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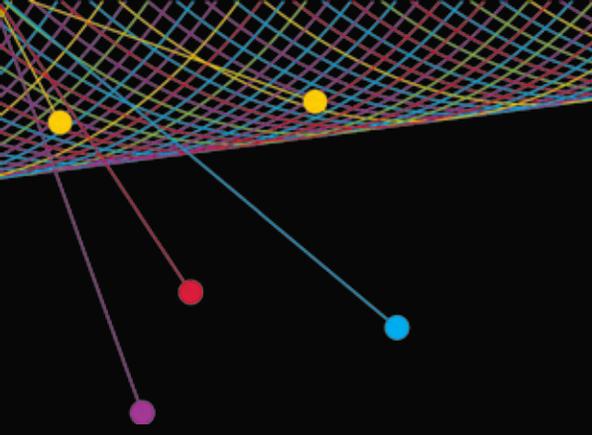
AN UNCOMMON SENSE  
OF THE CONSUMER™

# GLOBAL ADVIEW PULSE *lite*

YOUR CONNECTION TO GLOBAL  
ADVERTISING TRENDS

QUARTER 2 2013





# GLOBAL ADVIEW PULSE

YOUR CONNECTION TO GLOBAL  
ADVERTISING TRENDS  
QUARTER 2 2013



## SPOTLIGHT ON

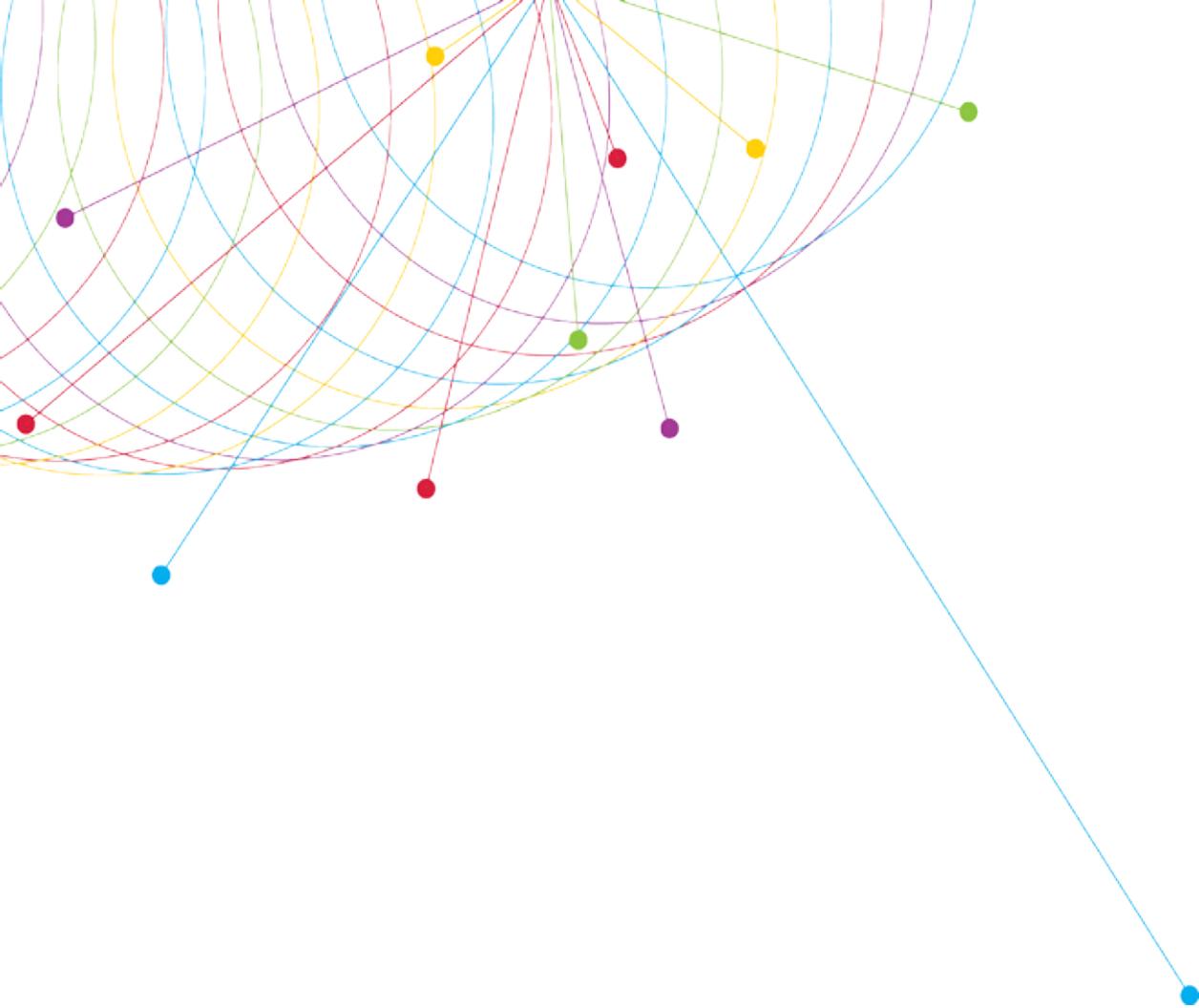
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Global AdView Pulse SPOTLIGHT

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accessories, Financial, Travel & Tourism,  
Motor Cars, Telecommunications

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# WORLD TRENDS

YEAR TO DATE



# GLOBAL ADVERTISING TRENDS

## YEAR TO DATE

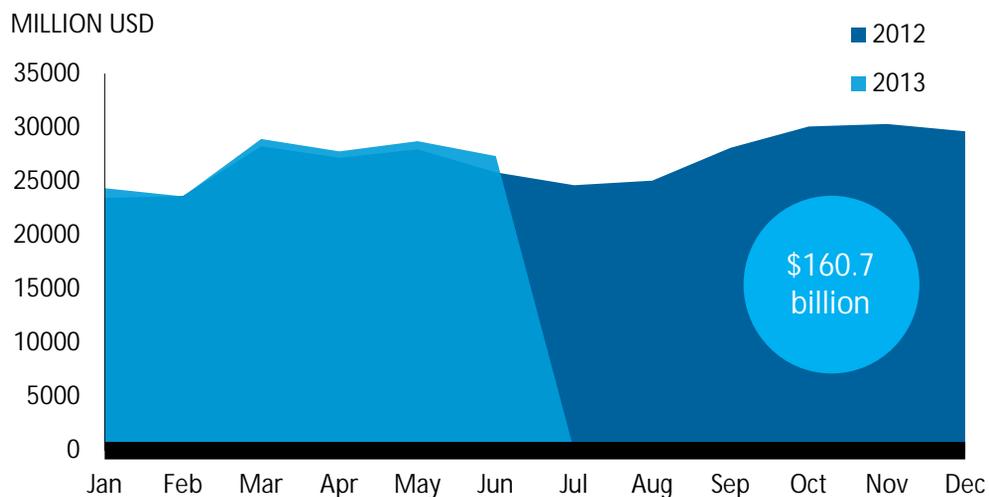
### MAIN EVENTS

- Global consumer confidence increases one point from Q1 to 94
- European consumer confidence holds steady for three consecutive quarters
- US economy posts better than expected results
- The civil war in Syria continues with increased potential of international intervention

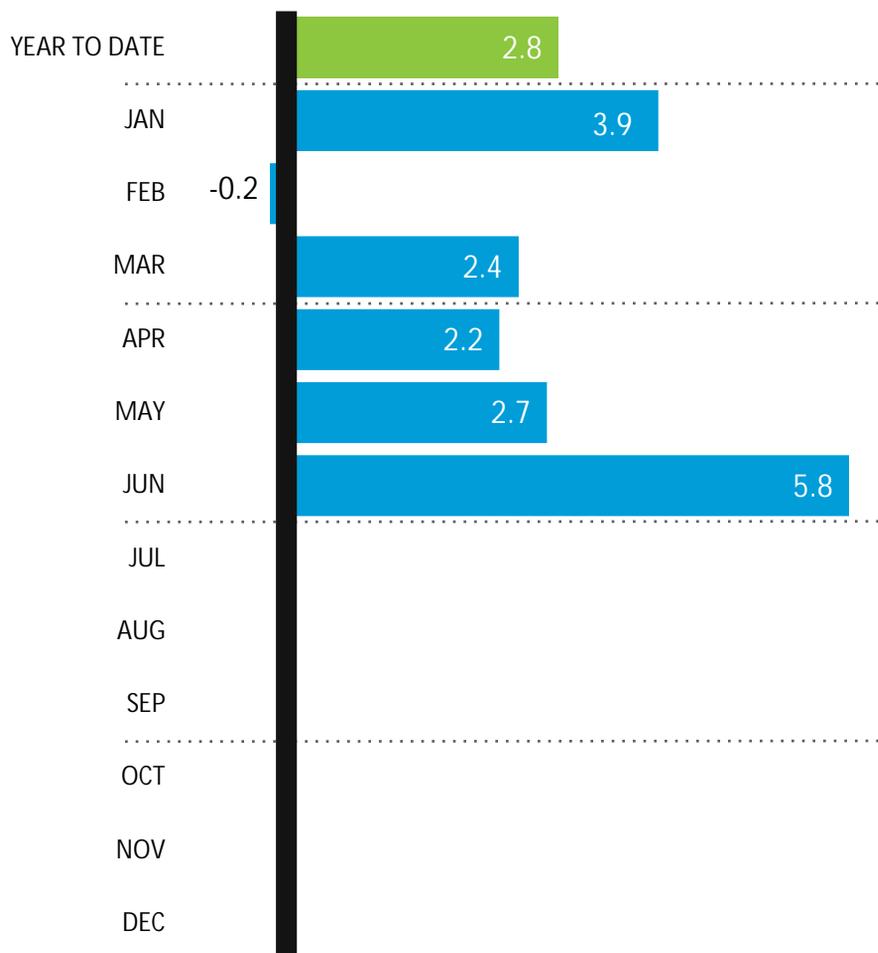
### MAIN FACTS

- Advertising grows 3.5 percent during Q2, and 2.8 percent for the first half of 2013
- Asia Pacific and Latin America lead the growth with healthy increases during the first half of 2013
- Advertisers pour investments into display Internet, which jumps 26.6 percent YTD

## ADVERTISING EXPENDITURE TREND



## YEAR ON YEAR % CHANGE BY MONTH



## MACRO ECONOMIC TRENDS

- GDP (constant prices)\* + 3.3%
- Consumer Prices\* + 3.8%
- Nielsen Consumer Confidence Index: 94\*\*  
(+1 compared to Q1 2013)

\*2013 vs. 2012 forecasts  
\*\*Q2 2013 survey

# GLOBAL AD SPENDING GAINS MOMENTUM IN Q2

Global advertising expenditures continued to increase gradually in the second quarter of 2013, growing 3.5 percent from Q2 2012, and 2.8 percent from the year-to-date (January to June), according to Nielsen's quarterly Global AdView Pulse report. Although marketers remain conservative with advertising budgets, Latin America continues its pattern of healthy growth with a 13.1 percent increase YTD.

All regions contributed to global growth for the first half of the year except Europe, which remains modest with ad budgets amidst the region's continued fiscal crisis, resulting in a 6 percent decline for the period. Despite this, ad spend is recovering globally, with growth of 3.9 percent in the Middle East & Africa, 2.7 percent in North America and a more substantial 6.4 percent in Asia Pac.

Argentina contributed significantly to growth for Latin America with nearly 30 percent growth and in the Asia Pacific, Indonesia, China, Malaysia, and the Philippines all contributed to the region's ad spend growth with double-digit increases for the first half of 2013. In Europe, Norway, Switzerland, and Greece were the only countries where ad spend increased while the rest of the countries in the region unsurprisingly declined.

While Television advertising unsurprisingly retained its spot as the most favored medium through which to reach consumers (with investments increasing 4.2% for the first half of 2013), display Internet spending skyrocketed 26.6 percent during the same period, fueled by large increases from Latin America and the Asia Pacific.

Industry & Services advertising (namely the Industry, Agriculture, and Property category) climbed 7.2 percent for the year-to-date—marking the highest percentage increase in ad investments for first half of 2013.

FMCG advertising increased 5.7 percent, with healthy investments in the Cosmetics & Toiletries, Drinks, and Housekeeping Products categories.

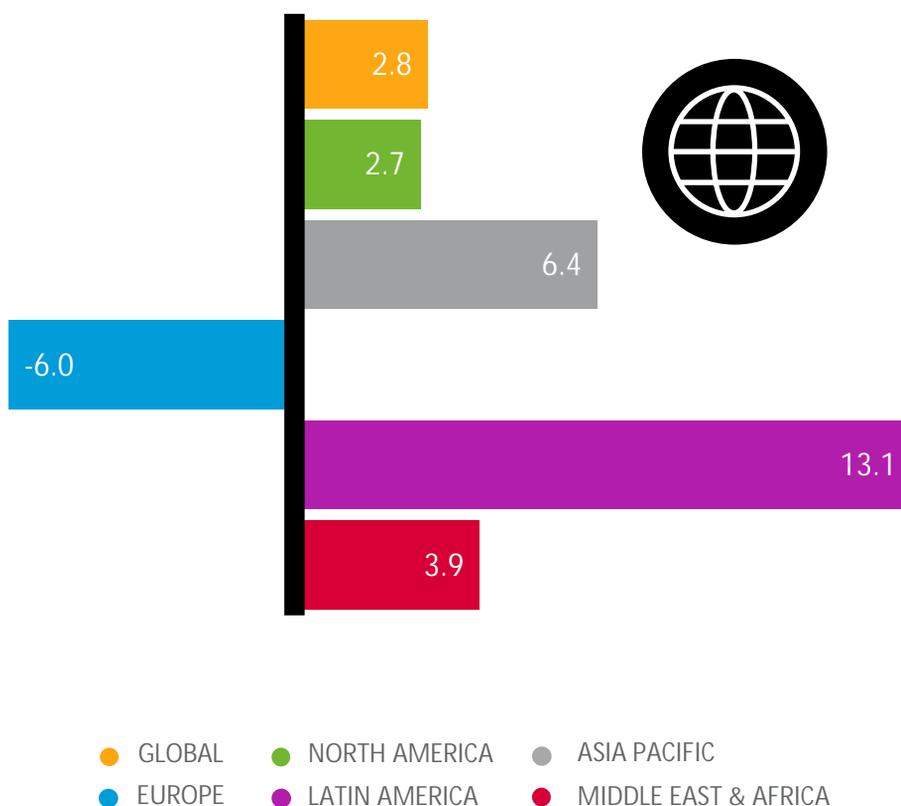
## TRENDS TO WATCH

Though Europe's advertising budget cuts deepened in the second quarter, signs of optimism are popping up globally.

With better-than-expected economic results from the US in the second quarter (and increased momentum in the country's advertising market), and subtle signs that declines in some of the hardest hit markets in Europe are finally bottoming out, Nielsen will be watching to see if the global advertising market continues to gain speed in the second half of 2013.

*\* based mainly on estimated net figures*

### REGIONS - YEAR ON YEAR % CHANGE



## MEDIA TYPES

The second quarter of 2013 followed suit of the first, according to Nielsen's quarterly Global AdView Pulse report, continuing in the same vein with Television as the front-running media format based on ad spend with 57.6 percent media share and 4.2 percent year over year global growth for the first half of 2013. All regions except the embattled European region contributed to Television's growth.

Other than Television, traditional media took some hits to ad spend budgets in the first half of 2013, with spending in Newspapers, Magazines and Radio all declining in the second quarter (-2.0%, -1.9% and -0.9%, respectively). Despite this, the three hold the second third and fourth ranks based on share of media spend. Ad spend in Cinema took the largest hit of all media types this quarter, with a 5.9 percent drop for the period, as all regions declined except Latin America.

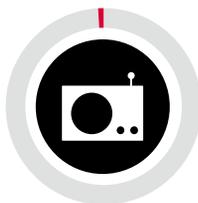


Television remains the most favored means on communicating with customers with a **57.6** percent share of spend.

### MEDIA -- % CHANGE YEAR TO DATE



▲ 4.2% TELEVISION



▼ -0.9% RADIO



▲ 5.0% OUTDOOR



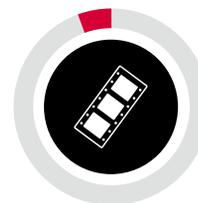
▼ -2.0% NEWSPAPERS



▼ -1.9% MAGAZINES



▲ 26.6% INTERNET



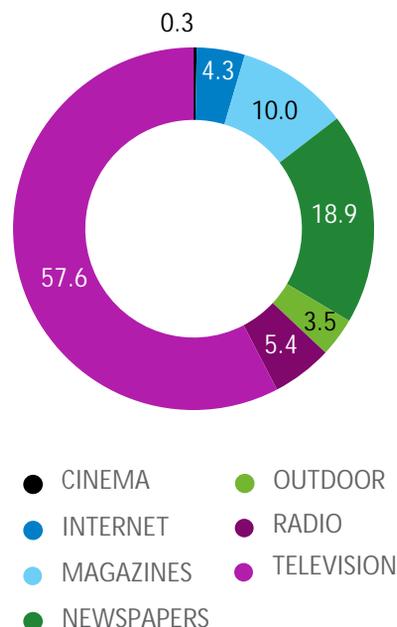
▼ -5.9% CINEMA

## MEDIA TYPES - CONTINUED

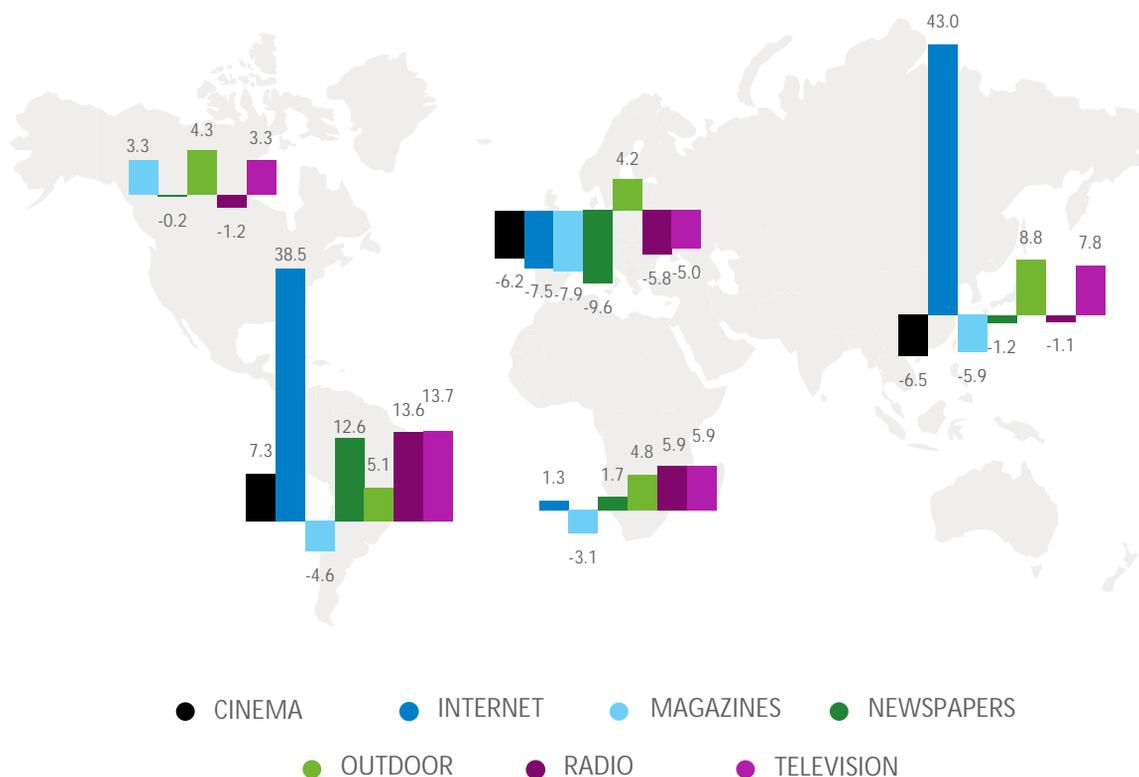
Display Internet advertising, though measured in a smaller subset of countries, continued to experience double-digit increases in the first half of the year with a 26.6 percent growth over the comparable period in 2012. As was the case in the first quarter of the year, Asia Pac and Latin America contributed heavily to this growth with increases of 43 and 38.5 percent respectively.

Outdoor ad spend grew 5 percent and was the only media type to grow in all regions measured.

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



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



# MACRO SECTORS

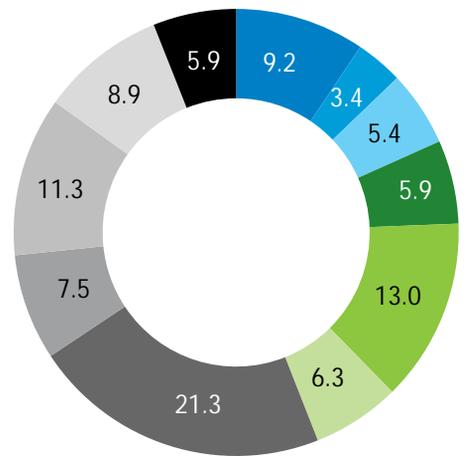
Industry & Services and FMCG advertising saw the biggest percentage gains in spending during the first half of 2013, at 7.2 percent and 5.7 percent respectively.

The Industry & Services macro sector, driven by advertising in the Property category, saw an impressive 23.3 percent increase in Asia Pacific.

The growth in FMCG was driven by an increase in Drinks advertising, with Cold Drinks advertising spiking in the Asia Pacific in the lead-up to the warmer summer months.

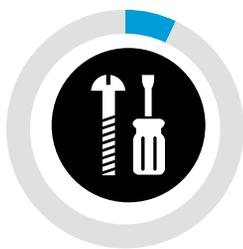
Automotive advertising, on the other hand, declined by -3.1 percent during the first half of 2013—fueled by a -9.8 percent decline in the Asia Pacific. Automotive advertisers were still active in North America, Latin America, and the Middle East & Africa, however—with the latter two regions increasing Automotive advertising budgets into the double-digits.

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



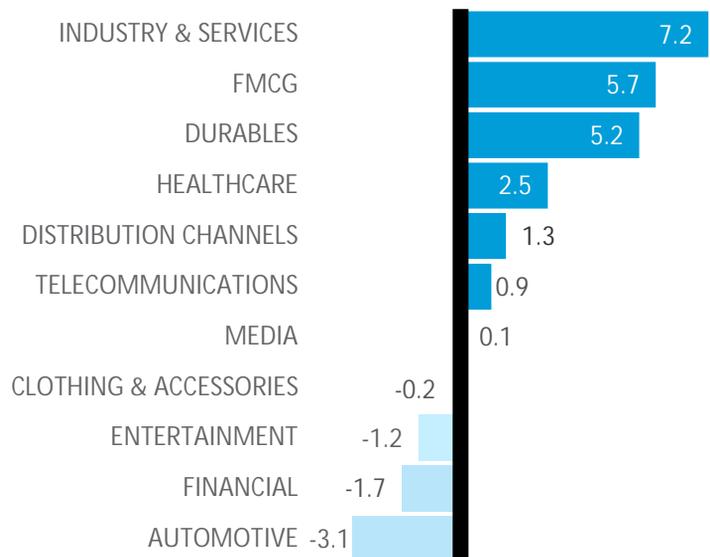
- AUTOMOTIVE
- CLOTHING & ACCESS.
- DISTRIBUTION
- DURABLES
- ENTERTAINMENT
- FINANCIAL
- FMCG
- HEALTHCARE
- INDUSTRY & SERV.
- MEDIA
- TELECOM.

## SECTORS - % CHANGE YEAR TO DATE

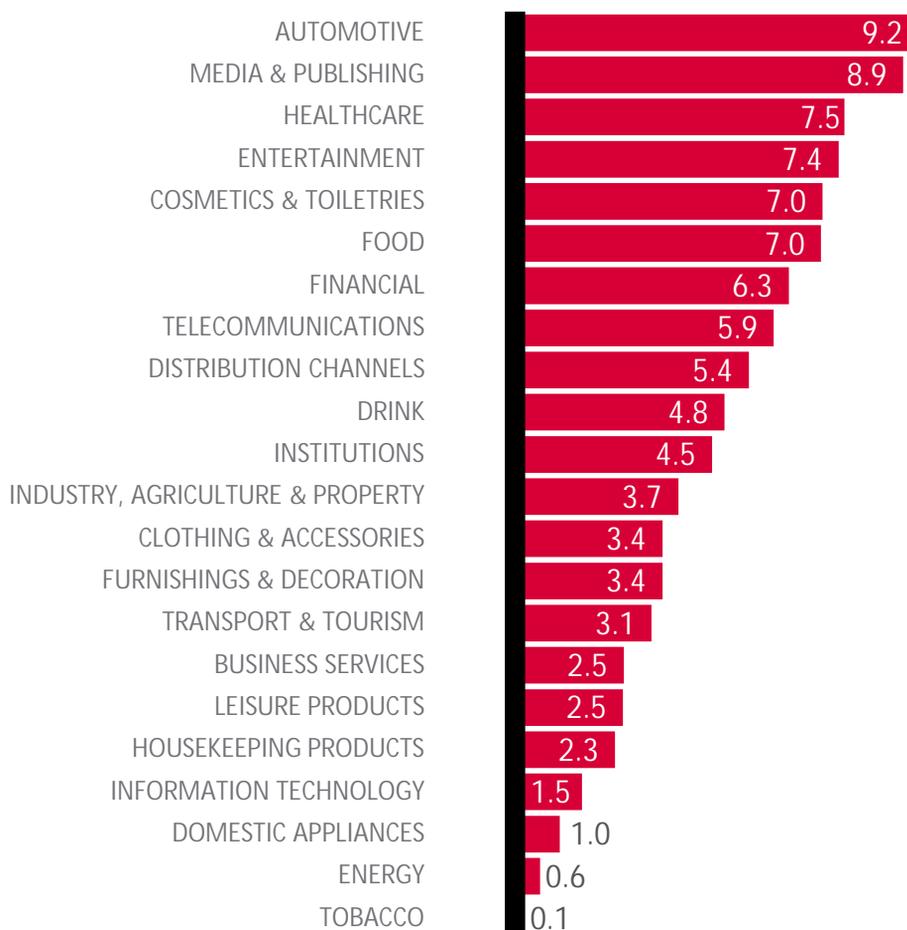


**INDUSTRY & SERVICES**  
increase ad budgets by 7.2%  
year-to-date

Healthy increases also seen in FMCG and Durables advertising



## CATEGORIES RANK AND % SHARE OF SPEND, YTD



## TOP 20 GLOBAL SPENDERS, YTD



PROCTER & GAMBLE  
 UNILEVER  
 L'OREAL  
 FORD MOTOR COMPANY  
 GENERAL MOTORS  
 TOYOTA  
 MCDONALD'S  
 AT&T  
 VOLKSWAGEN GROUP  
 NESTLE

HONDA MOTOR  
 MICROSOFT  
 PEPSICO  
 TIME WARNER  
 THE COCA COLA COMPANY  
 NISSAN  
 MARS  
 JOHNSON & JOHNSON  
 SAMSUNG ELECTRONICS  
 PFIZER



# METHODOLOGY NOTES



# METHODOLOGY

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

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

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

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

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

\* Provided by Mediatrix

\*\* Provided by Nielsen CC Data

\*\*\* AGB Nielsen in association with Ipsos

\*\*\*\* In association with Media Focus

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

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

The source for the macro-economic indicators is IMF (International Monetary Fund) – World Economic Outlook April 2013 (website: [www.imf.org](http://www.imf.org)).

The Nielsen Global Survey of Consumer Confidence and Spending Intentions was conducted between May 13–May 31, 2013 and polled more than 29,000 online consumers in 58 countries throughout Asia-Pacific, Europe, Latin America, the Middle East, Africa and North America. The sample has quotas based on age and sex for each country based on their Internet users, and is weighted to be representative of Internet consumers and has a maximum margin of error of  $\pm 0.6\%$ . This Nielsen survey is based on the behavior of respondents with online access only. Internet penetration rates vary by country. Nielsen uses a minimum reporting standard of 60 percent Internet penetration or 10M online population for survey inclusion. The China Consumer Confidence Index is compiled from a separate mixed methodology survey among 3,500 respondents in China. The Nielsen Global Survey, which includes the Global Consumer Confidence Index, was established in 2005.

Figures are expressed in Million USD and are estimated net with Nielsen Global AdView estimated weighting factors, except for Australia, Ireland and the UK which are estimated net at source. USA and Spanish figures are based on apples-to-apples comparisons to the previous year, both in terms of coverage and methodology, in order to give a more accurate representation of the trends. The source for the exchange rates is OANDA (website: [www.oanda.com](http://www.oanda.com)) and the rate applied to all figures is the 2012 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:** Belgium, Croatia, Germany, Greece, Ireland, Italy, The Netherlands, Norway, Portugal, Spain, Switzerland, Turkey, United Kingdom.
  - **Latin America:** Argentina, Brazil, Mexico, Puerto Rico.
  - **Middle East and Africa:** Bahrain, Egypt, Kuwait, Lebanon, Oman, Pan-Arab Media, Qatar, Saudi Arabia, South Africa, United Arab Emirates.

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

- **Country breakdown** refers to all major media types available in the country (Television, Newspapers, Magazines, Radio, Outdoor, Cinema, 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.



## CONTACT

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## NIELSEN GLOBAL ADVIEW

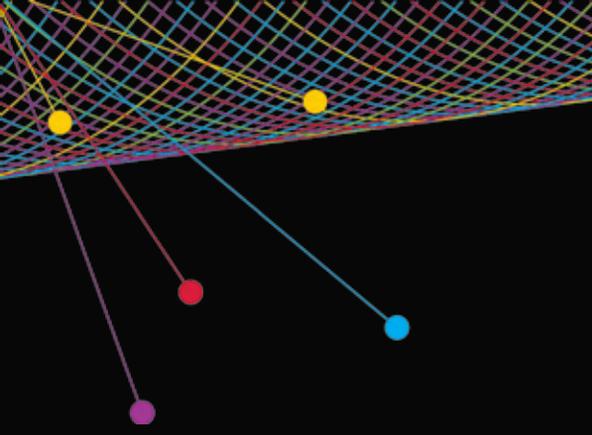
Nielsen Global AdView provides information on what advertisers are spending, where and how, in more than 80 countries. With a deep and complete knowledge of local market advertising trends, ad spend, creatives, and TV gross rating points (GRPs) can be compiled, linked and harmonized at brand and product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

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## ABOUT NIELSEN

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

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ADVERTISING TRENDS

QUARTER 1 2013



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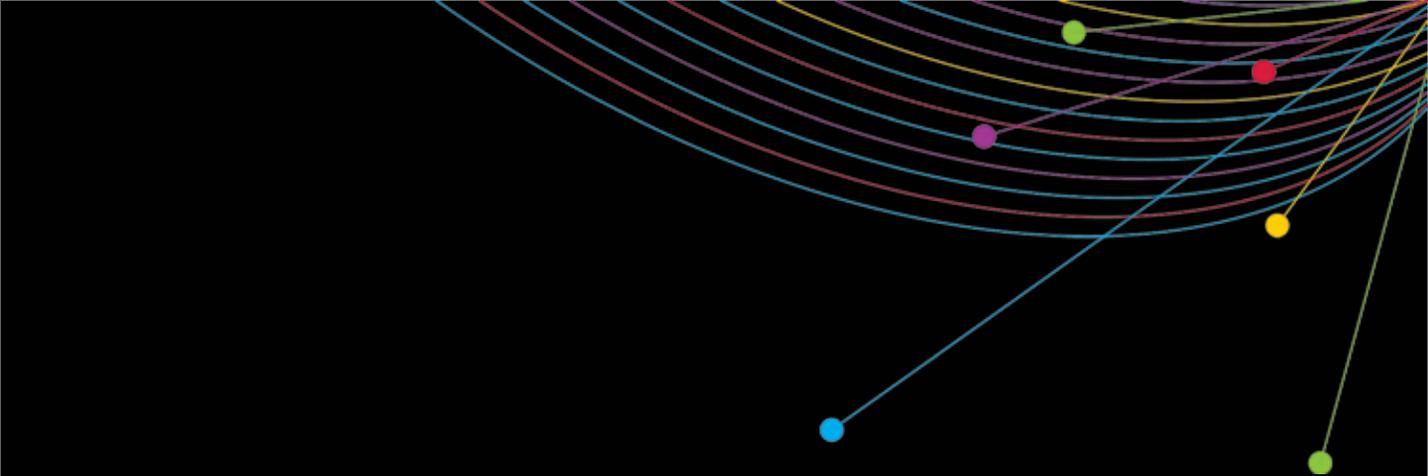
By media  
type and  
sector



By region and  
country

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