

# The impact of control measures on television advertising Comparative international study

Workshop of January 19, 2005



# Introduction

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# Agenda (1)

- **Presentation of the study (Koan / Carat)**
  - ▶ Objectives, Scope of application, Implementation
- **Legal Part (Koan)**
  - ▶ Applicable European framework
  - ▶ Comparison with the legal framework of candidate countries and other countries
- *Question time / Coffee break*
  
- **Economic Part (Carat)**
  - ▶ Configuration and structure of the information
  - ▶ Tools and methodology
  - ▶ Broadcasting scene of studied countries – Key facts
  - ▶ Focus on the Product Placement – USA
- *Question time / Break*

# Agenda (2)

- **Comparison of legal and economic data (Koan / Carat)**
  - Interactive session
  - Question time
- Presentation and delivery of the questionnaire
- *Closing*

# Presentation of the study

1. Objective
2. Scope of application
3. Schedule

# 1. Objective

## ■ STUDY OBJECTIVE

- ▶ Measure of the impact of the regulation on the television advertising markets
- ▶ Legal analysis/ Economic and financial analysis of the markets (Carat/ Koan)
- ▶ Measure of the regulation's impact on:
  - ▶ Television advertising
  - ▶ Sponsoring
  - ▶ Teleshopping
  - ▶ Other forms of commercial communications
- ▶ Orientations on the adoption of other provisions

## ■ STUDY CONTEXT

*Presentation of the study*

# 1. Objective

## ■ CALL FOR TENDER

- ▶ Launching of the call for tender: June 2003
- ▶ Year of reference = 2002
- ▶ Starting of the study: January 2004
- ▶ Year of reference for the study: 2002 + 2003

## ■ THE STUDY IN PROGRESS = 4

Stage A : Legal analysis (34 countries)



Stage B : Economic analysis (18 countries)



Stage C : Comparison between the legal and the economic data  
(3 test countries) - **Workshop**



Stage D : Comparison between the legal and the economic data  
(18 countries)

*Presentation of the study*

# 1. Objective

- **Stage A :**
  - ▶ Legal study
  - ▶ Regulation analysis Country/ Country (// TVWF Dir )
    - ▶ For the UE, EEA and the applicant countries :
      - ▶ Identification of the more restrictive rules
      - the more precise rules
    - ▶ For the third countries :
      - ▶ Identification of the more restrictive rules
      - the less restrictive rules
      - the equivalent rules

*Presentation of the study*

# 1. Objective

- Stage B
  - ▶ Economical data :
    - ▶ To deliver necessary « economical » indicators useful to achieve the general objectives = the measurement of the impact of the TVSF measures and visible variances versus markets *in and out* of EU area
    - ▶ Conditions :
      - ▶ Reliability
      - ▶ Representativity
      - ▶ Relevancy
    - ... *of the data used*
    - ▶ Historical context : entry of new members
    - ▶ Non-european markets as benchmarks

*Presentation of the study*

## 2. Fields of application

### Fields of the TVWF

- Related to...
  - ▶ Broadcast activities
  - ▶ Advertising presence in terms of frequency and volume
  - ▶ Advertising formats used
  - ▶ Remuneration
  - ▶ Specific products & Targets
  - ▶ Programmes genres
  - ▶ (Content of advertising messages)



### Economic parts

- Impact measurement
  - ▶ Landscape description
  - ▶ TV broadcast computation
  - ▶ Spots identification & registration
  - ▶ Revenues generated
  - ▶ All indicators - transversal subject
  - ▶ Broadcast computation and schedule description
  - ▶ (No economic indicators)

*Presentation of the study*

### 3. Schedule of the survey

	J '04	F '04	M '04	A '04	M '04	J '04	J '04	A '04	S '04	O '04	N '04	D '04	J '05	F '05	M '05
Legal analysis for 36 markets	Phase A													*	*
Intemetary economical analysis Focus on 3 markets															
Extension to 15 other markets															
Matching legal and economical data and analysis															
Workshop & questionnaire													X		
Feed back and Final reports													Phase D - report 5		

*Presentation of the study*



## Legal Aspects

Applicable European framework

Comparison with the legal framework of applicant countries and third countries

# Introduction



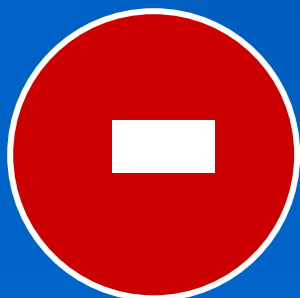
# Symbols used



more restrictive  
or more detailed



in line with directive



less restrictive

# Territorial field of the study in 2002-2003



## Member States + EEA

- Austria
- Belgium
- Denmark
- Finland
- France
- Germany
- Greece
- Ireland
- Italy
- Luxemburg
- Netherlands
- Portugal
- Spain
- Sweden
- UK
- Iceland
- Liechtenstein
- Norway

## Applicant States

- Bulgaria
- Cyprus
- Czech Rep
- Estonia
- Hungary
- Latvia
- Lithuania
- Malta
- Poland
- Romania
- Slovakia
- Slovenia
- Turkey

## Third States

- U S A
- Japan
- Canada



*Legal Part*

# Territorial field of the study today



## Member States + EEA

## Applicant States

## Third States

- Austria
- Belgium
- Cyprus
- Czech Rep
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxemburg
- Malta
- Netherlands
- Poland
- Portugal
- Spain
- Slovakia
- Slovenia
- Sweden
- UK
- Iceland
- Liechtenstein
- Norway

- Bulgaria
- Romania
- Turkey

- U S A
- Japan
- Canada



*Legal Part*



# The TVWF Directive rules relating to advertising

# Agenda

1. Definitions
2. General rules on content
3. Identification and insertion
4. Quantitative restrictions
5. Specific products and targets
6. Sponsoring



# 1. Definitions

(art. 1)

# Television Broadcasting

- ▶ The initial transmission :
  - ▶ by wire or over the air
  - ▶ including that by satellite
  - ▶ In unencoded or encoded form
- ▶ Of television programmes
- ▶ Intended for reception by the public

## Included

Communication between undertakings with a view to their being relayed to the public

## Not Included

Communication services on individual demand

# Television Advertising

- ▶ Any form of announcement
- ▶ Broadcast
  - ▶ whether in return for **payment** or for similar consideration or for **self promotional** purposes by a public or private undertaking
  - ▶ in connection with a trade, business, craft or profession
- ▲ in order to **promote** the supply of goods or services, including immovable property, rights, and obligations in return for payment

# Teleshopping

- ▶ **Direct offers** broadcast to the public
- ▶ With a view to the supply of goods or services
- ▶ In return for **payment**

# National rules

## Definitions

- Member States

- ▶ Greece
- ▶ The Netherlands



Television Broadcasting

Advertising

- Applicants

- ▶ Turkey



Split Screen

- Third States

- ▶ Canada
- ▶ U S A



Definitions Missing

Definitions Missing



## New definitions ?



## 2. General rules on advertising content

(art. 12)





# General Rules in relation to the content of advertising

- Article 12 Directive TVWF:
  - ▶ Basic principles in relation to :
    - ▶ human dignity
    - ▶ non discrimination
    - ▶ respect for religious or political beliefs
    - ▶ health and safety
    - ▶ environment

# General rules in relation to the content



## National rules

### ■ Member States

- ▶ **UK** :  more detailed rules
- ▶ **Norway** :  general rules applicable to all advertising
- ▶ **Spain** :  more detailed rules
- ▶ **Czech republic, Hungary** :  more detailed rules (all media)


# General rules in relation to the content

## National rules

- Candidate countries :
  - Bulgaria/Turkey :
    -  more detailed rules
  
- Third countries :
  - USA : 
    - self-regulation of networks and stations
    - little or no regulation (except for ex. rules in prohibiting misleading advertising)


# General rules in relation to the content

## National rules

- **Japan** : 
  - ▶ detailed regulation
  - ▶ general rules comparable to article 12 Directive TVWF
  - ▶ detailed rules in relation to advertising for specific products and advertising content

# General rules in relation to the content

## National rules

- **Canada** : 
  - ▶ similar rules to art.12 Directive TVWF
  - ▶ general consumer protection regulation prohibits misleading advertising



## 3. Identification and Insertion

(art. 10 & art. 11)

- Advertising and teleshopping
  - ▶ must be **readily recognizable** as such
  - ▶ **isolated** spots shall remain the exception
  - ▶ shall not use **subliminal** techniques

# Identification

## National Rules

### Member States

▶ Sweden



Isolated spots



Presentator of Information/  
Children's programmes

▶ Belgium (French Comm.)



Sound Volume



Identification of Teleshopping

### Applicant States

▶ Bulgaria



Identification of Teleshopping

▶ Turkey



Surreptitious Advertising



Isolated Spots

### Third States

▶ Japan



Identification

▶ USA



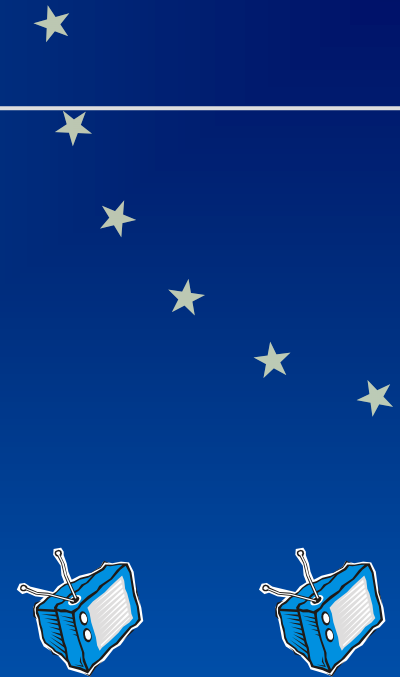
No rules

*Legal Part*

# Identification

## Split Screen

- Member states
  - **Germany**
    - regulated and permitted
  - **France**
    - tolerated in 2 cases
  - **Hungary**
    - tolerated

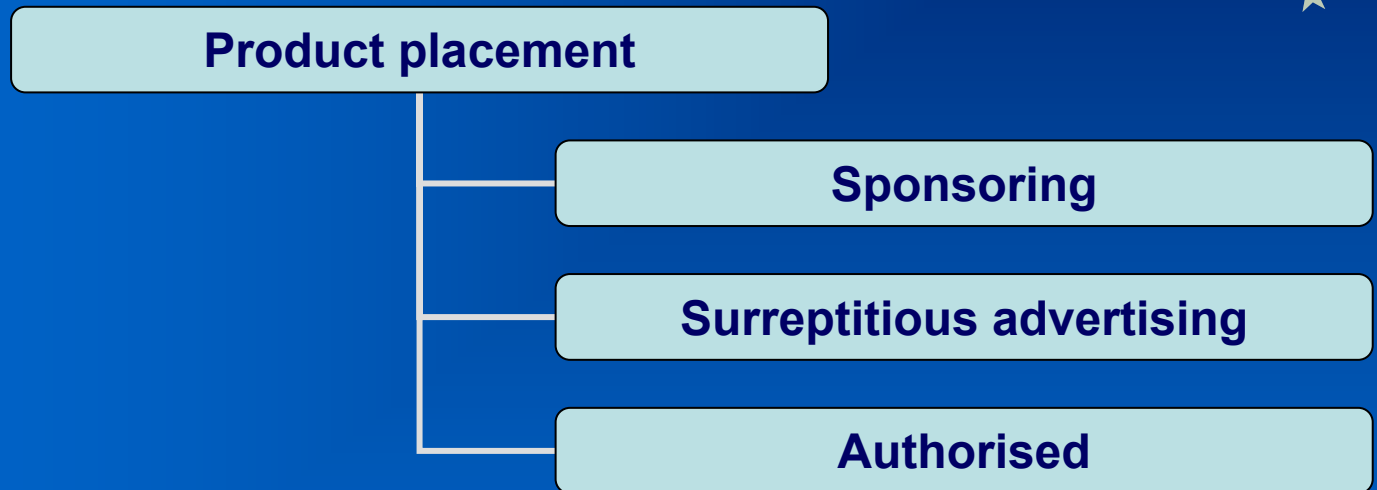


- Surreptitious Advertising and Teleshopping prohibited

# Surreptitious Advertising

- Representation in words or pictures of ...
  - ▶ Goods
  - ▶ Services
  - ▶ Name
  - ▶ Trade mark
  - ▶ Activities
  
- ▶ ... Of a producer of goods or a provider of services in programmes when :
  - ▶ such representation is **intended**
  - ▶ to serve **advertising**
  - ▶ and might **mislead** the public as to its nature

# Surreptitious Advertising & Product Placement



*Legal Part*

The impact of control measures on television advertising

# Product placement

## National Rules

- Member States

- UK



Undue prominence

- Applicant States

- Bulgaria



Surreptitious advertising

- Third States

- USA



No rules

*Legal Part*

# Insertion – General Rules

(art. 11 § 1)

- Insertions **between** programmes
- Insertions **during** programmes under conditions :
  - Fulfillment of conditions set out in
  - Paragraphes 2- 5

And

- Respect of **Integrity And Value** of the programme

*Legal Part*

# Insertion - Specific Rules

## (art. 11 § 2) - Programmes consisting of Autonomous Parts

- Field of application
  - Programmes consisting of autonomous parts
- The rule
  - Insertion during programmes only **between** autonomous parts

And

- Sports programmes events and performances similarly structured containing intervals

*Legal Part*

# Insertion - Specific Rules (art. 11 § 3) - Audiovisual works

- Field of application : audiovisual works
  - ▶ Example : feature films, films made for television
  
- Are excluded :
  - ▶ Series
  - ▶ Serials
  - ▶ Light entertainment programmes
  - ▶ Documentaries

Case 1



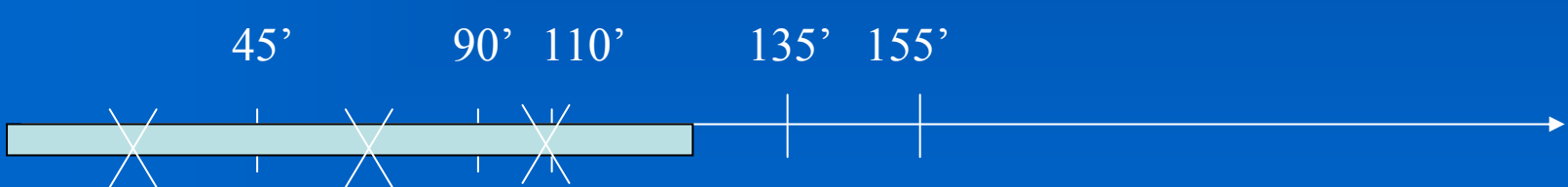
Case 2



Case 3



Case 4



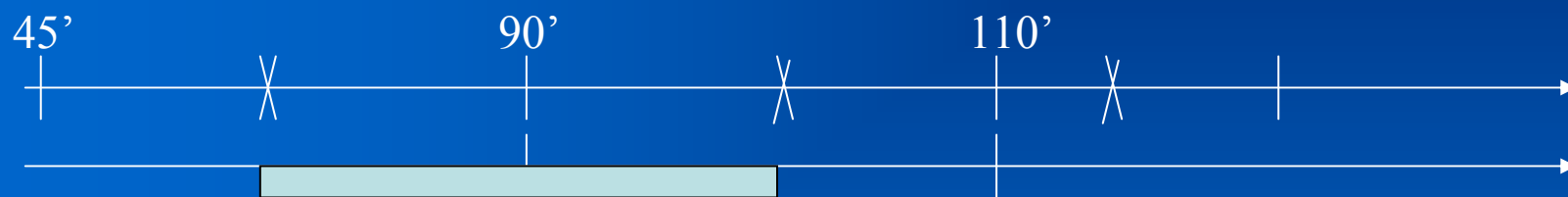
Legal Part

# Insertion - Specific Rules

(art. 11 § 4) - Intervals between interruptions



## ■ 20 MINUTES



# Insertion - Specific Rules (art. 11 § 5) - Prohibitions



# Insertion

## National Rules

### Member States

- ▶ France
- ▶ Czech Republic



Audiovisual works  
20 minutes rules

### Applicant States

- ▶ Turkey
- ▶ Romania
- ▶ Bulgaria



20 minutes rules  
Audiovisual works  
Children's programmes  
Specific prohibitions

### Third States

- ▶ Canada
- ▶ U S A



No regulation  
No regulation

*Legal Part*



## 4. Quantitative restrictions

(art. 18 & art. 18 bis)

# Quantitative restrictions



Volume / day		Volume / hour	Teleshopping
<ul style="list-style-type: none"> <li>▪ Teleshopping spots</li> <li>▪ Advertising spots</li> <li>▪ « other forms of advertising »</li> </ul>	<ul style="list-style-type: none"> <li>▪ Advertising spots</li> </ul>	<ul style="list-style-type: none"> <li>▪ Teleshopping spots</li> <li>▪ Advertising spots</li> </ul>	<ul style="list-style-type: none"> <li>▪ Teleshopping windows (min. 15 min.)</li> </ul>
<ul style="list-style-type: none"> <li>▸ 20% daily transmission time</li> </ul>	<ul style="list-style-type: none"> <li>▸ 15% daily transmission time</li> </ul>	<ul style="list-style-type: none"> <li>▸ 20% per clock hour</li> </ul>	<ul style="list-style-type: none"> <li>▸ 3 hours a day max. 8 windows per day</li> </ul>

Legal Part

# Quantitative restrictions

## Art. 18

### Member States

▶ Italy



Maximum 18% per  
clock hour + 2%

▶ Belgium  
(Flemish community)



Maximum 15% per day  
teleshopping spots included

▶ France



Sliding hour

### Applicant States

▶ Romania



▶ Bulgaria



Maximum 15% per day  
teleshopping spots included

### Third States

▶ U S A



No restriction except for children's  
programmes

*Legal Part*

# Quantitative restrictions

## Art. 18 bis

### Member States

▶ Denmark



No minimum duration of window  
Maximum 1 hour included in the  
15% of advertising time

▶ Normay



Maximum 1 hour included in the  
15% of advertising time

▶ Sweden



No rules

### Applicant States

▶ Romania



▶ Turkey



Maximum 1 hour a day

### Third States

▶ USA



No rules

*Legal Part*



## 5. Specific products and targets

# 1. Tobacco

- Article 13 Directive TVWF :
  - television advertising and teleshopping prohibition
- Article 17,2 Directive TVWF :
  - sponsoring prohibition

# Tobacco



## National rules

- Member states :
- All members states have implemented the prohibition
  - ▶ Denmark :  also tobacco accessories
  - ▶ Poland :  also tobacco accessories and products imitating tobacco products
- Candidate states :
  - ▶ Prohibition :  Turkey, Bulgaria

*Legal Part*


# Tobacco

## Third countries

- Canada :  prohibition
- USA : 
  - ▶ TV advertising for cigarettes and most tobacco products is prohibited
  - ▶ Self-regulation: cigars, pipes...
  - ▶ Master Settlement Agreement: no product placement

# Tobacco

## Third countries (continued)





- Japan : 
  - ▶ no legal prohibition for TV advertising
  - ▶ general rule : minors who are smoking or drinking cannot be depicted in a favourable way
  - ▶ self-regulation adopted by the Tobacco Institute

## 2. Alcohol

- Article 15 Directive TVWF
- TV advertising and teleshopping is permitted under conditions

# Alcohol National Rules

## Member States :

- ▶ Finland :  prohibition beverages containing more than 22%
- ▶ France :  prohibition beverages containing more than 1,2%
- ▶ Poland :  total prohibition, exception for beer
- ▶ Hongaria, Lithuania :  prohibitions during certain hours

# Alcohol

## National rules continued

- Candidate countries :

- ▶ Turkey :  total prohibition

- Third countries :

- ▶ Canada :  TV more detailed conditions

- ▶ USA : 

- ▶ no regulation

- ▶ self-regulation for 3 categories (beer, wine, spirits)

- ▶ Spirits : self imposed ban

- ▶ Japan : 

- ▶ no regulation – self-regulation (protection of minors)




### 3. Medicines

- Article 14 Directive TVWF :
  - ▶ Tv advertising for medicines only on prescription is prohibited
  - ▶ Teleshopping for medicines subject to marketing authorization is prohibited
  
- Article 17,3 :
  - ▶ sponsorship may not promote medicines only on prescription

# Medicines

## National rules

### ■ Member States :

- ▶ France, Finland :  detailed rules in relation to the content of advertising
- ▶ France, Germany :  more detailed rules in relation to the categories of medicines that can be advertised
- ▶ Norway :  total ban

# Medicines

## National rules (continued)

- Candidate countries :

- ▶ Turkey :  no sponsorship for the promotion of medicines

- Third countries :


- ▶ USA : 

- ▶ medicines can be advertised even if available only on prescription
- ▶ advertising for medicines on prescription: condition in relation to information and warnings to the public
- ▶ Network Guidelines (self-regulation)

- ▶ Japan : 

- ▶ advertising for medicines is permitted
- ▶ no distinction OTC/ on prescription
- ▶ specific rules in relation to the content of advertising (information to the public)

*Legal Part*

- **Canada** : 
  - ▶ advertising for medicines is permitted
  - ▶ no distinction OTC/on prescription
  - ▶ conditions in relation to content and visa of the Minister

- Article 16 Directive TVWF :
  - ▶ Tv advertising shall not cause moral or physical detriment to minors
  - ▶ Conditions : protection of minors
  
- Article 11,5 :
  - ▶ Advertising/teleshopping shall not be inserted in children's programmes with a duration of less than 30 minutes

# Minors

## National rules

### Member States :

#### ▶ UK :

- ▶ specific detailed rules on advertising directed towards children (15 and under)
- ▶ Certain products cannot be advertised in or around children's programmes depending on the age of the audience
- ▶ Before 9pm : no advertising addressed to children with persons or characters appearing in children's programmes

#### ▶ Greece :

- ▶ advertising for toys is prohibited between 7 and 22h

#### ▶ Sweden :

- ▶ total ban concerning children under 12 years

#### ▶ Germany :

- ▶ more detailed rules and a prohibition to interrupt children's programmes

#### ▶ Poland :

- ▶ prohibition to interrupt children's programmes

*Legal Part*

# Minors

## National rules

- Candidate states :

- Turkey/Bulgaria : 

- More detailed rules concerning the content of advertising


- Third countries :

- USA : 


- Regulation :

- Children's programmes: produced and broadcast primarily for an audience of 12 years and younger
      - Weekends : maximum 10,5 minutes/hour
      - Weekdays : maximum 12 minutes
      - Selfregulation (CARU)

# Minors (continued)

- Japan : 
  - ▶ Educational programmes intended for schools cannot contain advertising
  - ▶ Advertising cannot stimulate children's desire to obtain a certain product in an exaggerate way

# Minors (continued)

- Canada : 
  - ▶ Code for TV advertising addressed to children (self regulation)
  - ▶ Consumer protection law of Québec :
    - ▶ prohibition to address advertising to children under 13 years

## 6. Sponsorship



- Legal definition, article 1 Directive TVWF :
  - ▶ contribution by a public or private undertaking
  - ▶ to the financing of television programmes
  - ▶ promoting its name, its trademark, its image, activities or products

- Article 17 Directive TVWF :
  - ▶ Sponsored television programmes :
    - ▶ content and scheduling: not influenced by the sponsor
    - ▶ identified as such by the name and/or logo of the sponsor at the beginning and/or the end
    - ▶ no promotion of the products or services of the sponsor
    - ▶ news and current affairs programmes may not be sponsored

# Sponsorship

## National rules

- Rules in relation to the insertion of the message :
  - ▶ Breakbumper (Portugal, Sweden, Germany, UK, Ireland, Belgium ...)
  - ▶ Insertion into trailers (Germany, Poland, Belgium...)
  - ▶ Mention during the programme (France)

# Sponsorship

## National rules

- Duration of the message :
  - Maximum duration of the sponsoring message (UK, Belgium, Ireland, Germany, Turkey, Poland)
  
- Content of the message :
  - Rules in relation to the use of a slogan, moving images, etc (UK, Ireland, Germany)
  
- Other :
  - Sponsoring including provision of products to be used in the Tv programme : accepted in most countries provided no undue prominence is given to the products

# Sponsorship

## National rules

- Third countries :
  - USA :
    - no regulation on TV sponsorship
    - legal restrictions concern certain sponsors (tobacco, political campaigns)
    - Network guidelines: obligation to identify a sponsor or to mention the name of a product/service
    - product placement is permitted (information to the public) :
      - free gift of products/services; promotion
      - showing/promotion of products against payment
      - advertiser provided programmes

# Sponsorship

## National rules

- Japan :
  - ▶ no specific regulation
  - ▶ 6 months contract/message at the end of programme
  - ▶ product placement is permitted and used
  
- Canada :
  - ▶ no specific rules
  - ▶ considered as advertising
  - ▶ agreements to sponsor an entire evening
  - ▶ product placement is not forbidden but not frequently used

# The impact of control measures on television advertising

Question time

Coffee break

# Economic part - Carat

1. Parameters and structure of the information
2. Tools & methodologies, Particularities
3. Audiovisual landscapes studied

# 1. Structure of the information

## Channels and audiences

*The general approach = the points of the Directive per market*

### ■ Identification of each channel ...

- ▶ ... legal obligations status and national laws
- ▶ ... technologies used each TV channel
- ▶ ... service offers versus technique(s) used
- ▶ ... channels position National Coverage, “Local”, Non-Domestic, International + Others

### ■ Viewing habits

- ▶ **Television audiences per time slot**
  - ▶ “Rating” (%) = “*average audience in a defined period of time*”
  - ▶ **Total day** and **prime time** = national definitions of time slots
- ▶ **Two specific groups of viewers = Adults and Kids**

### ■ Audience shares

- ▶ The market share of the channels - audience based
- ▶ Per position

# 1. Structure of the information

## Advertising parameters

- **Advertising indicators**
  - ▶ Notions of "spots", "blocks", "breaks", units and seconds
    - ▶ All day / prime time
- **Notion of programmes interruption by Advertising Breaks**
  - ▶ Based on a schedule of a **typical week**
  - ▶ **Representative** of the concerned channels
  - ▶ Method :
    - ▶ # programmes interrupted, % of adv. breaks "**inside**"
    - ▶ avg # of minutes **between** breaks "in" / per programme type
- **Advertising investments monitoring**
  - ▶ Base : Official rates / "Gross space value"

= The advertising "**weight**" (or pressure)  $\neq$  financial flow

  - ▶ Total advertising investments in TV versus total media
  - ▶ Advertising investments of the major channels vs total TV

# 1. Structure of the information

## Advertising formats

### Advertising

- ▶ Advertising Spots
- ▶ Advertising Spots linked with sponsoring
- ▶ Split screen
- ▶ Public Interest messages and charity appeals
- ▶ *Isolated Spot*
- ▶ *Insert or Product Placement*
- ▶ *Verbal reference*



### Per formats :

- ❑ channel and time slot, Amounts of insertions
- ❑ Share of investments
- ❑ Time share (real / theoretical)
- ❑ Avg broadcast minutes (by channel in an hour)

### Sponsoring

- ▶ Sponsoring / Billboard Spots
- ▶ Break Bumper
- ▶ Sponsored Self-Promotion Spots (trailers)
- ▶ Infomercial / programming
- ▶ Bartering
- ▶ *Virtual Advertising*
- ▶ *Injection / pop up's*
- ▶ *Scoreboards / "chronowatches"*

### Teleshopping

- ▶ Teleshopping Spots
- ▶ DRTV

# 1. Structure of the information

## Advertising versus Programmes

- Typology of programmes in the eye of the Directive
  - ▶ **Standard segmentations**
    - ▶ Children, educational programmes, cartoons
    - ▶ Documentary
    - ▶ Film, TV Films and Mini Series
    - ▶ Series and Soaps
    - ▶ Information - News, Flash, info magazines
    - ▶ Tele Shopping programmes
    - ▶ ...
  - ▶ **Advertising as a “programme type”**
  - ▶ Distinction between advertising and self-promotion
  - ▶ **Advertising in its context**
    - ▶ The proportion time of advertising by programme type – index based
    - ▶ Amounts of spots / Investments per programme type

# 1. Structure of the information

## Specific products

- **Per sector** : inserts, advertising duration and investments
  - ▶ Non Prescription Medical Products
  - ▶ Tobacco
  - ▶ Alcohol
    - ▶ Beer
    - ▶ Wine and Champaign
    - ▶ Spirits - Aperitifs , Liquor, Whisky...
  - ▶ Cleaning Products
  - ▶ Cosmetics and Personal Hygiene
  - ▶ Products or services targeting minors
- Upon **national** segmentations
- **By channels**
- **Redundancies**
  - ▶ Share by sector

*economic part - Carat*

## 2. Tools & Methodology, Particularities

### Countries taken into account / Notions of clusters

#### Member States / New entrants

- Austria
- Belgium N/S
- **Czech Republic**
- France
- Germany
- **Hungary**
- Ireland
- Italy
- Netherlands
- **Poland**
- Spain
- Sweden
- United Kingdom

#### Applicant States

- Romania
- Turkey

#### Third States

- USA
- Japan
- Canada

#### ▪ Representativity

- ▶ Necessity to **select** markets
- ▶ Sufficient for trends **analysis** and **pictures**

#### ▪ Notion of clusters

- ▶ Economic groups of countries  
**3 clusters + 1 Global**
- ▶ Function of the **indicators**
- ▶ Allowing relevant **benchmarks**

*economic part - Carat*

## 2. Tools & Methodology, Particularities

### Official operational data and standard definitions

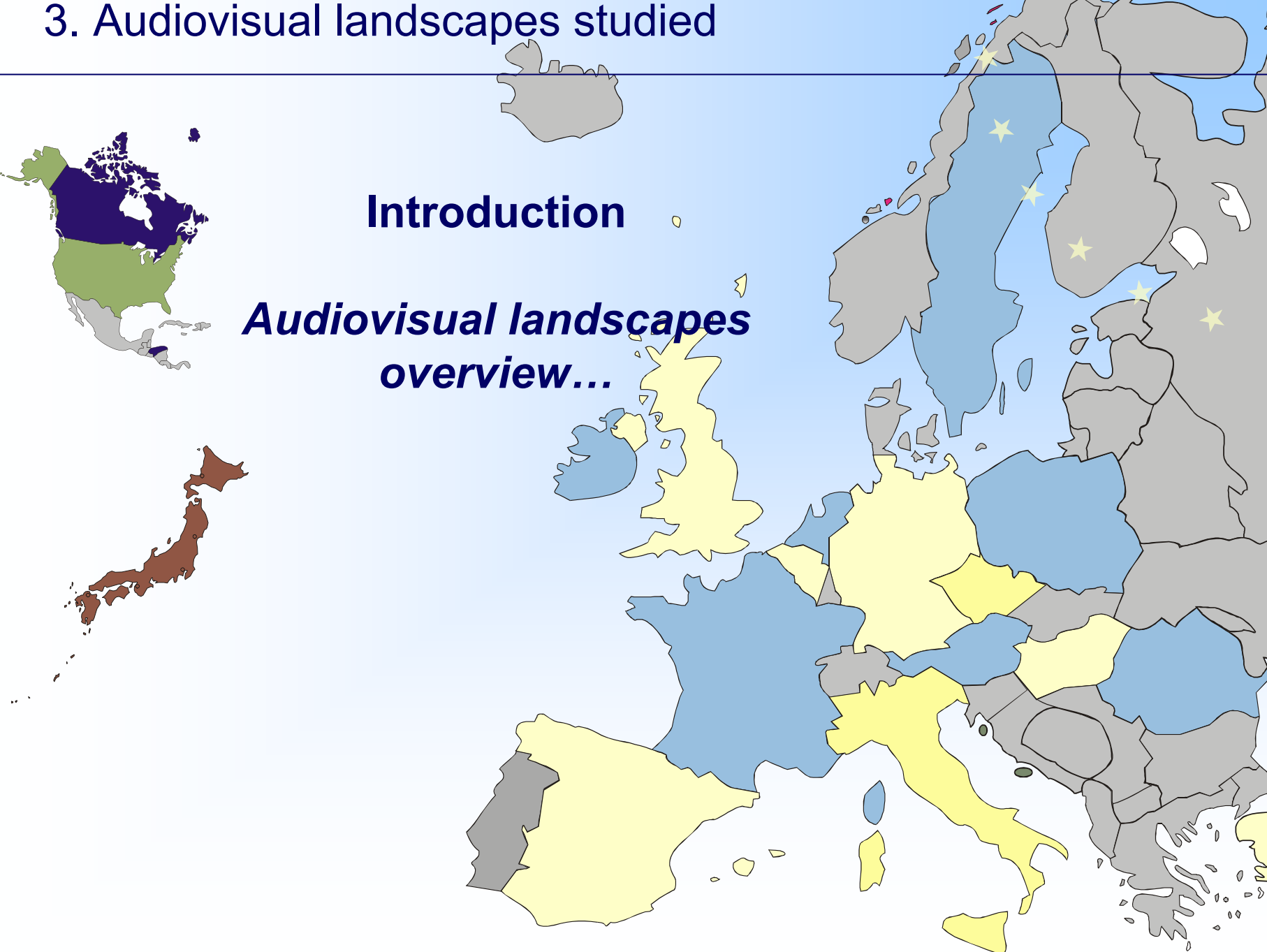
	Austria	Belgium N	Belgium S	Canada (Engl)	Canada (French)	Czech Republic	France	Germany	Hungary	Irelande	Italy	Japan	Netherlands	Poland	Romania	Spain	Japan	Canada (French)	Canada (Engl)	USA
Adults definition	15+	15+	15+	18+	18+	15+	15+	14+	18+	15+	15+	20+	13+	16+	18+	16+	20+	18+	18+	18+
Universes (000 000)	6,5	4,9	3,4	19,2	5,1	8,5	45,7	63,0	7,8	3,0	49,5	84,8	13,3	30,5	16,2	34,6	84,8	5,1	19,2	211,4
Prime Time Definition	19:00-23:00	18:55-23:00	18:55-22:30	19:00-23:00	19:00-23:00	19:00-22:00	20:00-22:00	20:00-23:00	18:30-21:29	18:00-23:29	21:00-23:00	19:00-23:00	20:00-22:29	19:00-21:59	19:00-23:00	20:30-24:00	19:00-23:00	19:00-23:00	19:00-23:00	M-S 20:00-22:59 Su 19:00-22:59
Sources	FocusMR Teletest	Audimétrie CIM TV Times MDB	Audimétrie CIM TV Times MDB	BBM Surveys	BBM Surveys	ATO Mediaresearch TNS A-Connect	Médiamétrie Secodip	AGF/GfK Fernsehorschung Nielsen Media Research / Pinball	AGB Hungary Mediagnozis	Nielsen Media Research / AC Nielsen Invest : IAPI, RTE and Carat est	AGB / Nielsen Auditel / MTVS	Video Research INEX NNN Station	OVS SKO/TV TIMES	AGB Polska	TNS AGB International	Sofres Infoadex	Video Research INEX NNN Station	BBM Surveys	BBM Surveys	Nielsen Monitor Plus

economic part - Carat

## 2. Tools & Methodology, **Particularities**

- **Audiovisual indicators** : notions of ...
  - ▶ *Audiences / shares / ratings*
  - ▶ *Universes / case of the kids definition(s)*
  - ▶ *Prime time slots*
  - ▶ *Local selection of broadcasters*
  - ▶ *Extrapolation of audiences*
  - ▶ *Media investments trackings*
  - ▶ *Segmentation of programmes and product categories*
  - ▶ *Gathering of the advertising campaigns identifiers*
  - ▶ *Sources*
- See the economic **reports** and the methodology **note**

### 3. Audiovisual landscapes studied



# Structural Drivers to the Power of TV Advertising

## This Is True Everywhere...

---

- Television is **the most spread and used media**
- Television is **the least fragmented media**
- Television offers **“all senses” to spot creation**
- Television **measurement is seen as the most accurate**

*Economical part - Carat*

# Structural Influences to TV Advertising

## To Understand Markets' Size and Structure

- It's the economy!
  - ▶ GDP etc.
- The number of **TV channels with national coverage**:
  - ▶ Mostly channels with coverage above 70% will fit into national media plans,
  - ▶ 2/3 of European viewers access 4-6 channels,
  - ▶ In each market a handful of channels attract 60-90% of the whole viewing,
  - ▶ This compares with hundreds of print titles, radio stations or web sites.
- The number of **national channels to carry advertising**:
  - ▶ Some public channels will carry little-or-no advertising (BBC...),
  - ▶ Some public channels are dominant in their advertising market (TVP...),
  - ▶ Some premium pay channels enjoy a national terrestrial license (C+).
- The **level of competition** between sales rep./ media owners:
  - ▶ 3-4 significant TV groups per country, sometimes down to "1-2" (Italy...),
  - ▶ Some sales rep. are in a dominant market position (ITV, TF1).

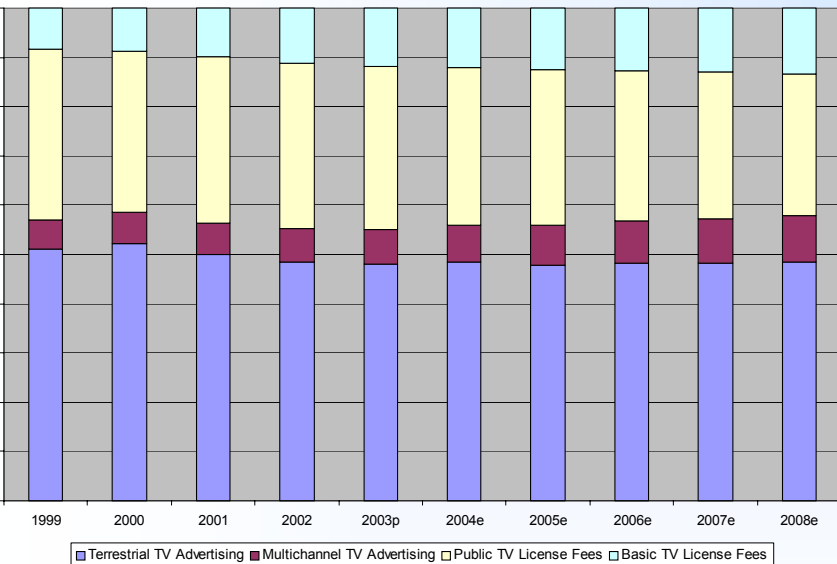
*Economical part - Carat*

# Europe vs. the USA

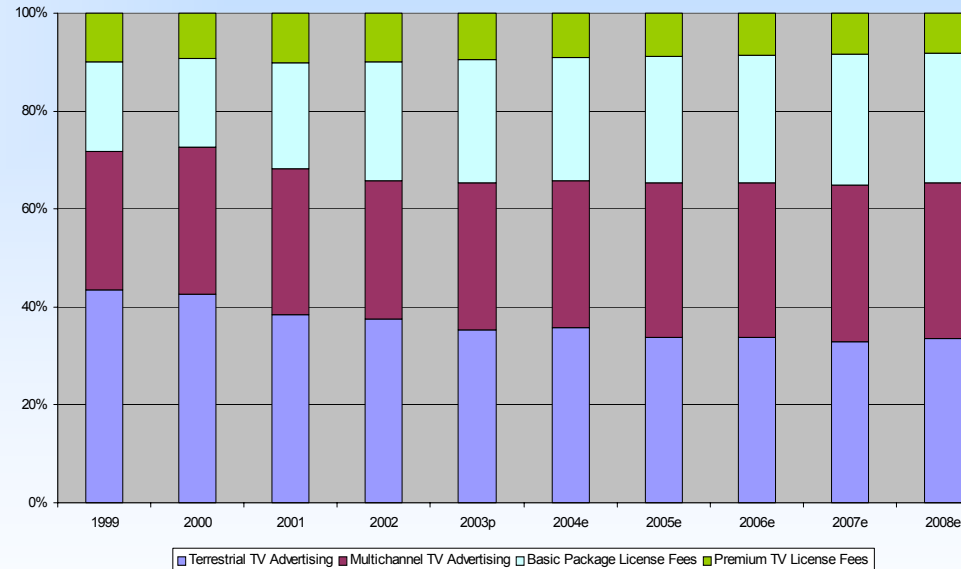
## Origin of Television Revenue

- Terrestrial advertising is relatively more important in Europe compared to the US**, where multichannel television is very dynamic with both advertising investments and fees from cable and DTH providers (*public funding also more important in Europe*).

European TV Network Revenue Split in %



US TV Network Revenue Split in %

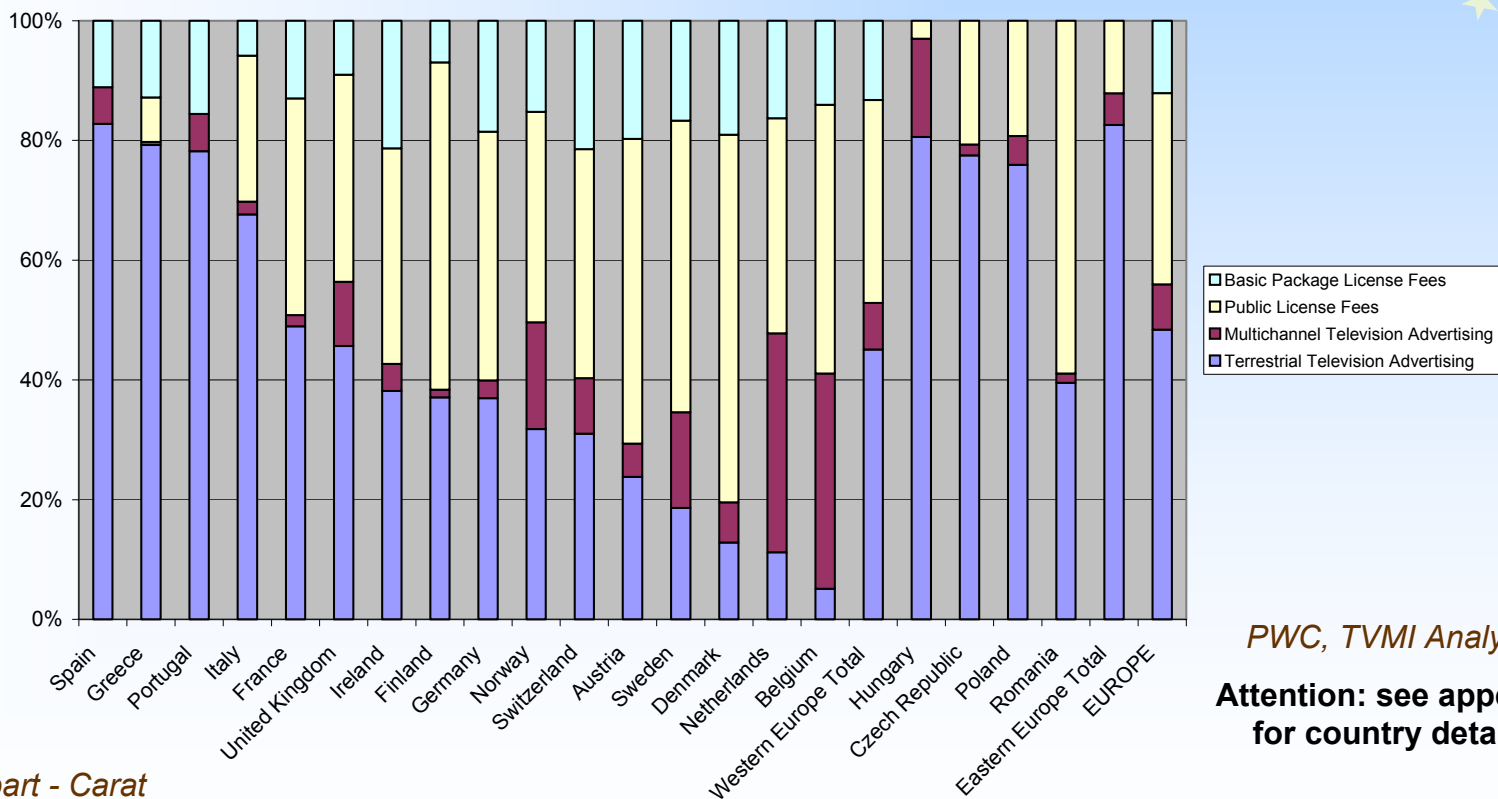


# European Diversity

## Free or Pay, Cable or Satellite

- European TV is funded by advertising first, public fees second, cable and satellite fees third.

European Network Revenue Split in %  
(2004 estimate)



PWC, TVMI Analysis

Attention: see appendix for country details.

Economical part - Carat

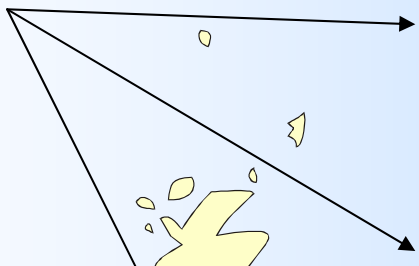
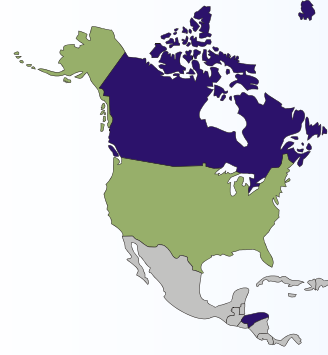
# European Diversity

## Striking Facts

- **An average German viewer receives 40 channels.**
  - ▶ German viewers pay for distribution as part of their local tax at rather low cost,
  - ▶ Channel lineup is very similar across Germany, a basic cable bouquet with theme channels and a wide range of sport and cinema on national channels,
  - ▶ Pay television is now in a better position with Premiere at 3 million customers and digital cable growing,
  - ▶ Most of German TV advertising is captured by RTL and Pro7Sat1 with 4 channels each.
- **Multichannel penetration is below 30% in Southern Europe.**
  - ▶ Pay TV has seen an early and quick development with C+ then DTH (which became profitable recently),
  - ▶ Cable is mainly a pay system from basic services to advanced digital offers,
  - ▶ New technologies are emerging like ADSL or DTT to increase multichannel in 5-8 years.
- **TF1 is nearly 50% of the French advertising market.**
  - ▶ Though France Télévisions earns nearly half of their revenue from advertising and M6 is a significant player,
  - ▶ ITV is similar thanks to the BBC carrying no advertising,
  - ▶ Mediaset is also in a powerful situation in a “duopoly market”.
- **Sky has 8 millions customers in the UK.**
  - ▶ It benefited from no competitor + English language + problems of cable / ITV Digital,
  - ▶ Large success of DTT Freeview (4 million) and launch of Sky’s “Freesat”,
  - ▶ Multichannel advertising should grow while customers continue to pay for advanced services?
- **Public TVP is advertising leader in Poland.**
- **The 5 largest European countries make-up 80% of the advertising TV market.**
- **US advertising market is 80% higher than Europe, with TV more developed.**

*Economical part - Carat*

# European landscape mapping...

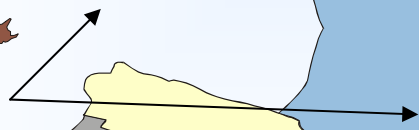
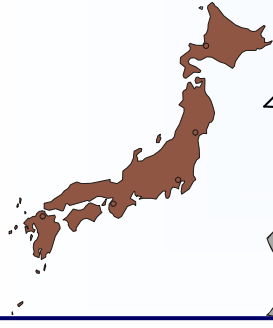


**Nordic**  
 (Denmark, Finland, Norway, Sweden)  
 Limited TV advertising though multichannel reach 2/3 of population, and limited pay TV.

**German-speaking, Benelux**  
 (Austria, Belgium, Germany, Luxembourg, Netherlands, Switzerland)  
 High penetration of cable and freesat with significant multichannel advertising especially in Germany, pay TV is now reaching critical mass.

**Latin/Southern Europe and UK/Ireland**  
 (France, Italy, Spain, Portugal, Greece, Ireland, UK)  
 Public cable was slow leaving multichannel advertising weak and large commercial channels, the UK is more multichannel advertising but channel free BBC, pay TV is developed with the UK/Ireland ahead.

**Central Europe**  
 (Czech Republic, Hungary, Poland, Romania)  
 Half of the homes have multichannel but few networks have national coverage wide enough for advertisers, while pay TV is emerging.



Enders, TVMI Analysis

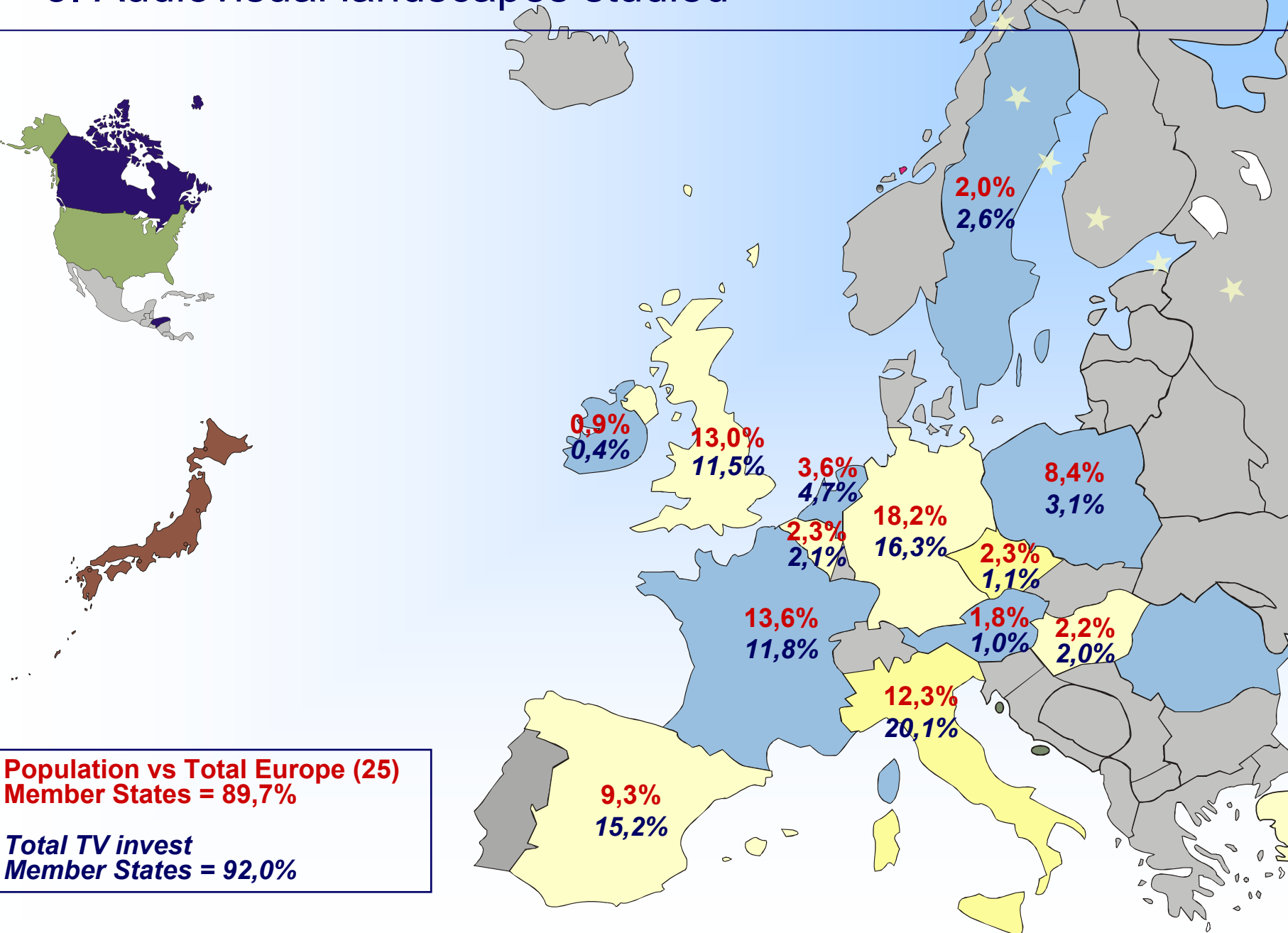
# European Television Conclusions

## Advertising Related Challenges

- **Advertising is what helps finance TV programs:**
  - ▶ The largest share of the profit comes from advertising.
  - ▶ Free TV first window is key to raise funding and start any content.
- **DTWF aims at protecting the viewers:**
  - ▶ From intrusive and/or hidden advertising.
  - ▶ And to ensure editorial independence from advertisers (among others).
- **TV advertising is under potential threat from:**
  - ▶ Multichannel growth increases fragmentation and zapping.
  - ▶ PVR and On-Demand television increases ad-skipping.
- **Programming & editorial issues vs. advertising regulation:**
  - ▶ Are **restricted genres** equally funded (news, children, cinema...)?
  - ▶ Is **overall volume** of advertising airtime enough vs. US players?
  - ▶ When is “**advertising-funded programming**” economically feasible and less or equally intrusive compared to traditional spots and billboards?

*Economical part - Carat*

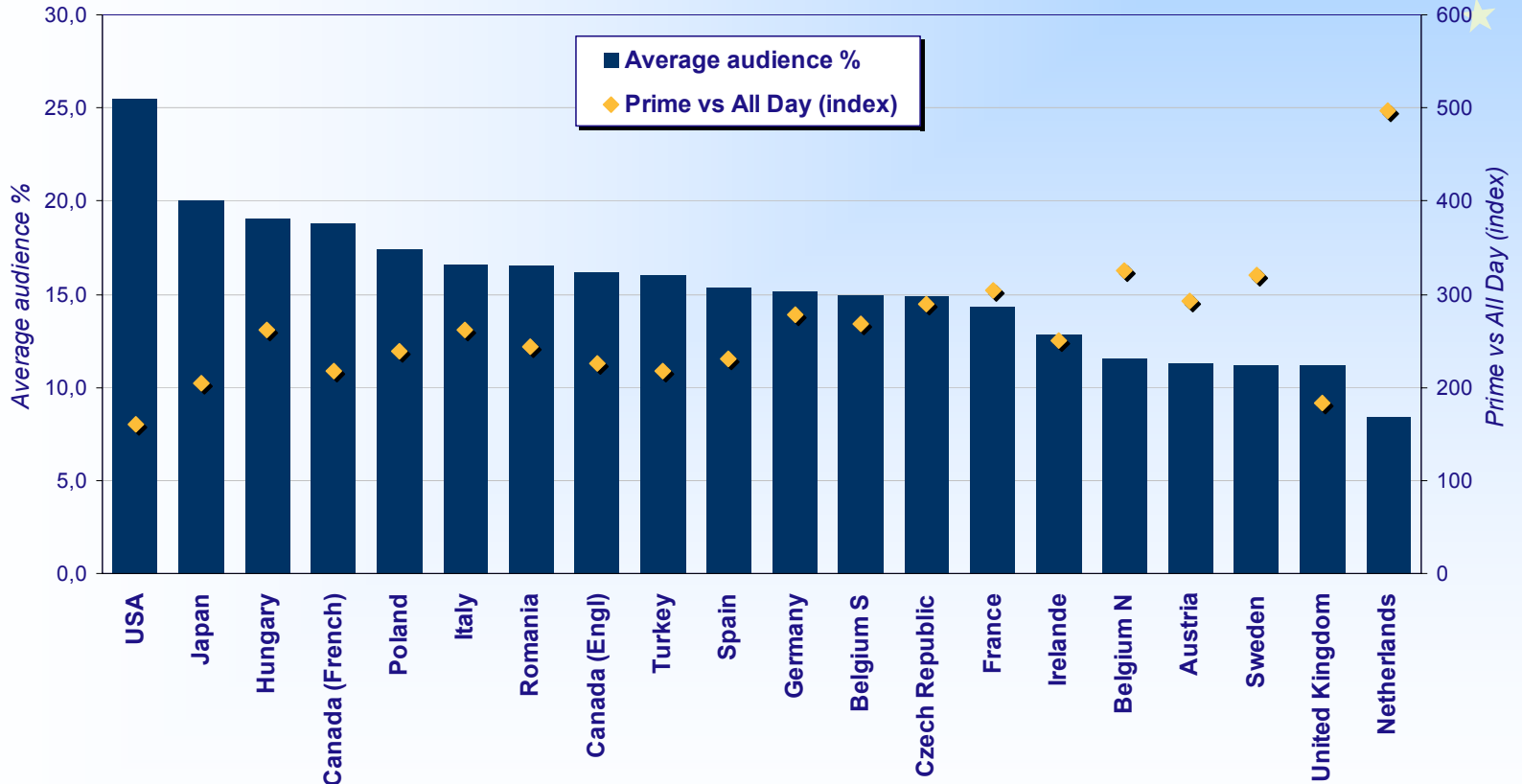
### 3. Audiovisual landscapes studied



# 3. Audiovisual landscapes

- Key Facts : the power of TV

Average Audience in 2003

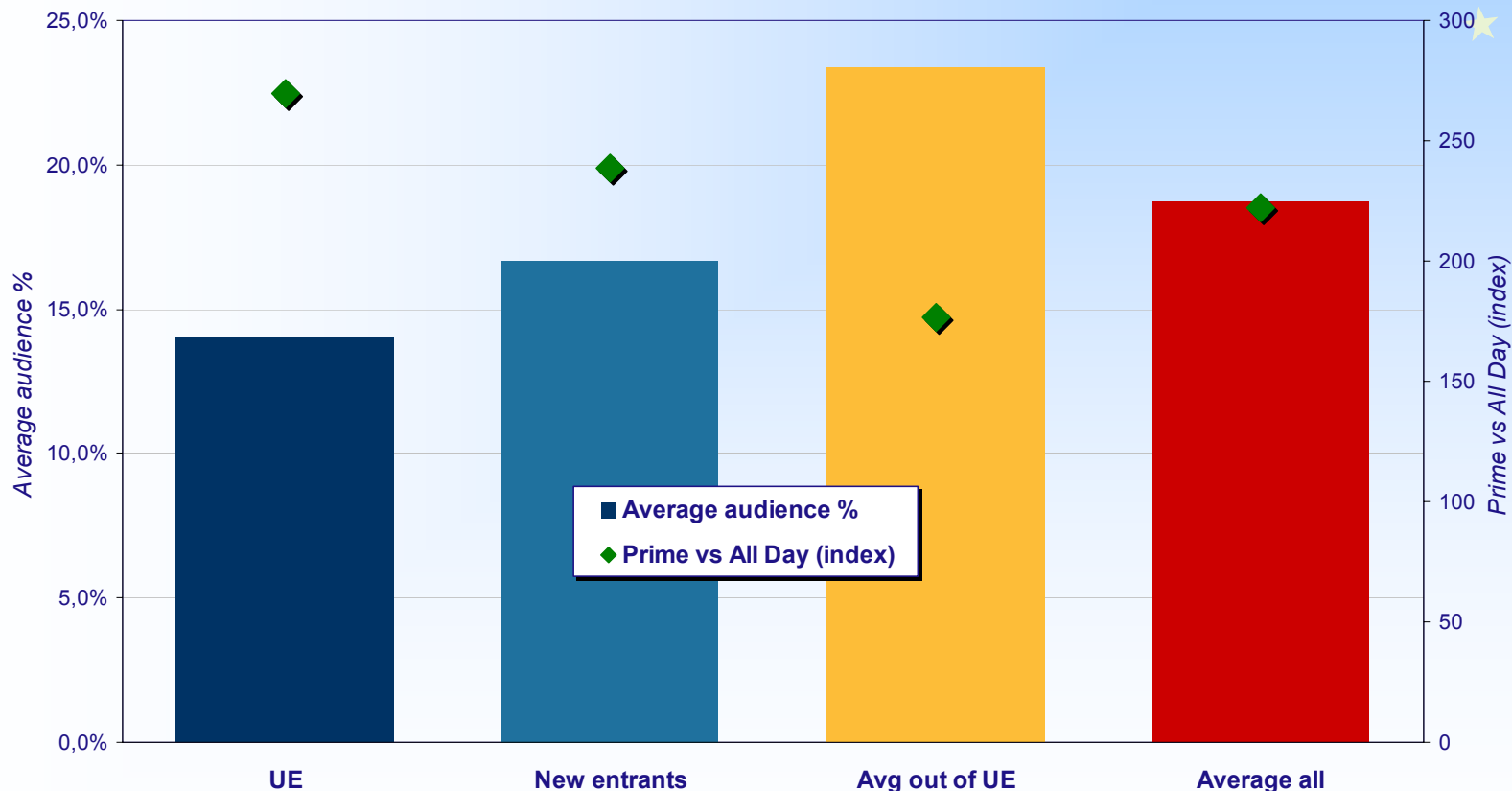


economic part - Carat

# 3. Audiovisual landscapes

- Key Facts : the power of TV

Average Audience in 2003

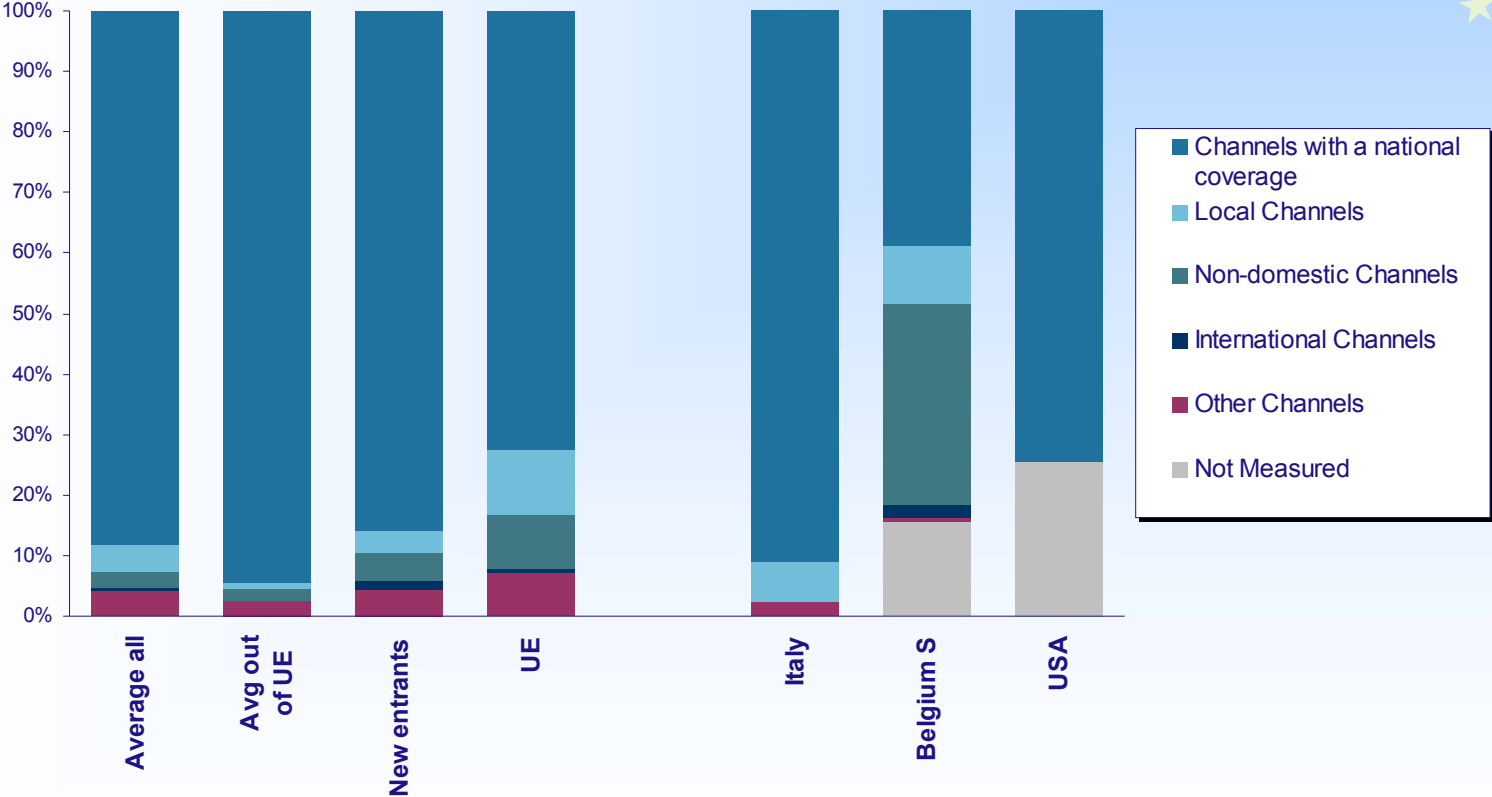


economic part - Carat

# 3. Audiovisual landscapes

- Key Facts : the power of TV

Profile of the channels offer (TOTAL DAY audience based)

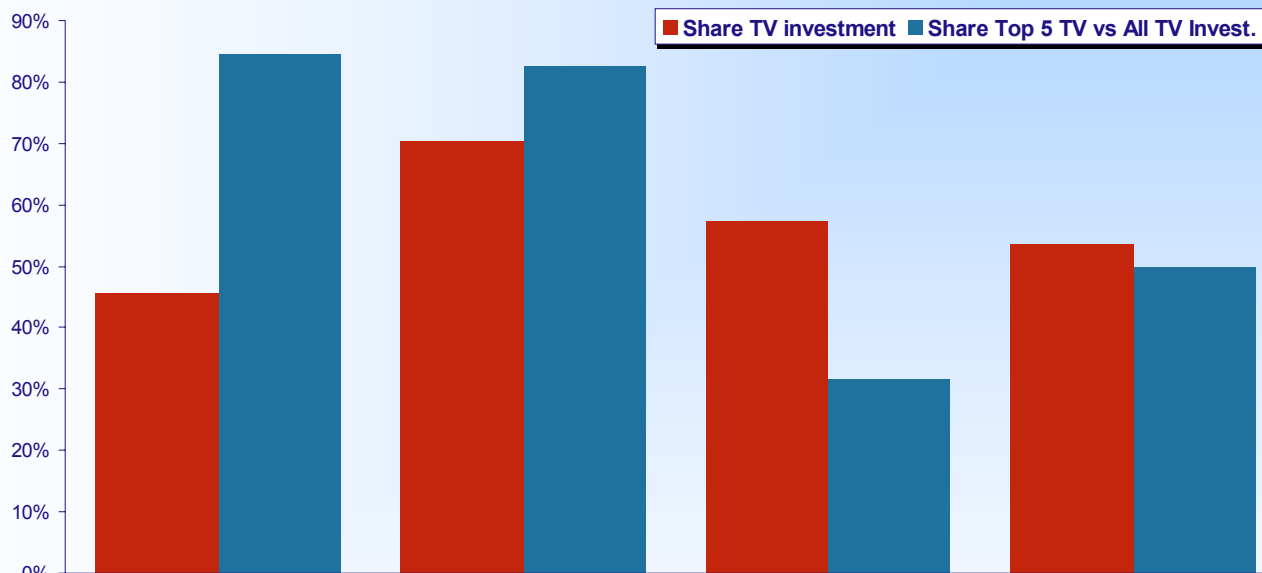


economic part - Carat

# 3. Audiovisual landscapes

- Key Facts : the power of TV

The weight of TV advertising



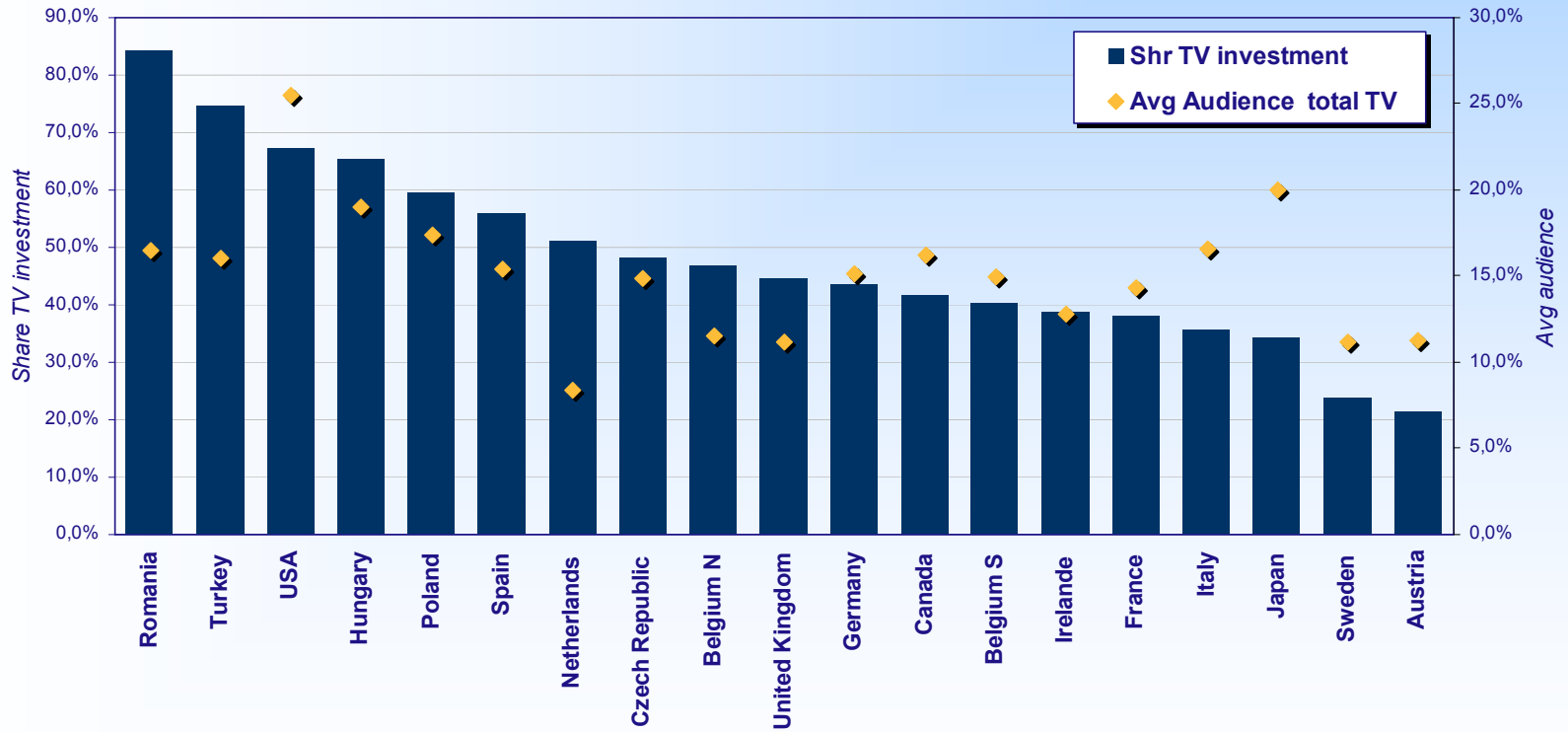
	Average UE 15	New entrants	Average out of UE	Average all
<b>Media invest / GDP</b>	<b>1,2%</b>	<b>2,5%</b>	<b>1,1%</b>	<b>1,2%</b>
<b>Invest / inhab.</b>	<b>288,70</b>	<b>154,47</b>	<b>480,16</b>	<b>349,80</b>
<b>Invest TV / inhab.</b>	<b>131,80</b>	<b>108,62</b>	<b>275,91</b>	<b>187,30</b>

economic part - Carat

# 3. Audiovisual landscapes

- Key Facts : the power of TV

TV advertising - Share per country vs daily rating

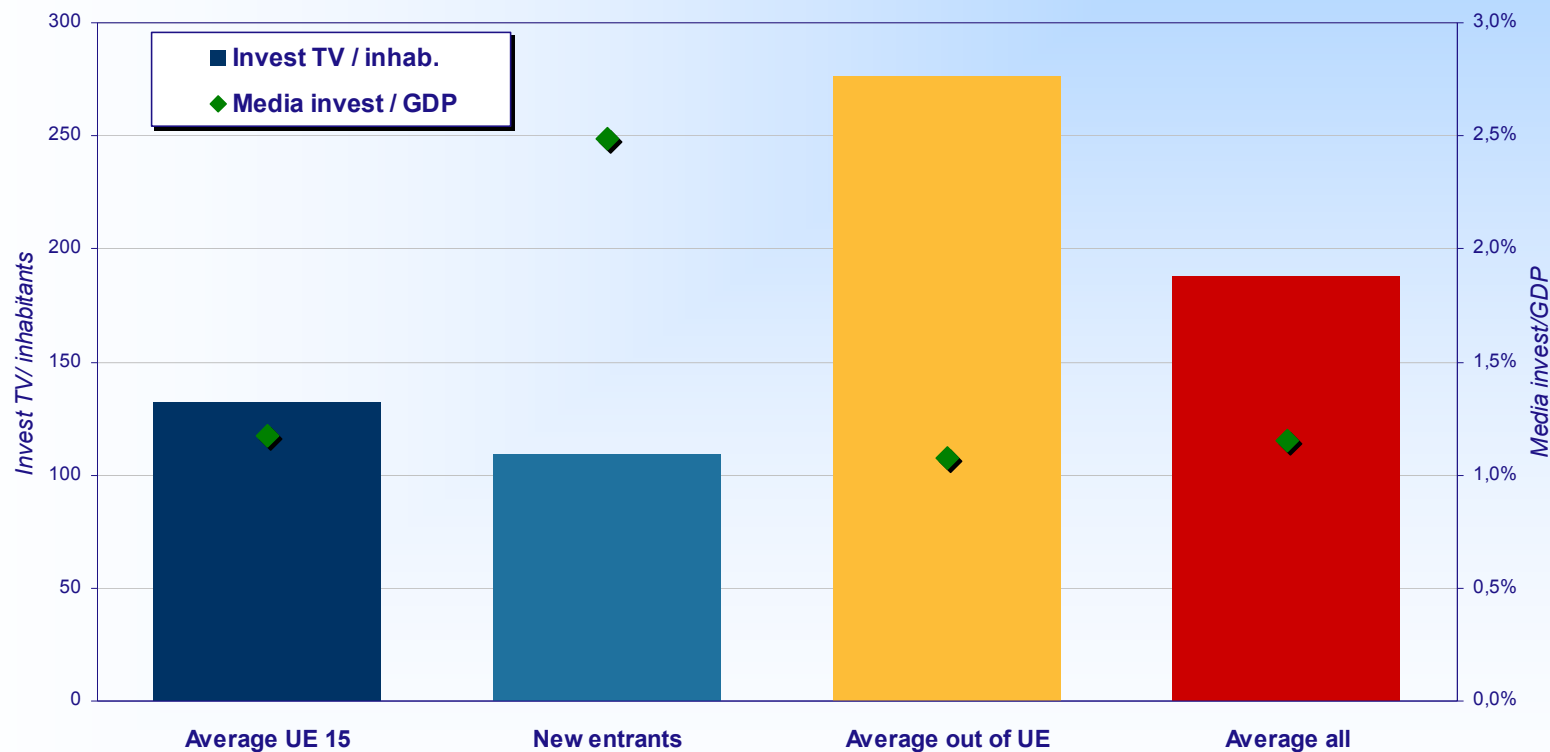


economic part - Carat

# 3. Audiovisual landscapes

- Key Facts : advertising on TV

Advertising related to GDP and population

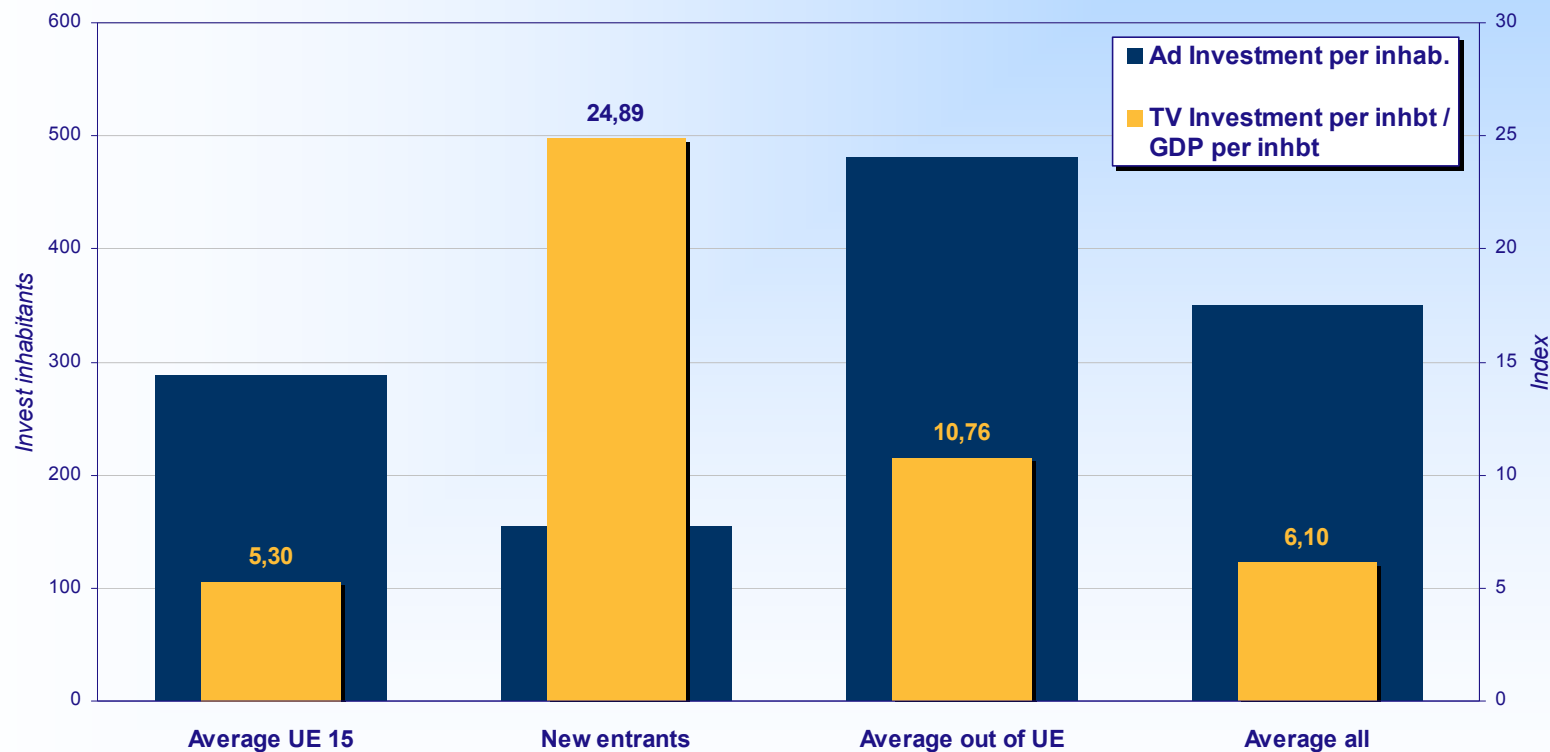


economic part - Carat

# 3. Audiovisual landscapes

- Key Facts : advertising on TV

Pragmatical index : Advertising related to economy power

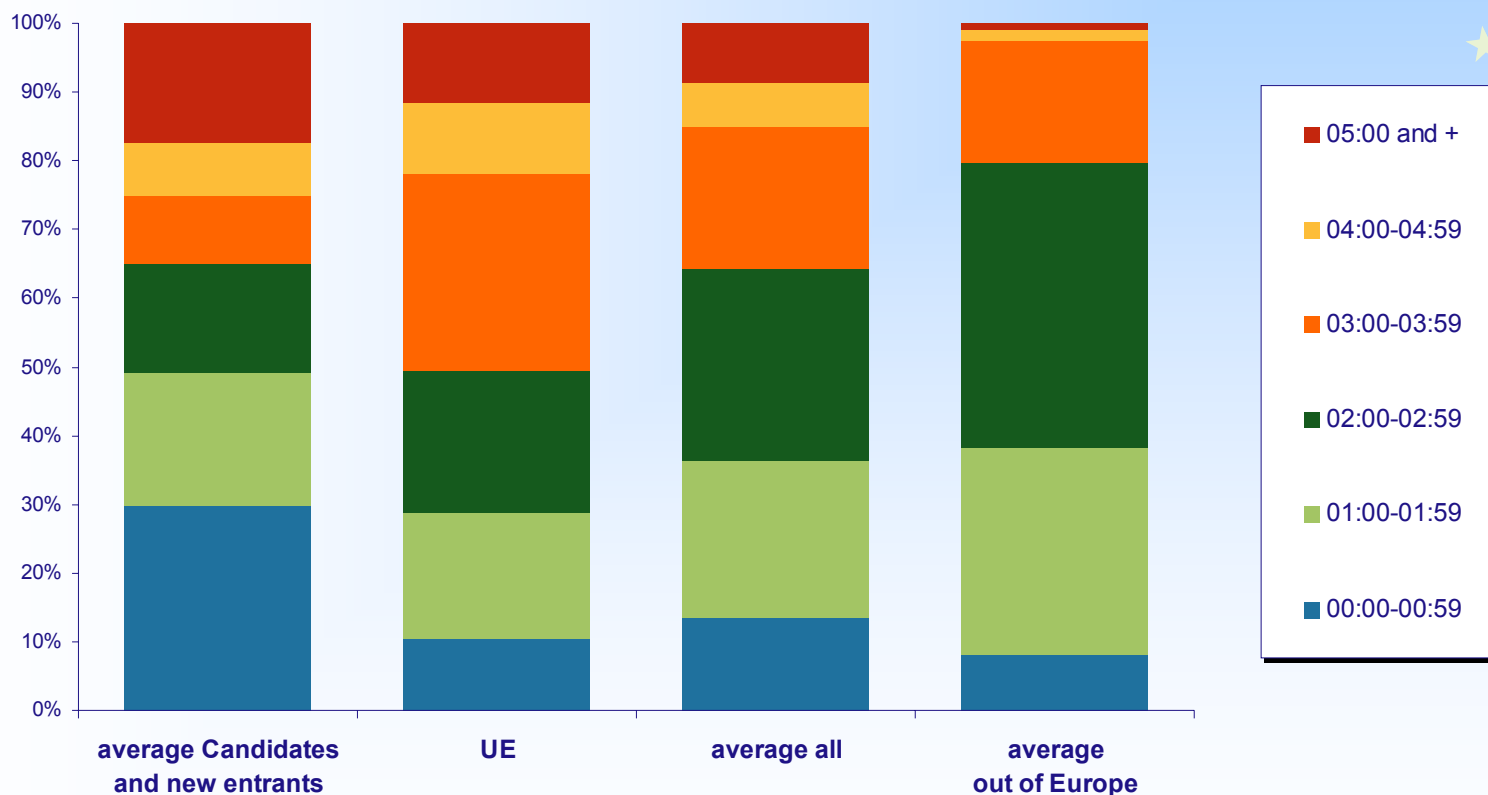


economic part - Carat

# 3. Audiovisual landscapes

- Key Facts : advertising on TV

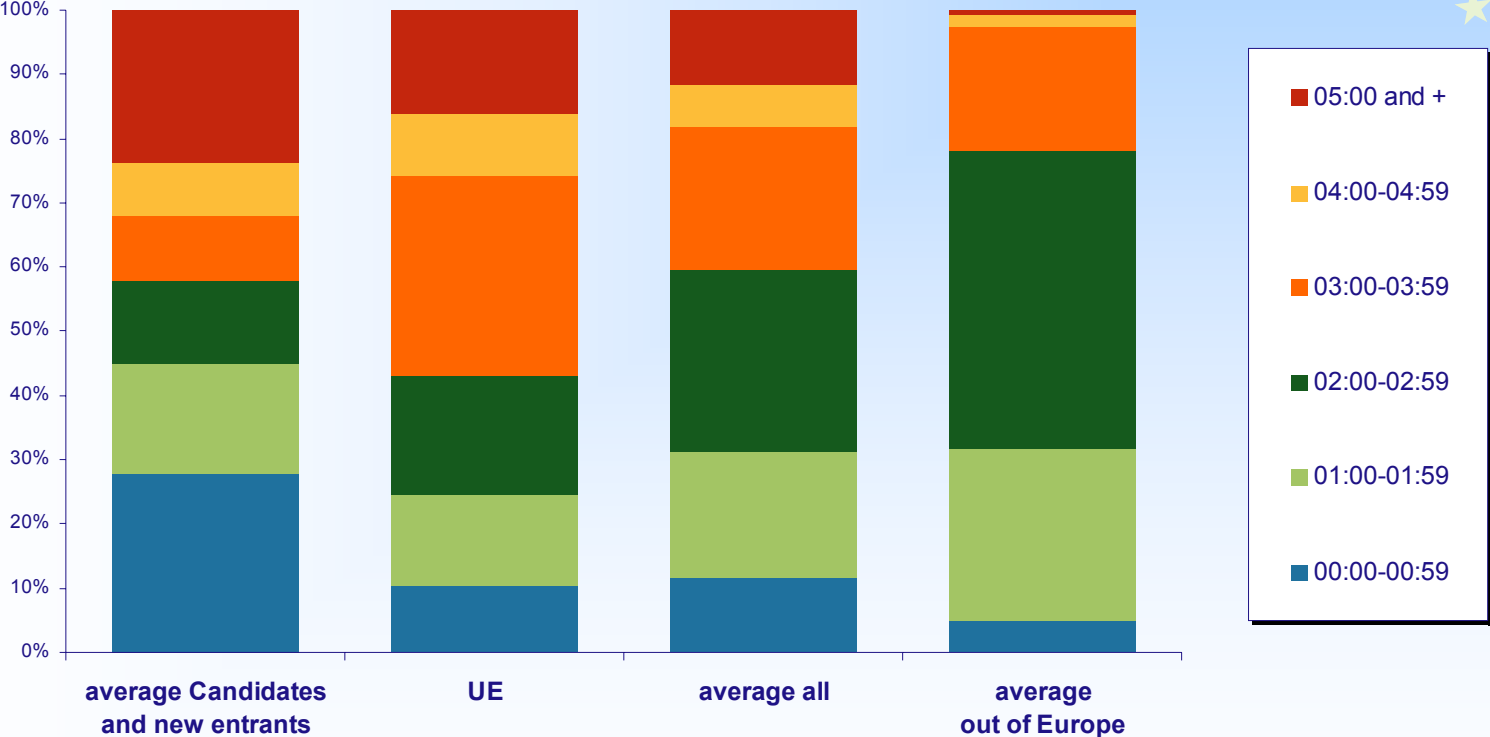
Breakdown by duration in minutes (TOTAL DAY)



# 3. Audiovisual landscapes

- Key Facts : advertising on TV

Breakdown by duration in minutes (Prime time)

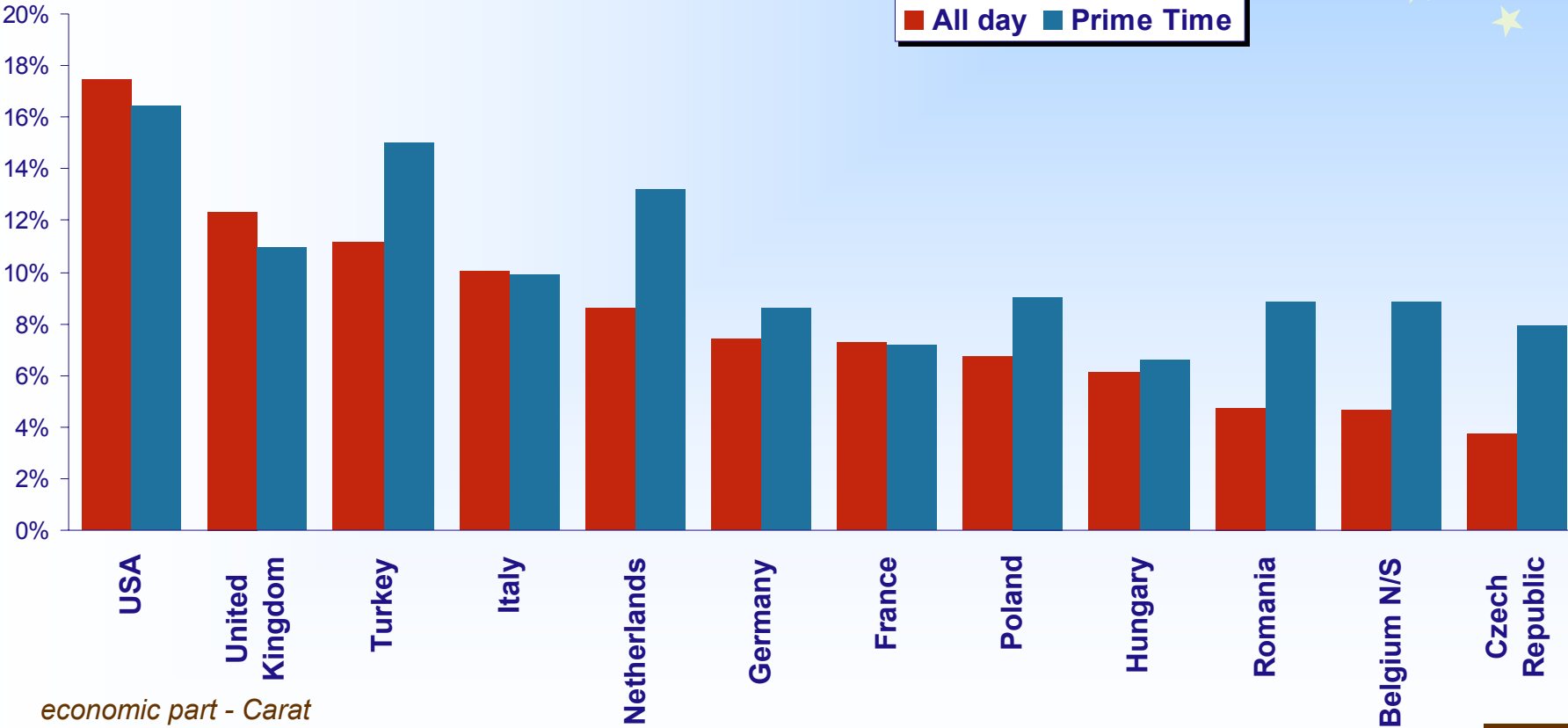


economic part - Carat

# 3. Audiovisual landscapes

- Key Facts : advertising on TV

Total Advertising (incl. Sponsoring)

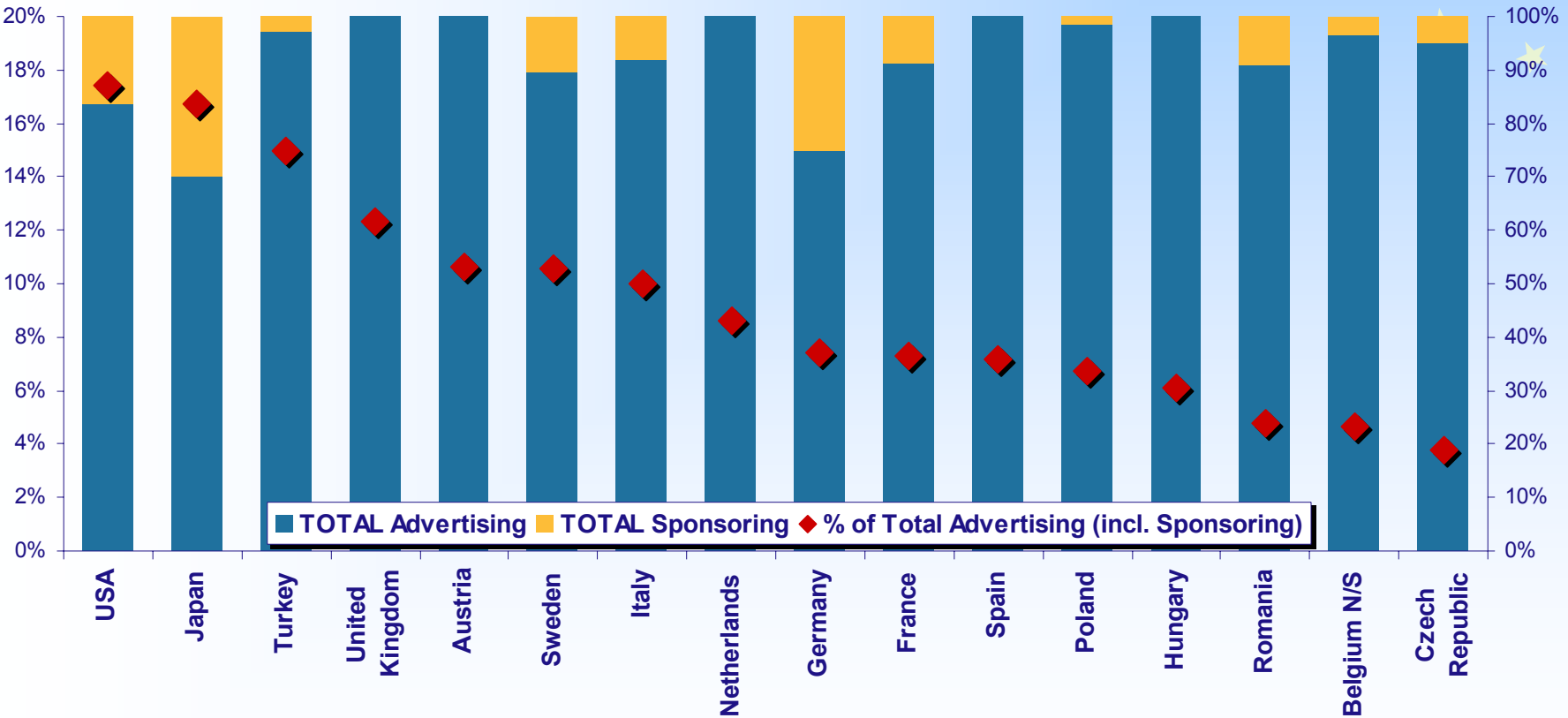


economic part - Carat

# 3. Audiovisual landscapes

## Key Facts : advertising on TV

### Hourly Advertising % and sponsoring share

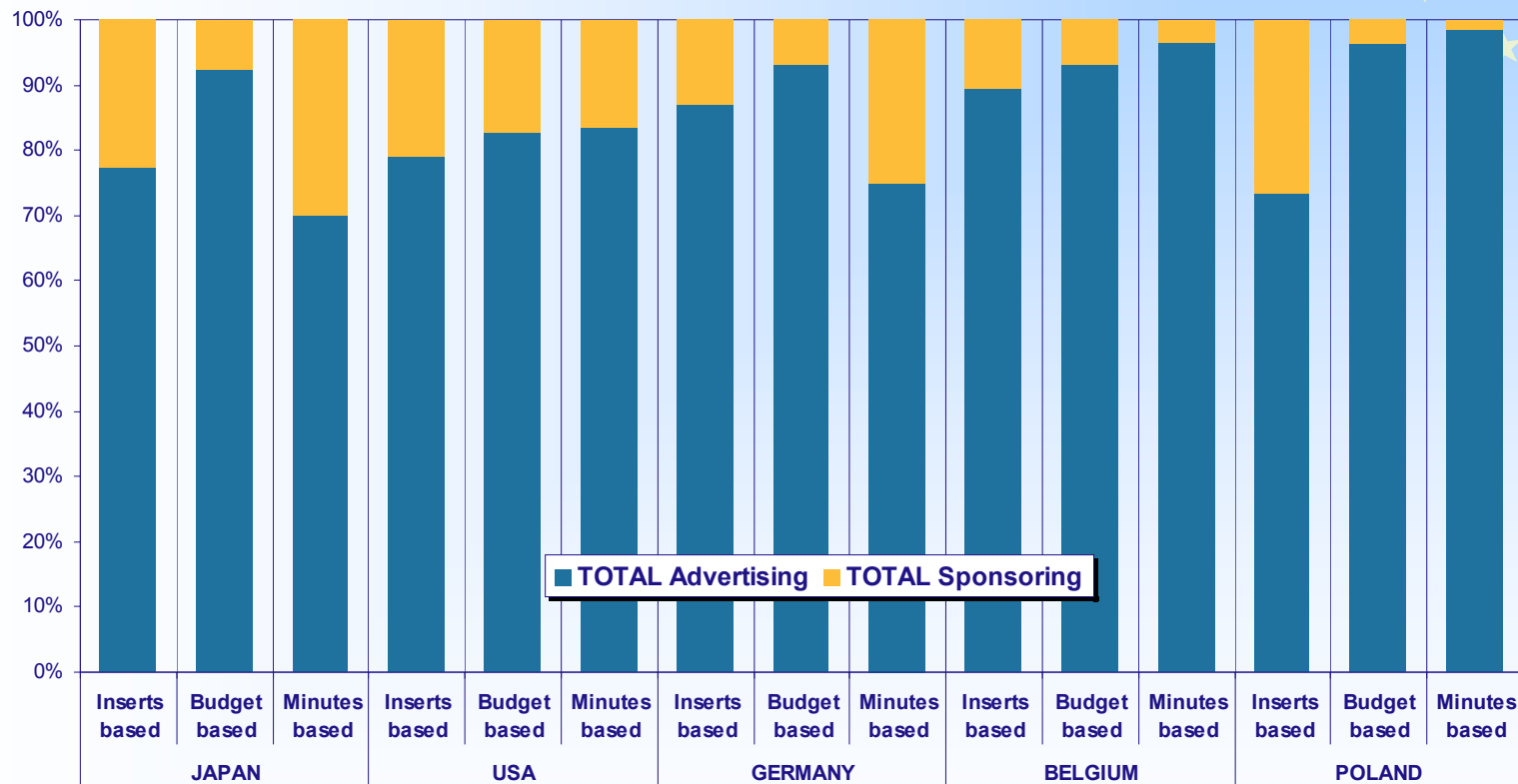


economic part - Carat

# 3. Audiovisual landscapes

- Key Facts : advertising on TV

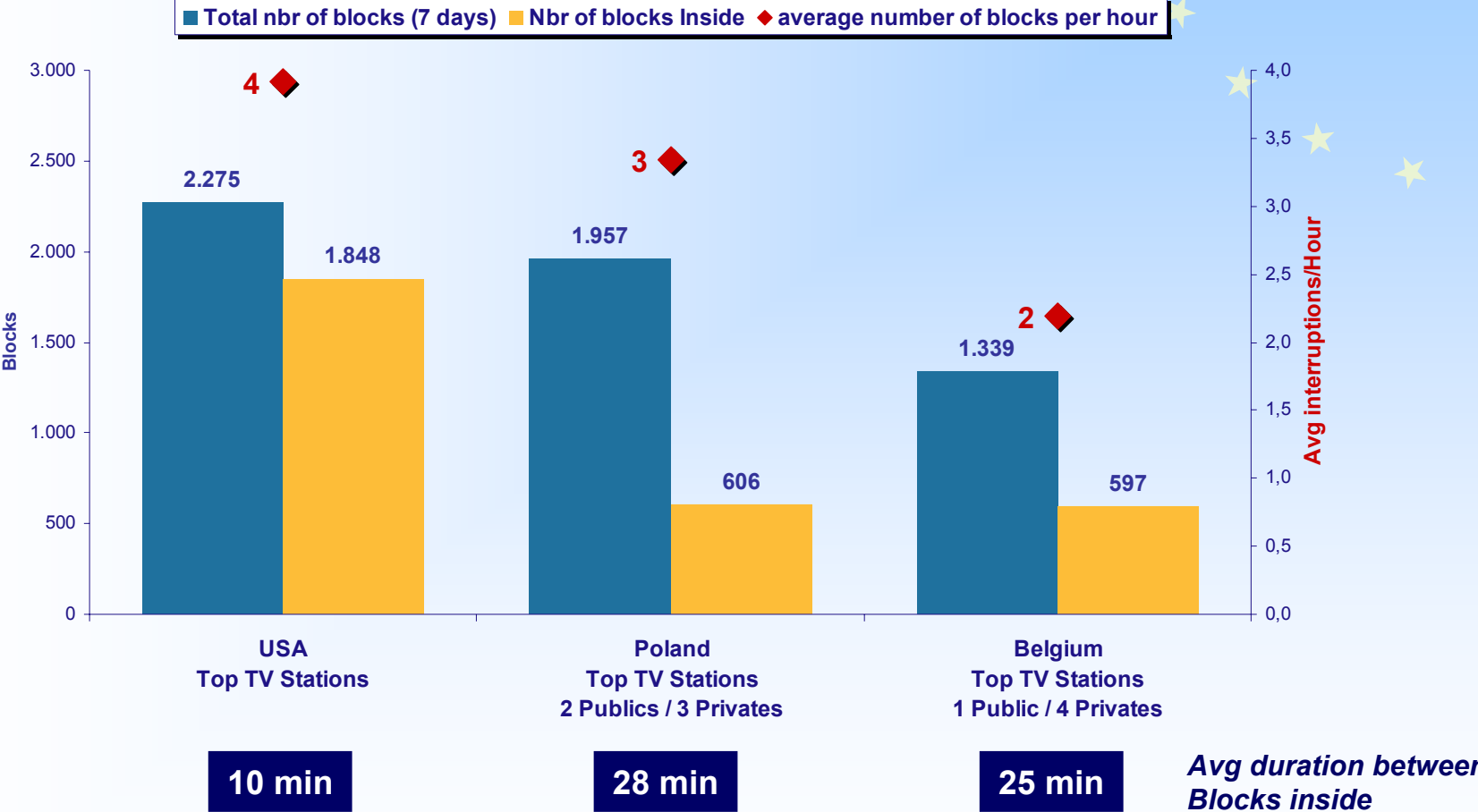
Share of sponsoring spots - a few markets



economic part - Carat

# 3. Audiovisual landscapes

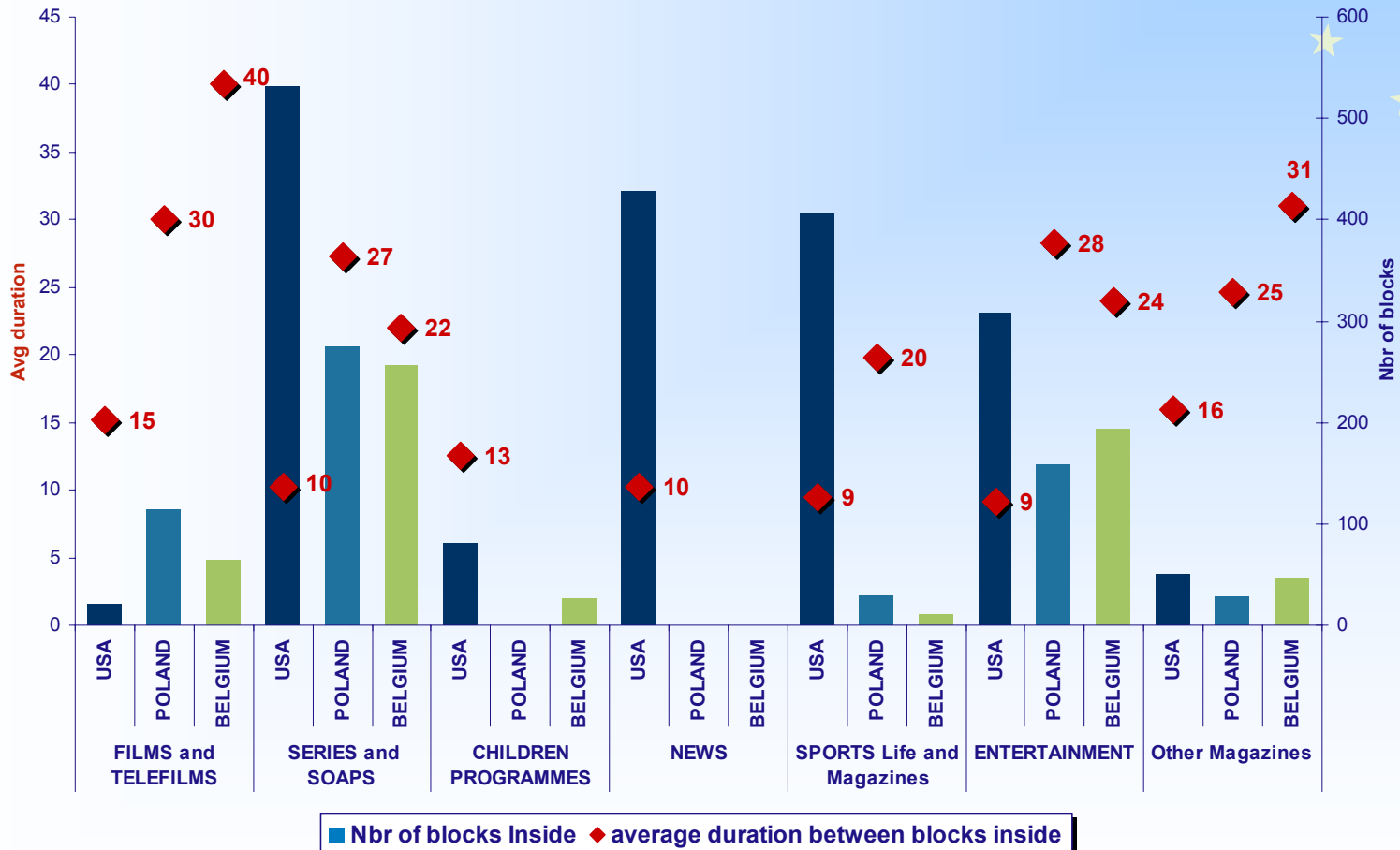
Programmes interruptions indicators



economic part - Carat

# 3. Audiovisual landscapes

## Key Facts : advertising on TV



economic part - Carat

## Belgium S.



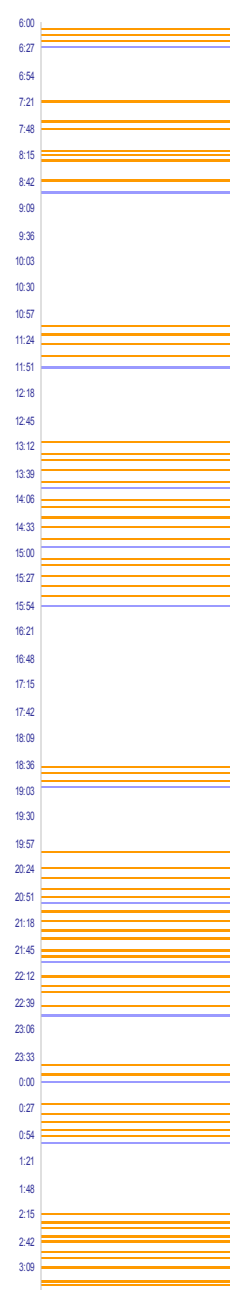
## Belgium N.



## Poland



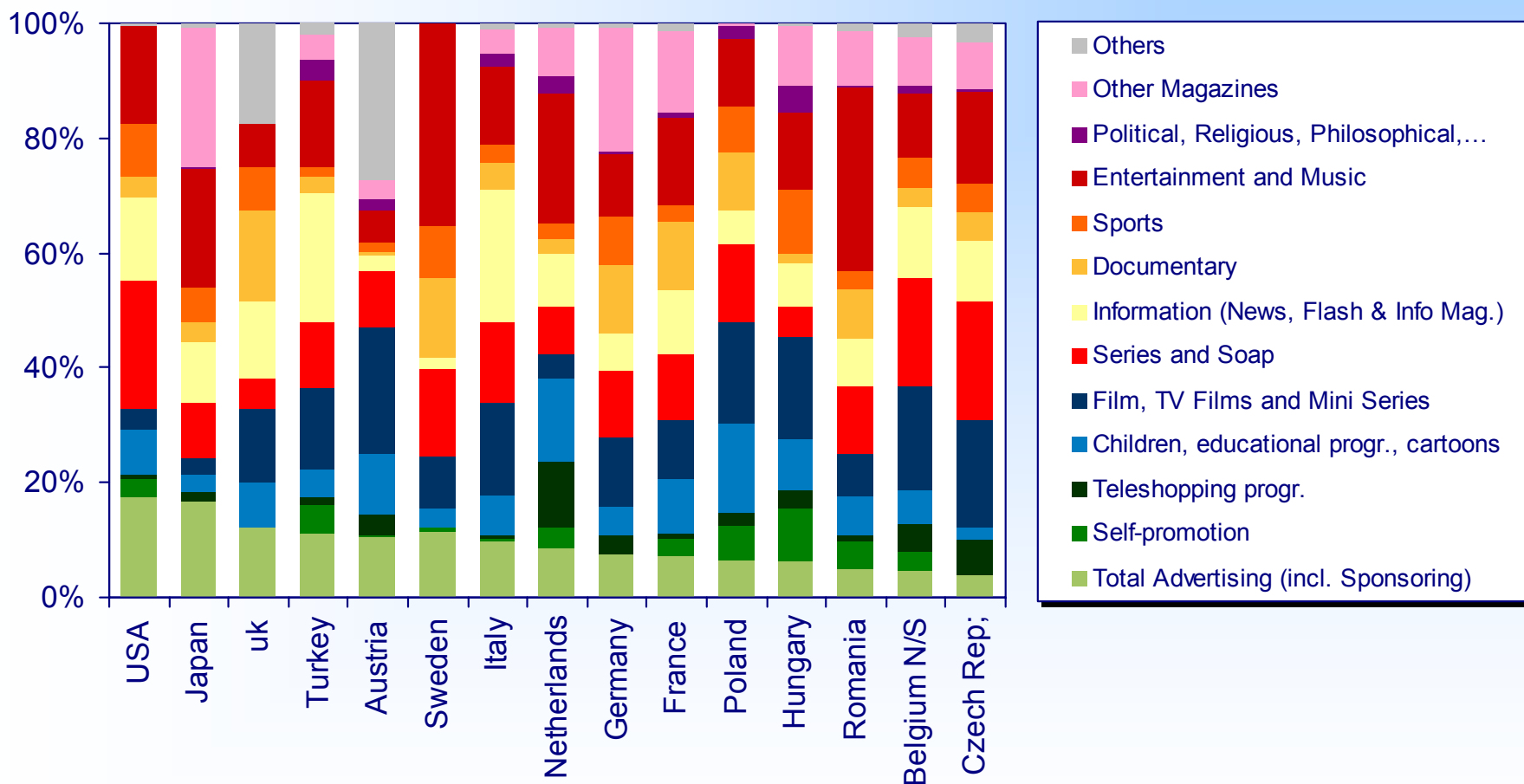
## USA



- A typical day schedule
  - ▶ Thursday of the week 43 (2003)
- Orange lines
  - ▶ Inside progr
- Blue lines
  - ▶ Between progr

# 3. Audiovisual landscapes

## Repartition of the broadcasted programmes (minutes based)

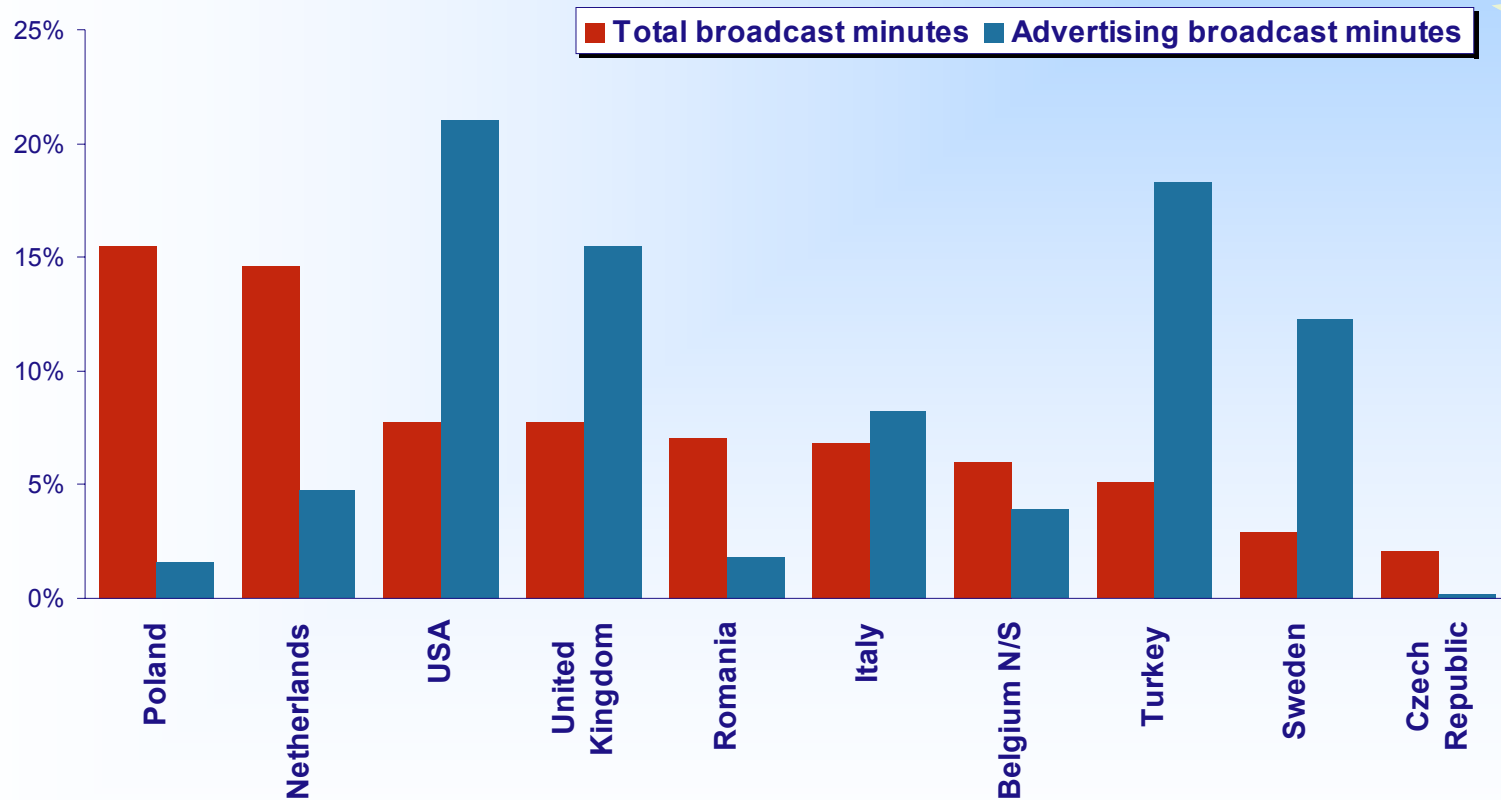


economic part - Carat

# 3. Audiovisual landscapes

- Key Facts : advertising on TV

Focus on specific groups : Children

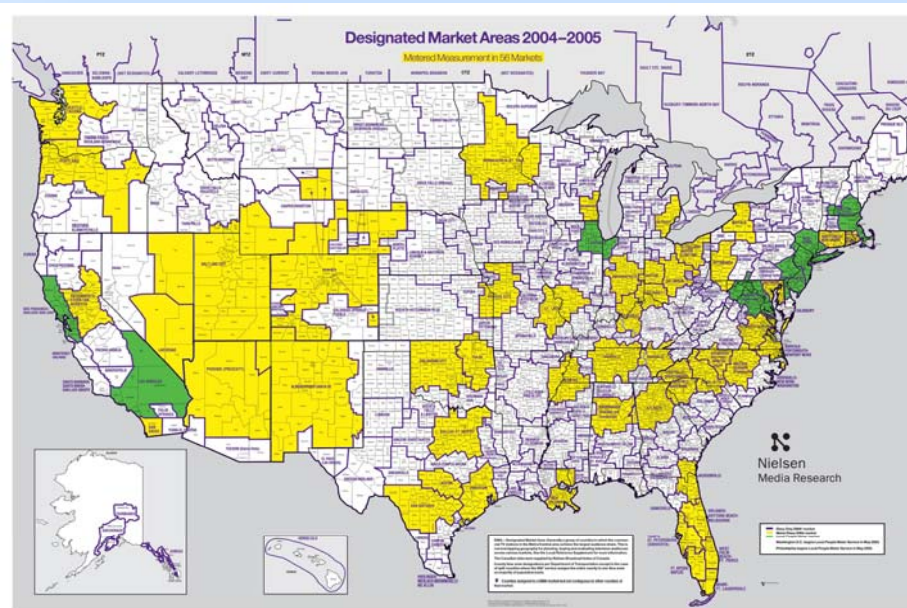


economic part - Carat

# 3. Audiovisual landscapes

## Key Facts : focus on the USA

- Various
  - ▶ 212 different (Nielsen) markets
  - ▶ National channels = 75% share of audience
- Advertising
  - ▶ Ad spendings = 250% ad pressure versus Europe
  - ▶ 85% of blocks during programmes
  - ▶ Avg of 4 blocks / hour
  - ▶ Avg of 10 min. between blocks
  - ▶ From 16 to 17% of advertising broadcast share during any day part and for all channels



*economic part - Carat*

# Focus on the USA

## Advertising special : the product placement

- EU members : may occur in cinema films, TV-films and series
- Other cases :
  1. Accidental / unplanned presences
  2. Mention of a product in the context of a sponsored programme  
= not advertising formats
  3. Placement of a product compensated by media space or finances = prohibited  
= logically not measured
- Specific case in the US : PP is **permitted**
  - ▶ But no « official » nor standard tools
  - ▶ Nielsen US recently developed such tracking



*economic part - Carat*

# Focus on the USA

## Advertising special : the product placement

- **The product placement – Tool & Methodology**
- **Source** : Nielsen Placeviews – private and unofficial (so far)
- Tracking from **September '03**
  - ▶ Systematical record of the main TV's broadcasts (6)
  - ▶ Activity on prime time for a selection of programmes
- **Output**
  - ▶ Product placements visual and verbal mentions if any
  - ▶ Computed duration, PP mode, programme & genre, rating
  - ▶ Brands, industry sectors
  - ▶ Moment & date
  - ▶ No investments !
- **Following data**
  - ▶ Based on Sept' 03 – Nov' 04 period
  - ▶ Split between PP inside TV programmes and inside Films & series

*economic part - Carat*

# Focus on the USA

## Advertising special : the product placement

- Modes of operation
  - ▶ “**Foreground**” : the product is visible in front of the scene
  - ▶ “**Background**” : the product is visible behind the scene
  - ▶ “**Prop**” : the character is utilizing the product
  - ▶ “**Scene**” : the product is visible for a longer duration and coming in and out of the scene as any or all of the other placement types listed (this is most common with the automotive industry)
  - ▶ “**Brand Mention**” : the brand is simply mentioned
  - ▶ “**Dialogue Mention**” : a more scripted conversation surrounding the product
- Several formats of PP are mixing these various modes and are referenced as such in the tables

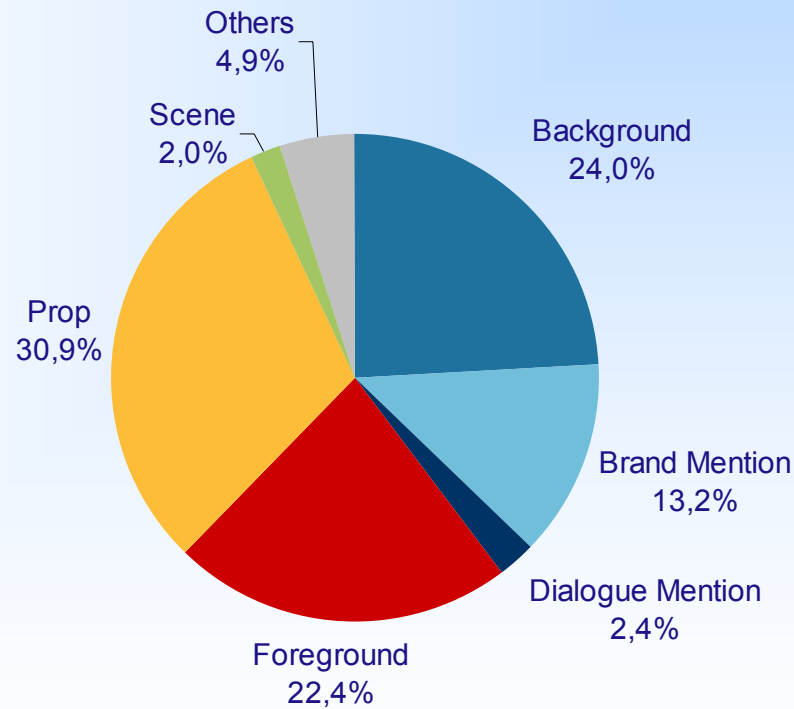


# Focus on the USA

## Advertising special : the product placement

- Product Placement : presence in TV Programmes

Frequency of action per PP mode



economic part - Carat

Periode : Sep.'03- Nov.'03

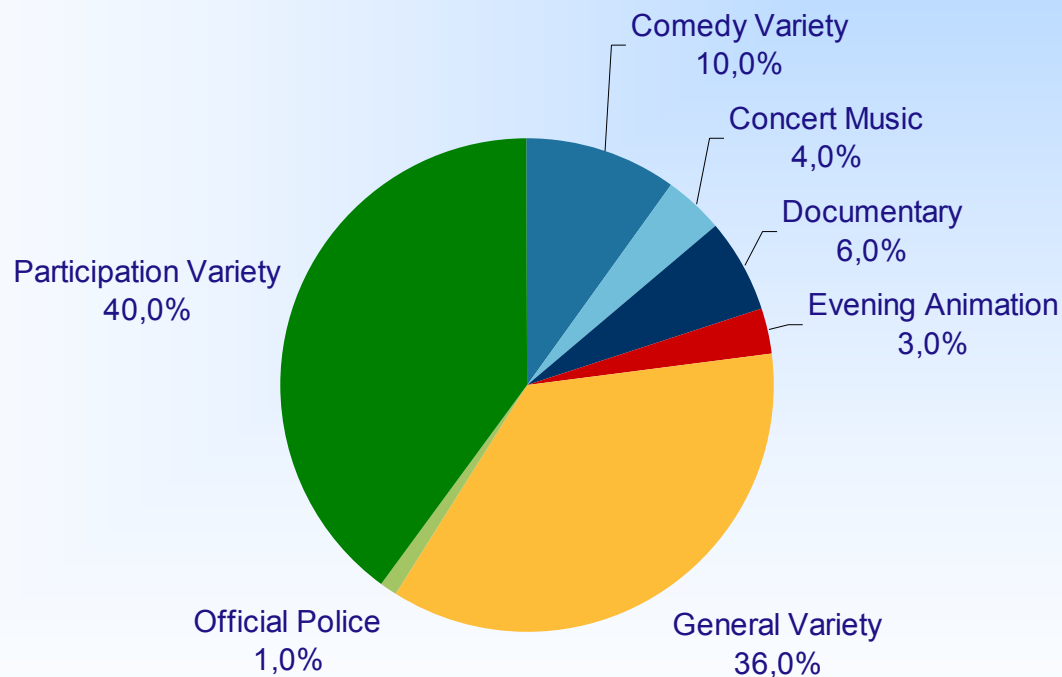
Source : Nielsen I

# Focus on the USA

## Advertising special : the product placement

- Product Placement : presence in TV Programmes

Frequency of actions per programme genre



# Focus on the USA

## Advertising special : the product placement

- Product Placement : presence in TV Programmes

### Frequency of actions : PP actions versus product genres

	Share	
1 Reg Soft Drink	10,3%	
2 Apparel	6,4%	
3 Baseball Team	4,4%	
4 Internet SVC Provider	3,9%	
5 University	3,9%	
6 Autos	3,6%	
7 Hotel-Casino	3,5%	
8 Trucks	3,2%	
9 Restaurant	3,0%	
10 Basketball Team	2,1%	
11 Airlines-Pass	1,8%	
12 Store-Apparel	1,7%	
13 Magazine	1,4%	
14 Sporting Footwear	1,4%	
15 Sporting Equip	1,3%	
16 Store-Dept	1,2%	
17 Teleph SVCS-Wireless	1,2%	
18 Autos & Trucks	1,2%	
19 Football Team	1,2%	
20 Hotels-Motels	1,1%	
		<b>Share Top 20</b>
		57,8%

economic part - Carat

Periode : Sep.'03- Nov.'03

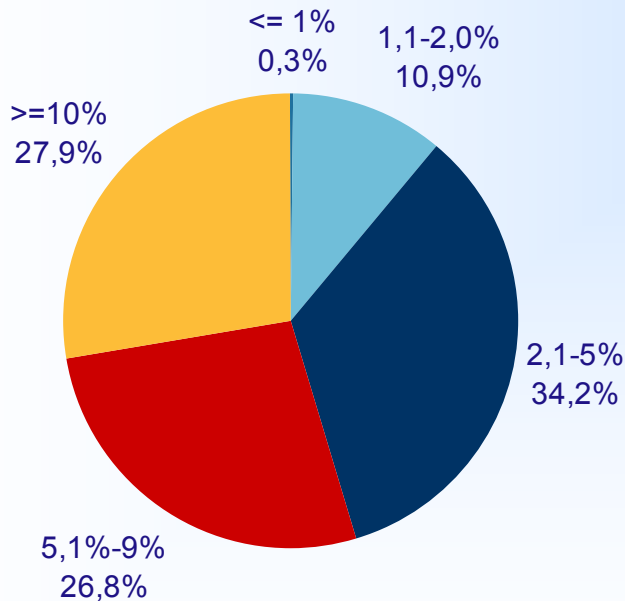
Source : Nielsen I

# Focus on the USA

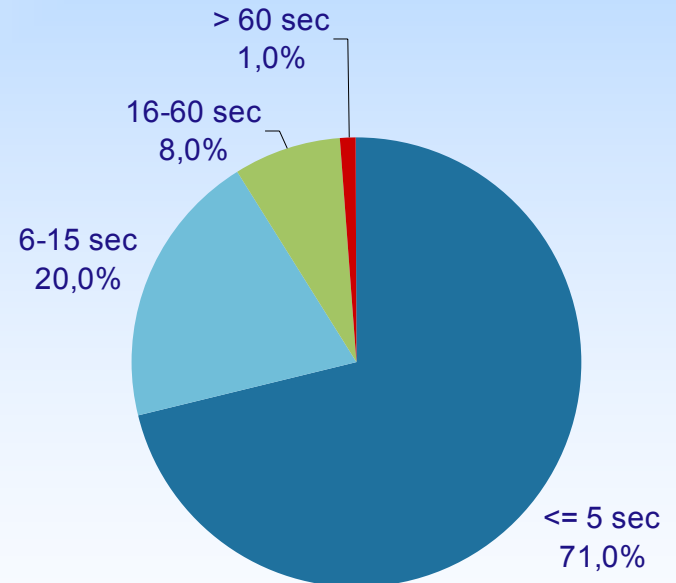
## Advertising special : the product placement

- Product Placement : presence in TV Programmes

**Audience per actions  
mode (ratings)**



**Duration per actions  
mode (seconds)**



*economic part - Carat*

*Periode : Sep.'03- Nov.'03*

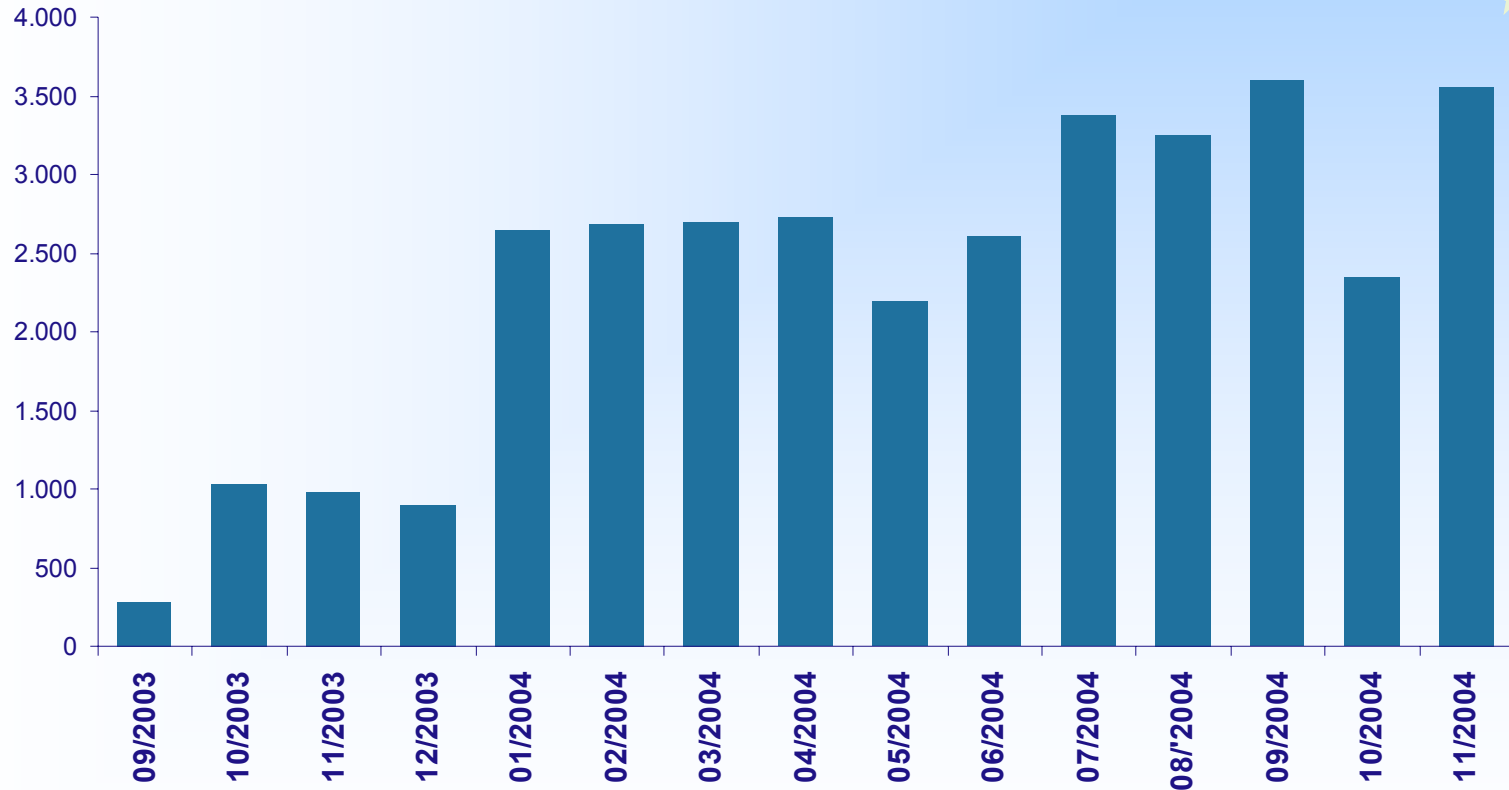
*Source : Nielsen I*

# Focus on the USA

## Advertising special : the product placement

- Product Placement : presence in TV Programmes

Occurrences of PP action evolution



economic part - Carat

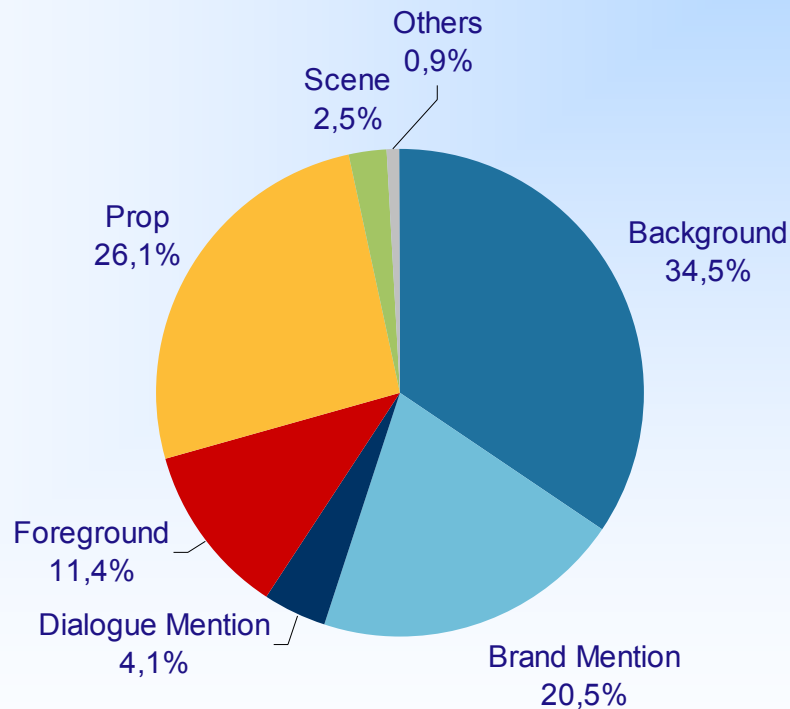
Periode : Sep. '03- Nov. '04 - Source : Nielsen I

# Focus on the USA

## Advertising special : the product placement

### Product Placement : presence in Films & Series

Frequency of actions per PP mode



economic part - Carat

Periode : Sep.'03- Nov.'03

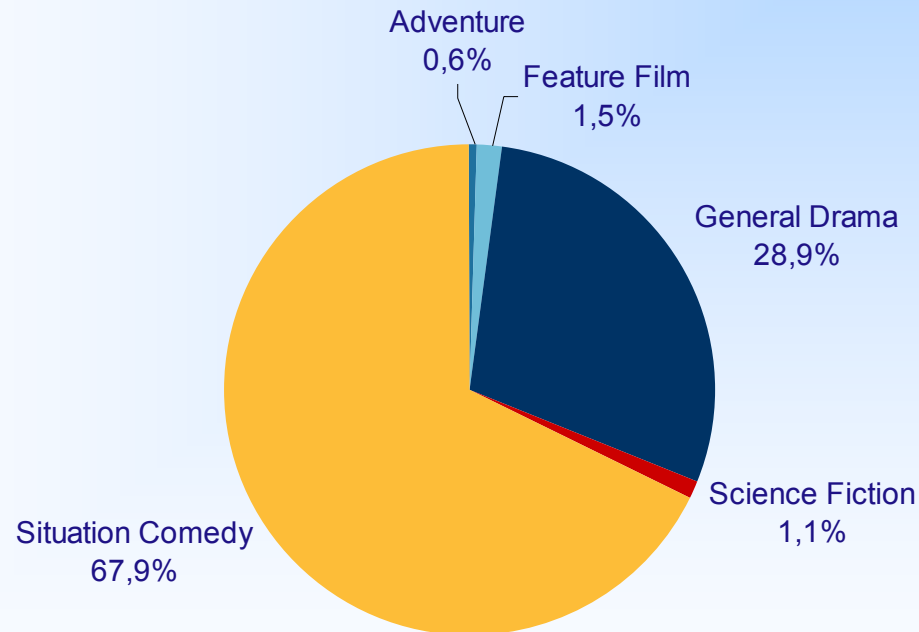
Source : Nielsen I

# Focus on the USA

## Advertising special : the product placement

Product Placement : presence in Films & Series

Frequency of actions per programme genre



# Focus on the USA

## Advertising special : the product placement

### Product Placement : presence in Films & Series

#### Frequency of actions : PP actions versus product ge

	Share	
1 Apparel	10,0%	
2 Autos	6,3%	
3 Beer	4,6%	
4 Football Team	3,5%	
5 Trucks	3,3%	
6 University	2,8%	
7 Basketball Team	2,3%	
8 Magazine	2,3%	
9 Baseball Team	2,0%	
10 Recordings-Video	1,6%	
11 Cereal	1,5%	
12 Game-Board	1,4%	
13 Reg Soft Drink	1,4%	
14 Computer SYS	1,3%	
15 Bottled Water	1,3%	
16 Sporting Assn	1,3%	
17 Hotel-Casino	1,2%	
18 Potato Chips	1,1%	
19 Restaurant-Quick SVC	0,9%	
20 Cable TV Network	0,9%	
		<b>Share Top 20</b>
		51,0%

*economic part - Carat*

*Periode : Sep.'03- Nov.'03*

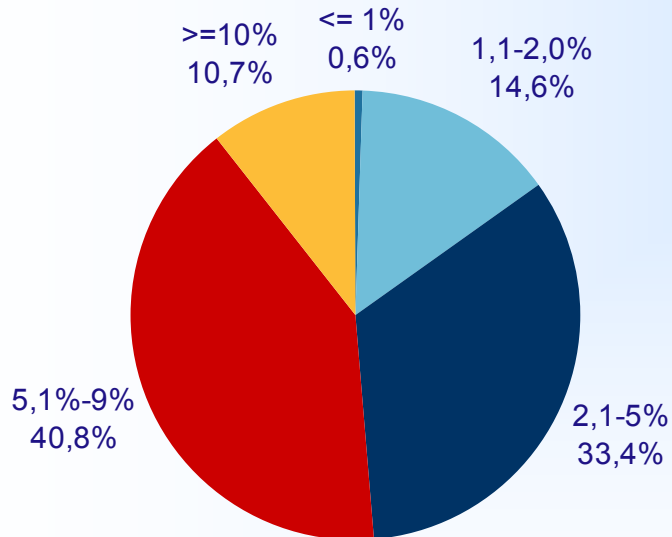
*Source : Nielsen I*

# Focus on the USA

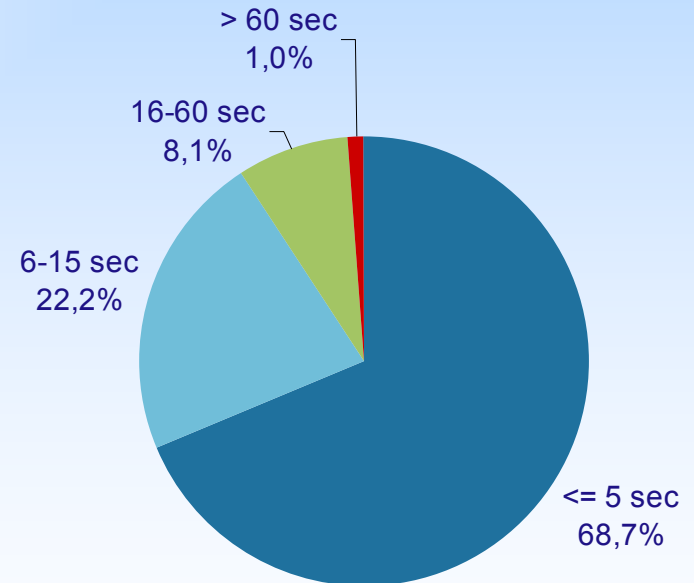
## Advertising special : the product placement

### Product Placement : presence in Films & Series

**Audience per actions  
mode (ratings)**



**Duration per actions  
mode (seconds)**



*economic part - Carat*

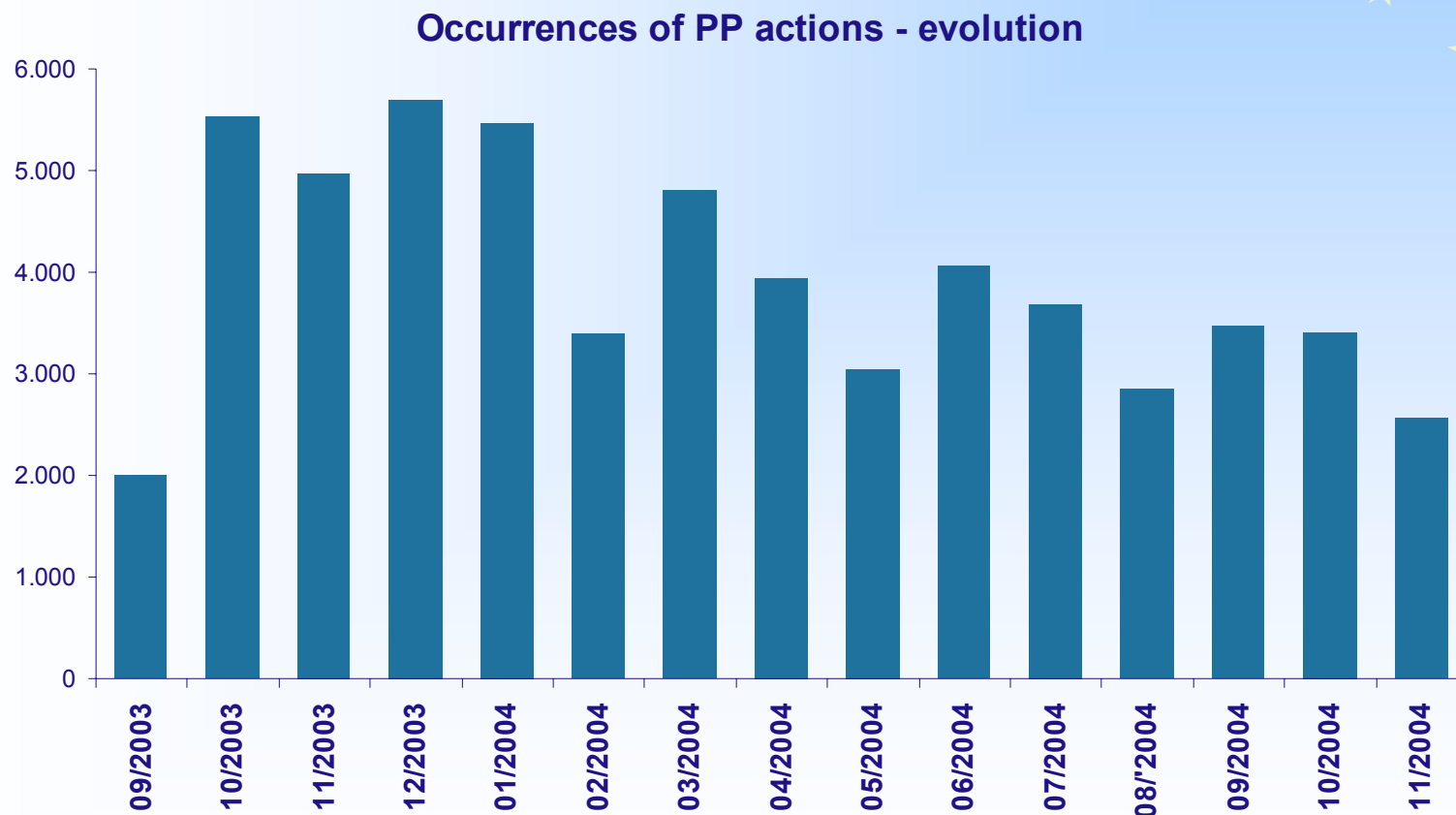
*Periode : Sep.'03- Nov.'*

*Source : Nielsen I*

# Focus on the USA

## Advertising special : the product placement

### Product Placement : presence in Films & Series



economic part - Carat

Periode : Sep. '03- Nov. '04 - Source : Nielsen I

# Audiovisual landscapes

## Key facts : focus on the USA

- **The product placement – revenues estimate**
- **2 Options** – out of unplanned presences:
  1. Trade-off of integration or placement for a **supply of product**
  2. **Financial compensation** for placement or integration
- ▲ Difficulty : the estimate of the planned placements **share**
- ▲ The most common type of deal is an **exchange** of the product for the placement
  
- (But) Remunerated mentions are growing...
  - ▶ Cases from **15.000 to 25.000 \$ per second** broadcast
  - ▶ Function of the **ratings** ▲ The key could be a rate per second
  
- Estimated revenue for 2004 ?
  - ▶ Rates per second combined with ratings levels
  - ▶ Weighted by an index of planned actions share (50%)  
= **A minimum of 1.250 mo €** - Nielsen Placeviews-based  
▲ Equal to minimum of 1,7% of total TV adspend

# The impact of control measures on television advertising

Question time

Break



# Comparison of legal and economic data

Interactive session  
Question time

# Questions induced by the confrontation of the legal and economic data

- I. ADVERTISING SCREENS IDENTIFICATION
- II. ISOLATED ADVERTISING
- III. PRODUCT PLACEMENT
- IV. PROGRAMMES INTERRUPTIONS
- V. SPLIT SCREEN TECHNIQUE

- VI. SPONSORING
- VII. QUANTITATIVE RESTRICTIONS
- VIII. CHILDREN'S PROTECTION
- IX. EVOLUTION OF THE REGULATION

*Presentation of the study*

# Questions induced by the confrontation of the legal and economic data

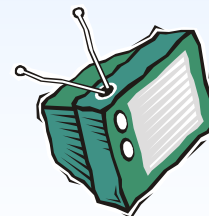
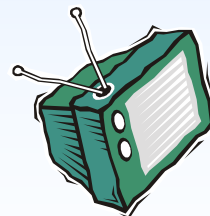
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*Presentation of the study*

# Surreptitious advertising and product placement

## Legal data

### PRODUCT PLACEMENT

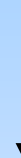


- INSERTION BY THE PRODUCER
- FINANCING THE PROGRAMMES
- CLEAR INFORMATION OF THE AUDIENCE

?

=

### SURREPTITIOUS ADVERTISING



- ← INTENTION OF THE BROADCASTER
- ← SERVING ADVERTISING
- ← NO INFORMATION OF THE AUDIENCE

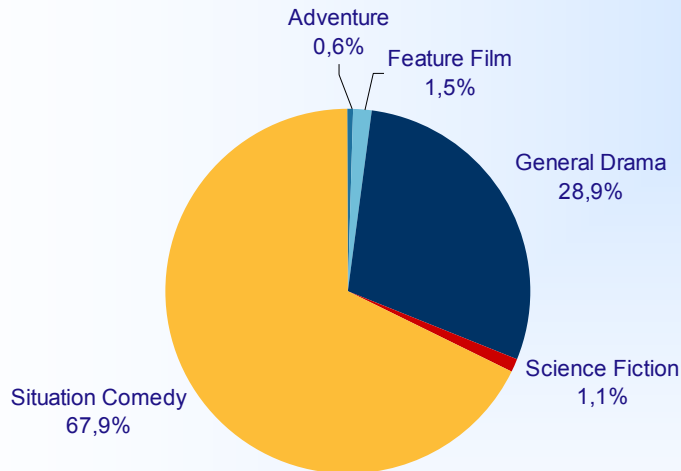
# Surreptitious advertising and product placement

## Economic data

- NATURE OF THE PROGRAMMES CONTAINING PRODUCT PLACEMENT

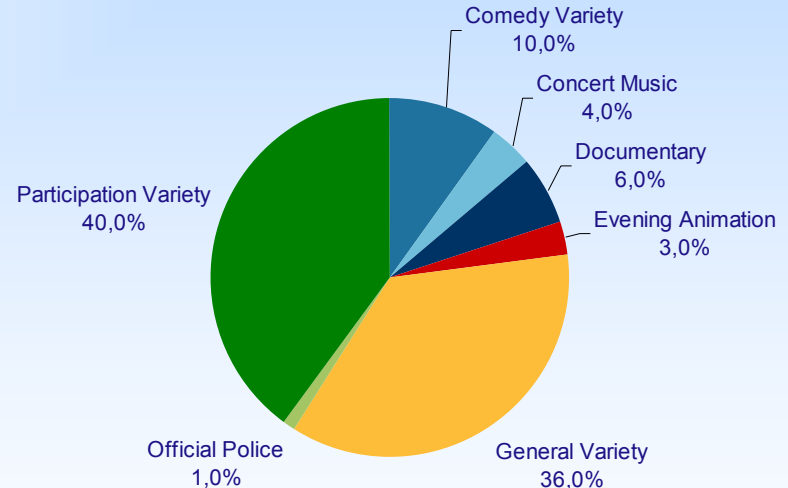
### Fictions

Frequency of actions per programme genre



### TV programmes

Frequency of actions per programme genre



Source : Nielsen US  
Main TV channels – 2003/2004

# Surreptitious advertising and product placement

## Questions

- A PRACTICE TO BE LEGALISED ?
- IF IT IS TO BE LEGALISED : Conditions ? Control ?
  - ▶ Identification rules ? Notification rules ?
  - ▶ Calculation included in the maximum volume of advertising? Other measures ?
  - ▶ Product placement prohibited within certain programmes
  - ▶ Minimum duration of the programmes containing product placement ?
  - ▶ Maximum duration of the product placement ?  
Maximum number of appearances of products placement / trademark?

# Programmes interruptions

## Economic data

Week 43 - 2003	USA Top TV Stations	Poland Top TV Stations 2 Publics / 3 Privates	Belgium Top TV Stations 1 Public / 4 Privates
Total nbr of blocks (7 days)	2275	1957	1339
average number of blocks per hour	4	3	2
<b>Nbr of broadcasts containing blocks</b>	<b>404</b>	<b>343</b>	<b>440</b>
Nbr of blocks Inside vs Total nbr of blocks	1.848 81%	606 31,0%	597 45%
average duration between blocks inside	<b>10</b>	28	25

- THE ESSENTIAL OBJECTIVES OF THE DIRECTIVE :
  - ▶ PROGRAMMES' INTEGRITY AND RIGHT HOLDERS PROTECTION
  - ▶ CONSUMER PROTECTION
    - ▶ (Viewer's comfort ↔ Control of the advertising pressure)
  - ▶ MINORS' PROTECTION
  
- VAGUE CONCEPTS (Interpretative Communication)
  - ▶ («Autonomous parts », « Natural breaks » / « Accidental breaks » / «Children's programmes»)

# PROGRAMMES INTERRUPTIONS

## QUESTIONS

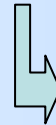
### 1. SPECIFYING ?

### (OR) SIMPLIFYING ARTICLE 11 ?

↳ « Autonomous parts »

↳ « Natural breaks »

↳ .....

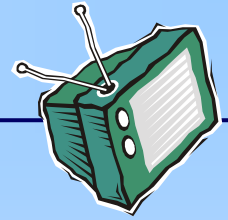


- Protected programmes = No interruptions (Art. 11.5)
- interruptions of audiovisual work : Status quo (Art. 11.3)
- Interruptions 'between' and 'within' the programmes (Art. 11.1)

### 2. PROPOSALS :

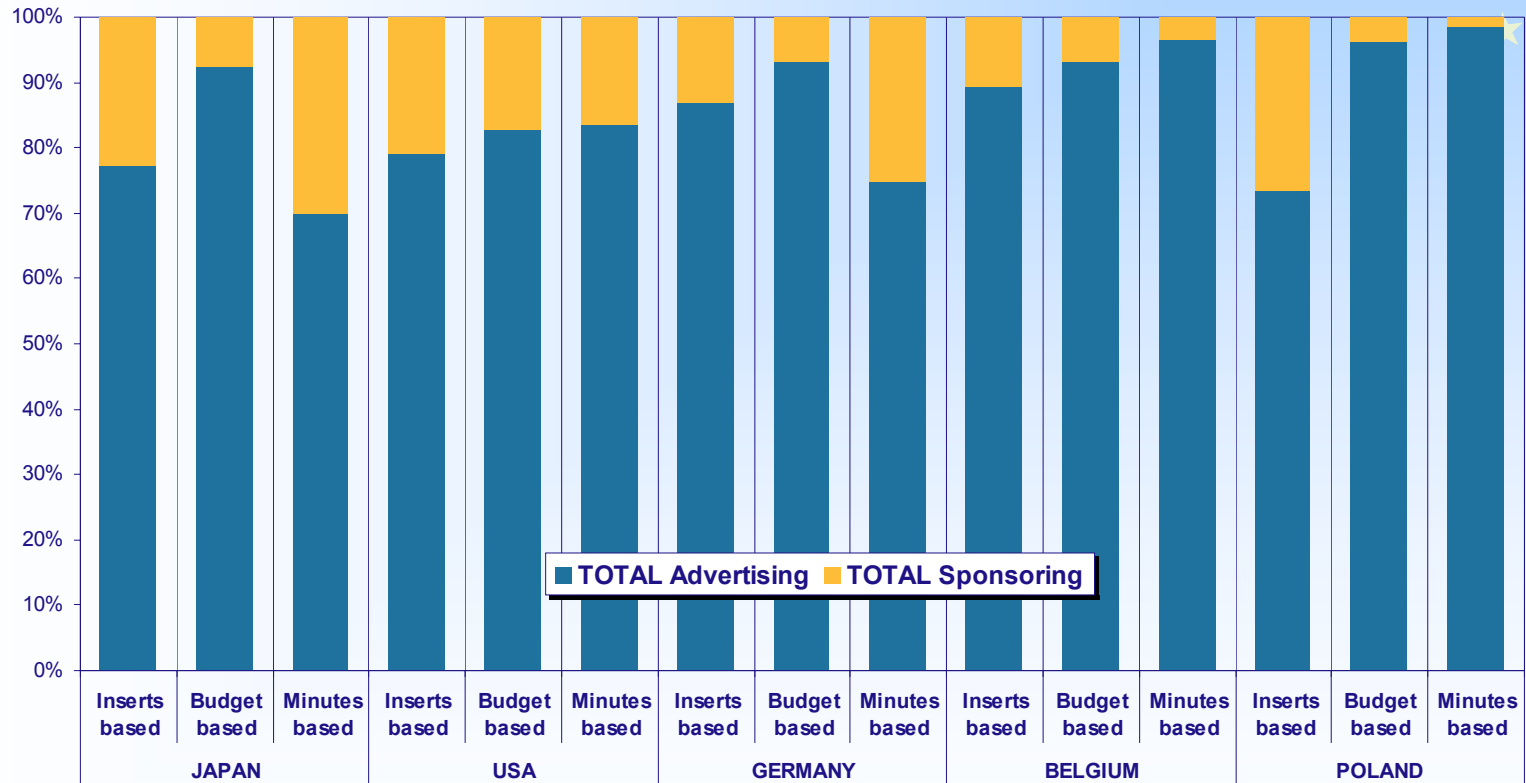
- Withdrawal of the 30 min rule (Art. 11.5) ?  
→ prohibition of interruptions in protected programmes whatever their duration
- Withdrawal of the Article 11.2 specific rule ?
  - ↳ Article 11.1 = principle
  - ↳ Keeping the 20 min rule (Art. 11.4) or substitution by a maximum number of interruptions per hour ?

# Sponsoring Economic data



## Market situation

Share of sponsoring spots - a few markets



# Sponsoring Legal data

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- SPONSORING ≠ TELEVISED ADVERTISING
  - ≠ INSERTION RULES
  - NOT INCLUDED WITHIN THE MAX. ADVERTISING VOLUME

# Sponsoring Questions

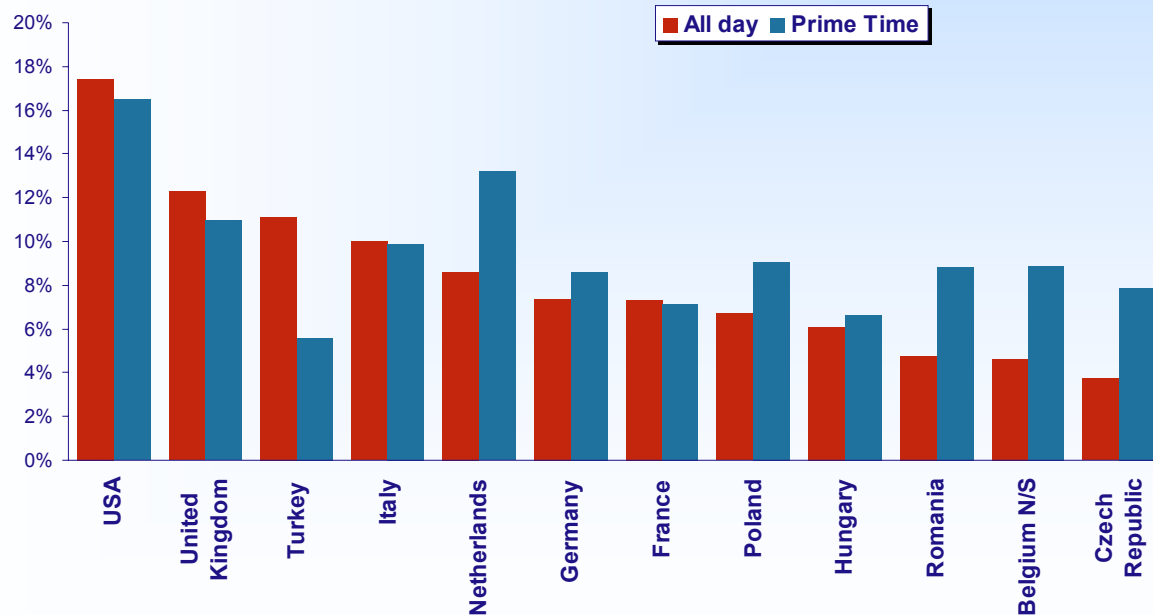
1. THE EVOLUTION OF SPONSORING DEFINITION ?
  - ISSUES
    - Quantitative rules
    - Insertion rules
2. CALCULATION OF THE TIME DEVOTED TO SPONSORING ?
  - = SELF-PROMOTION ?
  - INCLUDED IN THE MAXIMUM VOLUME OF ADVERTISING ? WITH INCREASE OF THE ADVERTISING VOLUME ?
3. APPEARANCE OF THE AUTHORIZED SPONSOR:
  - BEFORE/ DURING /AFTER THE BROADCAST?
  - LOGO, TRADE MARK, NAME ?
  - PRODUCTS / SERVICES ?
4. MIN/ MAX. DURATION OF THE SPONSOR'S APPEARANCE?

# Quantitative restrictions

## Economic data

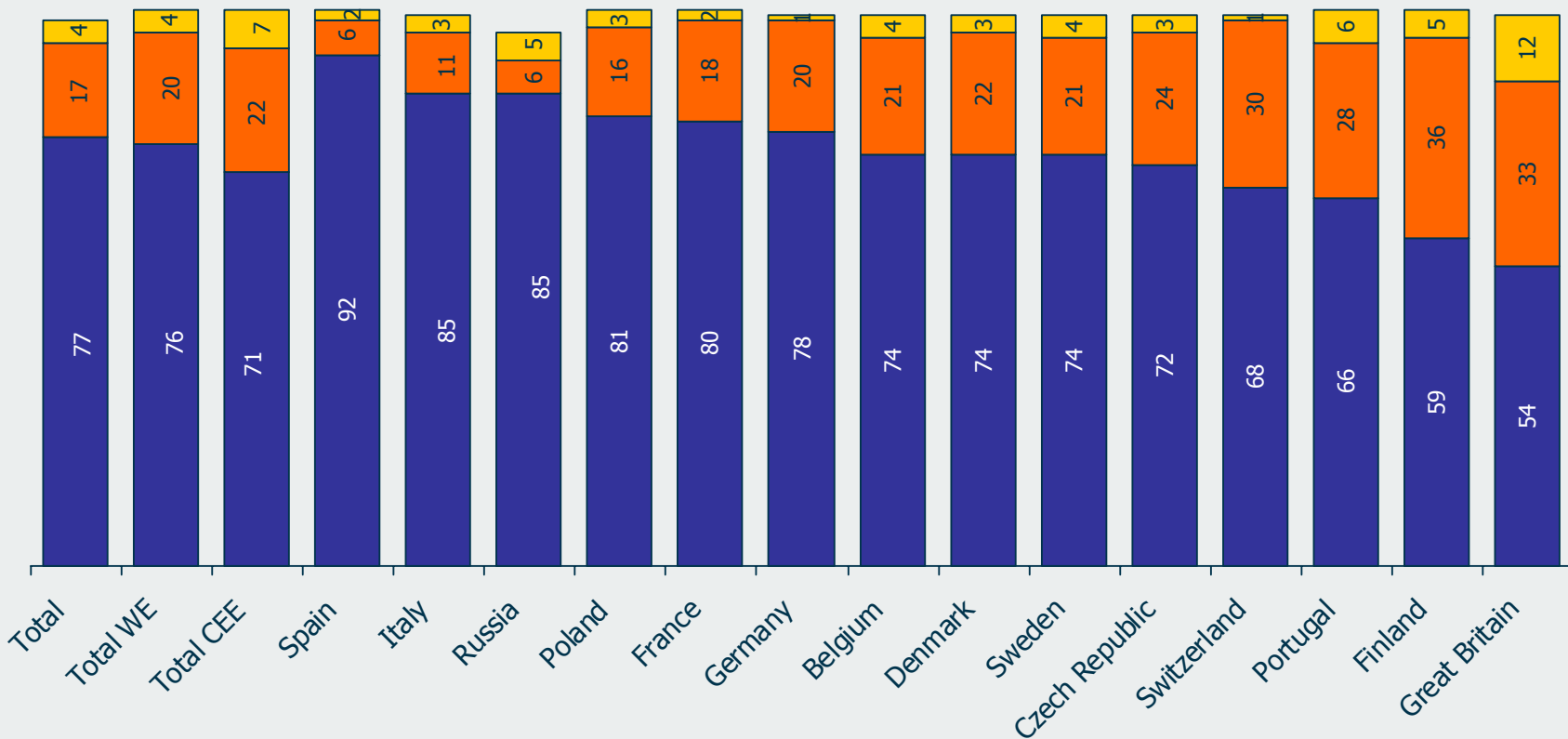
- THE MEASUREMENT OF THE ADVERTISING PRESSURE BY REFERENCE : 4 CRITERIA :
  - ADVERTISING VOLUME
  - BREAKS DURATION
  - BREAKS FREQUENCY
  - NUMBER OF ADVERTS SPOTS WITHIN A GIVEN BREAK
- THE **NON SATURATION** OF THE EUROPEAN MARKET (all day)

Total Advertising (incl. Sponsoring)



**Consumer's Insight** : What do you think: Is there too much advertising? Is there exactly the right amount of advertising? Or do you think there could be even more advertising without it becoming a nuisance?

The viewers' point of view...



- there could be even more advertising and it wouldn't bother me
- there is exactly the right amount of advertising
- there is too much advertising

# Quantitative restrictions

## Questions

1. DAILY VOLUME : 15% → 20% ?
  - (No identification of teleshopping spots and other advertising forms)★
2. NEED TO REGULATE THE DURATION OF THE BREAKS (PRIME TIME)
  - (Minimum duration ?                      Maximum duration ?                      Isolated advertising ?)
3. NEED TO REGULATE THE MAXIMUM NUMBER OF ADVERTISING SPOTS (prime time) WITHIN A GIVEN ADVERTISING BREAK?

# Quantitative restrictions

## Questions (part 2)

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4. TEleshopping SPOTS → 18 bis ?

5. RELEVANCE OF QUANTITATIVE RESTRICTIONS FOR  
TEleshopping CHANNELS? (Art. 19)

# Children's protection

## Legal data

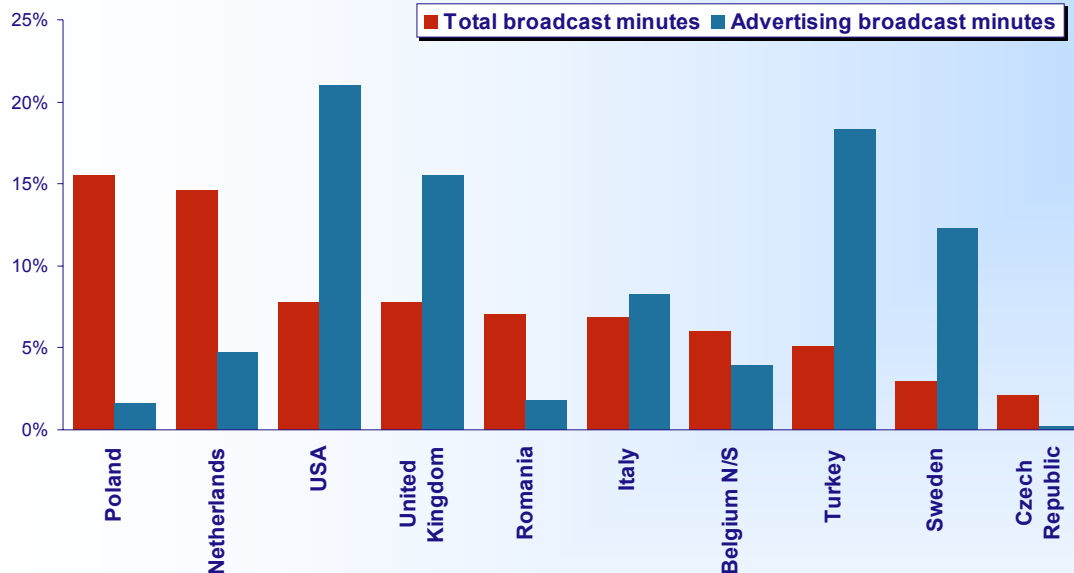
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- TWF DIRECTIVE (Art. 16 + Art. 11.5 + Art. 15)
- 'CHILDREN' : NO UNIFORM DEFINITION
- 'CHILDREN'S PROGRAMMES' : NO DEFINITION
- 'PRODUCTS AIMED AT CHILDREN' : NO DEFINITION

# Children's protection

## Economic data

Focus on specific groups : Children



- Proportion of the programmes dedicated to children
- Proportion of the advertising dedicated to children by reference to products addressed to them

# Children's protection

## Questions

- RELEVANCE AND NEED FOR A DEFINITION OF 'CHILDREN', 'CHILDREN'S PROGRAMMES', 'ADVERTISING AIMED AT CHILDREN'
- RELEVANCE AND NEED FOR A DEFINITION OF 'PRODUCTS AIMED AT CHILDREN'
- FAILURE A EUROPEAN DEFINITION:
  - IDENTICAL CRITERIA → NATIONAL DEFINITION ?

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*Presentation of the study*

ANSWERS TO BE RETURNED TO:

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