

A historical analysis of alcohol advertising in print media 1989–2009

Final report

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Report to the Victorian Health Promotion Foundation

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December 2011



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1 Executive summary

This report examines alcohol product advertising in two daily newspapers in Victoria over a 20 year period from 1989 to 2009. It is the product of a study whose primary aim was to identify the nature and extent of packaged liquor advertising and to ascertain if and how this advertising had changed in character over that period.

This study originated in the work of the Alcohol Policy Coalition (APC), a collaboration of health agencies with a shared concern about the level of alcohol misuse and its health and social consequences. The coalition comprises the Australian Drug Foundation, Cancer Council Victoria, the Heart Foundation, the Victorian Health Promotion Foundation (VicHealth), and Turning Point Alcohol and Drug Centre.

Part of the Coalition's work has focused on alcohol marketing in its various forms because marketing has been shown to influence consumption by young people and contribute to levels of unsafe drinking. The APC supports measures to regulate alcohol advertising effectively as a component of a comprehensive strategy to deal with and minimise alcohol-related harm in Australia, particularly among young people.

In 2010, APC members expressed concerns about the apparent growth of large scale alcohol product advertisements in newspapers. Members observed the extent of full page spreads, which often included heavily discounted products advertised by the larger packaged liquor retailers. Questions arose about the changing nature of alcohol advertising in this medium. The APC concluded that a small research project should be undertaken to investigate the nature of alcohol advertising in print media and if it has changed over time. VicHealth agreed to provide funding for the ADF to undertake the study. This report is the outcome of that study.

Alcohol product advertisements from two daily newspapers – *The Age* and the *Herald Sun* – were audited within specified periods at five-year intervals between 1989 and 2009. Data was collected on the number of advertisements, the number and type of products, the size of advertisements, the placement of advertisements, and the seasonal distribution of advertising.

This study shows how alcohol products are advertised in major daily newspapers and how this form of advertising has changed over time.

Key findings

Over the past two decades, alcohol product advertising in two major newspapers in Victoria has changed in several ways:

1. Advertising is now dominated by large-scale alcohol retailers or 'liquor barns'; advertising by small 'boutique' specialist retailers has declined radically.
2. There is a noticeable trend towards large, full-page advertisements that feature colour photographs of products and large fonts.
3. More prominence is given to the price of products, especially through the promotion of 'special offers' and discounts for 'bulk' purchases.
4. Alcohol advertising often occupies whole pages at the front of the newspaper, making it difficult for the reader to avoid.

5. Advertising of pre-mixed spirits, known as ready-to-drink beverages (RTDs) or 'alcopops', increased markedly over the period in line with the growth of pre-mixed spirits in the alcohol marketplace.
6. Advertising of pre-mixed spirits was most prominent in the newspaper with the largest youth audience.

Implications

1. Exposure to alcohol advertising of readers has most likely increased as a consequence of the changed character of alcohol advertising in daily newspapers.
2. Young people's exposure to alcohol advertising has most likely increased as a consequence of the changed character of alcohol advertising in daily newspapers.
3. The location and prominence of alcohol advertising in daily newspapers appears to contradict the regulatory principle that alcohol advertising should be quarantined from youthful audiences.
4. Alcohol product advertising in daily newspapers is consistent with the notion that alcohol is now treated as an 'ordinary commodity' rather than a specialist product requiring careful treatment.

Recommendations

1. That the results of this study are brought to the attention of public health policymakers, regulators of alcohol advertising, and researchers into alcohol marketing and advertising.
2. That public health bodies and other interested parties should advocate for a review of the regulatory code that applies to alcohol advertising in newspapers on the grounds that it is ineffective in protecting minors from alcohol advertising.
3. That further research be conducted into the subject of print alcohol advertising to establish:
 - a) whether the trends identified in this exploratory study are substantial and continuing;
 - b) the impact of print alcohol advertising on young people's attitudes toward alcohol, intention to drink and their actual patterns of consumption;
 - c) the impact of alcohol product advertising in newspapers on consumption trends and the consequences of that consumption; and
 - d) how alcohol advertising in the print media compares with alcohol advertising in other forms of media.
4. That future research into this subject should be conducted in partnership with or be informed by practitioners and researchers with expertise in marketing.

2 Introduction

2.1 Background

The Australian Drug Foundation (ADF) and the Alcohol Policy Coalition (APC) are concerned about the impact of alcohol advertising and marketing on alcohol consumption, and particularly the influence on young people's drinking (Australian Drug Foundation, 2010; Alcohol Policy Coalition, 2009).

In early 2010, APC members discussed the apparent growth of large scale advertising for alcohol products in newspapers. Members observed the extent of full page spreads, which often included heavily discounted products advertised by the larger packaged liquor retailers. Questions arose about the changing nature of alcohol advertising in this medium. The APC concluded that a small research project should be undertaken to investigate the nature of alcohol advertising in print media and whether it has changed over time. VicHealth agreed to provide funding for the ADF to undertake the study.

2.2 Context

There is a growing body of evidence that exposure to alcohol advertising significantly influences young people's decisions about drinking and their expectations related to later alcohol use (Babor et al., 2010).

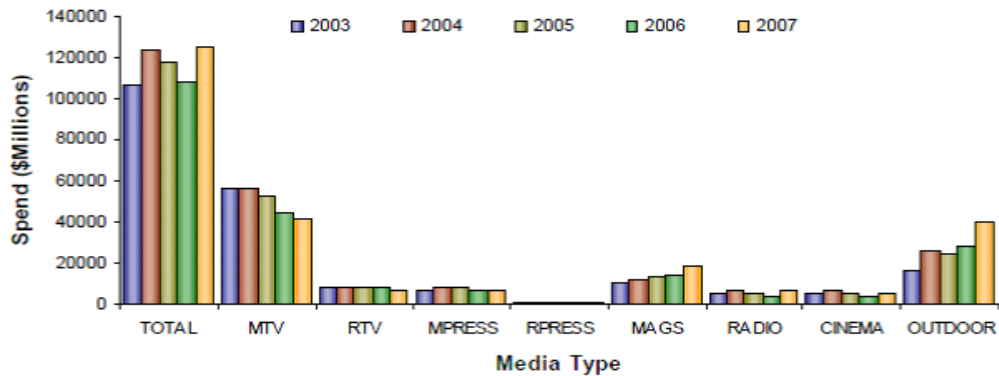
Alcohol producers and manufacturers strive to make their products attractive to consumers and to distinguish them from their rivals using a variety of marketing strategies. Marketing is crucial for alcohol producers to achieve their principal aim of gaining the greatest possible share of the market and maximising consumption in order to provide the greatest return to shareholders (Munro & de Wever, 2008).

Alcoholic beverages are marketed through a broad range of media. Traditional methods include a mix of television, radio and print advertising as well as promotion at point of sale. More recently, alcohol marketers have utilised a range of innovative technologies including social networking sites and campaigns that combine multiple technologies such as personalised emails or text messages (Casswell & Maxwell, 2005). The dynamic and interactive nature of these forms of marketing makes them a particularly powerful and popular promotional way of engaging younger audiences (Carrol et al., 2005).

Much of the research into exposure to alcohol marketing has focused on the impact of the forms of advertising which link alcohol products to image or lifestyle aspects. Fewer studies have explored advertising in print media, particularly regarding content, which includes the retail elements of the product such as brand, quantity, price and advertiser. The research that exists has tended to focus on alcohol advertising in magazines and the potential for exposure to youth audiences. One US study found a correlation between the number of advertisements for beer and distilled spirits and the adolescent readership (Garfield et al., 2003 cited in Roche et al., 2007).

Even less is known about the extent and impact of alcohol advertising in newspapers. Print media advertising represents a very small proportion of the advertising spend for the alcohol industry, as illustrated by the following figure from Nielsen Media Research (Victorian Department of Human Services, 2009). 'MPRESS' denotes the level of expenditure on alcohol advertising in national and metropolitan newspapers and it is clearly secondary to expenditure on metropolitan television, magazines and outdoor advertising.

Expenditure on Alcohol Advertising by Media Outlet
January 2003 - December 2007



Source: Nielsen Media Research

Figure 1: Expenditure on alcohol advertising by media outlet

2.2.1 Importance of the packaged liquor market

Packaged liquor represents a significant portion of the overall liquor market as it is worth an estimated \$11.5 billion a year, with the Coles Myer – Woolworths duopoly receiving nearly 50% of the total expenditure (Jones, 2005). The role played by the duopoly in driving competitive marketing practices in the packaged liquor industry has been the subject of much discussion (Jones, 2005). Extreme price discounting, including ‘loss-leader’ practice whereby a product is priced below wholesale cost, is designed not only to encourage the purchase of the particular product, but to lure consumers into the store where they may make opportunistic purchases of other products or goods. This may be damaging to public health because there is substantial evidence that a reduction in the price of alcohol increases consumption and the risk of alcohol-related harms (Babor et al., 2010).

More than 75% of alcohol in Australia is supplied for off-premises consumption (Euromonitors cited in Victorian Department of Justice, 2008). The 2010 National Drug Strategy Household Survey found that four in five (79.1%) recent drinkers aged 14 years or older usually consumed alcohol in their own homes. Recent research from Western Australia revealed that alcohol sold by ‘off-site’ outlets is associated with increased interpersonal violence occurring at residential homes and on-site outlets (Liang & Chikritzhs, 2010). Given the impact of private consumption on alcohol-related harm, the nature of advertising that promotes packaged liquor products deserves attention.

2.3 Research question

The study undertook a historical analysis of alcohol product advertising in newspaper print media over the last two decades. The primary aim was to identify the nature and extent of packaged liquor advertising and to ascertain if and how this advertising had changed in character over that period.

3 Methodology

The study method involved an audit of alcohol product advertisements in two daily newspapers in Victoria for specified periods between 1989 and 2009.

3.1 Selection of newspapers

Two metropolitan daily newspapers were chosen for the audit – *The Age* and the *Herald Sun*. They were chosen for several reasons.

Daily newspapers allow for regular and methodical assessment and comparison of print advertising over time. Back copies of both newspapers are accessible on microfilm at the State Library of Victoria.

Both daily newspapers reach a large public audience. *The Age* is a broadsheet newspaper published by Fairfax Media. It has an average week day circulation of 197,500, which increases to 279,900 on Saturdays, while the *Sunday Age* averages 224,600. On week days the readership for *The Age* averages 650,000, while the *Sunday Age* reaches 672,000 readers. The top two categories of *Age* readers include a professional/management demographic (Morgan, 2010b)

The *Herald Sun* is a morning tabloid newspaper published by The Herald and Weekly Times Ltd, a subsidiary of News Limited. It is the highest-circulating daily newspaper in Australia, with a week day circulation of 515,000 and readership of 1,500,000. The top two categories of readership are skilled, semi-skilled and unskilled workers and retirees (Morgan, 2010a).

Note: As the *Herald Sun* is the product of a merger in 1990 of two daily newspapers – a morning tabloid, the *Sun News-Pictorial*, and an afternoon broadsheet, *The Herald* – both predecessors were audited to extract the data for 1989.

3.2 Data collection points

A data collection window was established to provide systematic coverage at five-year intervals across the period. As alcohol advertising may vary at seasonal times the audit included a consistent sample of each season for each year. Data was collected over two consecutive weeks in each season so it was conducted for a total of eight weeks per year.

A number of options were considered when selecting an appropriate time for the collection of data. Weeks five and six of each season were chosen as they encompassed several major social and cultural events including New Year celebrations, Easter, the Spring Racing Carnival and the AFL football finals. These periods offered data collection during special events and during periods of 'normal trading'. A time series data collection format was created. The following table shows the specific dates during which data was collected from each newspaper.

Year	Summer	Autumn	Winter	Spring
1989	26/12/1988– 8/1/1989	27/3/1989– 9/4/1989	26/6/1989– 9/7/1989	25/9/1989– 8/10/1989
1994	27/12/1993– 9/1/1994	28/3/1994– 10/4/1994	27/6/1994– 10/7/1994	26/9/1994– 9/10/1994
1999	28/12/1998– 10/1/1999	29/3/1999– 11/4/1999	28/6/1999– 11/7/1999	27/9/1999– 10/10/1999
2004	29/12/2003– 11/1/2004	29/3/2004– 11/4/2004	28/6/2004– 11/7/2004	27/9/2004– 10/10/2004
2009	29/12/2008– 11/1/2009	23/3/2009– 5/4/2009	29/6/2009– 12/7/2009	28/9/2009– 11/10/2009

Table 1: Dates for data collection

3.3 Method of data collection and analysis

At the conceptualisation stage, project staff made contact with the State Library of Victoria to establish the availability and accessibility of back copies over the study period. The library confirmed that copies of the newspapers were available on microfilm and could be accessed without charge. A preliminary examination of period advertising was conducted to determine the attributes of advertisements that would be of value to record.

3.3.1 Data collection

Data was collected over a two week period from 11 to 23 October 2010. This process involved identifying the relevant spool, scanning each newspaper using the Gideon 1000 Library Researcher microfilm equipment and recording specific attributes about each individual advertisement onto an Excel spread sheet via laptop. The structure of the audit tool is found in the Appendix. Selected advertisements from each year were downloaded in PDF form to reflect the style of advertising for each year and to illustrate changes over time.

3.3.2 Definition of advertisement

For the purpose of the study an alcohol advertisement was determined to be 'a paid commercial notice that referred the reader to one or more alcohol products regardless of its dimension'. Some notices referred to or displayed a single product, others encompassed multiple products. In some cases, alcohol products were displayed within other advertisements, as in supermarket grocery advertising. They were counted as a single advertisement.

3.3.3 Data analysis

While the findings refer to yearly or annual changes, the analysed data covers an eight week period across each year. The analysis included:

- the number of advertisements in the edition
- the number of products advertised
- the type of alcoholic beverage advertised
- the size of the advertisement
- the section of the newspaper in which the advertisement was placed (e.g. news, features, sport, lifestyle)
- the seasonal variation of advertising over the period.

3.4 Limitations

There are a number of limitations to this study. First, it was not possible to do an individual audit of each newspaper edition across a 20 year period. The chosen audit periods included a small window of analysis, accounting for only eight weeks in total per year. The results therefore do not give a necessarily representative picture of alcohol product advertising over any single year or over the 20 year period. Second, the study audited only two Victorian daily newspapers and thus does not account for any potential differences in alcohol advertising in daily newspapers published in regional or rural regions. Third, due to the small scale of the study it must be considered exploratory rather than explanatory. It is not possible to attempt to explain the fluctuations or changes in a number of the recorded attributes of advertisements, nor can the results be generalised to apply to a wider representation of print media or other advertising.

4 Findings

4.1 Number of advertisements

Over the 20 year period, a combined total of 635 editions of the two newspapers were audited. This generated a total 810 alcohol advertisements for analysis, of which 363 were in *The Age* and 367 were in the *Herald Sun*.

The figure below shows the breakdown by year in the total number of alcohol advertisements derived from the audit of both newspapers for each data collection year over the 20 year period.

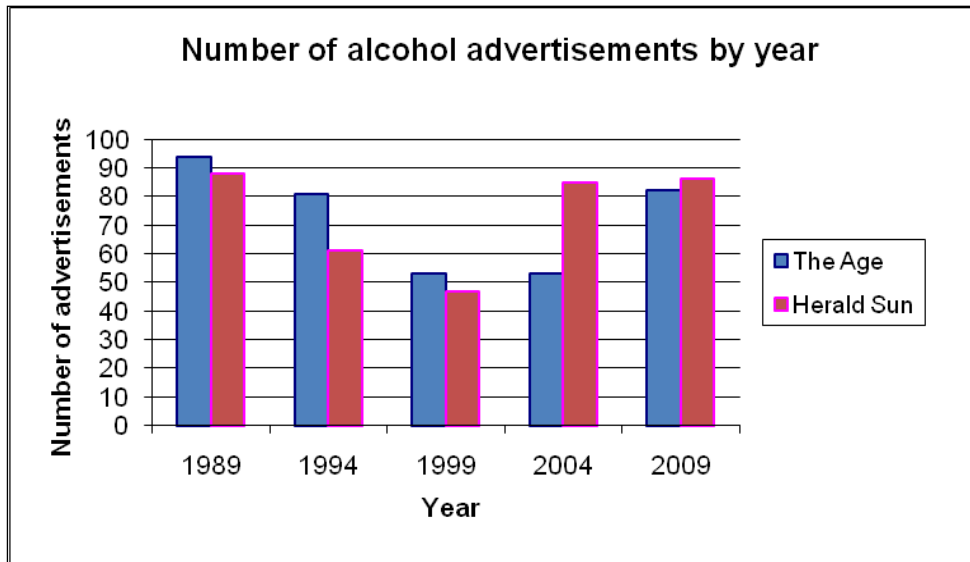


Figure 2: Number of alcohol advertisements by year

The total number of advertisements featured in the analysed editions fluctuated between 1989 and 2009. The combined total of advertisements was highest for both newspapers in 1989 and there was little difference in total numbers between the two: for *The Age* $n=94$ while for the *Herald Sun* $n=88$. It is important to note that the 1989 total for the *Herald Sun* comprised a combination of the totals for the *Sun News-Pictorial* and *The Herald*, as explained at section 3.1. Combining the two was undertaken to avoid skewing the data. There were far fewer alcohol advertisements in *The Herald* ($n=14$). However, the 1989 editions of the *Sun News-Pictorial* included large numbers of alcohol advertisements in the weekend publications.

By 1994 there was a decline in the number of advertisements in the editions scanned: a decrease of 14% in *The Age* and a more substantial decline of 31% in the *Herald Sun*. The audit revealed a continuing downward trend five years later in 1999 as the numbers of advertisements for both newspapers reached the lowest point for the whole collection period. In that year alcohol advertising in *The Age* decreased by 35% to 53 advertisements in total; while the number in the *Herald Sun* descended to 47 advertisements. For both newspapers that decline represented a near 50% reduction in alcohol advertising compared to 10 years earlier.

In 2004, the number of alcohol advertisements in the *Herald Sun* surged by 38%, returning to the recorded totals 15 years prior in 1989 ($n=81$). By contrast, little had changed for *The Age* with the numbers of advertisements remaining static at 53. A similar upward trend occurred five years later in 2009 when the total number of alcohol advertisements in *The Age* jumped by 55% to 82 advertisements for the year. Alcohol advertising in the *Herald Sun* remained static in that period.

4.2 Number and type of alcohol products advertised

Data was also collected on the numbers of products contained within each advertisement. The numbers of products featured in each advertisement varied considerably. In some cases an advertisement contained up to 100 products, while others promoted a single product. The figure below shows the distribution in product numbers by year across the two newspapers.

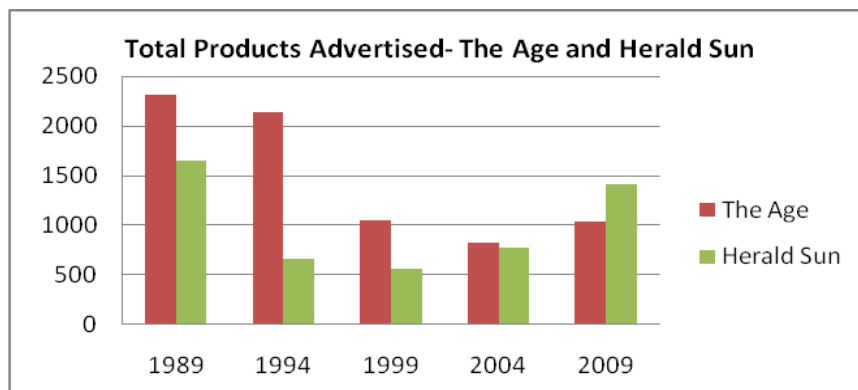


Figure 3: Total number of products advertised by year

In aggregate, there were a total number of 10,917 products advertised across the two publications. Over the 20 year time period, *The Age* featured approximately twice the number of products ($n=7,366$) as the *Herald Sun* ($n=3,551$).

As the chart shows, for the first 10 years (1989 and 1994 data points), there were significantly more products advertised in *The Age* than in the *Herald Sun*. This could be accounted for by the style of advertisement. In those years *The Age* featured notices (counted as a single advertisement) that listed individual wine vintages described by variety of grape, year of production, and price). No pictorial or graphic presentation accompanied the advertisement. This form of advertisement, which listed up to 100 individual products, was much less common in those years in the *Herald Sun*.

From 1989 the general trend was for the number of products advertised to decline. Within a decade, by 1999, the number of products advertised in *The Age* and the *Herald Sun* halved. In 2004 the numbers for both newspapers were relatively similar, representing a continued decline for *The Age* and a slight increase for the *Herald Sun*. Both newspapers showed increased product numbers by 2009, with the *Herald Sun* overtaking *The Age* for the first time.

Data was also recorded for the types of alcoholic beverage advertised and were categorised as beer, wine, spirits, RTDs (ready-to-drink pre-mixed spirits) or 'other'. The 'other' category included champagnes and liqueurs and other products that did not fit the listed categories. The following graphs indicate the changes in the types of products being advertised in both publications over the data collection period.

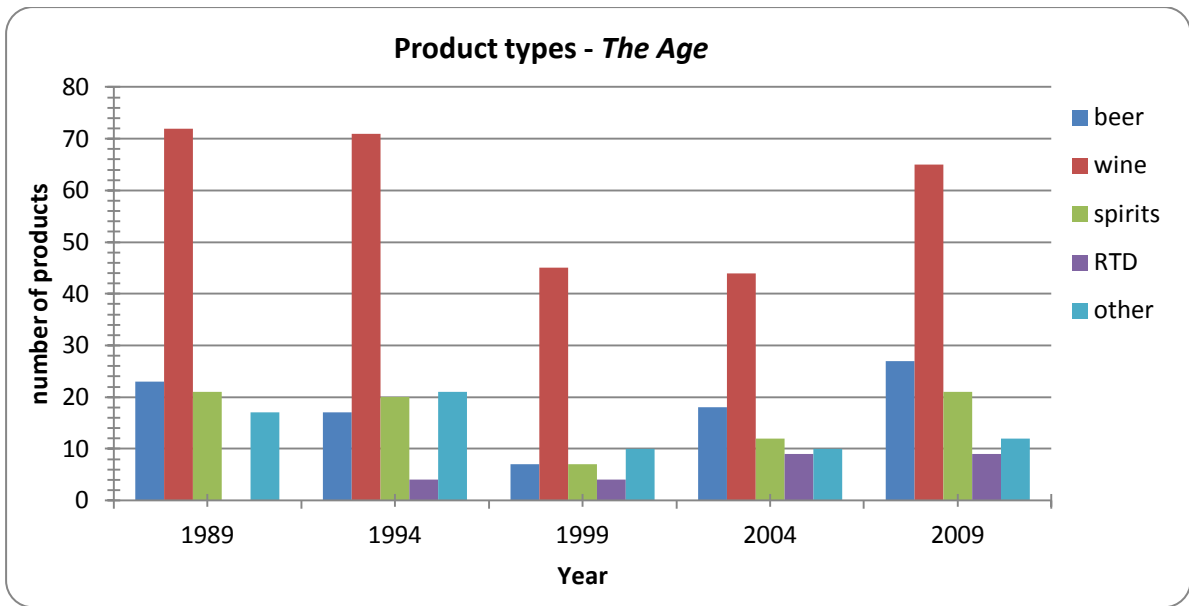


Figure 4: Product types advertised by year – *The Age*

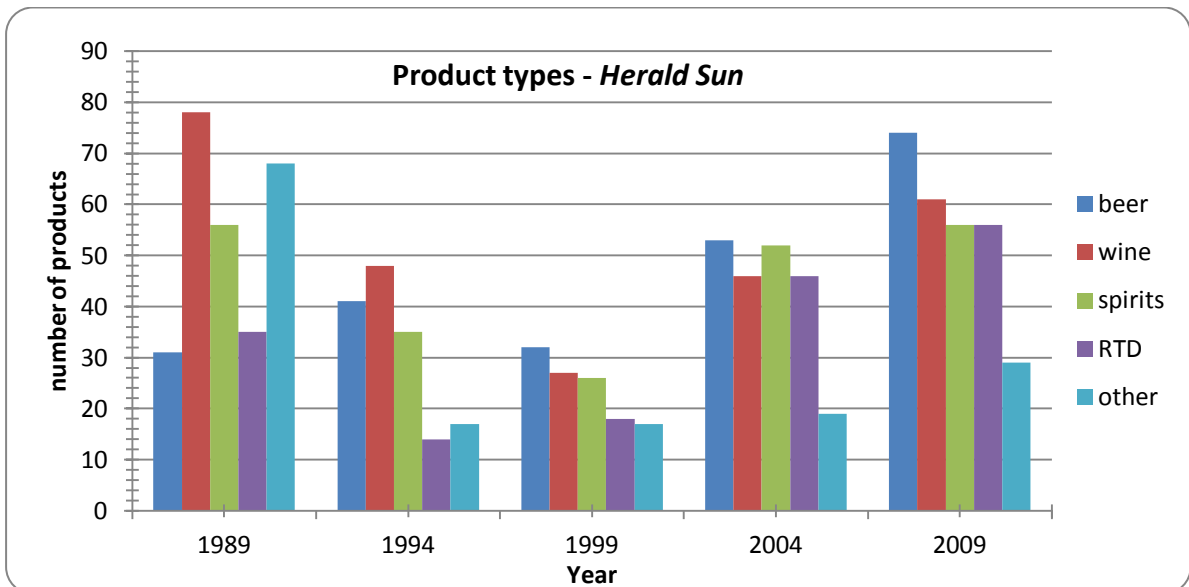


Figure 5: Product types advertised by year – *Herald Sun*

A number of differences were found between *The Age* and the *Herald Sun* regarding the products advertised. As Figure 4 illustrates, wine was the predominant product featured in advertising in *The Age* across the 20-year period. Although the overall numbers varied, the proportion of different product types featured in the analysed editions of *The Age* remained largely consistent from 1989 to 2009. The proportion of beer and spirits advertisements also remained reasonably consistent between 1989 and 2009 while it is noticeable that advertisements for RTDs appeared in *The Age* in 1994 and grew slowly over time.

Compared with *The Age*, the *Herald Sun* featured a more equal distribution of product types across the whole period. Essentially, there is a near equivalence between beer, wine, spirits and RTDs over the later collection points. However, while wine was dominant in 1989 and 1994, beer became the

most frequently advertised product in the newspaper by 1999 and remained so through to 2009.

Of interest is the growth in advertising of RTDs over the period in which they became a more familiar product in the general liquor market. RTD advertisements were more prominent in the *Herald Sun* and were present at the beginning of the data collection period, whereas they did not appear until 1994 in *The Age*. From that point they were marketed more prominently in both newspapers until the terminal collection period in 2009.

4.3 Size of alcohol advertisements

The size of each alcohol advertisement was assessed according to industry standards set out in the table below.

Description	The Age	Herald Sun
	Size	Size
Insert (double column)	68mm	174mm
Half column	60mm x 280mm	60mm x 280mm
Banner	60mm-80mm (depth)	60mm-80mm (depth)
Full column	68mm x (min) 30mm	174mm x (min) 30mm
Quarter page	450mm x 630mm	340mm x 20-28mm
Half page	340mm x 280mm	340mm x 280mm
Full page	550mm x 380mm	376mm x 262mm
Double page	550mm x 786mm	376mm x 550mm

Table 2: Advertisement size specifications

The distribution of different advertisement sizes over the 20 years is illustrated in Figures 6 and 7.

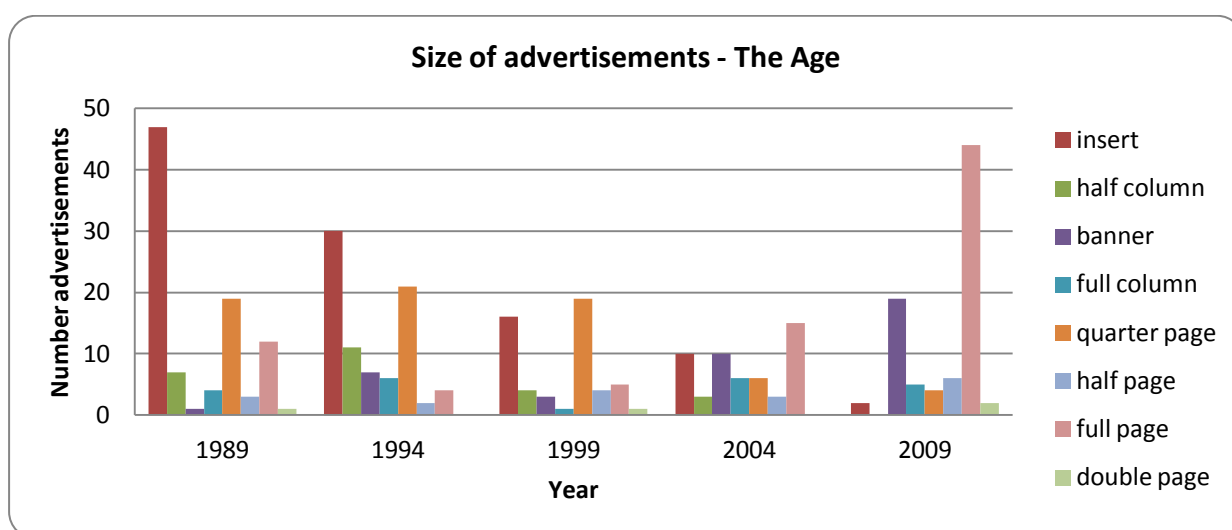


Figure 6: Size of advertisement in *The Age*

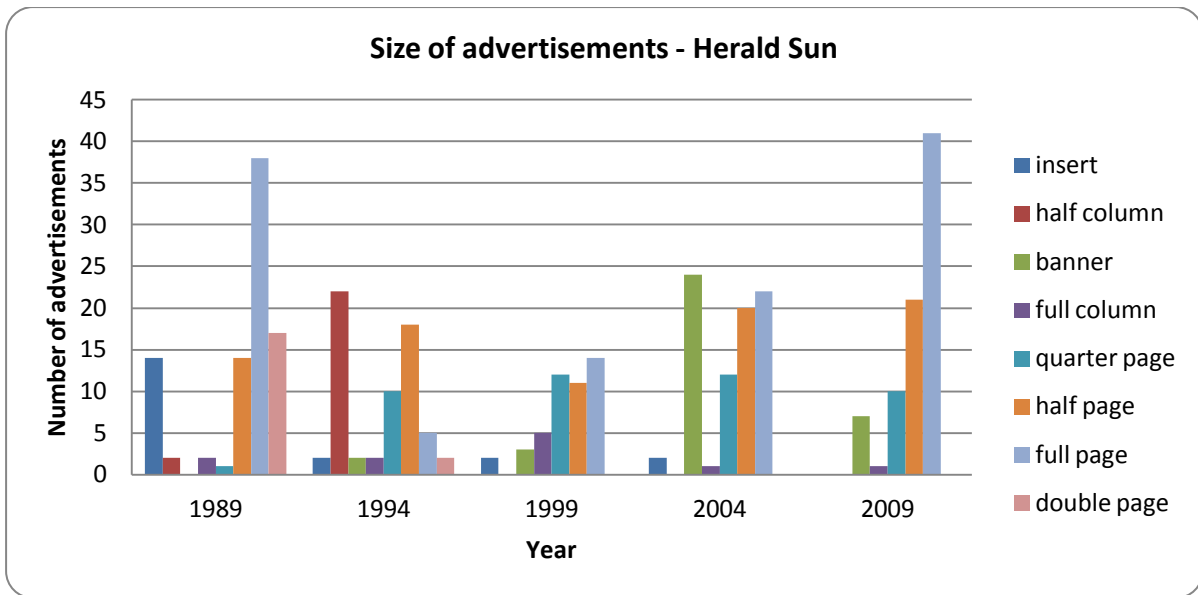


Figure 7: Size of advertisements in the *Herald Sun*

The charts illustrate a clear change in advertisement sizing over the data collection period. For both newspapers, full page advertisements have become the norm. *The Age* shows a strong growth in full-page advertisements from 1999. This represents a clear change from ‘insert’ sized advertisements, which dominated in 1989, typically featuring long lists of products. The *Herald Sun* would show a similar pattern of changes in the size of advertisements but for the inclusion of the *Sun News-Pictorial* as advertisements in that publication were full-page size.

4.4 Style of advertisements

A significant change observed in the style of advertisements over the audit period was an increased use of imagery. In 1989, alcohol advertisements were typically of small ‘insert’ size, displaying long lists of alcohol products accompanied by their retail price. Advertisements were largely monochrome with minimal use of images or large fonts and there was little focus on specific promotional offers, competitions or price discounts. This style of advertisement featured predominantly in *The Age* in 1989 although it was common in both publications. An interesting difference in 1989 was noted between the stablemate newspapers – (the morning tabloid) *Sun News-Pictorial* and (the evening broadsheet) *The Herald*. While *The Herald* featured advertisements similar to those observed in *The Age* in that year, advertisements featured in the *Sun News-Pictorial* were similar to the full page advertisements featured in the newspapers analysed in the latter part of the data collection period.

By 1999 the style of alcohol advertisements had changed markedly. Although the advertisements were increasing in size, fewer products were featured. Larger images increased the focus on individual products and there was more emphasis on promotional aspects such as price discounts, two-for-one deals and competitions. Font sizes had increased, as had the emphasis on branding, and the names of the retailers were more prominent. Those trends continued until 2009 when advertisements grew to a full page and sometimes expanded to double page spreads.

4.5 Placement of alcohol advertisements

The following tables show the number of advertisements displayed in each section in *The Age* and the *Herald Sun*.

Advertisements per section – <i>The Age</i>					
Daily sections	1989	1994	1999	2004	2009
Early General News (EGN): leading section of <i>The Age</i> containing latest local and national news; includes daily editorial and opinion/letters page.	23	16	10	10	26
World News	0	1	5	2	13
Business	0	0	1	4	7
Weather	1	0	1	0	1
Classified	0	0	0	1	0
Sports section	1	5	0	2	8
Non-daily sections					
<i>Melbourne Life</i> (arts and entertainment magazine)	2	5	1	7	4

Table 3: Number of alcohol advertisements in sections of *The Age*

Advertisements per section – <i>Herald Sun</i>					
Section	1989	1994	1999	2004	2009
News (features state and national news items)	2	6	27	52	62
World	0	11	12	2	7
Business and Finance	0	0	0	1	0
Entertainment	2	18	2	17	6
Daily TV Guide (predominantly lift-out featured in the entertainment section)	5	4	0	0	0
Sport	0	21	3	13	10

Table 4: Number of alcohol advertisements in sections of the *Herald Sun*

Over the whole data collection period some variation in the placement of alcohol advertisements within each publication was apparent. While the number of advertisements featured in the Early General News section of *The Age* fluctuated it remained the most popular section for alcohol advertising. Both the World News and Business sections of *The Age* featured a steady growth in the number of advertisements. The number of advertisements placed in the Sports section fluctuated over time but there was an overall increase.

Similarly, the main News section of the *Herald Sun* was the most popular section for placement of alcohol advertisements. The Sport and Entertainment sections also featured a significant but fluctuating number of advertisements. The Sport section of the *Herald Sun* recorded a higher number of advertisements than *The Age*. Only one advertisement was featured in the Business and Finance section of the *Herald Sun* over the entire period, contrasting with the steady growth in the parallel section of *The Age*.

4.6 The advertisers – retailers and producers

For each advertisement, details of the company promoting the product were recorded. These were organised into the following categories:

Category	Description	Example (but not limited to)
Supermarkets	Includes stores that also offer groceries. Liquor is often sold in a dedicated space adjacent to and accessible from the store or on supermarket aisles.	Safeway Coles Foodworks IGA
Large scale liquor stores (liquor barns)	Includes all separate large scale stores that only stock, sell and promote liquor products. These stores usually promote bulk purchases of alcohol.	1 st Choice Liquor Store Dan Murphy's Cellarbrations Liquorland Cheers
Alcohol brands	This category specifically identifies individual product brands as opposed to retail stores.	Carlton United Crown Lager Secret Stone Jack Daniels Wolf Blass
Boutique/specialist	Includes typically wineries or other liquor connoisseurs. Generally have very specific product range.	High Y Cellars Boccaccio Cellars St Kilda Cellars Nicks Fine Wine Merchants
Hotel/bottle shop	Includes licensed venues that advertised both take-away products and products to drink on premises.	United Inn Keeper Bottle Shop The Local Bottle Shop Dick Whittington Bottle Shops

Table 5: Categorisation of companies advertising alcohol in newspapers

Overall, large scale liquor stores (colloquially known as liquor barns) became the most dominant entity that advertised alcohol products in newspapers. The figures below show the distribution of the different types of companies for both newspapers.

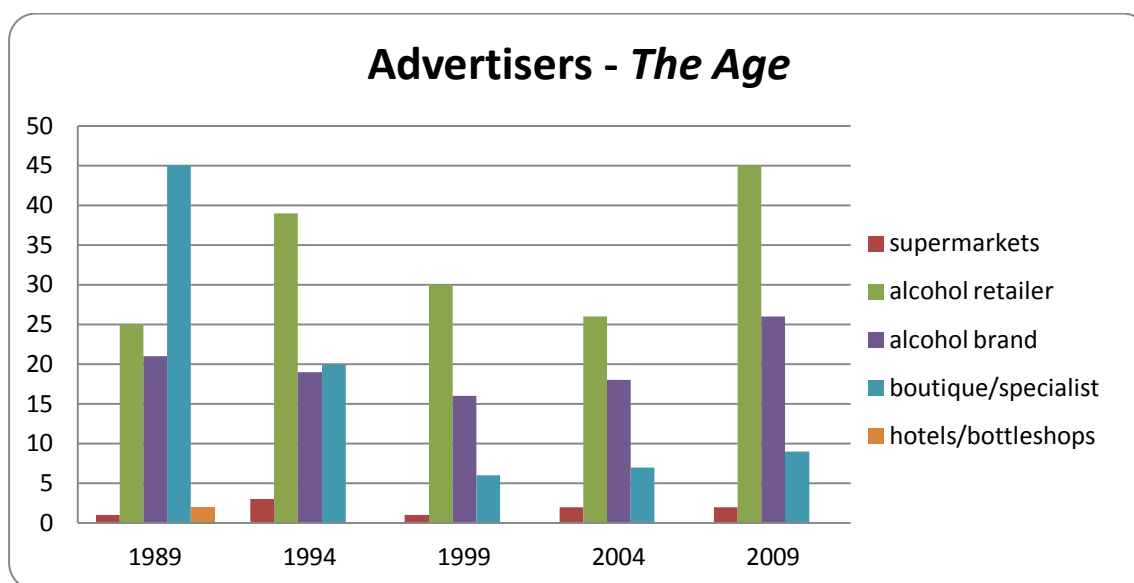


Figure 8: Advertising by business type – The Age

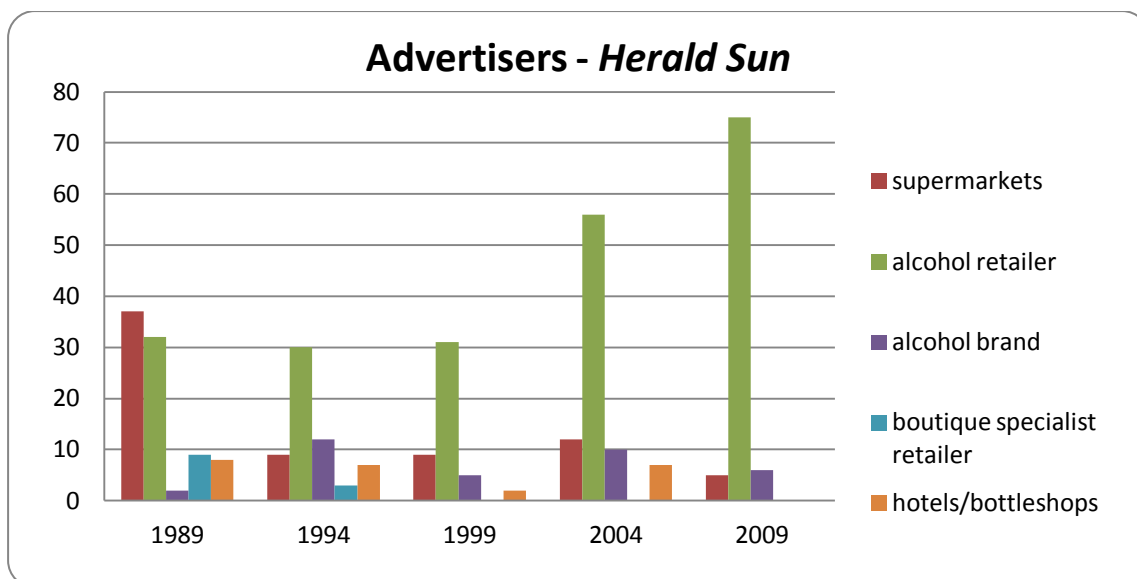


Figure 9: Advertising by business type – Herald Sun

It is evident that major shifts occurred in the source of alcohol advertising between 1989 and 2009. In 1989 large scale stores ('liquor barns') and boutique or specialist outlets were equivalent advertisers (30% and 29% respectively) whereas by 2009 the liquor barns (largely chain stores such as Dan Murphy's and Liquorland) were responsible for 70% of all advertisements, and the advertising share by boutique stores had dwindled to 5%. More specifically, the number of boutique advertisements in *The Age* dropped from 45 to 9, while none were recorded in the *Herald Sun* in 2009. Other results of interest are the disappearance of advertising by hotels and bottle shops and the rise in advertising by alcohol producers. While it appears on face value that the supermarkets also decreased their share of alcohol advertising it is important to understand that most of the large 'liquor barns' are chain stores owned by the Coles and Woolworths supermarket duopoly, so in reality the major supermarkets interests dominate the print advertising of packaged liquor.

The following table compares the source of advertising jointly for both *The Age* and the *Herald Sun* in the 'bookend years' of 1989 and 2009. It summarises the number of advertisements published in the data collection in the two publications and the percentage of the total represented by that number.

Advertiser category	1989 No. (%)	2009 No. (%)
Supermarkets	39 (21.4%)	06 (3.6%)
Liquor barns	56 (30.7%)	120 (73.6%)
Boutique retailers	54 (29.6%)	08 (4.9%)
Producers	22 (12.0%)	29 (17.7%)
Hotel bottle shops	11 (6.0%)	00 (0%)

Table 6: Number and percentage of advertisements per advertiser category in both publications

Table 6 illustrates the dominance of alcohol advertising by the 'big box' liquor barns in 2009. Of a total of 163 advertisements in both newspapers, the liquor barns were responsible for 110 advertisements, close to three quarters of the total at 73.6%; while in 1989 they were responsible for less than one-third (30.7%) of advertisements.

4.7 Seasonal variation of alcohol advertisements

The audit included an analysis of the seasonal distribution of alcohol advertising. It revealed considerable differences between the newspapers, as depicted in Figures 10 and 11 below.

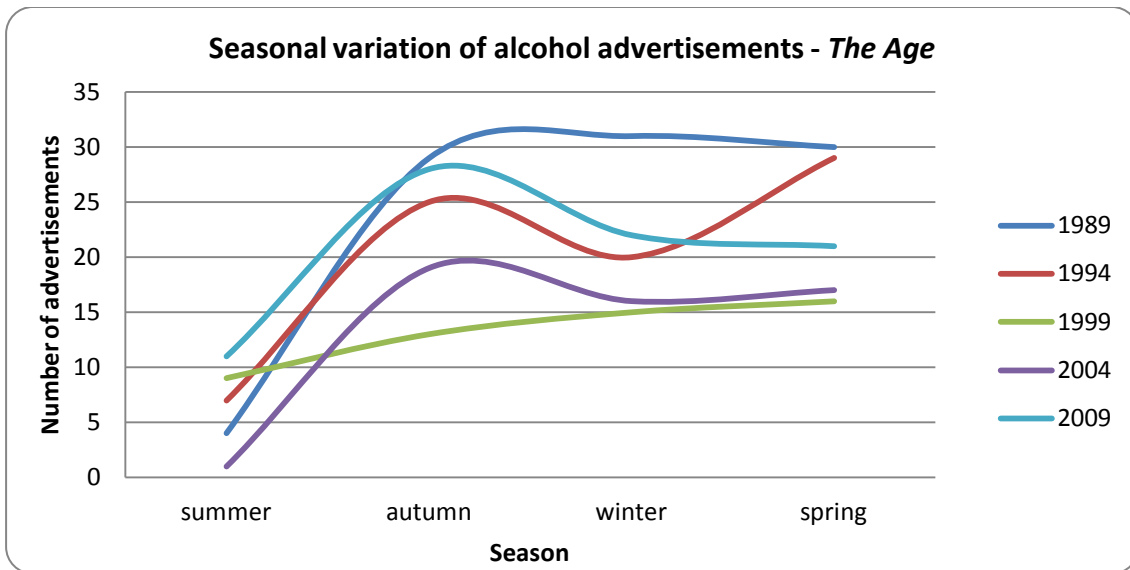


Figure 10: Seasonal variation of alcohol advertisements in *The Age*

Data for *The Age* showed that for each of the five data collection years there were significantly lower levels of alcohol product advertising occurring in summer (≤ 11 advertisements). For each of the following years, the highest seasonal point varied. In 1989, the most advertisements occurred in autumn, while in 1994 and 1999 spring featured the most alcohol advertisements.

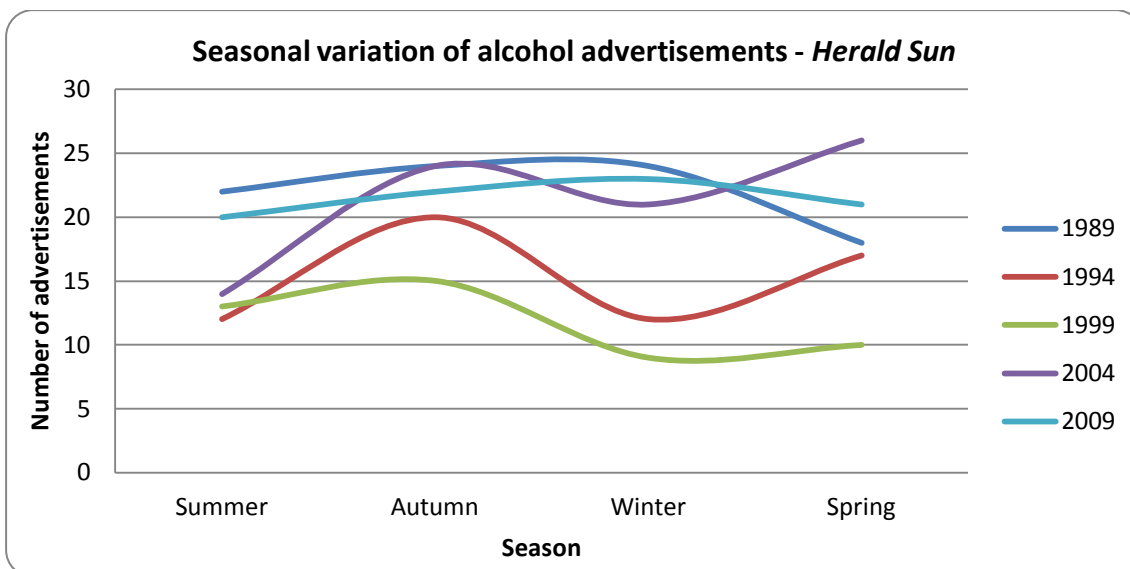


Figure 11: Seasonal variation of alcohol advertisements in the *Herald Sun*

For the *Herald Sun* there is less distinct variation in the seasonality of alcohol advertising. For most years, advertising peaks occurred in autumn and spring. While advertising was generally subdued in summer, 1999 was an exception, with summer being just behind autumn as the major advertising season. In 1989, autumn and winter featured the most advertisements (n=24) while in summer there were 22 advertisements and spring featured 18 advertisements. In 1994 and 1999 the autumn season featured the highest number of advertisements. The least amount of advertisements featured in winter and summer in 1994 and winter in 1999. In 2004 and 2009, the pattern changed with the most alcohol advertising being found during spring for 2004 and in winter for 2009.

5 Findings and discussion

The study provides a snapshot of the nature of alcohol advertising in major daily newspapers in Victoria over the last 20 years. Analysis of particular characteristics of alcohol advertising reveals that some significant changes have occurred in the way alcohol is promoted in the medium.

5.1 Advertisers

Alcohol product advertising in *The Age* and the *Herald Sun* newspapers is now overwhelmingly dominated by large scale liquor stores, known colloquially as 'liquor barns'. That is an important change. In 1989 boutique or specialist retailers sponsored nearly 30% of advertisements in *The Age* and the *Herald Sun*. However, by 2009 advertising in the major newspapers was dominated by large scale liquor stores while advertising by boutique retailers and independent hotels and bottle shops was of minor importance.

These findings might reflect changes in the commercial liquor market resulting from growth of the large supermarket chains. By 2005 Coles Myer and Woolworths dominated the grocery market with a combined market share of 80%. Both companies acquired large holdings in the packaged liquor market by taking over independent alcohol retailers: Coles Myer bought out the Australian Liquor Group and Vintage Cellars, while Woolworths took over Dan Murphy's, Toohey Bros and Liberty Liquor group (Jones, 2005). The two supermarket chains are now predominant in the packaged liquor market and compete against each other and remaining independent retailers by aggressively discounting prices to retail customers.

5.2 Size, style and placement of advertisements

One distinct change over the period concerned the size and style of alcohol advertisements as they became more prominent. Absent now are the small advertisements with long lists of products and descriptions of the name, type, quantity and price of the product on offer. Full page advertisements are now the norm, incorporating more images, larger font types and 'catchy' slogans to encourage consumers. The visual element is more important: advertisements now feature colour images of products, emphasise quantity (for example, cartons of beer), and price promotions such as discounts and associated sales or competitions. The intense competition between large scale liquor stores may have influenced the changing style of newspaper advertising.

The main news section of both *The Age* and the *Herald Sun* remained the primary location for alcohol advertisements from 1989–2009; however, there was a later trend for an increased number of alcohol advertisements to be located in the Sport section. Given the association of alcohol with sport, and public and professional concern over alcohol sponsorship of sport, that trend is worth further investigation.

5.3 Exposure of readers to alcohol advertising

Alcohol product advertisements have become more prominent in daily newspapers over the last 20 years. Greater prominence of alcohol product advertising, combined with the extensive audience who "actively consume" the information in newspapers (Hale & Elliott, 2006), may result in a greater exposure of individual readers to alcohol product advertising. The two newspapers reach a combined circulation of over 700,000 readers daily, increasing to over 950,000 on weekends. The extent and reach of such advertising is notable because independent research into the power of newspaper advertising found that...

because consumers give newspapers their undivided attention and are typically not doing other things at the same time, it's the ideal environment for advertising messages to influence consumer behaviour (Hale & Elliott, 2006, p.12).

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Of significance is the extent to which young people are exposed to alcohol product promotion through newspaper advertising. Newspapers are a highly accessible form of communication and the print media industry acknowledges its reach to a youth audience. *The Age* notes that approximately 99,000 of its readers are aged between 14 and 24 years (Morgan, 2010b). The *Herald Sun* readership of the same age is approximately 170,000 (Morgan, 2010b). Via advertising, this readership is exposed to a broad range of alcohol products, not only beer, spirits and wine but pre-mixed spirits which have been shown to be of particular interest and risk to young people (Munro & de Wever, 2008). This study showed a steady growth in the advertising of RTD products in daily newspapers. In 1989 the advertising of RTD products was relatively insignificant but by 2009 advertising of RTD products accounted for 20% of all alcohol products advertised across the two papers combined. This trend reflects the increasing growth in the RTD product market, which was increasing at over 9% per annum in the data collection period (Munro & de Wever, 2008). Interestingly, the study revealed higher levels of advertising of RTD products in the *Herald Sun*, which has a significantly higher youth readership than *The Age*. In light of the growing body of evidence about the influence of alcohol brand advertising on young people's decision-making and expectations around drinking, the impact of their exposure to alcohol product advertising in print media is worthy of further investigation.

5.4 Regulation of print advertising

Alcohol advertising in the print medium is regulated by the Publishers' Advertising Advisory Bureau's *Guiding Principles for Alcohol Beverage Advertising*. The principles require alcohol advertising, *inter alia*, to be placed where 70% of the audience is likely to be above the legal purchase age for alcohol; to avoid pages that youth are likely to read (e.g. comics); and to avoid depicting characters that are likely to appeal to children. These regulations do not seem appropriate given the findings of this study, which indicate that alcohol advertising is so prominent within the general news sections of daily newspapers that it would not be possible for any person, including a minor, to peruse them without being exposed to a substantial amount of alcohol advertising. The regulations also seem to underestimate the reading habits of children and adolescents as their interests are unlikely to be restricted to the comic sections of newspapers. A review of the regulations governing print advertising of alcohol would seem appropriate given the nature of alcohol advertising in the print medium.

6 Summary of findings and recommendations

Overall, the findings of this study lend support to the thesis that alcohol has been normalised so that it is treated as 'an ordinary commodity' (Babor et al., 2010). In daily newspapers – a staple and trusted form of information and entertainment for many people, including minors – alcohol products are promoted alongside news items and other advertisements. The similarity in style of alcohol product advertising to that of grocery and other consumer items suggest little differentiation between these products. Alcohol product advertising in newspapers has become more prominent. Even while the raw numbers appear not to have changed, the advertisements are larger and their placement in the front pages of newspapers means they are hard to avoid or ignore. Such advertising increases the exposure of the population – including young people – to the marketing of alcohol. Despite the introduction of new social technologies, it is clear that print media continues to be a significant avenue for the alcohol industry to employ to promote alcohol products.

Key findings

- Alcohol advertising is now dominated by large-scale alcohol retailers or 'liquor barns' and advertising by smaller boutique special retailers has diminished.
- There is a trend towards large, full-page advertisements that feature large fonts and colour photographs of products.
- More prominence in advertising is given to the price of products, especially through the promotion of 'special offers' and discounts for 'bulk' purchases of products.
- Alcohol advertising often occupies whole pages at the front of the newspaper where it is difficult for the reader to avoid.
- Advertising of pre-mixed spirits, ready-to-drink beverages (RTDs)/'alcopops' increased markedly over the period, in line with the growth of pre-mixed spirits in the alcohol marketplace.

Implications

- Exposure to alcohol advertising by readers, including young people, has most likely increased as a consequence of the changed character of alcohol advertising in daily newspapers.
- Young people's exposure to alcohol advertising has most likely increased as a consequence of the changed character of alcohol advertising in daily metropolitan newspapers.
- The location and prominence of alcohol advertising in daily newspapers appears to contradict the Publishers' Advertising Advisory Bureau's principles that alcohol advertising should be quarantined from young audiences.
- Alcohol product advertising in daily newspapers is consistent with the notion that alcohol is now treated as an 'ordinary commodity' rather than a specialist product requiring careful treatment.

Recommendations

1. That the results of this study are disseminated to public health policymakers, regulators of alcohol advertising, and researchers into alcohol marketing and advertising.
2. That public health bodies and other interested parties advocate for a review of the regulatory code that applies to alcohol advertising in newspaper on the grounds that it is ineffective in protecting minors from alcohol advertising.
3. That further research be conducted into the subject of print alcohol advertising to establish:
 - i) if the trends identified in this exploratory study are substantial and continuing
 - ii) the impact of print alcohol advertising on young people's attitudes toward alcohol, intention to drink and their actual patterns of consumption
 - iii) the impact of alcohol product advertising in newspapers on consumption trends and the consequences of that consumption
 - iv) how alcohol advertising in the print media compares with alcohol advertising in other forms of media.
4. That future research into this subject should be conducted in partnership with or be informed by practitioners and researchers with expertise in marketing.

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Appendix: Audit tool

Field	Description
ID	The identification number applied to each individual advertisement. <ul style="list-style-type: none"> • H000 – <i>The Herald</i>. This is the weekly newspaper that preceded the <i>Herald Sun</i>. This newspaper did not release a weekend newspaper until 1990 when <i>The Herald</i> and several other weekly newspapers amalgamated into the <i>Herald Sun</i> • HS000 – <i>Herald Sun</i>. • A000 – <i>The Age</i>
Year	The year the analysis was conducted (5 year intervals from 1989 to 2009).
Season	The seasonal period data was collected.
Title	The title of the advertisement used in the newspaper. Where NA has been used, there were no identified alcohol advertisements in this issue.
Section	The section of the newspaper in which the advertisement is located. As the sections across the two newspapers are not identical, coding was applied to similarities between the different sections.
Company	The name of the company responsible for the content of the advertisement.
Size	The size of the advertisement as per standard sizing categories.
Linked promotion	Subjective categories assigned in reference to the advertisement. <ul style="list-style-type: none"> • Price discounts: this is a price discount or percentage discount of particular products across the range. This can include terms such as half-price sale, 10% to 50% (etc.) off, purchase more products for discounted prices (e.g. 30% off when you buy 6 or more bottles of wine). • Price specials: this is the use of anything other than discounted prices. Terms can include, for example, Easter specials, late week specials. This can also include when particular items are offered at lower prices, or two-for-one specials. • Free with purchase: this is when there is another product offered for free when a particular product is purchased. This can include another of the same product or free entry into a competition upon the purchase of a product. • Limited stock: this is when a product is offered at a particular price while stock remains. • Free tasting: while this is not price related, the advertisement is more company focused as opposed to product, and tastings of particular products are offered on arrival or for events. • Quality products: this is the key focus of the advertisement as opposed to a special price or discount. • Not applicable: this indicates that no prices or specials are indicated on the advertisement. This includes sporting sponsorship advertisements.
Product type	<ul style="list-style-type: none"> • Beer • Wine • Spirits • RTD (ready to drink) • Other (this included cask wine, champagne or dessert liqueurs)
Content	An overall description of the content and focus of the advertisement. <ul style="list-style-type: none"> • Price focus: this is a focus on the price of the products. • Product focus: this is less concerned with the price of the product and focuses more on the quality, availability or related media such as sponsorship. • Quality focus: this refers to the focus on the quality of the product. This could include awards won, prestige of the product or a particular vintage. • Sport focus: this is concerned with sport sponsorship. • Celebrations: this is the focus on a particular event to advertise a product. Major events within the timeframes include football finals, Spring Racing Carnival, New Year, Easter. • Brand focus: this refers to a focus that is aimed more at promoting the retailers/winery/brewery as opposed to a particular product. • Social (night time economy): this focus looks at the use/consumption of a

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	product as opposed to price or quality etc.
Average price	The average price of products within the advertisements over the season. Advertisement average price if prices were similar to previous.
Additional information	Includes information that is otherwise not specified.
Prominent events	A note of particular articles of interest that relate to, or may influence, alcohol advertising.



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