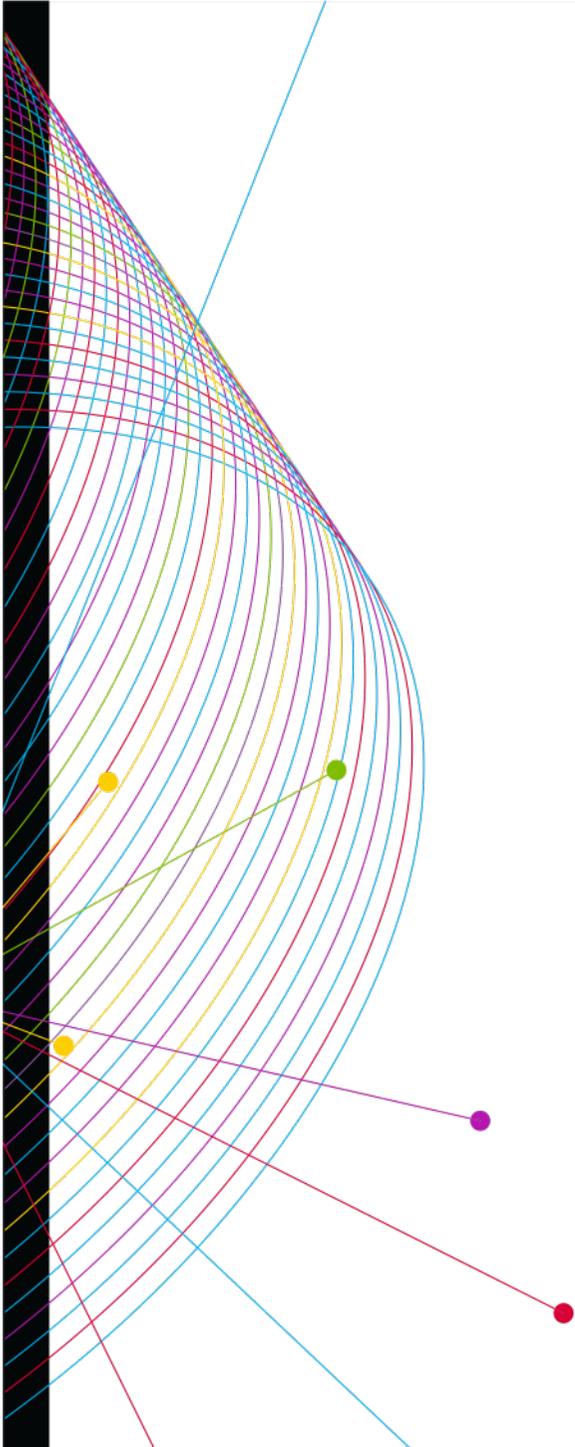


nielsen

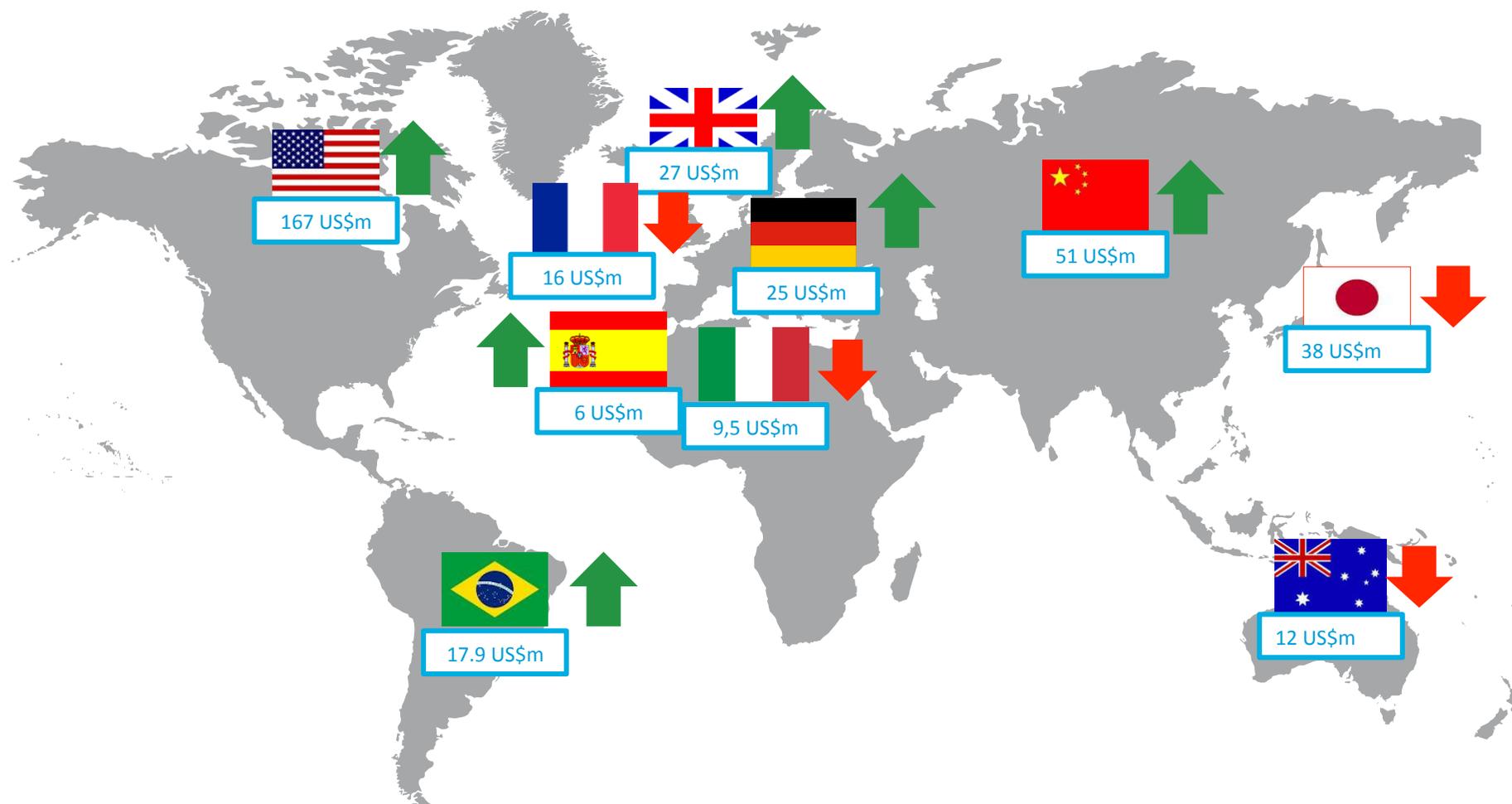
LA PUBBLICITA' NEL 2014

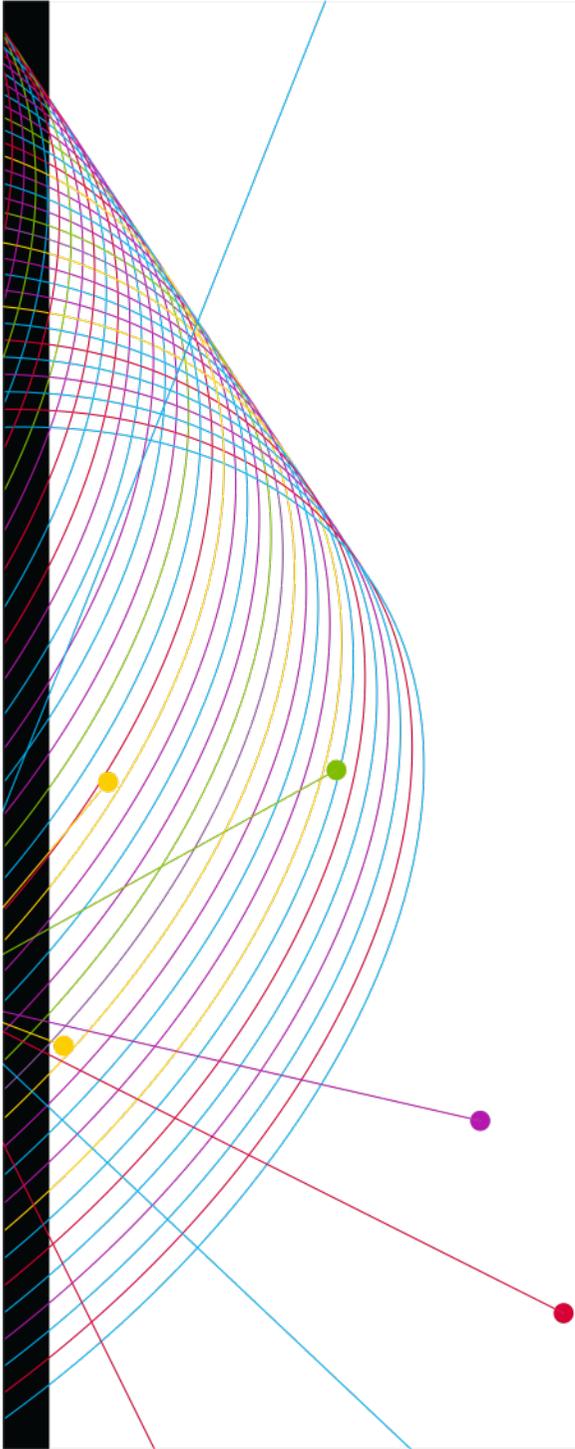
Alberto Dal Sasso
Milano, 11 febbraio 2015

IL CONTESTO INTERNAZIONALE



L'ADVERTISING NEL MONDO

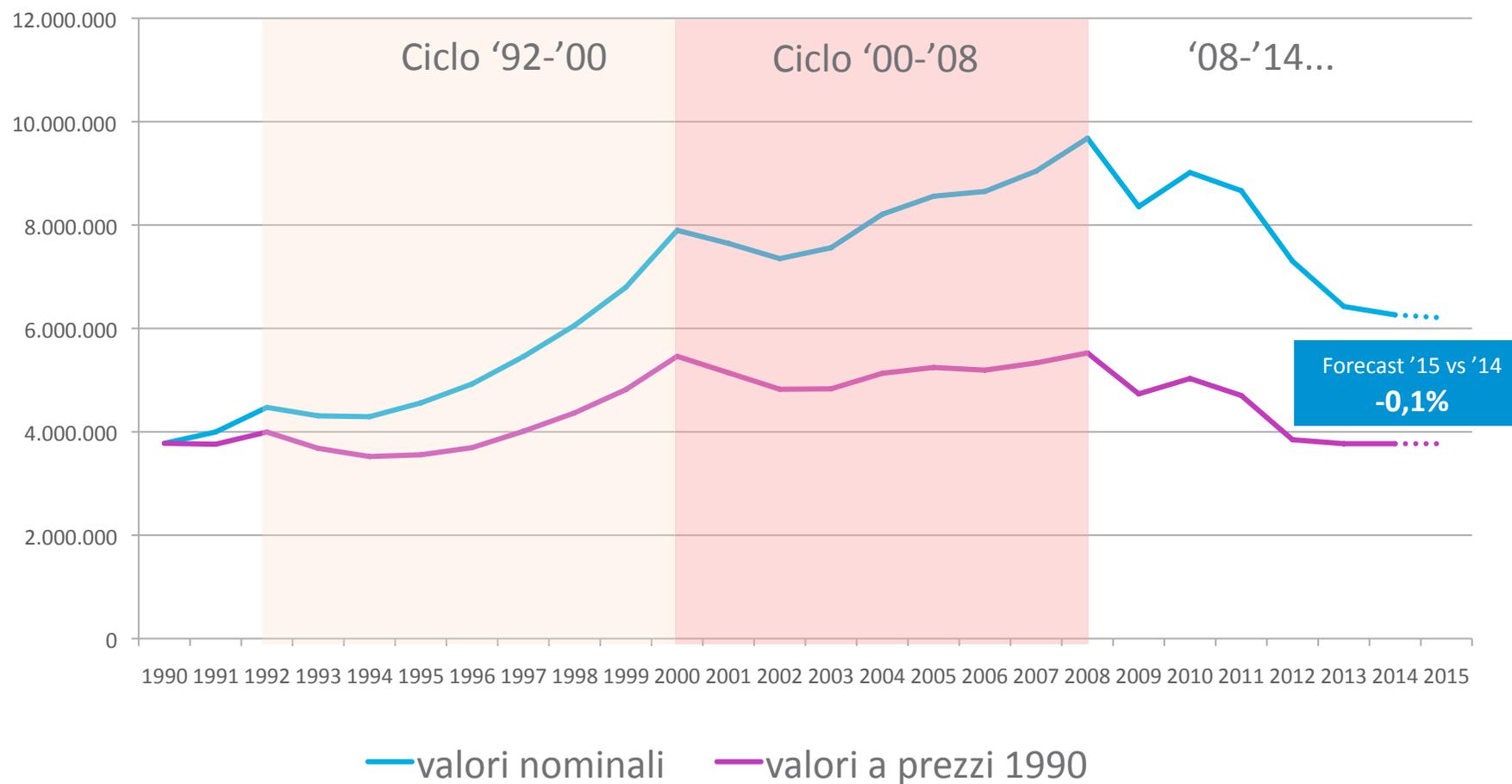




ITALIA

IL MERCATO NEGLI ULTIMI 25 ANNI (X1000€)

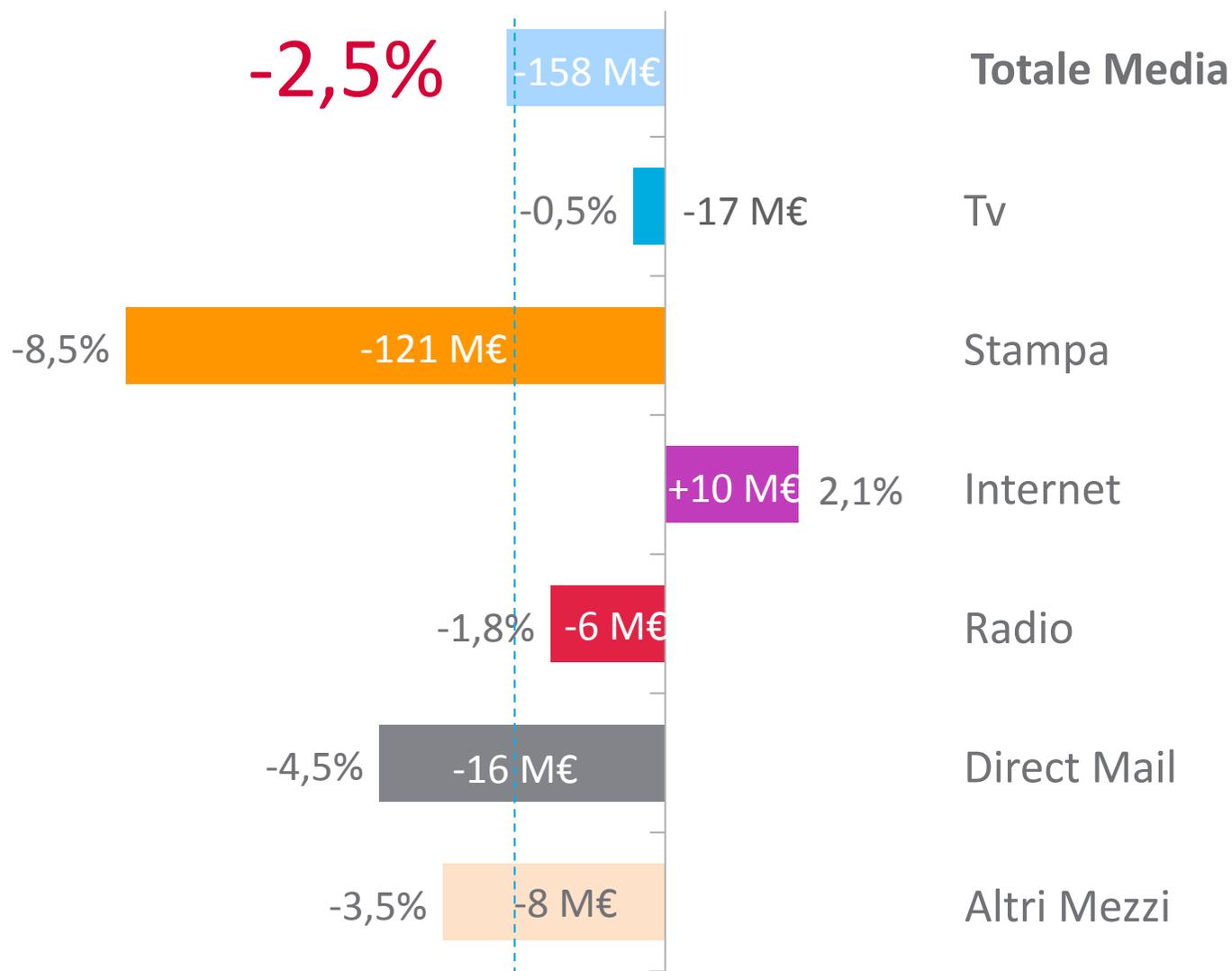
Assestamento su una nuova dimensione di investimento.



• ANDAMENTO DEI MEZZI

Coerente con le stime mensili

6.201 milioni di €

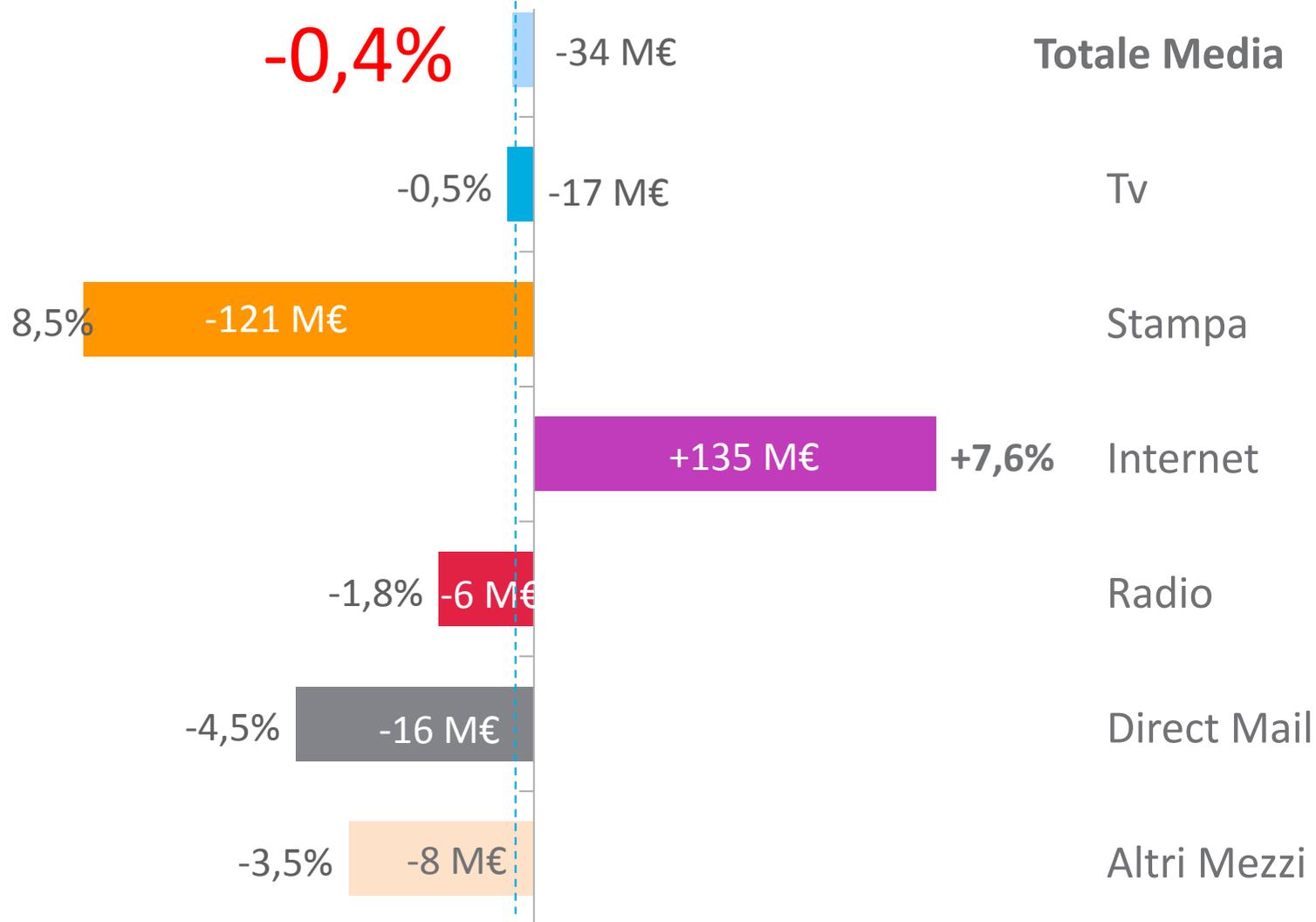


Stima AdEx del mercato pubblicitario anno 2014 vs 2013 – incluse tutte le tipologie pubblicitarie

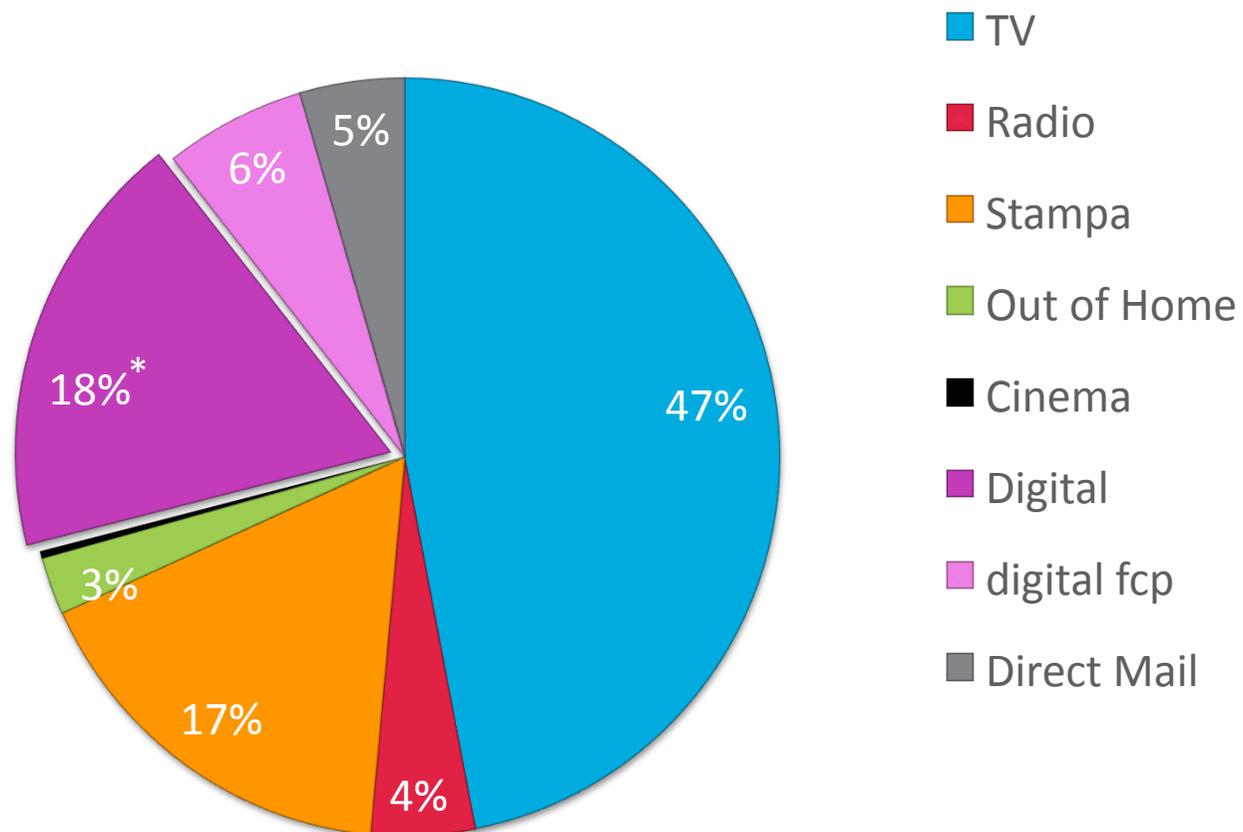
• ANDAMENTO DEI MEZZI

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

7.627 milioni di €



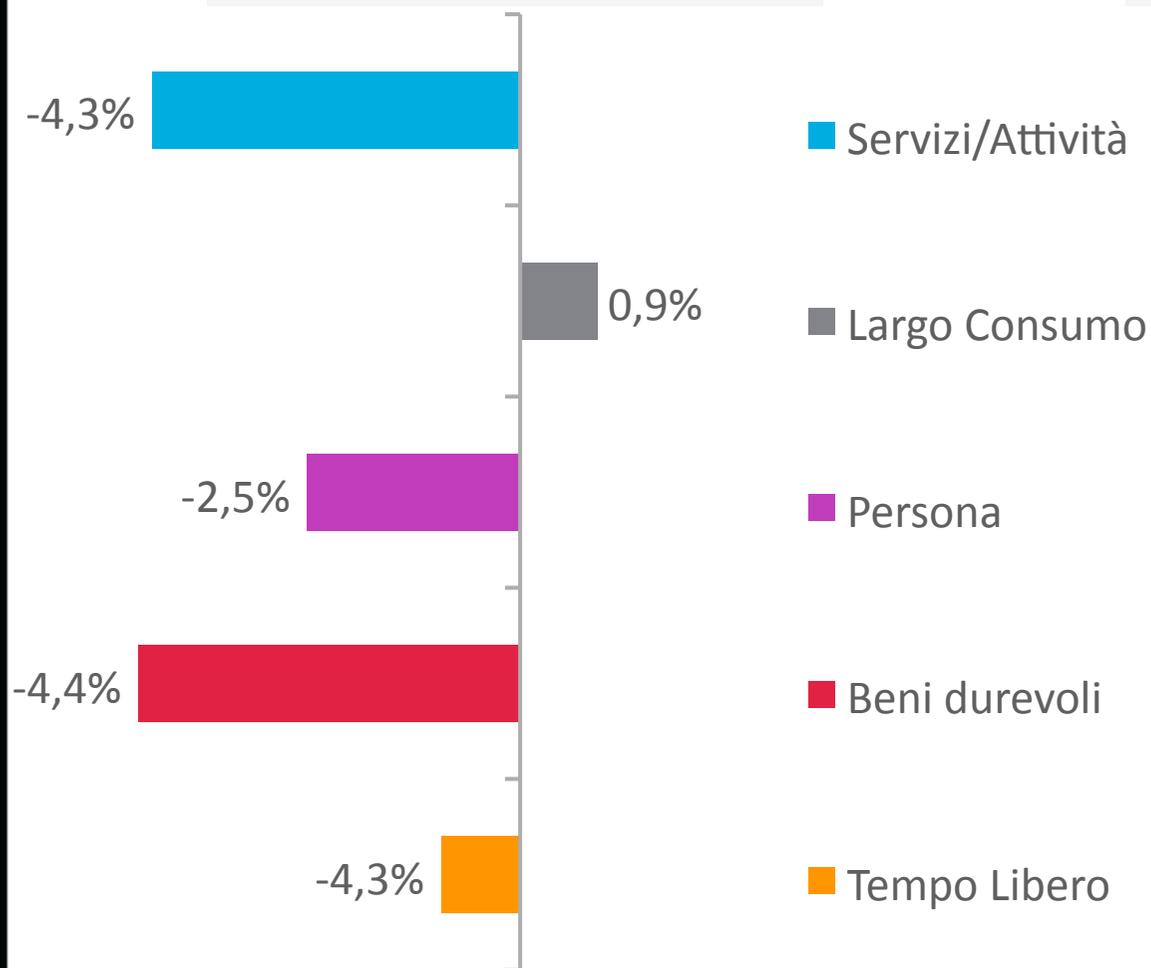
LE QUOTE DEI MEZZI NEL 2014



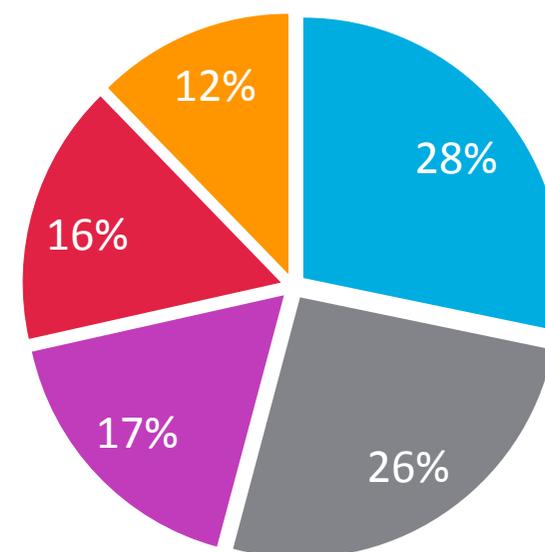
(*) Digital Advertising: dati Nielsen - Stima Nielsen 2014 del digitale non rilevato con dettaglio da Nielsen ed FCP

L'ANDAMENTO DEI MACROSETTORI

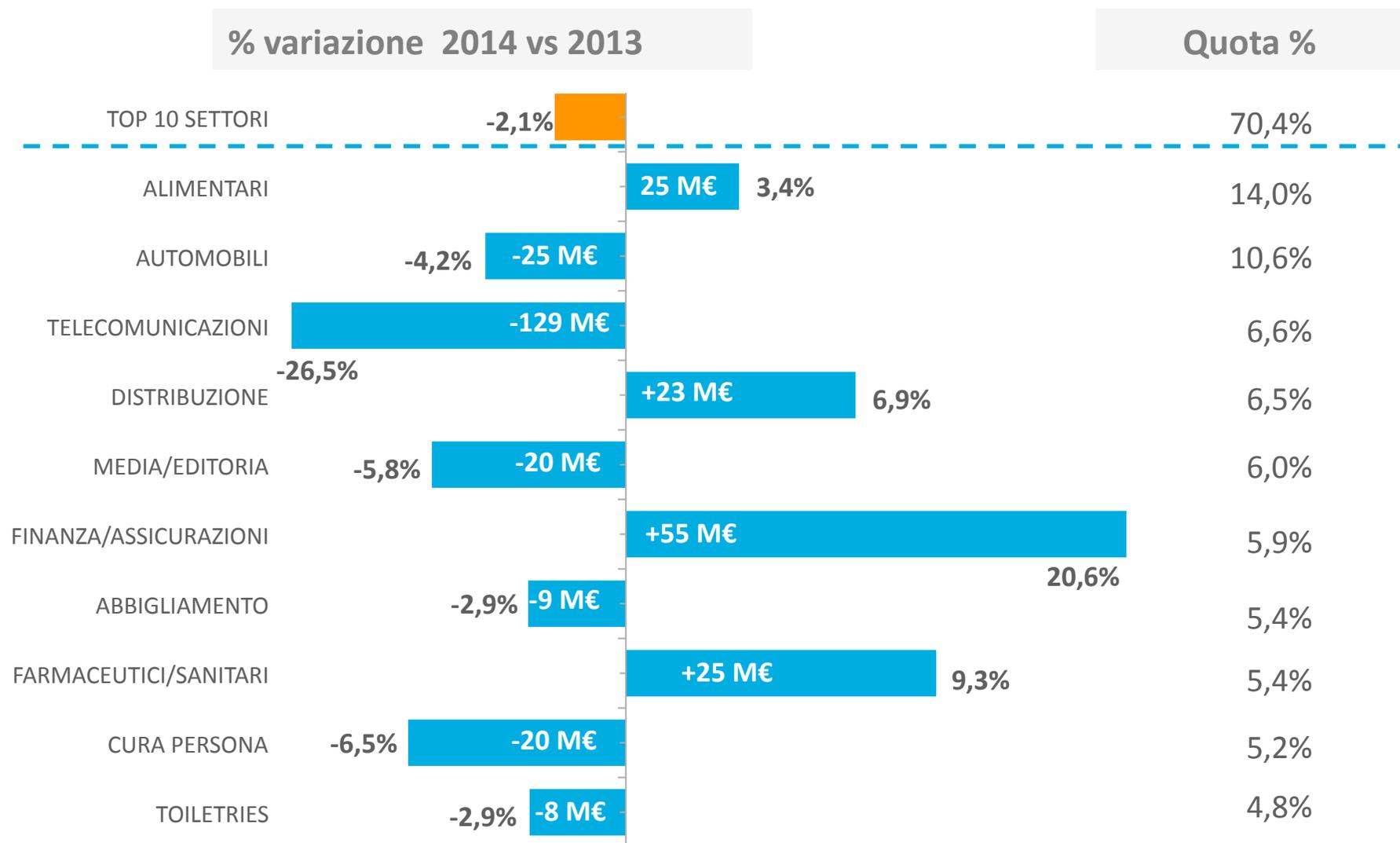
% variazione 2014 vs 2013



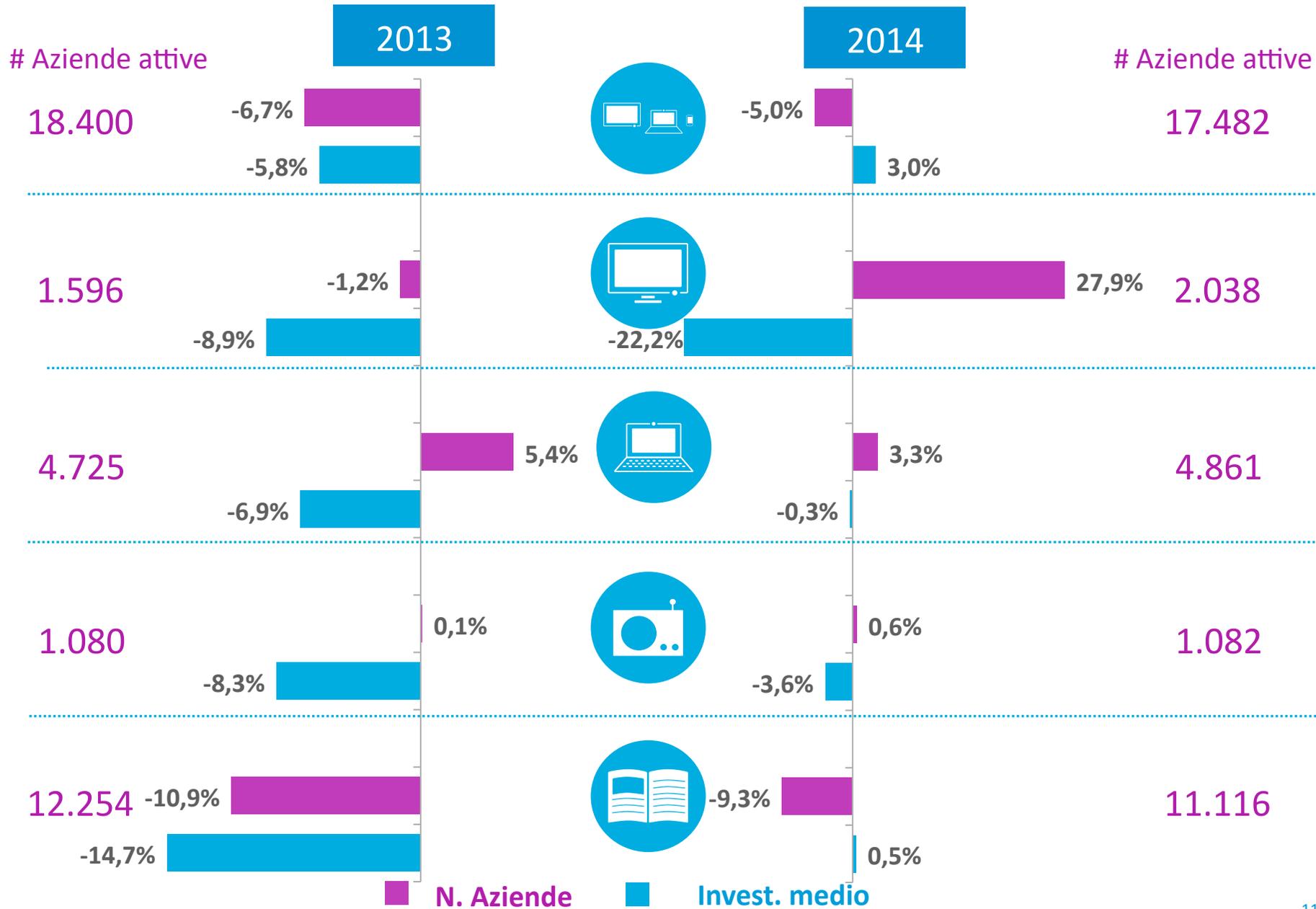
% quota 2014 su totale mercato



TOP 10 SETTORI – L' ANDAMENTO

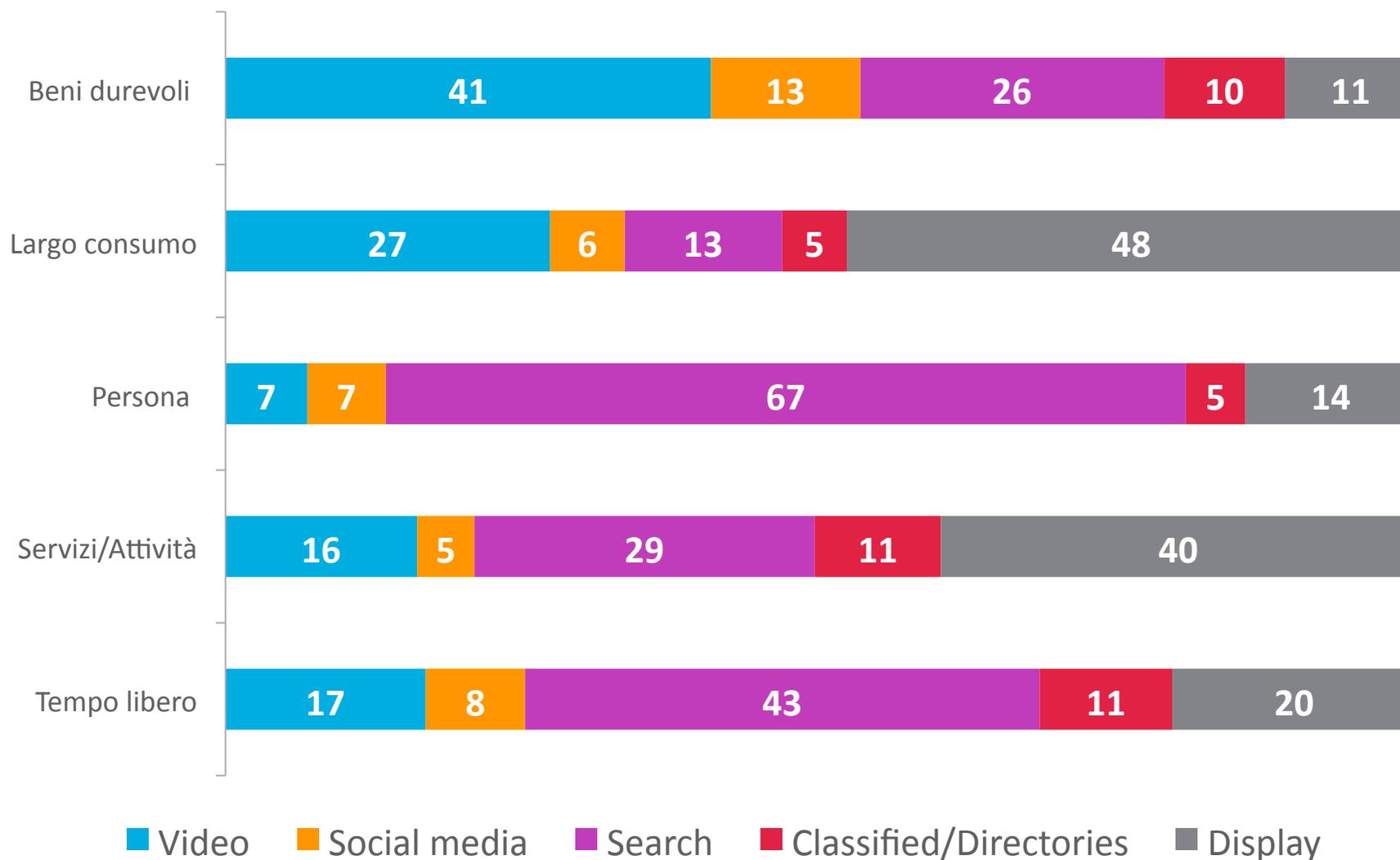


NUMERO AZIENDE E INVESTIMENTO MEDIO

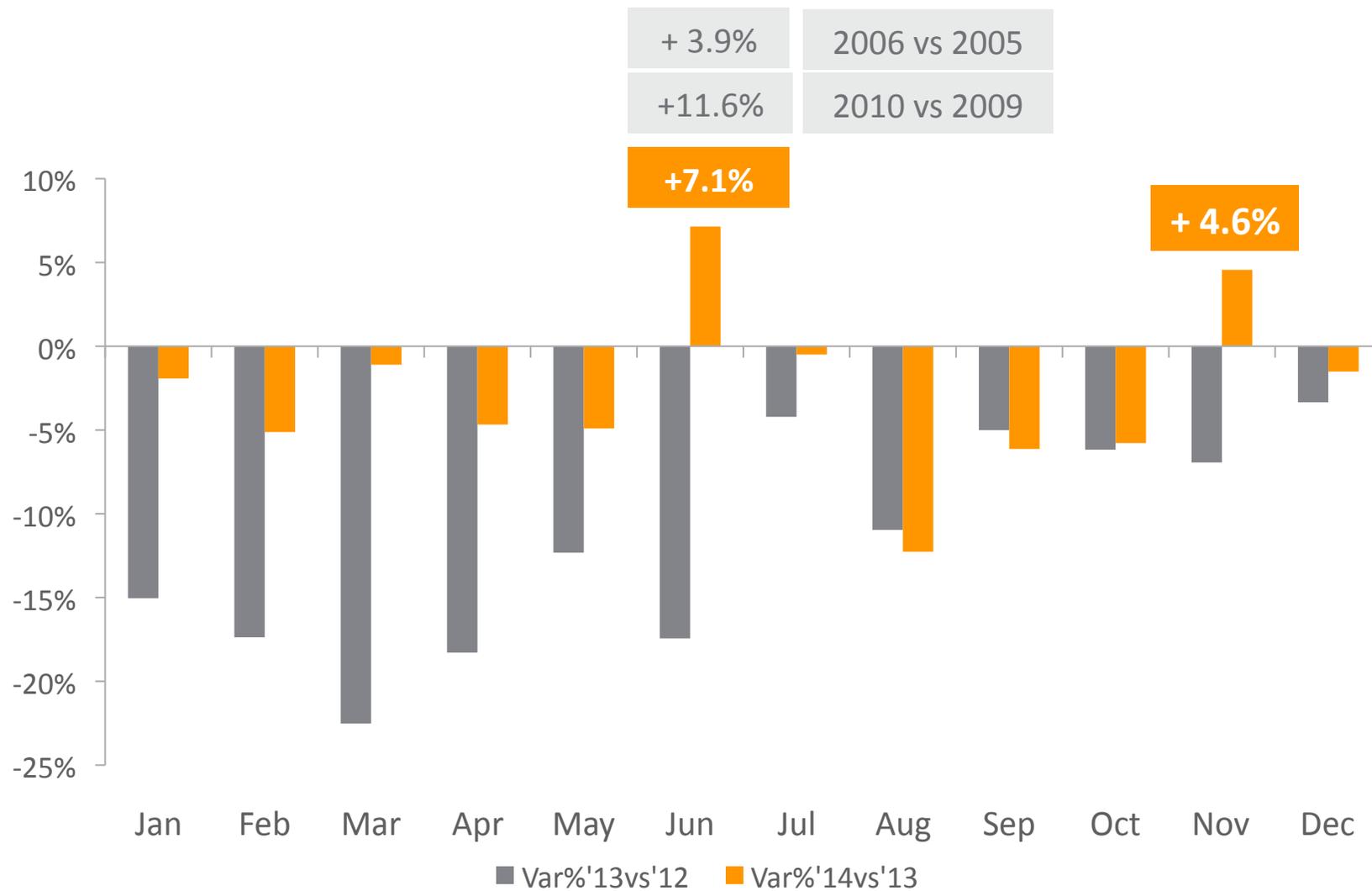


MIX DIGITAL NEI MACROSETTORI

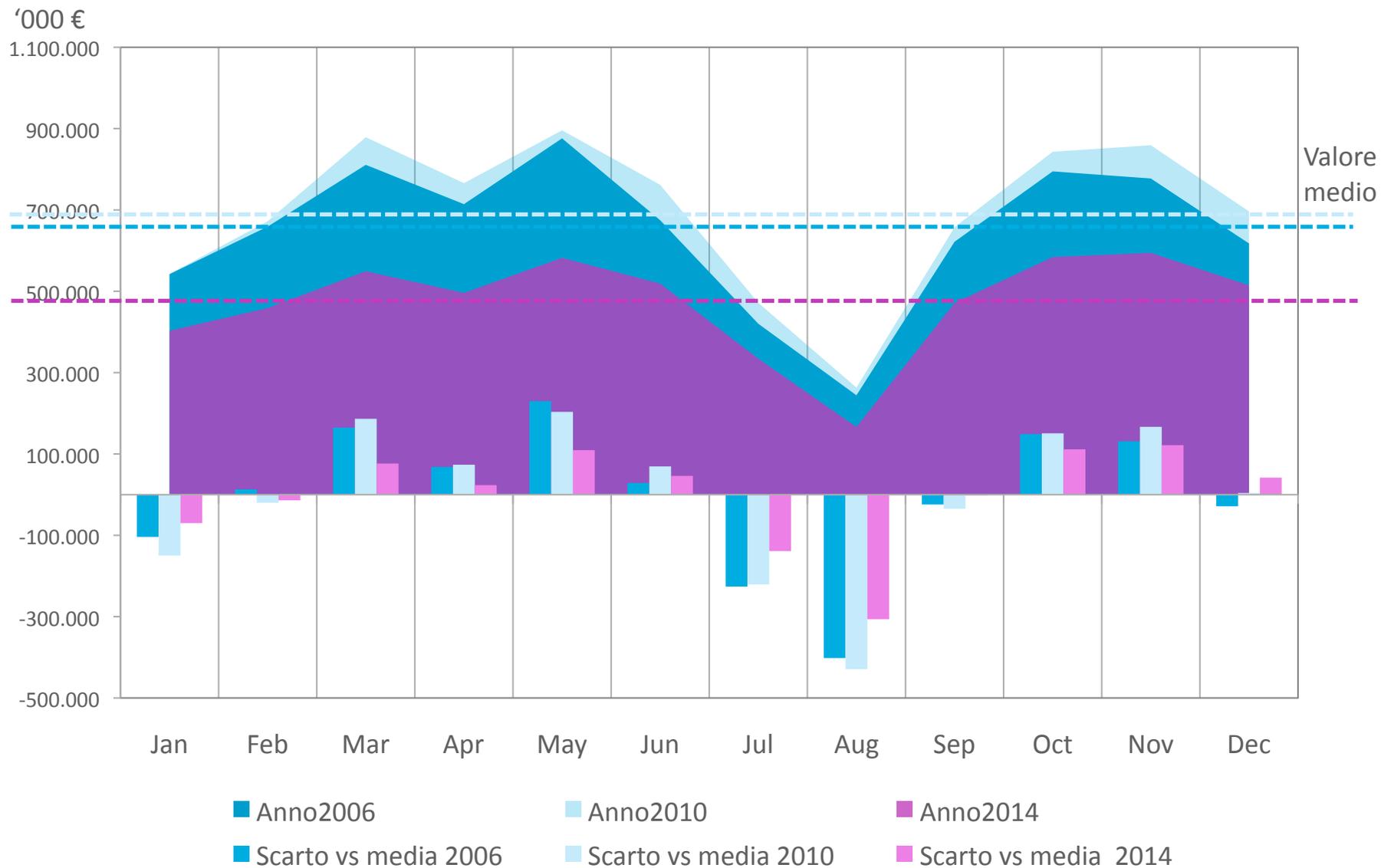
Valori percentuali

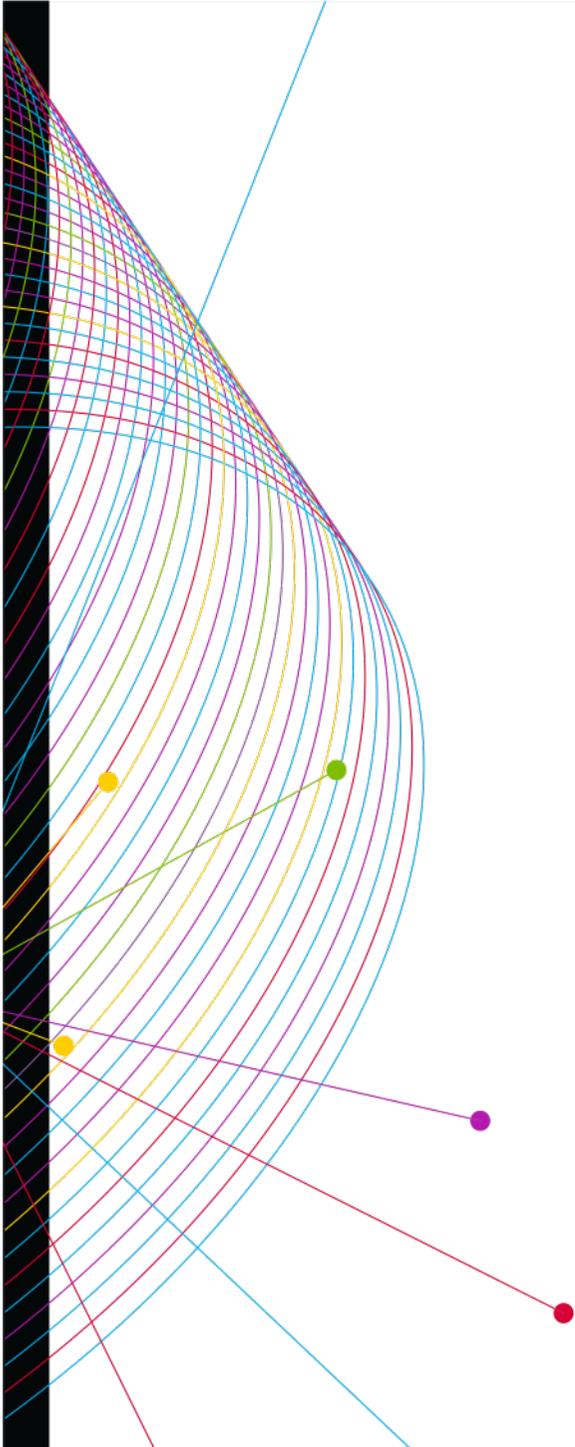


GIUGNO E NOVEMBRE POSITIVI RISPETTO AL 2013



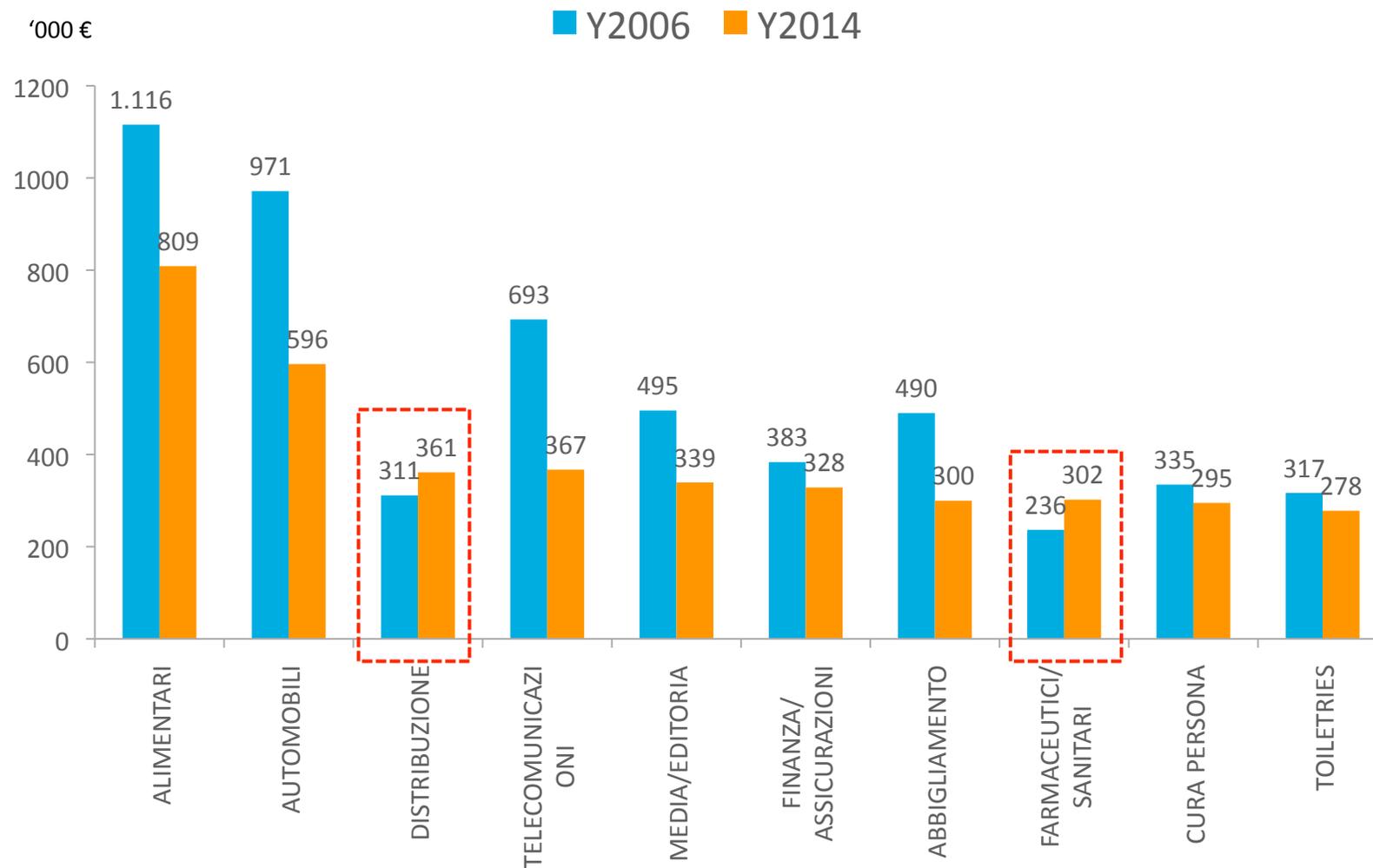
LA STAGIONALITA' NON SI MODIFICA NEGLI ANNI



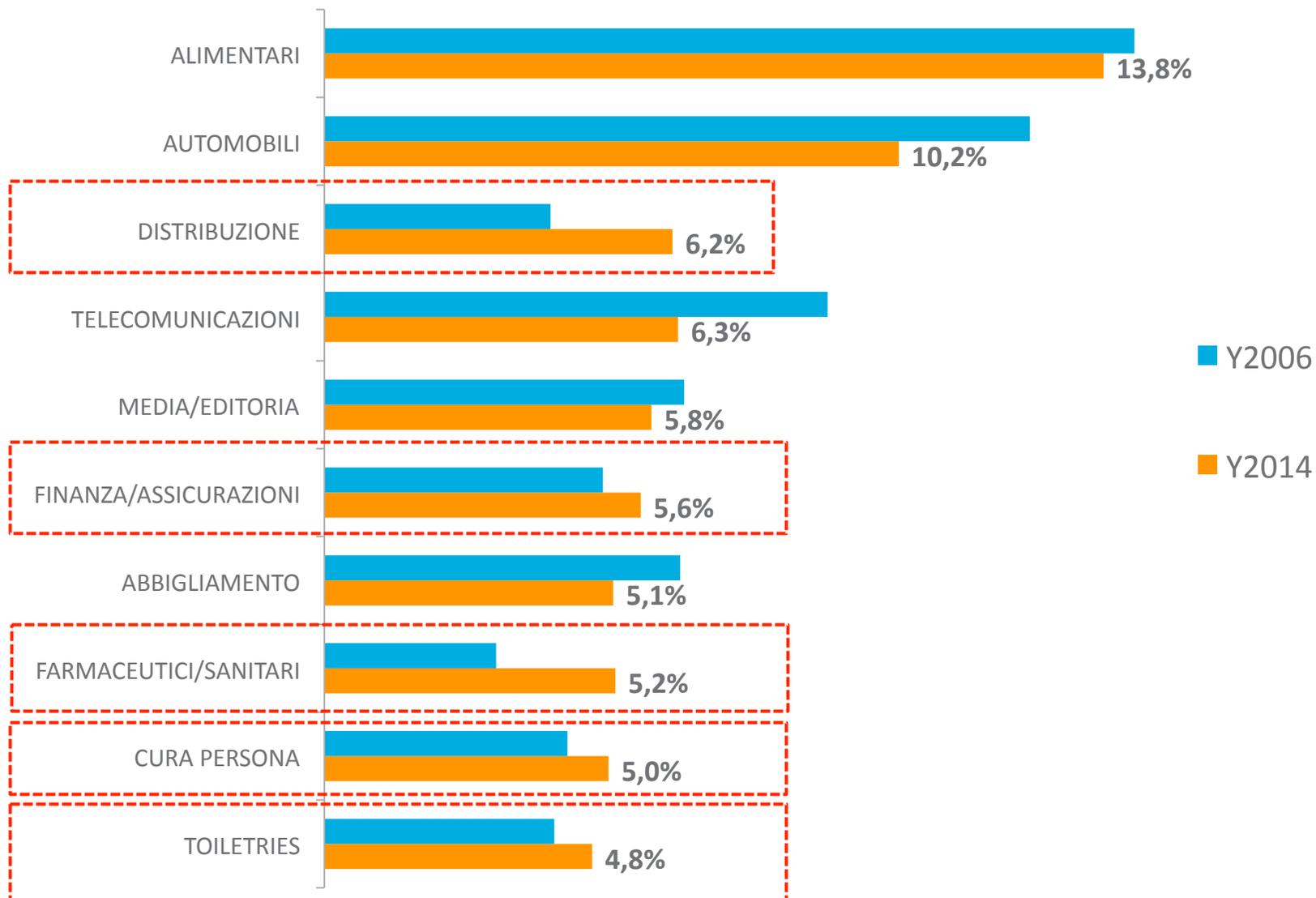


CONFRONTO DI MEDIO PERIODO

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



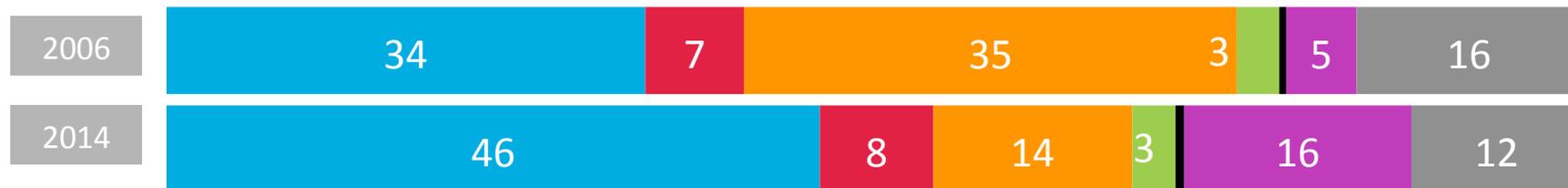
TRA I TOP 10 SETTORI 5 AUMENTANO LA LORO QUOTA



IL MEDIA MIX DEI SETTORI CHE AUMENTANO LA LORO QUOTA

Valori percentuali

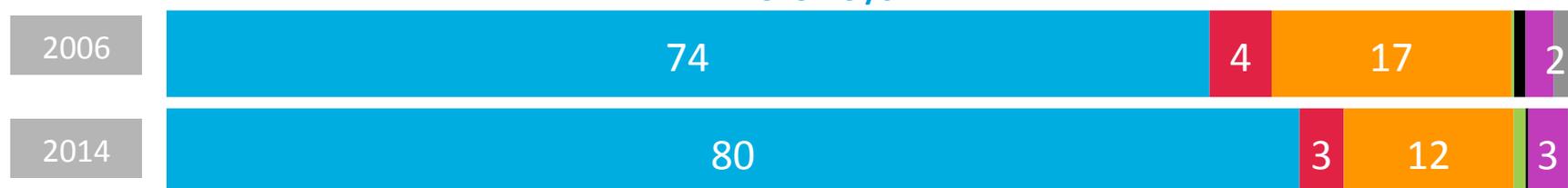
FINANZA/ASSICURAZIONI



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

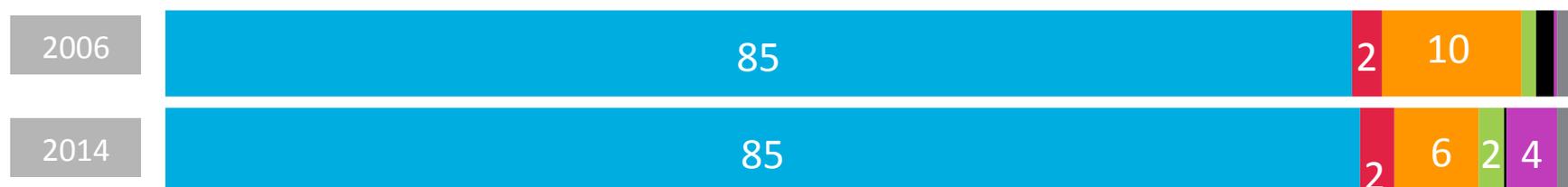
TELECOMUNICAZIONI



AUTOMOBILI



ALIMENTARI

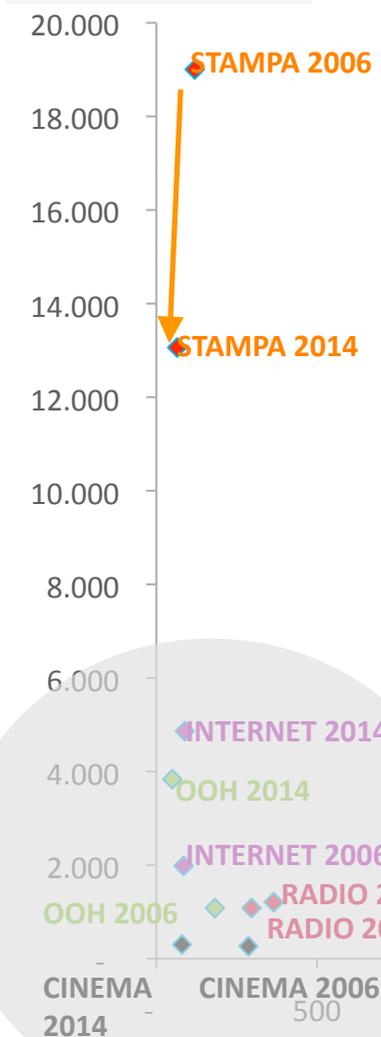


0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

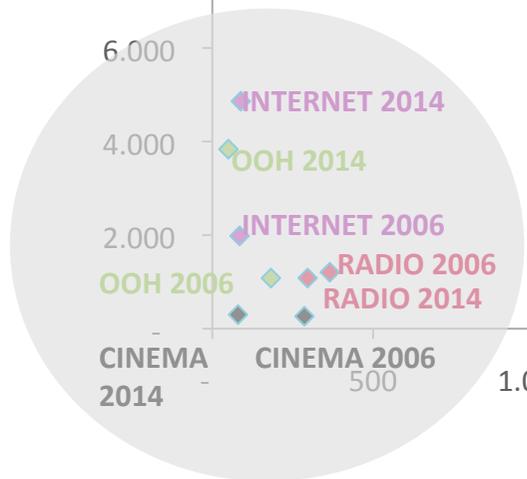
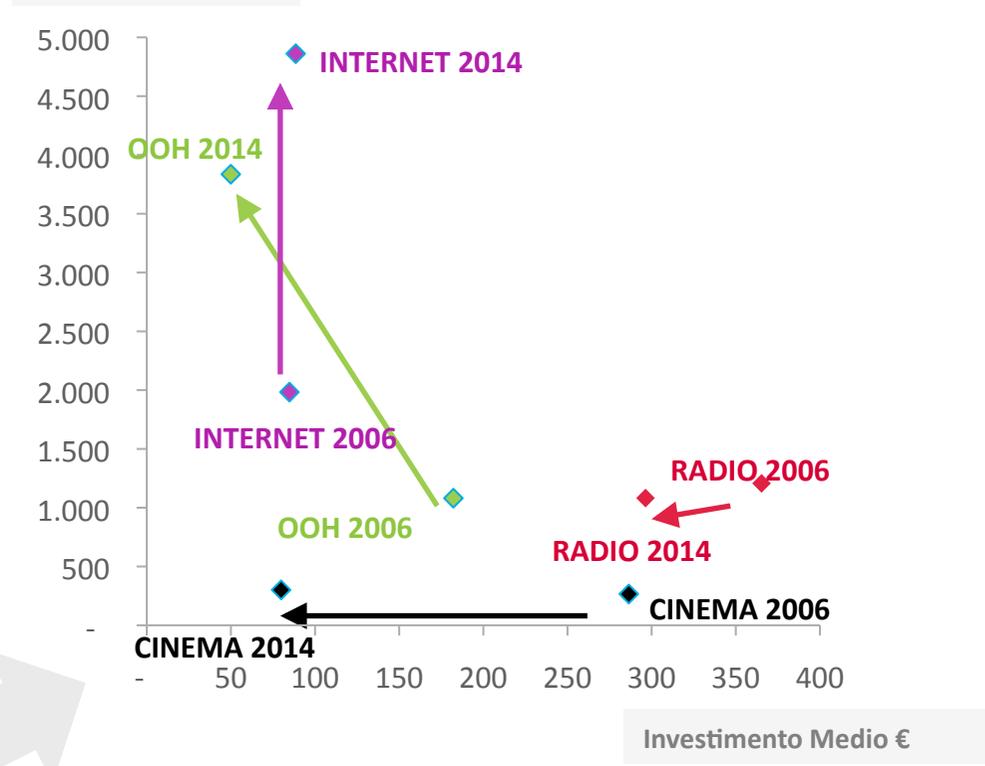
■ Television ■ Radio ■ Stampa ■ OutOfHome ■ Cinema ■ Internet ■ Direct Mail

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

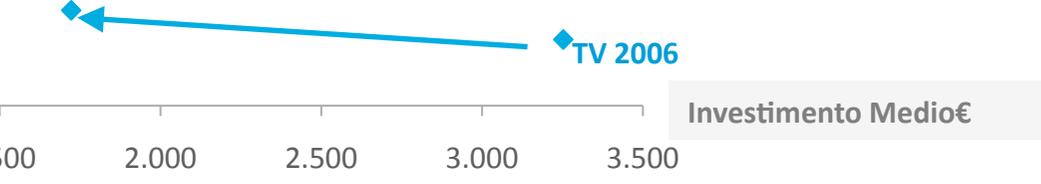
Numero Aziende



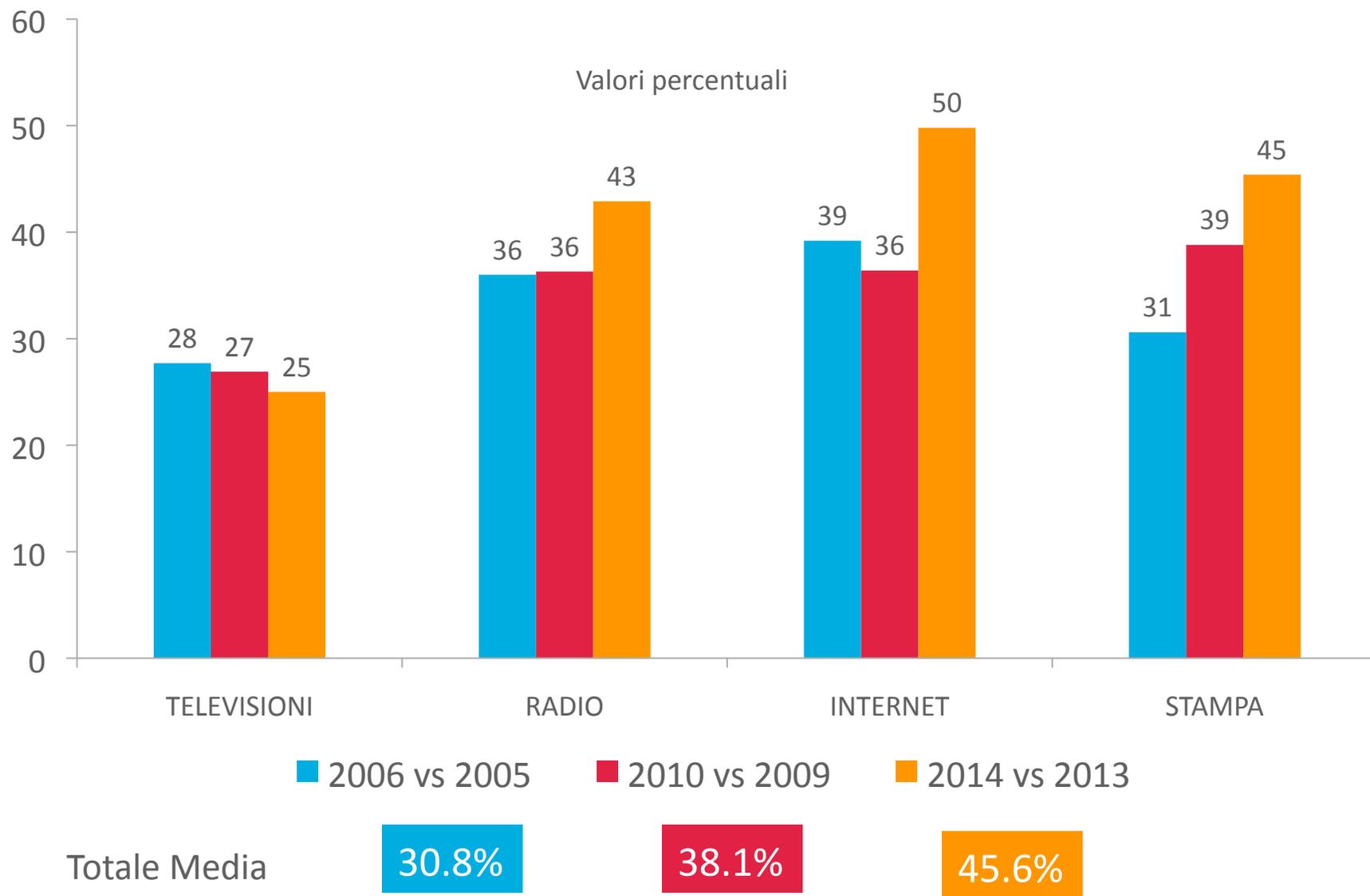
Numero Aziende



TV 2014



IL TASSO DI ROTAZIONE DELLE AZIENDE NEGLI ANNI



I MACROSETTORI E I MEZZI: L'EVOLUZIONE

Largo Consumo



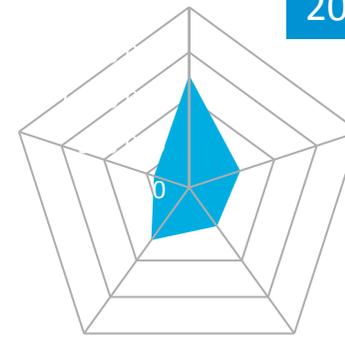
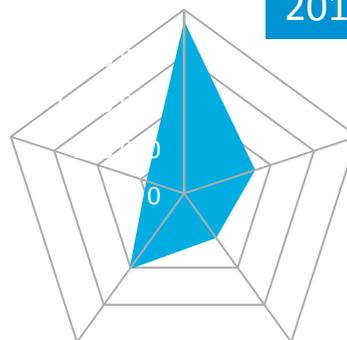
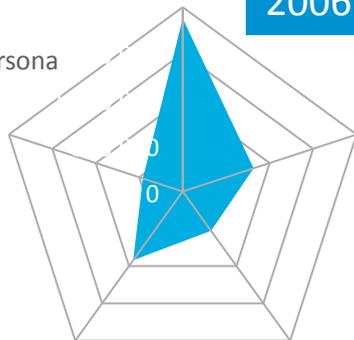
Investimenti pubblicitari a valore

2006

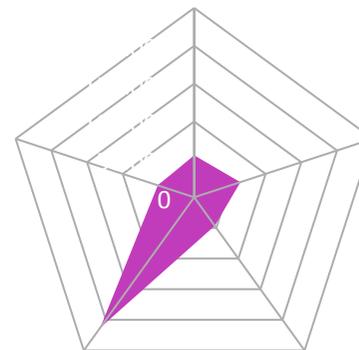
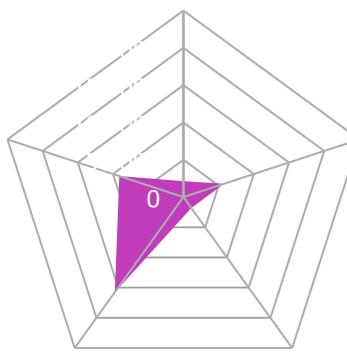
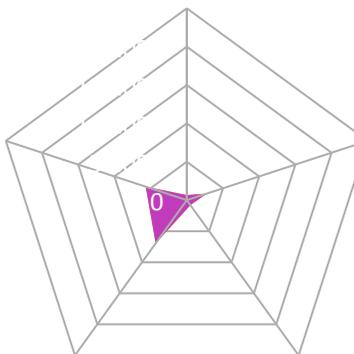
2010

2014

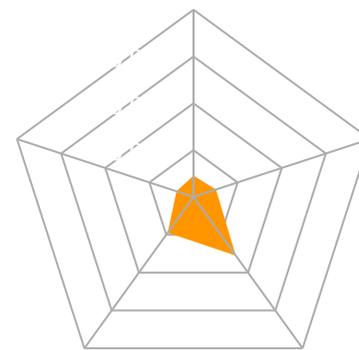
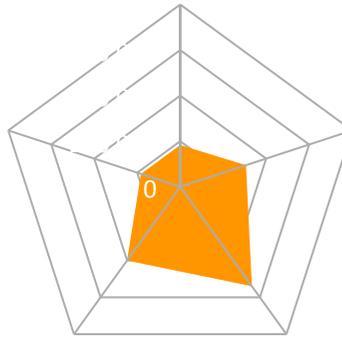
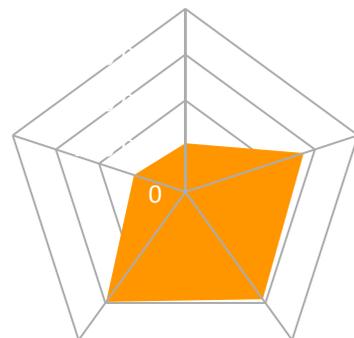
TV



INTERNET



STAMPA



GRAZIE

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.....

AN UNCOMMON SENSE
OF THE CONSUMER™

