



THE HENRY J.
KAISER
FAMILY
FOUNDATION

FOOD FOR THOUGHT

Television Food Advertising to Children in the United States

EXECUTIVE SUMMARY

A KAISER FAMILY FOUNDATION REPORT

MARCH 2007



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Introduction

As policymakers, consumer advocates and health organizations have sought to address the increasing problem of childhood obesity in this country, one of the many potential variables they've focused on has been the abundance of food advertising seen by children, particularly on TV. The Institute of Medicine (IOM) convened an expert committee that conducted an exhaustive review of research concerning the relationship between food marketing and children's diets. The committee concluded that "Television advertising influences the food preferences, purchase requests, and diets, at least of children under age 12 years, and is associated with the increased rates of obesity among children and youth" (IOM, 2006). The IOM panel recommended a shift in the balance of food advertising to children, toward healthier options.

In addition, the Federal Trade Commission (FTC) and Department of Health and Human Services (HHS) issued a report with a similar recommendation; the American Academy of Pediatrics called for a ban on ads for what they called "junk food" in shows aimed at young children; and the Federal Communications Commission formed a new task force on media and childhood obesity. In Great Britain, policymakers have banned ads for foods high in fat, salt or sugar in programming aimed at children under 16, and have prohibited the use of premiums or children's characters in food ads to young people.

In December 2006, ten of the top food companies in the U.S. announced a new Children's Food and Beverage Advertising Initiative, which includes a commitment to devote at least 50% of all advertising to healthier foods or to messages that encourage fitness or nutrition.

The purpose of this study is to paint a picture of the current landscape of food advertising to children on TV, to help inform the efforts of policymakers and the food and media industries and to provide a benchmark for measuring change in the years ahead.

The study presented here is the largest ever conducted of television advertising to children. Where previous studies have typically used samples of 40–50 hours of programming, this study uses more than 1,600 hours.

It covers all genres of programming viewed by children, rather than just children's shows, and combines a detailed analysis of advertising content with viewing data from a large national sample of children, to determine how many ads young people actually see given the mix of programming they watch. Previous studies have not accounted for the proportion of children's viewing that is of children's vs. non-children's programs, or is on cable vs. broadcast or ad-supported vs. commercial-free networks.

Having an accurate picture of the current landscape with regard to food advertising to children is important as the country moves forward in the effort to combat childhood obesity. If we overestimate the presence of food marketing in children's lives, or its role in their diets, we may place too much faith in marketing-oriented policy solutions; if we underestimate it, we may neglect important policy options. Government agencies and advisory bodies have faced frustrating obstacles in getting the data they seek to help inform their deliberations; it is the purpose of this report to help fill at least some of the gaps in their knowledge, and to provide a benchmark from which to measure future changes in the food marketing arena.

Overview Of Methodology

Programming Sample

Because children's viewing habits vary substantially by age, the study's findings are presented separately for children ages 2–7, 8–12, and 13–17. Nielsen data were used to determine the top 10 networks for each of the three age groups in the study. Any network in the top 10 for any one of the age groups was included in the sample. Black Entertainment Television (BET) was also included because previous Kaiser Family Foundation research had found it to be in the top 10 networks among all 8–18-year-olds and the number-one network for African American youth ages 8–18. In all, 13 networks were included. Six were commercial broadcast networks: ABC, CBS, Fox, NBC, WB, and UPN.¹ Six were commercial cable networks: ABC Family, BET, The Cartoon Network, Disney, MTV, and Nickelodeon. The final network was PBS, a non-commercial broadcast network.

¹ Since this study was conducted, the WB and UPN have merged into a new network, The CW.

TOP TEN NETWORKS AMONG CHILDREN & TEENS		
Ages 2-8	Ages 9-11	Ages 12-17
Nickelodeon	Nickelodeon	Fox
Cartoon Network*	Disney	Disney*
Disney*	Cartoon Network	Nickelodeon*
PBS	ABC*	Cartoon Network**
ABC**	Fox*	MTV**
CBS**	WB*	NBC**
Fox**	ABC Family **	ABC***
NBC**	CBS**	CBS***
WB	NBC**	WB***
ABC Family***	PBS	ABC Family
UPN***		

Note: Asterisks (* and ** and ***) indicate a tie between those networks that share a symbol. Nielsen age categories differ slightly from those used in the study. Source: Nielsen Media Research, 2003–2004

For each network, a week’s worth of programming was analyzed, using the composite week sampling method to minimize the potential of capturing atypical programming. All programming from 6:00 a.m. through midnight was recorded. The bulk of the sample was collected from the last week in May through mid-July 2005; an additional 150 hours were recorded from mid-July through the first week of September, and 12 hours were recorded after September. A total of 1,638 hours of content were recorded and analyzed, 126 hours for each of the 13 networks.

Coding the Sample

All programming was reviewed by researchers trained through the Department of Telecommunications at Indiana University, and all non-program content was coded. Every coder completed approximately 17 hours of formal training over a 6-week period, plus nine hours of homework assignments. Final intercoder reliability scores ranged from .86 to 1.00. These scores are very good and are consistent with publication standards for refereed journals.

A total of 40,152 ads and 996 public service announcements (PSAs) were identified and coded by type of product, service, or issue (See Table 1). Of these ads, a total of 8,854 were for food or beverages. The food ads were coded across 35 variables (described in detail in Methodology), including type of food, primary persuasive

appeal, target audience, use of premiums, depiction of physical activity, health claims, and promotion of a website. The network, day of week, time of day, and genre of programming were also recorded for each food ad and PSA. Using SPSS, the amount and nature of food advertising and PSAs were then calculated for the entire program sample, as well as for each network, day of week, time of day, and genre.

Viewing Patterns

Data from the Kaiser Family Foundation’s previous studies of children’s media use (Roberts & Foehr, 2004; Roberts & Foehr, 2005) were used for estimates of the total amount of television viewing by each of the three age groups, as well as the proportion of viewing for each network, day of week, and genre. These results data were combined with the data on advertising content to yield estimates of the amount and nature of advertising actually seen by children. These results take into account children’s viewing patterns, including the total amount of time they spend viewing, and the proportion of their viewing time that is spent watching cable vs. broadcast, weekend vs. weekday, ad-supported vs. commercial-free, and children’s vs. non-children’s programming.

Key Findings

Overall exposure to advertising among children (on all topics)

- Given the amount of time they spend watching TV each day and the mix in programming and networks that they view, children ages 2–7 see an average of 17 minutes of advertising a day (17:32 min, 38 ads) for all products (toys, food, media, and so on). For 8–12-year-olds, the comparable figure is 37 minutes a day of advertising (37:44 min, 83 ads). For 13–17-year-olds, it’s 35 minutes a day of advertising (35:47 min, 79 ads).
- From an annual perspective, children ages 2–7 are exposed to an average of 13,904 TV ads a year for all products, while the comparable figures are 30,155 ads for 8–12-year-olds, and 28,655 ads for teens ages 13–17. This represents more than 106 hours (106:39 hr) a year of advertising for the 2–7-year-olds, nearly 230 hours (229:31 hr) a year for the 8–12-year-olds, and 217 hours (217:37 hr) a year for the 13–17-year-olds.

Exposure to food advertising among children

- Children ages 2–7 see an average of 12 food ads a day on TV. Over the course of a year, this translates into an average of more than 4,400 food ads—nearly 30 hours (29:31 hr) of food advertising.
- Children ages 8–12 see an average of 21 food ads a day on TV. Over the course of a year, this translates into an average of more than 7,600 food ads—over 50 hours (50:48 hr) of food advertising.
- Teenagers ages 13–17 see an average of 17 food ads a day on TV. Over the course of a year, this translates into an average of more than 6,000 food ads—over 40 hours (40:50 hr) of food advertising.
- Half (50%) of all ad time on children’s shows is for food.
- Among all ads children see, food is the largest product category for all ages (32% for 2–7-year-olds, 25% for 8–12-year-olds, and 22% for 13–17-year-olds), followed by media and travel/entertainment.

CHILDREN’S EXPOSURE TO FOOD ADVERTISING ON TV, ON AVERAGE:

AGE	Number of Food Ads Seen per Day*	Number of Food Ads Seen per Year	Hr: Min of Food Ads Seen per Year
2–7	12	4,427	29:31
8–12	21	7,609	50:48
13–17	17	6,098	40:50

*The estimate of food ads seen per day has been rounded to the nearest whole number. For the calculation of the number of food ads seen per year, the more precise figure was used.

Types of food products in ads targeting children and teens

- 34% are for candy and snacks, 28% are for cereal, and 10% are for fast food.
- 4% are for dairy products, 1% are for fruit juices, and none are for fruits or vegetables.

Appeals used in food ads targeting children or teens

- Among all food ads targeting children and teens, the most common primary appeal is taste (34% of all ads), followed by fun (18%), the inclusion of premiums or contests (16%), and the fact that a product is unique or new (10%).
- Two percent of all food ads targeting children or teens use claims about health or nutrition as a primary or secondary appeal in the ad, while 5% use pep or energy as a primary or secondary appeal.

Other attributes of food advertising to children or teens

- 22% include a disclaimer (e.g., “part of a balanced diet”)
- 20% promote a website
- 19% offer a premium
- 15% portray an active lifestyle
- 13% include at least one specific health claim
- 11% use a children’s TV or movie character
- 7% feature a contest or sweepstakes

Exposure to PSAs on fitness and nutrition among children

- Children ages 2–7 see an average of one PSA on fitness or nutrition every 2-3 days. Over the course of a year, this translates into an average of 164 PSAs on fitness or nutrition, or 1 hour and 25 minutes.
- Children ages 8–12 see an average of one PSA on fitness or nutrition every 2-3 days. Over the course of a year, this translates into an average of 158 PSAs on fitness or nutrition, or 1 hour and 15 minutes worth of such messages.
- Teenagers ages 13–17 see less than one PSA on fitness or nutrition per week. Over the course of a year, this translates into an average of 47 PSAs on fitness or nutrition, or 25 minutes of such content.

CHILDREN’S EXPOSURE TO PUBLIC SERVICE MESSAGES ON FITNESS OR NUTRITION ON TV, ON AVERAGE:

AGE	Min: Sec of PSAs on Fitness/Nutrition Seen per Day	Number of PSAs on Fitness/Nutrition Seen per Year	Hr: Min of PSAs on Fitness/Nutrition Seen per Year
2–7	0:14	164	1:25
8–12	0:12	158	1:15
13–17	0:04	47	0:25

Conclusion

Children of all ages are exposed to a substantial amount of advertising for food and beverages, but their exposure varies significantly by age. Because children 8–12 watch so much television, and therefore see so many food ads, they may be the group *most* affected by food marketing. This is also likely to be an especially important age for the development of children’s food habits, since they are likely to have more time away from their parents, have their own money, and have more opportunity to make their own food choices. Therefore, policymakers and industry leaders may want to pay special attention to advertising seen by tweens.

It is clear that food and beverages continue to dominate the television advertising landscape, particularly for children. Food is the most widely advertised product on the networks in the study, and among children’s shows, fully half (50%) of all ad time is for food. Therefore, policies that impact food advertising are likely to impact the children’s television world as well.

Most of the food ads that children and teens see on TV are for foods that nutritionists, watchdog groups, and government agencies argue should be consumed either in moderation, occasionally, or in small portions. Of the 8,854 food ads reviewed in the study, there were no ads for fruits or vegetables targeted at children or teens. As the food industry moves ahead with the commitment to shift the balance of products advertised to children, it will be important to have independent research to track changes.

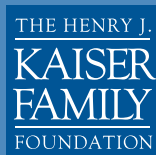
Among all food ads targeting children, only a relatively small proportion (15%) currently depict a physically active lifestyle. Both the IOM and the FTC/HHS reports recommended that food advertisers include more such depictions in their ads, and the food industry initiative promises change in this area. This study will provide a useful benchmark against which to measure progress.

Some ads appeal to young people with enticements such as free gifts or sweepstakes (19%) that they can win by purchasing the product, an issue that has been a concern to policymakers in other countries, such as Great Britain, where such practices were recently prohibited (Office of

Communications, 2006). A relatively small proportion—just over 1 in 10—use a children’s character from TV or movies, another practice that has drawn concern from advocates and was recently banned in food advertising to children in Great Britain.

Finally, the study underscores the limited expectations that policymakers should place on public service campaigns on fitness and nutrition. Given these campaigns’ reliance on donated ad space (or limited campaign budgets), it is not surprising that children see very few such messages. For example, children under 8 see one PSA on fitness or nutrition for every 26 food ads; for tweens, it’s one PSA for every 48 food ads; and for teens, it’s one for every 130 food ads. While this certainly does not mean there isn’t an important role for PSAs in the fight against childhood obesity, it does indicate that those undertaking educational campaigns should have limited expectations, or a substantial budget.

This study does not address the issue of whether food advertising to children on TV is going up or down, nor does it address the issue of whether such advertising influences what kids eat, or should be in any way restricted, either through voluntary industry efforts or through regulatory policy. What it does indicate, however, is that food marketing is a predominant part of the television advertising landscape for children, and that young people’s exposure to such messages is substantial, while their exposure to countervailing health messages on TV is minimal.



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