



EUROPEAN ASSOCIATION OF
COMMUNICATIONS AGENCIES

European Advertising Business Climate Index

Q2 – Q3/2018



@eaca_eu

#AdIndex2018





ABOUT

- Quarterly survey of European advertising and market research companies
- Provides information about:
 - managers' assessment of their **business situation Q2/2018 & forecast for Q3/2018**
 - past and future **challenges in companies' turnover**
 - Anticipated **employment and revenue levels**



@eaca_eu #AdIndex2018



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



@eaca_eu #AdIndex2018

- 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

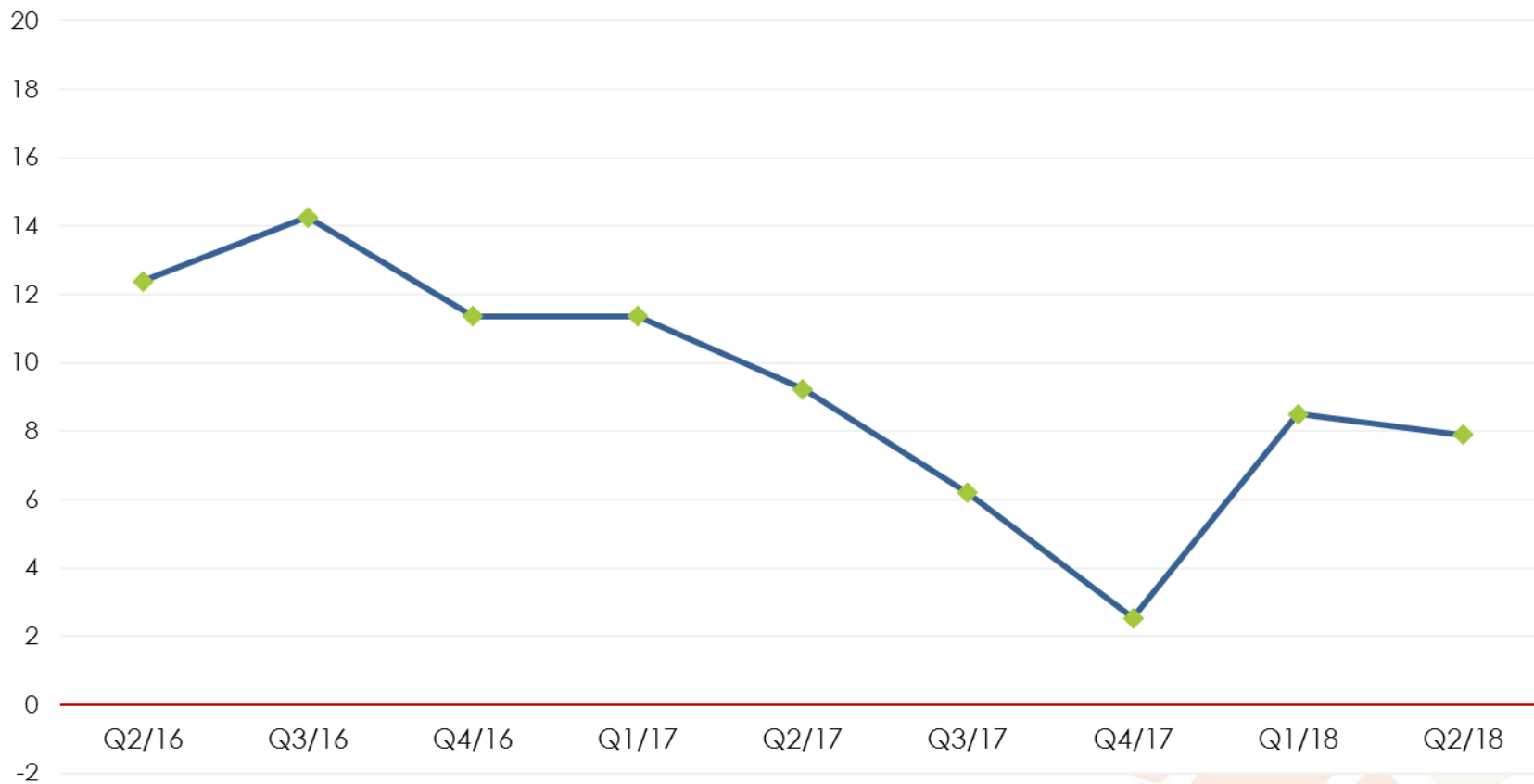


- **Revised methodology** as opposed to the previous reports (2016 – until now):
 - Instead of using the data of every third month of the Advertising Business Climate Index, each point now represents the average values of three months to reflect a quarter. Whenever levels are compared to previous ones, these have been adjusted to the new methodology.

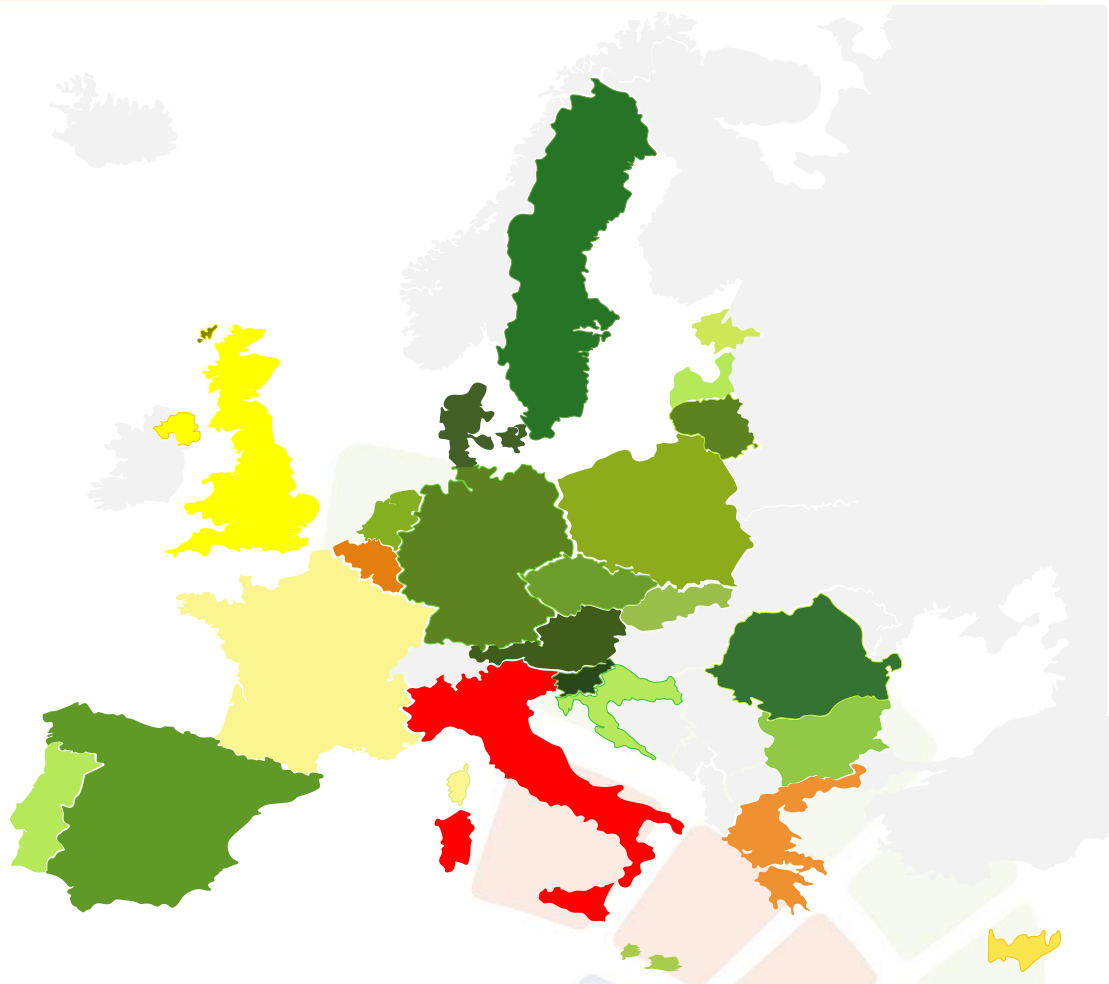
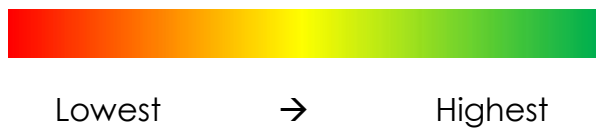




Advertising Business Climate Index



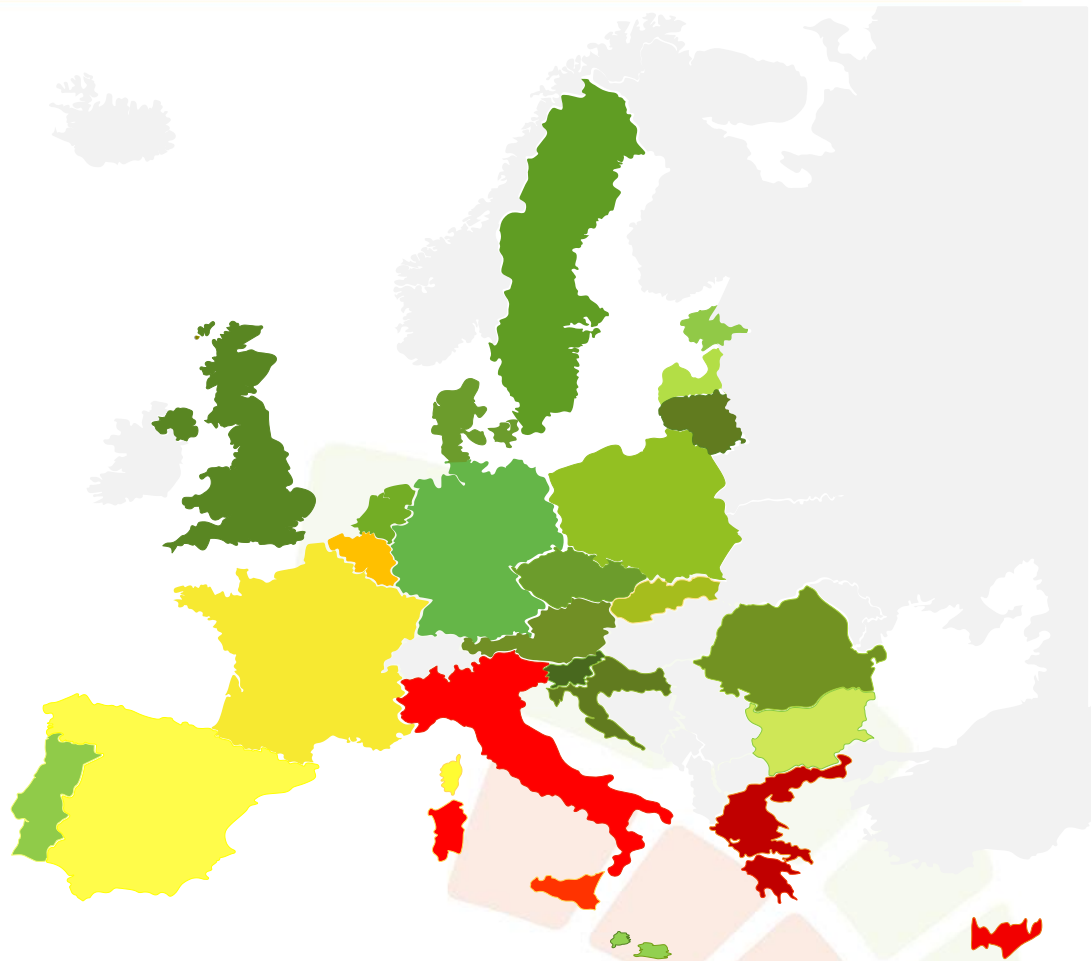
Austria: 28,9	Latvia: 5,9
Belgium: -7,8	Lithuania: 22,1
Bulgaria: 8,7	Malta: 11
Croatia: 5,4	Netherlands: 14,2
Czech Republic: 13,7	Poland: 12,9
Cyprus: 1,2	Portugal: 5,7
Denmark: 30,0	Romania: 26
Estonia: 3,5	Slovakia: 10,1
France: 0,2	Slovenia: 33,3
Germany: 23,4	Spain: 19,1
Greece: -5,6	Sweden: 27,5
Italy: -15,8	United Kingdom: 0



 @eaca_eu #AdIndex2018

The colour codes for each country are based on the average of January, February and March 2018 values of the Advertising Business Climate Index. The lowest value (Italy, -15,8) is highlighted in red and the highest value (Slovenia, +33,3) 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: 18,5	Latvia: 7,3
Belgium: -5,2	Lithuania: 21,5
Bulgaria: 5,1	Malta: 6,7
Croatia: 21,5	Netherlands: 17,3
Czech Republic: 19,5	Poland: 9,4
Cyprus: -22,7	Portugal: 13,3
Denmark: 19	Romania: 19,8
Estonia: 10,9	Slovakia: 11,5
France: -2,8	Slovenia: 37,2
Germany: 17,3	Spain: -1,1
Greece: -27,7	Sweden: 21,5
Italy: -20,6	United Kingdom: 24,8



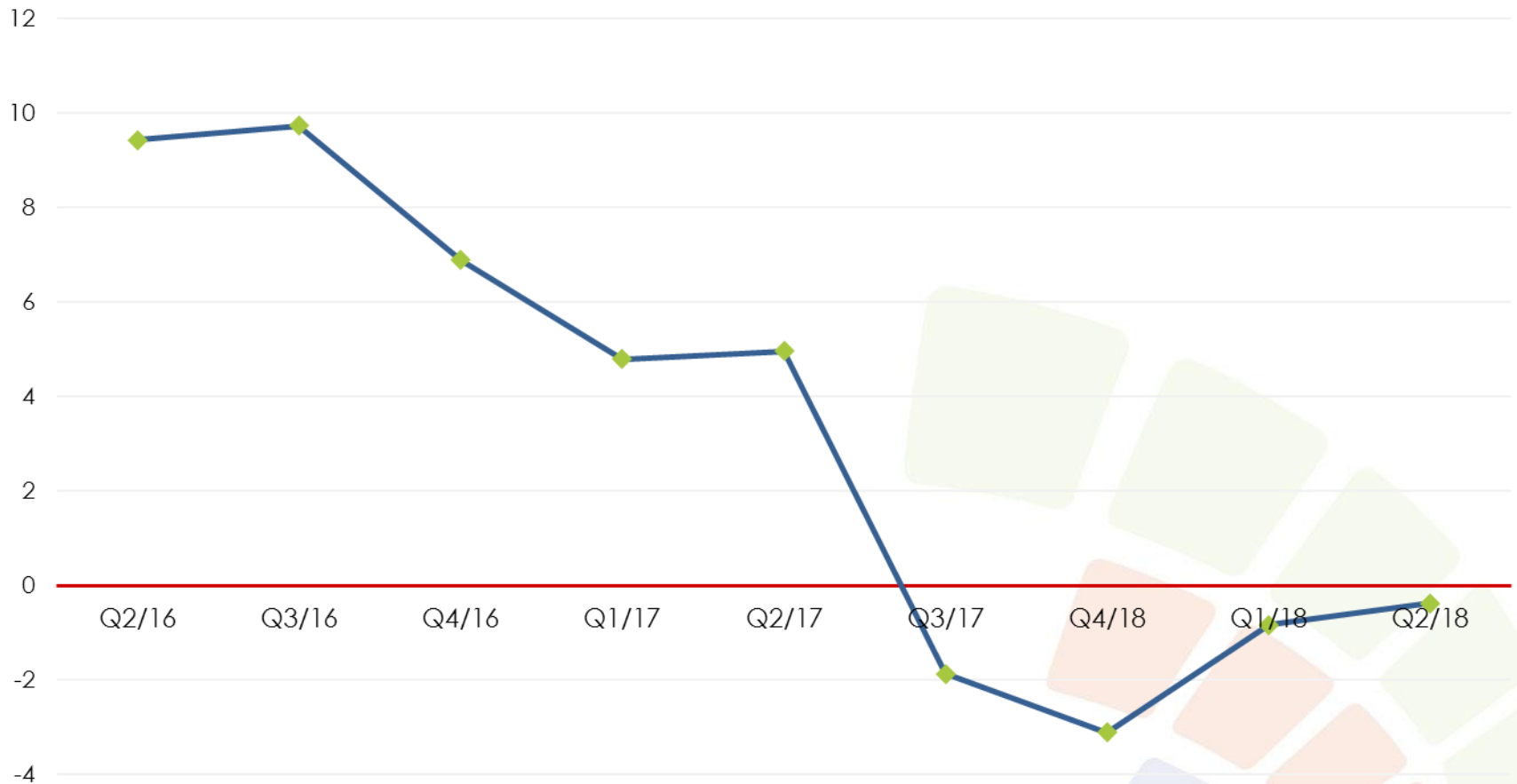
 @eaca_eu #AdIndex2018

The colour codes for each country are based on the average of April, May and June 2018 values of the Advertising Business Climate Index. The lowest value (Greece, -27,7) is highlighted in red and the highest value (Slovenia, +37,2) 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

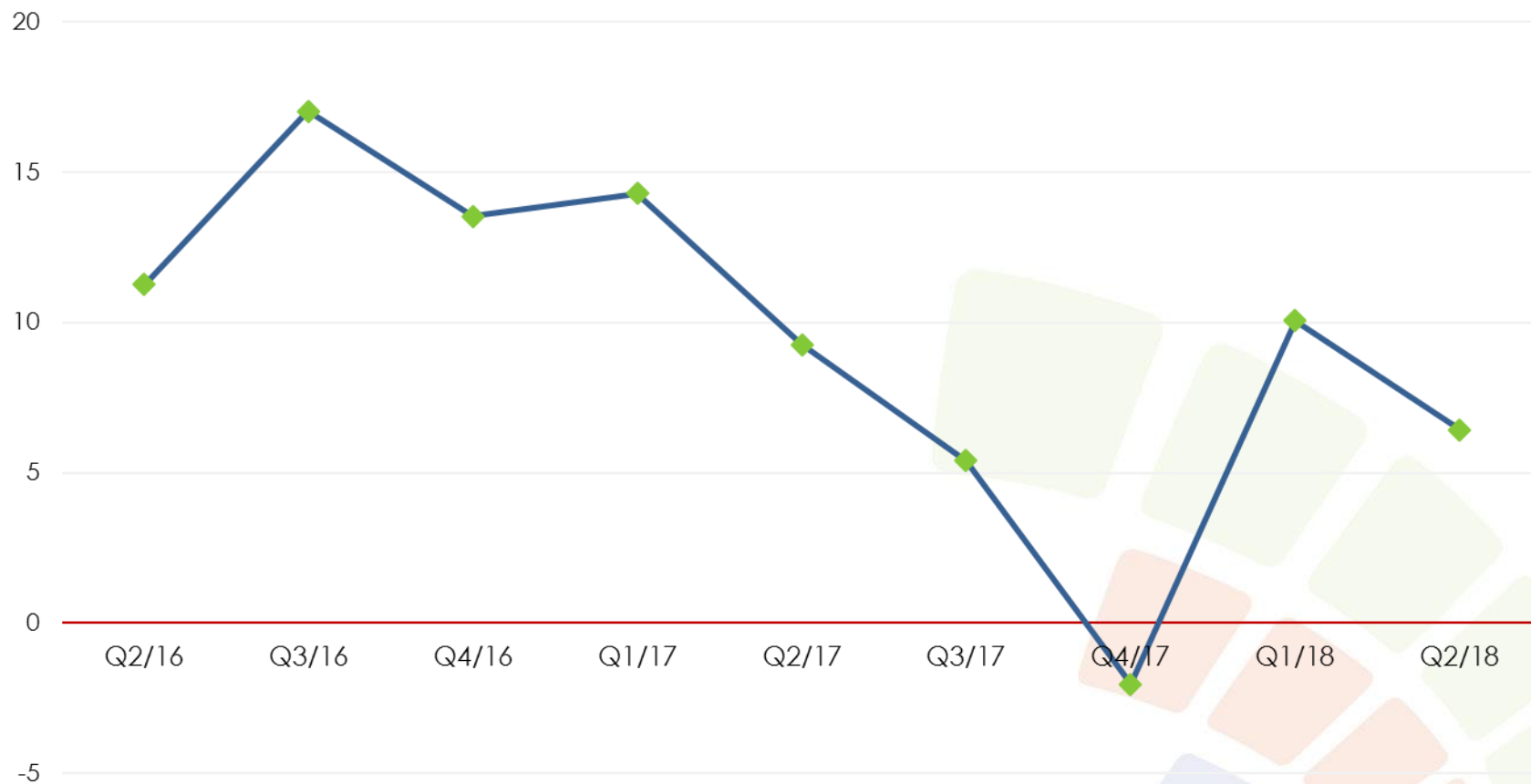
How has your business situation developed over the past 3 months?





Evolution of demand for advertising services over the past 3 months

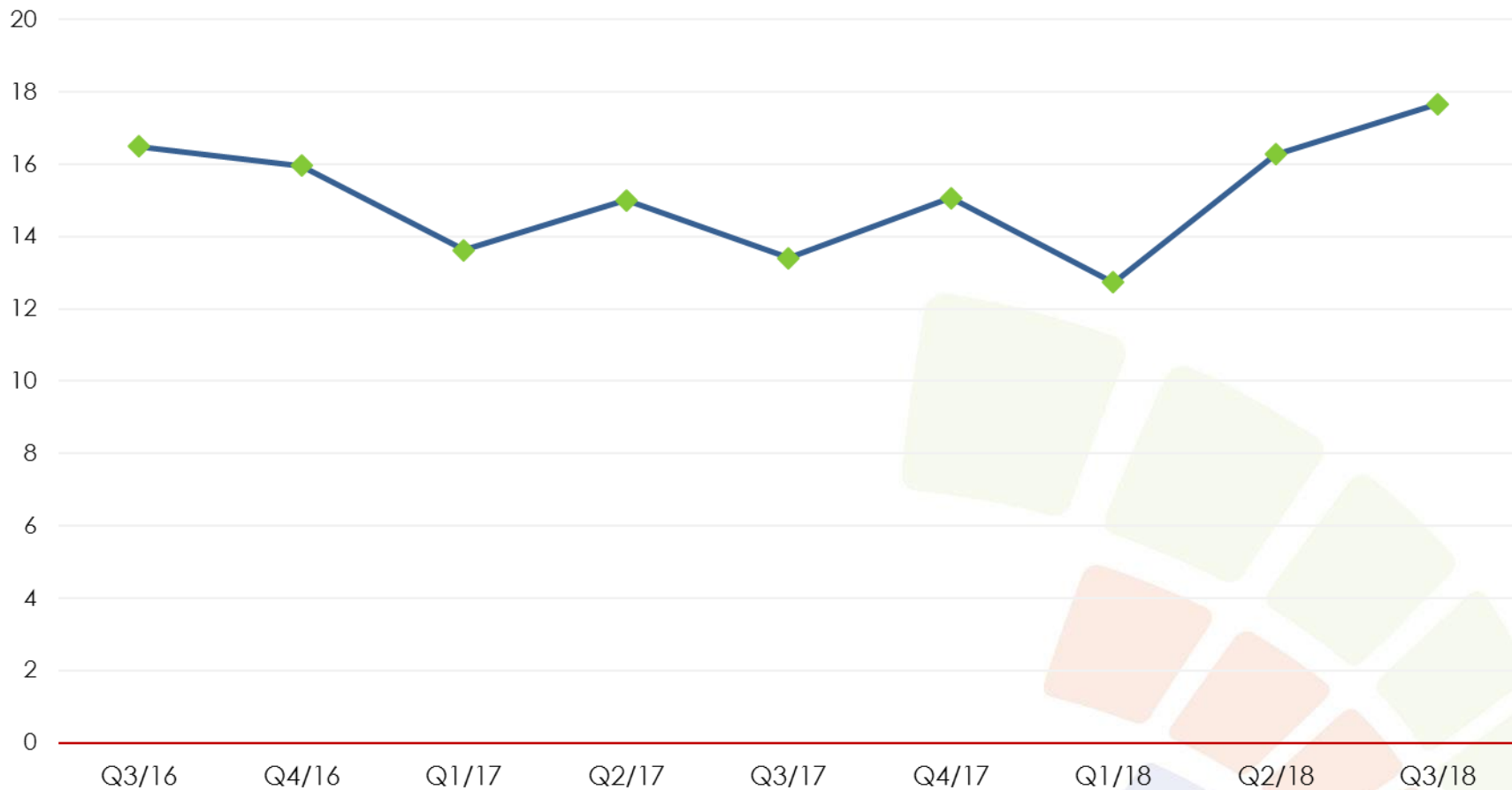
How has your demand (turnover) for your company's services changed over the past 3 months?





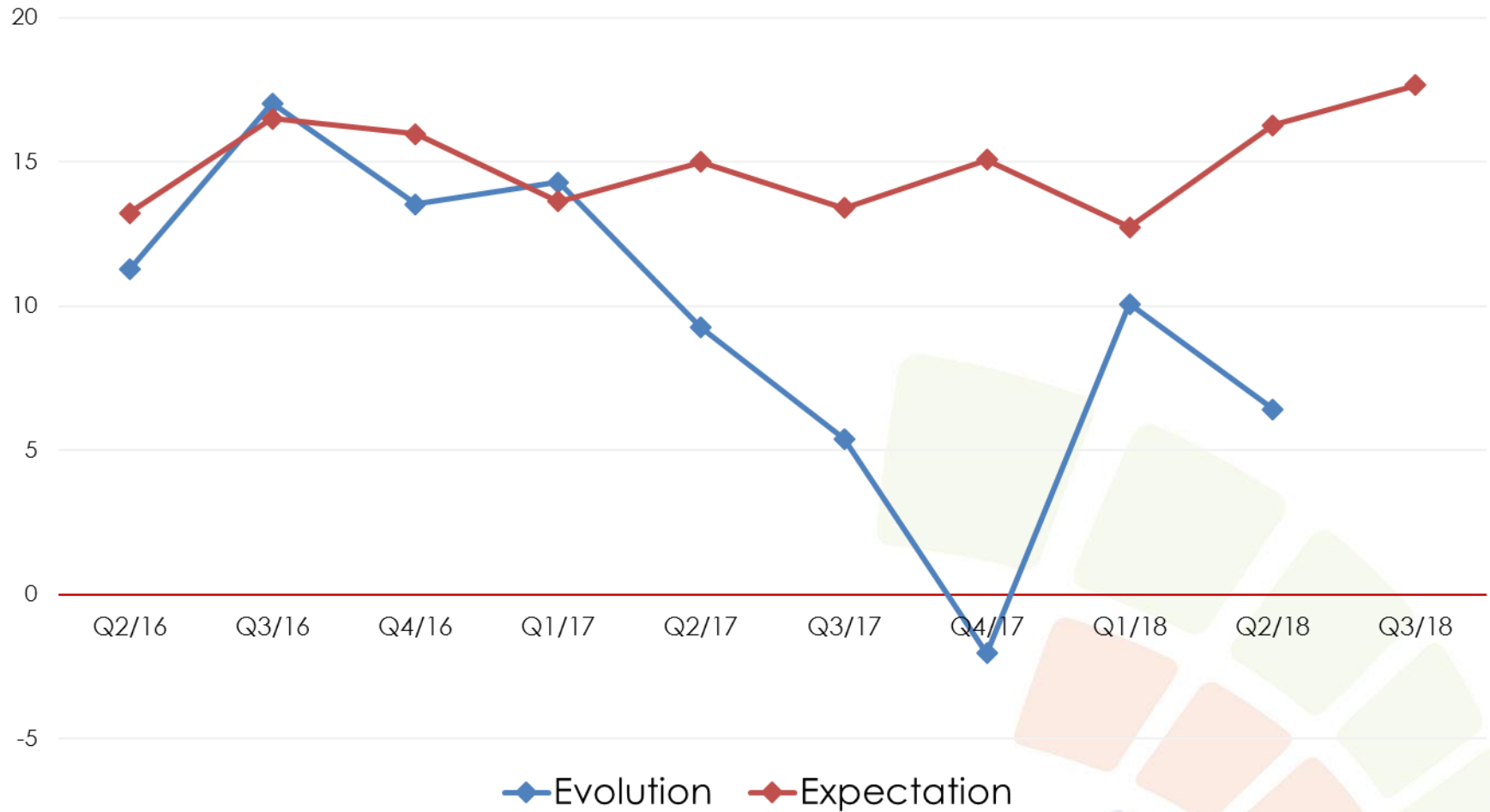
Expectation of advertising demand over the next 3 months

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



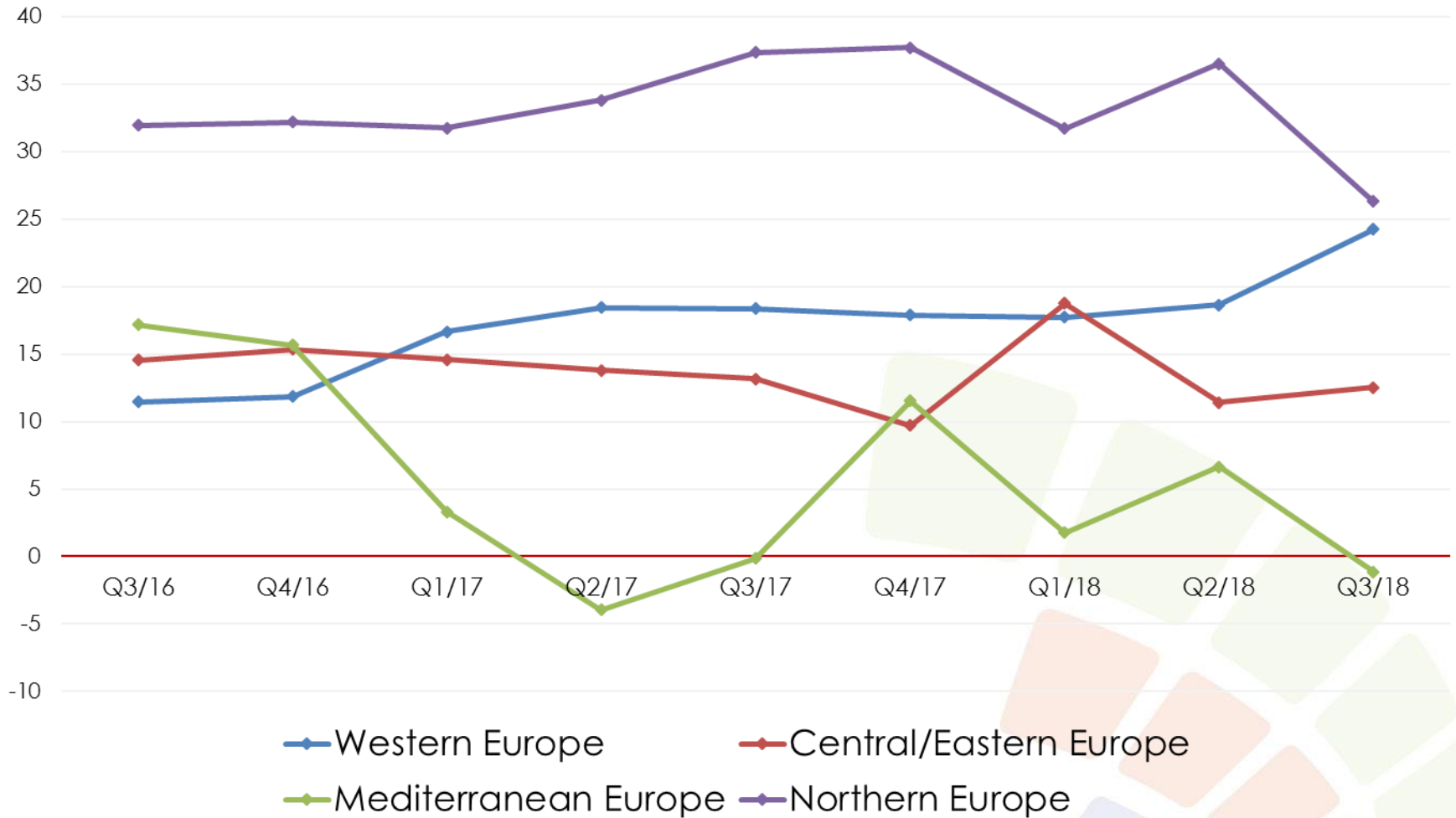


Demand expectation vs demand evolution





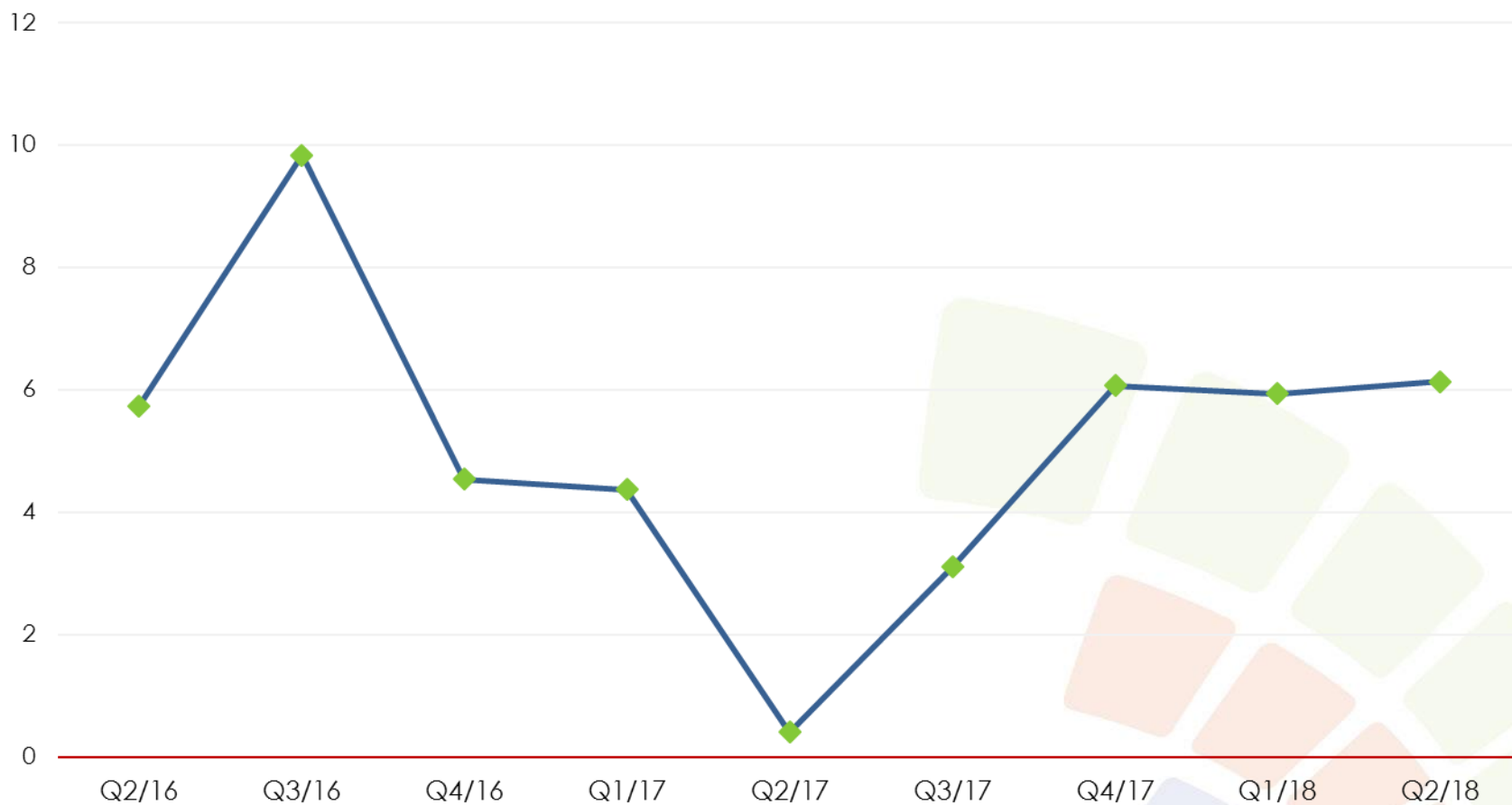
Expectations of advertising demand over the next 3 months





Evolution of employment over the past 3 months

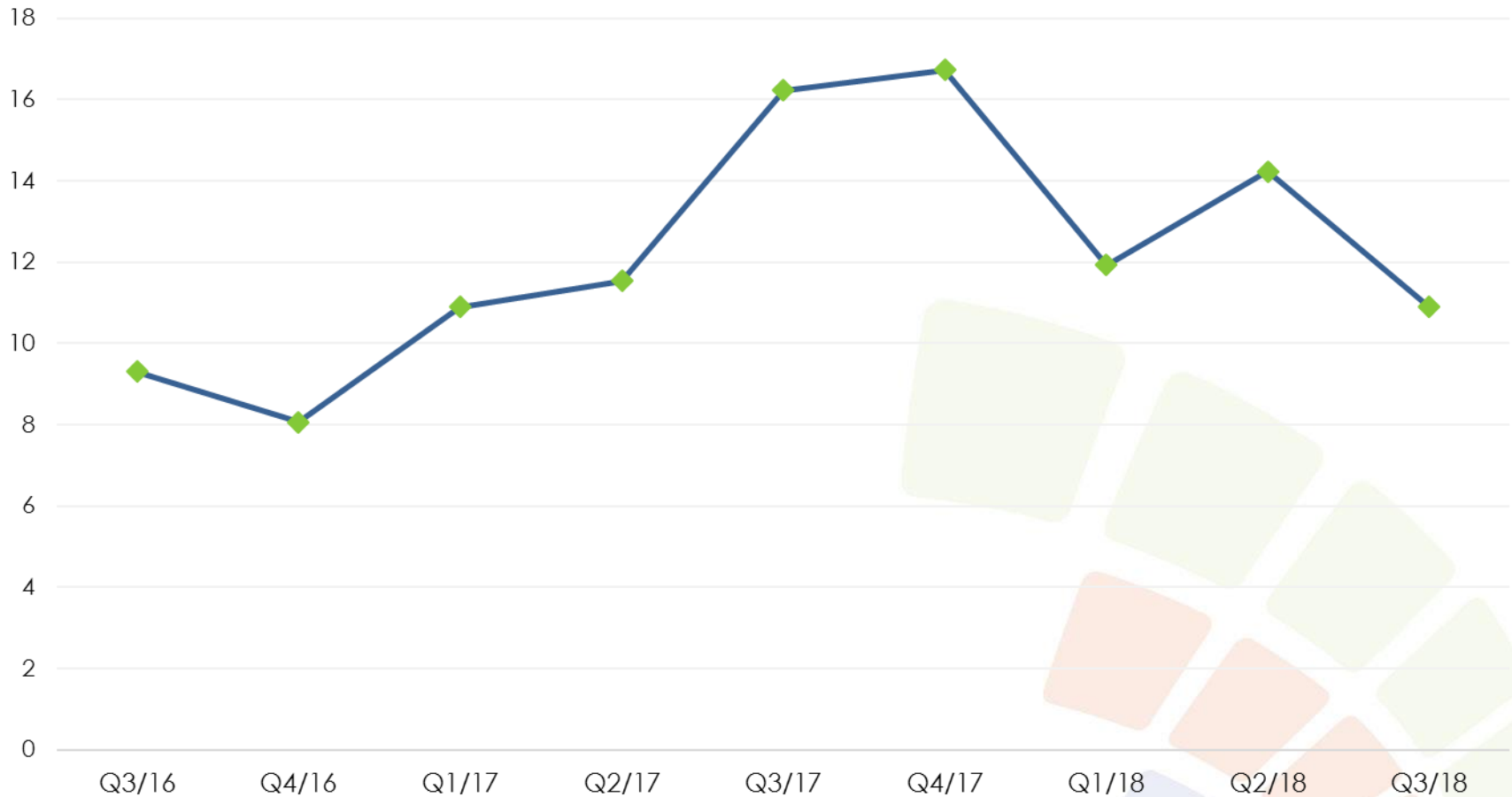
How has your company's total employment changed over the past 3 months?

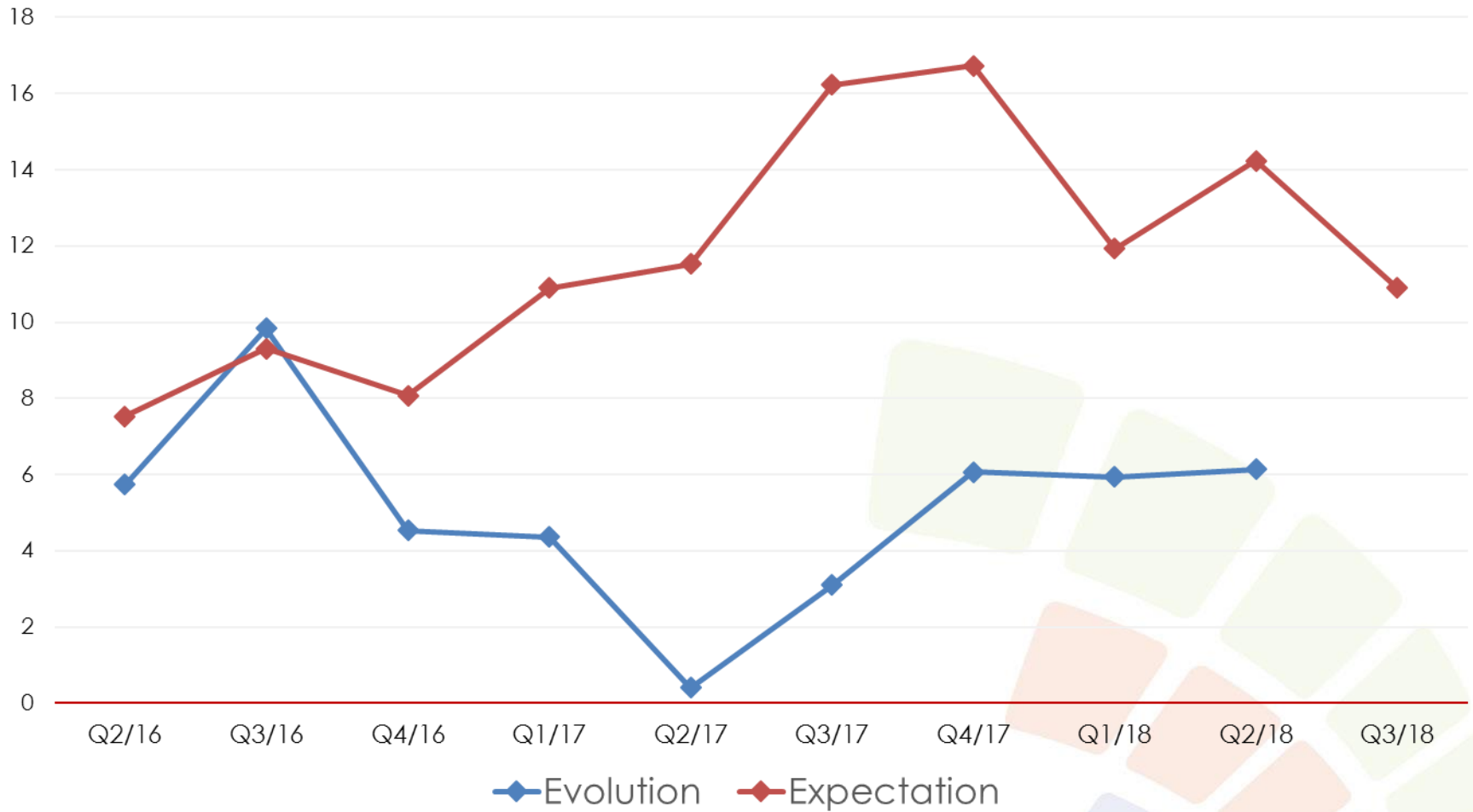


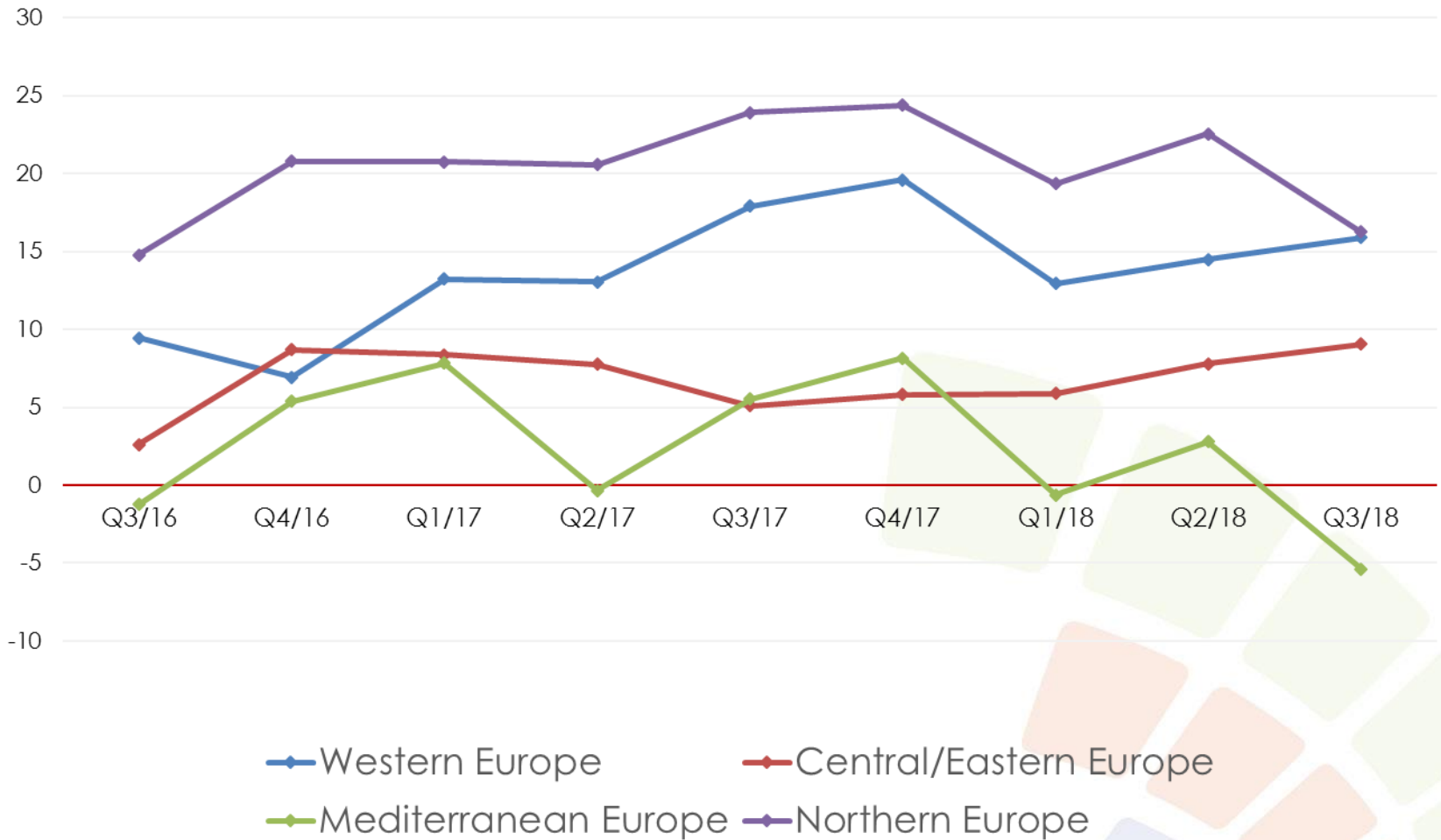


Expectation of employment over the next 3 months

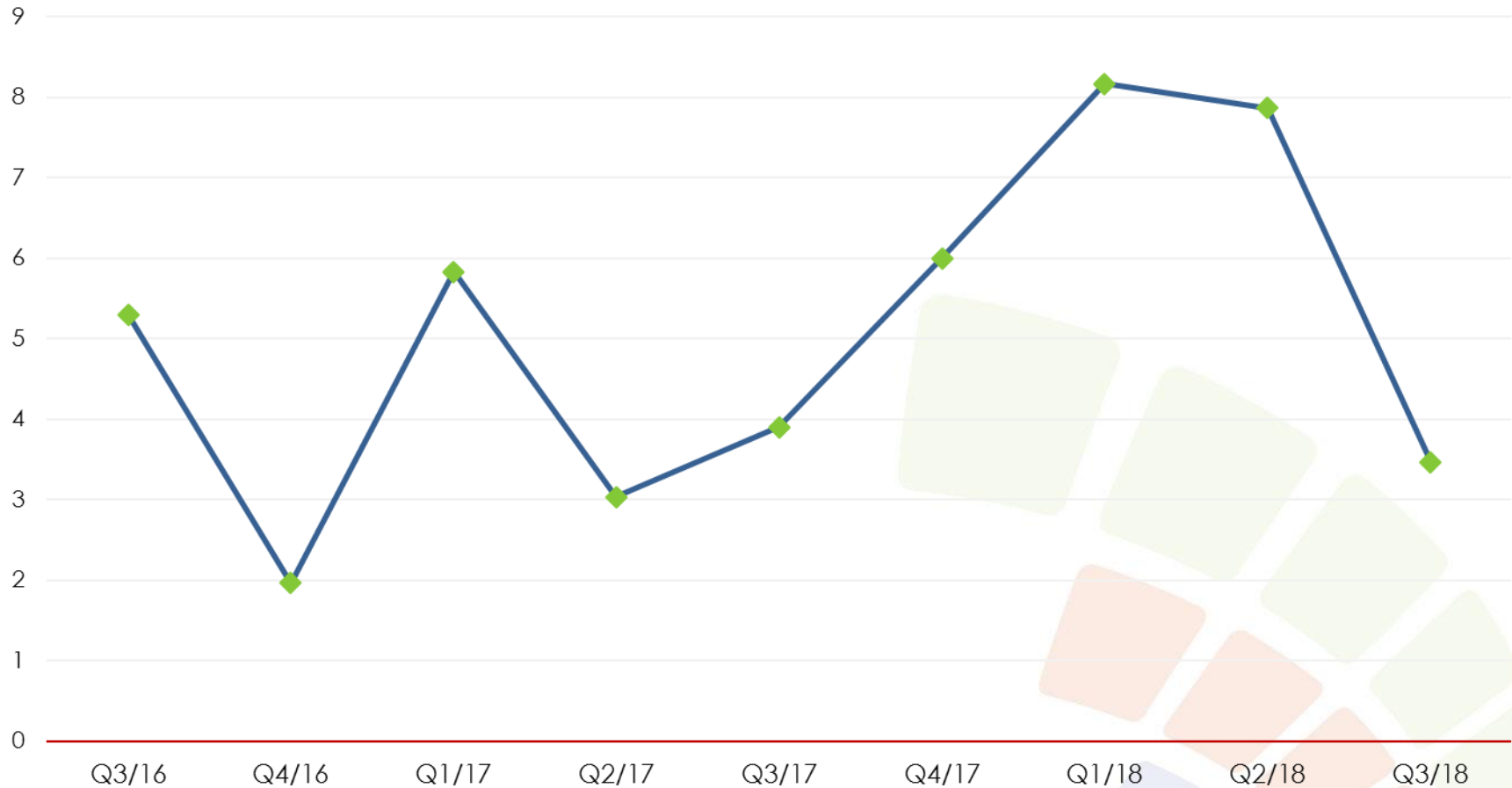
How do you expect your company's employment to change over the next 3 months?





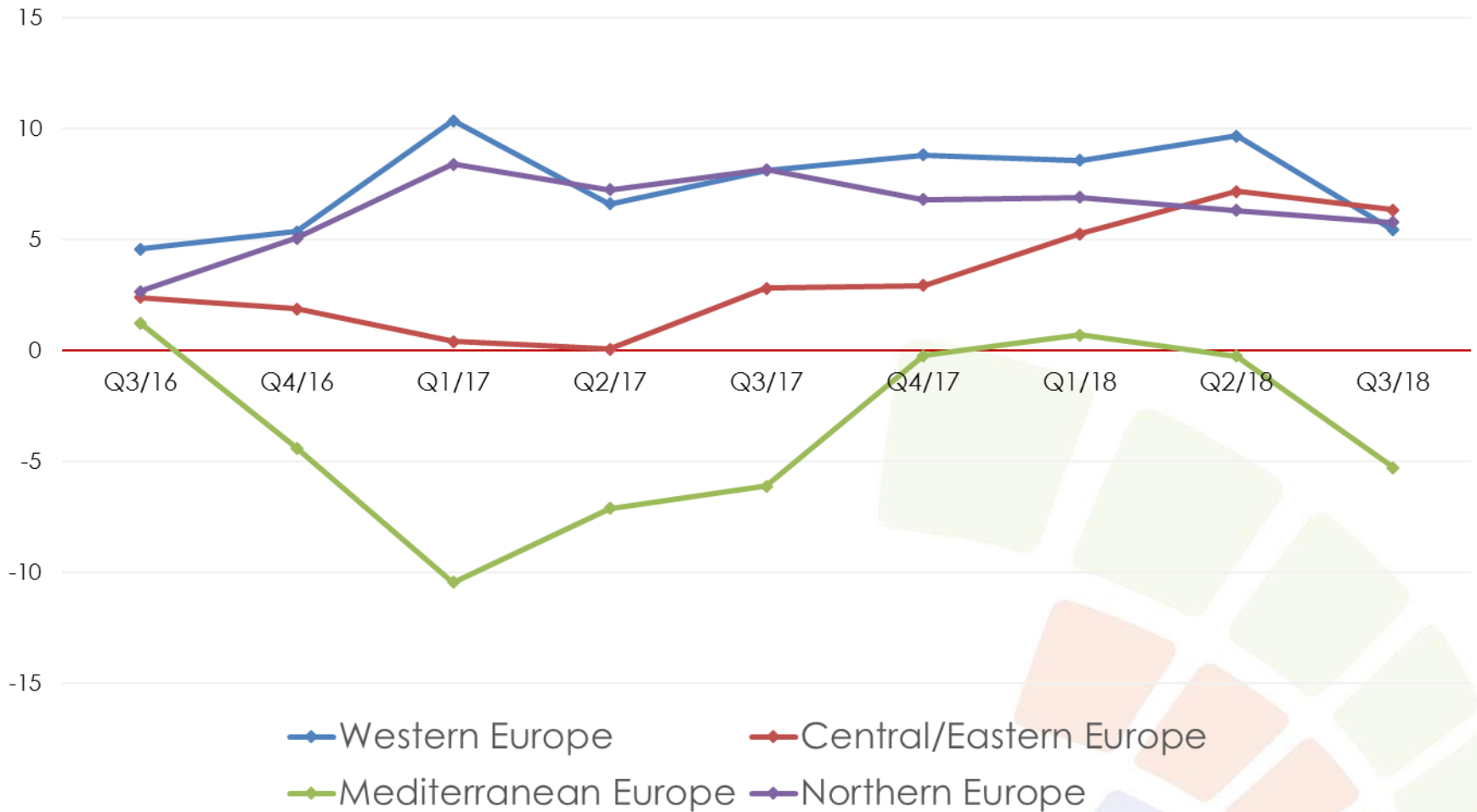


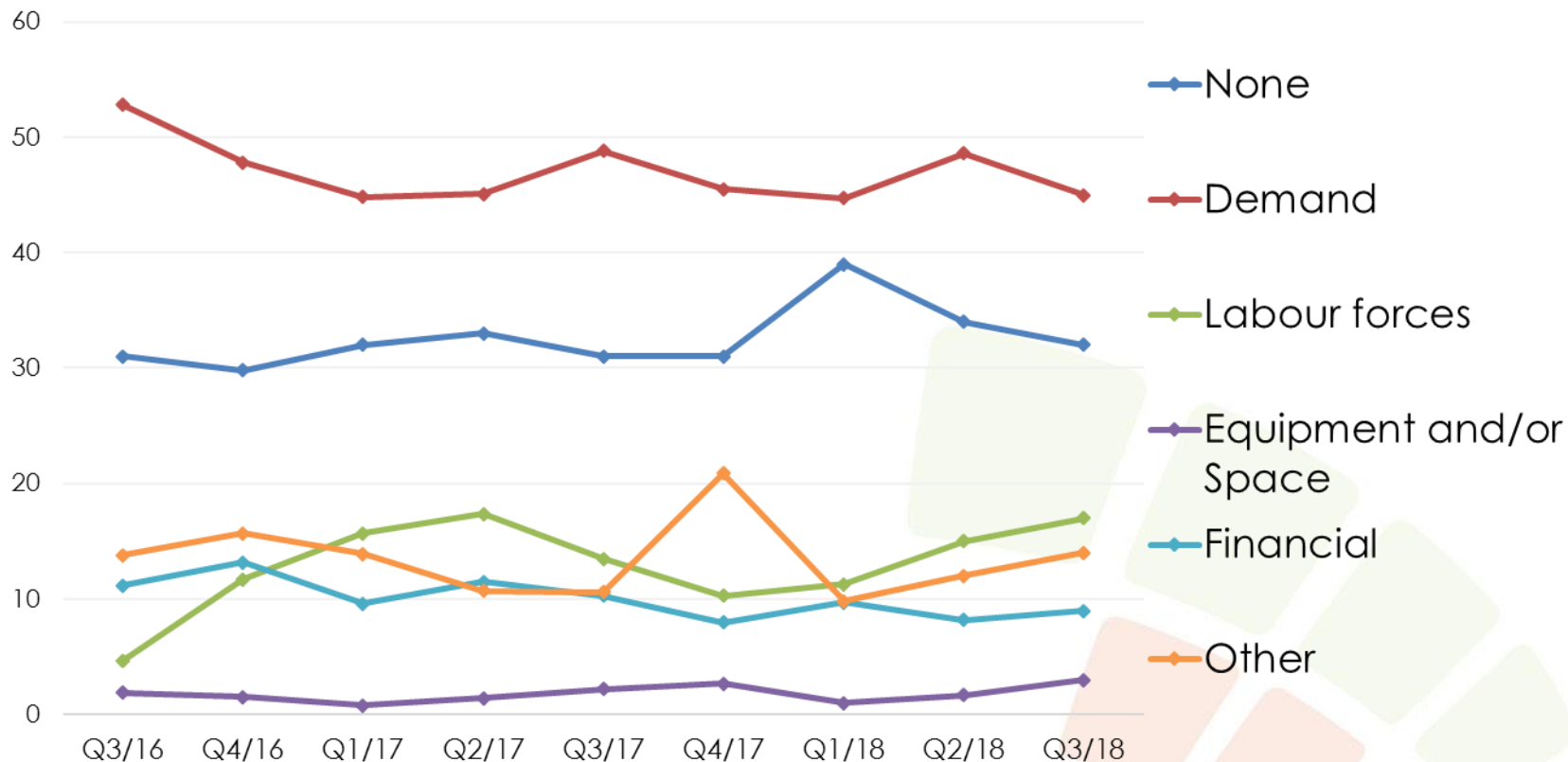
How do you expect prices to change over the next 3 months?





Expectation of selling prices over the next 3 months

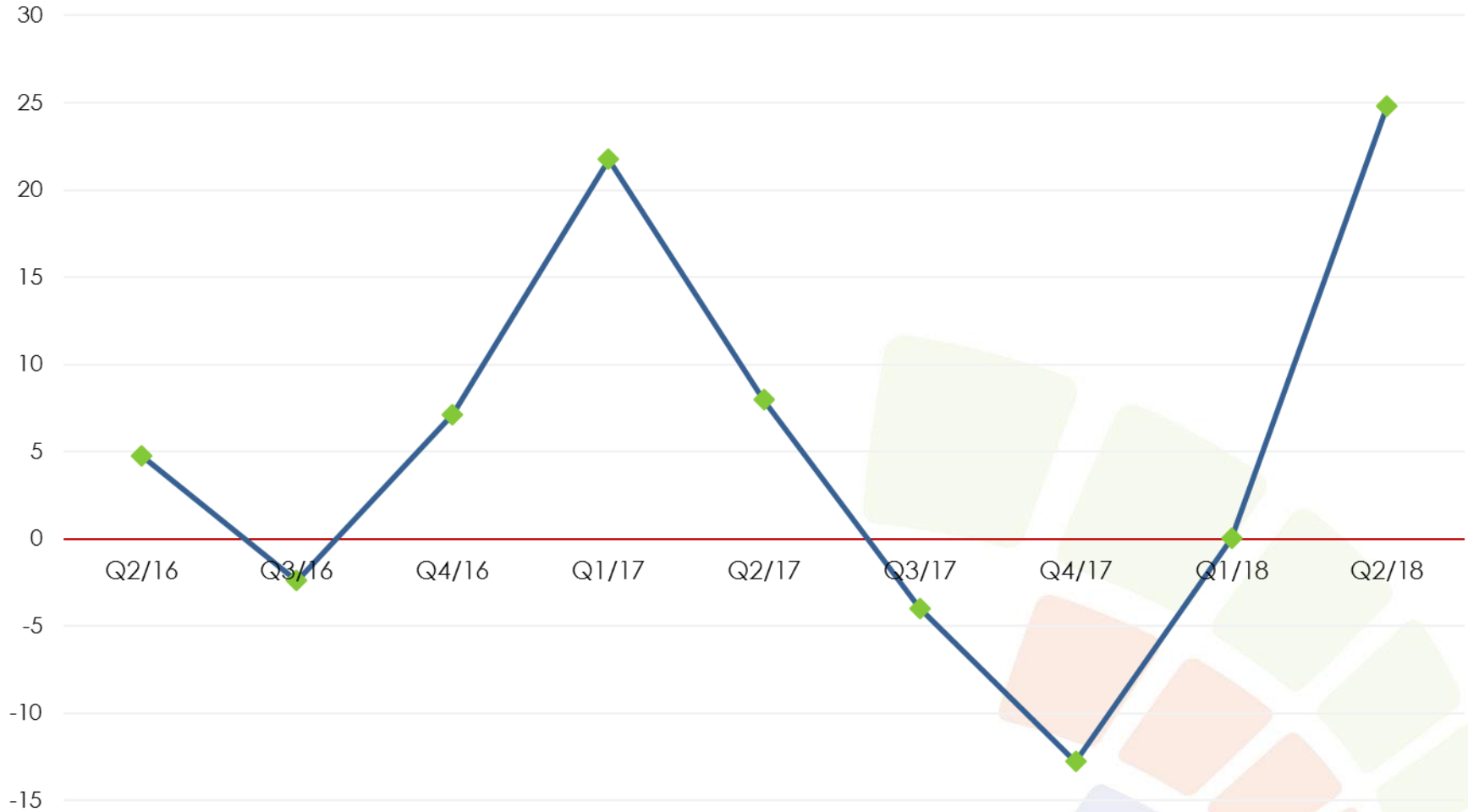


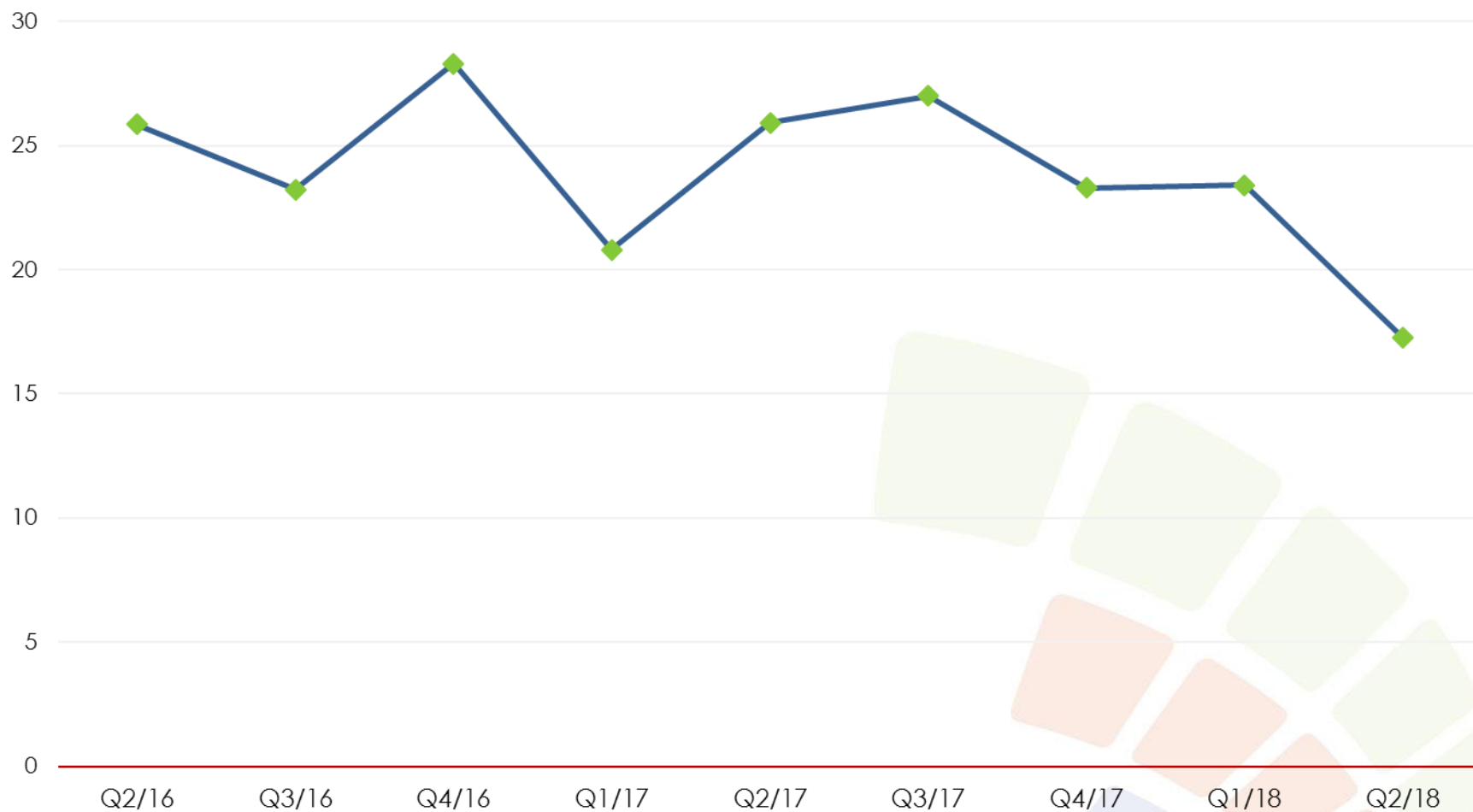


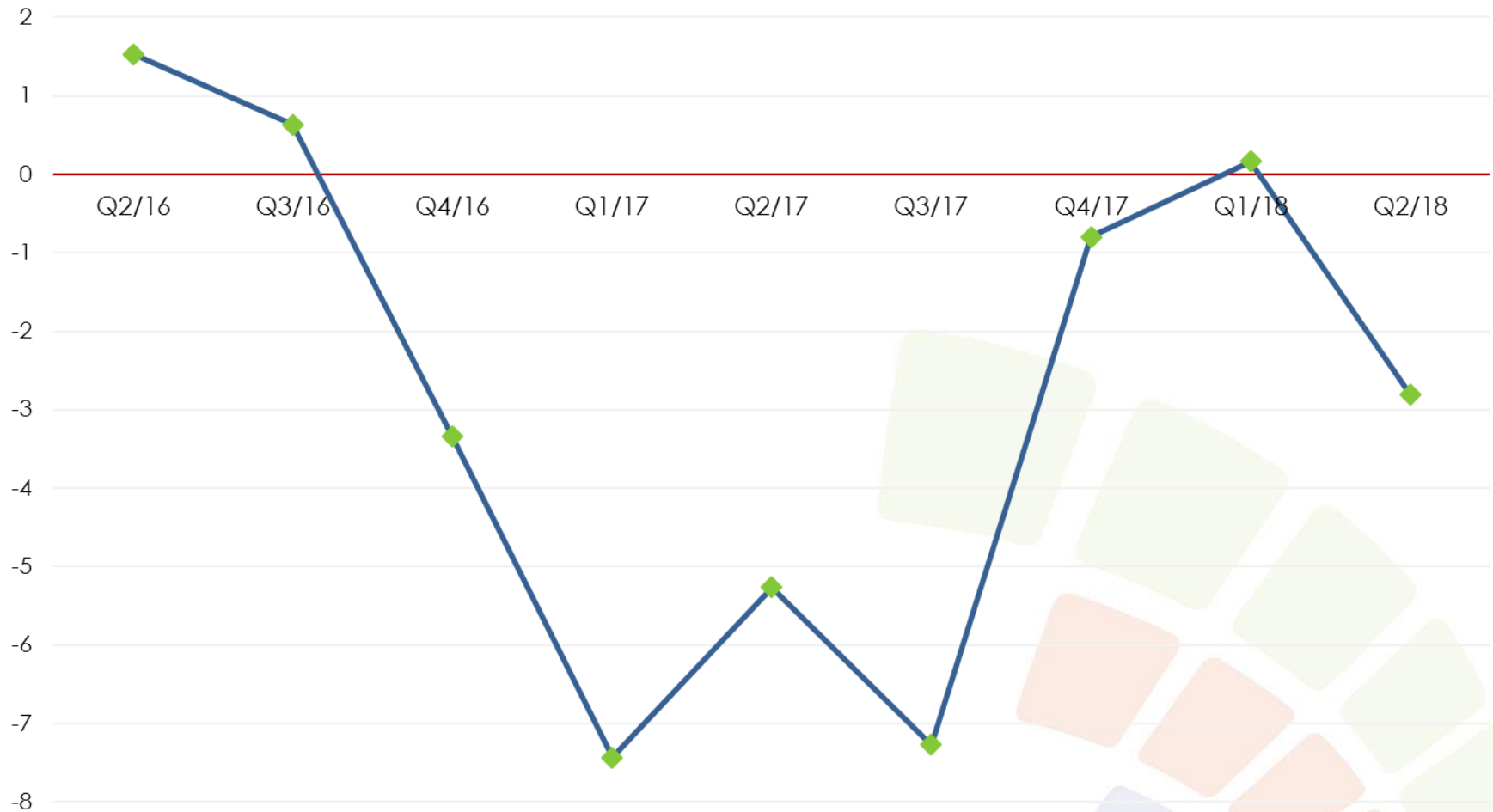


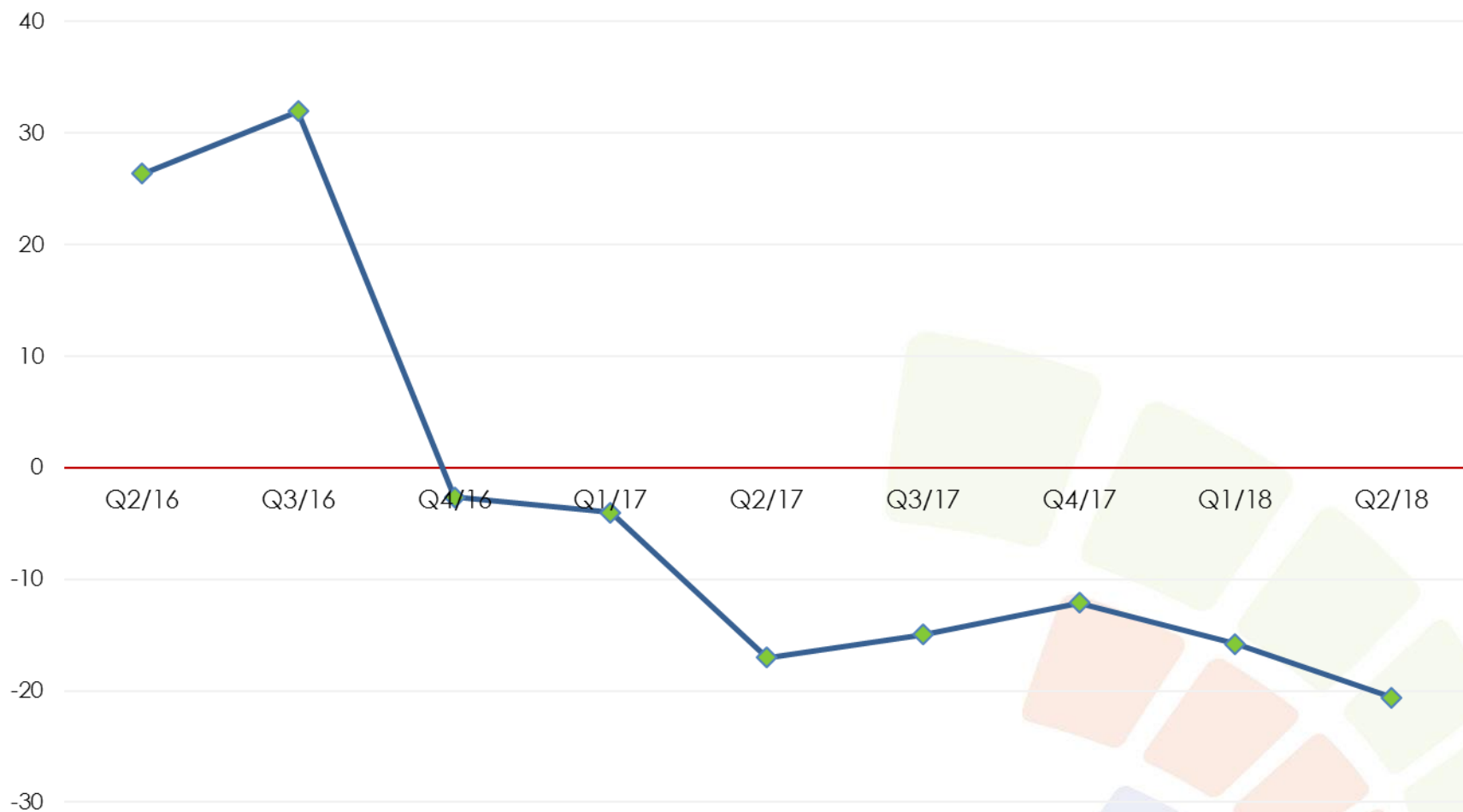
Country-specific graphs

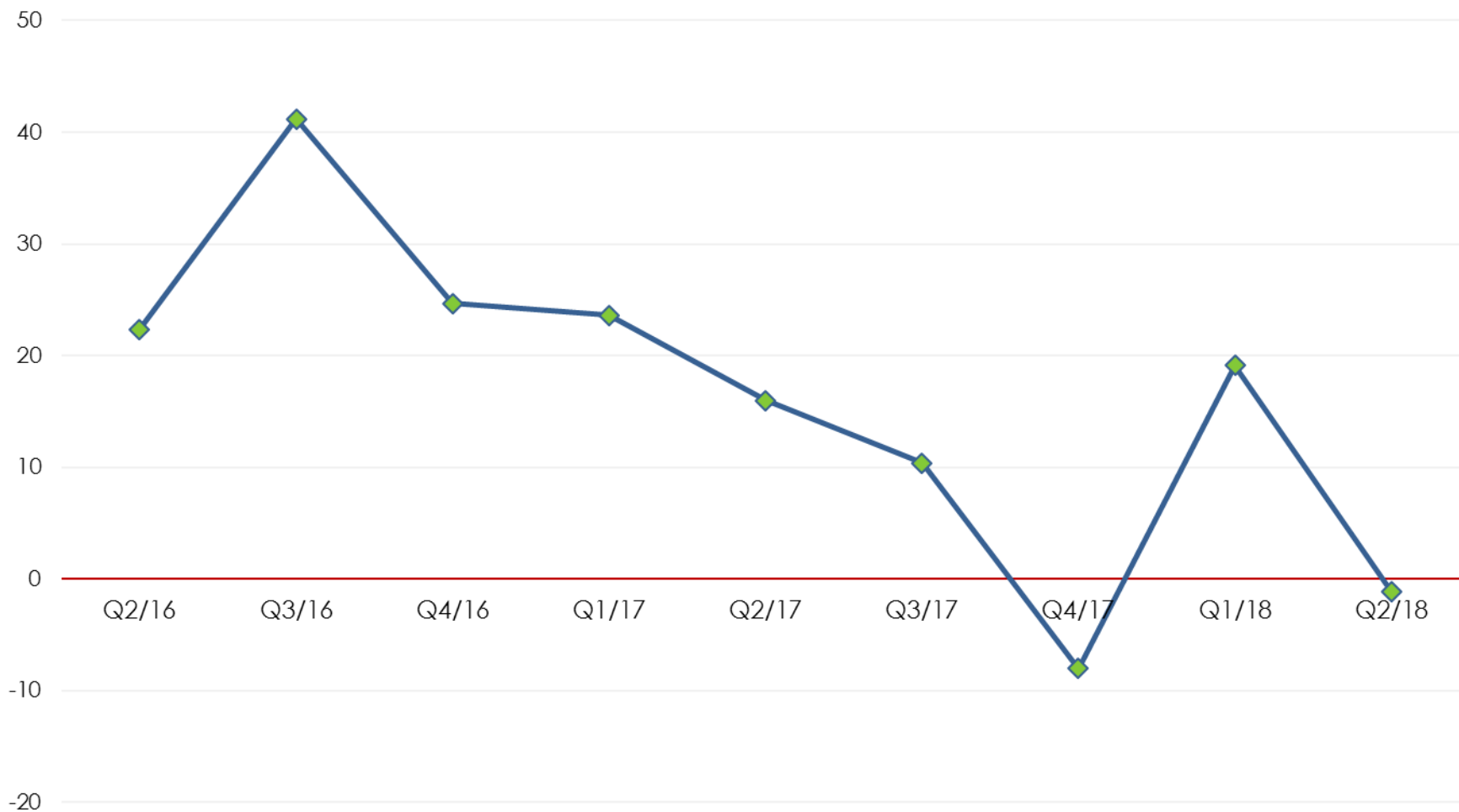


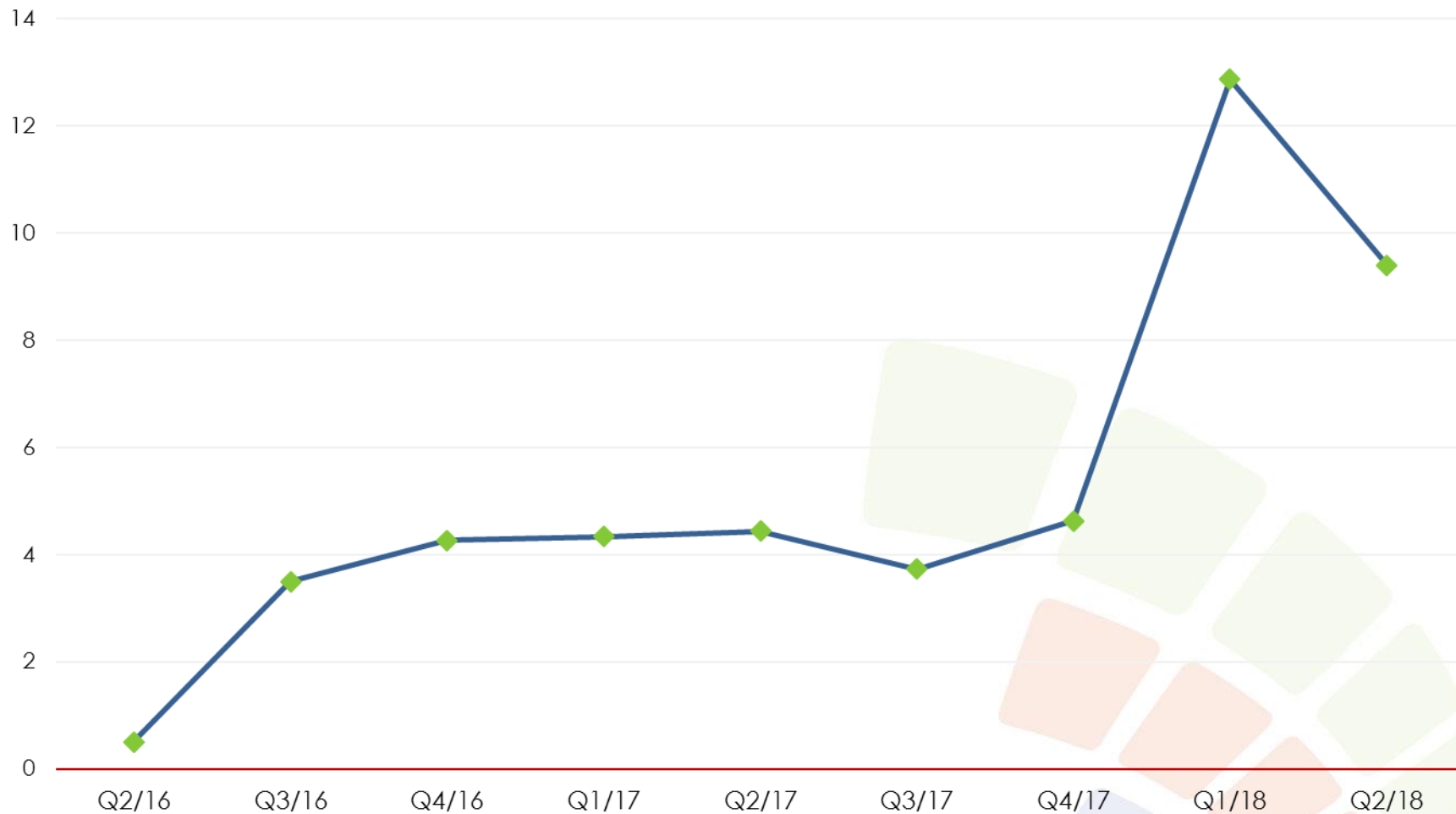


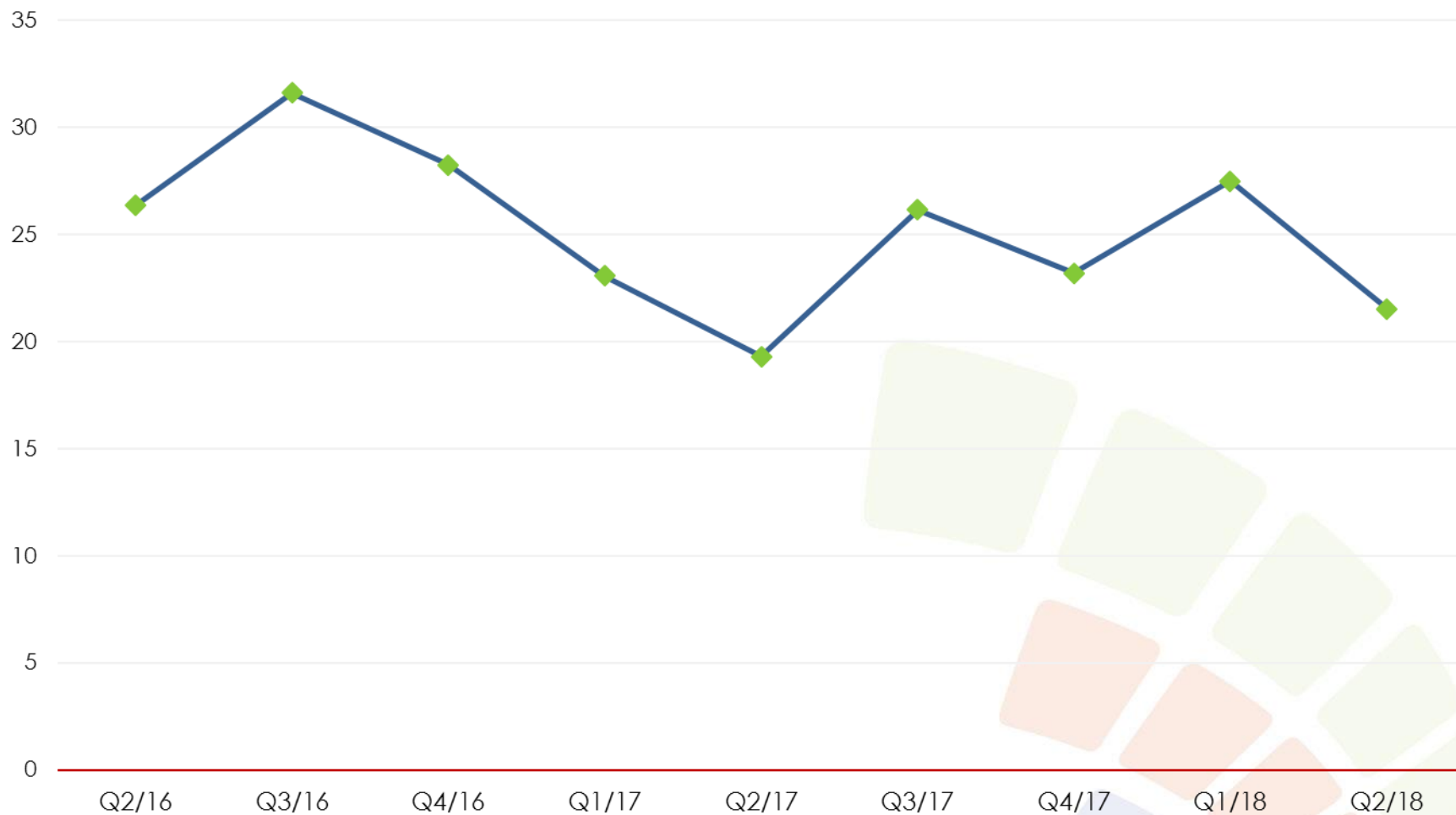














Advertising Business Climate Index

For further information, please contact:

Sofia Karttunen

European Affairs Officer

Tel: + 32 2 740 0712

E- mail: sofia.karttunen@eaca.eu



@eaca_eu

#AdIndex2018

