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# DEVELOPMENT OF NEW ADVERTISING TECHNIQUES ECONOMICAL FACTORS

## 1. Evolution of the advertising investments in the European mass media

**January 2002**

***Carat Crystal***

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# Ad spendings - Introduction on the methodology

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- **Values**

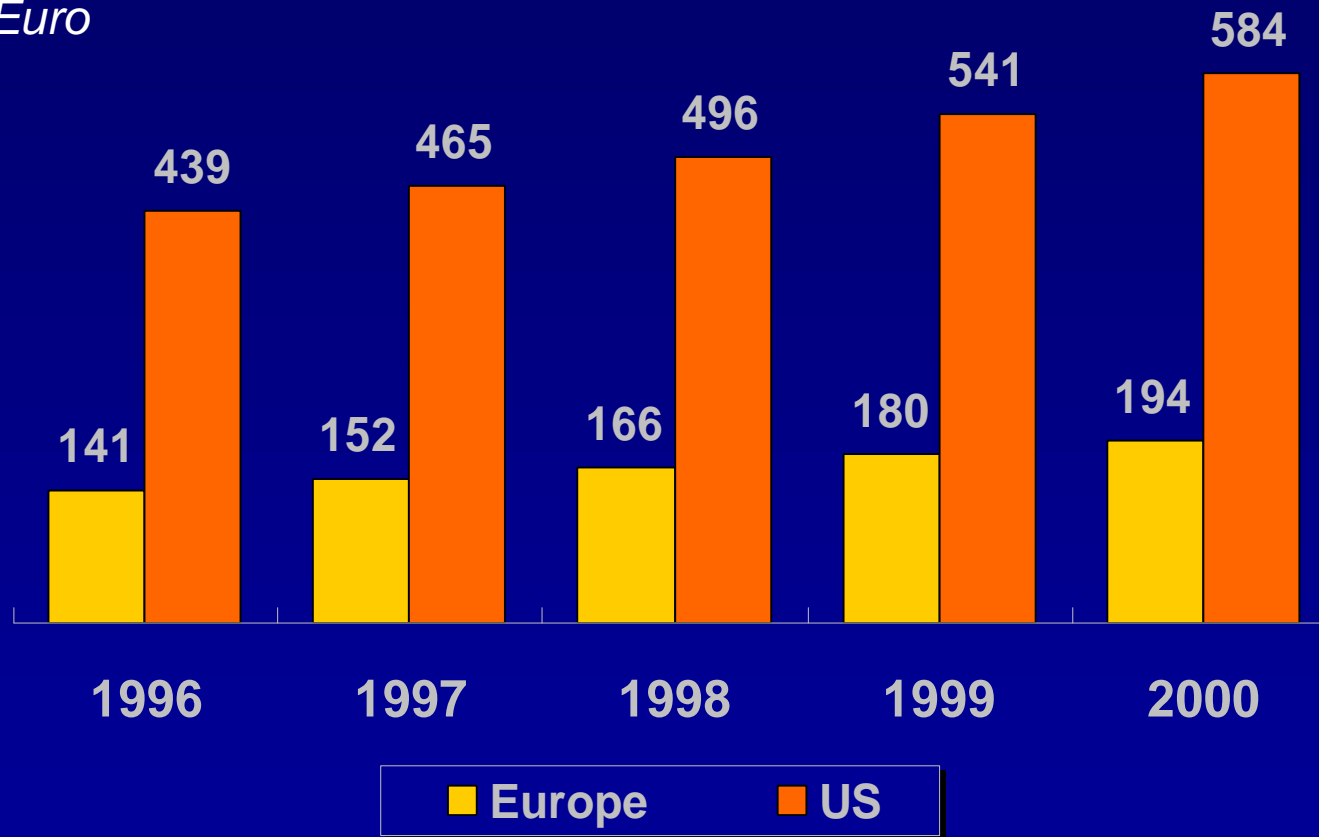
- Advertising space value definition : based on gross tariffs only.
- Stable method accross all markets and past observations
  - With some "sub-variances"
- Do not take negociations and rebates into account

- **Media**

- The media observed are : TV, Radio, Cinema, Newspapers, Magazines and Outdoor
  - Internet and the Free Press are rarely included in official monitors
    - So the available data were not integrated in the following tables
  - Direct Marketing actions and Folders are not included as well.
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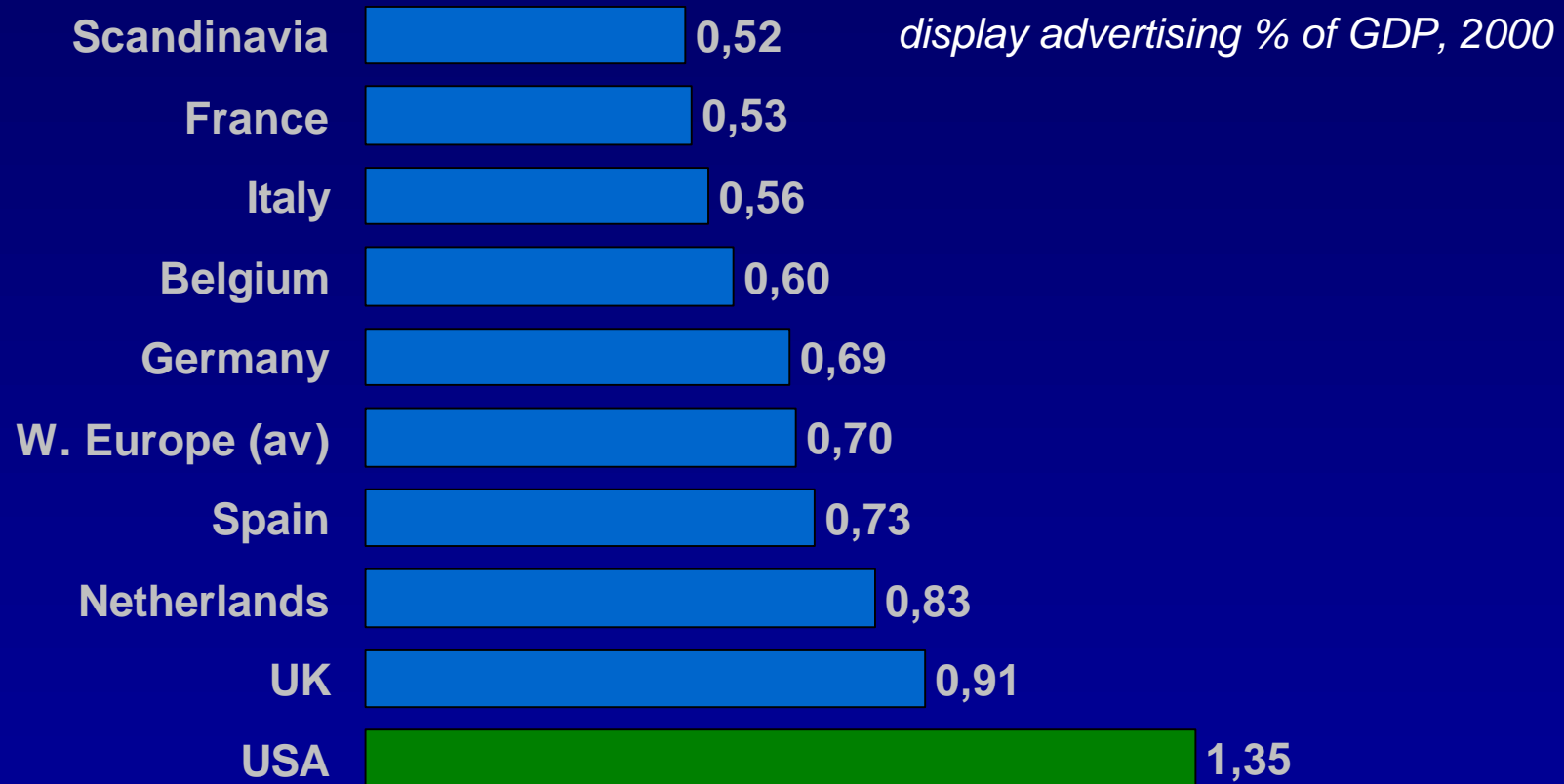
# Ad spending per capita - Europe (15) /US

*In Euro*



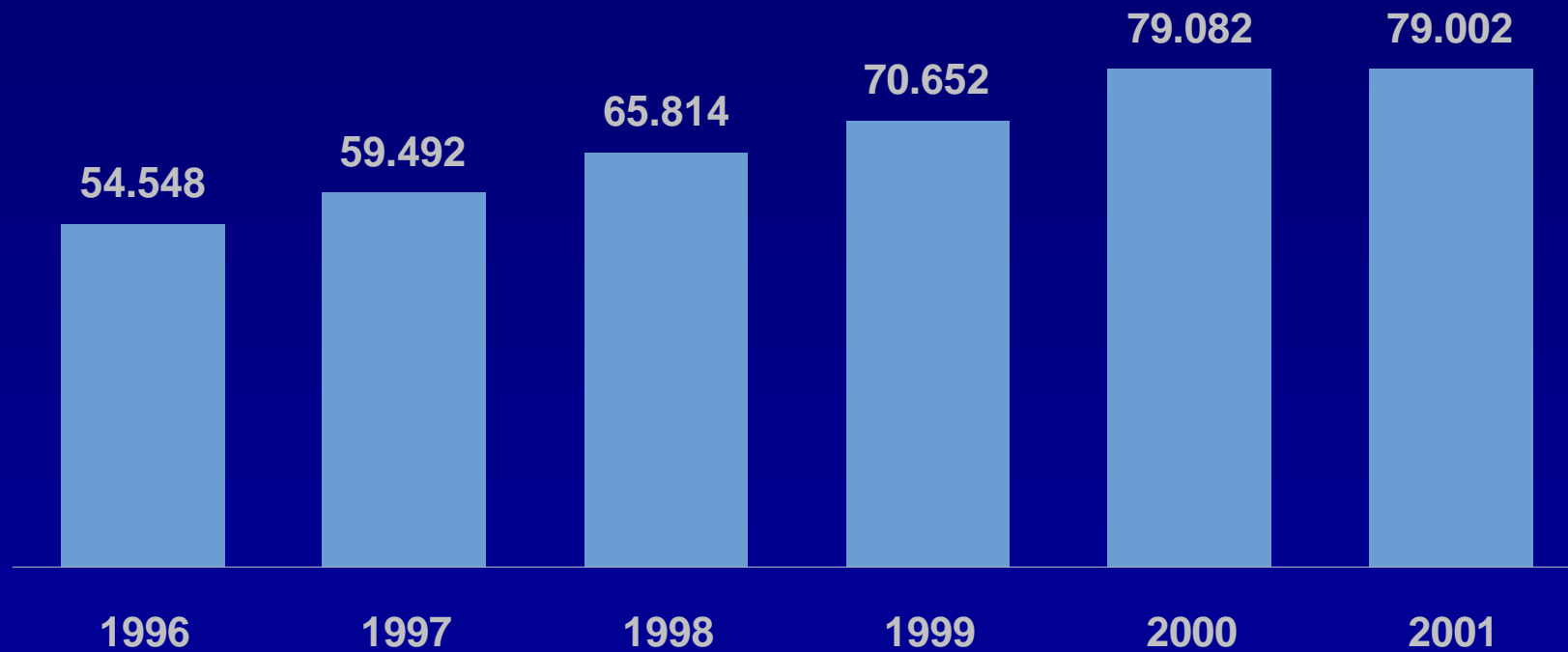
Source : Carat network

# Europe still invests less in mass media advertising than the US market

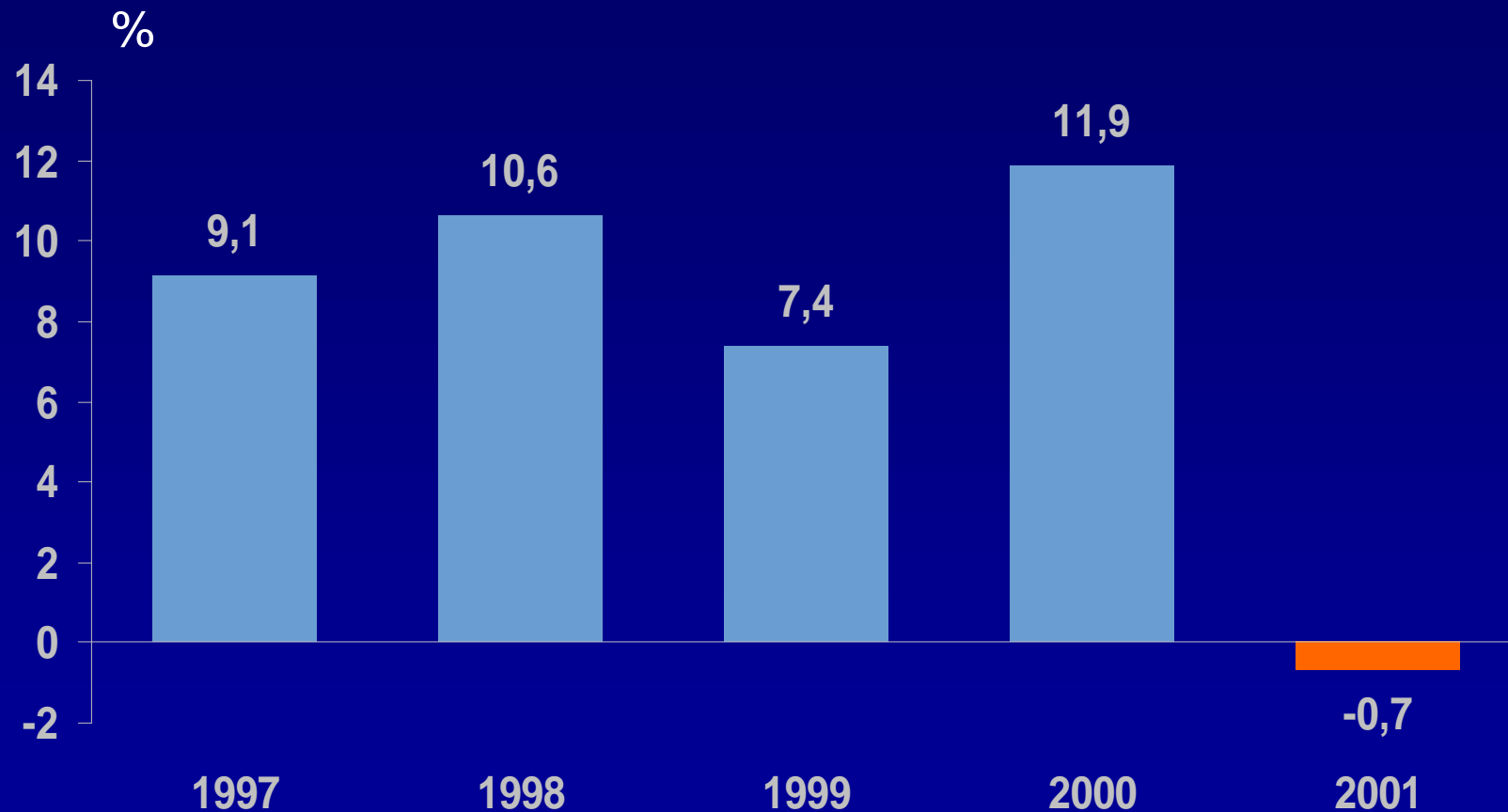


# Total Advertising Expenditure - in Euro M (18 EEE european countries)

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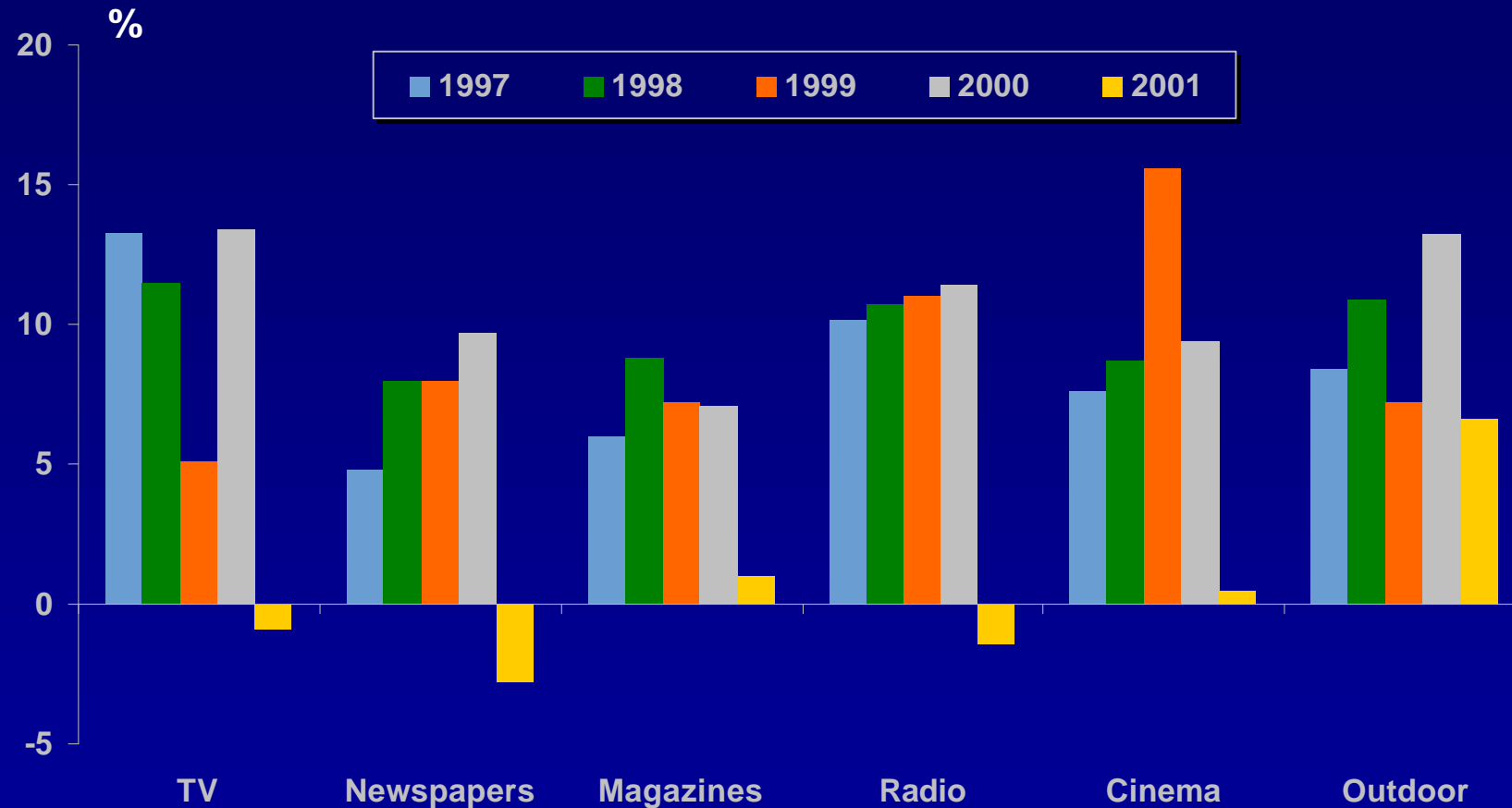
# Total Advertising Expenditure Year on Year Growth (18 EEE)



Last Update : September 2001

# Total Advertising Expenditure

## Y on Y Growth by Medium - 18 EEE markets



Last Update : September 2001

# European Ad Spending Evolution

## Selection of the 15 EU markets

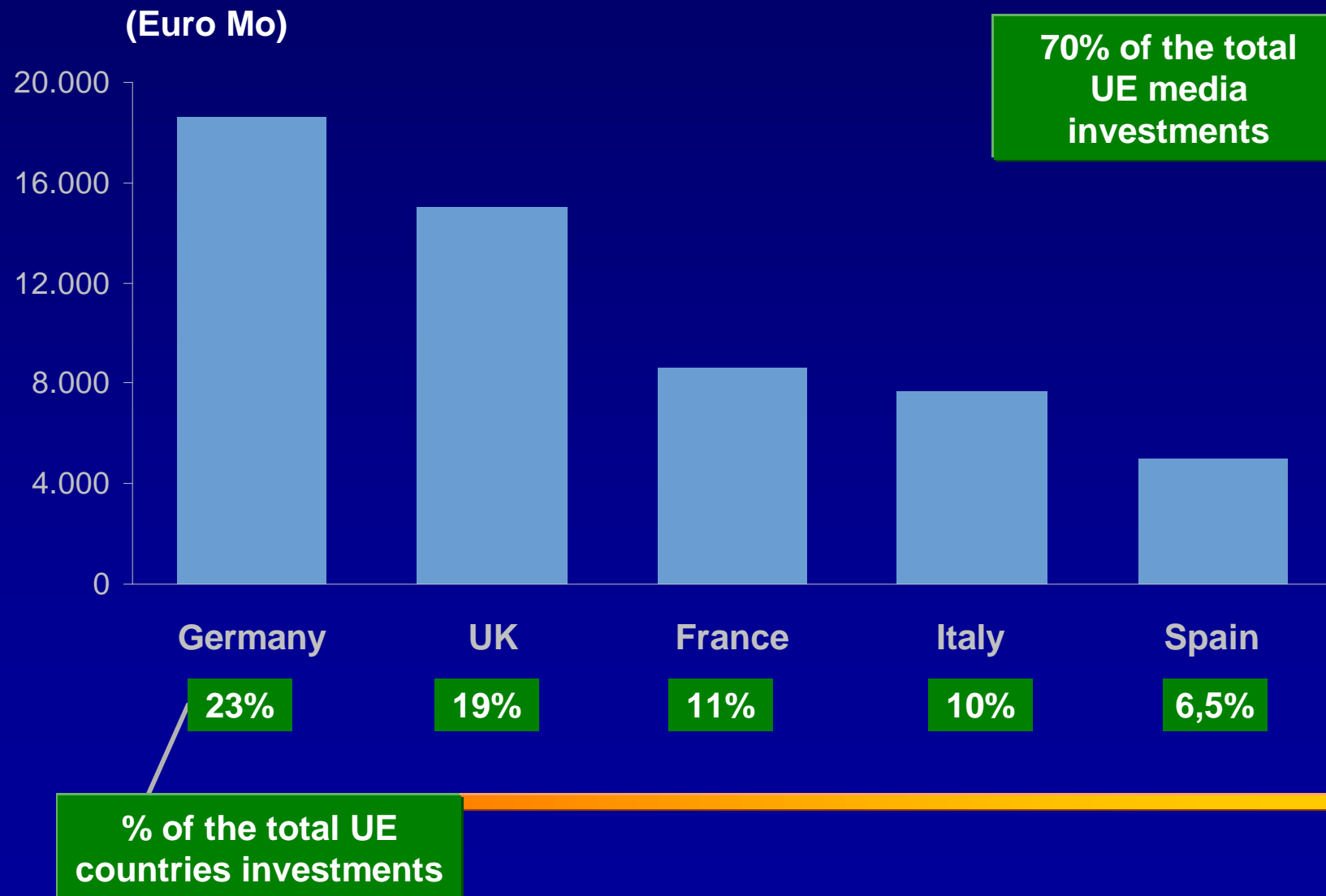
All figures in Euro Mo at 2001 average exchange rate

	2000	2001	2002	01 vs 00	02 vs 01
Austria	1.681	1.821	1.914	8,3	5,1
Portugal	1.100	1.168	1.234	6,2	5,6
Belgium	1.809	1.844	1.884	1,9	2,2
Italy	7.676	7.814	8.049	1,8	3,0
Ireland	770	781	781	1,4	0,0
Netherlands	3.862	3.862	3.914	0,0	1,4
Greece	788	780	796	-1,0	2,0
Denmark	787	779	787	-1,0	1,0
Germany	18.590	18.320	19.040	-1,5	3,9
France	8.584	8.424	8.550	-1,9	1,50
UK	15.002	14.582	14.950	-2,8	2,5
Spain	5.025	4.774	4.870	-5,0	2,0
Finland	871	827	803	-5,0	-3,0
Sweden	1.580	1.390	1.418	-12,0	2,0
Lux	n.a.	n.a.	n.a.		
<b>Total</b>	<b>68.125</b>	<b>67.166</b>	<b>68.990</b>	<b>-1,4</b>	<b>2,7</b>

Source: Carat network

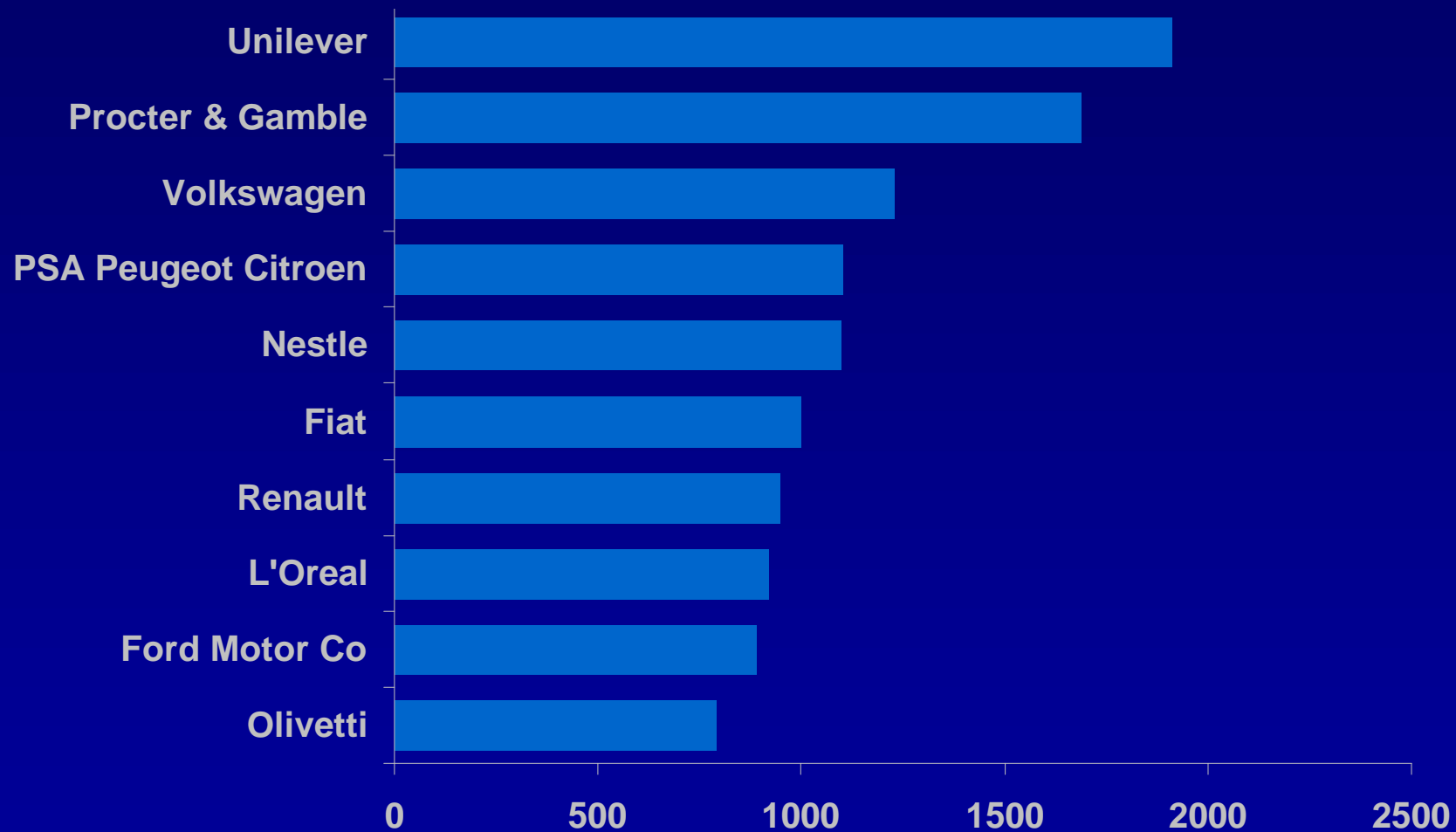


# Advertising Expenditure - Top 5 European Markets - 2000



# Top 10 Advertisers - 2000

## Total Adspend – M Euros

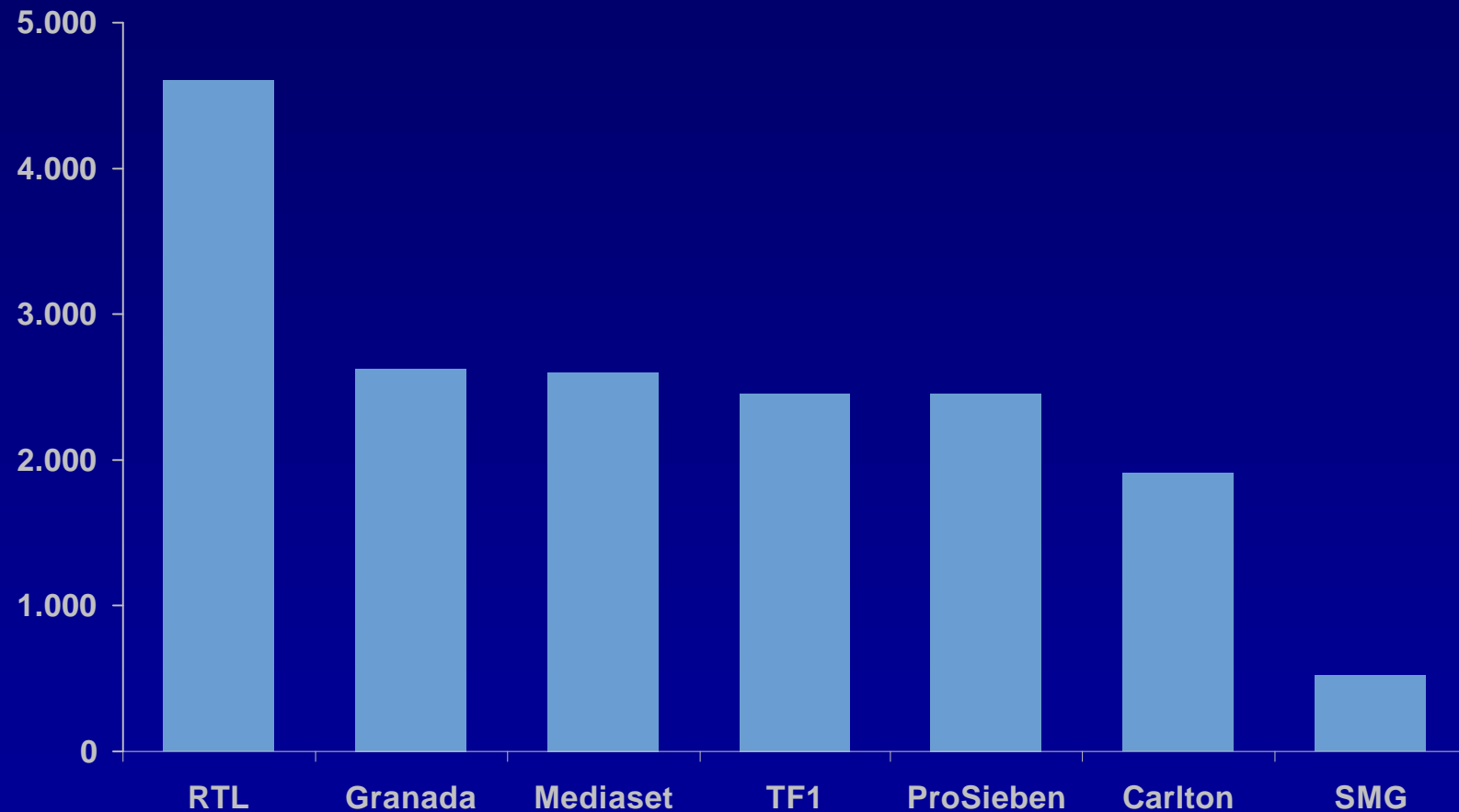


Sources: Adage Global

Last Update: November 2001

# Key Media Owners - TV 2000

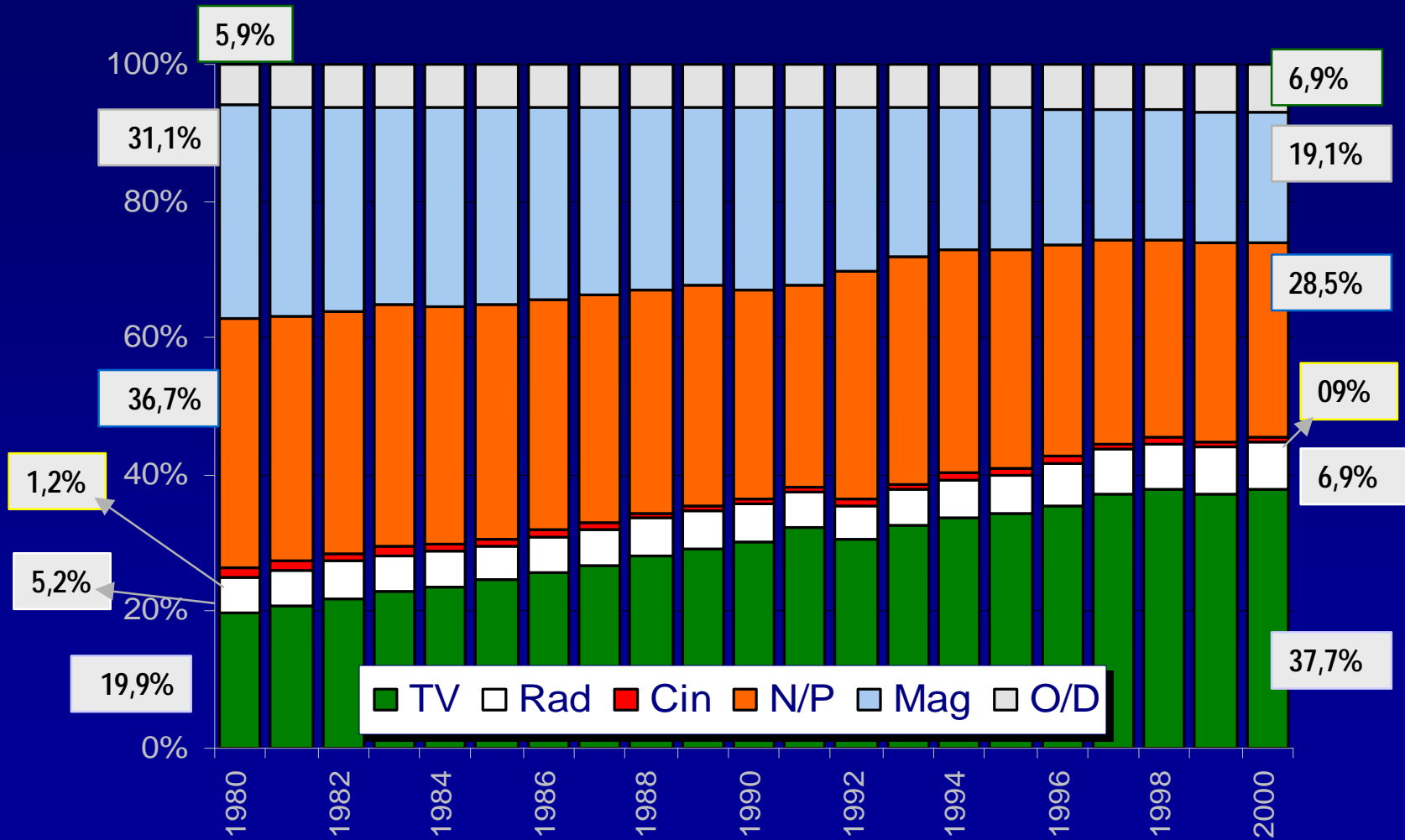
## Sales in Euro M



Sources: ABN AMRO estimates

Last Update: January 2001

# European market share growth by medium (18 EEE)



Source : Carat network