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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.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.

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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¹ 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.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 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 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 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.

² 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.

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

⁴ 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)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.

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.

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 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

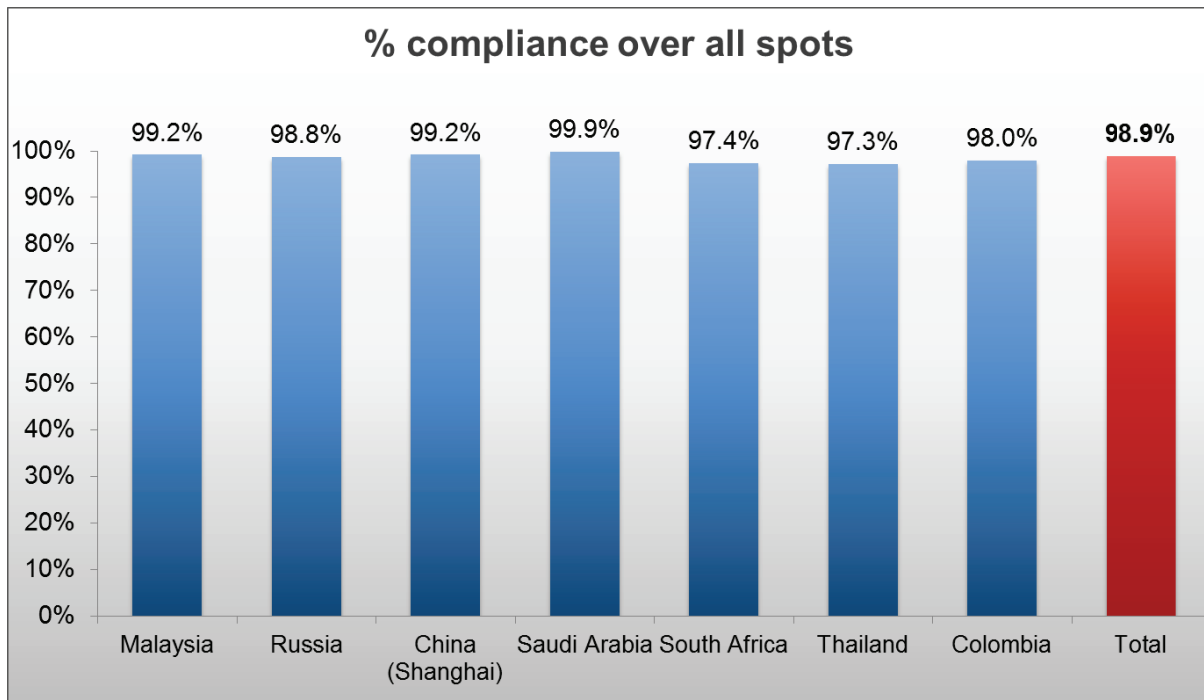
Methodology

- 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.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 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*)

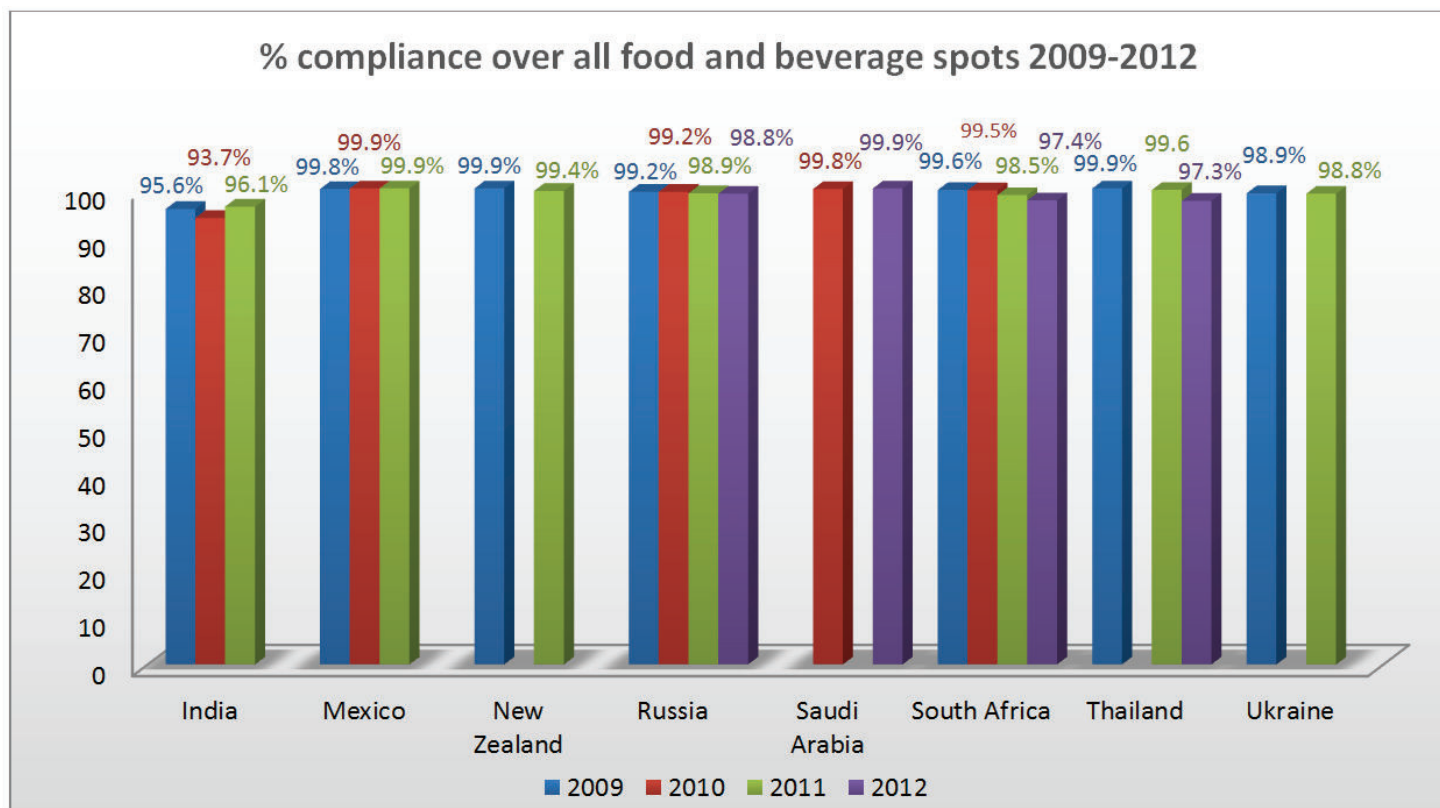
Results

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