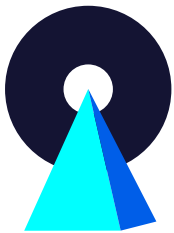


L'essentiel



Evaluation of the Food Charter - 2023 Edition

This report covers the third year of application of the current charter and includes an initial assessment of developments since it was signed. As the current charter expires in 2025, this report also sets out the priorities defined by Arcom as part of the renegotiation process.

The signatories' involvement has led to an overall improvement in the display and quality of the Nutri-Scores shown around programmes for younger viewers. The audiovisual media have also met their quantitative commitments to broadcast programmes promoting a healthy lifestyle.

The new qualitative survey carried out as part of the report confirms the incentivising potential of healthy lifestyle programmes, which are both messages of reassurance and tools for putting them into practice. When digital content goes against a healthy lifestyle, it appears particularly problematic insofar as using the rules of experience and de-dramatisation can generate a certain degree of support from the respondents.

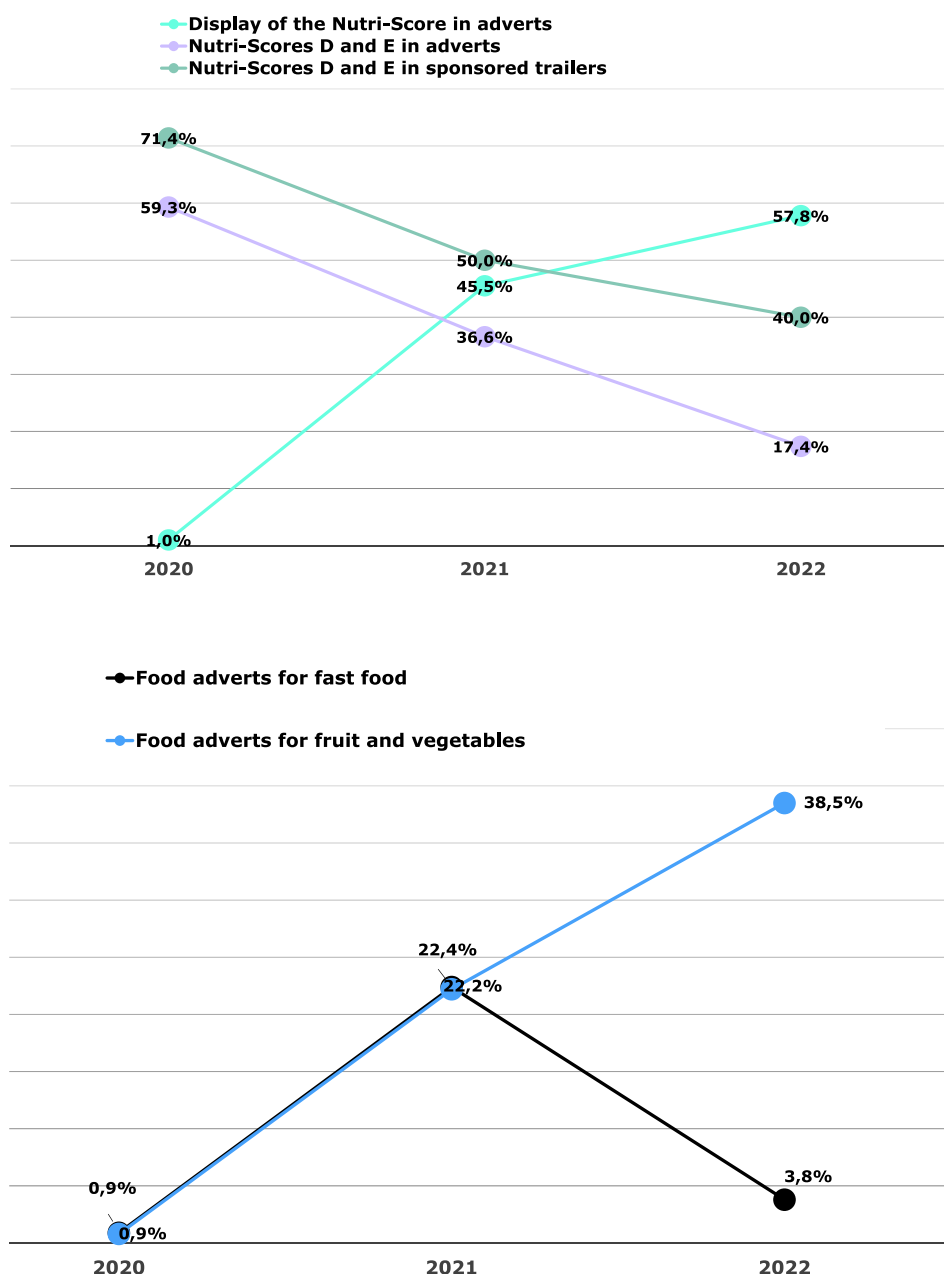
Particular attention must continue to be paid to food marketing communications around jointly viewed programmes. While there has been a clear increase in the display of Nutri-Scores, the prevalence of Nutri-Scores D and E continues to be observed.

The trend towards greater use of platforms by younger audiences and the reduction in their individual listening time led the Authority to make specific observations about YouTube last year. As part of the 2022 exercise, Arcom carried out investigations into the food content on TikTok, a platform that is particularly popular with young people.

Arcom's priority objectives as part of the renegotiation of the food charter are as follows:

- Ensuring that the future charter is consistent with the National Strategy for Food, Nutrition and Climate (SNANC), which is currently being drawn up;
- Involving digital stakeholders before future actions that may be carried out under the regulation on digital services;
- Inclusion in the future charter of a focal point on commercial communications promoting fast-food outlets around programmes for younger viewers and jointly viewed programmes.

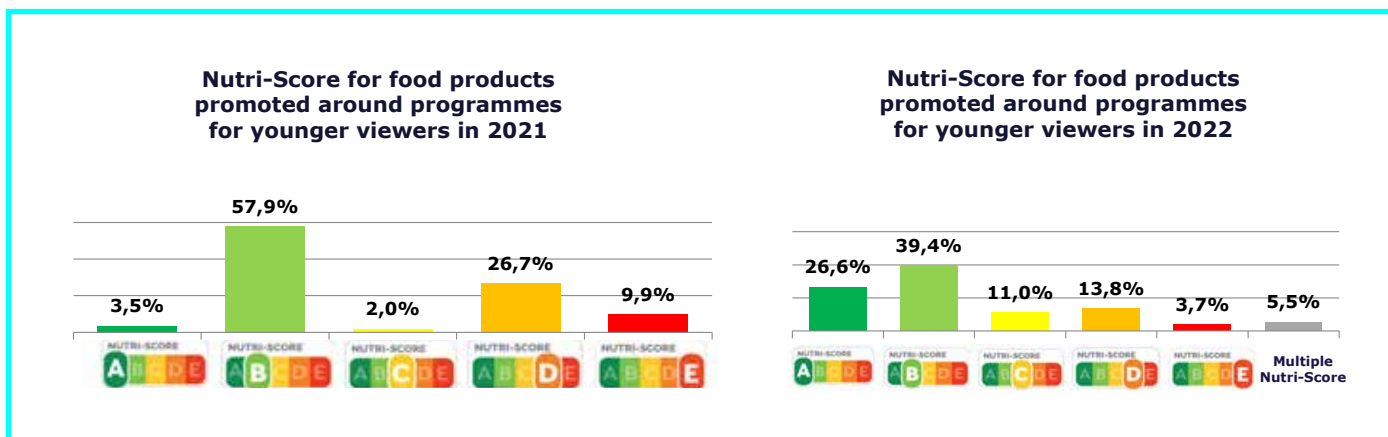
Food marketing communications around programmes for younger viewers¹: increase in the display rate and quality of the Nutri-Score



Most of the products shown are rated A and B (26.6% and 39.4% respectively). The increase in the proportion of products associated with a Nutri-Score A shows that editors are changing their practices in this area, since this represented only 3.5% in 2021.

The reduction in the proportion of products displaying a Nutri-Score E has also been observed (3.7% in 2022 compared with 9.9% in 2021). However, it should be pointed out that the proportion of E-rated products was only 1% in 2020.

¹ The advertising and sponsorship screens broadcast around and during programmes for younger viewers were viewed over four weeks, including 17 January, 9 May, 22 August and 24 October. The survey covered the TF1 and M6 segments for younger viewers and the 7am-9am slot on Gulli, Télétoon + and the Disney Channel.



The **Nutri-Score display rate** for products covered by this labelling has **continued to rise (57.8% in 2022 compared with 45.5% in 2021)**. As a reminder, this rate only reached 1% in 2020. The reinforcement of this on-screen signage is commendable in that it gives viewers access to easily understandable information about the nutritional quality of the food products displayed.

However, care should be taken when advertising several products at the same time: it has been observed that the Nutri-Score is only displayed for products with the highest scores.

Food sponsorship around programmes for younger viewers: results are improving

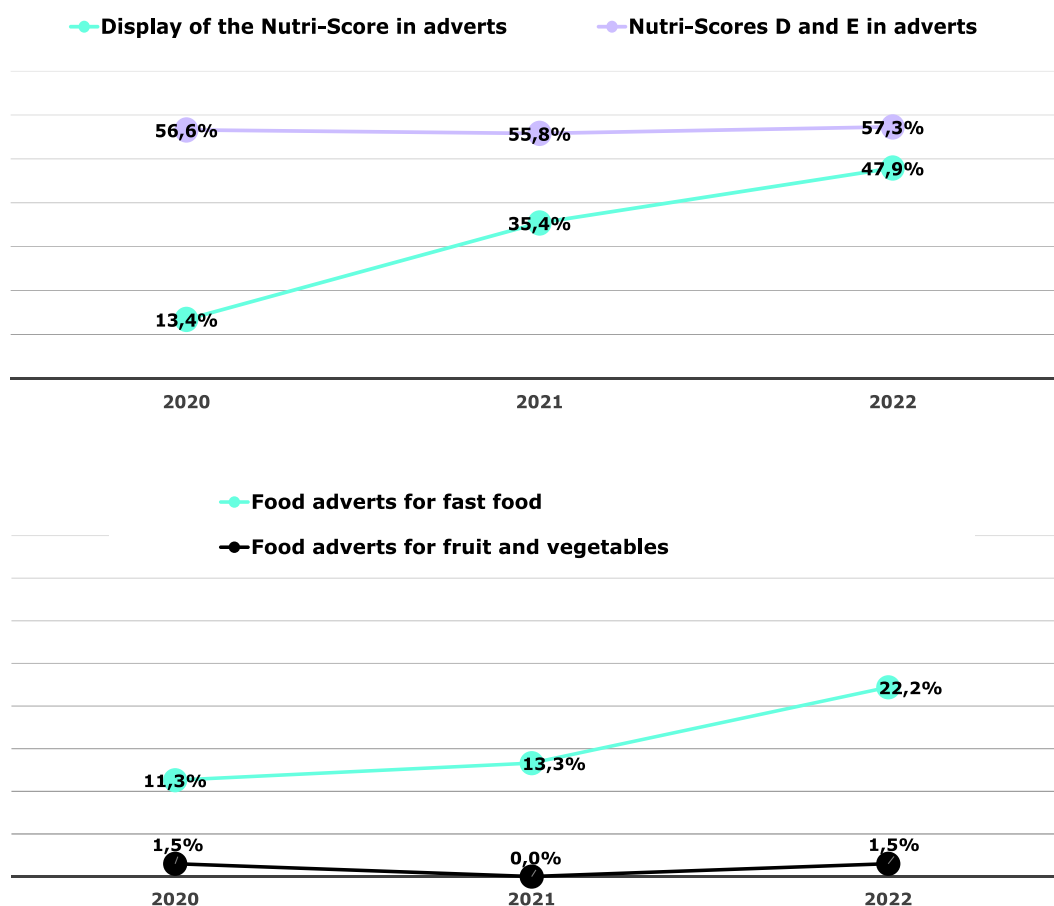
As far as sponsorship is concerned, **the few food products** highlighted in the segments aimed at younger viewers **have good nutritional qualities** (Nutri-Score A).

As in the previous year, it was noted that trailers were broadcast around segments aimed at younger viewers. Despite the presence of chocolate products (19%) among the three most represented food product groups, **an overall improvement in the Nutri-Score** associated with products promoted during trailers was noted. While **E-rated products** still accounted for 36.8% of sponsorship

in 2021, this proportion has reduced to **20%**. In contrast, B-rated products are shown more (30% compared with 21.1% in 2021).

27.5% of the sponsorship concerned refer to the Nutri-Score (compared with 13.2% in 2021), exclusively displaying an A or B score (10% and 30% respectively), while C, D and E scores are also shown (20% for each of the three scores).

Jointly viewed programmes²: the food advertising and sponsorship broadcast continue to require particular attention



Children's exposure to food advertising appears to be higher around programmes for jointly viewed programmes. In fact, food adverts account for more than a quarter of all adverts seen by Arcom in these segments.

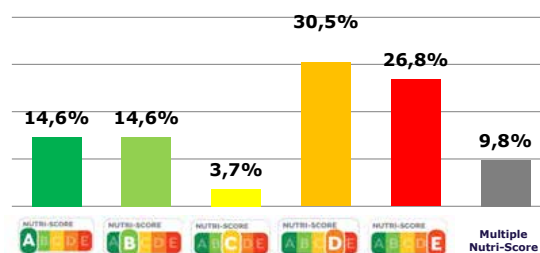
The proportion of commercial communications dedicated to **fast food** reached **22.2% (+8.9 points compared to 2021)**. In addition, **chocolate products** are still largely represented (**12.6% in 2022** compared with 11.4% in 2021).

The **fall in the proportion of adverts devoted to sugary drinks** is nevertheless worth highlighting: they represented **5.2% in 2022** whereas they were the most represented category in 2021 (13.3%).

As a result, the products presented around jointly viewed programmes have a **low Nutri-Score** and mostly correspond

to **D or E ratings: 57.3%** (+1.5 points compared with 2021).

Nutri-Score for food products broadcast before, during and after jointly viewed programmes



² A jointly viewed programme is one that simultaneously reaches several viewers or listeners of different age groups within a household. The ten programmes studied were those in the first part of the evening with a viewership of at least 20% among 4-14 year-olds and with more than 200,000 viewers aged 4-14.

When it comes to food sponsorship of jointly viewed programmes, the Nutri-Score is rarely displayed, either

on the programmes themselves or in the trailers.

Findings on the TikTok platform: a sometimes porous boundary between commercial and spontaneous content

As part of the 2022 financial year, Arcom chose to investigate food content on the TikTok platform, which is a medium for content posted online and viewed by many French people, and more specifically by young people. Last October, the platform claimed to have 21.4 million monthly users in France, and every day, 4-14 year-olds spend an average of 1 hour 47 minutes on TikTok.

With their prescriptive authority, the content creators on this platform attract large numbers of advertisers to promote their products or services:

- Due to the **broad representation of brand names** rather than specific products, the posts viewed can **rarely be associated with a Nutri-Score**.
- While some **commercial collaborations** encourage movement by presenting a variety of challenges, others promote a **'recreational' vision of food**,

particularly through transgressive food associations.

- **The presence of posts focusing on food consumption**, whose commercial nature is not indicated, does however seem to play a direct role in promoting products and brands.
- In contrast to the commercial collaborations indicated as such, it has been noted that this content often includes **statements, descriptions and attitudes** that require particular attention in view of the **excessive consumption** that they help to promote.

Actual exposure of audiences to commercial communications: children do not appear to be more exposed to food advertising than other age groups in the population.

Each child aged between 4 and 14 watched an average of **1,009 adverts for food products in 2022 (18 fewer than in 2021)**. These adverts represent **19.4%** of all adverts seen by these same children, which is a proportion close to that of other categories of the population.

The adverts most seen by children throughout 2022 were those for **toys and games for girls and boys**. It also includes those with the highest percentage of

children in their viewership. Nearly 44% of adverts for this product group are viewed by children³.

In 2022, **fast food** was the **third** most frequently viewed **product group** in adverts by children aged 4 to 14. This group is also up from fifth place in 2021.

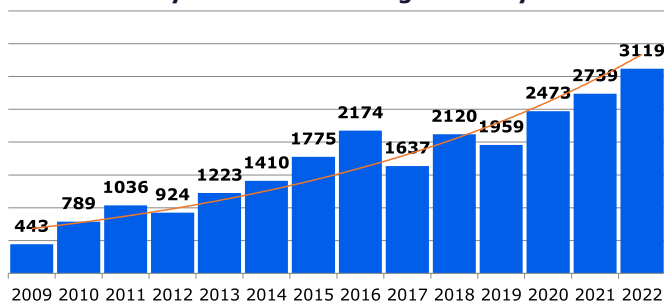
Initiatives to promote a healthy lifestyle: the audiovisual media meet their quantitative commitments and renew the proposed programmes

The general-interest TV channels (including the Outre-mer la 1ère network) and those aimed at younger viewers broadcast **3,119 hours of programmes** promoting a varied diet, physical activity and sport or restful sleep,

i.e. **the highest volume since the introduction of the self-regulation system in this area**.

³ Data relating to all advertising broadcast on DTT channels (excluding rolling news channels and L'Equipe)

Annual volume of hours confirmed by Arcom for all years of the self-regulation system



■ Annual volume of hours confirmed by Arcom (excluding local radio and TV)
— Expon. Annual volume of hours confirmed by Arcom (excluding local radio and TV)

TV channels and radio stations have continued to renew their programme scheduling to remind the French of the importance of a healthy diet, physical activity and a good night's sleep.

Once again, under the impetus of Arcom, editors have lent their support to the actions of the National Collective of Obesity Associations [*Collectif National des Associations d'Obèses*] for World Obesity Day.

Assessment of the influence of healthy lifestyle messages and food marketing communications on under 18s and their parents

A new supplementary survey was carried out among a panel of television viewers to assess the influence of healthy lifestyle messages and commercial communications on under 18s and their parents.

The programme tests carried out this year confirm the findings already mentioned last year: **the influence of these programmes** on the perception of healthy lifestyle recommendations is marked, taking a variety of forms, from **a simple reminder to a tool to help people put the recommendations into practice**. They help with the challenge of a healthy lifestyle in a number of ways:

- **by expressing the rules in force** within the home, giving them legitimacy beyond the family circle;
- **by helping to illustrate and hammer home the main principles** of a healthy lifestyle, which are known but sometimes perceived as a form of utopianism;
- **by enabling these rules to be played down**, which is necessary for influence (as opposed to what could be the refusal of discourse that sounds like an order);
- **by considering and adapting messages for three key audiences**: children, teenagers and parents.

However, some programmes have limitations when it comes to promoting a healthy lifestyle:

- **the appeal of the various programmes is uneven**: some programmes have a very top-down, academic tone, and include theoretical advice that seems to have little application in everyday life;

- **the intention is not always understood**: for programmes aimed at children, particularly on the theme of physical activity and sport, stimulating curiosity is not enough to influence the subject if a link is not explicitly made;
- **the idea of playing things down, taken a little too far, can limit the receptiveness of the message about healthy living**: on the theme of food, programmes relating to the *terroir* [land] sometimes focus more on enjoyment than on balance.

In the commercial communications presented to respondents, **the Nutri-Score** is often too small to be noticed. However, when asked about the criteria that motivate their food purchases, respondents readily cite this indicator. The interests identified are as follows:

- reiterating the importance of the concept of 'health' in food;
- simplifying information on the nutritional quality of the product.

Whereas on television, the influence of commercial advertising can be temporarily mitigated by the appearance of healthy lifestyle messages (such as short prevention programmes), the messages are more difficult to contradict around digital content.

For further reading: www.arcom.fr

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