

# Children's exposure to age-restricted TV ads: 2018 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 57 years and the UK Code of Broadcast Advertising (written and maintained by the Broadcast Committee of Advertising Practice) for 15 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.

Following our [first report](#) published in February 2019 that looked at children's exposure to TV ads for alcohol, gambling and food and soft drink products high in fat, salt or sugar (HFSS products) over a number of years, this report provides an update on children's exposure to those TV ads in 2018.

### Some of the key findings are:

- **Alcohol ads:** Between 2008 and 2018, children's exposure to alcohol advertising on TV more than halved from an average of 2.8 ads per week in 2008 to 1.1 ads per week in 2018, having peaked in 2010 at an average of 3.2 ads per week. The average number of alcohol ads children saw in 2018 remains at a similar level to that observed in the three previous years.
- **Gambling ads:** Between 2008 and 2018, children's exposure to gambling ads increased by one ad per week, from an average in 2008 of 2.2 ads per week (the first full year in which ads for gaming and betting were allowed on TV) to 3.2 ads per week in 2018. Exposure levels in 2018 remain similar to those observed since 2014, after the 2013 peak of 4.4 ads per week.
- **Food and soft drinks ads:** Between 2008 and 2018, children's exposure to all TV ads for food and soft drink halved, from an average of 35.5 ads per week in 2008 to 17.8 ads per week in 2018.
- **HFSS food and drink product ads:** In 2016, children saw an average of 12.4 TV ads for HFSS products per week. In 2018, that figure fell by more than a third to 8.0 ads.
- **All TV ads:** Between 2008 and 2018, children's exposure to all TV ads decreased by 35.4%, from 219.5 ads per week in 2008 to 141.9 ads per week in 2018.
- The number of TV ads seen by children aged 4-15 years has continued to fall markedly since the peak in 2013, at an average of 229.3 ads per week, to an average of 141.9 ads per week in 2018; this represents a reduction of 38.1% between 2013 and 2018.

- Over the same period, children’s exposure to:
  - TV alcohol ads decreased by more than half;
  - TV gambling ads decreased by more than one quarter;
  - TV ads for food and soft drink decreased by one half.
- This suggests that children’s exposure to TV ads for alcohol, food and soft drink is falling at a faster rate than exposure to all TV ads. Gambling exposure has been more or less stable at a lower level since the 2013 peak, in contrast with the significant continued decline in exposure to all TV advertising over the same period.
- In 2016, children aged 4-15 saw, on average, 12.4 ads for HFSS products on TV per week. Children’s exposure to HFSS advertising continued to fall over the next two years to 8.0 ads per week in 2018, which constitutes a 36.1% reduction over the period. Just under three quarters of the reduction in children’s exposure to TV ads for HFSS products between 2016 and 2018 can be attributed to the decline in children’s exposure to all TV advertising during the same period.

The objective of the ASA’s reporting in this area is to look at children’s exposure, over a number of years, to TV ads for alcohol, gambling and food and soft drink products high in fat, salt or sugar (HFSS products); products that attract public policy considerations, including because of the products’ potential impact on children and young people. 2008 represents the first full year in which the gambling advertising rules were implemented and the year in which the rules on HFSS product ads were introduced. The choice of this starting point has implications for the patterns of audience exposure that are identified in this report; it is important to interpret their significance within the context of the parameters selected. The data indicates, however, that children’s exposure to TV ads for alcohol, gambling and food and soft drink products is trending downward in recent years. The available data on children’s exposure to TV ads for HFSS products (a sub-set of TV ads for food and soft drink products) is much more limited, but for reasons presented in this report, exposure rates to this category of ads also appear to be trending downwards in recent years.

### Scheduling rules: determining ‘particular appeal’ of programmes

Broadcasters are required to exclude age-restricted ads from being advertised in or adjacent to programmes commissioned for, principally directed at or likely to appeal particularly to audiences below the age of 18 or 16 (depending on the advertised product). It is usually straightforward for broadcasters to identify a programme commissioned for or principally directed at children by considering the intended audience of the programme at commissioning or acquisition stage. A clear example of this is programming included on a dedicated children’s channel. For most TV channels operating under an Ofcom licence the likelihood of a programme appealing particularly to children is determined by a process of ‘audience indexing’, which involves the use of Broadcasters’ Audience Research Board (BARB) data. Audience indexing helps to determine how likely a programme is to reach viewers in a particular age category, relative to the whole audience. The process allows these TV channels to identify a programme (or programme part in the case of long-form programming), before it is broadcast, that appeal disproportionately to children by reference to an age category index score for each programme. If an age group for example 4-15s, has an audience index of 100, it means that that group is proportionally represented in the programme audience in relation to its share of the total TV audience. An index of 120 means it is over-represented by 20%, which BCAP considers to be a sufficiently significant share of the audience to indicate that the programme is likely to have particular appeal to that age group. Therefore, TV channels that have access to BARB data are required to exclude age-

restricted ads that achieve an index of 120 or above for the relevant age group. For TV channels that do not use BARB data or where the audience size is likely to be too small to produce reliable audience composition forecasts, BCAP invites broadcasters to adopt a cautionary approach and draw on other data that is reasonably available to them to them. This is further explained in BCAP guidance on scheduling and audience indexing.

### References to 'children' and 'adults' in this report

The primary purpose of this report is to focus on children's exposure to TV ads for alcohol, gambling and food and soft drink products high in fat, salt or sugar (HFSS products). Where this report refers to 'children' generally, this captures the BARB age category of 4-15, unless specified otherwise, for example where the analysis further examines the exposure levels for younger children aged between 4-9 and older children aged between 10-15. References to 'adults' in this report cover BARB age categories of 16 years old and above.

### How BARB data is analysed and presented in this report

This report calculates exposure to TV ads for alcohol and gambling on an average weekly basis for each year from 2008 to 2018, giving a picture of trends over the last decade. The section on HFSS gives an overview of exposure levels for all food and soft drinks advertising, on an average weekly basis per year, from 2008 to 2018, as well as a further analysis into exposure levels for HFSS ads between 2016 and 2018 (for reasons set out on page 19), also on an average weekly basis.

2008 was the first full year when all gambling services could legally be advertised on television. Before then, TV ads for sports betting and online casino were prohibited. 2008 was also the year when Ofcom introduced into the BCAP Code scheduling restrictions for HFSS product ads. Alcohol advertising has been subject to a scheduling restriction since the audience indexing approach was adopted by the Independent Television Commission (ITC), a forerunner of Ofcom, in the mid-1990s.

BARB data measures exposure in terms of 'impacts' for the audience as a whole and groups within it, for example by age category, region or socio-economic status. An impact is an instance of advertising in a chosen category (alcohol, gambling or HFSS) 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 similar combination. The statistics for adults' and children's exposure in the sections that follow are the number of impacts divided by the number of adults or children in the UK at that point in time, averaged across the year.

This is an important measure as it tells us, on average, how many times per week an average child is exposed to TV ads for the chosen category, for each year. For ease of comparability, we have used this metric as the basis for all the data analysis in this report.

We are mindful that concern about children's exposure to age-restricted advertising relates both to the ads they receive (and the discrete messages those ads include) and the amount of time those ads (and the messages they include) take up in the schedule: to be as transparent as possible in our account of children's exposure to these categories of advertising, we report on the number of ads viewed and the length of time over which exposure took place. Readers will note that, at various points in the individual product category sections of the report, these two measures may fluctuate at different rates – the number of messages may go down while the amount of time goes up, or vice versa. The

variance is generally modest in scale. The average number of impacts (based on unweighted impacts) remains the principal metric used in this report, and the values denoting the number of seconds (calculated based on duration weighted impacts) are indicative of the likely length of exposure.

Other measures used in this report include:

- **Total ad impacts** – This measure indicates the number of times that all ads are viewed. The number of total ad impacts in this report relates to children aged between 4-15 years and is presented as a weekly average per year.

- **Children’s exposure as a percentage of adults’ exposure** – The BCAP scheduling rules result in advertising being targeted away from children’s channels or programming and other programming where they 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 for alcohol, gambling or HFSS, expressed as a percentage.

The youngest BARB age categories are 4-9, 10-15 and 4-15. Where this report refers to ‘children’ generally, this captures the BARB age category of 4-15, unless specified otherwise, for example where the analysis further examines the exposure levels for younger children aged between 4-9 and older children aged between 10-15. References to ‘adults’ in this report cover BARB age categories of 16 years old and above.

Exposure figures presented within this report have been rounded to one decimal place, unless set out 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 therefore there may be some minor discrepancies in some of the figures presented in this report and the first report.

When considering the data presented in this report, readers should also refer to important contextual information set out in our first exposure report, in particular the following:

- BCAP’s policy objectives and delegated statutory duties (page 5)
- Q&A (page 35)

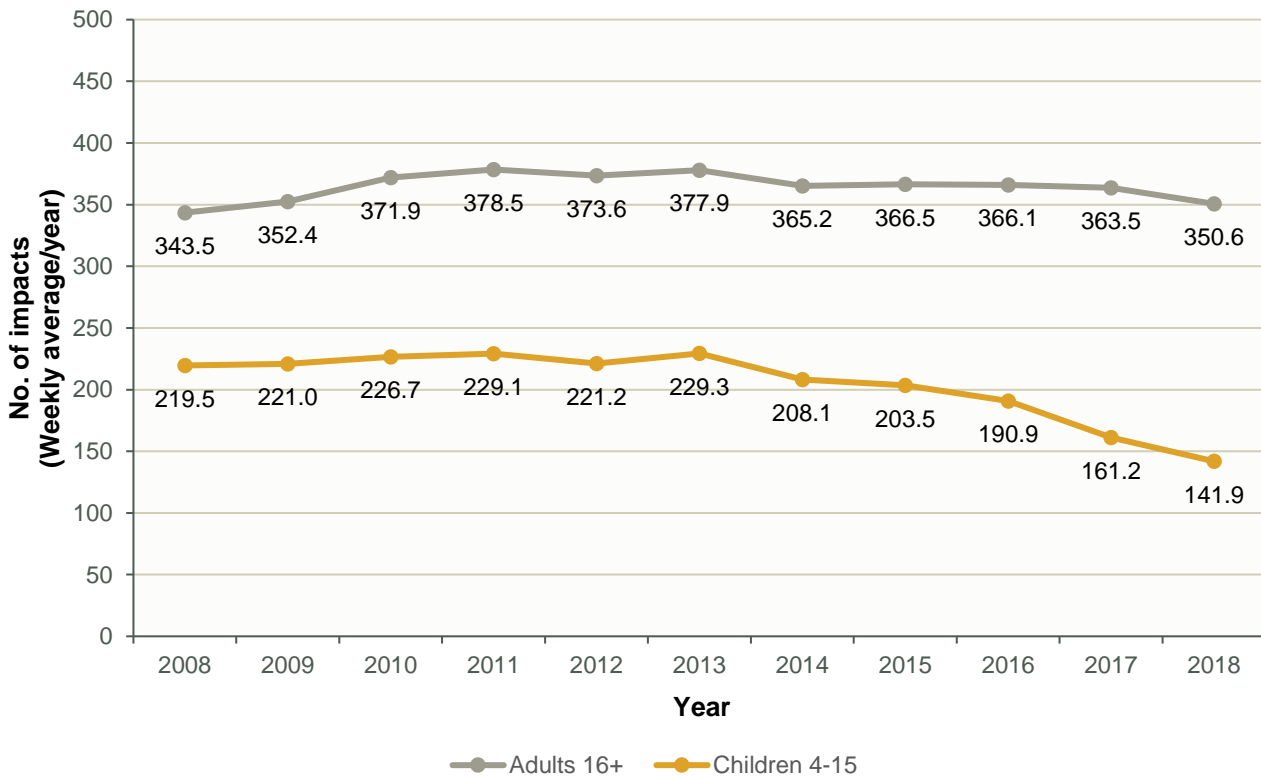
## Annual exposure to all TV ads

This data is intended to provide important contextual information to the product category-specific exposure data presented in the following sections of the report.

### Key findings:

- Between 2008 and 2018, children’s exposure to all TV ads decreased by 35.4%, from 219.5 ads per week in 2008 to 141.9 ads per week in 2018. Children’s exposure to all TV ads decreased from an average of 161.2 ads per week in 2017 to 141.9 ads per week in 2018.
- In 2018, children saw on average 141.9 TV ads per week, a reduction of 38.1% from a peak of 229.3 ads per week in 2013.
- In 2018, adults saw on average 350.6 TV ads per week, a reduction of 7.4% from a peak of 378.5 ads per week in 2011.
- Children’s total TV ad exposure, relative to adults’, has fallen from a peak of 63.9% in 2008 to 40.5% in 2018. That means children see, on average, two ads for every five ads seen by adults in 2018.

### Exposure levels to all TV ads – age groups



Overall, levels of adults’ exposure to advertising on TV have remained relatively stable over the period between 2008 and 2018; adults’ TV exposure increased marginally, by 2.1% (from an average of 343.5 ads per week to 350.6 ads per week). Notwithstanding the slow increase to a peak of, on average, 378.5 ads per week in 2011, adults’ exposure slowly decreased by

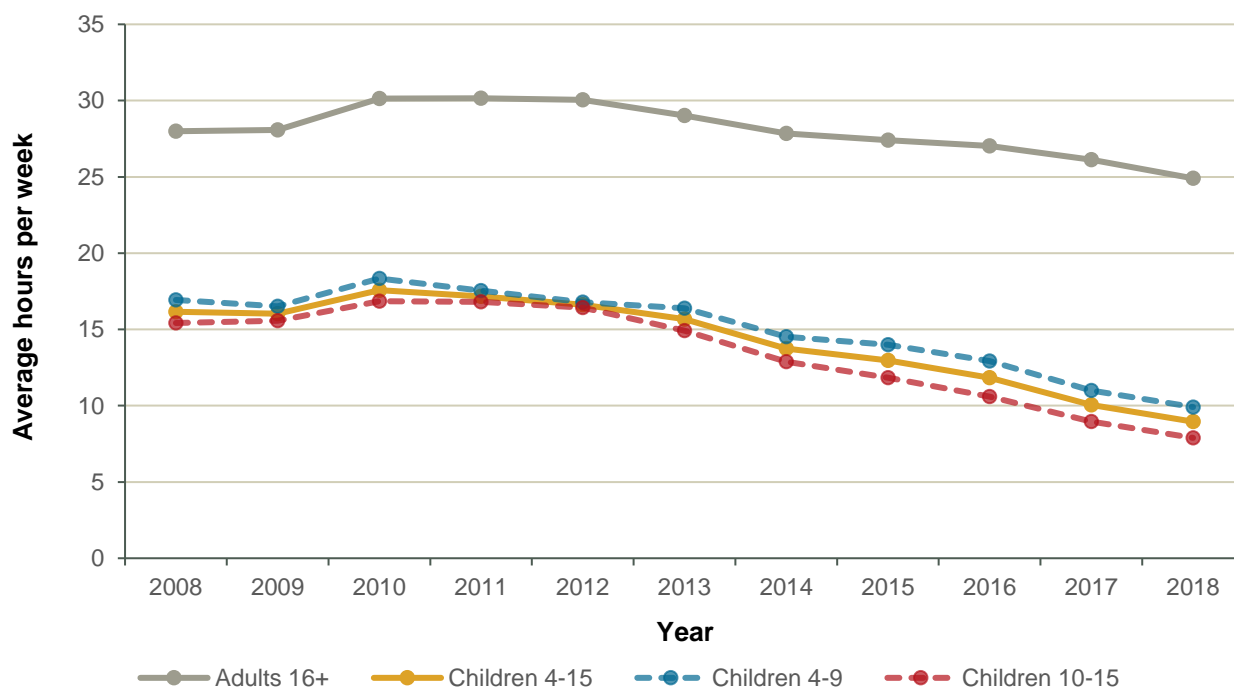


7.4% to 350.6 ads per week. The average number of ads that adults saw per week decreased from 363.5 ads in 2017 to 350.6 ads per week in 2018, which was similar to the level of exposure in 2009.

By comparison, between 2008 and 2018, children’s TV ad exposure reduced by 35.4% (from 219.5 ads to 141.9 ads per week). The number of TV ads seen by children aged 4-15 has continued to fall markedly since the peak in 2013, at an average of 229.3 ads per week, to an average of 141.9 ads per week in 2018; this represents a reduction by 38.1% between 2013 and 2018.

As noted in the [first ASA exposure report](#), the main driver behind the decline in children’s exposure to TV ads is their increasing use of online media, for example on-demand and online video content; time spent viewing live, scheduled broadcast television is decreasing. Analysis of BARB viewing data shows that in 2018, children watched an average of 9.0 hours

### Average hours of television viewing, 2010-2018

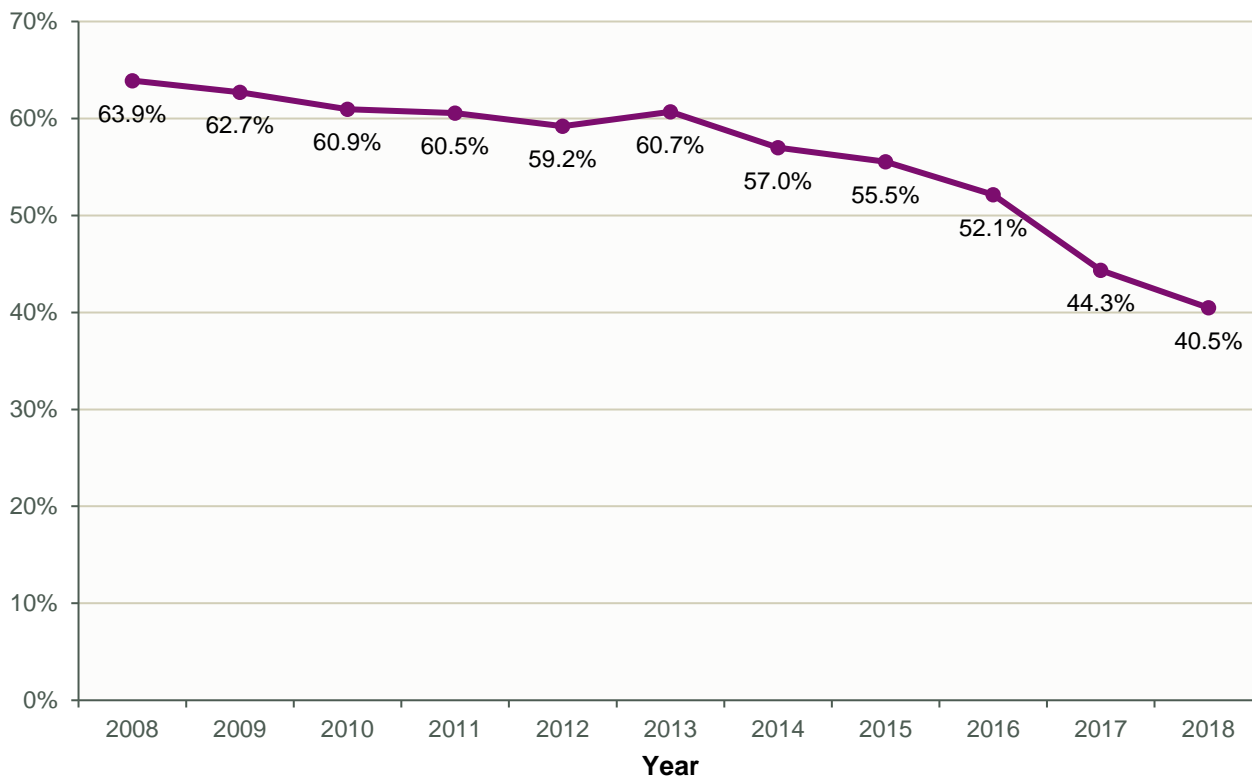


of television per week, down by one hour from 2017 and half of the viewing levels seen in 2010 (17.6 hours per week)<sup>1</sup>. Viewing levels are lower for older children aged 10-15, who viewed an average of 7.9 hours of television per week in 2018.

<sup>1</sup> In 2010, a new BARB panel was introduced and, as a result, data comparisons pre and post 2010 should be made with caution.



### Exposure to all TV ads – children’s exposure as a percentage of adults’ exposure



Children’s exposure to all TV ads, relative to adults’, continued to decrease from a peak of 63.9% in 2008 to 40.5% in 2018. This means that children saw, on average, two ads for every five ads seen by adults in 2018.

## 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*

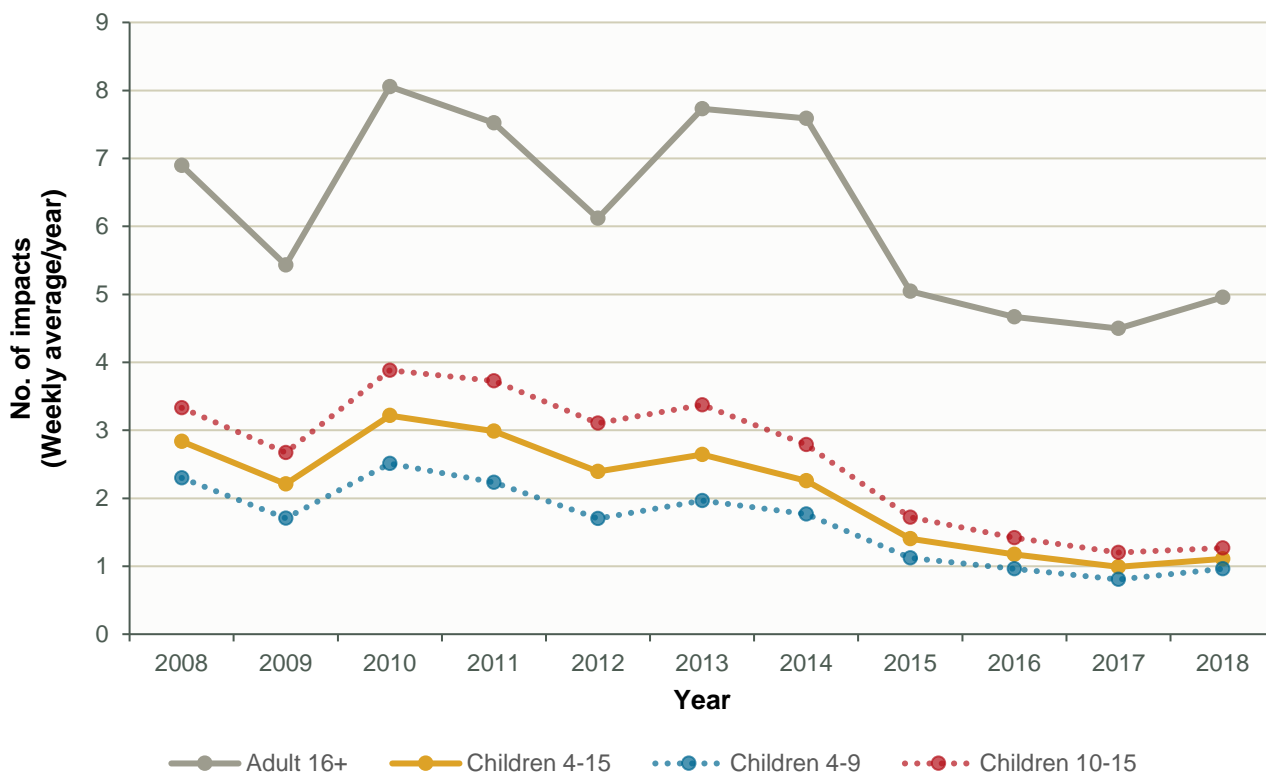
**32.4** *[The following products] may not be advertised in or adjacent to programmes commissioned for, principally directed at or likely to appeal particularly to persons below the age of 16:*

**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 2008 and 2018, children's exposure to alcohol advertising on TV more than halved from an average of 2.8 ads per week in 2008 to 1.1 ads per week in 2018. The average number of alcohol ads children saw in 2018 remains at a similar level to that observed in the three previous years.
- In 2010, children's exposure to alcohol ads peaked at an average of 3.2 ads per week. The majority of TV ads for alcohol that children see are ads for beer, cider or perry.
- Children's exposure to alcohol ads, relative to adults, has fallen from a peak of 41.1% in 2008 to 22.4% in 2018. That means children see, on average, about one TV ad for alcohol for every four or five seen by adults in 2018.
- Alcohol ads made up less than 1.5% of all TV ads seen by children annually over the 11-year period.
- Children's exposure to all TV ads fell by over a third from a peak of 229.3 ads in 2013 to a low of 141.9 ads in 2018 - over the same period, children's exposure to alcohol ads more than halved. This suggests children's exposure to alcohol ads is falling at a faster rate than exposure to all TV ads.

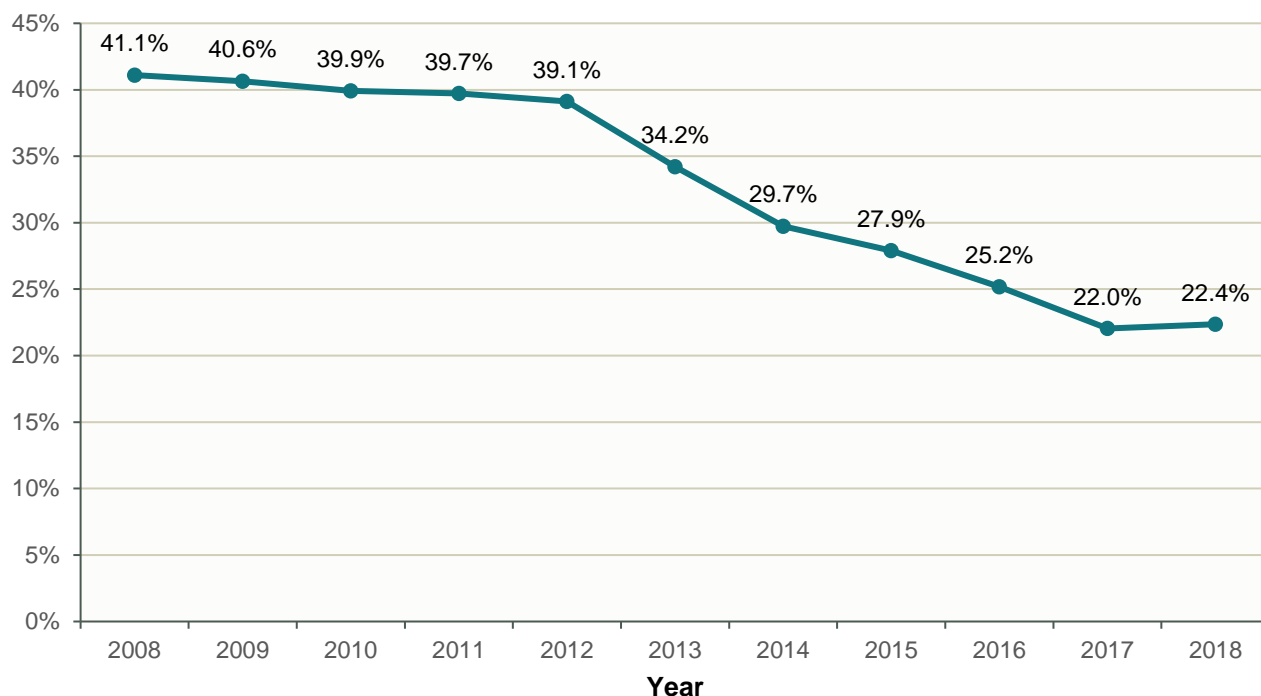
## Average weekly exposure per year – age groups



In 2008, children aged between 4-15 saw, on average, 2.8 alcohol ads (approx. 75.5 seconds) on TV per week. In 2018, children within this age group saw, on average, 1.1 alcohol ads (approx. 23.9 seconds) per week. This represents a decrease in exposure of more than half over an 11-year period. Over the period from 2010 (when alcohol ad exposure was 3.2 ads per week, at its highest) to 2018, children’s average weekly exposure reduced by around two thirds. The average number of alcohol ads children saw in 2018 remains at a similar level to that observed during the three previous years.

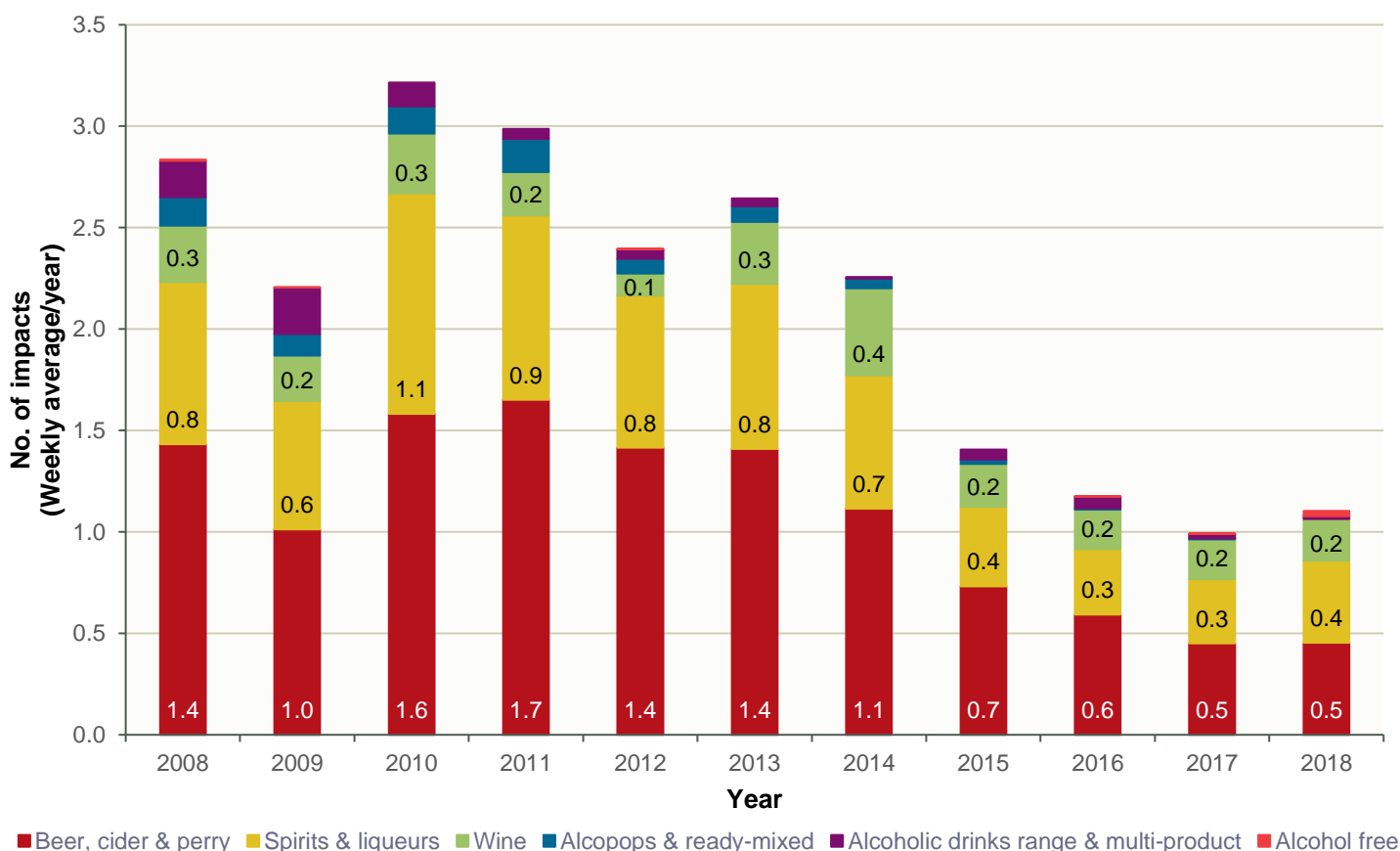
For younger children between 4-9 years old, the number of alcohol ads they saw on average each week stood at 1.0 ad per week in 2018, compared with 0.8 ads in 2017. For older children aged between 10-15 years, this figure stood at 1.3 ads per week in 2018. By comparison, adults’ exposure increased from an average of 4.5 ads per week in 2017 to 5.0 ads per week in 2018 (the same level as in 2015).

## Children’s exposure as a percentage of adults’ exposure



In 2017, children’s exposure to alcohol ads, relative to adults, reached its lowest level over the 11-year period since the peak at 41.1% in 2008 and remained at a similar level in 2018. This means that in 2018, children saw, on average, about one TV ad for alcohol per week for every four or five seen by adults in 2018.

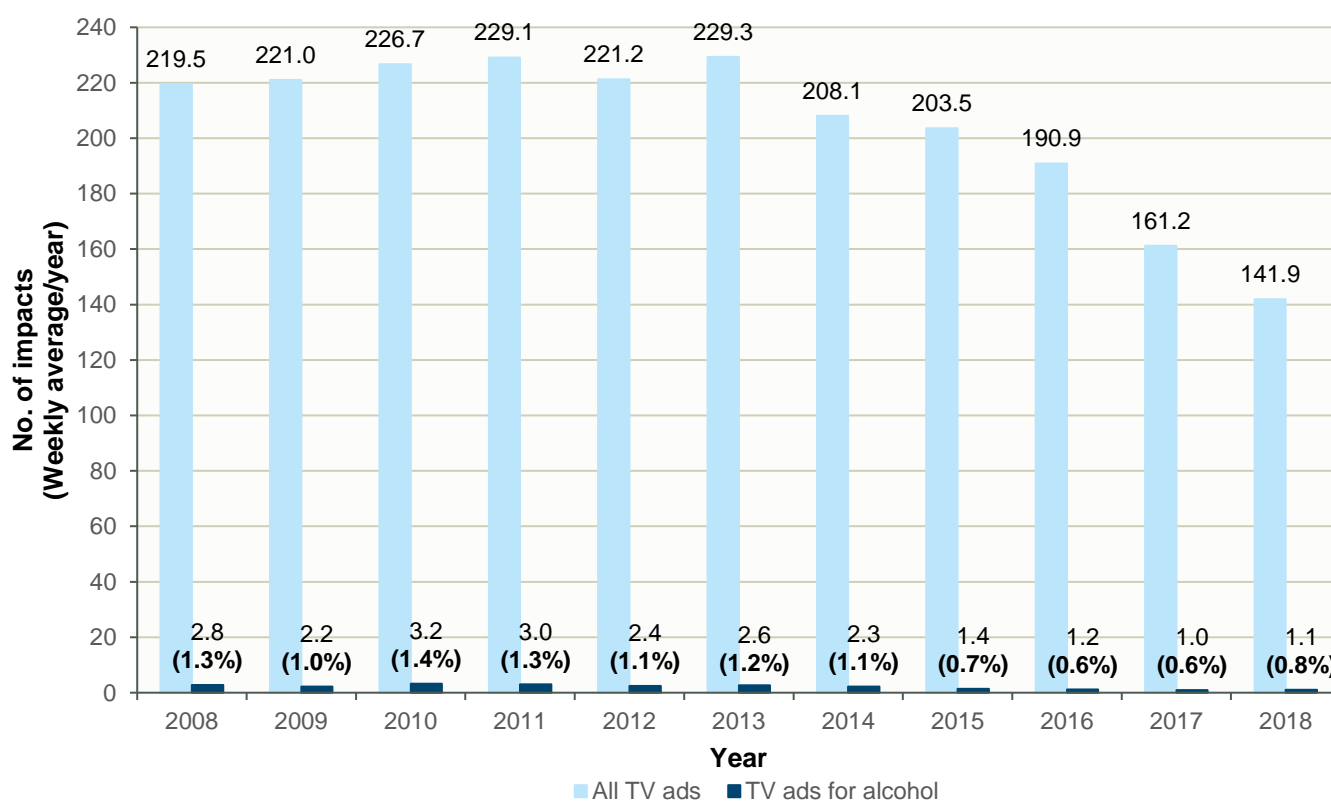
## Children’s exposure to alcohol ads – proportion of product types



The majority of TV ads for alcohol that children saw on average each week continued to be ads for beer, cider or perry in 2018, at an average of 0.5 ads per week. In terms of proportion, ads for these products continue to make up of around half of all alcohol ads seen by children over the period covered.

Ads for spirits and liqueurs still constitute the second largest proportion of all alcohol ads seen by children in 2018, at an average of 0.4 ads per week.

### Children’s exposure to alcohol ads as a percentage of exposure to all TV ads



In 2018, alcohol ads made up 0.8% of the number of all TV ads children saw on average each week – a similar proportion to that observed in the previous three years.

Children’s increasing use of online media is likely to have contributed to the continuing decline in their exposure to all TV ads. Children’s exposure to all TV ads fell by over a third from a peak of 229.3 ads in 2013 to a low of 141.9 ads in 2018 - over the same period, children’s exposure to alcohol ads more than halved. This suggests children’s exposure to alcohol ads is falling at a faster rate than exposure to all TV ads.

As noted in the previous ASA exposure report, the rules on scheduling restrictions for alcohol ads on TV have not changed over the years covered by the report. As such, other factors such as changes in marketing spend and behaviour, are likely to account for this outcome. However, the latest set of exposure data suggests that the scheduling rules continue to help appropriately limit children’s exposure to the extent that they prohibit alcohol ads from appearing in significant parts of the broadcast schedule.

## 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*

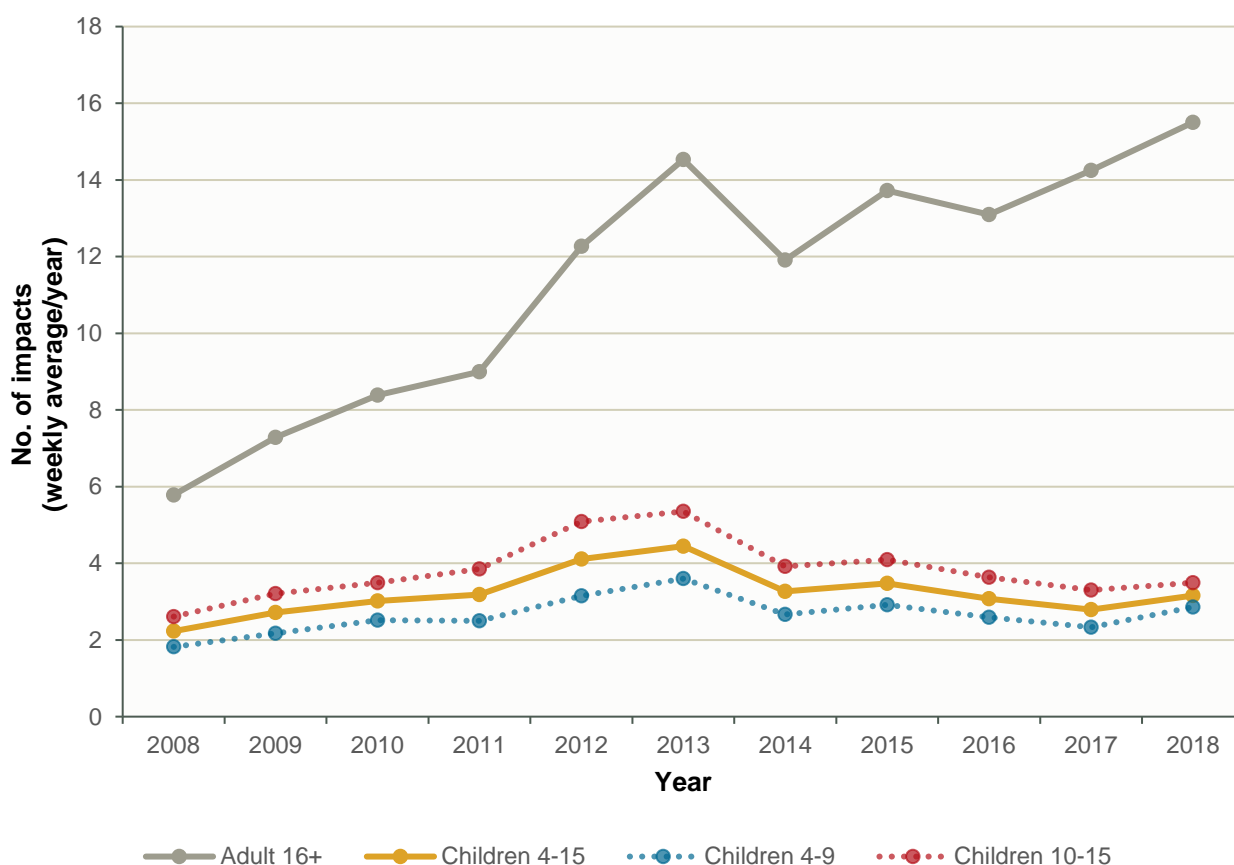
### Key findings:

- Between 2008 and 2018, children's exposure to gambling ads increased by one ad per week, from an average of 2.2 ads per week in 2008 (the first full year in which ads for gaming and betting were allowed on TV) to 3.2 ads per week in 2018. Exposure levels in 2018 remain similar to those observed since 2014, after the 2013 peak of 4.4 ads per week.
- Children's exposure to gambling ads, relative to adults', has fallen year-on-year from 38.6% in 2008 to 20.4% in 2018. That means children see, on average, about one TV ad for gambling for every five seen by adults in 2018.
- Gambling ads made up less than 2% of all the TV ads that children saw on average every year between 2008 and 2017. This rose to 2.2% in 2018.
- The majority of TV ads for gambling that children have seen since 2011 (the first year when we can be confident about product breakdown information for gambling ads) are ads for bingo, lotteries and scratchcards. For bingo ads on TV, children's exposure peaked in 2013 at an average of 1.9 ads per week, decreasing to 0.9 ads per week in 2018; for lottery and scratchcards on TV, children's exposure has remained around 1

ad per week over the period for which we have data. Children saw 1.0 ad per week for sports betting in 2011, but from 2012 to 2018 the average has remained below 1.

- Children’s exposure to all TV ads reduced by 38.1% from a peak of 229.3 ads per week in 2013 to a low of 141.9 ads in 2018. Over the same period, children’s exposure to gambling ads decreased by more than one quarter. While gambling exposure has been more or less stable at a lower level since the 2013 peak, there has been a significant continued decline in exposure to all advertising over the same period.

### Average weekly exposure per year – age groups

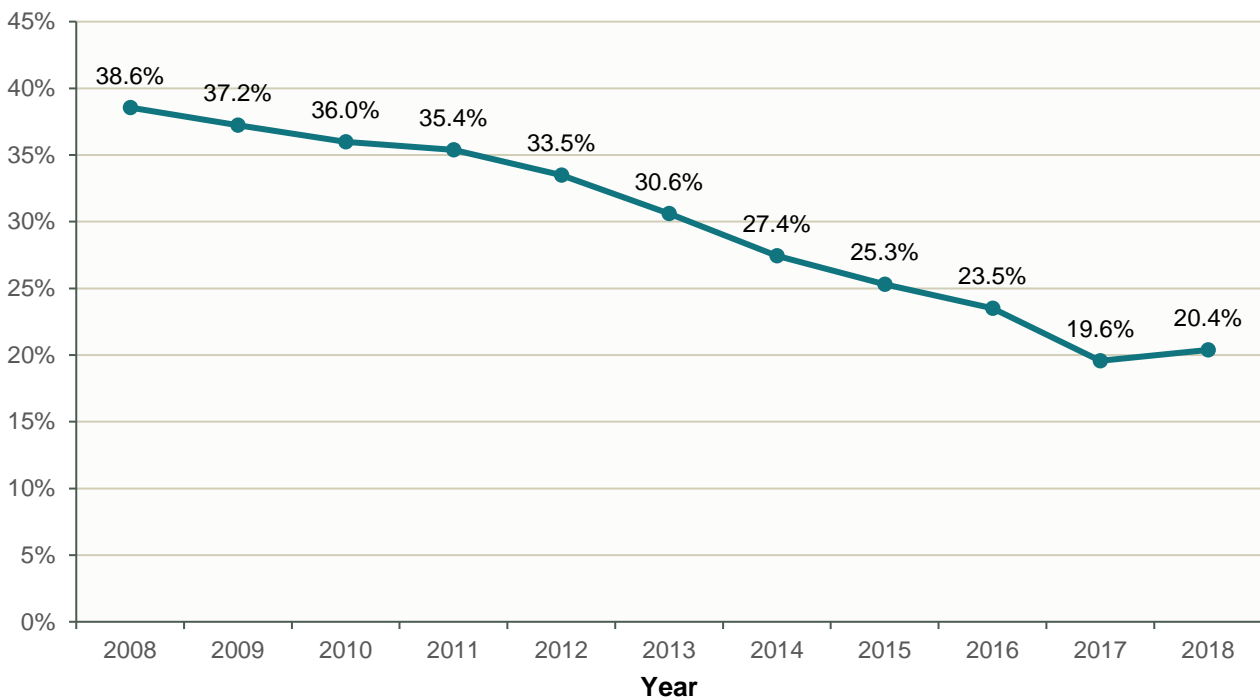


In 2008, children aged between 4-15 saw, on average, 2.2 gambling ads on TV per week (approx. 48 seconds). In 2018, children in the same age group saw, on average, 3.2 gambling ads per week (approx. 77.7 seconds). From 2014 to 2018, children’s exposure to gambling ads has remained around 3 ads per week, an increase of 1 ad per week compared with 2008. 2013 saw the highest level in children’s exposure to gambling ads at, on average, 4.4 ads per week (approx. 108.9 seconds) following a gradual increase since 2008 that was likely to be attributable to the relaxation of advertising controls resulting from the Gambling Act 2005.

Adults’ exposure increased from an average of 14.2 ads per week in 2017 to 15.5 ads per week in 2018.

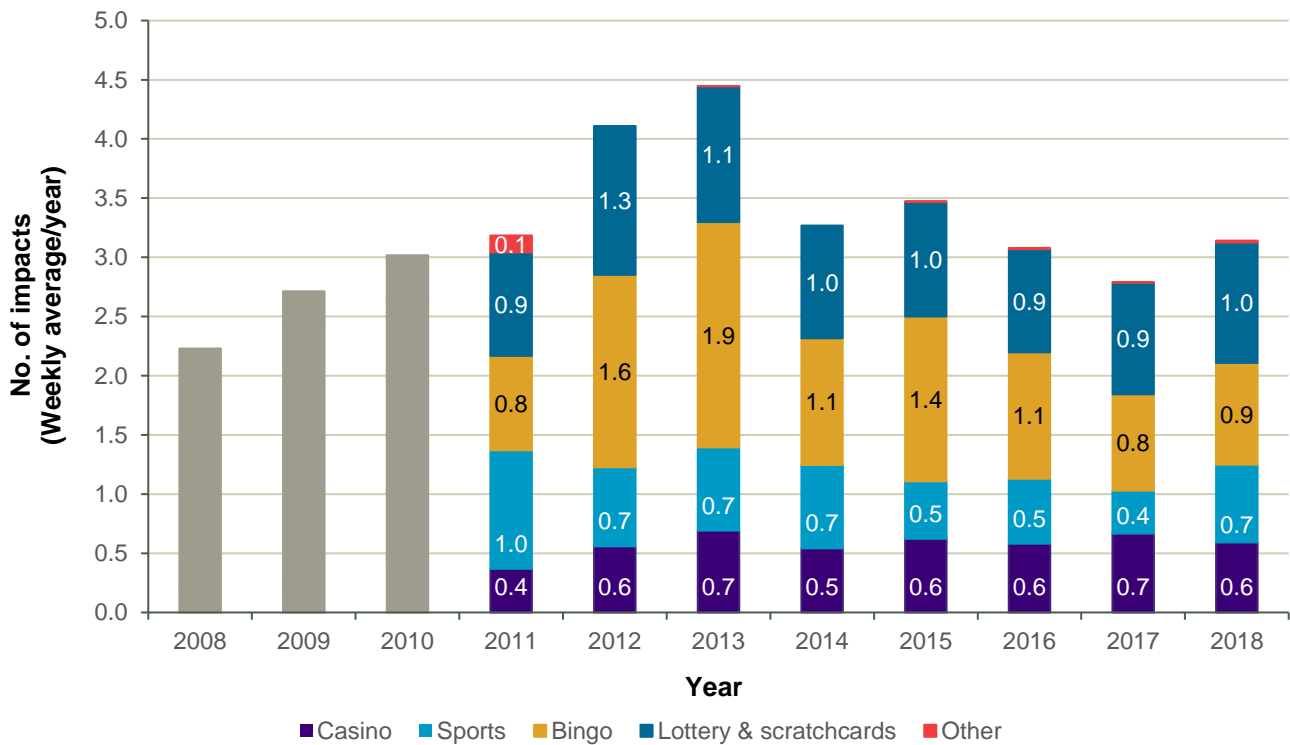


## Children’s exposure as a percentage of adults’ exposure



Following a steady year-on-year fall from 38.6% in 2008 to 19.6% in 2017, children’s exposure to gambling ads as a proportion of adult exposure saw a marginal increase in 2018. For the second year running, children saw, on average, about one TV ad for gambling for every five seen by adults in 2018.

## Children’s exposure to gambling ads – proportion of product types



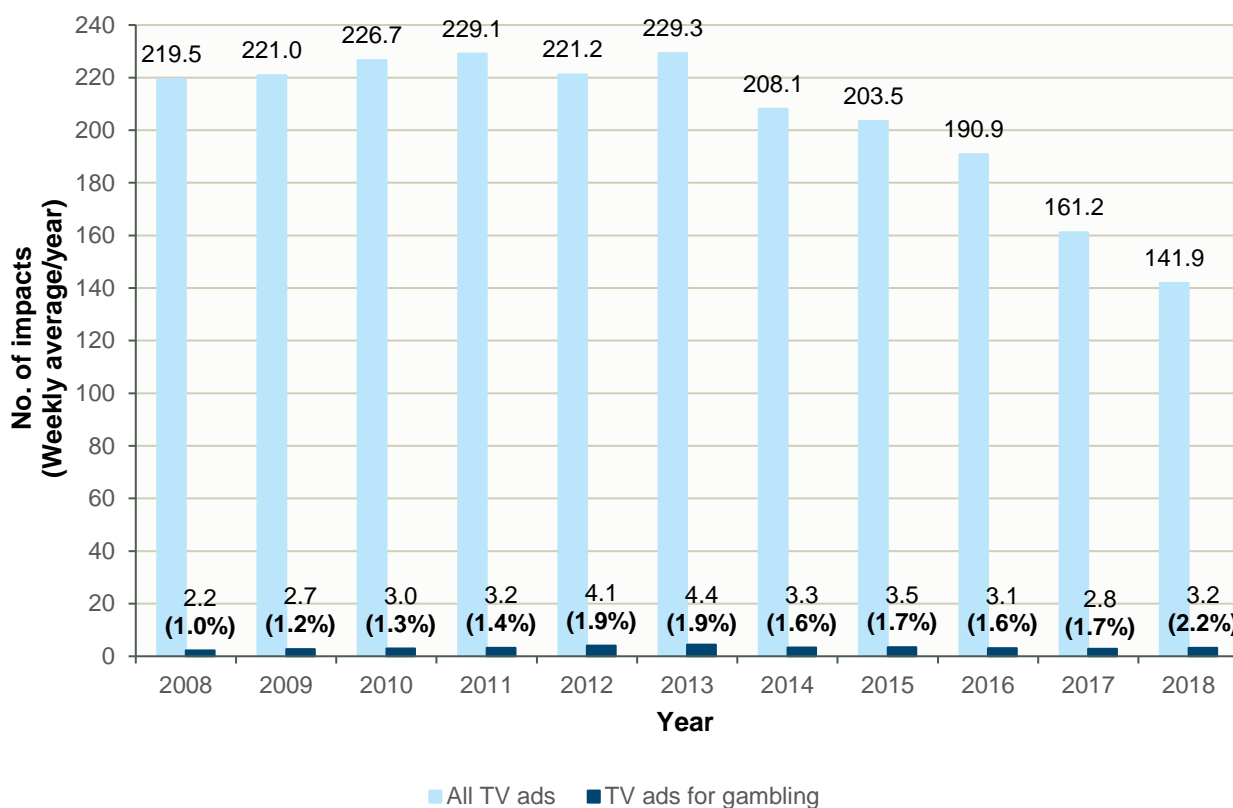
As noted in the previous exposure report, product classification data from 2008 to 2010 does not permit a detailed breakdown of children’s exposure to ads for bingo, lottery or

scratchcards on TV. Although the gambling product category breakdown starts in 2011, the total number of TV ad impacts for gambling as a whole is accurate for the period between 2008 and 2010.

Advertising for bingo, lottery and scratchcards combined continue to make up the majority of gambling ads that children saw since 2011. From 2011 to 2018, excluding the 2013 peak, children saw around 1 ad per week for bingo and 1 ad per week for lottery and scratchcards.

Children’s exposure to sports-related gambling ads was highest in 2011, at 1.0 ad per week, and lowest in 2017, at 0.4 ads per week. For the rest of the period between 2011 and 2018 exposure has remained below one ad per week, lower than for bingo, lottery and scratchcards. In 2018, children saw 0.7 sports betting ads per week.

### Children’s exposure as a percentage of exposure to all TV ads



Gambling ads have remained below 2% of all TV ads seen by children between 2008 and 2017. This percentage rose to 2.2% in 2018.

Children’s exposure to all TV ads reduced by 38.1% from a peak of 229.3 ads in 2013 to a low of 141.9 ads per week in 2018. Over the same period, children’s exposure to gambling ads decreased by more than one quarter. This indicates the rate of decline in children’s exposure to all TV ads between those years is now slightly greater than the rate of reduction of children’s exposure to gambling ads within the same period. As noted in the previous exposure report, the scheduling rules for gambling advertising on TV have not changed over the years covered by the report. Whilst other factors, for example changes in marketing spend and behaviour, are likely to have accounted for the reduction in children’s exposure to TV ads for gambling between 2013 and 2017, we are confident that the scheduling rules continue to help limit children’s exposure to the extent that they ban gambling ads in children’s programmes and programmes of particular appeal to under-18s. However, we will be closely

monitoring whether there will be notable changes, in particular any increases, in children's exposure to gambling ads on TV following the data presented in 2018.

## Exposure to TV ads for food and soft drinks high in fat, salt or sugar (HFSS products)

The BCAP Code rules state:

**32.5** *[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 16:*

**32.5.1** *food or drink products that are assessed as high in fat, salt or sugar (HFSS) in accordance with the nutrient profiling scheme published by the Food Standards Agency (FSA) on 6 December 2005. Information on the nutrient profiling scheme is now available on the Department of Health website.*

As stated in the first ASA exposure report, commercial databases that produce TV advertisement impact data do not currently differentiate HFSS products advertising from non-HFSS food and drinks advertising to the standards set out in the report. The ASA has again commissioned the same expert third party as in the first exposure data report, TRP Research (a BARB audience bureau), to generate and verify the data for the 2018 analysis. TRP's methodology in relation to the 2018 data can be found in Annex 1. Because of time and cost restraints associated with gathering data from previous years, the exposure data relating to HFSS advertising presented in this report will begin from the year 2016 up to 2018.

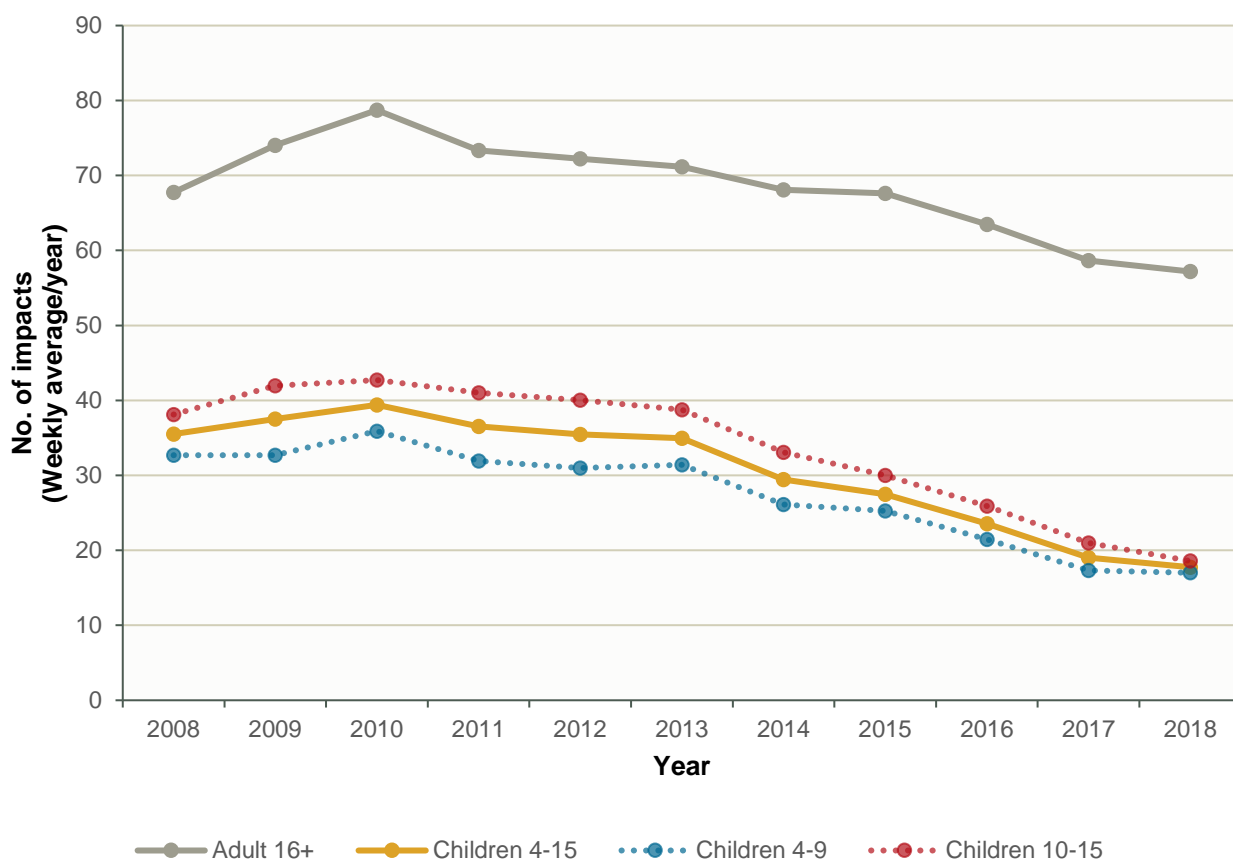
To provide further context, the report also presents exposure data for all food and soft drink advertising for the period from 2008 to 2018.

### Key findings

- Between 2008 and 2018, children's exposure to all TV ads for food and soft drink halved, from an average of 35.5 ads per week in 2008 to 17.8 ads per week in 2018.
- During the period covered by this report, children's exposure to all TV ads was at its highest in 2013, at 229.3 ads per week, and at its lowest in 2018, at 141.9 ads per week. From 2013 to 2018, children's exposure to TV ads for food and soft drink halved, suggesting that children's exposure to TV ads for food and soft drink is falling at a faster rate than their exposure to all TV ads.
- In 2016, children saw an average of 12.4 TV ads for HFSS products per week. In 2018, that figure fell by more than a third to 8.0 ads. Over the same period, children's exposure to all TV ads reduced by a quarter from an average of 190.9 ads per week to 141.9. This suggests that children's exposure to TV ads for HFSS products fell at a faster rate than their exposure to all TV ads over this three-year period.
- In 2016, children saw, on average, 1.4 more ads per week for HFSS products than non-HFSS products (12.4 ads and 11.1 ads, respectively). In 2018, children saw, on average, 1.9 more TV ads per week for non-HFSS products than for HFSS products (9.8 ads and 8.0 ads, respectively).
- Children's exposure to TV ads for HFSS products, relative to that of adults, was 29.6% in 2016, 25.7% in 2017 and 25.1% in 2018. This means that in 2018, children saw, on average, about one TV ad for HFSS products for every four seen by adults.

- In 2016, HFSS products ads made up 6.5% of all TV ads seen by children, 6.0% in 2017 and 5.6% in 2018.

### Average weekly exposure to all food and soft drink ads – age groups



Readers are first invited to consider contextual information relating to trends in audience exposure to TV advertising for all food and soft drink<sup>2</sup>. This also includes ads that have the effect of promoting a food or soft drink, such as ads promoting a restaurant, supermarket, food brand, etc. Further detailed analysis and commentary examining the HFSS product ads exposure data, and the relative proportions of HFSS product ads and non-HFSS food and drink ads, begin on page 22.

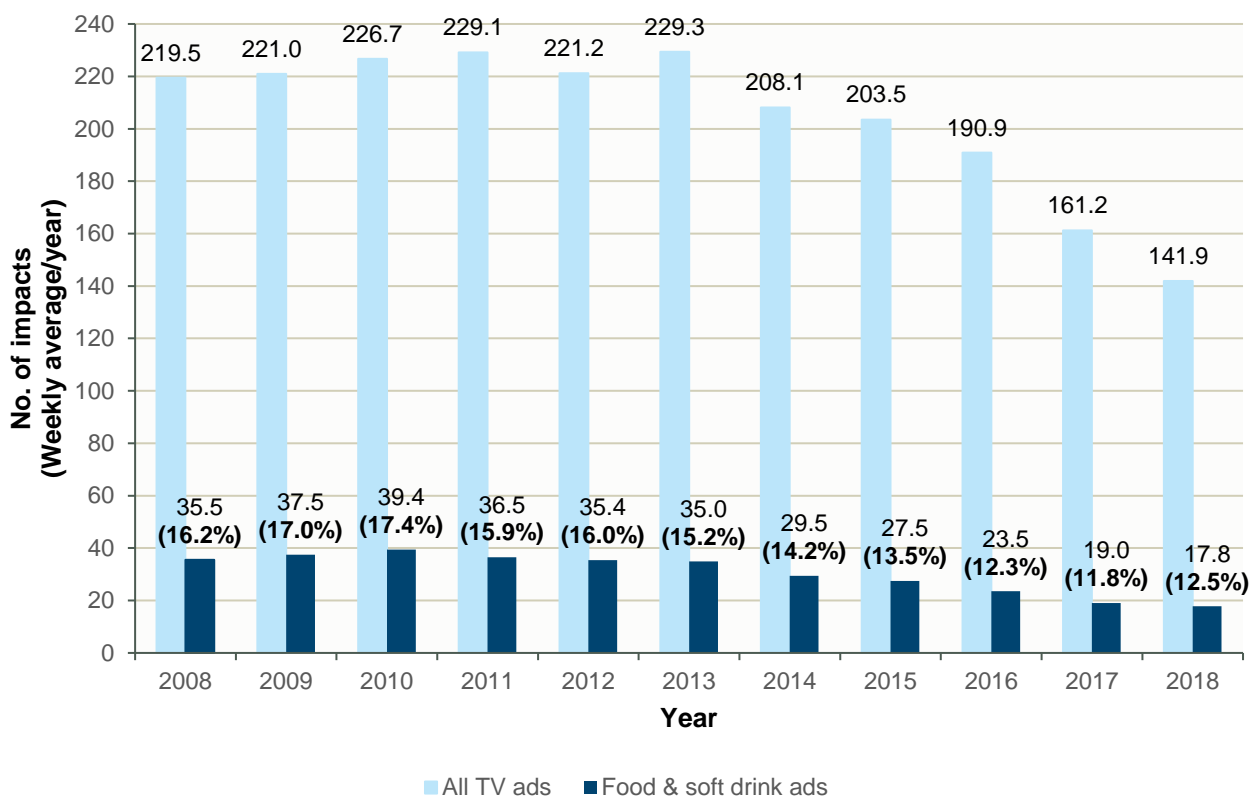
In 2008, children aged 4-15 saw, on average, 35.5 ads for all food and soft drink on TV per week (approx. 847.3 seconds). In 2018, children in the same age group saw, on average, 17.8 TV ads for food and soft drink per week (approx. 385.7 seconds). This represents a 50.0% reduction in children’s exposure to food and soft drink advertising between those

<sup>2</sup> Where this report comments on the levels of exposure to TV ads for all food and soft drinks covering the period between 2008 and 2018, the data for 2016-18 were based on the sum of exposure figures for non-HFSS product ads, HFSS product ads and ads in which no product had been identified for Nutrient Profiling Model (NPM) scoring, as validated by TRP. For 2008 to 2015, the report relies on publicly available data for BARB categories that fall within the definition of Food and Drink. It should be noted that during the validation process, it was found that some ads in 2016-18, which were identified as having the effect of promoting HFSS, did not fit within BARB categories that sought to capture Food or Drink products (exposure figures for these ads are included in the overall HFSS product ad exposure figures for 2016-18).

years. Within this period, children’s exposure to this category of advertising peaked in 2010 at an average of 39.4 ads per week (approx. 949.1 seconds) and fell steadily to 17.8 ads per week in 2018, which constitutes a reduction of 54.9%. Over the same period between 2010 and 2018, children’s exposure to all TV ads declined by 37.4%.

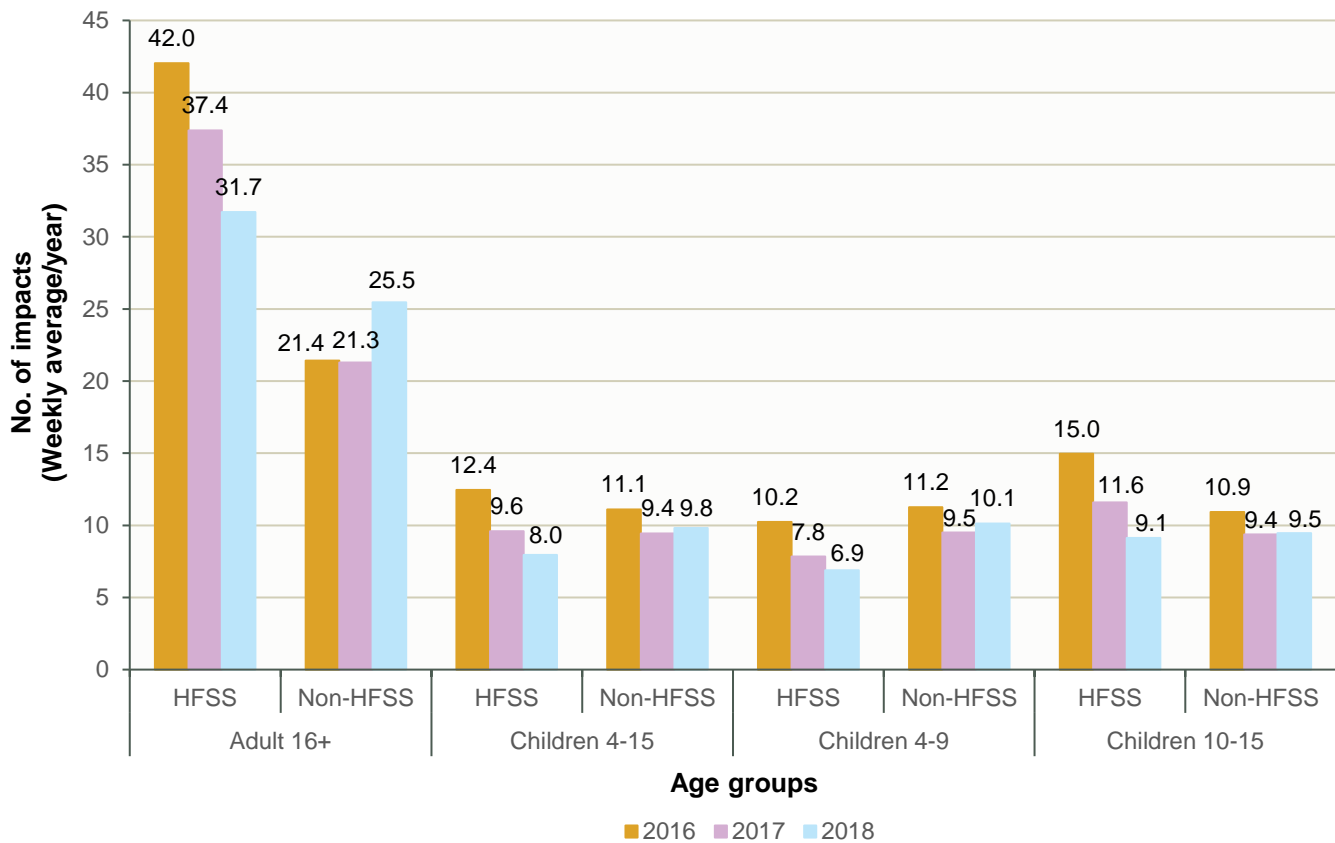
In 2008, adults’ exposure to TV ads for all food and soft drink was, on average, 67.7 ads per week. Adults’ exposure to this category of ads also peaked in 2010, at an average of 78.7 ads per week, and steadily declined to 57.2 ads per week in 2018. This meant that the number of food and soft drink TV ads that adults see, on average, per week reduced by 15.6% between 2008 and 2018, and by 27.3% from 2010 (when adults’ exposure was its peak) to 2018. Over the same period between 2010 and 2018, adults’ exposure to all TV ads declined by 5.7%.

**Children’s exposure as a percentage of exposure to all TV ads – all food and soft drink ads**



TV ads for all food and soft drink products remained below 18% of all TV ads seen by children per week over the 11-year period. In 2018, 12.5% of all ads seen by children were food and soft drink TV ads, which was the lowest over the 11-year period and a continuation of the downward trend from 2010.

## Exposure to HFSS product ads vs non-HFSS product ads in 2016-18 – age groups



Because of time and cost restraints associated with gathering data from previous years, HFSS TV advertising exposure data is only available from 2016. To provide some context to the measure of audience exposure to HFSS products ads on TV prior to 2016, Ofcom published its final review of the restrictions on TV ads for HFSS products in 2010, which estimated that between 2005 and 2009, children saw around 37% fewer ads for HFSS products<sup>3</sup>. The review also found that 58.9% of child impacts for TV ads for food and soft drink were for HFSS products and 41.1% for non-HFSS food and drink products. However, it must again be emphasised that a different methodology was used in Ofcom’s review and its findings should only be treated as contextual information in relation to the analysis presented in this report.

In 2016, children aged 4-15 saw, on average, 12.4 ads for HFSS products on TV per week (approx. 288.8 seconds)<sup>4</sup>. Children’s exposure to HFSS advertising continued to fall over the next two years to 8.0 ads per week in 2018 (approx. 172.6 seconds), which constitutes a 36.1% reduction over the period. For non-HFSS food and drink ads, children saw, on average, 11.1 ads (approx. 266.2 seconds) per week in 2016, which then decreased by 11.6% to 9.8 ads per week (approx. 213.1 seconds). In 2018, children saw on average more

<sup>3</sup> [https://www.ofcom.org.uk/data/assets/pdf\\_file/0024/31857/hfss-review-final.pdf](https://www.ofcom.org.uk/data/assets/pdf_file/0024/31857/hfss-review-final.pdf) p. 3

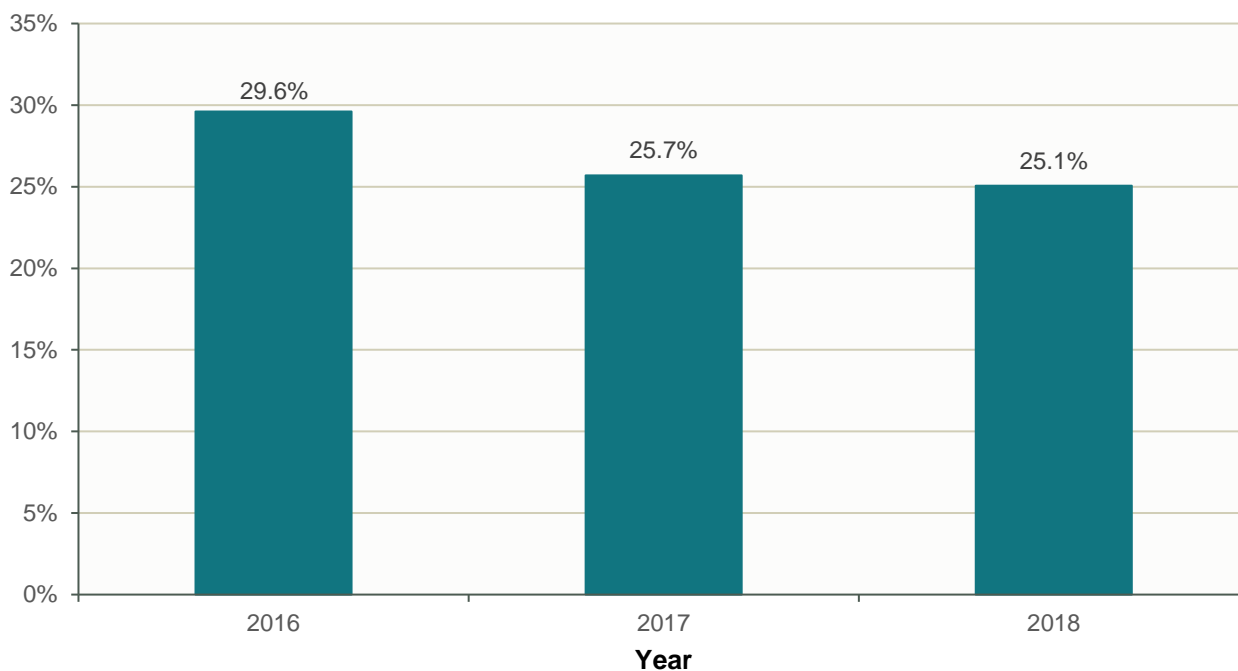
<sup>4</sup> The overall exposure figures for HFSS product ads for the years 2016-18 includes overall exposure figures for ads in which no product could be identified for NPM scoring by TRP. These ads are treated as HFSS product ads for the purpose of the report.



non-HFSS food and drink ads than HFSS products ads per week, in contrast to previous years.

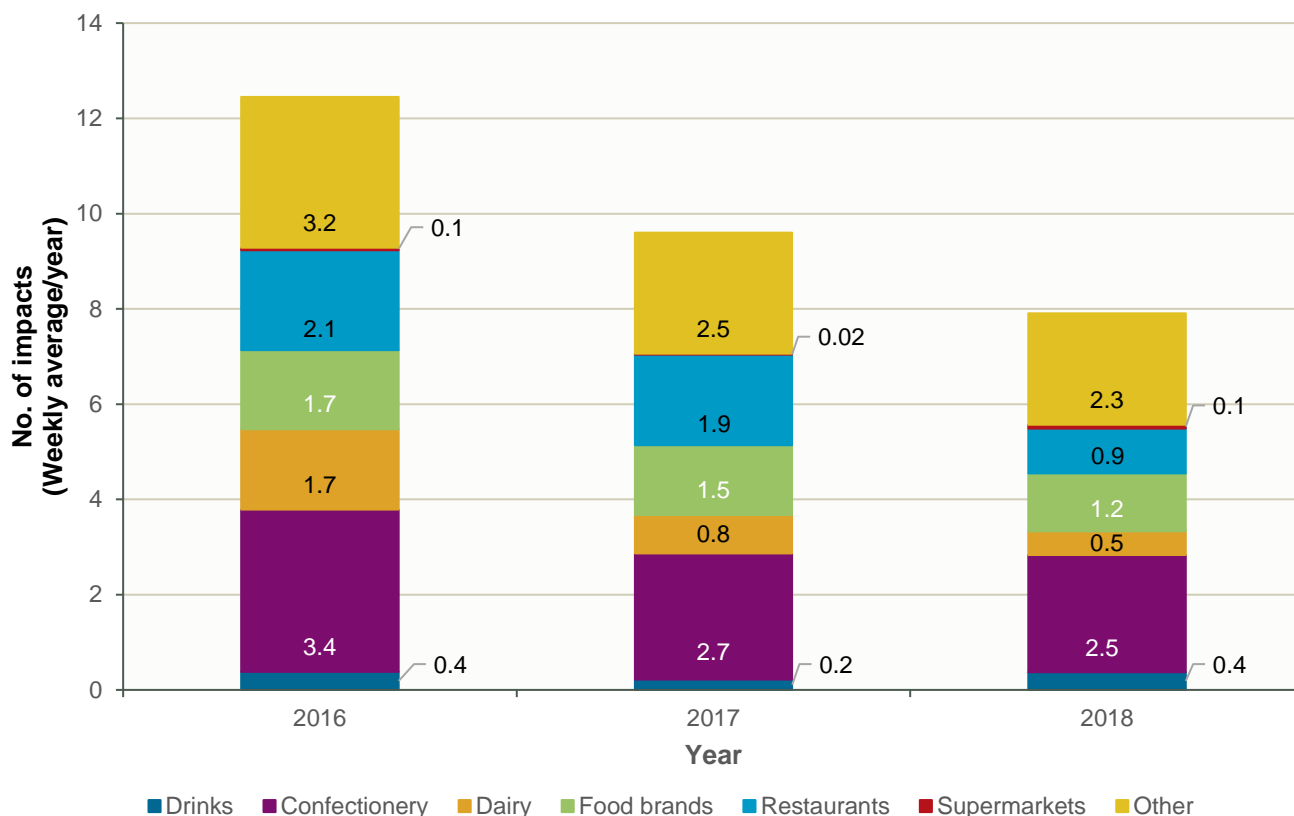
In 2016, adults' exposure to HFSS products advertising on TV was, on average, 42.0 ads per week. This also fell gradually over the next two years to 31.7 ads per week in 2018: a 24.5% reduction in adults' exposure. In contrast, adults' exposure to non-HFSS food and drink product ads rose from, on average, 21.4 ads per week in 2016 to 25.5 ads per week in 2018, which amounted to an 18.9% increase.

### Children's exposure to HFSS product ads as a percentage of adults' exposure



The percentage of children's exposure to HFSS product TV ads, relative to adults', fell from 29.6% in 2016 to 25.7% in 2017. This percentage further decreased, though marginally, to 25.1% in 2018. This means that children saw, on average, about one HFSS product ad for every four HFSS ads seen by adults in 2018.

## Children’s exposure to HFSS product ads – proportion of product types



HFSS products comprise a wide range of food and soft drink products, some of which may appeal more to particular age groups than others. For example, some HFSS confectionery goods may appeal more to children than to adults, while some products within the HFSS dairy, HFSS bakery and HFSS ready meal categories might have less appeal to children.

HFSS confectionery ads continue to make up the largest proportion of HFSS product ads seen by children over the three years measured, amounting to less than a third of all HFSS product ads seen by children in 2018. Children’s exposure to HFSS confectionery ads fell over the three-year period from 3.4 ads per week in 2016 to 2.5 ads per week in 2018.

The category of products – named ‘Other’ in the chart above – that continues to make up the second largest proportion of HFSS product ads seen by children consists of HFSS groceries, fish, ready meals, deli, frozen, ‘free from’ foods, bakery, etc.<sup>5</sup> In 2018, children saw, on average, 2.3 ads per week on TV for this group of products (less than a third of all HFSS product ads seen by children that year).

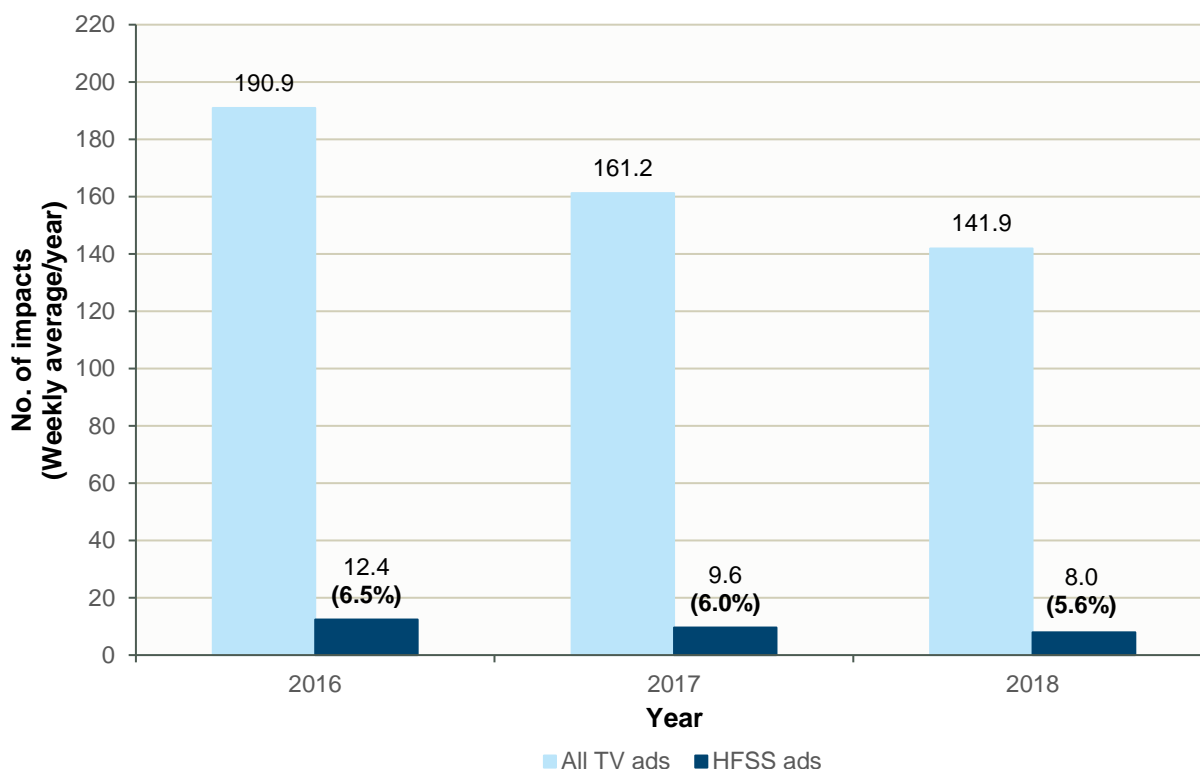
Food brand ads that have the effect of promoting an HFSS product made up the third largest proportion of HFSS product ads seen by children in 2018, at an average of 1.2 ads per week.

<sup>5</sup> The ‘Other’ category consists of ads for bakery; deli; fish; groceries; ‘free from’ products; frozen food; meat; ready meals; vegetables; fruit; baby & toddler and baby & toddler food ads which were identified as HFSS by TRP but fell within BARB categories that are not within the definition of food or drink; and ads in which no products were identified for NPM scoring but are treated as HFSS product ads for the purpose of the report (see footnote 4 on page 22).

This was followed by HFSS ads promoting restaurants (including takeaways), at an average of 0.9 ads per week.

Ads for HFSS drinks (including soft, sports, energy or health drinks) and supermarkets that have the effect of promoting an HFSS product continued to make up the smallest proportions of HFSS ads seen by children. In 2018, children’s exposure to HFSS ads for HFSS drinks was at an average of 0.4 ads per week and supermarket ads that have the effect of promoting HFSS ads at 0.1 ads per week.

### Children’s exposure as a percentage of exposure to all TV ads – HFSS product ads

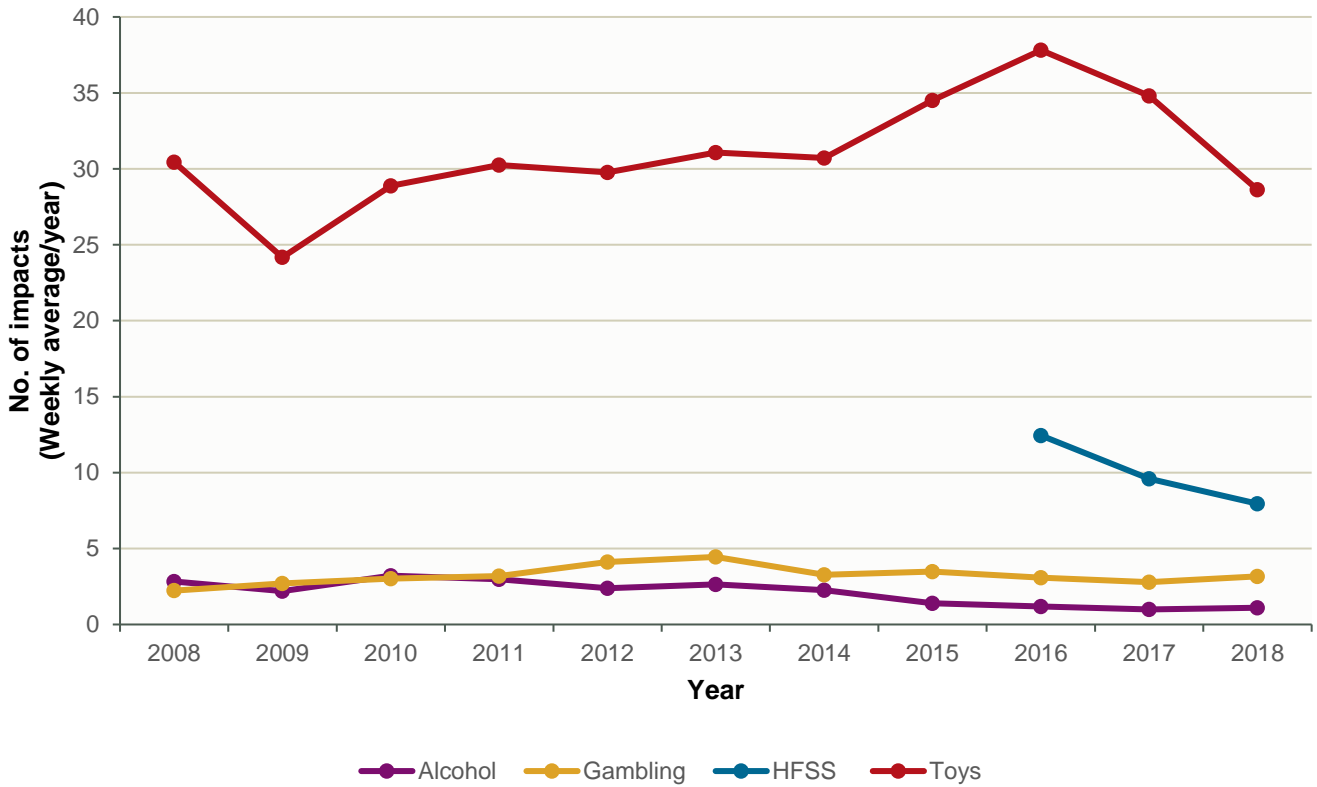


In 2016, the first year in which HFSS TV advertising exposure was measured in the report, HFSS product advertising made up 6.5% of all TV ads that children saw, on average, each week. This percentage further decreased over the next two years, down to 5.6 % in 2018. This constitutes nearly a one percentage point drop between 2016 and 2018.

In 2016, children saw an average of 12.4 TV ads for HFSS products per week. In 2018, that figure was 8.0 ads; a reduction of 36.1%. Over the same period, children’s exposure to all TV ads reduced by 25.7% from an average of 190.9 ads per week to 141.9. This suggests that children’s exposure to TV ads for HFSS products fell at a faster rate than their exposure to all TV ads over this three-year period.

## 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, gambling and HFSS, which are the subject of this report, and is provided for context.



Whilst the UK Code of Broadcast Advertising imposes restrictions on TV ads for alcohol, gambling and HFSS products from being scheduled in or adjacent to children’s programmes and programmes of particular appeal to them, no such restrictions are imposed on TV ads for toys. As illustrated by the chart, children’s exposure to toys ads on TV is significantly higher than their exposure to ads for alcohol, gambling and HFSS products ads. This indicates that high exposure levels can be achieved when advertisers can legitimately and specifically target child audience.


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## Appendix:

# Classification of High Fat, Sugar, and Salt Food and Drink Advertisements: 2018 Methodology

TRP Research carried out identification and classification of all food and soft drink ads aired on any channel in 2018 as a follow up to the classification which looked at ads from 2016 and 2017.

Where possible, the BARB advertiser and brand information was used to identify the product advertised. Where this was not possible, video logs were checked to verify both on-screen and audio product identification.

Using the list of identified products, the nutrient values for each was determined. Where it was available, Nielsen Brandbank nutritional data was used. Where it was not, the nutritional data was gathered from the advertiser's website. If no such data was available, a similar product was identified in McCance and Widdowson's The Composition of Food to produce an indicative nutritional composition.

Nutritional data was used to calculate Nutrient Profiling Model scores. Where an ad promoted multiple products, the highest scoring product was used to score the entire ad creative. Using the regulatory thresholds of 1 for drinks and 4 for foods, classifications of 'HFSS' or 'Non-HFSS' were applied. A third category of 'other' was used to identify advertisements where no product could be identified for NPM scoring purposes. As in the previous data set, all ad creatives classified as 'HFSS' or 'Other' were counted as HFSS in analysis.

Classification was further split, with '(NC)' added to any ad creatives that did not have a Clearcast code. In most cases, these appeared only on self-cleared channels.

Due the need for quick completion of this classification, TRP Research used previous years' results to give guidance on scoring and a 'lighter touch' approach was agreed for the methodology. In the earlier data set, 'grey area' ad creatives were flagged for further review by BCAP/ASA, particularly in cases where the creative cross-promoted a range of products or an overall brand message. For the current

data set, these were classified based on similar creatives from the previous data set or assigned the 'Other' classification. Where possible, regional ad creatives were classified in line with matching national ad creatives.

In order to calculate NPM scoring and final classification in this faster method, reviewers followed the previous year's methodology for product identification, matching on-screen products directly to Nielsen Brandbank data and/or McCance and Widdowson products. For supermarket basket comparison ads, reviewers recorded any presumed HFSS product (i.e., confectionary, ice cream, biscuits, crisps, pizza) and identified the ad creative type, but did not record more than five products per creative.

Additionally, the final product classification has been streamlined for supermarket ads. Where multiple products were shown, the ad creatives have been described as supermarket offers with notation as to whether HFSS products were visible during the creative.