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Television Food Advertising to Children in South Australia

Final Report

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Authors: Emily Brindal, Nadia Corsini & Gilly Hendrie
Analyses: Emily Brindal & Danielle Klose
Coding: Jillian Chin, Danielle Klose, Nadia Corsini, Jane Bowen, Gilly Hendrie, Anne McGuffin & Julia Weaver
Data management: Julie Syrette

Enquiries should be addressed to:
Manny Noakes
Manny.Noakes@csiro.au
p (08) 8303 8827

Distribution list

Patricia Carter

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Contents

List of Figures

List of Tables

EXECUTIVE SUMMARY

Background

On 8 February 2008, the South Australian Government announced its intention to address concerns about television advertising of unhealthy food and drinks to children. This supported recommendations of the South Australian Parliament's Social Development Committee's 2006 inquiry into fast food and obesity.

Two self-regulatory industry initiatives pertaining to marketing have recently been introduced in Australia; the Australian Food and Grocery Council's (AFGC) Responsible Marketing to Children Initiative (AFGC, January 2009) and the Australian Association of National Advertisers' and Quick Service Restaurant Industry's Australian Quick Service Restaurant Industry Initiative For Responsible Advertising And Marketing To Children (referred to as the QSRI, August 2009). The AFGC and QSRI Initiative identify core principles and make specific commitments to advertising to children.

In the AFGC Initiative, signatories commit to not advertising to children (persons under the age of 12) unless (1) the products represent healthy choices or (2) the advertising reference is in the context of healthy lifestyle messages including good dietary or physical activity habits. Signatories also commit to not use popular personalities, program or licensed characters unless the advertising complies with (1) and (2) above. In addition, signatories commit not to advertise premium offers "unless the reference to the premium is merely incidental to the product being advertised" (Responsible Children's Marketing Initiative of the Australian Food and Beverage Council [6]). Finally, signatories commit to not advertise at all during children's programs, which include all pre-school (P) and children's (C) programs, some general (G) programs, and during all programs where more than 50% of the audience is children.

The QSRI Initiative is similar to the AFGC Initiative. The core principles state that advertising or marketing communications to children (persons under the age of 14) for food and beverages must (1) represent healthier choices and/or (2) represent a healthy lifestyle. Amongst other commitments, the signatories to the QSRI initiative commit to is not using popular personalities and licensed characters unless the communication is consistent with the above conditions. Furthermore signatories have a similar disclaimer to the AFGC initiative in regards to premium offers.

The primary objectives of this report are to:

1. Report on the nature and extent of food advertising on free to air (FTA) television in Adelaide and Whyalla, and Pay TV between October 2008 and July 2010,

2. Report on trends in advertising over that period, for signatories and non signatories to the voluntary food industry initiatives intended to restrict children's exposure to the advertising of unhealthy foods and beverages.

Methods

Television advertising data was purchased from two advertising information companies: Commercial Monitors and AC Nielsen. For Adelaide Metropolitan analyses, six, four-day study periods were utilised (October 2008, February 2009, May 2009, October 2009, March 2010 and July 2010). For Whyalla FTA and Pay TV, only data for the February 2009, March 2010 and July 2010 were collected.

Data on Adelaide audience viewing patterns were obtained for 2008 and 2009 from OzTAM. These data included audience and average daily reach information for four different age groups (children 0-12, 5-12 and 0-14 and adults 18+), across weekends, weekdays and overall and for each of the FTA channels in Adelaide (Seven, Nine and Ten).

All television advertisements were coded according to channel, day (weekday vs. weekend), date, time slot, program name, program classification, children's peak viewing times, advertisement start time and whether the advertisement was for a food product, food company sponsorship (e.g. "This program was brought to you by [food product]…") or a non-food product. Food advertisements (including food company sponsorship advertisements) were further coded for 'food category' (core, non-core and miscellaneous), 'food sub-category' (of which there were 30 - see Appendix B), 'product name and description', 'advertiser', 'brand owner' and the presence of different advertising techniques - 'promotional characters', 'nutrition claims', and 'premium offers'.

This report uses the terms 'core foods' to describe those recommended as part of a healthy diet, consistent with the Australian Guide to Healthy Eating [10], which may be referred to as healthy foods. On the contrary, the term 'non-core foods' describes foods that are not recommended as part of a healthy diet. These are generally high in fat, salt and sugar and may be referred to colloquially as 'junk foods'

Limitations

Only one data point prior to the self-regulatory initiatives was included and this only covered Adelaide free-to-air data, thereby limiting comparison of patterns pre and post-initiative.

Data was purchased from two different media monitoring companies and there were systematic differences between the data sets obtained from each company. Specifically, one company (AC Nielsen) had no non-food advertising and also consistently less food advertisements than the other (Commercial Monitors). Therefore any comparison between the October 2008 or May 2009 data sets and others in the Adelaide free-to-air data is limited.

Data collection time points are not equally spaced and may be influenced by season, factors related to programming as well as the release of new food products.

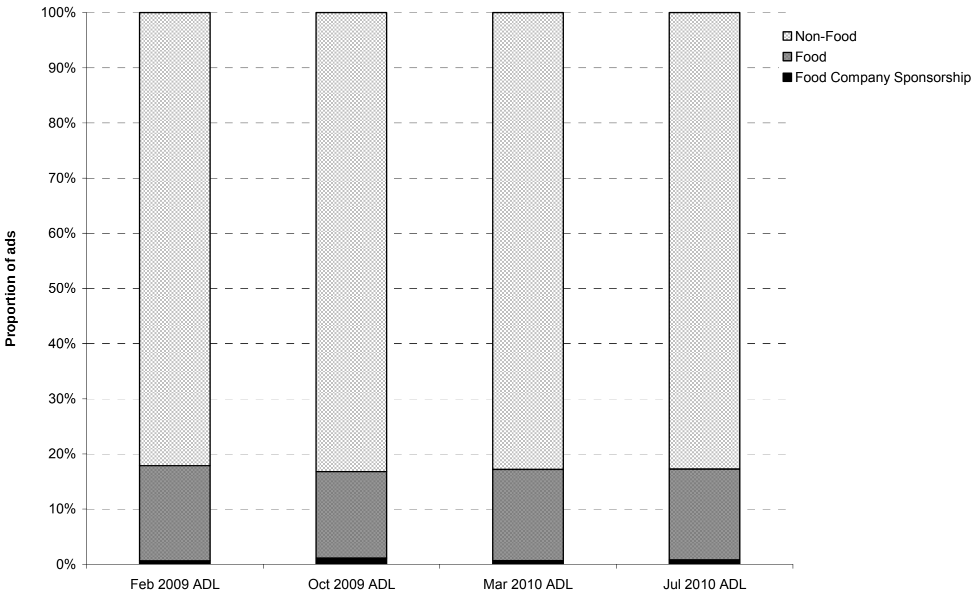
The classification of core and non-core foods in this report required development of a clear set of criteria which facilitated coding and analysis of advertised products for this analysis (see Appendix B). However there is some subjectivity regarding classification of a minority of products (e.g., Yakult as a core food). Varying the way in which these foods are coded may alter the outcomes.

Summary of Results

What is the overall pattern of food advertising?

- There appears to be a minor gradual increase in the total rate of advertisements per hour across the six time points. However, when October 2008 and May 2009 data are excluded due to their different source as outlined above, the relative amount of food advertising has remained relatively stable and still accounts for a small proportion of overall advertising (Summary Figure 1).

- There has been an increase in the number of unique advertisements over the time points considered (+10 ads from Oct 09 to Mar 10; +120 ads from Mar 10 to Jul 10). This may reflect more variety in the style of advertisements that are played or the advertising of a wider number of products.



Summary Figure 1: Proportion (%) of food advertisements relative to non-food and food company sponsorship ads for Adelaide free-to-air television for four time points between February 2009 and July 2010.
NB October 2008 and May 2009 are produced from AC Nielsen data and are not displayed due to the data set only having food advertisements

What are the audiences for free-to-air television?

- There appears to be a slight decrease in child audiences for free-to-air (FTA) from 2008 to 2009 (roughly 10%).

- At any given point in the day, less than 50% of the total viewing audience comprises children (0 -14 years).

- Channel TEN is consistently more popular than other FTA channels with child audiences

What is the proportion of non-core advertising?

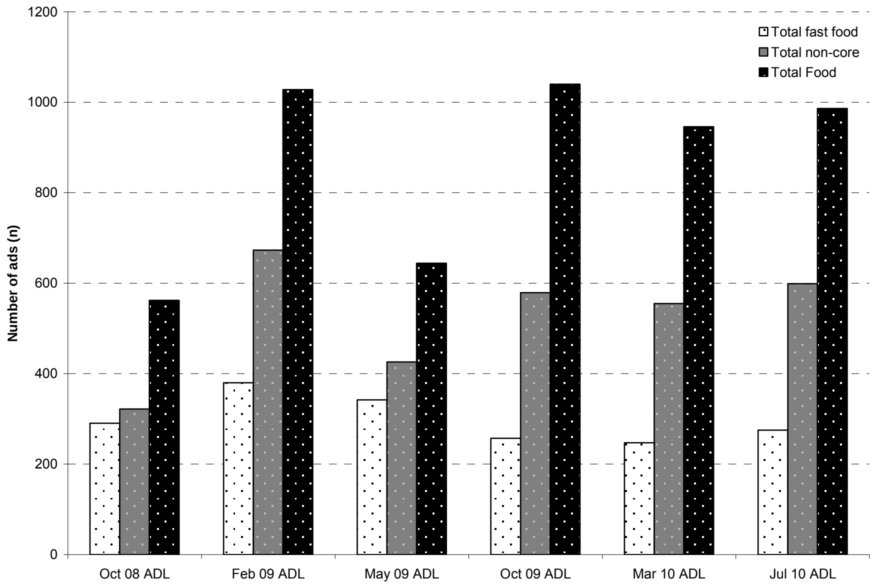
- At every time point, non-core food advertising made up over 50% of all food advertising in Adelaide FTA and Pay TV. The proportion of non-core foods advertised was generally higher on Whyalla free-to-air with almost 75% of all food advertisements being for non-core foods. There were no clear changes in non-core food advertising over time.

- Non-core advertising between the Whyalla television networks was similar. However, there was some variation in the amount of non-core advertising by channel in Adelaide. Channel TEN had the highest proportion of non-core food advertising. The Pay TV channels considered ranged from no non-core advertising (Nick Jnr) to 100% (Cartoon Network).

What types of foods are advertised?

- Across all settings and time points, the advertising of non-core foods classified as "fast foods" accounted for a majority of all non-core food advertising (for Adelaide data see Summary Figure 2). Fast foods accounted for 57% of all non-core food advertising across all of the time points for Adelaide FTA. The second most prominent type of non-core food advertised was sugar-sweetened drinks which accounted for 10% of all non-core food advertising captured.

- Apart from fast foods, chocolate (or confectionary) and sugared-drinks were the most commonly advertised non-core foods. Although sugary drinks were not common in the Whyalla data set, there were a high number of 'non-core food' breakfast advertisements (e.g., Nutrigrain) in these data sets.



Summary Figure 2: Total number (N) of advertisements for food, non-core foods and fast foods for each time point between Oct 2008 and July 2010 for Adelaide free-to-air television.
NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements

- The most common core foods advertised were generally dairy products, breads and combined items. On Pay TV, core foods in the 'healthy' cereals category also contributed a significant number of core food advertising.

At what rate are healthy alternatives advertised for fast food restaurants?

- In Adelaide, the proportion of fast food advertising promoting healthy alternatives was not consistent across time points (from 0 to 25% or fast food advertising). Quick-service restaurants advertised more heavily than fast casuals (such as Caffe Primo) with companies such as McDonald's, Subway and Hungry Jack's being amongst the heaviest advertisers across all food advertisements.

- The proportion of healthy fast food alternatives shown was higher on Pay TV (6.4 to 58.4%) compared to Adelaide FTA (0 to 25.5%) although generally, non-core fast foods still made up the majority (>50%) of fast food advertising in 2 out of 3 time points.

What marketing techniques are used to advertise foods?

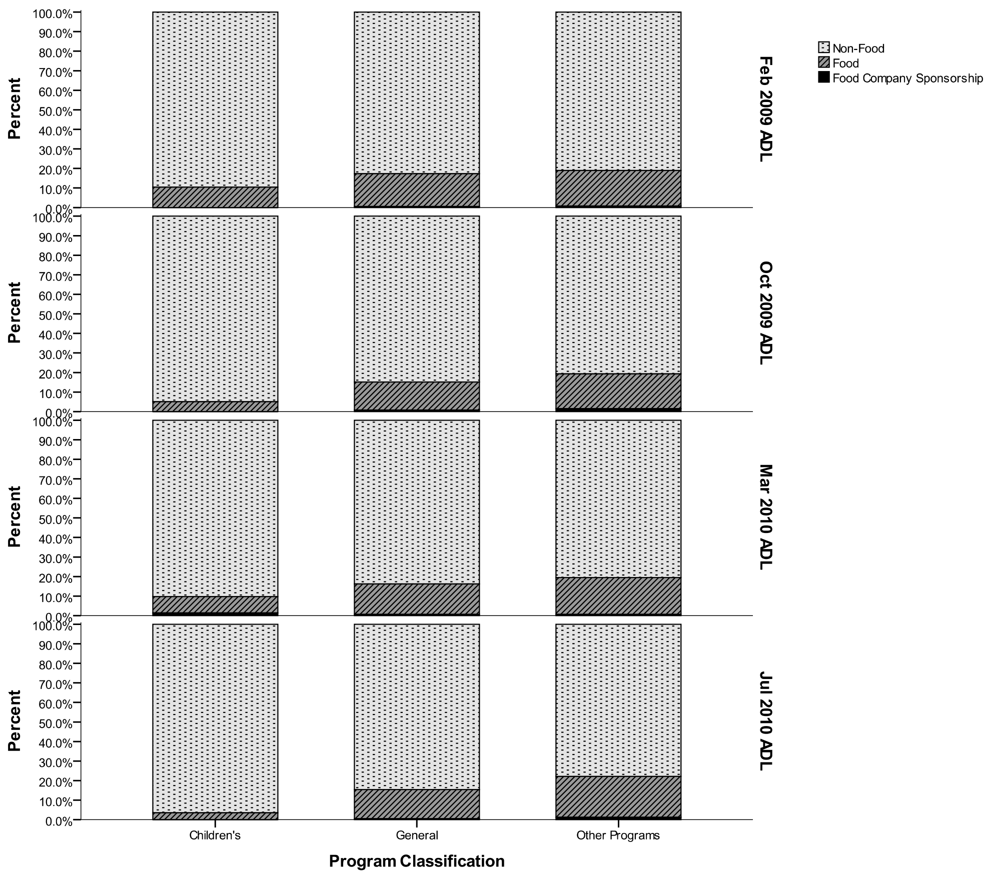
- Overall, nutrition claims, promotional characters and/or premium offers were used in less than half of the advertisements in all FTA data sets coded. When advertising techniques are used, they are mostly nutrition claims.

- The use of techniques seemed to be associated with advertising non-core foods more than core foods. For example, roughly 50% versus 8% of advertisements using promotional characters were for non-core and core foods respectively.

- Use of marketing techniques was higher on Pay TV (63.8 to 29.9% used a technique) than on Adelaide FTA (49.1 to 22.8% used a technique).

What pattern of food advertising are children exposed to?

- Food advertisements make up a small proportion of total advertisements in Adelaide Metro FTA (17% in July 2010) particularly in children's (C) classified programs (on average 6.3%; see Summary Figure 3).



Summary Figure 3: Proportion (%) of food advertisements relative to non-food and food company sponsorship ads by different program classifications (Children's, General and other) for Adelaide free-to-air television for four time points between February 2009 and July 2010.

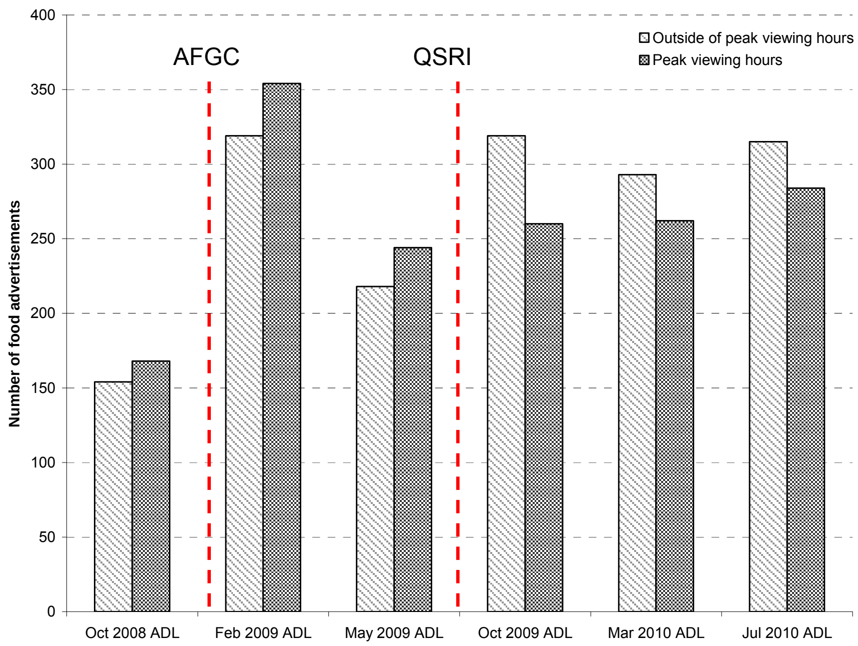
N.B October 2008 and May 2009 are produced from AC Nielsen data and are not displayed due to the data set only having food advertisements

- It is important to note that peak viewing times[1] for children included a large range of time slots which overlap with adult viewing times. On weekdays peak

[1] The peak viewing times for children aged 0 to 14 years in Adelaide were defined using audience data provided by OzTAM as those times where the number of children viewing television (on all Adelaide FTA channels combined) is greater than 35% of the maximum child audience rating for the entire day.

viewing was between 5.30pm and 10pm. During weekends, there was an additional peak during the morning, from 7.30/8am to 11am.

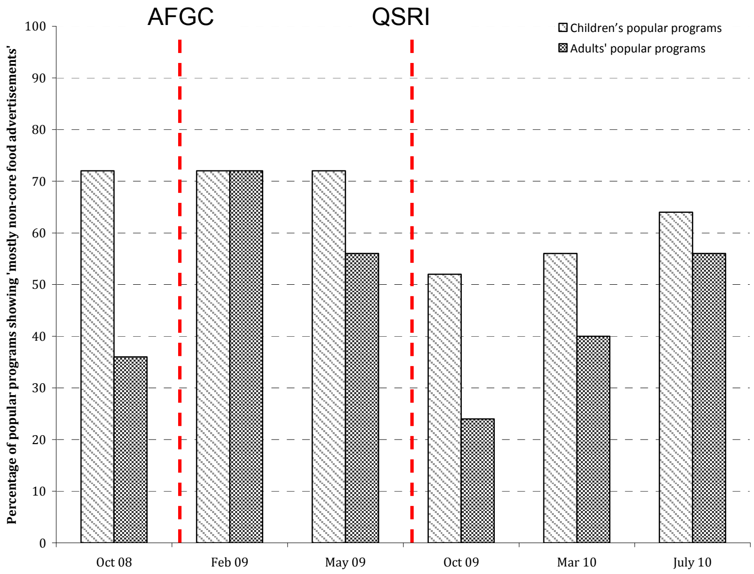
- There were no clear trends or discrepancies in the rate of core and non-core food advertising during children's peak and outside of peak viewing hours.
- Small trends were observed for non-core food advertising within and outside of peak viewing times across the time points. Prior to May 2009, non-core food advertising was slightly higher during peak hours; however since October 2009 the number of non-core food advertisements has been slightly higher outside of peak viewing hours times (see Summary Figure 4). The vertical dotted lines show the commencement dates of the food industry voluntary children's marketing initiatives.[2]



Summary Figure 4: Number (N) of non-core food advertisements inside and outside of children's peak viewing times across all time points for Adelaide free-to-air television between October 2008 and July 2010
NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements. Dashed red line marks the commencement of the respective industry initiatives.

- Non-core food advertising was more common during children's popular programs compared to adult popular programs. The percentage of popular programs showing mostly non-core food advertising (more than 50% of food advertisements were for non-core food items) was higher during programs popular with children compared to those popular with adults at 5 out of 6 time points (see Summary Figure 5).

[2] The Australian Food and Grocery Council's (AFGC) Responsible Children's Marketing Initiative (RCMI) was announced on 24 October 2008 and came into effect on 1 January 2009; the Australian Association of National Advertisers' (AANA) and Quick Service Restaurant Industry's Initiative for Responsible Advertising and Marketing to children (QSRI) was announced on 25 June 2009 and came into effect on 1 August 2009.



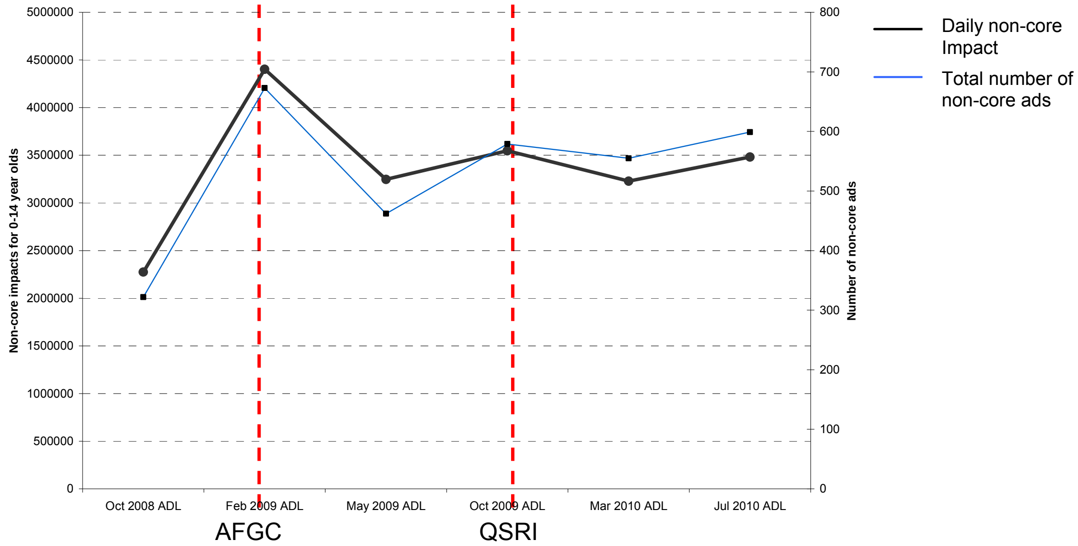
Summary Figure 5: Percentage (%) of children's versus adults' popular programs showing mostly (over 50%) non-core food advertisements for Adelaide free-to-air television.
NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements.
Dashed red line marks the commencement of the respective industry initiatives.

- The absence of non-core food advertisements was noted to be more common during adult popular programs compared to children's popular programs.

What is the impact of non-core food advertising to children?

- Non-core impacts for the study periods were calculated for each half hour time slot on each FTA channel on weekdays and weekends. Audience data was used as a multiplier for the number of non-core advertisements as this provides an indication of the number of children watching for the entire specified time period. Therefore, non-core food impacts are an estimate of the exposure of children to non-core food advertisements broadcast during specific timeslots. A high impact can reflect either a larger audience or a higher number of non-core food advertisements, or a moderate combination of both.

- The impact of non-core food advertising during Adelaide FTA viewing for 0-14 year old children – that is, children's exposure to non-core food advertising– has remained relatively stable and largely reflects the number of non-core advertisements. With the exception of a peak in Feb 2009 the impact of non-core food advertising has remained stable across the six time points considered in this report (Summary Figure 6).



Summary Figure 6: Total daily non-core impacts against the number of non-core advertisements for Adelaide free-to-air across time points between Oct 2008 and July 2010.
NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements.
Dashed red line marks the commencement of the respective industry initiatives.
Impacts = number of non core ads X number of children viewing per day.

- In Adelaide, non-core food impacts were higher during peak viewing hours compared with non-peak viewing hours for both weekdays and weekends. Considering the similarity between the rate of non-core food advertising during peak and non-peak times, this difference was driven by higher audiences during these periods more so than a higher frequency of non-core food advertising.
- Some of the highest ranking programs with child audiences (e.g., "The Biggest Loser") had no non-core food impacts due to a lack of non-core food advertising. This was true at each time point and did not change over time.
- Patterns observed in Whyalla FTA were similar to those seen in Adelaide.

What is the affiliation of the food companies that are advertising?

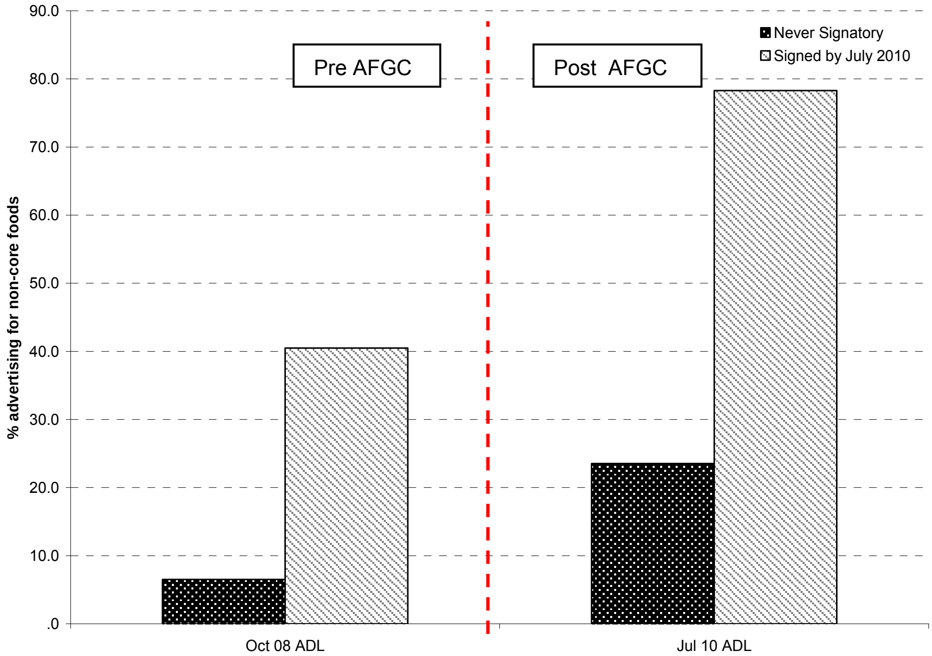
- Food service providers (such as fast food companies) and food manufacturers were the primary food advertisers. In all settings considered, fast food companies were in the top advertisers. McDonalds had the most advertisements on Adelaide FTA and Pay TV while Kellogg's had the highest in the data considered for Whyalla (with McDonalds being second).
- The top advertisers represented a mixture of signatories (12 companies) and non-signatories (8 companies) to self-regulatory initiatives.

Comparison of signatories versus non-signatories to food industry voluntary self-regulatory children's marketing initiatives

AFGC Initiative

- Signatories represent only 40% of food advertising (excluding fast foods) but are responsible for a much higher proportion and number of non-core food advertisements than are non-signatories (78.3% versus 23.5% and 224 ads vs 100 ads in July 2010).

- Since October 2008, the difference in the proportion of food advertising that is for non-core foods appears to have been greater for companies which have not signed the AFGC initiative compared to companies who had signed the initiative by July 2010 (see Summary Figure 7).

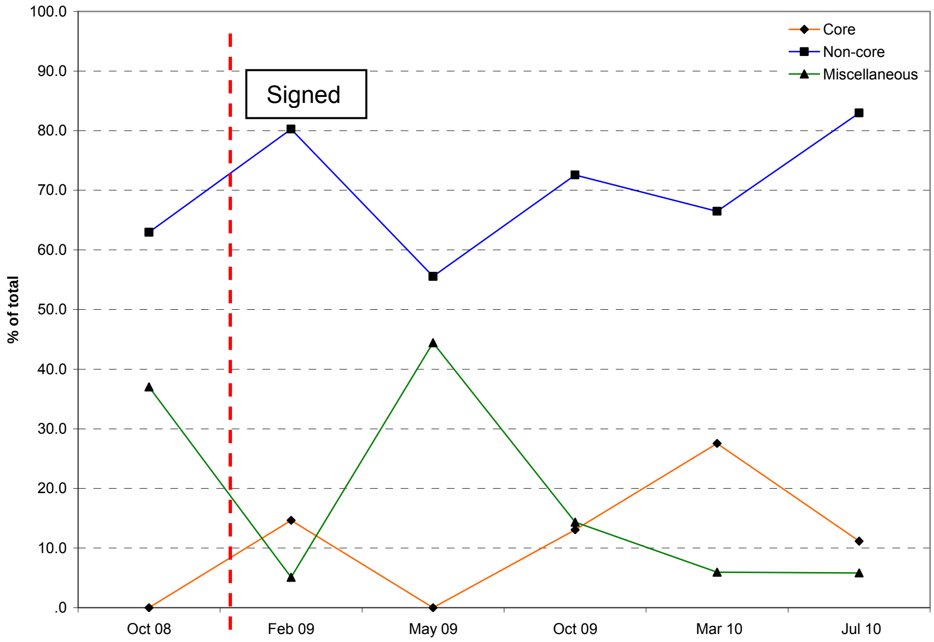


Summary Figure 7: Percentage of total food advertisements that were non-core comparing signatories and non-signatories to the AFGC's children's marketing initiative, in Oct 2008 and Jul 2010 (that is prior to and 18 months post its commencement on 1 January 2009).

NB October 2008 is produced from AC Nielsen data which had fewer advertisements therefore the overall increase is an artefact of differing methods for data collection

- When examining trends over time for companies who signed the initiative at its commencement, there was no consistent pattern of change in the type of foods advertised (see Summary Figure 8). Non-core foods were depicted in 63% of food advertisements in October 2008 and in 55.6–83.0% of advertisements in February 2009 to July 2010. The frequency of non-core food advertising followed a similar pattern to total advertisements.

- Between 0 and 6 non-core food advertisements occurred across all time points during C-classified programs. Signatories advertised some non-core foods (1-2) during C-classified programs but these rates were very low.
- Across food types, nutrition claims were the most common advertising techniques used by both signatories and non-signatories. Premium offers and promotional characters were used at a very low rate.
- Since the initiative, signatories have used all marketing techniques more often to advertise non-core foods than core foods: promotional characters (15.4% non-core vs 10.7% for core); premium offers (17.5% non-core vs 2.4% for core); and nutritional claims (33.1% non-core vs 14.9% for core foods) (Percentages presented for Adelaide FTA).
- There is no clear difference in the use of advertising techniques for non-core foods by signatories and non-signatories from October 2008 to July 2010. Although there was a big drop in the use of nutrition claims for Signatories (from 94.1% to 27.4%), this was likely to be caused by the unusually high application of nutrition claims in the October 2008 data set.



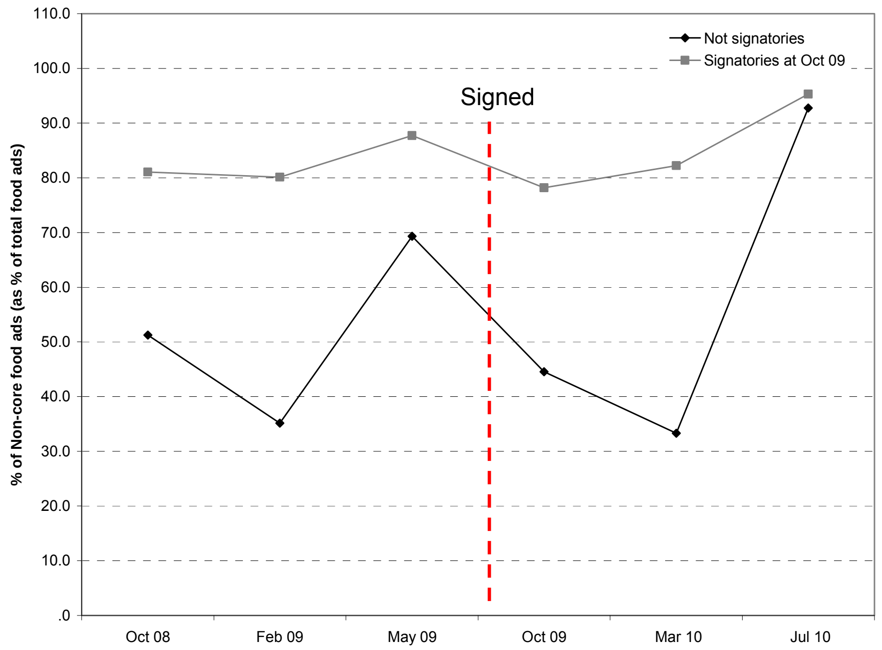
Summary Figure 8: Percentage (%) of total food advertisements that were core, non-core and miscellaneous for signatories to the AFCG initiative as of February 2009.
NB October 2008 and May 2009 are produced from AC Nielsen data which contained fewer advertisements than data from Commercial Monitors.

- The change for use of techniques for companies who signed the initial AFCG initiative also shows no clear patterns over time
    - This data assesses the overall use of advertising techniques without an emphasis on children, and should be interpreted with caution.

AANA QSRI Initiative

- AANA QSRI signatories represent 70% of all fast food advertisers in July 2010.

- The proportion of food advertising that is for non-core items has increased since the AANA initiative was introduced for companies regardless of whether they were a signatory or not (see Summary Figure 9).



Summary Figure 9: Percentage (%) of fast food advertisements for non-core foods by signatories and non-signatories as of August 2009.
NB The spike seen between March and July 2010 was largely driven by a high number of Subway advertisements showing a non-core option

- During C-classified programs, no non-core fast foods were advertised regardless of signatory status.
- Since the QSRI initiative was signed, premium offers have been used to advertise non-core foods (25% of ads by non-signatories, 60.3% by signatories) more than healthy alternatives (0% of ads by non-signatories, 12.1% by signatories) regardless of signatory status. Whereas nutrition claims were used more commonly to advertise healthy alternatives (18.9% by signatories, 18.1% by non-signatories) relative to non-core options (1.7% by signatories, 9.1% by non-signatories).
- The proportion of advertising of non-core options featuring persuasive marketing techniques has remained relatively consistent for non-signatories and signatories to the AANA QSRI initiative.

Conclusion

The impact of non-core food advertising on children has remained consistent since October 2008. Children's programs contain less food advertising than general classified programs (9 and 410 food ads for Children's and General programs respectively in Jul 10 Adelaide FTA). Therefore, impacts may appear stable because most of children's exposure to advertising is occurring when the AFGC and QSR initiatives may not apply. For example, many children are watching programs that are not targeted directly at them which are screened in the adult evening timeslot from 5.30pm to 10 pm (across both weekends and weekdays).

Although signatories to the AFCG self-regulatory initiative represent 40% of all food advertising (excluding fast foods), they are responsible for a much higher proportion and number of the advertisements for non-core foods than are non-signatories (78.3% versus 23.5% and 224 ads vs 100 ads in July 2010), suggesting that changes which they enforce could significantly impact children's non-core food exposure. There was a trend for signatories to the AFCG initiative to have a smaller increase in the proportion of their advertisements that are for non-core food broadcast since October 2008 compared to non-signatories. There were no clear trends for the use of marketing techniques.

Regardless of self-regulatory status, there has been a consistent rise in the rate of fast food advertising from October 2009 to July 2010 (1.34 ads/h to 1.56 ads/h). The current data indicates that this increase has not occurred during C-classified programs (where advertising rates are very low) but in programs classified as G or 'other'. It is unclear how much of this increase involves marketing specifically targeting children. However, the advertising of 'fast foods' is a significant part of all non-core food advertisements (44 to 90%). Therefore any changes in advertising of fast foods are likely to impact children's overall exposure to non-core advertising.

Redefining some of the terms of self-regulatory initiatives to cover a more accurate definition of children's actual viewing times needs consideration to attempt to reduce children's exposure to non-core food advertising.

INTRODUCTION

Behaviours such as eating and physical activity patterns form during childhood and can persist into adolescence and adulthood. Therefore it is important to create environments for children that support the formation of healthy lifestyle habits. Contrary to this goal, national and international literature has shown that the heavy promotion of energy dense, micronutrient and nutrient poor foods and beverages via television advertising is linked to unhealthy eating habits in children. The growing prevalence of childhood overweight and obesity has prompted keen interest in establishing regulations to limit television advertising of unhealthy foods and beverages to children. This would form one of a portfolio of initiatives needed to improve children's eating habits and reduce population levels of overweight and obesity.

Both Australian and international research has demonstrated a broad range of negative impacts of television food marketing in children. Indeed, the World Health Organization's Diet, Nutrition and the Prevention of Chronic Diseases Report (2003) stated that the marketing of unhealthy foods and beverages is a probable causal factor in weight gain and obesity[1,2].

Encouragingly, between 2002 and 2006 in Sydney Australia, there was an overall reduction in both the total number of food and high-fat/high-sugar food advertisements. However, there remained a higher rate of high-fat/high-sugar food advertisements compared to healthier 'core' food advertisements during children's viewing hours, and further still, there were more such advertisements during popular children's programmes[3]. Previous research has also found that advertisements for high-fat/high-sugar foods shown during popular children's programs use more persuasive marketing techniques (such as premium offers, competitions and give-aways) compared to during popular adult programs[4].

Internationally, the Office of Communications (OfCom) in the UK has recently published a report (July 2010) reviewing the effectiveness of restrictions placed on the advertising of products that are high in fat, salt or sugar between 2005 and 2009. They found a 37% reduction in children's exposure to high in fat, salt or sugar food advertising, a drop in the use of persuasive marketing techniques and a significant shift in the balance of advertising towards healthier products[5].

Two self-regulatory initiatives have recently been introduced in Australia; the Australian Food and Grocery Council's (AFGC) Responsible Marketing to Children Initiative (AFGC, which came into effect January 2009) and the Australian Association of National Advertisers' and Quick Service Restaurant Industry's Australian Quick Service Restaurant Industry Initiative For Responsible Advertising And Marketing To Children (referred to as the QSRI, which commenced August 2009) [6-7]. A list of signatory companies is provided in Appendix A.

The AFGC and QSRI Initiative identify core principles and make specific commitments to advertising to children. In the AFGC initiative children are defined as persons under the age of 12 and in the QSRI Initiative children are defined as persons under the age of 14. The commitments cover advertising or marketing directed primarily to children with respect to the theme, visuals and language.

The AFGC Initiative

Signatories commit to not advertising to children unless (1) the products represent healthy choices or (2) the advertising references is in the context of healthy lifestyle messages including good dietary or physical activity habits. Signatories also make a commitment in regards to the use of popular characters and premium offers. Specifically, they commit to not using popular personalities, program or licensed characters unless the advertising complies with (1) and (2) above. Signatories also commit to not advertising premium offers "unless the reference to the premium is merely incidental to the product being advertised" (Responsible Children's Marketing Initiative of the Australian Food and Beverage Council [6]). Signatories commit to not advertise at all during children's programs, which include all pre-school (P) and children's (C) programs, some general (G) programs, and during all programs where more than 50% of the audience is children.

The QSRI Initiative

Similar to the AFGC Initiative, the core principles state that advertising or marketing communications to children for food and beverages must (1) represent healthier choices and/or (2) represent a healthy lifestyle. Amongst other commitments, the signatories to the QSRI initiative commit to is not using popular personalities and licensed characters unless the communication is consistent with the above conditions. Furthermore signatories have a similar disclaimer to the AFGC initiative in regards to premium offers.

Criticism of Self-Regulation

The self-regulatory nature of these initiatives is open to a number of criticisms[8]. These criticisms include that the self-regulation applies to a narrow definition of children's TV viewing that excludes the most popular programs i.e. the programs that large numbers of children watch. Furthermore, regulations apply to advertisements "directed to" or "aimed at" children and therefore susceptible to exemption by clever advertisement design (for example in advertisements that appeal to children but not directed at children). Other issues include the age of children to which the voluntary initiatives apply and importantly the criteria set by industry to define healthy versus unhealthy foods. Finally, self-regulation does not preclude companies from advertising their brand in the absence of specific products.

Independent monitoring of self-regulatory initiatives

A paper by King et al has documented changes in television food advertising patterns by companies who made commitments to the AFGC self-regulatory initiative for Sydney FTA television[9]. The data used consisted of two time points prior to the AFGC initiative (May 2006, May 2007) and one time point post initiative (May 2009). Seasonal variation in advertising patterns was controlled for by sourcing all advertising data in May.

Objectives of the Report

On 8 February 2008, the South Australian Government announced its intention to address concerns about television advertising of unhealthy food and drinks to children. This supported recommendations of the South Australian Parliament's Social Development Committee's 2006 inquiry into fast food and obesity.

In August 2008, the South Australian Minister for Health endorsed the release of a consultation paper: Television advertising and the consumption of unhealthy food and drinks by children. This stated the Government's preference for the advertising and food industries to voluntarily take their own action to restrict advertising of unhealthy food and drinks to children and for national action.

Submissions closed on the 31 October 2008 and 63 submissions were received. During the course of the consultation, the AFGC released its Responsible Children's Marketing Initiative, coming into effect on 1 January 2009, followed in June 2009 by the release of the QSRI, coming into effect on 1 August 2009.

The Minister for Health wrote to the AFGC, the Australian Association of National Advertisers and other submitters to the consultation indicating that he will review the situation in 12 months, allowing time to consider the impact of industry voluntary codes put in place in 2009. SA Health has thus contracted CSIRO to assist them in monitoring the impact of the voluntary codes on South Australian children's exposure to unhealthy food and beverage advertising on television.

The primary objectives of this report are to:

1. Report on the nature and extent of food advertising on free to air (FTA) television in Adelaide, Whyalla, and Pay TV between October 2008 and July 2010,

2. Report on changes in advertising over that period, considering the introduction of voluntary food industry initiatives intended to restrict children's exposure to the advertising of unhealthy foods and beverages.

The report is an extension of the report produced by Physical Activity Nutrition Obesity Research Group (PANORG) at Sydney University that analysed FTA and Pay TV data for a four-day period in February 2009[10,11]. The current report replicates some of the analysis conducted by Sydney University; however, six time points are included in this analysis. The following research questions are answered in this report:

What is the overall pattern of food advertising from 6:00AM to 22:00PM (total number and rate/hour) on weekdays, weekends and in total? At what rate are food products advertised in regional and metropolitan areas?

What is the average audience and reach for Free-To-Air (FTA) television channels for each age demographic (0-12, 0-14, 18+), on weekdays and weekends?

What proportion of food advertisements are for non-core food products?

What types of foods products are advertised (based on the classification of core, non-core and miscellaneous)?

At what rate are advertisements for fast-food restaurants broadcast, and what proportion advertise 'healthy' alternatives?

What marketing techniques (Promotional Offers, Product Endorsement or Nutritional Claims) do food advertisers use to promote food products, and what proportion of food advertisements use these techniques, examined by core and non-core foods?

What is the pattern of food advertising that children aged 0 to 14 years are exposed to:

a) Aged 0 to 14 years on FTA TV?

b) During programs most popular with children compared with those most popular with adults on FTA TV?

c) During C, P and G rated programs?

d) During peak viewing times for children 0 to 4 and 5 to 12 years on Pay TV?

What is the impact of non-core food advertising?

What is the affiliation of the food companies that are advertising – e.g. fast food restaurant, retailer, manufacturer, signatory to AFGC initiative, signatory to AANA QSR Initiative, other?

In relation to signatories to the AFGC Initiative and the QSRI Initiative:

a) What is the pattern of food advertising?

b) What proportion of food advertisements are for core and non-core food products?

c) What marketing techniques are used?

Considering the data above, what changes have there been:

a) From October 2008 until July 2010 for food advertising on FTA television; and in advertising by signatories to the AFGC and QSRI initiatives.

b) From February 2009 until July 2010 for food advertising on Pay TV; and in advertising by signatories to the AFGC and QSRI initiatives.

METHODS

Data

Television advertising

Television advertising data was purchased from two advertising information companies: Commercial Monitors and AC Nielsen (see example advertisements in Appendix F). For Adelaide Metropolitan analyses, six, four-day study periods were utilised (October 2008, February 2009, May 2009, October 2009, March 2010 and July 2010). For Whyalla FTA and Pay TV, only data for the February 2009, March 2010 and July 2010 were collected.

At all time points, television advertisements for food and non-food products between 6:00AM and 22:00PM were used. The four days used included consecutive weekend days and weekdays (Monday and Tuesday) for all data. One of the weekdays from the March 2010 data sample was a public holiday in Adelaide (9th March). For analysis purposes, the 9th of March data has been treated as a normal weekday in this report.

FTA channels included for analysis were 7, 9 and 10 (Adelaide) and CENTRAL and TEN (Whyalla). For Pay TV, the top 5 children's channels were included. Because one of these had no advertisements, the 6^{th} most popular channel was used. The final channels included were: Cartoon Network, Disney, Fox 8, Nickelodeon and Nick Junior.

Initial analyses revealed that there were differences between the number of raw advertisements included in the final databases from AC Nielsen and Commercial Monitors. Firstly, both AC Nielsen datasets (October 2008; May 2009) only included food advertisements. Secondly, the AC Nielsen datasets included up to a third less food advertisements than those provided by Commercial Monitors. It was not clear what methodological differences in capturing advertising may have facilitated this difference.

Audience patterns

Data on Adelaide audience viewing patterns were obtained for 2008 and 2009 from OzTAM. These data included audience and average daily reach information for four different age groups (children 0-12, 5-12 and 0-14 and adults 18+), across weekends, weekdays and overall and for each of the FTA channels in Adelaide (Seven, Nine and Ten).

OzTAM data were used to determine children's peak viewing times, popular programs and 'non-core food impact'. Audience data were only collected for the Adelaide Metropolitan area and these were used in the analysis of Whyalla FTA data.

Coding

All television advertisements were coded according to channel, day (weekday vs. weekend), date, time slot, program name, program classification, children's peak viewing times, advertisement start time and whether the advertisement was for a food product, food company sponsorship (e.g. "This program was brought to you by [food product]…") or a non-food product. Food advertisements (including food company sponsorship advertisements), were further coded for 'food category' (core, non-core and miscellaneous), 'food sub-category' (of which there were 30 - see Appendix B), 'product name and description', 'advertiser', 'brand owner' and the presence of different advertising techniques - 'promotional characters', 'nutrition claims', and 'premium offers'.

The food sub-categories used for the purpose of this research are based on categories developed previously for food advertising research on Sydney FTA television[10-11]. The aim of this categorisation system was to allow the classification of advertised food products into healthy (core) and less healthy (non-core) foods. Other food products that fall outside these categories are classified as miscellaneous (e.g. supermarkets, tea and coffee or dietary supplements). For the purpose of this study, these food categories were adapted to include regular fat dairy products and fruit juice as core foods, as these foods are included as core foods in the Australian Guide to Healthy Eating [12].

Advertisement coding was managed by CSIRO's Data Management Advisor. First-pass coding (advertisement details) was conducted by two project officers and included coding for sort number, product number, setting, date, day, channel, program name, program classification, start time, time slot, peak viewing, Children's Viewing Band (CVB), popular program, advertiser and food or non-food. Second-pass coding (food and beverage advertisements) included coding for product name, product description, food category, food sub-category, brand, company, company description, AFGC's RCMI signatory, QSRI signatory and the three persuasive promotional techniques.

In total, five coders completed the second pass of the data. Coder reliability was tested by a random one hour sample of advertising data coded by each alternate researcher. Reliability was assessed by percentage agreement (a percentage of the sum of advertisements with agreed coding divided by the total number of advertisements). Pairwise comparisons were made between all coders for categories including food/non-food, food category, food subcategory and the three advertising techniques.

Agreement was within acceptable levels for all categories between all coders. Percentage of agreement for the food/non-food category was 97.1 on average between all coders, 96.3 for food category, 94.4 for food subcategory and approximately 98 for each of the advertising techniques. No single pairwise comparison was ≤90% indicating acceptable agreement between each of the coders. Following interrater reliability, a list of additional rules was created to clarify problematic categories (see Appendix E). This list was utilised in subsequent coding.

Coded data for the February 2009 data collection period was provided by PANORG from Sydney University. Some differences in coding methodology were agreed to by SA Health and CSIRO Food and Nutritional Sciences. These included coding general industry advertisements as food advertisements not non-food as they were previously coded. For example: the Meat and Livestock Association (MLA) promoting meat as a food in general and the “Go for 2 & 5” campaign promoting fruits and vegetables. Where changes were made to the protocol used by PANORG, the February 2009 data were adjusted accordingly.

RESULTS

What is the overall pattern of food advertising from 6:00AM to 22:00PM (total number and rate/hour) on weekdays, weekends and in total? At what rate are food products advertised in regional and metropolitan areas?

The total number of non-food, food and food company sponsorships advertisements and the frequency per hour (rate) of all advertisements over the six time points are shown in Table 1 for Adelaide, Table 2 for Whyalla and Table 3 for Pay TV. The absolute difference in the number of advertisements shown on weekdays and weekend days is also shown (WD-WE).

Adelaide FTA

As can be seen in Table 1, the data from AC Nielsen provided no non-food advertisements and therefore the total number of advertisements for October 2008 and May 2009 differed significantly from the other time points. The total number of advertisements for these two time points ranged from 562 to 644, compared to 5495-6192 for the other time points (February and October 2009, and March and July 2010).

For the four time points with a larger number of advertisements captured (February and October 2009, and March and July 2010), 82.1-83.2% were for non-food products, 15.7-17.3% were for food products and 0.6-1.1% were food company sponsorships. The frequency of advertisements per hour was highest for non-food products (23.7-26.8 per hour). The rate of food product advertising ranged from 4.7-5.2 advertisement per hour and for food company sponsorship the rate was less than half an advertisement per hour. Overall, there were between 28.6 and 32.3 advertisements per hour.

There does not appear to be any trend over time in the number, percentage or frequency of non-food, food or food company sponsorship advertisements, with little difference between the 2009 and 2010 time points.

The difference between weekdays and weekend is shown as the absolute difference (WD-WE). In most cases this value is positive meaning there are more advertisements shown on weekdays than weekends. However, for both time points in 2010, the non-food advertisement value is negative, meaning there were more non-food advertisements on weekends than weekdays (-85.0 for March 2010 and -105.0 for July 2010). Overall in July 2010 there were more advertisements on weekend than weekdays.

Table 1: Total number and frequency (rate) per hour of advertisements (non-food, food, food company sponsorship and total) for Adelaide free-to-air television for each time point between Oct 2008 and July 2010

		Adelaide FTA						
		Oct-08†	Feb-09	May-09†	Oct-09	Mar-10	Jul-10	Total
Non-Food	n	-	4718	-	5152	4549	4719	19138
	%	-	82.1	-	83.2	82.8	82.7	78.6
	Freq/h^	-	24.6	-	26.8	23.7	24.6	24.9
	WD-WE*	-	116.0	-	38.0	-85.0	-105.0	-36.0
Food	n	562	992	644	971	909	940	5018
	%	100.0	17.3	100.0	15.7	16.5	16.5	20.6
	Freq/h^	2.9	5.2	3.4	5.1	4.7	4.9	4.4
	WD-WE*	128.0	162.0	-6.0	155.0	91.0	64.0	594.0
Food Company Sponsorship	n	-	36	-	69	37	46	188
	%	-	.6	-	1.1	.7	.8	.8
	Freq/h^	-	.2	-	.4	.2	.2	.3
	WD-WE*	-	2.0	-	27.0	-1.0	.0	28.0
Total	n	562	5746	644	6192	5495	5705	24344
	%	100.0	100.0	100.0	100.0	100.0	100.0	100
	Freq/h^	2.9	29.9	3.4	32.3	28.6	29.7	-
	WD-WE*	128.0	280.0	-6.0	220.0	5.0	-41.0	-

*WD=weekday, WE=weekend day, therefore WD-WE= absolute difference
^Divided by 192 for all days and channels except in the case of “Total” where n is divided again by the number of data points.
†Data collected by AC Nielsen – no non-food ads

Whyalla

For Whyalla, the number and frequency of advertisements per hour is shown in Table 2 over three time points, February 2009, March and July 2010. The total number of advertisements has decreased stepwise from 3900 in February 2009 to 3540 in July 2010. The majority of these advertisements were for non-food products (78.7-85.1%) and 14.9-21.3% of advertisements were for food products. There were very few food company sponsorship advertisements in Whyalla.

As a consequence of the large number of non-food advertisements, the rate of advertising was highest for non-food products (22.5-25.9 advertisements per hour). The rate of advertising for food products ranged from 4.1-6.1 per hour, and overall the rate of total advertisements in Whyalla ranged from 27.7-30.5 ads/hr. Similar to the total number of advertisements, the rate of total advertisements per hour decreased step wise from 30.5 in February 2009, to 28.5 in March 2010, and to 27.7 in July 2010.

At all time points across the food and non-food advertisements (except for food company sponsorship advertisements in July 2010) there were more advertisements shown in weekdays compared to weekend days. The greatest absolute differences were generally observed in February 2009, where 128 more advertisements were shown on weekdays compared to weekend days, however, in July 2010 this difference was still +80.0.

Table 2: Total number and frequency (rate) per hour of advertisements (non-food, food, and food company sponsorship and total) for Whyalla free-to-air television for each time point between Feb 2009 and July 2010

		Whyalla FTA			
		Feb-09	Mar-10	Jul-10	Total
Non-Food	n	3309	2875	3011	9195
	%	84.8	78.7	85.1	82.9
	Freq/h^	25.9	22.5	23.5	23.9
	WD-WE*	41.0	43.0	21.0	105.0
Food	n	581	777	527	1885
	%	14.9	21.3	14.9	17.0
	Freq/h^	4.5	6.1	4.1	4.9
	WD-WE*	85.0	17.0	61.0	163.0
Food Company Sponsorship	n	10	0	2	12
	%	.3	.0	.1	.1
	Freq/h^	.1	.0	.0	.0
	WD-WE*	2.0	.0	-2.0	.0
Total	n	3900	3652	3540	11092
	%	100.0	100.0	100.0	100.0
	Freq/h^	30.5	28.5	27.7	28.9
	WD-WE*	128.0	60.0	80.0	268.0

*WD=weekday, WE=weekend day, therefore WD-WE= absolute difference
^Divided by 128 for all days and channels except in the case of "Total" where n is divided again by the number of data points.

Pay TV

Pay TV had the fewest number of advertisements; the totals ranged from 1313 in February 2009, increasing to 1789 in July 2010. Approximately three quarters of these advertisements were for non-food products (72.2-73.7%), and one quarter for food products (23.4-24.8%). The rate of non-food advertising ranged from 3.0-6.2, and for food products 1.0-2.0 advertisements per hour. Food company sponsorship made up a small proportion of total advertisements (1.8-3.3%). On Pay TV, there was no clear trend as to whether more advertisements were shown on weekdays or weekend days, with the absolute differences (WD-WE) switching between positive and negative values.

Table 3: Total number and frequency (rate) per hour of advertisements (non-food, food, and food company sponsorship and total) for Pay TV for each time point between Feb 2009 and July 2010

		Pay TV			
		Feb-09	Mar-10	Jul-10	Total
Non-Food	n	948	1981	1319	4248
	%	72.2	73.3	73.7	73.2
	Freq/h^	3.0	6.2	4.1	4.4
	WD-WE*	20.0	31.0	-77.0	-26.0
Food	n	325	631	437	1393
	%	24.8	23.4	24.4	24.0
	Freq/h^	1.0	2.0	1.4	1.5
	WD-WE*	-45.0	77.0	7.0	39.0
Food Company Sponsorship	n	40	89	33	162
	%	3.0	3.3	1.8	2.8
	Freq/h^	.1	.3	.1	.2
	WD-WE*	2.0	-9.0	3.0	-4.0
Total	n	1313	2701	1789	5803
	%	100.0	100.0	100.0	100.0
	Freq/h^	4.1	8.4	5.6	6.0
	WD-WE*	-23.0	99.0	-67.0	9.0

*WD=weekday, WE=weekend day, therefore WD-WE= absolute difference
^Divided by 320 for all days and channels except in the case of "Total" where n is divided again by the number of data points.

In Adelaide, the majority of advertisements were for non-food products (82.1-83.2%), and 15.7-17.3% were for food products. The rate of food advertising was 4.4 advertisements per hour compared to about 24.9 for non-food products.

Similar results were observed for Whyalla. Between 14.9 and 21.3% of all advertisements were for food products, and the rate of food advertising was 4.1-6.1 advertisements per hour.

Generally there were more advertisements recorded on weekdays than weekend days.

Unique food advertisements

The above data describes the total number of advertisements however some advertisements are shown many times over a period of time. Table 4 shows the unique number of food advertisements (including food sponsorship) for Adelaide, Whyalla and Pay TV, at each time point. Excluding October 2008 and May 2009, there appears to be a slight increase in the number of unique food advertisements in Adelaide, Whyalla and on Pay TV. In Adelaide in July 2010, there was 343 unique food advertisements observed (in this dataset), compared to in February 2009 when there was 196 unique advertisements. A similar increase was observed for Whyalla with more than double the number of unique advertisement observed in July 2010 compared to February 2009. Taken in association with previous tables that shows that there has not been a clear increase in the total number of advertisements, this indicates that there may be a trend to rely less on repeated plays on the same advertisements or more products to advertise.

Table 4: The total number of unique food advertisements (including food sponsorship) for Adelaide and Whyalla free-to-air television and Pay TV for each time point between Oct 2008 and July 2010..

	October 2008	February 2009	May 2009	October 2009	March 2010	July 2010
Adelaide	95	196	88	213	223	343
Whyalla	-	48	-	-	84	104
Pay TV	-	75	-	-	94	95

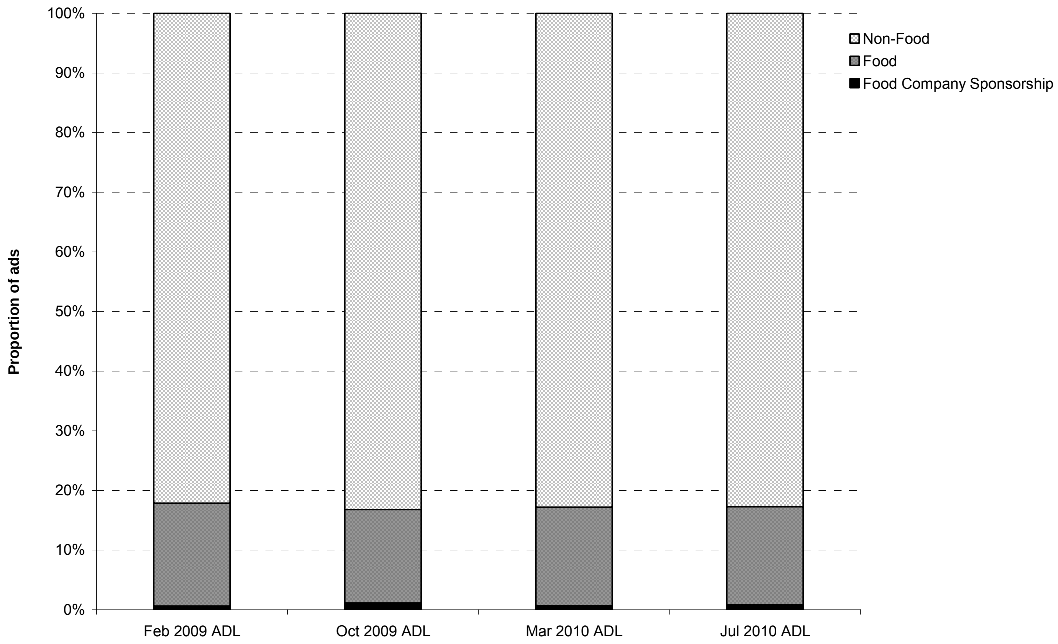


Figure 1: Proportion (%) of food advertisements relative to non-food and food company sponsorship ads for Adelaide free-to-air television for four time points between February 2009 and July 2010 (excludes AC Nielsen data).

What is the average audience and reach for Free-To-Air (FTA) television channels for each age demographic?

Average Daily Audience (AUD) measures the sum of people watching each minute of the show divided by the number of minutes. Average Daily Reach (ADR) measures the absolute number of children watching a minimum of one minute of FTA programming within a specified time frame.

Figure 2 illustrates that AUD and ADR follow a similar pattern across the day although ADR values are higher. Patterns of AUD and ADR are similar in 2008 and 2009. In 2009, values are consistently lower compared to 2008.

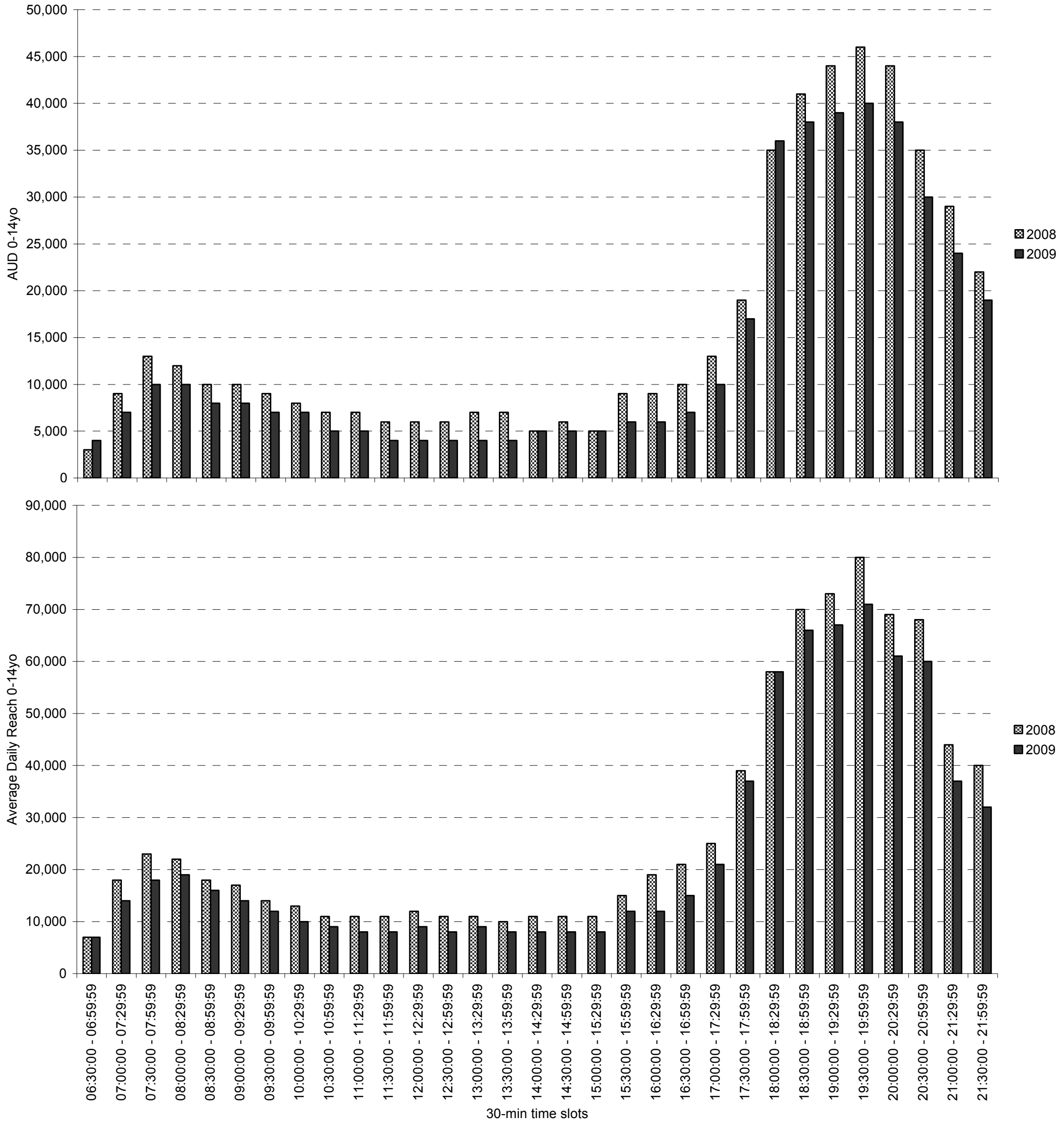


Figure 2: Average Daily Audience (AUD) and Average Daily Reach (ADR) for 0-14 year old children across 30-minute time slots between 0630 and 2200 hours for Adelaide free-to-air television – 2008 and 2009. Calculated using OzTAM data for 2008 and 2009.

Children aged 0 – 14 viewed FTA television more on weekends particularly between 7:00AM and 17:30PM. Viewing patterns were similar in 2008 and 2009 (Figure 3). The child audience peaked at just over 45,000 at 19:30 on weekends and weekdays. There is also an audience peak in the morning at 9:00AM on weekends and 7:30AM on weekdays.

The AFGC's initiative commits to advertising restrictions when more that 50% of the daily audience comprises children. Figure 4 and Figure 5 show that no time slot, weekday or weekend, comprises more than 50% of children aged 0 – 14. In both 2008 and 2009 the proportion of audience aged 0 -14 is greater than 20% between 6:30AM and 10:59PM on weekends.

In 2008 and 2009 Channel 10 was the most popular channel with children of all age groups comprising approximately 40% of the daily audience. Channel 7 was the most popular network for adults (Figure 6).

Figure 6 shows the proportion of audience of 0 – 14 year olds for each of the FTA channels in Adelaide for 2008 and 2009. Channel 10 was the most popular channel in the evenings from 17:00 to 21:30. Channel 7 was the most popular channel in the mornings and early afternoon from 6:30AM (8:00AM in 2008) to 13:30PM.

Free-to-Air television viewing by children aged 0 – 14 was highest on weekends and Channel 10 was the most popular channel with this age group. At no time was the proportion of audience aged 0 – 14 greater than 50% of the total audience, a criteria specified by the AFGC for advertising restrictions.

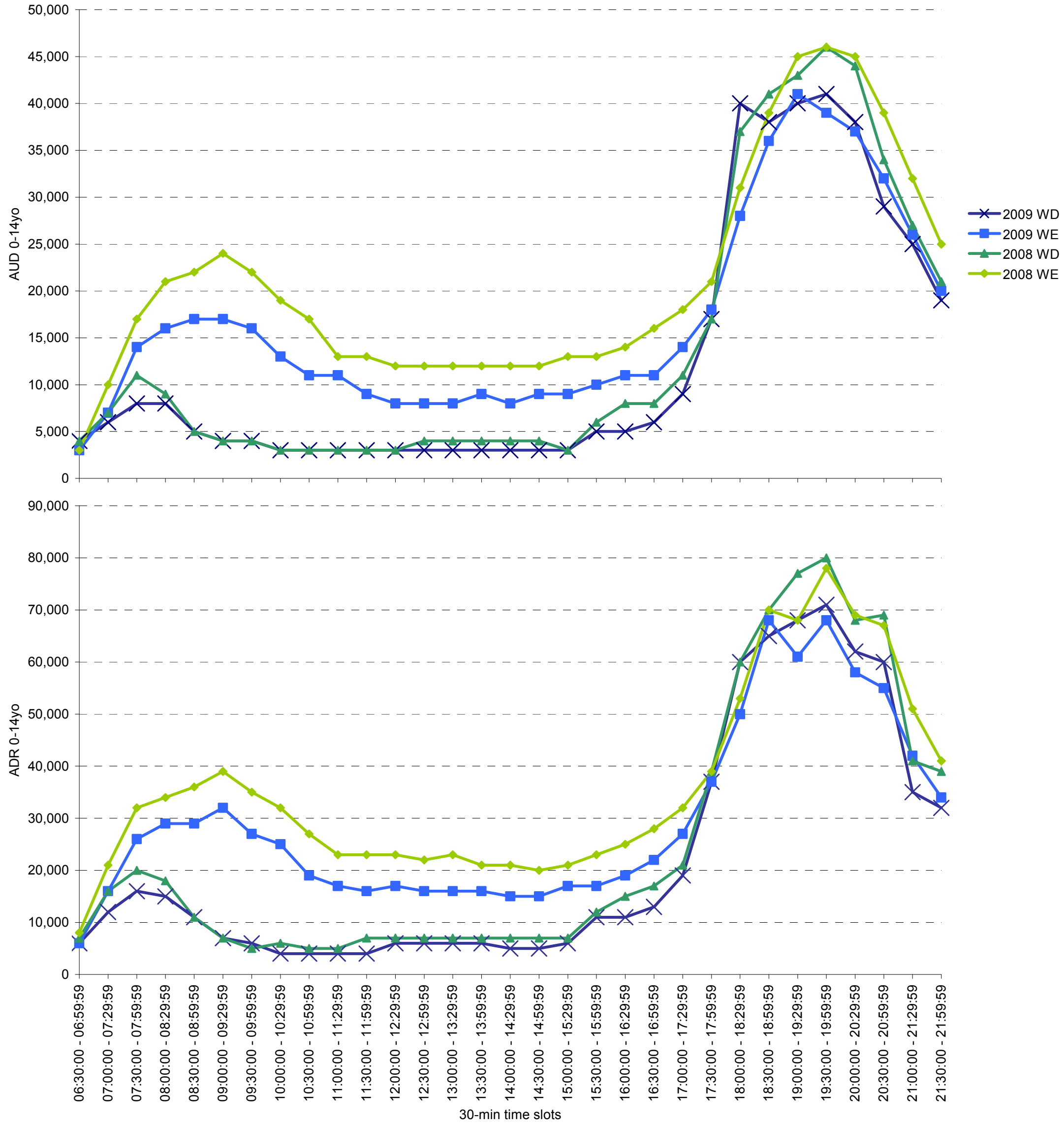


Figure 3: Average Daily Audience (AUD) and Average Daily Reach (ADR) for 0-14 year old children across 30-minute time slots between 0630 and 2200 hours for Adelaide free-to-air television comparing weekends and weekdays – 2008 and 2009. Calculated using OzTAM data for 2008 and 2009.

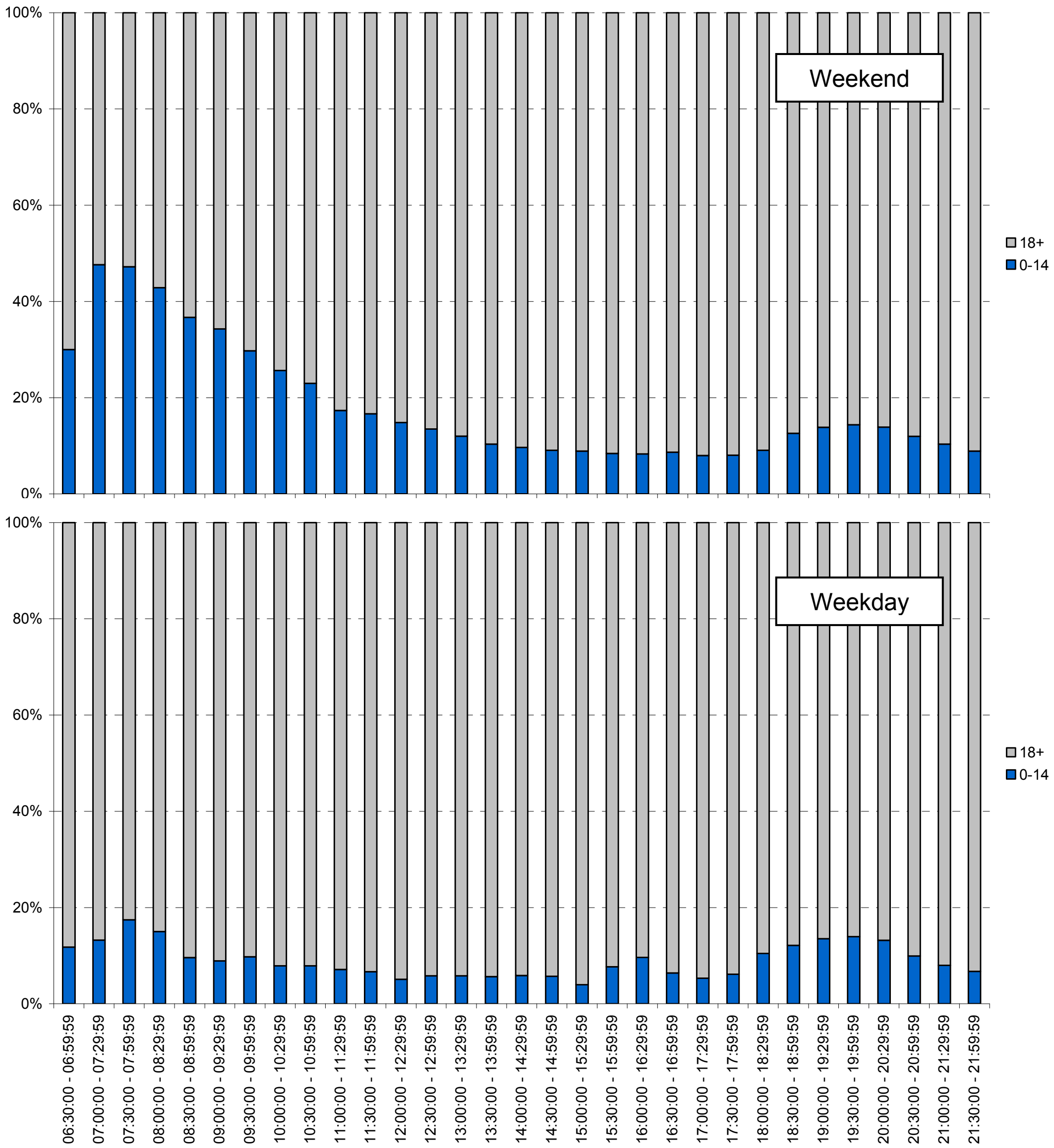


Figure 4: Proportion (%) of Average Daily Audience numbers in 2008 that were 0-14 years of age compared to those 18 and over for Adelaide free-to-air television comparing weekends and weekdays across 30-minute time slots between 0630 and 2200 hours

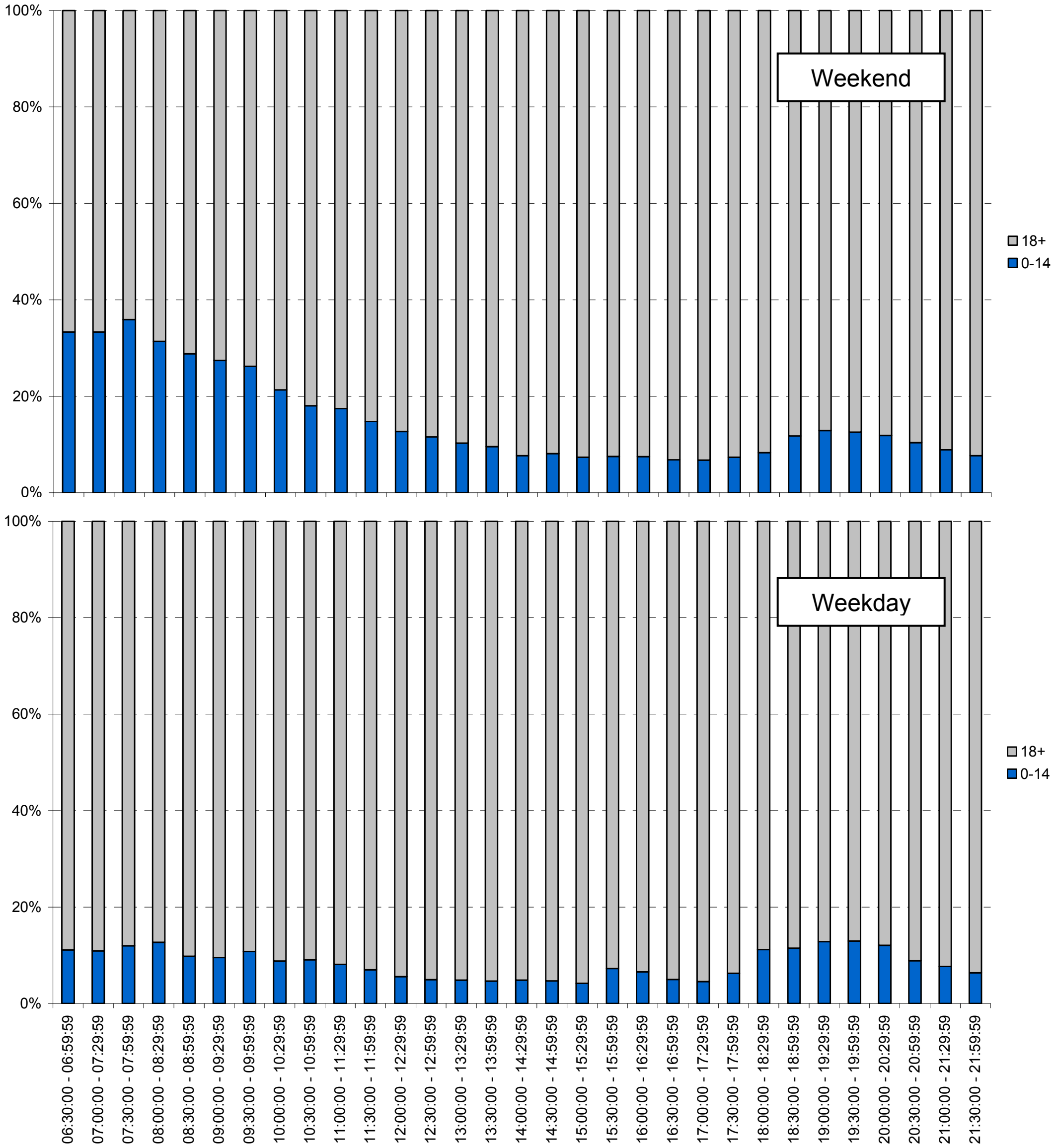


Figure 5: Proportion (%) of Average Daily Audience numbers in 2009 that were 0-14 years of age compared to those 18 years and over for Adelaide free-to-air television comparing weekends and weekdays across 30-minute time slots between 0630 and 2200 hours

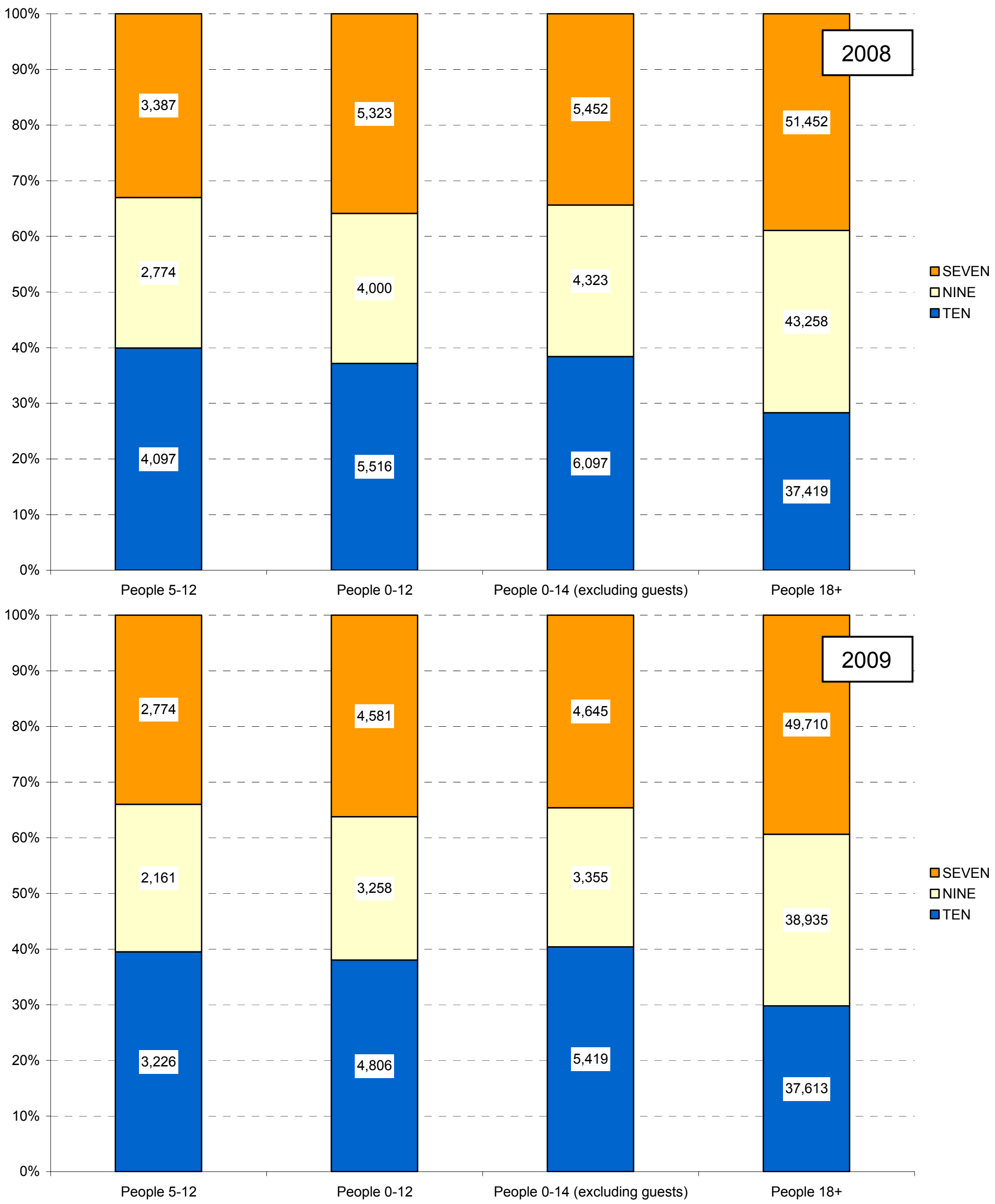


Figure 6: Proportion (%) of Average Daily Audience numbers by channel (Seven, Nine and Ten) for Adelaide free-to-air television for children aged 5-12 years, 0-12 years, and 0-14 years and adults comparing 2008 and 2009.

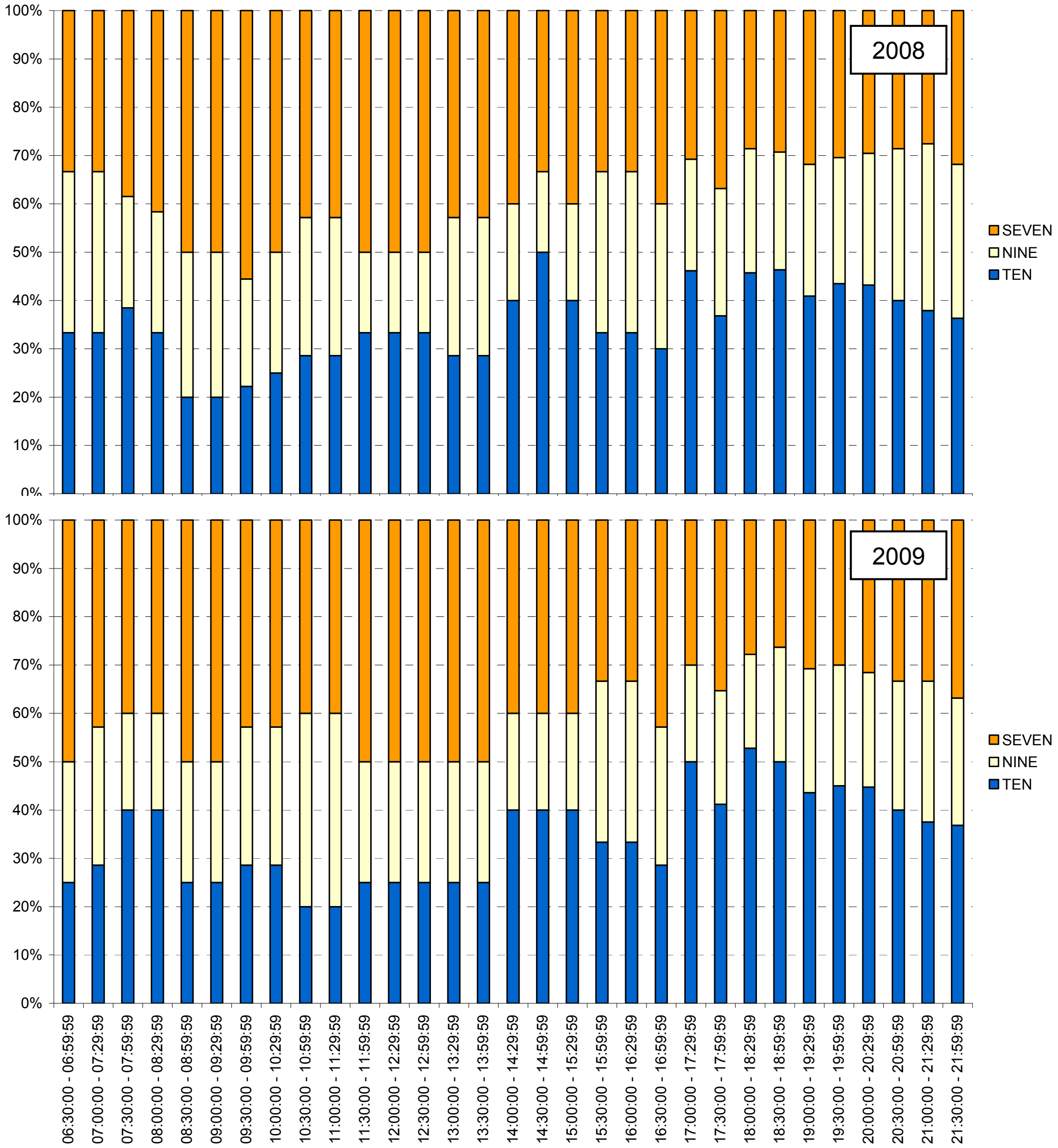


Figure 7: Proportion (%) of Average Daily Audience numbers by station (Seven, Nine and Ten) across 30-minute time slots between 0630 and 2200 hours for children aged 0-14 years using Adelaide free-to-air television data - 2008 and 2009.

WHAT PROPORTION OF FOOD ADVERTISEMENTS ARE FOR NON-CORE FOOD PRODUCTS?

Adelaide FTA

The total number, percentage and rate of advertisements for core, non-core and miscellaneous foods for Adelaide FTA are presented in Table 5. The rate of non-core food (1.7-3.5 ads/hr) advertising is higher than core food (0.2-1.4 ads/hr) advertising. The rate of advertising for core and non-core foods appears to have increased since 2008. However, if AC Nielsen time points are excluded due to differing methodology, any trend is less apparent (Figure 8).

Table 5: Total number (N), percent (%), and frequency (rate) per hour of food advertisements (core, non-core, miscellaneous and total) for Adelaide free-to-air television across time points between Oct 2008 and July 2010 with comparison of weekend (WE) versus weekday (WD).

		Adelaide FTA						
		Oct-08†	Feb-09	May-09†	Oct-09	Mar-10	Jul-10	Total
Core	n	56	170	46	277	250	231	1030
	%	10.0	16.5	7.1	26.6	26.4	23.4	19.8
	Freq/h^	.3	.9	.2	1.4	1.3	1.2	.9
	WD-WE*	-4.0	48.0	-16.0	49.0	68.0	39.0	184.0
Non-core	n	322	673	462	579	555	599	3190
	%	57.3	65.5	71.7	55.7	58.7	60.8	61.3
	Freq/h	1.7	3.5	2.4	3.0	2.9	3.1	2.8
	WD-WE	66.0	59.0	-26.0	49.0	3.0	-7.0	144.0
Miscellaneous	n	184	185	136	184	141	156	986
	%	32.7	18.0	21.1	17.7	14.9	15.8	18.9
	Freq/h	1.0	1.0	.7	1.0	.7	.8	.9
	WD-WE	66.0	57.0	36.0	84.0	19.0	32.0	294.0
Total	n	562	1028	644	1040	946	986	5206
	%	100.0	100.0	100.0	100.0	100.0	100.0	100.0
	Freq/h	2.9	5.4	3.4	5.4	4.9	5.1	4.5
	WD-WE	128	164	-6	182	90	64	622

*WD=weekday, WE=weekend day, therefore WD-WE= absolute difference
^Divided by 192 for all days and channels except in the case of “Total” where n is divided again by the number of data points.
†Data collected by AC Nielsen – fewer-food ads

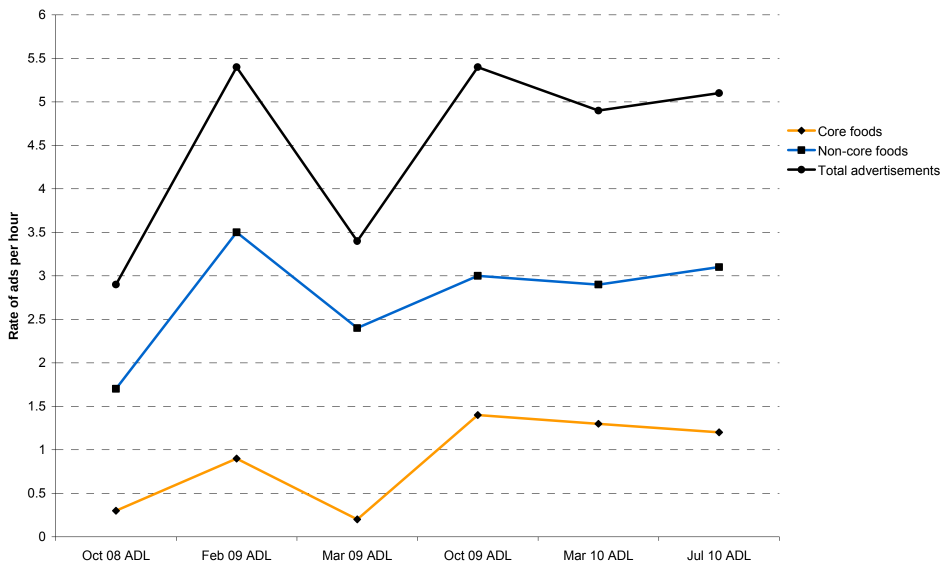


Figure 8: Frequency (rate) per hour of food advertisements for core, non-core and total food advertising across time points between Oct 2008 and July 2010 for Adelaide free-to-air television.
NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements

The majority of food advertisements were for non-core foods. Non-core food advertisements made up between 55.7 and 65.5% of total advertisements and core foods between 7.1 and 26.6% of total advertisements. The proportion of advertisements for non-core foods has remained relatively consistent over the period from October 2008 to July 2010. It is interesting to note that since October 2009 there has been an increase in the proportion of food advertisements for core foods (7.1-16.5% Oct08-May09, 23.4-26.6% Oct09-July10; See Figure 9).

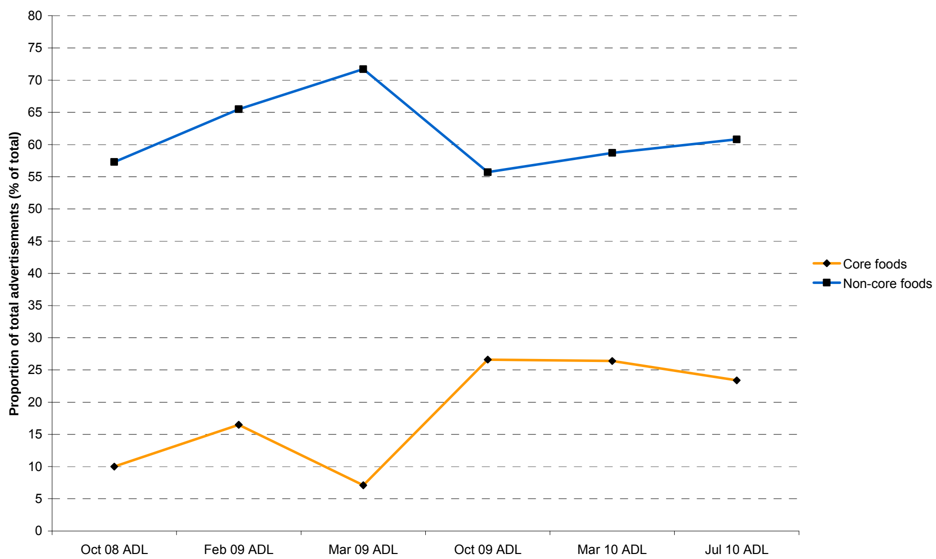


Figure 9: Percentage (%) of total food advertisements as core and non-core across time points between Oct 2008 and July 2010 for Adelaide free-to-air television.
NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements

The total number, percentage and rate per hour of advertisements by channel are shown in Table 6. The proportion of non-core food advertising was highest on Channel 10 with 71.1% of advertisements on average for non-core foods (60.0-84.1%). This is compared to 52.8% for Channel 9 and 56.3% for Channel 7. The rate of non-core food advertising is approximately double that of the other two channels. The rate of non-core food advertising for Channel 10 ranges from 3.0-4.6 ads/hr, compared to 1.0-2.9 for Channel 9 and 1.0-3.6 for Channel 7.

Table 6: Total number (N), percent (%), and frequency (rate) per hour^ of food advertisements (core, non-core, miscellaneous and total) by channel (Nine, Seven and Ten) across time points between Oct 2008 and July 2010 for Adelaide free-to-air television.

			Adelaide FTA						
			Oct-08†	Feb-09	May-09†	Oct-09	Mar-10	Jul-10	Total
NINE	Core	n	16	55	34	92	63	62	322
		%	11.1	19.2	21.0	26.4	26.4	22.6	22.1
		Freq/h	.3	.9	.5	1.4	1.0	1.0	.8
	Non-core	n	62	148	73	186	141	158	768
		%	43.1	51.6	45.1	53.4	59.0	57.7	52.8
		Freq/h	1.0	2.3	1.1	2.9	2.2	2.5	2.0
	Miscellaneous	n	66	84	55	70	35	54	364
		%	45.8	29.3	34.0	20.1	14.6	19.7	25.0
		Freq/h	1.0	1.3	.9	1.1	.5	.8	1.0
	Total	n	144	287	162	348	239	274	1454
		%	100.0	100.0	100.0	100.0	100.0	100.0	100.0
		Freq/h	2.3	4.5	2.5	5.4	3.7	4.3	3.8
SEVEN	Core	n	19	63	6	102	91	95	376
		%	11.7	17.2	3.6	34.7	30.6	25.6	22.7
		Freq/h	.3	1.0	.1	1.6	1.4	1.5	1.0
	Non-core	n	67	233	124	134	168	208	934
		%	41.1	63.5	74.3	45.6	56.6	56.1	56.3
		Freq/h	1.0	3.6	1.9	2.1	2.6	3.3	2.4
	Miscellaneous	n	77	71	37	58	38	68	349
		%	47.2	19.3	22.2	19.7	12.8	18.3	21.0
		Freq/h	1.2	1.1	.6	.9	.6	1.1	.9
	Total	n	163	367	167	294	297	371	1659
		%	100.0	100.0	100.0	100.0	100.0	100.0	100.0
		Freq/h	2.5	5.7	2.6	4.6	4.6	5.8	4.3
TEN	Core	n	21	52	6	83	96	74	332
		%	8.2	13.9	1.9	20.9	23.4	21.7	15.9
		Freq/h	.3	.8	.1	1.3	1.5	1.2	.9
	Non-core	n	193	292	265	259	246	233	1488
		%	75.7	78.1	84.1	65.1	60.0	68.3	71.1
		Freq/h	3.0	4.6	4.1	4.0	3.8	3.6	3.9
	Miscellaneous	n	41	30	44	56	68	34	273
		%	16.1	8.0	14.0	14.1	16.6	10.0	13.0
		Freq/h	.6	.5	.7	.9	1.1	.5	.7
	Total	n	255	374	315	398	410	341	2093
		%	100.0	100.0	100.0	100.0	100.0	100.0	100.0
		Freq/h	4.0	5.8	4.9	6.2	6.4	5.3	5.5

^Divided by 64 for all days except in the case of “Total” where n is divided again by the number of data points.

†Data collected by AC Nielsen – fewer-food ads

The absolute difference between weekdays and weekend days is shown as an absolute difference (WD-WE) in Table 5. In the majority of cases the absolute difference was a positive value, meaning there were more advertisements shown on weekdays than weekend days (in this data set).

On Adelaide and Whyalla FTA and on Pay TV the majority of food advertisements were for non-core foods. In Adelaide, non-core food advertisements made up between 55.7 and 65.5% of total advertisements and core foods between 7.1 and 26.6% of total advertisements.

The proportion of non-core food advertising was highest on Channel 10 with 71.1% of advertisements on average for non-core foods (60.0-84.1%). This is compared to 52.8% for Channel 9 and 56.3% for Channel 7.

Whyalla FTA

The total number, percentage and rate of advertisements for core, non-core and miscellaneous foods for Whyalla FTA is presented in Table 7. The rate of non-core food (2.6-4.2 ads/hr) advertising is higher than core food (0.0-0.7 ads/hr) advertising. The rate of core food advertising has remained consistent and there appears to have been a decrease in the rate of non-core food advertising in July 2010 but it is difficult to determine a trend with only three data points.

Table 7: Total number (N), percent (%), and frequency (rate) per hour^ of food advertisements (core, non-core, miscellaneous and total) across time points between Feb 2009 and July 2010 for Whyalla free-to-air television with comparison of weekend (WE) versus weekday (WD).

		Whyalla FTA			
		Feb-09	Mar-10	Jul-10	Total
Core	n	6	79	89	174
	%	1.0	10.2	16.8	9.2
	Freq/h	.0	.6	.7	.5
	WD-WE*	-2.0	13.0	31.0	42.0
Non-core	n	528	541	332	1401
	%	89.3	69.6	62.8	73.9
	Freq/h	4.1	4.2	2.6	3.6
	WD-WE	84.0	-67.0	-26.0	-9.0
Miscellaneous	n	57	157	108	322
	%	9.6	20.2	20.4	17.0
	Freq/h	.4	1.2	.8	.8
	WD-WE	5.0	71.0	54.0	130.0
Total	n	591	777	529	1897
	%	100.0	100.0	100.0	100.0
	Freq/h	4.6	6.1	4.1	4.9
	WD-WE	87	17	59	163

*WD=weekday, WE=weekend day, therefore WD-WE= absolute difference
^Divided by 128 for all days and channels except in the case of “Total” where n is divided again by the number of data points.

Like Adelaide FTA, the majority of food advertisements are for non-core foods. Non-core food advertisements made up 89.3% of total advertisements in February 2009, and this has decreased to 62.8-69.6% in March-July 2010. The proportion of core food advertisements has increased from 1.0% in February 2009 to 16.8% in July 2010.

The total number, percentage and rate per hour of advertisements by channel in Whyalla are shown in Table 8. The proportion of non-core food advertising was similar between the two channels, 63.3-88.4% for Central and 62.1-90.7% for Southern. The rate of non-core food advertising was similar between the two channels, but at each time point the rate of non-core food advertising on Central was higher than for Southern.

Table 8: Total number (N), percent (%), and frequency (rate) per hour^ of food advertisements (core, non-core, miscellaneous and total) by channel (Central and Southern) across time points between Feb 2009 and July 2010 for Whyalla free-to-air television.

			Whyalla FTA			
			Feb-09	Mar-10	Jul-10	Total
CENTRAL	Core	n	3	59	43	105
		%	.9	12.4	14.9	9.5
		Freq/h	.0	.9	.7	.5
	Non-core	n	305	316	183	804
		%	88.4	66.2	63.3	72.4
		Freq/h	4.8	4.9	2.9	4.2
	Miscellaneous	n	37	102	63	202
		%	10.7	21.4	21.8	18.2
		Freq/h	.6	1.6	1.0	1.1
	Total	n	345	477	289	1111
		%	100.0	100.0	100.0	100.0
		Freq/h	5.4	7.5	4.5	5.8
SOUTHERN	Core	n	3	20	46	69
		%	1.2	6.7	19.2	8.8
		Freq/h	.0	.3	.7	.4
	Non-core	n	223	225	149	597
		%	90.7	75.0	62.1	76.0
		Freq/h	3.5	3.5	2.3	3.1
	Miscellaneous	n	20	55	45	120
		%	8.1	18.3	18.8	15.3
		Freq/h	.3	.9	.7	.6
	Total	n	246	300	240	786
		%	100.0	100.0	100.0	100.0
		Freq/h	3.8	4.7	3.8	4.1

^Divided by 64 for all days and channels except in the case of “Total” where n is divided again by the number of data points.

For Whyalla, the absolute difference values were mostly positive, meaning there were more advertisements shown on weekdays than weekend days.

Pay TV

The total number, percentage and rate of advertisements for core, non-core and miscellaneous foods for Pay TV is presented in Table 9. The rate of food advertising overall on Pay TV was low (1.1-2.3 ads/hr). Despite the low rate overall, at each time point the rate of non-core food advertising (0.8-1.5 ads/hr) was higher than the rate of core food advertising (0.2-0.7 ads/hr). No clear trend is evident in the rate of core or non-core food advertising on Pay TV between February 2009 and July 2010.

Table 9: Total number (N), percent (%), and frequency (rate) per hour^ of food advertisements (core, non-core, miscellaneous and total) across time points between Feb 2009 and July 2010 for Pay TV

		Pay TV			
		Feb-09	Mar-10	Jul-10	Total
Core	n	71	214	69	354
	%	19.5	29.7	14.7	22.8
	Freq/h	.2	.7	.2	.4
	WD-WE	7.0	88.0	15.0	110.0
Non-core	n	261	488	372	1121
	%	71.5	67.8	79.1	72.1
	Freq/h	.8	1.5	1.2	1.2
	WD-WE	-45.0	-22.0	-16.0	-83.0
Miscellaneous	n	33	18	29	80
	%	9.0	2.5	6.2	5.1
	Freq/h	.1	.1	.1	.1
	WD-WE	-5.0	2.0	11.0	8.0
Total	n	365	720	470	1555
	%	100.0	100.0	100.0	100.0
	Freq/h	1.1	2.3	1.5	1.6
	WD-WE	-43	68	10	35

*WD=weekday, WE=weekend day, therefore WD-WE= absolute difference
^Divided by 320 for all days and channels except in the case of "Total" where n is divided again by the number of data points.

Similar to free-to-air television, the majority of food advertisements are for non-core foods (67.8-79.1% of all advertisements). The proportion of core food advertisements ranged from 14.7-29.7%.

The total number, percentage and rate per hour of advertisements by channel in Pay TV are shown in Table 10. There were some notable differences in the proportion of non-core food advertising between the different channels. For example, Nickelodeon Junior had very few advertisements in total and none for non-core foods. Cartoon Network had more advertisements than Nickelodeon Junior and all of them (100%) were for non-core foods. The proportion of advertisements for non-core foods on the other three channels was very similar 68.6-71.4% on average.

Table 10: Total number (N), percent (%), and frequency (rate) per hour^ of food advertisements (core, non-core, miscellaneous and total) by channel (Cartoon Network, Disney, Fox8, Nick Jnr and Nickelodeon) across time points between Feb 2009 and July 2010 for Pay TV.

			Pay TV			
			Feb-09	Mar-10	Jul-10	Total
CARTOON NETWORK	Core	n	0	0	0	0
		%	.0	.0	.0	.0
		Freq/h	.0	.0	.0	.0
	Non-core	n	35	78	42	155
		%	100.0	100.0	100.0	100.0
		Freq/h	.5	1.2	.7	2.4
	Miscellaneous	n	0	0	0	0
		%	.0	.0	.0	.0
		Freq/h	.0	.0	.0	.0
	Total	n	35	78	42	155
		%	100.0	100.0	100.0	100.0
		Freq/h	.5	1.2	.7	.8
DISNEY	Core	n	0	66	0	66
		%	.0	26.1	.0	25.2
		Freq/h	.0	1.0	.0	.3
	Non-core	n	0	178	9	187
		%	.0	70.4	100.0	71.4
		Freq/h	.0	2.8	.1	.3
	Miscellaneous	n	0	9	0	9
		%	.0	3.6	.0	3.4
		Freq/h	.0	.1	.0	.0
	Total	n	0	253	9	262
		%	.0	100.0	100.0	100.0
		Freq/h	.0	4.0	.1	1.4
FOX8	Core	n	37	66	69	172
		%	15.9	26.1	25.0	22.6
		Freq/h	.6	1.0	1.1	.9
	Non-core	n	178	178	185	541
		%	76.4	70.4	67.0	71.0
		Freq/h	2.8	2.8	2.9	2.8
	Miscellaneous	n	18	9	22	49
		%	7.7	3.6	8.0	6.4
		Freq/h	.3	.1	.3	.3
	Total	n	233	253	276	762
		%	100.0	100.0	100.0	100.0
		Freq/h	3.6	4.0	4.3	4.0
NICK JNR	Core	n	7	0	0	7
		%	31.8	.0	.0	24.1
		Freq/h	.1	.0	.0	.0
	Non-core	n	0	0	0	0
		%	.0	.0	.0	.0
		Freq/h	.0	.0	.0	.0
	Miscellaneous	n	15	0	7	22
		%	68.2	.0	100.0	75.9
		Freq/h	.2	.0	.1	.1
	Total	n	22	0	7	29
		%	100.0	.0	100.0	100.0
		Freq/h	.3	.0	.1	.2

NICKELODEON	Core	n	27	82	0	109
		%	36.0	60.3	.0	31.4
		Freq/h	.4	1.3	.0	.6
	Non-core	n	48	54	136	238
		%	64.0	39.7	100.0	68.6
		Freq/h	.8	.8	2.1	1.2
	Miscellaneous	n	0	0	0	0
		%	.0	.0	.0	.0
		Freq/h	.0	.0	.0	.0
	Total	n	75	136	136	347
		%	100.0	100.0	100.0	100.0
		Freq/h	1.2	2.1	2.1	1.8

^Divided by 64 for all days and channels except in the case of "Total" where n is divided again by the number of data points.

Interestingly for Pay TV, the number of core food advertisements was higher on weekdays at all time points, and the number of non-core food advertisements was higher on weekend days for all time points.

What types of food products are advertised (core, non-core and miscellaneous)?

<u>Adelaide FTA</u>

The count and rate of food advertisements for different core, non-core and miscellaneous products on Adelaide FTA are shown in Table 11. Non-core foods were advertised at the highest rates and in particular fast food restaurant advertisements with 1.5 advertisements per hour, more specifically these advertisements were for mostly non-core foods or meals from the fast food restaurants (1.1 ads/hr). These advertisements from fast foods restaurants were for their traditional products and meals and not for their healthy alternatives. Other commonly advertised non-core foods included sugar sweetened drinks (0.27 ads/hr) and chocolate and confectionery (0.25 ads/hr) (Table 11). Overall fast food restaurants advertisements featured more during the week than on weekends. Although the rate of alcohol was low (0.08 ad/hr), alcohol advertisements were more likely to be on weekend than weekdays (Table 12).

The most commonly advertised core foods were dairy products (0.28 ads/hr), followed by combined core foods (0.17 ads/hr) and breads and cereals (0.12 ads/hr). All other core food product categories, such as low sugar breakfast cereals, fruit, vegetables and meat had a rate of about half an advertisement per hour or less. Of the miscellaneous products, vitamin and mineral supplements (0.38 ads/hr) and supermarkets (advertising mostly core foods; 0.21 ads/hr) were most common (Table 11). Combined core foods and dairy products were advertised more on weekdays than weekend days, and vegetables and vegetable products were more likely to be advertised on the weekend; however the rate of advertising for these products was still low. All miscellaneous advertisements featured more on weekdays than weekend days (Table 12).

Non-core foods were advertised at the highest rates (almost 3 advertisements per hour) and in particular fast food restaurants with 1.5 advertisements per hour. Most of these advertisements were for their traditional foods and not for the healthy alternatives.

Fast food advertising makes up a significant proportion of food advertising (25 to 50%) and a large proportion of non-core food advertising (44 to 90%, see Figure 10). Aside from differences between the AC Nielsen and Commercial Monitors data sets, rates of fast food advertising have remained relatively stable. Fast food restaurants were advertised more on weekdays than weekend days.

Sugar sweetened beverages (0.27 ads/hr) and chocolate and confectionery (0.25 ads/hr) were also commonly advertised.

The rate of core food advertising was much lower than non-core foods. The most commonly advertised core foods were dairy products (0.28 ads/hr) followed by combined core foods (0.17 ads/hr) and breads and cereals (0.12 ads/hr). Vitamin and mineral supplements were advertised at a rate of 0.38 ads/hr

Table 11: Number (N) and Frequency (rate) per hour of foods advertisements at the sub food group level for core, non-core and miscellaneous products across time points between Oct 2008 and July 2010 for Adelaide free-to-air television.

	Adelaide FTA													
	Oct-08		Feb-09		May-09		Oct-09		Mar-10		Jul-10		Total	
	n	freq/h	n	freq/h	n	freq/h	n	freq/h	n	freq/h	n	freq/h	n	freq/h
Core and healthy food categories														
Breads, crispbreads, rice, pasta and noodles	12	0.06	8	0.04	0	0.00	47	0.24	35	0.18	40	0.21	142	0.12
Low sugar and high fibre breakfast cereals	0	0.00	16	0.08	0	0.00	16	0.08	30	0.16	30	0.16	92	0.08
Fruits and fruit products without added sugar	0	0.00	0	0.00	0	0.00	22	0.11	14	0.07	0	0.00	36	0.03
Vegetables and vegetable products without added sugar	0	0.00	37	0.19	0	0.00	37	0.19	7	0.04	20	0.10	101	0.09
Plain and flavoured milks, plain and fruit yoghurt, custard, dairy desserts, hard cheese , ricotta and cottages	29	0.15	45	0.23	39	0.20	81	0.42	68	0.35	62	0.32	324	0.28
Meat and meat alternatives	6	0.03	13	0.07	0	0.00	4	0.02	6	0.03	38	0.20	67	0.06
Core foods combined	0	0.00	40	0.21	3	0.02	45	0.23	64	0.33	41	0.21	193	0.17
Baby foods (excluding milk formula)	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00
Bottled water	0	0.00	11	0.06	0	0.00	2	0.01	9	0.05	0	0.00	22	0.02
Fruit juice NAS	9	0.05	0	0.00	4	0.02	23	0.12	17	0.09	0	0.00	53	0.05
Subtotal	56	0.29	170	0.89	46	0.24	277	1.44	250	1.30	231	1.20	1030	0.89
Non-core food categories														
High sugar and/or low fibre breakfast cereals	0	0.00	38	0.20	0	0.00	12	0.06	18	0.09	26	0.14	94	0.08
Crumbed or battered meat and meat alternatives and high fat frozen meals	0	0.00	9	0.05	0	0.00	24	0.13	37	0.19	10	0.05	80	0.07
Cakes, muffins, sweet biscuits, high fat savoury biscuits, pies and pastries	0	0.00	8	0.04	10	0.05	14	0.07	20	0.10	30	0.16	82	0.07
Snack foods such as chips, high fat crackers, snack bars, muesli bars	0	0.00	29	0.15	0	0.00	69	0.36	31	0.16	39	0.20	168	0.15
Frozen/fried potato products	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	26	0.14	26	0.02
Dairy desserts, and high salt cheese	0	0.00	0	0.00	0	0.00	6	0.03	0	0.00	0	0.00	6	0.01
Ice cream and iced confection	2	0.01	54	0.28	0	0.00	11	0.06	4	0.02	0	0.00	71	0.06

Chocolate and confectionery	0	0.00	25	0.13	0	0.00	82	0.43	75	0.39	100	0.52	282	0.25
Fast food restaurants or meals (mostly Non-Core foods)	199	1.04	206	1.07	270	1.41	170	0.89	165	0.86	260	1.35	1270	1.10
Fast food restaurants or meals (Non-Specified or Unclear)	58	0.30	135	0.70	65	0.34	76	0.40	19	0.10	15	0.08	368	0.32
Fast food restaurants or meals (mostly 'healthy' alternatives)	33	0.17	39	0.20	7	0.04	11	0.06	63	0.33	0	0.00	153	0.13
Total fast food	290	1.51	380	1.98	342	1.78	257	1.34	247	1.29	275	1.43	1791	1.56
High fat, sugar, salt spreads, oils, high fat savoury sauces, meal helpers (stocks, tomato paste) and soups	0	0.00	30	0.16	0	0.00	27	0.14	43	0.22	54	0.28	154	0.13
Sugar sweetened drinks	23	0.12	95	0.49	42	0.22	63	0.33	69	0.36	18	0.09	310	0.27
Alcohol	7	0.04	5	0.03	32	0.17	14	0.07	11	0.06	21	0.11	90	0.08
Subtotal	322	1.68	673	3.51	426	2.22	579	3.02	555	2.89	599	3.12	3154	2.74
Miscellaneous														
Vitamin and mineral supplements	111	0.58	81	0.42	70	0.36	41	0.21	79	0.41	55	0.29	437	0.38
Tea and coffee	10	0.05	8	0.04	20	0.10	39	0.20	30	0.16	21	0.11	128	0.11
Supermarkets (mostly non-core foods)	9	0.05	2	0.01	30	0.16	29	0.15	0	0.00	12	0.06	82	0.07
Supermarkets (mostly core foods)	52	0.27	70	0.36	0	0.00	41	0.21	32	0.17	44	0.23	239	0.21
Supermarkets (generic supermarket ads or not clear for core or non-core)	2	0.01	11	0.06	52	0.27	25	0.13	0	0.00	16	0.08	106	0.09
Baby and toddler milk formulae	0	0.00	13	0.07	0	0.00	9	0.05	0	0.00	8	0.04	30	0.03
Subtotal	184	0.96	185	0.96	172	0.90	184	0.96	141	0.73	156	0.81	1022	0.89

^Divided by 192 for all days and channels except in the case of "Total" where n is divided again by the number of data points.
†Data collected by AC Nielsen – fewer-food ads

Table 12: Absolute difference in the number of foods advertisements screened on weekdays versus weekends (WD-WE) at the sub food group level for core, non-core and miscellaneous products across time points between Oct 2008 and July 2010 for Adelaide free-to-air television.

	Adelaide FTA						
	Oct-08	Feb-09	May-09	Oct-09	Mar-10	Jul-10	Total
Core and healthy food categories							
Breads, crispbreads, rice, pasta and noodles	-2	-2	0	-9	7	-6	-12
Low sugar and high fibre breakfast cereals	0	-2	0	2	-4	2	-2
Fruits and fruit products without added sugar	0	0	0	14	-4	0	10
Vegetables and vegetable products without added sugar	0	-26	0	-17	7	-9	-45
Plain and flavoured milks, plain and fruit yoghurt, custard, dairy desserts, hard cheese , ricotta and cottages	3	7	-17	29	22	6	50
Meat and meat alternatives	-2	-3	0	2	-4	6	-1
Core foods combined	0	38	1	23	38	33	133
Baby foods (excluding milk formula)	0	0	0	0	0	0	0
Bottled water	0	-5	0	2	5	0	2
Fruit juice NAS	-3	0	0	-19	11	0	-11
Subtotal	-4	48	-16	49	68	39	184
Non-core food categories							
High sugar and/or low fibre breakfast cereals	0	12	0	6	2	18	38
Crumbed or battered meat and meat alternatives and high fat frozen meals	0	-7	0	12	-7	6	4
Cakes, muffins, sweet biscuits, high fat savoury biscuits, pies and pastries	0	0	-8	10	2	-2	2
Snack foods such as chips, high fat crackers, snack bars, muesli bars	0	3	0	9	-1	19	30
Frozen/fried potato products	0	0	0	0	0	2	2
Dairy desserts, and high salt cheese	0	0	0	4	0	0	4
Ice cream and iced confection	-2	2	0	1	0	0	1
Chocolate and confectionery	0	1	0	-16	-17	2	-30
Fast food restaurants or meals (mostly Non-Core foods)	1	-16	-6	-34	33	-48	-70
Fast food restaurants or meals (Non-Specified or Unclear)	46	65	-1	40	-5	-9	136
Fast food restaurants or meals (mostly ‘healthy’ alternatives)	23	-3	3	9	7	0	39
Total fast food	70	46	-4	15	35	-57	105
High fat, sugar, salt spreads, oils, high fat savoury sauces, meal helpers (stocks, tomato paste) and soups	0	16	0	9	7	24	56
Sugar sweetened drinks	-3	-9	-6	9	-13	2	-20
Alcohol	1	-5	-24	-10	-5	-21	-64
Subtotal	66	59	-42	49	3	-7	128
Miscellaneous							
Vitamin and mineral supplements	31	29	28	21	5	11	125
Tea and coffee	2	6	2	5	0	11	26
Supermarkets (mostly non-core foods)	7	-2	12	21	0	4	42
Supermarkets (mostly core foods)	26	10	0	9	14	-8	51
Supermarkets (generic supermarket ads or not clear for core or non-core)	0	3	10	21	0	10	44
Baby and toddler milk formulae	0	11	0	7	0	4	22
Subtotal	66	57	52	84	19	32	310

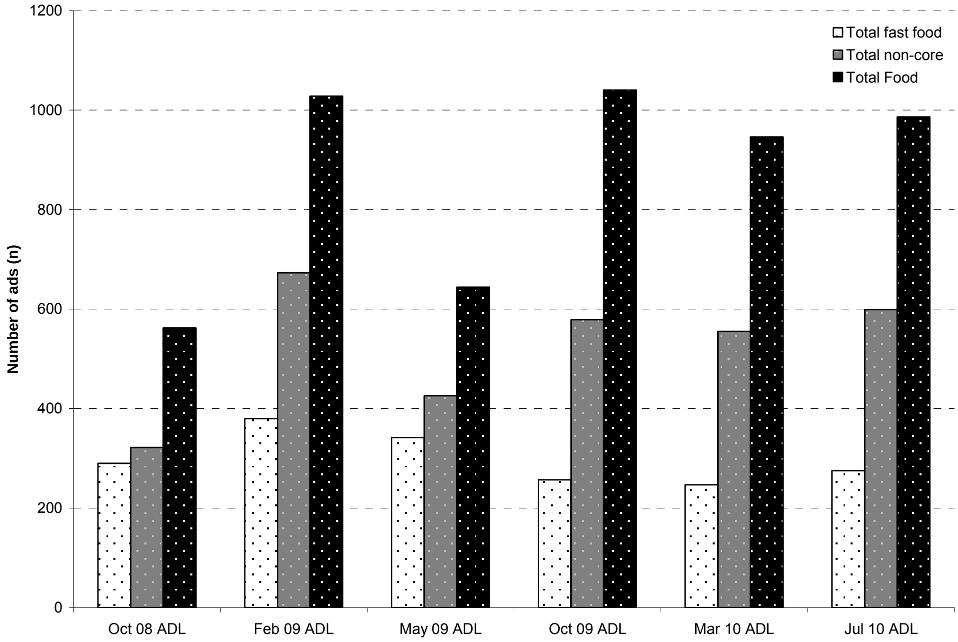


Figure 10: Number (N) of advertisements for all foods, non-core foods and fast foods across each time between Oct 2008 and July 2010 for Adelaide free-to-air television. *NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements*

Whyalla FTA

The count and rate of food advertisements for different core, non-core and miscellaneous products on Whyalla FTA are shown in Table 13. The total rate of advertising was highest for fast foods (1.67 ads/hr) and these were mainly for their non-core foods and meals (1.02 ads/hr). Other non-core foods commonly advertised included high sugar and/or low fibre breakfast cereals (0.63 ads/hr), chocolate and confectionery (0.41 ads/hr), savoury snack foods such as chips, cracker biscuits, snack and muesli bars (0.36 ads/hr) and high fat high sugar spread, sauces and soups (0.34 ads/hr).

The rate of core food advertising was low in Whyalla. Breads and cereal products were most advertised at a rate of 0.18 ads/hr followed by dairy foods at 0.14 ads/hr. Of the miscellaneous products, vitamin and mineral supplements (0.43 ads/hr) were most commonly advertised. Core foods, in particular breads and cereal products, and vitamin and mineral supplements were advertised more on weekdays than weekends, whereas fast food restaurants and high fat high sugar spread, sauces and soups were advertised more on weekend days (Table 14).

Table 13: Number (N) and Frequency (rate) per hour of foods advertisements at the sub food group level for core, non-core and miscellaneous products across time points between Feb 2009 and July 2010 for Whyalla free-to-air television

	Whyalla FTA							
	Feb-09		Mar-10		Jul-10		Total	
	n	freq/h	n	freq/h	n	freq/h	n	freq/h
Core and healthy food categories								
Breads, crispbreads, rice, pasta and noodles	0	0.00	7	0.05	64	0.50	71	0.18
Low sugar and high fibre breakfast cereals	6	0.05	4	0.03	16	0.13	26	0.07
Fruits and fruit products without added sugar	0	0.00	5	0.04	0	0.00	5	0.01
Vegetables and vegetable products without added sugar	0	0.00	0	0.00	0	0.00	0	0.00
Plain and flavoured milks, plain and fruit yoghurt, custard, dairy desserts, hard cheese , ricotta and cottages	0	0.00	47	0.37	6	0.05	53	0.14
Meat and meat alternatives	0	0.00	5	0.04	3	0.02	8	0.02
Core foods combined	0	0.00	0	0.00	0	0.00	0	0.00
Baby foods (excluding milk formula)	0	0.00	0	0.00	0	0.00	0	0.00
Bottled water	0	0.00	0	0.00	0	0.00	0	0.00
Fruit juice NAS	0	0.00	11	0.09	0	0.00	11	0.03
Subtotal	6	0.05	79	0.62	89	0.70	174	0.45
Non-core food categories								
High sugar and/or low fibre breakfast cereals	142	1.11	92	0.72	6	0.05	240	0.63
Crumbed or battered meat and meat alternatives and high fat frozen meals	0	0.00	0	0.00	0	0.00	0	0.00
Cakes, muffins, sweet biscuits, high fat savoury biscuits, pies and pastries	0	0.00	45	0.35	1	0.01	46	0.12
Snack foods such as chips, high fat crackers, snack bars, muesli bars	28	0.22	66	0.52	44	0.34	138	0.36
Frozen/fried potato products	0	0.00	0	0.00	0	0.00	0	0.00
Dairy desserts, and high salt cheese	0	0.00	0	0.00	0	0.00	0	0.00
Ice cream and iced confection	28	0.22	0	0.00	0	0.00	28	0.07
Chocolate and confectionery	29	0.23	64	0.50	64	0.50	157	0.41
Fast food restaurants or meals (mostly Non-Core foods)	87	0.68	137	1.07	169	1.32	393	1.02
Fast food restaurants or meals (Non-Specified or Unclear)	92	0.72	8	0.06	16	0.13	116	0.30
Fast food restaurants or meals (mostly ‘healthy’ alternatives)	13	0.10	40	0.31	24	0.19	77	0.20
Total fast food	192	2	185	1	209	2	586	1.67
High fat, sugar, salt spreads, oils, high fat savoury sauces, meal helpers (stocks, tomato paste) and soups	72	0.56	54	0.42	3	0.02	129	0.34
Sugar sweetened drinks	32	0.25	35	0.27	0	0.00	67	0.17
Alcohol	5	0.04	0	0.00	5	0.04	10	0.03
Subtotal	528	4.13	541	4.23	332	2.59	1401	3.65
Miscellaneous								
Vitamin and mineral supplements	1	0.01	119	0.93	44	0.34	164	0.43
Tea and coffee	0	0.00	0	0.00	12	0.09	12	0.03
Supermarkets (mostly non-core foods)	11	0.09	0	0.00	0	0.00	11	0.03
Supermarkets (mostly core foods)	6	0.05	38	0.30	35	0.27	79	0.21
Supermarkets (generic supermarket ads or not clear for core or non-core)	39	0.30	0	0.00	17	0.13	56	0.15
Baby and toddler milk formulae	0	0.00	0	0.00	0	0.00	0	0.00
Subtotal	57	0.45	157	1.23	108	0.84	322	0.84

^Divided by 128 for all days and channels except in the case of “Total” where n is divided again by the number of data points.

Table 14: Absolute difference in the number of foods advertisements screened on weekdays versus weekends (WD-WE) at the sub food group level for core, non-core and miscellaneous products across time points between Feb 2009 and July 2010 for Whyalla free-to-air television.

	Whyalla FTA			
	Feb-09	Mar-10	Jul-10	Total
Core and healthy food categories				
Breads, crispbreads, rice, pasta and noodles	0	3	30	33
Low sugar and high fibre breakfast cereals	-2	4	6	8
Fruits and fruit products without added sugar	0	-5	0	-5
Vegetables and vegetable products without added sugar	0	0	0	0
Plain and flavoured milks, plain and fruit yoghurt, custard, dairy desserts, hard cheese , ricotta and cottages	0	21	-2	19
Meat and meat alternatives	0	1	-3	-2
Core foods combined	0	0	0	0
Baby foods (excluding milk formula)	0	1	2	3
Bottled water	0	0	0	0
Fruit juice NAS	0	-11	0	-11
Subtotal	-2	13	31	42
Non-core food categories				
High sugar and/or low fibre breakfast cereals	26	-10	6	22
Crumbed or battered meat and meat alternatives and high fat frozen meals	0	0	0	0
Cakes, muffins, sweet biscuits, high fat savoury biscuits, pies and pastries	0	17	-1	16
Snack foods such as chips, high fat crackers, snack bars, muesli bars	16	-4	20	32
Frozen/fried potato products	0	0	0	0
Dairy desserts, and high salt cheese	0	0	0	0
Ice cream and iced confection	-2	0	0	-2
Chocolate and confectionery	21	-22	34	33
Fast food restaurants or meals (mostly Non-Core foods)	1	21	-45	-23
Fast food restaurants or meals (Non-Specified or Unclear)	22	4	-8	18
Fast food restaurants or meals (mostly 'healthy' alternatives)	-9	-18	-24	-51
Total fast food	14	7	-77	-56
High fat, sugar, salt spreads, oils, high fat savoury sauces, meal helpers (stocks, tomato paste) and soups	-14	-54	-3	-71
Sugar sweetened drinks	20	-1	0	19
Alcohol	3	0	-5	-2
Subtotal	84	-67	-26	-9
Miscellaneous				
Vitamin and mineral supplements	1	85	30	116
Tea and coffee	0	0	8	8
Supermarkets (mostly non-core foods)	1	0	0	1
Supermarkets (mostly core foods)	5	0	3	8
Supermarkets (generic supermarket ads or not clear for core or non-core)	5	0	3	8
Baby and toddler milk formulae	0	0	0	0
Subtotal	5	71	54	130

Pay TV

The count and rate of food advertisements for different core, non-core and miscellaneous products on Pay TV are shown in Table 15. The rate of advertising was lower for all food categories on Pay TV. Fast food restaurants were the most frequently advertised (0.48 ads/hr), in particular advertisements for most non-core foods and meals (0.19 ads/hr). This was followed by chocolate and confectionery (0.14 ads/hr), high sugar and/or low fibre breakfast cereals (0.10 ads/hr) and cakes and sweet biscuits (0.10 ads/hr), although the rates for all these non-core food products was generally low.

Low sugar and/or high fibre cereal (0.20 ads/hr) was the most advertised core food product types. Miscellaneous products were not advertised frequently on Pay TV. Core foods were generally advertised more on weekdays than weekend days, compared with fast food which was advertised more on the weekends (Table 16).

On Whyalla FTA and Pay TV fast food restaurants were the most commonly advertised non-core food, and had the highest rate of advertising of all food products. Advertising on Pay TV overall was lower than on both Adelaide and Whyalla FTA.

Table 15: Number (N) and Frequency (rate) per hour of foods advertisements at the sub food group level for core, non-core and miscellaneous products across time points between Feb 2009 and July 2010 for Pay TV

	Pay TV							
	Feb-09		Mar-10		Jul-10		Total	
	n	freq/h^	n	freq/h	n	freq/h	n	freq/h
Core and healthy food categories								
Breads, crispbreads, rice, pasta and noodles	0	0.00	42	0.13	12	0.04	54	0.06
Low sugar and high fibre breakfast cereals	64	0.20	114	0.36	15	0.05	193	0.20
Fruits and fruit products without added sugar	0	0.00	8	0.03	0	0.00	8	0.01
Vegetables and vegetable products without added sugar	0	0.00	4	0.01	11	0.03	15	0.02
Plain and flavoured milks, plain and fruit yoghurt, custard, dairy desserts, hard cheese , ricotta and cottages	7	0.02	18	0.06	14	0.04	39	0.04
Meat and meat alternatives	0	0.00	12	0.04	2	0.01	14	0.01
Core foods combined	0	0.00	0	0.00	9	0.03	9	0.01
Baby foods (excluding milk formula)		0.00		0.00		0.00		0.00
Bottled water	0	0.00	2	0.01	0	0.00	2	0.00
Fruit juice NAS	0	0.00	14	0.04	6	0.02	20	0.02
Subtotal	71	0.22	214	0.67	69	0.22	354	0.37
Non-core food categories								
High sugar and/or low fibre breakfast cereals	50	0.16	36	0.11	13	0.04	99	0.10
Crumbed or battered meat and meat alternatives and high fat frozen meals	2	0.01	8	0.03	4	0.01	14	0.01
Cakes, muffins, sweet biscuits, high fat savoury biscuits, pies and pastries	0	0.00	0	0.00	99	0.31	99	0.10
Snack foods such as chips, high fat crackers, snack bars, muesli bars	10	0.03	16	0.05	28	0.09	54	0.06
Frozen/fried potato products	0	0.00	0	0.00	4	0.01	4	0.00
Dairy desserts, and high salt cheese	13	0.04	0	0.00	0	0.00	13	0.01
Ice cream and iced confection	7	0.02	4	0.01	0	0.00	11	0.01
Chocolate and confectionery	4	0.01	87	0.27	47	0.15	138	0.14
Fast food restaurants or meals (mostly Non-Core foods)	42	0.13	118	0.37	22	0.07	182	0.19
Fast food restaurants or meals (Non-Specified or Unclear)	28	0.09	115	0.36	15	0.05	158	0.16
Fast food restaurants or meals (mostly 'healthy' alternatives)	56	0.18	16	0.05	52	0.16	124	0.13
Total fast food	126	0.39	249	0.78	89	0.28	464	0.48
High fat, sugar, salt spreads, oils, high fat savoury sauces, meal helpers (stocks, tomato paste) and soups	0	0.00	46	0.14	43	0.13	89	0.09
Sugar sweetened drinks	32	0.10	26	0.08	43	0.13	101	0.11
Alcohol	17	0.05	16	0.05	2	0.01	35	0.04
Subtotal	261	0.82	488	1.53	372	1.16	1121	1.17
Miscellaneous								
Vitamin and mineral supplements	12	0.04	18	0.06	13	0.04	43	0.04
Tea and coffee	2	0.01	0	0.00	0	0.00	2	0.00
Supermarkets (mostly non-core foods)		0.00		0.00		0.00		0.00
Supermarkets (mostly core foods)		0.00		0.00		0.00		0.00
Supermarkets (generic supermarket ads or not clear for core or non-core)	0	0.00	0	0.00	5	0.02	5	0.01
Baby and toddler milk formulae	19	0.06	0	0.00	11	0.03	30	0.03
Subtotal	33	0.10	18	0.06	29	0.09	80	0.08

^Divided by 320 except in the case of "Total" where n is divided again by the number of data points.

Table 16: Absolute difference in the number of foods advertisements screened on weekdays versus weekends (WD-WE) at the sub food group level for core, non-core and miscellaneous products across time points between Feb 2009 and July 2010 for Whyalla free-to-air television.

	Pay TV			
	Feb-09	Mar-10	Jul-10	Total
Core and healthy food categories				
Breads, crispbreads, rice, pasta and noodles	0	26	2	28
Low sugar and high fibre breakfast cereals	10	36	3	49
Fruits and fruit products without added sugar	0	0	0	0
Vegetables and vegetable products without added sugar	0	-4	7	3
Plain and flavoured milks, plain and fruit yoghurt, custard, dairy desserts, hard cheese , ricotta and cottages	-3	18	-4	11
Meat and meat alternatives	0	4	2	6
Core foods combined	0	0	5	5
Baby foods (excluding milk formula)	0	1	2	3
Bottled water	0	-2	0	-2
Fruit juice NAS	0	10	0	10
Subtotal	7	88	15	110
Non-core food categories				
High sugar and/or low fibre breakfast cereals	-12	2	-7	-17
Crumbed or battered meat and meat alternatives and high fat frozen meals	0	0	-4	-4
Cakes, muffins, sweet biscuits, high fat savoury biscuits, pies and pastries	0	0	-1	-1
Snack foods such as chips, high fat crackers, snack bars, muesli bars	2	-4	6	4
Frozen/fried potato products	0	0	4	4
Dairy desserts, and high salt cheese	-1	0	0	-1
Ice cream and iced confection	-7	-4	0	-11
Chocolate and confectionery	0	3	-3	0
Fast food restaurants or meals (mostly Non-Core foods)	-10	6	2	-2
Fast food restaurants or meals (Non-Specified or Unclear)	6	-37	1	-30
Fast food restaurants or meals (mostly 'healthy' alternatives)	-16	12	-2	-6
Total fast food	-20	-19	1	-38
High fat, sugar, salt spreads, oils, high fat savoury sauces, meal helpers (stocks, tomato paste) and soups	0	-2	13	11
Sugar sweetened drinks	-6	6	-23	-23
Alcohol	-1	-4	-2	-7
Subtotal	-1	-4	-2	-7
Miscellaneous				
Vitamin and mineral supplements	0	2	1	3
Tea and coffee	-2	0	0	-2
Supermarkets (mostly non-core foods)	0	0	0	0
Supermarkets (mostly core foods)	0	0	0	0
Supermarkets (generic supermarket ads or not clear for core or non-core)	0	0	5	5
Baby and toddler milk formulae	-3	0	5	2

Subtotal	-5	2	11	8

At what rate are advertisements for fast-food restaurants broadcast, and what proportion advertise 'healthy' alternatives?

At the food type level of coding all fast food advertisements were coded as non-core foods. However, at the sub-code level fast food advertisements were coded according to whether they promoted non-core items (e.g., high fat, salt and/or sugar foods), healthy alternatives (e.g., options that are reduced fat) or non-specific (where a range of non-core and healthy alternatives were advertised together or where the nutritional constituents of combined dish items were unclear).

Adelaide FTA

The biggest advertisers on Adelaide FTA TV in order are McDonalds, Hungry Jacks, Subway, KFC, Dominos and Red Rooster (Table 17). McDonalds, Hungry Jacks and Subway have the highest revenue and therefore it is not surprising that these companies have the highest number of advertisements. Typical quick-service fast food restaurants (e.g., McDonalds, Hungry Jacks) advertise more than fast casual eateries (e.g., Barnacle Bills, Caffe Primo and Fasta Pasta).

Of the big advertisers, Subway advertise the most healthy alternatives (71 ads) followed by McDonalds (50 ads) and KFC (1 ad only). The only other companies to advertise healthy alternatives are Dannys Thai Bistro (7 ads), Jamaica Blue (2 ads) and Noodle Box (4 ads), all minor advertisers.

As shown in Figure 11, non-core foods comprised the greatest proportion of total fast food restaurant advertising, followed by non-specific or unclear ads and ads for healthy alternatives.

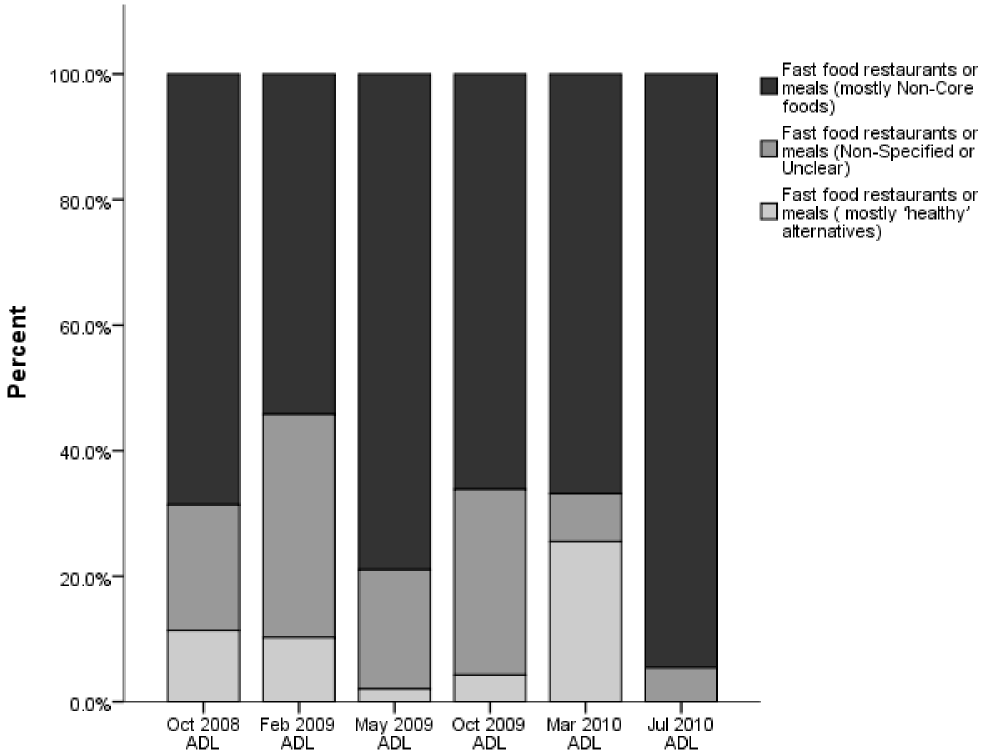


Figure 11: Proportion (%) of fast food advertisements that were non-core, mostly healthy alternatives and non-specific for each time point between Oct 2008 and July 2010 for Adelaide free-to-air television
NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements

Table 17: Number (N) and percentage (%) of total fast food advertisements that were non-core, mostly healthy alternatives and non-specific by food advertiser for each time point between Oct 2008 and July 2010 for Adelaide free-to-air television (Includes food sponsorship)

		Adelaide FTA													
		Oct-08		Feb-09		May-09		Oct-09		Mar-10		Jul-10		Total	
Advertiser	Food type	n	%	n	%	n	%	n	%	n	%	n	%	n	%
Barnacle Bill	Non-core	10	100.0	16	100.0	12	100.0	10	100.0	6	100.0	4	100.0	58	100.0
Boost Juice	Non-specific	26	100.0	0	.0	0	.0	0	.0	11	100.0	0	.0	37	100.0
Caffe Primo	Non-core	1	100.0	0	.0	5	62.5	7	100.0	0	.0	0	.0	13	35.1
	Non-specific	0	.0	21	100.0	3	37.5	0	.0	0	.0	0	.0	24	64.9
Dannys Thai Bistro	Healthy Alt	0	.0	7	100.0	0	.0	0	.0	0	.0	0	.0	7	100.0
Dominos Pizza	Non-core	17	100.0	42	60.9	15	100.0	21	100.0	19	100.0	0	.0	114	80.9
	Non-specific	0	.0	27	39.1	0	.0	0	.0	0	.0	0	.0	27	19.1
Eagle Boys Pizza	Non-core	0	.0	0	.0	0	.0	0	.0	0	.0	13	100.0	13	100.0
Fasta Pasta	Non-specific	0	.0	10	100.0	0	.0	0	.0	0	.0	0	.0	10	100.0
Gloria Jeans Coffees	Non-specific	0	.0	0	.0	10	100.0	0	.0	0	.0	0	.0	10	100.0
Great Aussie Pizza	Non-core	2	100.0	0	.0	0	.0	0	.0	0	.0	0	.0	2	100.0
Hogs Breath Cafe	Non-core	23	100.0	0	.0	0	.0	0	.0	0	.0	0	.0	23	39.7
	Non-specific	0	.0	0	.0	29	100.0	5	100.0	0	.0	1	100.0	35	60.3
Hudson’s Coffee	Non-specific	0	.0	16	100.0	0	.0	0	.0	0	.0	0	.0	16	100.0
Hungry Jacks	Non-core	15	100.0	58	100.0	60	100.0	30	100.0	49	100.0	83	95.4	295	98.7
	Non-specific	0	.0	0	.0	0	.0	0	.0	0	.0	4	4.6	4	1.3
Jamaica Blue Cafe	Healthy Alt	0	.0	0	.0	0	.0	2	100.0	0	.0	0	.0	2	100.0
KFC	Non-core	31	100.0	30	100.0	49	94.2	34	97.1	3	100.0	33	100.0	180	97.8
	Healthy Alt	0	.0	0	.0	0	.0	1	2.9	0	.0	0	.0	1	.5
	Non-specific	0	.0	0	.0	3	5.8	0	.0	0	.0	0	.0	3	1.6
Marcellina	Non-specific	0	.0	0	.0	0	.0	0	.0	0	.0	2	100.0	2	100.0
McDonalds	Non-core	35	52.2	19	38.0	18	48.6	52	59.8	75	71.4	72	94.7	271	64.2
	Healthy Alt	0	.0	23	46.0	3	8.1	0	.0	24	22.9	0	.0	50	11.8
	Non-specific	32	47.8	8	16.0	16	43.2	35	40.2	6	5.7	4	5.3	101	23.9
Noodle Box	Non-core	2	100.0	0	.0	0	.0	0	.0	0	.0	0	.0	2	33.3
	Healthy Alt	0	.0	0	.0	4	100.0	0	.0	0	.0	0	.0	4	66.7
Pizza Haven	Non-core	7	100.0	0	.0	0	.0	0	.0	0	.0	0	.0	7	100.0

Pizza Hut	Non-core	5	100.0	19	100.0	8	100.0	6	100.0	12	100.0	9	100.0	59	100.0
Red Rooster	Non-core	51	100.0	3	75.0	22	100.0	7	100.0	0	.0	10	83.3	93	96.9
	Non-specific	0	.0	1	25.0	0	.0	0	.0	0	.0	2	16.7	3	3.1
Ronald McDonald House	Non-specific	0	.0	2	100.0	0	.0	0	.0	0	.0	0	.0	2	100.0
Sammys on the Marina	Non-specific	0	.0	0	.0	0	.0	0	.0	0	.0	1	100.0	1	100.0
Subway	Non-core	0	.0	4	6.3	77	100.0	3	7.7	0	.0	32	100.0	116	42.2
	Healthy Alt	33	100.0	9	14.3	0	.0	0	.0	29	93.5	0	.0	71	25.8
	Non-specific	0	.0	50	79.4	0	.0	36	92.3	2	6.5	0	.0	88	32.0
Sumo Salad	Healthy Alt	0	.0	0	.0	0	.0	8	100.0	1	100.0	0	.0	9	100.0
Tap Inn Hotel	Non-core	0	.0	5	100.0	0	.0	0	.0	0	.0	0	.0	5	100.0
The Coffee Club	Non-core	0	.0	0	.0	0	.0	0	.0	0	.0	4	100.0	4	100.0
The Lion Hotel	Non-core	0	.0	1	100.0	0	.0	0	.0	0	.0	0	.0	1	50.0
	Non-specific	0	.0	0	.0	0	.0	0	.0	0	.0	1	100.0	1	50.0
The Original Pancake Kitchen	Non-core	0	.0	9	100.0	0	.0	0	.0	0	.0	0	.0	9	100.0
The Oxford Hotel Pty Ltd	Non-specific	0	.0	0	.0	4	100.0	0	.0	0	.0	0	.0	4	100.0
Truck Specials	Non-core	0	.0	0	.0	0	.0	0	.0	1	100.0	0	.0	1	100.0
Wok In A Box	Non-core	0	.0	0	.0	4	100.0	0	.0	0	.0	0	.0	4	30.8
	Healthy Alt	0	.0	0	.0	0	.0	0	.0	9	100.0	0	.0	9	69.2

†Data collected by AC Nielsen – fewer-food ads

Whyalla FTA

The biggest advertisers on Whyalla FTA TV in order are McDonalds, Hungry Jacks and Subway, with McDonalds having more than twice as many ads as Hungry Jacks and Subway (Table 18). Other companies to feature prominently include KFC, Barnacle Bill, Eagle Boys Pizza and Pizza Hut. Consistent with Adelaide FTA, McDonalds is clearly the biggest advertiser in Whyalla, however, the difference in advertising between typical quick service restaurants and fast causal eateries was not as marked compared with Adelaide FTA.

Of the big advertisers, McDonalds advertises the most healthy alternatives (73 ads), followed by Subway (3 ads). The only other company to advertise a healthy alternative was Caffe Primo (1 ad).

As shown in Figure 12, non-core foods comprised the greatest proportion of total fast food restaurant advertising, followed by non-specific or unclear ads and ads for healthy alternatives.

Table 18: Number (N) and percentage (%) of total fast food advertisements that were non-core, mostly healthy alternatives and non-specific by food advertiser for each time point between Feb 2009 and July 2010 for Whyalla free-to-air television (Includes food sponsorship)

		Whyalla FTA							
		Feb-09		Mar-10		Jul-10		Total	
Advertiser	Food type	n	%	n	%	n	%	n	%
Anglers Inn Hotel	Non-core	5	100.0	0	0.0	0	0.0	5	100.0
Barnacle Bill	Non-core	14	100.0	15	100.0	14	100.0	43	100.0
Caffe Primo	Healthy' Alts	0	0.0	1	100.0	0	0.0	1	100.0
Coffee Club	Non-specific	0	0.0	1	100.0	0	0.0	1	100.0
Eagle Boys Pizza	Non-core	4	100.0	1	100.0	25	100.0	30	100.0
Genova Pizza Bar	Non-core	4	100.0	0	0.0	0	0.0	4	100.0
Hungry Jacks	Non-core	30	100.0	26	100.0	35	100.0	91	100.0
KFC	Non-core	19	100.0	18	100.0	22	100.0	59	100.0
McDonalds	Non-core	1	4.0	75	63.6	53	63.1	129	56.8
	Healthy' Alts	13	52.0	36	30.5	24	28.6	73	32.2
	Non-specific	11	44.0	7	5.9	7	8.3	25	11.0
Pizza Hut	Non-core	10	100.0	2	100.0	8	100.0	20	100.0
Subway	Non-core	0	0.0	0	0.0	12	57.1	12	11.4
	Healthy' Alts	0	0.0	3	100.0	0	0.0	3	2.9
	Non-specific	81	100.0	0	0.0	9	42.9	90	85.7

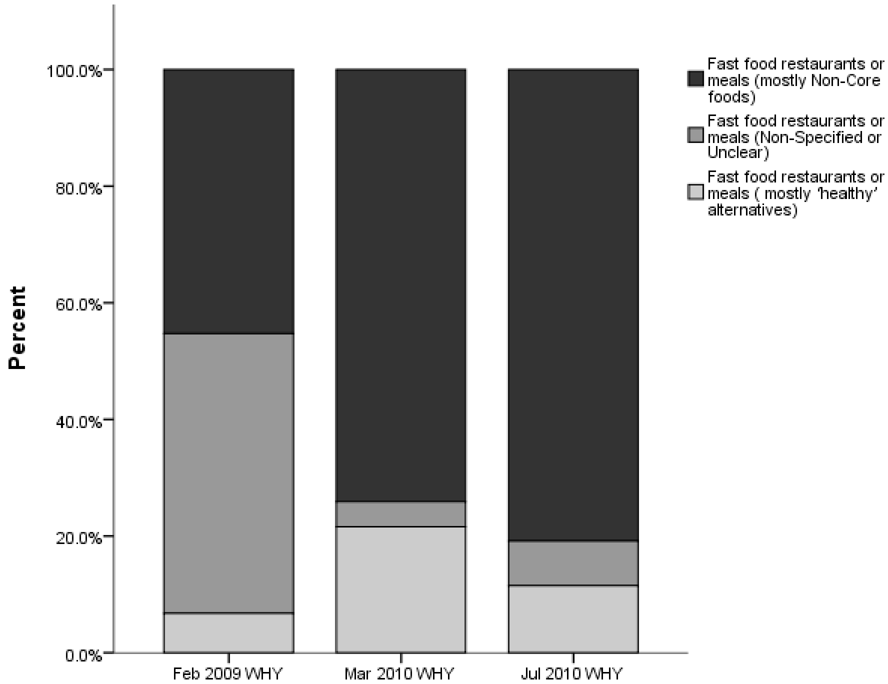


Figure 12: Proportion (%) of fast food advertisements that were non-core, mostly healthy alternatives and non-specific for each time point between Feb 2009 and July 2010 for Whyalla free-to-air television

Pay TV

Consistent with Adelaide and Whyalla FTA, the biggest advertisers in order are McDonalds, Hungry Jacks and Subway (Table 19). Both McDonalds and Subway advertise healthy alternatives more often than non-core foods on Pay TV.

Table 19: Number (N) and percentage (%) of total fast food advertisements that were non-core, mostly healthy alternatives and non-specific by food advertiser for each time point between Feb 2009 and July 2010 for Pay TV (Includes food sponsorship)

		Pay TV							
		Feb-09		Mar-10		Jul-10		Total	
Advertiser	Food type	n	%	n	%	n	%	n	%
AMF Bowling	Non-specific	0	0.0	7	100.0	0	0.0	7	100.0
Dominos Pizza	Non-core	3	100.0	0	0.0	0	0.0	3	100.0
Eagle Boys Pizza	Non-core	0	0.0	2	100.0	0	0.0	2	22.2
	Non-specific	0	0.0	0	0.0	7	100.0	7	77.8
Hungry Jacks	Non-core	16	100.0	48	80.0	8	72.7	72	82.8
	Non-specific	0	0.0	12	20.0	3	27.3	15	17.2
McDonalds	Non-core	21	20.8	66	38.8	12	18.2	99	29.4
	Healthy Alt	56	55.4	8	4.7	52	78.8	116	34.4
	Non-specific	24	23.8	96	56.5	2	3.0	122	36.2
Pizza Hut	Non-core	2	100.0	2	100.0	0	0.0	4	100.0
Red Rooster	Non-core	0	0.0	0	0.0	1	100.0	1	100.0
Subway	Non-core	0	0.0	0	0.0	1	25.0	1	6.3
	Healthy Alt	0	0.0	8	100.0	0	0.0	8	50.0
	Non-specific	4	100.0	0	0.0	3	75.0	7	43.8

As shown in Figure 13, ads for healthy alternatives comprised the greatest proportion of total fast food restaurant advertising, followed by non-specific or unclear ads and non-core foods ads, the opposite pattern to Adelaide and Whyalla FTA TV.

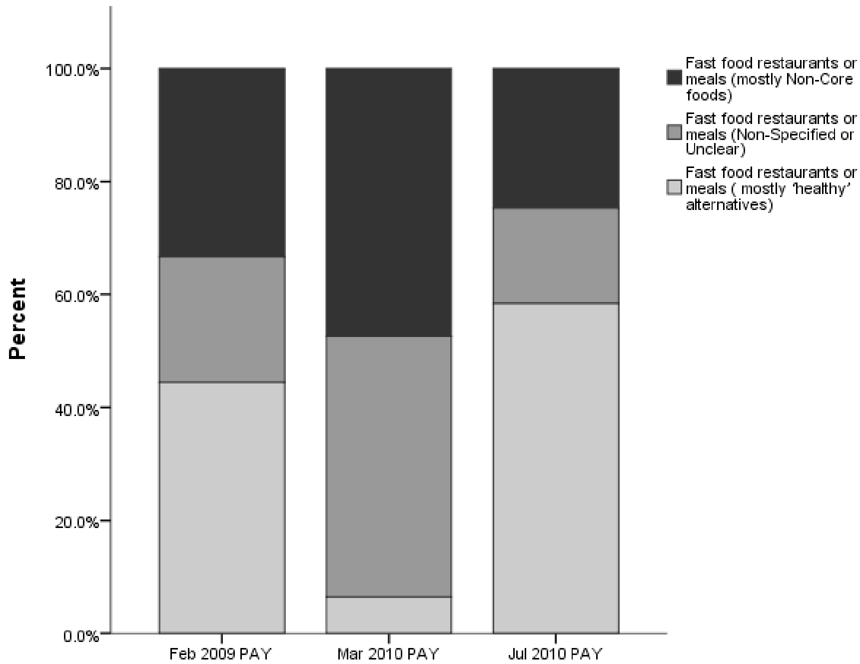


Figure 13: Proportion (%) of fast food advertisements that were non-core, mostly healthy alternatives and non-specific for each time point between Feb 2009 and July 2010 for Pay TV

In summary, there are a greater number of companies advertising fast food on Adelaide FTA TV than on Whyalla FTA or Pay TV.

McDonalds, Hungry Jacks and Subway, the 3 companies with the highest revenue, are the top advertises on Adelaide FTA, Whyalla FTA and Pay TV. Of these, only McDonalds and Subway advertise healthy alternatives. Naturally, this may be due to the availability of healthier options at these restaurants.

On Pay TV only, advertisements for healthy alternatives outnumbered advertisements for non-core foods, due to advertising of healthy alternatives by McDonalds and Subway.

What marketing techniques (Promotional Offers, Product Endorsement or Nutritional Claims) do food advertisers use to promote food products to children, and what proportion of food advertisements use these techniques, examined by core and non-core foods?

Adelaide FTA

All persuasive marketing techniques are used to advertise food on Adelaide FTA television (Table 20). The most commonly used technique is nutrition claims, followed by promotional characters and premium offers. Nutrition claims and Promotional characters are used in advertisements for core foods as well as non-core foods, although more commonly in non-core food ads. Premium offers are used predominantly in advertisements for non-core foods.

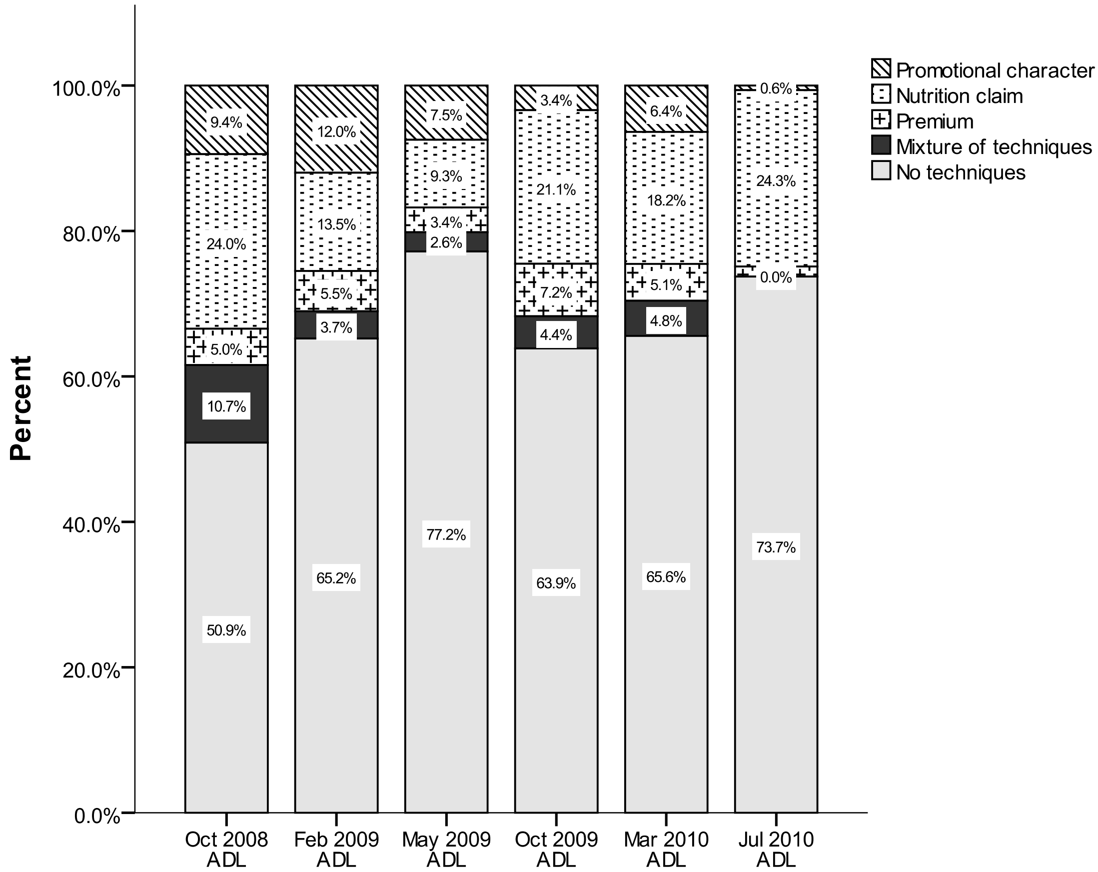
As shown in Figure 14, the majority of food advertising (over 50%) does not feature any techniques. As a proportion of all food advertising, nutrition claims are the most commonly used technique, featuring more than twice as often as any other technique. Promotional characters, premium offers and a mixture of techniques each make up a similar proportion of total food advertising.

Table 20: Number (N) and Frequency (rate) per hour^ of advertisements by food code (core, non-core, miscellaneous and total) featuring promotional characters, nutrition claims and premium offers on Adelaide free-to-air television across time points between Oct 2008 and July 2010 (Includes food sponsorship).

		Adelaide FTA											
		Oct-08†		Feb-09		May-09†		Oct-09		Mar-10		Jul-10	
		n	Freq/h	n	Freq/h	n	Freq/h	n	Freq/h	n	Freq/h	n	Freq/h
Promo Character	Core	9	0.05	49	0.26	11	0.06	24	0.13	54	0.28	0	0.00
	Non-core	52	0.27	90	0.47	29	0.15	45	0.23	39	0.20	6	0.03
	Miscellaneous	42	0.22	16	0.08	25	0.13	1	0.01	6	0.03	0	0.00
	Total	103	0.54	155	0.81	65	0.34	70	0.36	99	0.52	6	0.03
Nutrition Claim	Core	32	0.17	16	0.08	15	0.08	84	0.44	64	0.33	85	0.44
	Non-core	87	0.45	67	0.35	52	0.27	100	0.52	69	0.36	87	0.45
	Miscellaneous	76	0.40	69	0.36	8	0.04	62	0.32	54	0.28	56	0.29
	Total	195	1.02	152	0.79	75	0.39	246	1.28	187	0.97	228	1.19
Premium	Core	0	0.00	6	0.03	0	0.00	14	0.07	7	0.04	0	0.00
	Non-core	64	0.33	62	0.32	12	0.06	63	0.33	50	0.26	13	0.07
	Miscellaneous	0	0.00	7	0.04	12	0.06	9	0.05	14	0.07	0	0.00
	Total	64	0.33	75	0.39	24	0.13	86	0.45	71	0.37	13	0.07

NB: Categories are not mutually exclusive.
^Divided by 192 for all days and channels
†Data collected by AC Nielsen – fewer-food ads

Figure 14 : Proportion of techniques used (promotional character, nutrition claim, premium, mixture of



techniques, no techniques) as a proportion of all advertising for each time point for Adelaide free-to-air television between Oct 2008 and July 2010. *NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements*

Whyalla FTA

All persuasive marketing techniques are used to advertise food on Whyalla FTA television (Table 21). The most commonly used technique is nutrition claims. Promotional characters and premium offers are used in appropriate equal frequency. Nutrition claims are used in advertisements for core foods as well as non-core foods, although more commonly in non-core food ads overall. Promotional characters and Premium offers are used predominantly in advertisements for non-core foods.

As shown in Figure 15, and consistent with Adelaide FTA television, the majority of food advertising does not feature any techniques. As a proportion of all food advertising, nutrition claims are the most commonly used technique. Promotion characters, premium offers and a mixture of techniques each make up a similar proportion of total food advertising.

Table 21: Number (N) and Frequency (rate) per hour of advertisements by food code (core, non-core, miscellaneous and total) featuring promotional characters, nutrition claims and premium offers on Whyalla free-to-air television across time points between Feb 2009 and July 2010 (Includes food sponsorship).

		Whyalla FTA					
		Feb-09		Mar-10		Jul-10	
		n	Freq/h	n	Freq/h	n	Freq/h
Promotional Character	Core	2	0.02	0	0.00	0	0.00
	Non-core	22	0.17	39	0.30	77	0.60
	Miscellaneous	0	0.00	17	0.13	17	0.13
	Total	24	0.19	56	0.44	94	0.73
Nutrition Claim	Core	4	0.03	56	0.44	64	0.50
	Non-core	141	1.10	68	0.53	6	0.05
	Miscellaneous	1	0.01	96	0.75	44	0.34
	Total	146	1.14	220	1.72	114	0.89
Premium	Core	0	0.00	0	0.00	0	0.00
	Non-core	52	0.41	90	0.70	24	0.19
	Miscellaneous	0	0.00	4	0.03	0	0.00
	Total	52	0.41	94	0.73	24	0.19

^Divided by 128 for all days and channels

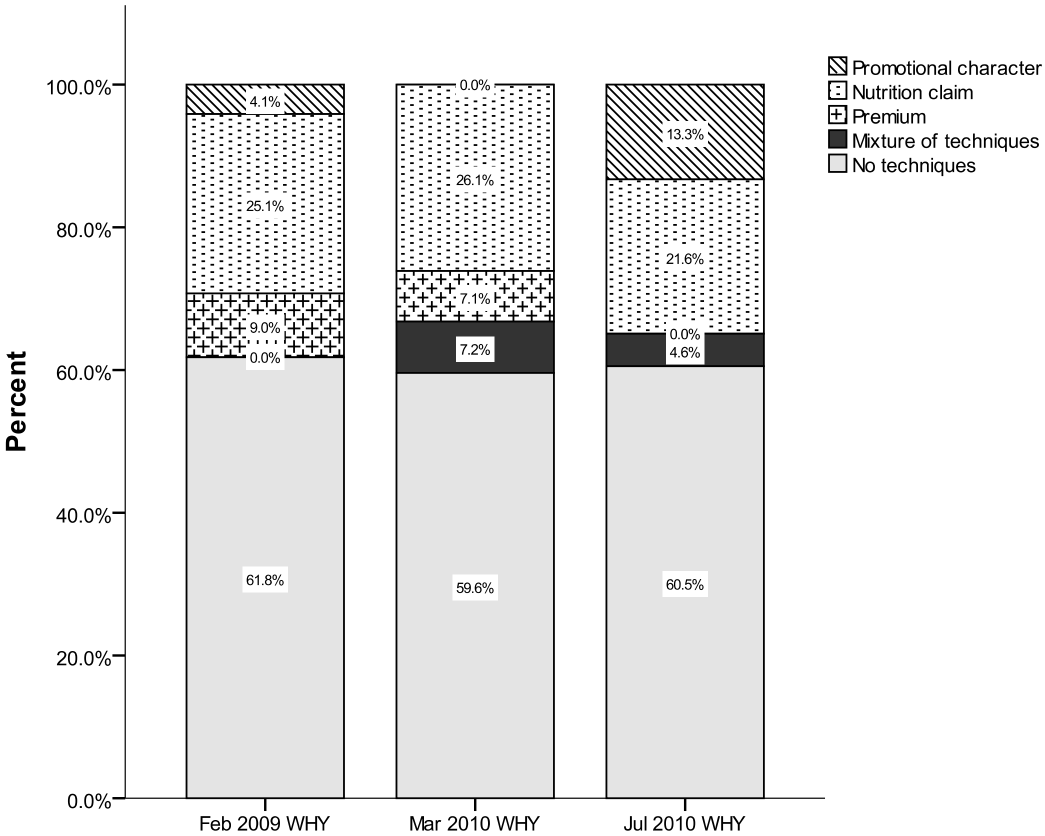


Figure 15: Proportion of techniques used (promotional character, nutrition claim, premium, mixture of techniques, no techniques) as a proportion of all advertising for each time point for Whyalla free-to-air television between Feb 2009 and July 2010.

Pay TV

All persuasive marketing techniques are used to advertise food on Pay TV (Table 22). The most commonly used technique is nutrition claims, followed by premium offers and promotional characters. Nutrition claims are used in advertisements for core foods as well as non-core foods, although more commonly in non-core food ads overall. Promotional characters and Premium offers are used predominantly in advertisements for non-core foods.

In comparison with Adelaide and Whyalla FTA, persuasive marketing techniques feature a higher proportion of all food advertising. As a proportion of all food advertising, nutrition claims are the most commonly used technique, followed by premium offers and promotional characters.

Table 22: Number (N) and Frequency (rate) per hour of advertisements by food code (core, non-core, miscellaneous and total) featuring promotional characters, nutrition claims and premium offers on Pay TV across time points between Feb 2009 and July 2010 (Includes food sponsorship).

		Pay TV					
		Feb-09		Mar-10		Jul-10	
		n	Freq/h	n	Freq/h	n	Freq/h
Promotional Character	Core	6	0.02	10	0.03	9	0.03
	Non-core	12	0.04	9	0.03	52	0.16
	Miscellaneous	0	0.00	0	0.00	4	0.01
	Total	18	0.06	19	0.06	65	0.20
Nutrition Claim	Core	10	0.03	104	0.33	33	0.10
	Non-core	30	0.09	94	0.29	121	0.38
	Miscellaneous	29	0.09	10	0.03	24	0.08
	Total	69	0.22	208	0.65	178	0.56
Premium	Core	28	0.09	0	0.00	0	0.00
	Non-core	75	0.23	25	0.08	52	0.16
	Miscellaneous	0	0.00	0	0.00	9	0.03
	Total	103	0.32	25	0.08	61	0.19

^Divided by 320 for all days and channels

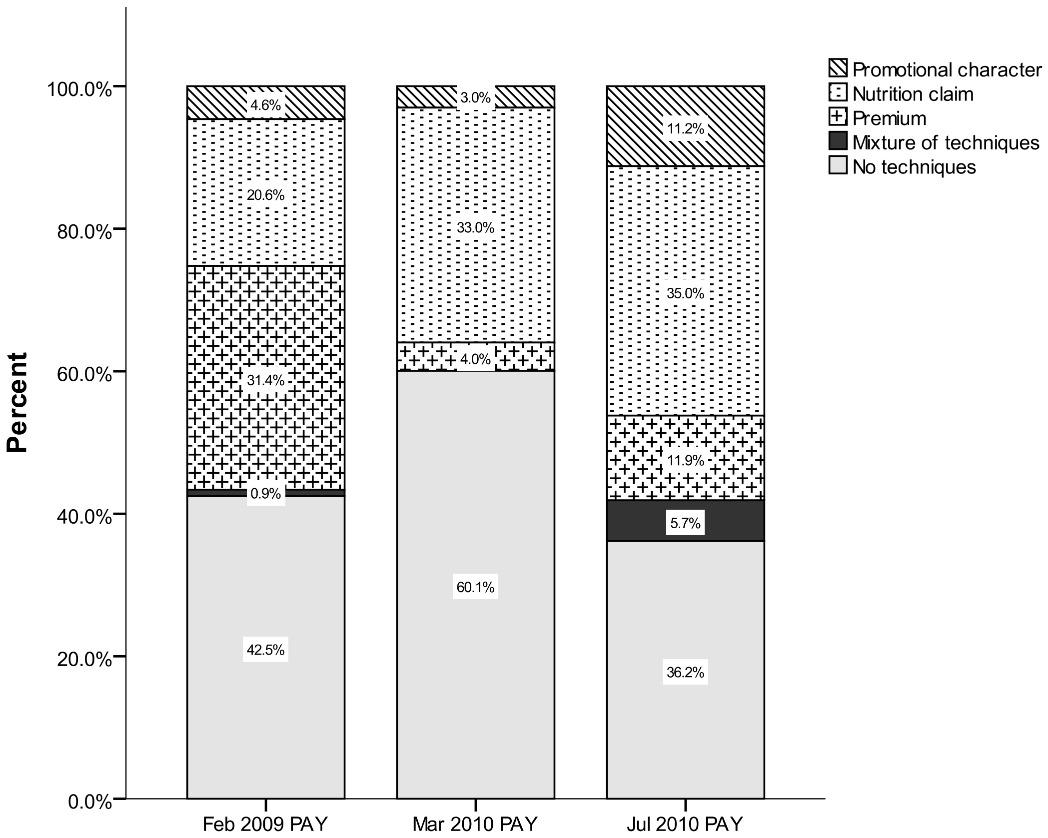


Figure 16: Proportion of techniques used (promotional character, nutrition claim, premium, mixture of techniques, no techniques) as a proportion of all advertising for each time point for Pay TV between Feb 2009 and July 2010.

All persuasive marketing techniques are used to advertise food on Adelaide FTA television, Whyalla FTA television and Pay TV. Persuasive marketing techniques are used more often in advertisements for non-core foods, particularly in regards to promotional characters and premium offers, which are used rarely to advertise core-foods. Nutrition claims are often used to advertise core foods. Advertisements with no techniques make up the largest proportion of all food advertising, followed by advertisements with nutrition claims.

What is the pattern of food advertising that children aged 0 to 14 years are exposed to:

a) During peak viewing times for children aged 0 to 14 years on FTA TV?

The peak viewing times for children aged 0 to 14 years in Adelaide were defined using audience data provided by OzTAM, as those times where the number of children viewing television (on all Adelaide FTA channels combined) is greater than 35% of the maximum child audience rating for the entire day. This cut off was selected as this captured the peaks in children's viewing over the day on weekdays and weekends. As audience data was only available for Adelaide FTA, peak viewing times for Adelaide have been applied to Whyalla.

A summary of peak viewing times in Adelaide for 2008 and 2009 on weekdays and weekends is shown in Table 23. Peak viewing times in 2008 were weekdays 17:30-22:00 and weekends 7:30-11:00 and 16:30-22:00 (shown in more detail in Figure 38 in Appendix C). In 2009, peak viewing times in Adelaide were weekdays 17:30-22:00 and weekends 8:00-11:00 and 17:30-22:00 (Figure 39 in Appendix C).

For the 2008 time point, peak viewing times are based on the annual average audience data for Adelaide 2008. For the 2009 and 2010 time point, peak viewing times are based on the annual average audience data for Adelaide 2009.

Table 23 Peak viewing times for children aged 0-14 year on weekdays and weekends for Adelaide free-to-air television in 2008 and 2009

	2008	2009
Weekdays	1730-2200	1730-2200
Weekends	0730-1100	0800-1100
	1630-2200	1730-2200

<u>Adelaide FTA</u>

The total number of food advertisements and rate of advertisements per hour (ads/hr), during children's peak and non-peak viewing times in Adelaide on FTA is shown in Table 24.

In Adelaide, the total rate of advertising (ads/hour) was higher outside of children's peak than during children's peak viewing hours at each time point, mainly due to an increased rate of advertising for miscellaneous products. However, the rate of food advertising during peak and outside of peak viewing times appears to be similar for both core and non-core. For example, in May 2009, the rate of core advertisements during peak viewing was 0.13 ads/hr compared to 0.11 ads/hr outside of peak viewing, and non-core rates were 1.27 ads/hr in peak and 1.14 ads/hr outside of peak. In July 2010, core advertising in peak hours was 0.55 ads/hr and 0.66 ads/hr outside of peak; and non-core advertising was 1.48 in peak and 1.64 ads/hr outside of peak (Table 24).

The rate of core food advertising during peak hours was 0.16 ads/hr in 2008, 0.13-0.66 ads/hr in 2009 and 0.55-0.67 ads/hr in 2010; compared to outside of peak where the rate was 0.14 ads/hr in 2008, 0.11-0.78 ads/hr in 2009 and 0.63-0.66 ads/hr in 2010.

The rate of non-core food advertising in October 2008, February and May 2009, during peak and outside of peak viewing hours was similar, with the rate during peak hours being slightly higher than outside of peak. A small but noticeable shift has occurred since October 2009 with the rate of non-core food advertising during peak hours being lower than during outside of peak hours for October 2009 and March and July 2010 (Table 24).

The rate of core and non-core food advertising during children's peak and outside of peak hours was similar. Previous to May 2009, non-core food advertising was slightly higher during peak hours; however since October 2009 the rate of non-core food advertising has been slightly higher during outside of peak viewing hours (see Figure 17). These are only small trends and should be interpreted with caution.

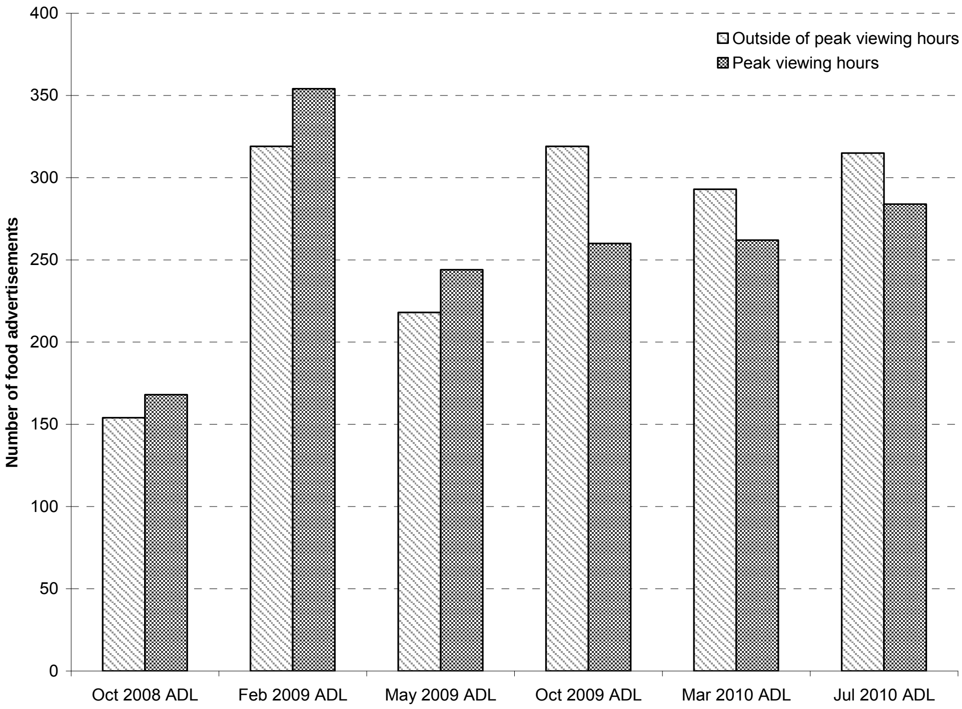


Figure 17: Number (N) of non-core food advertisements falling inside and outside of children's peak viewing times across all time points for Adelaide free-to-air television between Oct 2008 and July 2010. *NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements*

Table 24 Total number (rate per hour) of food advertising (core, non-core, miscellaneous and total) during children's peak and non-peak viewing times in Adelaide for free-to-air television across time points between Oct 2008 and July 2010.

		Adelaide FTA											
		Oct-08		Feb-09		May-09		Oct-09		Mar-10		Jul-10	
Outside of peak viewing hours	Core	26	(0.14)	107	(0.56)	22	(0.11)	150	(0.78)	121	(0.63)	126	(0.66)
	Non-core	154	(0.80)	319	(1.66)	218	(1.14)	319	(1.66)	293	(1.53)	315	(1.64)
	Miscellaneous	119	(0.62)	123	(0.64)	90	(0.47)	130	(0.68)	82	(0.43)	81	(0.42)
	Total	299	(1.56)	549	(2.86)	330	(1.72)	599	(3.12)	496	(2.58)	522	(2.72)
Peak viewing hours	Core	30	(0.16)	63	(0.33)	24	(0.13)	127	(0.66)	129	(0.67)	105	(0.55)
	Non-core	168	(0.88)	354	(1.84)	244	(1.27)	260	(1.35)	262	(1.36)	284	(1.48)
	Miscellaneous	65	(0.34)	62	(0.32)	46	(0.24)	54	(0.28)	59	(0.31)	75	(0.39)
	Total	263	(1.37)	479	(2.49)	314	(1.64)	441	(2.30)	450	(2.34)	464	(2.42)
Total	Core	56	(0.29)	170	(0.89)	46	(0.24)	277	(1.44)	250	(1.30)	231	(1.20)
	Non-core	322	(1.68)	673	(3.51)	462	(2.41)	579	(3.02)	555	(2.89)	599	(3.12)
	Miscellaneous	184	(0.96)	185	(0.96)	136	(0.71)	184	(0.96)	141	(0.73)	156	(0.81)
	Total	562	(2.93)	1028	(5.35)	644	(3.35)	1040	(5.42)	946	(4.93)	986	(5.14)

Note. The peak viewing times for children aged 0 to 14 years in Adelaide were defined using audience data provided by OzTam, as those times where the number of children viewing television (on all Adelaide FTA channels combined) is greater than 35% of the maximum child audience rating for the entire day
^Divided by 192 for all days and channels
†Data collected by AC Nielsen – fewer-food ads

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Whyalla FTA

The total number of food advertisements and rate of advertisements per hour (ads/hr), during children's peak and non peak viewing time in Whyalla on FTA is shown in Table 25.

Like for Adelaide, in Whyalla, the total rate of food advertising is higher outside of peak than during peak viewing hours at each time point, and the rate of core food advertising is lower than non-core food advertising at each time point in both peak and outside of peak viewing hours. There is no clear trend over time (Table 25).

> Food advertising is dominated by non-core food advertising in Whyalla.

Table 25 Total number (rate per hour) of food advertising (core, non-core, miscellaneous and total) during children's peak and non-peak viewing times in Whyalla for free-to-air television across time points between Feb 2009 and July 2010

		Whyalla FTA					
		Feb-09		Mar-10		Jul-10	
Outside of peak viewing hours	Core	2	(0.02)	55	(0.43)	59	(0.46)
	Non-core	343	(2.68)	333	(2.60)	187	(1.46)
	Miscellaneous	38	(0.30)	110	(0.86)	62	(0.48)
	Total	383	(2.99)	498	(3.89)	308	(2.41)
Is within peak viewing hours	Core	4	(0.03)	24	(0.19)	30	(0.23)
	Non-core	185	(1.45)	208	(1.63)	145	(1.13)
	Miscellaneous	19	(0.15)	47	(0.37)	46	(0.36)
	Total	208	(1.63)	279	(2.18)	221	(1.73)
Total	Core	6	(0.05)	79	(0.62)	89	(0.70)
	Non-core	528	(4.13)	541	(4.23)	332	(2.59)
	Miscellaneous	57	(0.45)	157	(1.23)	108	(0.84)
	Total	591	(4.62)	777	(6.07)	529	(4.13)

Note. Peak viewing times for children aged 0 to 14 years in Adelaide were defined using audience data provided by OzTam, as those times where the number of children viewing television (on all Adelaide FTA channels combined) is greater than 35% of the maximum child audience rating for the entire day.
^Divided by 128 for all days and channels

b) During programs most popular with children compared with those most popular with adults on FTA TV?

Audience data was used to determine the 25 most popular programs with children aged 0-14 years old and with adults (18 years old and over) across all four days separately for each of the time periods.

Table 26 to Table 31 show the total number of food advertisements and the proportion of these food advertisements that were for non-core foods during the top 25 most popular programs for children and adults, in Adelaide FTA. It was evident that adult audiences were larger than children audiences. With the noted exception of early morning time slots on the weekends, children generally make up less than 20% of the total audience between 6AM and 10PM (see figures in Appendix D).

In October 2008, during the most popular children's programs, 11 out of 25 programs showed only non-core food advertisements (i.e., 100% of food advertisements were non-core) and six (out of 25) contained no food advertisements. This is compared to the most popular adults programs, where six out of 25 showed only non-core food advertising and ten (out of 25) contained no food advertisements (Table 26).

Programs were classified as containing "mostly non-core food advertising" when more than 50% of food advertisements they contained were for non-core food. Using this criterion, in October 2008, 72% (18/25) of the popular children's programs and 36% (9/25) of adults programs showed mostly non-core food advertising. Therefore, during 2008, non-core food advertising was more common in children's popular programs compared to adults' popular programs.

Three data points are available for 2009 (Table 27-Table 29). In February 2009, the rates of mostly non-core food advertising were the same between children's and adult programs (18/25=72%). In May 2009, the rate for children's programs was the same as Feb 2009 (72%) whereas 56% of adults' most popular programs showed mainly non-core food advertising. This decreased in both children's (13/25=52%) and adults' (6/25=24%) popular programs in October 2009. Throughout the 2009 period, the frequency of not showing any non-core food advertisement (i.e., 0% of food advertisements were non-core) was consistently higher in popular adult programs compared to children's programs.

Throughout the 2010 period, the frequency of not showing any non-core food advertisement (i.e., 0% of food advertisements were non-core) was also always higher in popular adult programs compared to children's programs. The percentage of popular programs showing mostly non-core food advertisements was 56-64% during children's popular programs and 40-56% during adults' popular programs.

Figure 18 gives a summary of the data showing the percentage of popular programs showing mostly non-core food advertisements during adult and children's programs, over the time points.

In summary, it appears that non-core food advertising is more common during children's popular programs compared to adult popular programs. Across five out of six time points, the percentage of popular programs showing "mostly non-core food advertising" was higher during children's programs compared to adults' popular programs. In addition, not showing any non-core food advertisements was more common during adult popular programs compared to children's popular programs.

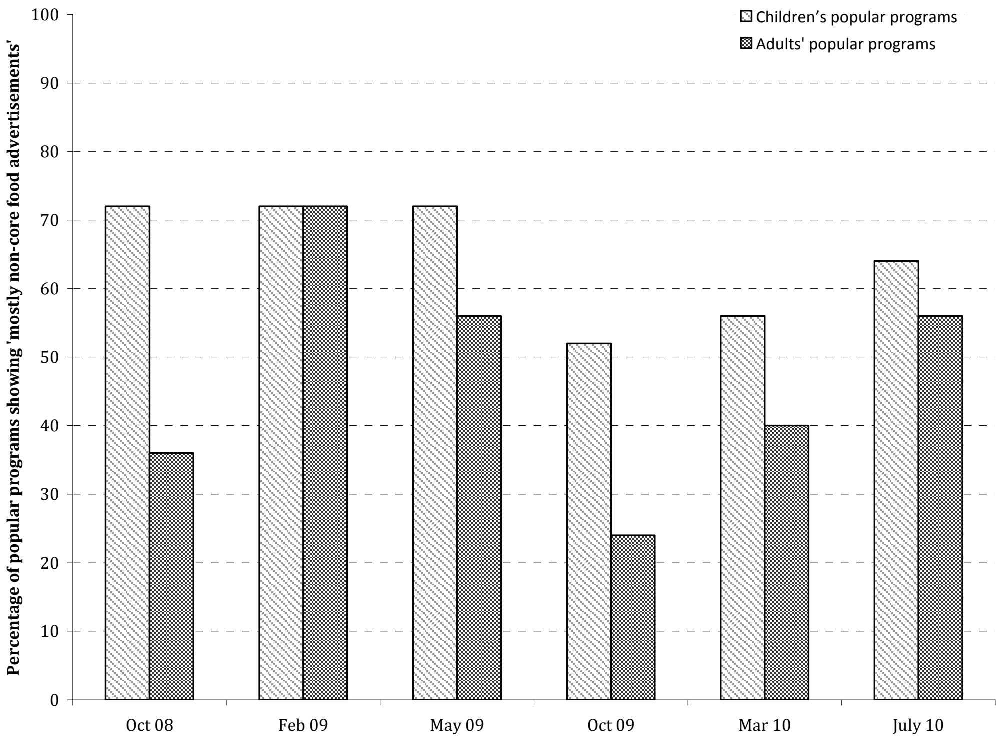

Figure 18 Percentage (%) of children and adults popular programs screening on Adelaide free-to-air television showing mostly non-core (over 50%) food advertisements across time points between Oct 2008 and July 2010 *NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements*

Table 26 Top 25 most popular programs for children and adults in October 2008 for Adelaide free-to-air television showing the network, Average Daily Audience (AUD), total number of food advertisements (N), the proportion (%) of non-core advertisements and frequency per hour of food advertisements

Oct-08													
Children							Adults						
Rank	Program	Network	AUD*	Food Ads	% Non-core	Food Ads /h	Rank	Program	Network	AUD*	Food ads	% Non-core	Food Ads /h
1	The Simpsons	TEN	33000	4	100.0	8.0	1	The Mentalist	NINE	171000	3	33.3	3.0
2	Kenny's World	TEN	30000	1	100.0	2.0	2	Packed To The Rafters	SEVEN	159000	3	.0	3.0
3	The Simpsons	TEN	28000	1	.0	2.0	3	The Force: Behind The Line	SEVEN	157000	2	.0	4.0
4	Neighbours	TEN	27000	4	100.0	8.0	4	City Homicide	SEVEN	153000	4	50.0	4.0
5	Australian Idol	TEN	26000	5	80.0	5.0	5	CSI Miami	NINE	152000	0	.0	0.0
6	Australian Idol	TEN	24000	6	83.3	6.0	6	The Zoo	SEVEN	147000	2	100.0	4.0
7	The Simpsons	TEN	23000	2	50.0	4.0	7	Seven News	SEVEN	145000	2	50.0	4.0
“	Neighbours	TEN	23000	2	100.0	4.0	8	Today Tonight	SEVEN	142000	0	.0	
9	Friends	TEN	22000	5	100.0	10.0	9	Find My Family	SEVEN	141000	1	100.0	2.0
“	The Simpsons	TEN	22000	5	60.0	10.0	10	Seven News	SEVEN	140000	0	.0	
11	Toon Disney(R)	SEVEN	21000	0	.0	0.0	11	All Saints	SEVEN	139000	4	25.0	4.0
“	Toon Disney	SEVEN	21000	0	.0	0.0	12	Border Security	SEVEN	136000	1	100.0	2.0
13	NCIS	TEN	20000	5	100.0	5.0	13	CSI: Crime Scene Investigation	NINE	135000	4	25.0	4.0
14	Movie: Monster House	NINE	19000	4	75.0	2.0	14	National Nine News	NINE	132000	4	25.0	8.0
“	Friends	TEN	19000	3	100.0	6.0	“	Today Tonight	SEVEN	132000	1	.0	2.0
16	Movie: Shark Tale	SEVEN	18000	10	60.0	5.0	16	National Nine News	NINE	131000	1	.0	2.0
“	The 22nd Annual ARIA Awards	TEN	18000	13	76.9	5.2	17	Two And A Half Men	NINE	130000	1	100.0	2.0
18	Home And Away	SEVEN	17000	1	100.0	2.0	18	60 Minutes	NINE	128000	2	.0	2.0
19	Find My Family	SEVEN	16000	1	100.0	2.0	19	Two And A Half Men	NINE	127000	3	66.7	6.0
“	The Zoo	SEVEN	16000	2	100.0	4.0	20	Seven News	SEVEN	126000	1	.0	2.0
21	Today Tonight	SEVEN	15000	1	.0	2.0	21	Home And Away	SEVEN	117000	1	100.0	2.0
22	20 To 1	NINE	13000	1	.0	1.0	22	Australian Idol	TEN	116000	5	80.0	5.0
“	Seven News	SEVEN	13000	0	.0	0.0	23	A Current Affair	NINE	113000	1	.0	2.0
“	Two And A Half Men	NINE	13000	3	66.7	6.0	24	NCIS	TEN	112000	5	100.0	5.0
“	Two And A Half Men	NINE	13000	1	100.0	2.0	25	National Nine News	NINE	108000	4	50.0	8.0

*AUD = Audience according to OzTAM data

Table 27 Top 25 most popular programs for children and adults in February 2009 for Adelaide free-to-air television showing the network, Average Daily Audience (AUD), total number of food advertisements (N), the proportion (%) of non-core advertisements and frequency per hour of food advertisements

Feb-09																			
Children										Adults									
Rank	Program	Network	AUD	Food Ads	Sponsor ship	Total	% Non-core	Food Ads /h		Rank	Program	Network	AUD	Food ads	Sponsor ship	Total	% Non-core	Food Ads /h	
1	The Biggest Loser	TEN	31000	11	3	14	42.9	14.0		1	Underbelly: A Tale of Two Cities	NINE	229000	7	1	8	62.5	8.0	
2	Wipeout	NINE	27000	8	0	8	87.5	8.0		2	Twenty/20 - Australia v New Zealand	NINE	173000	17	1	18	94.4	6.0	
3	The Simpsons	TEN	26000	5	3	8	87.5	16.0		3	Seven News	SEVEN	163000	8	0	8	87.5	16.0	
4	The Biggest Loser	TEN	24000	10	0	10	70.0	10.0		4	Seven News	SEVEN	159000	2	0	2	100.0	4.0	
5	Neighbours	TEN	23000	9	0	9	100.0	18.0		5	Packed to the Rafters	SEVEN	156000	6	1	7	71.4	7.0	
6	The Biggest Loser	TEN	22000	2	2	4	.0	8.0		6	Nine News	NINE	150000	1	1	2	50.0	4.0	
"	So You Think You Can Dance	TEN	22000	12	0	12	91.7	12.0		7	Seven News	SEVEN	144000	1	1	2	100.0	4.0	
8	Australia's Funniest Home Videos	NINE	21000	11	0	11	63.6	11.0		"	Today Tonight	SEVEN	144000	3	0	3	66.7	6.0	
9	So You Think You Can Dance	TEN	18000	17	0	17	82.4	11.3		"	Customs	NINE	144000	1	0	1	100.0	2.0	
10	Bondi Rescue	TEN	17000	4	1	5	100.0	10.0		10	NCIS	TEN	143000	8	0	8	87.5	8.0	
"	Neighbours	TEN	17000	4	0	4	100.0	8.0		11	Today Tonight	SEVEN	142000	7	0	7	71.4	14.0	
12	NCIS	TEN	15000	8	0	8	87.5	8.0		12	Seven News	SEVEN	136000	0	0	0	.0	0.0	
13	The Simpsons	TEN	14000	7	0	7	100.0	14.0		13	All Saints	SEVEN	130000	2	0	2	100.0	2.0	
14	Saturday Disney	SEVEN	13000	18	1	19	68.4	9.5		14	Lie to Me	TEN	128000	8	0	8	62.5	8.0	
"	Raise Your Voice	NINE	13000	10	0	10	50.0	5.0		15	Find My Family	SEVEN	124000	3	0	3	100.0	6.0	
"	Lie to Me	TEN	13000	8	0	8	62.5	8.0		16	Border Security - Australia's Front Line	SEVEN	121000	3	0	3	66.7	6.0	
17	The Simpsons	TEN	12000	9	0	9	88.9	18.0		"	Two and a Half Men	NINE	121000	7	0	7	42.9	14.0	
"	The Simpsons	TEN	12000	4	0	4	100.0	8.0		18	Nine News	NINE	120000	1	0	1	.0	2.0	
"	Deal Or No Deal	SEVEN	12000	3	0	3	33.3	6.0		19	Aussie Ladette to Lady	NINE	117000	0	0	0	.0	0.0	
20	Once Upon a Mattress	SEVEN	11000	17	0	17	88.2	11.3		20	Two and a Half Men	NINE	116000	5	0	5	100.0	10.0	
"	Seven News	SEVEN	11000	0	0	0	.0	0.0		21	City Homicide	SEVEN	114000	9	0	9	55.6	9.0	
"	Rove	TEN	11000	0	0	0	0	0.0		22	Sunday Night	SEVEN	113000	1	0	1	.0	1.0	
"	Desperate Housewives	SEVEN	11000	12	0	12	91.7	12.0		23	Ten News	TEN	111000	10	1	11	90.9	11.0	
24	Nine News	NINE	10000	3	1	4	75.0	8.0		"	Home and Away	SEVEN	111000	3	0	3	100.0	6.0	
"	Two and a Half Men	NINE	10000	7	0	7	42.9	14.0		"	A Current Affair	NINE	111000	0	0	0	0	0.0	

*AUD = Audience according to OzTAM data

Table 28 Top 25 most popular programs for children and adults in May 2009 for Adelaide free-to-air television showing the network, Average Daily Audience (AUD), total number of food advertisements (N), the proportion (%) of non-core advertisements and frequency per hour of food advertisements

May-09													
Children							Adults						
Rank	Program	Network	AUD	Food Ads	% Non-core	Food Ads /h	Rank	Program	Network	AUD	Food Ads	% Non-core	Food Ads /h
1	Masterchef Australia	TEN	40000	1	.0	2.0	1	National Nine News	NINE	191000	4	25.0	2.0
2	Talkin' 'bout Your Generation	TEN	35000	12	75.0	12.0	2	Seven News	SEVEN	169000	5	40.0	2.5
3	Masterchef Australia	TEN	34000	3	66.7	3.0	3	NCIS	TEN	163000	9	55.6	9.0
4	Neighbours	TEN	29000	7	85.7	14.0	4	National Nine News	NINE	152000	1	.0	0.5
5	Recruits	TEN	28000	3	100.0	6.0	5	The Zoo	SEVEN	152000	4	100.0	2.0
6	The Simpsons	TEN	27000	6	66.7	12.0	6	Sea Patrol	NINE	151000	3	100.0	3.0
7	The Simpsons	TEN	26000	6	100.0	12.0	7	Today Tonight	SEVEN	151000	0	.0	0.0
“	Neighbours	TEN	26000	9	100.0	18.0	8	Find My Family	SEVEN	151000	3	100.0	1.5
9	Masterchef Australia	TEN	23000	1	.0	1.0	9	Seven News	SEVEN	148000	1	.0	0.5
10	NCIS	TEN	21000	9	55.6	9.0	10	Seven News	SEVEN	139000	1	.0	0.5
11	The Zoo	SEVEN	20000	4	100.0	8.0	11	Bones	SEVEN	137000	3	66.7	3.0
12	Saturday Disney	SEVEN	19000	6	83.3	3.0	12	Masterchef Australia	TEN	134000	1	.0	0.5
13	Australia's Funniest Home Videos Show	NINE	18000	3	100.0	3.0	13	Nine News	NINE	134000	1	100.0	0.5
“	Merlin	TEN	18000	7	100.0	7.0	14	Today Tonight	SEVEN	133000	1	100.0	0.5
15	HomeMADE	NINE	17000	1	.0	1.0	15	Lie To Me	TEN	131000	0	.0	0.0
16	Movie: Return To Never Land	SEVEN	15000	4	100.0	2.7	16	Seven News	SEVEN	127000	1	100.0	0.5
17	Seven News	SEVEN	14000	1	100.0	2.0	17	CSI: Crime Scene Investigation	NINE	126000	3	.0	3.0
“	Find My Family	SEVEN	14000	3	100.0	6.0	18	Postcards	NINE	125000	0	.0	0.0
“	LIE TO ME	TEN	14000	0	.0	0.0	19	Afl: Brisbane Lions V Adelaide	TEN	124000	25	100.0	37.5
20	Postcards	NINE	13000	0	0	0.0	20	National Nine News	NINE	124000	1	100.0	0.5
“	Good News Week	TEN	13000	6	100.0	4.0	21	60 Minutes	NINE	123000	4	75.0	4.0
“	Seven News	SEVEN	13000	5	40.0	10.0	22	All Saints	SEVEN	118000	2	100.0	2.0
23	Sports Tonight	TEN	12000	4	100.0	8.0	23	Masterchef Australia	TEN	117000	3	66.7	1.5
“	Today Tonight	SEVEN	12000	0	0	0.0	24	Afl: Port Adelaide V Richmond	SEVEN	114000	6	100.0	9.0
“	Home And Away	SEVEN	12000	4	75.0	8.0	25	HomeMADE	NINE	112000	1	.0	1.0

*AUD = Audience according to OzTAM data

Table 29 Top 25 most popular programs for children and adults in October 2009 for Adelaide free-to-air television showing the network, Average Daily Audience (AUD), total number of food advertisements (N), the proportion (%) of non-core advertisements and frequency per hour of food advertisements

Oct-09																	
Children									Adults								
Rank	Program	Network	AUD	Food Ads	Sponsor ship	Total	% Non-core	Food Ads /h	Rank	Program	Network	AUD	Food Ads	Sponsor ship	Total	% Non-core	Food Ads /h
1	Neighbours	TEN	30000	4	2	6	100.0	12.0	1	Packed to the Rafters	SEVEN	188000	8	0	8	12.5	8.0
2	Home and Away	SEVEN	26000	4	2	6	33.3	12.0	2	National Nine News	NINE	175000	7	0	7	28.6	14.0
3	Bridge to Terabithia	SEVEN	24000	8	0	8	37.5	4.0	3	Seven News	SEVEN	148000	1	0	1	.0	2.0
4	The Simpsons	TEN	20000	6	1	7	85.7	14.0	4	All Saints	SEVEN	146000	1	1	2	.0	2.0
“	Today Tonight	SEVEN	20000	-	-	-	-	0.0	5	Seven News	SEVEN	144000	1	0	1	.0	2.0
“	Destroyed in Seconds	SEVEN	20000	2	0	2	50.0	4.0	“	RSPCA Animal Rescue	SEVEN	144000	4	0	4	50.0	8.0
“	Packed to the Rafters	SEVEN	20000	8	0	8	12.5	8.0	“	NCIS	TEN	144000	10	1	11	63.6	11.0
8	The Simpsons	TEN	19000	3	2	5	80.0	10.0	8	The Force - Behind the Line	SEVEN	139000	1	0	1	100.0	2.0
9	Highway Patrol	SEVEN	18000	2	0	2	50.0	4.0	9	Bones	SEVEN	136000	10	0	10	30.0	10.0
10	Talkin' 'Bout Your Generation	TEN	17000	5	0	5	80.0	5.0	10	Last Chance Surgery	SEVEN	133000	2	0	2	100.0	4.0
“	The Simpsons	TEN	17000	7	0	7	71.4	14.0	“	Home and Away	SEVEN	133000	2	0	2	50.0	4.0
12	Simpsons	TEN	16000	4	0	4	100.0	8.0	12	Border Security - Australia's Front Line	SEVEN	130000	2	0	2	50.0	4.0
“	The Simpsons	TEN	16000	5	2	7	42.9	14.0	13	Today Tonight	SEVEN	129000	0	0	0	0	0.0
“	The Simpsons	TEN	16000	7	2	9	66.7	18.0	14	FlashForward	SEVEN	123000	7	0	7	28.6	7.0
15	Australia's Funniest Home Videos	NINE	15000	10	0	10	60.0	10.0	15	Nine News	NINE	120000	3	0	3	100.0	6.0
“	Seven News	SEVEN	15000	1	0	1	.0	2.0	16	Sunday Night	SEVEN	118000	4	0	4	25.0	4.0
17	Australian Idol	TEN	14000	17	1	18	83.3	18.0	17	20 to 1	NINE	116000	8	2	10	70.0	10.0
“	Two and a Half Men	NINE	14000	3	0	3	66.7	6.0	18	Rescue Special Ops	NINE	115000	7	1	8	25.0	8.0
19	RSPCA Animal Rescue	SEVEN	13000	4	0	4	50.0	8.0	“	Home and Away	SEVEN	115000	4	2	6	33.3	12.0
“	Last Chance Surgery	SEVEN	13000	2	0	2	100.0	4.0	“	Today Tonight	SEVEN	115000	3	0	3	66.7	6.0
21	Ella Enchanted	SEVEN	12000	2	0	2	.0	1.0	21	Criminal Minds	SEVEN	114000	1	0	1	.0	1.0
“	20 to 1	NINE	12000	5	0	5	40.0	5.0	22	Destroyed in Seconds	SEVEN	111000	2	0	2	50.0	4.0
“	The 7pm Project	TEN	12000	3	0	3	66.7	6.0	“	A Current Affair	NINE	111000	2	0	2	50.0	4.0
“	20 to 1	NINE	12000	8	2	10	70.0	10.0	“	Postcards	NINE	110000	3	0	3	.0	6.0
25	FlashForward	SEVEN	11000	7	0	7	28.6	7.0	25	Seven News	SEVEN	109000	4	0	4	.0	8.0

*AUD = Audience according to OzTAM data

Table 30 Top 25 most popular programs for children and adults in March 2010 for Adelaide free-to-air television showing the network, Average Daily Audience (AUD), total number of food advertisements (N), the proportion (%) of non-core advertisements and frequency per hour of food advertisements.

Mar-10																	
Children									Adults								
Rank	Program	Network	AUD	Food Ads	Sponsor ship	Total	% Non-core	Food Ads /h	Rank	Program	Network	AUD	Food ads	Sponsor ship	Total	% Non-core	Food Ads /h
1	The Simpsons	TEN	29000	8	0	8	62.5	16.0	1	Seven News	SEVEN	175000	1	0	1	.0	2.0
2	The Simpsons Movie	TEN	28000	17	0	17	64.7	8.5	2	Today Tonight	SEVEN	169000	2	0	2	100.0	4.0
3	Neighbours	TEN	27000	5	0	5	80.0	10.0	3	NCIS	TEN	153000	11	0	11	90.9	11.0
4	Neighbours	TEN	25000	2	1	3	100.0	6.0	4	Bones	SEVEN	148000	4	0	4	75.0	4.0
5	Top Gear	NINE	24000	5	0	5	100.0	3.3	“	My Kitchen Rules	SEVEN	148000	1	0	1	.0	1.0
6	The Simpsons	TEN	22000	8	0	8	75.0	16.0	6	Nine News	NINE	147000	1	0	1	100.0	2.0
“	Survivor: Heroes vs Villains	NINE	22000	15	0	15	60.0	10.0	“	Seven News	SEVEN	147000	1	0	1	.0	2.0
8	Talkin' Bout Your Generation	TEN	19000	15	0	15	66.7	15.0	8	Border Security	SEVEN	144000	1	0	1	.0	2.0
9	My Kitchen Rules	SEVEN	18000	1	0	1	.0	1.0	9	Nine News Sunday	NINE	138000	2	0	2	.0	4.0
10	The Simpsons Sat	TEN	16,000	0	0	0	0	0	“	Today Tonight	SEVEN	138000	1	0	1	.0	2.0
“	Home and Away	SEVEN	16000	5	2	7	42.9	14.0	“	Top Gear	NINE	138000	5	0	5	100.0	5.0
“	My Kitchen Rules	SEVEN	16000	7	1	8	50.0	8.0	12	My Kitchen Rules	SEVEN	136000	7	1	8	50.0	8.0
“	The 7pm Project	TEN	16000	4	0	4	100.0	8.0	“	Air Ways	SEVEN	134000	0	0	0	0	0.0
14	The 7pm Project	TEN	15000	0	0	0	0	0.0	15	The Pacific – Australia Remembers	SEVEN	115000	0	0	0	0	0.0
“	Home and Away	SEVEN	15000	5	1	6	83.3	12.0	“	Two and A Half Men	NINE	115000	5	0	5	60.0	10.0
16	NCIS	TEN	14000	11	0	11	90.9	11.0	16	Grey’s Anatomy	SEVEN	114000	7	0	7	28.6	7.0
17	Whizz Kids	NINE	13000	6	1	7	28.6	7.0	17	TEN News At Five	TEN	113000	6	0	6	50.0	6.0
“	Border Security	SEVEN	13000	1	0	1	.0	2.0	“	Home and Away	SEVEN	113000	5	2	7	42.9	14.0
“	The Biggest Loser: Couples	TEN	13000	5	1	6	66.7	12.0	19	Seven News	SEVEN	111000	2	0	2	.0	4.0
“	Bondi Rescue	TEN	13000	5	0	5	40.0	10.0	20	V	NINE	108000	6	0	6	83.3	6.0
“	Deal Or No Deal	SEVEN	13000	2	2	4	.0	8.0	“	Desperate Housewives	SEVEN	108000	11	0	11	63.6	11.0
“	Seven News	SEVEN	13000	1	0	1	.0	2.0	“	Home and Away	SEVEN	108000	5	1	6	83.3	12.0
23	Seven News	SEVEN	12000	6	0	6	33.3	12.0	23	Nine News Saturday	NINE	107000	2	0	2	100.0	4.0
“	Nine News	NINE	12000	1	0	1	100.0	2.0	24	Sunday Night	SEVEN	105000	3	0	3	33.3	3.0
“	Two and a Half Men	NINE	12000	1	0	1	.0	2.0	“	Postcards	NINE	103000	0	0	0	.0	0.0

*AUD = Audience according to OzTAM data

Table 31 Top 25 most popular programs for children and adults in July 2010 for Adelaide free-to-air television showing the network, Average Daily Audience (AUD), total number of food advertisements (N), the proportion (%) of non-core advertisements and frequency per hour of food advertisements

Jul-10																	
Children									Adults								
Rank	Program	Network	AUD	Food Ads	Sponsor ship	Total	% Non-core	Food Ads /h	Rank	Program	Network	AUD	Food ads	Sponsor ship	Total	% Non-core	Food Ads /h
1	MasterChef Australia - Finale Night	TEN	52000	14	0	14	42.9	9.3	1	MasterChef Australia - Winner Announced	TEN	368000	6	0	6	66.7	12.0
2	MasterChef Australia - Winner Announced	TEN	46000	6	0	6	66.7	12.0	2	MasterChef Australia - Finale Night	TEN	321000	14	0	14	42.9	9.33
3	Undercover Boss	TEN	28000	10	0	10	80.0	10.0	3	Packed to the Rafters	SEVEN	206000	10	0	10	30.0	10.0
4	Modern Family	TEN	26000	2	0	2	50.0	4.0	4	Seven News Sun	SEVEN	178000	0	0	0	0	0.0
5	Rules Of Engagement	TEN	21000	2	0	2	.0	4.0	5	Today Tonight	SEVEN	172000	6	0	6	33.3	12.0
“	The Simpsons	TEN	21000	3	0	3	100.0	6.0	6	Seven News	SEVEN	165000	3	0	3	66.7	6.0
7	Neighbours	TEN	20000	2	1	3	66.7	6.0	“	Undercover Boss - Premiere	TEN	163000	0	0	0	0	0.0
8	The Simpsons	TEN	19000	4	0	4	75.0	8.0	8	Seven News	SEVEN	160000	3	0	3	66.7	6.0
“	Minute To Win It	SEVEN	19000	9	0	9	77.8	9.0	9	Today Tonight	SEVEN	158000	3	0	3	33.3	6.0
10	A Current Affair	NINE	18000	2	0	2	100.0	4.0	10	2010 AFL – Pt Adelaide vs Adelaide	SEVEN	157000	26	1	27	70.4	9.0
11	Neighbours	TEN	18000	2	1	3	100.0	6.0	11	Criminal Minds - Dbl	SEVEN	149000	7	0	7	71.4	7.0
12	Bee Movie	NINE	16000	14	0	14	71.4	7.0	12	Undercover Boss	TEN	143000	10	0	10	80.0	10.0
“	Home and Away	SEVEN	16000	5	0	5	100.0	10.0	13	Home and Away	SEVEN	135000	5	0	5	100.0	10.0
“	The Simpsons	TEN	16000	1	0	1	100.0	2.0	14	Nine News Sat	NINE	130000	4	0	4	75.0	8.0
“	Top Gear	NINE	16000	10	1	11	63.6	7.3	“	Under the Hammer - Premiere	SEVEN	128000	0	0	0	0	0.0
“	Packed To The Rafters	SEVEN	16000	10	0	10	30.0	10.0	16	Top Gear	NINE	128000	10	1	11	63.6	11.0
17	Australia’s Funniest Home Videos	NINE	15000	11	0	11	45.5	11.0	17	Nine News	NINE	125000	3	0	3	33.3	6.0
“	Seven News	SEVEN	15000	0	0	0	0.0	0.0	18	Nine News Sun	NINE	123000	1	0	1	.0	2.0
“	The 7pm Project	TEN	15000	3	0	3	33.3	6.0	19	Highway Patrol	SEVEN	122000	2	0	2	100.0	4.0
20	Home and Away	SEVEN	14000	2	0	2	100.0	4.0	20	Seven News	SEVEN	119000	2	0	2	50.0	4.0
“	Modern Family	TEN	14000	4	0	4	75.0	8.0	21	Minute to Win It	SEVEN	119000	9	0	9	77.8	9.0
22	101 Dalmatians	SEVEN	13000	12	1	13	38.5	5.6	22	Home and Away	SEVEN	118000	2	0	2	100.0	4.0
“	Nine News	NINE	13000	3	0	3	33.3	6.0	23	Criminal Minds - Dbl	SEVEN	117000	11	0	11	27.3	11.0
24	2010 AFL – Pt Adelaide vs Adelaide	SEVEN	12000	26	1	27	70.4	9.0	24	A Current Affair	NINE	110000	2	0	2	100.0	4.0
25	Good News Week	TEN	11000	11	0	11	81.8	7.3	25	NCIS	TEN	110000	18	0	18	66.7	18.0

*AUD = Audience according to OzTAM data

c) During C, P and G rated programs?

As advertisements are not permitted (according to the Australian Children's Television Standards) to be broadcast during preschool (P) periods including P-rated programs, the datasets contained little information regarding the broadcast of P-rated programs. Ratings data were not available for all programs, therefore any rating data represents a slightly different dataset as there are a number of missing values.

No programs classified as having a Children (C) rating were contained in the AC Nielsen data sets (Oct 2008 & May 2009). At other time points, the number of C-rated programs during which advertisements were broadcast was relatively low, ranging from between 6 (October 2009) and 15 (March 2010). As the current database only contains information corresponding to when advertisements were broadcast, it is unclear whether C-rated programs were broadcast which contained no advertisements. General (G) rated programs appeared to be more common, with between 59 (October 2009) and 76 (March 2010) G-rated programs containing advertisements across the time points.

Adelaide FTA

G-rated programs were broadcast across all of the time slots captured in the current data (6AM to 10PM). The number of food advertisements by channel, time slot, and time point, on G-rated FTA television in Adelaide, is shown in Figure 19. There is limited data available for October 2008 and May 2009, with very few food advertisements captured. The other data points (Feb and Oct 2009, Mar and July 2010) show relatively similar patterns of food advertising during the day. There appears to be two peaks in food advertising during G-rated programs, one in the morning hours between 0600-0900 and one in the late afternoon/evening between 1600-1930. These peaks may correspond to the broadcast of more G-rated viewing during these time slots.

There were noticeably fewer total (including non-food advertisements; see Table 32) and food advertisements (Figure 20) shown during children's (C) FTA television in Adelaide which reflects the low number of C-rated programs broadcast across the time points. A few time points stand out as having more food advertisements, between 0700-0730 and 1600-1630. This coincides with higher numbers of all advertisements during children's programs in these time slots.

There appears to be two peaks in food advertising during general (G) programs, between 0600-0900 and between 1600-1930. During children's programs (C) food advertisements peak between 0700-0730 and 1600-1630.

Table 33 shows the number of advertisements during C, P and G-rated programs compared to all other programming on Adelaide FTA over the time points. Although advertisements are not permitted to be broadcast during P programs on Australian FTA, in the data collected for July 2010 there were two advertisements during P programs, one non-food and one food company sponsorship advertisement.

At each time point, children's programs contain very few advertisements (between 0 and 256) compared with general programs (between 10 and 2970). Non-food advertisements account for the majority of total advertisements during general programs (83.9%) and during children's programs (93.4%). In total, there were more food advertisements shown during general programs (1723, 15.4%) compared to children's programs (44, 6.3%), and of these 59.4% and 47.7% were for non-core foods in general and children programs, respectively.

Between 2009 and 2010 the amount of non-core food advertising, as a proportion of food advertisements, has not changed much during both children's and general programs. In 2009, non-core food advertisements during children's programs made up 12.5-66.7% (n=1-10) of food advertisements, and in 2010 made up 22.2-66.7% (n=2-21) of food advertisements. During general programs, in 2009, 50.0-68.2% (n=5-253) of advertisements were for non-core foods, compared to 57.1-58.1% (n=234-268) in 2010. These proportions are similar to non-core food advertising in other, not classified, programs (Table 33).

In summary, considering children's (C) and general (G) programs, there are two peaks for food advertising, one in the morning and one in the late afternoon/evening. Children's program contain much less advertising overall than general programs.

Food advertisements make up a small proportion of total advertisements (particularly in C-rated programs; see summary Figure 21), but about half (47.7% in C programs and 59.4% in G programs) of these are for non-core foods.

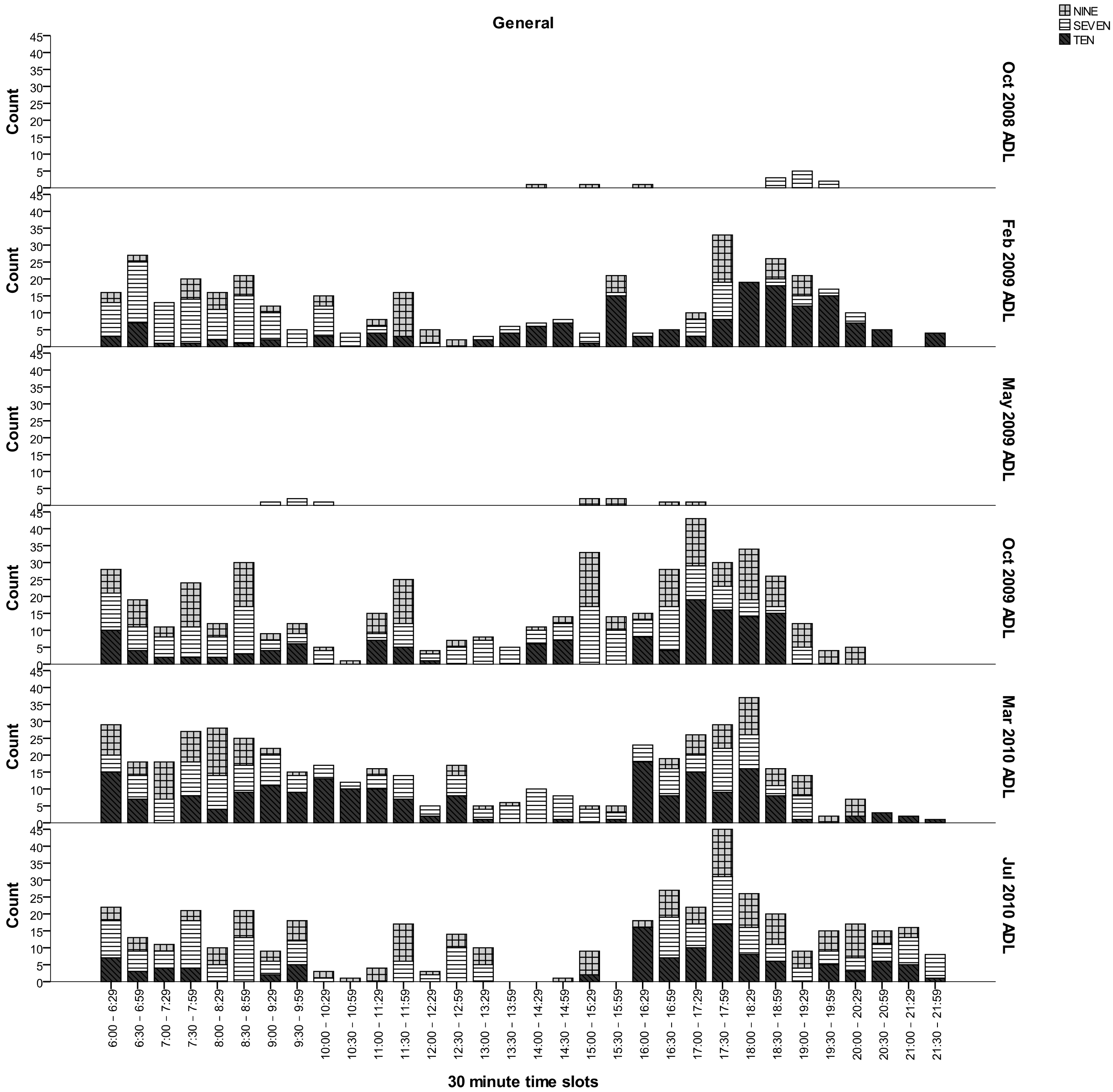

Figure 19 Number of food advertisements on General (G) rated programs by half hour time slot and data point on free-to-air television in Adelaide between Oct 2008 and July 2010 *NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements. Ratings were not available for all programs; data is only presented where rating data were available.*

Table 32 Number (N) of advertisements (food and non-food) during Children's (C) rated programs by channel and half hour time slot for Adelaide free-to-air television across time points

		Adelaide FTA*			
Channel	Time slot	Feb-09	Oct-09	Mar-10	Jul-10
NINE	6:00 – 6:29	0	0	11	14
	6:30 – 6:59	0	0	1	0
	7:00 – 7:29	9	0	0	0
	7:30 – 7:59	4	0	0	0
	10:00 – 10:29	6	0	9	0
	10:30 – 10:59	13	0	0	0
	11:00 – 11:29	0	14	2	0
	11:30 – 11:59	0	0	3	12
	12:00 – 12:29	0	0	6	12
	12:30 – 12:59	0	0	8	13
	13:00 – 13:29	0	0	7	14
	13:30 – 13:59	0	0	0	12
	14:00 – 14:29	0	0	0	9
	16:00 – 16:29	28	33	9	28
	16:30 – 16:59	0	11	0	0
	17:00 – 17:29	0	0	0	1
	Total	*60*	*58*	*56*	*115*
SEVEN	10:30 – 10:59	0	16	0	0
	11:00 – 11:29	12	13	0	14
	11:30 – 11:59	0	13	0	15
	16:00 – 16:29	22	32	19	20
	Total	*34*	*74*	*19*	*49*
TEN	7:00 – 7:29	7	0	30	14
	7:30 – 7:59	8	16	9	13
	8:00 – 8:29	14	0	8	21
	8:30 – 8:59	9	0	10	13
	9:00 – 9:29	2	0	12	17
	9:30 – 9:59	10	9	0	14
	Total	*50*	*25*	*69*	*92*

Note: Ratings were not available for all programs; data is only presented where rating data were available.
*There were no advertisements captured in the AC Nielsen data sets (October 2008; May 2009).

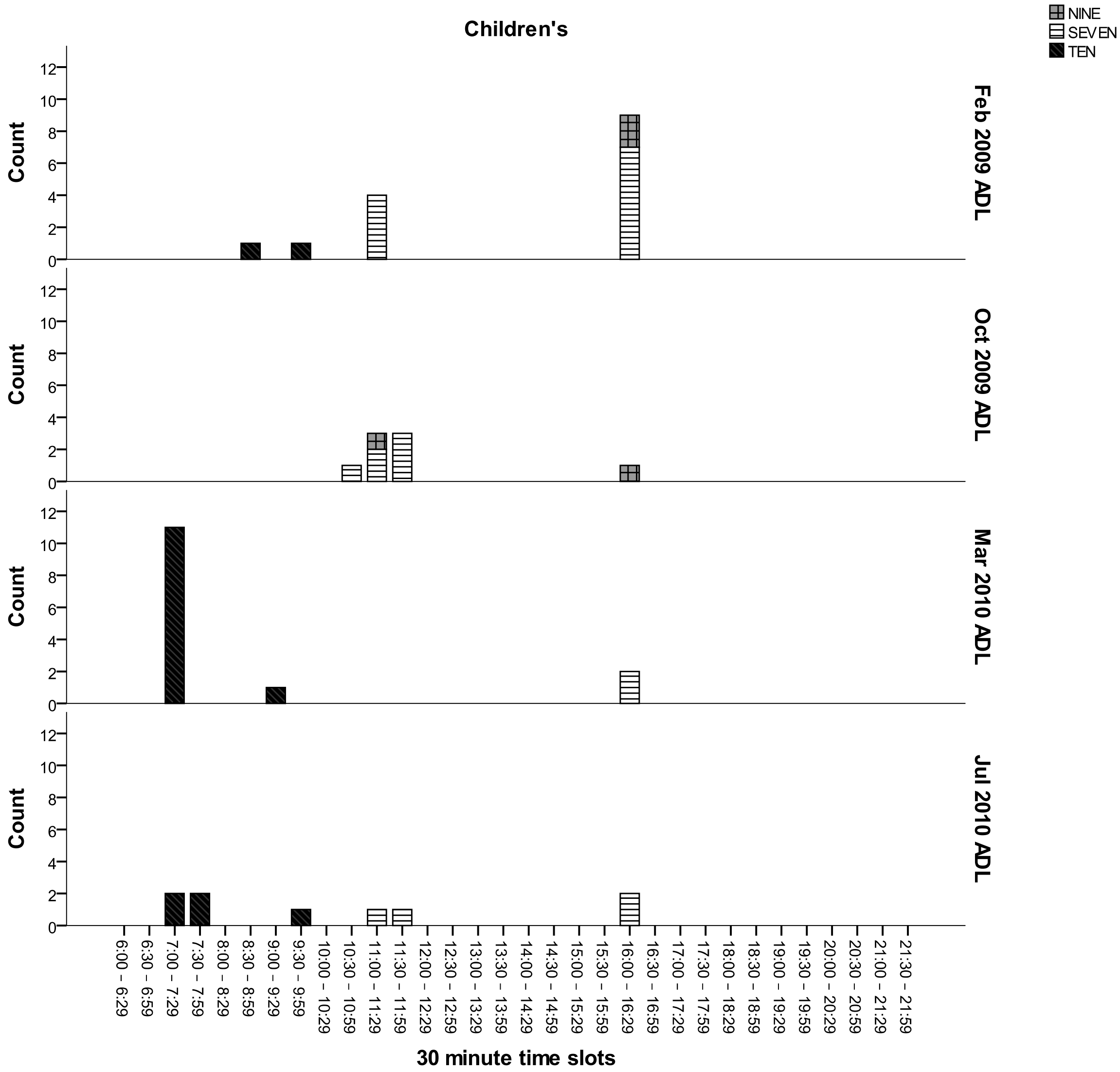

Figure 20 Number of food advertisements on Children's (C) rated programs by half hour time slot and data point on free-to-air television in Adelaide between Oct 2008 and July 2010 *NB October 2008 and May 2009 are produced from AC Nielsen data which had no advertisements during Children's Programs. Ratings were not available for all programs; data is only presented where rating data were available.*

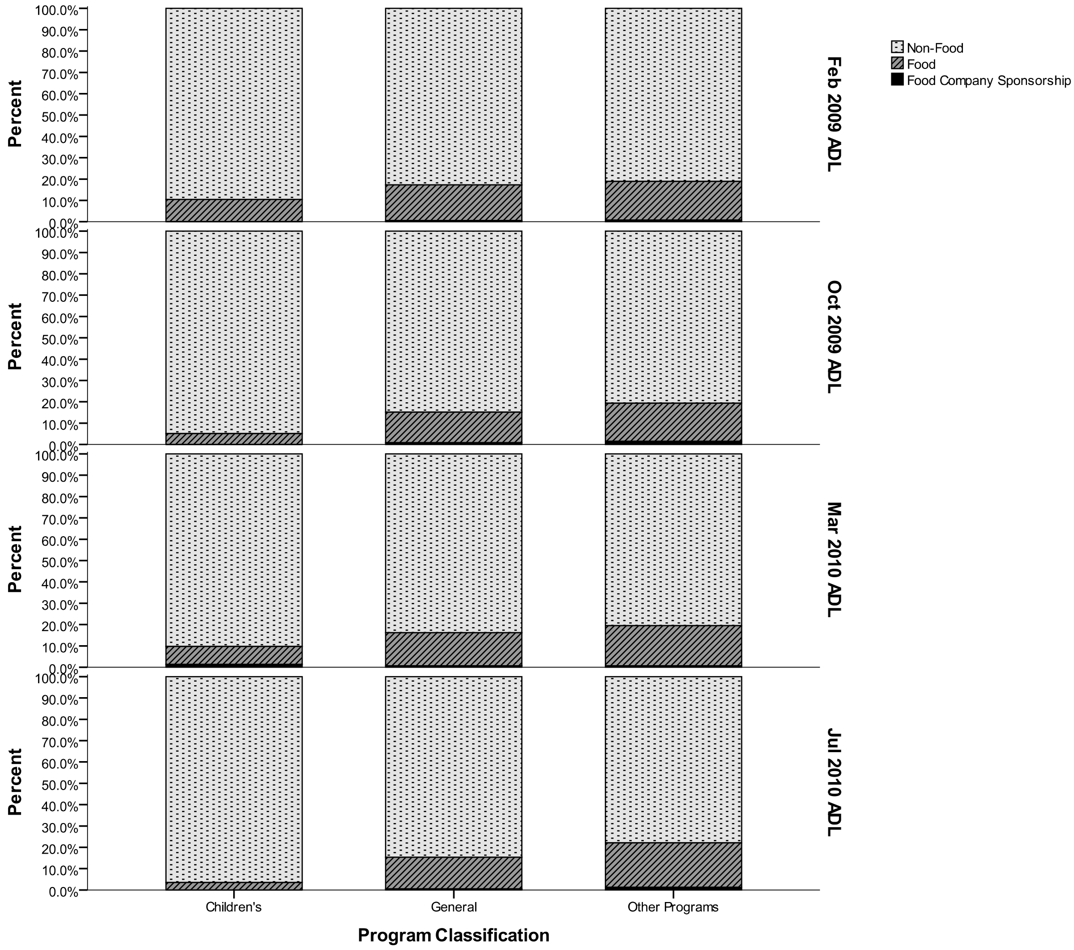

Figure 21: Proportion (%) of total advertisements that were food, non-food and food sponsorship advertisements by different program classifications and data points for Adelaide free-to-air television *NB October 2008 and May 2009 are produced from AC Nielsen data which had no non-food advertisements and is therefore excluded from the current figure. Ratings were not available for all programs; data is only presented where rating data were available.*

Table 33 Number (n) and percentage (%) of advertisements (for non-food, food, non-core and total) during Children's (C), Pre-School (P) and General (G) programs compared to all other programming on Adelaide free-to-air television across time points between Oct 2008 and July 2010

		Oct-08		Feb-09		May-09		Oct-09		Mar-10		Jul-10		Total	
		n	%	n	%	n	%	n	%	n	%	n	%	n	%
Children's	Non-Food	0	.0	129	89.6	0	.0	149	94.9	130	90.3	247	96.5	655	93.4
	Food	0	.0	15	10.4	0	.0	8	5.1	12	8.3	9	3.5	44	6.3
	Non-core(%Food)	*0.0*	*0.0*	*10.0*	*66.7*	*0.0*	*0.0*	*1.0*	*12.5*	*8.0*	*66.7*	*2.0*	*22.2*	*21.0*	*47.7*
	Food Company Sponsorship	0	.0	0	.0	0	.0	0	.0	2	1.4	0	.0	2	.3
	Total	0	.0	144	100.0	0	.0	157	100.0	144	100.0	256	100.0	701	100.0
General	Non-Food	0	.0	1832	82.7	0	.0	2715	84.9	2489	83.8	2337	84.6	9373	83.9
	Food	13	100.0	371	16.7	10	100.0	458	14.3	461	15.5	410	14.8	1723	15.4
	Non-core	*7.0*	*53.8*	*253.0*	*68.2*	*5.0*	*50.0*	*256.0*	*55.9*	*268.0*	*58.1*	*234.0*	*57.1*	*1023.0*	*59.4*
	Food Company Sponsorship	0	.0	12	.5	0	.0	26	10.2	20	7.5	15	6.4	73	.7
	Total	13	100.0	2215	100.0	10	100.0	3199	100.0	2970	100.0	2762	100.0	11169	100.0
Pre-school	Non-Food	0	.0	0	.0	0	.0	0	.0	0	.0	1	50.0	1	50.0
	Food Company Sponsorship	0	.0	0	.0	0	.0	0	.0	0	.0	1	50.0	1	50.0
	Total	0	.0	0	.0	0	.0	0	.0	0	.0	2	100.0	2	100.0
Other Programs	Non-Food	0	.0	2006	81.1	0	.0	2284	80.7	1859	80.5	1859	77.9	8008	76.4
	Food	235	1000	450	18.2	246	100.0	504	17.8	436	18.9	497	20.8	2368	22.6
	Non-core	*132.0*	*56.2*	*288.0*	*64.0*	*173.0*	*70.3*	*293.0*	*58.1*	*264.0*	*60.6*	*311.0*	*62.6*	*1461.0*	*61.7*
	Food Company Sponsorship	0	.0	19	.8	0	.0	43	1.5	15	.6	30	1.3	107	1.0
	Total	235	100.0	2475	100.0	246	100.0	2831	100.0	2310	100.0	2386	100.0	10483	100.0

†Data collected by AC Nielsen – fewer-food ads
Note: *Ratings were not available for all programs; data is only presented where rating data were available.*

Whyalla FTA

The number of food advertisements by channel, time slot and time point on general (G) FTA television in Whyalla is shown in Figure 22. Data for Whyalla is available from two channels, for Feb 2009, March 2010 and July 2010. Similar to Adelaide, there is evidence of two peaks of food advertisements during general programs. However, the peaks are not as clear as for Adelaide, in particular least clear in the March 2010 data.

The number of advertisements during children's programs (C) on Whyalla FTA is highest between 0700-0800 and 1600-1630 (Table 34). The number of food advertisements is highest in the morning, between 6:30 and 8:30am (Figure 23).

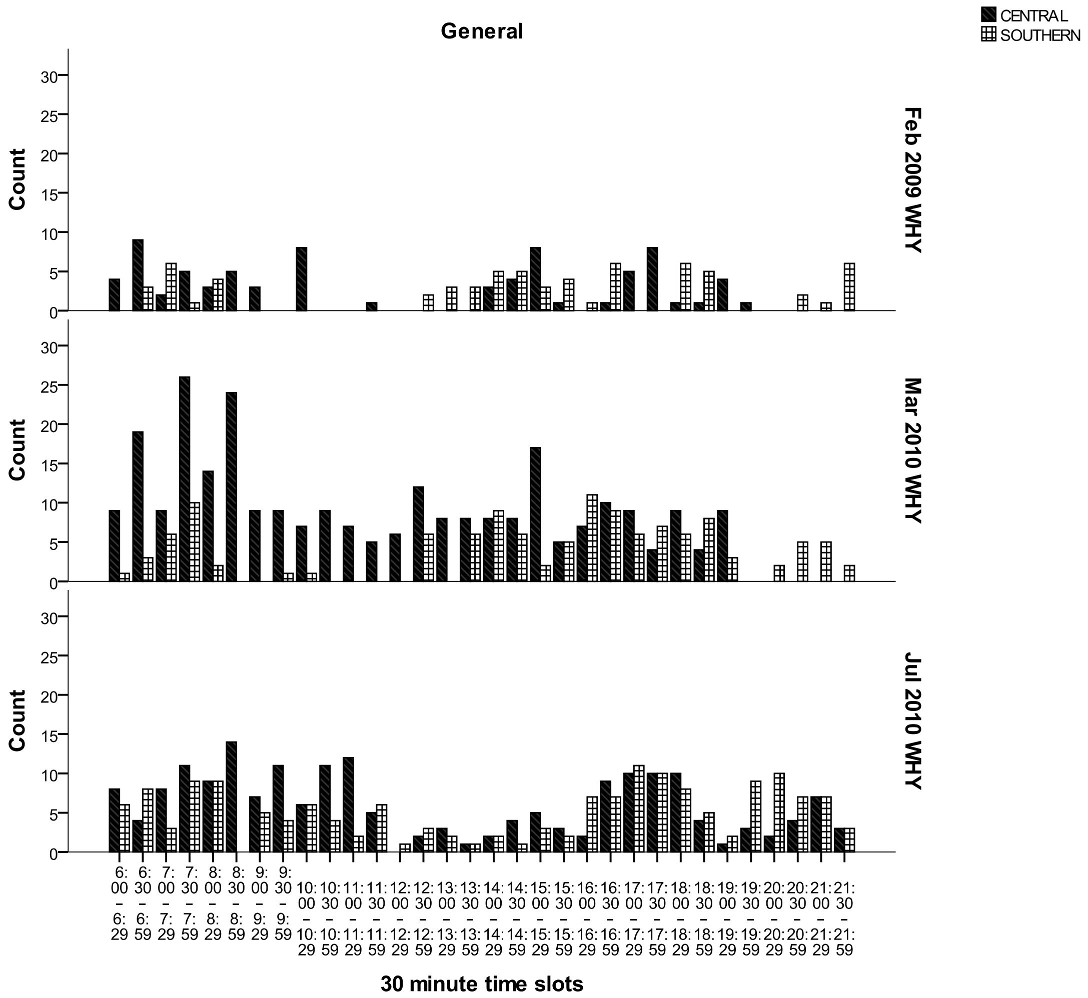

Figure 22 Number of food advertisements on General (G) rated programs by half hour time slot and data point on free-to-air television in Whyalla between Feb 2009 and July 2010 Note: *Ratings were not available for all programs; data is only presented where rating data were available.*

Table 34 Number (N)of advertisements (food and non-food) during Children's (C) rated programs by channel and half hour time slot for Whyalla free-to-air television across time points

		Whyalla FTA		
Channel	Time slot	Feb-09	Mar-10	Jul-10
CENTRAL	6:30 – 6:59	0	0	21
	10:30 – 10:59	14	0	0
	11:00 – 11:29	14	0	0
	14:00 – 14:29	1	0	0
	16:00 – 16:29	27	12	0
	Total	*56*	*12*	*21*
SOUTHERN	7:00 – 7:29	18	0	11
	7:30 – 7:59	26	0	10
	8:00 – 8:29	19	0	0
	8:30 – 8:59	9	0	0
	9:00 – 9:29	21	0	0
	9:30 – 9:59	14	0	12
	Total	*89*	*0*	*22*

Note: Ratings were not available for all programs; data is only presented where rating data were available.

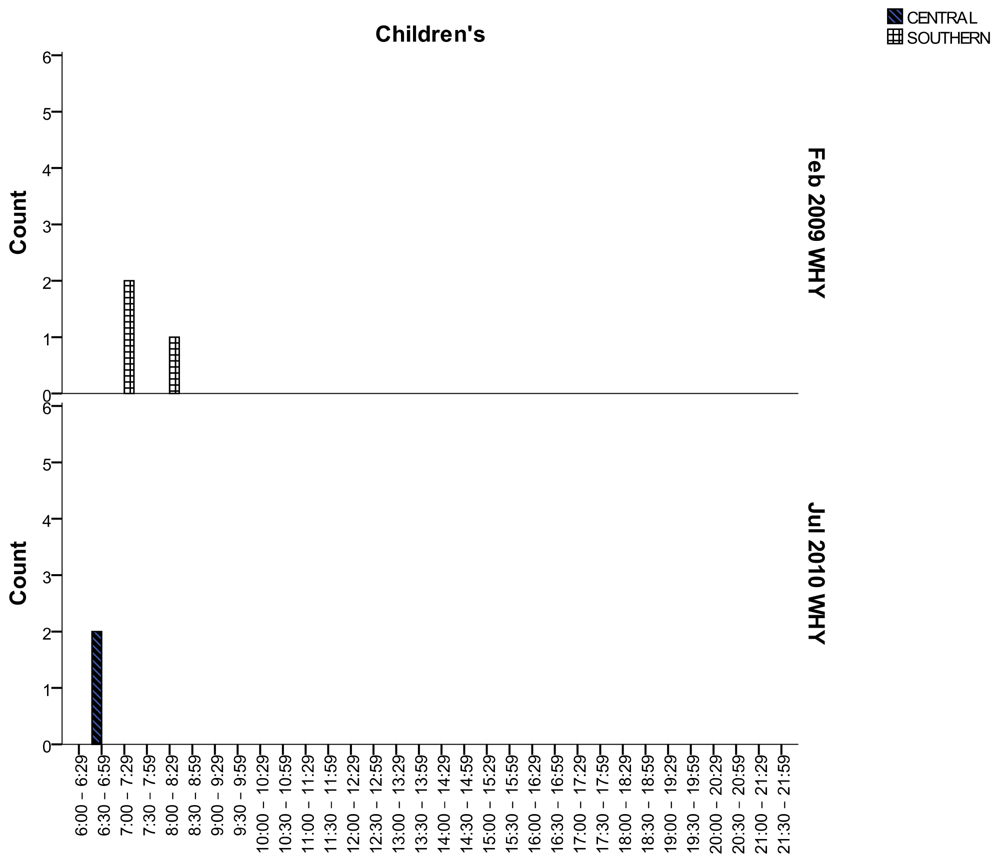

Figure 23 Number of food advertisements on Children's (C) rated programs by half hour time slot and data point on free-to-air television in Whyalla between Feb 2009 and July 2010 *Ratings were not available for all programs; data is only presented where rating data were available.*

Table 35 Number (n) and percentage (%) of advertisements (for non-food, food, non-core and total) during Children's (C) and General (G) programs compared to all other programming on Whyalla free-to-air television across time points between Feb 2009 and July 2010.

		Whyalla FTA							
		Feb-09		Mar-10		Jul-10		Total	
		n	%	n	%	n	%	n	%
Children's	Non-Food	160	98.2	12	100.0	52	96.3	224	97.8
	Food	3	1.8	0	.0	2	3.7	5	2.2
	Non-core (%Food)	3	100.0	0	.0	2	100.0	5	100.0
	Total	163	100.0	12	100.0	54	100.0	229	100.0
General	Non-Food	906	86.4	1500	79.2	2040	85.2	4446	83.3
	Food	141	13.4	393	20.8	352	14.7	886	16.6
	Non-core (%Food)	127	90.1	275	70.0	224	63.6	626	70.7
	Food Company Sponsorship	2	.2	0	.0	2	.1	4	.1
	Total	1049	100.0	1893	100.0	2394	100.0	5336	100.0
Other Programs	Non-Food	1474	83.8	1193	77.4	919	84.2	3586	81.6
	Food	280	15.9	348	22.6	173	15.8	801	18.2
	Non-core (%Food)	251	89.6	245	70.4	104	60.1	600	74.9
	Food Company Sponsorship	5	.3	0	.0	0	.0	5	.1
	Total	1759	100.0	1541	100.0	1092	100.0	4392	100.0

Note: Ratings were not available for all programs; data is only presented where rating data were available.

Table 35 shows the number of advertisements during children's and general programs compared to all other programming on Whyalla FTA over the time points. There were no pre-school programs captured in the data. At each time point children's programs contain less total advertisements (12-229) than general programs (1049-5336). Non-food advertisements accounted for the majority of total advertisements, both during general programs (83.3%, n=4446) and during children's programs (97.8%, n=224). There were more food advertisements shown during general programs (16.6%, n=886) compared to children's programs (2.2%, n=5), and of these 70.7% and 100% were for non-core foods in general and children programs, respectively. Interestingly, all food advertising during children's programs was for non-core foods.

There is only one time point for Whyalla in 2009 and two in 2010 so a comparison between years should be interpreted with caution. Because non-core food advertising accounted for 100% of food advertisements in children's programs at all time points, it was higher than non core food advertising during other programs. Most recently, in July 2010, non-core food advertising in general and other programs made up 60.1-63.6% of all food advertisement, compared to 100% in children's programs (Table 35).

In summary, in Whyalla, food advertisements make up a small proportion of total advertisements (2-17% during both children's (C) and general (G) programs), but most of these are for non-core foods (100% in C programs and 70.7% in G programs).

Comparison of advertising rates over time and between Adelaide and Whyalla

The rates of different types of advertising during children's (C), pre-school (P) and general (G) programs compared to other programs, in Adelaide and Whyalla are shown in Table 36 and Table 37.

In both Adelaide and Whyalla, the rate of food advertising was higher during general programs compared to children's programs. In Adelaide, the rate of food advertising in general programs was between 0.05 and 2.40 ads/hr compared to 0.00-0.08 ads/hr in children's programs. During other programs the rates of food advertising range between 1.22 and 2.63 ads/hr.

With the exception of Oct 2008 and May 2009 data which have much lower rates of advertising than other months (possibly due to the different data collection methods), there appears to have been no change in the rates of food advertising or non-core food advertising between 2009 (Feb and Oct only) and 2010 (Mar and July) in children's and general programs. During general programs, the rate of non-core food advertising was 1.93-2.39 ads/hr in 2009 compared to 2.14-2.40 ads/hr in 2010. The rate of advertising during general programs was higher than other programs and children's programs. During children's programs the rate of non-core food advertising was 0.01-0.05 ads/hr in 2009, and 0.01-0.04 ads/hr in 2010.

In Whyalla, the rate of non-core food advertising was 0.99 ads/hr in Feb 2009 and 1.75-2.15ads/hr in 2010 during general programs, and 0.02ads/hr in 2009 and 0.00-0.02ads/hr in 2010 in children's programs.

In summary, the rates of non-core food advertising are higher during general programs (G) compared to children's programs (C). There appears to have been no change in the rate of food advertising or non-core food advertising between 2009 and 2010 in both children's and general programs.

Table 36 Frequency (rate) per hour of advertising (non-food, food, non-core, and food sponsorship) during Children's (C), General (G) and Pre-School (P) programs compared to all other programming on Adelaide free-to-air television across time points between Oct 2008 and July 2010.

		Adelaide FTA					
		Oct-08	Feb-09	May-09	Oct-09	Mar-10	Jul-10
Children's	Non-Food	-	0.67	-	0.78	0.68	1.29
	Food	-	0.08	-	0.04	0.06	0.05
	Non-core	-	0.05	-	0.01	0.04	0.01
	Food Company Sponsorship	-	0.00	-	0.00	0.01	0.00
General	Non-Food	0.00	9.54	0.00	14.14	12.96	12.17
	Food	0.07	1.93	0.05	2.39	2.40	2.14
	Non-core	0.04	1.32	0.03	1.33	1.40	1.22
	Food Company Sponsorship	0.00	0.06	0.00	0.14	0.10	0.08
Pre-school	Non-Food	-	-	-	-	-	0.01
	Food Company Sponsorship	-	-	-	-	-	0.01
	Total	-	-	-	-	-	0.01
Other Programs	Non-Food	-	10.45	-	11.90	9.68	9.68
	Food	1.22	2.34	1.28	2.63	2.27	2.59
	Non-core	0.69	1.50	0.90	1.53	1.38	1.62
	Food Company Sponsorship	-	0.10	-	0.22	0.08	0.16

^Divided by 192 for all days and channels
Note: *Ratings were not available for all programs; data is only presented where rating data were available.*

Table 37 Frequency (rate) per hour of advertising (non-food, food, non-core, and food sponsorship) during Children's (C) and General (G) programs compared to all other programming on Whyalla free-to-air television across time points between Oct 2008 and July 2010..

		Whyalla FTA		
		Feb-09	Mar-10	Jul-10
Children's	Non-Food	1.25	0.09	0.41
	Food	0.02	0.00	0.02
	Non-core	0.02	0.00	0.02
General	Non-Food	7.08	11.72	15.94
	Food	1.10	3.07	2.75
	Non-core	0.99	2.15	1.75
	Food Company Sponsorship	0.02	0.00	0.02
Other Programs	Non-Food	11.52	9.32	7.18
	Food	2.19	2.72	1.35
	Non-core	1.96	1.91	0.81
	Food Company Sponsorship	0.04	0.00	0.00

^Divided by 128 for all days and channels
Note: Ratings were not available for all programs; data is only presented where rating data were available.

d) During peak viewing times for children aged 0 to 14 years on Pay TV?

The peak viewing times for Pay TV for children in Adelaide using audience data provided by OzTAM. Audience data were separated for two ages groups: children aged 0 to 4 years old and those 5 to 12.

The peaks for Pay TV were different to those seen in FTA (see Appendix C) therefore peak times were classified as those where the number of children viewing television (on all channels combined) was greater than 75% of the maximum child audience rating for the entire day. This cut-off also replicated the one used by PANORG for the report of Pay TV advertising in 2008 [11]. As with Adelaide FTA, the peak viewing times for 2009 audience data were applied to the analysis of 2010 databases as no audience data were available for 2010. The peak viewing times calculated by PANORG were applied to the 2008 data.

A summary of peak viewing times in Adelaide for Pay TV on weekdays and weekends is shown in Table 23.

Table 38: Peak viewing times for children aged 0-4 year on weekdays and weekends for Adelaide Pay TV in 2008 and 2009

	Children 0-4 years	
	2008	2009
Weekdays	0730-1030	0730-0900
	1600-1900	1630-1900
Weekends	0800-1100	0800-1100

NB: For the 2008 time point, peak viewing times are based on the annual average audience data for Adelaide 2008. For the 2009 and 2010 time point, peak viewing times are based on the annual average audience data for Adelaide 2009.

Table 39: Peak viewing times for children aged 5-12 year on weekdays and weekends for Adelaide Pay TV in 2008 and 2009

	Children 5-12 years	
	2008	2009
Weekdays	1600-2000	1700-1900
Weekends	0800-1200	0830-1130

NB: For the 2008 time point, peak viewing times are based on the annual average audience data for Adelaide 2008. For the 2009 and 2010 time point, peak viewing times are based on the annual average audience data for Adelaide 2009.

The total number of food advertisements and rate of advertisements per hour (ads/hr), during children's peak and non-peak viewing times on Pay TV is shown in Table 40. The time points included for Pay TV were February 2009, March 2010 and July 2010.

Table 40: Total number (rate per hour) of food advertising (core, non-core, miscellaneous and total) during children's peak and non-peak viewing times (0-4 year olds) in Adelaide for Pay TV across time points between Feb 2009 and July 2010.

		Pay TV – children 0-4 yrs					
		Feb 2009		Mar 2010		Jul 2010	
Outside of peak viewing hours	Core	55	(0.17)	163	(0.51)	47	(0.15)
	Non-core	201	(0.63)	400	(1.25)	282	(0.88)
	Miscellaneous	24	(0.08)	14	(0.04)	20	(0.06)
	Total	280	(0.88)	577	(1.80)	349	(1.09)
Is within peak viewing hours	Core	16	(0.05)	51	(0.16)	22	(0.07)
	Non-core	60	(0.19)	88	(0.28)	90	(0.28)
	Miscellaneous	9	(0.03)	4	(0.01)	9	(0.03)
	Total	85	(0.27)	143	(0.45)	121	(0.38)
Total	Core	71	(0.22)	214	(0.67)	69	(0.22)
	Non-core	261	(0.82)	488	(1.53)	372	(1.16)
	Miscellaneous	33	(0.10)	18	(0.06)	29	(0.09)
	Total	365	(1.14)	720	(2.25)	470	(1.47)

^Divided by 320 for all days and channels

The total rate of advertisements per hour was 1.14 in February 2009 and 1.47 in July 2010, but spiked in between – in March 2010 the rate was 2.25 ads/hr. The rate of non-core food advertising was highest, ranging from 0.82-1.53 ads/hr, compared to the rate for core foods (0.22-0.67) and miscellaneous products (0.06-0.10).

Peak viewing times for children differs by age, therefore, the data for Pay TV is subdivided into data for children aged 0-4 years and children aged 5-12 years (Table 41; Figure 24 and Figure 25). Figures 16 and 17 show the total numbers of advertising during peak and outside of peak viewing times for the three time points. As can be seen there were more advertisements shown outside of peak viewing hours compared to within peak viewing times.

Table 41: Total number (rate per hour) of food advertising (core, non-core, miscellaneous and total) during children's peak and non-peak viewing times (5-12 year olds) in Adelaide for Pay TV across time points between Feb 2009 and July 2010.

		Pay TV – children 5-12 yrs					
		Feb 2009		Mar 2010		Jul 2010	
Outside of peak viewing hours	Core	62	(0.19)	171	(0.53)	55	(0.17)
	Non-core	223	(0.70)	429	(1.34)	309	(0.97)
	Miscellaneous	24	(0.08)	14	(0.04)	23	(0.07)
	Total	309	(0.97)	614	(1.92)	387	(1.21)
Is within peak viewing hours	Core	9	(0.03)	43	(0.13)	14	(0.04)
	Non-core	38	(0.12)	59	(0.18)	63	(0.20)
	Miscellaneous	9	(0.03)	4	(0.01)	6	(0.02)
	Total	56	(0.18)	106	(0.33)	83	(0.26)
Total	Core	71	(0.22)	214	(0.67)	69	(0.22)
	Non-core	261	(0.82)	488	(1.53)	372	(1.16)
	Miscellaneous	33	(0.10)	18	(0.06)	29	(0.09)
	Total	365	(1.14)	720	(2.25)	470	(1.47)

^Divided by 320 for all days and channels

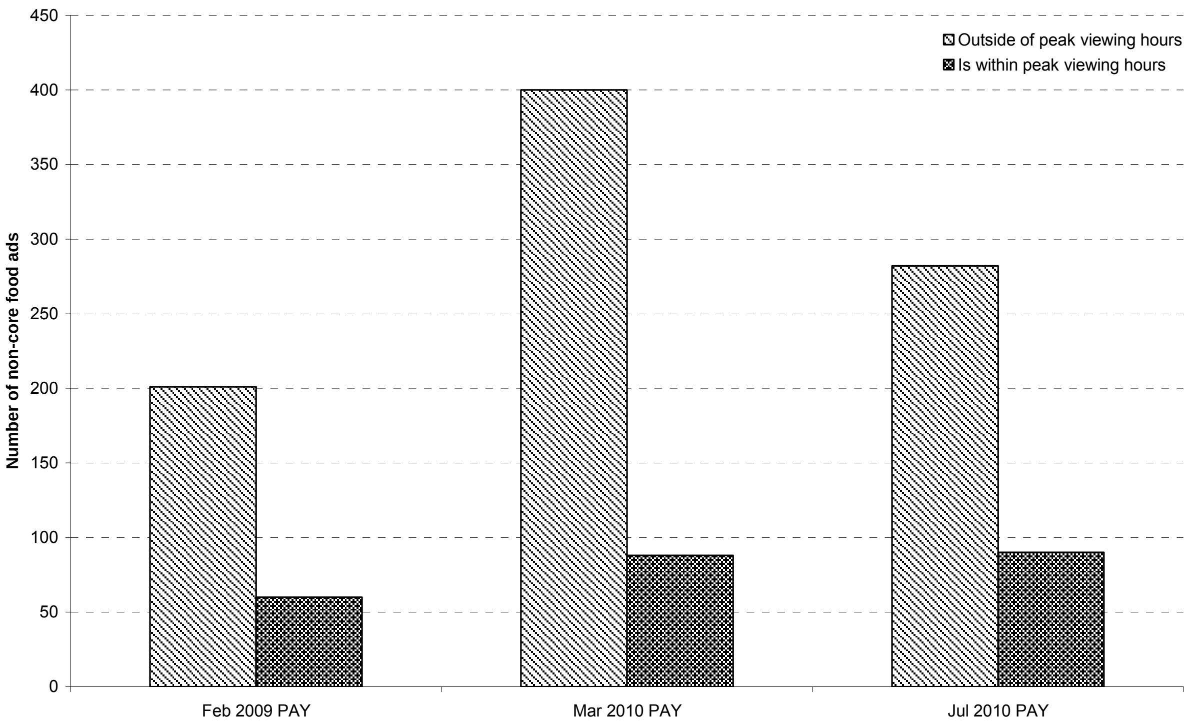

Figure 24: Number (N) of non-core food advertisements falling inside and outside of children's peak viewing times (0-4 year olds) across all time points for Adelaide Pay TV between Feb 2009 and July 2010.

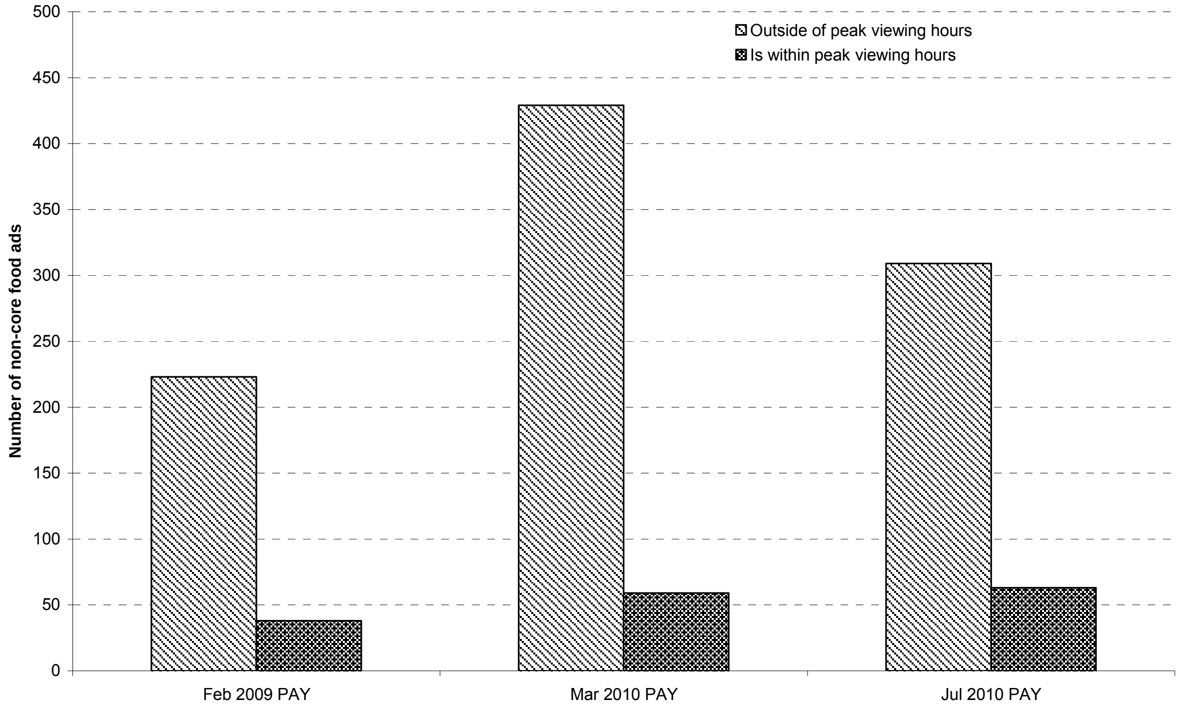

Figure 25: Number (N) of non-core food advertisements falling inside and outside of children's peak viewing times (5-12 year olds) across all time points for Adelaide Pay TV between Feb 2009 and July 2010.

Overall, there was a general increase in the rate of advertising over time in both peak and outside of peak viewing times, with a consistent peak in March 2010. The rate of food advertising during children aged 0-4 peak viewing hours was 0.27 in February 2009 and 0.38 in July 2010. Outside of peak viewing times the rate was higher – 0.88 in February 2009 and 1.09 in July 2010 (peaked at 1.80 in March 2010).

During older children's (5-12 years) peak viewing times the rate of advertising ranged from 0.18-0.33 ads/hr compared to 0.97-1.92 outside of peak viewing times.

Non-core food advertising accounts for a the majority of food advertising, regardless of children's age group, whether inside or outside peak viewing times, or the time point. For example, in July 2010, the rate of non-core food advertising outside of peak hours was 0.88 ads/hr for the younger children and 0.97 ads/hr for the older children (1.16 ads/hr overall), and for core foods 0.15, 0.07, and 0.22 ads/hr respectively. During peak viewing times the rate on non-core food advertising was also always higher than the rate of core food advertising, 0.28 ads/hr during young children's peak viewing times and 0.20 ads/hr during older children's peak viewing times.

It appears that overall the rate of non-core food advertising relative to core food advertising has increased. The proportion of the rate of non-core to core foods advertisements has increased from 3.7 to 1 in 2009 to 2.2 to 1 in March 2010 and 5.3 to 1 in July 2010.

On Pay TV, the rate of non-core food advertising was highest, ranging from 0.82-1.53 ads/hr, compared to the rate for core foods (0.22-0.67) and miscellaneous products (0.06-0.10). There were more advertisements shown outside of peak viewing hours compared to within peak viewing times.

Overall, there was a general increase in the rate of advertising over time in both peak and outside of peak viewing times, with a consistent peak in March 2010.

Non-core food advertising accounts for a the majority of food advertising, regardless of children's age group, whether inside or outside peak viewing times, or the time point. During peak viewing times the rate on non-core food advertising was also always higher than the rate of core food advertising.

It appears that overall the rate of non-core food advertising relative to core food advertising has increased. The proportion of the rate of non-core to core foods advertisements has increased from 3.7 to 1 in 2009 to 2.2 to 1 in March 2010 and 5.3 to 1 in July 2010.

What is the impact of non-core food advertising?

Non-core food impact was a measure of the exposure of children aged 0 to 14 years to advertising for less healthy ‘non-core’ food products. This measure was based on the HFSS (High Fat, Salt and Sugar) impacts developed by OfCom in the UK[5]. In this report, non-core food impacts were calculated by multiplying the number of non-core food advertisements broadcast during a half hour time slot (e.g. 1500-1530) by the audience for that half hour time slot. In order to replicate this method, the non-core impacts for the study periods were calculated for each half hour time slot on each FTA channel on weekdays and weekends. Audience data was used as a multiplier for the number of non-core advertisements (as opposed to average daily reach [ADR]) as this provides an indication of the number of children watching for the entire specified time period. Therefore, similar to the OfCom report, these results present non-core food impacts as an estimate of the exposure of children to non-core food advertisements broadcast during specific timeslots. A high impact can reflect either a larger audience or a higher number of non-core food advertisements, or a moderate combination of both.

<u>Adelaide FTA</u>

Figure 26 shows the number of non-core food impacts for each 30 minute time slot for weekdays and weekends from October 2008 to July 2010 on Adelaide FTA. Figure 27 shows the summed impacts. Non-core food impacts were highest between 1700 and 2200 on weekdays and on weekends which mostly corresponds with children’s peak viewing times. In the afternoon period, impacts were higher on weekdays compared to weekends. In the morning period, impacts were higher on weekends compared to weekdays.

Table 42 shows the total impact of non-core food advertisements during children’s peak and non-peak viewing hours from October 2008 to July 2010. The non-core impacts were higher during peak viewing hours compared with non-peak viewing hours for both weekdays (9,046,000 vs 1,412,000) and weekends (7,485,000 vs 2,239,000). As the frequency of non-core food advertisements is similar during children’s peak and non-peak viewing times, this difference is probably driven by the higher audience numbers during peak viewing times. The difference in impacts between peak and non-peak viewing times is more marked on weekdays.

Table 43 shows the daily average impact and rate by Adelaide FTA networks on weekdays and weekends from October 2008 to July 2010. The impact of non-core food advertising was highest on Channel 10 on weekdays and on weekends, followed by Channel 7 and Channel 9.

The impact of non-core advertising during the 25 most popular programs with children is shown in Table 44 to Table 49. More than 50% of the top 25 programs were screened on Channel 10. The five programs at each time point with the highest impact were mostly Channel 10 programs, except in July 2010 where one Channel 9 and one Channel 7 program were in the top five. At each time point there were between 2 and

7 programs in the top 25 with an impact of zero (e.g., Seven News, Rove, The Biggest Loser, Masterchef, Today Tonight, The Simpsons Saturday) which represents no non-core food advertising during these shows. Across all time points six of these were in the top 5 ranked programs and had a zero impact.

Where impact ranks varied from ratings ranks, the change was the result of higher non-core advertising. A clear example of this is seen in the July 2010 time point where the 24th ranked program (AFL: Port Adelaide v Adelaide) according to ratings was the 2nd ranked for impact. However, it should also be noted that the program duration for the AFL is 3 to 6 times that of regular programming.

In Adelaide, children's exposure to non-core food advertising, as measured by non-core food impacts, was higher during peak viewing hours compared with non-peak viewing hours for both weekdays and weekends.

Channel 10 consistently had the highest non-core food advertising impact.

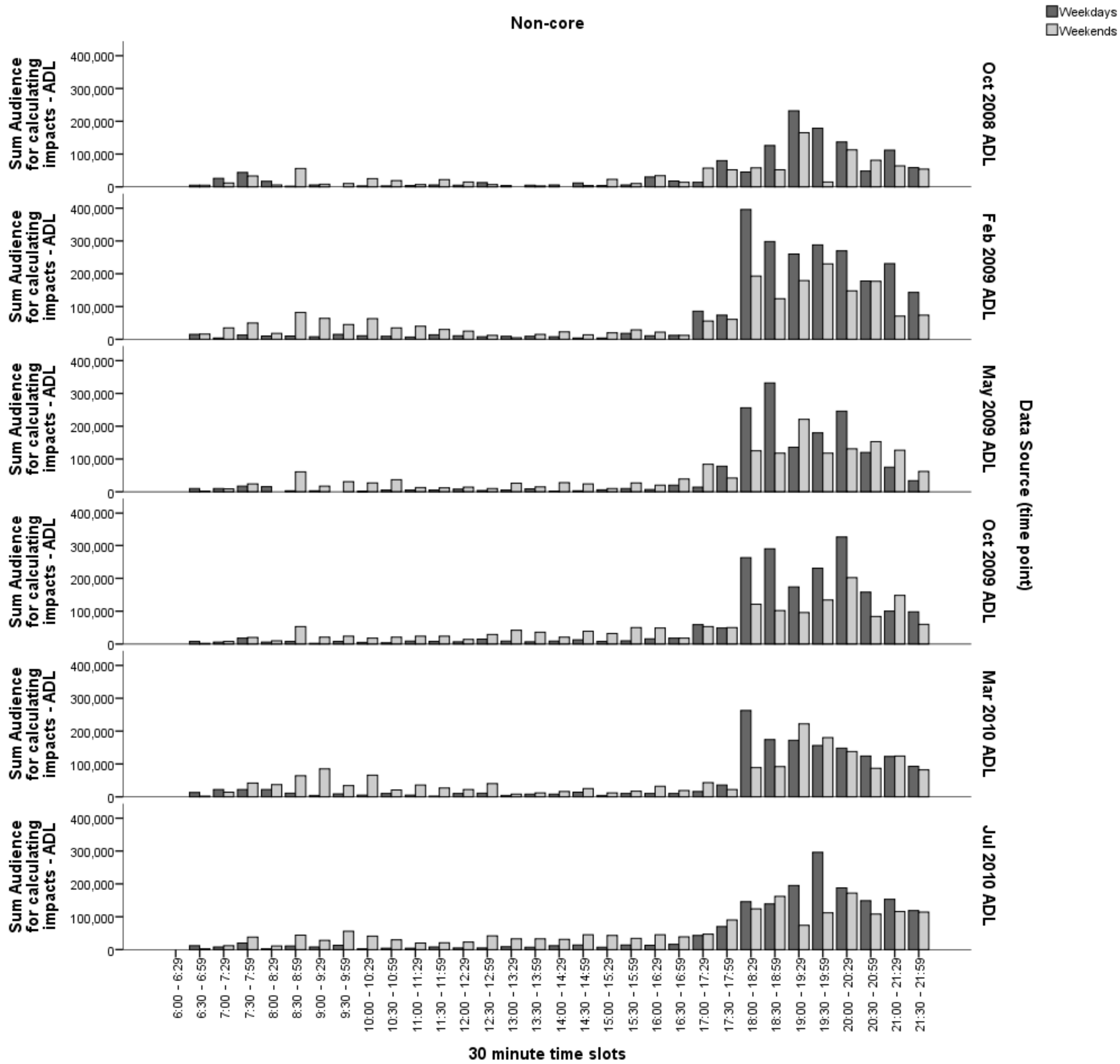

Figure 26 Non-core food impacts plotted for weekdays and weekends per half hour time slot on Adelaide free-to-air television across the time points between Oct 2008 and July 2010. *NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements*

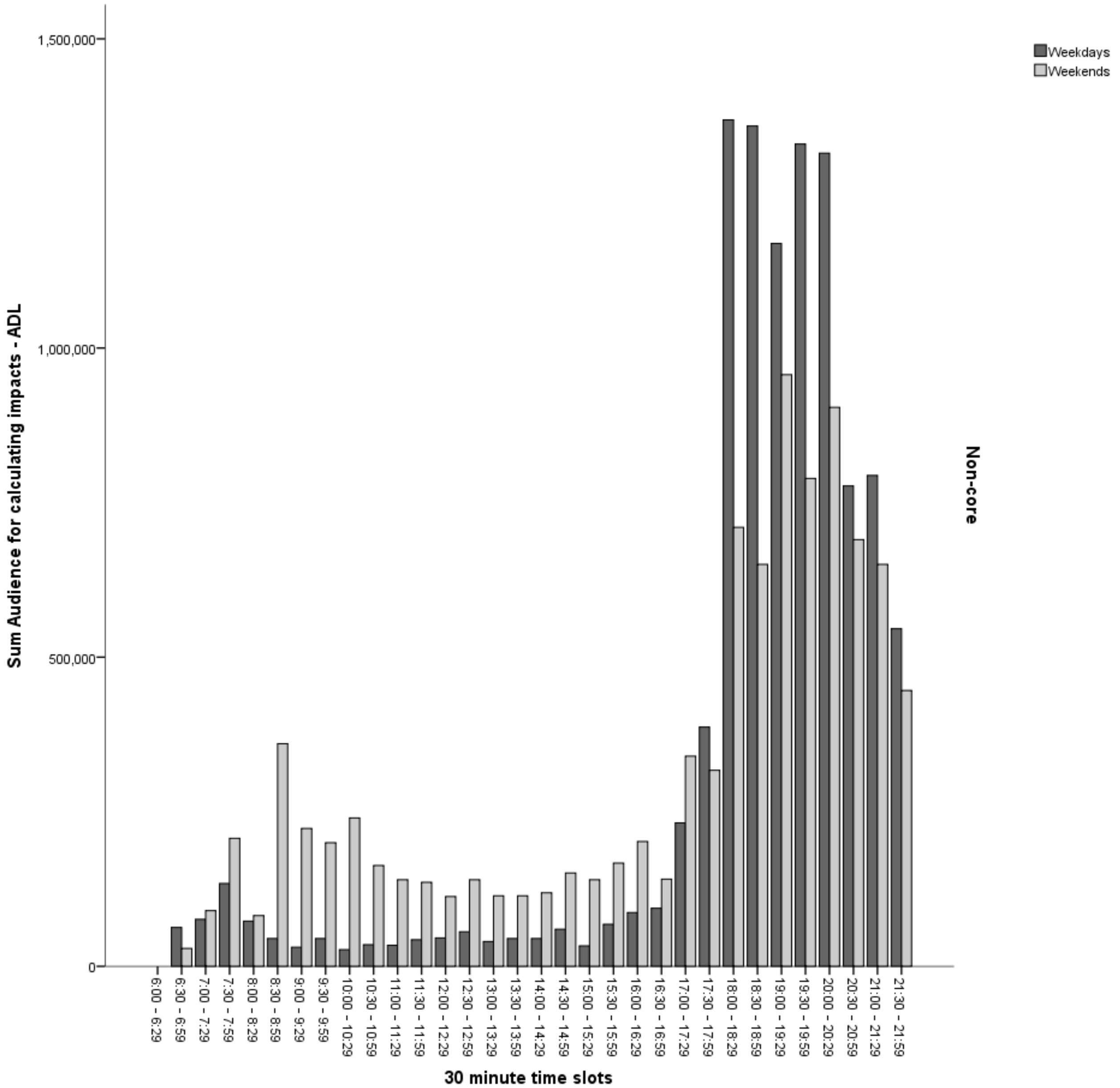

Figure 27 Non-core food impact summed over all time points (Oct 2008 to July 2010) for Adelaide free-to-air television presented by weekday versus weekend

Table 42 Total non-core food impacts (and number of non-core food ads) for each time point (Oct 2008 to July 2010) in Adelaide for free-to-air television advertising during children's peak and non-peak viewing hours with comparison of weekdays versus weekends

		Adelaide FTA													
		Oct-08		Feb-09		May-09		Oct-09		Mar-10		Jul-10		Total	
Weekdays	Not peak viewing hours	233000	(116)	296000	(188)	163000	(108)	253000	(178)	230000	(172)	237000	(159)	1412000	(921)
	Peak viewing hours	1018000	(78)	2138000	(178)	1457000	(110)	1689000	(136)	1289000	(107)	1455000	(137)	9046000	(746)
	Total	1251000	(194)	2434000	(366)	1620000	(218)	1942000	(314)	1519000	(279)	1692000	(296)	10458000	(1667)
Weekends	Not peak viewing hours	142000	(38)	404000	(131)	357000	(110)	461000	(141)	367000	(121)	508000	(156)	2239000	(697)
	Peak viewing hours	882000	(90)	1564000	(176)	1270000	(134)	1144000	(124)	1343000	(155)	1282000	(147)	7485000	(826)
	Total	1024000	(128)	1968000	(307)	1627000	(244)	1605000	(265)	1710000	(276)	1790000	(303)	9724000	(1523)
Total	Not peak viewing hours	375000	(154)	700000	(319)	520000	(218)	714000	(319)	597000	(293)	745000	(315)	3651000	(1618)
	Peak viewing hours	1900000	(168)	3702000	(354)	2727000	(244)	2833000	(260)	2632000	(262)	2737000	(284)	16531000	(1572)
	Total	2275000	(322)	4402000	(673)	3247000	(462)	3547000	(579)	3229000	(555)	3482000	(599)	20182000	(3190)

Table 43 Daily and hourly non-core food impacts by Adelaide free-to-air networks (nine, seven, ten) presented by weekend/weekday over the time points between Oct 2008 and July 2010.

		Adelaide FTA						
		Oct-08	Feb-09	May-09	Oct-09	Mar-10	Jul-10	Total
Daily Impact								
NINE	Weekdays	84000	149000	87500	213500	140000	198000	872000
	Weekends	82500	238500	74500	233000	184500	191000	1004000
SEVEN	Weekdays	97500	376500	201500	109500	183500	247000	1215500
	Weekends	149500	310500	210000	210000	253000	330500	1463500
TEN	Weekdays	444000	691500	521000	648000	436000	401000	3141500
	Weekends	280000	435000	529000	359500	417500	373500	2394500
Hourly Impact								
NINE	Weekdays	5250	9313	5469	13344	8750	12375	54500
	Weekends	5156	14906	4656	14563	11531	11938	62750
SEVEN	Weekdays	6094	23531	12594	6844	11469	15438	75969
	Weekends	9344	19406	13125	13125	15813	20656	91469
TEN	Weekdays	27750	43219	32563	40500	27250	25063	196344
	Weekends	17500	27188	33063	22469	26094	23344	149656

Table 44 Top 25 most popular programs with children aged 0-14 years for October 2008 Adelaide for free-to-air television showing the network, number of non-core advertisements and total non-core food impacts

Impact rank	Program	Network	Ratings rank	#Non-core	Impact
1	The 22nd Annual ARIA Awards	TEN	16	10	180000
2	The Simpsons	TEN	1	4	132000
3	Australian Idol	TEN	6	5	120000
4	Friends	TEN	9	5	110000
5	Neighbours	TEN	4	4	108000
6	Movie: Shark Tale	SEVEN	16	6	108000
7	Australian Idol	TEN	5	4	104000
8	NCIS	TEN	13	5	100000
9	The Simpsons	TEN	9	3	66000
10	Movie: Monster House	NINE	14	3	57000
11	Friends	TEN	14	3	57000
12	Neighbours	TEN	7	2	46000
13	The Zoo	SEVEN	19	2	32000
14	Kenny's World	TEN	2	1	30000
15	Two And A Half Men	NINE	22	2	26000
16	The Simpsons	TEN	7	1	23000
17	Home And Away	SEVEN	18	1	17000
18	Find My Family	SEVEN	19	1	16000
19	Two And A Half Men	NINE	22	1	13000
20	The Simpsons	TEN	3	0	0
21	Toon Disney(R)	SEVEN	11	0	0
22	Toon Disney	SEVEN	11	0	0
23	Today Tonight	SEVEN	21	0	0
24	20 To 1	NINE	22	0	0
25	Seven News	SEVEN	22	0	0

Table 45 Top 25 most popular programs with children aged 0-14 years for February 2009 Adelaide for free-to-air television showing the network, number of non-core advertisements and total non-core food impacts

Impact rank	Program	Network	Ratings rank	#Non-core	Impact
1	So You Think You Can Dance	TEN	9	14	252000
2	So You Think You Can Dance	TEN	6	11	242000
3	Neighbours	TEN	5	9	207000
4	Wipeout	NINE	2	7	189000
5	The Biggest Loser	TEN	1	6	186000
6	The Simpsons	TEN	3	7	182000
7	Saturday Disney	SEVEN	14	13	169000
8	The Biggest Loser	TEN	4	7	168000
9	Once Upon a Mattress	SEVEN	20	15	165000
10	Australia's Funniest Home Videos	NINE	8	7	147000
11	Desperate Housewives	SEVEN	20	11	121000
12	NCIS	TEN	12	7	105000
13	The Simpsons	TEN	13	7	98000
14	The Simpsons	TEN	17	8	96000
15	Bondi Rescue	TEN	10	5	85000
16	Neighbours	TEN	10	4	68000
17	Raise Your Voice	NINE	14	5	65000
18	Lie to Me	TEN	14	5	65000
19	The Simpsons	TEN	17	4	48000
20	Nine News	NINE	24	3	30000
21	Two and a Half Men	NINE	24	3	30000
22	Deal Or No Deal	SEVEN	17	1	12000
23	The Biggest Loser	TEN	6	0	0
24	Seven News	SEVEN	20	0	0
25	Rove	TEN	20	0	0

Table 46 Top 25 most popular programs with children aged 0-14 years for May 2009 Adelaide for free-to-air television showing the network, number of non-core advertisements and total non-core food impacts

Impact rank	Program	Network	Ratings rank	#Non-core	Impact
1	Talkin' 'Bout Your Generation	TEN	2	9	315000
2	Neighbours	TEN	7	9	234000
3	Neighbours	TEN	4	6	174000
4	The Simpsons	TEN	7	6	156000
5	Merlin	TEN	13	7	126000
6	The Simpsons	TEN	6	4	108000
7	NCIS	TEN	10	5	105000
8	Saturday Disney	SEVEN	12	5	95000
9	Recruits	TEN	5	3	84000
10	The Zoo	SEVEN	11	4	80000
11	Good News Week	TEN	20	6	78000
12	Masterchef Australia	TEN	3	2	68000
13	Movie: Return To Never Land	SEVEN	16	4	60000
14	Australia's Funniest Home Videos Show	NINE	13	3	54000
15	Sports Tonight	TEN	23	4	48000
16	Find My Family	SEVEN	17	3	42000
17	Home And Away	SEVEN	23	3	36000
18	Seven News	SEVEN	20	2	26000
19	Seven News	SEVEN	17	1	14000
20	Masterchef Australia	TEN	1	0	0
21	Masterchef Australia	TEN	9	0	0
22	HomeMADE	NINE	15	0	0
23	Postcards	NINE	20		0
24	Lie To Me	TEN	17	0	0
25	Today Tonight	SEVEN	23	0	0

Table 47 Top 25 most popular programs with children aged 0-14 years for October 2009 Adelaide for free-to-air television showing the network, number of non-core advertisements and total non-core food impacts

Impact rank	Program	Network	Ratings rank	#Non-core	Impact
1	Australian Idol	TEN	17	15	210000
2	Neighbours	TEN	1	6	180000
3	The Simpsons	TEN	4	6	120000
4	The Simpsons	TEN	12	6	96000
5	Australia's Funniest Home Videos	NINE	15	6	90000
6	The Simpsons	TEN	10	5	85000
7	20 to 1	NINE	21	7	84000
8	The Simpsons	TEN	8	4	76000
9	Bridge to Terabithia	SEVEN	3	3	72000
10	Talkin' 'Bout Your Generation	TEN	10	4	68000
11	Simpsons	TEN	12	4	64000
12	Home and Away	SEVEN	2	2	52000
13	The Simpsons	TEN	12	3	48000
14	Two and a Half Men	NINE	17	2	28000
15	RSPCA Animal Rescue	SEVEN	19	2	26000
16	Last Chance Surgery	SEVEN	19	2	26000
17	20 to 1	NINE	21	2	24000
18	The 7pm Project	TEN	21	2	24000
19	FlashForward	SEVEN	25	2	22000
20	Destroyed in Seconds	SEVEN	4	1	20000
21	Packed to the Rafters	SEVEN	4	1	20000
22	Highway Patrol	SEVEN	9	1	18000
23	Today Tonight	SEVEN	4	0	0
24	Seven News	SEVEN	15	0	0
25	Movie: Ella Enchanted	SEVEN	21	0	0

Table 48 Top 25 most popular programs with children aged 0-14 years for March 2010 Adelaide for free-to-air television showing the network, number of non-core advertisements and total non-core food impacts

Impact rank	Program	Network	Ratings rank	#Non-core	Impact
1	Movie: The Simpsons Movie	TEN	2	11	308000
2	Survivor: Heroes v. Villains	NINE	6	9	198000
3	Talkin' Bout Your Generation	TEN	8	10	190000
4	The Simpsons	TEN	1	5	145000
5	NCIS	TEN	16	10	140000
6	The Simpsons	TEN	6	6	132000
7	Top Gear	NINE	5	5	120000
8	Neighbours	TEN	3	4	108000
9	Neighbours	TEN	4	3	75000
10	Home and Away	SEVEN	14	5	75000
11	My Kitchen Rules	SEVEN	10	4	64000
12	The 7pm Project	TEN	10	4	64000
13	The Biggest Loser: Couples	TEN	17	4	52000
14	Home and Away	SEVEN	10	3	48000
15	Whizz Kids	NINE	17	2	26000
16	Bondi Rescue	TEN	17	2	26000
17	Seven News	SEVEN	23	2	24000
18	Nine News	NINE	23	1	12000
19	My Kitchen Rules	SEVEN	9	0	0
20	The Simpsons Sat	TEN	10	0	0
21	The 7pm Project	TEN	14	0	0
22	Border Security – Australia's Front Line	SEVEN	17	0	0
23	Deal or No Deal	SEVEN	17	0	0
24	Seven News	SEVEN	17	0	0
25	Two And A Half Men -Rpt	NINE	23	0	0

Table 49 Top 25 most popular programs with children aged 0-14 years for July 2010 Adelaide for free-to-air television showing the network, number of non-core advertisements and total non-core food impacts

Impact rank	Program	Network	Ratings rank	#Non-Core	Impact
1	MasterChef Australia - Finale Night	TEN	1	6	312000
2	2010 AFL – Pt Adelaide v. Adelaide	SEVEN	24	19	228000
3	Undercover Boss	TEN	3	8	224000
4	MasterChef Australia - Winner Announced	TEN	2	4	184000
5	Movie: Bee Movie	NINE	12	10	160000
6	Minute To Win It	SEVEN	8	7	133000
7	Top Gear	NINE	12	7	112000
8	Good News Week	TEN	25	9	99000
9	Home And Away	SEVEN	12	5	80000
10	Australia's Funniest Home Videos	NINE	17	5	75000
11	Movie: 101 Dalmatians	SEVEN	22	5	65000
12	The Simpsons	TEN	5	3	63000
13	The Simpsons	TEN	8	3	57000
14	Neighbours	TEN	11	3	54000
15	Packed To The Rafters	SEVEN	12	3	48000
16	Modern Family	TEN	20	3	42000
17	Neighbours	TEN	7	2	40000
18	A Current Affair	NINE	10	2	36000
19	Home And Away	SEVEN	20	2	28000
20	Modern Family	TEN	4	1	26000
21	The Simpsons	TEN	12	1	16000
22	The 7pm Project	TEN	17	1	15000
23	Nine News	NINE	22	1	13000
24	Rules Of Engagement	TEN	5	0	0
25	Seven News	SEVEN	17	0	0

Whyalla FTA

Figure 28 shows the number of non-core food impacts for each 30 minute time slot for weekdays and weekends from February 2009 to July 2010 on Whyalla FTA. Figure 29 shows the summed impacts. On weekdays, non-core food impacts were highest between 1730 and 2200. On weekends there were two peaks during which impact were high; one in the morning between 0730 and 1030, and in the evening between 1800 and 2200.

Table 50 shows the total impact of non-core food adverts during children's peak and non-peak viewing hours from February 2009 to July 2010. The non-core impacts were higher during peak viewing hours compared with non-peak viewing hours for both weekdays (1,622,000 vs 682,000) and weekends (2,834,000 vs 1,194,000). The difference in impacts between peak and non-peak viewing times is more marked on weekends.

Table 51 shows the daily average impact and hourly impact by Whyalla FTA networks on weekdays and weekends from February 2009 to July 2010. The impact of non-core food advertising is highest on channel Central on weekends, followed by channel Southern on weekends, and channel Central on weekdays.

In summary, children's exposure to non-core food advertising is measured by non-core food impacts. The impact of non-core food advertising in both Adelaide and Whyalla was highest in the late afternoon to evening on both weekdays and weekends. In Whyalla, the impact was also high in the morning on weekends. The impact was higher during children's peak viewing hours on both weekdays and weekends. The difference between peak and non-peak viewing hours was more marked on the weekend in Whyalla.

The pattern in Whyalla is similar to that seen in Adelaide FTA. However, these results should be interpreted cautiously as impacts for Whyalla were calculated using Adelaide FTA audience data.

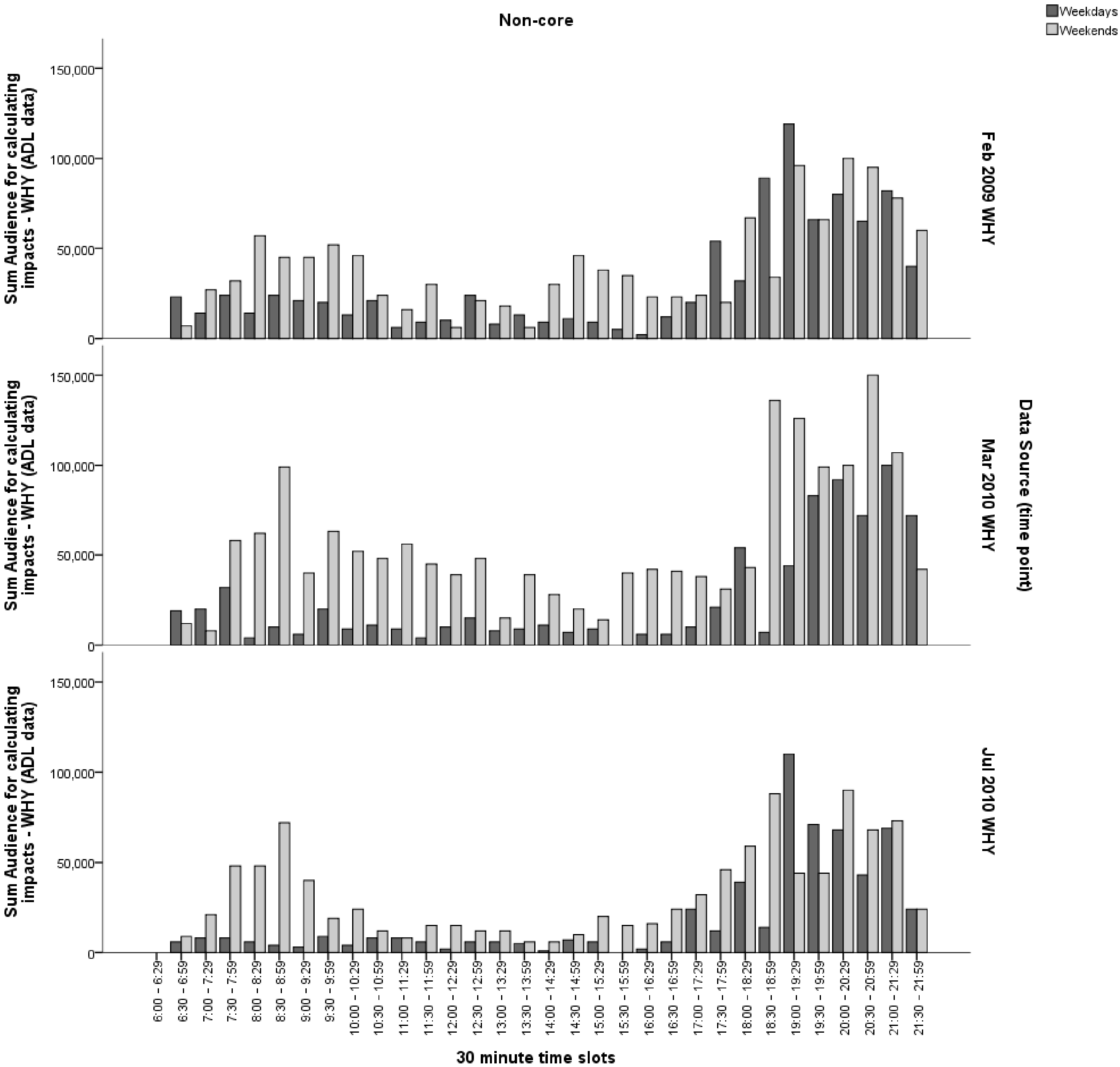

Figure 28 Non-core food impacts plotted for weekdays and weekends per half hour time slot on Whyalla free-to-air television across time points between Feb 2009 and July 2010
NB: Impacts are calculated using audience data from Adelaide FTA

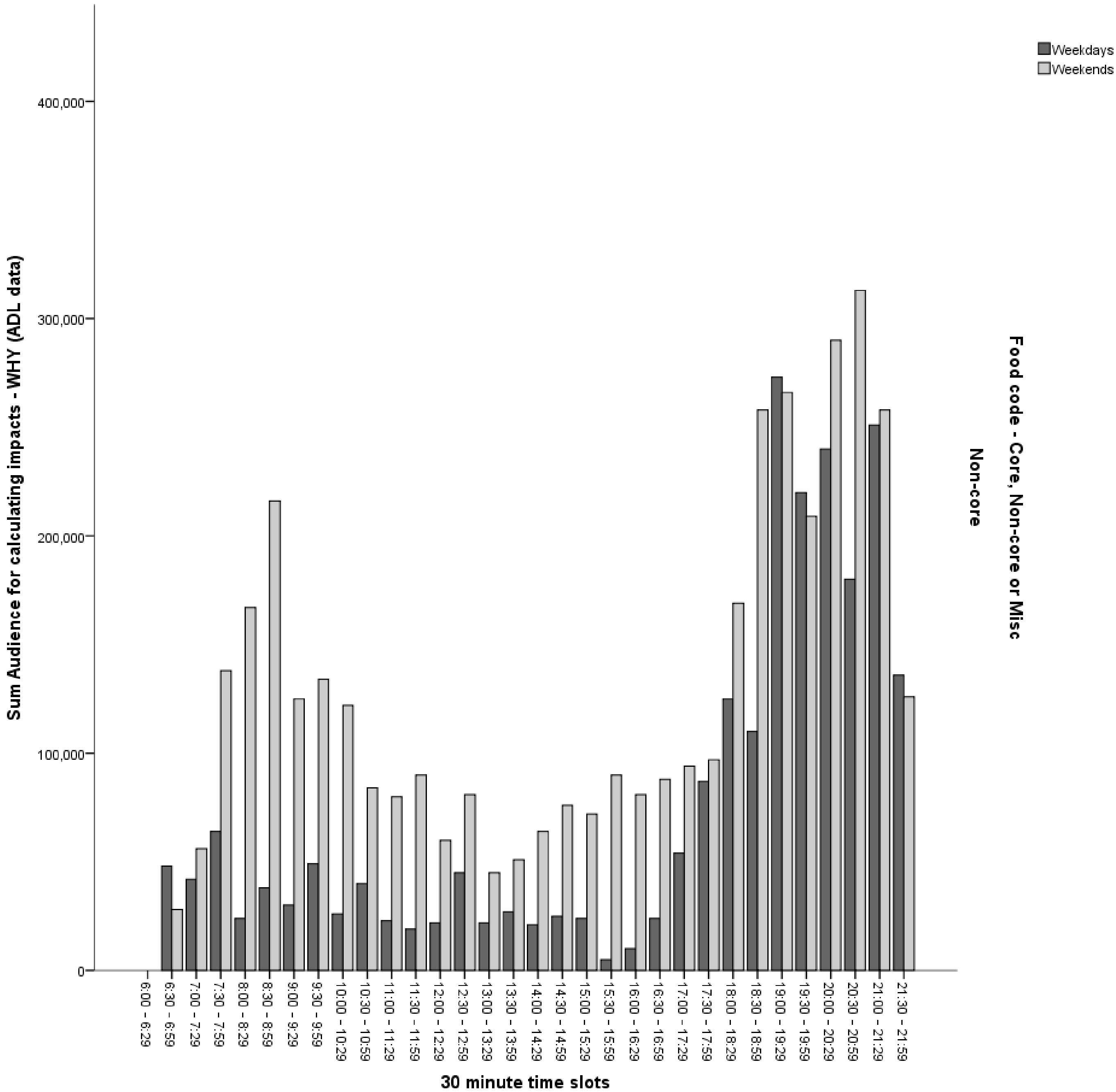

Figure 29 Non-core food impact summed over all time points (Feb 2009 to July 2010) for Whyalla free-to-air television presented by weekday versus weekend
NB: Impacts are calculated using audience data from Adelaide FTA

Table 50 Total non-core food impacts (and number of non-core food ads) for each time point (Feb 2009 to July 2010) in Whyalla for free-to-air television advertising during children's peak and non-peak viewing hours with comparison of weekdays versus weekends

		Whyalla FTA							
		Feb-09		Mar-10		Jul-10		Total	
Weekdays	Not peak viewing hours	312000	(231)	235000	(173)	135000	(102)	682000	(506)
	Peak viewing hours	627000	(75)	545000	(64)	450000	(51)	1622000	(190)
	Total	939000	(306)	780000	(237)	585000	(153)	2304000	(696)
Weekends	Not peak viewing hours	382000	(112)	543000	(160)	269000	(85)	1194000	(357)
	Peak viewing hours	885000	(110)	1198000	(144)	751000	(94)	2834000	(348)
	Total	1267000	(222)	1741000	(304)	1020000	(179)	4028000	(705)
Total	Not peak viewing hours	694000	(343)	778000	(333)	404000	(187)	1876000	(863)
	Peak viewing hours	1512000	(185)	1743000	(208)	1201000	(145)	4456000	(538)
	Total	2206000	(528)	2521000	(541)	1605000	(332)	6332000	(1401)

Table 51 Daily and hourly non-core food impacts by Whyalla free-to-air networks (Central and Southern) presented by weekend/weekday over the time points between Feb 2009 and July 2010.

		Whyalla FTA			
		Feb-09	Mar-10	Jul-10	Total
Daily Impact					
CENTRAL	Weekdays	276000	242000	159500	677500
	Weekends	384500	559000	288500	1232000
SOUTHERN	Weekdays	193500	148000	133000	474500
	Weekends	249000	311500	221500	782000
Hourly Impact					
CENTRAL	Weekdays	17250	15125	9969	42344
	Weekends	24031	34938	18031	77000
SOUTHERN	Weekdays	12094	9250	8313	29656
	Weekends	15563	19469	13844	48875

Pay TV

Figure 30 shows the number of non-core food impacts for each 30 minute time slot for weekdays and weekends for February 2009, March 2010 and July 2010, and Figure 31 the summed impacts (all three time points included), for weekdays and weekends on Pay TV.

There appears to be two peaks in the non-core food impacts, one in the morning and one in the early evening. For children aged 0-4 years, the peak non-core food impacts occurred earlier in the morning on weekdays (07:30-09:30) compared to weekends (09:00-10:30). A similar pattern was observed for children aged 5-12 years. The non-core food impacts were solid throughout the afternoon/early evening period, with a peak impact between 16:30-19:30.

Table 52 and Table 53 show the total impact of non-core food advertisements during children's peak and non-peak viewing hours, on weekdays and weekends, for the three time points. In contrast to free to air television, for Pay TV the non-core impacts were higher during non-peak viewing hours compared with peak viewing hours for both weekdays and weekends, in all children.

There was a general increasing trend in the non-core food impacts between February 21009 to July 2010, with impacts peaking in March 2010.

Table 54 and Table 55 show the hourly and daily non-core food impacts to children by Pay TV network, on weekdays and weekends. On every network the impacts were higher on the weekends. For children aged 0-4 years, the total hourly impact was highest for Fox8 followed by Nickelodeon. For children aged 5-12 years, impacts were highest on Fox8 followed by Disney.

There appears to be two peaks in the non-core food impacts on Pay TV, one in the morning and one in the early evening. For children aged 0-4 years, the peak non-core food impacts occurred earlier in the morning on weekdays (07:30-09:30) compared to weekends (09:00-10:30). A similar pattern was observed for children aged 5-12 years. The non-core food impacts were solid throughout the afternoon/early evening period, with a peak impact between 16:30-19:30.

On all networks on Pay TV the non-core food impacts were higher on weekends than weekdays. For children aged 0-4 years, the total hourly impact was highest for Fox8 followed by Nickelodeon. For children aged 5-12 years, impacts were highest on Fox8 followed by Disney.

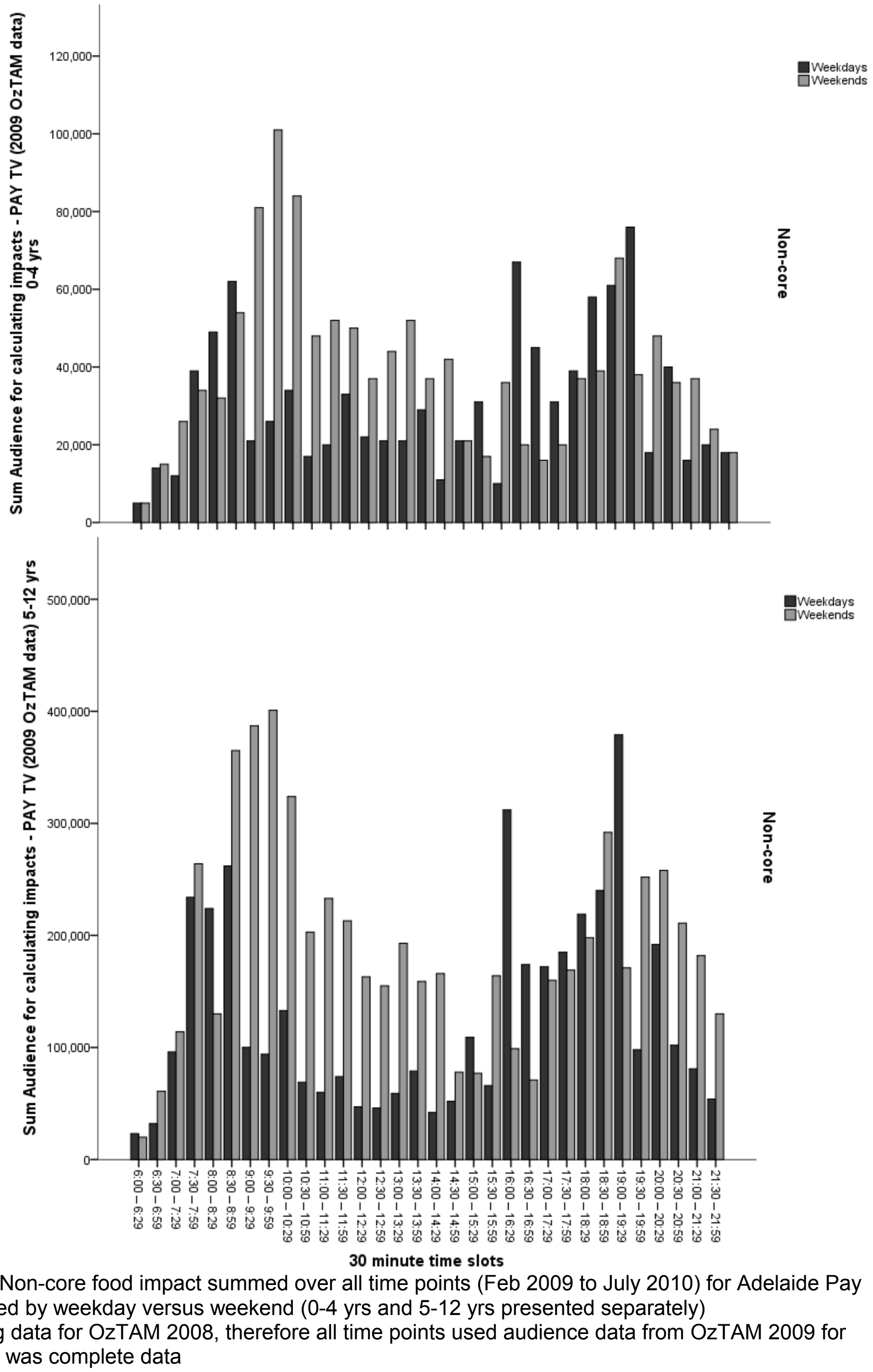

Figure 30: Non-core food impact summed over all time points (Feb 2009 to July 2010) for Adelaide Pay TV presented by weekday versus weekend (0-4 yrs and 5-12 yrs presented separately)
NB: Missing data for OzTAM 2008, therefore all time points used audience data from OzTAM 2009 for which there was complete data

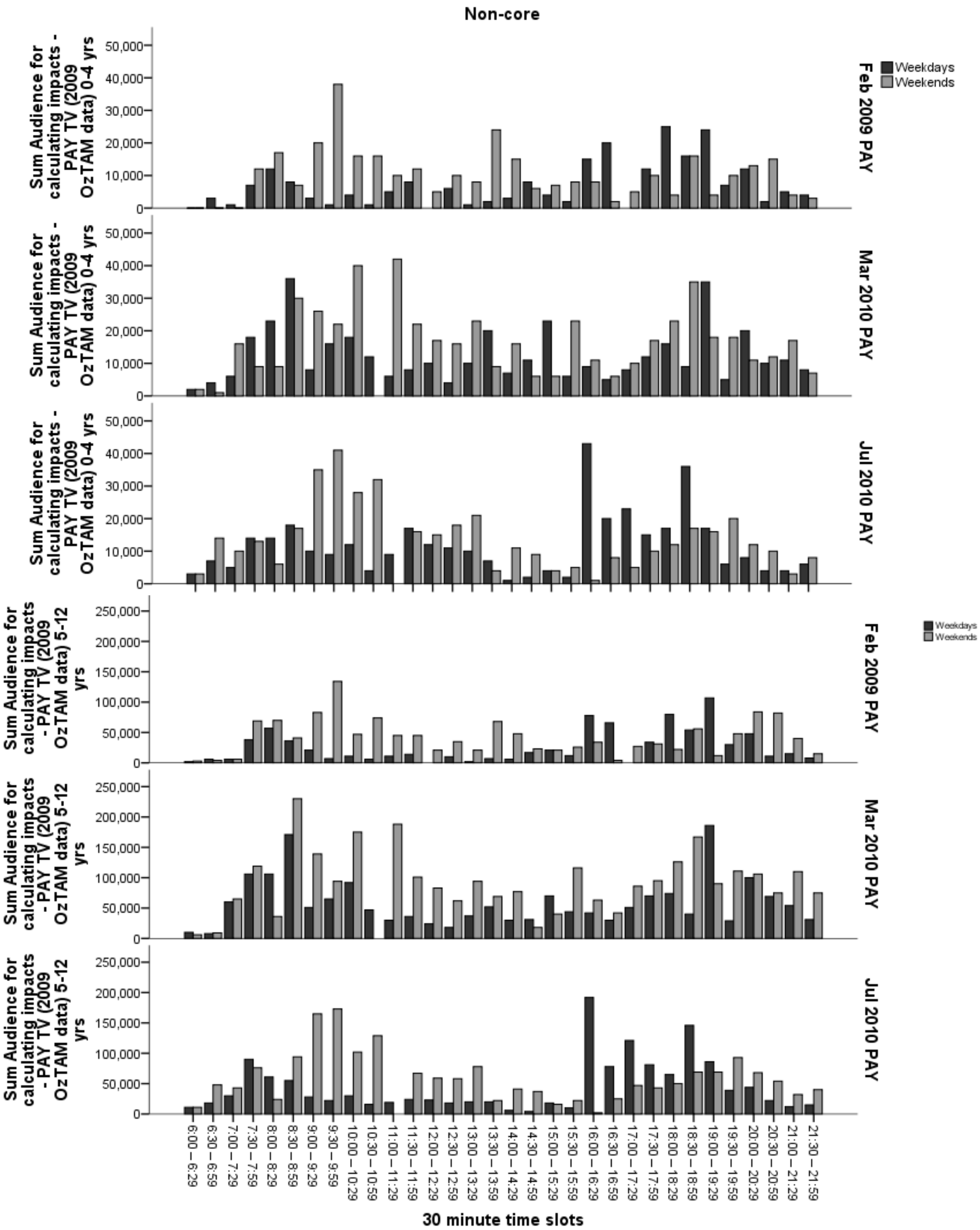

Figure 31: Non-core food impacts plotted for weekdays and weekends per half hour time slot on Adelaide Pay TV across time points between Feb 2009 and July 2010

(0-4 yrs and 5-12 yrs presented separately)

Table 52: Total non-core food impacts (and number of non-core food ads) for each time point (Feb 2009 to July 2010) in Adelaide for Pay TV advertising during children's peak and non-peak viewing hours with comparison of weekdays versus weekends (0-4 yrs)

		Pay TV – children 0-4 yrs							
		Feb 2009		*Mar 2010*		*Jul 2010*		*Total*	
Week days	Not peak viewing hours	121000	(79)	269000	(183)	213000	(128)	603000	(390)
	Peak viewing hours	100000	(29)	127000	(50)	157000	(50)	384000	(129)
	Total	221000	(108)	396000	(233)	370000	(178)	987000	(519)
Week ends	Not peak viewing hours	211000	(122)	393000	(217)	265000	(154)	869000	(493)
	Peak viewing hours	114000	(31)	127000	(38)	159000	(40)	400000	(109)
	Total	325000	(153)	520000	(255)	424000	(194)	1269000	(602)
Total	Not peak viewing hours	332000	(201)	662000	(400)	478000	(282)	1472000	(883)
	Peak viewing hours	214000	(60)	254000	(88)	316000	(90)	784000	(238)
	Total	546000	(261)	916000	(488)	794000	(372)	2256000	(1121)

Table 53: Total non-core food impacts (and number of non-core food ads) for each time point (Feb 2009 to July 2010) in Adelaide for Pay TV advertising during children's peak and non-peak viewing hours with comparison of weekdays versus weekends (5-12 yrs)

		Pay TV – children 5-12 yrs							
		Feb 2009		*Mar 2010*		*Jul 2010*		*Total*	
Week days	Not peak viewing hours	456000	(79)	1216000	(183)	727000	(128)	2399000	(390)
	Peak viewing hours	365000	(29)	648000	(50)	697000	(50)	1710000	(129)
	Total	821000	(108)	1864000	(233)	1424000	(178)	4109000	(519)
Week ends	Not peak viewing hours	890000	(122)	2193000	(217)	1170000	(154)	4253000	(493)
	Peak viewing hours	449000	(31)	674000	(38)	687000	(40)	1810000	(109)
	Total	1339000	(153)	2867000	(255)	1857000	(194)	6063000	(602)
Total	Not peak viewing hours	1346000	(201)	3409000	(400)	1897000	(282)	6652000	(883)
	Peak viewing hours	814000	(60)	1322000	(88)	1384000	(90)	3520000	(238)
	Total	2160000	(261)	4731000	(488)	3281000	(372)	10172000	(1121)

Table 54: Daily and hourly non-core food impacts by Adelaide Pay TV (Cartoon network, Disney, Fox8 and Nickelodeon) presented by weekend/weekday over the time points between Feb 2009 and July 2010 (0-4 yrs)

		Pay TV – children 0-4 yrs			
		Feb 2009	*Mar 2010*	*Jul 2010*	*Total*
Daily Impact					
CARTOON NETWORK	Weekdays	13000	19500	15500	48000
	Weekends	19000	30000	17250	66250
DISNEY	Weekdays	-	34500	500	35000
	Weekends	-	40000	4500	44500
FOX8	Weekdays	36750	36250	36750	109750
	Weekdays	41500	38500	47750	127750
NICKELODEON	Weekends	5500	8750	39750	54000
	Weekdays	20750	21500	36500	78750
Hourly Impact					
CARTOON NETWORK	Weekdays	813	1219	969	3000
	Weekends	1188	1875	1078	4141
DISNEY	Weekdays	-	2156	31	2188
	Weekends	-	2500	281	2781
FOX8	Weekdays	2297	2266	2297	6859
	Weekends	2594	2406	2984	7984
NICKELODEON	Weekdays	344	547	2484	3375
	Weekends	1297	1344	2281	4922

Note: there were no non-core advertisements for Nick Jnr

Table 55: Daily and hourly non-core food impacts by Adelaide Pay TV (Cartoon network, Disney, Fox8 and Nickelodeon) presented by weekend/weekday over the time points between Feb 2009 and July 2010 (5-12 yrs)

		Pay TV – children 5-12 yrs			
		Feb 2009	*Mar 2010*	*Jul 2010*	*Total*
Daily Impact					
CARTOON NETWORK	Weekdays	35000	39000	34750	108750
	Weekends	50250	90750	49000	190000
DISNEY	Weekdays	-	236750	3000	239750
	Weekends	-	348000	40750	388750
FOX8	Weekdays	146250	148750	147250	442250
	Weekdays	184500	173000	207750	565250
NICKELODEON	Weekends	24000	41500	171000	236500
	Weekdays	100000	105000	166750	371750
Hourly Impact					
CARTOON NETWORK	Weekdays	2188	2438	2172	6797
	Weekends	3141	5672	3063	11875
DISNEY	Weekdays	-	14797	188	14984
	Weekends	-	21750	2547	24297
FOX8	Weekdays	9141	9297	9203	27641
	Weekends	11531	10813	12984	35328
NICKELODEON	Weekdays	1500	2594	10688	14781
	Weekends	6250	6563	10422	23234

Note: there were no non-core advertisements for Nick Jnr

What is the affiliation of the food companies that are advertising – e.g. fast food restaurant, retailer, manufacturer, signatory to AFGC initiative, signatory to AANA QSR Initiative, other?

Companies were coded according to the following descriptions
Retailer – primary function is the sale of food and beverage products to consumers, e.g. Coles, Local grocers.
Manufacturer – primary function is the production of the advertised food or beverage products, e.g. Tip Top Bread.
Food Service – primary function is the manufacture and delivery of ready-to-eat foods, e.g. local restaurants.
Government – Food Advertisements sponsored by a government body (local or federal)

Across all data sets, there were advertisements from 173 unique companies.

Adelaide FTA

Between October 2008 and July 2010, the rate (ads/hr) of total food advertising was 1.52 to 2.16 for Food Service companies, 0.95 to 3.45 for Food Manufacturers, and 0.28 to 0.49 for Food Retailers. Food Service and Food Manufacturers had the greatest number of ads for non-core foods[3], 260 to 387 and 30 to 319 respectively. Food Service companies had fewer ads for core foods (0 to 52) compared with Food Manufacturers (38 to 255). Food Retailers advertised mostly miscellaneous products (Table 56).

Government advertising reflected a very small portion of total food advertising and all ads were for core-foods.

Of the top 20 companies advertising on Adelaide FTA (Table 57), 12 are signatories and 8 are non-signatories. Non-core food advertising makes up more than 2/3 of food advertising for 13 companies, including 11 signatories. Non-core food advertising makes up less than 1/3 of food advertising for 5 companies, none of which are signatories.

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[3] At the food type level of coding all fast food advertisements were coded as non-core foods and all supermarket advertisements were coded as miscellaneous. Then, at the food sub code level, these advertisements are coded as advertising healthy, core or non-specified items. Food sub code data is presented on pages 28 to 38.

Table 56: Number of advertisements (and frequency per hour) broadcast by companies of different description (retailer, manufacturer, service provider and government) over time and for each food category (core, non-core, miscellaneous and total) in Adelaide for free-to-air television across time points between Oct 2008 and July 2010

		Adelaide FTA											
		Oct-08		Feb-09		May-09		Oct-09		Mar-10		Jul-10	
Food Retailer	Core	18	(0.09)	0	(-)	3	(0.02)	9	(0.05)	0	(-)	0	(-)
	Non-core	0	(-)	9	(0.05)	14	(0.07)	0	(-)	22	(0.11)	12	(0.06)
	Miscellaneous	63	(0.33)	84	(0.44)	92	(0.48)	95	(0.49)	32	(0.17)	79	(0.41)
	Total	81	(0.42)	93	(0.48)	109	(0.57)	104	(0.54)	54	(0.28)	91	(0.47)
Food Manufacturer	Core	38	(0.20)	123	(0.64)	43	(0.22)	255	(1.33)	208	(1.08)	179	(0.93)
	Non-core	30	(0.16)	277	(1.44)	96	(0.50)	319	(1.66)	267	(1.39)	310	(1.61)
	Miscellaneous	121	(0.63)	101	(0.53)	44	(0.23)	89	(0.46)	109	(0.57)	76	(0.40)
	Total	189	(0.98)	501	(2.61)	183	(0.95)	663	(3.45)	584	(3.04)	565	(2.94)
Food Service	Core	0	(-)	28	(0.15)	0	(-)	3	(0.02)	42	(0.22)	52	(0.27)
	Non-core	292	(1.52)	387	(2.02)	352	(1. 83)	260	(1.35)	260	(1.35)	277	(1.44)
	Miscellaneous	0	(-)	0	(-)	0	(-)	0	(-)	0	(-)	1	(0.01)
	Total	292	(1.52)	415	(2.16)	352	(1.83)	263	(1.37)	302	(1.57)	330	(1.72)
Government*	Core	0	(-)	19	(0.10)	0	(-)	10	(0.05)	0	(-)	0	(-)
	Total	0	(-)	19	(0.10)	0	(-)	10	(0.05)	0	(-)	0	(-)

*No non-core or miscellaneous advertising for government
^Divided by 192 for all days and channels
†Data collected by AC Nielsen – fewer-food ads

Table 57: Top 20 companies (based in the number of food advertisements) showing company type signatory status, number of food advertisements, the proportion of non-core food advertising and the frequency of food advertising per hour for Adelaide free-to-air television (time points pooled

Rank	Company	Company Type	Signatory†	n	%Non-core§	freq\h^
1	McDonalds	Food service	Y	422	100.0	0.37
2	Doctors Associates Inc	Food service	N	275	100.0	0.24
3	Hungry Jacks	Food service	Y	274	100.0	0.24
4	Yum! Brands*	Food service	Y	243	100.0	0.21
5	Woolworths	Food retailer	N	180	0.0	0.16
6	Dominos Pizza	Food service	N	165	100.0	0.14
7	Wyeth Consumer Healthcare	Food manufacturer	N	160	22.5	0.14
8	Unilever	Food manufacturer	Y	146	74.0	0.13
9	The Good Food Company	Food service	N	142	4.2	0.12
10	Nestle Australia	Food manufacturer	Y	129	38.0	0.11
11	Mars Incorporated	Food manufacturer	Y	126	81.7	0.11
12	Cereal Partners Worldwide	Food manufacturer	Y	104	72.1	0.09
13	McCain's Foods	Food manufacturer	N	97	35.1	0.08
14	Australian Fast Foods Pty Ltd	Food service	Y	96	100.0	0.08
15	Coca-cola Amatil	Food manufacturer	Y	94	85.1	0.08
16	Kellogg's	Food manufacturer	Y	91	67.0	0.08
17	Ferrero	Food manufacturer	Y	84	96.4	0.07
18	Cadbury Plc	Food manufacturer	Y	83	100.0	0.07
19	Wakefern Food Corporation	Food retailer	N	79	2.5	0.07
20	Heinz	Food manufacturer	N	78	20.5	0.07

*Yum! Brands represents Pizza Hut and KFC
^Divided by all hours of advertising across all time periods (1152 hours)
†Signatory to either the AFGC initiative or the QSRI one

§The food coding system automatically codes all fast food manufacturers as non-core

Whyalla FTA

Between February 2009 and July 2010 the rate (ads/hr) of total food advertising was 0.39 to 0.78 for Food Service companies, 0.73 to 1.47 for Food Manufacturers, and 0 to 0.01 for Food Retailers. Food Manufacturers had the greatest number of ads for non-core foods at between (131 and 283) but also advertised core food (69 to 214 ads). Food Service companies advertised only non-core foods (71 to 249 ads). Food Retailers advertised non-core and miscellaneous products (Table 58).

Of the top 20 companies on Whyalla FTA, 9 are signatories and 11 are non-signatories (Table 59). Non-core food advertising makes up more than 2/3 of food advertising for 13 companies, including 9 signatories. Non-core food advertising makes up less than 1/3 (all ‘0’) of food advertising for 6 companies, none of which are signatories.

Table 58: Number of advertisements (and frequency per hour) broadcast by companies of different description (retailer, manufacturer, service provider and government) over time and for each food category (core, non-core, miscellaneous and total) in Whyalla for free-to-air television across time points between Feb 2009 and July 2010

		Whyalla FTA*					
		Feb-09		Mar-10		Jul-10	
Food Retailer	Core	0	(-)	5	(0.04)	3	(0.02)
	Non-core	0	(-)	0	(-)	3	(0.02)
	Miscellaneous	56	(0.44)	38	(0.30)	91	(0.71)
	Total	56	(0.44)	43	(0.34)	97	(0.76)
Food Manufacturer	Core	6	(0.05)	74	(0.58)	22	(0.17)
	Non-core	336	(2.63)	311	(2.43)	120	(0.94)
	Miscellaneous	1	(0.01)	119	(0.93)	17	(0.13)
	Total	343	(2.68)	504	(3.94)	159	(1.24)
Food Service^	Core	0	(-)	0	(-)	64	(0.50)
	Non-core	192	(1.50)	230	(1.80)	209	(1.63)
	Total	192	(1.50)	230	(1.80)	273	(2.13)

*No government
^No Miscellaneous advertisements
^Divided by 128 for all days and channels

Table 59: Top 20 companies (based in the number of food advertisements) showing company type signatory status, number of food advertisements, the proportion of non-core food advertising and the frequency of food advertising per hour for Whyalla free-to-air television (time points pooled

Rank	Company	Company Type	Signatory†	n	%Non-core	freq\h^
1	Kellogg's	Food manufacturer	Y	308	91.6	0.80
2	McDonalds	Food service	Y	227	100.0	0.59
3	Mars Incorporated	Food manufacturer	Y	124	100.0	0.32
4	Bakers Delight Bakery	Food service	N	108	40.7	0.28
5	Doctors Associates Inc	Food service	N	105	100.0	0.27
6	Unilever	Food manufacturer	Y	97	100.0	0.25
7	PepsiCo	Food manufacturer	Y	93	100.0	0.24
8	Tony Ferguson	Food manufacturer	N	93	0.0	0.24
9	Hungry Jacks	Food service	Y	91	100.0	0.24
10	Woolworths	Food retailer	N	86	0.0	0.22
11	Yum! Brands*	Food service	Y	79	100.0	0.21
12	Cerebos (Australia) Ltd	Food manufacturer	N	54	100.0	0.14
13	Yakult	Food manufacturer	N	53	0.0	0.14
14	Barnacle Bill	Food service	N	43	100.0	0.11
15	Wesfarmers	Food manufacturer	N	42	0.0	0.11
16	Ethical Nutrients	Food manufacturer	N	38	0.0	0.10
17	Cadbury Plc	Food manufacturer	Y	32	100.0	0.08
18	Eagle Boys Pizza	Food service	N	30	100.0	0.08
19	IGA Supermarkets	Food retailer	N	30	0.0	0.08
20	Coca-cola Amatil	Food manufacturer	Y	28	100.0	0.07

*Yum! Brands represents Pizza Hut and KFC
^Divided by all hours of advertising across all time periods (384 hours)
†Signatory to either the AFGC initiative or the QSRI one

Pay TV

Between February 2009 and July 2010 the rate (ads/hr) of total food advertising was 1.50 to 2.13 for Food Service companies, 1.24 to 3.94 for Food Manufacturers, and 0.34 to 0.76 for Food Retailers. Food Service and Food Manufacturers had the greatest number of ads for non-core foods, 192 to 230 and 120 to 336 respectively. Compared to Adelaide and Whyalla FTA, Food Manufacturers advertised fewer core foods (6 to 74). Food Service companies advertised only non-core foods. Food Retailers advertised mostly miscellaneous products (Table 60).

Table 60: Number of advertisements (and frequency per hour) broadcast by companies of different description (retailer, manufacturer, service provider) over time and for each food category (core, non-core, miscellaneous and total) in Adelaide for Pay TV across time points between Feb 2009 and July 2010

		Pay TV*					
		Feb-09		Mar-10		Jul-10	
Food Retailer†	Non-core	4	(0.01)	0	(-)	18	(0.06)
	Miscellaneous	0	(-)	0	(-)	5	(0.02)
	Total	4	(0.01)	0	(-)	23	(0.07)
Food Manufacturer	Core	71	(0.22)	214	(0.67)	69	(0.22)
	Non-core	131	(0.41)	239	(0.75)	283	(0.88)
	Miscellaneous	33	(0.10)	18	(0.06)	24	(0.08)
	Total	235	(0.73)	471	(1.47)	376	(1.18)
Food Service^	Non-core	126	(0.39)	249	(0.78)	71	(0.22)
	Total	126	(0.39)	249	(0.78)	71	(0.22)

*No government
^No Miscellaneous advertisements
†No core advertisements
^Divided by 320 for all days and channels

Of the top 20 companies on Pay TV (Table 61), 12 are signatories and 8 are non-signatories. Non-core food advertising makes up more than 2/3 of food advertising for 14 companies, including 10 signatories. Non-core food advertising makes up less than 1/3 of food advertising for 4 companies, including 1 signatory (Sanitarium).

Table 61: Top 20 companies (based in the number of food advertisements) showing company type signatory status, number of food advertisements, the proportion of non-core food advertising and the frequency of food advertising per hour for Adelaide Pay TV (time points pooled)

Rank	Company	Company Type	Signatory†	n	%Non-core	freq\h^
1	McDonalds	Food service	Y	337	100.0	0.35
2	Sanitarium	Food manufacturer	Y	142	0.0	0.15
3	Cereal Partners Worldwide	Food manufacturer	Y	109	68.8	0.11
4	Campbell Arnott's	Food manufacturer	Y	99	76.8	0.10
5	Nestle Australia	Food manufacturer	Y	88	94.3	0.09
6	Hungry Jacks	Food service	Y	87	100.0	0.09
7	Kellogg's	Food manufacturer	Y	62	41.9	0.06
8	Cadbury Plc	Food manufacturer	Y	48	100.0	0.05
9	Goodman Fielder Group	Food manufacturer	N	43	0.0	0.04
10	Meadow Lea Foods	Food manufacturer	N	42	100.0	0.04
11	Kraft	Food manufacturer	Y	33	100.0	0.03
12	Ferrero	Food manufacturer	Y	32	100.0	0.03
13	Cantarella Bros	Food manufacturer	N	30	100.0	0.03
14	Coca-cola Amatil	Food manufacturer	Y	29	65.5	0.03
15	PepsiCo	Food manufacturer	Y	27	100.0	0.03
16	Frucor Beverages	Food manufacturer	N	24	100.0	0.03
17	Wyeth Consumer Healthcare	Food manufacturer	N	24	0.0	0.03
18	McCains Foods	Food manufacturer	N	23	34.8	0.02
19	Bayer Australia	Food manufacturer	N	16	0.0	0.02
20	Doctors Associates Inc	Food service	N	16	100.0	0.02

^Divided by all hours of advertising across all time periods (960 hours)
†Signatory to either the AFGC initiative or the QSRI one

In summary, Food Service and Food Manufacturers advertise the most overall and the most non-core foods. Food Manufacturers also advertise core foods but Food Service companies advertise mostly (often exclusively) non-core foods. More than half of the 20 top companies advertise more than 2/3 non-core foods and most of these companies are signatories to self-regulatory initiatives.

The food coding system used may have influenced the results regarding the amount of non-core food advertising. All fast foods are classified as non-core and all supermarket advertisements as miscellaneous. It is only when analysing at the sub-code level that it is clear how many fast food and supermarket advertisements predominantly show non-core foods.

IN RELATION TO SIGNATORIES TO THE AFCG INIATIVE AND THE AANA QSRI INIATIVE

In all cases the total number of advertisements in reference to the AFGC initiative is limited to only food advertisers and excludes fast food advertisers (as they are signed to the QSRI initiative). Likewise, discussion of the QSRI initiative refers only to fast food advertisements at each time point.

a) What is the pattern of food advertising?

The rate of food advertising was calculated to represent the number of advertisements seen per hour by food category and signatory status (signatories/non-signatories). The advertising patterns of signatories were compared with non-signatories since the introduction of self-regulatory initiatives; 1 January 2009 for the AFGC (corresponding to the February 2009 time point in the current data) and 1 August 2009 for the QSRI (corresponding to the October 2009 time point in the current data set.

As some companies joined the AFCG initiative after its initial release, the number of companies who are classified as signatories varies from time point to time point. At the February 2009 time point, ten companies had signed the initiative whereas by the July 2010 time point, 18 companies were classified as signatories. As the initiative took effect from 1 January 2009, the October 2008 data collection point was prior to the commencement of the initiative. Food advertising by signatories in July 2010 represented 40% of the total food advertising for this period (excluding fast food advertisements).

In regards to the QSRI initiative, five companies signed the agreement that was announced on 25 June 2009, taking effect from August 2009 and no additional companies have signed since this time. Therefore all data collection time points prior to October 2009 were prior to commencement of the initiative. Advertising by the QSRI signatories represented 70% of all fast food advertisements in July 2010.

<u>Adelaide FTA</u>

Table 62 shows the rate of food advertisements by signatories and non-signatories for Adelaide FTA. Overall the rate of advertising was lower for signatories than non-signatories which was, in part, expected considering that this group accounts for a slightly lower proportion of all food advertising.

Since February 2009 the rate of non-core food advertising by AFGC signatories was higher at some time points and lower at other time points compared to non-signatories, with no clear pattern evident. The rate of advertising of core food and miscellaneous products was generally lower by signatories.

Overall the rate of advertising was higher for QSRI signatories than non-signatories. Again, this is expected given the fact that these companies account for a higher proportion of the advertising.

Since October 2009 the rate of non-core food advertising was higher by QSRI signatories than non-signatories. Again, this needs to be interpreted cautiously as 70% of all fast food advertisements were broadcast by signatories and it is likely that this increases the rate. The rate of advertising depicting healthy alternatives was slightly lower by signatories, but overall rates were low for both. The rate of non-specific food adverts was lower for signatories.

The rate of advertising of core foods was generally lower by AFGC signatories. There was no clear pattern over the six monitoring points in the rate of non-core food advertising by AFGC signatories.

Since October 2009 the rate of non-core food advertising was higher by QSRI signatories compared to non-signatories.

Overall, caution needs to be used when interpreting these figures as the signatories account for varying proportions of total advertising for foods and fast foods than the non-signatories.

Table 62 Frequency (rate) of food advertisements per hour^ by food category (core, non-core, miscellaneous and total) and by company type (signatory company versus non- signatory company) for Adelaide *free-to-air television over time points between Oct 2008 and July 2010

			Adelaide FTA					
			Oct-08†	Feb-09	May-09†	Oct-09	Mar-10	Jul-10
AFGC	Non-signatories	Core	0.29	0.77	0.11	1.08	0.74	0.94
		Non-core	0.17	0.87	0.49	0.50	0.65	0.52
		Misc	0.96	0.92	0.60	0.78	0.68	0.76
		Total	1.42	2.56	1.21	2.36	2.06	2.21
	Signatories*	Core	-	0.12	0.13	0.36	0.56	0.27
		Non-core	-	0.66	0.13	1.18	0.96	1.17
		Misc	-	0.04	0.10	0.18	0.06	0.06
		Total	-	0.82	0.36	1.71	1.58	1.49
QSRI	Non-signatories	Non-core	1.04	1.07	1.41	0.21	0.14	0.40
		Healthy alt	0.17	0.20	0.04	0.05	0.20	0.00
		Non-specific	0.30	0.70	0.34	0.21	0.07	0.03
		Total	1.51	1.98	1.78	0.48	0.41	0.43
	Signatories	Non-core	-	-	-	0.67	0.72	0.95
		Healthy alt	-	-	-	0.01	0.13	0.00
		Non-specific	-	-	-	0.18	0.03	0.05
		Total				0.86	0.88	1.00

^Divided by 192 for all days and channels

†Data collected by AC Nielsen – fewer-food ads

*Where data is indicated by “-“ the initiatives were not in effect

Whyalla FTA

Table 63 shows the frequency of food advertisements for signatories and non-signatories for Whyalla FTA. Since Feb 2009 AFGC signatories advertised non-core products at a higher rate at two time points and at a lower rate at one time point. Signatories advertised core products at a lower rate. Miscellaneous products were advertised only by non-signatories.

Since March 2009 QSRI signatories advertised both non-core foods and healthy alternatives at a higher rate. Non-specific advertisements were shown at a low rate by both company types.

In Whyalla, since Feb 09, AFGC signatories advertised core products at a lower rate than non-signatories. Since Mar 2009, QSRI signatories advertised both non-core foods and healthy alternatives at a higher rate than non-signatories.

Again, caution needs to be used when interpreting these figures as the signatories account for varying proportions of total advertising for foods and fast foods than the non-signatories.

Table 63 Frequency (rate) of food advertisements per hour by food category (core, non-core, miscellaneous and total) and by company type (signatory company versus non- signatory company) for Whyalla free-to-air television over time points between Feb 2009 and July 2010

			Whyalla		
			Feb-09	Mar-10	Jul-10
AFGC	Non-signatories	Core	0.05	0.59	0.57
		Non-core	1.48	0.81	0.04
		Misc	0.45	1.23	0.84
		Total	1.98	2.63	1.45
	Signatories	Core	0.00	0.03	0.13
		Non-core	1.14	1.97	0.92
		Misc	0.00	0.00	0.00
		Total	1.14	2.00	1.05
QSRI	Non-signatories	Non-core	0.68	0.13	0.40
		Healthy alt	0.10	0.03	0.00
		Non-specific	0.72	0.01	0.07
		Total	1.50	0.16	0.47
	Signatories	Non-core	-	0.95	0.92
		Healthy alt	-	0.28	0.19
		Non-specific	-	0.05	0.05
		Total		1.28	1.16

^Divided by 128 for all days and channels

Pay TV

Table 64 shows the frequency of food advertisements for signatories and non-signatories for Pay TV. From February 2009 AFGC signatories advertised non-core foods at a higher rate than non-signatories. The advertising rate for core products showed no consistent pattern. Miscellaneous products were advertised predominantly by non-signatories.

From March 2010 QSRI signatories advertised non-core foods at a higher rate than non-signatories. Healthy alternatives were also advertised at a higher rate (based on one time point) by signatories. Non-specific food advertisements were shown at a higher rate by signatories.

On Pay TV, from February 2009, AFGC signatories advertised non-core foods at a higher rate than non-signatories. From March 2010 QSRI signatories advertised non-core foods and healthy alternatives at a higher rate than non-signatories.

Again, caution needs to be used when interpreting these figures as the signatories account for varying proportions of total advertising for foods and fast foods than the non-signatories.

Table 64 Frequency (rate) of food advertisements per hour by food category (core, non-core, miscellaneous and total) and by company type (signatory company versus non- signatory company) for Adelaide Pay TV over time points between Feb 2009 and July 2010

			Pay TV		
			Feb-09	Mar-10	Jul-10
AFCG	Non-signatories	Core	0.20	0.19	0.11
		Non-core	0.15	0.32	0.21
		Misc	0.10	0.06	0.09
		Total	0.44	0.57	0.41
	Signatories	Core	0.03	0.48	0.10
		Non-core	0.27	0.43	0.68
		Misc	0.01	0.00	0.00
		Total	0.30	0.91	0.78
QSRI	Non-signatories	Non-core	0.13	0.01	0.00
		Healthy alt	0.18	0.03	0.00
		Non-specific	0.09	0.02	0.03
		Total	0.39	0.05	0.03
	Signatories	Non-core	-	0.36	0.07
		Healthy alt	-	0.03	0.16
		Non-specific	-	0.34	0.02
		Total	-	0.73	0.24

^Divided by 320 for all days and channels

b) What proportion of food advertisements are for core and non-core food products?

Adelaide FTA

Since February 2009, considering the six time points, 36.2-80.3% of the food advertisements by AFGC signatories were for non-core foods, 14.6-35.6% for core foods and 3.6-29.0% for miscellaneous foods. Advertising by non-signatories comprised 21.1-48% non-core foods, 9.4-45.8% core foods and 32.8-49.8% miscellaneous foods (Table 65).

Since March 2010, considering two time points, 78.2-95.3% of the food advertisements by QSRI signatories were for non-core foods, 0–14.2% for healthy alternatives, and 3.6–21.2% for 'non-specific' foods. Advertising by non-signatories comprised 33.3-92.8% non-core foods, 0-50.0% healthy alternatives, and 7.2-44.6% non-specific food adverts.

Whyalla FTA

Since February 2009, advertising by AFGC signatories comprised 88.1-100% non-core foods and 0-11.9% core-foods. Advertising by non-signatories comprised 2.7-75.0% non-core foods and 2.4-39.2% core foods (Table 66).

Since March 2010 advertising by QSRI signatories comprised 73.8-79.2% non-core foods, 16.1-22.0% core foods, and 4.3-4.7% non specific food. Advertising by non-signatories comprised 76.2-85.0% core foods, 0-19.0% healthy alternatives, and 4.8-15.0% non-specific advertisements.

Pay TV

Since February 2009, advertising for AFGC signatories comprised 46.9-89.7% non-core foods, 8.2-53.7% core foods, and 0-2.1% miscellaneous foods. Advertising by non-signatories comprised 33.8-56.9% non-core foods, 27.3-44.4% core foods, and 9.9-22% miscellaneous (Table 67).

From March 2010, advertising by QSRI signatories comprised 26.9-50.0% non-core foods, 3.4-66.7% healthy alternatives, and 6.4-46.6% non specific "brand". Advertising by non-signatories comprised 9.1-11.8% non-core foods, 0-47.1% healthy alternatives, and 41.2-90.9% non-specific food adverts.

For AFGC signatories, the proportion of non-core food advertisements was typically greater than 60% (with two exceptions) and was higher than non-signatories. The proportion of core foods advertised was typically higher in non-signatories, with some exceptions.

In terms of the QSRI, the proportion of advertising for non-core foods was between 73.8-95.3% for Adelaide and Whyalla, and 26.9-50.0% for Pay TV. In comparison, advertising for healthy alternatives by signatories comprised 0-22.0% in Adelaide and Whyalla, and 0-47.1% on Pay TV.

Table 65 Total number (n) and proportion (%) of food advertisements by food category (core, non-core, miscellaneous and total) and by company type (signatory company versus non- signatory company) for Adelaide free-to-air television over time points between Oct 2008 and July 2010

			Oct-08†		Feb-09		May-09†		Oct-09		Mar-10		Jul-10	
			n	%	n	%	n	%	n	%	n	%	n	%
AFCG	Non-signatories	Core	56	20.6	147	29.9	22	9.4	208	45.8	142	35.9	180	42.4
		Non-core	32	11.8	167	34.0	95	40.8	96	21.1	124	31.3	100	23.5
		Misc	184	67.6	177	36.0	116	49.8	150	33.0	130	32.8	145	34.1
		Total	272	100.0	491	100.0	233	100.0	454	100.0	396	100.0	425	100.0
	Signatories	Core	-	-	23	14.6	24	34.8	69	21.0	108	35.6	51	17.8
		Non-core	-	-	126	80.3	25	36.2	226	68.7	184	60.7	224	78.3
		Misc	-	-	8	5.1	20	29.0	34	10.3	11	3.6	11	3.8
		Total	-	-	157	100.0	69	100.0	329	100.0	303	100.0	286	100.0
QSRI	Non-signatories	Non-core	199	68.6	206	54.2	270	78.9	41	44.6	26	33.3	77	92.8
		Healthy alt	33	11.4	39	10.3	7	2.0	10	10.9	39	50.0	0	.0
		Non-specific	58	20.0	135	35.5	65	19.0	41	44.6	13	16.7	6	7.2
		Total	290	100	380	100	342	100	92	100	78	100	83	100
	Signatories	Non-core	-	-	-	-	-	-	129	78.2	139	82.2	183	95.3
		Healthy alt	-	-	-	-	-	-	1	.6	24	14.2	0	.0
		Non-specific	-	-	-	-	-	-	35	21.2	6	3.6	9	4.7
		Total	-	-	-	-	-	-	165	100	169	100	192	100

†Data collected by AC Nielsen – fewer-food ads

Table 66 Total number (n) and proportion (%) of food advertisements by food category (core, non-core, miscellaneous and total) and by company type (signatory company versus non- signatory company) for Whyalla free-to-air television over time points between Feb 2009 and July 2010

			Whyalla					
			Feb-09		Mar-10		Jul-10	
			n	%	n	%	n	%
AFGC	Non-signatories	Core	6	2.4	75	22.3	73	39.2
		Non-core	190	75.1	104	31.0	5	2.7
		Misc	57	22.5	157	46.7	108	58.1
		Total	253	100.0	336	100.0	186	100.0
	Signatories	Core	0	.0	4	1.6	16	11.9
		Non-core	146	100.0	252	98.4	118	88.1
		Misc	0	.0	0	.0	0	.0
		Total	146	100.0	256	100.0	134	100.0
QSRI	Non-signatories	Non-core	87	45.3	16	76.2	51	85.0
		Healthy alt	13	6.8	4	19.0	0	.0
		Non-specific	92	47.9	1	4.8	9	15.0
		Total	192	100	21	100	60	100
	Signatories	Non-core	-	-	121	73.8	118	79.2
		Healthy alt	-	-	36	22.0	24	16.1
		Non-specific	-	-	7	4.3	7	4.7
		Total			164	100	149	100

Table 67 Total number (n) and proportion (%) of food advertisements by food category (core, non-core, miscellaneous and total) and by company type (signatory company versus non- signatory company) for Adelaide Pay TV over time points between Feb 2009 and July 2010

			Pay TV					
			Feb-09		Mar-10		Jul-10	
			n	%	n	%	n	%
AFGC	Non-signatories	Core	63	44.4	60	33.1	36	27.3
		Non-core	48	33.8	103	56.9	67	50.8
		Misc	31	21.8	18	9.9	29	22.0
		Total	142	100.0	181	100.0	132	100.0
	Signatories	Core	8	8.2	154	53.1	33	13.3
		Non-core	87	89.7	136	46.9	216	86.7
		Misc	2	2.1	0	.0	0	.0
		Total	97	100.0	290	100.0	249	100.0
QSRI	Non-signatories	Non-core	42	33.3	2	11.8	1	9.1
		Healthy alt	56	44.4	8	47.1	0	.0
		Non-specific	28	22.2	7	41.2	10	90.9
		Total	126	100	17	100	11	100
	Signatories	Non-core	-	-	116	50.0	21	26.9
		Healthy alt	-	-	8	3.4	52	66.7
		Non-specific	-	-	108	46.6	5	6.4
		Total	-	-	232	100	78	100

c) What marketing techniques are used?

The frequency per hour, total number and proportion (%) of advertisements featuring persuasive marketing techniques are compared for signatories and non-signatories over time in Table 68 to Table 76.

Adelaide FTA

From February 2009 AFGC signatories and non-signatories used persuasive marketing techniques; promotional characters, nutrition claims and premium offers. Advertisements with nutrition claims featured most frequently (Table 68).

Overall, premium offers and promotional characters were used in a higher proportion of food advertisements by signatories compared with non-signatories (except May 09). There is no clear pattern for the use of nutrition claims (Table 69).

From October 2009, QSRI signatories used nutrition claims and premium offers at a low rate (0.00-0.06 and 0.04-0.15 respectively) and did not use promotional characters. Non-signatories used all the persuasive marketing techniques at a low rate (0.00–0.06, equivalent to 1 advertisement per 17 hours). This is reflected in the low number of advertisements shown in Table 70.

The data was examined to see if promotional techniques featured more prominently to advertise non-core versus core foods.

Since February 2009 AFGC signatories used premium offers in 1–29.4% of non-core food ads and 0–9.1% of core food ads. Promotional characters were used in 2.9–56% of non-core ads and 0–50% of core ads. Nutrition claims techniques were used in 0–30.9% of non-core ads and 0–38.2 % of core ads. In comparison, non-signatories used premium offers in 0–3.3% of non-core food ads and 0–4.3% of core food ads. Promotional characters were used in 0–28.3% of non-core ads and 0–27.9 % of core ads. Nutrition claims techniques were used in 3.3–56.3% of non-core ads and 6.8–68.2% of core ads.

Since October 2010 QSRI signatories used premium offers in 0–19.5% of non-core ads and 0–29.2% of healthy alternative ads. Nutrition claims were used in 0.8% of non-core ads and used in 0–45.8% of healthy alternative ads.

The data is summarised in Figure 32 which shows the percentage of advertisements for core and non-core foods that featured promotional techniques from February 2009 to July 2010 for AFGC signatories and from October 2009 to July 2010 for QSRI signatories. The text below highlights the findings of the use of techniques in core and non-core food advertising.

AFGC signatories and non-signatories used all types of persuasive marketing techniques. In Adelaide, premium offers and promotional characters were used in a higher proportion of food advertisements by signatories compared with non-signatories.

For companies that signed the AFGC initiative at its commencement, promotional characters, premium offers and nutrition claims featured in a higher percentage of non-core compared with core food ads (see Figure 32). This difference was most marked for premium offers and nutrition claims. For non-signatories, promotional characters and premium offers are used in a similar percentage of non-core and core ads and nutrition claims are used in a greater percentage of core ads.

QSRI signatories used nutrition claims and premium offers at a low rate and did not use promotional characters. Premium offers were more likely to be used to advertise non-core foods by signatories and non-signatories (60.3% versus 12.1% for signatories, 25% versus 0% for non-signatories). Nutrition claims were more likely to be used to advertise healthy alternatives (18.9 versus 1.7 for signatories, 18.1 versus 9.1 for non-signatories), compared to premium offers which were used more often to advertise non-core food ads. However, due to the low number of ads, these comparisons may not be reliable and should be interpreted with caution.

Whyalla FTA

Since February 2009, AFGC signatories and non-signatories used all types of persuasive marketing techniques. Nutrition claims featured most frequently. Premium offers were used at a low rate by non-signatories (1 advertisement per 33 hours) (Table 71). Nutrition claims were used in a greater proportion of food advertisements by non-signatories. Premium offers were used in a greater proportion of food advertisements by signatories (Table 72).

Since March 2010, QSRI signatories used all types of persuasive marketing techniques, but the rate of advertising featuring each technique varied depending on the time point. Non-signatories did not use promotional characters or premium offers Table 71 and Table 73).

As shown in Table 72, AFGC signatories used premium offers in 0–34.1% of non-core food ads and not at all in core food ads, promotional characters in 0–15.5% non-core ads and not at all in core food ads, and nutrition claims in 0–19.9% non-core ads and 0–100% core ads. In comparison, non-signatories used premium offers in 0–2.5% miscellaneous ads only, promotional characters in 0–2.2% non-core ads 0–33% core ads, and nutrition claims in 0–61.9% non-core ads and 65.8-72% core ads.

As shown in Table 73, QSRI signatories used premium offers in 0% of non-core ads and 11 – 100% of healthy alternative ads, promotional characters in 0 – 44.9% of non-core ads and 0 – 100% of healthy alternative ads, and nutrition claims in 0% of non-core ads and 0 – 75% of healthy alternative ads. In comparison, non-signatories used nutrition claims in 0 – 11.8% non-core ads and 0% healthy alternative ads.

Figure 33 shows the use of promotional techniques in core and non-core ads over the period February 2009 to July 2010 for the AFCG Initiative and March 2010 to July 2010 for the QSRI Initiative.

AFGC Signatories used premium offers, nutrition claims and promotional characters more for non-core foods.

QSRI signatories used promotional characters more for non-core foods, whereas non signatories used nutrition claims for non-core foods. However, due to the low number of ads, these comparisons may not be reliable and should be interpreted with caution.

Pay TV

AFGC signatories and non-signatories used all types of persuasive marketing techniques. Nutrition claims featured more frequently for both company types (Table 74). This is reflected in the higher number of advertisements featuring nutrition claims.

QSRI signatories used nutrition claims and premium offers but did not use promotional characters. Non-signatories used all types of persuasive marketing techniques. Advertisements featuring persuasive techniques were more commonly used by non-signatories, particularly promotional characters and nutrition claims (Table 74 and Table 76).

As shown in Table 75 AFGC signatories used premium offers in 0 – 11.5% non-core ads and 0% core ads, promotional characters in 1.5–6.9% non-core ads and 0-9.1% core ads, and nutritional claims in 21.8-57.9% non-core ads and 32.4-100% core ads. In comparison, non-signatories used premium offers in 0-10.4% non-core ads and 0-62.2% core ads, and nutrition claims in 7.8-44.7% non-core ads and 4.4-93.3% core ads.

Since March 2010, QSRI signatories used promotional characters in 0 – 57.1% of non-core ads and 0% of healthy alternative ads, and premium offers were used in 100% of healthy alternative ads. In March and July 2010, only 7 ads were broadcast by non-signatories and persuasive techniques did not feature in any of the non-core or core food advertisements.

Figure 34 shows the use of promotional techniques in core and non-core ads over the period February 2009 to July 2010 for AFGC Initiative and March 2010 to July 2010 for the QSRI Initiative.

AFGC signatories used nutrition claims more in non-core food ads than core food ads.

QSRI signatories used premium offers most in advertising healthy alternatives. However, due to the low number of ads, this should be reliable and should be interpreted with caution.

In summary, there is considerable variability in the frequency per hour for type of marketing technique used by AFGC and QSRI signatories and non-signatories. The variability may reflect true differences, or seasonal variations, programming influences or company promotions; therefore, caution is required in the interpretation of the data.

AFGC signatories used all forms of persuasive marketing techniques. Promotional characters, nutrition claims and premium offers were used to varying degrees by signatories and non-signatories of the AFGC Initiative. Nutrition claims featured most prominently. Although there were some differences between signatories and non-signatories in the use of persuasive techniques at particular time points, overall there was no consistent pattern to suggest signatories and non-signatories were using the techniques differently.

QSRI signatories and non-signatories both used the persuasive techniques infrequently. No promotional characters featured in advertisements by signatories on Adelaide FTA and Pay TV or by non-signatories on Whyalla FTA. No premium offers were used by non-signatories on Whyalla FTA.

<u>Use of persuasive marketing techniques for core and non-core food ads</u>

AFGC signatories were more likely to use nutrition claims and premium offers to advertise non-core foods. With the exception of Pay TV, promotional characters were also used in a higher percentage of non-core food ads. For non signatories, promotional techniques featured equally in non-core and core ads, with some exceptions.

QSRI signatories were more likely to use nutrition claims to advertise healthy alternatives and promotional characters to advertise non-core foods. Premium offers were used more often to advertise non-core foods in Adelaide and core foods in Whyalla and Pay TV. There were considerably fewer advertisements by non-signatories particularly in Whyalla and Pay TV, however, in Adelaide, non signatories used premium offers and promotional technique to advertise non-core foods only and nutrition claims featured more often in core ads. However, due to the low number of ads, these comparisons may not be reliable and should be interpreted with caution.

Table 68 Frequency (rate) per hour for type of persuasive marketing technique used (promotional character, nutrition claim, premium) by company type (signatory company versus non- signatory company) for Adelaide free-to-air television over time points between Oct 2008 and July 2010

			Adelaide FTA					
			Oct-08†	Feb-09	May-09†	Oct-09	Mar-10	Jul-10
AFGC Initiative	Non-signatory	Promotional Character	0.28	0.52	0.23	0.12	0.21	0.00
		Nutrition Claim	0.66	0.54	0.31	0.85	0.43	0.73
		Premium	0.00	0.07	0.06	0.07	0.09	0.00
	Signatory	Promotional Character	-	0.11	0.11	0.24	0.24	0.03
		Nutrition Claim	-	0.21	0.00	0.38	0.48	0.44
		Premium	-	0.19	0.01	0.18	0.19	0.01
QSRI Initiative	Non-signatory	Promotional Character	0.26	0.17	0.00	0.00	0.06	0.00
		Nutrition Claim	0.36	0.05	0.08	0.04	0.00	0.02
		Premium	0.33	0.13	0.05	0.05	0.05	0.00
	Signatory	Promotional Character	-	-	-	0.00	0.00	0.00
		Nutrition Claim	-	-	-	0.01	0.06	0.00
		Premium	-	-	-	0.15	0.04	0.06

^Divided by 192 for all days and channels
†Data collected by AC Nielsen – fewer-food a

Table 69 Total number (n) and proportion (%) using persuasive marketing techniques to advertise foods (versus not; promotional character, nutrition claim, premium) comparing AFGC and Non-AFGC signatory companies by food category (core, non-core, miscellaneous and total) for Adelaide free-to-air television over time points between Oct 2008 and July 2010

			Adelaide FTA											
			Oct-08		Feb-09		May-09		Oct-09		Mar-10		Jul-10	
			n	*%*	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*%*
All other companies	Core	Promotional Character	9	16.1	41	27.9	4	18.2	17	9.2	18	14.1	0	.0
		Nutrition Claim	32	57.1	10	6.8	15	68.2	64	34.6	25	19.5	69	38.5
		Premium	0	.0	6	4.1	0	.0	8	4.3	0	.0	0	.0
	Non-core	Promotional Character	3	9.4	43	28.3	15	15.8	5	5.3	17	14.0	0	.0
		Nutrition Claim	18	56.3	32	21.1	36	37.9	48	51.1	4	3.3	26	28.3
		Premium	0	.0	0	.0	0	.0	0	.0	4	3.3	0	.0
	Miscellaneous	Promotional Character	42	22.8	16	9.4	25	21.6	1	.7	6	4.7	0	.0
		Nutrition Claim	76	41.3	61	35.7	8	6.9	52	37.7	54	42.2	45	33.8
		Premium	0	.0	7	4.1	12	10.3	5	3.6	14	10.9	0	.0
	Total	Promotional Character	54	19.9	100	21.3	44	18.9	23	5.5	41	10.9	0	.0
		Nutrition Claim	126	46.3	103	21.9	59	25.3	164	39.3	83	22.0	140	34.7
		Premium	0	.0	13	2.8	12	5.2	13	3.1	18	4.8	0	.0
AFGC Initiative Signatories	Core	Promotional Character	-	-	8	50.0	7	29.2	7	10.6	36	35.3	0	.0
		Nutrition Claim	-	-	6	37.5	0	.0	20	30.3	39	38.2	16	31.4
		Premium	-	-	0	.0	0	.0	6	9.1	7	6.9	0	.0
	Non-core	Promotional Character	-	-	14	11.1	14	56.0	40	19.1	10	5.7	6	2.9
		Nutrition Claim	-	-	26	20.6	0	.0	43	20.6	54	30.9	57	27.4
		Premium	-	-	37	29.4	2	8.0	25	12.0	29	16.6	2	1.0
	Miscellaneous	Promotional Character	-	-	0	.0	0	.0	0	.0	0	.0	0	.0
		Nutrition Claim	-	-	8	100.0	0	.0	10	31.3	0	.0	11	100
		Premium	-	-	0	.0	0	.0	4	12.5	0	.0	0	.0
	Total	Promotional Character	-	-	22	14.7	21	30.4	47	15.3	46	16.0	6	2.2
		Nutrition Claim	-	-	40	26.7	0	.0	73	23.8	93	32.3	84	31.1
		Premium	-	-	37	24.7	2	2.9	35	11.4	36	12.5	2	.7

†Data collected by AC Nielsen – fewer-food ads

Table 70 Total number (n) and proportion (%) of persuasive marketing techniques used to advertise foods (promotional character, nutrition claim, premium) comparing QSRI and Non- QSRI signatory companies by food category (non-core, healthy alternative, non-specific and total) for Adelaide free-to-air television over time points between Oct 2008 and July 2010

			Adelaide FTA											
			Oct-08		Feb-09		May-09		Oct-09		Mar-10		Jul-10	
			n	*%*	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*%*
All other companies	Non-Core	Promotional Character	23	11.6	19	9.5	0	.0	0	.0	1	3.8	0	.0
		Nutrition Claim	10	5.0	0	.0	12	4.4	0	.0	0	.0	4	5.2
		Premium	38	19.1	9	4.5	9	3.3	10	24.4	1	3.8	0	.0
	'Healthy' alt	Promotional Character	0	.0	13	33.3	0	.0	0	.0	0	.0	0	.0
		Nutrition Claim	33	100.0	9	23.1	4	57.1	8	100.0	0	.0	0	.0
		Premium	0	.0	7	17.9	0	.0	0	.0	0	.0	0	.0
	Non-Specific	Promotional Character	26	44.8	1	.8	0	.0	0	.0	11	84.6	0	.0
		Nutrition Claim	26	44.8	0	.0	0	.0	0	.0	0	.0	0	.0
		Premium	26	44.8	9	6.8	1	1.5	0	.0	9	69.2	0	.0
	Total	Promotional Character	49	16.9	33	8.9	0	.0	0	.0	12	15.4	0	.0
		Nutrition Claim	69	23.8	9	2.4	16	4.7	8	8.9	0	.0	4	4.8
		Premium	64	22.1	25	6.7	10	2.9	10	11.1	10	12.8	0	.0
QSRI Initiative	Non-Core	Promotional Character	-	-	-	-	-	-	0	.0	0	.0	0	.0
		Nutrition Claim	-	-	-	-	-	-	1	.8	0	.0	0	.0
		Premium	-	-	-	-	-	-	24	19.5	0	.0	11	6.0
	'Healthy' alt	Promotional Character	-	-	-	-	-	-	0	.0	0	.0	0	.0
		Nutrition Claim	-	-	-	-	-	-	0	.0	11	45.8	0	.0
		Premium	-	-	-	-	-	-	0	.0	7	29.2	0	.0
	Non-Specific	Promotional Character	-	-	-	-	-	-	0	.0	0	.0	0	.0
		Nutrition Claim	-	-	-	-	-	-	0	.0	0	.0	0	.0
		Premium	-	-	-	-	-	-	4	11.8	0	.0	0	.0
	Total	Promotional Character	-	-	-	-	-	-	0	.0	0	.0	0	.0
		Nutrition Claim	-	-	-	-	-	-	1	.6	11	6.6	0	.0
		Premium	-	-	-	-	-	-	28	17.8	7	4.2	11	6.0

†Data collected by AC Nielsen – fewer-food ads

Figure 32 Percentage (%) of core and non-core food advertisements using persuasive promotional techniques (promotional character, nutrition claim, premium)since February 2009 (AFGC) and October 2009 (QSRI) in Adelaide for free-to-air television

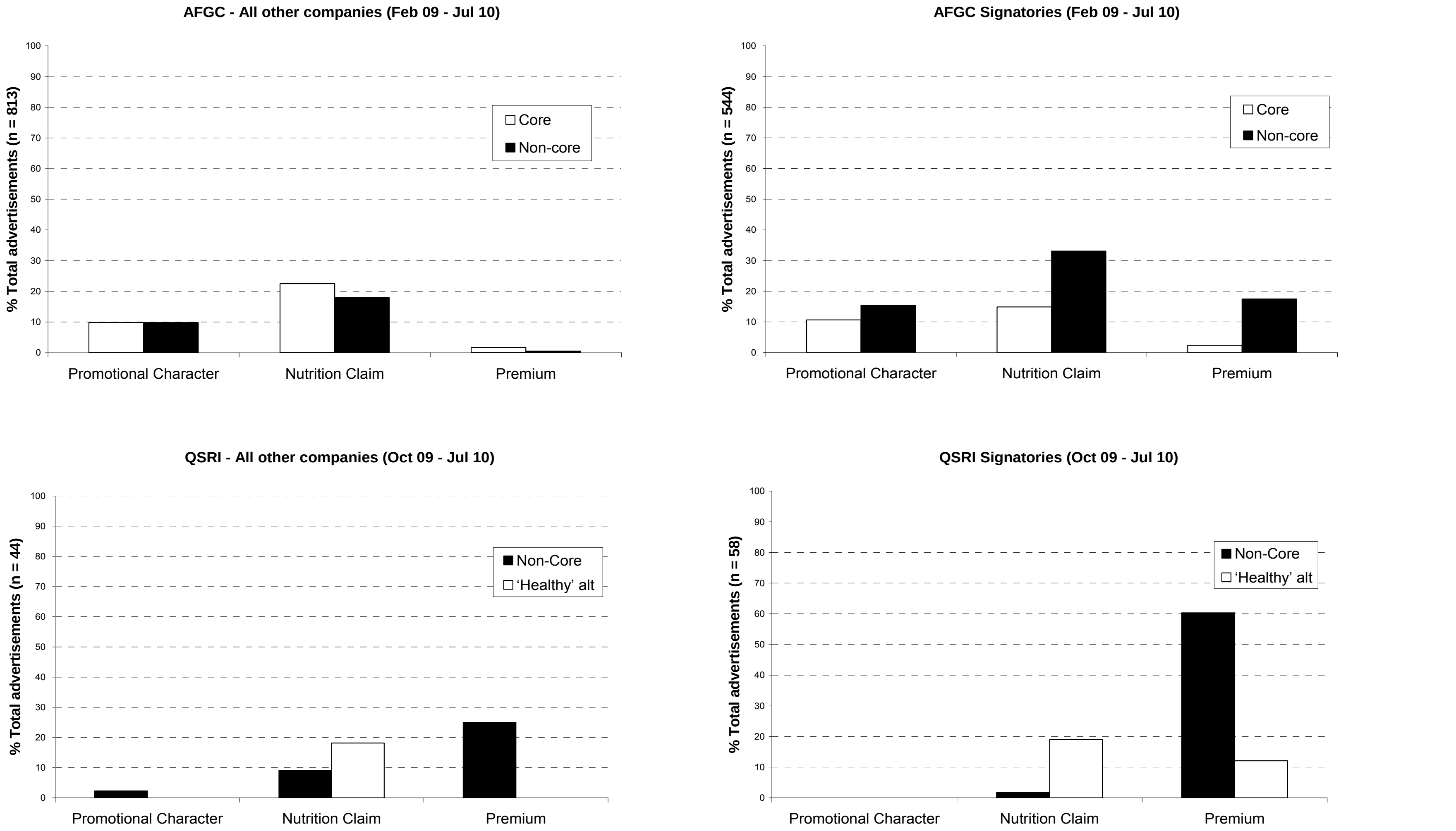


Table 71 Frequency (rate) per hour for type of persuasive marketing technique used (promotional character, nutrition claim, and premium) by company type (signatory company versus non- signatory company) for Whyalla free-to-air television over time points between Feb 2009 and July 2010

			Whyalla		
			Feb-09	Mar-10	Jul-10
AFGC Initiative	Non-signatory	Promotional Character	0.05	0.13	0.13
		Nutrition Claim	0.91	1.17	0.72
		Premium	0.00	0.03	0.00
	Signatory	Promotional Character	0.00	0.30	0.00
		Nutrition Claim	0.23	0.34	0.13
		Premium	0.22	0.67	0.00
QSRI Initiative	Non-signatory	Promotional Character	0.14	0.00	0.00
		Nutrition Claim	0.00	0.05	0.00
		Premium	0.19	0.00	0.00
	Signatory	Promotional Character	-	0.60	0.00
		Nutrition Claim	-	0.00	0.21
		Premium	-	0.19	0.03

^Divided by 128 for all days and channels

Table 72 Total number (n) and proportion (%) of persuasive marketing techniques used to advertise foods (promotional character, nutrition claim, premium) comparing AFGC and Non-AFGC signatory companies by food category (core, non-core, miscellaneous and total) for Whyalla free-to-air television over time points between Feb 2009 and July 2010

				Whyalla FTA					
				Feb-09		*Mar-10*		*Jul-10*	
				n	*%*	*n*	*%*	*n*	*%*
AFGC	All other companies	Core	Promotional Character	2	33.3	0	.0	0	.0
			Nutrition Claim	4	66.7	54	72.0	48	65.8
			Premium	0	.0	0	.0	0	.0
		Non-core	Promotional Character	4	2.2	0	.0	0	.0
			Nutrition Claim	112	61.9	0	.0	0	.0
			Premium	0	.0	0	.0	0	.0
		Miscellaneous	Promotional Character	0	.0	17	10.8	17	15.7
			Nutrition Claim	1	1.8	96	61.1	44	40.7
			Premium	0	.0	4	2.5	0	.0
		Total	Promotional Character	6	2.5	17	5.1	17	9.2
			Nutrition Claim	117	48.0	150	44.6	92	50.0
			Premium	0	.0	4	1.2	0	.0
	AFGC Initiative signatory	Core	Promotional Character	0	.0	0	.0	0	.0
			Nutrition Claim	0	.0	2	50.0	16	100.0
			Premium	0	.0	0	.0	0	.0
		Non-core	Promotional Character	0	.0	39	15.5	0	.0
			Nutrition Claim	29	19.9	41	16.3	0	.0
			Premium	28	19.2	86	34.1	0	.0
		Miscellaneous	Promotional Character	0	.0	0	.0	0	.0
			Nutrition Claim	0	.0	0	.0	0	.0
			Premium	0	.0	0	.0	0	.0
		Total	Promotional Character	0	.0	39	15.2	0	.0
			Nutrition Claim	29	19.9	43	16.8	16	11.9
			Premium	28	19.2	86	33.6	0	.0

Table 73 Total number (n) and proportion (%) of persuasive marketing techniques used to advertise foods (promotional character, nutrition claim, premium) comparing QSRI and Non- QSRI signatory companies by food category (core, non-core, miscellaneous and total) for Whyalla free-to-air television over time points between Feb 2009 and July 2010

				Whyalla FTA					
				Feb-09		*Mar-10*		*Jul-10*	
				n	*%*	*n*	*%*	*n*	*%*
QSRI	All other companies	Non-Core	Promotional Character	18	20.9	0	.0	0	.0
			Nutrition Claim	0	.0	0	.0	6	11.8
			Premium	0	.0	0	.0	0	.0
		‘Healthy’ alt	Promotional Character	0	.0	0	.0	0	.0
			Nutrition Claim	0	.0	0	.0	0	.0
			Premium	13	100.0	0	.0	0	.0
		Non-Specified	Promotional Character	0	.0	0	.0	0	.0
			Nutrition Claim	0	.0	0	.0	0	.0
			Premium	11	12.0	0	.0	0	.0
		Total	Promotional Character	18	9.4	0	.0	0	.0
			Nutrition Claim	0	.0	0	.0	6	10.0
			Premium	24	12.6	0	.0	0	.0
	QSRI Initiative	Non-Core	Promotional Character	-	-	0	.0	53	44.9
			Nutrition Claim	-	-	0	.0	0	.0
			Premium	-	-	0	.0	0	.0
		‘Healthy’ alt	Promotional Character	-	-	0	.0	24	100.0
			Nutrition Claim	-	-	27	75.0	0	.0
			Premium	-	-	4	11.1	24	100.0
		Non-Specified	Promotional Character	-	-	0	.0	0	.0
			Nutrition Claim	-	-	0	.0	0	.0
			Premium	-	-	0	.0	0	.0
		Total	Promotional Character	-	-	0	.0	77	51.7
			Nutrition Claim	-	-	27	16.5	0	.0
			Premium	-	-	4	2.4	24	16.1

Figure 33 Percentage (%) of core and non-core food advertisements using persuasive promotional techniques (promotional character, nutrition claim, premium)since February 2009 (AFGC) and March 2010 (QSRI) in Whyalla for free-to-air television

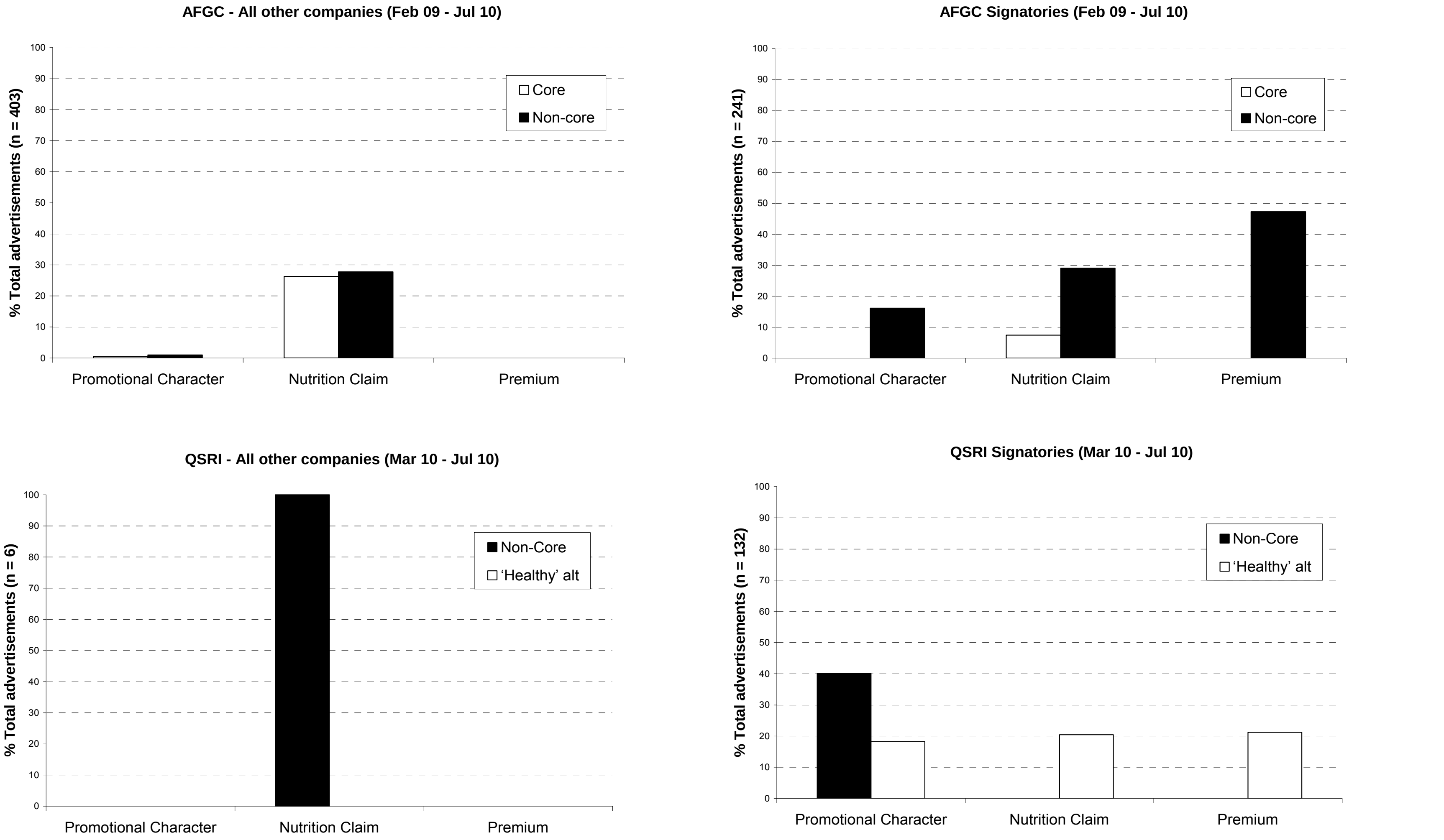


Table 74 Frequency (rate) per hour for type of persuasive marketing technique used (promotional character, nutrition claim, and premium) by company type (signatory company versus non- signatory company) for Adelaide Pay TV over time points between Feb 2009 and July 2010

			Pay TV		
			Feb-09	Mar-10	Jul-10
AFGC Initiative	Non-signatory	Promotional Character	0.04	0.00	0.15
		Nutrition Claim	0.13	0.35	0.13
		Premium	0.10	0.00	0.03
	Signatory	Promotional Character	0.02	0.04	0.02
		Nutrition Claim	0.09	0.28	0.43
		Premium	0.03	0.00	0.00
QSRI Initiative	Non-signatory	Promotional Character	0.00	0.02	0.15
		Nutrition Claim	0.00	0.00	0.22
		Premium	0.19	0.00	0.20
	Signatory	Promotional Character	-	0.00	0.00
		Nutrition Claim	-	0.03	0.00
		Premium	-	0.08	0.00

^Divided by 320 for all days and channels

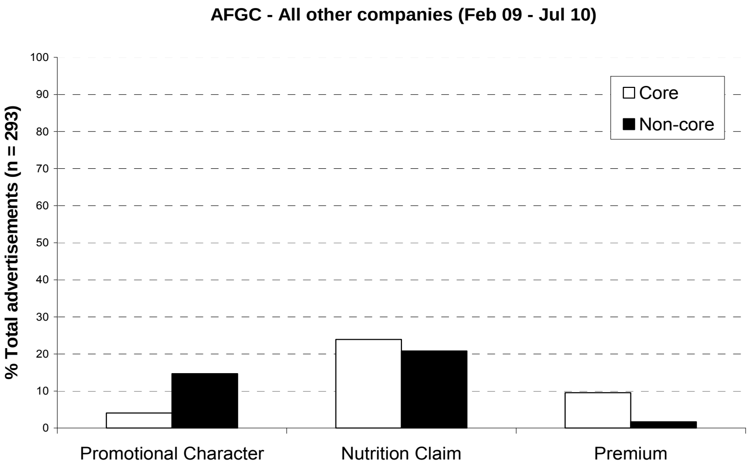
Table 75 Total number (n) and proportion (%) of persuasive marketing techniques used to advertise foods (promotional character, nutrition claim, premium) comparing AFGC and Non-AFGC signatory companies by food category (core, non-core, miscellaneous and total) for Adelaide Pay TV over time points between Feb 2009 and July 2010

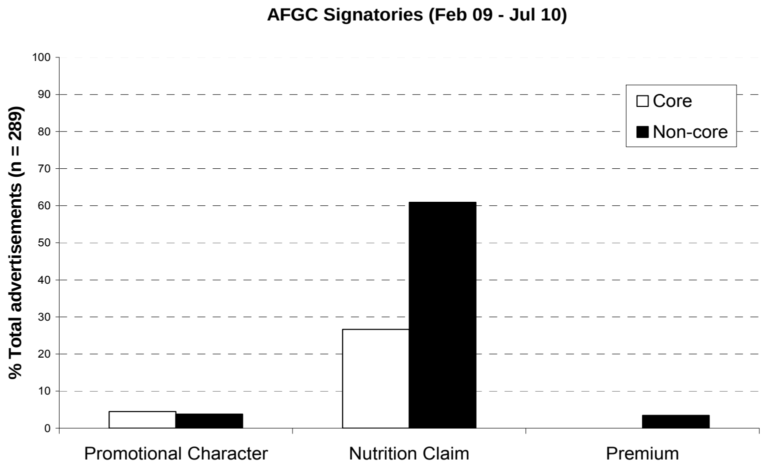
			Pay TV					
			Feb-09		Mar-10		Jul-10	
			n	%	n	%	n	%
All other companies	Core	Promotional Character	6	13.3	0	.0	6	16.7
		Nutrition Claim	2	4.4	56	93.3	12	33.3
		Premium	28	62.2	0	.0	0	.0
	Non-core	Promotional Character	6	12.5	0	.0	37	72.5
		Nutrition Claim	11	22.9	46	44.7	4	7.8
		Premium	5	10.4	0	.0	0	.0
	Miscellaneous	Promotional Character	0	.0	0	.0	4	13.8
		Nutrition Claim	27	87.1	10	55.6	24	82.8
		Premium	0	.0	0	.0	9	31.0
	Total	Promotional Character	12	9.7	0	.0	47	40.5
		Nutrition Claim	40	32.3	112	61.9	40	34.5
		Premium	33	26.6	0	.0	9	7.8
AFCG initiative	Core	Promotional Character	0	.0	10	6.8	3	9.1
		Nutrition Claim	8	100.0	48	32.4	21	63.6
		Premium	0	.0	0	.0	0	.0
	Non-core	Promotional Character	6	6.9	2	1.5	3	1.5
		Nutrition Claim	19	21.8	40	29.4	117	57.9
		Premium	10	11.5	0	.0	0	.0
	Miscellaneous	Promotional Character	0	.0	0	.0	0	.0
		Nutrition Claim	2	100.0	0	.0	0	.0
		Premium	0	.0	0	.0	0	.0
	Total	Promotional Character	6	6.2	12	4.2	6	2.6
		Nutrition Claim	29	29.9	88	31.0	138	58.7
		Premium	10	10.3	0	.0	0	.0

Table 76 Total number (n) and proportion (%) of persuasive marketing techniques used to advertise foods (promotional character, nutrition claim, premium) comparing QSRI and Non- QSRI signatory companies by food category (core, non-core, miscellaneous and total) for Adelaide Pay TV over time points between Feb 2009 and July 2010

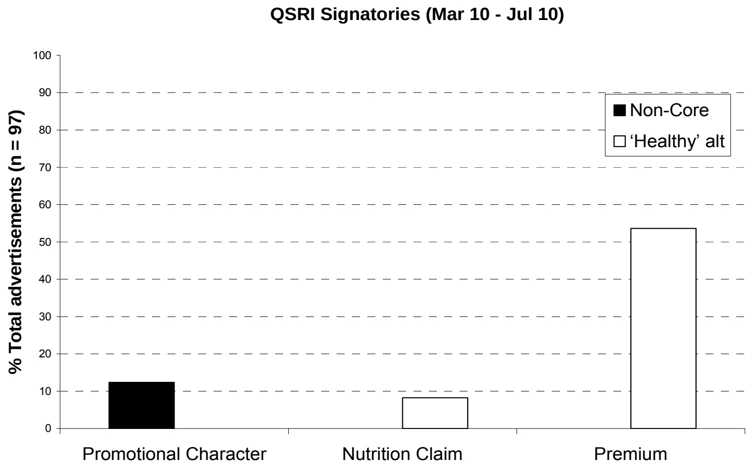
			Pay TV					
			Feb-09		Mar-10		Jul-10	
			n	%	n	%	n	%
All other companies	Non-Core	Promotional Character	0	.0	0	.0	0	.0
		Nutrition Claim	0	.0	0	.0	0	.0
		Premium	0	.0	0	.0	0	.0
	'Healthy' alt	Promotional Character	0	.0	0	.0	0	.0
		Nutrition Claim	0	.0	0	.0	0	.0
		Premium	50	89.3	0	.0	0	.0
	Non-Specific	Promotional Character	0	.0	7	100.0	0	.0
		Nutrition Claim	0	.0	0	.0	0	.0
		Premium	10	55.6	0	.0	0	.0
	Total	Promotional Character	0	.0	7	41.2	0	.0
		Nutrition Claim	0	.0	0	.0	0	.0
		Premium	60	57.7	0	.0	0	.0
QSRI initiative	Non-Core	Promotional Character	-	-	0	.0	12	57.1
		Nutrition Claim	-	-	0	.0	0	.0
		Premium	-	-	0	.0	0	.0
	'Healthy' alt	Promotional Character	-	-	0	.0	0	.0
		Nutrition Claim	-	-	8	100.0	0	.0
		Premium	-	-	0	.0	52	100.0
	Non-Specific	Promotional Character	-	-	0	.0	0	.0
		Nutrition Claim	-	-	0	.0	0	.0
		Premium	-	-	25	100.0	0	.0
	Total	Promotional Character	-	-	0	.0	12	16.0
		Nutrition Claim	-	-	8	5.4	0	.0
		Premium	-	-	25	16.8	52	69.3

Figure 34 Percentage (%) of core and non-core food advertisements using persuasive promotional techniques (promotional character, nutrition claim, premium)since February 2009 (AFGC) and March 2010 (QSRI) in Adelaide for Pay TV





QSRI – All other companies did not use persuasive marketing techniques in March 2010 and July 2010.



Considering the data above, what changes have there been:

a) From October 2008 until July 2010 for food advertising on FTA television; and in advertising by signatories to the AFGC and QSRI initiatives.

Additional tables were constructed to allow for comparisons between companies that never became signatories (never signatories) and those that were signatories. This was done in two ways. Firstly, changes in advertisements of companies who signed the agreement by the February 2009 data point were assessed with respect to pre and post-initiative advertising patterns. This was done in order to clearly assess changes by signatories across time. Secondly, companies who never became signatories were compared to those who were signatories in July 2010. This was done only for the pre-initiative (October 2008) and July 2010 time points. This comparison will better indicate the changes in non-signatories compared to signatories.

It should be noted that October 2008 is the only time point prior to the AFGC initiative and is also based on data provided by AC Nielsen. As established earlier, there are approximately one third fewer food advertisements in the AC Neilson data, which need to be considered in the interpretation of the results. Any differences between October 2008 data and other time points could be influenced by a number of factors and are not necessarily indicative of changes as a result of the initiative.

<u>Changes across time for February 2009 signatories of the AFGC Initiative</u>

Table 77 shows the frequency of advertisements for core, non-core and miscellaneous foods for companies that signed the initiative in February 2009. The rate of advertising for all food categories was generally lowest in October 2008. For example, the rate of non-core food advertising was 0.09 in October 2008 and ranged from 0.13-0.90 from February 2009 to July 2010. Non-core foods were depicted in 63% of food advertisements in Oct 08 and in 55.6–83.0% of advertisements in Feb 2009 to July 2010 (Table 78).

Table 79 shows the rate of food advertisements per hour using persuasive marketing techniques. The frequency of promotional techniques used was generally lowest at October 2008 and May 2009 (both AC Neilson data points). The rate of advertisements featuring nutrition claims was 0.14 in October 2008 and ranged from 0.00 to 0.34 between February 2009 and July 2010. The rate of advertisements featuring promotional characters was 0.01 in October 2008 and ranged from 0.03–0.13 for February 2009 to July 2010. The rate of adverts featuring premium offers was 0.00 in October 2008 and ranged from 0.01-0.19 in February 2009 to July 2010.

Table 80 shows the proportion of advertisements featuring promotional techniques for core and non-core foods. In 2008, AFGC signatories featured nutrition claims in 94.1% non-core ads and 0% core ads. In 2009, the proportion of ads ranged from was 0–20.6

for non-core and 0 – 37.5% core. In 2010, the range was 32.5–33.6% non-core and 33.6–40.8% core.

In 2008 signatories featured promotional characters in 5.9% non-core ads and 0% core ads. In 2009 the proportion of ads ranged from 11.1-14.7% for non-core and 0–50% core. In 2010, the range was 4.3-8.3% non-core and 0–10.2% core.

In 2008 signatories featured premium offers in 0% non-core and core ads. In 2009 premium offers featured in 8–29.4% non-core and 0–6.5% core ads. In 2010 the range was 1.4–8.3% non-core and 0–12.2% core.

Overall, no clear or consistent pattern of change was evident from October 2008 to July 2010 for companies that became signatories of the AFGC initiative in Feb 09.

Non-core foods were depicted in 63% of food advertisements in October 2008 and in 55.6–83.0% of advertisements in February 2009 to July 2010. No consistent pattern of change was evident from October 2008 to July 2010 for companies that became signatories of the AFGC initiative in February 2009 (see Figure 35).

Due to the low number of ads in October 2008 it is difficult to make any conclusions in regard to changes in use of persuasive techniques for non-core and core food advertising by signatories since October 2008.

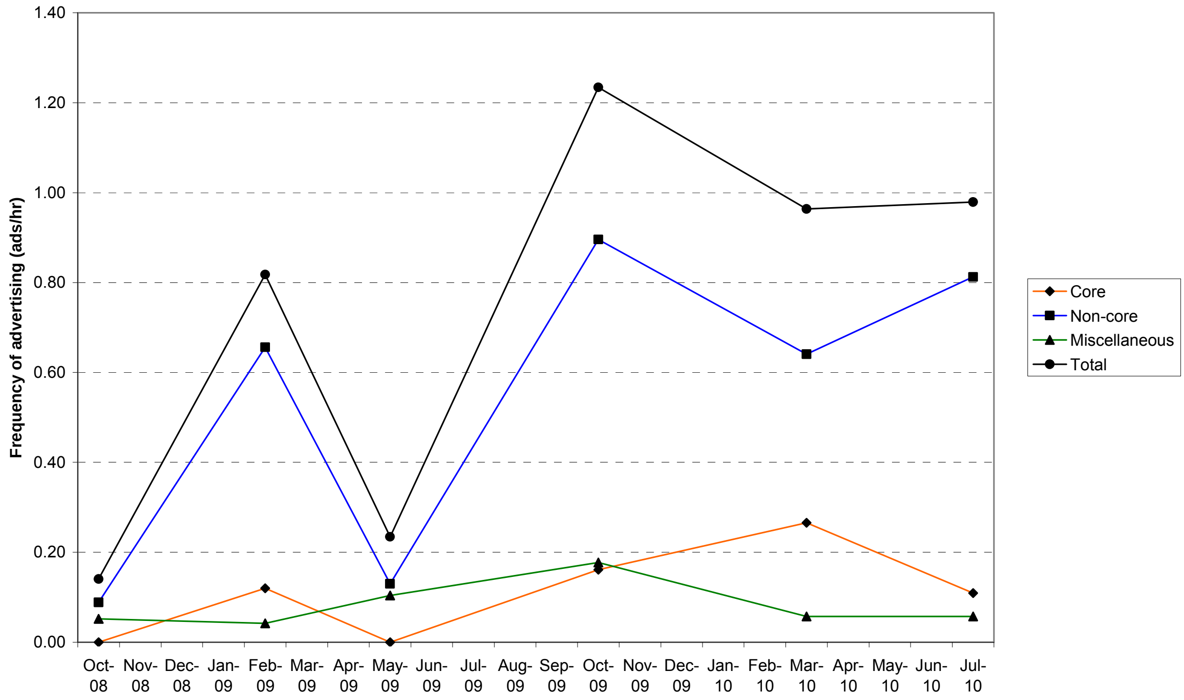


Figure 35: Frequency of food advertising (ads/hr) for each food category (core, non-core, miscellaneous and total) by February 2009 signatories to the AFCG initiative for Adelaide free-to-air television across time points between Oct 2008 and July 2010. *NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements*

Table 77 Frequency of food advertisements (ads/hr) by food category (core, non-core, miscellaneous and total) for companies that were AFGC signatories at Feb 2009 for Adelaide free-to-air television across time points between Oct 2008 and July 2010

		Adelaide FTA					
		Oct-08	Feb-09	May-09	Oct-09	Mar-10	Jul-10
AFGC Signatory at Feb 2009	Core	0.00	0.12	0.00	0.16	0.27	0.11
	Non-core	0.09	0.66	0.13	0.90	0.64	0.81
	Miscellaneous	0.05	0.04	0.10	0.18	0.06	0.06
	Total	0.14	0.82	0.23	1.23	0.96	0.98

^Divided by 192 for all days and channels

Table 78 Total number (n) and proportion (%) of food advertisements by food category (core, non-core, miscellaneous and total) for companies that were AFGC signatories at Feb 2009 for Adelaide free-to-air television across time points between Oct 2008 and July 2010

		Adelaide FTA											
		Oct-08[1]		Feb-09		May-09		Oct-09		Mar-10		Jul-10	
		n	%	n	%	n	%	n	%	n	%	n	%
AFGC Signatory at Feb 2009	Core	0	.0	23	14.6	0	.0	31	13.1	51	27.6	21	11.2
	Non-core	17	63.0	126	80.3	25	55.6	172	72.6	123	66.5	156	83.0
	Miscellaneous	10	37.0	8	5.1	20	44.4	34	14.3	11	5.9	11	5.9
	Total	27	100.0	157	100.0	45	100.0	237	100.0	185	100.0	188	100.0

[1]Pre-initative advertising

Table 79 Frequency of food advertisements (ads/hr) using persuasive marketing techniques (promotional character, nutrition claim, and premium) by food category for companies that were AFGC signatories at Feb 2009 for Adelaide free-to-air television across time points between Oct 2008 and July 2010

		Adelaide FTA					
		Oct-08	Feb-09	May-09	Oct-09	Mar-10	Jul-10
AFGC Signatory at Feb 2009	Nutrition Claim	0.14	0.21	0.00	0.26	0.31	0.34
	Promotional Character	0.01	0.11	0.07	0.13	0.08	0.03
	Premium	0.00	0.19	0.01	0.11	0.08	0.01

^Divided by 192 for all days and channels

Table 80 Total number (n) and proportion (%) of persuasive marketing techniques used (promotional character, nutrition claim, and premium) by food category (core, non-core, miscellaneous and total) for companies that were AFGC signatories at Feb 2009 for Adelaide free-to-air television across time points between Oct 2008 and July 2010

			Adelaide FTA											
			Oct-08		Feb-09		May-09		Oct-09		Mar-10		Jul-10	
			n	*%*	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*%*
AFGC Signatory at Feb 2009	Core	Promotional Character	0	.0	8	50.0	0	.0	2	6.5	5	10.2	0	.0
		Nutrition Claim	0	.0	6	37.5	0	.0	11	35.5	20	40.8	7	33.3
		Premium	0	.0	0	.0	0	.0	2	6.5	6	12.2	0	.0
	Non-core	Promotional Character	1	5.9	14	11.1	14	56.0	23	14.7	10	8.3	6	4.3
		Nutrition Claim	16	94.1	26	20.6	0	.0	29	18.6	39	32.5	47	33.6
		Premium	0	.0	37	29.4	2	8.0	16	10.3	10	8.3	2	1.4
	Misc	Promotional Character	0	.0	0	.0	0	.0	0	.0	0	.0	0	.0
		Nutrition Claim	10	100.0	8	100.0	0	.0	10	31.3	0	.0	11	100.0
		Premium	0	.0	0	.0	0	.0	4	12.5	0	.0	0	.0
	Total	Promotional Character	1	3.7	22	14.7	14	31.1	25	11.4	15	8.3	6	3.5
		Nutrition Claim	26	96.3	40	26.7	0	.0	50	22.8	59	32.8	65	37.8
		Premium	0	.0	37	24.7	2	4.4	22	10.0	16	8.9	2	1.2

†Data collected by AC Nielsen – fewer-food ads

Changes by July 2010 signatories of the AFGC Initiative

Table 81 shows the frequency of advertisements for core, non-core and miscellaneous foods for October 2008 and July 2010 for all companies that became AFGC signatories by Jul 10 and companies that were never signatories. The rate of advertising for both non-core and core foods was lowest in October 2008 for signatories and non-signatories. For example, the rate of non-core food advertising by signatories was 0.09 in October 2008 and 1.17 in July 2010. The rate of non-core food advertising by non-signatories was 0.08 in October 2008 and 0.52 in July 2010.

As shown in Table 82, non-core foods were depicted by signatories in 40.5% of advertisements in October 2008 and in 78.3% of advertisements in July 2010. For non-signatories, the proportions were 6.5% in October 2008 and 23.5% in July 2010. Therefore the difference is higher between times for the non-signatories compared to signatories (see summary Figure 36).

Table 83 shows the frequency per hour of persuasive marketing techniques used to advertise foods. The rate of adverts featuring nutrition claims by signatories was 0.18 in October 2008 and 0.44 in July 2010. For promotional characters the proportions were 0.02 in October 2008 and 0.03 in July 2010; and for premium offer 0.00 in October 2008 and 0.01 in July 2010.

For non-signatories the rate of advertisements featuring nutrition claims was 0.47 in October 2008 and 0.73 in July 2010; for promotional characters 0.25 in October 2008 and 0.00 in July 2010; and for premium offers 0.00 in October 2008 and 0.00 in July 2010.

Table 84 shows the proportion of advertisements featuring promotional techniques for core and non-core foods. In 2008, AFGC signatories featured nutrition claims in 94.1% non-core ads and 60% core ads. In 2010, nutrition claims featured in 27.4% non-core and 31.4% core. The proportion of signatory ads featuring promotional characters was in 2008, 5.9% non-core and 20% core, and in 2010, 2.9% non-core and 0% core. Premium offers featured in 1% non-core ads in 2010 only.

For non-signatories, nutrition claims featured in 13.3% non-core and 56.1% core ads in 2008, and 28.3 non-core and 38.5% core ads in 2010. Promotional characters featured in 13.3% non-core and 14.6% core ads in 2008, and not at all in 2010. Premium offers did not feature at all.

Table 84 shows the proportion of advertisements featuring persuasive marketing techniques for core and non-core foods. Caution is needed in interpretation due to small cell sizes. In 2008, AFGC signatories featured nutrition claims in 94.1% non-core ads and 60% core ads. In 2010, nutrition claims featured in 27.4% non-core and 31.4% core ads. The proportion of signatory ads featuring promotional characters was in 2008, 5.9% non-core and 20% core, and in 2010, 2.9% non-core and 05 core. Premium offers featured in 1% non-core ads in 2010 only.

For non-signatories, nutrition claims featured in 13.3% non-core and 56.1% core ads in 2008, and 28.3% non-core and 38.5% core ads in 2010. Promotional characters featured infrequently in 2008 and not at all in 2010. Premium offers did not feature at all.

There were more advertisements for non-core foods in July 2010 compared to October 2008. Although this is likely the artefact of different data collection methods, the proportion of food advertising that is non-core foods appears to have tripled for non-signatories while it has almost doubled for signatories.

For both signatories and non-signatories the percentage of core ads using nutrition claims decreased. This trend was similar for non-core ads by signatories, while non-signatories showed an increase from 2008 to 2010 (note: small cell count in 2008). Promotional characters and premium offers were used infrequently at both time points by signatories and non-signatories.

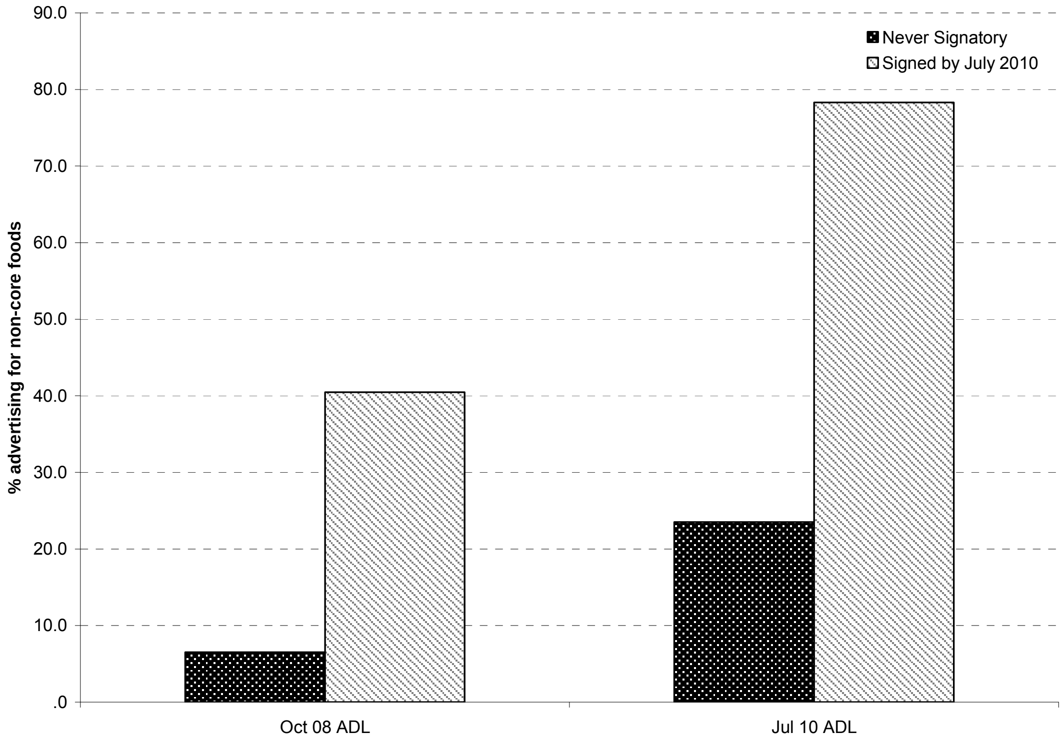


Figure 36: Percent (%) non-core food advertisements (as a proportion of total food advertising) for signatories of the AFGC initiative in July 2010 versus never-signatories for Adelaide free-to-air television for Oct 2008 and Jul 2010. *NB October 2008 is produced from AC Nielsen data which had fewer advertisements*

Table 81 Frequency of food advertisements (ads/hr) by food category (core, non-core, miscellaneous and total) for signatories of the AFGC initiative in July 2010 versus never-signatories for Adelaide free-to-air television for Oct 2008 and Jul 2010

		Adelaide FTA	
		Oct-08	Jul-10
Not Signatory	Core	0.21	0.94
	Non-core	0.08	0.52
	Miscellaneous	0.91	0.76
	Total	1.20	2.21
Signatory at July 2010	Core	0.08	0.27
	Non-core	0.09	1.17
	Miscellaneous	0.05	0.06
	Total	0.22	1.49

^Divided by 192 for all days and channels

Table 82 Total number (n) and proportion (%) of advertisements by food category (core, non-core, miscellaneous and total) for signatories of the AFGC initiative in July 2010 versus never-signatories for Adelaide free-to-air television for Oct 2008 and Jul 2010

		Adelaide FTA			
		Oct-08		Jul-10	
		n	%	n	%
Not Signatory	Core	41	17.8	180	42.4
	Non-core	15	6.5	100	23.5
	Miscellaneous	174	75.7	145	34.1
	Total	230	100.0	425	100.0
Signatory at July 2010	Core	15	35.7	51	17.8
	Non-core	17	40.5	224	78.3
	Miscellaneous	10	23.8	11	3.8
	Total	42	100.0	286	100.0

Table 83 Frequency of food advertisements (ads/hr) by type of persuasive marketing technique used (promotional character, nutrition claim, and premium) for signatories of the AFGC initiative in July 2010 versus never-signatories for Adelaide free-to-air television for Oct 2008 and Jul 2010

		Adelaide FTA	
		Oct-08	Jul-10
Not Signatory	Nutrition Claim	0.47	0.73
	Promotional Character	0.26	0.00
	Premium	0.00	0.00
Signatory at July 2010	Nutrition Claim	0.18	0.44
	Promotional Character	0.02	0.03
	Premium	0.00	0.01

^Divided by 192 for all days and channels

Table 84 Total number (n) and proportion (%) of advertisements using persuasive marketing techniques (promotional character, nutrition claim, and premium) by food category (core, non-core, miscellaneous and total) for signatories of the AFGC initiative in July 2010 versus never-signatories for Adelaide free-to-air television for Oct 2008 and Jul 2010

			Adelaide FTA			
			Oct-08		Jul-10	
			n	%	n	%
Not Signatory	Core	Promotional Character	6	14.6	0	.0
		Nutrition Claim	23	56.1	69	38.5
		Premium	0	.0	0	.0
	Non-core	Promotional Character	2	13.3	0	.0
		Nutrition Claim	2	13.3	26	28.3
		Premium	0	.0	0	.0
	Miscellaneous	Promotional Character	42	24.1	0	.0
		Nutrition Claim	66	37.9	45	33.8
		Premium	0	.0	0	.0
	Total	Promotional Character	50	21.7	0	.0
		Nutrition Claim	91	39.6	140	34.7
		Premium	0	.0	0	.0
Signatory at July 2010	Core	Promotional Character	3	20.0	0	.0
		Nutrition Claim	9	60.0	16	31.4
		Premium	0	.0	0	.0
	Non-core	Promotional Character	1	5.9	6	2.9
		Nutrition Claim	16	94.1	57	27.4
		Premium	0	.0	2	1.0
	Miscellaneous	Promotional Character	0	.0	0	.0
		Nutrition Claim	10	100.0	11	100.0
		Premium	0	.0	0	.0
	Total	Promotional Character	4	9.5	6	2.2
		Nutrition Claim	35	83.3	84	31.1
		Premium	0	.0	2	.7

†Data collected by AC Nielsen – fewer-food ads

Changes by signatories of the QSRI Initiative from October 2008 to July 2010

For the QSRI Initiative there were three pre-initiative time points (Oct 08, Feb 09, May 09) and three post-initiative time points (Oct 09, Mar 10, Jul 10). All companies signed the QSRI Initiative in October 2009.

Table 85 shows that between October 2008 and July 2010 the rate of non-core food advertising has remained about the same for non-signatories while it has increased for QSRI signatories. Both signatories and non-signatories had a spike in non-core food advertising in May 2009 before a decrease to the October 2009 time point. Since then the rate of non-core food advertising by signatories has increased to levels beyond October 2008 and the peak seen in May 2009.

As shown in Table 86, the proportion of non-core food advertisements ranged from 80.1-87.7% pre-initiative to 78.2-95.3% post-initiative for signatories. For non-signatories, the proportion of non-core food advertisements ranged from 51.2-69.3% pre-initiative to 33.3-92.8% post-initiative.

Table 87 shows the frequency per hour of persuasive marketing techniques used by QSRI signatories and non-signatories pre and post-initiative. There was very little change by signatories from October 2008/May 2009 to October 2009/July 2010. Non-signatories featured persuasive techniques most frequently in October 2008.

As shown in Table 88, the use of persuasive marketing techniques was inconsistent by signatories and non-signatories across time. Signatories featured promotional characters in 0 – 2.4% non-core and 0-56.5% healthy alternative ads prior to the initiative and in 0% of non-core and core food ads post initiative. Nutrition claims featured in 0% advertisements prior to the initiative in 0 – 0.0% non-core and 0 – 45.8% healthy alternative ads post initiative. Premium offers featured in 1.3-13.9 non-core and 0-30.4% healthy alternative ads prior to the initiative and 0-19.5% non-core and 0-29.2% healthy alternative ads post initiative.

In comparison, ads by companies that were never signatories featured promotional characters in 0-37.1% non-core and 0% healthy alternative ads prior to the initiative and 0-3.8% non-core and 0-100% healthy alternative ads post initiative. Nutrition claims featured in 0-16.1% non-core and 56.3-100% healthy alternative ads prior to the initiative and 0-5.2% non-core and 0-24.45 healthy alternative ads post initiative. Premium offers featured in 6.2-30.6% non-core and 0% healthy alternative ads prior the initiative and 0-24.4% non-core and 0% healthy alternative ads post initiative.

Between October 2008 and July 2010 the rate of non-core food advertising has increased for signatories and non-signatories alike (see Figure 37).

The rate of advertising featuring persuasive marketing techniques is low and has remained relatively consistent for non-signatories, although nutrition claims and premium offers featured less often in non-core food advertisement post initiative. For signatories, promotional characters have not featured at all since the initiative, but nutrition claims featured more often in ads for healthy alternatives (11 ads in March 2010) and promotional characters featured less often in ads for healthy alternatives.

Due to the small number of advertisements in some cells, interpretation relating to use of persuasive marketing techniques should be made with caution.

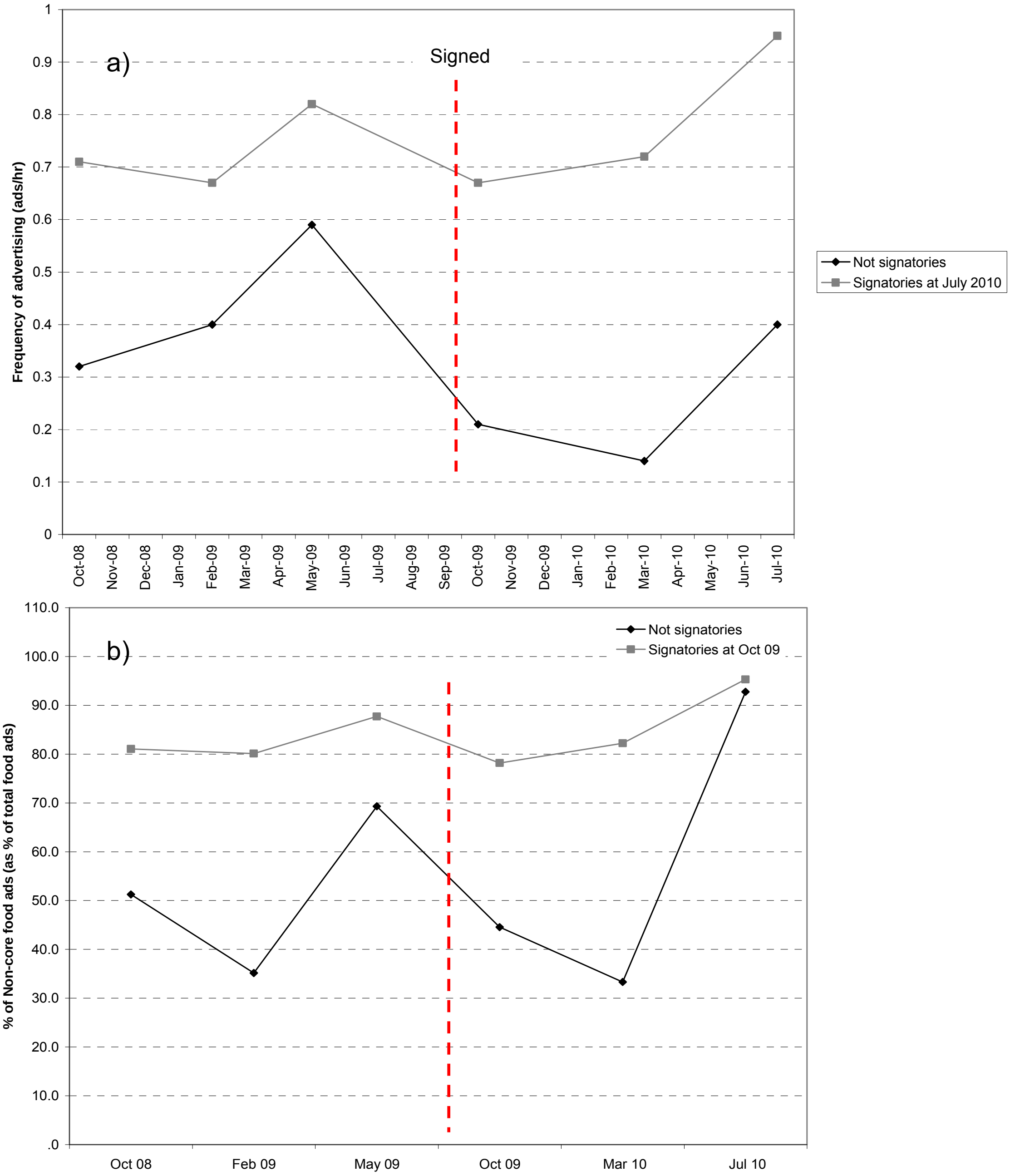


Figure 37: a) Frequency of non-core food advertising (ads/hr) for signatories of the QSRI initiative in July 2010 versus never-signatories and b) proportion of non-core food ads (as % of total food advertising) for signatories of the QSRI initiative in Oct 2009 versus never-signatories for Adelaide free-to-air television across time points between Oct 2008 and July 2010. *NB October 2008 and May 2009 are produced from AC Nielsen data which had fewer advertisements*

Table 85 Frequency of food advertisements (ads/hr)* by food category (non-core, healthy alternative, non-specific and total) for signatories of the QSRI initiative in Oct 2009 versus non-signatories for Adelaide free-to-air television across time points between Oct 2008 and Jul 2010

		Adelaide FTA					
		Oct-08	Feb-09	May-09	Oct-09	Mar-10	Jul-10
Not Signatory	Non-core	0.32	0.40	0.59	0.21	0.14	0.40
	Healthy alt	0.17	0.08	0.02	0.05	0.20	0.00
	Non-specific	0.14	0.66	0.24	0.21	0.07	0.03
	Total	0.63	1.14	0.85	0.48	0.41	0.43
Signatory at Oct 2009	Non-core	0.71	0.67	0.82	0.67	0.72	0.95
	Healthy alt	0.00	0.12	0.02	0.01	0.13	0.00
	Non-specific	0.17	0.05	0.10	0.18	0.03	0.05
	Total	0.88	0.84	0.93	0.86	0.88	1.00

*Divided by 192 for all days and channels

Table 86 Total number (n) and proportion (%) of advertisements by food category (non-core, healthy alternative, non-specific and total) for signatories of the QSRI initiative in Oct 2009 versus non-signatories for Adelaide free-to-air television across time points between Oct 2008 and Jul 2010

		Adelaide FTA											
		Oct-08		Feb-09		May-09		Oct-09		Mar-10		Jul-10	
		n	%	n	%	n	%	n	%	n	%	n	%
Not Signatory	Non-core	62	51.2	77	35.2	113	69.3	41	44.6	26	33.3	77	92.8
	Healthy alt	33	27.3	16	7.3	4	2.5	10	10.9	39	50.0	0	.0
	Non-specific	26	21.5	126	57.5	46	28.2	41	44.6	13	16.7	6	7.2
	Total	121	100.0	219	100.0	163	100.0	92	100.0	78	100.0	83	100.0
Signatory at Oct 2009	Non-core	137	81.1	129	80.1	157	87.7	129	78.2	139	82.2	183	95.3
	Healthy alt	0	.0	23	14.3	3	1.7	1	.6	24	14.2	0	.0
	Non-specific	32	18.9	9	5.6	19	10.6	35	21.2	6	3.6	9	4.7
	Total	169	100.0	161	100.0	179	100.0	165	100.0	169	100.0	192	100.0

Table 87 Frequency of food advertisements (ads/hr) by type of persuasive marketing technique used (promotional character, nutrition claim, and premium) for signatories of the QSRI initiative in Oct 2009 versus non-signatories for Adelaide free-to-air television across time points between Oct 2008 and Jul 2010

		Adelaide FTA					
		Oct-08	Feb-09	May-09	Oct-09	Mar-10	Jul-10
Not Signatory	Promotional Character	0.26	0.08	0.00	0.00	0.06	0.00
	Nutrition Claim	0.36	0.05	0.08	0.04	0.00	0.02
	Premium	0.23	0.03	0.04	0.05	0.05	0.00
Signatory at Oct 2009	Promotional Character	0.00	0.09	0.00	0.00	0.00	0.00
	Nutrition Claim	0.00	0.00	0.00	0.01	0.06	0.00
	Premium	0.10	0.10	0.02	0.15	0.04	0.06

Divided by 192 for all days and channels

Table 88 Total number (n) and proportion (%) of advertisements using persuasive marketing techniques (promotional character, nutrition claim, and premium) by food category (non-core, healthy alternative, non-specific and total) for signatories of the QSRI initiative in Oct 2009 versus non-signatories for Adelaide free-to-air television across time points between Oct 2008 and Jul 2010

			Adelaide FTA											
			Oct-08		*Feb-09*		*May-09*		*Oct-09*		*Mar-10*		*Jul-10*	
			n	%	n	%	n	%	n	%	n	%	n	%
Never Signatory	Non-Core	Nutrition Claim	10	16.1	0	.0	12	10.6	0	.0	0	.0	4	5.2
		Promotional Character	23	37.1	16	20.8	0	.0	0	.0	1	3.8	0	.0
		Premium	19	30.6	6	7.8	7	6.2	10	24.4	1	3.8	0	.0
	‘Healthy’ alt	Nutrition Claim	33	100.0	9	56.3	4	100.0	8	100.0	0	.0	0	.0
		Promotional Character	0	.0	0	.0	0	.0	0	.0	0	.0	0	.0
		Premium	0	.0	0	.0	0	.0	0	.0	0	.0	0	.0
	Non-Specified	Nutrition Claim	26	100.0	0	.0	0	.0	0	.0	0	.0	0	.0
		Promotional Character	26	100.0	0	.0	0	.0	0	.0	11	84.6	0	.0
		Premium	26	100.0	0	.0	0	.0	0	.0	9	69.2	0	.0
	Total	Nutrition Claim	69	57.0	9	4.2	16	9.8	8	8.9	0	.0	4	4.8
		Promotional Character	49	40.5	16	7.4	0	.0	0	.0	12	15.4	0	.0
		Premium	45	37.2	6	2.8	7	4.3	10	11.1	10	12.8	0	.0
Signatory at October 2009	Non-Core	Nutrition Claim	0	.0	0	.0	0	.0	1	.8	0	.0	0	.0
		Promotional Character	0	.0	3	2.4	0	.0	0	.0	0	.0	0	.0
		Premium	19	13.9	3	2.4	2	1.3	24	19.5	0	.0	11	6.0
	‘Healthy’ alt	Nutrition Claim	0	.0	0	.0	0	.0	0	.0	11	45.8	0	.0
		Promotional Character	0	.0	13	56.5	0	.0	0	.0	0	.0	0	.0
		Premium	0	.0	7	30.4	0	.0	0	.0	7	29.2	0	.0
	Non-Specified	Nutrition Claim	0	.0	0	.0	0	.0	0	.0	0	.0	0	.0
		Promotional Character	0	.0	1	11.1	0	.0	0	.0	0	.0	0	.0
		Premium	0	.0	9	100.0	1	5.3	4	11.8	0	.0	0	.0
	Total	Nutrition Claim	0	.0	0	.0	0	.0	1	.6	11	6.6	0	.0
		Promotional Character	0	.0	17	10.9	0	.0	0	.0	0	.0	0	.0
		Premium	19	11.2	19	12.2	3	1.7	28	17.8	7	4.2	11	6.0

Advertising during C-Programs
The responsible marketing to children initiatives discusses limiting advertising of non-core food products during C-rated programs.

It is clear non-core food advertising during C-rated programs is low with signatories broadcasting a low rate of non-core foods in C-programs (see Table 89). However, prior to signing the QSRI agreement, fast food restaurants did not advertise non-core foods during C-rated programs

Table 89: Total number (n) and proportion (%) of foods advertise during Children's (C) rated programs by food category for signatories and non-signatories of the AFGC and QSRI initiatives for Adelaide free-to-air television across time points between Oct 2008 and Jul 2010

			Adelaide FTA^							
			Feb-09*		Oct-09		Mar-10		Jul-10	
			n	%	n	%	n	%	n	%
AFGC Initiative	All other companies	Core	3	27.3	7	100.0	2	40.0	7	100.0
		Non-core	6	54.5	0	.0	3	60.0	0	.0
		Miscellaneous	2	18.2	0	.0	0	.0	0	.0
		Total	11	100.0	7	100.0	5	100.0	7	100.0
	Yes	Core	0	.0	0	.0	2	50.0	0	.0
		Non-core	0	.0	1	100.0	2	50.0	2	100.0
		Miscellaneous	0	.0	0	.0	0	.0	0	.0
		Total	0	.0	1	100.0	4	100.0	2	100.0
QSRI Initiative	All other companies	Non-core	0	.0	0	.0	0	.0	0	.0
		Health Alt	4	100.0	0	.0	0	.0	0	.0
		Non-specific	0	.0	0	.0	1	100.0	0	.0
		Total	4	100.0	0	.0	1	100.0	0	.0
	Yes	Non-core	-	-	0	.0	0	.0	0	.0
		Health Alt	-	-	0	.0	4	100.0	0	.0
		Non-specific	-	-	0	.0	0	.0	0	.0
		Total	-	-	0	.0	4	100.0	0	.0

*No signatories for the QSRI initiative before October 2009
^No advertising was captured in the October 2008 and May 2009 data sets

b) From February 2009 until July 2010 for food advertising on Pay TV; and in advertising by signatories to the AFGC and QSRI initiatives.

AFGC Initiative

For Pay TV there are three post-initiative time points (Feb 09, Mar 10, Jul 10). There is no comparative data for non-signatories as explained previously.

The rate of non-core food advertising by signatories increased from February 2009 to July 2010 due to the higher number of advertisements for non-core foods (Table 90 and Table 91). Core food advertising however was highest in March 2010.

There was no change in the frequency of persuasive promotion techniques used by signatories over time
Table 92.

Nutrition claims were the most common persuasive marketing technique used by signatories and remained relatively similar over time for core and non-core ads. (Table 93). The proportion percentage of non-core ads using nutrition claims was 21.8 – 31.8% in non-core food ads and 61.5 – 100% core food ads. Promotional characters and premium offers were infrequently used. One exception was premium offers that featured in February 2009 only (11.5%, n= 10)

On Pay TV, the rate of non-core food advertising by signatories increased from February 2009 to July 2010.

There was no change by signatories in the use of persuasive marketing techniques over time.

Table 90 Frequency of food advertisements (ads/hr) by food category (core, non-core, miscellaneous and total) for companies that were signatories to the AFGC initiative at February 2009 for Adelaide Pay TV across time points between Feb 2009 and July 2010.

		Pay TV		
		Feb-09	Mar-10	Jul-10
Signatory at Feb 2009	Core	0.03	0.08	0.04
	Non-core	0.27	0.28	0.39
	Miscellaneous	0.01	0.00	0.00
	Total	0.30	0.36	0.43

Divided by 320 for all days and channels

Table 91 Total number (n) and proportion (%) of total food advertisements by food category (core, non-core, miscellaneous and total) for companies that were signatories to the AFGC initiative at February 2009 for Adelaide Pay TV across time points between Feb 2009 and July 2010.

		Pay TV					
		Feb-09		Mar-10		Jul-10	
		n	%	n	%	n	%
Signatory at Feb 2009	Core	8	8.2	26	22.8	13	9.4
	Non-core	87	89.7	88	77.2	125	90.6
	Miscellaneous	2	2.1	0	.0	0	.0
	Total	97	100.0	114	100.0	138	100.0

Table 92 Frequency of food advertisements (ads/hr) featuring versus not featuring persuasive marketing techniques (promotional character, nutrition claim, and premium) for companies that were signatories to the AFGC initiative at February 2009 for Adelaide Pay TV across time points between Feb 2009 and July 2010.

			Pay TV		
			Feb-09	Mar-10	Jul-10
Signatory at Feb 2009	Nutrition Claim	None	0.21	0.22	0.24
		Yes	0.09	0.14	0.14
	Promotional Character	None	0.28	0.35	0.38
		Yes	0.02	0.01	0.01
	Premium	None	0.27	0.36	0.39
		Yes	0.03	0.00	0.00

Divided by 320 for all days and channels

Table 93 Total number (n) and proportion (%) of advertisements using persuasive marketing techniques (promotional character, nutrition claim, and premium) by food category (core, non-core, miscellaneous and total) for signatories of the AFGC initiative in July 2010 versus never-signatories for Adelaide Pay TV across time points between Feb 2009 and Jul 2010

			Pay TV					
			Feb-09		*Mar-10*		*Jul-10*	
			n	*%*	*n*	*%*	*n*	*%*
Signatory at Feb 2009	Core	Promotional Character	0	.0	0	.0	0	.0
		Nutrition Claim	8	100.0	16	61.5	13	100.0
		Premium	0	.0	0	.0	0	.0
	Non-core	Promotional Character	6	6.9	2	2.3	3	2.7
		Nutrition Claim	19	21.8	28	31.8	33	29.7
		Premium	10	11.5	0	.0	0	.0
	Miscellaneous	Promotional Character	0	.0	0	.0	0	.0
		Nutrition Claim	2	100.0	0	.0	0	.0
		Premium	0	.0	0	.0	0	.0
	Total	Promotional Character	6	6.2	2	1.8	3	2.4
		Nutrition Claim	29	29.9	44	38.6	46	37.1
		Premium	10	10.3	0	.0	0	.0

QSRI Initiative

For Pay TV, there is one pre-initiative time point (Feb 09) and two post-initiative time points (Mar 10 and Jul 10). Since February 2009 the rate of non-core food advertising by signatories showed an initial increase (from 0.12 to 0.36) before a decrease to the lowest point by July 2010 at 0.07 (Table 94). The number of non-core food advertisements was lowest in July 2010, and the proportion of advertisements for non-core foods was slightly lower than February 2009 (Table 95).

Examination of the data on the proportion of advertisements using persuasive marketing techniques to advertise non-core and core foods revealed low cell numbers (see Table 96). Therefore, comparisons between signatories and non signatories, or techniques used to advertise core versus healthy alternatives, and conclusions regarding trends over time are not appropriate.

Table 94 Frequency of food advertisements (ads/hr) by food category (non-core, healthy alternative, non-specific and total) for companies that were signatories to the QSRI initiative at October 2009 for Adelaide Pay TV across time points between Feb 2009 and July 2010.

		Pay TV		
		Feb-09	Mar-10	Jul-10
Not Signatory	Non-core	0.01	0.01	0.00
	Healthy alt	0.00	0.03	0.00
	Non-specific	0.01	0.02	0.03
	Total	0.02	0.05	0.03
Signatory at Oct 2009	Non-core	0.12	0.36	0.07
	Healthy alt	0.18	0.03	0.16
	Non-specific	0.08	0.34	0.02
	Total	0.37	0.73	0.24

Divided by 320 for all days and channels

Table 95 Total number and proportion of food advertisements by food category over time for companies that were signatories at October 2009 Total number (n) and proportion (%) of total food advertisements by food category (non-core, healthy alternative, non-specific and total) for companies that were signatories to the QSRI initiative at October 2009 for Adelaide Pay TV across time points between Feb 2009 and July 2010.

		Pay TV					
		Feb-09		Mar-10		Jul-10	
		n	%	n	%	n	%
Not Signatory	Non-core	3	42.9	2	11.8	1	9.1
	Healthy alt	0	.0	8	47.1	0	.0
	Non-specific	4	57.1	7	41.2	10	90.9
	Total	7	100.0	17	100.0	11	100.0
Signatory at Oct 2009	Non-core	39	32.8	116	50.0	21	26.9
	Healthy alt	56	47.1	8	3.4	52	66.7
	Non-specific	24	20.2	108	46.6	5	6.4
	Total	119	100.0	232	100.0	78	100.0

Table 96 Total number (n) and proportion (%) of advertisements using persuasive marketing techniques (promotional character, nutrition claim, and premium) by food category (non-core, healthy alternative, non-specific and total) for signatories of the QSRI initiative at October 2009 for Adelaide Pay TV across time points between Feb 2009 and July 2010.

			Pay TV					
			Feb-09		*Mar-10*		*Jul-10*	
			n	*%*	*n*	*%*	*n*	*%*
Never Signatory	Non-Core	Nutrition Claim	0	.0	0	.0	0	.0
		Promotional Character	0	.0	0	.0	0	.0
		Premium	0	.0	0	.0	0	.0
	'Healthy' alt	Nutrition Claim	0	.0	0	.0	0	.0
		Promotional Character	0	.0	0	.0	0	.0
		Premium	0	.0	0	.0	0	.0
	Non-Specific	Nutrition Claim	0	.0	0	.0	0	.0
		Promotional Character	0	.0	7	100.0	0	.0
		Premium	2	50.0	0	.0	0	.0
	Total	Nutrition Claim	0	.0	0	.0	0	.0
		Promotional Character	0	.0	7	41.2	0	.0
		Premium	2	28.6	0	.0	0	.0
Signatory at October 2009	Non-Core	Nutrition Claim	0	.0	0	.0	0	.0
		Promotional Character	0	.0	0	.0	12	57.1
		Premium	0	.0	0	.0	0	.0
	'Healthy' alt	Nutrition Claim	0	.0	8	100.0	0	.0
		Promotional Character	0	.0	0	.0	0	.0
		Premium	50	89.3	0	.0	52	100.0
	Non-Specific	Nutrition Claim	0	.0	0	.0	0	.0
		Promotional Character	0	.0	0	.0	0	.0
		Premium	8	57.1	25	100.0	0	.0
	Total	Nutrition Claim	0	.0	8	5.4	0	.0
		Promotional Character	0	.0	0	.0	12	16.0
		Premium	58	59.8	25	16.8	52	69.3

LIMITATIONS

Only one time point prior to the AFGC initiative was included in the dataset. This data was provided by AC Nielsen which meant it had systematic differences to data at other time points (excluding May 2009 which was also provided by AC Nielsen). This limits the extent to which comparisons can be made pre- and post- initiative. Absolute rates post-initiative are likely to vary as a function of the higher number of advertisements in the Commercial Monitors data sets.

Program classification data (e.g., P, C, G) is incomplete as news and current affair programs are not classified. Furthermore, the classification of some programs was not available in television guides. Therefore data regarding program ratings is restricted to a lower number of programs.

The time points compared are not equally spaced and data is collected in different months between years. It is unknown how seasonal variation, the release of new products, public holidays and summer television programming may have influenced the number and type of advertisements captured in the data analysed.

Although this report has presented some data related specifically to children's peak viewing times and popular programs, not all analyses are limited to those related specifically to children. For example, data comparing signatories versus non-signatories largely explores general trends without accounting for advertising that children in particular are exposed to. It would be useful to examine the trends in advertising by signatories and non-signatories during children's peak viewing times specifically.

The companies which are signatories to the initiatives (AFCG and QSRI) represent only a proportion of all the companies advertising on TV. In the case of the QSRI signatories, the 5 companies who have signed represent a majority of fast food advertising (70%). However, the 18 AFCG initiative signatories represent less than half of all the food advertising (40%). This needs to be taken into consideration when comparing absolute frequencies and rates between signatories and non-signatories.

The classification of core and non-core food in this report was done using a clear set of criteria which facilitated coding and analysis of a variety of products (see Appendix B). In the absence of prescriptive definition of 'unhealthy' foods, this system was derived on the basis of work previously done [10]. However there is some subjectivity regarding classification of a minority of products (eg. Yakult as a core food). Varying the way in foods are coded may alter the outcomes and accompanying interpretations. Clearer definition of 'unhealthy' foods in the self-regulatory initiatives would allow more definite comparison of non-core advertising across different analyses in the future.

CONCLUSION

Although food advertising makes up less than 20% of total advertising, more than 50% of food advertising is for non-core foods. Foods from quick service restaurants (‘fast food’) comprise the largest proportion of these non-core foods (between 44 and 90%). Taken together with data showing that children are watching television outside of regulated children’s viewing times and programs that are not targeted at them (e.g., M-rated shows), the high rate of non-core food advertising suggests that children who watch television are going to be exposed to these advertisements.

AFCG Signatories

The impact of non-core food advertising remained consistent since October 2008. This is largely driven by data indicating that number of non-core advertisements has been stable (varying only about 20 advertisements from October 2009 to July 2010) The increase in non-core advertising from October 2008 to July 2010 is an artefact of different datasets (AC Nielsen versus Commercial Monitors) which contained a different number of advertisements overall. Signatories to the AFCG initiative do appear to have a smaller increase in the proportion of non-core food advertisements broadcast since October 2008 compared to non-signatories (a change of approximately x2 versus x3). These companies account for 40% of food advertising (excluding fast foods) which may explain why there has not been much variation in children’s exposure but overall signatories are responsible for a much higher proportion and number of the advertisements for non-core foods than non-signatories (78.3% versus 23.5% and 224 ads vs 100 ads in July 2010). Another explanation is that the current AFCG initiative does not sufficiently apply to the actual viewing habits of children which are largely outside of ‘children viewing times’ extending to 10pm on both weekdays and weekends during 2008 and 2009.

The AFCG initiative focuses on limiting marketing of ‘unhealthy’ foods to children as well as use of promotional techniques during children’s viewing times. The initiatives refer to C- and P-classified programs, some G programs and those where more than 50% of the audience are children.

Results of this report indicate that C-classified programs have very few advertisements and P-classified programs have almost no advertisements. Furthermore, the popular children’s programs included shows with ratings from G to Mature (M) with very few C-classified programs. If the advertisement of non-core foods during C-rated viewing is used as an example, it appears that prior to signing the AFCG, food companies did not advertise a high number non-core foods during C-rated programs (0 to 6 advertisements). Moreover, none of the programs with the highest non-core impact for children were child-specific viewing at any of the time points considered. The highest impact shows were: MasterChef Australia -finale, The Simpsons Movie, Australian Idol, Talkin’ ‘Bout Your Generation, So You Think You Can Dance and the 22nd ARIA Awards.

In regard to the second of these criteria (where more than 50% of the audience is children), there is no timeslot during weekdays or weekends where children comprise more than 50% of the audience. Therefore, is unlikely that outside of C, G and P-rated programs there is any point where more than 50% of the audience is children making the relevance of this aspect of the regulation questionable for Adelaide audiences.

Redefining times and programs which are popular with children in the initiative may increase the efficacy of self-regulation. The peak viewing for times for children are inclusive of a range of times, extending into the 10pm time slot, which is beyond the children's classified programming. It is also clear that children are watching programs which are not targeted specifically at them (sporting events and crime programs such as NCIS). These points need consideration if self-regulation is likely to target and alter children's exposure.

QSRI Signatories

The signatories to the AANA QSRI initiative are amongst the top advertisers on Adelaide television. There are clear differences between the use of advertising techniques between signatories and non-signatories. However, these differences existed prior to the signing of the initiative. It is unclear whether signatories may have already had internal policies regarding marketing to children.

Regardless of self-regulatory status, there has been a consistent rise in the rate of fast food advertising from October 2009 to July 2010 (1.34ads/h to 1.56ads/h). The current data indicates that this increase has not occurred during C-classified programs (where advertising rates are very low) but in programs classified as G or 'other'. It is unclear how much of this increase involves marketing specifically targeting children. However, the advertising of 'fast foods' is a significant part of all non-core food advertisements. Furthermore, from 54 to 94% of fast food advertisements depict non-core options in Adelaide FTA. Therefore any changes in advertising of fast foods are likely to impact children's overall exposure to non-core advertising.

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APPENDIX A - LIST OF SIGNATORIES

Australian Food and Grocery Council Responsible Children's Marketing Initiative Signatories

Signatories at January 2009	*Signatories by May 2009*	*Signatories by March 2010*
Campbell Arnott's	Ferrero	General Mills
Cadbury	Fonterra	National Foods Limited
Coca-Cola	Kellogg	
CPW	Sanitarium	
George Weston & AB F&B	Simplot	
Kraft		
Mars		
Nestle		
Patties Foods Ltd		
Pepsico		
Unilever		

Australian Quick Service Restaurant Industry Initiative For Responsible Advertising And Marketing To Children Signatories

Signatories at August 2009

Chicken Treat

Hungry Jack's

KFC

McDonald's

Oporto

Pizza Hut

Red Rooster

APPENDIX B – FOOD CATEGORY CODES AND SUBCODES

FOOD CATEGORY	CODE
Core and healthy food categories	**1**
Breads, crispbreads (include high fibre, low fat crackers), rice, pasta and noodles	1
Low sugar and high fibre breakfast cereals (<25g sugar/100g *and* ≥5g dietary fibre/100g)	2
Fruits and fruit products without added sugar	3
Vegetables and vegetable products without added sugar (such as …)	4
Plain and flavoured milks, plain and fruit yoghurt, custard, dairy desserts (<3g fat/100g), hard cheese and their alternatives (E.g. soy), ricotta and cottages, (including probiotic drinks)	5
Meat and meat alternatives (not crumbed or battered) (includes fish, legumes, eggs and nuts and nut products, including peanut butter and excluding sugar coated or salted nuts)	6
Core foods combined (including frozen meals (<10g fat/serve), soups (<2g fat/100g, excludes dehydrated), sandwiches, mixed salads and low fat savoury sauces (<10g fat/100g; includes pasta simmer sauces)	7
Baby foods (excluding milk formulae)	8
Bottled water (including mineral and soda water)	9
Fruit juice with no added sugar	10
Non-core and unhealthy food categories	**2**
High sugar and/or low fibre breakfast cereals (≥25g sugar/100g *or* <5g dietary fibre/100g)	11
Crumbed or battered meat and meat alternatives (e.g. fish fingers) and high fat frozen meals (≥10g fat/serve)	12
Cakes, muffins, sweet biscuits, high fat savoury biscuits, pies and pastries	13
Snack foods, including chips, savoury crisps, extruded snacks, popcorn, high fat crackers, snack bars, muesli bars, sugar sweetened fruit and vegetable products (such as jelly fruit cups, fruit straps) and sugar coated nuts.	14
Frozen/fried potato products (excluding packet crisps)	15
Dairy desserts (≥3g fat/100g), and high salt cheese, including haloumi and feta and their alternatives	16
Ice cream and iced confection	17
Chocolate and confectionery (including regular and sugar-free chewing gum and sugar)	18
Fast food restaurants/meals (advertising mostly Non-Core foods)	19
Fast food restaurants/meals (advertising mostly 'healthy' alternatives)	20
Fast food restaurants/meals (Non-Specified or Unclear)	21
High fat/sugar/salt spreads (includes yeast extracts, excludes peanut butter), oils, high fat savoury sauces (≥10g fat/100g), meal helpers (including stocks, tomato paste) and soups (≥2g fat/100g tinned and all dehydrated).	22
Sugar sweetened drinks including soft drinks, cordials, electrolyte drinks, fruit drinks and flavour additions (e.g. Milo).	23

Alcohol	24
Miscellaneous	**3**
Vitamin and mineral supplements (Includes formulated meal replacement and VLCD products)	25
Tea and coffee	26
Supermarkets – advertising mostly non-core foods	27
Supermarkets – advertising mostly core foods	28
Supermarkets – non-specified (generic supermarket ads or not clearly for core or non-core)	29
Baby and toddler milk formulae	30

APPENDIX C – PEAK VIEWING TIMES

APPENDIX C – PEAK VIEWING TIMES

Free-To-Air Television Adelaide

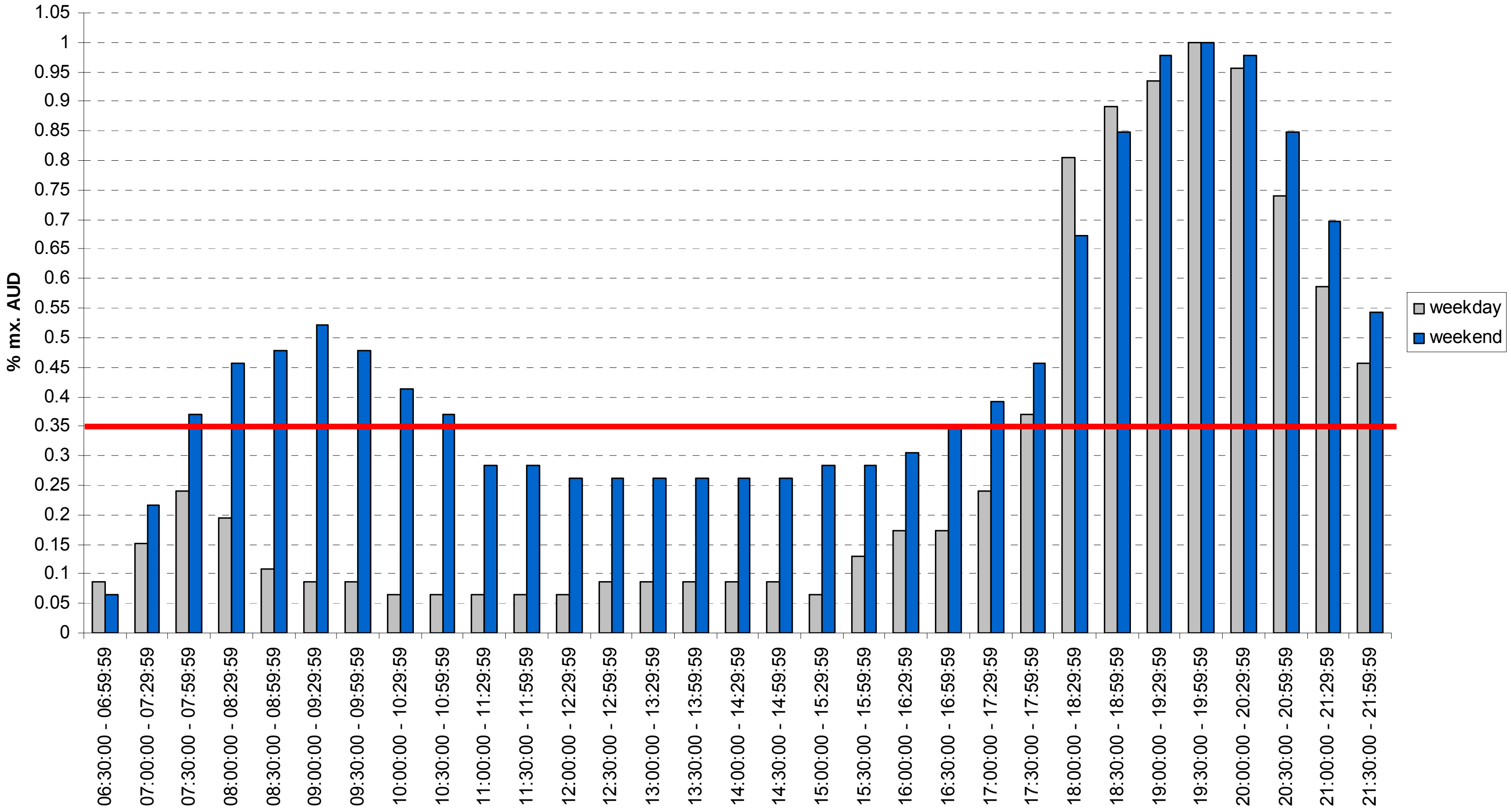


Figure 38 Peak viewing times 2008

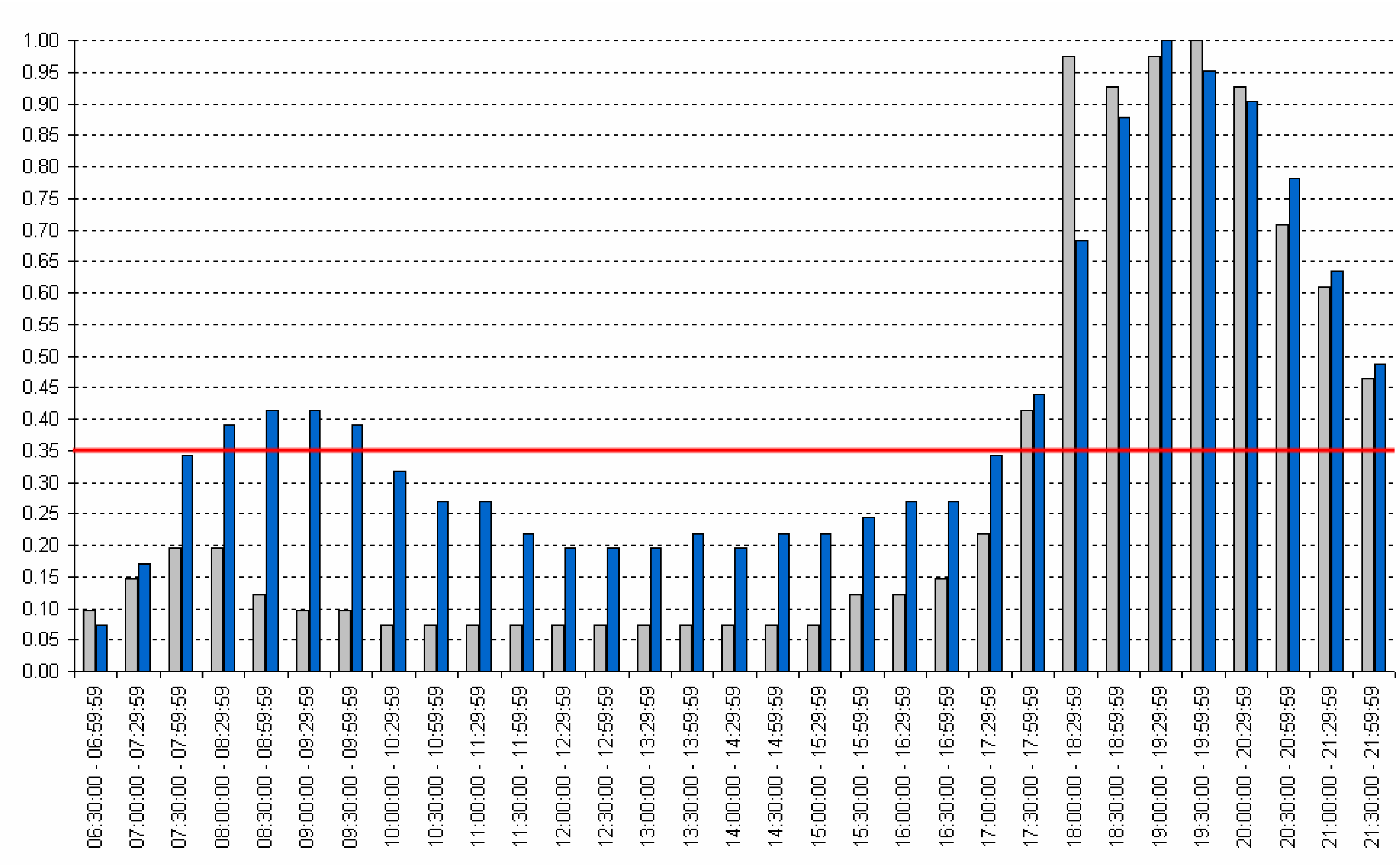


Figure 39 Peak viewing times 2009

Pay Television Adelaide

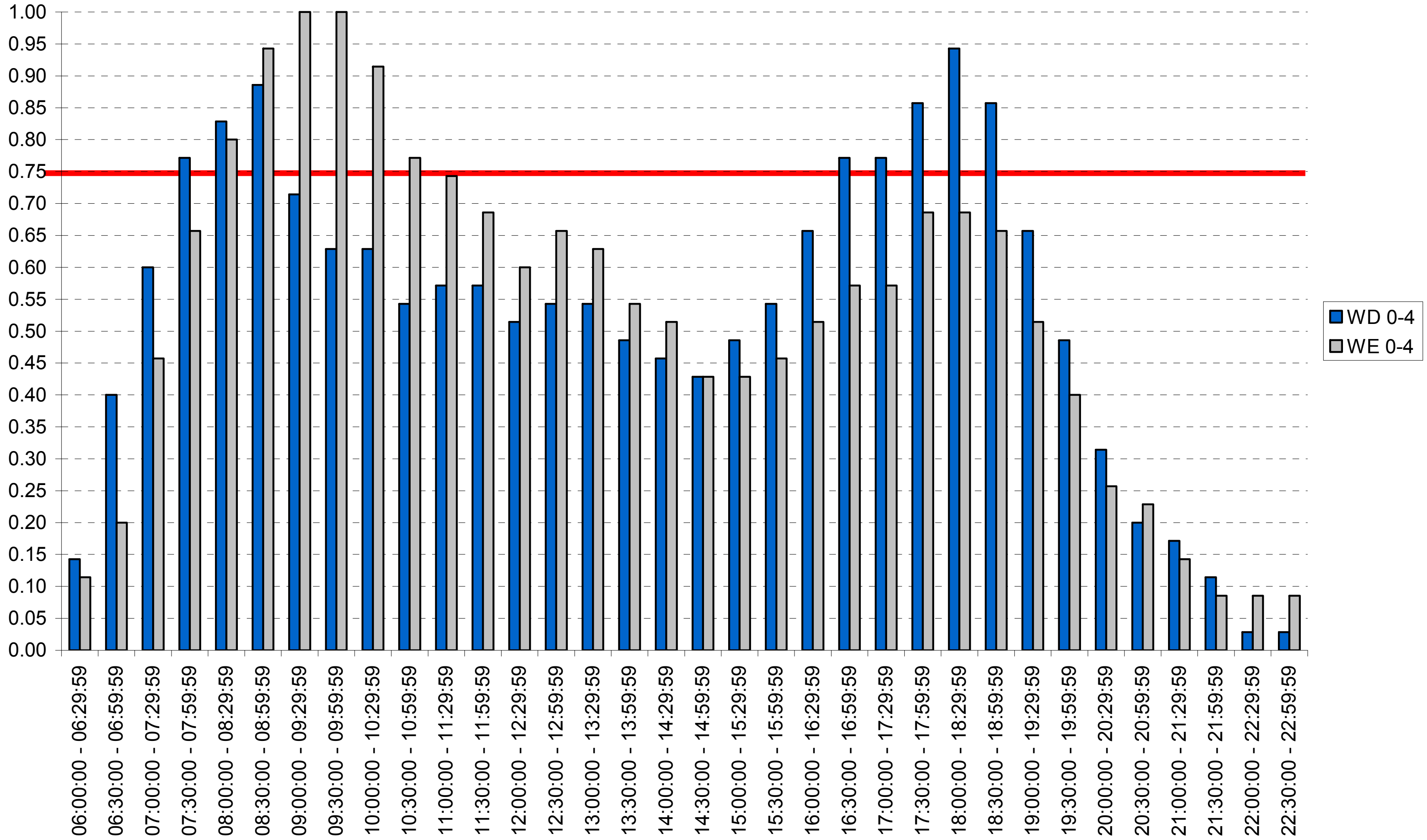


Figure 40: Peak viewing times for Pay TV in 0 to 4 year old children presented for weekdays (WD) and weekends (WE) in Adelaide

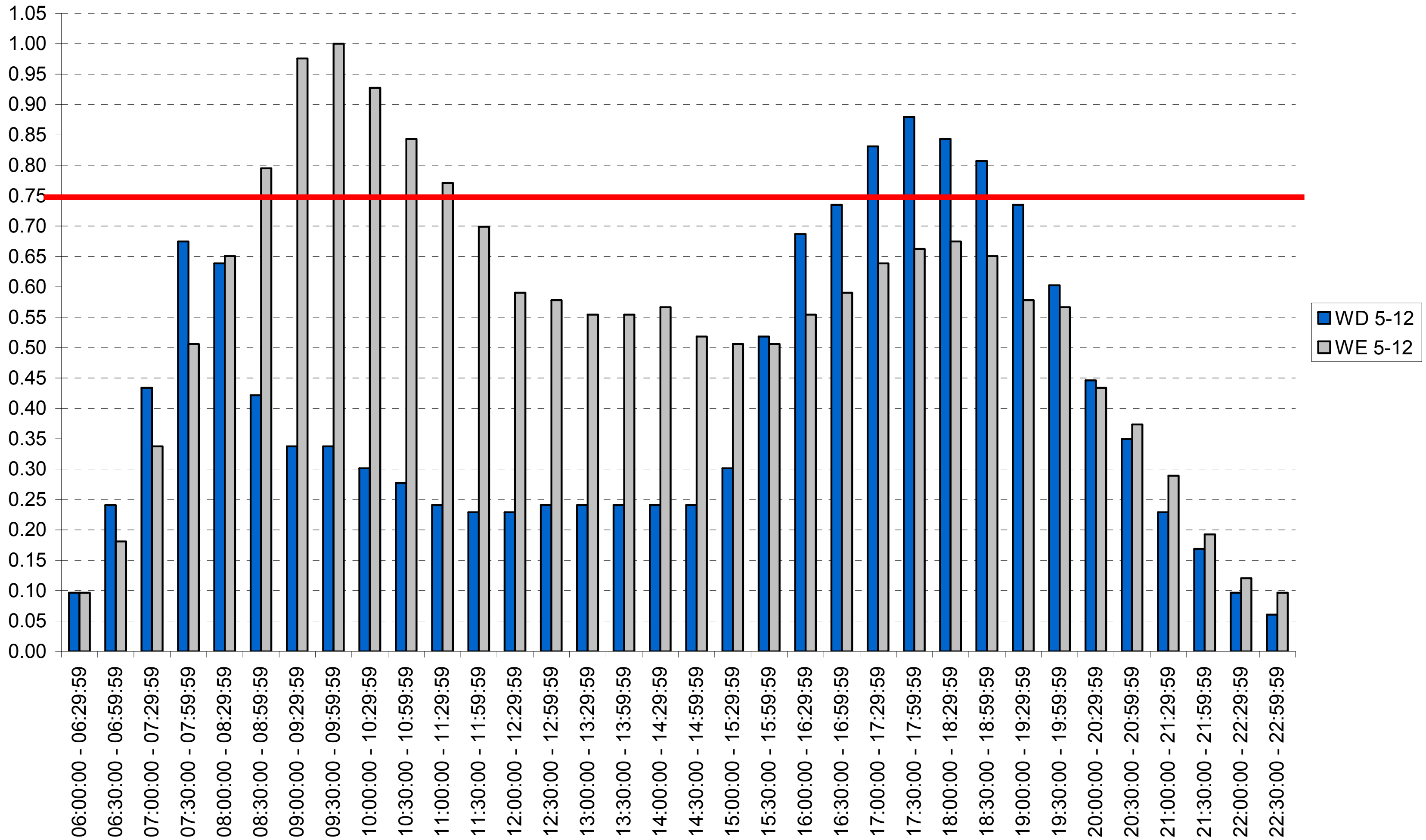
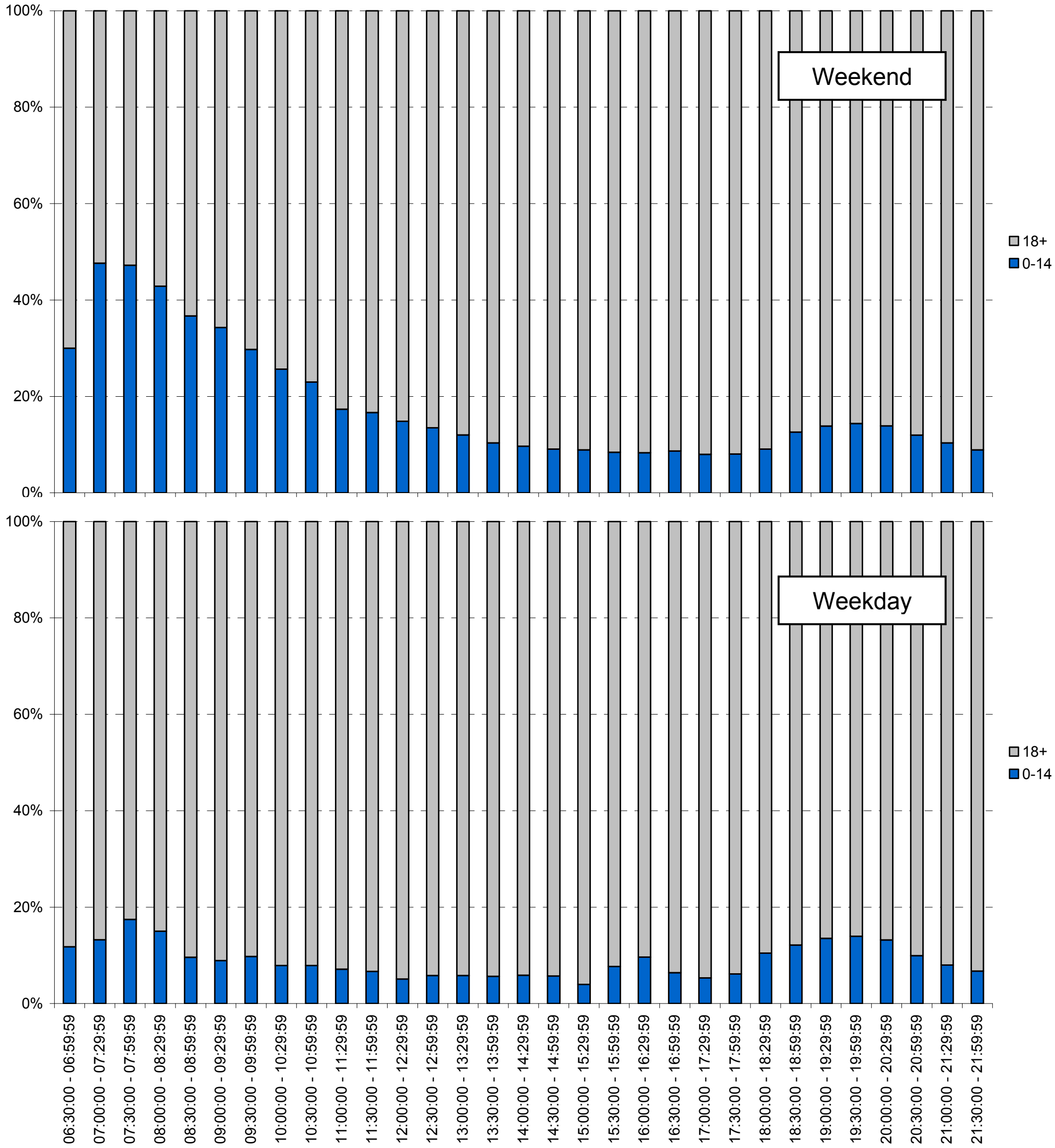
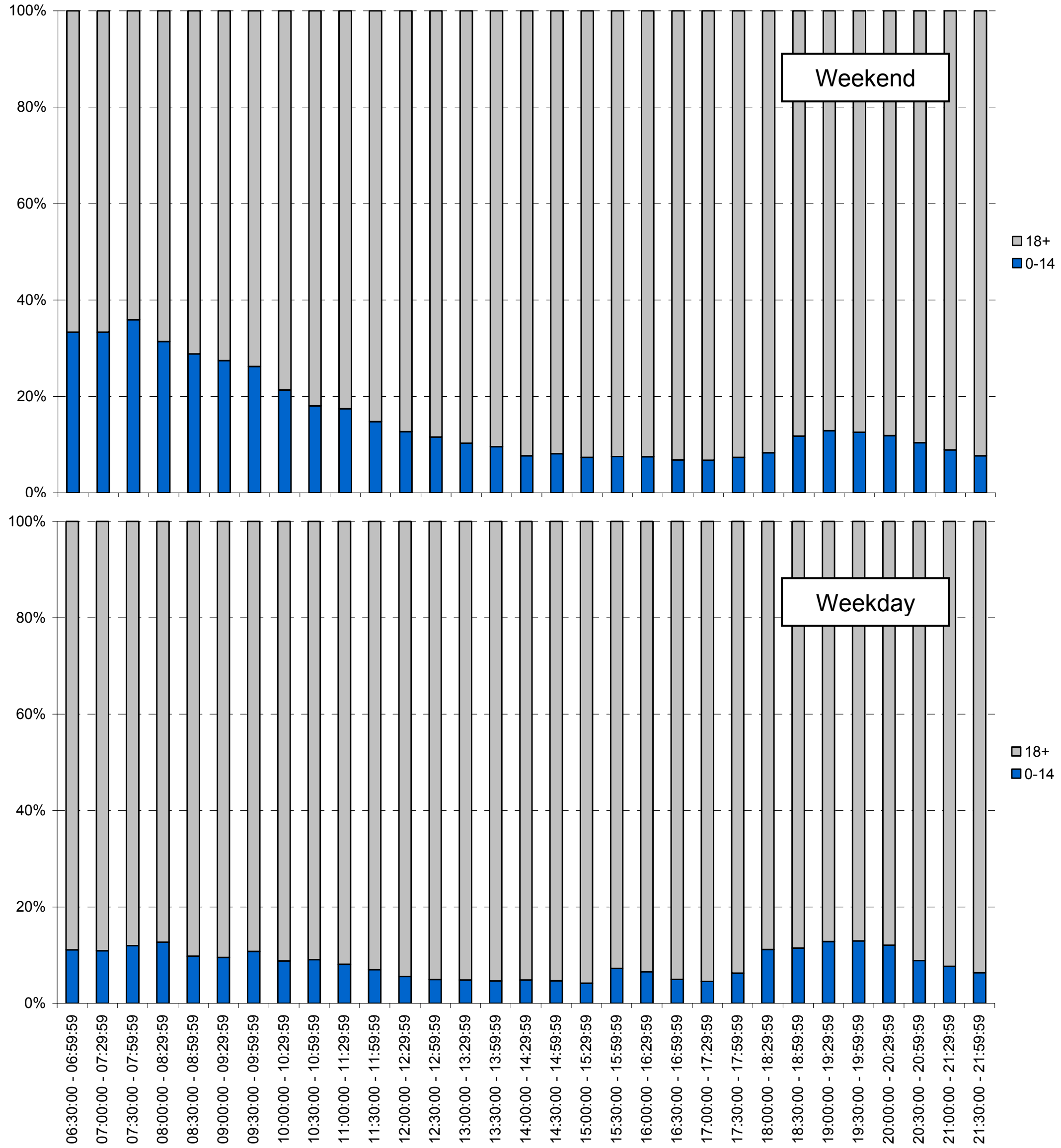


Figure 41: Peak viewing times for Pay TV in 5 to 12 year old children presented for weekdays (WD) and weekends (WE) in Adelaide

APPENDIX D – ADULT AND CHILD AUDIENCE



Proportion of audience of 0-14 year olds compared to those 18 and over for weekends and weekdays in 2008



Proportion of audience of 0-14 year olds compared to those 18 and over for weekends and weekdays in 2009

APPENDIX E - ADDITIONAL CODING RULES

Coding query or discrepancy identified	Coding outcome
Over riding rules (differ from PANORG)	
Coding of IBS support, Inner Health Plus and Yakult (probiotic products) PANORG coded as food – queried by CSIRO	Non-nutritive pharmacological products such as IBS support and Inner Health Plus were recoded as 'non-food' advertisements, however probiotic drinks (in a nutritive liquid) such as Yakult remained coded as 'food' advertisements as per PANORG manual. Additionally, butter menthols and strepsols were coded as non-food as they were advertised as medicinal/pharmacological products
SA Government – Go for 2&5 campaign advertisements. PANORG coded as non-food – queried by CSIRO	Recoded as 'food' advertisements and a 4^{th} sub-code was added to company description 'Government' advertisement (this sub-code will also be inclusive of food industry)
Query by coders regarding coding of Food industry advertisements i.e. Bananas/Meat & Livestock Australia (MLA)	Coded as a 'food' advertisement and new company description sub-code 'food industry'
Coding of Up & Go Liquid Breakfast – PANORG coded as sugar sweetened drink – queried by CSIRO	Recoded as core /flavoured milk as similar nutrient profile to flavoured milk + fibre
Clarifying rules	
Responsible drinking and driving advertisement showing beer brand (XXXX Gold) – questioned by coders (food or non-food)	This advertisement was considered a campaign rather than a product advertisement, therefore coded as NON-food
Fast food restaurants - irregularity in identification	Fast Food restaurants/meals were updated to include quick service restaurants and casual dinning such as Fasta Pasta, coffee club, Danny's Thai bistro, pubs, Café Primo
Restaurant advertisements – query by coders regarding coding of food/NON-food when food was not advertised	If promoting restaurant only (NO food advertised) then considered NON-food advertisements. This was also applied to advertisements by food product brands (i.e. Nescafe ad where no coffee advertised) – coded as NON-food
Restaurant advertisements – query by coders regarding coding of core/NON-core when multiple meals advertised	Used a majority rule approach i.e. if majority of foods/meals promoted were 'core' then coded as 'core' and with relevant sub-category

Fast food restaurants - irregularity in coding coffee advertisements – often coded as miscellaneous/coffee rather than fast food restaurant/unclear	Recoded as fast food restaurant/unclear
Supermarket advertisements - often coded under core or non-core foods depending of food advertised, rather than miscellaneous /supermarket as per manual	Recoded as miscellaneous /supermarket using relevant sub-category (core/non-core/non-specific)
Hamperking (on line shopping for Christmas) confusion on how to code	Advertisement treated as a supermarket hence coding followed the same rules as supermarket advertising (determined by proportion of food to non-food advertising and quality of food advertised)
Salami (processed meat) - confusion on how to code based on coding definitions.	Coded as non-core / 12 (higher fat meat and meat alternatives)
Camembert cheese - confusion on how to code based on coding definitions. Not considered core dairy as high in fat and low in calcium.	Coded as non-core/16 (high salt cheeses)
Non-food advertisements that promote food (i.e. Happy Car Wash – promotes a 6 pack of soft drink) - confusion on how to code	Code as non-food
Weight loss program advertisements (i.e. Weight Watchers, Lite & Easy, Tony Ferguson) - Multiple coding queries. Problematic coding included ambiguity around the promotion of the program versus promotion of specific food, and advertisements that had an unclear emphasis (program, food and meal replacement).	o If the ad referred to food (including images of) i.e. ready-to-eat meals/meal replacement, coded as a ‘food’ advertisement and with relevant sub-category. o If the ad only promoted the program i.e. no real reference to specific food products/meals/nutrition claims, code as Non-food. o If the emphasis is mixed or unclear (i.e. program, food and meal replacement), coded as misc/meal replacements
Promo-character – inconsistent coding of presenter from Brand Power/ Food Focus	Brand Power/Food Focus presenters NOT classified as a promo-character unless they are a famous celebrity/sports person
Promo-character – query by coders regarding M&M characters – are they considered a promo-character	Yes, M&M characters coded as a promo-character
Sponsorship advertisements with multiple sponsorships – confusion on how to code	Used the first food sponsor

APPENDIX F – EXAMPLES OF ADVERTISEMENTS

Creative ID	TAV 2010243388	TAV 2010302818	TAS 2010291309	TAQ 2010282398	TAV 2009362013	N/A	TAS 2009421192	TAV 2009311477	TAV 2010520685	TAS 2009421680	TAS 2009421233
Ad description	Shrek theme adopted - woman goes through McDonalds drive thru and wakes sleeping boyfriend with McDonalds. Celebrate DreamWorks Shrek Forever After at McDonalds with an Ogre Premium Chicken Burger. Also avail as a McValue meal.	Man tries to get a snack out of cupboard but M&Ms throw food at them until he allows them to get into the bowl. Text - Add some colour to your cupboard.	Shrek theme adopted - Enjoy a Happy Meal with a fruit bag - apple slices, chicken mini snack wrap and a new toy.	Offer - Free Continental Cup after purchasing four Cup-A-Soups at IGA or Supa IGA.	Factory workers throw a party for the addition of Cheerios. Cheerios boxes shown coming in on conveyer belt as people celebrate. Uncle Tobys employee says they are welcoming Cheerios to the family. It now has 90% more fibre and Heart Foundation tick.	http://ais.nielsenmedia.com.au/AISReporter/Home/Show.aspx?data=WUm9DdHbV5L9TGnDh2J%2fFcLQlk%2fv%2bXV7Rocyj1BiV2DvzXEydOA4CA%3d%3d	3 men walk past another man, who stares at them as they walk into Hungry Jacks. He has to wheel them each in as they have all been stunned. Cheeseburger stunner deals available with triple, double or single cheesburger for $4.95.	Socceroos are playing and win free-kick. As Tim Cahill lines it up, opposition taunts him by song that he wont score. But kids choir sings that Cahill has one important thing on his side. Cahill scores and says it is because he is a Weet-Bix kid.	Little boy shown swimming and bulking up at beach. As he gets older, hes able to swim better due to his strength, culminating in eventual iron man victory. VO - NutriGrain is one of the highest protein cereals, and is crucial to a balanced diet.	Father surprises son by picking him up for school. Song describes features of Kinder Surprise. Boy then eats Kinder Surprise and plays with helicopter toy. VO - Kinder Surprise has a creamy, milky taste made especially for kids. 80 new toys now available.	The Taste of Paradise - Woman shown relaxing on deserted island and in sea surrounding it. She then takes bite of Bounty, and man emerges to give her a foot rub.
Ad dur	30	15	30	15	30	15	30	30	30	30	30
Time	07:14:23	21:53:57	06:10:16	09:52:34	07:42:15	8:39:18	16:16:00	18:09:30	21:51:21	21:03:15	10:17:15
Program	Weekend Sunrise	NCIS	Teenage Mutant Ninja Turtles	The Morning Show	Sunrise	Saturday Disney	Huey's Cooking Adventures	The Simpsons	Dancing with The Stars	NCIS	Video Hits
Rating	G	M	G	PG	G	G	G	G	G	M	PG
Channel	SEVEN	TEN	TEN	SEVEN	SEVEN	SEVEN	TEN	TEN	SEVEN	TEN	TEN
Weekend?	Y	N	Y	N	Y	Y	N	N	N	N	Y
Product	Ogre Premium Chicken Burger & Value Meal	M&Ms unspecified	Happy Meal Shrek Promotion	Continental Cup-a-Soup unspecified	Cheerios	Yakult Aust.	Hungry Jacks Stunner Deals	Weetbix	Nutrigrain	Kinder Surprise	Bounty
Company	McDonald's Corp	Mars Incorporated	McDonald's Corp	Unilever	CPW	Yakult	Hungry Jacks	Sanitarium	Kellogg's	Ferrero	Mars Incorporated
NC?	N	N	N	N	Y	Y	N	N	Y	N	N
PC?	Y	Y	Y	N	N	N	N	Y	N	N	N
PO?	N	N	Y	Y	N	N	N	N	N	Y	N
Core?	N	N	N- Healthy Alt	N	Y	Y	N	Y	N	N	N

*The Smiths brand was owned by PepsiCo in this time period. NB: NC = Nutrition Claim; PC = Promotional Character; PO = Premium Offer

Contact Us

Phone: 1300 363 400
+61 3 9545 2176

Email: enquiries@csiro.au

Web: www.csiro.au

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