

# TOP 100 GLOBAL MARKETERS

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

RANK 2004	RANK 2003	ADVERTISER	HEADQUARTERS	WORLDWIDE ADVERTISING SPENDING			U.S. MEASURED MEDIA SPENDING			SPENDING BY REGION IN 2004		
				2004	2003	% CHG	2004	2003	% CHG	ASIA	EUROPE	LATIN AMERICA
1	1	<b>Procter &amp; Gamble Co.</b>	Cincinnati	\$7,922	\$6,734	17.6	\$3,572	\$3,165	12.8	\$1,351	\$2,547	\$214
2	3	<b>General Motors Corp.</b>	Detroit	3,918	3,293	19.0	2,798	2,371	18.0	137	779	83
3	2	<b>Unilever</b>	London/Rotterdam	3,462	3,395	2.0	603	621	-2.9	855	1,719	190
4	5	<b>Ford Motor Co.</b>	Dearborn, Mich.	2,798	2,434	15.0	1,643	1,449	13.4	98	919	51
5	7	<b>L'Oreal</b>	Paris	2,646	2,284	15.8	768	677	13.5	144	1,613	49
6	4	<b>Toyota Motor Corp.</b>	Toyota City, Japan	2,608	2,475	5.4	1,098	1,016	8.0	901	499	20
7	6	<b>Time Warner</b>	New York	2,495	2,301	8.4	1,938	1,833	5.8	129	387	9
8	8	<b>DaimlerChrysler</b>	Auburn Hills, Mich./Stuttgart, Germany	2,371	2,081	14.0	1,811	1,607	12.7	38	439	30
9	11	<b>Johnson &amp; Johnson</b>	New Brunswick, N.J.	1,922	1,700	13.0	1,393	1,276	9.2	105	355	17
10	9	<b>Nestle</b>	Vevey, Switzerland	1,899	1,848	2.8	498	523	-4.7	270	1,003	87
11	10	<b>Walt Disney Co.</b>	Burbank, Calif.	1,895	1,795	5.6	1,390	1,405	-1.1	119	337	4
12	12	<b>Nissan Motor Co.</b>	Tokyo	1,812	1,630	11.1	1,093	969	12.9	473	182	25
13	13	<b>Altria Group</b>	New York	1,645	1,504	9.4	1,108	1,048	5.7	24	459	18
14	15	<b>Honda Motor Co.</b>	Tokyo	1,642	1,462	12.3	791	716	10.5	631	168	8
15	20	<b>Coca-Cola Co.</b>	Atlanta	1,507	1,284	17.4	379	276	37.6	443	534	78
16	14	<b>Sony Corp.</b>	Tokyo	1,480	1,496	-1.0	933	1,001	-6.8	181	304	8
17	16	<b>Volkswagen</b>	Wolfsburg, Germany	1,455	1,364	6.7	418	450	-7.3	35	946	35
18	17	<b>McDonald's Corp.</b>	Oak Brook, Ill.	1,442	1,329	8.5	639	640	-0.1	289	443	25
19	18	<b>Pfizer</b>	New York	1,349	1,288	4.7	1,061	1,029	3.1	43	184	31
20	21	<b>GlaxoSmithKline</b>	Greenford, Middlesex, U.K.	1,303	1,173	11.1	889	791	12.4	92	275	23
21	19	<b>PepsiCo</b>	Purchase, N.Y.	1,286	1,287	-0.1	861	893	-3.5	78	210	88
22	24	<b>Reckitt Benckiser</b>	Windsor, Berkshire, U.K.	1,278	967	32.2	313	248	26.2	104	814	15
23	22	<b>Danone Group</b>	Paris	1,278	1,035	23.5	93	71	29.6	53	1,079	39
24	31	<b>Deutsche Telekom</b>	Bonn, Germany	1,097	794	38.1	445	359	24.1	0	652	0
25	25	<b>General Electric Co.</b>	Fairfield, Conn.	1,043	934	11.7	933	869	7.4	20	69	0
26	27	<b>PSA Peugeot Citroen</b>	Paris	1,032	878	17.6	0	0	NA	24	981	18
27	32	<b>Vodafone Group</b>	Newbury, U.K.	1,024	756	35.4	0	0	NA	350	655	3
28	26	<b>Yum Brands</b>	Louisville, Ky.	971	919	5.6	663	665	-0.2	167	60	24
29	28	<b>News Corp.</b>	New York	956	853	12.2	681	600	13.5	49	202	1
30	34	<b>Dell</b>	Austin, Texas	923	730	26.3	625	496	26.1	143	136	1
31	33	<b>Matsushita Electric Industrial Co.</b>	Kadoma, Japan	909	741	22.7	94	66	42.8	749	47	0
32	23	<b>Mars Inc.</b>	McLean, Va.	906	991	-8.5	407	433	-6.0	54	411	17
33	35	<b>Renault</b>	Boulogne-Billancourt, France	856	723	18.4	0	0	NA	5	827	17

Note: Figures are in millions of U.S. dollars and are AA estimates. 2003 rankings are based on data collected in 2005. Measured media in the U.S. include magazines, Sunday magazines, newspapers, national newspapers, outdoor, spot TV, network TV, syndicated TV, cable TV networks, 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 27, 2005). Outside the U.S. sources vary and are presented with each country chart beginning on Page 8.

## AD SPENDING BY CATEGORY

By measured media bought in 2004 and 2003

CATEGORY	MEASURED ADVERTISING EXPENDITURES				ADVERTISER COUNT
	2004	2003	% CHG	% TOTAL	
Automotive	\$22,693	\$20,116	12.8	24.2	17
Personal care	17,163	15,230	12.7	18.3	9
Entertainment & media	10,459	9,709	7.7	11.1	10
Pharmaceuticals	8,197	7,060	16.1	8.7	11
Food	8,015	7,550	6.2	8.5	8
Soft drinks	3,331	3,064	8.7	3.5	3
Electronics	3,186	2,719	17.2	3.4	6
Restaurants	3,148	2,898	8.6	3.4	4
Cleaners	2,982	2,581	15.5	3.2	4
Computers	2,973	2,857	4.0	3.2	4
Telecommunications	2,791	2,095	33.2	3.0	3
Retail	2,344	1,957	19.8	2.5	5
Beer, wine & liquor	2,197	2,109	4.2	2.3	6
Financial	2,095	1,683	24.4	2.2	4
Candy	1,067	941	13.4	1.1	2
Miscellaneous	1,297	1,196	8.5	1.4	4

Figures are U.S. dollars in millions and are AA estimates for the top 100 only.

## AD SPENDING BY REGION

By measured media bought in 2004 and 2003

REGION	MEASURED ADVERTISING EXPENDITURES				ADVERTISER COUNT
	2004	2003	% CHG	% TOTAL	
Africa	\$457	\$320	42.8	0.5	3
Asia and Pacific	13,168	11,449	15.0	14.0	15
Europe	30,655	26,305	16.5	32.6	33
Latin America	1,798	1,964	-8.4	1.9	12
Middle East	255	175	45.3	0.3	11
Canada	1,733	1,456	19.0	1.8	1
U.S.	45,871	42,096	9.0	48.8	1
Worldwide	93,937	83,764	12.1	100.0	76

Figures are U.S. dollars in millions and are AA estimates for the top 100 only.

## METHODOLOGY

THE MARKETERS who ultimately became the Top 100 were collated from media lists from 77 countries provided by monitoring services, primarily Nielsen Media Research, TNS Media Intelligence and Ibope. Media totals per country were by gross ad rates. *Advertising Age* adjusted each 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-two marketers spent more than No. 100 Shiseido, but lacked the "global" requirement. Four of these were telecom companies, SBC Communications, Verizon Communications, AT&T Corp. and Tokyo-based KDDI Corp. Eight were retailers, including in the U.S., Federated Department Stores, May Department Stores, Home Depot, J.C. Penney Co. and Best Buy Co., two Japanese companies, Aeon Co., Chiba, and Takashimaya Co., Osaka., and one German retailer, Lidl & Schwarz Stiftung & Co., based in Neckarsulm. Japanese companies Suntory,

Osaka, and Kirin Brewery Co. and Asahi Breweries, both Tokyo, had the spending but lacked global coverage.

As it was, Germany, France and the U.K. each were headquarters for nine Top 100 marketers. Japan was home base for 15 and the U.S. for 47.

Because *Ad Age* treats exchange rates on an historic basis, exchange rate mechanics drove up spending outside the U.S. because of the declining dollar. Europe media tallies were abetted by a 9.4% growth in the euro and an 11.8% boost in the British pound versus the dollar. Asia-Pacific was enhanced by the yen's 8.6% growth against the dollar, but also by Japan's return to ad growth in 2004. Japan's total advertising rose 3% in yen (11.4% in dollars), its first increase in four years. Datamonitor predicts Japan will grow at a 2.3% CAGR through 2009.

The rising dollar this year will likely free the Top 100 next year from growth "manufactured" by exchange rate differentials. Growth instead will rely more on increased business from the better international business climate.

### TO REACH US

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## Russia

TNS Gallup Adfact Russia

ADVERTISER	2004	2003	% CHG
Procter & Gamble Co.	\$155.4	\$193.8	-19.8
L'Oreal	63.2	57.1	10.7
Wimm-Bill-Dann Foods	53.0	73.7	-28.1
Nestle	50.4	78.2	-35.5
Unilever	49.3	75.9	-35.1
Mars Inc.	42.4	71.2	-40.4
Henkel	40.2	50.5	-20.5
Danone Group	37.4	32.2	16.0
Cadbury Schweppes	35.0	32.3	8.2
PepsiCo	32.5	40.6	-19.9

U.S. dollars in millions, discounted to reflect AA's estimated negotiated rates.

## Serbia and Montenegro

AGB Strategic Research

ADVERTISER	2004	2003	% CHG
Procter & Gamble Co.	\$23.5	\$21.9	7.2
Coca-Cola Co.	13.2	7.8	69.8
InBev	12.9	5.1	151.9
Telekom Srbije	12.5	2.6	384.4
MB Pivara	10.5	NA	NA
Henkel	8.6	3.8	125.0
Droga Kolinska	8.2	6.9	18.2
Drenik	7.8	7.7	0.6
Carlsberg Breweries	7.7	NA	NA
Tchibo Holding	7.1	2.5	178.7

Figures are U.S. dollars in millions.

## Slovak Republic

TNS A-Connect

ADVERTISER	2004	2003	% CHG
Deutsche Telekom (incl. Eurotel, Slovak Tel.)	\$68.5	\$0.0	NA
France Telecom (incl. Orange)	33.4	19.9	67.8
Procter & Gamble Co.	18.4	10.7	72.5
Nestle	15.9	8.7	81.7
TV Markiza	13.6	6.0	127.2
Henkel	13.2	5.7	132.5
TV Tip	11.6	7.5	54.2
Allianz	10.4	3.0	247.3
Petit Press	10.2	4.8	115.0
Reckitt Benckiser	10.2	4.6	120.1

Figures are U.S. dollars in millions.

## Slovenia

Mediana

ADVERTISER	2004	2003	% CHG
Procter & Gamble Co.	\$19.0	\$15.8	20.2
Reckitt Benckiser	17.4	10.1	71.4
Pejo TrADING	15.6	3.1	400.2
Telekom Slovenije (incl. Mobitel)	12.1	12.4	-2.4
L'Oreal	11.3	11.2	0.2
Henkel	11.0	6.9	60.2
Telekom Austria (incl. Si.mobil)	9.6	11.2	-14.3
Tchibo Holding (incl. Beiersdorf)	9.3	8.5	10.0
Danone Group	6.0	2.7	126.9
Wm. Wrigley Jr. Co.	6.0	3.9	53.9

Figures are U.S. dollars in millions.

## Spain

Nielsen Media Research

ADVERTISER	2004	2003	% CHG
Telefonica	\$134.8	\$146.4	-7.9
Procter & Gamble Co.	125.9	116.3	8.2
L'Oreal	103.3	105.7	-2.3
Volkswagen	101.5	86.1	17.9
El Corte Ingles	90.2	102.5	-12.1
PSA Peugeot Citroen	71.7	80.5	-11.0
Unilever	71.0	83.8	-15.3
Danone Group	70.2	69.7	0.8
Renault	62.0	58.0	6.9
General Motors Corp.	61.7	56.4	9.3

Figures are U.S. dollars in millions.

## Sweden

IRM-Institute for Advertising & Media Statistics

ADVERTISER	2004	2003	% CHG
TeliaSonera	\$71.8	\$44.0	63.4
Royal Ahold	62.9	60.5	4.1
Ford Motor Co.	59.9	45.1	32.7
Unilever	59.0	42.3	39.3
Coop Norden	58.3	55.6	4.9
Procter & Gamble Co.	53.9	50.6	6.6
Svenska Spel	50.8	35.9	41.4
Vodafone Group	45.1	27.9	61.5
General Motors Corp.	39.5	29.9	31.8
3 Mobile Video Co.	38.0	18.2	108.5

Figures are U.S. dollars in millions.

## Switzerland

Nielsen Media Research

ADVERTISER	2004	2003	% CHG
Federation of Migros Cooperatives	\$212.4	\$172.1	23.4
Coop	190.8	169.4	12.7
Swisscom	51.2	55.4	-7.6
Procter & Gamble Co.	45.2	31.2	44.8
Nestle	37.4	29.4	27.3
Tamedia	34.7	36.3	-4.5
Volkswagen	30.1	27.8	8.2
L'Oreal	29.6	27.0	9.6
General Motors Corp.	27.4	18.4	49.5
Unilever	25.9	24.2	7.0

Figures are U.S. dollars in millions.

## Turkey

Bilesim Media

ADVERTISER	2004	2003	% CHG
Procter & Gamble Co.	\$76.2	\$39.1	95.0
Unilever	68.3	71.4	-4.2
Ulker	64.4	45.7	40.8
Coca-Cola Co.	39.9	18.6	114.3
Reckitt Benckiser	30.9	17.7	74.7
Koc Holding	30.9	15.4	100.6
Turkcell	28.3	0.0	NA
ETI	25.7	11.9	115.9
Evyap	25.7	26.6	-3.5
Vestel	21.4	12.5	71.0

U.S. dollars in millions, discounted to reflect AA's estimated negotiated rates.

## United Kingdom

Nielsen Media Research

ADVERTISER	2004	2003	% CHG
Procter & Gamble Co.	\$516.8	\$431.4	19.8
Unilever	414.5	385.4	7.5
COI Communications (U.K. Govt.)	338.8	272.2	24.5
Ford Motor Co.	237.0	224.0	5.8
L'Oreal	224.0	194.8	15.0
DSG International	199.3	164.1	21.5
BT Group	172.5	183.6	-6.0
Volkswagen	171.2	156.0	9.7
General Motors Corp.	162.6	163.4	-0.4
France Telecom	160.0	133.9	19.5

Figures are U.S. dollars in millions.