

Children's exposure to age-restricted TV ads: 2021 update





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Introduction

The Advertising Standards Authority (ASA) is the UK's independent advertising regulator. We have been administering the **UK Code of Non-broadcast Advertising and Direct & Promotional Marketing** (written and maintained by the **Committee of Advertising Practice**) for over 60 years and the **UK Code of Broadcast Advertising** (written and maintained by the **Broadcast Committee of Advertising Practice**) for 18 years. We are responsible for ensuring that advertising is legal, decent, honest and truthful.

The Advertising Codes include rules to protect people who are vulnerable, including children (which the Codes define as those aged 15 and under) and young people (those aged 16 and 17). They include rules on the scheduling and placement of ads to ensure that under-18's exposure to advertisements for certain product categories, such as alcohol and gambling, is appropriately limited. The rules prohibit these ads from appearing in children's and young people's media and, where they appear in media targeting a predominantly adult audience, the content is restricted to ensure that they cannot appeal particularly to those under the age of 18.





Introduction

Since 2019, we have reported annually on children's exposure to age-restricted TV ads, such as ads for alcohol and gambling products, at the UK level. The objective of the ASA's reporting in this area is to provide longitudinal analysis of children's exposure to those TV ads, over a number of years, for products which attract public policy considerations.

This report provides an analysis of children's exposure to alcohol and gambling ads on TV since 2010, with an update of exposure data from 2021. For the first time, we also present data on children's exposure to alcohol and gambling ads on a national basis, covering England, Scotland, Wales, and Northern Ireland.

The ad exposure and viewing analysis presented is based on data reported by the Broadcasters' Audience Research Board (BARB). Previous reports have provided data from 2008 as this represented the first full year in which the gambling advertising rules were implemented. However, in 2010, a new BARB audience panel was introduced and, as a result, data comparisons pre and post 2010 may not be as relevant. Adjustments to geographical boundaries as part of this panel change mean that 2010 is also the first year from which we can provide comparable data and analysis on exposure across the UK nations.

The choice of this starting point has implications for the patterns of audience exposure that are identified in this report, in comparison with previous reports; it is important to interpret their significance within the context of the parameters selected.

NB: due to lockdown restrictions as a result of the Covid-19 pandemic, and the impact this had on panel management, the BARB sample sizes in Scotland, Wales, and Northern Ireland fluctuated in 2020 and 2021. While panel sizes remain suitably robust to report on, particularly for analysis over time, the variability of sample sizes in the devolved nations over the past two years should be treated with caution. Insights based on numbers solely from this time period should be considered within the context of the smaller sample size.





Key findings



Key findings

Alcohol ads:

- Between 2010 and 2021, children's exposure to alcohol advertising on TV decreased by three quarters, from an average of 3.2 ads per week in 2010 to 0.8 ads per week in 2021.
- The average number of alcohol ads children saw in 2021 (0.8 per week) reached the lowest level in the 12-year period covered. Exposure to alcohol ads has remained at similar levels for the past five years.

Gambling ads:

- Between 2010 and 2021, children's exposure to TV gambling ads decreased by just over a quarter from an average of 3.0 ads per week in 2010 to 2.2 ads per week in 2021.
- The 2021 exposure levels of 2.2 gambling ads per week represents the lowest level in the 12-year period covered and is half that of the peak average of 4.4 gambling ads per week in 2013.



Key findings

All TV ads: Between 2010 and 2021, children's exposure to all TV ads fell by almost two thirds (63.5%) from 226.7 ads per week in 2010 to 82.8 ads per week in 2021, the lowest in the 12-year analysis period.

The number of TV ads seen by children has continued to decline at a steady rate, falling by almost two thirds from the peak in 2013 – an average of 229.3 ads per week – to 82.8 ads per week in 2021. Over the same period, children's exposure to:

- TV alcohol ads decreased by just over two thirds;
- TV gambling ads decreased by a half.

This suggests that children's exposure to TV ads for alcohol is falling at a faster rate than their exposure to all TV ads. While the rate of decline in children's exposure to gambling ads on TV is marginally lower than the rate of decline in exposure to all TV ads. Children's exposure to gambling ads has remained at a lower level since the 2013 peak.





Annual exposure to all TV ads

This section contains data which provides important contextual information to the product category specific exposure data presented in the following sections of the report.



Key findings

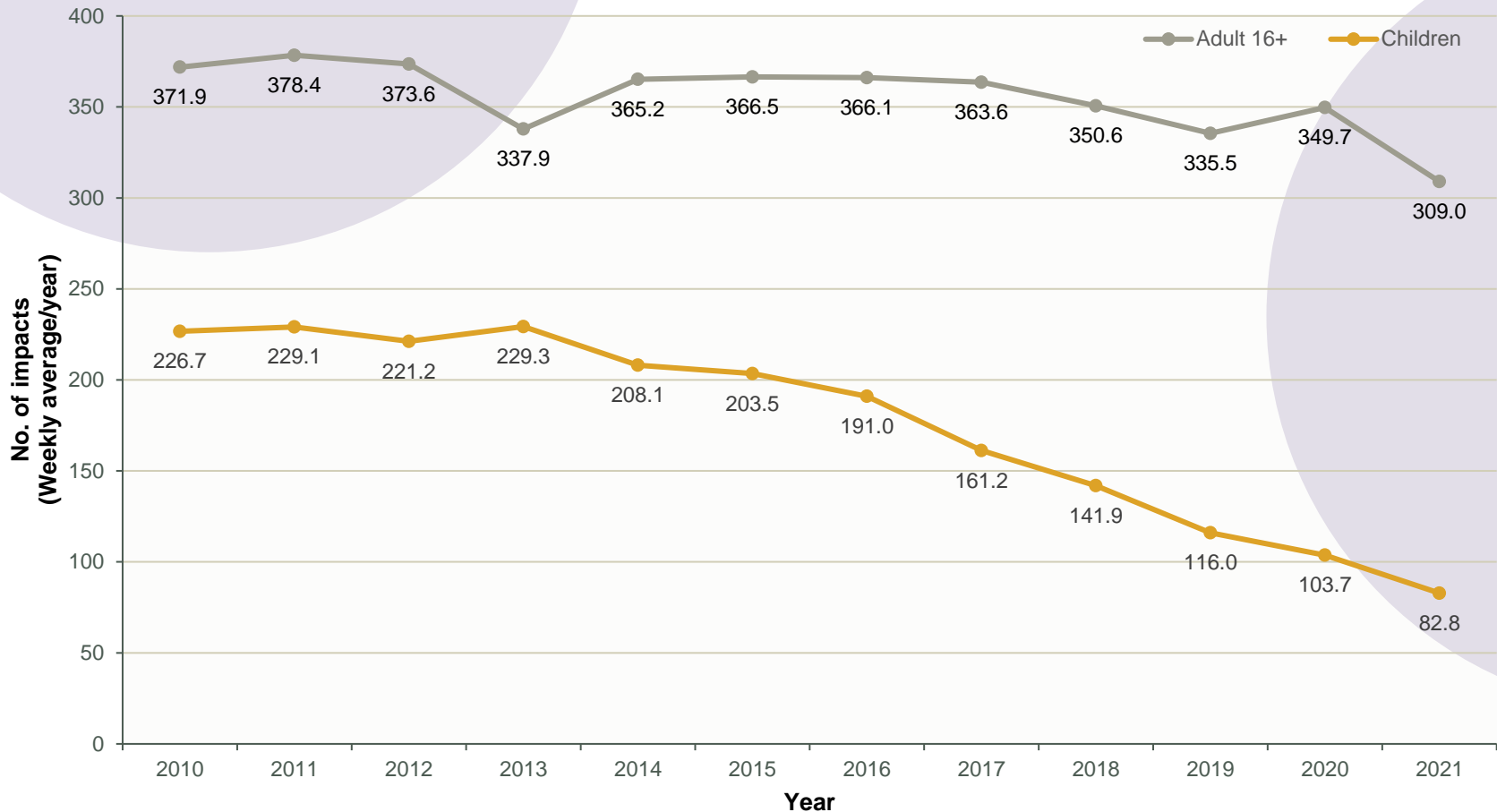
- Between 2010 and 2021, children's exposure to all TV ads decreased by 63.5% from, on average, 226.7 ads per week in 2010 to 82.8 ads per week in 2021, the lowest in the 12-year period. Children's exposure levels have continued to decline at a steady rate since the peak of 229.3 ads per week in 2013.
- Between 2010 and 2021, adults' exposure to all TV ads fell by 16.9% from 371.9 ads per week in 2010 to 309.0 ads per week in 2021. In 2021 adults' exposure to all TV ads was also the lowest in the 12-year reporting period.
- In contrast to the general decline in children's exposure, adults' exposure to all TV ads has fluctuated in the 12-year reporting period.
- Children's ad exposure, relative to adults, has fallen from a peak of 60.9% in 2010 to 26.8% in 2021. That means children saw, on average around one TV ad for every four seen by adults in 2021.
- Children's exposure to television advertising has fallen significantly in every UK nation from a peak in 2013. Despite a slight increase in some nations in 2020, in 2021 children's exposure in every nation was below pre-pandemic levels.



Children's exposure to all TV ads fell to its lowest level in 2021

- Between 2010 and 2021, children's exposure to all TV ads decreased by 63.5%, to the lowest level in the 12-year period.
- Between 2010 and 2021, adults' exposure to all TV ads fell by 16.9%, to the lowest level in the 12-year period.
- Adult's exposure to TV ads increased slightly in 2020, likely as a result of increased broadcast television viewing during Covid-19 lockdowns.

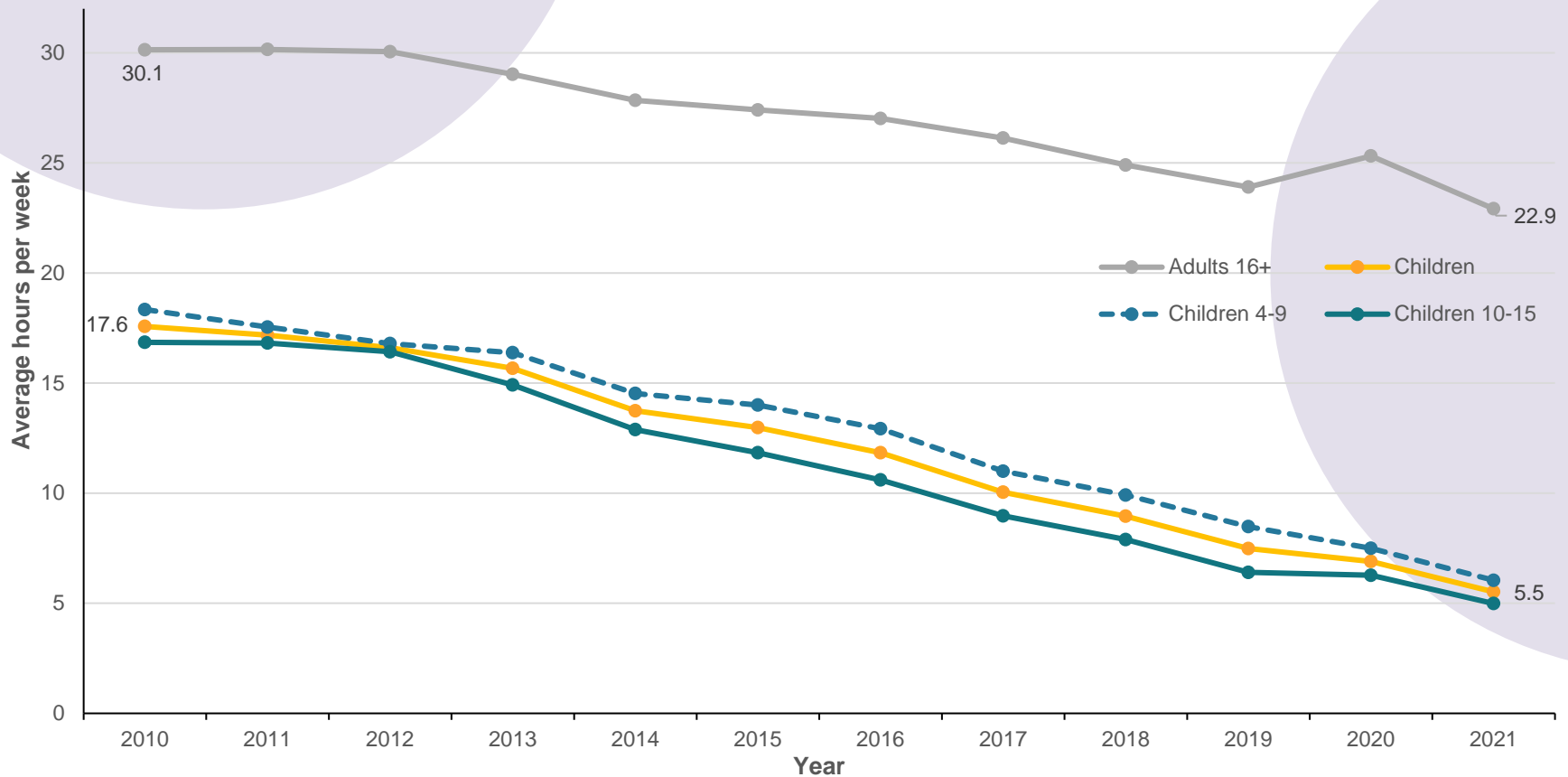
Average weekly exposure per year – age group



Time spent by children watching TV continued to decline in 2021

- Continuation of the downward trend in children's exposure to TV ads is likely to be driven by decreased TV viewing and increasing consumption of online media, such as on-demand, online video, and social media.
- BARB viewing data analysis indicates the amount of time children spent watching broadcast television continues to decrease. In 2021, children aged 4-15 watched, on average, 5.5 hours of television per week, down by 1.4 hours from 2020, and less than a third of the peak viewing levels in 2010 (17.6 hours per week).

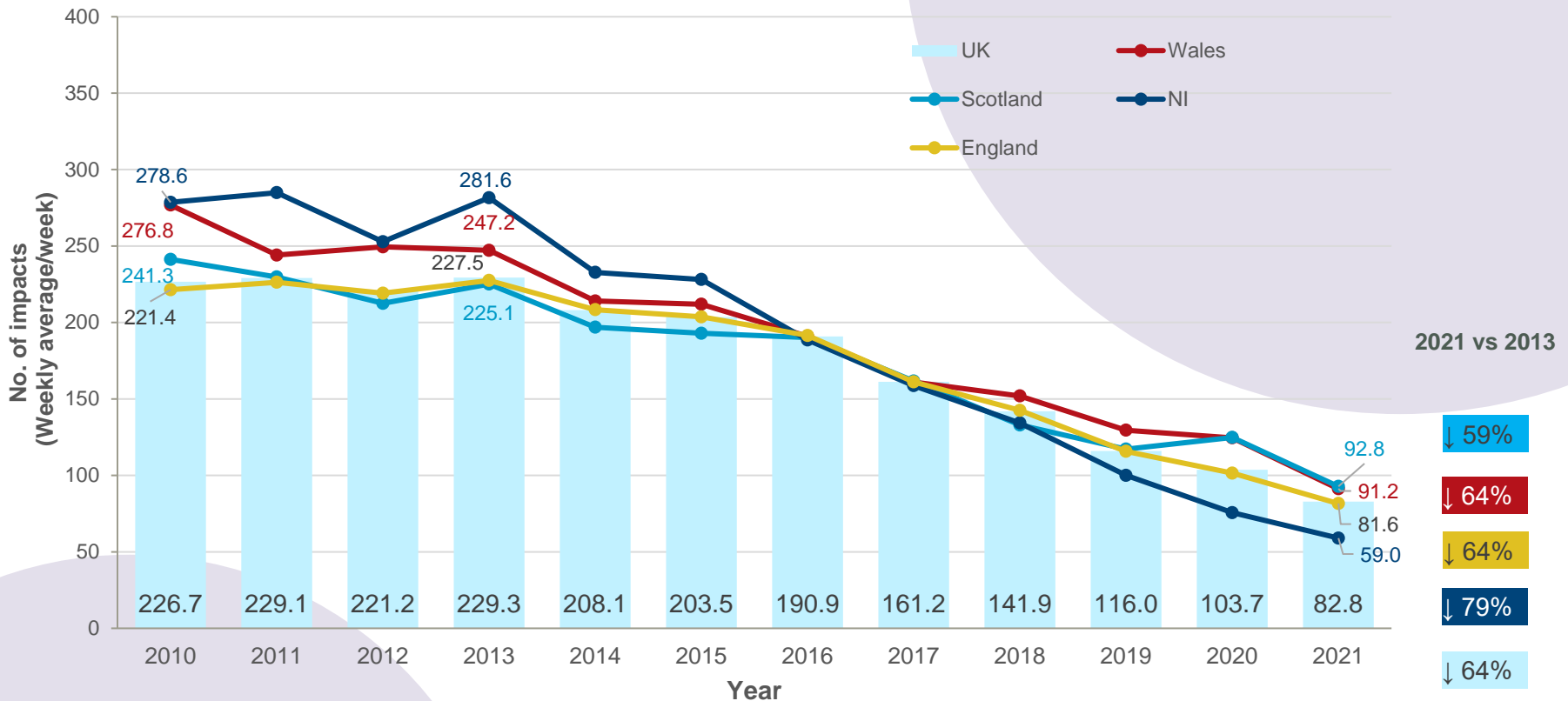
Average hours of television viewing – by age group



Children's exposure to TV ads has fallen significantly across each of the nations from the network peak in 2013

- Exposure levels in NI fell the most, down by 79% from 2013*, to the lowest levels across the four nations in 2021.
- Relative to the other nations, Scotland saw the lowest decline in ad exposure – but it remains a significant decline of 59%.

Average weekly exposure to TV ads: Children 4-15 by nation



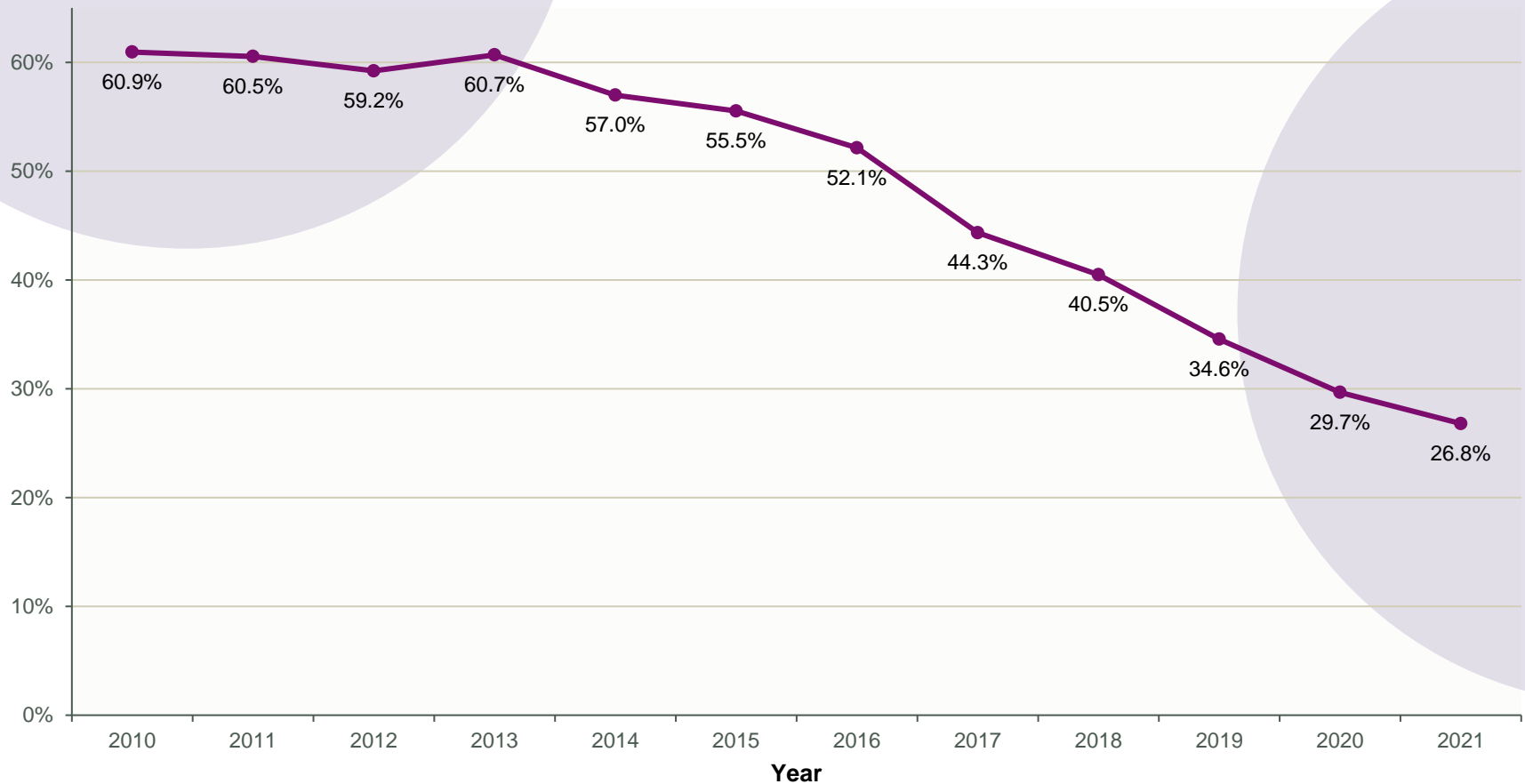
Data for individual nations in 2020 and 2021 should be considered with caution in the context of varying sample sizes in this period (see note on Slide 4)
 *2013 taken as base year for comparison as exposure to all TV ads across the UK peaked in this year



In 2021 children saw on average around one TV ad for every four seen by adults

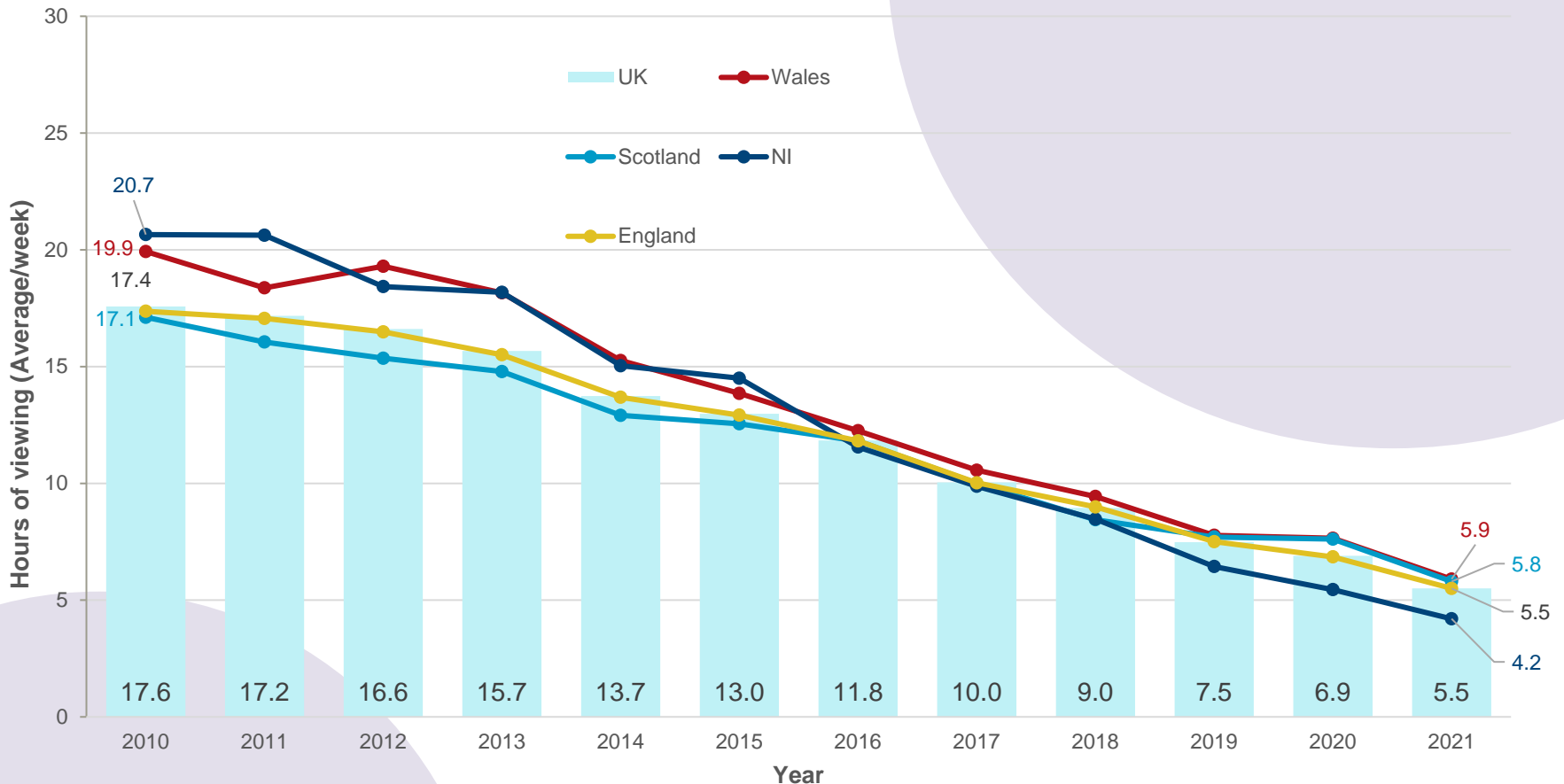
- Children's exposure to all TV ads, relative to adults, has fallen from a peak of 60.9% in 2010 to 26.8% in 2021.

Children's exposure to all TV ads as a percentage of adults' exposure



Children's television viewing has fallen by more than two thirds across each of the nations since 2010

Hours of television viewing: Children 4-15 by nation



Data for individual nations in 2020 and 2021 should be considered with caution in the context of varying sample sizes in this period (see note on Slide 4)





Exposure to TV ads: comparison with TV ads for Toys



Children's exposure to TV ads: comparison with TV ads for toys

The following chart contrasts children's exposure to TV ads for toys with their exposure to TV ads for alcohol and gambling (the primary subjects of this report) and is provided for context.

It illustrates that high exposure levels are possible when advertisers can legitimately and specifically target their product advertising to child audiences. Children's exposure to TV advertising for toys remains significantly higher than their exposure to alcohol or gambling advertising on TV.

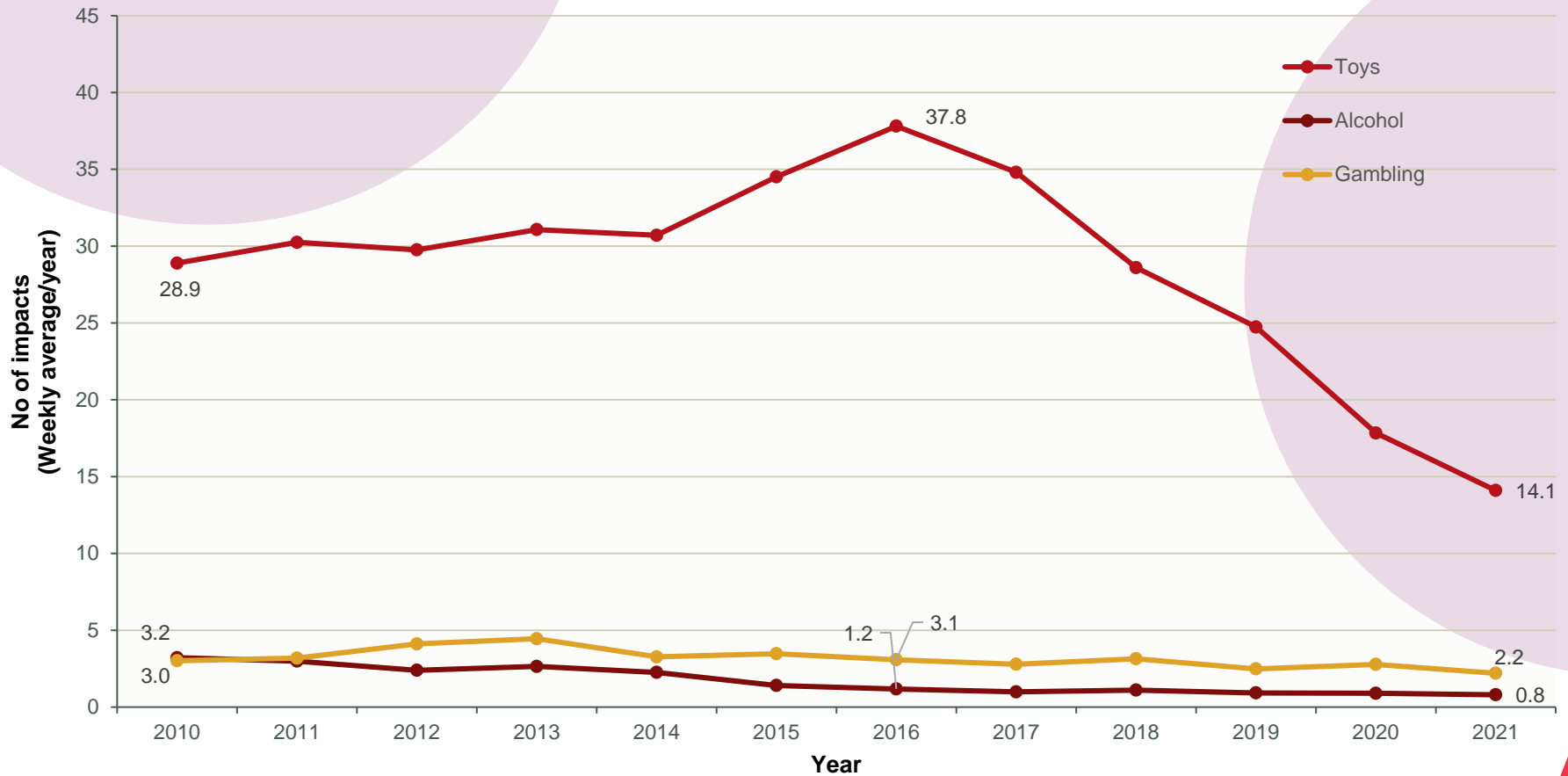
The BCAP Code places restrictions on TV ads for alcohol and gambling products from being scheduled during or adjacent to children's programmes, as well as programmes of particular appeal to children. TV ads for toys are not subject to scheduling restrictions, however, the BCAP Code does restrict certain ad content, for example, prohibiting brands from making direct exhortations to children to buy a product, or encouraging them to persuade a parent or guardian to buy it for them.



Children's exposure to TV ads: comparison with TV ads for toys

- Children's exposure to toy ads peaked in 2016 at 37.8 ads per week, more than 12 times the average number of ads seen by children for gambling (3.1) and more than thirty times the number of ads for alcohol (1.2) in that year.

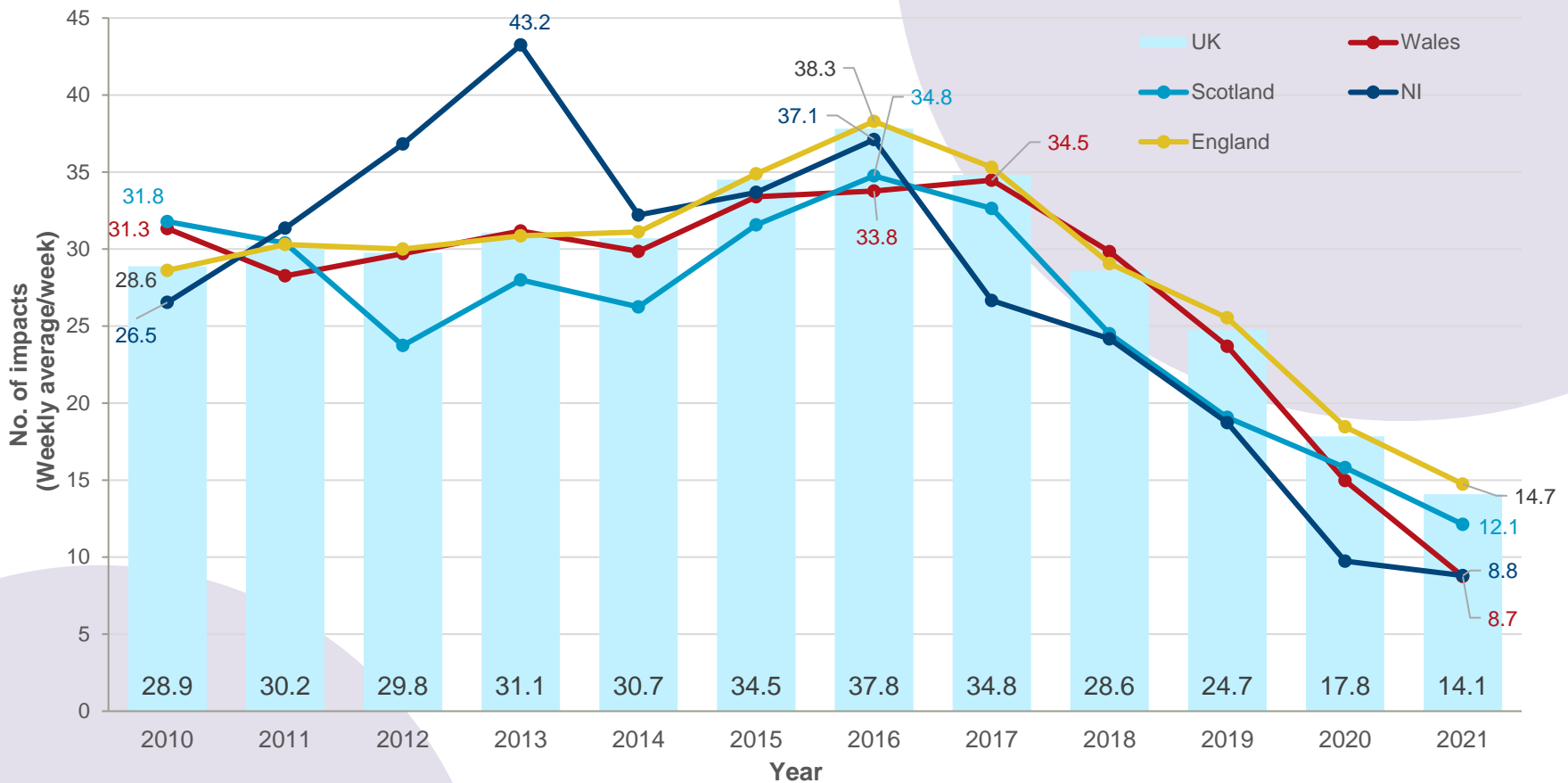
Average weekly exposure to TV ads – by category



Children's exposure to toy ads has fallen by around half since 2010

- Children's exposure to toy ads peaked at different periods for the nations and has fallen by 60-75% in each nation since the 2016 UK-wide peak for toy ad exposure.

Average weekly exposure to toy ads: Children 4-15 by nation





Exposure to TV ads for alcohol products



Exposure to TV ads for alcohol products

The BCAP Code states:

32.2 [The following products] may not be advertised in or adjacent to programmes commissioned for, principally directed at or likely to appeal particularly to audiences below the age of 18:

32.2.1 alcoholic drinks containing 1.2% alcohol or more by volume

32.4 [The following products] may not be advertised in or adjacent to programmes commissioned for, principally directed at or likely to appeal particularly to persons below the age of 16:

32.4.7 drinks containing less than 1.2% alcohol by volume when presented as low alcohol or no-alcohol versions of an alcoholic drink



Key findings

- Between 2010 and 2021, children's exposure to alcohol advertising on TV reduced by three quarters from an average of 3.2 ads per week in 2010 to 0.8 ads per week in 2021. The average number of alcohol ads children saw in 2021 was the lowest in the 12-year period covered, and remained at similar levels to that observed in the five previous years.
- Children's exposure to alcohol ads relative to adults has fallen from a peak of 39.9% in 2010 to 17.1% in 2021. That means children saw, on average, around one alcohol ad on TV for every six seen by adults in 2021.
- In 2021, alcohol ads made up 1.0% of all TV ads seen by children. Alcohol ads continue to make up less than 1.5% of all TV ads seen by children annually and exposure levels have remained around or below 1.0% since 2015.



Key findings

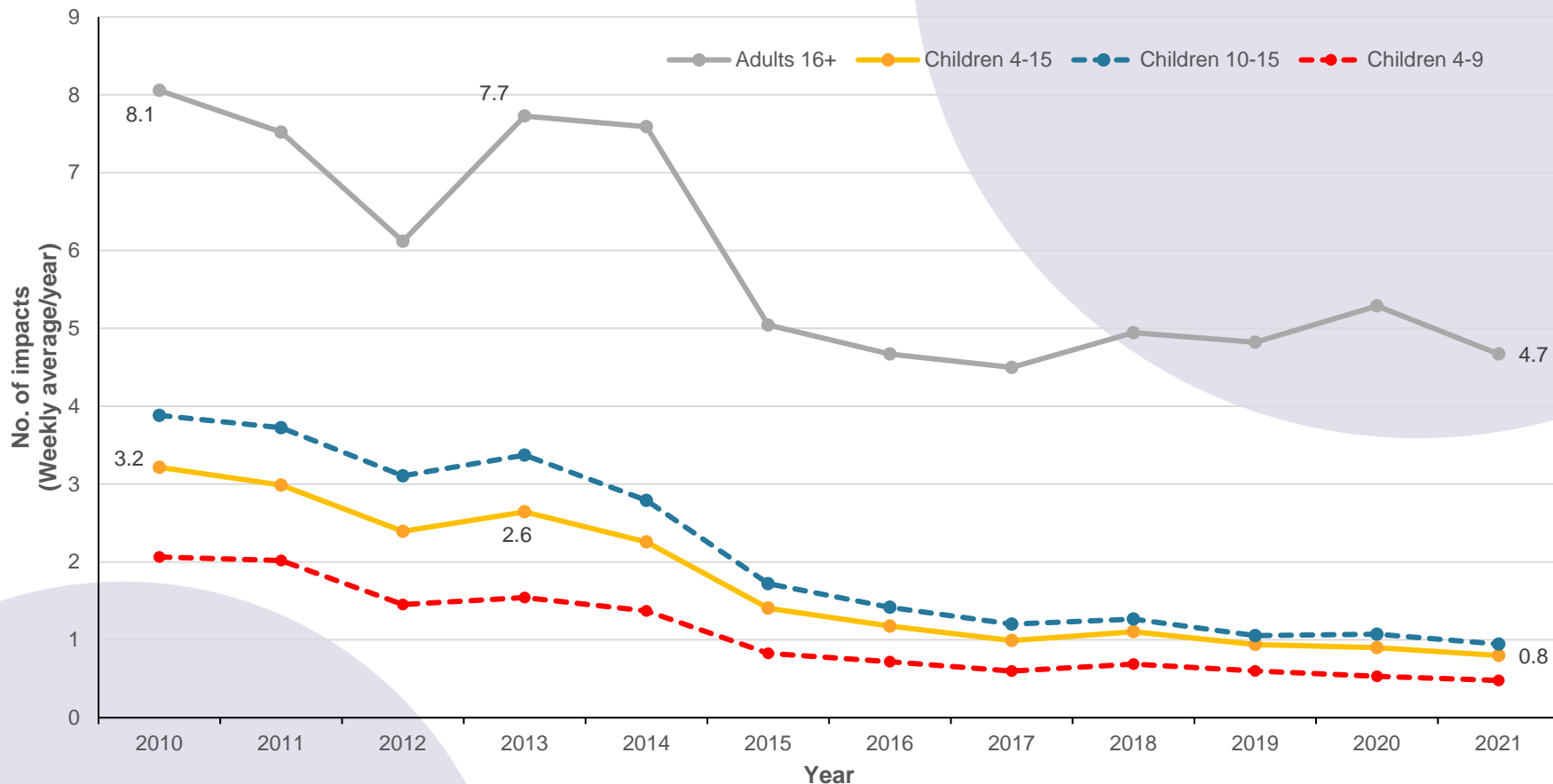
- Children's exposure to all TV ads reduced by almost two thirds from a peak of 229.3 ads per week in 2013 to a low of 82.8 ads per week in 2021. Over the same period, children's exposure to alcohol ads on TV reduced by just over two thirds. This suggests children's exposure to alcohol ads continues to fall at a faster rate than children's exposure to all TV ads.
- Children's exposure to alcohol TV ads reduced by at least two thirds in every nation from the 2013 peak. In Northern Ireland exposure reduced by over three quarters.



In 2021 children saw on average 0.8 alcohol ads per week on TV

- Between 2010 and 2021, children's exposure to alcohol ads on TV reduced by three quarters from an average of 3.2 ads per week in 2010 to 0.8 ads per week in 2021.
- Children's exposure in 2021 (0.8 ads per week) reached the lowest level in the 12-year period covered, and remained at similar levels to that observed in the five previous years.

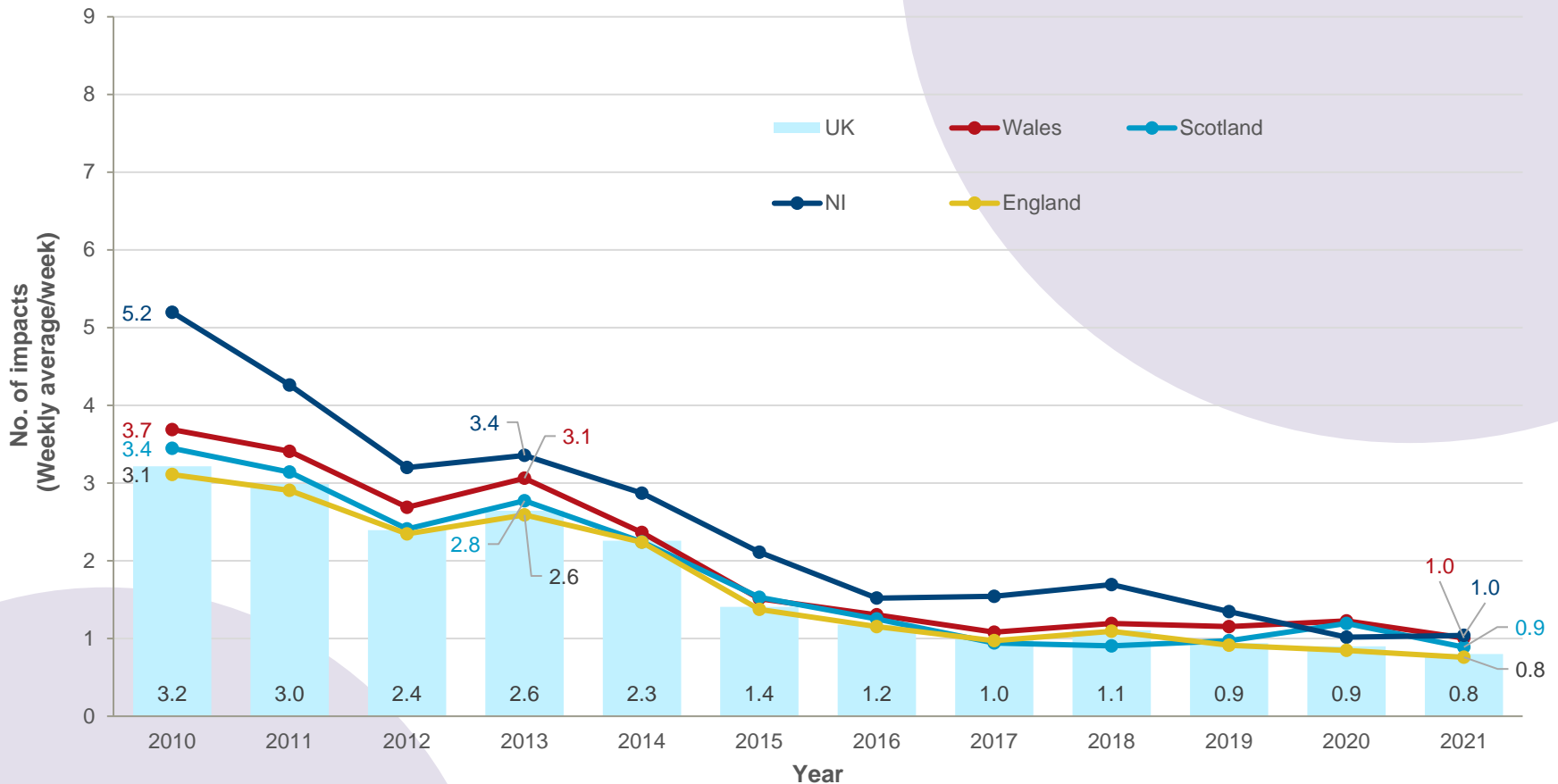
Average weekly exposure per year – age group



Children across each nation viewed around one alcohol TV ad per week in 2021

- Exposure to alcohol TV ads was broadly consistent across nations, ranging from 1.0 ads per week in Scotland and Wales to 0.8 ads per week in England.
- Exposure levels have reduced by at least two thirds across each nation since 2013* and have remained stable at low levels in recent years.

Average weekly exposure to alcohol ads: Children 4-15



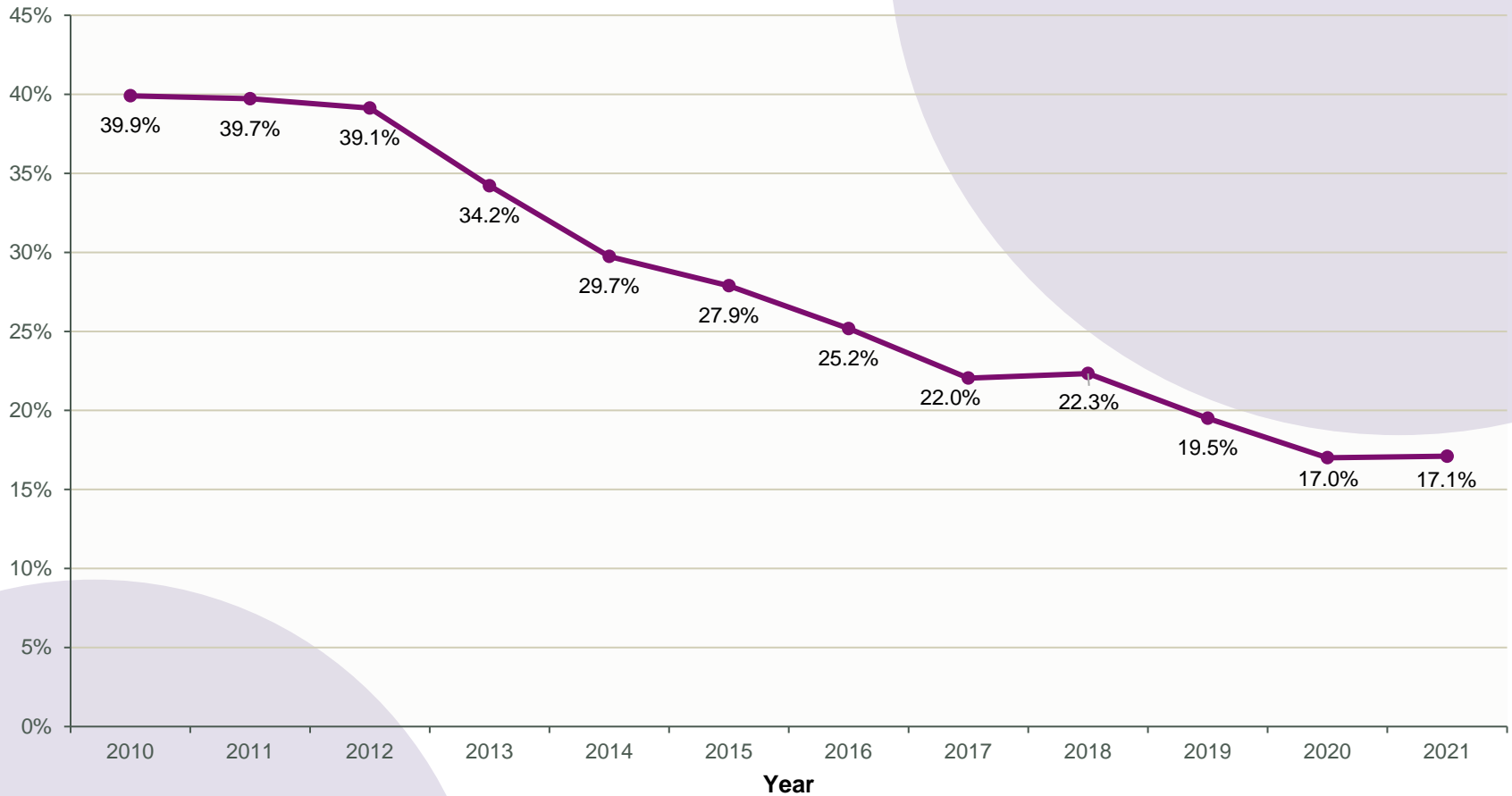
Data for individual nations in 2020 and 2021 should be considered with caution in the context of varying sample sizes in this period (see note on Slide 4) *2013 taken as base year for comparison as exposure to all TV ads across the UK peaked in this year.



In 2021 children saw on average around one alcohol ad for every six seen by adults

- Children's exposure to alcohol TV ads, relative to adults, has fallen from a peak of 39.9% in 2010 to 17.1% in 2021.

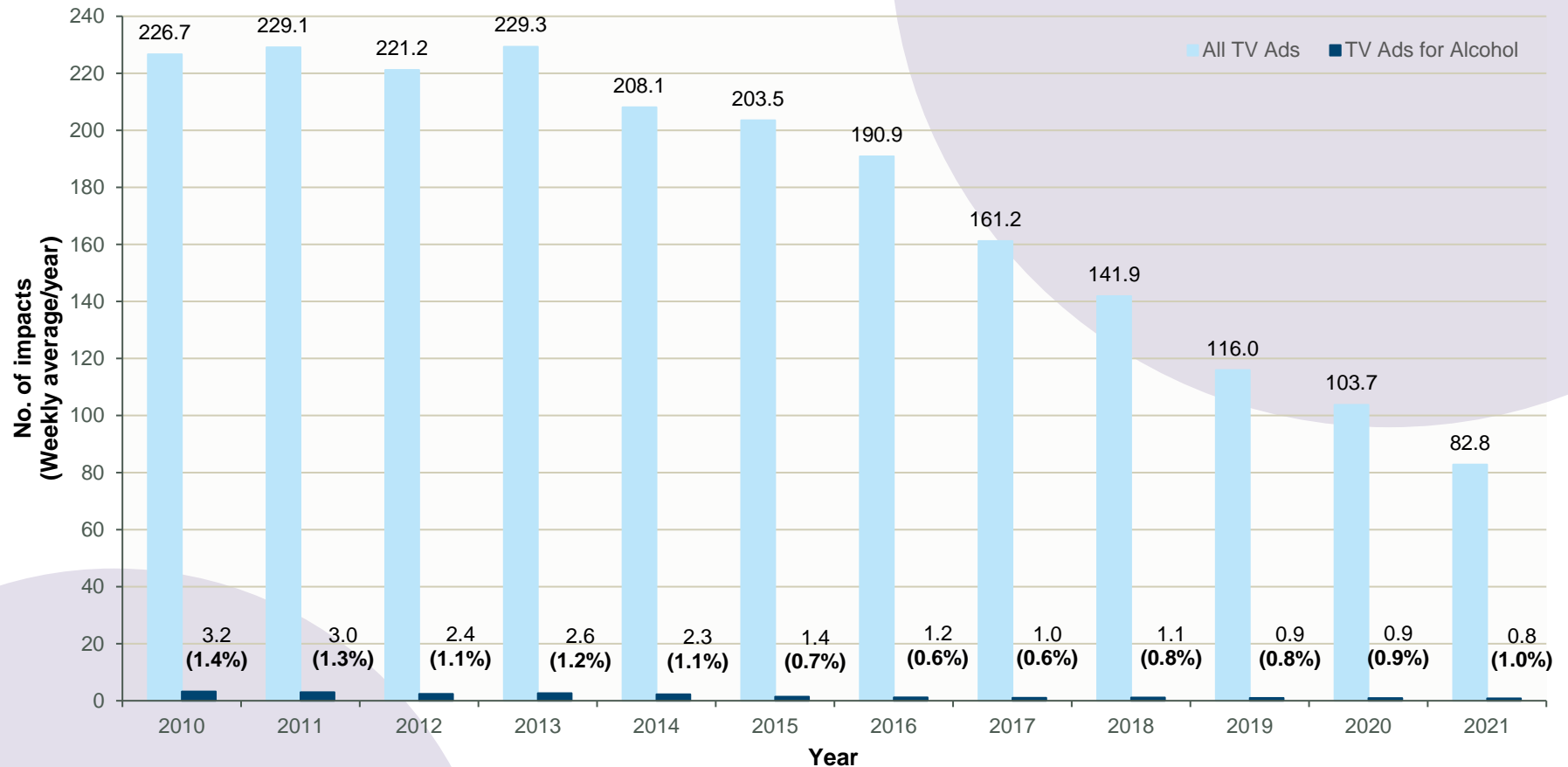
Children's exposure to alcohol ads as a percentage of adults' exposure



Alcohol ads made up 1.0% of all TV ads seen by children in 2021

- Alcohol ads continue to make up less than 1.5% of all TV ads seen by children annually across the analysis period.
- Children's exposure to all TV ads reduced by over 60% from a peak of 229.3 ads per week in 2013 to a low of 82.8 ads per week in 2021. Over the same period, children's exposure to alcohol ads on TV reduced by just over two thirds. This suggests children's exposure to alcohol ads continues to fall at a faster rate than exposure to all TV ads.

Children's exposure to Alcohol TV ads as a percentage of exposure to all TV ads





Exposure to TV ads for gambling products



Exposure to TV ads for gambling products

The BCAP Code rules state:

32.2 [The following products] may not be advertised in or adjacent to programmes commissioned for, principally directed at or likely to appeal particularly to audiences below the age of 18:

32.2.2 gambling except lotteries, football pools, equal-chance gaming (under a prize gaming permit or at a licensed family entertainment centre), prize gaming (at a non-licensed family entertainment centre or at a travelling fair) or Category D gaming machines

32.4 [The following products] may not be advertised in or adjacent to programmes commissioned for, principally directed at or likely to appeal particularly to persons below the age of 16:

32.4.1 lotteries

32.4.2 football pools

32.4.3 equal-chance gaming (under a prize gaming permit or at a licensed family entertainment centre)

32.4.4 prize gaming (at a non-licensed family entertainment centre or at a travelling fair)

32.4.5 Category D gaming machines



Key findings

- Between 2010 and 2021, children's exposure to gambling ads fell by just over a quarter from an average of 3.0 ads per week in 2010 to 2.2 ads per week in 2021 – and decreased by half from a peak average of 4.4 ads per week in 2013. Children's exposure to gambling TV ads has varied over the 12-year period, but remained fairly stable at lower levels for the past five years.
- Children's exposure to gambling ads relative to adults' has fallen year-on-year from 36.0% in 2010 to 15.4% in 2021, the lowest in the 12-year period. That means children saw, on average, just under one TV ad for gambling for every six seen by adults in 2021.
- From 2010 to 2017 gambling ads made up, on average, less than 2% of all TV ads seen by children. Since 2018 this proportion has been above 2% and sits at 2.6% in 2021.



Key findings

- Since 2011* Bingo and Lottery & Scratchcards ads have consistently represented the majority of gambling TV ads seen by children.
 - In 2021 Children's exposure to Bingo ads fell to the lowest level since 2011.
 - Children's exposure to ads for sports betting has decreased from a peak in 2011 and has remained at a low level seen since 2019.
- Children's exposure to all TV ads reduced by almost two thirds from a peak of 229.3 ads per week in 2013 to a low of 82.8 ads per week in 2021. Over the same period, children's exposure to gambling ads decreased by half. This suggests that while children's exposure to gambling ads on TV has remained stable at a lower level since a peak in 2013, children's exposure to all TV ads has declined at a faster rate over the same period.
- Variations between devolved nations in gambling TV ad exposure widened in 2020 but stabilised in 2021. With the exception of Wales, in 2021 every nation experienced their lowest level of gambling TV ad exposure in the 12-year analysis period.

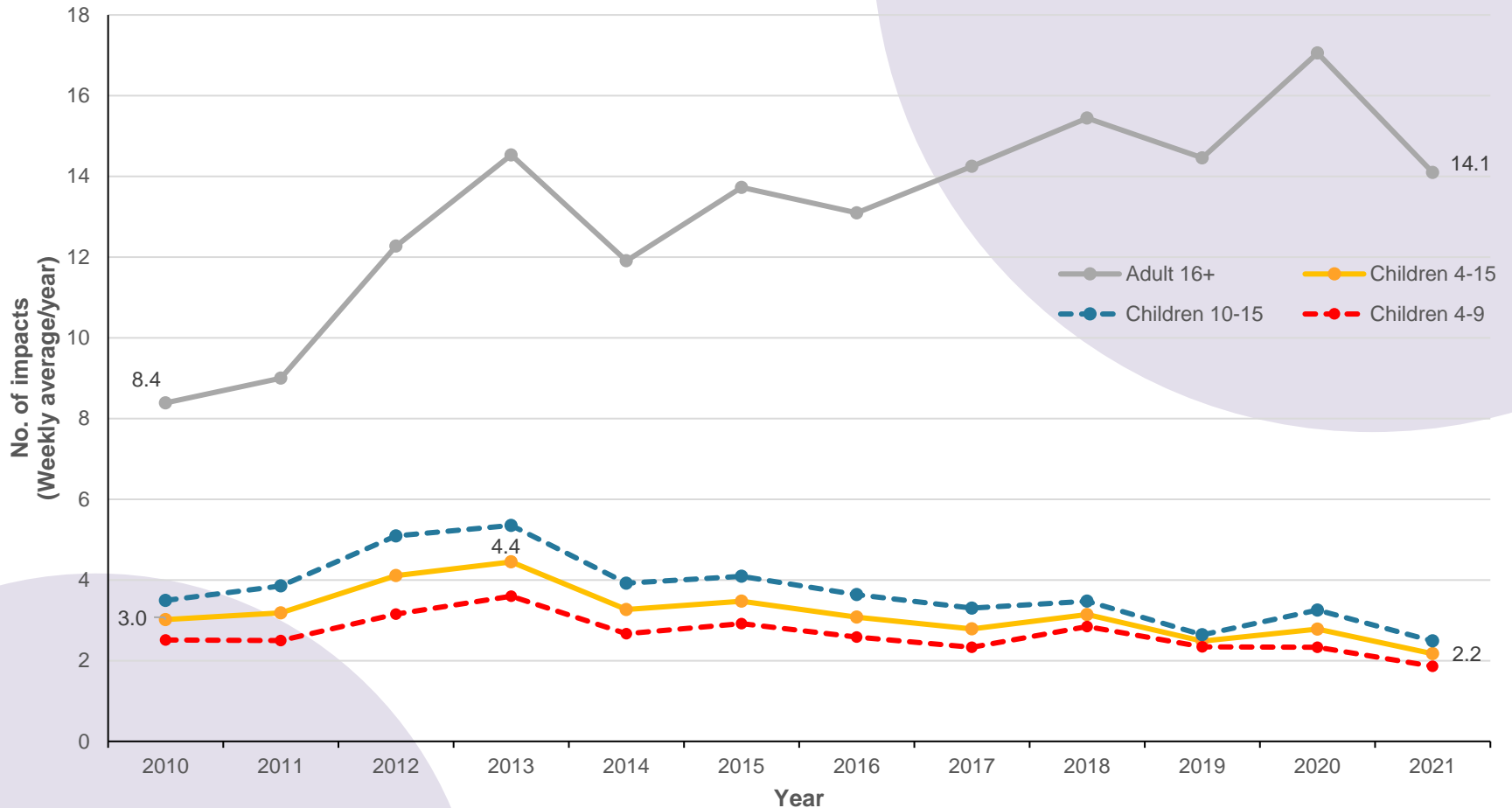
*2011 was the first year for which exposure data for gambling product categories can be reliably broken down, further information is provided in the footnote on page Slide 34.



In 2021 children saw 2.2 TV gambling ads per week on average

- Between 2010 and 2021, children's exposure to gambling ads decreased by just over a quarter from an average of 3.0 ads per week in 2010 to 2.2 ads per week in 2021.
- Despite fluctuations in exposure levels over the 12-year period, children's exposure to gambling ads has remained fairly stable at lower levels over the past five years.

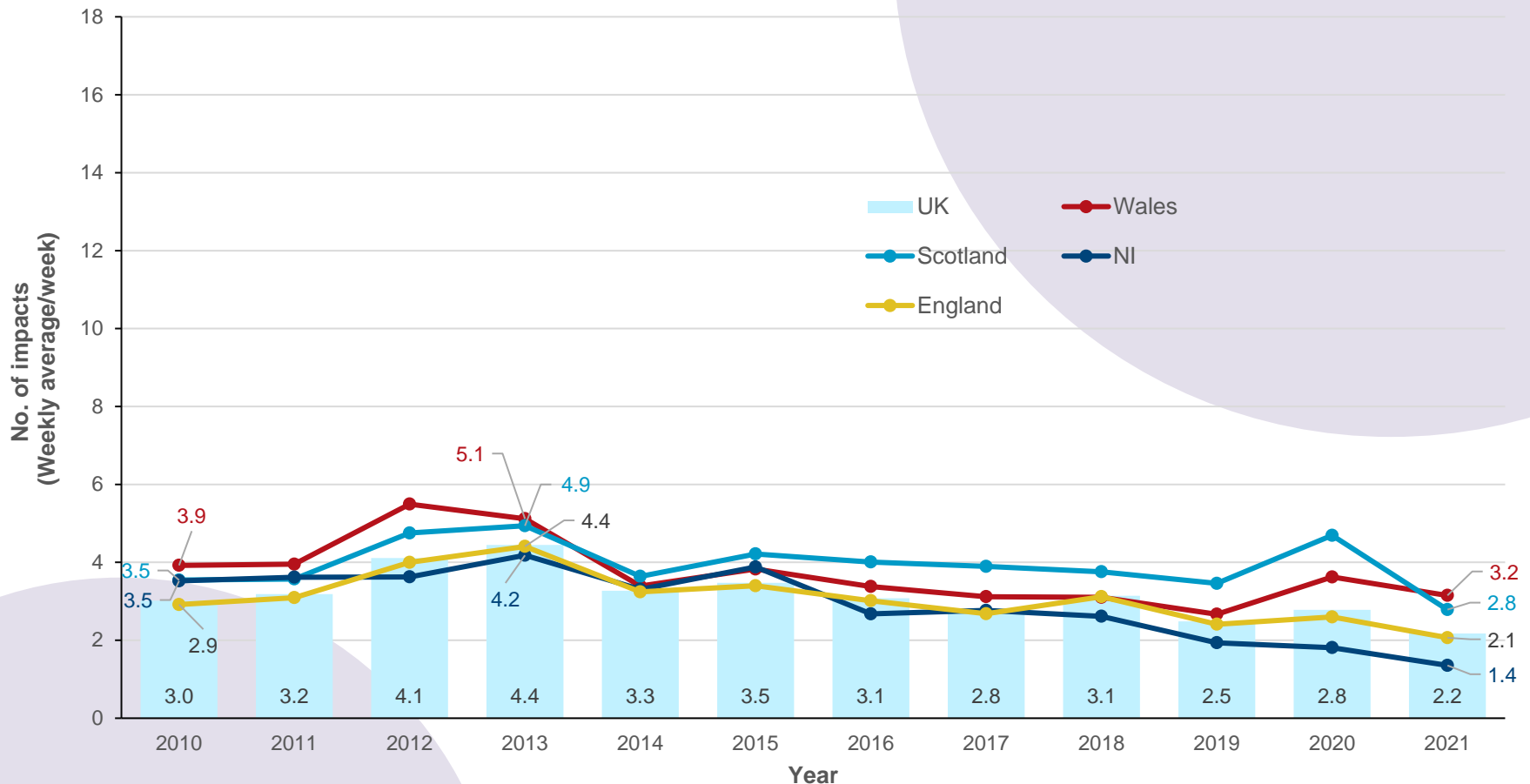
Average weekly exposure per year – age group



Impacts for gambling products have fallen in each nation since the peak in 2013

- Across the nations, children's exposure to gambling TV ads ranged from 1.4 ads/week in NI to 3.2 ads/week in Wales.
- In 2020 gambling ad exposure increased slightly across the UK – and in Scotland and Wales in particular – and differences between nations were more pronounced than in previous years. This could be explained by the context of variations in the wider advertising market during Covid-19 lockdowns. The national differences have stabilised in 2021.
- In 2021 gambling exposure rates fell to the lowest level in the 12-year monitoring period for each nation, excluding Wales.

Average weekly exposure to gambling ads: Children 4-15 by nation



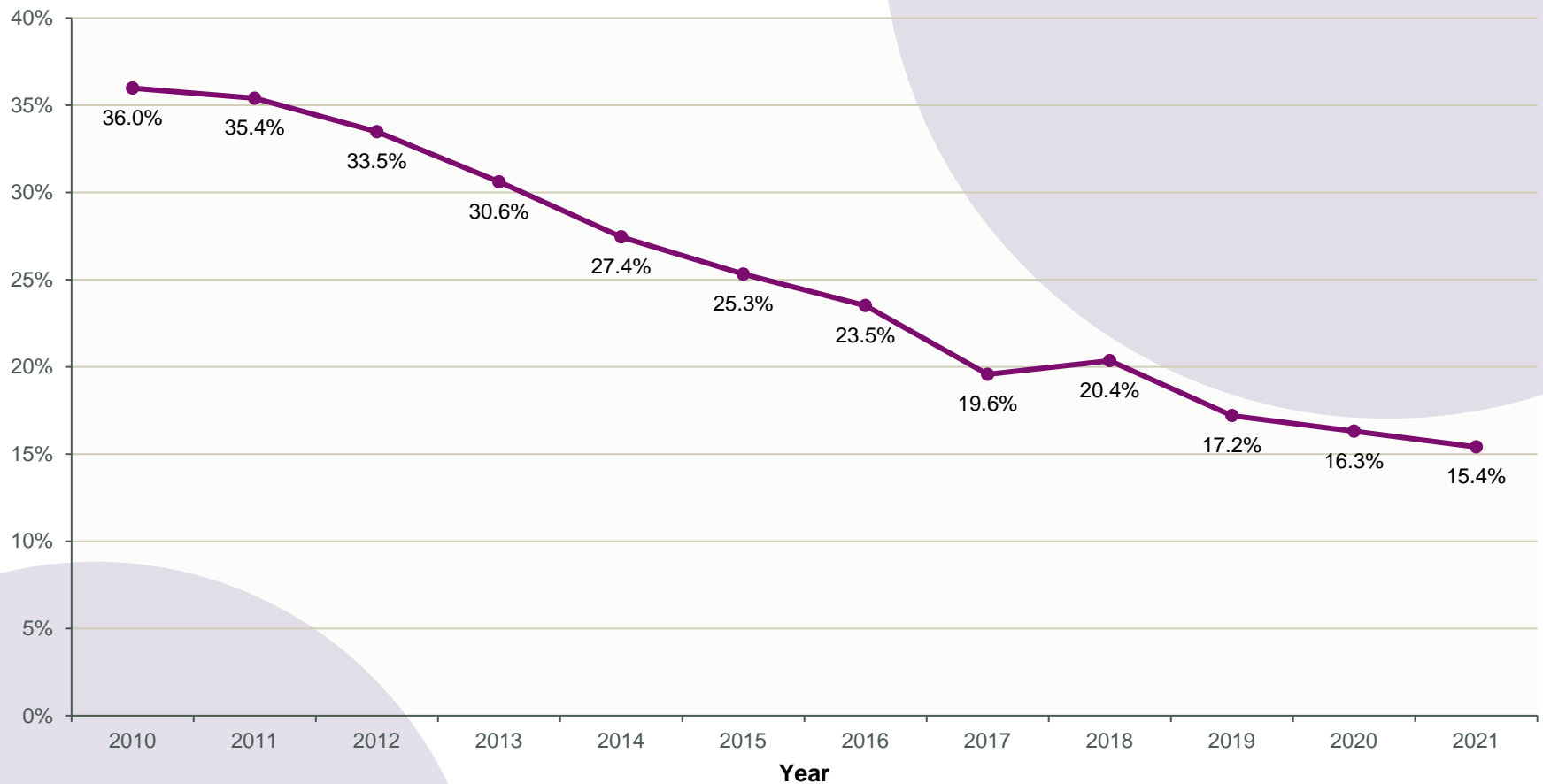
Data for individual nations in 2020 and 2021 should be considered with caution in the context of varying sample sizes in this period (see note on Slide 4) *2013 taken as base year for comparison as exposure to all TV ads across the UK peaked in this year.



In 2021 children saw on average just under one gambling ad on TV for every six seen by adults

- Children's exposure to gambling ads on TV, relative to adults', has fallen year-on-year from 36.0% in 2010 to 15.4% in 2021 – the lowest in the 12-year period.

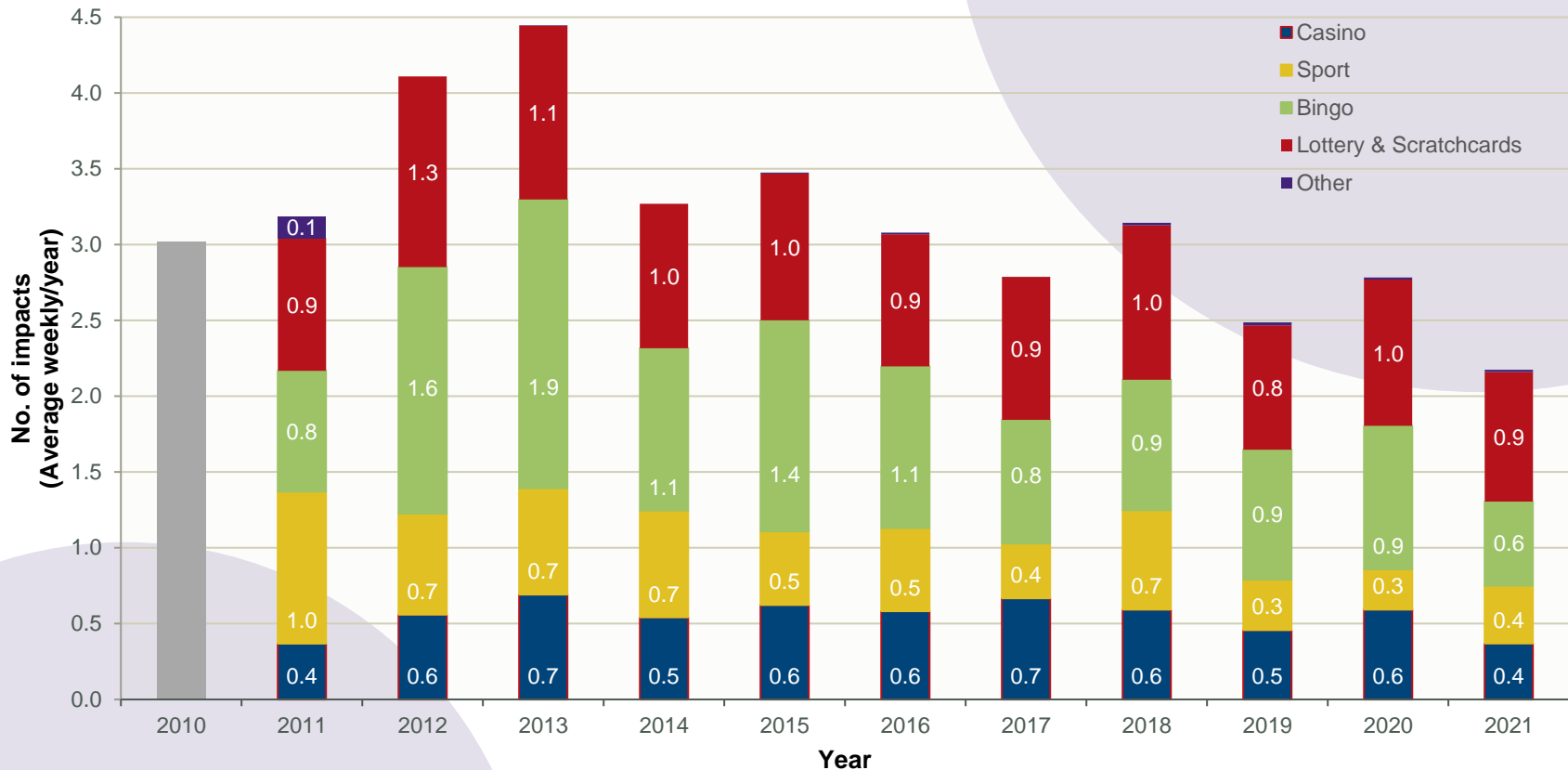
Children's exposure to alcohol ads as a percentage of adults' exposure



The majority of TV gambling ads seen by children in 2021 were for Lottery & Scratchcards and Bingo

- Since 2011* Lottery & Scratchcards and Bingo ads continue to comprise the majority of gambling ads seen by children.
- Exposure to ads for Bingo fell from a peak in 2013 to reach the lowest level in the 12-year reporting period in 2021.

Children's exposure to gambling ads – by product type



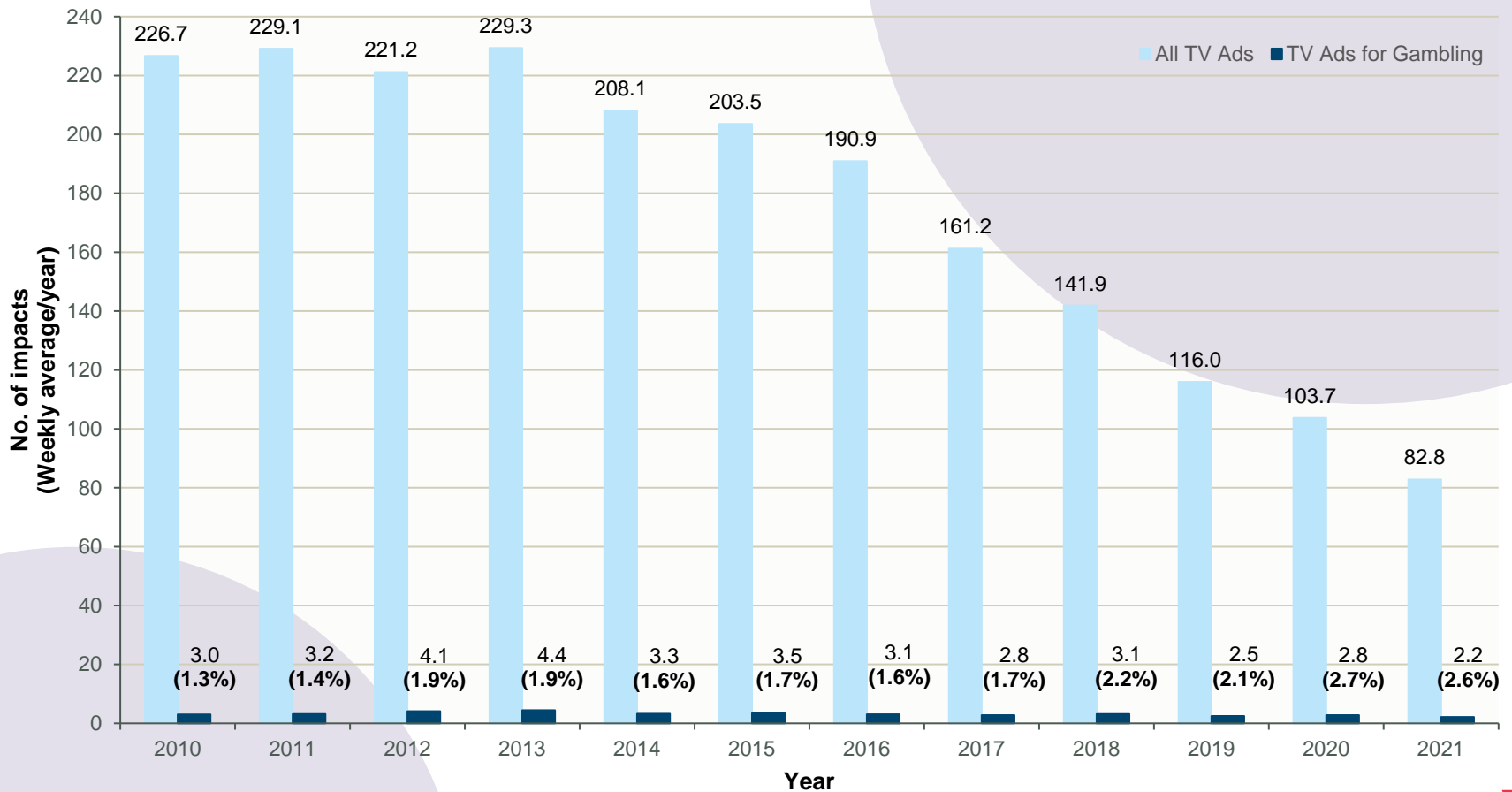
*Reporting of exposure data for different gambling product categories starts from 2011. As noted in previous ASA exposure reports, product classification data prior to 2011 does not permit a detailed breakdown of children's exposure to TV ads for Bingo, Lottery & Scratchcards etc..



Gambling ads made up 2.6% of all TV ads seen by children in 2021

- Gambling ads made up less than 2% of all the TV ads seen by children on average each year between 2010 and 2017. Since 2018 this percentage has remained above 2%, reaching 2.6% in 2021.
- Children's exposure to all TV ads fell by over 60% from a peak of 229.3 ads per week in 2013 to a low of 82.8 in 2021. Over the same period, children's exposure to gambling ads decreased by half. While children's exposure to gambling ads on TV has decreased since the 2013 peak, children's exposure to all TV ads has declined at a faster rate over the same period.

Children's exposure to Gambling TV ads as a percentage of exposure to all TV ads





Annex A:

How BARB data is analysed and presented in this report



How BARB data is analysed and presented in this report

Data source

- Ad exposure and viewing analysis presented is based on data reported by the Broadcasters' Audience Research Board (BARB).
- The data presented considers trends in ad exposure and viewing on broadcast television only and does not include viewing to Subscription Video-on-Demand (SVOD) services.

Analysis period

- The report calculates ad exposure to alcohol and gambling ads on TV on a weekly average basis for each year from 2010 to 2021.



How BARB data is analysed and presented in this report

Measurements

- The principle metric used in measuring ad exposure is **unweighted 'impacts'**.
 - An impact is an instance of advertising being viewed by a member of a demographic group, for example children aged 4-15. As the number of impacts reflects the number of views, 300 impacts could be one ad viewed 300 times, or 300 ads viewed once each, or any equivalent combination.
 - The analysis for adults' and children's exposure is presented as a weekly average per individual for a given year: the number of impacts divided by the number of adults or children in the UK (or constituent nation) for a particular week, averaged across the year.
 - Ad exposure data is reported as the average number of impacts per person. This is an important measure as it tells us, on average, how many times per week an average member of the demographic group is exposed to TV ads for the chosen category.



How BARB data is analysed and presented in this report

Other measures used in this report

- **Total ad impacts** – This measure indicates the number of times ads across all product categories are viewed. The number of total ad impacts in this report relates to children aged between 4-15 years, unless otherwise specified, and is presented as a weekly average per year.
- **Children's exposure as a percentage of adults' exposure** – The BCAP scheduling rules require advertising to be targeted away from children's channels or programming, and other programming where children are proportionally over-represented in the audience. This measure provides an insight into the efficiency of restrictions intended to appropriately limit children's exposure to ads for certain product categories. For example, if children's exposure as a percentage of adults' exposure to an ad for a particular product is 25%, it means that children see around one of those ads for every four seen by adults.
- **Children's exposure as a percentage of exposure to all TV ads** – This measure shows how much of all the TV ads seen by children are made up of ads in the particular category (alcohol or gambling) expressed as a percentage.



How BARB data is analysed and presented in this report

Audience demographics

- Adults – defined by BARB as aged 16+.
- Children – defined by BARB as aged 4-15 years; some additional analysis have been included to examine exposure levels across the UK for younger children, aged 4-9, and older children, aged 10-15.

Note: Exposure figures presented within this report have been rounded to one decimal place, unless stated otherwise. Any percentages set out related to increases and decreases in exposure levels, as well as total figures, in a given period are calculated based on unrounded impact figures for accuracy, and those percentages are then rounded to one decimal place when presented in the report. As such, readers may find a variance if calculating using the rounded figures within this report.

BARB data is continuously consolidated and finessed, and this may account for some minor discrepancies between some of the figures presented in this report and in previous reports.



Annex B: Further information

When considering the data presented in this report, readers should also refer to important contextual information set out in the ASA's [first exposure report](#), in particular the following:

- **BCAP's policy objectives and delegated statutory duties (page 5)**
- **Scheduling rules: determining 'particular appeal' of programmes (page 6)**
- **Q&A (page 35)**

BCAP guidance on [scheduling and audience indexing](#) aims to help broadcasters comply with the scheduling rules in Section 32 of the BCAP Code. It outlines a variety of approaches, which broadcasters might be expected by the ASA to follow as part of their scheduling policies. They ensure that those programmes that appeal particularly to children and young people are correctly identified, allowing broadcasters to place restrictions on the advertisements in the commercial breaks during and adjacent to them.



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