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2012 Compliance Monitoring Report  
For the International Food & Beverage Alliance

On Global Advertising on Television, Print and Internet

December 2012

• Consulting • Technology • Outsourcing

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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, Mars, Mondelēz International, 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 to achieve balanced diets and healthy, active 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.<sup>1</sup> 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.

Accenture Media Management was commissioned by IFBA 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.

This exercise was already conducted in 2009, 2010 and 2011. This report presents both the 2012 results and a comparison of the results since 2009.

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

## Overall Methodology

We independently monitored television advertising across seven markets: Malaysia, Russia, China (Shanghai region), Saudi Arabia, South Africa, Thailand and Colombia. Print and internet advertising was monitored in five markets: Brazil, China, Russia, Singapore and South Africa. We conducted the monitoring exercise as a random sample of the companies' advertisements.

All the media research data analysed 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 space had already been purchased by the companies.<sup>2</sup>

To monitor compliance with television advertising, we:

- Examined all advertising spots<sup>3</sup> for products marketed by IFBA members aired in the selected markets over a three-month period in 2012 (from 1 July – to 30 Sept);
- Reviewed those spots for products not meeting IFBA members' 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 age<sup>4</sup>; 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 them 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.

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<sup>2</sup> The commitment became globally applicable to Ferrero, Wrigley products (Mars) and Cadbury products (Kraft Foods) on 1 January 2012. All activities by all IFBA member companies were therefore covered in the 2012 monitoring exercise.

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

<sup>4</sup> In Saudi Arabia, Colombia and Malaysia the age threshold in the data analysed by Accenture was under 15 years of age instead of 12 years. In 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. 2012 Compliance Rates

#### **Television: overall compliance rate is 98.9%**

This result is based on the review of **448,144 advertising spots** for food and non-alcoholic beverage products by IFBA members broadcast in Malaysia, Russia, China (Shanghai region), Saudi Arabia, South Africa, Thailand and Colombia during the monitoring period (1 July - 30 Sept 2012). 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%.

4,769 instances of non-compliance were identified. Of these, almost all (4,743) were spots aired at night time (21:00-05:00) or spots with less than 1 Gross Rating Point (GRP)<sup>5</sup>. 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.

All instances of non-compliance were reported to the IFBA member concerned in order for corrective action to be taken, as appropriate.

#### **Print: overall compliance rate is 100%**

57 publications were identified in the five markets monitored (Brazil, China, Russia, Singapore and South Africa) as targeting children under 12 years of age. We did not find any non-compliant advertisements for IFBA member companies' products in any of these publications.

#### **Internet: overall compliance rate is 100%**

Almost 87 websites targeted at children under 12 years of age were identified in the five markets monitored (Brazil, China, Russia, Singapore 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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<sup>5</sup> 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 previous years' 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), 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.

In 2012, three new markets were added - Malaysia and Colombia for TV and Singapore for print and internet – and we repeated compliance monitoring in several markets covered in previous years - Russia, China (Shanghai region), Saudi Arabia, South Africa and Thailand for TV and Brazil, China, Russia and South Africa for print and internet advertising.

Since 2009, the television advertising compliance rate has been above 93% for all markets. Overall variances among countries monitored remain marginal. (*See Fig. 2 on page 9*). The overall television advertising compliance rate was 98.17% in 2009; 96% in 2010, 97.6% in 2011 and 98.9% in 2012. The print and internet advertising compliance rate was at 100% in all four years. (*See results on pages 10 and 11*).

## Television Compliance Monitoring 2012

### Methodology

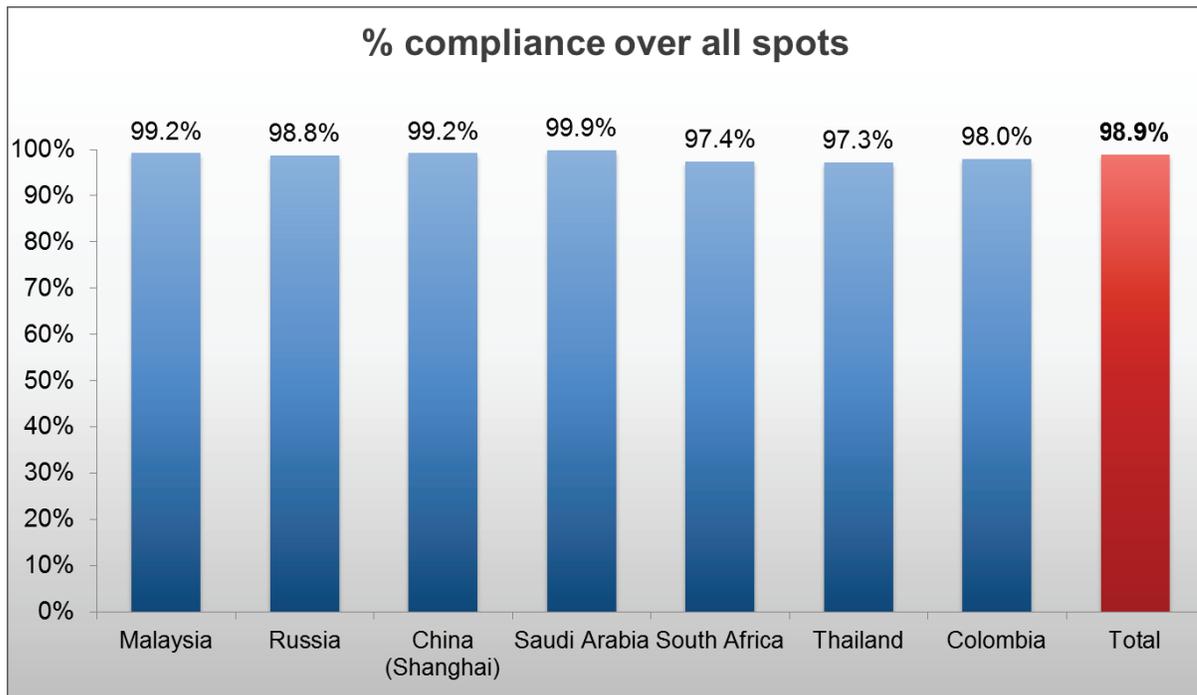
- For the purposes of this verification, seven sample markets were chosen: Malaysia, Russia, China (Shanghai region), Saudi Arabia, South Africa, Thailand and Colombia. (*See Appendix 1 for a list of television channels monitored*).
- All spots by IFBA member companies aired in the seven markets from 1 July to 30 Sept 2012 were collected. Total sample size: 448,144 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.<sup>6</sup>
- 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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<sup>6</sup> In Saudi Arabia, Colombia and Malaysia the age threshold in the data analysed by Accenture was under 15 years of age instead of 12 years. In Thailand the age threshold in the data analysed by Accenture was under 14 years of age instead of 12 years. (*See footnote 4*)

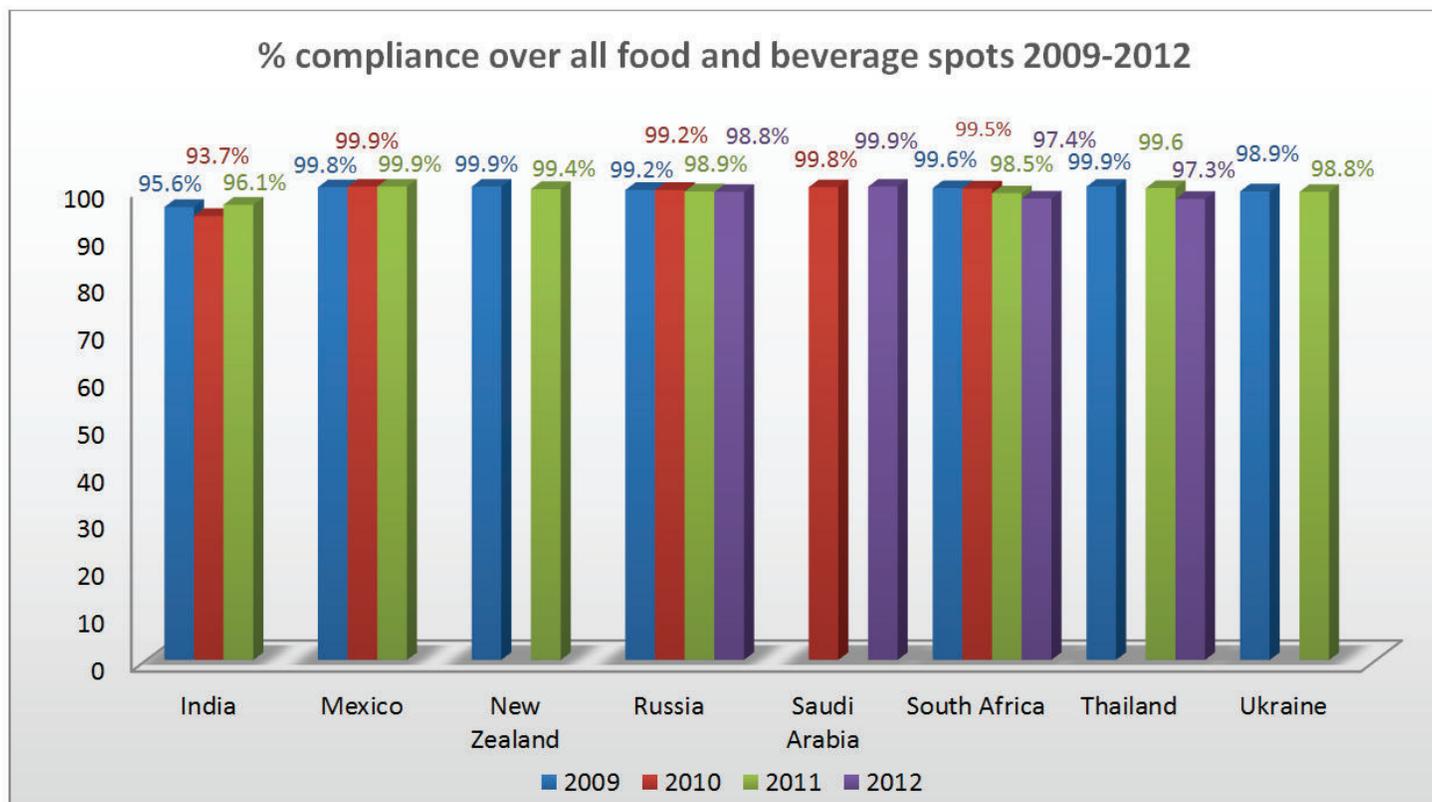
## Results

Fig. 1: Television - Overall 2012 Compliance Results (All spots included)



## Measuring Change: Trends in IFBA Member Companies' Television Advertising

Fig. 2: 2009, 2010, 2011 vs. 2012 Compliance Results (All Spots) – markets covered more than once



Compliance rates between 2009 and 2012 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 five monitored markets - Brazil, China, Russia, Singapore and South Africa - on the basis of national genre classifications used in the media industry. (See *Appendix 3 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 non-compliant.

### Results

**Print Advertising: All markets were 100% compliant: Brazil, China, Russia, Singapore and South Africa.**

## Internet Compliance Monitoring

### Methodology

- A list of children's websites in each of the five markets monitored - Brazil, China, Russia, Singapore and South Africa - was selected by Accenture's local offices to represent a sample of child-oriented websites. (See *Appendix 2 for a list of the monitored websites*)
- The websites were accessed over a period of three weeks during the second half of 2012 to check for advertising for IFBA member companies' products not meeting nutritional criteria.
- Any advertisement for such products on any of these websites was deemed non-compliant.

### Results

**Internet Advertising: All markets were 100% compliant: Brazil, China, Russia, Singapore and South Africa.**

## **Appendix 1: Television Channels Monitored**

### **China**

Chinese Business Network (24)  
 Dragon TV (24)  
 HaHa TV (24)  
 Shanghai East Movie (24)  
 Shanghai Education TV (24)  
 Shanghai TV Arts Humanities (24)  
 Shanghai TV Documentary (24)  
 Shanghai TV Entertainment (24)  
 Shanghai TV Great Sports (24)  
 Shanghai TV International (24)  
 Shanghai TV News (24)  
 Shanghai TV TV Drama (24)  
 Shanghai TV Young (24)

### **Colombia**

A&E  
 FX  
 AXN  
 History  
 Canal Caracol  
 MTV  
 Canal Fox  
 National Geographic  
 Canal RCN  
 Nickelodeon  
 Canal UNO  
 Sony  
 Cartoon Network  
 Space  
 Citytv  
 TelePacífico  
 Discovery Channel  
 The Film Zone  
 Discovery Home & Health  
 TNT  
 Discovery Kids  
 Universal  
 E! Entertainment  
 Utilísima  
 Fox Sports  
 Warner Channel

### **Malaysia**

8TV  
 Asian Food Channel  
 Astro Discovery  
 Astro Ng  
 Astro Ria  
 AXN  
 DISNEY  
 Hallmark Channel  
 HUA HEE DAI  
 NTV7  
 PRIMA  
 RTM1  
 RTM2  
 STAR WORLD  
 TV3  
 TV9  
 WAH LAI TOI

### **Russia**

2X2  
 Domashny  
 Kanal Disney  
 Mtv  
 Muz Tv  
 Ntv  
 Peretz  
 Pervy Kanal  
 Pyaty Kanal  
 Ren Tv  
 Rossiya 1  
 Rossiya 2  
 Ru.Tv  
 Sts  
 Tnt  
 Tv Tsentr  
 Tv-3  
 Zvezda

### **Saudi Arabia**

Abu Dhabi Al Oula  
 Mbc 1  
 Abu Dhabi Sport 1  
 Mbc 2  
 Al Arabiya  
 Mbc 3  
 Al Bedaya  
 Mbc 4  
 Al Jazeera Euro Event  
 Mbc Action  
 Al Jazeera Sports +1  
 Mbc Drama  
 Al Jazeera Sports +10  
 Mbc Max  
 Al Jazeera Sports +2  
 Melody Aflam  
 Al Jazeera Sports +3  
 Melody Drama  
 Al Jazeera Sports +9  
 Melody Hits  
 Al Jazeera Sports 1  
 National Geographic Abu Dhabi  
 Al Mehwar  
 Rotana Cinema  
 Al Rai Tv  
 Rotana Clip  
 Cartoon Network Arabic  
 Rotana Khaleejiah  
 Dream 1  
 Rotana Masriya  
 Dream 2  
 Rotana Music  
 Dubai One Tv  
 Sama Dubai  
 Dubai Tv  
 Saudi Sport  
 Esc  
 Saudi Tv 1  
 Fatafeat  
 Sky News Arabia  
 Fox  
 Stoon  
 Fox Movies

Toyor Al Janah 1  
 Lbc Sat  
 Toyor Al Janah 2  
 Mazzika  
 Zee Aflam

### South Africa

Disney XD  
 DSTV MTV Europe  
 Hallmark  
 DSTV Action TV  
 DSTV National Geographic  
 Kyk Net  
 DSTV Africa Magic  
 DSTV New Supr Sport 4  
 MK89  
 DSTV BBC ENTERTAINMENT  
 DSTV Sony Entertainment  
 MNET  
 DSTV BBC KNOWLEDGE  
 DSTV SS4/UPDATE  
 M-Net Analogue  
 DSTV BBC LIFESTYLE  
 DSTV Style Network  
 M-Net Stars  
 DSTV Big Brother  
 DSTV Super Sport 1  
 Movie Magic 1  
 DSTV Boomerang  
 DSTV Super Sport 2  
 Movie Magic 2  
 DSTV Cartoon  
 DSTV Super Sport 3  
 Mzansi Magic  
 DSTV Channel O  
 DSTV Super Sport 5  
 Nickelodeon  
 DSTV Crime & Investigation  
 DSTV Super Sport 6  
 SABC1  
 DSTV Discovery  
 DSTV Super Sport 7  
 SABC2  
 DSTV Discovery World  
 DSTV Trace  
 SABC3  
 DSTV E! ENTERTAINMENT  
 DSTV Travel  
 Series  
 DSTV ESPN  
 DSTV Vuzu  
 Sony Max  
 DSTV History Channel  
 ENews  
 Soweto TV/ DSTV Soweto TV  
 DSTV Magic World  
 ETV  
 Studio Universal  
 DSTV MTV Base  
 Food Network

### Thailand

Acts  
 Bang  
 Cartoon Club  
 CH11  
 CH3  
 CH5  
 CH7  
 CH8  
 CH9  
 Fantv  
 Gang Cartoon  
 Green  
 Jatingja  
 M Channel  
 Media Channel  
 Media News  
 Miracle  
 Mongkol  
 Nation  
 Sabaidee  
 Samrujloke  
 Saranair  
 Spring News  
 Tv Pool Music  
 Voice Tv  
 Workpoint Tv  
 You Channel

## Appendix 2: Websites monitored

### **Brazil**

criancas.uol.com.br  
 atrevidinha.uol.com.br  
 joguim.com  
 folha.com.br/folhinha  
 disney.com.br  
 cartoonnetwork.com.br  
 discoverykidsbrasil.com  
 mundonick.uol.com.br  
 turmadochaves.com (Off-line)  
 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**

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.baidu.com/  
 www.hongdaishu.com/  
 www.sst.org.cn/

### **Russia**

http://www.smeshariki.ru/  
 http://www.luntik.ru/  
 www.barbi.ru  
 www.tvidi.ru  
 koshki-mishki.ru  
 dtsait.ru  
 pae-alina.narod.ru  
 dvdmulti.ru  
 leshiki.ru  
 murzilka.org  
 Klepa.ru  
 teremoc.ru  
 geolenok.ru  
 classmag.ru  
 scubiland.ru  
 wings-online.ru  
 multxit.ru  
 disney.ru

### **Singapore**

http://entertainment.xin.msn.com/en/tv/okto/  
 http://www.nick-asia.com/  
 http://www.cartoonnetwork.com  
 http://home.disney.com.sg/  
 http://www.toysrus.com.sg/  
 http://www.toyshunt.com.sg/  
 http://cf-vanguard.com/en/shop/  
 http://www.brainpop.com/  
 http://www.knowledgeadventure.com/default.aspx  
 http://www.nickjr.com/  
 http://www.nick.com/  
 http://pbskids.org/  
 http://www.zoo.com.sg/kidzworld/  
 http://kids.yahoo.com/  
 http://www.tomandjerryworld.com/

### **South Africa**

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/  
 lego.com  
 barbie.com  
 kids.yahoo.com

### **Appendix 3: Print titles monitored**

#### **Brazil**

Almanaque da Mônica  
 Heróis Marvel  
 Disney Princesas  
 Recreio  
 Mickey  
 Carrossel  
 Turma da Mônica Jovem  
 Luluzinha  
 Nintendo World  
 Homem-Aranha

#### **China**

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

#### **Russia**

Wings  
 Scooby Doo  
 Spider man  
 Luntik  
 Smeshariki  
 Klassny  
 Geolenok  
 Hello Kitty  
 Hy Pogodi  
 Cars  
 Murzilka  
 Prostikvashino  
 Tom and Jarry  
 Winnie the Pooh  
 Disney  
 Veselie Kartinki

#### **Singapore**

Princess Magazine  
 Disney Junior  
 Charlie and Lola  
 Mat Yoyo  
 Asian Geographic Junior  
 Ben 10 Magazine  
 Phineas and Ferb  
 Transformers  
 Barney Magazine  
 Disney Pixar Cars  
 Toy Story  
 Young Generation

#### **South Africa**

Barbie Magazine- Disney  
 Disney and Me- Disney  
 Hannah Montana- Disney  
 Princess- Disney  
 Cars- Disney  
 The Lion King- Disney  
 Hoezit  
 MiniMag  
 National Geographic Kids  
 Disney Junior  
 Speel