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2010 Compliance Monitoring Report
For the International Food & Beverage Alliance

On Global Advertising in Television, Print and Internet

March 2011

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Introduction

Accenture Media Management has been commissioned by the International Food & Beverage Alliance (IFBA) to produce this report on behalf of its members: The Coca-Cola Company, Ferrero, General Mills, Grupo Bimbo, Kellogg's, Kraft Foods, Mars, Nestlé, PepsiCo and Unilever.

IFBA is a group of leading food and non-alcoholic beverage companies with a presence in over 200 countries worldwide who share a common goal of helping consumers in all nations to achieve balanced diets and healthy lifestyles. In May 2008, they committed to five actions in support of the World Health Organization's 2004 *Global Strategy on Diet, Physical Activity and Health*, including a commitment to extend their existing policies on responsible advertising and marketing to children, globally.¹ In practice, this means changing the way they advertise to children so as to emphasize better-for-you choices and promote physical activity. IFBA members also committed to third-party monitoring of the implementation of this commitment globally.

In September 2010, IFBA engaged us to monitor its members' compliance in television, print and internet advertising with their stated global marketing and advertising to children policy:

IFBA members have committed to only advertise products to children under 12 years of age that meet specific nutritional criteria based on accepted national and international evidence and/or applicable national and international dietary guidelines; or to not advertise products to children under 12 years at all. For the purpose of this initiative, "advertising to children under 12 years" means advertising to media audiences with a majority of children under 12 years.

In 2009 we conducted a similar monitoring exercise. This report presents both the 2010 results and a comparison of the results with 2009.

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¹ For more information, please see <https://www.ifballiance.org/>

Overall Methodology

We independently monitored eight markets for television advertising, five markets for print advertising and four markets for internet advertising. We conducted the monitoring exercise as a random sample of the companies' advertisements. The exercise covered the period 1 April – 30 June 2010 and was carried out in the second half of 2010.

All the media research data analyzed in order to produce this report was gained from sources independent of the advertisers and their associated media agencies. Accenture chose the period to be monitored after the advertising had already been purchased by the companies.²

To monitor compliance with television advertising we:

- Examined all advertising spots³ for products marketed by IFBA members aired in the selected markets;
- Reviewed those spots for products not meeting criteria for advertising to children against product lists supplied by IFBA members;
- All spots were included for companies that do not advertise any of their products to children under 12;
- Analysed audience composition at the time of broadcast in order to identify those spots aired when the majority of the audience was composed of children under 12 years of age⁴;
- Counted these spots as non-compliant with the IFBA policy.

For print advertising, we isolated all print publications targeting children under 12 years of age in the selected markets, and reviewed each of these to determine if any of these contained any advertising by IFBA members.

There is no reliable demographic audience data for many websites. Therefore, we developed a sample list of child-targeted websites for the selected markets, and performed a manual check during a three-week period on each website to assess compliance.

² Grupo Bimbo's activities are not covered in this report since the IFBA commitment did not apply until August 2010, after the monitored period. In the case of Ferrero, only Mexico was monitored as the IFBA commitments will not become fully applicable to Ferrero in other markets until the end of 2011. For PepsiCo, the monitoring covered beverages only as the commitment on snacks did not apply until January 2011.

³ Spot means each individual advertising activity, i.e. the airtime used by the advertiser.

⁴ In India and Saudi Arabia the age threshold data analysed by Accenture was under 14 years of age instead of 12 years. This is because the data available to media agencies in those countries is under 14 years.

Summary of Key Results

A. 2010 Compliance Rates

Television: overall compliance rate is 96.0%

This result is based on the review of nearly one million food and non-alcoholic beverage advertising spots (929,855) promoting products by IFBA members broadcast in Chile, China (Beijing region), India, Mexico, Russia, the Kingdom of Saudi Arabia, the Philippines and South Africa during the monitoring period. Instances of non-compliance represent all spots for products not meeting IFBA members' nutritional criteria aired at a time when the reported audience share of children under the age of 12 exceeded 50%.

37,382 instances of non-compliance were identified. Of these, a high proportion were spots aired during general viewing times and not on children's programmes which produced profiles of more than 50% of the audience being under 12 years of age. These are statistical anomalies due to small audience sizes. In most cases, these spots had ratings below 1 Gross Rating Point (GRP) for children, meaning less than 1% of the under-12 years of age viewing population.⁵ Nonetheless, these spots were considered to be non-compliant.

Print: overall compliance rate is 100%

For the purposes of this verification, five sample markets were chosen: China, India, Mexico, the Philippines and South Africa. Over 100 publications were analyzed for advertisements targeting children under 12 years of age. We did not find any advertisements among these publications that promoted products of IFBA members in the countries analyzed.

Internet: overall compliance rate is 100%

For the purposes of this verification, four sample markets were chosen: India, Mexico, Russia and South Africa. We did not find any non-compliant advertisements for products advertised by IFBA members on any of the websites reviewed.

⁵ Gross Rating Points (GRPs) measure the size of an audience reached by a specific media vehicle or schedule. The small audience size means that the reported audience share data is statistically not reliable. Audience data can be skewed if even very few viewers that are part of the measurement panel misreport their viewing (e.g. reporting a child under 12 years of age watching instead of an adult in a given household).

B. Comparison with 2009 Results

In 2009, the compliance monitoring exercise was conducted in Argentina, Canada, China (Shanghai region), India, Indonesia, Mexico, New Zealand, Russia, South Africa, Thailand, Ukraine and the U.S.A. In 2010, in addition to the new markets we monitored, we repeated compliance monitoring in four of these markets to get a comparison – India, Mexico, Russia and South Africa.

The overall compliance monitoring results are comparable year-on-year – between 94% and 100% for television and 100% for print and internet advertising. Overall variances are marginal. (See Fig. 2 on page 9).

Television Compliance Monitoring 2010

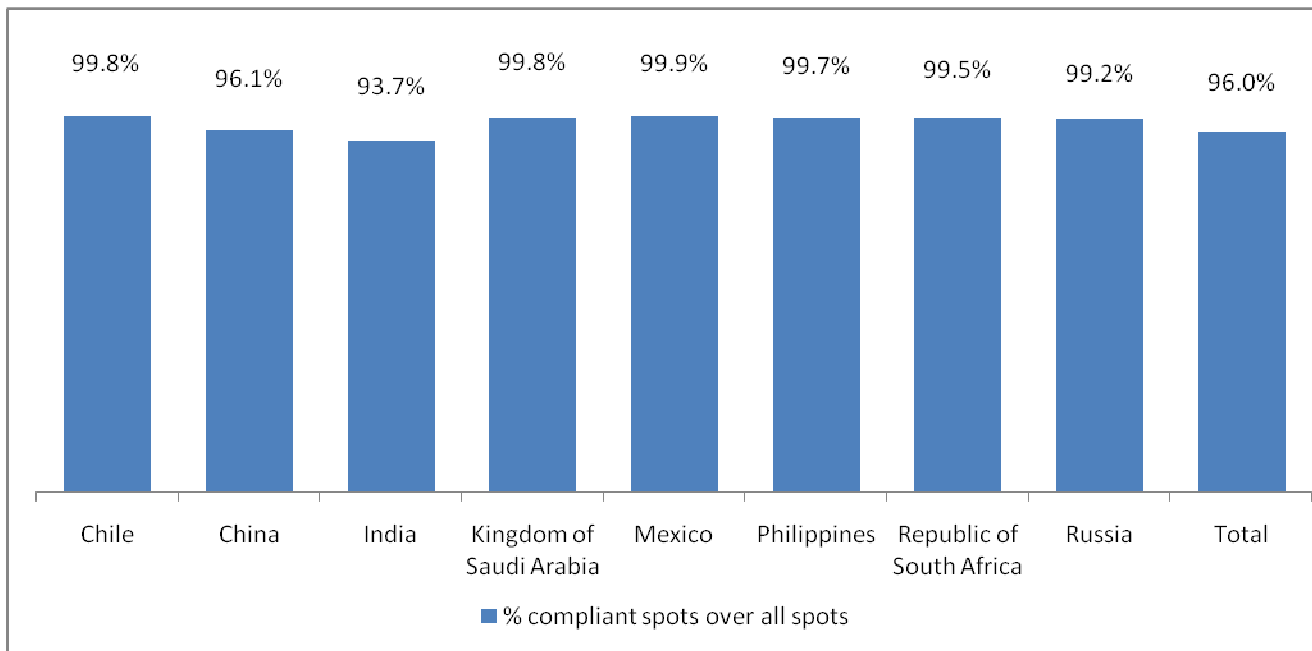
Methodology

- For the purposes of this verification, eight sample markets were chosen: Chile, China (Beijing Region), India, Kingdom of Saudi Arabia, Mexico, Philippines, Republic of South Africa and Russia. *(See Appendix 1 for a list of the monitored television channels)*
- All spots by IFBA member companies aired in the eight markets from 1 April to 30 June were collected. Total sample size: 929,855 spots.
- Spots for products that do not meet IFBA companies' nutritional criteria, where applicable (some member companies do not advertise any products to children under 12 years of age), were identified on the basis of product lists supplied by companies.
- Audience composition at the time each spot was aired was analysed on the basis of national ratings data. This allowed us to identify advertisements aired in and between programmes with an audience in which the majority were children under 12 years of age.⁶
- All spots for products that IFBA member companies have committed not to advertise to children under 12 years of age, aired at times when the audience was composed of a majority of children under 12 years of age, were deemed non-compliant.

⁶ In India and Saudi Arabia the age threshold data analysed by Accenture was under 14 years of age instead of 12 years. *(See footnote 4)*

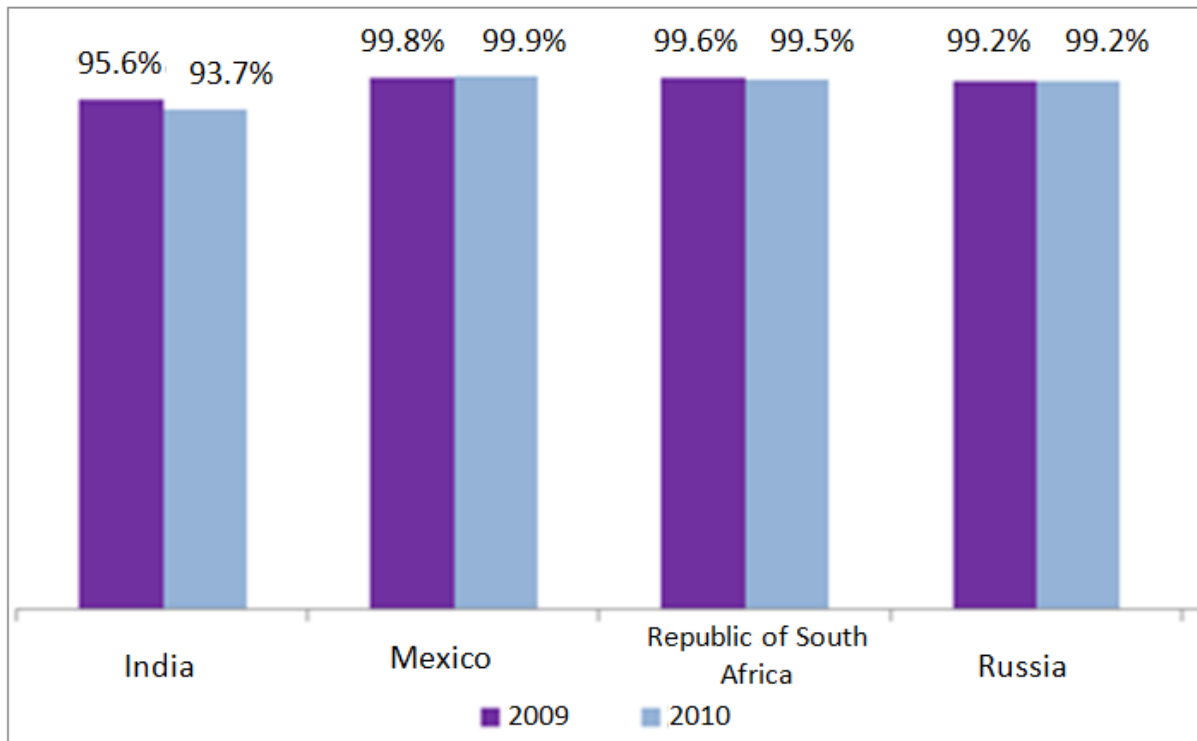
Results

Fig. 1: Television Overall Compliance Results (All spots included) (2010)



Measuring Change: Trends in IFBA Member Companies' Television Advertising

Fig. 2: 2009 vs. 2010 Compliance Results (All Spots)



When looking at all spots, we can see that overall compliance rates are broadly stable in the markets monitored in both years, with India showing a slight decline. However, when spots with an under-12 years of age audience with less than 1 GRP are excluded, the 2010 compliance rate in India is actually higher in 2010 than in 2009. For all other countries compliance rates remain stable.

Print Compliance Monitoring

Methodology

- For the purposes of this verification, five sample markets were chosen: China, India, Mexico, the Philippines and South Africa.
- As age-specific readership data for children's print titles is not available, Accenture prepared a list of children's titles in four of the five monitored markets on the basis of national genre classifications used in the media industry. (See *Appendix 2 for a list of the monitored print titles*)
- In Mexico, Accenture gathered the full lists of all printed publications where IFBA members published commercial communications in the period 1 April – 30 June and analysed whether any of these publications were aimed at children under 12 years of age.
- There was no data available for children's titles in the following markets: Chile, Russia and the Kingdom of Saudi Arabia.
- Using advertising data from national monitoring agencies (databases of all advertisements placed in print titles), Accenture reviewed these publications for advertisements for products that IFBA member companies have committed not to advertise to children under 12 years of age.
- Any advertisement for such products in any of these titles was deemed non-compliant.

Results

Print Advertising: All monitored markets (China, India, Mexico, the Philippines and South Africa) were 100% Compliant.

Internet Compliance Monitoring

Methodology

- For the purposes of this verification, four sample markets were chosen: India, Mexico, Russia and South Africa.
- A list of younger children's websites in each of the four monitored markets was compiled by Accenture's local offices to represent a sample of child-oriented websites. *(See Appendix 3 for a list of the monitored websites)*
- The websites were accessed over a period of three weeks to check for advertising content relating to the non-compliant products from IFBA members.
- Any advertisement for such products in any of these websites was deemed non-compliant.

Results

Internet Advertising: All monitored markets (India, Mexico, Russia and South Africa) were 100% Compliant.

Appendix 1: Television Channels Monitored

Chile

Red Television Ch4
 Univ Catolica Ch13
 Television Nac Ch7
 Mega Ch9
 Chilevision Ch11
 Telecanal Ch2
 UCV Television Ch5

China

Beijing Satellite
 Beijing TV Entertainment Channel
 Beijing TV Science and Education Channel
 Beijing TV Film and TV Series Channel
 Beijing TV Sports Channel
 Beijing TV Life Channel
 Beijing Kaku Cartoon Satellite Channel
 Beijing TV Finance and Economics Channel
 Beijing TV Children's Channel
 Beijing TV Public Service Channel

India

9X M
 24 Ghanta TV
 9X
 Aaj Tak
 Aakaash (Bangla)
 Adithya TV
 Amrita TV
 Animal Planet
 Asianet / Asianet Plus
 AXN
 B4U Music
 Bindass
 Cartoon Network
 Channel V
 Chintu TV

Chutti TV
 CNBC AWAAZ / TV18
 CNN IBN
 Colors
 DD Delhi/News/Punjabi
 DD1
 DD10 Sahyadri (Marathi)
 DD16 Lucknow
 Dilli Aaj Tak
 Disney Channel / XD
 E 24
 Eenadu TV(ETV Telugu)
 ESPN
 ETC Punjabi
 ETV Bangla
 ETV Kannada
 ETV Marathi
 ETV2 Telugu News
 FILMY
 Fox History & Entertainment
 Gemini Comedy
 Gemini Movies
 Gemini Music
 Gemini News
 Gemini TV
 HBO
 Headlines Today
 HM TV
 Hungama TV
 IBN 7
 Imagine TV / Showbiz
 India TV
 Isaiyaruvi
 Jaya Max
 Jaya TV
 Kairali
 Kalaignar TV
 Kasturi
 Kiran TV

KTV
Kushi TV
Maa Music
Maa Telugu
Mahuaa TV
Manoranjan TV
MAX
Mega TV
MH1
MH1 News
Mi Marathi
MTV
Music India
National Geographic
Channel
NDTV 24x7 / Good Times
Neo Cricket
News Live
Nickelodeon
PIX
POGO
Raj Digital Plus
Raj Musix
Raj TV
Rupashi Bangla
SAB
Sahara One
Sakshi TV
Sangeet Bangla
Siripoli
Sony Entertainment TV
Star Gold
Star Jalsha
Star Movies
Star News
Star One
Star Plus
Star Pravah
Star Utsav
Star World
Sun Music

Sun TV
Surya TV
Suvarna
Tara Muzik
Tarang
TLC
U2
Udaya Movies
Udaya TV
UTV Action / Movies
VH1
Vijay TV
World Movies
Zee Bangla
Zee Cafe
Zee Cinema
Zee Kannada
Zee Marathi
Zee News
Zee Studio
Zee Talkies
Zee Telugu
Zee TV
Zing
Zoom

Kingdom of Saudi Arabia

ABU DHABI AL OULA
AL ARABIYA
AL MEHWAR
AL RAI
DUBAI ONE TV
DUBAI TV
ESC
FATAFEAT
FOX MOVIES
FOX SERIES
LBC SAT
MAZZIKA
MBC 1
MBC 2

MBC 3
MBC 4
MBC ACTION
MBC MAX
MELODY AFLAM
MELODY ARABIA
MELODY HITS
ROTANA CINEMA
ROTANA CLIP
ROTANA KHALEEJIAH
ROTANA MUSIC
SAMA DUBAI
SAUDI SPORT
SAUDI TV 1
SPACETOON ARABIC

Mexico

9 GALAVISION
A&E MUNDO
AXN
CANAL 2
CANAL 5
CANAL 7
CANAL 13
CANAL 52
CARTOON NETWORK
DISCOVERY CHANNEL
DISCOVERY KIDS
DISNEY XD (JETIX-FOX KIDS)
E! ENTERTAINMENT
ESPN

Philippines

ABC/TV5
ABS-CBN
AXN-NET
BTV
CARTOON NETWORK
DISNEY CHANNEL
GMA
JACK TV
NICKELODEON-NET

QTV 11
RJTV
SBN
SOLAR SPORTS-NET
SOLAR TV (RPN)
STAR WORLD
STUDIO 23

Republic of South Africa

Africa Magic
BBC Entertainment
BBC Lifestyle
Boomerang
Cartoon Network
E! Ent
e-TV
KykNET
Magic World
M-Net
M-Net Action
M-Net Movies1
M-Net Movies2
M-Net Series
M-Net Stars
Nickelodeon
SABC1
SABC2
SABC3
Sony Entertainment
Style Network
Universal Channel
Vuzu
Africa Magic +
Animax
BBC World
Channel O
CNN
Crime & Investigation
CSN
Discovery
E News

MK
MTV
MTV Base
National Geographic
Soweto
SuperSport 1/2/3/4/6/7

Russia

2X2
DTV
MTV
MUZ TV
NTV
PERVY KANAL
REN TV
ROSSIYA 1
ROSSIYA 2
STS
TNT
TV TSENTR
TV-3
7TV
DOMASHNY
PYATY KANAL
ZVEZDA

Appendix 2: Print Titles Monitored

China

Children Fun—Kaku Cartoon
Blue cat global adventure
Mickey mouse
Garden Baby
Children Fun—Barbie

India

Ambiliammavan
Ambuliamama
Anandamela
Balahumi
Balarama
Balhans
Champak
Chandamama
Chandoba
GoKulam
GoAdventurer
Jahnamamu
Nandan
Suktatra

Philippines

Playhouse Disney
Disney High School Musical
Disney Princess
K-Zone

Republic of South Africa

Barbie Magazine
Boyz
Bratz Magazine
Camp Rock
Disney and Me
Disney High School Musical
Envirokids
Foschini Kids SuperClub Magazine
Hannah Montana
Hoezit!
MiniMag
National Geographic Kids
Noddy Magazine
Play On
Playhouse Disney
Primary News: Durban
Princess
Princes

In Mexico, Accenture gathered the full lists of printed publications where IFBA members published commercial communications in the period 1 April – 30 June. Below is a list of those titles. This list does not contain any children's titles.

Mexico 2010 IFBA Members Print Title List		
15 A 20	EXCELSIOR	OK!
AUTOMOVIL	EXPRESS MAS NOT MTY.	PADRES E HIJOS
PANAMERICANO	FAMILIA SALUDABLE	PUBLIMETRO
BALANCE	GENTE Y LA ACTUALIDAD	QUIEN
BUENHOGAR	GLAMOUR MEXICO	QUO
CARAS	GQ MEXICO	RECORD DIARIO DEPORT
CHILANGO	IN STYLE MAGAZINE	REFORMA
CINE PREMIERE	INFASHION	SELECCIONES
CINEMANIA	KENA	SPORT LIFE
COCINA FACIL	KENA ESPECIAL	TENDENCIAS
CONOZCA MAS	LA JORNADA	TU
COSMOPOLITAN DE MEXICO	LA PRENSA	TV NOTAS
EL GRAFICO	MARIE CLAIRE	TV Y NOVELAS
EL INFORMADOR JAL	MEN'S HEALTH EN ESPANOL	VANIDADES
EL NORTE MTY.	MI BEBE Y YO	VANIDADES ESPECIAL
EL OCCIDENTAL JAL	MILENIO DIARIO MTY	VEINTITANTOS
EL UNIVERSAL	MURAL JAL.	VOGUE MEXICO
ELLE	MUY INTERESANTE	WOMEN'S HEALTH EN ESPANOL
ERES	NATIONAL GEOGRAPHIC	
ESQUIRE	EN ES	
ESTO	NUEVA	

Appendix 3: Websites Monitored

India

www.cartoonnetworkindia.com
<http://www.pogo.tv/>
<http://www.disney.in>
<http://www.hungamatv.com>
<http://kids.discovery.com>
<http://www.nickindia.com/games>
<http://kids.yahoo.com>
<http://kids.zapak.com>
<http://www.pitara.com>
<http://www.hindukids.org/>
<http://thekidzpage.com>
<http://kidsfront.com>
<http://playkidsgames.com>
<http://kidsone.in>
<http://www.123peppy.com>
<http://primarygames.com>
<http://www.kidzworld.com/>
<http://gamekidgame.com/>
<http://www.kidswebindia.com>

Mexico

<http://home.disneylatino.com/>
<http://www.cartoonnetwork.com.mx>
<http://www.juegos.com/>
<http://www.gusanito.com>
<http://www.papalote.mx/>
<http://www.elkiosco.gob.mx>
<http://www.kokone.com.mx>
<http://www.mundonick.com>
<http://www.kokone.org>
<http://www.pipoclub.com/>
<http://www.dinosaurio.com/>

Republic of South Africa

<http://kids.nationalgeographic.com/kids/>
<http://www.moshimonsters.com>
<http://www.miniclip.com/games/en>
<http://www.nick.com/>
<http://www.sterkinekor.com/site.php>
<http://www.gsn.com/>
<http://www.neopets.com>
<http://www.cartoonnetwork.com/>
<http://spongebob.nick.com>

Russia

www.deti.mail.ru
www.children.kulichki.net
www.solnet.ee
www.detstvo.ru
www.littlefox.ru
www.tvoyrebenok.ru
www.raskraska.com
www.lukoshko.net
www.babylessons.ru
www.mashamedved.tv
www.detskiy-mir.net
www.lizmult.ru
www.prozagadki.ru
www.detiseti.ru
www.danilka.com
www.agakids.ru
www.detsad-kitty.ru
www.olesya--emelyanova.narod.ru
www.rebenok.com
www.pochemu4ka.ru