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global advertising trends

Quarter 2 2012

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INSIDE:

Global  
Advertising Trends

Trends by Media Type  
& by Category

Sample of Full Report



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# WORLD TRENDS

Year to date



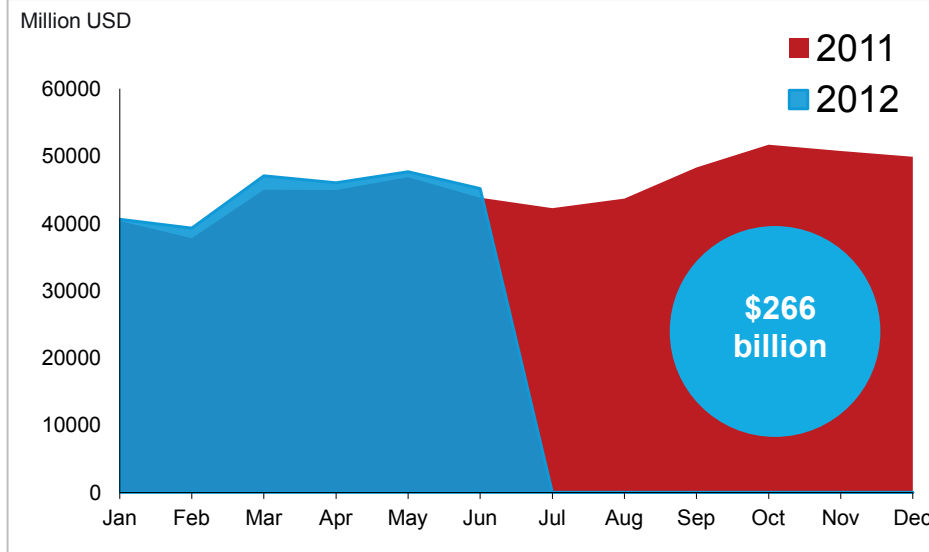
# Global Advertising Trends

Year to date

## Main Events

- Global online consumer confidence decreases three index points in Q2 2012 to 91
- Discretionary spending and saving decreased globally across all sectors, with more than two-thirds of consumers changing spending habits to save on expenses
- The Euro zone crisis continues to worsen, combined with a downward GDP revision from the economic powerhouse China

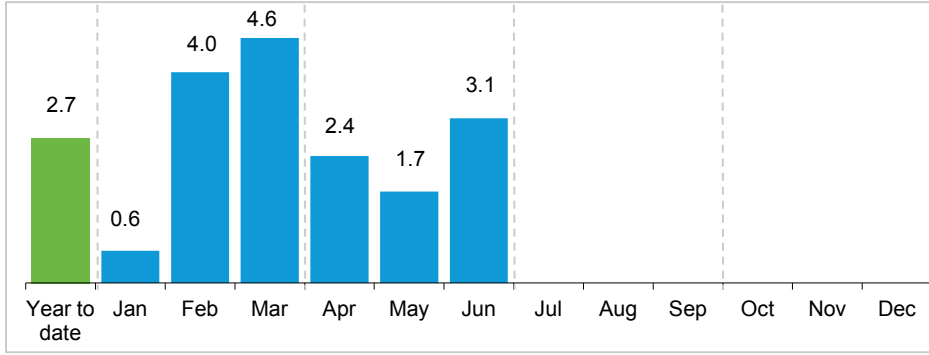
## ADVERTISING EXPENDITURE TREND



## Main Facts

- Advertisers continue to spend cautiously during the first half of 2012, though budgets are on the upswing by +2.7%
- North America continues to trend positively, increasing ad budgets by 2.4%
- Europe, on the other hand, makes deeper cuts in advertising budgets—ending the first half of 2012 with a -2.7% decrease in spending vs. 1H 2011

## YEAR ON YEAR % CHANGE BY MONTH



### MACRO ECONOMIC TRENDS

- GDP (constant prices)\* + 3.5%
- Consumer Prices\*\* + 4.0%
- Nielsen Consumer Confidence Index: 91\*\* (-3 compared to Q1 2012)

\*2012 vs. 2011 forecasts  
\*\*Q2 2012 survey



# Global ad spend increases 2.7% in 1H 2012

Global ad spend totaled USD 266 billion in the first half of 2012, showing a 2.7 percent increase over the same period in 2011.\* Increases were relatively contained when compared with the difficult first half of 2011, rife with natural disasters, political uprisings, and the ripple effects of financial crises in both Europe and the United States.

Clearly both advertisers and consumers are proceeding cautiously in an uncertain economic environment, where even economic powerhouses like China are facing downward GDP revisions and unprecedented advertising budget cuts. According to Nielsen, global

consumer confidence decreased three index points in the second quarter to 91 amid worrying economic signals from Europe, China, and a stalled U.S. job market.

Though advertising budget cuts continue to run rampant in Europe (down -2.7% in 1H 2012 vs. 1H 2011), advertising expenditures in North America showed positive trends in the second quarter, ending the first half of 2012 with a +2.4 percent increase over a year earlier. The increase is in part attributable to a 12.4 percent increase in Industry & Services advertising during Q2, which includes government and political advertising in advance of the U.S. presidential election in November.

Emerging markets of Latin America (up 6.9%) and the Middle East & Africa (up 21.1%) led growth during the first half of 2012, though the

Middle East's growth is in part due to the low base of comparison against the first half of 2011—when the Arab Spring rocked both the economies and advertising markets of many countries in the region.

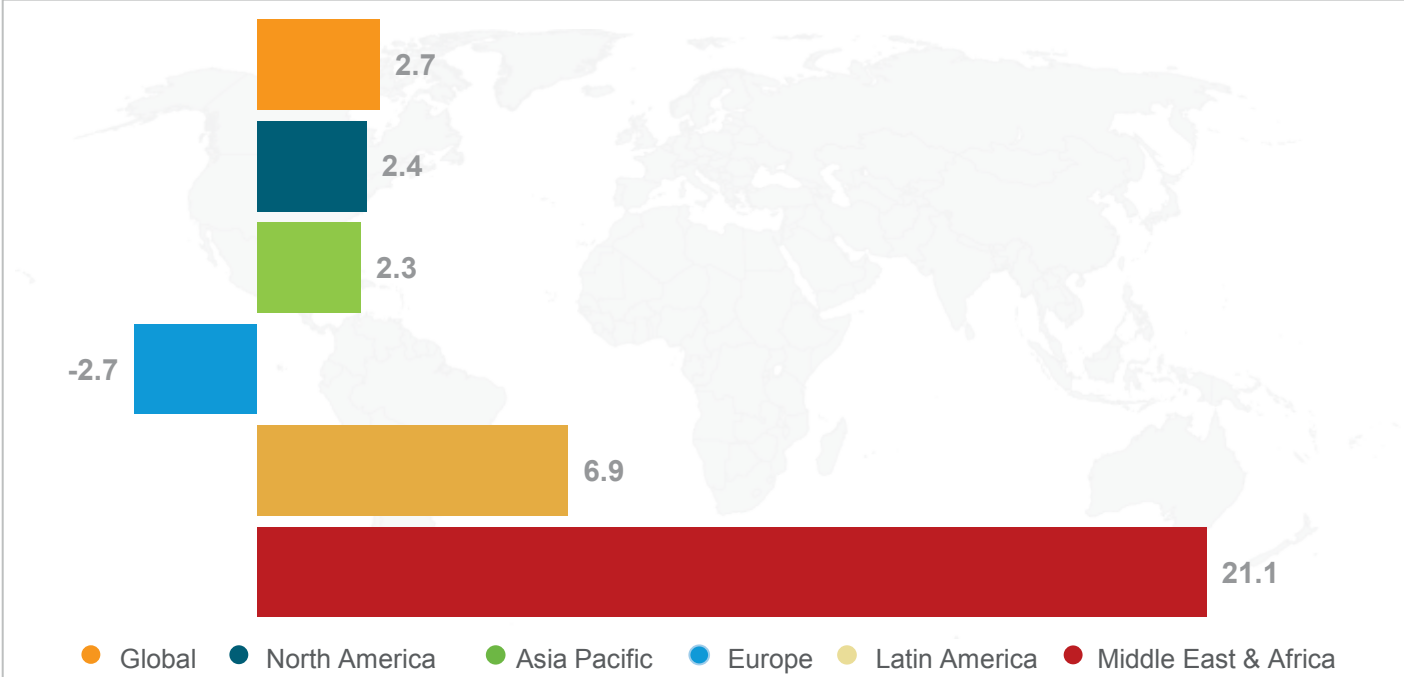
### Trends to Watch

Though second quarter advertising growth was more tempered than the first, the month of June showed the highest percentage growth trend for Q2 (+3.1%).

Nielsen will watch to see if these upward trends, combined with the London 2012 Olympics and the run up to the U.S. president election, are sustained in the third quarter—potentially providing positive impacts to the global advertising market.

\* based mainly on published rate cards

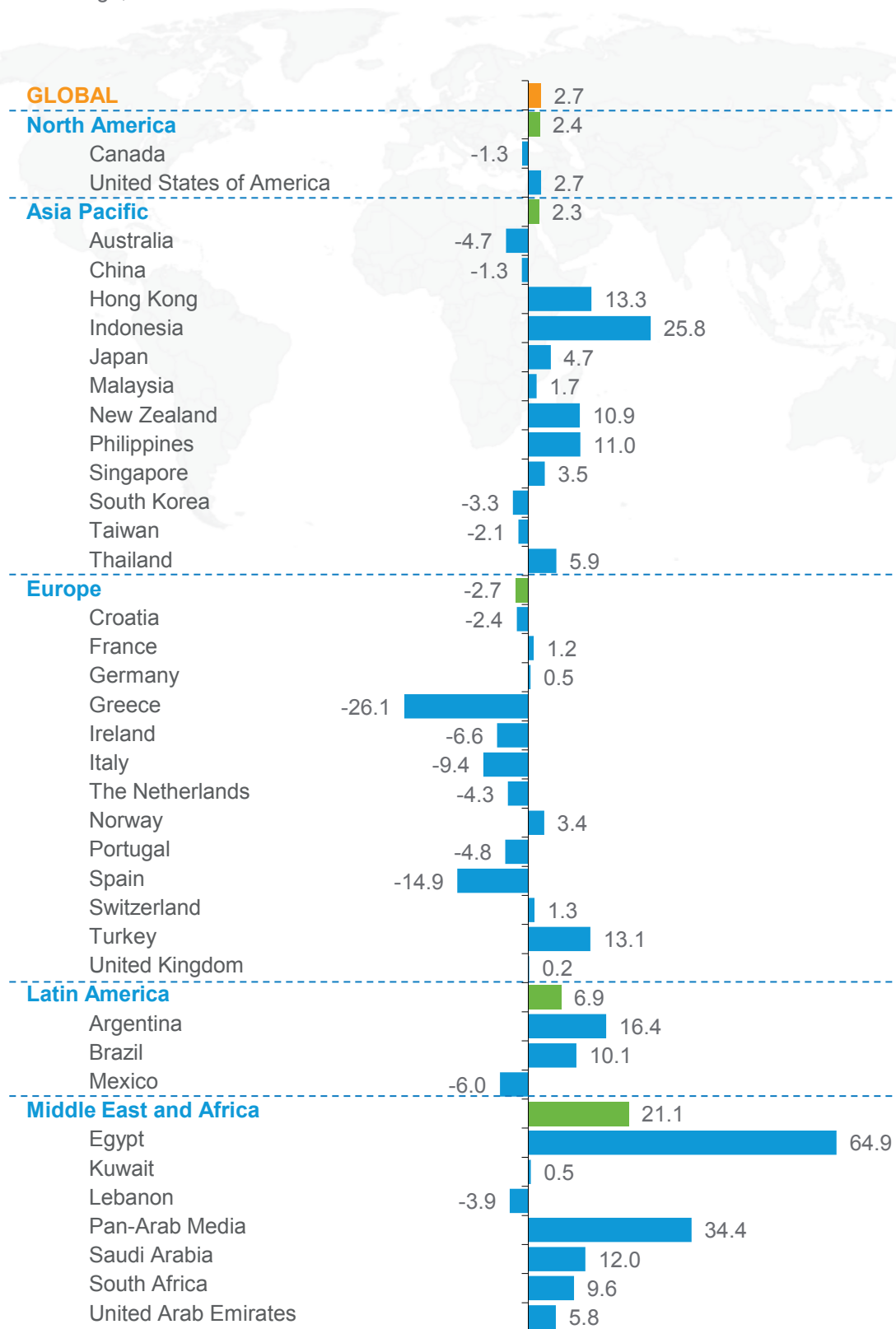
REGIONS -- YEAR ON YEAR % CHANGE





# GLOBAL TREND – OVERVIEW BY REGION AND COUNTRY

Year on Year % Change, YTD







## Media Types

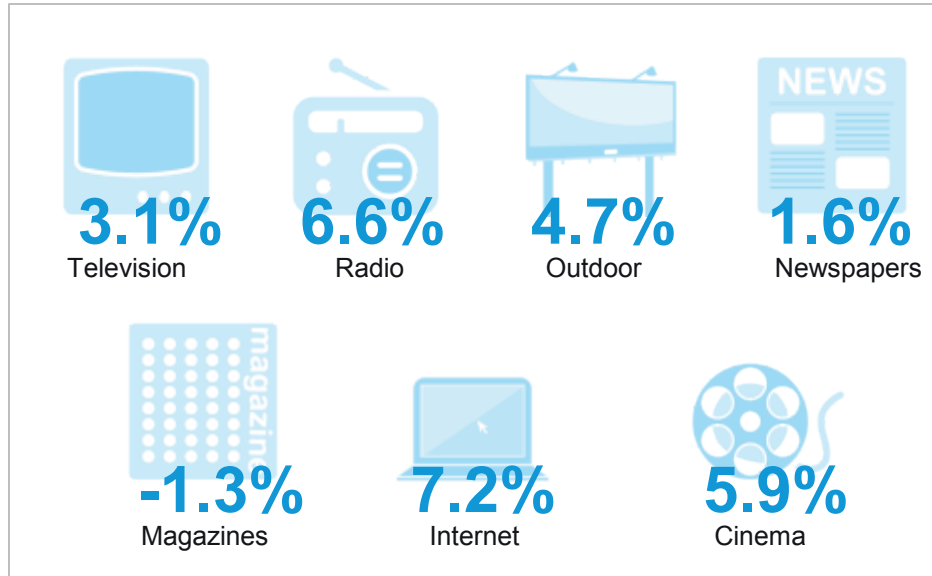
Though advertising budgets are on the rise (up 2.7% in the first half of 2012), advertisers appear to be choosing their mode of communication carefully in order to re-engage with consumers. When compared with the trends seen in the first quarter, most of the media types showed more contained increases during the first half of 2012—with the exception of Television.

Television advertising, which increased 2.8 percent year-on-year in the first quarter, saw a 3.1 percent increase in advertising expenditures for the first half of 2012. Television increased by 4.0 percent in North America, driven by a 4.2 percent increase in ad spend from the U.S. The Middle East & Africa saw a significant increase in Television ad spend of 30.1 percent during the first half of 2012, as Egypt's advertising market rebounded from last year's Arab Spring.

Both Newspapers and Magazines, on the other hand, saw budget cuts during the second quarter, though Newspapers still trended positively for the first half of 2012 (+1.6%).

Every single market monitored in Europe, with the exceptions of Norway and Turkey, recorded a decrease in Newspaper advertising spend.

## MEDIA -- % CHANGE YEAR TO DATE



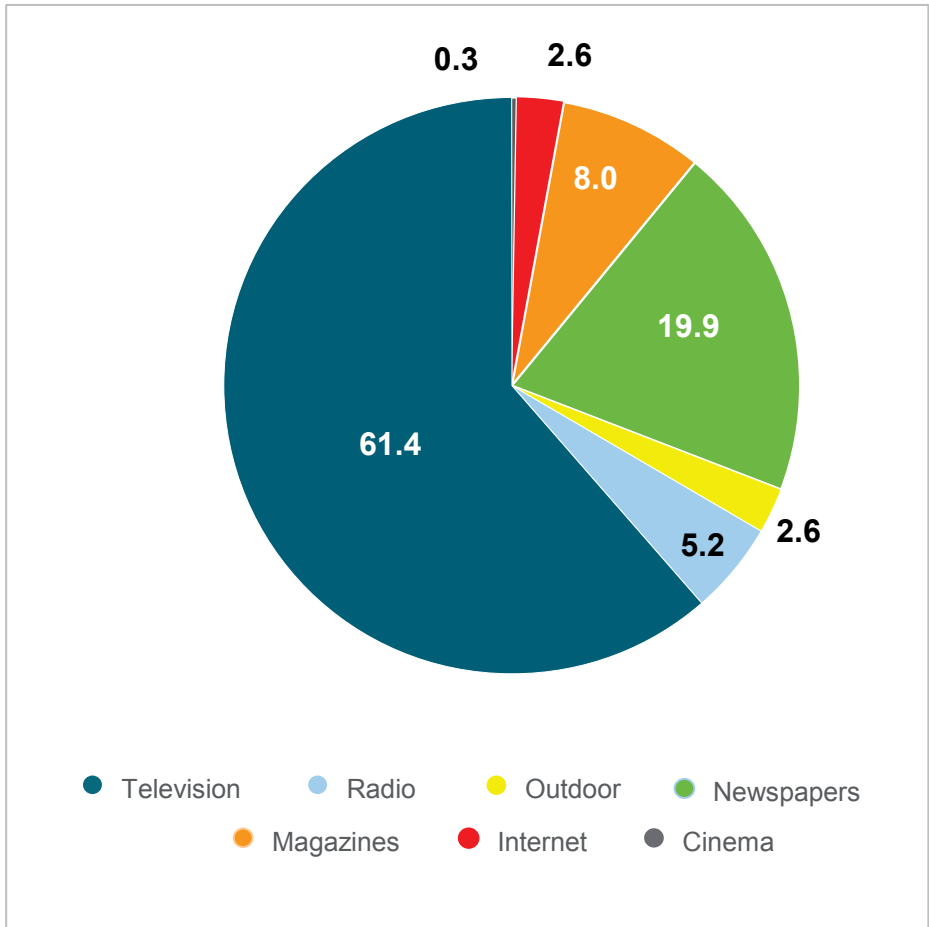


**Media Types - continued**

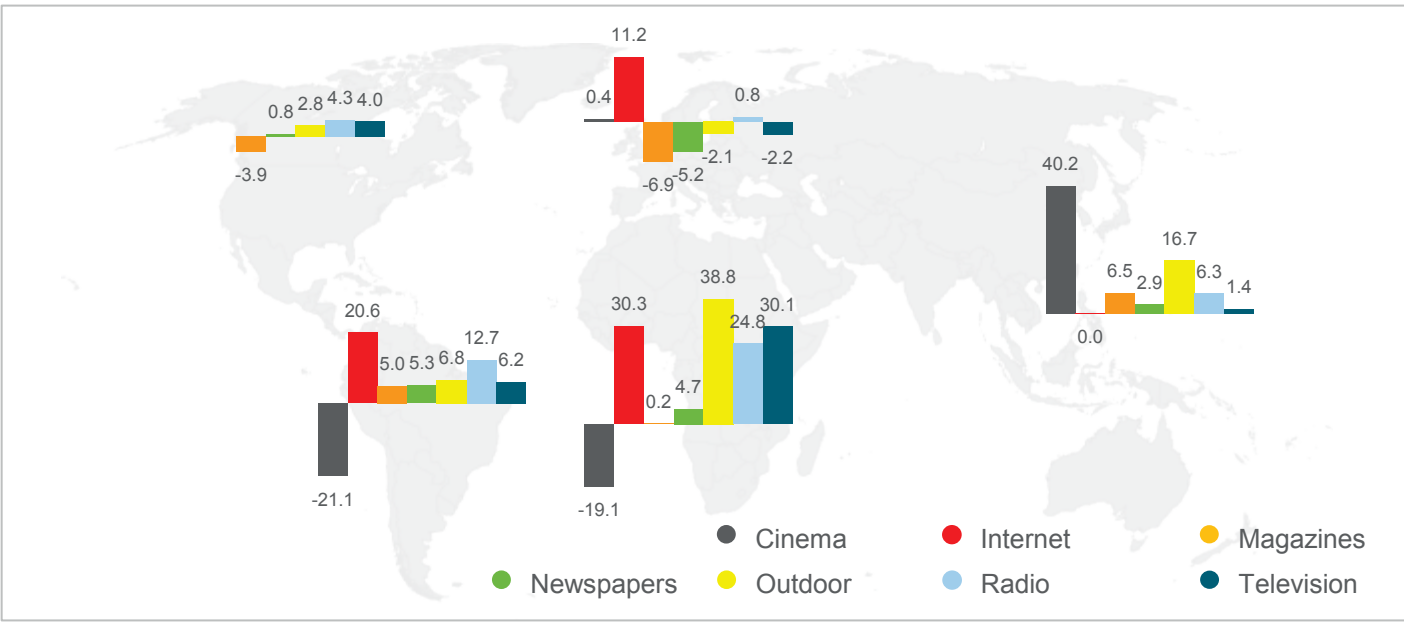
Though representing a smaller share of spend at 5.2 percent, Radio continued to see increases in every region across the globe, with a 4.3 percent increase in North America and a slight 0.8 percent increase in Western Europe. The emerging markets of Latin America (+12.7%) and the Middle East & Africa (+24.8%) saw more significant increases for this medium.

Online ad spend (specifically display advertising) contributed to the growth momentum around the globe, with a +7.2 percent increase recorded globally. Global growth was slightly tempered, however, due to a decrease in Internet ad spending in China—an effect of overall advertising budget cuts in that market.

**MEDIA -- % SHARE OF SPEND -- YEAR TO DATE**



**MEDIA BY REGION – YEAR-ON-YEAR % CHANGE, YEAR TO DATE**



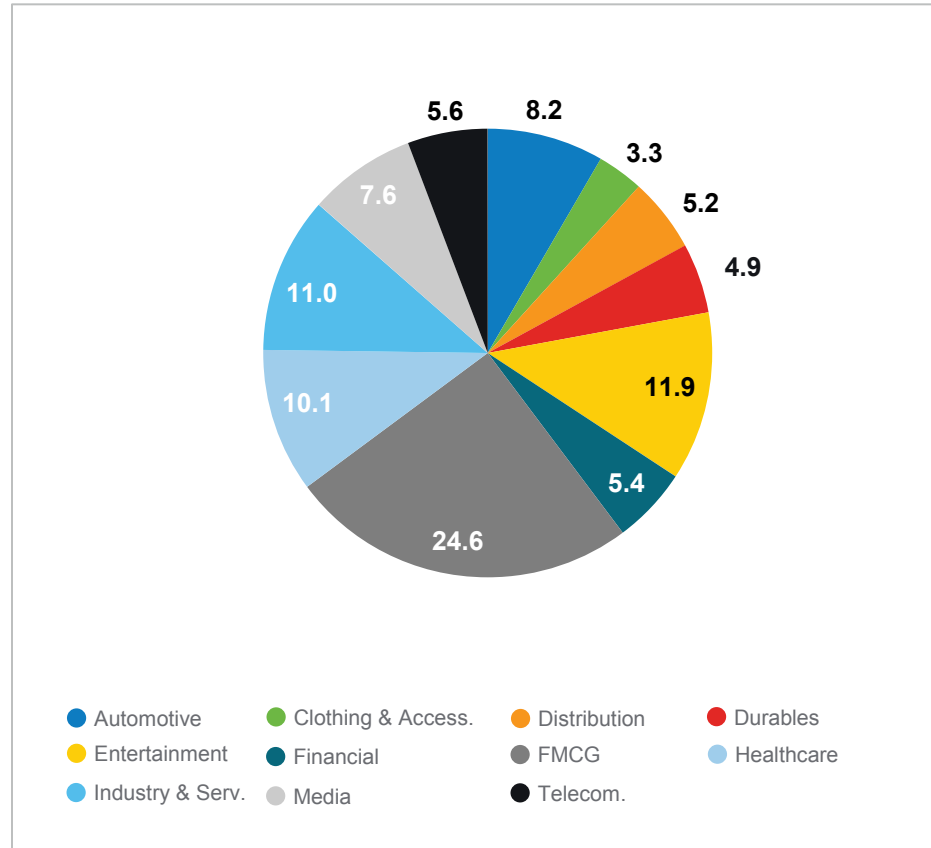


## Macro Sectors

Though many sectors are spending cautiously within an uncertain economic environment, Telecommunications companies continued investing significantly more on advertising than they did last year. Increasing spending globally by +7.9 percent, the Telecommunications sector saw the most considerable increases in emerging markets like Latin America (up 32.5%) and the Middle East & Africa (+28.3%).

After more cautious spending during the first quarter, the Automotive sector also boosted spending by 6.3 percent during the first half of 2012 compared with the same period last year. Even in the embattled region of Western Europe, advertising spending increased by +1.4 percent when comparing 1H 2012 to 1H 2011.

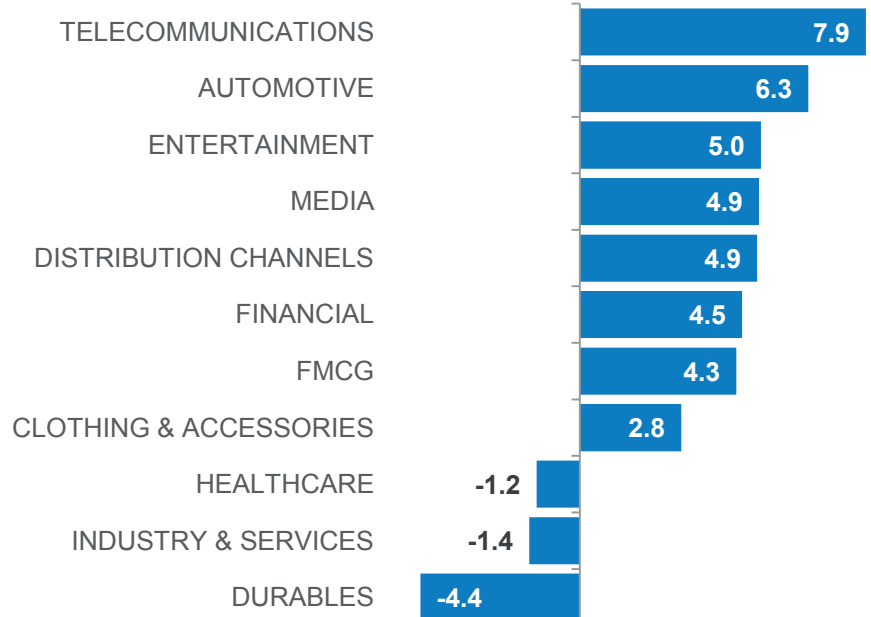
## SECTORS -- % SHARE OF SPEND -- YEAR TO DATE



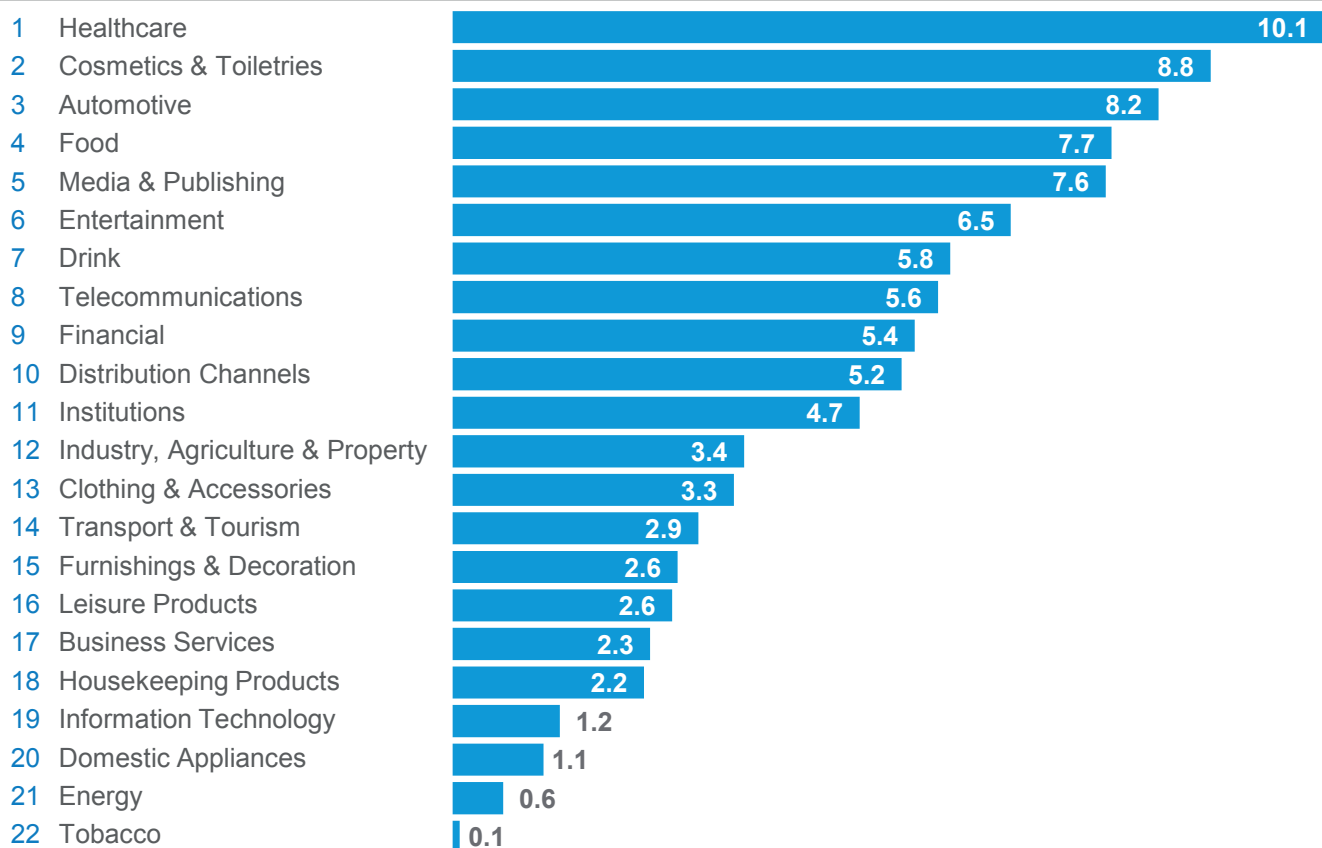
## SECTORS -- % CHANGE YEAR TO DATE

### TELECOMMUNICATIONS increases ad spend by 7.9% in 1H 2012

*Sector sees the most considerable increases in the emerging markets of Latin America and the Middle East & Africa*

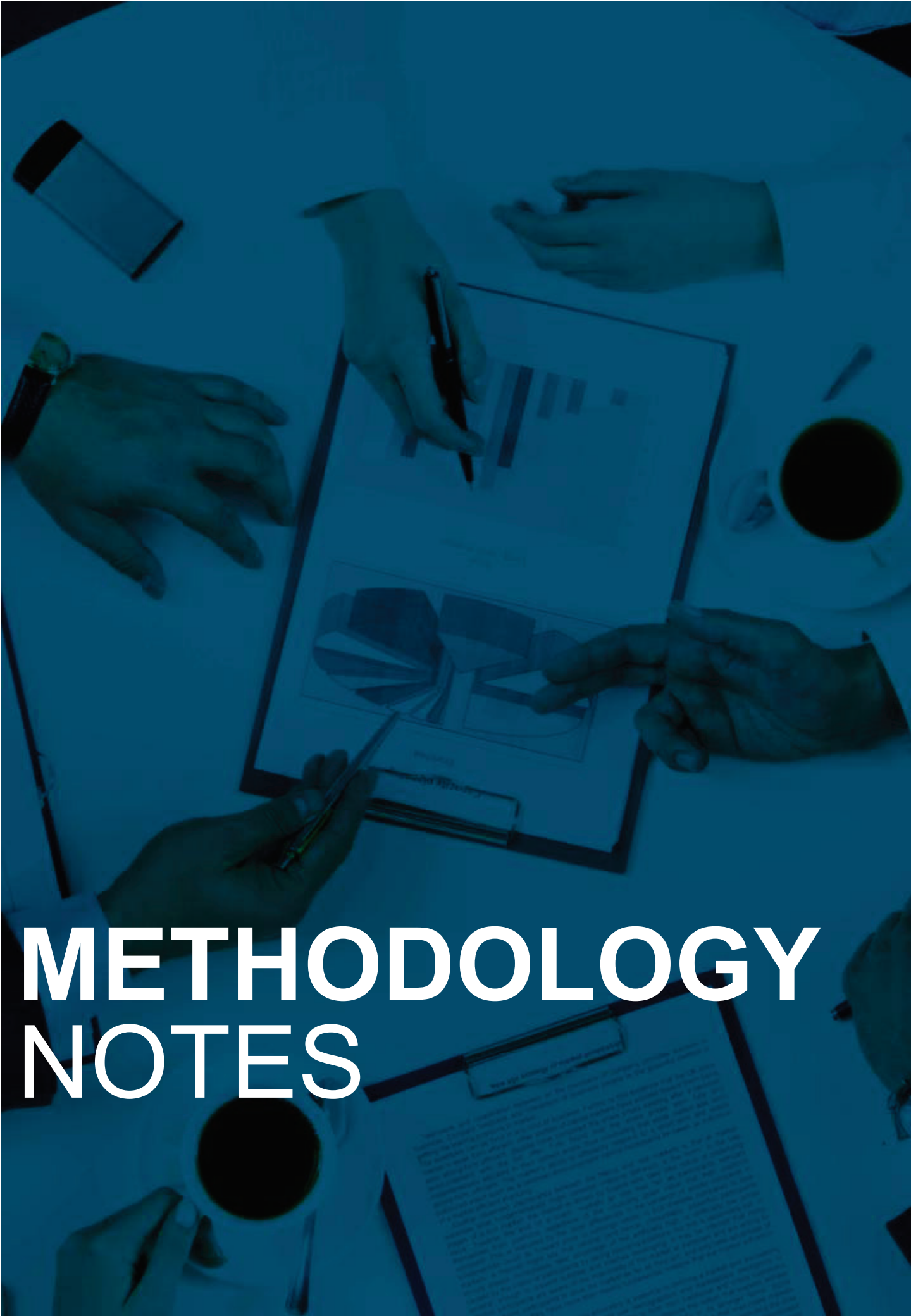


## CATEGORIES RANK AND % SHARE OF SPEND, YTD



## TOP 20 GLOBAL SPENDERS, YTD

1	PROCTER & GAMBLE	11	HONDA
2	UNILEVER	12	VERIZON COMMUNICATIONS
3	L'OREAL	13	KRAFT FOODS
4	FORD MOTOR	14	JOHNSON & JOHNSON
5	TOYOTA MOTOR	15	TIME WARNER
6	GENERAL MOTORS	16	NISSAN
7	VOLKSWAGEN GROUP	17	RECKITT BENCKISER
8	AT&T	18	CHRYSLER
9	MCDONALD'S	19	THE COCA COLA COMPANY
10	NESTLE	20	UNIVERSAL



# METHODOLOGY NOTES



# Methodology

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

The Nielsen Global AdView Pulse reports on advertising expenditure for Argentina, Australia, Brazil, Canada, China, Croatia, Egypt, France, Germany, Greece, Hong Kong, Indonesia, Ireland, Italy, Japan, Kuwait, Lebanon, Malaysia, Mexico, The Netherlands, New Zealand, Norway, Pan-Arab Media, Philippines, Portugal, 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.

*\* Provided by Nielsen CC Data*  
*\*\* AGB Nielsen in association with Ipsos*  
*\*\*\* In association with Media Focus*

The **Media Group** within **Nielsen**, is the data source for the following countries:

- Australia
- Canada
- China\*
- Croatia\*\*
- Germany
- Indonesia
- Ireland (Republic of)
- Italy
- Malaysia
- The Netherlands
- New Zealand
- Norway
- Philippines
- Singapore
- South Africa
- South Korea
- Switzerland\*\*\*
- Taiwan
- Thailand
- Turkey
- United Kingdom
- United States of America



# Methodology

The data sources for the other countries included in the report are:

Argentina:	IBOPE
Brazil:	IBOPE
Egypt:	PARC (Pan Arab Research Centre)
France:	Yacast
Greece:	Media Services
Hong Kong:	admanGo
Japan:	Nihon Daily Tsushinsha
Kuwait:	PARC (Pan Arab Research Centre)
Lebanon:	PARC (Pan Arab Research Centre)
Mexico:	IBOPE
Pan-Arab Media:	PARC (Pan Arab Research Centre)
Portugal:	Mediamonitor
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 2012 (website: [www.imf.org](http://www.imf.org)).

The Nielsen Global Online Survey (source for the Nielsen Consumer Confidence Index), was conducted between May 4 and May 21 2012 and polled more than 28,000 consumers in 56 countries throughout Asia Pacific, Europe, Latin America, the Middle East, Africa and North America

about their confidence levels and economic outlook. The Nielsen Consumer Confidence Index is developed based on consumers' confidence in the job market, status of their personal finances and readiness to spend. The sample has quotas based on age and sex for each country based on their Internet users, is weighted to be representative of Internet consumers, and has a maximum margin of error of  $\pm 0.6\%$ .

Figures are expressed in Million USD and are gross except for Australia, Ireland, and the UK which are estimated net at source, and France, Germany, Greece, Italy, the Netherlands, Spain, Taiwan, and Turkey—to which Nielsen Global AdView estimated weighting factors are applied. 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 2011 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, Internet, Outdoor, and Cinema.
- **Regions:** this section includes spend on Television, Newspapers, Magazines, Radio, Internet, 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:** Croatia, France, Germany, Greece, Ireland, Italy, The Netherlands, Norway, Portugal, Spain, Switzerland, Turkey, United Kingdom.
  - **Latin America:** Argentina, Brazil, Mexico.
  - **Middle East and Africa:** Egypt, Kuwait, Lebanon, Pan-Arab Media, 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, Internet).
- **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.





# Global AdView Pulse

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Quarter 2 2012

## SNEAK PREVIEW

Get a taste of the  
regional and  
country insights  
from the full  
version of Nielsen  
Global AdView  
Pulse

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# Middle East & Africa

## Region Overview

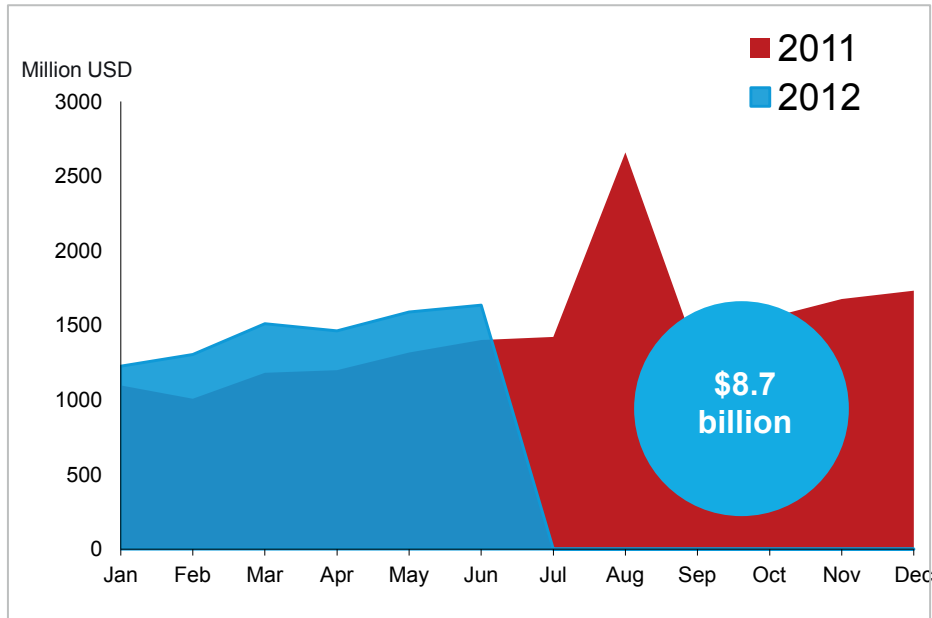
### Highlights

- Ad market posts a 21.1% increase during the first half of 2012—mainly due to a low base of comparison with 1H 2011
- Growth is due to rebound of Egypt ad market and growth of Pan-Arab Media
- Instability still reverberates within the region, as Syria's civil war enters its second year

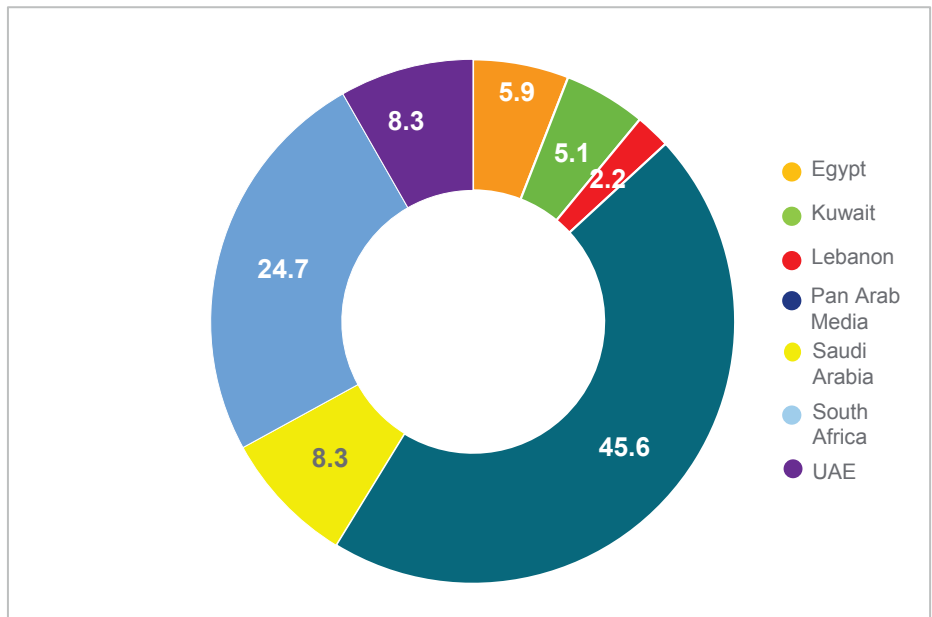
After a particularly difficult political and economic period during the first half of 2011, the Middle East & African ad market during the first half of 2012 shined in comparison—posting a 21.1 percent increase in spending compared with 1H 2011. Main drivers of the growth were the rebounds in the markets of Egypt, up 64.9 percent, and Pan-Arab Media, up 34.4 percent during the first half of 2012.

Instability still reverberates in the region, however, as Syria's civil war has now continued into its second year. Impacts of the instability are immediately reflective in neighboring Lebanon's advertising market, with budget cuts of -3.9 percent seen during the first half of 2012. According to the Pan Arab Research Centre, advertisers are increasingly looking to the multi-market Pan Arab Media for their advertising—seen as a more

### MARKET -- ADVERTISING EXPENDITURE TREND



### COUNTRIES -- % SHARE OF SPEND -- YTD



#### Full report includes:

Regional & Country Trends by Month, Quarter, Media Type, Sector & Category

Top Advertisers by Country and Globally

# South Korea

## Country Overview

### COUNTRY FACTS

**POPULATION**  
49,136,000

**GDP in BILLIONS**  
1,119,965 South Korean Won

**GDP PER CAPITA**  
22,793,334 South Korean Won

**INFLATION**  
3.4 percent

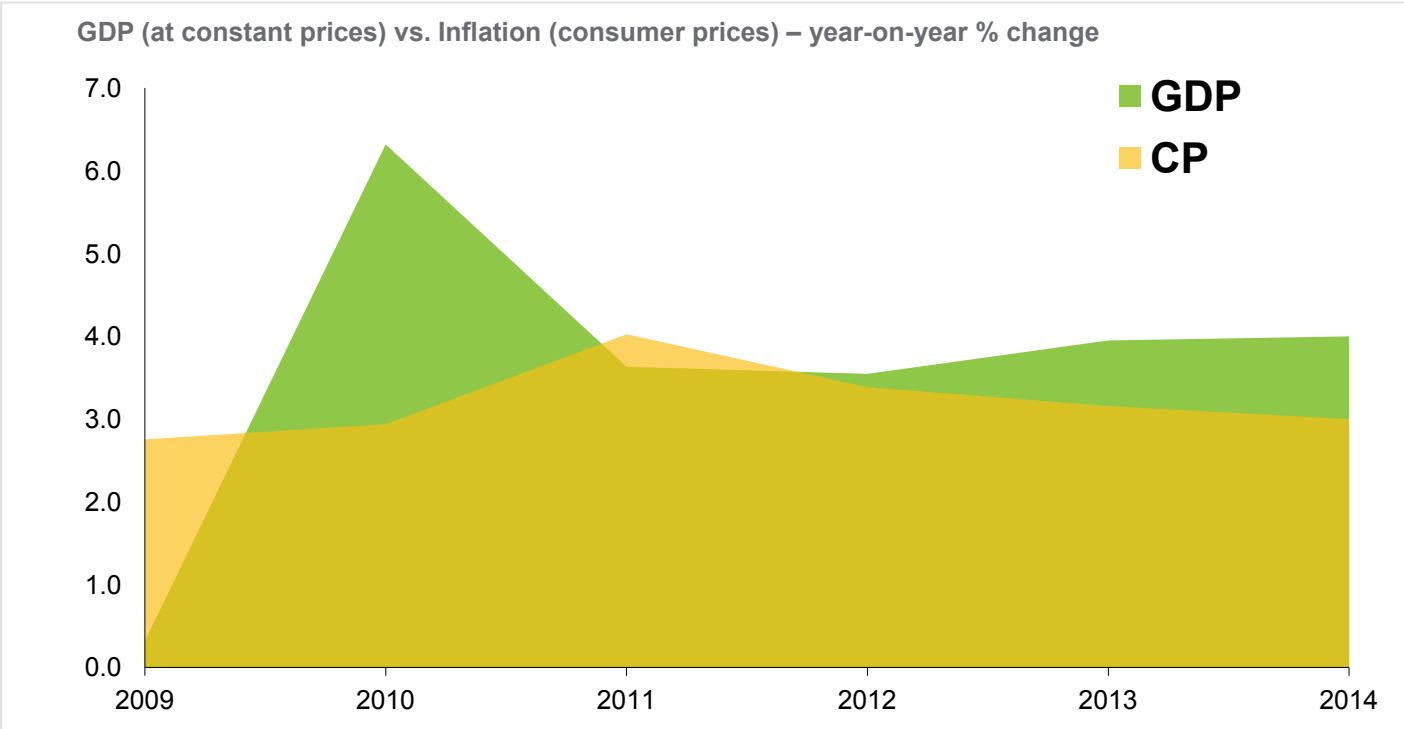
**CURRENCY**  
1 South Korean Won = 0.0009 USD

### CONSUMER CONFIDENCE INSIGHTS



Source: Nielsen Consumer Confidence Index, Q2 2012

### MACRO ECONOMIC TRENDS





# South Korea

## Country Overview

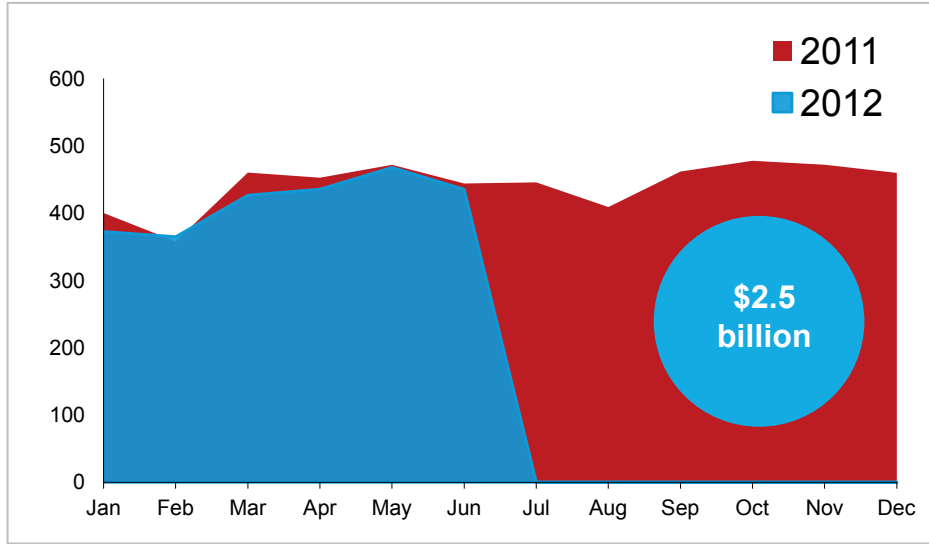
### Highlights

- South Korean economy impacted by Europe's economic woes—Q2 expands a mere 0.4% year-on-year
- Ad market mirrors economic troubles, posting a -3.3% decline in the first half year
- On an optimistic note, a quarter-on-quarter increase of 15% was seen between Q2 2012 and Q1 2012

South Korea's economy expanded 0.4 percent year-on-year during the second quarter of 2012, adversely impacted by Europe's economic woes. According to Reuters, analysts believe that an additional interest rate cut will be required to spur growth, though they neglected to forecast when South Korea's economy would begin to recover.

The advertising market mirrored the troubles in the economy, posting a -3.3 percent decline in spending during the first half of 2012. On a more optimistic note, a quarter-on-quarter increase of 15 percent was seen between Q2 2012 and Q1 2012.

### ADVERTISING EXPENDITURE TREND



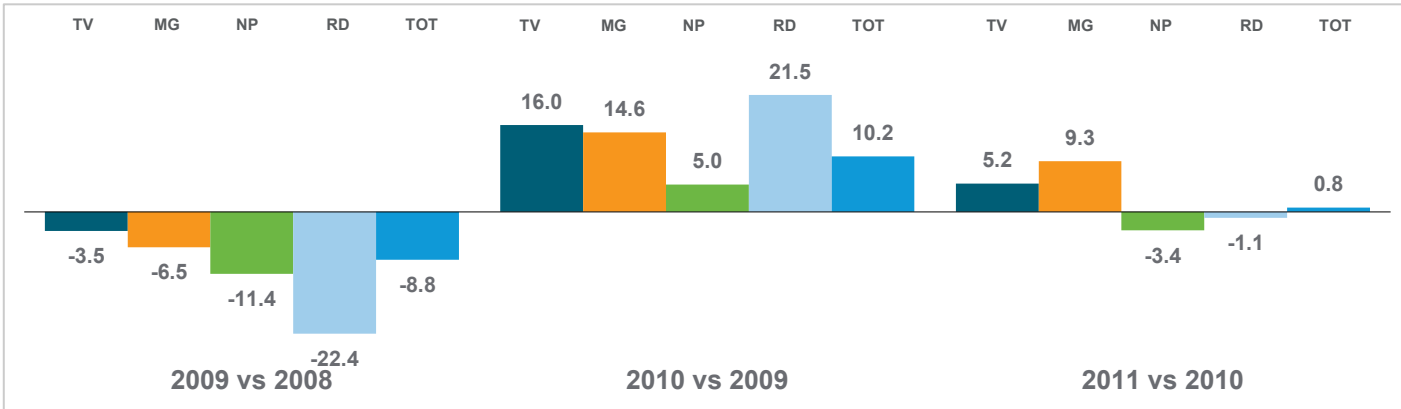
### METHODOLOGY

- Media covered: Television, Newspapers, Magazines, Radio
- Figures: gross
- Cost estimates are calculated at rate card

### NOTES

- No change in coverage or methodology for this quarter

### Advertising – Year-on-year % change by Media





# Global AdView Pulse

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Quarter 2 2012

## What you get 4 times a year:

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# NIELSEN GLOBAL ADVIEW



# Contact

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## 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.

## Media Group

One of the major businesses of Nielsen, the Media Group is active in 40 markets offering television, radio and outdoor audience measurement, print readership, advertising information services and customized media research. The Media Group of Nielsen is the recognized market standard for media information in the largest advertising territories. Thanks to the local presence of our own branches in more than 20 of the world's leading advertising markets (including North America, Europe, Asia Pacific and Africa) we can measure expenditure and creatives daily, providing an always open window on the world of media.

## 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, mobile measurement, trade shows and related properties. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands. For more information, please visit [www.nielsen.com](http://www.nielsen.com).



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