



# Global AdView Pulse

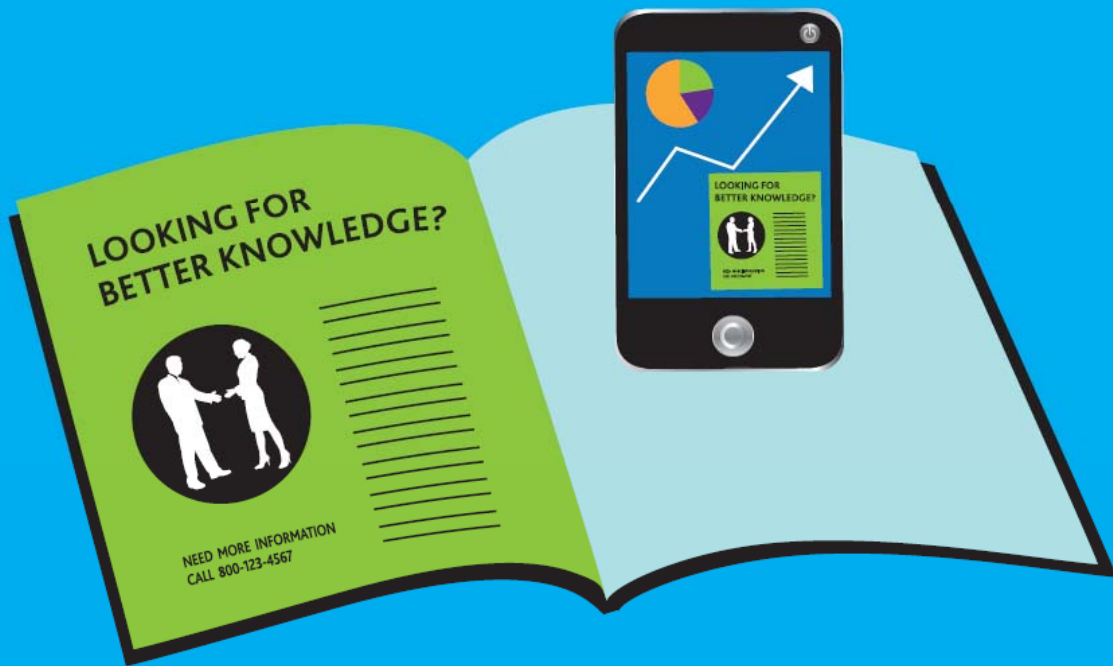
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global advertising trends  
Quarter 3 2011

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Quarter 3 2011

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# Table of Contents

<b>World Trends – Year to Date</b>	<b>7</b>
<b>World Trends – Quarter</b>	<b>15</b>
<b>Regional Overview</b>	<b>23</b>
<b>North America</b>	<b>24</b>
<b>Asia Pacific</b>	<b>27</b>
<b>Europe</b>	<b>30</b>
<b>Latin America</b>	<b>33</b>
<b>Middle East &amp; Africa</b>	<b>36</b>
<b>Methodology</b>	<b>39</b>
<b>About Nielsen Global AdView</b>	<b>48</b>
<b>Sneak Preview</b>	<b>50</b>





# World Trends

Year to date

# Global Advertising Trends

## Year to date

## World Trends

Main Events	Main Facts
<ul style="list-style-type: none"> <li>The eurozone debt crisis worsens, having a domino effect on economies around the world</li> <li>Standard &amp; Poor downgrades the US' AAA credit rating, with France also at risk</li> <li>Global online consumer confidence falls for the seventh consecutive quarter, as a recessionary mindset grows amongst consumers</li> </ul>	<ul style="list-style-type: none"> <li>Ad spend growth picks up again in Q3, recording a 9.6% increase vs Q3 2010 and a 8.1% increase when comparing January to September 2011 to the same period in 2010</li> <li>All four major media types show healthy growth, with Radio (16.2%) overtaking TV (12.6%) with the highest percentage growth during Q3</li> <li>Double-digit increases in spending are seen in 6 of 11 macro sectors during Q3</li> </ul>

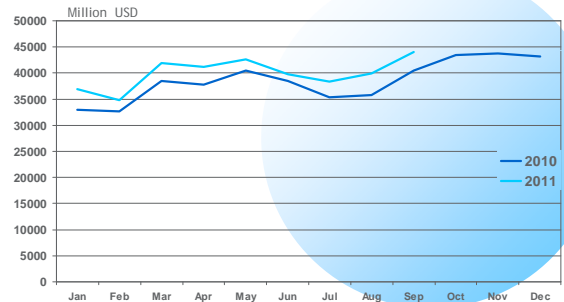
### Macro Economic Trends

- GDP (constant prices)\*\* + 4.0%
- Consumer Prices\*\* + 5.0%
- Nielsen Consumer Confidence Index\*: 88 (-1 compared to Q2 2011)

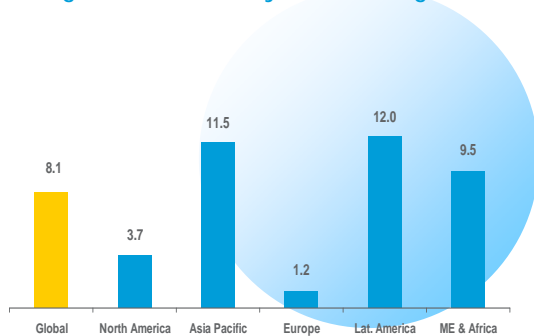
\*\*2011 vs 2010 forecasts

\* Q3 2011 survey

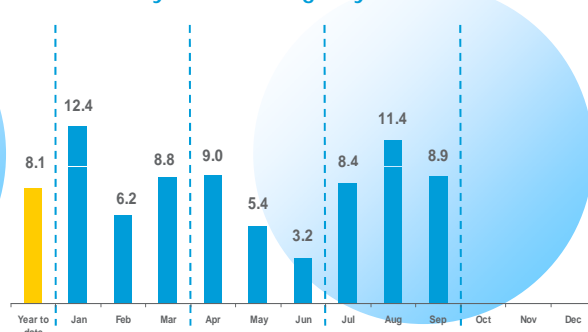
### Advertising Expenditure Trend



### Regions -- Year on year % change



### Year on year % change by month



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



The third quarter of 2011 was a volatile one for global economies, with Standard & Poor's downgrade of the US' AAA credit rating, and the worsening eurozone debt crisis. Global online consumer confidence fell for the seventh consecutive quarter according to the third quarter global online consumer confidence findings from Nielsen, with over half consumers surveyed saying that they are currently in a recession—up four percentage points from last quarter and seven points from the start of the year.

Against the backdrop of the very tumultuous start of 2011, however, the advertising market in the third quarter posted better year-on-year performance than both the first and second quarters. Advertising spend grew 9.6 percent during the third quarter—up from the 5.8 percent recorded in Q2, and 9.1 percent growth seen in Q1. When comparing the January to September period against the same period in 2010, ad spending grew by 8.1 percent.

Europe's ad market, which posted a small decline in spending during the second quarter, rebounded slightly during Q3, posting flat spending of 0.3 percent despite the unfolding economic crisis. Though cautious spending still continues, the dramatic double-digit decreases seen in Greece, Spain, and Turkey during the second quarter were more tempered in the third, at -5.9 percent, -9.0 percent, and -9.2 percent respectively.

Major markets of France (+4.1%), Germany (+0.6%), and the UK (+1.1%) propped the market up with small increases in ad spend during the third quarter. Year-to-date, Europe ended the first three quarters of 2011 with a 1.2 percent increase in spending.

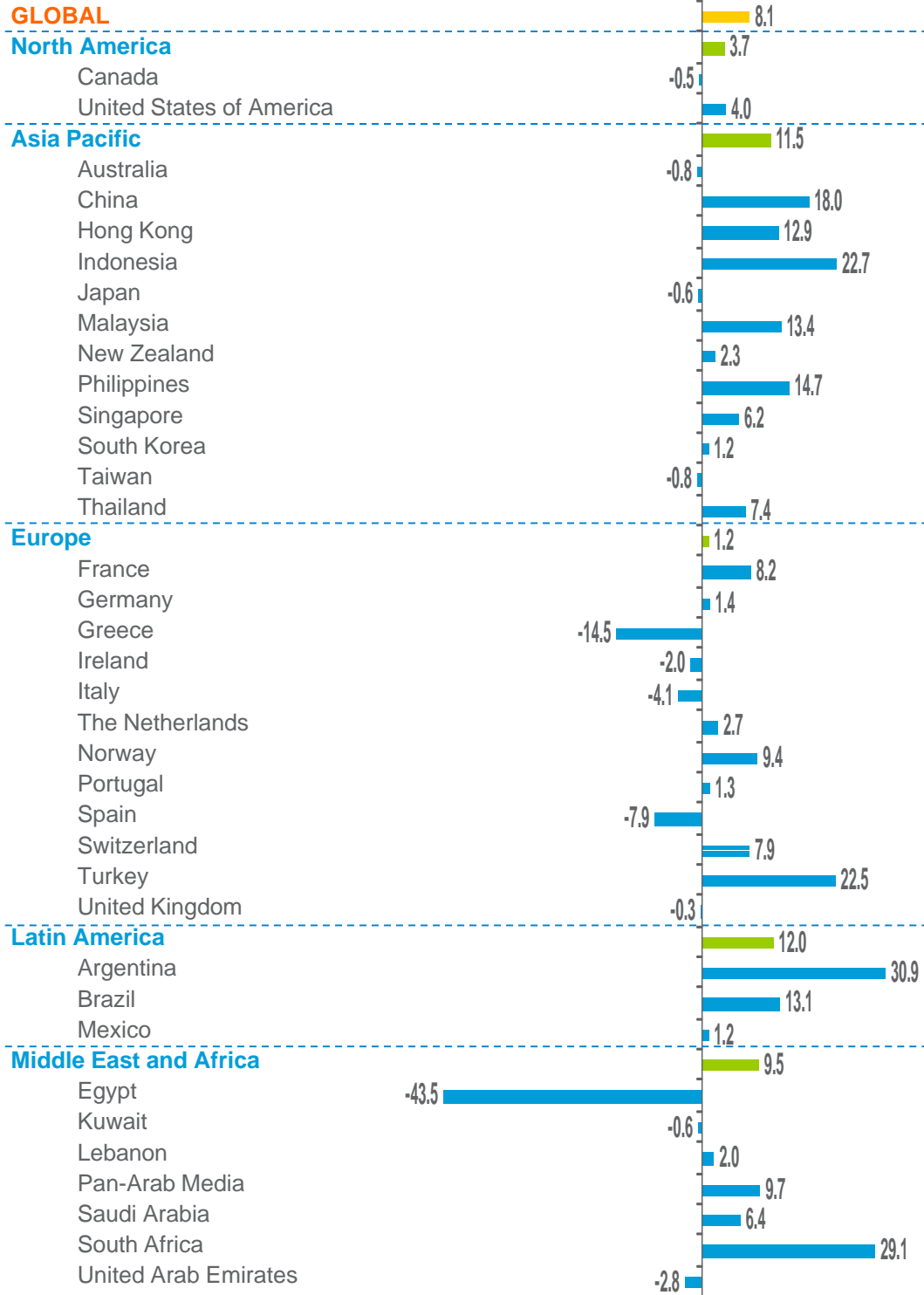
The ad markets in the Asia Pacific (+12.9%), Latin America (16.9%), and Middle East & Africa (15.7%) posted double-digit increases during Q3—all higher gains than experienced in Q2. The Middle East market, slammed hard by the impacts of the Arab Spring, rebounded strongly from the +2.2 percent growth seen in the second quarter.

All four major media types reported increases in ad spending during the third quarter, with Television as the dominant media type, reporting a 12.6 percent increase in spending for Q3, and a 10.8 percent increase year-to-date.

FMCG, a major contributor to advertising spend, still suffered from ad budget cuts in North America (-2.8%) and Europe (-4.9%), though it globally contributed 8.7 percent more ad spend in the third quarter of 2011 when compared with Q3 2010.

## Global trend - overview by region and country

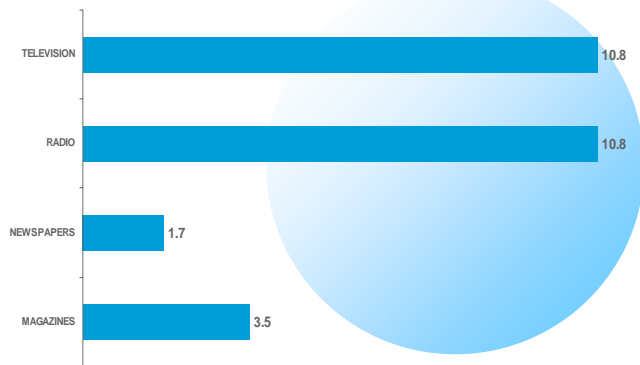
Year on Year % change



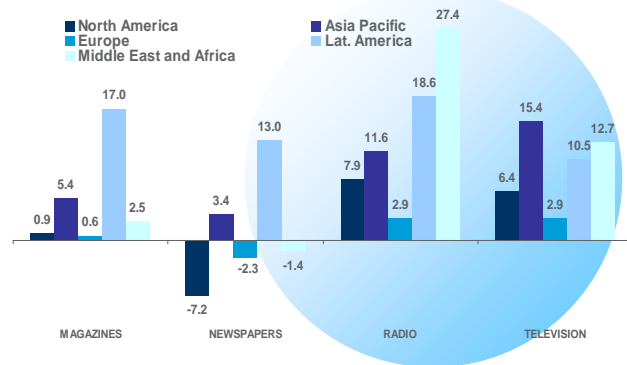
## Media Types

The four major media types showed positive trends globally during the first three quarters of 2011, with Television and Radio both seeing 10.8 percent increases in advertising expenditure when comparing January to September 2011 with the same period of 2010. Television, which held 63.5 percent of spend in the first three quarters of 2010, now holds 65.1 percent of spend amongst the other main media types—though some analysts believe that Television ad spending growth will begin to stall in the coming three years. Double-digit increases in Television ad spending were seen in the Asia Pacific, Latin America, and the Middle East & Africa, with more mature markets such as Europe (+2.9%) and North America (+6.4%) also posting increases in TV expenditure. Magazines reported a positive trend at 3.5 percent, and Newspapers reported a growth of 1.7 percent—though experiencing declines in both North America (-7.2%) and Europe (-2.3%).

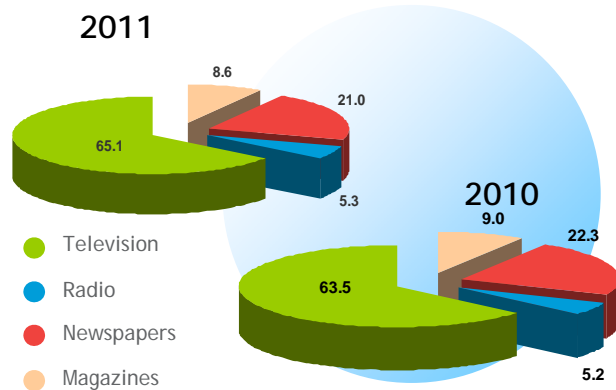
Media -- % change year to date



Media by Region -- % change year to date



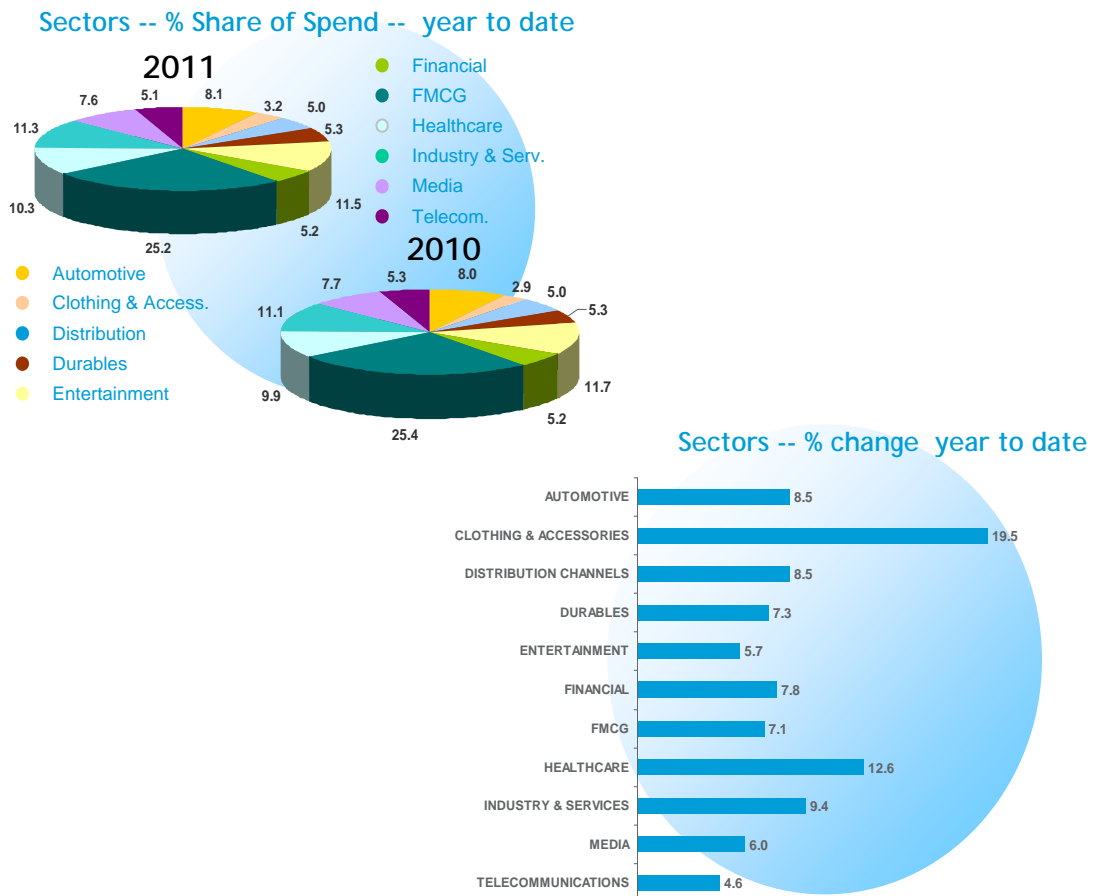
Media -- % Share of Spend -- year to date



## Macro - Sectors

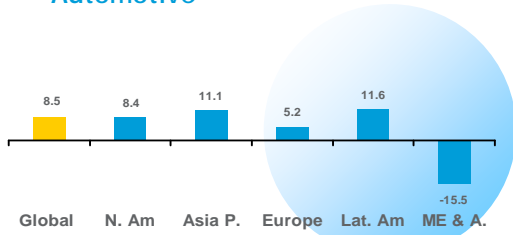
After more cautionary spending in the second quarter, ad spending in the macro sectors generally increased in the third quarter, positively impacting the trends for the sectors for the period January to September 2011 vs the same period in 2010. Ad spending for the sector with the highest share of spend, FMCG, grew by 7.1 percent from January to September 2011, though decreases in spending were seen in North America (-1.4%) and Europe (-2.9%). Year-to-date, FMCG ad spend represented 25.2 percent of all ad spending; in the same period of 2010, this figure was 25.4 percent.

Clothing & Accessories (albeit representing only a 3.2% share of spend) continued its ad spending spree, spending 19.5 percent more on advertising in the first three quarters of 2011 vs 2010. Healthcare, with a 10.3 percent share of spend, also grew in the double-digits—by +12.6 percent when compared to January to September 2010.

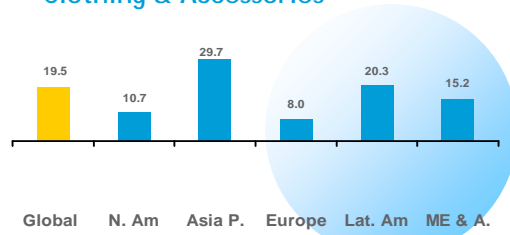


## Macro - Sectors: % change by Region

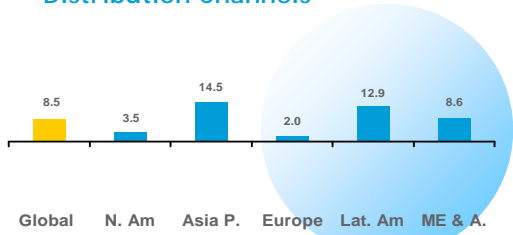
### Automotive



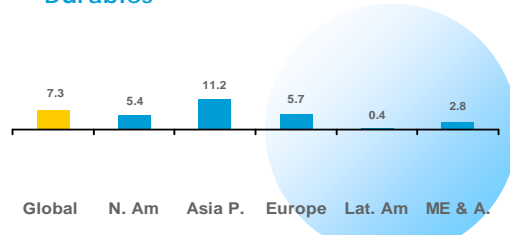
### Clothing & Accessories



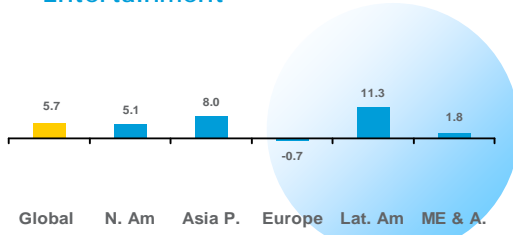
### Distribution Channels



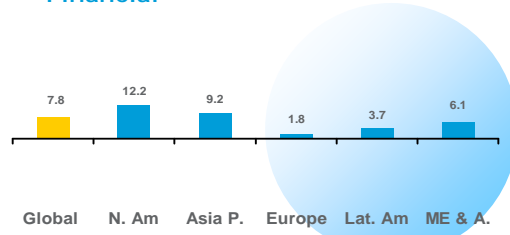
### Durables



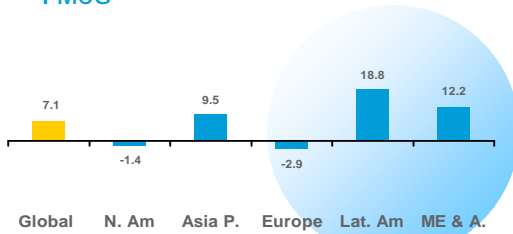
### Entertainment



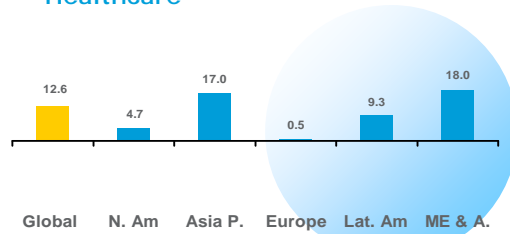
### Financial



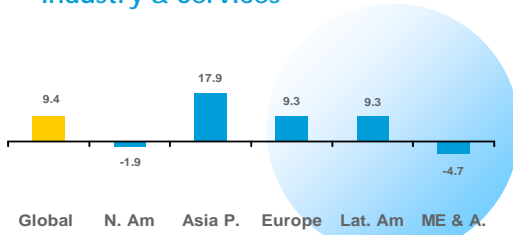
### FMCG



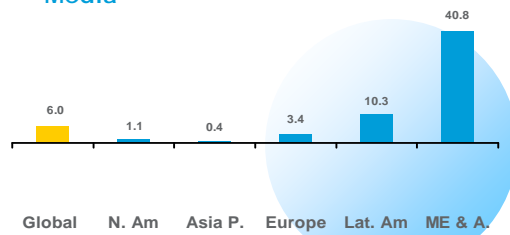
### Healthcare



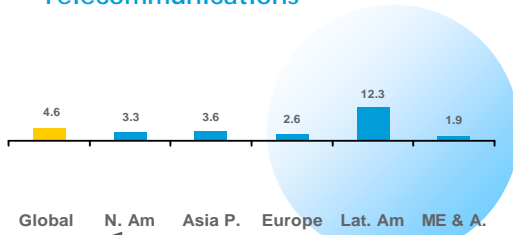
### Industry & Services



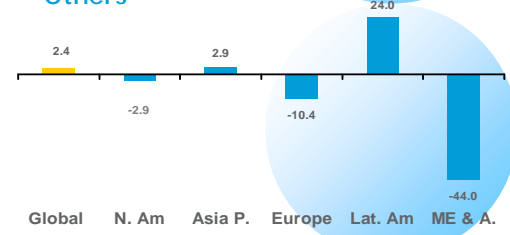
### Media



### Telecommunications



### Others





## Categories rank and % Share of Spend



## Top 20 Global Spenders





# World Trends

## Quarter

# Global Advertising Trends

## Quarter

## World Trends

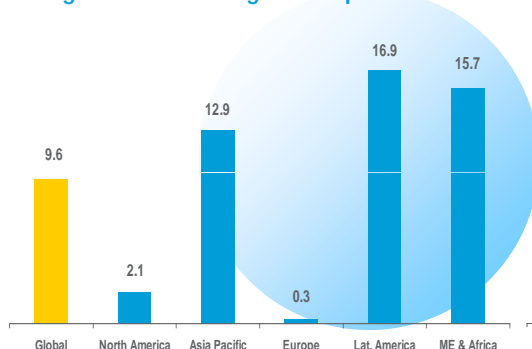
After a slight cool down in ad spending during the second quarter, third quarter ad spending picked up again—posting a 9.6 percent increase on Q3 2011. Despite the worsening crisis in the eurozone as well as decreasing consumer confidence, spending increases in the Asia Pacific (+12.9%) , Latin America (+16.9%), and the Middle East & Africa (+15.7%) returned to the double-digits during the third quarter, with Q3 posting the best year-on-year results so far in 2011. Though weighed down by ad spending cuts in Italy (-0.9%) and Spain (-9.0%), stable spending in France, Germany,

and the UK reversed the negative trend Europe saw in Q2: Europe's ad market in Q3 saw a 0.3 percent increase on Q3 2010. The Middle East, which reported a 2.2 percent growth during the second quarter as a result of the Arab Spring's impact to that market, rebounded strongly to show a 15.7 percent growth in spending versus Q3 2010. Q3 also saw the return to double-digit growth for the macro sectors: 6 of 11 macro sectors increased ad spending by more than 10 percent—a considerable increase from Q2, which saw double-digit increases in Clothing & Accessories and Healthcare only.

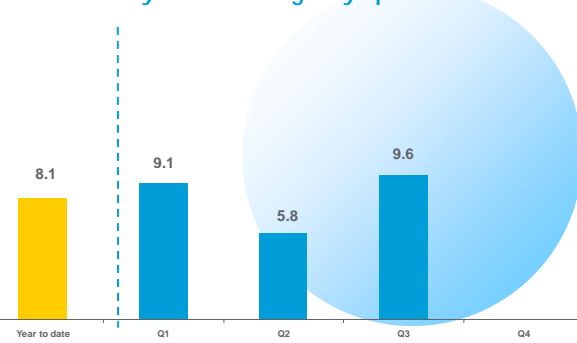
### Highlights

- Ad spend grew globally by 9.6% in Q3 2011 when compared with Q3 2010, reversing the cool down seen in Q2
- All major media types showed positive increases in spending globally in Q3, with radio topping TV in percentage growth
- Western Europe posted a slight increase in ad spend, after a slight decline was seen in Q2

Regions -- % change last quarter



Year on year % change by quarter

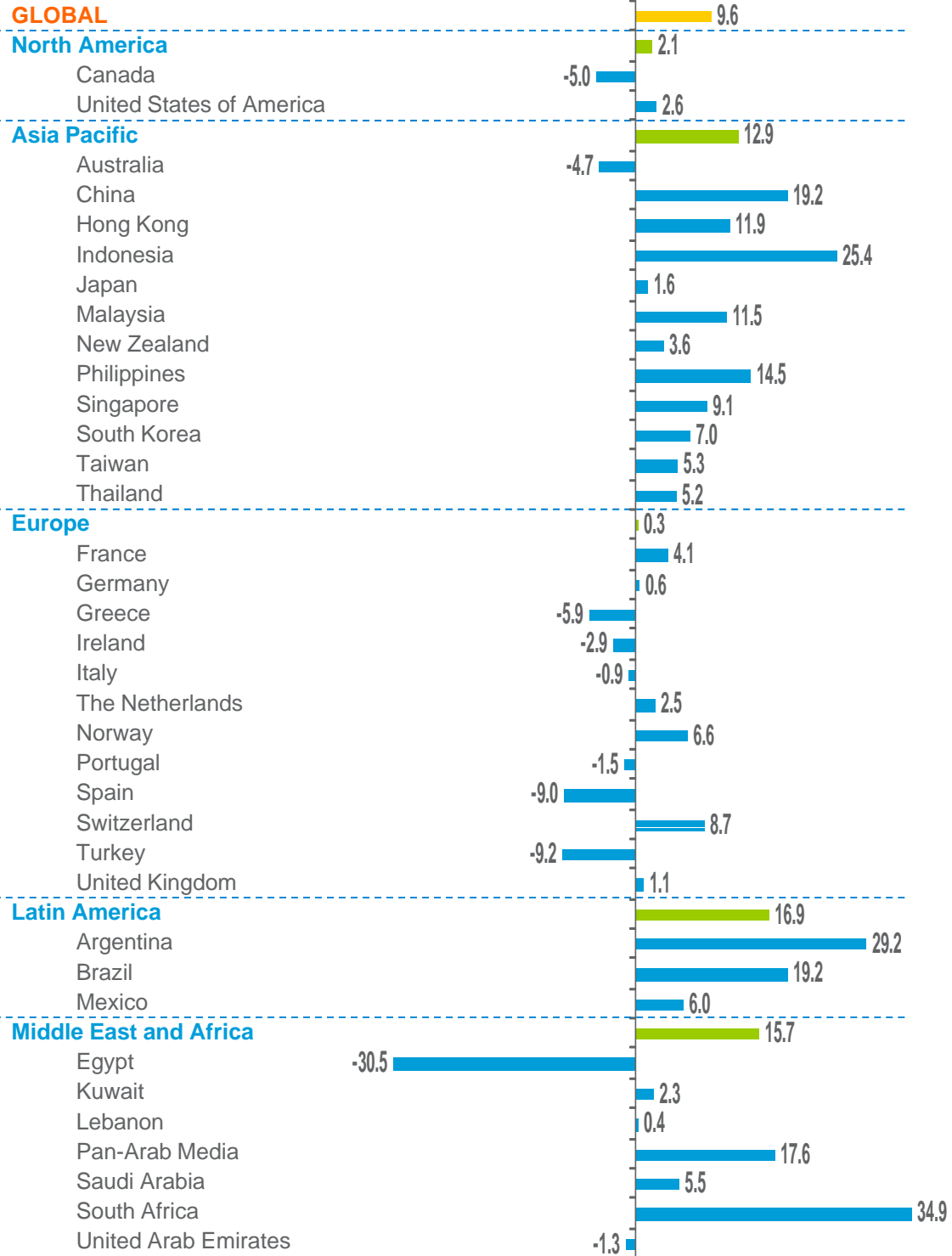


Note: media included in the global overview: Television, Newspapers, Magazines and Radio



## Global trend - overview by region and country

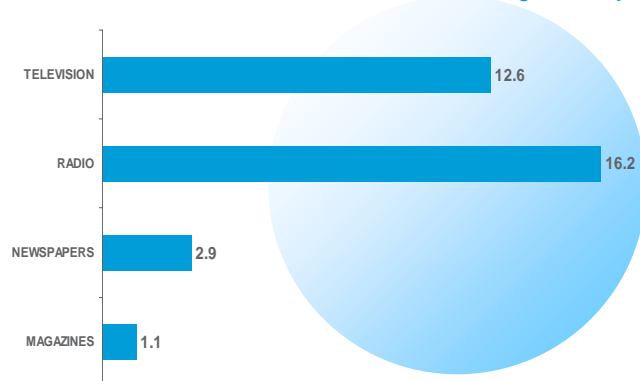
Year on Year % change



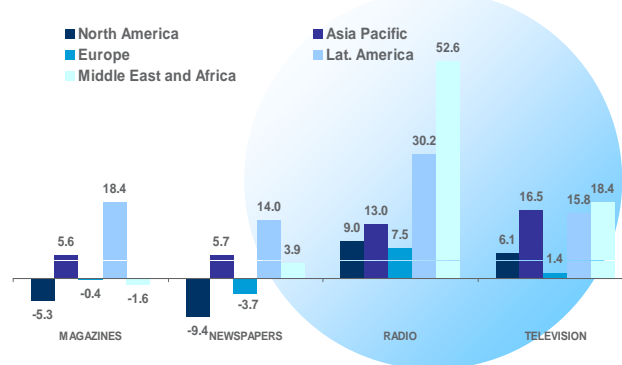
## Media Types

Radio, posting an +16.2 percent increase in ad spend when comparing Q3 2011 to Q3 2010, overtook Television in terms of percentage gains—though Television followed closely with a +12.6 percent growth globally. Newspaper ad spend, which posted a 2.9 percent growth globally in the third quarter, declined in North America (-9.4%) and Europe (-3.7%). The ad spend declines in Newspapers, however, were countered with good growth in Latin America (+14.0) and solid growth in the Asia Pacific and the Middle East & Africa (+5.7% and 3.9% respectively). Magazines, which showed positive trends in all regions during the second quarter, showed negative trends in three regions during Q3: North America (-5.3%), Europe (-0.4%), and the Middle East & Africa (-1.6%)—though globally it still posted a growth in spending of 1.1 percent.

Media -- % change last quarter



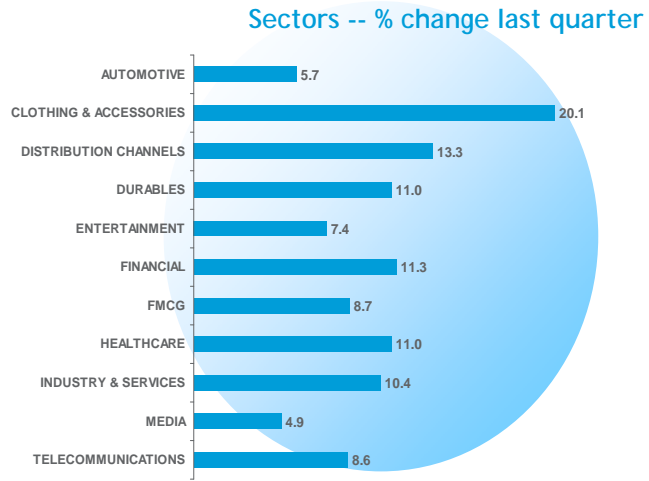
Media by Region -- % change by quarter



## Macro - Sectors

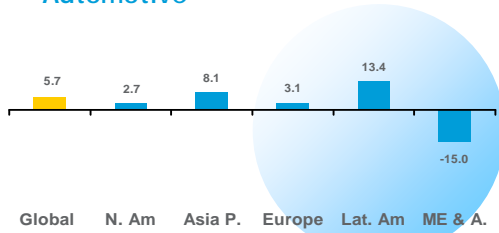
The more contained growth seen in the second quarter appeared to wash away during the third: 6 of the 11 macro sectors monitored reported double-digit increases in ad spending when comparing Q3 2011 to Q3 2010. FMCG, representing a 25.2 percent share of total ad spending, increased advertising spend by 8.7 percent in the third quarter,

though global spending was negatively impacted by declines in FMCG ad spending in North America (-2.8%) and Europe (-4.9%). Financial ad spending also increased considerably during the third quarter—by +11.3 percent over Q3 2010. Clothing & Accessories continued its increase in spending, spending 20.1 percent more in Q3 2011 than Q3 2010.

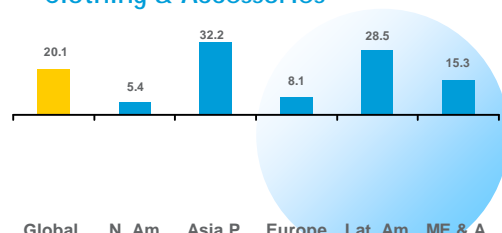


## Macro - Sectors: % change by Region

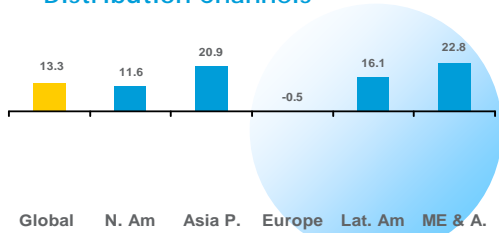
### Automotive



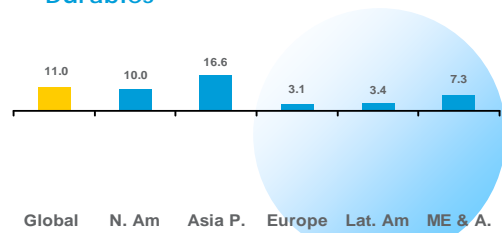
### Clothing & Accessories



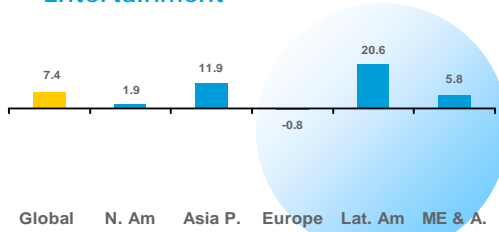
### Distribution Channels



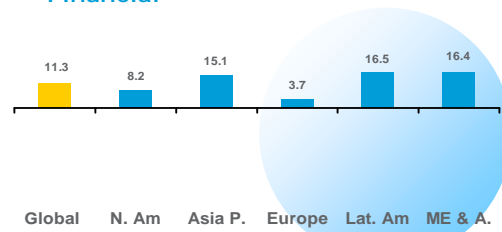
### Durables



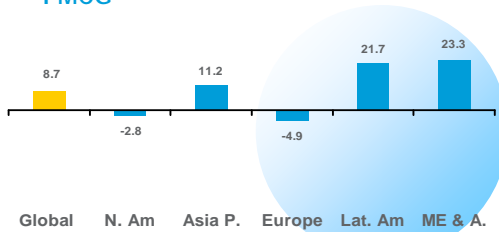
### Entertainment



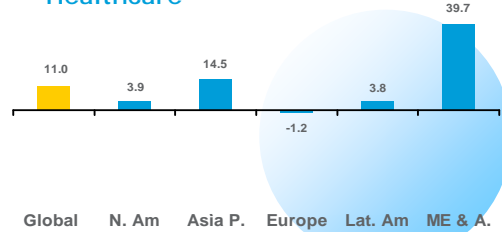
### Financial



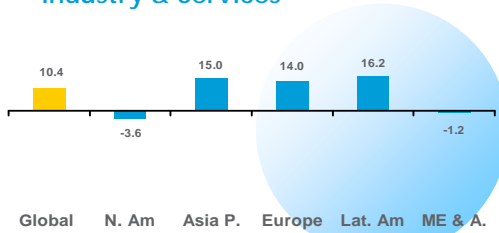
### FMCG



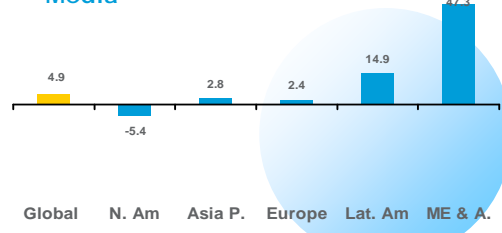
### Healthcare



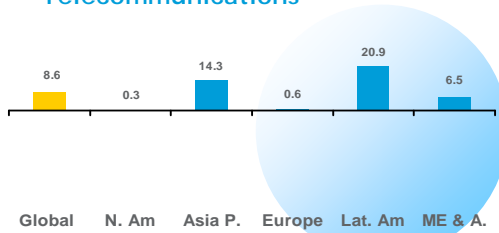
### Industry & Services



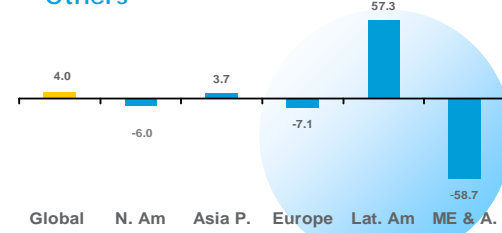
### Media



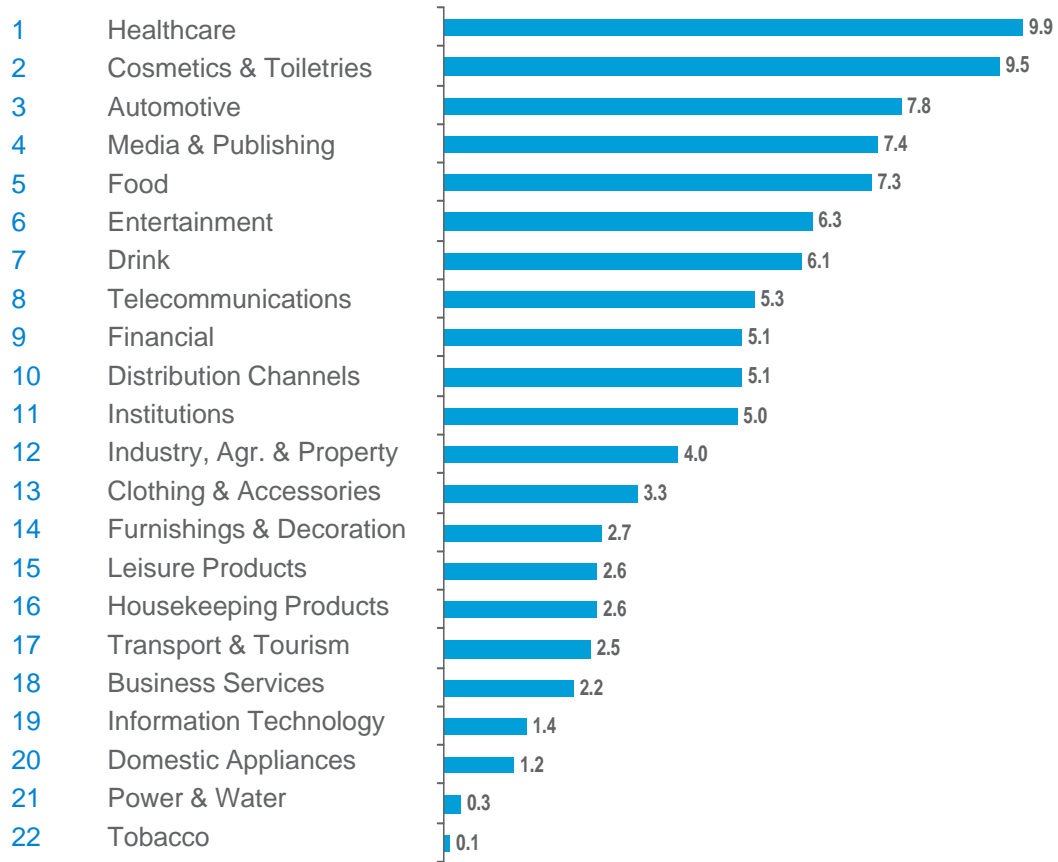
### Telecommunications



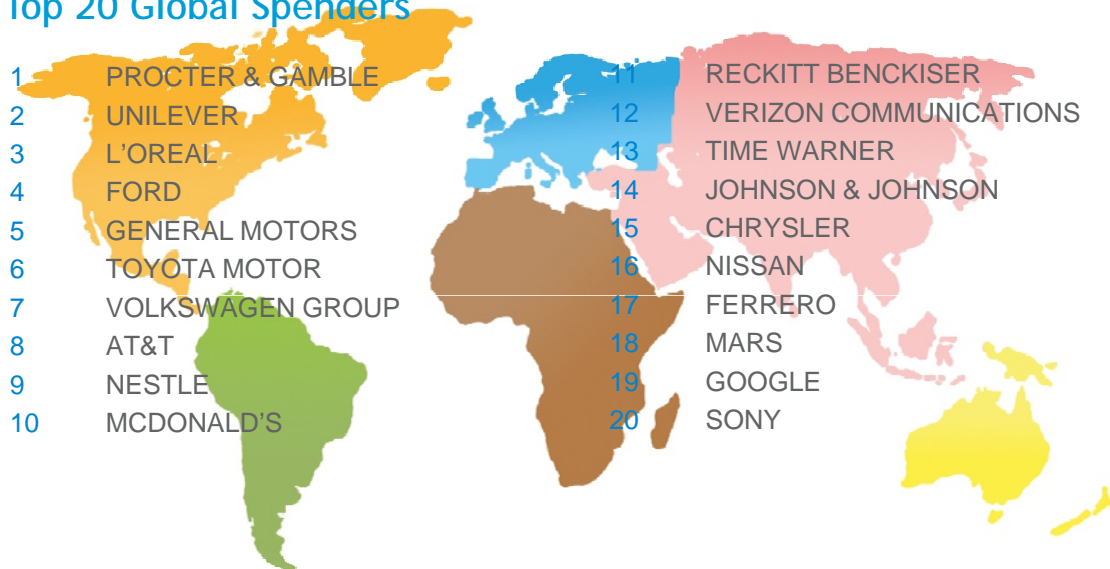
### Others



### Categories rank and % Share of Spend



### Top 20 Global Spenders







**North America**

# North America

## Region Overview

Advertising spend in North America continued to recede slightly from previous quarters, though the third quarter of 2011 still recorded a 2.1 percent increase in spending vs the third quarter of 2010. After Standard & Poor downgraded the US' AAA credit rating in August and US politicians looked on as an economic crisis grew in the eurozone, it's no surprise that advertisers proceeded cautiously with spending during the third quarter. August notably showed a small decline in spending of -0.6 percent, but spending bounced back in the month of September—recording a 4.1 percent increase over the same month in 2010. The culprit in the spending

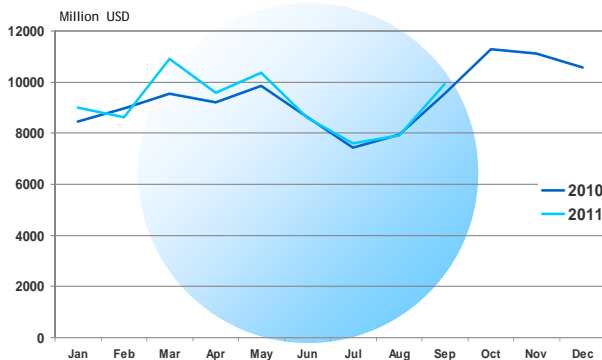


### Highlights

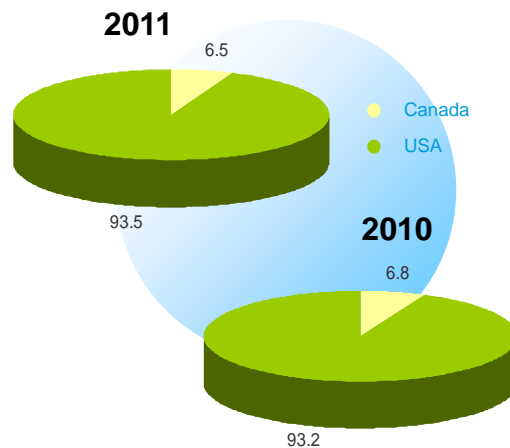
- Advertising spend continues to recede slightly with a 2.1% growth in Q3
- Both Newspapers & Magazines contribute to the decline
- 8 of 11 sectors post increases in spend, though FMCG sees a decline

slowdown was not Television, which received 6.1 percent more ad spend in the third quarter than Q3 2010, but Press—which felt a contraction in spending both in Newspapers (-9.4% vs Q3 2010) and Magazines (-5.3%). Though the decline in Newspapers' ad spend continued a trend that has been happening for the past quarters, Magazines' ad spend decline reversed the period of growth this media type experienced last quarter. 8 of 11 macro sectors posted increases in ad spend during the third quarter, though FMCG, one of the sectors commanding a large share of spend at 14.9 percent, posted a decline of -2.8 percent.

### Market -- Advertising Expenditure Trend



### Countries -- % Share of Spend -- YTD

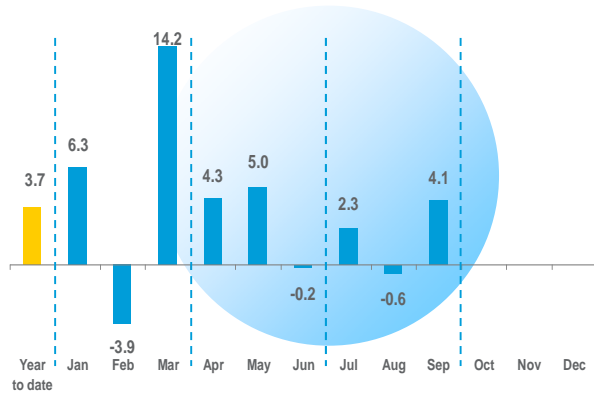


Note: media included in the region overview: Television, Newspapers, Magazines and Radio

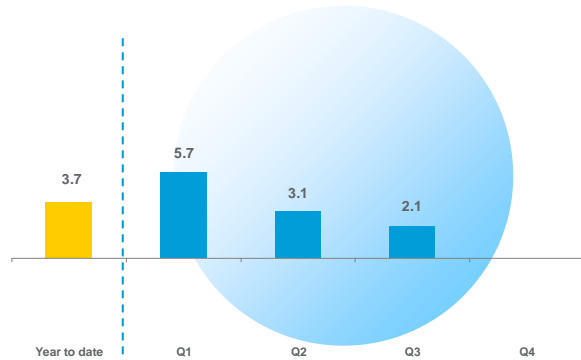


# NORTH AMERICA

Market -- Year on year % change by month

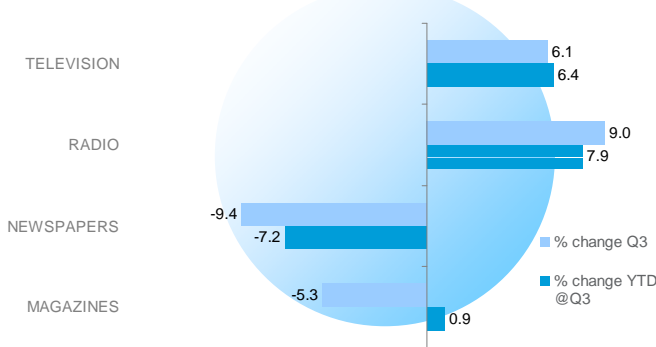


Market -- Year on year % change by quarter

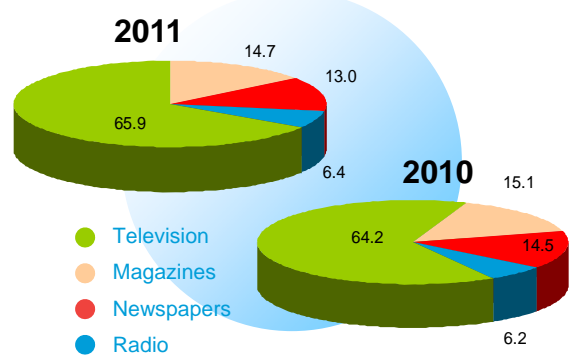


## Media Types

Media -- % change YTD and last quarter

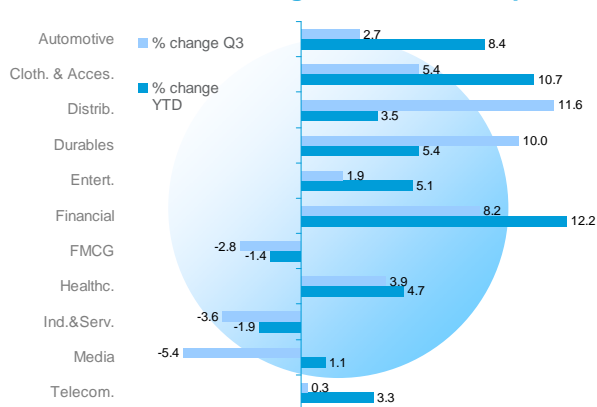


Media -- % Share of Spend -- YTD

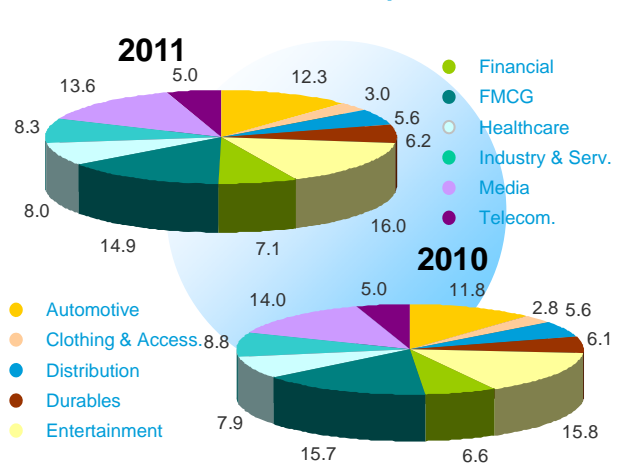


## Macro-Sectors

Sectors -- % change YTD and last quarter

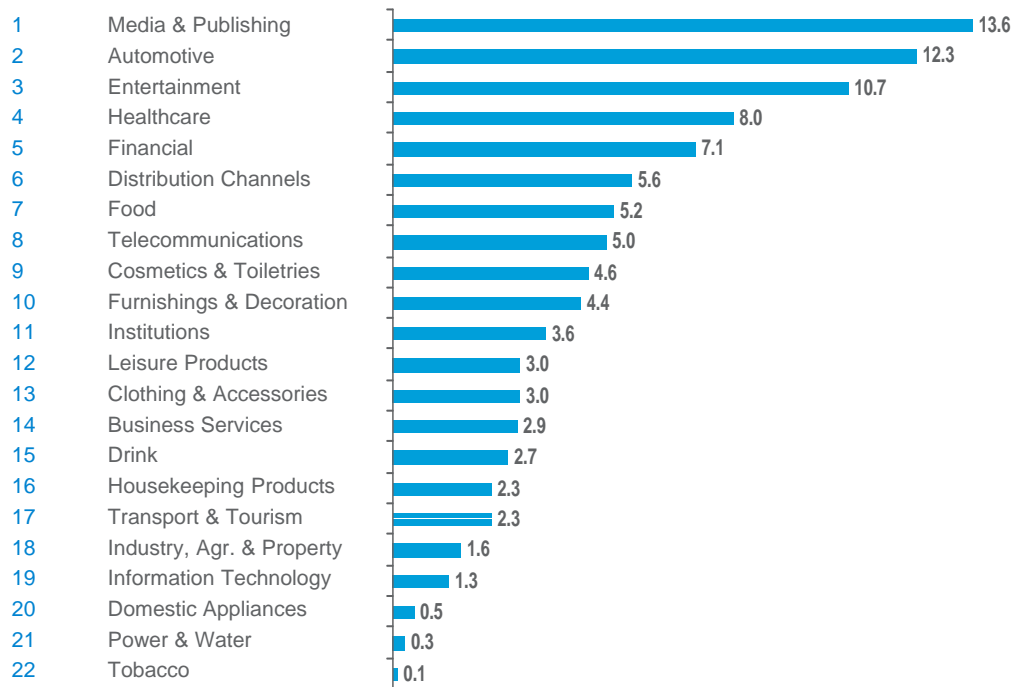


Sectors -- % Share of Spend -- YTD

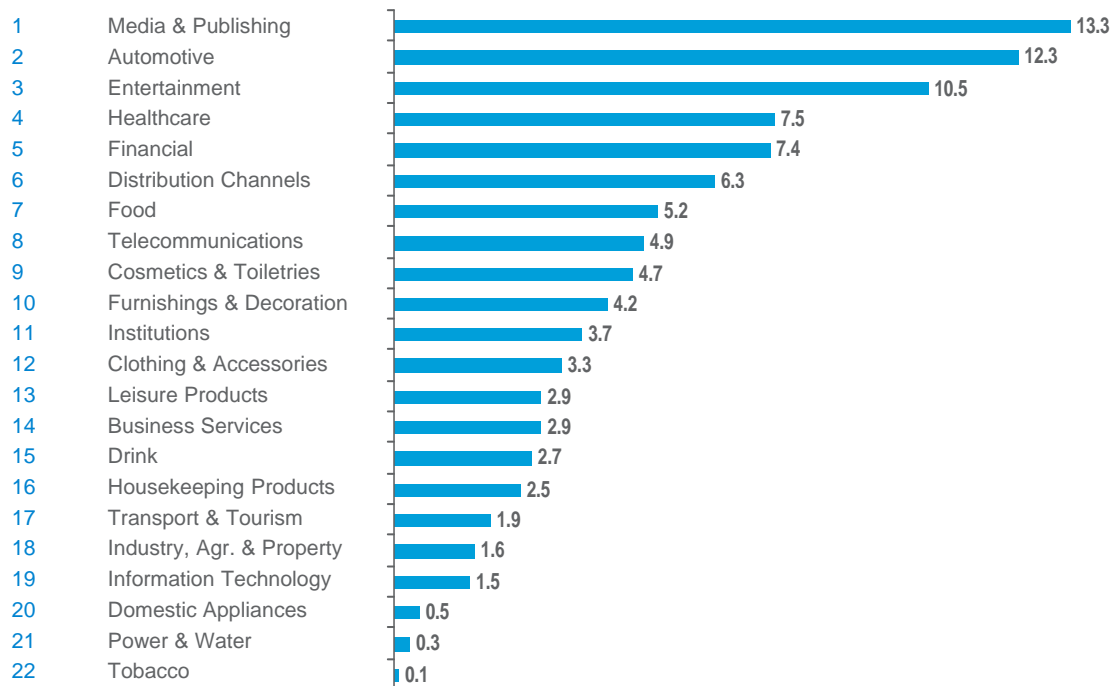




## Categories rank and % Share of Spend - Year to date



## Categories rank and % Share of Spend - Quarter



# Asia Pacific

## Region Overview

Ad spending in the Asia Pacific posted the strongest year-on-year growth yet for 2011 in the third quarter, with Q3 seeing a 12.9 percent increase in ad spending vs the same quarter in 2010. For the period January to September 2011, ad spending has increased 11.5 percent versus the corresponding period in 2010. All media types contributed to the healthy increase, with Television—the dominant media type at 66.9 percent—recording a 16.5 percent increase in ad expenditures during the third quarter. In comparison with the second



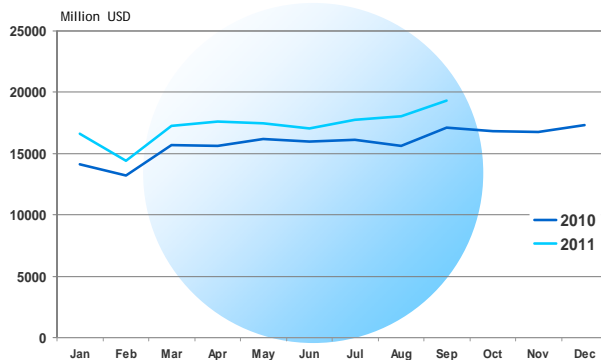
### Highlights

- Advertising spending in the Asia Pacific posts highest year-on-year growth in Q3
- All 11 macro sectors post increases in ad spend
- Japan's ad market sees an increase in spending during Q3—beginning the recovery process after the disasters experienced in Q1

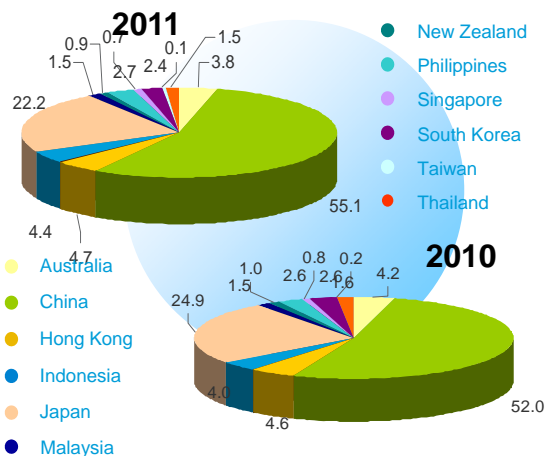
quarter, which saw 9 of 11 macro sectors spending more on advertising than Q2

2010, all 11 macro sectors reported increases in ad spending when comparing Q3 2011 with Q3 2010—with Clothing & Accessories continuing to record the highest percentage growth (32.2% vs Q3 2010). Japan's ad market, which was hammered after a massive earthquake and tsunami in March, saw increases in ad spending during the third quarter—up 1.6 percent from Q3 2010.

### Market -- Advertising Expenditure Trend



### Countries -- % Share of Spend -- YTD

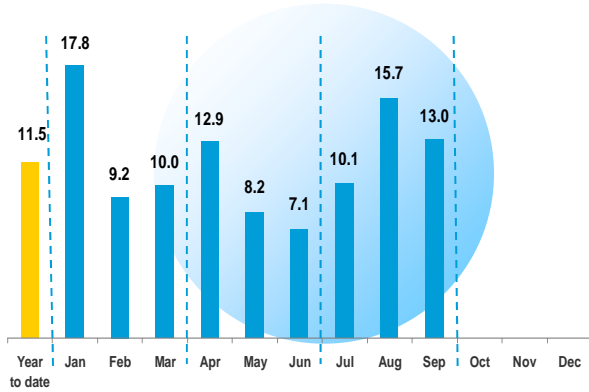


Note: media included in the region overview: Television, Newspapers, Magazines and Radio

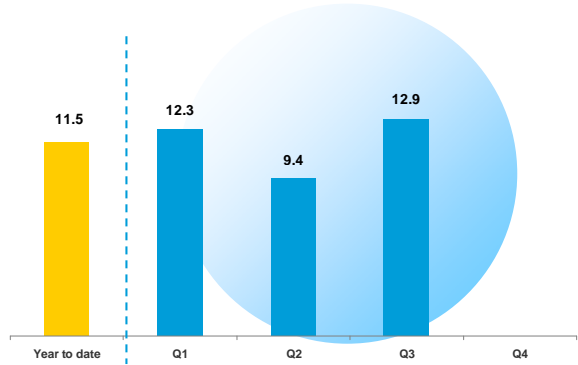


# ASIA PACIFIC

Market -- Year on year % change by month

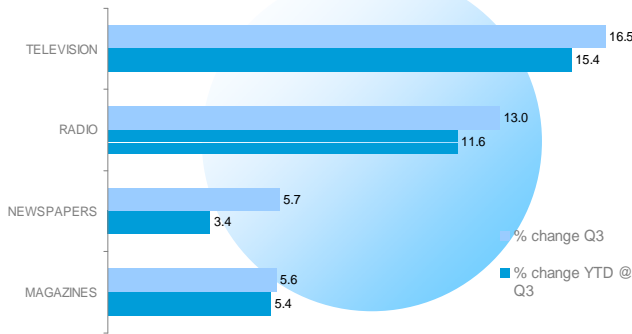


Market -- Year on year % change by quarter

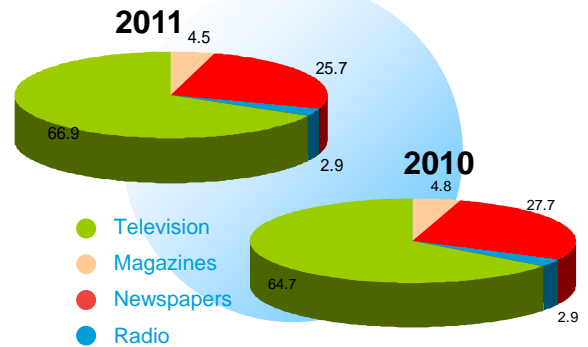


## Media Types

Media -- % change YTD and last quarter

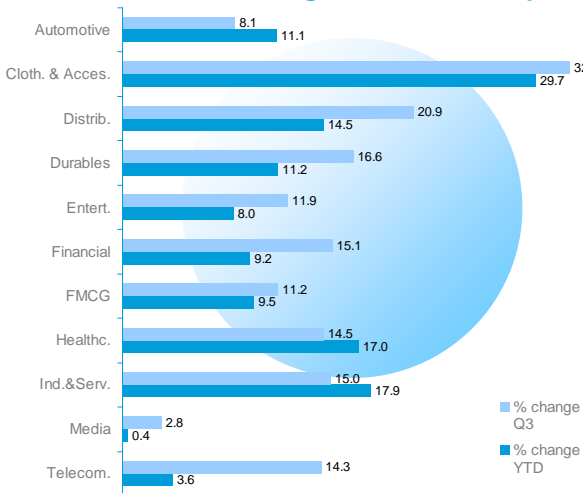


Media -- % Share of Spend -- YTD

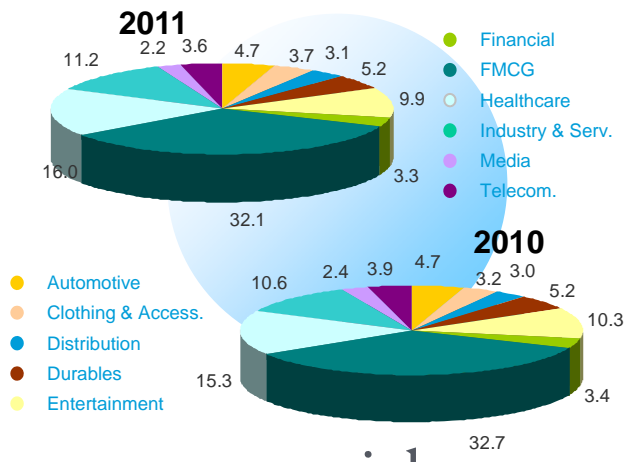


## Macro-Sectors

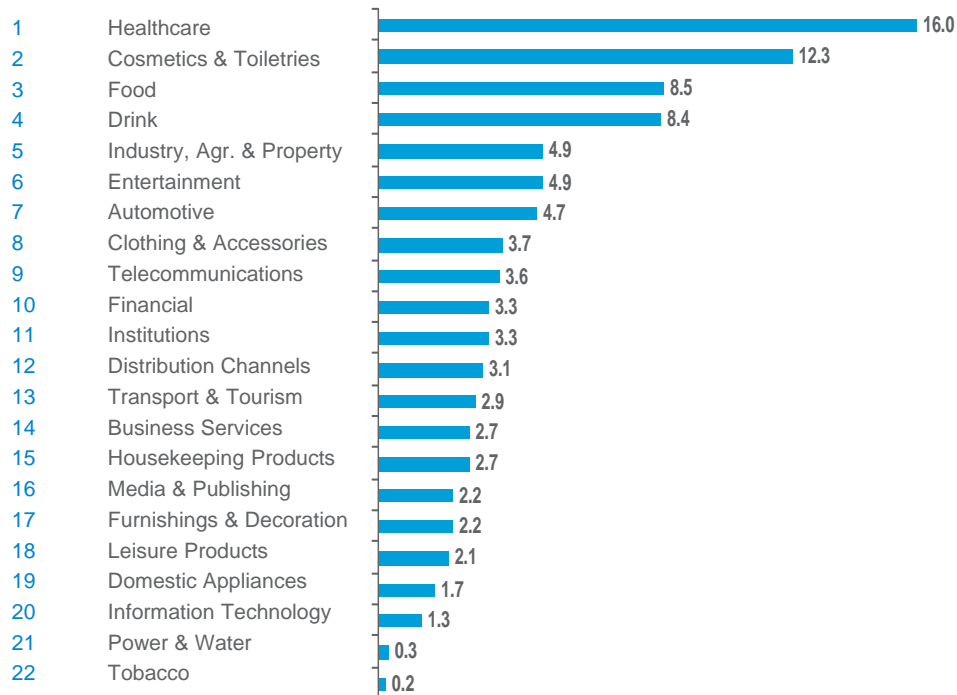
Sectors -- % change YTD and last quarter



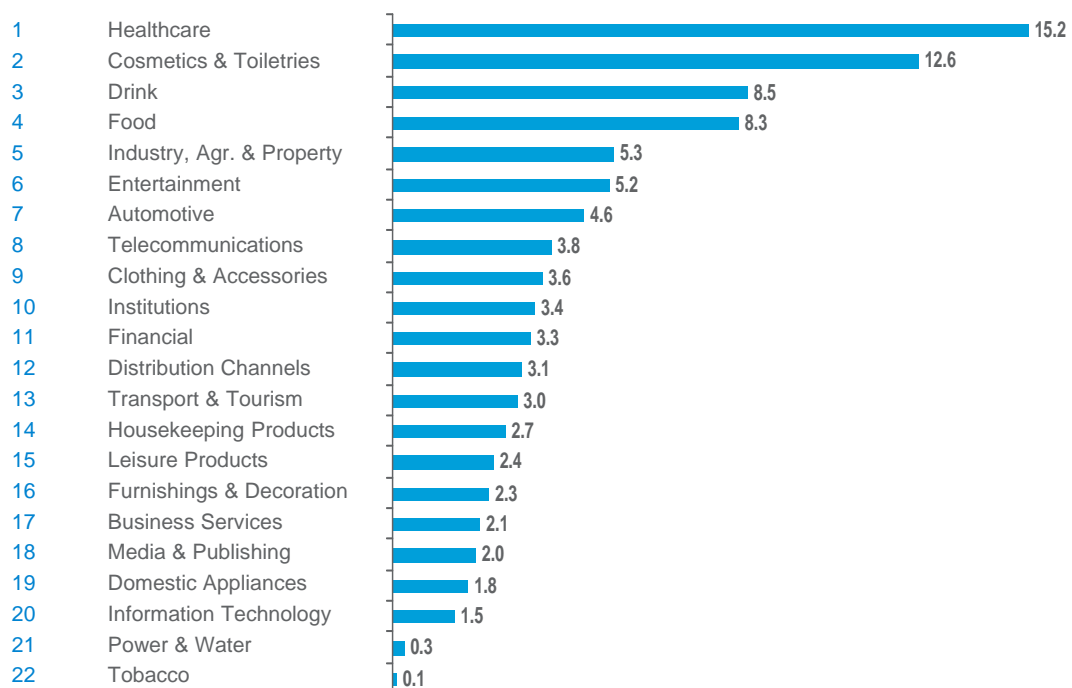
Sectors -- % Share of Spend -- YTD



## Categories rank and % Share of Spend - Year to date



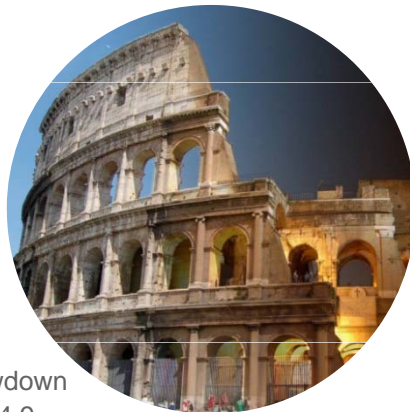
## Categories rank and % Share of Spend - Quarter



# Europe

## Region Overview

After reporting a -0.9 percent decline in Q2, the European advertising market rebounded softly in the third quarter—recording a 0.3 percent increase versus Q3 2010. This flat growth was experienced in spite of the worsening economic crisis in the eurozone, propped up by stable spending in France (+4.1%), Germany (+0.6%), and the UK (1.1%). Norway and Switzerland, though smaller markets representing a 6.1 and 5.5 percent share of spend respectively, reported the highest percentage gains in spend at 6.6 percent and 8.7 percent over Q3 2010. Conversely, larger markets Italy and Spain posted negative ad spending for the quarter, at -0.9 percent and -9.0 percent respectively. The FMCG sector was a main



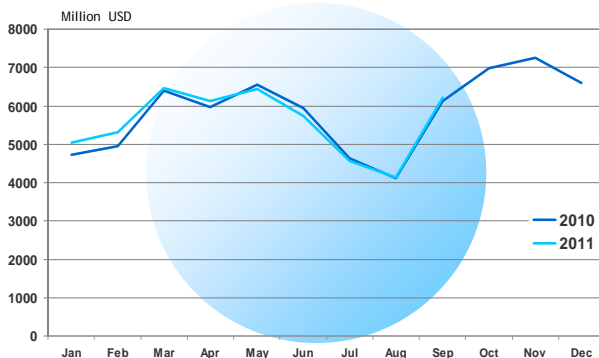
### Highlights

- European advertising closes Q3 with a slight increase of 0.3% compared with Q3 2010
- FMCG posts the largest decrease in spending at -4.9%
- Industry & Services posts the largest percentage increase in spending, at +14.0% for Q3

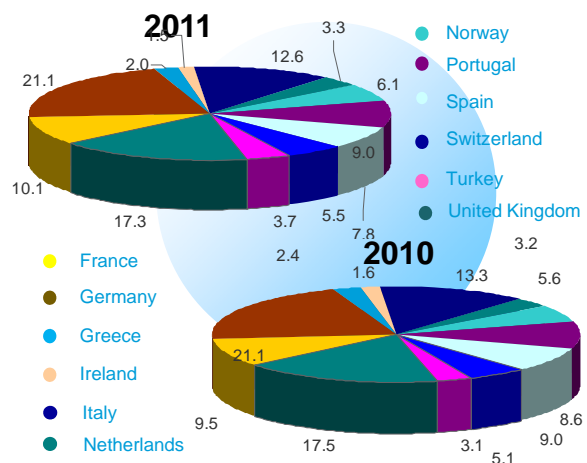
contributor to the slowdown in the market, with a -4.9

percent decline in spending during the third quarter. Representing a 25.9 percent share of spend, decreases in FMCG ad spending highly impact the market—though 7 of the 11 macro sectors monitored posted an increase in spending for Q3. Industry & Services, representing an 8.1 percent share of spend, posted the highest percentage increase in ad spend during the third quarter—at +14.0 percent.

### Market -- Advertising Expenditure Trend



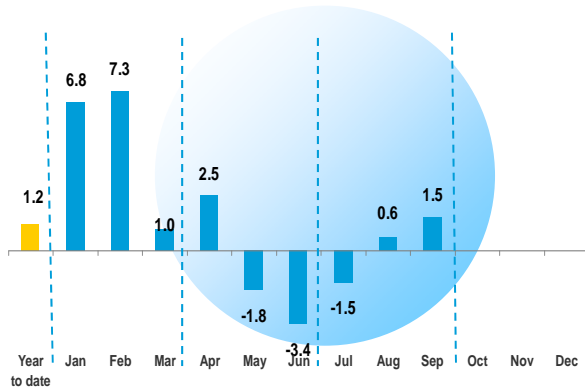
### Countries -- % Share of Spend -- YTD



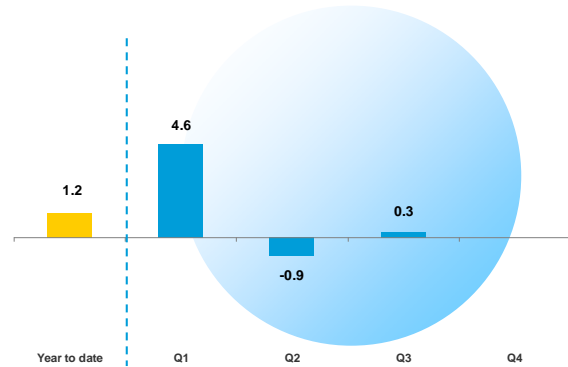
Note: media included in the region overview: Television, Newspapers, Magazines and Radio

## EUROPE

Market -- Year on year % change by month

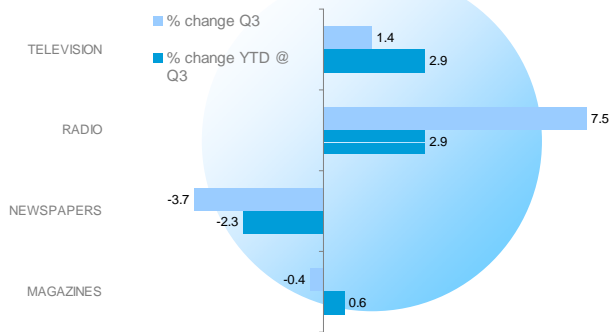


Market -- Year on year % change by quarter

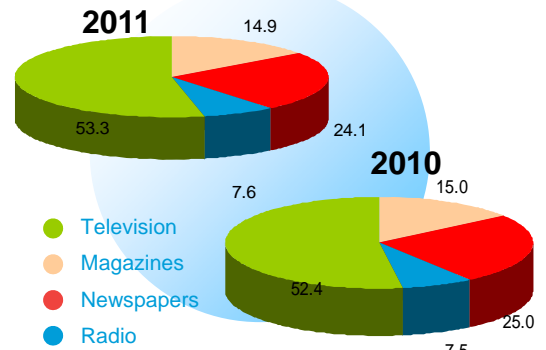


## Media Types

Media -- % change YTD

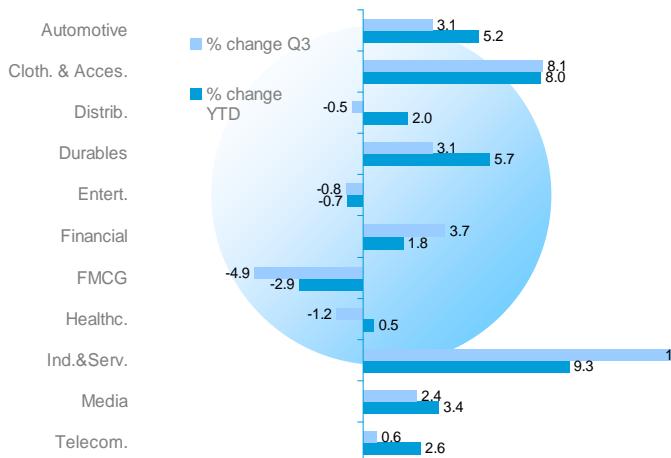


Media -- % Share of Spend -- YTD

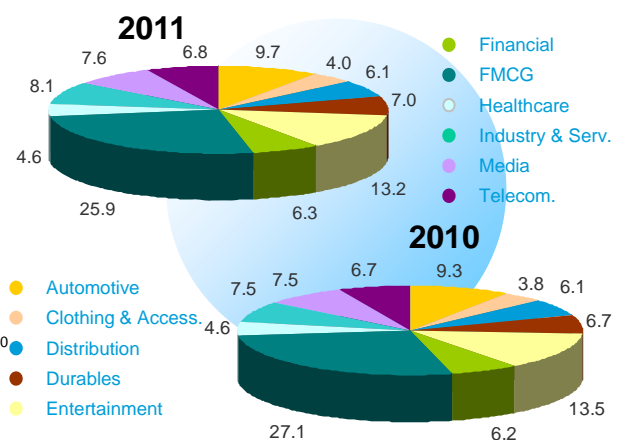


## Macro-Sectors

Sectors -- % change YTD

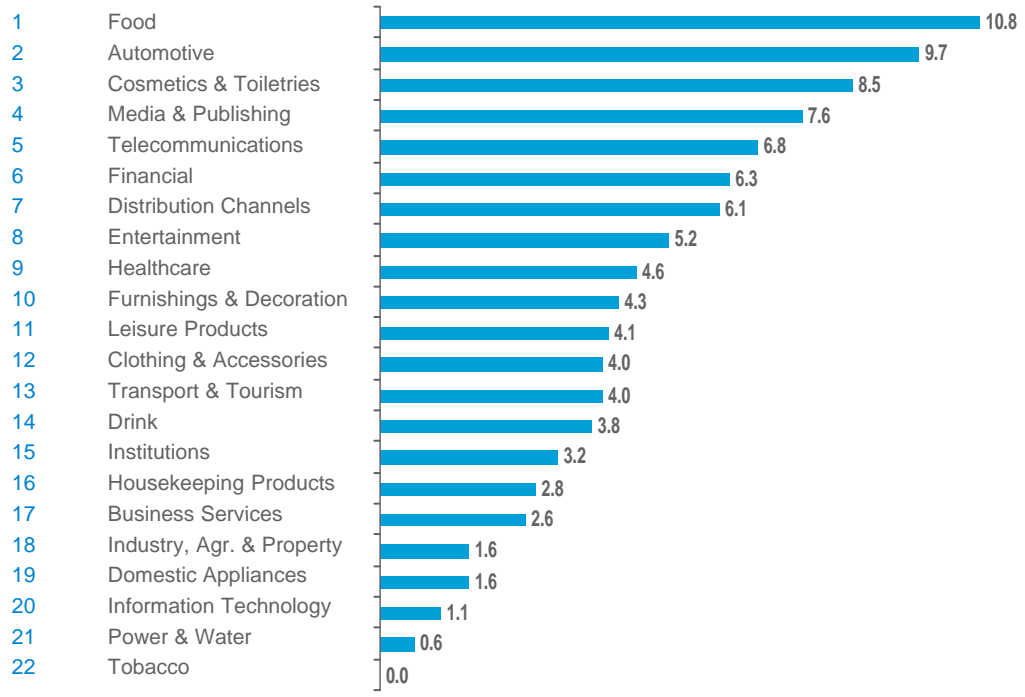


Sectors -- % Share of Spend -- YTD





### Categories rank and % Share of Spend - Year to date



### Categories rank and % Share of Spend - Quarter





# Latin America

## Region Overview

After a slight cooling trend in the second quarter (though still showing a healthy 8.2 percent increase in ad spend vs Q2 2010), the Latin American advertising market was back to double-digit growth during the third quarter—with a striking 16.9 percent increase in ad spend during Q3. Ad spending in July, August, and September was significantly higher than the year-on-year growth seen in previous months, driven by a 19.2 percent increase in ad spend in Brazil (based on the four major media types) as well as a 29.2 percent increase in Argentina. Mexico,



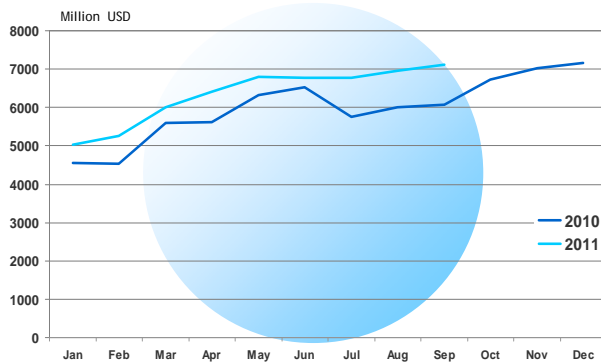
### Highlights

- Latin America's ad spending jumps 16.9% in Q3, reversing a slight cool down in Q2
- All three markets post strong increases in spend
- FMCG invests 21.7% more in ad spending during Q3

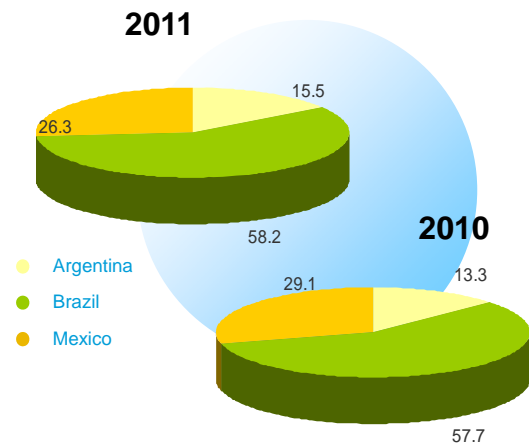
which had struggled with reduced ad budgets in the second

quarter, saw an 6.0 percent increase in spending during Q3, bringing the share of spend for this country to 15.5 percent of the three Latin American markets. All eleven macro sectors reported considerable increases in spending, led by FMCG, which posted a 21.7 percent increase (representing a 23.8% share of spend). Clothing & Accessories, though representing a smaller share of spend, posted the highest percentage increase in ad spend during Q3 at 28.5 percent.

Market -- Advertising Expenditure Trend



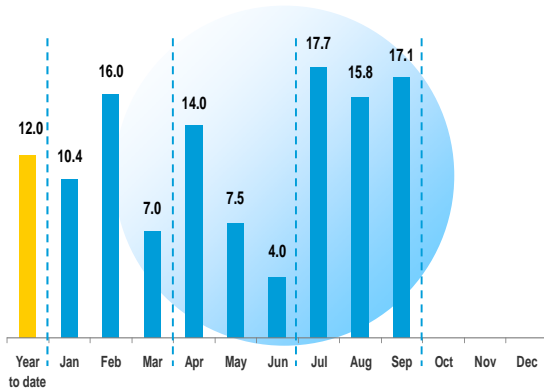
Countries -- % Share of Spend -- YTD



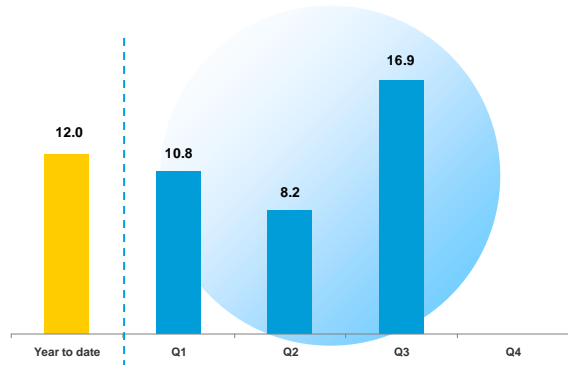
Note: media included in the region overview: Television, Newspapers, Magazines and Radio

# LATIN AMERICA

Market -- Year on year % change by month

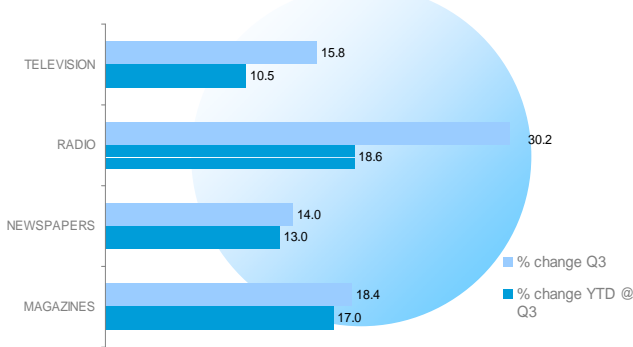


Market -- Year on year % change by quarter

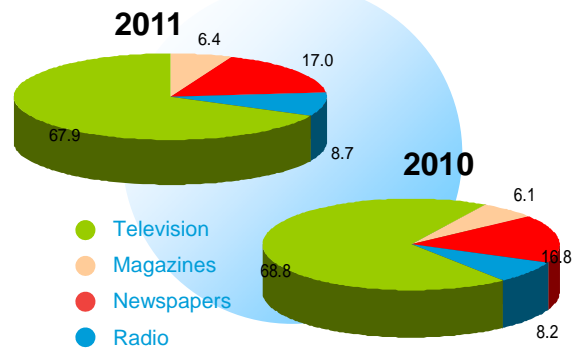


## Media Types

Media -- % change YTD and last quarter

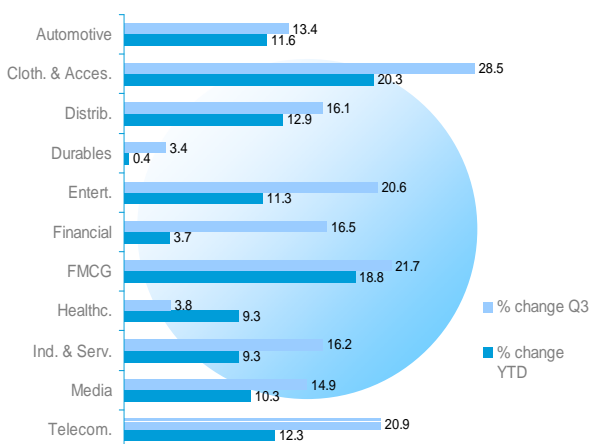


Media -- % Share of Spend -- YTD

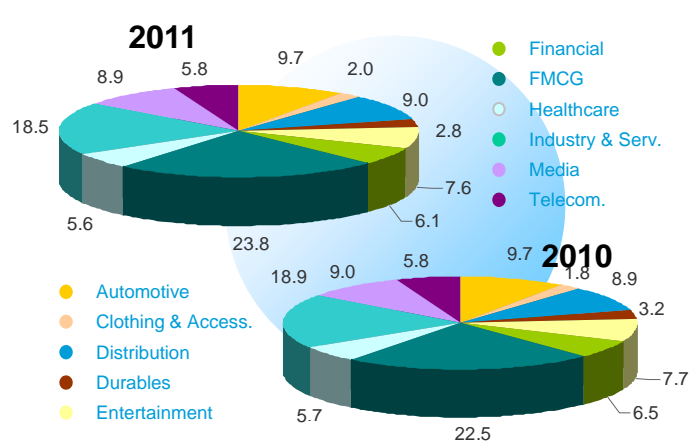


## Macro-Sectors

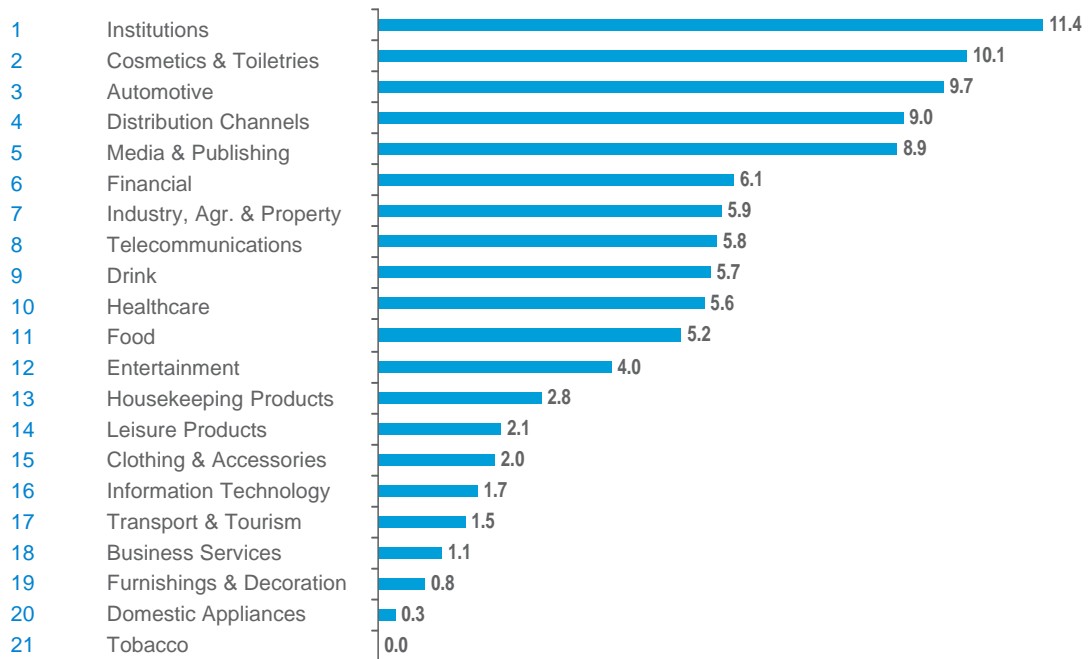
Sectors -- % change YTD and last quarter



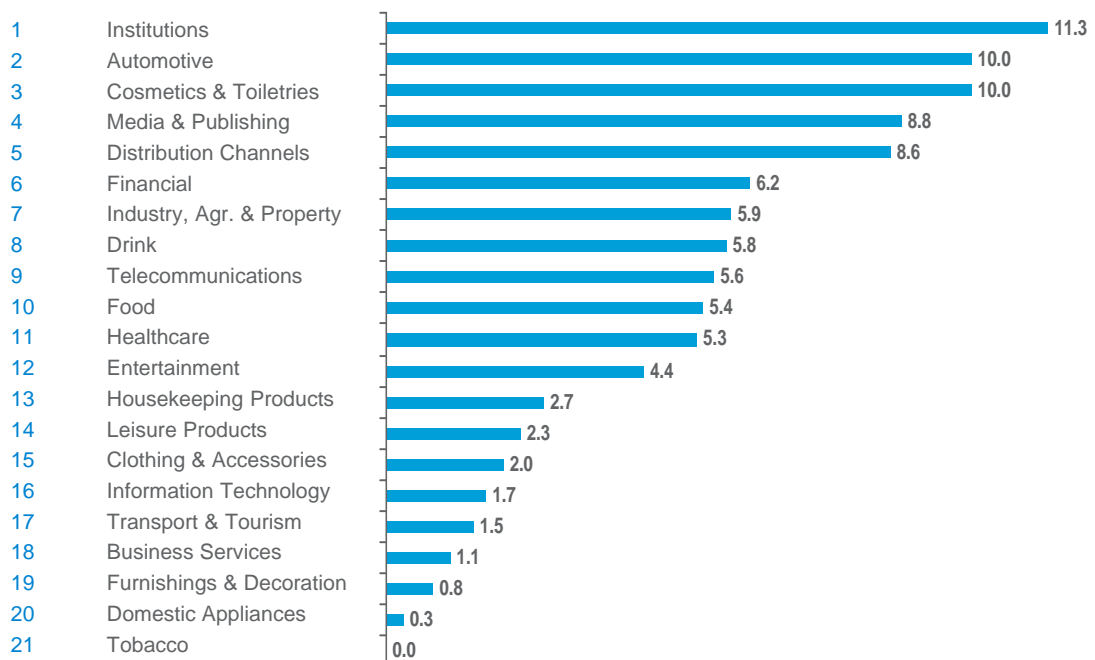
Sectors -- % Share of Spend -- YTD



### Categories rank and % Share of Spend - Year to date



### Categories rank and % Share of Spend - Quarter



# Middle East and Africa Region Overview

Heavily impacted by the Arab Spring, the advertising market in the Middle East & Africa stalled during the second quarter, but rebounded strongly in the third quarter with a 15.7 percent increase over Q3 2010. Increased advertising during the month of Ramadan helped propel August spending to a 34.0 percent increase over August 2010, though September posted a slight decline (as Ramadan fell on 10 days in September in 2010). Though the Egyptian ad market continued to suffer, the decline in spending was considerably less



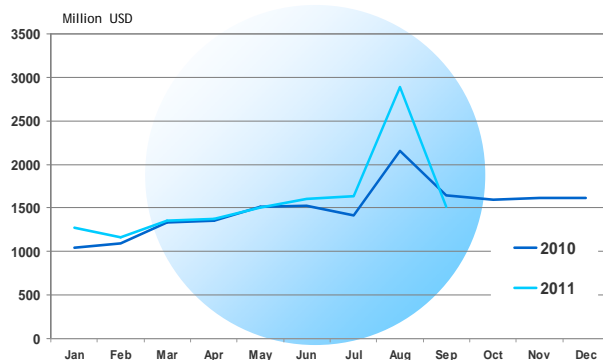
## Highlights

- Egyptian ad market still on the decline—but at a lower rate than experienced during the first half of 2011
- Ad market ends first three quarters with a 9.5% increase -largely driven by South Africa
- Automotive sector reduces ad spending by -15.0% in Q3

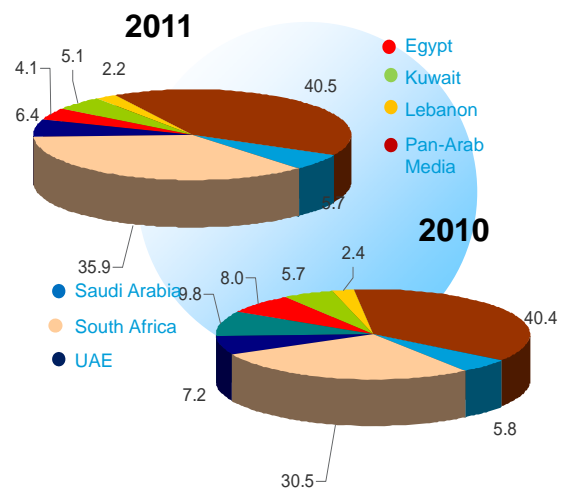
than experienced in Q1 and Q2—recording a -30.5 percent decline in

spending rather than the 51 percent decrease seen in the first half of the year. Pan-Arab Media, which experienced flat growth in the second quarter, was back in black during Q3—at a 17.6 percent increase. The South African ad market still remained by far the best-performing market in the Middle East & Africa region, with a 34.9 percent increase in ad spending in the third quarter.

## Market -- Advertising Expenditure Trend



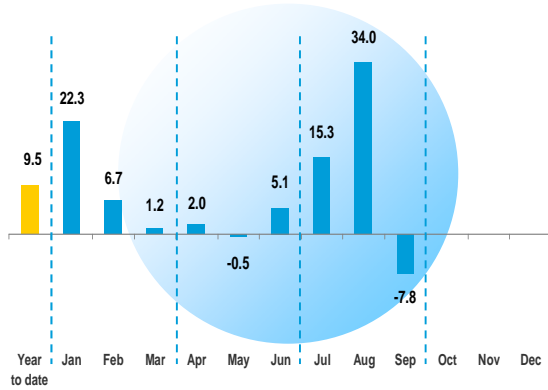
## Countries -- % Share of Spend -- YTD



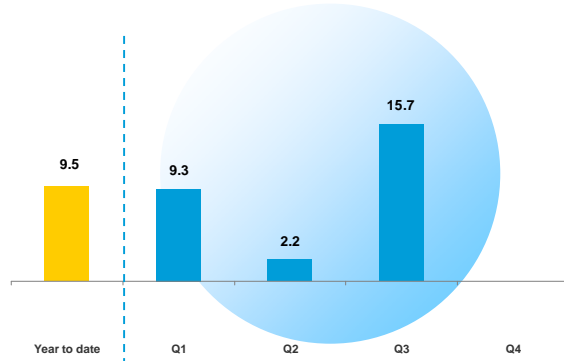
Note: media included in the region overview: Television, Newspapers, Magazines and Radio

## MIDDLE EAST AND AFRICA

Market -- Year on year % change by month

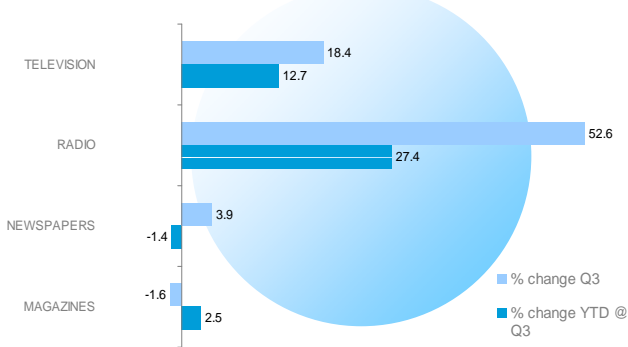


Market -- Year on year % change by quarter

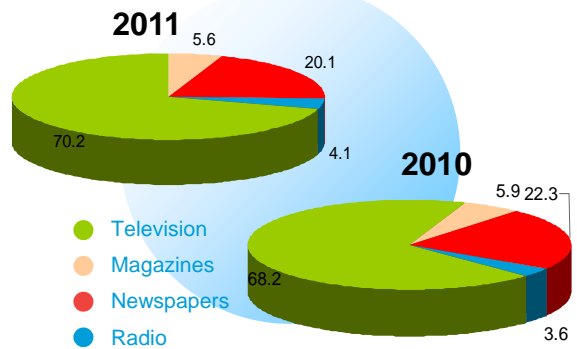


## Media Types

Media -- % change YTD and last quarter

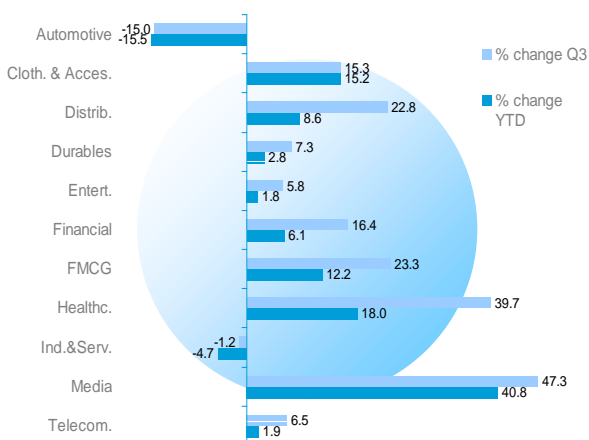


Media -- % Share of Spend -- YTD

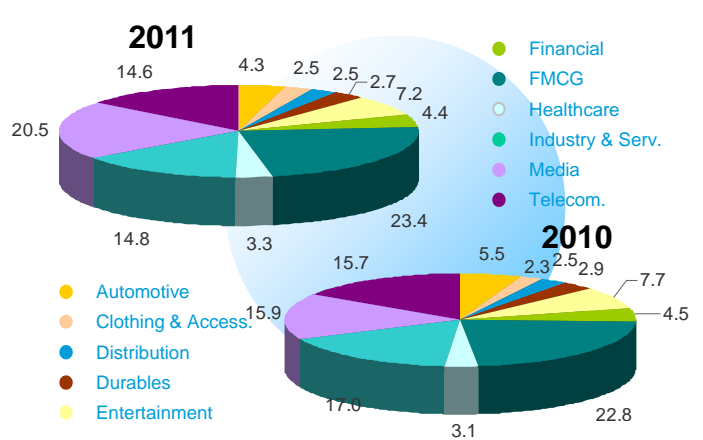


## Macro-Sectors

Sectors -- % change YTD and last quarter

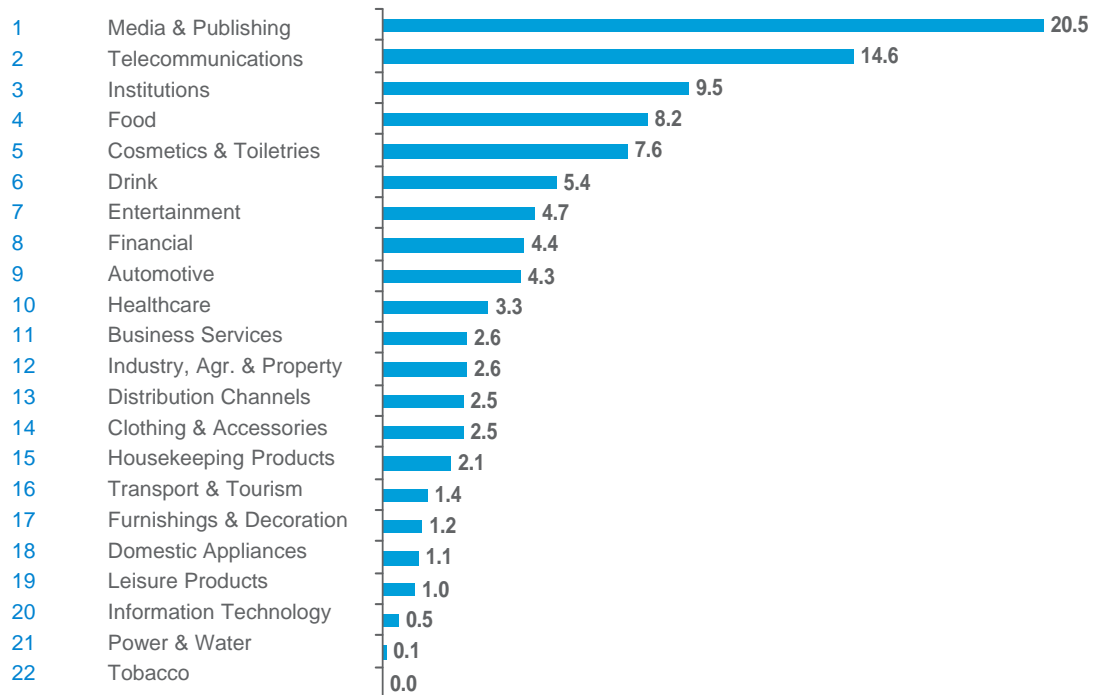


Sectors -- % Share of Spend -- YTD

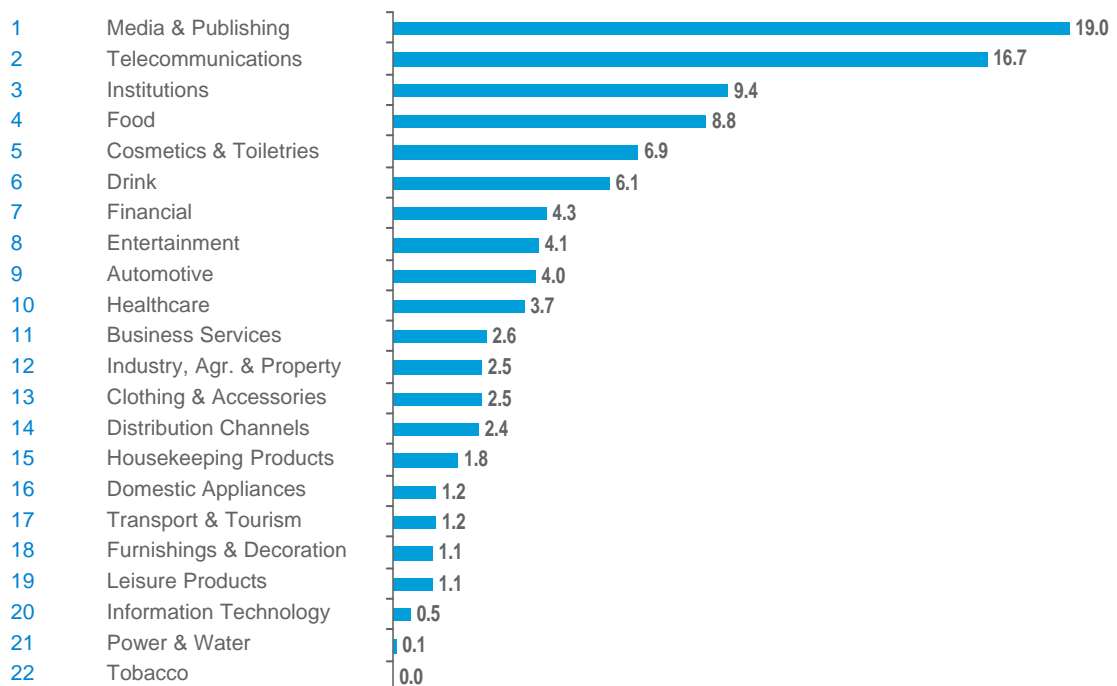


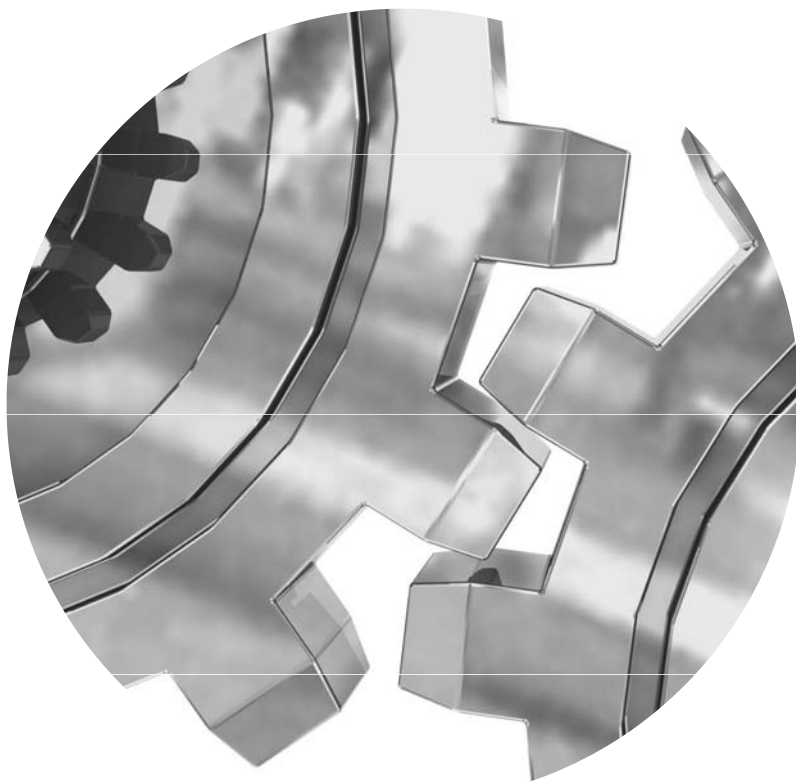


## Categories rank and % Share of Spend - Year to date



## Categories rank and % Share of Spend - Quarter





## 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, 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

\* *in association with Media Focus*



# 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 August 30 and September 16, 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.



# Media coverage overview

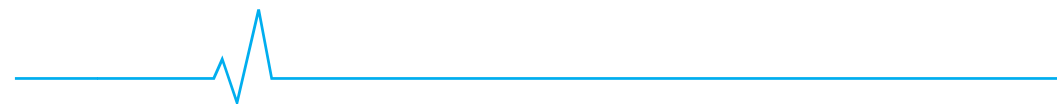
This table presents an overview of the media types covered in each territory.

	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>							
France							
Germany							
Greece							
Ireland							
Italy							
Netherlands							
Norway							
Portugal							
Spain							
Switzerland							
Turkey							
UK							

# Media coverage overview

This table presents an overview of the media types covered in each territory.

	TV	Newsp.	Magaz.	Radio	Outdoor	Cinema	Internet
Latin America							
Argentina							
Brazil							
Mexico							
Middle East and Africa							
Egypt							
Kuwait							
Lebanon							
Pan-Arab							
Saudi Arabia							
South Africa							
UAE							



## Notes to accompany data

Please refer to the following notes to this quarter's data while reading the report.

- **Argentina:** due to local coding methodology for Retail, it is not possible to attribute the local spend to the global Distribution Channels category. The trend for this sector is therefore not reported separately.
- **China:** spend information for Radio and Internet is not available prior to 2008 therefore the trends for the previous years are not reported.
- **Egypt:** Outdoor information is excluded from this review as it was not complete at time of publication.
- **France:** spend information for Internet is not available prior to 2008 therefore the trends for the previous years are not reported. Figures are provided at rate card prices, but Nielsen Global AdView estimated weighting factors are applied to ensure trends are more representative of the market. Internet is excluded as a major modification in Internet methodology took place mid-2010, making 2011 data incomparable.
- **Germany:** figures are provided at rate card prices, but Nielsen Global AdView estimated weighting factors are applied to ensure trends are more representative of the market.
- **Greece:** figures are provided at rate card prices, but Nielsen Global AdView estimated weighting factors are applied to ensure trends are more representative of the market.
- **Ireland:** Press figures for 2011 and Television figures for 2010 and 2011 are estimated net at source; Nielsen Global AdView estimated weighting factors are applied to Press figures for 2010.
- **Italy:** Outdoor's trend 2009 versus 2008 is affected by an increase in coverage in 2009.
- **Kuwait:** Outdoor information is excluded from this review as it was not complete at time of publication.
- **Malaysia:** overall growth is in part due to increased coverage for Television.
- **Lebanon:** due to the presence of very high discounts from Television media owners compared to other markets in the Middle East, an average weighting factor is applied to Television ad spend.

## Notes to accompany data

Please refer to the following notes to this quarter's data while reading the report.

- **The Netherlands:** figures are provided at rate card prices, but Nielsen Global AdView estimated weighting factors are applied to ensure trends are more representative of the market. Internet is excluded as a major modification in Internet methodology took place mid-2011, making 2010 data incomparable.
- **Saudi Arabia:** the sharp decrease in Radio is in part due to the limited number of monitored channels.
- **Singapore:** spend information for Internet is not available prior to 2008 therefore the trends for the previous years are not reported.
- **South Africa:** the share of spend and the trend of the macro-sector Media are influenced by the high incidence of in-house advertising.
- **Spain:** data reflects apples-to-apples comparisons to the prior year in terms of coverage and methodology, to give a more accurate representation of the trends. Outdoor information was excluded from this report as it was not complete at the time of publication.
- **Thailand:** spend information for Internet is not available prior to 2008 therefore the trends for the previous years are not reported.
- **Turkey:** figures are provided at rate card prices, but Nielsen Global AdView estimated weighting factors are applied to ensure trends are more representative of the market. Overall growth in Q1 is in part due to TV rate card changes.
- **UK:** due to a break in trend caused by a changing methodology, Internet data is excluded from the 2008 vs 2007 comparison. Internet has been excluded for 2011 as a major methodology change has made 2011 incomparable to 2010.
- **USA:** data reflects apples-to-apples comparisons to the prior year in terms of coverage and methodology, to give a more accurate representation of the trends. Internet and Outdoor information was excluded from this report as it was not complete at the time of publication.



About Nielsen Global AdView



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## Contact

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

### 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.

### 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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# SNEAK PREVIEW

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# Australia

## Country Overview

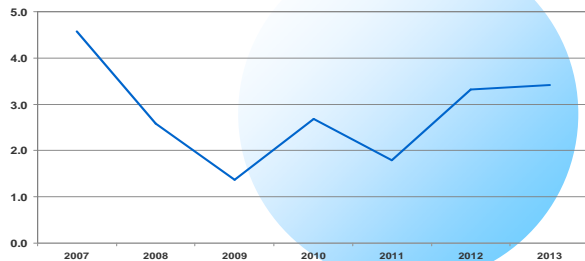
### Quick Facts

- **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
- **Nielsen Consumer Confidence Index**  
(Q3 2011): **97**  
Change Q3 2011 vs Q2 2011: -6

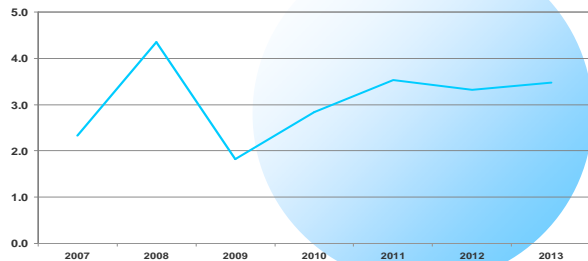


### Macro Economic trends

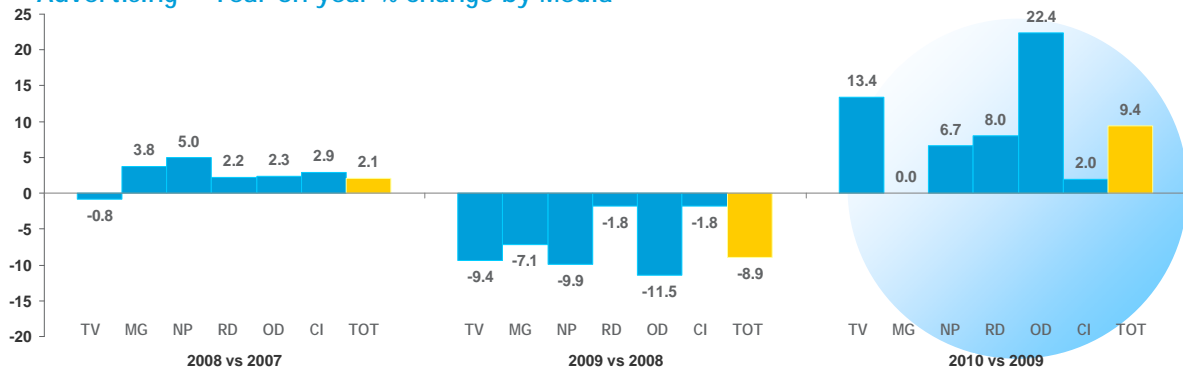
GDP constant prices - year on year % changes



Consumer prices - year on year % changes



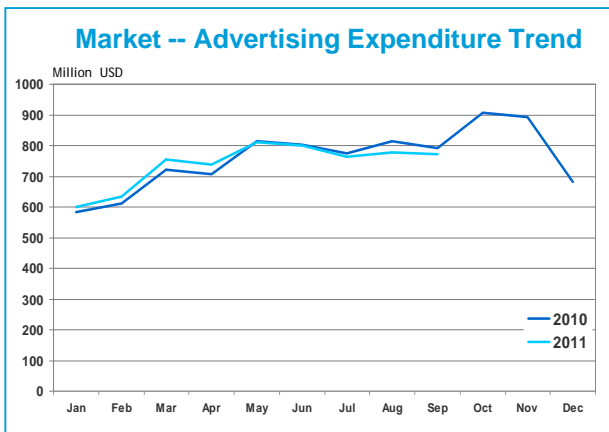
Advertising -- Year on year % change by Media



## Australia

The Australian economy grew 1 percent over the third quarter, with a growth of 2.5 percent for the year to September 2011. The mining and construction sectors were the key contributors to economic growth for the third quarter. A slight uplift in Retail sales was recorded for the quarter, although there is a continuing trend for consumers to shy away from traditional retail outlets as Online shopping continues to grow—both locally and from stores abroad (with the high Australian dollar). In light of uncertainty on

global markets and advertisers adopting a more cautious approach, the Australian media market experienced a decline in spend of -2.8 percent for the third quarter of 2011. Limiting some of this decline were solid increases for Distribution Channels (+10.4%),



Telecommunications (+8.4%), Healthcare (+7.6%), Clothing & Accessories (+6.7%), and Durables (+6.4%). Television, which commands a 40.2 percent share of spend, showed a slight decline in ad spending during the third quarter—at -2.2 percent. Newspapers, possessing a 31.1 percent share of spend year-to-date, posted a more significant decline in spending at -7.6 percent in the third quarter. Newly covered in the Pulse report this quarter, Australian Internet finished the third quarter with double-digit increases in spend from last year—at 24.4 percent in Q3 2011 vs Q3 2010. The top 20 advertisers ranking represents a broad cross-section of sectors: Retail, Finance, FMCG (4), Auto, Government, Telecommunications (2), Entertainment and Travel (1).

## Highlights

- Australia's economy grew 1% in Q3
- Ad market declines, however, by -2.8% in Q3
- FMCG takes a major hit in ad spending, with a decrease of -17.4% seen for Q3

## Methodology

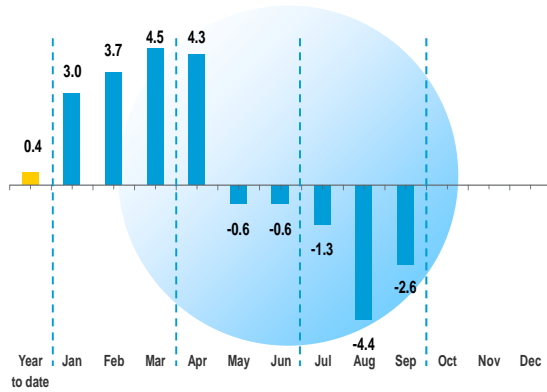
- **Media covered:** Television, Newspapers, Magazines, Radio, Outdoor, Cinema, Internet
- **Figures:** estimated net at source
- **Discounts** are assigned by advertiser and/or by agency across all media types and revised annually

## Notes

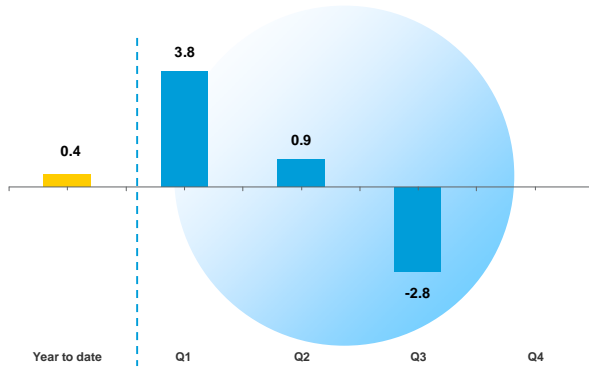
Internet is now included amongst the monitored media types

## Australia

Market -- Year on year % change by month

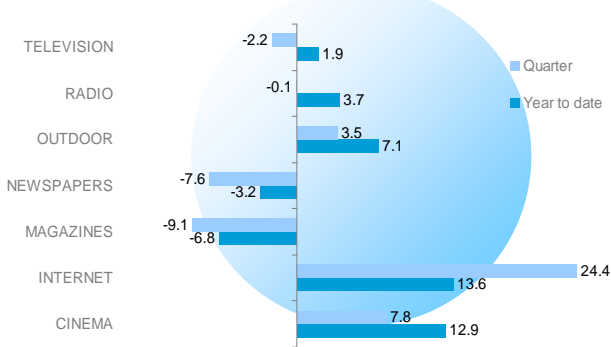


Market -- Year on year % change by quarter

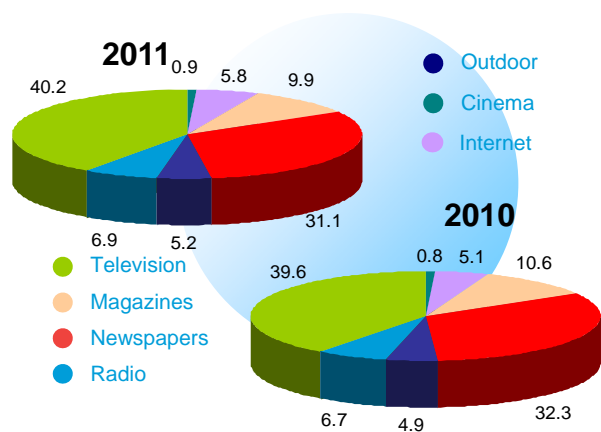


## Media Types

Media -- % change YTD and last quarter

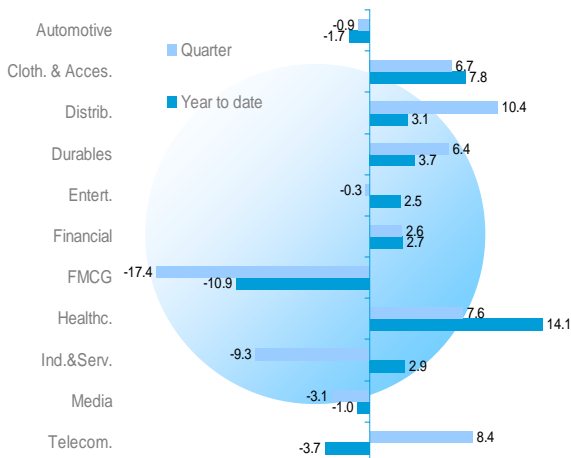


Media -- % Share of Spend -- YTD

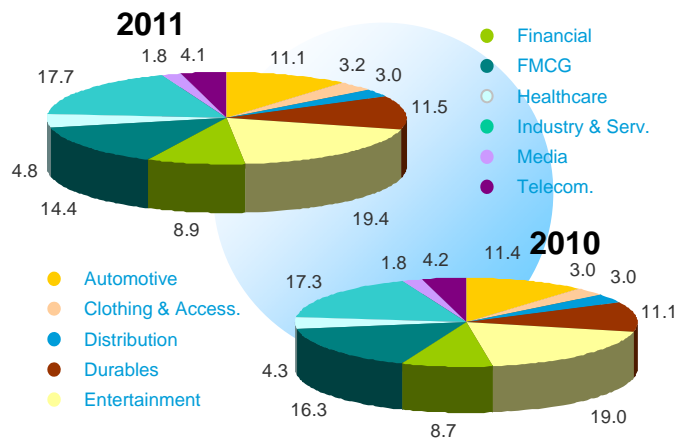


## Macro-Sectors

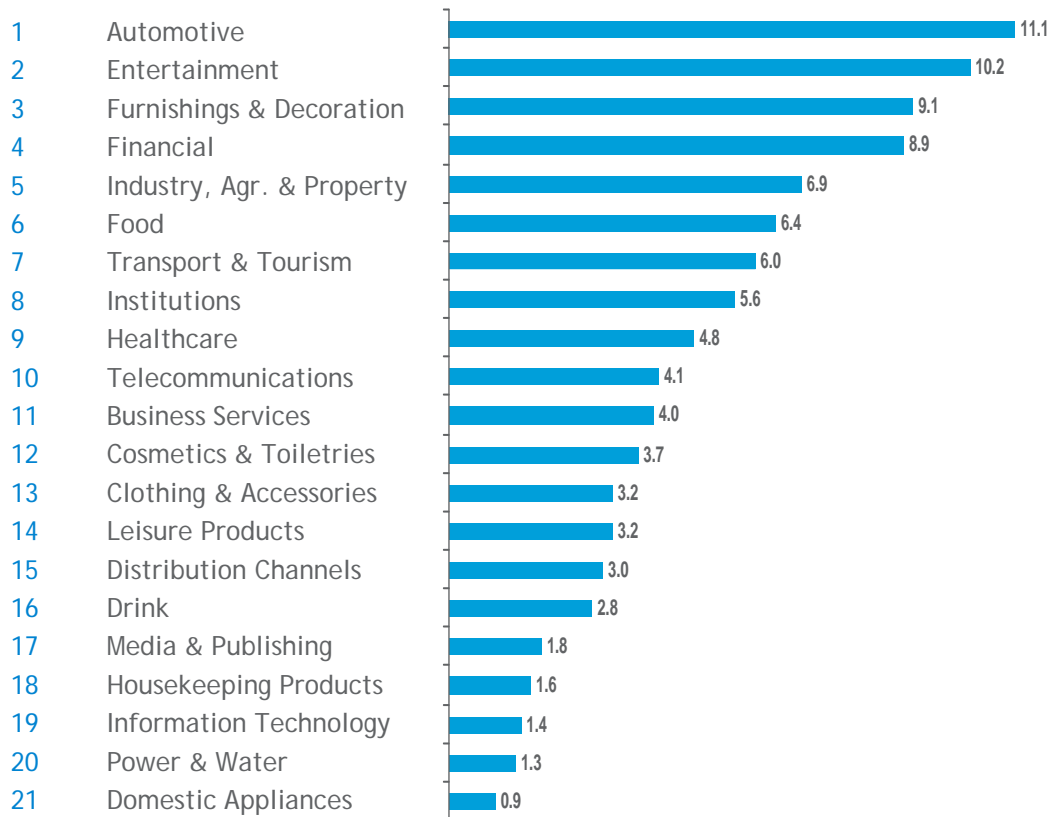
Sectors -- % change YTD and last quarter



Sectors -- % Share of Spend -- YTD



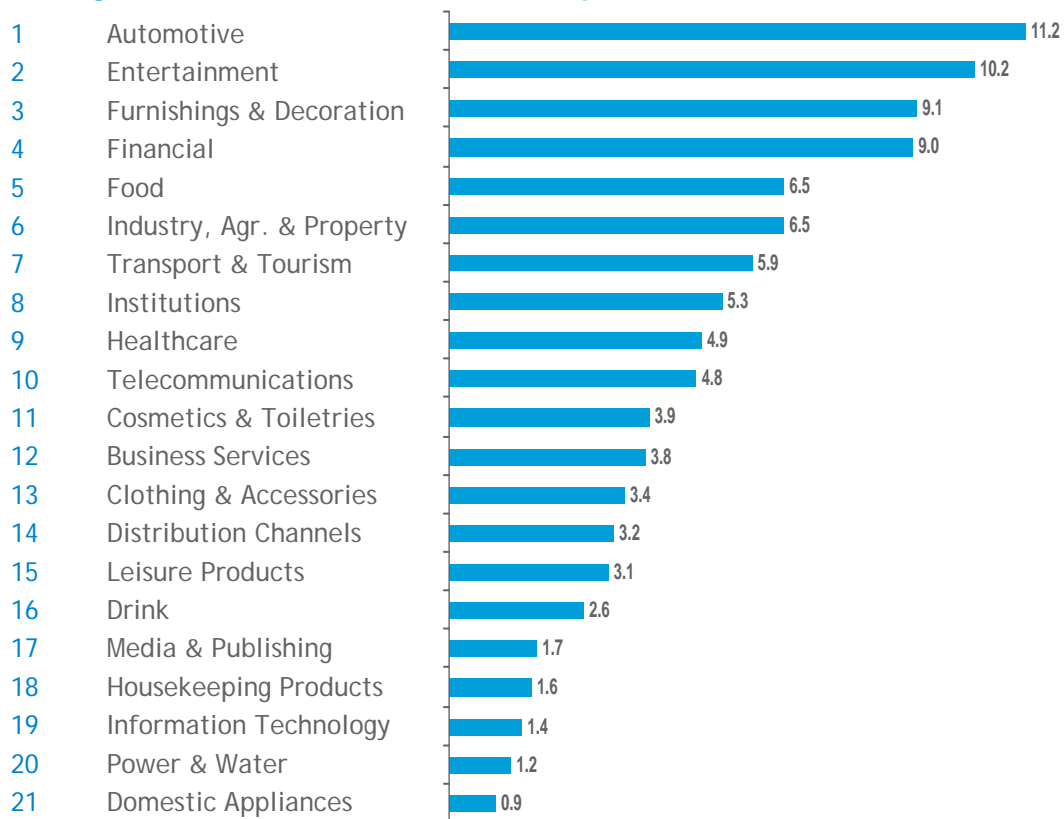
## Categories rank and % Share of Spend - Year to date



## Top 20 Advertisers

1	WESFARMERS	11	TOYOTA MOTOR
2	GOVERNMENT COMMONWEALTH	12	ANZ BANKING GROUP
3	WOOLWORTHS	13	UNILEVER
4	HARVEY NORMAN	14	SINGTEL GROUP
5	TELSTRA CORP	15	GOVERNMENT NSW
6	RECKITT BENCKISER	16	QANTAS AIRWAYS
7	GOVERNMENT VICTORIA	17	NESTLE
8	MCDONALD'S	18	PROCTER & GAMBLE
9	COMMONWEALTH BANK	19	SUNCORP GROUP
10	WESTPAC BANKING CORPORATION	20	GOVERNMENT QUEENSLAND

## Categories rank and % Share of Spend - Quarter



## Top 20 Advertisers

1	WESFARMERS	11	QANTAS AIRWAYS
2	GOVERNMENT COMMONWEALTH	12	SINGTEL GROUP
3	WOOLWORTHS	13	PROCTER & GAMBLE
4	HARVEY NORMAN	14	GOVERNMENT VICTORIA
5	TELSTRA CORP	15	COMMONWEALTH BANK
6	WESTPAC BANKING CORPORATION	16	VILLAGE ROADSHOW GROUP
7	ANZ BANKING GROUP	17	UNILEVER
8	RECKITT BENCKISER	18	NESTLE
9	MCDONALD'S	19	HYUNDAI
10	TOYOTA MOTOR	20	SUNCORP GROUP



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