

# Obesity and Marketing Exposure

*for Obesity: The Welfare Regime Hypothesis 27/28 November 09*

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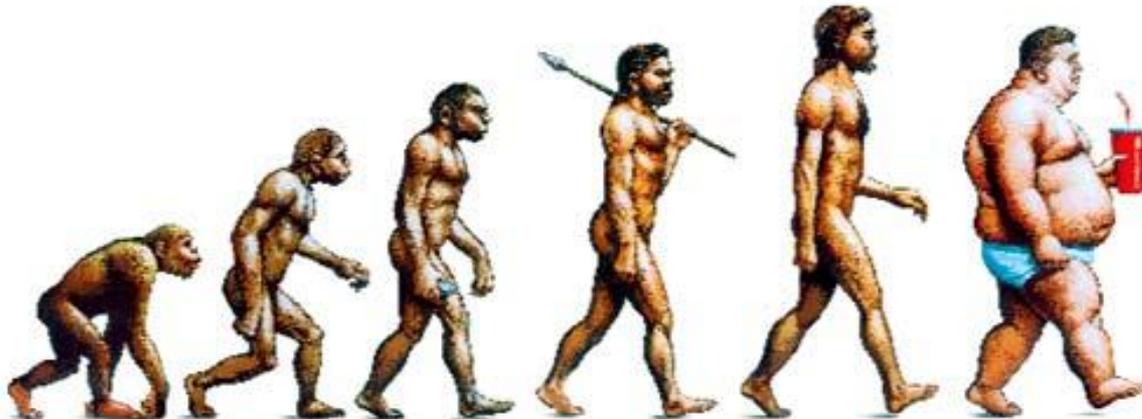


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# Outline

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- The nature of marketing.
- The scale of food marketing.
- The evidence on content and effects of food marketing.
- Evidence gaps.
- Conclusions: future research priorities.



# Marketing is multi-faceted





# The nature of marketing

- Newly emerging paradigms viz. Vargo & Lusch's service-dominant logic argue that the core function of marketing is to facilitate to the co-creation of values/benefits through the integration of internal and external resources\*. *An empirical description of industry 'consumer-led response' business strategy?*
- Marketing is actively engaged in a dynamic, continuously evolving process, characterised by relationship building, information flows resilience, and adaptation. *Linking externalities and internalities? Locus of responsibility for unintended consequences ?*
- This model reframes the marketing function from normative promotion of tangible goods/services to active agency for continuous market - consumer value negotiation. *A model for marketing's effect on consumer culture?*

•For e.g. see Vargo S & Lusch R. Service-dominant logic: continuing the evolution *J Acad Mark Sci* (2008) 361-10

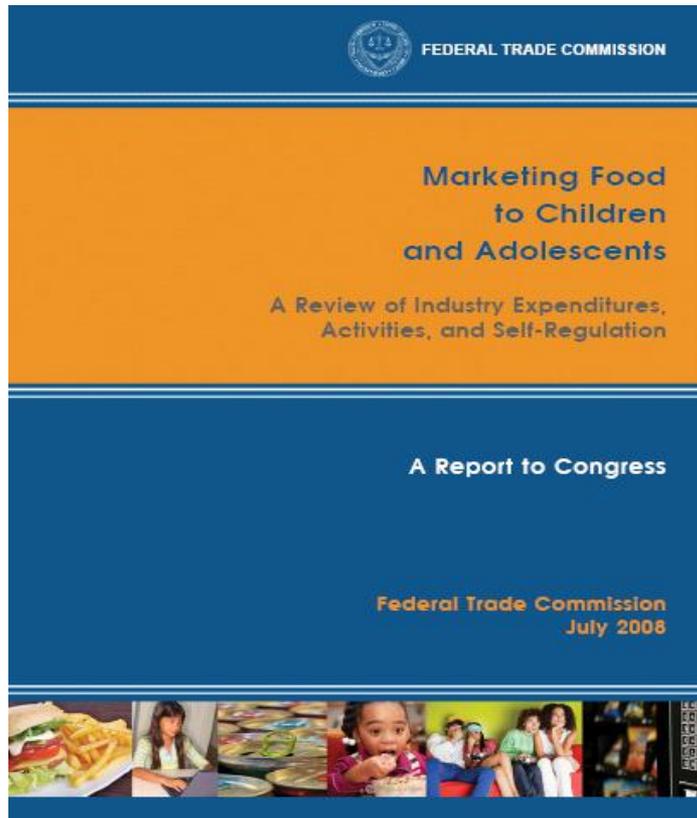
# “Today’s consumers are partners in how brands are conceived and sold”

- Quote from McDonald’s Chief Marketing Officer/EVP, at American Marketing Association's Mplanet 2009 conference
- As an example of user-generated content, this video received 1.86 million views *before* editing and re-releasing as a 30 second online ad

McNuggets Rap - McDonald's commercial



# The scale of food marketing: the US



*young people-mediated access to > 55% market (\$10 bill direct + \$500 bill household purchase)*

Child US\$1.6 billion (all audiences total US\$9.6 billion).

- Traditional advertising 53%
- Digital media 5%
- Premiums 4%
- In-school 11%
- Point of sale (POS) 12%
- Non-POS promotion 15%

*Plus - product 'give-aways' included in purchase = approx 50% expenditure additional to marketing budget*

# The scale of food marketing: the UK

- UK consumer grocery expenditure = £80-90 billion p.a.\*\*
- Advertising : sales ratios range from  $\leq 1\%$  fresh fruit and vegetables; 8.5% carbonated soft drinks, & 20% boxed chocolates\*



\* Source = ASA Statistics Year book 2009

\*\* Source = DEFRA Food Statistics Pocketbook 2008

# Evidence on nature and extent of food marketing

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- Cairns, Angus & Hastings (2008) at:  
<http://www.who.int/dietphysicalactivity/marketing-food-to-children/en/index.html>
- 2008 and 2006 ISM WHO Reviews, 2003 FSA and US McGinnis et al Institute of Medicine 2006 → consensus on extent, nature and effects.
- 115 studies included.
- Studies found 70-90% content for high fat, salt sugar foods, predominantly confectionery, carbonated soft drinks (CSD), quick service restaurant meals (QSR), savoury snacks, pre-sugared breakfast cereals.
- Child and adolescent targeted promotional themes fun, fantasy, novelty, humour, taste.
- Studies find high levels recall and engagement.

# Evidence on effects of food marketing

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- Correlation and observational studies provide qualitative insights on response.
- Additionally 46 studies met inclusion criteria for causality testing.
- TV advertising most common independent variable.
- Effects operate at food category and brand switching level.
- Eight studies examining marketing influence relative to other influences suggest magnitude of marketing effects similar or greater than familial and peer influences.

# Evidence of effects

Outcome measured (number of studies reviewed)	Quality of studies	Strength of evidence
Knowledge (9)	++	++
Preference (18)	++	++
Purchase (8)	++++	++++
Consumption (18)	++	++
Health and nutrition (7)	++	+

# Evidence of effects: summary

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- Modest evidence of marketing direct influence on preference, knowledge, consumption , health outcomes.
- Evidence base for effects on purchase behaviours, the most proximal outcome was strongest.
- Almost no quantifiable evidence for indirect effects, although consensus that this is highly likely.

# Evidence of effects: limitations of reviewed studies

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- Limitations on ecological validity of 30 experimental and quasi-experimental studies.
- Limitations on internal validity of 16 cross-sectional and observational studies.
- Multi-faceted impact of marketing not captured (gaps include retail, point of sale, sponsorship, celebrity endorsement research)
- Indirect effects not captured.
- Many studies were US-based and used TV advertising as the treatment variable.

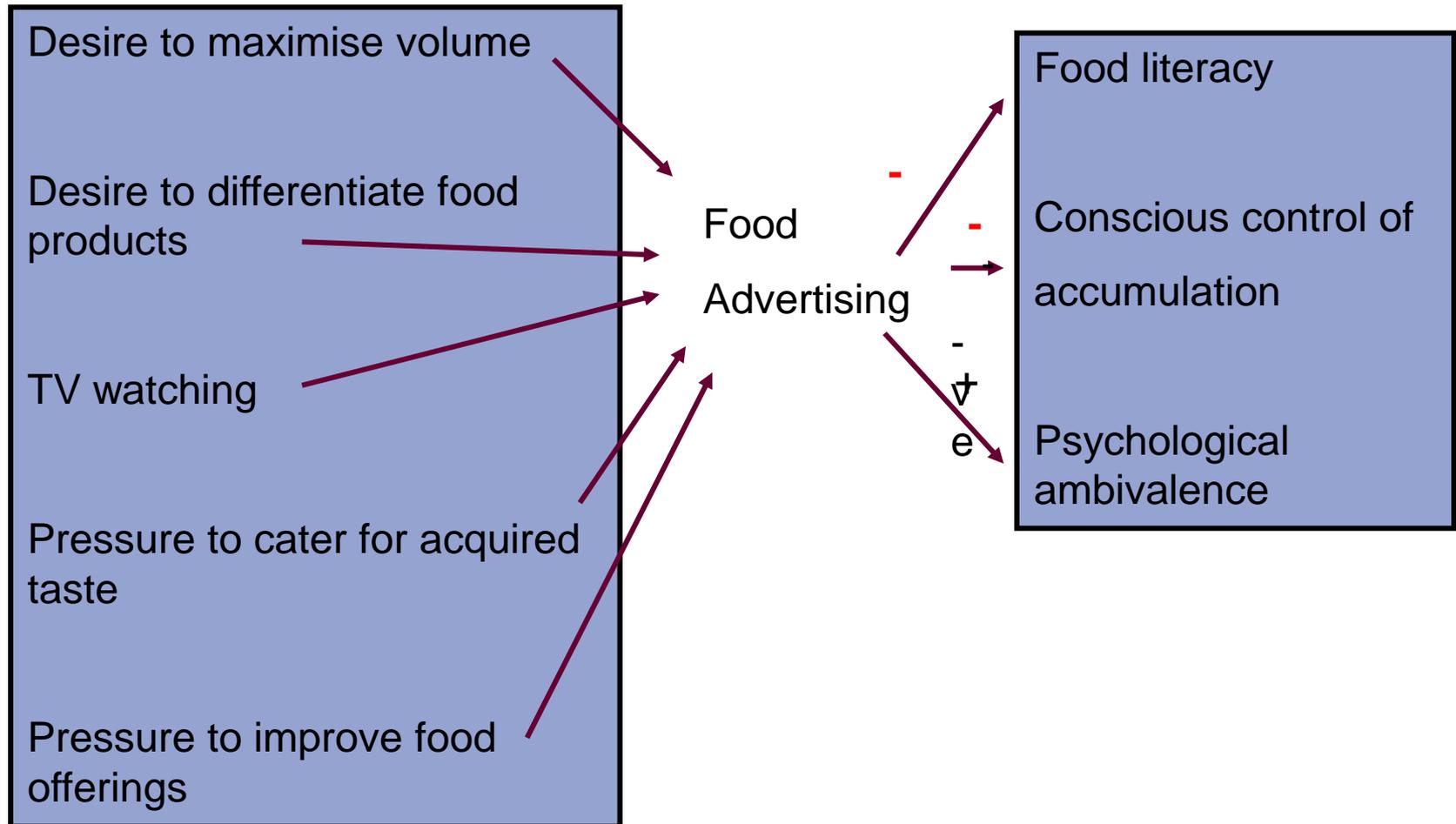
# Obesity, marketing and globalisation.

- Globalised market integration trends mediated via
  - agricultural trade
  - foreign direct investment in food production and retailing
  - Advertising and promotion
  
- Marketing strategies in developing and developed economies same\*\*.
  
- Minimal market intervention policy preference: e.g. WHO is tasked "to promote initiatives aimed at implementing the global strategy with the purpose of increasing availability of healthy food and promoting healthy diets and healthy eating habits and to promote responsible marketing including the development of a set of recommendations on the marketing of foods and non-alcoholic beverages to children, in order to reduce the impact of foods high in saturated fats, trans-fatty acids, free sugars, or salt, in dialogue with all relevant stakeholders, including private sector parties, while ensuring avoidance of potential conflict of interest".

\* Hawkes C (2008) Globalisation and Health 2 (4)1744-8603

\*\* <http://www.who.int/dietphysicalactivity/marketing-food-to-children/en/index.html>

# Marketing in the Foresight obesogenic systems map

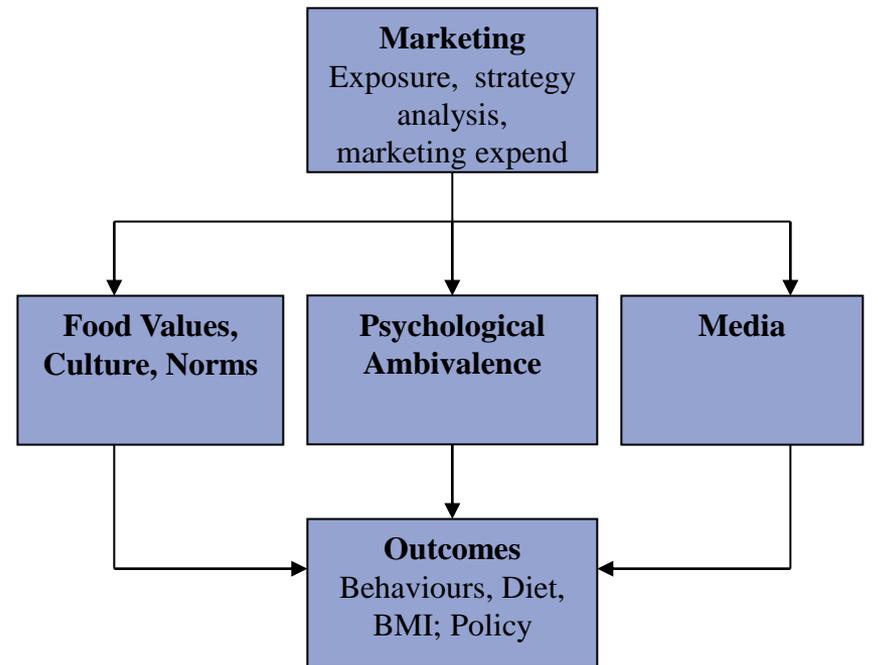




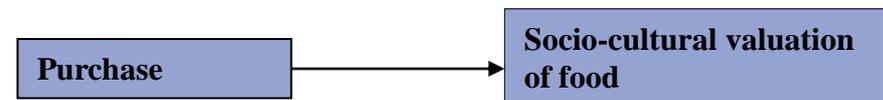
# Conclusions:

## Research Directions for Marketing

- Greater use of practice-based evidence/natural experiments.
- Mediation analysis.
- Validate sales data methodologies as proxy for consumption behaviours.
- Explore effect of marketing on heuristic behaviours and food choices.
- Refocus testing, mapping, and measuring of marketing to include direct as well as indirect effects.
- Examine marketing and media exposure data against culture, and policy data.



**OR**



Thank you for your attention.

Questions ?

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