

CTTC Fiscal Year 2009-2010 International Brand Advertising Matrix

Below are tables showing trends for advertising effectiveness in Canada, the United Kingdom and Japan. Because of methodological differences, numbers across markets are not directly comparable, but numbers within markets over time are comparable.

	Canada Spring 2007	Canada Fall/Winter 2007/2008	Canada Spring 2009
Targeted Households	2.1 million	4.5 million	17.1 million
Ad Awareness %	73%	62%	63%
Ad Aware HHs	1.5 million	2.8 million	10.8 million
Media Costs	\$0.85 million ¹	\$1.3 million ¹	\$1.6 million ¹
Cost per HH	\$0.56	\$0.46	\$0.14
Incremental Trips	39,000	118,000	178,000
Average Party Trip Expenditures w/o Trans.	\$1,871	\$2,570	\$1,850
Total Incremental Spending w/o Air	\$73.4 million	\$303.5 million	\$330 million
Incremental Tax Revenue	\$4.7 million	\$19.4 million	\$21 million
Campaign Spending ROI	\$87 to \$1	\$237 to \$1	\$213 to \$1
Campaign Tax Revenue ROI	\$5.50 to \$1	\$15 to \$1	\$14 to \$1

United Kingdom Advertising ROI	Spring 2008	Spring 2009
Targeted Households	5.2 million	5.2 million
Ad Awareness %	63%	77%
Ad Aware HHs	3.3 million	4.0 million
Media Costs	\$1.9 million ²	\$3.1 million ²
Cost per HH	\$0.58	\$0.77
Incremental Trips	43,000	50,000
Average Party Trip Expenditures w/o Trans.	\$2,659	\$2,628
Total Incremental Spending w/o Air	\$113 million	\$132 million
Incremental Tax Revenue	\$7.3 million	\$8.5 million
Campaign Spending ROI	\$60 to \$1	\$42 to 1
Campaign Tax Revenue ROI	\$3.90 to \$1	\$2.90 to \$1

Japan Advertising ROI	Spring 2008	Fall 2008/Spring 2009	Fall 2009
Targeted Households	1.2 million	1.2 million	1.2 million
Ad Awareness %	68%	74%	75%
Ad Aware HHs	830,000	910,000	920,000
Media Costs	\$3.9 million ²	\$1.9 million ²	\$590,000 ²
Cost per HH	\$4.67	\$2.11	\$0.64
Incremental Trips	20,000	10,000	Available Spring 2010
Average Party Trip Expenditures w/o Trans.	\$1,971	\$3,045	
Total Incremental Spending w/o Air	\$39 million	\$30.3 million	
Incremental Tax Revenue	\$2.5 million	\$2.0 million	
Campaign Spending ROI	\$10 to \$1	\$16 to \$1	
Campaign Tax Revenue ROI	\$0.70 to \$1	\$1 to \$1	

Media Costs: 1 = TV only; 2 = TV and Print (includes outdoor and online as well for U.K. in spring 2009, and outdoor for Japan in fall 2009).

Sources: Strategic Marketing & Research, Inc.; Rakuten Research; MeringCarson; Times Media Group; Yomiko