Young People and Alcohol Advertising

An investigation of alcohol advertising following changes to the Advertising Code

Publication date: November 2007

Contents

Section		Page
1	**Executive summary**	3
2	**Background and research objectives**	10
3	**The context: young people and drinking**	18
4	**Analysis of advertising trends 2002-2006**	36
5	**Appeal of alcohol advertising**	46

Section 1
Executive summary

Background

- Ofcom (the Office of Communications) is the regulator of the UK communications industries, with responsibilities across television, radio, telecommunications and wireless communications services. Ofcom was established on 29 December 2003 and replaces the Independent Television Commission (ITC), the Radio Authority, the Broadcasting Standards Commission, Oftel and the Radio Communications Agency.

- The Advertising Standards Authority (ASA) is the UK self-regulatory body for ensuring that all advertisements are legal, decent, honest and truthful. The ASA was established in 1962 by the marketing industry in order to regulate advertisements appearing in the non-broadcast media (e.g. press, poster, cinema). Marketing communications in the non-broadcast media must comply with the British Code of Advertising, Sales Promotion and Direct Marketing (the CAP Code).

- The Communications Act 2003 requires Ofcom to review its functions and to have regard to the extent to which its duties are likely to be furthered or secured by effective self- regulation. Against this background, Ofcom decided that a self-regulatory approach to broadcast advertising regulation might be better equipped to handle the growing issues of convergence raised by the growth of digital communications than the current statutory system. It also believed that a single point of contact for consumers for advertising issues across all media might serve the public better than the fragmented approach to advertising regulation.

- Therefore, in November 2004, Ofcom delegated day-to-day responsibility for applying the broadcast advertising codes to the ASA (Advertising Standards Authority). At the same time, responsibility for the TV and Radio Advertising Standards Codes themselves was delegated to the Broadcast Committee of Advertising Practice (BCAP), the industry rule-making body, comprising advertisers, agencies and broadcast media. BCAP can only make changes to the Codes with Ofcom's agreement and following public consultation, having consulted the independent Advertising Advisory Committee (AAC).

- Earlier, in July 2004, Ofcom had consulted on proposals to revise Section 11.8 of the Advertising Standards Code for television advertising relating to alcoholic drinks. The decision to review the rules came from a background of widespread concern about the drinking behaviour amongst teenagers and young adults, including excessive or binge drinking or anti-social behaviour associated with drinking. One of the first tasks for BCAP, following contracting-out, was to devise Notes of Guidance completing the proposed alcohol advertising regime.

- Following consultation, the new rules for television advertising came into force on 1 January 2005 with a 'grace period' until 30 September 2005 for advertisers who might have already committed themselves to campaigns which might not comply with the revised rules. In tandem with this process the Committee of Advertising Practice (CAP) amended the alcohol rules in the non-broadcast advertising Code. Amongst other objectives, the changes to the Codes were aimed at preventing alcohol

advertising having a strong appeal to 'under 18s' and, in particular, being associated with youth culture. For example a new rule in the TV Code requires that alcohol advertising 'must not be likely to appeal strongly to people under 18, in particular by reflecting or being associated with youth culture'.

- The new rules have now been in place for more than two years and the research study conducted in 2005[1] which provided a benchmark for understanding attitudes towards 'alcohol advertising' has been updated to look at any post-regulatory changes in attitudes.

Measuring the impact of regulatory change

- The main objective of this research is to measure the extent to which the changes to the alcohol advertising rules made in 2005 may have impacted on the *appeal* of a selection of alcohol advertisements to people under the age of 18 years. The research specifically deals with the Advertising Standards Code changes to television advertising of alcohol.

- This report contains findings of the research conducted post-regulatory change among 11-21 year olds in the UK. The study has been designed in a similar way to the benchmarking study published in 2005 and the main objective and methodology remains the same – investigating the appeal of a selection of alcohol advertisements using qualitative and quantitative research techniques.

- There are two key differences between the 2005 study and this post-wave study:

    - The benchmarking study looked in detail at drinking behaviour and general attitudes to alcohol and, due to the multi-faceted relationship between young people and alcohol, these findings are unlikely to have changed dramatically over the past two years and so have not been researched in as much depth in the post-wave research.

    - The alcohol advertisements tested between the two waves of research are different. In both the pre and post regulatory waves of research the executions were chosen as examples of advertising styles and techniques that were aimed at the younger end of the legitimate alcohol market, but which were thought likely also to appeal to 'under 18s', rather than because they were representative of executions within the alcohol category before and after regulatory change. It is worth noting, however, that the process of initially identifying executions which met these criteria was more difficult in 2007, indicating anecdotal evidence of a decline in the *quantity* of executions likely to appeal to under 18 year olds following regulatory change. As a result the commercials tested in the post wave now represent to some extent the edgier end of the market. It is also important to note that at the time of

[1] Ofcom/ASA (2005) *Young People and Alcohol Advertising – An investigation of alcohol advertising prior to the Advertising Code changes.* http://www.asa.org.uk/NR/rdonlyres/CC8127C7-D1AE-4092-99B0-335FE2F2A221/0/alcohol_research_2005.pdf

undertaking both pieces of research, the commercials tested were compliant with rules in place at that time.

- Ofcom and the ASA commissioned independent research agency, Ipsos MORI, to conduct bespoke qualitative and quantitative research amongst 11-21 year olds. In addition analysis was conducted by Ofcom to look at changes in advertising trends based on Nielsen Media data.

- In seeking to understand the change in appeal of a selection of commercials, a number of areas were tested; the recall of advertising, likeability, whether the commercials were seen by young people as being aimed at them, whether they thought the commercial made the drink look appealing and whether it would encourage people to drink. Looking at whether or not the adverts are seen by young people as being aimed at them is particularly relevant in relation to the objectives of the Code changes.

- Due to the multi-faceted relationship between young people and alcohol, this research can only go so far in understanding the impact of regulatory change. The appeal of individual advertisements and the factors that drive appeal can be tested and to some extent compared. However, it is important to note that the alcohol advertising market now is different to that researched in 2005. There is considerably less exposure to alcohol advertising on television amongst young people in 2007 compared with 2005 and the types of product being advertised are markedly different – so the pre and post wave studies are not directly comparable.

- Some clear findings can be drawn from the research but due to changes in the alcohol advertising market and cultural changes which have taken place between the two waves these cannot be conclusively attributed to the changes in the Advertising Code.

Summary of changes to the Advertising Code

- Reflecting the Government's concerns that were expressed in its *Alcohol Harm Reduction Strategy*, the Advertising Code was strengthened in four main ways so that the new, 2005, restrictions were stricter on:

    - the general appeal of alcohol ads to young persons, especially under-age drinkers, and references to "youth culture";

    - linking alcohol with sex, sexual activity or sexual success;

    - linking alcohol with aggressive, anti-social or irresponsible behaviour and

    - the depiction of irresponsible handling or serving of alcohol.

Research objectives

- The overarching purpose of this research is to measure the extent to which the alcohol advertising rule changes have impacted on the appeal of alcohol advertising

to young people under the age of 18. In line with the 2005 study, the more specific objectives of this research were to explore:

- Young people's relationships with drinking and alcohol – for example when they start to drink and the amount they are drinking.
- The extent to which a selection of alcohol advertisement, which can be described as the edgier end of the market or may be considered 'borderline', appeal to young people under 18 years of age.
- If there are alcohol advertisements that do appeal to young people under 18 years of age, why they appeal.

- To meet these objectives, Ipsos MORI conducted both qualitative and quantitative research between February-June 2007. The focus of both these pieces of research was exploring young people's reaction to alcohol advertising in the post-regulatory change culture, and what appeal adverts had at this time.

- The qualitative research consisted of 11 discussions groups across the country with young people aged 14-21 years. As in 2005, the quantitative phase followed the qualitative research as the findings of the qualitative study informed the decision making process around which commercials to test in the survey. The set up of the 2007 quantitative phase was kept as close as possible to that of the 2005 benchmarking study. Interviews were conducted among a representative sample of 1,514 young people aged 11–21 years across the UK.

- A number of advertisements were tested at both the qualitative and quantitative research stages. As with the benchmarking study the advertisements used in the post-wave study were not a random selection and, as the scope of such a project determines, are not representative of all adverts in the category. A combination of sources were used to select the commercials, including an analysis of trends in advertising activity, the findings of the 2005 research, how appealing the commercials were thought to be to young people and how appealing the actual products were thought to be to young people.

The context: young people & drinking

- The research has identified a number of changes in reported drinking behaviour between the pre and post waves of research.
  - Based on our survey the proportion of 11-13 year olds who have never drunk alcohol has increased from 31% in 2005 to 46% in 2007. This is consistent with the findings of the 2007 Home Office report[2] which found that there has been an increase in the proportion of 11-15 year olds who claim not to drink alcohol since 2001.

[2] HM Government (June 2007) *Safe. Sensible. Social. The next steps in the National Alcohol Strategy*. http://www.homeoffice.gov.uk/documents/Alcohol-strategy.pdf?view=Binary

- Alcopops have declined in popularity – when asked about the brands of alcohol that they drink mentions of alcopops overall have dropped from 69% to 58%. This is particularly the case for those aged 14 or over.

- In line with general fashions in alcohol consumption, there has been an increase in the amount of cider that young people report drinking. This is particularly the case among 14-17 and 18-21 year olds – three in ten young people from both these groups have drunk cider in the last six months (compared to 14% and 11% respectively in 2005).

- According to this study, there has been very little change in the proportion of 11-17 year olds saying they regularly drink to get drunk between the two waves of research. The age at which it is most common for young people to report regularly drinking to get drunk is now 20 and 21 years old and there has been a significant fall in the proportion of 18-19 year olds regularly drinking to get drunk.

- These key changes appear to indicate some shifts in young people's drinking behaviour that can potentially be seen as positive – particularly the later age at which young people start drinking.

Analysis of advertising trends

- Television remains the key advertising medium for alcohol advertisers, representing an above average share of media spend in 2006 – 49.1% of total alcohol media spend compared with 43.2% of total UK advertising spend. However, television's share of total alcohol media spend has been in steady decline (down from 65.1% in 2002 to 49.1% in 2006) as outdoor, press and radio account for a growing proportion of spend.

- Television advertising spend within the alcoholic drinks category fell 21.1%(2005-6) , driving the overall fall in alcoholic drinks media spend (-12.0% between 2005 and 2006). Over the same period, spend on outdoor and radio advertising increased by 14.6% and 22.5% respectively.

- Lager brands continue to dominate alcohol advertising, accounting for 34.0% of total media spend in 2006. The greatest shifts in spend have been across the cider market which increased its share of total alcohol media spend from 1.3% in 2002 to 11.8% in 2006 and a fall in the proportion of total media spend represented by alcopops from 12.8% in 2002 to 4.0% in 2006.

- The proportion of television spend represented by the cider market increased from 1.8% in 2002 to 15.5% in 2006 – over the same period the proportion of alcohol television advertising spend accounted for by alcopop brands fell from 14.0% to 2.3%.

- In volume terms (commercial spots aired), alcohol television advertising increased by 7.4% between 2005 and 2006 driven in the main by increased activity across the cider market. The volume of alcopop advertising fell 67.6% between 2005-2006.

- Despite the increase in commercial spots and in line with the changes in advertising spend there has been an increase in exposure to cider advertising and brands classified by Nielsen Media under the 'alcoholic drinks range' sub-category and a fall in exposure to alcopop advertising.

- Overall, children and young adults are being exposed to fewer alcohol commercials on television. There was a 6.0% decline in the alcohol impacts[3] delivered against 16-24 year old adults between 2005 and 2006 and a 15.5% fall in impacts amongst children aged 10-15.

- Compared with 2002, the decline in exposure to alcohol advertising on television is more marked. Between 2002-2006 there has been a decline of 31.1% and 39.0% in 16-24 and 10-15 year olds advertising impacts respectively.

Appeal of alcohol advertising

- Recall of alcohol advertising has declined between the two waves of research. There has been a significant decline in the average number of unprompted mentions of alcohol adverts from 3.95 to 3.31. Among the different sub-categories of drinks, there was a decline in recall of beer, alcopop, vodka and spirit advertising and an increase in recall of cider advertising.

- A comparison of media activity during the pre and post waves[4] of research shows that total alcohol advertising spend fell by 2.9% and television advertising spend fell 26.2%. Between the two phases of research, there was a decline in spend across the beer, alcopops and spirits sub-categories and an increase in advertising spend among vodka and cider brands.

- Therefore with the exception of vodka, the downward shift in television advertising spend was matched by a downward shift in advertising recall – and for cider the increase in spend was accompanied by an increase in recall. Based on this analysis it is not possible to attribute the fall in recall of alcohol advertising to a reduction in appeal of advertising as most changes in recall are mirrored by changes in advertising spend.

- Making like for like comparisons between the adverts from the 2005 and 2007 waves of research must be approached with caution. However, based on a range of measures used to test the broad appeal of each television commercial tested in the quantitative stage, the following conclusions can be made:

    - The likeability of adverts (based on a ranking of advertisements from 1-10, 1 for 'don't like it at all' and 10 for 'like it a lot') has not changed between the two waves of research.

    - Young people are less likely to say that they feel the adverts are aimed at them

[3] Exposure to television advertising is measured in terms of commercial impacts. One impact is equivalent to one member of the target audience viewing one commercial spot.
[4] In order to understand the trends in recall within the context of media activity during these periods we have analysed advertising activity during December 2004-June 2005 for the benchmarking study and December 2006-June 2007 for the post-wave research.

- However, young people are more likely to say that the adverts make the drink look appealing and that they will encourage people to drink.

Conclusions

- In 2005 when the Advertising Code changes came into force it was felt necessary to provide a benchmark by which the appeal of future commercials would be measured.

- However, since the Advertising Code changes came into place in 2005 and between the two waves of research there have been considerable market and cultural changes (such as changes in licensing laws, changes in the types of drinks consumed, etc) which have meant that the two waves are not directly comparable and it would be difficult to untangle the impact of these changes on young people's attitudes and behaviour towards both alcohol and alcohol advertising.

- The alcohol advertising market has changed significantly, particularly with regards to television advertising. Television advertising spend has declined and young people are exposed to less television advertising for alcohol products. The recall of alcohol advertising has declined since 2005 and is most probably linked to this decline in advertising spend.

- There has been no change in how much young people say they like the adverts and there has been an increase in those saying the adverts make the drink look appealing and would encourage people to drink it. Importantly, however, given the objectives of the Advertising Code changes, there has been a decline in the proportion of young people saying they feel the commercials are aimed at them.

Section 2

Background and research objectives

Background

The 'Young People and Alcohol Advertising,' report published by Ofcom and the ASA in 2005[5] reported on the findings of a benchmarking wave of qualitative and quantitative research investigating the appeal of a selection of alcohol advertisements to 11-21 year olds.

The pre-regulatory change study looked in detail at young people's general attitudes to alcohol, their drinking behaviour, their brand awareness and brand choices. This provided essential context to the consideration of the appeal of specific campaigns which aired pre-regulatory change. As mentioned in the 2005 study there are a number of other, more powerful influences alongside advertising that affect young peoples' attitudes and behaviours in relation to alcohol including family background, peer pressure and the wider culture.

This report contains findings of the research conducted post-regulatory change among 11-21 year olds in the UK. The study has been designed in a similar way to the benchmarking study published in 2005 and the main objective and methodology remains the same – investigating the appeal of a selection of alcohol advertisements using qualitative and quantitative research techniques.

There are two key differences between the 2005 study and this post-wave study:

- The benchmarking study looked in detail at drinking behaviour and general attitudes to alcohol and, due to the multi-faceted relationship between young people and alcohol, these findings are unlikely to have changed dramatically over the past two years and so have not been researched in as much depth in the post-wave research.

- The alcohol advertisements tested between the two waves of research are different. In both the pre and post regulatory waves of research the executions were chosen as examples of advertising styles and techniques that were aimed at the younger end of the legitimate alcohol market, but which were thought likely also to appeal to 'under 18s', rather than because they were representative of executions within the alcohol category before and after regulatory change. It is worth noting, however, that the process of initially identifying executions which met these criteria was more difficult in 2007, indicating anecdotal evidence of a decline in the *quantity* of executions likely to appeal to under 18 year olds following regulatory change. As a result the commercials tested in the post wave now represent to some extent the edgier end of the market. It is also important to note that at the time of undertaking both pieces of research, the commercials tested were compliant with rules in place at that time.

[5] Ofcom/ASA (2005) *Young People and Alcohol Advertising – An investigation of alcohol advertising prior to the Advertising Code changes.* http://www.asa.org.uk/NR/rdonlyres/CC8127C7-D1AE-4092-99B0-335FE2F2A221/0/alcohol_research_2005.pdf

As with the benchmarking study, a piece of media analysis was also conducted to understand the advertising marketplace. This analysis proved to be particularly crucial at this stage as it highlighted some dramatic changes in the advertising market for alcoholic drinks. As a result, the findings of this analysis played a key role in informing the decision making process around the advertising stimulus to use in the bespoke research.

Research objectives

The overarching purpose of this research is to measure the extent to which the alcohol advertising rule changes have impacted on the appeal of alcohol advertising to young people under the age of 18. In line with the 2005 wave, the more specific objectives of this research were to explore:

- Young people's relationships with drinking and alcohol – for example when they start to drink and the amount they are drinking.
- The extent to which a selection of alcohol advertisements which can be described as the edgier end of the market or may be considered 'borderline' appeal to young people under 18 years of age.
- If there are alcohol advertisements that do appeal to young people under 18 years of age, why they appeal.

Methodology

To meet these objectives, Ipsos MORI conducted both qualitative and quantitative research between February-June 2007. The focus of both pieces of research was to explore young people's reaction to alcohol advertising in the post-regulatory change culture, and what appeal adverts had at this time. In contrast to the 2005 study, in 2007 the wider context of young people's relationship with alcohol was more limited, focussing principally on young people's drinking behaviour.

Qualitative phase

In 2007 11 discussions groups were conducted across the country with young people aged 14-21 years. Participants were recruited according to the same sets of quotas as in the pre-wave stage in 2005.

Details of the groups and locations are shown in Table 1.

Table 1 Sample profile – Qualitative research

Age (years) and gender	Education/working status	No of groups	Region	Location
14-15 males	In education, Years 10 and 11	1	Northern Ireland	Belfast-inner city
16–17 females	In education, A level students	1	Northern Ireland	Belfast–inner city
14–15 females	In education, Years 10 and 11	1	Wales	Carmarthen – rural
16–17 males	In education, A level students	1	Wales	Carmarthen – rural
14–15 males	In education, Years 10 and 11	1	Scotland	Glasgow–inner city
16–17 females	In education, A level students	1	Scotland	Glasgow–inner city
14–15 females	In education, Years 10 and 11	1	London	Edmonton-suburban
16–17 males	In education, A level students	1	London	Harrow–suburban
18–21 mixed	Not in education	1	London	Edmonton–suburban
16-17 mixed	Not in education	1	Manchester	Inner city
18–21 mixed	In education	1	Manchester	Inner city

The key objectives of the qualitative stage were to look at the appeal of a number of executions, to analyse the commercials in detail to understand particular aspects of the creative which appeal to young people and why and to then inform the decision making process around which adverts were to be tested in the quantitative study.

Although 11-13 year olds were included in the qualitative phase during the benchmarking study, based on our findings from the 2005 research and given the objectives of the qualitative phase, it was felt more appropriate to conduct the qualitative research in 2007 with those aged 14 or over. In the pre-stage 11-13 year olds were found to be quite literal minded about the adverts compared with the older groups who were more intuitive about the adverts and more insightful about the elements of those adverts that appealed and did not appeal to them.

Twenty advertisements (14 television and 6 press/poster executions) were selected to be shown to participants in the group discussions in rotation. As opposed to 2005, where some non-alcohol brand advertisements were also shown, in 2007 all the advertisements were for alcohol brands.

A debrief presentation was compiled after the end of the qualitative stage which included analysis of all the executions shown to participants and was supported throughout by verbatim comments. This analysis fed into the decision making process around which advertisements to test in the quantitative stage.

Quantitative phase

As in 2005, the quantitative phase followed the qualitative research. The set up of the 2007 quantitative phase was kept as close as possible to that of the 2005 benchmarking study. Interviews were conducted among a representative sample of 1,514 young people aged 11–21 years across the UK. Interviewing took place between 25 April-17 June 2007 and the average length of interview was 19 minutes. Interviews were conducted face-to-face in respondents' homes using CAPI technology (Computer Aided Personal Interviewing).

As in 2005, a random location sampling technique was used to ensure that a representative sample of 11–21 year olds in the UK was achieved. Quotas were set on age and gender, and for those aged 16 years and over, on working status. At the analysis stage the data was weighted to ensure that the final sample was representative of the UK.

The number of advertisements was reduced for the quantitative stage to 11 executions - 8 television and 3 press/poster executions. These 11 executions were selected for testing on the basis that they had generated some appeal among respondents in the qualitative study.

Mirroring the benchmarking study, respondents were shown 5 of these 11 advertisements – 4 television and 1 press or poster advertisement each – during the interview. The advertisements were selected at random from the 11 possible executions.

In order to achieve the most accurate responses from young people, questions relating to drinking behaviour were posed using a self-completion approach. Respondents themselves entered their responses directly onto the laptop for these questions. This approach was a repeat of how these questions were asked in the 2005 study.

In line with Market Research Society regulations and repeating the approach of 2005, permission of a parent or guardian was sought prior to interviewing all young people aged under 16 years. Parents and guardians of those aged 16−17 years were also informed about the study and notified that participants would be exposed to alcohol advertising during the course of the interview.

Advertising stimulus selection

The advertisements used in the study were not a random selection and, as the scope of such a project determines, are not representative of all adverts in the category. In order to select advertising stimulus for the research Ofcom conducted analysis using Nielsen Media data to identify alcohol brands advertised during the last quarter of 2006 and the related spend across all media (television, press, radio, outdoor and cinema) – alongside this analysis was also conducted to understand longer term trends in the alcohol advertising market. This analysis of media spend played a key role in the selection of stimulus in the post-stage, as it revealed dramatic changes in advertising trends across the alcohol market. On completing this analysis a search was carried out in the Thomson Intermedia database to identify the creative executions used during October-December 2006.

Drawing on the findings of the 2005 research, and mindful of key areas highlighted by the revised CAP alcohol codes, while taking care to cover the key sectors of the market as identified in the media analysis, the ASA, Ofcom and Ipsos MORI chose examples of advertising styles and techniques that were aimed at the younger end of the legitimate alcohol market, but which were thought likely also to appeal to 'under 18s'. It is important to note that at the time of undertaking both pieces of research, the commercials tested were compliant with rules in place at that time. The process of initially identifying executions which met these criteria was more difficult in 2007, indicating anecdotal evidence of a decline in the *quantity* of executions likely to appeal to under 18 year olds following regulatory change. As a result the commercials tested in the post wave were to some extent the edgier end of the market.

In summary, the selection criteria were:

- Advertising spend – across all media and in particular on television advertising
- How appealing the advertisements were thought to be to young people aged under 18 years.
- How appealing the actual product/drink was thought to be for young people aged under 18 years (i.e. alcopops were identified as being particularly appealing).
- Whether the advertisements covered the issues/themes which had been highlighted in the revised advertising Code and whether they included, for example:
    - Themes associated with youth culture; e.g. disregard for authority, rebelliousness, mocking authority, juvenile behaviour and immature practical jokes.
    - Fashion or clothing mostly associated with under 18s.
    - Music or dance likely to appeal strongly to under 18s.
    - Language commonly used by the young but rarely by an older generation; e.g. slang or novel words.
    - Cartoons, rhymes or animation likely to have strong appeal to under 18s.
- Achieving a spread across different categories of alcoholic drink.

During the group discussions, participants were shown at least seven advertising executions, including at least two press or poster advertisements. For the quantitative stage, nine executions were excluded because they were found to have no or limited appeal to our sample of 11-21 year olds.

As with the benchmarking research, for reasons of commercial sensitivity, the specific commercials researched have been de-branded within this report.

Research notes

A number of research issues raised in the benchmarking study remain relevant for this post-wave study and are summarised below[6]. In conducting this post-wave research it has become apparent that there is a further research issue that needs to be raised, namely changes in the advertising market, and this is appended to this list of research notes.

Research Note 1: Ofcom and the ASA note that it is notoriously difficult to probe the actual effect and influence of TV advertising because:

- virtually everybody is exposed to advertising so there is no control group against which to make comparisons;

- alcohol advertising is only one of a multitude of factors influencing people's relationship with alcohol, and cause and effect research into this is at best difficult, and at worst, impossible due to the complexity of the interrelationships

Given that the relationship between young people and alcohol is complex and multi-faceted, it is recognised that primary research of this nature can only go so far in understanding the impact of regulatory change. In practical terms, research can investigate the appeal of individual alcohol advertisements and the creative/executional factors that drive appeal, along with brand awareness and brand repertoires.

In this report, analysis of these measures is compared, wherever possible, pre and post regulatory change to establish if any changes in the appeal of selected alcohol advertising have taken place.

Research note 2: As with the benchmarking study the advertisements used in the post-wave study were not a random selection and, as the scope of such a project determines, are not representative of all adverts in the category. A combination of sources were used to select the commercials, including an analysis of trends in advertising activity, the findings of the 2005 research, how appealing the commercials were thought to be to young people and how appealing the actual products were thought to be to young people.

Like for like comparisons between the adverts from the 2005 and 2007 waves of research must be interpreted with caution because they were chosen as examples of advertising styles and techniques that were considered likely to appeal to 'under 18 year olds', rather than because they were representative of executions within the alcohol category before and after regulatory change. It is worth noting, however, that the process of initially identifying executions which met these criteria was more difficult in 2007, indicating anecdotal evidence of a decline in the *quantity* of executions likely to appeal to under 18 year olds following regulatory change.

Research note 3: During the pre-wave study, young people were categorised into three age-groups: 11-13 year olds, 14-16 year olds and 17-21 year olds. These categories were defined on the basis of young people's drinking behaviour as identified by the data

[6] Some of the notes have been amended for this wave of research.

– key changes in which were identified as occurring between the ages of 13 and 14 and again between 16 and 17 years.

During the post-wave study it was felt it would be more appropriate to split the age groups as 11-13 year olds, 14-17 year olds and 18-21 year olds. This would allow analysis of any differences between those for who it is legal to purchase drinks and younger age groups. The pre-wave results have been re-analysed to enable comparison between the two sets of data.

Research note 4: Ready-to-drink beverages (RTDs) or alcopops as they are more commonly known are referenced extensively throughout this report. These drinks or brands will be referred to as alcopops from this point forward.

Research note 5: As mentioned in research note 1, due to the multi-faceted relationship between young people and alcohol, this research can only go so far in understanding the impact of regulatory change.

The appeal of individual advertisements and the factors that drive appeal can be tested and to some extent compared. However it is important to note that the alcohol advertising market now is different to that researched in 2005. There is considerably less exposure to alcohol advertising on television amongst young people in 2007 compared with 2005 and the types of product being advertised are markedly different – so the pre and post wave studies are not directly comparable.

Since 2005 there have been a number of changes in the cultural landscape and the alcohol marketplace. It will be extremely difficult to untangle the impact of these changes on young people's attitudes and behaviour towards both alcohol and alcohol advertising. However it is important to acknowledge that these changes have taken place.

- In November 2005 there was a change in the licensing laws allowing pubs and bars to stay open later – this change in opening hours prompted a resurgence in the public debate surrounding the effects of alcohol.

- A number of advertising campaigns featuring young people have aired, including a hard hitting drink driving campaign and the Drink Aware commercials.

- In April 2007 a campaign was launched by the English charity, Alcohol Concern, to promote the prosecution of parents who give alcohol to young people under the age of 15.

- There have been changes in the type of drinks that are popular; most notably there has been a 23% rise in the consumption of cider (as reported by the BBC on 9th April 2007).

- There have been promotions for lighter, fruit based drinks such as Quinns (now discontinued) as well as the marketing of lighter versions of traditional brands such as SoCo Lime and Fosters Twist.

- There have been changes in marketing in general as well as for alcoholic drinks – particularly marketing via the internet and websites such as MySpace and YouTube, where young people can view advertising from around the world.

It will be crucial to take these changes and others into account when looking at changes in young people's attitudes to alcohol and alcohol advertising identified in 2007. This means that although it can be argued that some of the changes identified may be a result of the changes in regulation relating to alcohol advertising we cannot prove this conclusively.

Section 3

The context: young people and drinking

Before we go on to examine the issue of appeal, in this section we look at the context in which young people's attitudes to alcohol advertising needs to be framed, particularly their relationship with alcohol and their drinking behaviour.

Key findings

- The research has identified a number of changes in reported drinking behaviour between the pre and post waves of research:
    - Based on our survey the proportion of 11-13 year olds who have never drunk alcohol has increased from 31% in 2005 to 46% in 2007. This is consistent with the findings of the 2007 Home Office report[7] which found there has been an increase in the proportion of 11-15 year olds who claim never to have drunk alcohol.
    - Alcopops have declined in popularity – when asked about the brands of alcohol that they drink mentions of alcopops overall have dropped from 69% to 58%. This is particularly the case for those aged 14 or over.
    - In line with general fashions in alcohol consumption, there has been an increase in the amount of cider that young people report drinking. This is particularly the case among 14-17 and 18-21 year olds – three in ten young people from both these groups have drunk cider in the last six months (compared to 14% and 11% respectively in 2005).
    - According to this study, there has been no change in the proportion of under 11-17 year olds saying they regularly drink to get drunk between the two waves of research. The age at which it is most common for young people to report regularly drinking to get drunk is now 20 and 21 years old and there has been a significant fall in the proportion of 18-19 year olds regularly drinking to get drunk.
- These key changes appear to indicate some shifts in young people's drinking behaviour that can potentially be seen as positive – particularly the later age at which young people start drinking. However, in the context of alcohol advertising and the changes in regulation surrounding this it is not possible to conclusively link these changes. It is possible and indeed probable that changes to the style and content of alcohol advertisements have affected their appeal amongst young people, but it is extremely difficult, if not impossible to extricate this impact from all the other influences on young people's drinking behaviour – particularly changes in the cultural and marketing landscape.

[7] HM Government (June 2007) *Safe. Sensible. Social. The next steps in the National Alcohol Strategy*. http://www.homeoffice.gov.uk/documents/Alcohol-strategy.pdf?view=Binary

- The past two years have seen changes in the licensing laws, to allow pubs and bars to stay open later along with public debates surrounding the effects of alcohol and high profile campaigns about drink driving and the 'Drink Aware' commercials aimed at young people. There have also been changes in the alcohol market or 'fashions' – such as the increase in the consumption of cider and the launch of some lighter, more fruit based drinks such as Fosters Twist, SoCo Lime and Quinns (now discontinued).

Drinking Behaviour

Note: Although much of the discussion in this section is about the development of young people as 'drinkers' (79% of the total sample in age group 11−21 years in the quantitative research have 'ever tried' alcohol), many of the young people in the research (particularly those aged 11−13) do not drink or do not drink with any degree of regularity. For example, when looking at 11-13 year olds in isolation, 46% claim never to have tried alcohol, 47% have tried it once or twice or only have a drink on special occasions such as birthdays and Christmas (in many of these instances this would be with the permission of their parents/guardians) and 3% claim to have a drink two or three times a month. The remaining 3% claim they are regular drinkers (at least once a week or more often).

The 2005 qualitative research looked into young people's attitudes to drinking and drinking behaviour in detail. This detailed investigation was not repeated in 2007 but from warm-up discussions with young people, there appears to be little change in young people's general attitudes towards drinking and particularly how they "learn" to drink.

The semiotic study and discourse analysis in 2005 showed that drinking alcohol is one rite-of-passage into adulthood and provides an opportunity for young people to develop different identities and express themselves.

"Drinking is what you do, everybody does it. You start to change when you're a teenager and I think I'm still changing from what I used to do couple of years ago"
Male, 16-17, Manchester, 2007 post-wave

"It's what you do when you're growing up. Everybody sneaks around their parents trying new stuff with their mates. I did it when I was younger, you try smoking and drinking and smoking bud. It's one of those things you do when you're young 'cos it's cool, everyone's doing it."
Male, 18−21, Belfast, 2005 pre-wave

Learning to drink: 'the apprenticeship of drinking'

Qualitatively, it was discussed and acknowledged that there are good and bad ways of drinking and learning to become a drinker. There exists a kind of drinking apprenticeship whereby individuals (or groups) progress from being novice/naïve drinkers to more sophisticated, knowledgeable (adult) drinkers. The discourse analysis conducted in 2005 indicated that young people are keen to present themselves as having achieved the status of 'drinker'. A 'drinker' is someone who knows both their own limitations, and how to manage themselves while drunk, demonstrating their competence through their

experience. However, they feel they have the right to get drunk and therefore be in control of when they want to be *out* of control.

Therefore becoming a 'proper' drinker can be characterised as an apprenticeship, as a practice that is learnt. However, it is a practice that needs to be 'secret' as the inability to manage their own drinking behaviour is scorned upon by their peers. This concept was recurring throughout the discussion groups.

"You see so many kids knocking drinks back, they're only like 12. Maybe I did that when I was their age. But now it's like you know how to handle it bit better. I still get pissed as often as I can but like it doesn't have to be all the time. I can get pissed when I want to get pissed."
Male, 16-17, London, 2007 post-wave

"It's, like, inexperienced drinking… like youth discos, but everyone's drunk. They're not really drunk, they've had just a couple and they're, like, 'whoa, I'm pissed."
Female, 16−17, West Country, 2005 pre-wave

The desire to 'get drunk in a hurry' is another attitude that differentiates the naïve drinker from the 'proper' drinker and often distinguishes young people from adults. By moving away from this need to get drunk quickly, young people can show that they have graduated to 'adult' drinking. The rules of drinking are learned through drinking experiences and observations, therefore young people undergo a 'secret apprenticeship', negotiating the path from their naïve status to the end-stage of a 'drinker'. As young people progress through the secret apprenticeship they tend to appreciate different types of drinking environments. For instance, they aspire to both glamorous clubs and parties as well as a relaxing environment where they can have fun with their friends. In the 2007 qualitative discussions this aspect emerged strongly.

"You want to know you've had a good night out, been on form. It's also the music, the atmosphere, the girls. Sometimes you just can't remember a thing and that's bad when people are telling you the next day what you did."
Male, 16-17, London, 2007 post-wave

Societal attitudes favouring the consumption of alcohol and developmental aspects inherent in being a teenager mean that this discourse is unlikely to change suddenly, irrespective of a change in alcohol advertising regulations.

Drinking Patterns

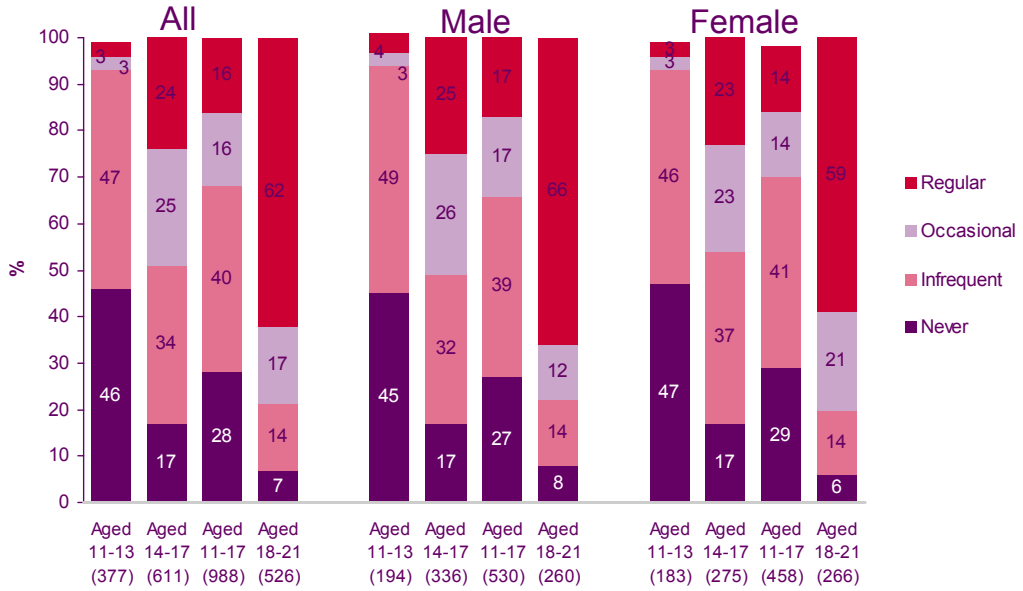
This section looks at young people's drinking behaviour – particularly how often they drink alcohol, where they drink alcohol, what they drink and the extent to which they are drinking to get drunk.

Alcohol consumption patterns

The responses to a scale question in the Ipsos MORI quantitative survey were used to group young people into the following drinking classifications:

Never	I have never drunk alcohol
Infrequent drinkers	I have only tried alcohol once or twice/I have an alcoholic drink on special occasions such as birthdays, Christmas or New Year
Occasional drinker	I sometimes have an alcoholic drink but no more than two or three times a month
Regular drinkers	I have an alcoholic drink once or twice a week/I have an alcoholic drink three or four times a week/I have an alcoholic drink every day

Figure 1 Alcohol consumption profile: Male vs female



Q. Which of these best describes you?
Base: All males and females (actual base shown in brackets). Those saying 'don't know' are not shown.
Source: Ipsos MORI 2007 study

The overwhelming majority of 11–13 year olds fall into the never/infrequent drinkers categories - 46% have never drunk alcohol and almost half are classified as infrequent drinkers (those who have tried alcohol once or twice or only drink alcohol on special occasions such as birthdays or Christmas). This is the case for both males and females. A small proportion of 11-13 year olds fall into the regular drinker category – 4% of males and 2% of females.

The proportion of 11–13 year olds who have never drunk alcohol has increased from 31% in the benchmarking study to 46% in the post-wave study; this applies to both males and females. This suggests that young people in 2007 are starting to drink alcohol at a slightly older age. The Home Office report, '*Safe. Sensible. Social. The next steps in the National Alcohol Strategy'* published in 2007 reported similar findings.

According to the report since 2001 the proportion of young people aged 11-15 who say they have never drunk alcohol has gone up from 38% to 46%.

There has been less change in behaviour amongst the 14–17 age group. Amongst this age group, half fall into the occasional (25%) and regular (24%) drinker classifications – signalling young people's entry into the secret apprenticeship of drinking. There is little difference in drinking behaviour between males and females in this age group. There remains a group of 14–17 year olds who have never drunk alcohol (17%, similar to the finding of 14% in 2005). The qualitative research in 2005 found that for some young people, not drinking was as much of a defining characteristic as becoming a drinker.

As would be expected, once young people reach the age of 18 there is a significant increase in the proportion of regular drinkers and a corresponding fall in those who have never drunk alcohol or drink infrequently. However, 18-21 year old males are more likely to report drinking either three or four times a week (25% compared to 16%) or everyday (7% compared to 2%) than females. As in 2005, the proportion of those over the legal alcohol purchasing age who have never drunk alcohol is low.

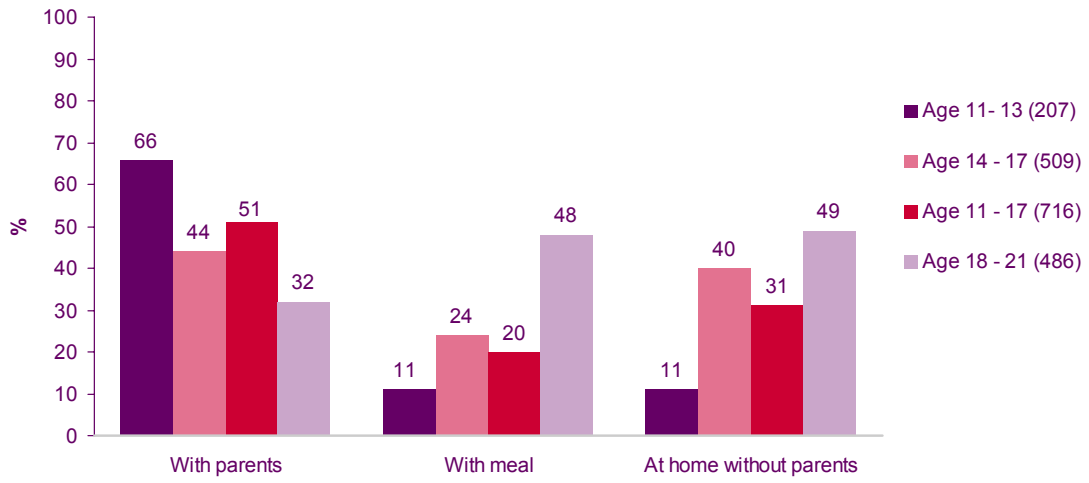
Ethnicity also appears to have an impact on the propensity of young people to drink alcohol – 51% of young people from an ethnic minority background[8] report never having drunk alcohol, substantially higher than for young people from a white background (15%).

Drinking locations

Young people were asked about where they had drunk alcohol in the last six months. Amongst those aged 11–13 years who have drunk alcohol, most are likely to report drinking with their parents (66%) or with a meal (11%), continuing the trend that drinking amongst the youngest age group is usually moderate and likely to be supervised by parents/guardians. They are much less likely to mention drinking alcohol in locations where they are unsupervised by a parent or adult - drinking at home without parents is the most common (11%) followed by a public place (6%), a party (4%) or in a pub, bar or club (3%). This is largely the same picture as in 2005 – although the proportion of 11-13 year olds drinking alcohol with a meal has declined in 2007 to 11% compared to 21% in 2005.

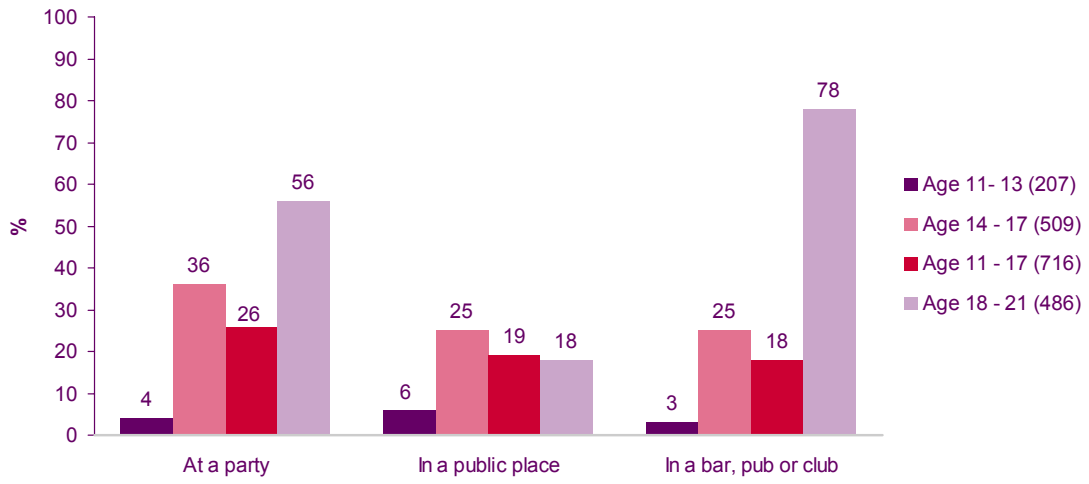
[8] No quotas were set on ethnicity at the fieldwork stage so this is not a nationally representative sample of young people from ethnic minority backgrounds, however the difference is sufficiently large to suggest it is a real one

Figure 2 Drinking locations by age group



Q In which, if any of these places or situations have you drunk alcohol in the last six months?
Base: All who have ever drunk alcohol (1,202)
Source: Ipsos MORI 2007 study

Figure 3 Drinking Locations by age group



Q In which, if any of these places or situations have you drunk alcohol in the last six months?
Base: All who have ever drunk alcohol (1,202)
Source: Ipsos MORI 2007 study

The data illustrates how the locations in which young people drink start to change between the 11-13 and 14-17 age groups. Although 44% of 14-17 year olds still mention drinking with parents and this remains the most mentioned, situations where they are not

supervised by a parent or adult become more common than for younger age groups. They are more likely than 11-13 year olds to be drinking alcohol at home when parents are out (40%), at a party (36%) or in a public place (25%), and despite all of this group being under the legal alcohol purchasing age, a quarter report drinking in a pub, bar or club. Differences begin to emerge between the genders at this stage – males are more likely to mention drinking in a public place than females (31% of males compared to 18% of 14-17 year old females). The lower incidence of females drinking in public places could be a result of easier access to alcohol for those in this age group – qualitative discussions suggested young females are more able than males of the same age to 'look older' using clothes and make-up and are likely to spend time with older boys.

"I've got an older sister and she drinks. We go out drinking to a bar. Sometimes I go drinking with her friends too."
Female, 14-15, Manchester, 2007 post-wave

"We drink wherever we can really. Could be anywhere. Just get some cans or a bottle and sit in the park with some mates."
Male, 14-15, Scotland, 2007 post-wave

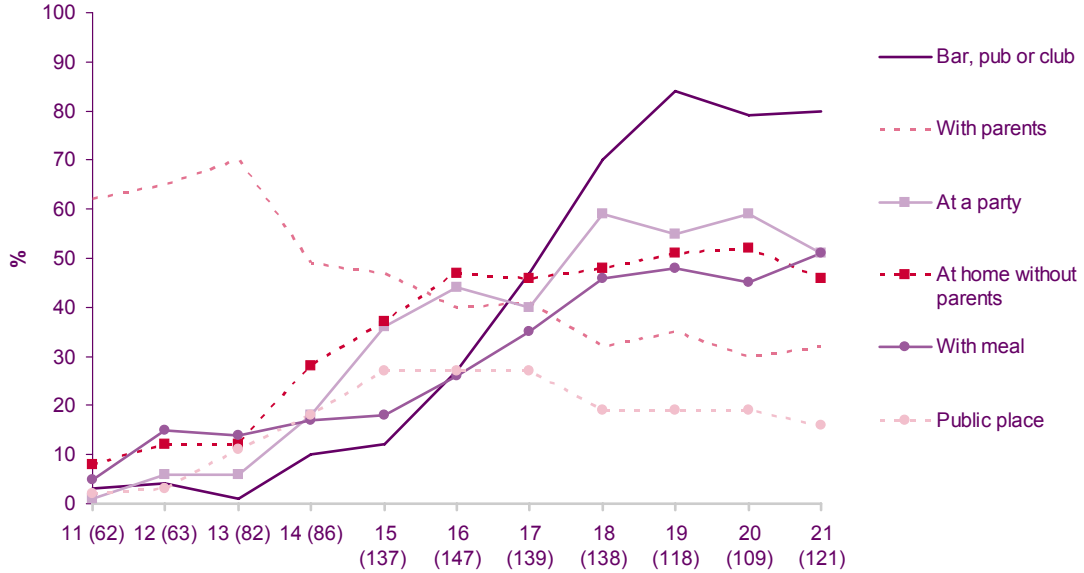
"We go to parties and sometimes to a club. We usually go with some guys we know."
Female, 14−15, Midlands, 2005 pre-wave

"They're mostly older guys who we go with, though. Boys our age, we don't really see them at clubs and stuff."
Female, 14−15, Midlands, 2005 pre-wave

This is a largely similar picture to the benchmark study, although young people in this age group now seem to be a little less likely to be drinking at a party (36% in 2007 compared with 46% in 2005).

Once young people reach the age of 18, the incidence of drinking in bars, pubs and clubs increases dramatically (78% amongst 18-21 year olds) to become the most popular drinking venue. Drinking at a party (56%), at home without parents (49%) and with a meal (48%) are all also more popular among 18-21 year olds than the other age groups. As there is no longer a need to be secretive about drinking at this age, 18–21 year olds are less likely to drink in a public place (18%) and are less likely to be drinking with parents (32%). One in five (21%) 18-21 year olds have drunk alcohol on their own in the last six months. Young men are more likely than young women to say that they have drunk alcohol on their own (28% of males compared to 14% of females). In contrast young women are more likely to have drunk alcohol with a meal (55% compared to 39%). There has been almost no change in drinking locations amongst this age group since the benchmark study.

Figure 4 Drinking locations by age



Q In which, if any of these places or situations have you drunk alcohol in the last six months?
Base: All who have ever drunk alcohol (1,202)
Source: Ipsos MORI 2007 study

There are some variations in drinking locations based on social class – young people from the highest social class (AB) are more likely to drink in more supervised environments. More than half (54%) of young people in this social group drink alcohol with their parents (compared to 35% from social class DE) and two in five drink alcohol with a meal (compared to 20% from social class DE).

Types of alcohol consumed

Since 2005, we have seen changes in the kinds of drinks young people are consuming. Young people are drinking alcohol of all types but beer (the most mentioned type of drink amongst all age groups) and alcopops (skewed towards female drinkers) are particularly popular. In particular contrast to 2005, there has been an increase in the consumption of cider, especially amongst the 14-17 and 18–21 age groups – three in ten young people from both of these groups have drunk cider in the last six months (compared to 14% and 11% respectively in 2005). There has also been a shift away from drinking alcopops down from 69% overall in 2005 to 58% in 2007 – this is particularly so for the 11-13 age group (although alcopops still remain more popular with females than males).

Table 2 highlights the changes in the kinds of drinks consumed between the two stages of research - the chart below focuses on beer, alcopops and cider as these are the categories with the highest level of consumption.

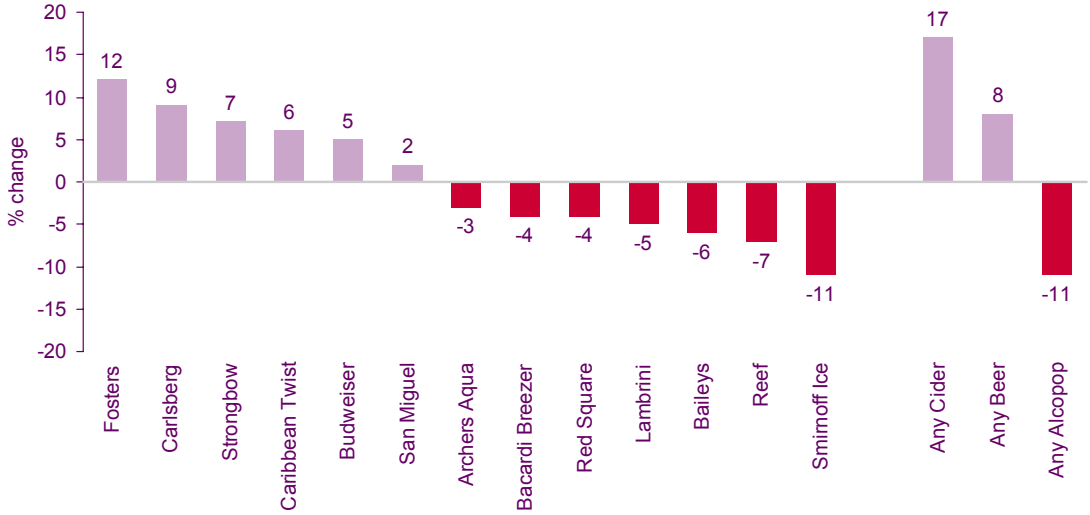
Table 2 Alcohol consumption by category: 2005 vs 2007

Ages	11-13 2005	11-13 2007	14-17 2005	14-17 2007	11-17 2005	11-17 2007	18-21 2005	18-21 2007
Bases: All who have had a drink in the last six months	(246)	(176)	(517)	(483)	(763)	(659)	(481)	(473)
Any beer	38%	47%	55%	65%	49%	60%	67%	71%
Any alcopop	53%	37%	76%	62%	68%	55%	69%	61%
Any cider	3%	9%	14%	30%	10%	24%	11%	31%

Q And which of these brands of alcoholic drink, if any, have you drunk in the last six months?
Base: All who have had a drink in the last six months 2005 (1,224), 2007 (1,132)
Source: Ipsos MORI 2005 and 2007 studies

On a brand level, Fosters is the most popular drink – it was mentioned by a third of young people (35%) and has grown in popularity since 2005. This is followed by WKD (35%) and Carling (32%). Smirnoff Ice, the most popular drink in 2005, has fallen to seventh place in 2007, mentioned by a quarter of young people (compared to 36% in 2005).

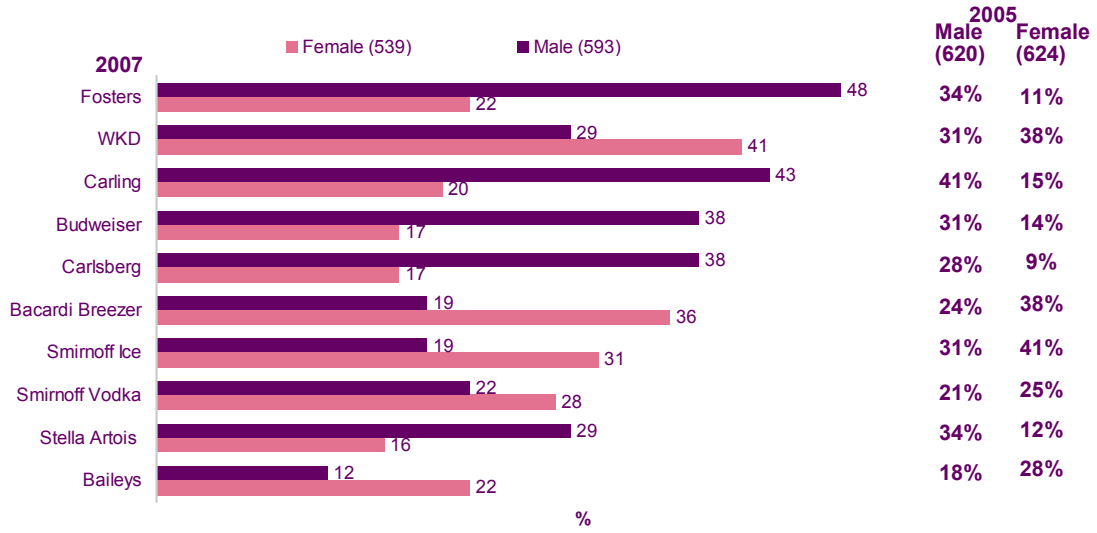
Figure 5 Brands drunk: significant changes 2005-2007



Q And which of these brands of alcoholic drink, if any, have you drunk in the last six months?
Base: All who have had a drink in the last six months 2005 (1,224), 2007 (1,132)
Source: Ipsos MORI 2005 and 2007 studies

It is also interesting to look at the differences in the popularity of particular brands at a gender level as illustrated in Figure 6. Beers tend to be more popular amongst young males and alcopops more popular with female drinkers.

Figure 6 Brands drunk in the last six months, 2005 vs 2007



Q And which of these brands of alcoholic drink, if any, have you drunk in the last six months?
Base: All who have had a drink in the last six months 2005 (1,244), 2007 (1,132)
Source: Ipsos MORI 2005 and 2007 studies

Types of alcohol consumed - Males

Carling is the most popular brand amongst **11–13 year old males in 2007** - 20% of those who have had a drink in the last six months report drinking Carling. Other popular brands with this age group are WKD (13%), Fosters (13%) and Bacardi Breezer (12%). As would be expected with this age group who are in the very early stages of drinking, the range of drinks they mention is fairly limited.

In line with the overall results, Fosters is the most popular brand amongst **14–17 year old** males (49%), followed by a range of other beers – Carling (43%), Budweiser (39%), Carlsberg (32%), Stella Artois (26%) and the alcopop, WKD (31%). The next most mentioned alcopop is Bacardi Breezer at 23% which is equal to the proportion drinking Strongbow (23% - up from 16% in 2005). This reflects the upward trend in the incidence of young people drinking cider – as referred to earlier.

Fosters is also the most popular drink amongst males **aged 18-21** (61%), with reported consumption increasing considerably amongst this age group since 2005 (46%). Again the list of other popular brands is largely dominated by beers – Carlsberg (56%), Carling (51%), Budweiser (50%), Stella Artois (41%). The two major alcopop brands come lower down the list – WKD (32%) and Smirnoff Ice (23%). As with the overall results, Smirnoff Ice in particular has decreased amongst this age group (down from 37% in 2005). Cider has also gained a footing in this age group - 28% of 18-21 year old males have drunk Magners in the last six months (a new brand to the market since the 2005 research) and 20% Strongbow (compared to 15% in 2005 – a slight but not significant increase).

Types of alcohol consumed - Females

WKD is the most popular brand amongst **11-13 year old females** (27% of those who have had a drink in the last six months report drinking WKD), followed by Bacardi Breezer (24%) and Smirnoff Ice (19%), illustrating the continuing popularity of alcopops amongst this group. Other brands popular with this group are Lambrini (20%), Fosters (13%) and Blossom Hill wine (12%).

For **14-17 year old** females, WKD is again the leading brand (49%) and other alcopops are also popular – Bacardi Breezer (40%), Smirnoff Ice (34% a significant decline from 47% in 2005) and Caribbean Twist (17%). However it is between these ages that females start to experiment more and we see other brands entering the list, particularly spirits such as Smirnoff Vodka (24%), Baileys (20%) and Malibu (20%). Lambrini (24%) and Fosters (23%) also retain their appeal. Although it does not feature as one of their top mentions, Strongbow has seen a considerable increase in consumption amongst this group, mentioned by 18% in 2007 compared to just 8% in 2005. These brands cover a much wider range of drinks categories than those mentioned by males in the same age group.

Smirnoff Vodka and WKD are the brands drunk most amongst **18–21 year old females** (both mentioned by 41%) – illustrating the two most popular types of drinks amongst this group, spirits and alcopops. Wine is also popular amongst this group with almost two in five (37%) having drunk Blossom Hill in the last six months. Other popular brands include Bacardi Breezer (37%), Smirnoff Ice (34%), Baileys (30%), Malibu (23%) and Vodka Kick (22%). Two beer brands are also mentioned by this group – Carling and Fosters (both mentioned by a quarter). Although the increase in cider drinking seen across other groups is not as apparent amongst young women in this age group, 16% have drunk Magners in the last six months and there has been a substantial increase in those drinking Strongbow up from 4% to 14% in 2007.

Table 3 Brands drunk by age and gender

	Total	Males				Females			
Age		11-13	14-17	11-17	18-21	11-13	14-17	11-17	18-21
Base: All who have drunk in the last six months	(1,132)	(86)	(274)	(360)	(233)	(90)	(209)	(299)	(240)
	%	%	%	%	%	%	%	%	%
Fosters	35	13	49	40	61	13	23	20	25
WKD	35	13	31	27	32	27	49	41	41
Carling	32	20	43	37	51	6	21	16	25
Budweiser	28	6	39	31	50	8	16	14	21
Carlsberg	28	11	32	27	56	3	19	13	20
Bacardi Breezer	27	12	23	21	17	24	40	35	37
Smirnoff Ice	25	6	21	17	23	19	34	30	34
Smirnoff Vodka	25	4	20	15	33	3	24	17	41
Stella Artois	23	11	26	22	41	6	16	13	19
Baileys	17	2	11	9	18	7	20	16	30
Strongbow	17	7	23	19	20	4	18	14	14
Magners	16	4	18	14	28	3	14	11	16
Blossom Hill	14	3	4	3	12	12	10	11	37
Lambrini	14	8	13	12	6	20	24	23	15
VK (Vodka Kick)	13	1	11	9	14	10	13	12	22
Malibu	13	1	8	6	9	4	20	15	23
Reef	12	3	9	7	8	7	17	14	20
Grolsch	12	8	15	13	24	2	7	5	6
Fosters Twist	11	4	11	10	22	5	10	8	9
Guinness	11	8	15	13	21	1	7	5	6
Heineken	11	5	14	12	24	2	3	2	6
Archers Aqua	10	2	8	6	5	3	12	9	22
Bacardi Rum	10	1	11	9	8	1	9	7	18
Red Square	10	3	11	9	8	6	11	10	14
Caribbean Twist	10	3	5	4	8	3	17	13	17
Kronenbourg	9	1	9	7	23	1	4	3	4
Bulmers	8	4	9	8	16	0	6	4	8
Southern Comfort	8	0	7	5	14	2	3	2	13
San Miguel	7	7	7	7	15	1	4	3	6
Cobra	5	2	7	6	11	1	1	1	4
Vodkat	5	1	4	3	5	6	7	7	7
John Smiths	5	5	5	5	11	3	3	3	*
Quinns	4	0	1	1	3	0	3	2	9
Dooleys	3	1	3	2	4	0	3	2	5
Coors light	3	0	3	2	7	0	1	1	1
Any Beer	64	58	79	74	89	38	46	43	54
Any Alcopop	58	28	52	46	51	47	76	67	71
Any Cider	27	12	32	27	36	7	28	21	26

Source: Ipsos MORI 2007 quantitative study (Respondents were asked to state which brands they had consumed in the last six months by choosing from a pre-coded list and stating any brands they had consumed which were not mentioned).

Motivations to drink: the appeal of alcohol amongst young people

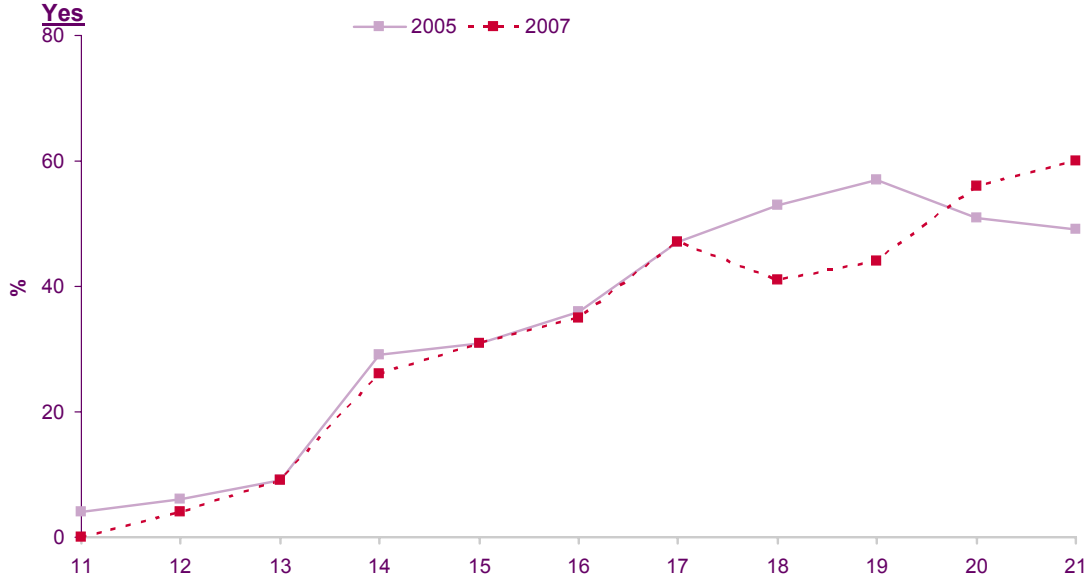
While young people drink alcohol for a range of reasons, the qualitative research both in 2005 and the post-wave in 2007, identified that the 'buzz' of getting drunk and the boost in confidence are important reasons to drink alcohol.

Drinking to get drunk also relates to frequency of drinking – those who report drinking once or twice a week are most likely to drink regularly to get drunk (49%) and of those who drink three or four times a week 25% say they regularly drink to get drunk.

As would be expected given the frequency with which young people drink, the proportion of young people who regularly drink to get drunk increases with age – indeed those most likely to regularly drink alcohol with the aim of getting drunk are those aged 20 and 21 years of age (56% and 60% respectively) and the incidence of drinking to get drunk amongst 11-13 year olds is very low. However, based on the findings of this study, there has been little change in the proportion of 11-17 year olds saying they regularly drink to get drunk between the two waves of research

The 2005 benchmark study found that young people aged 18–19 were most likely to regularly drink to get drunk and this levelled off for those in their early twenties. In 2007 those aged 18-19 are significantly less likely to report drinking to get drunk and the focus has shifted to those aged 20 -21.

Figure 7 Regularly drinking to get drunk: 2005 vs 2007



Q Do you and your friends regularly drink alcohol to get drunk?-Yes
Base: All who have had a drink in last six months 2005 (1,244), 2007(1,132)
Source: Ipsos MORI 2005 and 2007 study

The discourse analysis in 2005 showed that young people in the older age groups who consider themselves experienced drinkers feel it is their right to drink to get drunk and *not* be in control. Deciding when to get drunk is at their discretion, compared with 'naïve' drinkers who they feel are always out of control when they drink. In 2007 the quantitative

research suggests that young people at the top age range are continuing to regularly drink to get drunk. Only a small proportion of 11–13 year olds report regularly drinking to get drunk (5%), this increases amongst the 14–17 year old age group to three in ten (31%) and increases further amongst those aged 18 and over (50%). There is little difference between the genders in any of the age groups.

The 2005 quantitative data identified that parental drinking behaviour has an influence on the propensity to drink to get drunk. Young people who perceived that their parents drank frequently were more likely to say that they themselves got drunk regularly. Conversely those who perceived their parents to be infrequent drinkers were less likely to report getting drunk themselves (32% compared to 18%). This suggests the indirect influence of parental drinking behaviour on young people.

Appeal of drinking – 2005 benchmark study

The 2005 benchmark study looked in detail at the appeal of drinking and levels of information about drinking. This was not repeated in 2007 but the data is still an important insight into young people's attitudes towards alcohol and drinking.

In both the 2005 and 2007 qualitative discussion groups, young people talked about how alcohol masks insecurities and gives them the 'life of the party' persona to which they aspire. Drinking environments (parties, pubs, clubs and parks) provide a way for young people to interact with their peers with the added confidence that drinking alcohol brings.

"Alcohol is great. You just feel yourself floating and nothing can touch you."
Female, 16-17, Manchester, 2007 post-wave

"Every time you get some drinks out everyone's happy. Everyone just needs to relax. We got other things to help you relax too but couple of beers is good to get you going."
Male, 16-17, London, 2007 post-wave

"It's about letting yourself go. Alcohol makes you feel like you can talk to anyone and be anyone you want."
Female, 16−17, Midlands, 2005 pre-wave

"I think drinking is great fun. I love drinking with my mates and trying new stuff."
Male, 14−15, Wales, 2005 pre-wave

To young people, drinking alcohol provides access to an adult-like lifestyle.

"When I started drinking, I really felt like I was doing something cool and grown-up. I felt like I'd finally grown up and I didn't really like the taste, but it felt good to be doing it."
Female, 14−15, Midlands, 2005

These attitudes towards drinking alcohol were explored quantitatively in 2005 by asking participants to express the extent to which they agreed or disagreed with a series of statements relating to the effects of alcohol[9] (Table 4).

Table 4 Agreement with statements about the effects of drinking alcohol

Ages	Total sample	11-13	14-17	11-17	18-21
% strongly agree/tend to agree	(1,298)	(267)	(544)	(811)	(487)
I feel more confident when I've had a drink	51%	16%	53%	41%	68%
I have more fun when I am drunk	45%	15%	45%	35%	62%
I find it easier to chat someone up when I've had a drink	45%	14%	46%	35%	60%

Base: All who have ever drunk alcohol
Source: Ipsos MORI 2005 study

Personal experiences of alcohol differed by age group. Relatively few of the 11-13 year olds claimed that they had more fun when drunk (15%), said that they find it easier to chat someone up (14%) or that they felt more confident (16%). However between 45%-53% of 14-17 year olds agreed with these statements and between 60%-68% of the 18-21 year olds concurred. It should be borne in mind when interpreting these figures that these statements will have different relevance to each of the age groups because their motivations and experiences are different at different stages of development. For example, 'chatting people up when they have had a drink' may be less relevant to a 13 year old than to an 18 year old.

Agreement with all of these statements was considerably higher amongst those who claimed they regularly drink alcohol to get drunk. Amongst this group, 75% said they 'have more fun' when they are drunk; 80% said they 'feel more confident'; and 74% that they 'find it easier to chat someone up'.

Perception of danger and risk: the negative effects of alcohol

Short-term dangers and risk taking

Young people in the 2005 qualitative discussions acknowledged that drinking also has a downside. They recognised that drinking can lead to unpleasant and dangerous consequences.

"You start off feeling really cool and good, chatting up everyone and then you wake up, or you got into a fight and you just don't know how it's going to turn out."
Male, 18−21, London, 2005 pre-wave

[9] Responses were recorded by self-completion. Those who had never drunk alcohol were excluded from answering and as such, the base for these findings is all those who have ever drunk alcohol.

"We drink some Bud then smoke some bud and you having a good time out, but, like, all of a sudden, girls get really stupid and start screaming and you always get in a fight."
Male, 16−17, Manchester, 2005 pre-wave

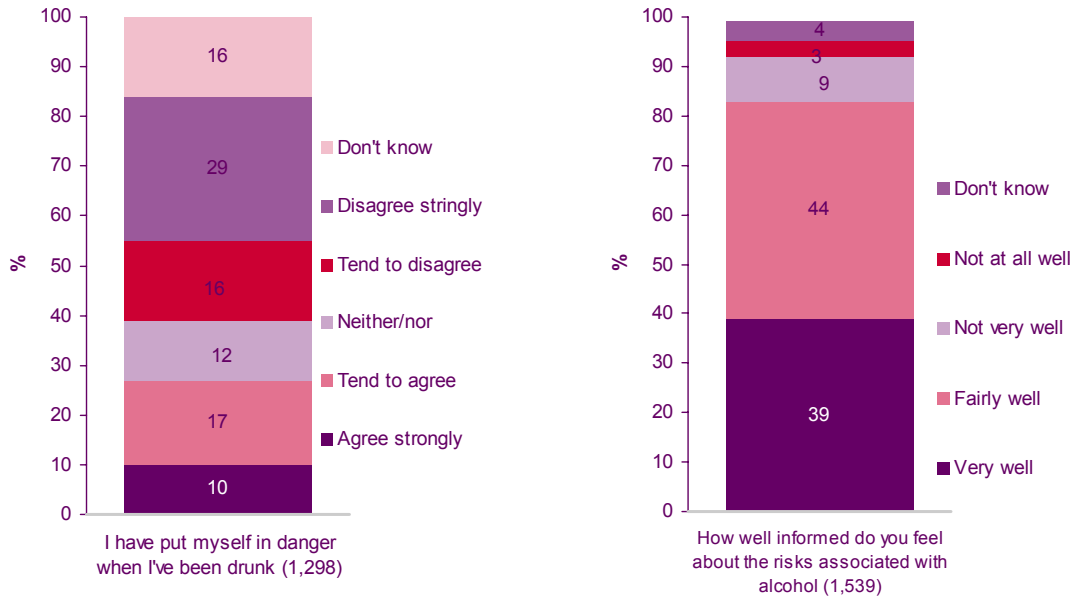
The initial thrill of the drinking and being drunk can reduce awareness of responsibility and outweigh the consequences at that time.

"Who cares anyway, you're having a good time."
Male, 18−21, London, 2005 pre-wave

"Sometimes, you wake up the next morning and you feel really bad and you can't remember what you did, you just hope you didn't totally lose it and be sick in front of people."
Female, 16−17, Midlands, 2005 pre-wave

The 2005 survey indicated that 27% of young people who had tried alcohol strongly agreed or tended to agree that they have put themselves in danger, whilst 45% strongly disagreed or tended to disagree with this (Figure 8). The agreement among young people who said that they 'have put themselves in danger' when they have been drunk increased with age (11% of 11-13 year olds, 25% of 14-17 year olds and 37% of 18- 21 year olds who had tried alcohol said this[10]) and males were more likely to agree that they have put themselves in danger when drunk than females (30% vs 24%). 42% of those who said they regularly drink to get drunk felt that they have put themselves at risk.

Figure 8 Perceived dangers and risks



Source: Ipsos MORI 2005 study

[10] Bases: Those who have tried alcohol: 11-13 year olds, 267; 14-17 year olds, 544; 18-21 year olds, 487.

Awareness of risks and sources of information

Overall, 84% of all the young people interviewed in 2005 said they felt informed about the risks of drinking alcohol, with a fairly even split between those feeling 'very well informed' (39%) and those who felt 'fairly well informed' (44%). Those who had tried alcohol felt more informed of the risk than non-drinkers; 85% of those who had tried alcohol said they were either 'very well' or 'fairly well' informed, whereas 76% of non-drinkers said this. Those who said they felt 'very well' or 'fairly well' informed about the risks associated with alcohol, were equally likely to intentionally get drunk as those who felt 'not very well' or 'not at all well' informed. Please note that this analysis was not repeated in 2007 but the data is still an important insight into young people's attitudes towards alcohol and drinking.

The survey also found that young females were more likely to feel informed of the risks associated with alcohol at an earlier age than males. 93% of females in the age group 14−17 years said they felt well informed, compared with 84% of males the same age.

During the qualitative discussions, females were generally more aware and concerned about being vulnerable when drinking and were warned by parents about date-rape and 'spiked' drinks. Magazines for young females were also seen as a source of information.

"My dad always goes on about drinks getting spiked and taking your drink into the toilet with you, don't leave it on a table."
Female, 14−15, Midlands, 2005

"I've seen stuff in magazines about date-rape drugs and stuff in bars or guys getting violent 'cos someone spiked their drink, like in teen mags. But it is there at the back of your head."
Female, 16−17, London, 2005

In the 2005 qualitative research discussions, some participants said they felt there were fewer messages in the media promoting 'responsible' drinking or 'anti-drinking' when compared to anti-smoking messages. Young people discussed the anti-smoking advertisements as being very powerful (dripping fat execution). In 2007, more powerful advertising featuring young people trying to be invincible after drinking alcohol by scaling buildings was mentioned frequently for the cringe-worthy truths it depicted.

"That ad with the kid on the roof and then he falls. It makes you feel sick but it's true though. I've seen people try to do that stuff."
Female, 14-15, London, 2007 post-wave

Drink−driving advertisements, while they were considered powerful, appeared to have less resonance with young people as many do not drive.

"Those drink−driving adverts are pretty shocking. The smoking ones are the worst, makes you feel really sick."
Female, 12−13, Surbiton, 2005 pre-wave

In the 2005 group discussions, young people felt that the messages from their parents about drinking were not always clear or straightforward. For example, drinking may be allowed as long as it is 'responsible'. However, it can be hard to decipher the boundary

between 'responsible' and 'irresponsible drinking'. Parental drinking was not examined in the 2007 post-wave qualitative discussions.

"My mum doesn't want me to get hurt, so she says don't drink too much. But I see them drinking and doing worse, so how can she tell me not to?"
Male, 14−15, Manchester, 2005 pre-wave

A theme in the group discussions was the perception that the effects of alcohol on the body are less immediate and less likely to affect young people than the effects of smoking and other drugs.

"Everyone knows you'll end up drinking, but they are really scared about drugs and smoking. Drinking isn't really that bad."
Female, 14−15, Midlands, 2005 pre-wave

"You don't really hear much about drinking. Anyway, it's not really that bad because we are quite young. You only get your liver damaged after, what, 25 years of drinking. So we've still got loads of time."
Male, 16−17, London, 2005 pre-wave

"The people in the advert seem to be having a good time, so it can't be that bad for you can it?"
Female, 14−16, Scotland, 2005 pre-wave

Post-drinking repercussions

Post-drinking repercussions, such as being ill, having a hangover or the 'morning after' embarrassment of trying to remember what happened the night before, were all familiar to the young people in the discussion groups who drank alcohol. However, these images were rarely at the forefront of mind when they talked about what drinking means to them. The fun, glamour and liberating adult aspects of drinking seemed far more appealing and immediate.

"I got really sick one time after a night out. It was awful. I said I'd never drink again, but that didn't happen."
Female, 16−17, London, 2005, pre-wave

"Sometimes you wake up and you're trying to remember what happened but you just know it was real nice."
Male, 14−15, Manchester, 2005 pre-wave

Section 4

Analysis of advertising trends 2002-2006

As part of the research study conducted prior to the changes to the Advertising Codes a piece of media analysis was carried out to understand trends in the alcohol advertising market. This looked at advertising expenditure across media and the exposure to television advertising in particular. This analysis provided useful context in which we could then examine the appeal of alcohol advertising executions.

As part of the post-regulatory change wave of research, the media analysis has been repeated to understand if the changes made have had any impact on the amount of alcohol advertising taking place and young people's exposure to alcohol advertising on television. This includes looking specifically at:

- Analysis across media to understand if there has been displacement of expenditure away from television to other media

- Analysis by sub-category to understand if specific alcohol product categories have been affected by the changes

The advertising data has been sourced from Nielsen Media and is based on the 'Alcoholic Drinks' sub-category within the 'Drinks' category as classified by Nielsen Media.

Key findings

- Television remains the key advertising medium for alcohol advertisers representing an above average share of media spend in 2006 – 49.1% of total alcohol media spend compared with 43.2% of total UK advertising spend. However, television's share of total alcohol media spend has been in steady decline (down from 65.1% in 2002 to 49.1% in 2006) as outdoor, press and radio account for a growing proportion of spend.

- Total alcoholic drinks advertising spend fell £27m between 2005 and 2006 driven by a £26m fall in television expenditure. Television advertising spend within the alcoholic drinks category fell 21.1%(2005-6) compared with a 6.0% decline in total UK television advertising expenditure. This decline in television advertising has driven the overall fall in alcoholic drinks media spend (-12.0% between 2005 and 2006). In comparison alcoholic drinks advertising spend on outdoor and radio grew at an above-average rate.

- Lager brands continue to dominate alcohol advertising, accounting for 34.0% of total media spend in 2006. The greatest shifts in spend have been across the cider market which increased its share of total alcohol media spend from 1.3% in 2002 to 11.8% in 2006 and a fall in the proportion of total media spend represented by alcopops from 12.8% in 2002 to 4.0% in 2006.

- The proportion of television spend represented by the cider market increased from 1.8% in 2002 to 15.5% in 2006 – over the same period the proportion of alcohol television advertising spend accounted for by alcopop brands fell from 14.0% to 2.3%.

- In volume terms (commercial spots aired), alcohol television advertising increased by 7.4% between 2005 and 2006 driven in the main by increased activity across the cider market. The volume of alcopop advertising fell 67.6% between 2005-2006.

- Despite the increase in commercial spots and in line with the changes in advertising spend there has been an increase in exposure to cider advertising and brands classified by Nielsen Media under the 'alcoholic drinks range' sub-category and a fall in exposure to alcopop advertising.

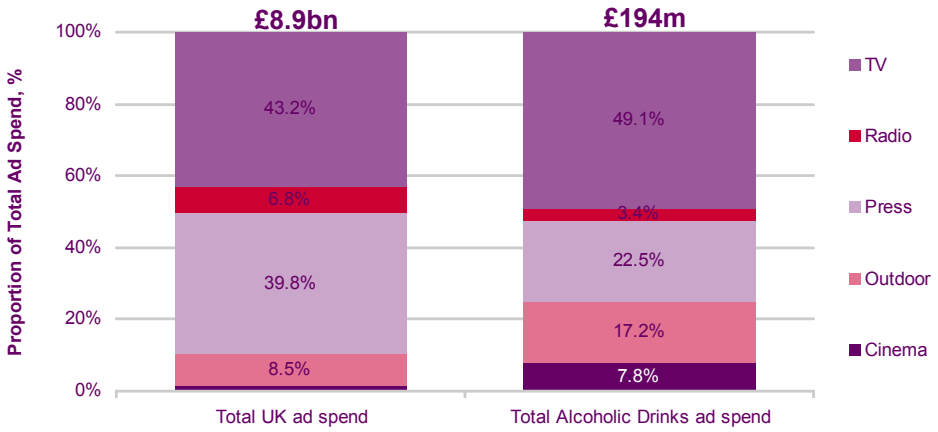
- Overall, children and young adults are being exposed to fewer alcohol commercials on television. There was a 6.0% decline in the alcohol impacts delivered against 16-24 year old adults between 2005 and 2006 and a 15.5% fall in impacts amongst children aged 10-15.

- Compared with 2002, the decline in exposure to alcohol advertising on television is more marked. Between 2002-2006 there has been a decline of 31.1% and 39.0% in 16-24 and 10-15 year olds advertising impacts respectively.

Alcohol Advertising: Total media spend

In 2006, alcohol drinks advertisers spent £194m advertising their products on television, radio, press, outdoor and cinema. As Figure 9 shows, television remains the key advertising medium for alcohol advertisers representing 49.1% of total spend. In comparison, television advertising accounted for 43.2% of the total UK advertising spend in 2006 (£8.9bn).

Figure 9 Advertising expenditure by media, 2006

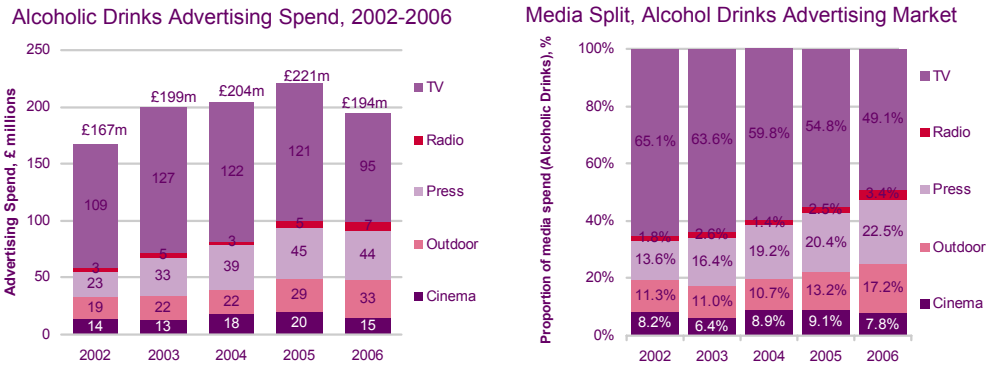


Source: Nielsen Media

Press accounts for 22.5% of alcohol advertising spend – this is below average when compared with total UK advertising spend (press represents 39.8% of total UK media expenditure). Similarly, radio represents a below average share of spend - 3.4% compared with the UK average of 6.8%.

Outdoor and cinema represent 17.2% and 7.8% of alcohol advertising spend respectively – these shares are both above average when compared with total UK advertising spend in 2006 (8.5% outdoor, 1.7% cinema).

Figure 10 Trends in alcohol advertising expenditure, 2002-2006



Source: Nielsen Media

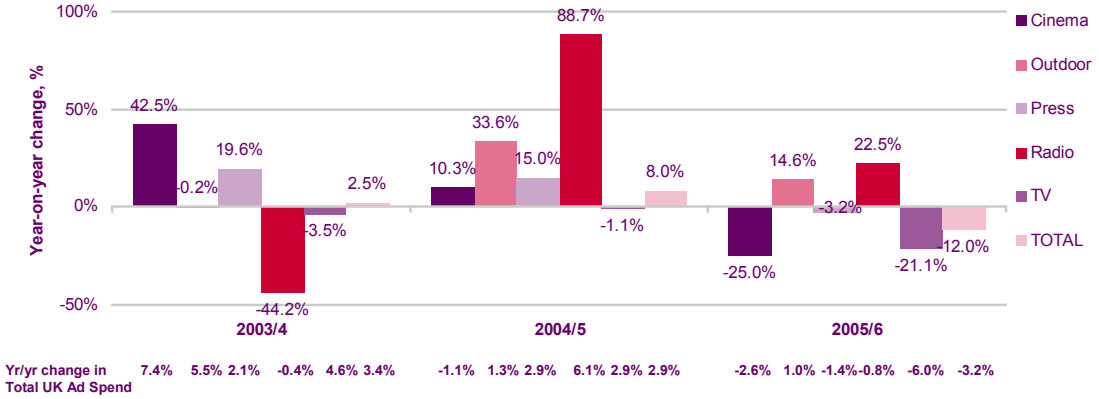
Figure 10 shows total advertising expenditure on alcoholic drinks fell by £27m between 2005 and 2006, driven by a £26m decline in television advertising.

Trend data suggests there has been a move away from television advertising between 2002 and 2006. Television accounted for 65.1% of total alcohol media spend in 2002; this has declined gradually to 49.1% in 2006. Scheduling restrictions with regards to alcohol advertising existed prior to the 2005 Advertising Code changes which concentrated on the creative aspect of alcohol advertising. It could, therefore, be suggested that little or no change to the amount of media activity or the types of products advertised would be expected. It is therefore difficult to estimate how much of this change, if any, is due to the code change or any number of factors such as product lifecycles, product launches, etc.

Over the same period there has been an increase in the proportion of spend allocated to outdoor (up from 11.3% in 2002 to 17.2% in 2006) and press (up from 13.6% in 2002 to 22.5% in 2006) advertising.

Analysis of the year-on-year trends shows that television advertising spend on alcoholic drinks fell by 21.1% between 2005 and 2006 compared with a 6.0% decline in total UK television advertising spend (Figure 11). Overall, advertising spend on alcoholic drinks fell 12.0% between 2005 and 2006 – this was driven primarily by the decline in television activity and to a lesser extent a decline in cinema advertising. In comparison, expenditure on outdoor (up 14.6% between 2005 and 2006) and radio (up 22.5%) grew at an above average rate.

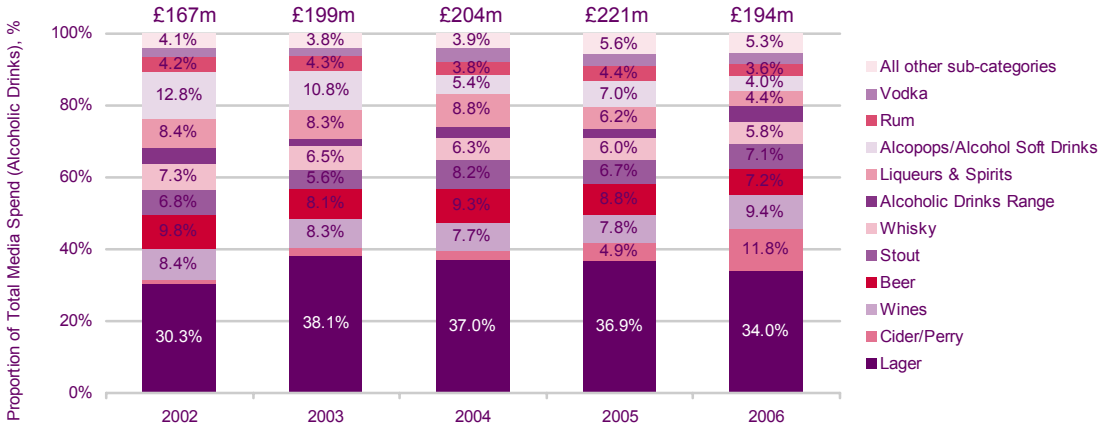
Figure 11 Year-on-year change in alcoholic drinks advertising expenditure



Source: Nielsen Media

A breakdown of total media spend by sub-category shows lager accounted for 34.0% of total alcoholic drinks media spend in 2006 – following an increase between 2002 and 2003 this share has remained fairly steady since 2003 (Figure 12). Two key changes in activity by sub-category have been the increase in cider advertising (representing 11.8% of 2006 media spend compared with 1.3% in 2002) and the fall in the proportion of media spend represented by the alcopops category from 12.8% in 2002 to 4.0% in 2006.

Figure 12 Total media expenditure by sub-category, 2002-2006

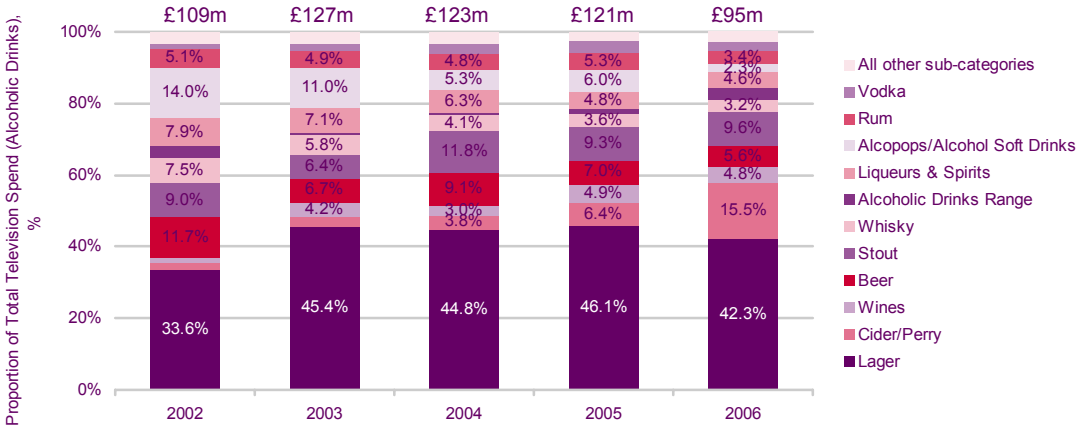


Source: Nielsen Media

Alcohol advertising: Television activity

Analysis of television spend by sub-category shows similar trends. As Figure 13 shows, lager remains the largest sub-category, accounting for 42.3% of television spend in 2006. The proportion of television spend represented by the cider market increased from 1.8% in 2002 to 15.5% in 2006 – over the same period the proportion of alcohol television advertising spend accounted for by alcopop brands fell from 14.0% to 2.3%. Since 2004 the proportions of spend represented by beer, stout and the Nielsen category of 'liqueurs & spirits' have also been in decline.

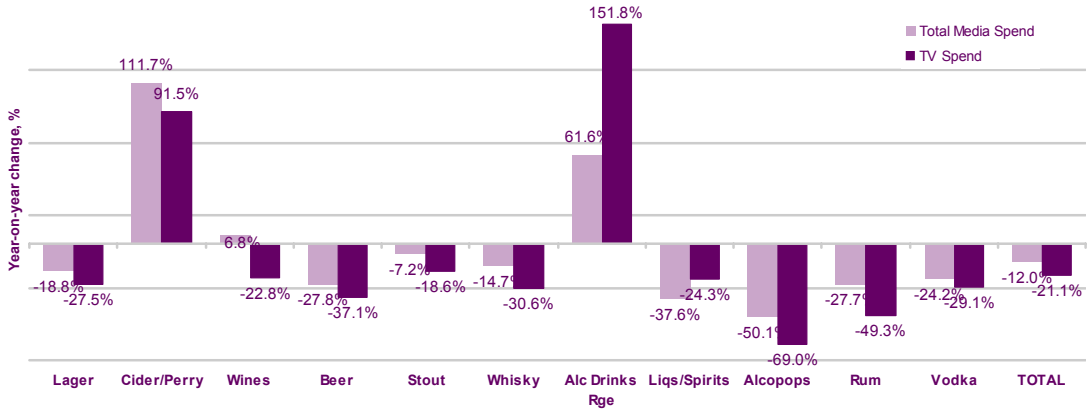
Figure 13 Total television expenditure by sub-category, 2002-2006



Source: Nielsen Media

Total media spend on alcopop brands fell by 50.1% between 2005 and 2006 – television advertising across this sub-category fell by 69.0% over the same period. Advertising of cider and brands classified under the Nielsen sub-category 'alcoholic drinks range' increased dramatically year-on-year. The growth of the cider market was driven by the Magners brand and the Quinns brand accounted for the majority of spend within the 'alcoholic drinks range' sub-category.

Figure 14 Year-on-year change in alcoholic drinks advertising expenditure by sub-category, 2005 vs. 2006



Note: Only the largest sub-categories based on 2006 total media spend are shown
Source: Nielsen Media

Sub-category analysis

As Table 5 shows, the dramatic decline in alcopop advertising was driven by a 69.0% fall in television advertising from £7.2m in 2005 to £2.2m in 2006 and a fall in outdoor spend from £5.2m in 2005 to £2.5m in 2006 (down 51.3%). However, year-on-year there has been an increase in spend on cinema advertising from £1.1m in 2005 to £2.0m in 2006, accounting for over a quarter of all alcopop advertising.

Table 5 Advertising expenditure by medium: Alcopops/alcoholic soft drinks

	2005	2006	% change
Cinema	£1.1m (7.1%)	£2.0m (26.3%)	+86.3%
Outdoor	£5.2m (33.6%)	£2.5m (32.8%)	-51.3%
Press	£1.4m (9.2%)	£0.7m (9.5%)	-48.1%
Radio	£0.5m (3.2%)	£0.2m (2.3%)	-64.9%
TV	£7.2m (46.9%)	£2.2m (29.1%)	-69.0%
Total media	£15.4m (100%)	£7.7m (100%)	-50.1%

Figures in brackets represent proportion of total media spend
Source: Nielsen Media

The advertising activity of the two growth sub-categories, cider and the 'alcoholic drinks range', is summarised in Table 6. Total media spend by cider brands more than doubled year-on-year – this was primarily driven by increases in television spend (from £7.7m to £14.7m) and outdoor activity (up from £1.9m in 2005 to £6.0m in 2006).

The increase in advertising spend by brands in the 'alcoholic drinks range' sub-category was driven by an increase in television spend from £1.3m in 2005 to £3.2m in 2006. Over the same period, press activity also increased with a 37.6% rise in spend.

Table 6 Advertising expenditure by medium: Growth categories

Advertising spend by medium: Cider/Perry

	2005	2006	% change
Cinema			
Outdoor	£1.9m (17.3%)	£6.0m (26.4%)	+223.7%
Press	£0.7m (6.4%)	£1.2m (5.1%)	+68.8%
Radio	£0.6m (5.1%)	£0.9m (4.0%)	+67.7%
TV	£7.7m (71.3%)	£14.7m (64.5%)	+91.5%
Total media	£10.8m (100%)	£22.9m (100%)	+111.7%

Advertising spend by medium: Alcoholic Drinks Range

	2005	2006	% change
Cinema		£1.0m (10.6%)	
Outdoor	£0.4m (7.7%)		-100.0%
Press	£3.0m (53.6%)	£4.1m (45.7%)	+37.6%
Radio	£0.9m (15.8%)	£0.7m (8.1%)	-17.2%
TV	£1.3m (22.9%)	£3.2m (35.6)	+151.8%
Total media	£5.6m (100%)	£9.1m (100%)	+61.6%

Figures in brackets represent proportion of total media spend
Source: Nielsen Media

Volume of television advertising

Alongside the analysis of expenditure figures to gain an understanding of television advertising trends, it is useful to look at the volume of advertising on screen. One measure of this is to look at the number of commercial spots aired on television. The

number of alcohol advertisements shown on television between 2004 and 2006 are shown in Table 7. These figures suggest that, although there has been a 21.1% decline in television advertising spend, there has been an increase in the volume of advertising between 2005 and 2006 with the number of commercial spots aired increasing by 7.4%. This was driven by the increase in advertising activity across the cider category. The volume of alcopop advertisements fell by 67.6% between 2005 and 2006.

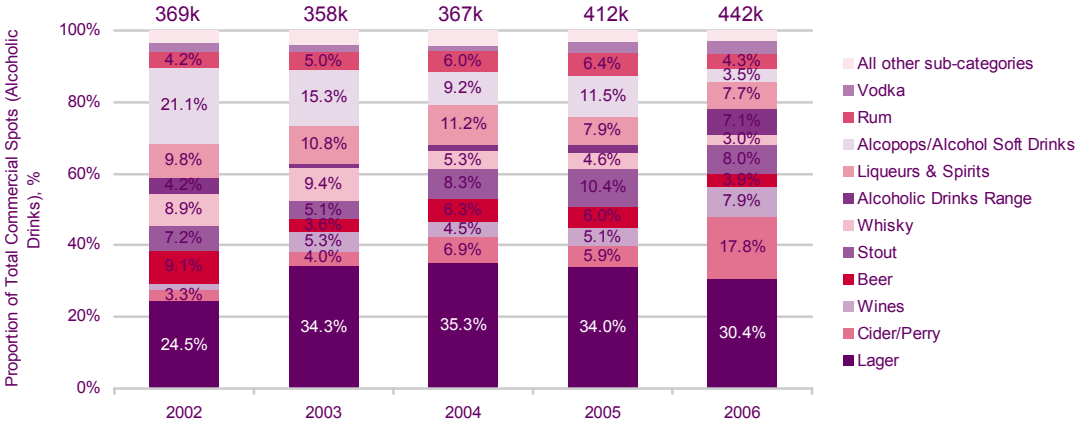
Table 7 Year-on-year change in commercial spot distribution, 2004-2006

	2004 Spots (000s)	2005 Spots (000s)	2006 Spots (000s)	2004/2005 % change	2005/2006 % change
Total	367	412	442	12.1%	7.4%
Lager	130	140	134	8.0%	-4.0%
Cider/Perry	25	24	79	-4.8%	226.5%
Wines	16	21	35	27.2%	65.9%
Beer	23	25	17	8.3%	-31.5%
Stout	31	43	36	39.3%	-16.6%
Whisky	19	19	13	-1.8%	-29.3%
Alcoholic Drinks Range	6	9	32	63.7%	236.9%
Liqueurs & Spirits	41	33	34	-20.8%	4.4%
Alcopops/Alcohol Soft Drinks	34	47	15	40.6%	-67.6%
Rum	22	26	19	19.2%	-27.8%
Vodka	5	12	15	135.9%	27.5%
All other sub-categories	15	13	13	-16.7%	4.5%

Source: Nielsen Media

Cider advertisements accounted for 17.8% of all alcohol adverts shown in 2006, up from 3.3% in 2002. The 'alcoholic drinks range' sub-category represented 7.1% of all alcohol commercials in 2006, up from 4.2% in 2001. Over the same period the proportion of alcohol spots accounted for by alcopop brands declined from 21.1% to 3.5%.

Figure 15 Commercial spot distribution by sub-category, 2004-2006



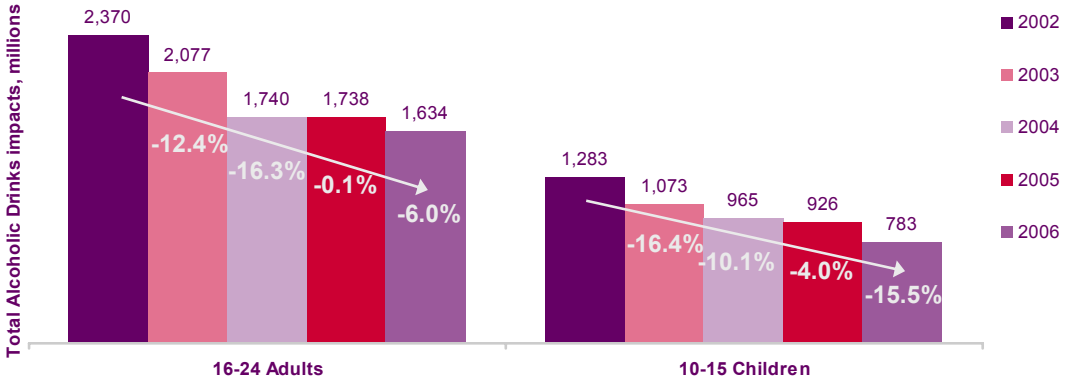
Source: Nielsen Media

Exposure to television advertising

As well as tracking the *amount* of advertising activity, it is also important to consider trends in *exposure* to advertising. Exposure to television advertising is measured in terms of commercial impacts. One impact is equivalent to one member of the target audience viewing one commercial spot.

This analysis has found that despite the increase in the amount of advertising on television (commercial spots) there has been a decline in the amount of alcohol television advertising young people are exposed to. In 2005 a total of 1.7 billion 16-24 adult impacts were delivered across the alcohol category – this fell 6.0% to 1.6 billion impacts in 2006. The decline in impacts amongst 10-15 year olds was more marked, falling 15.5% to 183 million impacts in 2006 – this represented 1.6% of all television advertising seen by this demographic group. Between 2002-2006 there has been a decline of 31.1% and 39.0% in 16-24 and 10-15 year old alcohol advertising impacts respectively.

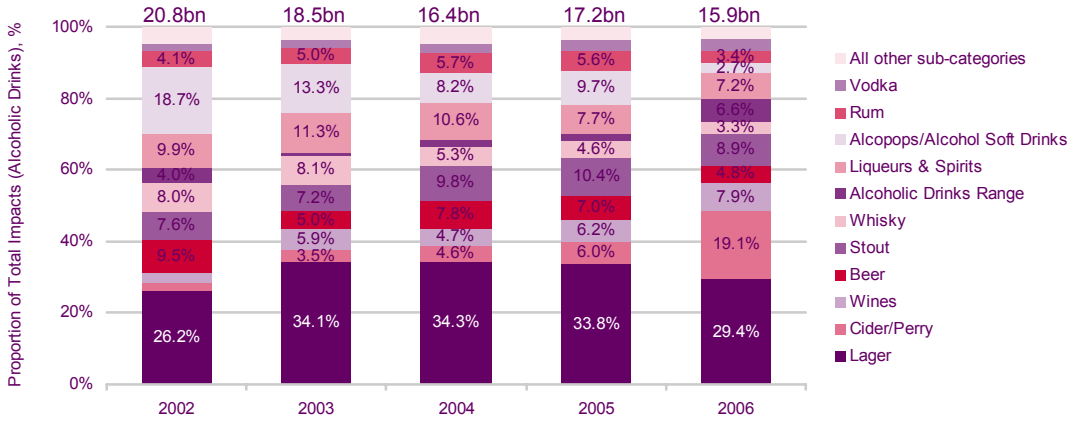
Figure 16 Total alcoholic drinks commercial impacts



Source: Nielsen Media

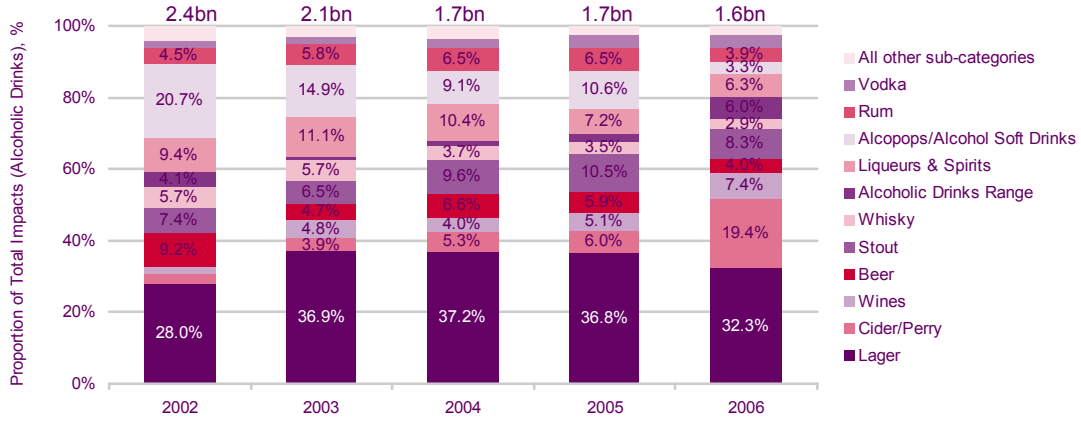
Figures 17-19 show the breakdown of commercial impacts by sub-category for adults, adults aged 16-24 and children aged 10-15. Although the figures are different for each audience, the trends are similar. There has been an overall decline in impacts between 2005 and 2006. At a sub-category level, there has been an increase in the proportion of impacts represented by cider products and brands in the 'alcoholic drinks range' group and a decline in the share of impacts accounted for by alcopop brands.

Figure 17 Television impacts by sub-category: Adults



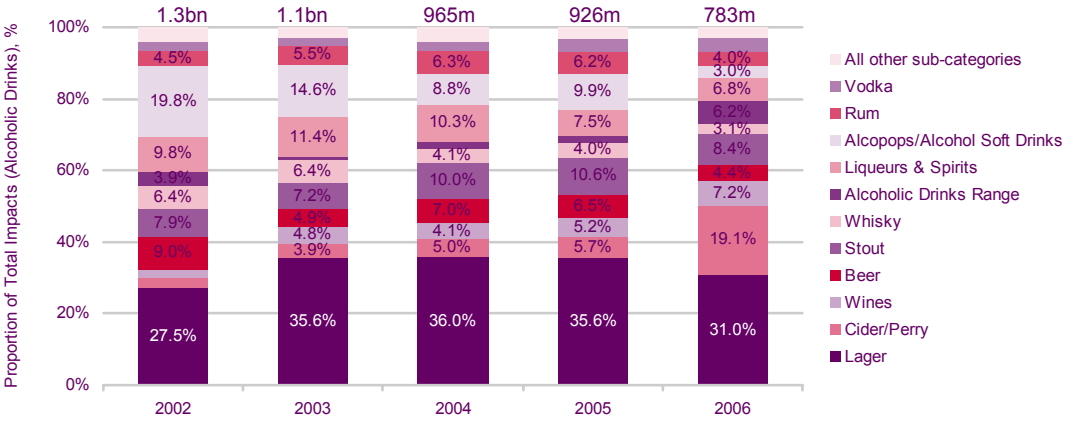
Source: Nielsen Media

Figure 18 Television impacts by sub-category: 16-24 year old adults



Source: Nielsen Media

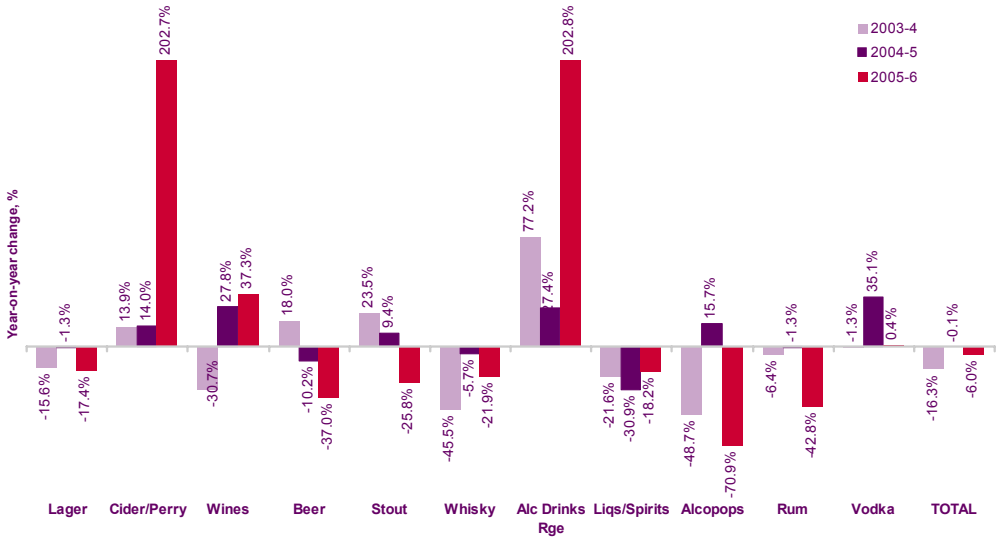
Figure 19 Television impacts by sub-category: Children aged 10-15



Source: Nielsen Media

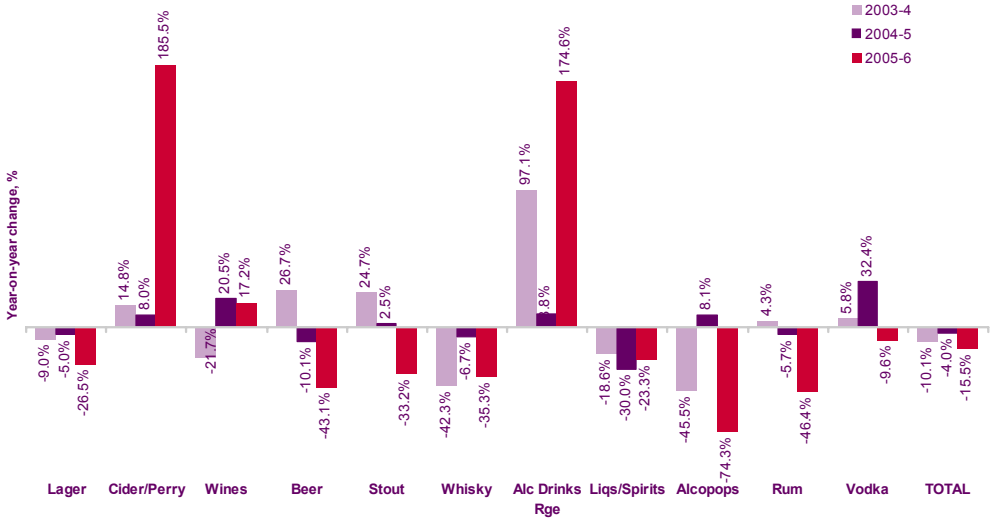
Figures 20 and 21 show the change in impacts delivered by sub-category for adults aged 16-24 and children aged 10-15. This highlights the dramatic changes in the advertising these audiences have been exposed to over the past few years with an increase in consumption of cider advertising and brands within the 'alcoholic drinks range' sub-category and the decline in exposure to alcopops advertising. However, between 2005 and 2006, apart from the marked increase in exposure to cider and 'alcoholic drinks range' advertising, there has been a fall in exposure across the majority of sub-categories.

Figure 20 Change in television impacts: 16-24 year old adults



Note: Only the largest sub-categories based on 2006 total media spend are shown
Source: Nielsen Media

Figure 21 Change in television impacts: Children aged 10-15



Note: Only the largest sub-categories based on 2006 total media spend are shown
Source: Nielsen Media

Section 5

Appeal of alcohol advertising

This section starts off by outlining the research findings surrounding young people's relationship with advertising generally. It then goes on to examine reactions to the advertisements tested in 2007 against those tested in 2005 and seeks to identify whether the appeal of alcohol advertising has reduced as a result of amendments to the BCAP (TV) and CAP Codes.

As mentioned previously, the advertisements included as case studies in the pre-wave were all broadcast/published during the second half of 2004, prior to the January 2005 amendments to the Advertising Standards Code. Those selected for the post-wave were all aired/published after regulatory change.

Reminder Note: For reasons of commercial sensitivity, the specific advertisements researched have been de-branded within this section.

Key findings

- Recall of alcohol advertising has declined - there has been a significant decline in the average number of unprompted mentions of alcohol adverts from 3.95 to 3.31. Among the different sub-categories of drinks, the following changes in recall were recorded:
  - Beer – down from 76% in 2005 to 69% in 2007
  - Alcopops – down from 50% in 2005 to 42% in 2007
  - Vodka – down from 20% in 2005 to 16% in 2007
  - Spirits/liqueurs – down from 17% in 2005 to 7% in 2007
  - Cider – up from 6% in 2005 to 19% in 2007

- A comparison of media activity during the pre and post waves[11] of research shows that total alcohol advertising spend fell by 2.9% and television advertising spend fell 26.2%. Between the two phases of research, the following changes in television advertising spend were seen:
  - Beer – down 64%
  - Alcopops – down 71%
  - Vodka – up 28%
  - Spirits/liqueurs – down 57%
  - Cider – up 159%

- Therefore with the exception of vodka, the downward shift in television advertising spend was matched by a downward shift in advertising recall – and for cider the increase in spend was accompanied by an increase in recall. Based on this analysis it is not possible to attribute the fall in recall of alcohol advertising to a reduction in appeal of advertising as most changes in recall are mirrored by changes in advertising spend.

[11] In order to understand the trends in recall within the context of media activity during these periods we have analysed advertising activity during December 2004-June 2005 for the benchmarking study and December 2006-June 2007 for the post-wave research.

- Making like for like comparisons between the adverts from the 2005 and 2007 waves of research must be approached with caution. However, based on a range of measures used to test the broad appeal of each television commercial tested in the quantitative stage, the following conclusions can be made:
    - The likeability of television adverts (based on a ranking of advertisements from 1-10, 1 for 'don't like it at all' and 10 for 'like it a lot') has not changed between the two waves of research. The average score for how much the adverts were liked was 6.1 out of 10.0 at the pre-stage in 2005 and this has remained the same in 2007.
    - Young people are less likely to say that they feel the adverts are aimed at them – the average score for net agreement[12] with this statement has fallen from 7% in 2005 to -13% in 2007.
    - However, young people are more likely to say that the adverts make the drink look appealing (average net agreement score has increased from 25% in 2005 to 34% in 2007) and that they will encourage people to drink (the average net agreement score has increased from 24% in 2005 to 28% in 2007.
- Selecting press/poster alcohol adverts which might appeal to young people proved particularly difficult during the post-wave. Compared with the average scores recorded for the press/poster adverts included in the pre-wave, consistently lower scores were recorded during the post-wave for 'aimed at people like me', 'makes the drink look appealing and 'will encourage people to drink'.

Advertising relationships and general appeal

It is widely acknowledged that young people today are advertising and marketing savvy. Their relationship with, and understanding of, advertising is complex and varies according to age, exposure and relevance, as well as a whole host of other factors. On a very simple level, advertising relationships can be described ranging from a rational relationship to a more complex emotional one.

Rational: A logical understanding that the advertiser is trying to sell a product, target particular audiences, make a brand well-known in the marketplace or persuade consumers to buy the product/services.

Emotional: How advertising makes people feel a certain way about the message or theme of the advertisement, and the relevance of this message and/or theme in their lives, and ultimately how the advertising makes the consumer feel about a brand/product/service.

Emotional advertising often has the strongest appeal for young people, as these types of advertisements often 'talk their language' and portray images or events that are relevant

[12] Net scores are calculated by subtracting the proportion of young people who disagree with the statement from the proportion who agree. A negative net score is achieved when a larger proportion of young people disagree with the statement than agree with it.

to their lives and interests. This type of advertising tends to be very lifestyle and image focused and operates on an aspirational level.

Based on discussions about advertising in general (across all products, not specifically alcohol advertising) with young people, the elements that young people liked that came up consistently across the groups included humour, music, originality, the unexpected and people having fun or behaving in a childish fashion. Other core triggers included originality, quirkiness and fantasy settings. There was also some evidence that advertisements where the product/brand was central to the execution/storyline had a stronger product/brand impact among young people. 'Mouthwatering' product shots also tend to stand out for young people.

All age groups in the research voiced a determination not to be seduced by advertising – this is, however, a common response of respondents when researched. When people discuss how advertising and marketing activities may affect them as individuals, they tend to say that advertising and marketing is not influential in their lives and only impacts on other people.

"You get that theme a lot in adverts – that David Attenborough type thing, Waitrose does telling you about where everything has come from so you'll buy it because it's ethical. It's all marketing at the end of the day."
Female, 16-17, Manchester, 2007 post-wave

As mentioned earlier, what makes advertising appealing in general was discussed in great detail in the 2005 pre-wave of research. However these findings still hold true in 2007.

The following age group differences were observed within the qualitative groups in 2005[13] when discussing advertising in general (across all product groups, not specifically alcohol advertising):

11-13 year old females tended to be attracted to advertisements that contained bright, colourful, eye-catching images, had strong music/dominant sound tracks and contained 'mouth watering' product shots.

Male 11-13 year olds particularly liked advertisements with slapstick humour. The humour most liked was often blatant and juvenile. There was a need for a blatant advertising message and product link for the advertisement to make sense, and therefore work on their level.

The 14-15 year old female participants were more drawn to the stylistic elements of an advertisement, focusing on colours, lighting, camera movements, clothes and the look of the actors. Originality and music also played a role in making an advertisement appealing to this age group. Many females in this age group are beginning to discover their own sexuality and sexual confidence, and this influences their attitudes towards

[13] These findings are based on the qualitative research conducted during the benchmarking study and as such the age groups cannot be re-defined – it was also found that the results were more revealing when defined by actual behaviour than when defined as being above or below the legal alcohol purchasing age (please see Research Note 3 in Section 2)

how sex is depicted in advertising. They become more aware of sexual undertones, although overt sexual imagery is not always liked by everyone, and can be polarising.

The **14-15 year old males** in the groups found sexual imagery, speed, adrenalin/aggression and playful humour appealing in general. As with the younger females (11-13 year olds), the adverts that worked best for this group were those that were easy to decode and had a fairly straight-forward message (at least on the surface). Abstract advertising or unfamiliar settings were not always understood and became confusing. Clever, unexpected, self-contained humour or storylines where a normal scene rapidly becomes fantasy did, however, have strong appeal as they could see how the advertisements progressed away from normality. Overt product presence was also important for this group so they could clearly see the link with the product.

The **16-21 year old females** in the qualitative groups tended to be more 'ad-literate' than the others and were more able to understand when an advert was communicating a personality or an image rather than a more straightforward sales/product persuasion message. Despite being more ad-literate than the other groups they were still attracted to advertising with young humour.

The **16-21 year old males** in the qualitative research liked advertisements that were considered clever and contained humour. Advertisements spontaneously mentioned were Mini Cooper and Hellmann's Mayonnaise. These are examples of normal scenes where the unexpected or random, ironic incidents occur.

Alcohol advertising and appeal

Qualitative analysis (and semiotic study in 2005) identified three main emotional themes that appeal to young people, specifically in relation to alcohol advertising:

- Aspirational imagery of adult drinking
- Familiarity/relevance
- 'Kidult' marketing codes

The advertisements included within the 2007 study tended to focus more on aspirational tones and familiarity or relevance of the product and message, than the overt use of 'kidult' marketing codes which were more prominent among the executions shown in the pre-wave stage of 2005.

Aspirational imagery of adult drinking

As part of the growing up process younger people tend to aspire to being older and images of maturity and sophistication are often very appealing (although not too much older); this was confirmed in the research findings in the pre and post wave studies. Advertisements that operate through aspirational imagery often include scenes of attractive, well-dressed people in bars, clubs or parties. These types of advertisements conjure up notions of what it would be like to be in a carefree, confident environment.

"You just want to be out there chilling out in the sun by the beach drinking, no worries."
Male, 16-17, London, 2007 post-wave

"They hit the nail on the head with that advert. It shows where you want to be and the type of fun you could be having"
Female, 14-15, Belfast, 2007 post-wave

"I would love to be at a party like that. They're all drinking and dancing and having fun."
Male, 14−15, Manchester, 2005 pre-wave

Familiarity/relevance

Observations from the qualitative research indicate that advertisements can be more appealing when the events in the storyline are familiar or have a resonance with the viewers' life experiences. For example, younger age groups may not respond so strongly to advertisements where the storyline is set in an adult environment, such as an office or other work-related environment. Conversely, advertisements that centre on environments such as bars, clubs, the beach or popular activities, such as sports, tend to have strong appeal.

"That ad just captures everything terrible that happens to you when you go out on the town drinking. You can relate to it instantly "
Female, 14-15, Wales, 2007 post-wave

"I want to be out there on that beach right now! It reminds you of going on holiday just chilling out in the sun with a beer"
Male, 16-17, London, 2007 post-wave

However, it should be noted that likeability of the execution does not guarantee likeability of the product/brand. For the brand to benefit there has to be an existing relationship, point of relevance/appeal or some form of persuasion.

"I don't think 14 year olds really drink gin. A bottle of gin or whiskey is too expensive. So cool ad with the old guy and all but I don't really drink gin."
Female, 14-15, London, 2007 post-wave

'Kidult marketing' codes

It is generally acknowledged that increasingly in our culture it is acceptable for adults to choose different identities for themselves without feeling that as they grow older they need to have a firm 'responsible' identity (for instance, men in their thirties may be as fascinated by an X-Box as a 14 year old without any real negative connotations). Being youthful is traditionally associated with irresponsible, unsafe and 'exciting' behaviour, and when adults choose this kind of youthful behaviour they can be described as adopting 'kidult' behaviour.

Kidult marketing is a strategy that harnesses these values and attitudes of childhood/youth for marketing adult products, and works in reverse to aspirational marketing techniques. Semiotic research conducted as part of the 2005 pre-wave study identified typical kidult codes as adults having fun, being irresponsible, behaving like children and adopting youth behaviour. While the 'kidult' theme is ostensibly aimed at adults, it blurs the fixed lines between adults and children with 'kidults' laying claim to childhood or youth.

Such advertisements promote a particular view of adulthood that often includes freedom, a lack of sophistication and a world free of responsibilities. With regard to alcohol advertising that can result in a view of adulthood that depicts irresponsible and childish behaviour in 'adult drinking'. Alcohol advertisements that play on the boundary of adult and teenage behaviour to bring the teenage and adult world closer together appear to have strong appeal for young people. While this was not overtly expressed in many of the executions tested in the 2007 post-wave it still grabs young people's attention.

"Those guys running around in those costumes, that's just hilarious. You know its got to be people in college or in their twenties at least or maybe thirties just messing about having fun. Might be on a stag do or something."
Male, 16-17, Manchester, 2007 post-wave

Summary of changes to the Advertising Code

Reflecting the Government's concerns that were expressed in its *Alcohol Harm Reduction Strategy*, the Advertising Code was strengthened in four main ways so that the new, 2005, restrictions were stricter on:

- the general appeal of alcohol ads to young persons, especially under-age drinkers, and references to "youth culture";
- linking alcohol with sex, sexual activity or sexual success;
- linking alcohol with aggressive, anti-social or irresponsible behaviour and
- the depiction of irresponsible handling or serving of alcohol.

Comparative quantitative assessment of changes in recall of alcohol advertising

When asked which alcoholic drinks brands they remember seeing or hearing advertising for recently, the average number of brands mentioned by 11-21 year olds in 2007 was 3.31. This is a significant decline in the average number of responses given in 2005 (3.95) and the decline in recall is apparent across all age groups.

Table 8 Spontaneous recall of alcohol advertising

	Pre-wave %	Post-wave %	Difference %
11-21	3.95	3.31	-0.64
11-13	3.02	2.23	-0.79
14-17	4.29	3.42	-0.87
11-17	3.79	2.94	-0.85
18-21	4.27	4.02	-0.25
Male	4.10	3.36	-0.74
Female	3.79	3.24	-0.55

Q Which alcoholic drink brands can you remember seeing or hearing advertising for recently?
Base: 11-21 (1,539; 1,514), 11-13 (396; 377), 14-17 (633; 611), 11-17 (1,029; 988), Male (770; 790), Female (769; 724)
Source: Ipsos MORI 2005 and 2007 studies

While it could be suggested that this decline in recall is due to a reduction in appeal of alcohol advertising, it is imperative that these findings are placed within the context of the media analysis detailed in Section 4. This analysis found that total alcoholic drink advertising spend fell £27m between 2005 and 2006, and that the greatest shifts in spend during this period were a sizeable increase in the cider market and a marked decline in the alcopops sub-category.

Table 9 shows the change in young people's recall of advertising across the alcoholic drinks categories during the pre and post waves of research. There has been a decline in recall of beer/lager, alcopops, vodka and spirits advertising and an increase in the recall of cider brands. There were no significant changes in recall of other alcoholic drinks categories not listed including whisky, wine or gin advertising – it is interesting to note here that recall is generally low for these categories which may be linked to the fact these drinks are not particularly popular among young people.

Table 9 Changes in combined recall of advertising by alcoholic drinks category

	Advertising recall - 2005	Advertising recall - 2007	Percentage point change
Beer	76%	69%	-7
Alcopops	50%	42%	-8
Vodka	20%	16%	-4
Spirits/liqueurs	17%	7%	-10
Cider	6%	19%	+13

Q Which alcoholic drink brands can you remember seeing or hearing advertising for recently?
Base: 2005 (1,539), 2007 (1,514)
Source: Ipsos MORI 2005 and 2007 studies

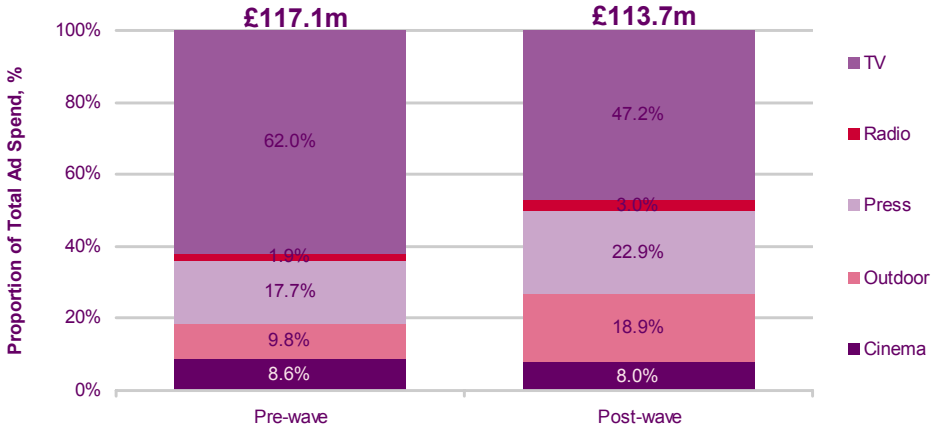
Media Analysis: Comparison of advertising activity between the pre and post research waves

As detailed in the methodology, the quantitative research was conducted between April-June both during the benchmarking study and the 2007 study. In order to understand the trends in recall within the context of media activity during these periods we have analysed advertising activity during December 2004-June 2005 for the benchmarking study and December 2006-June 2007 for the post-wave research[14]. These periods were used to cover a number of months prior to the research including December, a key time of year for alcohol advertising, as advertising recall may have been affected by activity several months prior to the research.

Between the two waves of research, the proportion of total alcohol advertising represented by television advertising fell from 62.0% to 47.2% while press and outdoor (poster) advertising increased.

[14] Advertising activity data has been sourced from Nielsen Media and is based on the 'Alcoholic Drinks' sub-category within the 'Drinks' category as classified by Nielsen Media.

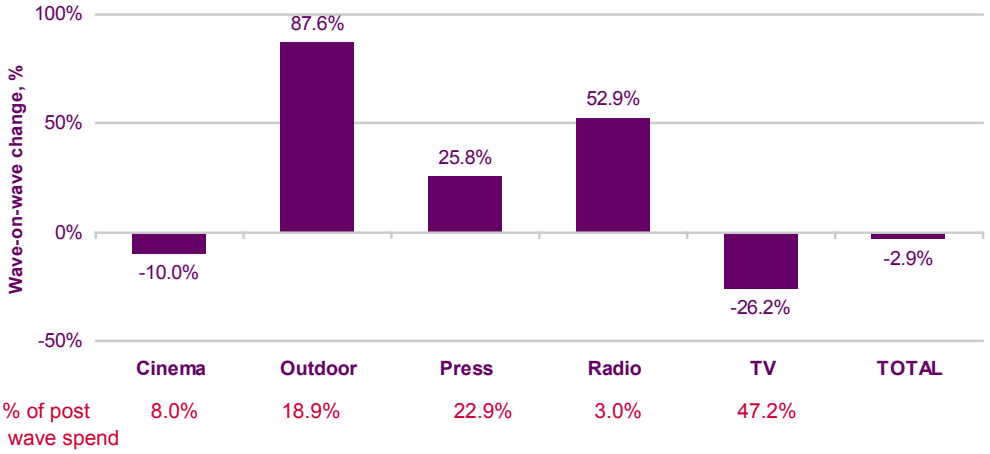
Figure 22 Alcoholic drinks advertising expenditure by media



Source: Nielsen Media
Pre-wave: December 2004-June 2005. Post-wave: December 2005- June 2006

Overall alcohol advertising spend fell marginally by 2.9% between the 2005 study and 2007 study, driven by a 26.2% decline in television spend. The overall decline in advertising recall may have been affected by the decline in television advertising activity as this medium represented the majority of spend during the pre-wave research. However there were significant increases in outdoor, press and radio advertising spend which combined accounted for 44.8% of spend during the post-wave, up from 29.4% during the pre-wave.

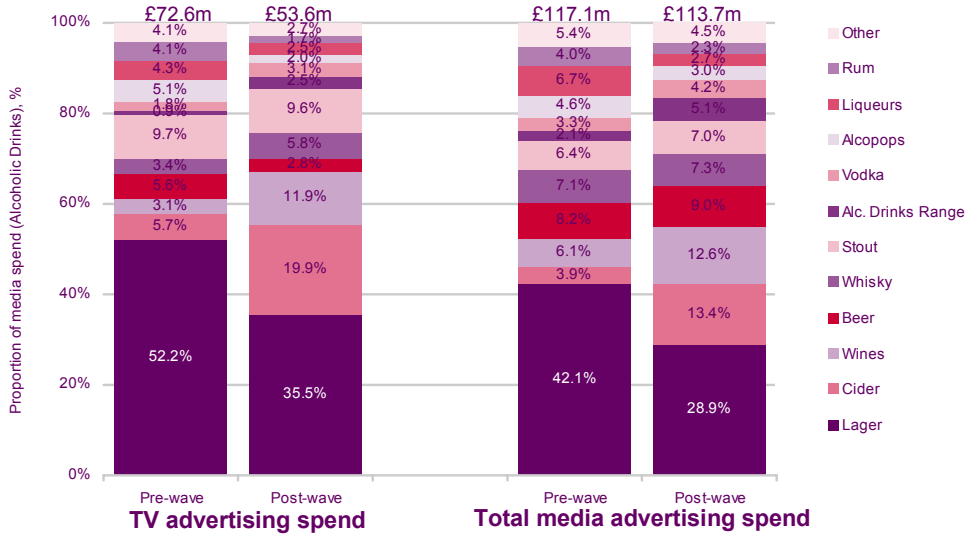
Figure 23 Change in alcoholic drinks expenditure by media: Pre vs post wave



Source: Nielsen Media
Pre-wave: December 2004-June 2005. Post-wave: December 2005- June 2006

As previously noted in Section 4 there have been significant changes in the amount of media activity accounted for by the different sub-categories. Between the pre and post waves of research there were significant increases in the proportion of advertising spend both on television and across all media represented by cider and wine brands.

Figure 24 Alcoholic drinks advertising expenditure by sub-category

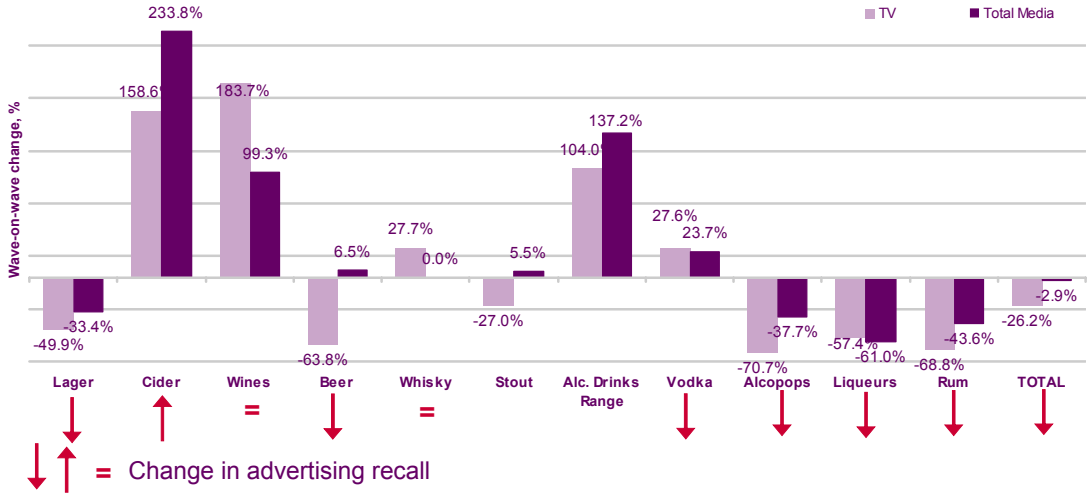


Source: Nielsen Media
Pre-wave: December 2004-June 2005. Post-wave: December 2005- June 2006

Figure 25 shows the change in total and television advertising spend compared with the change in advertising recall between the two waves of quantitative research[15]. This highlights the increase in spend across the cider and wines sub-categories and the decline in spend across the lager, beer, alcopops, liqueurs and rum sub-categories. More importantly, this analysis shows that with the exception of vodka, the downward shift in television advertising spend was matched by a downward shift in advertising recall across the relevant sub-categories. The increase in advertising spend by cider manufacturers was also matched by an upward shift in recall. However, the significant increase in wine advertising or whisky activity on television did not lead to corresponding increases in recall – this again maybe linked to the fact that these drinks categories are not particularly popular among young people.

[15] The Nielsen Media sub-categories are different to the sub-categories used in the quantitative research. The recall data for lager and beer was combined and is compared against both the lager and beer Nielsen Media categories. Within Nielsen Media, there are two separate categories for liqueurs/spirits and rum - these are combined in the quantitative study. There are no equivalents of the stout or 'alcoholic drinks range' Nielsen Media sub-categories in the quantitative study.

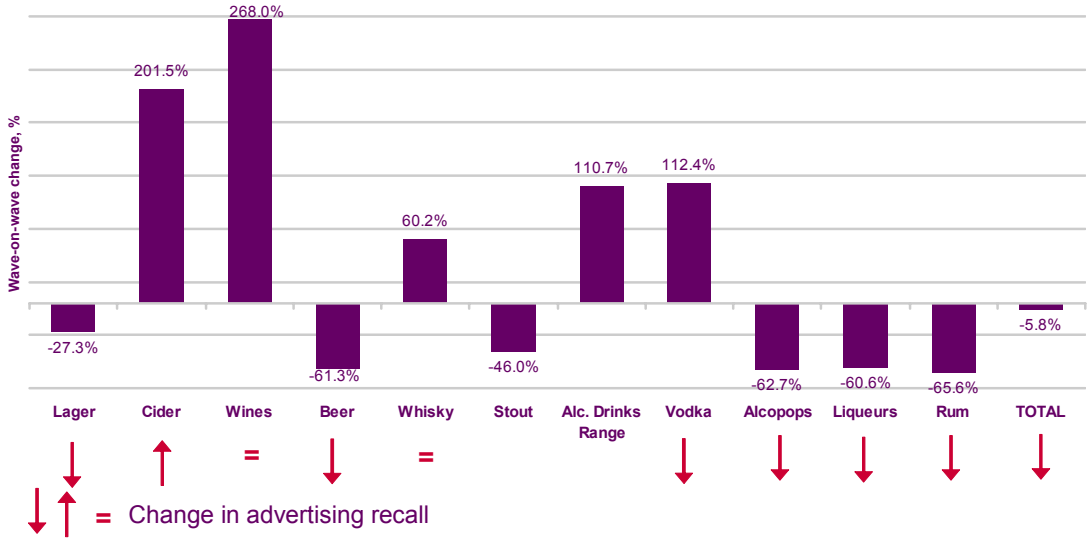
Figure 25 Change in alcoholic drinks expenditure by sub-category: Pre vs post



Note: Only the largest sub-categories based on the post-wave total media spend are shown
Source: Nielsen Media
Pre-wave: December 2004-June 2005. Post-wave: December 2005- June 2006

In order to understand the changes in activity on television in more detail, analysis was also conducted on young people's exposure to television advertising (commercial impacts). Similar trends as for advertising spend are seen when looking at commercial impacts by sub-category (both for 16-24 year olds and 10-15 year old children) – the increase in exposure to cider advertising was matched by an increase in recall and with the exception of vodka the fall in advertising exposure was matched by a fall in recall across the various categories.

Figure 26 Change in alcoholic drinks television impacts by sub-category: Pre vs post, Adults aged 16-24



Note: Only the largest sub-categories based on the post-wave total media spend are shown
Source: Nielsen Media
Pre-wave: December 2004-June 2005. Post-wave: December 2005- June 2006

Based on this analysis it is not possible to attribute the diminished recall of alcohol advertising to a reduction in appeal of advertising, as in most cases the decline in recall is mirrored by a drop in spend.

Comparative quantitative assessment of appeal of alcohol advertising

In order to quantitatively assess appeal, advertisements tested in each wave of research were assessed on a number of dimensions, including:

- How much the advert is liked (ratings out of 10).
- Whether it was felt to be aimed at 'people like me' (agree−disagree).
- Whether the advert makes the drink look appealing (agree−disagree).
- Whether the advert will encourage people to drink (agree−disagree).

Looking at whether or not the adverts are seen by young people as being aimed at them is particularly relevant in relation to the objectives of the Code changes.

A comparison of the average net scores[16] recorded on each of these dimensions in the post-wave, against those tested in the pre-wave leads to some interesting insights, which are distilled below. However, making like for like comparisons between the adverts included within each wave of the research must be approached with caution.

These executions were *not* a random selection of alcohol advertising designed to be representative of the alcohol category in 2005 and 2007. They were chosen as examples of advertising styles and techniques that were aimed at the younger end of the legitimate alcohol market but which were thought likely to also appeal to 'under 18 year olds'. That the process of initially identifying executions which met these criteria was more difficult in 2007, indicating anecdotal evidence of a decline in the *quantity* of executions likely to appeal to under 18 year olds following regulatory change and as a result the commercials tested in the post wave were to some extent the edgier end of the market.

Broadcast alcohol advertising: Likeability

As we have discussed, the elements that young people like in advertising were established during the pre-wave of research to include: humour, music, originality, the unexpected and people having fun or behaving in a childish fashion. Other core characteristics identified are originality, quirkiness and fantasy settings.

Young people were asked to rate each of the adverts they were shown in terms of how much they like the advertising (rating between 1 'don't like it at all' and 10 'like it a lot').

[16] Net scores are calculated by subtracting the proportion of young people who disagree with the statement from the proportion who agree. A negative net score is achieved when a larger proportion of young people disagree with the statement than agree with it.

On average there has been *no change* in how much young people like the adverts tested in each wave. The average score given was 6.1 out of 10.0 at the pre-stage in 2005 and this has remained almost exactly the same in 2007 (6.0). This consistency is true for all age groups and for both males and females.

However, as discussed earlier within this section, understanding the appeal of alcohol advertising involves an in-depth comprehension that goes beyond the superficial 'liking' or enjoyment of advertisements. Likeability of an advert can be driven purely from a response to the creative execution, and this will not necessarily transfer to a liking for the product.

This is well illustrated by a case study of one of the executions tested in the benchmarking study. The advertisement for this brand was clearly enjoyed and liked by young people even though they did not think that the advert was aimed at them or that it made the drink look appealing. The reason for the strong and positive response was driven by the use of a celebrity and a humorous storyline. The reluctance to agree the advert was aimed at them, or that it made the drink look appealing was driven by two key factors. First, the product was not central to the execution, meaning that the brand did not gain the full benefit of the executional response due to this detachment. Second, and perhaps more importantly, this brand is not a popular choice among this age group and would not ordinarily sit within young people's drinking repertoires. Therefore, even though the executional response was strong, driven by the use of a celebrity and humour, the brand response was limited.

Broadcast alcohol advertising: 'Aimed at people like me'

As discussed earlier, emotional advertising often has the strongest pull for young people. Executions which appeal on an emotional level often 'talk their language' and portray images or events that have a resonance with the viewers' life experiences.

On average, young people are *less* likely to say that the adverts tested in the post-wave are **'aimed at people like me'**. Overall, the average net agreement score for this statement has fallen from 7% to a negative figure of -13%[17]. This decline is apparent across all demographic groups. The most marked downturn is found among those just below the age when it is legal to purchase alcohol – those aged 14-17 years, among whom the average net agreement score has fallen by 27 percentage points from 11% to -16%.

Those within the 18-21 year old group, and therefore within the legitimate alcohol market, are the only group recording a positive average net-agreement score during the post-wave – although this also decreased in 2007.

[17] Net scores are calculated by subtracting the proportion of young people who disagree with the statement from the proportion who agree. A negative net score is achieved when a larger proportion of young people disagree with the statement than agree with it.

Table 10 Advert is 'aimed at people like me'

	Pre-wave %	Post-wave %	Difference %
11-21	7	-13	-20
11-13	-44	-58	-14
14-17	11	-16	-27
11-17	-11	-33	-22
18-21	42	27	-15
Male	6	-12	-18
Female	5	-14	-19

Q I am now going to read out some things which people have said about this advert. Please tell me how strongly you agree or disagree that each statement applies

Base: 11-21 (1,539; 1,514), 11-13 (396; 377), 14-17 (633; 611), 11-17 (1,029; 988), Male (770; 790), Female (769; 724)

Source: Ipsos MORI 2005 and 2007 studies

While no comprehensive content analysis of the alcohol adverts aired in 2005 or 2007 has been conducted, the adverts tested in 2007 generally contained fewer of the elements that were identified previously as 'talking to' and consequently appealing to young people, particularly: sexual context, sporting elements and 'young humour'. The adverts also featured fewer young people. It is likely that lower prevalence of these features, have contributed to this downturn in young people's perceptions of the adverts being 'aimed at them'.

Broadcast alcohol advertising: 'Makes the drink look appealing' and 'Will encourage people to drink'

Despite the down turn in the extent to which young people felt the adverts included within the post-wave were 'aimed at people like me', the research has identified that young people are more likely to say that the adverts tested in 2007 do, on average, **'make the drink look appealing'**, than the adverts tested during the pre-wave. The net agreement score has increased from 25% in 2005 to 34% in 2007. However it is important to note that the most marked increase in this average rating is among 18-21 year olds i.e. those within the legitimate alcohol market.

Table 11 Advert 'makes the drink look appealing'

	Pre-wave %	Post-wave %	Difference %
11-21	25	34	+9
11-13	11	16	+5
14-17	29	38	+8
11-17	22	29	+7
18-21	31	42	+10
Male	25	34	+9
Female	21	33	+12

Q I am now going to read out some things which people have said about this advert. Please tell me how strongly you agree or disagree that each statement applies
Base: 11-21 (1,539; 1,514), 11-13 (396; 377), 14-17 (633; 611), 11-17 (1,029; 988), Male (770; 790), Female (769; 724)
Source: Ipsos MORI 2005 and 2007 studies

When asked about the extent to which they agreed or disagreed that the adverts tested during the post-wave '**will encourage people to drink'**, the average net agreement score recorded among young people was also higher than that recorded for the pre-wave adverts (28% compared to 24%).

Table 12 Advert 'will encourage people to drink'

	Pre-wave %	Post-wave %	Difference %
11-21	24	28	+4
11-13	16	22	+6
14-17	24	29	+5
11-17	21	26	+5
18-21	31	31	0
Male	26	28	+2
Female	20	27	+7

Q I am now going to read out some things which people have said about this advert. Please tell me how strongly you agree or disagree that each statement applies

Base: 11-21 (1,539; 1,514), 11-13 (396; 377), 14-17 (633; 611), 11-17 (1,029; 988), Male (770; 790), Female (769; 724)

Source: Ipsos MORI 2005 and 2007 studies

In order to establish why these scores have increased, it is necessary to examine, in greater detail, the adverts which generated above-average scores, and as such were responsible for pushing the overall average scores up.

Table 13 Brand comparison

	A (768) %	B (756) %	C (695) %	D (762) %	E (743) %	F (766) %	G (807) %	H (759) %	Average (1,514) %
Makes the drink look appealing	41	44	2	31	57	40	31	22	**34**
Will encourage people to drink	31	48	7	26	47	24	20	19	**28**

Q I am now going to read out some things which people have said about this advert. Please tell me how strongly you agree or disagree that each statement applies
Base: All who were shown each advert – Actual bases shown in brackets
Source: Ipsos MORI 2007 study

As we have seen, advertisements where the product/brand is central to the execution/storyline tend to have a stronger appeal among young people. In fact there were a number of adverts included within the post-wave where the drink was central to the storyline and which generated above average scores for 'makes the drink look appealing' and 'will encourage people to drink'.

Adverts B and E in particular stand out as generating the most widespread agreement in these respects. Both are set within a club/bar and portray a positive image of the brand within a social setting which young people agree is a situation they would like to be in. These advertisements operate through aspirational imagery, including scenes of good looking, stylish people in bars, clubs or parties, invoking notions of what it would be like to be with beautiful people in a relaxed, confident environment. Both adverts also include a layer of humour which ensures young people find them to be both funny and entertaining.

"You just want to be sat there on that beach, chilling out listening to cool music, not a care in the world. That's what it's all about."
Female, 16-17, Manchester, 2007 post-wave

Advert B was considered by young people to be among the sexier, more glamorous adverts included within the post-wave, while advert E was described as quirky and featured music and an atmosphere which were relevant to and liked by young people. Both adverts were felt to be up to date, relevant to young people's lives and cool showing that aspirations can relate to both glamorous settings as well as relaxed, casual ones.

"It's quite a sexy advert actually – the music, the hot woman, that green stroby lighting and people dancing close to each other."
Female, 16-17, Manchester, 2007 post-wave

"I like the way they're all kind of leaning back, chilling out and it's pretty funny. The whole thing comes together well. It's a quirky ad, you wouldn't expect it. The music's good as well, very relaxed."
Male, 14-15, Wales, 2007 post-wave

Another of the adverts which was widely considered to 'make the drink look appealing' and felt to 'encourage people to drink' (advert A) is aspirational with its use of humour, featuring a clever and witty character with personality attributes young people would like to adopt themselves in order to enhance their image among their peer group. This advert was also described as funny and entertaining. Young people particularly identified with the good time/fun being had – it is a good example of the kidult marketing strategy.

"That's wicked, it's hilarious. Makes you snigger and giggle. Couple of my mates are like that – always messing about, having a laugh. That's what we're like. That ad is so meant for us"
Male, 14-15, 2007 post-wave

'Mouth watering' product shots were featured in advert F - another which generated high levels of agreement that it 'makes the drink look appealing', although this advert did not generate an above average score in term of it's impact on 'encouraging people to drink'. The focus of this advert is on the product itself rather than the experience it represents. It seeks to persuade its audience of the appetising taste offered, diverting attention away from the alcoholic content of the product and emphasising the natural ingredients from which the product is made. It is these aspects of the advert that young people noticed and liked.

Advert F was found to appeal particularly to females – a finding which is consistent with a recurring theme identified during the qualitative research - young females tend to be more health and weight conscious than males, more aware of the importance of maintaining a healthy balanced diet and more attracted by bright colours used to emphasis these points.

"They make it look really tasty and fruity. It's bizarre for sure but I like the way the drink is squeezed out"
Female, 14-15, London, 2007 post-wave

"I love that red, cranberry looking liquid. They make it look really yummy, like you'd want to drink it. It just looks like yummy fruit juice, refreshing."
Female, 14-15, London, 2007 post-wave

Press/poster alcohol advertising

In tandem with the process of changing the rules on the advertising of alcohol products on television the Committee of Advertising Practice (CAP) amended the alcohol rules in the non-broadcast advertising Code.

As with the benchmarking study three press/poster executions were also tested in the quantitative stage. Selecting press/poster adverts which might appeal to young people proved particularly difficult during the post-wave and the likeability scores for all the press/poster adverts which were subsequently included turned out to be low – on average 20% (compared with 28% in 2005).

Likewise, compared with the average scores recorded for the press/poster adverts tested in the pre-wave, consistently lower scores were recorded during the post-wave for 'aimed at people like me', 'makes the drink look appealing and 'will encourage people to drink'. The

considerable decline in the extent to which young people felt these statements applied to the press/poster adverts tested in 2007 is illustrated in Table 14. Agreement with each is, on average, a negative score demonstrating that a larger proportion of young people disagreed that these statements applied to the press/poster adverts tested than the proportion who agreed they did. In a number of cases, young people found it hard to understand the message of the advert and struggled to make the link between the message and the drink being promoted. The lack of appeal was apparent among all demographic groups.

Table 14 Press/poster adverts

	Pre-wave %	Post-wave %	Difference %
This advert is aimed at people like me	15	-31	-46
This advert makes the drink look appealing	21	-7	-28
This advert will encourage people to drink	18	-9	-27

Base: 2005 (1,539), 2007 (1,514)
Source: Ipsos MORI 2005 and 2007 studies

Summary

As mentioned previously, like for like comparisons between the adverts from the 2005 and 2007 waves of research must be interpreted with caution because they were chosen as examples of advertising styles and techniques that were considered likely to appeal to 'under 18 year olds', rather than because they were representative of executions within the alcohol category before and after regulatory change.

In 2005 when the Advertising Code changes came into force it was felt necessary to provide a benchmark by which the appeal of future commercials would be measured. However, since the Advertising Code changes came into place in 2005 and between the two waves of research there have been considerable market and cultural changes (including changes in licensing laws, changes in the types of drinks that are popular and Drink Aware commercials`) which have meant that the two waves are not directly comparable and it would be difficult to untangle the impact of these changes on young people's attitudes and behaviour towards both alcohol and alcohol advertising.

The alcohol advertising market has changed significantly, particularly with regards to television advertising. Television advertising spend has declined and young people are exposed to less television advertising for alcohol products. The recall of alcohol advertising has declined since 2005 and is most probably linked to this decline in advertising spend.

There has been no change in how much young people say they like the adverts and there has been an increase in those saying the adverts make the drink look appealing and would encourage people to drink it. Importantly, however, given the objectives of the Advertising

Code changes, there has been a decline in the proportion of young people saying they feel the commercials are aimed at them.