

PART I		
Title of Assignment	Study on the landscape of digital marketing to children and adolescents and market sizing of foods and non-alcoholic beverages in selected Eastern and Southern African countries to inform policy processes, especially marketing to children restrictions.	
	<input checked="" type="checkbox"/> International	<input type="checkbox"/> National
Hiring Section	Nutrition	
Location	<i>Remote. No travel.</i>	
Duration	12 months	
Start/End date	From: 4/1/2024	To: 3/31/2025

Background and Justification

UNICEF promotes the rights and welfare of all children and adolescents in everything we do. Together with our allies, we work in 190 countries and territories in the world, including 21 in Eastern and Southern Africa (ESAR), to transform this commitment into practical actions that benefit all children, especially focusing our efforts on reaching the most vulnerable and excluded, worldwide.

Childhood overweight and obesity present a global public health challenge, affecting immediate well-being, increasing the risk of non-communicable diseases, and carrying societal and economic consequences. In the ESA region, an estimated 3.6 million children under 5 and nearly 20 million school-age children are estimated to be overweight. The pervasive marketing of unhealthy products, high in saturated fat, salt, and free sugars (HFSS), is a major factor driving childhood overweight, violating multiple rights under the United Nations Convention on the Rights of the Child. Recent years have seen a shift from traditional to digital marketing channels, with evidence suggesting that digital marketing of HFSS products has comparable or even greater adverse effects than traditional media. Children, often unsupervised, access digital media from an early age, intensifying the urgency to address this issue. In the ESA region digital media use is growing but evidence is limited on the extent and nature of digital marketing of unhealthy products to which children are exposed, possibly due to the lack of regulation in digital spaces. As devices become more widely distributed this will increasingly become one of the drivers to high prevalence rates of childhood overweight.

The pervasive **marketing of unhealthy** foods HFSS, within a largely **unregulated food environments** is especially concerning. Sub-Saharan African markets have a large informal sector, equivalent to at least 80% of total retail sales. Informal retailing, conducted by unregistered and unlicensed traders like street hawkers and market stall vendors, poses monitoring challenges. Positioned closer to consumers along transport routes and hubs, these traders appeal to customers through personalized service, stocking preferred brands, and offering credit. Emphasizing affordability, their product range includes small packs grocery items such as bread, maize meal, cooking oil, soft drinks, crisps, sugar, and single eggs. The lack of comprehensive sales data in East and Southern African (ESAR) countries hinders the estimation of market size and trends for packaged foods and non-alcoholic beverages. This data gap is particularly crucial given the informal sector's significant role in distributing unhealthy, ultra-processed items. Obtaining market sizing data becomes imperative to understand the scope of informal sales, both registered and unregistered.

Given the proliferation of marketing of all forms, coupled with an entirely unregulated food environment which influences the consumption of unhealthy products among children, violating several child rights, and contributing to the childhood overweight epidemic, UNICEF is seeking an individual consultant to conduct **digital marketing studies of food and non-alcoholic beverages** in three countries in ESAR – Zimbabwe, Tanzania and Uganda – **and market assessment** in two ESAR countries, Zimbabwe and Tanzania.

Scope of Work

Purpose

Under the overall supervision of the Regional Nutrition Advisor and working closely with the Nutrition Specialist for overweight prevention, food environments and nutrition of school age children and adolescents, the individual consultant will conduct a study that consists of 1) an analysis of the potential exposure and the power of digital marketing to adolescents in Zimbabwe, Tanzania, and Uganda, and 2) a study on market sizes and trends in sales of food and non-alcoholic beverages in Zimbabwe and Tanzania.

Objectives

1. Monitoring of digital food marketing:

- a. To situate digital marketing of food and non-alcoholic beverages at national, regional and international level, drawing on policies, laws and regulatory frameworks
- b. In the context of Zimbabwe, Tanzania, and Uganda, describe and assess:
 - i. the digital media and marketing landscape through desk research on adolescent device use, platform preference and digital marketing prevalence;
 - ii. the most popular foods and non-alcoholic beverages, including preferred brands for each country, particularly among adolescents;
 - iii. the digital marketing strategies, emphasizing the influence wielded and tactics used, and assessing adolescents' potential exposure to these.

2. Market sizing:

- a. To size market in retail value for i) total packaged food categories, ii) sugar-sweetened beverages (SSBs), and iii) chained fast food outlets latest year¹;
- b. To identify the priority five to six packaged food categories by retail sales;
- c. To provide a three-year historic growth rate for total packaged food and priority food categories/SSBs, to assess and compare how these products have performed over time;
- d. To rank leading manufacturers in packaged food, SSB and chained fast food operators based on retail sales for latest year.

Expected results

The completion of the assignment will fill a significant evidence gap in understanding some of the current and future key drivers of the increasing consumption of unhealthy products among children and adolescents, and consequent overweight and obesity burden in three ESAR countries. Resulting recommendations on how best to address these obesity drivers will support policymakers and other stakeholders involved in the design, implementation, and evaluation of public policies that regulate the exposure and power of unhealthy food and beverage products.

Activities and Tasks:

MONITORING OF DIGITAL FOOD MARKETING (COMPONENT A)

To guide the monitoring and restriction of digital marketing of unhealthy foods and beverages aimed at children and adolescents the proposed methodology will include the WHO CLICK monitoring framework², specifically, the first two steps of the CLICK framework where C stands for "Comprehend the digital ecosystem" and L represents "Landscape of campaigns". For the latter, methods will also include the WHO Protocols and Templates³ for monitoring marketing of unhealthy products to children and adolescents in social media.

Activities and tasks related to CLICLK methods step 1, comprehending the digital ecosystem (Component A1):

¹ 2022 or 2023 as available

² https://www.euro.who.int/__data/assets/pdf_file/0008/396764/Online-version_Digital-ktg_March2019.pdf

³ <https://www.euro.who.int/en/health-topics/disease-prevention/nutrition/activities/monitoring-of-marketing-of-unhealthy-products-to-children-and-adolescents-protocols-and-templates>

- Map and develop a summary of existing policies, laws, and regulatory frameworks around digital marketing on unhealthy foods and non-alcoholic beverages, classified by international, regional and by the 3 selected countries (Zimbabwe, Tanzania and Uganda)
- Identify available data on child and adolescent devices and media use, food practices and brand preferences in Zimbabwe, Tanzania and Uganda.

Activities and tasks related to CLICLK methods step 2, Landscape analysis of social media campaigns (Component A2):

- Select key social media platforms, influencers, and brands to be assessed,
- Develop data collection guides for data capture of advertising with examples.
- Engage UNICEF Country Offices (CO) in the planning, data collection, and interpretation phases.
- Carry out data capturing, coding, and analysis for each product's power and nutrient profile, using the AFRO WHO Nutrient Profile Model⁴.
- Critical analysis and write up of campaigns in Zimbabwe, Tanzania and Uganda of food and beverage brands through nutrient profiling and power analysis and influence of the identified campaigns on social media platforms.

MARKET SIZING (Zimbabwe and Tanzania only) (COMPONENT B)

Following market analysis standard procedures, this component will consist of three parts (B1, B2, and B3), combining desk research, data collection and analysis.

Activities and tasks related to Component B1:

- Secondary data analysis, including but not limited to import, export and production statistics; country investment reports; company reports of leading players in processed food, SSBs and fast-food including sales data; academic papers on the formal and informal retail market; NGO reports on food security; national and specialist press articles.

Activities and tasks related to Component B2:

- Analysis of local data as available: (a) Any available UNICEF local partner data in Zimbabwe and Tanzania; (b) Using industry standard methods, remotely contract and manage store audits as possible in both formal and informal retail outlets in both countries, analysing results to identify, by retailer channel: penetration levels for food and beverage categories, leading brands, promotions being offered, pack size/number of units, average price points (among others).
- Engage UNICEF COs to identify local partners, sources of available data, and suitable candidates for local store audits.

Activities and tasks related to Component B3:

- Identification of candidate participants for individual stakeholder consultations on market size value for processed/unhealthy foods (e.g. agri-food economists, NGOs, Importers, Government authorities, leading manufacturers, chained grocery outlet retailers, wholesalers/distributors, chained fast food outlet operators, wherever possible)
- Adapt standard Industry Discussion Guide to local context to facilitate meaningful engagement on Zimbabwe and Tanzania market conditions and consumption trends, consumer preferences, marketing campaigns, sales patterns, and business priorities.
- Undertake consultations, transcribe, code and analyse transcripts.
- Triangulate data sources for comprehensive analysis based on desk research, data as available and stakeholder consultations:

⁴ https://ncdalliance.org/sites/default/files/resource_files/9789275118733_eng.pdf

- a. To size market for chained fast food outlets latest year/2022 or 2023 as available and over three-year historic period;
- b. To rank leading manufacturers in packaged food, SSB and chained fast food based on retail sales for latest year/2022 or 2023 as available.
- Develop bespoke data file (Microsoft Excel) of packaged food and beverages by project end.

Food Category Coverage: in consultation with UNICEF, identify the most relevant packaged food categories to the aims of the project. Priorities need to be identified to inform the market sizing process e.g. focus on packaged foods high in saturated fats, sugars and salt that can be eaten with minimal or no preparation such as sugary cereals and savoury snacks, vs inclusion of commodity food (cooking oil, flour etc).

Data Coverage: Provide a three-year time series, 2020-2022 or 2021-2023 as available. Retail sales to be given in constant (without inflation) and current terms (with inflation).

- Retail sales for total packaged foods aggregated and 5-6 leading packaged/processed food categories. The categories to be decided in consultation with UNICEF, however these can be finalised at a later stage before primary research commences if required.
- Retail sales for total SSBs (aggregated)
- Retail sales for chained fast-food outlets.

The consultant will share the methods applied in the Food Digital Marketing Monitoring and the Market Sizing alongside a detailed guidance document explaining the methodology of the Market Sizing Industry standard process. The consultant will hold a stakeholder event to support ESARO in capacity building activities in ESAR COs and institutions on undertaking digital marketing analysis and market sizing of foods and beverages.

Outputs/Deliverables:

Deliverables
<p>Deliverable 1: 1.A & B Combined proposal and methodology for Food Marketing Monitoring and Market Sizing for 3 countries</p>
<p>Deliverable 2: 2.A Desk review results for child & adolescent media use/ brand preferences/branded food sales in 3 countries 2.B Desk research and store audit results in 2 countries</p>
<p>Deliverable 3. 3.A Data collected cleaned and analysis ready in 3 countries on food marketing. 3.B Completion of expert consultations for market sizing in 2 countries.</p>
<p>Deliverable 4. 4.A Data analyzed in 3 countries with draft findings for discussion with UNICEF. 4.B Interim market sizing data and qualitative insights including presentation in 2 countries.</p>
<p>Deliverable 5. 5.A Final report, .ppt and policy briefs for 3 countries on food marketing. 5.B Completion of all data sets and analysis; final presentation on market sizing in 2 countries.</p>
<p>Deliverable 6: Market sizing methodology & stakeholder event delivered ESARO</p>

Desired competencies, technical background and experience

Minimum Qualifications required:

Master's in one of the following disciplines: Public Health, Nutrition, Public Policy, Psychology, Marketing, Technology (with a focus on health/nutrition). CVs of involved professional should be made available upon submission of a technical proposal.

Work Experience

The consultant should have experience in market research, digital ecosystem, knowledge of regulatory and cultural framework in ESAR region, childhood overweight prevention, excellent documentation and report writing skills (in English) and able to work in a multicultural environment. Experience working in ESAR Region, for the food industry and for UN agencies (especially UNICEF) will be considered an asset.

Specific requirements for the consultant:

Essential: experience of minimum 10 years in quantitative and qualitative research; releasing studies on behavioral change, food marketing directed to children, digital marketing, digital ecosystem, etc.

Desirable: Knowledge of CLICK monitoring framework/methodology for monitoring digital marketing of unhealthy foods and non-alcoholic beverages directed to children (or other similar internationally endorsed); nutrition/health, public health, nutrient profile models, quantitative and qualitative research.

Administrative issues

- Whenever possible, consultant should be requested to provide an all-inclusive cost in the financial proposal. Consultant should be reminded to factor in all cost implications for the required service / assignment. Consultant should break down the budget by objective and deliverables.

Progress reporting and documentation requirements:

- Attending monthly calls with ESARO Nutrition Specialist for progress reporting
- Data spreadsheets of (i) adverts of food and beverages collected in Zimbabwe, Tanzania, Uganda, (ii) retail value for packaged food categories and SSBs in Zimbabwe and Tanzania
- **Preliminary report and presentation** materials for the social media marketing analysis separate for Zimbabwe, Tanzania and Uganda
- **Preliminary report and presentation** materials for market size analysis in Zimbabwe and Tanzania separately
- **Draft combined report** separately for each country. In Tanzania and Zimbabwe the final report should combine the food marketing and market sizing component, while in Uganda, the final report will only include the food marketing study. The objective of the draft final report is to present in a clear manner, the results identified from a preliminary analysis of collected information. It should include a concise articulation of objectives outlined in this document, the methodology, a preview of the preliminary results, aligning key findings with outlined objectives. Additionally, the deliverable should describe study limitations, provide details of relevant data collection databases, and touches upon other pertinent aspects, providing UNICEF a comprehensive snapshot of the project's progress and context.
- **Country specific final report** in Word and PDF format
- **Country specific PPT** (including most relevant aspects of the methodology, main findings, and recommendations).
- Each final report should be accompanied by a **country specific policy brief** (3 in total) **directed to policy makers and to the private sector (businesses)**. Country briefs should not be longer than 8 pages, these should be concrete, visual and language oriented to the private sector and to policy makers. The brief should include the following sections: a brief introduction, main results, and recommendations.

Conditions

- No Resources and facilities will be provided by UNICEF; e.g. access to printer, office space...etc.
- When travel is expected as part of the assignment, it shall be clearly specified (e.g. location, duration, number of journeys ...etc.) in the TOR. Consultant shall be required to include the estimate cost of travel in the financial proposal. It is essential to clarify in the TOR that i) travel cost shall be calculated based on economy class travel, regardless of the length of travel and ii) costs for accommodation, meals and

incidentals shall not exceed applicable daily subsistence allowance (DSA) rates, as promulgated by the International Civil Service Commission (ICSC)

- Unexpected travels shall also be treated as above.
- As per UNICEF DFAM policy, payment made against approved deliverables. No advance payment is allowed unless in exceptional circumstances against bank guarantee, subject to a maximum of 30 per cent of the total contract value in cases where advances purchases, for example for supplies or travel, may be necessary.
- Individuals engaged under a consultancy contract will not be considered 'staff members' under the Staff Regulations and Rules of the United Nations and UNICEF's policies and procedures and will be entitled to benefits provided therein (such as leave entitlements and medical insurance coverage). Their conditions of service will be governed by their contract and the General Conditions of Contracts for the Services of Consultants.
- Consultants are responsible for determining and meeting their tax or duty liabilities in accordance with local or other applicable laws. UNICEF does not issue statements of earnings to consultants.

Risks

There are no risks associated with the consultancy assignment.

How to apply

Qualified candidates are requested to submit a cover letter, CV or P11 form and their technical proposals to the online recruitment portal (Talent Management System) or email provided.

Interested candidates to indicate their ability, availability, and rate (daily/monthly) expressed in US\$ for international consultants or KES for national consultants to undertake the terms of reference. The fees should be inclusive of other costs incurred such as travel/return ticket, VISA and subsistence allowances for international consultants who will be based in Nairobi.

Applications submitted without a fee/ rate will not be considered.