

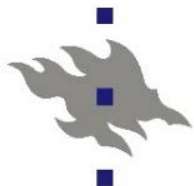
Study on the exposure of children to linear, non-linear and online marketing of foods high in fat, salt or sugar

A short introduction to the study

Client: European Commission, Directorate-General for Health and Food Safety



KANTAR PUBLIC



UNIVERSITY OF HELSINKI



Aim of the study

The study aims to get more insights and evidence on the exposure of children to marketing of HFSS foods through linear, non-linear and digital marketing.

Main objectives:

1. To **provide evidence** that will enable a variety of stakeholders to better their understanding of the problem; and as a result
2. Enable the development of **adequate instruments and tools to protect children** and address an important angle of the challenge of childhood obesity.

Research questions

Level of exposure

1. How much is an average EU child exposed to commercial communications and digital marketing of HFSS foods, through (a) online services, (b) non-linear AV media services, and (c) linear AV media services?

Content analysis

2. What type of (digital) marketing and commercial communication of HFSS foods does an average child see in the EU?
3. Are children especially targeted via these services?
4. To what extent is (digital) marketing and commercial communication of HFSS foods appealing to children and how?
5. To what extent do the provisions of the AVMSD and their application afford the required level of protection (for linear and non-linear AV media services)?

Additional tasks

6. What type of restrictions exist against digital marketing directed at children, either on a Member State level (legislation or regulation) or via own restrictions of (online) services?
7. To what extent are children exposed to advertising of foods that are not HFSS, in particular (raw) fruit and vegetables?
8. What are the industry expenditures on marketing of HFSS foods?

Scope of the study

Definitions (1)

- **HFSS foods:** Foods and non-alcoholic beverages containing nutrients, and substances with a nutritional or physiological effect, in particular fat, trans-fatty acids, salt or sodium and sugars, of which excessive intakes in the overall diet are not recommended or that otherwise do not fit national or international nutritional guidelines.
 - In this study we will use a coding framework based on the WHO nutrient profile to establish a classification of what is considered HFSS foods.
- **Children:** persons aged below 18 years-old
 - In this study, we distinguish between the age groups 4-12 and 13-17 and we added a the 18+ reference group.

Aim & scope of the study

Definitions (2)

- **(Non-)Linear AV media services:** AVMSD definition
- **Online services:** those online services that are currently not covered by the AVMSD, such as social media and websites
- **Marketing techniques:** this study looks at marketing and advertising accessed and/or actively made available to children via linear and non-linear AV media as well as other online services, e.g. advertisements, sponsorship messages, pre- and mid-rolls.
 - Outside the scope of this study is product placement and marketing via other channels (e.g. printed media, outdoor, cinemas, sponsorships of events and sport activities, handouts, and apps that can be downloaded to entertain offline).

Scope of the study

Geographical coverage

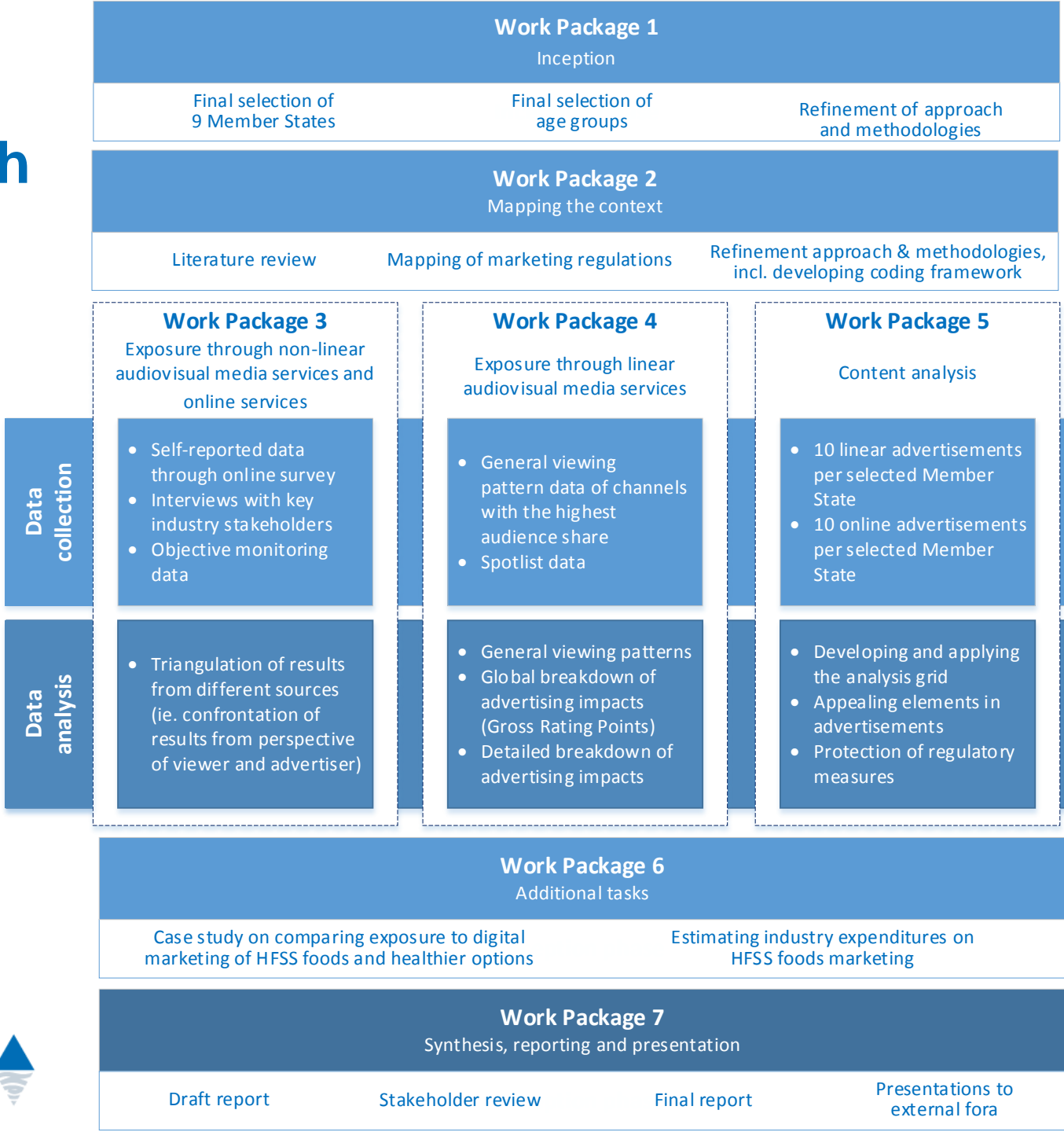
Selected **9 Member States** for in-depth analysis based on:

- Population size
- Gross Domestic Product (GDP) per capita
- Regulatory context
- 2016 figures on (online) advertising spending
- Confirmed data availability required for all WPs and tasks
- Geographical balance

Final selection of Member States:

- Belgium
- Czech Republic
- Hungary
- Italy
- Lithuania
- Netherlands
- Romania
- Spain
- Sweden

Overall approach



Continuous peer review

Quality assurance



**If you have any questions,
please contact**

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