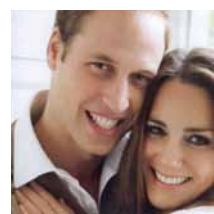


# the top media advertisers



**SAMPLE OF  
REPORT  
CONTENTS**













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For the six months:  
**January to June 2011**

# the top media advertisers

January to June  
**2011**

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# the top media advertisers

Ad spending in  
“correction mode”  
as first half of 2011  
finishes 1.8% ahead  
of 2010 and well up  
on 2009



Peter Cornelius  
Managing Director – Media

With today's release of our latest edition of the Top Media Advertisers report, covering the period January to June 2011, and comparisons with the first half of 2010, a clearer understanding emerges as to what extent the “advertising investment correction” trend has impacted media activity in 2011.

It is now evident that media spending wasn't continuing the boom evident last year, but certainly was performing above 2010 with robust double digit growth ahead of 2009. This is evident because we report on all advertising activity, across the 10 major media sectors and this includes advertising placements made directly by marketers, retail and online advertising departments as well as media booking agencies. In this way, we deliver a whole of market perspective on each media across the broad spectrum of their customer bases.

This “whole of market” reporting is an independent perspective that allows our clients to review more accurately, how each of the 39 Major advertising Categories are performing, across each of the 10 media outlets, by Advertiser Groups/ Advertisers, individual products and by individual placements in each media.

Given that the first half of 2010 saw substantial year on year increases in ad spending as the post 2009 recovery gained momentum, for this report we have also reviewed some comparisons across the first half of 2011 with the same period in 2009. In so doing we have garnered some encouraging news for those in the industry who were concerned that a double dip advertising recession was on the cards in 2011 - the first half of 2011 finished up 1.8% on 2010, but well up on 2009 (+11.2%).

## Relatively strong market, despite external factors influencing performance and consumer confidence

Compared to the strong rebound during calendar year 2010, advertising activity in the first half of 2011 slowed considerably but remained relatively buoyant across most media. This we can put down to a correction in the advertising spend growth cycle, however, there were a number of external market influencers, both domestic and global, which further impacted the growth trajectory.

The devastation caused in Southern Queensland by the January flash floods as three quarters of the south of the State were declared disaster areas. With Queensland accounting for 20% of the Australian economy, the floods and tropical cyclone Yazi, together significantly impacted Australia's fruit and

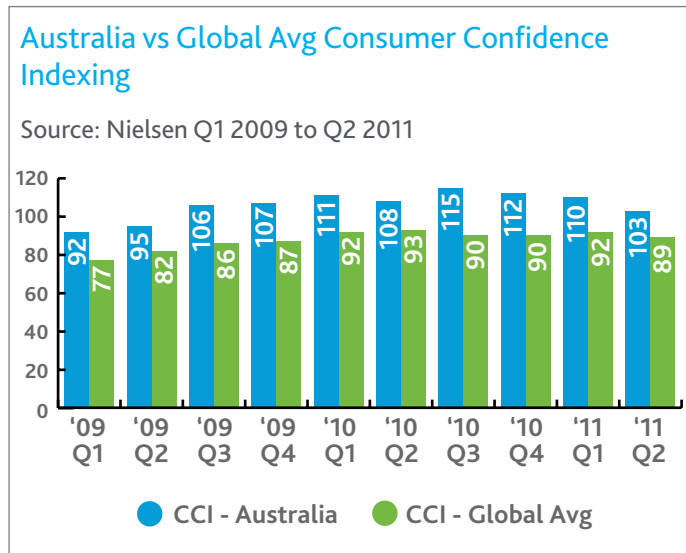
vegetables production (an estimated 30% of total). Agriculture also suffered with sugarcane, cotton and some grains incurring major losses; which translated to dramatic increases on some food prices. Added to this was the substantial loss of production across Queensland's flooded or inaccessible coal mines, which represent more than half of Australia's coking coal exports.

Signs of a double dip global recession as Eurozone leaders debated financial aid for a number of struggling countries including Ireland, Greece, and potentially Spain and Italy, saw stock market confidence and consumer sentiment slide. This and the growing fears of the US facing bankruptcy, further fuelled fears on the global stage. Domestically, we have seen significant political uncertainty with the minority Federal Government over a range of policy issues.

So it's not surprising to see Q2 2011 Nielsen Global Consumer Confidence survey results show that, while Australian consumers' confidence remained ahead of the global average at 103, it had dropped seven points on the previous quarter (Q2), equating to three consecutive quarters of decline.

The key findings were:

- Nearly one-fifth of Australian consumers have no spare cash, higher than at any point during the GFC of 2009
- For the first-time since 2009, consumers are focused on reducing every aspect of household expenditure
- Nearly half of all households are saving any spare cash, but this is being eroded by the onslaught of rising utility and food prices



### Clearly business confidence has also impacted advertising spending, but how did the major Advertising Categories perform?

The combined activity across all 39 major categories we measure, recorded an estimated \$4.82 billion ad spend (+1.8% YOY) from January to June 2011. Despite global and domestic markets uncertainty in the first half of this year, half of Australia's top 10 advertising categories (which represent more than 70 cents of every advertising dollar spent in Australia's main media) recorded growth; while another 2 showed minimal declines.

'11 Pos	'10 Pos	The Top Advertising Categories	All Media	
			\$M	YoY%
1	1	Retail	1,002.0	-0.4
2	2	Motor Vehicles	503.7	-1.0
3	3	Entertainment & Leisure	352.6	0.7
4	5	Real Estate	297.0	9.1
5	4	Finance	287.6	-4.2
6	6	Travel/Accommodation	280.3	12.1
7	7	Food	190.0	-9.4
8	9	Insurance	165.4	15.6
9	8	Communications	145.6	-6.2
10	11	Media	138.7	2.9

Australia's biggest spending category is Retail, which in 2011 has recorded a minimal 0.4% decrease YOY, with an overall estimated ad spend of \$1.0 billion, accounted for almost 21 cents of every advertising dollar invested in main media. The other minimal cutback across the Top 10 was 2nd ranked Motor Vehicles \$503.7M (-1.0%). Some of the strong growth categories included Real Estate (+9.1%), and double digit increases for Travel/Accommodation (+12.1%) and Insurance (+15.6%).

Several big spending categories outside of the Top 10 also delivered robust growth YOY, including Pharmaceutical (+20.3%), Community/Public Service (27.0%), Utilities-Energy & Water (+83.9%) and Clothing & Accessories(+15.2%).

Not surprisingly, 2011 was not a continuation of business as usual for the more vulnerable Top Categories; as we noted cutbacks in spending across Finance (-4.2%), Food (-9.4%) and Communications (-6.2%). Also cutbacks were noted across Recruitment (-5.8%), Toiletries & Cosmetics (-6.7%), Appliances Home & Outdoor (-9.4%) and Beverages-Non Alcoholic (-12.6%).

### Again a mixed result across Australia's Top Advertiser Groups / Advertisers

The categories which were most representative in this elite list of Top 25 Advertiser Groups/Advertisers, who accounted for over 20 cents of every main media advertising dollar invested in the first half of 2011, were Retailers (5), Finance (5) FMCG (4), Governments (4), Telecommunications (2) and Motor Vehicles (2).

'11 Pos	'10 Pos	Advertiser Groups/ Advertisers	All Media	
			\$M	YoY%
1	1	Wesfarmers Limited	93.8	-13.9
2	3	Government Commonwealth	76.5	9.6
3	4	Woolworths Limited	69.9	12.7
4	2	Harvey Norman Holdings Ltd	66.2	-6.0
5	12	Commonwealth Bank Australia	38.7	3.3
6	8	Government NSW	38.4	-6.3
7	6	Government Victoria	38.1	-23.0
8	7	Unilever Group	37.1	-17.0
9	5	Telstra Corp Limited	35.7	-39.3
10	31	Government Queensland	34.0	53.0

# the top media advertisers

## January to June 2011

### The Top Main Media Advertiser Groups/Advertisers

Rank 2011	Rank 2010	Advertiser Group/Advertiser	2011 Est Spend in \$Millions	Advertiser/Key Brands	YOY %
1	1	Wesfarmers Limited	93.8	Coles, Bunnings, Target, Officeworks, Kmart, 1st Choice Liquor Superstore, Liquorland	-13.9
2	3	Government Commonwealth	76.5	Health & Ageing, Medibank Private, Defence, Aust.Health Management, Family & Community Services, Meat & Livestock	9.6
3	4	Woolworths Limited	69.9	Woolworths, Dan Murphys, Big W, Dick Smith Electronics, BWS-Beer Wine Spirits, Woolworths Ltd	12.7
4	2	Harvey Norman Holdings Ltd	66.2	Harvey Norman, Domayne, Joyce Mayne	-6.0
5	12	Commonwealth Bank Australia	38.7	Commonwealth Bank, Bankwest, Colonial First State	3.3
6	8	Government NSW	38.4	RTA, Cancer Institute, Dept Of Health, Tourism Commission, Dept Of Premier, Energy Australia, Sydney Opera House Trust	-6.3
7	6	Government Victoria	38.1	Transport Accident Comm, Justice, Transport, Workcover Authority, Cancer Council VIC, Tourism Victoria, Sustainability & Environment	-23.0
8	7	Unilever Group	37.1	Dove, Lipton, Lynx, Rexona, Flora, Streets, Omo, Continental, Comfort, Sunsilk, Vaseline	-17.0
9	5	Telstra Corp Limited	35.7	Telstra, Sensis	-39.3
10	31	Government Queensland	34.0	Tourism QLD, Health, Transport & Main Roads, Infrastructure & Planning, Premier & Cabinet, Rail, Ergon Energy	53.0
11	14	Suncorp Group	33.8	AAMI, Suncorp-Metway, APIA, GIO, Shannons, Bingle.com, Just Car Insurance	-4.1
12	11	McDonalds Family Restaurants	33.1	McDonalds Family Restaurants, McCafe	-12.2
13	10	Toyota Motor Corporation	32.8	Toyota, Lexus	-16.7
14	15	Nestle Australia Group	32.5	Nestle, Uncle Tobys, Nescafe, Maggi, Jenny Craig	2.9
15	25	National Australia Group	31.7	National Australia Bank, MLC, Ubank, Bank Of New Zealand	29.6
16	9	SingTel Group	31.1	Optus, Virgin Mobile	-21.3
17	28	Reckitt Benckiser	31.0	Nurofen, Finish, Napisan, Pine O Clean, Strepsils, Airwick, Dettol, Easy-Off Bam, Mortein, Aerogard	30.7
18	13	Westpac Banking Corporation	30.5	Westpac, St George, RAMS, BT Financial, BankSA, Bank of Melbourne	-14.3
19	16	Procter & Gamble Aust	29.9	Oral B, Olay, Pantene, Gillette, Clairol, Head & Shoulders, Wella, Duracell	-3.2
20	24	ANZ Banking Group Ltd	29.7	ANZ Bank, OnePath	20.3
21	19	News Corporation Limited	28.6	News Limited, News Digital Media, 20th Century Fox Film Distributors	2.2
22	18	Myer Ltd	27.9	Myer Stores	-4.3
23	17	Village Roadshow Group	27.5	Roadshow Film Distributors, Village Cinemas, Warner Village Theme Park, Roadshow Home Video	-10.6
24	21	QANTAS Airways Ltd	27.4	QANTAS, Jetstar, Air Pacific, QANTASLink, Oneworld	3.1
25	29	Hyundai (Aust) Ltd	26.6	Hyundai	14.8

Source: Nielsen Top Media Advertiser Groups /Advertisers - January to June 2011

# Guide to 2011 Media Coverage



## Metropolitan Television

Advertising activity is monitored across the three commercial networks and SBS in Sydney, Melbourne, Brisbane, Adelaide and Perth. All advertisements across the 7, 9, 10 and SBS Networks in all cities, 24 hours a day, are electronically captured through our proprietary TVPix system. TV sponsorships, billboards, vignettes and in-program content are not costed.

*Note: The new digital FTA Metro TV channels are being monitored, however, no cost estimates are currently included.*



## Regional Television

Monitoring of Regional Television covers Northern and Southern New South Wales, Victoria, Queensland, Western Australia, Tasmania and Darwin. Nielsen Media does not monitor Regional Television in South Australia, Northern Territory, Western Queensland, Mildura and Griffith. Our data is derived directly from the station logs supplied to us – no visual verification takes place.



## Metropolitan Press

Monitoring covers daily Newspapers across Sydney, Melbourne, Brisbane, Adelaide, Perth and Tasmania plus the 2 major national dailies. All advertisements are visually verified. Coverage of Classifieds includes all display advertisements of 10 column centimetres or above. Loose inserts are monitored, but not costed in this report. Advertisements are scanned and available to subscribers on the MediaPix website.



## Regional Press

Monitoring covers major Regional daily publications, however, Suburban Press is not monitored. Within the monitored publications, only display ads of 40 column centimetres or above are monitored. Classifieds are not monitored. All activity is visually verified.



## Magazines

Monitoring of Australia's top 160+ consumer titles including Newspaper Inserted Magazines. All advertising activity is visually verified, and all titles are also scanned for advertisements and available to subscribers on the MediaPix web site. Inserts are monitored, but not costed in this report.



## Radio

Monitoring of the main commercial stations in the five capital cities – Sydney, Melbourne, Brisbane, Adelaide and Perth. Our activity data is derived directly from station logs and is not independently verified. Live reads are not currently monitored.



## Cinema

Monitoring of Metropolitan and Regional Cinema, and derived directly from Val Morgan airtime logs. There is no visual verification for this Media. Stills are not monitored.



## Out of Home

Nielsen works in cooperation with all major Out of Home organisations to report on activity across all major formats and sizes. Excluded are sporting arenas and miscellaneous Out of Home.



## Direct Mail

Nielsen MailPix provides Direct Mail activity volume and spend estimates at a category, advertiser and product level down to individual campaigns. Spend estimates are based on postage and exclude costs associated with production and creative. These estimates are derived from all addressed mail from a 2,000+ national panel, with postage values applied based on weight and size.



## Online

Nielsen accesses the Nielsen Online AdRelevance data from over 600+ sites. The captured data is for display images only. This data is harmonised across the same advertiser and product definitions in our AdEx database. Cost estimates are derived by applying varying CPM's across defined sites and sub-sets.

# About the Nielsen Top Media Advertisers Report

## January to June 2011 and YOY

Our biannual Top Media Advertisers Report presents a comprehensive review of advertising performances across each of the ten main media sectors; covering the first half of 2011 (January to June), with the corresponding period in 2010.

This 26 week reporting time frame provides a timely overview of how Australia's advertising industry has performed in 2011 year to date, in comparison to the rapid advertising upturn experienced across the same period of 2010.

- **Top 25 Advertiser Groups/Advertisers (and key products).**
- **Top Advertisers vs. Top Advertiser Groups**  
This section was first introduced in our calendar year 2009 Report to provide clients with a measure of activity planned and placed at an Advertiser (single entities such as Myer, Bunnings etc) rather than at a Group level. This illustrates a level of market relativity, more from a consumer's brand perspective, rather than corporate structure.
- **Top Advertiser Categories and allocations of ad spend across the main media.**
- **Top 25 Advertiser Groups/Advertisers for each of the following 10 main media sectors:**
  - Metropolitan Television
  - Regional Television
  - Metropolitan & National Newspapers
  - Regional Newspapers
  - Metropolitan Radio
  - Consumer Magazines
  - Out of Home
  - Cinema
  - Direct Mail
  - Online

## About Nielsen Expenditure Estimates

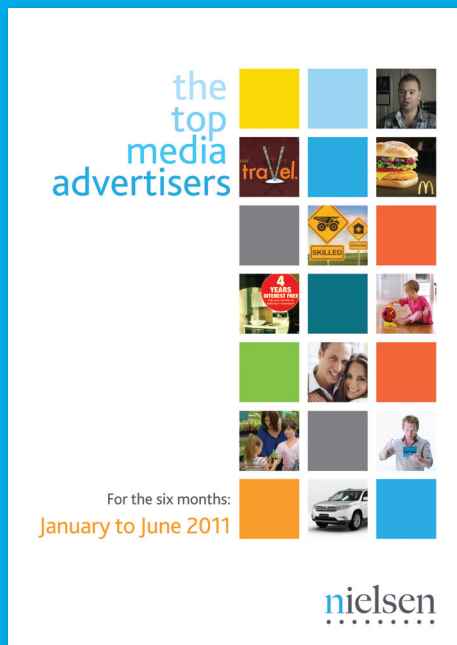
Nielsen continues to put great emphasis on approximating actual expenditure with feedback from the industry. However, the Australian main media scene is a dynamic one and estimating advertising expenditures continues to be a challenging task. As a result, changes are constantly being made to reflect industry feedback. Therefore, year on year comparisons are accurate at the time of producing this report but are subject to variances as updates occur to our database.



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, visit [www.nielsen.com](http://www.nielsen.com)

*Who were the Movers and Shakers in main media advertising in the first half of 2011?*

## Which Top Advertisers and Major Categories in the first half of 2011 maintained momentum following the 2010 surge in media spending?



Our exclusive report presents a comprehensive review of advertising performances in main media for January to June 2011 compared to 2010; also a top line comparison with 2009.

Maintaining the momentum of the advertising recovery in 2010 was always unlikely, however our comprehensive report across 10 main media sectors reveals how the advertising industry maintained subdued but positive growth in the first half of 2011.

- How many of the Top 25 Advertisers recorded double digit growth in January to June 2011?
- Which of the major Advertising Categories attracted the biggest estimated advertising spend increases over 2010?
- Which major Advertisers were actively engaging across multi-media platforms, from TV, Press and Radio to Online, Magazines, Out of Home and Direct Mail?
- The Top 25 Advertiser Groups /Advertisers represented \$983 million of a total \$4.82 billion media spend in the first half of 2011; how many of these cutback their media activity YOY?

Obtain your copy of this major report on the main drivers of ad spending in Australia's main media:

Available for \$6,000 (plus GST) by contacting Scott Gillham: (02) 8873 7622 or [scott.gillham@nielsen.com](mailto:scott.gillham@nielsen.com)

