

switzerland

and its

media scene

index

editorial	3
switzerland	4-5
switzerland in an international comparison	6-7
europa and its media scene	8-9
switzerland and its media scene	10-11
print media in switzerland	12-13
cross media	14
internet	15
radio	16
tv	17
cinema	18
outdoor	19
swiss media research	20-21
sources/links	22
services	23
publicitas promotion network addresses	24

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editorial

Movement in the Swiss Media Scene

The question begs to be asked, «Who does it surprise?» And why shouldn't it move since our media does reflect the structure and use of the current society and those contained within. In this connection, the Swiss are in constant change, as are their neighbours as well. Those who believe that they do not have to change have already lost. This would mean one thing first and foremost for each of the individual media: fewer readers, viewers, listeners and lost relevance in media consumers' daily information supply would consequently result in decreasing importance in the advertising industry.

Print: Modern tradition - traditionally modern

How good it is that Swiss media firms have anything but an innovation jam. In the lead, print media: There is hardly a large publishing house which has not subjected at least one of its premium titles to a smaller or larger revamping. Reader-friendliness is at the fore. It is also often now easier to get started reading, through summaries and «News in Brief». Is this a tribute to our changing reading behaviour since the appearance of free newspapers? Be that as it may, the fact is, free newspapers in Switzerland celebrate success in German-speaking Switzerland and recently in French-speaking Switzerland as well. Through them, with regard to the population, even the number of «readers» has increased over the whole of Switzerland, despite the fact that a few titles have lost coverage as a result. Yes, even many promising new launches are taking place in the print market. And there is also the notion that there are new combination possibilities for existing titles. In the future, how this will effect the reader market will no longer only be presented once a year by MACH. As of 2006, readership figures will be collected semi-annually thereby providing greater transparency.

In addition, various print titles have made efforts to carry out a tariff reform to cover all media types. However, with about 2,700 print products, it is not surprising that this solution could not uniformly be put into action. Nevertheless, a few publishing houses in the course of the reform have introduced to some extent new formats and/or have brought down their prices, especially also in the (four)colour area. Print as an approach has therefore become cheaper! The advertising market is still waiting, however, to find a single common black/white and colour tariff throughout. Who knows where the journey will still take us. A «single tariff» irrespective of colour remains a dream.

Media multitasking

Press products continue to be a Swiss favourite. Based on the European average, television consumption is relatively small. Nevertheless, most of us have been using all available media for a long time already; we have all long since become «multi-taskers», i.e. we often consume simultaneously. Or to put it another way, an urge seldom arises on its own. Movement can thus be felt from all places in order to win attention.

Foreign television and radio channels have been present in Switzerland for a long time with their own «advertising windows». Alongside classic spots, new advertising possibilities are being looked for in TV by private as well as public channels. In order to

facilitate planning, TV marketing is based on the Swiss version of the well-known «Sinus Milieus» implemented in Germany. Interestingly, this consumer definition based on the different milieus of society is not applied to other media.

Recently, a small revolution has taken place in cinemas: Digitalisation of cinema advertising allows for flexibility which was up to now never possible and helps to dispose of the «role» of at least advertisements in this nostalgic sector.

An interesting development can also be seen in the Outdoor sector. Outdoor advertising on offer is increasing and as a result the ability to measure and plan is also growing. A new independently surveyed study on this topic is in preparation.

SMS and MMS services are the newest players after the Web and also – or precisely – serve the consumer's need to be permanently in contact with the environment and well-informed while continuing to be mobile. Going on-line via the mobile is a reality, and only the current functions of our mobile devices place a limit on what is feasible.

Farewell to the stationary

Thus the greatest challenge then also lies in being able to even just get your own message through to the media user. And by that time, it may not be clear whether your message has to do with information, entertainment or advertising, if these differences still even apply today or are perceived as such. And the further increasing media fragmentation does not make this task any easier.

Unfortunately, no study has yet been done from an advertising point of view which could function as a planning tool to cover all media types. Intermedia comparisons are still not possible, although a step in this direction was already made several years ago in Switzerland with MA Strategy.

«Cross media» interconnected campaigns have been possible in theory for some time now. It would be nice if we could see them put to practice more often.

Ultimately everything in this connection has one goal: Getting closer to the customer and meeting his needs even before he has realized that these needs exist.

Big little Switzerland

It may well be that Switzerland is smaller compared to its neighbouring countries. In view of its media diversity, it is big and sometimes even a little difficult to survey. To give you a first glimpse, we offer you this brochure and hope that you will find much that is new and of interest within its pages.

We will be happy to assist you in word and deed along your great exploration trip.

Sincerely

Alexandra Kasper
Managing Director
Publicitas Swiss Press

switzerland

Switzerland – a country of exceptions

Switzerland is full of various surprises and not only with respect to its scenic and touristic attraction. This federally governed country has four official national languages. The population is divided into the different language groups: German (63.7%), French (20.4%), Italian (6.5%) and Rhaeto-Romanic (0.5%). The remaining 9% «other languages» of the Swiss population is made up of a colourful mix of languages. The percentage of foreigners in Switzerland is high at 21%, however, this figure must not be misinterpreted. With an obligation to traditional morally ethical values, Switzerland has a liberal attitude towards victims of political persecution and therefore a high immigration quota. However, many people of second and third generation born in Switzerland who do not hold a Swiss passport count as «foreigners» and in the meantime have formed a solid social group known as «Secondos».

Although it is embedded in the geographical heart of Europe, Switzerland is not a member of the European Union, a fact, however, which does not prevent it from being one of the economically strongest countries. Unlike commonly assumed, five

of the seven million inhabitants live in cities and urban areas of concentration with the typical phenomenon of high numbers of single households. By far the largest area of concentration is the Greater Zurich area, followed by Geneva in the French-speaking part of Switzerland and Basle at the tri-country border to Germany and France. Zurich is considered the financial capital of Switzerland and also ranks high in the financial world internationally. Geneva is the headquarters of various international organisations and the domicile of world-famous luxury watch manufacturers. Basle, on the other hand, has been a leader in the pharmaceutical industry for years. As a result of its financial strength, Switzerland with its internationally active companies is attractive to employees far across the country's borders, enabling it to maintain its innovation strength. Even art and culture are not neglected: The «Art Basel» has succeeded in establishing a reputation for itself far beyond the country's borders. The film festival in the charming town of Locarno in Ticino and various music festivals of all types of music attract regular audiences from around the world every year.

Population Structure

Resident population 7.4 million

Sex	male				female	
	49%				51%	
Age	0–19 years old	20–39 years old	40–64 years old	over 65 years old		
	22.1%	27.7%	34.3%	15.8%		
Housing	urban / agglomeration			rural		
	73%			27%		
Nationality	Swiss			foreigner		
	79%			21%		
Education	obligatory education	apprenticeship / vocational education	secondary school graduate / professional secondary school graduate	professional higher education, college	university	
	Men	18.4%	40.6%	10.7%	17.2%	12.9%
	Women	25.8%	42.9%	16.6%	7.2%	7.4%
Households	single person households			family households with children		
	1,120,900			1,059,600		

Source: Federal Office of Statistics 2005

Top Ten Economic Areas

Personal disposable income per capita 2004

Economic area (EA)	Income (euro)
EA 11 Geneva	40,462.0
EA 24 Zug	33,714.3
EA 43 Zurich	29,856.5
EA 31 Basle	26,437.9
EA 41 Aargau	23,917.1
EA 34 Berne Midlands	23,870.1
EA 27 Glarus	23,278.3
EA 12 Waadt	23,235.0
EA 51 Ticino	22,793.5
EA 44 Thurgau	22,721.3

Source: DM-Plus 2005

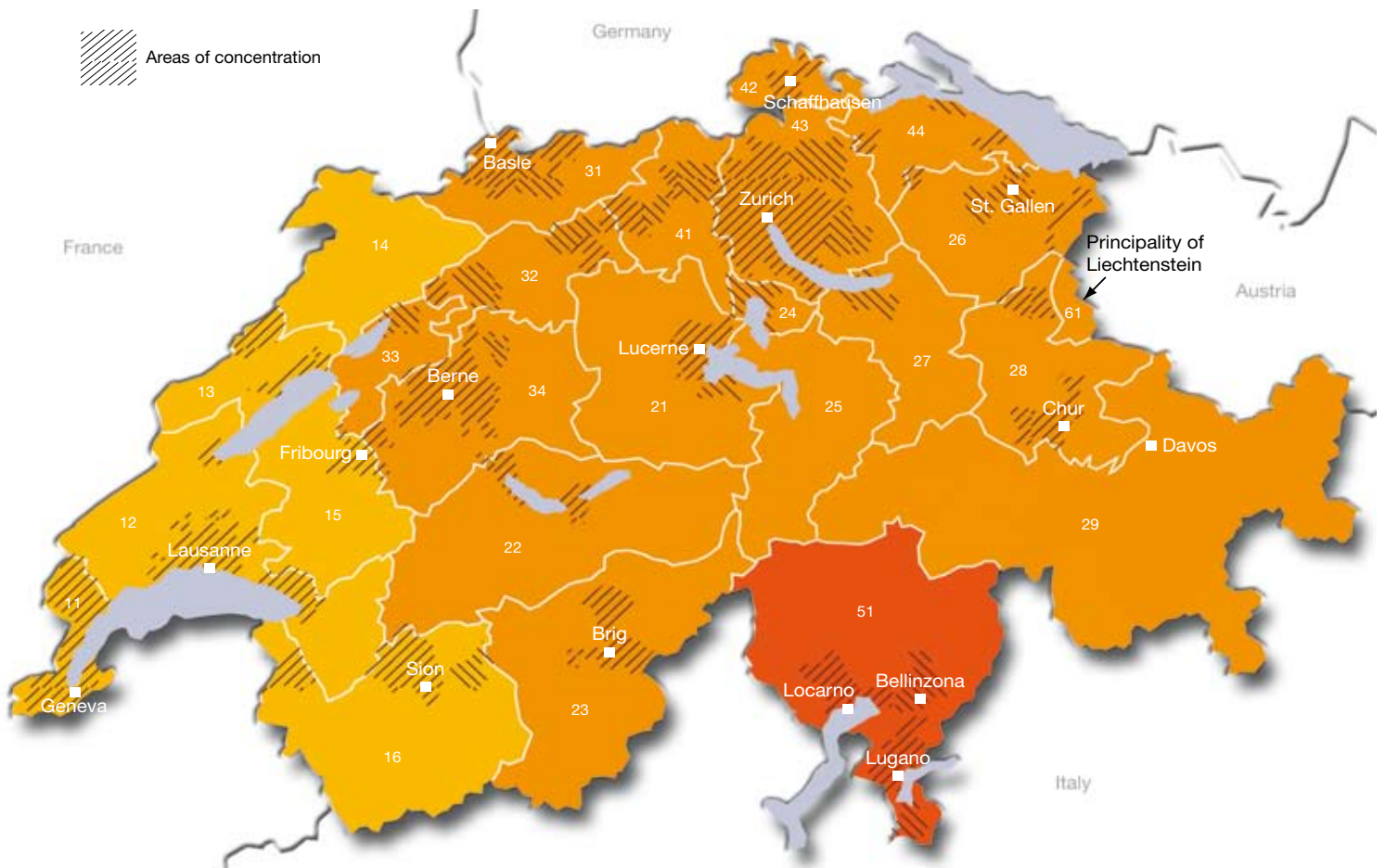
Top Ten Areas of Concentration

(as of 2003)

Area of concentration	Permanent resident population
Zurich	1,081,700
Geneva	484,500
Basle	484,100
Berne	342,900
Lausanne	304,800
Lucerne	197,500
St. Gallen	145,500
Winterthur	125,900
Lugano	124,400
Baden-Brugg	108,400

Source: Federal Office of Statistics 2005

Division of Economic Areas according to WEMF (AG für Werbemedienforschung)



Source: UBS Switzerland in Figures 2005

■ German 63.7%
 ■ French 20.4%
 ■ Italian 6.5%
 ■ Rhaeto-Romanic 0.5%
 ■ other 9.0%

switzerland

When David is Goliath

Perhaps Switzerland's strength lies precisely in the fact that it does not belong to the «biggest» in Europe in terms of geography and therefore takes particular care of the features which make it special. Comparisons are difficult. Should one, however, make an attempt, the following can be concluded: On a surface area which could fit five times in Great Britain and seven times in Germany, and with a population equal to only an eighth of that of Britain and a tenth of that of Germany, Switzerland still has a distinctly higher level of per capita disposable income. Although the unemployment rate has increased slightly over the past few years, at present it stands at about 3.9% making it the lowest rate in a European comparison. According to these and other ratings, Switzerland has practically undisputedly held its top position in terms of credit rating for years.

Good opportunities for earning money and a moderate tax system lead not only to high gross salaries in Switzerland but also an interesting amount of disposable net wages. Zurich can clearly hold its own to New York. The next European cities, Brussels and London, are behind at just the fourth and fifth positions. As a result

of higher gross earnings and more comfortable net earnings, among the world's cities with the highest domestic purchasing power, four Swiss cities from all three parts of the country are found in the «Top Five» at the same time: Zurich, Basle, Geneva and Lugano. Only Luxemburg could be placed just after Zurich and Basle in third position.

However, the high purchasing power has its price: hardly any other country has a higher price level than Switzerland, not even Japan. With a Swiss index value of «100», the industrial power which lies the farthest down is the USA at a mere «71».

When looking at individual cities, Zurich is however no longer the most expensive. Oslo is at the top in this category (rent not factored in). When including rent, the citizens of the British metropolis of London spend the most. All four Swiss cities are however also in the «Top Ten». The image of the well-paid Swiss is therefore confirmed but a considerable part of their earnings must be spent to cover their living costs.

Switzerland in an International Comparison

	CH	DEU	FRA	ITA	AUT	GBR	BEL	SWE	NLD	USA	CHN	JPN
Surface area in 1000 km ²	41.3	357	544	301.3	83.9	243.8	32.5	450.3	41.5	9'809.2	9'561	377.8
Population in millions	7.5	82.5	59.9	57.9	8.1	59.7	10.4	9	16.3	293.7	1'300	127.7
Residents per km ²	178	231	110	192	97	245	342	22	392	30	136	338
Unemployment rate in %	3.9	9.5	9.6	8	4.5	4.6	8.4	6.3	4.7	5.5	4.2	4.7
Gross domestic product in billion euro	289.4	2,179.9	1,621.3	1,353.2	235.4	1,713.3	288	264.4	466.9	9,406.9	1,330.2	3,776.1
Gross domestic product in ths euro/pc	38,809	26,413	27,066	23,375	29,012	28,722	27,579	29,399	28,720	32,034	1,024	29,573
Swiss imports in billion euro from	---	29.2	8.7	10.1	3.8	3.1	2.5	1.1	4.4	3.7	1.9	1.8
Swiss exports in billion euro to	---	18.9	8.0	7.8	3.1	4.4	1.7	1.1	2.8	9.3	1.9	3.5

For exchange rate, see page 22

Discrepancies due to rounding off differences possible

Sources: UBS Switzerland in Figures 2005; NBB, Belgium National Institute of Statistics; SCB Sweden Statistics; Eurostat

Credit Rating

Global rating		Index value
1	Switzerland	94.5
5	Great Britain	92.7
6	USA	92.4
7	France	92.2
8	Netherlands	92.0
10	Germany	91.8
11	Sweden	91.6
12	Austria	91.2
16	Belgium	89.0
	European Union (25 countries incl. east expansion)	85.8
19	Japan	84.4
20	Italy	83.6

Source: Institutional Investor March 2005

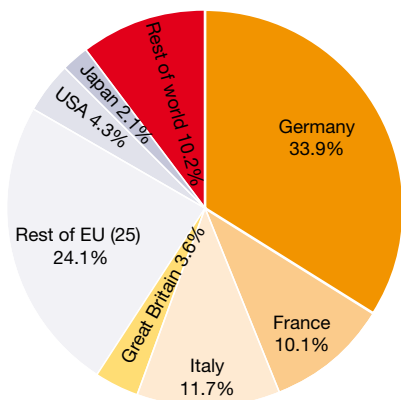
in an international comparison

Trade partner Switzerland

After several years of relative stagnation, 2004 saw Switzerland able to once again record increasing figures in imports as well as in exports. In terms of quantity, at 46 million tons, Switzerland's imports are triple the amount of its exports. The foreign trade balance, however, shows a profit of some 6.2 billion euro. Consumer goods account for most of the imports (about two thirds), and the profit on exports is explained by the approximate 50% share of luxury goods and pharmaceutical products. What is most impressive is the value share of Swiss watches: Although only 5% of the world's watch production is carried out in Switzerland, this share has a value of over 50% of the total of this industrial segment.

Within the European Union, Germany is and remains Switzerland's strongest trade partner for exports as well as imports, closely followed by France and Italy. On the other hand, Switzerland is just behind the USA in its position as the most important export market for the EU. Moneyed classes of Swiss ready and willing to consume are still a good sales market. EU imports from Switzerland, however, are only at fifth place. The USA continues to hold first position, yet, the emerging economic power, China, has been continually moving up over the past few years.

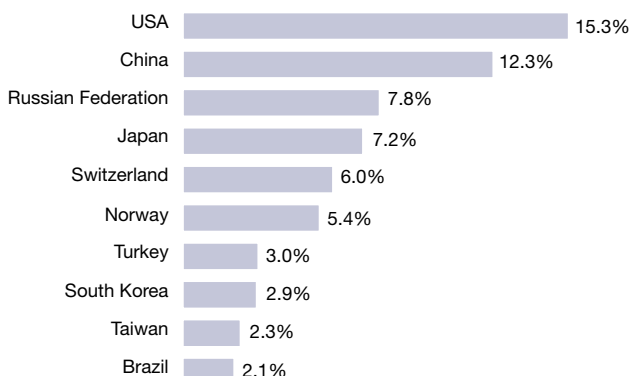
Swiss Import Markets 2004



Source: Swiss Customs Administration 2005

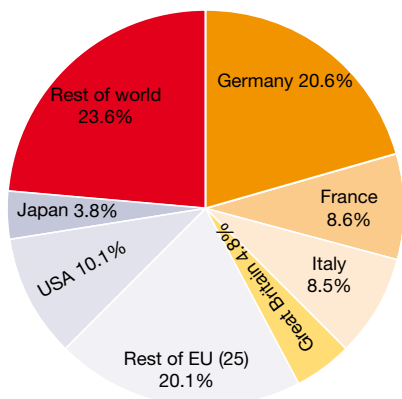
Major EU Import Markets 2004

(EU 25 incl. east expansion)



Source: Eurostat 2005

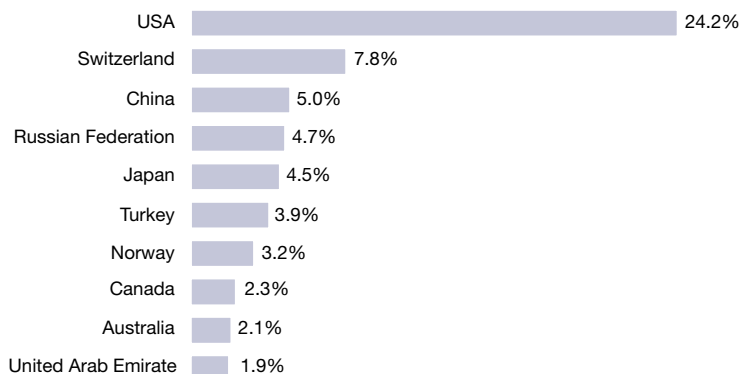
Swiss Export Markets 2004



Source: Swiss Customs Administration 2005

Major EU Export Markets

(EU 25 incl. east expansion)



Source: Eurostat 2005

Europe and its

National identity

Despite globalisation, cultural differences within Europe still exist. One intuitively assumes that this fact is also reflected in media consumption. However, this is very difficult to substantiate as country-specific studies show there is, for the most part, very little in common regarding question formulation or survey type. With the help of new statistics programs, it has now been ascertained that there are in fact four groupings in Europe which are clearly distinguishable from one another and yet demonstrate homogenous behaviour. Unfortunately, non-EU membership is a disadvantage here for Switzerland since what is often understood by the term «Europe» is political and not geographical. If we analyse the media on offer of the individual countries,

media preference and media consumption go hand in hand, as is naturally expected, with the number of media available in the respective country. In terms of media on offer, «little» Switzerland can hold its own in absolute numbers, even if it is not the front runner. If we calculate the media on offer per person, Switzerland is practically unbeatable.

The media coverage study of the different media types within the countries is further confirmation of cultural peculiarities. It is no surprise therefore that there is a difference in the distribution of advertising expenses per media type. In the latest survey, Great Britain holds the first position with about 16.5 billion euro, closely

Media On Offer

	CH	AUT	BEL	FRA	DEU	ITA	NLD	SPA	SWE	GBR
Newspapers	445	212	33	496	1'666	99	635	302	209	660
Magazines	2,209	2,866	650	4,191	5,835	2,782	946	3,147	507	8,338
Outdoor	114,500	72,000	22,868	483,000	340,580	198,300	38,000	128,443	38,881	108,336
TV stations	14	13	22	6	14	8	14	12	*	*
Cinema	539	577	429	5,295	3,914	3,346	602	3,250	590	3,479
Radio stations	55	74	320	1,200	331	2,525	113	4,144	122	294

Cinema: number of theatres

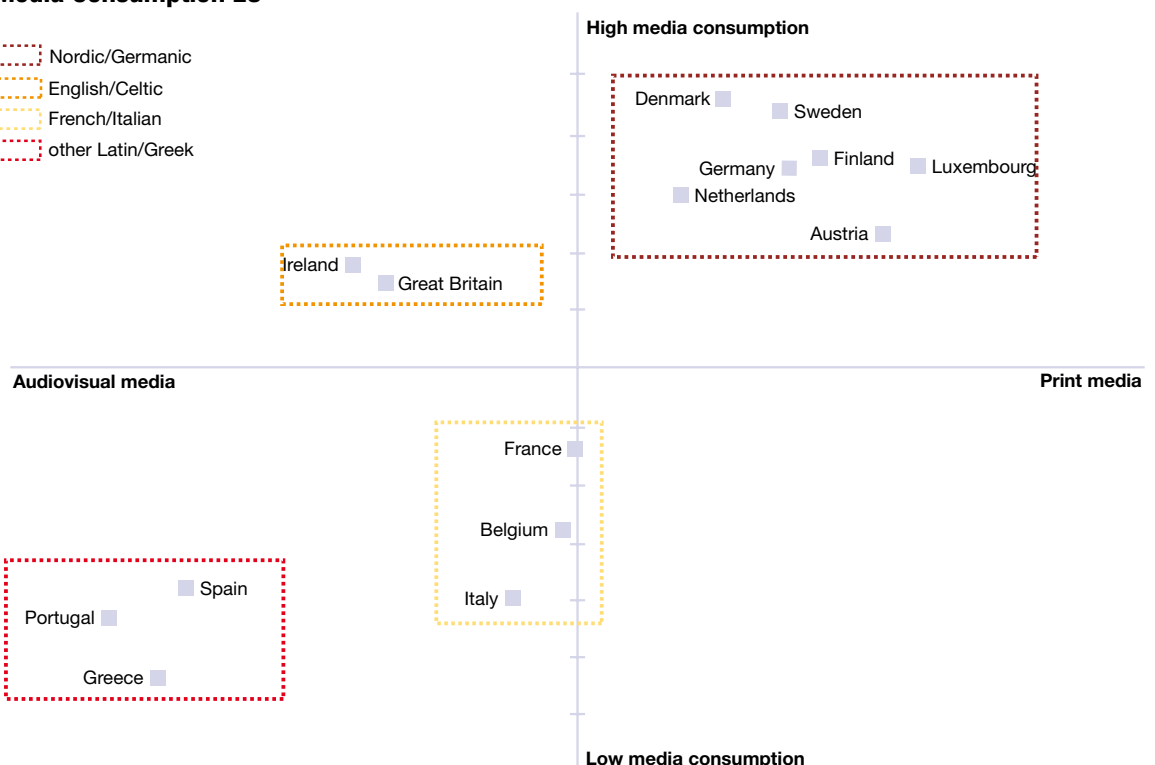
Newspapers: dailies, weeklies, free papers

* no data

Sources: World Press Trends 2005; Western Europe and MediaFact 2005; gwa Mediaplanner 2005; European Marketing Pocket Book 2005; EGTA-Baromètre 2004

Media Consumption EU

- Nordic/Germanic
- English/Celtic
- French/Italian
- other Latin/Greek



Switzerland not surveyed

Source: nVision Europe 2003

s media scene

followed by Germany with about 16.2 billion euro, of which 40% flows into newspapers. Southern countries invest about 50% in TV advertising, while Sweden places about the same percentage in newspapers and the highest portion in online advertising. As is to be expected, Switzerland also presents itself as a strong print country. Remarkably, however, a high percentage flows into poster advertising, an approach comparable to that of France.

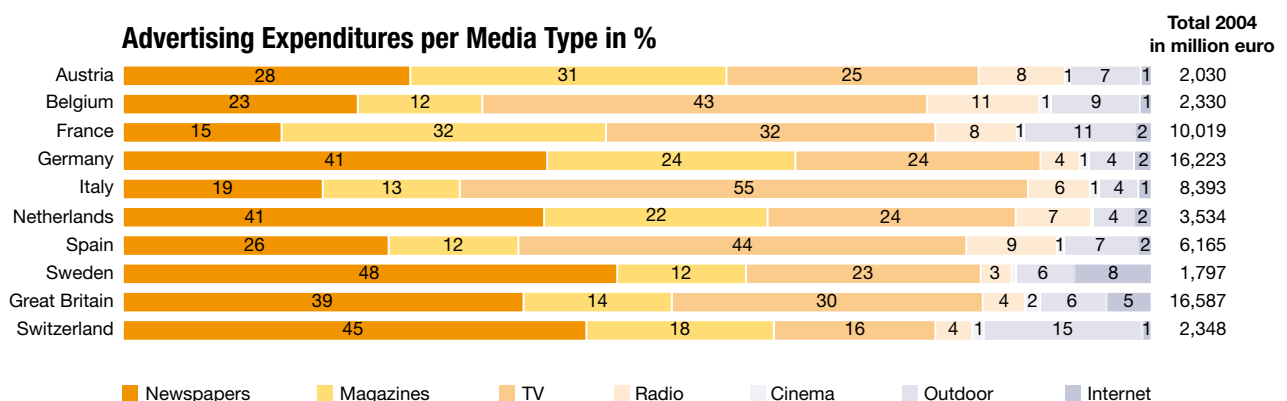
Daily Coverage of Media in %

	TV	Radio	Newspapers	Magazines	Internet
Austria	71	84	75	82	47
Belgium	92	74 *	52	92	36
Denmark	77	83	82	98	63
France	82	83	45	96	41
Germany	75	79	76	93	57
Italy	83	68	41	67	49
Netherlands	78	94	79	97	67
Spain	90	58	41	54	34
Sweden	72	77	79	92	75
Great Britain	72	n/a	63	77	59

* only Flemish region
Switzerland not surveyed

Sources: WARC, national survey data; Nielsen NetRatings

Advertising Expenditures per Media Type in %



Source: Western Europe Market and MediaFact 2005

switzerland

Interested, informed and engaged

In Switzerland, federalism and language diversity have led to an above-average amount of what can be found on offer in all media. The high number of special-interest and hobby magazines is explained primarily by the existence of four national languages which results in the multiplication of specialized titles. The high number of newspapers, however, is essentially connected with the strong anchoring of the local and regional press in the population. Alongside large cross-regional media, news coverage of the direct surroundings of the Swiss has a long tradition and symbolizes basic democracy, so that even the «large» daily newspapers set value on their anchoring in local areas. In many cases, Swiss media firms are not only involved in print and on-line markets but also in local radio stations and to some extent even in local television channels. Apart from activities of international publishing houses in Switzerland, there is also active

commitment abroad by Swiss publishers through which the latest trends are blended with proven tradition.

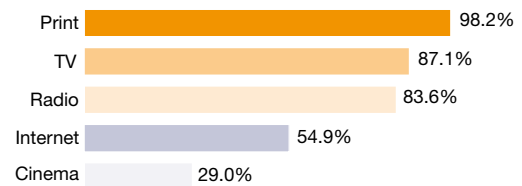
With the high number of print products, it is no wonder that in the whole of Switzerland, print is far ahead in terms of media consumption. Nevertheless, half of all Swiss are now regular users of the Internet. If we consider the higher social class, print consumption remains stable at nearly 100%, and the percentage of those who use the Internet is increasing significantly. In terms of media consumption, TV falls from second to fourth place, while cinema rises to over 40%.

Swiss Media On Offer

Daily press	105
Regional weekly press	334
Sunday press	6
Consumer magazines	45
Financial and business press	22
Special-interest press	1,121
Trade magazines	1,021
Total print titles	2,654
Language regional TV stations	10
Regional TV, total	16
Language regional radio stations	13
Local radio stations, total	40
Cinema theatres (with advertising)	465
Billboards	114,500
Websites, relevant to advertising	210

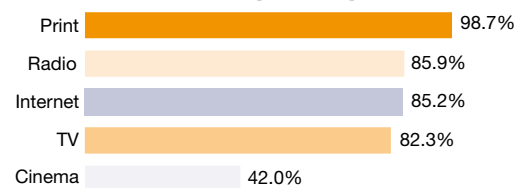
Sources: Radiotele; VSW Verband Schweizer Werbegesellschaften; Cinecom; publisuisse; APG; web2com

General Media Consumption



Universe: Total population 14+: 5,717,000
Source: MA Strategy 2005

Media Consumption Top Social Stratum



Universe: People with a high level of education and an income over CHF 8,000: 841,000
Source: MA Strategy 2005

and its media scene

Advertising investment according to sector

Despite slight changes over the past few years in terms of percentages, press with all its different products remains the media in which the most advertising monies flow. However, with the increase in Internet platform use (especially in classic classified ad markets), investment amounts of former years are no longer reached even in Switzerland. As is the case practically every year, there have been shifts within the sector ranking. While consumer goods has made its way to first place, media has fallen to twelfth after just having held the lead position in 2003. Worth noting is that of all the top sectors, consumer goods is the only one which has invested the main part of its budget on TV. In terms of absolute figures and not percentages, the biggest client for online is the telecommunications sector. In the meantime, online advertising has already surpassed that of Teletext and trade magazines and has nearly caught up with cinema.

Help with deciding on media type

Changing social modes of behaviour and changing media consumption go hand in hand, both in terms of what concerns the media in use as well as the duration and possible time of day of the consumption. MA Strategy offers advertisers in Switzerland help with the analysis of the diverse variations of media consumption. This study, unique in Europe, makes it possible to define a „narrow user group“ for each advertising medium. This can help when choosing the appropriate media type before the selection of a particular medium within the media type is considered.

Branch Advertising Investment 2005

January 2005 - December 2005	Media mix in %									
	Total in 1000 euro	NP	GM	TM	TV	RA	CI	TXT	BB	IN
Branches										
Consumer goods	511,179	10.7	24.3	0.2	49.7	1.0	2.5	0.0	11.3	0.3
Classifieds	377,387	99.1	0.8	0.0	0.0	-	-	-	0.0	0.1
Transport	231,875	49.1	15.2	0.7	14.8	4.8	1.1	0.2	13.2	1.0
Commerce	228,304	52.4	20.6	0.1	14.3	2.5	0.5	0.0	8.8	0.7
Culture / Leisure	201,055	33.0	16.6	1.9	20.2	7.5	0.8	1.9	17.1	0.9
Finance / Insurance	186,599	44.3	22.1	0.2	15.1	1.3	1.6	0.6	12.9	1.9
Entertainment electronics / Photo / Watches	124,190	48.1	19.6	0.2	18.9	3.9	1.2	0.0	7.3	0.9
Telecommunications	120,324	36.7	10.9	0.1	26.0	3.2	1.8	1.0	15.7	4.5
Living / House	105,107	39.6	28.4	1.4	16.3	7.6	-	0.0	6.4	0.3
SMB companies / Bargain buying customers	71,781	46.2	9.8	3.8	0.6	2.2	7.4	0.4	27.6	1.8
Clothing	69,800	34.4	22.7	0.0	15.6	2.5	1.7	0.0	22.9	0.3
Media	66,031	34.0	25.4	1.1	23.6	6.2	0.9	0.8	6.7	1.4
Administration / Politics	62,165	35.1	9.2	0.3	26.2	2.7	1.6	0.5	23.6	0.9
Office / Informatics / Internet	44,240	49.3	20.2	3.5	15.9	1.9	0.4	0.0	2.3	6.5
Services	29,826	35.6	6.3	0.7	30.0	4.3	0.1	8.6	9.4	5.0

NP = Newspapers, GM = General interest magazines, TM = Trade magazines, TV = Television, RA = Radio, CI = Cinema, TXT = Teletext, BB = Billboard, IN = Internet

Source: AIS

print media

Undisputed number one

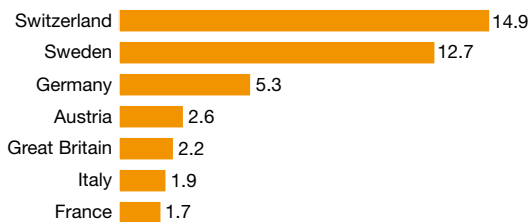
The importance of print in Switzerland is easily illustrated in a comparison of European countries: No other country has a greater newspaper density. Even the Swedes have a smaller newspaper density per person and Germany doesn't even have a third as many newspapers. Magazines is the only area in which Switzerland is beaten by Austria, but it still ranks higher than all other European countries. However, Switzerland does not only stand out for this; on average, the Swiss spend 47 minutes reading their newspapers. This puts them just behind the Norwegians and Finns, but 7 minutes in front of the fourth place Irish and Dutch. And the Danish spend only just about a half hour on their newspaper reading. The reason the extent to which the market for mostly subscribed print media is so high for the Swiss also has to do with the fact that the Swiss are a nation of public transport commuters. At least two thirds of the Swiss regularly

commute to work and school. This also explains, among other reasons, why Switzerland has seen a sharp increase in commuter newspapers, which, with their new layout, have brought young readers back to newspaper reading in addition.

The high newspaper density is also explained, however, by the fact that when looked at in relative terms, few titles have a circulation of over 50,000. This has to do, among other reasons, with the numerous languages spoken in Switzerland. From this multitude of print products, titles have united to form various combinations in Switzerland in order to simplify planning. In some cases, regional areas are made larger with the combinations; in other cases, the combinations serve to also unite certain socio-demographic reader groups beyond language areas.

Newspaper Density

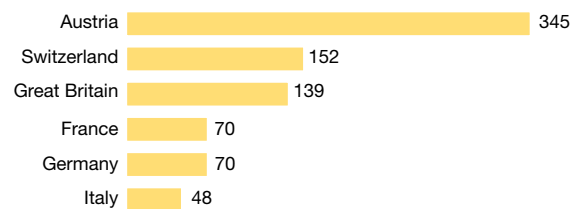
Daily newspapers per million inhabitants



Source: WAN 2005

Magazine Density

Magazines per million inhabitants



Source: Fipp 2005

Time Spent Reading

Average newspaper reading time per day in minutes

Norway	49
Finland	48
Switzerland	47
Netherlands, Ireland	40
Germany	36
France	31
Great Britain	30
Austria	30
Sweden	29
Denmark	28

Source: World Association of Newspapers/Ipra out of W&V compact

Circulation Breakdown of Swiss Newspapers

Number of titles per circulation category

from 50,000	60
20,000 - 49,999	109
to 19,999	276

Source: Katalog der Schweizer Presse 2006

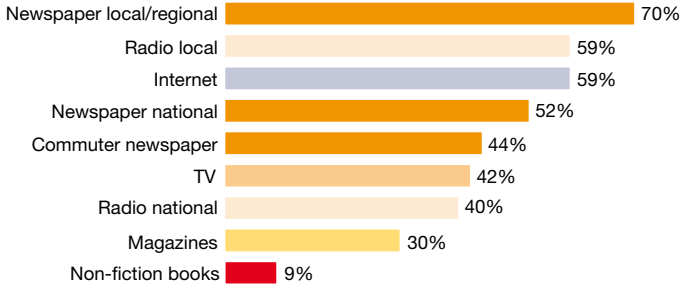
in switzerland

Advertising is a matter of confidence

One of Switzerland's particularities is the high number of so-called «stop-stickers» or «no advertising» stickers on mailboxes which make it impossible for unaddressed direct-distribution advertising to penetrate households. The more urban a region, the higher the number of «refusers» of unaddressed mail; the more rural the area, the less disturbing advertising in mailboxes is felt. In comparison with this, local and regional newspapers, in particular, are considered an essential part of Swiss daily life: more than 70% would not give up their newspaper as their information source. On the other hand, more than 50% view TV and particularly radio as entertainment media, and it seems they could do without them as information sources. 77% of those surveyed consider advertising on TV disturbing, while advertising in the newspaper benefits from the trust which the newspaper enjoys and is therefore even perceived as information itself. Surprisingly,

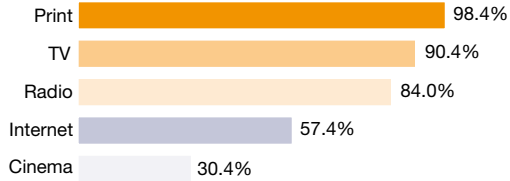
Internet advertising is viewed as a source of information by only about two thirds of the population, even though the Internet medium promotes itself strongly as a source of information.

Indispensable Media



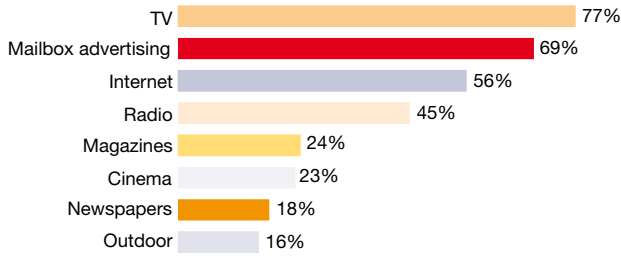
Universe: Media which you can not do without for daily information and guidance.
Source: D&S out of Media Trend Journal

Information through Advertising



Universe: Through advertising I am made aware of interesting products, new ideas more frequently: 1,955,000
Source: MA Strategy 2005

Disturbance through Advertising



Source: ERASM

Refusal of Non-Qualified Direct-Distribution Advertising

Highest density of stop stickers

Economic Area with number of mailboxes		%
24 Zug	54,319	54.9
43 Zurich	830,944	53.3
31 Basle	303,872	51.2
26 St. Gallen	195,967	43.8
28 Grisons Lowlands	75,812	40.7

Source: Stoppkleberanalyse 2005

cross media

Cross media is the talk of the town

Despite Switzerland's print load, one should not have the impression that other media have no relevance in a Swiss campaign's choice of media and media mix.

On the contrary, with advertising budgets decreasing over the past few years, faced as well with the changing «media» consumption behaviour, not only the pure media mix but also more and more interlinked campaigns or «cross media» campaigns are rising in interest. It is necessary to reach the consumer through diversely interconnected ways and to invest advertising monies to produce the most profit. Different media which convey the same message and which refer to each other reciprocally, can benefit from the strengths of each individual medium. The traditional preferences of print media complement one another with the potential digital interactive media. What is of central importance is the consumer and the question of when and how they can be reached in a way in which the message is also received. Quotas are much less in demand than are the relationships of consumers towards the individual communication channels.

As a result of this new approach, the traditional customer-agency model has changed. The decision concerning which medium is best suited to optimally reach the target group is moved forward in the planning process and influences the design.

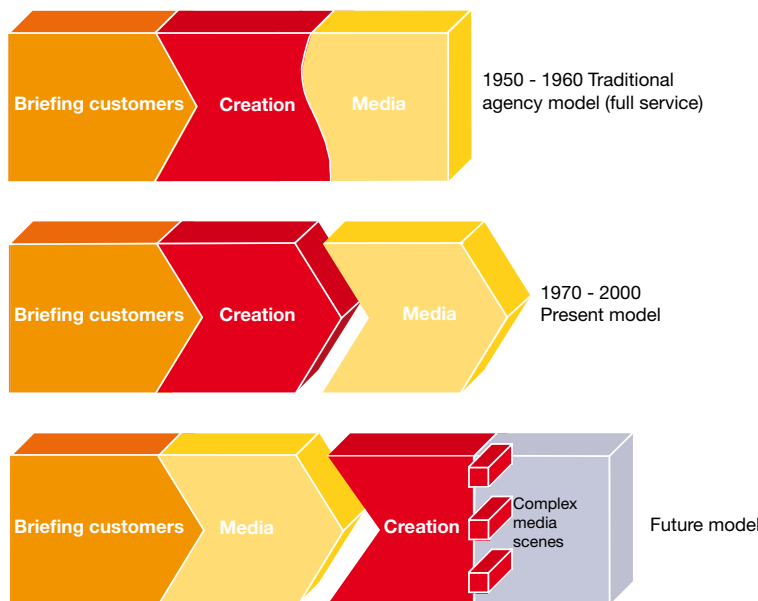
Media-Mix ≠ Cross media

However, this method of approach, even if it is the talk of the town, suffers a bit in that there doesn't seem to be a uniform definition for it and there are no verifiable standards. To put it in simple terms, cross media can be described as «interconnected communication», whereas there is a clear definition for «media mix». In cross media campaigns, generically-termed target groups are taken from one medium to another, as opposed to running a single campaign activity parallel in the media. Cross media may be regarded as the answer to the changing (media) behaviour of consumers.

In order for cross media to be considered more than just another discount possibility, there is a need for extensive experience on both the part of customer and supplier as well as a telling number of hard facts. No other planning tool has yet succeeded in making it possible to compare different media using a standard currency. As a result, media planners will be presented with completely new tasks to carry out.

True cross media campaigns require a great deal of planning accuracy and knowledge and therefore may not be more favourable in terms of cost but rather more intensive.

Higher Rating for Media Planning



Media-Mix Campaign



Example media

Print Advertisements
Online Advertisements
Cinema

Interlinked Campaign



Source: Online-Media-Planer 2005

internet

Internet use continues to increase

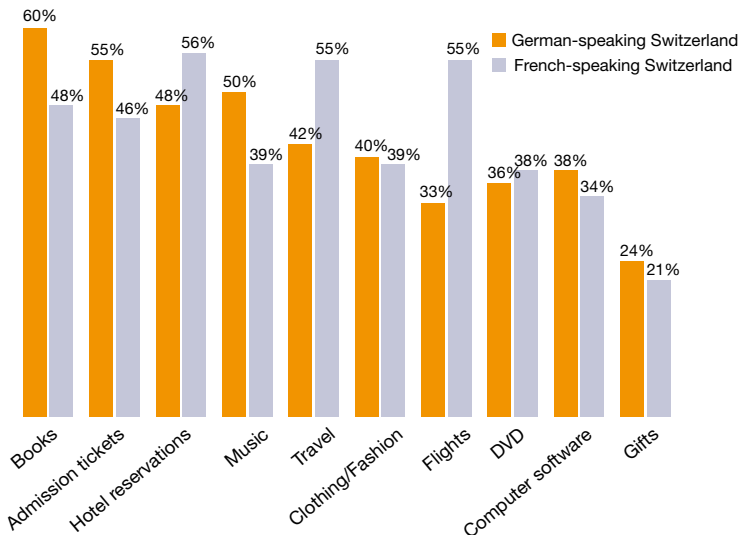
Switzerland has over 2.5 million Internet users daily. This figure has nearly doubled since 2001, while it is true that access ways are becoming more and more diverse.

In 2004, there were 1,285,000 people connected to the Internet via broadband; today the figure is already at 1,713,000. Thanks to the increasing spread of fast Internet connections, the Internet is gaining further importance in Switzerland also as an advertising channel. Thanks to the high broadband coverage, new formats can be easily forwarded to households. Broadband users are the most enthusiastic Internet consumers - this well-founded assumption has now been substantiated with concrete figures by the British research institute «Continental Research». Accordingly, consumers who are connected to the Internet via ADSL, cable or another high speed connection, are much more eager to spend than those who enter the World Wide Web via a modem. This is also seen in the purchases made by users via the Internet in 2005 in Switzerland. Approximately 13% of users spend over

CHF 2,500.- annually on the Internet! And the trend is increasing. In terms of percentages, the purchase of books is in the lead, followed closely by all types of purchases in the areas of travel and leisure.

As a result of the broadband hype, the online platforms of print titles are being used more and more for advertising. This is not surprising as Switzerland does have a high press load. The year 2005 saw more than two thirds of all advertising expenditure booked to offline print titles. Online platforms can benefit from the added bonus of trust demonstrated in print products. Naturally, the combination of print and online media is at the forefront due to the particular closeness they share in editorial content – a fact which is also attractive for international advertising customers. The print combinations already in existence are also joining up more and more to form online pools. The development of such simple online print pools will be further intensified in the future.

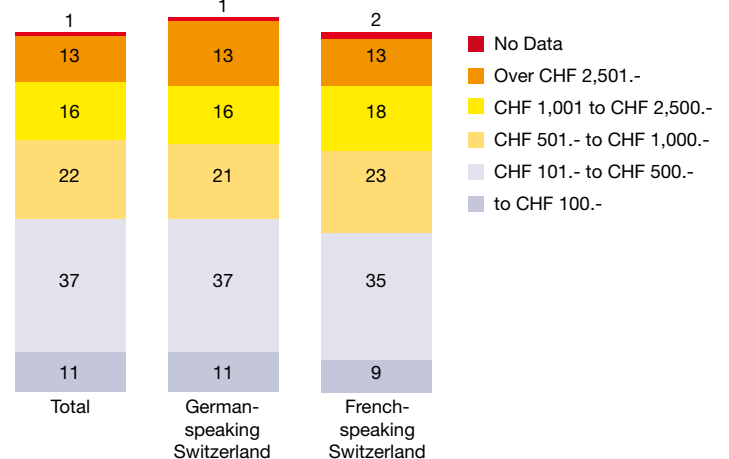
The Most Sold Products on the Internet



Universe: People who shop on the Internet: 2,581,000

Source: MA Comis 2005

Expenditure on the Internet



Universe: People who have made a purchase on the Internet within the last 6 months: 2,289,000

Price example: 100 CHF = 65 euro

Source: MA Comis 2005

radio

Switzerland and its radio scene

The Swiss radio scene is diverse. Alongside numerous foreign stations, the public radio station SRG SSR idée suisse is struggling together with the private commercial stations to obtain the favour of listeners.

Due to its attractive advertising environment, Switzerland is exposed to a high radiation of foreign broadcasting stations. Private radio stations consider themselves particularly at a disadvantage compared to foreign competitors who with their «advertising windows» are not subject to the strict Swiss advertising regulations purported by the parliament and adhered to under radio and television law (RTVG).

Public radio station

With 13 stations, SRG SSR idée suisse fulfils its stipulated performance mandate to cover the whole of Switzerland in geographical terms. These radio programs can be received over terrestrial frequencies as well as cable and are aimed at different target groups. In all parts of the country, the first program (DRS 1, La Première, RSI 1) contributes considerably to the leader position.

The radio stations of SRG SSR idée suisse, however, serve the communication branch as an advertising medium in only a very restricted way and are financed predominantly by licensing fees.

Radio advertising in public programs is generally forbidden. These programs can only serve as an advertising medium for sponsoring purposes.

Commercial, private radio stations

With the licensing of the first commercial private radio station in 1983, SRG SSR idée suisse lost its radio monopoly.

Although private radio stations as a group also cover the whole of Switzerland in geographical terms, they are referred to as regional or local radio stations due to their technical broadcasting range. Unlike public stations, all private stations can book advertising and sponsoring. On the other hand, lucrative private radio stations must (still) do without licensing fees.

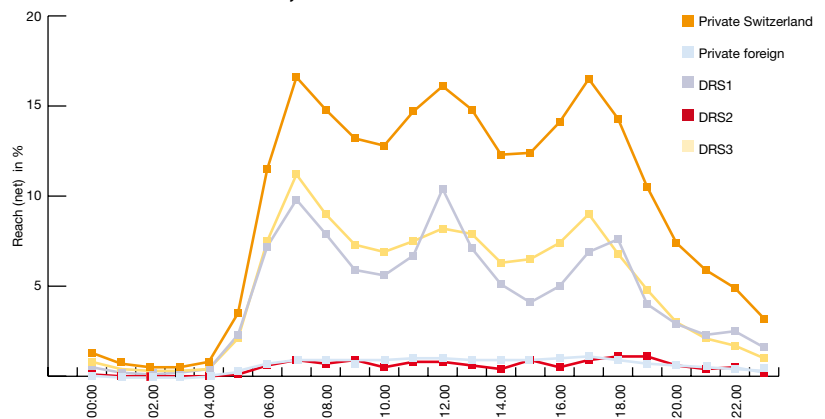
Swiss private radio stations can be booked individually and also in various larger and smaller advertising pools. Regional, non-local and also national coverage are possible with pool bookings. Foreign stations are integrated within these advertising pools.

In Switzerland, radio is an up-to-date, informative, entertaining and – according to listeners' surveys – also a very credible medium which is particularly successful as a sales medium in national campaigns in a media-mix with TV advertising.

Radio Stations in Switzerland

	Number of stations			
	German	French	Italian	Rhaeto-Romanic
public	5	4	3	1
foreign	4	3	4	
local	26	12	2	
	Market share in %			
	German	French	Italian	Rhaeto-Romanic
public	66	60	80	
local	25	25	7	
other	9	15	13	

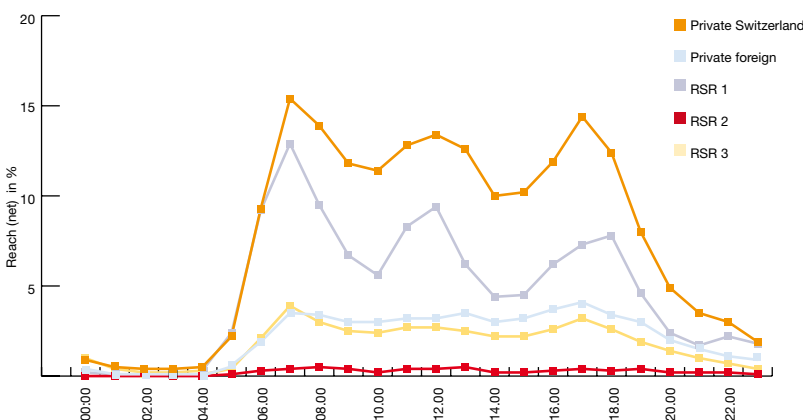
Radio Consumption, German-speaking Switzerland Mon–Fri, 2005



Universe: People from 15 - 49 years old

Source: Radiocontrol

Radio Consumption, French-speaking Switzerland Mon–Fri, 2005



Universe: People from 15 - 49 years old

Source: Radiocontrol

Television in Switzerland

The choice of television stations on offer has developed similarly to that of radio stations. Alongside the public channels of SRG SSR and regional programs, various stations are transmitted to Switzerland from abroad via cable. Not all of them, however, offer the possibility for the so-called «Swiss window», in which advertising is adapted to Swiss consumers in terms of both language and subject matter. These channels – and therefore their advertising windows – reach 82% of the TV households in Switzerland, since not all households are equipped with cable. The public programs of SRG SSR, on the other hand, can not only be received via cable but also terrestrially and therefore cover the area.

Although the ratings show that the first programs are in the lead in all parts of the country, channels from abroad basically enjoy stronger popularity. As is similar in print, what counts for the Swiss here is also the personal and country-typical references, whether it be through Swiss homegrown productions or news programs.

As in other countries as well, the gross market share of TV advertising in Switzerland has consistently risen over the past few years. Nevertheless, in comparison to other European countries, the TV market share in Switzerland is rather low. In a media mix, TV advertising ensures high coverage and quick advertising awareness through fast exposure accumulation.

Advertising and sponsoring possibilities in Switzerland

TV advertising: Classic TV spots, special advertising forms, current special offers, customer tailor-made spot innovations, TV spots in combination with Teletext

TV sponsoring: Billboard and reminder, promo trailer, insert, props placement, contests/award donation

What television advertising in Switzerland can not do

In general, there is a ban on advertising for alcohol, tobacco, prescription medication as well as religious and political purposes, even for elections.

Television Density Switzerland

Area	Total population 15 and older		Distribution of televisions		Television density
	absolute	in %	absolute	in %	in %
German-speaking Switzerland	4,313,400	72.2	4,011,462	71.9	93
French-speaking Switzerland	1,390,300	23.3	1,306,882	23.4	94
Italian-speaking Switzerland	269,200	4.5	258,432	4.6	96
Total Switzerland	5,972,900	100.0	5,576,776	100.0	93

Source: Annual Report 2004 Research Service of SRG SSR idée suisse

Average Market Share (in %) per Program

German-speaking Switzerland

SF 1	SF zwei	RTL	SAT1	ARD	ZDF	PRO7	ORF1	VOX	RTL2	RTL	KAB1	ORF2	MTV	other
23.8	8.5	7.4	6.7	5.8	5	4.6	4.2	3.4	3.1	3	2.5	2.2	0.5	18.2

French-speaking Switzerland

TSR1	TF1	F2	TSR2	F3	M6 (F)	M6 (CH-F)	RTL9	other
25	16.9	9.4	6.2	5.6	5.2	3.7	3.9	24.2

Italian-speaking Switzerland

TSI 1	CAN5	RAI1	ITAL1	RAI2	TSI 2	other
26.2	11.9	10	7.9	6.8	6.5	30.6

	Public programs Switzerland
	Foreign private with Swiss advertising window
	Foreign private with no Swiss advertising window
	Public program abroad (with no Swiss advertising window)

All SRG-SSR, private and foreign TV programs have been taken into account

Source: Telecontrol 2005, people 3+ (ø24 hours)

cinema

Switzerland's cinema market

The cinema medium has not lost its fascination even in the age of Home Cinema and ever faster DVD releases. The cinema still stands for communal free time enjoyment, for the unparalleled fascination of the big screen and a unique space and sound experience. Cinema operators have continually expanded and modernised their theatres and have adapted them to conform to the latest requirement in terms of technology and infrastructure. The Swiss cinema market consists of a total of approximately 500 screens, of which 465 can be booked for advertising purposes, and approximately 100 open-air events. More and more new cinema complexes are replacing the traditional single cinema and offer their public a wide range of free time activities including shopping, food, amusement arcades, etc. The share of theatres in larger cinema complexes (five or more theatres) has doubled over the last ten years and stands at 21% today. Switzerland currently has more than ten multiplex cinemas, and additional centres will be opening in the coming years.

For years, movie-theatre attendance in Switzerland has been very high, ranging from 15 to 18 million ticket admissions annually. The core target group of «heavy user» is between 18 and 34 years old and attends ten to twelve film showings every year. In general, movie-goers are young, urban, well-educated and enjoy going out. For them, the advertising film is also a part of the cinema experience and is met with large acceptance and support.

What is on offer for advertising customers includes on the one hand geographic regions, metropolitan centres and several cities as well as the possibility of booking six different film genres.

Digitalisation - a new era for cinema advertising

With the introduction of digital projection in the summer of 2005, Switzerland made a quantum leap in the area of cinema advertising. Instead of receiving the advertising film roll on 35mm film, theatres are sent the advertisement via ADSL cable and use a beamer to transmit it.

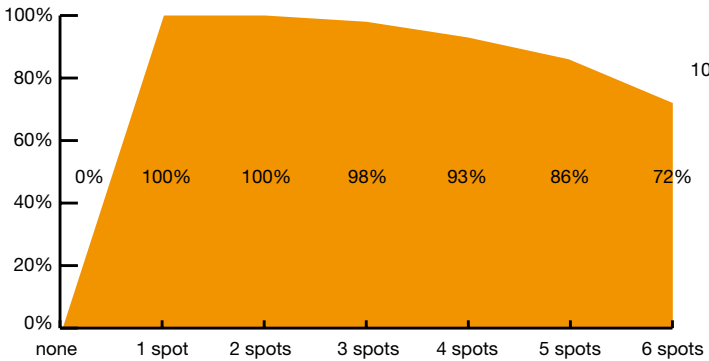
Digitalisation moves cinema advertising closer to the TV medium. Bookings can now be made much more quickly (leader times of three to four weeks have been reduced to five days), copy changes are possible and customers can book their campaigns more flexibly according to geographic area, film genre or individual cinema.

Additionally, cinema operators are presented with many new ways the theatre may be used: Notebook presentations (Powerpoint, etc.) can be shown at no great expense, and short films on DVD can also be transmitted. Even live broadcasts of sports or music events are possible.

Digital projection was introduced in Europe first in Norway, Austria and parts of Great Britain. Switzerland also assumes a pioneering role with the introduction of this new technology.

Recall Value Advertising Films

Cumulated unaided/aided



Example question: Which spots do you remember, or, can you remember having seen a spot for product XY?

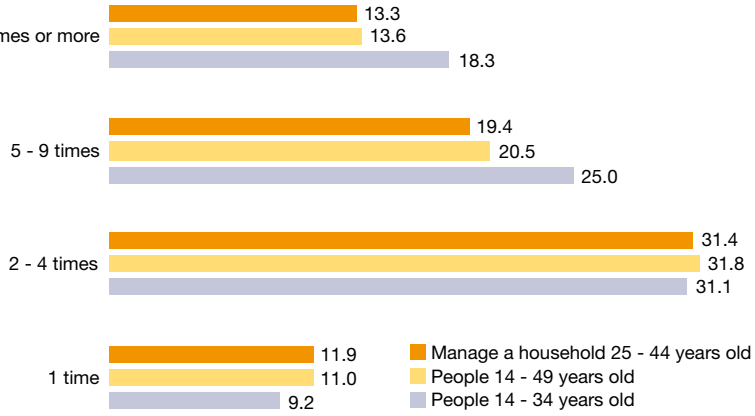
Result: 72% of movie-goers surveyed remember 6 cinema spots and give the correct information about brand and/or product!

Source: Media Audit, Survey: Movie-goers, January-March 2003, 200 respondents in the 76 largest cinemas, national

Cinema Attendance

in the last 12 months

Basis: amount (in %)



Source: MACH Consumer 2005 total Switzerland 14+

outdoor

On the go and yet able to reach

90% of all people residing in Switzerland leave their homes at least once a day. On a daily average, each person travels 37 kilometres – for work, for education, for shopping, for free time activities – and spends 85 minutes doing so. About a half an hour, or one third, goes to pedestrian traffic, which – compared to automobiles – is decidedly looked upon as a slow means of travel. We are becoming more and more mobile, are increasingly on the go and therefore, only able to be reached on the go. The advertising poster benefits as it is the most important out-of-home medium and is the only one which can be planned and checked.

Target areas . . .

On the basis of the WEMF sector structure, posters can be placed to precisely cover geographically determined target groups: overall with compact, homogeneous networks, or precisely targeted with selected individual areas. Thanks to diverse, multifunctional city furniture (waiting areas, telephone booths, city maps, etc.), advertising locations can be found even in the innermost areas of the city.

. . . and target groups

Depending on the promotion location of the poster, approximation opportunities are also opened up to interesting target groups or consumer situations: in train stations, shopping centres, car parks, on public transport or in the field of tourism.

Research, services and tools

In Switzerland, posters can also be booked based on a weekly cycle, with address reservations and performance information. Upon request, each customer receives the location of his poster including a picture which is visualized on geographically coded maps. There have been numerous studies carried out by independent market research institutes on the advertising effect of posters. Diverse mobility analyses examine exposure and coverage. In addition to this, there are various special studies such as those of the different outdoor firms, which examine the advertising effect of out-of-home campaigns on the basis of their recall performance. Since 1997, a service tool in the form of a classic post test has been available from the PPI®, which regularly assesses the recall, brand rating and acceptance of current, commercial poster campaigns and serves as a controlling and benchmarking instrument for customers. In addition to these poster campaign analyses, the first independent planning study for Switzerland is expected to be published in autumn 2006 with SPR Swiss Poster Research Plus.

Daily Mobility per Person

Transport means ¹	Daily distance		Movement	
	in km	in %	in min.	in %
Total	37.2	100	84.5	100
Automobile driver	17.9	48	25.8	31
Automobile passenger	7.2	19	9.5	11
Train	5.1	14	4.9	6
On foot	1.7	5	28.9	34
Bus/tram	1.5	4	4.8	6
Bike	0.9	2	4.7	6
Other²	2.9	8	5.9	6

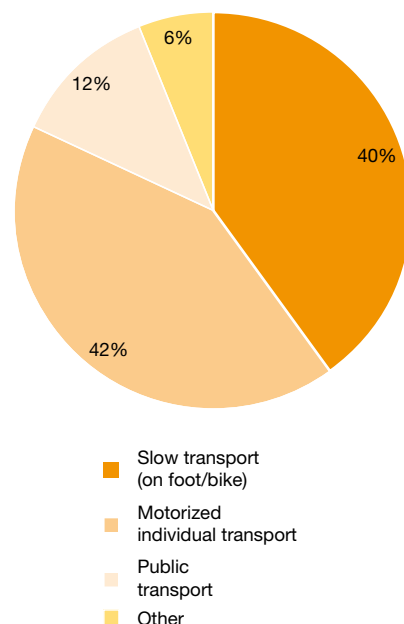
¹ On average every weekday and all people surveyed (Basis: 27,918 households, i.e. 29,407 single persons 6+ years old)

² Motorized bicycle/mini motorbike, motorcycle, coach, aeroplane, taxi, lorry, boat, mountain railways

Source: Federal Office of Statistics, sample census 2000 of transport behaviour

Daily Method of Movement

Answers in % of respondents (basis = 29,407 people)



Source: Federal Office of Statistics, sample census 2000 of transport behaviour

MACH Basic

Swiss media coverage study for print and cinema

MACH Basic is the standard planning tool used in the print sector, providing extensive information about print media consumption. The study contains data concerning the reach of newspapers and magazines as well as cinemas. MACH Basic divides the population up according to socio-demographic features and is suitable for assessing the potential in markets, sub-markets and target groups, for producing publication analyses and reader profiles, as well as for optimising media use.

Methodology

Universe	14+ years old; Switzerland/Liechtenstein; 5,717 million people
Survey sample	representative; two-stage random selection procedure
Survey sample size	23,698
Frequency	annually until 2005, semi-annually from 2006
Evaluation	package basic report incl. CD ROM; electronic data record for individual evaluation; online access: www.wemf.ch or www.publimedia.ch
Evaluation criteria	according to content as well as affinity; projection; structure data (media), personal situations and interests (individuals/households)

MACH Consumer

Swiss consumer and media analysis

MACH Consumer complements MACH Basic with consumer data. It gives information on ownership, consumer behaviour, buying behaviour and buying habits in Switzerland. Not only does one learn about what the target groups aimed at are buying, consuming and thinking, but MACH Consumer also shows which media they can be reached with in the most efficient way.

Methodology

Universe	14+ years old; Switzerland/Liechtenstein; 5,717 million people
Survey sample	representative; single-source with MACH Basic
Survey sample size	10,673
Frequency	annually until 2005, semi-annually from 2006
Evaluation	package basic report incl. CD ROM; electronic data record for individual evaluation; online access: www.wemf.ch or www.publimedia.ch
Evaluation criteria	according to content as well as affinity; projection; structure data

MA Leader

Media analysis of executives

MA Leader analyzes the media behaviour (print media and selected websites), the professional decision-making and leadership authority as well as the private ownership of high quality products of executives in German and French-speaking Switzerland. The analysis distinguishes between two groups: "Leader", personal annual income of more than CHF 100,000 with professional decision-making authority, and "Top Leader", income of more than CHF 140,000 with decision-making and leadership authority. MA Leader is suitable for assessing market potential, producing publication analyses and reader profiles, as well as optimizing the media usage based on performance-calculation data.

Methodology

Universe	Leader (218,000 people) and Top Leader (103,000 people) in German and French-speaking Switzerland
Survey sample	selection from large studies, screening interviews
Survey sample size	3,411
Frequency	every 2 years
Evaluation	basic report; CD ROM; electronic data record for individual evaluations; online access: www.wemf.ch or www.publimedia.ch
Evaluation criteria	according to content as well as affinity; projection; structure data (media)

MA Strategy

Swiss inter-media comparison study

MA Strategy provides information on the media types: print, cinema, TV, radio and the Internet. It is of valuable help to advertisers when considering what the best suited media mix is for the particular target group aimed at.

Methodology

Universe	14+ years old; Switzerland/Liechtenstein 5,717 million people
Survey sample	representative; two-stage random
Survey sample size	10,673
Frequency	annually
Evaluation	online access: www.wemf.ch or www.publimedia.ch
Evaluation criteria	according to content as well as affinity; restricted user group

Market Radar

Marketing control system

This system identifies simple and flexible market structures according to psychographic as well as demographic features, shows market volumes and reasons why. It enables not only comparisons of markets, media and advertising but also a tracking of market developments over an extended period.

Methodology

Universe	15-74 years old; German and French-speaking Switzerland; approx. 5.2 million people
Survey sample	representative; random quota
Survey sample size	1,000 – 10,000, depending on data record
Frequency	annually/every two years
Evaluation	consulting, workshop, data on CD ROM, report or MRP software
Evaluation criteria	age pyramid, «regiogram», stratification, lifestyles, psychographic segmentation

Media Radar

Media component in Market Radar

Media Radar is a special data record of the Market Radar information system. With this tool, media users can be broken down into psychological groups and, by means of a media evaluation program, media planning can be carried out for target groups defined in terms of psychographics.

PAM Print Advertising Monitor

Ratings for print campaigns

PAM is the only permanent, type and title covering copy test in Switzerland. This tool shows the effective transport performance of nationally distributed advertising campaigns which are aimed at wider segments. PAM links the calculated media exposure probability with the actually reached campaign and subject ratings concerning recall, interest and first impression. Information: www.publimedia.ch

CAM (Cinema Admission Monitor)

Prognosis and post check tool for cinema campaigns

CAM enables prognoses and the respective post checks to be carried out for cinema campaigns in various target groups. Seasonal fluctuations in numbers of movie-goers in the Swiss market are taken into consideration. CAM provides accurate information about the current situation concerning movie-goers in Swiss cinemas. The study is based on the WEMF's MACH Basic figures, in addition to the effective box office ticket sales figures.

MA Comis

Coverage and user structures of websites

MA Comis is a market and media study concerning the topics of websites, the Internet, e-commerce, Internet providers and mobile telephones. It describes the users of the participating websites and makes it possible to then draw up user profiles in terms of socio-demographics, media consumption habits and attitudes.

Methodology

Universe	14+ years old; German and French-speaking Switzerland; 3,711 million Internet users
Survey sample	representative; random quota
Survey sample size	3,428
Frequency	annually
Evaluation	CD ROM incl. user-friendly cross-tabulation program, online access www.wemf.ch or online planner at www.web2com.ch
Evaluation criteria	according to content

Telecontrol

Swiss television research panel

Telecontrol is both a planning and controlling instrument for TV advertising. Data record of offering determination, program design and advertising effectiveness control. Market potential assessment, analyses and audience profiles, optimization of media record by means of performance data assessments.

Methodology

Universe	people in TV households, 3+ years old, 6.9 million people
Survey sample	representative; random quota
Survey sample size	4,160 people in 1,870 panel households
Survey type	Telecontrol apparatus; electronic measuring to the second daily
Frequency	daily
Evaluation	Report; online access: TC 2000 Reporter, TV-Plan plus
Evaluation criteria	according to content as well as rating; market share; reaction index; average age of public; coverage; consumption in minutes

Radiocontrol

Swiss radio research

Radiocontrol is an instrument for planning and controlling radio advertising. The data record is useful for price setting, program design and advertising effectiveness control, as well as for the assessment of potential, time series analyses and the creation of radio audience profiles. Optimization of radio campaigns through the assessment of performance data.

Methodology

Universe	15+ years old; 5.9 million
Survey sample	representative; random quota
Survey sample size	1,002 people per day
Survey type	Radiocontrol wristwatch, electronic measurement to the minute
Frequency	daily
Evaluation	online access by means of RC2000 Reporter
Evaluation criteria	socio-demographic criteria, as well as coverage, consumption in minutes, market share, average age of audience, GRP, OTS

PPI Poster Performance Index

Poster Performance Index PPI is a classic post test. PPI provides extensive quantitative and qualitative performance reports for poster campaigns: coverage, exposure opportunity, GRP, recall value, brand rating and preferences.

Methodology

Test area	area of concentration Berne and Lausanne
Universe	population of surveyed area of concentration between 15 - 49 years old
Survey sample size	400 people (200 people in Berne and 200 in Lausanne)
Evaluation	online access: www.apg.ch

Swiss Poster Research Plus

Swiss poster research

SPR+ is the first poster research in Switzerland independent of provider. It serves as a planning and controlling instrument for poster advertising. It provides support throughout the entire planning process from the strategic to the detailed campaign planning through to the provision of performance ratings.

Methodology

Universe	15+ years old; 5.9 million people
Survey sample	representative, random quota
Survey sample size	10,000 in 12 agglomerations
Survey type	mobility meter, GPS measurement per second to the meter as of October 2006 at www.spr-plus.ch
Evaluation	
Evaluation criteria	socio-demographic criteria, poster exposure, coverage, OTS, GRP

AIS Advertising Index Switzerland

Swiss gross advertising investment

The WEMF makes available to the advertising industry information about the advertising investments (excl. production costs) of national and non-local advertising clients in all relevant media. AIS allows for the continual observation of the advertising activities of the competition, branches and products. The data is available as from the year 2003.

AIS primarily differs from Media Focus in that AIS represents invoiced gross amounts (except TV and cinema).

Methodology

Newspapers	approx. 102 titles, incl. classified advertisements, all ads greater than 399 mm in size
Magazines	approx. 86 titles
Internet	approx. 75% of online advertising
TV	approx. 95% of TV advertising
Radio	approx. 75% of radio advertising
Cinema	100% of cinema advertising
Poster	approx. 95% of poster advertising
Teletext	100% of teletext advertising

Media Focus

Swiss gross advertising investment

Media Focus is specialized in the measurement of advertising expenditure (excl. production costs). It measures the advertising activities of companies, branches and products in all the conventional advertising media. The data is available as from the year 1993. Media Focus differs from AIS in that it lists the published gross amount.

Methodology

Newspapers	approx. 131 titles, excl. classified advertisements, all ads greater than 200 mm in size
Magazines	approx. 211 titles
Internet	approx. 75% of online advertising
TV	approx. 95% of TV advertising
Radio	approx. 75% of radio advertising
Cinema	100% of cinema advertising
Poster	approx. 95% of poster advertising
Teletext	100% of teletext advertising

Sources/links

Page	Source	Link	Brief Description
4/5	Federal Office of Statistics	www.bfs.admin.ch	Population structure and Top Ten agglomerations
5	DM-Plus 2005 (GfK-/bwv-groups)		Market data «Personal disposable income»
6	Institutional Investor	www.institutionalinvestor.com	International comparison of credit rating of various nations
6	OECD	www.oecd.org	Comparison of price levels of all OECD nations
6	UBS «Switzerland in Figures»	www.ubs.com	(Wealth Management Research) Demographic and economic indicators in an international comparison
6	UBS «Prices and Salaries»	www.ubs.com	(Wealth Management Research) Information about price levels, buying power, salaries of various international cities
6	NBB, Belgium National Institute of Statistics		Belgium Federal Office of Statistics
6	SCB Sweden Statistics	www.scb.se	Swedish Federal Office of Statistics
7	Swiss Customs Administration	www.ezv.admin.ch	Data on Swiss import and export
7	Eurostat	http://europa.eu.int/comm/eurostat	EU portal for statistics, data on import and export of the European Union
8	World Press Trends World Association of Newspapers	www.wan-press.org	Data on the newspaper scene worldwide
8	Western Europe Market and MediaFact ZenithOptimedia		Demographic, economic data as well as information about media scenes worldwide
8	Gwa Mediaplaner 2005 Head Organisation of Communications Institutions (Germany)	www.gwa.de	Data on Germany media scene as well as a few European countries
8	European Marketing Pocket Book 2005 WARC World Advertising Research Center	www.warc.com	Pan-European statistics on the economy, demographics, marketing and media
8	nVision Europe		Data on EU media consumption
9	Nielsen NetRatings	www.nielsen-netratings.com	Media and market research
10	Radiotele	www.radiotele.ch	Sales organisation for radio and TV advertising, data on the radio scene
10	VSW Verband Schweizer Werbegesellschaften	www.vsw-assp.ch	Association of Swiss Advertising Companies, data on Swiss print media scene
10	Cinecom	www.cinecom.ch	Marketing of cinema, TV and print advertising, data on Swiss cinema market
10	Publisuisse	www.publisuisse.ch	SRG SSR idée Suisse company, marketing of public stations, data on Swiss TV market
11/13	MA Strategy 2005 WEMF AG für Werbemedienforschung	www.wemf.ch/d/studien/mastrategy.shtml	WEMF tool for the evaluation of media consumption in Switzerland (intermedia study)
12	WAN World Association of Newspapers	www.wan-press.org	Data on newspaper density in Europe
12	FIPP International Federation of the Periodical Press	www.fipp.com	Data on magazine density in Europe
13	ERASM Institut	www.erasm.ch	Data on topic «Disturbance due to advertising»
14	Online-Media-Planer	www.web2com.ch	Information on the Internet as a communication channel
15	MA Comis WEMF AG für Werbemedienforschung	www.wemf.ch/d/studien/macomis.shtml	Market and media study on Internet, website and E-commerce use
16	Radiocontrol	www.radiocontrol.ch	Swiss radio research
17	Telecontrol	www.telecontrol.ch	Swiss television research
18	MACH Consumer WEMF AG für Werbemedienforschung	www.wemf.ch/d//studien/machconsumer.shtml	Study on consumer behaviour and media consumption of print and cinema
18	Media-Audit		Survey on the recall value of cinema advertising
19	Federal Office of Statistics	www.bfs.admin.ch	Sample census of transport behaviour
19	APG Affichage	www.apg.ch	Marketing of outdoor advertising
	Exchange rate ECB European Central Bank		1 USD = 1.24 CHF 1 Euro = 1.54 CHF

services

Publicitas Promotion Network

The partner for advertisers and publishers worldwide

Publicitas Promotion Network, the only independent advertising representative active worldwide, is a preferred partner of many world famous newspapers and magazines thanks to its know-how in the area of marketing and sales of press advertisements as well as its offers available in combination with the Internet.

The 58 sales offices in 22 countries on four continents reinforce the sales departments of renowned publications and represent them in the international, national and regional markets. Publicitas Promotion Network coordinates the marketing and advertisement sales worldwide as well as the sale of Internet and TV advertising, in accord with the product range of the represented media companies.

Owing to its interlinked structure, all publisher's data is kept in a single databank à jour. Publishing houses are therefore guaranteed that their most current offers are always present on the markets and Publicitas Promotion Network's know-how is promoted for the benefit of its advertising customers. Thanks to extensive knowledge of advertising markets and press media as well as close relations with advertising agencies and customers in local markets, the approximately 480 staff members see to it that the

promotion of the publications represented is efficient and that the efficiency of advertising campaigns is improved.

Through the regional presence, Publicitas Promotion Network has the unique advantage of being able to furnish their agents and customers with specialised market knowledge for their global marketing strategies on the spot. The competent consulting covers the whole palette from rankings and plan evaluations from national and pan-national studies, detailed cost planning as well as offers at original conditions. Professional coordination and trouble-free handling of advertisement orders in foreign media is a matter of course and equally includes publication check, invoicing and voucher copy dispatch. In addition, Publicitas Promotion Network bundles market data on countries just as it does on branches and makes it available to customers and agencies.

Pro-active sales for the publishing house partner and competent service for international advertisement customers and their agencies is Publicitas Promotion Network's guiding principle.

www.publicitas.com

Publicitas Swiss Press

The partner for international advertising in the Swiss press and the starting point for Publicitas Promotion Network in Switzerland

Publicitas Swiss Press – a PubliGroupe service company – forms the bridge between Publicitas Promotion Network (PPN) and Swiss media companies. Publicitas Swiss Press is PPN's contact partner for the Swiss print media and it is the Swiss publishing houses' contact partner for customers and agency contacts worldwide.

As a Swiss media market specialist, Publicitas Swiss Press advises and supports the international branches of PPN in its sales activities as well as in the planning and realization of advertising campaigns in the complex Swiss media scene. Publicitas Swiss Press supplies the sales and consulting teams of the international network with data and facts about the Swiss market. As a result of the possibility to access the most important studies, especially in the area of print, as well as all relevant media research and a single print media databank for the entire Swiss advertising market, Publicitas Swiss Press is able to provide rankings and evaluations very quickly. In addition, Publicitas Swiss Press regularly delivers news from the agile Swiss publishing and media scene.

On the other hand, Publicitas Swiss Press supports Swiss publishing houses when the promotion of the Swiss media – especially Swiss newspapers and magazines – in the international market is concerned. Through PPN's network, Publicitas Swiss Press partners have a strong partner in the local markets, who - literally - speaks the language of the customers and agencies. With regular visits abroad, Publicitas Swiss Press not only maintains the Publicitas Promotion Network contact, but also that of its international customers and agencies and can therefore open many doors for Swiss media providers.

Along with the professional service they receive in the entire area of order handling, Publicitas Swiss Press media partners also receive regular information about trends and changes in the international advertising market and the advertisers.

www.publicitasswisspress.com

We would like to thank the following companies for their support and contributions:

Internet: web2com

Radio: Radiotele

TV: publisuisse

Cinema: Cinecom

Outdoor: APG

Publicitas Promotion Network – we're never far away!

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