

# Assessment of the Impact of the Commercial World on children's Wellbeing

TV Media Review

1997 to 2007

## EXECUTIVE SUMMARY

Between 1997 to 2007 total TV expenditure increased from £3.05bn to £3.95bn, reaching a high of £4.07bn in 2005. During this same period TV expenditure by brands targeting programmes watched by 4 to 15-year-olds declined from £248m to £215m, after a brief renaissance in 2004 and 2005, and a low of £160m in 2003.

During the period the 4 to 15 year-old demographic was exposed to both child (Action man), Adult (Budweiser beer) and neutral (Weetabix) brand advertisements. Over the ten-year period, adult/neutral brands outspent children brands in four out of the ten years tracked, including 2005, 2006 and 2007.

The three biggest product categories by total expenditure over the ten year period were cereals & confec-

tionary, newspapers and confectionary. Cereals & Crisps recorded its highest level of spend at £41m since 1999 in 2007, although this is still well below the £54m in 1997. Surprisingly, newspapers was the second highest category with spend remaining flat at between £31m to £32m between 2005 to 2007. Confectionary recorded a marked decline from £25m in 2002 down to £8m in 2007.

Other product categories in the top 10 in order of total spend are: diary, personal hygiene, action toy figures, drinks & beverages, hair products, alcohol and lottery products.

Breaking the data down further to minor category and by brands reveals that the highest spending category is cereals (ready to eat) represented by the Kelloggs cornflakes and crunchy nut cornflake

brands, chocolate bars & countline products, toys and games, British Sunday newspapers represented by the Mail on Sunday and the News of the World, and shampoos and conditioners.

Topical and sometimes controversial product categories such as Telecoms, prepared convenience food, internet providers, lottery and alcohol have all reduced their expenditure since 2005. The only category to show an increase is Dairy Products & Substitutes in 2006 before declining in 2007. The movements described above are reflected by brands such as Vodafone, 3 and Walkers Crisps all reducing their expenditure, while spend on products such as cheese strings and Mini Baby Bel increased until 2006 before falling back in 2007.

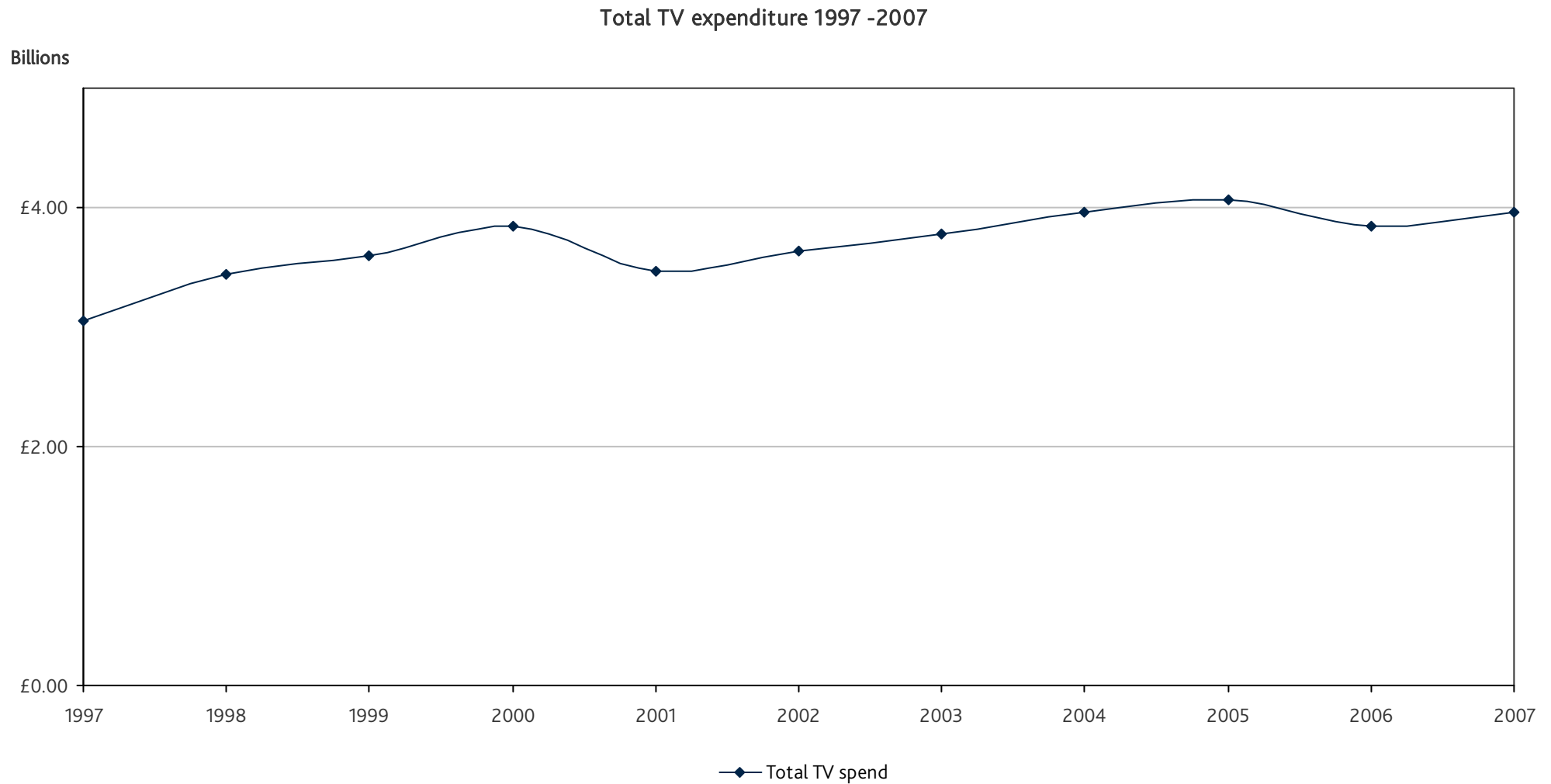
The data collected indicates that

despite total TV advertising increasing over the period 1997 to 2007 the amount of TV advertising by brands targeting 4 to 15 year-olds decreased significantly.

It is also apparent that over the last three years young people are increasingly being exposed to either adult or neutral products e.g. national newspapers, adult ready-to-eat cereals and shampoos and conditioners.

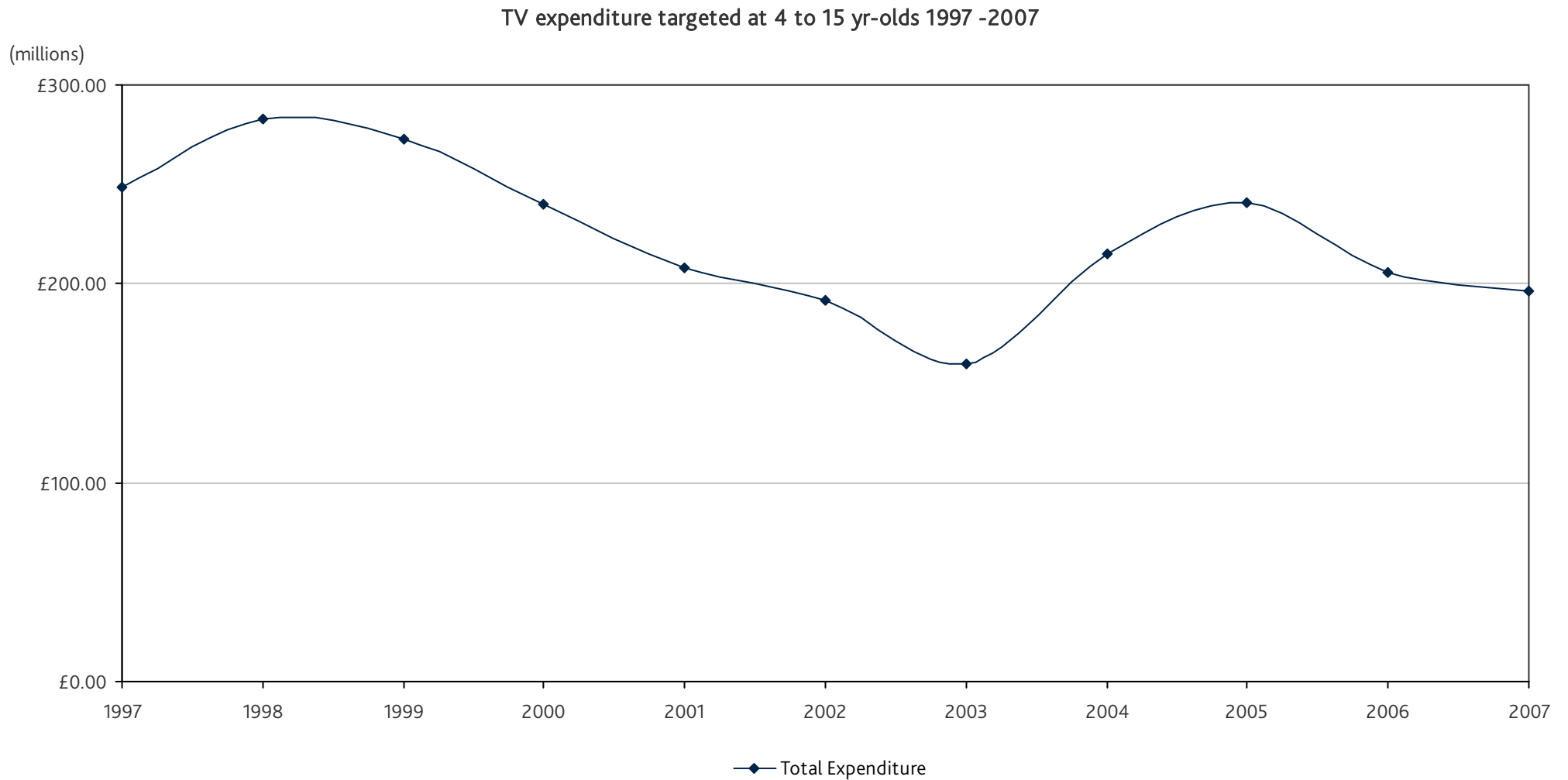
Finally, in November 2006 Ofcom announced restrictions on the television advertising of food and drink products to children. Bearing this in mind, ad spend on soft drinks has remained flat over 2006/07, while prepared/convenience foods spending has fallen to under £10m in 2007.

## TOTAL TV SPEND



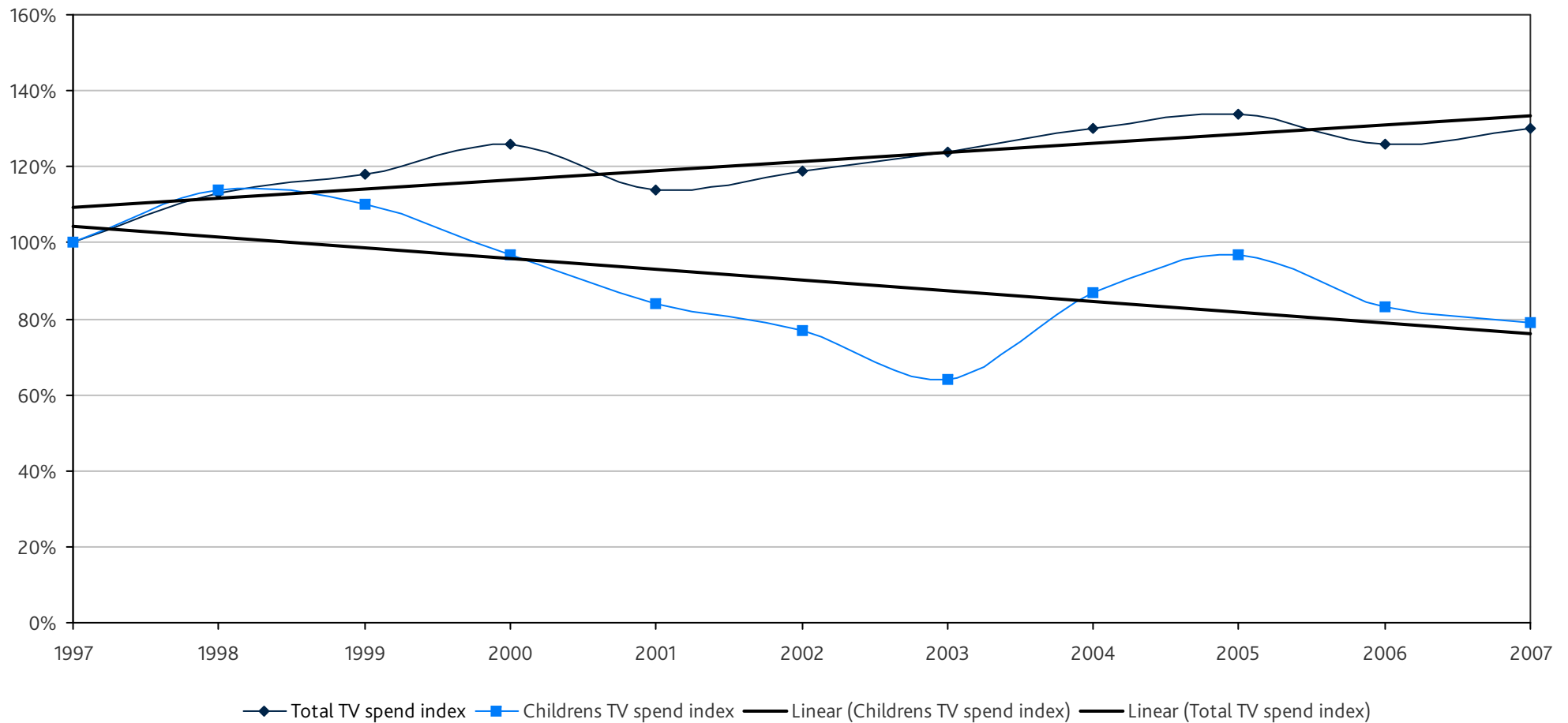
## 4

## TV expenditure targeted at 4 to 15 yr-olds



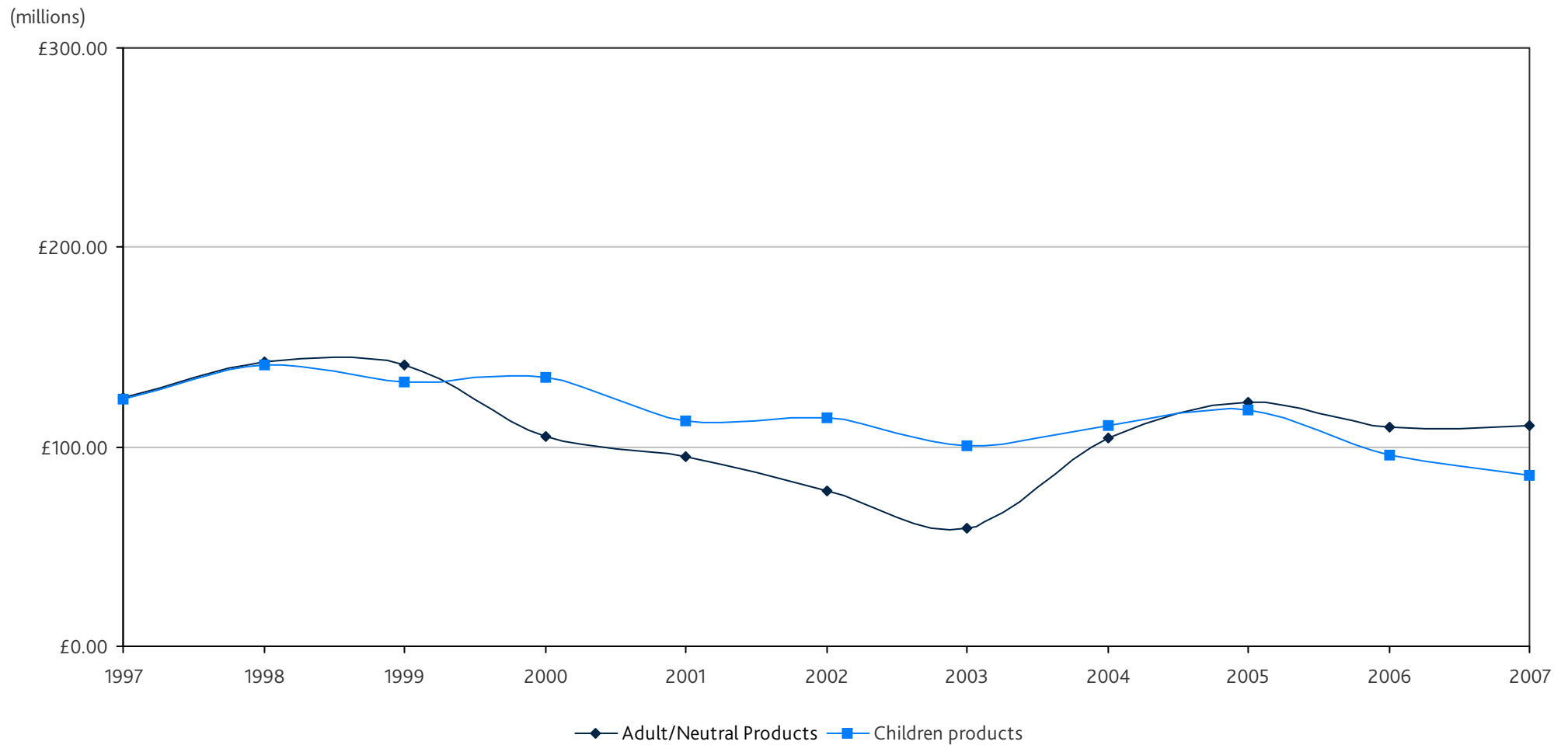
## Change in TV spend.

% Change in total TV spend vs. % change in TV spend targeted at 4 to 15 yr-olds 1997 -2007



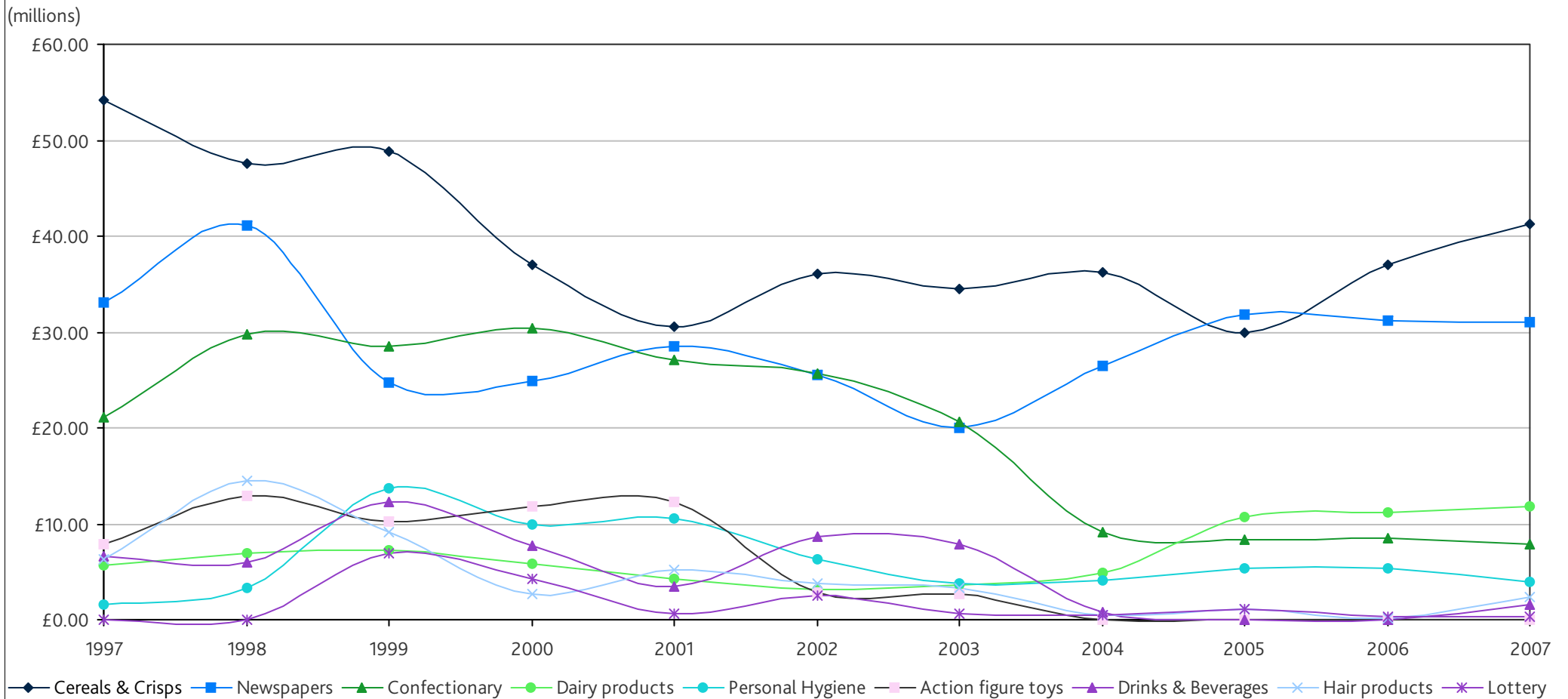
## Children vs. Adult/Neutral ad. expenditure

TV expenditure targeted at 4 to 15 yr-olds 1997 -2007



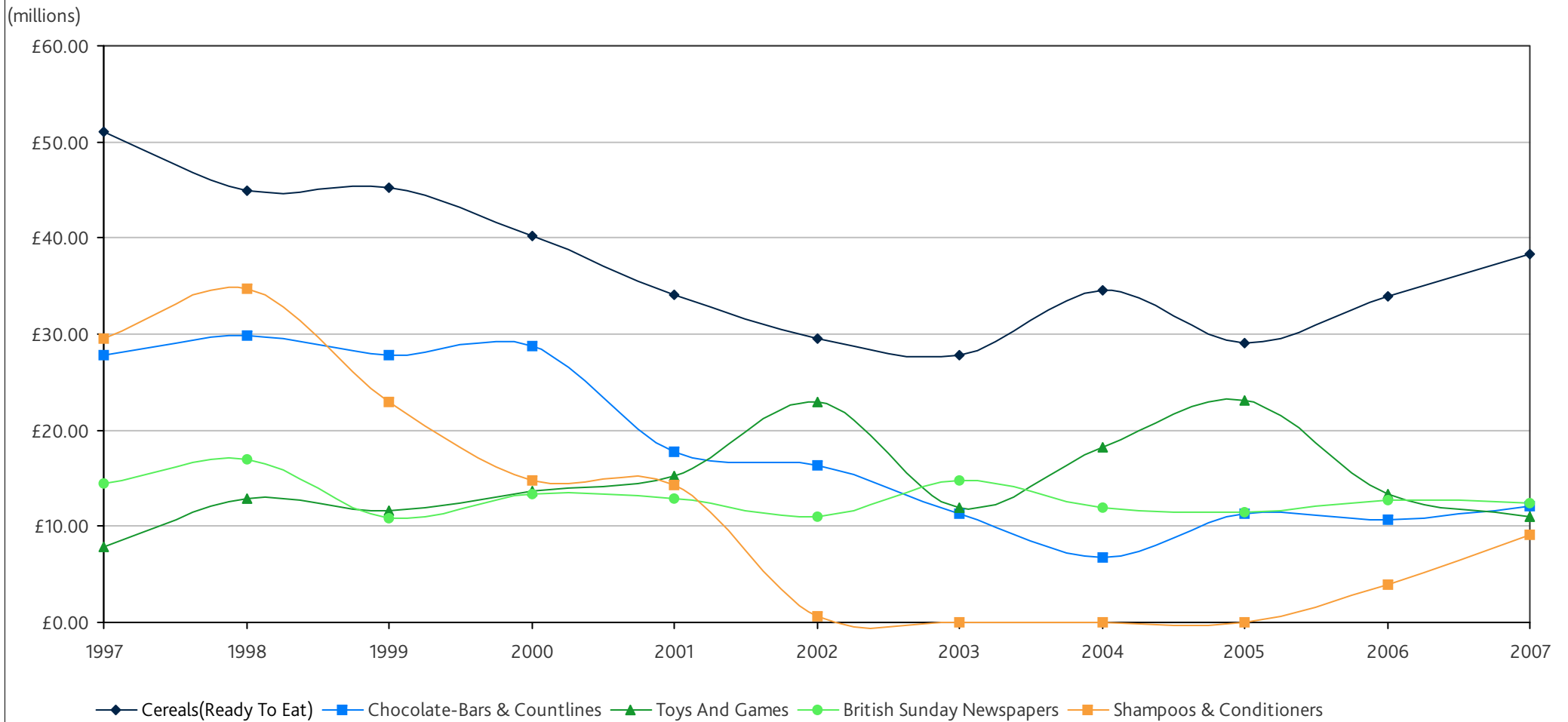
## Top 10 product mid-categories

TV expenditure targeted at 4 to 15 yr-olds by top 5 mid-categories



## Top 5 minor product categories

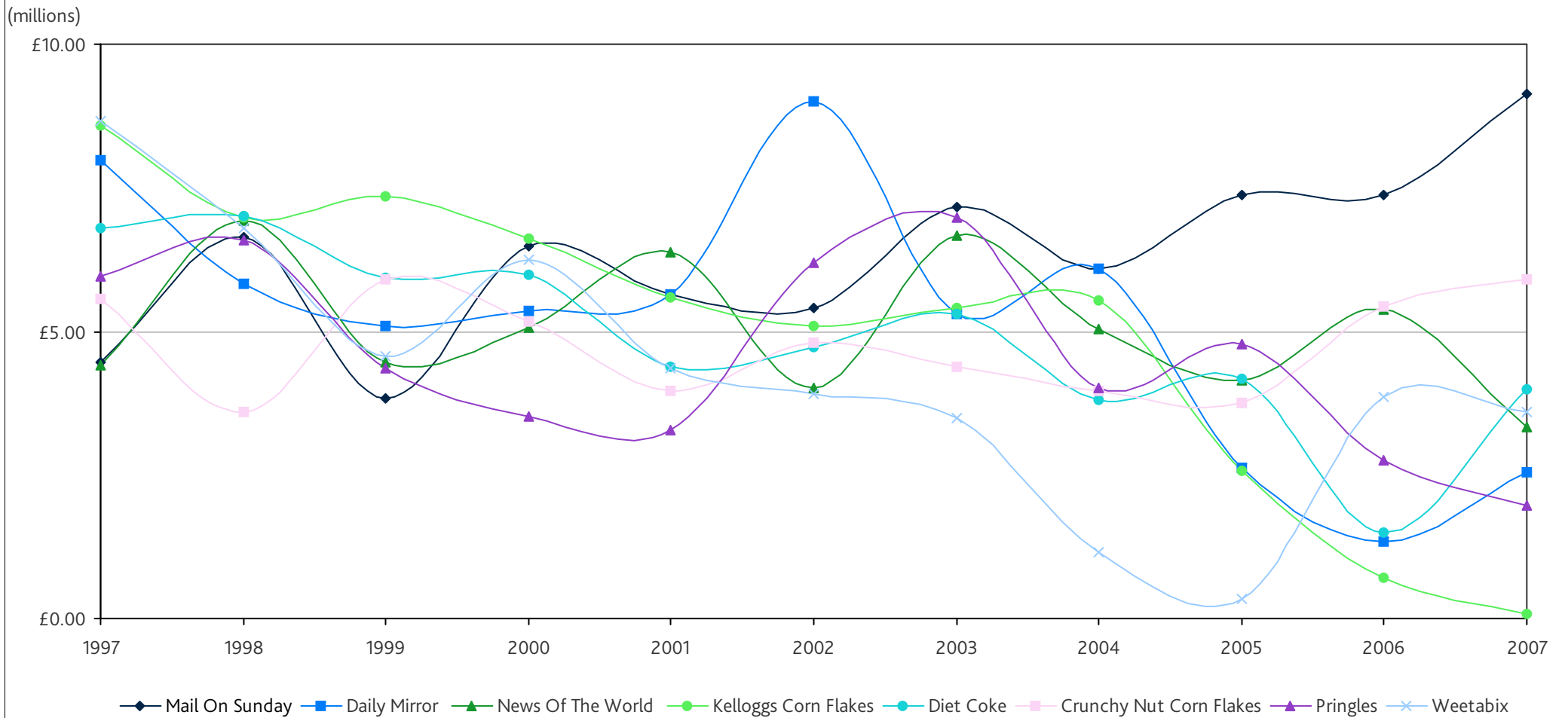
TV expenditure targeted at 4 to 15 yr-olds by top 5 Minor-categories





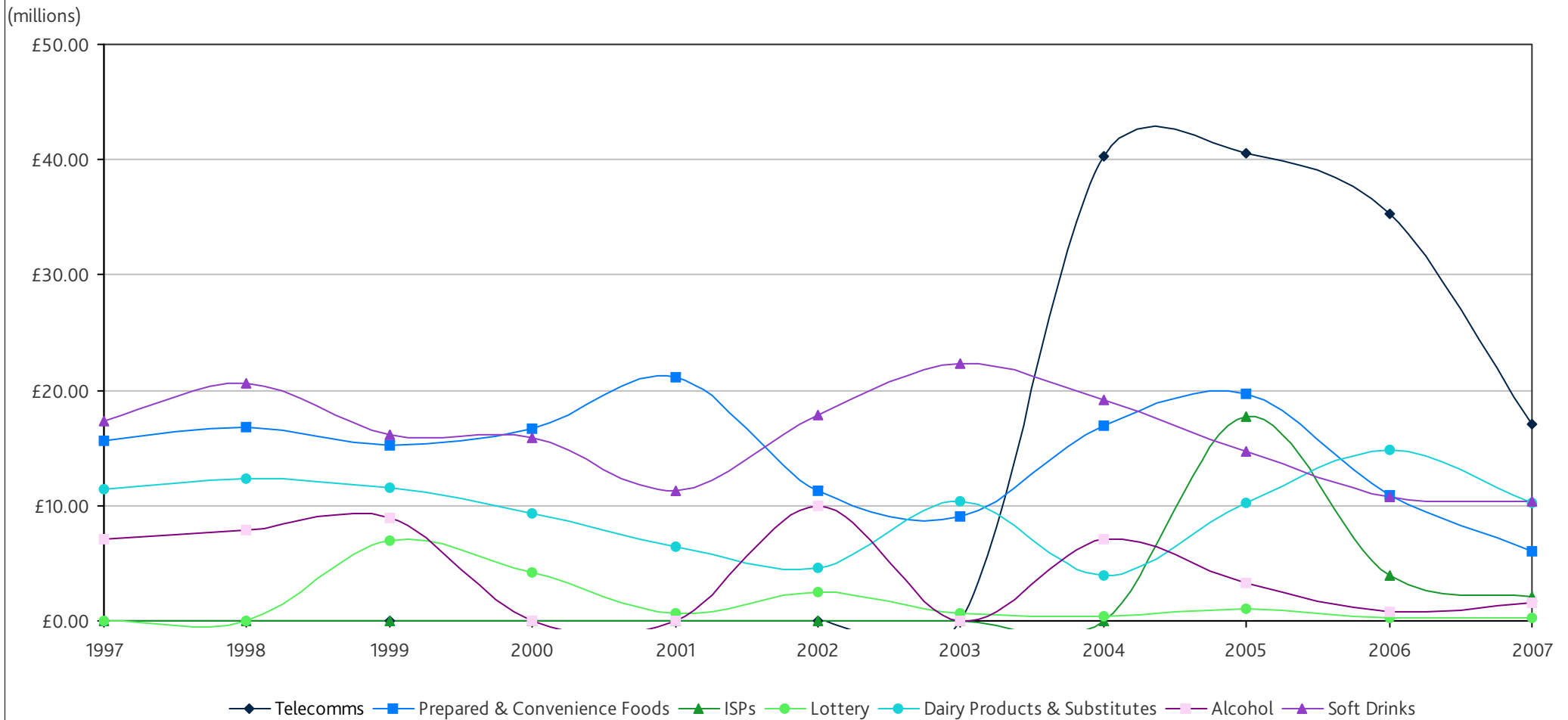
# Top 8 Brands

TV expenditure targeted at 4 to 15 yr-olds by top 8 brands (advertised in all yrs from 1997-07)



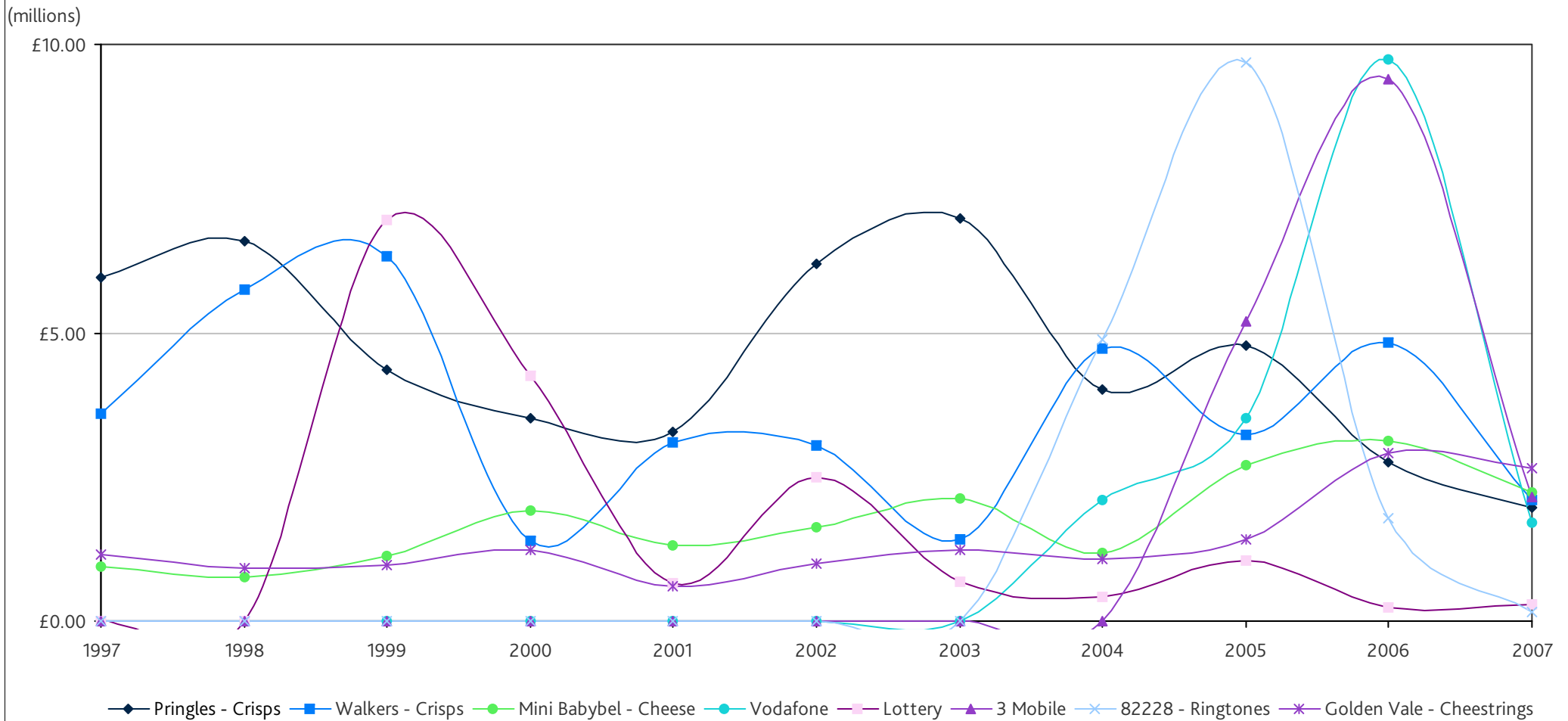
# Topical Product Categories

TV expenditure targeted at 4 to 15 yr-olds by topical categories



# Topical Brands

TV expenditure targeted at 4 to 15 yr-olds by topical brands



## Top 20 Brands 1997 to 1999

	1997 (£m)		1998 (£m)		1999 (£m)
Weetabix - Cereal	£8,667,954	Pantene Pro V - Shampoos	£9,877,023	Budweiser Beer - Lager	£8,883,984
Kelloggs - Corn Flakes	£8,578,269	Mattel - Barbie Dolls	£9,438,269	Sun - Newspaper	£8,758,154
Daily Mirror - Newspaper	£7,991,757	Daily Mail - Newspaper	£9,173,337	Kelloggs - Corn Flakes	£7,347,900
Loreal - Elvive Shampoo	£7,387,989	Sun - Newspaper	£9,131,546	Procter & Gamble - Sunny Delight	£6,958,466
Elida - Organics Rge	£7,200,012	Budweiser Beer - Lager	£7,831,390	Nescafe - Instant Coffee Rge	£6,954,124
Budweiser Beer - Lager	£7,066,795	Coca Cola - Diet Coke	£7,001,985	Camelot Grp - Thunderball	£6,952,623
Coca Cola - Diet Coke	£6,799,877	Kelloggs - Corn Flakes	£6,987,616	Mars - Mars Bar	£6,585,988
Head & Shoulders - Shampoo	£6,256,024	News Of The World - Newspaper	£6,930,405	Mattel - Barbie Dolls	£6,544,217
Pantene Pro V - Hairspray	£6,203,388	Weetabix - Cereal	£6,799,266	Walkers - Crisps	£6,313,595
Pringles - Crisps	£5,969,876	Mail On Sunday - Newspaper	£6,628,720	Elida - Sure Deodorant Rge	£6,238,627
Elida - Sure Deodorant Rge	£5,839,597	Pringles - Crisps	£6,578,085	Olivio - Spread	£6,107,715
Britvic - Orange Tango	£5,682,187	Olivio - Spread	£6,155,520	Pantene Pro V - Shampoos	£6,027,850
Kelloggs - Bran Flakes	£5,575,236	Mars - Mars Bar	£6,129,728	Coca Cola - Diet Coke	£5,932,598
Kelloggs - Crunchy Nut Corn Flake	£5,570,196	Procter & Gamble - Sunny Delight	£6,046,179	Kelloggs - Crunchy Nut Corn Flake	£5,895,038
Sunday Mirror - Newspaper	£5,531,597	Tetley - Tea Bag Rge	£6,000,648	Dove - Deodorant Rge	£5,804,154
Daily Mail - Newspaper	£5,514,874	Dolmio - Sauce Range	£5,865,357	Tetley - Tea Bag Rge	£5,282,472
Tetley - Tea Bag Rge	£5,363,625	Daily Mirror - Newspaper	£5,828,378	Kelloggs - Special K Cereal	£5,169,309
Sun - Newspaper	£5,205,702	Kelloggs - Special K Cereal	£5,745,974	Daily Mirror - Newspaper	£5,094,976
Dolmio - Sauce Range	£5,204,519	Walkers - Crisps	£5,737,694	Kitkat - Chocolate Bar	£4,981,577
Mattel - Barbie Dolls	£5,079,205	Kelloggs - Bran Flakes	£5,576,392	Gillette - Mach3 Razor	£4,814,947

## Top 20 Brands from 2000 to 2002

	2000 (£m)		2001 (£m)		2002 (£m)
Mattel - Barbie Dolls	£6,772,748	Daily Mail - Newspaper	£9,950,564	Budweiser Beer - Lager	£9,931,522
Kelloggs - Corn Flakes	£6,623,001	Mattel - Barbie Dolls	£8,149,955	Mattel - Barbie Rge	£9,113,293
Dolmio - Sauce Range	£6,546,482	Kitkat - Chocolate Bar	£7,687,605	Daily Mirror - Newspaper	£9,014,972
Mail On Sunday - Newspaper	£6,469,916	Wrigley - Orbit Chewing Gum	£6,632,998	Pringles - Crisps	£6,206,920
Sun - Newspaper	£6,260,892	News Of The World - Newspaper	£6,384,629	Procter & Gamble - Sunny Delight	£5,989,160
Weetabix - Cereal	£6,237,936	Danone - Actimel	£6,013,870	Nescafe - Instant Coffee Rge	£5,803,627
Coca Cola - Diet Coke	£5,986,689	Daily Mirror - Newspaper	£5,652,109	Sun - Newspaper	£5,500,026
Kitkat - Chocolate Bar	£5,521,899	Mail On Sunday - Newspaper	£5,636,500	Mail On Sunday - Newspaper	£5,398,695
Sky - Satellite Television	£5,495,464	Kelloggs - Corn Flakes	£5,594,412	Kelloggs - Corn Flakes	£5,091,908
Procter & Gamble - Sunny Delight	£5,366,534	Sensodyne - Toothpaste	£5,385,339	Wrigley - Extra Chewing Gum	£4,815,840
Daily Mirror - Newspaper	£5,365,251	Dolmio - Sauce Range	£4,378,668	Kelloggs - Crunchy Nut Corn Flake	£4,814,076
Kelloggs - Crunchy Nut Corn Flake	£5,169,169	Coca Cola - Diet Coke	£4,375,628	Coca Cola - Diet Coke	£4,712,838
News Of The World - Newspaper	£5,065,460	Weetabix - Cereal	£4,363,118	Wrigley - Orbit Chewing Gum	£4,648,999
Kelloggs - Cereal Range	£5,002,014	Hasbro - Action Man	£4,072,640	Kitkat - Chocolate Bar	£4,611,356
Hasbro - Action Man	£4,986,320	Kelloggs - Special K Cereal	£4,040,159	Mars - Maltesers	£4,301,113
Gillette - Mach3 Razor	£4,709,229	Kelloggs - Crunchy Nut Corn Flake	£3,965,458	News Of The World - Newspaper	£4,022,208
Danone - Actimel	£4,537,256	Wrigley - Extra Chewing Gum	£3,793,698	Dove - Deodorant Rge	£3,949,489
Kelloggs - Special K Cereal	£4,473,386	Wrigley - Airwaves Chewing Gum	£3,669,481	Weetabix - Cereal	£3,917,858
Tetley - Tea Bag Rge	£4,472,244	Findus - Feeling Great Frozen Mea	£3,558,012	Danone - Actimel	£3,818,511
Wrigley - Airwaves Chewing Gum	£4,418,075	McVities - Go Ahead Snack Rge	£3,421,337	Head & Shoulders - Shampoo	£3,810,314

\*\* Please note that all Direct Mail expenditure figures represent unsolicited addressed mail only. Door Drops and statement inserts are not included \*\*

## Top 20 Brands from 2003 to 2005

	2003 (£m)		2004 (£m)		2005 (£m)
Coca Cola - Original Coke	£7,633,155	Coca Cola - Original Coke	£9,269,990	82228 - Ringtones	£9,681,216
Mail On Sunday - Newspaper	£7,176,618	Danone - Actimel	£8,864,116	Aol - Broadband	£9,493,999
Pringles - Crisps	£6,989,223	Tele2 - Phone Rates	£8,774,440	Daily Mail - Newspaper	£9,166,450
News Of The World - Newspaper	£6,656,467	Sun - Newspaper	£8,434,312	Sun - Newspaper	£8,529,022
Walls - Magnum Deadly Sins	£6,082,807	Yellow Pages - Paper Directories	£7,577,589	Orange - Broadband	£8,164,029
Kelloggs - Corn Flakes	£5,407,041	Budweiser Beer - Lager	£7,102,505	Danone - Bio Activia Yoghurt	£7,992,103
Daily Mirror - Newspaper	£5,297,975	Vodafone - Vodafone Live	£7,073,991	Coca Cola - Original Coke	£7,423,026
Coca Cola - Diet Coke	£5,290,796	Virgin Mobile - Text Messages	£6,121,635	Mail On Sunday - Newspaper	£7,387,438
Nescafe - Instant Coffee Rge	£5,118,950	Mail On Sunday - Newspaper	£6,096,716	M&S - Food Rge	£6,877,612
Kelloggs - Crunchy Nut Corn Flake	£4,377,134	Daily Mirror - Newspaper	£6,094,437	Kelloggs - Spec K Cereal	£6,849,884
Procter & Gamble - Sunny Delight	£4,281,025	Kelloggs - Corn Flakes	£5,549,260	Vodafone - Vodafone Live 3g	£5,777,792
Wrigley - Orbit Chewing Gum	£4,245,422	News Of The World - Newspaper	£5,026,923	Three - 3g Mobile Network	£5,205,839
Mars - Maltesers	£4,199,045	Birds Eye - Prod Rge	£4,980,362	Pringles - Crisps	£4,767,869
Kelloggs - Special K Cereal	£3,643,190	82228 - Ringtones	£4,889,189	Kelloggs - Cereal Range	£4,662,800
Weetabix - Cereal	£3,481,105	Kelloggs - Rice Krispies Muddles	£4,823,136	Tele2 - Phone Rates	£4,595,517
Dove - Deodorant Rge	£3,478,158	Walkers - Crisps	£4,734,461	Yellow Pages - Paper Directories	£4,334,415
Wrigley - Airwaves Chewing Gum	£3,473,884	Kelloggs - Frosties	£4,328,324	Coca Cola - Diet Coke	£4,177,564
Danone - Actimel	£3,202,384	Dove - Deodorant Rge	£4,118,664	Yoplait - Petits Filous	£4,159,857
Kitkat - Chocolate Bar	£3,083,491	Kelloggs - Spec K Cereal	£4,096,765	News Of The World - Newspaper	£4,150,066
Head & Shoulders - Shampoo	£3,036,387	Pringles - Crisps	£4,017,243	Kelloggs - Crunchy Nut Corn Flake	£3,762,321

## Top 20 Brands from 2006 to 2007

	2006 (£m)		2007 (£m)
Vodafone - Mobile Phone Network	£9,730,801.0	Danone - Bio Activia Yoghurt	£9,514,224
Sun - Newspaper	£9,657,483.0	Danone - Actimel	£9,364,907
Three - 3g Mobile Network	£9,389,938.0	Mail On Sunday - Newspaper	£9,130,479
Danone - Bio Activia Yoghurt	£8,055,411.0	Daily Mail - Newspaper	£8,952,493
Daily Mail - Newspaper	£7,466,063.0	Sun - Newspaper	£7,079,037
Mail On Sunday - Newspaper	£7,373,934.0	Head & Shoulders - Shampoo/Conditioner	£6,675,108
Yellow Pages - Paper Directories	£7,209,256.0	Kelloggs - Crunchy Nut Corn Flake	£5,915,638
Coca Cola - Original Coke	£6,647,318.0	Coca Cola - Original Coke	£5,911,267
Tmobile - Flex	£6,352,300.0	Kelloggs - Spec K Cereal	£5,263,589
Kelloggs - Spec K Cereal	£5,899,202.0	Number 1 - 118 118	£5,194,639
Yoplait - Petits Filous	£5,890,243.0	Yellow Pages - Paper Directories	£5,134,339
Kelloggs - Crunchy Nut Corn Flake	£5,420,170.0	Tmobile - Flex	£5,045,039
News Of The World - Newspaper	£5,391,422.0	Nestle - Shreddies Cereal	£4,973,421
Kitkat - Chocolate Bar	£5,124,534.0	Kelloggs - Rice Krispies	£4,810,529
Walkers - Crisps	£4,822,669.0	Yoplait - Petits Filous	£4,459,537
Kelloggs - Rice Krispies	£4,130,198.0	Kelloggs - Coco Pops	£4,452,055
Weetabix - Cereal	£3,870,649.0	Coca Cola - Diet Coke	£3,995,340
Yellow Pages - 118 247 Phone Ser	£3,741,789.0	Weetabix - Cereal	£3,603,456
Kelloggs - Cereal Range	£3,594,564.0	Kelloggs - Cereal Range	£3,495,633
Hellmanns - Real Mayonnaise	£3,277,048.0	News Of The World - Newspaper	£3,326,717