

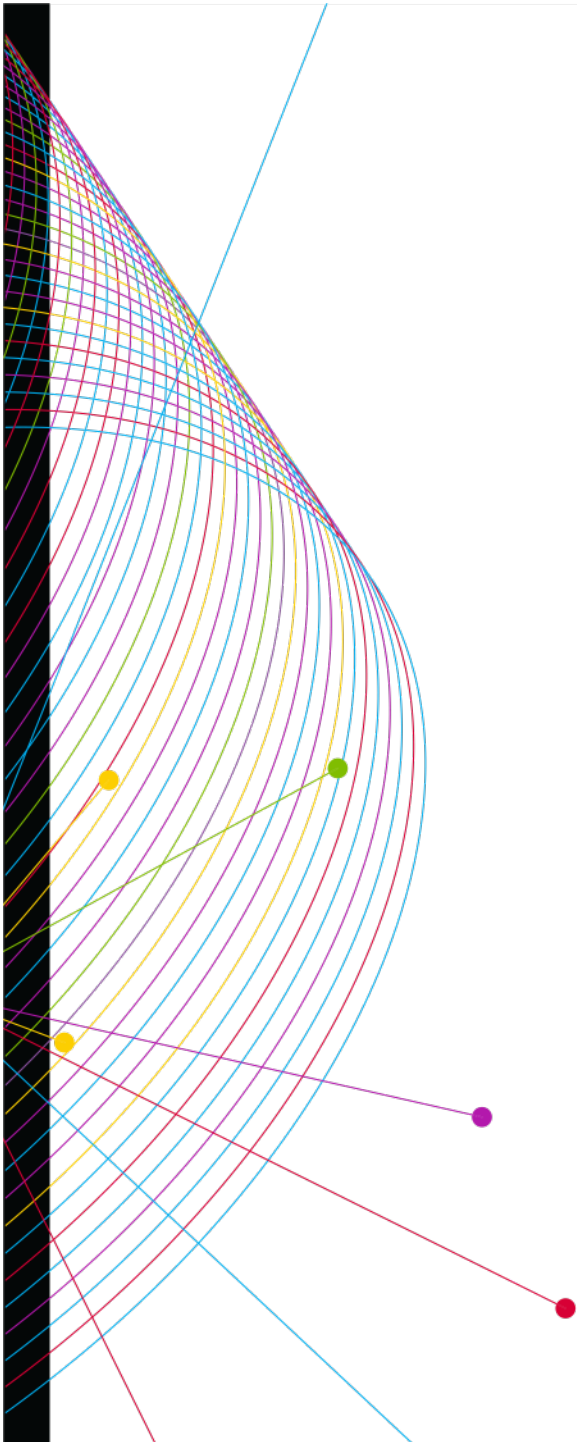
An abstract graphic on a black background. It features several thin, curved lines in various colors (blue, green, yellow, red, purple) that sweep across the frame from the top right towards the bottom left. There are five small, solid-colored dots (blue, green, yellow, red, purple) scattered across the upper half of the image, some connected to the lines.

nielsen

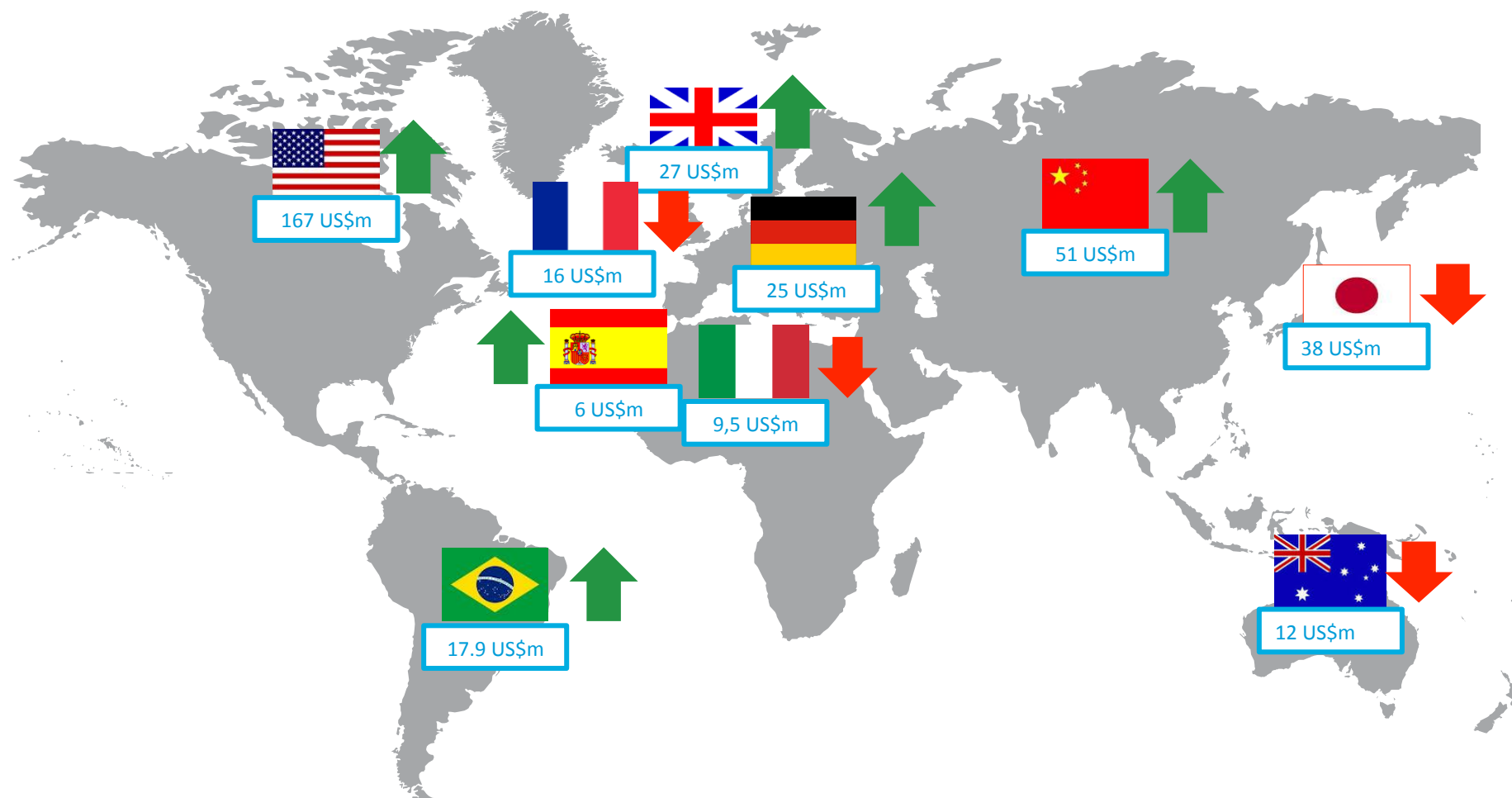
LA PUBBLICITA' NEL 2014

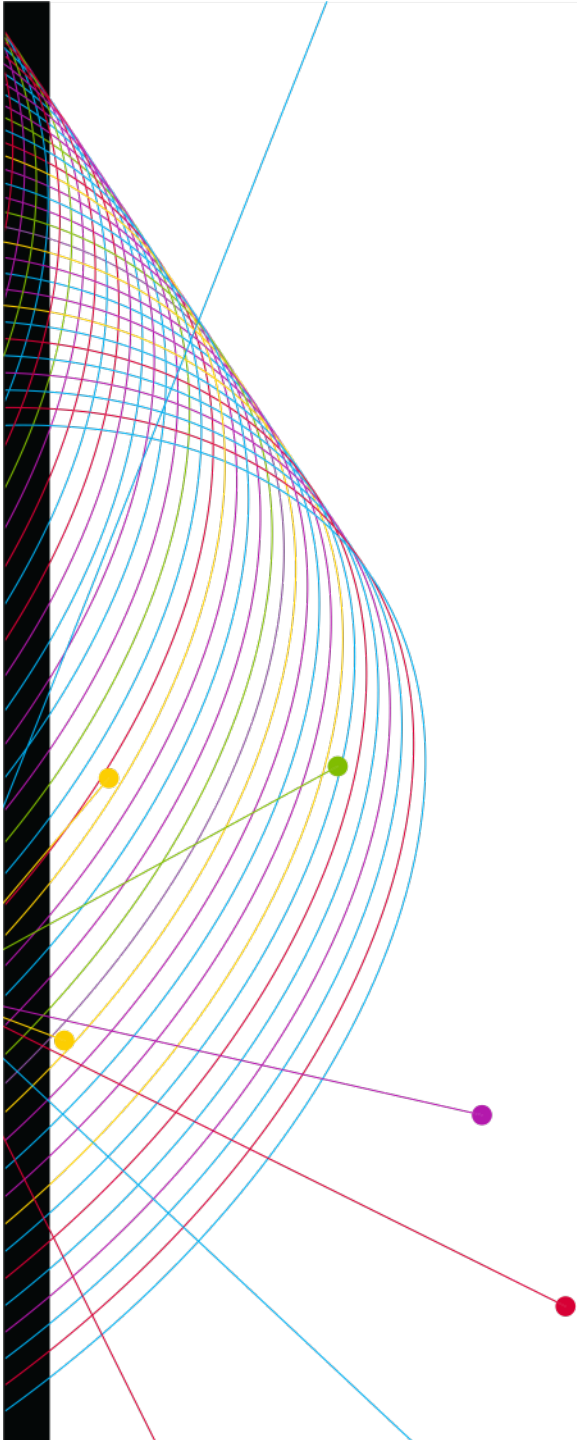
Alberto Dal Sasso
Milano, 11 febbraio 2015

IL CONTESTO INTERNAZIONALE



L'ADVERTISING NEL MONDO

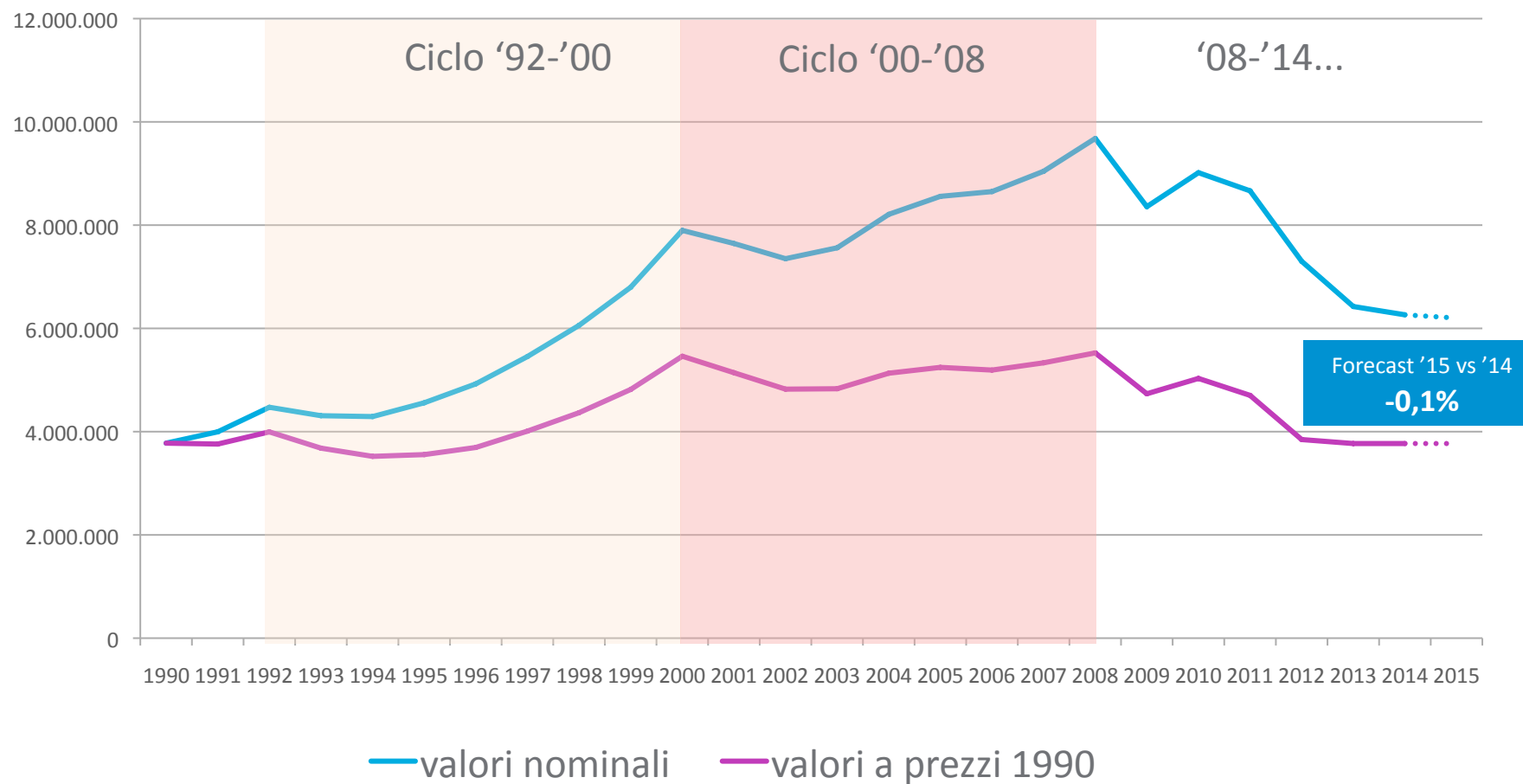




ITALIA

IL MERCATO NEGLI ULTIMI 25 ANNI (X1000€)

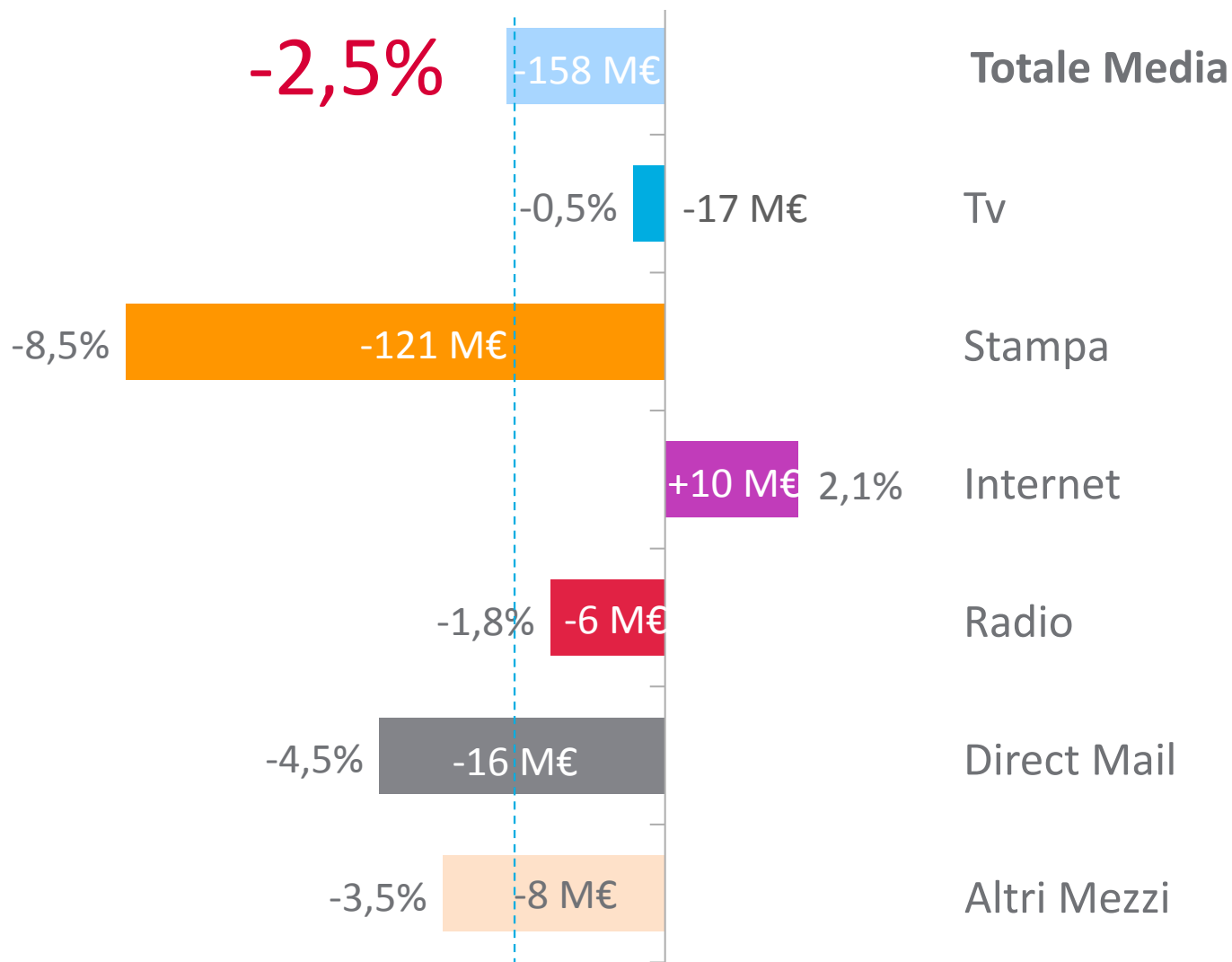
Assestamento su una nuova dimensione di investimento.



• ANDAMENTO DEI MEZZI

Coerente con le stime mensili

6.201 milioni di €

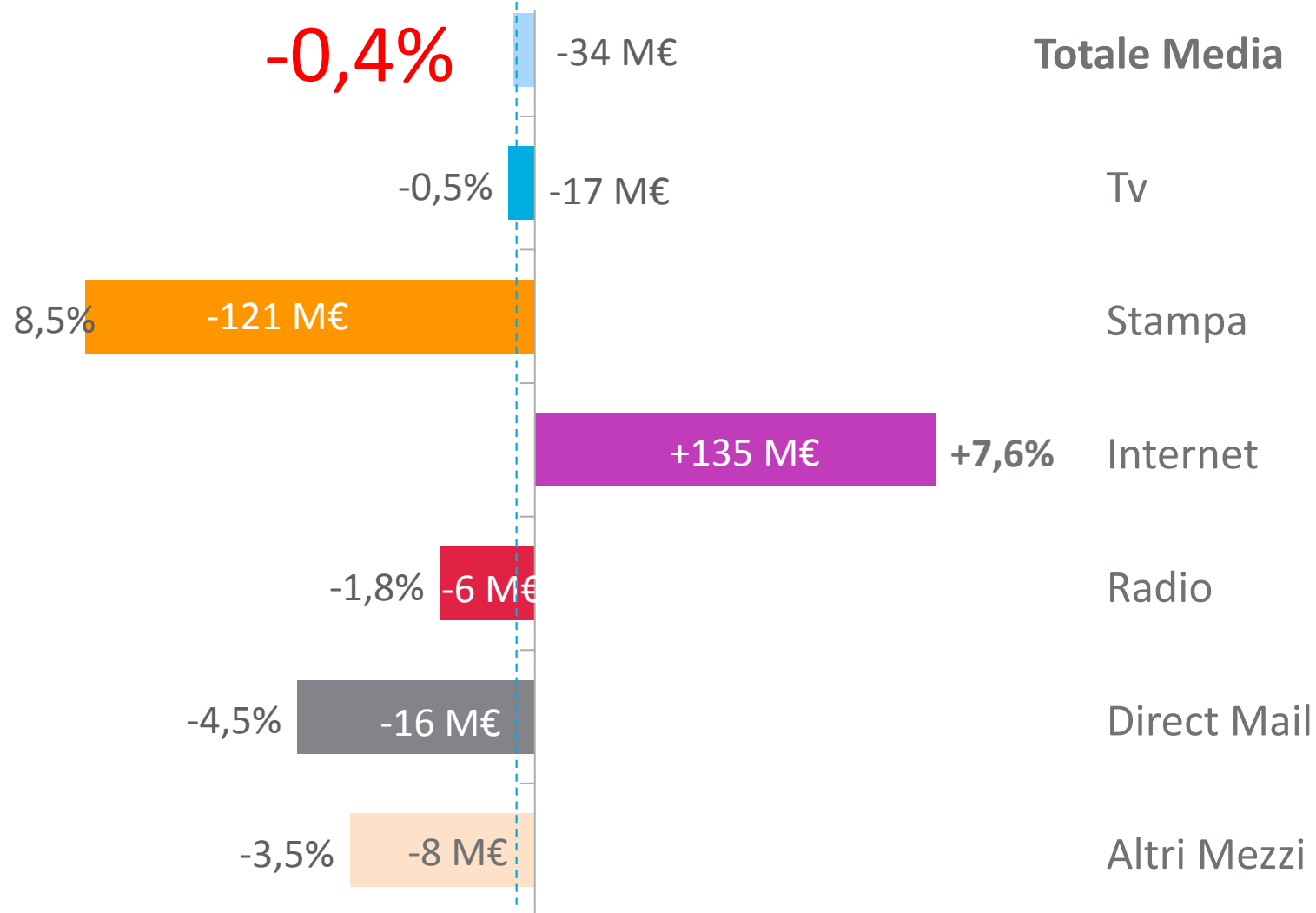


Stima AdEx del mercato pubblicitario anno 2014 vs 2013 – incluse tutte le tipologie pubblicitarie

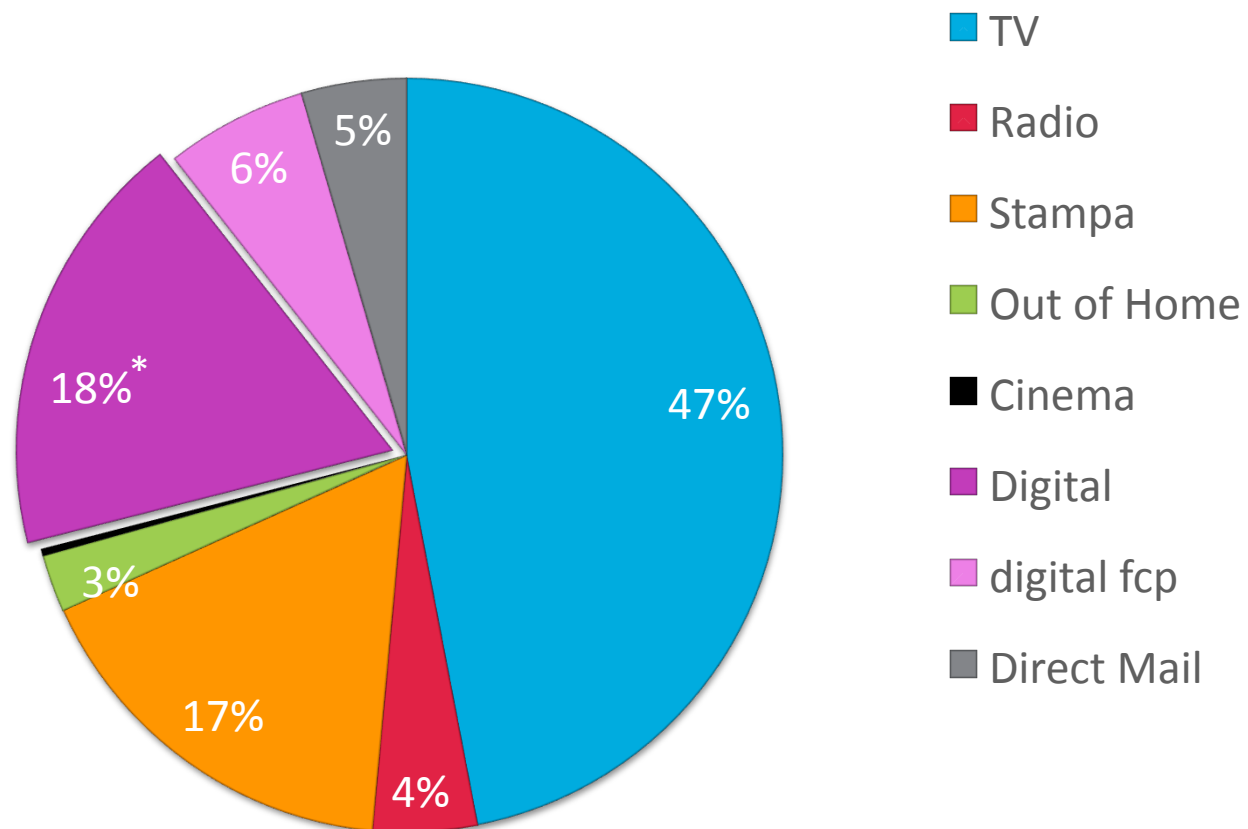
• ANDAMENTO DEI MEZZI

Con la stima totale del digital (Search Adv, Social Adv, Video Yt, Classified)

7.627 milioni di €



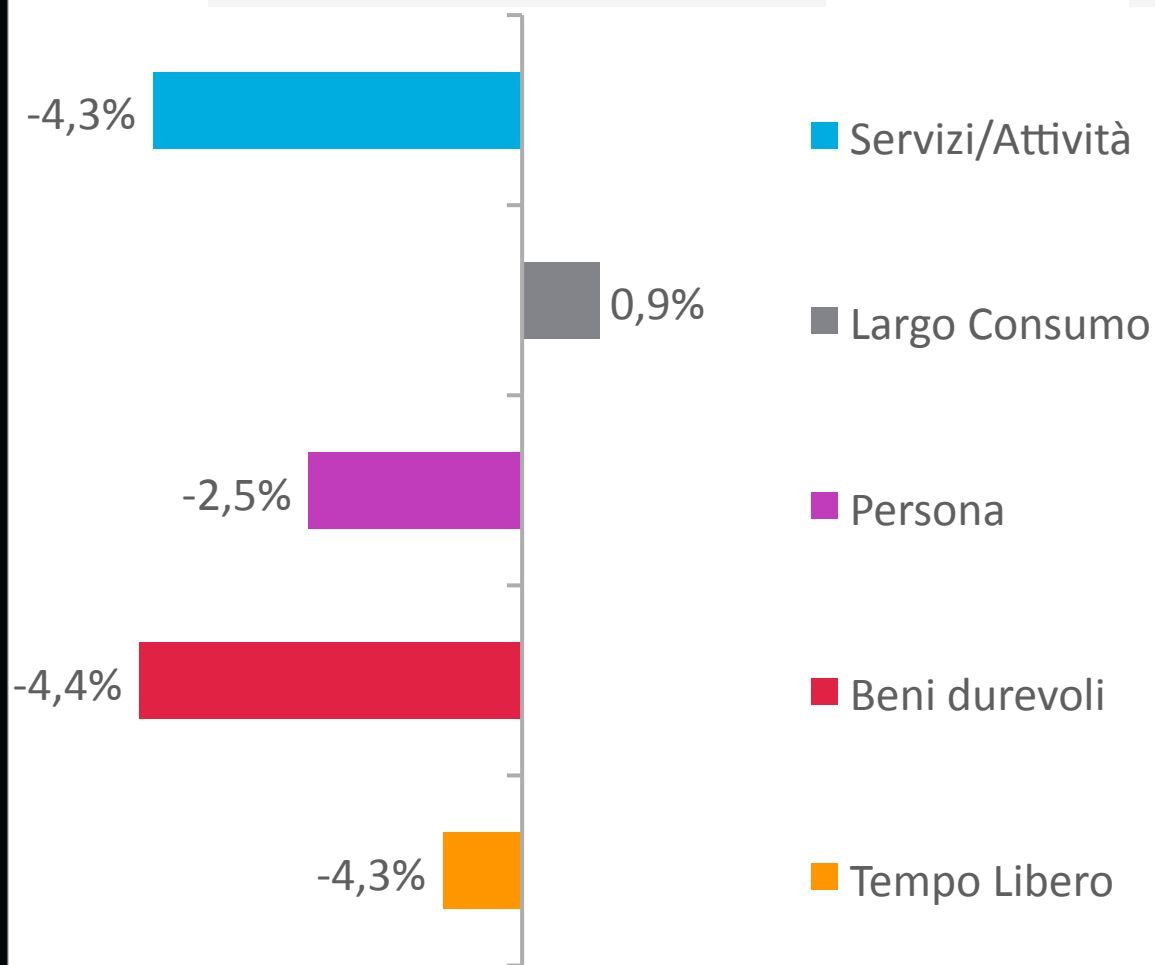
LE QUOTE DEI MEZZI NEL 2014



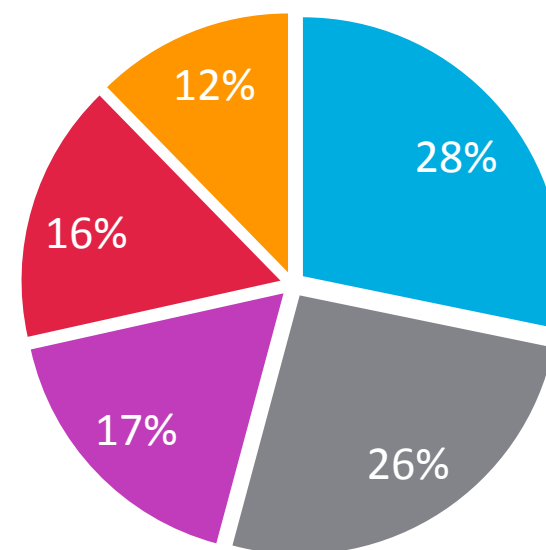
(*) Digital Advertising: dati Nielsen - Stima Nielsen 2014 del digitale non rilevato con dettaglio da Nielsen ed FCP

L'ANDAMENTO DEI MACROSETTORI

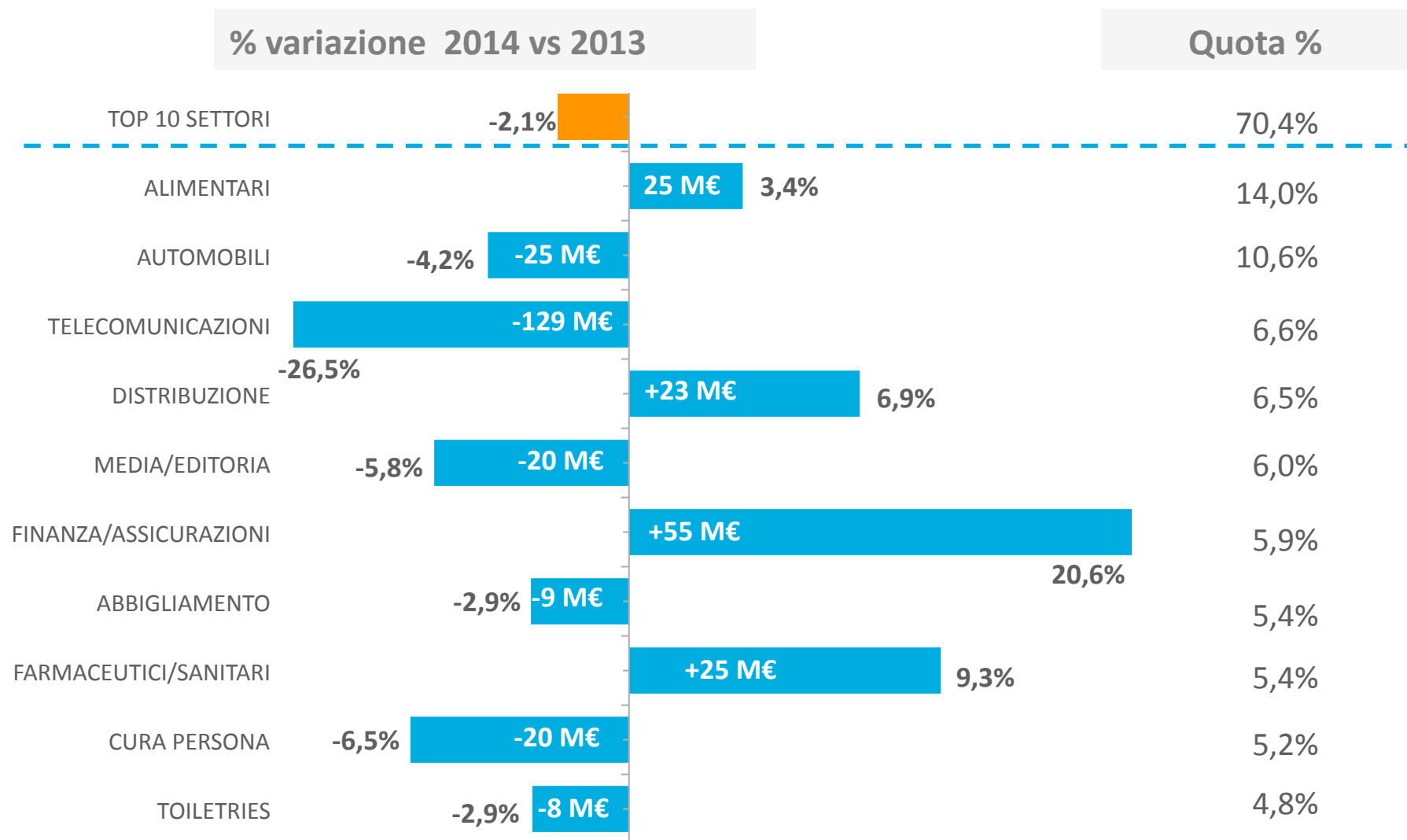
% variazione 2014 vs 2013



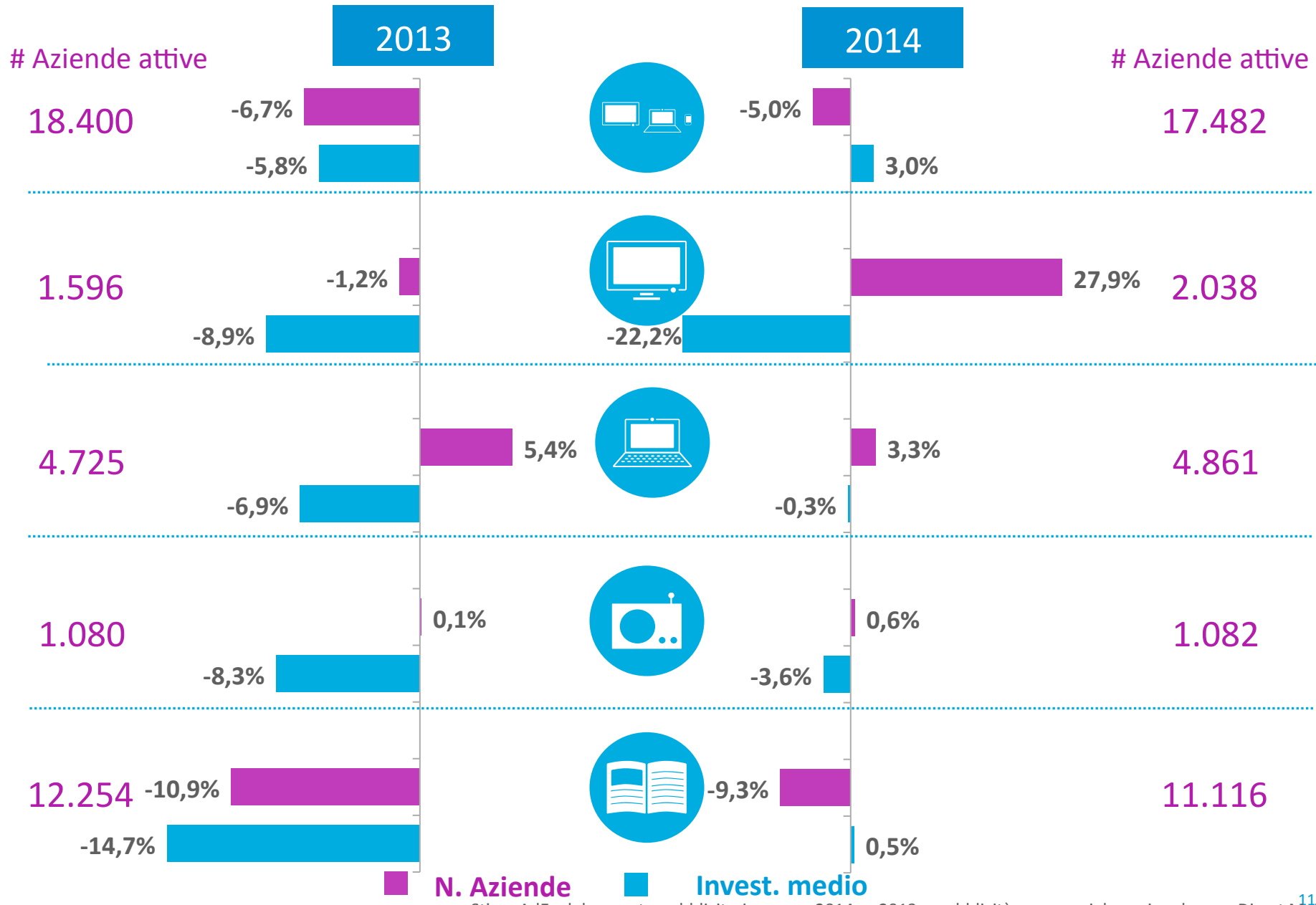
% quota 2014 su totale mercato



TOP 10 SETTORI – L' ANDAMENTO

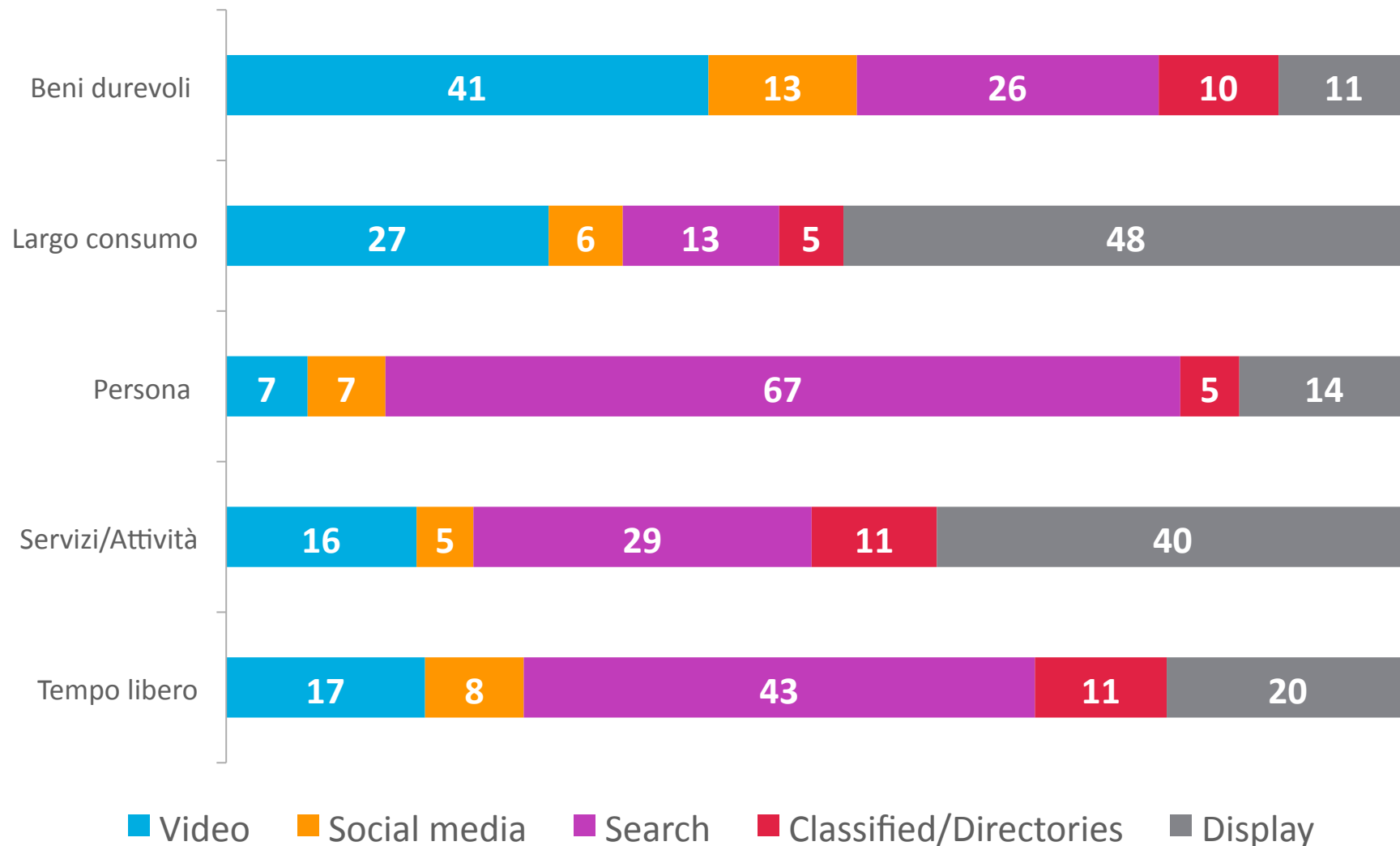


NUMERO AZIENDE E INVESTIMENTO MEDIO

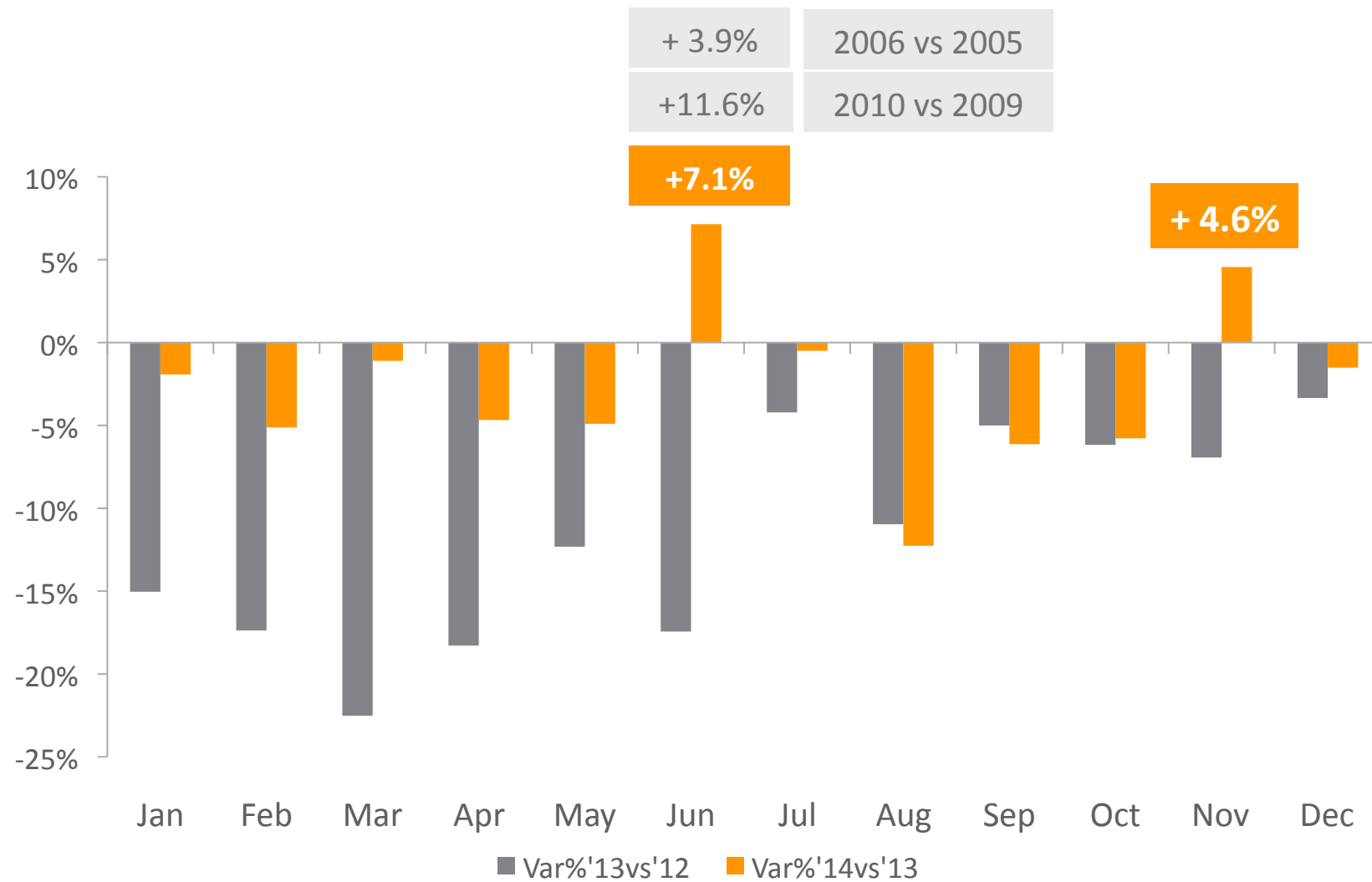


MIX DIGITAL NEI MACROSETTORI

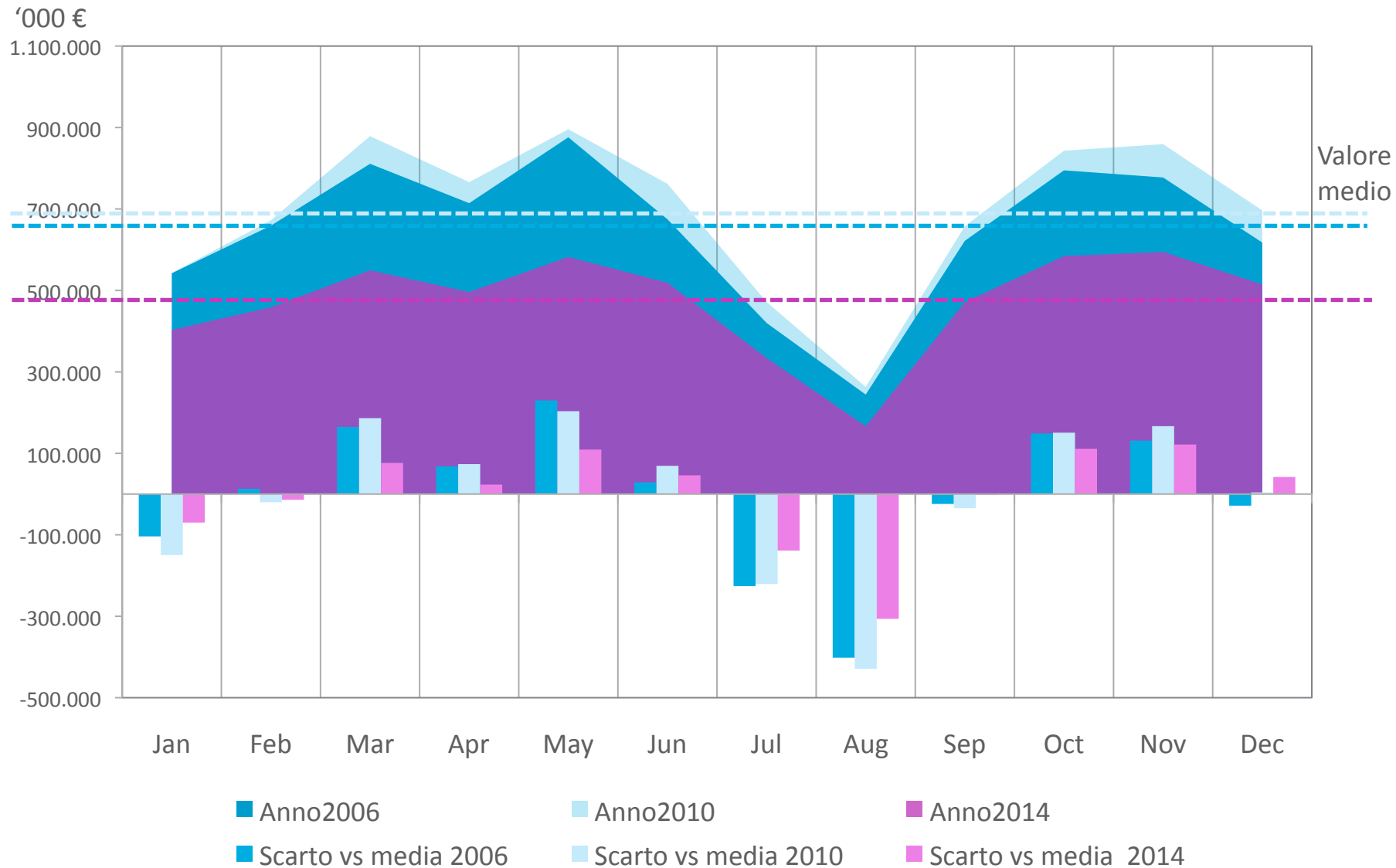
Valori percentuali

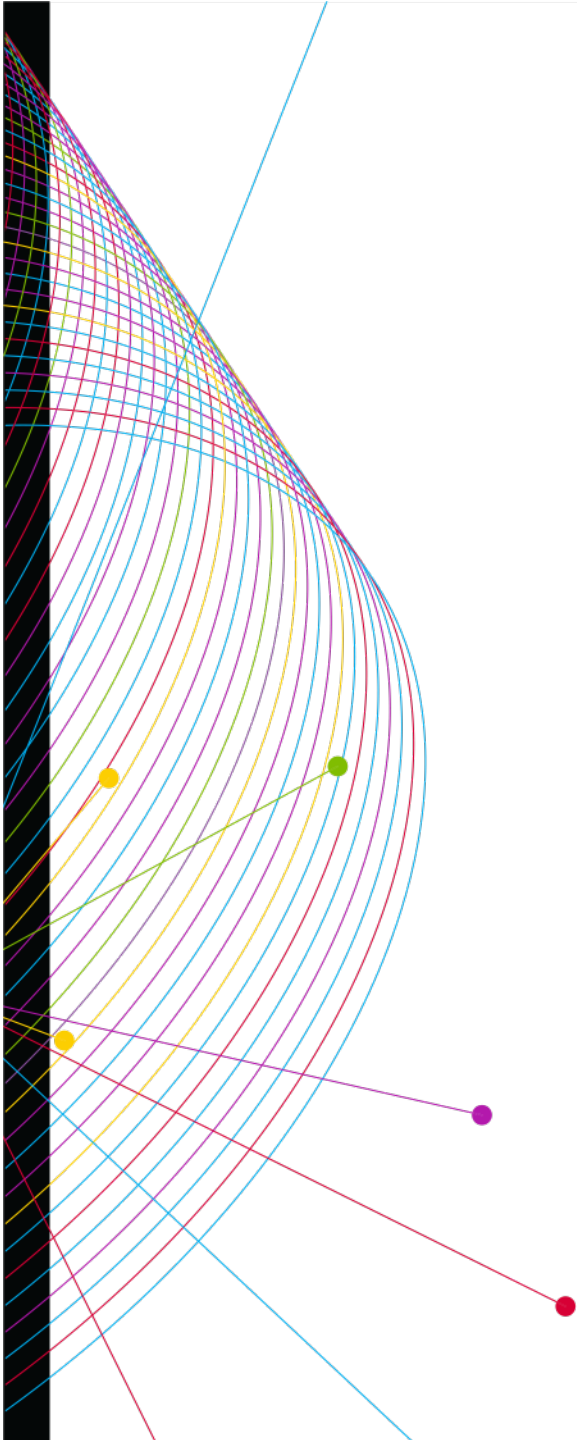


GIUGNO E NOVEMBRE POSITIVI RISPETTO AL 2013



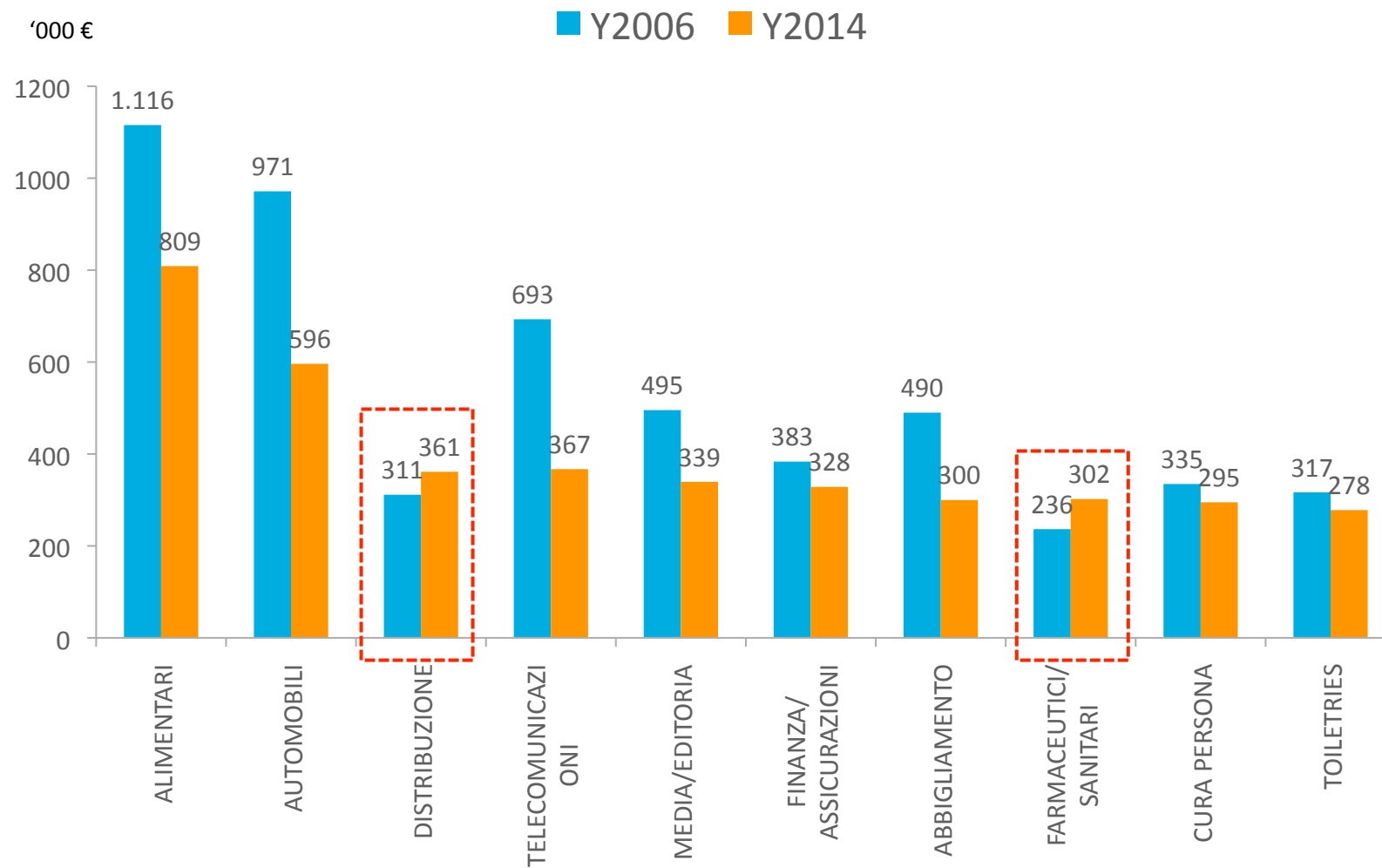
LA STAGIONALITA' NON SI MODIFICA NEGLI ANNI



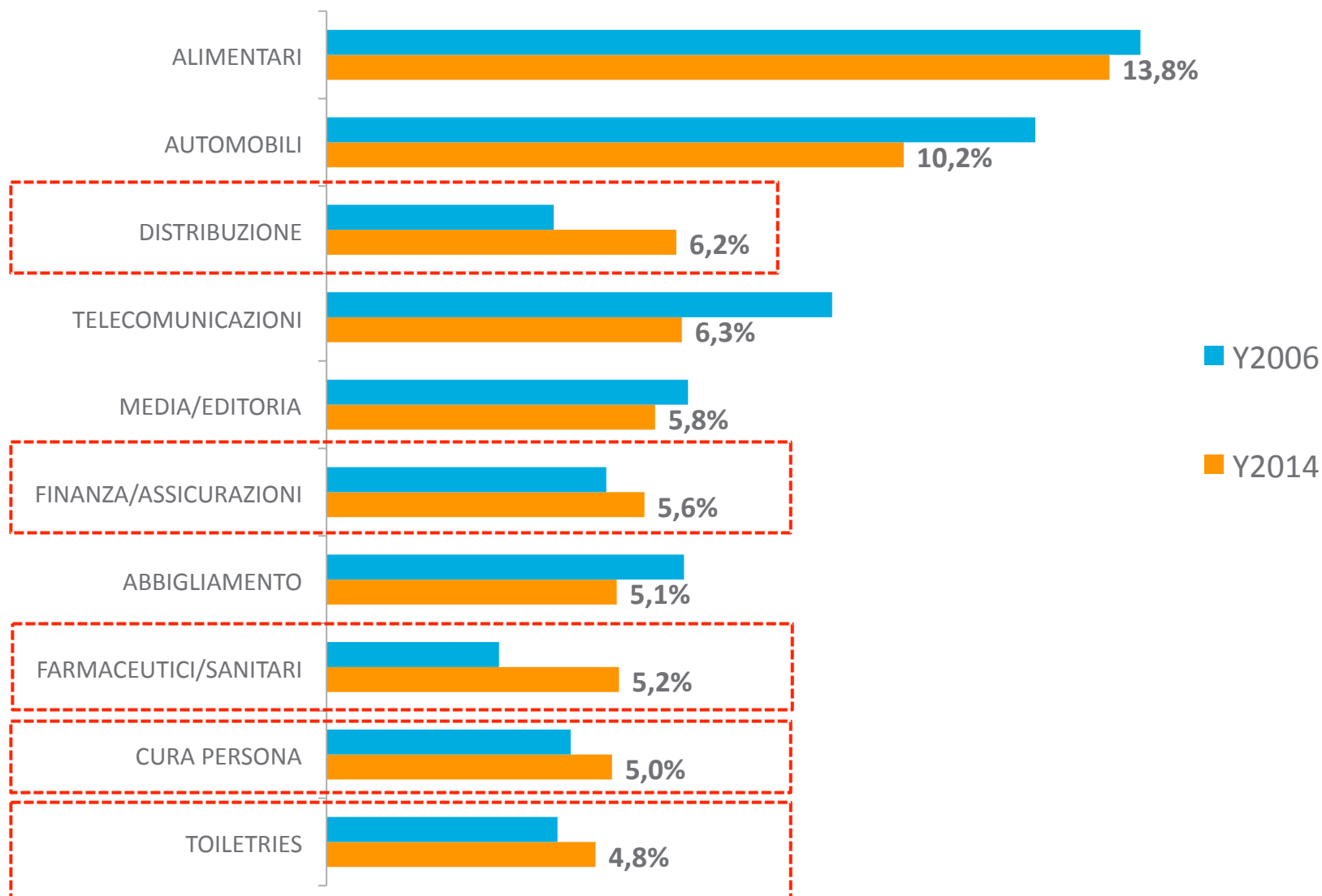


CONFRONTO DI MEDIO PERIODO

TRA I TOP 10 SETTORI, IN LEGGERA CRESCITA SOLO IL FARMACEUTICO E LA DISTRIBUZIONE



TRA I TOP 10 SETTORI 5 AUMENTANO LA LORO QUOTA



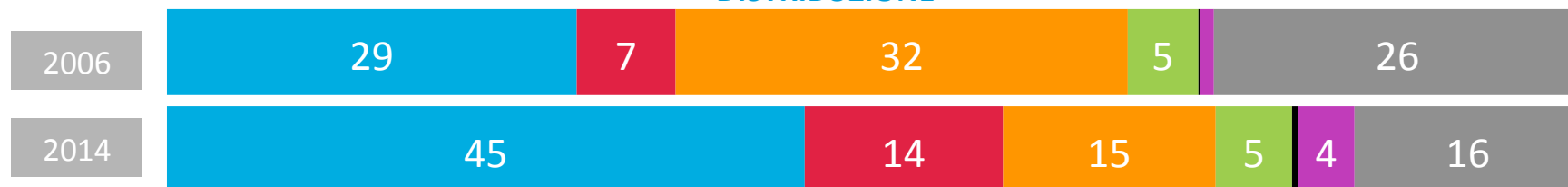
IL MEDIA MIX DEI SETTORI CHE AUMENTANO LA LORO QUOTA

Valori percentuali

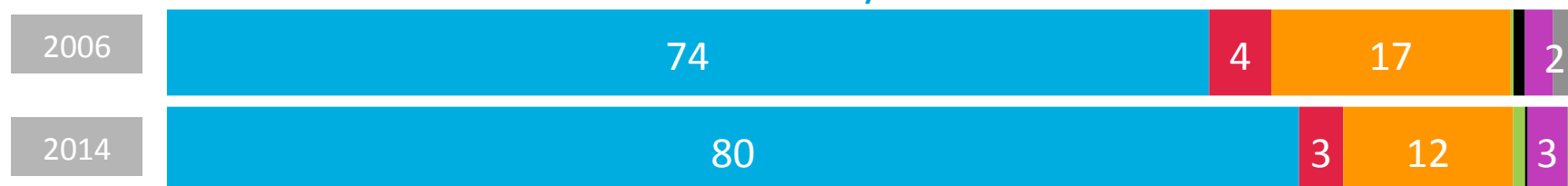
FINANZA/ASSICURAZIONI



DISTRIBUZIONE



FARMACEUTICI/SANITARI



0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

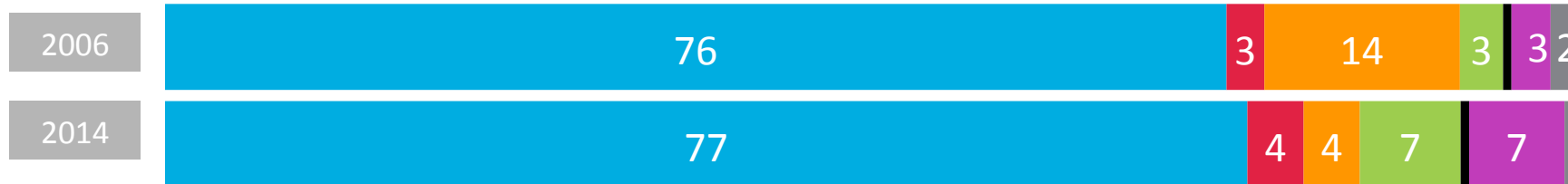
■ Television ■ Radio ■ Stampa ■ OutOfHome ■ Cinema ■ Internet ■ Direct Mail

IL MEDIA MIX DEI SETTORI CHE DIMINUISCONO LA LORO QUOTA



Valori percentuali

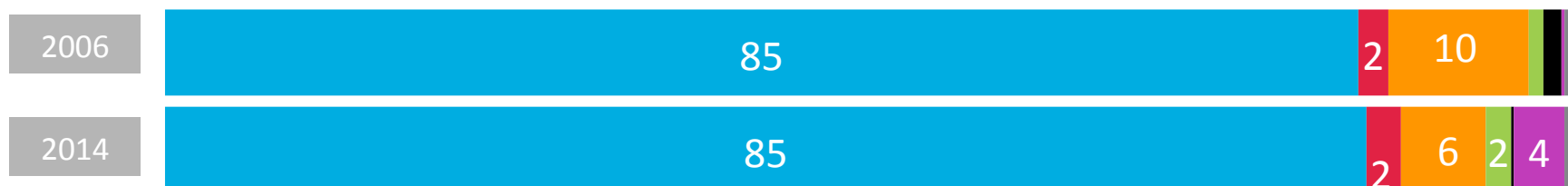
TELECOMUNICAZIONI



AUTOMOBILI



ALIMENTARI

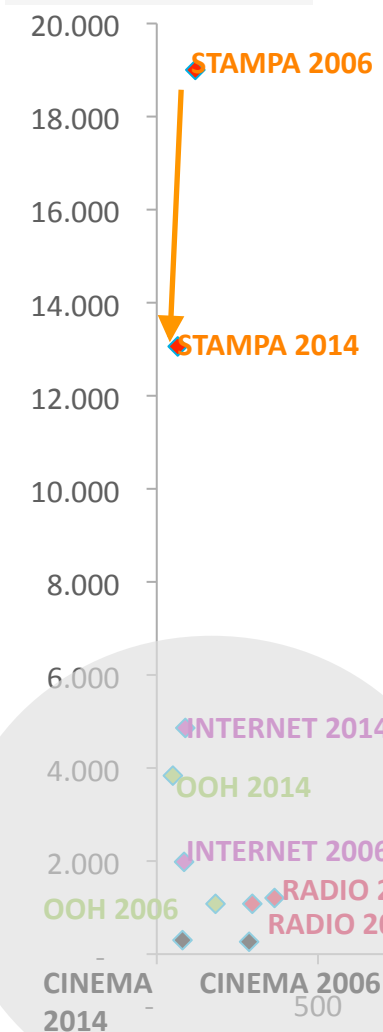


0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

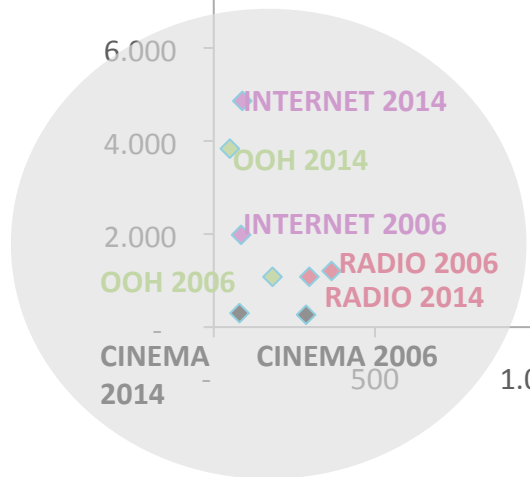
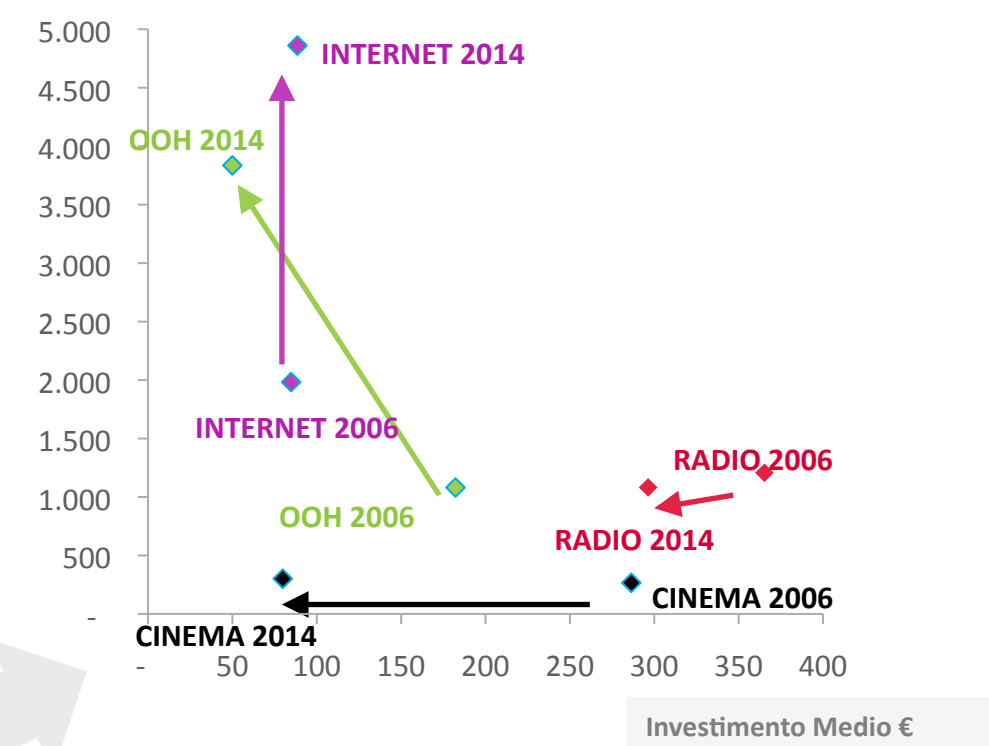
■ Television ■ Radio ■ Stampa ■ OutOfHome ■ Cinema ■ Internet ■ Direct Mail

LE AZIENDE E L'INVESTIMENTO MEDIO DEI MEZZI NEL 2006 E NEL 2014

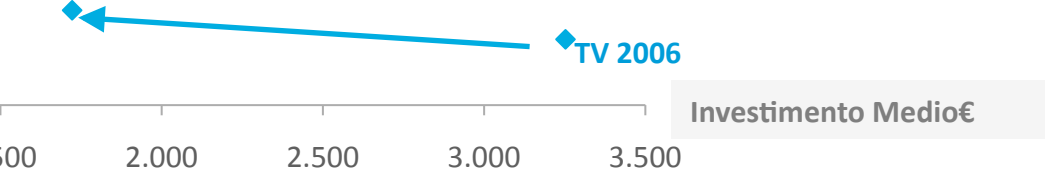
Numero Aziende



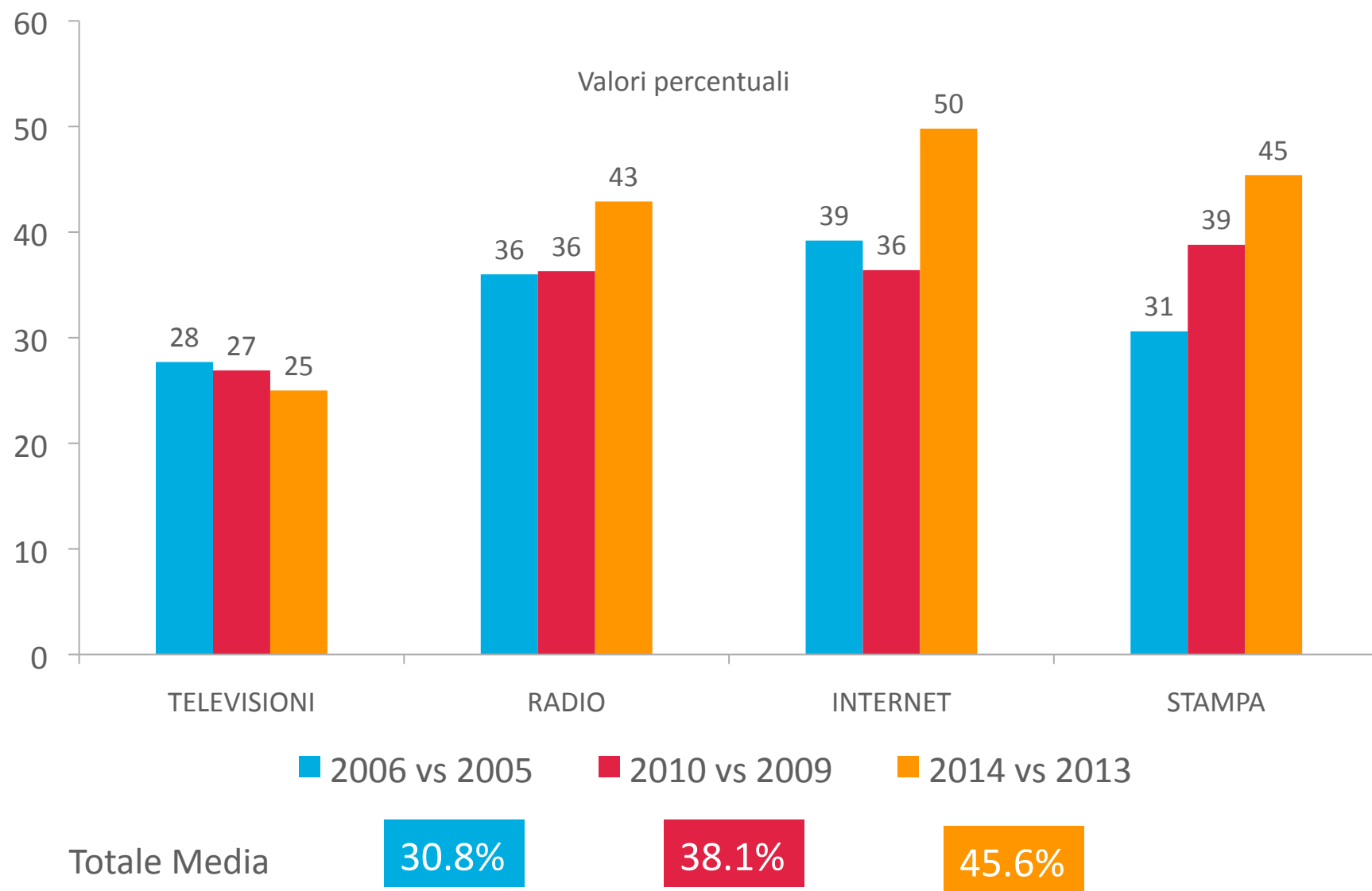
Numero Aziende



TV 2014



IL TASSO DI ROTAZIONE DELLE AZIENDE NEGLI ANNI



I MACROSETTORI E I MEZZI: L'EVOLUZIONE

Largo Consumo



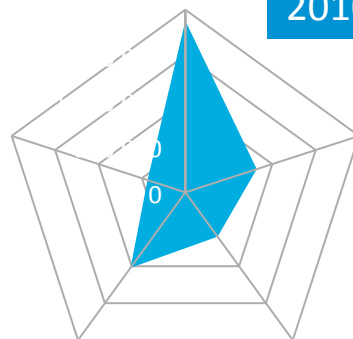
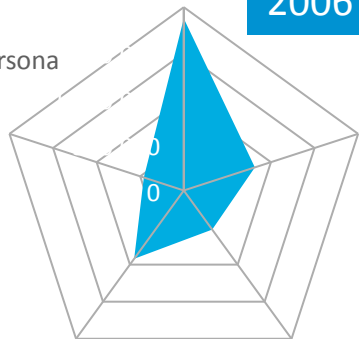
Investimenti pubblicitari a valore

2006

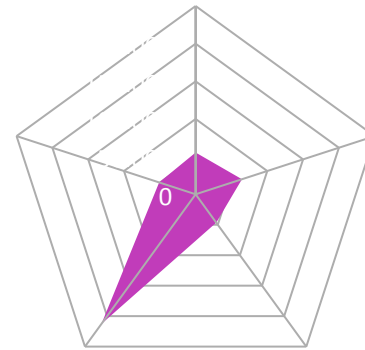
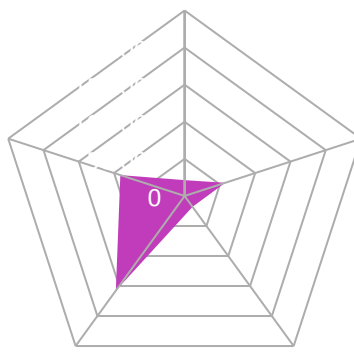
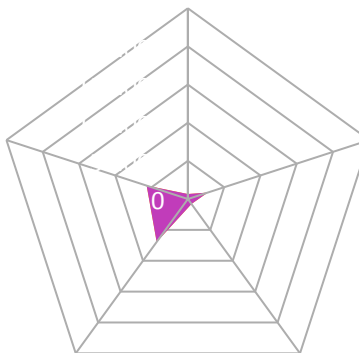
2010

2014

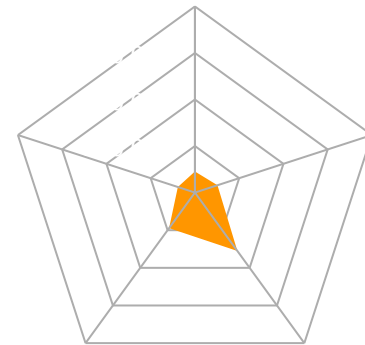
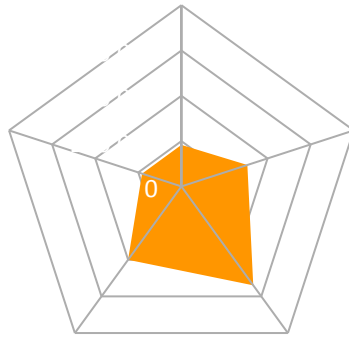
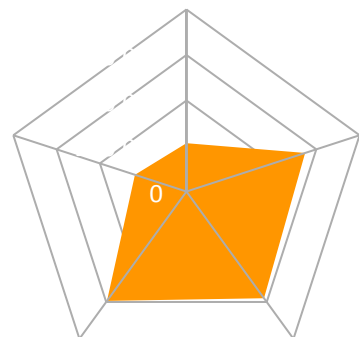
TV



INTERNET



STAMPA



GRAZIE

nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™

