

Out-of-home advertising

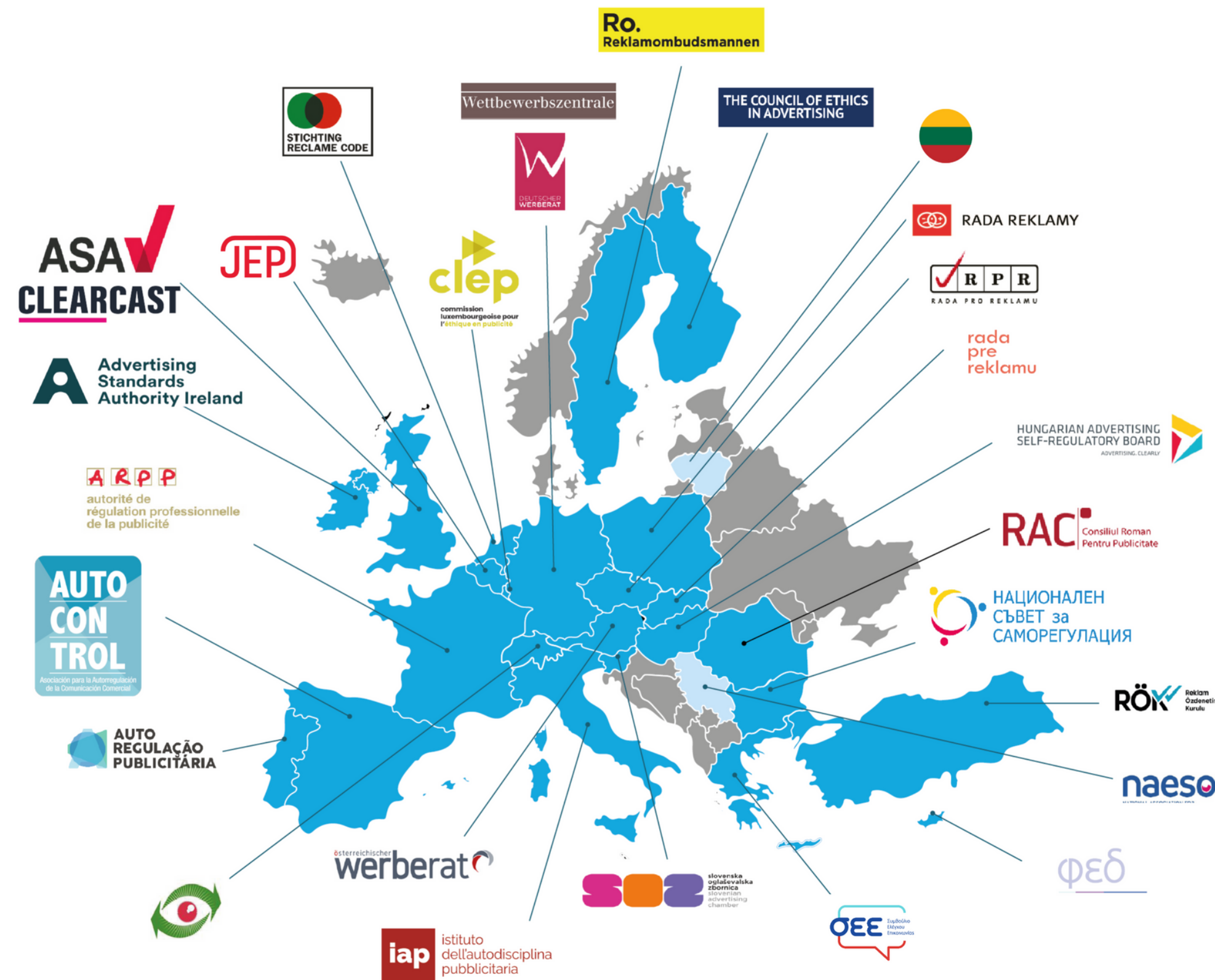
A global & European overview of regulatory and SR trends

JANUARY 2025





EASA brings together 28 ad self-regulatory organizations in 26 European countries inside and outside of the EU, 14 industry organizations representing the advertising value chain and 1 digital pure play company.



How Advertising self- regulation works

Advertising self-regulation is a comprehensive self-regulatory system that is well-balanced and extensive, featuring:



Ad Standards

Robust advertising standards are developed at a national level based on international best practice and global standards such as the ICC code.

Adoption & Review

A system for adoption, review and application of the advertising standards.

Ad Standards Body / SRO

A self-regulatory organization (SRO) is set up and funded to independently monitor and enforce the advertising standards.

What SROs do

Advertising Self-regulatory Organizations work both proactively and reactively to enforce the advertising standards

Advice

Provide Copy Advice /
Pre-Clear Advertising

Complaint handling

Handle consumer and/or
competitor complaints

Development of codes and guidance

in response to evolving
societal values,
technological
advancements

Training

Provide Industry Training

Monitoring

Conduct monitoring
exercises increasingly
with the use of
advanced technologies
such as AI

Sensitive issues & legislative developments

- **HFSS Foods / Marketing to Children**
- **Influencer Marketing**
- **Digital Advertising (incl. AI, privacy...)**
- **Alcohol Advertising**
- **Sustainability / Environmental Claims**
- **Diversity, Equity and Inclusion**
- **Gambling**



Sensitive issues & legislative developments: Focus Europe

Table 2: Table of sensitive issues and subject of legislative developments by European country represented in EASA

Issue/Country	AT	BE	BG	CZ	CY	FI	FR	DE	EL	HU	IE	IT	LT	LU	NL	PL	PT	RO	RS	SK	SI	ES	SE	CH	TR	UK
AI		🔊					🔊			🔊		🔊				🔊				🔊		🔊				🔊
Alcohol	🔊	!			🔊		🔊	🔊		🔊	!				!	🔊				!		!				!
Children	🔊	🔊	🔊	🔊	🔊	🔊	!	!		🔊	🔊				!	🔊	🔊	!			!	🔊				!
Consumer protection		🔊			🔊	!		🔊		🔊					!						!	!			!	!
Cosmetics		🔊														🔊										!
Environmental issues		🔊					!			🔊					🔊	🔊	🔊					!	!	🔊	🔊	!
Food	🔊	🔊	🔊		🔊	🔊	!	!		🔊	🔊				!	🔊	🔊	!				🔊				!
Food supplements			🔊	!					🔊	🔊			🔊			!										
Financial services		!					🔊					🔊			!	!	!					!	🔊			!
Gambling		!	!		!	!	!	!	!	🔊	!				!		🔊	!		🔊	🔊	!				!
Gender and diversity	🔊	🔊			🔊					!			!													🔊
Influencer Marketing		!			🔊	🔊	!	!		!	🔊	🔊	🔊		🔊	🔊	🔊			🔊	🔊	!	🔊		🔊	🔊
Online Advertising /Data protection	🔊						!	!			🔊		🔊					!			🔊	🔊		🔊		!
Pharmaceuticals							🔊		!	🔊												!				🔊
Miscellaneous		🔊	!	🔊			🔊	!		!	🔊	🔊				🔊				🔊	🔊	!	!	!		🔊

Key:

🔊	Sensitive issue
!	Legislative development

Sensitive issues & legislative developments in Europe

European Union updates

EASA monitors regulatory developments and EU institution's priorities and focus areas

- In Von der Leyen's political guidelines, "competitiveness and defense" are the two main pillars that will likely structure the new Commission agenda
- No specific mention of advertising or self-regulation
- Commission's Beating Cancer Plan, DSA & DMA enforcement, tackling online addictive designs, and AI Act implementation may be policy files that will impact the advertising space
- Protection of children is also a particular area of focus relevant to advertising

Pending legislation at the EU level:

- Green claims: transposition of the Empowering Consumers for the Green transition directive, Green Claims directive
- AVMSD review due by end 2026, possible revision of the directive
- AI Act
- HFSS food & beverage products
- Gender stereotyping



HFSS Advertising



New Zealand: A complaint was raised against McDonald's digital poster ads, arguing they normalized intoxication and could offend individuals with speech impediments. However, the NZ Complaints Board dismissed the complaint, concluding that the ads did not promote harmful practices or cause significant offense.

- **Australia:** Calls for restrictions on all junk food marketing across media platforms and outlets between 5.30am and 11pm
- **Canada:** A private member's bill on limiting marketing to kids, Bill C-252 is making its way through Parliament. It will impact the restriction of food ads in print and digital OOH.
- **Colombia:** Colombia introduced Law 306/2024 imposing strict HFSS ad restrictions. Including a watershed in TV and radio, content bans, and placement restrictions.
- **UK:** Junk food TV advertisements to be banned from airing before the 9pm watershed. In addition, online ads for HFSS products will be banned altogether. Not regulating outdoor ads is considered a "missed opportunity". (The Mayor in London had already banned all HFSS ads on the entire Transport for London network since Feb 2019)

Pressures also in Saudia Arabia, South Africa, Malaysia, Norway, Thailand...

HFSS Foods & Beverages Marketing to Children discussion to focus increasingly on Ultra Processed Foods (UPF)



ENGAGING WITH THE FOOD AND BEVERAGE INDUSTRY
UNICEF Programme Guidance (2023):

“The practices and products of a subset of the F&B industry whose primary business is the production, distribution, marketing and retailing of ultra-processed foods and beverages (UPF) pose particular concern.

The companies producing these unhealthy, nutrient- poor UPF – rich in sugar, salt, trans-fats and food additives and preservatives – are major drivers of today’s broken food system and the global epidemic of childhood overweight and obesity and diet-related non-communicable diseases,[...]

Evidence shows that direct partnering with the UPF industry (i.e., working with) and voluntary UPF industry initiatives do not translate into large-scale sustainable results in transforming food systems for children.

THE LANCET Regional Health Americas

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A policy approach to identifying food and beverage products that are ultra-processed and high in added salt, sugar and saturated fat in the United States: a cross-sectional analysis of packaged foods

Barry M. Popkin ^{a,c} • Donna R. Miles ^c • Lindsey Smith Taillie ^{a,c} • Elizabeth K. Dunford ^{a,b}

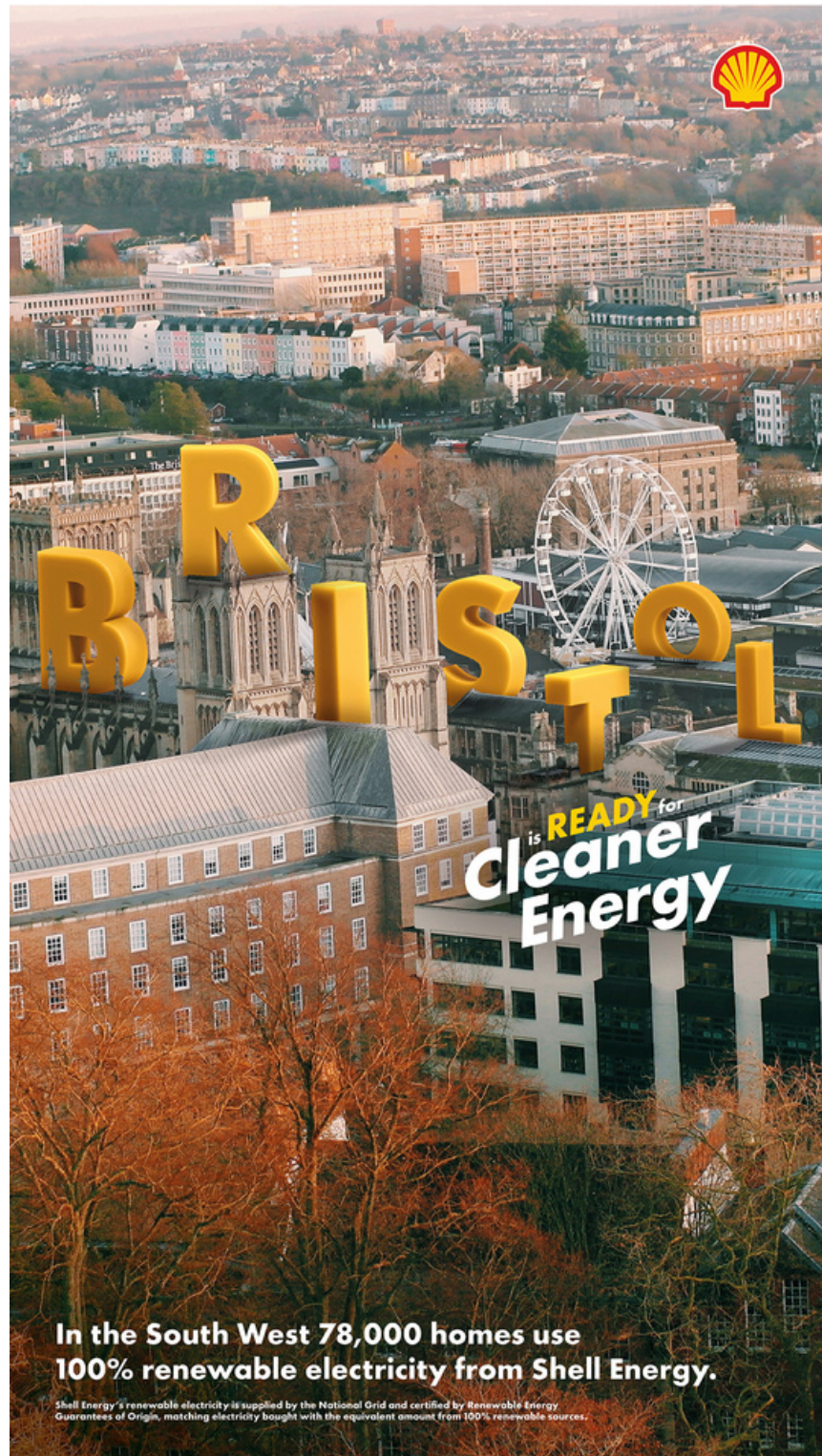
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Summary

Background

Governments globally aim to reduce the intake of unhealthy foods. Many policies exist that aim to address foods high in saturated fat, salt and sugar (HFSS) but the identification of ultra-processed foods (UPF) have presented a greater challenge due to the lack of an appropriate policy definition. To support policymakers, we provide approaches that can support governments to identify both HFSS foods and UPFs.



UK: A poster ad for Shell misleadingly omitted material information about the proportion of their business activities that were comprised of lower carbon activities. The ASA concluded that the ad was likely to mislead.

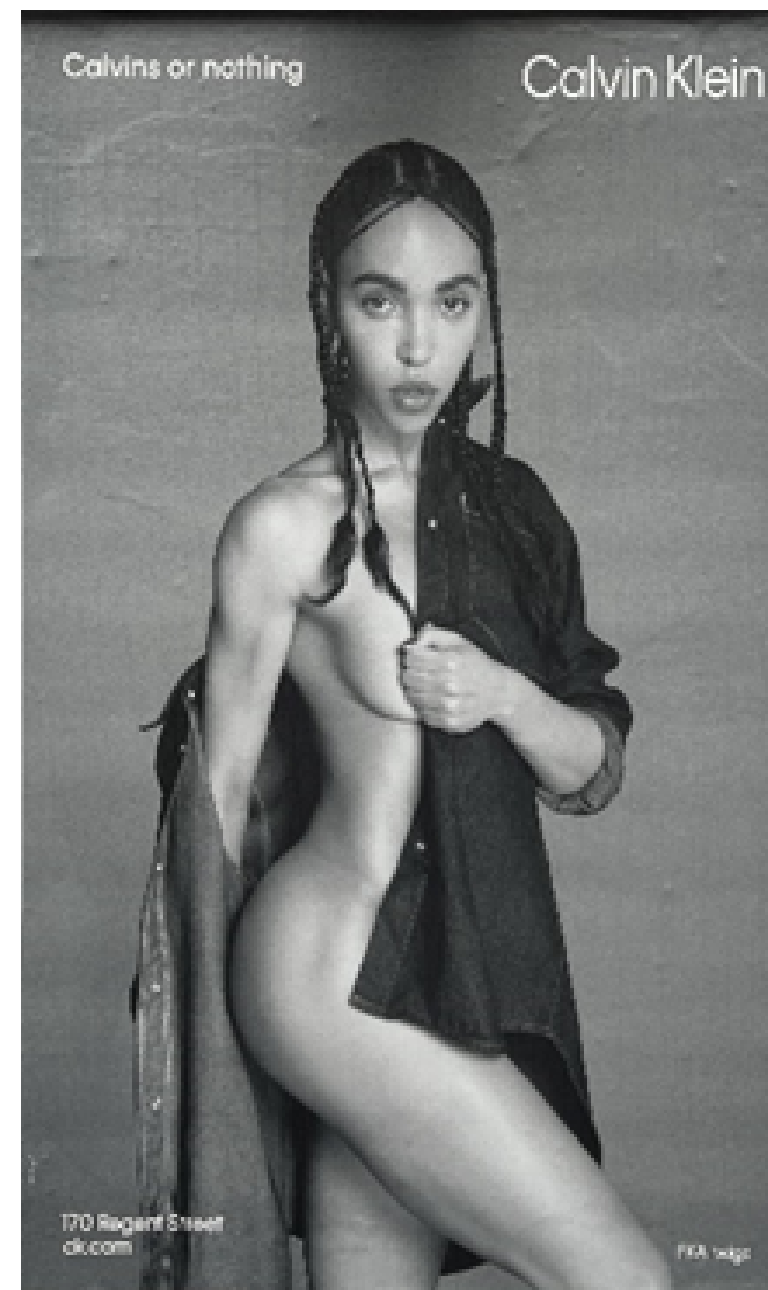
Sustainability

- **France:** The 2021 Climat-Résilience introduced regulatory tools impacting OoH advertising: e.g. a general ban on highly polluting products and practices. From 2028, ads for the most polluting cars will be banned. Also, Aerial OoH advertising trailed by a plane is prohibited.
- **The Netherlands:** The Hague has prohibited advertisements in public spaces for products related to fossil fuels. Ads for long-haul flights, combustion-engine cars, cruise vacations, and polluting energy contracts will no longer be allowed in public spaces.
- **Sweden:** Stockholm Municipality is reviewing their Guidelines on Advertising in public transports. Specific areas for investigation are the possibility of stricter gambling advertising, fossil fuel advertising and online doctors' advertising.
- **UK:** Edinburgh recently became the latest UK city to ban ads for fossil fuels and other high-carbon products — including those from airlines, airports, cruise ships and personal vehicles including SUVs, and petrol- and diesel-powered cars.

“Many governments restrict or prohibit advertising for products that harm human health, like tobacco,” he said. “I urge every country to ban advertising from fossil-fuel companies. And I urge news media and tech companies to stop taking fossil-fuel advertising.”

António Guterres, UN Secretary General. June 2024

Diversity, Equity and Inclusion



- **Belgium**: A specific co-regulatory code of conduct on sexist, hypersexualised and gender-stereotyped advertising has been published, following discussions (Belgian SRO JEP was invited as expert).
- **Sweden**: Increase in complaints about advertising that features models who are excessively thin.
- **United Kingdom**: CAP publish an update statement on their review into the use of digitally altered images in advertising and the potential harmful impact on body image.

DEI and ESG efforts continue to be under pressure. The Ad Industry needs to increasingly navigating divisive audiences

Politics

The Brief – Expect an anti-woke wave

The French National Rally warns of “the danger of wokeism” and fighting “woke ideology” to attract voters.

Disclaimer - All opinions in this column reflect the views of the author(s), not Euractiv Media.



US President Donald Trump issued executive orders shortly after he was sworn in to change the US government's policies on gender and diversity, following through on promises he made on the campaign trail.

He rolled back orders from the Biden administration that the Trump White House called "unpopular, inflationary, illegal, and radical practices within every agency and office of the Federal Government".

“Several large US companies have ended or scaled back their DEI programmes since Trump was elected, including McDonald's, Walmart and Facebook parent company Meta.”

The growing backlash to DEI and ESG in the U.S. is affecting Canadian companies as well

DAVID MILSTEAD >
JEFFREY JONES > ESG AND SUSTAINABLE FINANCE REPORTER
INCLUDES CORRECTION
PUBLISHED YESTERDAY

AI and Automation Ethics in Advertising

Misuse of AI-generated deepfakes, biases in algorithms, the proliferation of dark patterns privacy concerns will challenge regulators and industry leaders.

FTC Report Confirms: Commercial Surveillance is Out of Control

BY LENA COHEN | SEPTEMBER 26, 2024



A [new Federal Trade Commission \(FTC\) report](#) confirms what EFF has been warning about for years: tech giants are widely harvesting and sharing your personal information to fuel their online behavioral advertising businesses. This four-year investigation into the data practices of nine social media and video platforms, including Facebook, YouTube, and X (formerly Twitter), demonstrates how commercial surveillance leaves consumers with little control over their privacy. While not every investigated company committed the same privacy violations, the conclusion is clear: companies prioritized profits over privacy.

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Anti-spam question: Enter the three-letter abbreviation for Electronic Frontier Foundation:

The US Federal Trade Commission (FTC) **strongly criticized the ad industry’s data practices** in a report released in September, saying social media and streaming platforms have created a “**commercial surveillance ecosystem**” that collects a “staggering” amount of personal info and fails to protect user privacy. In the nearly 130-page report, **the agency calls for broad regulation of the advertising industry**, saying “self-regulation has been a failure.”

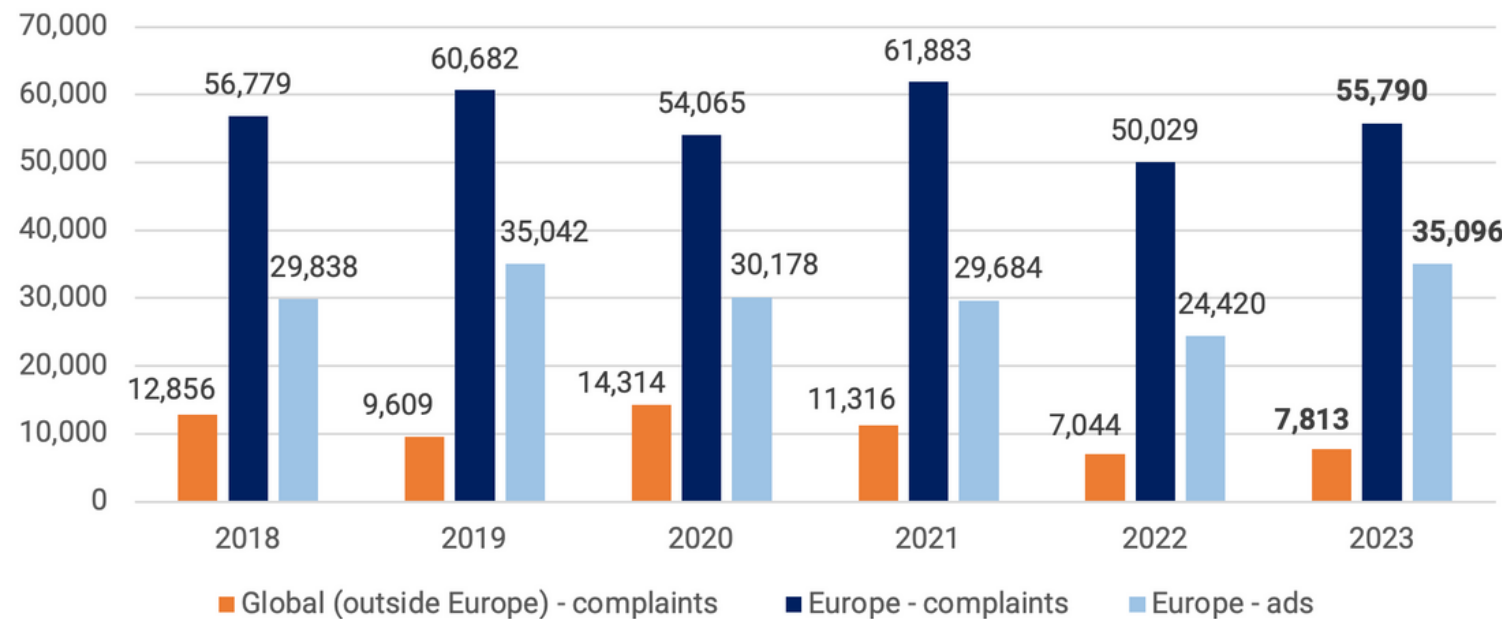


Ursula von der Leyen, President of the new European Commission, in her Mission Letter to the Commissioner for Democracy, Justice, and the Rule of Law, tasked him with “develop[ing] a Digital Fairness Act to **tackle unethical techniques and commercial practices related to dark patterns, marketing by social media influencers, the addictive design of digital products and online profiling**, especially when consumer vulnerabilities are exploited for commercial purposes”, essentially covering the same issues raised in the report.

Complaints Data across the Globe VS Ad Spend Figures

In 2023, SROs across the EASA and ICAS networks received a total of 2,291 complaints and 986 distinct involving outdoor advertising. Complaints about outdoor advertisements worldwide are proportionate to global advertising spend, reflecting similar patterns of investment and public response across markets.

Figure 1: Number of complaints received across the world and Europe from 2018 through 2023, and the number of ads complained about in Europe during the same period



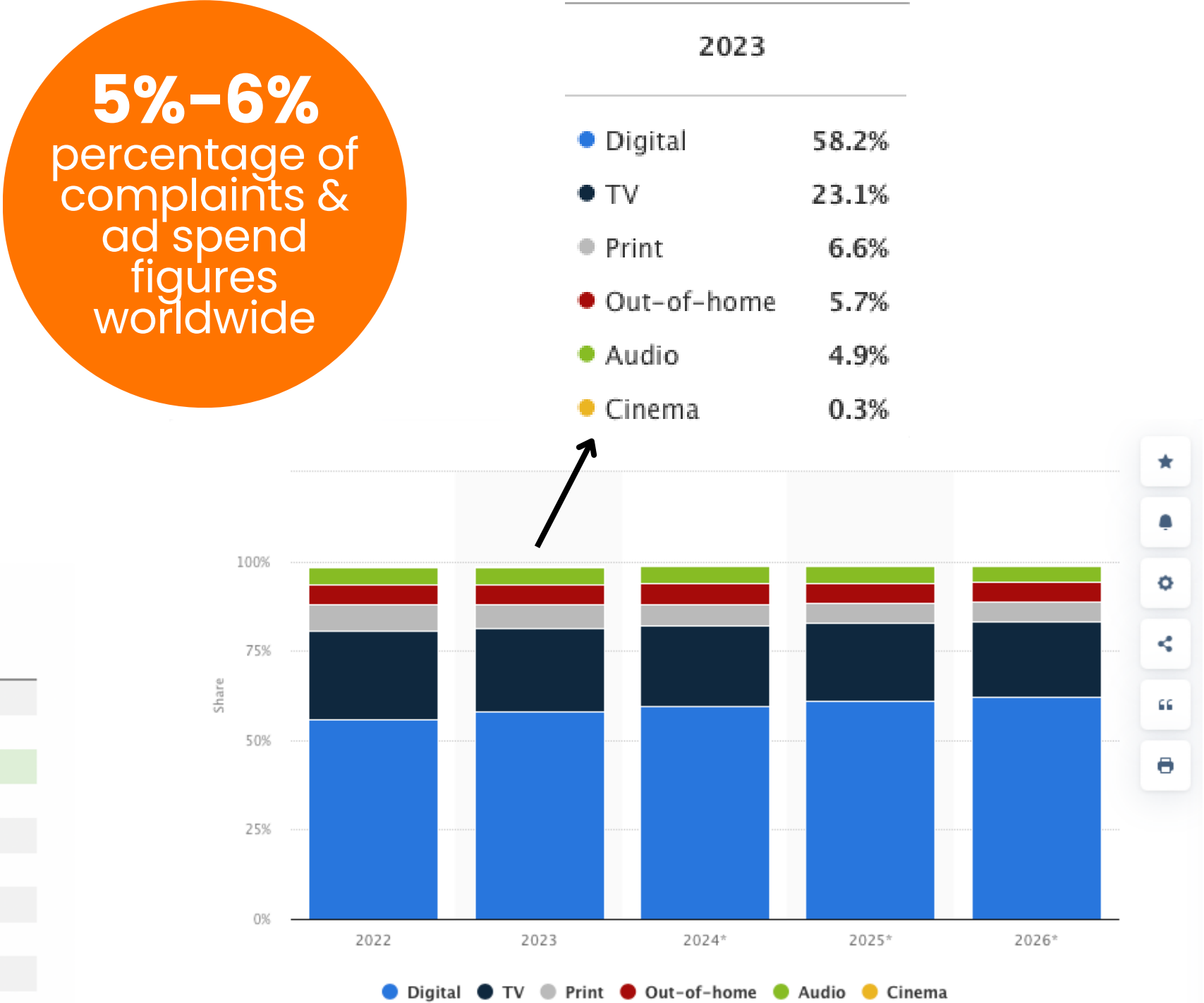
Source: EASA European SRO member statistics and ICAS global SRO member statistics 2018-2023

Table 3: Share of complaints received per media type across Europe from 2018 through 2023 (European total average)

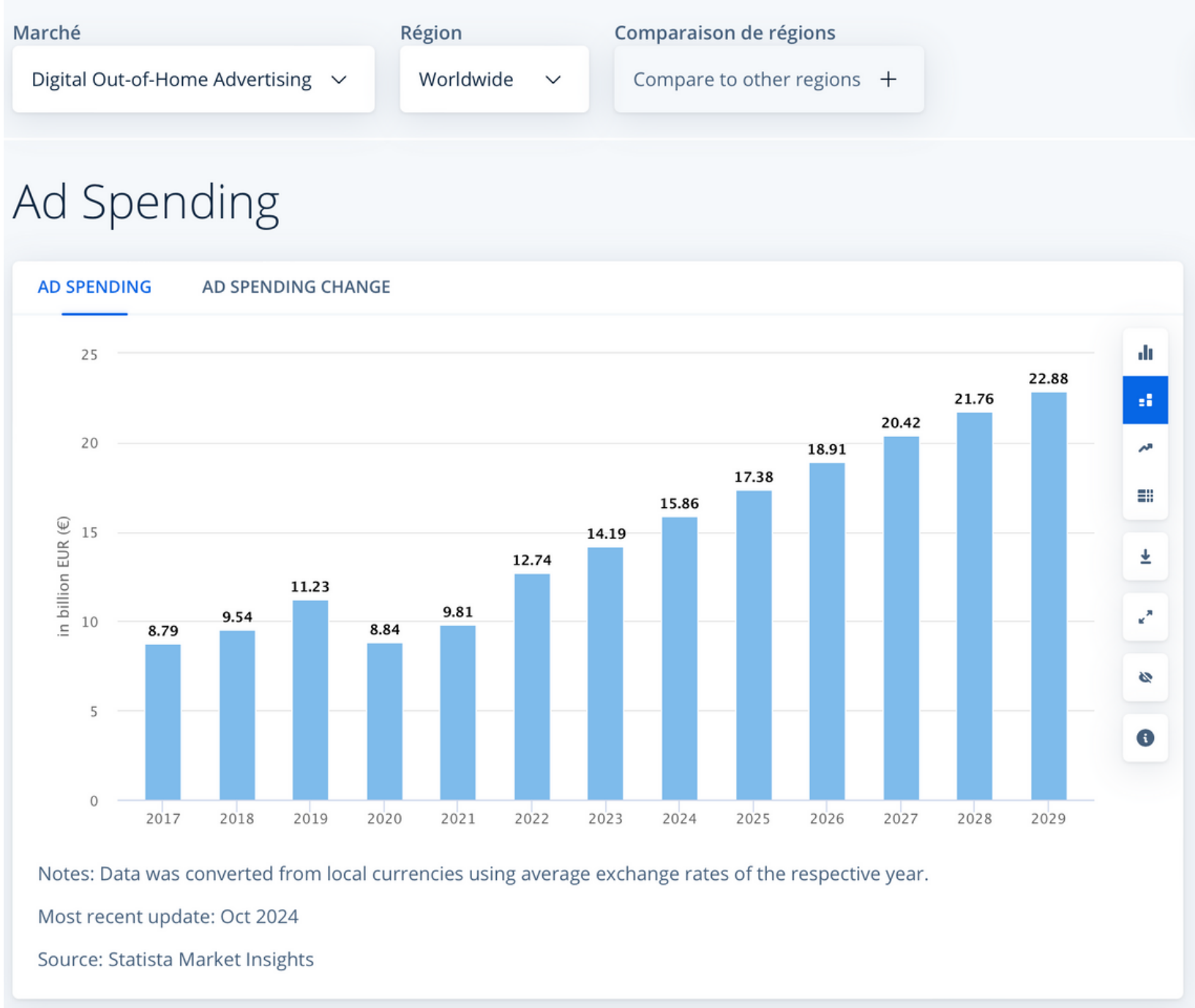
	2018	2019	2020	2021	2022	2023	Average
Online advertising	43,0%	42,0%	46,0%	44,0%	51,0%	50,0%	46,0%
Television	33,0%	28,0%	35,0%	39,0%	31,0%	38,0%	34,0%
Outdoor	7,0%	7,0%	5,0%	3,0%	6,0%	4,0%	5,3%
Radio	3,0%	3,0%	2,0%	2,0%	2,0%	3,0%	2,5%
Brochures/Leaflets	2,0%	2,0%	1,0%	1,0%	3,0%	2,0%	1,8%
Press/Magazine	5,0%	5,0%	5,0%	3,0%	1,0%	2,0%	3,5%
Direct marketing	5,0%	5,0%	4,0%	3,0%	4,0%	1,0%	3,7%
Packaging/Labels	1,0%	1,0%	1,0%	1,0%	1,0%	0,4%	0,9%
Other	1,0%	7,0%	2,0%	4,0%	3,0%	3,0%	3,3%

Source: EASA European SRO member statistics 2018-2023

Distribution of advertising spending worldwide from 2022 to 2026, by medium



As global ad spend in OOH media continues to grow, it is increasingly important to prioritize responsible advertising practices.

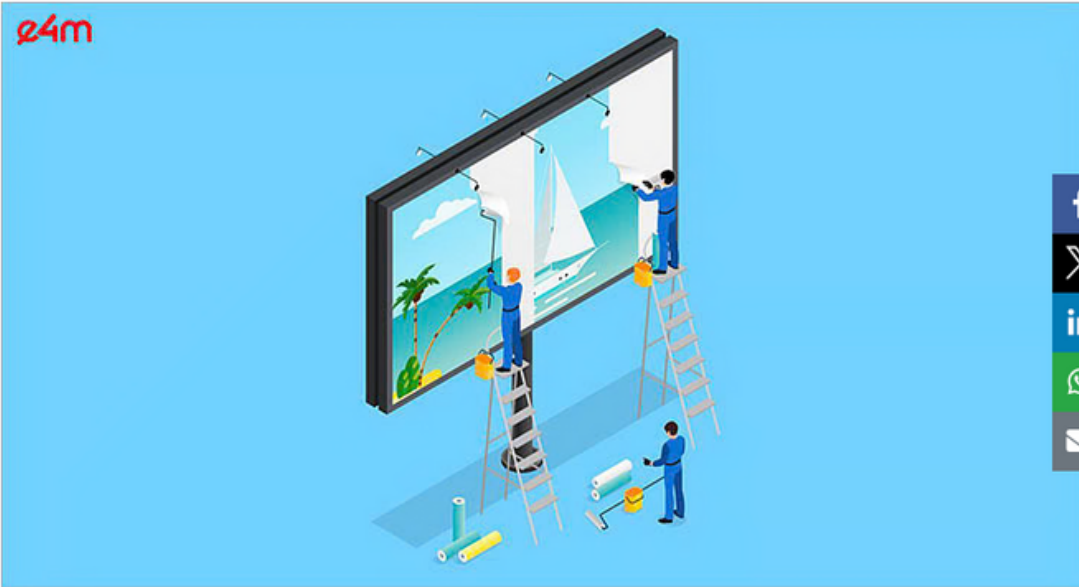


South DOOH revolution: By 2025, 40% ad spend growth likely to come from digital screens

Robust infrastructure, tech integrations and AI-powered dynamic creatives are expected to propel the growth of DOOH in the region

by Jagruti Verma

Published: Nov 26, 2024 9:33 AM | 4 MIN READ



The Out-of-Home (OOH) advertising landscape in the South India market is undergoing a major transformation, driven primarily by the rapid rise of Digital OOH (DOOH) and the region's evolving urban infrastructure. With the integration of robust technologies like AI-powered dynamic creatives, real-time content management, and programmatic advertising, the region's DOOH could account for 30-40 per cent of total ad spending in the region in 2025, said experts.

The Digital Out-of-Home Advertising market is experiencing significant growth worldwide, driven by changing customer preferences and advancements in technology.

OUT-OF-HOME ADVERTISING

A GLOBAL & EUROPEAN STUDY OF REGULATORY
AND SELF-REGULATORY TRENDS



2023 REPORT FOR THE WORLD OUT OF HOME ORGANIZATION

ICAS-EASA Report

Includes information:

- on ICAS, EASA and how SR works
- legislative developments and sensitive issues at national level across Europe and key ICAS markets
- relevant EU files for the OOH sector
- complaints data for 2023
- examples of cases handled by SROs

The report is an update of a 2021 report and will be finalized soon.

Thank You!

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