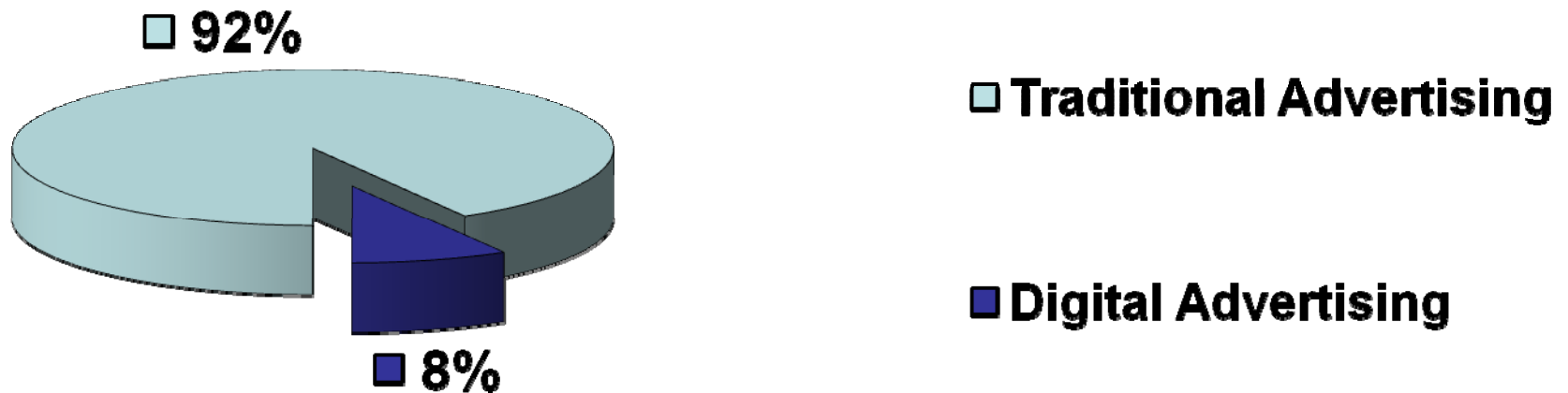


Spread & Volume of Marketing Communications

Presentation to Alcohol Forum
Marketing Communications Task Force
4 March 2008

European Advertising Market 2006

€ 90 billion

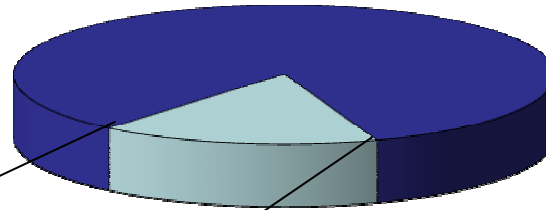


Source: WARC, IAB

Traditional Advertising Market Size €

2005
€ 85 billion

- Food, Cars, Alcohol
- Other Advertising



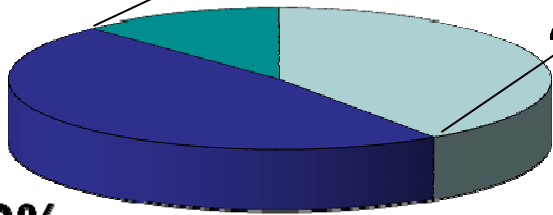
12%

40%

- Cars
- Food
- Alcohol

48%

2005
17%

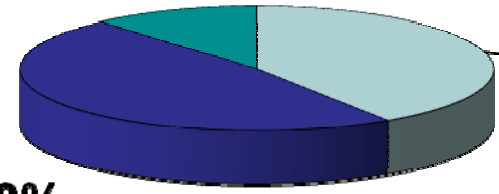


11%

41%

48%

2006:
+ 0.008%

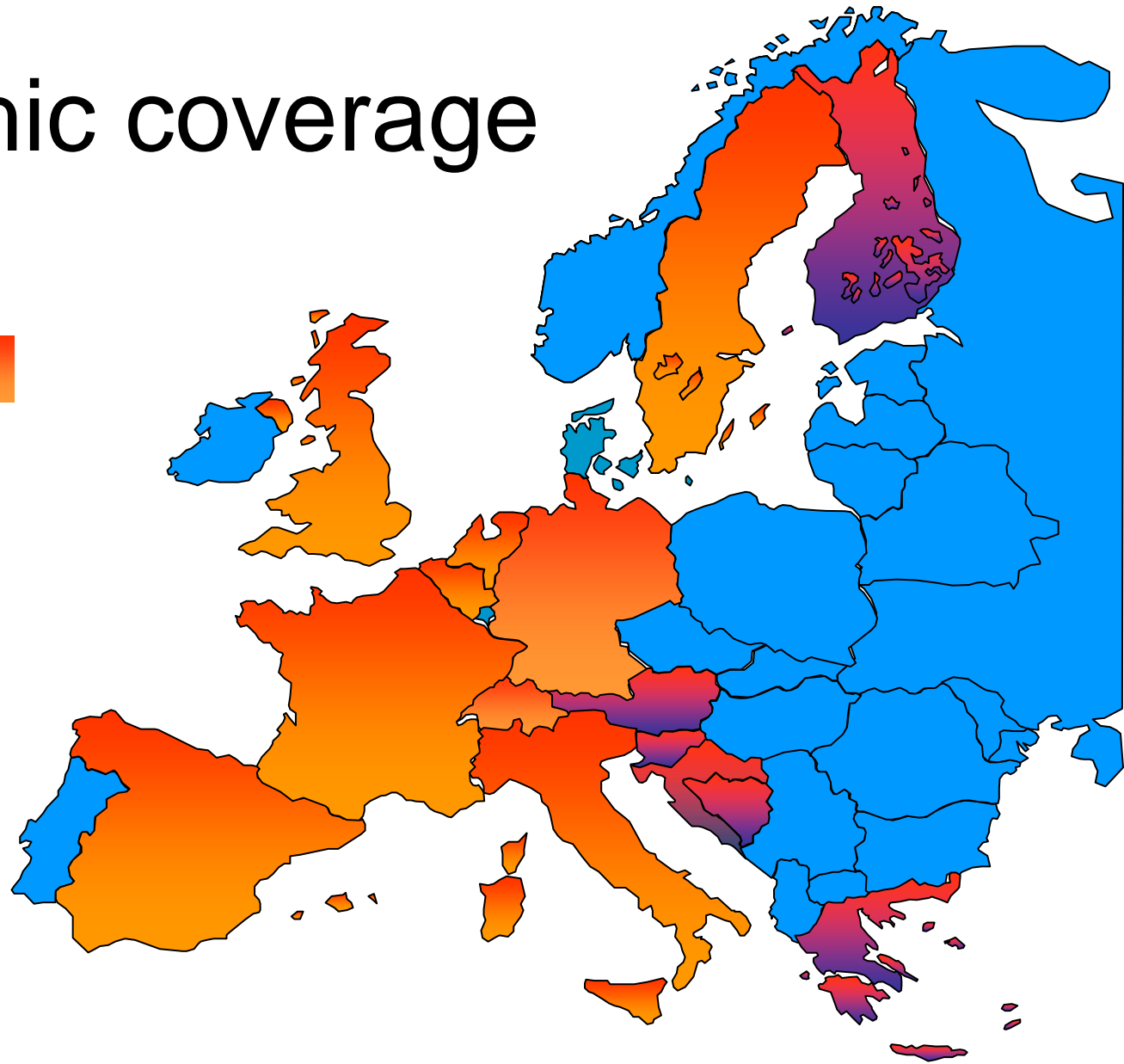


Geographic coverage

Traditional media

+

Digital media



Alcoholic Drinks Advertising spend

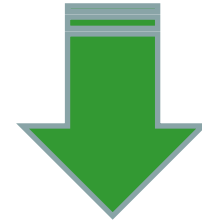
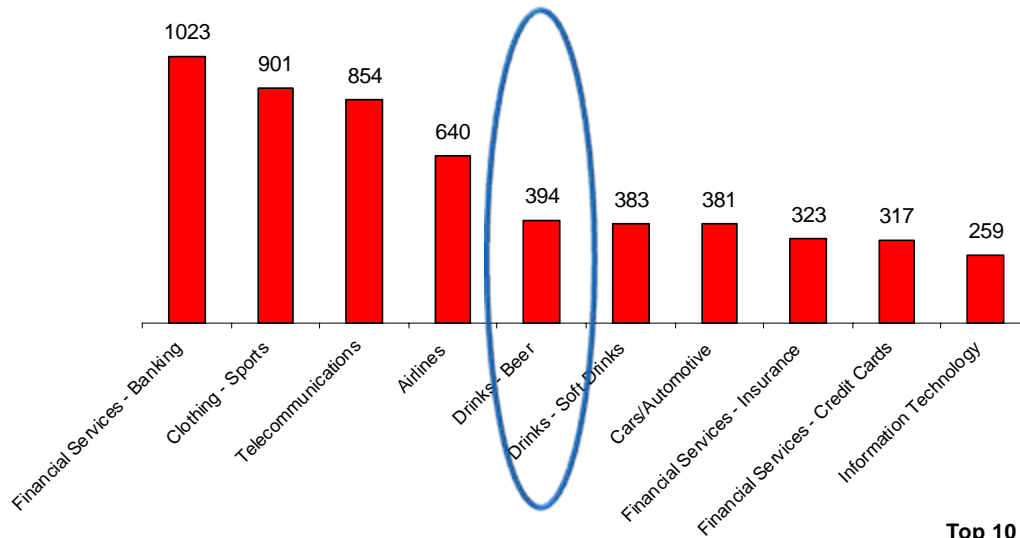
€ million

	Television	Newspapers	Magazines	Outdoor	Radio	Cinema	Total
Total 2005	928.32	142.85	222.54	298.64	116.96	46.25	1755.56
Total 2006	844.90	150.18	200.87	314.11	124.48	42.65	1677.19
Total 2007	856.81	136.31	142.38	195.03	87.46	40.40	1458.39

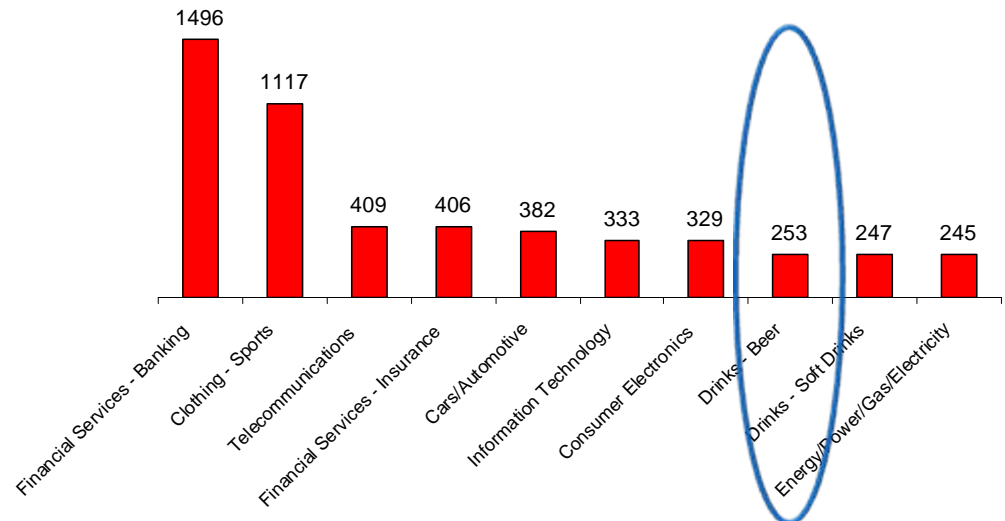


The World Sponsorship Monitor

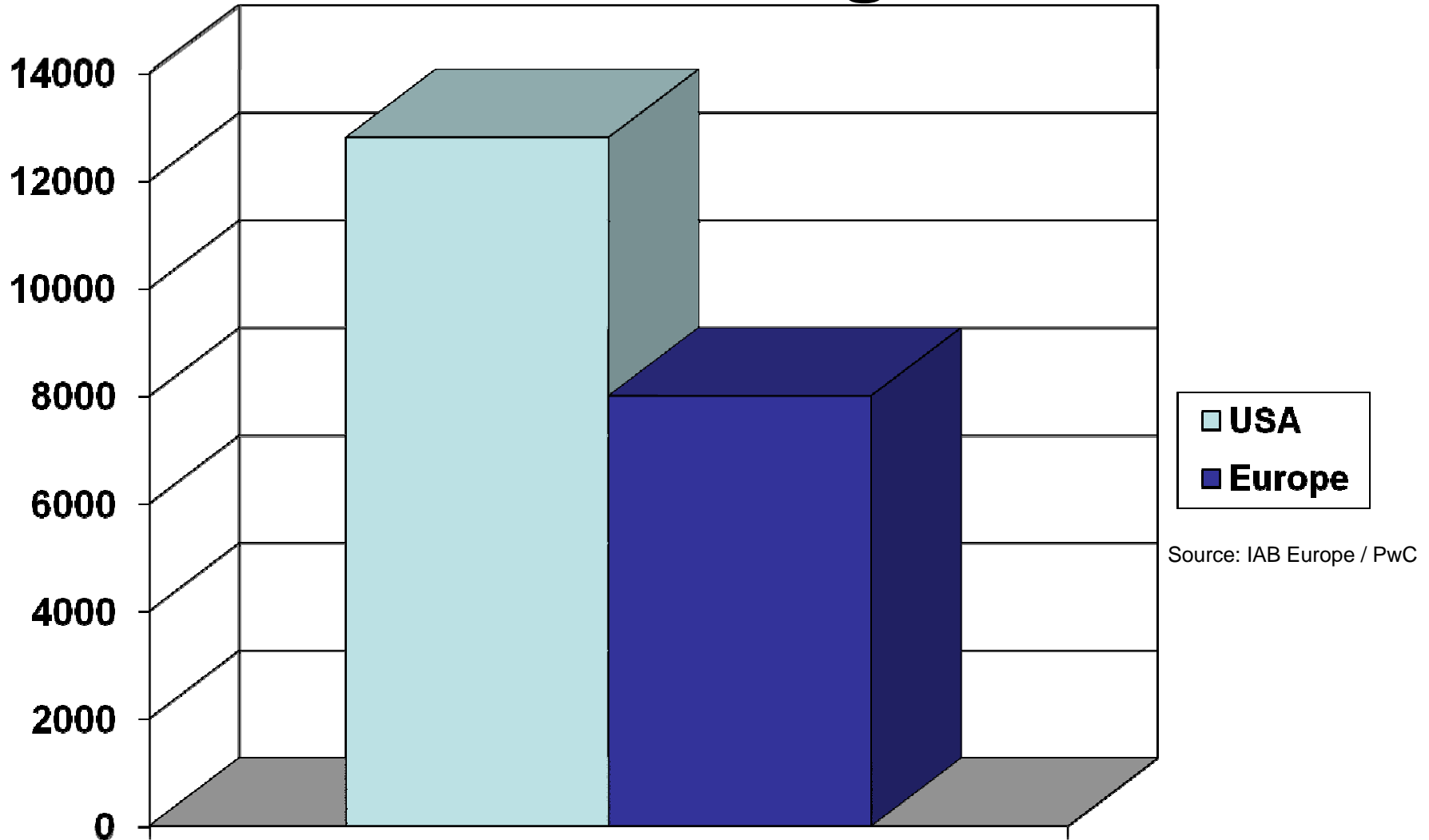
Top 10 Spending Industries in Total Reported Value 2006 \$m.



Top 10 Spending Industries in Total Reported Value 2007 \$m.

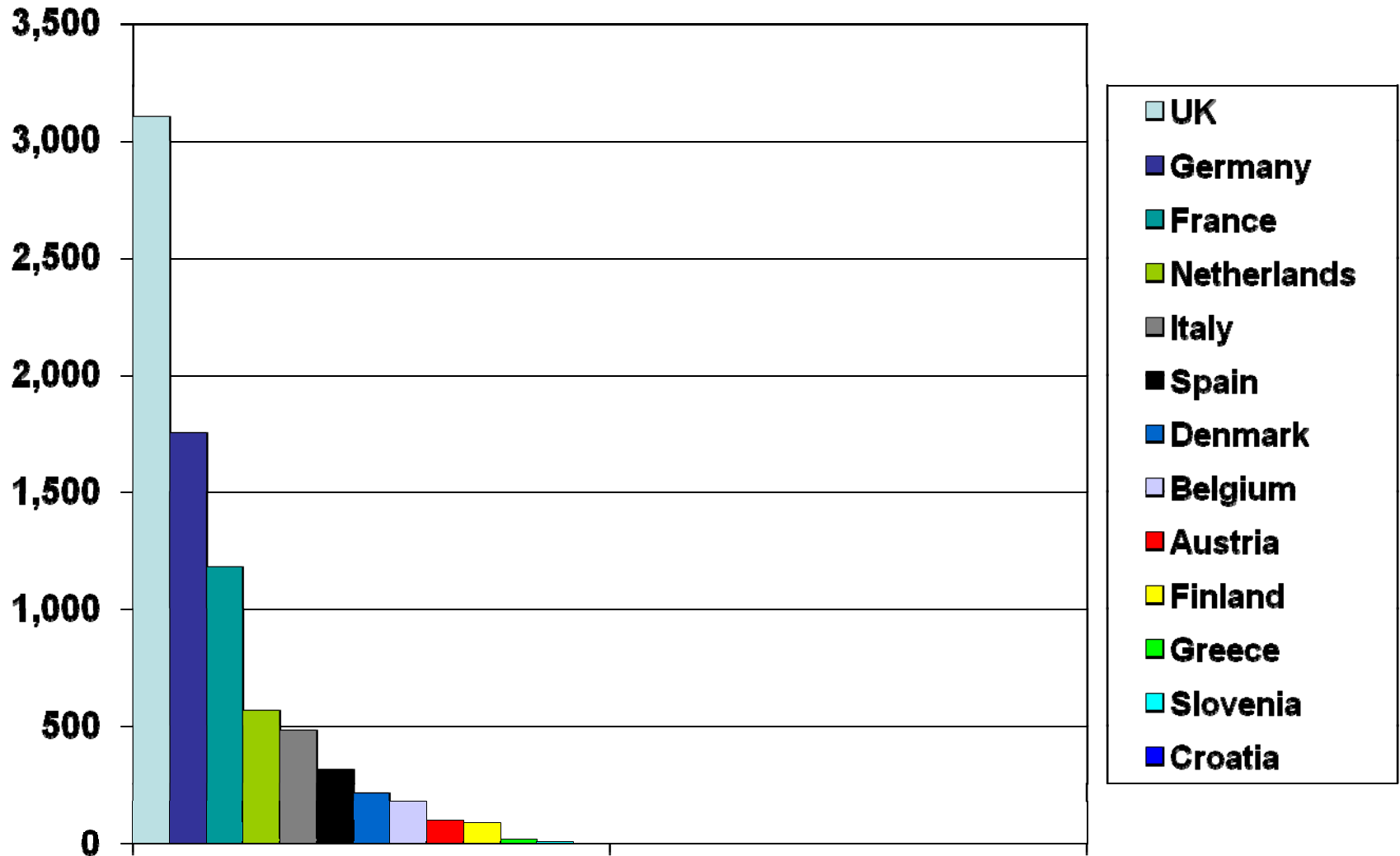


2006 Total Market Value Internet Advertising €000

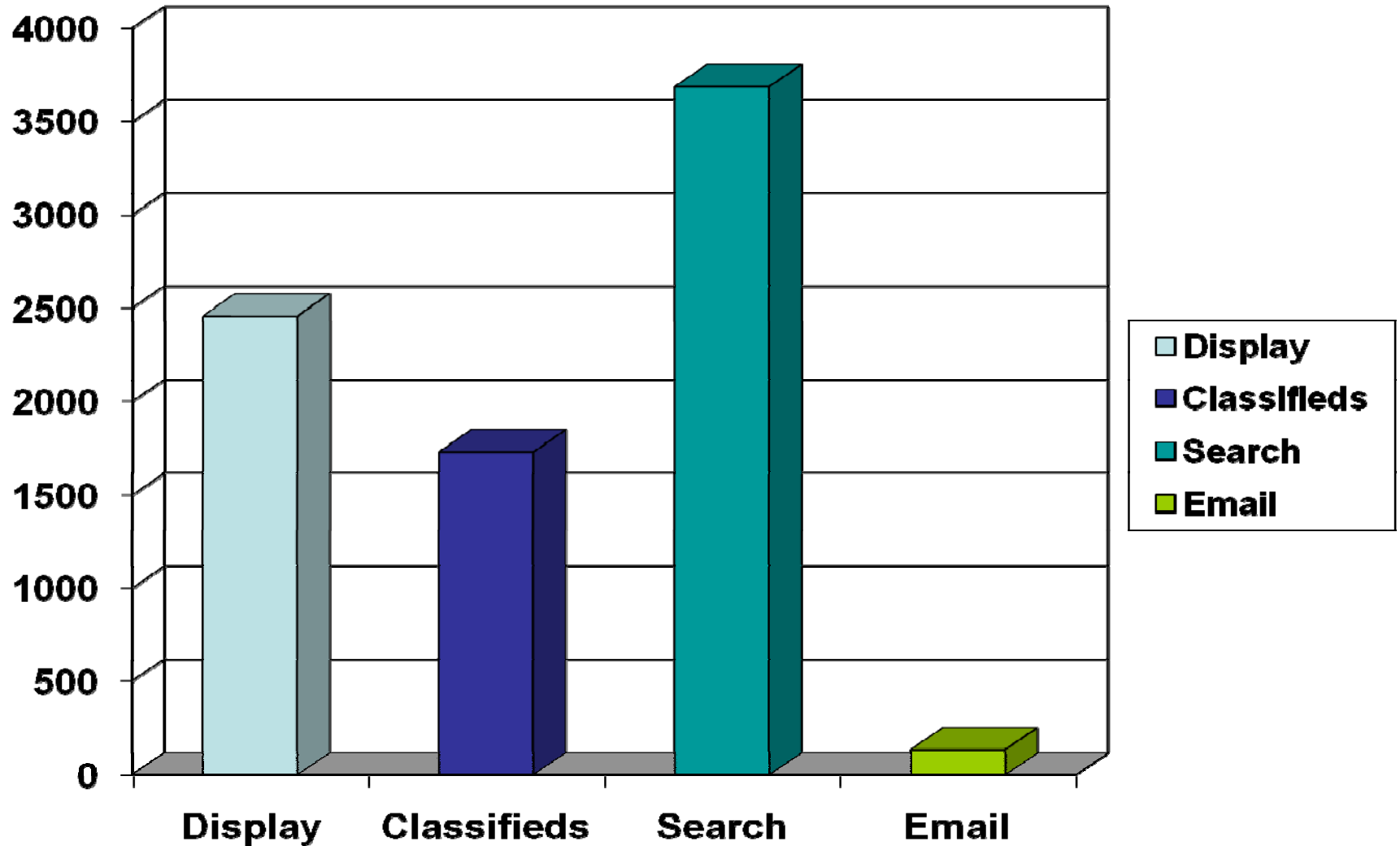


Source: IAB Europe / PwC

2006 Total Market Value Internet Advertising €billion



Digital Advertising Market

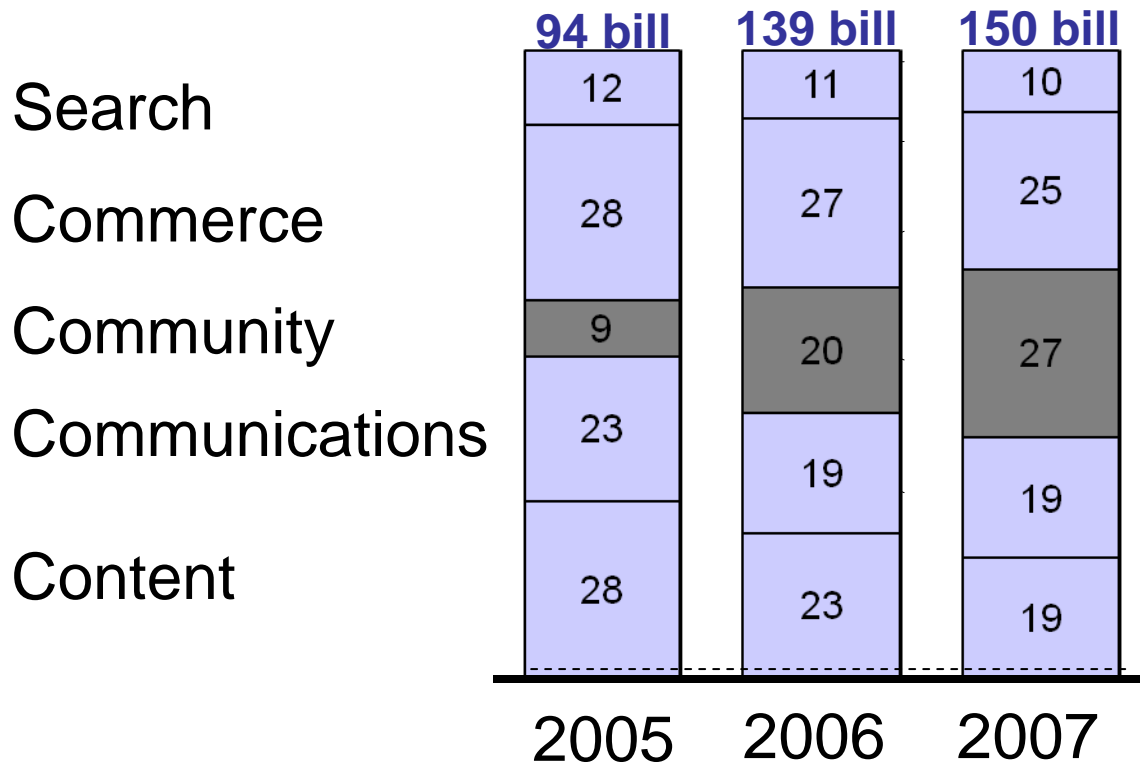


Internet Ad Expenditure Alcoholic Drinks

US \$ '000	UK	GERMANY	ITALY
2005	2.613	2.171	999
2006	3.426	2.698	1.543
+ 33%	+ 31.1%	+ 24.3%	+54.4%

Community Groups growing dramatically

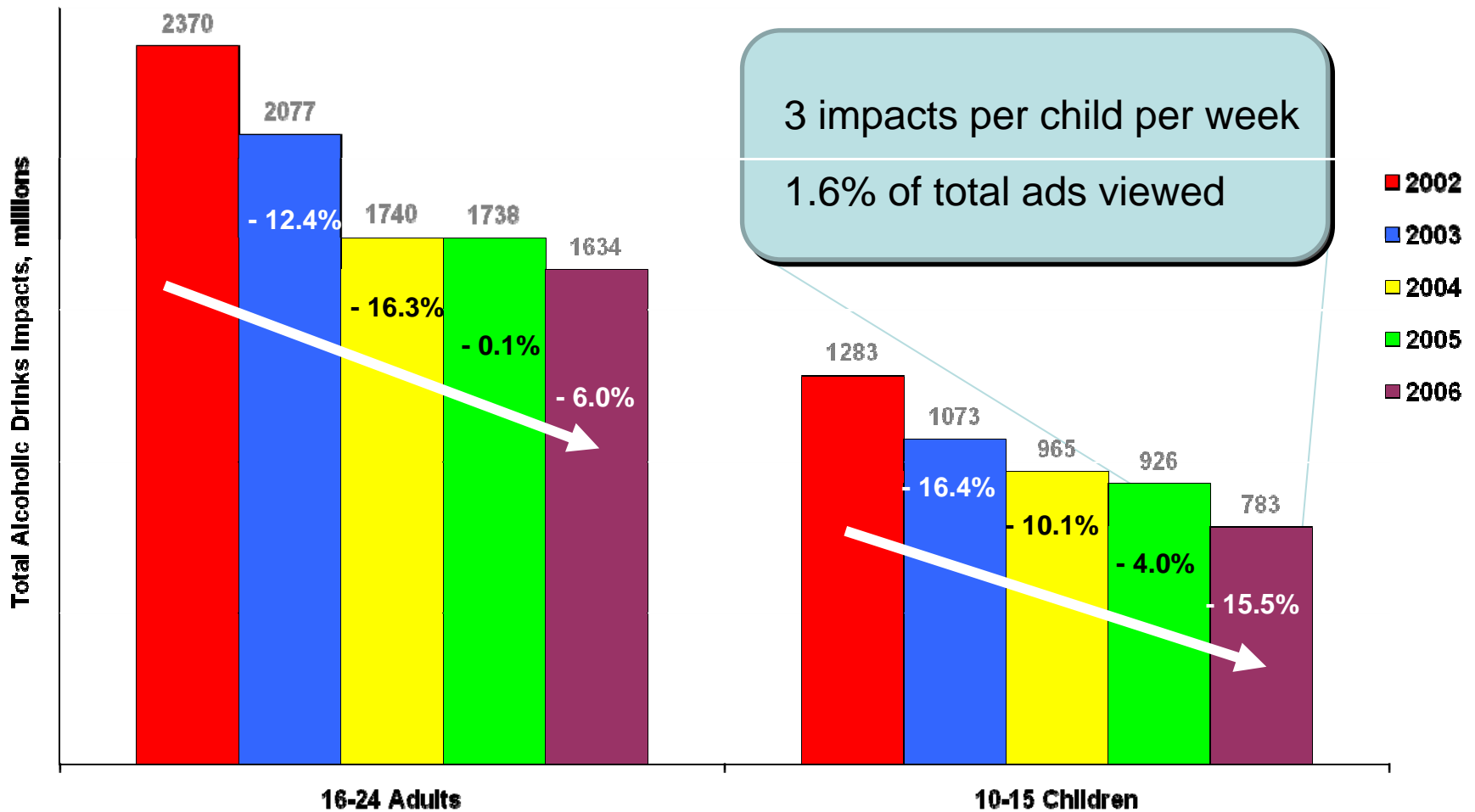
Pageviews, among top 100 properties



Analysis: McKinsey
Data Source: Nielsen//Netratings

Exposure to Advertising - UK

Total alcoholic drinks commercial Impacts : millions/year



Digital Complaints 2007 - UK

- 2,144 complaints re content of 2,116 websites
- 94% from members of the public
- Alcohol didn't feature in the top 10 sectors
- Only 4 alcohol complaints (about the content of four different sites)
 - 1 related to responsibility
 - 3 about general issues (1 offence; 2 pricing).
- So as far as alcohol is concerned, websites aimed at/appealing to children are not an issue with ASA complainants

This paper was produced for a meeting organized by Health & Consumer Protection DG and represents the views of its author on the subject. These views have not been adopted or in any way approved by the Commission and should not be relied upon as a statement of the Commission's or Health & Consumer Protection DG's views. The European Commission does not guarantee the accuracy of the data included in this paper, nor does it accept responsibility for any use made thereof.