



2013 Monitoring Report

March 2014



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Executive summary & Key results

Background

The EU Pledge is a voluntary initiative by leading food and beverage companies to change food and beverage advertising on TV, print and internet to children under the age of twelve in the EU.

Signatories commit to changing the way they advertise to children under 12 years old by respecting the two following requirements:

- No advertising of products to children under 12 years, except for products which fulfil specific nutrition criteria based on accepted scientific evidence and/or applicable national and international dietary guidelines¹.
- No communication related to products in primary schools, except where specifically requested by, or agreed with, the school administration for educational purposes.

This is the fifth annual monitoring report of the EU Pledge. The monitoring was carried out in the first half of 2013 by the following independent third parties:

- **Accenture Media Management**², to review EU Pledge member companies' compliance with the commitment relating to TV advertising;
- **EASA – The European Advertising Standards Alliance**, to review EU Pledge companies' branded websites, for compliance with the EU Pledge commitment.

This year, in addition to the monitoring of "traditional" TV advertising, which has been the object of monitoring since the first report of the EU Pledge, in 2009, the compliance monitoring focused on company-owned websites.

Due to resource constraints, members decided to suspend the monitoring of the EU Pledge commitment in primary schools in 2013, in order to be able allocate sufficient resources for this exercise. In previous years, the monitoring of the EU Pledge commitment in primary schools always highlighted compliance rates nearing 100%.

The methodology and process of the monitoring of company-owned websites was reviewed by Dr Verónica Donoso, post-doctoral researcher at the Interdisciplinary Centre for Law and ICT (ICRI), KU Leuven, iMinds, and an independent consultant. Dr Donoso is highly experienced in research on children and young people's uses of new media and e-safety. She has worked on a number of European and Belgian projects, including the projects EU Kids Online I, II and III. She also coordinated the 2nd Assessment of the Safer Social Networking Principles for the EU.

¹ EU Pledge companies have developed company-specific nutritional guidelines on the basis of the most widely accepted national and international guidelines that exist (e.g. WHO, FAO, USDA, IOM, EURODIET). They have done so individually to reflect the diversity of members' product portfolios. Some include products from a number of categories; others include only one category (e.g. confectionery, soft drinks). Other EU Pledge member companies still have taken the decision not to advertise any of their products to children under 12. All applicable nutritional guidelines are published as part of the individual company commitments under the EU Pledge on www.eu-pledge.eu. Common EU Pledge nutrition criteria – for those member companies that do use nutrition criteria – will enter into force across the EU as of 1 January 2015.

² Accenture is a global management consulting, technology services and outsourcing company. Accenture Media Management helps companies measure and optimise investments in marketing, media, retail and digital. It also provides independent media auditing services, which is the function it performs with regard to the EU Pledge.

Key 2013 results

The record of compliance is positive and consistent with previous years:

- **TV: The overall compliance rate is 98.1%**
- **Company websites: The overall compliance rate is 94%**

In addition to monitoring the implementation of commitments, EU Pledge member companies have sought to measure the change in the overall balance of their food and beverage TV advertising to children as a result of the EU Pledge and of companies' individual commitments.

For the fifth year running, monitoring confirms a downward trend in children's exposure to TV food advertising by EU Pledge member companies:

- A very substantial reduction in children's exposure to advertising for products that do not meet nutrition criteria through children's programmes (>35% <12 audiences): -83% this year. Over all markets monitored in the past 5 years the average is -82%
- A reduction in children's exposure to advertising for products that do not meet nutrition criteria in all programmes: -44% this year. Over all markets monitored in the past 5 years the average is -47%.
- An overall reduction in children's exposure to advertising for all EU Pledge member companies' products (regardless of nutrition criteria): -37% this year. Over all markets monitored in the past 5 years the average is -31%.

For the second time since the extension of the EU Pledge commitment to company-owned websites at the end of 2011, EASA - The European Advertising Standards Alliance, monitored member companies' brand websites. 343 national brand websites were monitored in ten EU countries. The results show that:

- **94% of websites reviewed were deemed compliant with the EU Pledge. 22 websites out of 343 were found non-compliant with the EU Pledge commitment**

EU Pledge nutrition criteria: Adoption of common criteria for companies advertising to children under 12

At the end of 2012, the EU Pledge was further strengthened through the adoption of harmonised nutrition criteria for those companies that so far have used company-specific criteria to determine what foods they may choose to advertise to children under 12.

By the end of 2014, these criteria – which are overall more stringent than criteria used to date - will replace individual company criteria applied until now. The common criteria set energy caps, maximum thresholds for nutrients to limit (salt, saturated fat and sugar) and minimum requirements for positive nutrients, category by category.

EU Pledge member companies that do not advertise any of their products to children under 12 at all will maintain their current policies. Therefore, the common nutrition criteria will not be relevant for them.

Growth in membership

The EU Pledge was launched in December 2007 by eleven leading food and beverage companies, representing approximately two-thirds of food and non-alcoholic beverage advertising spend in the European Union.

The initiative gained seven new members in 2010, as the European Snacks Association (ESA) joined as an associate member, with seven of its leading corporate members. One of these, Procter & Gamble, has since sold its single food brand, Pringles, to Kellogg's, a founding member of the EU Pledge. Two additional leading companies joined the initiative as a result of their acquisition by existing EU Pledge member companies: Wrigley through its acquisition by Mars Inc. in 2009; and Cadbury through its acquisition by Mondelez (Kraft Foods) in 2010. McDonald's and Royal FrieslandCampina joined in 2012.

In October 2013, the Quick Group, one of the leading European quick service restaurant brands, joined the EU Pledge, bringing membership to 20 companies, representing over 80% of food and beverage advertising spend in the EU.

About the EU Pledge

The EU Pledge is a voluntary initiative by leading food and beverage companies to change food and beverage advertising to children under the age of twelve on TV, print and internet in the European Union.

The EU Pledge was launched in December 2007 as part of signatories' commitment to the European Union Platform for Action on Diet, Physical Activity and Health, the multi-stakeholder forum set up by the European Commission in 2005 to encourage stakeholders to take initiatives aimed at promoting healthy lifestyles in Europe. In the context of the EU Platform, the EU Pledge commitment is owned by the World Federation of Advertisers (WFA), which also supports the programme.

EU Pledge Members

The founding members of the EU Pledge are the following companies: Burger King, Coca-Cola, Danone, Ferrero, General Mills, Kellogg, Mars, Mondelez, Nestlé, PepsiCo and Unilever. The membership has since been expanded, representing today 20 leading food and beverage companies, accounting for over 80% of EU food and non-alcoholic beverage advertising spend.



The initiative is open to any food and beverage company active in Europe and willing to subscribe to the EU Pledge commitments.

The EU Pledge commitments

The EU Pledge is a framework initiative whereby signatories are committed to changing the way they advertise to children under 12 years old by respecting the two following requirements:

- **No advertising of products to children under 12 years, except for products which fulfil specific nutrition criteria based on accepted scientific evidence and/or applicable national and international dietary guidelines³.**

For the purpose of this initiative, “advertising to children under 12 years” means advertising to media audiences with a minimum of 35%⁴ of children under 12 years⁵.

- **No communication related to products in primary schools, except where specifically requested by, or agreed with, the school administration for educational purposes.**

Participating companies must all meet these criteria, but can go further. The framework EU Pledge commitments provide a common benchmark against which companies can jointly monitor and verify implementation.

Since the initiative was launched, all participating companies have made their individual corporate commitments within the framework of the EU Pledge programme. All founding member company commitments, published on the EU Pledge website (www.eu-pledge.eu), were implemented across the EU by 31 December 2008⁶. Members that joined the EU Pledge in 2010 implemented their commitments by the end of that year. Chips Group, which joined in April 2011, implemented the commitments by the end of 2011. McDonald’s and Friesland Campina implemented the commitments upon joining, in January and September 2012 respectively. The Quick Group, which joined in October 2013, applied the commitments by 1 January 2014 and was therefore not included in this year’s monitoring exercise.

To facilitate compliance with the EU Pledge commitments, member companies developed detailed implementation guidance, for all relevant staff in marketing, media planning and corporate affairs departments in all EU markets.

³ EU Pledge companies have developed company-specific nutritional guidelines on the basis of the most widely accepted national and international guidelines that exist (e.g. WHO, FAO, USDA, IOM, EURODIET). They have done so individually to reflect the diversity of members’ product portfolios. Some include products from a number of categories; others include only one category (e.g. confectionery, soft drinks). Other EU Pledge member companies still have taken the decision not to advertise any of their products to children under 12. All applicable nutritional guidelines are published as part of the individual company commitments under the EU Pledge on www.eu-pledge.eu. Common EU Pledge nutrition criteria – for those member companies that do use nutrition criteria – will enter into force across the EU as of 1 January 2015.

⁴ This is a commonly agreed benchmark to identify media with an audience composed of a majority of children under 12 years old. This method of audience indexing has been agreed as a pragmatic system to determine the applicability of advertising rules. Nevertheless, this is a minimum common benchmark for all EU Pledge member companies. For further detail see: www.eu-pledge.eu

⁵ The rationale for this threshold is the strong degree of academic consensus that by the age of 12 children develop their behaviour as consumers, effectively recognise advertising and are able to adopt critical attitudes towards it. Although children between the ages of 6 and 12 are believed to generally understand the persuasive intent of advertising, care should be taken because they may not have a fully developed critical understanding. For further information see: http://www.wfanet.org/pdf/adv_papers/when_is_a_child_a_child.pdf

⁶ In case of mergers or acquisitions, an agreed transition period is allowed for the implementation of measures taken under the EU Pledge.



Third-Party Monitoring

In line with the Terms of Reference of the EU Platform for Action on Diet, Physical Activity and Health, EU Pledge signatories are required to monitor and report on the implementation of their commitments. EU Pledge member companies have committed to carry out independent third-party compliance monitoring of the EU Pledge commitments.

This is the fifth such monitoring exercise. The 2009, 2010, 2011 and 2012 Monitoring Reports are available on www.eu-pledge.eu. In 2013, EU Pledge member companies commissioned the following independent third parties to monitor implementation of the EU Pledge commitments:

- **Accenture Media Management**⁷, to review EU Pledge member companies' compliance with the commitment relating to food and beverage advertising on TV.
- **EASA – The European Advertising Standards Alliance**⁸, to review EU Pledge companies' brand websites for compliance with the EU Pledge commitment.

The EASA monitoring programme was independently reviewed by Dr Veronica Donoso, a research fellow at the Catholic University Leuven (KUL) and a highly experienced researcher in the areas of children and young people's uses of new media and e-safety.

⁷ Accenture is a global management consulting, technology services and outsourcing company. Accenture Media Management helps companies measure and optimise investments in marketing, media, retail and digital. It also provides independent media auditing services, which is the function it performs with regard to the EU Pledge.

⁸ The [European Advertising Standards Alliance](http://www.easa.eu) brings together national advertising self-regulatory organisations in Europe. Based in Brussels, EASA is the European voice for advertising self-regulation.

Compliance Monitoring: TV advertising

Objective and Scope

Accenture Media Management was commissioned to carry out the independent monitoring of member companies' compliance with the following EU Pledge commitment:

"No advertising of products to children under 12 years, except for products which fulfil specific nutrition criteria based on accepted scientific evidence and/or applicable national and international dietary guidelines. For the purpose of this initiative, "advertising to children under 12 years" means advertising to media audiences with a minimum of 35% of children under 12 years."

This is the second monitoring exercise assessing the compliance of EU Pledge member companies with the enhanced commitment. Until the end of 2011, the audience threshold used was 50% children under 12. By lowering the audience threshold to 35% of children under 12 years, the EU Pledge commitment covers more media channels that have a significant child audience. This commitment entered into force on 1 January 2012.

For this exercise, six sample EU markets were chosen: **France, Germany, Hungary, Poland, Portugal and Spain**. The intent has been to cover a number of new markets each year, within the limits of data availability and affordability, so as to assess performance in as broad a sample of Member States as possible. Some markets have been covered repeatedly (Poland in all five years, France in 2009, 2011 and 2013, Germany in 2009, 2012 and 2013, Hungary in 2010, 2012 and 2013, Portugal in 2010, 2011, 2012 and 2013, and Spain in 2009, 2010 and 2013) in order to provide a benchmark.

Methodology

Accenture Media Management was commissioned to analyse national audience data in the sample markets over a full three-month period. This data is provided by official national TV audience measurement agencies. Viewing estimates are obtained from panels of television-owning private homes representing the viewing behaviour of households.

The data provides detailed statistics about advertising spots: advertiser, product, channel, programme, date and time of broadcast, estimated audience and demographic breakdown – typically including the segment 4-12 years of age. In Portugal the only available demographic segment is children aged 4-14. The implication is a likely overstatement of non-compliance in these markets with respect to the EU Pledge commitment.

On this basis, Accenture gathered and reviewed all advertising spots for products marketed by EU Pledge member companies, aired in the seven markets during the period 1 January to 31 March 2013 - 845,904 spots were reviewed.

Spots for products that do not meet EU Pledge companies' nutrition criteria, where applicable, were identified, on the basis of full product lists submitted by each member company for each market. For those member companies that do not apply nutrition criteria and do not advertise any products to children under twelve, all spots were included.



For all these spots, audience composition at the time of broadcast was analysed on the basis of national ratings data. This allowed Accenture to isolate ads aired at a time when more than 35% of the audience was composed of children under twelve years of age.

All spots for products that EU Pledge member companies have committed not to advertise to children under twelve, aired at times when the audience was composed of over 35% children under twelve, were deemed non-compliant with the EU Pledge.

Results

The overall compliance rate was as follows:

- **98.1% of signatories' TV advertising spots were compliant with the EU Pledge commitment**

The detailed compliance rates reported by Accenture per market can be found in the Accenture presentation included in this report.

This figure is comparable to those reported in previous years in different markets (2012 compliance rate: 98.3%).

Statistical anomalies and overstatement of non-compliance

It is worth noting that the vast majority of spots found technically non-compliant (i.e. achieving an under-twelve audience share above 35%, regardless of the time of broadcast and of the adjacent programme), only a few can be considered to be certainly in breach of the spirit of the EU Pledge commitment, i.e. broadcast in or around children's programmes as such.

Most spots included as non-compliant in this report are spots broadcast in or around general/adult programmes that were reported in national ratings data as displaying a share of children under 12 above 35%.

The reason for this discrepancy is that audience statistics for programmes and advertising spots with a small audience – included in these monitoring results – are not reliable: a small audience means a small sample of households, rendering the demographic analysis of the audience unreliable. For statistical reliability, marketers typically exclude advertising spots below 1 Gross Rating Point (GRP). GRPs are the measure of television ratings. They are calculated in relation to the target audience – children under 12 for the purposes of this analysis. In this case a spot with less than 1 GRP is a spot that reaches less than 1% of the under-12 audience in the country in question. These spots often display an implausible share of under-12 viewers: e.g. a spot during a sports programme broadcast at 2AM shows a child audience of 100%. This is the result of statistical anomalies.

Accenture's analysis shows that if spots below 1 GRP (unreliable audience data) and night-time spots (clearly not targeted at children) are excluded, only 0.18% spots by EU Pledge member companies are non-compliant, as opposed to 1.9% if all spots are counted. All these cases were nonetheless included in the reported non-compliance rates for the sake of transparency and simplicity, even though they are, at worst, examples of "technical" non-compliance.



Follow-up

All instances of non-compliance were reported to the EU Pledge member companies concerned. Companies were thus able to identify each non-compliant spot by market, product, channel and time. This has allowed companies to take corrective action where necessary, to adapt media planning where appropriate, and to update guidance to marketing departments where needed.

Beyond compliance: Measuring Change in the Balance of Advertising

Objective and scope

In an effort to go beyond the assessment of compliance with their commitments, EU Pledge member companies have sought to measure the change in the balance of food and beverage products advertised to children under twelve, in order to assess the impact of the initiative and corporate policies implemented in the framework and spirit of the initiative.

The year 2005 was chosen as a benchmark, coinciding with the launch of the EU Platform for Action on Diet, Physical Activity and Health.

Methodology

The outcome indicator used to measure the change in the balance of food advertising to children was the number of times that children under 12 years old saw ads by EU Pledge member companies, for products that do not meet companies' nutrition criteria and for all EU Pledge company products, in the period 1 January – 31 March 2005 vs. the same period in 2013. This was measured in "impacts", which is the statistical number of times each spot is viewed by one person and hence the most accurate measure of "exposure".

Accenture was asked to report the findings in terms of:

- Change in programmes with an audience composed of over 35% of children, the minimum common benchmark applied under the EU Pledge initiative.
- Change in general programming, i.e. all programmes aired during the monitoring periods in the seven markets during Q1 2005 and Q1 2013.

This analysis was carried out by contrasting two comparable sets of data:

- The advertising and ratings data already analysed to measure compliance in Q1 2013.
- The equivalent data for Q1 2005, i.e. all advertising spots for products marketed by EU Pledge member companies in that period on the same channels.

Outcome

The results reported by Accenture show a marked decline in children's exposure to ads for products that do not meet companies' nutrition criteria since 2005. This trend is visible on the basis of both change measurement parameters chosen, namely:

- **An 83% reduction in programmes with an audience composed of over 35% of children.**
- **A 44% reduction in all programmes on all channels at all times.**

For all EU Pledge member companies' advertising across all products, i.e. regardless of nutrition criteria, this represents, in the markets monitored:

- **A 37% reduction overall, i.e. in all programmes on all channels at all times.**

These figures appear to confirm the overall trend observed over five years of monitoring, of a significant decrease in children's exposure. The five year average observed (2009-2013) is as follows:

- **An 82% reduction in exposure to ads for products that do not meet nutrition criteria in programmes with an audience composed of over 35% of children.**
- **A 47% reduction in exposure to ads for products that do not meet nutrition criteria overall, i.e. in all programmes on all channels at all times.**
- **A 31% reduction in exposure to ads for all products, regardless of nutrition criteria, overall, i.e. in all programmes on all channels at all times.**

Compliance monitoring: Company-owned websites

In 2011, EU Pledge members decided to enhance their framework voluntary commitments by **improving the coverage of the commitment in the online sphere. Since its inception**, the EU Pledge commitment has applied to advertising on TV, print media and third-party internet advertising. As of 1 January 2012, **EU Pledge member companies have extended their commitment to company-owned websites.** By extending the coverage of the commitment to cover both third-party online advertising and brand websites, the EU Pledge covers online marketing comprehensively.

Methodology

EASA – the European Advertising Standards Alliance was commissioned to undertake the review of the compliance of EU Pledge branded websites with their commitment.

Compliance with the EU Pledge criteria is determined on the basis of whether:

- The website features marketing communications
- Such marketing communications promote food or beverage products, as opposed to a brand/corporate brand in general
- Such food and beverage products meet or do not meet EU Pledge companies' nutrition criteria
- Such marketing communications are designed to be targeted primarily at children under 12.

A methodology with a 'consumer-oriented approach' was drawn up by the EASA secretariat in collaboration with the EU Pledge Secretariat and the independent reviewer of this exercise, Dr Verónica Donoso.

National self-regulatory organisations for advertising (SROs) from ten countries (Belgium, France, Germany, Hungary, the Netherlands, Portugal, Poland, Romania, Spain and the UK) were asked to review a selection of EU Pledge member companies' national brand websites which promoted products not meeting the applicable nutrition criteria.

Each SRO was asked to review a total of 40 national brand websites including at least two websites per company, where available, in July and August 2013. They could review national brand websites as well as promotional websites set up by the companies, but not the main corporate websites as these are per definition more intended to inform the public rather than to provide services and entertainment, especially to children. The SRO in Poland reviewed 39 national brand websites while SROs in Belgium, Hungary, Portugal and the Netherlands reviewed 29 websites and the SRO in Romania 28.

When making their selection of websites to review, the SROs were requested to take into account products that are popular amongst children in their country. The reviewers were requested to check if the marketer-owned websites complied with the EU Pledge criteria, using a dedicated questionnaire and methodology developed by EASA, the EU Pledge secretariat and the independent reviewer Dr Verónica Donoso.

The reviewers noted whether a website contained features to screen the age of the website visitor. This element was, however, not considered as sufficient to ensure compliance if the marketing communications on the website were clearly designed to appeal primarily to children under 12.

The reviewers were asked to check whether the websites contained elements, such as games, animation, licensed characters and toys and to decide if these were in their view primarily designed for children under 12. Lastly, they had to judge if these elements, in conjunction with the overall creative execution of the website (i.e. simplicity of language, use of font size and typeface, use of colours etc.), were clearly intended to make the marketing communication(s) on the website primarily appealing to under-12s.

On the basis of the level of appeal of the creative execution to under-12s and the overall findings reported by the SROs, EASA determined the final compliance of the websites with the EU Pledge criteria.

Beyond EU Pledge compliance, self-regulation experts also flagged any item on a website that potentially breached either one or several of the following advertising codes or laws:

- ICC Framework for Responsible Food and Beverage Marketing Communications;
- Relevant advertising standards and national sectoral codes;
- Relevant advertising laws.

All reviews were performed by self-regulation experts from national SROs; whereas EASA ensured that the results were reported in a consistent manner.

Monitoring results

A total of 343 national brand websites were reviewed, all of which contained product promotion. Out of these 343 websites, 22 websites were found not to comply with EU Pledge criteria, as they were deemed to be designed to be of particular appeal to children under 12 and promoting products that did not meet the nutrition criteria of the EU Pledge member companies.

22 out of the 343 websites reviewed contained items that were in breach of advertising codes or relevant advertising laws. In total 28 problematic items were flagged by the SROs.

Overall, 94% of the websites reviewed were in compliance with the EU Pledge commitment

EU Pledge nutrition criteria: Implementing common criteria for companies advertising to children under 12

The EU Pledge is a voluntary initiative and as such, it is able to respond promptly to new challenges and evolving consumer expectations. Since its adoption in 2007, the EU Pledge has significantly enhanced its commitment by increasing the types of media covered and by increasing its membership. These changes are the result of a constant review of the commitments and an on-going dialogue with key stakeholder and decision-makers, first and foremost in the context of the Platform on Diet, Physical Activity and Health.

EU Pledge member companies embarked in 2012 on an ambitious project to respond to concerns regarding the nutrition criteria applied by those companies that chose to continue advertising certain of their products to children under 12. Until now, members used company-specific nutrition criteria which, although science-based, raised potential problems of transparency and consistency. The EU Pledge therefore committed to developing common criteria, applicable only to those companies that currently use nutrition criteria. The criteria will not be applicable to companies that do not advertise any of their products to children under 12.

The EU Pledge nutrition criteria are designed for the exclusive purpose of food and beverage advertising to children under twelve and specifically for the product categories covered. This reflects international guidelines underlining the necessity to develop nutrient criteria that are tailored for a specific purpose. The use of the EU Pledge nutrition criteria for other purposes, such as for instance nutrition and health claims or taxation, would not be appropriate or scientifically credible.

The common EU Pledge nutrition criteria were developed on the basis of available international guidance and underpinned by some key principles agreed at the outset, including: a firm scientific basis; comprehensiveness; ability to make a difference; appropriateness in an EU-wide context; suitability for validation; and a clear and communicable rationale.

Different approaches to developing and applying nutrition criteria have been adopted across the globe. One approach is not necessarily better than another, but each system has specific advantages and disadvantages and all have inherent limitations. On the basis of a comprehensive discussion informed by the available evidence and guidance and underpinned by the above principles, the EU Pledge opted for a category-based approach, based on thresholds for key nutrients.

A category-based approach was selected because it is better able than a universal, across-the-board approach to reflect the role that different types of foods and beverages play in the average diet. It is also better at discriminating between food products within categories and therefore appropriate to further the core aim of the EU Pledge, i.e. to limit the types of food and beverage products that are advertised to children, while incentivising competition based on innovation and reformulation.

A threshold-based system was preferred to a scoring system since a key driver of common criteria was to enhance the consistency of existing company-specific criteria, most of which were based on threshold systems. Another factor in favour of a threshold-based system was increased transparency, a threshold system being more transparent and easier to communicate than a scoring system, whereby nutrition scores are worked out on the basis of an algorithm.



The common nutrition criteria are not intended as a universally applicable system. They cover nine defined categories produced or marketed by EU Pledge member companies. The choice of categories was motivated by the need to balance the need for simplicity and consistent treatment of similar products on the one hand and, on the other, the need to avoid categories so broad that only lax nutrition criteria would accommodate all types of products represented in a category. In order to ensure both robustness and fairness, it was necessary to create sub-categories within most of the nine categories.

No nutrition criteria were developed for certain categories, such as chocolate, confectionery and soft drinks. This reflects existing commitments by several member companies active in these categories and it confirms that none of the EU Pledge member companies will advertise these products to children under 12, as defined in the EU Pledge commitments.

The common nutrition criteria are based on a set of “nutrients to limit” and “components to encourage” (nutrients and food groups). A system taking into account both is more in line with the core objective of the EU Pledge – to foster innovation, reformulation and competition for a shift towards advertising of products meeting nutrition criteria – than a system based solely on “nutrients to limit”.

The “nutrients to limit” - sodium, saturated fat and total sugars – were chosen on the basis of widely available evidence that they are of public health concern because population average intakes are in excess of those recommended or desirable for health. Importantly, and in contrast to a scoring system, in the EU Pledge nutrition criteria “components to encourage” do not counterbalance “nutrients to limit”: to be eligible for advertising to children under twelve, a product will need to contain the required quantity of “components to encourage”, *in addition to* being below the thresholds for “nutrients to limit” and under the calorie cap set for each category. A specific rationale is outlined for the choice of energy caps and nutrient values in each category.

The common nutrition criteria will apply as of the end of 2014. In line with the framework approach of the EU Pledge, whereby companies must meet a common benchmark but can go beyond if they wish, member companies may use different nutrition criteria than the common criteria, but on condition that they are demonstrably more stringent than the common ones.

The EU Pledge nutrition criteria should be seen against the backdrop of the great challenge of developing EU-wide criteria. It is clear that any nutrition criteria will have their advantages and drawbacks and all systems will have inherent limitations. However, EU Pledge member companies believe that these common criteria are an important step forward in terms of improved transparency and consistency. These criteria will also make a tangible difference in practice: for many of the companies that currently use nutrition criteria, the new criteria mean that significantly fewer products will be eligible for advertising to children under twelve than is currently the case.

The full EU Pledge Nutrition Criteria White Paper is available at www.eu-pledge.eu

Conclusions and next steps

After five years of independent third-party monitoring, the EU Pledge has been able to demonstrate a high level of member companies' compliance with their commitments, as well as a significant change in the balance of food advertising to children in the EU towards options that meet common nutrition criteria. The membership of the initiative has also grown from 11 to 20 member companies, to cover over 80% of food and beverage advertising spend in the EU.

The EU Pledge is a dynamic initiative. While it provides a common framework, member companies can make commitments that go beyond it, and several do. Since its launch, over half of the founding member companies have stepped up their corporate commitments, tightening the way they define advertising to children, broadening the scope of their actions and strengthening the nutrition criteria.

In the same spirit and following constructive dialogue with stakeholders, the EU Pledge enhanced its framework voluntary commitments in 2012, applicable to all existing and any new members of the initiative throughout the EU.

The 2013 monitoring programme has shown that member companies were able to achieve high compliance levels with the new commitments. However, the compliance monitoring programme for company-owned websites has shown that there is still room for improvement. While reported instances of non-compliance have already or are being addressed by member companies, the EU Pledge will prepare detailed guidance to ensure improved compliance rates in 2014. The second monitoring programme for company-owned websites has further enabled the EU Pledge to draw lessons on how to further refine the monitoring methodology for the future – the development of a robust methodology for measuring compliance with the company-owned commitments was a challenge in itself.

The development of common nutrition criteria for those companies that apply nutrition criteria was an even more complex undertaking. Having adopted the new criteria, affected member companies have been working on their implementation swiftly, as significant adjustments to marketing, reformulation and R&D plans will be needed.

The EU Pledge is confident that the new nutrition criteria will significantly enhance the transparency and accountability of the initiative, as well as making a difference in practice by further shifting the balance of food and beverage advertising to children towards options that meet common nutrition criteria. EU Pledge member companies look forward to discussions with all stakeholders on these further improvements to the initiative.

Annex I – Accenture Compliance Report

EU Pledge Advertising to Children Commitment

Compliance and Change
Measurement Report 2013

High performance. Delivered.

The Accenture logo features the word "accenture" in a bold, lowercase, sans-serif font. A small orange chevron symbol is positioned above the letter "t".

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TV Methodology

The purpose of this report is to assess EU Pledge member companies' compliance with the following commitment:

“No advertising of products to children under 12 years, except for products which fulfil specific nutrition criteria based on accepted scientific evidence and/or applicable national and international dietary guidelines. For the purpose of this initiative, “advertising to children under 12 years” means advertising to media audiences with a minimum of 35% of children under 12 years.”

6 sample EU markets were chosen for monitoring: **Germany, Hungary, Spain, Poland, France* and Portugal****. All spots aired in these markets in Q1 2013 and Q1 2005 (benchmark) were reviewed for audience composition at the time of broadcast. Spots for products not meeting nutrition criteria and reporting an audience >35% children under 12 were deemed non-compliant.

EU Pledge member companies covered: Burger King, The Coca-Cola Company, Danone, Estrella Maarud, Ferrero, General Mills, Intersnack, Kellogg's, Lorenz Snack-World, Mars, McDonald's, Mondelez, Nestlé, PepsiCo, Royal FrieslandCampina, The Chips Group, Unichips – San Carlo, Unilever, Zweifel Pomy-Chips.

* For France children are defined as individuals aged 4-10.

** For Portugal children are defined as individuals aged 4-14.

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TV Methodology

- All spots by all EU Pledge member companies, aired in the 6 markets from 1 January to 31 March 2013 were analysed. This was a total of **845,904 spots**.
- Spots for products that do not meet EU Pledge companies' nutrition criteria, where applicable (some member companies do not advertise any products to children under 12), were identified on the basis of product lists supplied by the companies.
- Audience composition at the time each spot was aired was analysed, on the basis of national ratings data, to identify ads aired in and between programmes with an audience composed of 35% or more children under 12*.
- These spots were deemed non-compliant with the EU Pledge, i.e. all those ads for products that EU Pledge member companies have committed not to advertise to children <12* (“products that do not meet companies' nutritional criteria”), aired at times when the audience was composed of 35% or more children under 12*.

* For France children are defined as individuals aged 4-10.

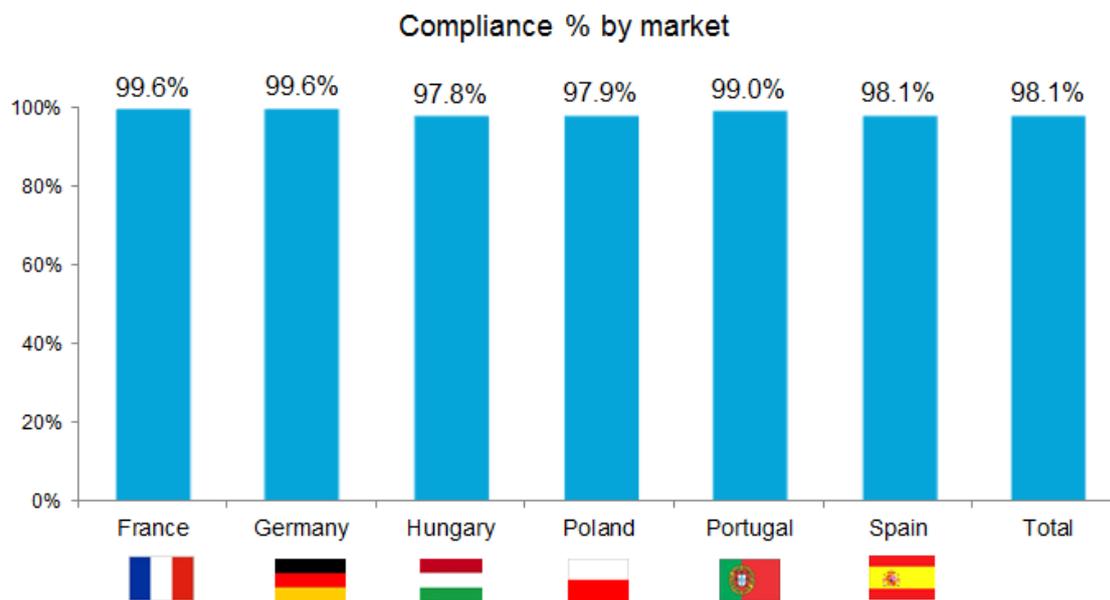
** For Portugal children are defined as individuals aged 4-14.

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4



Overall Compliance Results – All Spots



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Non compliant spots are Spots for restricted products with children profile >35%

5

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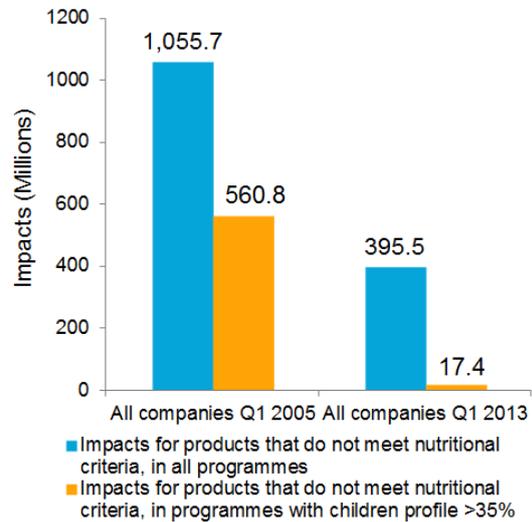


Germany: TV Trends Q1 2013 vs. Q1 2005

All spots advertising products that do not meet companies' nutritional criteria:
Children under 12 Impacts

The exposure of children under 12 to advertising for products that do not meet companies' nutrition criteria in Germany:

- Fell by 97% in spots with a reported profile of 35% or more children under 12
- Fell by 63% across all programming



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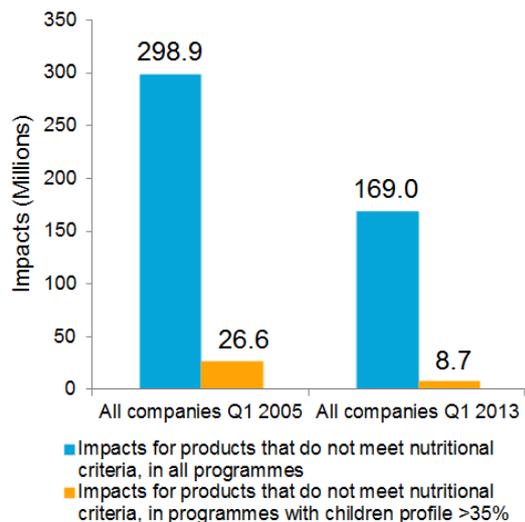


Hungary: TV Trends Q1 2013 vs. Q1 2005

All spots advertising products that do not meet companies' nutritional criteria:
Children under 12 Impacts

The exposure of children under 12 to advertising for products that do not meet companies' nutrition criteria in Hungary:

- Fell by 67% in spots with a reported profile of 35% or more children under 12
- Fell by 43% across all programming



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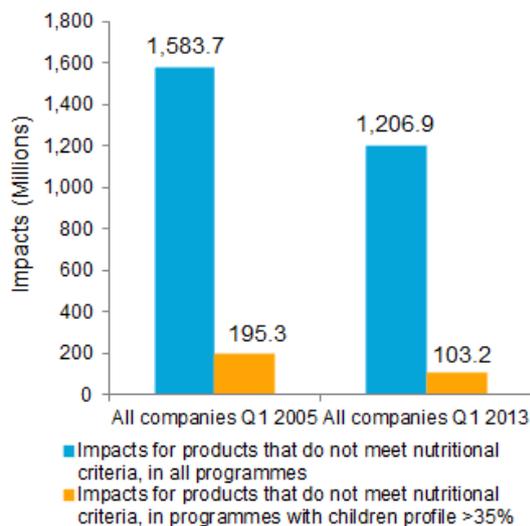


Poland: TV Trends Q1 2013 vs. Q1 2005

All spots advertising products that do not meet companies' nutritional criteria:
Children under 12 Impacts

The exposure of children under 12 to advertising for products that do not meet companies' nutrition criteria in Poland:

- Fell by 47% in spots with a reported profile of 35% or more children under 12
- Fell by 24% across all programming



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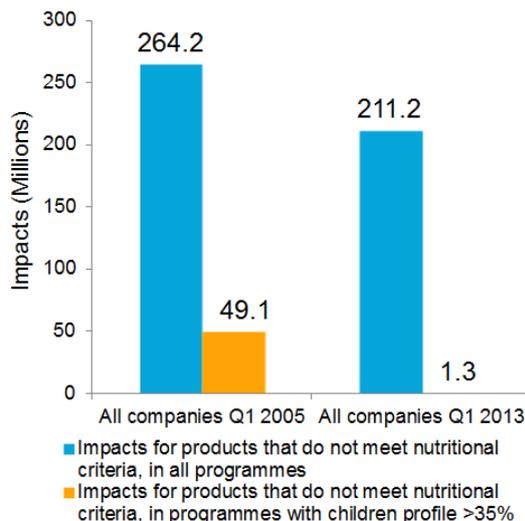


Portugal: TV Trends Q1 2013 vs. Q1 2005

All spots advertising products that do not meet companies' nutritional criteria:
Children under 12 Impacts

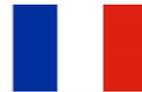
The exposure of children under 14 to advertising for products that do not meet companies' nutrition criteria in Portugal:

- Fell by 97% in spots with a reported profile of 35% or more children under 12
- Fell by 20% across all programming



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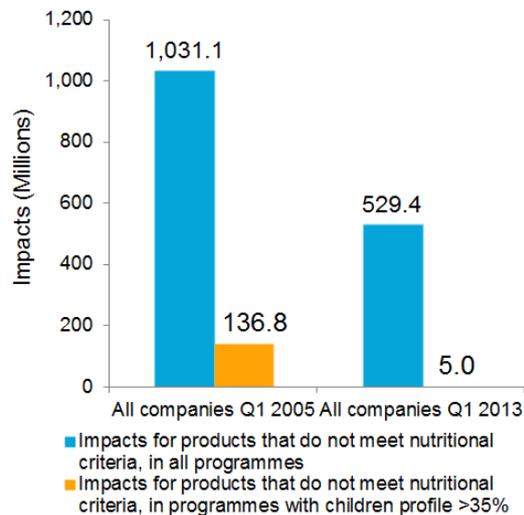


France: TV Trends Q1 2013 vs. Q1 2005

All spots advertising products that do not meet companies' nutritional criteria:
Children under 12 Impacts

The exposure of children under 10 to advertising for products that do not meet companies' nutrition criteria in France:

- Fell by 96% in spots with a reported profile of 35% or more children under 12
- Fell by 49% across all programming



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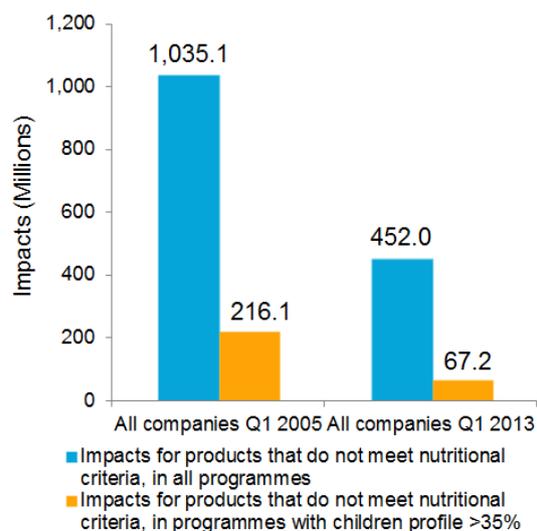


Spain: TV Trends Q1 2013 vs. Q1 2005

All spots advertising products that do not meet companies' nutritional criteria:
Children under 12 Impacts

The exposure of children under 12 to advertising for products that do not meet companies' nutrition criteria in Spain:

- Fell by 69% in spots with a reported profile of 35% or more children under 12
- Fell by 56% across all programming



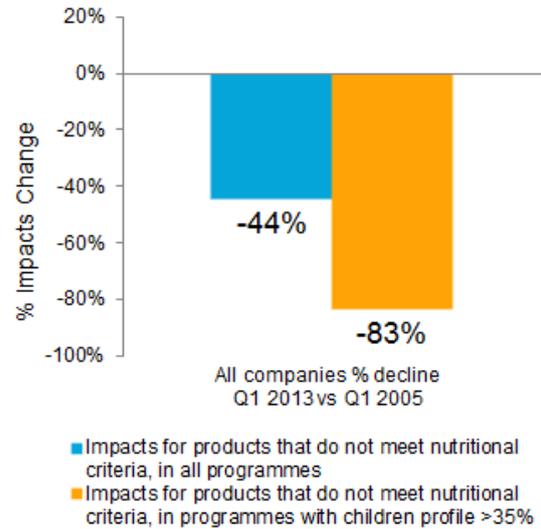
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All Markets & All Advertisers

All products that do not meet companies' nutritional criteria – impacts: Children under 12

Children's exposure to EU Pledge member companies' TV advertising for products that do not meet companies' nutritional criteria has dropped since 2005 by:

- 83% in programmes with a reported profile of 35% or more children under 12
- 44% across all programming



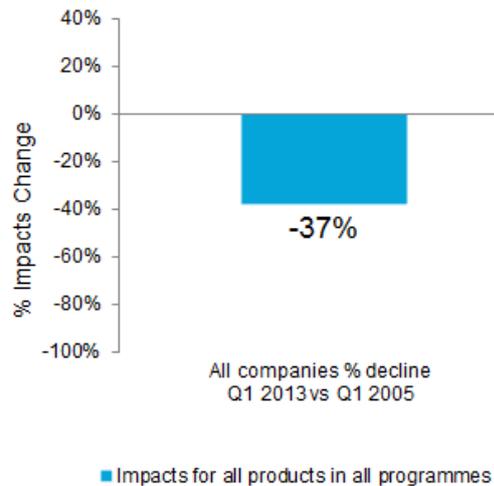
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All Markets & All Advertisers

All products regardless of nutritional criteria – impacts: Children under 12

Children's exposure to EU Pledge member companies' TV advertising for *all* products has dropped since 2005 by:

- 37% across all programming



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TV Definitions

Spot

Each individual advertising activity - the airtime used by the advertiser

Restricted products

Products that do not meet the advertiser's nutritional criteria for marketing to children

Profile

Demographic breakdown of the audience at spot level, with regard to children under 12 (under 14 in Portugal)

Impacts (Impressions)

Number of times a message is seen by the audience

GRP (Gross Rating Point)

Percentage of the target audience reached by an advertisement, multiplied by the frequency that the audience sees it. For example, a TV advertisement that is aired 5 times reaching 50% of the target audience, would have 250 GRPs (GRP = 5 x 50%)

TV Channels Monitored

Germany	Portugal	Hungary	
COMEDY C	AXN	AXN	NICKELODEON
DMAX	Disney Channel	CARTOON NETWORK	NOTA TV
KABEL 1	Fox	CBS REALITY	OzoneNetwork
KABEL EINS	Fox Life	COMEDY CENTRAL	PRIZMA TV
N 24	Hollywood	COOL	PRO4
Nick	MTV Portugal	DISCOVERY CHANNEL	RTL II
Nitro	Panda	DISNEY CHANNEL	RTL KLUB
N-TV	Panda Biggs	F+	SOROZAT+
PRO7	RTP1	FEM3	SPEKTRUM
PROSIEBEN	RTP2	FILM CAFE	SPEKTRUM HOME
RTL	SIC	FILM MANIA	SPORT 1
RTL II	SIC Mulher	FILM+2	SPORT2
RTL TELEVISION	SIC Noticias	LifeNetwork	STORY4
SAT.1	SIC Radical	MGM	STORY5
SIXX	TVI	MINIMAX	Super TV2
SPORT 1	TVI24	MTV (MUSIC TELEVISION)	TV PAPIKA
SUP RTL		MUSIC CHANNEL	TV2
SUPER RTL		MUSICMIX	UNIVERSAL CHANNEL
Tele 5		MUZSIKA TV	VIASAT3
VIVA		NAT GEO WILD	VIASAT8
		NATIONAL GEOGRAPHIC CHANNEL	VIVA

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TV Channels Monitored

Poland			
13th Street Universal [Hallmark]	Discovery World	Polsat Cafe	TV.DISCO
4fun.tv	Disney Channel	Polsat Crime & Investigation Network	TV4
Ale Kino+ [Ale Kino]	Disney Junior [Playhouse Disney]	Polsat Film	TV6
Animal Planet	Disney XD	Polsat Food	TVN
ATM Rozrywka	Domo+ [Domo]	Polsat JimJam [JimJam]	TVN Meteo
AXN	Eska TV	Polsat News	TVN Style
AXN Crime	Extreme Sports	Polsat Play	TVN Turbo
AXN Sci-Fi	FilmBox	Polsat Sport	TVN24
AXN Spin	FOX	Polsat Sport Extra	TVN7 [RTL7]
BBC CBeebies	FOXLife	Polsat Sport News	TVP HD
BBC Entertainment	HISTORY	Polsat Viasat Explorer [Viasat Explorer]	TVP Historia
BBC Knowledge	Investigation Discovery	Polsat Viasat History [Viasat History]	TVP INFO [TVP3]
BBC Lifestyle	ITV	Polsat Viasat Nature [Viasat Nature]	TVP Kultura
Boomerang	Kino Polska	Polsat2	TVP Polonia
Canal+	Kino Polska Muzyka	Puls 2	TVP Seriale
Canal+ Family 2 [Canal+ Gol]	kuchnia+ [kuchnia.tv]	Rebel.tv	TVP Sport
Canal+ Sport [Canal+ Niebieski]	MiniMini+ [MiniMini]	Religia.tv	TVP1
Cartoon Network	MTV Polska	Scifi Universal	TVP2
CBS Action [Zone Romantica]	Nat Geo Wild	Sportklub	TVR
CBS Drama [Club TV]	National Geographic	Superstacja	TVS
CBS Europa [Zone Europa]	Nickelodeon	TCM	Universal Channel
CBS Reality [Zone Reality]	nSport	Tele5	VH 1 [VH1 Europe]
Comedy Central	Orange Sport [Orange Sport Info]	teleTOON+ [ZigZap/Hyper]	Viacom Blink
Comedy Central Family [VH1 Polska]	Planete+ [Planete]	TLC	VIVA Polska
Discovery	Polo TV	Travel Channel	Wedding TV
Discovery Historia	Polsat	TTV - Twoja Telewizja	
Discovery Science [Discovery Sci-Trek]	Polsat Biznes [TV Biznes]	TV PULS [PULS]	

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TV Channels Monitored

Spain			France
45352	CMT	MTV	Canal +
13 TV	COSMOPOLITAN	NATIONAL GEOGRAPHIC	D8
40 TV	CRIMEN & INVESTIGACION	NATURA	France 2
8TV	CUATRO	NEOX	France 3
A3	CYLTV	NGC WILD	France 4
ANDALUCÍA TV	DECASA	NICK	France 5
ARAGON TV	DISCOVERY	NITRO	Gulli
AXN	DISCOVERY MAX	NOVA	M6
AXN WHITE	DISNEY CH +1	NUEVE	NRJ12
BIO	DISNEY CHANNEL	ODISEA	NT1
BOING	DIVINITY	PARAMOUNT CHANNEL	TF1
BUZZ ROJO	ENERGY	PARAMOUNT COMEDY	TMC
C.SUR	ESPORT3	SOL MÚSICA	W9
C9	ETB SAT	SOMOS	
CALLE 13	ETB2	SUPER3/33	
CANAL COCINA	FDF-T5	SYFY	
CANAL HOLLYWOOD	FOX	T5	
CANAL HOLLYWOOD +1	FOX CRIME	TELEDEPORTE	
CANAL+ 1	HISTORIA	TELEMADRID	
CANAL+ 1 ...30	IB3	TNT	
CANAL+ 2	INTERECONOMIA	TPA	
CANAL+ ACCION	LA SEXTA	TPA2	
CANAL+ COMEDIA	LA SEXTA 3	TV3	
CANAL+ DCINE	La1	TVG	
CANAL+ LIGA	LAOTRA	VIAJAR	
CANAL+ LIGA MULTI	LASIETE	XPLORA	
CANAL+ XTRA	MARCA TV	XTRM	

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Annex II – EASA Compliance Report



EASA

The European Advertising Standards Alliance (EASA) is the single authoritative voice of advertising self-regulation. EASA promotes high ethical standards in commercial communications by means of effective self-regulation for the benefit of consumers and business. For further information, please visit: www.easa-alliance.org.

As a non-profit organisation based in Brussels, EASA brings together national advertising self-regulatory organisations and associations representing the advertising industry in Europe.

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Compiled between October/November 2013

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Introduction

EASA was commissioned by the World Federation of Advertisers (WFA) and the EU Pledge Secretariat to review a number of food and beverage brand websites belonging to EU Pledge¹ member companies. The goal of the review was to determine whether the reviewed websites are compliant with the EU Pledge commitment on company-owned websites.

Compliance with the EU Pledge criteria is determined on the basis of whether:

- The website features marketing communications;
- Such marketing communications are promoting food or beverage products, as opposed to a brand in general;
- Such food and beverage products meet or do not meet the EU Pledge companies' nutritional criteria;
- Such marketing communications are designed to be targeted primarily at children under 12.

In order to offer unbiased, independent and accountable results, a 'consumer-oriented approach' was drawn up by the EASA secretariat in collaboration with the EU Pledge Secretariat and the independent reviewer of this exercise, Dr. Verónica Donoso². Advertising self-regulation experts were requested to try and think from the perspective of a child younger than twelve while reviewing brand websites and keep in mind what a child of this age would find interesting and attractive. Special attention had to be paid to specific aspects of the websites that would make them appealing to children younger than twelve.

¹ The EU Pledge is a voluntary commitment of leading food and non-alcoholic beverage companies to limit their advertising to children under 12 to products that meet specific nutritional standards (as defined by each company). The EU Pledge is a response from industry leaders to calls made by the EU institutions for the food industry to use commercial communications to support parents in making the right diet and lifestyle choices for their children. The EU Pledge programme is endorsed and supported by the World Federation of Advertisers.

² Verónica Donoso (PhD) is Post-doctoral researcher at the Interdisciplinary Centre for Law and ICT (ICRI), KU Leuven, iMinds. Her main areas of expertise are user experience research, children and young people's uses of new media and e-safety. Verónica has worked on a number of European and Belgian projects, including the EU Kids Online I, II and III. She also coordinated the 2nd Assessment of the Safer Social Networking Principles for the EU.

Project overview

Ten European self-regulatory organisations (SROs) were invited by EASA and the EU Pledge Secretariat to conduct the monitoring exercise in July and August 2013 in order to assess the appeal of marketer-owned websites to children under twelve. The ten chosen SROs represent different systems in terms of size (big vs. small SROs), location (geographical coverage) and maturity (new vs. old systems).

Table 1: List of participating countries/SROs

Country	SRO	Date of establishment
Belgium	JEP	1974
France	ARPP	1935
Germany	DW	1972
Hungary	ÖRT	1996
Poland	RR	2006
Portugal	ICAP	1991
Netherlands	SRC	1964
Romania	RAC	1999
Spain	AUTOCONTROL	1977
UK	CAP	1962

Self-regulation experts from SROs in France, Germany, Spain and the UK reviewed 40 national brand websites of the EU Pledge company members while the SRO in Poland reviewed 39 websites including at least two websites per company, where available. SROs in Belgium, Hungary, Portugal and the Netherlands reviewed 29 national brand websites while the SRO in Romania reviewed 28 websites including at least one website per company, where available. Corporate websites³ were excluded from the exercise.

Table 2: List of the EU Pledge member companies

EU Pledge signatories	
Coca Cola	Burger King
Ferrero	DANONE
Friesland Campina	Intersnack
Mondelez International	Lorenz Snack-World
Kellogg's	Estrella-Maarud ⁴
McDonald's	Chips Group ⁵
Mars	General Mills
Nestlé (and Cereal Partners)	Zweifel Pomy-Chip
PepsiCo	Unichips-San Carlo
Unilever	

³ A corporate website is a general informational website operated by a company.

⁴ No products available in the market.

⁵ No products available in the market.

Methodology

The EU Pledge Secretariat provided EASA with all products promoted by the EU Pledge member companies in each of the markets to be monitored, indicating whether they meet or do not meet the applicable nutritional criteria. Subsequently, EASA developed a list of websites which promoted products not meeting the applicable nutritional criteria, which was used by self-regulation experts to select the websites to review. When making their selection, the reviewers were requested to take into account products that are popular amongst children in their country.

The reviewers were requested to check if the marketer-owned websites complied with the EU Pledge criteria, using a dedicated questionnaire and methodology developed by EASA, the EU Pledge secretariat and the independent reviewer Dr. Verónica Donoso.

The reviewers noted if a website contained features to screen the age of the website visitor. This element was, however, not considered as sufficient to ensure compliance if the marketing communications on the website were clearly designed to appeal primarily to children under 12.

The reviewers were asked to check if the websites contained elements, such as games, animation, licensed characters and toys and to decide if these were in their view primarily designed for children under 12. Lastly, they had to judge if these elements, in conjunction with the creative execution of the website (i.e. simplicity of language, use of font size and typeface, use of colours etc.), were clearly intended to make the marketing communication(s) on the website primarily appealing to under-12s.

On the basis of the level of appeal of the creative execution to under-12s and the overall findings reported by the SROs, EASA determined the final compliance of the websites with the EU Pledge criteria.

Beyond the EU Pledge compliance, self-regulation experts also flagged any item on a website that potentially breached either one or several of the following advertising codes or laws:

- ICC Framework for Responsible Food and Beverage Marketing Communications;
- Relevant advertising standards and national sectoral codes;
- Relevant advertising laws.

All reviews were performed by self-regulation experts from national SROs; whereas EASA ensured that the results were reported in a consistent manner.

For reasons of impartiality and due process the independent reviewer Dr. Verónica Donoso, knowledgeable in both digital media and youth issues, was appointed to perform the following functions:

- Verify that appropriate criteria have been set up,
- Check that due process is observed throughout,
- Sign off on the EASA report compiled from the monitoring results prior to release, and testify to the correctness of the monitoring procedure and the scoreboard.

Note from the independent reviewer

The goal of the monitoring exercise was to determine whether the websites reviewed were compliant with the EU Pledge commitment regarding company-owned websites. As the independent reviewer I helped to design a methodology that made it possible to establish, in an objective and unbiased way, whether specific (commercial) websites were appealing primarily to children under the age of twelve.

Based on existing research on online advertising and web usability with children, a number of indicators were developed. These included the presence of children's sections, games, animations or toys, as well as specific elements of the graphic user interface (GUI) with a special focus on the (perceived) user-friendliness of the website and, in particular, of the sections targeting children.

In summary, the results of this year's assessment reveal that 22 of the 343 national brand websites reviewed (6% of the websites) were considered to be in breach of the EU Pledge as they contained elements that made them appealing to children younger than 12 and promoted products to children which did not meet the nutritional criteria of the companies' pledge. Among the elements employed to determine if a website was primarily designed for children were the presence of games (53 websites), toys (12 websites) and animations (30 websites) as well as the general creative execution of the website such as ease of language and navigation. SROs also checked for the presence of age screening as a mechanism to verify the age of the user visiting the website, or specific sections of it (27 websites). In total, 28 problematic items were flagged by the SROs; 20 out of the 343 websites reviewed contained items that were in breach of national advertising codes or relevant advertising laws.

With regards to the methodology employed, it is important to note that a certain degree of subjectivity is inevitable, especially given that different reviewers evaluate different websites. To act as a counterbalance and ensure reliability and consistency across the results, several quality control checks were performed by the independent reviewer and the EASA project team at different stages of the assessment. However, the results presented in this report are based solely on an expert assessment carried out by adults, which presents some obvious limitations. I would like to stress that some aspects of the assessment would have been more accurately evaluated if children (interacting with the websites) had been involved. Another drawback of the methodology lies in the fact that each website was reviewed by only one expert at each SRO; empirical research has demonstrated that expert evaluations can be maximised when carried out by more than one individual. However, close collaboration between the SROs and the EASA team throughout the whole testing and analysis process helped to overcome this shortcoming in practice. Nevertheless, it will be important to consider these criticisms in future editions of the EU Pledge monitoring exercise.

Having acted as independent reviewer of the EU Pledge compliance monitoring exercise for three years I have had the opportunity to witness the evolution of online marketing techniques and the growing number of strategies being employed to target younger audiences. It now seems insufficient to concentrate our efforts on the mere evaluation of

isolated product websites. Products are not just being advertised through websites but also through a variety of social media and (mobile) applications. It would therefore be timely to expand future assessments to include an evaluation of new and emerging connected platforms and devices and the interactions among them. Take for example the case of Apps, whose attractive, interactive and play-orientated nature makes them easily appealing to children.

Finally, I would like to highlight EASA's professionalism and dedication during the monitoring exercise. The consistent development of EASA's experience over the last few years has ensured that a rigorous evaluation process has been applied. This is an indispensable part of carrying out an objective, critical and transparent assessment of a self-regulatory initiative like the EU Pledge. I would also like to stress the importance of monitoring exercises like EASA's EU Pledge Survey; such exercises serve to foster the effective implementation of self-regulatory practices while encouraging responsible marketing communication practices which take into account children's vulnerabilities, needs and rights.

Important note

In collaboration with the EU Pledge secretariat and the independent reviewer Dr. Verónica Donoso, EASA has taken great care to ensure that the results of this project are objective and consistent. It has done so by developing a detailed methodology that was applied by all SROs involved. However, while it may be relatively easy to determine if a website appeals to children in general, it is much harder to determine if a website is designed to appeal primarily to children younger than twelve. Therefore, despite all the measures taken to ensure objectivity, SRO's decisions retain an unavoidable degree of subjectivity, which is however limited by SROs' extensive day-to-day professional experience. Readers are requested to bear this in mind.

Executive summary

- A total of 343 national brand websites were reviewed.
- All of the websites reviewed contained product promotion.
- Out of the 343 websites, 22 were considered in breach of the EU Pledge as they contained elements, such as games, toys or animations designed primarily for under-12s as well as language/text or navigation clearly intended to make the marketing communications on the website appealing primarily to under-12s.
 - 53 websites featured games that were considered to be designed to appeal primarily to under-12s
 - 30 websites contained animations that were considered to be designed to appeal primarily to under-12s
 - 23 websites exhibited licensed characters that were considered to be designed to target primarily children under-12
 - 12 websites were connected to a toy that was considered to be designed to appeal primarily to under-12s
- 20 out of the 343 websites reviewed contained items that were in breach of advertising codes or relevant advertising laws. In total 28 problematic items were flagged by the SROs.

1 Introductory remarks

1.1 General information

The table below provides an overview of the number of websites that were reviewed per country. A total of 343 websites were reviewed by self-regulation experts.

Table 3: Number of websites reviewed per country

Country	Number of websites reviewed
Belgium	29
France	40
Germany	40
Hungary	29
Netherlands	29
Portugal	29
Poland	39
Romania	28
Spain	40
UK	40
TOTAL	343

2 Findings

2.1 Product promotion

The reviewers identified product promotion on all websites reviewed.

2.2 Age screening / Parental consent

27 brand websites out of 343 reviewed contained a mechanism to screen the age of the website visitor. Methods ranged from a field where the visitor had to enter his/her date of birth to a pop-up asking whether the visitor was older than a certain age.

Figure 1: Number of websites featuring age screening (N=343)

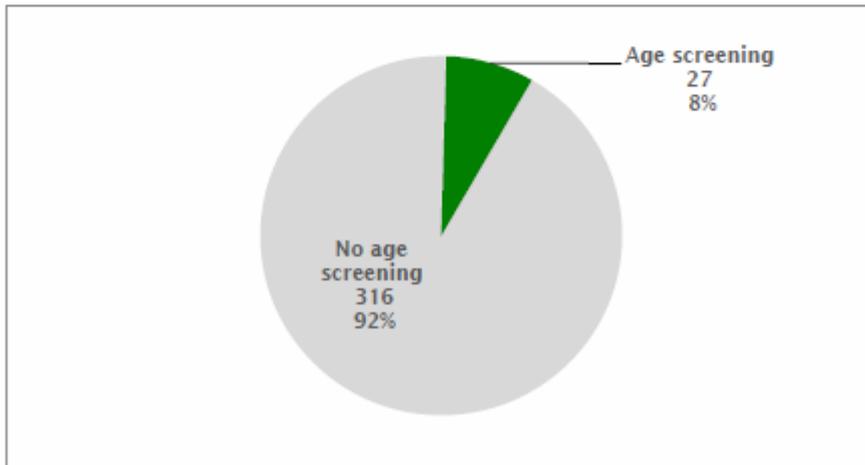
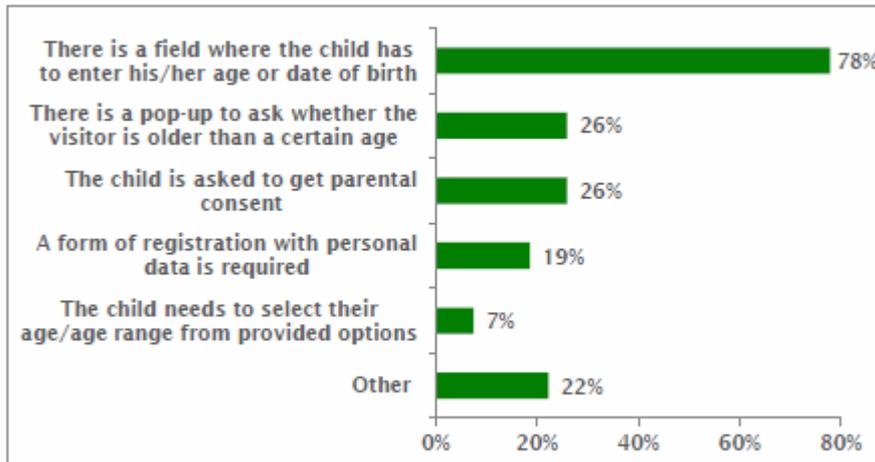


Figure 2: Types of age screening / parental consent (N=27)

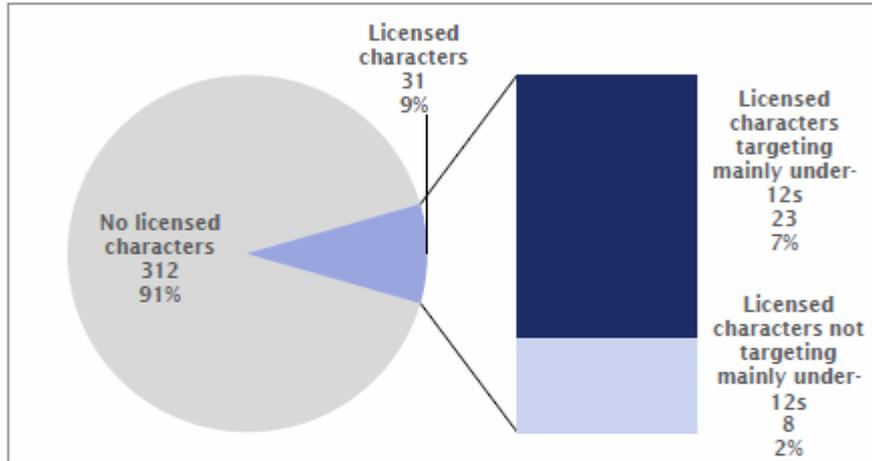


2.3 Licensed characters

The reviewers checked if the websites or the children's section(s) of the website featured "licensed characters", i.e. characters acquired externally and linked for example to movies, cartoons or sports, or if they featured movie tie-ins as a means to promote a food or beverage.

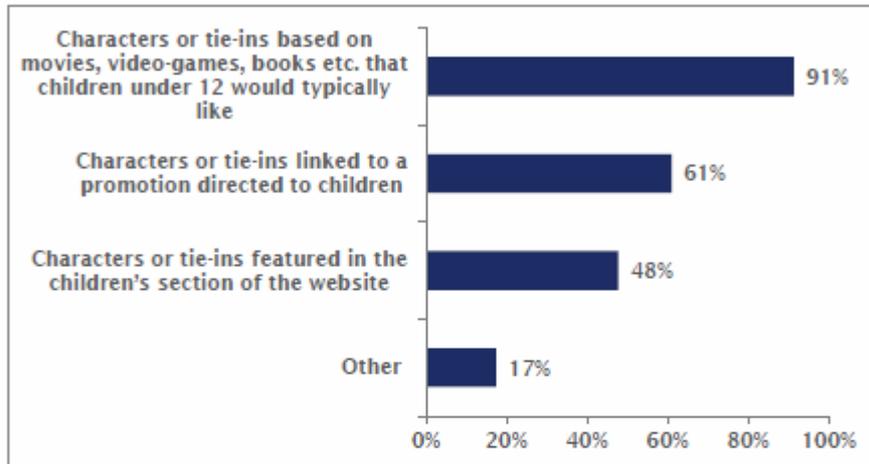
31 out of the 343 websites featured licensed characters and the reviewers considered that in 23 instances these characters or tie-ins were targeted primarily at children under-12.

Figure 3: Number of websites featuring licensed characters (N=343)



Reasons as to why the reviewers considered the licensed characters to be appealing primarily to under-12s are featured in the following chart. The combination of several of these criteria is a strong indicator that the licensed character is primarily appealing to young children.

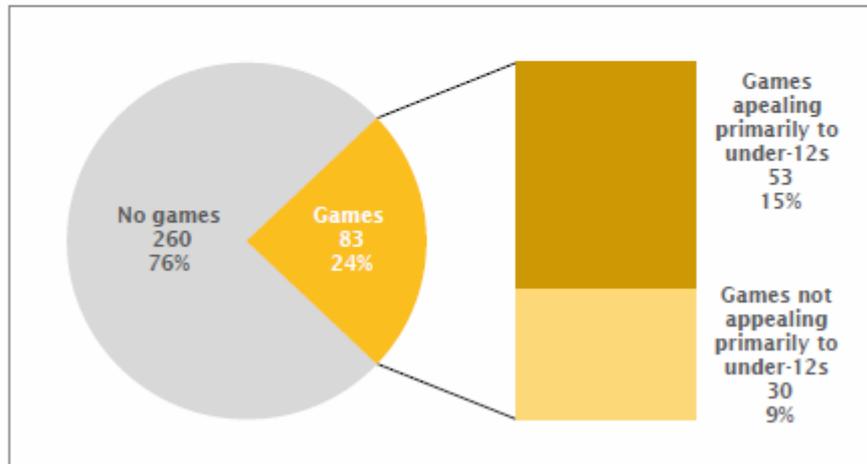
Figure 4: Main indicators for licensed characters considered primarily appealing to under-12s (N=23)



2.4 Games

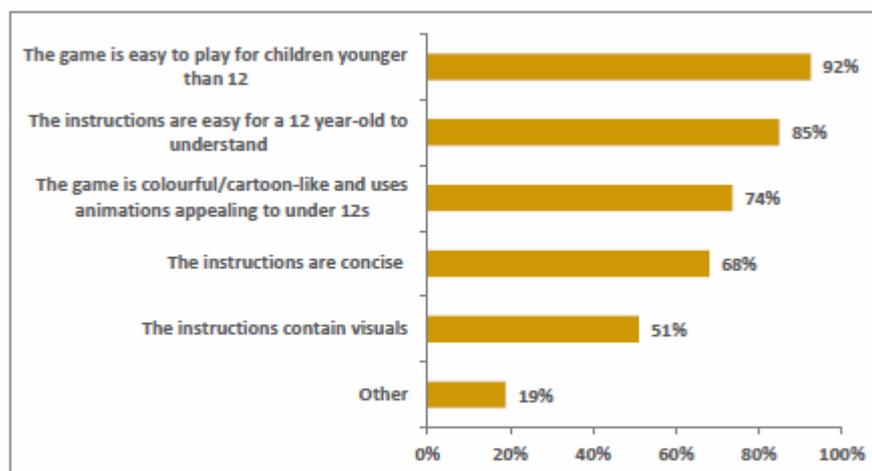
The reviewers identified games in 83 of the 343 websites reviewed and in 53 instances the reviewers considered that the games were designed to appeal primarily to under-12s. In addition, 41 of these websites used the games to promote food or beverages.

Figure 5: Number of websites featuring games (N=343)



Reasons as to why the reviewers considered the games to be appealing primarily to under-12s are featured in the following chart. The combination of several of these criteria is a strong indicator that the game is primarily appealing to young children.

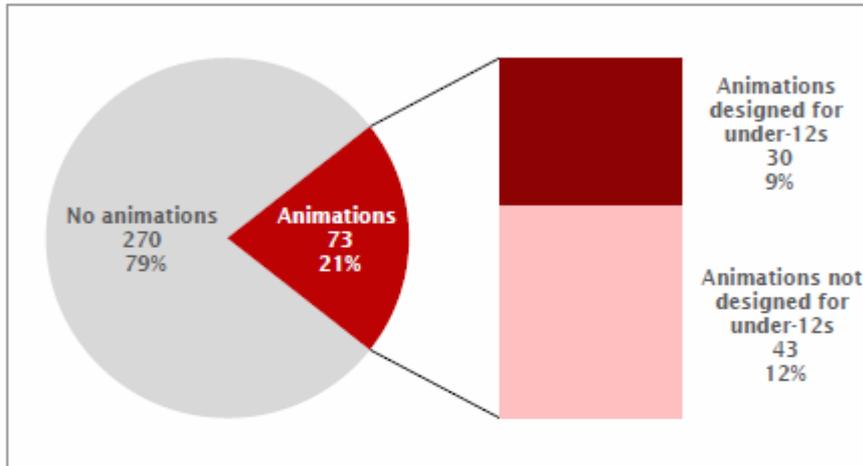
Figure 6: Main indicators for games considered primarily appealing to under-12s (N=53)



2.5 Animation and sound effects

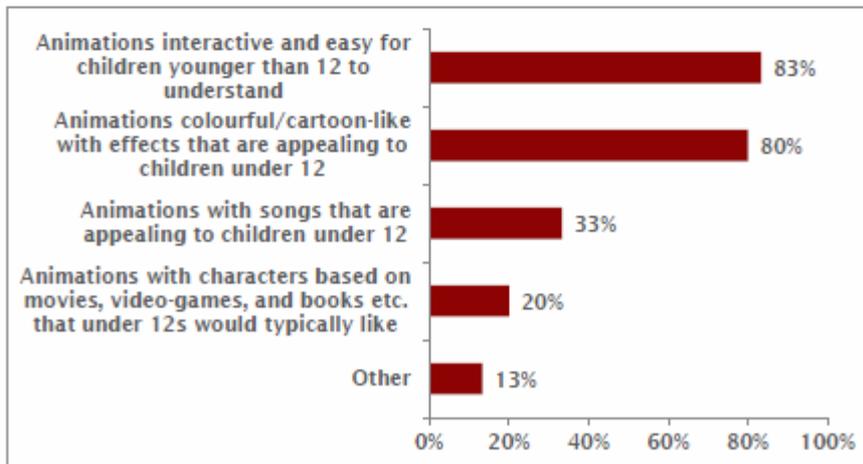
73 of the 343 websites reviewed featured animations, such as cartoons, animations depicting fantasy situations, sound effects or music. According to the reviewers, 30 of these websites used animations which primarily appealed to under-12s and 24 of these websites used the animations to promote food or beverages.

Figure 7: Number of websites featuring animation (N=343)



Reasons as to why the reviewers considered the animations/sound effects to be appealing primarily to under-12s are featured in the following chart. The combination of several of these criteria is a strong indicator that the animation/sound effect is primarily appealing to young children.

Figure 8: Main indicators for animations considered primarily appealing to under-12s (N=30)

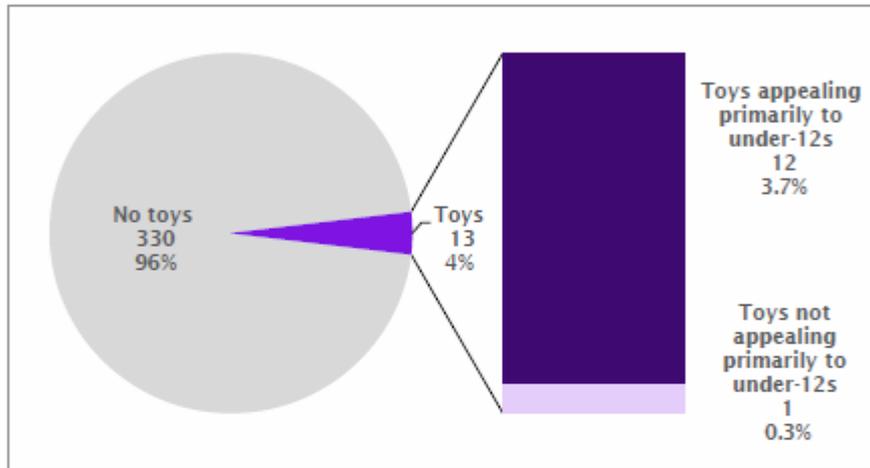


2.6 Toys/Premiums

The reviewers identified 13 websites that used toys or other premiums to promote a food or non-alcoholic beverage product. Examples of toys include figures of cartoon characters, board games, electronic devices like video game consoles and other premiums such as 3D glasses.

In 12 of the 13 cases the toys were considered to be designed to appeal primarily to children under the age of 12.

Figure 9: Number of websites featuring toys or premiums (N=343)



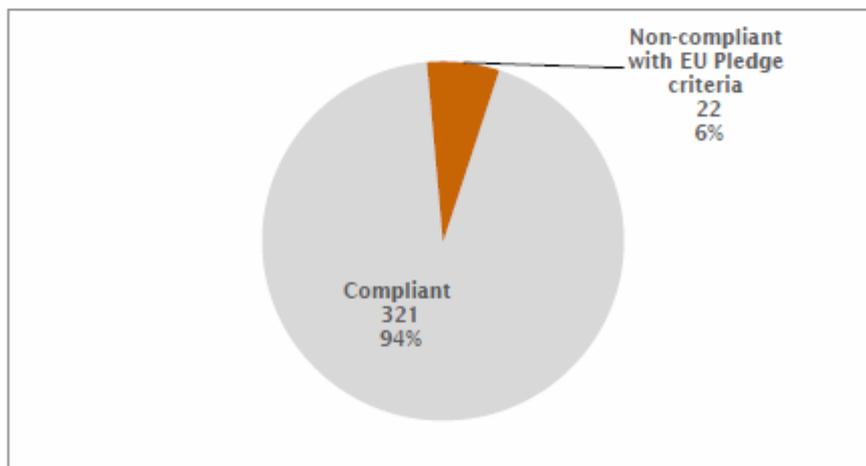
3 Compliance with the EU Pledge criteria

22 of the 343 websites reviewed were found not to be compliant with the EU Pledge.

All the previously identified elements, such as animations, games, toys or licensed characters had to be considered in conjunction with the creative execution of the website, that is the overall impression of the website design (use of colours, typeface, font size, language etc.) in order to determine whether the website was designed to target primarily under-12s and, therefore, to assess if the marketing communications were intended to appeal primarily to under-12s.

Decisive factors in judging the appeal of a website to young children were also the usability of the websites (i.e. ease of navigation), simplicity of language, font size, colour schemes as well as the level of entertainment offered on the websites.

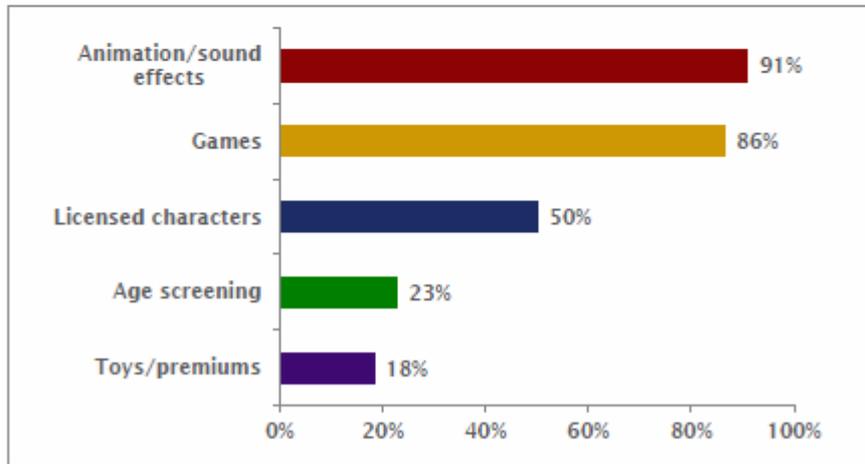
Figure 10: Number of websites in breach of the EU Pledge criteria (N=343)



20 websites that were considered as appealing primarily to children under 12 and therefore in breach of the EU Pledge featured animation while 19 websites contained games designed for under-12s. 11 websites featured licensed characters and four of them toys designed for children.

Furthermore, five websites contained an age screening mechanism.

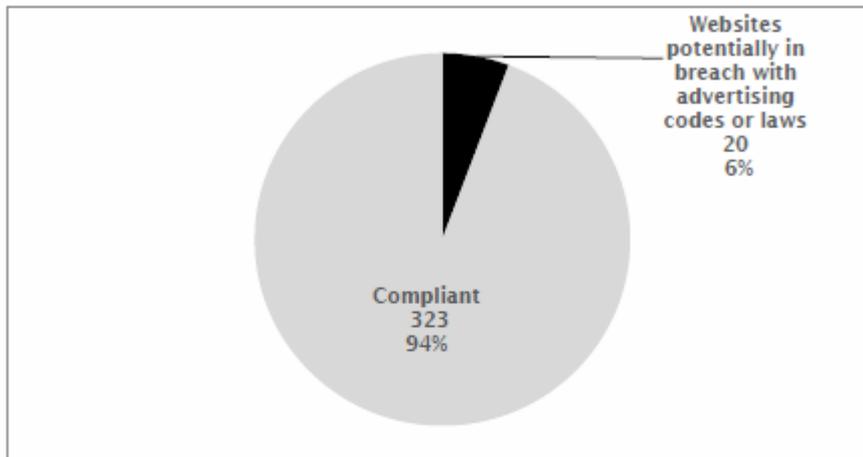
Figure 11: Main indicators of websites' appeal to under-12s (N=22)



4 Breaches of advertising codes/laws

On 20 out of the 343 websites, the reviewers identified items that were potentially in breach of advertising codes or relevant advertising laws.

Figure 12: Number of websites potentially breaching advertising codes or laws (N=343)



On these 20 websites a total of 28 problematic items were found.

Looking at the 28 items found to be likely in breach of advertising codes or laws, the main issue identified was the inappropriate age target for food advertising as seven websites were considered to be potentially in breach of the national Standards of Food Advertising Targeting Children, which specifies that food products should not be promoted directly to children younger than 12 unless the product meets nutritional criteria based on accepted scientific proofs and/or national or international nutritional recommendations.

In addition, five websites featured a sales promotion or a raffle without mentioning an expiration date. Three websites contained problematic health claims and another three elements of sales pressure.

Furthermore, the reviewers flagged three websites for lacking information regarding the size reference of the promoted toys and the product promotion connected to the licensed characters featured on the website.

Two websites featured expired sales promotions and another two featured images and videos that were considered to be potentially in breach of taste and decency rules.

On two websites the reviewers identified claims that were considered as condoning or encouraging poor nutritional habits or an unhealthy lifestyle to children.

Finally, one website was found to be potentially in breach of national codes because it featured stereotyped behaviours.

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Nutrition Criteria

Overview



Table 1: EU Pledge Nutrition Criteria Overview

Category 1: Vegetable and animal based oils, fats and fat containing spreads & emulsion-based sauces					
Sub-category A: Vegetable & animal based oils, fats & fat containing spreads: all animal and vegetable based fats & oils used as spreads on bread and/or food preparation. ⁹					
Examples	Energy (kcal/portion*)	Sodium (mg/100g or 100ml*)	Saturated fats (g/100g or 100ml*)	Total sugars (g/100g or 100ml*)	Components to encourage
<i>*Energy values are per portion and nutrient values per 100g, except when specified otherwise</i>					
Oils and fats (all types), full & low-fat margarine, butter mélanges, solid or liquid oil/fat products for roasting and frying	≤ 85	≤ 500	≤ 33% total fat is SAFA (incl. TFA)	(5)	≥ 25% of total fat is PUFA
Sub-category B: Emulsion-based sauces: sauces that constitute only a minor component of the meal to which an emulsifying agent is added OR have a fat content ≥ 10% w/w.					
Mayonnaise, salad dressings, marinades, vinaigrettes...	≤ 85	≤ 750	≤ 33% total fat is SAFA (incl. TFA)	≤ 5	≥ 25% of total fat is PUFA
Category 2: Fruits, vegetables and seeds,¹⁰ except oil Vegetables include legumes and potatoes. Seeds include seeds, kernels, nuts. Nuts include peanuts and tree nuts.					
Sub-category A: Products of fruits and vegetables except oils & potatoes (≥ 50g fruit and/or veg per 100g of finished product) that constitute a substantial component of the meal.					
Vegetable gratin, canned vegetables, baked beans, fruit compote, fruit in syrup, fruit salad	≤170	≤ 300	≤ 1.5	≤ 15	Min. ½ portion fruit and/or veg. Nutrients delivered through ingredients (fruit and/or veg).
Subcategory B: Potato & potato products, except dehydrated potato products: all potato based dishes (≥ 50g potato per 100g of finished products) that constitute a substantial component of the meal.					
Mashed potato, gnocchi, gratin, dumplings, fried or roasted potato...	≤170	≤ 300	≤ 1.5	≤ 5	Nutrients delivered through main ingredient (potato)
Subcategory C: Potato chips and & potato based snacks, incl. dough-based products					
Potato chips/crisps	≤170	≤670	≤10% kcal from SAFA	≤ 10	Fibre : ≥3g/100g/ml; and/or ≥70% UFA/total fat
Extruded & pelleted snacks, stackable chips	≤170	≤900 ¹¹	≤10% kcal from SAFA	≤10	Fibre : ≥3g/100g/ml; and/or ≥70% UFA/total fat

⁹ Butters as defined in Council regulation (EC) 1234/2007 Annex XV, are excluded from this category because they will not be advertised towards children.

¹⁰ Exemptions: 100% fruit and vegetables and their products, including 100% fruit and vegetable juices, as well as 100% nuts and seeds and mixes thereof (with no added salt, sugar or fat). These products, presented fresh, frozen, dried, or under any other form may be advertised to children without restrictions.

Sub-category D: Seeds and nuts					
Examples	Energy (kcal/portion*)	Sodium (mg/100g or 100ml*)	Saturated fats (g/100g or 100ml*)	Total sugars (g/100g or 100ml*)	Components to encourage
<i>*Energy values are per portion and nutrient values per 100g, except when specified otherwise</i>					
Salted or flavoured nuts, mixed nuts, nut-fruit mixes, peanut butter	≤200	≤670	≤10	≤ 15	Nutrients delivered through ingredients (nuts and seeds)
Sub-category E: Fruit/Vegetable based meal sauces: all fruit/vegetable based sauces (≥ 50g fruit and/or vegetable per 100g of finished products) that constitute a substantial component of the meal					
Tomato sauce, pasta sauce...	≤ 100	≤ 500	≤ 1.5	≤ 10	Nutrients delivered through ingredients (fruits and/or veg)
Sub-category F: Fruit/Vegetable based condiments: all fruit/vegetable based condiments (≥ 50g fruit and/or vegetable per 100g of finished products) that constitute only a minor component of the meal					
Tomato ketchup, chutney...	≤ 85	≤ 750	≤ 1.5	≤ 25	Nutrients delivered through ingredients (fruit and/or veg)
Category 3: Meat based products: processed meat/poultry, and meat products, consisting of minimally 50g of meat per 100g finished product					
Meatballs, salami, grilled ham, chicken fillet, sausages...	≤ 170	≤ 800	≤ 6	(≤ 5)	≥ 12% of energy as protein
Category 4: Fishery products: processed fish, crustaceans and shellfish, consisting of min. 50g of fish, crustaceans, and/or molluscs per 100g of finished product					
Cod parings, fried fillet of haddock, fish fingers, pickled mussels, tinned tuna	≤ 170 OR > 170 IF ≥ 25% total fat is PUFA	≤ 450	≤ 33% total fat is SAFA (including TFA)	(≤5)	≥ 12% of energy as protein
Category 5: Dairy products					
Sub-category A: Dairy Products other than cheeses: Must contain minimum 50% dairy (Codex Alimentarius standard)					
Milks & milk substitutes; yoghurts; sweet fresh/soft cheese; curd & quark; fermented milks; dairy desserts	≤170	≤ 300	≤ 2.6	≤ 13.5	Protein: ≥12 E% or ≥ 2g /100g or 100ml AND/OR At least 1 source of: Ca or Vit D or any Vit B
Sub-category B: Cheese and savoury dairy based products: Must contain minimum 50% dairy (Codex Alimentarius standard)					
Hard, semi-hard cheeses	≤ 85	≤ 900	≤ 15	(< 5)	At least one source of: Ca, Vit B12, Vit B2
Other cheeses, curd & quark and savoury dairy-based products	≤170	≤ 800	≤ 10	≤ 8	

¹¹ Individual ESA member companies may benefit from a longer period – up to the end of 2015 – in respect of this value, reflecting the uneven advancement of salt reduction programmes among EU member states. Should any member wish to benefit from such derogation, individual member companies shall specify this in their corporate EU Pledge commitments published on the EU Pledge website. During the additional transition period, the applicable sodium threshold shall not exceed 970mg/100g.

Category 6: Cereal based products					
Sub-category A: <u>Sweet</u> biscuits, fine bakery wares and other cereal based products: cereal must be listed as the main ingredient on the ingredient declaration.					
Examples	Energy (kcal/portion*)	Sodium (mg/100g or 100ml*)	Saturated fats (g/100g or 100ml*)	Total sugars (g/100g or 100ml*)	Components to encourage
<i>*Energy values are per portion and nutrient values per 100g, except when specified otherwise</i>					
All kinds of biscuits and cakes, cereal bars, flapjacks...	≤200	≤ 450	≤10	≤35	Fibre (≥3 g/100g) and/or whole grain (15% total ingredients) and/or 20%E from UFA and ≥70% UFA/total fat
Sub-category B: <u>Savoury</u> biscuits, fine bakery wares and other cereal based products, including dough-based products: cereal must be listed as the main ingredient on the ingredient declaration.					
Savoury crackers, extruded, pelleted & popcorn-based snacks, popcorn, pretzel products	≤170	≤900 ¹²	≤10% kcal from SAFA	≤10	Fibre : ≥3 g/100g; and/or ≥70% UFA/total fat
Sub-category C: Breakfast Cereals including porridge					
Ready to eat breakfast cereals such as cornflakes, puffed rice, porridge	≤210	≤450	≤5	≤30	Fibre (≥3g/100g) and/or wholegrain (15% whole grain per total ingredients)
Sub-category D: Cereal and cereal products except breakfast cereals, biscuits and fine bakery wares: cereal must be listed as the main ingredient.					
Bread, rusks, rice, noodles, pasta, polenta	≤340	≤500	≤5	≤5	Fibre (≥3 g/100 g) and/or wholegrain (15% of total ingredients)
Category 7: Soups, composite dishes, main course and filled sandwiches					
Sub-category A: <u>Soups</u> : all kinds of soups and broths containing min 1 of the following: 30g fruit, vegetables, cereals, meat, fish, milk or any combination of those (calculated as fresh equivalent) per portion. (Thresholds apply to food as reconstituted, ready for consumption, following manufacturer's instructions).					
Tinned tomato soup, instant vegetable soup, soup in stand-up pouches	≤ 170	≤ 350	≤ 1.5	≤ 7.5	Nutrients delivered through ingredients (fruits and/or veg, cereals, meat, fish, milk)
Sub-category B: <u>Composite dishes, main dishes, and filled sandwiches</u> : all kinds of dishes & sandwiches containing min 2 of the following: 30g fruit, veg, cereals, meat, fish, milk or any combination of those (calculated as fresh equivalent) per portion. (Thresholds apply to food as reconstituted, ready for consumption, following manufacturer's instructions).					
Pasta salad with veg, noodles with sauce, pizza, croque-monsieur, moussaka, filled pancakes	≤ 425	≤ 400mg	≤ 5	≤ 7.5	Nutrients delivered through ingredients (fruits and/or veg, cereals, meat, fish, milk)

¹² See footnote 3.

Category 8: Meals: The combination of items served as meal (main dish, side item (s) and a beverage) for breakfast, lunch or dinner.					
Examples	Energy (kcal/portion*)	Sodium (mg/100g or 100ml*)	Saturated fats (g/100g or 100ml*)	Total sugars (g/100g or 100ml*)	Components to encourage
<i>*Energy values are per portion and nutrient values per 100g/100ml, except when specified otherwise</i>					
Children's meals	≤510/meal ^{a)} ≤340/meal ^{b)}	≤660/meal	≤10% Kcal from saturated fats	≤20/meal (minus natural occurring sugar ^{c)} from 1 portion ^{d)} J/F/V/M/D)	Each meal must contain min. of: 1 portion ^{d)} fruit/ vegetables or/and 1 portion ^{d)} 100% juice or/and 1 portion qualified ^{d,e)} dairy product or milk or/and 1 portion ^{d)} of whole grain ^{f)}
Category 9: Edible ices: all kinds of edible ices (water ices and ice cream)					
Ice cream, water ice, ice lollies, sherbet ice	≤ 110	≤ 120	≤ 5	≤ 20	-
Exclusions (no nutrition criteria; are not advertised to children <12 by EU Pledge member companies)					
<ul style="list-style-type: none"> Sugar and sugar-based products, which include: Chocolate or chocolate products; Jam or marmalade; Sugar, honey or syrup; Non-chocolate confectionary or other sugar products¹³ Soft drinks¹⁴ 					

Notes:

^{a)} For lunch/dinner (30% energy)

^{b)} For breakfast (20% energy)

^{c)} If sugar content is higher than 20g for a meal and contains more than 1 J/F/V/M/D.

^{d)} Portions are:

- Fruits (F)/Vegetables (V): 60-80g
- 100% juice (J): 150-250ml
- Dairy (D): e.g. 30g cheese/100-150g yoghurt
- Milk (M): 150-250ml

^{e)} Meet individual category requirements

^{f)} Product qualified for a reasonable source of fiber which contains ≥ 8g whole grain

¹³ Sugar-free gum and sugar-free mints are exempted, i.e. outside the scope of EU Pledge restrictions.

¹⁴ The rationale for this exclusion is that currently some EU Pledge companies committed in 2006 not to market any soft drinks directly to children younger than 12 years old (see UNESDA commitments: <http://www.unesda.org/our-unesda-commitments-act-responsibly#year2006>). Discussions are ongoing regarding low-energy beverages. In the meantime companies that are not signatories to the UNESDA commitment will continue using their own nutrition criteria for these beverages, including fruit-based drinks. Bottled water is exempted from the EU Pledge restrictions.



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