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2014 Compliance Monitoring Report  
For the International Food & Beverage Alliance

On Global Advertising in Television, Print and Internet

April 2015

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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, McDonald's, Mondelez, 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 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, or prohibit advertising to children under twelve altogether, and promote physical activity. IFBA members also committed to third-party monitoring of the implementation of this commitment globally.

In September 2014, IFBA engaged Accenture 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 scientific 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 where 35% or more of the audience is under 12 years.

The monitoring exercise has been on-going since 2009. This report presents the 2014 results and illustrates a trend since 2009.

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

## Overall Methodology

We independently monitored seven markets for television advertising, five markets for print advertising and five markets for internet advertising. We conducted the monitoring exercise as a random sample of the companies' advertisements. The exercise was performed during the second half of 2014.

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.

To monitor compliance with television advertising, Accenture:

- Examined all advertising spots<sup>2</sup> 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 over 35% of the audience was composed of children under 12 years of age<sup>3</sup>; and
- 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 whether any of these contained any advertising by IFBA members.

There is no reliable demographic audience data for many websites. Therefore, Accenture 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> Spot means each individual advertising activity, i.e. the airtime used by the advertiser.

<sup>3</sup> Please see appendices for exact age group definitions for each market, which depend on locally available data segments.

## Summary of Key Results

### 2014 Compliance Rates

#### **Television: overall compliance rate is 88.5%**

This result is based on the review of more than one million advertising spots (1,156,540) promoting products by IFBA members broadcast in China (Beijing), Colombia, India, Malaysia, South Africa, Turkey, and the United Arab Emirates (UAE) 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 35%.

99,102 instances of non-compliance were identified. Of these, a high proportion (98,758) were spots aired during the night (21:00-05:59) or spots with less than 1 GRP<sup>4</sup>. Statistical anomalies may occur when looking at spots with such a low sample size. For such spots, slight viewership changes in the audience can lead to large swings in the percentage of audience composition. If very few viewers are watching a late-night program, for example, but one is under 12, the total audience composition may exceed 35% under 12. Though the profile can show a majority child audience share during low GRP levels, these programmes tend not to be directed at children. Nonetheless, these spots were considered to be non-compliant.

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

46 publications were identified as 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 analysed: Brazil, China, India, South Africa, and Singapore.

#### **Internet: overall compliance rate is 99.5%**

We did not find any non-compliant advertisements for products advertised by IFBA members on any of the websites reviewed in China, India, South Africa, and Singapore. There were five instances of non-compliant advertisements in Brazil.

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<sup>4</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).

### **Methodology**

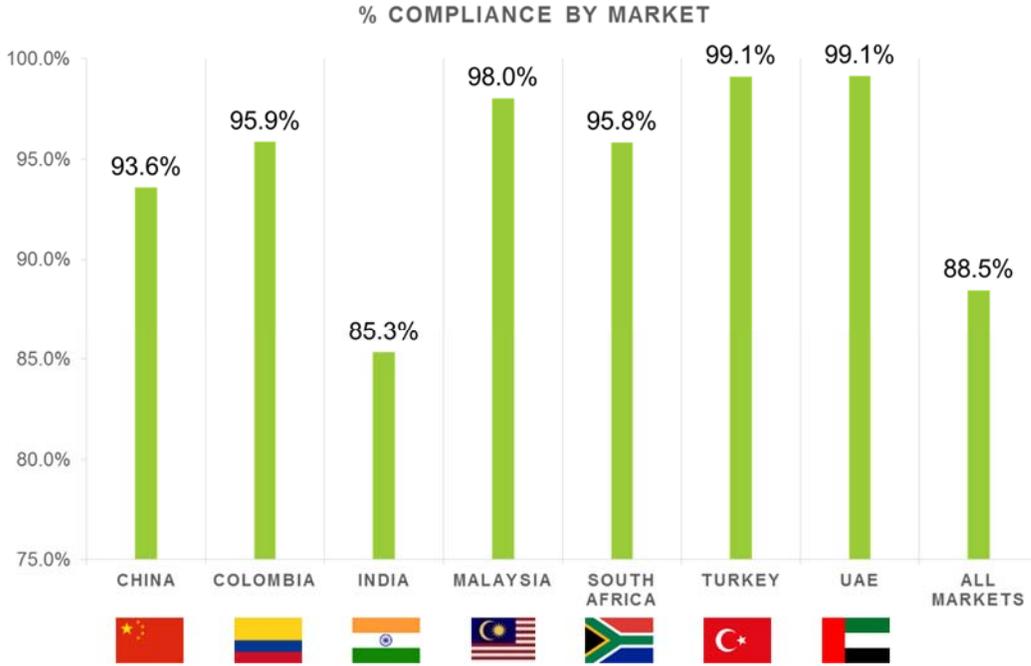
- For the purposes of this verification, seven sample markets were chosen: China (Beijing), Colombia, India, Malaysia, South Africa, Turkey, and the United Arab Emirates (UAE). (See Appendix 1 for a list of the monitored television channels)
- All spots by IFBA member companies aired in the 7 markets from 1 April to 30 June 2014 were collected. Total sample size: 1,156,540 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 where over 35% were children under 12 years of age.<sup>5</sup>
- All spots for products that IFBA member companies have committed not to advertise to children under 12 years of age which aired at times with an audience where over 35% were children under 12 years of age were deemed non-compliant.
- In the analysis we have included all platforms and channels that are monitored by market by year. Please note that for some markets the list of channels has increased compared to previous years as more channels and platforms are now monitored.

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<sup>5</sup> Please see appendices for exact age group definitions. (See footnote 3)

**Results**

**Fig. 1: Television Overall Compliance Results (All spots included) (2014)**

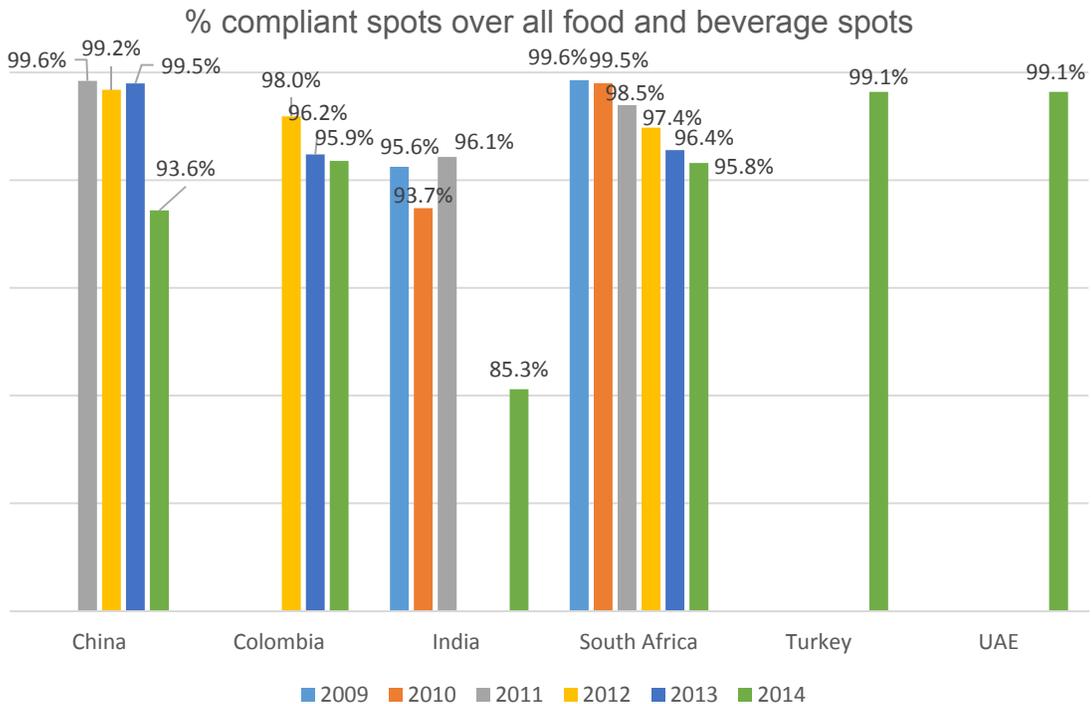


**Fig. 2: Television Overall Compliance Results (Daytime spots with greater than 1 GRP) (2014)**



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

**Fig. 3: Compliance Results (All Spots)**



When looking at all spots, we can see that since 2009, the compliance rate has always been above 90% for these markets, except India, showing 85.3% compliance in 2014.

In the years when India has been included in the monitoring exercise, India's TV channels have represented around half of all TV channels monitored, although they have doubled in number from 2009 to 2014 (120 monitored channels in India 2009, v 224 in 2014). As a result, in 2014, India's spots accounted for approximately 75% of total spots (861,530 of 1,156,540 spots), which influences heavily the overall compliance rate. However, if only daytime spots greater than 1 GRP are reviewed, i.e. those for which the audience data is reliable, (Fig. 2) the compliance rate for India increases from 85.3% to 96.6%.

In a market such as India where the number of spots is so high, reviewing the compliance rate for spots with a greater than 1 GRP becomes more important than reviewing the compliance rate for all spots, which is impacted negatively by the associated statistically unreliable audience data.

## 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, India, South Africa, and Singapore - 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 the 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, India, South Africa, and Singapore.**

## Internet Compliance Monitoring

### Methodology

- A list of younger children's websites in each of the five monitored markets - Brazil, China, India, South Africa, and Singapore - 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 2<sup>nd</sup> half of 2014 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: The overall compliance rate is 99.5%: Brazil, China, India, South Africa, and Singapore.**

There were **5** instances of non-compliance in Brazil.

## Appendix 1: Television Channels Monitored

### China (Beijing)

Beijing Kaku(24)  
Beijing TV Entertainment(24)  
Beijing TV Film & TV Series(24)  
Beijing TV Finance & Economics(24)  
Beijing TV Life(24)  
Beijing TV News(24)  
Beijing TV Satellite(24)  
Beijing TV Science & Education(24)  
Beijing TV Sports(24)  
Beijing TV Youth(24)

### Colombia

A&E  
AXN  
Cable Noticias  
Canal Caracol  
Canal de las Estrellas  
Canal RCN  
Canal TRO  
Canal UNO  
Cartoon Network  
Citytv  
Claro Sports Colombia  
Discovery Channel  
Discovery Home & Health  
Discovery Kids  
E! Entertainment  
ESPN  
ESPN +  
Film Zone  
Fox  
Fox Life  
Fox Sports  
FX  
Golden  
History  
MTV  
National Geographic  
Nickelodeon  
NTN 24  
Sony  
Space  
Studio Universal  
TeleAntioquia  
TelePacífico  
TLNoveles  
TNT

Universal  
Warner Channel

### India

&pictures  
24 GHANTA  
9X Jalwa  
9X Jhakaas  
9X M  
9X Tashan  
Aaj Tak  
Aakaash 8  
ABP Ananda  
ABP Majha  
ABP News  
ADITHYA  
Animal Planet  
Asianet  
ASIANET MOVIES  
Asianet News  
Asianet Plus  
AXN  
B4U Movies  
B4U Music  
BIG MAGIC  
BIG MAGIC GANGA  
BINDASS  
CAPTAIN TV  
Chintu TV  
Chithiram  
Chutti TV  
CINEMA TV  
CN Cartoon Network  
CNN IBN  
Colors Viacom18  
Comedy Central  
Dabangg UP UTKD Bihar  
Dangal  
DD Bangla  
DD BIHAR  
DD Lucknow  
DD National  
DD Punjabi  
DHM  
Dilli Aaj Tak  
DISCOVERY CHANNEL  
Discovery Science SCI  
Discovery Tamil  
Discovery Turbo  
Disney Channel

Disney XD  
DK Discovery Kids  
DY 365  
E 24  
ETV  
ETV Bangla  
ETV Gujarati  
ETV Kannada  
ETV Marathi  
FILMY  
FOCUS HIFI  
FOCUS NE  
FoodFood  
FOX LIFE  
FX  
GEMINI  
Gemini Comedy  
Gemini Movies  
Gemini Music  
HBO  
Headlines Today  
History TV18  
HUNGAMA  
IBN 7  
IBN Lokmat  
India News  
India News Haryana  
India News Uttar Pradesh  
India TV  
Indradhanu Rengoni  
ISAIYARUVI  
J MOVIE  
Jalsha Movies  
Janasri  
Jaya Max  
Jaya TV  
Kairali  
Kalaighar TV  
Kasturi  
Kochu TV  
Kolkata TV  
KTV  
Kushi TV  
Life OK  
M Tunes  
MAA  
Maa GOLD  
Maa Movies  
Maa Music  
Mahuaa  
Manorama News  
Mastiii  
Mazhavil Manorama

Mega TV  
MH1  
MH1 News  
Movies Now  
Movies OK  
MTV  
MUSIC F FATAFATI  
Music India  
Music Xpress  
NATIONAL GEOGRAPHIC  
NDTV Good Times  
NDTV India  
News 24  
News Live 24x7  
NEWS NATION  
News Time Bangla  
NICK  
nick jr.nickelodeon  
NTV  
OTV  
Peppers  
Pepsi MTV INDIES  
Plus Suvarna  
POGO  
POLIMER  
Polimer Kannada  
PRAG NEWS  
PTC Chakde  
PTC News  
PTC Punjabi  
PUBLIC TV  
Puthuyugam  
R RUPASI BANGLA  
Raj Digital Plus  
Raj Musix  
RAJ MUSIX KANNADA  
RAJ NEWS (Tamil)  
RAJ TV  
Ramdhenu  
Rang  
Romey NOW  
RPLUS  
S BANGLA  
SAAM  
Sahara One  
Sakshi TV  
Samay BIHAR JHARKHAND  
Samay Uttar Pradesh Uttarakhand  
Sangeet Bhojpuri  
Sarthak TV  
Seithigal  
Siripoli  
Sonic Nickelodeon

SONY AATH  
SONY ENTERTAINMENT TV  
SONY MAX  
SONY MIX  
SONY PIX  
SONY SAB  
SONY SIX  
Star Gold  
Star Jalsha  
Star Movies  
Star Movies Action  
Star Plus  
Star Pravah  
Star Sports 1  
Star Sports 2  
Star Sports 3  
Star Utsav  
Star World  
Studio N  
STUDIO ONE HD  
SUN LIFE  
Sun Music  
Sun TV  
SURYA  
SURYA MUSIC  
Suvarna  
Suvarna News 24x7  
Tarang  
Tarang Music  
Ten Sports  
TEZ  
Times Now  
TLC  
TV5 NEWS  
TV9  
TV9 KARNATAKA  
UDAYA  
Udaya Comedy  
Udaya Movies  
Udaya Music  
UTV Action  
UTV Movies  
UTV Stars  
V  
VH1  
VIJAY  
WB  
We  
Z 24 Taas  
Z Action  
Z Anmol  
Z Bangla  
Z Bangla Cinema

Z Cafe  
Z Cinema  
Z Classic  
Z ETC Bollywood  
Z ETC Punjabi  
Z Kannada  
Z Khana Khazana  
Z Marathi  
Z News  
Z Premiere  
Z Sangam  
Z Studio  
Z Talkies  
Z Tamil  
Z Telugu  
Z Zee TV  
Zindagi  
Zing  
Zoom

### **Malaysia**

8TV  
AEC  
Asian Food Channel  
ASTRO ARENA  
ASTRO CERIA  
ASTRO CITRA  
ASTRO DISCOVERY  
ASTRO NG  
ASTRO OASIS  
ASTRO RIA  
ASTRO SHUANG XING  
ASTRO SUPERSPORT  
ASTRO SUPERSPORT 3  
ASTRO WARNA  
AXN  
ESPN  
Hallmark Channel  
HUA HEE DAI  
Mustika HD  
NTV7  
ONE HD  
PRIMA  
RTM1  
RTM2  
STAR WORLD  
TV3  
TV9  
WAH LAI TOI  
XING HE

### **South Africa**

Africa Magic Movies 1

Comedy Central  
Discovery ID  
Discovery TLC  
Disney XD  
DSTV Africa Magic  
DSTV Africa Magic Plus  
DSTV Animal Planet  
DSTV BBC ENTERTAINMENT  
DSTV BBC KNOWLEDGE  
DSTV BBC LIFESTYLE  
DSTV BBC World  
DSTV Boomerang  
DSTV Cartoon  
DSTV Channel O  
DSTV CNN News  
DSTV Crime & Investigation  
DSTV Discovery  
DSTV Discovery World  
DSTV E! ENTERTAINMENT  
DSTV History Channel  
DSTV Home Channel  
DSTV Magic World  
DSTV MTV Base  
DSTV MTV Europe  
DSTV National Geographic  
DSTV New Supr Sport 4  
DSTV Sky News  
DSTV Sony Entertainment  
DSTV SS4/UPDATE  
DSTV Style Network  
DSTV Super Sport 1  
DSTV Super Sport 2  
DSTV Super Sport 3  
DSTV Super Sport 5  
DSTV Super Sport 6  
DSTV Super Sport 7  
DSTV Trace  
DSTV Travel  
DSTV Vuzu  
ENews  
ETV  
Food Network  
Fox Entertainment  
Hallmark (UNIVERSAL)  
Kyk Net  
kykNet & kie  
kykNet Musiek  
MNET  
M-Net Analogue  
M-Net Movies Action  
M-Net Movies Action Plus  
M-Net Movies Comedy  
M-Net Movies Family

M-Net Movies Premiere  
M-net Movies Showcase  
M-Net Movies Zone  
M-Net Series Reality  
M-Net Series Showcase  
M-Net Series Zone  
M-Net Stars  
Mzansi Bioskop  
Mzansi Magic  
Mzansi Music  
Mzansi Wethu  
Nickelodeon  
SABC1  
SABC2  
SABC3  
Sony Max  
Studio Universal  
Super Sport 1 HD  
Super Sport 2 HD  
Super Sport 3 HD  
Super Sport 4 HD  
Telemundo

#### **Turkey**

ATV  
FOX TV  
KANAL 7  
KANAL D  
KANALTÜRK  
SAMANYOLU TV  
SHOW TV  
STAR TV  
TRT 1  
TRT COCUK

#### **UAE**

ABU DHABI AL EMARAT  
ABU DHABI AL OULA  
ABU DHABI DRAMA  
AL AAN TV  
AL ARABIYA  
AL HADATH  
AL MEHWAR  
AL RAI TV  
ANB  
BEIN SPORTS HD1  
BEIN SPORTS HD2  
BEIN SPORTS HD3  
BEIN SPORTS HD4  
BEIN SPORTS NEWS HD  
CARTOON NETWORK ARABIC

DM TV  
DREAM 1  
DREAM 2  
DUBAI ONE TV  
DUBAI SPORTS CHANNEL  
DUBAI TV  
ESC  
FATAFEAT  
FOX  
FOX MOVIES  
LBC SAT  
MBC 1  
MBC 2  
MBC 3  
MBC 4  
MBC ACTION

MBC DRAMA  
MBC MAX  
NATIONAL GEOGRAPHIC ABU DHABI  
ROTANA AFLAM  
ROTANA CINEMA  
ROTANA CLIP  
ROTANA KHALEEJIAH  
ROTANA MASRIYA  
ROTANA MUSIC  
SAMA DUBAI  
STOON  
TOYOR AL JANAH  
WANASAH  
ZEE AFLAM  
ZEE ALWAN  
ZEE FILM HINDI

## Appendix 2: Print Titles Monitored

### Singapore

Princess Magazine  
Disney Junior  
Mat Yoyo  
Asian Geographic Junior  
Phieas And Fears  
Transformers  
Barney Magazine  
Disney Pixar Cars  
Toys Story  
Young Generation

### India

Champak  
Nandan  
Tinkle  
Bal Bharti  
Akad Bakad  
Magic pot  
Nanhe Smart  
Brainwave  
Kids Explore  
Highlights Champs  
Highlights Genies

### China

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

### Brazil

Luluzinha  
Recreio (Abril)  
Princesas (Abril)  
Quadrinhos de Disney (Abril)  
Clube (Tambor)  
Nintendo World (Tambor)  
Egw (Tambor)  
Barbie (Panini)  
CARTOON NETWORK (Panini)  
REVISTA OFICIAL HORA DE  
AVENTURA (Panini)

### South Africa

Barbie Magazine- Disney  
Disney and Me- Disney  
Princess- Disney  
Hoezit  
MiniMag  
National Geographic Kids  
Disney Junior

## Appendix 3: Websites Monitored

### Brazil

[www.crianças.uol.com.br/](http://www.crianças.uol.com.br/)  
<http://www.nick.com/>  
<http://www.nickjr.com/>  
[www.disney.com.br](http://www.disney.com.br)  
[www.cartoonnetwork.com.br](http://www.cartoonnetwork.com.br)  
[www.discoverykidsbrasil.com](http://www.discoverykidsbrasil.com)  
<http://www.jogosedemeninas.net/>  
[www.sbt.com.br/clubinhosbt/](http://www.sbt.com.br/clubinhosbt/)  
<http://www.pollypocket.com/pt-br>  
[www.iguinho.com.br](http://www.iguinho.com.br)  
[www.dolls.com.br](http://www.dolls.com.br)  
<http://www.nintendoworld.com.br/>  
[www.folha.com.br/folhinha](http://www.folha.com.br/folhinha)  
<http://tvratimbum.cmais.com.br/>  
<http://www.galinhapintadinha.com.br/>  
<http://www.gamebaby.net/>  
<http://ladygames.com/>  
<http://gameohyeah.com/>  
[mundogloob.globo.com/](http://mundogloob.globo.com/)  
<http://www.manygames.com/>  
<http://go3k.com/>  
<http://www.barbie.com/pt-br>

### China

<http://www.61baobao.com/>  
<http://17roco.qq.com/>  
<http://seer.61.com/>  
<http://www.tom61.com/>  
<http://www.dol.cn/index.shtml>  
<http://www.chunmiao.cn/>  
<http://kid.qq.com/>  
<http://aobi.100bt.com/>  
<http://www.beva.com/>  
<http://www.060s.com>  
<http://www.hezi.com/>  
<http://www.61f.com>  
<http://www.tongnian.com/>  
<http://www.61ertong.com/>  
<http://www.hongniba.com.cn/>  
<http://xj.youerka.com.cn/>  
<http://www.ccppg.com.cn/>  
<http://www.xugu.net/>  
<http://www.hongdaishu.com/>  
<http://g.beva.com/xuetang/>

## Singapore

<http://www.oktoasia.com/>  
<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/kidzworld.html>  
<http://kids.yahoo.com/>  
<http://www.tomandjerryworld.com/>

## South Africa

<http://www.disneyjunior.co.za>  
[www.spurtribe.co.za](http://www.spurtribe.co.za)  
[www.toysrus.co.za](http://www.toysrus.co.za)  
[www.lego.com](http://www.lego.com)  
[www.paddlepop.co.za](http://www.paddlepop.co.za)  
<http://www.coolmath-games.com/>  
<http://pbskids.org/games/>  
<http://www.girlsgogames.com/>  
<http://www.cartoonnetwork.com/>  
<http://www.nick.com/>  
<http://www.nickjr.com/>  
<http://www.clubpenguin.com/>  
<http://www.stardoll.com/>  
<http://www.primarygames.com/>  
<http://www.neopets.com/>  
<http://www.animaljam.com/>  
<http://www.poptropica.com/>  
<http://www.moshimonsters.com/>  
<http://www.funbrain.com/>  
<http://webkinznewz.ganzworld.com/>

## India

<http://www.cartoonnetworkindia.com/>  
<http://www.pogo.tv/>  
<http://disney.in/index.jsp>  
<http://www.hungamatv.com/>  
<http://kids.discovery.com/>  
<http://www.nickindia.com/>  
COOLMATH-GAMES.COM  
<http://kids.zapak.com/>  
COOLMATH-GAMES.COM  
<http://www.hindukids.org/>  
<http://www.thekidzpage.com/>  
<http://www.kidsfront.com/>  
<http://www.playkidsgames.com/>  
<http://www.kidsone.com/>  
<http://www.123peppy.com/>  
<http://www.primarygames.com/>  
<http://www.kidzworld.com/>  
<http://www.gamekidgame.com/>  
<http://www.kidswebindia.com/>  
a game.com  
girlsgogames.com  
addictinggames.com  
Mattelsites  
girlgames.com  
pitara.com  
kidsworldfun.com

## Appendix 4: TV Age Group Definitions

<b>China (Beijing)</b>	<b>4 – 12</b>
<b>Colombia</b>	<b>4 – 11</b>
<b>India</b>	<b>4 – 14</b>
<b>Malaysia</b>	<b>4 – 14</b>
<b>South Africa</b>	<b>4 – 11</b>
<b>Turkey</b>	<b>5 – 11</b>
<b>UAE</b>	<b>3 – 14</b>