

AdvertisingAge's

20th Annual

GLOBAL

MARKETERS

**crain**

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# Top 100's measured media outlay hits \$98 billion globally

P&G leads all marketers; China pushes up Asia gains; personal care category increases 7.8%

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THE WORLD'S Top 100 marketers generated a collective \$98.27 billion in global media in 2005, capturing a quarter of the world's media pie as the group's expenditures hit a modest 4.5% growth, according to the 20<sup>th</sup> annual Global Marketers report.

Procter & Gamble Co. again finished No. 1, at \$8.19 billion, its media spending almost double that of runner-up Unilever, at \$4.27 billion, whose 21.9% rise pushed it past last year's No. 2 General Motors Corp., at \$4.17 billion.

The totals for these marketers are in large part gross media expenditures without the discounts applied to most media, and represent spending collected by *Advertising Age* from media-tracking services from 84 countries. For a marketer to qualify for the global Top 100, it must

have ad spending on three continents, and in this report, reach a spending level of \$274.1 million, the amount recorded by No. 100 Joh. A. Benckiser (Coty).

P&G set the spending tone for the group by applying the skids to its media budget, paring it to 2.6% growth from 17.6% in 2004, the latter representing a first-year fusion of ad spending from P&G and its acquisition Gillette Co. Advertising in the second year of such mergers typically cools off as non-core brands are sold and economies of scale achieved.

Overall, the Top 100's pace dipped dramatically from the set's 2004 growth mark of 12.1%. The group also fell slightly under the 5.1% growth in media spending recorded worldwide by ZenithOptimedia for 2005. The media specialist company counted global media spending in 2005 at \$401.53 billion vs. \$382.1 billion in the previous year; the media operation collects information for all marketers' media investments.

The drop-off was predictable, since 2005 lacked the big ad generators of an Olympics, a European football champi-

See Top 100 on Page 3

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# Top 100

From Page 2

onship and a major U.S. election—all present in 2004. The sporting events, besides attracting these Top 100 marketers, also drive up media prices by tightening the supply of inventory.

Additionally, all Top 100 global marketer charts reflect ad dynamics in the U.S. for obvious reasons. This year there were 46 fully U.S.-based companies on the list, and these marketers have a propensity to spend more freely in the States.

In 2005, the Top 100 spent \$47.46 billion, or 48.2% of its global total, in U.S. media; that's down from 49.9% in 2004. Europe attracted \$30.17 billion from the group, or 30.7% of the total, and Asia, powered by China where media spending grew about 39% year-to-year, gleaned \$15.57 billion, or 15.8% of the total.

Among the five dominant ad categories, only Top 100 spending in personal care showed resiliency. The category, which claimed nine of the Top 100 (marketers are slotted into categories that reflect their most-advertised segment), hit \$19.49 billion in spending, up 7.8%—growth propped up by Unilever's 21.9% and No. 44 Colgate-Palmolive's 22.9% boost in spending.

Automotive, the largest category at \$22.76 billion in spending from 17 marketers, grew only 2.3% in media outlays, a sign of the global slowdown. Global vehicle unit sales grew only 3.7% to 64.7 million in 2005, down from 5.9% growth in 2004. The U.S. portion advanced only 0.9% to 17.5 million units vs. 2% growth in 2004.

Entertainment & media, attracting \$11.03 billion in spending, advanced only 1.1%. The category's 10 marketers, largely U.S.-based, were victims of a 5.8% decline in U.S. box-office receipts. U.S.-only spending declined 29.4% in 2005 at No. 12 Walt Disney Co.'s Buena Vista unit, and an aggregate 12.9% at No. 31 Viacom's Paramount and DreamWorks SKG studios.

Food, pulling \$8.13 billion in spending from eight marketers, grew only 1.5%, representing a range from 6.3% growth at No. 37 Kellogg Co. to an 11.6% decline in spending at No. 53 General Mills.

The Top 100 is poised to break the \$100 billion barrier this year. One indication it is on track is the aggregate 6.2% growth in revenue through the first three quarters of 2006 recorded by the world's top five advertising holding companies whose agencies handle the accounts of most of the Top 100.

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# TOP 100 GLOBAL MARKETERS

Ranked by total worldwide measured ad spending from Nielsen Media Research, TNS Media Intelligence, Ibope, Parc & others

RANK		ADVERTISER	HEADQUARTERS	WORLDWIDE ADVERTISING SPENDING			U.S. MEASURED MEDIA SPENDING			SPENDING BY LEADING REGION IN 2005*		
2005	2004			2005	2004	% CHG	2005	2004	% CHG	ASIA	EUROPE	LATIN AMERICA
1	1	Procter & Gamble Co.	Cincinnati	\$8,190	\$7,982	2.6	\$3,410	\$3,535	-3.5	\$1,743	\$2,553	\$216
2	3	Unilever	London/Rotterdam	4,272	3,504	21.9	761	573	32.7	1,048	2,107	227
3	2	General Motors Corp.	Detroit	4,173	3,854	8.3	3,004	2,805	7.1	138	800	92
4	6	Toyota Motor Corp.	Toyota City, Japan	2,800	2,589	8.1	1,076	1,107	-2.8	1,096	511	19
5	5	L'Oreal	Clichy, France	2,773	2,608	6.3	794	769	3.2	236	1,633	35
6	4	Ford Motor Co.	Dearborn, Mich.	2,645	2,624	0.8	1,583	1,574	0.6	108	801	69
7	7	Time Warner	New York	2,479	2,504	-1.0	2,061	2,008	2.7	91	272	20
8	8	DaimlerChrysler	Auburn Hills, Mich./Stuttgart, Germany	2,104	2,343	-10.2	1,590	1,826	-12.9	46	375	32
9	11	Nestle	Vevey, Switzerland	2,033	1,967	3.3	561	524	7.1	274	1,048	105
10	10	Johnson & Johnson	New Brunswick, N.J.	1,968	1,971	-0.1	1,386	1,408	-1.5	190	324	17
11	13	Honda Motor Co.	Tokyo	1,854	1,644	12.7	861	794	8.4	781	159	13
12	9	Walt Disney Co.	Burbank, Calif.	1,813	1,984	-8.6	1,413	1,493	-5.4	117	245	1
13	12	Nissan Motor Co.	Tokyo	1,778	1,861	-4.5	1,023	1,108	-7.6	488	173	30
14	16	Coca-Cola Co.	Atlanta	1,752	1,526	14.8	471	414	13.8	421	660	119
15	14	Altria Group	New York	1,690	1,643	2.8	1,189	1,095	8.5	43	404	11
16	20	PepsiCo	Purchase, N.Y.	1,644	1,332	23.5	1,129	911	24.0	150	210	91
17	21	GlaxoSmithKline	Brentford, Middlesex, U.K.	1,610	1,286	25.2	1,163	891	30.4	102	282	33
18	15	Sony Corp.	Tokyo	1,607	1,576	2.0	996	936	6.4	259	275	11
19	17	McDonald's Corp.	Oak Brook, Ill.	1,554	1,469	5.8	765	704	8.5	312	394	27
20	18	Volkswagen	Wolfsburg, Germany	1,547	1,430	8.2	425	423	0.3	29	1,009	48
21	22	Reckitt Benckiser	Slough, Berkshire, U.K.	1,408	1,279	10.1	256	314	-18.3	140	948	24
22	30	Vodafone Group	Newbury, U.K.	1,329	945	40.6	0	0	-89.3	538	774	0
23	26	Deutsche Telekom	Bonn, Germany	1,319	1,038	27.0	526	458	15.0	0	793	0
24	23	Danone Group	Paris	1,291	1,245	3.8	80	102	-21.1	10	1,123	56
25	24	General Electric Co.	Fairfield, Conn.	1,282	1,126	13.9	1,131	997	13.4	17	98	0
26	19	Pfizer	New York	1,148	1,353	-15.2	883	1,057	-16.5	46	156	33
27	29	News Corp.	New York	1,121	951	17.9	881	774	13.9	46	166	0
28	31	Dell	Round Rock, Texas	1,090	918	18.7	776	630	23.1	159	140	0
29	27	Yum Brands	Louisville, Ky.	1,083	998	8.5	725	684	5.9	218	52	22
30	28	PSA Peugeot Citroen	Paris	1,019	961	6.0	0	0	NA	16	961	26
31	25	Viacom	New York	1,010	1,050	-3.8	898	949	-5.4	12	52	0
32	33	Mars Inc.	McLean, Va.	939	900	4.3	346	428	-19.3	52	500	18
33	32	Matsushita Electric Industrial Co.	Kadoma, Japan	909	904	0.6	97	95	1.9	769	27	0

Note: Figures are in millions of U.S. dollars and are AA estimates. 2004 rankings are based on data collected in 2006. Measured media in the U.S. include magazines, Sunday magazines, newspapers, national newspapers, outdoor, spot TV, network TV, syndicated TV, cable TV networks, local radio, network radio, national spot radio, Spanish-language media and Internet from TNS Media Intelligence and Yellow Pages from Yellow Pages Association, found in the 100 Leading National Advertisers Special Report (AA, June 26, 2006). Outside the U.S. sources vary and are presented with each country chart beginning on Page 8. \*Media spending in Canada, the Middle East and Africa are not broken out, but are included in advertiser totals.

# TOP 100 GLOBAL MARKETERS

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RANK		ADVERTISER	HEADQUARTERS	WORLDWIDE ADVERTISING SPENDING			U.S. MEASURED MEDIA SPENDING			SPENDING BY LEADING REGION IN 2005*		
2005	2004			2005	2004	% CHG	2005	2004	% CHG	ASIA	EUROPE	LATIN AMERICA
34	37	Tchibo Holding	Hamburg	\$831	\$785	5.8	\$77	\$92	-16.5	\$39	\$679	\$14
35	43	Hyundai Motor Co.	Seoul	829	710	16.7	425	378	12.5	155	158	16
36	35	Renault	Boulogne-Billancourt, France	825	828	-0.4	0	0	NA	29	763	22
37	39	Kellogg Co.	Battle Creek, Mich.	816	768	6.3	470	447	5.0	71	203	36
38	42	Microsoft Corp.	Redmond, Wash.	810	719	12.6	463	486	-4.6	163	161	0
39	34	Hewlett-Packard Co.	Palo Alto, Calif.	777	836	-7.1	508	557	-8.7	78	159	8
40	44	Vivendi	Paris	739	702	5.2	88	78	13.4	29	566	0
41	40	Kao Corp.	Tokyo	728	757	-3.9	152	137	11.5	560	10	0
42	41	Wal-Mart Stores	Bentonville, Ark.	712	733	-2.9	584	603	-3.2	0	78	9
43	36	Canon	Tokyo	707	822	-14.1	131	157	-16.5	504	62	0
44	53	Colgate-Palmolive Co.	New York	699	568	22.9	124	129	-3.9	214	243	96
45	61	American Express Co.	New York	694	487	42.5	602	421	43.0	22	56	0
46	48	SC Johnson	Racine, Wis.	693	656	5.6	409	427	-4.2	25	194	44
47	46	Citigroup	New York	693	697	-0.6	623	616	1.1	25	23	21
48	38	Novartis	Basel, Switzerland	685	774	-11.5	523	638	-18.0	10	132	9
49	51	Henkel	Duesseldorf, Germany	668	586	13.9	55	55	0.1	16	590	0
50	49	Samsung Group	Seoul	662	628	5.4	135	133	1.9	358	142	0
51	50	American International Group	New York	659	605	9.0	82	59	39.5	578	0	0
52	52	Anheuser-Busch Cos.	St. Louis	633	575	10.0	607	547	10.9	1	16	9
53	45	General Mills	Minneapolis	619	700	-11.6	581	634	-8.4	9	14	0
54	47	Mazda Motor Corp.	Hiroshima, Japan	602	685	-12.1	209	295	-29.1	243	121	8
55	54	Cadbury Schweppes	London	574	536	7.2	304	268	13.4	68	151	24
56	56	Ferrero	Alba, Italy	557	527	5.6	19	26	-27.1	15	517	0
57	59	Wm. Wrigley Jr. Co.	Chicago	552	490	12.6	201	170	18.0	82	258	0
58	75	Bayer	Leverkusen, Germany	541	413	30.9	314	263	19.5	18	173	28
59	58	Clorox Co.	Oakland, Calif.	525	492	6.6	486	451	7.7	15	0	15
60	85	Nokia Corp.	Espoo, Finland	511	365	39.8	70	100	-30.0	134	253	10
61	55	Wyeth	Madison, N.J.	508	535	-5.1	384	414	-7.4	40	51	7
62	57	MasterCard	Purchase, N.Y.	489	494	-1.1	336	341	-1.6	32	84	26
63	64	Kimberly-Clark Corp.	Irving, Texas	483	464	4.0	295	273	8.1	66	61	33
64	77	Suzuki Motor Corp.	Hamamatsu, Japan	480	397	21.1	107	77	39.7	233	119	7
65	67	Visa International	San Francisco	464	453	2.4	360	363	-0.9	37	30	18
66	70	Telefonica	Madrid	456	429	6.3	4	18	-78.4	0	357	95
67	62	Kia Motors Corp.	Seoul	456	475	-4.0	218	252	-13.7	80	129	0

Note: Figures are in millions of U.S. dollars and are AA estimates. 2004 rankings are based on data collected in 2006. See Page 4 for more notes and Page 7 for methodology.

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2005	2004			2005	2004	% CHG	2005	2004	% CHG	ASIA	EUROPE	LATIN AMERICA
68	63	BMW	Munich, Germany	\$443	\$471	-5.9	\$157	\$175	-10.5	\$25	\$239	0
69	68	SABMiller	London	441	447	-1.4	294	326	-9.7	0	92	\$12
70	60	IBM Corp.	Armonk, N.Y.	429	488	-12.0	297	311	-4.4	20	100	0
71	69	Fuji Heavy Industries	Tokyo	427	446	-4.3	169	168	0.6	218	32	0
72	73	Schering-Plough Corp.	Kenilworth, N.J.	417	416	0.3	392	395	-0.7	5	2	9
73	72	Campbell Soup Co.	Camden, N.J.	399	418	-4.5	324	333	-2.8	24	43	0
74	66	Fiat	Turin, Italy	398	460	-13.6	5	3	100.4	7	339	43
75	76	Mattel	El Segundo, Calif.	394	397	-0.9	184	193	-4.9	17	150	32
76	65	Mitsubishi Motors Corp.	Tokyo	380	462	-17.8	194	270	-28.3	75	67	23
77	74	Diageo	London	378	414	-8.6	165	175	-5.7	35	158	0
78	84	Doctor's Associates	Milford, Conn.	376	367	2.3	326	326	0.1	22	0	7
79	78	LG Group	Seoul	369	396	-6.8	57	62	-8.5	244	49	0
80	71	Bertelsmann	Guetersloh, Germany	364	422	-13.7	55	66	-16.5	0	309	0
81	79	Sharp Corp.	Osaka, Japan	344	390	-11.9	44	42	5.2	281	15	0
82	82	Sara Lee Corp.	Chicago	342	369	-7.3	197	209	-5.7	13	128	0
83	92	LVMH Moet Hennessy Louis Vuitton	Paris	340	304	11.6	151	132	14.5	23	165	0
84	80	Burger King Corp.	Miami	337	386	-12.9	269	323	-16.8	1	55	0
85	81	Heineken	Amsterdam	332	372	-10.6	106	93	13.9	6	213	0
86	83	Carrefour	Paris	328	368	-11.1	0	0	-100.0	17	283	25
87	88	Sanofi-Aventis	Paris	315	338	-6.9	275	271	1.2	1	39	0
88	96	Sony BMG Music Entertainment	New York	313	278	12.7	78	72	8.1	29	197	1
89	99	Nintendo Co.	Kyoto, Japan	309	264	16.8	81	90	-10.4	177	48	0
90	90	InBev	Leuven, Belgium	308	318	-2.9	54	62	-14.0	6	178	29
91	93	Philips Electronics	Amsterdam	301	295	2.1	142	148	-4.2	20	123	10
92	91	United International Pictures	London	300	311	-3.7	0	0	NA	111	188	0
93	95	Estee Lauder Cos.	New York	293	279	5.0	177	172	3.1	17	95	0
94	97	Molson Coors Brewing Co.	Denver/Montreal	292	271	7.9	200	188	6.6	0	32	14
95	103	Hitachi	Tokyo	291	241	20.8	33	31	7.5	257	1	0
96	87	Expedia	Bellevue, Wash.	286	354	-19.1	224	296	-24.2	0	49	0
97	89	Nike	Beaverton, Ore.	283	319	-11.1	201	223	-9.9	7	68	0
98	98	Shiseido Co.	Tokyo	282	267	5.5	6	6	13.3	254	16	0
99	86	Merck & Co.	Whitehouse Station, N.J.	278	361	-23.0	269	351	-23.2	1	1	7
100	94	Joh. A. Benckiser (Coty)	Ludwigshafen, Germany/New York	274	286	-4.1	131	125	4.7	7	130	0

Note: Figures are in millions of U.S. dollars and are AA estimates. 2004 rankings are based on data collected in 2006. See Page 4 for more notes and Page 7 for methodology.

## AD SPENDING BY CATEGORY

By measured media bought in 2005 and 2004

CATEGORY	MEASURED ADVERTISING EXPENDITURES				ADVERTISER COUNT
	2005	2004	% CHG	% TOTAL	
Automotive	\$22,761	\$22,242	2.3	23.2	17
Personal care	19,491	18,086	7.8	19.8	11
Entertainment & media	11,029	10,903	1.1	11.2	10
Food	8,129	8,010	1.5	8.3	8
Drugs	7,470	7,448	0.3	7.6	9
Soft drinks	3,971	3,394	17.0	4.0	3
Restaurants	3,349	3,221	4.0	3.4	4
Computers	3,106	2,962	4.9	3.2	4
Telephone	3,104	2,412	28.7	3.2	3
Financial	3,000	2,737	9.6	3.1	5
Cleaners	2,626	2,428	8.2	2.7	3
Beer, wine & liquor	2,384	2,396	-0.5	2.4	6
Electronics & imaging	2,278	2,355	-3.3	2.3	3
Retail	2,176	2,125	2.4	2.2	5
Electronics	1,306	1,322	-1.3	1.3	4
Candy	1,109	1,018	9.0	1.1	2
Toys	703	662	6.2	0.7	2
Athletic apparel	283	319	-11.1	0.3	1

Figures are U.S. dollars in millions and represent the top 100 only. All figures are considered AA estimates.

## AD SPENDING BY REGION

By measured media bought in 2005 and 2004

REGION	MEASURED ADVERTISING EXPENDITURES			
	2005	2004	% CHG	% OF TOTAL
Africa	\$687	\$552	24.5	0.7
Asia	15,568	14,351	8.5	15.8
Europe	30,178	28,242	6.9	30.7
Latin America	2,163	1,926	12.3	2.2
Middle East	366	273	33.9	0.4
Canada	1,848	1,765	4.7	1.9
United States	47,462	46,929	1.1	48.3
Worldwide	98,273	94,038	4.5	100.0

Figures are U.S. dollars in millions and represent the top 100 only. All figures are considered AA estimates.

## METHODOLOGY

THE MARKETERS who ultimately became the Top 100 were collated from media lists from 84 countries provided by monitoring services, primarily Nielsen Media Research, TNS Media Intelligence and Ibope, Parc and Sigma Conseil. Other independent companies also supplied data.

McCann Worldgroup and JWT also contributed to the report.

Media lists per country were by gross ad rates. *Advertising Age* adjusted some market's gross media expenditures to reflect that market's global media volume ranking from ZenithOptimedia.

A Top 100 marketer had to have media spending on at least three continents to qualify as "global." Twenty-five marketers spent more than No. 100 Joh. A Benckiser, but lacked the "global" requirement.

Five of the non-qualifiers were telecom companies: Verizon Communications, AT&T Corp., Sprint Nextel Corp., France Telecom and Tokyo-based KDDI Corp. Nine were retailers: Federated Department Stores; Sears Holdings Corp.; Home Depot; Lidl & Schwarz Stiftung & Co., Neckarsulm, German; Metro Group,

Duesseldorf; Best Buy Co., Casas Bahia, Sao Caetano do Sul, Brazil; Aeon Co., Chiba, Japan; and Association Familiale Mulliez, Villeneuve d'Ascq, France. Japanese companies Suntory, Osaka, and Kirin Brewery Co. and Asahi Breweries, both Tokyo, had the spending but lacked global coverage.

As it was, Germany had nine headquarters, France and the U.K. each had eight among Top 100 marketers. Japan was home base for 15 and the U.S. for 46.

Because *Ad Age* treats exchange rates on an historic basis, exchange rate mechanics nudged down spending outside the U.S. because of the rising dollar. Europe media tallies were abetted by a 0.9% decline in the euro and an 1.4% drop in the British pound versus the dollar. Asia-Pacific was affected by the yen's 3.1% decline against the dollar.

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## AFRICA

### Algeria

Sigma Conseil

ADVERTISER	2005	2004	%CHG
Orascom Telecom Holding	\$21.1	\$9.5	122.1
Wataniya Telecom	6.7	5.0	34.0
Algerie Telecom	5.2	3.9	33.3
Danone Group	3.9	2.1	85.7
Procter & Gamble Co.	1.7	2.0	-15.0
PSA Peugeot Citroen	1.7	1.5	13.3
Henkel	1.6	1.3	23.1
Hyundai Motor Co.	1.5	1.1	36.4
Renault	1.4	0.6	133.3
Unilever	1.2	0.4	200.0

Figures are U.S. dollars in millions.

### Ghana

Steadman Group

ADVERTISER	2005	2004	%CHG
Unilever	\$1.2	\$0.8	43.1
Diageo	1.1	1.0	13.5
Scancom Ghana	0.9	0.7	45.3
Millicom International Cellular	0.8	0.5	50.7
Kinapharma	0.8	0.6	42.0
Primex Ghana	0.6	0.2	304.5
Nestle	0.6	0.5	9.3
Kasapa Telecom	0.5	0.1	233.6
GT Fixed Line & Networks	0.4	0.2	106.8
Fan Milk	0.4	0.2	120.2

Figures are U.S. dollars in millions.

### Kenya

Steadman Group

ADVERTISER	2005	2004	%CHG
Telkom Kenya	\$4.7	\$3.9	21.8
Celstel International	4.5	2.5	85.0
Population Service International	4.3	4.5	-3.8
Unilever	4.2	4.0	6.2
East African Breweries	3.6	1.7	117.9
Reckitt Benckiser	3.1	2.1	49.5
GlaxoSmithKline	2.3	1.8	28.6
Kapa Oil Kenya	1.8	1.3	32.1
Grey International	1.7	NA	NA
Nakumatt Supermarkets	1.7	0.6	174.6

Figures are U.S. dollars in millions.

### Morocco

Sigma Conseil

ADVERTISER	2005	2004	%CHG
Vivendi	\$50.0	\$36.1	38.5
Medi Telecom	21.4	15.6	37.2
Procter & Gamble Co.	12.0	12.6	-4.8
Unilever	7.2	9.2	-21.7
Lesieur Cristal	6.6	7.0	-5.7
Loterie Nationale	5.2	6.7	-22.4
Ctre. Nat. de La Prév. contre les Accidents	4.7	3.6	30.6
Danone Group	4.6	4.1	12.2
Coca-Cola Co.	4.4	5.2	-15.4
Unibel	3.9	3.7	5.4

Figures are U.S. dollars in millions.

### Nigeria

Media Monitoring Report via JWT

ADVERTISER	2005	2004	%CHG
MTN Group	\$9.4	NA	NA
Heineken	7.5	NA	NA
Celstel International	6.8	NA	NA
Globacom	5.6	NA	NA
Unilever	4.5	NA	NA
Diageo	4.5	NA	NA
Coca-Cola Co.	4.5	NA	NA
PZ Cussons	3.8	NA	NA
Nestle	3.4	NA	NA
Procter & Gamble Co.	2.7	NA	NA

Figures are U.S. dollars in millions.

### South Africa

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
South African Broadcasting Corp.	\$123.6	\$68.3	80.9
E.tv	111.0	110.5	0.5
Naspers	95.1	86.1	10.5
Unilever	71.5	58.2	22.7
MTN Group	59.0	45.4	29.9
Vodacom	54.0	38.6	40.0
SABMiller	40.8	33.6	21.2
Pick 'n Pay	39.6	35.2	12.6
Shoprite Holdings	39.2	36.7	6.8
First Rand Bank	36.7	25.0	47.2

Figures are U.S. dollars in millions.

### Tanzania

Steadman Group

ADVERTISER	2005	2004	%CHG
Celstel International	\$2.8	\$3.4	-17.6
Vodacom	2.1	2.7	-22.9
Sabuni Detergent	2.0	0.6	241.2
Kwanza Cocke	1.8	NA	NA
Tanzania Breweries	1.5	1.1	40.4
Population Service International	1.3	2.4	-45.6
Millicom International Cellular	1.0	0.9	11.1
MAC Group	0.7	0.4	89.1
Unilever	0.6	0.3	113.0
SBC Tanzania	0.5	NA	NA

Figures are U.S. dollars in millions.

### Tunisia

Sigma Conseil

ADVERTISER	2005	2004	%CHG
Orascom Telecom Holding	\$4.9	\$3.2	53.1
Tunisie Telecom	2.6	1.6	62.5
Coca-Cola Co.	2.6	1.4	85.7
Danone Group	2.6	1.8	44.4
Sotubi	2.5	1.4	78.6
Henkel	1.8	1.1	63.6
Sotuchoc	1.7	0.6	183.3
Group Jasminal	1.3	0.8	62.5
Agromed-Mamie Nova	1.1	0.4	175.0
Unilever	1.0	0.6	66.7

Figures are U.S. dollars in millions.

### Uganda

Steadman Group

ADVERTISER	2005	2004	%CHG
MTN Group	\$3.9	\$3.1	23.9
Mobil Telecommunications Co.	2.5	1.6	60.0
East African Breweries	2.2	1.4	61.3
Uganda Telecom	1.4	1.6	-9.3
SABMiller	1.2	1.5	-21.4
Crown Bottlers	1.0	0.8	12.6
Century Bottling	0.9	0.6	44.0
Government of Uganda	0.9	1.1	-19.8
Unilever	0.6	0.7	-13.6
Mukwano Industries	0.6	0.5	26.8

Figures are U.S. dollars in millions.

## ASIA & PACIFIC

### Australia

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Coles Myer	\$260.9	\$251.4	3.8
Harvey Norman Holdings	123.8	107.4	15.3
Woolworths	111.3	120.4	-7.6
Government of Australia	107.1	60.1	78.3
Telstra Corp.	94.3	111.6	-15.5
General Motors Corp.	88.7	74.1	19.7
Toyota Motor Corp.	84.1	77.2	9.0
Procter & Gamble Co.	81.0	78.7	2.9
Singapore Telecommunications	69.0	58.8	17.4
Ford Motor Co.	65.6	58.3	12.5

Figures are U.S. dollars in millions.

### China

CTR Media Intelligence (TNS)

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$890.8	\$707.3	25.9
Hayao Group	382.3	317.6	20.4
Unilever	212.6	124.1	71.3
Stone Group Holdings	154.1	124.7	23.6
Colgate-Palmolive Co.	114.8	61.7	86.1
China Mobile Communications Corp.	114.6	89.4	28.2
Yum Brands	75.6	54.6	38.4
L'Oreal	75.4	52.7	43.1
Lafang Group	70.5	53.6	31.4
Arche Group	66.9	93.6	-28.5

Figures are U.S. dollars in millions, discounted by AA. Nielsen also monitors China.

### Hong Kong

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$61.6	\$69.1	-10.9
Cheung Kong Holdings	45.0	40.7	10.6
HSBC Holdings	28.3	24.9	13.6
Sun Hung Kai & Co.	24.7	19.1	29.1
McDonald's Corp.	17.3	17.5	-1.2
Jardine Matheson Holdings	17.2	23.3	-26.2
Pacific Century Group	16.1	16.4	-1.7
Johnson & Johnson	14.8	13.7	7.8
Aji Ichiban Co.	14.4	10.8	33.1
Midland Holdings	14.0	4.5	211.6

Figures are U.S. dollars in millions, discounted by AA.

### India

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Unilever	\$142.8	\$132.0	8.2
Procter & Gamble Co.	60.8	51.8	17.5
Tata Group	52.0	30.9	68.5
Paras Pharmaceuticals	40.6	29.6	37.1
PepsiCo	35.9	24.2	48.3
Reckitt Benckiser	34.6	25.7	34.4
Dabur India	31.9	25.2	26.9
Nokia Corp.	24.0	12.8	87.8
Johnson & Johnson	23.3	14.4	62.2
L'Oreal	21.6	9.9	118.4

Figures are U.S. dollars in millions, discounted by AA.

### Indonesia

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Unilever	\$157.9	\$155.4	1.7
Metro TV	47.3	45.6	3.7
Rajawali Citra Televisi	43.8	33.0	32.6
Televisi Pendidikan Indonesia	37.5	35.2	6.7
Global TV	36.5	4.1	782.8
Surya Citra Televisi	34.5	39.9	-13.3
Wings Corp.	33.6	38.1	-11.7
Indosiar Visual Mandiri	33.6	34.9	-3.7
Cakrawala Andalas Televisi	30.7	32.2	-4.8
Duta Visual Nusantara TV7	28.6	25.5	11.8

Figures are U.S. dollars in millions, discounted by AA.

### Japan

Nikkei Adv. Research Inst. and Universal McCann

ADVERTISER	2005	2004	%CHG
Toyota Motor Corp.	\$929.2	\$760.4	22.2
Matsumita Electric Industrial Co.	715.3	680.0	5.2
Honda Motor Co.	678.3	565.7	19.9
American International Group	516.8	511.0	1.2
Kao Corp.	510.2	555.1	-8.1
Vodafone Group	478.4	210.1	127.7
Kirin Brewery Co.	463.3	480.1	-3.5
Canon	462.5	520.3	-11.1
Nissan Motor Co.	426.4	427.3	-0.2
Procter & Gamble Co.	370.3	407.4	-9.1

Figures are U.S. dollars in millions.

### Malaysia

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Telekom Malaysia	\$51.4	\$40.4	27.3
Procter & Gamble Co.	35.3	28.2	24.9
Maxis Communications	26.0	38.0	-31.7
Telenor	21.4	21.2	1.0
Unilever	21.1	16.7	26.2
Nestle	16.1	15.4	4.9
Yum Brands	11.6	10.7	7.9
Petronas	9.7	9.2	5.0
Sony Corp.	9.2	8.8	5.2
Malaysia Airlines	8.0	9.3	-14.2

Figures are U.S. dollars in millions.

### New Zealand

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Telecom Corp. of New Zealand	\$48.2	\$35.9	34.3
Foodstuffs	37.6	30.6	22.7
Warehouse Group	26.3	24.6	7.2
Progressive Enterprises	25.2	22.9	9.8
Vodafone Group	24.7	21.7	14.1
Harvey Norman Holdings	23.1	20.5	12.4
New Zealand Lotteries Commission	22.2	16.6	33.2
L'Oreal	22.0	17.9	22.5
Government of New Zealand	19.2	10.8	77.6
Unilever	18.5	15.1	23.2

Figures are U.S. dollars in millions.

### Pakistan

Gallup Pakistan

ADVERTISER	2005	2004	%CHG
Unilever	\$11.6	NA	NA
Pakistan Telecommunication Co.	6.2	NA	NA
Procter & Gamble Co.	5.5	NA	NA
Jang Group	5.4	NA	NA
Hilal Confectioneries	4.6	NA	NA
Orascom Telecom Holding	4.4	NA	NA
PepsiCo	4.1	NA	NA
Telenor	3.5	NA	NA
Millicom International Cellular	2.9	NA	NA
Colgate-Palmolive Co.	2.7	NA	NA

Figures are U.S. dollars in millions.

### Philippines

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$39.8	\$27.3	45.5
Unilever	30.3	17.8	70.1
Philippine Long Distance Telephone Co.	17.3	12.0	43.5
Colgate-Palmolive Co.	15.6	13.7	14.2
Nestle	14.4	9.6	50.1
Globe Telecom	14.3	14.6	-2.0
San Miguel Corp.	13.7	11.2	22.4
United Laboratories	13.2	10.1	31.3
Johnson & Johnson	9.0	6.9	31.2
Fortune Tobacco Corp.	7.3	6.3	15.8

Figures are U.S. dollars in millions, discounted by AA.

### Singapore

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
MediaCorp	\$31.5	\$26.9	16.9
Procter & Gamble Co.	19.0	22.3	-15.0
StarHub	16.8	20.5	-18.1
Jardine Matheson Holdings	14.3	13.6	5.3
MobileOne	13.7	13.6	1.2
NTUC	13.4	14.8	-9.8
Sony Corp.	12.8	16.0	-19.6
Singapore Telecommunications	12.8	17.6	-27.2
HSBC Holdings	12.2	10.0	21.6
Government of Singapore	12.1	13.1	-7.7

Figures are U.S. dollars in millions.

### South Korea

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Samsung Group	\$267.6	\$253.3	5.6
LG Group	204.0	203.4	0.3
SK Group	147.6	160.9	-8.3
Lotte Group	134.3	138.4	-3.0
KT Corp.	132.3	172.5	-23.3
Hyundai Motor Co.	65.0	56.6	14.7
American International Group	55.6	30.0	85.4
Amore Pacific Corp.	50.1	57.0	-12.1
Kia Motors Corp.	46.3	50.6	-8.4
GS Holdings Corp.	45.0	16.8	167.0

Figures are U.S. dollars in millions. KADD also monitors South Korea.

# GLOBAL MARKETERS: Top 10 Global Marketers by Country

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## Sri Lanka

Nielsen Media Research/ACNielsen\*

ADVERTISER	2005	2004	%CHG
Unilever	\$8.5	\$6.8	24.7
United National Party	6.2	4.2	48.0
Telekom Malaysia	4.3	3.1	39.6
Sri Lanka Insurance Corp.	3.8	1.8	118.8
Suntel	3.7	0.0	NA
Abans	3.7	2.1	74.8
Nestle	3.4	3.2	7.8
Lanka Bell	3.3	0.0	NA
Sri Lanka Telecom	3.2	3.7	-13.6
Ceylinc Insurance Co.	2.8	1.4	106.0

Figures are U.S. dollars in millions. \*Data supplied by Mindshare/JWT.

## Taiwan

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$41.6	\$45.9	-9.4
Far Glory Group Construction	21.5	2.7	691.3
China Motor	16.8	15.5	8.5
Nissan Motor Co.	14.9	14.6	2.4
Ford Motor Co.	14.3	16.7	-14.4
Tainan Group	14.3	15.5	-7.8
Unilever	13.5	16.3	-16.8
L'Oreal	13.5	16.7	-19.3
Chunghwa Telecom	13.5	15.6	-13.8
Wm. Wrigley Jr. Co.	12.1	15.8	-23.8

Figures are U.S. dollars in millions.

## Thailand

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Unilever	\$100.7	\$94.4	6.8
Government of Thailand	59.5	51.9	14.8
Procter & Gamble Co.	44.8	41.9	6.9
Advance Info Service	35.2	46.6	-24.5
Toyota Motor Corp.	26.2	24.5	7.0
Ajinomoto Co.	25.9	21.8	18.9
GMM Grammy Public Co.	25.4	24.6	3.3
Osotspa (Teck Heng Yoo)	24.5	27.0	-9.4
Sony Corp.	24.4	22.2	9.9
Total Access Communications	21.9	28.6	-23.4

Figures are U.S. dollars in millions.

## Vietnam

TNS Media Intelligence/Vietnam

ADVERTISER	2005	2004	%CHG
Unilever	\$41.9	\$29.0	44.4
Procter & Gamble Co.	17.3	10.2	69.8
Vinamilk Co.	7.4	3.8	93.0
Royal Friesland Foods	6.9	5.3	30.2
Vietnam Brewery	6.6	7.0	-5.4
Nokia Corp.	5.3	3.0	75.9
Honda Motor Co.	4.3	2.1	103.6
Nestle	4.1	3.0	35.1
Vietnam Mobile Telephone Services Co.	3.8	3.1	23.9
PepsiCo	3.7	4.1	-8.1

Figures are U.S. dollars in millions.

## EUROPE Austria

Focus Research

ADVERTISER	2005	2004	%CHG
Deutsche Telekom	\$70.8	\$45.9	54.1
Volkswagen	35.6	24.5	45.4
Aldi Group	30.3	26.1	15.8
ONE GSM	25.5	NA	NA
Edeka Zentrale	22.9	24.0	-4.6
Vienna Insurance Group	22.0	NA	NA
Metro Group	21.7	19.0	14.4
Telekom Austria	20.4	NA	NA
Tchibo Holding	19.5	25.4	-23.3
Lidl & Schwarz Stiftung & Co.	18.9	17.9	5.7

Figures are U.S. dollars in millions.

## Belgium

PUB Agency Book Online

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$99.5	\$106.5	-6.5
Belgacom	94.9	89.6	5.9
Government of Belgium	86.3	99.9	-13.6
Danone Group	83.0	85.5	-2.9
Unilever	79.5	78.1	1.8
Volkswagen	51.0	42.2	21.0
L'Oreal	43.5	51.9	-16.2
Carrefour	38.1	25.7	48.3
Ford Motor Co.	32.7	27.3	19.7
Fortis	32.6	30.6	6.6

Figures are U.S. dollars in millions.

## Bosnia and Herzegovina

Mareco Index Bosnia/Gallup/TNS Media Intelligence

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$8.1	\$6.8	19.1
Coca-Cola Co.	7.3	4.3	69.8
Reckitt Benckiser	7.1	2.0	255.0
Tchibo Holding	4.1	2.6	57.7
Wm. Wrigley Jr. Co.	2.7	1.8	50.0
SC Johnson	2.2	NA	NA
Drenik	1.9	1.4	35.7
Henkel	1.7	1.6	6.2
Lijanovici	1.5	NA	NA
Saponia Osijek	1.3	1.7	-23.5

Figures are U.S. dollars in millions.

## Bulgaria

Ad-Ex Monitoring; TNS TVPlan

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$24.3	\$19.3	25.9
Telekom Austria	17.2	11.9	44.5
Nestle	12.1	6.3	91.0
Coca-Cola Co.	11.9	7.8	52.6
Hellenic Telecommunications Org. (OTE)	11.8	7.3	60.9
BTK	10.3	1.3	683.3
Henkel	7.6	4.8	60.2
Wm. Wrigley Jr. Co.	7.1	5.9	20.9
Unilever	6.9	7.2	-5.1
Altria Group	6.7	5.5	20.8

Figures are U.S. dollars in millions.

## Croatia

AGB Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Deutsche Telekom	\$43.0	\$25.8	66.6
Reckitt Benckiser	27.3	21.8	25.2
Procter & Gamble Co.	27.3	20.2	34.7
Telekom Austria	23.5	12.4	89.7
Coca-Cola Co.	22.0	14.2	55.5
Unilever	14.4	7.7	87.7
SC Johnson	13.9	13.8	0.5
Henkel	12.2	11.5	6.0
Hrvatska Lutrija	11.5	6.9	65.5
Styria Medien	10.9	4.2	159.4

Figures are U.S. dollars in millions.

## Czech Republic

TNS A-Connect

ADVERTISER	2005	2004	%CHG
Vodafone Group (incl. Oskar)	\$77.1	\$33.2	132.5
Danone Group (incl. Opavia Lu)	56.1	51.9	8.0
Telefonica (incl. Eurotel and Cesky Telecom)	55.4	48.6	14.2
Deutsche Telekom (incl. T-Mobile)	47.5	32.8	44.9
Procter & Gamble Co.	45.8	24.6	85.8
Unilever	29.7	18.5	60.8
Volkswagen	29.0	26.2	10.7
Walmart	27.7	18.9	47.0
Henkel	27.7	19.9	38.9
L'Oreal	24.2	16.0	51.1

Figures are U.S. dollars in millions.

# GLOBAL MARKETERS: Top 10 Global Marketers by Country

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## Denmark

TNS Gallup

ADVERTISER	2005	2004	%CHG
TDC	\$45.9	\$52.9	-13.2
Dansk Supermarked	22.1	13.6	62.5
TeliaSonera	21.9	16.4	33.6
Danske Bank Group	21.6	23.3	-7.4
Carlsberg	21.1	19.5	8.1
Procter & Gamble Co.	20.7	19.1	8.5
Danske Spil	20.3	21.7	-6.5
Telenor	20.2	15.4	31.6
DSB	17.5	15.5	13.0
Volkswagen	16.3	12.7	28.7

Figures are U.S. dollars in millions.

## Estonia

TNS Emor/TNS Media Intelligence

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$3.5	\$2.9	21.3
TeliaSonera	2.6	2.9	-10.3
Royal Ahold	1.5	0.9	61.9
Swedbank	1.5	0.6	152.5
Tele2	1.1	1.1	3.4
Coca-Cola Co.	1.1	0.8	41.5
Elisa Corp.	1.1	0.8	30.6
A-Selver	1.1	0.7	41.8
Reckitt Benckiser	1.0	0.8	15.1
L'Oreal	1.0	0.8	14.2

Figures are U.S. dollars in millions.

## Finland

TNS Gallup

ADVERTISER	2005	2004	%CHG
TeliaSonera	\$19.2	\$22.9	-16.3
Elisa Corp.	18.9	21.6	-12.6
Unilever	16.1	14.3	12.4
Ford Motor Co.	13.5	13.2	1.9
Saunalahti Group	12.5	9.9	26.5
Finnet	10.3	9.5	8.3
Volkswagen	10.0	8.3	21.2
Procter & Gamble Co.	9.9	10.3	-3.3
L'Oreal	9.7	9.0	8.6
Nokia Corp.	9.7	7.1	35.3

Figures are U.S. dollars in millions.

## France

TNS Media Intelligence

ADVERTISER	2005	2004	%CHG
Vivendi	\$474.2	\$459.4	3.2
L'Oreal	347.3	339.4	2.3
France Telecom	336.4	351.8	-4.4
PSA Peugeot Citroen	311.2	295.4	5.4
Association Familiale Mulliez	277.6	282.1	-1.6
Renault	242.7	246.7	-1.6
Danone Group	224.3	324.9	-31.0
Nestle	222.3	229.2	-3.0
Carrefour	201.1	265.2	-24.2
Unilever	191.1	168.0	13.8

Figures are U.S. dollars in millions, discounted by 44.

## Germany

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Metro Group	\$331.7	\$303.7	9.2
Lidl & Schwarz Stiftung & Co.	268.2	261.9	2.4
Deutsche Telekom	253.8	224.0	13.3
Procter & Gamble Co.	248.2	285.9	-13.2
Unilever	226.1	181.8	24.4
Volkswagen	223.1	201.6	10.6
Axel Springer Verlag	212.9	220.1	-3.3
Aldi Group	204.5	191.9	6.6
L'Oreal	195.8	186.6	4.9
Bertelsmann	181.1	194.1	-6.7

Figures are U.S. dollars in millions.

## Greece

Media Services via JWT

ADVERTISER	2005	2004	%CHG
Hellenic Telecommunications Org. (OTE)	\$68.9	\$44.6	54.4
Vodafone Group	41.7	28.1	48.3
TIM Hellas Telecommunications	35.2	17.2	105.2
Procter & Gamble Co.	33.7	26.3	28.3
Delta Dairy	32.3	21.8	48.5
OPAP (Greek Lotteries)	30.2	11.7	158.3
Multichoice Hellas	26.3	11.1	137.0
Nestle	22.1	16.6	32.7
L'Oreal	20.3	9.9	103.9
Germanos Group	20.2	13.4	50.3

Figures are U.S. dollars in millions.

## Hungary

TNS Media Intelligence

ADVERTISER	2005	2004	%CHG
Deutsche Telekom	\$132.2	\$111.1	19.0
Procter & Gamble Co.	85.3	60.8	40.4
Unilever	79.7	72.9	9.3
Danone Group	56.8	58.5	-2.9
Telenor	55.4	54.1	2.5
Reckitt Benckiser	53.4	46.7	14.4
Henkel	52.0	33.5	55.4
Bayer	44.9	4.0	NA
Vodafone Group	42.7	38.6	10.4
L'Oreal	41.5	43.1	-3.8

Figures are U.S. dollars in millions.

## Ireland

Institute of Advertising Practitioners in Ireland

ADVERTISER	2005	2004	%CHG
Government of Ireland	\$55.5	\$50.7	9.4
Diageo	27.0	32.6	-17.3
Unilever	24.4	18.6	31.4
Vodafone Group	22.8	17.0	34.3
DSG International	20.3	22.8	-11.1
Sherry FitzGerald Group	19.1	16.0	19.8
Procter & Gamble Co.	16.8	23.8	-29.5
CB Richard Ellis Group	16.7	15.5	8.0
C&C Group	15.8	16.3	-3.0
Tesco	15.8	16.6	-5.1

Figures are U.S. dollars in millions.

## Italy

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Unilever	\$142.2	\$136.8	3.9
Telecom Italia	141.7	143.3	-1.1
Procter & Gamble Co.	137.8	144.8	-4.8
Fiat	134.1	141.8	-5.5
Ferrero	105.8	111.4	-5.0
Vodafone Group	94.6	83.0	14.0
Barilla Holding	94.0	94.5	-0.5
L'Oreal	93.2	101.6	-8.2
Nestle	87.8	92.4	-5.0
General Motors Corp.	82.9	74.0	12.1

Figures are U.S. dollars in millions, discounted by 44.

## Latvia

TNS Latvia/TNS Media Intelligence

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$27.7	\$19.7	40.8
Reckitt Benckiser	8.4	4.5	86.8
TeliaSonera	7.5	5.1	48.4
Coca-Cola Co.	7.0	4.5	55.0
Tele2	5.9	3.6	65.7
Colgate-Palmolive Co.	5.5	3.9	40.8
Unilever	4.5	4.1	8.4
Altria Group	4.3	3.9	9.0
VP Market	4.3	4.3	-0.5
Wm. Wrigley Jr. Co.	3.6	1.7	112.0

Figures are U.S. dollars in millions.

## Lithuania

TNS Gallup/TNS Media Intelligence

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$28.2	\$24.5	15.3
Tele2	17.2	12.9	33.9
TeliaSonera	14.7	11.8	25.0
BIT	13.2	9.3	42.3
Reckitt Benckiser	12.3	7.9	56.3
VP Market	11.0	11.0	0.3
Baltic Beverages Holding	9.9	5.7	74.8
Berlin-Chemie Menarini Group	9.4	6.7	41.3
Colgate-Palmolive Co.	8.3	2.2	283.6
Danone Group	8.0	5.4	49.0

Figures are U.S. dollars in millions.

## Macedonia

SMMRI via JWT

ADVERTISER	2005	2004	%CHG
Coca-Cola Co.	\$5.2	\$4.9	5.4
Unilever	3.6	2.8	30.5
Procter & Gamble Co.	3.2	4.4	-27.3
Status Confectionary	3.1	2.6	18.8
Wm. Wrigley Jr. Co.	3.0	2.2	38.6
Makpetrol Fuel	2.7	1.1	144.7
Grand Coffe	2.1	1.0	104.7
Vreme Newspaper	1.6	2.7	-41.6
Ford Motor Co.	1.5	0.9	56.7
Rio Coffee	1.4	0.8	70.0

Figures are U.S. dollars in millions.

## Netherlands

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Unilever	\$188.3	\$139.8	34.7
Procter & Gamble Co.	105.4	106.4	-1.0
Royal KPN	93.7	101.5	-7.7
Government of the Netherlands	81.3	57.4	41.5
L'Oreal	77.8	67.4	15.5
Royal Ahold	64.1	64.8	-1.1
Tchibo Holding	47.3	42.9	10.2
Danone Group	43.8	36.6	19.7
Reckitt Benckiser	40.0	44.1	-9.3
Laurus	37.2	34.8	6.8

Figures are U.S. dollars in millions, discounted by AA.

## Norway

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Orkla	\$97.1	\$84.8	14.6
Telenor	78.2	71.8	8.9
Coop Norden	38.2	39.0	-2.1
Tele2	32.0	28.4	12.6
Volkswagen	30.6	27.1	13.0
Tine Ba	28.1	24.3	15.9
L'Oreal	27.9	26.1	7.1
Procter & Gamble Co.	27.0	22.8	18.4
Royal Ahold	25.5	3.9	548.3
Ford Motor Co.	25.0	22.5	11.2

Figures are U.S. dollars in millions.

## Poland

Expert Monitor

ADVERTISER	2005	2004	%CHG
Telekomunikacja Polska	\$129.2	\$117.9	9.6
Procter & Gamble Co.	121.8	109.3	11.4
Unilever	108.9	70.1	55.4
Polska Telefonía Cyfrowa	80.5	68.9	16.9
Polkomtel	68.8	63.1	9.0
L'Oreal	67.2	72.0	-6.8
Nestle	66.4	63.8	4.0
Agora	47.3	29.0	62.8
US Pharmacia	42.8	43.6	-1.8
Danone Group	42.1	50.6	-16.8

Figures are U.S. dollars in millions.

## Portugal

Mediamonitor via McCann Worldgroup

ADVERTISER	2005	2004	%CHG
Portugal Telecom	\$173.1	\$142.6	21.4
Vodafone Group	129.6	103.3	25.5
Sonae	108.2	83.3	29.8
Procter & Gamble Co.	104.7	84.5	24.0
Optimus Telecomunicacoes	102.7	NA	NA
Reckitt Benckiser	99.9	77.1	29.5
Unilever	80.8	NA	NA
L'Oreal	73.6	69.3	6.2
Danone Group	73.3	71.6	2.4
Lactogal	69.1	54.6	26.6

Figures are U.S. dollars in millions.

## Romania

Alfa Cont Mediawatch

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$26.0	\$22.5	15.8
Danone Group	18.1	7.7	136.1
Unilever	17.0	11.5	48.2
Coca-Cola Co.	13.3	10.9	21.6
Altria Group	12.7	8.7	46.9
L'Oreal	12.1	6.4	89.1
Henkel	11.9	5.2	127.6
Quadrant Amroq Beverages	11.8	5.7	107.2
European Drinks & European Food	11.4	8.9	28.9
Nestle	9.6	5.3	79.2

Figures are U.S. dollars in millions, discounted by AA.

## Russia

TNS Gallup AdFact

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$207.5	\$155.4	33.5
Unilever	81.9	49.3	66.2
L'Oreal	81.3	63.2	28.7
Nestle	60.4	50.4	19.7
Mars Inc.	60.0	42.4	41.3
Henkel	55.7	40.2	38.6
Wimm-Bill-Dann Foods	52.3	53.0	-1.2
Danone Group	52.0	37.4	39.2
Mobile Telesystems	47.6	26.8	77.4
Vimpel-Communications	47.2	30.7	53.8

Figures are U.S. dollars in millions, discounted by AA.

## Serbia

AGB Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$36.1	\$23.5	53.6
InBev	24.8	12.9	93.0
MB Pivara	19.3	10.5	83.6
Drzavna Lutrija Srbije	17.9	NA	NA
Coca-Cola Co.	15.5	13.2	17.3
Henkel	15.4	8.6	78.4
Tchibo Holding	12.3	7.1	74.3
Wm. Wrigley Jr. Co.	10.2	4.0	151.1
Unilever	9.9	4.6	113.1
Drenik	9.5	7.8	22.8

Figures are U.S. dollars in millions. 2004 data includes Montenegro.

## Slovak Republic

TNS A-Connect

ADVERTISER	2005	2004	%CHG
Deutsche Telekom (T-Mobile, Slovak Tel.)	\$104.3	\$73.8	41.3
France Telecom (incl. Orange)	52.0	35.6	46.1
Procter & Gamble Co.	33.6	16.8	99.7
L'Oreal	19.3	9.7	100.2
Henkel	19.0	14.3	33.2
Unilever	18.8	5.4	245.7
Nestle	17.7	18.0	-1.6
Reckitt Benckiser	17.0	11.0	54.0
Volkswagen	14.1	9.3	52.0
Banca Intesa (incl. VUB)	12.9	8.3	55.4

Figures are U.S. dollars in millions.

## Slovenia

Mediana

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$23.1	\$19.0	21.6
Reckitt Benckiser	16.8	17.4	-3.6
Telekom Slovenije	13.0	15.2	-14.6
L'Oreal	12.6	11.3	11.9
Henkel	11.5	11.0	4.6
Telekom Austria	10.4	NA	NA
Danone Group	8.8	6.0	46.5
Tchibo Holding	8.2	9.3	-12.5
Delo Revije	8.1	8.6	-5.7
Wm. Wrigley Jr. Co.	7.5	6.0	24.7

Figures are U.S. dollars in millions.

## Spain

InfoAdex (a TNS partner)

ADVERTISER	2005	2004	%CHG
Telefonica	\$150.3	\$135.7	10.8
El Corte Ingles	126.9	107.5	18.1
Procter & Gamble Co.	125.4	135.1	-7.1
Volkswagen	110.4	102.6	7.6
L'Oreal	105.6	99.8	5.8
Unilever	103.8	78.6	32.0
Danone Group	79.2	79.3	-0.1
PSA Peugeot Citroen	72.7	75.4	-3.6
Vodafone Group	70.4	50.5	39.3
Ford Motor Co.	67.5	59.5	13.5

Figures are U.S. dollars in millions, discounted by AA.

## Sweden

IRM-Institute for Advertising &amp; Media Statistics

ADVERTISER	2005	2004	%CHG
Ford Motor Co.	\$66.0	\$60.8	8.5
Kooperativa Forbundet	61.7	59.5	3.6
Royal Ahold	61.2	64.2	-4.6
Procter & Gamble Co.	57.5	54.9	4.7
General Motors Corp.	45.9	39.7	15.5
Carlsberg	43.8	33.4	31.4
Swedbank	43.2	33.4	29.1
Volkswagen	41.8	33.7	24.0
Hutchison Whampoa	40.7	38.1	6.8
Svenska Spel	40.5	50.7	-20.2

Figures are U.S. dollars in millions.

## Switzerland

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Federation of Migros Cooperatives	\$157.2	\$197.3	-20.3
Coop	151.8	187.5	-19.1
Swisscom	57.8	54.1	6.8
Procter & Gamble Co.	47.8	45.4	5.3
Nestle	40.6	37.8	7.5
General Motors Corp.	29.9	27.6	8.3
Credit Suisse Group	28.7	29.9	-4.0
Unilever	28.5	27.9	2.5
PSA Peugeot Citroen	27.3	25.4	7.7
Denner	25.6	20.4	25.4

Figures are U.S. dollars in millions.

## Turkey

Bilesim Media

ADVERTISER	2005	2004	%CHG
Unilever	\$135.8	\$68.3	98.7
Ulker	131.2	64.4	103.9
Procter & Gamble Co.	129.1	76.2	69.3
Koc Holding	86.6	41.4	109.3
Reckitt Benckiser	70.1	30.9	126.9
Coca-Cola Co.	69.3	39.9	73.5
Danone Group	55.7	20.9	167.1
Nestle	45.7	13.7	233.5
PepsiCo	42.2	15.7	168.0
Vestel	39.9	21.4	86.4

Figures are U.S. dollars in millions.

## United Kingdom

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$395.3	\$447.4	-11.7
Unilever	384.7	357.4	7.6
COI Communications	303.2	305.3	-0.7
L'Oreal	206.9	195.5	5.9
Ford Motor Co.	191.0	206.9	-7.7
France Telecom	160.2	144.6	10.8
DFS Furniture	156.4	128.4	21.8
General Motors Corp.	156.1	144.7	7.9
DSG International	155.9	173.3	-10.0
Volkswagen	155.5	148.6	4.6

Figures are U.S. dollars in millions.

## Ukraine

All-Ukrainian Advertising Coalition

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$17.0	NA	NA
Samsung Group	13.0	NA	NA
Telenor	13.0	NA	NA
Mobile Telesystems	11.0	NA	NA
Altria Group	14.0	NA	NA
LG Group	8.0	NA	NA
Turkcell	7.0	NA	NA
Unilever	7.0	NA	NA
Nestle	7.0	NA	NA
InBev	6.0	NA	NA

Figures are U.S. dollars in millions, discounted by 44.

## LATIN AMERICA

### Argentina

Ibope

ADVERTISER	2005	2004	%CHG
Danone Group	\$33.7	\$19.5	72.6
Unilever	30.7	26.2	16.9
Procter & Gamble Co.	15.2	13.6	11.8
Editorial Agea	14.0	10.7	30.1
Cencosud	13.7	8.8	55.5
SC Johnson	11.4	6.4	77.5
Telefonica	10.5	9.4	11.2
America Movil	10.4	6.7	55.2
Telecom Argentina	10.4	6.8	52.9
InBev	8.8	6.1	44.3

Figures are U.S. dollars in millions, discounted by 44.

### Brazil

Ibope

ADVERTISER	2005	2004	%CHG
Casas Bahia	\$319.7	\$175.1	82.6
Silvio Santos Group	68.2	45.8	48.7
Unilever	58.4	53.0	10.2
General Motors Corp.	53.7	38.2	40.6
Companhia Brasileira de Distribuicao	47.4	33.3	42.4
Fiat	42.9	27.6	55.2
Ford Motor Co.	41.0	27.7	48.4
Vivo	40.3	36.5	10.5
Government of Brazil	37.3	30.5	22.4
America Movil	36.3	20.5	77.1

Figures are U.S. dollars in millions, discounted by 44.

### Chile

Ibope

ADVERTISER	2005	2004	%CHG
Unilever	\$10.8	\$9.8	11.0
Procter & Gamble Co.	10.6	7.3	45.2
Falabella	7.6	6.8	12.0
Nestle	6.7	5.7	18.3
Quinenco	6.5	4.9	33.6
Almacenes Paris	5.6	3.8	46.3
Ecusa	5.3	4.6	13.8
Comercial E.C.C.S.A.	5.3	5.2	2.1
Entel	4.4	5.0	-11.4
SC Johnson	4.1	2.7	50.7

Figures are U.S. dollars in millions, discounted by 44.

### Colombia

Ibope

ADVERTISER	2005	2004	%CHG
Bancolombia	\$10.6	\$8.7	22.5
Procter & Gamble Co.	7.7	5.2	47.7
Postobon	7.5	6.5	15.5
America Movil	7.4	4.1	82.6
Coca-Cola Co.	6.8	5.1	33.2
SABMiller	6.3	8.3	-23.5
Tecnoquimicas	5.6	4.1	36.8
Unilever	5.1	3.6	42.6
Colombia Telecomunicaciones	4.7	4.8	-2.0
Telefonica	4.4	0.0	NA

Figures are U.S. dollars in millions, discounted by 44.

### Ecuador

Ibope

ADVERTISER	2005	2004	%CHG
Unilever	\$7.6	\$4.5	69.0
America Movil	3.3	2.0	60.0
Telefonica	2.8	1.8	51.5
Colgate-Palmolive Co.	2.5	2.7	-6.4
SABMiller	2.4	2.4	2.1
Loteria Nacional	2.2	2.5	-9.8
Procter & Gamble Co.	1.7	1.1	62.8
Bayer	1.7	1.5	15.9
Andinatel	1.6	1.6	1.5
Nestle	1.5	1.5	3.9

Figures are U.S. dollars in millions, discounted by 44.

### Mexico

Ibope

ADVERTISER	2005	2004	%CHG
Televisa Group	\$151.5	\$153.6	-1.3
Procter & Gamble Co.	95.0	109.1	-13.0
Salinas Group	84.4	79.5	6.1
Pres. de la Republica Mexicana	76.3	35.1	117.1
Unilever	75.9	65.1	16.6
Camara de Diputados	63.1	42.0	50.2
PepsiCo	57.8	60.2	-3.9
Coca-Cola Co.	57.0	31.6	80.4
Orfeon	55.3	24.1	129.1
Bimbo Group	53.7	56.5	-5.0

Figures are U.S. dollars in millions, discounted by 44.

## Panama

Ibope

ADVERTISER	2005	2004	%CHG
Cable & Wireless	\$10.5	\$7.8	35.4
Telefonica	5.0	NA	NA
TV Shopping	4.0	NA	NA
Nestle	3.1	3.0	5.0
Farmacias Arrocha	2.8	1.5	80.1
Do It Center	2.8	4.5	-38.4
Dist. Comercial	2.6	2.2	20.3
Colgate-Palmolive Co.	2.5	2.1	23.4
Panamotor	2.5	1.4	74.9
Corp. La Prensa	2.4	1.3	89.7

Figures are U.S. dollars in millions.

## Paraguay

Ibope

ADVERTISER	2005	2004	%CHG
Unilever	\$1.5	\$1.0	47.0
Gateway Telecommunications	1.2	1.2	-4.5
InBev	0.8	0.7	10.8
Government of Paraguay	0.7	0.6	9.9
Talisman	0.6	0.5	13.1
Gambling	0.6	0.1	489.6
Telecom Argentina	0.5	0.5	-0.6
Tchibo Holding	0.5	0.5	-3.4
Millicom International Cellular	0.5	0.4	9.5
Salemma	0.4	0.2	74.9

Figures are U.S. dollars in millions, discounted by 44.

## Peru

Ibope

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$10.1	\$9.1	10.1
Alicorp	6.1	4.2	44.4
Telefonica	4.7	3.7	27.4
SABMiller	3.7	3.3	11.5
Presidencia de la Republica	3.6	1.5	135.2
America Movil	3.3	1.5	126.3
Nestle	3.2	2.0	59.2
Coca-Cola Co.	3.2	2.2	41.2
Unilever	3.1	2.0	53.5
Grupo Gloria	2.7	2.1	28.5

Figures are U.S. dollars in millions, discounted by 44.

## Puerto Rico

Mediafax

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$39.5	\$37.1	6.5
Sears Holdings Corp.	28.7	30.0	-4.1
Verizon Communications	23.9	20.2	18.3
Pfizer	22.2	28.6	-22.3
Popular Inc.	22.2	25.9	-14.2
Yum Brands	21.8	21.7	0.3
Walgreens	19.3	18.4	5.1
R&G Financial Corp.	19.1	21.5	-11.2
BMJ Caribbean Restaurants	18.7	19.9	-6.1
Colgate-Palmolive Co.	18.6	18.9	-2.0

Figures are U.S. dollars in millions.

## Uruguay

Ibope

ADVERTISER	2005	2004	%CHG
Unilever	\$5.1	\$4.1	26.7
SC Johnson	4.7	1.7	184.9
Johnson & Johnson	3.5	2.1	67.1
El Pais	3.1	NA	NA
L'Oreal	2.1	1.3	67.3
Conaprole	1.8	0.9	93.5
America Movil	1.6	0.3	408.7
Montevideo Refrescos	1.5	1.0	58.8
GlaxoSmithKline	1.5	1.5	-2.0
Banca de Quinielas	1.5	0.4	288.4

Figures are U.S. dollars in millions, discounted by 44.

## Venezuela

Ibope

ADVERTISER	2005	2004	%CHG
Cedesa	\$24.6	\$16.7	47.4
Mensajeria de Texto	24.5	NA	NA
Procter & Gamble Co.	16.0	14.9	7.9
Unilever	10.0	6.1	64.2
Coca-Cola Co.	9.4	5.6	68.4
Digitel GSM	8.9	NA	NA
Telefonica	8.4	NA	NA
Konsuma De Venezuela	8.3	NA	NA
Gobierno Bolivariano	8.0	NA	NA
Nestle	7.6	4.9	55.0

Figures are U.S. dollars in millions, discounted by 44.

## MIDDLE EAST

### Bahrain

Pan Arab Research Center

ADVERTISER	2005	2004	%CHG
Bahrain Grand Prix	\$6.1	\$0.7	789.0
Batelco	1.9	4.1	-53.4
Government of Bahrain	1.8	NA	NA
Vodafone Group	1.7	2.5	-31.5
Bahrain Intl. Circuit	1.7	NA	NA
Emjoi	1.3	0.7	81.6
General Motors Corp.	1.3	0.6	104.0
Conair Corp.	1.1	2.4	-51.5
Tra	1.1	NA	NA
Bank of Bahrain & Kuwait	0.9	NA	NA

Figures are U.S. dollars in millions.

### Egypt

Pan Arab Research Center

ADVERTISER	2005	2004	%CHG
Mobinil	\$13.0	\$11.0	17.6
Vodafone Group	9.5	7.6	25.2
National Bank of Egypt	7.7	3.4	124.8
Egyptian President	6.5	NA	NA
PepsiCo	5.7	4.2	35.7
Dar Al Opera	4.1	NA	NA
Government of Egypt	3.9	NA	NA
Telecom Egypt	3.3	3.7	-11.2
Hyundai Motor Co.	3.3	1.7	88.7
Egyptair	3.2	2.5	29.3

Figures are U.S. dollars in millions.

### Jordan

Pan Arab Research Center

ADVERTISER	2005	2004	%CHG
Fastlink	\$5.7	\$3.5	64.3
Mobilecom	3.9	3.0	27.4
Jordan National	3.1	0.0	NA
Arab Bank	2.7	0.9	202.6
Umniah	2.5	0.0	NA
Jordan Telecom	2.1	2.2	-4.8
Xpress	1.6	1.2	33.3
Housing Bank	1.5	1.1	45.3
Bank of Jordan	1.5	1.2	28.1
PepsiCo	1.2	0.9	33.2

Figures are U.S. dollars in millions.

### Israel

IFAT

ADVERTISER	2005	2004	%CHG
Bezeq	\$19.0	\$25.0	-24.0
Strauss Dairy	16.0	26.0	-38.5
Hutchison Whamoa	13.5	14.0	-3.6
Cellcom	13.5	17.0	-20.6
Procter & Gamble Co.	12.3	17.0	-27.6
Coca-Cola Co.	12.0	11.0	9.1
Unilever	12.0	10.0	20.0
Osem	12.0	11.0	9.1
Supersol	10.5	7.0	50.0
HOT-Israel Cable Assn. and Gen. Mills*	10.5	12.0	-12.5

Figures are U.S. dollars in millions. \*Hot and General Mills were tied at No. 10.

### Kuwait

Pan Arab Research Center

ADVERTISER	2005	2004	%CHG
Wataniya Telecom	\$7.1	\$3.1	127.9
Yum Brands	6.6	6.1	8.0
Toyota Motor Corp.	6.1	5.4	14.5
Al Rai	5.1	0.0	NA
Vodafone Group	4.9	6.1	-20.1
N.B.K.	4.7	3.4	39.1
General Motors Corp.	4.1	2.0	109.5
Little Caesars Enterprises	3.4	3.0	15.5
Gulf Bank	3.1	1.5	102.0
Ford Motor Co.	3.1	3.1	-2.3

Figures are U.S. dollars in millions.

### Lebanon

Pan Arab Research Center

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$39.5	\$13.9	184.8
PepsiCo	12.8	1.7	644.7
Byblos Bank	11.3	NA	NA
Coca-Cola Co.	6.1	1.8	245.4
Nestle	5.5	1.4	279.5
Air New Zealand	4.8	NA	NA
Banque Audi	4.6	NA	NA
Al Mafroushat Fur	4.3	NA	NA
Blom Bank	4.0	1.0	283.9
GMA	3.8	2.1	83.7

Figures are U.S. dollars in millions.

## Oman

Pan Arab Research Center

ADVERTISER	2005	2004	%CHG
Government of Oman	\$5.7	NA	NA
Omantel	4.0	4.1	-3.0
Mobile Telecom	3.6	0.9	308.0
Bank Muscat	3.1	2.5	25.7
Toyota Motor Corp.	2.8	3.1	-8.9
Nawras Telecom	2.1	NA	NA
Al Shabiba	1.7	0.5	267.8
Muscat Festival	1.7	2.0	-14.7
Oman Mobile	1.6	0.6	187.0
Oman International Bank	1.5	1.2	18.5

Figures are U.S. dollars in millions.

## Qatar

Pan Arab Research Center

ADVERTISER	2005	2004	%CHG
Q-Tel	\$2.1	\$1.7	22.5
Doha Bank	2.0	1.3	55.8
Qatar National Bank	1.3	0.8	74.8
Qatar Call	1.3	0.4	218.7
Government of Qatar	1.2	NA	NA
Qatar Airways	1.1	0.9	19.8
Commercial Bank of Qatar	1.1	0.5	128.6
Al Shefa Hosp.	1.0	NA	NA
Toyota Motor Corp.	0.9	0.4	122.1
Kia Motors Corp.	0.9	0.8	1.7

Figures are U.S. dollars in millions.

## Saudi Arabia

Pan Arab Research Center

ADVERTISER	2005	2004	%CHG
Saudi Telecom	\$20.9	\$13.3	56.3
Mobily	18.4	NA	NA
General Motors Corp.	13.3	6.1	118.6
National Commerce Bank	12.8	7.5	69.5
Toyota Motor Corp.	11.3	12.1	-6.6
Nokia Corp.	8.5	2.7	217.1
Government of Saudi Arabia	8.2	NA	NA
Al Riyadh Bank	6.4	3.9	62.1
Samba	6.0	4.9	21.8
Emaar	5.7	2.3	150.4

Figures are U.S. dollars in millions.

## Syria

Pan Arab Research Center

ADVERTISER	2005	2004	%CHG
Nokia Corp.	\$0.6	\$0.2	279.6
Nestle	0.4	0.7	-40.4
PepsiCo	0.4	NA	NA
Damascus International	0.4	0.4	-4.8
Syriatel	0.3	0.7	-53.1
94 Telephone	0.3	NA	NA
Samsung Group	0.3	0.2	40.5
Syrian Airways	0.3	0.1	76.2
Volkswagen	0.2	NA	NA
Hyundai Motor Co.	0.2	0.2	10.6

Figures are U.S. dollars in millions.

## United Arab Emirates

Pan Arab Research Center

ADVERTISER	2005	2004	%CHG
Nokia Corp.	\$8.8	\$9.1	-3.5
Emaar	8.5	6.0	42.3
Dubai Shopping Festival	7.5	8.7	-13.7
Al Bayan	7.5	NA	NA
Government of Dubai	7.3	NA	NA
Damas	5.9	4.5	30.1
Ford Motor Co.	5.3	NA	NA
Zahrat Al Khalij	5.0	NA	NA
Vakson	4.5	NA	NA
National Bank of Dubai	4.4	NA	NA

Figures are U.S. dollars in millions.

## Yemen

Pan Arab Research Center

ADVERTISER	2005	2004	%CHG
Ala Kaifak	\$1.1	NA	NA
Yemeni	0.9	NA	NA
Al Hana	0.6	NA	NA
Coca-Cola Co.	0.6	NA	NA
Abu Al Walad	0.5	NA	NA
Crystal	0.5	NA	NA
Al Sanabel	0.4	NA	NA
Danone Group	0.4	NA	NA
Luna	0.4	NA	NA
Bamujally	0.4	NA	NA

Figures are U.S. dollars in millions.

## CANADA AND U.S.

### Canada

Nielsen Media Research

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$172.2	\$169.9	1.3
Rogers Communications	106.5	99.6	6.9
General Motors Corp.	98.6	83.9	17.5
Telus Corp.	70.9	44.4	59.7
BCE	67.1	56.3	19.0
Wendy's International	61.1	56.0	9.1
L'Oreal	58.9	57.6	2.3
Sony Corp.	56.9	50.0	13.9
Toyota Motor Corp.	56.4	57.0	-1.0
Hyundai Motor Co.	54.4	46.8	16.1

Figures are U.S. dollars in millions.

### U.S. top 50

TNS Media Intelligence\*

ADVERTISER	2005	2004	%CHG
Procter & Gamble Co.	\$3,410.5	\$3,535.0	-3.5
General Motors Corp.	3,003.7	2,804.7	7.1
Time Warner	2,061.3	2,008.1	2.7
Verizon Communications	1,763.5	1,681.3	4.9
AT&T	1,688.4	2,282.8	-26.0
DaimlerChrysler	1,590.4	1,825.8	-12.9
Ford Motor Co.	1,582.9	1,574.1	0.6
Walt Disney Co.	1,412.9	1,493.0	-5.4
Johnson & Johnson	1,385.9	1,407.6	-1.5
Sprint Nextel Corp.	1,280.4	1,264.6	1.2
Federated Department Stores	1,206.3	1,291.6	-6.6
Altria Group	1,188.6	1,095.0	8.5
GlaxoSmithKline	1,162.9	891.5	30.4
General Electric Co.	1,130.9	996.9	13.4
PepsiCo	1,129.4	911.2	24.0
Toyota Motor Corp.	1,075.5	1,106.9	-2.8
Nissan Motor Co.	1,023.4	1,107.7	-7.6
Sony Corp.	995.6	936.1	6.4
Viacom	898.0	949.3	-5.4
Pfizer	882.5	1,056.7	-16.5
News Corp.	881.4	774.1	13.9
Honda Motor Co.	861.2	794.2	8.4
Sears Holdings Corp.	822.2	975.7	-15.7
L'Oreal	793.7	769.1	3.2
Dell	776.3	630.4	23.1
McDonald's Corp.	764.6	704.5	8.5
Unilever	761.1	573.4	32.7

ADVERTISER	2005	2004	% CHG
Yum Brands	724.9	684.3	5.9
U.S. Government	706.3	738.3	-4.3
Citigroup	622.5	615.5	1.1
Anheuser-Busch Cos.	606.8	547.1	10.9
Target Corp.	604.1	529.3	14.1
American Express Co.	602.0	421.0	43.0
Wal-Mart Stores	584.0	603.3	-3.2
General Mills	581.1	634.2	-8.4
Nestle	560.8	523.6	7.1
Home Depot	556.9	598.7	-7.0
Berkshire Hathaway	547.9	408.8	34.0
Deutsche Telekom	526.4	457.9	15.0
Novartis	523.2	638.2	-18.0
Hewlett-Packard Co.	507.9	556.5	-8.7
Clorox Co.	485.5	450.9	7.7
Coca-Cola Co.	471.0	414.0	13.8
Kellogg Co.	469.6	447.4	5.0
Microsoft Corp.	463.0	485.5	-4.6
AstraZeneca	437.8	493.7	-11.3
J.C. Penney Co.	428.9	446.4	-3.9
Hyundai Motor Co.	425.4	378.2	12.5
Volkswagen	424.8	423.5	0.3
Lowe's Cos.	423.7	366.6	15.6

Figures above are measured media only, in millions of dollars. Ad Age annually publishes a ranking of the 100 Leading National Advertisers (AA, June 26, 2006). That ranking is based on combined measured media figures and estimated unmeasured advertising spending. The ranking and a free PDF report containing profiles of the top 100 can be downloaded on AdAge.com. \*Nielsen Media Research also monitors U.S. ad spending.

# MULTINATIONAL AGENCY NETWORK ASSIGNMENTS

BEFORE THERE CAN BE A GLOBAL account assignment, there must be a global brand. And those are few given the litany of brands around the world. In fact, this report shows only 265 parent marketers with 544 accounts among them that meet *Ad Age's* "global" criteria: accounts worth \$5 million-plus handled in five or more countries.

Many of those marketers assign their accounts to multiple agency networks. In the next 37 pages, the global account survey (often called the Dots report), those 544 as defined by agency networks appear as a dot in each country where any of the 22 agency networks have been assigned the account.

## METHODOLOGY & QUALIFICATIONS

In the first section of this report, assignments, listed in alphabetical order by parent company, are shown by agency network and marked with a dot in countries where the agency handles the business. The second section lists clients by agency.

International agency networks were sent a standardized list of 61 countries, regions and country groups. Countries in regions such as the Caribbean are grouped together because of relatively low ad spending. For an agency to get credit for a region or country group, a client must use the agency in two or more countries within that region.

To illustrate the growing strength of marketing organizations that own more than one worldwide network, all agency networks within a common marketing organization bear the same color. As an example, Interpublic Group of Cos. owns McCann Erickson Worldwide, Lowe

Worldwide and DraftFCB and all are in green. Color-coding highlights the influence of parent marketing organizations among these multinational clients.

## COUNTRY GROUPINGS

**Africa:** Algeria, Botswana, Cameroon, Ethiopia, Ghana, Guyana, Ile de la Reunion, Ivory Coast, Kenya, Madagascar, Malawi, Mauritius, Morocco, Mozambique, Namibia, Nigeria, Senegal, Seychelles, Tanzania, Tunisia, Uganda, Zambia, Zimbabwe

**Balkans:** Albania, Bosnia & Herzegovina, Bulgaria, Croatia, Macedonia, Montenegro, Serbia, Slovenia

**Baltics:** Estonia, Latvia, Lithuania

**Caribbean:** Aruba, Bahamas, Barbados, Bermuda, Cayman Islands, Dominican Republic, Haiti, Jamaica, Martinique, Puerto Rico, Trinidad

**Central America:** Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Panama

**Indochina:** Cambodia, Laos, Myanmar, Vietnam

**Middle East:** Bahrain, Cyprus, Egypt, Iran, Iraq, Jordan, Kuwait, Lebanon, Oman, Qatar, Syria, United Arab Emirates, Yemen

**Russia/CIS:** Armenia, Belarus, Georgia, Moldova, Kazakhstan, Russia, Ukraine, Uzbekistan

# AGENCY ABBREVIATIONS

NETWORK	ABBREVIATION	HOLDING CO.
Arnold Worldwide Partners	.....Arnold	Havas
Bartle Bogle Hegarty	.....Bartle	Publicis Groupe*
Batey Ads	.....Batey	WPP Group
BBDO Worldwide	.....BBDO	Omnicom Group
DDB Worldwide	.....DDB	Omnicom Group
Dentsu	.....Dentsu	Dentsu Inc.
DraftFCB	.....DraftFCB	Interpublic Group of Cos.
Euro RSCG Worldwide	.....Euro RSCG	Havas
Fallon Worldwide	.....Fallon	Publicis Groupe
Grey Worldwide	.....Grey	WPP Group
Hakuhodo	.....Hakuhodo	Hakuhodo DY Holdings
JWT	.....JWT	WPP Group
Leo Burnett Worldwide	.....Burnett	Publicis Groupe
Lowe Worldwide	.....Lowe	Interpublic Group of Cos.
M&C Saatchi	.....MCSaatchi	
McCann Erickson Worldwide	....McCann	Interpublic Group of Cos.
Ogilvy & Mather Worldwide	.....O&M	WPP Group
Publicis	.....Publicis	Publicis Groupe
Saatchi & Saatchi	.....Saatchi	Publicis Groupe
TBWA Worldwide	.....TBWA	Omnicom Group
Wieden & Kennedy	.....W&K	
Y&R Advertising/DYR'	.....Y&R	WPP Group

\*Publicis Groupe owns 49% of Bartle. Asian assignments of the Y&R Advertising network are handled by Dentsu, Young & Rubicam Partnerships. WPP's Young & Rubicam owns 65% of DYR.









































































