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global advertising trends  
Quarter 4 2011

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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



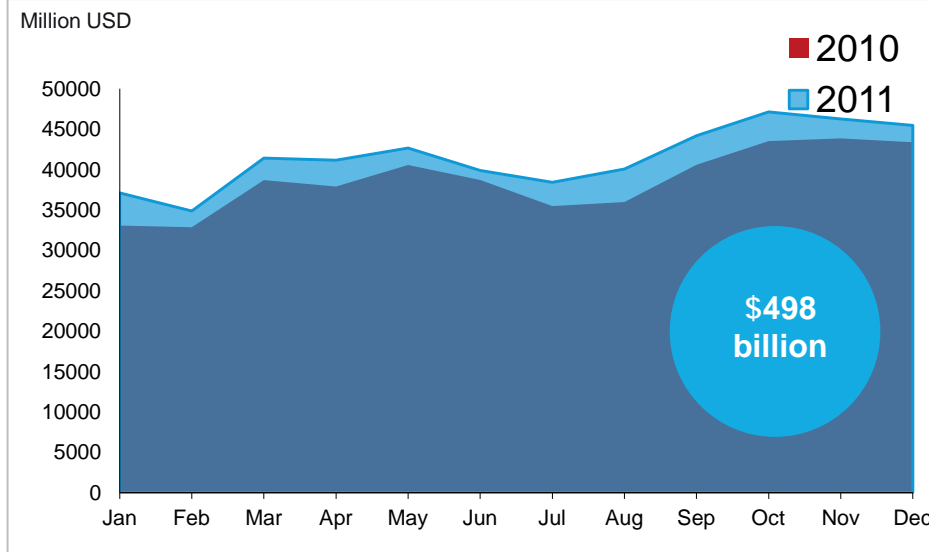
# Global Advertising Trends

Year to date

## Main Events

- Global online consumer confidence finally shows a gain of 1 point, after seven consecutive quarters of decline
- The eurozone debt crisis has a domino effect on many countries, particularly in regard to local export markets
- Standard & Poor downgrades the U.S.' AAA credit rating in Q3, though the U.S. economy performs better than expected in Q4

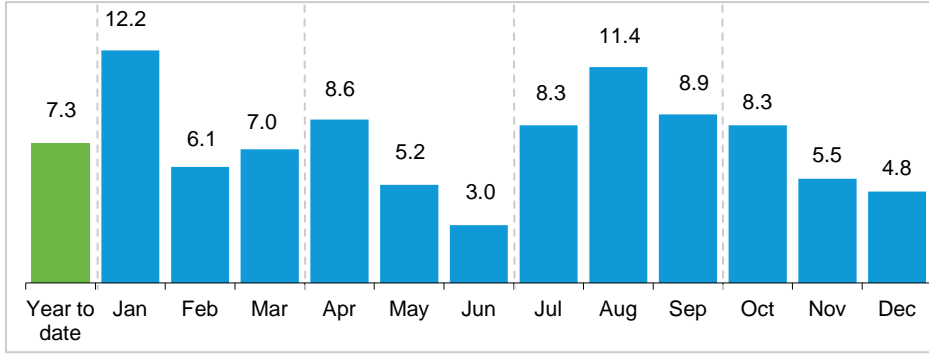
## ADVERTISING EXPENDITURE TREND



## Main Facts

- After a boost in ad spending during Q3, advertisers show more caution in Q4, though 2011 still shows a 7.3% increase in spending vs. 2010
- Both North America and Europe show declines in ad spend year-on-year for Q4, with the FMCG market cutting ad budgets
- Looking at the whole of 2011 vs. 2010 however, North America shows a marginal increase in ad spending, while Europe declines by -0.4%

## YEAR ON YEAR % CHANGE BY MONTH



Note: media included in the global overview: Television, Newspapers, Magazines and Radio

## MACRO ECONOMIC TRENDS

- GDP (constant prices)\* + 4.0%
- Consumer Prices\*\* + 5.0%
- Nielsen Consumer Confidence Index: 89\*\* (+1 compared to Q3 2011)

\*2011 vs 2010 forecasts  
\*\*Q4 2011 survey

# 2011 closes with a 7.3% increase in global ad spend

2011 was a difficult year for the global economy, which was impacted by natural disasters, political uprisings, and the ripple effects of financial crises in both the U.S. and Western Europe.

With Standard & Poor's downgrade of the U.S.' AAA credit rating and the worsening eurozone sovereign debt crisis, it is no surprise that overall consumer confidence levels fell in 60 percent of global markets measured in Nielsen's Q4 2011 Consumer Confidence Index. Though consumer confidence around the world increased one point to 89, confidence

notably declined in 24 of 27 European markets.

The sentiment seemed to translate directly to the European advertising market, which decreased spending by -0.4 percent in 2011 compared with 2010.\* Not surprisingly, though many Northern European advertising markets measured in this report marginally increased spending during 2011, larger decreases were seen in the Southern European markets of Greece (-13.1%), Italy (-4.0%), and Spain (-9.7%).

Though advertising in North America increased by a mere 1.8 percent in 2011 and showed a -0.6 percent decline year-on-year during Q4, there are signs that 2012 will be a better year for the advertising market. Consumer confidence jumped 6 points in the U.S. during the fourth quarter to 83 points, and the U.S.

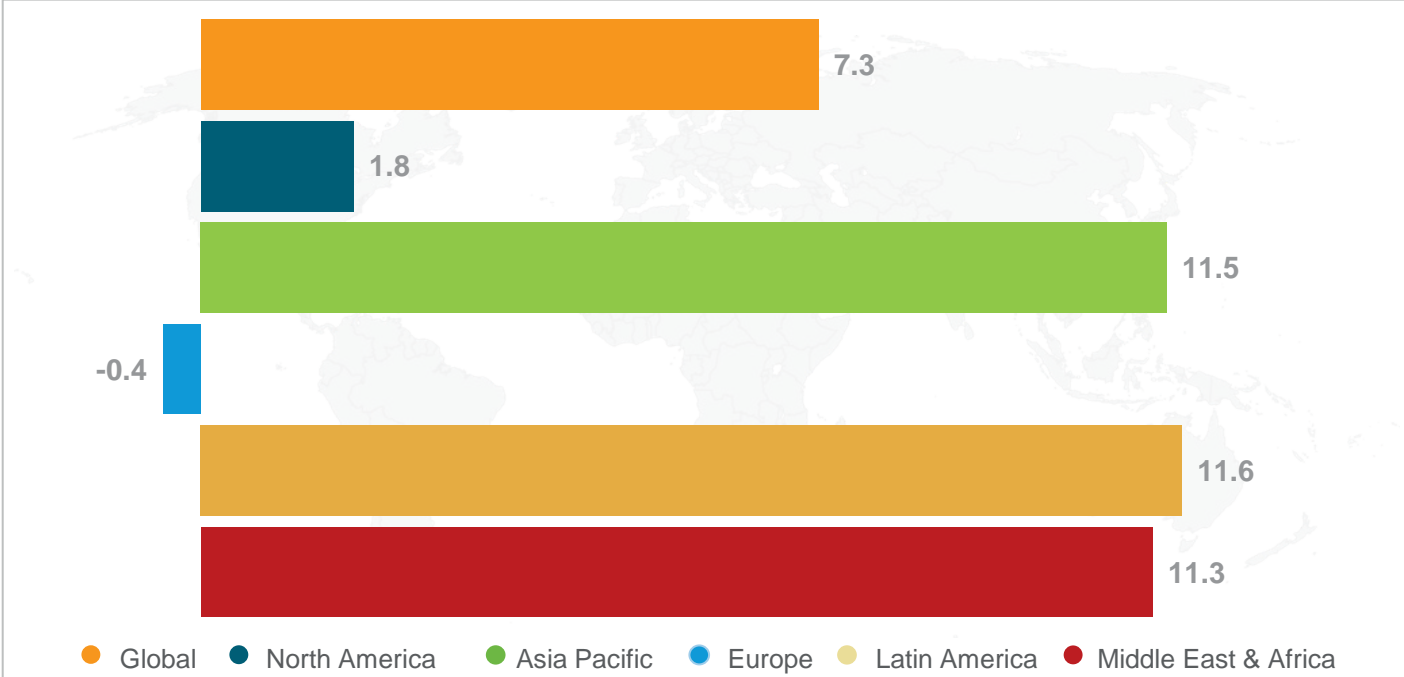
economy performed better than expected.

"While Europe's challenging economic conditions in the second half of 2011 bought renewed vulnerability and fragility to consumers and financial markets globally, some of the most positive news last quarter came from the world's two largest economies—the U.S. and China—where confidence rebounded to Q1 2011 levels," said Dr. Venkatesh Bala, Chief Economist at The Cambridge Group, a part of Nielsen.

With U.S. presidential elections, the European Cup, and the London Olympics taking place later this year, analysts feel that advertisers will regain confidence and ad spending will see healthy increases in 2012.

\* based mainly on published rate cards and the four major media types

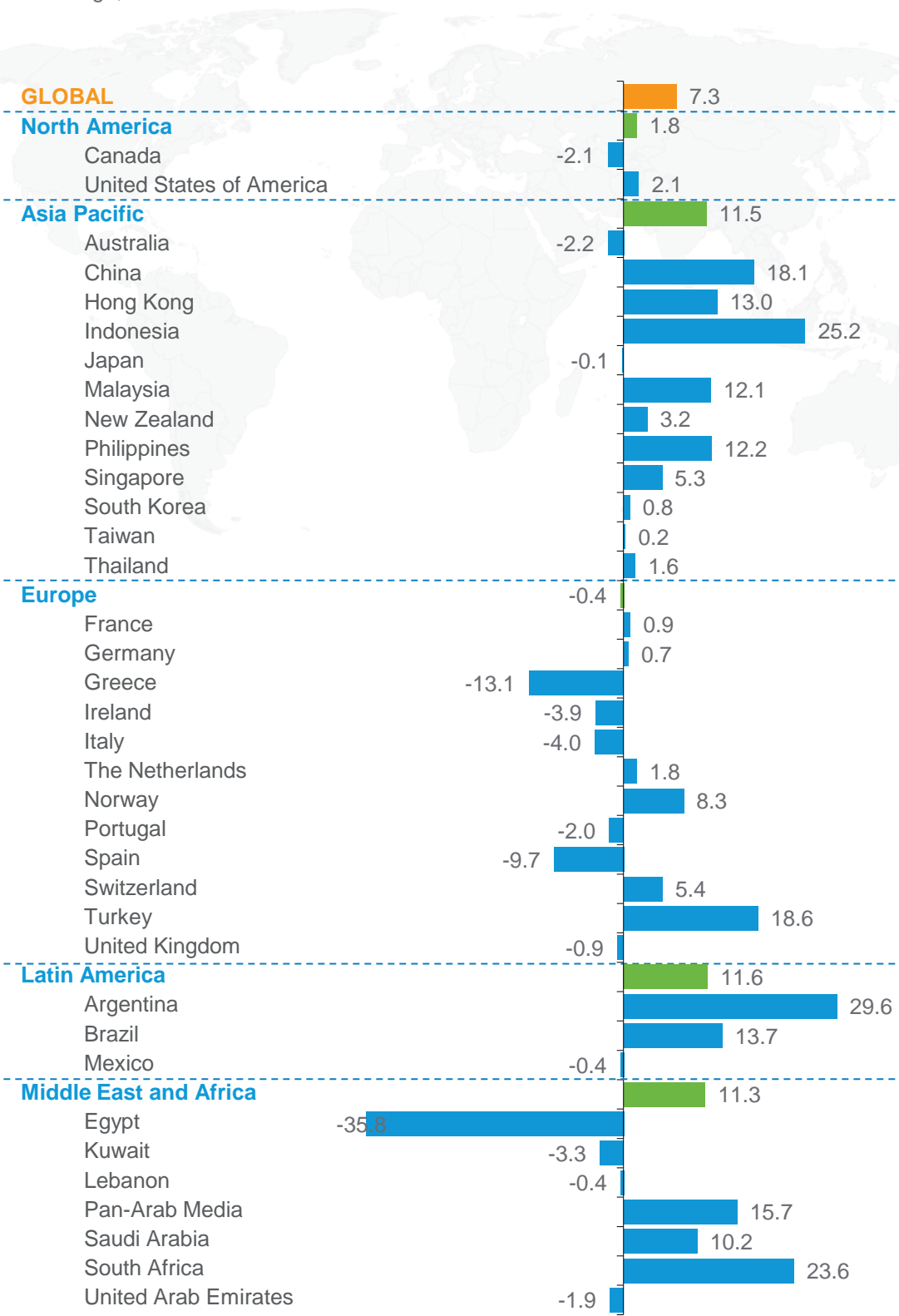
REGIONS -- YEAR ON YEAR % CHANGE





# GLOBAL TREND – OVERVIEW BY REGION AND COUNTRY

Year on Year % Change, YTD







## Media Types – Four Major

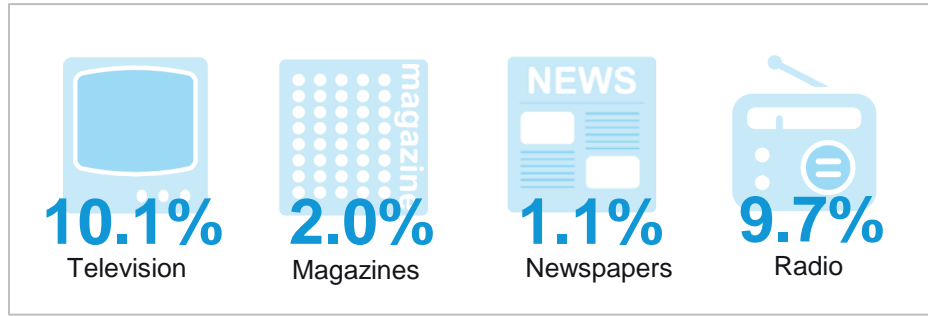
When looking at the trends of 2011 vs. 2010, all four major media types showed positive trends globally—with Television and Radio seeing the highest percentage increases of 10.1 percent and 9.7 percent respectively.

Television ad spend, which holds a 65.1 percent share of ad spending, grew in all regions—including the embattled European region.

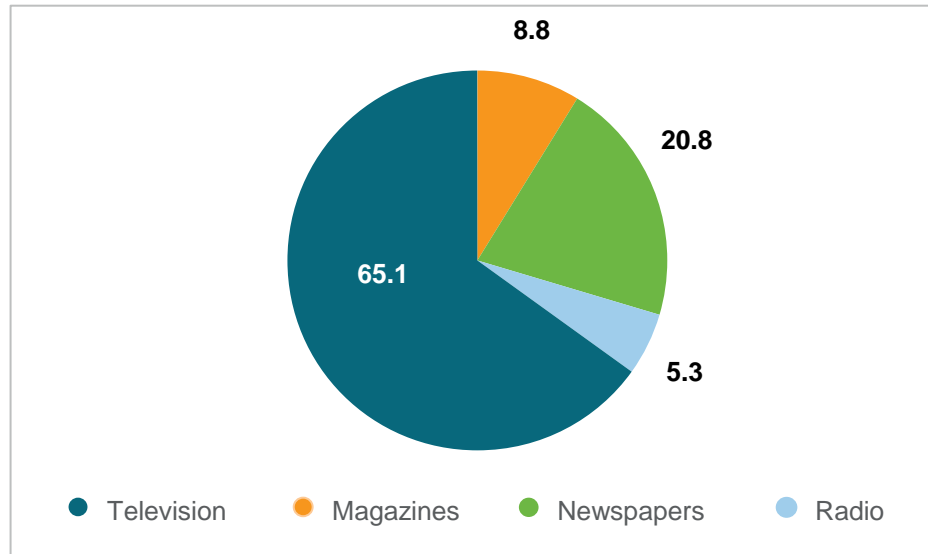
Press ad spending suffered in the mature markets of North America and Europe—consistent with trends seen earlier this year.

More surprisingly, Newspaper ad spending also suffered in the Middle East & Africa, a region of which had previously reported slight growth. This is in large part to significant declines in Newspaper spending from Egypt and Pan-Arab Media. Both advertising markets suffered greatly due to the political turmoil experienced earlier in the year.

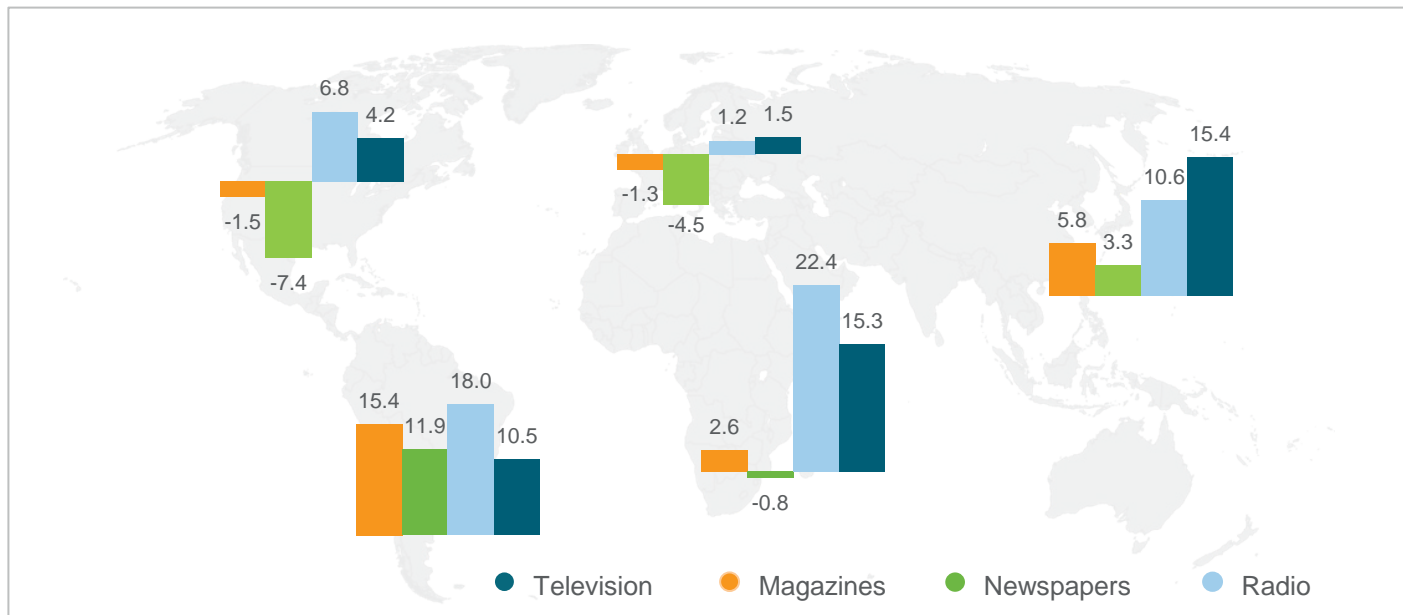
## MEDIA -- % CHANGE YEAR TO DATE



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



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





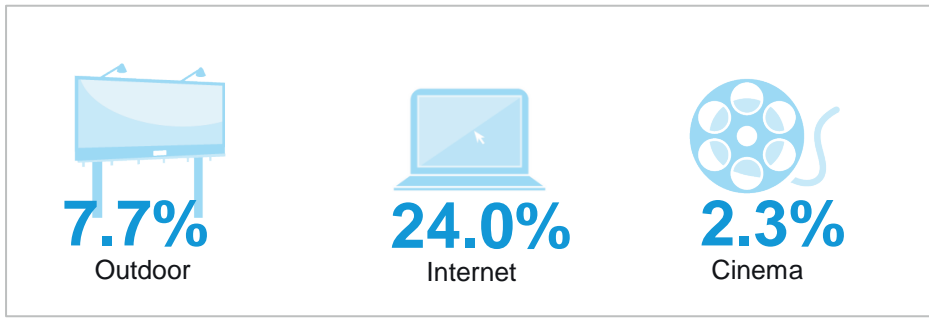
### Media Types - Additional

Ad spending for the Internet, Outdoor, and Cinema media types all showed increases in 2011 when compared with 2010.

Internet ad spending, which grew by 24.0 percent in 2011 vs. 2010, saw increases in almost all markets measured in this report—despite budget cuts for traditional media in some markets.

Analysts have forecasted that Internet ad spending will continue to expand exponentially—with some analysts going so far as predicting that Internet ad spend will top Newspaper ad spend by 2013.

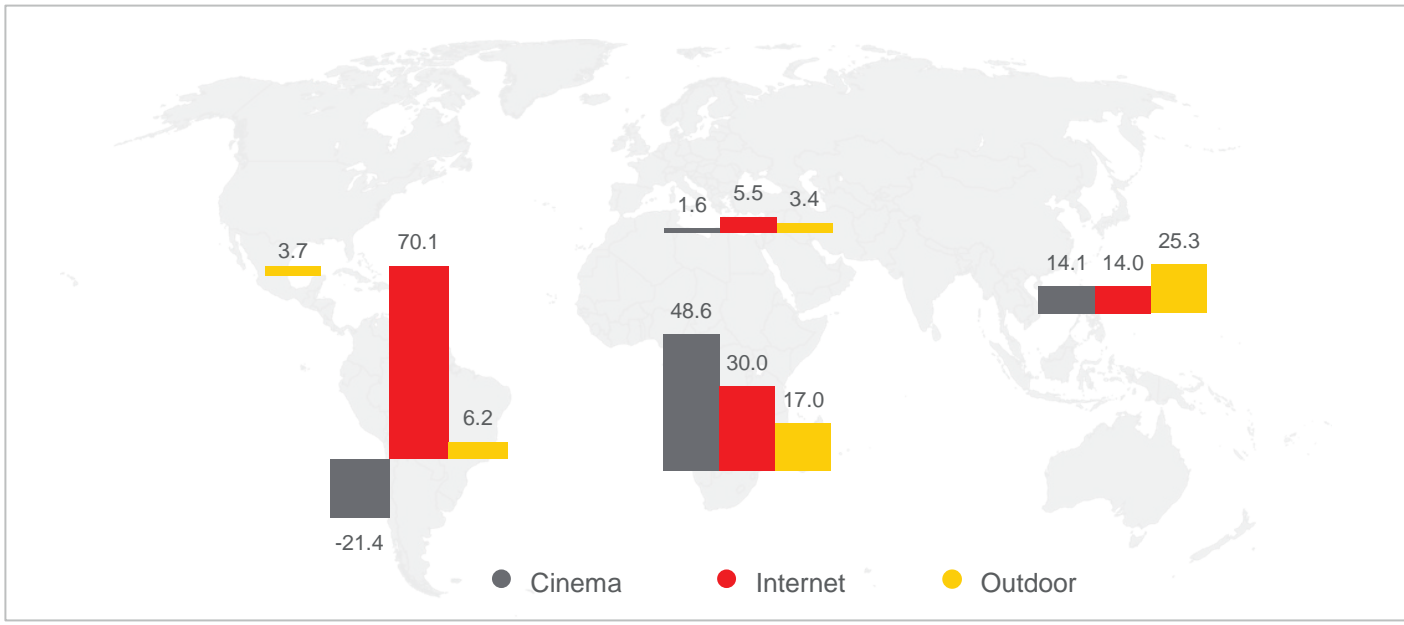
### MEDIA -- % CHANGE YEAR TO DATE



### NOTE:

Global trends for these media types should be taken only as an indication, as they are based on a smaller subset of countries for which data is available.

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





### Macro Sectors

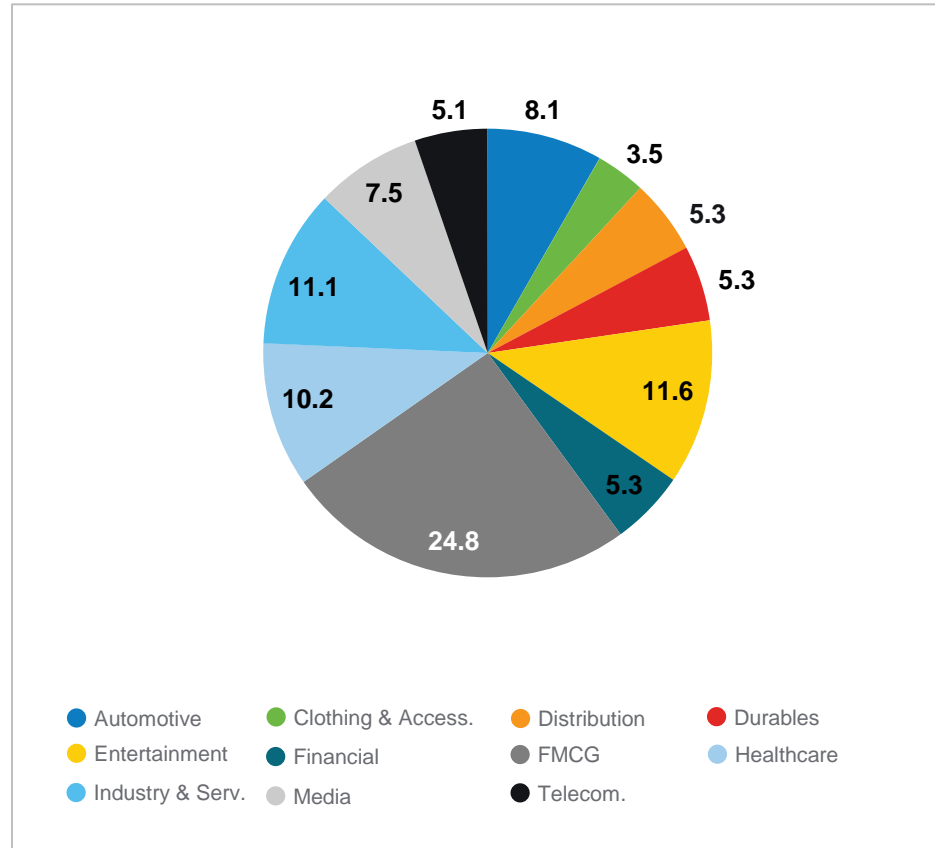
Ad spending within the macro sectors mirrored the volatility of the market throughout 2011.

After a general increase in ad spending seen in the third quarter, advertisers appeared to adopt a more conservative approach in spending during the fourth quarter.

This conservatism was clearly evident in the FMCG sectors in North America and Europe, which posted decreases in 2011 ad spend of -3.1 and -3.8 percent respectively.

On the other side of the spectrum, Clothing & Accessories, a minor spending category with a 3.5 share of spend, saw increases in ad expenditures in all regions—most notably in the Asia Pacific with a 28.4 percent increase.

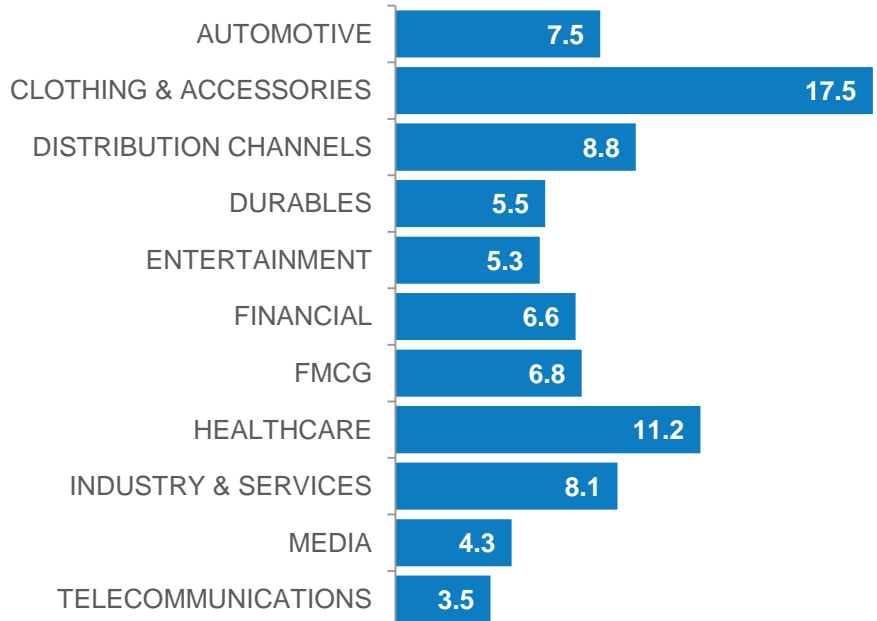
### SECTORS -- % SHARE OF SPEND -- YEAR TO DATE



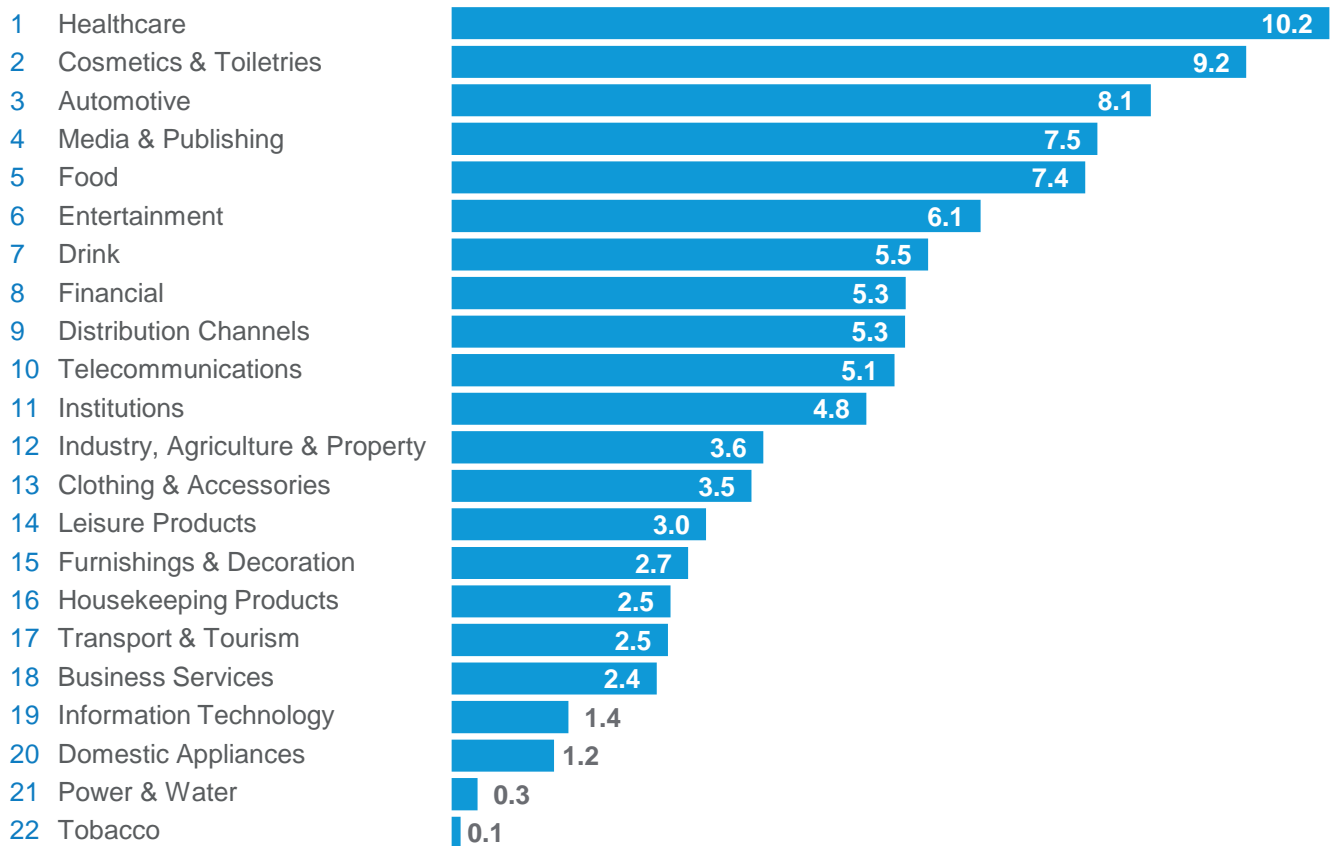
### SECTORS -- % CHANGE YEAR TO DATE

#### HEALTHCARE increases ad spend by 11.2% in 2011

Healthcare, with a 10.2 percent share of spend, grew in the double-digits—by +11.2 percent when compared to 2010



## CATEGORIES RANK AND % SHARE OF SPEND, YTD







# 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, 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.

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

- Australia
- Canada
- China
- 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 September 2011 (website: [www.imf.org](http://www.imf.org)).

The Nielsen Global Online Survey (source for the Nielsen Consumer Confidence Index), was conducted between November 23 and December 9, 2011 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 2010 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 and Radio.
- **Internet, Outdoor and Cinema:** this section intends to give an overview of the global trend of these media types for the territories in which they are covered. The advertising expenditure on this media is not included in the total for the global trend as the scattered coverage, would make the comparison inconsistent.
- **Regions:** this section includes spend on Television, Newspapers, Magazines and Radio. 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:** 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.





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Global AdView  
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# Middle East & Africa

## Region Overview

### Highlights

- Ad market in the Middle East & Africa ends 2011 with a 11.3% increase in spend vs. 2010
- South Africa and Pan-Arab Media continue to reign as top ad investment markets
- The Automotive market reports a -10.5% decrease in 2011 spending—though it was the only macro sector to report a decline

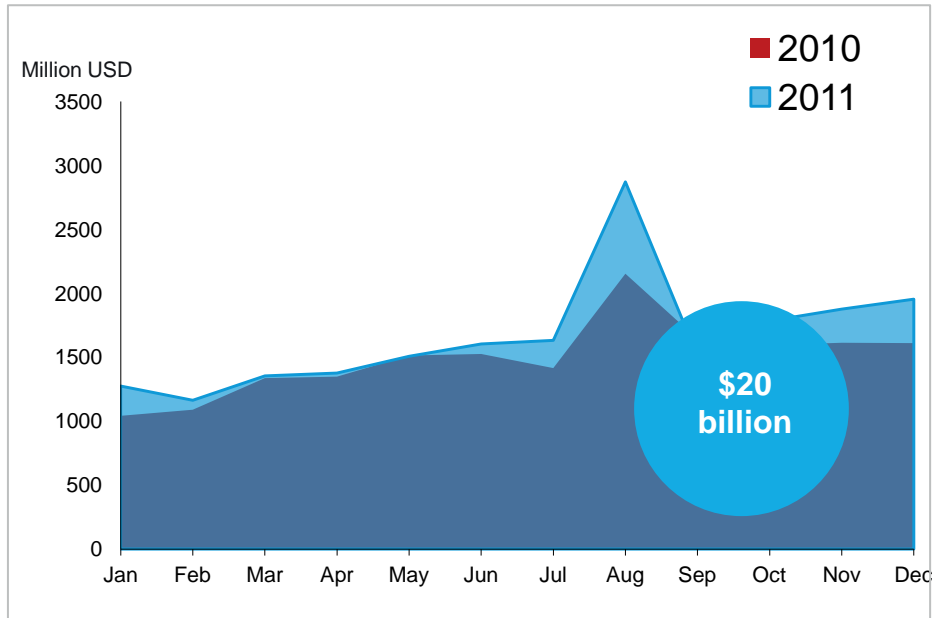
After a difficult start of 2011, rife with political uprisings throughout the region, advertisers within the Middle East and Africa again gained confidence in the market at the end of the year.

In the fourth quarter of 2011, advertising spend increased by 16.5 percent vs. Q4 2010, with an 11.3 percent increase for the whole year 2011 vs. 2010.

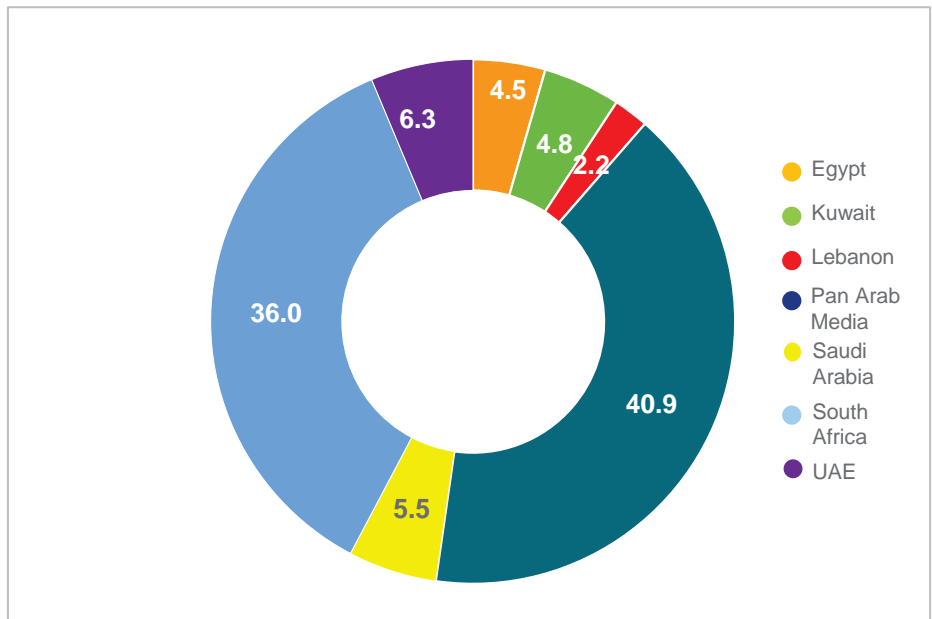
Markets commanding the majority of ad spending continued to be South Africa and Pan-Arab Media, with Egypt's ad market unable to fully recover from the hard hit it experienced in the first half of the year.

Throughout the Arab Spring, the ad market in Saudi Arabia remained largely unaffected, posting an 11.2 percent increase in spend in 2011.

### MARKET -- ADVERTISING EXPENDITURE TREND



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



Note: media included in the region overview: Television, Newspapers, Magazines and Radio

### Full report includes:

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

Top Advertisers by Country and Globally

# Australia

## Country Overview

### COUNTRY FACTS

#### POPULATION

22,504,000

#### GDP in BILLIONS

1,324 Australian Dollars

#### GDP PER CAPITA

58,827 Australian Dollars

#### INFLATION

3.5 percent

#### CURRENCY

1 Australian Dollar = 0.91994  
USD

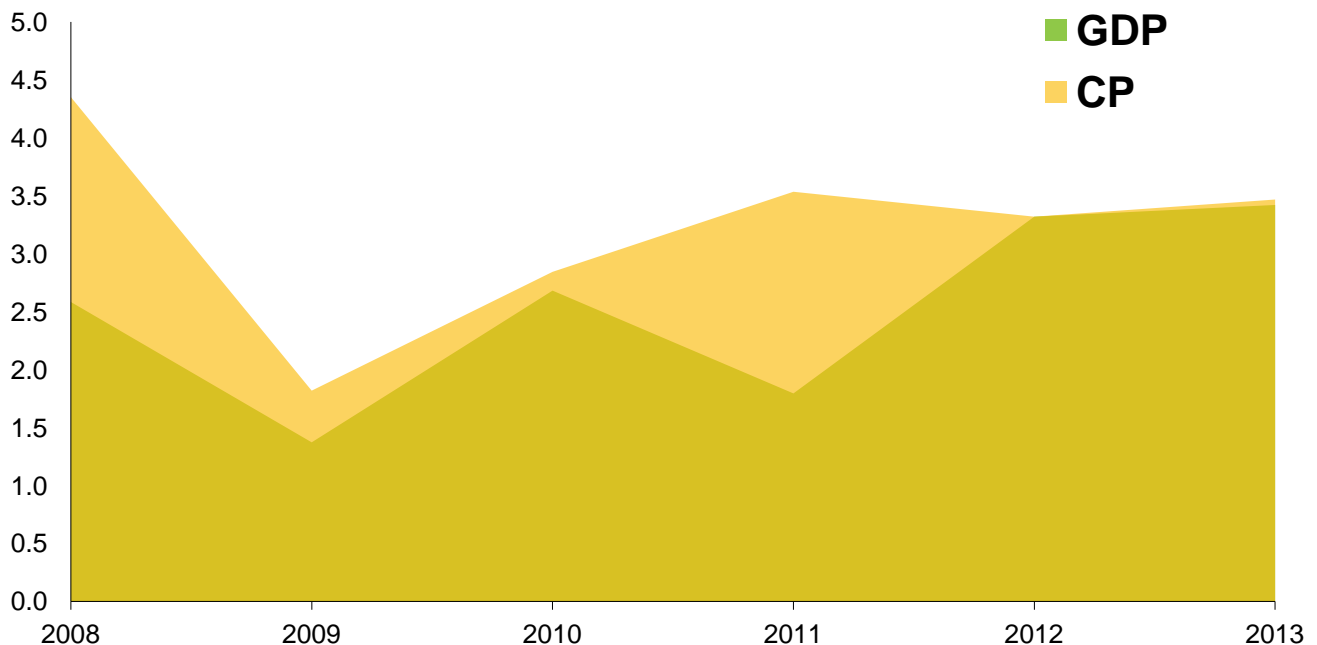
### CONSUMER CONFIDENCE INSIGHTS



Source: Nielsen Consumer Confidence Index, Q4 2011

### MACRO ECONOMIC TRENDS

GDP (at constant prices) vs Inflation (consumer prices) – year-on-year % change





# Australia

## Country Overview

### Highlights

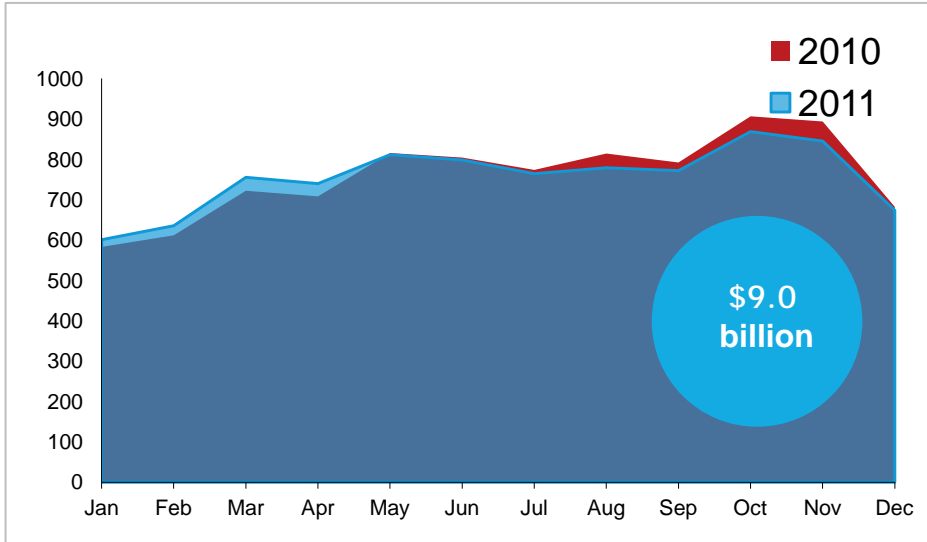
- Australian economy grows slower than expected in Q4
- Consumer confidence still remains high—posting gains on Q3
- Advertising, on the other hand, shows a slight decline of -0.7% in 2011 vs. 2010

Australia's economy grew slower than expected in Q4 2011, recording a mere 0.4 percent growth against Q3, and a +2.3 percent growth year-on-year.

According to the Australian Bureau of Statistics, growth was anticipated as 0.8 percent and 2.4 percent respectively. The culprit of the slowdown was said to be the soaring Australian dollar and the European financial crisis, which negatively impacted the Australian economy despite the central bank's efforts to cut interest rates.

In the face of the economic slowdown, advertising spend showed negative growth for 2011 against 2010, recording a small decline of -0.7 percent.

### ADVERTISING EXPENDITURE TREND



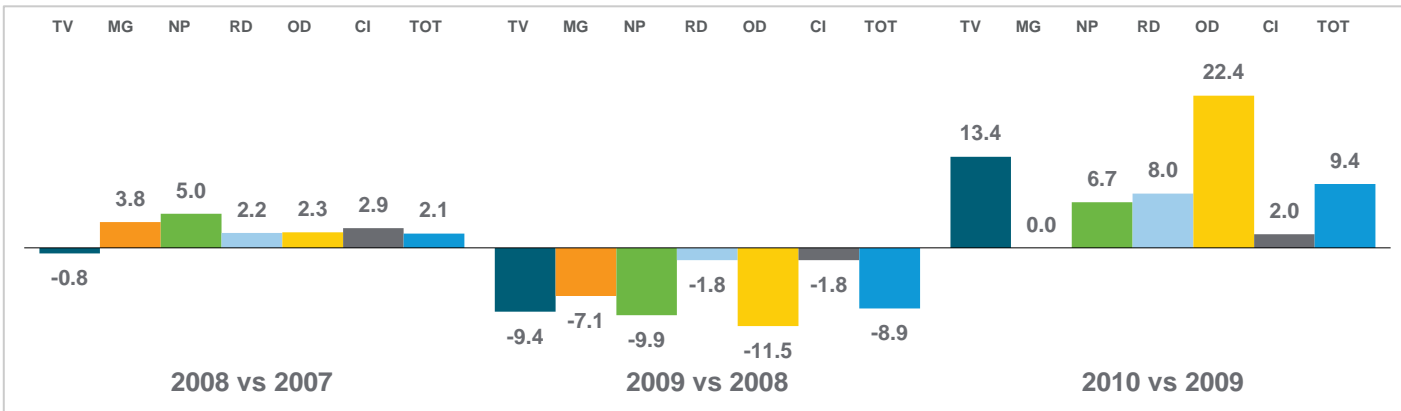
### METHODOLOGY

- Media covered: Television, Newspapers, Magazines, Radio, Outdoor, Cinema, Internet
- Figures: estimated net at source
- Discounts are assigned by advertiser and/or by agency across all media types and revised annually

### NOTES

- No change in coverage or methodology for this quarter

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





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# NIELSEN GLOBAL ADVIEW



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## Nielsen Global AdView

Nielsen Global AdView provides international advertising services. Nielsen Global AdView provides information on what an advertiser's competitors are spending, where and how, in more than 80 countries, along with a deep and complete knowledge of local market advertising trends. Spend and creative content 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.

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