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RUDD REPORT



TRENDS IN TELEVISION FOOD ADVERTISING TO YOUNG PEOPLE

2010 Update

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YALE RUDD CENTER
FOR FOOD POLICY & OBESITY

TRENDS IN TELEVISION FOOD ADVERTISING TO YOUNG PEOPLE: 2010 UPDATE

Executive Summary

In 2010, there was a dramatic reversal of the progress previously observed in reducing children's exposure to food, beverage, and restaurant advertising on television. From 2004 to 2008, exposure had declined by 12%; however, in 2010, children viewed 9% more food and beverage advertisements on television compared to 2008 - on average, 13.4 television food ads every day. Adolescent exposure to television food advertising also increased by 11%, averaging 16.2 food ads per day, and representing the highest level of exposure seen in the past nine years.

Examination of exposure to advertising for individual food categories did reveal some positive changes in 2010. Children viewed fewer ads for sweet snacks and crackers/savory snacks; advertising for these two primarily unhealthy categories declined by 26% and 18% respectively from 2008. In addition, young people's exposure to advertising for fruits and vegetables doubled, although these ads continued to account for less than 1% of all food ads seen.

Exposure to advertising for other primarily unhealthy products, however, increased substantially. Children and adolescents viewed more than twice as many advertisements for candy products in 2010 compared to 2008. For children, candy became the second most often viewed food and beverage product advertisement (exceeded only by cereals). Youth exposure to carbonated beverage ads also increased by more than two-thirds. In addition, restaurant advertising viewed by children increased by 8%; even though advertising viewed by adults increased by just 2%.

These findings demonstrate that current industry self-regulation through the Children's Food and Beverage Advertising Initiative has not substantially shifted the mix of food advertising to children to more nutritious products. In addition, they suggest that many companies are not fully committed to reducing child exposure to advertising for their least nutritious products.

Background

This analysis updates the Rudd Report, *Trends in television food advertising: Progress in reducing unhealthy marketing to young people?* (available at http://www.yaleruddcenter.org/resources/upload/docs/what/reports/RuddReport_TVFoodAdvertising_2.10.pdf). The previous report documented trends in food advertisements viewed by children, adolescents, and adults from 2002 through 2008. As in the previous report, gross ratings points (GRP) data were obtained from Nielsen. These are the same data used by advertisers to measure the reach and frequency of their advertising campaigns. We licensed data for 2010 and used the methods from the previous report to assess youth exposure to food advertising in 2010 in total and by product category, as well as changes in exposure from 2004. The Appendix provides detailed GRP data by age group and food category for 2002 through 2010.

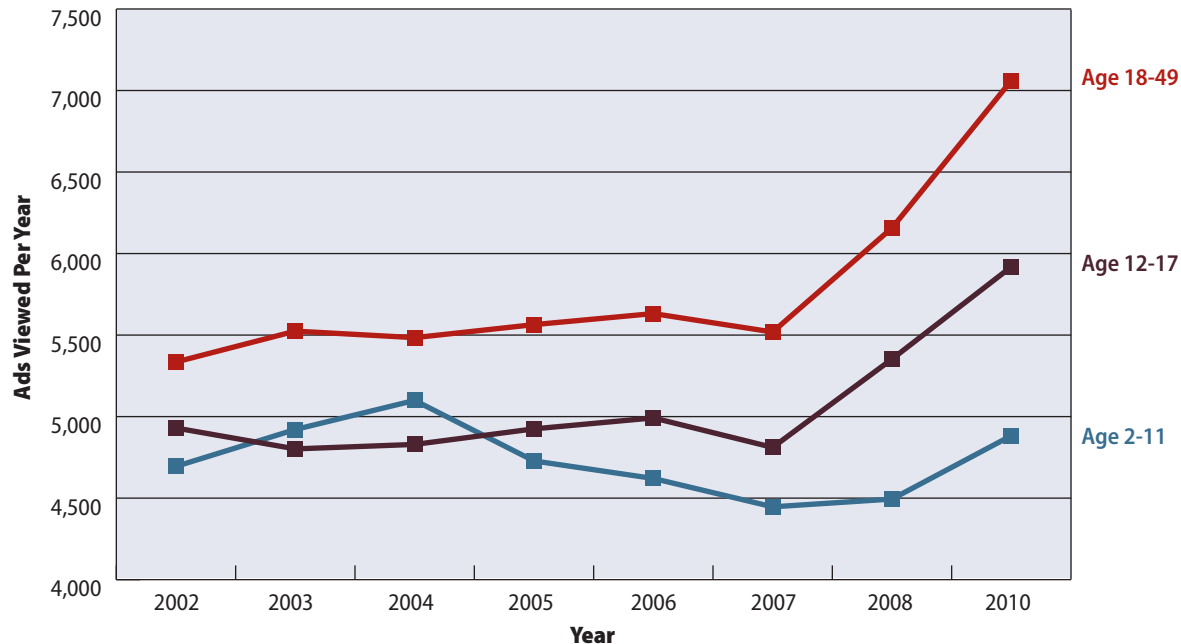
Changes in youth exposure to food advertising on television: 2004 to 2010

As reported in our previous study, children's exposure to all food advertising on television peaked in 2004 - when the average child (aged 2-11) viewed 14.0 food ads per day - and then declined by 12% to 12.3 ads viewed per day in 2008. However, 2010 saw a dramatic reversal of this positive trend (see Figure 1). In 2010, the average child viewed 13.4 food ads per day, an increase of 9% from 2008 and just 4% fewer than the 14.0 ads per day viewed in 2004.

Adolescent exposure to television food advertising in 2010 increased by 11% compared to 2008; the average teen (aged 12-17) viewed 16.2 food ads viewed per day. This increase followed a comparable 11% increase from 2007 to 2008. Adolescents viewed 3.0 additional food ads per day in 2010 compared to



Figure 1. Total television food and beverage advertising exposure by age: 2001 to 2010



2004, an increase of 23%. Adult exposure increased at an even greater rate; in 2010, adults viewed 15% more ads than in 2008 (19.3 ads per day vs. 16.9) and 29% more compared to 2004 (15.0 ads per day).

Changes in exposure by category

Among children, increases in exposure to advertising from 2008 to 2010 approached 9% for both packaged foods and beverages, and restaurants. Adolescent and adult exposure to packaged food advertising increased substantially (19% and 24%, respectively) while exposure to restaurant advertising remained flat (-2% and +2%).

Changes in exposure to advertising for individual food categories varied by age group, but some findings were consistent (see Tables 1 and 2). Positive trends included increased exposure to advertising for fruits and vegetables and other dairy (not yogurt) for all age groups. Fruits and vegetables continued, however, to represent less than 1% of all food ads viewed by children and adolescents. Above-average increases for all age groups also occurred for yogurt (10-17%) and for juices, fruit beverages, and sports drinks (15-22%). Exposure to cereal

advertising exhibited lower-than-average increases at 8% or less for all ages. Bottled water was the only category that exhibited declines in exposure across all age groups.

Three product categories were notable for reducing food advertising viewed by children while at the same time increasing advertising to adults: sweet snacks (including cookies, baked goods, and frozen desserts), crackers and savory snacks, and prepared meals. In 2010, children viewed 26% fewer ads for sweet snacks compared to 2008 and fewer than half the number of ads viewed in 2004. Similarly, child exposure to crackers and savory snack advertising declined by 18% compared to 2008 and by 29% versus 2004. In spite of the small decline seen from 2008 to 2010, exposure to advertising for prepared meals was 26% higher in 2010 compared to 2004. In these categories, adolescent exposure also decreased or increased at a lower rate than adult exposure.

Changes in advertising exposure for other food categories raise public health concerns. Child exposure to restaurant advertising, including fast food and other restaurants, maintained its pattern of continuous increases since 2002. In 2010, children viewed 4.8 restaurant ads per day, 8% more than they viewed in 2008 and 39% more than they viewed in 2002. This increase in child expo-



Table 1: Changes in television food advertising exposure for children (2-11 years): 2004 to 2010

Category	Ads viewed per year			Change in ads viewed: 2010 vs.	
	2004	2008	2010	2004	2008
Food and beverage products*	3,847	2,889	3,145	-18.2%	8.9%
Cereals	973	701	754	-22.5%	7.6%
Candy	397	209	413	4.0%	97.6%
Prepared meals	306	400	384	25.5%	-4.0%
Sweet snacks	637	379	282	-55.7%	-25.6%
Juices, fruit beverages and sports drinks	316	246	282	-10.8%	14.6%
Yogurt	204	215	251	23.0%	16.7%
Crackers and savory snacks	147	127	104	-29.3%	-18.1%
Carbonated beverages	141	47	80	-43.3%	70.2%
Other dairy	72	53	77	6.9%	45.3%
Fruits and vegetables	4	20	38	850.0%	90.0%
Bottled water	17	37	10	-41.2%	-73.0%
Restaurants	1,252	1,604	1,738	38.8%	8.4%
Fast food	911	1,106	1,178	29.3%	6.5%
Other restaurants	341	498	560	64.2%	12.4%
Total Food and Beverage	5,099	4,494	4,883	-4.2%	8.7%

* Includes all packaged food and beverage product categories

Table 2: Changes in television food advertising exposure for adolescents (12-17 years): 2004 to 2010

Category	Ads viewed per year			Change in ads viewed: 2010 vs.	
	2004	2008	2010	2004	2008
Food and beverage products*	3,200	3,063	3,641	13.8%	18.9%
Candy	400	296	618	54.5%	108.8%
Cereals	464	469	493	6.3%	5.1%
Prepared meals	266	409	441	65.8%	7.8%
Juices, fruit beverages and sports drinks	318	329	402	26.4%	22.2%
Sweet snacks	356	333	320	-10.1%	-3.9%
Yogurt	105	171	188	79.0%	9.9%
Carbonated beverages	295	102	169	-42.7%	65.7%
Crackers and savory snacks	147	117	114	-22.4%	-2.6%
Other dairy	96	78	101	5.2%	29.5%
Fruits and vegetables	6	23	50	733.3%	117.4%
Bottled water	33	56	22	-33.3%	-60.7%
Restaurants	1,629	2,288	2,279	39.9%	-0.4%
Fast food	1,260	1,684	1,687	33.9%	0.2%
Other restaurants	369	605	592	60.4%	-2.1%
Total Food and Beverage	4,829	5,353	5,919	22.6%	10.6%

* Includes all packaged food and beverage product categories



sure from 2008 to 2010 was also greater than the 2% increase in adult exposure. Of note, adolescent exposure to restaurant advertising remained virtually the same in 2010 compared to 2008, in contrast to continuous increases from 2004 to 2008 totaling 40%.

Of additional concern, advertising for two of the least nutritious product categories, carbonated beverages and candy (excludes gum and mints), increased dramatically from 2008 to 2010. Although representing just 2% of children's total exposure to food advertising, carbonated beverage advertising increased by 70% from 2008 to 2010, an even greater increase than the 57% increase in ads viewed by adults. Increases in exposure to candy advertising were even more dramatic, doubling from 2008 to 2010 among all age groups and reversing the substantial declines seen from 2004 to 2008. In 2010, children viewed 97% more candy ads compared to 2008, and candy overtook prepared meals as the second most-viewed category of food advertising (exceeded only by cereal ads). Similarly, adolescent exposure to candy ads increased by 109%, and candy became the most frequent category advertised to this age group.

Conclusion

These numbers reflect three years of data on child and adolescent exposure to food advertising on television since the launch of the Children's Food and Beverage Advertising Initiative (CFBAI) in 2008. The stated goal of the CFBAI was "to shift the mix of advertising primarily directed to children to encourage healthier dietary choices."¹ In spite of this goal, total child exposure to advertising for six of the least nutritious product categories (candy, sweet snacks, crackers/savory snacks, carbonated beverages, fast food, and other restaurants) increased by 60% from 2008 to 2010; these categories now represent 78% of all food ads viewed by children, compared to 53% in 2008.

A few trends indicate some improvement in children's exposure to unhealthy food advertising. Exposure to advertising for sweet snacks and crackers/savory snacks continued declines observed since 2004. Adolescent exposure to advertising for these products also declined somewhat from 2008 to 2010. These trends were notable as adult exposure to the same products increased substantially during this period. CFBAI companies in these categories should be commended, and these findings demonstrate

that companies can reduce youth exposure to advertising for their products without reducing advertising to adults. In addition, advertising for fruits and vegetables continued to increase, although children viewed just three of these ads each month in 2010.

Unfortunately, recent increases in advertising for restaurants and candy substantially offset the progress made in other categories. These increases highlight four significant limitations of the current CFBAI industry self-regulatory initiative:

- **Participation in the CFBAI is voluntary.** Just two restaurants (McDonald's and Burger King) and four candy companies (Mars, Hershey, Nestle and Kraft) have joined the CFBAI.² Although most of the largest children's food advertisers are included, non-participating companies have a competitive advantage as they are not restricted by advertising limitations. In the other restaurant category, for example, Chuck E Cheese continues to advertise extensively on children's television programming.³

- **Participation in the CFBAI does not limit advertising on general audience programming viewed by large numbers of children.** The increases in candy and carbonated beverage advertising demonstrate this shortcoming. All CFBAI participating companies have pledged that they will not advertise these products in child-targeted media,⁴ and content analysis of advertising on children's television confirm that carbonated beverages are no longer advertised on these forms of programming.⁵ However, the increase in carbonated beverage advertising viewed by children was even higher than the increase for adolescents and adults. These results indicate that companies may be placing their ads on programs viewed by disproportionately more children than older age groups, although the programs do not meet the cut-off for child-targeted programming specified in their CFBAI pledges.

In the candy category, further examination of advertising for the four companies that belong to the CFBAI showed that child exposure to advertising for these companies increased by 140% from 2008 to 2010. Exposure to Hershey's candy ads, including Reese's Pieces, Reese's Peanut Butter Cups, and Twizzlers, increased more than five-fold (from 34 to 183 ads viewed per year), and advertising for the other three companies increased by 20% to 87%.



■ **Participation in the CFBAI allows companies to advertise primarily unhealthy products and brands with no limitations.** The increases in advertising for fast food restaurants illustrate this shortcoming. A recent analysis of fast food advertising showed that McDonald's and Burger King comprised more than 40% of ads viewed by children, and both increased their advertising to children by more than 20% from 2007 to 2009.⁶ Content analysis of their child-targeted ads demonstrated that neither actively promoted their healthy kids' meal sides and drinks; rather, the ads focused mostly on the Happy Meal box (McDonald's) or the specific toys that come with the kids' meals (Burger King). As most children continue to consume foods high in fat, sugar, and sodium when they visit these restaurants, increased advertising exposure is not likely to improve children's health.

■ **CFBAI pledges do not limit food marketing to adolescents.** Adolescent exposure to food and beverage advertising increased by 11% from 2007 to 2008 and an additional 11% from 2008 to 2010. These findings support concerns that companies may simply shift their youth-targeted marketing efforts from children to a still-vulnerable adolescent audience.⁷

None of these trends indicate that CFBAI participants have not upheld their pledges to limit advertising for products they have defined as "better-for-you" on child-targeted television. However, they demonstrate limited progress in reducing youth exposure to food advertising overall, as well as disproportionate increases in advertising for some of the least nutritious product categories. The findings highlight the need for substantial improvements to food industry self-regulation, such as the recent Interagency Working Group recommendations to reexamine definitions of child-targeted marketing and marketing to adolescents, as essential to improving young people's health.⁸

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Appendix A: GRPs by age and category from 2002 through 2010

National and spot market GRPs: Ages 2-11 years								
	2002	2003	2004	2005	2006	2007	2008	2010
Food and Beverage Products (total)*	344,595	368,195	384,709	339,813	323,365	303,581	288,925	314,529
Bottled water	1,397	1,185	1,682	2,234	5,215	5,459	3,713	997
Candy	43,024	46,071	39,659	33,711	30,721	26,641	20,930	41,306
Carbonated beverages	15,118	13,282	14,125	13,676	8,699	5,708	4,665	8,039
Cereal	76,505	88,337	97,251	92,005	86,371	77,151	70,127	75,394
Crackers and savory snacks	14,051	13,685	14,678	13,703	11,761	12,103	12,688	10,401
Fruits and vegetables	1,222	672	432	513	1,426	2,169	1,994	3,758
Juice, fruit drinks, sports	34,339	31,471	31,563	27,058	21,568	18,891	24,634	28,196
Other dairy	9,695	6,737	7,237	5,511	6,907	4,341	5,335	7,715
Prepared meals	31,420	29,583	30,627	33,687	38,835	42,016	39,957	38,353
Sweet snacks	52,265	59,874	63,695	46,367	46,404	43,139	37,923	28,180
Yogurt	17,157	20,847	20,386	15,751	12,808	17,813	21,480	25,108
Restaurants	124,874	123,897	125,224	132,990	138,694	141,028	160,360	173,765
Fast food	94,621	91,140	91,128	94,109	96,142	97,281	110,571	117,806
Other restaurants	30,253	32,757	34,096	38,880	42,553	43,746	49,789	55,959
Total Food and Beverage	469,469	492,092	509,933	472,803	462,060	444,609	449,425	488,294

* Includes all packaged food and beverage product categories
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National and spot market GRPs: Ages 12-17 years								
	2002	2003	2004	2005	2006	2007	2008	2010
Food and Beverage Products (total)*	329,953	320,481	320,034	312,165	304,335	288,261	306,292	364,061
Bottled water	3,293	2,407	3,319	4,058	4,717	7,022	5,594	2,174
Candy	45,302	46,872	39,969	34,489	35,141	31,090	29,638	61,799
Carbonated beverages	30,024	26,786	29,477	31,758	19,799	12,352	10,190	16,875
Cereal	45,669	46,089	46,425	51,280	48,901	44,332	46,922	49,340
Crackers and savory snacks	16,934	14,945	14,704	12,836	13,594	11,779	11,682	11,388
Fruits and vegetables	1,642	1,096	633	769	1,419	2,173	2,333	4,980
Juice, fruit drinks, sports	32,823	33,015	31,811	30,589	25,442	23,515	32,864	40,197
Other dairy	9,590	7,985	9,578	7,874	8,937	6,137	7,800	10,103
Prepared meals	34,123	29,431	26,569	31,766	35,902	41,786	40,851	44,075
Sweet snacks	36,879	34,900	35,610	31,938	37,017	30,997	33,341	32,040
Yogurt	9,370	11,016	10,460	8,458	8,016	12,926	17,089	18,761
Restaurants	163,034	159,712	162,906	180,316	194,873	192,844	228,829	227,873
Fast food	129,261	123,205	126,021	136,408	144,275	143,687	168,372	168,668
Other restaurants	33,772	36,507	36,885	43,908	50,598	49,156	60,457	59,205
Total Food and Beverage	492,987	480,193	482,940	492,481	499,208	481,105	535,287	591,934

* Includes all packaged food and beverage product categories
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Appendix A: GRPs by age and category from 2002 through 2010 CONTINUED

National and spot market GRPs: Ages 18-49								
	2002	2003	2004	2005	2006	2007	2008	2010
Food and Beverage Products (total)*	336,522	347,743	345,298	339,410	336,190	322,105	347,161	431,594
Bottled water	3,881	3,200	4,220	5,871	5,477	7,185	5,947	2,179
Candy	37,453	41,498	34,227	29,449	29,684	28,696	29,414	64,214
Carbonated beverages	25,719	24,432	26,885	29,183	19,001	12,915	11,093	17,391
Cereal	32,230	38,387	37,531	43,343	39,638	37,848	41,374	43,901
Crackers and savory snacks	19,158	17,915	15,425	13,254	15,098	12,793	13,302	14,976
Fruits and vegetables	2,628	2,016	1,357	1,583	2,574	4,263	4,642	8,268
Juice, fruit drinks, sports	29,923	33,269	34,559	33,747	30,900	27,270	37,176	44,880
Other dairy	9,556	9,824	14,254	13,213	14,269	11,178	12,525	15,427
Prepared meals	49,260	44,699	37,984	43,865	49,086	55,407	52,614	61,838
Sweet snacks	31,046	31,882	32,797	32,312	36,532	30,061	31,294	37,319
Yogurt	6,337	8,727	9,307	6,665	7,830	14,833	20,308	24,468
Restaurants	198,980	204,686	203,126	217,002	226,992	229,771	268,220	274,495
Fast food	152,915	151,693	149,563	157,319	161,110	162,811	190,502	195,122
Other restaurants	46,065	52,993	53,564	59,683	65,882	66,960	77,718	79,373
Total Food and Beverage	535,502	552,429	548,424	556,411	563,182	551,876	615,707	706,089

* Includes all packaged food and beverage product categories
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The Rudd Center for Food Policy and Obesity at Yale University seeks to improve the world's diet, prevent obesity, and reduce weight stigma by establishing connections between science and public policy.

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