



EUROPEAN ASSOCIATION OF  
COMMUNICATIONS AGENCIES

# European Advertising Business Climate Index

Q1 – 2/2019



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#AdIndex2019





# ABOUT

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- Quarterly survey of European advertising and market research companies
- Provides information about:
  - managers' assessment of their **business situation Q1/2019 & forecast for Q2/2019**
  - past and future **challenges in companies' turnover**
  - Anticipated **employment and revenue levels**



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## Regions featured in the Index

- **Based on data provided by companies in the following countries:**  
Austria, Belgium, Bulgaria, Croatia, Czech Republic, Cyprus, Denmark, Estonia, France, Germany, Greece, Italy, Latvia, Lithuania, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden and United Kingdom
- **Total sample size: 1,449 of European advertising and market research companies**
- **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)**

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

% of positive answers – % of negative answers

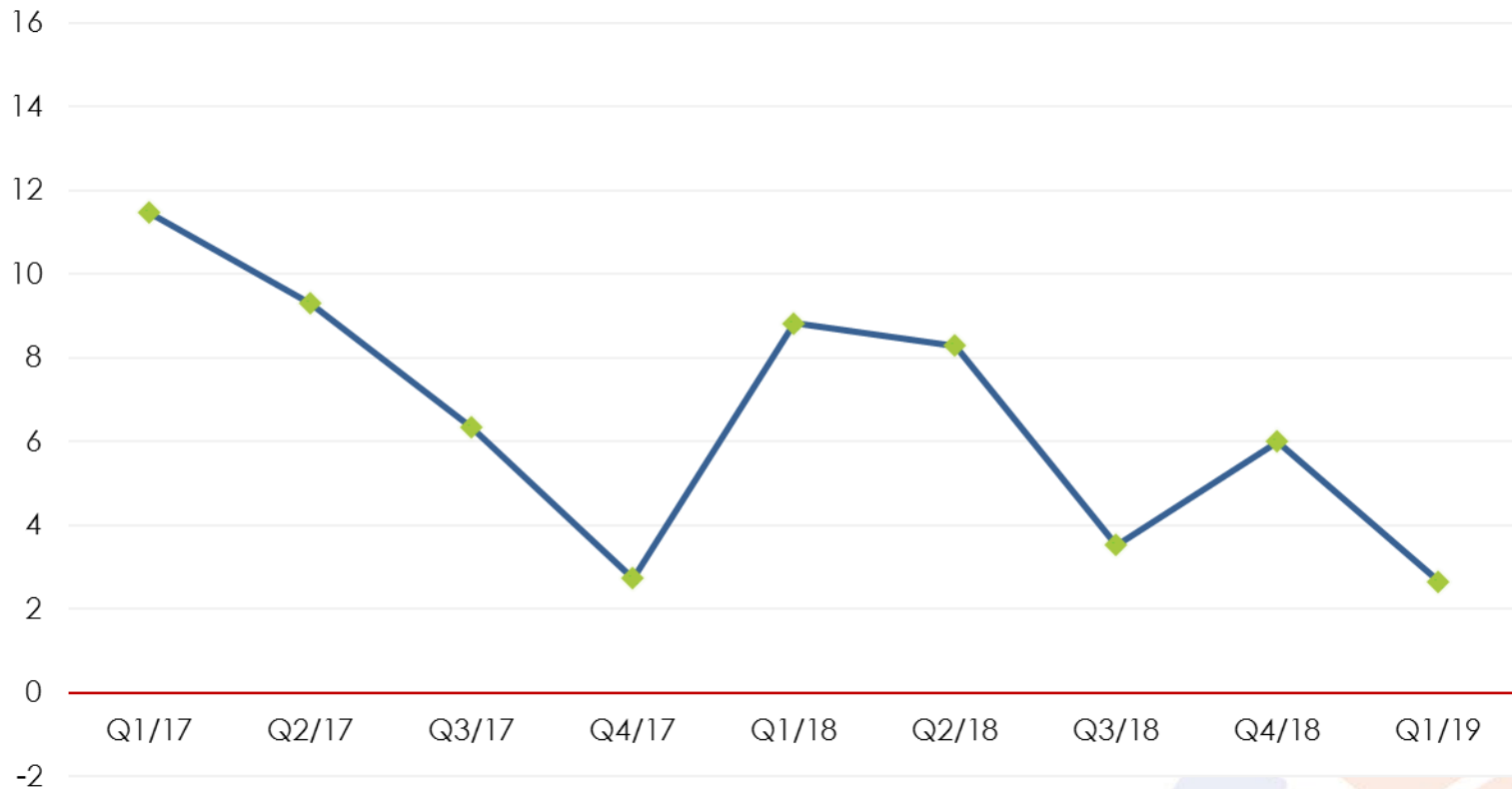


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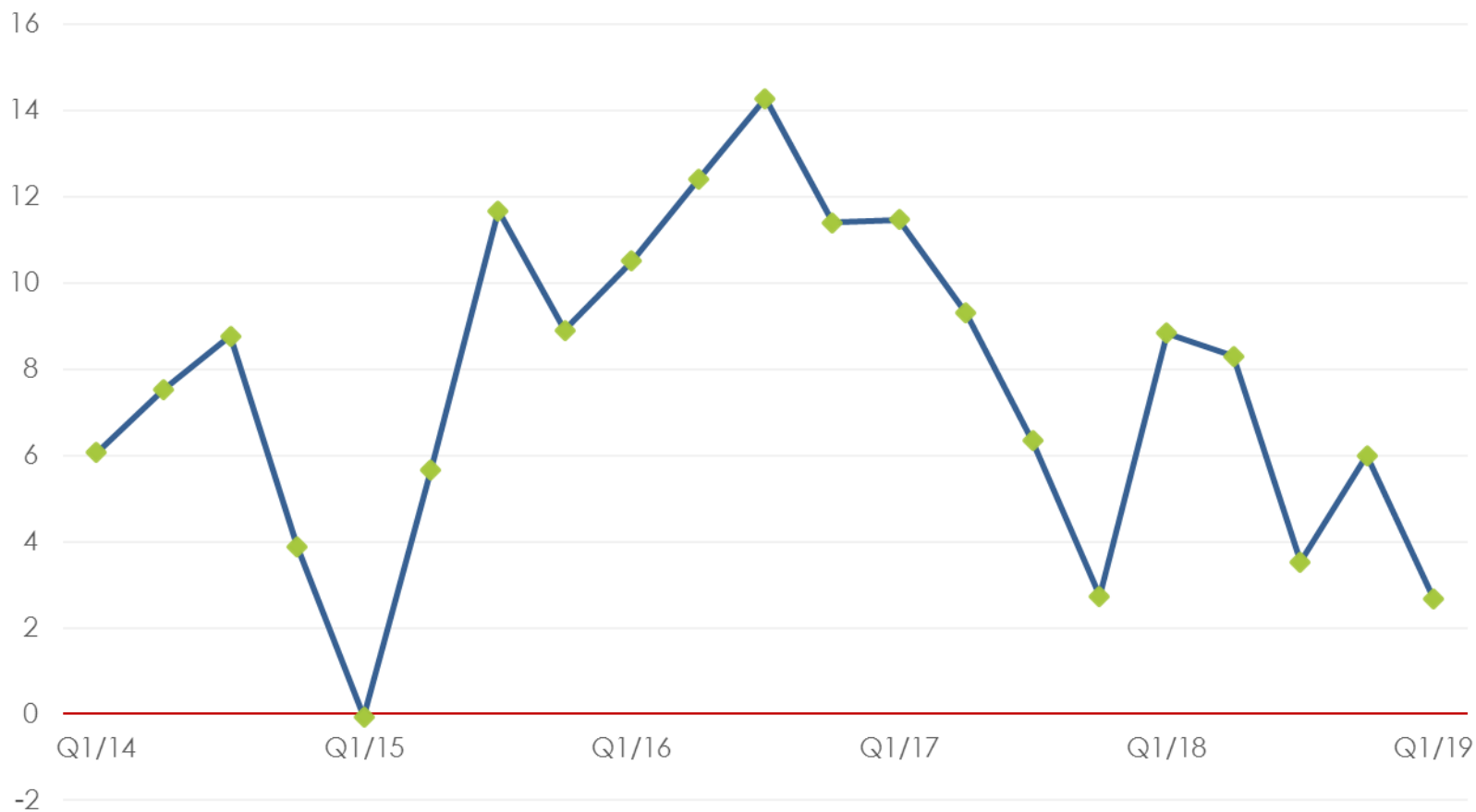
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General confidence index (the average of answers to the questions below)

- How has your business situation developed over the past 3 months?
- How has demand for your company's services changer over the past 3 months?
- How do you expect the demand for your company's services to change over the next 3 months?



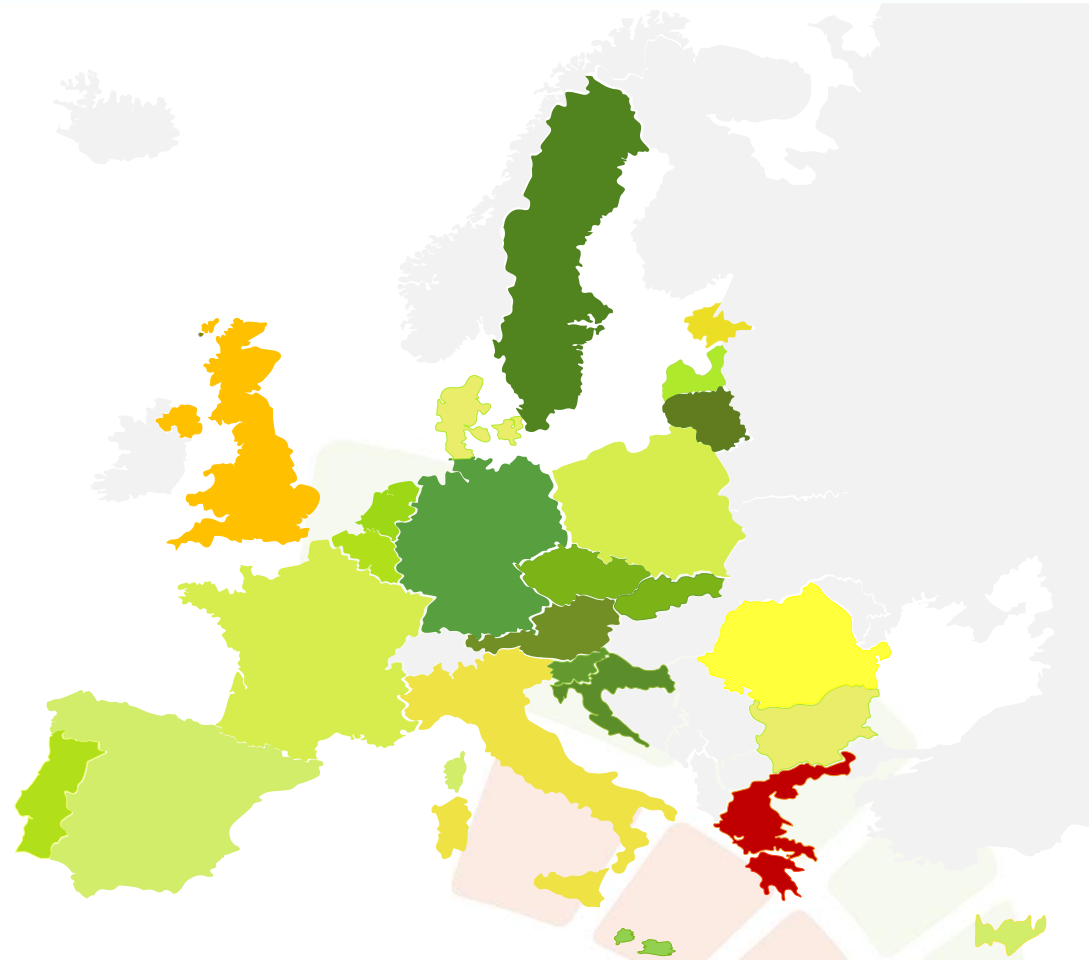
General confidence index



Austria: 23.2	Latvia: 7.6
Belgium: 7.3	Lithuania: 32.2
Bulgaria: 2.7	Malta: 17.3
Croatia: 20.9	Netherlands: 9.3
Czech Republic: 14.9	Poland: 3.5
Cyprus: 4.5	Portugal: 9.5
Denmark: 2.2	Romania: -0.9
Estonia: -3.1	Slovakia: 15.9
France: 3.5	Slovenia: 19.1
Germany: 19.2	Spain: 4.3
Greece: -26.8	Sweden: 25.3
Italy: -2.6	United Kingdom: -6.9



Lowest → Highest



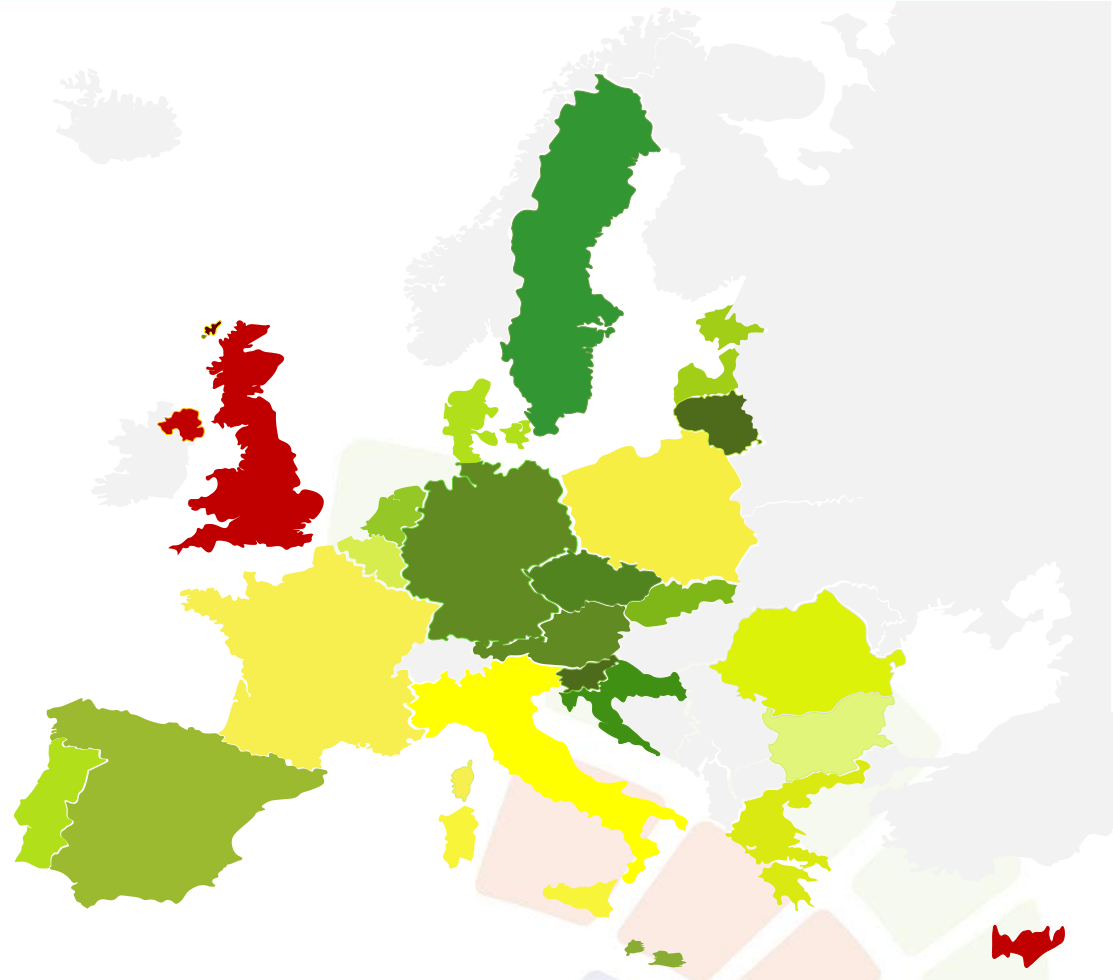
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The colour codes for each country are based on the average of October, November and December 2018 values of the Advertising Business Climate Index. The lowest value (Greece, -26.8) is highlighted in dark red and the highest value (Lithuania, +32.2) 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.

Austria: 19.6	Latvia: 8.9
Belgium: 4.9	Lithuania: 27.2
Bulgaria: 2.6	Malta: 10.5
Croatia: 20.4	Netherlands: 8.1
Czech Republic: 20.1	Poland: -1.7
Cyprus: -21.9	Portugal: 5.7
Denmark: 5.3	Romania: 3.4
Estonia: 7.7	Slovakia: 14.6
France: -1.2	Slovenia: 23.6
Germany: 19	Spain: 13.3
Greece: 3.5	Sweden: 22.7
Italy: -0.6	United Kingdom: -28.7



Lowest → Highest

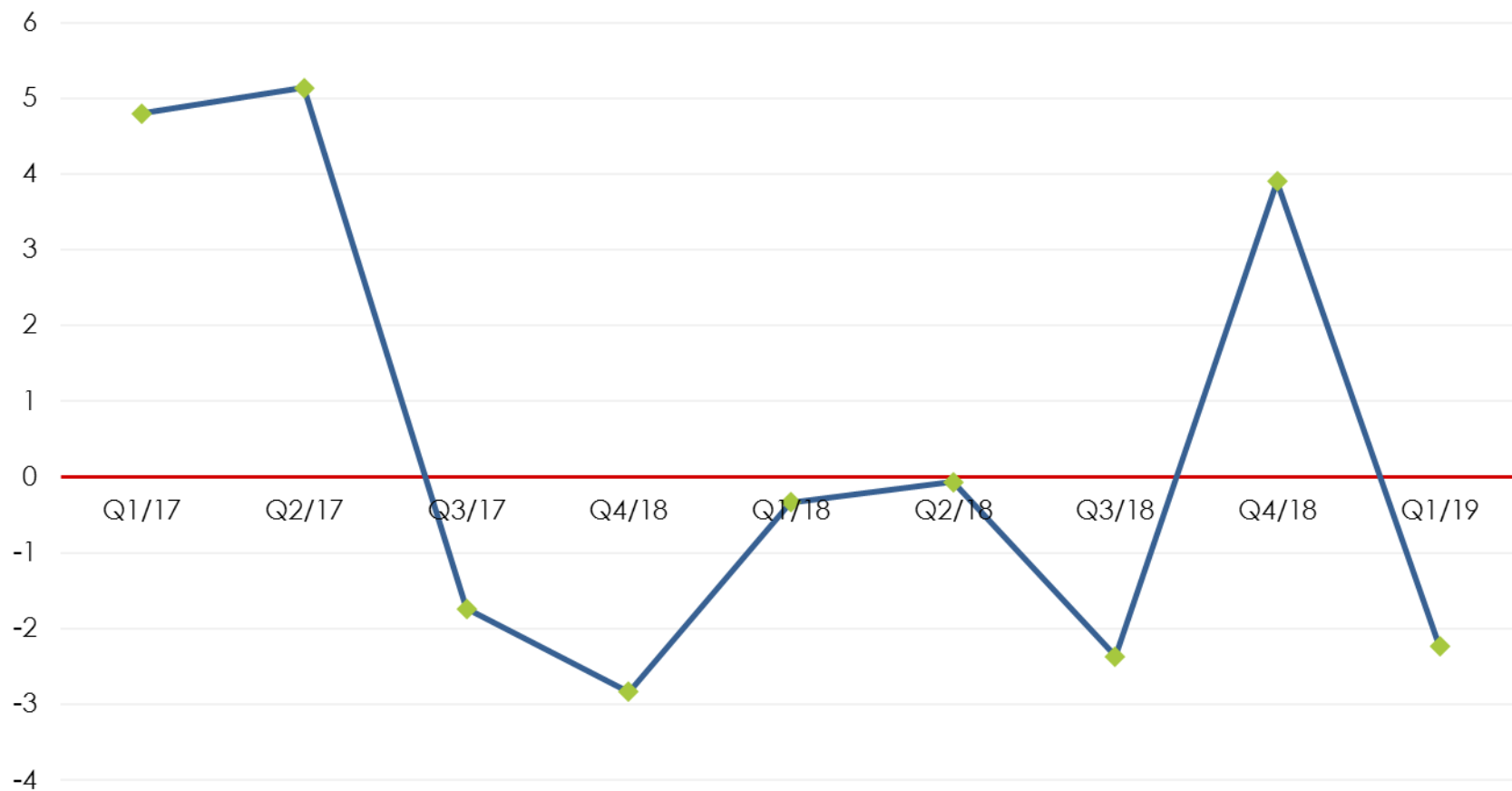


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The colour codes for each country are based on the average of January, February and March 2019 values of the Advertising Business Climate Index. The lowest value (The UK, -28.7) is highlighted in dark red and the highest value (Lithuania, +27.2) in 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.

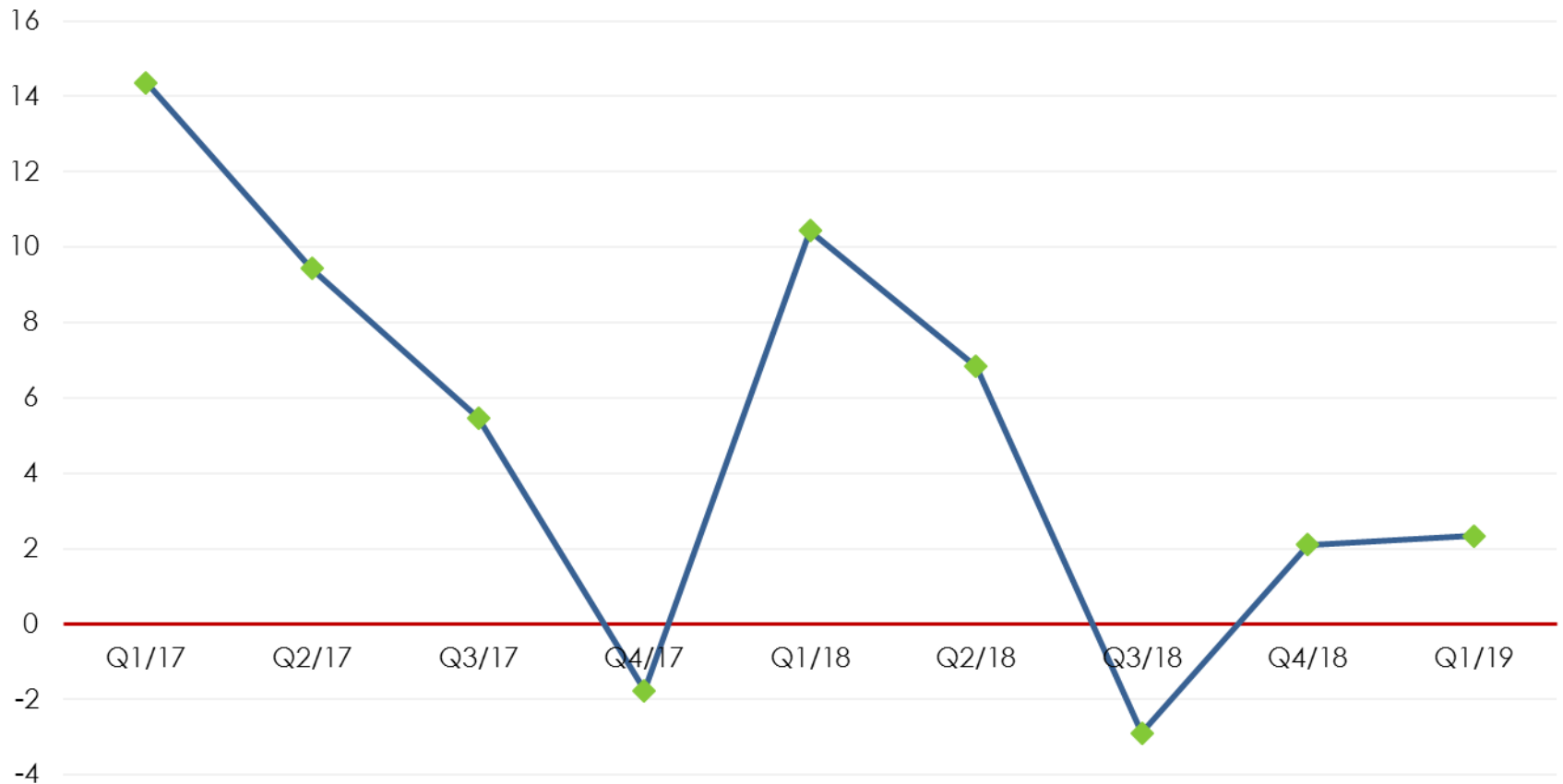


How has your business situation developed over the past 3 months?



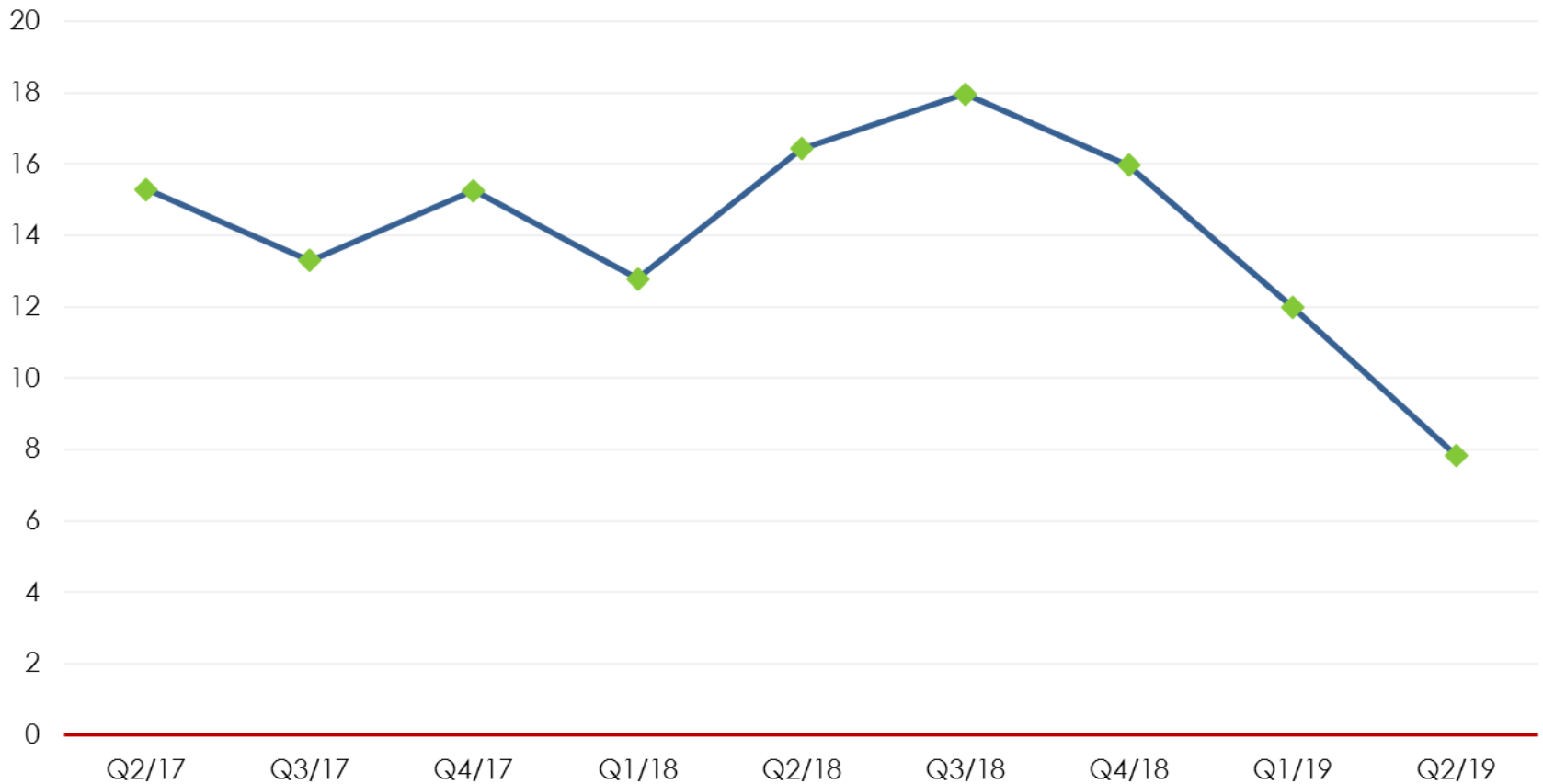
# Evolution of demand for advertising services over the past 3 months

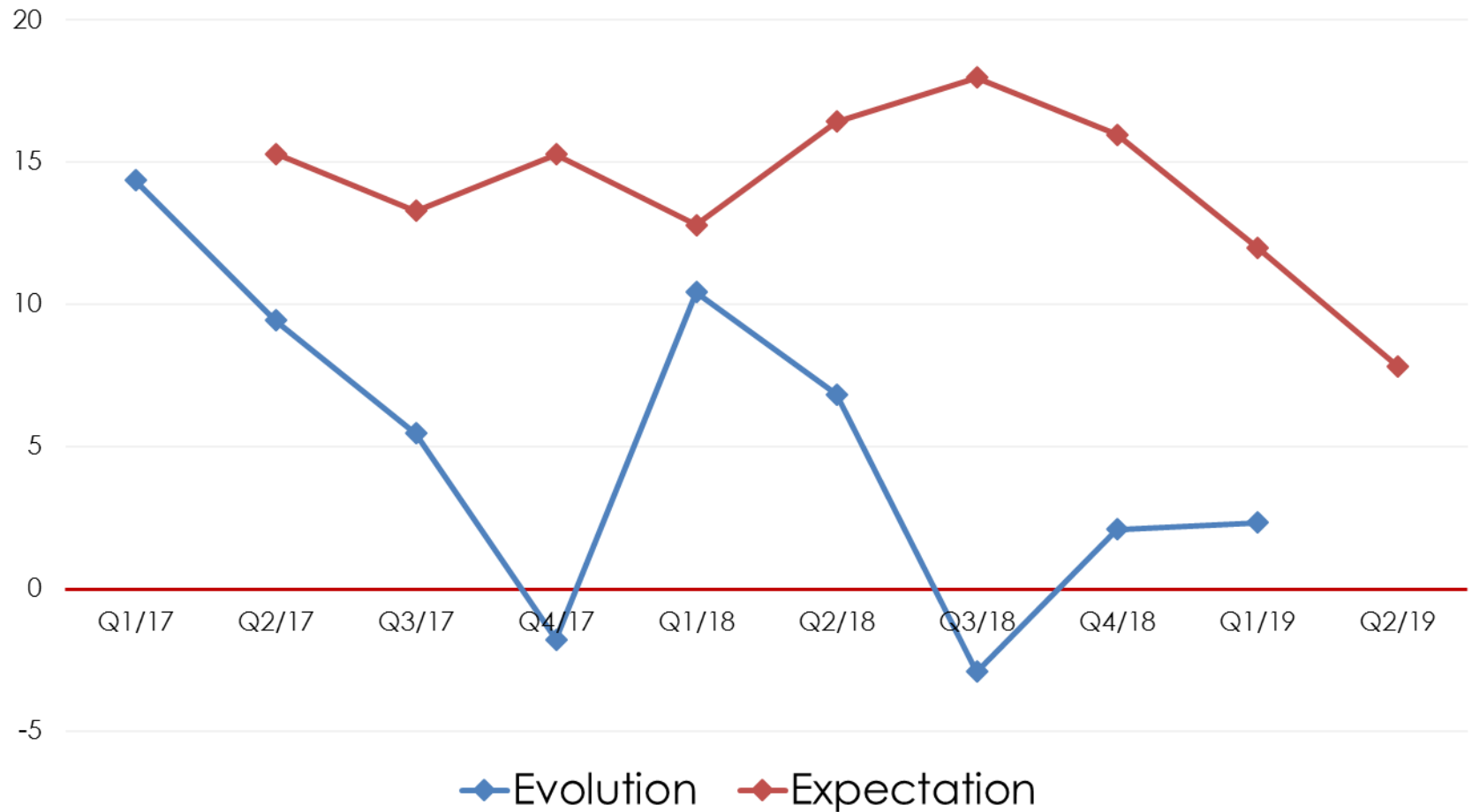
How has demand (turnover) for your company's services changed over the past 3 months?



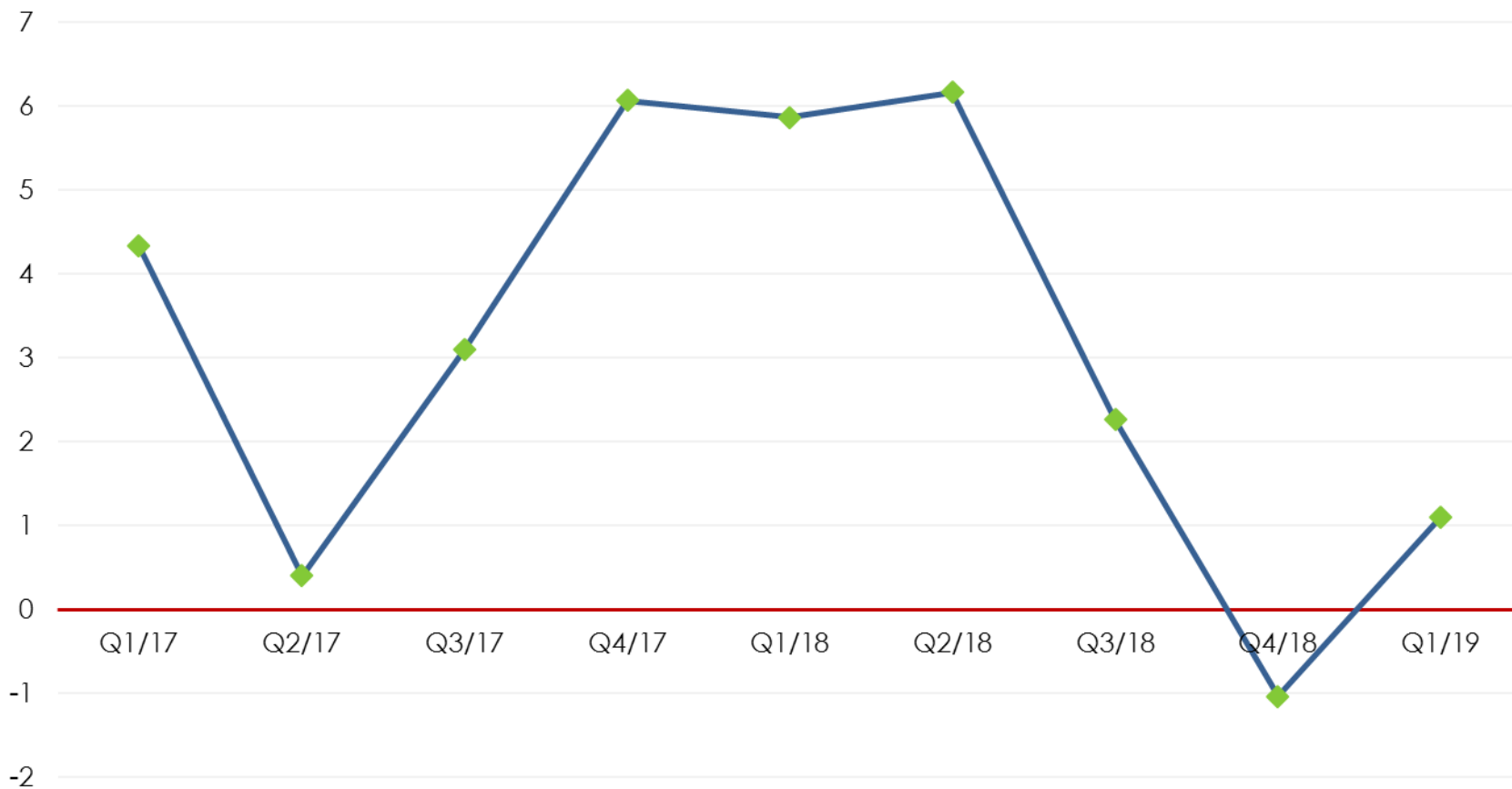
# Expectation of advertising demand over the next 3 months

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

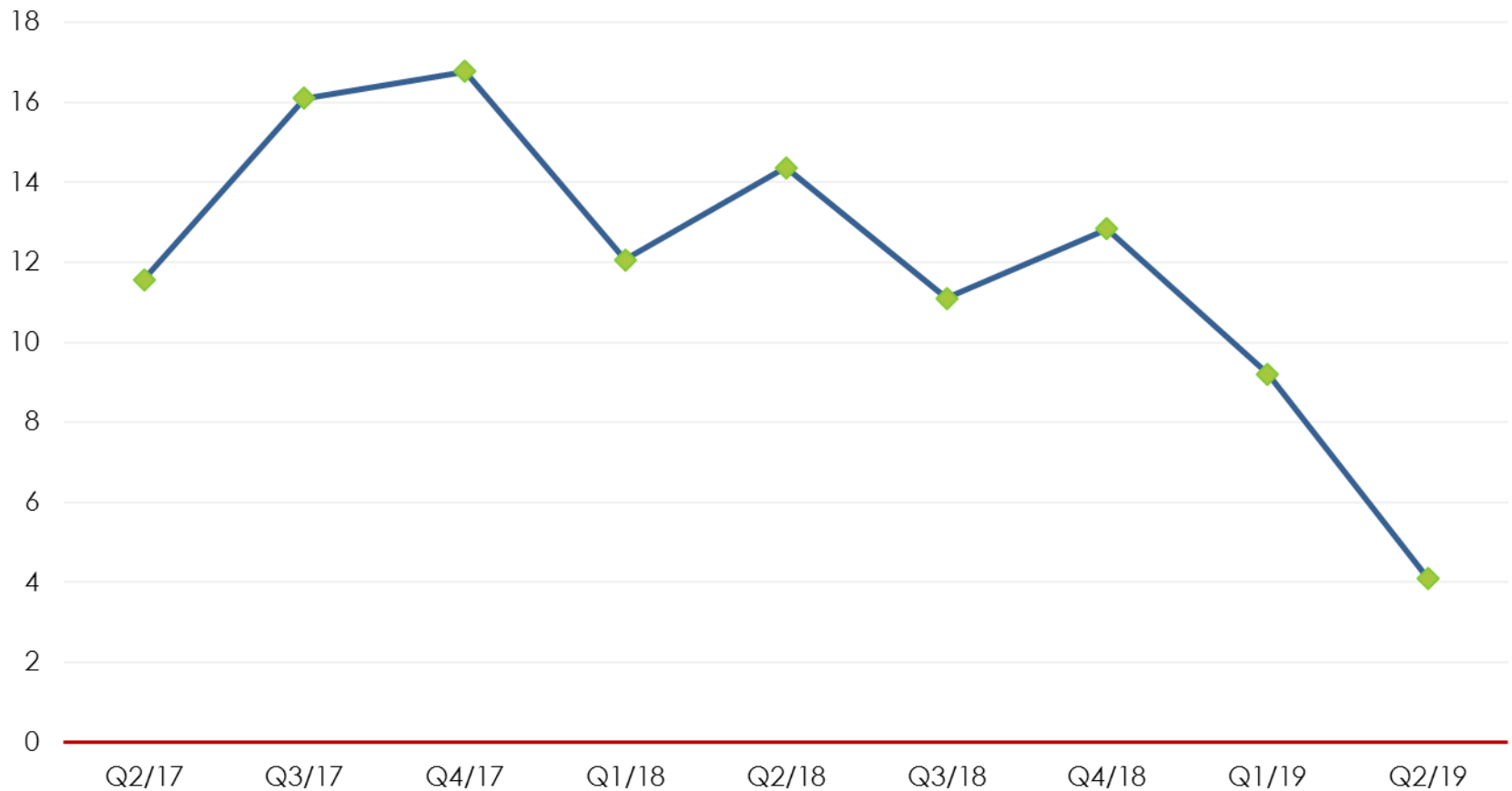


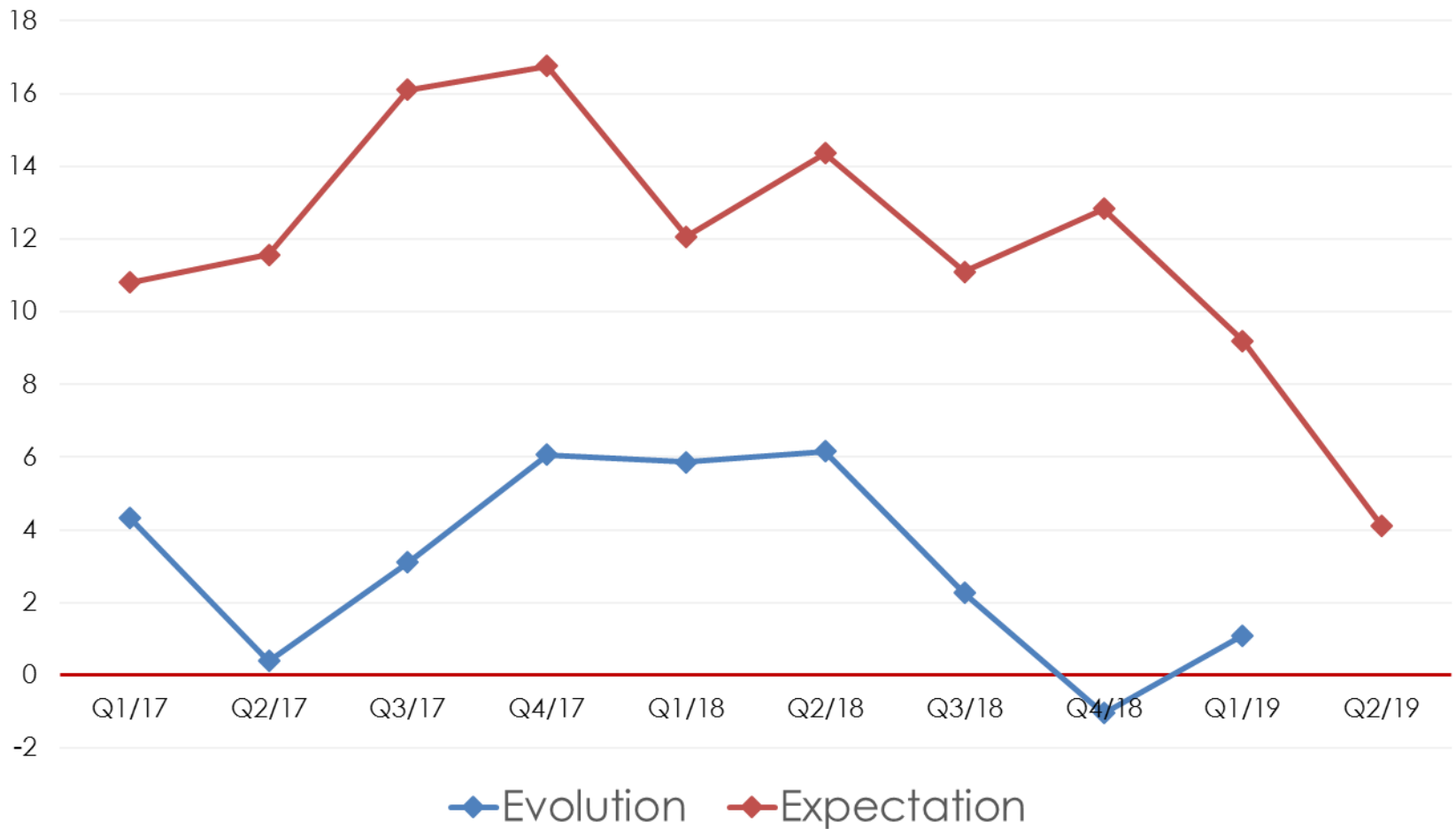


How has your firm's total employment changed over the past 3 months?



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

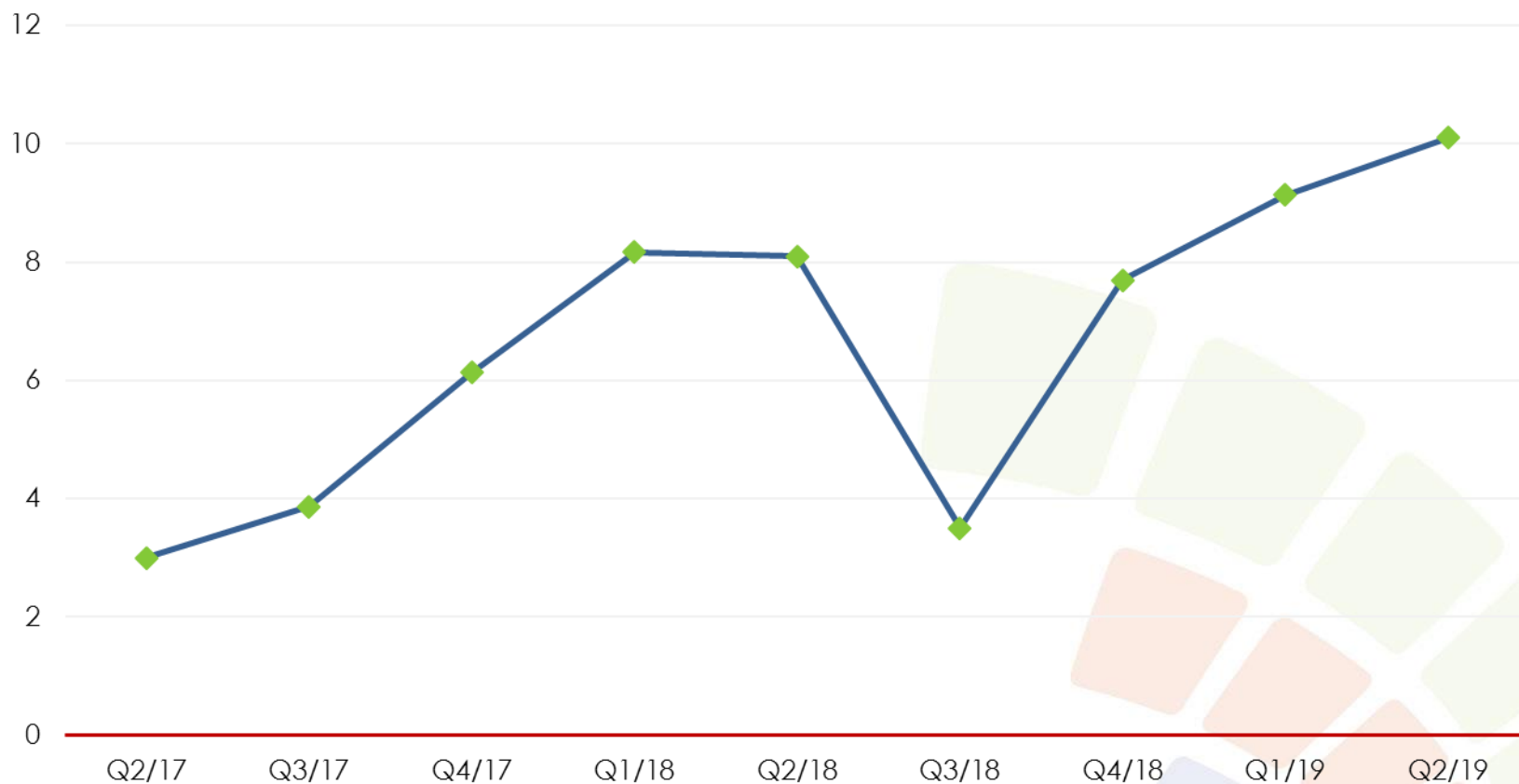






# Expectation of selling prices over the next 3 months

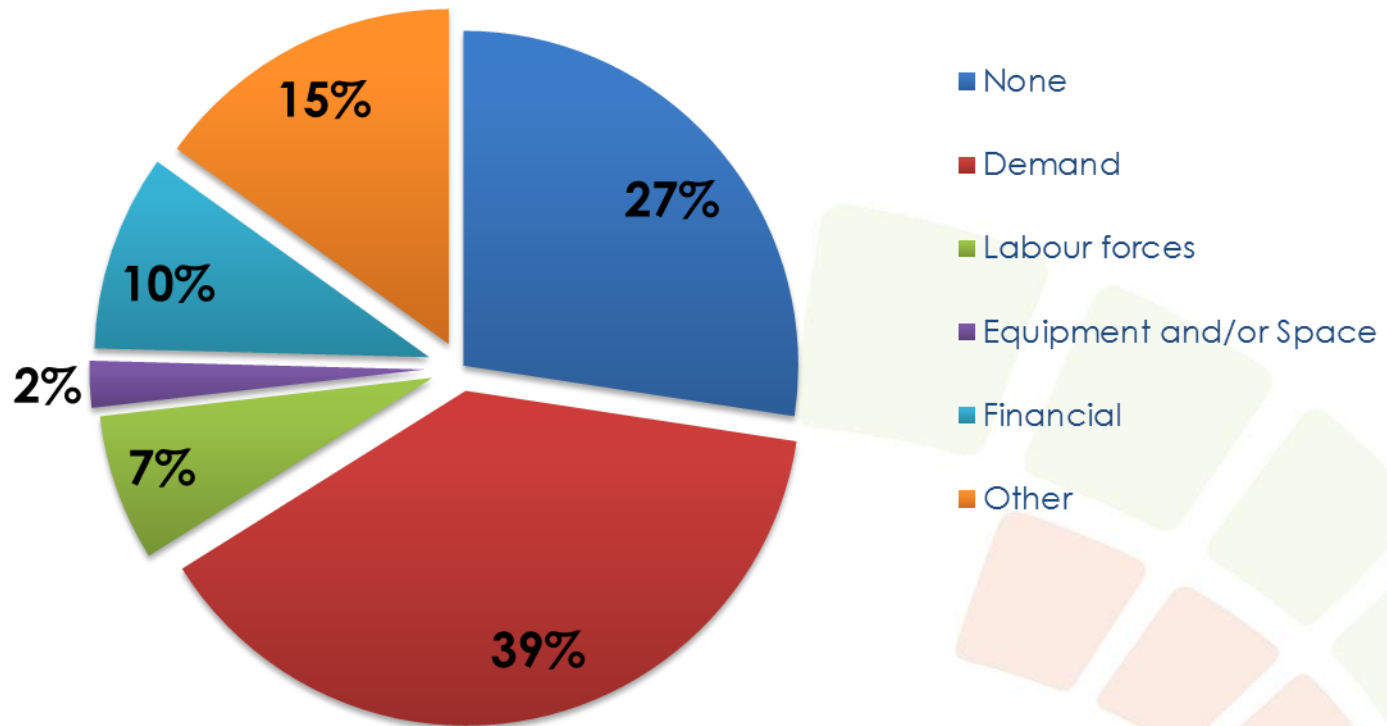
How do you expect the prices you charge to change over the next 3 months?





What main factors are currently limiting your business?

Factors limiting the business - Q2/19

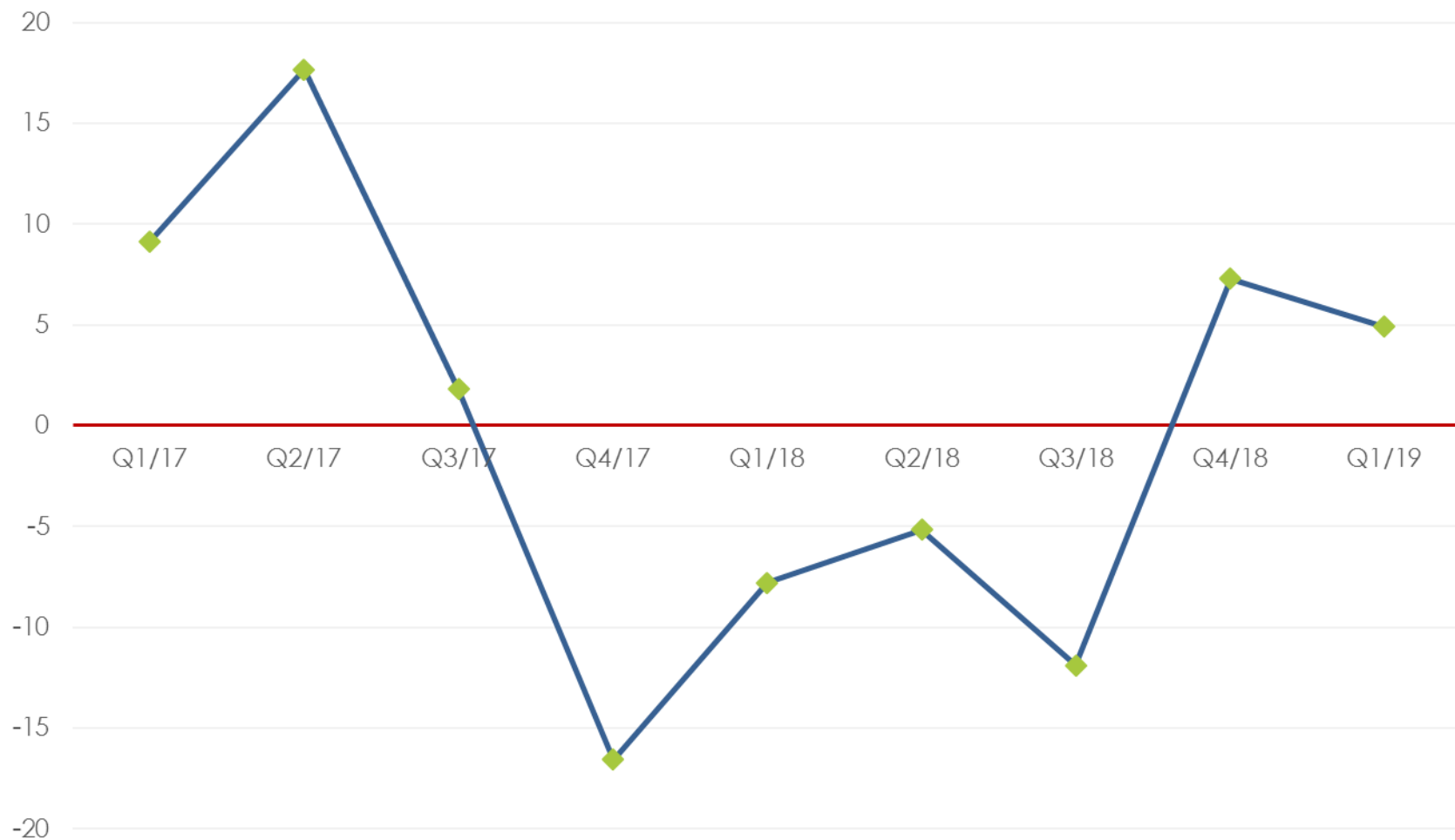


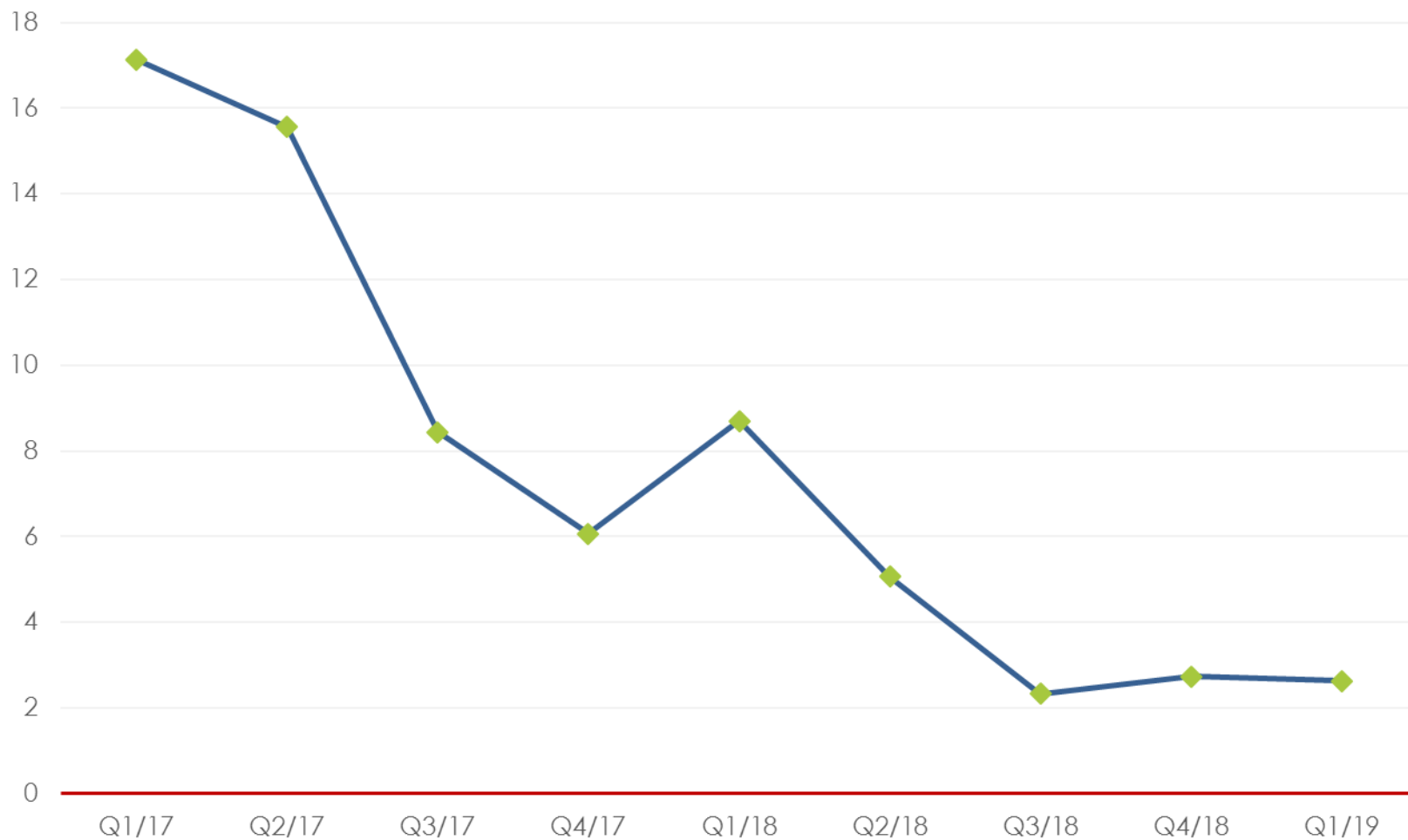


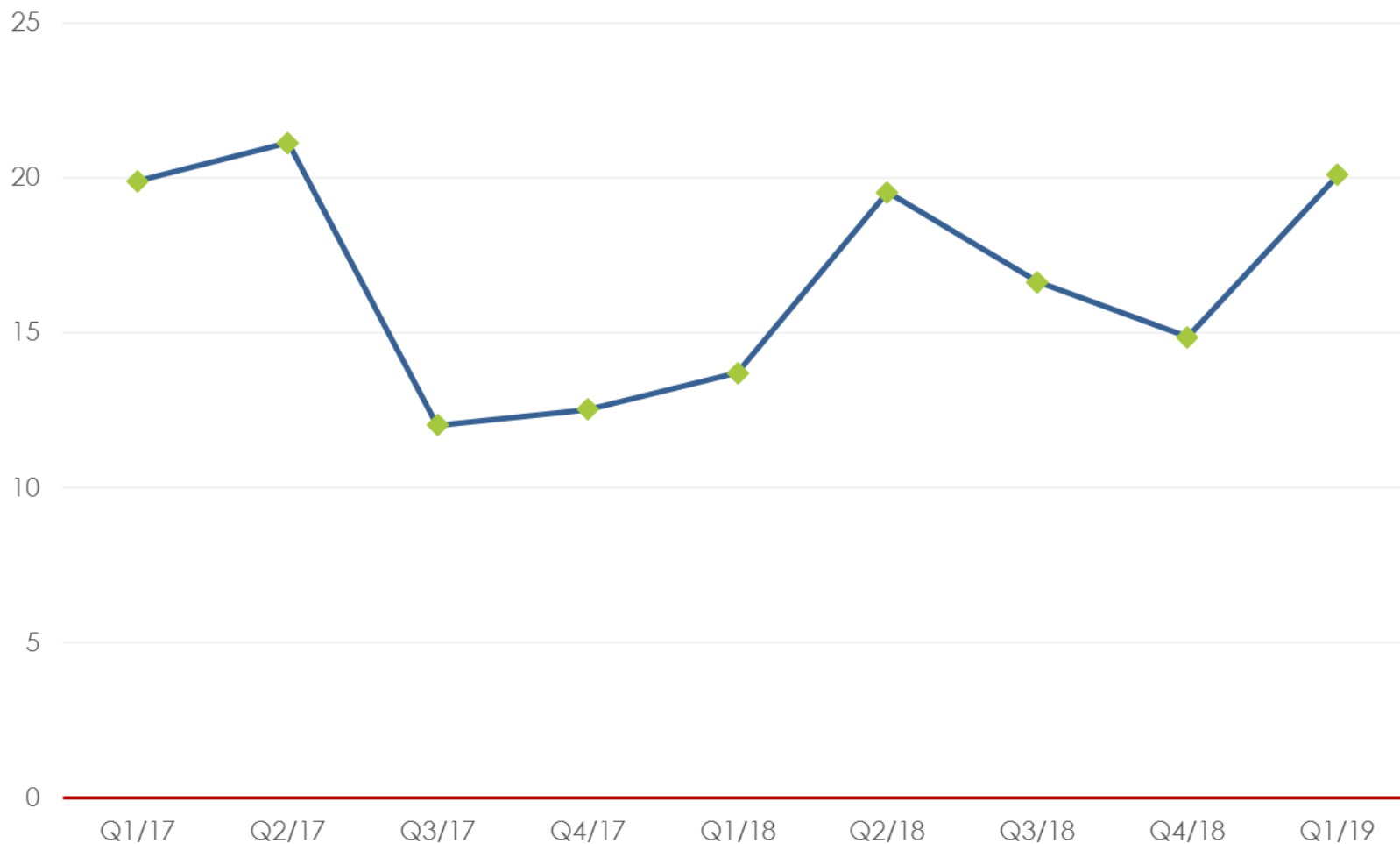
# Country-specific graphs

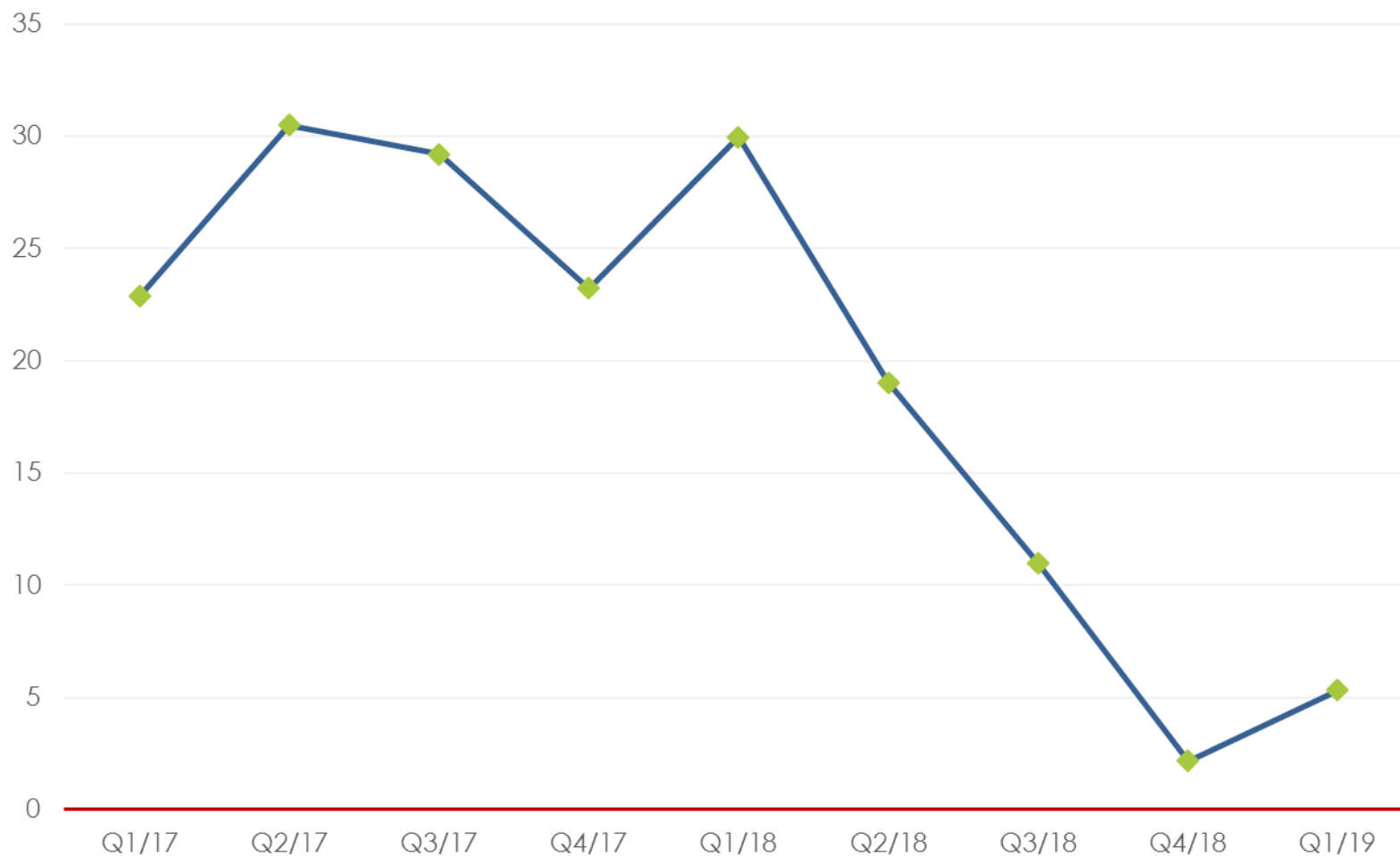
General confidence  
index





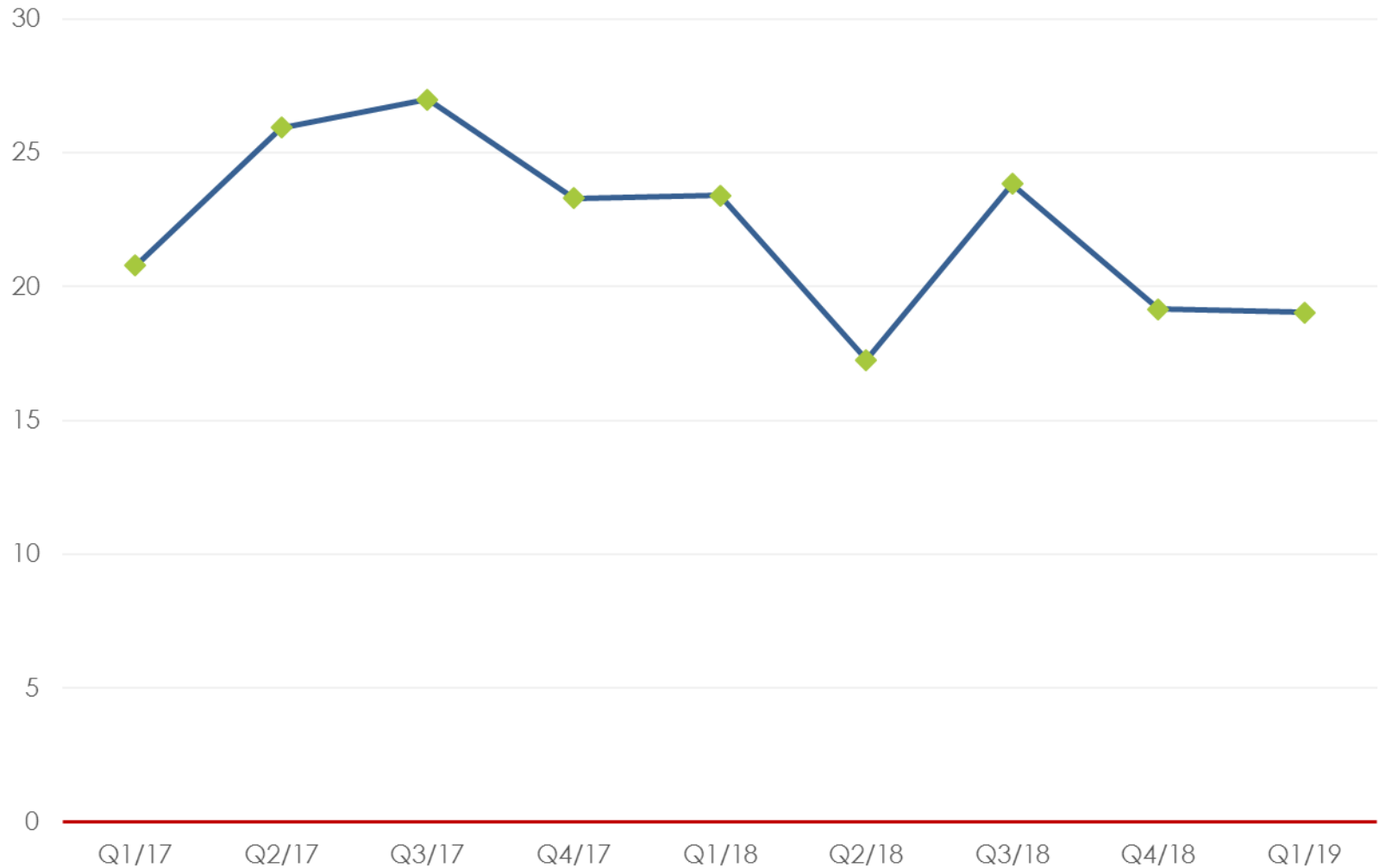


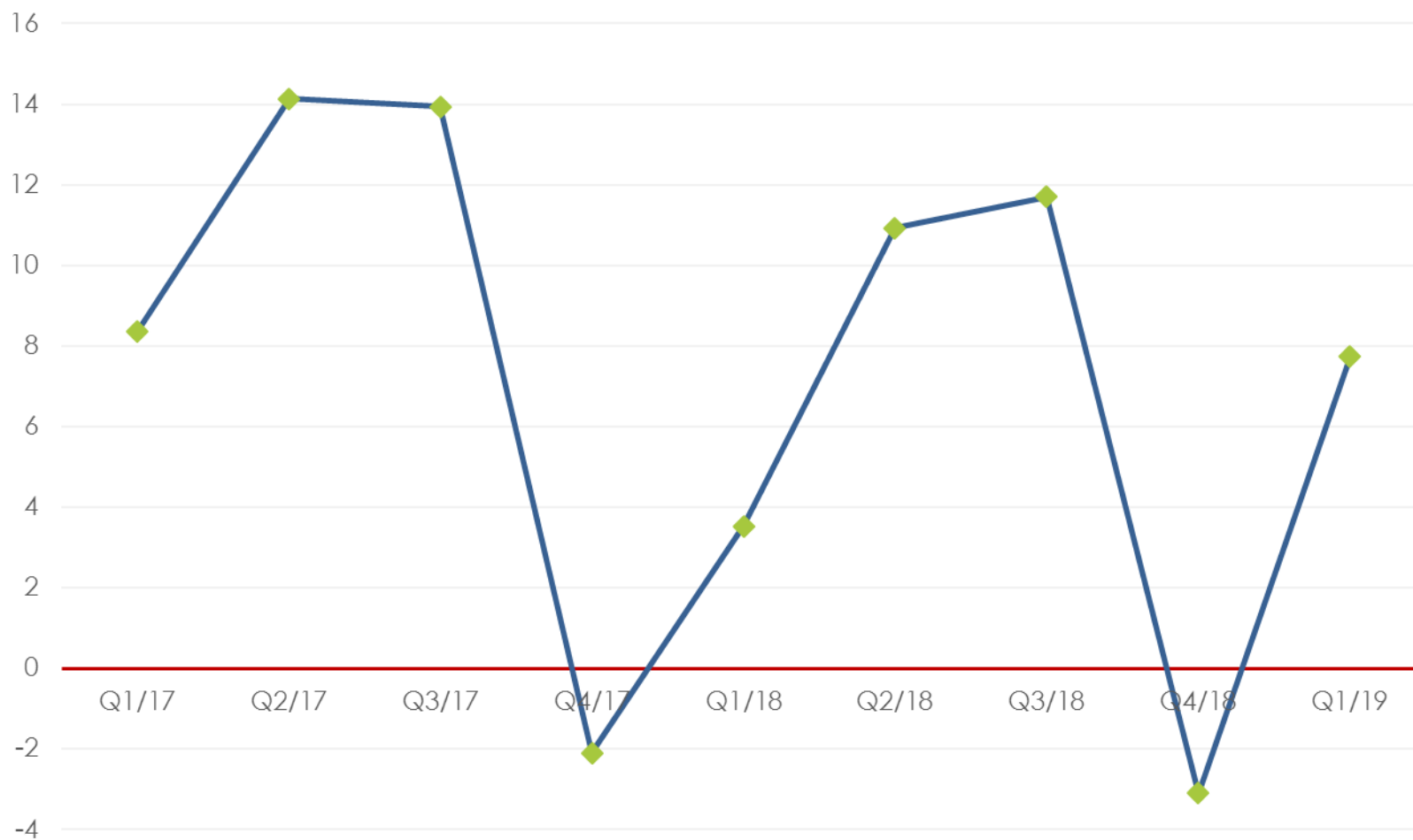




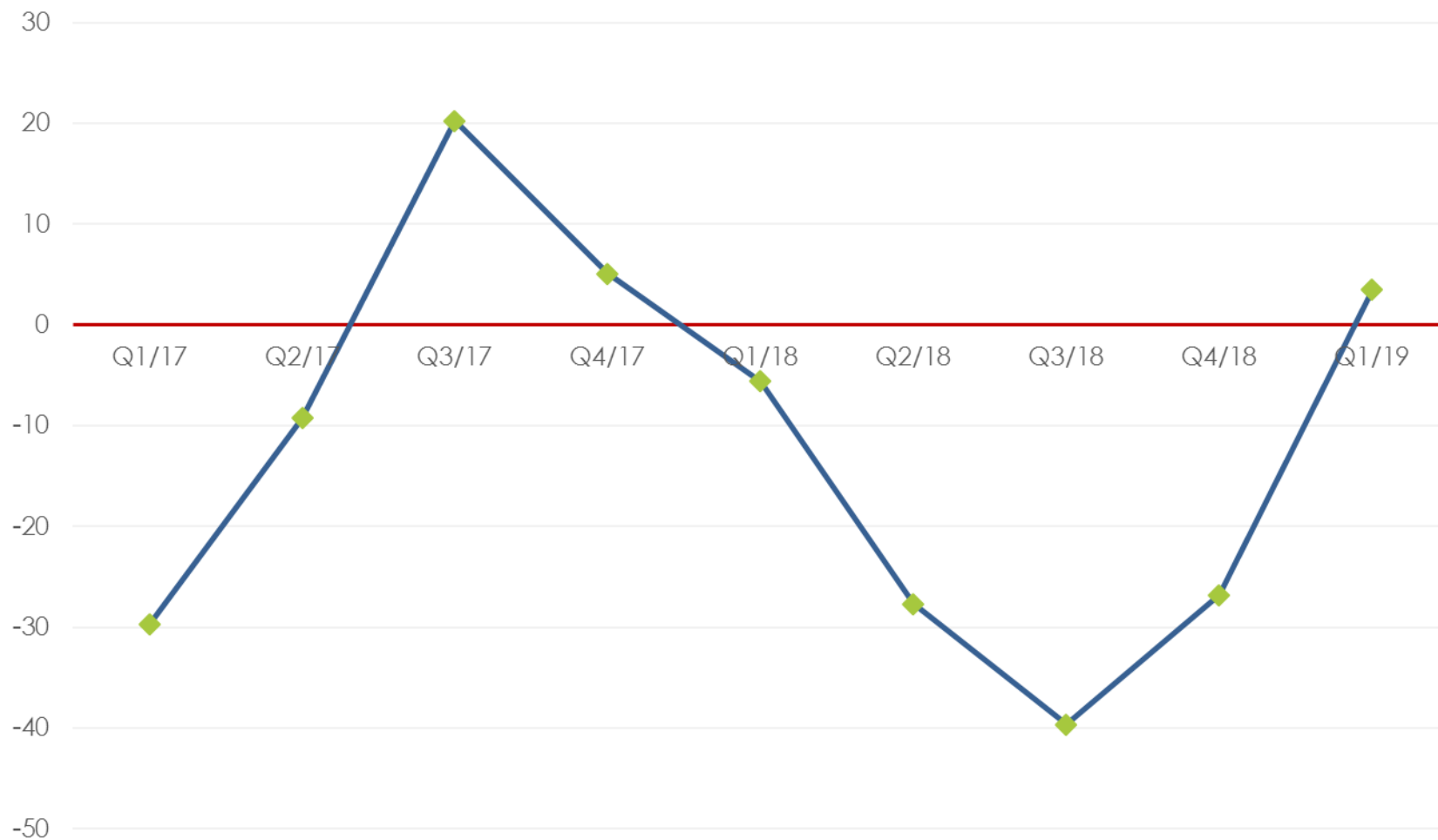


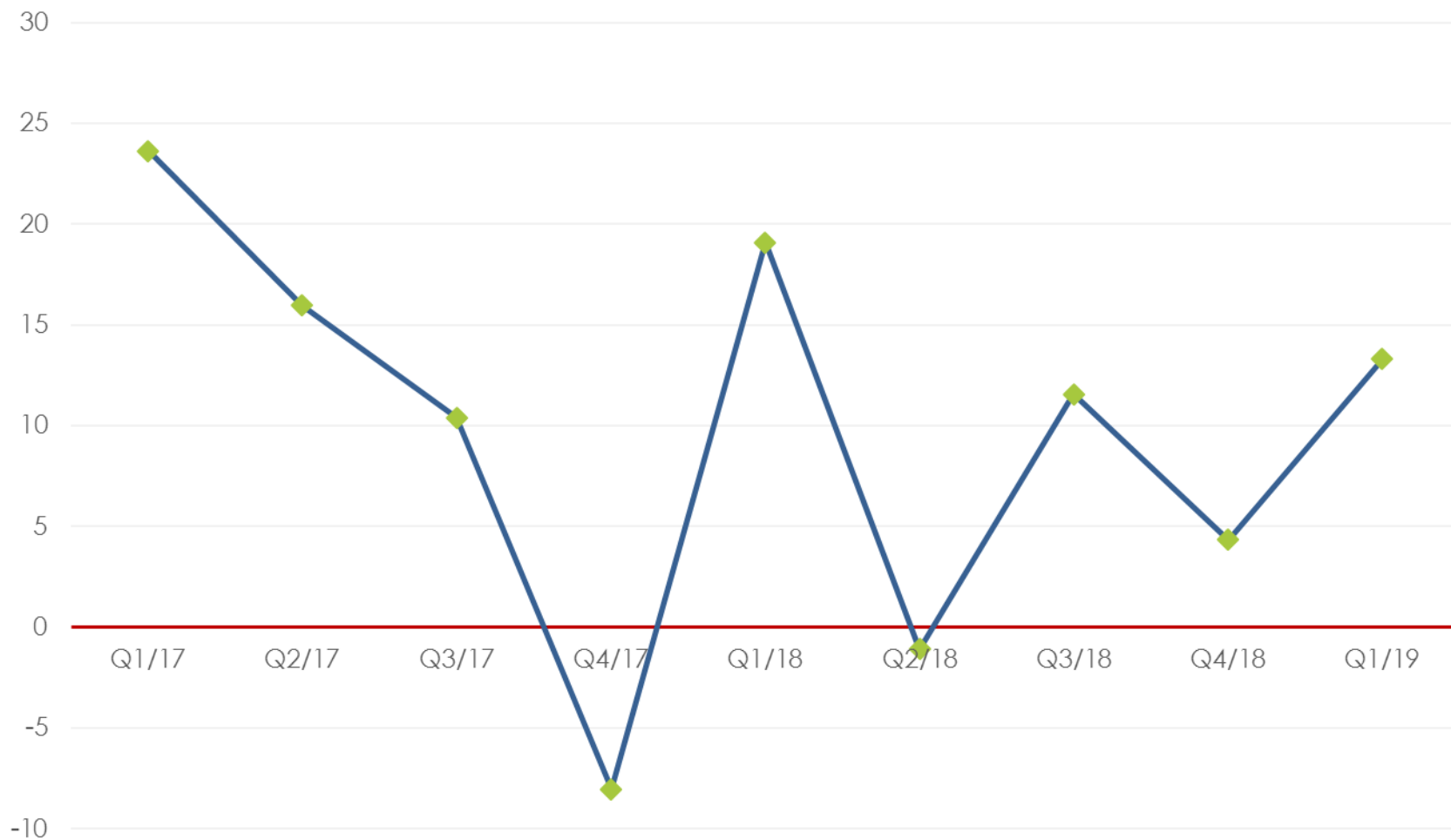
# Advertising Business Climate Index Germany

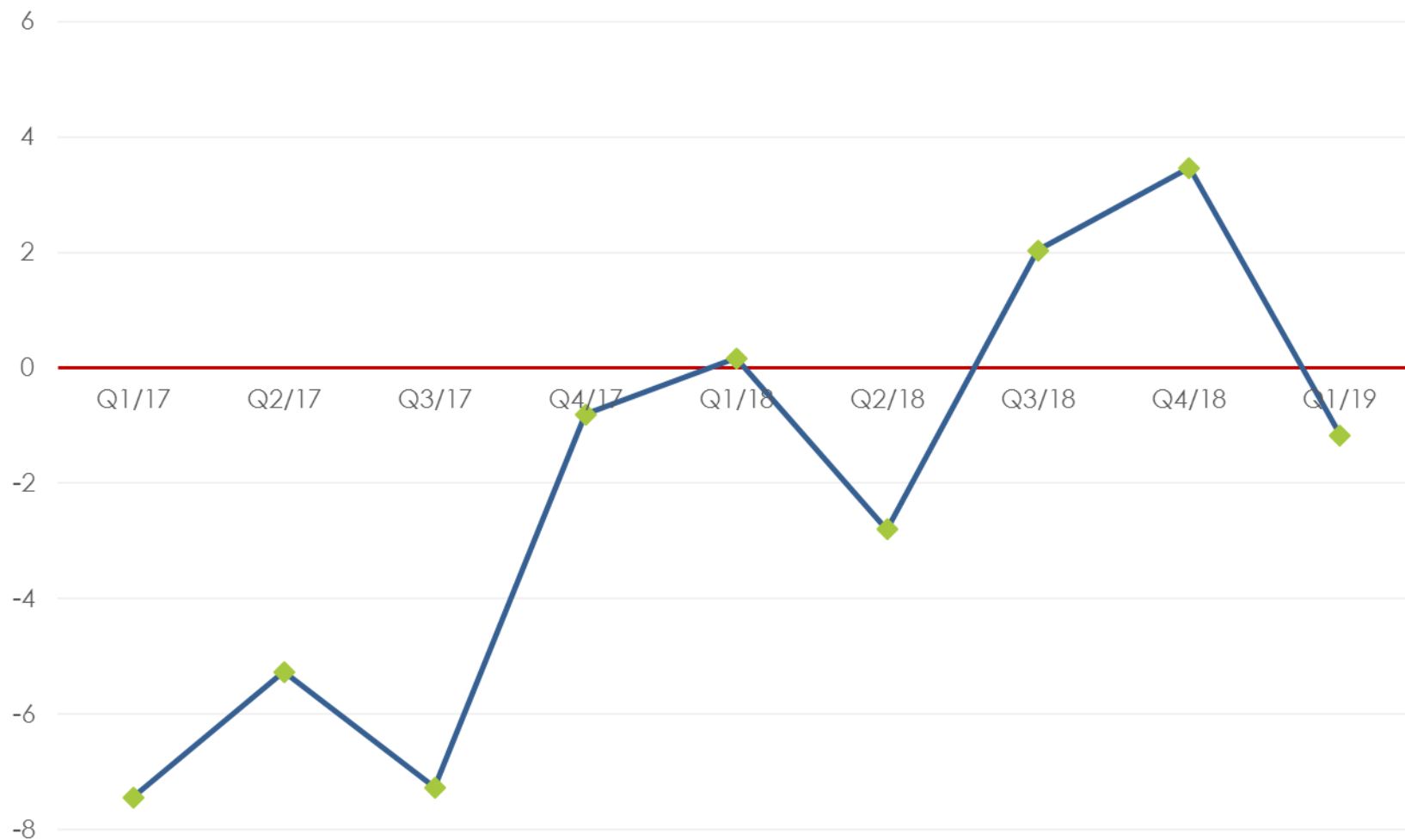


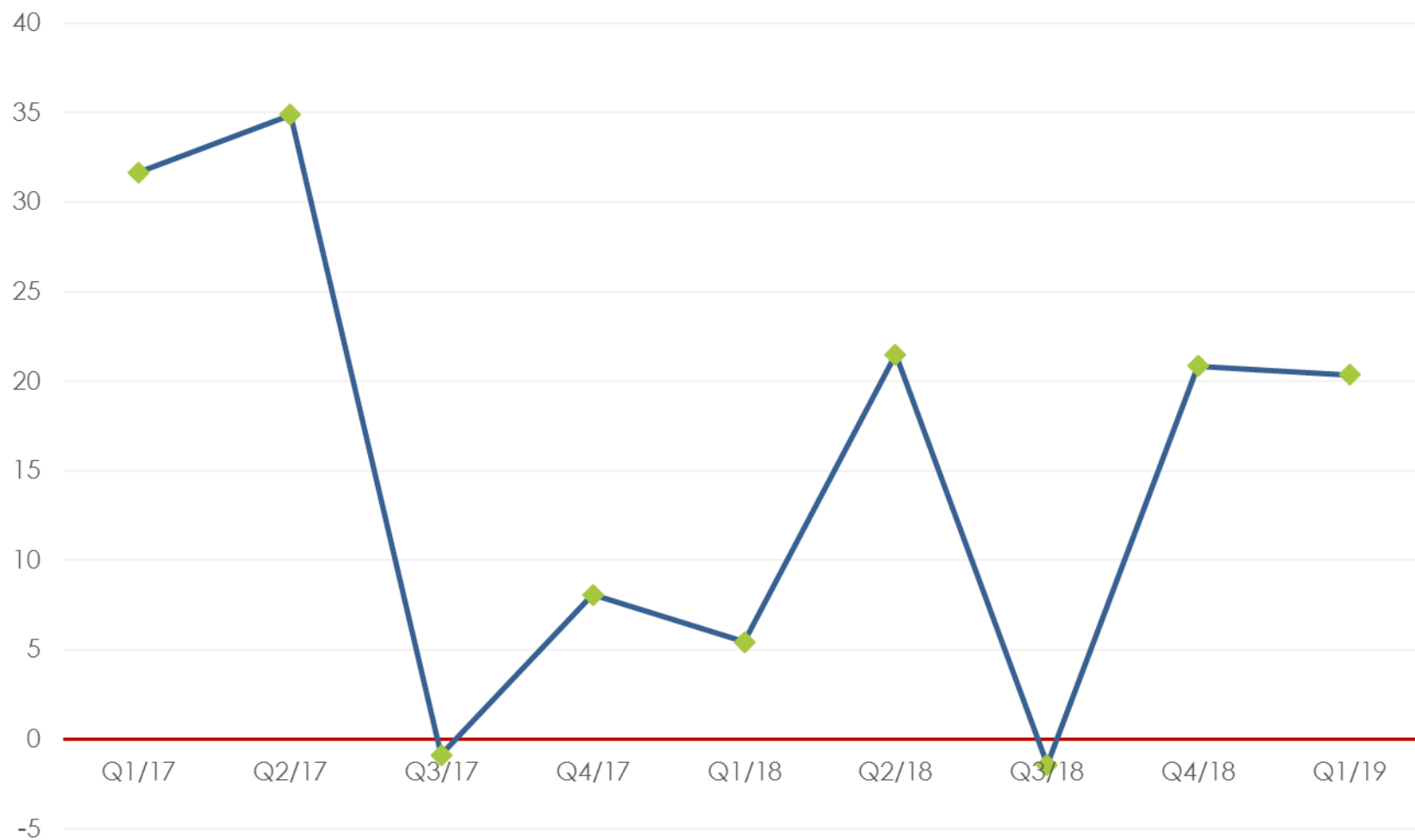


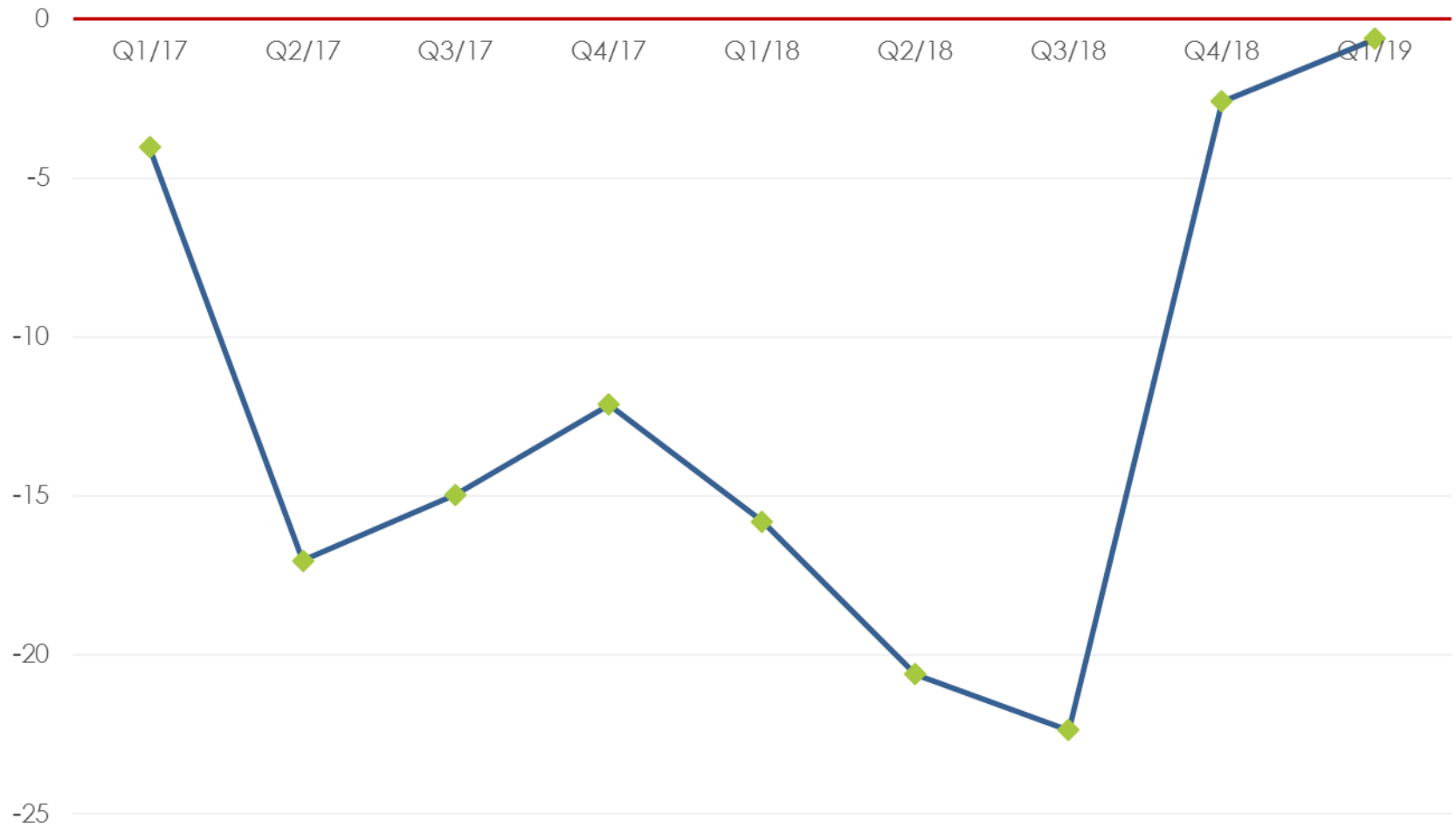


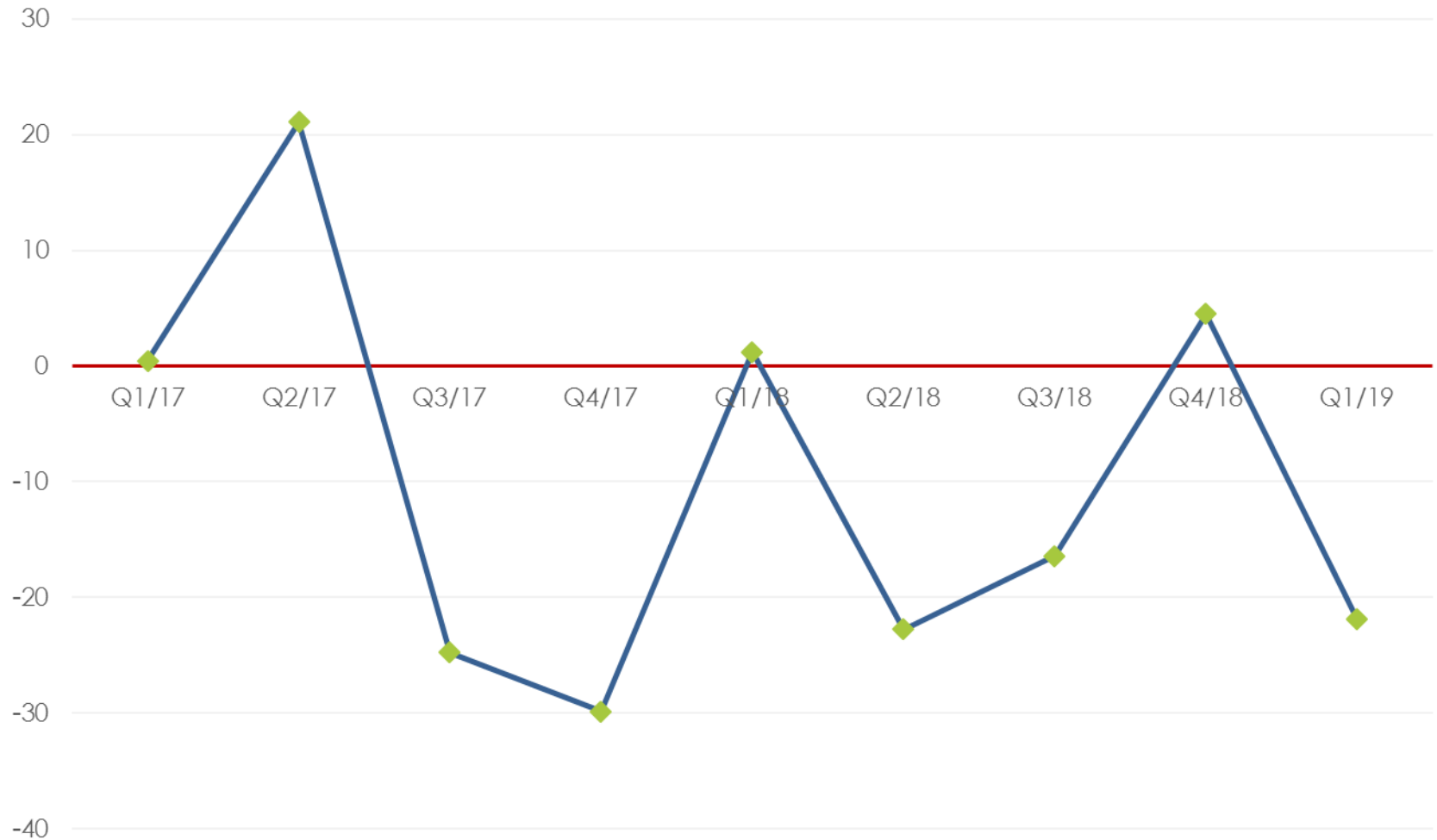


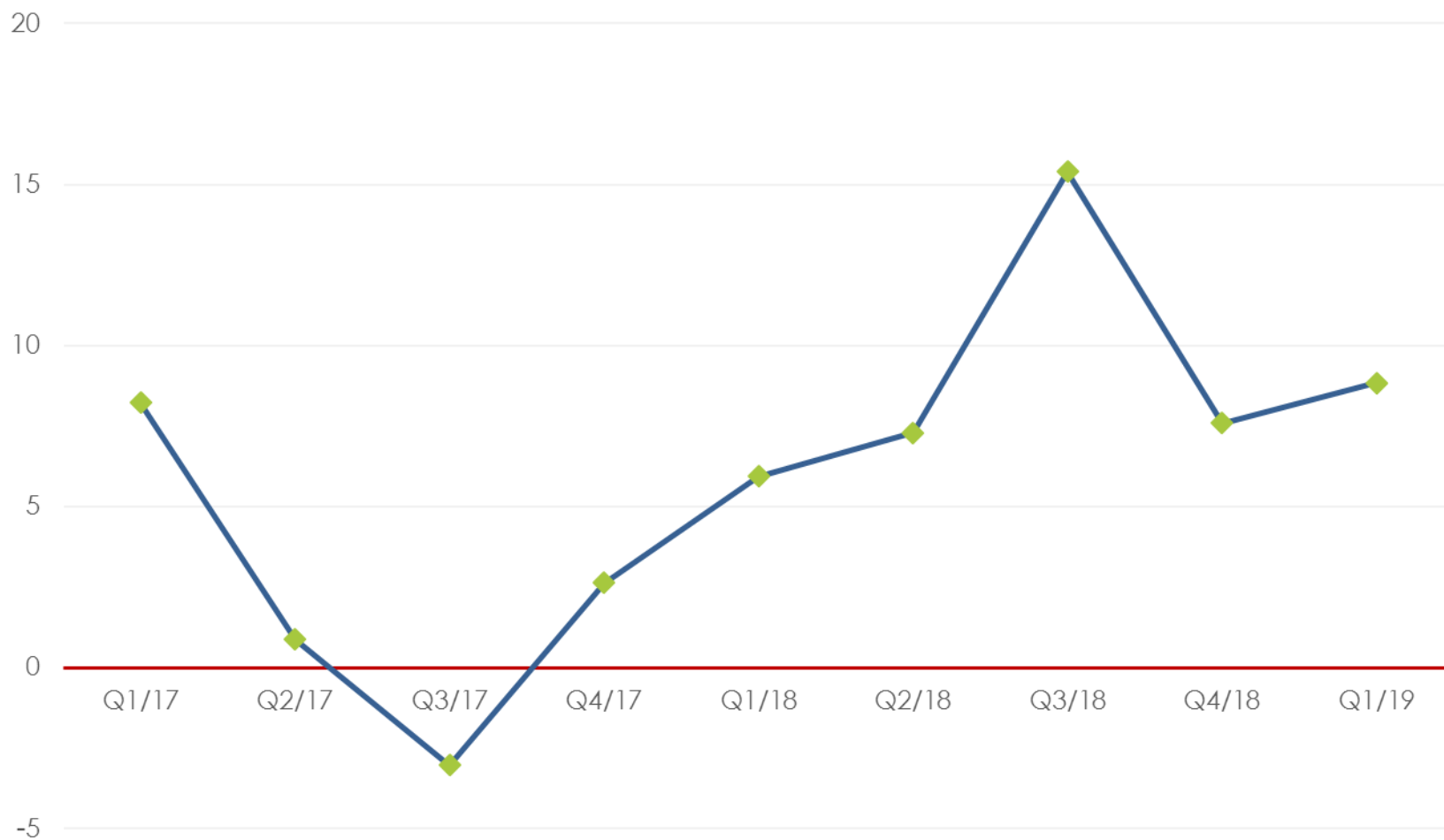


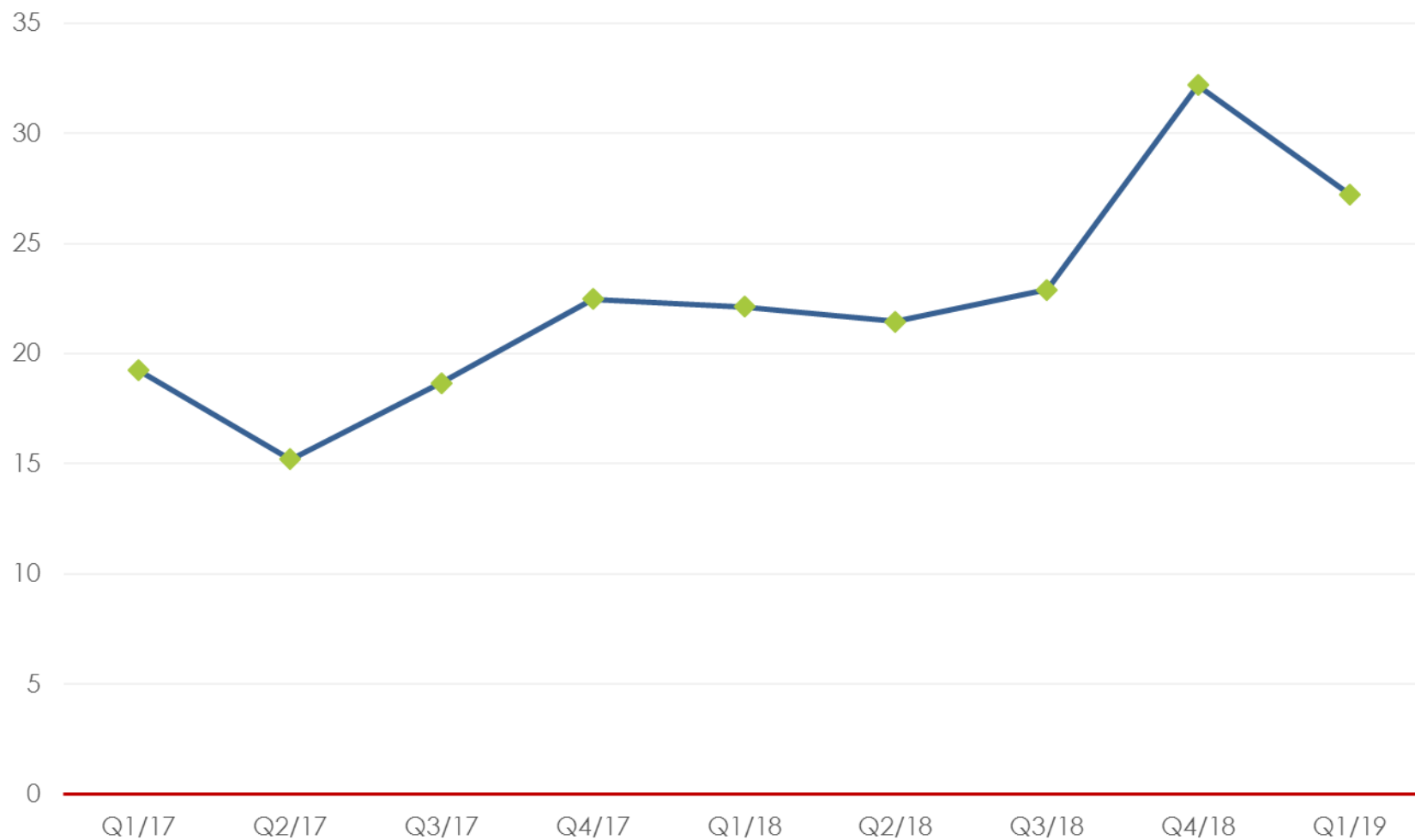




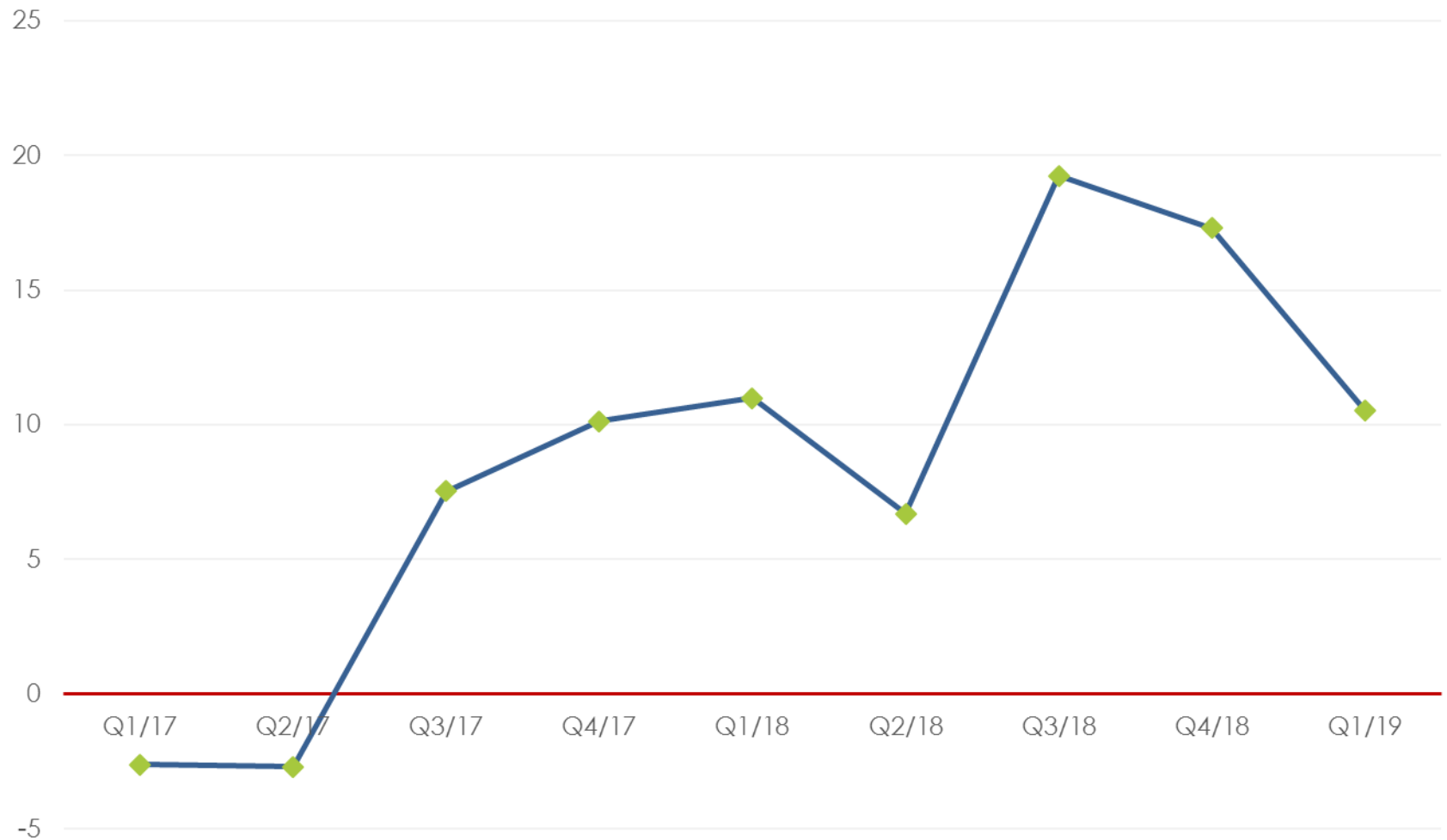


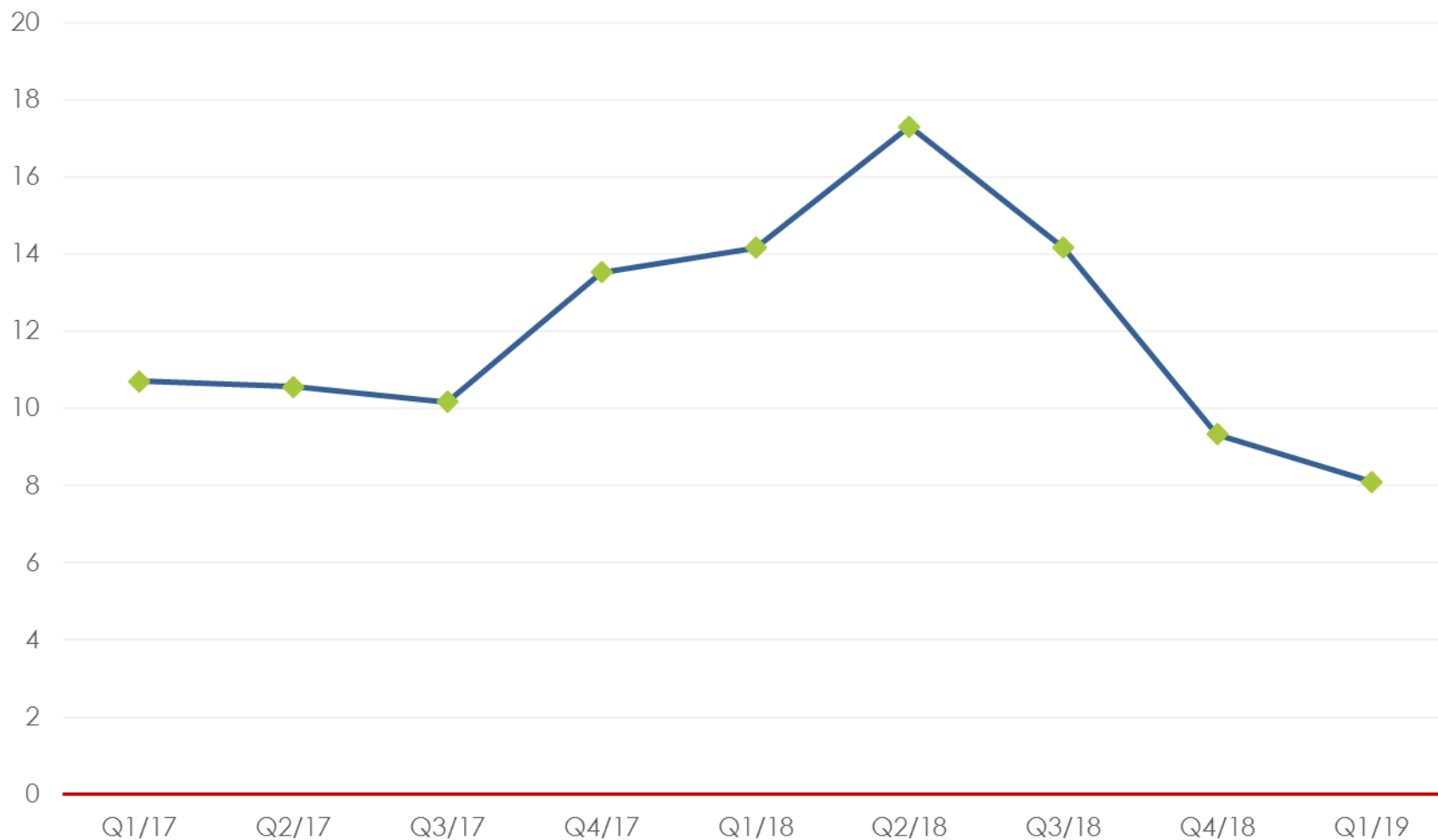


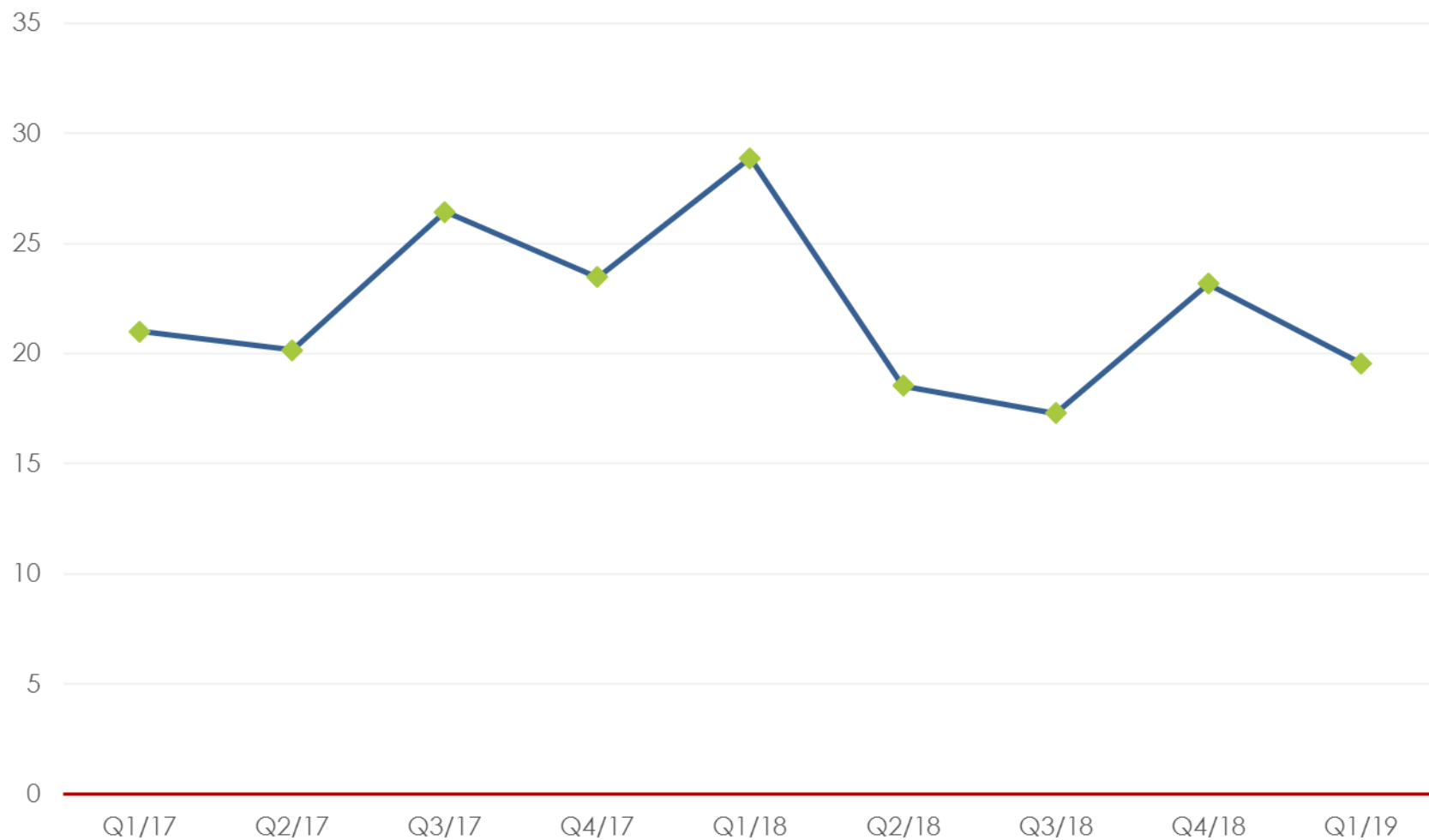


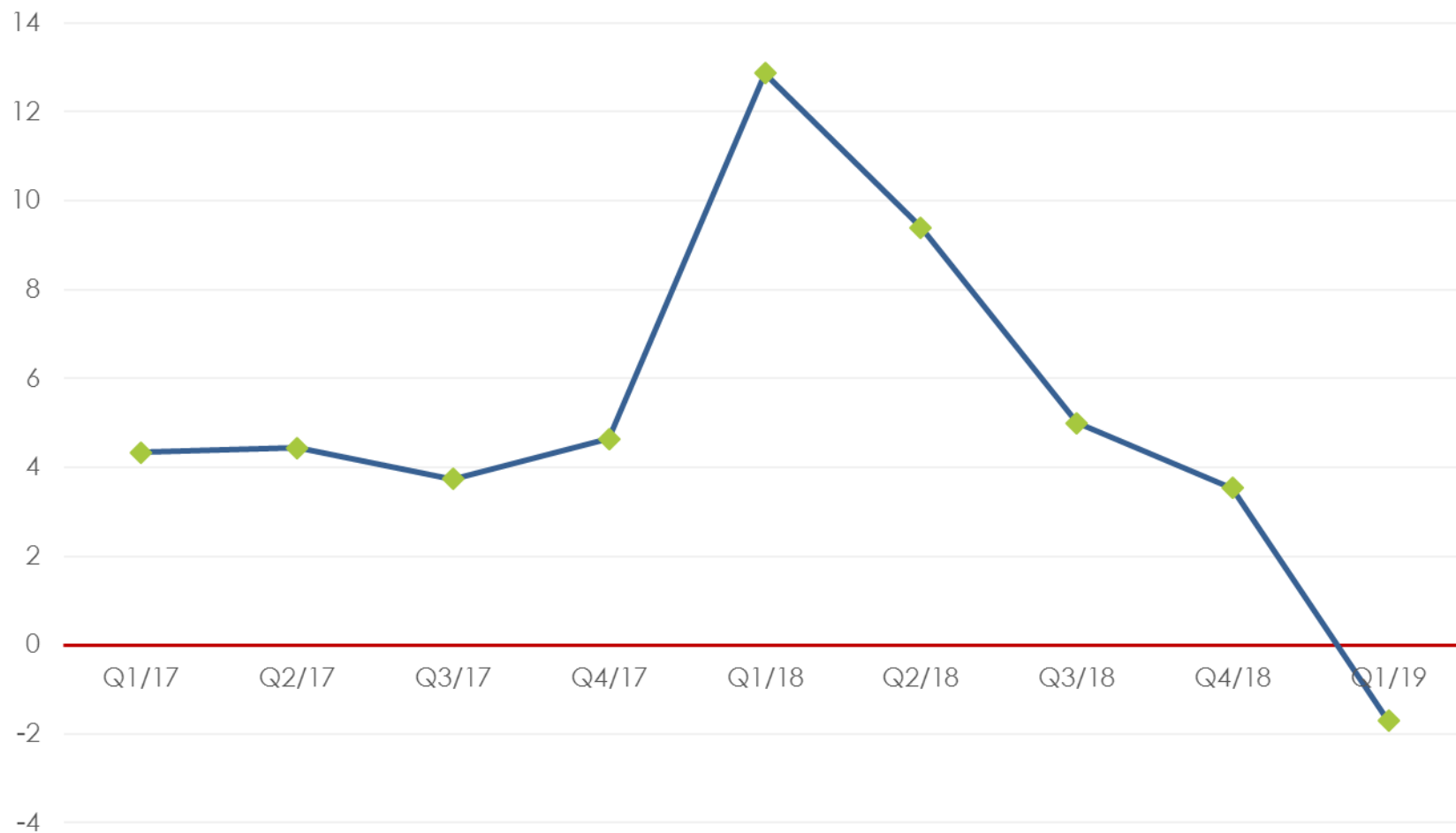


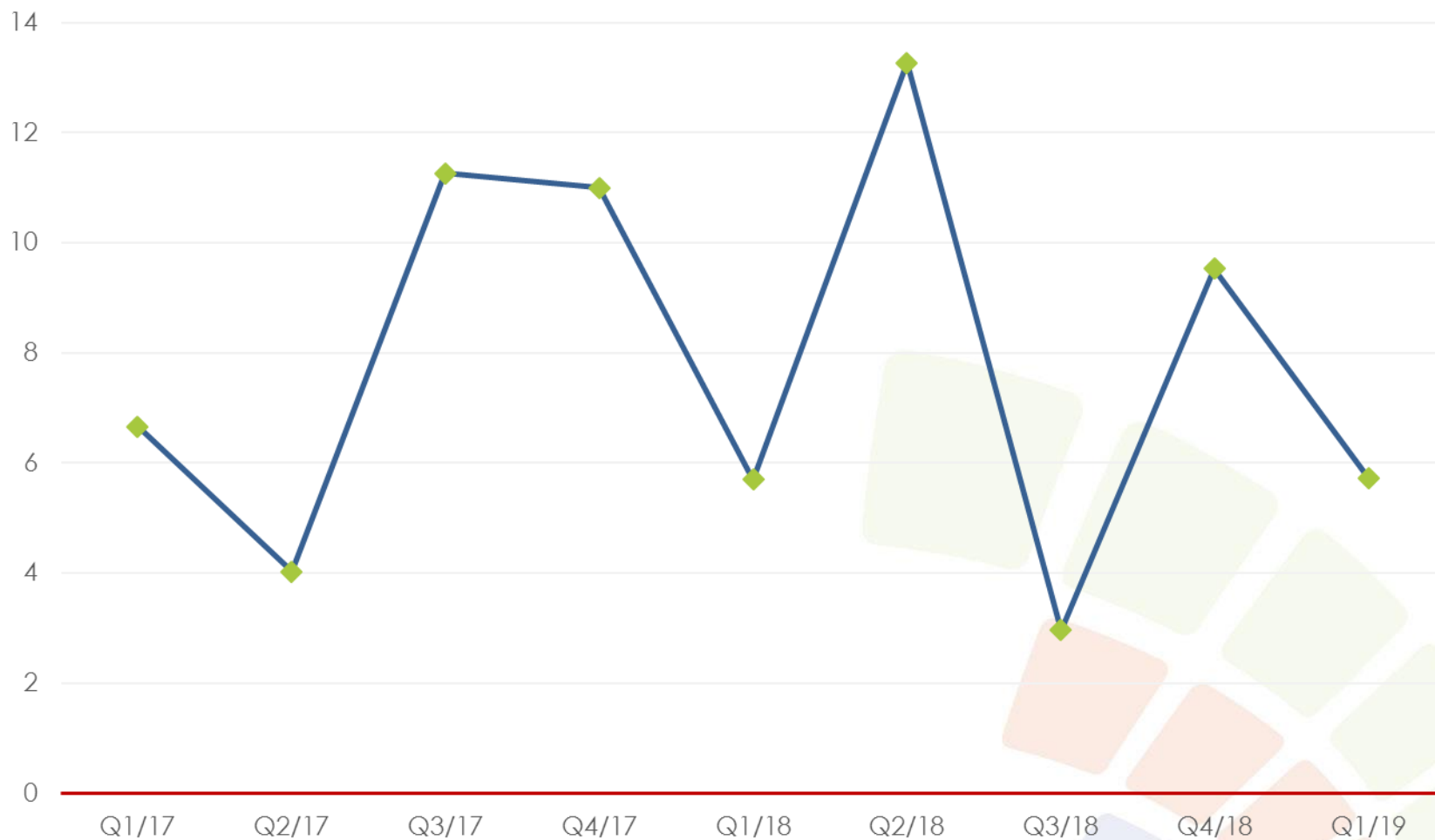


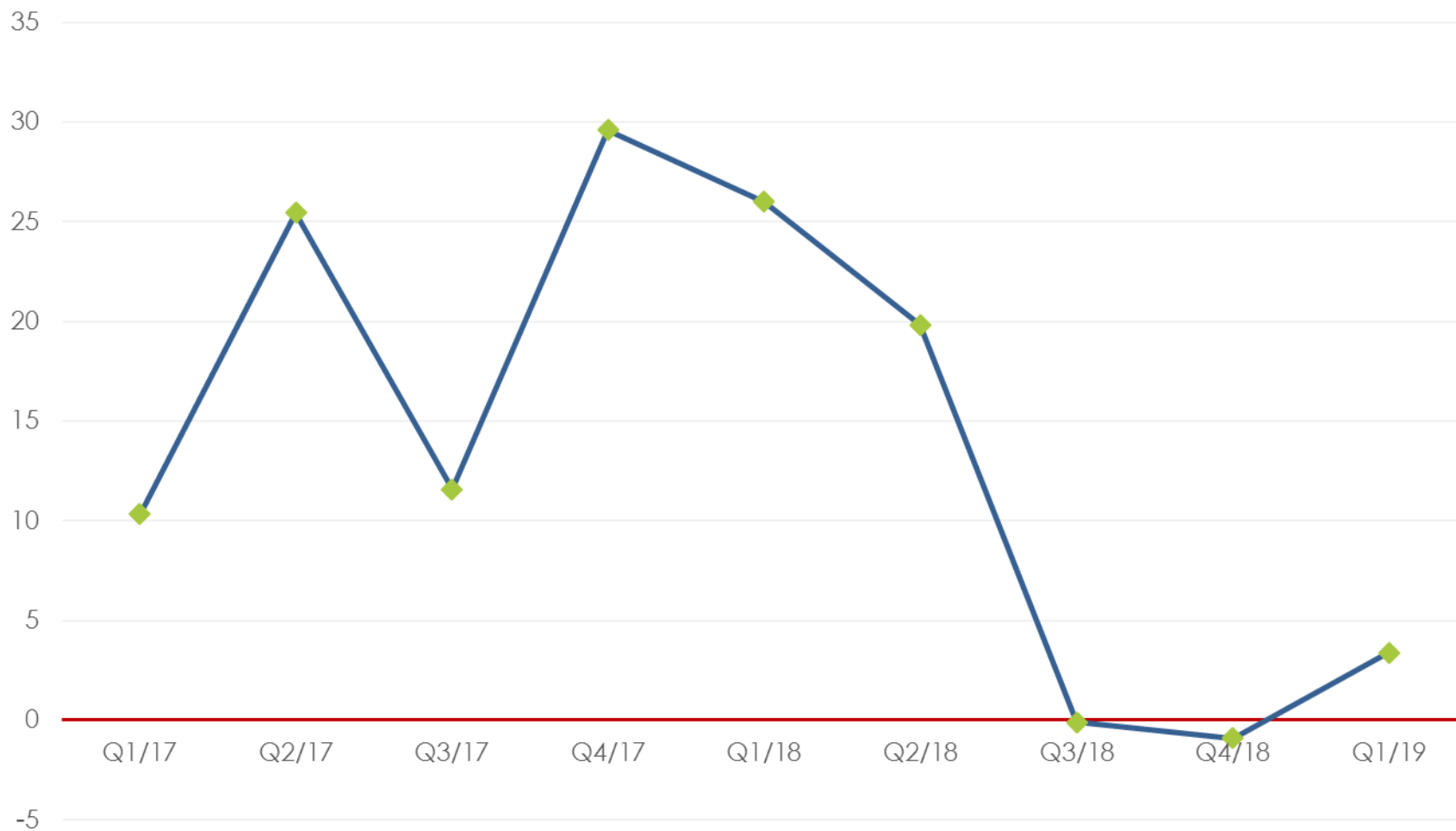


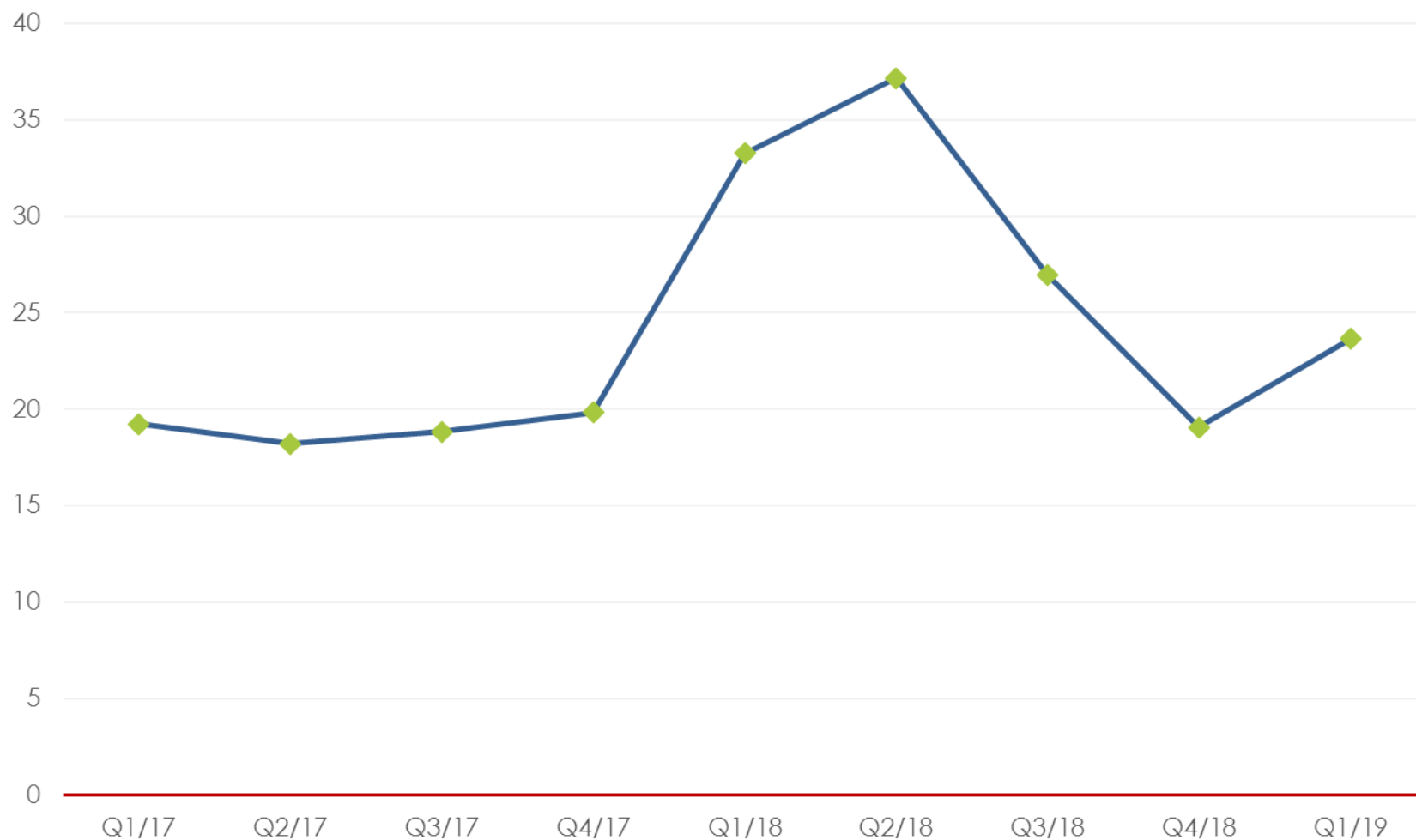


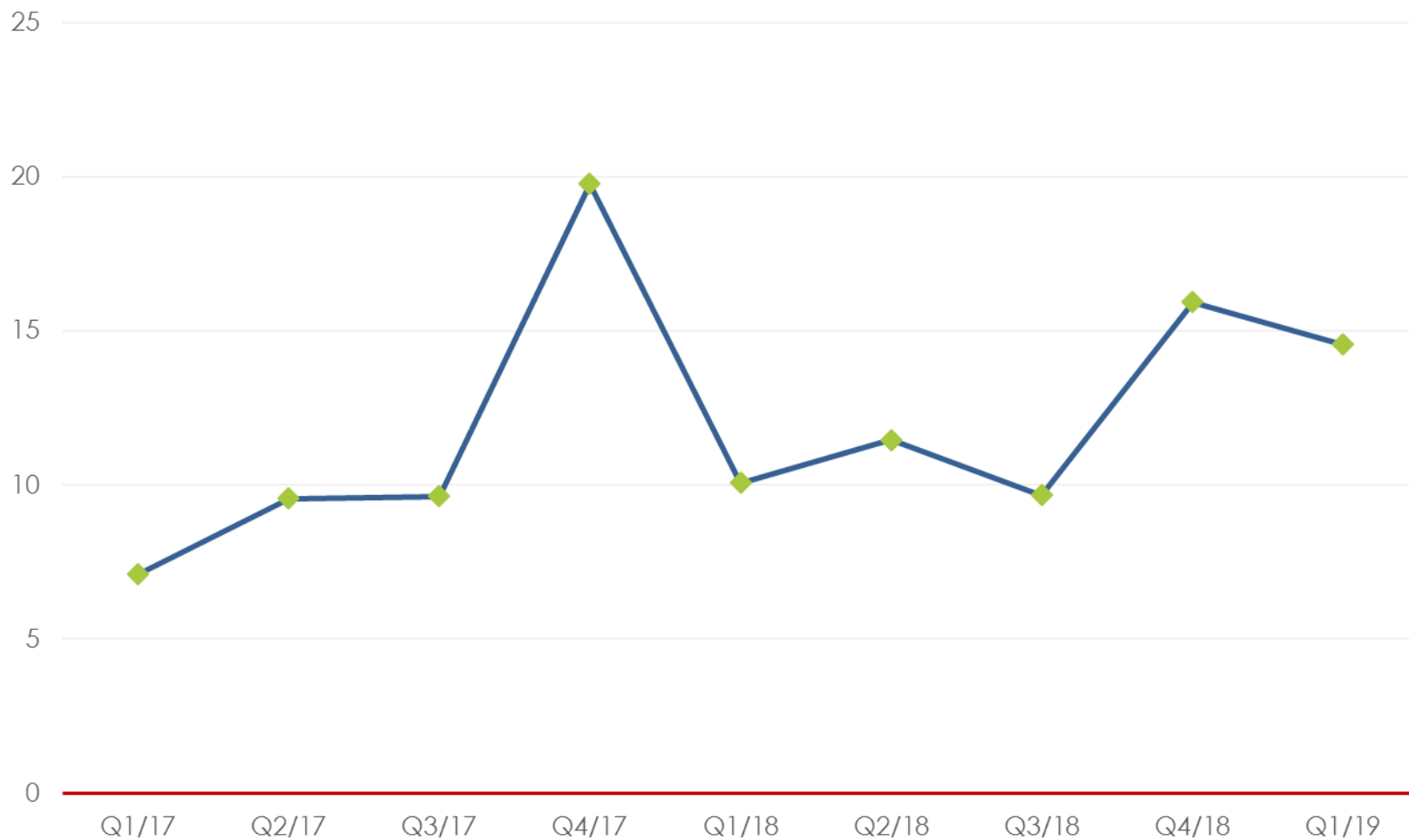






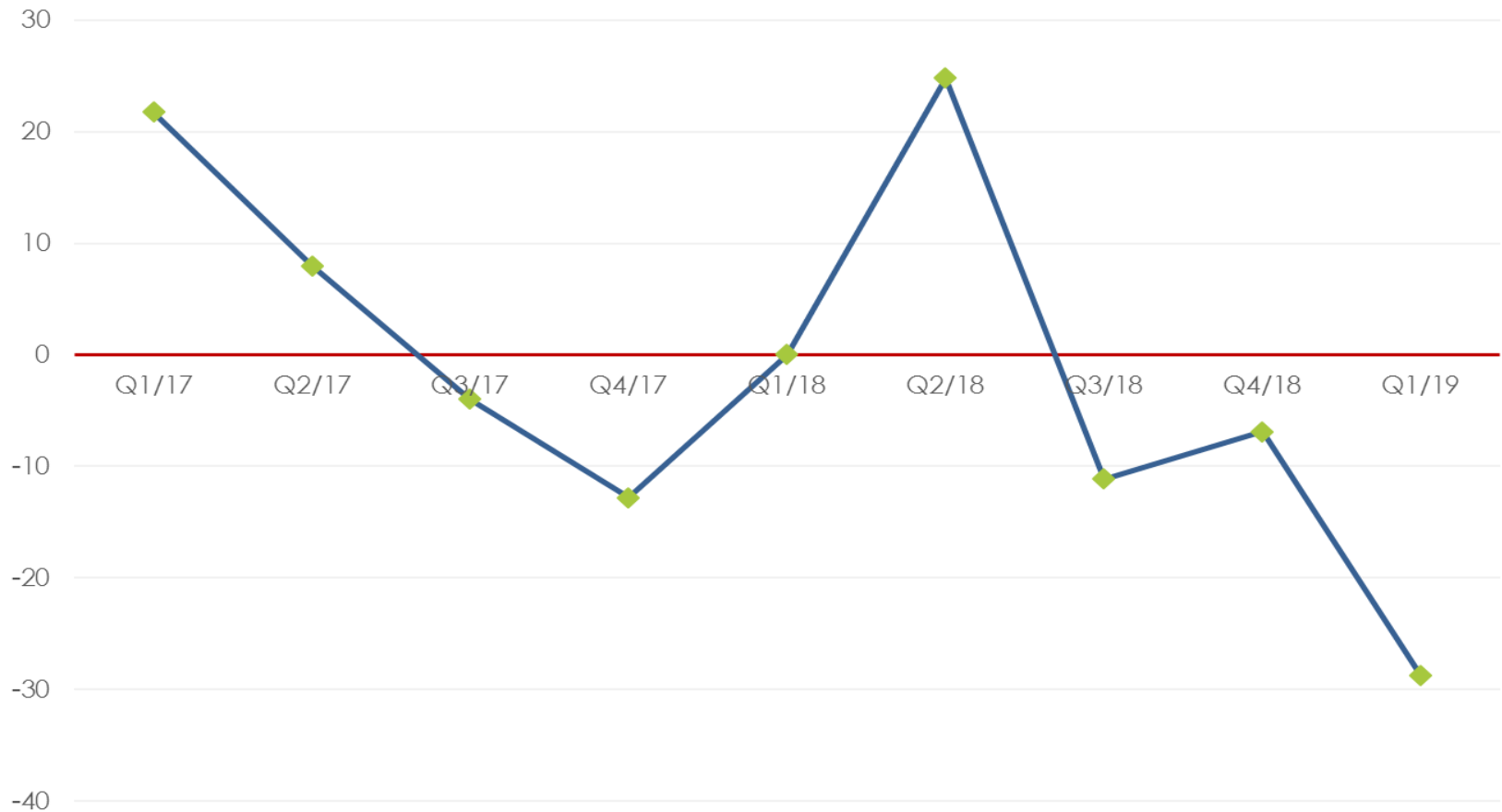




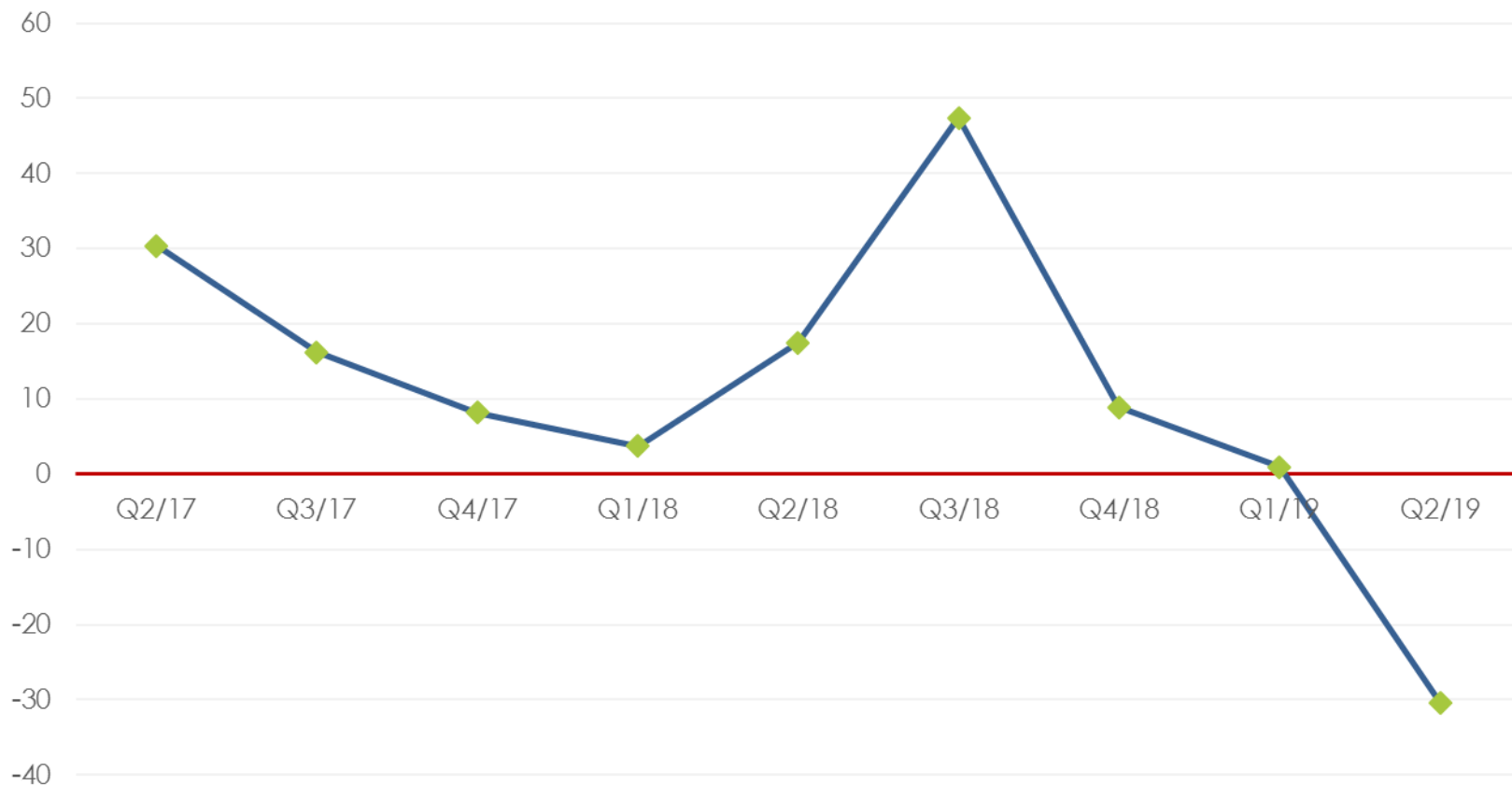




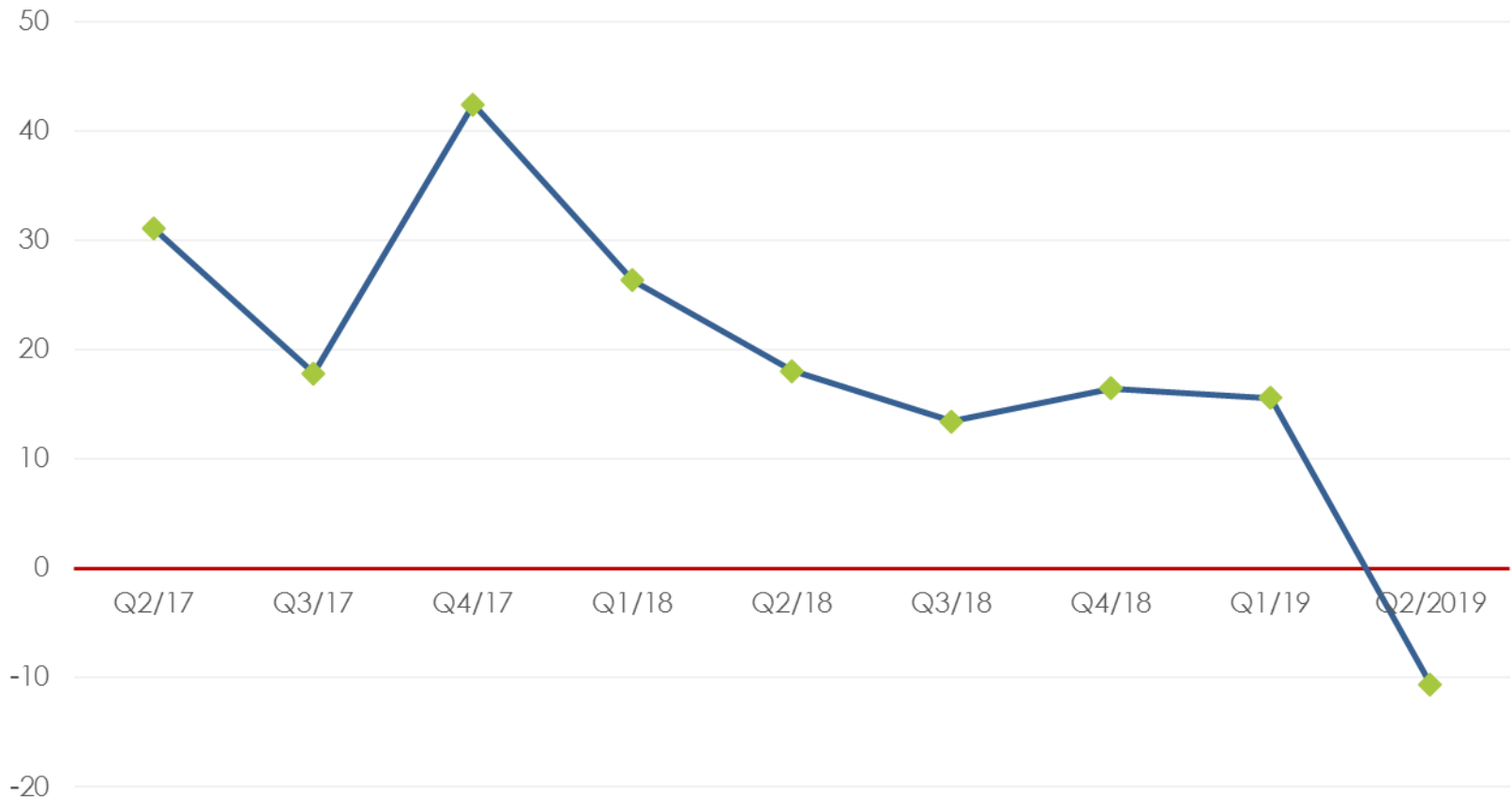
General confidence index



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



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





# Advertising Business Climate Index

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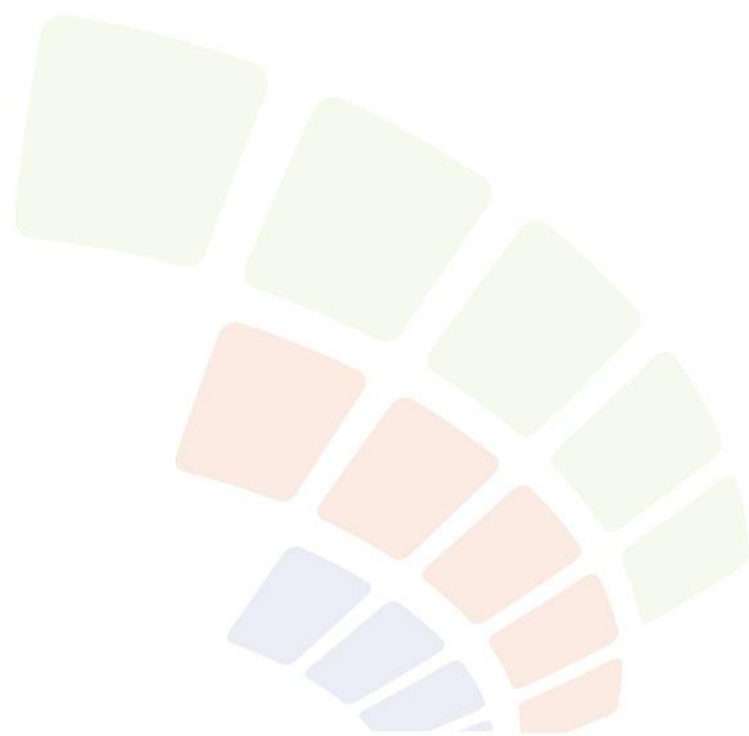
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