

CATEGORY REPORT

RESPONSIBLE

MARKETING (15%)



Food and beverage marketing exerts a powerful influence on food environments worldwide, impacting dietary choices and, in turn, public health outcomes, especially among children.¹ The food and beverage industry spends billions annually marketing their products,² with expenditures expected to grow by 7.2% globally in 2024, substantially above the average growth in total marketing expenditures (4.6%).³

Numerous studies have found that the majority of food advertisements depict products high in fats, sugar and salt (HFSS). Evidence shows that children are extensively targeted by food marketing through a wide variety of channels and techniques, which disproportionately affect their food choices and dietary intake.

The World Health Organization (WHO) defines marketing as “any form of commercial communication or message that is designed to, or has the effect of, increasing the recognition, appeal, and/or consumption of particular products and services. It comprises anything that acts to advertise or otherwise promote a product or service.” WHO has established clear guidelines for governments to develop regulation to comprehensively restrict the marketing of unhealthy products to children, arguing that policies should “be sufficiently comprehensive to minimise the risk of ‘migration’ of marketing to other media, to other spaces within the same medium or to other age groups”. However, only 20 countries have mandatory restrictions on the marketing of HFSS products to children in place (as of 2022).

In the absence of government-led, WHO-aligned regulations in most markets (which ATNi hopes will eventually be adopted), this category assesses the extent to which companies have voluntarily adopted responsible marketing policies to comprehensively restrict their own marketing to children in alignment with WHO recommendations.

WHAT DOES GOOD PRACTICE LOOK LIKE?

The company has a public responsible marketing policy in place, covering all markets, which:

- **AGE THRESHOLDS AND PRODUCT RESTRICTIONS** - Restricts marketing to children - Defined as any person under 18 years of age - to only products that meet a definition of healthy, according to a WHO Regional Model or other government-endorsed nutrient profiling model (NPM), or commits to not market any products to children at all.
- **COMPREHENSIVENESS OF SCOPE** - Explicitly applies the policy to all media channels and techniques; for example, including those in and around schools, in the digital domain, in-store, and on-pack.
- **AUDITING COMPLIANCE** - Commissions independent third-party auditors to audit compliance with the company policy across a comprehensive range of media channels and techniques, in all markets.
- **GENERAL AUDIENCES** - Explicitly aligns with the International Chamber of Commerce (ICC) Framework for Responsible Food and Beverage Marketing Communications.

* Defined by the United Nations (UN) Convention on the Rights of the Child, and therefore WHO, as those under the age of 18.



MAIN FINDINGS

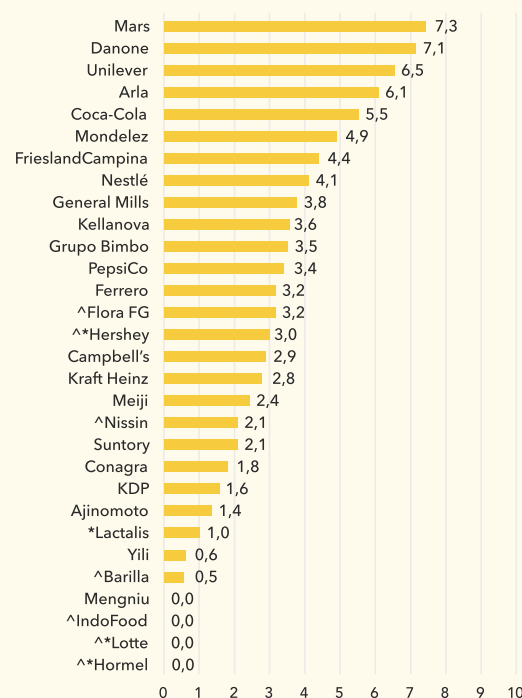
While 25 of the 30 companies were found to have policies that specifically address marketing to children, three of which have been introduced in the last three years, none have fully aligned theirs with WHO recommendations in terms of: 1) product healthiness restrictions; 2) age thresholds; and/or 3) comprehensiveness of application scope (i.e., marketing channels, techniques, and geographies). For example, only Arla has adopted the age threshold of 18 for defining a child, but does not apply this threshold to all marketing channels and techniques.

That said, five companies have improved their commitments on at least one of these aspects to more closely align with key WHO recommendations. However, to ensure that all children are protected from the harmful impact of unhealthy food marketing, in order to minimize the risk of migration, it is vital that all three conditions are met to ensure that all children are protected from the harmful impact of unhealthy food marketing.

As members of industry initiatives, the majority of companies have incrementally improved their commitments to responsibly market to children, especially in terms of age thresholds, application across media channels and techniques, and auditing. However, there remains a substantial misalignment between these commitments and WHO recommendations.

Geographic scope of responsible marketing policies: Of the 25 companies with responsible marketing to children policies, 15 apply theirs in all markets as a global minimum standard, while ten companies only apply theirs in specific markets. The responsible marketing to children policies of Campbell's, Conagra, Hershey, Keurig Dr Pepper (KDP), and Kraft Heinz, for example, are largely limited to their memberships of market-specific industry pledges, such as the Children's Food & Beverage Advertising Initiative (CFBAI), which only covers the US market. In addition, Meiji and Nissin specify that their policies only apply to Japan, and Lactalis' only to France. Suntory has introduced a new, stricter policy for its European market specifically, and Ajinomoto is unclear about the precise geographic scope of its specific commitments.

RESPONSIBLE MARKETING SCORES PER COMPANY (/10)



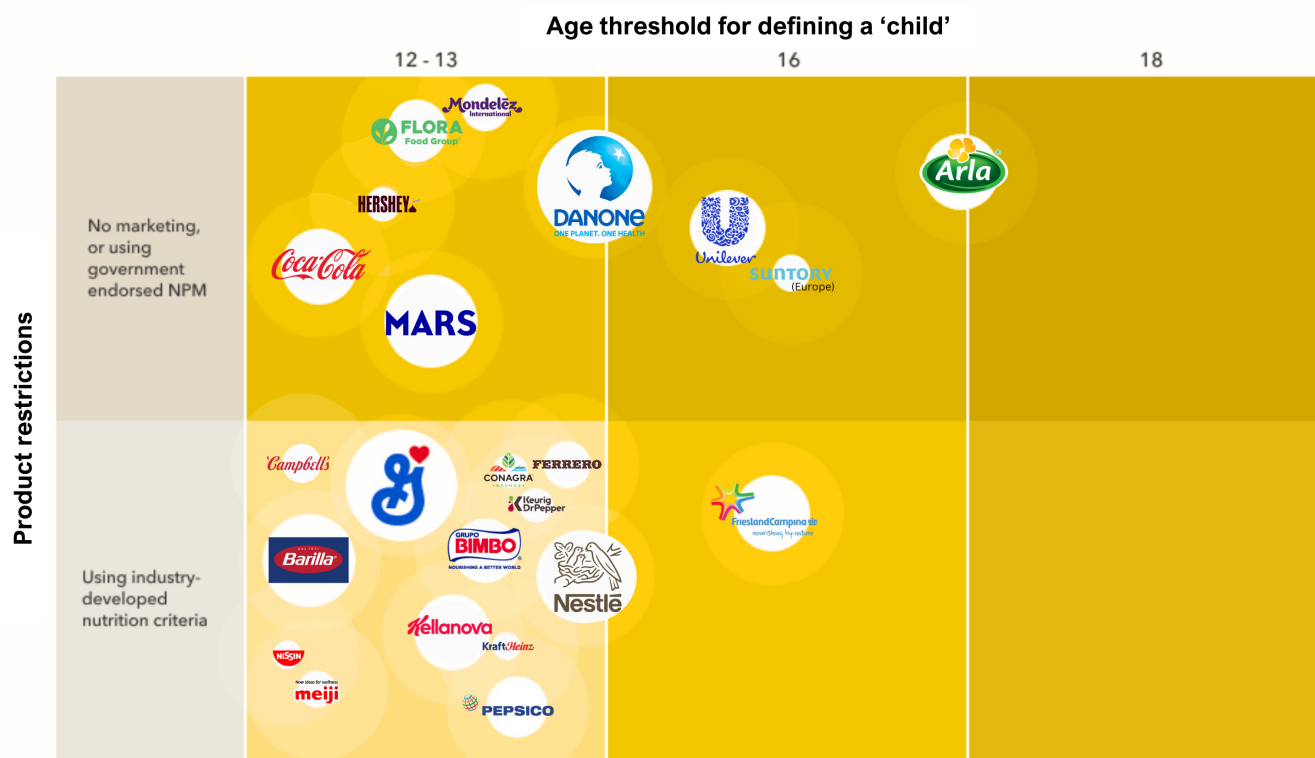
* Did not provide information to ATNI
^ Not assessed in 2021

Age thresholds for defining a 'child': As in the 2021 Global Index, one company (Arla) uses the WHO-recommended age threshold of 18 years, although its commitment also stipulates a range of more specific commitments for children under 13 years. As shown in Figure D.1., four companies (FrieslandCampina, Danone, Nestlé, and Unilever) have raised their age thresholds to 16 years; however, Danone and Nestlé specify that this only applies to measured media, such as television and radio, and use the age of 13 for other media channels and techniques.

Additionally, 17 companies use the age threshold of 13 years, with the three main industry initiatives (Table D.1.) all raising the threshold for defining a 'child' from 12 to 13 years since the 2021 Global Index. Ajinomoto, Barilla, and Lactalis continue to define a 'child' as anyone under 12 years of age.

FIGURE D.1.

OVERVIEW OF COMPANIES' POLICIES: AGE THRESHOLDS, PRODUCT RESTRICTIONS, AND COMPREHENSIVENESS



The size of each company's circle indicates the relative comprehensiveness of its policy in terms of the marketing channels and techniques it covers, according to indicator D.4. A fully comprehensive policy is indicated by the outer circle. Seven companies (Ajinomoto, Hormel, Indofood, Lactalis, Lotte, Mengniu, and Yili) are not shown, because they do not have a clear responsible marketing to children policy, or their policy does not include specific product restrictions or age thresholds for defining a 'child'.

Product restrictions for marketing to children:

As shown in *Figure D.1.*, Six companies commit to not market products to children (according to the company's definition of a child). Arla and Danone are the first of the companies assessed in ATNi's Indexes to commit to only market products that meet Health Star Rating (HSR) 3.5; a definition of 'healthier' using a government-endorsed NPM. However, none of the companies use one of the WHO Regional Models, which were developed specifically to determine products' suitability to be marketed to children.

Eleven companies restrict their marketing to children to products that either meet their own nutrition criteria (Kellanova, FrieslandCampina, Grupo Bimbo, and Nissin) or criteria developed by an industry pledge, such as that of the International Food and Beverage Alliance (IFBA), the CFBAI, or the EU Pledge.* An overview of memberships of these initiatives can be

found in *Table D.1.*

It should be noted that multiple studies have demonstrated that industry-developed models are considerably less strict than internationally recognised and/or government-endorsed models.

Scope of application to media channels and marketing techniques:

Fourteen companies state their marketing to children policies apply to 'all' marketing and/or advertising. However, it is important that they explicitly list what these policies include and exclude – especially in relation to the media channels and marketing techniques identified by WHO guidelines – given the vast array of different marketing techniques available and the ever-evolving advertising landscape (especially in the digital sphere).

Danone and General Mills were the most exhaustive in

* Campbell indicated to ATNi that none of its products are marketed to children at this time, but also specified that, if it were to market any products to children, it would use the CFBAI nutrition criteria.

this regard, followed by Mars and Nestlé. The majority of companies' responsible marketing policies are far from comprehensive in scope.

- **Digital marketing:** The majority of policies explicitly applied to paid ads on third-party websites (15) and company social media accounts (18), with other aspects of the ever-evolving digital marketing landscape least addressed – including streaming platforms (four companies), native advertising (four), and user-generated content (seven).
- **Marketing in schools:** Only 10 companies make a comprehensive commitment to not market in primary schools at all. Others address primary schools in their policies but make numerous exceptions, which undermines their commitments' robustness. Similarly, only eight companies commit to not market in secondary schools, and only five to not market in places near schools and other places where children gather.
- **Other key techniques and channels:** Other notable gaps in companies' policies related to WHO recommendations include the use of company-owned characters (six companies); packaging design (nine companies); toys, premiums, vouchers, and giveaways (nine); and in-store/point-of-sale marketing (10)

Limiting exposure on measured media: Seven companies (Arla, Danone, FrieslandCampina, KDP, Mars, Nestlé, and Unilever) state they use an audience threshold of 25% to determine whether a measured media channel (i.e., TV or radio) is 'child-directed' (using their own definition of a 'child'); with Arla and Danone lowering theirs since the 2021 Global Index. As members of the IFBA, CFBAI, and EU Pledge, 11 companies have lowered their audience thresholds from 35% to 30% since the last Global Index.

While there is increasing evidence that adopting time-based restrictions is a more effective strategy to limit children's exposure to food and beverage marketing across certain media channels, no company has adopted this practice in their responsible marketing policies.

TABLE D.1.
OVERVIEW OF COMPANY MEMBERSHIPS OF THREE MAIN INDUSTRY PLEDGES

Company	IFBA (Global)	EU Pledge (Europe)	CFBAI (US)
Arla *		•	
Campbell			•
Coca-Cola	•	•	•
Conagra			•
Danone *	/	•	•
Ferrero	•	•	•
Friesland Campina *		•	
General Mills	•		
Grupo Bimbo			
Hershey			•
Kellanova	•	•	•
KDP			•
Kraft Heinz			•
Mars *	/	•	•
Mondelez	•	•	•
Nestlé *	/	•	•
PepsiCo	•	•	•
Unilever *	/		•

• Currently a member

/ Left since 2021

* Has a global policy in place that goes beyond regional Pledges either in terms of age thresholds or product scope (see Figure 2)



**FOUR COMPANIES
HAVE RAISED THEIR
AGE THRESHOLDS
FOR DEFINING A
'CHILD' TO 16 YEARS**

Audits of responsible marketing policies: Of the 25 companies with responsible marketing to children policies, only two, FrieslandCampina and Mars, commission third-party audits to verify compliance with their commitments.

These audits cover at least five media channels across a wide range of markets (19 and 15 markets, respectively), and the results are published. While Grupo Bimbo, Nestlé, and Unilever also provided evidence that they commission third-party audits, these are currently less comprehensive and the results have not yet been published.

Ten additional companies indicated to ATNi that internal audits are conducted to measure compliance with their specific policies. However, limited details regarding the audits' comprehensiveness are known, and no company publishes the outcome of their audits. The lack of transparency around the details of companies' internal audits and risk of conflict of interest undermines their external legitimacy.

Members of key industry initiatives (an additional 14

companies, Table D.1.) have their compliance with the basic commitments of those respective pledges audited by an industry association-appointed third party. However, these audits assess a relatively limited range of media per market, only publish aggregated industry results, and do not assess the companies' commitments beyond the basic commitments of that initiative.

Additional responsible marketing commitments for all audiences: 19 of the 30 companies assessed in this Global Index explicitly commit to follow the ICC Framework for Responsible Food and Beverage Marketing Communications, the best available industry standard for responsible representation of food and beverage products for all audiences.

Of these, at least three companies (General Mills, Grupo Bimbo, and Kraft Heinz) committed to do so for the first time since the 2021 Global Index. Two additional companies (Barilla and Conagra) have commitments that align with some, but not all, aspects of the ICC Framework.

KEY RECOMMENDATIONS FOR THE SECTOR

While it is encouraging that the majority of companies have made improvements to their responsible marketing policies in the last three years, all companies can still substantially improve by aligning their policies more closely with WHO recommendations.

To facilitate this, companies are strongly encouraged to update their global responsible marketing policies to:

1 Evaluate

- Using the WHO Regional Nutrient Profiling Models, evaluate all products that are currently marketed to children to identify those that are not suitable to be.
- Review the latest WHO Guidelines on marketing to children policies to identify key recommendations that are not currently covered explicitly by the company's responsible marketing policy, including the marketing channels and techniques identified in the reports, as well as other measures to limit the exposure of children to the marketing of unhealthy products.

2 Transform

- Comprehensively integrate all key WHO recommendations into their responsible marketing policies, covering all markets, including:
 - Setting the age threshold for defining a 'child' to 18 years of age;
 - Committing to only market products suitable to be marketed to children according to a WHO Regional Nutrient Profiling Model (or another internationally recognized NPM), or market no products to children at all;
 - Applying this commitment to a comprehensive range of media channels and techniques.
- Audit compliance with their responsible marketing policies across a comprehensive range of media channels and techniques, in all markets, using independent third-party auditors.

ALL COMPANIES CAN STILL SUBSTANTIALLY IMPROVE BY ALIGNING THEIR POLICIES MORE CLOSELY WITH WHO RECOMMENDATIONS.

3 Disclose

- Publish the responsible marketing policy, explicitly referencing a comprehensive range of media channels and techniques covered.
- Publish the results of the audit of its own responsible marketing policy, including instances of non-compliance and how these were rectified.

NOTES AND REFERENCES

- ¹ World Health Organization (2023) "Commercial Determinants of Health," March 21, 2023, <https://www.who.int/news-room/fact-sheets/detail/commercial-determinants-of-health>; George Osei-Assibey et al., "The Influence of the Food Environment on Overweight and Obesity in Young Children: A Systematic Review," *BMJ Open*, no. 2 (2012), <https://doi.org/10.1136>.
- ² UConn Rudd, "Food Marketing," UConn Rudd Center for Food Policy and Health: Research, Food Marketing, 2017, <https://uconnruddcenter.org/research/food-marketing/#a1>; Statista, "Food Advertising in the United States – Statistics & Facts," Statista, 2023, <https://www.statista.com/topics/2223/food-advertising/#topicOverview>; Monique Potvin Kent et al., "Food and Beverage Advertising Expenditures in Canada in 2016 and 2019 across Media," *BMC Public Health* 22, no. 1 (August 1, 2022): 1458, <https://doi.org/10.1186/s12889-022-13823-4>.
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- ⁴ Brijesh Sivathanu, "Food Marketing and Its Impact on Adolescents' Food Choices," *Indian Journal of Marketing* 47, no. 8 (2017): 46–60; "Food Marketing Exposure and Power and Their Associations with Food-Related Attitudes, Beliefs and Behaviours: A Narrative Review" (Geneva: World Health Organization, 2022), <https://iris.who.int/bitstream/handle/10665/351521/9789240041783-eng.pdf?sequence=1>. doi: 10.17010/ijom%2F2017%2Fv47%2Fi8%2F117432.
- ⁵ WHO, "Policies to Protect Children from the Harmful Impact of Food Marketing: WHO Guideline" (Geneva: World Health Organization, 2023), <https://iris.who.int/bitstream/handle/10665/370113/9789240075412-eng.pdf?sequence=1>.
- ⁶ WHO, "Policies to Protect Children from the Harmful Impact of Food Marketing: WHO Guideline."
- ⁷ WHO, "Policies to Protect Children from the Harmful Impact of Food Marketing: WHO Guideline."
- ⁸ WHO, "Policies to Protect Children from the Harmful Impact of Food Marketing: WHO Guideline."
- ⁹ Emma Calvert, "Food Marketing to Children Needs Rules With Teeth: A Snapshot Report about How Self-Regulation Fails to Prevent Unhealthy Foods to Be Marketed to Children" (Brussels: BEUC, The European Consumer Organisation, 2021), https://www.beuc.eu/sites/default/files/publications/beuc-x-2021-084_food_marketing_to_children_needs_rules_with_teeth.pdf; Healthy Eating Research (HER), "Assessing the Public Health Impacts of the Children's Food and Beverage Advertising Initiative," Research Brief (Robert Wood Johnson Foundation, 2021), <https://healthyeatingresearch.org/wp-content/uploads/2021/10/HER-CFBAI-brief-101421.pdf>; Dale L. Kunkel, Jessica S. Castonguay, and Christine R. Filer, "Evaluating Industry Self-Regulation of Food Marketing to Children," *American Journal of Preventive Medicine* 49, no. 2 (August 2015): 181–87, <https://doi.org/10.1016/j.amepre.2015.01.027>.
- ¹⁰ WHO, "Policies to Protect Children from the Harmful Impact of Food Marketing: WHO Guideline"; WHO & UNICEF, "Taking Action to Protect Children from the Harmful Impact of Food Marketing: A Child Rights-Based Approach" (Geneva: World Health Organization (WHO) and the United Nations Children's Fund (UNICEF), 2023), <https://iris.who.int/bitstream/handle/10665/370355/9789240047518-eng.pdf?sequence=1>.
- ¹¹ WHO & UNICEF, "Taking Action to Protect Children from the Harmful Impact of Food Marketing: A Child Rights-Based Approach."