

# Advertising spend insights for the Advertising Standards Canada

April 29, 2009

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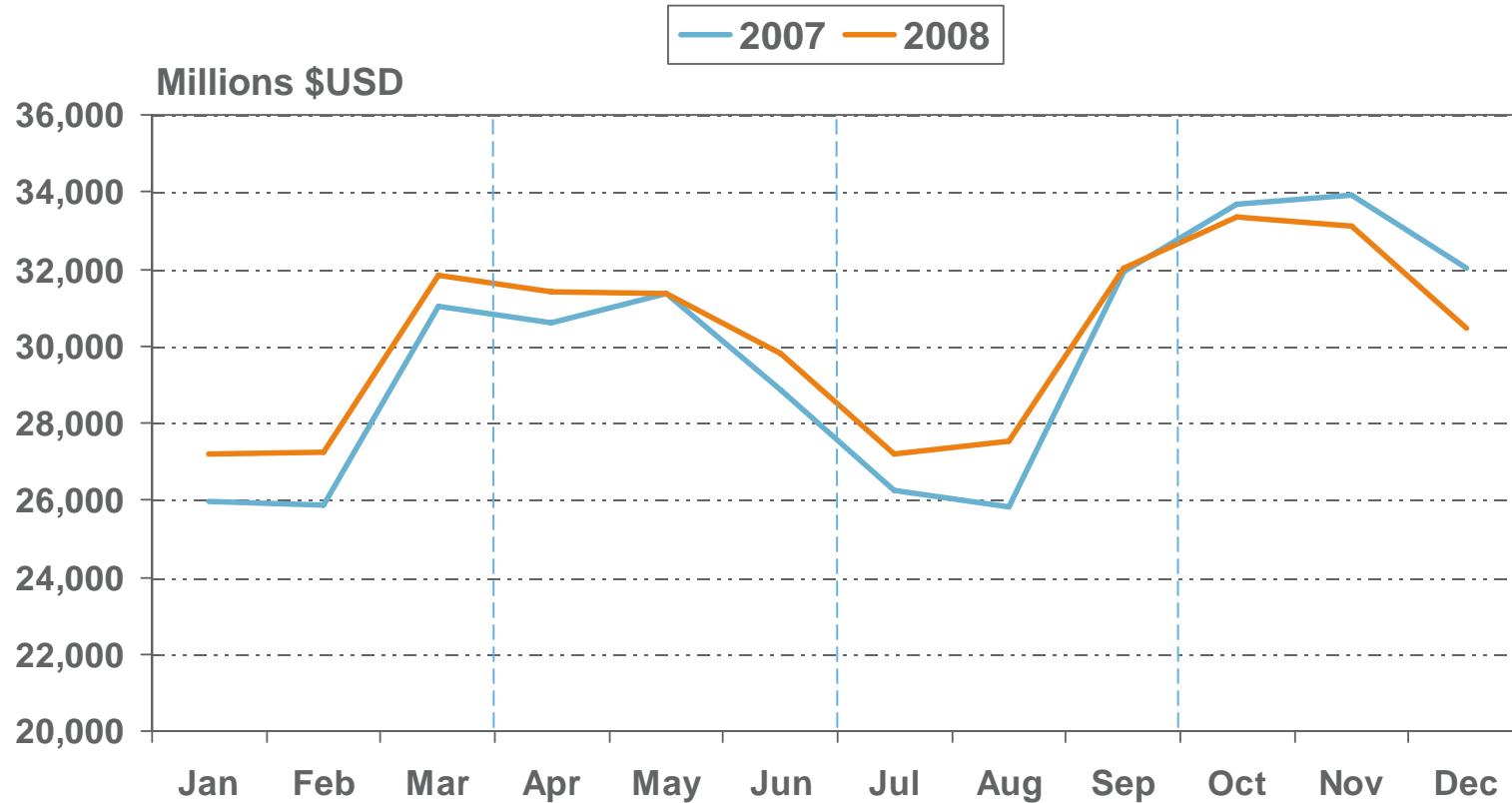
Media Canada



# World Context

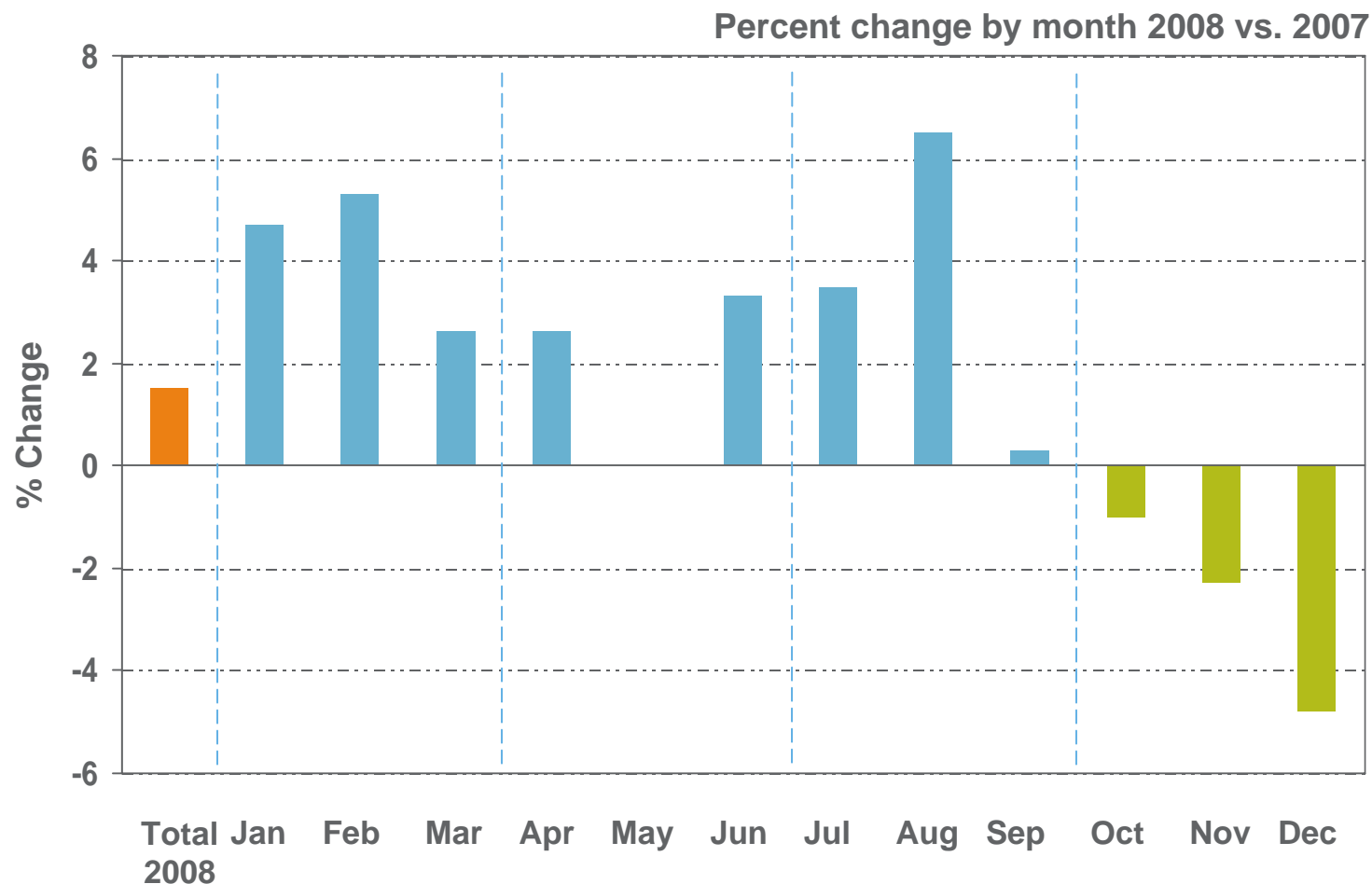


# 2008 closes: small increase of ad spend 1.5 percent versus 2007



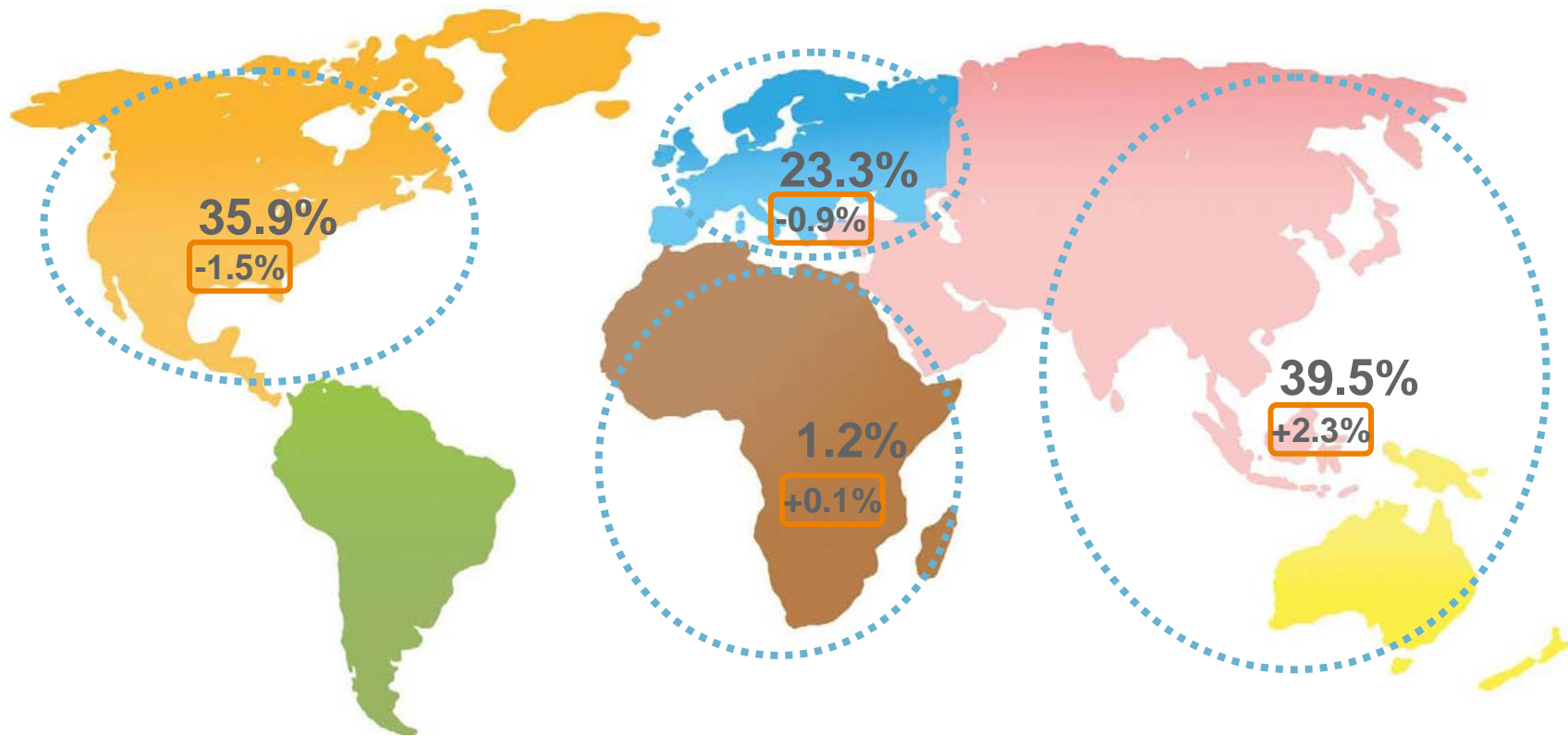
The Nielsen Company US, Global Ad\*View Pulse, Quarter 4, 2008, TV, newspapers, magazines and radio

# Globally, the economic downturn became evident during the last three months of 2008



The Nielsen Company US, Global Ad\*View Pulse, Quarter 4, 2008, TV, newspapers, magazines and radio

# 2008 global advertising expenditure share by region

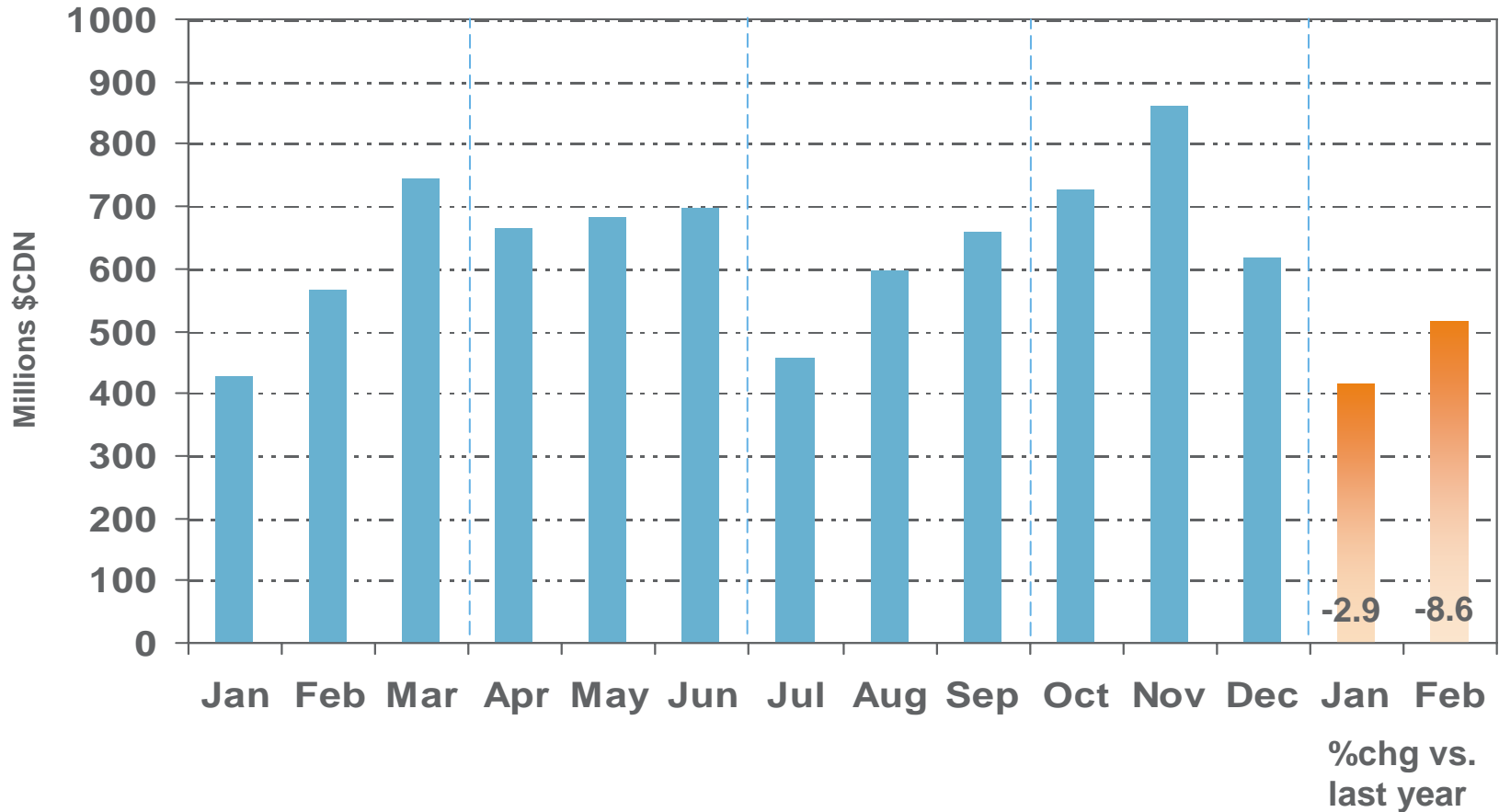


The Nielsen Company US, Global Ad\*View Pulse, Quarter 4, 2008, TV, newspapers, magazines and radio



# **Canadian advertising expenditure trends**

# Ad spend declined by 6.1% during the first two months of 2009



The Nielsen Company, Advertising Expenditures TTL, TV, newspapers, magazines, radio and OOH

# Ad Spend has dipped for all media at the start of the year

Dates	Newspaper Daily	Magazine	OOH	Radio	TV
<b>Canada</b>	\$(000)	\$(000)	\$(000)	\$(000)	\$(000)
Jan – Feb 2009	290.3	64.5	52.5	72.9*	452.1
Jan – Feb 2008	323.4	74.0	60.0	65.2	470.8
<b>%Chg 2009 vs. 2008</b>	<b>-10.2</b>	<b>-12.8</b>	<b>-12.5</b>	<b>+11.8*</b>	<b>-4.0</b>
2008 TTL %Share of Media	30.8	9.6	7.0	7.4	45.2
Estimated coverage increase*				14.1	
Revised %Chg 2009 vs. 2008				-9.8	
<b>Global</b>					
%Chg 2008 vs. 2007	-2.8	-6.3	NA	+0.4	+5.2

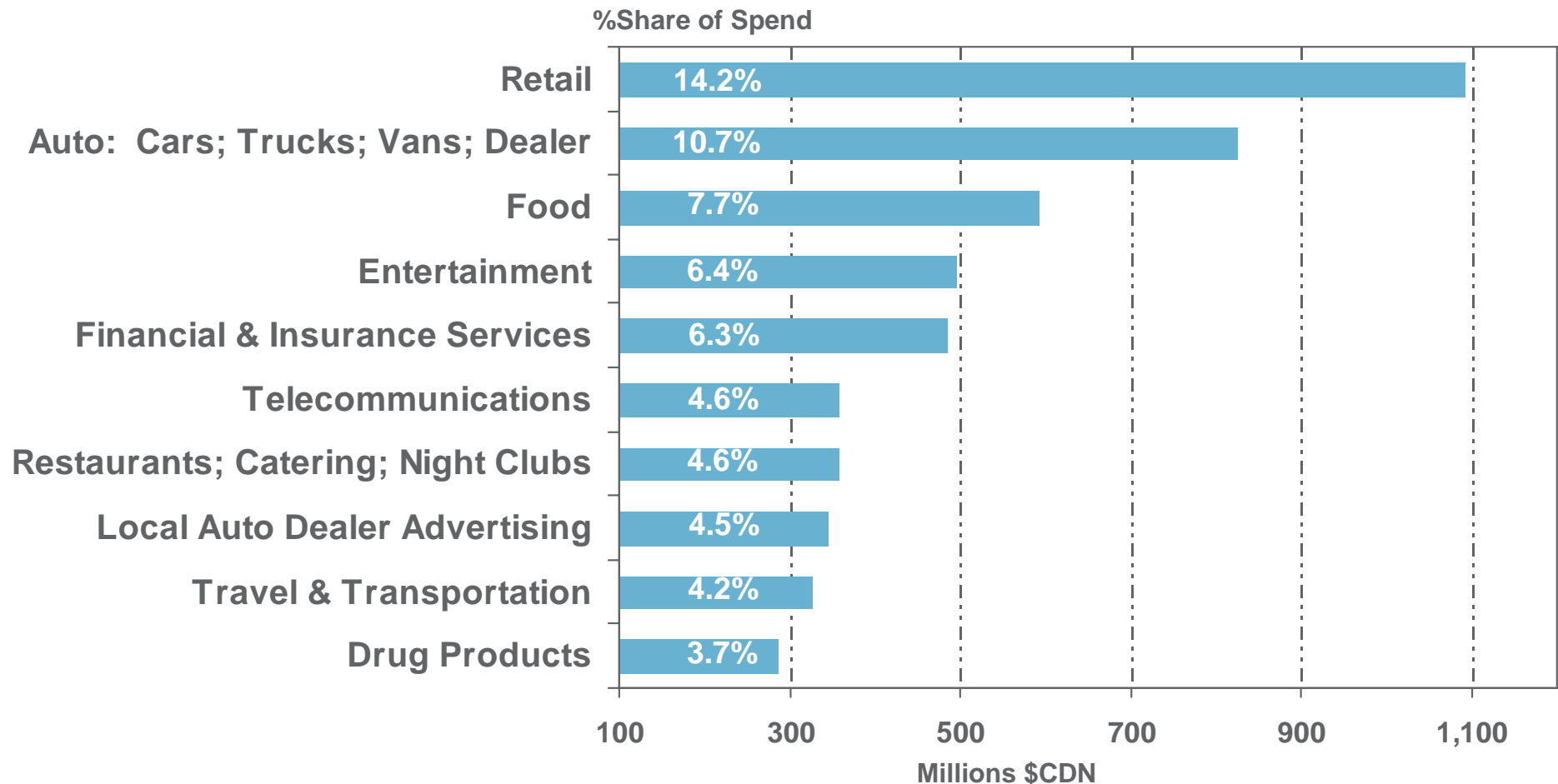
The Nielsen Company, Advertising Expenditures

\*increase coverage in Montreal as of Sept 2008



# **Canadian Ad Expenditure vs ASC areas of interest**

# The top ten ad spending categories represent over 70 percent of 2008 spend activity



The Nielsen Company, Advertising Expenditures 2008 TTL, TV, newspapers, magazines, radio and OOH

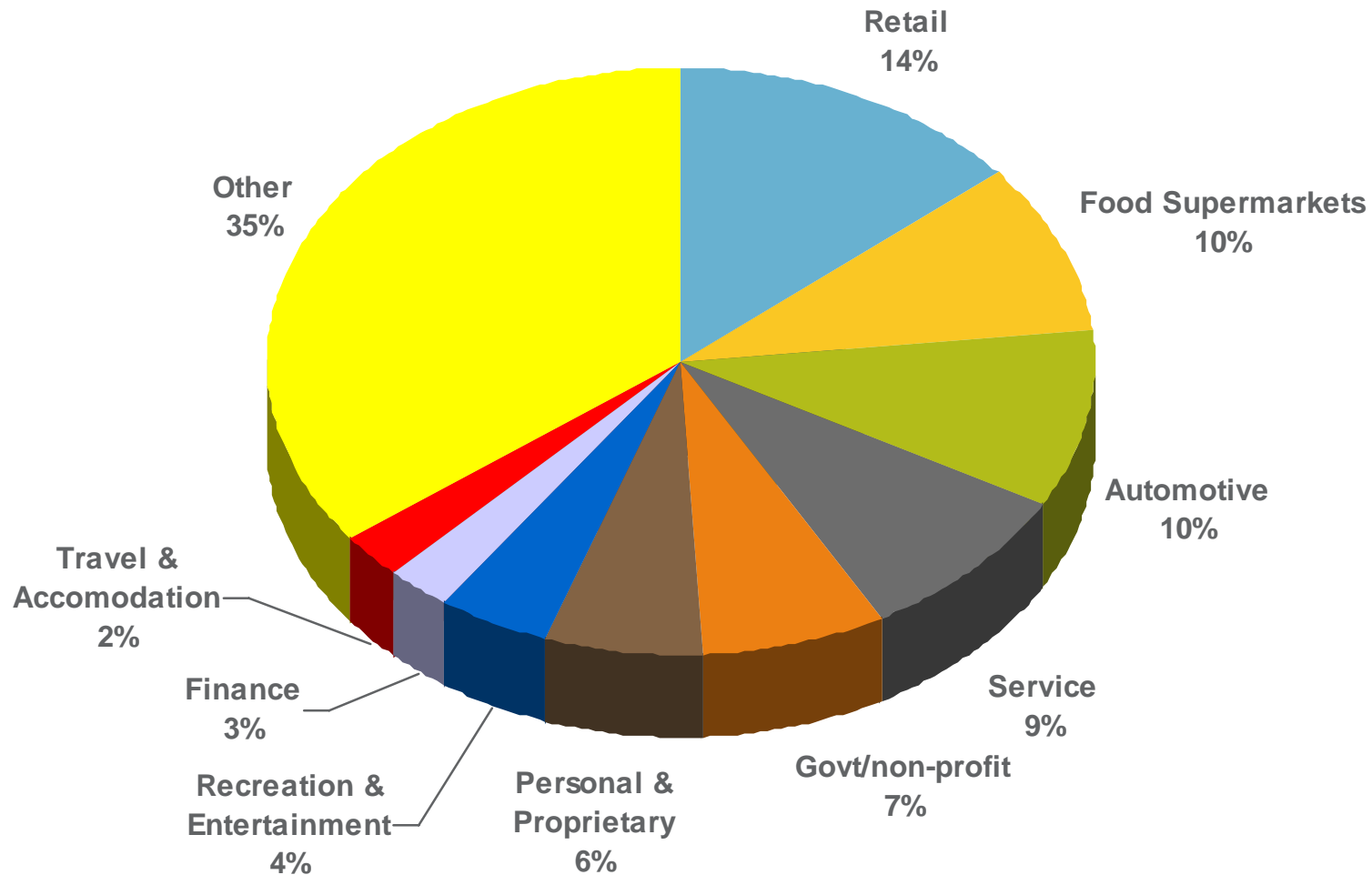
# 2008 Canadian ad spend in categories of interest for external regulation

Rank	Category	%Share of Total Ad Spend
1	Auto: Car, Minivan, Truck, Van, Dealer and Local Dealer	15.2
2	Retail	14.2
3	Food	7.7
10	Drug Products	3.7
11	Cosmetic and Toiletry	3.4
15	Alcohol & Related Beverages	1.9

<b>Total</b>	<b>46.1</b>
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Source: The Nielsen Company, Advertising Expenditures

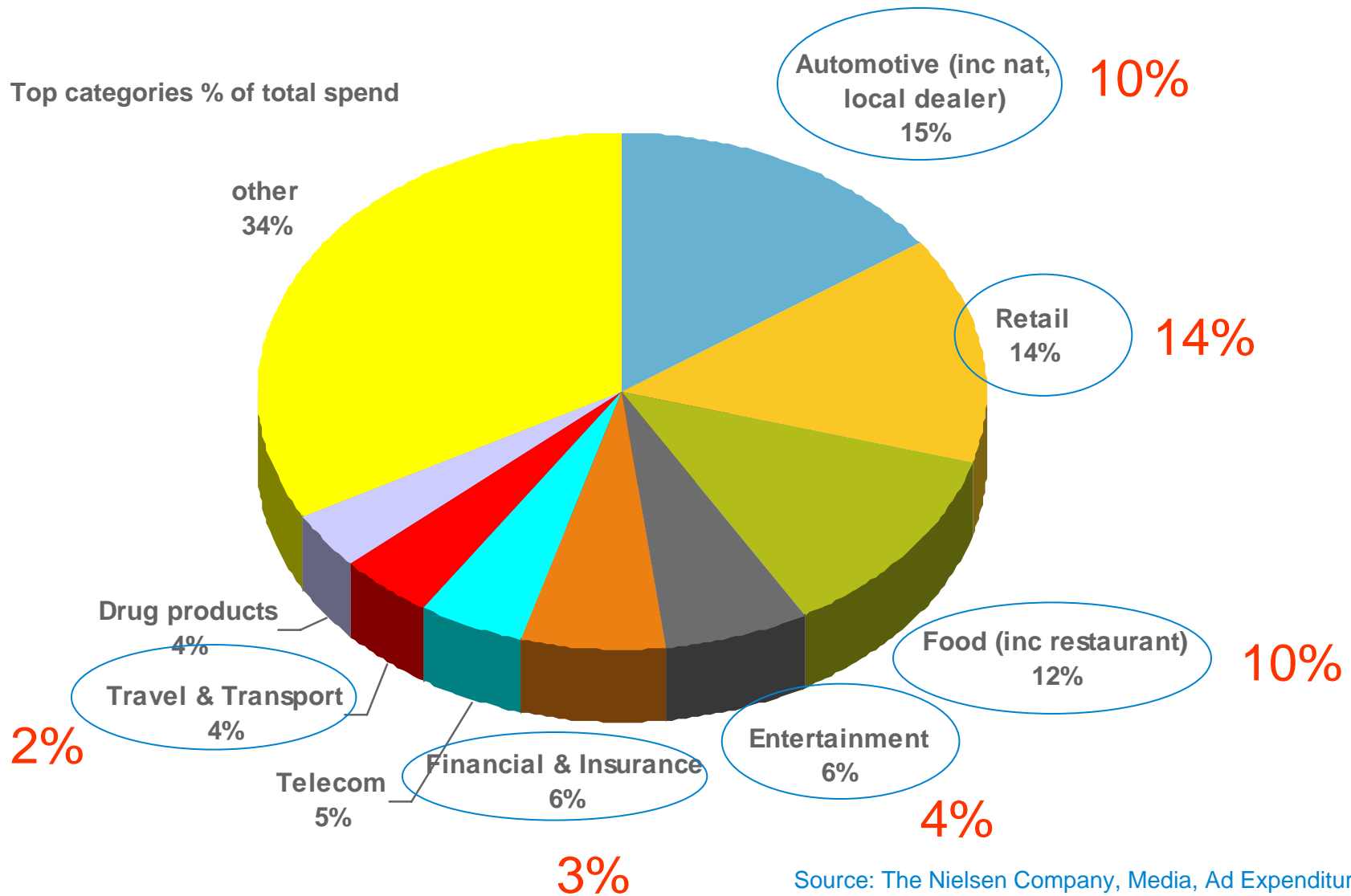
# 2008 ASC Complaints by Ad Category



Source: ASC Ad Complaints Report 2008 Year in Review

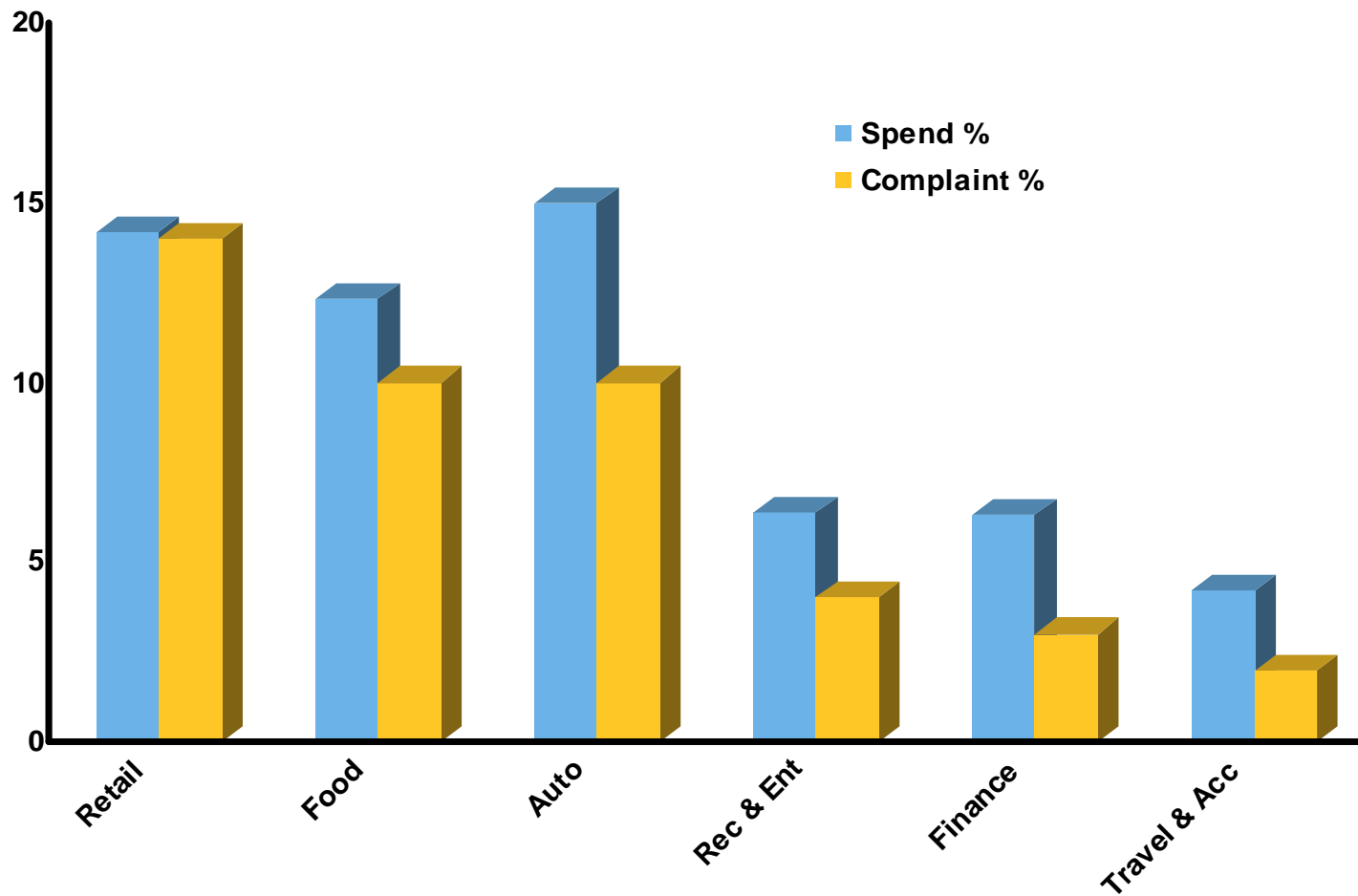
# ASC complaints are proportional to ad spend

Top categories % of total spend



Source: The Nielsen Company, Media, Ad Expenditures 2008

# Percentage Ad spend vs complaints



Source: The Nielsen Company, Media, Ad Expenditures 2008

## In conclusion...

- Global ad spend is down overall although not in all regions
- Canada total ad spend is declining for first two months of 2009
- Impact varies by category and media
- ASC complaints are relatively proportional to ad spend

Thank you

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