

Creative techniques used to target children

A report of the findings of a content analysis study

**Research study conducted by The Communications
Research Group on behalf of Ofcom**

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Section 1

Executive Summary

- Two studies were conducted to look at the creative techniques used in promoting Core Category⁴⁰ products to children.
 - The first study analysed in detail current activity across the commercial terrestrial channels (children's airtime and 'adult' airtime) and a selection of dedicated children's channels.
 - The second study looked at the most watched commercials in 2003 and 2004 to investigate any changes in creative techniques.
- In order to investigate current activity, seven days of output across four terrestrial channels and four dedicated children's channels were sampled during 2005 to determine the extent and nature of spot advertising, programme sponsorship and programme promotion featuring Core Category products.
- Of the 12,839 adverts screened during the survey period 2,561 were for Core Category products. In addition to this, a further 242 programme sponsorship credits involved Core Category products; while a further 24 spots featured a programme promotion involving a Core Category sponsor.
- Sponsorship activity (credits and programme promotions) was seen only on ITV1 (80 cases), Channel 4 (33 cases), Five (94 cases) and Nickelodeon (59 cases). Therefore, 91% of all Core Category promotion (spot advertising, sponsorship, programme promotion) was represented in traditional commercial advertising spots.
- Core Category spot advertising occurred at an overall rate of 4.6 spots per hour. The rate of Core Category advertising on the dedicated children's channels (5.0 Core Category ads per hour) is higher than that on terrestrial children's programming (3.4 per hour).
- Core Category adverts were classified in various ways including the detailed Nielsen Media subcategories and were predominantly for Prepared Convenience Foods (26%), Confectionery (20%), Dairy Products (17%), Chain Restaurants (12%) and Soft Drinks (9%).
- All Core Category commercials recorded were examined in terms of any nutritional or health related claims made. Health claims were made in almost one half (45%) of adverts: 15% were scientific, 8% were casual, 8% were about the quality of the product and a further 15% were classified as 'other' including those which could be considered to be disclaimers such as 'eat as part of a balanced diet'.
- Examples of scientific claims included products such as *Birds Eye Ready Meals for Kids* with '*They're nutritionally balanced*' and *Yoplait Petit Filous* yoghurts which were described as having '*added calcium to help little bones grow stronger*'. Casual claims included '*with a taste this good, it's no wonder they eat all their vegetables*' (*Dolmio Chunky*) and quality claims included

⁴⁰ Core Category = Food, Soft Drinks and Chain Restaurants

advertises for *Walls Balls* where a child explains 'It's proper sausage in a crunchy coating'.

- Commercials within the *Cereals* category contained by far the largest number of health claims (93%) – 7% did not make any claim. Almost one in eleven (9%) made some health claim which had a nutritional or scientific theme. These included *Kelloggs Rice Krispies Multigrain* which advised 'Give them a cereal which is multigrain and contains a pro-biotic to encourage friendly bacteria to grow in their tummies'.
- *Cereals* along with *Chain Restaurants* predominated in those adverts which offered an incentive to purchase the advertised product. Tie-ins to other products or promotions were almost exclusively in the form of collectibles. The comparative study investigating any changes in creative execution over time highlighted two points.
 - The first was with regard to the promotion of gifts made available with *McDonalds Happy Meals* - although commercials in both years visually displayed the range of collectibles available, in 2003 voiceovers were used to promote them, specifically pointing out the number of collectibles in the range – this creative technique not observed in 2004.
 - The second change was linked to both the types of promotions featured and the setting of commercials for *Cereal* products. Although a range of free gifts were promoted, four out of the ten *Cereal* commercials analysed in 2004 promoted active pursuits amongst children. This was driven by the *Kellogg's Earn Your Stripes* campaign.
- One of the areas of interest when conducting the Content Analysis study was the use of celebrities and characters in Core Category advertising. In the case of advertising aimed at children, animated characters tend to be used more regularly than celebrities. As with tie-ins, these were more frequently encountered with *Cereals* and *Chain Restaurants* than with other Core Category products.
 - *Tony the Tiger* has been a familiar character promoting *Kellogg's Frosties* for many years as have *Snap, Crackle and Pop* for *Kellogg's Rice Krispies*. More recently *Coco the Monkey* has been successfully associated with *Kellogg's Coco Pops* and *Coco Pop Crunchers*.
 - In the case of *Chain Restaurants* there were no appearances of *Ronald McDonald*. Instead, characters associated with *McDonalds* were those directly linked to their product tie-ins such as *Sonic the Hedgehog* in the computer games giveaway.
- As may be expected, given the use of cartoon characters in the *Cereal* commercials analysed, these often used animated creative (47%). Although this is a popular format used in children's airtime, it is worth noting that animation was not found with *Confectionery* products where live action predominated.
 - In the analysis of 2005 activity, a log was also kept of whether the food product or product packaging was shown on screen. This revealed only 5 cases where the food product was not represented visually (0.2% of all Core Category products). The comparative study

found that the product changes developed by the *Chain Restaurants* such as the inclusion of fruit, milk or vegetables in children's meals were also being promoted on-screen in 2004 with the visual shots of the meals including these 'healthier' options.

Section 2

Objectives & methodology

Objectives

In 2004 Ofcom published the results of an extensive research study⁴¹ looking at the issue of food advertising to children in relation to childhood obesity.

The research consisted of a range of studies including viewing analysis, bespoke qualitative and quantitative research and a review of trends in eating habits. A piece of content analysis was also conducted to understand the creative techniques used by Core Category advertisers to promote their products in children's airtime as well as during the early evening slot.

This report sets out the results of a more comprehensive content analysis study conducted as a follow up to this original piece of research. The core objective of this study remains the same as the original piece– to understand the creative techniques used to promote Core Category products during children's airtime and 'adult' airtime. However this phase differs in the following ways:

- A wider range of channels have been analysed
- A greater level of detail has been recorded
- An investigation has taken place to establish whether there have been any changes in creative techniques between 2003 and 2004

In analysing the data presented in this report it is key to note that the study provides a snap-shot of activity at a given point in time – there may be variations in activity, which may for example be seasonal or associated with a particular product launch.

Sample and method

Two content analysis studies were conducted:

1. The first looked at advertising, sponsorship and promotional activity (2005) across a range of channels in order to establish in more detail the types of creative techniques used. Ofcom commissioned independent research agency, The Communications Research Group, to conduct this analysis.
2. The second study investigated any changes in creative techniques used between 2003 and 2004 – this was conducted internally by the Ofcom Market Research team.

1. Content Analysis- 2005 Activity

Seven days of output across four terrestrial channels and four dedicated children's channels were sampled to determine the extent and nature of commercial advertising (spot advertising), programme sponsorship and programme promotion featuring sponsorship undertaken by Core Category advertisers. The channels monitored were:

- ITV1
- GMTV
- Channel 4
- Five
- Boomerang

⁴¹ Childhood Obesity - Food Advertising in Context, July 2004

- Cartoon Network
- Nickelodeon
- Trouble

The sample was collected as a composite week spread over seven weeks (from 7th March 2005) such that for each channel, each day of the week was recorded in a different week. The dedicated children's channels of Boomerang, Cartoon Network, Nickelodeon and Trouble were recorded from appropriate start times (06:00, 05:00, 06:00 and 07:00 respectively) until 21:00. In the case of the terrestrial channels (ITV1, GMTV, Channel 4 and Five), the dedicated slots for children's programming were recorded as well as 'adult' airtime from 17:00 to 21:00. In total 558 hours of output were recorded and analysed. Analysis was conducted using pre-prepared coding frames which were used to record log the following data:

- Channel, date, time and length of transmission
- Classification of the activity as spot advertising, programme sponsorship or a programme promotion where the sponsor is also mentioned
- Classification of each Core Category advertisement into food categories
- Details of the Core Category product/brand
- Creative style including mood and setting, use of animation or video clips, etc.
- Inclusion of various claims including health and quality
- Use of celebrities or characters
- Promotion of product tie-ins

Two systems of product classification were used in the study. The first was primarily based on the 'Big 5' classification used by the Food Standards Agency (FSA) which covers *Cereals*, *Fast Food* (Chain Restaurants), *Confectionery*, *Savoury Snacks* and *Soft Drinks*. All other Core Category products logged during the course of the analysis were recorded as '*All other Core Category*' (see below).

The second classification system was based on the Nielsen Media (industry source for advertising activity data) product categorisation system. This database classifies products using a more detailed categorisation system (see Appendix 1 for details) and the basis of our categorisation is the Core Category definition used in the 2004 research study conducted by Ofcom. The definition of Core Category includes all food products and is created by combining the follow Nielsen categories:

- Food
- Soft Drink
- Chain Restaurants

In this study products were classified according to the sub-categories within the Core Category definition (e.g. *Bakery Goods*, *Confectionery*, *Dairy Products*, etc).

2. Creative Changes- 2003 vs. 2004

In order to investigate changes in creative techniques used by Core Category advertisers, advertising spots were sourced using two databases supplied by Nielsen Media. The Nielsen Media TV Monitor database was used to generate the data on the ten most watched advertisements during children's airtime in 2003 and 2004 across each of the following categories⁴²:

⁴² Categories defined by Nielsen Media.

- Cereals (Ready to eat + Requiring preparation)
- Chain Restaurants
- Confectionery
- Savoury Snacks (Potato Crisps & Snacks + Dips/Dipper Snacks)
- Soft Drinks
- All other Core Category sub-categories

The definition of the most watched advertisements was based on advertising impacts⁴³ amongst children aged 4-15. Children's airtime included the dedicated slots across the commercial terrestrial channels and all airtime on the dedicated children's channels.

The Creative Dynamix database was then used to source copies of the advertisements. It is important to note that these were sourced based on film numbers – a labelling method used in the advertising industry. It is therefore possible that the same advertiser or brand may be listed more than once as being in the top ten most watched as different campaigns may feature on the list.

In total 120 advertisements were analysed (see Appendix 2 for full list of commercials analysed) - similar information to that outlined above was recorded for each of the films.

This report details the findings of the Content Analysis study looking at the 2005 output and reports on any notable differences seen between advertising in 2003 and 2004 where relevant.

⁴³ Impacts provide a measure of advertising exposure – one impact is equivalent to one member of the target audience viewing one commercial spot.

Section 3

Overview of activity

Overall frequencies

In total 12,839 advertisements were recorded over the sample period (starting March 7th 2005). Of these, 2,561 were for Core Category products⁴⁴. Additionally, 242 programme sponsorship credits (Appendix 4) involving Core Category products and a further 24 spots with a programme promotion involving a Core Category sponsor (Appendix 5) were logged. Since all advertisements, programme sponsorships and programme promotions were counted, the above figures can be given as a proportion of the total in each category (Figure 1).

Figure 1

	Total Activity	Core Category Activity	Core Category Activity as a proportion of total activity- %
Spot advertising	12,839 spots	2,561 spots	20%
Sponsorship credits	3,161 credits	242 credits	8%
Programme promotion	526 credits	24 promotions	5%

Sponsorship activity (credits and programme promotions) was limited to ITV1 (80 cases), Channel 4 (33 cases), Five (94 cases) and Nickelodeon (59 cases). Thus, 91% of all Core Category promotion (spot advertising, sponsorship, programme promotion) was represented in traditional commercial advertising spots. The results presented throughout the remainder of the report refer to spot advertising activity.

Overall, there were 2,198 commercial breaks logged over the sample period with a combined duration of 7,494 minutes. Core Category advertisements totalled 1,011 minutes in duration and represented 13% of commercial airtime. While the duration of individual non-food commercials was not timed, given that Core Category adverts made up 20% of all commercials, these figures point to Core Category products being represented in somewhat shorter commercials than other products.

Figure 2 shows overall rates of advertising by channel. The highest rate of Core Category advertising was seen on Trouble (at 7.1 per hour, this was double that of the terrestrial channels) and such commercials accounted for almost one third (31%) of all adverts shown on this channel.

The average number of Core Category commercials per hour across all the dedicated children's channels (at 5.0 per hour) remains higher than that of the terrestrial channels (3.4 overall and during children's programming). In total 81% of all Core Category advertisements monitored across the sample were generated by the dedicated children's channels.

⁴⁴ Core Category = Food, Soft Drinks and Chain Restaurants

Figure 2: Overall rates of advertising

Channel	Number of Core Category ads	All ads per hour	Core Category ads per hour	% Core Category ads
Dedicated Children's Channels				
Boomerang	436	27.8	4.2	15
Cartoon Network	495	24.5	4.4	18
Nickelodeon	457	22.6	4.4	19
Trouble	698	23.2	7.1	31
Combined children's channels	2086	24.6	5.0	20
Terrestrial channels				
ITV1	194	20.5	4.7	23
GMTV	30	18.7	4.4	23
Channel 4	95	13.9	2.6	19
Five	156	19.5	2.9	15
Combined terrestrial channels	475	18.3	3.4	19
Combined adult terrestrial airtime	290	19.7	3.5	18
Combined children's terrestrial	185	16.1	3.4	21
Total Sample	2561	23.0	4.6	20

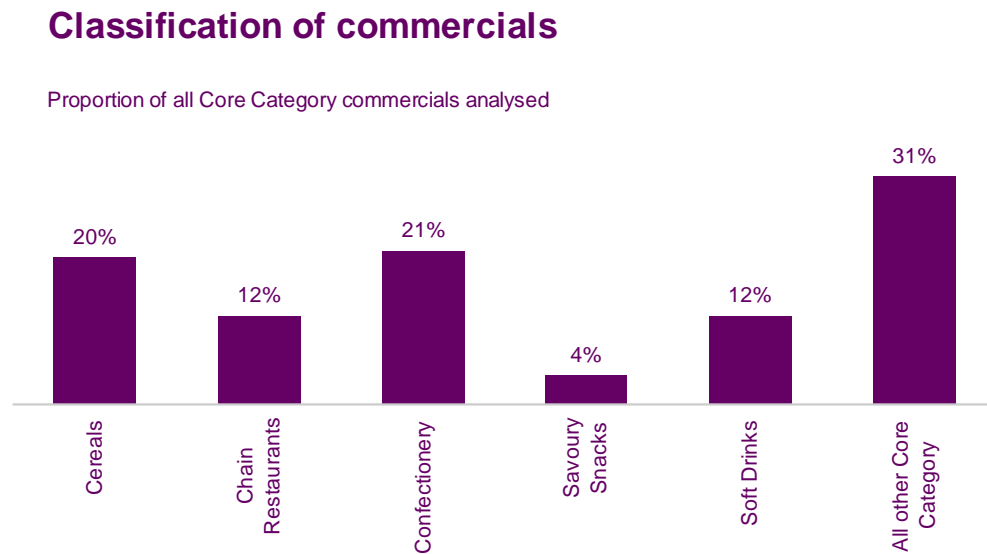
Source: Ofcom/CRG

These results illustrate that, over the sample period, the rate of Core Category advertising per hour on the dedicated children's channels (5.0 per hour) was 47% higher than that seen across the terrestrial channels during children's airtime (3.4 per hour). The rate of advertising on the terrestrial channels during 'adult' airtime (3.5 per hour) is almost the same as during children's airtime (3.4 per hour). It is important to note here that 185 Core Category commercials were logged during children's airtime on ITV1, Channel 4 and Five.

Type of Core Category product advertised

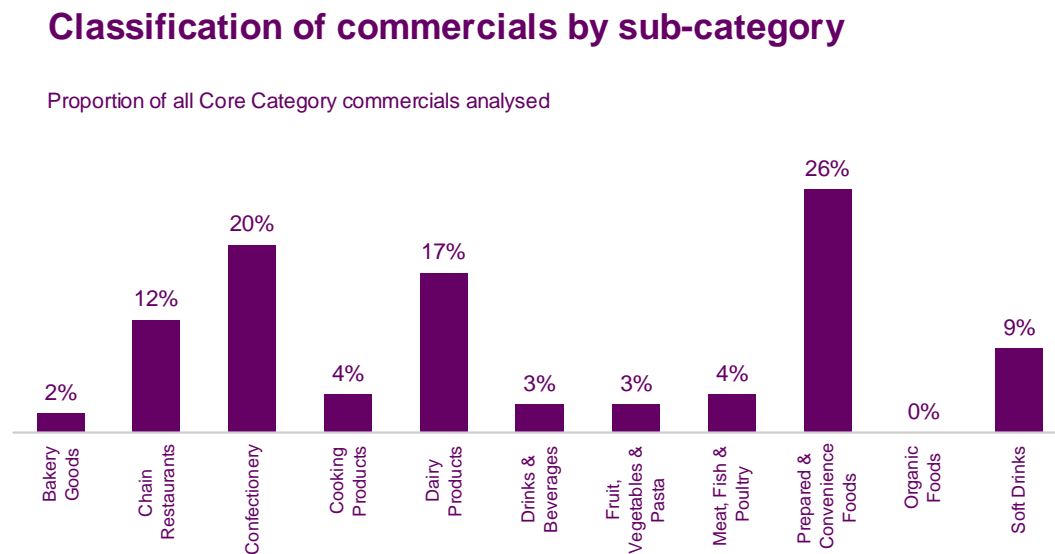
Figures 3a and 3b present details of the volume of Core Category commercials recorded during the sample period by category as defined in Section 2 of the report.

Figure 3a: Advertising activity by category



Source: CRG/Ofcom

Figure 3b: Advertising activity by sub category⁴⁵



Source: CRG/Ofcom

Few commercials (predominantly for supermarkets) included more than one type of food. In the main analyses below, a total of 2,586 different types of **Core Category products** were noted in 2,561 **adverts**.

⁴⁵ Note: *Prepared & Convenience Foods* includes *Cereals*. The proportion of spots classified as Soft Drinks moves from 12% in Figure 2a to 9% in Figure 2b. This is a result of the Nielsen sub-categories providing more detailed classification – products such as Crusha (milk flavouring) was classified as a Soft Drink in Figure 2a and as a Dairy product in Figure 2b.

Most frequent commercials

The eleven most frequently shown Core Category commercials (captured over the course of the sample period) accounted for 42% of all Core Category adverts captured in the sample. These are shown in Figure 4 below.

Figure 4: Most frequent commercials

Product	Total number of spots	Sub Category
Haribo Tangfastics / Starmix / Supermix	152	Confectionery
Toppo Crunchy Snake	141	Confectionery
Yoplait Petits Filous Frubes	132	Dairy Products
Kelloggs Coco Pops Crunchers	118	Prepared & Convenience Food
Capri Sun	106	Soft Drinks
McDonalds Happy Meal	97	Chain Restaurants
Kelloggs Frosties	85	Prepared & Convenience Food
Crusha	61	Dairy Products
Mini Babybel	60	Dairy Products
Kelloggs Frosties & Coco Pops	58	Prepared & Convenience Food
Nestlé Cookie Crisp	58	Prepared & Convenience Food

The two most frequently advertised products were both confectionery products and contributed one in nine (11%) of all Core Category adverts in the sample. Further details of the most frequently shown adverts for each category type are set out in Figures 5a – 5f below.

Figure 5a: Cereals

Product	Total number of spots
Kelloggs CoCo Pops Crunchers	118
Kelloggs Frosties	85
Kelloggs Frosties / CoCo Pops	58
Nestlé Cookie Crisps	58
Nestlé Golden Nuggets / Nesquik / Cookie Crisps	43
Nestlé Honey Nut Cheerios	24
Kelloggs Rice Krispies Multi Grain	23
Kelloggs Crunchy Nut Nutty	19
Kelloggs All Bran / Bran Flakes	16
Kelloggs Frosties / Rice Krispies / CoCo Pops / Cornflakes	9

Figure 5b: Chain Restaurants

Product	Total number of spots
McDonalds Happy Meal	97
McDonalds Fruit Jelly	48
Pizza Hut 4 for all	39
Burger King Freshly Baked Baguettes	35
Burger King	26
Kentucky Fried Chicken	24
Burger King Take 2 Meals	21
Burger King Robots Meal	15
Kentucky Ice Cream Bucket	13
McDonalds Salad Plus Menu	7

Figure 5c: Confectionery

Product	Total number of spots
Haribo Tangfastics / Starmix / Supermix	152
Topps Crunchy Snake	141
Masterfoods Mars Delight	35
Maoam Stripes	33
Nestlé Little Notions	20
Kelloggs Nutri Grain	18
Topps Juicy Drop Pop	16
Wrigleys Juicy Fruit Strappleberry	16
Walls Carte D'Or ice cream	14
Wrigleys Airwaves	13

Figure 5d: Savoury Snacks

Product	Total number of spots
Cheestrings	36
Hula Hoops	17
Walkers Crisps	12
Jacobs Essentials	10
Ryvita Minis	5
Pringles	4
Quavers	2
Quaker Crackers Seasons	2
Snack A Jacks	1

Figure 5e: Soft Drinks

Product	Total number of spots
Capri Sun	106
Crusha	55
Volvic Splash	48
Robinsons for Milk	15
Volvic Touch of Fruit	13
Robinsons Squash	11
Coca Cola	11
Volvic	11
Lucozade	10
Robinsons Fruit Shoot	10

Figure 5f: All other Core Category products

Product	Total number of spots
Yoplait Petits Filous Frubes	134
Mini Babybel	60
Birds Eye Ready Meals for Kids	52
Flora	44
Laughing Cow Cheez Dippers	43
McCain Potato Range	39
Walls Balls	38
Yoplait Petits Filous Yoghurts	37
Dolmio Sauces range	36
Danone Actimel	29

Core Category activity by channel type

The overall pattern of adverts is examined across the channels by using the wider six-category classification system as shown below. Channel comparisons using the Nielsen sub-categories can be found in Appendix 3. Analysis of the terrestrial channels is split into activity during ‘adult’ airtime and children’s airtime which refers to dedicated slots when children’s programming is shown.

Figure 6: Core Category commercials by channel
Proportion of Core Category products advertised by category

Product Categories	All channels %	Terrestrial-Adult airtime %	Terrestrial-Children’s airtime %	Boomerang %	Cartoon Network %	Nickelodeon %	Trouble %
Cereals	20	14	20	34	35	16	6
Chain	12	8	20	12	13	14	8
Restaurants							
Confectionery	21	12	13	14	15	20	34
Savoury Snacks	4	10	5	3	2	2	5
Soft Drinks	12	6	15	3	5	17	23
All other Core Category	31	49	26	34	31	31	24
Total Core Category	100%	100%	100%	100%	100%	100%	100%
Base: Total number of product types	2586	293	186	436	495	457	719

N.B. Some adverts contained more than one type of Core Category product.

There are notable variations in product types across the channels. Boomerang and Cartoon Network were distinctive in the relatively high proportion of *Cereal* advertising shown (notably *Nestlé Cookie Crisps* and *Golden Nuggets*). *Soft Drinks* were particularly frequent on both Nickelodeon and Trouble. The highest proportion of *Confectionery* was seen on Trouble - these included *Masterfood’s Mars*, *Topps Crunchy Snake*, *Wrigley’s Juicy Fruit Strappleberry* and the *Haribo* range (*Tangfastics*, *Starmix* and *Supermix*).

Savoury Snacks were relatively infrequent and this was particularly true of Boomerang, Cartoon Network and Nickelodeon. The highest proportion of these products on any channel appeared in adult airtime on the terrestrial channels, followed by terrestrial children’s airtime and Trouble.

Activity during adult airtime on the terrestrial channels was distinguished by the high proportion of other *Core Category* product advertising (predominantly *Prepared & Convenience Foods*) which comprised one half (49%) of all Core Category adverts. Here the diversity of products is notable. In addition to ready meal products such as *Wall’s Balls*, *McCain Potato Range* and *Birds Eye Ready Meals for Kids*, terrestrial adult airtime was distinctive in the frequency of butter (e.g. *Lurpak*, *Kerrygold*), tomato ketchup and brown sauces (e.g. *Heinz*, *HP*) and various cooking sauces (e.g. *Dolmio*).

Children’s airtime on terrestrial channels carried proportionately fewer adverts for other *Core Category* products than most of the dedicated children’s channels and far fewer than terrestrial adult airtime. It is important to point out that the sample size

here is small, representing only 49 cases. Children's airtime on the terrestrial channels also appears to be distinctive in the high proportion of adverts for *Chain Restaurants*. At 20%, it appears more frequently than during adult airtime and the dedicated children's channels. This percentage has a base of 186 Core Category products and represents 38 cases.

Section 4

Creative techniques

Overview of findings

Core Category commercials were monitored to record the following differences across sub-categories and airtime (children's vs. adult and different dedicated children's channels):

- Use of health claims
- Product tie-ins offered
- Celebrity or character association
- Style, mood and setting of commercials

Health Claims

- *Cereal* products were the most likely to use health claims, with 93% of these adverts featuring claims such as '*give them a cereal which is multigrain and contains a pro-biotic to encourage friendly bacteria to grow in their tummies*'.
- The *Chain Restaurants* were most likely to feature a quality claim such as '*packed with fresh ingredients*'.
- On the terrestrial channels, commercials aired during adult airtime were more likely to include scientific, casual or quality claims (37% of all Core Category adverts in adult airtime) compared with children's airtime (19% of all Core Category adverts in children's airtime). However commercials during children's airtime were more likely to carry other types of claims such as '*enjoy as part of a balance diet*' or '*run around, have fun, eat a balanced diet*'.
- The use of health claims varied across the dedicated children's channels – this was driven by the types of products most likely to advertise on those channels. The relatively high frequency of *Cereal* commercials on Boomerang and Cartoon Network resulted in a higher frequency of commercials featuring health claims on these channels.

Product tie-ins

- *Cereal* advertisers (28% of *Cereal* spots) and *Chain Restaurants* (53% of *Chain Restaurant* adverts) predominated in those commercials offering product tie-ins – which tended to take the form of collectibles.
- Core Category commercials during children's airtime on the terrestrial channels were more likely to feature a product tie-in (25% of all Core Category adverts during children's airtime) compared with adult airtime (7% of all Core Category adverts during terrestrial adult airtime).
- Again, as a result of the products advertised, there were variations across the dedicated children's channels – 4% of adverts on Trouble featured a product tie-in compared with 19% of commercials on Boomerang.

Celebrity or character association

- Overall, commercials for *Cereals* (64% of all *Cereal* adverts) and *Chain Restaurants* (38% of *Chain Restaurant* spots) were most likely to feature celebrities or characters.
- Similar proportions (around seven in ten commercials) of adverts during both children's airtime and adult airtime on the terrestrial channels featured celebrities or characters. However Core Category spots during children's airtime were more likely to feature characters (27%) whereas spots during adult airtime were more likely to include celebrities (17%).

- Again, trends across the dedicated channels were skewed by category trends with Core Category commercials on Cartoon Network (42% of Core Category spots) and Boomerang (44% of Core Category spots) most likely to feature celebrities or characters.

Style, mood and setting of commercials

- Although the use of animation varies across sub-categories, there is a clear bias towards the use of this creative technique in Core Category advertising during children's airtime.
- Across the terrestrial channels, 25% of Core Category commercials during children's airtime used animation – compared with 10% of Core Category commercials during adult airtime. 30% of all Core Category commercials monitored on the dedicated children's channels used animation.

Health claims

All Core Category commercials recorded were examined in terms of any nutritional or health related claims made. Almost one half (45%) made some such claim and these were categorised as shown in Figure 7.

Figure 7: Health claims by category
Proportion of products making health claims by claim-type

	Total	Cereals	Chain Restaurants	Confectionery	Savoury Snacks	Soft Drinks	Other Core Category
	%	%	%	%	%	%	%
Scientific claims	15	9	--	2	17	34	23
Casual claims	8	7	2	--	3	24	9
Quality claims	8	8	27	--	--	1	9
Other claims	15	69	*	--	--	*	5
No claims	55	7	70	98	80	40	54
Total Category	100%	100%	100%	100%	100%	100%	100%
Base: Total number of product types	2586	516	302	533	105	319	811

NB: * represents percentages of less than 0.5%

Some adverts contained more than one type of Core Category product.

The Core Category products least likely to make any health claims were *Confectionery* products. The small number of cases (2%) detected in this category are due to *Oral B Brush Away* (a chewing gum) which made the scientific claim 'clinically proven to remove plaque'.

Scientific claims were particularly associated with *Prepared & Convenience Foods* classified as 'other Core Category'. *Birds Eye Ready Meals for Kids* contributed 52 cases with the claim, 'They're nutritionally balanced'. *Flora* contributed 44 cases with the claim that it was 'rich in healthy oils such as omega 3 and 6'. *Yoplait Petit Filous* yoghurts were described as having 'added calcium to help little bones grow stronger' (representing a further 37 cases). *Danone Actimel* with 29 adverts claimed that 'only Actimel contains the good bacteria LC immunitass'. These four adverts accounted for almost nine out of ten (87%) scientific claims for other *Core Category* products. It should be noted that while nearly one quarter (23%) of other *Core Category* food adverts made scientific claims, the majority (54%) made none at all.

In categorising claims, a distinction was made between casual claims such as ‘*with a taste this good, it’s no wonder they eat all their vegetables*’ (*Dolmio Chunky*) and quality claims such as ‘*white bread with all the wheatgerm goodness of wholemeal*’ (*Hovis Best of Both*). These occurred with equal frequency for other *Core Category* products at 9% each. Over one half (53%) of the quality claims for such foods were for *Walls Balls* where a child explains ‘*It’s proper sausage in a crunchy coating*’.

Scientific claims were frequent for *Soft Drinks* (at 34% of cases) and these were all for *Capri Sun* which was said to be ‘*free from artificial colourings and preservatives*’ according to the caption.

Quality claims made by *Chain Restaurant* advertisers (27%) were skewed by *Burger King’s Fresh Baked Baguettes* campaign which advised that the product was ‘*packed with fresh ingredients*’ and *McDonald’s Fruit Jelly* which is described as being ‘*made from 99% real fruit juice*’.

While *Savoury Snack* commercials were relatively infrequent, just over one in six (17%) involved some scientific claim. One third of these were found in adverts for *Walkers Crisps* where it was said that the new variety ‘*contains 30% less fat than they used to*’.

Commercials within the *Cereals* category contained by far the largest number of health claims (93%) – 7% did not make any claim. One in eleven made some health claim which had a nutritional or scientific theme. These included *Kelloggs Rice Krispies Multigrain* which advised ‘*Give them a cereal which is multigrain and contains a pro-biotic to encourage friendly bacteria to grow in their tummies*’. Another was that of *Nestlé Shredded Wheat* and *Bitesize Shredded Wheat* which made reference to ‘*lower cholesterol*’. Adverts for *Cereals* within the *Kellogg’s* range featured a GDA (Guideline Daily Amounts).

The GDA concept contrasts with most other claims for *Cereals* which appeared more as disclaimers than claims. Almost seven out of ten (69%) of these food products contained some other health related claim. These included imperatives, usually as captions, to ‘*enjoy as part of a balanced diet*’ (*Nestlé Cookie Crisp*) or to ‘*eat as part of a balanced breakfast*’ (*Nestlé Golden Nuggets*). Similar references were made for *Kellogg’s* brands such as ‘*eat Frosties as part of a balanced breakfast*’ or ‘*run around, have fun, eat a balanced diet*’ (*Coco Pop Crunchers*). Again these were offered in the form of small captions.

Figures 8a and 8b provide a breakdown of health claims by channel. As noted earlier, terrestrial children’s airtime represents a small sample. Nonetheless, the pattern where almost one fifth of *Core Category* adverts showed ‘other claims’ is as expected, given the predominance of *Cereal* commercials which made up one fifth of *Core Category* adverts here. Similarly, the low frequency of adverts for *Cereals* on the channels *Trouble* and *Nickelodeon* is associated with a low frequency of these ‘other claims’.

Scientific claims were more common on *Trouble* and *Cartoon Network*. In the case of *Trouble*, these were mainly due to two adverts (*Capri Sun* and *Crusha*) – the *Prepared & Convenience* product *Danone Actimel* also contributed to these figures. *Cartoon Network* achieved its relatively high proportion of scientific claims due to *Prepared & Convenience* foods (such as *Birds Eye*) within the ‘other *Core Category*’ group which claimed to be nutritionally balanced and *Cereals* which included GDA (Guideline Daily Amount).

Table 8a: Health claims: Terrestrial channels

Proportion of Core Category products making health claims by type of airtime

	Children's airtime	Adult airtime	Total
	%	%	%
Scientific claims	8	16	13
Casual claims	4	11	8
Quality claims	7	10	9
Other claims	19	4	10
No claims	61	59	60
<i>Base: Total number of spots</i>	185	290	475

Comparison of activity during children's airtime and adult airtime on terrestrial channels shows that although a similar proportion of commercials carried health claims, the types of claims varied. Commercials during adult airtime were more likely to make scientific or casual health claims whereas advertisements during children's airtime were more likely to carry other types of claims, such as those featured in cereal adverts (see above).

Table 8b: Health claims: Dedicated children's channels

Proportion of Core Category products making health claims by channel

	Cartoon Network	Nickelodeon	Trouble	Boomerang	Total
	%	%	%	%	%
Scientific claims	16	6	22	11	15
Casual claims	4	11	7	8	8
Quality claims	8	5	6	12	7
Other claims	28	14	3	27	17
No claims	43	63	62	42	53
<i>Base: Total number of spots</i>	495	457	698	436	2086

Product tie-ins

Overall, there were 2561 adverts which included 2586 different types of Core Category products – some adverts contained more than one product tie-in. Of these different product types, 14% included some tie-in. *Cereals* along with *Chain Restaurants* predominated in those adverts which offered an incentive to purchase the advertised product. Tie-ins to other products or promotions were almost exclusively in the form of collectibles as detailed in Figure 9.

Figure 9: Tie-ins by category

Proportion of products offering product tie-ins

	Free Gift	Collectibles	Other Tie	Price Cut	Multi-buy	Product Link	Other Promo	No Tie-in	Total Category	Base No. of products
	%	%	%	%	%	%	%	%	%	
Cereals	2	22	2	--	--	*	3	72	100%	516
Chain Restaurants	--	52	--	*	*	--	*	47	100%	302
Confectionery	--	--	*	--	1	--	4	95	100%	533
Savoury snacks	--	--	2	--	--	--	2	96	100%	105
Soft Drinks	--	--	--	--	*	--	--	100	100%	319
Other Core Category	--	--	--	*	*	1	1	97	100%	815
Total product types	*	11	*	*	*	*	2	86	100%	2590

NB: * represents percentages of less than 0.5%

Some adverts contained more than one type of Core Category product. Some spots had more than one tie-in

Historically, cereals have been associated with collectible items such as miniature models to be found inside the packet and this tradition continues. *Nestlé Golden Nuggets/Nesquik/Cookie Crisp* offered free *Lego Knights* while *Kellogg's Frosties/Coco Pops* were offering free figures from the film *The Robots*. It is worth adding that, while relatively infrequent, the *Kellogg's Special K* cereal offered a yoga DVD.

Over the sample period, there were a number of collectibles available from the *Chain Restaurants*. *McDonalds Happy Meals* appealed to traditional gender stereotypes by offering both *My Little Pony* and *Transformers* toy figures which were later followed by a new campaign featuring computer games (*Sega*). As with *Kellogg's*, *Burger King* also gave away miniature models from *The Robots* film.

As Figures 10a and 10b reveal, children's airtime on the terrestrial channels achieved the highest proportion of tie-ins. This is partly due to the channels carrying a greater volume of *Chain Restaurant* advertising than other channels, although *Cereals* were also a major source.

Figure 10a: Tie-ins: Terrestrial channels

Proportion of Core Category products offering product tie-ins by type of airtime

	Children's airtime	Adult airtime	Total
	%	%	%
Free gift	1	1	1
Collectibles	19	--	8
Other tie-in	--	1	1
Price cut	1	1	1
Multi buy	1	1	1
Product link	2	1	1
Other promo	1	1	1
No tie-in	75	93	86
Total number of spots	186	293	479

NB: Some spots had more than one tie-in

Core Category products were noticeably less likely to carry commercials promoting product tie-ins during 'adult' airtime on the terrestrial channels compared with children's airtime.

Figure 10b: Tie-ins: Dedicated children's channels

Proportion of Core Category products offering product tie-ins by channel

	Cartoon Network	Nickelodeon	Trouble	Boomerang	Total
	%	%	%	%	%
Free gift	--	--	*	--	*
Collectibles	19	16	2	14	11
Other tie-in	1	1	--	--	*
Price cut	--	--	--	--	--
Multi buy	--	--	1	--	*
Product link	--	--	--	--	--
Other promo	2	--	2	6	2
No tie-in	78	83	96	81	86
Total number of spots	495	457	698	436	2086

NB: * represents percentages of less than 0.5%

The comparative study investigating any changes in creative execution between 2003 and 2004 found similar trends in the use of product tie-ins amongst *Chain Restaurants* and *Cereal* advertisers. However two key changes were seen over the years.

- The first change was with regards to the commercials promoting *McDonalds Happy Meals* which all tend to feature the promotional item currently available in-store with each meal. Although commercials in both years visually displayed the range of collectibles available, in 2004 (compared with 2003), there was a clear omission of the **number of collectibles** in the current range being promoted in a voiceover.
- The second change was linked to both the types of promotions featured and the setting of commercials for *Cereal* products. Although a range of free gifts were promoted, four out of the ten *Cereal* commercials in 2004 promoted active pursuits amongst children. This was driven by the *Kellogg's Earn Your Stripes* campaign which featured gifts such as wall charts to help develop football skills as part of the *Frosties Football Challenge*. The *Sugar Puffs* campaign offered children free swimming sessions at their local pool. These commercials were often set in active locations showing children taking part in swimming, canoeing, football, etc.

Celebrity association

One of the areas of interest when conducting the Content Analysis study was the use of celebrities and characters in Core Category advertising. In the case of advertising aimed at children, animated characters tend to be used more regularly than celebrities. As with tie-ins, these were more frequently encountered with *Cereals* and *Chain Restaurants* than with other Core Category products as shown in Figure 11.

Figure 11: Use of celebrities and characters by category

Proportion of product commercials using celebrities and characters

	Celebrities	Characters	No Features	Total Category	Base
	%	%	%	%	No. of products
Cereals	5	59	36	100%	516
Chain Restaurants	2	36	62	100%	302
Confectionery	--	5	95	100%	533
Savoury Snacks	21	10	70	100%	105
Soft Drinks	2	16	82	100%	319
Other Core Category	11	25	64	100%	811
Total	6	27	67	100%	2586

NB: Some adverts contained more than one type of Core Category product.

Tony the Tiger has been a familiar character promoting *Kellogg's Frosties* for many years as have *Snap, Crackle and Pop* for *Kellogg's Rice Krispies*. More recently *Coco the Monkey* has been successfully associated with *Kellogg's Coco Pops* and *Coco Pop Crunchers*.

In the case of *Chain Restaurants* there were no appearances of *Ronald McDonald*. Instead, characters associated with *McDonalds* were those directly linked to their product tie-ins such as *Sonic the Hedgehog* in the computer games giveaway.

As may be noted in Figure 11, the *Cereal* adverts did not use characters exclusively. Among the 5% to include celebrities were *Kellogg's All Bran* and *Bran Flakes* featuring *William Shatner* in a comic role.

The advertising of products categorised in the 'other Core Category' group which featured celebrities occurred most often in the context of adverts for supermarkets including food items. Celebrities noted here included *Sharon Osbourne (Asda)*, as well as *Jimmy Nail, Martin Clunes* and *Timothy Spall (Tesco)*.

Although the largest proportion of Core Category adverts to feature celebrities is that of *Savoury Snacks*, these products were relatively infrequent in this sample. Celebrity usage here is predominantly associated with *Walkers Crisps* commercials which feature *Gary Lineker* and *Tara Palmer-Tomkinson (Walkers Sensations)*.

As noted earlier, characters are very much associated with *Cereals* and so the pattern across channels is as expected. Boomerang and Cartoon Network carried the most such advertising followed by Nickelodeon and children's terrestrial, with Trouble the least likely to carry such food products. This pattern is also seen in the use of characters as shown in Figures 12a and 12b.

Figure 12a: Use of celebrities and characters: Terrestrial channels

Proportion of Core Category commercials using celebrities and characters by type of airtime

	Children's airtime %	Adult airtime %	Total %
Celebrities	4	17	12
Characters	27	13	19
No features	69	70	69
Base: Number of spots	185	290	475

As Figure 12a shows, similar proportions of advertisements on the terrestrial channels during the two dayparts feature celebrities or characters. However, commercials during children's airtime are more likely to feature characters than those during adult airtime which are more likely to feature celebrities.

Figure 12b: Use of celebrities and characters on dedicated children's channels

Proportion of Core Category commercials using celebrities and characters by channel

	Cartoon Network %	Nickelodeon %	Trouble %	Boomerang %	Total %
Celebrities	1	--	10	--	4
Characters	41	34	10	44	30
No features	58	66	80	56	67
Base: Number of spots	495	457	698	436	2086

The comparative study also found similar trends in the use of characters and celebrities during children's airtime with few examples featuring celebrities and most being associated with 'brand characters' or linked to promotional tie-ins.

Style & mood

Style of adverts

As may be expected given the use of cartoon characters in the *Cereal* commercials analysed, these showed a high proportion of animated adverts (47%). The largest proportion of adverts using animation was found within *Soft Drinks* where the majority were due to the two brands *Capri Sun* and *Crusha*.

Figure 13: Advert style by category
Advertising style used as a proportion of product commercials

	Animation	Stills	Live Action	Music Video Clips	Combination	Total Category	Total
	%	%	%	%	%	%	No. of products
Cereals	47	2	24	--	27	100%	516
Chain Restaurants	--	3	28	--	68	100%	302
Confectionery	--	1	94	--	5	100%	533
Savoury Snacks	10	8	83	--	--	100%	105
Soft Drinks	78	3	19	--	1	100%	319
Other Core Category	24	4	71	--	*	100%	811
All products	27	3	56	--	15	100%	2586

NB: * represents percentages of less than 0.5%

Some adverts contained more than one type of Core Category product.

Although animation is a popular format used in children's airtime (Figures 14a and 14b), it is worth noting that this was not found with *Confectionery* products where live action predominated. Figure 14a highlights the difference in techniques used between children's airtime and adult airtime. There is a clear bias towards the use of animation or a combination of animation and live action (for example) when targeting children.

Figure 14a: Advert style: Terrestrial channels
Advertising style used as a proportion of Core Category activity by type of airtime

	Children's airtime	Adult airtime	Total
	%	%	%
Animation	25	10	16
Stills	1	4	3
Live Action	50	83	70
Music Video Clips	--	--	--
Combination	24	3	11
Base: Total number of spots	185	290	475

Figure 14b: Advert style: Dedicated children's channels

Advertising style used as a proportion of Core Category activity by channel

	Cartoon Network	Nickelodeon	Trouble	Boomerang	Total
	%	%	%	%	%
Animation	35	40	20	30	30
Stills	--	--	5	--	2
Live Action	48	41	71	42	53
Music Video Clips	--	--	--	--	--
Combination	18	19	4	28	15
Base: Total spots	495	457	698	436	2086

As observed elsewhere, Trouble has an older audience profile than the other dedicated children's channels and contains fewer adverts with animation.

The comparative study found similar trends in children's airtime with *Cereal* advertisers making greater use of animated creative, which was associated with the characters used by many brands. *Chain Restaurant* advertising was biased towards live action with many adverts being set in restaurants (often showing children playing with the promotional gifts) as well as the use of video clips (again linked to promotional activity).

In the analysis of 2005 activity, a log was also kept of whether visuals of the Core Category products or product packaging were shown on screen. This revealed only 5 cases where the food product was not represented visually (0.2% of all Core Category products). The comparative study found that the product changes developed by the *Chain Restaurants* such as the inclusion of fruit, milk or vegetables in children's meal were also being promoted on-screen in 2004 with the visual shots of the meals including these 'healthier' options.

Mood of adverts

Although it might be suspected that comedy would pre-dominate in adverts aimed at children, those classified as comic were among the minority, as seen in Figure 15. However, humour was evident in the large number classified as light-hearted.

Figure 15: Mood of adverts by category

Mood setting as a proportion of product commercials

	Serious	Light	Comic	Quirky	Total Category	Base
	%	%	%	%	%	No. of products
Cereals	42	55	3	--	100%	516
Chain Restaurants	53	42	5	--	100%	302
Confectionery	39	28	33	--	100%	533
Savoury Snacks	4	86	10	--	100%	105
Soft Drinks	13	67	1	19	100%	319
Other Core Category	40	51	8	--	100%	811
Total	37	50	11	2	100%	2586

NB: Some adverts contained more than one type of Core Category product.

In the case of *Confectionery*, one third were comic and, of these, almost nine out of ten were for *Haribo* varieties where kids and adults reverse roles and the former become sensible, reprimanding the adults for their unruly behaviour. The category 'quirky' was also rarely observed and almost all instances here were due to the *Soft Drink, Crusha*.

Fantasy settings in order to entertain the audience were also infrequent. In the case of *Cereals*, the figure for fantasy setting was driven by *Kellogg's Frosties* and *Coco Pops*. These promoted *The Robots* tie-in to show characters in a spaceship and in one other *Kellogg's* series *Tony the Tiger* and *Coco the Monkey* were located in a *Star Wars* set.

As Figures 16a and 16b reveal, the various channel types have broadly similar profiles.

Table 16a: Mood of adverts: Terrestrial channels

Mood setting as a proportion of Core Category activity by type of airtime

	Children's airtime	Adult airtime	Total
	%	%	%
Serious	39	35	36
Light-hearted	50	57	54
Comic	6	8	8
Quirky	5	*	2
Base: Total number of spots	185	290	475

NB: * represents percentages of less than 0.5%

Table 16b: Mood of advert: Dedicated children's channels

Mood setting as a proportion of Core Category activity by channel

	Cartoon Network	Nickelodeon	Trouble	Boomerang	Total
	%	%	%	%	%
Serious	42	40	27	43	37
Light-hearted	42	44	56	48	49
Comic	14	12	15	6	12
Quirky	2	4	2	2	2
Base: Total number of spots	495	457	698	436	2086

Setting of adverts

In order to gain a more complete picture of the type of creative used to promote Core Category products to children, the final coding dimension was the setting of the advert. Overall, school settings were rare compared with images of young people enjoying themselves outdoors or in domestic situations.

Figure 17: Setting of adverts by category

Setting of adverts as a proportion of product commercials

	Domestic	Outdoor	School	Fantasy	Other	Total Category	Base
	%	%	%	%	%	%	No. of products
Cereals	14	47	--	19	20	100%	516
Chain Restaurants	6	3	--	*	91	100%	302
Confectionery	27	22	--	--	50	100%	533
Savoury snacks	10	35	5	--	50	100%	105
Soft Drinks	4	34	4	15	43	100%	319
Other Core Category	32	38	*	5	25	100%	811
All product types	20	32	1	7	40	100%	2586

NB: * represents percentages of less than 0.5%

Some adverts contained more than one type of Core Category product.

One notable feature is the high proportion of 'other' settings under *Chain Restaurants*. These are largely due to *McDonalds Happy Meal* adverts which combined the restaurant setting with others such as Disneyland in Paris. It is also worth noting that while few adverts exclusively located the setting in school, those for

Capri Sun (Soft Drink) combined this setting with others such as the school bus. Outdoor settings were a particular feature of children’s airtime as shown below.

Figure 18a: Setting of adverts by airtime: Terrestrial channels
 Setting of adverts as a proportion of Core Category activity by type of airtime

	Children’s airtime	Adult airtime	Total
	%	%	%
Domestic	18	26	23
Outdoor	40	21	28
School	1	1	1
Fantasy	7	--	3
Other	35	53	46
<i>Base: Total number of spots</i>	185	290	475

The difference between adverts in children’s terrestrial airtime compared with adult airtime is notable with twice as many set outdoors in children’s airtime. As observed elsewhere, Trouble has a different profile to the other dedicated children’s channels with far fewer adverts in an outdoor setting.

Figure 18b: Setting of advert on dedicated children’s channels
 Setting of adverts as a proportion of Core Category activity by channel

	Cartoon Network	Nickelodeon	Trouble	Boomerang	Total
	%	%	%	%	%
Domestic	19	12	26	19	20
Outdoor	36	45	15	45	33
School	--	--	2	--	1
Fantasy	13	12	--	13	8
Other	33	31	57	23	38
<i>Base: Total number of spots</i>	495	457	698	436	2086

Appendix 1

Category definition

In the 2004 report published by Ofcom, *Childhood Obesity – Food Advertising in Context*, analysis of advertising spend and exposure was based on data provided by Nielsen Media.

Based on the categorisation used by Nielsen Media it was decided the most appropriate definition to use in order to measure activity across food and drink advertisers was that of *Core Categories*. This is defined as all food, soft drink and chain restaurant advertising. This group of categories is broader than that used by a number of organisations primarily due to the way in which the data is classified.

Products are not always classified as one would expect. For example, *Kraft Dairylea Dunkers* is classified under the *Dairy Products & Substitutes/Cheese* sub-sector rather than under the *Prepared & Convenience Foods/Dipper Snacks* category. And instead of finding home-cook chips in the *Prepared & Convenience* category, these brands are classified under the *Frozen Vegetables* sub-sector of the *Fruit, Vegetables, Pasta* category. Our decision was therefore to adopt an inclusive approach. *Core Category* foods cover all food and drink, including the category which our research identified as important, *Prepared & Convenience Foods* (e.g. convenience desserts, canned ready-to-eat, pizza, frozen ready-to-eat meals). The 'Big 5' classification also excludes products such as *Cakes* and *Biscuits*.

Nielsen categories

02 FOOD	02 FOOD (cont)
02.01 BAKERY GOODS	02.07 MEAT, FISH & POULTRY
02.01.05 BISCUITS	02.07.05 BACON
02.01.10 BREAD & BAKERIES	02.07.10 FISH(CANNED)
02.01.15 CAKES & FRUIT PIES	02.07.15 FISH(FRESH & FROZEN)
02.01.20 CAKES (FROZEN)	02.07.20 SLICE MEAT,MEAT/FISH SPRD,PATE
02.01.25 CRISPBREAD/CRACKERS	02.07.25 MEAT & POULTRY(CANNED)
02.01.91 BAKERY GOODS GENL	02.07.30 MEAT(FRESH & FROZEN)
02.02 CONFECTIONERY	02.07.35 MEAT PIES & SAUSAGES
02.02.05 CEREAL BARS	02.07.40 POULTRY(FRESH & FROZEN)
02.02.10 CHEWING GUM	02.08 PREPARED & CONVENIENCE FOODS
02.02.15 CHOCOLATE-BARS & COUNTLINES	02.08.05 BABY FOODS
02.02.20 CHOCOLATE-BOXED	02.08.10 CEREALS(READY TO EAT)
02.02.25 CHOCOLATE-OTHER	02.08.15 CEREALS(REQUIRING PREPARATION)
02.02.30 ICE CREAM & LOLLIES	02.08.20 CONVENIENCE DESSERTS
02.02.35 SUGAR CONFECTIONERY	02.08.25 DEHYDRATED,CANNED READY TO EAT
02.02.40 MIXED/GENERAL CONFECTIONERY	02.08.26 PIZZA - FRESH
02.02.91 CONFECTIONERY GENL	02.08.27 PIZZA - FROZEN
02.03 COOKING PRODUCTS & SEASONING	02.08.30 PREPARED FOOD RANGE
02.03.05 CAKES & PASTRY MIXES	02.08.35 FROZEN READY TO EAT MEALS
02.03.10 CONDIMENTS	02.08.40 JAM & SPREADS
02.03.15 COOKING FATS	02.08.45 SOUP (CANNED)
02.03.20 FLOUR & BAKING POWDER	02.08.50 SOUP (PACKET) DRY & FRESH
02.03.25 MEAT & VEGETABLE EXTRACTS	02.08.55 POTATO CRISPS & SNACKS
02.03.30 SAUCES (COOKING & MIXES)	02.08.56 DIPS/DIPPERS SNACKS
02.03.35 SAUCES	02.08.91 PREPARED/CONVENIENCE FOOD GENL
02.03.40 SWEET TOPPINGS	02.09 ORGANIC FOODS RGE
02.03.45 SUGARS	02.09.05 ORGANIC FOODS
02.03.46 ARTIFICIAL SWEETENERS	
02.04 DAIRY PRODUCTS & SUBSTITUTES	
02.04.05 BUTTER	
02.04.10 CHEESE	
02.04.15 CREAM & SUBSTITUTES	04 DRINK
02.04.20 EGGS	04.02 SOFT DRINKS
02.04.25 MARGARINE	04.02.05 SOFT DRINK MIXER
02.04.30 MILK & MILK PRODUCTS	04.02.07 MINERAL WATER
02.04.35 YOGHURT/FROMAGE FRAIS	04.02.10 CORDIALS
02.04.99 DAIRY RANGE	04.02.15 FRUIT JUICES/STILL FRUIT DRINK
02.05 DRINKS & BEVERAGES	04.02.20 OTHER CARBONATED
02.05.05 COFFEE(FRESH)	04.02.95 SOFT DRINKS GENL
02.05.10 COFFEE(INSTANT)	
02.05.15 HEALTH DRINKS	
02.05.20 TEA	
02.05.25 OTHER DRINKS	
02.06 FRUIT, VEGETABLES, PASTA	
02.06.05 FRUIT(CANNED)	30 RETAIL
02.06.10 FRUIT(DRIED)	30.01 ENTERTAINMENT & LEISURE
02.06.15 FRUIT(FRESH)	30.01.15 CHAIN RESTAURANTS/ FAST FOOD
02.06.20 FRUIT(FROZEN)	
02.06.25 RICE & PASTA(DRIED & FRESH)	
02.06.30 VEGETABLES & PASTA (CANNED)	
02.06.35 VEGETABLES(FRESH)	
02.06.40 VEGETABLES(FROZEN)	

Appendix 2

Content Analysis, 2003 vs. 2004: Advertisements analysed

Cereals

2003		
	Brand	Impacts
1	Kelloggs Cocopops	94m
2	Kelloggs Frosties	93m
3	Kelloggs Honey Nut Cheerios	84m
4	Kelloggs Cocopops Crunchers	84m
5	Nestle Cookie Crisp	75m
6	Nestle Golden Nuggets	64m
7	Kelloggs Frosties	64m
8	Kelloggs Cocopops	63m
9	Kelloggs Frosties	62m
10	Kelloggs Frosties	57m

2004		
	Brand	Impacts
1	Kelloggs Cocopops	93m
2	Kelloggs Hunny B's	92m
3	Kelloggs Frosties	78m
4	Kelloggs Frosties	68m
5	Quaker HM's Crunchy	55m
6	Kelloggs Frosties	54m
7	Kelloggs Cocopops	53m
8	Kelloggs Cocopops	53m
9	Quaker Sugar Puffs	51m
10	Kelloggs Frosties + Cocopops	50m

Chain Restaurants

2003		
	Brand	Impacts
1	McDonalds Happy Meal	57m
2	McDonalds Happy Meal	29m
3	McDonalds Happy Meal	28m
4	McDonalds Happy Meal	27m
5	BK Kids Meal	26m
6	McDonalds Happy Meal	26m
7	KFC Kids Meal	25m
8	KFC Kids Meal	25m
9	KFC Kids Meal	25m
10	BK Kids Meal	25m

2004		
	Brand	Impacts
1	KFC Kids Meal	57m
2	McDonalds Happy Meal	43m
3	McDonalds Happy Meal	42m
4	McDonalds Happy Meal	41m
5	McDonalds Happy Meal	41m
6	KFC Kids Meal	38m
7	BK Kids Meal	37m
8	BK Kids Meal	35m
9	BK Kids Meal	34m
10	McDonalds Happy Meal	34m

Confectionery

2003		
	Brand	Impacts
1	Haribo Mixes	101m
2	Haribo Mixes	93m
3	Real Fruit Winders	71m
4	Juicy Drop Pop	70m
5	Weetos Cereal Bar	68m
6	Screamin Fruit Squidgers	64m
7	Penguin Chukkass	62m
8	Kinder Surprise	61m
9	Cereal Bar Range	58m
10	Cereal Bar Range	53m

2004		
	Brand	Impacts
1	Screamin Fruit Squirters	92m
2	Starburst	88m
3	Haribo Mixes	79m
4	Haribo Mixes	76m
5	Kinder Surprise	69m
6	Hubba Bubba	67m
7	Chupa Chups Cremosa	62m
8	Fruity Smarties	54m
9	Haribo Mixes	45m
10	Haribo Mixes	44m

Soft Drinks

2003		
	Brand	Impacts
1	Fruit Shoot	70m
2	Fruit Shoot	67m
3	Tango	55m
4	Capri Sun	53m
5	Freekee Soda	48m
6	Capri Sun	31m
7	Vimto	30m
8	Im-Bru	26m
9	Ribena	24m
10	Ribena	23m

2004		
	Brand	Impacts
1	Fruit Shoot	66m
2	Tizer	33m
3	Ribena	32m
4	Ribena	31m
5	Tango	25m
6	Fruit Shoot	21m
7	Pepsi	21m
8	Fruit Shoot	20m
9	Tango	19m
10	Vimto	19m

Savoury Snacks

2003		
	Brand	Impacts
1	Wotsits	46m
2	Skips	40m
3	Skips Buzz Boltz	40m
4	Skips Tickle Pickle	37m
5	Wotsits+Quavers+Monster Munch	33m
6	Quavers + French Fries	30m
7	Creative unavailable	
8	Quavers	8m
9	Mini TUC Sesame	5m
10	Walkers Sensations	5m
11	TUC	4m

2004		
	Brand	Impacts
1	Flamin Hot Wotsists	73m
2	Twisted Wotsits	51m
3	Creative unavailable	
4	Quavers	24m
5	Pringles	2m
6	Walkers Mediterranean range	2m
7	Creative unavailable	
8	TUC	2m
9	Walkers Sensations	1m
10	Walkers Crisps	1m
11	Squares	1m
12	Pringles	1m

All other Core Category

2003		
	Brand	Impacts
1	Cheez Double Dippers	54m
2	Munch Bunch	51m
3	Double Dunkers – Pizza	45m
4	Cheez Dippers	44m
5	Mini Babybel	38m
6	Munch Bunch	38m
7	Attack-a-snack	37m
8	Double Dunkers – Nachos	36m
9	Creative unavailable	
10	Dairylea Dunkers	32m
11	Muller Yoghurt Squeezers	30m

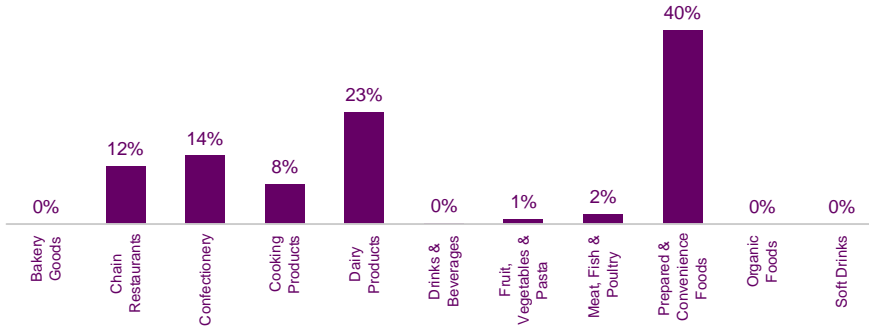
2004		
	Brand	Impacts
1	Cheez Dippers	81m
2	Cheez Double Dippers	58m
3	Young'uns Fish	57m
4	Cheestrings	52m
5	Dairylea Dunkers	43m
6	Muller Yogz	40m
7	Crusha	36m
8	Chicken Tonight	34m
9	Crusha	33m
10	Muller Yogz	32m

Appendix 3

Core Category activity by channel

Boomerang: Classification of commercials by sub-category

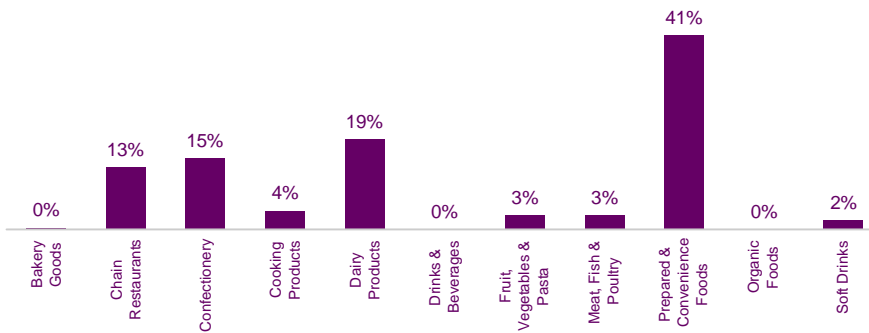
Proportion of all Core Category commercials analysed



Source: CRG/Ofcom

Cartoon Network: Classification of commercials by sub-category

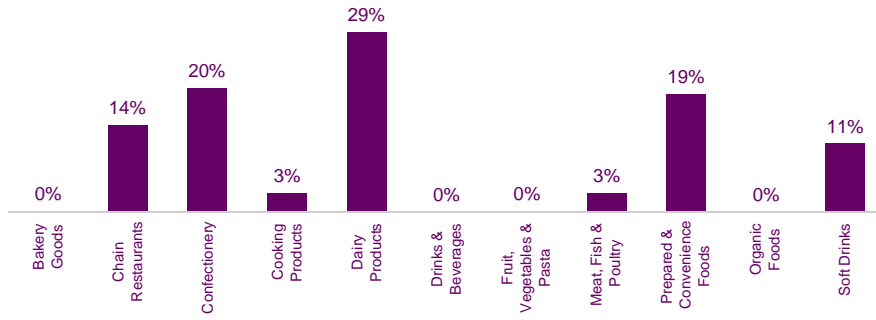
Proportion of all Core Category commercials analysed



Source: CRG/Ofcom

Nickelodeon: Classification of commercials by sub-category

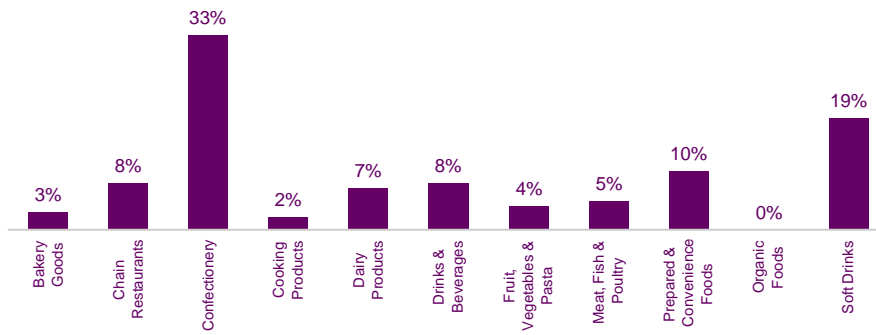
Proportion of all Core Category commercials analysed



Source: CRG/Ofcom

Trouble: Classification of commercials by sub-category

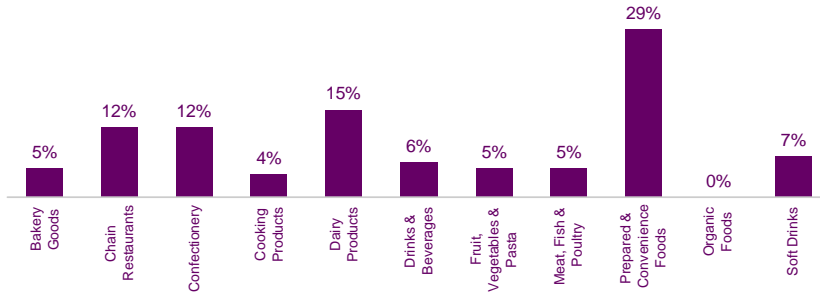
Proportion of all Core Category commercials analysed



Source: CRG/Ofcom

Terrestrial channels: Classification of commercials by sub-category

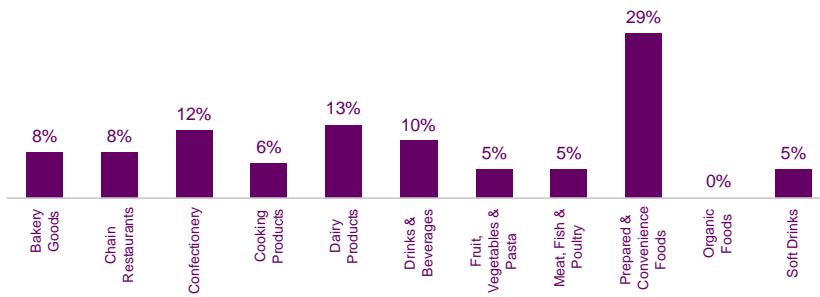
Proportion of all Core Category commercials analysed



Source: CRG/Ofcom

Terrestrial channels, Adults Airtime: Classification of commercials by sub-category

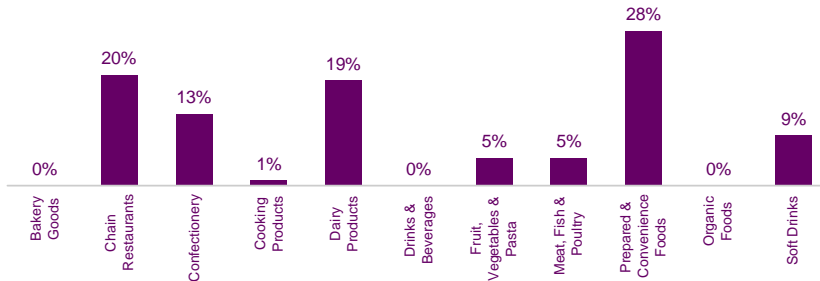
Proportion of all Core Category commercials analysed



Source: CRG/Ofcom

Terrestrial channels, Children's airtime: Classification of commercials by sub-category

Proportion of all Core Category commercials analysed



Source: CRG/Ofcom

Appendix 4

Programme sponsorship

Product	Programme sponsored	Number of appearances	Channel
Cadbury Cream Egg Minis	Coronation Street	12	ITV1
Cadbury Hot Chocolate	Heartbeat	8	ITV1
Cadbury Milk Chocolate Wafer	Coronation Street	8	ITV1
Cadbury Milk Chocolate Wafer	When Ken Met Deirdre	4	ITV1
Heinz Tomato Ketchup	Emmerdale	24	ITV1
KFC	Saturday Night Takeaway	7	ITV1
Cheesestrings	Ministry of Mayhem	10	ITV1
Appletizer	Friends	8	C4
Pizza Hut 4 for All	The Simpsons	24	C4
Birds Eye	5 Weather	8	Five
Ginsters	Joey	5	Five
Ginsters	Two and a Half Men	4	Five
KFC	Home and Away	14	Five
Weetabix Weetos	Milkshake	37	Five
Weetabix Weetos	George Shrinks	2	Five
Wrigleys Airwaves	5 th Gear	8	Five
Laughing Cow Cheez Dippers	Spongebob Squarepants	43	Nickelodeon
Mini Babybel	Nickelodeon 4-6	16	Nickelodeon

Appendix 5

Programme promotion sponsorship

Product	Programme sponsored	Number of appearances	Channel
Cadbury Milk Chocolate Wafer	When Ken Met Deirdre	1	ITV1
Cadbury Hot Chocolate	Heartbeat	2	ITV1
Leerdammer	Midsomer Murders	4	ITV1
Snack A Jacks	No Angels	1	C4
Wrigleys Airwaves	5 th Gear	5	Five
Ginsters	Competition Sponsor	1	Five
Ginsters	Joey	8	Five
Ginsters	Two and a Half Men	2	Five