



EUROPEAN ASSOCIATION OF
COMMUNICATIONS AGENCIES

European Advertising Business Climate Index

Q1 – Q2/2018



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#AdIndex2018



- Quarterly survey of European advertising and market research companies
- Provides information about:
 - managers' assessment of their **business situation Q1/2018 & forecast for Q2/2018**
 - 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 Climate 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



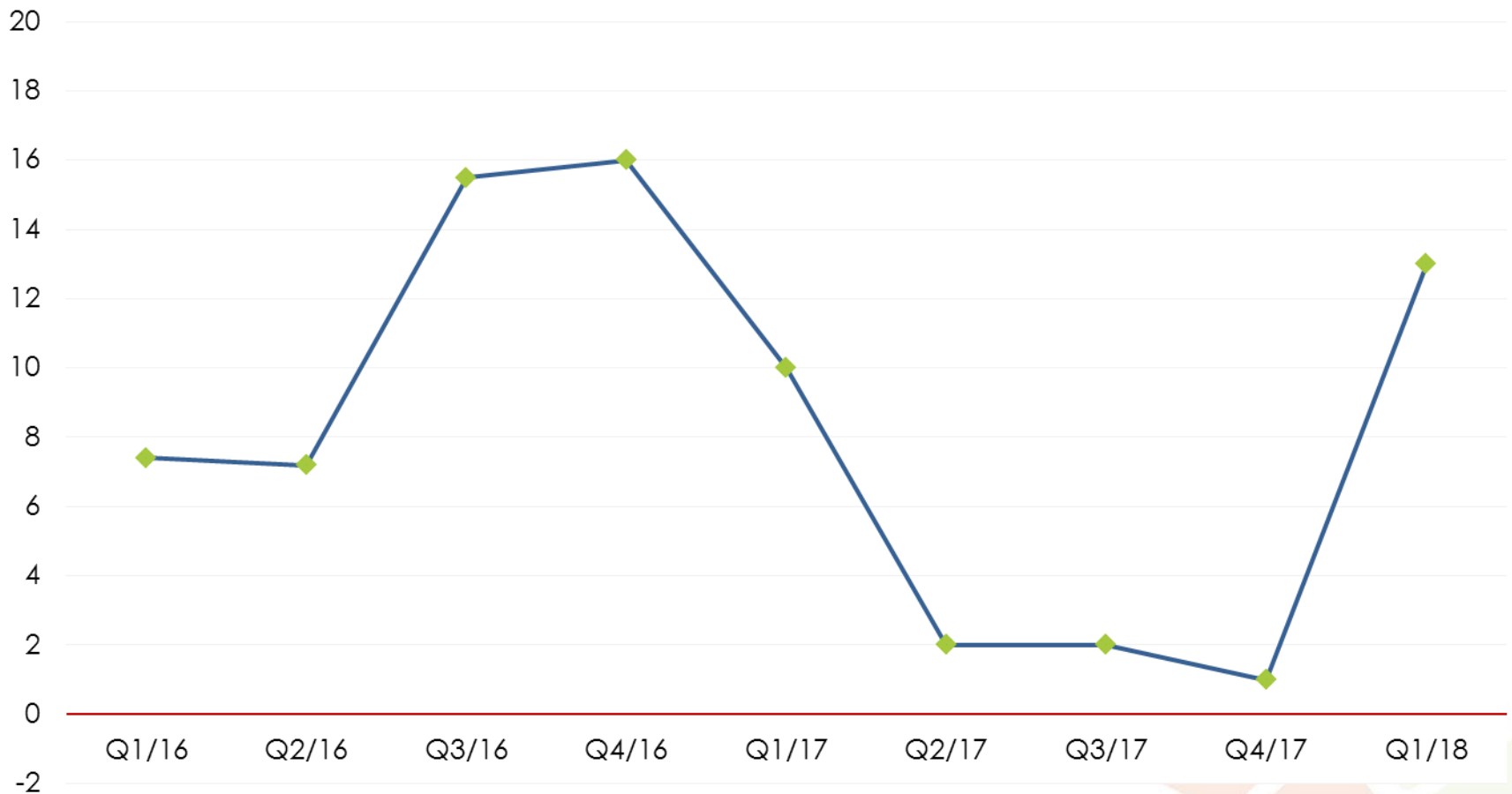
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- Survey carried out nationally by governments, central banks, trade bodies, research institutes, etc.
- **Questionnaire** and common timeline **harmonised by the European Commission (DG ECOFIN)**
- Nominal EU services sample size exceeds **43,000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

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

% of positive answers – % of negative answers

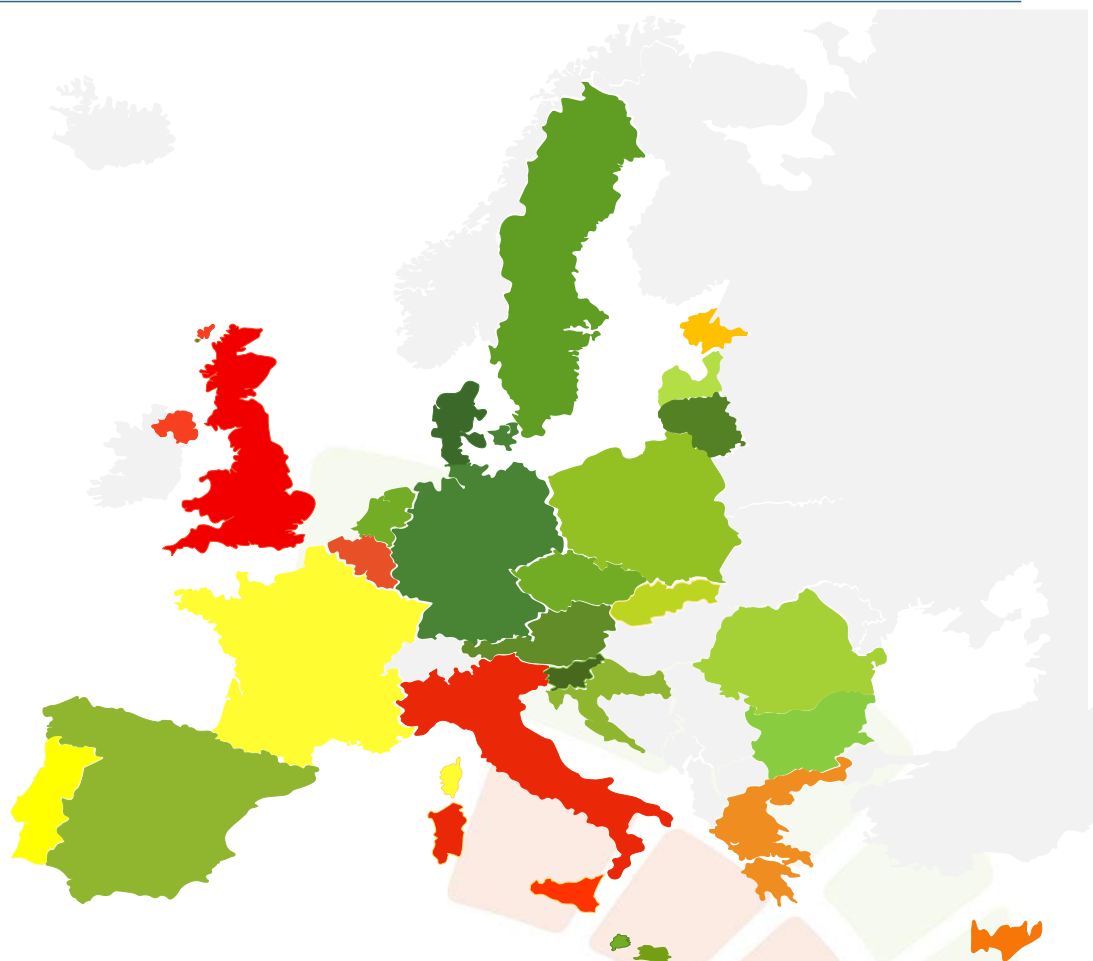




Austria: 23	Italy: -28
Belgium: -17	Latvia: 8
Bulgaria: 14	Lithuania: 28
Czech Republic: 19	Malta: 17
Denmark: 33	Netherlands: 16
Germany: 26	Poland: 13
Estonia: -4	Portugal: 0
Greece: -10	Romania: 12
Spain: 13	Slovenia: 31
France: 1	Slovakia: 10
Croatia: 13	Sweden: 20
Cyprus: -13	United Kingdom: -26,2



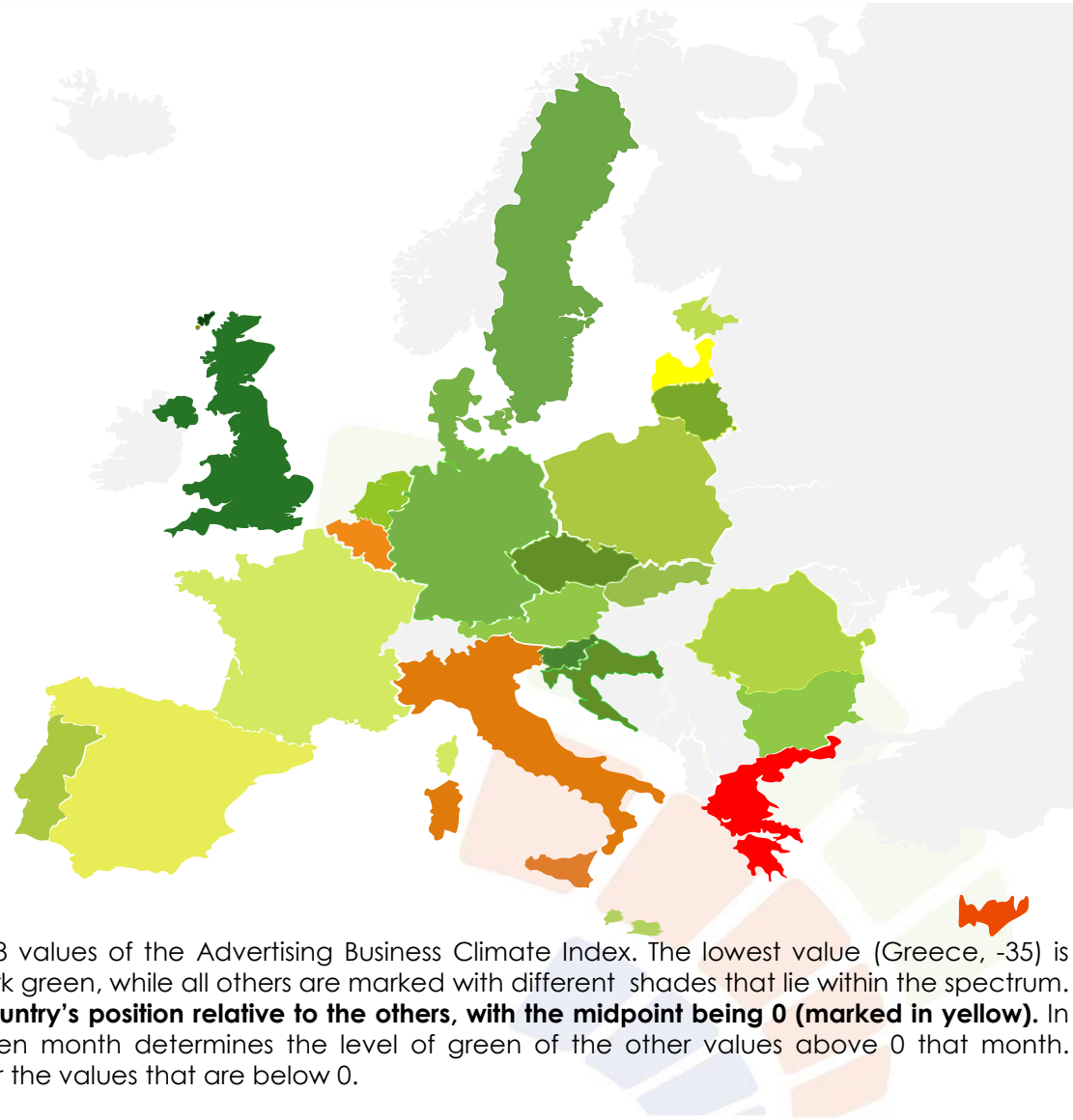
Lowest → Highest



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The colour codes for each country are based on January 2018 values of the Advertising Business Climate 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.

Austria: 14	Italy: -18
Belgium: -14	Latvia: 0
Bulgaria: 14	Lithuania: 21
Czech Republic: 23	Malta: 11
Denmark: 18	Netherlands: 15
Germany: 18	Poland: 11
Estonia: 8	Portugal: 11
Greece: -35	Romania: 10
Spain: 3	Slovenia: 28
France: 4	Slovakia: 18
Croatia: 23	Sweden: 22
Cyprus: -25	United Kingdom: 49,2



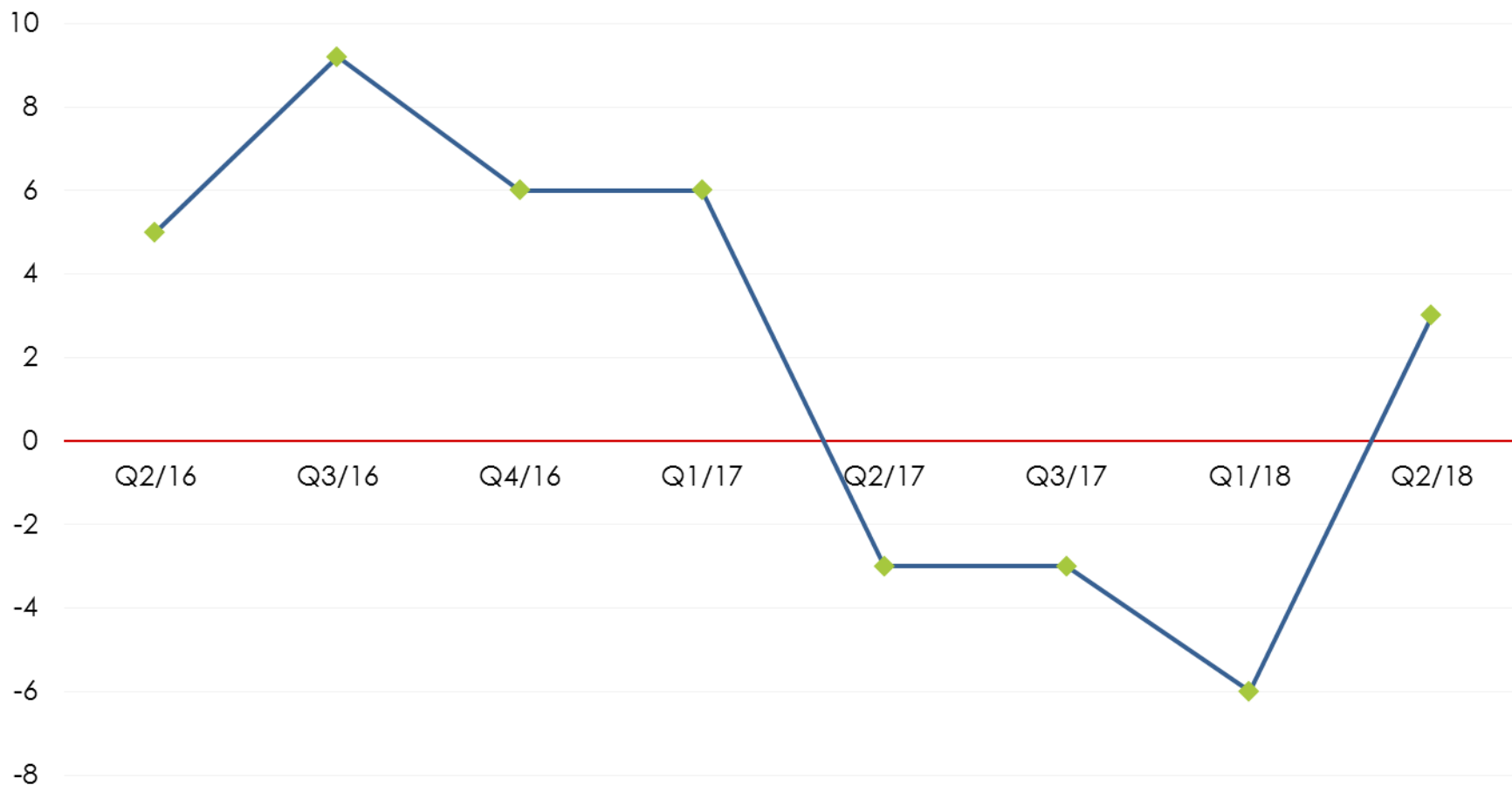
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The colour codes for each country are based on April 2018 values of the Advertising Business Climate Index. The lowest value (Greece, -35) is highlighted in red and the highest value (the UK, +49,2) in dark green, while all others are marked with different 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.



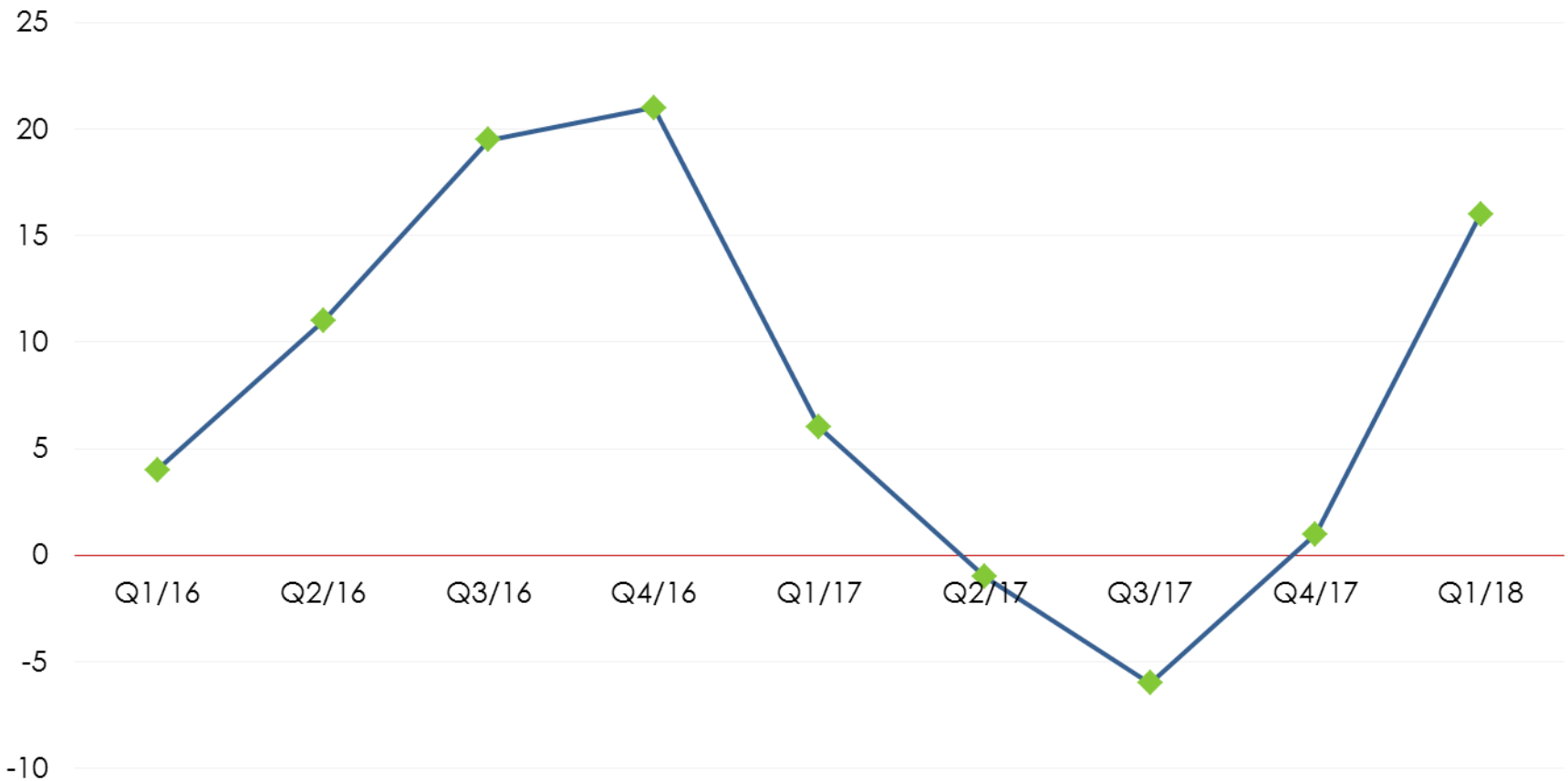
Business development over the past 3 months

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



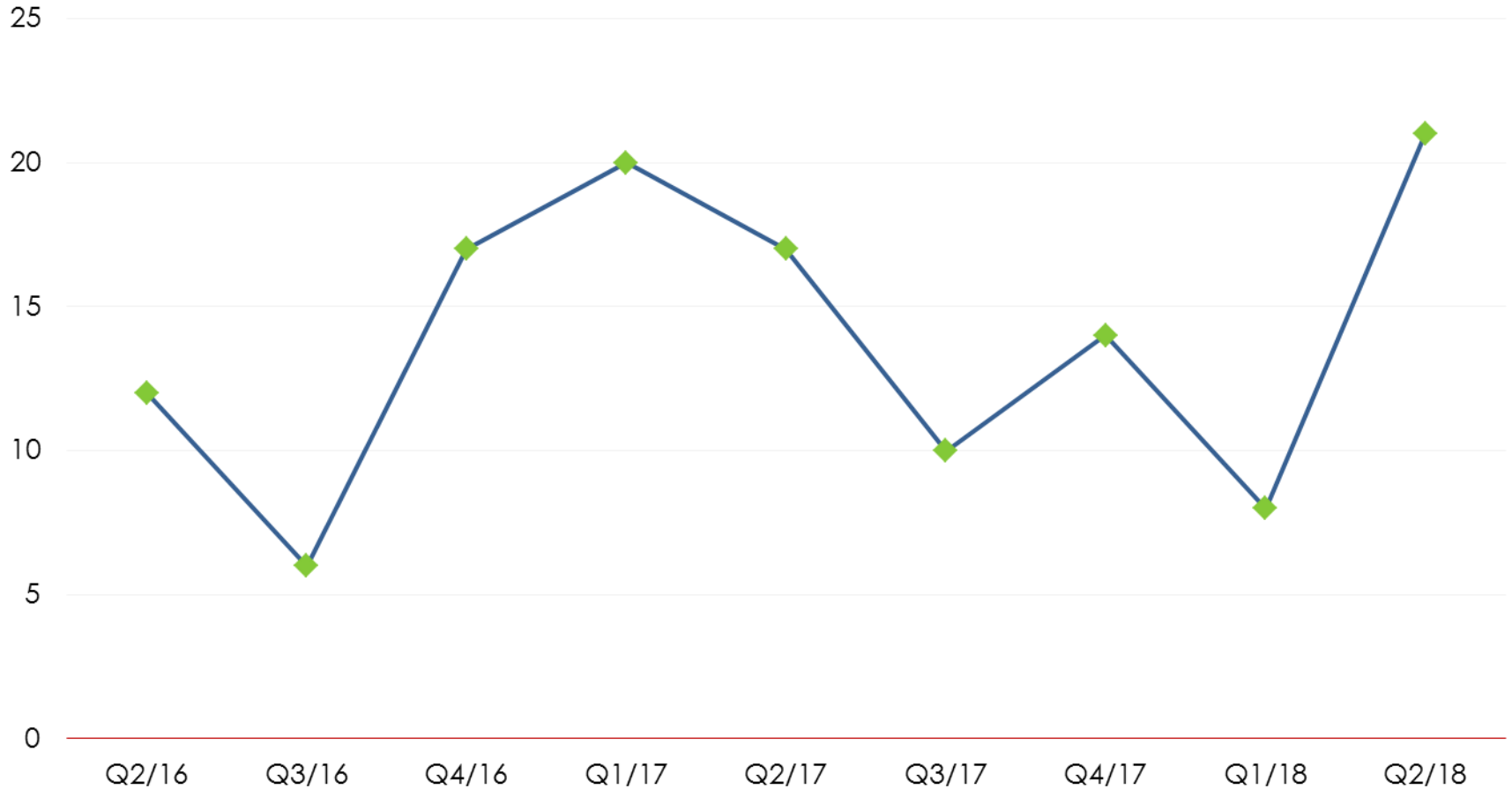
Evolution of demand for advertising services over the past 3 months

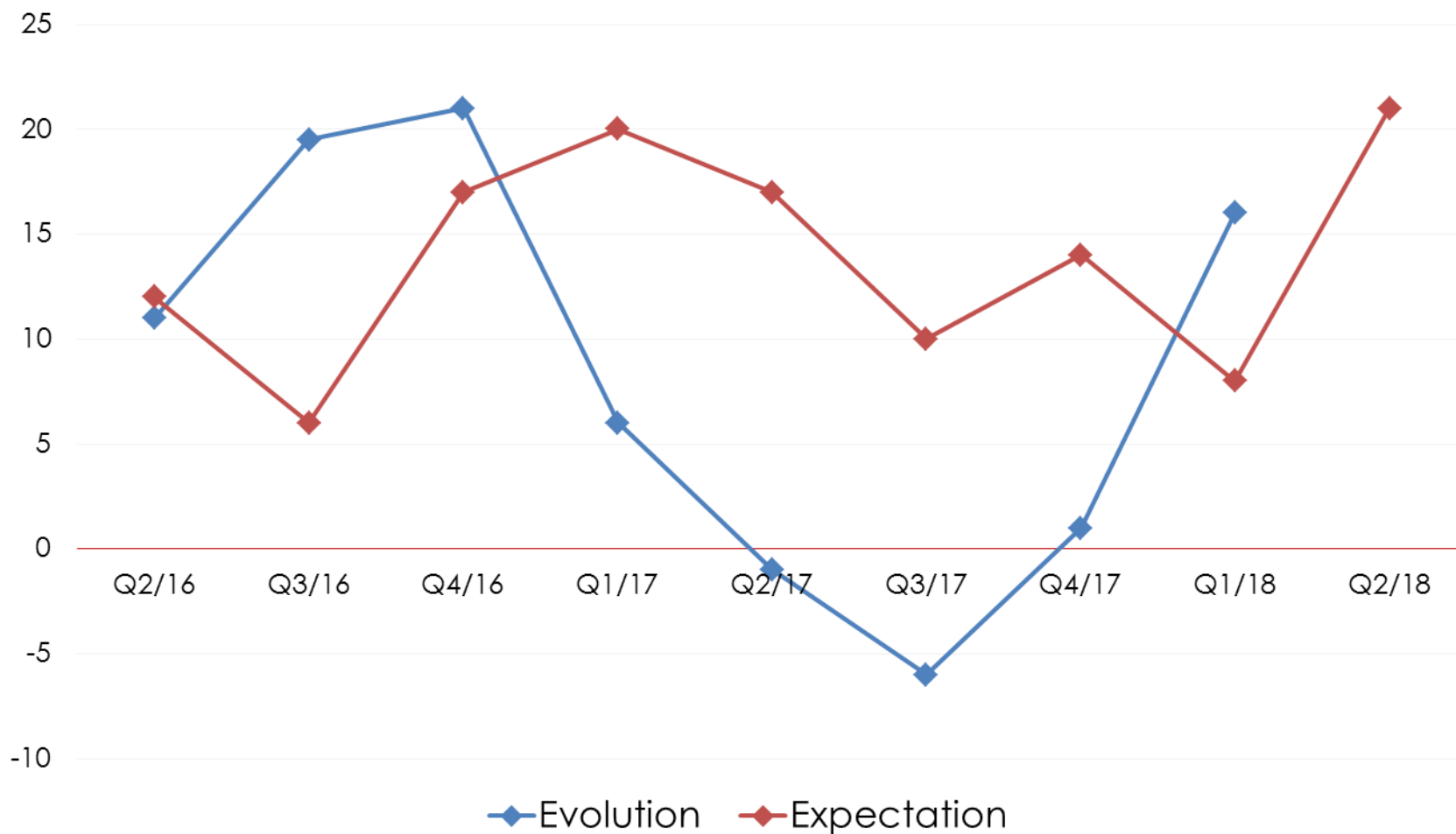
How has your demand (turnover) for your company's services changed over the past 3 months?



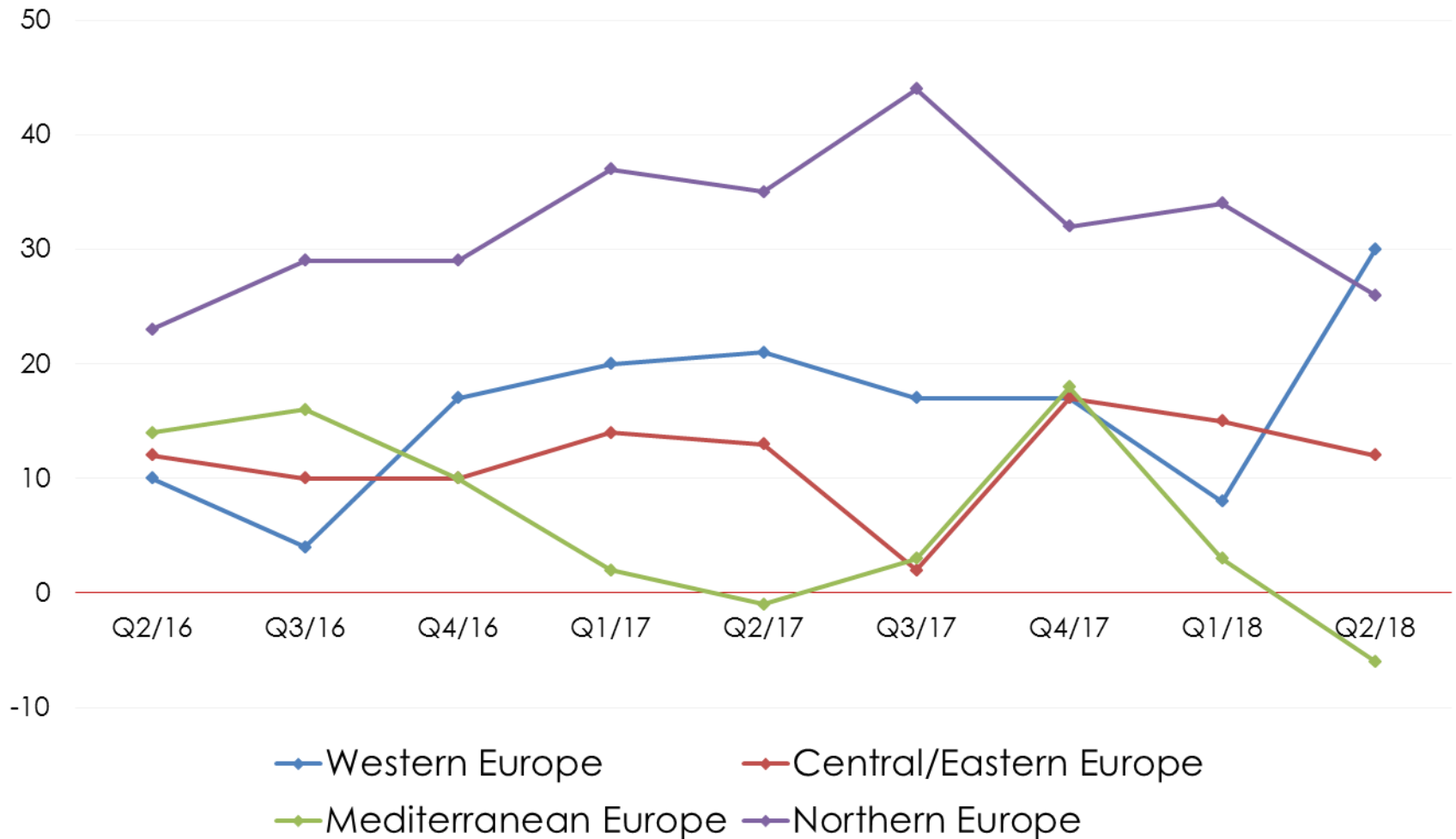
Expectation of advertising demand over the next 3 months

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



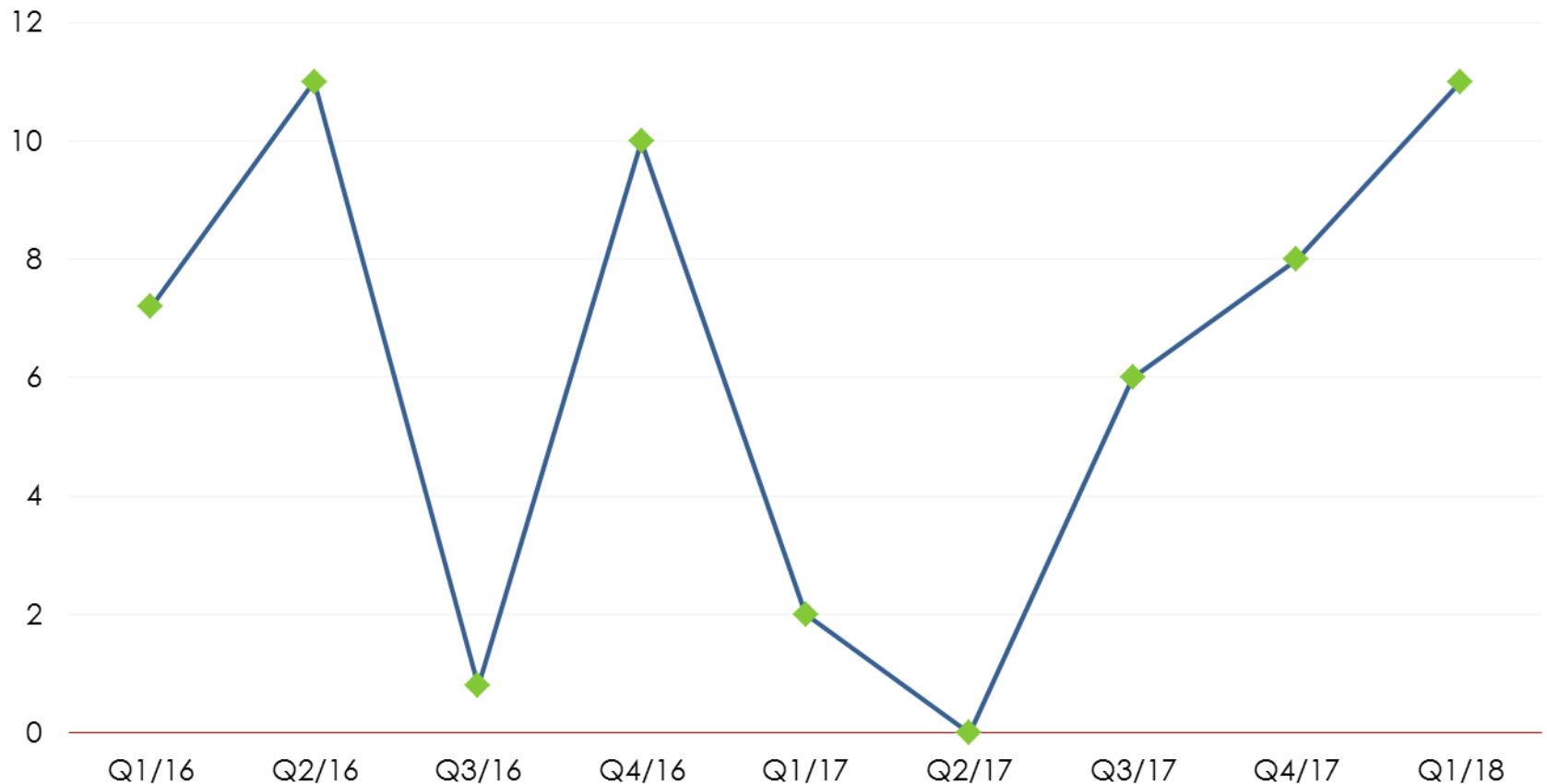


Expectations of advertising demand over the next 3 months



Evolution of employment over the past 3 months

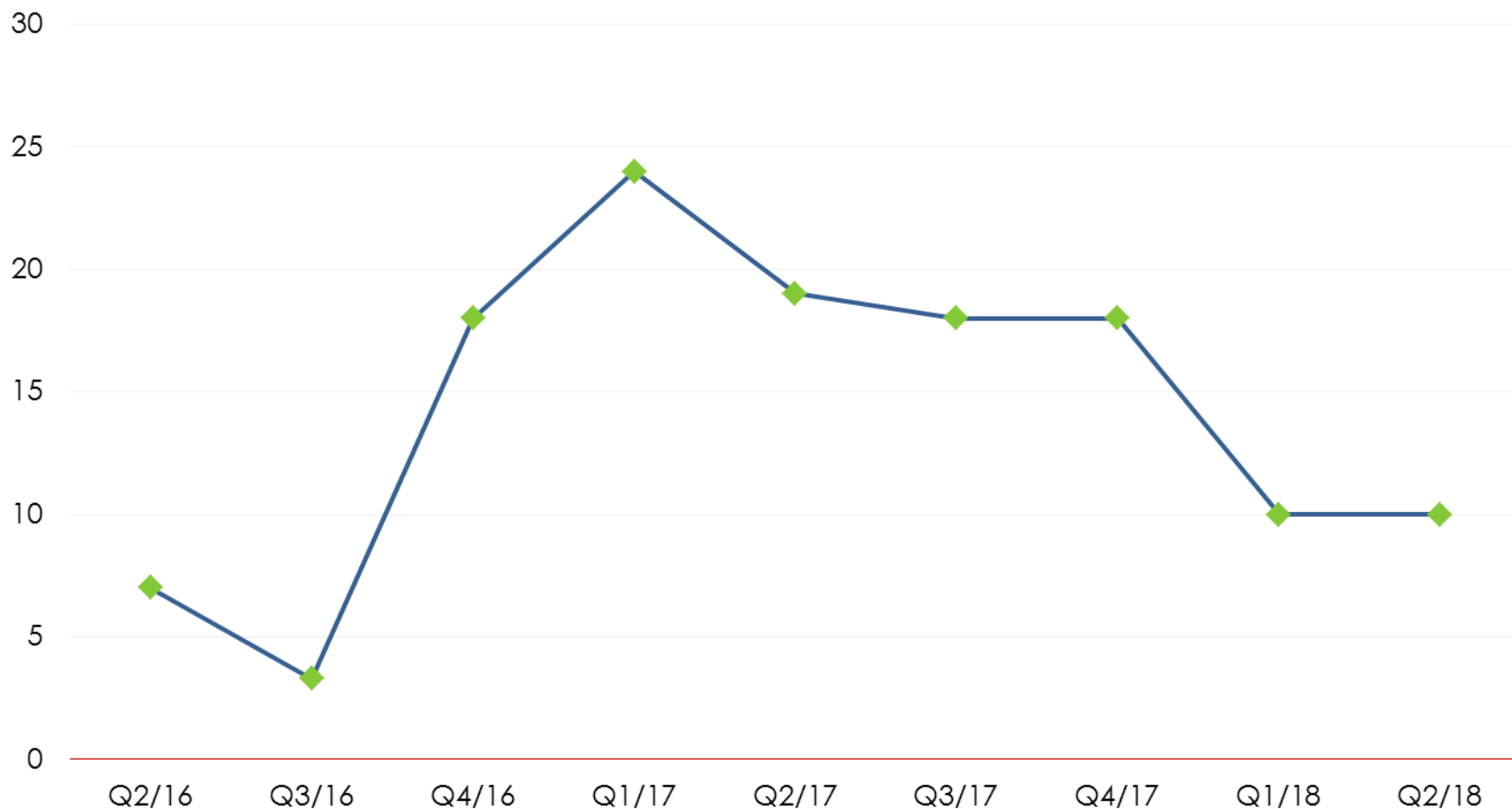
How has your company's total employment changed over the past 3 months?

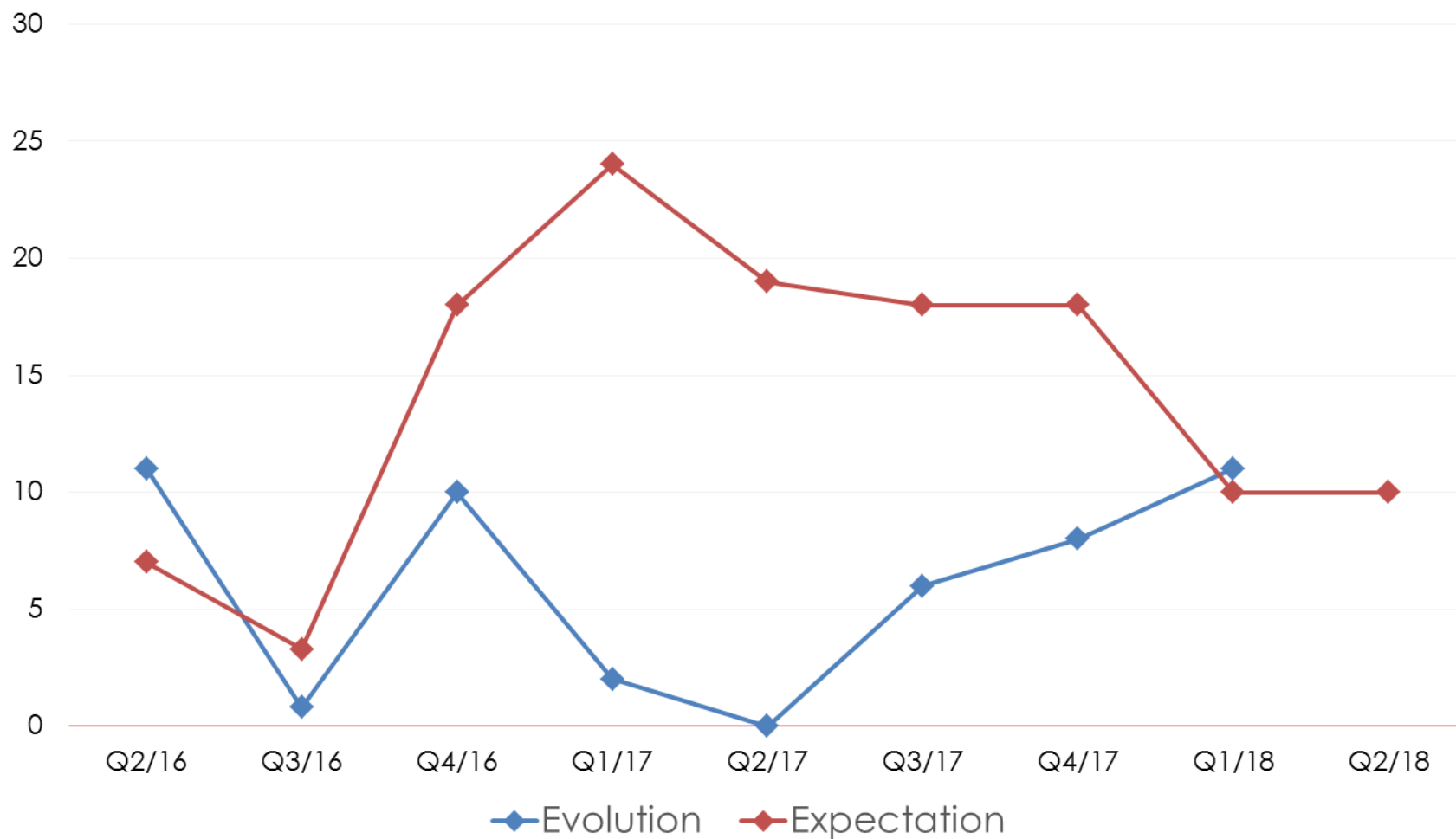


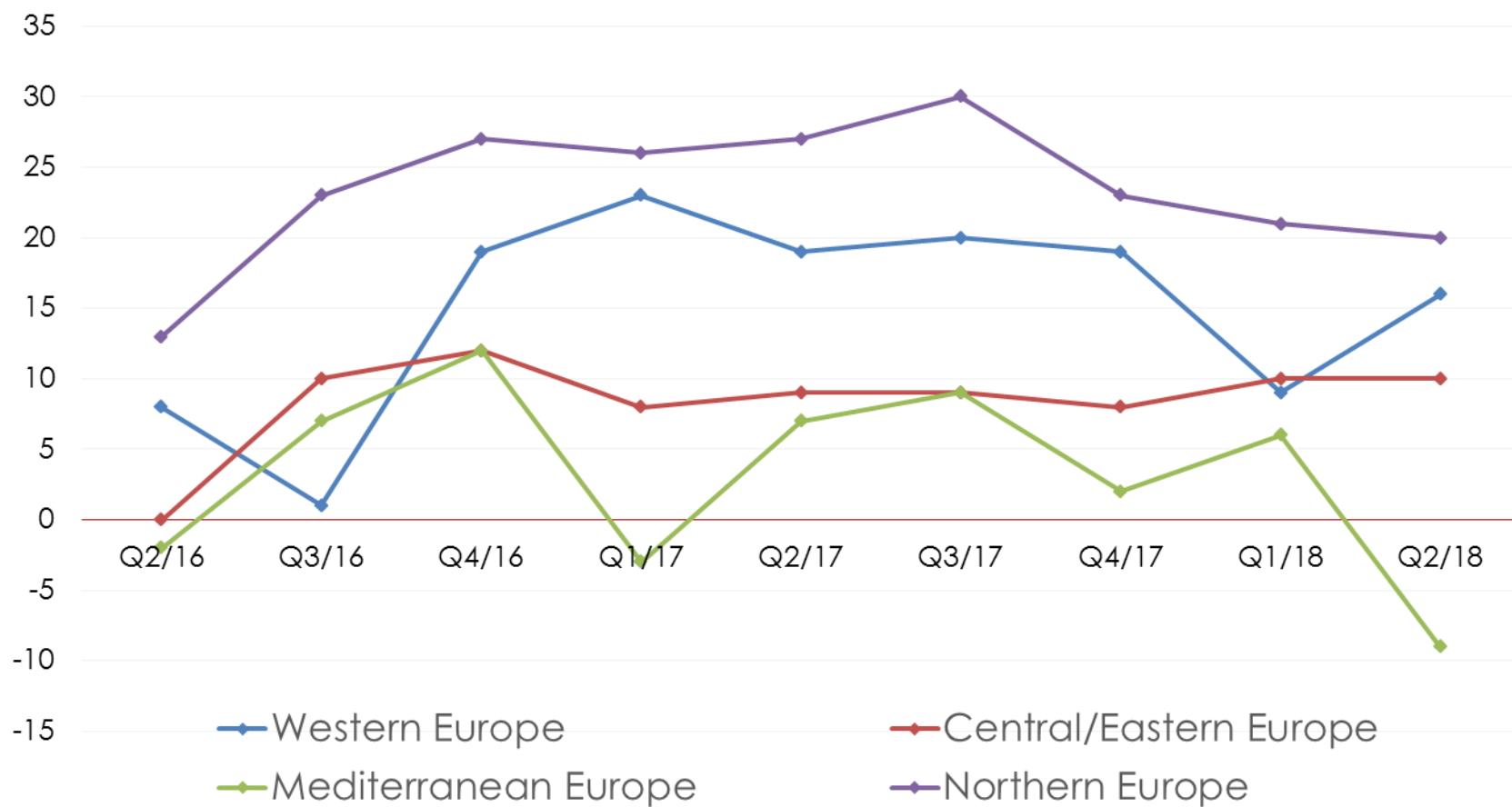


Expectation of employment over the next 3 months

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

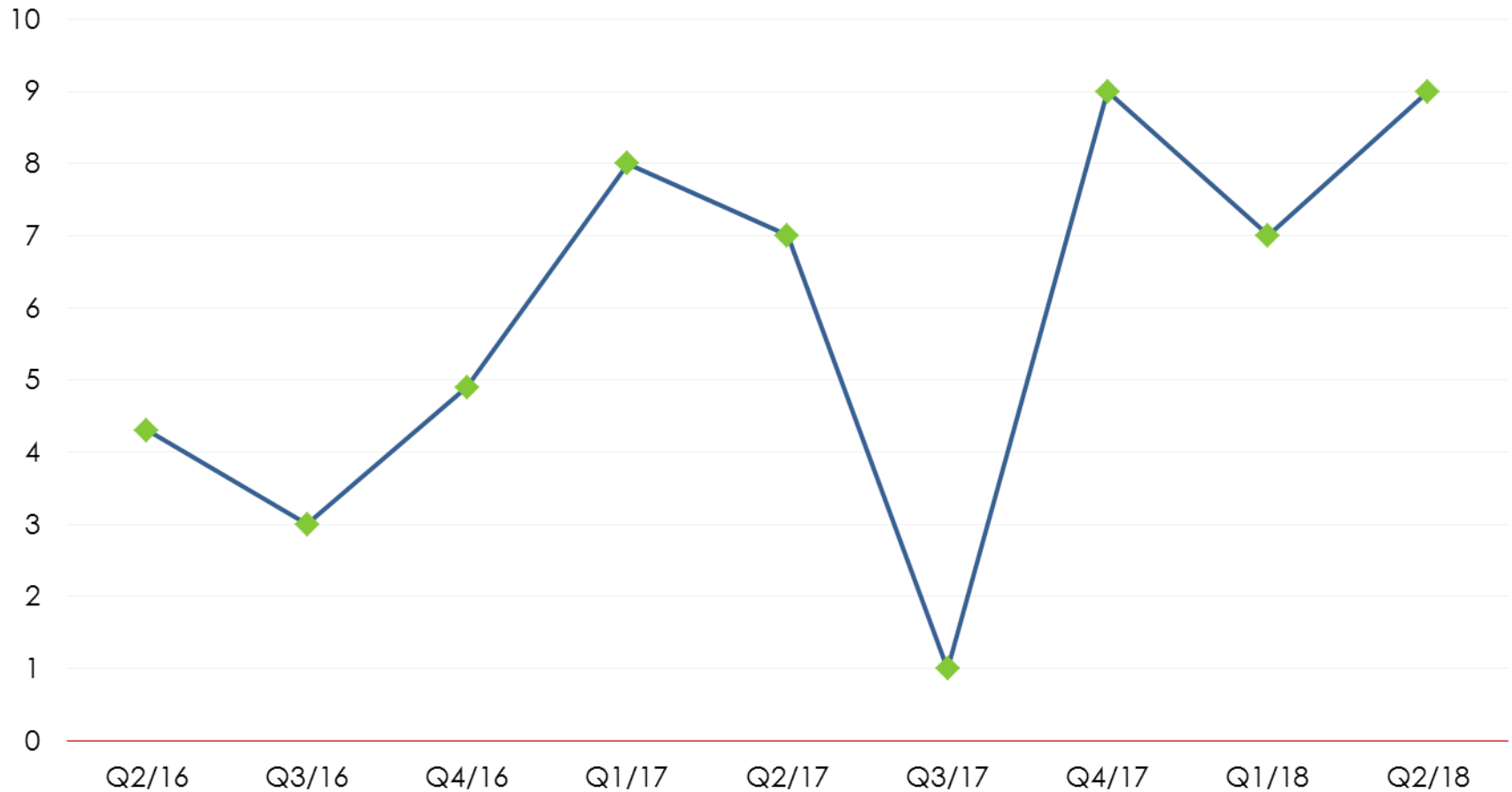




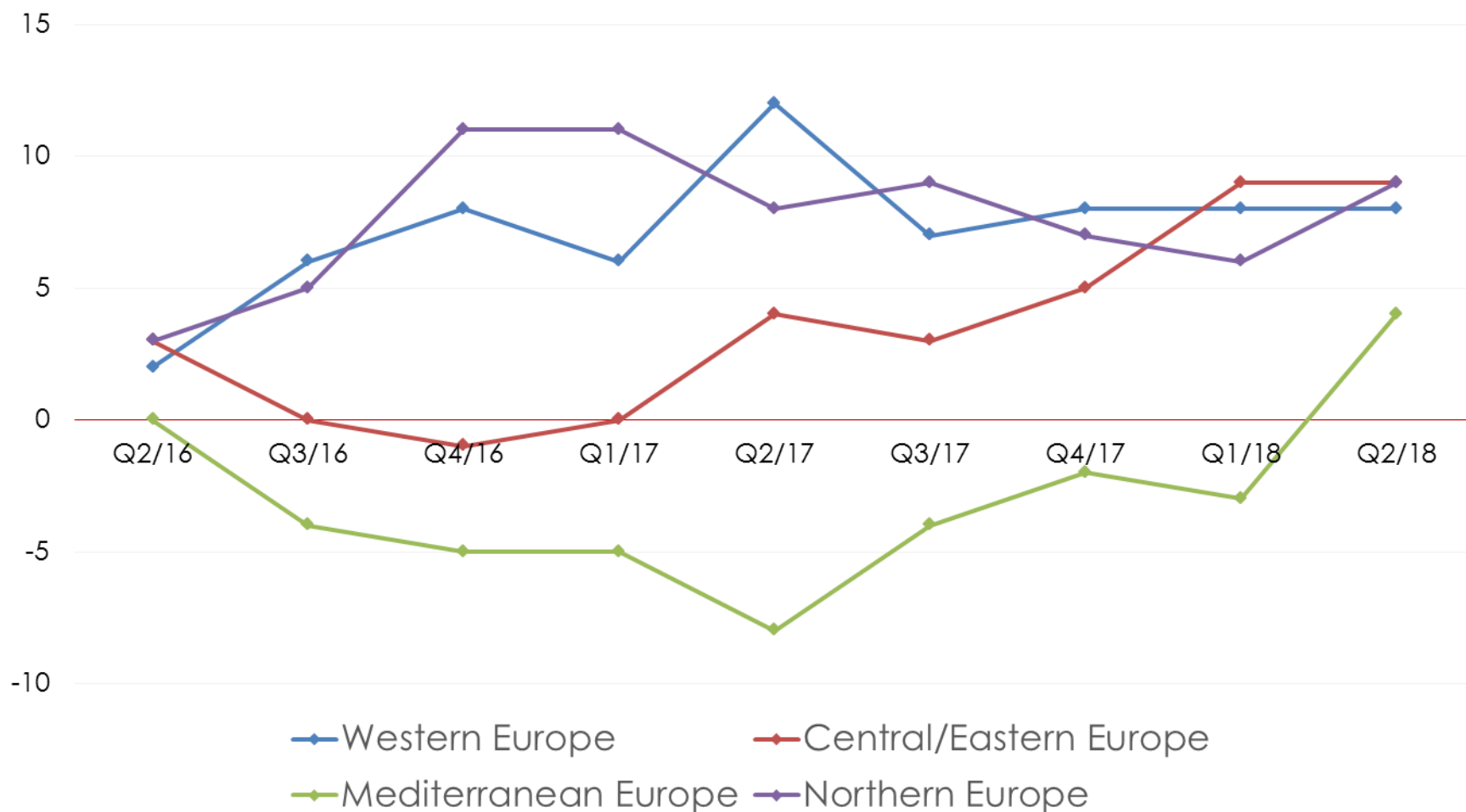


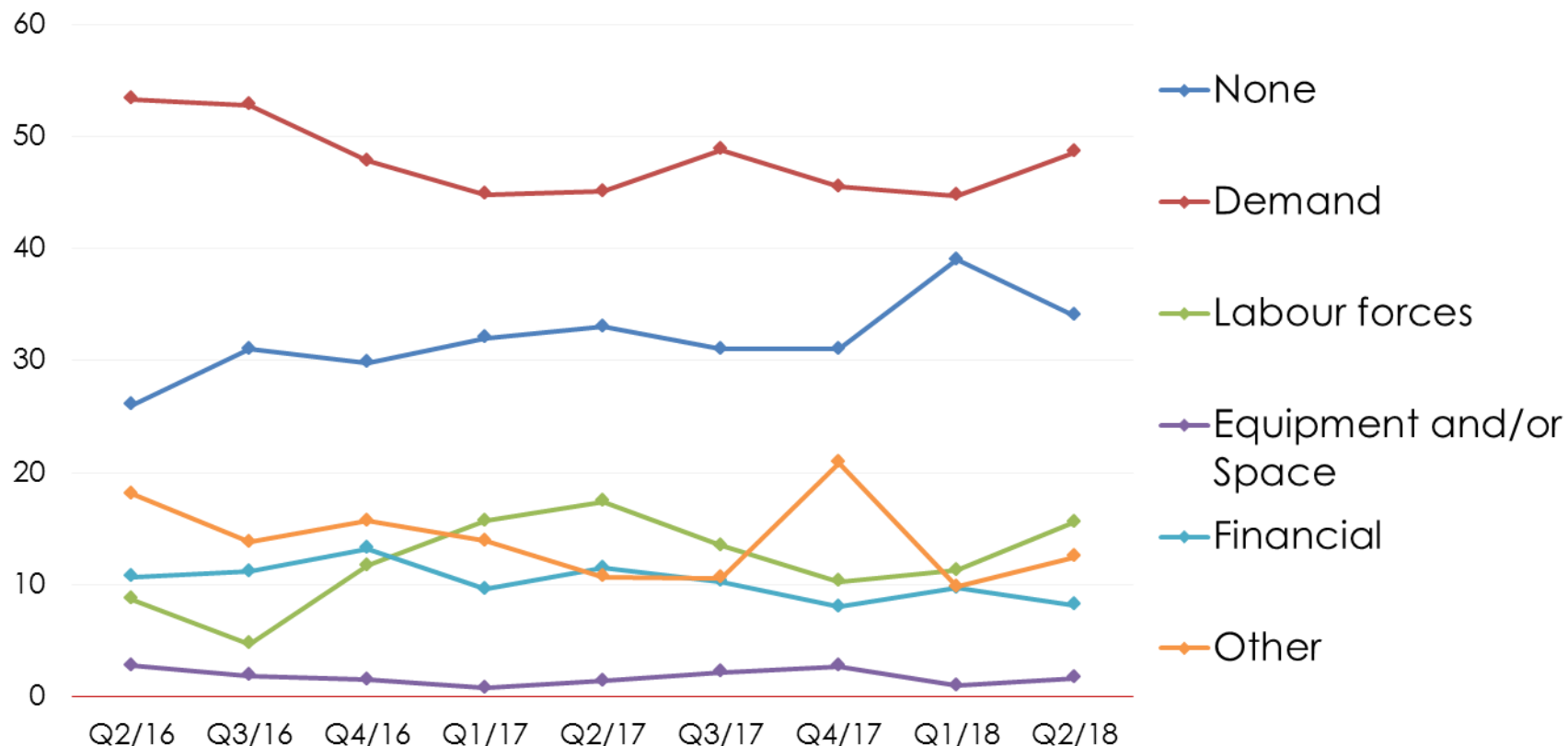
Expectation of selling prices over the next 3 months

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



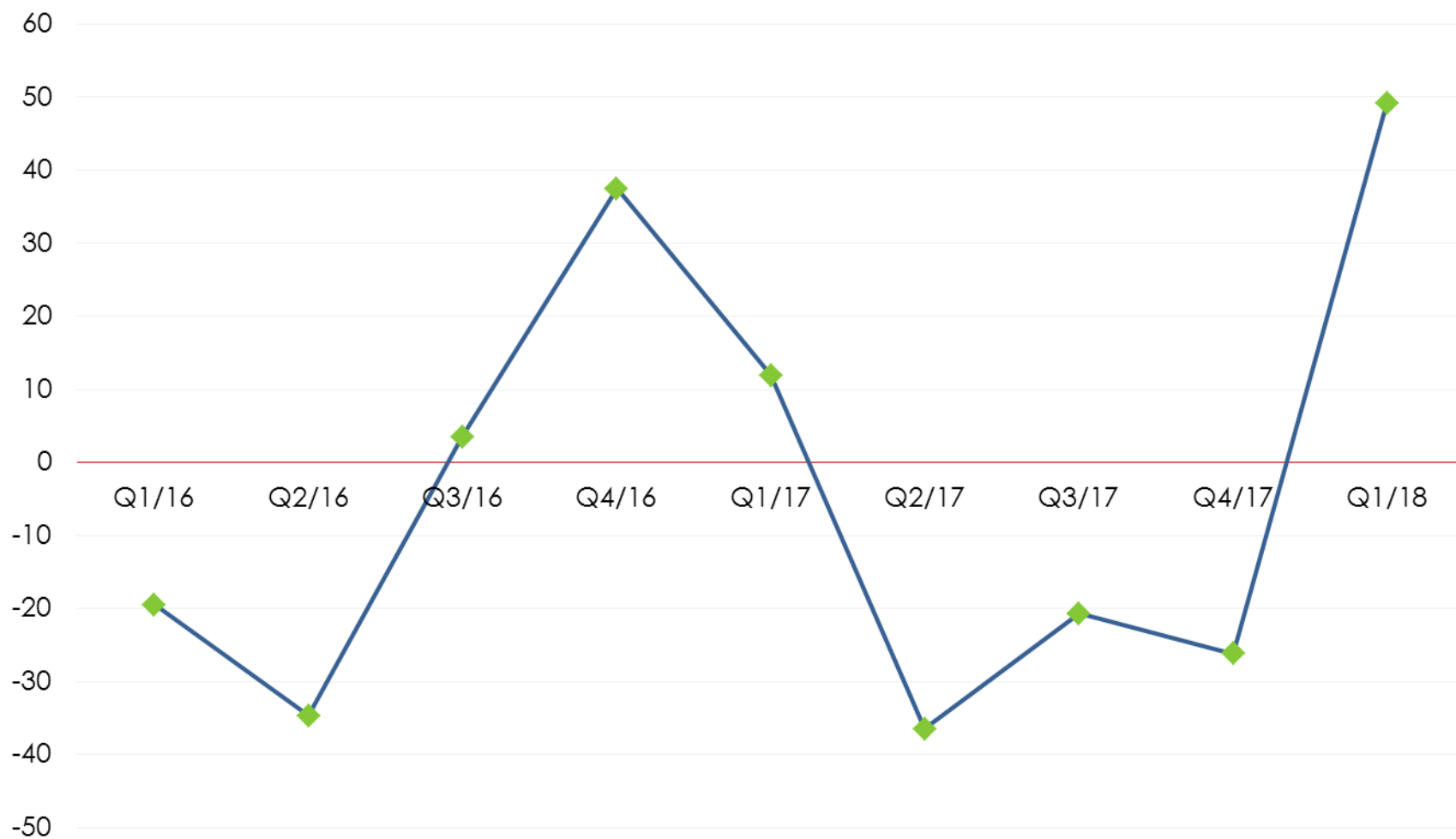
Expectation of selling prices over the next 3 months

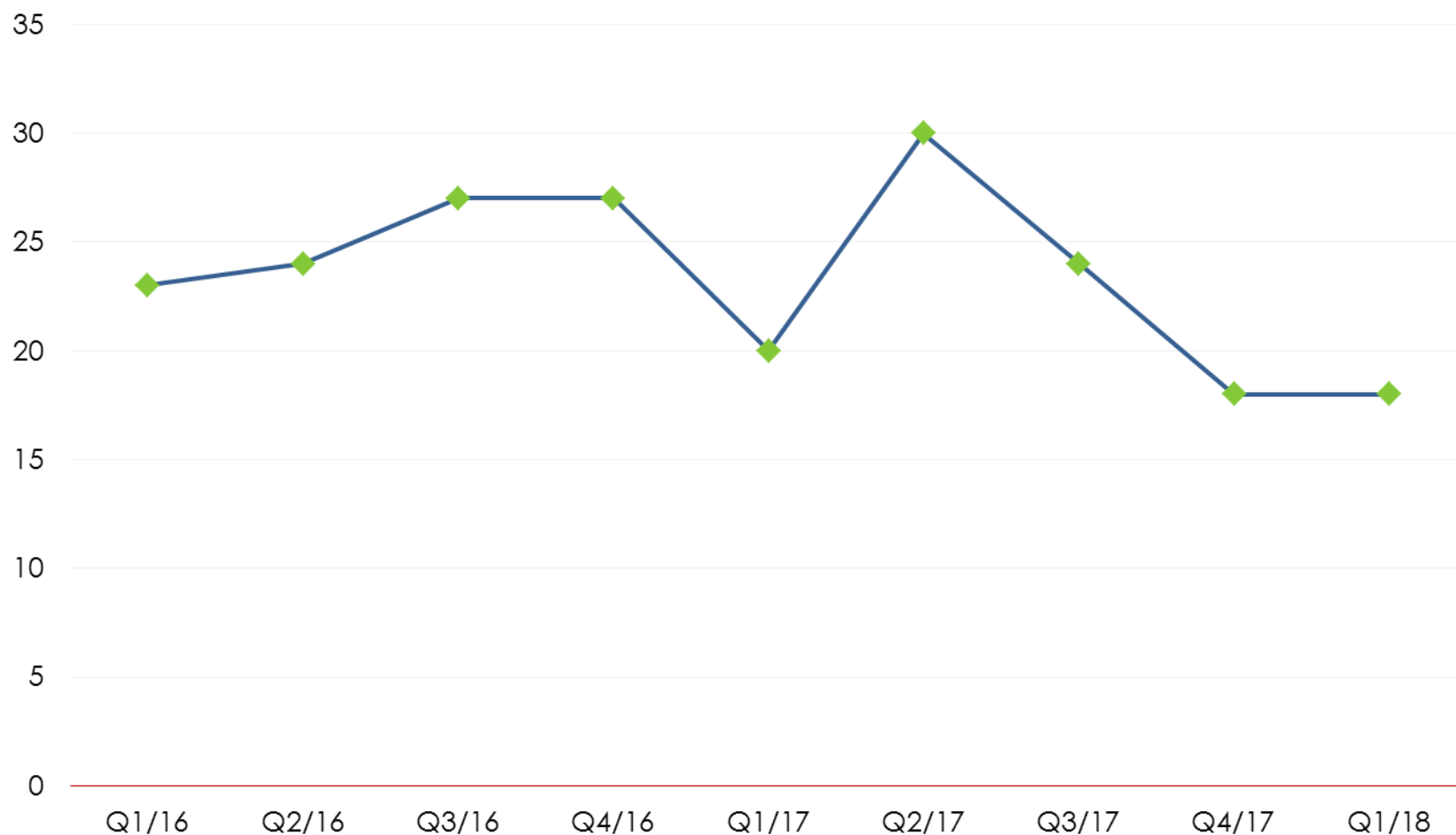


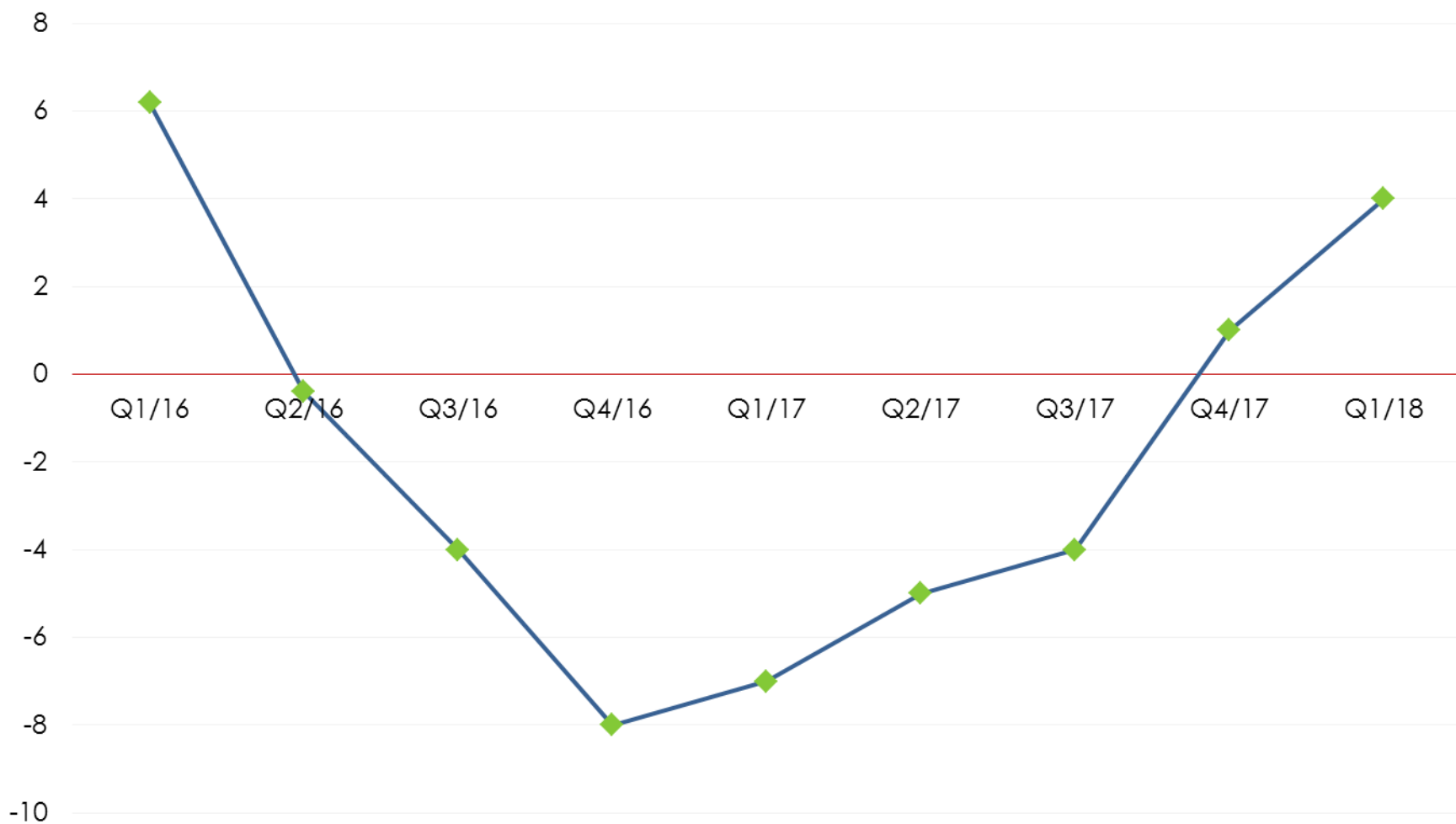


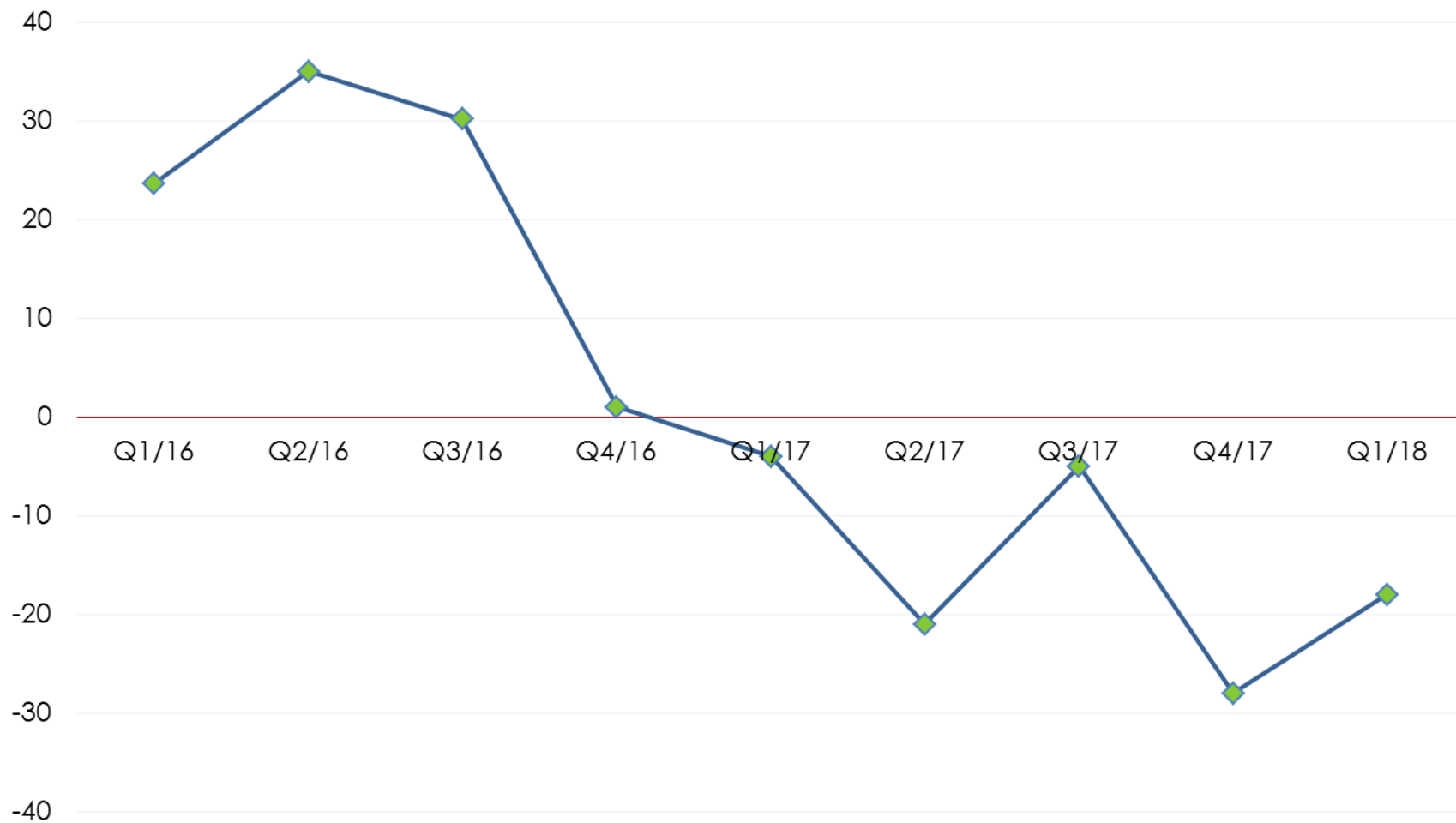
Country-specific graphs

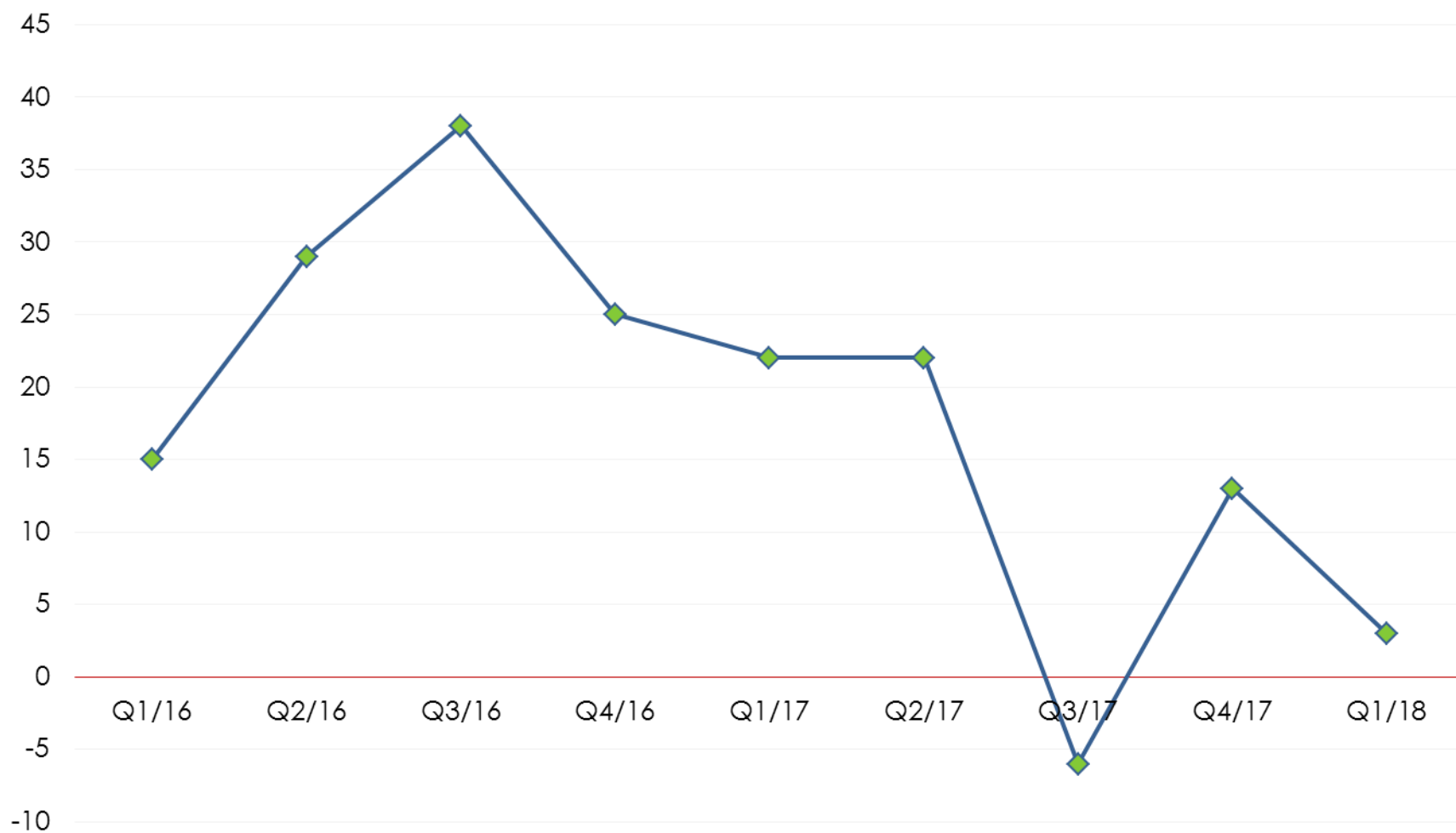


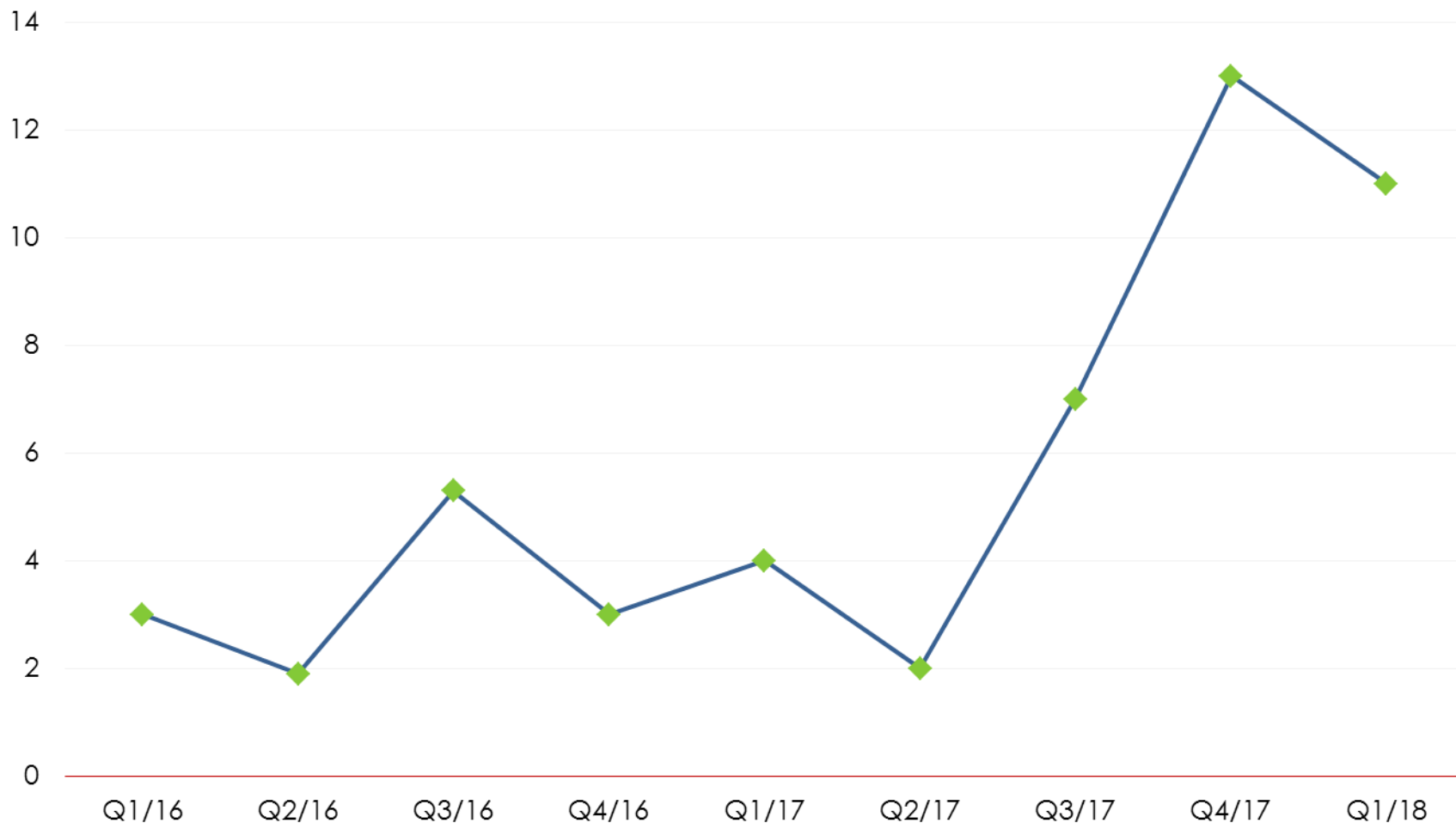




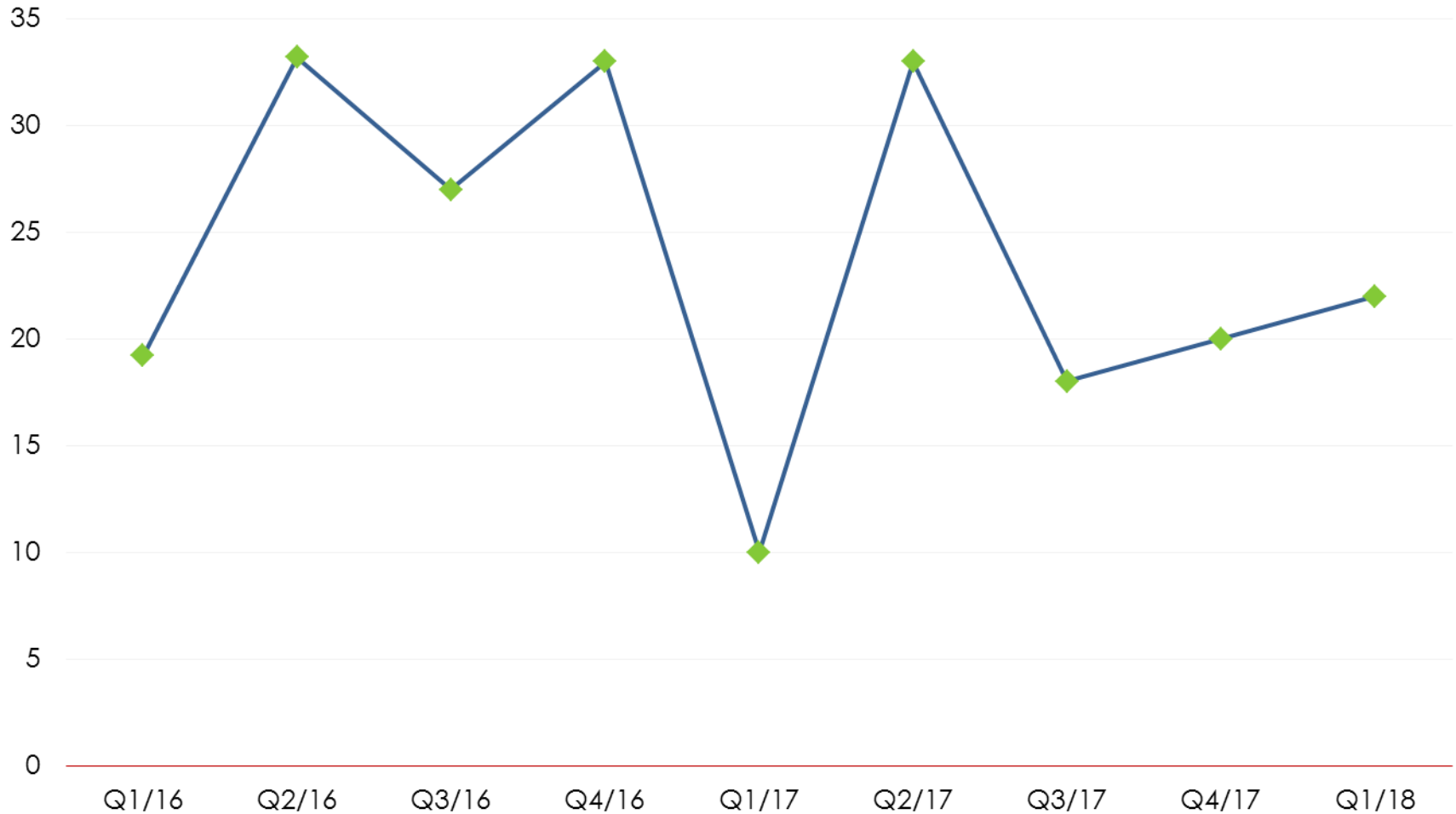








Advertising Business Climate Index Sweden





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