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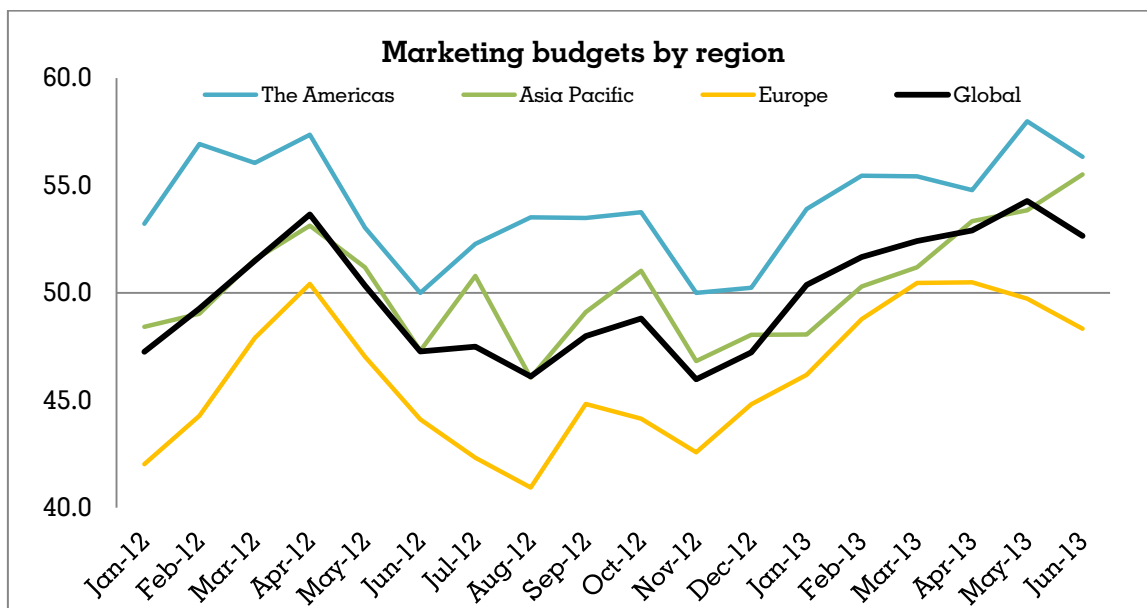
Marketing outlook healthy despite Europe budget dip

- Headline GMI positive for seventh consecutive month
- Budgets rise in Americas and Asia Pacific but decline in Europe
- Trading conditions and staffing levels continue to improve

London, 20 June 2013

Marketers are continuing to report confidence in the state of the industry, according to the latest results from Warc's Global Marketing Index (GMI).

Globally, marketing budgets were increased in June (52.7) but there were regional variations on this index. Marketers in the Americas continue to be most optimistic on 56.3, followed by Asia Pacific on 55.5 – the region's highest reading since this index began – but Europe slipped further to 48.3, representing a second month of decline.

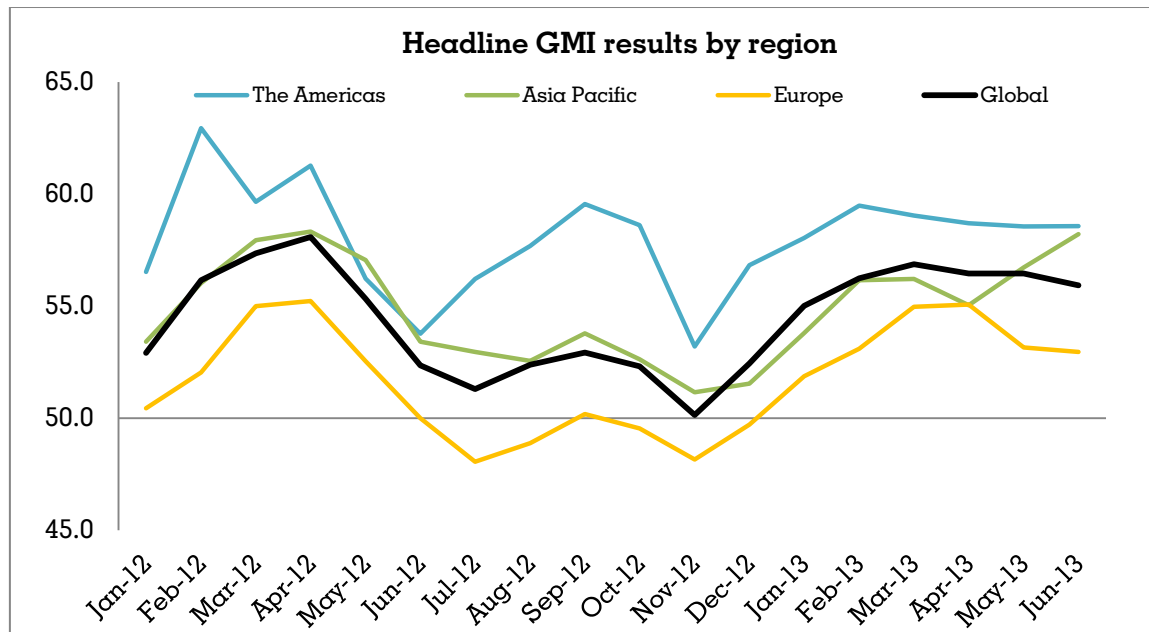


Above 50.0 = generally improving; below 50.0 = generally declining

The GMI is a unique indicator of the state of the global marketing industry. Every month it tracks conditions among marketers within their organisation and region. A GMI reading of 50 indicates no change, and above 60 indicates rapid growth.

The headline GMI measure – which takes into account marketers' expectations for trading conditions, staffing levels and marketing budgets – registered a global value of 55.9 in June, consistent with May's reading.

Region by region, the headline GMI registered 58.6 for the Americas, 58.2 for Asia Pacific and 53.0 for Europe.



*Above 50.0 = generally improving; below 50.0 = generally declining
Combines data for trading conditions, marketing budgets and staffing.*

The index of global trading conditions, the second component of headline GMI, continued to demonstrate confidence among the marketing community this month, registering a value of 58.1. Regional index values stand at 60.2 for the Americas, 59.9 for Asia Pacific and 55.8 for Europe.

The index of staffing levels remains positive, at 57.1 globally. Regional index values stand at 59.2 for both the Americas and Asia Pacific and 54.7 for Europe.

Suzy Young, Data and Journals Director at Warc, said: "Globally, marketing budgets continued to rise in June but this stems from solid growth in the Americas and Asia Pacific. European marketers are less confident and have reduced budgets for a second month. "

Warc is recruiting for the Global Marketing Index panel. For more detail, please visit: <http://www.warc.com/gmi>

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Editors' Notes:

About the Index

The Global Marketing Index provides a unique monthly indicator of the state of the global marketing industry, by tracking current conditions among marketers. Our global panel (1,225 members) consists of experienced executives working for brand owners, media owners, creative and media agencies and other organisations serving the marketing industry. The panel has been carefully selected to reflect trends in the three main global regions: Americas, Asia Pacific and Europe.

Methodology

Data collection period: 3–14 June 2013. The Global Marketing Index results are calculated by taking the percentage of respondents that report that the activity has risen ("Increasing") and adding it to one-half of the percentage that report the activity has not changed ("Unchanged"). Using half of the "Unchanged" percentage effectively measures the bias toward a positive (above 50 points) or negative (below 50 points) index. As an example of calculating a diffusion index, if the response is 40% "Increasing," 40% "Unchanged," and 20% "Reducing," the Diffusion Index would be 60 points ($40\% + [0.50 \times 40\%]$). A value of 50 indicates "no change" from the previous month.

The more distant the index is from the amount that would indicate "no change" (50 points), the greater the rate of change indicated. Therefore, an index value of 58 indicates a faster rate of increase than an index value of 53, and an index value of 40 indicates a faster rate of decrease than an index value of 45. A value of 100 indicates all respondents are reporting increased activity while 0 indicates that all respondents report decreased activity.

About Warc

Warc is the global provider of ideas and evidence to marketing people. It has produced trusted and independent data on advertising expenditure and media costs for more than 25 years, and has partnerships with leading advertising organisations in more than 80 countries. Warc's premium online service, www.warc.com, is the largest single source of intelligence for the marketing, advertising and media communities worldwide.

About World Economics

World Economics is an organisation dedicated to producing analysis, insight and data relating to questions of importance in understanding the world economy. The primary research objective is to encourage and assist the development of better and faster measures of economic activity. In cases where we believe we can contribute directly, as opposed to through highlighting the work of others, World Economics produces our own measures of economic activity. The work of World Economics is mainly of interest to investors, organisations and individuals in the financial sector and to significant corporations with global operations, as well as governments and academic economists. Find out more at www.worldeconomics.com