



Media release

The Nielsen Company

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Upbeat advertising market in 2010 delivers a return to solid growth across Australia's media

Australia's Top Advertisers unleashed major advertising campaigns led by the nation's major Retail Groups

Sydney, 30 March 2011: The latest Top Media Advertisers report for calendar year 2010 from The Nielsen Company has delivered a positive outlook on Australia's advertising industry, with a strong rebound in ad spending to an estimated \$10 billion plus.

"As the advertising recovery gained momentum in the first half of 2010, there were substantial year on year increases in activity particularly among the major spending categories that were most impacted by the advertising cutbacks of 2009; including Motor Vehicles (+14%), Finance (+13%), Real estate (+19%), Communications (+12%) and Insurance (+12.8%)" comments Peter Cornelius, Managing Director, Australia Media at Nielsen. *(See Chart: 1).*

The nation's top Advertisers list was brimming with many big household names, evidenced by the substantial increases YOY among several of the Top 10, led by Australia's top ranked Retail Group, Wesfarmers Limited (\$239M +15%), 2nd ranked Woolworths Limited (\$166M +18%) and Harvey Norman Holdings (\$145M +7%). Others showing extremely positive growth were 13th ranked McDonalds Family Restaurants (\$75M +30%), QANTAS Airways Ltd (\$65M +25%) and Vodafone Hutchison Australia (\$64M +26%). *(See Chart: 2)*

"The Nielsen report contained good news for all 10 main media sectors with most recovering from the dip in advertising revenues during 2009 and building on a stronger revenue base for the year ahead. Overall, advertising spending in 2010 by our estimates increased by almost 10% over 2009. In the case of advertising performances across Television in the major Metropolitan and Regional markets, estimated spending lifted to almost \$4 billion; representing nearly 40% of all Australian media spending" Cornelius added. *(See Chart: 3)*

Will the advertising recovery be sustained throughout 2011?

"The levels of growth across most of 2010 have certainly slowed in 2011; albeit reflecting that media activity has returned to business as usual pre GFC trends. Recent media reports indicate patchy results across some media, possibly due to the recent devastating floods and cyclone damage, consumer caution over escalating food and energy costs, and concerns over the impact of the Government's proposed carbon trading levy.

However, our dollar is currently at parity to the US dollar, our commodity export markets have maintained positive economic performances, particularly China and India. All these factors considered, our advertising sector should still maintain solid growth over 2010.” he summarised.

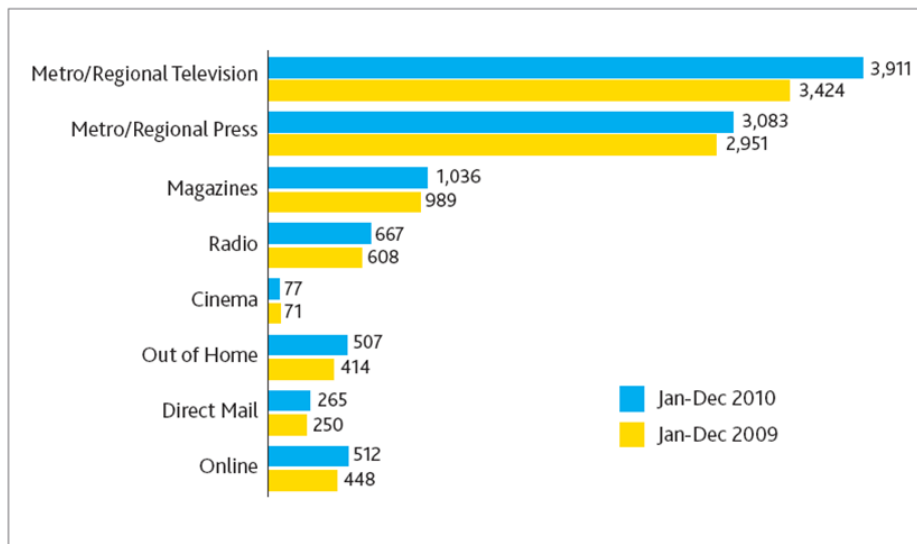
Chart 1: The Top 10 Advertising Categories in Australia – Source: The Nielsen Company

'10 Pos	'09 Pos	The Top Advertising Categories	All Media	
			\$M	YoY%
1	1	Retail	2,179.2	6.6
2	2	Motor Vehicles	1,064.2	14.0
3	3	Entertainment & Leisure	756.0	2.1
4	4	Finance	637.3	13.2
5	6	Real Estate	572.2	19.3
6	5	Travel/Accommodation	512.9	2.7
7	7	Food	418.9	4.8
8	8	Communications	337.3	12.2
9	10	Insurance	282.1	12.8
10	9	Media	267.5	-1.1

Chart 2: The Top 10 Advertisers in Australia for 2010 & YOY (\$M). Source: The Nielsen Company

'10 Pos	'09 Pos	Advertiser Groups/ Advertisers	All Media	
			\$M	YoY%
1	1	Wesfarmers Limited	238.9	15.0
2	2	Woolworths Limited	166.2	17.7
3	3	Harvey Norman Holdings Ltd	145.2	7.4
4	5	Nestle Australia/L'Oreal	121.3	8.5
5	6	Telstra Corp Limited	120.4	20.9
6	4	Government Commonwealth	114.2	-11.6
7	7	Government Victoria	103.9	11.7
8	13	Toyota Motor Corporation Australia	82.1	26.3
9	12	Government NSW	81.3	19.9
10	10	SingTel Group	81.0	12.1

Chart 3: Est. Ad Spend Trends in Main Media in 2010 & YOY (\$M). Source: The Nielsen Company



Source: Nielsen - Top Media Advertisers Report calendar year 2010

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About the Top Media Advertisers Report 2010

The complete report covers main media advertising estimates for the period Jan to Dec 2010 vs. Jan to Dec 2009 and summarises:

- Top 25 Advertiser Groups/Advertisers (and Top 25 Advertisers (excluding Advertiser Groups))
- Top Advertiser Categories and Top Advertisers/Advertiser Groups by allocation of spend across the following main media sectors:
 - Metropolitan and Regional Television
 - Metropolitan Radio
 - National, Metropolitan & Regional Newspapers
 - Consumer Magazines
 - Out Of Home
 - Cinema
 - Direct Mail
 - Online (Display)

About The Nielsen Company

The Nielsen Company (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 assets. The company has a presence in approximately 100 countries, with headquarters in New York, USA. For more information on The Nielsen Company, visit www.nielsen.com