



Australian Government

Department of Health and Ageing

RESEARCH REPORT

**Australian Alcohol Beverage Advertising in Mainstream Australian
Media 2003 to 2005: Expenditure, Exposure and Related Issues**

October 2005

Elizabeth King
Jenny Taylor
Tom Carroll

- Research and Marketing Group -

Department of Health and Ageing
GPO Box 9848
Sydney NSW 2001
Phone: (02) 9263 3542
Fax: (02) 9263 3549

List of Contents

| | |
|---|-----------|
| EXECUTIVE SUMMARY | 1 |
| 1.0 INTRODUCTION | 4 |
| 2.0 METHODOLOGY | 4 |
| 2.1 Expenditure on alcohol advertising broadcast on mainstream media | 5 |
| 2.2 Exposure to alcohol advertising broadcast on free-to-air metropolitan television..... | 5 |
| 2.3 Subscription television..... | 8 |
| 3.0 RESULTS | 9 |
| 3.1 Expenditure trends | 9 |
| 3.2 Exposure trends | 12 |
| 3.3 Subscription television trends..... | 17 |
| 4.0 DISCUSSION | 22 |
| REFERENCES | 24 |
| APPENDIX 1: MEDIA OUTLETS MONITORED BY NIELSEN MEDIA RESEARCH | 25 |
| APPENDIX 2: CLAUSES FROM THE COMMERCIAL TELEVISION INDUSTRY CODE OF PRACTICE THAT RELATE TO ALCOHOL ADVERTISEMENTS | 30 |

List of Tables

| | | |
|----------|--|----|
| Table 1: | The clauses of the Commercial Television Industry Code of Practice that relate to the placement of alcohol advertisements | 7 |
| Table 2: | Expenditure and exposure for the ten alcohol brands with the greatest metropolitan television expenditure, by beverage category, for Sydney: April 2004 to March 2005 | 13 |
| Table 3: | Expenditure and exposure for the ten alcohol brands with the greatest metropolitan television expenditure, by beverage category, for Melbourne: April 2004 to March 2005 | 15 |
| Table 4: | Alcohol advertisements broadcast on weekends and weekday public holidays, by time of day from April 2004 to April 2005 | 16 |
| Table 5: | Alcohol advertisements broadcast on weekdays, excluding public holidays, by time of day from April 2004 to March 2005 | 17 |

List of Figures

| | | |
|-----------|--|----|
| Figure 1: | Expenditure on alcohol advertising by beverage category: 2003-2004 | 9 |
| Figure 2: | Expenditure on alcohol advertising by beverage type and by month: January 2003-March 2005 | 10 |
| Figure 3: | Expenditure on alcohol advertising by media outlet: 2003-2004..... | 11 |
| Figure 4: | Monthly expenditure on alcohol advertising by media outlet and quarter: January 2003-March 2005 | 12 |
| Figure 5: | The total number of households in Australia and those with access to subscription television (STV): 1997 to 2005 | 18 |
| Figure 6: | The share of television viewing by commercial stations and subscription television (STV), averaged across all metropolitan homes: 1994 to 2005 | 19 |
| Figure 7: | The total number of adolescents in Australia, and those with access to subscription television (STV): 1997 to 2005 | 20 |
| Figure 8: | The average time spent viewing free-to-air (FTA) and subscription television (STV) by adolescents aged 13-17 years: January to July 2005 | 21 |

EXECUTIVE SUMMARY

This report examines the extent of alcohol advertising in mainstream Australian media, and assesses the exposure young people have to this advertising, for those aged younger (13-17 years) and older (18-29 years) than the legal drinking age of 18 years. The report has been written as part of a series of studies reviewing alcohol advertising in Australia, in light of the implementation of the revised Alcohol Beverages Advertising Code (ABAC) on 31 March 2004, and has primarily focused on young people and their response to alcohol advertising.

This report examines data drawn from the Nielsen Media Research syndicated advertising estimated expenditure and media placement service (AdEx), which captures alcohol beverage advertising estimated expenditure in eight channels of mainstream media, excluding subscription television and the Internet. Total expenditure estimations have been based on these data.

In combination with the Nielsen Media Research data, information from Australian Television Audience Measurement (OzTAM) relating to people aged 13-17 years and 18 to 29 years has been included to estimate the potential exposure of these two age groups to alcohol advertising through metropolitan free-to-air television. The potential for exposure to alcohol advertising has been assessed and reported using Target Audience Rating Points (TARPs), which provide scores representing the reach and frequency of alcohol advertising with a designated demographic group. The time of day that alcohol advertisements were placed on metropolitan television has also been examined, with reference to the time frames designated in the Commercial Television Industry Code of Practice.

Trends in the uptake of subscription television have also been included in this report, with particular reference to adolescents.

Expenditure on alcohol advertising

Estimated expenditure on alcohol beverage advertising in the mainstream media in Australia over recent years has reached more than \$100 million per annum, and represents close to half of all estimated expenditure on beverage advertising. Among all alcohol beverage categories, estimated advertising expenditure has been greatest for beer, accounting for close to half of all alcohol advertising expenditure. Metropolitan free-to-air television represented the greatest proportion of estimated advertising expenditure, also accounting for approximately half of all estimated expenditure in 2003 and 2004. The seasonal variation in alcohol advertising results in peaks in alcohol advertising expenditure occurring in the months leading up to the end of the calendar year.

Young people's exposure to alcohol advertising on free-to-air metropolitan television

Young people's exposure to alcohol advertising on metropolitan free-to-air television has been assessed in this report in two ways. The first involved the examination of the weight of alcohol advertising exposure (measured in TARPs) attained for 13-17 year olds and 18 to 29 year olds for the top ten alcohol brands within the beverage categories of beer, spirits/pre-mix and wine, for the period of April 2004 to March 2005. The Sydney and Melbourne metropolitan free-to-air television markets were examined, as these two locations represent the largest metropolitan television free-to-air markets in Australia.

Using this approach it was found that the weight of potential alcohol advertising exposure to 13-17 year olds across all beverage categories in the Sydney and Melbourne metropolitan television market were similar to, but in most cases less than, the weight of exposure to 18 to 29 year olds. For some alcohol beverage brands, the weight of advertising exposure to 13-17 year olds was found to be greater than that for 18 to 29 year olds over this twelve month period. Examples of equal or greater exposure to 13-17 year olds than to 18 to 29 year olds were found across all alcohol beverage categories.

The second method of examining potential exposure to alcohol advertising on metropolitan free-to-air television was based on exploring the time of day alcohol advertisements were shown on television, following the guidelines for broadcasting outlined in the Commercial Television Industry Code of Practice. The Code allows for alcohol advertising to be shown on weekends and public holidays between 8:30pm and 5am, and on weekdays from 12noon to 3pm and 8:30pm to 5am. The exception, for both weekdays and weekends, relates to the allowance of alcohol advertising as an accompaniment to a "live" sporting broadcast, shown at any time of day.

During the period of April 2004 to March 2005, 34,830 alcohol advertisements were screened in five metropolitan television markets (i.e. Adelaide, Brisbane, Melbourne, Perth, Sydney). Three-fifths of this alcohol advertising was broadcast on weekdays (excl. public holidays), primarily after 8:30pm, and the remaining two-fifths was placed in weekend and public holiday programming. Thirty-eight per cent of alcohol advertising broadcast on weekend and public holidays was shown between 5am and 8:30pm, reflecting the placement of alcohol advertising alongside "live" sporting programs.

Subscription television

While the Alcohol Beverage Advertising Code (ABAC) has been adopted by subscription television with respect to the content of alcohol advertisements and the management of complaints, guidelines regarding the scheduling and placement of alcohol advertisements appear to be less clearly defined. No data is available regarding the scheduling of alcohol advertisements, the channels upon which alcohol advertisements are placed, or any other on-air promotions or partnerships that may have been established with alcohol brands. The only data available indicates that there has been substantial growth in the proportion of Australian households with access to subscription television.

When subscription television was launched in Australia in 1995, 85,000 homes were connected. In 2005, 1.7 million households were connected, representing approximately one quarter of the Australian population. The proportion of adolescents aged 13-17 years with access to subscription television has increased from 11 per cent in 1997 to 32 per cent in 2005. With respect to viewing behaviour, adolescents living in households with subscription television spend more time on average watching television, and a greater proportion of this time is spent watching subscription television than free-to-air television.

1.0 INTRODUCTION

Following a review of the Alcohol Beverages Advertising Code (ABAC) commissioned by the Ministerial Council on Drug Strategy, a series of recommendations were made regarding the self-regulatory system. Four research projects were undertaken by the Australian Government to investigate various aspects of alcohol beverage advertising following the 31 March, 2004 implementation date for the revised ABAC.

This report examines the amount and type of alcohol advertising, across the main media from April 2004 to March 2005, and also examines the weight of exposure to metropolitan free-to-air television for young people aged 13 to 29 years. An investigation of the uptake of subscription television and viewing habits for young people is also included.

Previous research shows that estimated expenditure on alcohol advertising has increased. Between 1991 and 1995 annual estimated expenditure on alcohol advertising increased from \$29.7 million to \$56.6 million¹. This research also indicated that 13-17 year olds were experiencing comparatively high levels of exposure to alcohol advertising when compared to the adult population. In particular, for some spirit brands, the potential advertising exposure levels were greater for adolescents than for the adult population.

Exposure to alcohol advertising is monitored most closely in the metropolitan free-to-air television market. Basic information regarding the uptake of subscription television by Australian households has been included in this report to illustrate growth in potential audiences for this media in Australia. While subscription television was introduced in 1995, data regarding household uptake and the potential exposure adolescents have to this media is available from 1997 to 2005. There is, however, no information currently available regarding the type or amount of alcohol beverage advertisements broadcast on subscription television, nor the placement of alcohol advertising by program or channel.

2.0 METHODOLOGY

The Australian Government Department of Health and Ageing purchased access to the Beverages-Alcoholic category of the syndicated advertising expenditure (estimated) and media placement service (AdEx) from Nielsen Media Research, for the period of January 2003 to March 2005. An end date of 31 March 2005 was chosen to allow for a full 12 months of alcohol advertising monitoring following the implementation date (31 March 2004) for the revised ABAC.

AdEx is an expenditure estimation and media placement verification service utilised by advertisers, media outlets and advertising agencies. The service has been in place within the Australian market since 1991. The AdEx service covers seven main media sources:

- Metropolitan free-to-air Television (MTV),
- Regional free-to-air Television (RTV),
- National and Metropolitan Newspapers (MPress),
- Regional Newspapers (RPress),
- Metropolitan Radio
- Major Metropolitan Cinema and
- Major Metropolitan Outdoor (please refer to Appendix 1 for detailed description of all the outlets monitored).

Alcohol advertising expenditure and exposure data were the two types of information captured from this database.

2.1 Expenditure on alcohol advertising broadcast on mainstream media

Expenditure for all media is estimated using a combination of market rate cards, market intelligence and discount factors. The expenditure estimates account for the different market factors that contribute to establishing a rate for an advertisement. The market influences accounted for include: individual client volume spend, buying strengths of the agencies and seasonal market demand. These factors allow for a relative view of the market place, and aims to be within +/- 10% of actual advertising expenditure.

Advertising expenditure estimates for metropolitan television are monitored using both visual verification and station log information. All metropolitan commercial stations are videotaped 24 hours per day, 7 days per week. Metropolitan television station logs are cross-verified with video taped station activity for each individual advertisement, and then advertiser, product and agency links are created. The advertisement is then categorised and entered into the database.

Metropolitan radio is processed from daily logs. Nielsen Media Research either confirms or creates advertiser, product and agency links and this information is then categorised before being entered into the database.

Alcohol advertising estimated expenditure data, through mainstream media, was monitored from January 2003 through to March 2005. Estimated expenditure summaries are provided as raw data, and have not been adjusted relative to the consumer price index.

2.2 Exposure to alcohol advertising broadcast on free-to-air metropolitan television

Australian Television Audience Measurement data

Exposure to alcohol advertising is provided by Australian Television Audience Measurement (OzTAM), which provides free-to-air television audience information according to the demographics of the viewer and the programs selected for viewing. It is based on a 'peplemeter' device installed on the TV sets of the panel homes, where the time of day, the television station being viewed and the person(s) viewing

the program are monitored. For the purpose of this study data from peplemeters relating to 13-17 years and 18 to 29 years were used to estimate the potential exposure these two age groups had to alcohol advertising through metropolitan free-to-air television, for the twelve month period following the implementation date for the revised ABAC (ie 1st April 2004-31 March 2005).

The potential for exposure to alcohol advertising has been assessed and reported using Target Audience Rating Points (TARPs), which indicate the potential weight of exposure to advertising. A TARP measure provides an indication of the proportion of a specific demographic group who are potentially exposed to a television advertisement. It is a measure of the proportion of the designated target demographic group who are watching a particular program, and how many times they are potentially exposed to an advertisement placed during that program. This results in an assessment of the weight of alcohol advertising exposure for that age group in a particular metropolitan television market.

A TARP is a percentage expression with one rating point representing potential exposure to one per cent of a particular demographic group. TARP data are collected for each quarter hour period during the day. If for instance, ten per cent of 13-17 year olds, in a particular metropolitan television market, were watching a certain television program and an advertiser bought one spot in that program during that quarter hour period, this would yield a weight of ten TARPs against 13-17 year olds. And if ten per cent of 13-17 year olds were watching the program while the advertiser bought two spots in that quarter hour period, this would yield a weight of twice that amount, i.e. twenty TARPs. Thus, the TARP weight of advertising exposure delivered against a designated demographic group is a product of the 'reach' of that exposure (i.e. the proportion of people who saw the advertisement) by the 'frequency' of the exposure (i.e. the number of times people potentially saw it).

With respect to metropolitan TV, the exposure (TARP) findings shown in this report reflect two demographic groups: adolescents aged 13-17 years and young adults aged 18 to 29 years who viewed free-to-air television in Sydney and Melbourne. Since the greatest proportion of media spend is invested in metropolitan television, and Sydney and Melbourne represent the two largest markets for metropolitan television, data from these capital cities has been selected for this report.

The Commercial Television Industry Code of Practice

The Commercial Television Industry Code of Practice² (CTICP) covers matters relating to program content that are of concern to the community, including the time of advertising on television. The Code operates alongside the Australian Communications and Media Authority which regulates programs for children and the Australian content of programs and advertisements. Table 1 shows the clauses of the CTICP that guide placement of alcohol advertising on free-to-air television. A full summary of the clauses of the CTICP that relate to alcohol advertising is shown at Appendix 2.

Table 1: The clauses of the Commercial Television Industry Code of Practice that relate to the placement of alcohol advertisements

| | | |
|---|---|--|
| Clause 6.7: | Clause 2.10, 2.11 & 2.12 | |
| A commercial which is a “direct advertisement for alcoholic drinks” may be broadcast: | The M classification zones are shown (including MA & AV classification zones) | |
| | <u>Weekdays (school days)</u> | <u>Weekdays & weekends (school holidays)</u> |
| <ul style="list-style-type: none"> ▪ Only in M, MA, or AV classification periods. | 8:30pm-5am & 12 noon-3pm | 8:30pm-5am |
| <ul style="list-style-type: none"> ▪ As an accompaniment to the live broadcast of a sporting event on weekends and public holidays. | | |
| Clause 6.8: | | |
| Notwithstanding the above (ie Clause 6.7), a commercial which is a “direct advertisement for alcoholic drinks” may be broadcast as an accompaniment to the live broadcast of a sporting event if: | | |
| <ul style="list-style-type: none"> ▪ The sporting event is broadcast simultaneously across a number of licence areas; and ▪ Clause 6.7 permits direct advertisements for alcoholic drinks in the licence area in which the event is held or, if the event is held outside of Australia, direct advertisements for alcoholic drinks are permitted in a majority of the metropolitan licence areas in which the event is simulcast. | | |

From Clause 6.7 it can be seen that alcohol advertisements can be broadcast alongside programs classified as M, MA and AV, which can be shown on weekdays from 8:30pm to 5am and from 12noon to 3pm. On weekends and school holidays the classification period for these programs is from 8:30pm-5am. Clause 6.7 also states that alcohol advertisements can accompany the live broadcasting of a sporting event at any time on weekends and public holidays.

An exception to the time frames guiding alcohol advertising placement is shown in clause 6.8 where alcohol advertisements can be broadcast, at any time of day, whenever the live broadcasting of a sporting event is shown. Clause 6.12 defines a “live sporting” event as:

| |
|---|
| <ul style="list-style-type: none"> ▪ live-to-air sporting broadcasts, including breaks immediately before and after the broadcast; ▪ sporting broadcasts delayed for time zone reasons and broadcast as plausible “live”, without reformatting; ▪ sporting broadcasts delayed in the licence area in which the event is being held pursuant to a requirement of the relevant sporting organisation (known in the industry as “delayed against the gate”); and ▪ replay material where a scheduled live-to-air sporting broadcast has been temporarily suspended (eg during rain breaks in cricket coverage), provided that normal or stand-by programs have not been resumed. |
|---|

Using these definitions as a guide, alcohol advertisements shown on metropolitan free-to-air metropolitan television were analysed according to the time of day they were shown and whether they were shown on a weekday, weekend or public holiday.

An assessment of when alcohol advertisements are shown by time of day was included in this research to identify trends in when alcohol advertisements are shown, while recognising that greater day time placement of alcohol advertising would increase the potential for youth to be exposed to these advertisements.

Public holidays were grouped with weekends, since the time frames guiding alcohol advertisement broadcasting were the same. The five free-to-air markets monitored by

Nielsen Media Research which were analysed in this report were Adelaide, Brisbane, Melbourne, Perth and Sydney. Alcohol advertisements broadcast on these metropolitan television stations were monitored by quarter from April 2004 to March 2005.

2.3 Subscription television

The uptake of subscription television in Australia

The number of households that have connected to subscription television is monitored and viewing information is available through OzTAM, which was then provided to the authors through the multi channel network (mcⁿ) from 1997 to the present. This information includes the number of households with subscription television, the number of adolescents 13-17 years with access to subscription television, and the proportion of time adolescents spend viewing free-to-air and subscription television. Currently no data is available to indicate alcohol advertising expenditure or media placement on subscription television.

Regulations affecting alcohol advertising on subscription television

When subscription television was first introduced in Australia in 1995, there was a ban on advertising until 1 July 1997. Since that time advertising on subscription television has been allowed. The revised Australian Subscription Television and Radio Association (ASTRA) Subscription Broadcast Television Code of Practice³ (July 2003) provides guidelines regarding the content and scheduling of alcohol advertisements, based on the Alcohol Beverage Advertising Code (ABAC).

With respect to the content of alcohol advertisements, Section 6.1(a) of the ASTRA Code of Practice states that:

“Licensees must, to the extent applicable, ensure advertisements promoting goods or services defined in the ... Alcohol Beverages Advertising Code ... comply with (those) Codes and must refer any specific complaints relating to these types of advertisements to the body administering those Codes”.

With respect to the scheduling of alcohol advertisements, Section 6.5(a) of the ASTRA Code states that:

“The licensee must take into account the intellectual and emotional maturity of its intended audience when scheduling advertisements in the (Advertising of Alcoholic Beverages) category”.

To the knowledge of the authors of this report, restrictions on the types of programs and respective times within which alcohol advertisements can be shown, such as the prescriptive frameworks provided in the Commercial Television Industry Code of Practice for free-to-air television, do not exist for subscription television broadcasting.

3.0 RESULTS

The results section of this report examines the following issues:

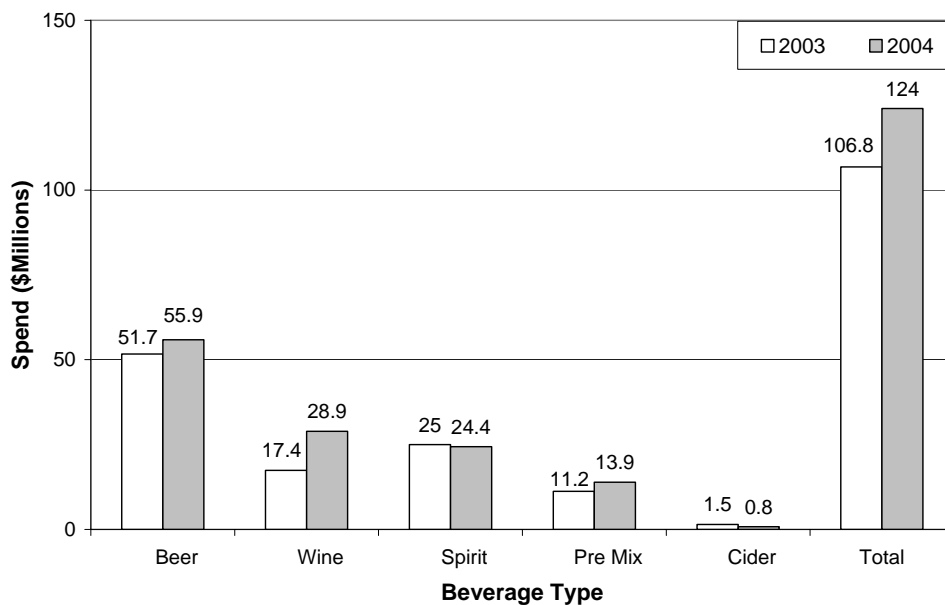
- Section 3.1: Expenditure on alcohol advertising in mainstream media in Australia, by beverage type and media type from January 2003 to March 2005
- Section 3.2: Exposure to alcohol advertising on metropolitan television for adolescents 13-17 years and young adults 18 to 29 years from April 2004 to March 2005
- Section 3.3: Exposure to subscription television in Australia, and for adolescents aged 13-17 years from 1997 to 2005

3.1 Expenditure trends

In Australia the total estimated expenditure on advertising, provided by Nielsen Media Research across all industry categories, was \$6.6 billion during 2003 and \$7.6 billion during 2004. The advertising of beverages, across all beverage categories, accounted for approximately 3 per cent of that expenditure (\$237M in 2003 and \$254M in 2004).

Total alcohol advertising expenditure was estimated to be \$107 million in 2003 and \$124 million in 2004, representing 45 and 49 per cent of estimated beverage expenditure in those years respectively. When compared to the total alcohol advertising expenditure in the mid 1990's, where expenditure in 1995 was estimated at \$56.6 million¹, annual estimated expenditure has increased significantly. Figure 1 shows expenditure on alcohol advertising by beverage category.

Figure 1: Expenditure on alcohol advertising by beverage category: 2003-2004



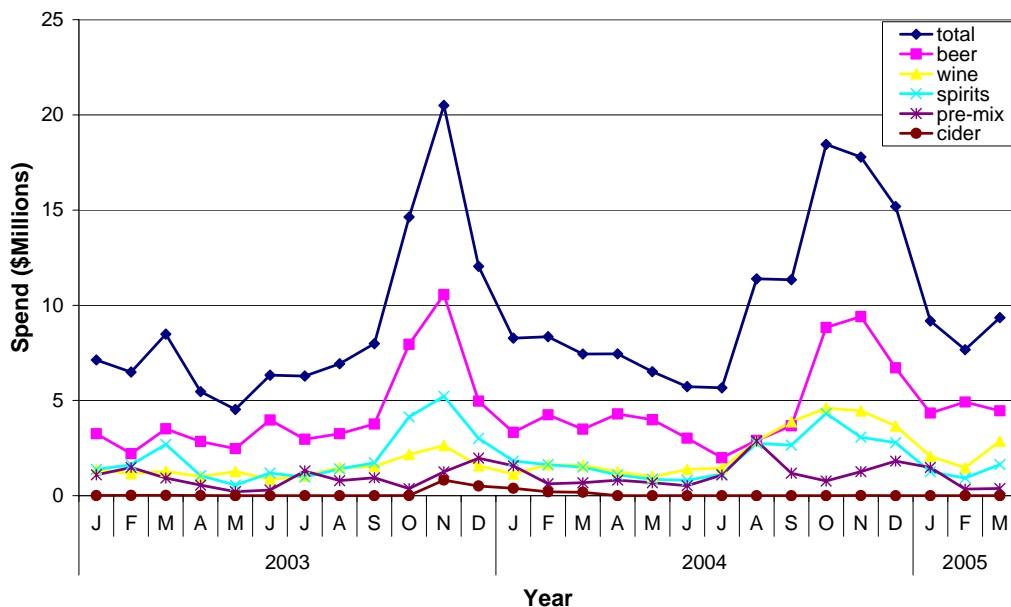
Source: Nielsen Media Research

Figure 1 shows the total estimated advertising expenditure for alcohol beverages during 2003 and 2004, by beverage category. It can be seen that in 2004 \$56 million was spent on beer advertising, \$29 million on wine, \$24 million on spirits, \$14 million on pre-mix beverages and close to \$1 million on ciders. Estimated expenditure on wine increased from \$17.4 million in 2003 to \$28.9 million in 2004.

Total alcohol advertising estimated expenditure in quarter 1 of 2005 (\$26.2M) was similar to that seen during the same time period in 2003 (\$22M) and 2004 (\$24.1M). The beverage category with the greatest estimated expenditure during the first quarter was beer (2003: \$8.9M; 2004: \$11M; 2005: \$13.7M).

Estimated alcohol expenditure by beverage type and by month from January 2003 to March 2005 is shown in Figure 2.

Figure 2: Expenditure on alcohol advertising by beverage type and by month: January 2003-March 2005



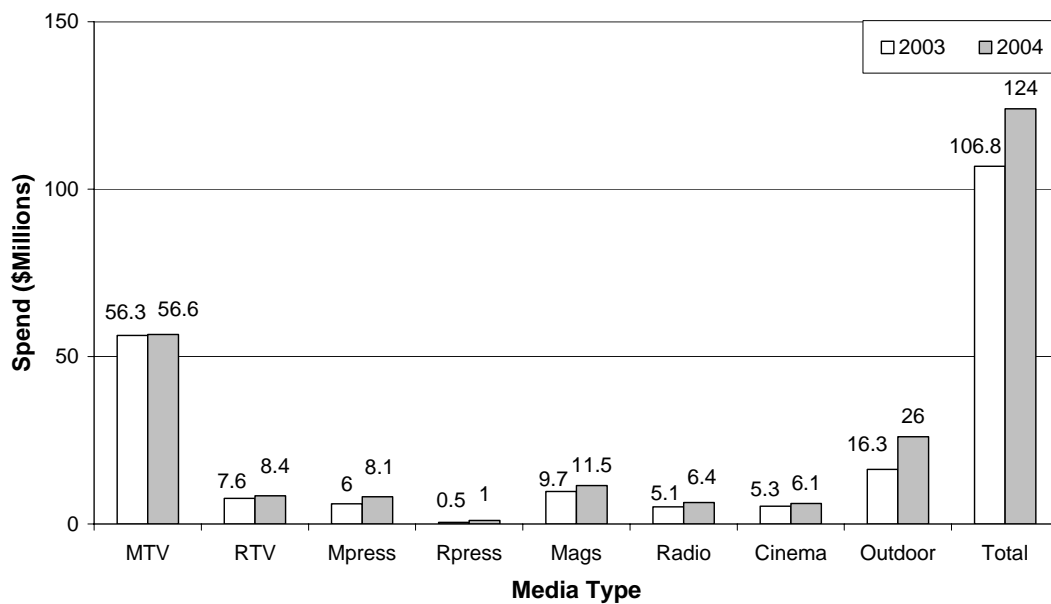
Source: Nielsen Media Research

Figure 2 shows estimated advertising expenditure for alcohol beverages by beverage category and by month from January 2003 to March 2005. The seasonal pattern of total alcohol expenditure across the year is evident, with relatively lower expenditure in the first three quarters of the year, followed by a large increase in expenditure in the final quarter of the year. Trends in estimated expenditure for beer reflect the seasonal trends observed in total estimated expenditure, while spirit and wine expenditure estimates reflect these trends to a lesser extent. Trends in pre-mix spirit and liqueur advertising follows the typical pattern, with two advertising peaks in December 2003 and 2004, but also a peak in August 2004. Cider advertising was minimal over this time period, reflecting relatively lower expenditure levels in general.

Figure 3 shows estimated alcohol advertising expenditure by media outlet. It can be seen that in 2003 and 2004 at least \$56 million was spent on alcohol advertising on

metropolitan television (MTV) per annum, representing more than 45 per cent of total estimated alcohol advertising expenditure for each year. Approximately \$16 million was spent on outdoor advertising in 2003, increasing to \$26 million in 2004ⁱ. Alcohol advertising in magazines was approximately \$12 million in 2004, while advertising in regional television (RTV) and in the metropolitan press (Mpress) were both \$8 million. Estimated alcohol advertising expenditure on the radio and cinemas in 2004 was \$6 million per annum, while estimated expenditure in the regional press (Rpress) was \$1 million.

Figure 3: Expenditure on alcohol advertising by media outlet: 2003-2004



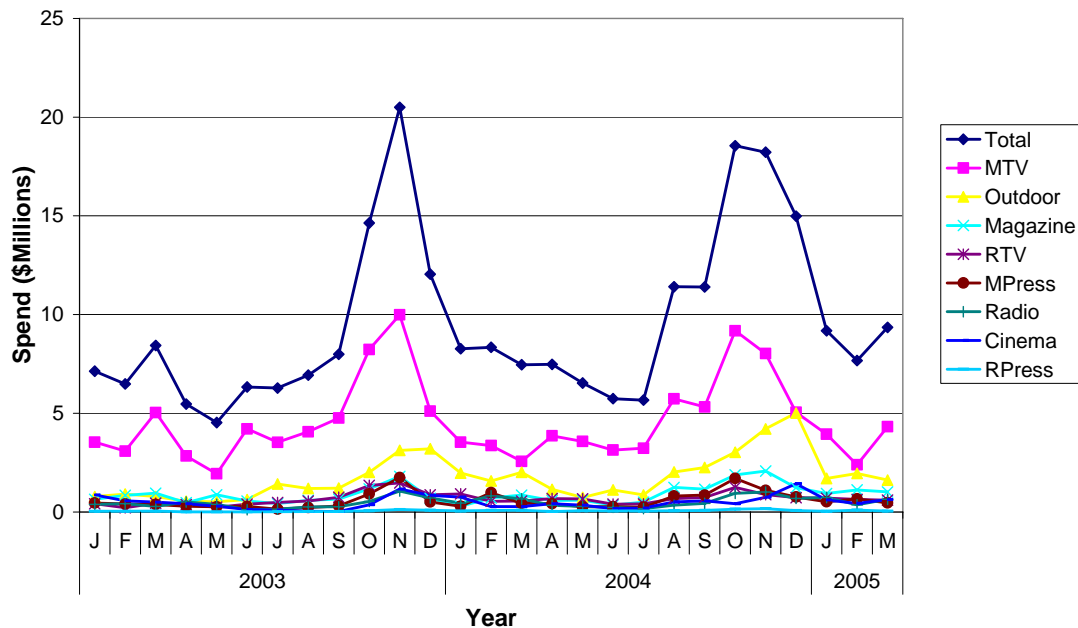
Source: Nielsen Media Research

Estimated alcohol advertising expenditure during quarter 1 of 2005 reflected a similar pattern to that seen during the same period in 2003 and 2004.

Figure 4 shows estimated monthly advertising expenditure for alcoholic beverages by media from January 2003 to March 2005.

ⁱ In 2004 Nielsen Media Research included more outdoor advertising sites to the total number of outdoor sites monitored, which would influence this increase.

Figure 4: Monthly expenditure on alcohol advertising by media outlet and quarter: January 2003-March 2005



Source: Nielsen Media Research

It can be seen that metropolitan television (MTV) has consistently accounted for the greatest estimated expenditure each month, with peaks in the months of October and November in 2003 and 2004. Outdoor media represented the second greatest estimated alcohol advertising expenditure, with peaks in November and December 2004. Estimated alcohol advertising expenditure in magazines peaked at \$2 million in November 2004, and advertising expenditure for metropolitan press (MPress) was at its highest in November 2003 and October 2004.

3.2 Exposure trends

The potential for exposure to alcohol advertising on free-to-air television has been examined in this report using two methods of data capture. The first method is based on an analysis of exposure of young people aged 13 to 29 years to particular alcohol brand advertisements on free-to-air television. The second method is based on the proportion of alcohol advertisements shown in particular time slots of weekday and weekend viewing, to determine the proportion of alcohol advertisements shown during different times of the day.

Young people's exposure to alcohol advertisements

The weight of exposure to alcohol advertising has been estimated using target audience rating point (TARP) data, indicating the potential exposure 13-17 year olds and 18-29 year olds, living in the Sydney and Melbourne metropolitan television markets, have had to an advertisement.

Tables 2 and 3 present the number of alcohol advertisements shown for the ten brands within the three beverage categories with the greatest estimated metropolitan television expenditure over the twelve month time period. The tables also show estimated advertising expenditure by brand within the metropolitan television (MTV) market, the weight of alcohol advertising exposure (TARPs), and the relative exposure adolescents 13-17 years and people 18-29 years have had to the advertisement. The data covers the period April 2004 to March 2005, and the tables show the Sydney and Melbourne markets separately.

While it is important to consider the total estimated expenditure and total TARPs generated, the relative exposure index provides an insight into the comparative degree of exposure to alcohol beverage advertising for 13-17 year olds compared to 18 to 29 year olds.

Table 2 shows the estimated advertising expenditure and exposure data for the ten beer, spirits and wine brands with the greatest estimated advertising expenditure in the metropolitan television market in Sydney between April 2004 and March 2005.

Table 2: Expenditure and exposure for the ten alcohol brands with the greatest metropolitan television expenditure, by beverage category, for Sydney: April 2004 to March 2005

| Sydney Quarter 2 2004 - Quarter 1 2005 | | Estimated Expenditure | Weight of advertising exposure (TARPs) | | Relative Exposure (13-17/18-29) |
|---|-------|--------------------------|---|-------|---------------------------------------|
| Brand advertised on MTV | Tally | | 13-17 | 18-29 | |
| Beer | | | | | |
| Tooheys New | 758 | \$2,310,000 | 2,741 | 3,209 | 0.85 |
| Carlton Draught | 531 | \$1,220,000 | 1,349 | 1,548 | 0.87 |
| Carlton Crown | 254 | \$1,142,000 | 1,086 | 1,232 | 0.88 |
| Victoria Bitter | 599 | \$1,106,000 | 1,140 | 1,310 | 0.87 |
| Hahn Premium Light | 281 | \$813,000 | 1,162 | 1,382 | 0.84 |
| Boags Premium Lager | 63 | \$704,000 | 208 | 236 | 0.88 |
| Boags Draught | 118 | \$606,000 | 355 | 471 | 0.75 |
| Guinness Draught | 198 | \$572,000 | 488 | 726 | 0.67 |
| Becks Beer | 141 | \$563,000 | 540 | 550 | 0.98 |
| Corona Extra | 157 | \$556,000 | 661 | 703 | 0.94 |
| Spirits | | | | | |
| Bundaberg Rum | 424 | \$1,010,000 | 1,074 | 1,152 | 0.93 |
| Baileys Liqueur | 215 | \$841,000 | 1,072 | 1,195 | 0.90 |
| Cougar & Cola Bourbon | 145 | \$715,000 | 562 | 706 | 0.80 |
| Smirnoff Ice | 252 | \$685,000 | 1,366 | 1,449 | 0.94 |
| Bundaberg Rum Dry & Lime Mix | 184 | \$640,000 | 758 | 731 | 1.04 |
| Johnnie Walker White & Cola | 139 | \$515,000 | 525 | 552 | 0.95 |
| Archers Spri Schnapps | 123 | \$417,000 | 659 | 870 | 0.76 |
| Bundaberg Rum & Cola | 59 | \$372,000 | 391 | 393 | 0.99 |
| Frangelico Liqueur | 80 | \$277,000 | 338 | 433 | 0.78 |
| Jim Beam White Label | 40 | \$275,000 | 154 | 169 | 0.91 |
| Wine | | | | | |
| Wolf Blass Wine | 413 | \$795,000 | 923 | 1,297 | 0.71 |
| Rosemount Estate Diamond Label | 179 | \$720,000 | 641 | 705 | 0.91 |
| Wyndham Estate Bin 555 Shiraz | 190 | \$593,000 | 462 | 569 | 0.81 |
| Half Mile Creek Wines | 119 | \$516,000 | 466 | 571 | 0.82 |
| Lindemans Wines | 125 | \$408,000 | 621 | 722 | 0.86 |
| Hardys Wines | 89 | \$395,000 | 244 | 357 | 0.68 |
| Brown Brothers Moscato | 162 | \$190,000 | 362 | 384 | 0.94 |
| Wolf Blass Chardonnay | 30 | \$143,000 | 200 | 200 | 1.00 |
| Wolf Blass Cabernet Sauvignon | 74 | \$125,000 | 124 | 244 | 0.51 |
| Orlando Jacobs Creek Sparkling Rose | 41 | \$120,000 | 105 | 139 | 0.76 |

Source: Nielsen Media Research and OzTAM

From Table 2 it can be seen that, when comparing estimated expenditure by beverage category within the Sydney metropolitan television market, the top four beer brands account for the greatest number of advertisements and the greatest estimated expenditure. The brands where over \$1 million dollars had been invested in advertising over the 12 month period were Tooheys New, Carlton Draught, Carlton Crown, Victoria Bitter and Bundaberg Rum. All of the ten beer brands ranked with the greatest estimated expenditure invested at least \$500,000 in advertising, while six of the spirits brands and four of the wine brands had done so.

The weight of exposure to advertising for 13-17 and 18-29 year olds was greatest for five beer brands (Tooheys New, Carlton Draught, Carlton Crown, Victoria Bitter & Hahn Premium Light), three spirit brands (Bundaberg Rum, Baileys Liqueur & Smirnoff Ice) and one wine brand (Wolf Blass wine), all of which generated at least 1,000 TARPs over the time period (excluding Wolf Blass wine with 13-17 year olds).

The relative exposure index shows that, for all but two brands, a greater weight of exposure was generated with those aged 18-29 years when compared to those 13-17 years (ie a rating of less than one). The two brands with advertising that generated greater or equal relative exposure were Bundaberg Rum Dry & Lime Mix (1.04) and Wolf Blass chardonnay (1.00). A total of twelve brands generated exposure with 13-17 year olds that represented at least 90 per cent of the exposure generated with 18-29 year olds (Becks beer, Corona Extra, Bundaberg Rum, Baileys Liqueur, Smirnoff Ice, Bundaberg Rum Dry & Lime Mix, Johnnie Walker White & Cola, Bundaberg Rum & Cola, Jim Beam White Label, Rosemount Estate, Brown Brothers Moscato and Wolf Blass Chardonnay).

Table 3 shows estimated expenditure and exposure data for the top ten beer, spirit and wine brands in the Melbourne metropolitan television market.

Table 3: Expenditure and exposure for the ten alcohol brands with the greatest metropolitan television expenditure, by beverage category, for Melbourne: April 2004 to March 2005

| Melbourne Quarter 2 2004 - Quarter 1 2005 | | Estimated Expenditure | Weight of advertising exposure (TARPs) | | Relative Exposure (13-17/18-29) |
|--|-------|--------------------------|--|-------|---------------------------------------|
| Brand advertised | Tally | | 13-17 | 18-29 | |
| Beer | | | | | |
| Carlton Crown | 164 | \$706,000 | 723 | 977 | 0.74 |
| Victoria Bitter | 334 | \$697,000 | 717 | 927 | 0.77 |
| Boags Draught | 140 | \$609,000 | 506 | 605 | 0.84 |
| Boags Premium Lager | 68 | \$596,000 | 262 | 277 | 0.95 |
| Guinness Draught | 205 | \$584,000 | 796 | 802 | 0.99 |
| Carlton Sterling | 106 | \$581,000 | 709 | 749 | 0.95 |
| Hahn Premium Light | 191 | \$568,000 | 919 | 1,007 | 0.91 |
| Becks Beer | 133 | \$421,000 | 412 | 541 | 0.76 |
| Tooheys Extra Dry | 116 | \$413,000 | 592 | 603 | 0.98 |
| Heineken Lager | 110 | \$394,000 | 594 | 530 | 1.12 |
| Spirits | | | | | |
| Cougar & Cola Bourbon | 170 | \$788,000 | 838 | 910 | 0.92 |
| Baileys Liqueur | 203 | \$723,000 | 1,301 | 1,317 | 0.99 |
| Johnnie Walker White & Cola | 155 | \$547,000 | 467 | 737 | 0.63 |
| Smirnoff Ice | 197 | \$460,000 | 1,340 | 1,417 | 0.95 |
| Cougar Bourbon | 103 | \$445,000 | 755 | 729 | 1.04 |
| Archers Spri Schnapps | 110 | \$357,000 | 889 | 852 | 1.04 |
| Jim Beam White Label | 35 | \$242,000 | 183 | 184 | 0.99 |
| Bundaberg Rum Dry & Lime Mix | 88 | \$236,000 | 397 | 376 | 1.06 |
| Bundaberg Rum | 175 | \$203,000 | 312 | 333 | 0.94 |
| Wild Turkey Bourbon | 50 | \$131,000 | 235 | 295 | 0.80 |
| Wine | | | | | |
| Wolf Blass Wine | 380 | \$677,000 | 1,211 | 1,223 | 0.99 |
| Wyndham Estate Bin 555 Shiraz | 171 | \$533,000 | 691 | 657 | 1.05 |
| Rosemount Estate Diamond Label | 147 | \$523,000 | 738 | 702 | 1.05 |
| Half Mile Creek Wines | 115 | \$434,000 | 597 | 624 | 0.96 |
| Lindemans Wines | 122 | \$338,000 | 757 | 764 | 0.99 |
| Hardys Wines | 72 | \$327,000 | 357 | 385 | 0.93 |
| Orlando Jacobs Creek Sparkling Rose | 34 | \$89,000 | 177 | 160 | 1.11 |
| Wolf Blass Cabernet Sauvignon | 52 | \$77,000 | 155 | 148 | 1.05 |
| Wolf Blass Chardonnay | 42 | \$71,000 | 91 | 110 | 0.83 |
| Koala Blue Wines | 74 | \$59,000 | 92 | 125 | 0.74 |

Source: Nielsen Media Research and OzTAM

Compared to the Sydney metropolitan television market, in Melbourne there were considerably fewer advertisements broadcast, and less advertising expenditure and weight of exposure, particularly for the beer brands. The greatest estimated expenditure on metropolitan television for a beer brand was \$706,000 for Carlton Crown, and the lowest was \$394,000 for Heineken, with seven of the ten brands expending at least half a million dollars on advertising. Two spirit brands had greater estimated advertising expenditure than Carlton Crown, the beer brand with the greatest estimated advertising expenditure over the time period (Cougar & Cola, \$788,000 and Baileys Liqueur \$723,000). Three of the spirit brands and three wine brands expended more than half a million dollars (Cougar & Cola, Baileys, Johnnie Walker White & Cola, Wolf Blass, Wyndham Estate and Rosemount) in this television market.

The weight of exposure to advertising for 13-17 and 18-29 year olds was greatest for Baileys Liqueur, Smirnoff Ice and Wolf Blass wine, all of which generated at least 1,000 TARPs for both age groups over the time period. Hahn Premium Light

generated the greatest number of TARPs in the beer category (13-17: 919, 18-29: 1007).

Relative exposure to alcohol advertising, comparing those aged 13-17 years and 18-29 years, shows that for the majority of brands a greater weight of exposure was generated with those aged 18-29 years. However, eight of the thirty top spend brands shown in Melbourne generated greater exposure with 13-17 year olds (Heineken 1.12, Cougar Bourbon 1.04, Archers Spri 1.04, Bundaberg Rum Dry & Lime mix 1.06, Wyndham Estate 1.05, Rosemount Estate 1.05, Orlando Jacobs Creek 1.11 and Wolf Blass Cabernet Sauvignon 1.05). A total of twenty-two brands generated exposure to 13-17 year olds that represented at least 90 per cent of the exposure with 18-29 year olds in this market.

Alcohol advertisement placement by day of week and time of day

The Commercial Television Industry Code of Practice (CTICP) represents the framework within which alcohol advertising can be placed on free-to-air television. As outlined earlier, alcohol advertisements can be broadcast on weekdays (school days) from 8:30pm to 5am and from 12noon to 3pm, and on weekends, school holidays and public holidays from 8:30pm to 5am. Alcohol advertisements can also be broadcast at any time of day on any day of the week as an accompaniment to a “live” sporting event, providing certain criteria are met (detailed in Clause 6.8 of the Code, shown in Table 1).

During the period of April 2004 to March 2005, 34,830 alcohol advertisements were screened in five metropolitan television markets (i.e. Adelaide, Brisbane, Melbourne, Perth, Sydney), with 14,693 (42%) advertisements shown on weekends and public holidays, and the remaining 20,137 (58%) advertisements shown on weekdays.

Of all alcohol advertising broadcast across weekdays, weekends and public holidays, a total of 81 per cent of advertisements were shown during the evening time slot of 8:30pm to 5am, while the remaining 19 per cent of alcohol advertisements were shown during the daytime hours of 5am to 8:30pm. Tables 4 and 5 show the placements of alcohol advertisements by time of day for weekends and public holidays, and on weekdays.

Weekends and public holidays

The number and proportion of alcoholic beverage advertisements shown by time of day during weekends and public holidays is shown in table 4.

Table 4: Alcohol advertisements broadcast on weekends and weekday public holidays, by time of day from April 2004 to April 2005

| Weekend & public hol alcohol advertising placements | 2004 | | | | | | 2005 | | Total | |
|---|--------------|-------------|--------------|-------------|--------------|-------------|--------------|-------------|---------------|-------------|
| | Apr-Jun | | Jul-Sep | | Oct-Dec | | Jan-Mar | | Total | |
| | Tally | % | Tally | % | Tally | % | Tally | % | Tally | % |
| 5:01 am - 8:29pm | 914 | 29% | 1,475 | 42% | 1,741 | 38% | 1,443 | 42% | 5,573 | 38% |
| 8:30 pm - 5:00am | 2,274 | 71% | 2,045 | 58% | 2,841 | 62% | 1,960 | 58% | 9,120 | 62% |
| Total | 3,188 | 100% | 3,520 | 100% | 4,582 | 100% | 3,403 | 100% | 14,693 | 100% |

Source: Nielsen Media Research, post calculated tabulations.

Table 4 shows that of the 14,693 alcohol advertisements shown on weekends and public holidays over the period April 2004 to March 2005, the most alcohol advertisements were shown during the final quarter of 2004 (4,582 ads). The remaining three quarters had a similar number of alcohol advertisements shown (Qtr 2 2004: 3,188 ads, Qtr 3 2004: 3,520 ads, Qtr 1 2005: 3,403 ads).

Across all quarters 38 per cent of the alcohol beverage advertisements shown on weekends and public holidays were placed in the day time period of between 5am and 8:30pm, while the remainder (62%) was shown during the evening time slot. Exposure to alcohol advertising during the day time period of 5am to 8:30pm, reflecting its inclusion in live sports programming, was lowest during quarter 2 2004 (29%), while consistently higher during the remaining quarters (Qtr 3 2004: 42%, Qtr 4 2004: 38%, Qtr 1 2005: 42%).

Weekdays

Table 5 shows the number and the proportion of alcohol advertisements shown on weekdays, excluding public holidays, by time of day and by year quarter.

Table 5: Alcohol advertisements broadcast on weekdays, excluding public holidays, by time of day from April 2004 to March 2005

| Weekday alcohol advertising placements excl. public hols | 2004 | | | | | | 2005 | | Total | |
|--|--------------|-------------|--------------|-------------|--------------|-------------|--------------|-------------|---------------|-------------|
| | Apr-Jun | | Jul-Sep | | Oct-Dec | | Jan-Mar | | Total | |
| | Tally | % | Tally | % | Tally | % | Tally | % | Tally | % |
| 5:01 am - 11:59pm | 8 | <1% | 5 | 0% | 59 | 1% | 93 | 2% | 165 | 1% |
| 12 noon - 3 pm | 7 | <1% | 80 | 2% | 407 | 5% | 145 | 3% | 639 | 3% |
| 3:01 pm - 8:29 pm | 35 | 1% | 91 | 2% | 111 | 1% | 126 | 3% | 363 | 2% |
| 8:30 pm - 5:00am | 3,819 | 99% | 4,417 | 96% | 6,909 | 92% | 3,825 | 91% | 18,970 | 94% |
| Total | 3,869 | 100% | 4,593 | 100% | 7,486 | 100% | 4,189 | 100% | 20,137 | 100% |

Source: Nielsen Media Research, post calculated tabulations.

Over the time period of April 2004 to March 2005 a total of 20,137 alcohol advertisements were shown on weekdays, with a seasonal peak in advertisements shown during the final quarter of 2004 (ie 7,486 advertisements). Across the year, 97 per cent of the alcohol beverage advertisements broadcast were placed in the evening time slot of 8:30pm to 5am (94%) or the daytime period of 12 to 3pm (3%). The remaining three per cent of advertisements accompanied sporting programs broadcast outside of these two time periods (5am-12noon: 1%; 3pm-8:30pm: 2%).

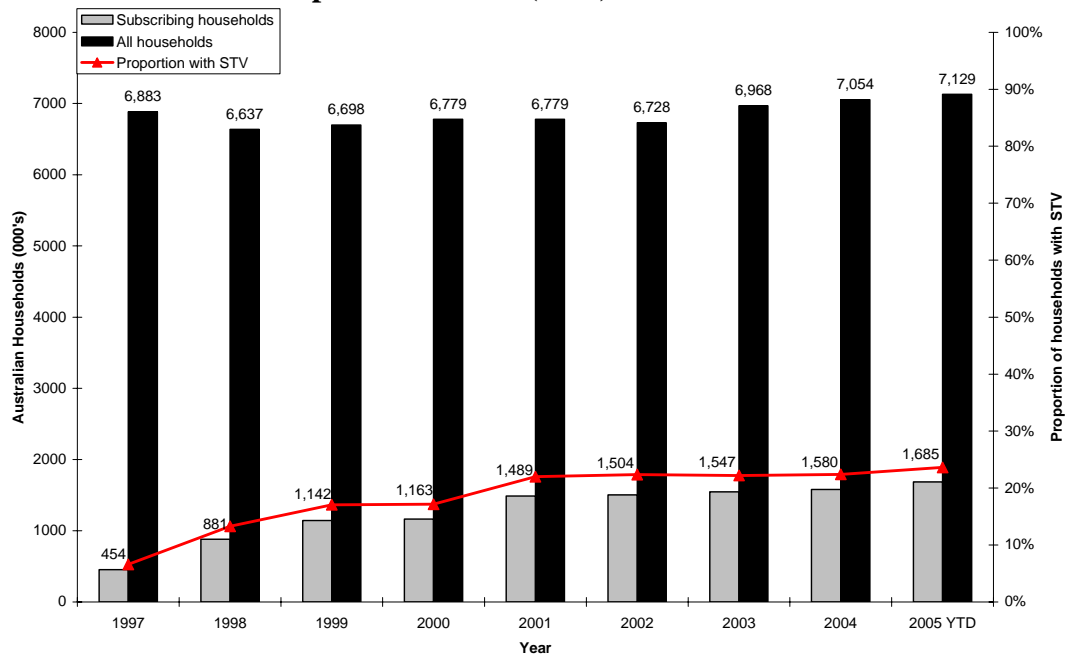
3.3 Subscription television trends

In the ten years that subscription television has been available in Australia, it has made a substantial impact on the media landscape. Subscription television was launched in Australia in January 1995, and was distributed to Adelaide, Brisbane, Melbourne and Sydney. The subscription rate achieved at the end of the first year of operation was 85,000 households, equating to 300,000 viewers⁴. By 2005 the subscription rate had increased to 1,685,000 homes, representing 5,320,100 people⁵. Available data on subscription numbers and viewing patterns from the multi channel network (mcⁿ) covers 1997 to the first half of 2005.

Australian household uptake of subscription television

The trend for uptake of subscription television by Australian households from 1997 to 2005 is shown in Figure 5.

Figure 5: The total number of households in Australia and those with access to subscription television (STV): 1997 to 2005



Source: mcⁿ

From Figure 5 it can be seen that, over the nine year period of 1997 to 2005, the number of households in Australia has ranged from a low of 6.6 million in 1998 to 7.1 million in 2005, and the number of households with subscription television increased from 0.5 million in 1997, representing seven per cent of Australian households, to 1.7 million in 2005, representing 24 per cent of households. The growth in subscription television was relatively modest between 2001 and 2005, after an initially steeper uptake from 1995 to 2001.

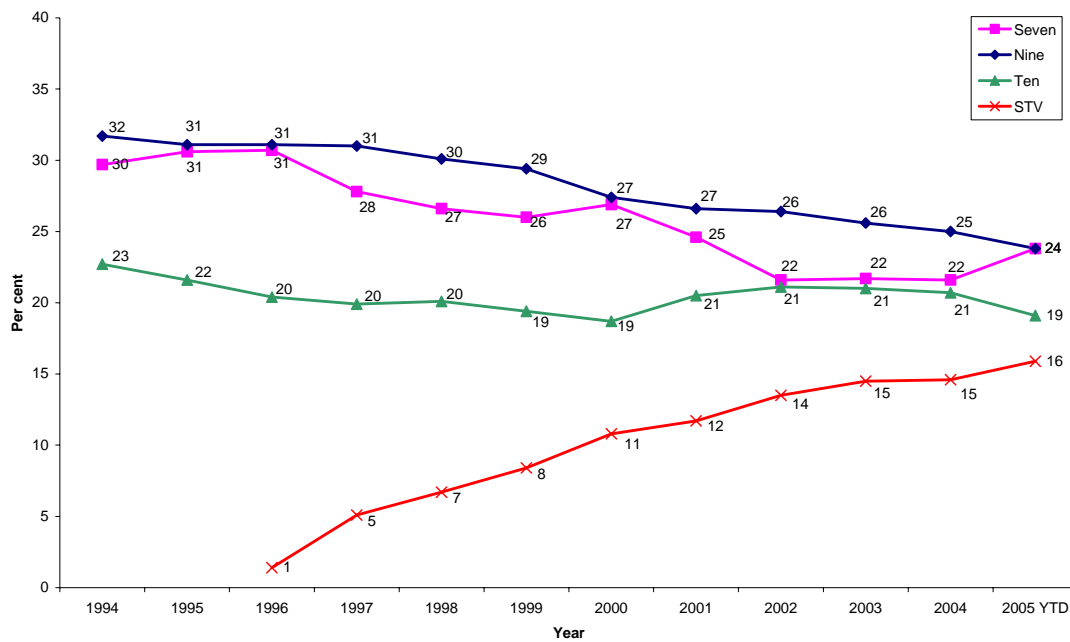
With a typical subscription television home having an average of 3.2 residents⁶, the number of households with subscription television in the first half of 2005 equated to a viewing potential of more than 5 million Australians, representing approximately one quarter of the total population.

Digital television was launched in Australia in March 2004, and by June 2005 73 per cent of households with subscription television were subscribing to digital television⁷.

Subscription television market share

The share of the television viewing averaged across all metropolitan homes, for the three commercial free-to-air television stations and subscription television is shown in Figure 6.

Figure 6: The share of television viewing by commercial stations and subscription television (STV), averaged across all metropolitan homes: 1994 to 2005



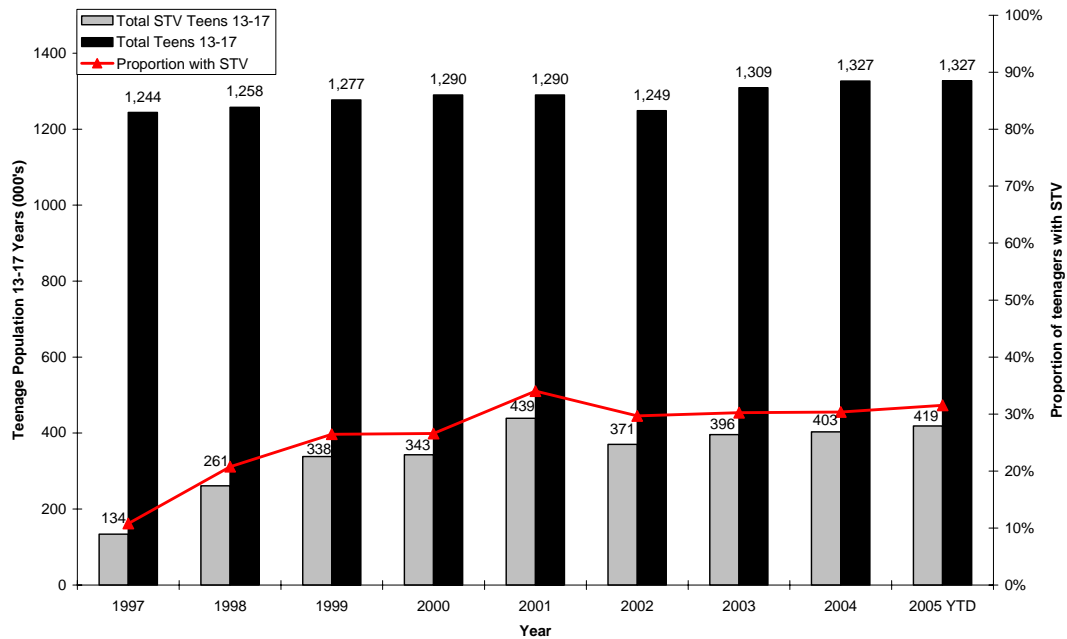
Source: mcⁿ. Provided by ACNielsen 1994-2000 (calendar year Su-Sa 0600-0600), OzTAM 2001-2004 (calendar year Su-Sa 0200-0200) (2004 excl Olympics Wks 33-36), 2005 (06/02/05-03/05/05), Share of ALL TV Excl Spillage & Other. SBS and ABC shares not shown.

It can be seen that the share of audience for subscription television has increased from 1 per cent in 1996 up to 16 per cent in the first half of 2005. During this time the audience share for the three commercial television stations has gradually declined from approximately 30 per cent in 1994 to 24 per cent in 2005 for Channels Seven and Nine, and from 23 per cent in 1994 to 19 per cent in 2005 for Channel 10.

Australian adolescents access to subscription television

The number and proportion of adolescents 13-17 years with access to subscription television is shown in Figure 7.

Figure 7: The total number of adolescents in Australia, and those with access to subscription television (STV): 1997 to 2005



Source: mcⁿ

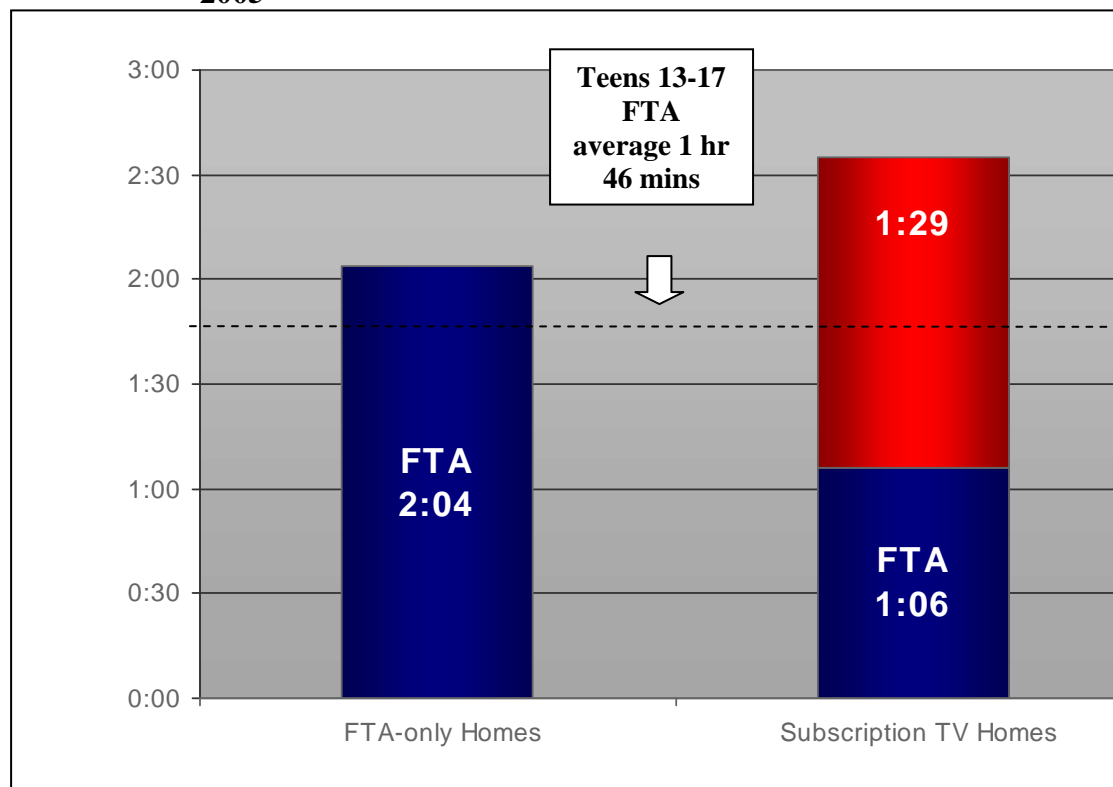
The number of adolescents in Australia aged 13-17 years ranged from 1,244,000 in 1997 to 1,327,000 in 2004 and 2005. The number of adolescents with access to subscription television in 1997 was 134,000, representing 11 per cent of the teenage population, which increased to a peak of 439,000 in 2001, representing 34 per cent of that population. In 2005 419,000 adolescents had access to subscription television, representing 32 per cent of the teenage population.

Information regarding the proportion of households with adolescents aged 13-17 years with access to subscription television is available for the years 1997 to 2001. Trends in these data reflect that seen in Figure 7. In 1997 10 per cent of households with adolescents 13-17 years had access to subscription television, increasing to 33 per cent in 2001.

Amount and type of television viewed by adolescents with and without subscription television

The amount of television watched by adolescents aged 13-17 years in households with and without subscription television is shown in Figure 8. It can be seen that from January to July 2005 all adolescents aged 13-17 years in Australia watched, on average, one hour and 46 minutes of free-to-air television per day. Those without subscription television viewed, on average, just over 2 hours of free-to-air television per day, whilst those with subscription television viewed on average just over one hour.

Figure 8: The average time spent viewing free-to-air (FTA) and subscription television (STV) by adolescents aged 13-17 years: January to July 2005



Adolescents with access to subscription television viewed, on average, a total of 2 hours 35 minutes of television in total a day. Subscription television represented 55 per cent of their viewing time, equating to one hour 29 minutes on average per day.

4.0 DISCUSSION

Concern about young people's exposure to alcohol advertising relates to the impact this exposure might have on young people's interest in drinking alcohol, and the amount and regularity with which they may drink. Research suggests that alcohol advertising has a cumulative influence in shaping young people's perceptions of drinking norms, and that exposure to regular heavy alcohol promotion can generate a more favourable disposition toward drinking and increase the likelihood of heavier drinking in the future⁸.

Estimated expenditure on alcohol beverage advertising in mainstream media in Australia has grown to \$124 million in 2004. Close to half of recent alcohol advertising estimated expenditure has been on beer brands, and a similar proportion of total estimated expenditure has been spent on advertising on metropolitan television. A seasonal peak in estimated alcohol advertising expenditure occurs during the final quarter of the calendar year, reflecting a stronger proportion of alcohol beverage advertising, particularly beer advertising on television, leading into summer.

Significant exposure to alcohol advertising among adolescents has been found. An examination of the weight of exposure to alcohol advertising amongst 13-17 year olds in the Sydney and Melbourne metropolitan television markets has shown that exposure to these adolescents has been almost as heavy as exposure to people aged 18-29 years. For some alcohol brands, alcohol advertising exposure to adolescents was found to be greater than for those aged 18 to 29 years. Over the twelve month period from April 2004 to March 2005, among the thirty alcohol brands with the greatest estimated expenditure (across the beer, spirits and wine categories) in Sydney and Melbourne, two brands in Sydney had equal or greater relative exposure to adolescents, and eight brands in Melbourne had greater exposure. This data suggests that young people under the legal drinking age of 18 years are experiencing significant exposure to alcohol advertising, in both absolute and relative terms.

Young people's potential exposure to alcohol advertising is increased with the provision of alcohol advertising as an accompaniment to "live" sporting events, outside of the 8:30pm to 5:00am time slot. During the twelve month period of April 2004 to March 2005, 19 per cent of all the alcohol advertisements shown were broadcast during the daytime period of 5am to 8:30pm, while the remaining 81 per cent of advertisements were broadcast during the evening period of 8:30pm to 5am. Thirty-eight per cent of all alcohol advertisements shown during weekends and public holidays were broadcast during the daytime period of 5am and 8:30pm. While these data relate more to the Commercial Television Industry Code of Practice than the Alcohol Beverages Advertising Code, it indicates that a sizeable proportion of alcohol advertisements are shown during day time hours on weekends, accompanying a variety of sporting programs with potential interest to people of all ages.

An additional opportunity for alcohol advertising exposure to adolescents is on subscription television. Alcohol advertising on subscription television is worthy of further monitoring and investigation, for three reasons. The first is that there is currently no data available regarding the amount of alcohol advertising on subscription television, the type of alcohol advertising broadcast or the placement of

alcohol advertising, by channel or program. Secondly, the proportion of adolescents with access to subscription television is growing rapidly, with 32 per cent of adolescents 13-17 years currently with access. Furthermore, those adolescents with access to subscription television on average spend more time watching subscription television than free-to-air television. Thirdly, there are currently no restrictions on when alcohol advertising can be placed on subscription television, merely guidelines.

Another possible issue for consideration relates to the adoption of digital technology within the subscription television market, and the impact this will have on marketing communications. For example, Foxtel IQ, which is now available, enables viewers to record, rewind and fast forward television, including advertisements, which may lead to the development of other more integrated advertising and marketing approaches. As alcohol marketing becomes more sophisticated and pervasive, monitoring of communication channels becomes more critical.

REFERENCES

- ¹ Carroll T and Cramer P (1996). *Advertising of Alcoholic Beverages in Australia: Expenditure and Exposure 1991-1995*. Research and Marketing Group, Public Affairs and International Branch, Commonwealth Department of Human Services and Health.
- ² *Commercial Television Industry Code of Practice* (July 2004). Published by Free TV Australia, Mosman, Sydney.
- ³ Australian Subscription Television and Radio Association (ASTRA) Subscription Broadcast Television Code of Practice (July 2003).
<http://www.astra.org.au/article.asp?section=4&option=3>
- ⁴ ASTRA website, September 2005, under subscription TV,
<http://www.astra.org.au/article.asp?section=2&option=1&content=1>
- ⁵ Multi channel network (mcⁿ) personal communication.
- ⁶ OzTAM, Quarter 1 2005.
- ⁷ Multi channel network (mcⁿ) personal communication.
- ⁸ Babor, T., Caetano, R., Casswell, S., Edwards, G., Giesbrecht, N., Graham, K., Grube, J., Gruenewald, P., Hill, L., Holder, H., Homel, R., Osterberg, E., Rehm, J., Room, R. and Rossow, I. (2003). *Alcohol: No ordinary commodity. Research and Public Policy*. Oxford University Press, 2003.

APPENDIX 1: MEDIA OUTLETS MONITORED THROUGH THE NIELSEN MEDIA RESEARCH ADEX SERVICE

| Metropolitan Television | | | |
|--------------------------------|------------------|-------------------|------------|
| Network 7 | Network 9 | Network 10 | SBS |
| ATN7 | TCN9 | TEN10 | SBSSYD |
| HSV7 | GTV9 | ATV10 | SBSMEL |
| BTQ7 | QTQ9 | TVQ10 | SBSBRI |
| SAS7 | NWS9 | ADS10 | SBSADL |
| TVW7 | STW9 | NEW10 | SBSPER |

| Regional Television | | |
|----------------------------|----------------|------------------------------------|
| Prime | WIN | TEN Capital |
| ACT | ACT | ACT |
| Central West | Central West | Central West |
| Illawarra | Illawarra | Illawarra |
| Wagga | Wagga | Wagga |
| Coffs Harbour | Cairns | TEN Queensland |
| Lismore | Mackay | Cairns |
| Newcastle | Maryborough | Mackay |
| Tamworth | Rockhampton | Maryborough |
| Taree | Sunshine Coast | Rockhampton |
| Albury | Toowoomba | Sunshine Coast |
| Ballarat | Townsville | Toowoomba |
| Bendigo | Hobart | Townsville |
| Gippsland | Launceston | TEN Northern NSW |
| Shepparton | Albury | Coffs Harbour |
| GWN Bunbury | Ballarat | Lismore |
| GWN Northern | Bendigo | Newcastle |
| GWN Southern | Shepparton | Tamworth |
| 7 Queensland | Traralgon | Taree |
| Cairns | WA | Southern Cross Broadcasting |
| Mackay | NBN | Hobart |
| Maryborough | Coffs Harbour | Launceston |
| Rockhampton | Lismore | TEN Victoria |
| Sunshine Coast | Newcastle | Albury |
| Toowoomba | Tamworth | Ballarat |
| Townsville | Taree | Bendigo |
| NTD | | Gippsland |
| Darwin | | Shepparton |
| TND | | |
| Darwin | | |

| Radio | | |
|------------------------|-----------------------------|---|
| Macquarie Radio | ARN Radio | DMG Radio |
| 2CH | MIX106 | FIVEAA |
| 2GB | WSFM | NOVA96 |
| Austereo Radio | MIX101.1 | NOVA100.3 |
| 2DAYFM | 4KQ | NOVA93.7 |
| 2MMM | MIX102.3 | Grant Broadcasters/Capital Radio |
| FOXFM | GOLD104 | 6IX |
| 3MMM | 5DN | ARN/DMG Radio |
| B105FM | Southern Cross Radio | 97.3 |
| 4MMM | 2UE | Victorian Radio Network |
| SAFM | 3AW | 3MP |
| 5MMM | 4BH | 3AK |
| 92.9FM | 4BC | |
| 945FM | 96FM | |
| | 6PR | |
| | MAGIC693 | |

| Outdoor Companies | Cinema |
|-------------------------------|-----------------|
| Adshel | Val Morgan & Co |
| Australian Posters | |
| Bailey Outdoor Advertising | |
| Buckle Outdoor Advertising | |
| Buspak | |
| Cody Outdoor | |
| Eye Corp | |
| General Outdoor | |
| Independent Outdoor Melbourne | |
| Outdoor Network Australia | |
| Outdoor Plus | |
| Russell Outdoor | |
| Taximedia | |

| Magazines Updated | |
|--------------------------------------|------------------------------------|
| 4x4 Australia | Dolly |
| ADB Roost | Donna Hay |
| AGE Drive Prestige | Empire |
| AGE Good Living Fashion | Family Circle |
| AGE Good Living Fashion Men's | FHM |
| AGE Good Weekend | Filmink |
| AGE Travel | Fishing World |
| AGE Winter + Food | Freerider MX |
| AGE-Epicure Uncorked | Freshwater Fishing |
| Aus Auto Action | Gardening Australia |
| Aust Geographic | Gardens & Outdoor Living |
| Aust Motorcycle News | GEO |
| Australasian Dirt Bike | Girlfriend |
| Australian Country Style | Golf Australia |
| Australian Financial Review Boss | Good Medicine |
| Australian Financial Review Magazine | Gourmet Traveller |
| Australian Golf Digest | Handmade |
| Australian Good Taste | Harper's Bazaar |
| Australian Mother & Baby | Herald Sun - Christmas In The City |
| Australian PC Authority | Herald Sun Home |
| Australian PC User | Home Beautiful |
| Australian Penthouse | Homes & Living |
| Australian Personal Computer | House & Garden |
| Australian Style | HQ |
| Australian Table | Inside Edge |
| Australian Way | Inside Football |
| Australian Womens Weekly | Inside Out |
| Australia's Parents | Inside Sport |
| Australia's Surfing Life | Instyle |
| B | Interiors |
| Barbie | International Wellbeing |
| Belle | Internet.AU |
| Better Homes & Gardens | Juice |
| Black & White | League Week |
| Bride To Be | Mania |
| BRW | Marie Claire |
| Bulletin | Marque |
| Burke's Backyard | Men's Health |
| Chik | Modern Fishing |
| Cleo | Money Magazine |
| Cosmopolitan | Motor |
| Courier Mail - Connect Magazine | National Geographic |
| Daily Telegraph - Connect Magazine | Nature & Health |
| Daily Telegraph Homes | New Idea |
| Daily Telegraph Wine | New Scientist |
| Daily Telegraph-SLM | New Woman |
| Delicious | NW |
| Dirt Action | Open Road |
| Disney Adventures | Overlander 4WD Magazine |
| Disney Girl | Oyster |
| Dmag | PC Powerplay |
| Dog's Life | PC World |

| | |
|-----------------------------------|----------------------------------|
| People | Sunday Mail TV Guide - Brisbane |
| Performance Street Bike | Sunday Telegraph-Sunday Magazine |
| Personal Investor | Sunday Telegraph-TV Guide |
| Perth Sunday Times TV Guide | Sunday Times Magazine |
| Practical Parenting | Super Food Ideas |
| Pregnancy & Birth | SurfGirl |
| Ralph | Surfing World |
| Readers Digest | Take 5 |
| Rollercoaster | That's Life |
| Rolling Stone | The Picture |
| Shares | Time |
| Slimming | Total Girl |
| Smash Hits | Tracks |
| SMH - The (Sydney) Magazine | TV Hits |
| SMH Drive Prestige | TV Soap |
| SMH Good Living Fashion | TV Week |
| SMH Good Living Fashion Men's | Two Wheels |
| SMH Good Weekend | Vogue Australia |
| SMH Travel | Vogue Entertaining & Travel |
| SMH Winter + Food | Vogue Living |
| SMH-Good Living Uncorked | Waves |
| Street Machine | Weekend Australian Magazine |
| Studio For Brides | Weight Watchers Magazine |
| Sun Herald Shop | West Australian Habitat Magazine |
| Sun Herald-Sunday Life | West Magazine |
| Sun Herald-Television Magazine | What DVD |
| Sunday Age-Sunday Life | Wheels |
| Sunday Age-Television Magazine | Who Weekly |
| Sunday Herald Sun-Sunday Magazine | Womans Day |
| Sunday Herald Sun-TV Guide | Your Garden |
| Sunday Mail TV Guide - Adelaide | Your Mortgage Magazine |
| Kitchens & Bathrooms | |
| K-Zone | |

| Metropolitan Newspapers | Rural Press |
|--------------------------------|--------------------|
| Advertiser | Stock & Land |
| Age | The Land |
| Australian | Weekly Times |
| Australian Financial Review | |
| Courier Mail | |
| Daily Telegraph | |
| Herald Sun | |
| Mercury | |
| Sun Herald | |
| Sunday Age | |
| Sunday Herald Sun | |
| Sunday Mail - Brisbane | |
| Sunday Mail Adelaide | |
| Sunday Tasmanian | |
| Sunday Telegraph | |
| Sunday Times | |
| Sydney Morning Herald | |
| West Australian | |

| Regional Newspapers | |
|-------------------------------|--------------------------------|
| Albury Border Morning Mail | Ipswich QLD Times |
| Ballarat Courier | Launceston Examiner |
| Bathurst Western Advocate | Lismore Northern Star |
| Bendigo Advertiser | Mackay Mercury |
| Broken Hill Barrier Dly Truth | Maitland Mercury |
| Bundaberg News Mail | Mildura Sunraysia Daily |
| Burnie Advocate | MT.ISA North West Star |
| Cairns Post | Newcastle Herald |
| Canberra Sunday Times | Northern Territory News |
| Canberra Times | Orange Central Western Daily |
| Coffs Harbour Advocate | Rockhampton Bulleting |
| Dubbo Daily Liberal | Shepparton News |
| Fraser Coast Chronicle | Sunday Examiner |
| Geelong Advertiser | Sunday Territorian |
| Geelong Sunday Advertiser | Sunshine Coast Daily |
| Gladstone Observer | Tamworth Northern Daily Leader |
| Gold Coast Bulletin | Toowoomba Chronicle |
| Goulburn Evening Post | Townsville Bulletin |
| Grafton Daily Examiner | Tweed Daily News |
| Gympie Times | Wagga Advertiser |
| Illawarra Mercury | Warrnambool Standard |
| | Warwick Daily News |

APPENDIX 2: CLAUSES FROM THE COMMERCIAL TELEVISION INDUSTRY CODE OF PRACTICE THAT RELATE TO ALCOHOL ADVERTISEMENTS

SECTION 2: CLASSIFICATION

Classification Zones

Mature (M) classification zones

2.10 The M classification zones are:

| | | | |
|---|----------------------|---|--------------------------------------|
| <i>Weekdays</i> (Schooldays) | 8:30pm 12.00 noon | - | 5:00am 3:00pm (see clause 2.10.3) |
| <i>Weekdays & weekends</i> (School holidays) | 8:30pm | - | 5:00am |

2.10.1 In M zones, any material which qualifies for a television classification may be broadcast, except that material classified MA and AV is restricted to the times set out in Clauses 2.11 and 2.12 respectively.

2.10.2 School holidays mean Government primary school holidays in the State or Territory in which the service originates.

2.10.3 When the time of reception anywhere in a licence area is more than one hour in advance of the time of origin of the service, the M classification zone on schooldays extends between noon and 2:30pm, rather than 3:00pm.

Mature audience (MA) classification zones

2.11 The MA classification zone is all days between 9:00pm and 5:00am. In MA zones, any material which qualifies for a television classification may be broadcast, except that material classified AV may only be broadcast after 9:30pm.

Adult violence (AV) classification zones

2.12 The AV classification zone is all days between 9:30pm and 5:00am. In AV zones, any material that satisfies a television classification may be broadcast.

SECTION 6: CLASSIFICATION AND PLACEMENT OF COMMERCIALS AND COMMUNITY SERVICE ANNOUNCEMENTS

Commercials which Advertise Alcoholic Drinks

6.7 A commercial which is a “direct advertisement for alcoholic drinks” (as defined in Clause 6.11) may be broadcast:

6.7.1 only in M, MA or AV classification periods; or

6.7.2 as an accompaniment to the live broadcast of a sporting event on weekends and public holidays.

- 6.8 Notwithstanding Clause 6.7, a commercial which is a “direct advertisement for alcoholic drinks” may be broadcast as an accompaniment to the live broadcast of a sporting event if:
- 6.8.1 The sporting event is broadcast simultaneously across a number of licence areas; and
 - 6.8.2 Clause 6.7 permits direct advertisements for alcoholic drinks in the licence area in which the event is held or, if the event is held outside Australia, direct advertisements for alcoholic drinks are permitted in a majority of the metropolitan licence areas in which the event is simulcast.
- 6.9 A commercial which is a direct advertisement for an ‘alcoholic drink’ or a ‘very low alcohol drink’ (as both are defined in Clause 6.10) may not be broadcast during a C classification period, as defined in the Children’s Television Standards.
- 6.10 An **“alcoholic drink”** means any beer, wine, spirits, cider, or other spirituous or fermented drinks of an intoxicating nature, and is generally understood to refer to drinks of 1.15% or more alcohol by volume. The view of the Commonwealth Department of Health is that drinks of less than 1.15% alcohol by volume should be classified as **“very low alcohol”** drinks.
- 6.11 **“Direct advertisement for alcoholic drinks”** means a commercial broadcast by a licensee that draws the attention of the public, or a segment of it, to an alcoholic drink in a manner calculated to directly promote its purchase or use. This does not include the following, provided that their contents do not draw attention to an alcoholic drink in a manner calculated to directly promote its purchase or use:
- 6.11.1 a program sponsorship announcement on behalf of a brewing company or other liquor industry company;
 - 6.11.2 a commercial for a licensed restaurant; or
 - 6.11.3 a commercial for a company whose activities include the manufacture, distribution or sale of alcoholic drinks.
- 6.12 **“Live sporting event”** means:
- 6.12.1 live-to-air sporting broadcasts, including breaks immediately before and after the broadcast;
 - 6.12.2 sporting broadcast delayed for time zone reasons and broadcast as plausible “live”, without reformatting;
 - 6.12.3 sporting broadcasts delayed in the licence area in which the event is being held pursuant to a requirement of the relevant sporting organisation (known in the industry as “delay against the gate”);
 - 6.12.4 replay material where a scheduled live-to-air sporting broadcast has been temporarily suspended (e.g. during ran breaks in cricket coverage), provided that normal or stand-by programs have not been resumed.
- 6.13 **“Public holidays”** are those days proclaimed, Gazetted, or nominated in a statute as public holidays under the relevant State or Territory legislation. These holidays generally affect either an entire State or Territory (such as the various Queen’s Birthday holidays) or a particular city or region (such as Melbourne Cup Day in Melbourne).
- 6.13.1 Where a licence area covers areas in which different public holidays are observed, the station should schedule according to the public holidays in the area which contains the majority of the licence area population.