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Marketing to Kids – Baseline Survey and Focus Groups on Recall of Food and Beverage Marketing Executive Summary

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Prepared for Health Canada

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Executive Summary

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This public opinion research report presents the results of an online survey conducted by The Strategic Counsel on behalf of Health Canada. The research study was conducted with 3,000 Canadian parents in March 2019.

Cette publication est aussi disponible en français sous le titre: La publicité destinée aux enfants : enquête de référence et groupes de discussion sur le souvenir de la publicité d'aliments et de boissons

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I. Executive Summary



Executive Summary

Evidence shows that, during their formative years, children are highly susceptible to marketing efforts. Research also shows that lifelong dietary habits are established during the early childhood years and that, despite many parents' interest and efforts in developing healthy eating habits, children (especially those over age six) wield a considerable amount of influence and purchasing power. In the food and beverage sector, aggressive marketing of products that are high in salt, fat, or sugar has been identified as a major contributor to trends showing an increase in the rate of overweight and obesity among Canadian children.

This research study was designed to provide Health Canada with further insights on the issue of food and beverage marketing to children from the perspective of both parents and children, by assessing:

- Children's and parents' awareness of advertising, including whether parents think their children have seen advertisements for certain foods, and if so, where and for which categories of foods.
- Children's interest in and desire for advertised foods, based on parents' response to questions about the extent and nature of requests for certain foods made by their children, otherwise known as Pester Power.¹
- How parents respond to food requests (action), particularly whether their food purchasing is influenced by children's requests for certain foods, and if so, for what foods.
- Parents' concern over advertising of certain foods and whether the level of concern is trending up or down.

A. Overview of Methodology

A two-phased approach was implemented to address the above-noted research objectives, utilizing both quantitative and qualitative methodologies. In the first phase, an online survey was conducted among parents in households where at least one children was between the ages of 2 and 12 years. The survey was in field between March 8th and 20th, 2019 yielding a total sample of 3,000 respondents. Following completion of the survey, a series of eight focus groups were held, four in Toronto and four in Montreal (in French), on April 27, 2019. In each center, two focus groups were held with parents while, simultaneously, two focus groups were also held with children. The groups with children were segmented by age and grade level (6-8 years and 9-12 years). These discussions provided an opportunity to further explore and elaborate on the survey. Results from the survey are reported on in Section II, while the qualitative findings are covered in Section III.

Additional details on the methodology can be found in Section IV of the full report.

¹ Pester Power is a phenomenon which is described as the tendency of children who are inundated with marketing messages to request advertised items in an unrelenting fashion. The phrase is associated with the negative connotations of children's influence on their parents' buying habits.



B. Key Findings

Parents are concerned about food and beverage marketing to children, but feel somewhat powerless in an era of hyper commercialization and heavy consumerism, and in the face of ubiquitous marketing to children, many of whom are online at an early age.

- Most parents (67%) are at least modestly, if not strongly, concerned about their child's exposure to food and beverage marketing (48% somewhat concerned; 19% very concerned). Similar numbers agree that their children are exposed to too much food and beverage advertising (65%) and specifically that much of the advertising is focused on products that are unhealthy for children.
- While parents feel a sense of responsibility to protect their children, they also find it challenging. 65% say it's difficult for parents to monitor and control the food and beverage advertising to which their children are exposed and 53% agree that advertising of foods and beverages makes it more difficult for parents to raise healthy children. In focus groups, the majority of parents, including those who initially exhibited less concern about this issue, felt overwhelmed and challenged by the pervasive nature of marketing. Many simply don't know what they can do to mitigate or counter its impact on their children.

Some parents are also of the view that, relative to when they were growing up, marketing aimed at children today is more pervasive but also more subtle. This is a reflection of the increasingly integrated marketing communications strategies utilized by food and beverage companies. The embedded nature of the marketing (i.e., tie-ins or promotions with movies and online games, product placements, etc.) makes it 'feel' less invasive or intrusive. It is seen as a more natural and accepted extension of the child's activity.

- In focus groups parents commented that they believe their children are less exposed to what they describe as 'random' marketing than they were at the same age. What has changed is how and what children are viewing. Specifically, children today are not 'appointment viewing' in the same way that their parents were and, as a result, their view is that they are not bombarded with unrelated or irrelevant advertising and marketing.
- Parents do, however, acknowledge that exposure is more pervasive online. But, the advertising is typically accepted as integral to the activity the child is undertaking online. While parents believe their children are vulnerable, their comments also suggest a sense of helplessness and perhaps some degree of desensitization (both parents and children) to the current volume and impact of marketing.
- At the same time, after completing the survey or participating in a 90-minute discussion on the topic, we did note an uptick in expressed concern as parents become more aware of the many, mostly non-traditional, ways in which food and beverage companies now market their products to children.

Parents believe that children are highly 'brand aware,' and particularly so for specific brands within the fast-food, cookie and cereal categories.

- Parents say their children are readily able to identify many brands across various food and beverage categories. Survey responses show that recognition rates do vary across categories – highest for McDonald's, but also reasonably strong for products such as Oreo cookies, Cheerios and Froot Loops. Brand recognition within the candy/chocolates category is much lower, although some products (Kit Kat, Smarties and Kinder Eggs) do stand out.
- In focus groups, we noted stronger evidence of widespread brand recognition beginning at an early age. Most parents said their children were familiar with many of the brands tested in the groups, and children themselves confirmed this.



Brand awareness appears to begin at a young age, and develops rapidly.

- While older children are more likely to be familiar with a wider array of brands across categories, parents of younger children also indicate they demonstrate fairly high levels of brand awareness.
- Survey findings indicate that many children have access to many devices which would increase their exposure, in particular to online marketing. Access to devices such as iPads, tablets, video game consoles, portable music devices and cell phones with data plans tends to be higher in households with older children, aged 7 to 12. However, in some cases, a quarter of households with children aged 2 to 6 only also indicated their children had access to a number of these devices.

Parents are of the view that children are attracted to a combination of elements in terms of logo and package design, particularly anthropomorphic characters, play elements, playful font style, and colourful design.

- Cartoon-style characters with anthropomorphic features, playful aspects (i.e., something on the packaging which suggests playful ways in which the product can be consumed such as dipping crackers, etc.), and colourful package design. Each of these elements works effectively on its own, but they are most powerful when applied in combination.
- Animated characters incorporating attributes associated with youthfulness, more so than human figures. Characters or imagery reflecting an older demographic (Aunt Jemima or Paul Newman) are automatically viewed as targeting an adult audience.
- Expressive characters, exuding a friendly, welcoming style or tone (i.e., wide eyes, bright smiles).
- A bright colour palette, typically employing a range of primary colours (red, yellow and blue) and in particular, use of rainbow colouring signals quite clearly to children that the product is intended for them.
- Packaging which illustrates the product itself and gives them a sense of what it might taste like (i.e., a half-eaten cookie). While other design elements might be lacking on these packages, children are understandably drawn to products that look delicious and illustrate recognizable ingredients which they associate with a pleasurable or fun eating experience (i.e., chocolate, marshmallow filling, etc.).

Parents feel that their children are highly susceptible to many of the standard marketing tactics employed by food and beverage companies, including collectibles, tie-ins and promotional activities associated with movies and child-specific menu items.

- Any type of packaging which in itself incorporates a play element or some type of collectible toy, as is often the case in beverage and popcorn containers at movie concessions as well as in many fast-food outlets, has strong appeal among children.
- Tie-ins with movies and certain movie characters are highly effective marketing tools. Collectibles in particular are keenly desired by children and acknowledged by both parents and children alike as an important part of the movie experience.

Children are exposed to food and beverage advertising across a wide range of media – traditional, in-location, and online – although the format varies to some extent by the age of the child.

- TV and in-store exposure are the most prevalent ways in which children are exposed to food and beverage marketing, according to their parents, along with fast-food or take-out restaurants.
- The power of the Internet, particularly YouTube, as a marketing channel is also quite evident. Although falling outside the top 5 marketing tactics identified by respondents to the survey, the influence of online activity, and YouTube specifically, was evident in comments by both parents and children in focus groups. In the survey, a slightly higher percentage of parents identified YouTube as having a great deal or a lot of



influence on their children when it comes to food and beverage marketing compared to the proportion citing the Internet in general (46% versus 38% respectively), although there is likely a bit of overlap between these two categories. The impact of YouTube was also clear from results on a question about children's media habits. Even in households with children aged 2 to 6 years only, almost one-third of parents indicated that their children were spending at least one hour a day on YouTube. This percentage increases in households with children spanning the younger and older age groups (38%) and is higher still for those households with children in the older age group, aged 7 to 12 only (46%).

- In general, parents with older children only in their household are more likely to report exposure of their children to food and beverage marketing via the Internet, movie theatres, vending machines, social media, radio and online games, compared to those in households with younger children only.

In general, parents are somewhat reluctant to admit that food and beverage advertising affects the choices of products they buy, although it is evident from this study that a high degree of Pester Power is in play. This links to the earlier finding that parents are unsure of exactly what they can do to minimize or counter aggressive marketing tactics.

- Ultimately, parents see themselves as the final arbiter of what their children eat. While many parents (79%) agree that advertising by the food and beverage industry affects the choices or requests that children make, vastly fewer (58%) agree that it influences what parents buy. This 21-point gap suggests that parents may be downplaying or understating the extent to which they do give in to children's requests for specific foods and beverages based on marketing to which they have been exposed.
- This phenomenon was more clearly evident in the focus groups where parents stressed their role as 'gatekeepers,' but also clearly identified logos, foods and product packaging which their children would readily recognize and which they acknowledged having purchased, often under some pressure.

Consistent with other research on this topic, respondents from Quebec were less likely to express concerns about the exposure of their children to food and beverage marketing.

- The province of Quebec has had legislation in place since the early 1980s to protect children from advertising. Under Quebec law companies are not permitted to advertise to children under age 13. Data from this survey shows the legislation has had some impact in that Francophone parents are generally less concerned about food and beverage marketing to their children and indicate their children are less exposed to it. Over 40 percent of Francophone respondents fall into the 'low exposure' category.
- Similarly, Pester Power is felt less by Francophone parents who were less likely to say their children requested products and, even when they did, these parents were less likely to purchase them.
- At the same time, the one area where they do feel their children are more exposed is via in-store displays. This makes sense given the efforts to restrict TV advertising do not extend to restrictions on packaging or to other marketing tools and tactics which are becoming more effectively utilized by companies and increasingly integrated into their marketing strategies.



C. Conclusions

Combined, the survey results and findings from the focus groups underscore wide and pervasive exposure of children in the 2 to 12 age range to food and beverage marketing. While TV remains a key channel, children are also exposed via in-store displays and product packaging, in addition to a plethora of online marketing techniques which may appear as pop-ups but are often now increasingly central to or indistinguishable from the online activities in which the children are engaged.

As a result, while parents express some concern about this issue, and more so once they have completed a survey or participated in a two-hour discussion on the topic, they lack a strong sense of agency to address the issue. In some respects they also feel that their own food and beverage preferences, and purchasing patterns, may be contributing to increased brand recognition and affinity by their children.

Survey results show clear evidence of Pester Power and the extent to which parents acquiesce, although they do their utmost to make wise choices when it comes to their children's diets. In many respects, parents feel quite helpless against the tide of advertising and marketing. And, many parents who express some concern are unsure what can be done to adequately address this issue.

MORE INFORMATION

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Signed:

Donna Nixon, Partner