



EUROPEAN ASSOCIATION OF
COMMUNICATIONS AGENCIES

European Advertising Business Climate Index

Q4 2016/Q1 2017



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#AdIndex2017





ABOUT

- Quarterly survey of European advertising and market research companies
- Provides information about:
 - managers' assessment of their **business situation Q4/2016 & forecast for Q1/2017**
 - 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, 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

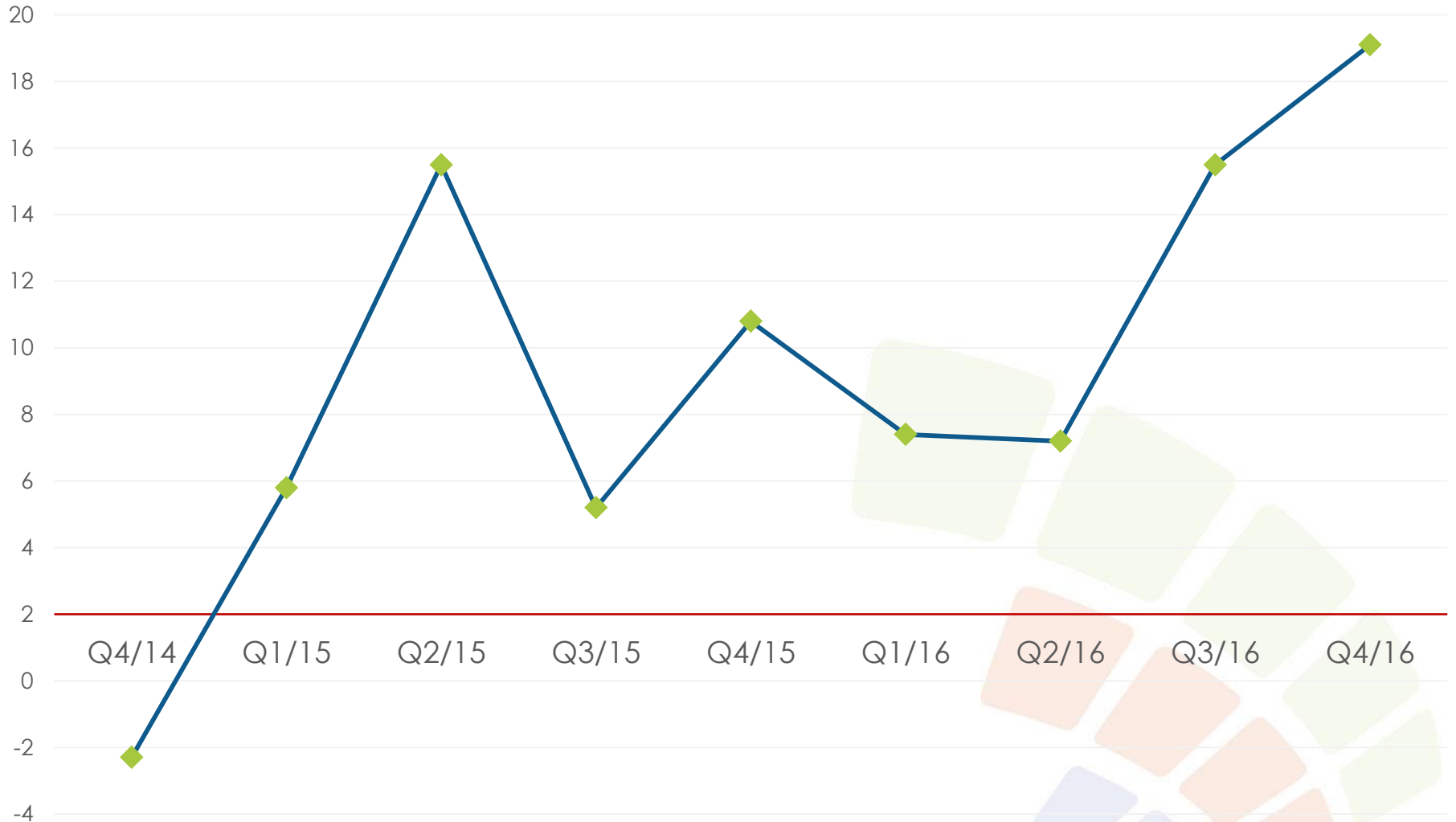
“increase” (+), “remain unchanged” (=), “decrease” (-)

% of positive answers – % of negative answers





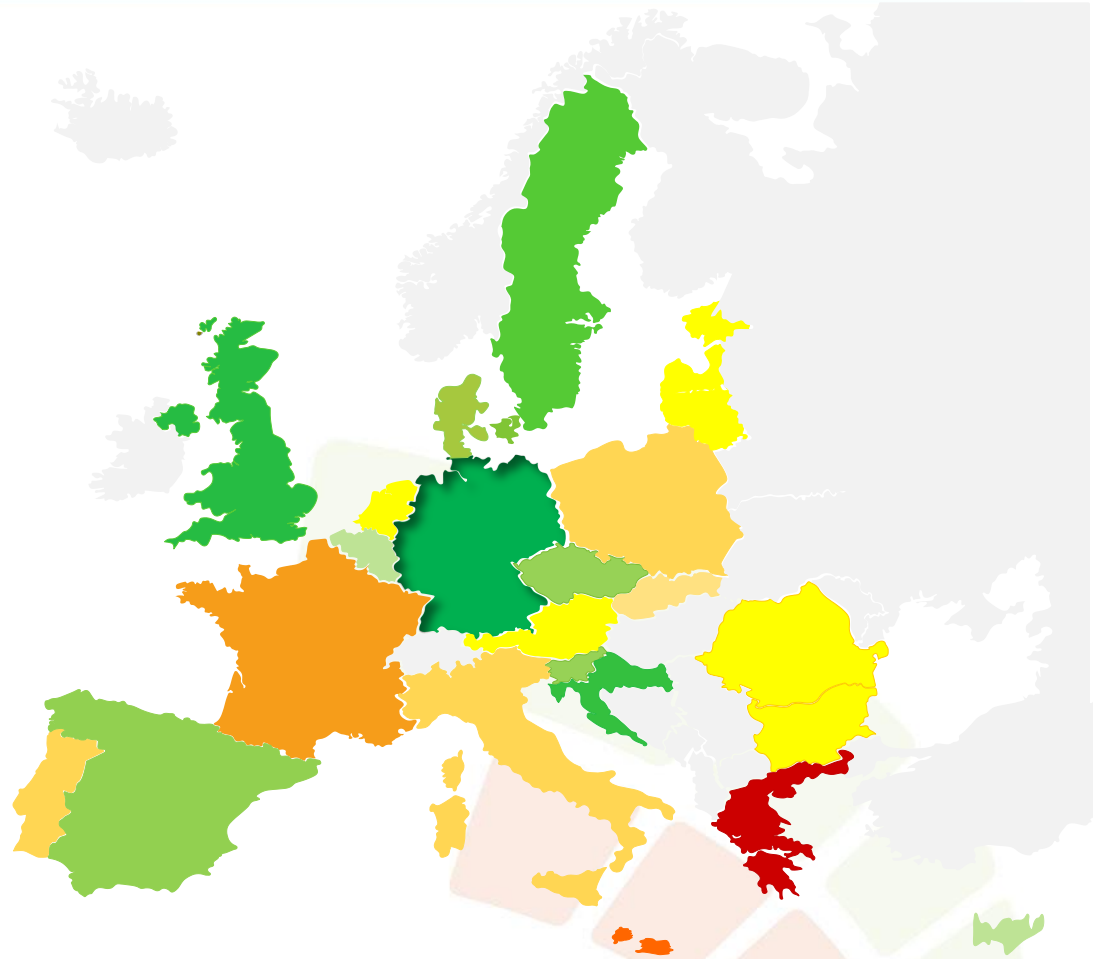
Advertising Business Confidence Index



Austria: 14	Italy: 1
Belgium: 24	Latvia: 12
Bulgaria: 12	Lithuania: 14
Czech Republic: 27	Malta: -15
Denmark: 24	Netherlands: 7
Germany: 48	Poland: 3
Estonia: 6	Portugal: 0
Greece: -47	Romania: 12
Spain: 25	Slovenia: 14
France: -8	Slovakia: 6
Croatia: 36	Sweden: 33
Cyprus: 21	United Kingdom: 38.7



Lowest → Highest



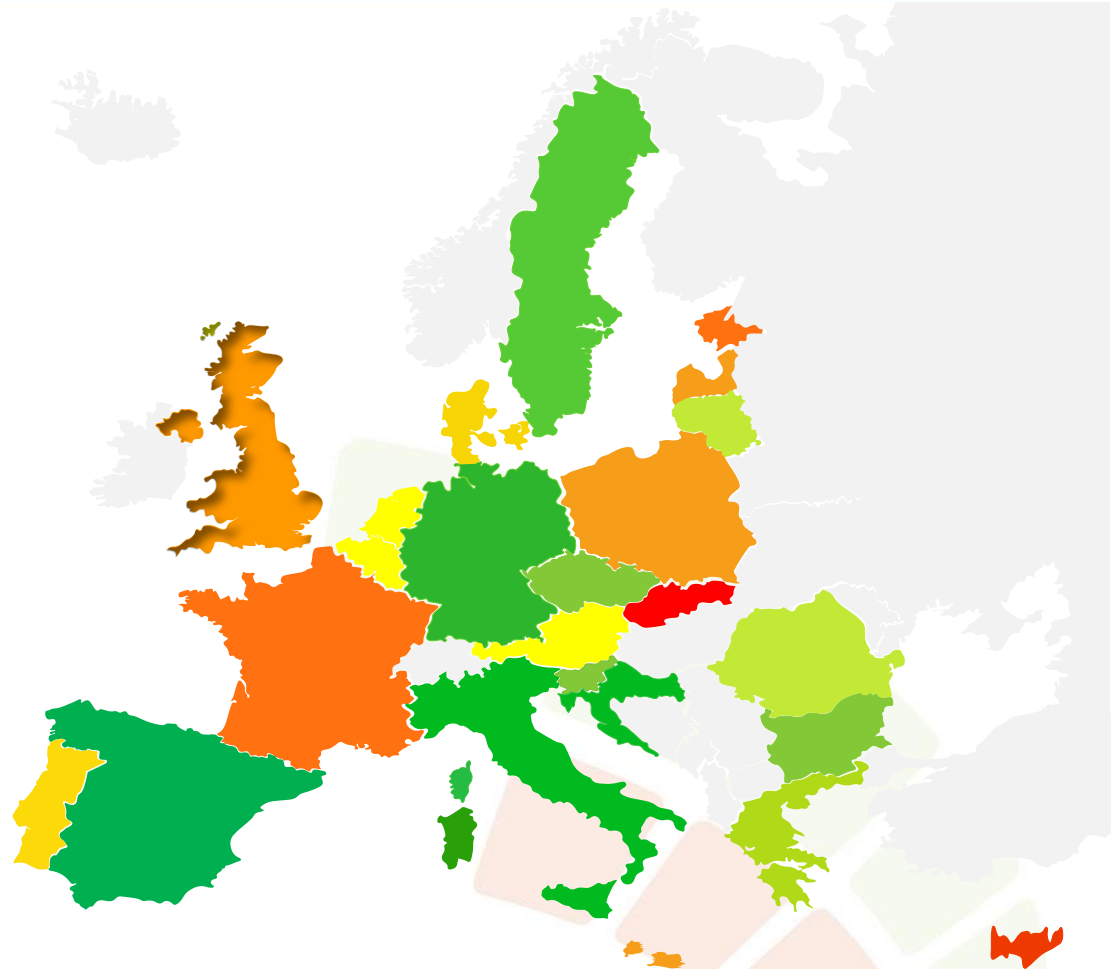
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The colour codes for each country are based on July 2016 values of the Advertising Business Confidence Index. The lowest value (Greece, -47) is highlighted in red and the highest value (Germany, +48) in dark green, while all others are marked with different shades that lie within the spectrum. **The colour coding for a specific month is indicative of that country's position relative to the others.** It is not an indication of the absolute confidence level in that country and may change across the EU depending on the highest and the lowest values, meaning that the same value may have a different colour code each month.

Austria: 12	Italy: 30
Belgium: 14	Latvia: 6
Bulgaria: 22	Lithuania: 18
Czech Republic: 22	Malta: 5
Denmark: 9	Netherlands: 12
Germany: 27	Poland: 5
Estonia: -2	Portugal: 10
Greece: 21	Romania: 18
Spain: 38	Slovenia: 23
France: -5	Slovakia: -17
Croatia: 31	Sweden: 27
Cyprus: -9	United Kingdom: 4.1



Lowest → Highest



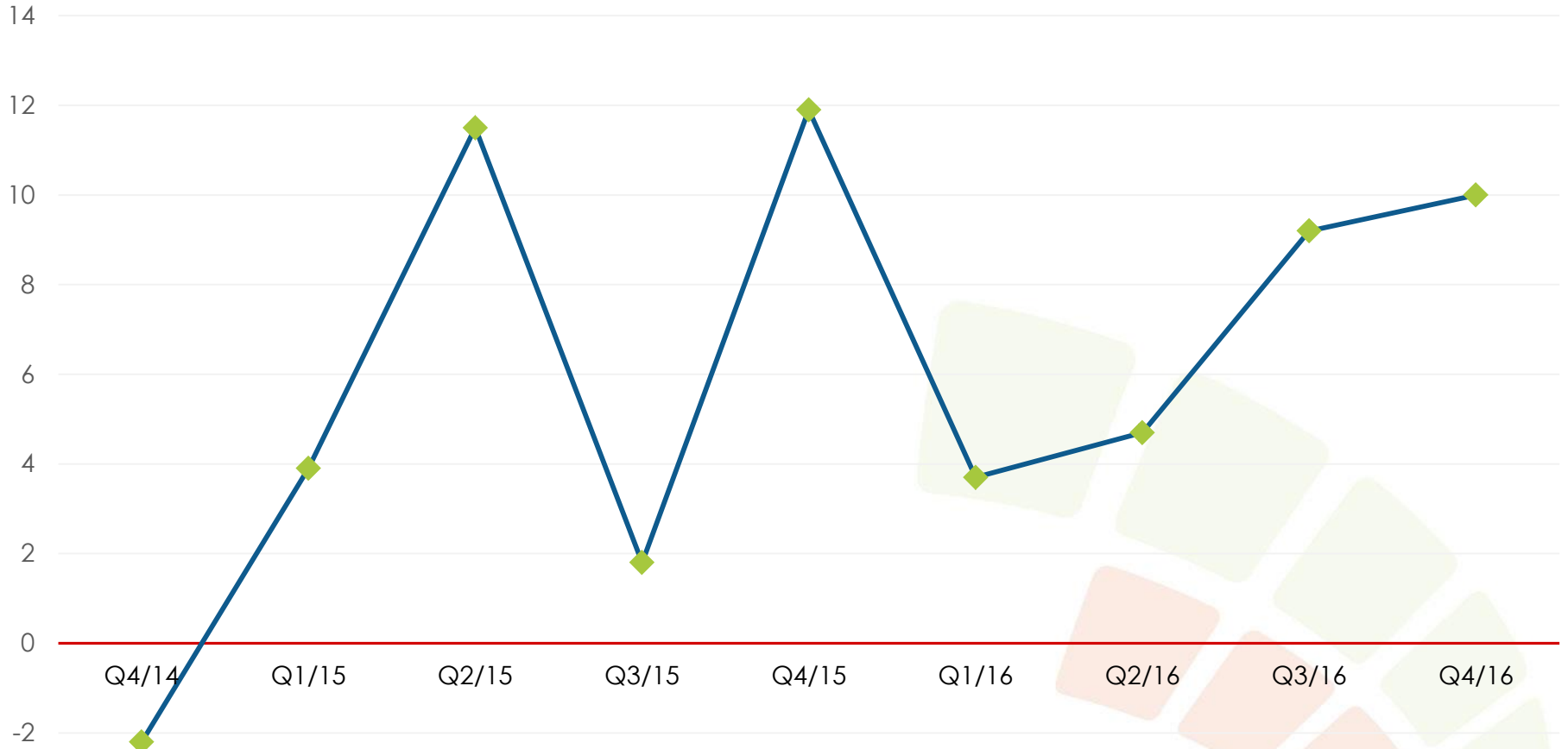
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The colour codes for each country are based on October 2016 values of the Advertising Business Confidence Index. The lowest value (Slovakia, -17) is highlighted in red and the highest value (Spain, +38) in dark green, while all others are marked with different shades that lie within the spectrum. **The colour coding for a specific month is indicative of that country's position relative to the others.** It is not an indication of the absolute confidence level in that country and may change across the EU depending on the highest and the lowest values, meaning that the same value may have a different colour code each month.



Business development over the past 3 months

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



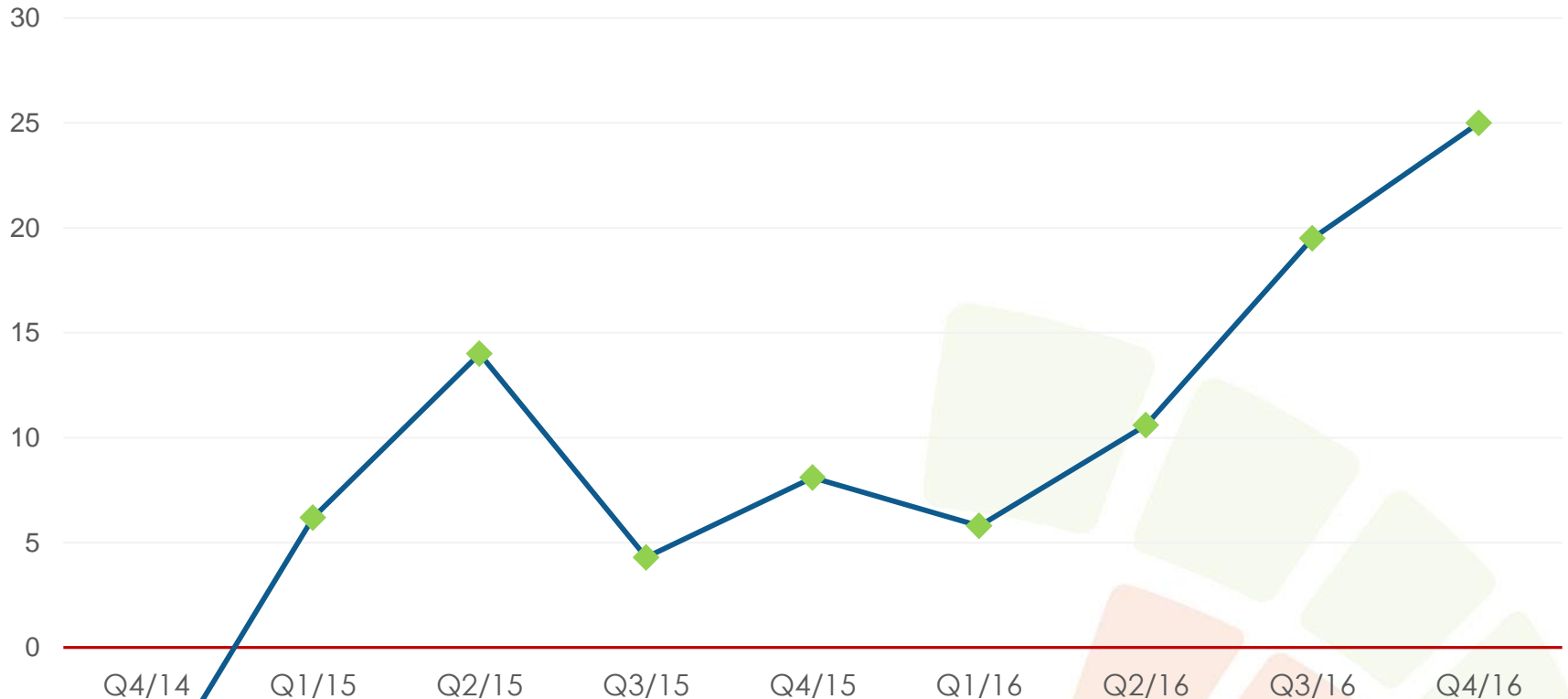
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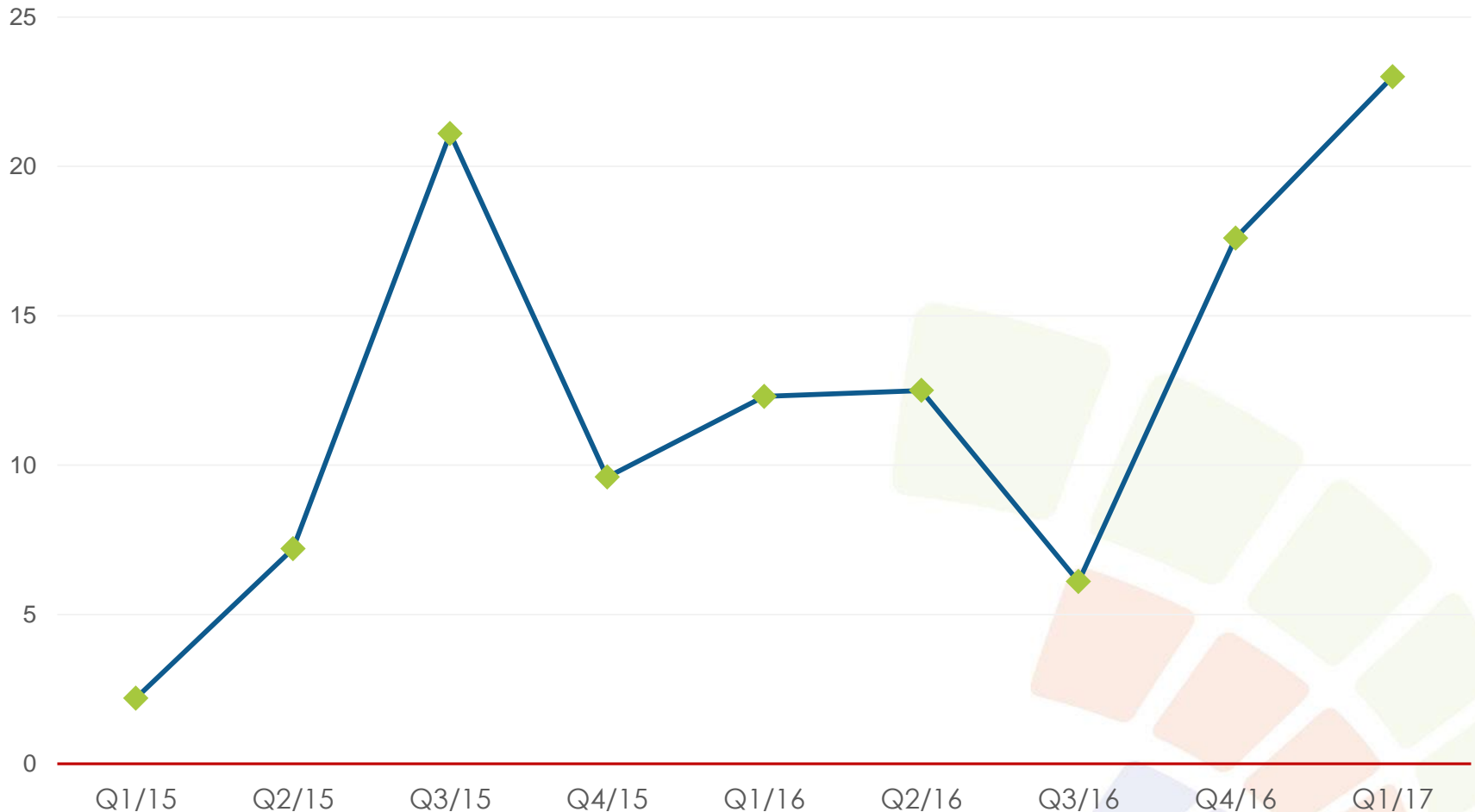
Evolution of demand for advertising services over the past 3 months

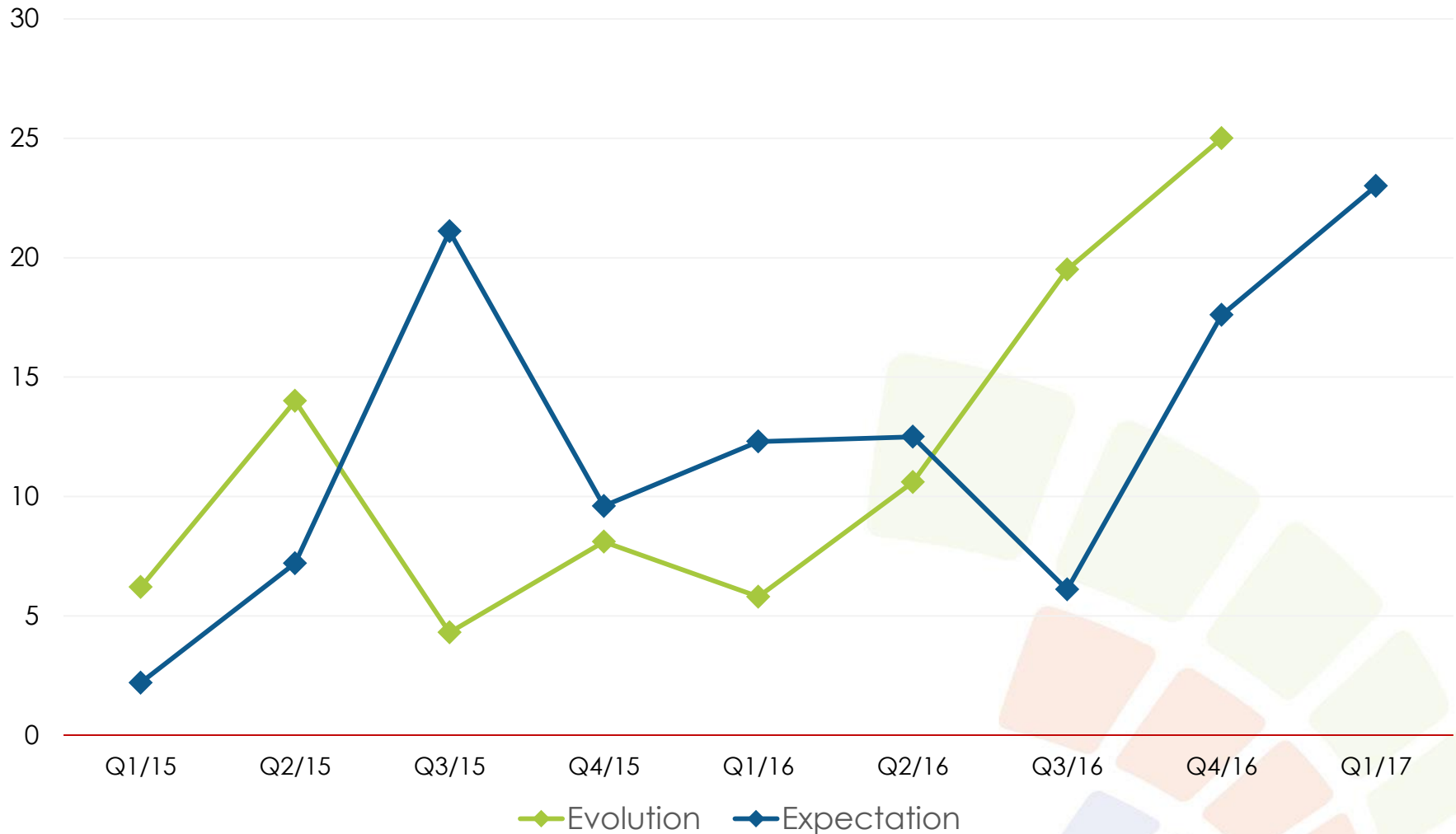
How has your demand (turnover) for your company's services changed over the past 3 months?



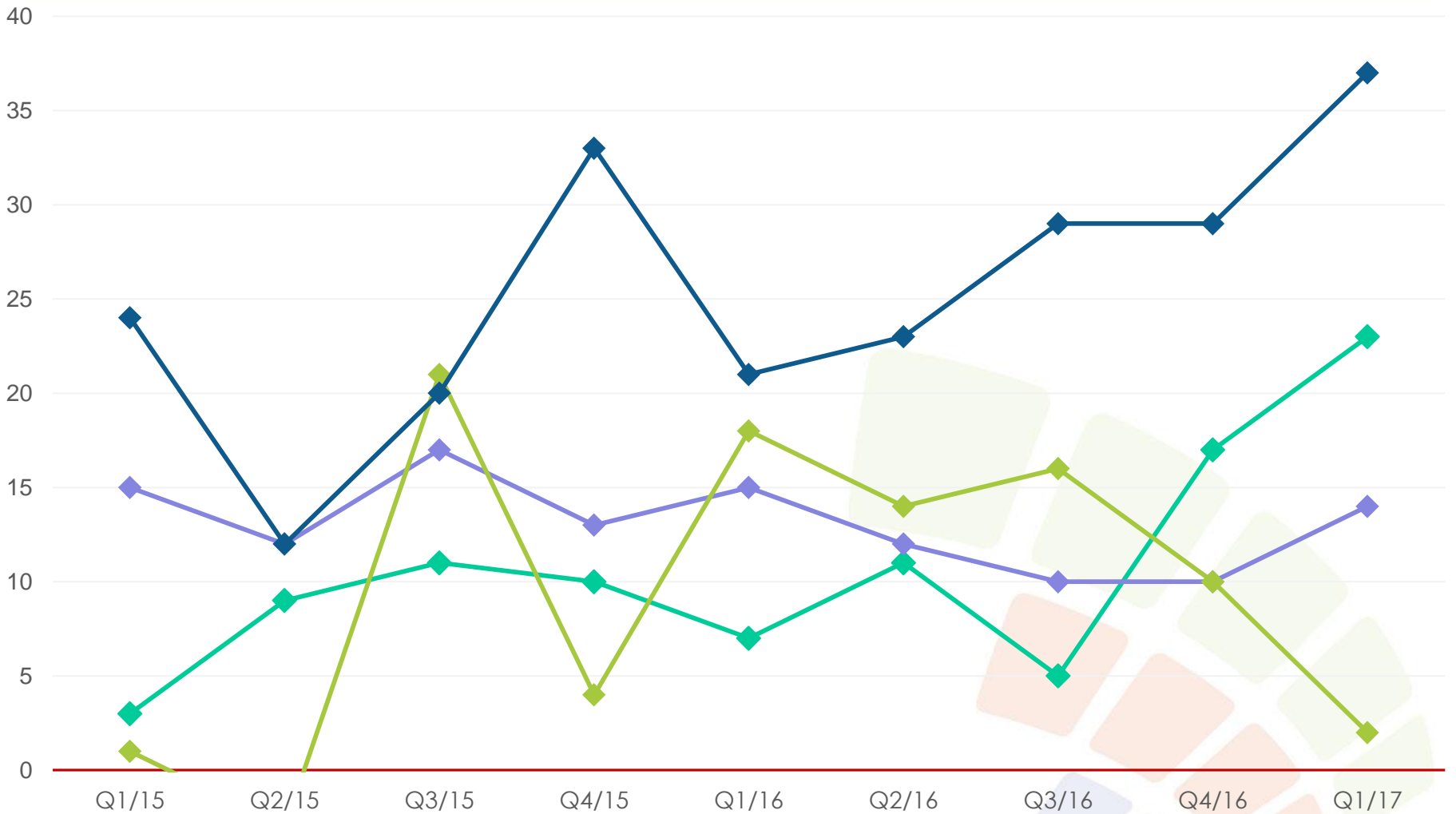
Expectation of advertising demand over the next 3 months

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

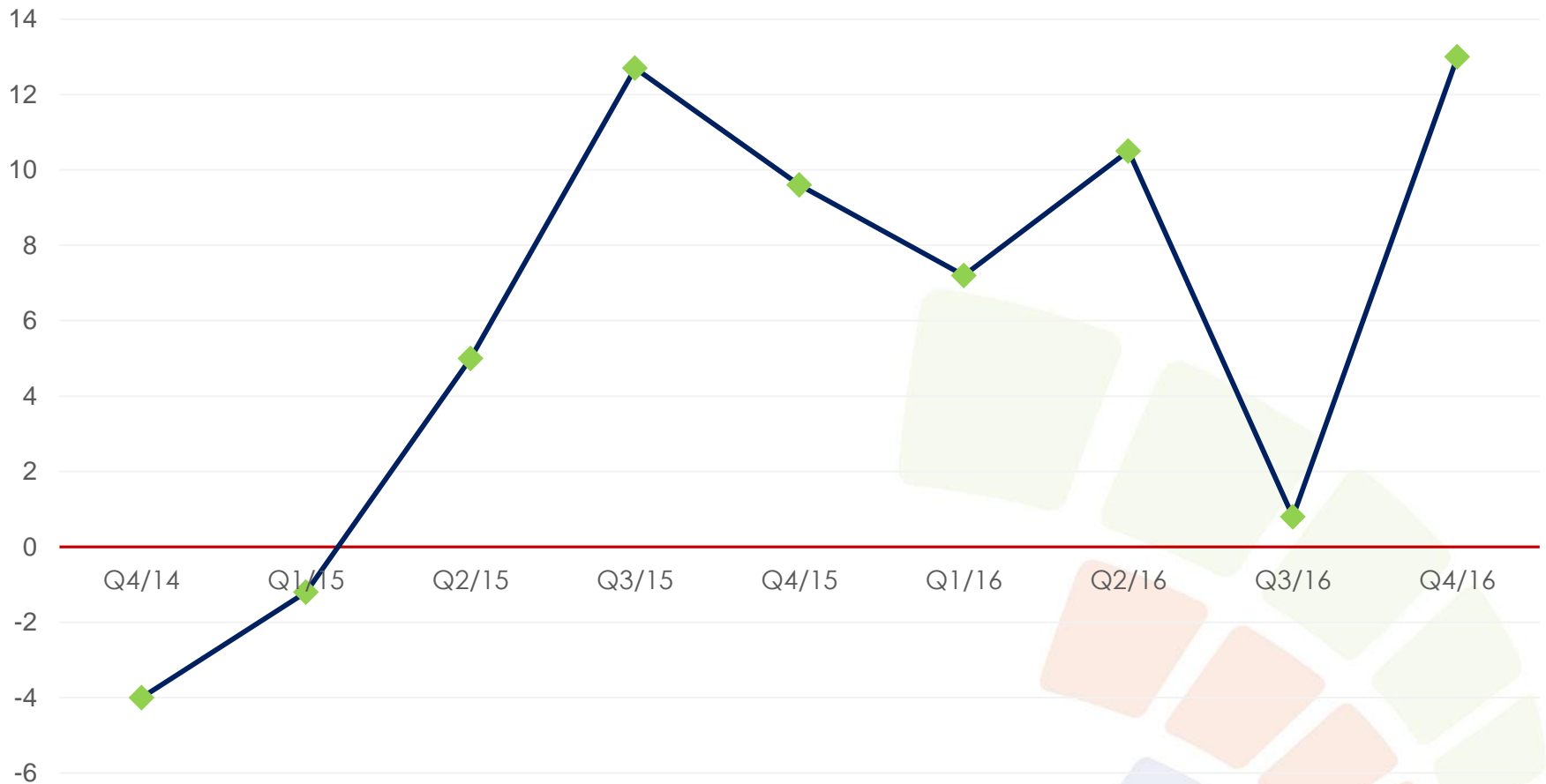




Expectations of advertising demand over the next 3 months



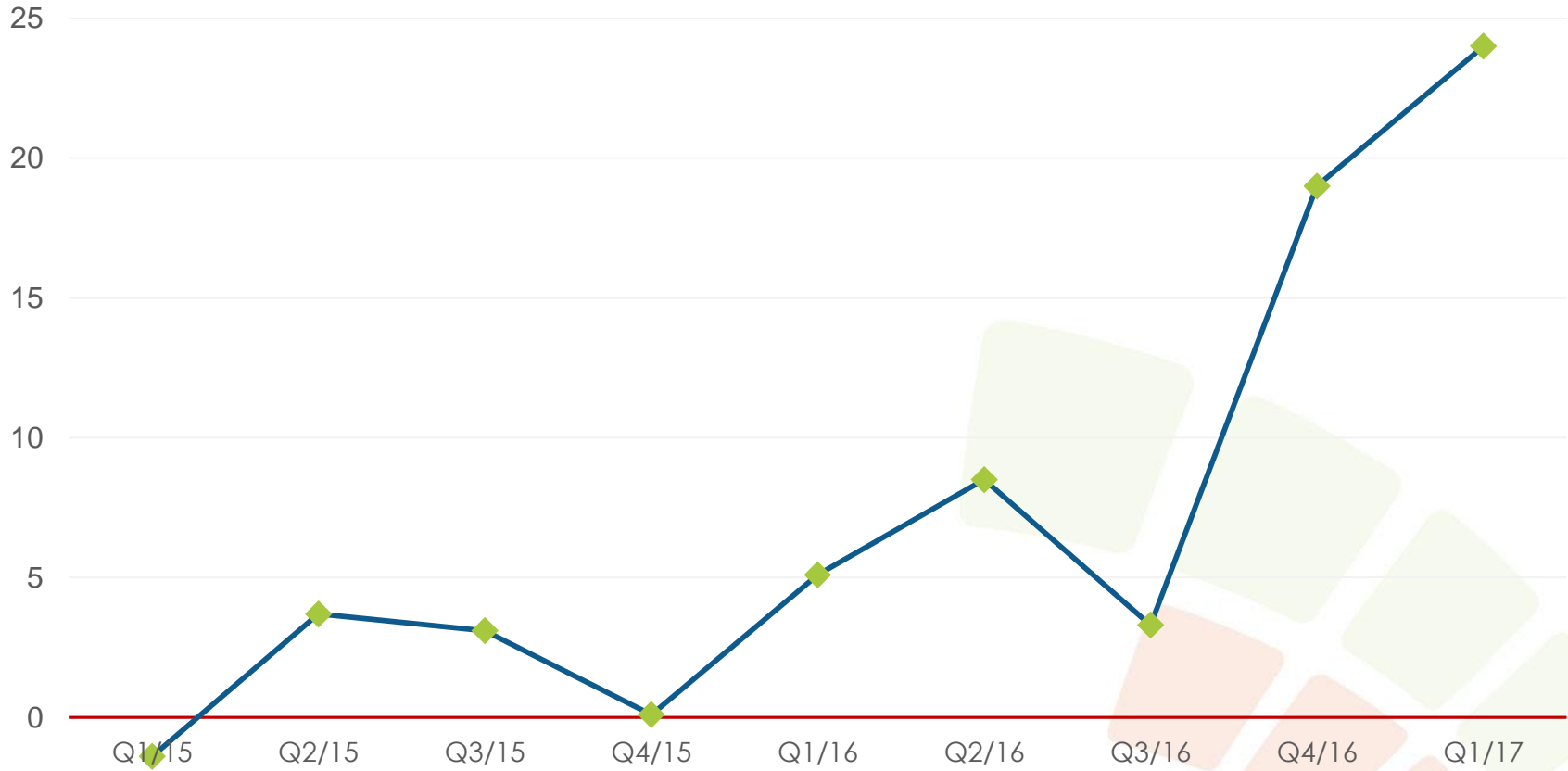
How has your company's total employment changed over the past 3 months?





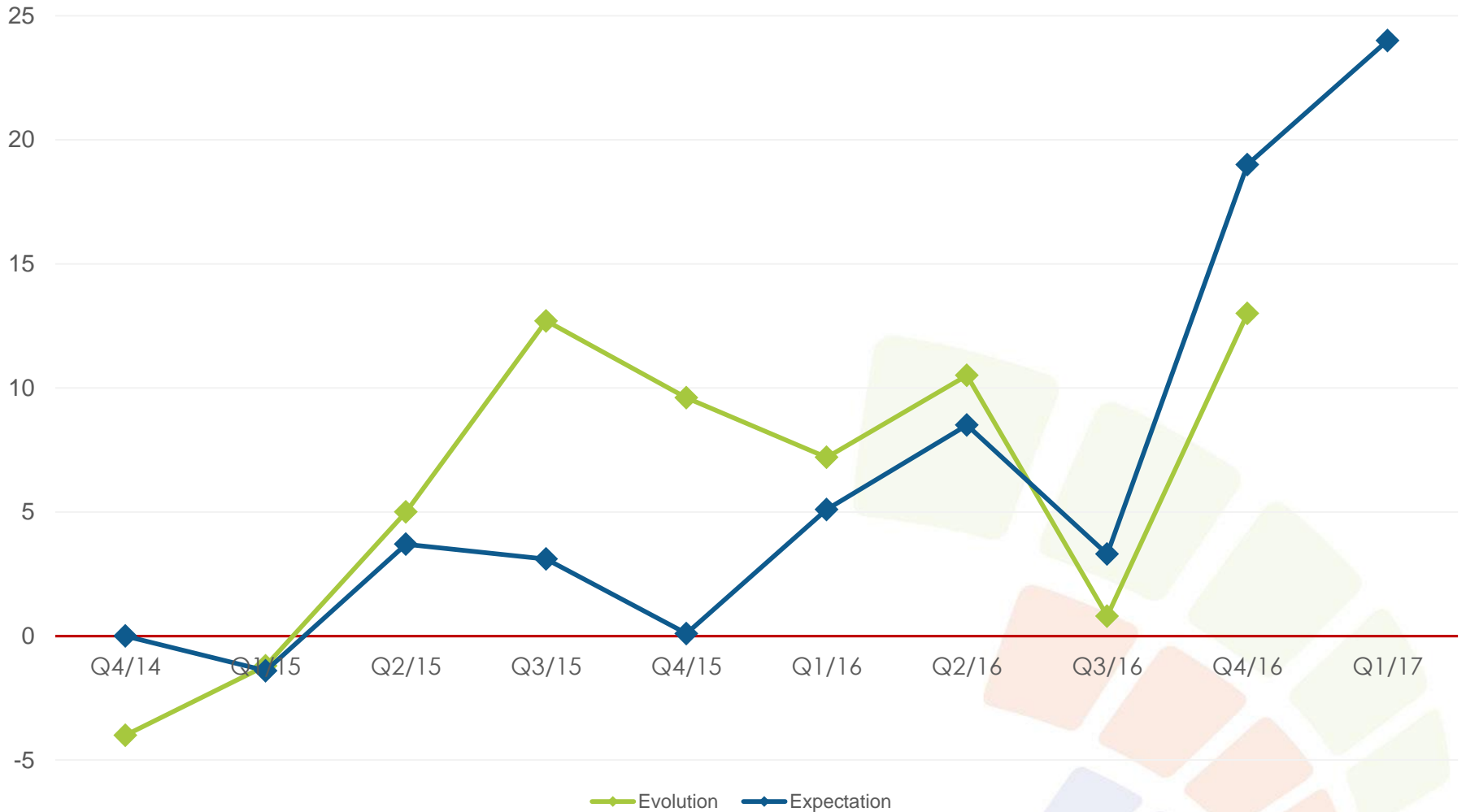
Expectation of employment over the next 3 months

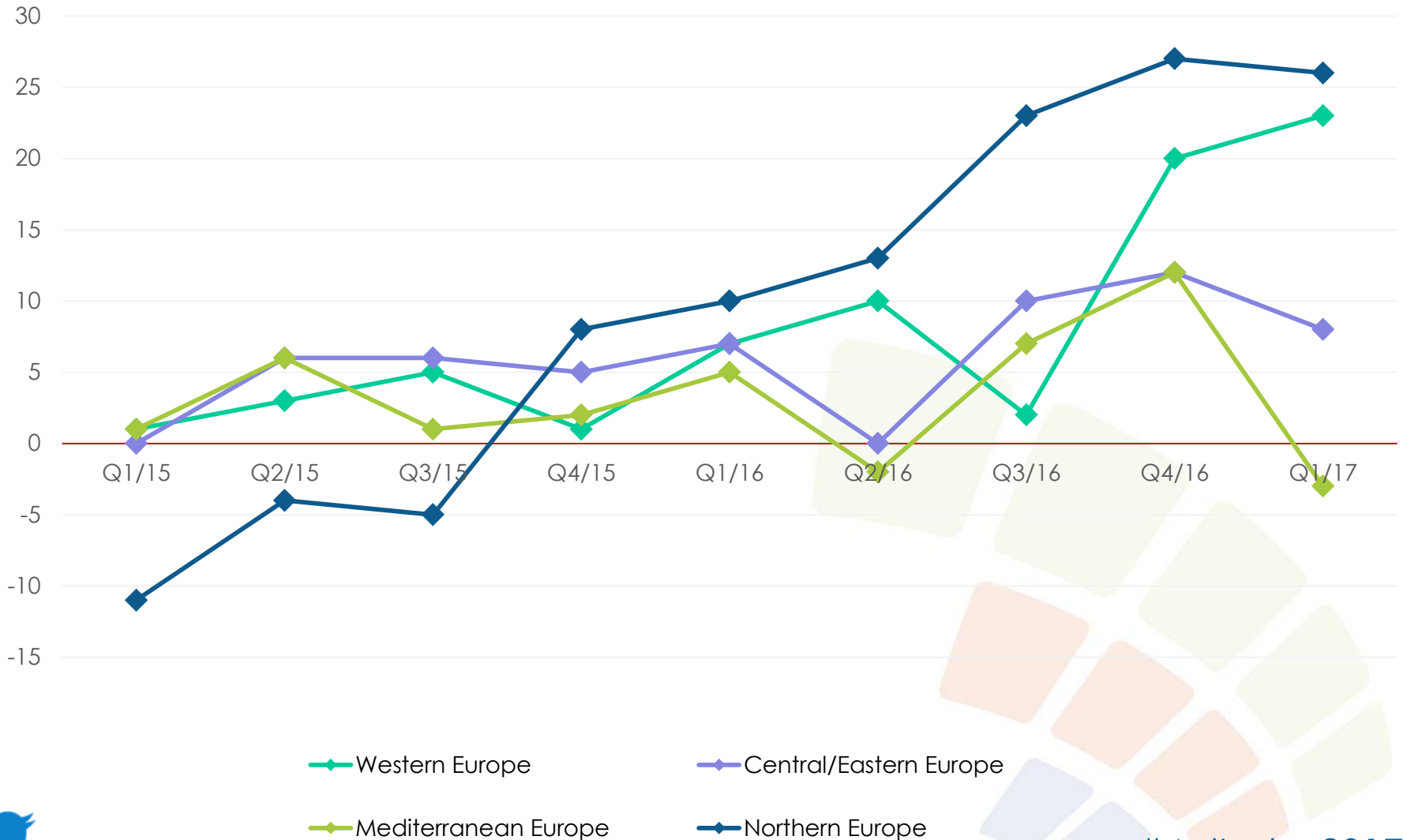
How do you expect your company's employment to change over the next 3 months?



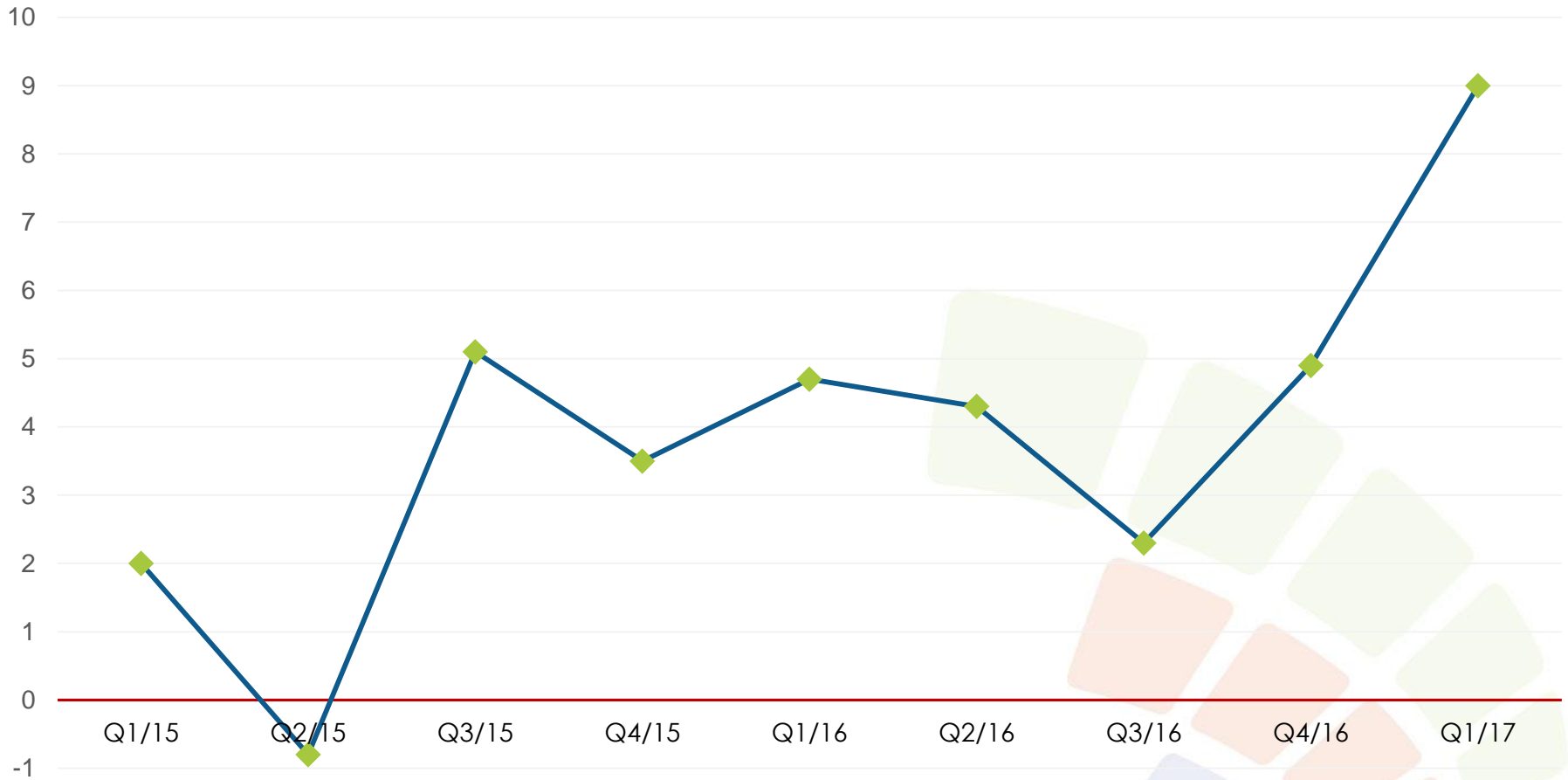


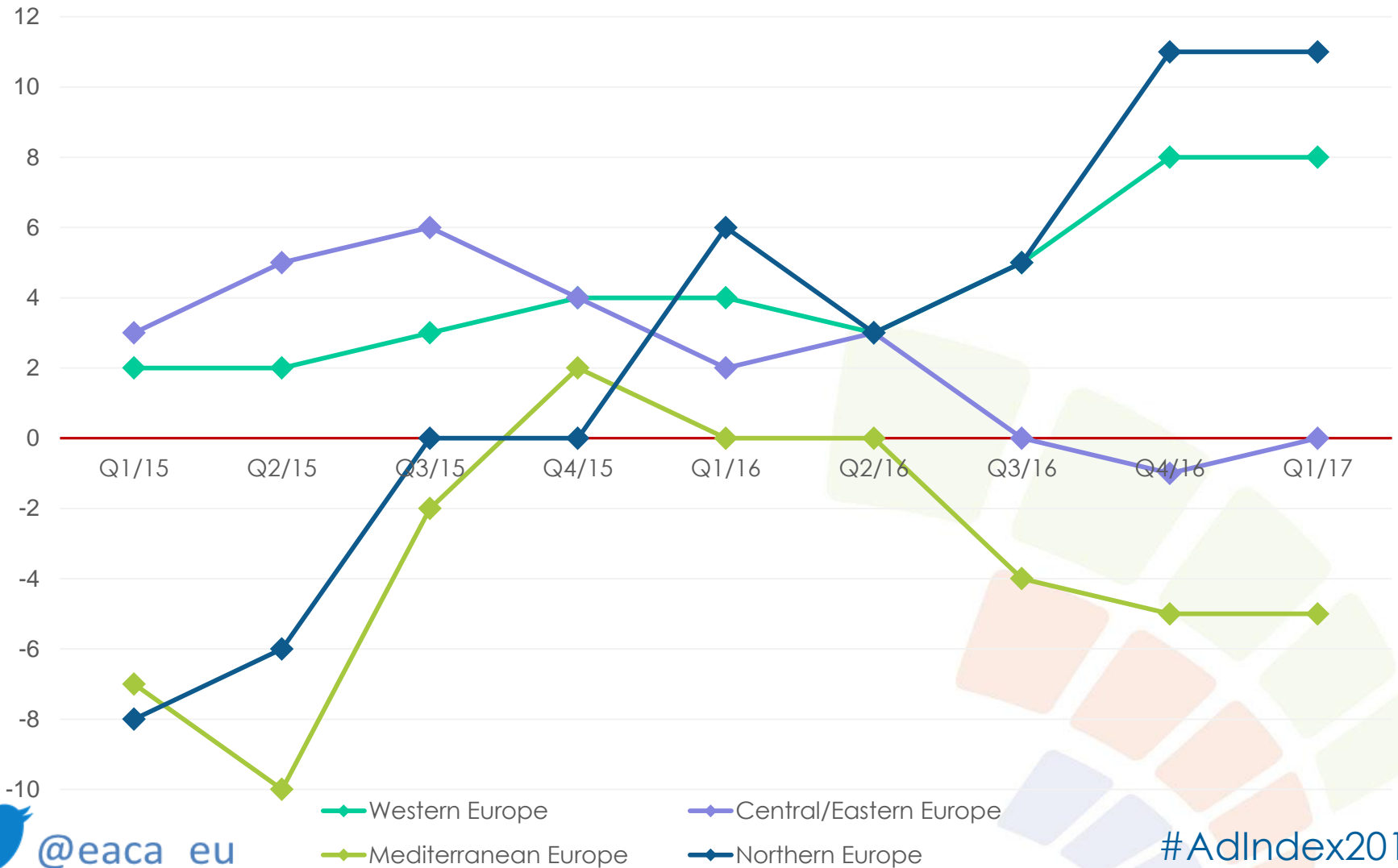
Employment expectation vs employment evolution

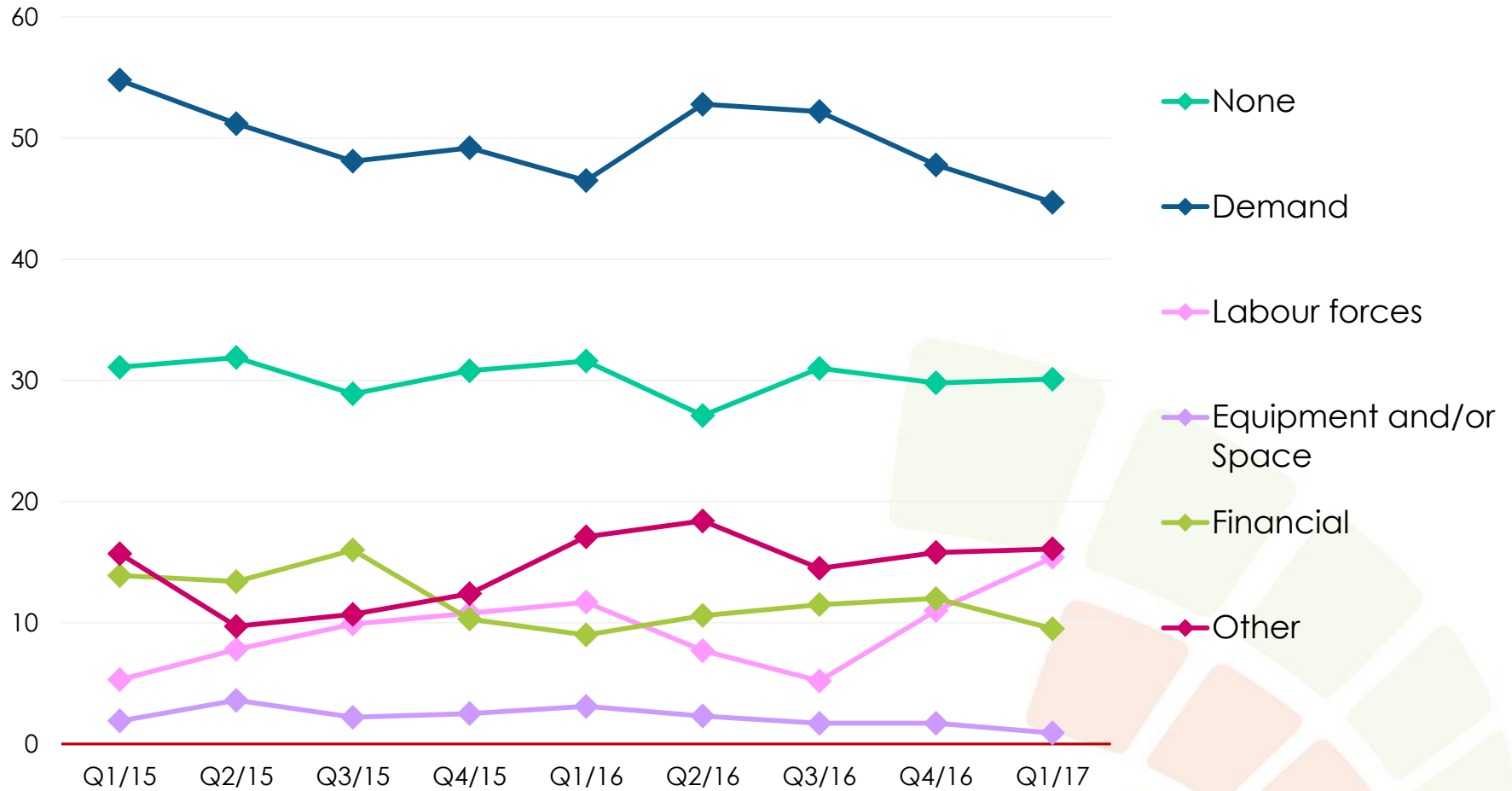




How do you expect prices to change over the next 3 months?







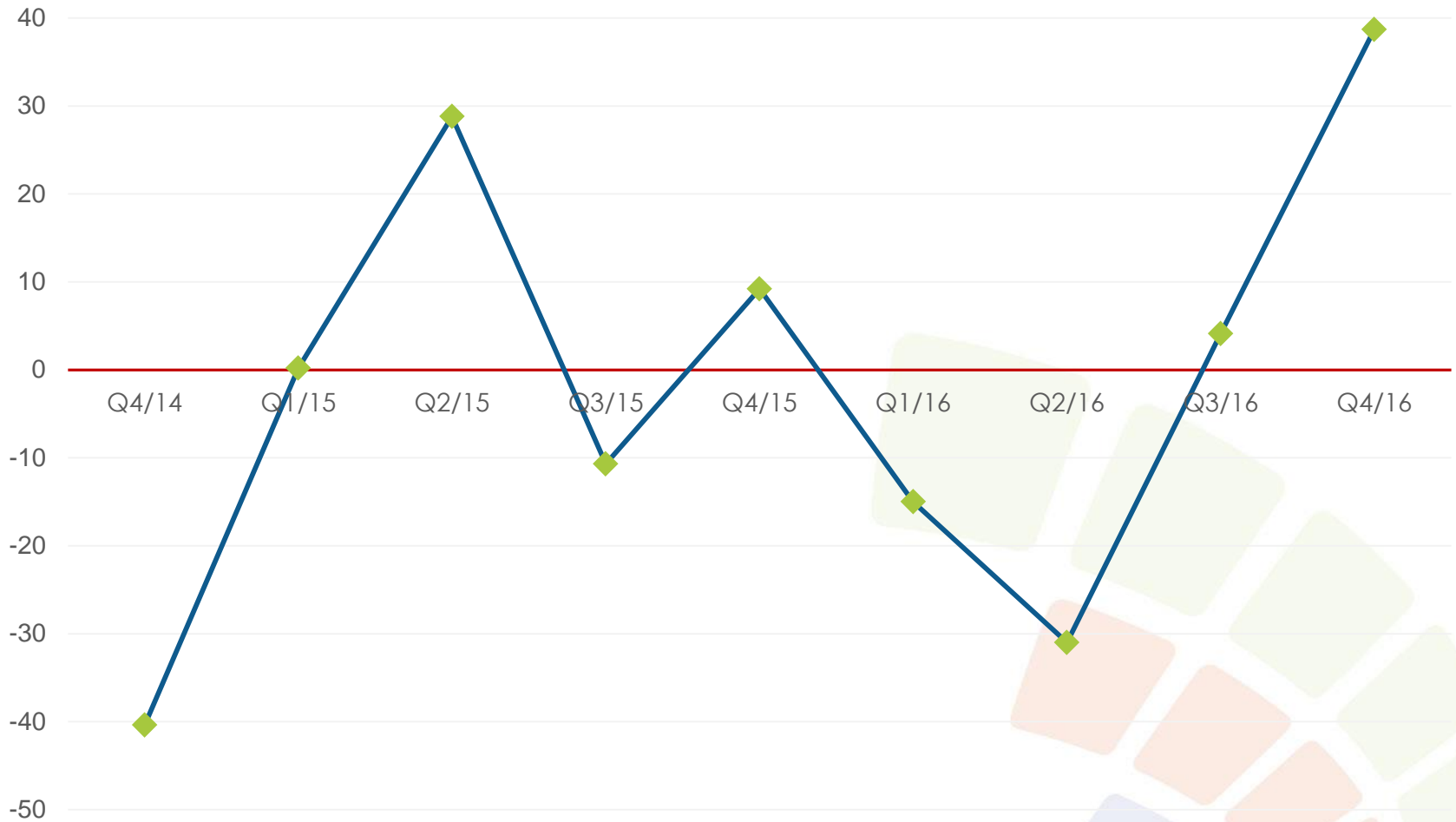


Advertising Business Confidence Index

Country-specific graphs

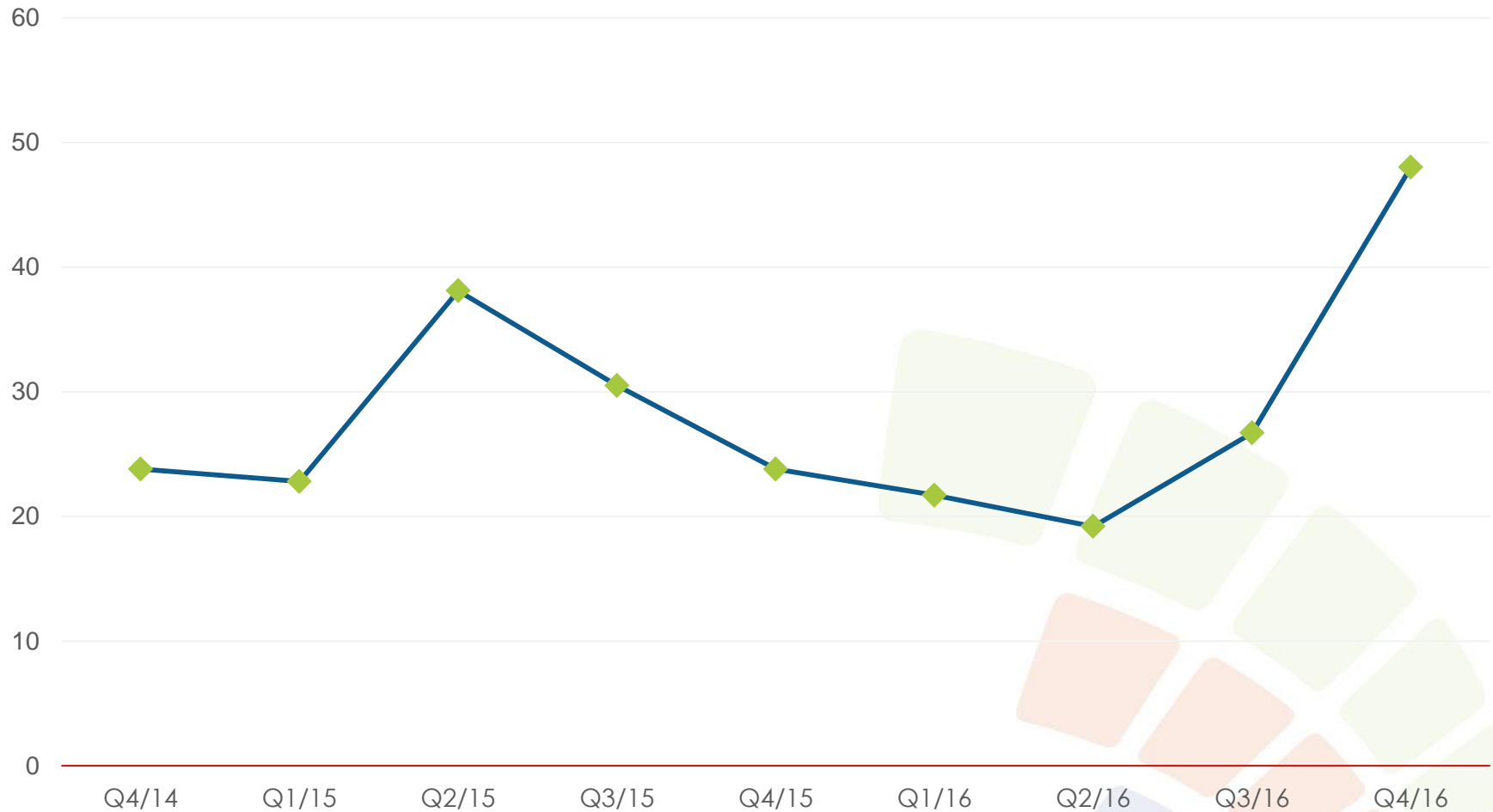


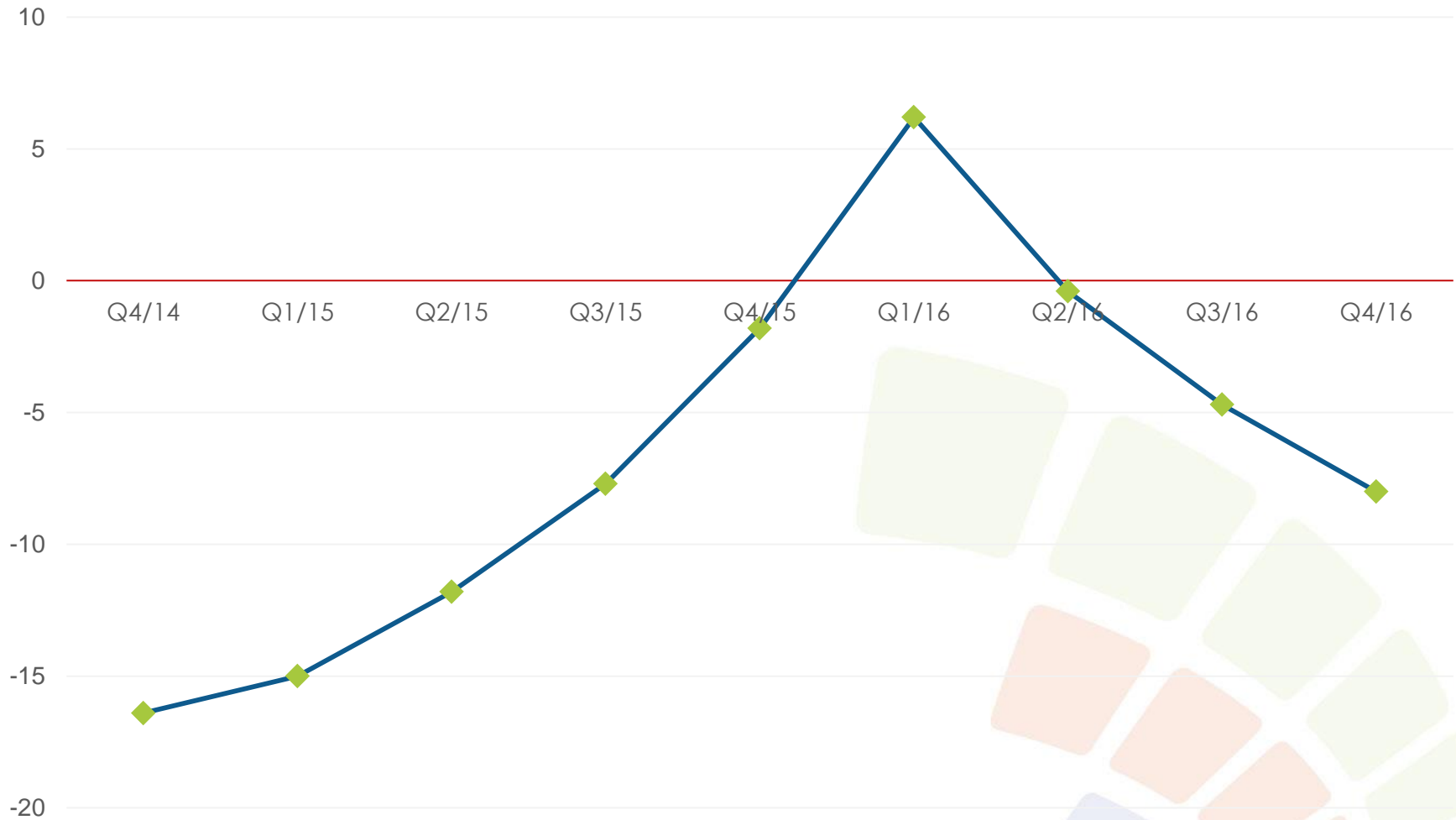
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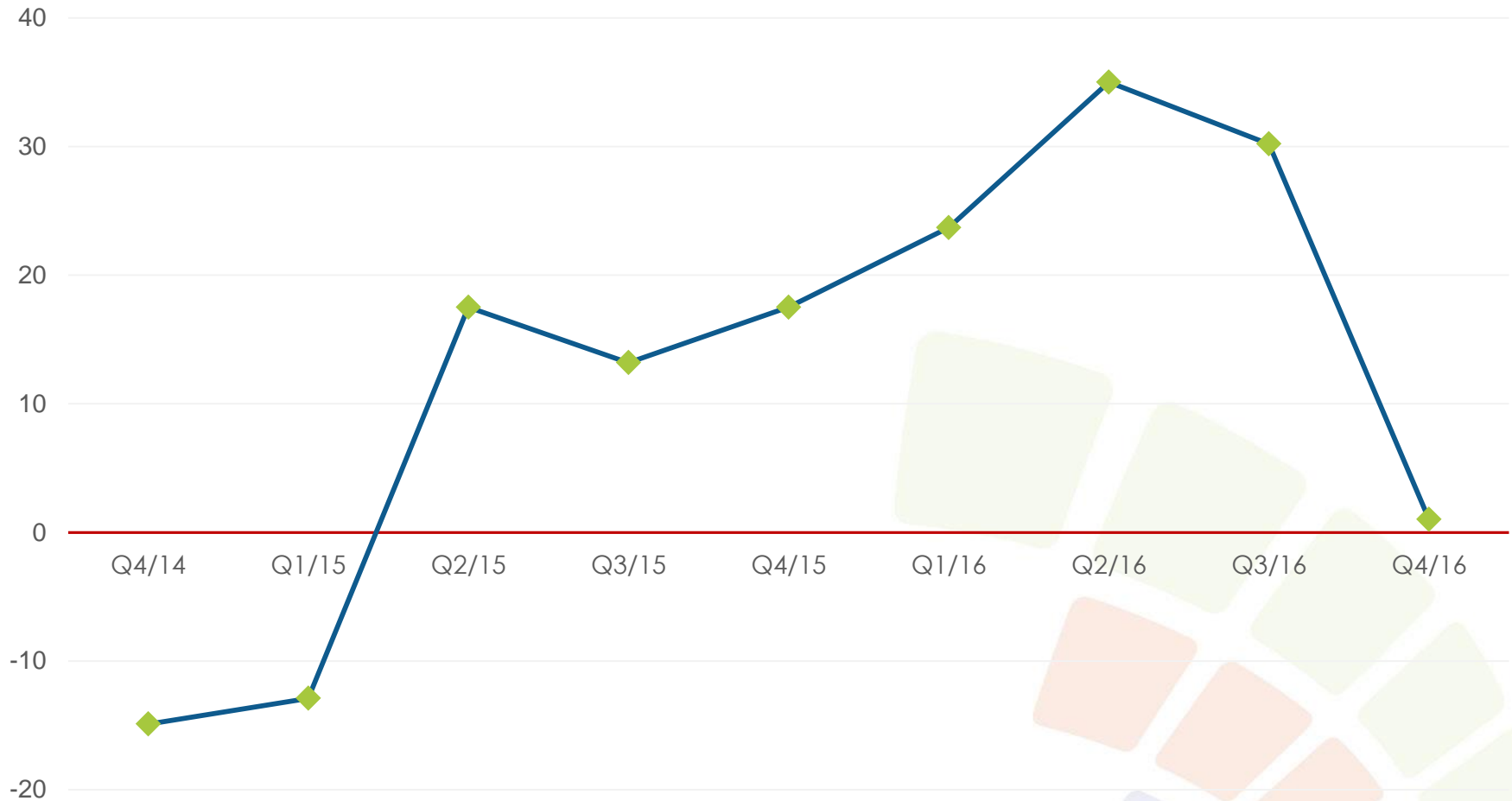
Advertising Business Confidence Index Germany

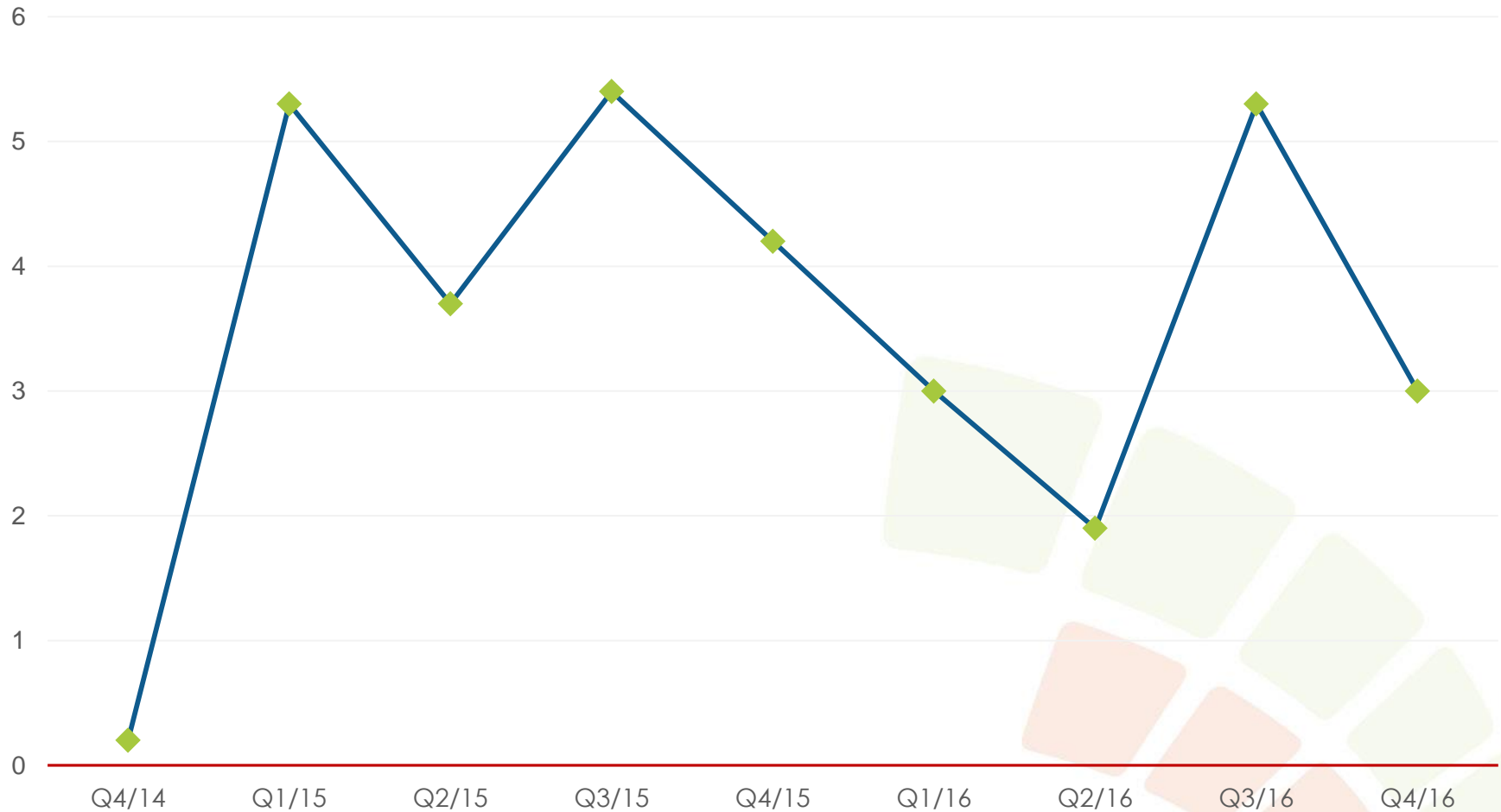






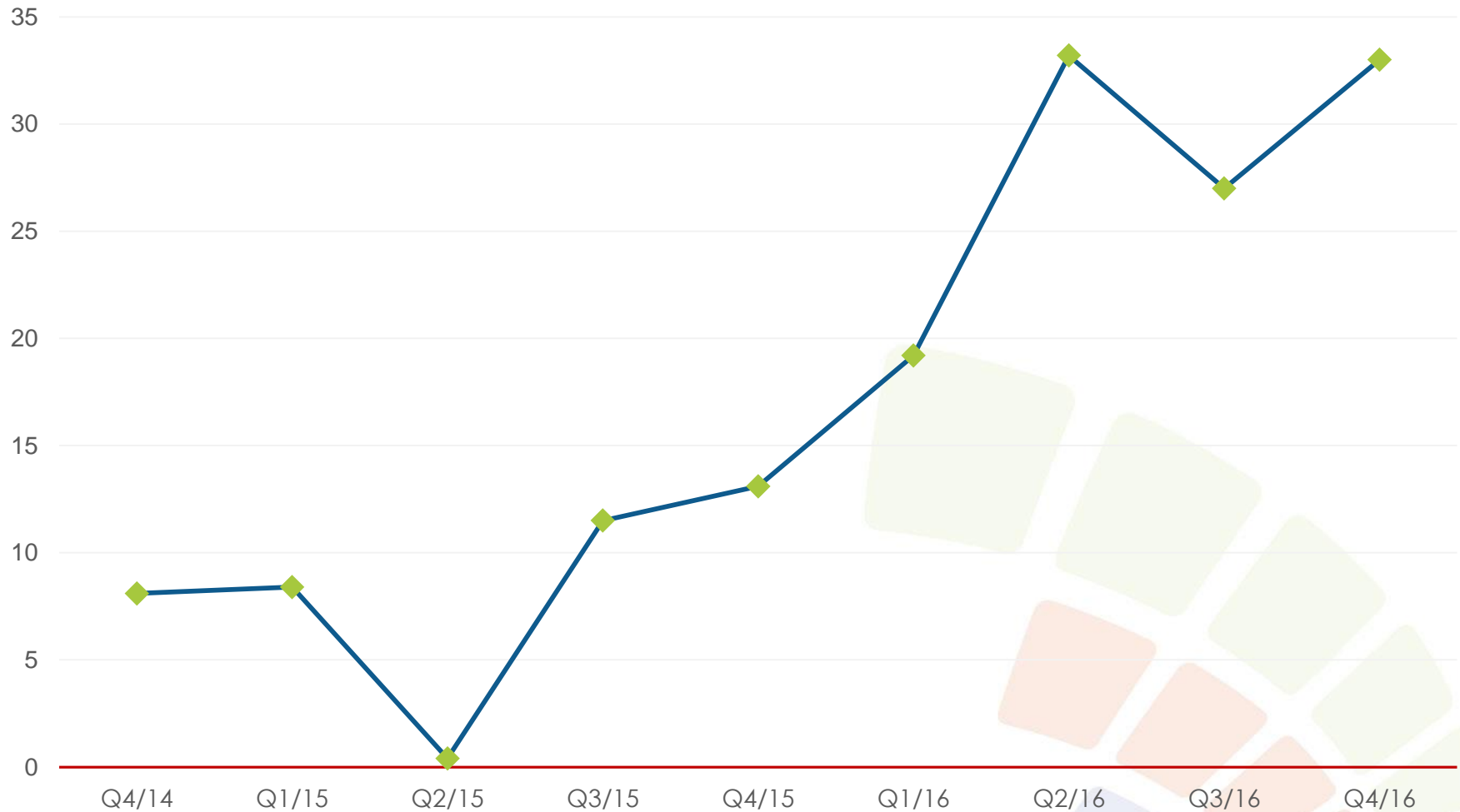
Advertising Business Confidence Index Italy







Advertising Business Confidence Index Sweden





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