

# Global AdView Pulse

Your connection to  
global advertising trends  
Quarter 2 2008

nielsen  
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## Media Types

The first half of 2008 sees Television as the only medium to gather more advertising than in the same period of last year.

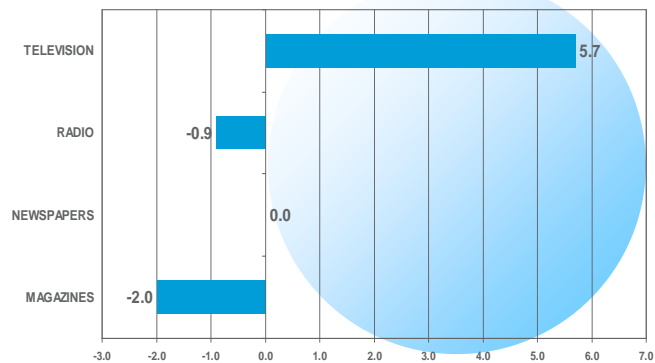
With a growth of almost 6% , and a share of spend of 60%, this medium is driving the growth of the whole market.

Newspapers, the second medium in terms of share of spend, are stable. This is the result of the positive trend in Asia Pacific, balanced down from the decline in both Europe and North America.

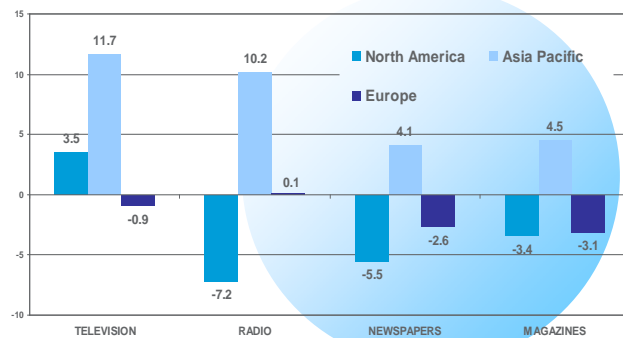
Magazines show a similar regional picture to Newspapers, however in this case the increase registered in Asia Pacific is not enough to balance the decline in the other two regions. As a result the global spend on the media is 2% less than it was in the first six months of 2007.

Radio, representing the remaining 5% of the global spend on the four major media types, is strongly declining in North America, while is stable in Europe and expanding in Asia Pacific. However once again the negative trend of one region is not balanced by the performances in the other two and the global result is a decrease of the spend of 1%.

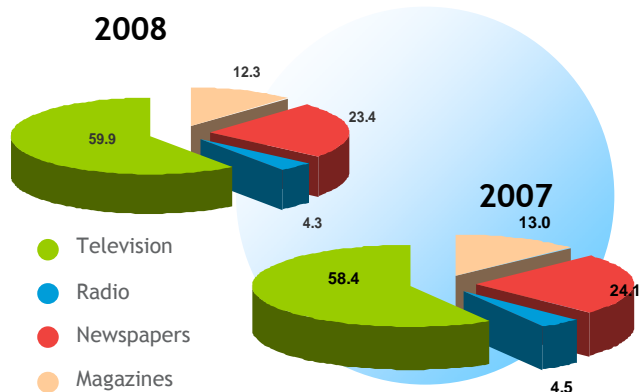
Media -- % change year to date



Media by Region -- % change year to date



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



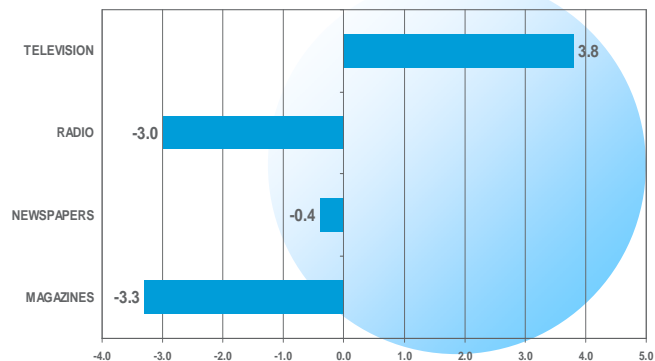
## Media Types

The second quarter of the year shows a very similar picture to the first half of the year, though the growth of the market seems to slow down overall. As often happens when companies are facing difficult times, they tend to prefer Television to the other media available. This is reflected by the global trends which see Television as the only growing medium in April to June 2008 versus the same three months of 2007. However at a regional level, Europe seems to be an exception and is the only market where Television has gathered 4.1% less advertising than in Q2 2007. This trend is mostly due to the difficulties the Spanish market is facing, together with a negative trend in Turkey and a flat result in the United Kingdom.

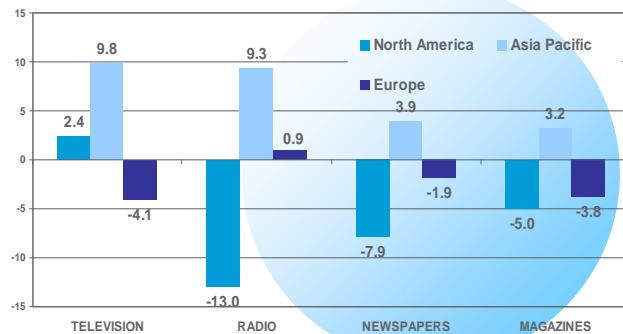
Print is declining overall, however as observed for the half year trends, Newspapers are fairly flat (-0.4%) since the advertising increase registered in Asia Pacific has been balancing the decline showed in North America and Europe (-7.9% and -1.9% respectively). Magazines on the other hand showed a more accentuated decline (-3.3%) despite the good results showed in Asia Pacific.

Radio is also showing a negative sign overall (-3.0%), though mainly driven by the decrease in the advertising on this media in the North American region. In Europe this medium has in fact gathered slightly more advertising than it did in April to June 2007, while in Asia Pacific it shows a more decisive growth of + 9.3%.

Media -- % change last quarter



Media by Region -- % change by quarter





## About Nielsen Global AdView



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### Nielsen Global AdView

Global AdView provides international advertising services. 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.

### Nielsen Media Research

Nielsen Media Research, one of the major businesses of The Nielsen Company, is active in 40 markets offering television, radio and outdoor audience measurement, print readership, advertising information services and customized media research.

Nielsen Media Research 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.

### The Nielsen Company

The Nielsen Company is a global information and media company with leading market positions in marketing information (ACNielsen), media information (Nielsen Media Research), online intelligence (NetRatings and BuzzMetrics), mobile measurement, trade shows and business publications (Billboard, The Hollywood Reporter, Adweek). The privately held company is active in more than 100 countries, with headquarters in New York, USA. For more information, please visit, [www.nielsen.com](http://www.nielsen.com).