

Advertising Standards Authority
NEW ZEALAND ADVERTISING INDUSTRY TURNOVER

DECEMBER 2009 YEAR END

	2000		2001		2002		2003		2004		2005		2006		2007		2008		2009	
	\$ M	%	\$ M	%	\$ M	%	\$ M	%	\$ M	%	\$ M	%	\$ M	%	\$ M	%	\$ M	%	\$ M	%
NEWSPAPERS	596	40.1	606	40.7	628	40.1	689	37.1	790	38.1	830	37.2	810	36.4	826	35.4	760	32.8	623	30.5
TELEVISION	501	33.7	479	32.2	516	33.0	592	31.9	643	31.0	666	29.9	641	28.8	654	28.0	647	27.9	570	27.9
RADIO	190	12.8	196	13.2	203	13.0	224	12.1	247	11.9	256	11.5	269	12.1	274	11.7	268	11.6	236	11.5
MAGAZINES	157	10.6	166	11.1	173	11.0	194	10.4	223	10.7	260	11.7	251	11.3	257	11.0	249	10.7	217	10.6
INTERACTIVE							8	0.4	15	0.7	44	2.0	65	2.9	135	5.8	193	8.3	214	10.5
OUTDOOR	28	1.9	32	2.2	37	2.4	47	2.5	51	2.5	72	3.2	79	3.6	78	3.3	74	3.2	68	3.3
UNADDRESSED MAIL							56	3.1	59	2.8	56	2.5	64	2.9	65	2.8	61	2.6	58	2.8
ADDRESSED MAIL							35	1.9	34	1.6	34	1.5	35	1.6	36	1.5	56	2.4	53	2.6
CINEMA	13	0.9	9	0.6	8	0.5	12	0.6	13	0.6	11	0.5	10	0.4	10	0.4	9	0.4	6	0.3
TOTAL	1485	100.0	1488	100.0	1565	100.0	1857	100.0	2075	100.0	2229	100.0	2224	100.0	2335	100.0	2317	100.0	2045	100.0

IMPORTANT: Sources and Notes for 2009 figures are attached in a separate word document.

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Explanatory notes for the year ended 31 December 2009

- Newspapers:** This figure includes all cash revenue, including agency commission, excluding GST from all daily, Sunday and community newspaper titles in New Zealand. The revenue includes display, retail, classified and insert advertising. The figures are sourced from the member newspapers of the Newspaper Publishers' Association of New Zealand and the Community Newspapers Association of New Zealand. NOTE: Newspapers advise the figure reported is not a comparative measure with other main media revenue sources.
- Television:** This figure includes all cash revenue, including agency commission, excluding GST from free to air (including Prime) and pay television. The figures are independently collected for the New Zealand Television Broadcasters Council and reported to the ASA as a total revenue figure.
- Radio:** This figure includes all cash revenue, including agency commission, excluding GST from members of the Radio Broadcasters Association (RBA). Actual returns comprised 97% of the total radio advertising revenue for 2009. The total also includes an estimate for non-RBA members, iwi and student radio based on direct industry knowledge and projections based on market share. The figure is sourced from the Radio Broadcasters Association.
- Magazines:** This figure includes cash revenue, including agency commission, excluding GST from the majority of members of the Magazine Publishers Association (MPA). For some MPA member and non-member publications, an estimate has been made. The figure does not include revenue from classified advertising. It is estimated that MPA members represent 65% of magazine advertising revenue in New Zealand. The figure is sourced from the Magazine Publishers Association.
- Interactive:** This figure is comprised of cash revenue including agency commission, excluding GST. The 2009 figures include General Display Advertising, which includes revenues from Display such as banner advertisements of many different sizes and formats, affiliate marketing programmes, partnerships, sponsorships and emails; Classifieds, which includes revenues from ads placed to buy or sell an item or service and Search & Directories Advertising which includes revenues from online Directories and search engine listings. The figures are supplied via an independently audited process established by the Interactive Advertising Bureau on behalf of the interactive industry
- Outdoor:** This figure includes all cash revenue, including agency commission, excluding GST from members of the Outdoor Media Association of NZ (OMANZ) which represents over 95% of all Outdoor media revenue. The revenue data is independently collected for OMANZ. The figure also includes actual returns from five other companies involved in outdoor or ambient advertising.
- Unaddressed Mail:** This figure includes all cash revenue excluding GST, from the letterbox media companies. These companies are Reach Media and PMP Distribution. The revenue recorded is drawn from the cost of delivery. This total represents 95 % of the unaddressed mail advertising revenue in New Zealand.
- Addressed Mail:** This figure is an estimate based on the cost of delivery only. It does not include production or associated costs. It is compiled using volume and expenditure estimations from Nielsen Media Research's MailPix system. The Nielsen estimations (at standard postage rates) are validated and adjusted using New Zealand Post's own volume and expenditure data taking discounting into account to produce the final market revenue estimation. The figure is sourced from New Zealand Post.
- Cinema:** This figure includes all cash revenue, including agency commission, excluding GST from the two major companies involved in cinema advertising in New Zealand.