

FIGURES ON TV ADVERTISING INVESTMENTS COMING FROM THE ALCOHOL INDUSTRY

The figures below give an overview of the proportion of TV advertising investments coming from the alcohol industry. In particular:

- The first chart highlights the weight represented by the alcohol sector in the traditional advertising market in 2005 and 2006. Regarding television (chart number 2), investments coming from alcoholic drinks in Europe reached the total amount of around 800 million Euros, showing a declining trend from the previous years.
- Investments in TV advertising coming from the alcohol industry represent from 0.4 to 5.8 of the total TV ad revenues. Advertising represents a very relevant source of revenue for the broadcast industry. In 2007 in Italy the alcohol industry invested more than 400 million of Euros in TV advertising. It must also be noted that the weight of TV in the media mix is high for all the countries analysed (going up to 88.60 in Bulgaria).
- Advertising represents 90% of private broadcasters' income and nearly 30% of that of public broadcasters (European Audiovisual Observatory data). Advertising is thus one of the primary sources of investment in audiovisual content and is key in guaranteeing citizens' free access to a variety of television programmes.

Chart 1. All media ad spend in Europe and the share represented by specific industries (million of Euros)

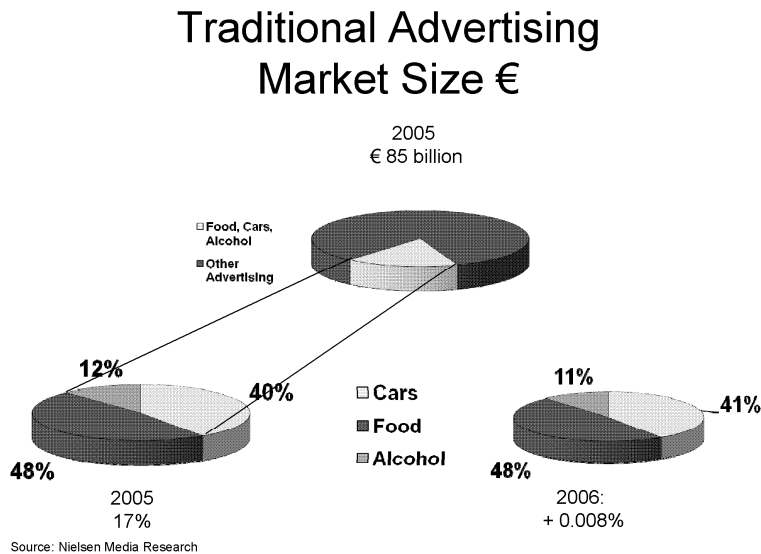


Table 1 - TV ad spend from the alcohol sector in Europe (million of Euros)

Source: EACA

Year	TV ad spend (million Euros)	Ad spend on all media (million Euros)
2005	928.32	1755.56
2006	844.90	1677.19
2007	856.81	1458.39

Table 2 - Alcohol sector ad spend on Television in EU countries covered by egta membership (2008 data)

Source: egta database

Country	% of TV investments	Weight of TV in the media mix (%)	Amount of TV ad spend (Euro)
Austria	1.4	42.2	8,614,729
Belgium North	1.7	44.2	13,543,661
Belgium South	1.3	29.6	5,551,953
Bulgaria	5.6	88.6	22,802,948
Czech Republic	1.2	80.6	12,230,160
Denmark	1.7	31.6	10,367,758
Estonia	n.a.	n.a.	n.a.
Finland (1)	1.2	31	3,280,000
France (2)	-----	-----	-----
Germany	4.0	65.9	367,277,308
Hungary	2.9	85.0	42,177,134
Ireland (2)	5.8	34.0	21,174,735
Italy (3)	3.5	60.4	417,819,000
Latvia	n.a.	n.a.	n.a.
Lithuania	2.4	57.4	9,290,962
Netherlands(2)	1.7	69.5	53,702,423
Poland	2.3	77.3	74,549,259
Romania	0.6	n.a	389,370,000
Slovenia	0.4	n.a	1,186,628
Spain	n.a.	n.a.	n.a.
Sweden	1.3	51.3	19,700,000

(1) Please note that the figure for Finland is net

(2) In France alcohol advertising on TV is prohibited by law. In some other countries, such as Finland, Ireland and the Netherlands, although there is a general availability for alcohol advertising on TV, restrictions are in place concerning the type of programme where the advert is broadcast or the time of broadcast (in the Netherlands, for example, alcohol advertising cannot be broadcast on TV before 9pm).

(3) Data from 2007