

Appendix A

TV advertising of food and drink

This is an appendix to the briefing note: <https://www.ifs.org.uk/uploads/BN238.pdf>. The briefing note summarises the findings of a report produced for the Department of Health and Social Care. Full text of the report is below.

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TV advertising of food and drink

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May 10, 2018

1 Introduction

This report describes the timing and nature of the TV advertising for food and drink in the UK.

Data. We use data from AC Nielsen on all adverts for food and drink products broadcast on television during 2015. The data include details of all adverts shown between January and December 2015, including information on what product was advertised, the channel on which the advert was shown and what programmes ran either side of the advert. The data also contain information on viewing figures for the advert, provided by the Broadcasters’ Audience Research Board (BARB).

Impacts. In the main report we describe ‘impacts’, which are a widely-used industry measure of viewing figures. In the appendix we provide equivalent description by number of adverts and in the spreadsheet appendix we also provide information by expenditure. The number of impacts is equal to the number of pairs of eyes who view the advert, e.g. 1 person watching an advert 5 times is equivalent to 5 people watching an advert once, and is provided to the nearest thousand. We focus on child impacts. Children are defined as aged 4-15.

Children’s programming. We define children’s programming using either the channel on which the advert was aired (e.g. all adverts shown on children’s cable TV are classified as children’s programming) or the genre of the programme provided by AC Nielsen. See Appendix E for more details.

Sponsorship. Nielsen also collects data on TV ‘sponsorship’ (e.g. The Big Bang Theory is sponsored by Hungry House) for 20 channels. Impacts are not recorded for sponsorship slots. Sections 2 – 4 describe adverts only (we exclude sponsorship). In Section 5 we list all brands that carry out sponsorship, the number of slots that they run and spending on sponsorship.

Outline. The rest of this document is structured as follows:

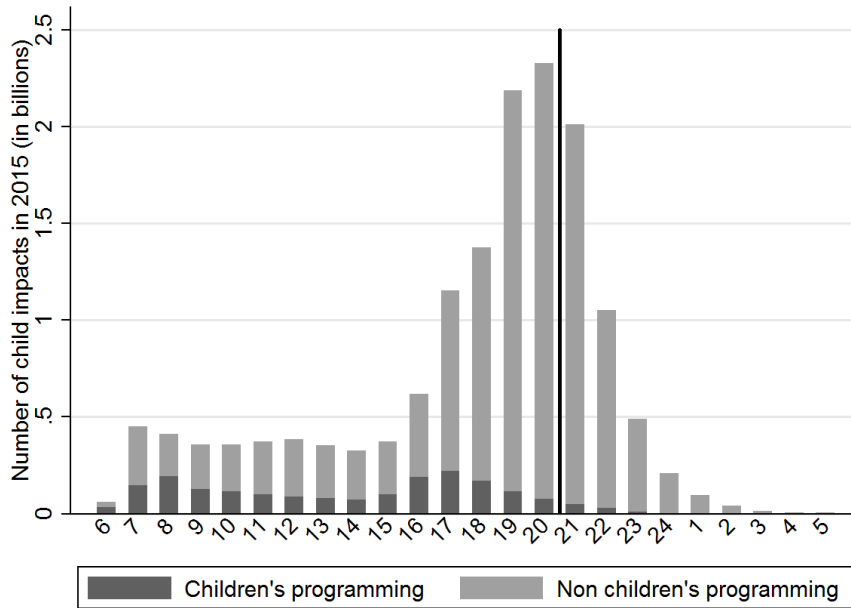
- Section 2 outlines how child impacts for all food and drink varies by hour of the day and during four timeslots: (i) prior to the watershed (all TV between 5.30 - 21.00), (ii) after the watershed (all TV between 21.00 - 5.30), (iii) between 19.00 - 21.00, and (iv) during children’s programming.
- Section 3 describes the breakdown of the number of child impacts by product category and how this varies across time of day.
- Section 4 describes how the number of child impacts varies across the top brands.
- Section 5 describes TV sponsorship.

Appendix. The appendix to this report contains additional information on the data used, and also reproduces the analysis in Sections 2 – 4 in terms of number of adverts. A spreadsheet appendix contains all the data used to produce the tables and figures in the report, as well as details by expenditure.

2 Child impacts by time of day

Figure 2.1 shows the total number of child impacts recorded in each hour of the day (over all food and drink products, excluding sponsorship, summed over the entire year). A breakdown by day of the week is given in Appendix C. The most child impacts occur between 17.00 and 22.00. The figure also shows the breakdown into impacts during children’s and non-children’s programming. Table 2.1 summarises this information. The bulk of children’s impacts occur during non-children’s programming, with 12.8% occurring during children’s programming.

Figure 2.1: *Child impacts by hour of day*



Notes: Each bar shows the total child impacts for each hour of the day across 2015 and for all food and drink products. The dark portion of the bar shows impacts on children’s programming, and the light portion of the bar shows impacts on non-children’s programming. The vertical line denotes the beginning of the watershed. See Appendix E for details of how we have defined children’s programming.

Table 2.1: *Child impacts by time slot*

| (1) Time slot | (2) No. child impacts (in thousands) | (3) % of total child impacts |
|-------------------------|--|------------------------------------|
| Pre watershed | 11,112,168 | 73.93 |
| Between 19.00 and 21.00 | 4,515,354 | 30.04 |
| Post watershed | 3,918,294 | 26.07 |
| Children’s programming | 1,924,194 | 12.80 |

Notes: Column (2) shows the total number of child impacts (in thousands) in 2015 that fall within each time slot, column (3) shows the percentage of all child impacts across 2015 that this constitutes. Pre watershed is defined as between 5.30 and 21.00 and post watershed as after 21.00 and prior to 5.30. See Appendix E for definition of children’s programming.

3 Child impacts by product category

Table 3.1 shows how the number of child impacts varies with product category and product subcategory. 10% of children's impacts are for restaurants & bars, with fast food restaurants making up almost all of the adverts for this category. Adverts for the food apps 'Hungry House' and 'Just Eat' constitute around 1 percent of the total child impacts in 2015. Food brand building (e.g. advertising of entire product ranges) is responsible for almost 12% of children's impacts. Advertising of confectionery, snacks and drinks together contribute 27% of children's impacts. The remaining child impacts are for adverts in other product categories, with dairy, cereal, and frozen food being the largest other product subcategories.

Table 3.1: *Child impacts by product category*

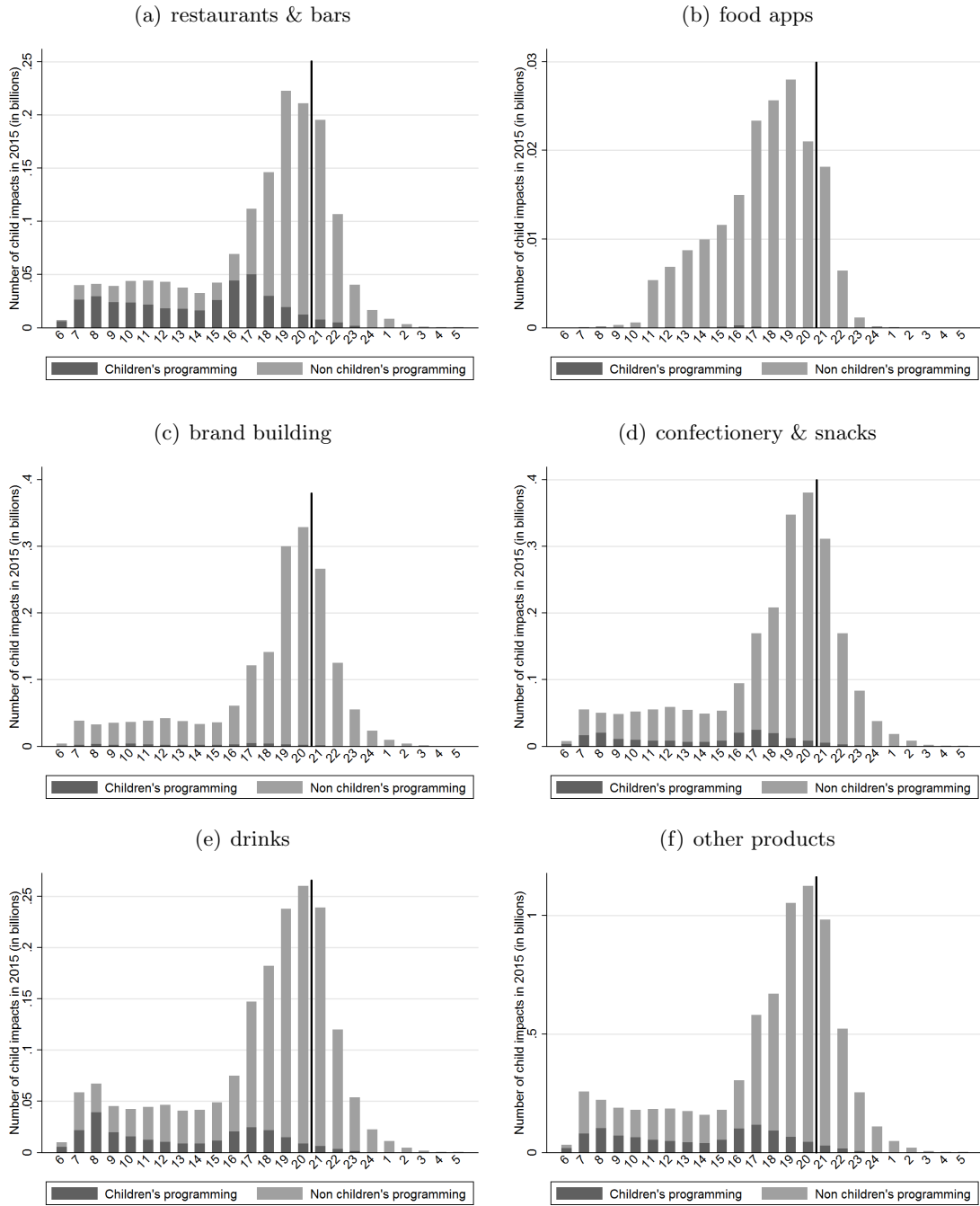
| (1) Product category | (2) % of total child impacts | (3) Product subcategory | (4) % of total child impacts | (5) No. child impacts (in thousands) |
|-----------------------------|------------------------------------|------------------------------|------------------------------------|--|
| Restaurants & Bars | 10.01 | Fast Food Restaurants | 8.99 | 1,351,456 |
| | | Independent Restaurant | 0.86 | 129,592 |
| | | Chain Restaurants | 0.14 | 20,494 |
| | | Pubs & Bars | 0.02 | 3,546 |
| Food Apps | 1.22 | Hungry House | 0.84 | 126,333 |
| | | Just Eat | 0.38 | 56,413 |
| Brand Building | 11.80 | Food Brand Building | 11.62 | 1,746,059 |
| | | Drink - Brand Building | 0.19 | 28,080 |
| Confectionery & Snacks | 15.43 | Chocolate | 6.51 | 978,710 |
| | | Crisps | 3.43 | 514,847 |
| | | Sweets | 2.84 | 427,006 |
| | | Other Confectionery & Snacks | 2.65 | 398,684 |
| Drinks | 11.99 | Hot Beverages | 3.76 | 564,930 |
| | | Sports/energy/health Drinks | 2.53 | 380,916 |
| | | Soft Drinks | 2.41 | 361,798 |
| | | Fruit Juice & Smoothies | 1.00 | 150,273 |
| | | Water | 0.88 | 131,941 |
| | | Squash | 0.74 | 111,500 |
| | | Milk Drinks | 0.36 | 54,210 |
| | | Drink - Multi Product | 0.18 | 26,326 |
| | | Childrens Drinks | 0.13 | 19,821 |
| | | Iced Tea/iced Coffee | 0.00 | 38 |
| | | Other | 49.55 | Dairy |
| Cereal | 7.10 | | | 1,067,307 |
| Frozen Food | 6.72 | | | 1,009,400 |
| Other Food Cupboard | 5.71 | | | 857,647 |
| Alcohol | 4.84 | | | 728,139 |
| Bakery | 2.43 | | | 365,404 |
| Cooking Sauces | 2.18 | | | 327,274 |
| Meat/poultry | 1.96 | | | 293,868 |
| Baby & Toddler Food | 1.94 | | | 292,050 |
| Delicatessen / Chilled Food | 1.05 | | | 157,088 |
| Salad/vegetables | 0.77 | | | 115,077 |
| Ready / Prepared Meals | 0.72 | | | 108,448 |
| Fish | 0.45 | | | 67,638 |
| Free From | 0.21 | | | 32,221 |
| Fruit | 0.18 | | | 26,606 |

Notes: Column (2) shows the % of all child impacts in 2015 for each product category, listed in column (1). Column (4) shows the % of all child impacts in 2015 for each product subcategory, listed in column (3). Column (5) shows the number of child impacts (in thousands) for adverts on products in each each product subcategory, listed in column (3). See Appendix D for explanation of product category and product subcategory variables.

3.1 Child impacts by product category throughout the day

Figure 3.1 shows the total number of child impacts by product category and hour of the day (summed over the entire year). Each subfigure shows a breakdown of the total number of child impacts for one of the product categories into those that occur during children's television and those that occur during non children's television. Note that the vertical scale of the subfigures varies by category.

Figure 3.1: *Child impacts by product category and time of day*



Notes: Each bar shows the total child impacts for each hour of the day across 2015 for restaurant & bars. The dark portion of the bar shows impacts on children's programming, and the light portion of the bar shows impacts on non-children's programming. The vertical line denotes the beginning of the watershed. See Appendix E for details of how we have defined children's programming. See Appendix D for details of how we have categorised products into product categories.

Table 3.2 shows the number of child impacts and percentage of total child impacts for each product category by broad time slot.

The majority of child impacts for all product categories falls between 17.00 and 22.00. There is almost no advertising for food apps before 11.00. Food apps and brand building are not advertised during children’s programming at any time of the day. For the other product categories, at least some advertising is shown during children’s programming. For example, 25% of child impacts for restaurants & bars are shown during children’s programming

Table 3.2: *Child impacts by product category and timeslot*

| (1) Time slot | (2) Product Category | (3) No. child impacts (in thousands) | (4) % of total product category impacts |
|-------------------------|-------------------------|--|---|
| Pre Watershed | Restaurants & Bars | 1,132,570 | 75.25 |
| | Food Apps | 156,661 | 85.73 |
| | Brand Building | 1,287,388 | 72.56 |
| | Confectionery & Snacks | 1,686,933 | 72.74 |
| | Drinks | 1,348,113 | 74.82 |
| | Other | 5,500,746 | 73.86 |
| Between 19.00 and 21.00 | Restaurants & Bars | 433,796 | 28.82 |
| | Food Apps | 48,961 | 26.79 |
| | Brand Building | 628,753 | 35.44 |
| | Confectionery & Snacks | 727,816 | 31.38 |
| | Drinks | 497,805 | 27.63 |
| | Other | 2,178,222 | 29.25 |
| Post Watershed | Restaurants & Bars | 372,518 | 24.75 |
| | Food Apps | 26,085 | 14.27 |
| | Brand Building | 486,751 | 27.44 |
| | Confectionery & Snacks | 632,315 | 27.26 |
| | Drinks | 453,640 | 25.18 |
| | Other | 1,946,743 | 26.14 |
| Children’s Programming | Restaurants & Bars | 379,976 | 25.25 |
| | Food Apps | 783 | 0.43 |
| | Brand Building | 44,909 | 2.53 |
| | Confectionery & Snacks | 195,899 | 8.45 |
| | Drinks | 255,703 | 14.19 |
| | Other | 1,046,924 | 14.06 |

Notes: Column (3) shows the number of child impacts (in thousands) that occur during the timeslot listed in column (1) for each product category, listed in column (2). Column (4) shows the share of total child impacts for each product category (listed in column (2)) during each time slot.

4 Child impacts by brand

Table 4.1 shows the number of child impacts for each of the top 20 brands (brands are ranked in order of the number of child impacts). Brand is defined using the Nielsen ‘brand’ variable. The top 20 brands account for 22% of all children’s impacts in 2015.

The brand with the highest number of child impacts is McDonald’s, which accounts for 5.8% of all child impacts. Kelloggs Coco Pops Mini Crocs is second, accounting for 1.7%. KFC is the third highest, account for 1.5%. The supermarkets Aldi, Asda and Iceland all have over 100,000 child impacts in 2015 for their product ranges alone.

Table 4.1: *Child impacts by brand*

| (1) Brand | (2) No. child impacts (in thousands) | (3) % of total child impacts | (4) Rank |
|--|--|------------------------------------|-------------|
| McDonalds - Restaurant Chain | 878,091 | 5.80 | 1 |
| Kelloggs - Coco Pops Mini Crocs | 258,996 | 1.71 | 2 |
| KFC Kentucky Fried Chicken - Restaurant | 234,333 | 1.55 | 3 |
| Aldi - Food & Drink Range | 153,020 | 1.01 | 4 |
| Asda - Prod Range | 147,418 | 0.97 | 5 |
| Wrigley - Extra Peppermint Sugarfree | 132,744 | 0.88 | 6 |
| Subway - Restaurant Chain | 128,937 | 0.85 | 7 |
| Hungry House - Website | 126,333 | 0.83 | 8 |
| PG Tips - Tea Range | 123,668 | 0.82 | 9 |
| Danone - Activia Fibre Yogurt Range | 116,782 | 0.77 | 10 |
| Aldi - Prod Range | 113,120 | 0.75 | 11 |
| Iceland - Frozen Food Range | 111,385 | 0.74 | 12 |
| Galaxy - Chocolate | 111,050 | 0.73 | 13 |
| Weetabix - Cereal | 110,316 | 0.73 | 14 |
| Kerry Foods - Yollies | 104,671 | 0.69 | 15 |
| Danone - Actimel For Kids | 102,909 | 0.68 | 16 |
| Cravendale - Milk | 94,291 | 0.62 | 17 |
| Kelloggs - Coco Pops Super Smooth Porridge | 93,288 | 0.62 | 18 |
| Asda - Food Range | 93,170 | 0.62 | 19 |
| Snickers - Bar | 92,332 | 0.61 | 20 |
| Other | 11,815,575 | 78.03 | |
| <i>Of which:</i> | | | |
| Just Eat - Food Delivery | 56,413 | 0.37 | 54 |

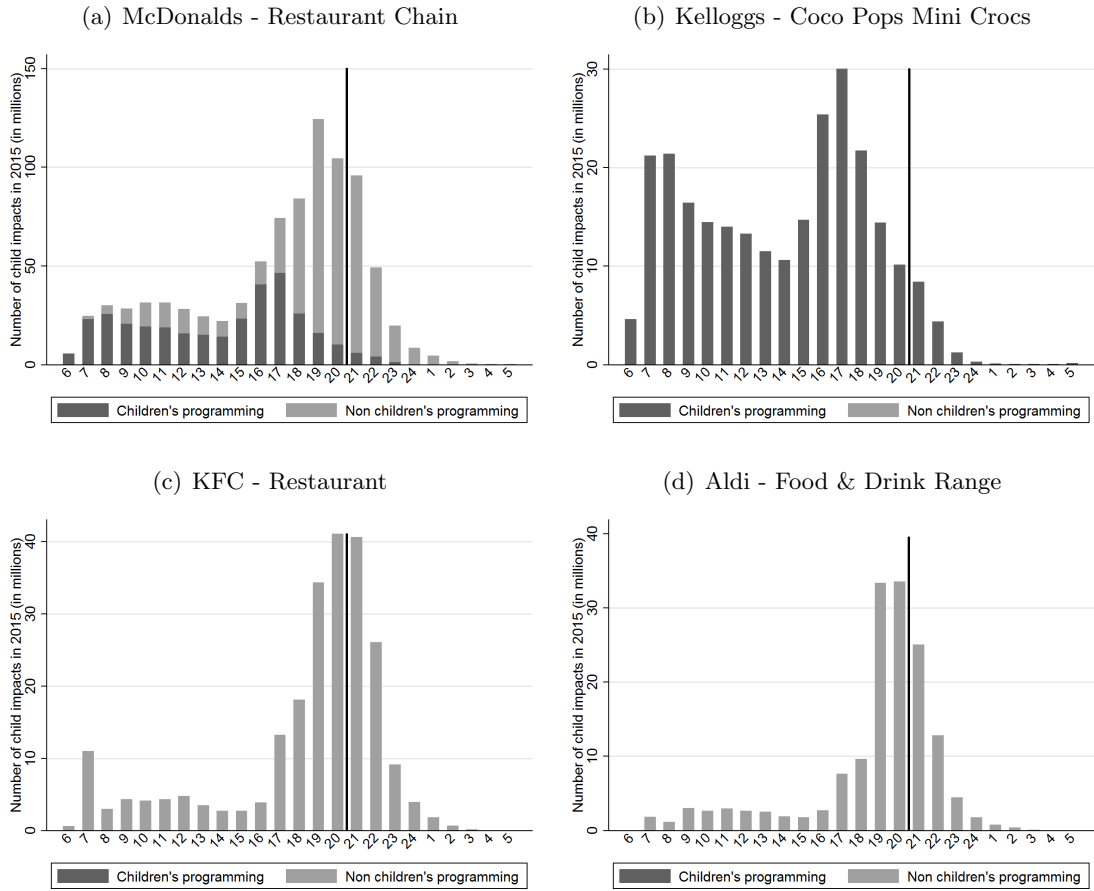
Notes: Column (2) shows the total number of child impacts (in thousands) in 2015 for adverts for each brand, listed in column (1). Column (3) shows the percentage of all child impacts in 2015 for each brand. Column (4) shows the ranking of brands by number of total child impacts.

4.1 Child impacts by brand throughout the day

Figure 4.1 shows the total number of child impacts for adverts for each of the top four brands (ranked based on number of child impacts) in each hour of the day in 2015. The figures also break the impacts down by those that occur during children’s programming and those that occur during non children’s television.

37% of child impacts for adverts for McDonald’s are shown during children’s programming. No children’s impacts for adverts for KFC or Aldi (food & drink range) are shown during children’s programming. However, all the impacts for the adverts for Kellogg’s Coco Pops Mini Crocs are shown during children’s programming.

Figure 4.1: *Child impacts by brand and time of day*



Notes: Each bar shows the total child impacts for each hour of the day across 2015 for each of the top brands. The dark portion of the bar shows impacts on children's programming, and the light portion of the bar shows impacts on non-children's programming. The vertical line denotes the beginning of the watershed. See Appendix E for details of how we have defined children's programming.

Table 4.2: *Child impacts of top brands by time slot*

| (1) | (2) | (3) | (4) |
|-------------------------|---|-------------------------------------|-----------------------------------|
| Time slot | Brand | No. child impacts (in thousands) | % of total brand child impacts |
| Pre watershed | McDonalds - Restaurant Chain | 697,520 | 79.44 |
| | KFC Kentucky Fried Chicken - Restaurant | 151,794 | 64.78 |
| | Kelloggs - Coco Pops Mini Crocs | 244,312 | 94.33 |
| | Aldi - Food & Drink Rge | 107,572 | 70.30 |
| Between 19.00 and 21.00 | McDonalds - Restaurant Chain | 228,891 | 26.07 |
| | KFC Kentucky Fried Chicken - Restaurant | 75,402 | 32.18 |
| | Aldi - Food & Drink Rge | 66,935 | 43.74 |
| | Kelloggs - Coco Pops Mini Crocs | 24,614 | 9.50 |
| Post watershed | McDonalds - Restaurant Chain | 180,572 | 20.56 |
| | KFC Kentucky Fried Chicken - Restaurant | 82,539 | 35.22 |
| | Aldi - Food & Drink Rge | 45,448 | 29.70 |
| | Kelloggs - Coco Pops Mini Crocs | 14,684 | 5.67 |
| Children's programming | McDonalds - Restaurant Chain | 332,453 | 37.86 |
| | KFC Kentucky Fried Chicken - Restaurant | 0 | 0.00 |
| | Aldi - Food & Drink Rge | 0 | 0.00 |
| | Kelloggs - Coco Pops Mini Crocs | 258,996 | 100.00 |

Notes: Column (3) shows the number of child impacts (in thousands) that occur during the timeslot listed in column (1) for each of the top brands, listed in column (2). Column (4) shows the share of total child impacts for brand (listed in column (2)) during each time slot.

5 Sponsorship

Nielsen collects information on TV sponsorship for 20 channels. Impact data is not collected for sponsorship. Table 5.1 lists all the brands that run sponsorship slots, the TV programme that they sponsor, the number of sponsorship slots and total spending on sponsorship. McCain, Yakult and Kelloggs ran the most sponsorship slots during 2015.

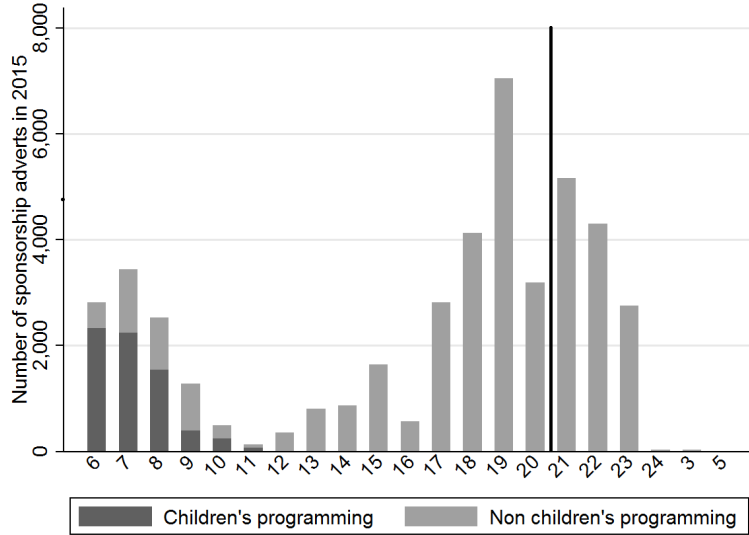
Table 5.1: *Sponsorship*

| (1) Brand | (2) Sponsored TV programme | (3) No. slots | (4) Expenditure (000's £) |
|---------------------------|-----------------------------------|------------------|------------------------------|
| Mccain | Emmerdale | 6,326 | 7,145 |
| Aunt Bessies | Chase | 2,942 | 2,222 |
| | Im A Celebrity | 1,391 | 2,043 |
| | <i>Total</i> | <i>4,333</i> | <i>4,265</i> |
| Yakult | Breakfast Time On C4 | 3,477 | 153 |
| Kelloggs | Breakfast On Citv | 3,342 | 28 |
| Maoam | Big Bang Theory | 3,006 | 1,046 |
| Danone Actimel | Adventure Mornings On Nickelodeon | 1,495 | 56 |
| | Mornings On Pop | 884 | 56 |
| | <i>Total</i> | <i>2,379</i> | <i>112</i> |
| Rowntrees | 9pm Film | 2,274 | 732 |
| Dominos Pizza | Hollyoaks | 2,000 | 1,040 |
| Kelloggs All Bran | Deal Or No Deal | 1,348 | 94 |
| | Fifteen To One | 613 | 64 |
| | <i>Total</i> | <i>1,961</i> | <i>158</i> |
| Lucozade Energy | Big Brother | 1,186 | 175 |
| | Celebrity Big Brother | 551 | 125 |
| | <i>Total</i> | <i>1,737</i> | <i>300</i> |
| Tetley | Movie Time Together | 1,707 | 229 |
| Walls Magnum Mini | 9pm Film | 1,242 | 398 |
| Sainsburys | Itv Showcase Drama | 971 | 1,153 |
| Frenchs Hot Dogs | Discovery | 917 | 92 |
| Maxinutrition | Boxing On Sky Sports | 767 | 89 |
| | Boxing On Channel 5 | 33 | 3 |
| | <i>Total</i> | <i>800</i> | <i>92</i> |
| Fosters | Original Comedy On 4 | 642 | 321 |
| Colmans | Neighbours | 607 | 99 |
| Carling | Characters On Dave | 588 | 176 |
| Jucee | Nickelodeon | 587 | 7 |
| Rice Krispies | Breakfast On Citv | 576 | 7 |
| Fosters Helluva Tour | Comedy On 4 | 557 | 298 |
| New Covent Gdn Soup | Itv Lon Weekd | 547 | 253 |
| Cheerios | Cube | 364 | 233 |
| | Saturday Night Story | 75 | 80 |
| | <i>Total</i> | <i>439</i> | <i>313</i> |
| St Helier | Hells Kitchen On Itv2 | 248 | 196 |
| | Mobo Awards | 51 | 16 |
| | <i>Total</i> | <i>299</i> | <i>211</i> |
| Casillero Del Diablo Wine | Legendary Films On Sky 1 | 290 | 94 |
| Pick Up | Comedy On Sky 1 | 286 | 106 |
| Grants Signature | European Qualifiers On Sky Sports | 255 | 84 |
| Napolina | Ginos Italian Escape | 250 | 275 |
| Kelloggs Squares | Celebrity Juice | 196 | 218 |
| Bernard Matthews | Simpsons On 4 | 193 | 62 |
| Magners | Bbq Champ | 192 | 104 |
| Fishermans Friend | Science | | |
| | Engineering | 164 | 22 |
| Ginsters | Football League Tonight | 93 | 15 |
| | Capital One Cup Tonight | 21 | 2 |
| | <i>Total</i> | <i>114</i> | <i>18</i> |
| Crabbies | Tfi Friday | 102 | 42 |
| Glens Of Antrim | Lesser Spotted Ul | 98 | 25 |
| Kelloggs Krave | 10000 Bc | 64 | 11 |
| Cadbury | Christmas On Itv | 64 | 52 |
| Smint | Stv | 49 | 20 |
| Irwins Bakery | Rare Breed | 45 | 25 |
| | Paul | | |
| | Nicks Big Fo | 2 | 1 |
| | <i>Total</i> | <i>47</i> | <i>26</i> |
| Mornflake | Food With A View | 38 | 4 |
| Buchanans Confectionery | Nicks Big American Food Trip | 28 | 17 |
| | Paul | | |
| | Nicks Big American Food Trip | 28 | 10 |
| Buchanans Conf | Moviejuice | 26 | 17 |
| Diet Coke | Pulse | 26 | 3 |
| Spar | Utv At The Show | 24 | 2 |
| Walkers | Uefa Champions League | 15 | 2 |
| Pepsi Max | Uefa Super Cup | 15 | 2 |
| Iceland | Im A Celebrity | 1 | 0 |
| Uncle Bens | Transform Whats On She | 1 | 0 |
| Heineken/gazprom | Champions League | 90 | 52 |
| Heineken/walkers | Uefa Champions League | 24 | 5 |
| Heineken/ps4 | Champions League | 58 | 25 |
| Heineken/mastercard | Champions Lge | 34 | 37 |
| Heineken | Champions League | 347 | 219 |
| | <i>Total</i> | <i>553</i> | <i>358</i> |

Notes: Column (1) lists brands, and column (2) lists the TV that they sponsor (either programme, channel, or timeslot). Column (3) lists the total number of sponsorship slots for each brand and column (4) lists the total spending on sponsorship for each brand in 2015. All Heineken sponsorship is listed separately at the bottom of the table as it splits the majority of its advertising with other products (including Walkers who also run their own sponsorship)

Figure 5.1 shows the number of sponsorship slots that occur during each hour of the day in 2015, and breakdown into children’s and non children’s programming. Table 5.2 summarises this information. 15% of sponsorship impacts occur during children’s programming; these are predominantly shown before 11am.

Figure 5.1: *Sponsorship slots by hour of day*



Notes: Each bar shows the total number of sponsorship slots during each hour of the day across 2015. The dark portion of the bar shows impacts during children’s programming, and the light portion of the bar shows impacts during non-children’s programming. The vertical line denotes the beginning of the watershed. See Appendix E for details of how we have defined children’s programming.

Table 5.2: *Sponsorship slots by time slot*

| (1) Time slot | (2) Number of sponsorship slots | (3) % of total sponsorship slots |
|-------------------------|---------------------------------------|--|
| Pre watershed | 32,150 | 72.36 |
| Between 19.00 and 21.00 | 10,240 | 23.05 |
| Post watershed | 12,283 | 27.64 |
| Children’s programming | 6,835 | 15.38 |

Notes: Notes: Column (1) shows the total number of sponsorship slots in 2015 that occur in each time slot, column (2) shows the percentage of the number of sponsorship slots across 2015 in each time slot. Pre watershed is defined as between 5.30 and 21.00 and post watershed as after 21.00 and prior to 5.30. See Appendix E for definition of children’s programming.

Table 5.3 lists the top ten brands (ranked by number of sponsorship slots), and how their slots are distributed across the four time periods. Most sponsorship occurs pre watershed; for example, 99.8% of McCains’ sponsorship slots are run in the pre-watershed period. Only two of the top ten brands run sponsorship slots during children’s programming; these are Kelloggs and Danone Actimel.

Table 5.3: *Sponsorship slots by top sponsorship brands and time slot*

| (1) | (2) | (3) | (4) |
|-------------------------|-------------------|-----------------------------|------------------------------------|
| Time slot | Brand | Number of sponsorship slots | % of total brand sponsorship slots |
| Pre watershed | Mccain | 6,315 | 99.83 |
| | Aunt Bessies | 3,189 | 73.60 |
| | Yakult | 3,477 | 100.00 |
| | Kelloggs | 3,342 | 100.00 |
| | Maoam | 2,137 | 71.09 |
| | Dominos Pizza | 2,000 | 100.00 |
| | Kelloggs All Bran | 1,954 | 99.64 |
| | Danone Actimel | 2,379 | 100.00 |
| | Lucozade Energy | 412 | 23.72 |
| | Rowntrees | 7 | 0.31 |
| Between 19.00 and 21.00 | Mccain | 5,624 | 88.90 |
| | Aunt Bessies | 349 | 8.05 |
| | Yakult | 0 | 0.00 |
| | Kelloggs | 0 | 0.00 |
| | Maoam | 1,022 | 34.00 |
| | Dominos Pizza | 764 | 38.20 |
| | Kelloggs All Bran | 78 | 3.98 |
| | Danone Actimel | 0 | 0.00 |
| | Lucozade Energy | 22 | 1.27 |
| | Rowntrees | 6 | 0.26 |
| Post watershed | Mccain | 11 | 0.17 |
| | Aunt Bessies | 1,144 | 26.40 |
| | Yakult | 0 | 0.00 |
| | Kelloggs | 0 | 0.00 |
| | Dominos Pizza | 0 | 0.00 |
| | Maoam | 869 | 28.91 |
| | Kelloggs All Bran | 7 | 0.36 |
| | Danone Actimel | 0 | 0.00 |
| | Lucozade Energy | 1,325 | 76.28 |
| | Rowntrees | 2,267 | 99.69 |
| Children's programming | Mccain | 2 | 0.03 |
| | Aunt Bessies | 0 | 0.00 |
| | Yakult | 0 | 0.00 |
| | Kelloggs | 3,304 | 98.86 |
| | Dominos Pizza | 1 | 0.05 |
| | Maoam | 0 | 0.00 |
| | Danone Actimel | 2,379 | 100.00 |
| | Kelloggs All Bran | 4 | 0.20 |
| | Lucozade Energy | 0 | 0.00 |
| | Rowntrees | 1 | 0.04 |

Notes: Column (3) shows the number of child impacts that occur during the timeslot listed in column (1) for each of the top ten brands, listed in column (2). Column (4) shows the share of total child impacts for brand (listed in column (2)) during each time slot.

APPENDIX

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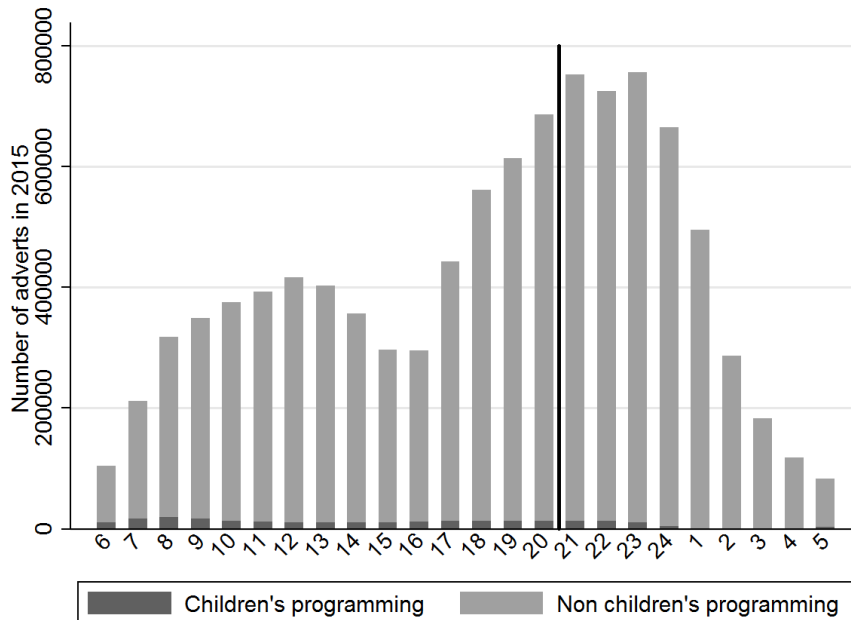
A Adverts

Our analysis in the main body of this report is in terms of child impacts. Section A of this appendix reproduces the tables and graphs presented in Sections 2-4 of the document in terms of number of adverts rather than child impacts.

A.1 Adverts by time

Figure A.1 shows the total number of adverts in the 2015 data which occur in each hour of the day, and the share of this which occurs during children's and non-children's programming. Table A.1 shows the total number of adverts that occur during key timeslots: prior to the watershed, after the watershed, between 19.00 and 21.00, and during children's programming.

Figure A.1: *Adverts by hour of day*



Notes: Each bar shows the total number of adverts in each hour of the day across 2015 for all food and drink products. The dark portion of the bar shows adverts during children's programming, and the light portion of the bar shows adverts during non-children's programming. The vertical line denotes the beginning of the watershed. See Appendix E for details of how we have defined children's programming.

Table A.1: *Advertising by time slot*

| Time slot | (1) No. Adverts | (2) % of total adverts |
|-------------------------|--------------------|---------------------------|
| Pre watershed | 5,854,160 | 59.20 |
| Between 19.00 and 21.00 | 1,300,362 | 13.15 |
| Post watershed | 4,033,837 | 40.80 |
| Children's programming | 243,036 | 2.46 |

Notes: Column (1) shows the total number of adverts in 2015 that fall within each time slot, column (2) shows the percentage of adverts across 2015 in each time slot. Pre watershed is defined as between 5.30 and 21.00 and post watershed as after 21.00 and prior to 5.30. See Appendix E for definition of children's programming.

A.2 Adverts by product category

Table A.2 shows how the number of adverts varies with product category and product subcategory.

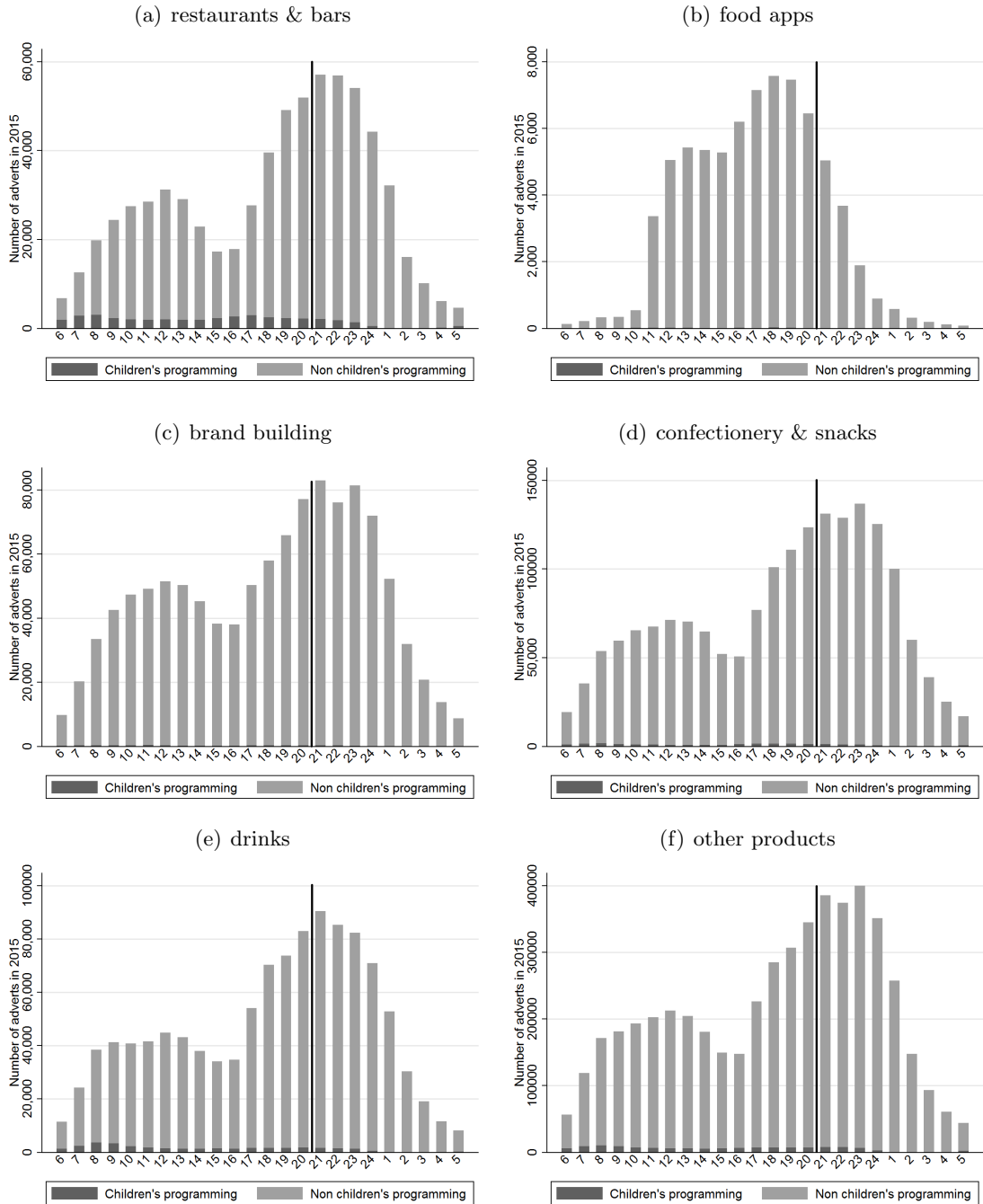
Table A.2: *Advertising by product category*

| (1) Product category | (2) % of total adverts | (3) Product subcategory | (4) % of total adverts | (5) Adverts |
|-----------------------------|---------------------------|------------------------------|---------------------------|----------------|
| Restaurants & Bars | 6.96 | Fast Food Restaurants | 6.11 | 604,451 |
| | | Independent Restaurant | 0.79 | 78,388 |
| | | Chain Restaurants | 0.04 | 3,998 |
| | | Pubs & Bars | 0.01 | 886 |
| Food Apps | 0.75 | Hungry House | 0.49 | 48,551 |
| | | Just Eat | 0.25 | 25,131 |
| Brand Building | 11.30 | Food Brand Building | 11.17 | 1,104,870 |
| | | Drink - Brand Building | 0.13 | 12,949 |
| Confectionery & Snacks | 18.07 | Chocolate | 8.74 | 864,119 |
| | | Crisps | 3.76 | 371,606 |
| | | Other Confectionery & Snacks | 3.26 | 322,390 |
| | | Sweets | 2.31 | 228,361 |
| Drinks | 11.38 | Hot Beverages | 3.87 | 382,941 |
| | | Soft Drinks | 2.67 | 264,092 |
| | | Sports/energy/health Drinks | 1.79 | 176,760 |
| | | Fruit Juice & Smoothies | 1.09 | 107,675 |
| | | Water | 0.72 | 71,181 |
| | | Squash | 0.68 | 67,536 |
| | | Milk Drinks | 0.24 | 23,950 |
| | | Drink - Multi Product | 0.21 | 20,962 |
| | | Childrens Drinks | 0.10 | 10,074 |
| | | Iced Tea/iced Coffee | 0.00 | 37 |
| | | Other | 51.55 | Dairy |
| Other Food Cupboard | 7.22 | | | 713,621 |
| Frozen Food | 6.84 | | | 676,424 |
| Alcohol | 6.12 | | | 605,312 |
| Cereal | 4.33 | | | 427,712 |
| Cooking Sauces | 3.02 | | | 298,197 |
| Meat/poultry | 2.68 | | | 264,507 |
| Bakery | 2.56 | | | 253,227 |
| Baby & Toddler Food | 1.48 | | | 146,521 |
| Delicatessen / Chilled Food | 1.33 | | | 131,854 |
| Ready / Prepared Meals | 1.03 | | | 101,747 |
| Salad/vegetables | 0.81 | | | 80,130 |
| Fish | 0.53 | | | 52,054 |
| Fruit | 0.28 | | | 27,416 |
| Free From | 0.18 | 17,981 | | |

Notes: Column (2) shows the % of all adverts shown in 2015 for each product category, listed in column (1). Column (4) shows the % of adverts in 2015 for each product subcategory, listed in column (3). Column (5) shows the number of adverts on products in each each product subcategory, listed in column (3). See Appendix for explanation of product category and product subcategory variables.

A.2.1 Adverts by product category throughout the day

Figure A.2: *Adverts by product category and time of day*



Notes: Each bar shows the total adverts during each hour of the day across 2015 for other products. The dark portion of the bar shows adverts during children's programming, and the light portion of the bar shows adverts during non-children's programming. The vertical line denotes the beginning of the watershed. See Appendix E for details of how we have defined children's programming. See Appendix D for details of how we have categorised products into product categories.

Table A.3: *Adverts by product category in each time slot*

| (1) | (2) | (3) | (4) |
|-------------------------|------------------------|-------------|-----------------------------|
| Time slot | Product Category | No. adverts | % of total timeslot adverts |
| Pre Watershed | Restaurants & Bars | 408,562 | 59.41 |
| | Food Apps | 60,914 | 82.67 |
| | Brand Building | 681,569 | 60.97 |
| | Confectionery & Snacks | 1,030,991 | 57.71 |
| | Drinks | 677,971 | 60.25 |
| | Other | 3,003,339 | 58.92 |
| Between 19.00 and 21.00 | Restaurants & Bars | 101,056 | 14.69 |
| | Food Apps | 13,903 | 18.87 |
| | Brand Building | 142,972 | 12.79 |
| | Confectionery & Snacks | 234,282 | 13.11 |
| | Drinks | 156,735 | 13.93 |
| | Other | 651,414 | 12.78 |
| Post Watershed | Restaurants & Bars | 279,161 | 40.59 |
| | Food Apps | 12,768 | 17.33 |
| | Brand Building | 436,250 | 39.03 |
| | Confectionery & Snacks | 755,485 | 42.29 |
| | Drinks | 447,237 | 39.75 |
| | Other | 2,093,750 | 41.08 |
| Children's Programming | Restaurants & Bars | 41,710 | 6.06 |
| | Food Apps | 178 | 0.24 |
| | Brand Building | 5,738 | 0.51 |
| | Confectionery & Snacks | 23,629 | 1.32 |
| | Drinks | 34,317 | 3.05 |
| | Other | 137,464 | 2.70 |

Notes: Column (2) shows the % of all adverts in 2015 for each product category, listed in column (1). Column (4) shows the % of all adverts in 2015 for each product subcategory, listed in column (3). Column (5) shows the number of adverts for products in each each product subcategory, listed in column (3). See Appendix for explanation of product category and product subcategory variables.

A.3 Adverts by top brands

Table A.4 shows the number of adverts for each of the top 20 brands (brands are ranked in order of the number of adverts). Brand is defined using the Nielsen ‘brand’ variable.

Table A.4: *Adverts by top brands*

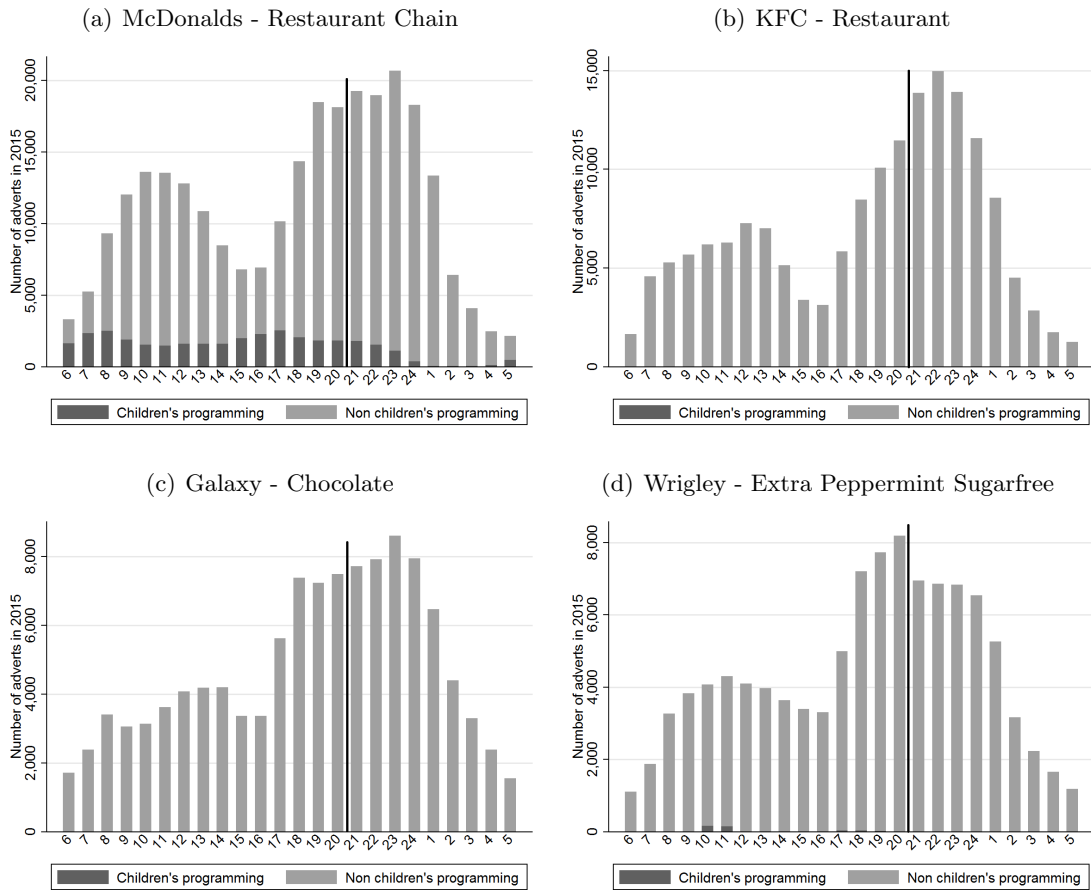
| (1) Brand | (2) No. Adverts | (3) % of total adverts | (4) Rank |
|---|--------------------|---------------------------|-------------|
| McDonalds - Restaurant Chain | 269,793 | 2.73 | 1 |
| KFC Kentucky Fried Chicken - Restaurant | 164,706 | 1.67 | 2 |
| Galaxy - Chocolate | 114,526 | 1.16 | 3 |
| Wrigley - Extra Peppermint Sugarfree | 105,650 | 1.07 | 4 |
| PG Tips - Tea Range | 105,559 | 1.07 | 5 |
| Snickers - Bar | 102,500 | 1.04 | 6 |
| Asda - Product Range | 100,301 | 1.01 | 7 |
| Burger King - Restaurant Chain | 93,537 | 0.95 | 8 |
| Aldi - Food & Drink Range | 80,220 | 0.81 | 9 |
| Subway - Restaurant Chain | 74,018 | 0.75 | 10 |
| Wrigley - Airwaves Menthol & Eucaly | 72,689 | 0.74 | 11 |
| M&m - Confectionery | 72,297 | 0.73 | 12 |
| Aldi - Prod Range | 71,955 | 0.73 | 13 |
| Twix - Bar | 70,128 | 0.71 | 14 |
| Tesco - Prod Range | 65,179 | 0.66 | 15 |
| Dolmio - Bolognese Sauce | 63,369 | 0.64 | 16 |
| Asda - Food Range | 58,431 | 0.59 | 17 |
| Bertolli - Butter | 57,980 | 0.59 | 18 |
| Coop - Food Range | 56,722 | 0.57 | 19 |
| Danone - Activia Fibre Yogurt Range | 56,498 | 0.57 | 20 |
| Other | 8,031,939 | 81.23 | |
| <i>Of which:</i> | | | |
| Hungry House - Website | 48,551 | 0.49 | 31 |
| Just Eat - Food Delivery | 25,131 | 0.25 | 88 |

Notes: Column (2) shows the total number of adverts in 2015 for each brand, listed in column (1). Column (3) shows the percentage of all adverts in 2015 for each brand. Column (4) shows the ranking of brands by number of total child impacts.

A.3.1 Adverts by top brands throughout the day

Figure A.3 shows the total number of adverts for each of the top four brands (ranked based on number of child impacts) in each hour of the day in 2015. The figures also break the adverts down by those that occur during children’s programming and those that occur during non children’s television. Table 4.2 summarises this information.

Figure A.3: *Adverts by brand and time of day*



Notes: Each bar shows the total adverts during each hour of the day across 2015 for each of the top brands. The dark portion of the bar shows adverts during children’s programming, and the light portion of the bar shows adverts during non-children’s programming. The vertical line denotes the beginning of the watershed. See Appendix E for details of how we have defined children’s programming.

Table A.5: *Adverts for top brands by timeslot*

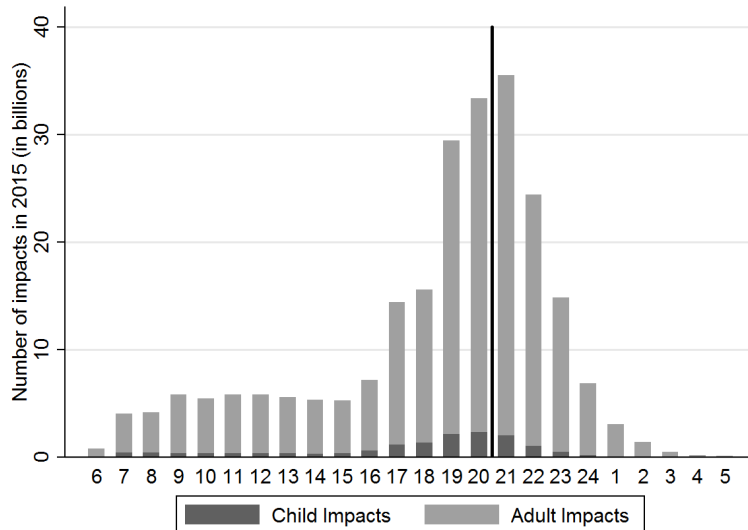
| Time slot | Brand | Number of Adverts | % of total timeslot adverts |
|-------------------------|---|-------------------|-----------------------------|
| Pre watershed | McDonalds - Restaurant Chain | 165,157 | 61.22 |
| | KFC Kentucky Fried Chicken - Restaurant | 92,044 | 55.88 |
| | Galaxy - Chocolate | 64,931 | 56.70 |
| | Wrigley - Extra Peppermint Sugarfree | 65,554 | 62.05 |
| Between 19.00 and 21.00 | McDonalds - Restaurant Chain | 36,632 | 13.58 |
| | KFC Kentucky Fried Chicken - Restaurant | 21,542 | 13.08 |
| | Galaxy - Chocolate | 14,724 | 12.86 |
| | Wrigley - Extra Peppermint Sugarfree | 15,922 | 15.07 |
| Post watershed | McDonalds - Restaurant Chain | 104,636 | 38.78 |
| | KFC Kentucky Fried Chicken - Restaurant | 72,662 | 44.12 |
| | Galaxy - Chocolate | 49,595 | 43.30 |
| | Wrigley - Extra Peppermint Sugarfree | 40,096 | 37.95 |
| Children's programming | McDonalds - Restaurant Chain | 34,265 | 12.70 |
| | KFC Kentucky Fried Chicken - Restaurant | 43 | 0.03 |
| | Galaxy - Chocolate | 20 | 0.02 |
| | Wrigley - Extra Peppermint Sugarfree | 460 | 0.44 |

Notes: Column (3) shows the number of adverts that occur during the timeslot listed in column (1) for each of the top four brands, listed in column (2). Column (4) shows the % of adverts in each time slot that are for the brands listed in column (2).

B Adult and child impacts

In this report we have focused primarily on child impacts. We also have data on impacts for adults aged 16-64. Figure B.1 shows the total number of impacts in 2015 by the hour of the day in which they occurred, and the breakdown between child and adult impacts. Total impacts refers the sum of children (4-15) and adult (16-64) impacts.

Figure B.1: *Total Impacts*

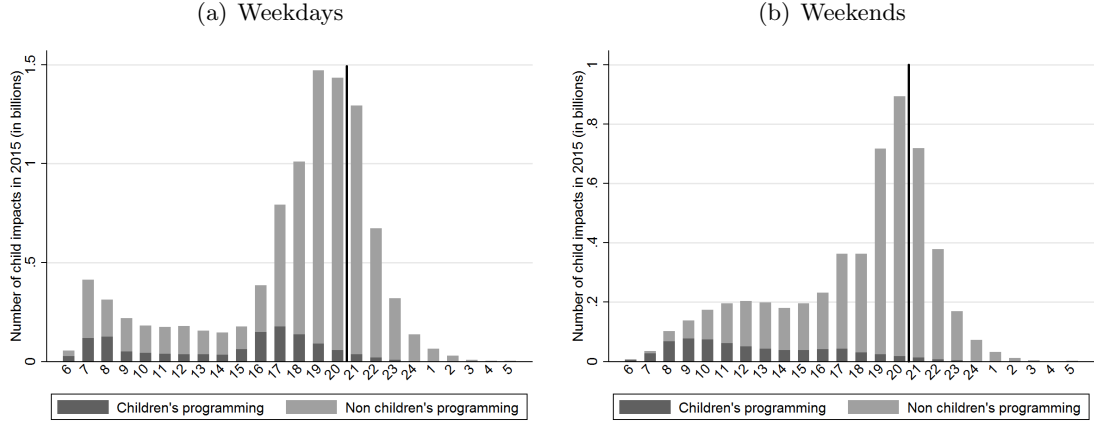


Notes: Children are defined as all individuals aged between 4 and 15 years old. Adults are defined as all individuals aged between 16 and 64.

C Child impacts by day of the week

Figure C.1 shows the total number of child impacts recorded on weekends and weekdays in each hour of the day (over all food and drink products, excluding sponsorship, summed over the entire year).

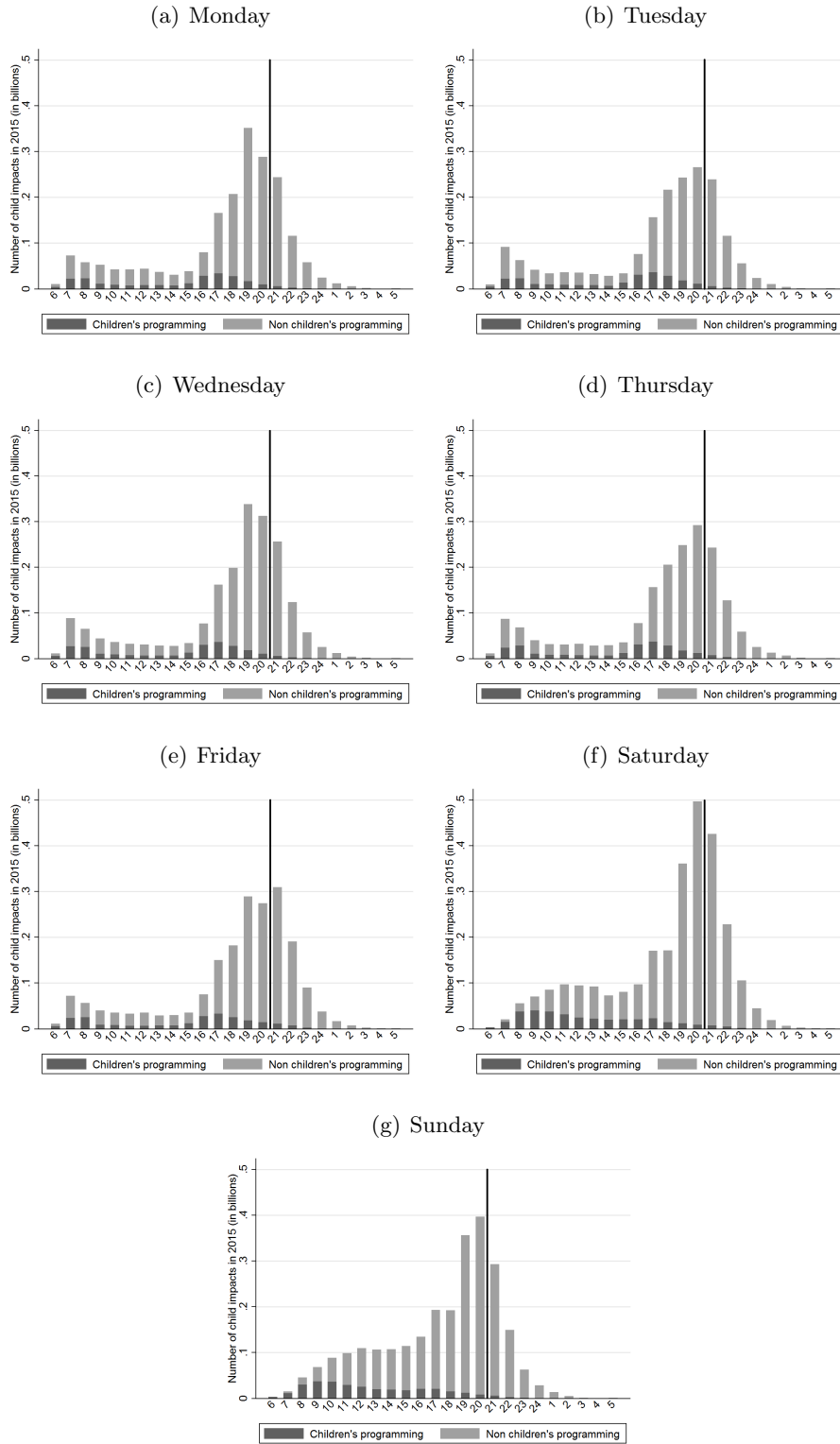
Figure C.1: *Child impacts by hour of day for weekdays and weekends*



Notes: Each bar shows the total adverts during each hour of a given period of the week (weekend or weekdays) across 2015. The dark portion of the bar shows adverts during children's programming, and the light portion of the bar shows adverts during non-children's programming. The vertical line denotes the beginning of the watershed. See Appendix E for details of how we have defined children's programming.

Figure C.2 shows the total number of child impacts recorded on each day of the week in each hour of the day (over all food and drink products, excluding sponsorship, summed over the entire year).

Figure C.2: *Child impacts by hour of the day for each day of the week*



Notes: Each bar shows the total adverts during each hour of a given day across 2015. The dark portion of the bar shows adverts during children's programming, and the light portion of the bar shows adverts during non-children's programming. The vertical line denotes the beginning of the watershed. See Appendix E for details of how we have defined children's programming.

D Defining product categories and product subcategory

In this report we use the classifications: ‘product category’ and ‘product subcategory’. We defined these classifications using the ‘Product Mid Category’ and ‘Product Minor Category’ variables provided by Nielsen. Table D.1 provides a breakdown of the how the Nielsen categories fit into our categorisation.

Table D.1: *Categorisation of products*

| Product category | Product subcategory TV | Nielsen Product Mid Category | Nielsen Product Minor Category |
|-----------------------------|------------------------------|--|---------------------------------------|
| Restaurants & Bars | Chain Restaurants | Restaurants & Bars | Chain Restaurants |
| | Fast Food Restaurants | Restaurants & Bars | Fast Food Restaurants - Food Items |
| | Independent Restaurant | Restaurants & Bars | Fast Food Restaurants - Multi Product |
| | Pubs & Bars | Restaurants & Bars | Independent Restaurants |
| | | | Pubs & Bars |
| Food Apps | Hungry House | Restaurants & Bars | Independent Restaurants |
| | Just Eat | Restaurants & Bars | Independent Restaurants |
| Brand Building | Drink - Brand Building | Drink - Brand Building | Alcoholic Drink - Other Sponsorship |
| | | Drink - Brand Building | Alcoholic Drink - Sports Sponsorship |
| | Food Brand Building | Food Brand Building | Food & Drink - Multi Product |
| | | Food Brand Building | Food - Brand Building |
| | | Food Brand Building | Food - Multi Product |
| Confectionery & Snacks | Chocolate | Confectionery & Snacks | Chocolate - Boxed/tinned |
| | | Confectionery & Snacks | Chocolate - Countlines |
| | | Confectionery & Snacks | Chocolate - Large Bars |
| | | Confectionery & Snacks | Chocolate - Large/share Bags |
| | Crisps | Confectionery & Snacks | Chocolate - Multi Pack |
| | | Confectionery & Snacks | Chocolate - Multi Product |
| | | Confectionery & Snacks | Crackers/crisp Breads |
| | | Confectionery & Snacks | Crisps/snacks - Countlines |
| | Other Confectionery & Snacks | Confectionery & Snacks | Crisps/snacks - Large/share Bags |
| | | Confectionery & Snacks | Crisps/snacks - Multi Packs |
| | | Confectionery & Snacks | Crisps/snacks - Multi Product |
| | | Confectionery & Snacks | Biscuits |
| | Sweets | Confectionery & Snacks | Chewing/bubble Gum |
| | | Confectionery & Snacks | Confectionery/snacks - Multi Product |
| | | Confectionery & Snacks | Mints |
| | | Confectionery & Snacks | Popcorn |
| Drinks | Childrens Drinks | Soft Drinks | Childrens Drinks |
| | | Drink - Multi Product | Alcohol & Non Alcohol - Multi Product |
| | Fruit Juice & Smoothies | Soft Drinks | Alcohol - Multi Product |
| | | Soft Drinks | Chilled Fruit Juice |
| | Hot Beverages | Hot Beverages | Smoothies |
| | | Hot Beverages | Coffee Filtered/ground |
| | | Hot Beverages | Coffee Instant |
| | | Hot Beverages | Coffee Machine Pods |
| | Iced Tea/iced Coffee | Hot Beverages | Hot Beverages - Multi Product |
| | | Hot Beverages | Tea Bags |
| | | Hot Beverages | Tea Loose/leaf |
| | | Soft Drinks | Iced Tea/iced Coffee |
| | Milk Drinks | Soft Drinks | Milk Drinks |
| | | Soft Drinks | Milk Drinks |
| | Soft Drinks | Soft Drinks | Carbonated - Bottles |
| | | Soft Drinks | Carbonated - Cans |
| Sports/energy/health Drinks | Soft Drinks | Soft Drinks - Multi Product | |
| | Sports/energy/health Drinks | Energy Drinks | |
| | Sports/energy/health Drinks | Pro Biotics & Cholesterol Reducing Drink | |
| | Sports/energy/health Drinks | Sports Drinks | |
| Squash | Sports/energy/health Drinks | Stimulation Drinks | |
| | Soft Drinks | Squash | |
| Water | Soft Drinks | Water - Flavoured | |
| | Soft Drinks | Water - Sparkling | |
| | Soft Drinks | Water - Still | |
| Other | | All other mid categories | All minor categories |

O Notes: The ‘Other’ product category includes all other Nielsen product mid and minor categories. The Nielsen product mid categories that fall into our ‘Other’ product category are: Baby & Toddler Food, Bakery, Beer Lager & Cider, Dairy, Delicatessen/Chilled Food, Fish, Food Cupboard/Grocery, Free From, Frozen Food, Fruit, Meat/Poultry, Ready/Prepared Meals, Salad/vegetables, Spirits & Liqueurs, Wine

E Defining children’s programming

E.1 Regulation

CAP Code 32.5.1 The following may not be advertised in or adjacent to childrens programmes or programmes commissioned for, principally directed at or likely to appeal particularly to audiences below the age of 16: food or drink products that are assessed as high in fat, salt or sugar (HFSS) in accordance with the nutrient profiling scheme published by the Food Standards Agency (FSA) on 6 December 2005.

These limitations have been in place since 2007, with the code having been written by the Committee of Advertising Practice (CAP) and enforced by the ASA (Advertising Standards Authority).

The ASA website explains this requirement as meaning that such ads do not appear in ‘children’s media’ (i.e. where under 16s are the main target audience) or other media where under-16s make up more than 25% of the audience. It also states that marketers are expected to hold evidence to support their placement choices.

E.2 Data

The data provided by Nielsen specify the programmes that were shown before and after the advert, and the channel that they are shown on. They also provide a classification of the genre of the programme shown *before* the advert (but not after). We use this, along with the impacts data, to classify programmes and channels that are likely to be subject to the regulation as described above.

There are seven genres provided by Nielsen that we aggregate into one ‘Children’ category. We group channels into 7 categories: ITV, Channel 4, Channel 5, Cable: Children, Cable: Sports, Cable: Movies, Cable: Other. ‘Cable: Children’ are channels for which more than 70% of total impacts are during children’s programmes (defined using genre, described above).

The impacts data record the number of pairs of eyes that view an advert. Although we do not have data on the audience figures of the TV programmes directly, we can use information on the composition of the audience that see the adverts shown before or during the programmes. We have information on the impacts separately by children (aged 4-16) and adults (aged 16-64). We do not have information on the impacts for people aged 65 and above.

Using the genre and channel definition we define children’s programmes as those that either (i) are in the genre category ‘Children’ or (ii) are shown on channels in the channel group ‘Cable: Children’. These are programmes for which we think is likely that the restrictions around advertising HFSS apply.

We verify this by looking at the share of total impacts for programme-channel pairs that are made up of children’s impacts. The regulation states that if the audience is greater than 25% children, then HFSS foods cannot be advertised. We use the impact

share of children to proxy for this. This is not precisely the measure used by the advertising authorities because (i) we do not measure impacts for people aged over 65, (ii) our measure aggregates impacts over the whole year, and (iii) we are looking at impacts of adverts shown during or before the programmes, not impacts of the programmes themselves.

However, it should give a fairly good indication of whether we have defined a set of programmes for which the advertising restrictions are likely to apply. Table E.1 shows that only 0.75% of total impacts during children’s programming occur during programme-channel pairs that have a children impact share below 25%; conversely, only 0.43% of total impacts during non children’s programming occur during programme-channel pairs that have a children impact share above 25%.

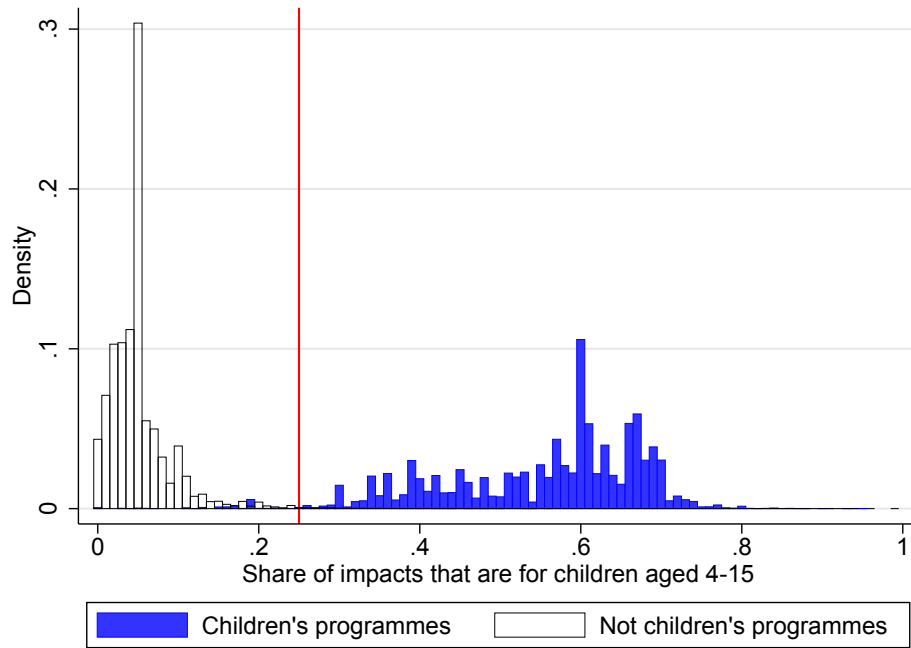
Table E.1: *Impact shares and children’s programming*

| | Share of total impacts on programme-channel pairs for which the children impact share is: | |
|---------------------------|---|-----------|
| | Below 25% | Above 25% |
| Children’s programmes | 0.75 | 99.25 |
| Not children’s programmes | 99.57 | 0.43 |

Notes: We define children’s programmes as those that either (i) are in the genre category ‘Children’ or (ii) are shown on channels in the channel group ‘Cable: Children’. For each programme-channel pair we calculate the share of total (for people aged between 4 and 64) impacts that are made up by children (aged 4-16). We define an indicator equal to 1 if this share is above 25%. The numbers show the share of total impacts for children’s programmes (row 1) and not children’s programmes (row 2) that occur during programme-channel in which this indicator is equal to 1 or not.

We also show the impact weighted distribution of children impact shares across programme-channels, by children’s and not children’s programmes, respectively, see Figure E.1. The figure shows that the two distributions of children impact shares across the two sets of programmes are almost disjoint, with very few child impact shares below 0.25 for children’s programmes and very few child impact shares above 0.25 for not children’s programmes.

Figure E.1: *Impact weighted distribution of children impact shares across programme-channels*



Notes: For each programme-channel pair we calculate the share of total (for people aged between 4 and 64) impacts that are made up by children (aged 4-15). The figure shows the share of impacts across programme-channels that fall into 0.01 width bins of this measure, drawn separately for children's programmes and not children's programmes. We define children's programmes as those that either (i) are in the genre category 'Children' or (ii) are shown on channels in the channel group 'Cable: Children'. The red line is at 0.25.