



EUROPEAN ASSOCIATION OF  
COMMUNICATIONS AGENCIES

# European Advertising Business Climate Index

Q4/2017 - Q1/2018



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#AdIndex2018





# ABOUT

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- Quarterly survey of European advertising and market research companies
- Provides information about:
  - managers' assessment of their **business situation Q4/2017 & forecast for Q1/2018**
  - past and future **challenges in companies' turnover**
  - Anticipated **employment and revenue levels**



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## Regions featured in the Index

- **Western Europe:** Austria, Belgium, France, Germany, Netherlands and United Kingdom
- **Central/Eastern Europe:** Bulgaria, Croatia, Czech Republic, Estonia, Lithuania, Latvia, Poland, Romania, Slovakia and Slovenia
- **Mediterranean Europe:** Cyprus, Greece, Italy, Malta, Spain and Portugal
- **Northern Europe:** Denmark and Sweden
- **Advertising Business Confidence Index specific slides for UK, Germany, France, Italy, Spain, Poland and Sweden are available at the end of the report.**
- Ireland, Finland, Luxembourg and Hungary do not provide data



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- Survey carried out nationally by governments, central banks, trade bodies, research institutes, etc.
- **Questionnaire** and common timeline **harmonised by the European Commission (DG ECOFIN)**
- Nominal EU services sample size exceeds **43,000 units (companies)** for the entire services sector

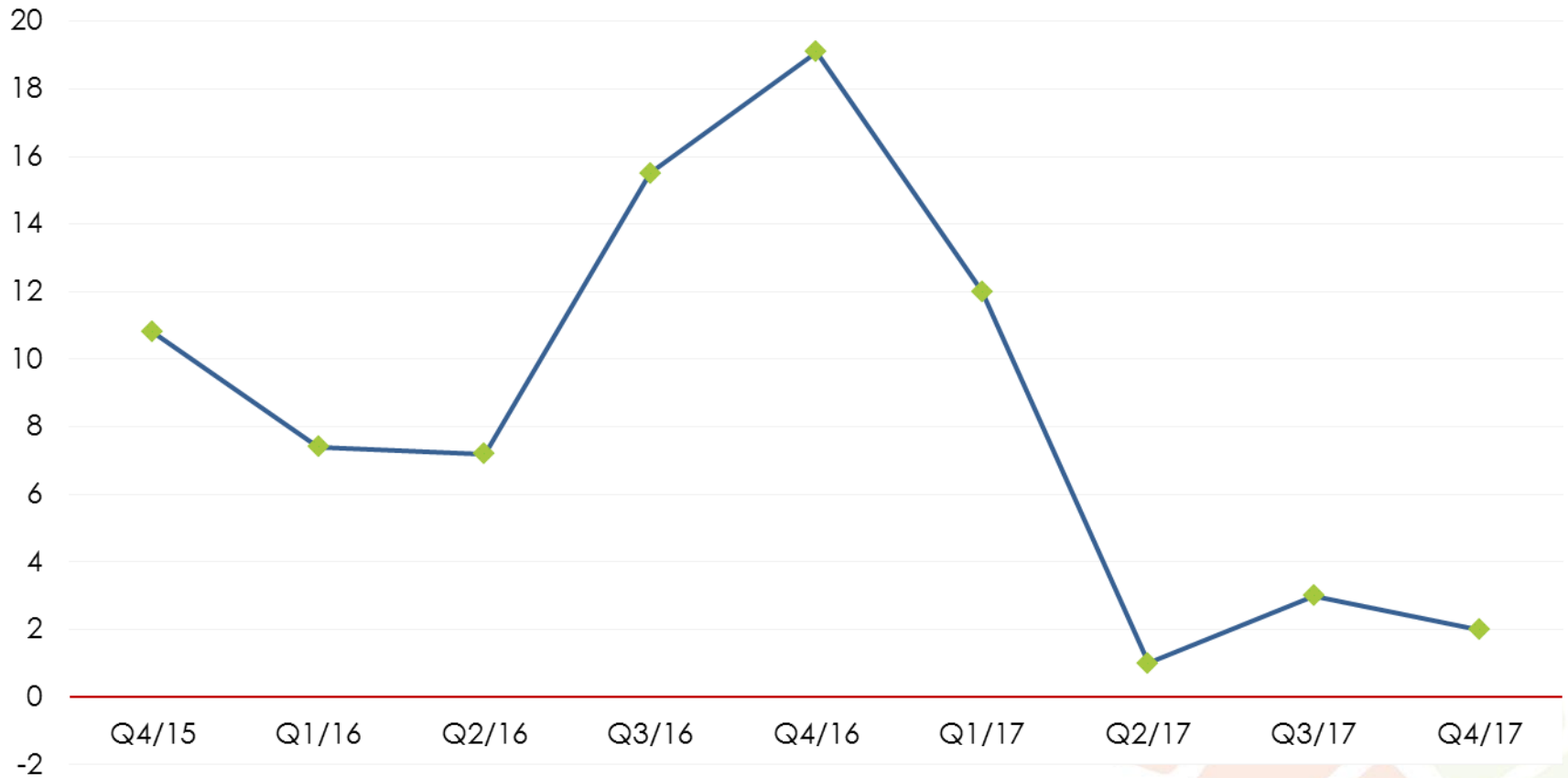
“increase” (+), “remain unchanged” (=), “decrease” (-)

% of positive answers – % of negative answers





# Advertising Business Confidence Index



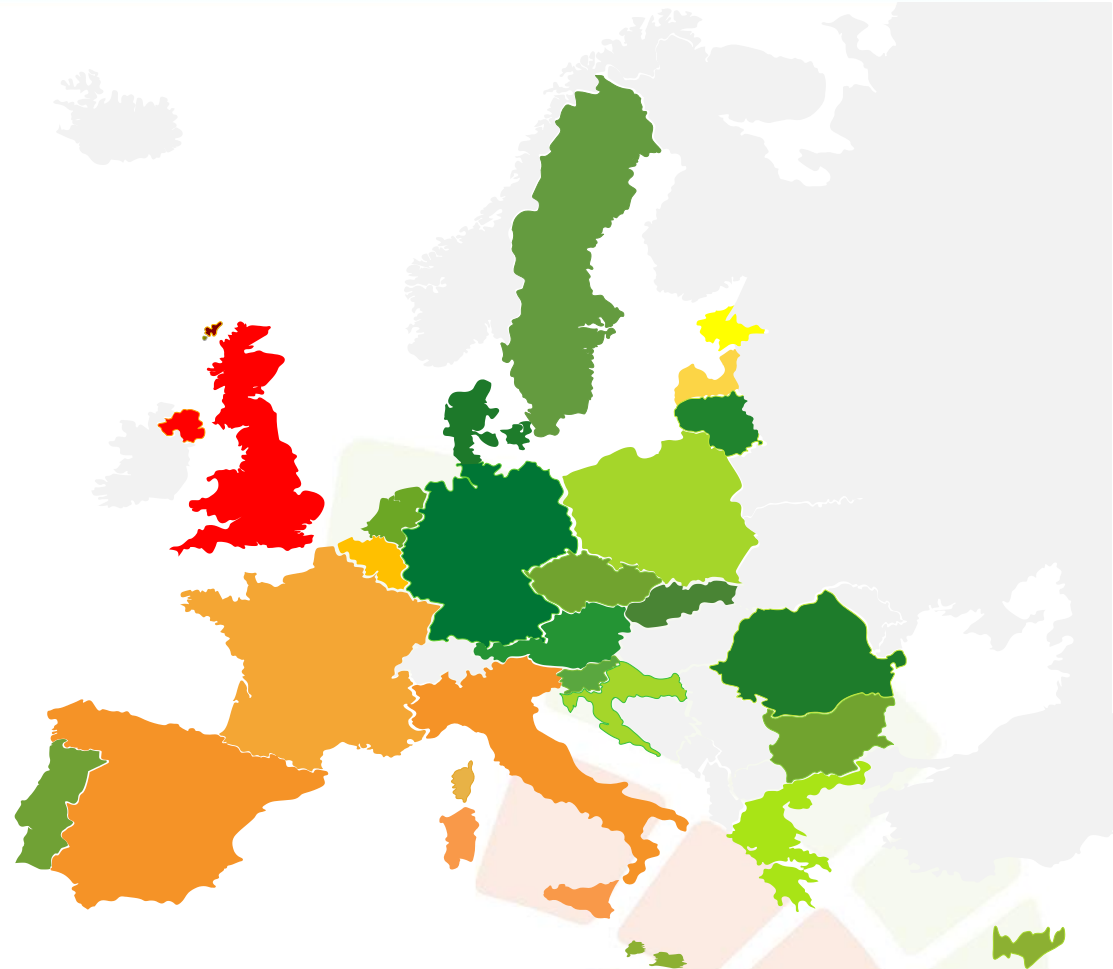


# Advertising Business Confidence Index October 2017

Austria: 18	Italy: -5
Belgium: -4	Latvia: -2
Bulgaria: 12	Lithuania: 24
Czech Republic: 12	Malta: 13
Denmark: 27	Netherlands: 15
Germany: 29	Poland: 7
Estonia: 0	Portugal: 16
Greece: 5	Romania: 24
Spain: -6	Slovenia: 19
France: -5	Slovakia: 22
Croatia: 7	Sweden: 18
Cyprus: 13	United Kingdom: -20,7



Lowest → Highest



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The colour codes for each country are based on October 2017 values of the Advertising Business Confidence Index. The lowest value (The UK, -20,7) is highlighted in red and the highest value (Germany, +29) in dark green, while all others are marked with different shades that lie within the spectrum. **The colour coding for a specific month is adjusted to that country's position relative to the others, with the midpoint being 0 (marked in yellow).** In other words, the country with the highest value in the given month determines the level of green of the other values above 0 that month. Subsequently, the lowest value determines the level of red for the values that are below 0.

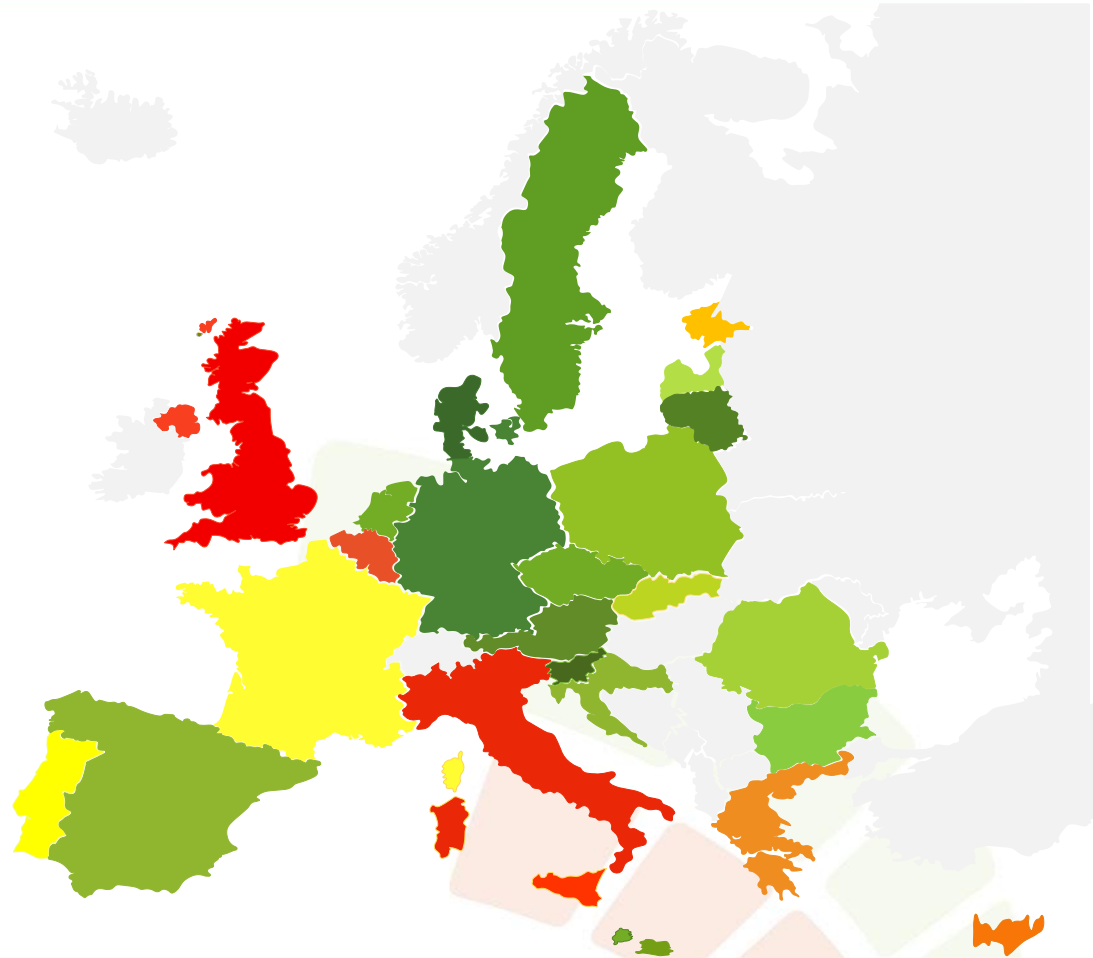


# Advertising Business Confidence Index January 2018

Austria: 23	Italy: -28
Belgium: -17	Latvia: 8
Bulgaria: 14	Lithuania: 28
Czech Republic: 19	Malta: 17
Denmark: 33	Netherlands: 16
Germany: 26	Poland: 13
Estonia: -4	Portugal: 0
Greece: -10	Romania: 12
Spain: 13	Slovenia: 31
France: 1	Slovakia: 10
Croatia: 13	Sweden: 20
Cyprus: -13	United Kingdom: -26,2



Lowest → Highest



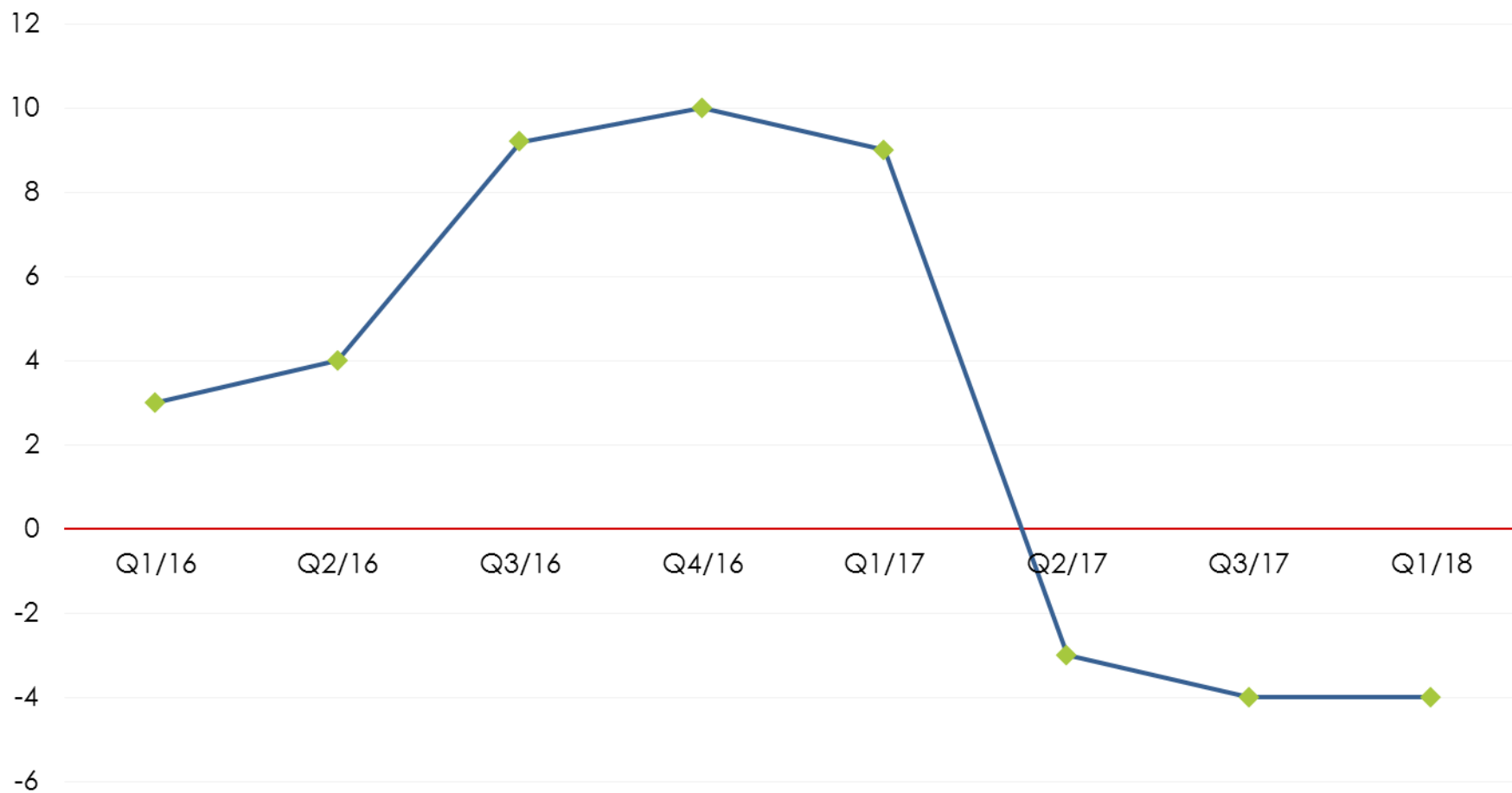
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The colour codes for each country are based on January 2018 values of the Advertising Business Confidence Index. The lowest value (Italy, -28) is highlighted in red and the highest value (Denmark, +33) in dark green, while all others are marked with different shades that lie within the spectrum. **The colour coding for a specific month is adjusted to that country's position relative to the others, with the midpoint being 0 (marked in yellow).** In other words, the country with the highest value in the given month determines the level of green of the other values above 0 that month. Subsequently, the lowest value determines the level of red for the values that are below 0.



## Business development over the past 3 months

How has your business situation developed over the past 3 months?

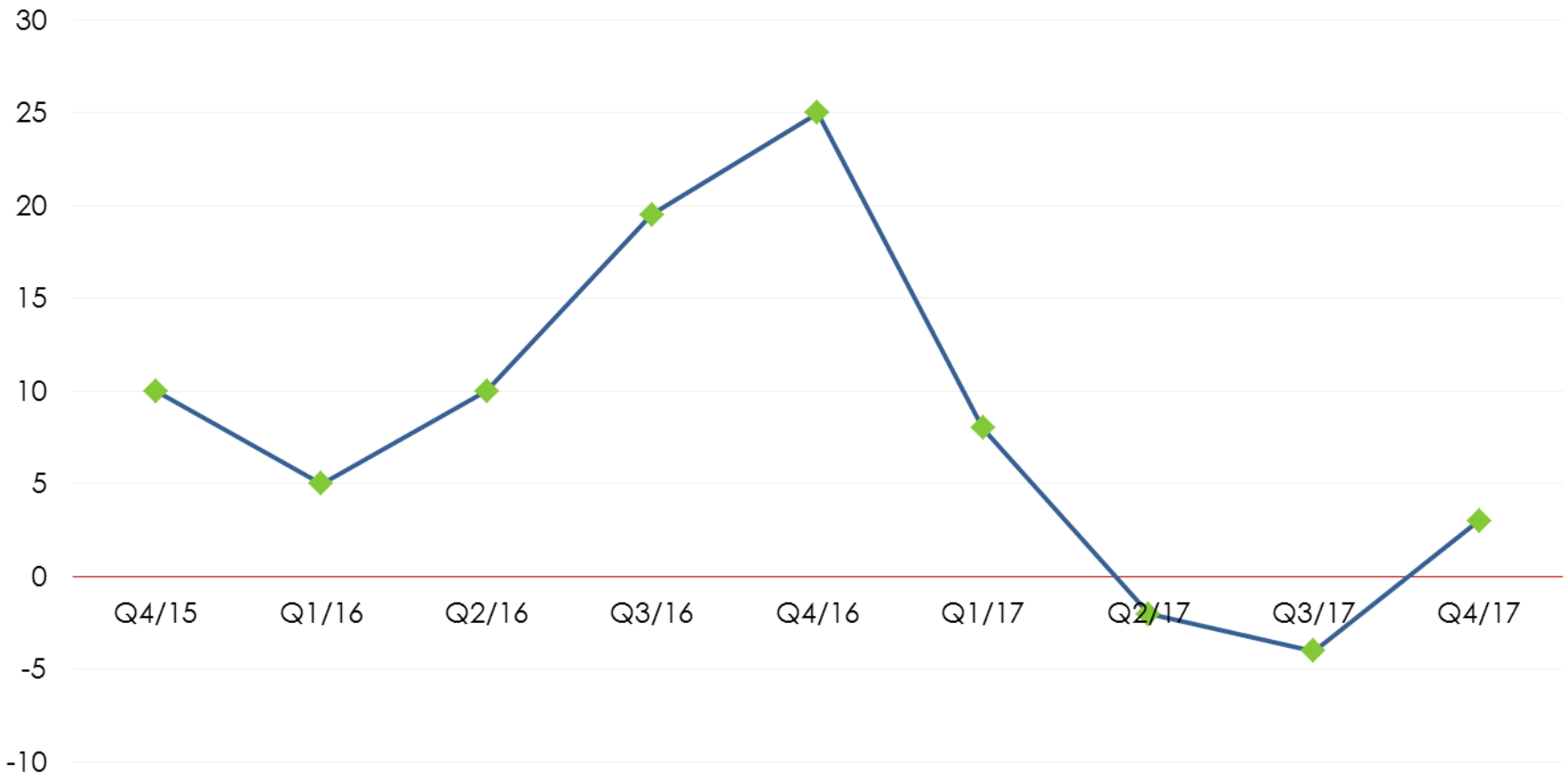






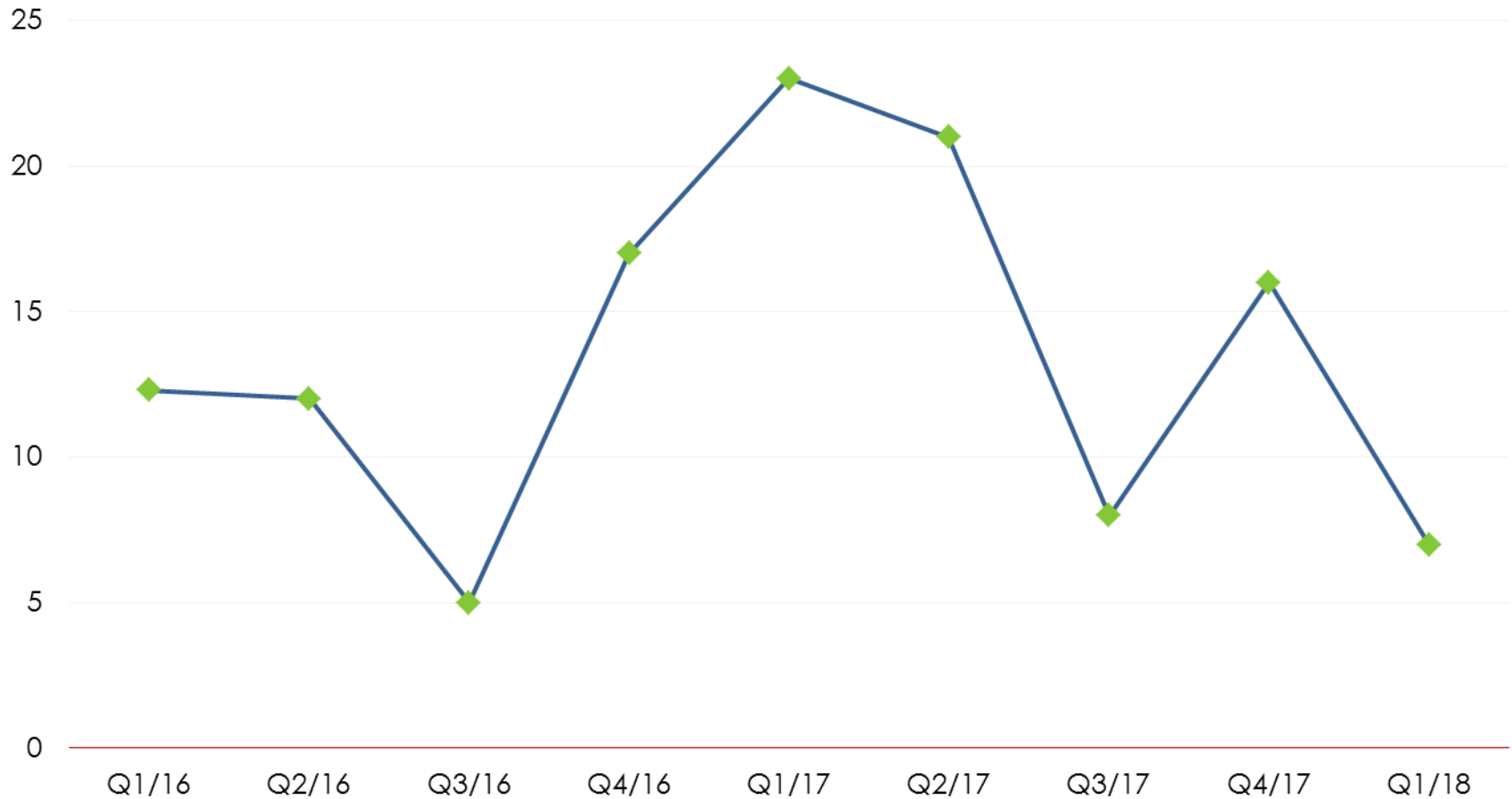
## Evolution of demand for advertising services over the past 3 months

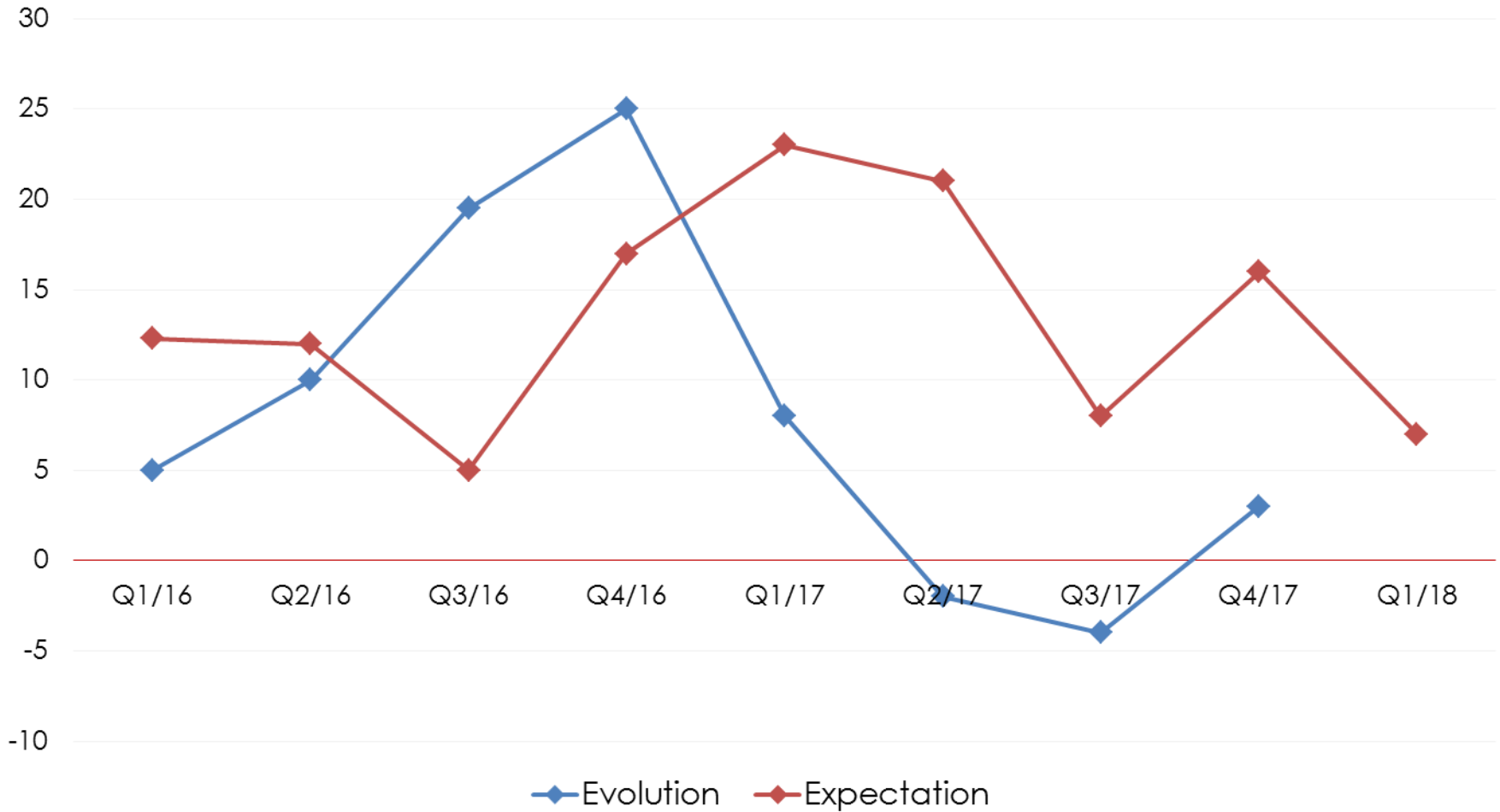
How has your demand (turnover) for your company's services changed over the past 3 months?



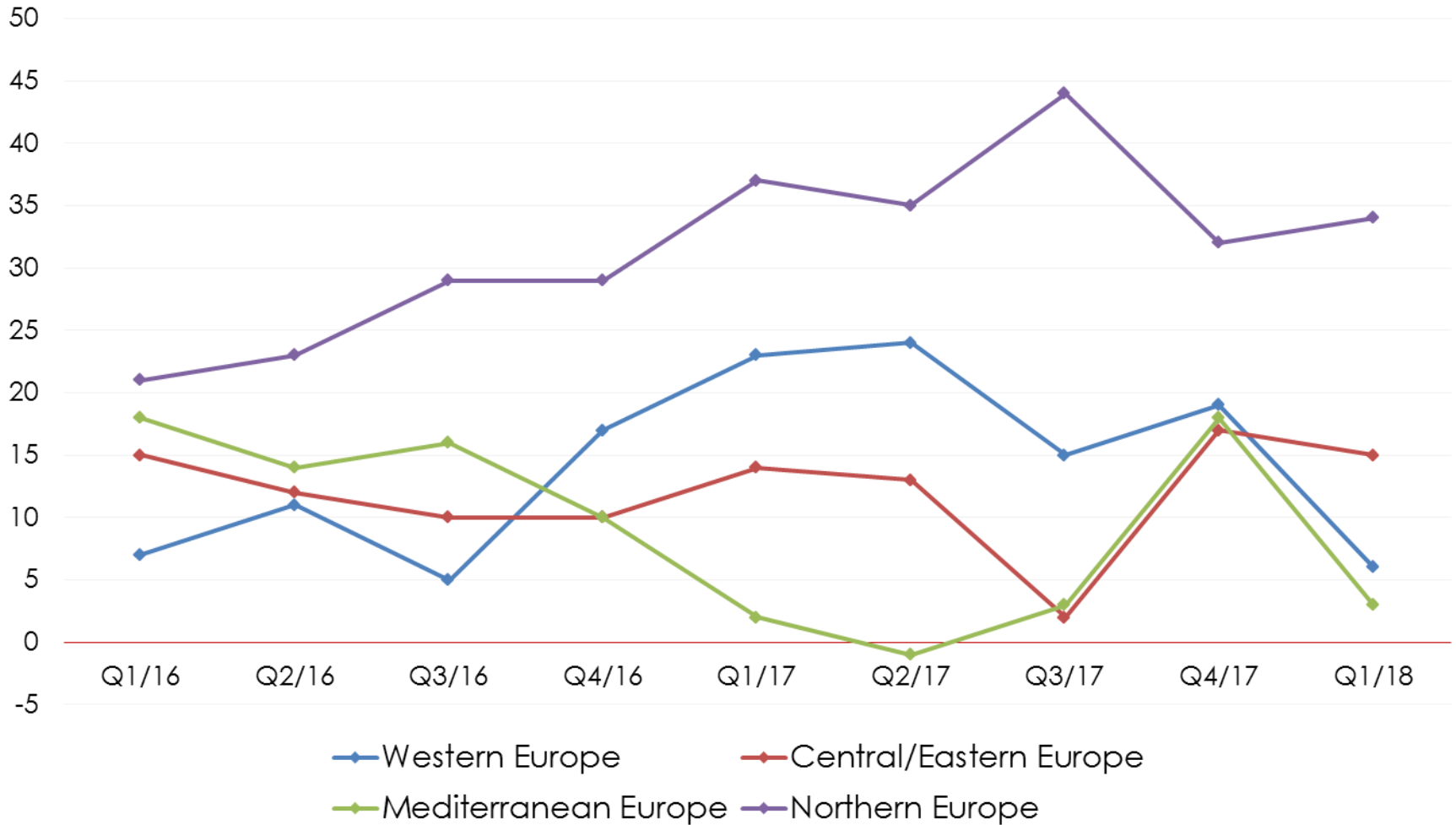
# Expectation of advertising demand over the next 3 months

How do you expect demand for your company's services to change over the next 3 months?

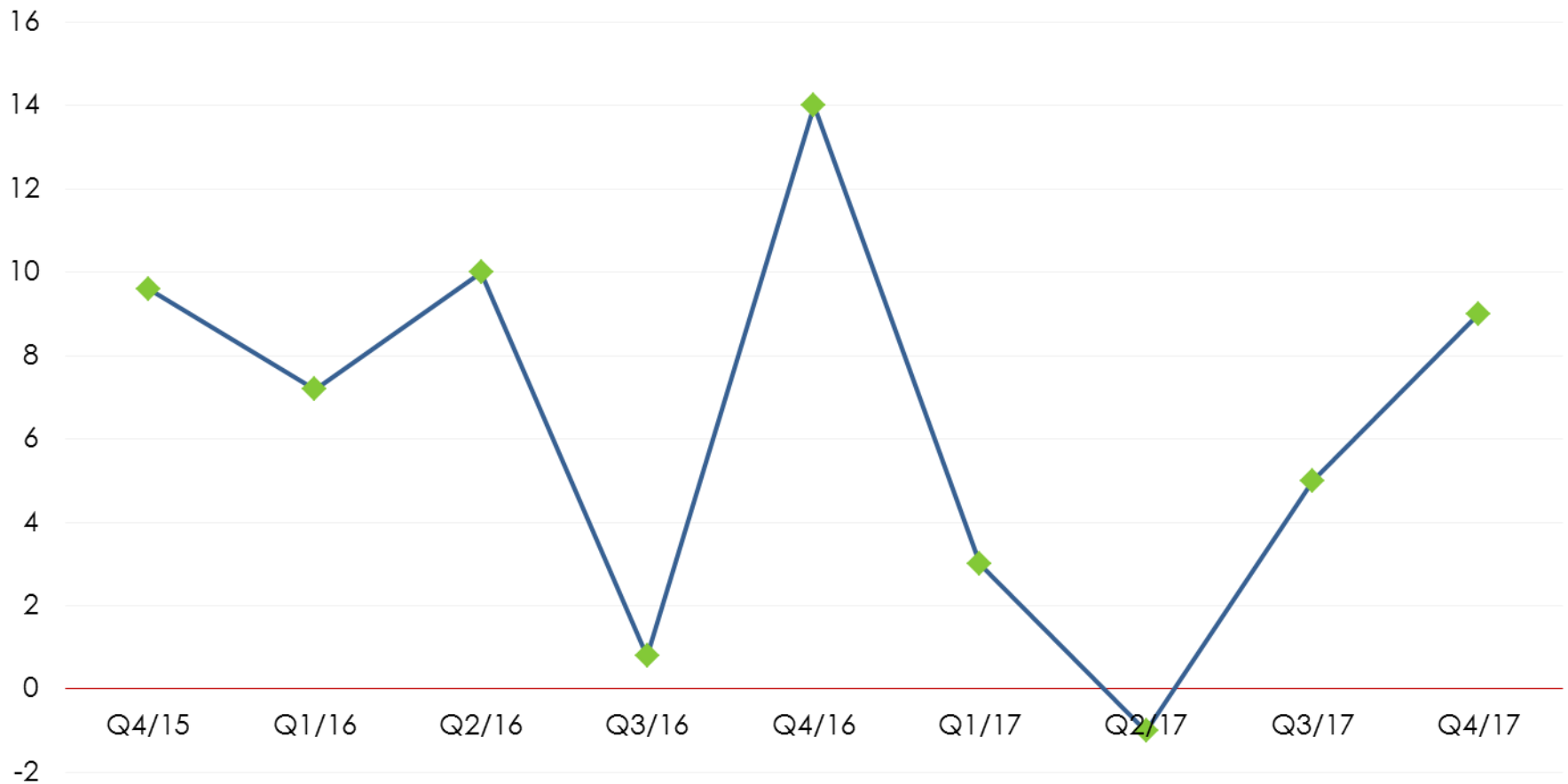




# Expectations of advertising demand over the next 3 months



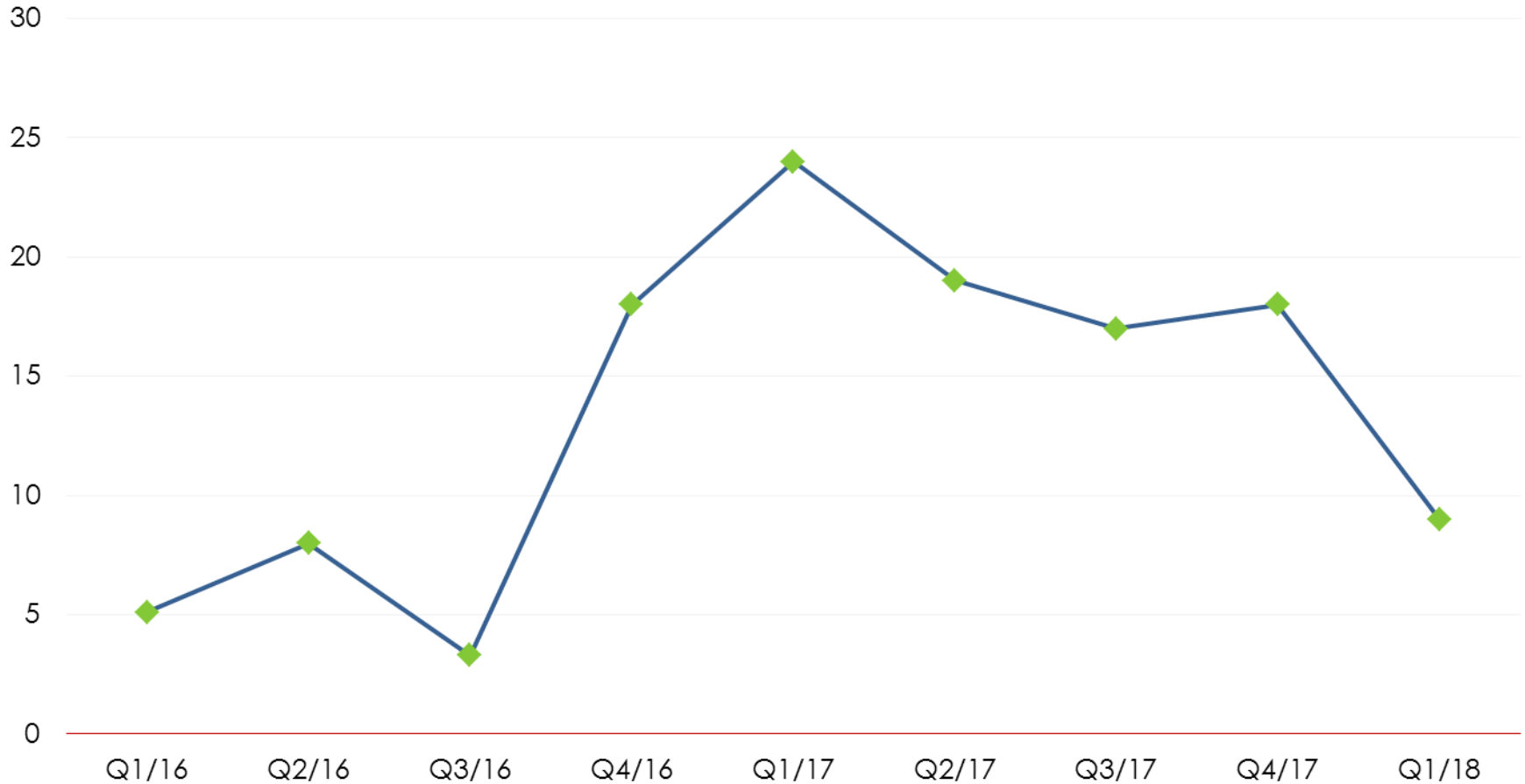
How has your company's total employment changed over the past 3 months?





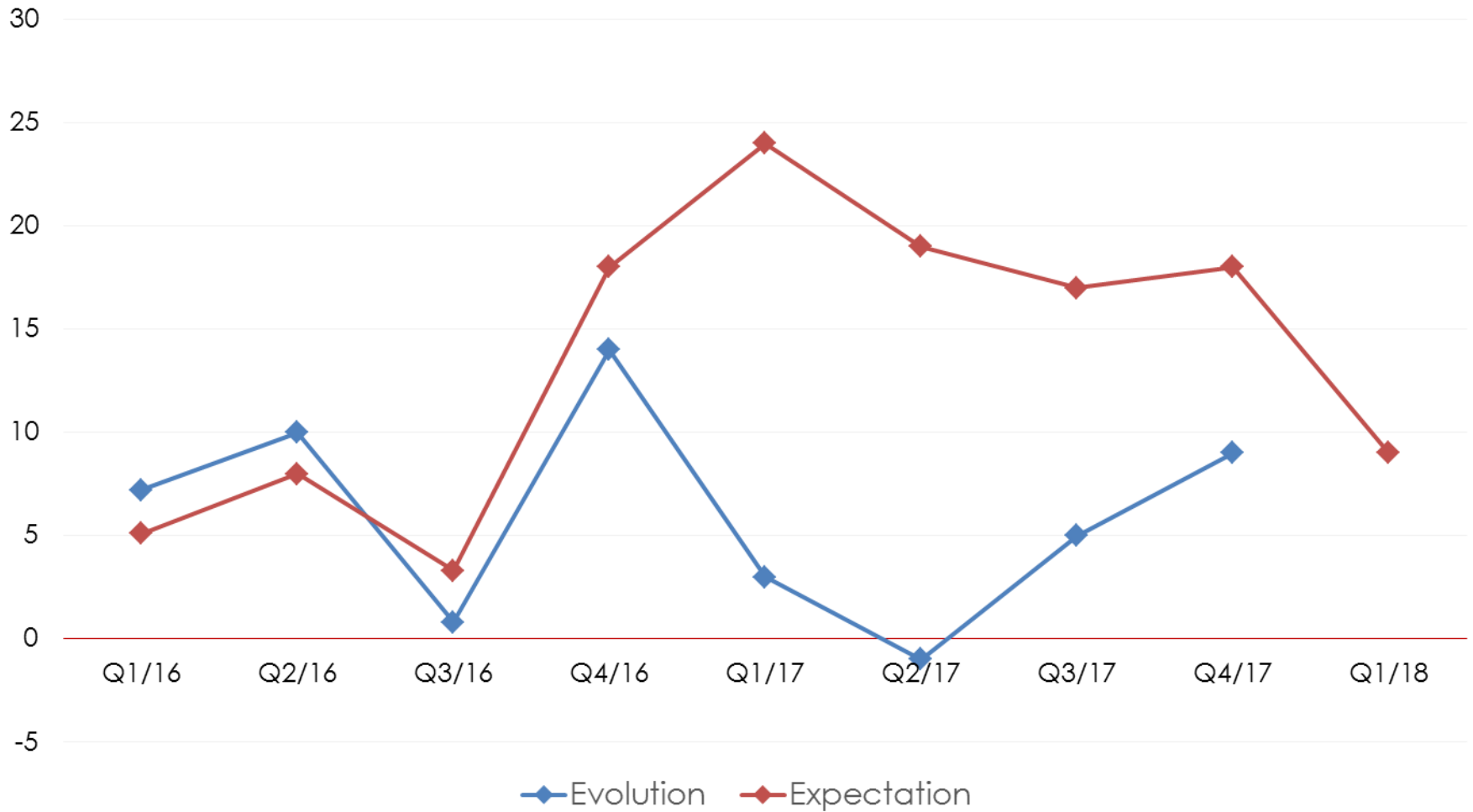
# Expectation of employment over the next 3 months

How do you expect your company's employment to change over the next 3 months?



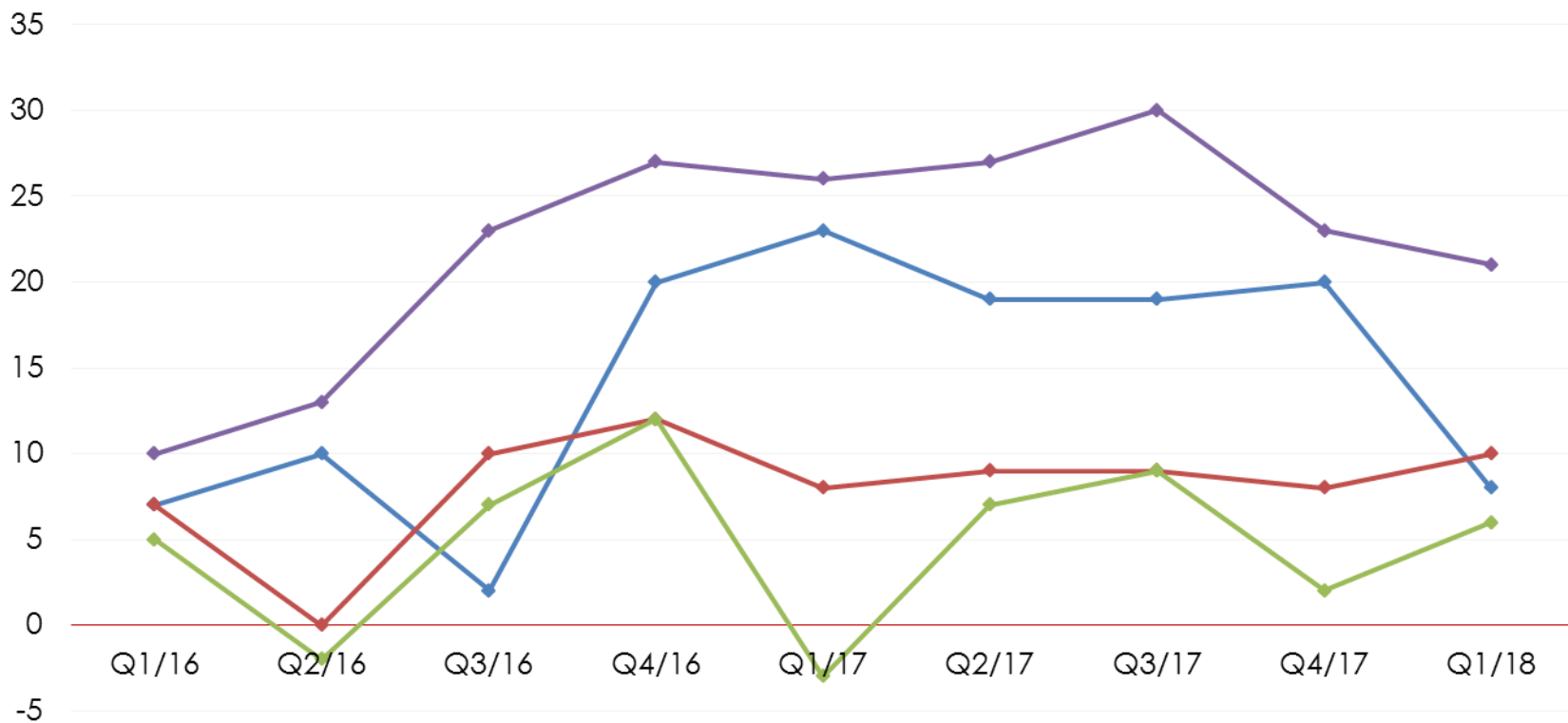


# Employment expectation vs employment evolution





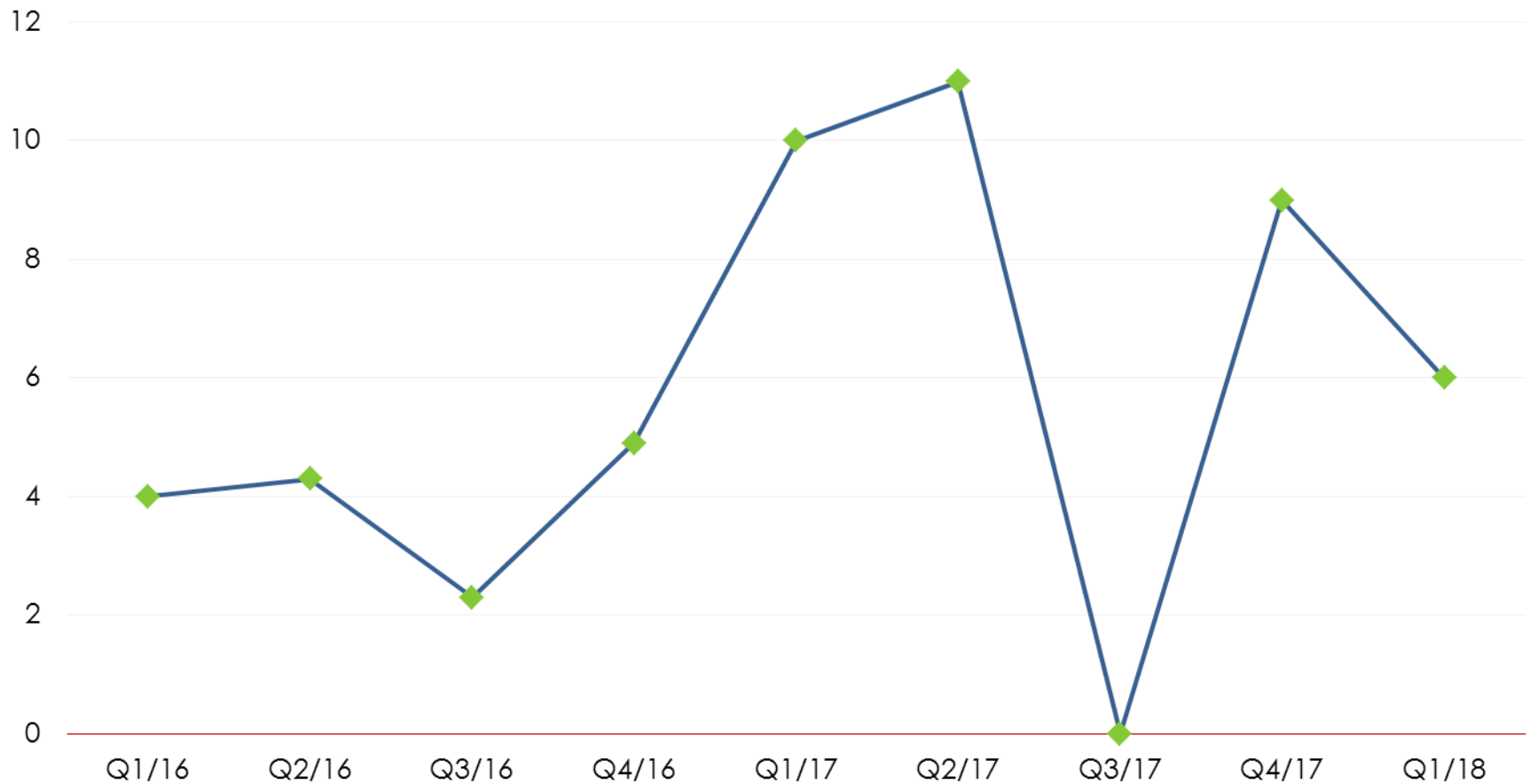
# Expectation of employment over the next 3 months

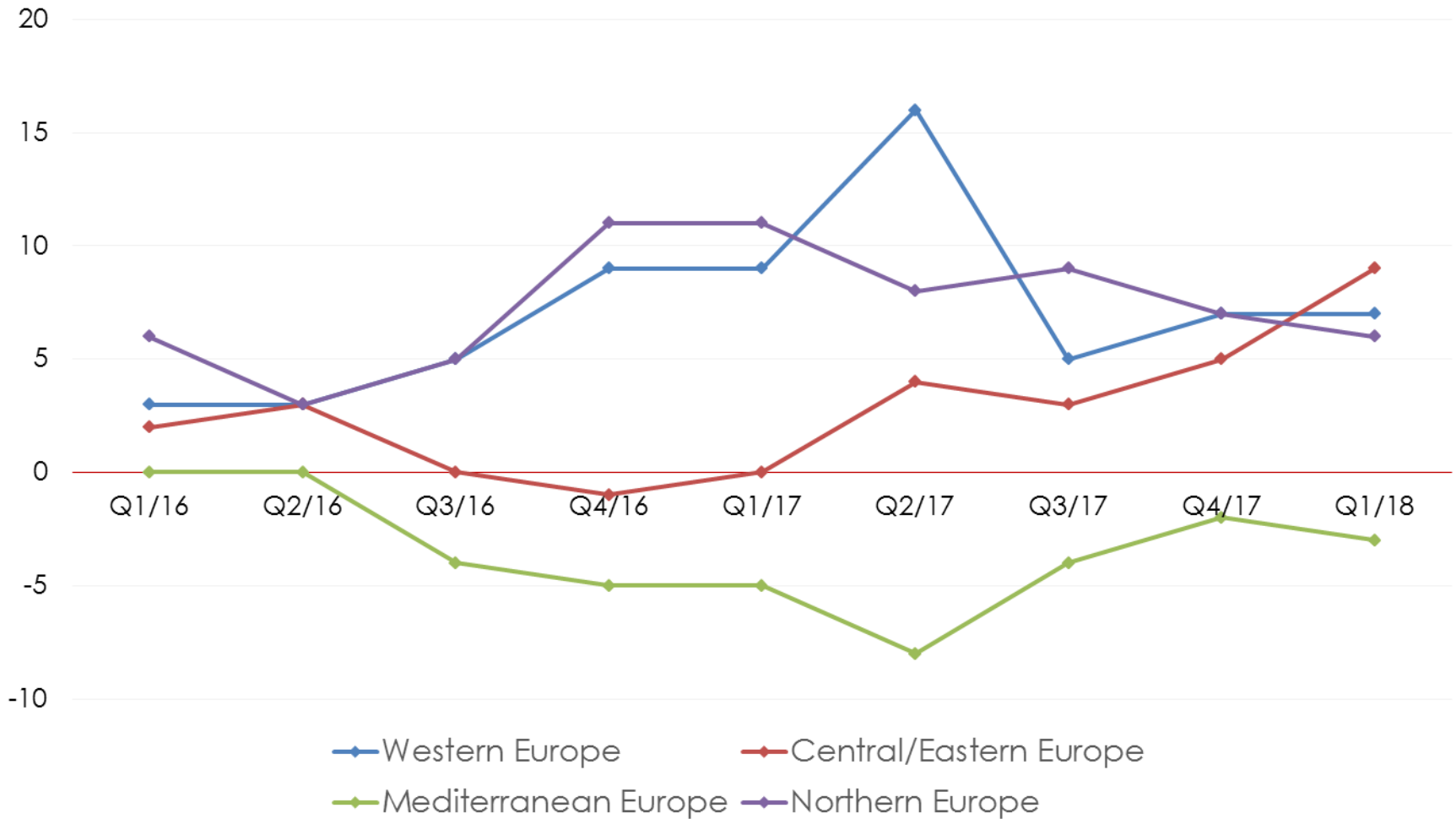


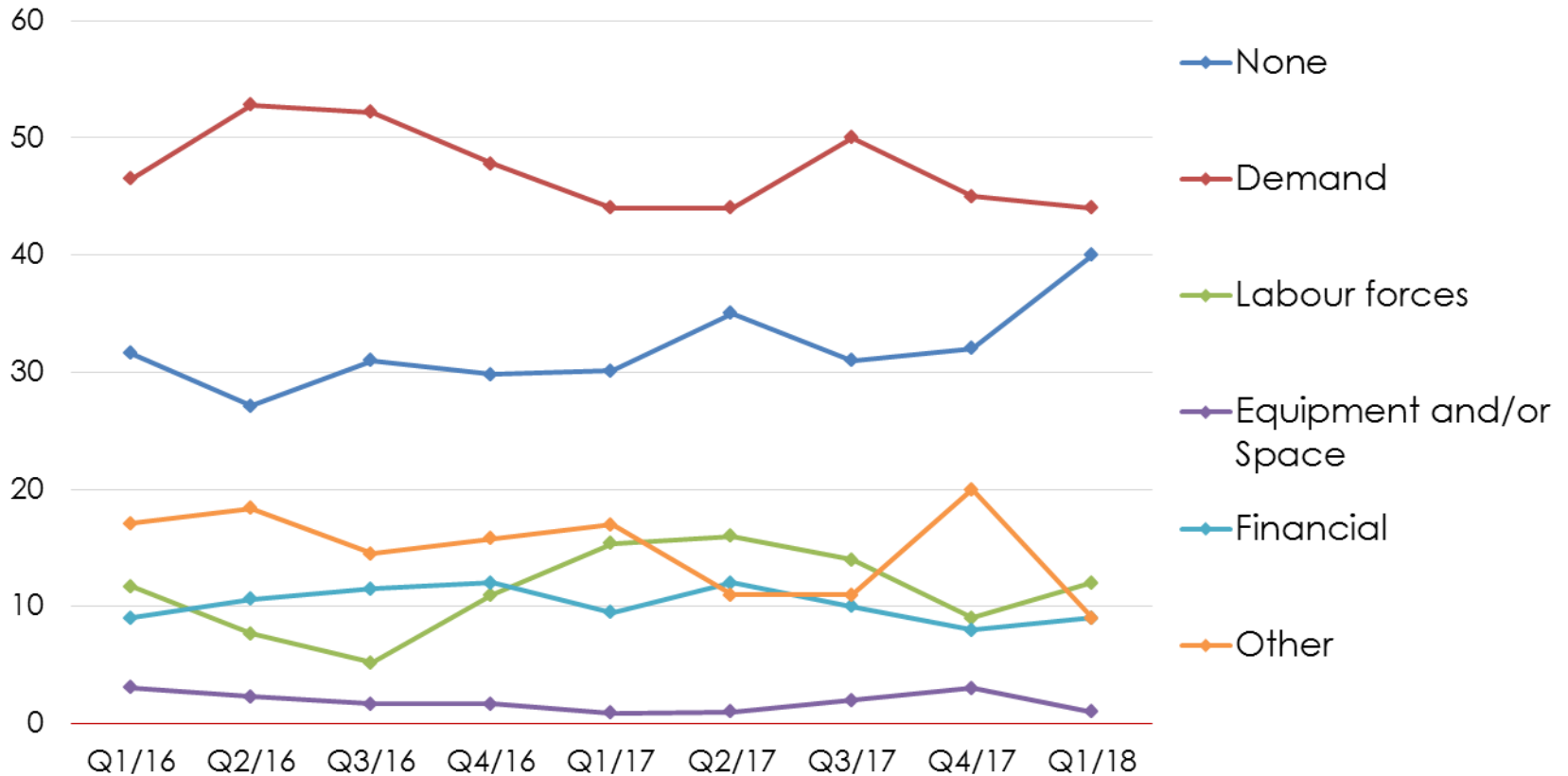
Western Europe Central/Eastern Europe  
Mediterranean Europe Northern Europe



How do you expect prices to change over the next 3 months?



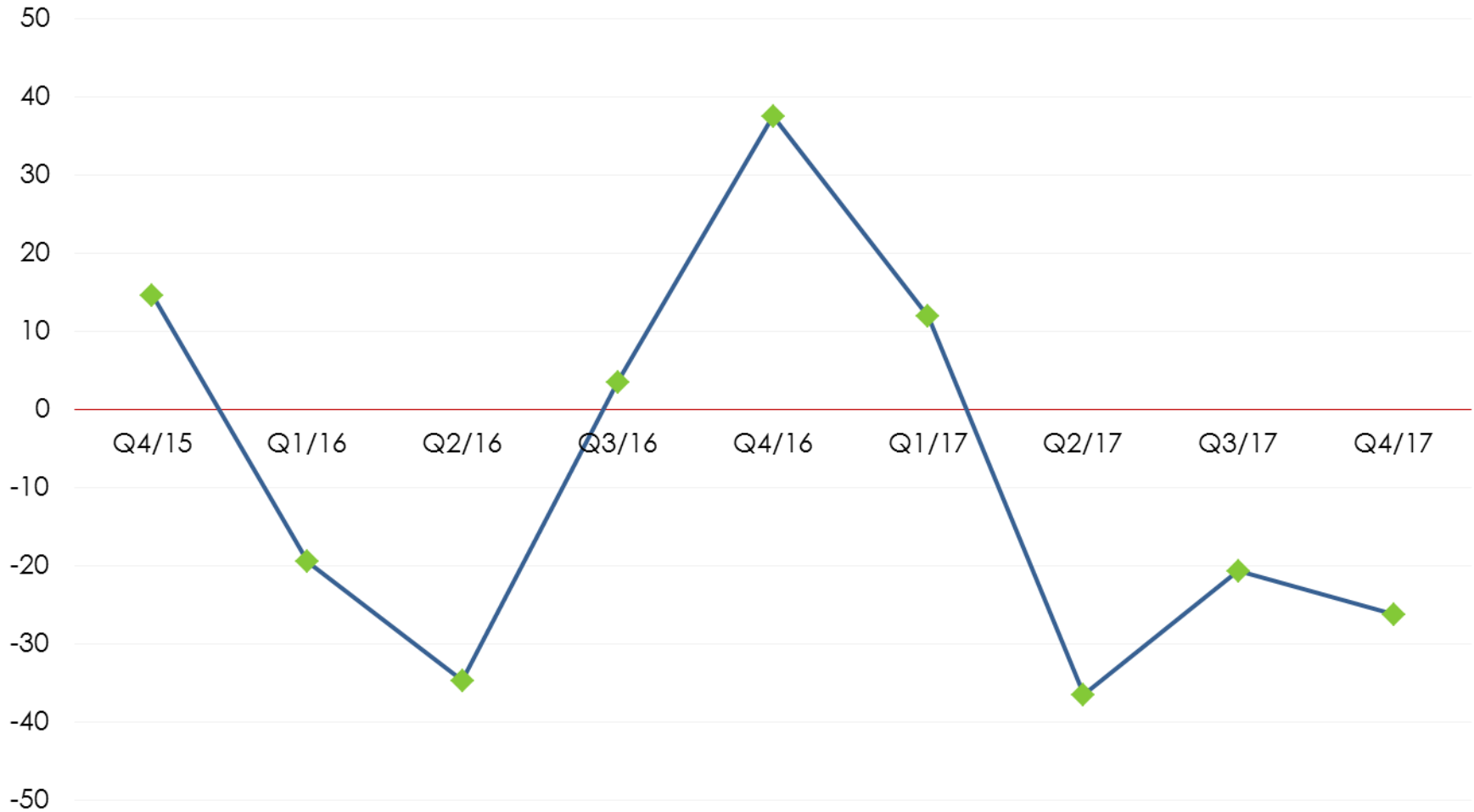






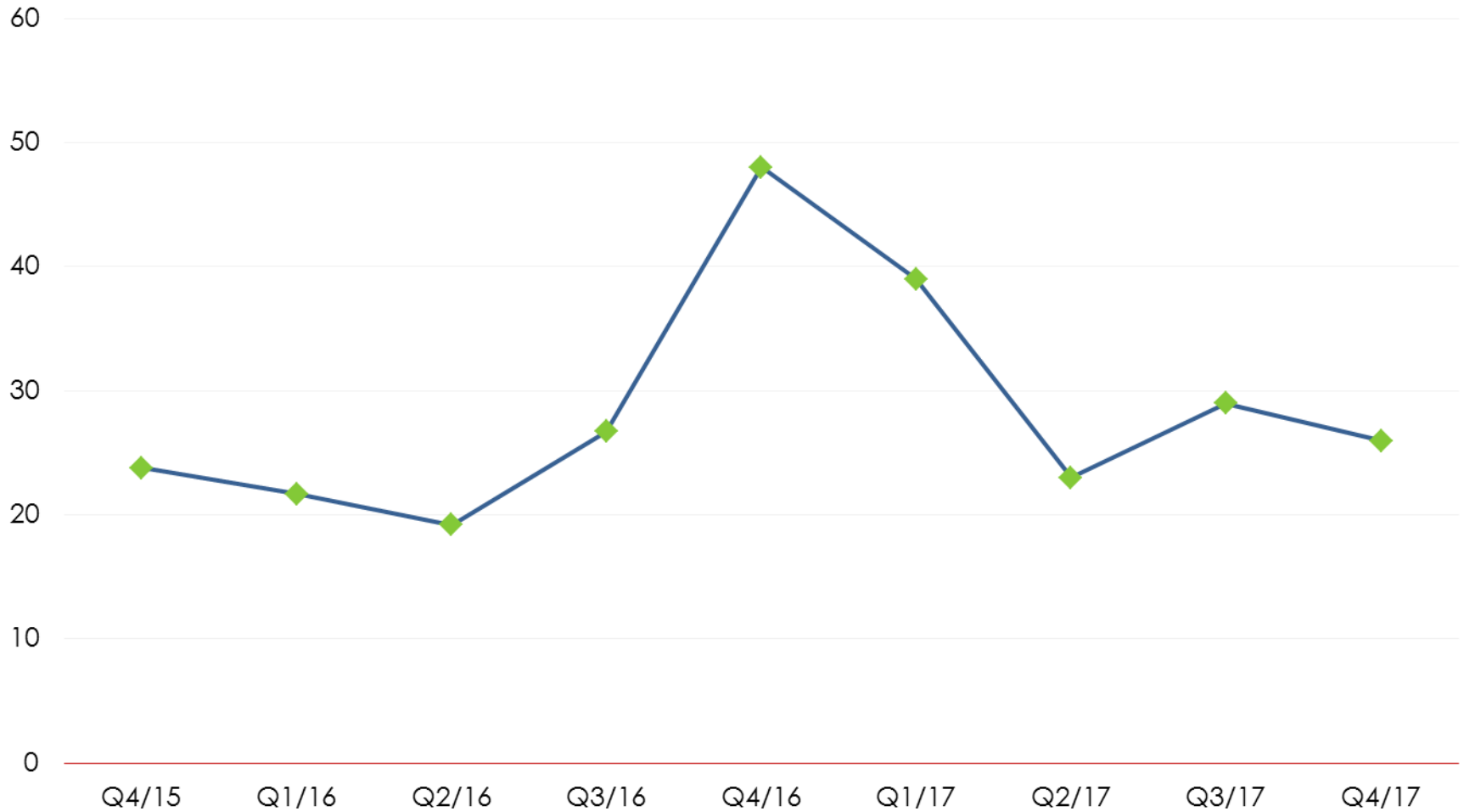
## Country-specific graphs

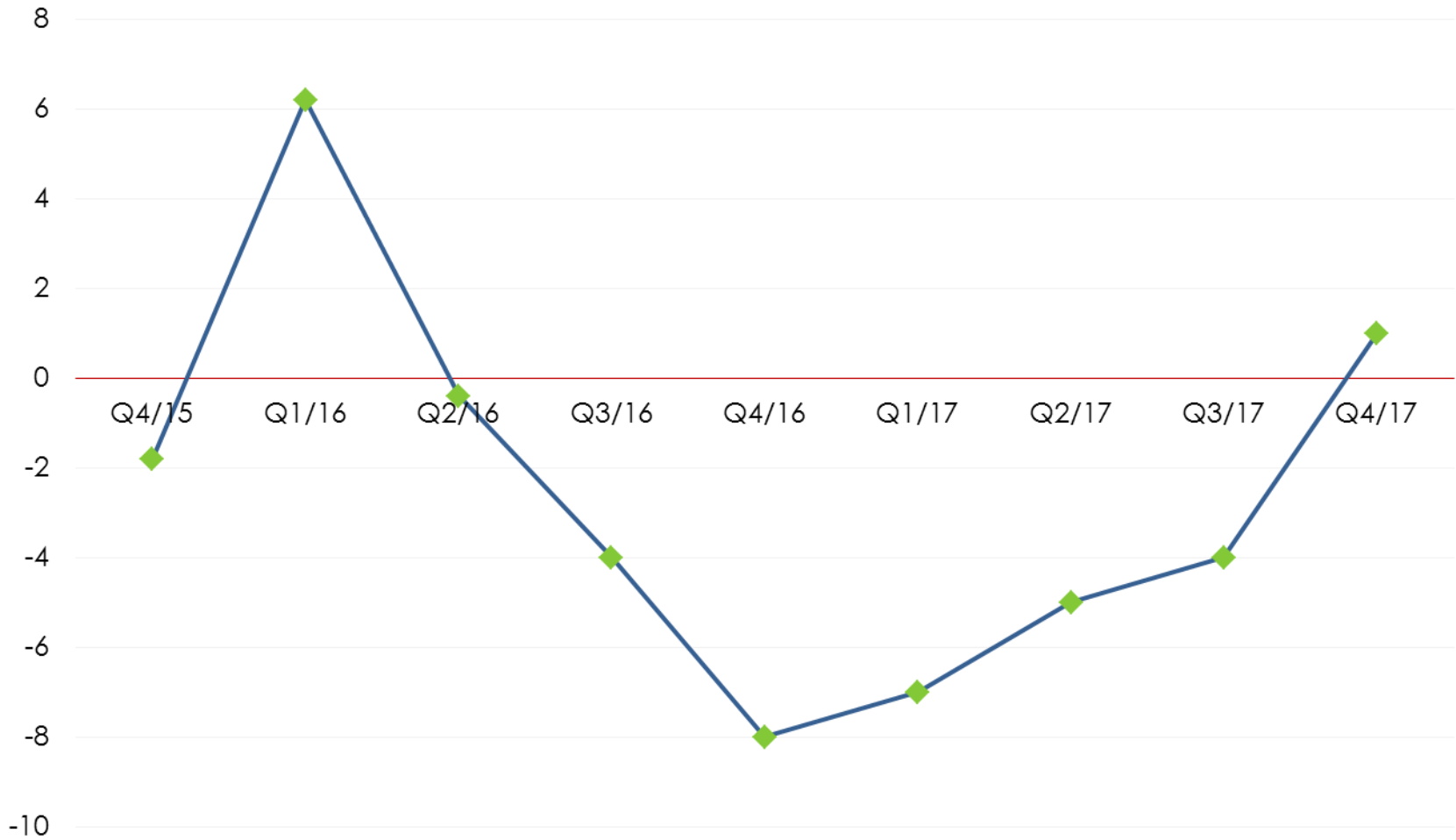






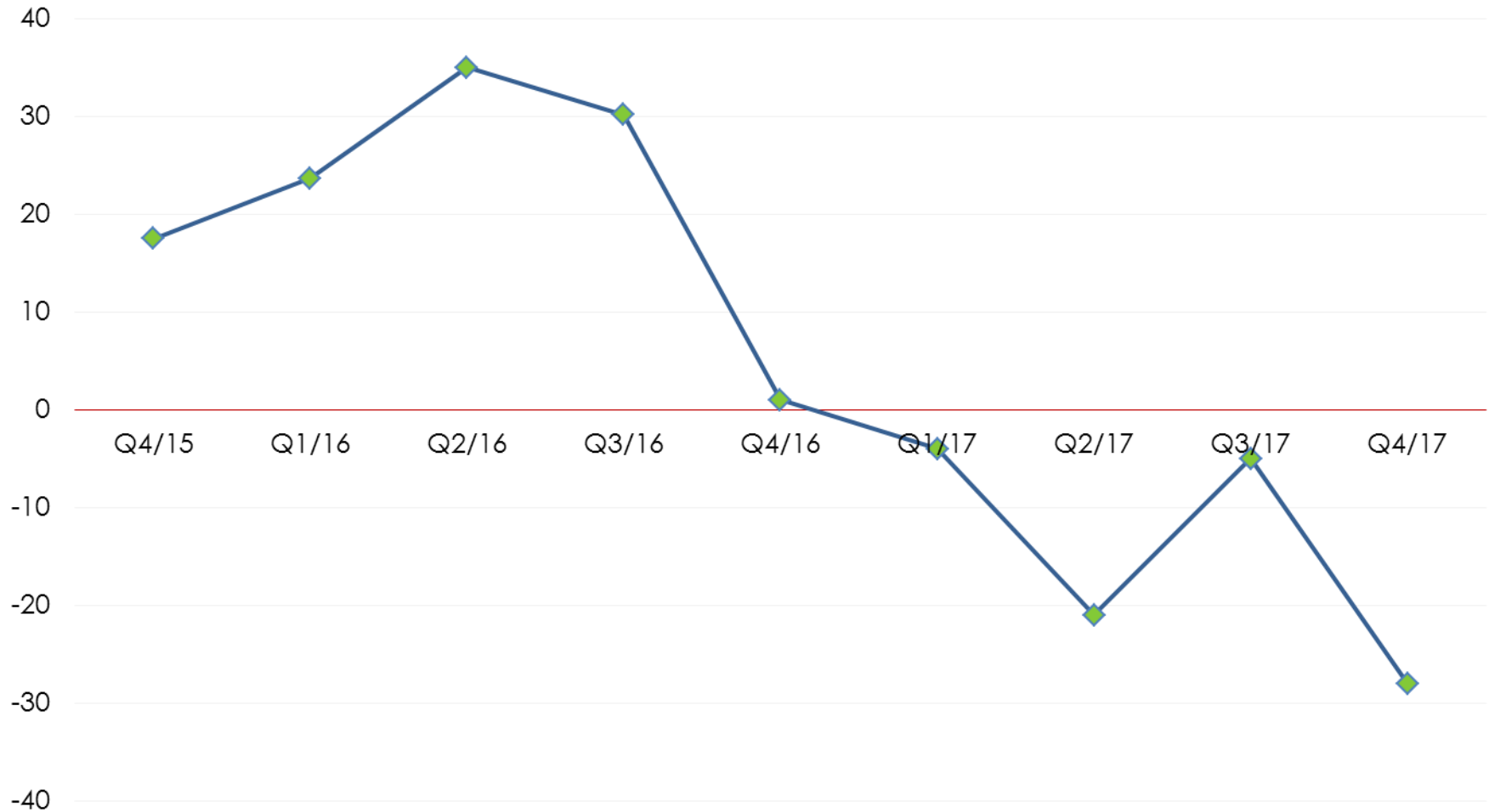
# Advertising Business Confidence Index Germany



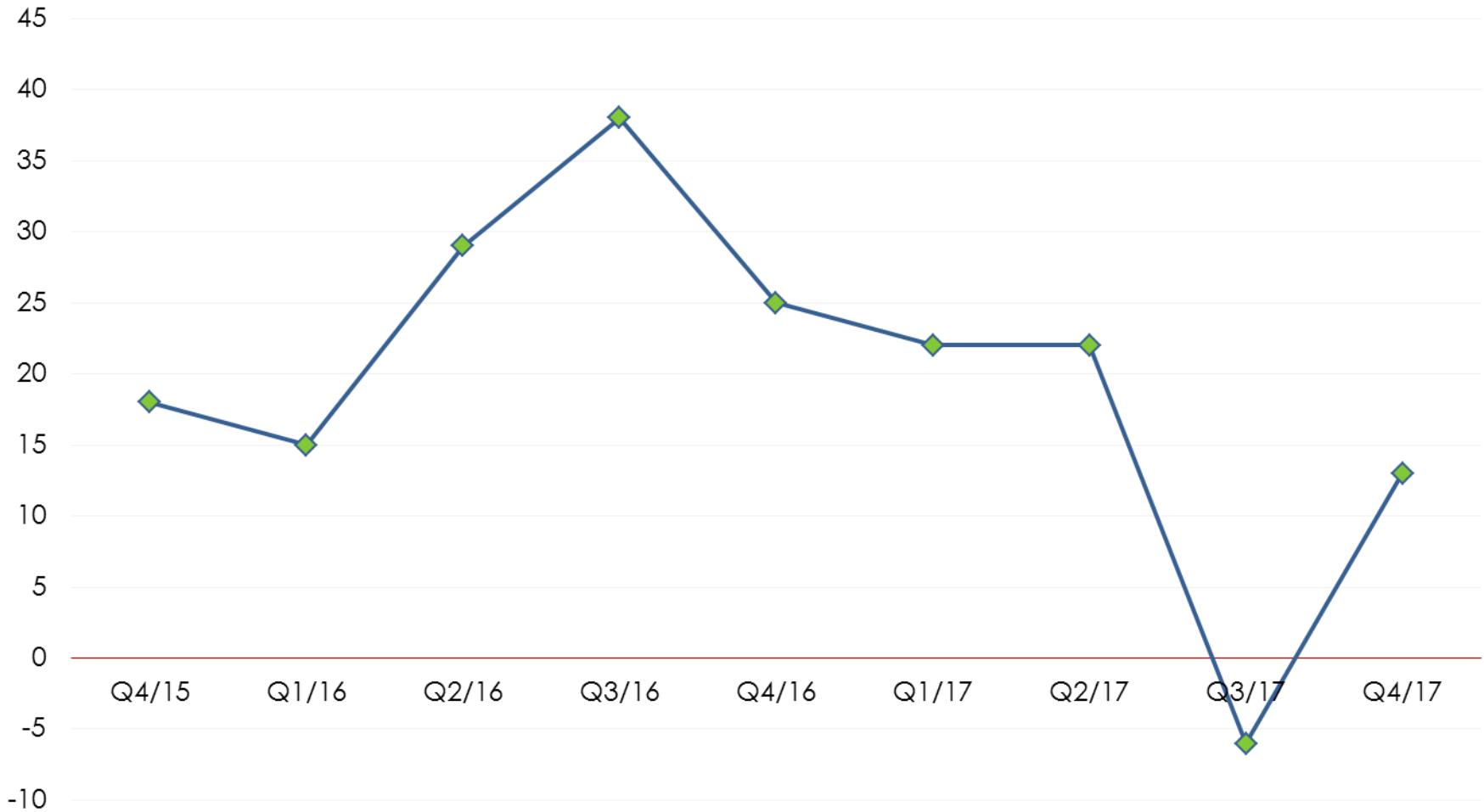


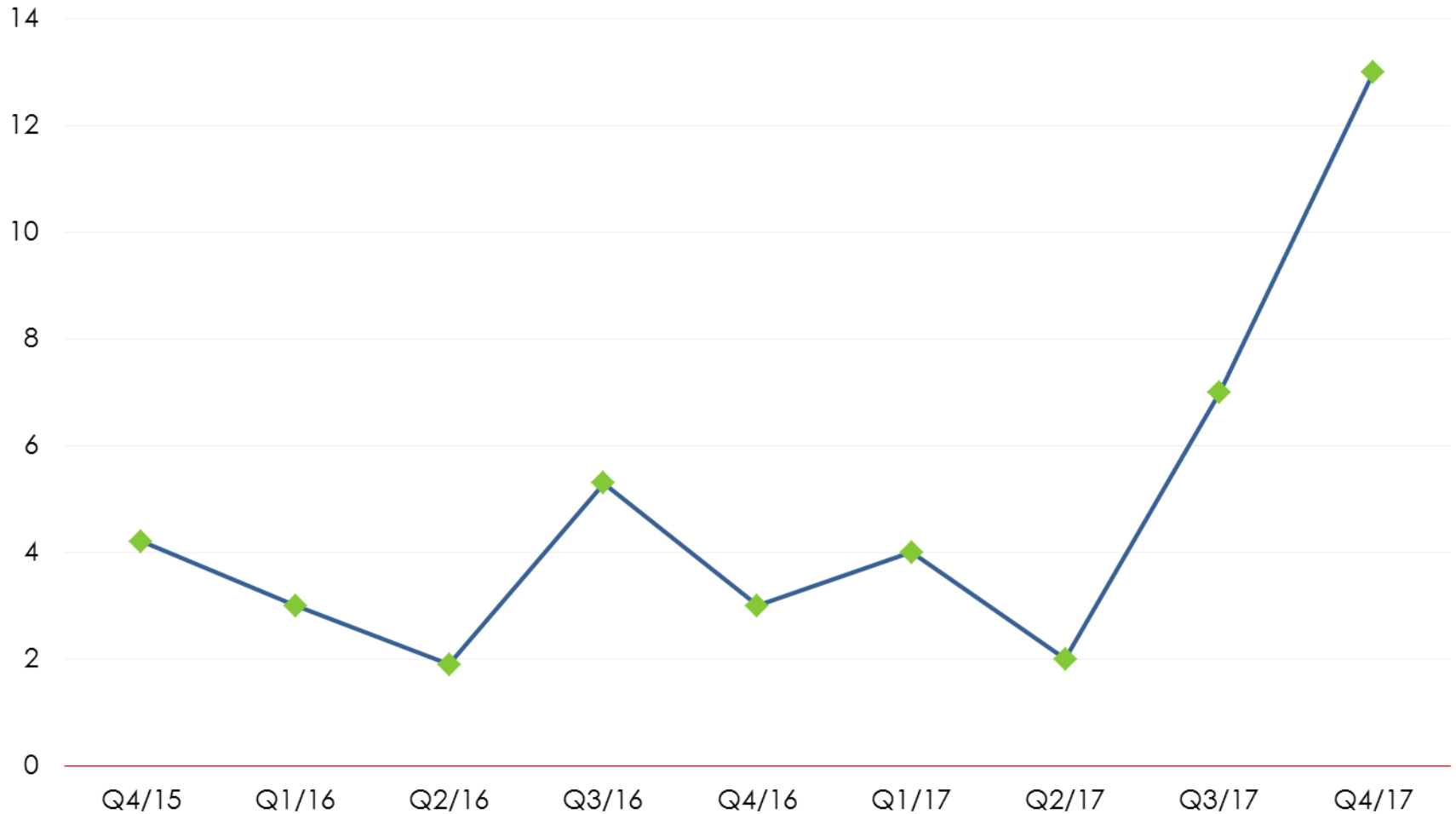


# Advertising Business Confidence Index Italy



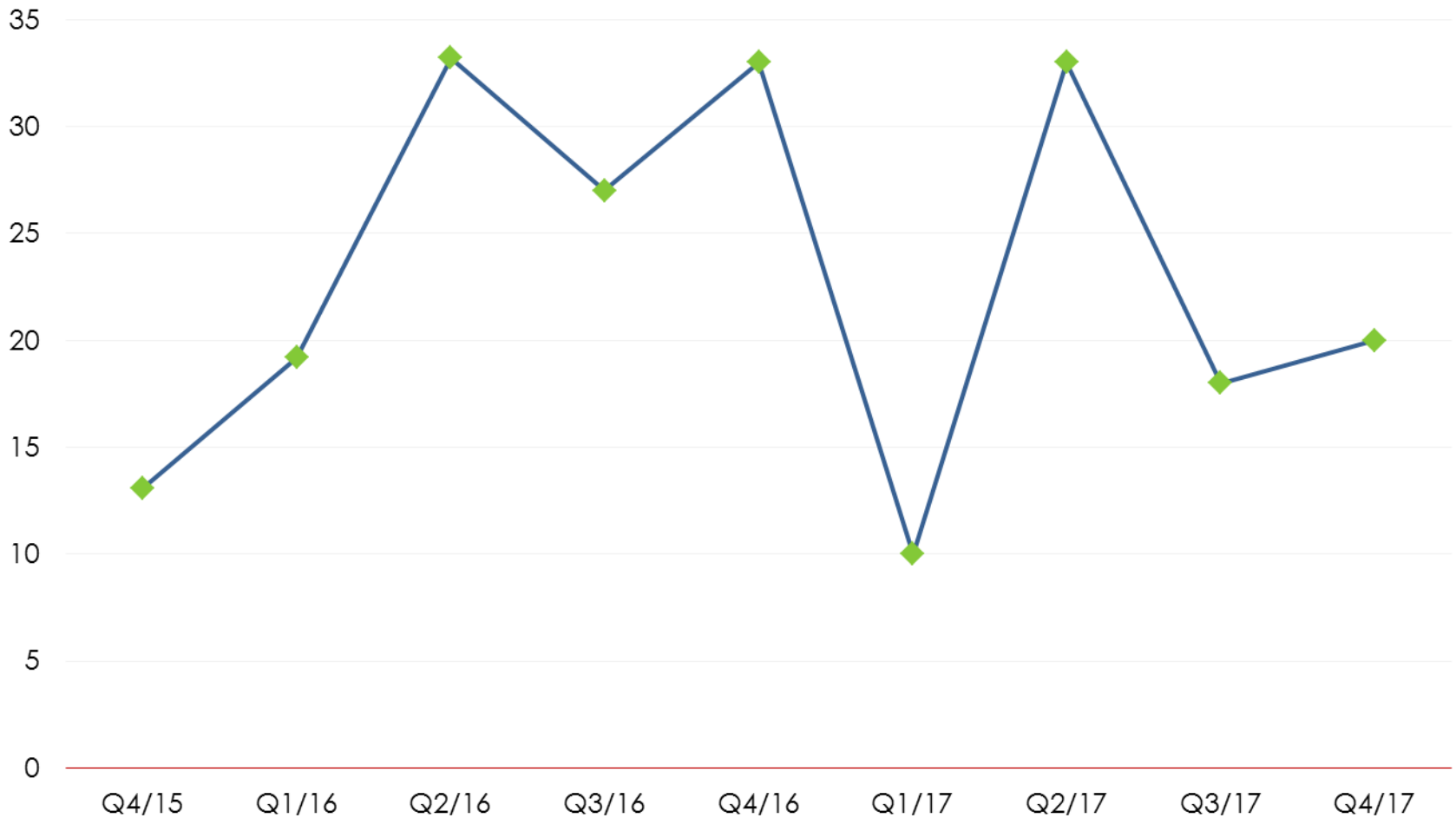








# Advertising Business Confidence Index Sweden





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