



Global AdView Pulse

Your connection to
global advertising trends
Quarter 1 2011

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World Trends

Year to date

Global Advertising Trends

Year to date

World Trends

Main Events

- The first quarter was tumultuous one for two regions: the Asia Pacific and the Middle East
- Asia Pacific was hit by a string of horrible natural disasters in Australia, New Zealand, and Japan
- A series of uprisings and protests took place in Tunisia, Egypt, Bahrain, Syria, and Yemen, with a civil war ongoing in Libya
- Greece is on the verge of financial collapse, with fears that this could launch the globe into another financial crisis

Main Facts

- Advertising continues to grow in all regions, with Asia Pacific, Latin America and Middle East showing double-digit percentage increases
- All four major media types show growth. TV shows the largest increase whilst Newspapers report the most contained growth
- All sectors increased their ad spend though FMCG showed slightly slower growth this quarter. Healthcare, with the most contained growth in 2010, is back to reporting double-digit increases

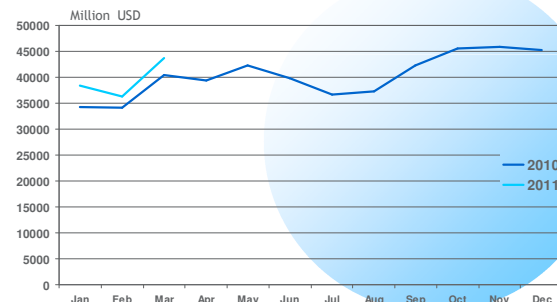
Macro Economic Trends

- GDP (constant prices)** + 4.4%
- Consumer Prices** + 4.5%
- Nielsen Consumer Confidence Index*: 92 (+2 compared to Q4 2010)

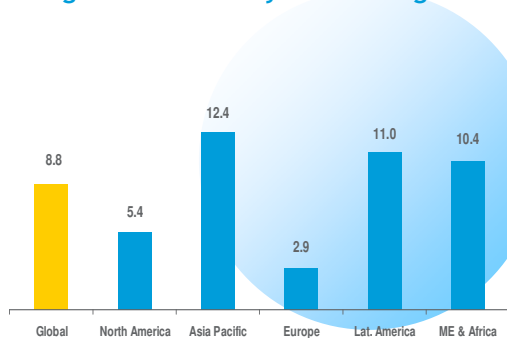
**2011 vs 2010 forecasts

* Q1 2011 survey

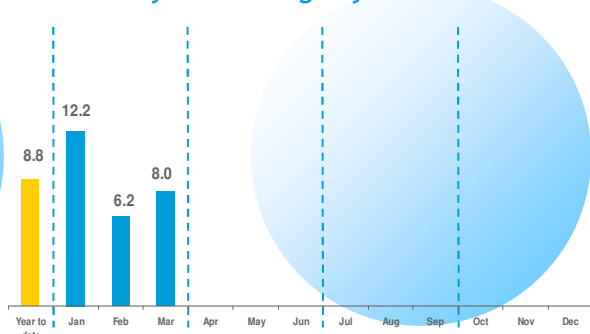
Advertising Expenditure Trend



Regions -- Year on year % change



Year on year % change by month



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

The first quarter of 2011 was a tumultuous one for two regions in particular: the Asia Pacific and the Middle East. Beginning in December 2010 and continuing into 2011, floods in the Queensland and Victoria areas hit Australia's communities and its economy—totaling an approximately AUD\$30 billion (US\$28 billion) reduction in the country's GDP. Shortly after the floods subsided, New Zealand was hit with a 6.3 magnitude earthquake, which took the lives of 181 people and resulted in NZ\$15-16 billion (US\$11 billion) in damage. Although horrible occurrences in both countries, these events would almost dwarf in comparison to the next natural disaster that would take place: the Great East Japan Earthquake and Tsunami that hit the country on 11 March 2011. Over 15,000 deaths were reported, with over 7,500 people still missing. Prime Minister Naoto Kan reported that “in the 65 years after the end of World War II, this is the toughest and the most difficult crisis for Japan.” The total cost of the damage is estimated at over US\$300 billion.

On the other side of the world, the Middle East ended 2010 with the ouster of Tunisian President Ben Ali, which precipitated the overthrow of President Hosni Mubarak in Egypt, a civil war in Libya, and uprisings in Bahrain, Syria, and Yemen. The civil unrest has created ripples throughout the region, with protests also occurring in Algeria, Iraq, Jordan, Morocco, and Oman.

Although these two regions were hit hard economically in the first quarter, the people have importantly remained positive: according to a McCann Worldgroup study, 74 percent of Japanese people expressed confidence in Japan's ability to recover. Consumer confidence in the Middle East has risen in the first quarter. In markets like Egypt, where the advertising market plummeted -51.3 percent, consumer confidence rose 29 points in the first quarter from the fourth quarter—to 102 points. Globally, consumer confidence has risen two points from the fourth quarter of 2010 to 92 points.

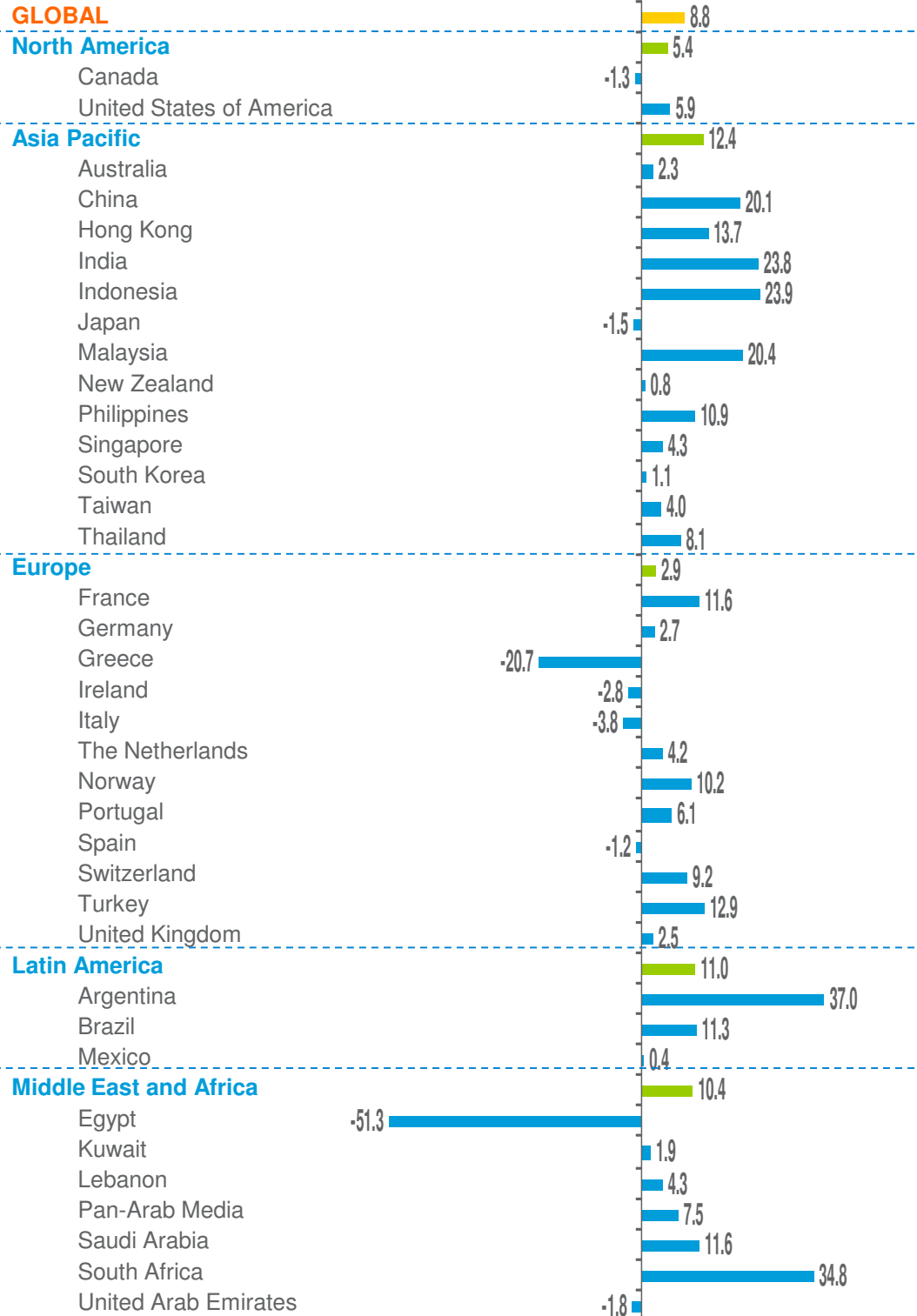
Takeshi Minami, chief economist at the Norinchukin Research Institute, reported to Reuters in June that “emerging economies are tightening monetary policy so they may experience some slowdown, while advanced economies are also seeing very slow growth.”

This sentiment seems to also reflect the advertising market in the first quarter of 2011. While markets such as the Asia Pacific (+12.4%) and the Middle East and Africa (+10.4%) emerged from the first quarter with healthy growth over the same quarter in 2010, mature markets such as North America (+5.4%) and Europe (+2.9%) showed much more contained growth during the first quarter.

Television continued to assert its dominance globally, with a +11.9 percent growth during the first quarter—increasing its share of spend amongst other media types from 63.5 percent year-to-date in 2010 to 65.3 percent in 2010.

Global trend - overview by region and country

Year on Year % change



Ad Spend Growth - adjusted for inflation

Although some markets have shown high ad spend growth, actual growth should be taken in context along with inflation rates, as this may provide a more accurate view of growth within that market. When adjusted for inflation, South Africa and Argentina show the highest advertising growth—at 29.9 and 26.7 percent growth respectively. India, which faces a higher inflation rate of 7.5 percent, shows a 16.3 percent growth in ad spend when adjusted for inflation. These adjusted trends are provided to give an indication of the true growth and decline in advertising markets covered in the Nielsen Global AdView Pulse; actual adjusted spend trends may vary.

	Ad spend Year on Year % change	% Inflation average consumer prices	Adjusted ad spend, corrected for inflation
North America			
Canada	-1.3	2.2	-3.5
USA	5.9	2.2	3.7
Asia Pacific			
Australia	2.3	3.0	-0.7
China	20.1	5.0	15.1
Hong Kong	13.7	5.8	7.9
India	23.8	7.5	16.3
Indonesia	23.9	7.1	16.8
Japan	-1.5	0.2	-1.7
Malaysia	20.4	2.8	17.6
New Zealand	0.8	4.1	-3.3
Philippines	10.9	4.9	6.0
Singapore	4.3	3.3	1.0
South Korea	1.1	4.5	-3.4
Taiwan	4.0	2.0	2.0
Thailand	8.1	4.0	4.1

Ad Spend Growth - adjusted for inflation

	Ad spend Year on Year % change	% Inflation average consumer prices	Adjusted ad spend, corrected for inflation
Europe			
France	11.6	2.1	9.5
Germany	2.7	2.2	0.5
Greece	-20.7	2.5	-23.2
Ireland	-2.8	0.5	-3.3
Italy	-3.8	2.0	-5.8
Netherlands	4.2	2.3	1.9
Norway	10.2	1.8	8.4
Portugal	6.1	2.4	3.7
Spain	-1.2	2.6	-3.8
Switzerland	9.2	0.9	8.3
Turkey	12.9	5.7	7.2
UK	2.5	4.2	-1.7
Latin America			
Argentina	37.0	10.2	26.8
Brazil	11.3	6.3	5.0
Mexico	0.4	3.6	-3.2
Middle East & Africa			
Egypt	-51.3	11.5	-62.8
Kuwait	1.9	6.1	-4.2
Lebanon	4.3	6.5	-2.2
Saudi Arabia	11.6	6.0	5.6
South Africa	34.8	4.9	29.9
United Arab Emirates	-1.8	4.5	-6.3

Ad Spend Industry Forecasts - 2011 and 2012

Industry bodies have forecasted global advertising spend growth rates between 4.2 and 5.4 percent for 2011, with slightly higher growth predicted for 2012 (between 5.8% and 6.4%). Forecasts were slightly downgraded after the Great East Japan Earthquake in March and the "Arab Spring" which is ongoing in the Middle East. The largest potential growth for 2011 is seen in forecasts for China (+13.3% to 17.0%) and India (+17.5% to 19.0%) with forecasts as high as 23.3 percent for Russia.

estimated % growth 2011 vs 2010

Source	ZenithOptimedia (Apr 2011)		WARC (May 2011)		Carat (Aug 2010)		Magna Global (Jan 2011)**	
Country	2011 vs 2010	2012 vs 2011	2011 vs 2010	2012 vs 2011	2011 vs 2010	2012 vs 2011	2011 vs 2010	2012 vs 2011
Global	4.2	5.8	5.1*	6.2*	4.7		5.4	6.4
North America	2.6	3.5						
Canada			5.3	5.3	4.5		3.7	4.0
USA	2.5	3.4	2.8	4.4	1.7		2.4	5.0
Asia Pacific	4.6	8.3			7.6		10.0	10.0
Australia			5.9	5.0	5.8		6.0	6.0
China	13.6	13.6	13.3	14.2	15.3		17.0	17.0
India			17.5	16.9			19.0	19.0
Japan	-4.1	4.6	-0.8	2.7	-3.1		1.0	1.0
Western Europe	3.5	3.7	2.7					
France	2.9		2.6	2.6	2.7		1.0	1.0
Germany	2.4		2.6	2.2	0.9		2.0	2.0
Italy			3.0	3.6	2.9		4.0	4.0
Spain	2.1***		2.4	3.7	1.1		2.0	2.0
UK			3.3	4.6	4.1		3.0	3.0
Central and Eastern Europe	10.0	13.4			10.2			
Russia	23.3		16.2	17.5	15.3		10.0	10.0
Latin America	7.9	7.7			14.0		14.0	12.3
Brazil	15.4		10.8	10.5	14.4		11.0	11.0
Middle East and Africa	0.1^	4.8^						
Egypt	-20.0	12.1					11.0	11.0
South Africa							11.0	11.0

Notes:

* 12 major advertising markets worldwide

**Magna Global estimates at constant prices. All others at dynamic prices. Single country estimate is an average of the next five years.

***Zenith Vigia - January 2011 survey

^Middle East and North Africa

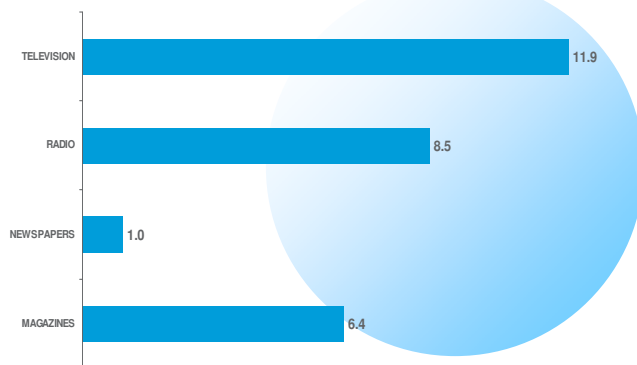
Source	Zenith	WARC	Carat	Magna Global
Media Type	Apr-11	May-11	Aug-10	Jan-11
Television	5.5	5.7	45.4	6.0
Radio	2.6		7.0	3.1
Newspapers	-2.3		18.7	0.7
Magazines	-1.2		9.8	0.8
Outdoor	5.8	6.2	6.4	7.9
Cinema	6.2		0.5	8.8
Internet	13.6	13.0	12.1	12.5

*Magna Global estimates at constant prices. All others at dynamic prices

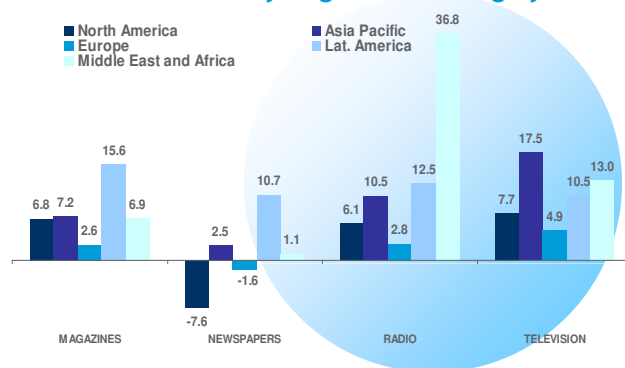
Media Types

All four major media types showed positive numbers globally during the first quarter of 2011, with Television continuing its reign as by far the leading media type. Television, which holds the highest share of spend (65.3%), showed a 11.9 percent growth in the first quarter of 2011 when compared with Q1 2010. Television grew impressively in the Asia Pacific, with a +17.5 percent growth, whereas mature markets like North America (+7.7%) and Europe (+4.9%) showed growth at a slightly more contained rate. Radio performed the second-best compared with Television, registering an 8.5 percent growth in the first quarter of 2011—the same growth registered in 2010 vs 2009. Magazines also reported a positive trend at 6.4 percent, but Newspapers reported a growth of only 1.0 percent—reflecting the declines experienced in both North America (-7.6%) and Europe (-1.6%). Consistent with trends witnessed in 2010, Radio, Magazines, and Newspapers continued to lose some of their share of spend to Television.

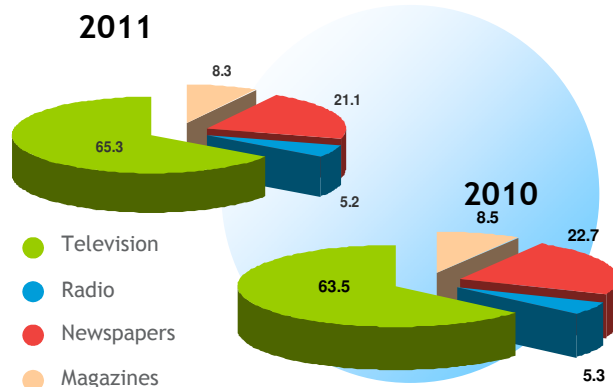
Media -- % change year to date



Media by Region -- % change year to date



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

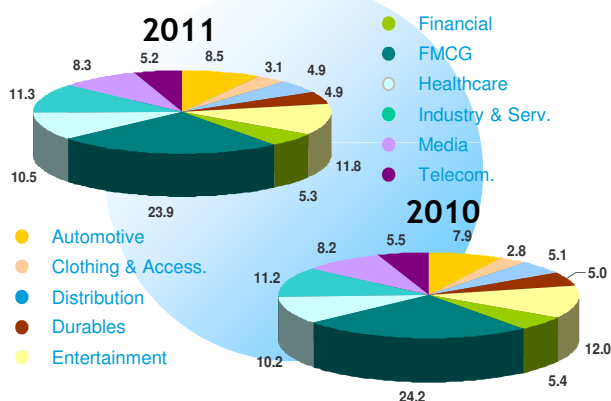


Macro - Sectors

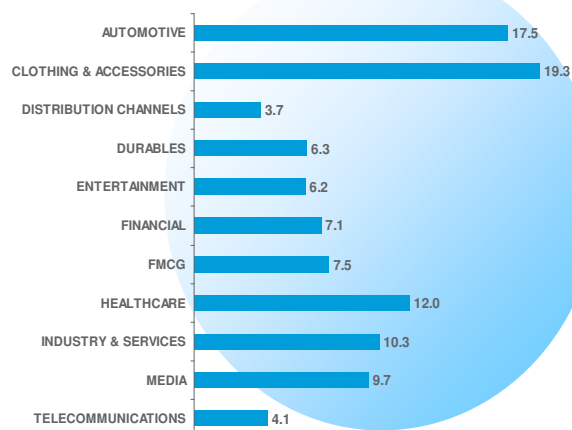
All sectors increased their advertising expenditures in the first quarter of 2011 when compared with Q1 2010, though at a slower growth than witnessed in 2010—which may be largely due the higher basis of comparison. Ad spend for the sector with the highest share of spend, FMCG, grew by 7.5 percent against Q1 2010—with very slight growth noted in North America (+1.6%) and a decline seen in Europe (-3.1%).

Automotive (+17.5%), Clothing & Accessories (+19.3%), Industry & Services (10.3%), and Healthcare (+12.0%) all reported double-digit ad spend growth during the first quarter, with Financial also performing well with a 7.1 percent growth. Healthcare's growth was particularly noteworthy, as it was the sector with the smallest percentage increase overall in 2010 (+1.7%). Representing a 10.5 percent share of spend amongst all macro sectors, Healthcare only experienced a minor decline in spend in Europe, at -2.0 percent.

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

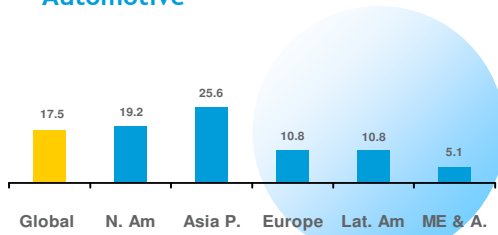


Sectors -- % change year to date

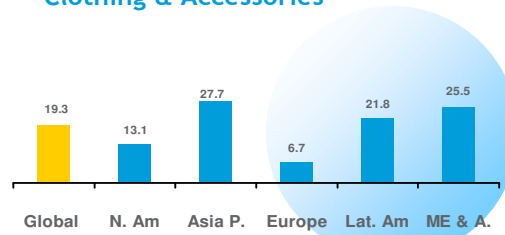


Macro - Sectors: % change by Region

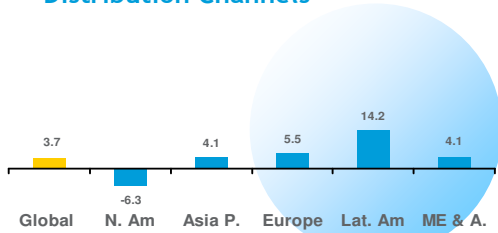
Automotive



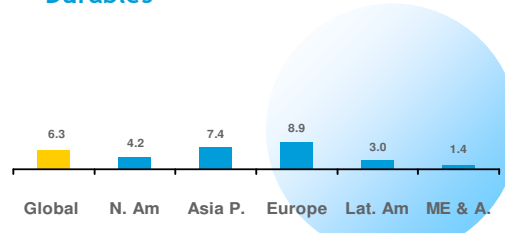
Clothing & Accessories



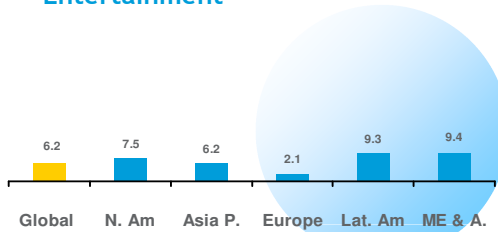
Distribution Channels



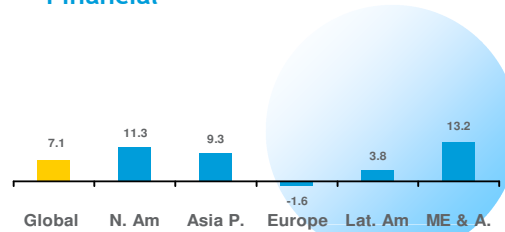
Durables



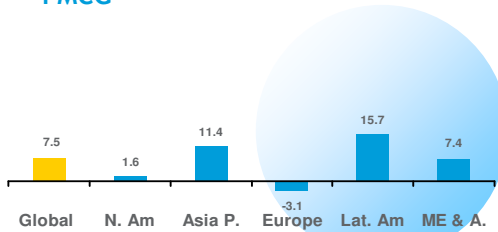
Entertainment



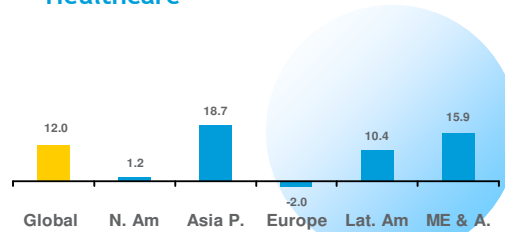
Financial



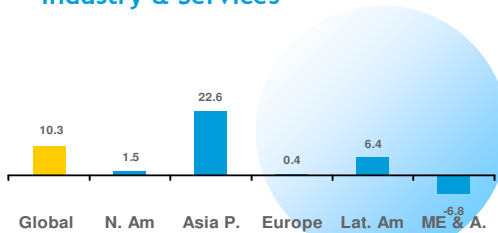
FMCG



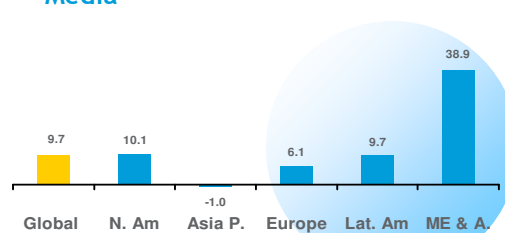
Healthcare



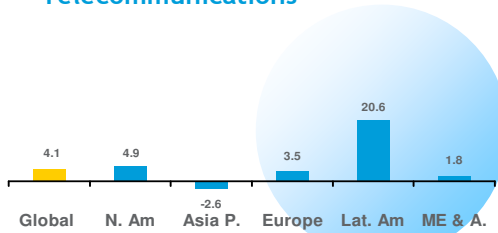
Industry & Services



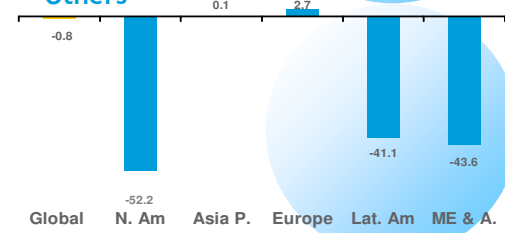
Media



Telecommunications



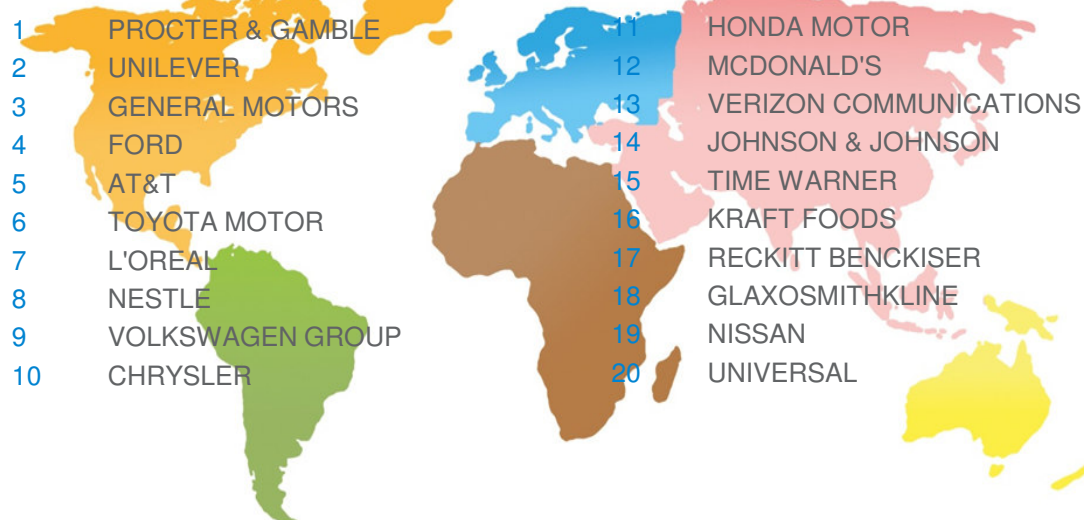
Others



Categories rank and % Share of Spend



Top 20 Global Spenders







Regional overview

North America

Region Overview

Driven by positive performance in the US and in particular strong performance in the month of March (+13.4%), the North American region finished the first quarter of 2011 with a growth of +5.4 percent compared to Q1 2010. Although all media types showed positive trends during 2010, Newspapers were the only media type to show a decline during the first quarter of 2011 (-7.6%). Magazines, on the other hand, remained in the positive with a 6.8 percent increase in the first quarter of 2011. With regard to the sectors, Distribution Channels was the only sector to show a decline (-6.3%). Healthcare, which ended 2010 with a decline of -3.3

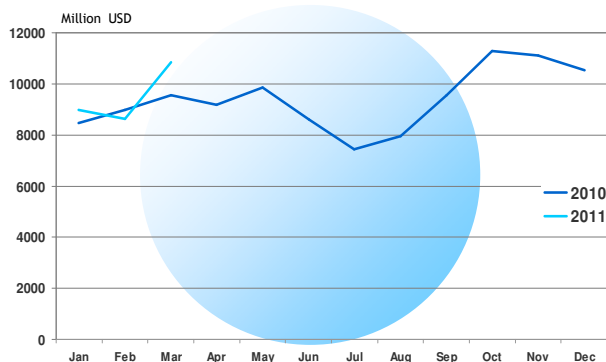


Highlights

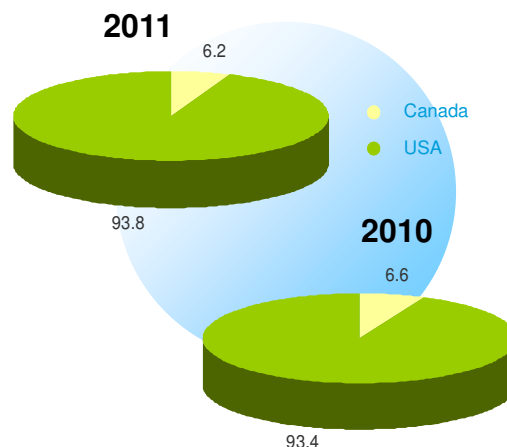
- Advertising grows by 5.4% in Q1 2011 vs Q1 2010
- Newspapers were hit hard with a -7.6% decline
- Automotive ad market continues its rebound with a 19.2% growth over Q1 2010

percent, importantly showed growth in the first quarter at +1.2 percent, while Automotive and Financial continued their double-digit performance at +19.2 percent and 11.3 percent respectively. FMCG, a sector that showed decline in Europe, also showed very contained growth in North America during the first quarter—growing marginally at +1.6 percent. The sector with the largest share of spend at +16.5 percent, Entertainment, grew by +7.5 percent when compared with Q1 2010.

Market -- Advertising Expenditure Trend



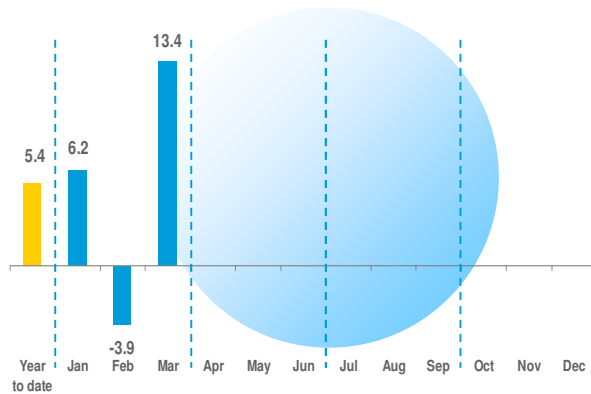
Countries -- % Share of Spend -- YTD



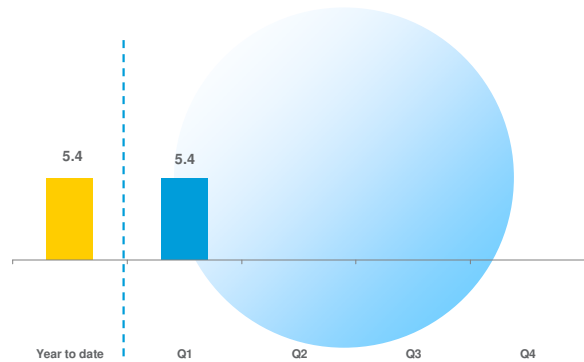
Note: media included in the region overview: Television, Newspapers, Magazines and Radio

NORTH AMERICA

Market -- Year on year % change by month

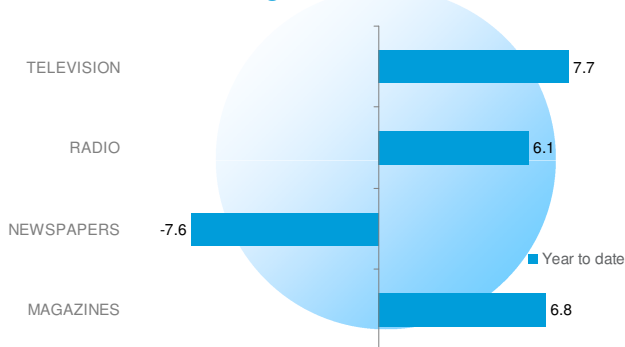


Market -- Year on year % change by quarter

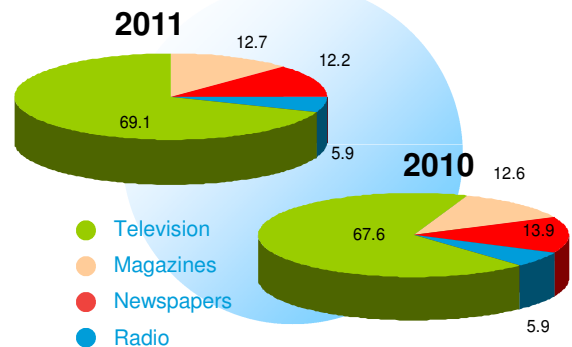


Media Types

Media -- % change YTD

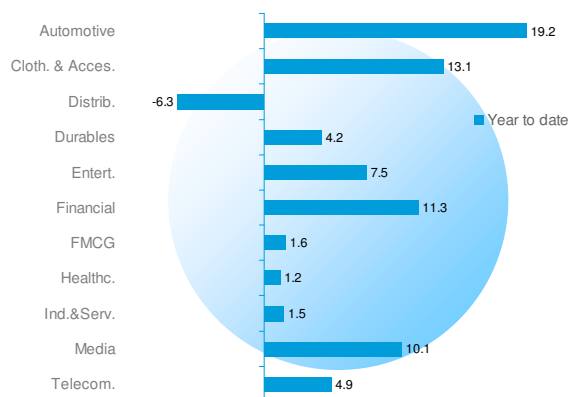


Media -- % Share of Spend -- YTD

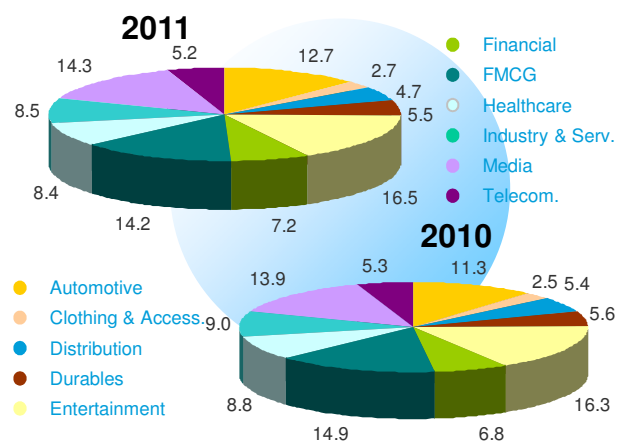


Macro-Sectors

Sectors -- % change YTD

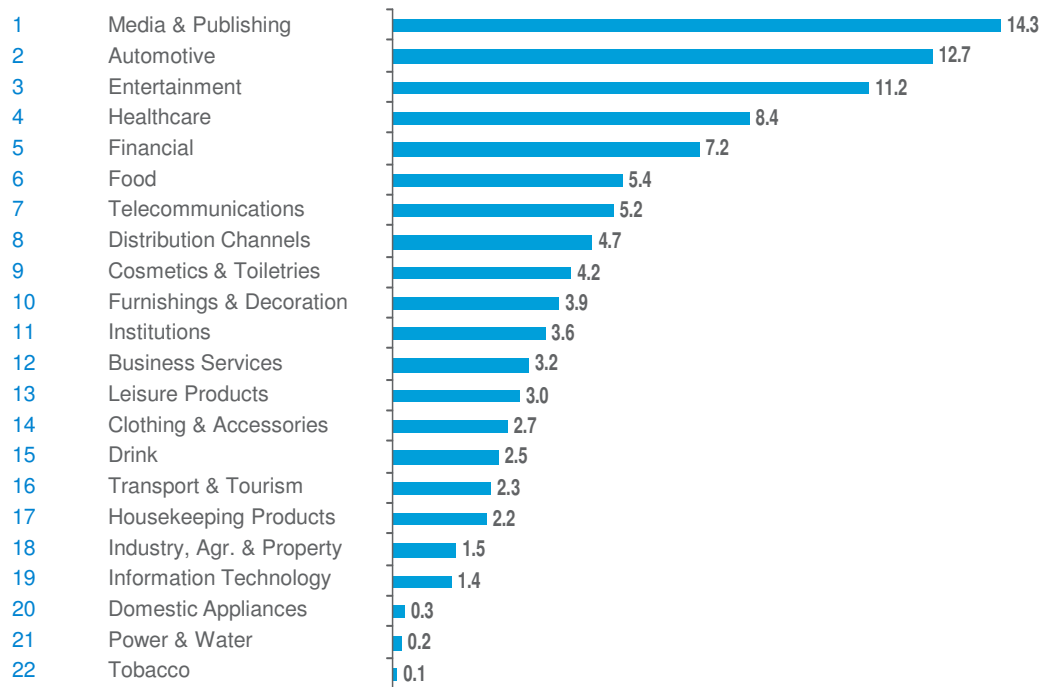


Sectors -- % Share of Spend -- YTD





Categories rank and % Share of Spend - Year to date



Asia Pacific

Region Overview

After the 10.1 percent growth witnessed in the Asia Pacific during 2010, the advertising market grew by 12.4 percent in the first quarter of 2011 when compared with the same quarter in 2010. This growth was witnessed in spite of the dramatic earthquake and tsunami which occurred in Japan, which brought the market with the second largest advertising spend in the region down to a -1.5 percent decline on ad spend for the quarter. The decline was contained by commitments already made by advertisers—therefore, although many advertisers

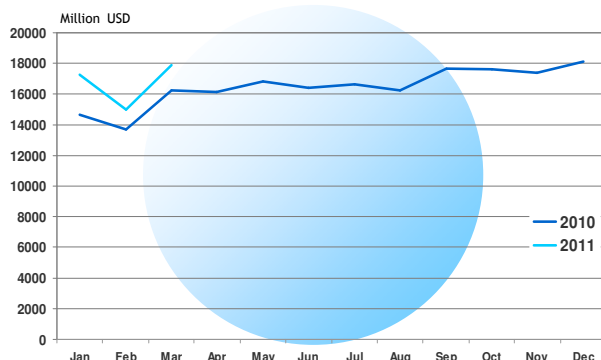


Highlights

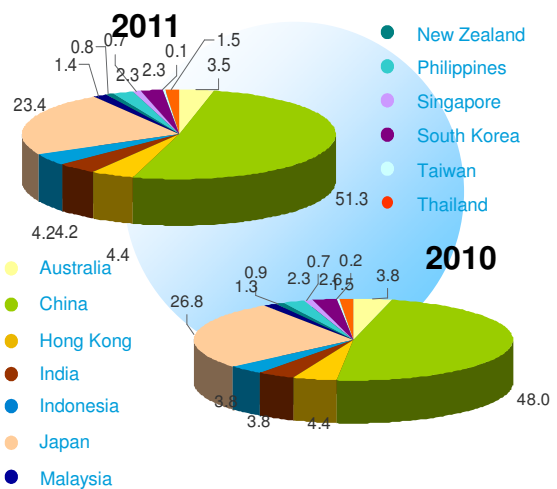
- Advertising market closes Q1 with a 12.4% growth, higher than the 10.1% growth in 2010
- Growth continues in spite of Japan's -1.5% decline
- China increases its share of the market

cancelled their scheduled spots (as it was considered disrespectful to advertise during a moment of great tragedy in Japan), they were still obligated to pay for these spots, containing a potentially huge decline in the advertising market. China furthered its spot as the leading market in the Asia Pacific—now representing a 51.3 percent share of the region. China's -12.1 percent decline in Telecommunications ad spend therefore fueled the -2.6 percent decline witnessed in Telecommunications for the region as a whole.

Market -- Advertising Expenditure Trend



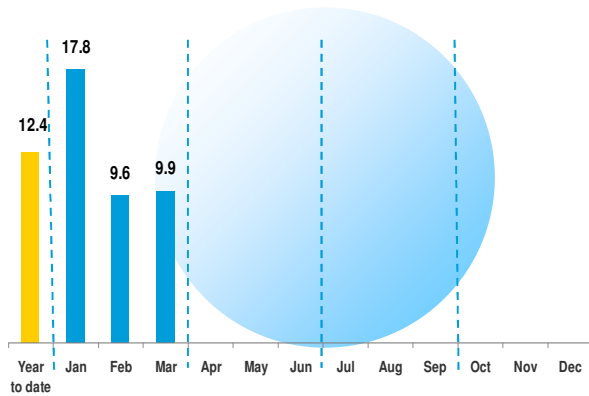
Countries -- % Share of Spend -- YTD



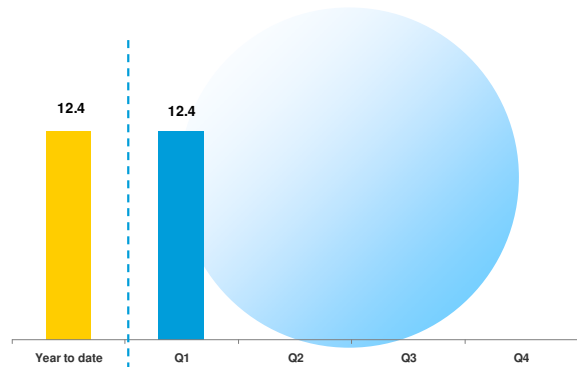
Note: media included in the region overview: Television, Newspapers, Magazines and Radio

ASIA PACIFIC

Market -- Year on year % change by month

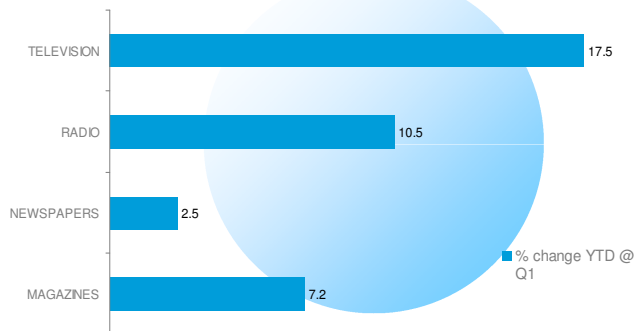


Market -- Year on year % change by quarter

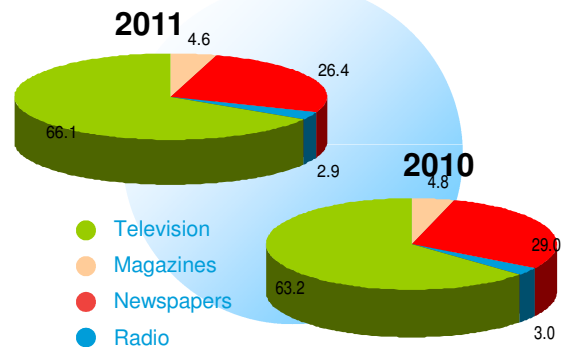


Media Types

Media -- % change YTD

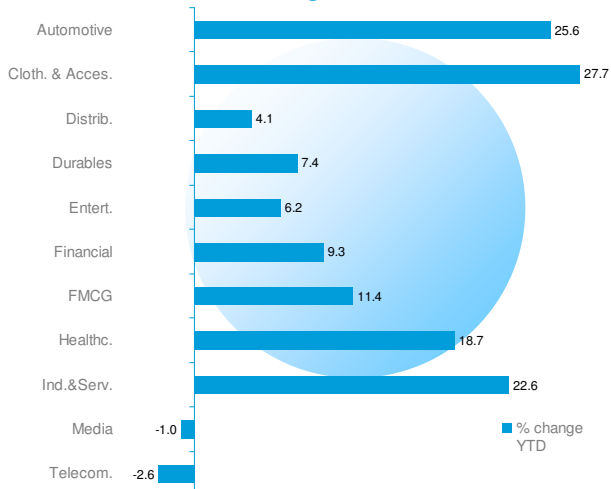


Media -- % Share of Spend -- YTD

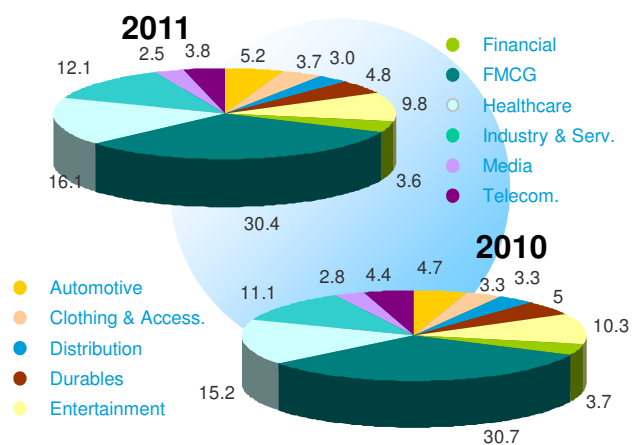


Macro-Sectors

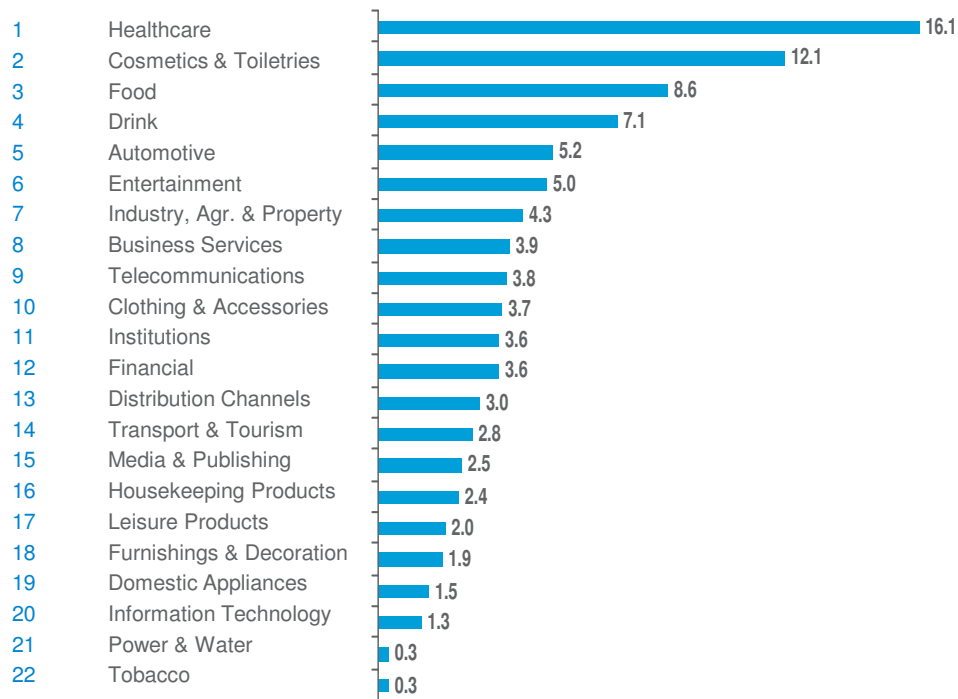
Sectors -- % change YTD



Sectors -- % Share of Spend -- YTD



Categories rank and % Share of Spend - Year to date



Europe

Region Overview

The European advertising market continued its path of contained growth during the first quarter of 2011, reporting a 2.9 percent increase in advertising spend when compared with Q1 2010. This may in part be due to the comparison with Q1 2010—when advertising for the winter Olympics was coming to a close and World Cup Football advertising was just starting up. After ending 2010 with an increase of +8.1 percent, the region's largest sector, FMCG, showed an important decline of -3.1 percent—which may have been fueled by the later date of the Easter holiday which traditionally fuels confectionary advertising. March 2011 showed a decline in ad spending of -1.2 percent when compared with the same month in

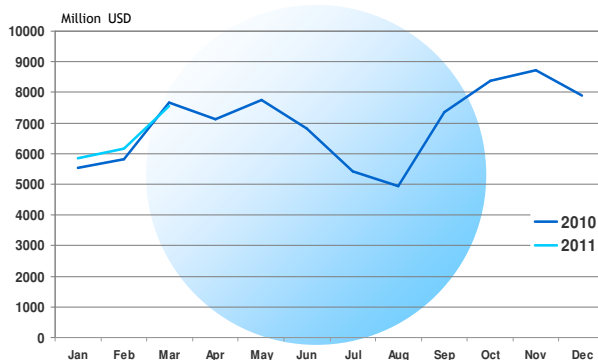


Highlights

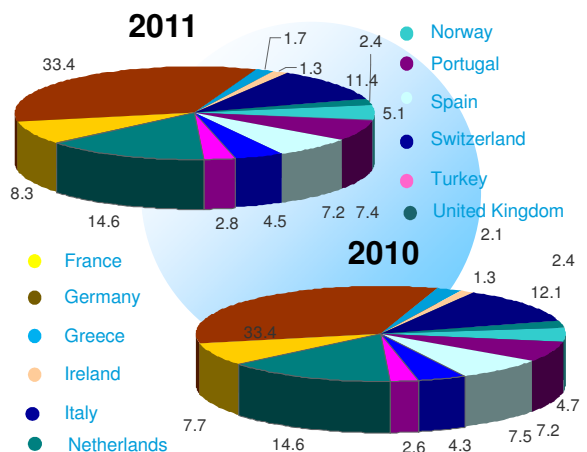
- European advertising closes Q1 with a slight growth of 2.9%
- FMCG showed an important decline of -3.1 percent—which may have been fueled by the later date of the Easter holiday
- Automotive sector showed the strongest percentage growth for the region at +10.8%

March 2010. Other sectors in decline include Financial (-1.6%) and Healthcare (-2.0%). The Automotive sector showed the strongest percentage growth for the region at +10.8 percent, representing a 10.3 percent share of spend for the region. Similar to its North American counterparts, Europe's Newspaper ad spend declined in the first quarter, down -1.6 percent with the same quarter in 2010.

Market -- Advertising Expenditure Trend



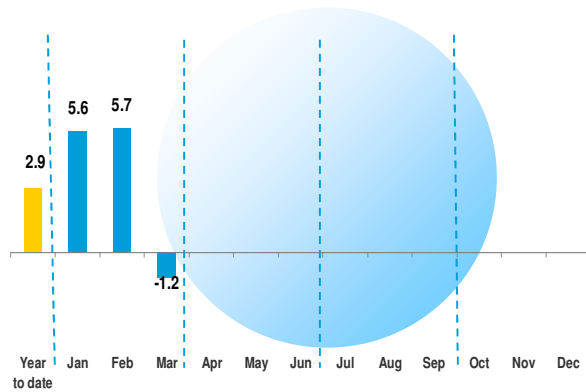
Countries -- % Share of Spend -- YTD



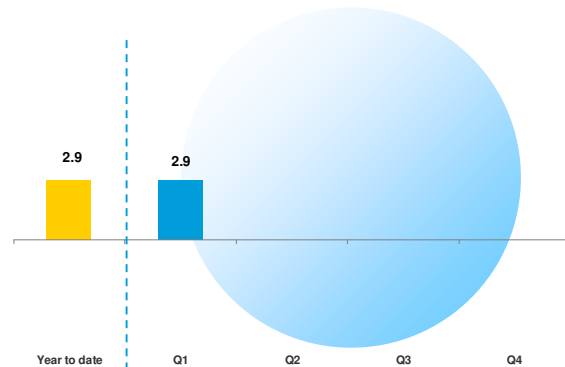
Note: media included in the region overview: Television, Newspapers, Magazines and Radio

EUROPE

Market -- Year on year % change by month

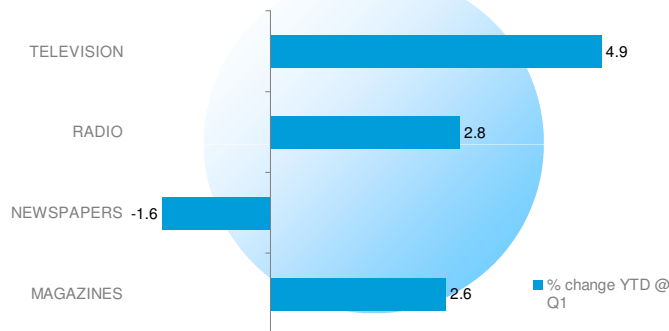


Market -- Year on year % change by quarter

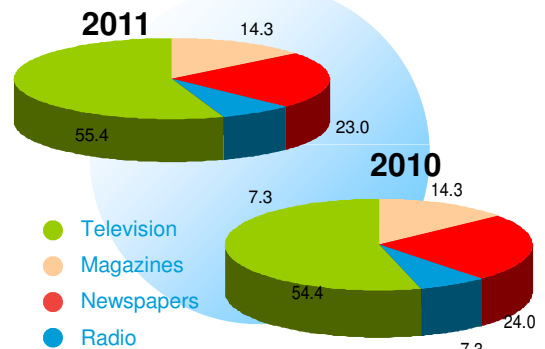


Media Types

Media -- % change YTD

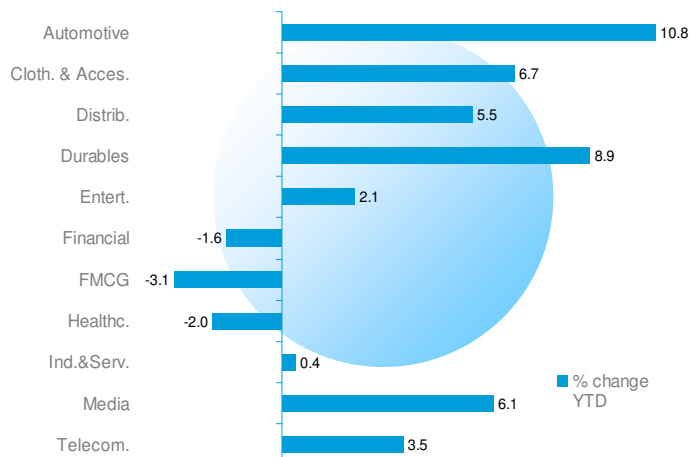


Media -- % Share of Spend -- YTD

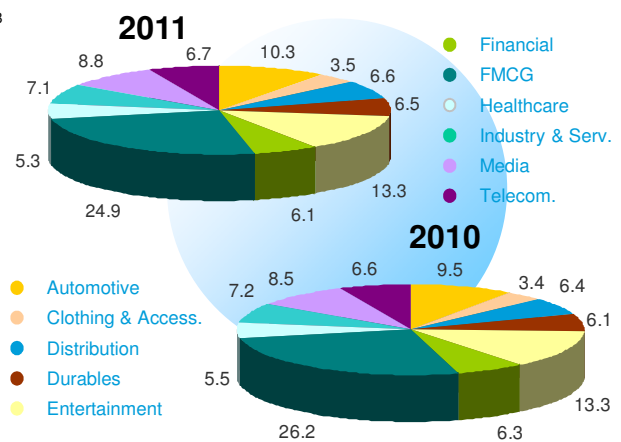


Macro-Sectors

Sectors -- % change YTD

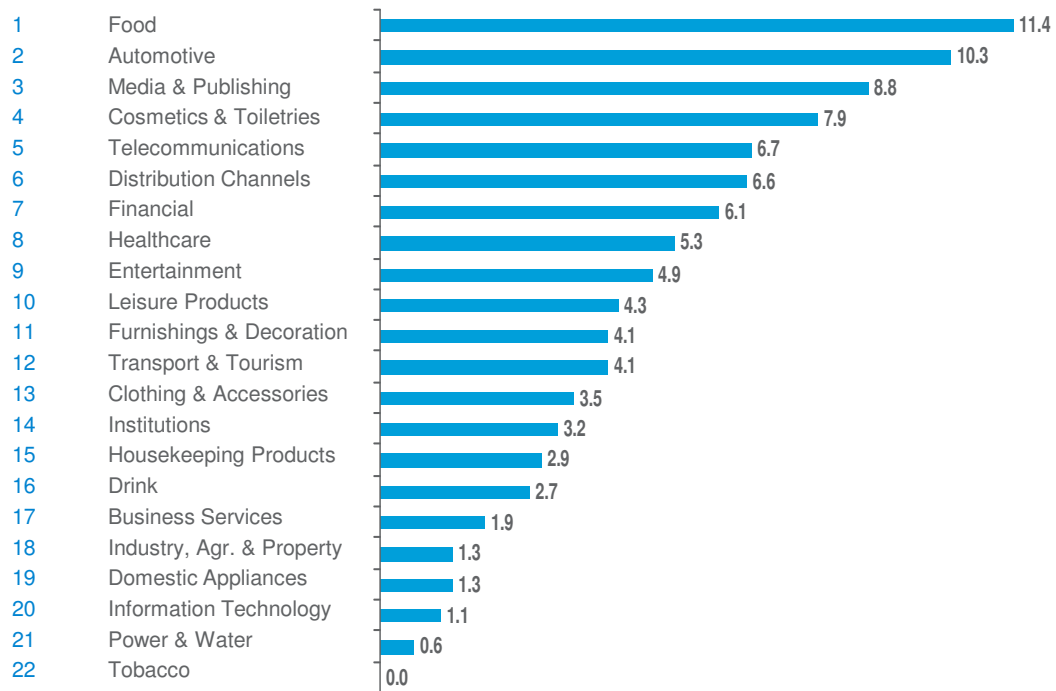


Sectors -- % Share of Spend -- YTD





Categories rank and % Share of Spend - Year to date



Latin America

Region Overview

After a strong performance in 2010 (+21.2%), the Latin American advertising market cooled slightly in the first quarter of 2011 to a +11.0 percent growth over Q1 2010. While this may in part be due to a high base of comparison with Q1 2010, the markets of Brazil (+11.3%) and certainly Mexico (0.4%) were quite tame in comparison to Argentina—which continued its double-digit growth to +37.0 percent. In fact, while Brazil still reigns as the market with the largest share of advertising spend in the region at 57.7 percent, Argentina gained



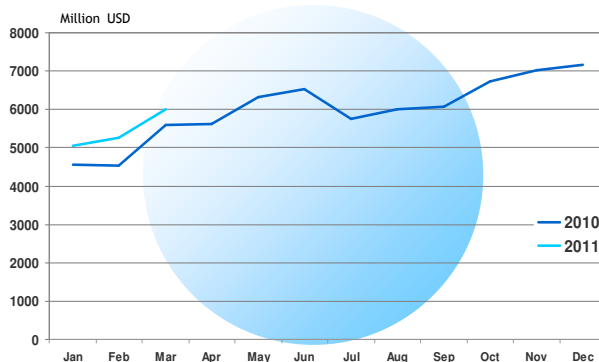
Highlights

- Latin America's ad market cools slightly (+11.0%) in Q1, compared with 2010 performance
- Consumer confidence declines in all three markets
- Argentina's ad spend increases +37.0% in Q1 2011

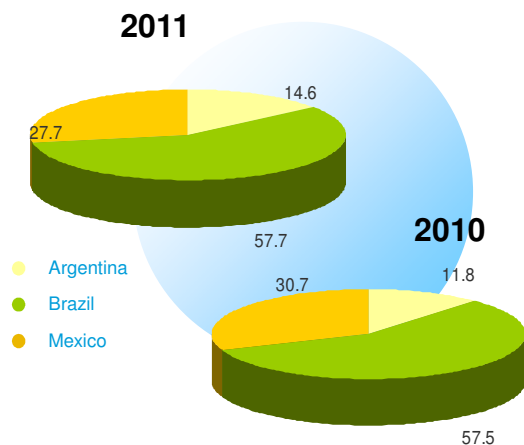
quite a bit of share during quarter—now representing a 14.6

percent share of the region from 11.8 percent in 2010. Consumer confidence in Argentina, Brazil, and Mexico all declined in the first quarter, with Brazil showing the largest decrease of 13 points to 95. All sectors showed positive trends during the first quarter of 2011. FMCG, with a 23.3 percent share of spend, spent +15.7 percent more on advertising during the first quarter.

Market -- Advertising Expenditure Trend



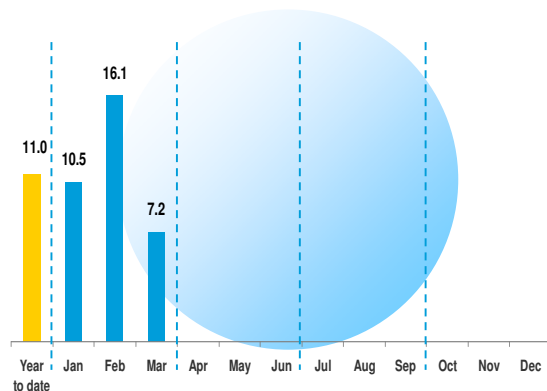
Countries -- % Share of Spend -- YTD



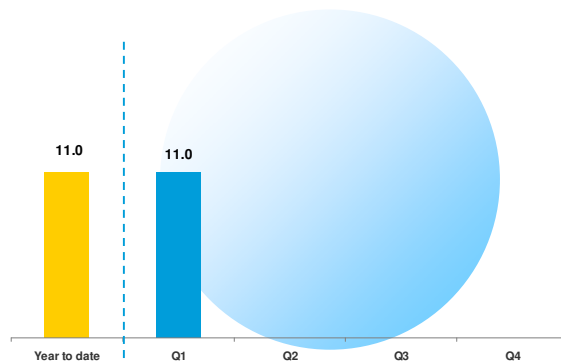
Note: media included in the region overview: Television, Newspapers, Magazines and Radio

LATIN AMERICA

Market -- Year on year % change by month

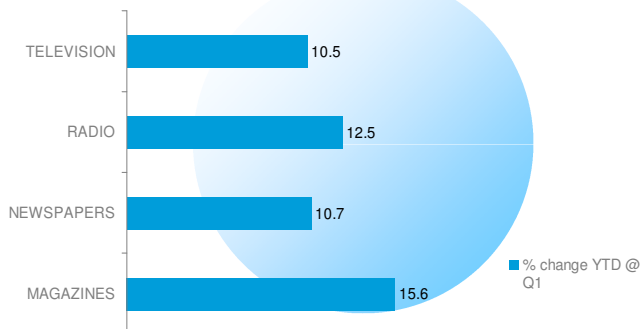


Market -- Year on year % change by quarter

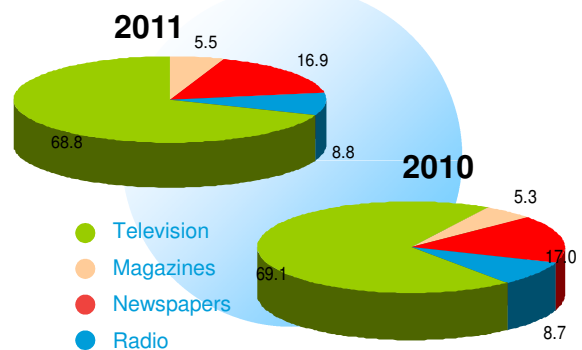


Media Types

Media -- % change YTD

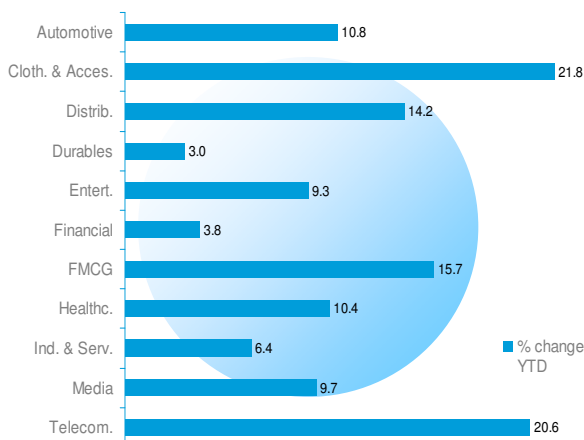


Media -- % Share of Spend -- YTD

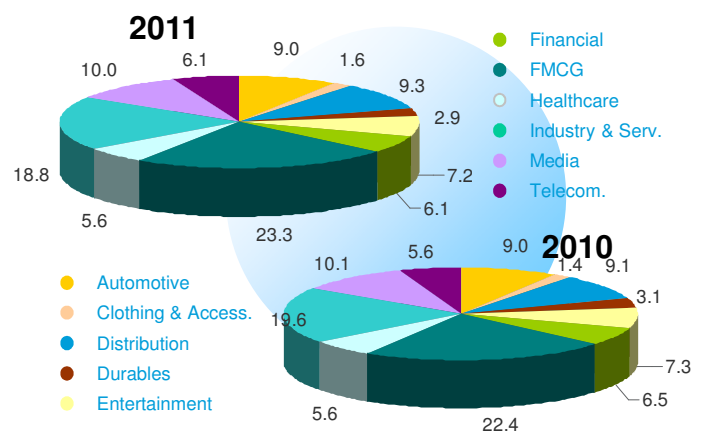


Macro-Sectors

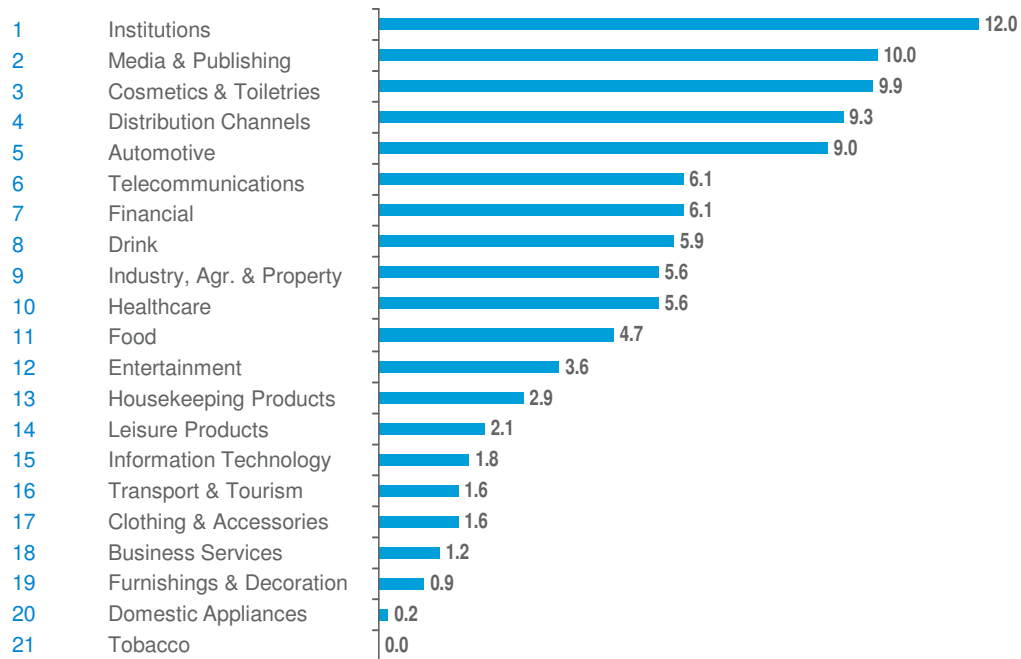
Sectors -- % change YTD



Sectors -- % Share of Spend -- YTD



Categories rank and % Share of Spend - Year to date



Middle East and Africa Region Overview

Although advertising markets such as Egypt were pummeled as a result of the Arab Spring in the first quarter, consumer confidence remained high within the region—as all markets within the region reported positive gains in consumer confidence from the fourth quarter of 2010. Egypt, well on the way to be the top advertising market in the Middle East at the end of 2010, reported a -51.3 percent decline in spending during the first quarter—yet with optimistic Egyptians showing a +29 point increase in confidence to 102 points. The low-



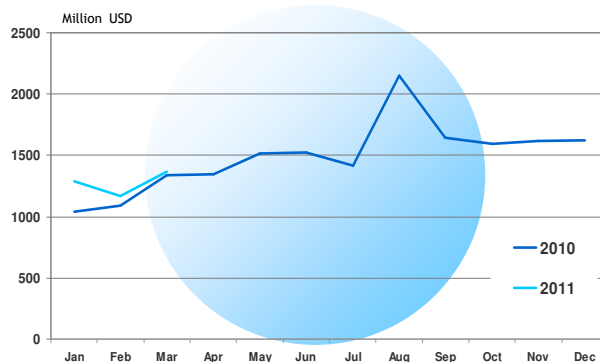
Highlights

- Advertising markets such as Egypt are pummeled after the Arab Spring
- Consumer confidence still grows in all Middle East markets measured
- Ad spend ends Q1 with a 10.4% increase for the region

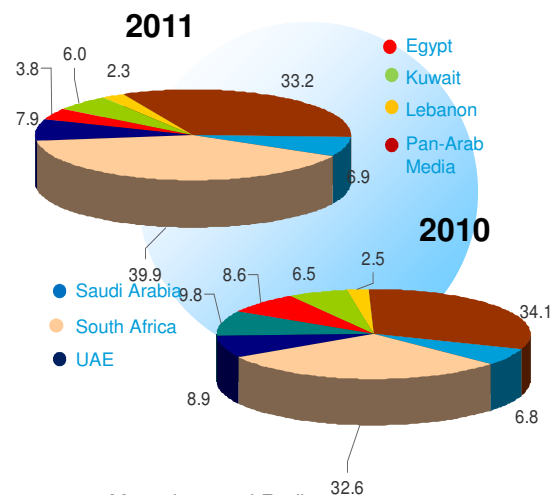
cost Radio showed the greatest percentage increase in ad spend

during the first quarter at 36.8 percent. Interestingly, Industry & Services advertising (which contains Government advertising) was down in the first quarter by -6.8 percent, and was the only sector in the region to report a decline. Media, which represents a 21.7 percent share of spend, showed a 38.9 percent growth in spend during the first quarter, and increased its share from 17.2 percent in 2010.

Market -- Advertising Expenditure Trend



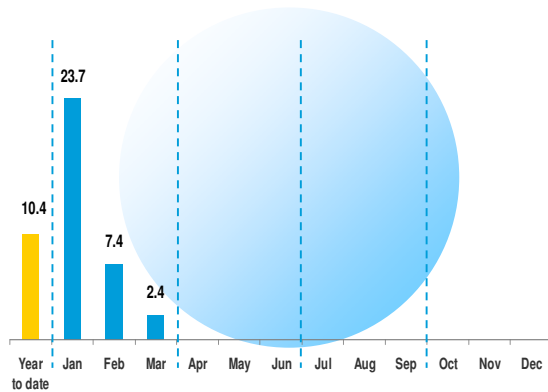
Countries -- % Share of Spend -- YTD



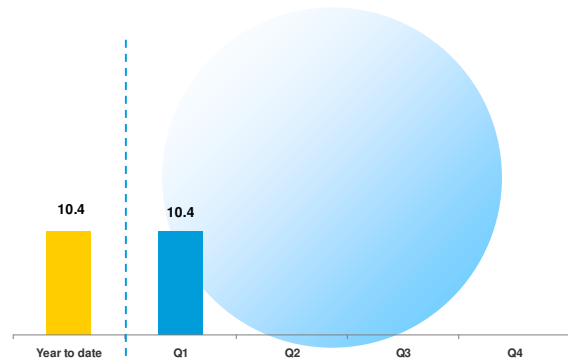
Note: media included in the region overview: Television, Newspapers, Magazines and Radio

MIDDLE EAST AND AFRICA

Market -- Year on year % change by month

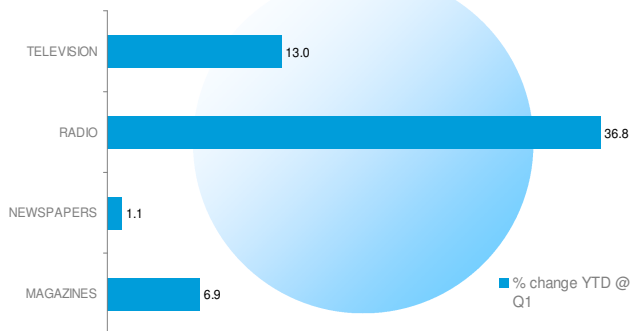


Market -- Year on year % change by quarter

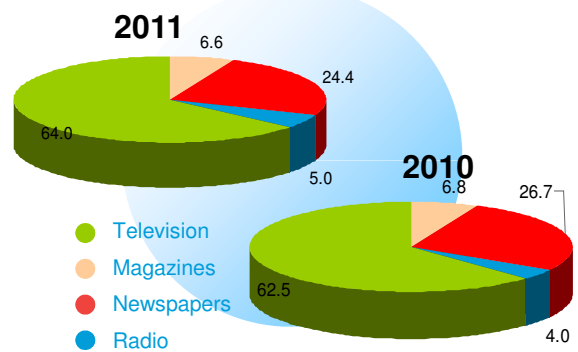


Media Types

Media -- % change YTD

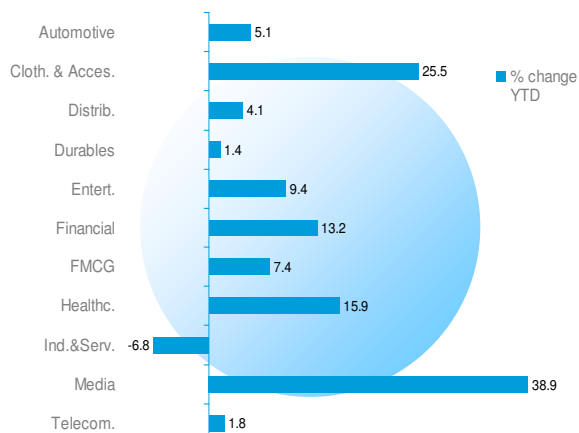


Media -- % Share of Spend -- YTD

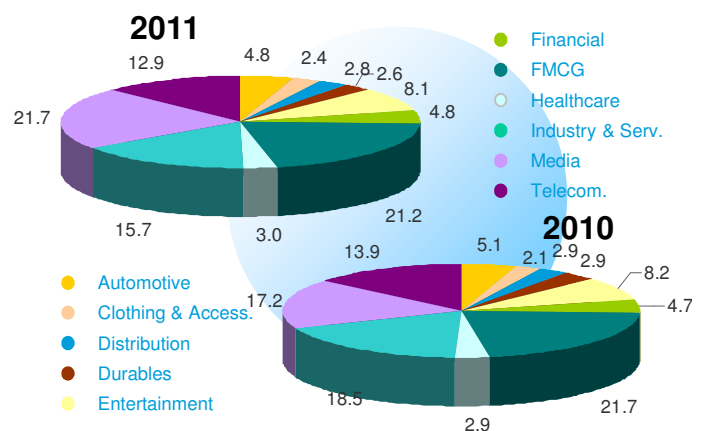


Macro-Sectors

Sectors -- % change YTD

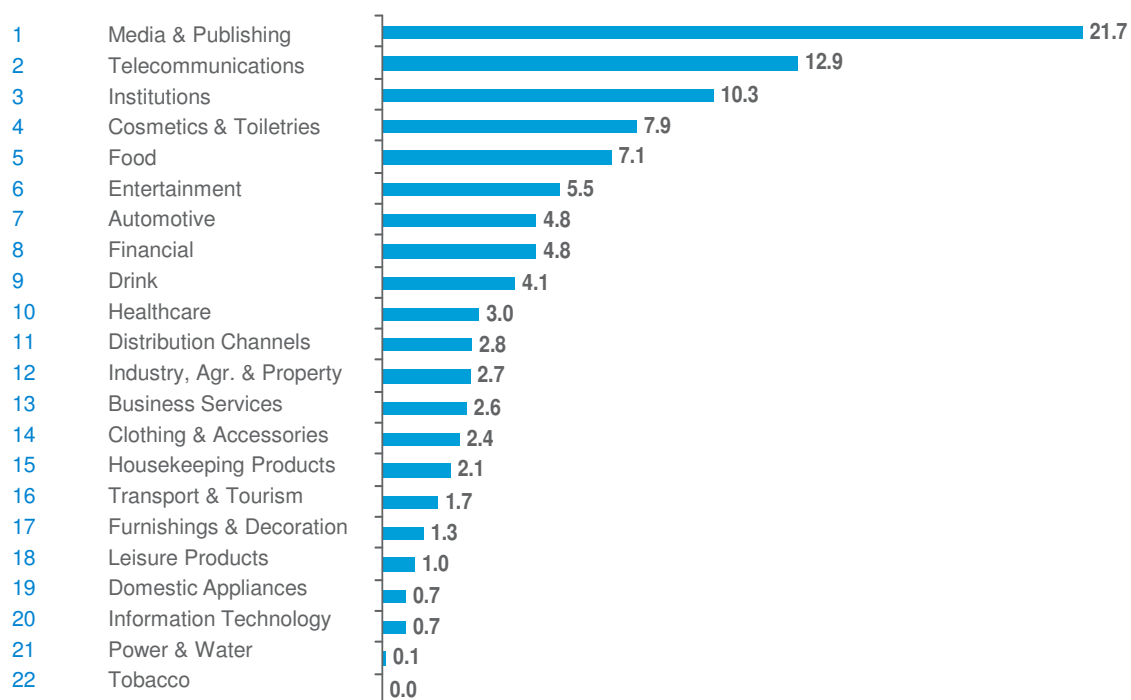


Sectors -- % Share of Spend -- YTD





Categories rank and % Share of Spend - Year to date





Methodology Notes



Methodology

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

Global AdView Pulse reports on advertising expenditure for Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, Greece, Hong Kong, India, 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
- India*
- 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 TAMIndia

** in association with Media Focus

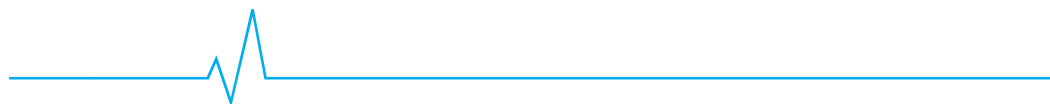
Methodology

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 April 2011 (website: www.imf.org).

The Nielsen Global Consumer Confidence Survey (source for the Nielsen Consumer Confidence Index), was conducted between March 23 and April 12, 2011 and polled approximately 28,000 consumers in 51 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, 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) 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, India, 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
North America							
Canada							
USA							
Asia Pacific							
Australia							
China							
Hong Kong							
India							
Indonesia							
Japan							
Malaysia							
New Zealand							
Philippines							
Singapore							
South Korea							
Taiwan							
Thailand							
Europe							
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. Cinema data was not complete at the time of publication and is therefore excluded. As a modification in Internet methodology took place mid-2010, some caution should be used when comparing Q1 2011 Internet to Q1 2010
- **Greece:** Nielsen Global AdView estimated weighting factors are applied.
- **Ireland:** figures are estimated net at source.
- **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.
- **The Netherlands:** Nielsen Global AdView estimated weighting factors are applied.
- **Saudi Arabia:** spend information for Internet is not available prior to 2008 therefore the trends for the previous years are not reported. The sharp decline in Radio is in part due to the limited number of monitored channels.

Notes to accompany data

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

- **Singapore:** spend information for Internet is not available prior to 2008 therefore the trends for the previous years are not reported. The drop in Internet spend is in part due to reduced coverage since June 2010.
- **South Africa:** the share of spend and the trend of the macro-sector Media are influenced by the high incidence of 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.
- **Thailand:** spend information for Internet is not available prior to 2008 therefore the trends for the previous years are not reported.
- **Turkey:** Nielsen Global AdView estimated weighting factors are applied. In addition to organic growth, the increase in Outdoor is also due to increased coverage.
- **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 information excluded from this quarter report as it was not complete at the time of publication.



About Nielsen Global AdView



Contact

E-mail : 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.