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# GLOBAL ADVIEW PULSE *lite*

YOUR CONNECTION TO GLOBAL  
ADVERTISING TRENDS

QUARTER 1 2014





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Advertising  
trends



By media  
type and  
sector

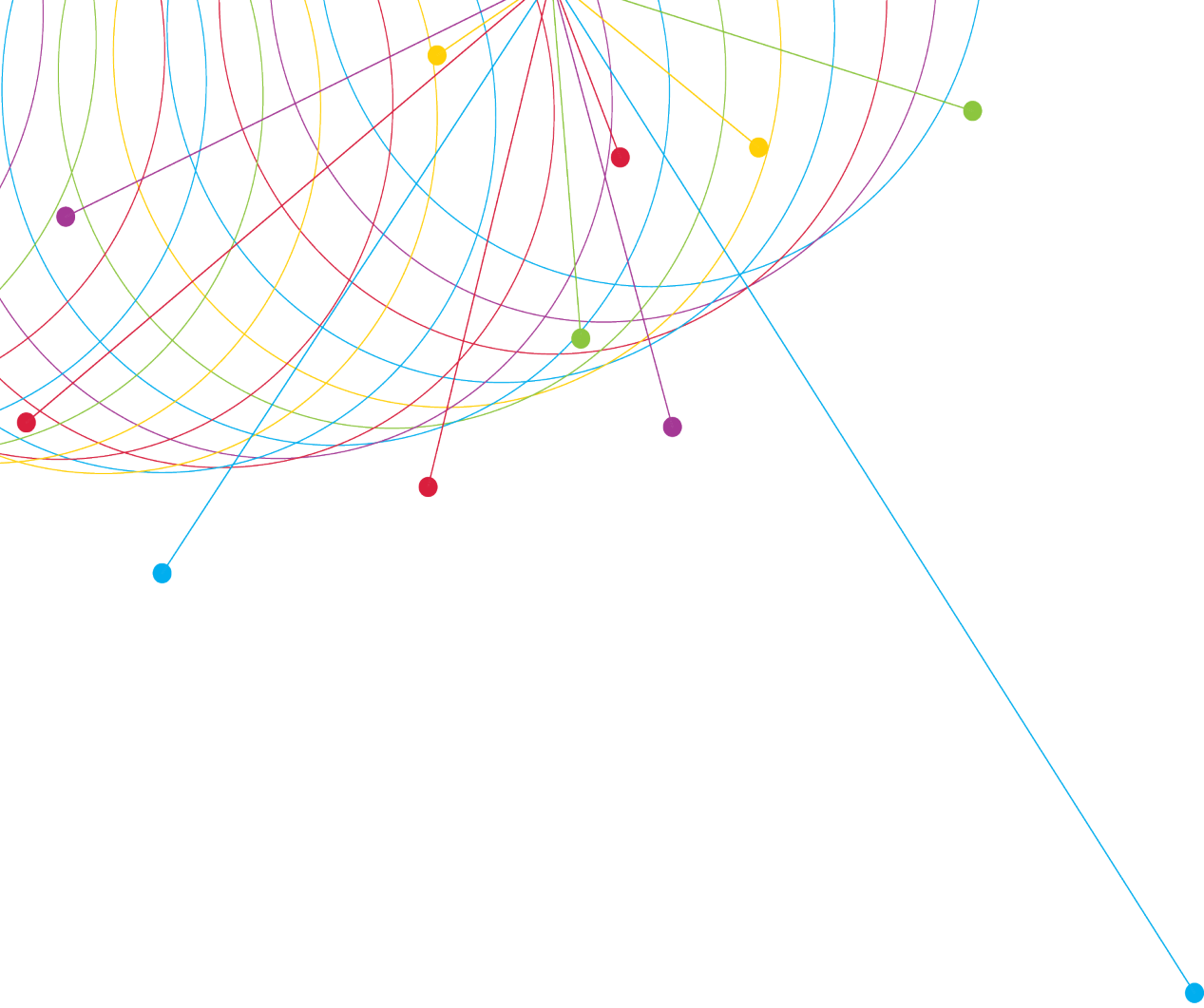


By region and  
country

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# WORLD TRENDS

YEAR TO DATE

# GLOBAL ADVERTISING TRENDS

## YEAR TO DATE

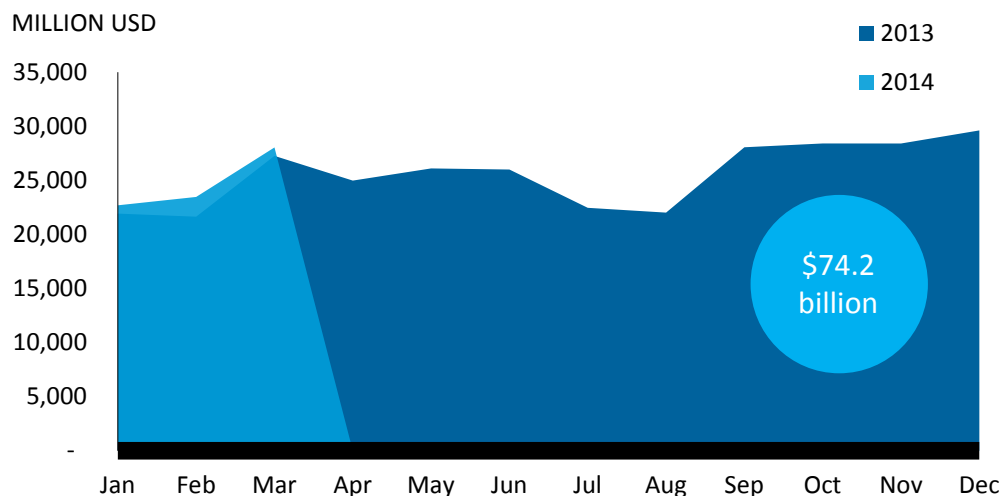
### MAIN EVENTS

- Global consumer confidence jumps two points from Q4, now at 96
- While optimism remains for Europe's economy, several major markets report surprisingly disappointing GDP results in Q1, reminding us that the recovery is not yet stable

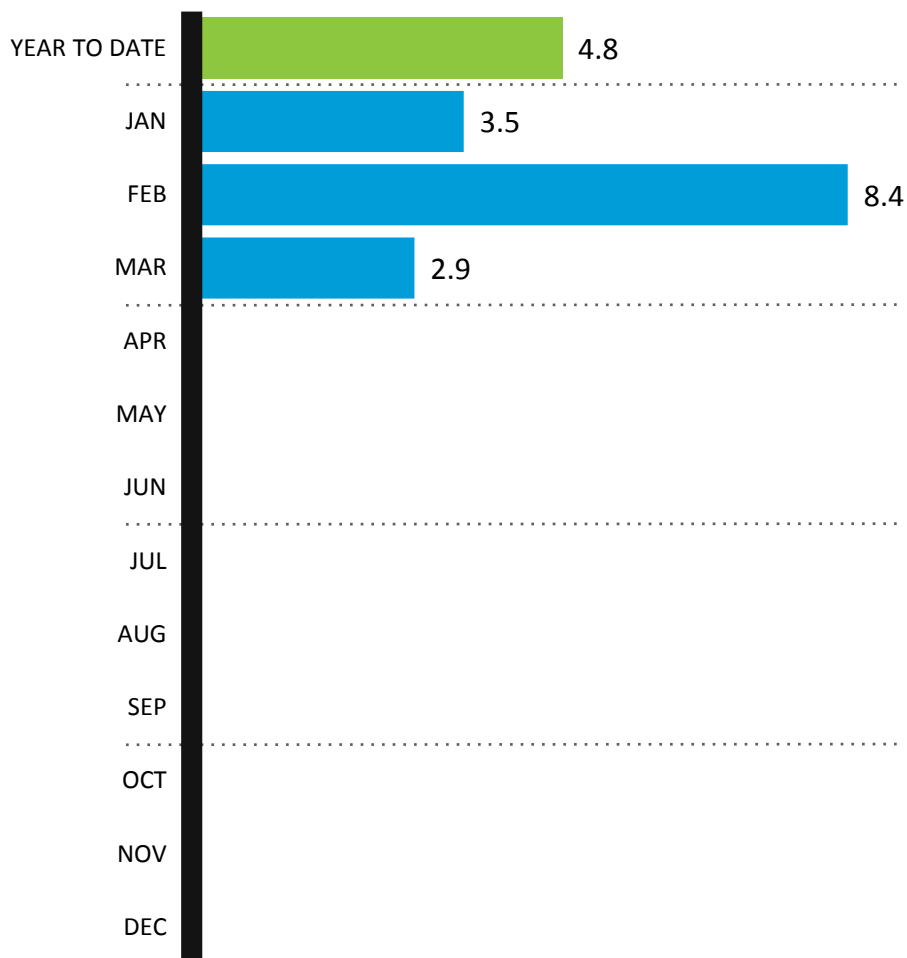
### MAIN FACTS

- Advertising market expands 4.8 percent during the first quarter, continuing the momentum seen late last year
- Ad investments rise 6.9 percent in North America—driven by a 7.3 percent increase from the US
- Financial advertising unseats Industry & Services as the macro sector with the highest percentage growth, led by increasing investments from the insurance/assurance category

### ADVERTISING EXPENDITURE TREND



## YEAR ON YEAR % CHANGE BY MONTH



## MACRO ECONOMIC TRENDS

- GDP (constant prices)\* + 3.6%
- Consumer Prices\* + 3.5%
- Nielsen Consumer Confidence Index: 96\*\*  
(+2 compared to Q4 2013)

\*2014 vs. 2013 forecasts  
\*\*Q1 2014 survey

# AD MARKET JUMPS 4.8% IN THE FIRST QUARTER

After a 3.7 percent growth for the full year 2013, the global advertising market picked up speed again in the first quarter of 2014—growing by 4.8 percent. Advertising was most notably active during the month of February (up 8.4%), which may in part be due to increased revenue from the Sochi Winter Olympics.

Regionally, North America pumped 6.9 percent more investments into advertising, as US consumers became considerably more confident in the economy. Nielsen reports that US consumer confidence grew six points from Q4 2013 to 100—despite the fact that a severe winter cooled the economies of both Canada and the United States.

The Asia Pacific ad market, a beacon of stability during 2013, cooled to a 2.1 percent growth during the first quarter, mainly due to a slowdown in China (up 1.5%). The emerging markets of Indonesia (up 14.4%) and Malaysia (up 13.3%) helped counteract some of the negative trends.

In Europe, the ad market looked very similar to how we ended 2013—down slightly by -2.1 percent. With disappointing economic figures from some of the major markets in Europe, it appears advertisers in Europe are still exercising caution despite the careful optimism for a recovery.

Advertisers in Latin America spent 19 percent more year-on-year during the first quarter, fueled by double-digit increases in investments from Argentina, Brazil, and Mexico. The trend marks a significant increase from the 14.4 percent expansion seen in this region during 2013.

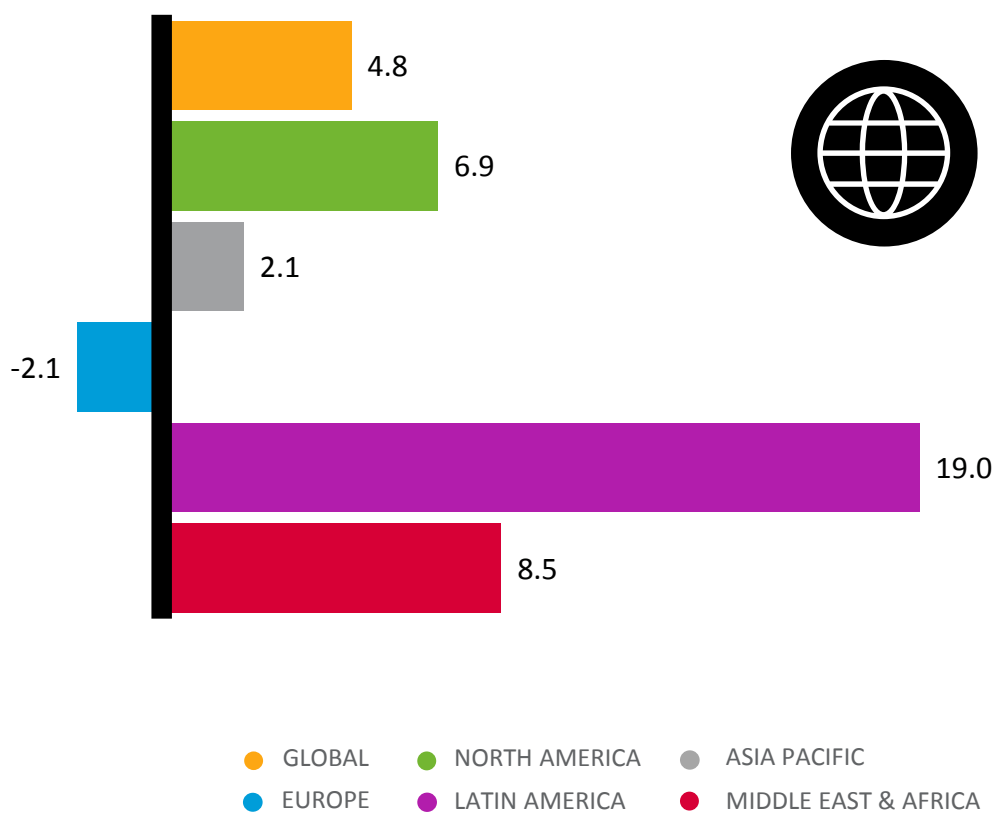
After a 2.2 percent increase in advertising during the full year 2013, the Middle East and African ad market gained speed at the beginning of 2014—now up by 8.5 percent. The steady increase is in large part due to advertisers' confidence in the Pan-Arab Media market (Middle East media titles that have significant audience in two or more markets), as brands continue to look at advertising with a more stable, multi-market reach within the turbulent Middle East region.

## TRENDS TO WATCH

As forecasted in our Q4 2013 report, the global advertising market has continued to pick up speed in the first quarter of 2014, with ad market investments from the Sochi Winter Olympics during the month of February.

With continued economic optimism, Easter advertising in April, and the FIFA World Cup taking place in June and July, Nielsen anticipates that further lifts in the ad market will be seen in the second quarter.

### REGIONS - YEAR ON YEAR % CHANGE





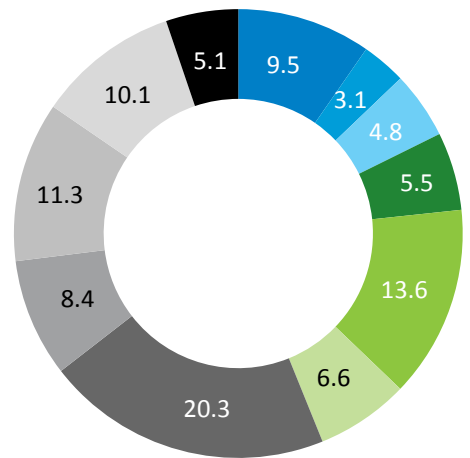
## MACRO SECTORS

The Financial industry is investing. Finance advertisers globally poured almost 10 percent more year-on-year into advertising in the first quarter, driven by a healthy push from the insurance/assurance sector (up 13%). Though banking services (including online banking) was down by 7 percent, card services advertisers invested 14.4 percent more than they did last year. The sector grew in all regions with the sole exception of the Asia Pacific, which declined by -4.2 percent.

The Industry & Services sector continued its spending spree, investing 9 percent more on advertising. Driving the growth within the Industry & Services sector was the Industry, Agriculture, and Property sub-sector (up 8.8%) and Institutions (up 11.5%).

After growing by 6.1 percent in 2013, the FMCG sector cooled their ad investments in the first quarter, now at 2.5 percent. North America and Asia Pacific invested slightly more (up 1.1 and 2.1% respectively), but Europe's budget cuts brought down the global average—with a -2.5 percent decrease in European FMCG ad spending.

## SECTORS - % SHARE OF SPEND - YEAR TO DATE



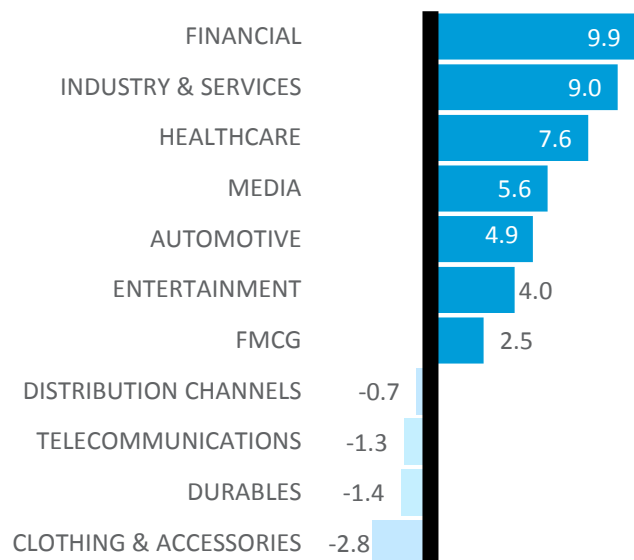
- AUTOMOTIVE
- CLOTHING & ACCESS.
- DISTRIBUTION
- DURABLES
- ENTERTAINMENT
- FINANCIAL
- FMCG
- HEALTHCARE
- INDUSTRY & SERV.
- MEDIA
- TELECOM.

## SECTORS - % CHANGE YEAR TO DATE



**FINANCIAL COMPANIES**  
increase ad budgets by 9.9%  
year-to-date

FMCG advertising spend growth slows to +2.5%





# METHODOLOGY NOTES



# METHODOLOGY

The information included in this report has been compiled, harmonized and produced by **Nielsen Global AdView**.

The Nielsen Global AdView Pulse reports on advertising expenditure for Argentina, Australia, Bahrain, Belgium, Brazil, Canada, China, Egypt, Germany, Greece, Hong Kong, Indonesia, Ireland, Italy, Japan, Kuwait, Lebanon, Malaysia, Mexico, The Netherlands, New Zealand, Norway, Oman, Pan-Arab Media, Philippines, Portugal, Puerto Rico, Qatar, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Switzerland, Taiwan, Thailand, Turkey, The United Arab Emirates, The United Kingdom, and The United States of America.

Pan-Arab Media refers to the media outlets in the Middle East that have significant viewership, readership or listenership in two or more markets and are not localized to only one market in the region. They do not represent a duplication with the coverage of each country and gather a significant amount of the advertising in the region.

## THE MEDIA GROUP WITHIN NIELSEN, IS THE DATA SOURCE FOR THE FOLLOWING COUNTRIES:

AUSTRALIA	NORWAY
BELGIUM	PUERTO RICO
CANADA	PHILIPPINES
CHINA*	SINGAPORE
GERMANY	SOUTH AFRICA
INDONESIA	SOUTH KOREA
IRELAND (REPUBLIC OF)	SWITZERLAND**
ITALY	TAIWAN
MALAYSIA	THAILAND
THE NETHERLANDS	TURKEY
NEW ZEALAND	UNITED KINGDOM
	UNITED STATES OF AMERICA

*\*Provided by Nielsen CC Data*

*\*\* In association with Media Focus*

## THE DATA SOURCES FOR THE OTHER COUNTRIES INCLUDED IN THE REPORT ARE:

Argentina:	IBOPE
Bahrain:	PARC (Pan Arab Research Centre)
Brazil:	IBOPE
Egypt:	PARC (Pan Arab Research Centre)
Greece:	Media Services
Hong Kong:	admanGo
Japan:	Nihon Daily Tsushinsha
Kuwait:	PARC (Pan Arab Research Centre)
Lebanon:	PARC (Pan Arab Research Centre)
Mexico:	Nielsen IBOPE
Oman	PARC (Pan Arab Research Centre)
Pan-Arab Media:	PARC (Pan Arab Research Centre)
Portugal:	Mediamonitor
Qatar	PARC (Pan Arab Research Centre)
Saudi Arabia:	PARC (Pan Arab Research Centre)
Spain:	Arce Media
UAE:	PARC (Pan Arab Research Centre)

The source for the macro-economic indicators is IMF (International Monetary Fund) – World Economic Outlook April 2014 (website: [www.imf.org](http://www.imf.org)).

The Nielsen Global Survey of Consumer Confidence and Spending Intentions was conducted between Feb. 17 – March 7, 2014 and polled more than 30,000 online consumers in 60 countries throughout Asia-Pacific, Europe, Latin America, the Middle East, Africa and North America. The sample has quotas based on age and sex for each country based on their Internet users, and is weighted to be representative of Internet consumers and has a maximum margin of error of  $\pm 0.6\%$ . This Nielsen survey is based on the behavior of respondents with online access only. Internet penetration rates vary by country. Nielsen uses a minimum reporting standard of 60 percent Internet penetration or 10M online population for survey inclusion. The China Consumer Confidence Index is compiled from a separate mixed methodology survey among 3,500 respondents in China. The Nielsen Global Survey, which includes the Global Consumer Confidence Index, was established in 2005.

Figures are expressed in Million USD and are estimated net with Nielsen Global AdView estimated weighting factors, except for Australia, Ireland and the UK which are estimated net at source. USA and Spanish figures are based on apples-to-apples comparisons to the previous year, both in terms of coverage and methodology, in order to give a more accurate representation of the trends. The source for the exchange rates is OANDA (website: [www.oanda.com](http://www.oanda.com)) and the rate applied to all figures is the 2013 yearly average.

In order to reflect the most accurate picture for media type trends and macro-sector trends, the methodology used for each may differ. Adjustments and estimates necessary to represent the media type trends accurately may not be suitable for the macro-sector trends. In some cases a direct comparison is therefore not possible.

## MAP OF THE REPORT

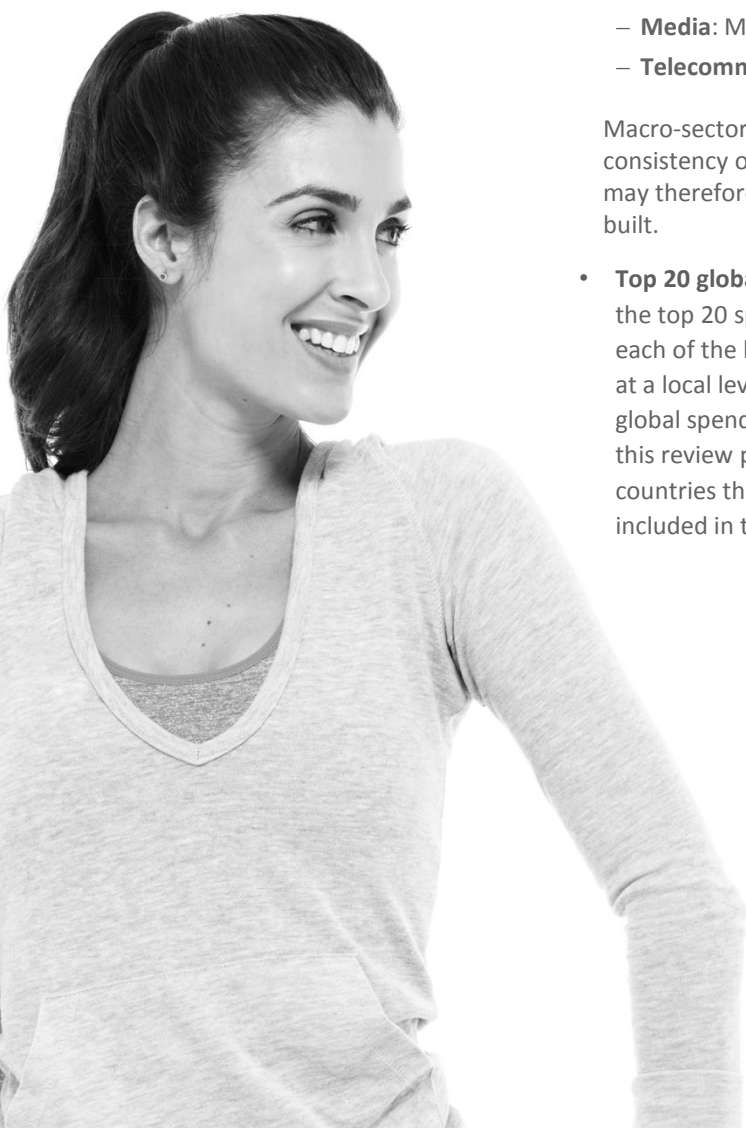
- **World Trend:** this section includes all territories and relates to the following media types : Television, Newspapers, Magazines, Radio, Outdoor, and Cinema.
- **Regions:** this section includes spend on Television, Newspapers, Magazines, Radio, Outdoor, and Cinema. Each region includes the following countries:
  - **North America:** Canada, United States of America.
  - **Asia Pacific:** Australia, China, Hong Kong, Indonesia, Japan, Malaysia, New Zealand, Philippines, Singapore, South Korea, Taiwan, Thailand.
  - **Europe:** Belgium, Germany, Greece, Ireland, Italy, The Netherlands, Norway, Portugal, Spain, Switzerland, Turkey, United Kingdom.
  - **Latin America:** Argentina, Brazil, Mexico, Puerto Rico.
  - **Middle East and Africa:** Bahrain, Egypt, Kuwait, Lebanon, Oman, Pan-Arab Media, Qatar, Saudi Arabia, South Africa, United Arab Emirates.

*Note: Pan-Arab Media refers to the media titles in the Middle East that have significant viewership, readership or listenership in two or more markets and are not localized to only one market in the region. They do not represent a duplication with the coverage of each country and gather a significant amount of the advertising in the region.*

- **Country breakdown** refers to all major media types available in the country (Television, Newspapers, Magazines, Radio, Outdoor, Cinema).
- **Macro-sectors** include the following Categories:
  - **Automotive:** Automotive
  - **Industry & Services:** Business Services, Property, Institutions, Power & Water
  - **Clothing & Accessories:** Clothing & Accessories
  - **FMCG:** Cosmetics & Toiletries, Drinks, Food, Housekeeping Products, Tobacco
  - **Distribution Channels:** Distribution Channels (including also: Mail Order, Multiple Product Retailers, On-line shopping & generic on-line services, Corporate/Image and sponsorship Distribution Channels)
  - **Durables:** Domestic Appliances, Furnishings & Decoration, Information Technology
  - **Entertainment:** Entertainment, Leisure products, Transport & Tourism
  - **Financial:** Financial
  - **Healthcare:** Healthcare
  - **Media:** Media & Publishing
  - **Telecommunications:** Telecommunications

Macro-sectors and Categories are harmonized in order to allow consistency of comparison between regions and countries. They may therefore differ to how the local sectors and categories are built.

- **Top 20 global spenders:** this ranking has been compiled to show the top 20 spenders at corporate/holding company level. Using each of the businesses comprising these international corporations at a local level the cumulative total has been reported. The top 20 global spenders rank is based on the Nielsen countries included in this review plus Spain, Portugal and Hong Kong. For the remaining countries the advertiser detail is not available in a way that can be included in the global ranking.



## MEDIA COVERAGE OVERVIEW

THIS TABLE PRESENTS AN OVERVIEW OF THE MEDIA TYPES COVERED IN EACH TERRITORY.

	TV	NEWSP.	MAGAZ.	RADIO	OUTDOOR	CINEMA	INTERNET
<b>NORTH AMERICA</b>							
CANADA							
USA							
<b>ASIA PACIFIC</b>							
AUSTRALIA							
CHINA							
HONG KONG							
INDONESIA							
JAPAN							
MALAYSIA							
NEW ZEALAND							
PHILIPPINES							
SINGAPORE							
SOUTH KOREA							
TAIWAN							
THAILAND							
<b>EUROPE</b>							
BELGIUM							
GERMANY							
GREECE							
IRELAND							
ITALY							
NETHERLANDS							
NORWAY							
PORTUGAL							
SPAIN							
SWITZERLAND							
TURKEY							
UK							

THIS TABLE PRESENTS AN OVERVIEW OF THE MEDIA TYPES COVERED IN EACH TERRITORY.

	TV	NEWSP.	MAGAZ.	RADIO	OUTDOOR	CINEMA	INTERNET
<b>LATIN AMERICA</b>							
ARGENTINA							
BRAZIL							
MEXICO							
PUERTO RICO							
<b>MIDDLE EAST AND AFRICA</b>							
BAHRAIN							
EGYPT							
KUWAIT							
LEBANON							
OMAN							
PAN-ARAB MEDIA							
QATAR							
SAUDI ARABIA							
SOUTH AFRICA							
UAE							



## CONTACT

E-mail: [globaladview@nielsen.com](mailto:globaladview@nielsen.com)

## NIELSEN GLOBAL ADVIEW

Nielsen Global AdView provides information on what advertisers are spending, where and how, in more than 80 countries. With a deep and complete knowledge of local market advertising trends, ad spend, creatives, and TV gross rating points (GRPs) can be compiled, linked and harmonized at brand and product level to enable quick strategic insight into competitive activity within a client's own product sector.

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## ABOUT NIELSEN

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence and mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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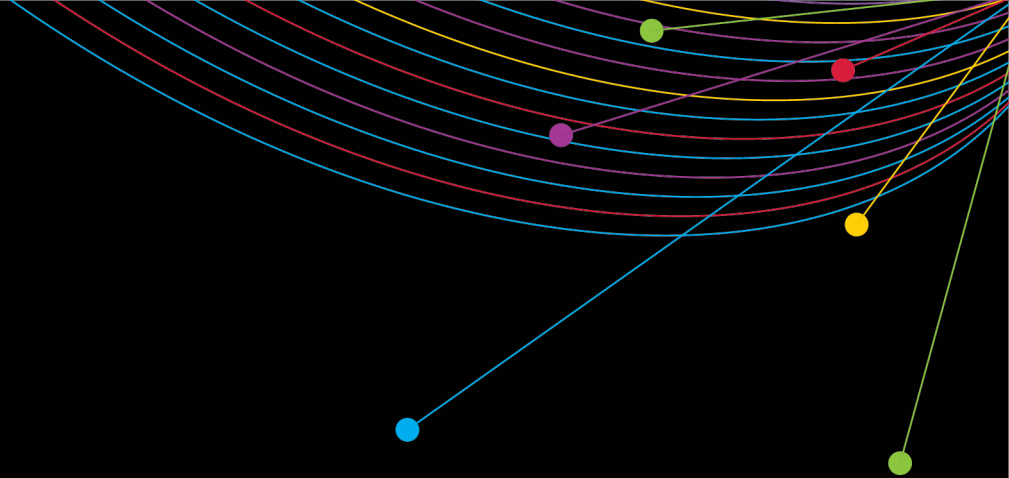
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