



YOUTH ENGAGEMENT WITH ALCOHOL BRANDS IN THE UK



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The authors are solely responsible for the content of the report.

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FOREWORD

It gives me great pleasure to introduce this report investigating teenager and specialist views on the role of alcohol brands and branding in youth alcohol consumption.

Alcohol consumption is responsible for 5.9% of all deaths worldwide and 25% of all deaths in 20-39 year olds in Europe. Furthermore, it is linked to around 200 health conditions – including 7 types of cancer. In the UK alone, alcohol is associated with around 12,800 cases of cancer annually. Cancers linked to alcohol, include bowel and female breast – two of the most common cancers – as well as oesophageal, which is one of the hardest to treat.

Although there have been some recent declines in alcohol consumption in the UK, per capita consumption remains amongst the highest in the western world. Furthermore, drunkenness has been experienced at least twice by around 30% of UK 15 year olds, underscoring the levels of underage drinking.

This report examines one of the key aspects of a young person's environment that may influence behaviour – advertising and promotion. It explores, from young people's own perspectives, the impact brands have on teenagers and how branding appears to influence choice and preferences from a young age. The extent to which the study participants were aware of and spoke about the brands, highlights how effectively alcohol brands have permeated young people's lives.

To the extent that this permeation then influences youth alcohol consumption, this could also lead to an increase in the numbers of alcohol related cancers in the future. The second report will highlight that many specialist views of current UK regulation on alcohol as inadequate in protecting young people and will express the need for more regulation.

Combined with other studies finding significant associations between exposure to alcohol marketing and youth drinking behaviour, this study, and in particular its presentation of the voices and perceptions of young people themselves, adds support to the case for more regulation of alcohol marketing, especially when this marketing is accessible to the underage population. While youth familiarity with and awareness of alcohol brands is clearly quite high, there is also a need for greater awareness of alcohol's relationship with cancer across the entire population, with 9 in 10 people in England unaware of the link between alcohol and cancer.

If current alcohol consumption trends continue, alcohol will lead to an estimated 135,000 cancer deaths over the next 20 years and £2bn in cancer costs to the NHS. In doing all we can to prevent cancer, there is a need to start early in life by enhancing protections for young people against activities such as marketing that may influence them to begin using cancer-causing products like alcohol at a young age.

This report was commissioned by Cancer Research UK's Policy Research Centre for Cancer Prevention. This Centre is part of Cancer Research UK's commitment to support high quality research to help build evidence to inform policy development on topics relevant to cancer prevention, including alcohol.



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EXECUTIVE SUMMARY

Alcohol consumption is believed to be linked to approximately 12,800 cancer cases annually in the UK¹ and is linked to seven types of cancer, including two of the most common, female breast and bowel²⁻³. If current alcohol consumption trends continue, it will lead to an estimated 135,000 cancer deaths over the next 20 years and £2bn in cancer costs to the NHS⁴.

Levels of alcohol consumption in the UK for 15 year olds remain amongst the highest in the Western World⁵. In 2014, 38% of 11-15 year olds in England reported ever trying an alcoholic drink⁶. Whilst the root causes of under-age drinking in Britain are undoubtedly complex, industry claims that their marketing merely influences switching between brands and do not affect overall consumption does not accord with the evidence⁷⁻¹⁰.

The aim of this study was to:

- Examine ways in which alcohol marketing influences teenagers

Qualitative focus groups were conducted with youths in Bristol and Scotland. Interviews with academics and public policy specialists were held to discuss current and future options for controlling industry marketing.

FINDINGS

YOUTH FOCUS GROUPS

- Young people indicated that some alcohol brands were better known, better regarded and consumed more frequently by youth than other brands.
- Brands with brightly coloured packaging and with high levels of added sugar were seen as particularly

attractive.

- Ciders were consumed to relax and high strength spirits were used to get drunk.
- Gender, age and social class played a role in the way young people responded to different brands. For example, some drinks were seen as beginner's drinks that thirteen year olds would drink, and others were perceived to be what their grandparents would drink.
- Price and accessibility play a role in what products young people buy.
- Although some alcoholic brands were perceived as appealing to some genders, such as beer for males and pre-mixed vodka for females, some ciders appealed to both genders.

POLICY AND PUBLIC HEALTH IMPLICATIONS

Government should review the efficacy of current restrictions on when and where alcohol advertisements are shown and consider how best to minimise young people's exposure to this marketing.

Government should take a comprehensive approach to reducing youth drinking in the UK. This should include measures to reduce the appeal of alcoholic drinks and reduce the affordability of these drinks.

Further research is needed to investigate further the links between brand-specific marketing activity and under-age drinking behaviour in the UK, preferably with a longitudinal survey.

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INTRODUCTION

Alcohol is a significant contributor to the global burden of mortality and disease, accounting for 5.9% of all deaths and 5.1% of the global burden of disease every year¹¹. It has been linked to over 200 health conditions, including heart disease, stroke, diabetes¹² and seven types of cancer¹³. Overall, 5.5% of cancer cases and 5.8% of cancer deaths were attributable to alcohol worldwide in 2012¹⁴. If current alcohol consumption trends continue, it will lead to 135,000 cancer deaths in the UK over the next 20 years and £2bn in cancer costs to the NHS¹⁵.

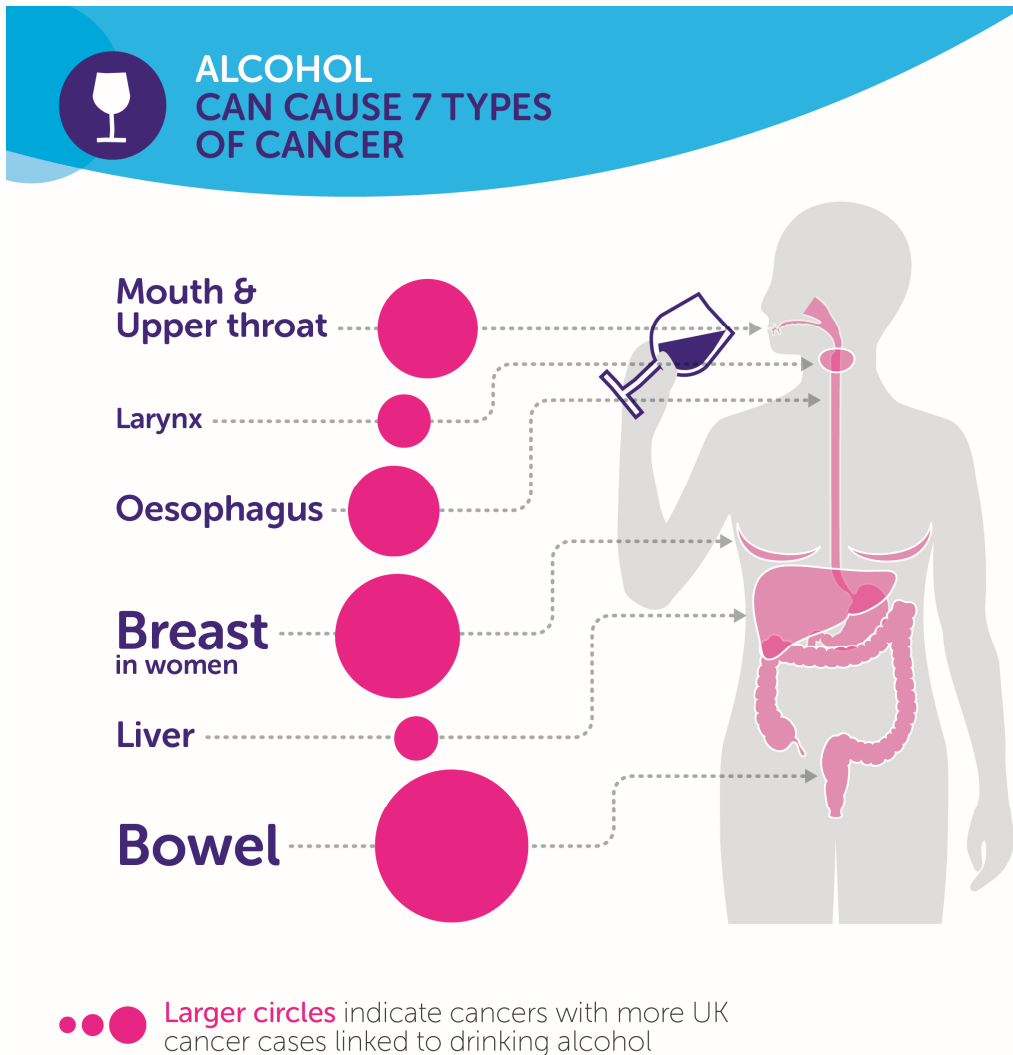


FIGURE 1 CANCER CASES LINKED TO DRINKING ALCOHOL

Alcohol consumption during any stage of childhood can have a harmful effect on a child's development. Alcohol use during the teenage years is related to a wide range of health and social problems, and young people who begin drinking before the age of 15 are more likely to experience problems related to their alcohol use¹⁶. This is a result of young people typically having a lower body mass and less efficient metabolism of alcohol. Additionally, the

psychoactive effects of alcohol disproportionately affect motor control and coordination hence increasing injury events and related trauma. Young people also exhibit a typically low-frequency, high-intensity drinking pattern that leads to intoxication and risk-taking behaviour¹⁷⁻¹⁹.

Although drinking in the UK in 11-15 year olds has declined since the early 2000s, drinking levels in 15 year olds in the UK still remain amongst the highest in the Western World²⁰. In 2014 38% of 11-15 year olds in England reported ever trying an alcoholic drink²¹. In the UK in 2013-2014, 33% of 15-year old girls and 28% of 15-year old boys in the United Kingdom reported having experienced drunkenness at least twice in their lifetime²². Binge drinking is a particular issue amongst young people (aged 16-24) who are the age group most likely to have drunk very heavily (more than 8 units for men and 6 units for women on a single day) at least once during the week²³. However, substantial numbers of those even younger are also drinking. In 2014, 69% of 15 year olds had drunk alcohol in the last week²⁴.

The root causes of underage drinking in Britain are undoubtedly complex; however, marketers' claim that their marketing merely influences switching between brands and does not affect overall consumption²⁵ do not accord with the evidence of studies undertaken in the alcohol sector. Alcohol advertising and other promotional activity have consistently been shown to be associated with initiation and progression of alcohol use among young people, as well as the development of pro-drinking attitudes and social norms²⁶⁻³⁰. A 2015 survey of 10-11 year olds in England and Scotland found greater recognition of alcohol brands than food brands, with recognition of characters in a lager advert higher than any equivalents for food brands³¹. Identification with desirable images in alcohol advertising has been seen in 8-9-year-olds and brand-specific consumption has been found among 13-20 year-olds³²⁻³³.

These concerns prompted an examination of the current regulations on alcohol marketing and consumption relating to children in the UK. The most important restrictions include youths under-18 not being permitted to buy alcohol in the UK, alcohol adverts not 'targeting or appealing strongly to under-18s' and restrictions on advertising on television during or around children's programmes³⁴. The product placement of alcoholic drinks on television has also been prohibited³⁵. However, given underage drinking levels, these measures may be inadequate. Some programmes broadcast during peak viewing times are still allowed to carry alcohol advertising (not least popular family shows) because they do not attract a 'disproportionate' number of under-18 viewers – even though they do attract a high number (in absolute terms) of under-18 viewers. Several media – in particular social media – remain unregulated, allowing for the continued exposure of minors to alcohol marketing. These inadequacies are symptomatic of the underlying deep-seated problem with all regulation of this type, which is that these restrictions have been placed on media use rather than marketing outputs. The brand appeal and brand propositions that marketers create to attract consumers are therefore the focus in this study.

Regulatory concerns in the UK are echoed internationally. In May 2010 the 193 Member States of the World Health Assembly unanimously adopted the World Health Organization (WHO) Global Strategy to reduce the harmful use of alcohol³⁶. The Strategy focused on key policy options and interventions for alcohol marketing by regulating the content and the volume of marketing, including setting up regulatory or co-regulatory frameworks, preferably with a legislative basis and supported when appropriate by self-regulatory measures. Legislation has been identified as cost-effective for reducing the harmful use of alcohol (WHO refers to alcohol

marketing restrictions as a ‘best buy’³⁷). The implementation of this Strategy has become even more pressing following the adoption of the WHO Global Action Plan on the prevention and control of non-communicable diseases (NCDs) for 2013-2020, which urges Member States and the international community to implement the Strategy and ensure at least a 10% relative reduction in the harmful use of alcohol by 2025³⁸. The UK has agreed to these strategic aims.

Regulatory solutions vary internationally. Three categories highlighted here are examined later in the second report from this study, ‘*Specialist views of alcohol marketing regulation in the UK*’:

1. The UK’s relatively ‘light touch’ option, co-regulation, involves the industry regulating itself with some control from government. Control comes from Ofcom, the communications regulator, and the Advertising Standards Authority, whilst self-regulation is administered by the alcohol industry-funded Portman Group.
2. A stricter alternative, binding legislation, as illustrated with the French ‘*Loi-Evin*’. *Loi-Evin* established rules in law which advertisers must follow; most notably that the law instructs advertisers on what they can say (largely limited to factual information about the product) rather than what they cannot³⁹.
3. An additional alternative is the so-called Performance Based Regulation (PBR) option, proposed by Sugarman in 2009⁴⁰. PBR suggests a non-prescriptive approach by setting public health related targets to industries that are deemed to be causing problems. If, for example, a particular brand is shown to have particular youth appeal its owners could be required to reduce this appeal within a given timescale.

Levels of drinking continue at worryingly high levels amongst children, and industry marketing appears to be closely associated with this. The research aim for this study was therefore to explore how the marketing of specific alcohol brands may affect teenage drinking.

METHODOLOGY

AIM

The main aim of this study was to:

- To learn more about how youths (13-18 year olds) reacted to specific alcohol brands and the effect that this had on their drinking behaviour.

RESEARCH DESIGN

To gain an in-depth understanding of youth perceptions and attitudes towards alcohol brands, a qualitative approach was taken. Twelve focus groups were conducted in England and Scotland in February/March 2016.

SAMPLING & RECRUITMENT

For the teenage focus groups recruitment procedures were controlled by the lead researchers at the University of Stirling and UWE-Bristol. At UWE-Bristol two schools were used as venues with permission obtained from each school alongside participant and parental consent. A professional recruiter was sub-contracted to find participants, obtain consents and host the groups. At the University of Stirling market research consultants were commissioned to recruit and host the groups from two communities within East and West central Scotland. Participants were identified from a combination of street intercepts and door knocking.

A convenience sample of 13-18 year olds was accessed at both sites, with focus groups created that reflected specific age groups and genders. Constituents of each of the focus groups are shown in Table 1.

Table 1 BRISTOL/STIRLING FOCUS GROUP PARTICIPANT DEMOGRAPHICS

Bristol based groups	Stirling based groups
1. Aged 13-14, boys ABC1*	7. Aged 13-14, boys C2DE*
2. Aged 15-16, boys C2DE*	8. Aged 15-16, boys ABC1*
3. Aged 17-18, boys ABC1*	9. Aged 17-18, boys C2DE*
4. Aged 13-14, girls C2DE*	10. Aged 13-14, girls ABC1*
5. Aged 15-16, girls ABC1*	11. Aged 15-16, girls C2DE*
6. Aged 17-18, girls C2DE*	12. Aged 17-18, girls ABC1*

* refers to the social economic status of the young person:

AB Higher & intermediate managerial, administrative, professional occupations

C1 Supervisory, clerical & junior managerial, administrative, professional occupations

C2 Skilled manual occupations

DE Semi-skilled & unskilled manual occupations, Unemployed and lowest grade occupations

FOCUS GROUPS

A short online content analysis of user-generated content within alcohol brand sites was firstly undertaken. This sought material that demonstrated brand engagement by teenagers, hence

providing initial insights that we used in creating our topic guides.

Key areas included in the guides were:

- List all the alcohol brands you can think of
- Brand preferences and dislikes
- Brands, drinking and personal identity
- Debrief and closing

Alcohol brands were primarily selected by youth focus group respondents themselves (in a qualitative equivalent of unprompted awareness). The first activity involved respondents in pairs listing out all the alcohol brands they could think of on post-it notes and then sharing these with the group. Secondly, (in a qualitative equivalent of prompted awareness) further brands were shared with the group by the moderator from a long list created from the Mintel Report of the top 100-selling brands in the UK in 2015 and recognition was checked. The group respondents picked out a mixture of youth-oriented and adult brands from the Mintel top 100-selling list of 2015 (see Appendix 1).

The fieldwork was carried out by qualitative researchers at University of the West of England (Dr Yvette Morey) and University of Stirling (Mr Douglas Eadie and Dr Richard Purves).

INCENTIVES

LovetoShop vouchers (value £15) were provided to each focus group respondent as an incentive and thank-you for participating.

DATA ANALYSIS

All of the focus groups were digitally recorded with the consent of the participants and then fully transcribed. At the University of Stirling, transcripts were re-read by the researchers responsible for conducting the groups and data extracted in accordance with the discussion themes and emerging issues. Indicative quotes have been used to illustrate the findings. To support the analysis a brand matrix was developed to summarise brand perceptions for each group.

At UWE-Bristol the approach taken was to read through the transcripts and to code all words with codes determined emergently by initial reading of the transcripts. Codes included descriptors such as feelings, taste, appearance, smell, strength, size, cost, intoxication and availability. In turn these descriptors were linked with respondent demographics, alcohol brands, likes and dislikes and so forth. The intention was to provide an initial, qualitative content analysis of the views and experiences expressed by the teenagers, identifying similarities, differences and emergent explanations for particular experiences or opinions of how teenagers engage with alcohol brands.

ETHICS

Ethical approval was granted by UWE-Bristol, the lead university, on the 21st January 2016. (approval number FBL.15.12.019).

FINDINGS

BRAND APPEAL

The key aim of the focus groups was to understand young people's perceptions of different brands and how they may impact drinking behaviour. One of the first domains explored was brand appeal. Themes that emerged from the focus groups included:

- Brand recognition
- Taste, flavouring and colour
- Package design
- Strength of alcohol
- Price and accessibility,
- Reputation and trust
- The effect of advertising
- Influence of peers
- Brands they thought should be scrutinised.

BRAND RECOGNITION

Many national brands were recognised both in Bristol and in Scotland, whilst others were regional in nature. Participants (only those from Bristol were counted) recognised 80 different alcohol brands – taken from questions on brand awareness, likes and dislikes, as well as general discussion.

Most of the brands were established and well recognised national brands; however, a few reflected a stronger regional connection to the South West. A diverse range of cider brands were represented including white ciders, large volume economy ciders, and established mass-market ciders, including one brand that had recently diversified into a number of fruit-flavoured sub-brands.

A number of newer products and brands with particular appeal to a youth market were reflected in the list, including several schnapps-based alcopops, as well as vodka-based alcopops. The presence of a tequila flavoured beer is interesting as [market data](#) point to the emergence and growth of the 'speer' (spirit-flavoured beer) category and the attempt by brewers to reposition beer, making it more attractive to both younger men and women. For a smaller number of brands, familiarity was based on family tradition, holidays and get-togethers (Appendix 1).

TASTE, FLAVOURING AND COLOUR

Drinks that replicated the sweet, fizzy characteristics of soft drinks were particularly popular, especially amongst females.

Drinks that tasted of fruit or sweets were seen as actually masking the taste of alcohol which was appealing:

- *And [liqueur] because it's like chocolate but like alcohol. (G2, Bristol)*
- *They taste really nice; they taste like sour sweets. (G4, Bristol)*
- *I don't know, it is just like, it is nice, it's like squash, not squash, I don't know. I don't know, it doesn't taste alcoholic. (G3, Bristol)*

- *It's [cider] a bit like drinking diluting juice, but with alcohol. (G1, Stirling)*

Some participants felt that this was a deliberate strategy to make the drinks more appealing to younger consumers:

- *It's more modern, orange flavoured... like [orange flavoured soft-drink] and stuff like that... (G1, Stirling)*
- *I think I only took that because it was bright. (G3, Stirling)*
- *An' I think they're trying to maybe make it more accessible for us. (G1, Stirling)*

Conversely, drinks that tasted of alcohol were often not appealing.

- *I think it's very strong [gin brand], like, I think sometimes if, like, I, like, see people drinking it an' I smell it, I think it smells a wee bit like nail varnish remover. (G2, Stirling)*

Within some groups the **colour and appearance** of the drink itself was very important – drinks that were colourful (reds, oranges, blues and greens) were preferred, as well as drinks that were lighter rather than darker in colour. The latter was associated with stronger, more masculine drinks.

- *I put [cider] because it just looks nice, like gold and fizzy. (G2, Bristol)*
- *Colourful ones are less strong, like, to taste, than if you were to drink, like, a straight, like... (G1, Stirling)*

PACKAGE DESIGN AND FORMAT

Package design also appeared to influence product choice and appeal. Younger female participants found packaging with vibrant colours (or where the brightly-coloured liquid was visible through the glass packaging) appealing.

- *That's appealing to me because it's like bright and the packaging is quite nice (G5, Stirling)*
- *They actually have taste, like flavour. The packaging is always good. Like [fruit cider] the way they do the different type of dark fruits like strawberry or pear, like dark colours. (G4, Bristol)*

In addition to the colour and look of the brand packaging, the type of bottle and logo were also important.

- *The bottle looks funky.*
- *I like the bottle and the logo.*
- *I feel cool drinking it! Go round [local town] with the bottle! (G3, Bristol)*

Pre-mixed products in single-serve bottles and cans were also popular. In some cases, they actually served to reposition relatively unattractive products as something that might appeal to a younger consumer. For example, many were dismissive of [whisky] in its conventional 70cl format. However, interest was often sparked when presented with the same product pre-mixed with cola in 330ml cans.

- *Though, obviously, it's not gonnae get you as bad as if you're...pouring your own whisky an' coke, kinda thing... boys'll probably go for the actual bottle o' whisky an' personally some o' the girls I hang about with go for the wee cans an' stuff. Just 'cos I think, be a lot more capable an' we'd rather have something small. (G2, Stirling)*

Similarly, many participants found large two-litre bottles of cider very unappealing in terms of their design, taste and associations. However, the 'cider dark fruit' variety, which is mixed with blackcurrant and blackberry, was seen as much more appealing in terms of its taste and branding:

- *I think of jakies [alcoholic street drinkers] when I see that [big bottle of cider]. (G1, Stirling)*
- *[fruit flavoured cider], that's totally different from the [unflavoured cider] even though they're, like, the same brand. (G1, Stirling)*

STRENGTH

Alcohol content was an important factor guiding choice and appeal. This appeared to be particularly important amongst respondents in Scotland. For many participants this was situation-dependent in terms of context and/or mood:

- *It depends on the occasion, like if there is a party you want to choose stuff to get drunk. (G3, Stirling)*
- *It depends on what you are drinking for as well, if you are just chilling then like you will have a cider or whatever and then obviously if you are going to a pub you might have a bottle sort of or if you are going to get pished then... (G4, Stirling)*

For example, if their aim was to get drunk, they would often choose a bottle of vodka. However, if they just wanted to relax, they would choose a product that they found more pleasant to drink and which they believed had a lower alcohol content:

- *If you don't want to get too drunk, just take a couple o' bottles o' them so it's quite handy for that [fruit flavoured cider]. (G2, Stirling)*
- *I'd say if you were at a party and you didn't want to get drunk because say you're coming home after or something, then that's [fruit favoured cider] a good option. (G3, Stirling)*

PRICE AND ACCESSIBILITY

Price and accessibility had a significant role to play in brand selection at this age. Value for money in terms of the products' ability to get you drunk was in some cases a key consideration. Boys in particular talked in these terms, with some ranking their choice of beer by price:

- *You just want to get ***** for a low price. (G3, Bristol)*
 - *So, on the whole would you say that, if you were going to go out and buy a drink, what is the main thing that's important?*
 - *Strongest, cheapest drink that will get you plastered pretty quick. (G3, Bristol)*
- [cheap lager] is always like the cheapest beer they will have. (G4, Stirling)*

Brand selection also depended on what the young people could get access to or what was easily available to them. Some products were perceived to be more readily available through local corner shops on special deals, for example, large bottles of cider, lager multi-packs, or heap [a tonic wine]:

- *It means that people are more likely to have it [mainstream lager], so it's a lot easier to get hold of. (G3, Stirling)*
- *I think [tonic wine] is made to be cheap an' it's affordable to buy an' it's easier to get I think. (G1, Stirling)*

For some participants (especially younger teenagers) it could depend on what their parents were prepared to provide them with.

- *It's [alcopop] the first thing your parents buy you because it's so weak but it's really tasty (G6, Bristol)*

REPUTATION AND TRUST

Some brands were perceived to be more trusted and to have a better reputation than others. Participants spoke about finding a balance between brands that were recognisable but not the most expensive. It was important not to be seen with the wrong brand:

- *Yeah but you have to go for a brand that likes in between [supermarket] value and the most expensive. Not too much but you don't want to look like you have no money. (G3, Bristol)*
- *Things like get a reputation. Some things attract you. Like [whisky brand] like you say you see them on a t-shirt. (G3, Bristol)*

Trust was important. For example, a well-known vodka was seen as much 'safer' choice and more trusted than [a brand local to Scotland] that would often only be purchased when they did not have enough money for [well-known brand].

- *"I guess that's a [well known vodka brand] as well so you ... can trust it.*
- *It's better for you [well known vodka brand], I think, than [local brand]. There's a lot o' oil in [local brand], I think. It's full o' oil... I just, I know the fact that it's got, it's better for you, an' [local brand] quite bad for you... I think, just the stuff in it, it's bad for you". (G2, Stirling)*

Similarly, [American lager brand] was also perceived to be a widely advertised and consumed brand which gave it a degree of credibility and appeal:

- *Because like it's quite a well-known one [American lager] like a lot of people drink it so you know it's not terrible. (G3, Stirling)*
- *"Also yeah, you see it everywhere [American lager] is heavily advertised, so that's probably why I grabbed it". (G4, Stirling)*

ADVERTISING

There was relatively little mention of advertising as important to shaping a products appeal. Some campaigns were more widely mentioned than others, most notably the long running campaign for [well known Australian] lager and its perceived ability to speak to 'the common man':

- *[Australian lager] is like aimed as if you were like us, so it makes it... it appeals more to us than other brands. (G3, Stirling)*

There were relatively few references made to other marketing approaches, although a number of respondents did make reference to the apparent use of brand stretching by an American whisky, which was widely noted for the sauce by the same name in an American restaurant chain, an outlet popular with young people:

- *[restaurant]s have got, like, food with that [American whisky] in it. (G1, Stirling)*
- *I kind of like the look of that one because it's like you can get a sauce version of that at [restaurant]. (G5, Stirling)*

PEER INFLUENCE

Participants across both sites made reference to peer influence in guiding drinking behaviour. This factor was considered to be more relevant when you were younger and just starting to experiment with alcohol.

- *I think it's like, I would rather follow the crowd and like have something different, I just feel like... They all judge you probably. Even though it is just a drink I feel like it is best*

to follow what everyone else does. (G5, Bristol)

Some brands were associated with novice drinkers while others were seen to be the choice of more mature and discerning consumers.

- *Like you go through like stages. As you get older like everyone years ago would drink [pre-mixed cocktail drink] because it was cheap whereas nowadays we think like that disgusting, cheap and all that and like with all the older drinks, the [cider brand] or whatever it was, like now we think, oh old man's drink and all that but in 10 years' time we will be all drinking that and saying [youth oriented cider, vodka] is all a bit naff. It changes... (G6, Bristol)*

BRANDS RECOMMENDED FOR SCRUTINY

Towards the end of some of the discussions (only asked in the Stirling focus groups) participants were asked if there were any brands that they felt merited special attention or scrutiny by regulators. In addition, moderators noted brands that appeared implicitly by respondents to be exclusively aimed at themselves. Three main brands emerged from these discussions, a cheap tonic wine, a grape wine and an alcoholic energy drink, all of which were associated by respondents with intoxication and youth drinking:

- *It's cheap [cheap tonic wine brand]. It's really cheap an' it gets you ...It gets you drunk faster. (G2, Stirling)*
- *It's got a reputation for it being – like it is going to get you drunk fast [cheap tonic wine brand]. (G3, Stirling)*
- *You wouldn't really see an adult with, like, a [youth oriented grape wine]. (G1, Stirling)*

There was very little conventional, above-the-line marketing for these products which may contribute to their apparent under-world or other-world status. Whilst many mocked these products, some, most notably a cheap tonic wine brand, were responsible for attracting a degree of reverence, with some referring to them in more colloquial terms.

- *Everyone knows what [colloquial nickname] is.... cultural icon.... You see it on the streets, you see it everywhere. (G4, Stirling)*
- *I think that's quite like [cheap tonic wine brand], they're basically the same thing, they hold the same, like, image', kind of iconic, [colloquial nickname] it's kind of a more modern [cheap tonic wine brand]. (G1, Stirling)*

These values would appear to be reinforced by their portrayal in social media and on drinkers' Facebook pages, which though often referred to in mocking terms, clearly served to catch the attention and interest of young people, and were a frequent talking point:

- *You see it a lot if, like, if people put up pictures from the weekend... no make-up on an' holding a bottle of one of, like, a bottle of [cheap tonic wine brand] An' there's like a, like, pose that goes with it. It's, like, they have it in their hand an' they're, like, their arm around their mate... Aye, they'll be, like, standing like that wi' their mates an' they'll have their thumbs up. (G1, Stirling)*
- *I've seen people in photos they've got like their [cheap tonic wine brand] in their hand and stuff at parties. (G5, Stirling)*

An alcoholic energy brand was seen to be a relatively new product and as previously noted was believed to appeal to a similar market. It was seen to have certain potent qualities which were reinforced by its credentials as an energy or caffeinated drink. Indeed, these credentials were a common focus of concern, with the choice of packaging, the package design and retail strategy of displaying next to non-alcoholic energy drinks leading many to believe the

manufacturer was deliberately trying to conflate the two markets:

- *They maybe should acknowledge how they're using, like, marketing tactics to get to younger people. Like, the flavours an' the colours, an', like, maybe mixing it with an energy drink to, like, lure you in a wee bit. (G1, Stirling)*

Indeed, the effectiveness of this strategy was borne out by the response of at least one younger participant who thought it was an energy drink.

The analysis also identified vodka as a potential problem category for young drinkers. Although this was not recommended for scrutiny by the participants themselves, vodka was the most frequently mentioned alcoholic drink and described as being widely consumed and misused by young drinkers:

- *What kind of drink do you see at parties?*
- *Vodka! Lots of vodka! [Laughter]. (G2, Stirling)*
- *Every house party that I've ever been to there is always vodka... It's one that gets abused. (G4, Stirling)*
- *Vodka an' stuff but it does gie you a really bad headache, in the morning after but, vodka sends you wild mair than what that does [wine]. You can be merry an' happy on one bottle o' that [wine]. Whereas, one bottle o' vodka an' you can be legless, lying in a bush somewhere, no' knowing, paralytic. (G2, Stirling)*
- *Stuff like vodka an' gin can be quite harmful. Like, especially vodka cos people tend to, like, take straight shots of it instead of mixing it...*
- *I just associate vodka with younger. (G5, Stirling)*

Vodka particularly appealed to young people: it was accessible, it was versatile and most notably it delivered rapid intoxication:

- *It's cheap, it's easy to get... It gets you drunk quicker. (G4, Stirling)*
- *Like, say you an' your friend, 'Oh, we'll half in for, like, a 70 o' vodka' or 'We'll half in for,' something like that. (G1, Stirling)*

During these discussions, unlike other brands discussed, vodka advertising was highly recalled, highlighting the need for scrutiny of the marketing for these products and their brand equity.

DEMOGRAPHIC DIFFERENCES

The findings relating to brand appeal were contingent on gender, age and social grade. In this section we explore these differences in more detail.

GENDER

The findings indicate that youth drinking is strongly gendered. In Scotland this was more often expressed in relation to drink category rather than by specific brand (for example, boys drink beer and girls drink vodka mixers), whilst the Bristol groups frequently described the brands themselves as masculine or feminine.

- *And what about [pre-mixed brand] who drinks that?*
- *It's a bit of a girls' drink*
- *If a boy got caught drinking that they would probably get bullied. It's like when you are younger and you want to start drinking because you are cool, the first thing you go to is [pre-mixed brand], it's like the "hard" drink alcohol*

- *But if you took it to a party, oh my gosh! You just can't. A bloke just can't drink it I asked for a [pre-mixed brand] and my dad refused to buy it for me because it was a girl's drink. He said: if you start drinking that you are not living with me! (G6, Bristol)*

Gender splits were often reinforced by product advertising.

- *I think it's because you think of a man going and getting a pint like after a football game, or after a hard day at work. So you just think well that's a beer, that's a man's thing (G5, Stirling)*
- *Like your sparkly pink they would be more female and then you get obviously more directed to the male with like [mainstream lager] for football and stuff*
- *It's [pre-mixed vodka] feminine, and kind of emasculating. (G4, Stirling)*

However, throughout the discussions some brands were found to appeal to both genders such as a popular cider brand.

AGE

Participants tended to associate products with different age groups. They differentiated between older/adult products (e.g. whisky, gin, wine etc., often described as tasting horrible and being presented in bland packaging) in contrast to drinks that appealed to younger people, such as fruity drinks and single-serve pre-mixed cocktails.

- *I think whisky's more of, like, an old man drink. Like, if you know what I mean? Like, ma pal would see ma Grandpa wi', like, a wee glass o' whisky. Like, I never see anyone – or very rarely – people at our age wi' whisky, at all. (G2, Stirling)*
- *I would rather be seen drinking [youth brands] than a can of [mainstream brand].*
- *Why's that?*
- *Just because I think [mainstream lager brand] is quite...Old man-y! (G4, Bristol)*

Many could draw distinctions between drinks that were deemed suitable for younger 'starter' drinkers [pre-mixed vodka brand was seen as garish and unsophisticated] and older teenagers who had been drinking for a few years [a more adult-oriented vodka brand].

- *It's [pre-mixed vodka] probably for younger ones like thirteen and that when they first start drinking, like they will drink things like that... It's pretty much a juice rather than alcohol (G3, Stirling)*

There were numerous references to flavoured ciders as appealing to participants.

- *I'm not one for the taste of alcohol, so [fruit flavoured cider] is quite a big thing because it's quite fruity (G4, Stirling)*

There was a suggestion that female participants seemed less troubled by drinking products that they associated with older women.

- *So a lot of you like [wine brand], so aside from yourself, what kind of people do you think drink it?*
- *My mum drinks it, with all her mates on a Friday night [giggles].*
- *So it doesn't bother you that middle aged women drink it?*
- *We are women, independent women (G3, Bristol)*

SOCIAL BACKGROUND

Social background also had an influence on what/what not to drink. By far the most prominent theme here was the use of specific brands as badge products to describe certain unattractive

sub-groups and drinking styles. Whilst these groups were usually described in very negative, dismissive terms, in some instances they were also responsible for generating animated discussion and hilarity, with participants often keen to share their views and experiences, especially with regards to the [cheap tonic wine brand] in Scotland:

- *It's not, like, high class [cheap tonic wine brand] ... I would kind of imagine someone like, like round the street corner... or like in a park... a druggie (G1, Stirling)*
It's mainly a boy's drink [cheap tonic wine brand] – Neddy boys... ones that sit up at the park bench... walk about in trackies an' stuff (G2, Stirling)

DISCUSSION

This study was prompted by significant concerns about the levels of under-age consumption of alcohol in the UK. The scoping of the literature found evidence that alcohol industry marketing influences overall alcohol consumption trends⁴¹⁻⁴⁵. Examination of how marketing works suggests that the current regulatory focus on media control is being bypassed by fleet-footed marketers who use powerful brands to increase consumption⁴⁵⁻⁴⁸. These marketing forces are not spread evenly across the sector: the sector's own figures suggest that some brands are more appealing to young people than others⁴⁹. Whilst branding know-how is established within the marketing profession, in public health much less is known about the ways in which branding works and how it influences young people. Hence this study aimed to address this gap. Focus group discussions were used to explore teenagers' experiences with alcohol consumption and how this may be linked to their awareness, knowledge and views on specific brands.

FOCUS GROUP DISCUSSIONS

Focus group results found clear indications of brand differentiation, where respondents typically indicated awareness, liking and preference for some alcohol brands but not others. However, it was also the case that brand preferences may be bypassed when teenagers wanted to drink strong alcohol quickly and cheaply. In both Bristol and Scotland specific ready-to-drink whisky, rum and vodka brands were popular, whilst in Bristol sweet cider brands were particularly popular. The Scotland focus groups were noteworthy for mentioning alcoholic energy brands and also (seen as low-status) very cheap ciders and lagers. In contrast, mainstream ales or stouts were regarded as brands for 'old people' and were widely dismissed.

Many teenagers were aware of and expressed a liking for brands that were associated with a sweet taste, brightly coloured liquid, and packaging/bottling that was designed to stand out. Both the sweet taste and packaging design were noted by the researchers as of particular importance in encouraging younger teenagers to both be aware of and to try the products. These 'alcopop'-style drinks employ a marketing mix that combines various components that were recalled and liked by respondents. Brand names (which we cannot reproduce in this report for legal reasons) were used throughout the focus group conversations and were very important throughout the discussions. Brands were used as language short-hands to communicate attributes, either of the products themselves, or, by association, of the people consuming them.

Brand awareness and preferences were, unsurprisingly, seen to be quite different for different genders, ages and socioeconomic groups. Gender differences were sometimes expressed in relation to drink category rather than by specific brands with boys drinking beer and girls drinking vodka mixers, but on other occasions brands themselves were described as masculine or feminine. Age was an important factor influencing brand choice. Participants differentiated between adult products such as whisky and gin, and drinks that appealed to younger people such as fruity drinks and single-serve pre-mixed cocktails. This ability was often impressively nuanced, with contrast drawn between 'starter' drinker brands and those for older teenagers. Social background also had an influence on what/what not to drink with specific brand names used as shorthand to describe sub-groups and drinking styles. Fruit ciders were a popular choice across all ages, genders and social background.

When considering the alcoholic drinks recommended for scrutiny (a cheap tonic wine, a grape wine and an alcoholic energy drink) by the participants, it is perhaps significant that all were not only seen to be potent, high strength products sold at a low price, but were also implicitly seen to be exclusive under-age products. It is noteworthy that whilst participants recommended these three brands as requiring particular attention, none reported regularly consuming these products. Given their apparent sub-group status, an alternative recruitment strategy would be required to better understand their value to and use by young consumers. Although participants didn't recommend vodka for scrutiny, through the discussions vodka emerged as a popular drink to be consumed by young people. It was associated with getting drunk quickly causing short-term health harms.

Given that the effects of alcohol brand marketing on our respondents were clearly and consistently on show throughout the group discussions, it is unsurprising that public health bodies have called for more stringent regulation. However, there has been little research on brand-specific legislation, in other words ways to identify which brands are causing harm and penalise the companies that own these harmful brands. This gap was explored in the second phase of this work.

STRENGTHS AND LIMITATIONS

This study has begun to fill specific gaps in the evidence base on teenage drinking and ways of combating potential harm. While other studies have found that alcohol marketing as a whole appears to be influencing teenagers⁵⁰, and studies in tobacco marketing found brand effects⁵¹, to date there is no research that we are aware of in the UK that has examined the differential effects of alcohol brands on teenagers.

The study was however subject to resource and time constraints, and so we propose further work to bring these findings to population scale and to further develop the logic models. A large scale longitudinal cohort study could gather causal evidence of the link between the marketing of certain brands and subsequent brand-specific consumption of alcohol by young teenagers. This evidence could be used to inform the design of population level 'brand control' interventions - including new regulatory ideas such as Performance Based Regulation - to address alcohol marketing, with these intervention ideas tested with academics and public policy specialists, and the general public.

APPENDICES

APPENDIX 1: UNPROMPTED AND PROMPTED BRAND RECOGNITION IN BRISTOL

1.	Absolut vodka	31.	Frosty Jack's	61.	San Miguel
2.	Archers	32.	Glen's vodka	64.	Smirnoff ice
3.	Babycham	33.	Gordon's Gin	65.	Sourz
4.	Bacardi	34.	Grey Goose Vodka	66.	Southern Comfort
5.	Baileys	35.	Guinness	67.	Speckled Hen
6.	Basic (supermarket)	36.	Hardys	68.	Stella
7.	Becks	37.	Harvester	69.	Stowford Press
8.	Blackthorn	38.	Heineken	70.	Strongbow
9.	Blossom Hill	39.	Highbridge	71.	Tesco Finest
10.	Bombay Sapphire	40.	Hobgoblin	72.	Tesco Value
11.	Brewdog	41.	Hooch	73.	Thatchers
12.	Brothers	42.	Isla Negra	74.	Tiger
13.	Budweiser	43.	Jack Daniel's	75.	TVX
14.	Bulmers	44.	Jacob's Creek	76.	V- Kat
15.	Cactus Jacks	45.	Jägermeister	77.	VK
16.	Captain Morgan	46.	Jameson	78.	White Lightning
17.	Caribbean Twist	47.	Jim Beam	79.	WKD
18.	Carling	48.	John Smith's	80.	Wolf Blass
19.	Carlsberg	49.	Kopparberg		
20.	Ciroc	50.	Kronenberg		
21.	Corky's	51.	Lambrini		
22.	Corona	52.	Magners		
23.	Courvoisier	53.	Malibu		
24.	Crofter's cider	54.	Natch		
25.	Crompton Oaks cider	55.	Pernod		
26.	Desperados	56.	Peroni		
27.	Disaronno	57.	Rattlesnake		
28.	Echo Falls	58.	Red Stripe		
29.	Famous Grouse	59.	Russian Bear		
30.	Foster's	60.	Russian Standard		

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