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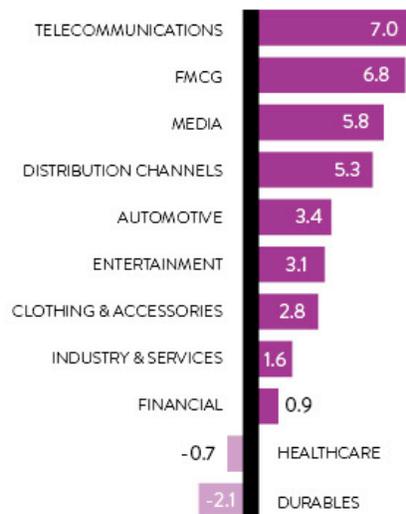
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Ad Spend by Sector: Consumer Goods and Telecom Take the Cake in 2012

While global advertising spending increased overall in 2012, not all sectors reaped the benefits. The telecommunications, consumer goods and media sectors saw the biggest increases, earning year-over-year jumps of 7, 6.8 and 5.8 percent, according to Nielsen's quarterly Global AdView Pulse report. Comparatively, former top performers like healthcare and durables saw reduced spending for the year.



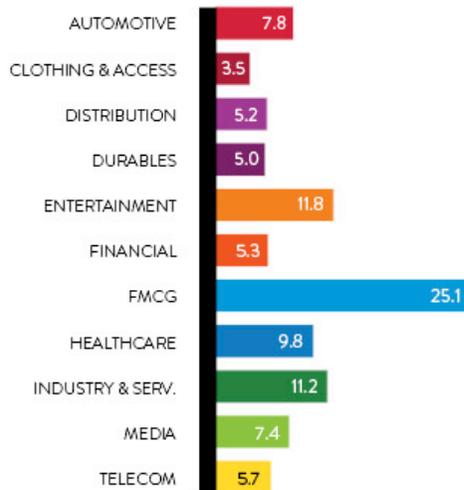
**YOY PERCENT CHANGE BY SECTOR,
JANUARY TO DECEMBER 2012 VS. SAME PERIOD 2011**



Source: Nielsen

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**PERCENT SHARE OF GLOBAL AD SPEND BY SECTOR,
JANUARY TO DECEMBER 2012**



Telecommunications

Although telecommunications continued to experience the most significant growth (7%) in ad spend in 2012, this sector remains relatively low in the ranks based on share of total advertising spend, falling into the seventh spot of 11 categories. With markets like Latin America and the Middle East and Africa totting double-digit growth (35.6 and 13.2 percent respectively), this sector appears poised to move up in the ranks in 2013.

Fast-Moving Consumer Goods (FMCG)

FMCG follows closely behind telecommunications, posting a strong year-over-year increase of 6.8 percent on the heels of a 9.5 percent ramp-up in fourth quarter spending. These increases and the sector's long-standing position as leader based on share of ad spend (25.1%) illustrate the crucial role that FMCG plays in driving advertising spend globally.

Automotive

Automotive advertising spend slipped in the fourth quarter (down 2.8% compared to Q4 2011), resulting in modest growth of 3.4 percent for 2012. The sector ranks fifth based on its 7.8 percent share of global ad spend.

Entertainment

Entertainment, the number two sector based on share of global ad spend, falls very closely behind automotive based on percent change in ad spend for the year. Despite a nominal 3.1 percent year-over-



year increase, it's nearly 12 percent (11.8%) share proves the category is a major player in the global advertising industry and that entertainment companies are continuing to invest.

Methodology

Nielsen Global AdView Pulse measures ad spending for TV, newspapers, magazines, radio, outdoor, cinema and Internet display advertising. . Ad spend is based mainly on published rate-cards. Some markets may exclude select media due to data availability.

The external data sources for the other countries included in the report are:

Argentina: IBOPE

Brazil: IBOPE

Croatia: Nielsen in association with Ipsos

Egypt: PARC (Pan Arab Research Centre)

France: Yacast

Greece: Media Services

Hong Kong: admanGo

Japan: Nihon Daily Tsushinsha

Kuwait: PARC (Pan Arab Research Centre)

Lebanon: PARC (Pan Arab Research Centre)

Mexico: IBOPE

Pan-Arab Media: PARC (Pan Arab Research Centre)

Portugal: Mediamonitor

Saudi Arabia: PARC (Pan Arab Research Centre)

Spain: Arce Media

Switzerland: Nielsen in association with Media Focus

UAE: PARC (Pan Arab Research Centre)