

Shattered Myths
Major findings from
alcohol brand research
among underage drinkers

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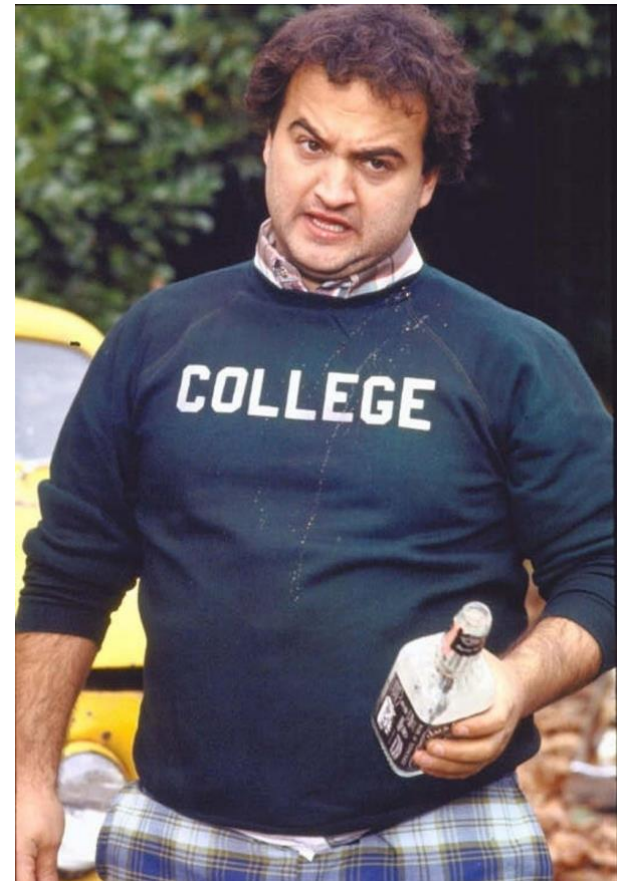
Dedicated to the Memory of John E. Roberts



May 11, 1949—October 24, 2014

Introduction

- Underage drinking prevalence
 - 70% lifetime; 25% past-month
- Consequences of alcohol use
 - DUI, ER visits, AUD risk, legal issues
- How we measure youth drinking
- Why we need brand-level data
 - Product marketing & brand capital
 - Aggregated alcohol data may dilute effects of advertising on youth



Parallels to Youth Tobacco Use

- R.J. Reynolds *Old Joe* Campaign
 - Active 1988-1998
- RJR internal documents suggest product targeted to youth
- Studies: “Joe” very recognizable even to young children
- U.S. FTC & FDA litigation
 - Brand-level research critical to restrictions on tobacco marketing
 - FDA granted domain over tobacco
 - ABRAND inspired by history of tobacco brand research



The ABRAND Project

- Alcohol Brand Research Among Underage Drinkers
- Collaboration between Boston University and Johns Hopkins University Schools of Public Health
- ABRAND project spans four major topic areas:
 1. Price and expenditures
 2. Surveillance and epidemiology
 3. Social and popular media
 4. Advertising and marketing

Methods

- Price and expenditures data
 - Analysis of alcohol vendors' websites
 - Policy research to identify brand-specific price data from both control and license states
- Surveillance and epidemiology
 - Collected via pre-recruited Knowledge Networks, Inc. panel
 - Internet-based survey of 1,031 youth ages 13-20 about use of 898 different alcohol brands and related alcohol behaviors
 - For each alcohol category (vodka, beer, etc.), the respondents indicated which specific brands they consumed during the past 30 days and number of drinks they usually had per brand

Methods, Continued

- Social and popular media
 - Analysis of *Billboard Magazine* year-end charts, 2009-2011
 - Review of Facebook, Twitter, and YouTube websites
- Advertising and marketing: Magazines
 - Nielsen Monitor-Plus
 - Kantar Media (New York, NY)
 - GfK MRI (New York, NY)
- Advertising and marketing: Television
 - ABRAND Internet-based survey, via Knowledge Networks
 - Nielsen advertising data

Myth #1

What they said...

- *It's not possible to survey youth on their brand preferences*



What we found...

- It is both possible and relatively simple
- We surveyed 1000+ youth about their use of 898 different brands
- Survey had median completion time of 16 minutes, and most completed it in less than 20 minutes

Myth #2

What they said...

- *Youth drink whatever they can get—the brand doesn't matter*



What we found...

- Youth drink a consistent, specific set of alcohol brands
- Brands popular among youth include Bud Light, Smirnoff Malt Beverages, Budweiser, and Absolut vodka

Top 10 Youth Brands by Gender

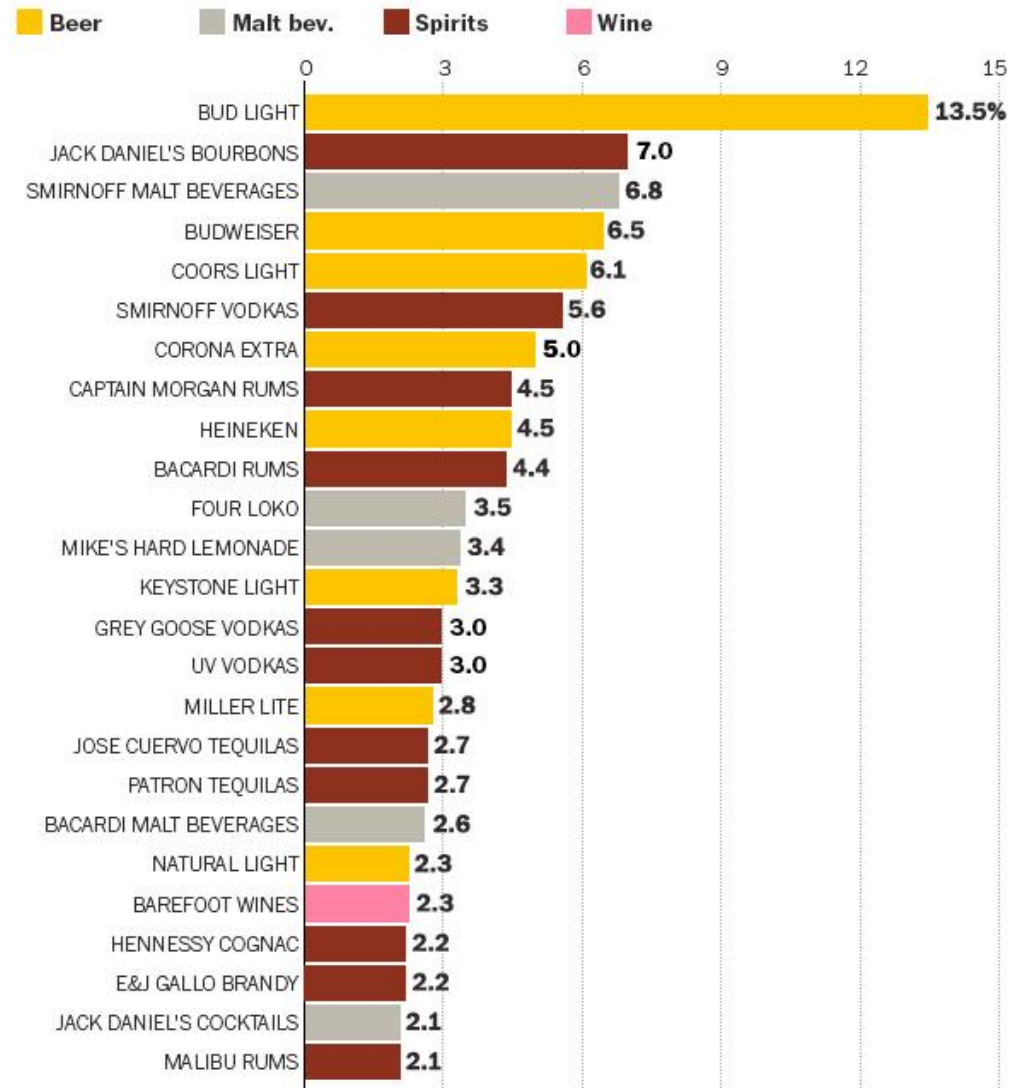
Rank	Male (%)	Female (%)
1	Bud Light (28.1)	Bud Light (27.7)
2	Budweiser (17.0)	Smirnoff Malt Beverages (22.7)
3	Jack Daniels Whiskeys (14.2)	Mikes (14.4)
4	Coors Light (13.7)	Smirnoff Vodkas (13.3)
5	Heineken (13.2)	Bud (12.2)
6	Captain Morgan Rums (13.1)	Coors Light (11.7)
7	Smirnoff Vodkas (12.2)	Absolut Vodkas (11.3)
8	Smirnoff Malt Beverages (11.6)	Corona Extra (11.2)
9	Corona Extra (11.3)	Bacardi Malt Beverages (10.3)
10	Blue Moon (10.2)	Jose Cuervo Tequilas (9.5)

Top 10 Youth Brands by Race/Ethnicity

Non-Hispanic White	Black (%)	Hispanic (%)
Bud Light (26.6%)	Hennessy Cognacs (30.2%)	Bud Light (38.2%)
Coors Light (15.0%)	Smirnoff Malt Beverages (25.7%)	Corona Extra (21.2%)
Budweiser (14.5%)	Ciroc (21.4%)	Smirnoff Malt Beverages (21.1%)
Smirnoff Malt Beverages (13.7%)	Heineken (20.3%)	Budweiser (14.7%)
Smirnoff Vodkas (12.4%)	Bud Light (19.3%)	Heineken (14.6%)
Jack Daniels Whiskeys (11.9%)	1800 Tequilas (18.4%)	Smirnoff Vodkas (13.6%)
Captain Morgan Rums (11.7%)	Budweiser (17.3%)	Bacardi Malt Beverages (13.2%)
Mike's (10.3%)	Seagram's Gins (14.8%)	Jose Cuervo Tequilas (13.1%)
Absolut Vodkas (10.0%)	Jack Daniels Whiskeys (14.7%)	Bacardi Rums (10.1%)
Blue Moon	Mike's (13.5%)	Coors Light (10.1%)

What the kids are binge drinking these days

Percent of 13 to 20-year-olds who reported binge drinking at least once with a particular brand.



SOURCE: "Beverage- and brand-specific binge alcohol consumption among underage youth in the US", Journal of Substance Abuse, May 2014
 GRAPHIC: The Washington Post. Published June 13, 2014

Myth #3

What they said...

- *Youth drink the cheapest brands available*



What we found...

- Only one of the top 25 youth brands (Keystone Light) is among the 88 cheapest brands
- There is more price variation between brands than there is between beverage category (i.e. beer, whiskey, wine)

Myth #4

What they said...

- *Youth drink what is popular among adults*



What we found...

- While there is some overlap with adult preferences, there are specific brands disproportionately preferred by youth
- For example: **Corona Extra Light** (9.3 times more popular); **Bacardi Malt Beverages** (8.0 times), Smirnoff Malt Beverages (6.7 times)

Myth #5

What they said...

- *Youth stick to the classics, like beer*



What we found...

- Youth consume many types of alcoholic beverages, including beer, spirits, FABs, and novelty drinks
- Jello shots and caffeinated alcoholic beverages frequently consumed by youth

Myth #6

What they said...

- *Youth are prevented from seeing alcohol marketing on social networking sites*



What we found...

- Social networking sites can potentially expose youth to myriad pages of alcohol content
- We found over 1,000 company-sponsored alcohol brand sites on Facebook alone
- Age-affirmation tools may not be adequate

Myth #7

What they said...

- *Alcohol ads on TV are targeted at adults, youth exposure is just an unavoidable consequence*



What we found...

- Youth are heavily exposed to brand-specific alcohol advertising in television shows with substantial youth audiences
- Youth were three times more likely to consume a brand if exposed to its television advertising

Myth #8

What they said...

- *Alcohol advertising promotes brand awareness—it doesn't affect what or how much youth drink*



What we found...

- Any exposure to brand-level advertising on TV programs popular among youth is associated with brand-specific consumption
- Male and female youth ages 18-20 are heavily exposed to magazine ads depicting brands preferred by underage drinkers

Conclusions & Future Directions

- We can and should assess youth consumption of specific alcohol brands
- Youth are frequently exposed to brand-level alcohol advertising through television programs and magazines
- These brand preferences are related to brand-specific advertising exposure
- Youth report specific brand preferences that are seemingly unrelated to: 1) adult alcohol preferences, and 2) brand price
- Alcohol advertising content is often easily accessible to underage youth on social networking sites
- Future data collection on youth drinking behavior would benefit from expanding surveys to assess brand consumption
- Such research holds great promise for improving policy approaches to reducing underage drinking

Questions?

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