



nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™

THE TOP MEDIA ADVERTISERS

JANUARY TO DECEMBER 2013



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AUSTRALIA'S TOP MEDIA ADVERTISERS – REVIEW OF 2013

As consumers expand their engagement across a myriad of different sized screens and media platforms for their entertainment, information seeking, commercial and communications activities; opportunities to reach consumers on their smartphone, tablet or via rich, video formats continue to emerge. Advertisers have expanded their footprint and consumer touch-points, evident in the shifts in advertising spend - a reflection of the growing importance multi-platform strategies to brand marketers.

Looking at the latest Nielsen advertiser figures for the 12 months ending December 2013, overall ad spend increased 0.7 percent. This is a positive end to the year considering the market was down 2.5 percent at the end of June 2013.

The top 10 advertiser groups in Australian spent an estimated \$1.2 billion in 2013. The categories which were most representative in this elite list of top 10 advertiser groups were a combination of retail, motor vehicle, government, FMCG and communication categories. Seven of the top 10 advertisers (which combined represents over 70 percent of all main media spending measured in Australia) increased their advertising investment, however, interesting to note, the number one advertiser in the country, Wesfarmers, recorded a slight decline of -2.2 percent.



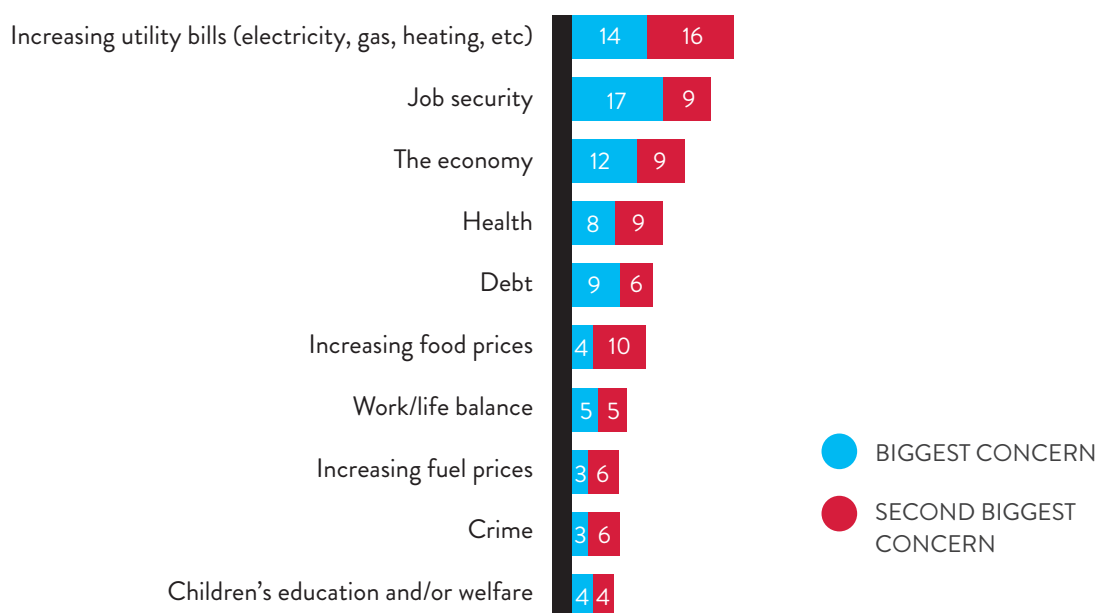
MONIQUE PERRY
HEAD OF MEDIA
INDUSTRY GROUP,
AUSTRALIA

Retail, the highest spending category, spent \$2.1 billion on advertising in 2013, an increase of 0.7 percent compared with the previous year, and representing more than 22 cents of every advertising dollar invested in main media. Motor Vehicles recorded the second highest spend, despite a slight decrease of almost one percent versus 2012.

Both metro and regional TV experienced uplift in 2013, compared to the previous year, and online and cinema recorded notable year-on-year growth. This trend is a sign of things to come as advertisers adjust their strategies to reach consumers with increasingly fragmented media consumption behaviour, and maximise the return on every dollar they spend.

Looking forward, early indications based on positive momentum in the second half of 2013 and a strong first couple of months of 2014, point to a case for optimism in advertising spend for the foreseeable future. Stable consumer confidence, low interest rates and low exchange rates are also expected to support the advertising sector and position it for growth. These factors, coupled with additional growth likely to come from key sporting events, including the Football World Cup in Brazil, and the Commonwealth Games in Scotland, certainly place the industry in a position to expect upward trends in the year ahead.

TOP 10 MAJOR CONCERNS OVER THE NEXT 6 MONTHS



Source: Nielsen Global Consumer Confidence Survey, Q4 2013

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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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