary Hit	29.0%	47	47	21	2.28
Pop Contemporary Hit Radi	28.8%	21	18	9	2.26
Alternative	23.7%	56	77	32	1.74
All Formats		192	252	134	1.58
Youth Formats as % of total GRPs		70%	59%	49%	

Source: BVS, Arbitron Ratings

Youth overexposure by daypart in the ads audited from December 2002 through January 2003 ranged from 137% during the 7 p.m. to midnight Monday through Friday time slot to 49% for the 6 a.m. to 10 a.m. Monday through Friday time slot.

Table 9: BVS Sample: Alcohol Advertising Exposure by Daypart

Daypart	Youth ages 12-20 % Composition	12-20 GRPs	21+ GRPs	12-20 : 21+ Ratio
M-F 6:00AM - 10:00AM	18.4%	24	16	1.49
M-F 10:00AM - 3:00PM	12.5%	38	43	0.88
M-F 3:00PM - 7:00PM	21.3%	54	36	1.50
M-F 7:00PM - 12:00M	29.0%	37	16	2.37
S-S 6:00AM - 12:00M	23.7%	40	23	1.69

Source: BVS, Arbitron Ratings

IV. African-American and Hispanic Communities

The 2001-2002 sample of 87,094 alcohol radio ads monitored by MMI was also analyzed to determine what, if any, overexposure of youth relative to adults occurred in the African-American and Hispanic communities. There has been widespread concern in both communities that the alcohol industry uses specific marketing tactics to encourage alcohol consumption in their communities, from the commercialization of Cinco de Mayo to the use of Juneteenth and Black History Month as alcohol marketing opportunities.

Arbitron Ratings provides estimates of the African-American and Hispanic radio audiences in a subset of its measured radio markets. To account for potential instability of the Arbitron audience data, a one-year average was used for both the African-American and the Hispanic audiences. (See Appendix A for a further discussion of this methodology.) In the case of the African-American community, 83,939 of the 87,094 ads had an African-American reported audience in the 2001-2002 sample; in the case of the Hispanic community, 69,368 of the 87,094 ads had a reported Hispanic audience.

The findings for the African-American and Hispanic communities tracked many of the general findings of youth overexposure for the 2001-2002 sample. For instance, Hispanic youth heard 34% more beer and ale advertising than Hispanic adults, and as much beer and ale advertising was delivered to African-American youth as to African-American adults. For radio advertising for distilled spirits, Hispanic youth were overexposed by 40%, while African-American youth heard four distilled spirits ads for every five that reached African-American adults.

For low-alcohol refreshers, both Hispanic and African-American youth were overexposed—by 24% and 10%, respectively.

Again, radio advertising for wine was substantially more effectively delivered to the adult audiences: Hispanic youth heard 64% less wine advertising than Hispanic adults, and African-American youth heard 77% less wine advertising than African-American adults.

Table 10: Hispanic Youth vs. Hispanic Adult Radio Exposure

Beverage Category	GRPs Ages 12-20	GRPs Age 21+	12-20 : 21+ Ratio
Beer and Ale	2,659	1,989	1.34
Distilled Spirits	609	435	1.40
Low-Alcohol Refreshers	329	265	1.24
Wine	70	198	0.36

Source: Media Monitors, Arbitron Ratings

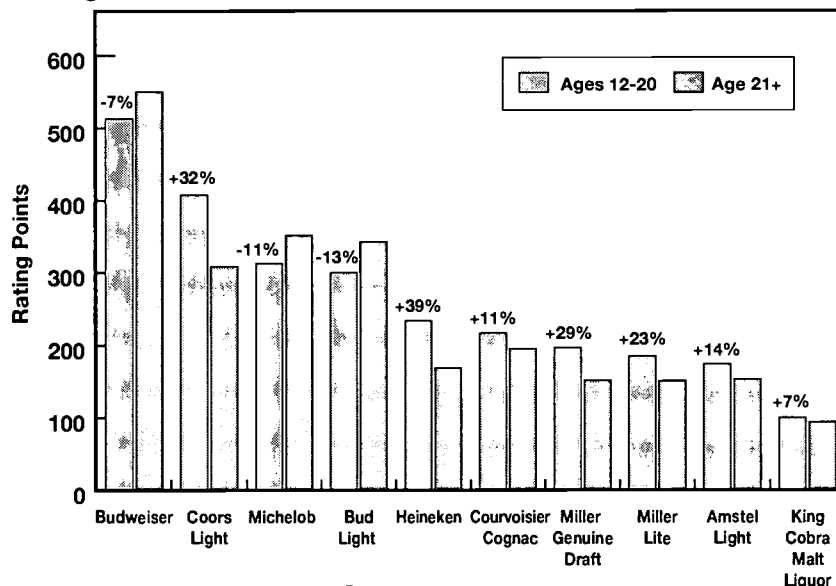
Table 11: African-American Youth vs. African-American Adult Radio Exposure

Beverage Category	GRPs Ages 12-20	GRPs Age 21+	12-20 : 21+ Ratio
Beer and Ale	2,983	2,972	1.00
Distilled Spirits	859	1,075	0.80
Low-Alcohol Refreshers	201	182	1.10
Wine	68	293	0.23

Source: Media Monitors, Arbitron Ratings

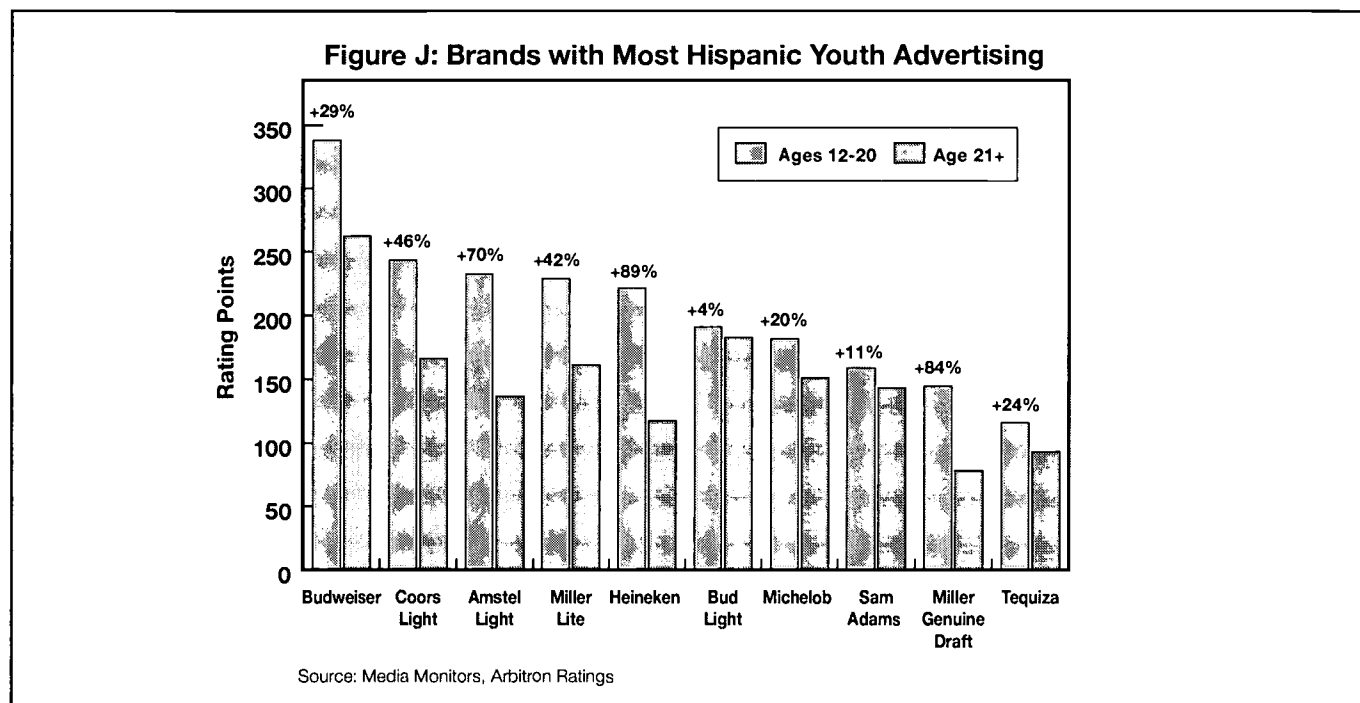
For the African-American community, 44 of the 160 brands overexposed African-American youth to their advertising compared to African-American adults. Seven of the 10 brands with the most advertising delivered to the African-American youth audience overexposed African-American youth. The overexposure ranged from 39% for Heineken to 7% for King Cobra Malt Liquor.

Figure I: Brands with Most African-American Youth Advertising



Source: Media Monitors, Arbitron Ratings

For the Hispanic community, 70 of the 160 brands overexposed Hispanic youth to their advertising compared to Hispanic adults. All 10 of the brands with the most advertising delivered to the Hispanic youth overexposed them. The overexposure ranged from 89% for Heineken to 4% for Bud Light.



Conclusion

Advertising in the measured media of magazines, television and radio is not done in isolation. Magazine, television and radio advertising are used to reinforce and complement the impact of one another.

In previous reports, the Center has documented the pervasive and systematic overexposure of youth to alcohol advertising in magazines in 2001³¹ and the laxity of the alcohol industry's guidelines in limiting youth exposure to alcohol advertising on television in 2001.³² The Center's analysis of radio advertising in 2001-2002 again demonstrates a pervasive and systematic overexposure of youth to alcohol advertising in a medium that, like magazines, allows for the selection of particular audiences because of station formats and daypart listening habits.

What emerges from the three reports is a panorama of a media environment that saturates youth with alcohol advertising.

The industry's guidelines allow advertising where the underage audience is not in the majority, and thus provide no protection to youth from the overexposure to alcohol advertising as documented in the Center's reports.

Oversight at the federal level is non-existent. The Federal Trade Commission released its review of alcohol advertising practices in 1999 and made several recommendations, but has done little publicly to follow up. The industry's public threshold for ad placement remains at 50%, although some companies say they try not to place ads where the underage audience is more than 30%—a threshold that still allows for youth overexposure. Public health advocacy groups such as Mothers Against Drunk Driving and the American Medical Association have advocated, respectively, for 10% and 15% thresholds for placing alcohol ads. The FTC also called on the industry to provide for independent third-party monitoring of its advertising practices, and that has been resisted by

³¹ Center on Alcohol Marketing and Youth, *Overexposed: Youth a Target of Alcohol Advertising in Magazines*, (Washington, DC: Center on Alcohol Marketing and Youth, 2002). Available at <<http://camy.org/research/files/overexposed0902.pdf>>.

³² Center on Alcohol Marketing and Youth, *Television: Alcohol's Vast Adland*, (Washington, D.C.: Center on Alcohol Marketing and Youth, 2002). Available at <<http://camy.org/research/files/television1202.pdf>>.

the industry. One company, Coors, has entered into a monitoring arrangement with the Better Business Bureau because it could not convince other beer companies to join it in establishing a third-party monitoring system.³³ The Department of Health and Human Services lacks critical public health data about underage drinking, such as the patterns of consumption for various ages by types and brands of alcohol. The advertising exposure data being collected and analyzed by the Center is basic public health surveillance that has been lacking.

While communities across the land and the nation as a whole have worked hard to ensure responsibility and accountability in limiting underage youth access to alcohol, it appears that no one is at home when it comes to responsibility and accountability in limiting the appeal of alcohol to underage youth.

³³ Bart Alexander, Director of Public Affairs, Coors Brewing Company, personal communication with Anna Haas, August 2, 2002.

Appendix A

A. Sources

Arbitron

Arbitron Ratings provides audience estimates on almost every radio station in approximately 300 radio markets across the U.S. Arbitron reports both “average quarter hour” and “cumulative” ratings; cumulative ratings, which represent the net number of listeners tuning to a particular station, may be calculated for a standard period of time, such as a daypart or week, or for a custom period of time such as one hour. For this analysis, VMR used average quarter-hour ratings for standard dayparts in order to best provide the audience ratings associated with particular commercials.

Arbitron reports Hispanic and African-American audiences in a subset of its total market list.

Media Monitors

Media Monitors provides radio advertising occurrence monitoring in 19 local radio markets for its English-language monitoring service, using a sampling process in which one random weekday per week is monitored on a selected list of stations in each market. All advertising is reported and assigned to a particular advertiser or brand, but it is not associated with a specific radio commercial. Advertising is not reported at the exact time, but instead for the hour in which it occurs; this hour is then mapped to standard weekday dayparts. Media Monitors surveys on weekdays between 6 a.m. and 7 p.m. in 16 markets representing approximately half of total teen alcohol advertising exposure, and from 6 a.m. to 11 p.m. in the remaining three markets.

Video Monitoring Services

Video Monitoring Services (VMS) monitors various media, including radio, for advertising and programming. Two hundred and nine radio stations in 25 markets are tracked; markets are tracked between 24 hours and 100 hours per week. Radio advertising for alcohol is provided on a “first occurrence” basis, with specific details as to the market, station, time, advertiser, brand, description and a copy of the actual creative.

Broadcast Verification Service

Broadcast Verification Service (BVS) monitors encoded advertising on TV and radio. More than 900 stations in 103 markets are continuously tracked for occurrences. Alcohol advertising provided by VMS is encoded by BVS; occurrences are captured and reported with specific market, station, time, and advertising information.

Miller Kaplan Associates

Miller Kaplan Associates (MKA) reports radio advertising expenditures in 32 markets. Virtually all commercial stations in each market participate and provide actual expenditure data under restrictions that prohibit release of any information specific to a particular station. The expenditure information is generally provided at the company level, rather than the individual brand. MKA therefore provides company- and market-level radio advertising reports in 32 markets that are the most accurate measure of alcohol category radio advertising, without providing detailed brand- or station-level data.

B. Process

Daypart coding

Using the complete database of all alcohol radio advertising occurrence data for the years 2001 and 2002, VMR coded each occurrence to its corresponding daypart:

Media Monitors (2001-2002)

<u>Hours</u>	<u>Daypart</u>	<u>Total Occurrences</u>
M-F 6 a.m. to 10 a.m.	Weekday Morning Drive	15,452
M-F 10 a.m. to 3 p.m.	Weekday Mid-Day	30,710
M-F 3 p.m. to 7 p.m.	Weekday Afternoon Drive	32,590
M-F 7 p.m. to 11 p.m.	Weekday Evening	8,342

Broadcast Verification Service (December 15, 2002-January 31, 2003)

<u>Hours</u>	<u>Daypart</u>	<u>Total Occurrences</u>
M-F 6 a.m. to 10 a.m.	Weekday Morning Drive	700
M-F 10 a.m. to 3 p.m.	Weekday Mid-Day	2,378
M-F 3 p.m. to 7 p.m.	Weekday Afternoon Drive	2,619
M-F 7 p.m to midnight	Weekday Evening	2,998
S/S 6 a.m. to midnight	Weekend	3,017

Ratings append and audience calculation

For each daypart, market and station, VMR applied the average quarter-hour audience as reported by Arbitron for the corresponding survey period. VMR calculated:

- audience composition for youth ages 12-20 as a percentage of all persons age 12+
- index of youth ages 12-20 audience composition relative to each market
- audience composition of Hispanic youth ages 12-20 as a percentage of all persons age 12+ and of the total Hispanic population (in Arbitron markets where Hispanic audiences are reported)
- index of Hispanic youth ages 12-20 audience composition relative to each market (in Arbitron markets where Hispanic audiences are reported)
- audience composition of African-American youth ages 12-20 as a percentage of all persons age 12+ and of the total African-American population (in Arbitron markets where African-American audiences are reported)
- index of African-American youth ages 12-20 audience composition relative to each market (in Arbitron markets where African-American audiences are reported)
- GRPs (Gross Rating Points) for:
 - Ages 12-20 (total, Hispanic, African-American)
 - Ages 21-34 (total, Hispanic, African-American)
 - Age 35+ (total, Hispanic, African-American)
 - Age 12+ (total, Hispanic, African-American)
 - Age 21+ (total, Hispanic, African-American)

In addition, exposures were aggregated and audience composition and GRPs were calculated by advertiser, station, and format within markets and across all markets in which an advertiser has reported radio advertising.

GRPs

GRPs (Gross Rating Points) are the sum of ratings of a set of ad occurrences, including multiple exposures. GRPs are the most common measure of media weight. For example, 200 GRPs may represent the number of exposures required to reach 50% of a given population an average of four times, or 80% of the same population an average of 2.5 times.

GRPs are population- and market-specific, and must be calculated for each demographic audience and each market or group of markets. For the totals in this report based on MMI occurrences, GRPs were calculated for the 19 market total.

GRP Ratio

VMR calculated a GRP ratio to measure exposure of youth relative to adults. This ratio divides the youth 12-20 GRPs for an individual ad occurrence (or for an aggregate by brand, market, daypart or product category) by the equivalent adult 21+ GRPs. A ratio of greater than 1 indicates that youth were exposed out of proportion to adults. A ratio of 2 indicates that youth were exposed at double the rate of adults.

The GRP ratio (and all GRP calculations) is based on actual market compositions, for which the percentage of youth ages 12-20 will vary.

Ratings surveys

For this analysis the Center on Alcohol Marketing and Youth licensed Arbitron ratings data beginning with the Winter 2001 survey and continuing to current surveys.

Except for Hispanic and African-American ratings (as noted below), for advertising occurrences reported in Media Monitors,

VMR used the corresponding survey period in Arbitron for 2001 to provide a reporting of what was purchased and the audience that was reached. For Fall 2002 advertising occurrences in Media Monitors, VMR used the Fall 2001 survey period in Arbitron for 2001 based on the availability of Arbitron Ratings data.

In cases where a particular station was not reported (as in the case of a station call letter change, or the case of a market that is measured with fewer than four surveys per year), VMR searched subsequent surveys until a match was found. If no match was found, VMR searched preceding surveys until a match was found.

Hispanic and African-American Ratings

Because of reported sampling and reporting variations for Hispanic and African-American audiences, VMR calculated a one-year average for these audiences and their corresponding populations to provide stable estimates.³⁴

For all occurrences in 2001, VMR used an average of all surveys in 2001. For occurrences in 2002, VMR used the contemporaneous 2002 survey and the preceding surveys of up to one year. The list of markets measured by Arbitron for both Hispanic and African-American audiences is a subset of the total list of measured markets, and it varies by survey. Most averages are of either two surveys (Fall and Spring) or all four surveys.

³⁴ The Arbitron Radio Market Report Reference Guide, updated February 2002, demonstrates how multibook averages are a standard feature of Arbitron reports. Multibook averages are widely used throughout the advertising industry to provide more stable radio ratings estimates than may otherwise be reported. Every reporting system for Arbitron Ratings provides the capability for multibook averages. On February 3, 2003, *Mediaweek* cited Arbitron's planned changes to Hispanic reporting to address swings in their Hispanic audience estimates. Katy Bachman, "3 Years of Spanish Lessons," *Mediaweek*, 3 February, 2003.

Appendix B

Table 1: Radio Ads that Overexpose Youth

	2001-2002 Sample	
	Total Ads	% of Total
Total Alcohol Radio Ads	87,094	100%
Overexposure Defined by Index *		
Youth Audience Index >100	33,867	38.9%
Youth Audience Index >200	12,355	14.2%
Youth Audience Index >300	1,795	2.1%
Overexposure Defined by % Youth Composition		
>30% Ages 12-20 Composition	11,481	13.2%
>40% Ages 12-20 Composition	3,795	4.4%
>50% Ages 12-20 Composition	960	1.1%

* Index = Youth 12-20 composition relative to the composition of youth ages 12-20 in each market

Source: Media Monitors, Arbitron Ratings

Appendix C – Table 1

Youth (12-20) vs. Adult (21+) Overexposure by Brand

Brand	Total GRPs		12-20 : 21+ GRP Ratio	Brand	Total GRPs		12-20 : 21+ GRP Ratio
	12-20	21+			12-20	21+	
Otra Beer	3.9	0.6	7.03	Martell Cognac	12.2	14.5	0.84
Asahi Beer	14.7	3.3	4.42	Tuaca Liqueur	1.9	2.3	0.84
Lancers Wine	0.1	0.0	4.34	Sam Adams Beer	145.6	176.4	0.83
Bacardi	14.6	4.3	3.43	Lowenbrau Beer	0.5	0.6	0.82
Natural Light Beer	0.3	0.1	3.16	Bass Ale	57.2	70.1	0.82
Midori Liqueur	12.4	4.3	2.90	Becks Beer	47.6	59.4	0.80
Old Milwaukee Beer	0.2	0.1	2.89	Jack Daniels Country Cocktails	0.9	1.2	0.78
Tequila Rose Liqueur	0.7	0.3	2.88	Cordon Negro Brut	0.7	0.8	0.78
Beaulieu Vineyard Wines	0.0	0.0	2.42	Molson Beers	27.4	35.1	0.78
Schlitz Malt Liqueur	2.0	0.8	2.41	Twisted Tea Malt Beverage	29.1	38.3	0.76
Das Komet Vanilla Liqueur	0.5	0.2	2.27	Seagrams 7 Crown Whiskey	2.4	3.1	0.76
Remy Martin Cognac	19.4	8.8	2.21	Seagrams Gin	9.0	11.9	0.76
Grant Burge Wine	0.1	0.0	2.04	Killarneys Red Lager	40.8	54.3	0.75
Riunite Wine	0.1	0.1	1.98	Schnappes Liquors	0.5	0.7	0.75
Courvoisier Cognac	67.5	36.0	1.88	Baileys Irish Cream Liqueur	35.4	47.5	0.74
King Cobra Malt Liqueur	30.9	16.5	1.88	Romana Sambuca Liqueur	1.7	2.3	0.74
Zima Vibe Malt Beverage	1.9	1.0	1.86	Rutherford Hill Wine	0.3	0.4	0.74
Colt 45 Malt Liqueur	22.7	12.6	1.80	Labatt Beer	18.7	25.9	0.72
Seagrams Wine Coolers	31.4	18.5	1.70	Chivas Regal Scotch	17.3	24.3	0.71
Jagermeister Liqueur	1.4	0.8	1.64	Cerveza Mexicali	0.0	0.1	0.69
Sauza Diablo	21.4	13.0	1.64	Vermeer Dutch Chocolate Cream Liqueur	2.3	3.4	0.68
Rolling Rock Beer	38.4	24.1	1.60	Magners Cider	11.6	17.8	0.65
Red Bull Malt Liqueur	7.2	4.7	1.55	Moosehead Beer	3.2	5.1	0.61
Stolichnaya Citrona	11.1	7.4	1.50	Becks Light Beer	8.6	14.1	0.61
Beefeater Gin	19.5	13.2	1.48	Berghoff Beer	2.6	4.4	0.60
Amstel Light Beer	205.6	139.7	1.47	Bartles & Jaymes Wine Cooler	0.1	0.1	0.60
Miller Genuine Draft	138.5	94.6	1.46	Southern Twist Liqueur	0.3	0.4	0.60
J&B Scotch	15.2	10.6	1.43	Cointreau Liqueur	0.1	0.1	0.56
Stolichnaya Vodka	33.9	24.0	1.41	Freixenet Wine	0.0	0.1	0.55
Coors Light Beer	263.7	190.1	1.39	Michael's Wines	0.0	0.0	0.55
Cutty Sark Scotch	0.2	0.2	1.38	Wild Vines Wine	1.5	2.7	0.55
Mike's Iced Tea Malt Beverage	15.3	11.1	1.38	Crown Beer	10.9	21.6	0.50
Heineken Beer	184.2	134.2	1.37	Pucker Schnappes	5.8	11.6	0.50
Jose Cuervo Tequila	9.0	6.6	1.36	Martini & Rossi Wine	0.0	0.0	0.50
Malibu Rum	32.5	24.1	1.35	Barton Beers	0.7	1.5	0.46
Hennessy Cognac	28.9	21.5	1.34	Busch Beer	18.6	40.1	0.46
Olde English 800	17.1	12.8	1.33	Ernest & Julio Gallo Wine	0.7	1.5	0.46
Lone Star Beer	4.1	3.4	1.22	Arbor Mist Wine	0.6	1.3	0.45
Icehouse Ice Beer	16.5	13.6	1.22	Sam Adams Octoberfest Seasonal Brew	0.1	0.1	0.45
Kahlua Liqueur	56.5	46.8	1.21	Seagrams VO Canadian Whiskey	4.2	9.5	0.44
TGI Fridays Frozen Drinks	10.0	8.3	1.20	Absolut Vodka	5.9	13.5	0.43
Bud Ice Draft Beer	17.7	14.8	1.19	Alize Liqueur	0.4	1.0	0.42
Dos Equis Beer	27.7	23.3	1.19	Citra Wine	3.3	7.8	0.42
Sauza Tequila	11.6	9.8	1.18	Warsteiner Beer	0.1	0.3	0.39
Southern Comfort	53.0	45.0	1.18	Cellar of the Devil Wine	1.1	2.8	0.38
Kocani Beer	1.5	1.3	1.17	Sutter Home Wine	0.0	0.1	0.38
Bacardi Silver Malt Liqueur	42.0	35.9	1.17	Conchito Wines	0.8	2.1	0.37
Miller Lite	187.0	160.6	1.16	Santa Margherita Wine	16.9	55.5	0.30
Cafrays Irish Ale	7.8	6.8	1.15	Titos Handmade Vodka	0.1	0.3	0.30
Red Stripe Beer	7.9	6.9	1.15	Walnut Crest Wine	1.6	5.4	0.29
Sam Adams Light Beer	9.7	8.5	1.14	Cavit Wine	23.8	86.6	0.28
High Gravity Lager	0.1	0.1	1.13	Wild Turkey Bourbon Whiskey	0.1	0.3	0.26
Tequila Beer	101.9	90.5	1.13	Korbel Brandy	0.0	0.0	0.23
Hurricane Malt Liqueur	13.9	12.6	1.10	Monthaven Coastal Wine	0.1	0.4	0.22
Mike's Hard Lemonade Malt Beverage	70.2	65.4	1.07	Redwood Creek Wine	9.8	49.1	0.20
Budweiser Beer	340.2	322.9	1.05	Rubitsso Wine	0.2	0.9	0.20
Doc Otis Hard Lemon Malt Beverage	66.7	63.4	1.05	Redhook Ale	0.7	3.7	0.19
Pilsener Urquell Beer	0.8	0.8	1.04	Bella Sera Wine	13.6	76.2	0.18
Michelob Beer	196.3	190.3	1.03	Johnnie Walker Black Label Scotch	0.2	1.4	0.18
B&B Cognac	1.7	1.7	1.03	Old Style Beer	2.3	13.9	0.17
Smirnoff Ice Malt Beverage	28.9	28.0	1.03	Johnnie Walker Scotch Whiskey	0.4	2.2	0.17
Jack Daniels Whiskey	1.3	1.3	1.02	Woodbridge Wine	0.0	0.2	0.17
Zima Clear Malt Beverage	1.4	1.4	1.01	Red Tail Ale	0.0	0.3	0.16
Dewars 12 Scotch Whiskey	0.2	0.2	1.00	McPherson Wine	0.2	1.4	0.15
Korbel Champagne	0.4	0.4	1.00	Manischewitz Wine	0.0	0.1	0.13
Bud Light Beer	238.7	243.2	0.98	Mezza Corona Wines	0.0	0.2	0.12
Guinness Beer	37.8	38.6	0.98	Snowman Ale	0.0	0.0	0.12
Steinlager Beer	0.4	0.4	0.98	Early Times Bourbon Whiskey	0.1	1.1	0.11
Miller High Life	5.9	6.1	0.96	Bolla Wine	0.2	2.2	0.10
Captain Morgan Rum	48.8	50.9	0.96	Baron Herzog Wine	0.4	3.9	0.10
Coors Beer	21.9	23.0	0.95	Moet & Chandon Champagne	0.0	0.5	0.08
Guinness Stout	25.7	27.2	0.95	Keystone Beer	0.0	0.2	0.08
Tanqueray Gin	8.3	9.0	0.93	Grey Goose Vodka	0.1	1.0	0.07
Hard Core Hard Cider	2.3	2.5	0.92	Bouchard Wine	0.1	1.2	0.06
Killians Variety Beers	25.9	28.3	0.91	Rotari Italian Sparkling Wines	0.0	0.1	0.06
Harp Lager	19.5	21.4	0.91	Veuve Clicquot Champagne	0.4	8.5	0.05
Fosters Beer	28.4	31.4	0.91	Fotran Kasher Wine	0.0	0.9	0.04
Bacardi Breezers Rum Coolers	0.1	0.1	0.90	San Giuseppe Wines	0.0	0.0	0.04
Special Export Beer	18.2	20.4	0.89	Bunrati Meade	0.0	0.1	0.01
OP Vodka	1.4	1.6	0.89	No Product Specified	591.4	718.9	0.82
Pabst Blue Ribbon Beer	0.5	0.6	0.86				
Total	4,223.2	4,277.8	0.99				

Source: Media Monitors, Arbitron Ratings

Appendix C – Table 2

Hispanic Youth (12-20) vs. Hispanic Adult (21+) Overexposure by Brand

Brand	GRPs 12-20	GRPs 21+	12-20 : 21+ GRP Ratio	Brand	GRPs 12-20	GRPs 21+	12-20 : 21+ GRP Ratio
Otra Beer	12.1	1.9	6.41	Kocani Beer	0.1	0.1	0.88
Old Milwaukee Beer	0.1	0.0	5.14	Lowenbrau Beer	0.1	0.1	0.87
Bacardi	23.7	4.7	4.99	Chivas Regal Scotch	29.5	34.0	0.87
Asahi Beer	40.9	8.8	4.67	Michael's Wines	0.0	0.0	0.86
Natural Light Beer	0.7	0.2	4.18	Molson Beers	13.2	15.5	0.86
Schlitz Malt Liqueur	1.8	0.5	3.86	Schnappes Liquors	0.6	0.7	0.85
Remy Martin Cognac	21.3	5.6	3.81	Coors Beer	9.8	11.7	0.84
Lancers Wine	0.6	0.2	3.32	Caffrays Irish Ale	4.0	4.9	0.83
Midori Liqueur	25.2	7.7	3.28	Hard Core Hard Cider	1.0	1.2	0.83
Tequila Rose Liqueur	1.1	0.4	3.07	Cordon Negro Brut	1.3	1.6	0.82
High Gravity Lager	0.0	0.0	2.96	Magners Cider	7.8	9.6	0.80
Courvoisier Cognac	69.6	24.0	2.89	Berghoff Beer	1.9	2.4	0.79
King Cobra Malt Liqueur	24.5	9.3	2.62	Pilsener Urquell Beer	0.3	0.4	0.75
Colt 45 Malt Liqueur	28.9	11.3	2.57	Alize Liqueur	0.2	0.2	0.72
Das Komet Vanilla Liqueur	0.2	0.1	2.35	Romana Sambuca Liqueur	0.2	0.3	0.71
Zima Vibe Malt Beverage	1.4	0.6	2.31	Baileys Irish Cream Liqueur	26.6	37.5	0.71
Sauza Diablo	36.0	15.7	2.30	Varmeer Dutch Chocolate Cream Liqueur	1.4	2.1	0.69
Zima Clear Malt Beverage	0.3	0.1	2.28	Becks Light Beer	4.1	6.0	0.68
J&B Scotch	24.9	11.4	2.19	Labatt Beer	5.3	8.0	0.65
Pabst Blue Ribbon Beer	0.0	0.0	2.08	Twisted Tea Malt Beverage	20.3	31.3	0.65
Stolichnaya Vodka	49.4	24.2	2.04	Rutherford Hill Wine	0.6	0.9	0.64
Jagermeister Liqueur	2.2	1.1	2.02	Warsteiner Beer	0.1	0.1	0.63
Rolling Rock Beer	32.9	17.1	1.93	Seagrams 7 Crown Whiskey	3.2	5.1	0.63
Heineken Beer	221.5	117.5	1.89	Jack Daniels Country Cocktails	0.3	0.5	0.62
Miller Genuine Draft	144.6	78.5	1.84	Bartles & Jaymes Wine Cooler	0.0	0.1	0.60
Beefeater Gin	26.5	14.4	1.84	Cointreau Liqueur	0.1	0.2	0.52
Red Bull Malt Liqueur	4.9	2.7	1.83	Pucker Schnappes	3.8	7.9	0.48
Mike's Iced Tea Malt Beverage	22.3	12.3	1.82	Cerveza Mexicali	0.0	0.0	0.47
Amstel Light Beer	232.6	136.8	1.70	Crown Beer	7.5	16.1	0.47
Hennessy Cognac	31.8	18.7	1.70	Southern Twist Liqueur	0.1	0.3	0.46
Icehouse Ice Beer	8.0	4.8	1.68	Citra Wine	1.5	3.2	0.46
Sam Adams Octoberfest Seasonal Brew	0.0	0.0	1.68	Wild Vines Wine	1.1	2.4	0.45
Seagrams Wine Coolers	32.1	20.6	1.56	Seagrams VO Canadian Whiskey	2.0	4.4	0.45
Coors Light Beer	243.3	166.2	1.46	Jack Daniels Whiskey	0.2	0.4	0.44
Sam Adams Light Beer	19.0	13.0	1.46	Santa Margherita Wine	20.5	47.9	0.43
Malibu Rum	36.0	25.0	1.44	Ernest & Julio Gallo Wine	0.2	0.4	0.40
Kahlua Liqueur	69.5	48.5	1.43	Cavit Wine	18.9	54.6	0.35
Dos Equis Beer	42.4	29.9	1.42	Busch Beer	6.7	19.3	0.35
Miller Lite	228.9	161.5	1.42	Absolut Vodka	2.9	8.4	0.34
Olde English 800	17.1	12.1	1.42	Conchito Wines	0.5	1.5	0.34
OP Vodka	1.8	1.3	1.38	Titos Handmade Vodka	0.1	0.2	0.32
Sauza Tequila	18.0	13.3	1.35	Bella Sera Wine	12.4	39.1	0.32
Stolichnaya Citrona	10.9	8.1	1.34	Redwood Creek Wine	8.1	26.5	0.30
Hurricane Malt Liqueur	9.9	7.5	1.33	Freixenet Wine	0.0	0.0	0.30
TGI Fridays Frozen Drinks	10.1	7.6	1.32	Cellar of the Devil Wine	2.0	6.6	0.30
Mike's Hard Lemonade Malt Beverage	77.8	59.4	1.31	Rebitso Wine	0.2	0.7	0.29
B&B Cognac	0.6	0.5	1.31	Martini & Rossi Wine	0.0	0.1	0.26
Budweiser Beer	338.0	262.4	1.29	McPherson Wine	0.3	1.4	0.24
Tequila Beer	116.0	93.4	1.24	Korbel Brandy	0.0	0.1	0.23
Arbor Mist Wine	0.8	0.7	1.22	Grey Goose Vodka	0.1	0.3	0.21
Michelob Beer	181.9	151.1	1.20	Walnut Crest Wine	0.5	2.3	0.21
Guinness Stout	27.0	22.5	1.20	Old Style Beer	0.6	3.6	0.17
Guinness Beer	38.8	33.0	1.18	Barton Beers	0.0	0.0	0.16
Martell Cognac	6.3	5.5	1.15	Wild Turkey Bourbon Whiskey	0.0	0.2	0.15
Bacardi Silver Malt Liqueur	35.7	31.2	1.14	Baron Herzog Wine	0.2	1.1	0.15
Korbel Champagne	0.3	0.2	1.14	Moosehead Beer	0.2	1.4	0.13
Doc Otis Hard Lemon Malt Beverage	77.5	69.3	1.12	Keystone Beer	0.0	0.1	0.12
Southern Comfort	48.2	43.2	1.11	Fotran Kosher Wine	0.1	0.6	0.11
Sam Adams Beer	159.0	143.3	1.11	Veuve Clicquot Champagne	0.3	3.1	0.10
Becks Beer	36.8	33.3	1.11	Moet & Chandon Champagne	0.0	0.6	0.08
Seagrams Gin	6.8	6.3	1.09	Bolla Wine	0.1	1.4	0.08
Bass Ale	61.6	57.6	1.07	Johnnie Walker Scotch Whiskey	0.1	1.6	0.07
Harp Lager	14.2	13.5	1.05	Monthaven Coastal Wine	0.0	0.1	0.07
Special Export Beer	11.4	10.8	1.05	Red Tail Ale	0.0	0.1	0.07
Bud Light Beer	191.1	182.9	1.04	Sutter Home Wine	0.0	0.1	0.06
Cutty Sark Scotch	0.1	0.1	1.04	Mezza Corona Wines	0.0	0.1	0.06
Lone Star Beer	9.8	9.4	1.04	Rotari Italian Sparkling Wines	0.0	0.1	0.06
Killarneys Red Lager	42.2	40.6	1.04	Snowman Ale	0.0	0.0	0.06
Red Stripe Beer	10.1	9.8	1.04	Johnnie Walker Black Label Scotch	0.0	0.9	0.04
Smirnoff Ice Malt Beverage	25.0	24.4	1.03	Redhook Ale	0.0	1.3	0.04
Bacardi Breezers Rum Coolers	0.1	0.1	1.00	San Giuseppe Wines	0.0	0.1	0.01
Killians Variety Beers	20.0	20.0	1.00	Bouchard Wine	0.0	0.5	0.01
Fosters Beer	24.4	24.7	0.99	Bunrati Meads	-	0.0	n/a
Tanqueray Gin	7.3	7.5	0.98	Manischewitz Wine	-	0.0	n/a
Dewars 12 Scotch Whiskey	0.2	0.2	0.94	Beaulieu Vineyard Wines	-	-	n/a
Miller High Life	5.0	5.3	0.94	Early Times Bourbon Whiskey	-	-	n/a
Grant Burge Wine	0.1	0.1	0.93	Woodbridge Wine	-	-	n/a
Jose Cuervo Tequila	4.5	4.9	0.92	Steinlager Beer	-	-	n/a
Captain Morgan Rum	40.6	44.2	0.92	Riunite Wine	-	-	n/a
Tuaca Liqueur	1.3	1.4	0.90	No Product Specified	539.2	509.4	1.06
Bud Ice Draft Beer	2.3	2.6	0.89				
Total				Total	4,214.0	3,405.3	1.24

Source: Media Monitors, Arbitron Ratings

Appendix C – Table 3

African-American Youth (12-20) vs. African-American Adult (21+) Overexposure by Brand

Brand	GRPs 12-20	GRPs 21+	12-20 : 21+ GRP Ratio	Brand	GRPs 12-20	GRPs 21+	12-20 : 21+ GRP Ratio
Das Komet Vanilla Liqueur	0.2	0.0	4.81	Kocani Beer	0.2	0.3	0.66
Natural Light Beer	0.1	0.0	3.55	Dos Equis Beer	3.3	5.1	0.65
Otra Beer	3.3	1.1	2.86	Doc Otis Hard Lemon Malt Beverage	14.9	23.0	0.65
Asahi Beer	7.1	2.8	2.54	Sam Adams Octoberfest Seasonal Brew	0.0	0.0	0.64
Beaulieu Vineyard Wines	0.2	0.1	2.43	Molson Beers	5.7	9.5	0.60
OP Vodka	2.5	1.2	2.11	Martell Cognac	48.4	82.5	0.59
Lancers Wine	0.1	0.0	2.01	Sam Adams Light Beer	1.1	1.9	0.58
Midori Liqueur	9.3	4.7	1.98	Baileys Irish Cream Liqueur	52.0	94.1	0.55
Tequila Rose Liqueur	1.2	0.6	1.95	Seagrams 7 Crown Whiskey	1.2	2.2	0.54
Seagrams Wine Coolers	61.2	34.1	1.80	Tanqueray Gin	7.5	14.0	0.54
Stoichnaya Citrona	4.0	2.2	1.77	Bass Ale	11.6	22.1	0.52
Old Milwaukee Beer	0.7	0.4	1.74	Captain Morgan Rum	23.8	45.9	0.52
Tuaca Liqueur	0.7	0.4	1.73	Seagrams Gin	30.2	60.2	0.50
Schlitz Malt Liqueur	8.0	4.7	1.72	Labatt Beer	3.6	7.2	0.50
Bacardi	15.1	8.9	1.69	Twisted Tea Malt Beverage	5.2	10.9	0.48
Jagermeister Liqueur	0.2	0.1	1.62	Sam Adams Beer	27.0	56.8	0.47
Sauza Diablo	22.7	14.9	1.52	Guinness Stout	17.2	37.0	0.46
Red Bull Malt Liqueur	9.9	6.7	1.48	Wild Vines Wine	2.4	5.3	0.46
Heineken Beer	233.5	168.5	1.39	Rutherford Hill Wine	0.2	0.4	0.43
Zima Vibe Malt Beverage	2.0	1.5	1.36	Romana Sambuca Liqueur	0.2	0.4	0.42
Riunite Wine	0.1	0.0	1.32	Southern Twist Liqueur	0.0	0.1	0.42
Coors Light Beer	407.8	308.8	1.32	Ernest & Julio Gallo Wine	1.6	4.0	0.41
Miller Genuine Draft	196.7	152.1	1.29	Citra Wine	4.1	10.1	0.40
Bacardi Silver Malt Liqueur	42.9	33.4	1.28	Killarneys Red Lager	4.8	12.1	0.39
Mike's Iced Tea Malt Beverage	3.5	2.8	1.28	Crown Beer	19.3	49.7	0.39
Sauza Tequila	6.0	4.7	1.27	Cellar of the Devil Wine	0.5	1.3	0.39
Cutty Sark Scotch	0.0	0.0	1.27	McPherson Wine	0.3	0.7	0.38
Remy Martin Cognac	59.4	48.1	1.23	Magners Cider	2.4	6.3	0.38
Miller Lite	185.2	151.0	1.23	Wild Turkey Bourbon Whiskey	0.0	0.1	0.37
Lowenbrau Beer	0.9	0.7	1.20	Chivas Regal Scotch	11.7	32.4	0.36
Fosters Beer	12.0	10.1	1.19	Walnut Crest Wine	0.6	1.8	0.35
Bud Ice Draft Beer	38.8	33.3	1.16	Warsteiner Beer	0.0	0.0	0.34
Special Export Beer	15.9	13.8	1.15	Redwood Creek Wine	11.5	35.7	0.32
Amstel Light Beer	174.4	153.3	1.14	Absolut Vodka	13.7	43.3	0.32
Courvoisier Cognac	216.6	194.7	1.11	Conchito Wines	0.3	0.9	0.31
Rolling Rock Beer	5.8	5.4	1.07	Arbor Mist Wine	0.5	1.5	0.31
King Cobra Malt Liqueur	100.2	93.5	1.07	Jack Daniels Whiskey	0.1	0.4	0.31
Barties & Jaymes Wine Cooler	0.0	0.0	1.06	Berghoff Beer	0.5	1.8	0.30
High Gravity Lager	0.4	0.4	1.06	Alize Liqueur	1.9	6.4	0.30
Icehouse Ice Beer	39.6	37.9	1.05	Fraixenet Wine	0.0	0.0	0.29
Killians Variety Beers	8.0	7.8	1.04	Korbal Brandy	0.0	0.1	0.28
Southern Comfort	33.7	33.0	1.02	Pilsener Urquell Beer	0.1	0.2	0.27
Tequila Beer	51.1	50.1	1.02	Early Times Bourbon Whiskey	0.1	0.5	0.27
Colt 45 Malt Liqueur	68.3	67.3	1.01	Bouchard Wine	0.1	0.4	0.26
Guinness Beer	12.1	12.1	0.99	Seagrams VO Canadian Whiskey	1.5	5.7	0.26
Caffreys Irish Ale	1.5	1.5	0.97	Busch Beer	2.4	9.4	0.25
Bacardi Breezers Rum Coolers	0.4	0.4	0.96	Korbal Champagne	0.2	0.8	0.24
J&B Scotch	33.5	34.9	0.96	Pucker Schnappes	2.9	12.7	0.23
Jose Cuervo Tequila	2.1	2.2	0.94	Titos Handmade Vodka	0.1	0.4	0.22
Budweiser Beer	512.7	549.5	0.93	Cavit Wine	23.5	109.3	0.21
B&B Cognac	6.9	7.4	0.93	Fotran Kosher Wine	0.1	0.4	0.21
Hennessy Cognac	92.4	99.3	0.93	Cointreau Liqueur	0.0	0.0	0.21
Old English 800	60.0	64.7	0.93	Bella Sara Wine	10.0	50.3	0.20
Schnappes Liquors	0.2	0.2	0.93	Veuve Clicquot Champagne	0.6	3.2	0.18
Lone Star Beer	0.4	0.4	0.93	Rubitsa Wine	0.0	0.2	0.18
Beefeater Gin	22.9	25.4	0.90	Santa Margherita Wine	9.7	58.9	0.17
Michelob Beer	313.0	351.9	0.89	Manischewitz Wine	0.1	0.7	0.15
Harp Lager	5.9	6.7	0.88	Moosehead Beer	0.2	1.5	0.14
Bud Light Beer	299.9	343.4	0.87	Bunrati Meade	0.0	0.0	0.14
Mike's Hard Lemonade Malt Beverage	18.2	21.1	0.86	Bolla Wine	0.2	1.8	0.14
Jack Daniels Country Cocktails	2.6	3.0	0.85	Baron Herzog Wine	0.2	1.9	0.12
Miller High Life	1.8	2.1	0.84	Old Style Beer	0.4	3.4	0.10
Malibu Rum	26.5	31.9	0.83	Johnnie Walker Scotch Whiskey	0.5	4.7	0.10
Vermeer Dutch Chocolate Cream Liqueur	3.9	4.8	0.82	Red Tail Ale	0.0	0.1	0.07
Zima Clear Malt Beverage	0.2	0.3	0.82	Rotari Italian Sparkling Wines	0.0	0.1	0.07
Red Stripe Beer	2.1	2.5	0.81	Moet & Chandon Champagne	0.1	1.6	0.07
Martini & Rossi Wine	0.0	0.0	0.79	Mezza Corona Wines	0.0	0.1	0.07
Kahlua Liqueur	81.8	104.5	0.78	Monthaven Coastal Wine	0.0	0.1	0.07
Stoichnaya Vodka	22.7	29.1	0.78	San Giuseppe Wines	0.0	0.1	0.05
Hard Core Hard Cider	0.5	0.7	0.77	Redhook Ale	0.0	0.8	0.05
Becks Beer	26.5	35.0	0.76	Grey Goose Vodka	0.0	0.5	0.05
Hurricane Malt Liqueur	53.8	71.2	0.76	Woodbridge Wine	0.0	0.0	0.04
Cerveza Mexicali	0.0	0.0	0.76	Barton Beers	0.0	0.3	0.03
Cordon Negro Brut	0.5	0.7	0.74	Johnnie Walker Black Label Scotch	0.0	0.7	0.01
Smirnoff Ice Malt Beverage	27.3	36.9	0.74	Snowman Ale	-	0.0	n/a
Becks Light Beer	8.6	11.8	0.73	Sutter Home Wine	-	0.0	n/a
TGI Fridays Frozen Drinks	21.0	29.6	0.71	Grant Burge Wine	-	0.0	n/a
Michael's Wines	0.0	0.0	0.71	Keystone Beer	-	0.0	n/a
Dewars 12 Scotch Whiskey	0.0	0.0	0.69	Steinlager Beer	-	-	n/a
Pabst Blue Ribbon Beer	2.3	3.4	0.68	No Product Specified	643.7	709.3	0.91
Coors Beer	7.7	11.3	0.68				
Total				4,747.4	5,223.1	0.91	

Source: Media Monitors, Arbitron Ratings

Appendix D

Table 1: Weekday Daypart Distribution Comparison - Media Monitors vs. BVS

Daypart	Media Monitors 2001-2002 Total *		BVS 12/15/02 - 1/31/03	
	Youth 12-20		Youth 12-20	
	GRPs **	% Weekday	GRPs **	% Weekday
M-F 6:00AM - 10:00AM	1,263	21%	24	16%
M-F 10:00AM - 3:00PM	1,607	27%	38	25%
M-F 3:00PM - 7:00PM	1,863	31%	54	35%
M-F 7:00PM - 12:00M ***	1,283	21%	37	24%
Monday-Friday Subtotal	6,016		153	

Notes

* MMI market subset - includes only markets monitored 6 a.m. to 11 p.m. M-F

** All GRPs were calculated as aggregates for measured markets

*** 7 p.m. to 11 p.m. for Media Monitors; 7 p.m. to midnight for BVS

Source: Media Monitors, BVS, Arbitron Ratings

Appendix E

The BVS case study monitored multiple radio commercials for a selection of brands during December 2002 and January 2003. Because this is typically not a heavy period for alcohol advertising on radio in general, brands to be monitored were selected based on whether they had introduced new advertising creative on radio between September and November of 2002. Six brands were originally selected for monitoring based on this criterion. These six brands included a range of beer, low-alcohol refresher, and distilled spirits brands. For these six brands, in addition to these “first occurrence” spots, and in order to obtain a greater number of occurrences and hence a more representative sample for each brand, for any brand for which any spots were submitted based on recent first occurrence, all spots for those brands which had a first occurrence in 2002 were also identified.

On this basis, a total of 26 radio ads were downloaded from VMS (Video Monitoring Services) and forwarded to BVS (Broadcast Verification Service) for encoding. Two spots were rejected for poor audio quality. Of the 24 spots encoded by BVS, 12 were ultimately captured between December 15 and January 31. A few of these spots were captured before December 15, but not all spots were encoded until then. Only brands with 50 or more occurrences were included in the analysis, omitting Grey Goose Vodka, for which only three occurrences were tracked during the monitoring period. A total of 11,712 occurrences of the final 11 spots were matched with audience data from Arbitron, and GRPs and GRP ratios were calculated.

Most brands had an array of markets and ran for the full six weeks. The monitored Heineken and Jack Daniels spots ran only until December 29. The Jack Daniels Original Hard Cola spots were monitored in one market only—Springfield, MO—but this brand was advertised in other markets after its summer 2002 launch. All other spots ran in multiple markets (between 14 and 43 of the 103 total markets monitored by BVS).

It was not the objective of this case study to measure a representative sample of all alcohol radio advertising. The primary objective was to capture a sample of alcohol radio advertising in the period of December to January. The case study did not attempt to capture all radio advertising for those brands. Specifically, it did not include live announcer spots (these are not reliably tracked by VMS); other spots that may not have been picked up by VMS; spots that ran in markets or on stations not monitored by BVS; and spots that may have first run before 2002. Also, the case study did not include any additional radio creative for these brands that may have been launched after monitoring began.



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