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2011 Compliance Monitoring Report For the International Food & Beverage Alliance

On Global Advertising on Television, Print and Internet

March 2012

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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 global presence who share a common goal of helping consumers in all nations achieve balanced diets and active, 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 2011, 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 in child-directed media where 50% or more of the audience is under 12 years.

At the end of 2011, IFBA enhanced its global policy on marketing and advertising to children. Advertising to children under 12 years of age is now defined as advertising on media where 35% or more of the audience is under the age of 12. IFBA member companies have begun the transition to the new policy and will strive to be fully compliant worldwide by the end of 2012. Third-party monitoring exercises, similar to this one, will measure against this new enhanced policy beginning in 2013.

In 2009 and 2010 we conducted similar monitoring exercises. This report presents both the 2011 results and a comparison of the results with 2009 and 2010.

For more information, please contact: James Boulton at James.Boulton@accenture.com

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

Overall Methodology

We independently monitored ten markets for television advertising, seven markets for print advertising and seven markets for internet advertising. We conducted the monitoring exercise as a random sample of the companies' advertisements.

All the media research data analyzed in order to produce this report was gained from sources independent of IFBA companies 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 over a three-month period in 2011;
- Reviewed those spots for products not meeting nutritional criteria for advertising to children against product lists supplied by IFBA members;
- Included all spots 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; and counted these spots as non-compliant with the IFBA policy.

For print advertising, we identified 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 covered for the first time in this report, since the IFBA commitment became applicable to the company in August 2010, after the 2009 and 2010 monitoring periods. In the case of Ferrero, only Australia, Brazil and Mexico were monitored in 2011 as the IFBA commitments did not become fully applicable to Ferrero in other markets until 1 January 2012. For PepsiCo, the monitoring covered for the first time both beverages and snack foods, as the commitment became applicable to PepsiCo' snacks portfolio in January 2011. For Mars, the 2011 monitoring excluded Wrigley products as the commitment did not apply to them until 1 January 2012. For Kraft Foods, the 2011 monitoring excluded Cadbury products as the commitment did not apply to them until 1 January 2012. Spot means each individual advertising activity, i.e. the airtime used by the advertiser.

⁴ In India and Thailand the age threshold in the data analysed by Accenture was under 14 years of age instead of 12 years. This is because that is the demographic segment used by data providers and available to media agencies in those countries.

Summary of Key Results

A. 2011 Compliance Rates

Television: overall compliance rate is 97.6%

This result is based on the review of more than one million food and non-alcoholic beverage advertising spots (1,194,101) promoting products by IFBA members broadcast in Australia, Brazil, China (Guangzhou region), India, Mexico, New Zealand, Russia, South Africa, Thailand and Ukraine 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%.

28,812 instances of non-compliance were identified. Of these, almost all (28,737) were spots aired at night time (21:00-05:00) or spots with less than 1 Gross Rating Point (GRP)⁵. Statistical anomalies may occur when looking at spots with such a low sample. For such spots, any slight changes in the audience can lead to large swings in the percentage of demographic audience split. Though the profile can show a majority child audience share these programs tend not to be directed at children. Nonetheless, these spots were considered to be non-compliant.

Print: overall compliance rate is 100%

Over 40 publications were identified in the seven markets monitored (Australia, Brazil, China, India, New Zealand, Russia and South Africa) as targeting children under 12 years of age. We did not find any advertisements in any of these publications that promoted IFBA member companies' products.

Internet: overall compliance rate is 100%

Almost 100 websites targeted at children under 12 years of age were identified in the seven markets monitored (Australia, Brazil, China, India, New Zealand, Russia and South Africa). We did not find any non-compliant advertisements for IFBA member companies' products on any of these websites.

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given household).

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

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, we monitored four new markets - Chile, China (Beijing region instead of Shanghai), the Kingdom of Saudi Arabia and the Philippines - and we repeated compliance monitoring in four markets to obtain a comparison - India, Mexico, Russia and South Africa.

In 2011 we added three new markets - Australia, Brazil, China (Guangzhou region) – and we repeated compliance monitoring in several markets covered in 2009 and/or 2010 - India, Mexico, New Zealand, Russia, South Africa, Thailand and Ukraine.

Since 2009, the television advertising compliance rate has been above 93% for all markets. Overall variances among countries monitored are marginal. (See Fig. 2 on page 9). The overall television advertising compliance rate was 98.17% in 2009; 96% in 2010 and 97.6% in 2011. The print and internet advertising compliance rate was at 100% in all three years. (See results on pages 10 and 11).

Television Compliance Monitoring 2011

Methodology

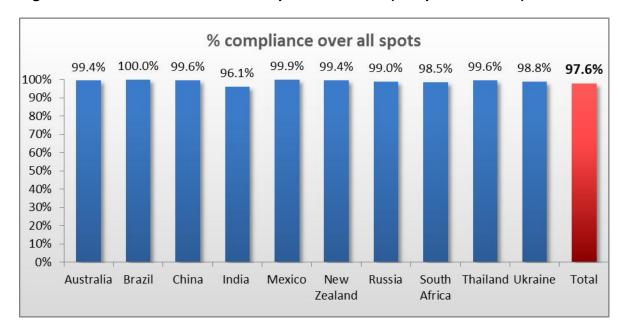
- For the purposes of this verification, ten sample markets were chosen: Australia, Brazil, China (Guangzhou region), India, Mexico, New Zealand, Russia, South Africa, Thailand and Ukraine. (See Appendix 1 for a list of television channels monitored)
- All spots by IFBA member companies aired in the ten markets from 1 April to 30 June 2011 were collected. Total sample size: 1,194,101 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.

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

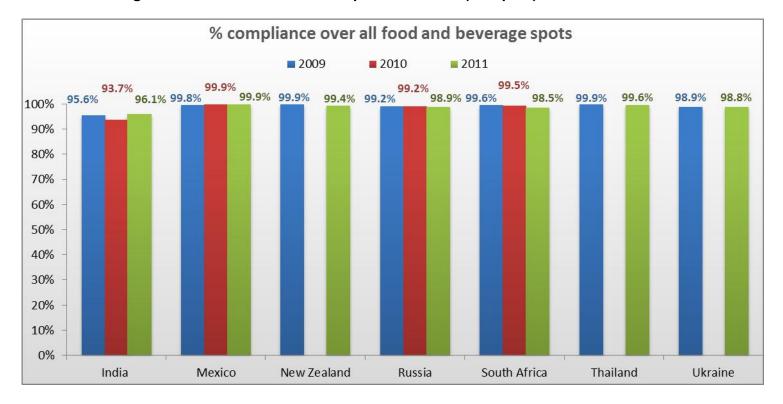
Results

Fig. 1: Television - Overall 2011 Compliance Results (All spots included)



Measuring Change: Trends in IFBA Member Companies' Television Advertising

Fig. 2: 2009 & 2010 vs. 2011 Compliance Results (All Spots)



Compliance rates between 2009 and 2011 are stable for all countries, displaying only marginal variations from year-to-year.

Print Compliance Monitoring

Methodology

- As age-specific readership data for children's print titles is not available, Accenture prepared a list of children's titles in each of the seven monitored markets - Australia, Brazil, China, India, New Zealand, Russia and South Africa - on the basis of national genre classifications used in the media industry. (See Appendix 2 for a list of the monitored print titles)
- Accenture purchased children's magazines available from local newsstands for a spot check. The findings across most markets were that children's magazines were mostly comics which did not have advertising in them.
- 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 noncompliant.

Results

Print Advertising: All markets were 100% Compliant: Australia, Brazil, China, India, New Zealand, Russia and South Africa.

Internet Compliance Monitoring

Methodology

- A list of children's websites in each of the seven markets monitored -Australia, Brazil, China, India, New Zealand, Russia and South Africa - was selected 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 during the second half of 2011 to check for advertising for IFBA member companies' products not meeting set nutritional criteria.
- Any advertisement for such products on any of these websites was deemed non-compliant.

Results

Internet Advertising: All markets were 100% Compliant: Australia, Brazil, China, India, New Zealand, Russia and South Africa.

Appendix 1: Television Channels Monitored

Australia (600+ channels) TVQ10 Brisbane

ONE Brisbane

Metro channels:ELEVEN BrisbaneABC1 SydneySBS ONE BrisbaneABC2 SydneySBS TWO Brisbane

ABC3 Sydney
ABC1 Adelaide
ABC News 24 Sydney
ABC2 Adelaide
ATN7 Sydney
ABC3 Adelaide

7TWO Sydney ABC News 24 Adelaide

7mate Sydney SAS7 Adelaide TCN9 Sydney 7TWO Adelaide GO! Sydney 7mate Adelaide Gem Sydney NWS9 Adelaide TEN10 Sydney GO! Adelaide **ONE Sydney** Gem Adelaide **ELEVEN Sydney** ADS10 Adelaide SBS ONE Sydney **ONE** Adelaide SBS TWO Sydney

ABC1 Melbourne

ABC2 Melbourne

ABC3 Melbourne

ABC3 Melbourne

ABC3 Melbourne

ABC4 Melbourne

ABC5 Melbourne

ABC6 Melbourne

ABC7 Perth

ABC News 24 Melbourne

ABC2 Perth

HSV7 Melbourne

ABC3 Perth

7TWO Melbourne ABC News 24 Perth

7mate Melbourne TVW7 Perth **GTV9** Melbourne 7TWO Perth GO! Melbourne 7mate Perth Gem Melbourne STW9 Perth ATV10 Melbourne GO! Perth **ONE Melbourne** Gem Perth **ELEVEN Melbourne** NEW10 Perth SBS ONE Melbourne **ONE Perth** SBS TWO Melbourne **ELEVEN Perth ABC1** Brisbane SBS ONE Perth ABC2 Brisbane SBS TWO Perth ABC3 Brisbane WIN Spill-in Sydney

ABC News 24 Brisbane

BTQ7 Brisbane

7TWO NEN Spill-in Sydney
7TWO Brisbane

7mate NEN Spill-in Sydney
7mate Brisbane

7TWO CBN Spill-in Sydney
7mate CBN Spill-in Sydney

GO! Brisbane

NBN Spill-in Sydney

Gem Brisbane

GO! NBN Spill-in Sydney

GO! WIN Spill-in Sydney

Gem NBN Spill-in Sydney

WAW Prime Spill-in Perth

WEW Prime Spill-in Perth

VEW Prime Spill-in Perth

CBN Prime Spill-in Sydney

GTW Prime Spill-in Perth

CTC SthnX Spill-in Sydney

WOW WIN Spill-in Perth

ONE CTC Spill-in Sydney

ELEVEN CTC Spill-in Sydney

NRN SthnX Spill-in Sydney

ONE NRN Spill-in Sydney

Sydney 111 HITS

ONE NRN Spill-in Sydney

Sydney 13TH STREET

GLV SthnX Spill-in Melbourne

Sydney Animal Planet

GO! VTV Spill-in Melbourne

Gem VTV Spill-in Melbourne

Sydney ARENA

Sydney ARENA+2

AMV Prime Spill-in Melbourne Sydney Aurora Community Channel

PTV Prime Spill-in Melbourne Sydney RBC Knowledge

PTV Prime Spill-in Melbourne Sydney BBC Knowledge
7TWO AMV Spill-in Melbourne Sydney BBC WORLD NEWS

7mate AMV Spill-in Melbourne Sydney Bio.

VTV WIN Spill-in Melbourne Sydney Boomerang
STV WIN Spill-in Melbourne Sydney Cartoon Network

SES WIN Spill-in Melbourne

ONE GLV Spill-in Melbourne

Sydney CBeebies

Sydney Channel [V]

ELEVEN GLV Spill-in Melbourne

Sydney CNBC

LEVEN GEV Spill-ill Meibourle Sydney CNDC

STQ Spill-in Brisbane
Sydney COMEDY CHANNEL
7TWO STQ Spill-in Brisbane
Sydney COMEDY CHANNEL+2
7mate STQ Spill-in Brisbane
Sydney Crime & Investigation
TNQ SthnX Spill-in Brisbane
Sydney Discovery Channel
Sydney Discovery Channel+2
ELEVEN TNQ Spill-in Brisbane
Sydney Discovery Home & Health

NRN Spill-in Brisbane

ONE NRN Spill-in Brisbane

Sydney Discovery Science

Sydney Discovery Turbo MAX

ELEVEN NRN Spill-in Brisbane

Sydney Discovery Turbo MAX+2

NEN Prime Spill-in Brisbane

7TWO NEN Spill-in Brisbane

Sydney Disney Channel

Sydney Disney Junior

RTQ WIN Spill-in Brisbane Sydney E!

7mate NEN Spill-in Brisbane Sydney ESPN
GO! RTQ Spill-in Brisbane Sydney ESPN2

Gem RTQ Spill-in Brisbane Sydney FMC - Family Movie Channe

GO! NBN Spill-in Brisbane

Gem NBN Spill-in Brisbane

Sydney FOX Classics

Sydney FOX Classics+2

NBN Spill-in Brisbane

Sydney FOX Footy

QQQ Spill-in Adelaide

Sydney FOX SPORTS 1

RTS WIN Spill-in Adelaide

Sydney FOX SPORTS 2

SES WIN Spill-in Adelaide

Sydney FOX SPORTS 3

GTS Spill-in Adelaide

Sydney FOX SPORTS News

IMP Spill-in Adelaide Sydney FOX8

Sydney FOX8+2 Sydney The Style Network
Sydney FUEL TV Sydney The Weather Channel

Sydney TLC Sydney History Channel Sydney HOW TO Channel Sydney TLC+2 Sydney KidsCo Sydney TV1 Sydney TV1+2 Sydney LifeStyle Channel Sydney LifeStyle Channel+2 Sydney TVN Sydney LifeStyle FOOD Sydney UKTV Sydney LifeStyle FOOD+2 Sydney UKTV+2 Sydney LifeStyle HOME Sydney UNIVERSAL Sydney LifeStyle YOU Sydney [V] HITS

Sydney LifeStyle YOU+2 Sydney W Sydney MAX Sydney W2

Sydney MOVIE EXTRA Sydney WORLD MOVIES Channel Sydney MOVIE GREATS Sydney Other Subscription TV

Sydney MOVIE ONE Melbourne 111 HITS
Sydney MOVIE TWO Melbourne 111 HITS2
Sydney MTV Melbourne 13TH STREET
Sydney MTV Classic Melbourne 13TH STREET+2
Sydney MTV Hits Melbourne Animal Planet

Sydney Nat Geo Adventure Melbourne ARENA
Sydney Nat Geo Adventure+2 Melbourne ARENA+2

Sydney Nat Geo Wild Melbourne Aurora Community Chann

Sydney National Geographic Melbourne BBC Knowledge
Sydney National Geographic+2 Melbourne BBC WORLD NEWS

Sydney Nick Jr. Melbourne Bio.

Sydney Nickelodeon Melbourne Boomerang
Sydney Ovation Melbourne Cartoon Network

Sydney SCI FI Melbourne CBeebies
Sydney SCI FI+2 Melbourne Channel [V]
Sydney showcase Melbourne CNBC

Melbourne COMEDY CHANNEL Sydney showcase+2 Sydney showtime action Melbourne COMEDY CHANNEL+2 Melbourne Crime & Investigation Sydney showtime comedy Sydney showtime drama Melbourne Discovery Channel Sydney showtime Greats Melbourne Discovery Channel+2 Melbourne Discovery Home & Healt Sydney showtime premiere Sydney showtime premiere 2 Melbourne Discovery Science Sydney SKY NEWS Melbourne Discovery Turbo MAX

Melbourne Discovery Turbo MAX+2

Sydney Sky Racing Melbourne Disney Channel
Sydney Sky Racing World Melbourne Disney Junior

Sydney SPEED Melbourne E!
Sydney STARPICS 1 Melbourne ESPN
Sydney STARPICS 2 Melbourne ESPN2

Sydney STVDIO Melbourne FMC - Family Movie Cha

Sydney SKY NEWS BUSINESS

Melbourne FOX Classics Melbourne SKY NEWS

Melbourne FOX Classics+2 Melbourne SKY NEWS BUSINESS

Melbourne FOX Footy

Melbourne Sky Racing

Melbourne FOX SPORTS 1 Melbourne Sky Racing World

Melbourne FOX SPORTS 2
Melbourne FOX SPORTS 3
Melbourne STARPICS 1
Melbourne FOX SPORTS News
Melbourne STARPICS 2
Melbourne FOX8
Melbourne STVDIO

Melbourne FOX8+2 Melbourne The Style Network

Melbourne FUEL TV Melbourne The Weather Channel

Melbourne History Channel Melbourne TLC Melbourne HOW TO Channel Melbourne TLC+2 Melbourne KidsCo Melbourne TV1 Melbourne LifeStyle Channel Melbourne TV1+2 Melbourne LifeStyle Channel+2 Melbourne TVN Melbourne LifeStyle FOOD Melbourne UKTV Melbourne LifeStyle FOOD+2 Melbourne UKTV+2 Melbourne LifeStyle HOME Melbourne UNIVERSAL Melbourne LifeStyle YOU Melbourne [V] HITS

Melbourne LifeStyle YOU+2 Melbourne W
Melbourne MAX Melbourne W2

Melbourne MOVIE EXTRA Melbourne WORLD MOVIES Channel
Melbourne MOVIE GREATS Melbourne Other Subscription TV

Melbourne MOVIE ONE

Melbourne MOVIE TWO

Melbourne MTV

Melbourne MTV

Melbourne MTV Classic

Melbourne MTV Hits

Brisbane 111 HITS2

Brisbane 13TH STREET

Brisbane 13TH STREET+2

Brisbane Animal Planet

Melbourne Nat Geo Adventure Brisbane ARENA
Melbourne Nat Geo Adventure+2 Brisbane ARENA+2

Melbourne Nat Geo Wild Brisbane Aurora Community Channe

Melbourne National Geographic

Melbourne National Geographic+2

Brisbane BBC Knowledge

Brisbane BBC WORLD NEWS

Melbourne Nick Jr. Brisbane Bio.

Melbourne Nickelodeon Brisbane Boomerang
Melbourne Ovation Brisbane Cartoon Network

Melbourne SCI FI Brisbane CBeebies
Melbourne SCI FI+2 Brisbane Channel [V]
Melbourne showcase Brisbane CNBC

Melbourne showcase+2

Melbourne showtime action

Melbourne showtime comedy

Melbourne showtime drama

Melbourne showtime Greats

Melbourne showtime premiere

Brisbane COMEDY CHANNEL+2

Brisbane Crime & Investigation

Brisbane Discovery Channel

Brisbane Discovery Channel+2

Brisbane Discovery Home & Health

Melbourne showtime premiere 2 Brisbane Discovery Science

Brisbane Discovery Turbo MAX Brisbane showcase Brisbane Discovery Turbo MAX+2 Brisbane showcase+2 Brisbane Disney Channel Brisbane showtime action Brisbane Disney Junior Brisbane showtime comedy Brisbane E! Brisbane showtime drama Brisbane ESPN Brisbane showtime Greats Brisbane ESPN2 Brisbane showtime premiere Brisbane FMC - Family Movie Channel Brisbane showtime premiere 2

Brisbane FOX Classics Brisbane SKY NEWS

Brisbane FOX Classics+2 Brisbane SKY NEWS BUSINESS

Brisbane FOX Footy Brisbane Sky Racing

Brisbane FOX SPORTS 1 Brisbane Sky Racing World

Brisbane FOX SPORTS 2
Brisbane FOX SPORTS 3
Brisbane STARPICS 1
Brisbane FOX SPORTS News
Brisbane STARPICS 2
Brisbane FOX8
Brisbane STVDIO

Brisbane FOX8+2 Brisbane The Style Network
Brisbane FUEL TV Brisbane The Weather Channel

Brisbane TLC **Brisbane History Channel** Brisbane HOW TO Channel Brisbane TLC+2 Brisbane TV1 Brisbane KidsCo Brisbane LifeStyle Channel Brisbane TV1+2 Brisbane LifeStyle Channel+2 Brisbane TVN Brisbane UKTV Brisbane LifeStyle FOOD Brisbane UKTV+2 Brisbane LifeStyle FOOD+2 Brisbane UNIVERSAL Brisbane LifeStyle HOME Brisbane LifeStyle YOU Brisbane [V] HITS

Brisbane LifeStyle YOU+2 Brisbane W
Brisbane MAX Brisbane W2

Brisbane MOVIE EXTRA Brisbane WORLD MOVIES Channel
Brisbane MOVIE GREATS Brisbane Other Subscription TV

Brisbane MOVIE ONE

Brisbane MOVIE TWO

Adelaide 111 HITS

Adelaide 111 HITS2

Brisbane MTV

Adelaide 13TH STREET

Brisbane MTV Classic

Adelaide 13TH STREET+2

Adelaide Animal Planet

Brisbane Nat Geo Adventure Adelaide ARENA
Brisbane Nat Geo Adventure+2 Adelaide ARENA+2

Brisbane Nat Geo Wild Adelaide Aurora Community Channel

Brisbane National Geographic Adelaide BBC Knowledge
Brisbane National Geographic+2 Adelaide BBC WORLD NEWS

Brisbane Nick Jr. Adelaide Bio.

Brisbane Nickelodeon Adelaide Boomerang
Brisbane Ovation Adelaide Cartoon Network

Brisbane SCI FI Adelaide CBeebies
Brisbane SCI FI+2 Adelaide Channel [V]

Adelaide CNBC Adelaide Nat Geo Wild

Adelaide COMEDY CHANNEL Adelaide National Geographic

Adelaide COMEDY CHANNEL+2 Adelaide National Geographic+2

Adelaide Crime & Investigation Adelaide Nick Jr. Adelaide Discovery Channel Adelaide Nickelodeon Adelaide Ovation Adelaide Discovery Channel+2 Adelaide Discovery Home & Health Adelaide SCI FI Adelaide Discovery Science Adelaide SCI FI+2 Adelaide Discovery Turbo MAX Adelaide showcase Adelaide Discovery Turbo MAX+2 Adelaide showcase+2 Adelaide Disney Channel Adelaide showtime action Adelaide Disney Junior Adelaide showtime comedy Adelaide E! Adelaide showtime drama

Adelaide FMC - Family Movie Channel Adelaide showtime premiere 2

Adelaide showtime Greats

Adelaide showtime premiere

Adelaide FOX Classics Adelaide SKY NEWS

Adelaide ESPN

Adelaide ESPN2

Adelaide FOX Classics+2 Adelaide SKY NEWS BUSINESS

Adelaide FOX Footy Adelaide Sky Racing

Adelaide FOX SPORTS 1 Adelaide Sky Racing World

Adelaide FOX SPORTS 2

Adelaide SPEED

Adelaide FOX SPORTS 3

Adelaide STARPICS 1

Adelaide FOX SPORTS News

Adelaide STARPICS 2

Adelaide FOX8

Adelaide FOX8+2 Adelaide The Style Network
Adelaide FUEL TV Adelaide The Weather Channel

Adelaide History Channel

Adelaide TLC

Adelaide HOW TO Channel

Adelaide TLC+2

Adelaide KidsCo

Adelaide TV1

Adelaide LifeStyle Channel

Adelaide TV1+2

Adelaide LifeStyle Channel+2

Adelaide TVN

Adelaide LifeStyle FOOD

Adelaide UKTV

Adelaide LifeStyle FOOD+2

Adelaide UKTV+2

Adelaide LifeStyle HOME

Adelaide UNIVERSAL

Adelaide LifeStyle YOU

Adelaide [V] HITS

Adelaide LifeStyle YOU+2 Adelaide W
Adelaide MAX Adelaide W2

Adelaide MOVIE EXTRA Adelaide WORLD MOVIES Channel
Adelaide MOVIE GREATS Adelaide Other Subscription TV

Adelaide MOVIE ONE Perth 111 HITS

Adelaide MOVIE TWO Perth 111 HITS2

Adelaide MTV Perth 13TH STREET

Adelaide MTV Classic Perth 13TH STREET+2

Adelaide MTV Hits Perth Animal Planet

Adelaide Nat Geo Adventure Perth ARENA
Adelaide Nat Geo Adventure+2 Perth ARENA+2

Perth Aurora Community Channel Perth MOVIE GREATS
Perth BBC Knowledge Perth MOVIE ONE
Perth BBC WORLD NEWS Perth MOVIE TWO

Perth Bio. Perth MTV

Perth Boomerang Perth MTV Classic
Perth Cartoon Network Perth MTV Hits

Perth CBeebies Perth Nat Geo Adventure
Perth Channel [V] Perth Nat Geo Adventure+2

Perth CNBC Perth Nat Geo Wild

Perth COMEDY CHANNEL Perth National Geographic
Perth COMEDY CHANNEL+2 Perth National Geographic+2

Perth Nick Jr. Perth Crime & Investigation Perth Discovery Channel Perth Nickelodeon Perth Discovery Channel+2 Perth Ovation Perth SCI FI Perth Discovery Home & Health Perth Discovery Science Perth SCI FI+2 Perth Discovery Turbo MAX Perth showcase Perth Discovery Turbo MAX+2 Perth showcase+2 Perth Disney Channel Perth showtime action Perth Disney Junior Perth showtime comedy Perth E! Perth showtime drama Perth ESPN Perth showtime Greats Perth ESPN2 Perth showtime premiere Perth FMC - Family Movie Channel Perth showtime premiere 2

Perth FOX Classics Perth SKY NEWS

Perth FOX Classics+2 Perth SKY NEWS BUSINESS

Perth FOX Footy Perth Sky Racing

Perth FOX SPORTS 1 Perth Sky Racing World

Perth FOX SPORTS 2
Perth FOX SPORTS 3
Perth FOX SPORTS News
Perth FOX SPORTS News
Perth STARPICS 2
Perth FOX8
Perth STVDIO

Perth FOX8+2 Perth The Style Network
Perth FUEL TV Perth The Weather Channel

Perth History Channel Perth TLC Perth HOW TO Channel Perth TLC+2 Perth KidsCo Perth TV1 Perth LifeStyle Channel Perth TV1+2 Perth LifeStyle Channel+2 Perth TVN Perth UKTV Perth LifeStyle FOOD Perth LifeStyle FOOD+2 Perth UKTV+2 Perth LifeStyle HOME Perth UNIVERSAL Perth [V] HITS Perth LifeStyle YOU

Perth LifeStyle YOU+2 Perth W
Perth MAX Perth W2

Perth MOVIE EXTRA Perth WORLD MOVIES Channel

Universal Channel

Brazil (45 channels)

Viva VH1 Warner

Open TV:

Bandeirantes

CNT

Gazeta

Globo

MTV Record Rede TV! SBT

TV Cultura

Cable TV:

A&E

AXN

Canal Brasil Cartoon Network **Discovery Channel**

Discovery Home e Health

Discovery Kids

Disney Channel

E!

ESPN Brasil FX

Fox

Globo News

GNT HBO HBO₂ Max HD Megapix

Multishow

National Geographic

Nickelodeon

Sony Sportv

Sportv 2

Telecine Action Telecine Cult Telecine Fun

Telecine Touch Telecine Pipoca Telecine Premium

The History Channel TNT

China (26 channels)

Guangdong Satellite

Guangdong TV Zhujiang Channel Guangdong TV Sports Channel Guangdong TV Public Channel

TVS Economy Channel

TVS-2

TVS Entertainment Channel TVS Movie & Drama Channel

TVS Children Channel

Jade Channel(Chinese, Guangdong Cable) ATV Chinese Channel(Guangdong Cable) Phoenix Chinese Channel (Guangdong Cable) China Entertainment TV(Guangdong Cable)

Xing Kong Wei Shi

Guangzhou TV General Channel Guangzhou TV Competition Channel Guangzhou TV Movies Channel Guangzhou TV News Channel Guangzhou TV Finance Channel

Jade Channel (Chinese, Guangzhou Cable) ATV Chinese Channel(Guangzhou Cable) Pearl Channel (English, Guangzhou Cable) ATV English Channel (Guangzhou Cable) Phoenix Chinese Channel (Guangzhou Cable) China Entertainment TV(Guangzhou Cable)

Xing Kong Wei Shi

India (314 channels)

DD PUNJABI **DD1 NATIONAL**

DD16 BHOJPURI (UP)

DD5 TAMIL **DD8 TELUGU DELHI CHANNEL-I**

UDAYA TV ZEE TV STAR PLUS SUN TV **SURYA**

SONY ENTERTAINMENT ASIANET NEWS ZEE NEWS STAR GOLD

MTV KTV

BBC WORLD NEWS SAHARA ONE
CARTOON NETWORK TEN SPORTS
CHANNEL [V] AASTHA

STAR MOVIES DD14 RAJASTHAN

STAR SPORTS PATNA

ANIMAL PLANET ZEE CINEMA **GEMINI TV** DD6 ORIYA E TV GUJARATI **ASIANET RAJ TV B4U MOVIES ESPN ETC PUNJABI VIJAY TV** SAHARA SAMAY EENADU TV (ETV TELUGU) SAHARA UP **ZING** E TV ORIYA

ZIIVO ETV ORITA

DD9 KANNADA HEADLINES TODAY

DD11 GUJARATI NDTV 24X7 DD7 BENGALI NDTV INDIA

DISCOVERY RAJ DIGITAL PLUS
AXN GEMINI MOVIES
DD MP UDAYA MOVIES
DD10 MARATHI DD GUWAHATI

ETC MAA TV

JAYA TV AAKASH BANGLA

MAX DD NEWS
STAR NEWS SAHARA MP
STAR WORLD SAHARA MUMBAI

CNN POGO

CNBC TV 18 STAR UTSAV

NGC FOX HISTORY & ENTERTAINMENT

ZEE BANGLA SS MUSIC
ZEE MARATHI INDIA TV
ZEE PUNJABI ZOOM

E TV MARATHI HUNGAMA TV

HBO MH1

B4U MUSIC NICKELDEON
E TV KANNADA DISNEY
AAJ TAK DISNEY XD

DD SPORTS TV9

DD4 MALAYALAM NDTV PROFIT

KAIRALI TLC

E TV BANGLA CNBC AWAAZ

SAB TV IBN7 ZEE CAFÉ ETV 2

ZEE STUDIO ZEE TELUGU

TARA MUZIK STAR CRICKET STAR ANANDA MH1 SHRADDHA MH1 NEWS SAHARA NCR **ASIANET PLUS** LIVE INDIA ZEE SMILE **BINDASS**

NDTV GOOD TIMES TEZ SAHARA BIHAR KALAIGNAR TV **ZEE BUSINESS** KASTHURI ZEE TALKIES **SUN MUSIC**

SUN NEWS 9X M **CNN IBN MEGATV** TIMES NOW WE KIRAN TV NEWS 24 **FILMY** IMAGINE

UDAYA NEWS WORLD MOVIES **GEMINI MUSIC ISAIYARUVI GEMINI NEWS UTV MOVIES KOLKATA TV** MANORANJAN TV

ZEE KANNADA N TV

DILLI AAJ TAK JAIHIND TV **AMRITA TV** SONY AATH

PIX VISSA

E TV URDU **RAJ MUSIX** MANORAMA NEWS **IBN LOKMAT HOME SHOP 18** VH1 E TV BIHAR **NEO CRICKET**

E TV MP NEWSX

E TV UP **BLOOMBERG UTV** E TV RAJASTHAN MAA MUSIC

ZEE ACTION E24

ZEE CLASSIC SANGEET BHOJPURI

INDIAVISION COLORS ZEE PREMIER MAHUAA TV O TV TV 9 GUJARAT

NEO SPORTS SUVARNA NEWS 24*7

STAR PRAVAH

UDAYA MUSIC SAAM MARATHI PTC NEWS STAR JALSHA 24 GHANTA TV 5 TELUGU ZEE 24 TAAS PTC PUNJABI

MI MARATHI **TARANG**

TV9 KANNADA SITARA

MUSIC INDIA **LUMIERE MOVIES**

SANGEET BANGLA ZEE TAMIL ASIANET SUVARNA **CNEB** STAR MAJHA **VANITHA**

CHUTTI TV

SEITHIGAL MAHUAA BANGLA

SIRIPPOLI SADHNA NEWS (BIHAR/JHARKHAND)

TV9 MUMBAI TEN CRICKET WB TARA NEWZ

PTC CHAKDE MAHUAA KHOBOR

ZEE 24 GANTALU ACV
ADITHYA TV JUKEBOX
JAYA MAX ROSEBOWL
ZEE 24 GHANTE CHHATTISGARH RANG

TARANG MUSIC SARTHAK TV

ZEE NEWS UTTAR PRADESH TEN ACTION PLUS

NEWS 9 LAKSHYA ENTERTAINMENT

NDTV HINDU PEOPLE
SAKSHI TV I NEWS
P7 NEWS FOX CRIME

ET NOW FX

KUSHI TV ABN ANDHRA JYOTHY

GEMINI COMEDY

CHINTU TV

MEGA MUSIQ

UDAYA COMEDY

MAHUAA NEWS

MOVIES NOW

HM TV

STAR CJ ALIVE

VASANTH TV ZEE KHANA KHAZANA

RUPASHI BANGLA INDIA NEWS

MAKKAL TV INDIA NEWS BIHAR AND

DY 365 JHARKHAND

INDIA NEWS HARYANA

KANAK TV

NEWS LIVE

FOODFOOD

POLIMER

BBC ENTERTAINMENT

SRI SANKARA

UTV ACTION

MAA JUNIOR

STUDIO N

ZEE SALAAM

RAJ NEWS 24*7 - TAMIL

RAJ NEWS - TELUGU

NEWS TIME ASSAM

DHOOM MUSIC

TRAVEL XP

DHAMAAL

PRARTHANA
PRAGYA TV
NEWS TIME
CAPTAIN TV
BIG CBS LOVE

CHITHIRAM

SAMAYA 24*7

DISCOVERY SCIENCE

DISCOVERY TURBO

DISCOVERY TURBO

BIG CBS SPARK

MASTIII MBC TV

INDIA TALKIES

MAHAA NEWS RAJ MUSIC KARNATAKA

New Zealand (61 channels) **JEEVAN TV** PRIME NEWS TVOne, TVONE **UTV ACTION TELUGU** TV2, TV2 SANANDA TV TV3, TV3 INDIA NEWS RAJASTHAN C4 (pre 6 Feb 2011), C4(pre6Feb11) **KASHISH NEWS** PRIME, PRIME DISCOVERY CHANNEL TAMIL SKY Movies 1, MOVIES1 **GET PUNJABI** SKY Sport 1, SPORT1 MUSIC XPRESS the BOX, BOX **VISION MUSIC** Discovery and Trackside Analogue, DIS-UHF **UTV STARS** Juice TV, JUICE HIT 7 Maori TV, MTSN **PUTHIYATHALAIMURAI** TV4.TV4 9X TASHAN FOUR, FOUR MIX TVOne Northern, TV1-NORTH M TUNES HD TVOne Central, TV1-CENT **REPORTER** TVOne South, TV1-SOUTH **HISTORY TV18** TVOne Auckland, TV1-AKLD **KOCHU TV** TVOne Waikato, TV1-WAIK 9X JHAKAAS TVOne Palmerston North, TV1-PALM MAZHAVIL MANORAMA TVOne Wellington, TV1-WGTN **NEWS EXPRESS** TVOne Christchurch, TV1-CHCH **SATHIYAM** TVOne Dunedin, TV1-DUN KASTHURI NEWZ24 TVOne Central (Post Jul 09), TV1CENTRAL **CARE WORLD** TVOne Southern, TV1-STH LIFE OK TVOne Southern (Post Jul 09), SONIC NICKELODEON TV1SOUTHERN **R PLUS** TVOne Digital, TV1-SAT TV2 Auckland, TV2-AKLD Mexico (12 channels) TV2 Waikato, TV2-WAIK TV2 Palmerston North, TV2-PALM **National Channels:** TV2 Wellington, TV2-WGTN TV2 Christchurch, TV2-CHCH 5 TV2 Dunedin, TV2-DUN TV2 Southern, TV2-STH 9 GALAVISION TV2 Digital, TV2-SAT 13 TV3 Northern, TV3-NORTH **Regional Channels:** TV3 Waikato, TV3-WAIK TV3 Central, TV3-CENT **FORO TV** TV3 Southern, TV3-SOUTH 11 TV3 Christchurch, TV3-CHCH 22 TV3 Dunedin, TV3-DUN **CADENA TRES** TV3 Digital, TV3-SAT 34 MTV, MTV 40

TV3 Plus 1, TV3PLUS1

PRIME Auckland, PRIME-AKLD

PRIME Waikato , PRIME-WAIK MTV Base
PRIME Wellington , PRIME-WGTN SABC 3
PRIME Christchurch , PRIME-CHCH E-TV
PRIME Dunedin , PRIME-DUN Boomerang
PRIME Digital . PRIME-SAT DSTV Other

PRIME Digital , PRIME-SAT DSTV Other
Animal Planet , ANIMAL CSN

Cartoon Network , CARTOON E! Entertainment
Discovery Channel , DISCOVERY M-Net Holiday
63 Our Music TV , 63 M-Net Series

SKY Movies 2 (Pre30Jun07), MOVIES2 BBC Prime National Geographic, NATGEO kykNET

Nickelodeon , NICK M-Net Movies 1

SKY Sport 2, SPORT2 Universal Channel (Hallmark)

SKY Movies Great , MOVIESG TCM

SuperSport 1/2/3/5/6

ESPN

Go

SKY Sport 3 , SKYS3 M-Net Movies 2 MM2
TVNZ Heartland , TVNZHEART SuperSport Update

SKY Movies 2, SKY SZONE

Russia (20 channels)

Euronews BBC World
MTV CNN News
Muz TV Sky News
Domashnyi CNBC Africa
Zvezda SUMMIT

Disney channel
NTV

Discovery Channel
Travel Channel

Pervyi
Peretz
F Channel

K All Day

5 Channel

Ren-TV

Cartoon Network

VH1

Rossia 1 VH1
Rossia 2 MTV
Rossia 24 Channel O
Rossia K

Semerka BB24
STS M-Net Action
TV Centr Zone Reality
TV 3 SuperSport 7
TNT IDOLS

South Africa (82 channels)

BBC Food

SABC 2 Animal Planet
Africa Magic History Channel
MK89 Disney Channel

SABC 1 Crime & Investigation

M-Net Al Jazeera

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Home Channel ICTV
Sony Entertainment M1

Animax NEW CHANNEL

M-Net Stars STB

Style Network RTR PLANET
One Gospel MEGA
Soweto TV RU MUSIC
Magic World 24 CHANNEL
SuperSport 4 FIRST BUSINESS

M-Net Extra
NEWS ONE
Nat Geo wild
MENU-TV
ESPN Classic
MAXXI-TV
Africa Magic Plus
STAR TV
e-News Channel
M2
Nickelodian
CITI

BBC Entertainment MUSIC BOX UA

BBC Lifestyle TBi
BBC Knowledge 1 AUTO
CBEEBIES QTV

Cape Town TV MTV Ukraine
Vuzu 5 CHANNEL
Discovery World NTV MIR

KidsCO CHANNEL 1 Rus

MZANSI O-TV

FOOD GUMOR TV

Sony Max TET
Disney XD FOOTBALL
Disney Junior TONIS

Top TV NTN
Saffron CHANNEL UKRAINE
DSTV Total REAL ESTATE

Thailand (5 channels)

K2

K1

CH3 2+2

CH5 DISCOVERY CHANNEL

CH7 UBR

CH9 MALYATKO TV

NBT

Ukraine (42 channels)

INTER 1+1

FIRST NATIONAL/ERA

ENTER ENTER FILM

Appendix 2: Print Titles Monitored

Australia (2 titles)

Dolly Girlfriend Vinni the Pooh and his friends Cars (Tachki) Winx club

Brazil (10 titles)

Almanaque da Mônica Heróis Marvel Disney Princesas

Recreio

Pateta faz História

Bakugan Pokémon Luluzinha Nintendo World Homem-Aranha

South Africa (9 titles)

Barbie Magazine - Disney Disney and Me - Disney Hannah Montana - Disney Princess - Disney Cars - Disney The Lion King - Disney Hoezit!

MiniMag National Geographic Kids

China (8 titles)

Mickey mouse
Children Fun—Barbie
Garden Baby
Cars
Moore Park
A Little Princess
Infoprogramme little magic fairy
Winnie the Pooh

India (4 titles)

Champak Chandamama Nandan GoKulam

New Zealand (1 title)

Kids zone

Russia (9 titles)

Barbie GEOlenok National Geographic (junior traveller) Spanch Bob Murzilka Neposeda

Appendix 3: Websites Monitored

Australia (8 websites)

http://dolly.ninemsn.com.au/

http://au.youth.yahoo.com/girlfriend/

http://kids.nationalgeographic.com

www.kids.net.au/

www.freekidstrivia.com/

www.nickelodeon.com.au/

www.splash.net.au/kids/animations.htm www.gamearena.com.au/shop/games

/browse.php/kids

Brazil (21 websites)

criancas.uol.com.br/

atrevidinha.uol.com.br/atrevidinha/

joguim.com

home.disney.com.br

cartoonnetwork.com.br

discoverykidsbrasil.com

mundonick.uol.com.br

turmadochaves.com/

criancas.terra.com.br/

tvglobinho.globo.com

sbt.com.br/clubinhosbt/

clubelilicaripilica.com.br

senninha.globo.com/

recreionline.abril.com.br

dolls.com.br

iguinho.com.br

maquinadequadrinhos.com.br

mingaudigital.com.br

neopets.com

br.pollypocket.com

qdivertido.com.br

China (20 websites)

www.61baobao.com

17roco.qq.com

www.51seer.com

www.tom61.com

down.dishini.com

www.chunmiao.cn

www.060s.com

www.aobi.com

www.beva.com

www.funshare.com.cn

www.hezi.com

www.chinakids.net.cn

www.tongnian.com

www.jinmiao.cn

www.hongniba.com.cn

www.mykaka.cn/

www.ccppg.com.cn

www.baidudu.cn

www.hongdaishu.com

www.sst.org.cn

India (19 websites)

www.cartoonnetworkindia.com

http://www.pogo.tv/

http://disney.in/index.jsp

www.hungamatv.com/

http://kids.discovery.com/

http://www.nickindia.com/

mtp.//www.mckindia.com/

http://kids.yahoo.com/

http://kids.zapak.com/

http://www.pitara.com/

http://www.hindukids.org/

www.thekidzpage.com

http://www.kidsfront.com/

www.playkidsgames.com

http://www.kidsone.com/

http://www.123peppy.com/

www.primarygames.com

http://www.kidzworld.com/

www.gamekidgame.com

www.kidswebindia.com

New Zealand (5 websites)

www.cartoonnetwork.co.nz/

www.nicknz.co.nz/

www.miniclip.co.nz

www.stardoll.co.nz

Google Display Network

(large selection of very small sites within the

Google display network)

Russia (13 websites)

http://www.webiki.ru/

www.webkinz.com/ru ru

www.bibigosha.ru

www.classnet.ru

http://tvidi.ru/

www.cartoon network.ru

www.ben10.ws/ru www.barbieland.ru http://gubkabob.net/ http://bratzlife.ru/ www.smeshariki.ru www.winxland.ru www.disney.ru

South Africa (10 websites)

kids.nationalgeographic.com/kids moshimonsters.com miniclip.com/games/en/ nick.com sterkinekor.com/site.php gsn.com neopets.com/ cartoonnetwork.com/ spongebob.nick.com/ disney.co.za