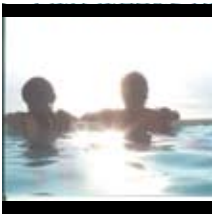
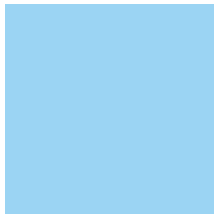
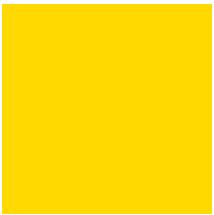


the top media advertisers

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For calendar year:
2010



the top media advertisers

Calendar Year
2010

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the top media advertisers

Business as Usual as 2010 delivers a solid Ad Spend recovery



Peter Cornelius
Managing Director – Media

With today's release of our latest edition of the Top Media Advertisers report for calendar year 2010, we deliver a clearer picture of Australia's advertising industry turnaround.

The good news is that on the back of a strong rebound in advertising activity in late 2009 and throughout 2010, the advertising recovery turned around well ahead of expectations. As would be expected after a strong rebound, in the first half of 2010 there were substantial year on year increases in ad spending as the recovery gained momentum, however, as the latter months of 2010 unfolded, the growth rates compared to the same months in 2009 reduced accordingly.

For the big advertising categories most impacted by the advertising cutbacks of 2009, calendar year 2010 brought a tangible resurgence in activity, with Motor Vehicles, Finance and Communications all posting strong advertising increases year on year.

The media sectors all showed positive results throughout 2010, with most recovering all of the lost ground of 2009 and building on a stronger revenue base for the year ahead. However, 2010 was not a return to business as usual for everyone, as many marketers who had relinquished branding budgets for more retail focussed advertising strategies in 2009, looked to brand building campaigns across expanding multiple platforms. Others undertook reviews of their agency arrangements and based on our Top Media Billing Agencies report for 2010, there was considerable movement and change across Australia's big media agencies throughout the year.

Major Advertising Categories drive growth in 2010 - Overview

The combined activity across the 39 major categories we measure, recorded an estimated \$10.05 billion ad spend (+9.9% YOY) from January to December 2010. Among the Top 10 categories, which represented 70 cents of every advertising dollar spent in Australia's main media, only 10th ranked Media actually recorded a small decline (1.1% YOY).

Australia's biggest spending category is Retail, which in 2010 recorded an increase of 7% to \$2.18 billion, accounting for almost 22 cents of every advertising dollar invested in main media. Other major growth trends across the Top 10 included 2nd ranked Motor Vehicles which saw a surge to \$1.06 billion (+14%), and double digit increases for Finance (+13%), Real Estate (+19%), Communications (+12%) and Insurance (+13%).

Many of the big spending categories outside of the Top 10 also delivered robust growth YOY, the more notable being 12th ranked Toiletries & Cosmetics (+15%), 16th ranked Appliances Home & Outdoor (+39%) and 20th ranked Clothing & Accessories (+18%).

'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

Strong boost in activity across Australia's Top Advertiser Groups / Advertisers

The categories which were most representative of this elite group of the Top 25 Advertiser Groups/Advertisers, who accounted for over 22 cents of every main media advertising dollar invested in 2010 were Retailers (5), FMCG (5), Governments (4), Finance (3) and Telecommunications (3).

'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

“ the Top 25 Advertisers list was brimming with positive YOY performances...”

Reflecting the overall surge in business confidence in a robust economy was that only 2 of the Top 25 Advertiser Groups/ Advertisers did not record advertising spend growth ahead of the corresponding 12 months in 2009.

The list was brimming with positive YOY performances, evidenced by the substantial media spend increases YOY among several of the Top 10, led by Australia's top ranked Advertiser Group, Wesfarmers Limited (\$239M +15%) and 2nd ranked Woolworths Limited (\$166M +18%) followed by Harvey Norman Holdings (\$145M +7%). Others recording robust, double digit growth YOY included Telstra Corp Limited (\$120M +21%), Government Victoria (\$104M +12%) and Toyota Motor Corporation (\$82M +26%).

Other extremely positive results were noted outside of the Top 10 for 13th ranked McDonalds Family Restaurants (\$75M +30%), QANTAS Airways Ltd (\$65M +25%), Vodafone Hutchison Australia (\$64M +26%) and Hyundai (Aust) Ltd (\$54M +70%); with a major resurgence to 29th position from 45th in 2009.

Among the Top 25, the only exceptions to the upward trend in 2010 were 6th ranked Commonwealth Government (\$114M -12%), down two spots from 4th, and Westpac Banking Corporation (\$62M), which despite a minimal 0.3% cutback, slid 7 spots to finish 21st this year.

The Top Media Advertisers (not Groups), showed similar growth trends...

Since the inclusion of a separate listing for the Top 25 Advertisers in our 2009 calendar year report, we have been including reviews on how individual company performances are tracking in overall advertising trends.

Although we will continue to report and use Advertiser Groups/ Advertisers activity in the main report; this separate Advertiser level review enables clients to assess and measure activity planned and placed by an Advertiser (single entities such as Bunnings for example showed a slight reduction in activity (-2%) although the overall Wesfarmers Group showed a 15% increase on 2009. In this way we are providing a level of market relativity, more from a consumer brand perspective, rather than as a corporate structure.

'10 Pos	'09 Pos	Top 10 Advertisers (not groups)	All Media	
			\$M	YoY%
1	1	Harvey Norman	109.9	9.7
2	3	Woolworths Supermarkets	98.8	28.7
3	2	Telstra Corp Ltd	97.0	18.2
4	4	Unilever Australia	80.1	9.5
5	5	Coles Supermarkets	77.1	18.6
6	9	McDonalds Family Restaurants	74.7	30.0
7	8	Optus	70.6	21.8
8	10	Toyota Motor Corporation Aus. Ltd	70.0	34.1
9	6	Reckitt Benckiser P/L	63.3	3.1
10	7	Myer Ltd	62.1	1.6

The overall trend across the Top 25 Advertisers was very positive; with only 2 Advertisers, Bunnings and Westpac Banking Corporation showing declines in estimated ad spends YOY. However, all of the Top 10 Advertisers increased activity year on year, with six recording strong double digit increases led by Woolworths Supermarkets (\$99M +29%), Telstra Corp Ltd (\$97M +18%) and Coles Supermarkets (\$77M +19%). This elite group of Advertisers combined represented 8% of all main media advertising recorded in calendar year 2010.

Interestingly, sixth ranked McDonalds Family Restaurants (\$78M), also finished in the Top 25 Advertiser Group Advertisers table with a 30% YOY increase to finish in 13th position, up from 19th position in 2009.

Can the advertising recovery be sustained throughout 2011?

At the time of writing in early March 2011, the return to strong and positive growth across most of 2010 had slowed somewhat, reflecting that media activity this year had returned to normal pre GFC trends. However, recent media reports suggest there have been some patchy results across some media in early 2011, possibly reflecting somewhat lowering consumer and business confidence with the devastating floods and cyclone damage across the Eastern Seaboard, fears of escalating food and energy costs, interest rate rises and business uncertainty over the impact of the Government's proposed carbon trading levy.

In summary, despite global financial markets retaining a cautiously optimistic stance, our advertising sector in the first few months of 2011 is maintaining growth over 2010. Our Australian dollar is sitting at parity to the US dollar, and has performed strongly across most currencies globally. At the same time our core production output and exports markets remain buoyant, with the economic performances of our key commodities export markets, China and India, remaining positive.

We hope you find our 2010 Nielsen Top Media Advertisers Report of interest and relevance to your needs, and as always, the release of this report will certainly generate industry interest and comment.

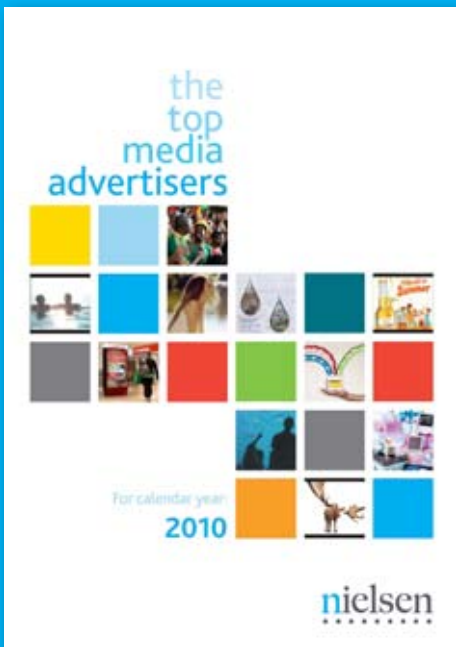
Peter Cornelius
Managing Director Australia - Media
The Nielsen Company

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

Who were the Movers and Shakers in main media advertising in calendar year 2010?

Which Top Advertisers and Major Categories drove the surge in media advertising during 2010?



Our exclusive report presents a comprehensive review of advertising performances in main media for calendar year 2010 compared to 2009.

Although the rapid pace of the advertising recovery in 2010 surprised many industry observers, our comprehensive report across 10 main media sectors reveals how the advertising industry rapidly emerged from the advertising downturn of 2009.

- During 2010, how many of Top Advertisers recorded robust double digit growth compared to 2009
- Which of the 39 major Advertising Categories attracted the biggest estimated advertising spend increases across 2010
- Which of the 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 \$2.23 billion of a total \$10.06 billion media spend in 2010; how many of these showed double digit growth YOY?

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

Available for \$5,500 (plus GST) by contacting Scott Gillham: (02) 8873 7622 or scott.gillham@nielsen.com

