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2010 Compliance Monitoring Report
For the International Council of Beverages Associations
On Global Advertising in Television, Print and Internet

August 2011

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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.

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

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

Overall Methodology

We independently monitored eight markets for television advertising, five markets for print advertising and four 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 2010 and the analysis was carried out in the second half of 2010.

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 we:

- Examined all advertising spots¹ 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 age²;
- 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.

¹ Spot means each individual advertising activity, i.e. the airtime used by the advertiser.

² In India and Saudi Arabia 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. 2010 Compliance Rates

Television: overall compliance rate is 95.7%

This result is based on the review of more than half a million advertising spots (581,147) promoting products by ICBA members broadcast in Chile, China (Beijing region), India, Mexico, Russia, the Kingdom of Saudi Arabia, the Philippines and South Africa 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%.

24,789 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.³ Nonetheless, these spots were considered to be non-compliant.

Print: overall compliance rate is 100%

For the purposes of this verification, five sample markets were chosen: China, India, Mexico, the Philippines and South Africa. Over 100 publications were analyzed for advertisements 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 analyzed.

Internet: overall compliance rate is 100%

For the purposes of this verification, four sample markets were chosen: India, Mexico, Russia and South Africa. We did not find any non-compliant advertisements for products advertised by ICBA members on any of the websites reviewed.

³ 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 2010, in addition to the new markets we monitored, we repeated compliance monitoring in four of these markets to get a comparison – India, Mexico, Russia and South Africa.

The overall compliance monitoring results are comparable year-on-year – and 100% for print and internet advertising. Overall variances are marginal. *(See Fig. 2 on page 9).*

Television Compliance Monitoring 2010

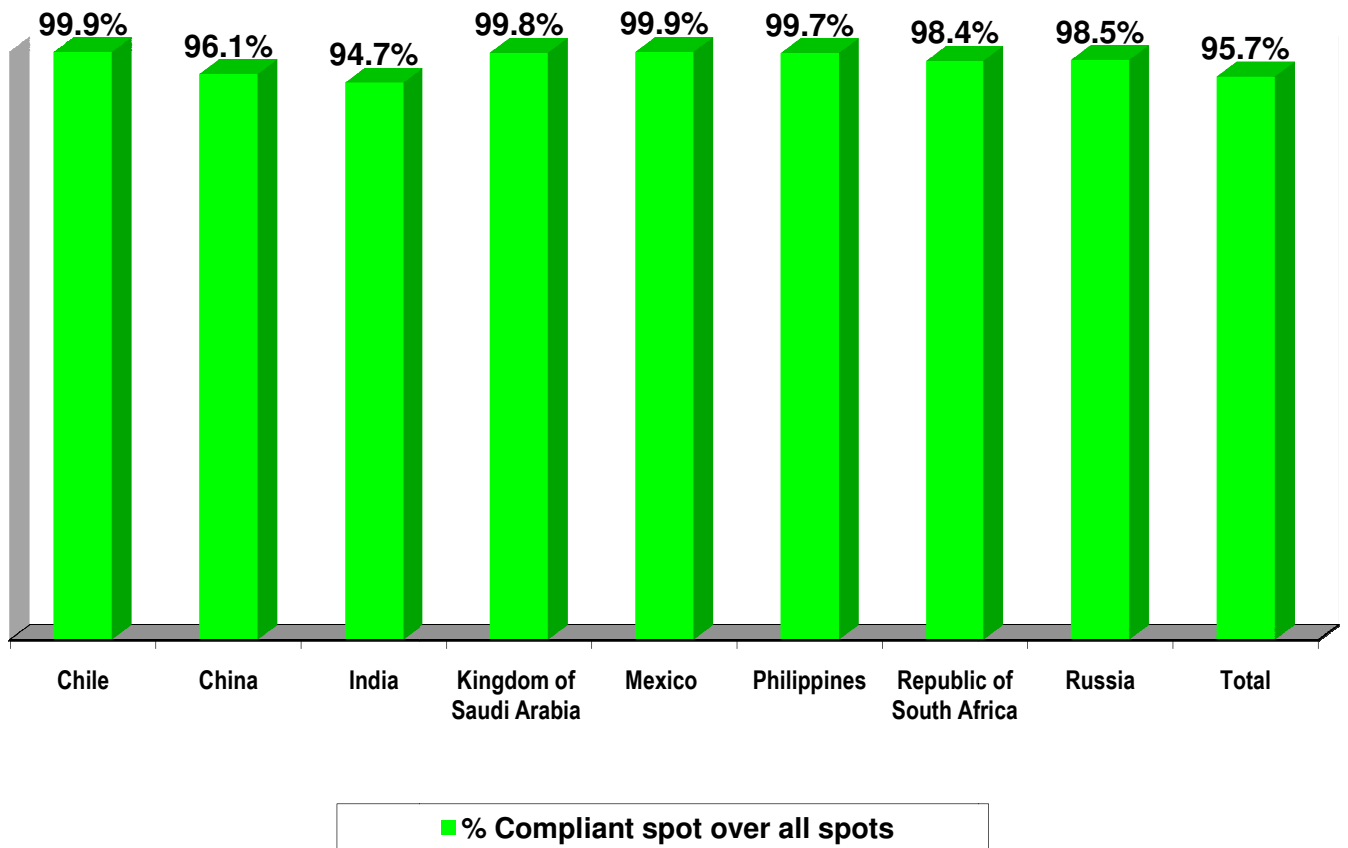
Methodology

- For the purposes of this verification, eight sample markets were chosen: Chile, China (Beijing Region), India, Kingdom of Saudi Arabia, Mexico, Philippines, Republic of South Africa and Russia. *(See Appendix 1 for a list of the monitored television channels)*
- All spots by ICBA member companies aired in the eight markets from 1 April to 30 June were collected. Total sample size: 581,147 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.⁴
- 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.

⁴ In India and Saudi Arabia the age threshold data analysed by Accenture was under 14 years of age instead of 12 years. *(See footnote 2)*

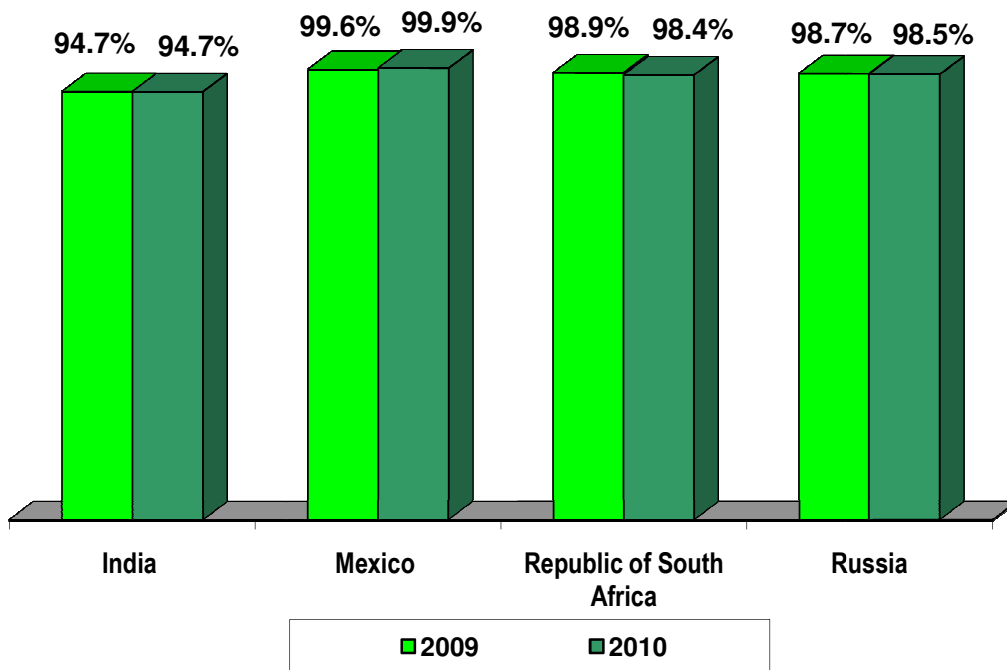
Results

Fig 1: Television Overall Compliance Results (All spots included) (2010)



Measuring Change: Trends in ICBA Member Companies' Television Advertising

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



Print Compliance Monitoring

Methodology

- For the purposes of this verification, five sample markets were chosen: China, India, Mexico, the Philippines and South Africa.
- As age-specific readership data for children's print titles is not available, Accenture prepared a list of children's titles in four of the five monitored markets on the basis of national genre classifications used in the media industry. (*See Appendix 2 for a list of the monitored print titles*)
- In Mexico, Accenture gathered the full lists of all printed publications where ICBA members published commercial communications in the period 1 April – 30 June and analysed whether any of these publications were aimed at children under 12 years of age.
- There was no data available for children's titles in the following markets: Chile, Russia and the Kingdom of Saudi Arabia.
- 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 monitored markets (China, India, Mexico, the Philippines and South Africa) were 100% Compliant.

Internet Compliance Monitoring

Methodology

- For the purposes of this verification, four sample markets were chosen: India, Mexico, Russia and South Africa.
- A list of younger children's websites in each of the four monitored markets was compiled 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 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 monitored markets (India, Mexico, Russia and South Africa) were 100% compliant.

Appendix 1: Television Channels Monitored

Chile

Red Television Ch4
Univ Catolica Ch13
Television Nac Ch7
Mega Ch9
Chilevision Ch11
Telecanal Ch2
UCV Television Ch5

China

Beijing Satellite
Beijing TV Entertainment Channel
Beijing TV Science and Education Channel
Beijing TV Film and TV Series Channel
Beijing TV Sports Channel
Beijing TV Life Channel
Beijing Kaku Cartoon Satellite Channel
Beijing TV Finance and Economics Channel
Beijing TV Children's Channel
Beijing TV Public Service Channel

India

9X M
24 Ghanta TV
9X
Aaj Tak
Aakaash (Bangla)
Adithya TV
Amrita TV
Animal Planet
Asianet / Asianet Plus
AXN
B4U Music
Bindass
Cartoon Network
Channel V
Chintu TV

Chutti TV
CNBC AWAAZ / TV18
CNN IBN
Colors
DD Delhi/News/Punjabi
DD1
DD10 Sahyadri (Marathi)
DD16 Lucknow
Dilli Aaj Tak
Disney Channel / XD
E 24
Eenadu TV(ETV Telugu)
ESPN
ETC Punjabi
ETV Bangla
ETV Kannada
ETV Marathi
ETV2 Telugu News
FILMY
Fox History & Entertainment
Gemini Comedy
Gemini Movies
Gemini Music
Gemini News
Gemini TV
HBO
Headlines Today
HM TV
Hungama TV
IBN 7
Imagine TV / Showbiz
India TV
Isaiyaruvi
Jaya Max
Jaya TV
Kairali
Kalaigarnar TV
Kasturi

Kiran TV
KTV
Kushi TV
Maa Music
Maa Telugu
Mahuaa TV
Manoranjan TV
MAX
Mega TV
MH1
MH1 News
Mi Marathi
MTV
Music India
National Geographic
Channel
NDTV 24x7 / Good
Times
Neo Cricket
News Live
Nickelodeon
PIX
POGO
Raj Digital Plus
Raj Musix
Raj TV
Rupashi Bangla
SAB
Sahara One
Sakshi TV
Sangeet Bangla
Siripoli
Sony Entertainment TV
Star Gold
Star Jalsha
Star Movies
Star News
Star One
Star Plus
Star Pravah
Star Utsav
Star World

Sun Music
Sun TV
Surya TV
Suvarna
Tara Muzik
Tarang
TLC
U2
Udaya Movies
Udaya TV
UTV Action / Movies
VH1
Vijay TV
World Movies
Zee Bangla
Zee Cafe
Zee Cinema
Zee Kannada
Zee Marathi
Zee News
Zee Studio
Zee Talkies
Zee Telugu
Zee TV
Zing
Zoom

Kingdom of Saudi Arabia

ABU DHABI AL OULA
AL ARABIYA
AL MEHWAR
AL RAI
DUBAI ONE TV
DUBAI TV
ESC
FATAFEAT
FOX MOVIES
FOX SERIES
LBC SAT
MAZZIKA
MBC 1

MBC 2
MBC 3
MBC 4
MBC ACTION
MBC MAX
MELODY AFLAM
MELODY ARABIA
MELODY HITS
ROTANA CINEMA
ROTANA CLIP
ROTANA KHALEEJIAH
ROTANA MUSIC
SAMA DUBAI
SAUDI SPORT
SAUDI TV 1
SPACETOON ARABIC

Mexico

9 GALAVISION
A&E MUNDO
AXN
CANAL 2
CANAL 5
CANAL 7
CANAL 13
CANAL 52
CARTOON NETWORK
DISCOVERY CHANNEL
DISCOVERY KIDS
DISNEY XD (JETIX-FOX KIDS)
E! ENTERTAINMENT
ESPN

Philippines

ABC/TV5
ABS-CBN
AXN-NET
BTV
CARTOON NETWORK
DISNEY CHANNEL
GMA
JACK TV

NICKELODEON-NET
QTV 11
RJTV
SBN
SOLAR SPORTS-NET
SOLAR TV (RPN)
STAR WORLD
STUDIO 23

Republic of South Africa

Africa Magic
BBC Entertainment
BBC Lifestyle
Boomerang
Cartoon Network
E! Ent
e-TV
KykNET
Magic World
M-Net
M-Net Action
M-Net Movies1
M-Net Movies2
M-Net Series
M-Net Stars
Nickelodeon
SABC1
SABC2
SABC3
Sony Entertainment
Style Network
Universal Channel
Vuzu
Africa Magic +
Animax
BBC World
Channel O
CNN
Crime & Investigation
CSN
Discovery

E News
MK
MTV
MTV Base
National Geographic
Soweto
SuperSport 1/2/3/4/6/7

Russia

2X2
DTV
MTV
MUZ TV
NTV
PERVY KANAL
REN TV
ROSSIYA 1
ROSSIYA 2
STS
TNT
TV TSENTR
TV-3
7TV
DOMASHNY
PYATY KANAL
ZVEZDA

Appendix 2: Print Titles Monitored

China

Children Fun—Kaku Cartoon
Blue cat global adventure
Mickey mouse
Garden Baby
Children Fun—Barbie

India

Ambiliammavan
Ambuliamama
Anandamela
Balahumi
Balarama
Balhans
Champak
Chandamama
Chandoba
GoKulam
GoAdventurer
Jahnamamu
Nandan
Suktatra

Philippines

Playhouse Disney
Disney High School Musical
Disney Princess
K-Zone

Republic of South Africa

Barbie Magazine
Boyz
Bratz Magazine
Camp Rock
Disney and Me
Disney High School Musical
Envirokids
Foschini Kids SuperClub Magazine
Hannah Montana
Hoezit!
MiniMag
National Geographic Kids
Noddy Magazine
Play On
Playhouse Disney
Primary News: Durban
Princess
Princes

In Mexico, Accenture gathered the full lists of printed publications where ICBA members published commercial communications in the period 1 April – 30 June. Below is a list of those titles. This list does not contain any children's titles.

Mexico 2010 ICBA Members Print Title List		
15 A 20	EXCELSIOR	OK!
AUTOMOVIL	EXPRESS MAS NOT MTY.	PADRES E HIJOS
PANAMERICANO	FAMILIA SALUDABLE	PUBLIMETRO
BALANCE	GENTE Y LA ACTUALIDAD	QUIEN
BUENHOGAR	GLAMOUR MEXICO	QUO
CARAS	GQ MEXICO	RECORD DIARIO DEPORT
CHILANGO	IN STYLE MAGAZINE	REFORMA
CINE PREMIERE	INFASHION	SELECCIONES
CINEMANIA	KENA	SPORT LIFE
COCINA FACIL	KENA ESPECIAL	TENDENCIAS
CONOZCA MAS	LA JORNADA	TU
COSMOPOLITAN DE MEXICO	LA PRENSA	TV NOTAS
EL GRAFICO	MARIE CLAIRE	TV Y NOVELAS
EL INFORMADOR JAL	MEN'S HEALTH EN ESPANOL	VANIDADES
EL NORTE MTY.	MI BEBE Y YO	VANIDADES ESPECIAL
EL OCCIDENTAL JAL	MILENIO DIARIO MTY	VEINTITANTOS
EL UNIVERSAL	MURAL JAL.	VOGUE MEXICO
ELLE	MUY INTERESANTE	WOMEN'S HEALTH EN ESPANOL
ERES	NATIONAL GEOGRAPHIC EN ES	
ESQUIRE	NUEVA	
ESTO		

Appendix 3: Websites Monitored

India

www.cartoonnetworkindia.com
<http://www.pogo.tv/>
<http://www.disney.in>
<http://www.hungamatv.com>
<http://kids.discovery.com>
<http://www.nickindia.com/games>
<http://kids.yahoo.com>
<http://kids.zapak.com>
<http://www.pitara.com>
<http://www.hindukids.org/>
<http://thekidzpage.com>
<http://kidsfront.com>
<http://playkidsgames.com>
<http://kidsone.in>
<http://www.123peppy.com>
<http://primarygames.com>
<http://www.kidzworld.com/>
<http://gamekidgame.com/>
<http://www.kidsworldindia.com>

Mexico

<http://home.disneylatino.com/>
<http://www.cartoonnetwork.com.mx>
<http://www.juegos.com/>
<http://www.gusanito.com>
<http://www.papalote.mx/>
<http://www.elkiosco.gob.mx>
<http://www.kokone.com.mx>
<http://www.mundonick.com>
<http://www.kokone.org>
<http://www.pipoclub.com/>
<http://www.dinosaurio.com/>

Republic of South Africa

<http://kids.nationalgeographic.com/kids/>
<http://www.moshimonsters.com>
<http://www.miniclip.com/games/en>
<http://www.nick.com/>
<http://www.sterkinekor.com/site.php>
<http://www.gsn.com/>
<http://www.neopets.com>
<http://www.cartoonnetwork.com/>
<http://spongebob.nick.com>

Russia

www.deti.mail.ru
www.children.kulichki.net
www.solnet.ee
www.detstvo.ru
www.littlefox.ru
www.tvoyrebenok.ru
www.raskraska.com
www.lukoshko.net
www.babylessons.ru
www.mashamedved.tv
www.detskiy-mir.net
www.lizmult.ru
www.prozagadki.ru
www.detiseti.ru
www.danilka.com
www.agakids.ru
www.detsad-kitty.ru
www.olesya--emelyanova.narod.ru
www.rebenok.com
www.pochemu4ka.ru