# WFA: Study on online HFSS Food Ad Exposure

A Nielsen Ad Intel Insight Report

What is the Digital Avatar Project?

The following insight report is based upon the findings of our Digital Avatar project, which used four avatars (simulated consumer profiles) to track advertising activity across a media universe of 100 distinct URLs (websites/YouTube) in 12 nominated markets. Through the findings, we were able to determine the general pervasiveness of HFSS Food advertising. We were also able to estimate a probabilistic rate of child exposure to HFSS advertising.

The study employed four simulated consumer profiles, also known as avatars: **Child Under 12, Teenager 12-17, Adult** and **Neutral**
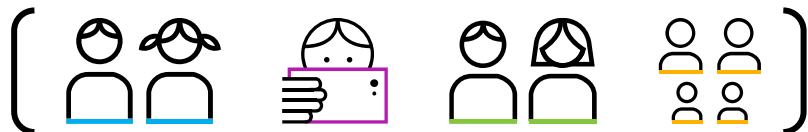
Each of the four avatars visited **100 primary URLs per market** across both desktop and mobile devices, with a randomly selected subpage also monitored.

This created **1,600 hits a day per country**. We ran the avatars for **21 days between 7th – 27th Oct 2021**, resulting in a total of **33,600 hits per country, for a total of 403,200**.

The media universe was formulated as a mix of sites & channels popular with – and having content/genre affinity with – teen and children audiences, as well as generally top ranking sites & channels, to achieve a simulation of the average browsing habits in each country.

Identifying HFSS ads

Using a combination of OFCOM and DOH guidelines, Nielsen identified the below categories that to various degrees contain "HFSS products". Because of limited data availability on the nutritional composition of the advertised products, Nielsen used these categories as a proxy for defining HFSS products:

HFSS Categories					
Breakfast Cereal	Chips & Potato Products	Fast Food	Morning Goods	Pudding & Dairy Desserts	Sweet Biscuits
Butters & Spreads	Chocolate Confectionary	Ice Cream	Nuts	Soft Drinks	Yoghurts
Cakes	Complete Main Meals (Ready Meals)	Juice Drinks	Pizza	Stocks / Sauces / Dips	
Cheese	Crisps & Savoury Snacks	Milk Drinks	Processed Foods	Sugar Confectionary	

The classification of some of these categories as HFSS can certainly be questioned, such as breakfast cereal, yoghurts, ready meals and juice drinks, since many such products do meet OfCom criteria. This resulted in an over-representation of HFSS products vis-à-vis the Ofcom model. The findings of this study therefore reflect the *maximum possible amount* of HFSS advertising in market.

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Summary Tables

Ads seen by CHILD AVATAR ONLY

	% of ads that are HFSS
	2021
Global	**1.45%**
EU	**1.53%**

Ads seen by CHILD AVATAR ONLY by Market

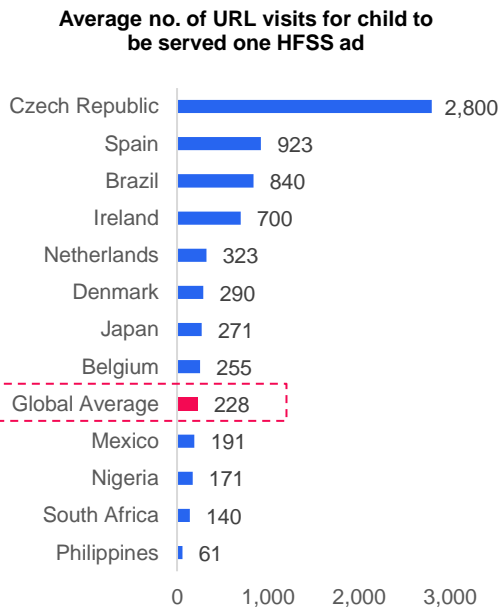|	% of ads that are HFSS		% of ads that are HFSS
	2021		2021
Belgium	**2.42%**	Mexico	**1.23%**
Brazil	**0.29%**	Netherlands	**1.07%**
Czech Republic	**0.21%**	Nigeria	**1.42%**
Denmark	**1.62%**	Philippines	**4.23%**
Ireland	**0.65%**	South Africa	**2.24%**
Japan	**1.02%**	Spain	**0.39%**

Our **Child Avatar** visited **100,800** URLs over 21 days and was served **30,593** ads. Of which, **443** (1.45%) were considered HFSS food and drinks

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On average, the child avatar was served only one HFSS ad per 228 URLs visited

By calculating the average number of impressions served per site visit, we can determine the average number of site visits that the child avatars would have to make to encounter one HFSS ad.

	No. of all Ad Impressions	No. of HFSS Ad Impressions	No. of Ad Impressions per single HFSS Ad Impression	Total No. of URL Visits by Child Avatar	Avg. No. of Ad Impressions per URL visit	Avg. No. of site visits needed to be served one HFSS ads
Belgium	1,365	33	41	8,400	0.16	255
Brazil	3,435	10	344	8,400	0.41	840
Czech Republic	1,437	3	479	8,400	0.17	2,800
Denmark	1,787	29	62	8,400	0.21	290
Ireland	1,854	12	155	8,400	0.22	700
Japan	3,030	31	98	8,400	0.36	271
Mexico	3,575	44	81	8,400	0.43	191
Netherlands	2,434	26	94	8,400	0.29	323
Nigeria	3,449	49	70	8,400	0.41	171
Philippines	3,235	137	24	8,400	0.39	61
South Africa	2,675	60	45	8,400	0.32	140
Spain	2,317	9	257	8,400	0.28	933
All Markets	**30,593**	**443**	**69**	**100,800**	**0.30**	**228**

Average no. of URL visits for child to be served one HFSS ad

Czech Republic	2,800
Spain	923
Brazil	840
Ireland	700
Netherlands	323
Denmark	290
Japan	271
Belgium	255
Global Average	228
Mexico	191
Nigeria	171
South Africa	140
Philippines	61

0   1,000   2,000   3,000

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N.B: Avg. no of ad impressions calculated as: No. of all Ad Impressions / Total No. of URLs Visited

Globally, we estimate that a child would be served one HFSS ad every 659 minutes, or 10 hours 59 minutes

Using Nielsen data from our Desktop @ Home panels, we are able to calculate an 'average child user' from our audiences. This usage data comes from households in AU / DE / IT / UK / US during the full month of Oct-21 using a desktop PC within the home, and does not include mobile/tablet browsing. Due to a different market scope and timeframe, the Desktop @ Home panel data is not directly comparable with the findings of our Digital Avatar Study. However, by using it to create average values, we can calculate an *estimated overall amount of time* a child would need to spend online to be served one HFSS ad.

Age Range	Panel Size	Page Views	Total Minutes (Mins)
Ages 2-12	17,172	1,874,601	5,431,316

Across 17,172 panellists, the average figures are as follows:

Average per child	1	109	316

Therefore, an average child visits **109 pages** in **316 mins**.

Our data shows that, globally, an average child would see an HFSS ad every **228 pages**. The calculation for average amount of time spent online per one HFSS ad exposure is as follows:

(316 / 109) = 2.89	2.89 mins per page (or 2 mins 53 secs)
2.89 * 228	659 minutes

Globally, on average, a child would see an HFSS ad every **659 minutes**, or **10 hours 59 mins**

No. of Mins online per single HFSS ad served

More Frequent Exposure　　　　*Less Frequent Exposure*