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2012 Compliance Monitoring Report
For the International Council of Beverages Associations
On Global Advertising in Television, Print and Internet

March 2013

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Introduction

Accenture Media Management has been commissioned by members of the International Council of Beverages Associations (ICBA).

ICBA represents the beverage industry on a global level to ensure issues affecting the international non-alcoholic beverage industry are monitored and provides a forum for the international beverage industry to convene and work on issues of mutual interest. Members of ICBA include non-alcoholic beverage companies from around the world and major national and international beverage associations that represent those companies.¹

In September 2012, ICBA members engaged us to monitor compliance in television, print and internet advertising with the ICBA Guidelines on Marketing to Children. Accenture monitored compliance of ICBA members The Coca-Cola Company and PepsiCo, Inc., with the ICBA's Guidelines on Marketing to Children.

The ICBA Guidelines on Marketing to Children include a commitment not to place any marketing communication in any paid, third party media whose audience consists of 50 percent or more of children under the age of 12. This commitment covers broadcast (TV and radio), print and digital media (including Internet and phone messages), and cinema (including product placement). The Guidelines apply to all non-alcoholic beverages other than water (mineral, source and purified), fruit juice and dairy-based beverages, as such segments are not covered by all ICBA members.

In adopting the Guidelines, ICBA members committed to public reporting on implementation.

In 2009, 2010 and 2011 we conducted a similar monitoring exercise. This report presents the 2012 results and a comparison of the results with 2009, 2010 and 2011.

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¹ For more information, please see <http://www.icba-net.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 covered the period 1 April – 30 June 2012 for TV, October 2012 for print and online, and the analysis was carried out in the second half of 2012.

All the media research data analysed 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 we:

- Examined all advertising spots² for products marketed by ICBA members aired in the selected markets;
- Reviewed those spots for products not meeting ICBA Guidelines on Marketing to Children against product lists supplied by ICBA members; All spots were included for companies that do not advertise any of their products to children under 12;
- Analysed audience composition at the time of broadcast in order to identify those spots aired when the majority of the audience was composed of children under 12 years of age³;
- Counted these spots as non-compliant with the ICBA policy.

For print advertising, we isolated all print publications targeting children under 12 years of age in the selected markets, and reviewed each of these to determine if any of these contained any advertising by ICBA 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 Spot means each individual advertising activity, i.e. the airtime used by the advertiser.

³ In Thailand the age threshold data analysed by Accenture was under 14 years of age instead of 12 years. This is because the data available to media agencies in those countries is under 14 years.

Summary of Key Results

A. 2012 Compliance Rates

Television: overall compliance rate is 99.1%

This result is based on the review of nearly quarter of a million advertising spots (241,258) promoting products by ICBA members broadcast in Malaysia, Russia, China (Shanghai region), Saudi Arabia, South Africa, Thailand and Colombia during the monitoring period. Instances of non-compliance represent all spots for products not meeting ICBA Guidelines aired at a time when the reported audience share of children under the age of 12 exceeded 50%.

2002 instances of non-compliance were identified. Of these, a high proportion were spots aired during general viewing times and not on children's programmes which produced profiles of more than 50% of the audience being under 12 years of age. These are statistical anomalies due to small audience sizes. In most cases, these spots had ratings below 1 Gross Rating Point (GRP) for children, meaning less than 1% of the under-12 years of age viewing population.⁴ Nonetheless, these spots were considered to be non-compliant.

Print: overall compliance rate is 100%

Over 50 publications were identified as targeting children under 12 years of age. We did not find any advertisements among these publications that promoted products of ICBA members in the countries analysed: Brazil, China, Russia, Singapore and South Africa.

Internet: overall compliance rate is 100%

We did not find any non-compliant advertisements for products advertised by ICBA members on any of the websites reviewed in Brazil, China, Russia, Singapore and South Africa.

⁴ Gross Rating Points (GRPs) measure the size of an audience reached by a specific media vehicle or schedule. The small audience size means that the reported audience share data is statistically not reliable. Audience data can be skewed if even very few viewers that are part of the measurement panel misreport their viewing (e.g. reporting a child under 12 years of age watching instead of an adult in a given household).

B. Comparison with 2009 Results

In 2009, the compliance monitoring exercise was conducted in Argentina, Canada, China (Shanghai region), India, Indonesia, Mexico, New Zealand, Russia, South Africa, Thailand, Ukraine and the U.S.A. In 2012, we repeated compliance monitoring in three of these markets to get a comparison – Russia, South Africa and Thailand.

Since 2009, the compliance rate has always been above 94% for all markets in television. Print and internet are stable with 100% compliance rate from 2009 to 2012. *(See results on page 10.)*

Television Compliance Monitoring 2012

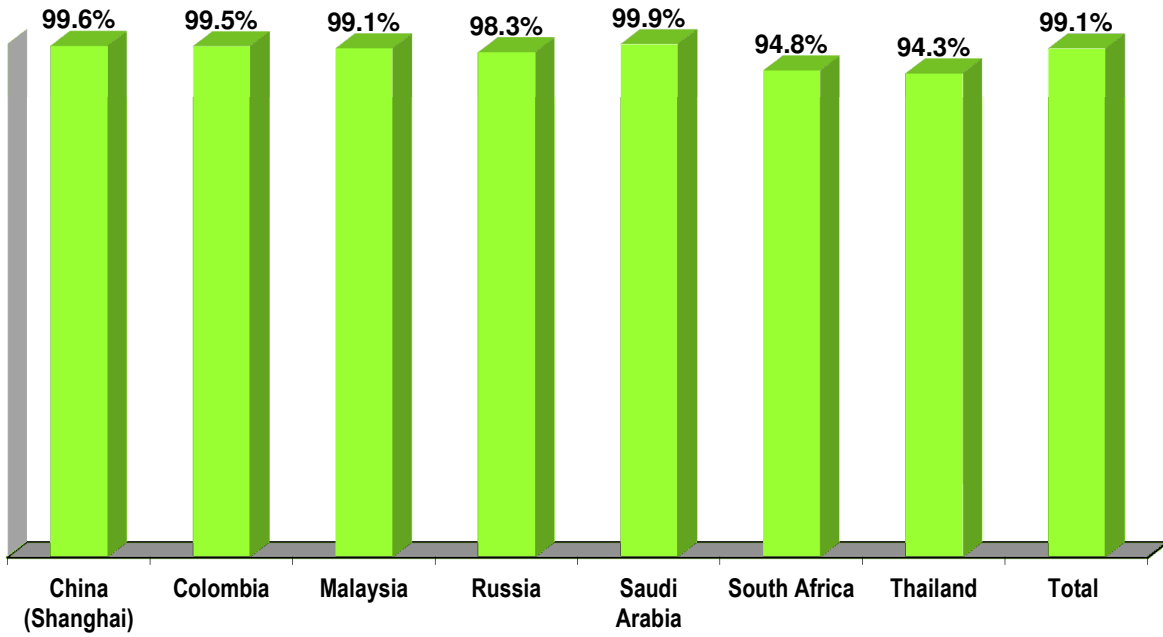
Methodology

- 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 the monitored television channels.)
- All spots by ICBA member companies aired in the seven markets from 1 April – 30 June 2012 were collected. Total sample size: 241,258 spots.
- Spots for products that do not meet ICBA 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.⁵
- All spots for products that ICBA 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.

⁵ In Thailand the age threshold data analysed by Accenture in 2012 was under 14 years of age instead of 12 years. (See footnote 2)

Results

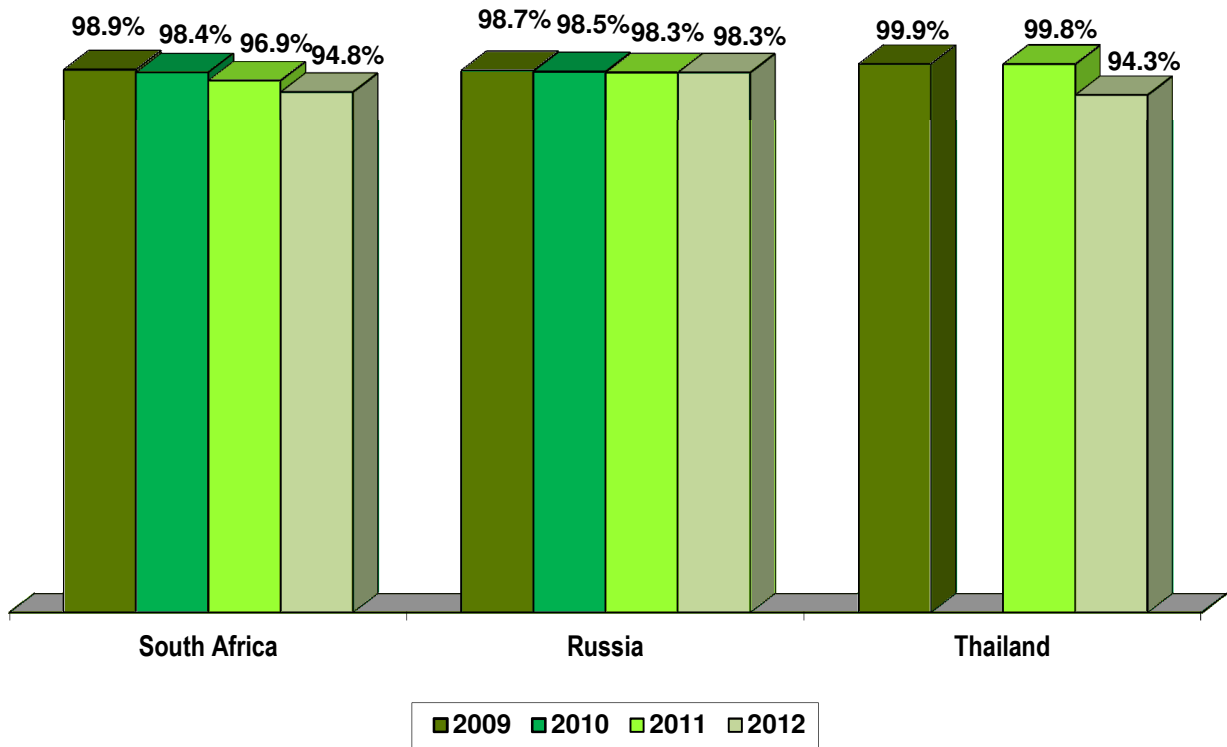
**Fig 1: Television Overall Compliance Results (All spots included)
(2012)**



■ % Compliant spot over all spots

Measuring Change: Trends in ICBA 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 2 for a list of the print monitored 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 ICBA 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 younger children's websites in each of the five monitored markets - Brazil, China, Russia, Singapore 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 2012 to check for advertising content relating to the non-compliant products from ICBA members.
- Any advertisement for such products in 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
Tovor Al Janah 1
Lbc Sat
Tovor 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: 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
Veseliye 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

Appendix 3: Websites Monitored

Brazil

criancas.uol.com.br
atrevinha.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
br.pollypocket.com
qdivertido.com.br

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

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

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/
kids.yahoo.com
spongebob.nick.com/
lego.com
barbie.com
cartoonnetwork.com
kids.yahoo.com