

# **Western Europe Market & MediaFact**

## **2008 Edition**

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ISSN 1469-6614

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SUMMARY TABLES: EXCHANGE RATES

**SUMMARY TABLES**

**EXCHANGE RATES**

1 US\$ = ...local currency

<b>Country</b>	<b>Currency</b>	<b>2007</b>	<b>2006</b>	<b>% change</b>
Austria	Euro (€)	0.73	0.80	-8.3
Belgium	Euro (€)	0.73	0.80	-8.3
Denmark	Krone (DKr)	5.44	5.95	-8.5
Finland	Euro (€)	0.73	0.80	-8.3
France	Euro (€)	0.73	0.80	-8.3
Germany	Euro (€)	0.73	0.80	-8.3
Ireland	Euro (€)	0.73	0.80	-8.3
Italy	Euro (€)	0.73	0.80	-8.3
Netherlands	Euro (€)	0.73	0.80	-8.3
Norway	Krona (Nkr)	5.86	6.41	-8.6
Portugal	Euro (€)	0.73	0.80	-8.3
Spain	Euro (€)	0.73	0.80	-8.3
Sweden	Krona (SKr)	6.76	7.38	-8.4
Switzerland	Franc (CHF)	1.20	1.25	-4.3
United Kingdom	Pound (£)	0.50	0.54	-8.0

SUMMARY TABLES: ADVERTISING EXPENDITURE

## ADVERTISING EXPENDITURE

### Advertising as a percentage of Gross Domestic Product

	2000	2001	2002	2003	2004	2005	2006	2007
Austria	0.90	0.90	0.85	0.86	0.87	0.87	0.88	0.91
Belgium	0.72	0.68	0.73	0.78	0.80	0.81	0.92	0.95
Denmark	0.89	0.83	0.75	0.74	0.75	0.76	0.83	0.83
Finland	0.85	0.76	0.73	0.74	0.75	0.76	0.74	0.74
France	0.65	0.59	0.56	0.55	0.56	0.56	0.55	0.54
Germany	0.97	0.87	0.78	0.74	0.73	0.75	0.78	0.77
Ireland	0.74	0.75	0.79	0.83	0.94	0.90	0.95	0.97
Italy	0.68	0.63	0.58	0.59	0.60	0.60	0.59	0.58
Netherlands	0.93	0.83	0.78	0.72	0.70	0.68	0.68	0.68
Norway	0.88	0.84	0.87	0.96	1.00	1.08	1.07	1.14
Portugal	0.79	0.70	0.61	0.61	0.63	0.61	0.58	0.58
Spain	0.88	0.79	0.73	0.70	0.72	0.73	0.73	0.75
Sweden	0.83	0.71	0.65	0.63	0.63	0.67	0.71	0.72
Switzerland	1.05	0.97	0.88	0.82	0.72	0.73	0.76	0.80
UK	1.10	1.01	0.96	0.93	0.96	0.87	0.88	0.91
<b>Western Europe^</b>	<b>0.87</b>	<b>0.79</b>	<b>0.74</b>	<b>0.72</b>	<b>0.73</b>	<b>0.74</b>	<b>0.74</b>	<b>0.75</b>

*Note: These figures have not been adjusted to account for different methods of compilation and are therefore not fully comparable.*

*^above countries only*

SUMMARY TABLES: ADVERTISING EXPENDITURE

**Distribution of advertising expenditure by medium (% of total)**

	2007		%					
	adspend (US\$m)	News- papers	Maga- zines	TV	Radio	Cinema	Outdoor	Internet
Austria	3,373	39.5	19.2	24.2	6.9	0.6	6.9	2.6
Belgium	4,287	28.8	9.6	37.1	12.0	0.8	7.6	4.1
Denmark	2,587	42.6	5.7	17.9	2.2	0.4	14.0	17.2
Finland	1,800	52.5	16.0	19.9	3.6	0.2	3.2	4.7
France	13,904	15.1	19.9	34.6	7.6	0.9	10.8	11.1
Germany	25,758	36.7	21.5	22.1	3.7	0.6	4.4	11.1
Ireland	2,536	58.4	2.2	20.2	7.6	0.6	9.9	1.2
Italy	12,249	18.8	13.7	53.2	6.9	0.7	3.6	3.2
Netherlands	5,249	39.9	21.0	22.5	7.1	0.1	4.3	5.0
Norway	4,459	41.5	8.5	24.6	4.6	0.8	3.7	16.2
Portugal	1,285	7.1	16.0	56.7	5.4	0.6	12.8	1.4
Spain	10,738	24.1	9.2	44.2	8.6	0.5	7.2	6.1
Sweden	3,273	41.3	11.3	21.2	2.9	0.4	4.7	18.3
Switzerland	3,345	35.3	21.7	26.3	3.4	1.2	10.9	1.3
UK	25,511	31.2	11.7	26.5	3.7	1.6	6.5	18.8
<b>Western Europe<sup>^</sup></b>	<b>83,465</b>	<b>30.8</b>	<b>15.2</b>	<b>30.6</b>	<b>5.5</b>	<b>0.8</b>	<b>6.3</b>	<b>10.6</b>

*Note: 1. These figures have not been adjusted to account for different methods of compilation and are therefore not fully comparable.*

*2. For Denmark, 'outdoor' includes 'other', and as well as outdoor includes free magazines, directories, annuals, and trade press.*

*<sup>^</sup>above countries only*

SUMMARY TABLES: TELEVISION

# TELEVISION

## Household penetration of TV accessories (%)

Country	Homes (000s)	Television penetration %	Colour	Percentage of TV homes with				
				PVR	Satellite	Cable	DTT	IPTV
Austria	3,537	96	97.9	18.7	53.8	35.2	5.5	0.1
Belgium	4,895	99	-	-	9.1	94.2	-	-
Denmark	2,532	100	100.0	2.1	15.3	67.0	-	-
Finland	2,417	94	100.0	36.0	3.0	43.0	42.0	-
France	27,690	91	97.5	7.3	-	10.1	34.5	11.0
Germany	34,990	-	97.0	8.1	51.8	52.3	9.8	10.3
Ireland	1,579	98	-	9.0	36.0	35.0	-	-
Italy	23,600	99	98.2	-	23.2	5.4	23.7	-
Netherlands	7,242	98	-	-	-	-	-	-
Norway	2,105	100	100.0	11.0	30.3	50.0	-	-
Portugal	3,505	100	96.7	-	6.1	27.0	-	-
Spain	16,122	100	99.5	-	20.2	11.5	30.7	3.0
Sweden	4,695	-	99.9	24.2	23.7	42.8	30.0	1.8
Switzerland	3,337	93	95.0	5.0	9.0	78.0	-	-
UK	26,176	98	100.0	-	36.0	13.6	37.4	0.2



SUMMARY TABLES: TELEVISION

**Viewing/rates**

<b>Country</b>	<b>Average minutes viewed per day Adults</b>	<b>Average 30 sec CPT US\$ Adults</b>
Austria	157	25.9
Belgium	172/205*	17.8/17.2*
Denmark	168	29.1
Finland	166	21.9
France	219	12.2
Germany	223	30.8
Ireland	199	14.6
Italy	234	15.8
Netherlands	186	15.8
Norway	154	37.0
Portugal	216	28.2
Spain	222	12.3
Sweden	149	11.5
Switzerland	139	28.9
UK	233	10.7

\* North/South

# NEWSPAPERS/MAGAZINES

## Average rates

<b>Country</b>	<b>Newspaper B/W CPT US\$ Adults</b>	<b>Magazine colour CPT US\$ Adults</b>
Austria	37.0	34.2
Belgium	51.0	18.5
Denmark	33.5	28.5
Finland	72.5	19.3
France	32.9	11.5
Germany	65.9	17.5
Ireland	68.5	69.9
Italy	82.3	47.9
Netherlands	32.9	18.6
Norway	41.0	25.9
Portugal	20.5	30.1
Spain	25.3	28.4
Sweden	43.8	21.5
Switzerland	32.1	36.3
UK	20.6	23.8

SUMMARY TABLES: RADIO

# RADIO

## Stations/rates

<b>Country</b>	<b>Number of commercial radio stations</b>	<b>Average 30 sec CPT US\$ Adults</b>
Austria	61	6.3
Belgium	18	-
Denmark	36	9.2
Finland	56	-
France	16	10.8
Germany	344	2.8
Ireland	33	1.5
Italy	285	4.5
Netherlands	15	5.3
Norway	3	19.1
Portugal	352	4.7
Sweden	90	41.1
Switzerland	52	15.5
UK	298	5.0

**OUTDOOR****Sites**

<b>Country</b>	<b>Number of outdoor sites</b>
Austria	64,540
Belgium	35,529
Finland	100,000
Germany	344,690
Ireland	14,257
Italy	156,739
Portugal	104,203
Spain	153,030
Sweden	46,000
Switzerland	100,000
UK	125,716

SUMMARY TABLES: CINEMA

# CINEMA

## Screens/rates

<b>Country</b>	<b>Number of cinema screens</b>	<b>Average 60 sec CPT US\$ Adults</b>
Austria	570	261.6
Belgium	500	-
Denmark	229	71.7
Finland	316	153.4
France	5,398	-
Germany	4,824	68.5
Ireland	430	75.5
Italy	2,963	-
Netherlands	303	-
Norway	662	-
Portugal	546	96.2
Spain	4,296	-
Sweden	687	113.0
Switzerland	556	212.5
UK	3,596	233.4

SUMMARY TABLES: **CINEMA**

**Cinema admissions (mill)**

	2000	2001	2002	2003	2004	2005	2006	2007
Austria	16.3	18.8	19.2	17.7	19.4	15.7	17.3	15.7
Belgium	23.5	24.0	24.4	22.7	24.1	21.4	23.8	22.3
Denmark	-	-	21.4	20.4	21.2	20.2	20.9	20.1
Finland	7.1	6.5	7.7	7.7	6.9	6.1	6.7	6.5
France	166.0	187.1	184.4	173.5	194.8	176.0	189.0	178.0
Germany	152.5	177.9	163.9	149.0	156.7	127.3	136.7	-
Ireland	14.9	15.9	17.3	17.4	17.3	16.4	17.8	-
Italy	108.6	101.0	89.0	87.0	97.0	90.0	92.0	104.0
Netherlands	21.5	23.8	24.1	24.9	23.0	20.6	23.4	-
Norway	11.6	12.0	12.0	13.0	12.0	11.3	12.0	10.8
Portugal	17.2	20.9	19.5	19.0	18.7	15.7	16.4	16.3
Spain	135.0	133.1	141.0	137.5	143.9	127.6	121.1	116.9
Sweden	17.0	18.1	18.3	18.2	16.6	14.6	14.8	-
Switzerland	15.6	17.1	18.8	17.0	17.7	15.4	16.8	-
UK	143.0	156.0	176.0	167.0	171.3	164.7	157.0	163.0

## SUMMARY TABLES: INTERNET

**INTERNET**

	<b>Internet households (%)</b>	<b>Adult population with access (%)</b>
Austria	40	70
Belgium	54	60
Denmark	85	95
Finland	71	83
France	46	-
Germany	68	58
Ireland	-	49
Italy	88	48
Netherlands	-	81
Norway	82	87
Portugal	45	47
Spain	39	41
Sweden	83	85
Switzerland	-	89
UK	67	67

SUMMARY TABLES: MEDIA REACH

# MEDIA REACH

	Daily (%)				Monthly (%)		
	News- papers	TV	Radio	Internet	Maga- zines	Cinema	Mobile TV
Austria	70	64	82	40	74	19	-
Belgium	55	92	82	37	97	45	-
Denmark	71	61	82	62	96	-	-
Finland	77	88	76	56	97	14	-
France	12*	79	84	-	97	20	2
Germany	73	87	77	33	67	20	4
Ireland	86	98	84	32	-	18	-
Italy	-	81	73	-	42	17	-
Norway	73	95	80	68	-	-	-
Portugal	43	83	55	34	39	20	-
Spain	42	89	53	28	42	-	0.3
Sweden	-	68	-	64	-	10	-
Switzerland	84	70	90	-	93	17	-
UK	44	66	-	-	61	13	-

\* national newspapers only



# AUSTRIA

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$ = 0.73 € at 2007 rate								
<b>Gross Domestic Product (€billion)</b>								
at current prices	210.4	212.5	218.8	223.3	232.8	244.5	257.3	270.8
% change	5.2	1.0	3.0	2.1	4.3	5.0	5.2	5.2
at 2007 prices	241.1	237.1	240.0	241.6	246.8	253.3	262.8	270.8
% change	2.7	-1.7	1.2	0.7	2.1	2.7	3.7	3.0
<b>Gross Domestic Product per capita (€000s)</b>								
at current prices	25.9	26.1	26.8	27.2	28.2	29.5	30.9	32.4
at 2007 prices	29.7	29.1	29.4	29.4	29.9	30.6	31.5	32.4
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	288.0	290.9	299.5	305.6	318.6	334.7	352.2	370.7
at 2007 prices	330.0	324.6	328.5	330.7	337.8	346.8	359.7	370.7
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	35.5	35.7	36.7	37.2	38.6	40.4	42.3	44.3
at 2007 prices	40.7	39.9	40.2	40.3	40.9	41.8	43.2	44.3
<b>Population</b>								
Millions	8.1	8.1	8.2	8.2	8.3	8.3	8.3	8.4
<b>Consumer Price Index</b>								
2007=100	87.3	89.6	91.2	92.4	94.3	96.5	97.9	100.0
% change	2.4	2.7	1.7	1.4	2.1	2.3	1.4	2.1
<b>Ad.spend as a % of GDP</b>								
	0.90	0.90	0.85	0.86	0.87	0.87	0.88	0.91
<b>Advertising Expenditure Growth (%)</b>								
at current prices	9.8	0.9	-2.6	2.9	5.7	5.4	5.8	9.2
at 2007 prices	7.3	-1.8	-4.2	1.5	3.6	3.0	4.3	6.9

Source: IFS, ZenithOptimedia

## ADVERTISING EXPENDITURE

### Advertising expenditure in €million at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	1,342	420	352	335	131	9	95	-
1998	1,492	459	415	355	152	9	103	-
1999	1,725	543	477	425	151	9	119	-
2000	1,894	721	414	479	158	11	112	-
2001	1,912	712	438	464	162	10	125	-
2002	1,862	683	431	456	147	9	136	-
2003	1,915	713	426	463	154	11	138	10
2004	2,025	756	430	497	171	10	139	22
2005	2,134	833	422	508	172	14	157	28
2006	2,257	882	438	545	170	15	170	37
2007	2,464	974	472	597	170	15	171	65

### Advertising expenditure in €million at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	1,597	500	418	398	156	10	114	-
1998	1,759	541	489	419	179	10	121	-
1999	2,024	637	560	499	177	11	140	-
2000	2,171	826	474	548	181	13	128	-
2001	2,133	795	489	518	181	11	139	-
2002	2,042	749	473	500	161	10	149	-
2003	2,073	772	461	501	167	12	149	11
2004	2,147	801	456	527	181	11	147	23
2005	2,211	863	437	526	178	15	163	29
2006	2,305	901	447	557	174	15	174	38
2007	2,464	974	472	597	170	15	171	65

Source: Focus Media Research

- Notes:
1. Includes agency commission at 15%
  2. Excludes production costs
  3. Excludes classified advertising (except online)
  4. Before discounts
  5. Daily newspapers only
  6. Internet includes actual figures for display and estimates for search

#### Main advertising restrictions

**Tobacco:** Banned on TV and radio, allowed with health warnings on outdoor and in press.

**Alcohol:** Heavily restricted.

**Pharmaceutical:** Ads for OTC medicines must be clearly labelled as such.

**Children's:** Advertising during children`s programmes is banned.

**Political:** Restricted.

## AUSTRIA: POPULATION

# POPULATION

Land area (km <sup>2</sup> )	82,444
Capital city	Vienna
Language	German
Currency	Euro (€)

Source: CIA Factbook 2008

### Population by age

	Male (000s)	Female (000s)	Total (000s)
0-15	711	676	1,386
16-24	468	453	921
25-34	545	542	1,088
35-44	697	685	1,382
45-54	597	596	1,193
55-64	452	478	929
65+	577	839	1,416
Total	4,046	4,269	8,315

Source: Statistik Austria

### Adult status

	Male (000s)	Female (000s)	Total (000s)
AB	1,128	913	2,041
C1	729	718	1,447
C2	645	748	1,393
D	647	734	1,381
E	225	492	717
Total	3,374	3,605	6,979

Source: Media-Analysis

#### Definition of adult status:

AB = high education (university; higher education institution) and/or high income

C1 = secondary education (vocational school); middle income

C2 = secondary education; middle to low income

D = elementary education; low income

E = subsistence

# TELEVISION

**Number of households: 3,537,000**

**Number of television households: 3,410,000 (96.4%)**

## Television homes with:

Colour	97.9%
VCR	74.9%
DVD	56.8%
PVR/DVR	18.7%
Multiset	49.6%
Cable (connection) - total	35.2%
Digital cable (connection)	5.9%
Satellite dish (DTH) - total	53.8%
Digital satellite dish	38.8%
Digital terrestrial television (DTT)	5.5%
IPTV	0.1%

*Source: MA 2007*

**TV licence cost (per year): €223-€285 (depending on region)**

**Average minutes viewed per day per adult: 157**

**Average pay-TV subscription cost (per month):**

	Average subscription €
Cable (analogue)	20.6
Cable (digital)	25.9
DTH (digital)	20.0
DTT	free
IPTV	4.9

*Source: providers*

## AUSTRIA: TELEVISION

### Main channels

Channel	Technical penetration (%)	Daily hours of transmission	Ad mins per week
<i>public</i>			
ORF1	99	24	238
ORF2	99	24	261
<i>private</i>			
ATV	80	24	1,310
PRO7 A	52	24	1,284
SAT1 A	52	24	1,233
KAB1 A	52	24	1,207
Puls TV/Puls 4	24	24	-
RTL A	48	24	1,246
RTL2 A	47	24	914
SRTL A	47	24	530
VOX A	48	24	1,175
NICK/VIVA	19	24	135
MTV A	30	24	972
GoTV	37	24	1,030

Source: Teletest, pc#tv, Jahrbuch der Werbung 2007

### Cost/audience

Channel	Peak time	Peak rate 30 sec €	Peak adult audience (000s)	30 sec peak adult CPT €
ORF-1	2015-2200	10,624.9	353.0	30.1
ORF-2	2015-2200	5,577.2	411.6	13.5
ATV	2015-2200	1,280.6	58.1	22.0
PRO7 A	2015-2200	610.5	43.0	14.2
SAT.1 A	2015-2200	565.2	56.2	10.1
KAB.1 A	2015-2200	314.1	31.5	10.0
RTL A	2015-2200	601.9	54.4	11.1
RTL2 A	2015-2200	271.9	20.1	13.5
SRTL A	2015-2200	189.0	15.1	12.5
VOX A	2015-2200	440.2	42.9	10.3
NICK/VIVA	2015-2200	68.1	0.9	79.2
MTV A	2015-2200	66.7	2.6	25.9
GOTV	2015-2200	38.7	0.8	45.9

Source: Teletest, pc#tv, TA 01-20, 2007, 12+

**Average CPT (all commercial channels): €18.9**

AUSTRIA: TELEVISION

**Share of viewing & ad revenue**

Channel	Share of viewing (%) 2007		Ad revenue 2007
	Individuals	Adults	€(mill)
<b>Public</b>			
ORF-1	17.8	17.6	175.4
ORF-2	24.4	25.5	160.7
<b>Private</b>			
ATV	2.6	2.7	50.1
PRO7 A	2.9	3.0	40.2
SAT.1 A	4.1	4.2	36.4
KAB.1 A	1.7	1.7	17.1
PULS TV	-	-	-
RTL A	3.4	3.5	36.7
RTL2 A	1.5	1.5	14.8
SRTL A	1.5	0.8	10.9
VOX A	2.4	2.4	21.3
NICK/VIVA	0.4	0.2	1.1
MTV A	0.3	0.3	6.0
GOTV	0.1	0.1	4.1

Source: Teletest, PC#TV, Focus MR, Buch der Werbung 2007

**Top ten television programmes (2007)**

Programme	Channel	Adult TVR
Zeit Im Bild 1	ORF	26.7
Opernball 2007 Die Eroeffnung	ORF-2	25.5
Bundesland Heute	ORF-2	24.0
Villacher Fasching 2007	ORF-2	22.1
Dancing Stars Die Entscheidung	ORF-1	21.3
Slalom Herren Schladming2	ORF-1	21.0
Narrisch Guat	ORF-2	20.4
Thema Spezial Der Fall Kampusch	ORF-2	19.4
Wm Rtl Damen Aare2	ORF-1	19.0
Wm Abfahrt Damen Aare	ORF-1	19.0

Source: Teletest, PC#TV, 2007, 12+

AUSTRIA: TELEVISION

**Top ten television  
advertisers (2007)**

Advertiser	TV expenditure €(000s)
Procter & Gamble	26,863
Telekom	22,344
Henkel	16,740
T-Mobile	15,469
L'Oréal	15,051
Masterfoods	14,056
Danone	13,889
Rewe	13,384
One	13,151
Unilever	13,088

Source: FOCUS Mediaresearch

**Top ten television product  
categories (2007)**

Category	TV expenditure €(000s)
Telecommunications	33,482
Confectionery	15,057
Dairy products	13,713
Auto	9,981
Soft drinks	9,245
Savings banks	8,821
Furniture	8,644
Lotto/sweepstakes	6,902
Haircare	6,726
Cosmetics	5,961

Source: FOCUS Mediaresearch

**Top television  
owners (2007)**

Owner	TV revenue €(mill)
ORF	351
ProSiebenSat.1 Media	96
RTL Group	84
ATV	50
Viacom	7
TIV Kabel	4

Source: FOCUS Mediaresearch

**Top television  
sales houses (2007)**

Sales house	TV revenue €(mill)
ORF Enterprise	351
Seven One Media	96
IPA Plus	84
ATV	50
Goldbach Media	7
GO TV	4

Source: FOCUS Mediaresearch

# NEWSPAPERS

## Newspapers

d=daily w=weekly N=National R=Regional Title	Circulation (000s)	Adult readership (000s)	Full page B/W €	Adult CPT B/W €	Full page Colour €
Kronen-Zeitung Gesamt (d, N)	961	2,947	30,869	10	30,869
HEUTE (W, NÖ, OÖ) (d, R)	530	504	18,496	37	18,496
Österreich Gesamt (d, R)	363	712	14,900	21	14,900
Kleine Zeitung (d, R)	306	821	20,493	25	20,603
Oberösterreichische Rundschau (w, R)	255	604	17,160	28	23,140
Kurier Gesamt (d, N)	238	624	24,422	39	24,422
Salzburger Fenster (w, R)	222	270	9,600	36	12,480
Salzburger Woche (w, R)	186	318	5,250	17	6,825
NÖN (w, R)	184	635	21,000	33	21,000
OÖNachrichten (d, R)	140	349	12,601	36	16,728
Top Tirol (d, R)	137	330	11,795	36	11,795
Die Presse (d, N)	121	267	17,717	66	17,717
Der Standard (d, N)	118	352	15,900	45	18,285
Tiroler Tageszeitung (d, R)	111	304	10,928	36	15,612
Salzburger Nachrichten (d, R)	98	250	10,672	43	14,941
Vorarlberger Nachrichten (d, R)	72	194	6,885	35	9,507
Wirtschaftsblatt (d, N)	42	90	8,568	95	8,568
KTZ-Neue Kärntner Tageszeitung (d, R)	32	57	2,035	36	2,035
NÖ-Rundschau (w, R)	25	85	4,198	49	4,198
NEUE Zeitung für Tirol (d, R)	24	55	1,155	21	1,155
BVZ (w, R)	23	110	3,780	34	3,780
NEUE Vorarlberger TZ (d, R)	13	57	1,328	23	1,944
BF-Burgenland Freizeit (w, R)	10	77	2,400	31	3,360

Source: MA 2007, Regioprint 2007, ÖAK 2007, MAK 2007

**Average CPT (B/W): €27**



AUSTRIA: NEWSPAPERS

**Top ten newspaper advertisers (2007)**

Newspaper expenditure	
Advertiser	€(000s)
Hofer	34,691
Spar	22,428
Media Saturn	18,964
Telekom	15,894
Catro	14,529
Rewe	13,898
Lidl	12,491
Porsche	9,459
T-Mobile	9,324
Bank /CA	7,888

Source: FOCUS Mediaresearch

**Top ten newspaper product categories (2007)**

Newspaper expenditure	
Category	€(000s)
Food	86,922
Marketing/advertising	49,097
Telecommunications	38,451
Savings banks	34,437
Auto	34,977
Exhibitions/events	26,787
Financial assets	28,988
Public institutions	24,604
Travel	19,068
Furniture	17,380

Source: FOCUS Mediaresearch

**Top newspaper owners (2007)**

Owner
Mediaprint
Styria Medien

**Top newspaper sales houses (2007)**

Sales house
Mediaprint
Styria Medien

# MAGAZINES

## Magazines

w=weekly f=fortnightly m=monthly bm=bimonthly	Circulation	Adult readership	Full page Colour	Adult CPT Colour	Full page B/W
Title	(000s)	(000s)	€	€	€
<b>Free</b>					
Week Vorarlberg (f)	616	146	3,450	24	3,450
Das kleine Blatt (w)	496	-	3,588	-	3,588
Wiener Bezirksblatt (m)	116	599	14,700	25	9,800
Oberösterreichische Sonn-Rundschau (w)	101	722	23,770	33	17,610
<b>General interest</b>					
TV Woche (w)	1,443	2,356	31,000	13	29,900
Die Ganze Woche (w)	1,396	932	11,400	12	11,400
Wiener Journal (w)	612	-	2,090	-	2,090
tv media (w)	399	877	14,200	16	14,200
Unsere Generation (m)	293	355	10,500	30	10,500
NEWS (w)	285	771	15,645	20	15,645
ORF nachlese (m)	261	392	7,150	18	5,720
profil (w)	251	363	12,400	34	12,400
E-Media (f)	112	314	11,380	36	11,380
Visa Magazin (bm)	105	504	12,000	24	12,000
Kurier Freizeit (w)	94	500	12,584	25	12,584
tele - Das Fernsehmagazin (w)	22	2,186	32,000	15	32,000
<b>Women's</b>					
Maxima (m)	1,024	205	10,000	49	10,000
Active Beauty (m)	231	558	20,600	37	20,600
Eltern (m)	82	195	9,200	47	9,200
Welt der Frau (m)	74	181	4,930	27	4,930
DIVA (m)	72	88	5,969	68	5,969
Brigitte (f)	71	164	9,200	56	9,200
miss (m)	63	94	5,600	60	5,600
Seitenblicke (w)	55	155	7,900	51	7,900
WOMAN (f)	48	508	14,100	28	14,100
Wienerin (m)	36	279	9,150	33	9,150
<b>Health</b>					
MEDIZIN populär (m)	150	311	6,390	21	6,390
Gesundheit (m)	106	221	12,880	58	10,480
News Leben (m)	90	207	9,650	47	9,650
Gesünder Leben (m)	71	218	4,860	22	4,195
Wellness Magazin (m)	65	93	5,750	62	5,750
<b>Men's</b>					
Autorevue (m)	1,382	395	10,100	26	10,100
Sportwoche (w)	389	146	8,600	59	5,900
Motorradmagazin (m)	82	181	5,600	31	3,600
Land der Berge (m)	76	86	3,790	44	3,790
Freie Fahrt (bm)	52	424	12,000	28	7,800
Auto Touring (m)	50	1,798	20,700	12	13,800
Wiener (m)	45	134	7,190	54	7,190
Sportmagazin (m)	32	266	9,100	34	5,500
CD Austria (m)	25	95	4,490	47	3,790
Alles Auto (m)	20	300	8,900	30	8,900

AUSTRIA: MAGAZINES

**Magazines cont.**

w=weekly f=fortnightly m=monthly bm=bimonthly Title	Circulation (000s)	Adult readership (000s)	Full page Colour €	Adult CPT Colour €	Full page B/W €
<b>Nature/Travelling</b>					
Eurocity (bm)	96	320	8,390	26	8,390
Reisemagazin (m)	70	116	5,600	48	3,700
Universum (m)	52	194	6,390	33	6,390
Geo (m)	32	512	9,900	19	9,900
<b>Business</b>					
Gewinn (m)	80	309	12,810	41	7,320
Report Plus (m)	74	-	8,400	-	8,400
trend (m)	50	347	12,260	35	12,260
Format (w)	50	162	10,130	63	10,130
New Business (bm)	35	35	4,900	140	4,900
<b>Living/Decoration</b>					
Besser Wohnen (m)	74	169	7,770	46	7,770
Wohnen (m)	66	141	5,500	39	5,500
Schöner Wohnen (m)	30	321	9,000	28	9,000
Gusto (m)	28	662	10,100	15	10,100
Gartenmagazin (bm)	-	164	5,500	34	5,500

Source: MA 2007, Regioprint 2007, ÖAK 2007, MAK 2007

**Average CPT (Colour): €25**

## AUSTRIA: MAGAZINES

### Top ten magazine advertisers (2007)

Advertiser	Magazine expenditure €(000s)
News Verlagsgruppe	19,593
Telekom Austria	6,440
Bank Austria/CA	5,096
Raiffeisen Sektor	4,991
Beiersdorf	4,890
ORF	4,883
One	4,165
Porsche	3,462
T-Mobile	3,339
Presse/Infodienst Wien	3,126

Source: FOCUS Mediaresearch

### Top ten magazine product categories (2007)

Category	Magazine expenditure €(000s)
Print media	29,857
Auto	24,442
Telecommunications	20,581
Savings banks	19,714
Cosmetics	10,169
Watches/jewellery	9,194
Electronic media	8,789
Insurance	8,196
Financial assets	7,606
Exhibitions/events	7,391

Source: FOCUS Mediaresearch

### Top magazine owners (2007)

Owner
Verlagsgruppe News
Styria Medien AG

### Top magazine sales houses (2007)

Sales house
Verlagsgruppe News
Styria Medien AG

# RADIO

**Number of radio households: 3,508,000 (99.2%)**

Source: Radiotest

**Number of commercial radio stations: 61**

Source: RTR

**Average daily listening minutes per adult: 203**

Source: Radiotest

## Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) €	Peak adult audience (000s)	30 sec peak adult CPT €
<b>National</b>					
Ö3	music	0800-0900	3,407	737	4.6
RMS Top (?? private stations)	music	1000-1100	1,204	385	3.1
Krone Hit Radio	music	1000-1100	180	72	2.5
FM4	music	1100-1200	148	46	3.2
<b>Main regional</b>					
Radio NÖ	music	0700-0800	501	197	2.5
Radio Steiermark	music	0700-0800	522	157	3.3
Radio Oberösterreich	music	0700-0800	597	148	4.0
Radio Kärnten	music	0700-0900	279	94	3.0
Radio Wien*	music	0900-1000	-	93	-
Radio Tirol	music	0700-0800	360	84	4.3
Radio Salzburg	music	0700-0800	369	73	5.1
Radio Burgenland	music	0700-0800	235	67	3.5
Radio Vorarlberg	music	0800-0900	210	43	4.9

Source: Radiotest

\*There is no advertising between 0800 and 1100 on Radio Wien

**Average CPT (all commercial stations): €4.6**

## Top ten radio advertisers (2007)

Advertiser	Radio expenditure €(000s)
Rewe Austria	7,354
XXXLutz	4,787
Spar	4,541
Kika/Leiner	4,470
National Lottery	4,438
Media Saturn	3,433
Telekom Austria	3,047
Hartlauer	2,906
One	2,894
Hutchison 3G	2,854

Source: FOCUS Mediaresearch

### Top ten radio product categories (2007)

Category	Radio expenditure €(000s)
Auto	11,101
Telecommunications	8,938
Furniture	8,354
Print media	7,410
Food	6,997
Lotto/sweepstakes	4,446
Sports equipment	3,563
DIY	3,532
Electrical equipment	3,391
Perfumery/pharmacy	2,595

Source: FOCUS Mediaresearch

### Top radio owners (2007)

Owner	Radio revenue €(000s)
ORF	109,923
Mediaprint	-
Styria	-

Source: FOCUS Mediaresearch/ZenithOptimedia

### Top radio sales houses (2007)

Sales house	Radio revenue €(000s)
ORF Enterprise	109,923
RMS	36,717
Kronehit	-

Source: FOCUS Mediaresearch/ZO

## OUTDOOR

**Number of outdoor sites\*: 64,540**

\*24-sheet

### Type, size and cost of sites

Type/size of display	Number of sites	Cost per panel per month (€)
Standard	7,068	114
Select	18,761	174
Top	22,581	300
Star	9,356	450
Star Plus	5,554	600
Superstar	1,220	900

Source: KfV (Drive)

## AUSTRIA: OUTDOOR/CINEMA

### Top ten outdoor advertisers (2007)

Advertiser	Outdoor expenditure €(000s)
T-Mobile	5,285
Spar	4,300
Telekom Austria	4,270
One	3,351
Raiffeisen Sektor	3,337
Sparkassen Verband	3,329
Kraft Foods	3,024
Peugeot	3,010
Toyota	2,887
Hutchison 3G	2,811

Source: FOCUS Mediaresearch

### Top ten outdoor product categories (2007)

Category	Outdoor expenditure €(000s)
Telecommunications	21,596
Auto	15,564
Exhibitions/events	8,659
Savings banks	7,148
Soft drinks	6,251
Print media	5,549
Insurance	5,535
Electronic media	5,122
Fashion	4,092
Politics	3,716

Source: FOCUS Mediaresearch

### Top outdoor contractors (2007)

Contractor
EPAMEDIA
Gewista
Anknder/Aussenwerbung
Heimatwerbung
Progress Werbung
All Media
Werbering
Soravia Megaboards

Source: ZenithOptimedia

## CINEMA

### Number of cinema screens: 570

Source: FV der Lichtspieltheater u. Audiovisionsveranstalter

### Average cost of a 60 sec. spot per screen per week: €216

Source: Cinecom PaketKalkulatorDIGITAL

### Average CPT: €191

### Number of screens used in typical national campaign: 229

Source: Cinecom PaketKalkulatorDIGITAL

## AUSTRIA: CINEMA

### Trend in admissions

	Admissions (mill)	Gross takings €(mill)
2002	19.2	90.8
2003	17.7	112.7
2004	19.4	98.1
2005	15.7	78.5
2006	17.3	86.7
2007	15.7	113.0

Source: FV der Lichtspieltheater u. Audiovisionsveranstalter; ZenithOptimedia Austria

### Cinema audience profile

Age	%
16-24	29.6
25-34	20.5
35-49	30.6
50+	11.5
Sex	%
Male	50.5
Female	49.5
Income/Class	%
Level 1	12.4
Level 2	23.0
Level 3	19.6
Level 4	20.1
Level 5	15.9
Level 6	9.0

Source: Media-Analysis

### Top films (2007)

Film	Gross takings €(000s)
POTC 3: At World's End	5,148
Ratatouille	4,968
The Simpsons Movie	4,867
Harry Potter and the Order of the Phoenix	4,550
Shrek 3	3,557
Lissy und der wilde Kaiser	3,406
Mr. Bean's Holiday	3,146
Spider Man 3	2,642
Die Hard 4.0	2,448

Source: WKO/ZenithOptimedia



**Top ten cinema  
advertisers (2007)**

Advertiser	Cinema expenditure €(000s)
National Lottery	811
AMA Agrarmarkt	680
Media Saturn	616
Sony	457
T-Mobile	442
Telekom Austria	424
Red Bull	322
Raiffeisen Sektor	318
Johnson & Johnson	304
UPC Telekabel	299

Source: FOCUS Mediaresearch

**Top ten cinema  
product categories (2007)**

Category	Cinema expenditure €(000s)
Telecommunications	1,561
Lotto/sweepstakes	1,018
Soft drinks	652
Electrical equipment	616
Auto	566
Savings banks	517
Food	506
Associations/clubs	387
Fashion	353
Audiovisual	319

Source: FOCUS Mediaresearch

**Top cinema  
owners (2007)**

Owner
Constantin Film
Kima Cinemas
Kinobetriebs (Pasching)
Ferdinand Purmer Lichtspiel

Source: ZenithOptimedia

**Top cinema  
sales houses (2007)**

Sales house
Cinecom
IP / UNA Film

Source: ZenithOptimedia

## INTERNET

**Homes with internet connection: 1.4 million (39.6%)**

**Adult internet users: 4.86 million (70.1%)**

**Adult internet users with home broadband: 3 million**

**Typical monthly cost of internet access: €25**

**Average minutes spent online per day (adults with internet access):**

Total: 138.7

At home: 84 (est)

At work: 55 (est)

**Cost of display ads**

Type	Typical cost per thousand (€)
Fullbanner	35
Skyscraper	45
ContentAd	50
Bigsizelbanner	50
Advertorial	60
Flap-Fullbanner	40
Flap-Skyscraper	50
Flap-Bigsizelbanner	70
L-Shaped	80
Sitebar	90

Source: ZenithOptimedia records

**Top ten search keywords**

Keyword	Typical cost per click (€)
youtube	0.90 - 1.20
wetter	0.43 - 0.54
gmx	0.35 - 0.48
ebay	0.38 - 0.49
wikipedia	0.46 - 0.67
orf	0.42 - 0.60
google	1.22 - 1.83
spiele	0.36 - 0.46
leo	0.38 - 0.50
herold	0.22 - 0.29

Source: Google Insights for Search, Google Traffic Estimator

**Internet user profile**

Age	%
16-24	20.20
25-34	19.10
35-54	43.80
55-64	8.60
65+	3.10
Sex	%
Male	54.00
Female	46.00
Income/Class	%
A	14.4
B	26.8
C1	23.9
C2	18.4
D	13.3
E	3.2

Source: Media Analyse 2007

### Top ten internet sites (2007)

Site
herold.at
derstandard.at
krone.at
kurier.at
oeamtc.at
diepresse.com
szene1.at
vienna online
willhaben.at
krone.tv

Source: ÖWA Apr-Dec 2007

### Top search engines (2007)

Search engine
Google
Yahoo
T-Online
MSN
AOL
Lycos
Altavista
Web.de

Source: webhits.de April 2007

### Top ten internet advertisers (2007)

Advertiser	Internet expenditure €(000s)
Bwin International	2,981
National lotteries	2,547
T-Mobile	2,320
Hutchinson 3G	1,829
Eduscho	1,618
ONE	1,396
IKEA	1,313
GM	1,244
ING DiBa	1,031
Mobilkom Austria	1,016

Source: Focus, Bruttowerbewert

### Top ten internet product categories (2007)

Category	Internet expenditure €(000s)
Telecommunications	11,570
Lotto/sweepstakes	8,565
Auto	5,197
Savings banks	3,119
IT	2,637
Air travel	2,167
Coffee	1,741
Furniture	1,432
Rental	1,225
Public institutions	1,019

Source: Focus, Bruttowerbewert

### Top ten internet owners (2007)

Owner
orf.at
derstandard.at
NEWS-network
sms.at
KleineZeitung online
krone.at
Kurier Online
sport1.at (laola1.at)
diepresse.com
herold.at

Source: ÖWA

### Top internet sales houses (2007)

Sales house
AdLink
Adworx
austria.com/plus
T-Online.at
Tripple Ad-Locator.net
net:lounge
interactive agency

Source: ÖWA

## MEDIA REACH

### % reach by medium (adults)

	Daily	Weekly	Monthly
Conventional television	64.2	-	-
Newspapers	70.0	-	-
Magazines	-	-	74.3
Radio	82.2	-	-
Outdoor	-	83.1	84.9
Cinema	-	4.3	18.6
Internet	40.4	54.0	56.6

Source: Media-Analysis, Teletest, Radiotest

## OVERALL

### Top ten overall advertisers (2007)

Advertiser	Media expenditure €(mill)
Telekom Austria	57.2
Spar	45.3
Rewe	44.5
T-Mobile	40.6
Hofer KG	37.6
Media Saturn	35.2
ONE	32.8
Raiffeisen Sektor	32.0
Lottery	31.5
News Verlagsgruppe	31.2

Source: FOCUS

### Top ten overall product categories (2007)

Category	Media expenditure €(mill)
Telecommunications	189.7
Auto	131.6
Food	129.5
Finance	106.6
Furniture	78.9
Print media	78.3
Exhibitions/events	72.3
Marketing/print ads	71.0
Lotto/sweepstakes	58.6
Public insitutions	51.3

Source: FOCUS

### Top media owners (2007)

Owner	Media revenue €(mill)
ORF	503
ProSiebenSat.1 Media	100
RTL Group	88
Mediaprint Gruppe	-
Verlagsgruppe News	-
Styria Medien	-

Source: FOCUS

### Top sales houses (2007)

Sales house	Media revenue €(mill)
ORF Enterprise	503
SevenOne Media	100
IP Austria	88
ATV	53
RMS	38
Mediaprint Gruppe	-
Verlagsgruppe News	-
Styria Medien	-

Source: FOCUS

# BELGIUM

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$= 0.73 € at 2007 rate								
<b>Gross Domestic Product (€billion)</b>								
at current prices	252.0	259.0	268.0	275.0	290.0	302.0	317.0	331.0
% change	5.9	2.8	3.5	2.6	5.5	4.1	5.0	4.4
at 2007 prices	290.1	290.9	296.0	299.2	309.1	313.2	322.9	331.0
% change	3.2	0.3	1.8	1.1	3.3	1.3	3.1	2.5
<b>Gross Domestic Product per capita (€000s)</b>								
at current prices	24.7	25.3	26.1	26.6	28.0	29.0	30.4	31.6
at 2007 prices	28.5	28.4	28.8	29.0	29.8	30.1	31.0	31.6
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	344.9	354.5	366.8	376.4	396.9	413.4	433.9	453.1
at 2007 prices	397.0	398.1	405.2	409.5	423.0	428.6	442.0	453.1
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	33.8	34.7	35.7	36.5	38.3	39.7	41.6	43.3
at 2007 prices	39.0	38.9	39.5	39.7	40.8	41.2	42.4	43.3
<b>Population</b>								
Millions	10.2	10.2	10.3	10.3	10.4	10.4	10.4	10.5
<b>Consumer Price Index</b>								
2007=100	86.9	89.0	90.5	91.9	93.8	96.4	98.2	100.0
%change	2.5	2.5	1.7	1.5	2.1	2.8	1.8	1.9
<b>Adspend as a % of GDP</b>								
	0.72	0.68	0.73	0.78	0.80	0.81	0.92	0.95
<b>Advertising Expenditure Growth (%)</b>								
at current prices	8.6	-3.1	10.3	11.0	8.0	4.8	19.1	7.7
at 2007 prices	5.9	-5.5	8.5	9.3	5.8	2.0	17.0	5.7

Source: IFS, ZenithOptimedia

# ADVERTISING EXPENDITURE

## Advertising expenditure in €million at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	1,305	299	214	500	122	21	149	-
1998	1,532	322	238	656	134	23	158	2
1999	1,677	395	248	691	154	25	159	5
2000	1,821	407	245	782	186	25	162	13
2001	1,763	281	258	811	202	28	173	11
2002	1,944	386	269	865	208	23	182	11
2003	2,158	472	271	945	229	25	198	18
2004	2,331	531	282	1,004	253	25	205	32
2005	2,442	592	280	982	290	29	215	55
2006	2,909	876	287	1,071	327	30	227	92
2007	3,132	901	301	1,161	376	26	239	128

## Advertising expenditure in €million at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	1,572	360	258	602	147	26	179	-
1998	1,829	384	284	783	160	27	189	2
1999	1,979	466	293	815	182	29	187	6
2000	2,096	469	282	900	214	29	186	15
2001	1,980	315	289	911	227	31	194	12
2002	2,148	426	297	955	230	25	201	12
2003	2,348	513	295	1,028	249	27	215	20
2004	2,484	566	300	1,070	269	27	218	34
2005	2,532	614	291	1,018	300	30	222	57
2006	2,963	892	292	1,091	333	30	231	94
2007	3,132	901	301	1,161	376	26	239	128

Source: MediaMark Belgium, CIM MDB, IAB

- Notes:
1. Includes agency commission
  2. Excludes production costs
  3. Before discounts
  4. Excludes classified advertising
  5. Newspapers include free regional newspapers from 2006
  6. Internet includes banner ads, skyscrapers, buttons, pop-ups, text links, advertorial, content integration, interstitials, overlays, site relooking, newsletters, email, keyword ads and an estimate for search.

### Main advertising restrictions

**Tobacco:** Prohibited.

**Pharmaceutical:** Only registered medicines with government licences may be advertised.

**Political:** Spending limits for each political party and candidate. Limits on the size and number of posters. No gifts may be given.

## BELGIUM: POPULATION

# POPULATION

<b>Land area (km<sup>2</sup>)</b>	30,278
<b>Capital city</b>	Brussels
<b>Language</b>	Dutch, French
<b>Currency</b>	Euro (€)

Source: CIA Factbook 2008

### Population by age

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
12-14	192	183	376
15-24	649	631	1,280
25-34	689	682	1,371
35-44	801	779	1,580
45-54	764	758	1,522
55-64	608	619	1,227
65+	751	1,056	1,806
<b>Total</b>	<b>4,454</b>	<b>4,708</b>	<b>9,162</b>

Source: CIM PMP 07/08

### Adult status

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
Social group 1-2	1,234	1,204	2,439
Social group 3-4	1,219	1,219	2,439
Social group 5-6	1,043	1,049	2,092
Social group 7-8	935	1,209	2,144
<b>Total</b>	<b>4,432</b>	<b>4,682</b>	<b>9,113</b>

Source: CIM PMP 07/08

#### Definition of adult status:

Social group 1-2 = upper class

Social group 3-4 = upper-middle class

Social group 5-6 = lower-middle class

Social group 7-8 = lower class

# TELEVISION

**Number of households: 4,895,300**

**Number of television households: 4,831,661 (98.7%)**

**Television homes with:**

VCR	74.1%
DVD	70.9%
Teletext	58.0%
Cable (connection) - total	94.2%
Satellite dish (DTH) - total	9.1%

*Source: CIM 2006/2007*

**TV licence cost (per year): none (North)/€150 (South)**

*Note: Fee included in regional tax in Brussels region*

**Average minutes viewed per day per adult: 172 (North)/205 (South)**

**Average pay-TV subscription cost (per month):**

	Average subscription (€)
Cable	12.73
Satellite (basic)	9.90
Satellite (premium)	13.90
DTT (basic)	4.00
DTT (premium)	6.00
IPTV	15.95



## BELGIUM: TELEVISION

### Main channels

Channel	Ad mins per week
<b>North</b>	
<b>Non-commercial</b>	
Een	56
Ketnet/Canvas	30
<b>Commercial</b>	
VTM	857
Kanaal Twee/Tobe	677
VT4	664
Vijf TV	374
Vitaya	321
Nickelodeon/MTV	297
<b>South</b>	
<b>Commercial</b>	
RTL-TVI	727
La Une (Public)	597
Club RTL	489
AB3	446
La Deux (Public)	310
Nickelodeon/MTV	294
Plug TV	193
AB4	188
Be 1	93

Source: CIM Audimetrie

### Cost/audience

Channel	Peak rate 30 sec €	Peak adult audience (000s)	30 sec peak adult CPT €
<b>North</b>			
VTM	8,722	722	12.1
Kanaal Twee/Tobe	2,010	158	12.7
VT4	2,774	149	18.7
Vijf TV	1,308	104	12.6
Vitaya	539	46	11.6
<b>South</b>			
RTL-TVI	6,628	405	16.4
La Une	3,032	248	12.2
Club RTL	1,349	110	12.2
La Deux	613	98	6.3
AB3	519	59	8.9
AB4	169	47	3.6
Plug TV	435	33	13.1
Be 1/ BeTV	208	32	6.4

Source: CIM Audimetrie, Check Up

**Average CPT: €12.8**

BELGIUM: TELEVISION

Share of viewing & ad revenue

Channel	Share of viewing (%)		Ad revenue 2007 €(000s)
	2007 Individuals	2007 Adults	
<b>North</b>			
<b>Non-commercial</b>			
Een	30.2	31.4	40,325
Canvas-Ketnet	9.3	8.4	6,095
<b>Commercial</b>			
VTM	20.7	21.1	336,729
VT4	6.3	6.1	126,129
2Be	5.9	6.0	91,760
Vijf TV	4.2	4.4	40,232
Vitaya	3.5	3.6	18,480
Nickelodeon North	1.6	0.8	14,785
MTV	-	-	5,651
Kanaal Z	-	-	9,802
TMF	-	-	19,791
Jim TV	-	-	13,665
<b>South</b>			
<b>Commercial</b>			
RTL-TVI	19.2	19.7	211,795
La Une	14.9	15.4	76,538
Club RTL	5.0	4.1	42,471
La Deux	4.9	4.8	12,652
AB3	3.8	3.8	14,280
AB4	1.9	2.0	1,749
Plug TV	1.4	1.4	9,298
BE 1	0.4	0.4	1,895
Nickelodeon South	-	-	3,282
MTV Fr	-	-	9,065
Canal Z	-	-	2,543
MCM	-	-	19,875

Source: CIM Audimetrie, CIM MDB

Top ten television programmes (2007)

<b>North</b>		
Programme	Channel	Adult TVR
Witse	Een	31.7
Flikken	Een	28.4
De Pappenheimers	Een	26.3
Fc De Kampioenen	Een	25.6
De Slimste Mens Ter Wereld	Een	25.4
Debby & Nancy's Happy Hour	Een	25.0
Katarakt	Een	24.4
Boer Zkt Vrouw	VTM	22.6
Het Weer	Een	20.3
Sportgala	Een	20.1

Source: CIM Audimetrie

## BELGIUM: TELEVISION

<b>South</b>		
<b>Programme</b>	<b>Channel</b>	<b>Adult TVR</b>
Belgique, Asile Politique	RTL-TVI	22.4
Le Journal De 19 Heures	RTL-TVI	20.0
Edition Speciale	RTL-TVI	20.0
Justine, Une Star, Une Femme	RTL-TVI	18.7
Panne Image	RTL-TVI	17.5
Le Pirette Show	RTL-TVI	16.2
TV Belgiek	RTL-TVI	15.9
Etes-Vous Plus Malin Qu'un Enfant De Primaire?	RTL-TVI	15.7
Les Experts. - Miami	RTL-TVI	15.6
Dr House	RTL-TVI	15.5

Source: CIM Audimetrie

### Top ten television advertisers (2007)

<b>Advertiser</b>	<b>TV expenditure €(000s)</b>
Procter & Gamble	83,756
Danone	54,976
Belgacom	45,270
Unilever	37,010
Public authorities	33,879
Reckitt & Benckiser	31,251
L'Oréal	31,198
Vlaamse Media Maatschappij	22,787
Coca-Cola	21,437
Telenet	18,009

Source: CIM MDB

## BELGIUM: TELEVISION

### Top ten television product categories (2007)

Category	TV expenditure €(000s)
Culture/tourism/leisure	293,459
Food	292,181
Beauty	135,047
Telecoms	85,798
Housekeeping	76,288
Services	63,656
Transport	60,024
Retail	52,589
Health	39,520
Home/office equipment	33,939

Source: CIM MDB

### Top ten television sales houses (2007)

Sales house	TV revenue €(000s)
VMM	442,155
IPB	266,857
SBS	166,361
RMB	132,801
VAR	46,420
MTV	34,508
RTVM	20,676
Vitaya	18,480
ABR	16,029
Roularta	12,345

Source: CIM MDB

# NEWSPAPERS

## Newspapers

F=Free		Adult	Full page	Adult CPT
	Circulation	readership	B/W	B/W
Title	(000s)	(000s)	€	€
<b>North</b>				
Het Laatste Nieuws/De Nieuwe Gazet	339	1,096	22,875	20.9
Het Nieuwsblad/De Gentenaar	241	782	19,045	24.4
Gazet van Antwerpen	128	427	18,380	43.1
Belang van Limburg	113	429	16,110	37.6
De Standaard	102	312	21,330	68.4
Metro NL (F)	127	318	9,200	28.9
Het Volk	78	254	12,035	47.5
De Morgen	71	231	11,800	51.0
De Tijd	46	101	17,150	170.1
<b>South</b>				
Sudpresse	149	624	14,475	23.2
Metro FR (F)	119	516	11,800	22.9
Le Soir	113	445	21,700	48.8
La Dernière Heure/Les Sports	110	510	16,680	32.7
Editions Vers l'Avenir	111	401	11,570	28.8
La Libre Belgique/Gazette de Liège	57	169	12,325	73.1
L'Echo	25	67	11,750	175.9

Source: CIM 2006/2007

**Average CPT (B/W): €37.2**

## Top ten newspaper advertisers (2007)

Advertiser	Newspaper expenditure €(000s)
Corelio	27,859
Lidl	20,397
Public authorities	20,199
D'leteren	15,437
De Persgroep	15,316
Fortis	14,249
Carrefour	14,178
BMW	13,643
Belgacom	10,898
Vlaamse Media Maatschappij	9,696

Source: CIM MDB

## BELGIUM: NEWSPAPERS

### Top ten newspaper product categories (2007)

Category	Newspaper expenditure €(000s)
Culture/tourism/leisure	233,727
Retail	177,558
Services	132,375
Transport	110,310
Home/office equipment	27,870
Telecoms	27,339
Food	10,639
Clothes	9,229
Energy	6,740
Health	5,417

Source: CIM MDB

### Top newspaper sales houses (2007)

Sales house	Newspaper revenue €(000s)
Scripta	351,477
Viarossel	142,565
Viafred	138,456
Concentra	46,009
Trustmedia	27,024
Corelio Connect	24,104
RGP	11,817
Vers L'Avenir	6,028

Source: CIM MDB

# MAGAZINES

## Magazines

w=weekly m=monthly bm=bimonthly FR=French DU=Dutch		Adult	Full page	Adult CPT
Title	Circulation (000s)	readership (000s)	Colour €	Colour €
<b>Women's</b>				
Libelle (w, DU)	267	1,058	10,500	9.9
Flair (w, DU)	176	799	10,085	12.6
Femmes d'Aujourd'hui (w, FR)	130	513	4,500	8.8
Feeling (m, DU)	119	528	9,075	17.2
Goed Gevoel (m, DU)	100	588	6,000	10.2
Evita (m, DU)	91	212	3,500	16.5
Elle België + Elle Belgique (m, DU, FR)	77	461	7,760	16.8
Gael (m, FR)	75	472	5,700	12.1
Flair l'hebdo (w, FR)	62	280	3,300	11.8
Glam'it (m, DU)	59	110	4,500	41.1
Marie-Claire FR (m, FR)	40	239	4,100	17.1
Marie-Claire NL (m, DU)	21	116	3,200	27.5
<b>TV Listings</b>				
Dag Allemaal + Expres (w, DU)	475	1,790	12,100	6.8
Ciné Télé Revue (w, FR)	418	1,783	12,200	6.8
Humo (w, Du)	278	1,205	10,580	8.8
Teve-Blad (w, DU)	193	558	3,230	5.8
Story (w, DU)	188	824	5,000	6.1
TV Familie + Blik	186	518	3,600	7.0
Télépro (w, FR)	159	499	3,700	7.4
Be TV Magazine (m, FR)	155	374	4,100	11.0
Télémostique (w, FR)	142	671	4,800	7.2
Télé Star (w, FR)	133	482	4,125	8.6
Primo/Tv Gids (w, DU)	119	229	2,500	10.9
Télé Pocket (w, FR)	63	192	1,375	7.2
Focus Knack (w, DU)	-	438	5,500	12.6
<b>Youth</b>				
Joepie (w, DU)	84	335	4,500	13.4
Jeune et Jolie (m, FR)	18	77	2,020	26.1
<b>Lifestyle &amp; Travel</b>				
Weekend Knack (w, DU)	142	536	9,600	17.9
Nest (m, DU, FR)	132	583	9,000	15.4
Weekend Le Vif/L'Express (w, FR)	97	320	7,400	23.1
Grande NL+FR (m, DU, FR)	52	203	6,950	34.2
Kreo (m, DU)	49	153	2,490	16.2
Out Soon (m, DU)	45	52	3,000	57.7
Moto (m, DU, FR)	43	216	3,570	16.6
Ambiance FR+NL (m, DU, FR)	40	149	3,900	26.2
Genieten (m, DU)	39	97	4,000	41.1
L'Événement (m, FR)	19	82	2,850	34.9
Voyages Voyages + Elders & Anders (FR, DU)	15	77	3,950	51.6

BELGIUM: MAGAZINES

**Magazines cont.**

w=weekly m=monthly bm=bimonthly FR=French DU=Dutch	Circulation (000s)	Adult readership (000s)	Full page Colour €	Adult CPT Colour €
Title				
<b>News &amp; Pictures</b>				
Knack (w, DU)	142	666	9,600	14.4
Le Vif - L'Express (w, FR)	97	470	7,400	15.8
Royals (m, DU, FR)	81	243	4,400	18.1
Soir Magazine (w, FR)	79	350	3,950	11.3
Point de Vue (w, FR)	54	254	3,000	11.8
Libre Match (w, FR)	53	197	3,900	19.8
<b>Family</b>				
Plus Magazine FR+NL (m, DU, FR)	175	498	6,550	13.1
Brieven aan jonge ouders (m, DU)	17	264	7,500	28.4
Parents (m, FR)	13	124	2,242	18.1
<b>Sport</b>				
Sport Magazine (w, DU, FR)	75	415	5,500	13.3
Play Tennis (m, DU, FR)	13	95	2,500	26.3
<b>Business</b>				
ZO Magazine (bm, DU)	94	109	5,000	45.8
Trends + Trends/Tendances (w, DU, FR)	56	247	8,000	32.4
Bizz NL + Bizz FR (m, DU, FR)	40	95	4,750	50.2
Industrie NL+FR (m, DU, FR)	30	72	4,500	62.5
<b>Home &amp; Decoration</b>				
Actief Wonen + Déco Idées (m, DU, FR)	53	267	4,095	15.3
Feeling Wonen (m, DU)	52	197	4,400	22.3
Gael Maison (m, FR)	47	165	2,750	16.7
Casas (m, DU, FR)	27	103	2,500	24.2
Art & Décoration (m, FR)	27	366	3,950	10.8
Tu Bâtis-Je Rénove, Beter Verbouwen (m, FR, DU)	25	198	2,595	13.1
Elle Décoration (m, FR)	8	93	2,465	26.5
<b>Computing</b>				
Clickx (bm, DU)	38	144	3,600	25.1
<b>Health</b>				
Top Santé (m, FR)	80	626	6,900	11.0
Ma Santé (m, FR)	31	282	3,000	10.6
<b>Men's</b>				
P-Magazine (w, DU)	81	429	4,950	11.5
Ché (m, DU)	35	223	3,950	17.7
Maxim (m, DU)	19	62	3,000	48.5
Menzo (m, DU)	16	97	3,000	30.9
<b>Cars</b>				
Moniteur Automobile (bm, FR)	38	299	4,000	13.4
Autogids (bm, DU)	31	229	4,000	17.5
Autowereld (bm, DU)	24	151	2,650	17.5
<b>Science &amp; Literature</b>				
Eos (m, DU)	48	277	3,850	13.9
Beste uit Reader's Digest (m, DU)	48	193	1,900	9.8
Sélection Reader's Digest (m, FR)	44	211	1,900	9.0



BELGIUM: **MAGAZINES**

**Magazines cont.**

<b>w=weekly m=monthly bm=bimonthly FR=French DU=Dutch Title</b>	<b>Circulation (000s)</b>	<b>Adult readership (000s)</b>	<b>Full page Colour €</b>	<b>Adult CPT Colour €</b>
<b>Associations</b>				
Kerk en Leven (w, DU)	428	900	7,520	8.4
De Bond (w, DU)	284	466	9,090	19.5
Uit Magazine (m, DU)	264	442	6,200	14.0
Touring FR (m, FR)	249	522	6,320	12.1
Touring NL (m, DU)	217	451	4,830	10.7
Dimanche (w, FR)	151	195	2,592	13.3
Vrouwen met Vaart (m, DU)	115	204	2,650	13.0
Vrouw & Wereld (m, DU, FR)	105	214	3,180	14.8
Ligueur (w, FR)	78	223	6,700	30.0
De Boer en de Tuinder (m, DU)	23	85	1,950	23.0

Source: CIM 2006/2007

**Average CPT (Colour): €13.5**

## BELGIUM: MAGAZINES

### Top ten magazine advertisers (2007)

Advertiser	Magazine expenditure €(000s)
Roularta Media	15,167
L'Oréal	8,156
Public authorities	6,905
D'leteren	6,389
Vlaamse Media Maatschappij	4,895
Sanoma Magazines	4,606
De Persgroep	3,610
Corelio	3,168
VRT	3,059
Daimler Chrysler	2,960

Source: CIM MDB

### Top ten magazine product categories (2007)

Category	Magazine expenditure €(000s)
Culture/tourism/leisure	87,699
Services	36,023
Retail	29,480
Clothes	29,333
Home/office equipment	26,949
Transport	26,342
Food	22,723
Beauty	21,863
Health	8,242
Telecoms	5,264

Source: CIM MDB

### Top ten magazine sales houses (2007)

Sales house	Magazine revenue €(000s)
Roularta	101,062
Medialogue	86,538
IPB	45,800
Fred Magazines	27,275
Editions Ventures	13,075
RMB	6,931
Publicarto	5,229
Produpress	4,436
RGP	3,206
VTB - VAB	2,660

Source: CIM MDB

# RADIO

**Number of radio households: 4,567,315 (93.3%)**

Source: Cim 2006/2007

**Number of national commercial radio stations: 8 (North)/10 (South)**

Source: Cim Radio Wave 14+15 (2007)

**Average daily listening minutes per adult: 211 (North)/169 (South)**

Source: Cim Radio Wave 14+15 (2007)

## Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) €	Peak adult audience 15+ (000s)	30 sec peak adult CPT €
<b>National</b>					
<b>North</b>					
Radio 2	generalist	0700-0900	1,633	551	3
Q-Music	music	0700-0900	2,138	299	7
Radio 1	news/generalist	0700-0900	2,228	212	11
Donna	music	0700-0900	1,957	195	10
Studio Brussel	music	0700-0900	775	146	5
4FM	music	0700-0900	613	77	8
Contact	music	0700-0900	315	13	25
TopRadio	music	0700-0900	149	10	14
Klara	classical music	0700-0900	-	-	-
<b>South</b>					
Bel RTL	generalist	0700-0900	1,626	268	6
VivaCité	generalist	0700-0900	1,328	153	9
Contact	music	0700-0900	1,452	150	10
La Première	news/generalist	0700-0900	755	117	6
Nostalgie	music	0700-0900	531	91	6
NRJ	music	0700-0900	414	50	8
Classic 21	music	0700-0900	588	49	12
Fun	music	0700-0900	266	29	9
Pure FM	music	0700-0900	211	29	7
Musiq'3	classical music	0700-0900	166	22	8

Source: CIM Radio Wave 14+15 (2007), Mon-Fri

## Top ten radio advertisers (2007)

Advertiser	Radio expenditure €(000s)
Public authorities	22,087
Belgacom	10,233
D'leteren	6,249
PSA Peugeot Citroen	6,221
France Telecom	6,126
Corelio	5,805
Sanoma Magazines	5,363
Rossel	5,080
KPN Belgium	5,053
Fortis	4,454

Source: CIM MDB

## Top ten radio product categories (2007)

Category	Radio expenditure €(000s)
Culture/tourism/leisure	117,853
Services	69,085
Retail	66,088
Transport	50,203
Telecoms	29,292
Food	20,213
Home/office equipment	12,334
Energy	5,143
Health	2,083
Beauty	1,987

Source: CIM MDB

## Top radio sales houses (2007)

Sales house	Radio revenue €(000s)
VAR	119,996
IPB	109,501
RMB	77,242
QGROUP	68,774

Source: CIM MDB

# OUTDOOR

**Number of outdoor sites: 35,529**

## Type, size and cost of sites

Type/size of display	Number of sites	Cost per panel per month (€)
2m <sup>2</sup> street furniture (13 networks)	23,920	330
20m <sup>2</sup> line by line	5,000	-
20m <sup>2</sup> networks (5 networks)	2,865	-
2m <sup>2</sup> malls (5 networks)	1,000	400
16m <sup>2</sup> MOF (2 networks)	760	1,600
2m <sup>2</sup> railway stations (2 networks)	560	360
2m <sup>2</sup> subway stations (3 networks)	500	380
36m <sup>2</sup> MOF (4 networks)	300	5,000
8m <sup>2</sup> (5 networks)	250	1,150
2m <sup>2</sup> cineposter (3 networks)	214	246
38m <sup>2</sup> prestige (3 networks)	160	3,800

Source: Posterscope Belgium

## Top ten outdoor advertisers (2007)

Advertiser	Outdoor expenditure €(000s)
Ford	7,783
Belgacom	6,609
France Telecom	6,436
Public authorities	6,151
Daimler Chrysler	5,719
KPN	5,459
Toyota	4,896
Fiat	4,894
Renault	4,804
Peugeot Citroen	4,618

Source: CIM MDB

## Top ten outdoor product categories (2007)

Category	Outdoor expenditure €(000s)
Transport	55,509
Food	40,742
Culture/tourism/leisure	35,150
Services	33,217
Retail	24,874
Telecoms	23,778
Beauty	7,672
Clothes	7,049
Home/office equipment	6,712
Energy	2,085

Source: CIM MDB

## Top outdoor contractors (2007)

Contractor	Outdoor revenue €(000s)
Clear Channel	120,250
JCDecaux	99,448
Think Media Outdoor	13,143
Agence Duchene	5,941

Source: CIM MDB

# CINEMA

**Number of cinema screens: 500 (approx)**

Source: Screenvision

**Average cost of a 60 sec. spot per screen per week: €120**

Source: Screenvision

**Number of screens used in typical national campaign: 462**

Source: Screenvision

## Trend in admissions

	Admissions (mill)	Gross takings €(mill)
2002	24.4	128.3
2003	22.7	124.4
2004	24.1	134.3
2005	21.4	121.5
2006	23.8	143.7
2007	22.3	136.2

Source: FCB

## Cinema audience profile

Age	%
16-24	23.7
25-34	20.5
35-49	28.7
50+	16.7
Sex	%
Male	50.2
Female	49.8
Class	%
Social group 1-2	38.3
Social group 3-4	29.7
Social group 5-6	19.1
Social group 7-8	12.3

Source: CIM 2006/2007

## Top ten films (2007)

Film	Gross takings €
Pirates of the Caribbean 3: At World's End	6,627,437
Harry Potter and The Order of the Phoenix	6,452,254
Ratatouille	5,697,870
Shrek the Third	5,162,858
Simpsons: The Movie	3,560,267
Spider-Man 3	3,723,037
Night at the Museum	2,471,992
Mr Bean's Holiday	2,131,202
Die Hard 4.0: Live Free or Die Hard	2,210,533
The Departed	2,616,529

Source: FCB

## BELGIUM: CINEMA

### Top ten cinema advertisers (2007)

Advertiser	Cinema expenditure €(000s)
Coca-Cola	2,679
Bacardi-Martini	2,307
BMW	1,643
Kinepolis	1,543
PSA Peugeot Citroen	1,072
Diageo	790
D'leteren	660
Nestlé	628
Jet Import Frisdranken	583
VRT	580

Source: CIM MDB

### Top ten cinema product categories (2007)

Category	Cinema expenditure €(000s)
Food	9,502
Culture/tourism/leisure	5,349
Transport	4,471
Services	2,439
Beauty	1,310
Telecoms	1,011
Retail	680
Clothes	553
Energy	468
Home/office equipment	146

Source: CIM MDB

### Top cinema sales house (2007)

Sales house	Cinema revenue €(000s)
Screenvision	26,000

Source: CIM MDB



# INTERNET

**Homes with internet connection: 2,647,039 (54.1%)**

Source: ISPA Q4 2007

**Adult internet users: 4,188,000 (60%)**

**Typical monthly cost of internet access: €42**

## Internet user profile 15+

Age	%
12-17	8.6
18-24	15.6
25-34	21.8
35-44	23.0
45-54	18.0
55-64	10.0
65+	3.1
Sex	%
Male	54.3
Female	45.7
Class	%
Social group 1-2	39.6
Social group 3-4	28.5
Social group 5-6	18.4
Social group 7-8	13.5

Source: CIM MetriProfile Nov 07-Apr 08

## Top ten internet sites (2007)

Site	Unique visitors per month
MSN Hotmail	11,796,785
MSN Belgium	8,559,191
Skynet	6,038,741
NETLOG	5,637,264
HLN.be - 7sur7.be	4,122,369
SKYROCK	3,623,986
HLN.be	3,325,247
Zita	3,076,244
Het Nieuwsblad	2,967,364
Kapaza	2,730,430

Source: CIM Metriweb Dec 07

### Top ten internet advertisers (2007)

Advertiser	Internet expenditure €(000s)
3 Suisses	6,243
Public authorities	2,347
Telenet	2,215
Citicorp	2,193
Febiac	2,098
Fortis	2,046
Ford	1,882
PSA Peugeot Citroen	1,846
Unilever	1,731
Belgacom	1,723

Source: CIM MDB

### Top ten internet product categories (2007)

Category	Internet expenditure €(000s)
Services	25,683
Transport	16,481
Culture/tourism/leisure	14,439
Telecoms	6,576
Home/office equipment	5,923
Retail	5,652
Food	4,133
Beauty	2,955
Energy	1,430
Clothes	937

Source: CIM MDB

### Top internet sales houses (2007)

Sales house	Internet revenue €(000s)
Skynet Media	20,077
Beweb	19,648
Adlink	16,552
MSN Media	14,780
Corelio Connect	8,460
Trustmedia	4,467
Paratel	939

Source: CIM MDB

## MEDIA REACH

### % reach by medium (adults 15+)

	Daily	Weekly	Monthly
Conventional television	92.3	98.4	99.2
Newspapers	55.3	-	88.4
Magazines	-	93.0	97.4
Radio	82.2	91.3	93.1
Outdoor	90.1	98.5	99.7
Cinema	-	5.8	44.7
Internet	36.8	52.7	58.0

Source: CIM 2006/2007

## OVERALL

### Top ten overall advertisers groups (2007)

Advertiser Group	Media expenditure €(000s)
Public authorities	92,099
Procter & Gamble	85,788
Belgacom	76,225
Danone	60,249
L'Oréal	43,882
Corelio	42,431
D'leteren	42,342
Vlaamse Media Maatschappij	41,269
Unilever	40,949
PSA Peugeot Citroen	35,037

Source: CIM MDB

### Top ten overall product categories (2007)

Category	Media expenditure €(000s)
Culture/tourism/leisure	787,675
Food	400,132
Services	362,479
Retail	356,921
Transport	323,339
Telecoms	179,057
Beauty	175,379
Home/office equipment	113,873
Housekeeping	79,008
Health	57,307

Source: CIM MDB

### Top ten sales houses (2007)

Sales house	Media revenue €(000s)
VMM	442,155
IPB	422,158
Scripta	351,477
RMB	216,975
VAR	166,417
SBS	166,361
Viarossel	142,565
Viafred	138,456
Clear Channel	120,250
Roularta	113,407

Source: CIM MDB

# DENMARK

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$=	5.44	Krone at 2007 rate						
<b>Gross Domestic Product (DKr billion)</b>								
at current prices	1,294.0	1,335.6	1,372.7	1,400.7	1,466.2	1,548.2	1,641.5	1,695.5
% change	6.6	3.2	2.8	2.0	4.7	5.6	6.0	3.3
at 2007 prices	1,477.7	1,489.5	1,495.6	1,494.3	1,546.1	1,604.4	1,669.3	1,695.5
% change	3.6	0.8	0.4	-0.1	3.5	3.8	4.0	1.6
<b>Gross Domestic Product per capita (DKr 000s)</b>								
at current prices	242.3	249.6	255.6	259.9	271.5	285.6	302.3	311.7
at 2007 prices	276.7	278.4	278.5	277.2	286.3	296.0	307.4	311.7
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	237.7	245.3	252.1	257.3	269.3	284.4	301.5	311.4
at 2007 prices	271.4	273.6	274.7	274.5	284.0	294.7	306.6	311.4
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	44.5	45.9	47.0	47.7	49.9	52.5	55.5	57.3
at 2007 prices	50.8	51.1	51.2	50.9	52.6	54.4	56.5	57.3
<b>Population</b>								
Millions	5.3	5.4	5.4	5.4	5.4	5.4	5.4	5.4
<b>Consumer Price Index</b>								
2007=100	87.6	89.7	91.8	93.7	94.8	96.5	98.3	100.0
% change	2.9	2.4	2.4	2.1	1.2	1.8	1.9	1.7
<b>Adspend as a % of GDP</b>								
	0.89	0.83	0.75	0.74	0.75	0.76	0.83	0.83
<b>Advertising Expenditure Growth (%)</b>								
at current prices	6.4	-3.8	-6.2	0.0	6.5	6.5	16.5	3.0
at 2007 prices	3.4	-6.0	-8.4	-2.1	5.2	4.6	14.4	1.3

Source: IFS, ZenithOptimedia

# ADVERTISING EXPENDITURE

## Advertising expenditure in DKr million at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet	Other
1997	10,635	5,560	626	1,867	174	66	267	-	2,075
1998	11,189	5,805	697	2,010	181	63	273	-	2,160
1999	10,790	5,471	724	1,801	188	48	271	-	2,287
2000	11,162	5,580	724	1,823	213	46	338	-	2,438
2001	11,043	5,238	693	1,747	234	50	343	310	2,428
2002	10,357	4,794	626	1,675	222	70	336	418	2,216
2003	10,352	4,708	617	1,927	216	55	345	486	1,998
2004	11,022	5,013	654	2,125	211	51	359	582	2,027
2005	11,733	5,462	718	2,254	280	57	370	742	1,850
2006	13,673	5,960	807	2,471	283	55	405	1,794	1,898
2007	14,083	6,000	800	2,520	311	59	437	2,422	1,533

## Advertising expenditure in DKr million at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet	Other
1997	13,046	6,821	768	2,290	213	81	328	-	2,546
1998	13,480	6,994	840	2,422	218	76	329	-	2,602
1999	12,682	6,430	851	2,117	221	56	319	-	2,688
2000	12,747	6,372	827	2,082	243	53	386	-	2,784
2001	12,316	5,842	773	1,948	261	56	383	346	2,708
2002	11,284	5,223	682	1,825	242	76	366	455	2,414
2003	11,044	5,023	658	2,056	230	59	368	518	2,132
2004	11,622	5,286	690	2,241	222	54	379	614	2,137
2005	12,159	5,660	744	2,336	290	59	383	769	1,917
2006	13,904	6,061	821	2,513	288	56	412	1,824	1,930
2007	14,083	6,000	800	2,520	311	59	437	2,422	1,533

Source: Dansk Oplagskontrol

Notes: 1. 1997-1998 includes agency commission, 1999 onwards excludes agency commission

2. Excludes production costs

3. Excludes classified advertising

4. After discounts

5. Newspapers includes paid-for and free titles

6. 'Other' includes trade press, annuals and directories

7. Internet advertising includes display, classified and paid search

## DENMARK: POPULATION

# POPULATION

<b>Land area (km<sup>2</sup>)</b>	42,394
<b>Capital city</b>	Copenhagen
<b>Language</b>	Danish
<b>Currency</b>	Krone (DKr)

*Source: CIA Factbook 2008*

### Population by age

	Male (000s)	Female (000s)	Total (000s)
0-15	532	505	1,037
16-24	256	243	499
25-34	298	287	585
35-44	364	352	716
45-54	338	333	671
55-64	343	345	688
65+	358	459	817
<b>Total</b>	<b>2,489</b>	<b>2,524</b>	<b>5,013</b>

*Source: Statistics Denmark*

### Adult status

	Male (000s)	Female (000s)	Total (000s)
AB	671	392	1,063
C1	846	953	1,799
C2	652	799	1,451
D	117	215	332
<b>Total</b>	<b>2,286</b>	<b>2,359</b>	<b>4,645</b>

*Source: Gallup*

#### Definition of adult status:

AB = high social status

C1 = medium social status

C2 = low social status

D = unknown

# TELEVISION

**Number of households: 2,532,000**

**Number of television households: 2,532,000 (100%)**

**Television homes with:**

Colour	100.0%
VCR	59.0%
DVD	70.0%
PVR/DVR	2.1%
Teletext	99.4%
Remote control	98.2%
Cable (connection) - total	66.7%
Satellite dish (DTH) - total	15.3%
Digital satellite dish	11.8%

*Source: Gallup Denmark*

**TV licence cost (per year, if any): DKr 2,200**

**Average minutes viewed per day per adult (12+): 168**

**Average pay-TV subscription cost (per month):**

	Average subscription (DKr)
Cable (analogue)	200
Cable (digital)	200
IPTV	150

*Source: TDC*

## DENMARK: TELEVISION

### Main channels

Channel	Technical penetration (%)	Daily hours of transmission	Ad mins per week
<b>Non-commercial</b>			
DR1	100%	20	-
DR2	91%	10	-
TV2 Film	53%	24	-
<b>Commercial</b>			
TV2	100%	23	1,192
TV3+	65%	24	2,041
TV3	65%	23	2,104
SBS Kanal 5	61%	24	942
TV2 Zulu	61%	21	708
TV2 Charlie	58%	15	564
SBS Kanal 4	55%	23	933
Discovery	52%	22	1,145
TV2 Sport	48%	20	260
MTV	45%	24	1,356

Source: Gallup Denmark

### Cost/audience

Channel	Peak time	Peak rate 30 sec (DKr)	Peak adult audience (000s)	30 sec peak adult CPT (DKr)
TV2	1800-2230	85,800	484	177.3
TV2 Zulu	1800-2230	2,310	32	72.2
TV2 Charlie	1800-2230	2,750	36	76.4
TV2 Sport	1800-2230	1,760	16	110.0
TV3	1800-2230	14,925	77	193.8
TV3+	1800-2230	7,425	54	137.5
SBS Kanal 4	1800-2230	3,553	30	118.4
SBS Kanal 5	1800-2230	3,553	42	84.6
Discovery	1800-2230	1,760	13	135.4
MTV	1800-2230	1,100	4	275.0

Source: Gallup Denmark

**Average CPT (all commercial channels): DKr 158.5**



## DENMARK: TELEVISION

### Share of viewing

Channel	Share of viewing (%) 2007	
	Individuals	Adults
<b>Non-commercial</b>		
DR1	31.0%	29.5%
DR2	5.0%	5.5%
TV2 Film	1.0%	1.3%
<b>Commercial</b>		
TV2	38.7%	39.2%
TV2 Zulu	3.0%	3.0%
TV2 Charlie	3.1%	3.2%
TV2 Sport	1.1%	1.1%
TV3	6.1%	6.2%
TV3+	4.3%	4.4%
SBS Kanal 4	1.4%	1.4%
SBS Kanal 5	3.0%	3.1%
Discovery	1.5%	1.6%
MTV	0.4%	0.4%

Source: Gallup Denmark

### Top ten television programmes (2007)

Programme	Channel	Adult TVR
Krøniken	DR1 DFM/PM	2,491
Forbrydelsen	DR1 DFM/PM	2,107
Handball World Championship semi-final Poland/Denmark	TV 2	1,932
Vild Med Dans - Afgørelsen	TV 2	1,836
Forbrydelsen	DR1 DFM/PM	1,828
Forbrydelsen	DR1 DFM/PM	1,771
Forbrydelsen	DR1 DFM/PM	1,767
Matador	DR1 DFM/PM	1,753
Forbrydelsen	DR1 DFM/PM	1,709
Forbrydelsen	DR1 DFM/PM	1,705

Source: Gallup Denmark

# NEWSPAPERS

## Newspapers

d=daily w=weekly		Adult	Full page	Adult CPT	Full page
	Circulation	readership	B/W	B/W	Colour
Title	(000s)	(000s)	DKr	DKr	DKr
<b>Free</b>					
Søndagsavisen (w)	2,227	1,900	266,413	140	308,697
24Timer (d)	246	294	76,650	261	76,650
metroXpress (d)	228	494	89,790	182	101,990
Urban (d)	208	430	82,848	193	97,455
<b>Morning papers</b>					
Jyllands-Posten (d)	129	493	78,840	160	116,070
Berlingske Tidende (d)	113	344	67,295	196	96,135
Politiken (d)	109	433	107,328	248	133,328
Ekstra Bladet (d)	91	439	71,071	162	48,071
B.T (d)	84	407	72,270	178	72,270
<b>Business</b>					
Dagbladet Børsen (d)	72	211	67,890	322	82,890
Erhvervsbladet (d)	26	70	22,397	320	31,996
<b>Regional newspapers</b>					
Jydske Vestkysten (d)	78	242	57,077	236	57,077
Nordjyske Stiftstidende (d)	62	195	37,121	190	49,121
Fyens Stiftstidende (d)	55	170	23,762	140	32,962
Århus Stiftstidende (d)	28	104	17,739	171	22,739
<b>Other</b>					
Weekendavisen (w)	61	298	67,200	226	80,525
Kristeligt Dagblad (d)	25	103	10,643	103	14,643
Information (d)	22	116	12,593	109	17,193

Source: ZenithOptimedia records

**Average CPT (B/W): DKr 182.3**

# MAGAZINES

## Magazines

w=weekly m=monthly bm=bimonthly q=quarterly	Circulation (000s)	Adult readership (000s)	Full page Colour DKr	Adult CPT Colour DKr
Title				
<b>Women's</b>				
Skøn (m)	102	244	47,900	196
Alt for damerne (w)	72	355	63,000	177
I Form	69	446	39,100	88
Femina (w)	65	321	55,400	173
Woman (m)	49	229	51,000	223
Isabellas (m)	45	216	36,400	169
Costume (m)	42	147	44,800	305
Modemagasinet IN (m)	41	215	45,700	213
Q (m)	40	137	39,490	288
Bazar (m)	34	189	36,740	194
Cosmopolitan (m)	33	136	39,700	292
Eurowoman (m)	29	211	48,000	227
Sirene (m)	24	152	33,500	220
<b>Men's</b>				
M! (m)	46	295	45,800	155
Bil magasinet (m)	42	337	38,200	113
FHM (m)	29	172	37,600	219
Euroman (m)	25	227	48,000	211
Arena (m)	21	66	41,500	629
Gastro (m)	11	52	33,500	644
<b>Bolig/mad</b>				
Bo bedre (m)	84	596	71,200	119
Mad & bolig (m)	38	233	40,900	176
Boligmagasinet (m)	35	167	33,000	198
Spis Bedre (m)	31	144	25,500	177
BoligLiv (m)	29	87	31,900	367
Bolig Eksklusiv (m)	25	107	25,000	234
Mad! (bm)	20	171	29,800	174
Antik & Auktion	18	139	18,700	135
Gastro (10)	11	52	33,500	644
LIVING Design (bm)	8	57	31,800	558
Smag & behag (m)	7	140	18,590	133
<b>Free</b>				
Kiwi magazine (m)	202	467	41,900	90
Film Guide (bm)	191	501	48,000	96
Ud & Se (m)	190	707	50,270	71
Ikea Family (q)	150	363	34,500	95
Premiere (Q)	120	164	29,500	180
Skøn (m)	102	244	47,900	196

DENMARK: **MAGAZINES**

**magazines cont.**

<b>w=weekly m=monthly bm=bimonthly q=quarterly Title</b>	<b>Circulation (000s)</b>	<b>Adult readership (000s)</b>	<b>Full page Colour DKr</b>	<b>Adult CPT Colour DKr</b>
Chili (m)	84	227	42,300	186
Frikvarter (m)	69	171	28,800	168
Tjeck (m)	64	182	35,000	192
KBH	29	44	-	-
Momentum (q)	15	54	28,900	535
<b>Weekly</b>				
Billede Bladet (w)	195	738	56,800	77
Familie Journalen (w)	194	568	63,900	113
Se & Hør (w)	188	848	77,300	91
Ude & Hjemme (w)	162	603	53,800	89
Hjemmet (w)	149	467	39,900	85
Her & Nu (w)	109	371	32,500	88
Søndag (w)	90	391	34,100	87
Kig Ind (w)	67	291	28,500	98
Hendes Verden (w)	45	177	23,500	133
<b>Parents/Children</b>				
Vores Børn	23	149	28,500	191
Gravid - alt om dig	20	63	25,200	400
Vi forældre	17	111	25,500	230
Forældre & Børn (m)	11	81	34,900	431
<b>Business</b>				
Børsen magasin Business (bm)	151	162	47,900	296
Børsens magasin Pleasure (m)	72	118	53,000	449
Berlingske nyhedsmagasin	16	167	41,800	250
Penge & Privatøkonomi (m)	11	281	43,200	154

Source: ZenithOptimedia records

**Average CPT (Colour): DKr 155.2**

# RADIO

**Number of radio households: 1,909,000 (75.4%)**

Source: Gallup Radio Index Q2+3 2008

**Number of commercial radio stations: 36**

Source: Gallup Radio Index Q2+3 2008

**Average daily listening minutes per adult: 130**

Source: Gallup Radio Meter Jan-Sep 2008

## Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) (DKr)	Peak adult audience (000s)	30 sec peak adult CPT (DKr)
<b>National (target ages 19-50):</b>					
Radio 100 fm	AC	1300-1400	2,175	34	64
NOVA fm*	AC	1300-1400	1,460	27	54
The Voice	CHR	1300-1400	429	8	54
Soft fm	Soft AC	1300-1400	447	7	64
Radio City**	Rock (CLR)	1100-1200	304	6	51
<b>Main regional (target ages 12+):</b>					
Radio ABC	AC	1400-1500	525	19	28
Radio alfa	AC	1400-1500	395	18	22
Skala FM	CHR	1300-1400	950	18	53
Hit fm	AC	1400-1500	788	11	72
Guld fm	AC	1400-1500	683	10	68
Radio SLR	AC	1200-1300	669	8	84
VLR Vejle	AC	1200-1300	300	8	38
The Voice Aarhus	CHR	1600-1700	267	8	33
Radio Globus	AC	1100-1200	-	7	-
Radio Horsens	AC	1300-1400	410	7	59
The Voice Fyn	CHR	0900-1000	174	7	25
Radio Sydhavsøerne	AC	1200-1300	233	7	33
Radio 1	AC	0900-1000	250	7	36

Source: Gallup

\*TV 2 Radio was relaunched as NOVA fm sep. 9/2008

\*\*Radio 2 was relaunched as Radio City in February 2008

**Average CPT: DKr 49.8**

## Top ten radio advertisers (2007)

Gross radio expenditure	
Advertiser	DKr (000s)
Danske Spil	9,553.9
Statoil	8,901.6
McDonald's	6,882.0
Shell	5,969.7
TV3	5,327.4
Full Rate	4,853.8
Carlsberg	4,288.7
Totempo	4,067.2
Sydbank	3,694.5
Handelsfinans	3,646.3

Source: Gallup Adfacts

## Top radio owners (2007)

Owner
Talpa Radio
Prosieben Sat1

Source: ZenithOptimedia records

## Top ten radio sales houses (2007)

Sales house
ddr
SBS Radio

Source: ZenithOptimedia records

# OUTDOOR

## Type, size and cost of sites

Type/size of display	Number of sites	Cost per panel per month (DKr)
Hangers bus	2,612	146,272
Abribus Eurosize	940	2,334,960
Left pannels bus 48x480 cr	474	809,592
Rear pannels bus 60x148 c	474	690,144
Billboards 236x333 cm	320	785,920

Source: ZenithOptimedia

## Top ten outdoor advertisers (2007)

Advertiser	Outdoor expenditure DKr (000s)
3F	16,635
Coca Cola	13,571
Tuborg	10,223
Unilever	9,995
TDC	9,974
Royal Unilbrew	9,755
Masterfoods	9,662
Sonofon	9,063
SFFilm	8,531
Fairpoint	8,488

Source:Gallup Adfacts

## Top ten outdoor product categories (2007)

Category	Outdoor expenditure DKr (000s)
Mixed advertising	147,206
electronics/telecoms/IT	81,877
Beverages	53,577
Food	49,693
Travel & transport	45,712
Cars	38,634
Finance & insurance	35,119
Other retail	27,072
Confectionery	23,408
Clothes	22,717

Source:Gallup Adfacts

## Top outdoor contractors (2007)

Contractor
JCDecaux
AFA Trafik Reklame
Clear Channel
Others

Source: AFA JCDecaux

# CINEMA

**Number of cinema screens: 229**

*Source: DRF*

**Average CPT: DKr 390**

**Number of screens used in typical national campaign: 229**

*Source: DRF*

## Trend in admissions

	Admissions (mill)
2002	21.4
2003	20.4
2004	21.2
2005	20.2
2006	20.9
2007	20.1

*Source: Gallup Index Dk*

## Cinema audience profile

Age	%
16-24	30
25-34	29
35-49	25
50+	12
Sex	%
Male	49
Female	51
Income (DKr)/Class	%
>99,999	4
100,000 – 299,999	18
300,000 – 599,999	33
600,000 – 799,999	17
800,000 – 999,999	8
<1,000,000	4

*Source: Film Monitor*



DENMARK: CINEMA

**Top ten films (2007)**

<b>Film</b>	<b>Gross takings (€)</b>
Pirates Of The Carribbean: At World's End	5,562,716
Harry Potter And The Order Of The Phoenix	5,159,355
Shrek The Third	3,795,683
Ratatouille	2,965,249
Die Hard 4.0: Live Free Or Die Hard	2,588,070
The Simpsons Movie	2,424,350
Anja Og Viktor - Brændende Kærlighed	2,416,026
Spider-Man 3	2,242,256
Ledsaget Udgang	1,810,940
Guldhornene	1,689,255

Source: DFI

**Top ten cinema  
advertisers (2007)**

<b>Advertiser</b>	<b>Cinema expenditure DKr (000s)</b>
TDC Mobil	7,657
Haribo	4,722
Coca Cola	4,606
DSB	4,492
Politiken	4,089
Tuborg	3,521
Danske Spil	3,071
Bacardi Martini	2,832
3	2,800
Toms Gruppen	2,788

Source: Gallup Adfact

**Top cinema  
owners (2007)**

<b>Owner</b>
Nordisk Film Biografer
Cinemaxx

Source: DFI

**Top ten cinema  
product categories (2007)**

<b>Category</b>	<b>Cinema expenditure DKr (000s)</b>
Telecommunications	10,458
Liquorice/wine gums	5,836
Soft drinks	4,606
Transport	4,492
Newspapers/magazines	4,089
Oil	3,521
Games/lotteries	3,071
Wine/spirits	2,832
Chocolate	1,206
Confectionery	469

Source: Gallup Adfact

**Top cinema  
sales houses (2007)**

<b>Sales house</b>
Dansk Reklame Film
Fredskilde og Sørensen
Vestmedia

Source: DRF

# INTERNET

**Homes with internet connection: 2,152,200 (85%)**

**Adult internet users: 3,976,000 (95%)**

**Adult internet users with home broadband: 2,780,000 (70%)**

**Typical monthly cost of internet access: DKr 200**

**Average minutes spent online per day (adults with internet access): 12 (home)/18 (work)**

## Cost of display ads

Type	Typical cost per thousand (DKr)
standard banner	30
+ adserving	8

Source: Starcom Digital

## Internet user profile

Age	%
16-24	13.8
25-34	16.9
35-54	35.6
55-64	13.3
65+	7.3
Sex	%
Male	49.9
Female	50.1
Income (DKr)/Class	%
<100,000	6.2
100,000 - 199,000	9.9
200,000 - 299,000	16.8
300,000 - 399,000	18.9
400,000 - 499,000	8.5
500,000 - 599,000	4.4
600,000 - 699,000	1.7
700,000 - 799,000	1.0
800,000 - 899,000	0.6
900,000 - 999,000	0.3
1,000,000 +	0.8

Source: Gemius - August 2008 (31% would not answer)

## Top ten search keywords

Keyword (June)
Benzin (gasoline)
net doktor (danish health website)
Lene Hanson (danish cook book author)
Insekter (insects)
au pair
Ruslana Korshunova
Netborger (danish public citizen portal)
Vanessa Hudgens
Friheden (danish theme park)
parterapi (couple counselling)

Source: Google Zeitgeist

**Top ten internet sites (2007)**

<b>Site</b>	<b>Unique visitors per month</b>
Krak.dk	1,700,000
dr.dk	1,637,000
tv2.dk	1,444,000
dmi.dk	1,429,000
msn.dk	1,308,000
deguldesider.dk	1,272,000
eb.dk	1,250,000
eniro.dk	1,068,000
dba.dk	961,000
rejseplanen.dk	816,000

Source: *fdim.dk*

**Top search engines (2007)**

<b>Search engine</b>
Google
MSN / Live search
Jubii
Yahoo

Source: *ZenithOptimedia records*

**Top ten internet  
sales houses (2007)**

<b>Sales house</b>
Eniro Danmark
JP/Politikens Hus
DR
Berlingske Media
TV2 Interaktiv
Danmark Meteorologiske Institut
Microsoft Danmark
De Gule Sider
Freeway APS
Den Blå Avis

Source: *fdim.dk*

# MEDIA REACH

## % reach by medium (adults)

	Daily	Weekly	Monthly
Conventional television	61.0	90.0	95.0
Newspapers	71.3	90.9	94.9
Magazines	-	62.3	96.3
Radio	81.5	96.3	99.0
Internet	62.0	77.0	80.0

Source: ZenithOptimedia records

# FINLAND

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$= 0.73 € at 2007 rate								
<b>Gross Domestic Product (€billion)</b>								
at current prices	132.3	139.9	144.0	145.9	152.4	157.3	167.0	178.8
% change	9.3	5.7	2.9	1.4	4.4	3.3	6.2	7.0
at 2007 prices	146.3	150.8	152.8	153.6	160.0	163.9	171.4	178.8
% change	5.7	3.1	1.4	0.5	4.2	2.4	4.6	4.3
<b>Gross Domestic Product per capita (€000s)</b>								
at current prices	25.5	26.9	27.7	28.0	29.1	30.0	31.8	33.9
at 2007 prices	28.2	29.1	29.4	29.4	30.6	31.2	32.6	33.9
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	181.0	191.4	197.1	199.8	208.5	215.4	228.6	244.7
at 2007 prices	200.2	206.4	209.2	210.2	219.0	224.3	234.6	244.7
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	35.0	36.9	37.9	38.3	39.9	41.0	43.5	46.3
at 2007 prices	38.7	39.8	40.2	40.3	41.9	42.7	44.6	46.3
<b>Population</b>								
Millions	5.2	5.2	5.2	5.2	5.2	5.3	5.3	5.3
<b>Consumer Price Index</b>								
2007=100	90.4	92.8	94.2	95.0	95.2	96.0	97.5	100.0
% change	3.4	2.6	1.6	0.9	0.2	0.9	1.5	2.6
<b>Adspend as a % of GDP</b>								
	0.85	0.76	0.73	0.74	0.75	0.76	0.74	0.74
<b>Advertising Expenditure Growth (%)</b>								
at current prices	8.0	-5.1	-1.5	2.5	6.6	3.4	4.0	6.3
at 2007 prices	4.4	-7.5	-3.0	1.6	6.4	2.6	2.4	3.6

Source: IFS, ZenithOptimedia

# ADVERTISING EXPENDITURE

## Advertising expenditure in € million at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	876	491	133	190	30	1	29	2
1998	972	540	158	204	34	2	31	4
1999	1,043	594	170	205	34	2	32	6
2000	1,127	637	191	213	38	2	35	12
2001	1,069	599	184	195	40	2	34	15
2002	1,053	580	179	201	44	2	32	15
2003	1,079	596	178	207	48	2	31	17
2004	1,150	632	185	227	48	2	33	23
2005	1,190	643	194	231	47	2	37	36
2006	1,237	661	200	243	47	1	37	48
2007	1,315	690	210	262	47	2	42	61

## Advertising expenditure in € million at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	1,028	576	156	223	36	1	34	2
1998	1,126	625	183	236	39	2	36	4
1999	1,194	680	195	235	39	2	36	7
2000	1,246	705	211	235	41	2	39	13
2001	1,152	646	198	210	43	2	37	16
2002	1,118	616	190	213	47	2	34	16
2003	1,135	627	187	218	51	2	33	18
2004	1,208	664	194	238	50	2	35	24
2005	1,239	670	202	241	49	2	39	37
2006	1,269	678	205	249	48	1	38	49
2007	1,315	690	210	262	47	2	42	61

Source: Gallup Mainostieto/TNS Adex

Notes:

1. Excludes agency commission
2. Excludes production costs
3. Includes classified advertising
4. After discounts
5. Internet includes display and classified, excludes search

### Main advertising restrictions

**Tobacco:** Allowed in professional magazines for people working in the catering industry.

**Alcohol:** Drinks with less than 22% alcohol content can be advertised freely, drinks over that only in professional magazines for people in the catering industry.

**Pharmaceutical:** Only over-the-counter medicines may be advertised (except in professional medical magazines, where all medicines may be advertised).

**Children's:** Ads may not include children talking about a product.

**Political:** May not include negative comments about private individuals.

# POPULATION

<b>Land area (km<sup>2</sup>)</b>	304,473
<b>Capital city</b>	Helsinki
<b>Language</b>	Finnish
<b>Currency</b>	Euro (€)

Source: CIA Factbook 2008

## Population by age

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
0-14	457	438	895
15-24	337	322	659
25-34	338	321	659
35-44	355	343	698
45-54	382	379	761
55-64	373	381	754
65+	355	520	875
<b>Total</b>	<b>2,597</b>	<b>2,704</b>	<b>5,301</b>

Source: Statistics Finland 2007

## Adult status

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
AB	177	95	272
C1	221	237	458
C2	195	522	717
D	511	203	714
E	764	962	1,726
<b>Total</b>	<b>1,868</b>	<b>2,019</b>	<b>3,887</b>

Source: TNS Atlas 2007, 18+ pop.

### Definition of adult status:

AB = directors, private entrepreneurs

C1 = senior white collar

C2 = junior white collar

D = blue collar

E = retired, students, full-time mother/father, unemployed

# TELEVISION

**Number of households: 2,417,000**

**Number of television households: 2,265,000 (93.7%)**

## Television homes with:

Colour	100.0%
VCR	58.0%
DVD	56.0%
PVR	36.0%
Multiset	17.0%
Cable (pass)	43.0%
Cable (connection) - total	43.0%
Digital cable (connection)	25.0%
Digital satellite dish	3.0%
Digital terrestrial television (DTT)	42.0%

Source: Finnpanel Oy, 2007

**TV licence cost (per year): €215.45**

**Average minutes viewed per day per adult: 166**

**Average pay-TV subscription cost (per month):**

	Average subscription €
Cable (digital)	25.0
DTH (digital)	30.0
DTT	25.0
IPTV	35.0

Source: ZenithOptimedia records

## Main channels

Channel	Technical penetration (%)	Ad mins per week
<b>Non-commercial</b>		
YLE1	100	-
YLE2	100	-
<b>Commercial</b>		
MTV3	100	1,723
Nelonen	100	1,103
Sub	100	471
Jim	100	420
Urheilukanava	90	702
Voice	85	-

Source: Finnpanel Oy (Arianna), Digita, SBS



## FINLAND: TELEVISION

### Cost/audience

	Peak	Peak rate 30 sec €	Peak adult audience	30 sec peak adult CPT €
MTV3	1800-2330	4,702	335,024	14.03
Nelonen	1800-2330	2,295	115,668	19.84
Sub	1800-2330	1,505	72,293	20.82
Jim	1800-2330	198	17,763	11.15
Urheilukanava	1800-2330	184	9,914	18.56
Voice	1800-2330	17	4,957	3.43

Source: Finnpanel (Arianna): Gross figures on specific buying - media agency discount (-15%) => the peak rate

**Average CPT (all commercial channels): €16.0**

### Share of viewing

Channel	Share of viewing (%)
	2007 Individuals (All 10+)
<b>Non-commercial</b>	
YLE TV1	23.8
YLE TV2	17.4
YLE Teema	1.3
YLE Extra	0.8
YLE FST5	0.7
<b>Commercial</b>	
MTV3	25.7
Jim	1.3
Sub	6.0
Nelonen	10.2
Jim	1.2
Urheilukanava	1.2
Nelonen Pay	0.1
Voice	0.7
Music Television	0.8
Others	11.2

Source: Finnpanel Oy, 2007

**Top ten television programmes (2007)**

Programme	Channel	Adult TVR
Independence Day Gala	YLE1	42
Eurovision 2007: Final	YLE2	41
TV-News (6th December)	YLE1	38
Strictly Come Dancing	MTV3	32
Ice Hockey World Cup Final	YLE2	32
Idols (28th January)	MTV3	31
TV-News (12th May)	YLE2	28
Parliamentary Elections 2007	YLE1	28
Idols - results (6th April)	MTV3	27
Seven o'clock news (Jan 1st)	MTV3	25

Source: Finnpanel Oy, 2007

**Top ten television advertisers (2007)**

Advertiser	TV expenditure €(000s)
Unilever	11,373
Procter & Gamble	6,834
Danone	5,706
L'Oréal	5,199
Teliasonera	4,912
Valio	4,549
MTV3	4,079
Nelonen	3,447
Sub	3,116
Jim	2,997

Source: TNS Gallup

**Top ten television product categories (2007)**

Category	TV expenditure €(000s)
Food	54,003
Trade groups/retailers	33,503
Telecommunications	17,858
Cosmetics	17,105
Pharmaceuticals	15,707
Motor vehicles/accessories	15,388
Entertainment	12,896
Press publishers	9,659
Home electronics	9,346
Banks/finance	9,003

Source: TNS Gallup

**Top television sales house (2007)**

Sales house	TV revenue €(mill)
Nelonen Media	83.2

Source: MTV3 / Sanoma WSOY

# NEWSPAPERS

## Newspapers

Title	Circulation (000s)	Adult readership (000s)	Full page B/W €	Adult CPT B/W €	Full page Colour €
<b>Dailies</b>					
Helsingin Sanomat	420	995	17,174	17.3	23,148
Ilta-Sanomat	177	767	6,600	8.6	6,600
Aamulehti	139	313	20,286	64.8	20,286
Ilta-lehti	131	675	5,150	7.6	5,150
Turun Sanomat	112	257	13,832	53.8	22,932
Kaleva	82	201	13,062	65.0	14,574
Kauppalähti	81	182	15,300	84.1	15,300
Keskisuomalainen	75	180	9,588	53.3	12,036
Savon Sanomat	65	167	9,017	54.0	11,342
Etelä-Suomen Sanomat	61	135	10,200	75.6	13,056
Satakunnan Kansa	55	137	5,865	42.8	5,865
Ilkka	55	134	12,648	94.4	12,648
Hufvudstadsbladet	51	121	4,900	40.5	4,900
Karjalainen	47	118	9,751	82.6	9,751
Lapin Kansa	35	90	9,016	100.2	11,057
Etelä-Saimaa	32	78	7,834	100.4	9,343
Hämeen Sanomat	30	73	8,242	112.9	9,751
Pohjalainen	29	83	11,832	142.6	11,832
Kouvola Sanomat	28	70	7,344	104.9	8,813
Keskipohjanmaa	27	80	10,200	127.5	10,200
Länsi-Savo	26	65	4,303	66.2	4,303
Kymen Sanomat	25	62	7,834	126.4	9,384
Vasabladet	24	62	8,272	133.4	9,588
Pohjolan Sanomat	22	58	7,507	129.4	8,813
Aamuposti	22	51	7,630	149.6	7,630
Salon Seudun Sanomat	22	57	4,500	78.9	4,500
Kainuun Sanomat	22	61	7,303	119.7	8,690
Keski-Uusimaa	21	53	7,140	134.7	7,140
Uutispäivä Demari	18	35	5,475	156.4	5,475
Itä-Savo	18	45	4,250	94.4	4,514
Länsi-Suomi	16	45	7,140	158.7	9,343
Forssan lehti	14	40	5,182	129.6	6,814
Iisalmen Sanomat	14	43	1,770	41.2	1,770
Länsi-Uusimaa	13	40	7,466	186.7	9,425
Uusimaa	13	40	5,916	147.9	5,916
Jakobstads Tidning	12	36	4,896	136.0	4,080
<b>Weeklies</b>					
Maaseudun Tulevaisuus (2w)	84	310	12,240	39.5	16,116
Kotimaa	34	93	3,500	37.6	3,900

Source: ZenithOptimedia records

**Average CPT (B/W): €52.9**

## FINLAND: NEWSPAPERS

### Top ten newspaper advertisers (2007)

Newspaper expenditure	
Advertiser	€ (000s)
Suomi-Soffa	9,992
Huoneistokeskus	7,299
Kiinteistömaailma	6,685
Teliasonera	6,559
OP-Kiinteistökeskus	5,599
Elisa	4,410
VV-Auto	4,302
Toyota-Auto	4,218
General Motors Finland	3,472
Asko	3,393

Source: Adweb

### Top ten newspaper product categories (2007)

Newspaper expenditure	
Category	€ (000s)
Retail	212,146
Motor vehicles	74,764
Property	54,253
Recruitment	48,372
Furniture/decorating	28,470
Entertainment	26,168
Transport/tourism	21,190
Other advertising	19,253
Telecommunications	18,234
Education	12,277

Source: Adweb

### Top ten newspaper owners (2007)

Owner
Sanoma WSOY
TS-Yhtymä
Alma Media
Talentum
Keskisuomalainen
Suomen Lehtiyhtymä
Pohjois-Karjalan Kirjapaino
Länsi-Savo
Kaleva Kustannus
Ilkka

Source: Professional Magazine "Markkinointi & Mainonta"

### Top newspaper sales house (2007)

Sales house
Kärkimedia

# MAGAZINES

## Magazines

w=weekly m=monthly	Circulation	Adult	Full page	Adult CPT
Title	(000s)	readership	Colour	Colour
	(000s)	(000s)	€	€
<b>Consumer</b>				
Yhteishyvä (w)	1,537	1,765	12,370	7.0
Pirkka (w)	1,482	2,612	13,050	5.0
Me Ykkösbonus (w)	900	901	6,655	7.4
Terveysteksti!	450	1,219	7,650	6.3
<b>General interest</b>				
Hymy (m)	904	399	2,980	7.5
ET-lehti (m)	259	798	8,630	10.8
7 päivää (w)	247	782	8,100	10.4
Valitut Palat (m)	223	631	6,920	11.0
Apu (w)	216	661	7,800	11.8
Seura (w)	190	679	7,950	11.7
Suomen Kuvalehti (w)	102	357	6,040	16.9
<b>Television</b>				
Katso (w)	63	175	3,600	20.6
<b>Children's &amp; youth</b>				
Aku Ankka (w)	324	1,033	10,500	10.2
Demi	53	165	3,600	21.8
Suosikki (m)	46	207	4,450	21.5
<b>Women's general interest</b>				
Kodin Kuvalehti (f)	183	583	8,860	15.2
Kotiliesi (m)	153	457	6,550	14.3
Me Naiset(w)	134	403	6,730	16.7
Anna (w)	120	357	6,560	18.4
Kotivinkki (m)	119	406	6,800	16.7
Eeva (m)	94	371	5,700	15.4
Cosmopolitan	73	237	5,640	23.8
Trendi	63	176	5,070	28.8
Gloria (m)	61	270	7,600	28.1
<b>Women's special interest</b>				
Hyvä Terveys (m)	136	441	5,400	12.2
Kauneus ja Terveys (m)	74	378	6,600	17.5
Kotilääkäri (m)	54	195	3,540	18.2
Voi Hyvin (m)	47	278	4,100	14.7
Meidän Perhe	45	153	5,200	34.0
Glorian ruoka&viini (bm)	39	157	5,300	33.8
Vauva	37	168	4,500	26.8
Kunto Plus	35	155	3,700	23.9

FINLAND: MAGAZINES

**magazines cont.**

<b>w=weekly m=monthly</b>	<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>	<b>Full page</b>	
<b>Title</b>	<b>Circulation</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>	
	<b>(000s)</b>	<b>(000s)</b>	<b>€</b>	<b>€</b>	
				<b>B/W</b>	
				<b>€</b>	
<b><i>Motoring &amp; engineering</i></b>					
Tekniikan Maailma (m)	151	652	8,140	12.5	-
Tuulilasi (m)	86	493	6,800	13.8	-
Moottori	83	192	4,800	25.0	-
GTI-Magazine (m)	49	248	2,950	11.9	-
V8 Magazine (m)	34	219	2,470	11.3	-
Vauhdin Maailma	24	161	2,430	15.1	-
<b><i>Lifestyle &amp; gardening</i></b>					
Avotakka (m)	85	442	6,800	15.4	-
Viherpiha (8/year)	77	360	5,300	14.7	-
Koti ja Keittiö	76	184	4,800	26.1	-
Meidän Talo (m)	67	332	5,350	16.1	-
Glorian koti	58	163	5,220	32.0	-
Meidän Mökki (8/year)	47	231	4,300	18.6	-
Glorian antiikki (bm)	35	181	4,100	22.7	-
<b><i>Science</i></b>					
Tieteen Kuvalehti	58	446	3,400	7.6	-
Tiede	58	225	3,510	15.6	-
National Geographic	15	99	3,900	39.4	-
<b><i>IT</i></b>					
Mikrobitti	100	315	5,430	17.2	-
Tietokone	43	134	6,300	47.0	-
Pelit	32	158	2,990	18.9	-
MikroPC	32	136	6,320	46.5	-
<b><i>Hobbies</i></b>					
Koiramme	124	358	3,980	11.1	2,000
Caravan (bm)	55	135	2,585	19.1	1,790
Erä	48	312	2,600	8.3	-
Metsästys ja Kalastus	44	415	2,490	6.0	-
Matkaopas	43	142	3,620	25.5	-
Vene	26	143	2,600	18.2	-
Suomen Luonto	26	115	2,375	20.7	-
<b><i>Economics</i></b>					
Taloustaito	209	209	4,275	20.5	-
Tekniikka&Talous	104	108	9,470	87.7	-
Kauppalehti Optio (f)	87	219	8,500	38.8	-
Talouselämä	79	174	9,470	54.4	-

Source: aikakauslehdet.fi / readership: KMT S07/K08 / Circulations 2007

**Average CPT (Colour): €14.1**

## FINLAND: MAGAZINES

### Top ten magazine advertisers (2007)

Advertiser	Magazine expenditure €(000s)
L'Oréal	3,456
Valio	2,324
Unilever	1,831
Orion Pharma	1,658
Toyota	1,656
Berner	1,401
Procter & Gamble	1,347
Vv-Auto	1,302
Beiersdorf	1,301
Elisa	1,175

Source: AdWeb

### Top ten magazine product categories (2007)

Category	Magazine expenditure €(000s)
Motor vehicles/gears	15,347
Groceries	14,066
Medicine	13,084
Recruitment	10,658
Retail	9,338
Cosmetics	9,316
Construction	6,045
Clothing	5,401
Telecommunications	5,398
Travelling/transport	5,042

Source: Adweb

### Top ten magazine owners (2007)

Owner	Magazine revenue €(mill)
Sanoma	202.8
Yhtyneet Kuvalehdet	149.6
A-lehdet	96.4
Aller Julkaisut	55.0
Talentum Media	50.1
Oy Valitut Palat	28.2
Bonnier	22.1
Egmont	19.9
Forma Publishing Group	17.6
Kolmiokirja	3.6

Source: aikakauslehdet.fi

# RADIO

**Number of radio households: 2,417,000 (100%)**

Source: RAB Finland

**Number of commercial radio stations: 56**

Source: RAB Finland

**Average daily listening minutes per adult: 196**

Source: RAB Finland

## Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) (€)	Peak adult audience (000s)	30 sec peak adult CPT (€)
<b>National</b>					
Radio Nova	Music	0600-1800	482	357	1.4
<b>Main regional</b>					
SBS Iskelmä	Music	0600-1800	430	236	1.8
SuomiPOP	Music	0600-1800	199	166	1.2
NRj	Music	0600-1800	200	107	1.9
The Voice	Music	0600-1800	148	106	1.4
Radio Rock	Music	0600-1800	268	157	1.7
Radio Aalto	Music	0600-1800	75	53	1.4

Source: KRT Finnpanel

**Average CPT: €1.5**

## Top ten radio advertisers (2007)

Advertiser	Radio expenditure (€(000s))
Neste Oil	610
Tallink silja	565
Op-Pohjola	558
If Vahkinkovakuutus	528
Eniro Finland	522
Toyota Auto	510
Shell	440
Fonecta	426
Orion Pharma	392
Sw Television	392

Source: TNS-gallup



## Top ten radio product categories (2007)

Category	Radio expenditure €(000s)
Retail	5,618
Motor Vehicles	4,097
Travel	3,361
Groceries	3,286
Entertainment	2,833
Oil/energy	2,026
Banks/finance	1,922
Public services	1,898
Media	1,746
Medicines	1,586

Source: TNS-Gallup

## Top ten radio owners (2007)

Owner	Radio revenue €(000s)
Radio Nova	15.3
Iskelmä Radio	7.3
NRJ	3.7
Radio Rock	2.4
The Voice	2.0
Cityradiot	2.0
SuomiPOP	1.1
Radio Voima/Radio 99	1.0
Metro FM	0.7
Radio Aalto	0.7

Source: RAB Finland

## Top radio sales houses (2007)

Sales house	Radio revenue €(000s)
SBS	25.0
NRJ	9.0
Nelonen media	8.0
Mediasales Finland	7.0
4 Radio Oy	0.5

Source: Rab Finland

# OUTDOOR

## Number of outdoor sites: 100,000

Source: ZenithOptimedia estimate

## Type, size and cost of sites

Type/size of display	Number of sites	Cost per serie per month (€)
<i>JCDecaux</i>		
Lamp post panels	13,538	118,200
Abribus citymedia	10,315	276,800
Columns	3,695	111,120
Citylite	488	28,960
Billboards	440	82,720
<i>ClearChannel</i>		
Adshel	1,390	172,800
Billboards	440	51,700
Big light	284	73,800

Source: JCDecaux/ClearChannel

## Top ten outdoor advertisers (2007)

Advertiser	Outdoor expenditure €(000s)
Hennes & Mauritz	390
Ikea	265
Elisa	233
Teliasonera	93
Teboil	93
Marimekko	72
Abc Liikenneasema	60
Nordisk Film	36
Iittala Group	26
Nokia	12

Source: TNS Adweb

### Top ten outdoor product categories (2007)

Category	Outdoor expenditure €(000s)
Trade groups/retail	3,327
Clothing	355
Telecommunications	327
Furniture	269
Oil/energy	187
Household utensils	124
Food	98
Motor vehicles/accessories	73
Fabric/sewing equipments	72
Home electronics	53

Source: TNS Adweb

### Top outdoor contractors (2007)

Contractor	Outdoor revenue €(mill)
JC Decaux Finland	28
Clear Channel	14

Source: Markkinointi&Mainonta

## CINEMA

### Number of cinema screens: 316

Source: the Finnish Film Foundation 2007

### Average cost of a 60 sec. spot per screen per week: €160

Source: Clear Channel

### Average CPT: €112

### Number of screens used in typical national campaign: 75

Source: the Finnish Film Foundation

### Trend in admissions

	Admissions (mill)	Gross takings €(mill)
2002	7.7	55.0
2003	7.7	56.4
2004	6.9	51.8
2005	6.1	44.9
2006	6.7	50.3
2007	6.5	50.8

Source: Finnish Film Foundation

**Cinema audience profile**

<b>Age</b>	<b>%</b>
16-24	56%
25-34	25%
35-49	11%
50+	9%
<b>Sex</b>	<b>%</b>
Male	48%
Female	52%
<b>Income (€ monthly)/Class</b>	<b>%</b>
<1500	34%
1500-2499	25%
2500-4000	22%
4001-6000	11%
6001+	8%

Source: Clear Channel/Rian Oy

**Top ten films (2007)**

<b>Film</b>	<b>Gross takings €(000s)</b>
The Simpsons Movie	3,259
Pirates of the Caribbean	3,036
Harry Potter and the Order of the Phoenix	2,926
Mr Bean's Holiday	2,396
Ratatouille	1,870
Shrek the Third	1,783
Christmas Story	1,753
V2 Dead Angel	1,541
Ganes	1,409
Casino Royale	1,066

Source: Finnish Film Foundation

**Top ten cinema  
advertisers (2007)**

<b>Advertiser</b>	<b>Cinema expenditure €(000s )</b>
Hartwall	147
Unilever Finland	80
Nordisk Film	79
Valio	75
Sony Finland	70
Coca-Cola Finland	69
Gustav Paulig	62
TeliaSonera	60
Beiersdorf	55
Veikkaus	52

Source: Adweb

## Top ten cinema product categories (2007)

Category	Cinema expenditure €(000s)
Food	655
Home electronics	275
Cosmetics	184
Public services	173
Telecoms	171
Travel/transport	113
Media publishers	83
Insurance	80
Office technology & equipment	52
Gambling/lottery	52

Source: Adweb

## Top cinema owner (2007)

Owner
Finnkino

Source: PMI

## Top cinema sales house (2007)

Sales house	Cinema revenue €(mill)
Clear Channel	2.3

Source: Clear Channel

# INTERNET

**Homes with internet connection: 1,740,240 (71%)**

**Adult internet users: 83%**

Source: Statistics Finland

**Adult internet users with home broadband: 64%**

Source: Statistics Finland

**Typical monthly cost of internet access: €24.90**

Source: Elisa.fi

## Average minutes spent online per day (adults with internet access): 81

Source: TNS Atlas 2007

### Cost of display ads

Type	Typical cost per thousand (€)
banner	6
streaming video*	6

Source: PMI

\* if voice is used +20%

### Internet user profile

(users by % of demographic group)

Age	%
15-24	81
25-34	81
35-54	65
55-64	45
65+	16
Sex	%
Male	61
Female	53
Income per year (€)	%
<20,000	37
20,001 - 35,000	49
35,001 - 50,000	67
50,001 - 75,000	71
75,001 - 100,000	80
Over 100,000	75

Source: TNS Atlas 2007

### Top ten internet sites (2007)

Site	Unique visitors per month
Ilta-Sanomat	1,399,635
Ilta-lehti	1,389,976
MTV3	1,221,914
YLE	1,084,980
MSN/Windows Live Messenger	1,002,350
Helsingin Sanomat	973.472
MSN.fi	808.755
IRC-Galleria	802.016
Eniro.fi	559.357
NettiX	518.200

Source: TNS Metrix, w33/2008

**Top search engines (2007)**

Search engine
Google
MSN live search
Yahoo
Webinfo

Source: ZenithOptimedia records

**Top ten internet advertisers (2007)**

Advertiser	Internet expenditure €(000s)
Microsoft	507
Teliasonera	497
Op-Pohjola	457
If Vahinkovakuutus	402
Canon	371
Finnair	343
Elisa	333
Sampo Pankki	286
Eniro Finland	264
Hewlett-Packard	264

Source: TNS Gallup Adweb

**Top ten internet product categories (2007)**

Category	Internet expenditure €(000s)
Recruitment	11,463
Property	8,043
Vehicles	6,815
Travel	2,452
Banks/finance	2,307
Media	2,287
Groceries	1,930
Retail	1,728
Information technology	1,618
Telecommunication services	1,220

Source: TNS Gallup Adweb

## MEDIA REACH

### % reach by medium (adults)

	Daily	Monthly
Conventional television	88.0	97.0
Newspapers	77.0	93.0
Magazines	49.0	97.0
Radio	76.0	94.0
Cinema	1.0	14.0
Internet	56.0	74.0

Source: TNS Atlas 2007, all 15+

## OVERALL

### Top ten overall advertisers (2007)

Advertiser	Media expenditure €(000s)
Unilever	15,501
Teliasonera	13,290
Suomi-Soffa	10,881
Elisa	10,833
L'Oréal	9,892
Toyota	9,541
Vv-Auto	8,958
Procter & Gamble	8,740
Valio	8,529
Huoneistokeskus	7,538

Source: TNS Media Intelligence/Adex

### Top ten overall product categories (2007)

Category	Media expenditure €(000s)
Retail	265,705
Motor vehicles	118,853
Food	88,752
Recruitment	71,024
Property	64,578
Entertainment	47,847
Telecommunications	45,485
Transport/tourism	42,597
Furniture/interiors	36,528
Medicine	36,341

Source: TNS Media Intelligence/Adex



## FRANCE

## ECONOMIC DATA

## Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$= 0.73 € at 2007 rate								
<b>Gross Domestic Product (€billion)</b>								
at current prices	1,441	1,497	1,549	1,595	1,660	1,726	1,808	1,868
% change	5.5	3.9	3.4	3.0	4.1	4.0	4.7	3.3
at 2007 prices	1,635	1,669	1,696	1,709	1,743	1,779	1,835	1,868
% change	3.7	2.1	1.6	0.8	2.0	2.1	3.1	1.8
<b>Gross Domestic Product per capita (€000s)</b>								
at current prices	24.4	25.2	25.9	26.5	27.4	28.3	29.5	30.3
at 2007 prices	27.6	28.1	28.3	28.4	28.8	29.2	29.9	30.3
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	1,973	2,049	2,120	2,183	2,272	2,363	2,474	2,557
at 2007 prices	2,237	2,285	2,321	2,340	2,386	2,436	2,512	2,557
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	33.3	34.4	35.4	36.2	37.5	38.7	40.3	41.5
at 2007 prices	37.8	38.4	38.8	38.8	39.4	39.9	41.0	41.5
<b>Population</b>								
Millions	59.2	59.5	59.9	60.2	60.6	61.0	61.3	61.7
<b>Consumer Price Index</b>								
2007=100	88.2	89.7	91.3	93.3	95.2	97.0	98.5	100.0
% change	1.7	1.7	1.8	2.1	2.1	1.9	1.5	1.5
<b>Adspend as a % of GDP</b>								
	0.65	0.59	0.56	0.55	0.56	0.56	0.55	0.54
<b>Advertising Expenditure Growth (%)</b>								
at current prices	1.5	-5.8	-2.0	2.1	5.2	3.0	3.8	2.1
at 2007 prices	-0.2	-7.4	-3.8	-0.1	3.1	1.2	2.2	0.5

Source: IFS, ZenithOptimedia

# ADVERTISING EXPENDITURE

## Advertising expenditure in €million at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	7,755	1,176	2,702	2,315	543	47	967	5
1998	8,390	1,385	2,861	2,473	575	52	1,026	17
1999	9,256	1,627	3,064	2,684	645	68	1,089	79
2000	9,396	1,804	2,435	3,045	715	80	1,173	144
2001	8,847	1,653	2,357	2,866	655	72	1,129	115
2002	8,671	1,546	2,233	2,921	713	74	1,085	99
2003	8,850	1,496	2,153	2,834	744	65	1,056	502
2004	9,310	1,536	2,140	3,204	785	67	1,083	495
2005	9,592	1,560	2,108	3,236	795	78	1,083	732
2006	9,952	1,576	2,099	3,382	807	82	1,085	921
2007	10,158	1,536	2,025	3,510	767	89	1,102	1,129

## Advertising expenditure in €million at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	9,047	1,372	3,152	2,701	634	55	1,128	6
1998	9,729	1,606	3,318	2,869	667	61	1,189	20
1999	10,677	1,876	3,535	3,096	744	79	1,256	91
2000	10,655	2,046	2,761	3,453	811	91	1,330	163
2001	9,865	1,843	2,628	3,196	730	81	1,259	128
2002	9,494	1,693	2,445	3,198	781	81	1,188	108
2003	9,485	1,604	2,308	3,038	797	70	1,131	538
2004	9,775	1,613	2,247	3,364	824	70	1,137	519
2005	9,888	1,608	2,173	3,336	820	80	1,116	754
2006	10,103	1,600	2,131	3,433	819	83	1,102	935
2007	10,158	1,536	2,025	3,510	767	89	1,102	1,129

Source: IREP

- Notes:
1. 15% agency commission included
  2. Excludes production costs and taxes
  3. Includes classified advertising
  4. After discounts
  5. Newspapers include national and regional titles; 2006 figure includes free magazines.
  6. Magazines include free titles between 1997 and 1999
  7. TV includes cable and satellite
  8. Internet includes display, classified and search

# POPULATION

Land area (km <sup>2</sup> )	545,630
Capital city	Paris
Language	French
Currency	Euro (€)

Source: CIA Factbook 2008

## Population by age

	Male (000s)	Female (000s)	Total (000s)
0-15	6,142	5,859	12,001
16-24	3,580	3,484	7,064
25-34	4,035	4,006	8,041
35-44	4,306	4,383	8,689
45-54	4,101	4,260	8,361
55-64	3,371	3,482	6,853
65+	4,124	5,911	10,035
Total	29,659	31,385	61,045

Source: INSEE, France Métropolitaine

## Adult status

	Male (000s)	Female (000s)	Total (000s)
AB	5,422	3,998	9,420
C1	2,888	6,488	9,376
C2	5,669	1,480	7,149
D	441	211	652
E	9,069	13,244	22,313
Total	23,489	25,421	48,910

Source: INSEE, France Métropolitaine

### Definition of adult status:

AB = higher and intermediate managerial

C1 = employee/retail

C2 = skilled and unskilled manual

D = agricultural

E = unemployed/retired

# TELEVISION

**Number of households: 27,690,000**

**Number of television households: 25,284,000 (91.3%)**

## Television homes with:

Colour	97.5%
VCR	63.0%
DVD	85.0%
PVR/DVR	7.3%
Teletext	67.6%
Cable (pass)	15.1%
Cable (connection) - total*	10.1%
Digital cable (connection)	5.7%
Digital satellite dish	14.9%
Digital terrestrial television (DTT)	34.5%
IPTV	11.0%

Source: Médiamétrie Jan-Mar 2008

\*Households receiving more than 15 channels via cable

**TV licence cost (per year): €116**

**Average minutes viewed per day per adult: 219**

**Average pay-TV subscription cost (per month):**

	Average subscription (€)
Cable (analogue)	30.0
Cable (digital)	19.0
DTT (TNT Payante)	8-10
IPTV (with Free box)	29.99

Source: ZenithOptimedia records

## FRANCE: TELEVISION

## Main channels 2007

Channel	Technical penetration (%)	Daily hours of transmission	Ad mins per week
<b>Non-commercial</b>			
Arte	91	8	-
<b>Commercial</b>			
TF1	100	24	799
France2	100	24	499
France3	100	21	449
Canal+	80	24	104
France5	91	16	263
M6	93	24	756
<b>Top 10 Other channels (TNT/Jan-Feb 2008)</b>			
TMC	62.8	24	683
I-TELE	56.8	24	782
France 4	56.8	24	160
W9	56.2	24	511
NT1	56.2	24	511
NRJ12	56.2	24	464
Gulli	56.2	24	159
Virgin 17 (ex Europe 2 TV)	56.2	24	359
Direct 8	56.2	24	221
BFM TV	56.2	24	568

Source: TNS Media Intelligence, Médiamétrie

## Cost/audience

Channel	Peak time	Peak rate 30 sec (€)	Peak adult audience 15+ (000s)	30 sec peak adult CPT (€)
TF1	2000-2200	55,856	7,209	7.7
France2	2000-2200	42,695	4,335	9.8
France3	1900-2000	20,937	3,848	5.4
Canal+	1930-2030	4,841	1,072	4.5
France5	1700-1900	1,429	877	1.6
M6	2000-2200	7,746	2,679	2.9

Source: Médiamétrie Mediamat (Tarif 1/Secteur 1/Famille A)

**Average CPT 15+ (all commercial channels): €6.67**

FRANCE: TELEVISION

**Share of viewing & ad revenue**

Channel	Share of viewing (%)		Ad revenue
	4+	Adults 15+	2007 €(mill)
<b>Non-commercial</b>			
Arte	1.7	1.8	-
<b>Commercial</b>			
TF1	30.7	30.8	3,027
France 2	18.1	19.1	603
Others	17.5	16.2	-
France 3	14.1	14.4	381
M6	11.5	11.3	1,326
Canal +	3.4	3.5	111
France 5	3.0	2.8	58

Source: TNS Media Intelligence, Médiamétrie

**Top ten television programmes (2007)**

Programme	Channel	Adult 15+
		TVR
Rugby World Cup: England v. France	TF1	33.1
Rugby World Cup: New Zealand v. France	TF1	30.6
Rugby World Cup: France v. Ireland	TF1	27.7
Rugby World Cup: France v. Argentina	TF1	26.3
2007 Le Débat: Ségolène Royal/Nicolas Sarkozy	TF1	26.0
Rugby World Cup: France v. Argentina	TF1	24.6
Rugby World Cup: France v. Namibia	TF1	23.9
TF1 20 Heures: Déclaration du Président de la republique	TF1	23.0
Rugby World Cup: England v. South Africa	TF1	22.9
TF1 20 Heures: Déclaration du Président de la republique	TF1	22.6

Source: Médiamétrie

FRANCE: TELEVISION

**Top ten television advertisers (2007)**

Advertiser	TV expenditure €(mill)
Procter & Gamble	123.6
Ferrero	118.6
Unilever	109.8
Nestlé	96.2
Reckitt Benckiser	92.2
Danone	91.7
L'Oréal	89.7
Lascad	84.5
Lactalis Groupe	81.0
Universal Music	77.1

Source: TNS Media Intelligence

**Top ten television product categories (2007)**

Category	TV expenditure €(mill)
Food	1,212.7
Hygiene/beauty	764.5
Publishing	482.6
Auto/transport	452.2
Telecommunications	415.2
Insurance	398.3
Retail	291.5
Cleaning	246.0
Culture/leisure	176.8
Information media	150.9

Source: TNS Media Intelligence

**Top television owners (2007)**

Owner	TV revenue €(mill)
TF1	3,027
France 2	603
France 3	381
Canal +	111
France 5	58
M6	1,326

Source: TNS Media Intelligence

**Top television sales houses (2007)**

Sales house	TV revenue €(mill)
TF1	3,027
FTP	1,043
Canal+	111
M6	1,326

Source: TNS Media Intelligence

# NEWSPAPERS

## Newspapers

Title	Circulation (000s)	Adult readership (000s)	Full page B/W €	Adult CPT B/W €	Full page Colour €
Ouest France	772	2,308	-	-	-
Metro	733	1,908	-	-	93,000
20 Minutes	732	2,152	-	-	97,900
Le Parisien - Aujourd'hui	524	1,877	24,800	13	37,500
Direct Soir	517	612	-	-	-
Direct Matin Plus	436	533	-	-	-
Le Parisien	330	1,554	-	-	-
Le Figaro	328	936	29,000	31	53,500
L'Equipe	323	1,873	-	-	-
Le Monde	317	1,444	27,900	19	40,700
Sud-Ouest	311	1,040	-	-	-
LaVoix du Nord	285	1,046	-	-	-
Le Dauphiné Libéré	240	901	-	-	-
Le Progrès	217	792	-	-	-
La NRCO	210	622	-	-	-
Le Télégramme	202	555	-	-	-
La dépêche du Midi	194	692	-	-	-
La Montagne	191	614	-	-	-
L'Est Républicain	185	650	-	-	-
Les DNA	178	559	-	-	-
la Provence	147	605	-	-	-
Midi Libre	145	565	-	-	-
Le Républicain Lorrain	139	510	-	-	-
Libération	132	580	13,600	23	25,700
Les Echos	119	503	19,100	38	38,300
Nice Matin	113	354	-	-	-
L'Union - L'Ardennais	109	400	-	-	-
Le Courrier de l'Ouest	100	281	-	-	-
L'Alsace	98	322	-	-	-
La Croix	97	329	12,400	38	18,500
La Tribune	78	312	13,700	44	21,800
Var Matin	74	252	-	-	-
le Courrier Picard	65	297	-	-	-
L'Indépendant	63	245	-	-	-
Le Journal de Saône et Loire	60	200	-	-	-
La République du Centre	51	210	-	-	-
L'Humanité	51	306	7,810	26	13,390
Bien Public	47	164	-	-	-
Presse Océan - L'Eclair	45	191	-	-	-
Le Populaire du Centre	43	141	-	-	-
Corse Matin	42	127	-	-	-
la Charente Libre	38	129	-	-	-



## FRANCE: NEWSPAPERS

### *Newspapers (contd)*

Title	Circulation (000s)	Adult readership (000s)	Full page B/W €	Adult CPT B/W €	Full page Colour €
L'Yvonne Républicaine	37	130	-	-	-
Le Journal du Centre	29	101	-	-	-
Le Berry Républicain	29	85	-	-	-
L'Est Eclair	27	115	-	-	-
La Liberté de L'Est	26	85	-	-	-
le Journal de la Haute Marne	26	83	-	-	-
France Soir	22	99	5,000	51	7,000

Source: OJD 2007-2008 (circulation)/EPIQ 2007-2008 (audience)

Note: Rate cards 2008 - Base News page except for 20 minutes, Direct Matin Plus, Direct Soir, Metro

**Average CPT (B/W): €24.0**

### **Top ten newspaper advertisers (2007)**

Advertiser	Newspaper expenditure €(mill)
Renault	50.2
Citroen	48.9
Peugeot	46.8
Lidl	44.5
Edit.Le Monde	44.5
Socpresse	40.2
E.Leclerc	39.9
Orange France	38.5
GDF Suez	35.4
SFR	32.2

Source: TNS Media Intelligence

### **Top ten newspaper product categories (2007)**

Category	Newspaper expenditure €(mill)
Retail	454.0
Auto/transport	411.5
Information media	392.6
Culture/leisure	290.3
Services	220.8
Property	206.8
Insurance	171.8
Travel/tourism	155.3
Telecommunications	134.5
Financial	116.7

Source: TNS Media Intelligence

## FRANCE: NEWSPAPERS

### Top ten newspaper owners (2007)

Owner	Newspaper revenue €(mill)
Figaro	360.7
Le Monde	243.9
Parisien	243.7
20 Minutes	231.8
Metro	217.1
Echos	150.9
Equipe	140.3
Provence Ted	114.9
Ouest France Ted	103.3
Tribune	92.5

*Source: TNS Media Intelligence*

### Top ten newspaper sales houses (2007)

Sales house	Newspaper revenue €(mill)
Quotidiens Associés	520.4
Com Quotidien	459.4
Manchette Regie	361.6
Publiprint Socprint	360.7
Le Monde Publicité	243.9
20 Minutes	231.8
Metro France	217.1
Echofi	150.9
Bollore/Reseau Ville Plus	104.6
Di Regie	92.5

*Source: TNS Media Intelligence*

# MAGAZINES

## Magazines

w=weekly f=fortnightly m=monthly bm=bimonthly	Circulation	Adult readership	Full page Colour	Adult CPT Colour	Full page B/W
Title	(000s)	(000s)	€	€	€
TV Magazine (w)	4,543	14,037	72,500	5.2	-
Version Fémina (w)	3,643	10,078	73,200	7.3	-
Télé Z (w)	1,748	6,451	32,700	5.1	-
TV Hebdo (w)	1,701	5,434	36,300	6.7	25,400
Télé 7 jours (w)	1,588	6,328	37,650	5.9	30,120
Télé Loisirs (w)	1,244	5,564	27,430	4.9	24,687
Dossier Familial (m)	1,218	2,111	25,000	11.8	-
Télé Star (w)	1,200	5,197	28,220	5.4	23,987
Télé 2 Semaines (f)	1,198	5,644	26,700	4.7	24,030
TV Grandes Chaines (f)	1,129	3,301	24,000	7.3	21,600
Femme Actuelle (w)	1,027	6,742	37,650	5.6	30,120
Pleine Vie (m)	913	3,188	28,000	8.8	25,200
Notre Temps Magazine (m)	907	3,740	33,000	8.8	29,700
Famille et Education (bm)	786	1,873	15,500	8.3	-
Paris Match (w)	656	4,823	35,000	7.3	28,000
Télé Poche (w)	645	3,233	15,800	4.9	13,430
Télérama (w)	639	2,580	31,300	12.1	-
Télécablé Satellite Hebdo (w)	630	2,692	15,500	5.8	-
Prima (m)	529	2,548	23,800	9.3	19,040
Bien Etre & Santé (m)	516	1,407	20,000	14.2	-
Le Nouvel Observateur (w)	510	2,814	29,800	10.6	-
Le Particulier (m)	493	1,909	31,000	16.2	-
Voici (w)	493	4,531	15,000	3.3	12,000
Closer (w)	469	4,015	14,800	3.7	-
Avantages (m)	465	1,995	27,500	13.8	22,000
Maxi (w)	463	2,670	17,300	6.5	13,840
L'Express (w)	452	2,350	27,800	11.8	22,240
Le Figaro Magazine (w)	448	1,954	34,000	17.4	-
France Dimanche (w)	447	1,929	11,400	5.9	-
Madame Figaro (w)	445	1,546	30,500	19.7	-
Le Chasseur Français (m)	440	2,316	19,700	8.5	-
Public (w)	433	2,971	12,800	4.3	-
Marie Claire (m)	424	3,255	34,000	10.4	27,200
Le Point (w)	419	1,993	23,800	11.9	-
Capital (m)	385	2,664	39,000	14.6	31,200
Modes & Travaux (m)	377	2,928	21,000	7.2	18,900
Télé Magazine (w)	373	1,071	7,650	7.1	6,120
Ici Paris (w)	365	2,137	9,300	4.4	-
Cosmopolitan (m)	362	1,753	24,500	14.0	19,600
L'Equipe Magazine (w)	355	4,205	17,700	4.2	-
Elle (w)	345	2,417	28,500	11.8	22,800
Glamour (m)	339	1,486	22,500	15.1	20,250
Psychologies (m)	336	2,787	29,000	10.4	24,650
Auto Plus (w)	322	2,655	19,700	7.4	-
Gala (w)	318	2,964	20,150	6.8	16,120
Top Santé (m)	314	3,560	20,500	5.8	18,450

## FRANCE: MAGAZINES

**Magazines (contd)**

<b>w=weekly f=fortnightly m=monthly bm=bimonthly</b>	<b>Circulation</b>	<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>	<b>Full page</b>
<b>Title</b>	<b>(000s)</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>	<b>B/W</b>
		<b>(000s)</b>	<b>€</b>	<b>€</b>	<b>€</b>
Nous Deux (w)	310	1,613	9,980	6.2	7,385
Entrevue (m)	309	3,614	21,600	6.0	17,280
Parents (m)	309	2,556	29,500	11.5	23,600
Détente Jardin (bm)	304	891	12,300	13.8	9,840
Sélection du Reader's Digest (m)	300	1,822	12,500	6.9	10,500
Géo (m)	299	4,914	27,800	5.7	22,240
Le Monde 2 (w)	285	1,098	21,000	19.1	-
Auto Moto (m)	284	3,175	18,800	5.9	-
Maison Créative (bm)	279	1,455	14,800	10.2	11,840
Science & Vie (m)	278	4,100	18,700	4.6	-
Marianne (w)	275	1,976	14,500	7.3	14,500
Pélerin Magazine (w)	271	1,071	9,750	9.1	8,775
Sciences et Avenir (m)	270	2,696	16,700	6.2	-
Marie Claire Idées (q)	263	2,713	21,600	8.0	17,280
Télé 7 Jeux (m)	260	3,188	11,250	3.5	9,000
Challenges (w)	259	687	19,400	28.2	-
Biba (m)	254	957	17,000	17.8	-
Mieux Vivre Votre Argent (m)	252	1,064	22,000	20.7	17,600
Infobébé - Infocrèche (m)	246	1,397	26,000	18.6	20,800
Art et Décoration (m)	243	5,632	22,000	3.9	-
Ca m'Intéresse (m)	227	3,398	15,300	4.5	12,240
Maxi Cuisine (bm)	227	2,015	11,000	5.5	-
Rustica l'Hebdo Jardin (h)	227	963	13,700	14.2	-
Santé Magazine (m)	224	3,925	17,900	4.6	14,320
VSD (w)	218	1,449	14,200	9.8	11,360
Point de Vue (w)	201	1,044	14,000	13.4	12,600
Maison & Travaux (bm)	199	4,120	16,300	4.0	-
Courrier International (w)	190	1,323	15,400	11.6	-
Marie France (m)	187	1,606	17,000	10.6	13,600
Vie Pratique Gourmand f)	183	833	9,600	11.5	8,640
Le Journal de la Maison (m)	183	1,438	14,000	9.7	11,200
Esprit Femme (m)	181	499	13,200	26.5	11,880
Elle Décoration (bm)	170	3,065	16,600	5.4	13,280
Enfant Magazine (m)	170	1,372	17,000	12.4	13,600
Jeune et Jolie (m)	166	901	15,100	16.8	12,080
Première (m)	166	1,449	15,800	10.9	12,640
Cuisine Actuelle (m)	165	3,587	-	-	-
France Football Mardi (seul) (tw)	164	1,711	9,600	5.6	6,960
Micro Hebdo (w)	161	962	11,100	11.5	-
L'Expansion (m)	161	806	20,500	25.4	-
Femme Actuelle Jeux (m)	154	1,816	7,000	3.9	5,600
La Vie (w)	154	785	9,200	11.7	7,360
Mon Jardin et ma Maison (m)	153	1,540	13,500	8.8	10,800
L'Ami des Jardins et de la Maison (m)	150	1,176	13,100	11.1	-
National Géographic France (m)	150	2,043	14,500	7.1	11,600
Elle À Table (bm)	147	1,292	13,000	10.1	10,400
Système D (m)	143	1,336	14,800	11.1	-
Girls ! (m)	142	835	12,500	15.0	10,000
L'Automobile Magazine (m)	142	2,830	13,650	4.8	-

## FRANCE: MAGAZINES

**Magazines (contd)**

<b>w=weekly f=fortnightly m=monthly bm=bimonthly</b>	<b>Circulation</b>	<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>	<b>Full page</b>
<b>Title</b>	<b>(000s)</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>	<b>B/W</b>
		<b>(000s)</b>	<b>€</b>	<b>€</b>	<b>€</b>
Maison Magazine (bm)	137	1,663	10,900	6.6	8,720
Campagne Décoration (bm)	135	841	10,400	12.4	7,800
Cuisine et Vins de France (bm)	133	1,650	10,500	6.4	-
Fhm (For Him Magazine) (m)	130	1,336	15,800	11.8	-
L'Ordinateur Individuel (m)	130	1,195	11,600	9.7	-
Marie Claire Maison (m)	130	2,771	14,900	5.4	11,920
Le Revenu Placements (m)	129	663	18,000	27.1	14,400
Infocrèche (m)	129	668	18,000	26.9	14,400
Famili (m)	127	1,252	15,000	12.0	12,000
Enjeux-Les Echos (m)	127	650	22,500	34.6	-
Le Monde Diplomatique (m)	123	1,513	20,000	13.2	14,000
Infobébés (m)	117	1,124	20,000	17.8	16,000
Management (m)	117	808	18,700	23.1	14,960
Maison Française (bm)	117	880	14,600	16.6	11,680
Onze-Mondial (m)	115	1,691	12,400	7.3	12,400
L'Auto-Journal (f)	114	1,696	10,650	6.3	-
Science & Vie Micro (m)	114	659	8,200	12.4	-
Vocable (f)	110	676	7,500	11.1	-
Micro Actuel (m)	103	704	8,600	12.2	-
One (bm)	103	698	8,200	11.7	-
Prima Maison (m)	103	1,215	9,500	7.8	7,600
Vogue (m)	99	1,363	19,400	14.2	-
Investir Magazine (w)	98	801	19,800	24.7	15,400
Alternatives Economiques (m)	98	1,141	9,100	8.0	-
Phosphore (m)	95	919	10,400	11.3	-
Fan 2 (bm)	95	1,466	10,400	7.1	9,360
Maisons Côté Sud (bm)*	94	1,516	14,200	9.4	10,650
L'Officiel des Spectacles (wm)	91	929	5,625	6.1	4,800
Séries Mag (bm)	90	816	7,100	8.7	-
Maison Bricolage et Décoration (bm)	90	2,593	10,900	4.2	-
Studio Magazine (m)	88	1,005	10,800	10.7	-
L'Entreprise (m)	85	952	18,900	19.9	-
Historia (m)	83	1,458	10,300	7.1	8,755
Votre Beauté (m)	82	708	16,000	22.6	12,800
Lire (m)	78	571	8,900	15.6	-
Pariscopes (w)	77	471	5,900	12.5	3,960
Détours en France (m)	77	413	8,800	21.3	8,800
Pour nos Jardins (m)	76	752	8,600	11.4	-
Maisons Côté Ouest (bm)	75	1,235	10,800	8.7	8,100
Guide Cuisine (m)	72	1,205	-	-	-
Jeux Vidéo Magazine (m)	70	1,339	7,000	5.2	-
Terre Sauvage (m)	69	1,305	8,700	6.7	-
Votre Maison Votre Jardin (bm)	69	1,605	11,300	7.0	11,300
Maximal (m)	65	771	14,500	18.8	-
Maman ! (m)	59	753	9,700	12.9	-
L'Argus de l'Automobile (w)	59	1,551	11,950	7.7	8,400
Sport Auto (m)	58	1,214	7,400	6.1	-
Addx (m)	56	974	5,400	5.5	-
Newlook (m)	55	627	10,000	15.9	-

## FRANCE: MAGAZINES

**Magazines (contd)**

<b>w=weekly f=fortnightly m=monthly bm=bimonthly</b>	<b>Circulation</b>	<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>	<b>Full page</b>
<b>Title</b>	<b>(000s)</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>	<b>B/W</b>
		<b>(000s)</b>	<b>€</b>	<b>€</b>	<b>€</b>
La Revue Nationale de la Chasse (m)	55	948	5,300	5.6	-
Voiles et Voiliers (m)	54	570	5,680	10.0	3,620
Prima Cuisine Gourmande (bm)	53	1,086	6,000	5.5	4,800
Neuf Mois Magazine (m)	47	958	9,700	10.1	-
Maisons côté Est (bm)	43	583	6,800	11.7	5,100
La Pêche et les Poissons (m)	41	1,214	5,200	4.3	-
Tennis Magazine (m)	38	520	5,900	11.3	4,900
Rock & Folk (m)	37	863	7,400	8.6	6,660
Ulysse (m)	37	532	8,900	16.7	-
PC Jeux (m)	37	1,302	4,700	3.6	-
Joystick (m)	34	769	4,700	6.1	-
GTI Mag (m)	33	1,034	4,200	4.1	-
Pyrénées Magazine (bm)	32	795	4,500	5.7	-
Photo (m)	24	752	7,800	10.4	-
Femme en Ville (m)	-	636	25,000	39.3	22,500
Sport (w)	-	1,150	37,000	32.2	-
Midi Olympique Magazine (m)	-	815	10,800	13.3	-
A Nous Paris (w)	-	501	22,700	45.3	-

Source: AEPM 07/08

**Average CPT (Colour): €8.4****Top ten magazine  
advertisers (2007)**

<b>Advertiser</b>	<b>Magazine expenditure €(mill)</b>
Mondadori	45.9
Hachette Filipacchi Media	39.9
Prisma Presse	36.5
Renault	31.4
Cofidis	26.2
L'Oréal	25.3
Beiersdorf	24.6
Lidl	24.3
Unilever	23.3
Carrefour	23.3

Source: TNS Media Intelligence

## FRANCE: MAGAZINES

### Top ten magazine product categories (2007)

Category	Magazine expenditure €(mill)
Information media	456.7
Clothing/accessories	366.5
Retail	359.9
Hygiene/beauty	311.6
Auto/transport	295.1
Insurance	239.6
Other advertising	157.4
Telecommunications	148.7
Culture/leisure	136.0
Food	117.4

Source: TNS Media Intelligence

### Top ten magazine sales houses (2007)

Sales house	Magazine revenue €(mill)
Lagardère	787.8
Publiprint Socprint	371.7
Prisma Presse	369.9
Mondadori	335.1
Express-Roularta	334.6
Marie Claire Groupe	163.6
Publicat	145.3
Regie Obs	143.8
Condé Nast	74.4
Manchette Regie	70.6

Source: TNS Media Intelligence

### Top ten magazine owners (2007)

Owner	Magazine revenue €(mill)
Express	203.9
TV Magazine	179.9
Elle	146.4
Nouvel Observateur	118.1
Telerama	98.8
Madame Figaro	95.4
Télé 7 Jours	84.6
Femme Actuelle	84.1
Figaro Magazine	79.1
TV Hebdo	76.9

Source: TNS Media Intelligence

# RADIO

## Number of commercial radio stations: 16

Source: Médiamétrie

## Average daily listening minutes per adult: 177

Source: Médiamétrie

## Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) (€)	Average 13+ audience (000s)	30 sec av 13+ CPT (€)
<b>National</b>					
Cherie FM	music	0900-1100	4,872	384	12.7
Europe 1	general	0700-0900	4,512	1,250	3.6
Virgin Radio (ex Europe 2)	music	0700-0900	4,605	355	13.0
Fun Radio	music	0700-0900	4,773	432	11.0
Les Indépendants	music	0900-1100	2,950	1,124	2.6
MFM	music	0900-1100	2,461	158	15.6
Nostalgie	music	0900-1100	2,540	792	3.2
NRJ	music	0700-0900	5,638	745	7.6
Radio Classique	music	0900-1100	4,011	169	23.7
RFM	music	0900-1100	4,163	425	9.8
Rire et Chansons	music	1000-1200	4,134	145	28.5
RMC	general	0900-1100	3,879	591	6.6
RTL	general	0700-0900	4,582	1,775	2.6
RTL2	music	0700-1200	5,873	309	19.0
Skyrock	music	0700-0900	7,572	366	20.7
Sud Radio & Wit FM	general	0700-0900	3,699	78	47.4

Source: Mediametrie 126 000, Radio Sept-Dec 2007

## Average CPT (all commercial stations): €7.91

## Top ten radio advertisers (2007)

Advertiser	Radio expenditure (€(mill))
E. Leclerc	96.6
Renault	79.1
Intermarché	77.5
Carrefour	71.1
SFR	68.9
Bouygues Telecom	60.3
Orange France	54.0
Auchan	52.9
Systeme U Groupe	50.8
Carglass	49.7

Source: TNS Media Intelligence



### Top ten radio product categories (2007)

Category	Radio expenditure €(mill)
Distribution	795.3
Telecommunications	395.3
Auto/transport	334.4
Financial/insurance	265.0
Information media	226.0
Culture/leisure	213.4
Publishing	153.3
Services	129.4
Soft drinks	91.1
Travel/tourism	85.0

Source: TNS Media Intelligence

### Top ten radio owners (2007)

Owner	Radio revenue €(mill)
RTL	500.4
NRJ National	426.2
Europe 1	310.3
RMC Info	253.8
Cherie FM	206.4
Nostalgie	190.5
Les Independants	185.1
RFM	171.9
Skyrock	131.5
Fun Radio	127.4

Source: TNS Media Intelligence

### Top radio sales houses (2007)

Sales house	Radio revenue €(mill)
NRJ Global	902.2
Lagardère Publicité	790.1
IP France	789.1
RMC Régie	320.9
Sky Régie	131.5
Radio France	106.3
DI Régie	42.9

Source: TNS Media Intelligence

# OUTDOOR

## Type, size and cost of sites

operator/type of display	Size of display	Number of sites	Cost per panel per week (€)
<b>Avenir</b>			
Agir Actif	8D&12 m <sup>2</sup>	3,080	443.4
Agir Conso	8D&12 m <sup>2</sup>	2,659	385.8
Empir	8D&12 m <sup>2</sup>	7,017	387.3
Grand Angle	8D&12 m <sup>2</sup>	665	1,094.0
Noveo 8	8D&12 m <sup>2</sup>	2,298	145.3
Paris Couronne	8D&12 m <sup>2</sup>	769	554.3
<b>Clear Channel</b>			
Best	8D&12 m <sup>2</sup>	2,330	532.5
Big Jim	8D&12 m <sup>2</sup>	4,777	427.3
Gold	8D&12 m <sup>2</sup>	670	687.4
James	8D&12 m <sup>2</sup>	2,930	497.6
<b>CBS Outdoor</b>			
12-Dec	8D&12 m <sup>2</sup>	2,740	476.8
Optimum	8D&12 m <sup>2</sup>	2,762	428.8
Premium	8D&12 m <sup>2</sup>	1,117	560.0
Shopcover	8D&12 m <sup>2</sup>	2,425	339.4
<b>JC Decaux</b>			
Major A	2 m <sup>2</sup>	14,643	62.7
Major B	2 m <sup>2</sup>	14,643	62.9
Concepto	2 m <sup>2</sup>	14,385	63.0
Selecto	2 m <sup>2</sup>	7,881	70.7
Selecto +100	2 m <sup>2</sup>	6,492	77.9
Noveo 2	2 m <sup>2</sup>	2,789	99.9
Distingo	2 m <sup>2</sup>	2,392	110.7
Diva	2 m <sup>2</sup>	2,085	109.8
Jeune Actif	2 m <sup>2</sup>	1,340	114.1
Jeune Actif 8	8 m <sup>2</sup>	1,729	168.5
Senior Major	8 m <sup>2</sup>	6,026	156.8
Senior Major Double Impact	8 m <sup>2</sup>	6,026	156.8
Senior Major Impact +	8 m <sup>2</sup>	514	99.5

Source: Contractors

### Top ten outdoor advertisers (2007)

Advertiser	Outdoor expenditure €(mill)
Orange	72.5
SFR	53.4
Carrefour	46.8
Renault	44.9
Kronenbourg	39.1
Leroy Merlin	29.8
Bouygues Telecom	29.5
Ricard	27.6
Peugeot	25.6
SNCF	24.2

Source: TNS Media Intelligence

### Top ten outdoor product categories (2007)

Category	Outdoor expenditure €(mill)
Distribution	466.9
Culture/leisure	381.5
Auto/transport	330.1
Telecommunications	228.4
Soft drinks	224.4
Travel/tourism	151.9
Groceries	143.5
Information media	118.3
Fashion	116.1
Finance/insurance	108.8

Source: TNS Media Intelligence

### Top outdoor contractors (2007)

Contractor	Outdoor revenue €(mill)
J C Decaux	933.9
Clear Channel	763.3
CBS Outdoor	532.2
Metrobus	302.0
Other	144.2

Source: TNS Media Intelligence

# CINEMA

## Number of cinema screens: 5,398

Source: CNC

## Average cost of a 60 sec. spot per screen per week: €77

Source: ZenithOptimedia records

## Number of screens used in typical national campaign: 2,630

Source: ZenithOptimedia records

## Trend in admissions

	Admissions (mill)
2002	184.4
2003	173.5
2004	194.8
2005	176.0
2006	189.0
2007	178.0

Source: ZenithOptimedia records

## Cinema audience profile

<b>Age</b>	<b>%</b>
15-24	29.9
25-34	14.0
35-49	23.7
50+	32.5
<b>Sex</b>	<b>%</b>
Male	48.7
Female	51.3
<b>Income/Class</b>	<b>%</b>
CSP+	33.8
CSP-	19.4

Source: Mediametrie 75000 Cinema Jan-Dec 2007

## Top ten films (2007)

Film	Gross takings Admissions (000s)
Ratatouille	7,770
Spiderman 3	6,330
Harry Potter & the Order of the Phoenix	6,225
Pirates Of The Caribbean : At World's End	5,762
Shrek 3	5,476
La Mome	5,243
Taxi 4	4,577
The Simpsons Movie	3,556
Ensemble, C'est Tout	2,309
Night At The Museum	2,276

Source: Ecran total, Film Français

### Top ten cinema advertisers (2007)

<b>Advertiser</b>	<b>Cinema expenditure €(000s)</b>
Renault	10,487
Société Générale	9,643
SFR	8,481
Twentieth Century Fox	7,550
Intel Corporation	7,362
Coca Cola	6,056
Converse Royer Sport	5,968
Gaumont Columbia Tri.Film	5,263
Sony BMG Music	5,246
Paramount Pictures	5,011

Source: TNS Media Intelligence

### Top ten cinema product categories (2007)

<b>Category</b>	<b>Cinema expenditure €(000s)</b>
Culture/leisure	51,507
Telecommunications	25,875
Auto/transport	19,582
Finance/insurance	17,043
Hygiene/beauty	16,689
Fashion	13,628
Transport/tourism	9,959
IT	9,388
Soft drinks	9,183
Publishing	8,734

Source: TNS Media Intelligence

# INTERNET

**Homes with internet connection: 12,744,000 (46.0%)**

Source: ZenithOptimedia records

**Adult (11+) internet users: 31,243,000**

Source: ZenithOptimedia records

**Adult (11+) internet users with home broadband: 24,745,000**

Source: ZenithOptimedia records

**Typical monthly cost of internet access: €20**

Source: ZenithOptimedia records

## Cost of display ads

Type	Typical cost per thousand (€)
banner	4
Skyscraper	6
300x250 unit	10
streaming video	14

Source: ZenithOptimedia estimates

## Top ten search keywords

Keyword	Typical cost per click (€)
Accès Internet	1.20
Assurance	1.09
Voyage	2.50
Voiture	0.81
Banque	0.80
Crédit	1.69
Crédit immobilier	1.91
Fleur	1.06
Telephone	0.90

Source: Yahoo search marketing - maximum bid on a selection of key words

## Internet user profile

<b>Age</b>	<b>%</b>
2-16	17.2
16-24	9.8
25-34	16.3
35-54	38.9
55-64	13.9
65+	4.0
<b>Sex</b>	<b>%</b>
Male	52.6
Female	47.5
<b>Income/class</b>	<b>%</b>
CSP+	39.2
CSP-	18.4

Source: Médiamétrie NetRatings (Dec 07)

**Top ten internet sites (2007)**

Site	Unique visitors per month (000s)
Google	22,377
MSN/Windows Live	17,941
Microsoft	16,370
Orange	15,064
Free	13,821
Yahoo!	12,043
PagesJaunes	11,258
eBay	10,743
TF1 Network	10,283
L'Internaute Magazine	9,648

Source: Médiamétrie NetRatings (Dec 07)

**Top ten search engines (2007)**

Search engine	Unique visitors per month (000s)
Google Search	21,719
Google Image Search	7,562
MSN/Windows Live Search	5,712
Voila Search	5,705
Yahoo! Search	3,851
Free Search	968
AOL Search	884
AltaVista	668
YouBetterSearch.com!	664
Ask.com	570

Source: Médiamétrie NetRatings (Dec 07)

**Top ten internet  
advertisers (2007)**

Advertiser	Internet expenditure €(000s)
Ebay	77,678
SFR	68,805
SNCF	68,752
France Telecom	58,139
Cetelem	56,371
Orange France	53,127
Switch Voyages	52,920
La Redoute	44,247
Bouygues Telecom	42,915
Cdiscount	40,702

Source: TNS Media Intelligence

**Top ten internet product  
categories (2007)**

Category	Internet expenditure €(mill)
Telecommunications	400.8
Finance/insurance	337.1
Travel/tourism	325.6
Distribution	285.8
Services	212.8
Auto/transport	205.7
Culture/leisure	182.2
Hygiene/beauty	146.8
IT	134.2
Various ads	121.3

Source: TNS Media Intelligence

**Top ten internet  
owners (2007)**

Owner	Internet revenue €(000s)
Orange	335,771
MSN	258,082
AOL	211,853
Yahoo	174,260
Skyrock	159,409
TF1	127,862
Allocine	93,401
Pages Jaunes	83,208
Aufeminin	79,501
Lycos	75,166

Source: TNS Media Intelligence

## MEDIA REACH

### % reach by medium (adults)

	Daily	Weekly	Monthly
Conventional television	78.9	95.1	98.0
Online video	-	-	23.6
Mobile television	-	0.9	1.6
Newspapers	12.0	17.0	33.0
Magazines	63.0	92.0	97.0
Radio	83.6	90.6	94.5
Cinema	-	-	19.8
Internet	-	54.4	57.7

Source: ZenithOptimedia records

## OVERALL

### Top ten overall advertisers (2007)

Advertiser	Media expenditure €(mill)
Renault	328.8
SFR	298.6
Orange	289.4
E. Leclerc	221.9
Peugeot	213.3
Carrefour	207.0
Unilever	204.6
Citroen	192.5
Bouygues Telecom	182.3
Ferrero	163.9

Source: TNS Media Intelligence

### Top ten media owners (2007)

Owner	Media revenue €(mill)
TF1	3,027.3
M6	1,326.3
France 2	603.2
RTL	500.4
NRJ National	426.2
Orange	335.8
France 3	321.7
Clear Channel	317.7
Europe 1	310.3
PQR 66	302.4

Source: TNS Media Intelligence

### Top ten overall product categories (2007)

Category	Media expenditure €(mill)
Distribution	2,767.3
Auto/transport	2,210.4
Telecommunications	2,028.4
Groceries	1,850.9
Finance/insurance	1,641.4
Culture/leisure	1,607.3
Hygiene/beauty	1,513.9
Information media	1,214.0
Publishing	1,089.5
Travel/tourism	1,040.8

Source: TNS Media Intelligence

### Top ten sales houses (2007)

Sales house	Media revenue €(mill)
TF1 Publicité	3,498.9
Lagardère Publicité	1,891.4
M6 Publicité	1,527.2
Francetelevisions Pub	1,234.8
NRJ Global	1,055.6
IP France	813.9
Clear Channel	763.3
Publiprint	728.4
Comquot	549.0
CBS Outdoor	532.2

Source: TNS Media Intelligence



# GERMANY

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$ = 0.73 € at 2007 rate								
<b>Gross Domestic Product (€billion)</b>								
at current prices	2,063	2,113	2,143	2,164	2,211	2,243	2,322	2,428
% change	2.5	2.5	1.4	1.0	2.2	1.5	3.5	4.6
at 2007 prices	2,324	2,335	2,336	2,334	2,346	2,334	2,374	2,428
% change	1.1	0.4	0.0	-0.1	0.5	-0.5	1.7	2.3
<b>Gross Domestic Product per capita (€000s)</b>								
at current prices	25.1	25.6	26.0	26.2	26.8	27.1	28.1	29.4
at 2007 prices	28.2	28.3	28.3	28.3	28.4	28.2	28.7	29.4
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	2,823	2,892	2,933	2,962	3,026	3,070	3,178	3,324
at 2007 prices	3,182	3,196	3,197	3,194	3,211	3,194	3,250	3,324
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	34.3	35.1	35.6	35.9	36.6	37.1	38.5	40.2
at 2007 prices	38.7	38.8	38.8	38.7	38.9	38.6	39.3	40.2
<b>Population</b>								
Millions	82.3	82.4	82.5	82.6	82.6	82.7	82.6	82.6
<b>Consumer Price Index</b>								
2007=100	88.7	90.5	91.7	92.7	94.2	96.1	97.8	100.0
% change	1.4	2.0	1.4	1.1	1.6	2.0	1.7	2.3
<b>Ad.spend as a % of GDP</b>								
	0.97	0.87	0.78	0.74	0.73	0.75	0.78	0.77
<b>Advertising Expenditure Growth (%)</b>								
at current prices	8.0	-7.6	-9.0	-4.9	1.3	4.6	6.5	4.4
at 2007 prices	6.5	-9.4	-10.2	-5.9	-0.3	2.6	4.7	2.0

Source: IFS, ZenithOptimedia

# ADVERTISING EXPENDITURE

## Advertising expenditure in €million at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	16,733	7,583	4,077	3,803	601	156	512	-
1998	17,555	7,972	4,194	4,042	605	166	563	14
1999	18,506	8,143	4,423	4,317	691	172	682	77
2000	19,991	8,694	4,782	4,709	732	175	746	153
2001	18,467	7,769	4,436	4,469	678	170	760	185
2002	16,806	7,003	4,151	3,956	595	161	713	227
2003	15,977	6,512	3,958	3,811	579	161	710	246
2004	16,184	6,668	3,900	3,860	618	147	720	271
2005	16,935	6,718	3,890	3,930	664	132	769	832
2006	18,034	6,826	4,010	4,114	680	117	787	1,500
2007	18,819	6,898	4,053	4,156	692	106	820	2,094

## Advertising expenditure in €million at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	19,421	8,802	4,731	4,414	698	181	595	-
1998	20,189	9,168	4,823	4,648	696	191	647	16
1999	21,152	9,308	5,056	4,935	790	197	779	88
2000	22,530	9,798	5,389	5,307	825	197	841	172
2001	20,404	8,584	4,901	4,938	749	188	840	204
2002	18,318	7,633	4,524	4,312	649	175	777	247
2003	17,231	7,023	4,269	4,110	624	174	766	265
2004	17,175	7,076	4,139	4,096	656	156	764	288
2005	17,619	6,989	4,047	4,089	691	137	800	866
2006	18,443	6,981	4,101	4,207	695	120	805	1,534
2007	18,819	6,898	4,053	4,156	692	106	820	2,094

Source: ZAW

- Notes:
1. Excludes agency commission of 15%
  2. Excludes production costs
  3. Includes classified advertising
  4. After discounts

### Main advertising restrictions

**Tobacco:** Restricted in outdoor, trade magazines and cinema.

**Alcohol:** Advertising in cinema is not allowed before 1800, and on TV not before 1700.

**Pharmaceutical:** Advertising for OTC products allowed on TV and radio only.

**Political:** Only allowed during Bundestag and European elections.

## GERMANY: POPULATION

# POPULATION

<b>Land area (km<sup>2</sup>)</b>	349,223
<b>Capital city</b>	Berlin
<b>Language</b>	German
<b>Currency</b>	Euro (€)

*Source: CIA Factbook 2008*

### Population by age

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
0-15	5,789	5,493	11,282
16-24	4,848	4,651	9,498
25-34	4,903	4,777	9,680
35-44	6,763	6,453	13,216
45-54	6,322	6,179	12,500
55-64	4,705	4,817	9,522
65+	6,945	9,574	16,519
<b>Total</b>	<b>40,274</b>	<b>41,944</b>	<b>82,218</b>

*Source: Federal Office of Statistics*

### Adult status

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
AB	3,560	1,593	5,153
C1	7,256	11,124	18,380
C2	5,699	607	6,306
D	2,500	1,855	4,355
E1	12,451	18,228	30,679
<b>Total</b>	<b>31,466</b>	<b>33,407</b>	<b>64,873</b>

*Source: MA 2008*

#### Definition of adult status:

AB = self-employed/higher managerial

C1 = supervisory/clerical

C2 = skilled working class

D = semi and unskilled working class/farmers

E = unemployed/inactive

# TELEVISION

**Number of television households: 34,990,000**

## Television homes with:

Colour	97.0%
VCR	57.5%
DVD	69.6%
PVR/DVR	8.1%
Multiset	36.0%
Teletext	67.6%
Cable (pass)	41.7%
Cable (connection) - total	52.3%
Digital cable (connection)	10.6%
Satellite dish (DTH) - total	51.8%
Digital satellite dish	7.2%
Digital terrestrial television (DTT)	9.8%
IPTV	10.3%

*Source: MA Radio 2008 II, GSDZ*

**TV licence cost (per month): €17.03**

*Source: GEZ*

**Average minutes viewed per day per adult: 223**

*Source: ARD Sales & Services*

**Average pay-TV subscription cost (per month):**

	Average subscription €
Cable (analogue)	9.90
Cable (digital)	16.90
IPTV	2.90-22.90

*Source: Kabel Deutschland, Medialogics*

## GERMANY: TELEVISION

### Main channels

Channel	Technical penetration (%)	Daily hours of transmission	Ad mins per week
<b>Non-commercial</b>			
3.SAT	98.0	24	-
Arte	96.3	24	-
Kika	94.6	15	-
<b>Commercial</b>			
ARD (public)*	99.4	24	120
ZDF (public)*	99.3	24	120
RTL	98.1	24	1,512
SuperRTL	96.4	24	1,512
Vox	97.8	24	1,512
SAT.1	96.7	24	1,512
ProSieben	96.4	24	1,512
Kabel eins	96.0	24	1,512
RTL II	97.8	24	1,512

Source: Media Perspektiven, ARD

\* Ads allowed Mon-Sat 1700-2000 for 20 mins max.

### Cost/audience

Channel	Peak time	Adults 14-49/time 03-03	
		ad reach mill	CPT €
ARD (public)	1700-2000	0.46	40.03
ZDF (public)	1700-2000	0.37	38.45
RTL	1900-2300	0.64	21.63
SuperRTL	1900-2300	0.12	15.78
Vox	1900-2300	0.30	16.41
SAT.1	1900-2300	0.45	20.69
ProSieben	1900-2300	0.45	21.28
Kabel eins	1900-2300	0.22	15.63
RTL II	1900-2300	0.22	12.52

Source: horizont.net

**Average CPT (all commercial channels): €22.49**

GERMANY: TELEVISION

**Share of viewing & ad revenue**

Channel	Share of viewing (%) 2007		Ad revenue 2007
	Individuals	Adults*	€(000s)
<b>Non-commercial</b>			
Regional programmes^	13.5	7.0	-
Kika	1.2	-	-
3.SAT	1.0	-	-
Arte	0.7	-	-
<b>Commercial</b>			
ARD (public)	13.4	7.3	244,075
ZDF (public)	12.9	6.7	167,698
RTL	12.4	16.0	2,259,795
SAT.1	9.6	10.6	1,589,754
ProSieben	6.5	11.7	1,542,513
Vox	5.7	7.9	648,673
RTL II	3.9	6.3	475,005
Kabel eins	3.6	5.6	540,754
SuperRTL	2.6	2.8	259,156

Source: IP Deutschland, horizont.net

^broadcast nationwide \*14-49 years

**Top ten television programmes (2007)**

Programme	Channel	All viewers (mill)
Handball World Championship	ARD	16.2
Boxing: Maske vs Hill 31.03.2007	RTL	16.1
Wetten, dass...? 20.01.2007	ZDF	13.5
Wetten, dass...? 03.03.2007	ZDF	13.3
Football: Euro 2008 qual. Germany vs Czech Rep.	ARD	13.2
Wetten, dass...? 10.11.2007	ZDF	13.1
Sportschau live 04.02.2007	ARD	12.9
Football: England vs Germany 22.08.2007	ARD	12.5
Boxing: Klitschko vs Brewster 07.07.2007	RTL	11.3
Wetten, dass...? 06.10.2007	ZDF	11.2

Source: AGF Homepage

GERMANY: TELEVISION

**Top ten television  
advertisers (2007)**

<b>Advertiser</b>	<b>TV expenditure €(mill)</b>
Procter & Gamble	307.6
Ferrero	267.2
Unilever	238.0
L'Oréal	195.4
Danone	162.6
Reckitt Benkiser	155.6
McDonald's	113.8
Media-Saturn Holding	108.8
Jamba	104.0
Mars	92.3

Source: SevenOne Media

**Top ten television  
product categories (2007)**

<b>Category</b>	<b>TV expenditure €(mill)</b>
Auto	630.0
Confectionery	551.8
Telecommunications	551.7
Pharmaceuticals	344.3
Telephone services	322.9
Dairy products	311.4
Hair care	303.9
Beer	253.9
TV advertising	245.1
Trade organisations	231.4

Source: IP Deutschland

**Top television  
sales houses (2007)**

<b>Sales house</b>	<b>TV revenue €(mill)</b>
SevenOne	3,673.0
IP Deutschland	3,167.6
El Cartel	475.0
ARD/ZDF	411.8

Source: IP Deutschland

# NEWSPAPERS

## Newspapers

Title	Circulation (000s)	Adult readership (000s)	Full page B/W €	Adult CPT B/W €	Full page Colour €
<b>Newsstand titles (weekdays)</b>					
Bild Deutschland	3,401	11,612	327,355	28.2	327,355
Express	220	616	15,867	25.8	24,691
B.Z.	186	477	11,248	23.6	16,116
tz	151	343	12,874	37.5	16,736
Abendzeitung	146	291	20,222	69.5	28,318
Berliner Kurier	134	352	6,368	18.1	9,319
Hamburger Morgenpost	115	240	5,785	24.1	9,562
Morgenpost für Sachsen	107	234	6,066	25.9	8,796
<b>Nationals (weekdays)</b>					
Süddeutsche Zeitung	456	1,190	56,905	47.8	56,905
Frankfurter Allgemeine Zeitung	371	844	36,462	43.2	53,670
Die Welt Gesamt	280	681	25,080	36.8	34,510
Frankfurter Rundschau	153	312	12,600	40.4	16,380
Handelsblatt	145	465	37,639	80.9	54,492
Financial Times Deutschland	101	298	36,860	123.7	36,860
die tageszeitung	56	270	7,661	28.4	10,773
<b>Sundays</b>					
Sonntag Aktuell	663	-	55,576	-	82,261
Welt am Sonntag	402	-	39,283	-	52,800
FAZ am Sonntag	334	-	31,680	-	45,620
Die Rheinpfalz am Sonntag	241	-	28,314	-	34,376
BZ am Sonntag	112	-	5,217	-	7,529
<b>Local and regional subs (weekdays)</b>					
ACN Anz.-Coop. Nordrhein ACN-Gesamtausgabe	1,352	3,649	130,816	35.8	192,371
ACN Anz.-Coop. Nordrhein ACN-Gesamt Abo-Zeitungen	1,132	3,203	111,162	34.7	162,336
WAZ Mediengruppe 850 Gesamtausgabe inkl. IKZ	876	2,339	112,599	48.1	152,017
ZGW Ztgsg. Westfalen 10 Gesamtausgabe	809	2,236	100,814	45.1	143,925
Hannov. Allg./Neue Presse 108 HAZ-Total	559	1,435	76,621	53.4	107,551
mkn media kombi nord Gesamtausgabe	544	1,508	69,083	45.8	99,305
zeitungs kombi hessen Gesamtausgabe (HNA+MHP)	524	1,568	62,995	40.2	91,427
STZ Anzeigengemeinschaft 41 Gesamtbelegung (mit NWZ)	483	1,186	63,118	53.2	94,693
Ztgsg. Bremen/Weser-Ems Gesamtausgabe	472	1,210	45,344	37.5	60,789
zrs Rheinland-Pfalz Saarland Gesamtausgabe	462	1,459	54,320	37.2	74,994
Ztgsgr. Münchner Merkur/tz Gesamtausgabe MM/tz	422	1,263	35,270	27.9	45,851
Rheinische Post Gesamtausgabe	390	1,164	39,070	33.6	58,605
Ztgsgr. Münchner Merkur/tz Großraumausgabe MM/tz	351	995	24,719	24.8	32,135
Zeitungsgruppe Köln GS Gesamtausgabe	345	1,063	26,858	25.3	38,287
Augsburger Allgemeine GA (inkl. Allgäuer Ztg)	341	971	29,079	29.9	44,050
Zeitungsgruppe Thüringen W10 Gesamtausgabe	334	915	47,242	51.6	64,734
Südwest Presse GA Gesamtausgabe	314	786	40,754	51.8	61,135
Freie Presse 600 GES Gesamtausgabe	305	749	44,226	59.0	61,916
Neue Osnabrücker Zeitung A-E Gesamt A-E	296	813	32,470	39.9	47,099
Mittelhessenpresse Gesamtausgabe	293	921	42,453	46.1	61,599
Nürnberger Nachrichten 01 Gesamtausgabe	292	812	17,343	21.4	23,424
Sächsische Zeitung 010 Gesamtausgabe	275	814	39,800	48.9	56,410
ZN Zeitungsregion Nordwest T Totalausgabe 444	272	670	25,906	38.7	34,726
Ztgsgr. Münchner Merkur/tz Gesamtausgabe MM (o.tz)	271	959	27,274	28.4	35,456
Hannov. Allg./Neue Presse 101 HAZ-Nielsen-Ball-Ausg	268	708	39,380	55.6	54,833
Ztgsgr. Neue Westfälische 501 Gesamtausgabe	256	706	35,024	49.6	50,791
Mannheimer Morgen/ZRN ZRN Ausgabe ZRN	252	760	35,672	46.9	49,941
Mitteldeutsche Zeitung GEN Gesamt Sachsen-Anh. Süd	251	796	34,954	43.9	50,693
Hamburger Abendblatt Gesamtausgabe	251	744	27,247	36.6	37,801



## GERMANY: NEWSPAPERS

**Newspapers (contd)**

Title	Circulation (000s)	Adult	Full page	Adult CPT	Full page
		readership (000s)	B/W €	B/W €	Colour €
Die Rheinpfalz GA inkl. Pirmasenser Ztg.	250	718	29,638	41.3	37,073
shp Schleswig-Hol. Presse Gesamtausgabe	249	624	43,897	70.3	63,650
Augsburger Allgemeine Nordausgabe (Augsb.Allg.)	233	660	19,950	30.2	30,228
HNA Gesamt (inkl. WLZ/FZ)	231	647	22,498	34.8	32,637
Rhein-Zeitung Gesamtausgabe	218	686	25,089	36.6	35,112
ZGM Ztgsgr. Münsterland 500 Gesamtausgabe	210	564	24,436	43.3	36,152
Volksstimme GESA Gesamtausgabe	209	566	31,601	55.8	45,837
Hannov. Allg./Neue Presse 100 HAZ/NP-Hannover	208	539	28,210	52.3	38,844
Ztgsgr.Münchner Merkur/tz Großraumausgabe MM (o.tz)	200	686	18,116	26.4	23,551
Weser Kurier/Brem. Nachr. BAB Bremer Anzeigenblock	200	546	22,422	41.1	30,274
Rhein Main Presse 001 Gesamtausgabe	198	547	25,440	46.5	35,623
Berliner Zeitung Berliner Zeitung plus	191	468	21,609	46.2	31,285
sh:z GESH Gesamtausgabe (Mo-Fr)	187	503	27,994	55.7	42,007
RheinMainMedia RMM Gesamt	184	422	20,265	48.0	26,364
Schwäbische Zeitung Gesamtausgabe	183	525	26,621	50.7	39,964
Westdeutsche Ztg. plus WZP WZplus Gesamt ohne Expr.	175	390	28,277	72.5	43,241
Passauer Neue Presse 19 Gesamtausgabe	171	476	20,561	43.2	27,188
Main-Post 5T Großausgabe Main-Post Total	170	450	28,696	63.8	40,317
Braunschweiger Zeitung GA Gesamtausgabe	166	456	21,037	46.1	29,441
Berliner Zeitung Berliner Zeitung	166	405	18,384	45.4	26,447
Ostsee-Zeitung Gesamtausgabe	154	360	19,599	54.4	28,409
Saarbrücker Zeitung 05 GA (m.Pfälzischer Merkur)	154	497	18,983	38.2	25,606
Märkische Allgemeine GEM Gesamtausgabe	153	455	20,482	45.0	28,668
ZRO Ztgsring Oberfranken Gesamtausgabe	152	421	20,371	48.4	29,330
Badische Zeitung 104 Gesamt (10-70)	151	420	15,155	36.1	20,411
DIE WELT Berlin Gesamt (WELT Berlin/Berl. Morgenp.)	150	386	20,987	54.4	30,537
Der Tagesspiegel Gesamt (m.Potsdamer Neuste Nachr.)	149	278	17,857	64.2	24,879
Berliner Morgenpost Gesamtausgabe	147	351	19,462	55.4	28,290
Westfälischer Anzeiger 4100 Gesamtausgabe	141	331	24,481	74.0	34,274
Aachener Zeitung/Nachr. Gesamtausgabe	141	381	17,842	46.8	26,309
Südkurier G Gesamt inkl. Alb-Bote	138	370	23,773	64.3	30,914
Schwarzwälder Bote Gesamtausgabe	134	366	18,912	51.7	25,520
Straubinger Tb/Landsh.Ztg 101/141 Gesamt	129	335	11,908	35.5	16,873
Mittelbayerische Zeitung 19990 Gesamtausgabe	126	372	12,926	34.7	17,441
ZN Nordwest-Zeitung A Gesamtausgabe 700	125	278	9,979	35.9	13,356
Kieler Nachrichten Gesamtausgabe Kiel	109	319	14,991	47.0	21,748
Allgäuer Zeitung Gesamtausgabe Allgäu	108	312	12,960	41.5	19,631
Lübecker Nachrichten LN Gesamtausgabe	106	290	12,832	44.2	19,248
Schweriner Volkszeitung GES Gesamtausgabe	101	259	17,333	66.9	22,536
ASN - Anzeigenring ASN ASN Total	100	267	17,312	64.8	22,549
Lausitzer Rundschau 000 Gesamtausgabe	100	308	19,900	64.6	25,870
Heilbronner Stimme Gesamtausgabe	96	242	12,154	50.2	17,009
Trierischer Volksfreund 1 Gesamtausgabe	95	277	11,014	39.8	15,380
Nordkurier Gesamtausgabe	94	253	16,056	63.5	22,472
Darmstädter Echo Gesamtausgabe	93	321	14,628	45.6	20,472
Märkische Oderzeitung 001 Gesamtausgabe	92	291	16,523	56.8	23,962
Oberfranken Kombi Gesamtausgabe	92	289	16,868	58.4	23,931
Südthüringer Presse Plus Hauptausgabe	88	217	21,407	98.6	29,957
Donaukurier Gesamtausgabe	87	243	7,882	32.4	11,536
Der neue Tag 08 Gesamtausgabe	84	234	9,082	38.8	13,622
General-Anzeiger Bonn Gesamtausgabe	83	266	9,608	36.1	13,343
Fränkischer Tag G Gesamtausgabe	73	227	8,809	38.8	12,338
DIE WELT Gesamt Hamburg	72	201	9,504	47.3	12,925
Frankenpost 1010 Gesamt (inkl. Vogtland-Anzeiger)	66	205	12,385	60.4	17,352
Nordsee-Zeitung Gesamtausgabe	64	179	12,647	70.7	16,806

GERMANY: NEWSPAPERS

**Newspapers (contd)**

Title	Circulation (000s)	Adult readership (000s)	Full page	Adult CPT	Full page
			B/W €	B/W €	Colour €
Die Glocke 001 Gesamtausgabe	58	176	8,074	45.9	10,886
Siegener Zeitung Gesamtausgabe	58	151	5,744	38.0	8,983
Mittelbadische Presse Gesamtausgabe	55	146	10,307	70.6	13,914
Offenbach-Post 01 Gesamt	44	176	7,626	43.3	10,689
Eßlinger Zeitung 1 GA (m.Cannst./Untert.Ztg)	43	83	8,525	102.7	11,947
Reutlinger General-Anz. GEA Gesamtausgabe	42	104	6,639	63.8	8,555
Pforzheimer Zeitung PZ Gesamtausgabe	41	130	5,375	41.3	6,974
Leipziger Volkszeitung DNN Dresdner Neueste Nachr.	28	60	7,343	122.4	10,473
Neue Presse, Coburg Gesamtausgabe Coburg	27	83	6,380	76.9	9,295
Berliner Zeitung/Kurier Berlin Kompakt (Mo-Fr)	-	735	24,752	33.7	35,767

Source: MA Presse 2008 II, adults 14+

**Average CPT (B/W): €48.1**

**Top ten newspaper sales houses (2007)**

Sales house	Newspaper revenue Market Share (%)
Axel Springer	12.8
WAZ Mediengruppe	6.3
Frankfurter Allgemein Zeitung	3.1
Süddeutscher Verlag	2.6
DuMont Schaubert	2.5
Rheinische Post	2.3
Verlagsgruppe Handelsblatt	2.2
Sächsische Zeitung/Mopo	1.9
STZ Anzeigengemeinschaft	1.9
Leipziger Verlagsgesellschaft	1.9

Source: SevenOne Media

# MAGAZINES

## Magazines

w=weekly m=monthly f=fortnightly Title	Circulation (000s)	Adult readership (000s)	Full page Colour €	Adult CPT Colour €	Full page B/W €
<b>General interest</b>					
Bild am Sonntag (w)	1,796	11,191	71,930	6.4	62,078
Stern (w)	942	7,465	54,858	7.3	54,858
Der Spiegel (w)	940	6,034	55,418	9.2	55,418
Reader's Digest (m)	738	1,701	16,280	9.6	16,280
Focus (w)	732	5,706	47,594	8.3	47,594
Bunte (w)	626	4,016	32,000	8.0	32,000
Superillu (w)	448	3,234	21,800	6.7	21,800
Gala (w)	304	2,039	21,400	10.5	21,400
InTouch (w)	235	595	16,719	28.1	16,719
In - Das Star & Style Magazin (w)	171	494	12,000	24.3	12,000
<b>TV listings</b>					
rtv (w)	9,472	11,919	98,200	8.2	80,100
Prisma (w)	4,453	8,128	58,311	7.2	44,147
tv14 (f)	2,303	5,998	39,027	6.5	39,027
TV Digital (f)	1,858	2,362	48,600	20.6	48,600
TV Movie (f)	1,616	6,104	53,740	8.8	53,740
Hör Zu (w)	1,439	4,441	45,358	10.2	36,783
Auf einen Blick (w)	1,355	3,118	35,261	11.3	35,261
TVdirekt (f)	1,101	1,740	15,250	8.8	15,250
tv Hören und Sehen (w)	943	3,105	34,353	11.1	34,353
Funk Uhr (w)	676	1,748	25,875	14.8	17,325
TV Pur (m)	660	891	17,938	20.1	17,938
Fernsehwoche (w)	579	1,964	25,666	13.1	25,666
nurTV (m)	543	678	9,350	13.8	9,350
TV klar (w)	360	869	16,785	19.3	16,785
Super TV (w)	211	725	17,300	23.9	13,920
Bildwoche (w)	199	956	7,692	8.0	7,692
TVneu (w)	146	523	8,792	16.8	8,792
Die 2 (w)	102	337	4,300	12.8	2,960
<b>Women's weekly</b>					
Bild der Frau (w)	1,006	5,849	43,400	7.4	43,400
Freizeit Revue (w)	877	3,079	17,000	5.5	14,780
Neue Post (w)	614	2,362	15,040	6.4	15,040
Das Neue Blatt (w)	484	1,748	12,346	7.1	12,346
Freizeitwoche (w)	475	956	8,418	8.8	8,418
Tina (w)	467	2,970	28,941	9.7	28,941
Frau im Trend (w)	440	713	16,700	23.4	16,700
Freizeit Spass (w)	384	643	6,470	10.1	6,470
Lisa (w)	333	1,848	16,400	8.9	16,400
Die aktuelle (w)	325	1,874	9,600	5.1	7,090
Neue woche (w)	298	352	7,930	22.5	7,930
Frau im Spiegel (w)	270	1,744	12,200	7.0	9,200
Echo Der Frau (w)	254	1,057	5,710	5.4	3,170
Neue Welt (w)	253	783	8,247	10.5	4,582

## GERMANY: MAGAZINES

**Magazines (contd)**

<b>w=weekly m=monthly f=fortnightly</b>		<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>	<b>Full page</b>
<b>Title</b>	<b>Circulation</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>	<b>B/W</b>
	<b>(000s)</b>	<b>(000s)</b>	<b>€</b>	<b>€</b>	<b>€</b>
Frau Von Heute (w)	245	775	14,500	18.7	14,500
Alles für die Frau	243	833	14,070	16.9	14,070
Laura (w)	239	1,161	14,179	12.2	14,179
Frau aktuell (w)	231	1,305	5,890	4.5	3,270
Viel Spaß (w)	219	469	6,160	13.1	6,160
Das Goldene Blatt (w)	214	1,634	6,070	3.7	3,660
Schöne Woche (w)	197	368	2,464	6.7	2,464
Das neue (w)	179	494	4,898	9.9	4,898
Glücks-Revue (w)	175	1,038	5,300	5.1	4,600
Die Neue Frau (w)	162	391	4,544	11.6	4,544
Mach mal Pause (w)	152	960	4,898	5.1	4,898
Avanti (w)	151	393	3,061	7.8	3,061
Bella (w)	142	887	10,917	12.3	10,917
Lea (w)	139	566	6,532	11.5	6,532
Woche der Frau (w)	117	333	4,544	13.6	4,544
Mini (w)	113	478	3,673	7.7	3,673
Frau mit Herz (w)	87	663	4,651	7.0	4,651
7 Tage (w)	82	405	2,713	6.7	2,713
Heim und Welt (w)	71	329	2,713	8.2	2,713
<b>Women's fortnightly</b>					
Brigitte (f)	702	3,449	48,076	13.9	48,076
Freundin (f)	512	2,575	35,200	13.7	31,800
Für Sie (f)	449	2,374	27,500	11.6	27,500
GLAMOUR (f)	357	882	25,900	29.4	25,900
<b>Women's monthly</b>					
InStyle (m)	402	885	25,500	28.8	25,500
Joy (m)	339	766	23,800	31.1	23,800
Cosmopolitan (m)	306	1,129	29,500	26.1	29,500
Petra (m)	233	1,195	22,250	18.6	22,250
Brigitte Woman (m)	229	696	19,974	28.7	19,974
Jolie (m)	228	608	18,000	29.6	18,000
Vital (m)	217	968	14,900	15.4	14,900
Young (m)	198	599	15,500	25.9	15,500
Maxi (m)	197	452	18,000	39.8	18,000
Elle (m)	189	554	23,959	43.2	23,959
Shape (m)	188	248	16,500	66.5	16,500
Amica (m)	161	636	20,300	31.9	20,300
Healthy living (m)	153	304	13,900	45.7	13,900
Frau im Leben (m)	131	864	8,280	9.6	8,280
Vogue (m)	105	701	26,100	37.2	26,100
Burda Modemagazin (m)	93	819	13,500	16.5	9,000
Madame (m)	87	330	16,897	51.2	15,520
<b>Family</b>					
Eltern (m)	325	1,251	29,908	23.9	29,908
Familie&Co (m)	168	558	15,900	28.5	15,900
Eltern family (m)	154	540	14,100	26.1	14,100
Leben & erziehen (m)	128	308	7,850	25.5	7,850
Spielen und lernen (m)	109	450	9,700	21.6	9,700

GERMANY: MAGAZINES

**Magazines (contd)**

<b>w=weekly m=monthly f=fortnightly</b>		<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>	<b>Full page</b>
<b>Title</b>	<b>Circulation</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>	<b>B/W</b>
	<b>(000s)</b>	<b>(000s)</b>	<b>€</b>	<b>€</b>	<b>€</b>
<b>Youth/music</b>					
Bravo (w)	389	1,409	37,966	26.9	37,966
Popcorn (m)	156	555	13,108	23.6	13,108
Mädchen (f)	133	391	13,819	35.3	13,819
Bravo Girl! (f)	128	533	18,769	35.2	18,769
Top Of The Pops (m)	60	522	8,500	16.3	8,500
<b>Home/gardening</b>					
Mein schöner Garten (m)	374	2,351	21,601	9.2	21,601
Schöner Wohnen (m)	239	1,965	28,525	14.5	28,525
Wohnen & Garten (m)	222	649	12,500	19.3	12,500
Lisa Wohnen & Dekorieren (m)	191	397	10,500	26.4	10,500
Wohnidee (m)	173	731	21,652	29.6	21,652
Living at Home (m)	161	453	17,300	38.2	17,300
Zuhause Wohnen (m)	144	593	20,900	35.2	20,900
Lisa Blumen & Pflanzen (m)	132	709	7,500	10.6	7,500
Flora Garten (m)	127	603	11,400	18.9	11,400
Laura wohnen kreativ (m)	110	240	7,653	31.9	7,653
Gartenspaß (m)	72	401	7,300	18.2	7,300
<b>Do it yourself</b>					
Selbst ist der Mann (m)	108	851	17,589	20.7	17,589
Selber Machen (m)	105	988	16,900	17.1	16,900
<b>Food</b>					
	0				
Meine Familie & ich (m)	333	1,237	18,500	15.0	18,500
Kochen & genießen (m)	260	607	13,841	22.8	13,841
ARD Buffet (m)	199	459	9,500	20.7	9,500
Essen & Trinken (m)	162	1,214	20,458	16.9	20,458
Essen & Trinken für jeden Tag (m)	148	637	13,292	20.9	13,292
Rezepte pur (m)	137	253	7,926	31.3	7,926
Lisa Kochen & Backen (m)	115	951	11,900	12.5	11,900
Tina Koch- & Backideen (m)	111	735	9,887	13.5	9,887
Rezepte mit Pfiff (m)	23	412	5,369	13.0	5,369
<b>Health</b>					
Gesunde Medizin (m)	88	1,600	7,900	4.9	7,900
<b>Lifestyle/erotic/city</b>					
Fit For Fun (m)	246	1,426	25,100	17.6	25,100
Playboy (m)	229	1,086	24,000	22.1	24,000
Men's Health (m)	223	733	20,850	28.4	20,850
Prinz (m)	208	646	20,440	31.6	13,730
Neon (m)	198	738	18,800	25.5	18,800
FHM (m)	134	517	18,000	34.8	18,000
GQ (m)	114	344	18,500	53.8	18,500
Maxim (m)	111	284	18,900	66.5	18,900
Cinema (m)	110	706	14,100	20.0	14,100
Coupé	40	727	10,835	14.9	8,973
<b>Motoring</b>					
Ace Lenkrad (m)	544	987	18,600	18.8	12,900
Auto Bild (w)	525	2,814	37,000	13.1	37,000
Auto motor und sport (f)	423	1,955	36,085	18.5	36,085

GERMANY: **MAGAZINES**

**Magazines (contd)**

<b>w=weekly m=monthly f=fortnightly</b>		<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>	<b>Full page</b>
<b>Title</b>	<b>Circulation</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>	<b>B/W</b>
	<b>(000s)</b>	<b>(000s)</b>	<b>€</b>	<b>€</b>	<b>€</b>
Auto Tests (m)	205	393	13,900	35.4	13,900
Auto Zeitung (f)	187	732	20,578	28.1	20,578
Auto Straßenverkehr (f)	185	521	15,300	29.4	15,300
Motorrad (f)	130	706	16,300	23.1	16,300
Auto Bild Sportscars (m)	54	318	9,400	29.6	9,400
Auto Bild Allrad (m)	54	287	9,400	32.8	9,400
sport auto (m)	48	394	9,990	25.4	9,990
Auto Bild Motorsport (f)	47	757	9,400	12.4	9,400
<b>Sports</b>					
Sport Bild (w)	459	3,895	28,900	7.4	28,900
Kicker-sportmagazin (w)	224	2,580	21,792	8.4	21,792
Bravo Sport (f)	149	576	15,542	27.0	15,542
<b>Pets</b>					
Ein Herz für Tiere (m)	90	1,821	10,476	5.8	6,790
<b>Education/travel</b>					
GEO (m)	338	3,333	37,458	11.2	37,458
P.M. Magazin (m)	270	1,482	22,300	15.0	22,300
National Geographic Deutschland (m)	196	1,143	19,900	17.4	19,900
Welt der Wunder (m)	155	979	13,244	13.5	13,244
GEO Saison (m)	122	919	15,700	17.1	15,700
Bild der wissenschaft (m)	108	622	10,835	17.4	7,160
Merian (m)	82	670	14,200	21.2	14,200
<b>Computers/communications</b>					
Computer Bild (f)	672	4,209	24,300	5.8	24,300
Chip (m)	380	1,270	16,400	12.9	16,400
PC-Welt (m)	377	2,050	16,990	8.3	15,170
Computer Bild Spiele (m)	254	2,216	12,300	5.6	12,300
Audio Video Foto Bild (m)	191	666	12,500	18.8	12,500
PC Games (m)	123	830	11,800	14.2	--
Connect (m)	78	506	9,750	19.3	--
Tomorrow (m)	57	175	10,000	57.1	10,000
Chip-Foto-Video digital (m)	57	407	10,400	25.6	10,400
Bravo Screenfun (m)	19	431	6,894	16.0	6,894
<b>Environment</b>					
Öko-Test-Magazin (m)	162	1,687	10,500	6.2	6,700
<b>Business</b>					
Guter Rat (m)	221	1,316	14,300	10.9	14,300
Capital (m)	210	1,065	27,200	25.5	27,200
Wirtschaftswoche (w)	186	990	23,086	23.3	23,086
Euro (m)	175	425	16,300	38.4	16,300
Focus-Money (w)	154	707	14,950	21.1	14,950
Geldidee (m)	142	366	14,593	39.9	14,593
Manager magazin (m)	121	679	22,190	32.7	22,190
<b>Supplements</b>					
Süddeutsche Zeitung Magazin (w)	602	799	14,100	17.6	14,100

Source: MA Presse 2008 II, adults 14+

**Average CPT (Colour): €12.8**

## GERMANY: MAGAZINES

### Top ten magazine product categories (2007)

Category	Magazine expenditure €(mill)
Auto	294.1
Pharmaceuticals	232.5
Financial services	115.8
Catalogue	110.7
Clothing	107.6
Skin care	89.9
Telecommunications	82.2
Finance	75.0
Corporations	74.6
Insurance	69.7

*Source: SevenOne Media*

### Top magazine sales houses (2007)

Sales house	Magazine revenue €(mill)
Gruner & Jahr	733
Burda	637
Axel Springer	547
Bauer	352
Spiegel Verlag	216
Condé Nast	169
Motor Presse	167
Jahreszeiten	115
Verlagsgruppe Handelsblatt	90

*Source: G+J*

# RADIO

**Number of radio households: 37,098,000**

Source: MA 2008 Radio II

**Number of commercial radio stations: 344**

Source: MA 2008 Radio II

**Average daily listening minutes per adult: 176**

Source: MA 2008 Radio II (adults/0500-1200)

## Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) €	Peak adult audience (000s)	30 sec peak adult CPT €
<b>National</b>					
AS&S All Stars	general	0700-0800	28,428	11,445	2.5
RMS SUPER KOMBI	general	0700-0800	31,800	9,967	3.2
AS&S Kombi No.2	general	0700-0800	24,065	8,344	2.9
AS&S Kombi No.1	general	0800-0900	17,155	8,320	2.1
RMS SUPER KOMBI KOMPAKT	general	0700-0800	26,290	8,286	3.2
AS&S NACHRICHTEN KOMBI	general	0700-0800	24,570	7,673	3.2
AS&S Kombi Young & Fun	general	0700-0800	8,930	2,392	3.7
RMS YOUNG STARS	general	0700-0800	2,675	701	3.8
Klassik Radio	general	0800-0900	1,020	227	4.5
RTL RADIO	general	0600-0700	487	129	3.8
ENERGY CITY KOMBI	general	0700-0800	945	127	7.4
sunshine live	general	0800-0900	365	66	5.5
JAM FM	general	0800-0900	235	39	6.0
<b>Main regional</b>					
<b>Schleswig-Holstein</b>					
MACH 3 Kombi Schl-Holst/Hamburg	general	0800-0900	1,540	440	3.5
R.SH Radio Schleswig-Holstein	general	0800-0900	1,355	342	4.0
<b>Hamburg</b>					
Hamburg-Kombi	general	0700-0800	1,195	285	4.2
Radio Hamburg	general	0700-0800	1,090	234	4.7
106!8 rock'n pop	general	0900-1000	263	71	3.7
ENERGY Hamburg	general	0700-0800	180	26	6.9
<b>Niedersachsen</b>					
radio ffn	general	0700-0800	2,075	635	3.3
Hit-Radio Antenne	general	0700-0800	1,330	407	3.3
RADIO 21	general	0700-0800	301	77	3.9
<b>Bremen</b>					
Bremen Total	general	0700-0800	966	240	4.0
Bremen Eins	general	0700-0800	366	129	2.8
Bremen Vier	general	0700-0800	600	120	5.0
ENERGY Bremen	general	0700-0800	183	22	8.3
<b>Nordrhein-Westfalen</b>					
WDR Kompakt Kombi	general	0800-0900	7,565	2,733	2.8
WDR Euro Premium Kombi	general	0700-0800	6,165	2,082	3.0



## GERMANY: RADIO

**Costs/audiences (contd)**

<b>Station</b>	<b>Type</b>	<b>Peak time</b>	<b>Peak rate (30 sec) €</b>	<b>Peak adult audience (000s)</b>	<b>30 sec peak adult CPT €</b>
WDR Mega Kombi	general	0800-0900	4,930	2,061	2.4
radio NRW	general	0700-0800	5,435	1,719	3.2
WDR 4	general	0800-0900	3,050	1,218	2.5
1LIVE	general	0700-0800	3,735	1,068	3.5
WDR 2	general	0700-0800	2,335	1,039	2.2
Westfunk Kombi Ruhr plus	general	0800-0900	1,401	375	3.7
Lokalfunk Kombi Westfalen	general	0600-0700	1,680	374	4.5
FUNK-KOMBI WEST	general	0700-0800	1,950	342	5.7
Rheinland Kombi Köln	general	0700-0800	1,405	300	4.7
Westfunk Kombi Ruhr	general	0800-0900	1,193	295	4.0
FUNK KOMBI OWL plus	general	0600-0700	1,150	218	5.3
<b>Hessen</b>					
Hessenkombi hr1 + hr3 + hr4	general	0800-0900	2,163	998	2.2
Kombi hr3 + hr4	general	0800-0900	1,980	847	2.3
FFH Radio Kombi Hessen	general	0700-0800	3,013	832	3.6
HIT RADIO FFH	general	0700-0800	2,535	744	3.4
Kombi hr1 + hr4	general	0800-0900	1,093	637	1.7
Kombi hr1 + hr3	general	0700-0800	1,520	545	2.8
hr4	general	0800-0900	885	473	1.9
Kombi hr3 + YOU FM	general	0700-0800	1,785	456	3.9
hr3	general	0700-0800	1,420	405	3.5
Kombi hr1 + hr-info	general	0800-0900	363	207	1.8
hr1	general	0800-0900	293	177	1.7
planet radio	general	0700-0800	538	84	6.4
YOU FM	general	0700-0800	300	56	5.4
Hessen 14-49 Kombi	general	0700-0800	172	31	5.5
harmony.fm	general	0700-0800	253	25	10.1
<b>Saarland</b>					
WFS-Kombi	general	0700-0800	780	275	2.8
SR-Kombi	general	0700-0800	460	191	2.4
SR 1 Europawelle	general	0700-0800	260	103	2.5
Radio Salü	general	0700-0800	340	101	3.4
SR 3 Saarlandwelle	general	0700-0800	265	96	2.8
<b>Rheinland-Pfalz</b>					
Rheinland-Pfalz/Saarland-Kombi	general	0700-0800	2,205	618	3.6
SWR1/4 Kombi Rheinland-Pfalz	general	0800-0900	1,110	606	1.8
RPR Kombi (RPR1/bigFM)	general	0700-0800	2,020	555	3.6
SWR4 Rheinland-Pfalz	general	0800-0900	780	416	1.9
RPR 1.	general	0700-0800	1,380	394	3.5
SWR1 Rheinland-Pfalz	general	0800-0900	390	204	1.9
bigFM Hot Music Radio	general	0700-0800	760	179	4.2
ROCKLAND City-Kombi	general	0800-0900	340	68	5.0
ROCKLAND RADIO	general	0800-0900	268	51	5.2
Antenne West Kombi	general	0600-0700	396	23	17.2
<b>Baden-Württemberg</b>					
Radio-Kombi Baden-Württemberg	general	0700-0800	3,995	1,265	3.2
SWR1/4 Kombi Baden-Württemberg	general	0700-0800	1,980	1,084	1.8
Radio-Kombi B-W PREMIUM	general	0700-0800	3,070	937	3.3
SWR4 Baden-Württemberg	general	0800-0900	1,110	820	1.4

## GERMANY: RADIO

**Costs/audiences (contd)**

<b>Station</b>	<b>Type</b>	<b>Peak time</b>	<b>Peak rate (30 sec) €</b>	<b>Peak adult audience (000s)</b>	<b>30 sec peak adult CPT €</b>
SWR1 Baden-Württemberg	general	0700-0800	1,080	461	2.3
REGENBOGEN Kombi	general	0700-0800	1,820	419	4.3
Radio-Kombi B-W KOMPAKT	general	0700-0800	1,085	393	2.8
Hit-Radio ANTENNE 1	general	0700-0800	818	323	2.5
Radio Regenbogen	general	0700-0800	1,190	299	4.0
Radio 7	general	0700-0800	870	220	4.0
bigFM Der neue Beat	general	0700-0800	700	127	5.5
<b>Bayern</b>					
RADIO KOMBI BAYERN	general	0700-0800	7,608	2,185	3.5
Bavaria Kombi Bayern 1 + Bayern 3	general	0700-0800	4,210	1,645	2.6
ANTENNE BAYERN	general	0700-0800	4,765	1,327	3.6
BAYERN FUNKPAKET	general	0700-0800	2,860	1,005	2.8
Bayern 1	general	0700-0800	2,350	975	2.4
Bayern 3	general	0700-0800	2,045	715	2.9
SÜDBAYERN FUNKPAKET	general	0700-0800	1,500	564	2.7
TOP CITY FUNKPAKET	general	0600-0700	1,380	440	3.1
NORDBAYERN FUNKPAKET	general	0600-0700	1,560	335	4.7
HOT-FUNKPAKET	general	0600-0700	960	305	3.1
EASY-FUNKPAKET	general	0800-0900	840	195	4.3
B5 aktuell	general	0700-0800	560	126	4.4
Bayern 2	general	0700-0800	375	105	3.6
RADIO ARABELLA	general	0800-0900	300	93	3.2
RADIO GALAXY	general	0700-0800	185	76	2.4
Radio Gong 96,3 (München)	general	0600-0700	273	57	4.8
ROCK ANTENNE	general	0700-0800	230	50	4.6
ENERGY CITY KOMBI BAYERN	general	0700-0800	435	48	9.1
<b>Berlin/Brandenburg</b>					
AS&S Berlin/Brandenburg Kombi	general	0700-0800	3,285	1,029	3.2
AS&S Berlin 14-49 Kombi	general	0700-0800	2,530	618	4.1
RMS BERLIN KOMBI	general	0700-0800	1,805	596	3.0
AS&S Berlin 14-39 Kombi	general	0700-0800	2,225	517	4.3
HIT KOMBI BERLIN plus	general	0700-0800	1,540	406	3.8
Antenne Brandenburg	general	0800-0900	790	394	2.0
HIT KOMBI BERLIN	general	0700-0800	1,060	361	2.9
RMS BERLIN TOP KOMBI	general	0700-0800	1,275	346	3.7
rbb radiokombi	general	0700-0800	1,205	297	4.1
BB RADIO	general	0700-0800	628	258	2.4
104.6 RTL	general	0700-0800	658	205	3.2
CITY KOMBI BERLIN	general	0700-0800	510	182	2.8
Berliner Rundfunk 91!4	general	0800-0900	560	168	3.3
94,3 rs2	general	0700-0800	565	149	3.8
RadioBERLIN 88,8	general	0800-0900	445	134	3.3
Radioeins	general	0700-0800	485	129	3.8
Fritz	general	0700-0800	490	94	5.2
105'5 Spreeradio	general	0700-0800	315	87	3.6
Inforadio	general	0700-0800	535	83	6.4
ENERGY Berlin	general	0700-0800	480	53	9.1
KISS FM	general	0700-0800	335	43	7.8
STAR FM 87.9	general	0800-0900	185	39	4.7

## GERMANY: RADIO

**Costs/audiences (contd)**

Station	Type	Peak time	Peak rate (30 sec) €	Peak adult audience (000s)	30 sec peak adult CPT €
<b>Mecklenburg-Vorpommern</b>					
OSTSEEWELLE Meck-Vorp	general	0800-0900	610	173	3.5
Antenne Mecklenburg-Vorpommern	general	0600-0700	535	164	3.3
<b>Sachsen-Anhalt</b>					
RADIOKOMBI SACHSEN-ANHALT	general	0700-0800	1,188	329	3.6
Radio SAW	general	0700-0800	1,175	326	3.6
Sachsen-Anhalt Hit-Kombi	general	0700-0800	625	294	2.1
MDR 1 RADIO SACHSEN-ANHALT	general	0700-0800	473	266	1.8
Radio Brocken	general	0700-0800	365	172	2.1
89.0 RTL	general	0700-0800	365	128	2.9
<b>Sachsen</b>					
MDR 1 RADIO SACHSEN	general	0900-1000	970	517	1.9
radiokombi sachsen	general	0700-0800	1,830	442	4.1
Sachsen-Hit-Kombi SHK	general	0800-0900	730	305	2.4
RADIO PSR	general	0700-0800	1,140	268	4.3
SACHSEN-FUNKPAKET	general	0800-0900	335	187	1.8
R.SA	general	0600-0700	535	154	3.5
HITRADIO RTL SACHSEN	general	0600-0700	435	143	3.0
ENERGY Sachsen	general	0600-0700	335	68	4.9
<b>Thüringen</b>					
RADIOKOMBI Thüringen	general	0700-0800	765	273	2.8
MDR 1 RADIO THÜRINGEN	general	0700-0800	623	272	2.3
ANTENNE THÜRINGEN	general	0700-0800	685	250	2.7
LandesWelle Thüringen	general	0600-0700	285	84	3.4

Source: MA 2008 Radio II (D+EU, adults 10+)

**Average CPT (all commercial stations): €2.02**

Source: RMS

## Top ten radio advertisers (2007)

Advertiser	Radio expenditure €(000s)
Media-Saturn Holding	45,311
Opel	27,226
Praktiker Bau+Heimweker Märkte	24,858
McDonald's	22,271
Toto-Lotto	18,791
Carglass	17,819
Obi	14,334
Edeka	13,569
Plus	13,336
Ford	12,628

Source: RMS

## Top ten radio product categories (2007)

Category	Radio expenditure €(000s)
Auto	222,707
Trade organisations	173,839
Media	164,807
Furniture/furnishings	95,273
Services	88,026
Soft drinks	87,788
Tourism	85,686
Financial	74,021
Construction materials	67,171
Computers/telecommunications	59,593

Source: RMS

## Top radio sales houses (2007)

Sales house	Radio revenue €(000s)
Radio Marketing Services	853,627
ARD Sales & Services	448,018
Others	109,031

Source: RMS

# OUTDOOR

**Number of outdoor sites: 344,690**

## Type, size and cost of sites

Type/size of display	Number of sites	Cost per panel per month (€)
CLB	14,335	1,292.1
Superposter	1,064	1,098.0
Pillar/GS	16,511	474.6
Billboard/GS	168,202	340.8
CLP	101,000	304.2
Poster/AA	43,578	20.4

Source: *it works*

## Top ten outdoor product categories (2007)

Category	Outdoor expenditure €(000s)
Auto	71.1
Telecommunications	56.3
Beer	49.7
Trade organisations	45.8
Soft drinks	36.2
Clothing	33.1
Financial services	29.9
Insurance	20.7
Energy companies	20.1
Tourism	15.2

Source: *SevenOne Media*

## Top ten outdoor contractors (2008)

Owner	Market share %
Ströer Out-of-Home Media	36.6
awk Aussenwerbung	13.6
Plakatunion	8.1
Wall	6.7
Schwarz Aussenwerbung	6.5
JCDecaux	6.4
DERG (member of Ströer Group)	5.3
Degesta	4.9
Moplak	2.9
POS	1.5
<b>Top ten in total</b>	<b>92.5</b>
Others	7.5

Source: *it works*

# CINEMA

**Number of cinema screens: 4,824**

Source: FFA

**Average cost of a 60 sec. spot per screen  
per week: €118.36**

Source: Werbeweischer

**Average CPT (Adults 14+): €50**

**Number of screens used in typical  
national campaign: 1,428**

Source: Werbeweischer

## Trend in admissions

	Admissions (mill)	Gross takings €(mill)
2002	163.9	960.1
2003	149.0	850.0
2004	156.7	892.9
2005	127.3	745.0
2006	136.7	814.4

Source: Werbeweischer

## Cinema audience profile

<b>Age</b>	<b>%</b>
16-24	39.9
25-34	22.9
35-49	21.5
50+	9.1
<b>Sex</b>	<b>%</b>
Male	54
Female	46
<b>Household net income (€)</b>	<b>%</b>
less than 1,000	8
1,000 - 1,250	5
1,250 - 1,500	7
1,500 - 2,000	16
2,000 - 2,500	18
more than 2,500	46

Source: FFA

**Top ten films (2007)**

<b>Film</b>	<b>Gross takings €(000s)</b>
Harry Potter and the Order of the Phoenix	7,061
Pirates of the Caribbean: At World's End	6,075
Ratatouille	5,928
The Simpsons	4,552
Shrek 3	3,924
Mr. Bean's Holiday	3,413
Spider-Man 3	3,163
Live Free or Die Hard	2,625
Die Wilden Kerle 4	2,396
Lissi und der wilde Kaiser	2,274

Source: Weischer, Filmmonitor, Werbeweischer

**Top ten cinema  
advertisers (2007)**

<b>Advertiser</b>	<b>Cinema expenditure €(000s)</b>
Axel Springer	4,680
Zukunft Kino Marketing	4,047
Coca-Cola	2,531
Unilever	2,488
Media Saturn	2,052
Red Bull	2,048
T-Mobile	2,029
Nokia	2,015
Volksbanken & Raiffeisenbanken	1,831
Beiersdorf	1,782

Source: Werbeweischer

**Top ten cinema  
product categories (2007)**

<b>Category</b>	<b>Cinema expenditure €(000s)</b>
Soft drinks	6,795
Auto	5,718
Corporations	4,894
Newspaper advertising	4,463
Financial services	4,196
Marketing/advertising	4,106
TV advertising	3,724
Beer	3,567
Consumer magazine advertising	3,514
Telecommunications	3,484

Source: Werbeweischer

**Top ten cinema  
sales houses (2007)**

<b>Sales house</b>
Mathäser, München
Cinecitta, Nürnberg
Cinedom, Köln
CimaxX Potsdamer Platz, Berlin
Kinopolis, Frankfurt/Main
I-Max 3D, Sinzheim
I-Max Dome, Speyer
CineStar, Frankfurt/Main
Filmpalast, Karlsruhe
UCI Ruhr, Bochum

*Source: Werbeweisner*



# INTERNET

## Homes with internet connection: 68.2%

Source: MA Radio 2008 II

## Adult internet users: 41.32 million (58.2%)

Source: AGOF Internet facts 2007 IV

## Adult internet users with home broadband: 61.4%

Source: AGOF Internet facts 2007 IV

## Typical monthly cost of internet access: €20

## Average minutes spent online per day (adults with internet access): 71 (home)/14 (work)

Source: Nielsen Net View

### Cost of display ads

Type	Typical cost per thousand €
Flashlayer	65
Videostreaming	60
Wallpaper	35
Expanding formats	35
MPU 300x250	30
Skyscraper 160x600	20
Leaderboard 728x90	15

Source: Estimated value

### Top ten search keywords

Google 2007	Yahoo 2007
Routenplaner	Routenplaner
Telefonbuch	Wetter
Wetter	Immobilien
Wikipedia	Erotik
k.A.	YouTube
Bild	Telefonbuch
StudiVZ	Knuddels
ICQ	Wikipedia
Ikea	Chat
Örtliche	Dessous

Source: Google, Yahoo

### Internet user profile

Age	%
14-19	12.3
20-29	19.6
30-39	20.2
40-49	22.7
50-59	14.2
60+	11.0
Monthly household net income (€)	%
less than 1,000	15.0
1,000 - 2,000	29.6
2,000 - 3,000	26.4
3,000 and more	29.0

Source: AGOF Internet facts 2008 II

## GERMANY: INTERNET

### Top ten internet sites (2007)

Site	Unique visitors month (mill)
T-Online	15.1
WEB.DE	13.5
Yahoo! Deutschland	10.9
MSN.de	8.5
GMX	8.4
ProSieben.de	7.1
MyVideo	6.4
AOL	5.3
freenet.de	5.1
RTL.de	5.0

Source: AGOF Internet facts 2007 IV

### Top search engines (2007)

Search engine	Market are (%)
Google	95
Yahoo	5

Source: ZED Performance

### Top ten internet advertisers (2007)

Advertiser	Internet expenditure €(mill)
Plus	42
Planet 49	26
Friendscout24	25
Unister	24
T-Home	22
Procter & Gamble	20
Renault	20
McDonald's	16
Media Saturn	15
MP New Media	15

Source: SevenOne Media

### Top ten internet product categories (2007)

Category	Internet expenditure €(mill)
Online services	284.6
Trade organisations	148.4
Computers/telecommunications	145.8
Finance	119.9
Auto	92.8
Media	80.1
Other media publishers	72.2
Tourism	57.3
Body care	41.8
Consumer electronics	17.4

Source: SevenOne Media

### Top ten internet sales houses (2007)

Sales house	monthly reach (%)
United Internet Media	48.9
SevenOne Interactive	45.6
InteractiveMedia CCSP	45.1
Tomorrow Focus	38.0
Yahoo! Deutschland	27.2
AdLINK Media	24.5
AOL Digital Marketing	23.9
Ad Pepper Media & Mediasquares	22.7
Lycos	22.2
freenet	21.8

Source: AGOF Internet facts 2007 IV

## MEDIA REACH

### % reach by medium (adults)

	Daily	Weekly	Monthly
Conventional television	86.5	93.2	94.0
Online video	-	-	16.6
Mobile television	-	-	3.7
Newspapers	72.7	83.1	85.4
Magazines	31.2	57.4	66.9
Radio	77.0	85.0	87.2
Outdoor	65.6	75.7	91.1
Cinema	0.2	5.5	19.5
Internet	33.2	60.0	64.2

Source: MA Radio 2008 II (D+EU, adults 10+), VA 2008, AWA 2008

## OVERALL

### Top ten overall advertisers (2007)

Advertiser	Media expenditure €(mill)
Media Saturn	500.3
Procter & Gamble	389.4
Albrecht	284.4
Unilever	281.9
Ferrero	273.9
Axel Springer	265.4
L'Oréal	246.5
Edeka Zentrale	244.6
Lidl	224.8
Volkswagen	207.7

Source: horizont.net

### Top ten overall product categories (2007)

Category	Media expenditure €(mill)
Trade organisations	1,903.4
Auto	1,548.4
Newspaper ads	1,263.7
Consumer mags ads	996.2
Telecommunications	856.6
Other media/publishers	625.2
Pharmaceuticals	622.3
Financial services	610.5
Confectionery	592.0
TV advertising	505.2

Source: horizont.net

### Top ten sales houses (2007)

Sales house	Media revenue €(mill)
Bertelsmann	18,758
ARD	6,079
ProSiebenSat.1	2,703
Axel Springer	2,578
Georg von Holtzbrinck	2,489
Hubert Burda Media	2,214
ZDF	1,993
Verlagsgruppe Bauer	1,790
WAZ Mediengruppe	1,741
Verlagsgruppe Weltbild	1,700

Source: mediadb.eu, Institute of Media & Communication Policy

# IRELAND

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$ = 0.73 € at 2007 rate								
<b>Gross Domestic Product (€billion)</b>								
at current prices	104.6	117.0	130.2	139.4	149.0	162.2	177.3	190.6
% change	15.5	11.8	11.3	7.1	6.8	8.9	9.3	7.5
at 2007 prices	135.6	144.6	153.7	159.1	166.3	176.8	185.9	190.6
% change	9.4	6.7	6.3	3.5	4.5	6.3	5.2	2.5
<b>Gross Domestic Product per capita (€000s)</b>								
at current prices	27.5	30.3	33.1	34.9	36.6	39.2	42.0	44.3
at 2007 prices	35.7	37.5	39.1	39.9	40.9	42.7	44.1	44.3
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	143.2	160.1	178.2	190.9	203.9	222.0	242.7	260.9
at 2007 prices	185.6	197.9	210.4	217.8	227.6	241.9	254.4	260.9
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	37.7	41.5	45.3	47.8	50.1	53.6	57.5	60.7
at 2007 prices	48.8	51.3	53.5	54.6	55.9	58.4	60.3	60.7
<b>Population</b>								
Millions	3.8	3.9	3.9	4.0	4.1	4.1	4.2	4.3
<b>Consumer Price Index</b>								
2007=100	77.2	80.9	84.7	87.6	89.6	91.7	95.4	100.0
% change	5.6	4.9	4.7	3.5	2.2	2.4	4.0	4.0
<b>Ad.spend as a % of GDP</b>								
	0.74	0.75	0.79	0.83	0.94	0.90	0.95	0.97
<b>Advertising Expenditure Growth (%)</b>								
at current prices	36.6	12.5	18.3	12.2	20.1	5.2	14.9	10.0
at 2007 prices	29.4	7.3	13.0	8.4	17.5	2.7	10.6	4.9

Source: IFS, ZenithOptimedia

# ADVERTISING EXPENDITURE

## Advertising expenditure in €(mill) at current prices

(mill)	Total	News- papers	Maga- zines	TV	Radio	Cinema	Outdoor	Internet
1997	452	235	17	130	37	4	30	-
1998	501	247	17	149	44	5	39	-
1999	569	274	20	173	49	5	48	-
2000	778	431	15	200	55	6	70	2
2001	875	495	17	197	70	7	86	3
2002	1,035	628	24	207	65	9	98	4
2003	1,161	729	34	195	87	9	101	6
2004	1,394	895	32	251	91	10	106	9
2005	1,466	903	40	287	106	9	117	4
2006	1,685	1,038	40	326	124	10	134	13
2007	1,853	1,082	41	374	140	11	183	22

## Advertising expenditure in €(mill) at constant 2007 prices

(mill)	Total	News- papers	Maga- zines	TV	Radio	Cinema	Outdoor	Internet
1997	644	335	24	184	52	5	43	-
1998	696	344	24	207	61	7	54	-
1999	779	375	27	237	67	7	66	-
2000	1,008	559	19	259	71	8	90	2
2001	1,082	612	21	244	87	9	106	4
2002	1,222	741	28	244	77	11	116	5
2003	1,325	832	39	223	99	10	115	7
2004	1,556	999	36	280	102	11	118	10
2005	1,598	984	44	313	116	10	128	4
2006	1,767	1,088	42	342	130	10	141	14
2007	1,853	1,082	41	374	140	11	183	22

Source: ASI, IAPI scope, BASE

- Notes:
1. Excludes production costs
  2. Includes agency commission of 15% to 2004/excludes from 2005
  - 3) Includes classified display advertising, but not lineage
  4. Before discounts
  5. TV includes satellite from 2006
  6. Newspaper data from 2003 includes UK titles in Ireland
  7. Radio data includes independent local radio from 2003
  8. Internet includes display only
  9. Internet figures are NetBehaviour estimates
  10. Measurement method changed in 2005, (can distort year-on-year comparison)

## IRELAND: ADVERTISING EXPENDITURE

### **Main advertising restrictions:**

**Tobacco:** Banned.

**Alcohol:** All advertising to be pre-vetted by Central Copy Clearance Ireland Ltd.

Restriction of placement & exposure of alcohol advertising in the 4 key media, including:

Broadcast advertising to run in programmes with 75%+ adult profile

No alcohol sponsorship of sports programming

Cinema does not accept advertising from alcoholic beverages with an alcohol content of ABV > 25%

No alcohol advertising placed within 100 metres of school entrances

No bus shelter wrap rounds for alcohol advertising

**Pharmaceutical:** Only over-the-counter medicines may be advertised.

Claims pertaining to products should be backed up by substantiation including results of practical trials.

Any scientific information should be presented in an accurate manner.

Adverts not include representations of individuals which give the impression of professional advice or recommendations unless such persons are suitably qualified.

The advertising of medical preparations and cosmetic products is governed by a number of other Advertising Standards Authority for Ireland codes and statutory regulations.

**Children's:** On TV, restricted to programmes where less than 50% of audience consists of children.

Advertisements for snack foods should not portray them as a substitute for meals.

**Political:** Permitted in the press and out-of-home.

## IRELAND: POPULATION

# POPULATION

<b>Land area (km<sup>2</sup>)</b>	68,890
<b>Capital city</b>	Dublin
<b>Language</b>	English, Gaelic
<b>Currency</b>	Euro (€)

Source: CIA Factbook 2008

### Population by age

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
0-15	443	421	864
16-24	288	295	583
25-34	400	391	791
35-44	329	321	650
45-54	273	270	543
55-64	214	213	427
65+	213	266	479
<b>Total</b>	<b>2,160</b>	<b>2,177</b>	<b>4,337</b>

Source: CSO 06/TGI 2008

### Adult status

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
AB	249	226	475
C1	449	529	978
C2	471	392	863
D	267	289	556
E	139	221	360
F	176	116	292
<b>Total</b>	<b>1,751</b>	<b>1,773</b>	<b>3,524</b>

Source: TGI 2008

#### Definition of adult status:

AB = upper/middle class

C1 = lower middle class

C2 = skilled manual workers

D = semi and unskilled manual workers

E = subsistence/inactive

F = farmers

# TELEVISION

**Number of households: 1,579,000**

**Number of television households: 1,540,000 (97.5%)**

**Television homes with:**

VCR	61%
DVD	80%
PVR/DVR	9%
Multiset	52%
Teletext	83%
Cable (pass)	20%
Cable (connection) - total	35%
Digital cable (connection)	15%
Satellite dish (DTH) - total	36%
Digital satellite dish	33%

*Source: Nielsen*

**TV licence cost (per year): €160**

**Average minutes viewed per day per adult: 199**

**Average pay-TV subscription cost (per month):**

	Average subscription €
Cable (digital)	20
DTH (digital)	21

*Source: Sky Ireland, upc Ireland*



## IRELAND: TELEVISION

### Main channels

Channel	Technical penetration (%)	Daily hours of transmission	Ad mins per week
<b>Commercial</b>			
RTÉ 1	99.2	24	965
RTÉ 2	99.0	24	728
TV3	97.8	24	1,400
TG4	97.4	24	1,022
MTV	70.9	24	1,512
Sky One	66.9	24	1,568
E4	65.2	24	1,512
Paramount Comedy	64.9	24	1,323
Living	64.4	24	1,250
Sky News	63.8	24	1,198
Channel 6	62.1	24	1,260
Nickelodeon	61.6	24	1,071
Sky Sports 1	57.7	24	861
Sky Sports 2	57.2	24	1,120
Setanta Ireland	55.9	24	1,120
Nick Jr	38.8	24	1,071

Source: Nielsen

### Cost/audience

Channel	Peak time	Peak rate 30 sec €	Peak adult audience (000s)	30 sec peak adult CPT €
RTÉ 1	1800-2330	5,171	383	13.5
RTÉ 2	1800-2330	-	161	-
TV3	1800-2330	1,339	153	8.8
Sky One	1800-2330	194	31	6.3
TG4	1800-2330	186	27	6.9
Living	1800-2330	85	17	5.0
Paramount Comedy	1800-2330	39	11	3.5
Sky News	1800-2330	63	10	6.3
Sky Sports 1	1800-2330	56	9	6.3
E4	1800-2330	45	9	5.0
MTV	1800-2330	32	9	3.5
Setanta Ireland	1800-2330	35	7	5.0
Channel 6	1800-2330	35	7	5.0
Nickelodeon	1800-2330	21	6	3.5
Sky Sports 2	1800-2330	31	5	6.3
Nick Jr	1800-2330	18	5	3.5

Source: Nielsen, RTÉ, Agency Records

**Average CPT (all commercial channels): €10.7**

IRELAND: TELEVISION

**Share of viewing & ad revenue**

Channel	Share of viewing (%) 2007		Ad revenue 2007
	Individuals	Adults	€(mill)
<b>Non-commercial</b>			
BBC1	7.9	8.1	-
BBC2	4.7	4.7	-
<b>Commercial</b>			
RTÉ 1	24.7	26.6	228.9
TV3	17.2	17.6	97.3
Paramount Comedy	17.2	17.6	2.4
RTÉ 2	16.6	15.4	-
TG4	3.9	4.0	9.7
Sky One	2.9	2.4	8.8
Sky News	1.8	1.9	5.3
Living	1.7	1.7	4.4
Sky Sports 1	1.6	1.6	2.8
E4	1.4	1.4	4.6
Nickelodeon	1.1	0.5	1.8
MTV	1.0	0.9	2.7
Channel 6	0.8	0.8	2.1
Setanta Ireland	0.7	0.8	1
Sky Sports 2	0.7	0.7	1.4
Nick Jr	0.3	0.2	0.5

Source: Nielsen, IAPI, ZenithOptimedia records

**Top ten television programmes (2007)**

Programme	Channel	Adult TVR
Six Nations Rugby	RTÉ 2	27.7
The Late Late Toy Show	RTÉ 1	27.3
Prime Time	RTÉ 1	26.7
Rose Of Tralee	RTÉ 1	23.0
RTÉ News: Nine O' Clock	RTÉ 1	21.1
Killinaskully	RTÉ 1	20.9
The Sunday Game Live (Football Final)	RTÉ 1	20.9
The Sunday Game Live (Hurling Final)	RTÉ 1	20.8
Eurovision Song Contest	RTÉ 1	20.4
Prime Time Investigates	RTÉ 1	20.3

Source: Nielsen

IRELAND: TELEVISION

**Top ten television advertisers (2007)**

Advertiser	TV expenditure €(mill)
Proctor & Gamble	15.1
Diageo	11.7
Reckitt Benckiser	10.2
Lever Fabergé	8.3
Kellogg's	7.5
Heineken Ireland	6.6
Masterfoods	6.0
Unilever Bestfoods	5.9
Glaxo Smithkline	5.7
Danone	5.1

Source: IAPI

**Top ten television product categories (2007)**

Category	TV expenditure €(mill)
Food	53.0
Health/hygiene	51.0
Retail	35.0
Telecommunications	30.0
Alcohol	27.0
Banks/finance	26.0
Household dry goods	21.0
Entertainment	17.0
Soft drinks	15.0
Leisure/sports equipment	15.0

Source: IAPI

**Top television owners (2007)**

Owner	TV revenue €(mill)
RTÉ	228.0
Doughty Hanson	97.0
Sky Media	18.0
TG4	9.7
Viacom	7.0
Channel 6	2.1
Setanta Sports	1.0

Source: Agency Records, IAPI

**Top television sales houses (2007)**

Sales house	TV revenue €(mill)
RTÉ	228.0
three sales	103.0
Sky Media	18.0
TG4	9.7
Viacom	7.0
Medialink	4.6
Setanta Sports	1.0

Source: Agency Records, Medialive, IAPI

# NEWSPAPERS

## Newspapers

<b>d=daily w=weekly N=National R=Regional</b>	<b>Circulation</b>	<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>	<b>Full page</b>
<b>Title</b>	<b>(000s)</b>	<b>readership</b>	<b>B/W</b>	<b>B/W</b>	<b>Colour</b>
		<b>(000s)</b>	<b>€</b>	<b>€</b>	<b>€</b>
Sunday World (w, N)	292	932	16,950	18	25,900
Sunday Independent (w, N)	283	972	33,125	34	40,945
Irish Independent (d, N)	159	508	28,570	56	35,880
Irish News Of The World (w, N)	154	566	11,865	21	16,380
Irish Mail On Sunday (w, N)	123	244	9,884	41	13,179
Irish Times (d, N)	118	319	25,900	81	32,390
Irish Daily Star (d, N)	109	460	17,690	38	20,330
The Sunday Times (w, N)	105	343	19,950	58	26,900
The Irish Sun (d, N)	103	289	9,240	32	12,285
Evening Herald (d, R)	79	317	10,225	32	12,125
Irish Mirror (d, N)	70	219	6,664	30	8,925
Sunday Tribune (w, N)	65	177	19,600	111	26,200
Irish Star Sunday (w, N)	61	178	10,549	59	12,275
Irish Daily Mail (d, N)	59	131	6,600	50	10,000
Sunday Business Post (w, N)	55	162	13,605	84	18,625
Irish Examiner (d, N)	54	238	16,750	70	20,100
Irish Sunday Mirror (w, N)	43	146	4,286	29	5,781
The People (w, N)	28	78	4,286	55	5,781

Source: JNRS, ABC

**Average CPT (B/W): €50**

## Top ten newspaper advertisers (2007)

<b>Advertiser</b>	<b>Newspaper expenditure €(mill)</b>
MCD Productions	17.6
Sherry Fitzgerald	14.1
Tesco	12.8
Hooke & MacDonald	11.7
Aiken Promotions	9.9
Savills Hamilton Osborne King	9.4
Dunnes Stores	9.4
Supervalu	8.8
Xtra-Vision	7.2
Dell	6.3

Source: IAPI

## IRELAND: NEWSPAPERS

### Top ten newspaper product categories (2007)

Category	Newspaper expenditure €(mill)
Classified	192
Retail	125
Construction/property	114
Telecommunications	58
Entertainment	53
Recruitment	47
Banking/finance	42
Automotive	40
Tourism/transport	33
Media	21

Source: IAPI

### Top newspaper owners (2007)

Owner	Newspaper revenue €(mill)
Independent News & Media	342.0
Thomas Crosbie Holdings	106.0
Irish Times Trust	104.0
News International	99.0
Trinity Mirror	26.0
Associated Newspapers	11.6

Source: Agency Records, IAPI

### Top newspaper sales houses (2007)

Sales house	Newspaper revenue €(mill)
Independent News & Media	342.0
Thomas Crosbie Holdings	106.0
Mediaforce	105.8
Irish Times Trust	104.0
News International	99.0
Trinity Mirror	26.0
Associated Newspapers	11.6

Source: Agency Records, IAPI, ZenithOptimedia estimates

# MAGAZINES

## Magazines

w=weekly f=fortnightly m=monthly bm=bimonthly	Circulation	Adult	Full page	Adult CPT	Full page
Title	(000s)	readership	Colour	Colour	B/W
	(000s)	(000s)	€	€	€
<b>Business</b>					
Business & Finance (f)	20	-	4,275	-	4,275
Business Plus (m)	11	-	3,240	-	3,240
Business Ireland (q)	3	-	3,245	-	3,245
<b>Music</b>					
Hot Press (f)	19	34	4,500	132	4,500
<b>Women's</b>					
VIP (m)	35	149	4,150	28	4,150
U (f)	34	119	3,520	30	3,520
Image (m)	27	73	3,600	49	3,600
Womans Way (w)	27	191	3,600	19	3,600
Irish Tatler (m)	26	35	2,783	80	2,783
Kiss (m)	21	-	3,100	-	3,100
Prudence (bm)	10	-	2,800	-	2,800
<b>Personal finance</b>					
You & Your Money (m)	22	-	4,410	-	4,410
<b>Farming</b>					
Irish Farmers Journal (w)	69	220	16,200	74	10,584
<b>General</b>					
The Phoenix (f)	18	-	4,300	-	4,300
<b>TV Listings</b>					
Sky Mag (m)	454	-	7,200	-	7,200
RTÉ Guide (w)	101	293	6,420	22	6,420
TV Now (w)	33	126	3,650	29	3,650

Source: ABC, Publishers Statement, JNRS 2007, JNRS 2007/2008

**Average CPT (Colour): €39**

## Top ten magazine advertisers (2007)

Advertiser	Magazine expenditure €(000)
SC Johnson	2,991
Proctor & Gamble	1,100
L'Oréal	689
Garnier	508
Irish Distillers	429
Masterfoods	376
RTE	375
Boots	364
Debenhams	331
Lancôme	297

Source: IAPI

### Top ten magazine product categories (2007)

Category	Magazine expenditure €(mill)
Health/hygiene	5.9
Retail	5.1
Food	2.9
Media	2.8
Entertainment	2.5
Alcohol	2.0
Automotive	2.0
Telecommunications	1.8
Commerce	1.7
Household/furniture	1.7

Source: IAPI

### Top ten magazine owners (2007)

Owner	Magazine revenue €(mill)
RTÉ	5.1
Harmonia	5.5
Image	4.9
Cara Magazine	1.7
VIP Magazine	1.5
The Dubliner	1.4
TV Now	1.3
Farmers Monthly	1.0
Social & Personal	1.0
Computerscope	0.9

Source: IAPI

### Top magazine sales houses (2007)

Sales house	Magazine revenue €(mill)
Irish Farmers Journal	27.5
Harmonia	5.5
RTÉ	5.1
Image	4.9
Hot Press	3.2

Source: IAPI

# RADIO

**Number of radio households: 1,529,000 (96.8%)**

Source: TGI Ireland 2008

**Number of commercial radio stations: 33**

Source: ZenithOptimedia records

**Average daily listening minutes per adult: 227**

Source: JNLR 2007/2008

## Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) €	Peak adult audience (000s)	30 sec peak adult CPT €
<b>National</b>					
RTÉ Radio 1	talk/music	0700-1900	795	785	1.0
RTÉ 2FM	music/talk	0700-1900	650	597	1.1
Today FM	music/talk	0700-1900	405	542	0.7
Newstalk	talk	0700-1900	234	203	1.2
RTÉ Lyric	classical music	0700-1900	200	116	1.7
<b>Main regional</b>					
FM104	music	0700-1900	195	182	1.1
Dublin's 98	music	0700-1900	178	148	1.2
Cork 96FM	music/talk	0630-1900	216	129	1.7
Spin 1038	music	1900-2400	95	120	0.8
Limerick Live 95	music	0630-1900	85	93	0.9
Q102	music	0700-1900	124	84	1.5
Galway Bay	music	0630-1900	76	75	1.0
RedFM	music	0700-1900	95	69	1.4

Source: JNLR 2007/2008

**Average CPT (all commercial stations): €1.09**



IRELAND: RADIO

**Top ten radio advertisers (2007)**

Advertiser	Radio expenditure €(mill)
Eircom	3.9
Tesco	2.1
AIB Bank	2.0
Meteor Mobile Communications	2.0
Right Price Tiles	1.8
AA Ireland	1.5
Permanent TSB	1.3
Pfizer	1.2
National Lottery	1.2
Bank Of Scotland (Ireland)	1.2

Source: IAPI

**Top ten radio product categories (2007)**

Category	Radio expenditure €(mill)
Retail	28.8
Banking/finance	22.6
Telecommunications	13.5
Motor trade	11.5
Media	8.8
Entertainment	6.5
Tourism/transport	6.4
Food	6.3
Health/hygiene	5.2
Construction/property	3.7

Source: IAPI

**Top radio owners (2007)**

Owner	Stations Owned
Communicorp	5
RTÉ	4
Thomas Crosbie Holdings	4
UTV	6

Source: ZenithOptimedia records

**Top radio sales houses (2007)**

Sales house	Radio revenue €(mill)
RTÉ	47.4
Independent Radio Sales	31.8
Broadcast Media Sales	18.4

Source: IAPI, ZenithOptimedia records/estimates

# OUTDOOR

**Number of outdoor sites: 14,257**

## Type, size and cost of sites

Type/size of display	Number of sites	Cost per panel per month (€)
48 Sheet (3,048 x 6,096mm)	2,808	1,572
Europanel (3,048 x 3,962 mm)	137	1,386
Adshel (1,800 x 1,200mm)	3,904	616
Adbox (1,800 x 1,200mm)	1,538	318
Shopping Centre 6 Sheets (1,800 x 1,200mm)	1,880	472
Commuter 6 Sheets (1,800 x 1,200mm)	638	516
Other 6 Sheets (1,800 x 1,200mm)	398	500
12 Sheets	91	410
4 Sheets	146	380
Luas Columns (1,260 x 1,165 mm top)	124	1,000
(1,840 x 1,165mm bottom)	-	-
Metropanel	140	2,500
Metropoles	252	850
T-Sides (658 mm x 6,108 main)	980	1,060
(1,801mm x 1166mm drop)	-	-
Super Sides (658mm x 6,108mm)	1,037	418
Super Rears (various)	184	1,157

Source: PML, Medialive

### Top ten outdoor advertisers (2007)

Advertiser	Outdoor expenditure €(mill)
Coca-Cola	5.9
Diageo	4.8
Vodafone	4.6
Heineken Ireland	4.1
Bulmers	3.8
Bank Of Ireland	3.6
Meteor Mobile Communications	3.2
Glaxo Smithkline	3.1
Kellogg's	3.0
O2	2.9

Source: IAPI

### Top ten outdoor product categories (2007)

Category	Outdoor expenditure €(mill)
Alcohol	27.3
Telecommunications	19.9
Soft drinks	18.2
Food	16.9
Entertainment	15.5
Media	12.1
Banking/finance	11.9
Retail	8.4
Health/hygiene	8.2
Tourism/transport	7.8

Source: IAPI

### Top outdoor contractors (2007)

Contractor	Market Shee tage
Clear Channel	38%
Titan	19%
CBS Outdoor	17%
Avenue	14%
JCDecaux	12%

Source: PML

# CINEMA

## Number of cinema screens: 430

Source: Carlton Screen and P&D

## Average cost of a 60 sec. spot per screen per week: €230

Source: Carlton Screen (Based on Core Audience Package)

## Average CPT: €55.14

## Number of screens used in typical national campaign: 178

Source: Carlton Screen (Based on Core Audience Package)

## Trend in admissions

	Admissions (mill)	Gross takings €(mill)
2002	17.3	84.5
2003	17.4	99.8
2004	17.3	101.2
2005	16.4	102.3
2006	17.8	114.8

Source: Carlton Screen/TNS MRBI/Nielsen

## Cinema audience profile

<b>Age</b>	<b>%</b>
16-24	20.7
25-34	26.5
35-49	28.2
50+	6.0
<b>Sex</b>	<b>%</b>
Male	47.0
Female	53.0
<b>Income/Class</b>	<b>%</b>
AB	16.1
C1	32.2
C2	24.3
D	13.9
E	7.2
F	6.3

Source: CSA/ROI Film Monitor 2006, TGI Ireland 2008

IRELAND: CINEMA

**Top ten films (2007)**

<b>Film</b>	<b>Gross takings €(mill)</b>
The Simpsons Movie	6.1
Shrek The Third	5.7
Harry Potter and the Order of the Phoenix	3.9
Spider-Man 3	3.5
Pirates of the Caribbean: At World's End	3.4
The Bourne Ultimatum	3.1
Transformers	3.0
Ratatouille	2.9
Die Hard 4.0	2.6
Knocked Up	2.3

Source: Carlton Screen

**Top ten cinema  
advertisers (2007)**

<b>Advertiser</b>	<b>Cinema expenditure €(000s)</b>
Diageo	1,312
Coca-Cola	780
Vodafone	599
Heineken Ireland	427
Red Bull	287
Kellogg's	273
RTE Radio Telefis Eireann	271
Toyota	267
Sky	245
Sony	232

Source: IAPI

**Top ten cinema  
owners (2007)**

<b>Owner</b>	<b>Cinema Numbers</b>
Independents	35
Ward Anderson	25
United Cinemas International	8
Movies @	3
Ster Century	1
Cineworld	1

Source: Carlton Screen, Agency Records, Medialive

**Top ten cinema  
product categories (2007)**

<b>Category</b>	<b>Cinema expenditure €(000s)</b>
Alcohol	2,086
Telecommunications	1,514
Soft drinks	1,229
Food	1,181
Motor trade	857
Banking/finance	573
Health/hygiene	523
Leisure/sports equipment	509
Media	483
Retail	348

Source: IAPI

**Top ten cinema  
sales houses (2007)**

<b>Sales house</b>	<b>Total No. Of Screens</b>
CSA	382
Media Republic Pearl & Dean)	48

Source: Carlton Screen

# INTERNET

**Adult internet users: 1,687,000 (48.6%)**

**Adult internet users with home broadband: 1,231,000 (35.4%)**

**Typical monthly cost of internet access: €14**

**Average minutes spent online per day (adults with internet access): 98 (home)/116 (work)**

## Cost of display ads

Type	Typical cost per thousand €
banner	7
skyscraper	9
mpu	10
pop-up	12
streaming video	15

Source: Net Behaviour

## Internet user profile

Age	%
16-24	25.1
25-34	27.7
35-54	35.5
55-64	7.1
65+	4.6
Sex	%
Male	50.0
Female	50.0
Income/Class	%
AB	23.0
C1	35.0
C2	21.0
DE	16.0
F	5.0

Source: JNIR 2007

## Top ten searched words

Keyword
Great Escapes
Cheap Flights
Car Insurance
Youtube
Facebook
Dublin Castle
Clay Aiken
2008 Summer Olympics
Dancing With The Stars
Bugatti Veyron

Source: Net Behaviour (Google Zeitgeist, Lycos, Yahoo August 2008)

## IRELAND: INTERNET

### Top ten internet sites (2007)

Site	Unique visitors per month (000s)
Yahoo.ie	560
Eircom.net	393
RTE.ie	167
Ticketmaster.ie	147
Irishjobs.ie	115
Golden Pages.ie	104
Entertainment.ie	90
Ireland.com	87
Myhome.ie	87
Loadzajobs.ie	72

Source: JNIR 2008 (Research Subscribing Domestic Websites Only)

### Top search engines (2007)

Search engine	Visitors per month (000s)
Google	1,315
Yahoo	759
MSN	607
Golden Pages	287
Ask	285

Source: JNIR 2008, Net Behaviour

### Top ten internet advertisers (2007)

Advertiser	Internet expenditure €(000)
Vodafone	1,151
MBNA International	778
O2	700
AIB Bank	691
Permanent TSB	585
Diageo	467
Sky	464
Eircom	460
Bank of Ireland	457
Eirborne Text Promotions	402

Source: IAPI

### Top ten internet product categories (2007)

Category	Internet expenditure €(000)
Banking/finance	5,070
Telecommunications	4,544
Tourism/transport	1,718
Media	1,301
Food	1,026
Alcohol	957
Motor trade	938
Computers/printers	764
Entertainment	760
Retail	616

Source: IAPI

### Top ten internet owners (2007)

Owner
Yahoo.ie
Eircom.net
RTE.ie
Ticketmaster.ie
Irishjobs.ie
Golden Pages.ie
Entertainment.ie
Ireland.com
Myhome.ie
Loadzajobs.ie

Source: JNIR

### Top internet sales houses (2007)

Sales house	Internet revenue
Sales Online	7
Generator	5
Ad2-one	2
e-type	1

Source: MediaLive

## MEDIA REACH

### % reach by medium (adults)

	Daily	Weekly	Monthly
Conventional television	97.5	-	-
Online video	5.0	-	-
Newspapers	86.2	-	-
Magazines	-	46.1	-
Radio	84.0	-	-
Outdoor	-	84.7	-
Cinema	-	1.9	18.4
Internet	32.4	51.3	56.2

Source: Nielson, JNRS, TGI Ireland 2008, JNLR

## OVERALL

### Top ten overall advertisers (2007)

Advertiser	Media expenditure €(mill)
Diageo	24.6
Proctor & Gamble	18.7
Tesco	18.0
Vodafone	16.9
Meteor Mobile Communications	14.6
Heineken Ireland	13.8
Kelloggs	13.7
Coca-Cola	13.6
Dunnes Stores	13.5
Bank Of Ireland	12.3

Source: IAPI (excl auctioneers, concerts & ringtones)

### Top ten overall product categories (2007)

Category	Media expenditure €(mill)
Classified	307.6
Retail	224.6
Banking/finance	113.7
Food	91.2
Telecommunications	88.2
Motor trade	85.7
Health/hygiene	85.3
Alcohol	69.3
Tourism/transport	64.0
Entertainment	61.8

Source: IAPI (excl auctioneers, concerts & ringtones)

### Top ten media owners (2007)

Owner	Media revenue €(mill)
RTE TV	228.8
Irish Independent	173.8
Irish Times	104.9
TV3	97.4
Irish Star	73.9
Sunday Independent	73.4
Evening Herald	72.1
Irish Sun	49.6
Irish Examiner	45.3
Sunday World	40.0

Source: IAPI

### Top ten sales houses (2007)

Sales house	Media revenue €(mill)
INM	342.4
RTE	281.4
Thomas Crosbie	106.3
Mediaforce	105.8
Irish Times	104.9
three sales	103.9
News International	99.6
IRS	31.8
Mirror Group	26.7
TodayFM	19.9

Source: IAPI, ZenithOptimedia estimates



# ITALY

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$ = 0.73 € at 2007 rate								
<b>Gross Domestic Product (€billion)</b>								
at current prices	1,191	1,249	1,295	1,335	1,392	1,428	1,480	1,535
% change	5.7	4.8	3.7	3.1	4.2	2.7	3.6	3.7
at 2007 prices	1,396	1,424	1,442	1,448	1,476	1,485	1,507	1,535
% change	3.1	2.0	1.3	0.5	1.9	0.6	1.5	1.9
<b>Gross Domestic Product per capita (€000s)</b>								
at current prices	20.6	21.6	22.3	22.9	23.8	24.4	25.2	26.1
at 2007 prices	24.2	24.6	24.8	24.9	25.2	25.3	25.6	26.1
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	1,630	1,709	1,773	1,828	1,905	1,955	2,026	2,102
at 2007 prices	1,911	1,948	1,973	1,982	2,020	2,033	2,063	2,102
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	28.3	29.5	30.5	31.4	32.6	33.3	34.5	35.7
at 2007 prices	33.1	33.7	34.0	34.0	34.5	34.7	35.1	35.7
<b>Population</b>								
Millions	57.7	57.9	58.1	58.3	58.5	58.7	58.8	58.9
<b>Consumer Price Index</b>								
2007=100	85.3	87.7	89.8	92.2	94.3	96.2	98.2	100.0
% change	2.5	2.8	2.4	2.6	2.3	2.0	2.1	1.8
<b>Ad.spend as a % of GDP</b>								
	0.68	0.63	0.58	0.59	0.60	0.60	0.59	0.58
<b>Advertising Expenditure Growth (%)</b>								
at current prices	14.9	-3.3	-3.3	3.7	7.1	2.4	1.1	3.1
at 2007 prices	12.0	-5.9	-5.6	1.0	4.7	0.4	-1.0	1.3

Source: IFS, ZenithOptimedia

## ADVERTISING EXPENDITURE

### Advertising expenditure in € million at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	5,663	1,231	845	3,067	267	25	227	-
1998	6,274	1,383	936	3,337	319	36	255	7
1999	7,027	1,580	1,029	3,680	382	42	284	29
2000	8,071	1,818	1,158	4,134	454	50	318	139
2001	7,805	1,707	1,189	4,004	413	57	328	107
2002	7,547	1,589	1,089	4,028	387	61	294	99
2003	7,826	1,581	1,100	4,224	440	70	306	105
2004	8,382	1,606	1,105	4,647	529	76	312	107
2005	8,583	1,622	1,132	4,772	534	70	315	138
2006	8,678	1,626	1,199	4,701	576	64	312	199
2007	8,949	1,680	1,229	4,757	622	59	318	284

### Advertising expenditure in € million at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	7,056	1,534	1,053	3,822	333	32	283	-
1998	7,665	1,690	1,144	4,078	390	44	311	8
1999	8,445	1,899	1,236	4,423	459	51	341	35
2000	9,459	2,131	1,357	4,845	532	59	373	162
2001	8,898	1,946	1,356	4,565	471	65	374	122
2002	8,400	1,769	1,212	4,483	431	68	327	111
2003	8,487	1,715	1,193	4,581	477	76	332	114
2004	8,890	1,703	1,172	4,929	561	81	331	113
2005	8,926	1,687	1,177	4,963	555	73	328	144
2006	8,836	1,656	1,221	4,787	586	65	318	203
2007	8,949	1,680	1,229	4,757	622	59	318	284

Source: Media Key/AC Nielsen

Notes:

1. After discounts

2. Includes agency commission

3. Excludes production costs

4. Includes some classified advertising

5. Magazines include newspaper supplements

6. Internet includes display/classified/search

#### Main advertising restrictions

**Tobacco:** Banned in broadcast media.

**Alcohol:** TV ads for alcohol stronger than 8% banned before 1900. Such drinks may not use TV sponsorship or direct response.

**Pharmaceutical:** Only over-the-counter drugs may advertise, and they must first be approved by the Ministry of Health; contraceptives may not be advertised before 2130.

**Children's:** No advertising is allowed during children's programmes and cartoons shorter than 30 minutes. Children must not appear in broadcast ads.

**Political:** Political programmes and information must guarantee the same exposure for all parties.

# POPULATION

Land area (km <sup>2</sup> )	294,020
Capital city	Rome
Language	Italian
Currency	Euro (€)

Source: CIA Factbook 2008

## Population by age

	Male (000s)	Female (000s)	Total (000s)
0-15	4,580	4,328	8,909
16-24	2,795	2,669	5,464
25-34	4,152	4,058	8,210
35-44	4,845	4,780	9,625
45-54	3,968	4,043	8,012
55-64	3,458	3,661	7,119
65+	4,921	6,872	11,793
Total	28,718	30,413	59,131

Source: ISTAT

## Adult status

	Male (000s)	Female (000s)	Total (000s)
AB	2,192	928	3,120
C1	6,036	5,069	11,104
C2	5,418	2,721	8,140
E	9,724	16,508	26,232
Total	23,370	25,226	48,596

Source: Sinottica 2008/1

### Definition of adult status:

AB = entrepreneurs/professionals/managers

C1 = clerks/teachers/traders/dealers

C2 = workers

E = housewives/students/retired/unemployed

# TELEVISION

**Number of households: 23,600,370**

**Number of television households: 23,355,548 (99.0%)**

## Television homes with:

Colour	98.2%
VCR	56.7%
DVD	56.8%
Teletext	90.4%
Cable (connection) - total	5.4%
Digital cable (connection)	5.4%
Satellite dish (DTH) - total	23.2%
Digital satellite dish	18.6%
Digital terrestrial television (DTT)	23.7%

Source: Auditel, Owners' Statements

**TV licence cost (per year): €104**

**Average minutes viewed per day per adult: 234**

**Average pay-TV subscription cost (per month):**

	Average subscription (€)
Cable (digital)	19.9
DTH (digital)	51.0
DTT	10.0
IPTV (events)	2.4

Source: Owners' Statements

## Main channels

Channel	Technical penetration (%)	Daily hours of transmission	Ad mins per week
Rai 1	100	24	764
Rai 2	99	24	595
Rai3	97	24	441
Canale 5	98	24	1,895
Italia 1	95	24	1,786
Rete 4	94	24	1,623
La 7	78	24	1,659
Sky Cinema 1	19	24	-
Sky Cinema 2	19	24	-
Sky Cinema 3	19	24	-
Sky Sport 1	19	24	-
Sky Calcio	19	24	-
Sky TG24	19	24	-
Sky TG24 Meteo	19	24	-
National Geographic	19	24	-
Disney Channel	19	24	-
Boing	23	24	-
Mediaset Premium	23	events	-
LA7 Calcio+	23	events	-

Source: MTVS

## ITALY: TELEVISION

### Cost/audience

Channel	Peak time	Peak rate 30 sec ratecard (€)	Peak adult audience (000s)	30 sec peak adult CPT (€)
Rai 1	2000 - 2030	115,000	7,491	15.4
Rai 2	1300 - 1330	23,795	3,091	7.7
Rai 3	2100 - 2130	35,107	2,738	12.8
Canale 5	2000 - 2030	66,031	6,460	10.2
Italia 1	2130 - 2200	23,230	2,728	8.5
Rete 4	2030 - 2100	8,251	2,169	3.8
La 7	2300 - 2330	18,183	589	30.9

Source: Auditel, March 07

**Average CPT (all commercial channels): €11.5**

### Share of viewing & ad revenue

Channel	Share of viewing (%) 2007		Ad revenue 2007
	Individuals	Adults	€(mill)
Rai 1	22%	23%	806
Rai 2	10%	11%	337
Rai 3	9%	9%	228
Canale 5	21%	21%	1851
Italia 1	11%	10%	841
Rete 4	9%	9%	339
La 7	3%	3%	124
All satellite	8%	8%	67
Other	7%	6%	-

Source: AC Nielsen net values, Auditel

### Top ten television programmes (2007)

Programme	Channel	Adult TVR
Champions League: Milan - Liverpool	Rai Uno	24%
F1 Grand Prix: Bahrain	Rai Uno	21%
European Qualif.: Italy - Scotland	Rai Uno	20%
57° Festival di Sanremo	Rai Uno	20%
Champions League: Milan - Man Utd.	Rai Uno	19%
Il quinto dell'Inferno	Rai Uno	19%
European Qualif.: Italy - France	Rai Uno	19%
European Qualif.: Ukraine - Italy	Rai Uno	19%
European Qualif.: Scotland - Italy	Rai Uno	18%
F1 Grand Prix: Brazil	Rai Uno	18%

Source: AGB/Auditel

## Top ten television advertisers (2007)

Advertiser	TV expenditure €(mill)
Ferrero	149.8
Unilever	138.6
Wind Telecommunications	136.3
Vodafone	108.6
Barilla Alimentare	100.5
Procter & Gamble	100.4
Telecom It.Mobile	83.4
L'Oréal Saipo	73.7
Telecom Italia	66.0
Reckitt Benckiser	66.0

Source: ZenithOptimedia records

## Top ten television product categories (2007)

Category	TV expenditure €(mill)
Clothing	928.5
Auto	569.3
Telecommunications	550.5
Beverages/alcohol	363.6
Housekeeping	271.0
Media/publishing	267.4
Toiletries	252.1
Personal care	212.2
Pharmaceutical	195.6
Finance/insurance	183.4

Source: ZenithOptimedia records

## Top television owners (2007)

Owner	TV revenue €(mill)
Publitalia	3,031.6
Sipra	1,371.0
Cairo Pubbl.	124.2
MTV	106.1
Manzoni	20.6

Source: ZenithOptimedia records

# NEWSPAPERS

## Newspapers

Title	Circulation (000s)	Adult readership (000s)	Full page B/W €	Adult CPT B/W €	Full page Colour €
<b>National dailies</b>					
Corriere della Sera	662	2,722	114,660	42	152,880
La Repubblica	622	2,991	126,000	42	151,200
La Gazzetta dello Sport Lunedì	474	3,582	56,700	16	81,900
La Gazzetta dello Sport	375	3,582	44,100	12	63,000
Il Sole 24 ORE	343	1,149	-	-	226,560
Corriere dello Sport - Stadio Lunedì	288	1,311	63,168	48	88,480
Corriere dello Sport - Stadio	242	1,311	40,320	31	56,448
Il Giornale	204	623	67,200	108	100,800
Tuttosport Lunedì	131	928	42,224	46	59,136
Tuttosport	119	928	27,328	29	38,192
Libero Quotidiano	130	506	80,280	159	120,360
L'Unità	53	303	49,516	163	74,368
Avvenire	104	255	54,528	214	81,664
Italia Oggi	89	172	25,500	148	35,700
<b>Regional dailies</b>					
La Stampa	314	1,384	-	-	228,660
Il Messaggero	216	1,289	129,248	100	193,872
Il Resto del Carlino	168	1,180	75,000	64	105,000
La Nazione	138	827	90,000	109	126,000
Il Secolo XIX	108	571	72,162	126	108,243
Il Gazzettino	92	681	81,536	120	122,304
Il Tirreno	83	563	36,720	65	51,408
Il Mattino	82	718	75,936	106	113,904
Il Giorno	68	305	42,000	138	58,800
Giornale di Sicilia	67	507	50,266	99	76,872
L'Unione Sarda	67	403	32,480	81	38,976
La Sicilia	64	446	50,264	113	76,838
La Nuova Sardegna	59	293	25,488	87	35,640
L'Eco di Bergamo	56	342	12,960	38	22,032
La Gazzetta del Mezzogiorno	55	624	55,560	89	83,400
Gazzetta del Sud	52	419	50,267	120	76,872
Messaggero Veneto	52	282	24,360	86	34,080
Giornale di Brescia	50	389	12,960	33	22,032
L'Arena	48	322	22,350	69	31,290
Il Tempo	48	161	57,120	355	85,320
La Provincia (Como-Lecco-Sondrio)	45	330	13,500	41	22,950
Gazzetta di Parma	43	247	13,440	54	22,848
Il Giornale di Vicenza	42	277	18,470	67	25,858
Il Piccolo	42	207	24,360	118	34,080
Alto Adige/Trentino	36	254	21,384	84	29,808
Gazzetta di Mantova	34	186	14,480	78	20,320
Il Mattino di Padova	31	217	13,410	62	18,860
Libertà	29	179	11,520	64	17,280
L'Adige	26	167	13,068	78	18,295
Corriere dell'Umbria (Perugia + Terni + Foligno-Spoleto)	25	393	47,285	120	71,405

ITALY: NEWSPAPERS

newspapers cont.

Title	Circulation (000s)	Adult readership (000s)	Full page B/W €	Adult CPT B/W €	Full page Colour €
Il Centro	24	253	14,256	56	19,872
La Provincia di Cremona	23	140	12,640	90	17,696
La Provincia Pavese	23	173	11,860	69	16,620
Nuovo Quotidiano di Puglia	20	277	17,604	64	26,406
Corriere Adriatico	19	343	21,276	62	31,914
La Tribuna di Treviso	19	151	8,260	55	11,570
Gazzetta di Reggio	14	133	7,190	54	10,110
Il Quotidiano della Calabria	13	190	9,180	48	13,770
La Nuova di Venezia e Mestre	13	81	5,150	64	7,190
Nuova Gazzetta di Modena	12	121	6,710	55	9,394
La Nuova Ferrara	11	100	6,710	67	9,430
<b>Free</b>					
E Polis Circuito	418	832	144,000	173	180,000
Leggo	-	2,262	148,560	66	148,560
City	-	1,886	60,000	32	75,000
Metro	-	1,839	-	-	163,523

Source: Audipress 2007\_2; ADS Jan-Dec 2007

**Average CPT (B/W): €60.1**



### Top ten newspaper advertisers (2007)

Newspaper expenditure	
Advertiser	€(mill)
Toyota	20.2
Fiat	17.4
Media Market	13.8
Vodafone	13.0
Telecom It.Mobile	12.2
Eni Roma	11.7
Peugeot	11.4
Poltrone E Sofa'	11.1
Volkswagen	10.7
Citizen It.	10.2

Source: AC Nielsen net values

### Top ten newspaper product categories (2007)

Newspaper expenditure	
Category	€(mill)
Auto	158.9
Finance/insurance	123.8
Distribution	100.5
Professional services	89.1
Clothing	84.9
Media/publishing	63.8
Tourism/travel	55.4
Telecommunications	54.2
Household	49.1
Public bodies	46.7

Source: AC Nielsen net values

### Top ten newspaper owners (2007)

Newspaper revenue	
Owner	€(mill)
Publikompass	199.8
RCS	164.2
Manzoni	148.2
Piemme	139.7
24 Ore System	135.1
SPE	80.3
Mondadori	30.2
Class	27.1
Sport Network	24.8
OPQ	9.9

Source: AC Nielsen net values

# MAGAZINES

## Magazines

w=weekly m=monthly		Adult	Full page	Adult CPT
Title	Circulation (000s)	readership (000s)	Colour €	Colour €
<b>Women's</b>				
Io Donna (w)	502	1,051	60,000	57
Donna Moderna (w)	498	2,487	65,650	26
D La Repubblica delle Donne (w)	406	910	55,000	60
Glamour (m)	289	910	38,000	42
Intimità (w)	273	781	22,000	28
Vanity Fair (w)	268	1,090	66,000	61
Grazia (w)	218	829	56,250	68
Cosmopolitan (m)	217	600	29,925	50
A (w)	209	642	35,700	56
Visto (w)	205	823	15,000	18
Ragazza Moderna (m)	201	507	28,000	55
Gioia (w)	197	447	45,000	101
Tu (w)	195	769	22,750	30
Grand Hotel (w)	191	603	5,400	9
Amica (m)	180	1,042	31,500	30
Elle (m)	174	431	42,000	97
Flair (m)	170	375	46,750	125
Marie Claire (m)	170	563	42,000	75
Confidenze (w)	160	696	20,000	29
Cioè (w)	130	549	26,000	47
Top Girl (m)	119	476	26,780	56
Vogue Italia (m)	109	516	50,000	97
Burda (m)	47	363	18,000	50
<b>Food</b>				
Cucina Moderna (m)	296	1,175	19,400	17
Cucinare Bene (m)	156	885	8,800	10
Sale & Pepe (m)	143	673	15,200	23
Cucina No Problem (m)	108	165	17,000	103
La Cucina Italiana (m)	102	712	24,000	34
Subito Pronto (m)	89	225	7,000	31
A Tavola (m)	26	117	14,400	123
<b>Family</b>				
Dipiù (w)	739	2,111	75,000	36
Famiglia Cristiana (w)	644	2,973	55,900	19
Oggi (w)	624	3,170	55,000	17
Messaggero di Sant'Antonio (m)	591	1,039	15,200	15
Gente (w)	411	2,684	48,000	18

ITALY: MAGAZINES

**Magazines (contd)**

<b>w=weekly m=monthly</b>		<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>
<b>Title</b>	<b>Circulation</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>
	<b>(000s)</b>	<b>(000s)</b>	<b>€</b>	<b>€</b>
<b>Baby</b>				
Io e il mio bambino (m)	226	776	38,000	49
Donna & Mamma (m)	125	433	25,500	59
Insieme (m)	106	247	25,500	103
Bimbisani & Belli (m)	89	705	8,500	12
<b>Teenager's</b>				
Topolino (w)	234	1,240	24,500	20
Ciak (m)	97	338	27,000	80
Il Giornalino (w)	55	146	10,350	71
<b>Fitness/Health</b>				
Silhouette Donna (m)	353	891	11,600	13
Starbene (m)	337	1,505	35,200	23
OK la Salute prima di tutto (m)	218	461	36,000	78
Viversani & Belli (w)	173	918	9,500	10
Psychologies Magazine Italia (m)	151	332	30,000	90
Come Stai (m)	43	203	5,700	28
Salute (w)	-	866	50,000	58
<b>Sport</b>				
Sport Week (w)	332	1,465	30,000	20
Guerin Sportivo (w)	45	202	10,608	53
<b>Gossip</b>				
DipiùTV (w)	577	2,296	65,000	28
Chi (w)	504	2,823	42,350	15
Diva e Donna (w)	240	548	70,000	128
Novella 2000 (w)	146	854	18,000	21
Eva Tremila (w)	85	314	14,000	45
<b>Auto</b>				
Al Volante (m)	544	2,233	49,613	22
Quattroruote (m)	426	4,129	30,000	7
AM Auto Mese (m)	293	378	25,500	67
In Sella (m)	201	1,358	23,940	18
Cambio Panoramauto (m)	118	252	31,000	123
Gente Motori (m)	117	1,171	25,000	21
Auto (m)	90	893	23,715	27
Motosprint (w)	64	531	10,244	19
Autosprint (w)	56	533	13,770	26
Auto Oggi (w)	51	568	16,500	29
<b>Business</b>				
Capital (m)	89	254	30,000	118
Class (m)	81	120	40,000	333
Il Mondo (w)	78	108	20,000	185
Panorama Economy (w)	76	128	29,700	232
Affari & Finanza/Audipress (w)	0	588	75,600	129
Milano Finanza/Audipress (w)	0	386	73,000	189

ITALY: MAGAZINES

**Magazines (contd)**

<b>w=weekly m=monthly</b>		<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>
<b>Title</b>	<b>Circulation</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>
	<b>(000s)</b>	<b>(000s)</b>	<b>€</b>	<b>€</b>
<b>Men's</b>				
Max (m)	152	776	22,500	29
Men's Health (m)	145	525	38,000	72
XL (m)	141	417	50,000	120
Jack (m)	130	331	25,000	76
GQ (m)	130	505	30,000	59
Fox Uomo (m)	128	341	38,903	114
For Men Magazine (m)	127	422	41,800	99
<b>Science</b>				
Focus (m)	616	5,731	57,200	10
Le Scienze (m)	63	356	9,000	25
<b>Travel</b>				
Qui Touring (m)	326	591	35,000	59
National Geographic Italia (m)	124	927	42,000	45
Dove (m)	122	360	20,000	56
Panorama Travel (m)	88	339	28,500	84
Bell'Italia (m)	67	521	32,000	61
Gente Viaggi (m)	45	463	25,000	54
Partiamo (m)	42	102	22,050	216
Bell'Europa (m)	42	278	25,000	90
In Viaggio (m)	39	230	40,000	174
Tuttoturismo (m)	37	253	12,500	49
Meridiani (m)	25	134	11,500	86
I Viaggi di Repubblica (w)	0	843	50,000	59
<b>TV Listings</b>				
Sorrisi e Canzoni TV (w)	1,086	5,158	68,200	13
Telesette (w)	477	1,360	7,500	6
Guida TV (w)	292	1,116	10,000	9
Telepiù (w)	255	1,025	11,000	11
Film Tv (w)	29	151	24,000	159
<b>Furniture</b>				
Cose di casa (m)	433	1,448	11,600	8
Casa Facile (m)	260	713	23,250	33
Casaviva (m)	235	1,062	28,450	27
Brava Casa (m)	202	1,048	30,000	29
AD Architectural Digest (m)	127	523	32,000	61
Case da Abitare (m)	77	326	25,000	77
Elle Decor (m)	70	140	16,000	114
Marie Claire Maison (m)	63	188	16,000	85
Ville & Casali (m)	50	381	13,600	36
<b>News</b>				
Il Venerdì di Repubblica (w)	566	2,241	55,000	25
Corriere della Sera Magazine (w)	529	1,095	60,000	55
Panorama (w)	479	2,864	65,650	23
L'Espresso (w)	400	2,385	50,000	21

ITALY: MAGAZINES

**Magazines cont.**

w=weekly m=monthly		Adult	Full page	Adult CPT
Title	Circulation	readership	Colour	Colour
	(000s)	(000s)	€	€
<b>General/Others</b>				
Geo (m)	119	491	54,508	111
Airone (m)	94	588	40,000	68
Casa in fiore (m)	94	354	4,650	13
Club 3 (m)	93	140	11,970	86
Astra (m)	80	219	11,500	53
PC Professionale (m)	79	792	13,000	16
Gardenia (m)	58	294	30,000	102
Luoghi dell'Infinito (m)	56	113	9,000	80
Nautica (m)	28	312	8,000	26

Source: Audipress 2007\_2; ADS Jan-Dec 2007

**Average CPT (Colour): €35.0**

### Top ten magazine advertisers (2007)

Advertiser	Magazine expenditure €(mill)
Unilever	14.1
L'Oréal Saipo	12.2
Procter & Gamble	10.1
Volkswagen	9.9
L'Oréal Prod.Lusso It.	9.6
Calzedonia	7.5
Zero 9	7.3
Richemont Italia	7.1
Puntoshop	6.6
Monarimport	6.3

Source: AC Nielsen net values

### Top ten magazine product categories (2007)

Category	Magazine expenditure €(mill)
Clothing	327.2
Personal care	131.0
Household	126.5
Personal objects	83.8
Food	78.3
Auto	68.6
Tourism/travel	45.4
Finance/insurance	42.0
Toiletries	39.8
Telecommunications	36.6

Source: AC Nielsen net values

### Top ten magazine owners (2007)

Owner	Magazine revenue €(mill)
Mondadori	332.4
RCS	203.8
Manzoni	136.4
Condé Nast	126.4
Cairo	126.2
Rusconi	114.9
PRS	47.6
Class	36.9
Publikompass	28.5
Advergreen	24.0

Source: AC Nielsen net values

## RADIO

**Number of radio households: 20,700,000 (87.7%)**

Source: Audiradio 2007

**Number of commercial radio stations: 285**

Source: Audiradio 2007

**Average daily listening minutes per adult: 185**

Source: Audiradio 2007

### Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) (€)	Peak adult audience (000s)	30 sec peak adult CPT (€)
<b>National</b>					
RadioUno	news	0700-0715	9,800	1,621	6.0
RadioDue	news	0730-0745	3,400	928	3.7
RadioTre	news	0745-0800	2,200	608	3.6
IsoRadio	news/traffic	1000-1015	-	123	
R101	music/talk	1000-1015	660	268	2.5
Radio Montecarlo	music/talk	1000-1015	600	249	2.4
Radio Capital	music/talk	1000-1015	300	237	1.3
Radio DeeJay	music/talk	1000-1015	2,714	949	2.9
Radio Kiss Kiss	music	1000-1015	650	240	2.7
Radio 105 Network	music/talk	0800-0815	1,130	653	1.7
Radio Dimensione Suono	music	1000-1015	1,700	626	2.7
Radio Italia Solo Musica italiana	music	1000-1015	1,350	514	2.6
RTL 102.5	music	1000-1015	1,386	623	2.2
Radio 24	news	0800-0815	643	304	2.1
Radio M2O	music	1700-1715	657	114	5.8
<b>Syndication</b>					
Radio Cuore	music	1015-1030	350	92	3.8
Radio Lattemiele	music	1000-1015	480	118	4.1
Radio Margherita	music	1000-1015	250	187	1.3
CNR	music	1000-1015	2,000	867	2.3
Radio Italia Anni 60	music	1000-1015	550	177	3.1

Source: Audiradio 2007

**Average CPT (all commercial stations): €3.3**

## Top ten radio advertisers (2007)

Advertiser	Radio expenditure €(mill)
Volkswagen	16.9
Fiat	14.0
Expert Italy	11.3
Citroen	7.3
Toyota	7.2
ENI Roma	6.8
Opel GM	6.5
Unilever	6.4
Renault	5.8
Ford	5.6

Source: AC Nielsen net values

## Top ten radio product categories (2007)

Category	Radio expenditure €(mill)
Auto	112.5
Media/publishing	64.8
Distribution	33.3
Food	32.9
Finance/insurance	28.8
Telecommunications	25.8
Beverages/alcohol	20.0
Public bodies	16.9
Pharmaceutical	15.8
Motorcycles/vehicles	15.7

Source: AC Nielsen net values

## Top radio owners (2007)

Owner	Radio revenue €(mill)
Sipra	85.3
RDS Advertising	58.0
Radio E Reti	57.8
PRS	40.0
Openspace	48.6
Mondadori	15.0
Manzoni	83.5
Gruppo Finelco-Nove Nove	76.6
24 Ore System	11.9

Source: ZenithOptimedia records



# OUTDOOR

Number of outdoor sites: 156,739

## Type, size and cost of sites

Type/size of display	Number of sites	Size	Cost 14 days per panel €
Poster	31,934	6x3	1,470
Backlight	785	6x3	4,000
Special sites	124,020	100x140	260
		140x200	500
Street furniture to face	-	120x180	760

Source: Audiposter

## Top ten outdoor advertisers (2007)

Advertiser	Outdoor expenditure €(mill)
Telecom Italia	11.2
vodafone	10.2
Calzedonia	6.6
Renault	5.2
ING direct	4.7
Pernod Ricard	4.0
Sky Italia	3.8
Volkswagen	3.7
Wind Telecom.	3.6
DPS Daihatsu	3.3

Source: AC Nielsen net values

## Top ten outdoor product categories (2007)

Category	Outdoor expenditure €(mill)
Auto	33.8
Clothing	33.2
Telecoms	32.1
Food	18.7
Finance/insurance	14.9
Media/publishing	14.2
Distribution	13.0
Household	12.6
Beverages/alcohol	12.2
Tourism/travel	8.6

Source: AC Nielsen net values

## Top outdoor contractors (2007)

Contractor	Outdoor revenue €(mill)
IGP Decaux	167
Clearchannel	136
Viacom	70
Pes-Ima	41
IPAS	25

Source: Owners

# CINEMA

**Number of cinema screens: 2,963**

Source: Audimovie

**Average cost of a 60 sec. spot per screen per week: €332.2**

Source: Cinema owners

**Number of screens used in typical national campaign: 378**

Source: Cinema owners

## Trend in admissions

	Admissions (mill)	Gross takings €(mill)
2002	89	523.6
2003	87	521.0
2004	97	575.8
2005	90	534.7
2006	92	547.1
2007	104	617.1

Source: Cinetel

## Cinema audience profile

<b>Age</b>	<b>%</b>
14-24	30.7
25-34	27.9
35-44	21.1
45-54	10.2
55+	10.0
<b>Sex</b>	<b>%</b>
Male	50.3
Female	49.7
<b>Class distribution</b>	<b>%</b>
Upper	24.7
Middle	59.1
Lower	16.2

Source: Sinottica 2008\_1

**Top ten films (2007)**

Film	Gross takings
	€(000s)
Natale In Crociera	21,996
Shrek 3	20,234
Manuale D'amore 2 - Capitoli Successivi	19,032
Harry Potter And The Order Of The Phoenix	18,631
Spider-Man 3	18,055
Una Moglie Bellissima	17,556
Ratatouille	17,391
Pirates Of The Caribbean: At World's End	16,429
The Simpsons Movie	16,202
The Pursuit Of Happyness	15,575

Source: Cinetel

**Top ten cinema advertisers (2007)**

Advertiser	Cinema expenditure
	€(mill)
Renault	4.4
Ferrero	2.9
Fiat	2.8
Toyota	2.5
Freddy	2.3
Binda	1.9
Costa Crociere	1.8
Barilla Alimentare	1.7
Coca Cola	1.2
Monte Dei Paschi	1.2

Source: AC Nielsen net values

**Top ten cinema product categories (2007)**

Category	Cinema expenditure
	€(mill)
Auto	17.3
Food	10.8
Clothing	6.8
Beverages/alcohol	4.5
Personal objects	4.2
Telecommunications	3.9
Finance/insurance	3.9
Public bodies	2.9
Tourism/travel	2.8
Media/publishing	2.5

Source: AC Nielsen net values

**Top cinema sales houses (2007)**

Sales house	Screens owned
Movie Media	231
Opus	580
Sipra	395
Media Mix	314
ColeUpCinema	427

Source: Cinema Owners

# INTERNET

**Homes with internet connection: 20,646,000 (87.5%)**

Source: Nielsen Net View by Audiweb

**Adult internet users: 23,996,000 (47.8%)**

Source: Nielsen Net View by Audiweb

**Adult internet users with home broadband: 11,873,335 (23.6%)**

Source: Eurisko Sinotiica 2008.1

**Typical monthly cost of internet access: €30.4**

Source: Eurisko New Media 2008.A

## Cost of display ads

Type	Typical cost per thousand (€)
banner (ex 300*250)	6/9.3
pop-up	13/16
streaming video	20/34
advertorial	5/15
dem	15/34
newsletter	10/25
leaderboard	4/15

Source: Zed Digital Italy benchmark

## Top ten search keywords

Keyword	Typical cost per click (€)
youtube	1.21
libero	0.66
you tube	0.95
meteo	1.13
giochi	0.40
ebay	0.50
yahoo	0.50
msn	0.62
badoo	0.77
google	1.89

Source: Google Insight/Traffic estimator

## Internet user profile

Age	%
16-24	13.3%
25-34	21.8%
35-54	43.3%
55-64	10.2%
65+	3.5%
Sex	%
Male	56.3%
Female	43.7%
Income/Class	%
Upper	14.1%
Middle	59.2%
Lower	13.4%

Source: Nielsen Net View by Audiweb

## ITALY: INTERNET

### Top ten internet sites (2007)

Site	Unique visitors per month (000s)
google.it	18,317
google.com	12,456
libero.it	10,980
alice.it	10,506
live.com	9,970
ebay.it	9,320
yahoo.it	8,594
wikipedia.org	7,626
youtube.com	7,013
msn.com	6,723

Source: Nielsen Net View (Dec 2007)

### Top ten search engines (2007)

Search engine	Sessions per month (000s)
google search	274,990
virgilio	16,881
msn	12,692
libero	11,755
yahoo	10,340
altavista	2,835
interfree	2,612
snap	977
bloo	771
tuttogratis	679

Source: Nielsen Net View by Audiweb

### Top ten internet advertisers (2007)

Advertiser	Internet expenditure €(mill)
Dada	11.7
Ebay	8.9
Vodafone	6.6
Microsoft	5.7
Sky Italia	5.0
Telecom Italia	4.8
Ilius Boulogne	3.8
Sonera Zed	3.6
Renault	3.6
ENI Roma	3.3

Source: AC Nielsen net values

### Top ten internet product categories (2007)

Category	Internet expenditure €(mill)
Telecommunications	43.0
Finance/insurance	30.1
Media/publishing	28.7
Leisure	22.2
Auto	21.3
Tourism/travel	16.5
Informatics/photography	14.0
Professional services	13.1
Public bodies	7.3
Distribution	6.9

Source: AC Nielsen net values

## MEDIA REACH

### % reach by medium (adults)

	Daily	Weekly	Monthly
Conventional television	81.2	93.0	97.9
Newspapers	-	65.5	79.6
Weekly magazines	-	47.1	-
Monthly magazines	-	-	42.2
Radio	73.3	87.2	-
Cinema	-	5.0	16.6
Internet	-	31.3	36.1

Source: Auditel, Audioradio, Audipress, Sinottica, Auditel (March '07)

## OVERALL

### Top ten overall advertisers (2007)

Advertiser	Media expenditure €(mill)
Ferrero	164.9
Unilever	164.5
Vodafone	149.8
Wind Telecoms	149.4
Procter & Gamble	119.0
Telecom Italia	117.0
Barilla Alimentare	110.5
Fiat	98.6
Volkswagen	97.2
L'Oréal Saipo	90.1

Source: AC Nielsen net values

### Top ten overall product categories (2007)

Category	Media expenditure €(mill)
Food	1,111.9
Auto	994.7
Telecommunications	751.9
Clothing	592.9
Beverages/alcohol	473.3
Media/publishing	472.9
Finance/insurances	430.3
Personal care	379.8
Toiletries	317.4
Household	316.4

Source: AC Nielsen net values

### Top ten media owners (2007)

Owner	Media revenue €(mill)
Publitalia	3,032.1
Sipra	1,456.3
Manzoni	389.0
Mondadori	377.6
RCS	367.8
Cairo	250.4
Publikompass	240.7
24 Ore System	161.3
Piemme	139.7
Condé Nast	126.4

Source: AC Nielsen net values

# NETHERLANDS

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$ = 0.73 € at 2007 rate								
<b>Gross Domestic Product (€billion)</b>								
at current prices	418.0	447.7	465.2	476.9	491.2	513.4	539.9	567.1
% change	8.2	7.1	3.9	2.5	3.0	4.5	5.2	5.0
at 2007 prices	485.7	499.3	502.4	504.2	513.3	527.5	548.4	567.1
% change	8.4	2.8	0.6	0.4	1.8	2.8	4.0	3.4
<b>Gross Domestic Product per capita (€000s)</b>								
at current prices	26.3	28.0	28.9	29.5	30.2	31.4	33.0	34.5
at 2007 prices	30.5	31.2	31.2	31.1	31.6	32.3	33.5	34.5
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	572.1	612.8	636.7	652.8	672.3	702.7	739.0	776.2
at 2007 prices	664.8	683.4	687.6	690.2	702.6	722.0	750.6	776.2
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	35.9	38.3	39.5	40.3	41.3	43.0	45.1	47.3
at 2007 prices	41.8	42.7	42.7	42.6	43.2	44.2	45.8	47.3
<b>Population</b>								
Millions	15.9	16.0	16.1	16.2	16.3	16.3	16.4	16.4
<b>Consumer Price Index</b>								
2007=100	86.1	89.7	92.6	94.6	95.7	97.3	98.5	100.0
% change	3.0	4.2	3.3	2.1	1.2	1.7	1.1	1.6
<b>Ad.spend as a % of GDP</b>								
	0.93	0.83	0.78	0.72	0.70	0.68	0.68	0.68
<b>Advertising Expenditure Growth (%)</b>								
at current prices	7.8	-4.2	-2.7	-4.5	-0.7	2.0	4.3	5.0
at 2007 prices	4.7	-8.0	-5.7	-6.5	-1.8	0.3	3.2	3.4

Source: IFS, ZenithOptimedia

## ADVERTISING EXPENDITURE

### Advertising expenditure in €(mill) at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	3,031	1,442	739	572	164	10	104	-
1998	3,373	1,621	826	626	177	11	112	-
1999	3,595	1,690	880	678	194	12	121	20
2000	3,876	1,780	941	731	234	13	139	38
2001	3,715	1,710	925	695	218	9	137	21
2002	3,616	1,601	885	730	224	7	137	32
2003	3,453	1,493	800	746	245	7	122	40
2004	3,429	1,442	769	757	250	6	139	66
2005	3,499	1,432	780	779	253	7	151	97
2006	3,651	1,473	800	810	262	5	164	137
2007	3,835	1,531	807	863	274	5	165	190

### Advertising expenditure in €(mill) at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	3,763	1,790	917	710	204	12	129	-
1998	4,126	1,983	1,010	766	217	13	137	-
1999	4,303	2,022	1,053	811	233	14	145	24
2000	4,504	2,068	1,093	849	272	15	162	44
2001	4,142	1,907	1,032	775	243	10	153	23
2002	3,905	1,729	956	788	242	8	148	34
2003	3,651	1,579	846	789	259	7	129	42
2004	3,583	1,507	804	791	261	6	145	69
2005	3,595	1,471	801	800	260	7	155	100
2006	3,708	1,496	813	823	266	5	167	139
2007	3,835	1,531	807	863	274	5	165	190

Source: VEA, BBC, ZenithOptimedia estimates

Notes: 1. After discounts

2. Excludes production costs

3. Includes classified

4. Includes agency commission

5. Magazines include consumer and business titles

6. Includes expenditure by regional advertisers in regional media

7. Outdoor includes transport and ambient media

8. Internet includes display only.

#### Main advertising restrictions:

**Tobacco:** Banned.

**Alcohol:** Must not target under 18s. No outdoor advertising around schools or hospitals allowed. No links with sport, and two out of five TV ads must clearly show the warning against misuse of alcohol.

**Pharmaceutical:** Must be approved by the committee of inspection KOAG/KAG.

**Political:** Should be in line with the Dutch constitution.



# POPULATION

<b>Land area (km<sup>2</sup>)</b>	33,883
<b>Capital city</b>	Amsterdam
<b>Language</b>	Dutch
<b>Currency</b>	Euro (€)

Source: CIA Factbook 2008

## Population by age

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
0-15	1,605	1,532	3,137
16-24	905	876	1,781
25-34	1,008	1,006	2,015
35-44	1,301	1,276	2,578
45-54	1,205	1,190	2,395
55-64	1,049	1,036	2,085
65+	1,039	1,376	2,415
<b>Total</b>	<b>8,112</b>	<b>8,293</b>	<b>16,405</b>

Source: CBS

## Adult status

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
A	1,058	949	2,007
B1	1,977	1,921	3,898
B2	1,716	1,628	3,344
C	1,721	1,950	3,671
D	234	444	678
<b>Total</b>	<b>6,706</b>	<b>6,892</b>	<b>13,598</b>

Source: NOM

### Definition of adult status:

A = higher and intermediate managerial

B1 = supervisory/clerical

B2 = skilled manual

C = semi and unskilled manual

D = subsistence/inactive

# TELEVISION

**Number of households: 7,242,202**

**Number of television households: 7,097,358 (98.0%)**

**Television homes with:**

VCR 41.4%

DVD 60.9%

*Source: ZenithOptimedia records*

**Average minutes viewed per day per adult: 186**

## Main channels

Channel	Technical penetration (%)	Daily hours of transmission
<b>Non-commercial</b>		
NED 1	100	24
NED 2	100	24
NED 3	100	24
<b>Commercial</b>		
RTL 4	100	24
RTL 5	100	24
RTL 7	100	24
RTL 8	100	24
SBS 6	100	24
NET 5	100	24
Veronica	100	11
MTV	-	24
TMF	-	24
Comedy Central	-	9
Discovery Channel	-	24
NGC	-	24
Animal Planet	-	24
Het Gesprek	-	24

*Source: SKO*

NETHERLANDS: TELEVISION

**Cost/audience**

<b>Channel</b>	<b>Peak time</b>	<b>Peak rate 30 sec (€)</b>	<b>Peak adult audience (000s)</b>	<b>30 sec peak adult CPT (€)</b>
Ned 1	2000-2230	7,369	1,172	6.3
Ned 2	2000-2230	2,379	441	5.4
Ned 3	2000-2230	4,741	454	10.5
RTL 4	2000-2230	11,661	756	15.4
RTL 5	2000-2230	7,040	403	17.5
RTL 7	2000-2230	3,281	265	12.4
RTL 8	2000-2230	2,322	151	15.4
SBS 6	2000-2230	8,236	693	11.9
NET 5	2000-2230	7,646	302	25.3
Veronica	2000-2230	3,644	290	12.6
Tien	2000-2230	3,847	353	10.9
MTV	2000-2230	747	13	59.3
TMF	2000-2230	558	14	40.2

Source: SKO

**Average CPT (all commercial channels): €11.5**

**Share of viewing**

<b>Channel</b>	<b>Share of viewing (%) 2007</b>	
	<b>Individuals</b>	<b>Adults</b>
<b>Non-commercial</b>		
Ned 1	18.0	19.1
Ned 2	7.0	7.5
Ned 3	6.6	6.5
<b>Commercial</b>		
RTL 4	13.0	13.5
RTL 5	5.3	5.2
RTL 7	4.7	4.8
RTL 8	0.7	0.7
SBS 6	10.1	10.4
NET 5	4.6	4.6
Veronica	3.7	3.5
MTV	0.8	0.6
TMF	0.8	0.5
Comedy Central	0.7	0.5
Discovery Channel	1.8	1.8
NGC	0.8	0.8
Het Gesprek	0.0	0.0

Source: SKO

NETHERLANDS: TELEVISION

**Top ten television programmes (2007)**

<b>Programme</b>	<b>Channel</b>	<b>Adult TVR</b>
Schaatsen WK Allround 10 km Heren	Ned 1	28.6
Voetbal Br AZ-Ajax	Tien	26.0
Schaatsen WK Allround Heren huldiging	Ned 1	25.8
Schaatsen WK Allround Dames huldiging	Ned 1	25.1
Schaatsen WK Allround 10 km Heren Commentary	Ned 1	24.9
Voetbal EK kw Nederland-Slovenië	SBS 6	24.8
Schaatsen WK Allround 5 km Dames	Ned 1	23.0
Voetbal EK kw Albanië-Nederland	RTL 4	23.0
Voetbal EK kw Nederland-Roemenië	SBS 6	23.0
Journal	Ned 1	22.5

Source: SKO

**Top ten television advertisers (2007)**

<b>Advertiser</b>	<b>TV expenditure €(mill)</b>
Unilever Foods	82.3
Unilever Home/Personal	80.7
Proctor & Gamble	77.5
L'Oréal	64.8
Reckitt Benckiser	51.2
KPN	49.2
Gillette Groep	40.6
Beiersdorf	40.1
Mars	39.8
Danone	37.7

Source: Nielsen

**Top ten television product categories (2007)**

<b>Category</b>	<b>TV expenditure €(mill)</b>
Food	493.5
Personal care/hygiene	379.2
Retail	330.3
Telecom/ICT	253.9
Financial services	250.4
Transport	167.9
Media	161.9
Tourism/travel	158.1
Laundry/detergent	114.8
Other services	105.4

Source: Nielsen

**Top television sales houses (2007)**

<b>Sales house</b>	<b>TV revenue €(mill)</b>
RTL Nederland	1,234.2
SBS Broadcasting	953.5
STER	427.8
MTV Networks	223.4
Other	180.1

Source: Nielsen

# NEWSPAPERS

## Newspapers

d=daily N=National R=Regional F=Free

Title	Circulation (000s)	Adult readership (000s)	Full page B/W €	Adult CPT B/W €	Full page Colour €
De Telegraaf (d, N)	635	2,207	37,489	17	56,233
Metro (d, F)	516	1,945	29,000	15	37,700
Dagblad de Pers (d, F)	479	820	27,200	33	35,380
AD (d, N)	425	1,561	44,305	28	58,812
Splts (d, F)	422	1,801	19,960	11	26,644
DAG (d, F)	380	-	17,195	-	21,494
De Volkskrant (d, N)	241	838	24,876	30	35,350
NRC Handelsblad (d, N)	208	578	27,275	47	38,759
Dagblad De Limburger (d, R)	180	569	19,681	35	25,094
De Gelderlander (d, R)	152	544	16,600	31	21,164
Noordhollands Dagblad (d, R)	136	429	13,801	32	19,728
Dagblad van het Noorden (d, R)	136	460	19,016	41	28,524
Brabants Pers Dagbladen (d, R)	129	807	12,856	16	16,391
De Stentor (d, R)	128	422	15,810	37	20,157
De Twentsche Courant Tubantia (d, R)	115	319	12,107	38	15,436
BN/DeStem (d, R)	114	365	12,606	35	16,072
Leeuwarder Courant/Friesch Dagblad (d, R)	107	319	12,320	39	18,480
Trouw (d, N)	94	244	8,000	33	12,000
Het Parool (d, R)	64	246	8,768	36	11,179
NRC.Next (d, N)	63	325	9,004	28	13,506
Het Financieele Dagblad (d, N)	56	177	20,475	116	29,220
Reformatorisch Dagblad (d, N)	55	165	5,246	32	7,868
Provinciale Zeeuwse Courant (d, R)	54	179	5,489	31	6,631
Haarlems Dagblad Combinatie (d, R)	39	143	5,610	39	8,415
Nederlands Dagblad (d, N)	32	159	3,754	24	5,068
De Gooi- en Eemlander (d, R)	27	-	3,795	-	5,693

Source: NOM/HOI/Retriever

**Average CPT (B/W): €24**

## Top ten newspaper advertisers (2007)

Advertiser	Newspaper expenditure €(mill)
Kras	43.6
KPN	34.0
Lidl	30.9
Aldi	14.7
Laurus	13.0
ABN-Amro	11.5
Min. VSW (Government)	10.8
Belcompany	10.5
T-Mobile	9.7
Dirk van den Broek	9.4

Source: Nielsen

### Top ten newspaper product categories (2007)

Newspaper expenditure	
Category	€(mill)
Retail	226.8
Tourism/traveling	141.3
Other services	77.4
Telecom/ICT	77.1
Financial services	67.5
Transport	50.9
Media	47.2
Education	38.5
Bussiness services	36.1
Government	22.7

Source: Nielsen

### Top newspaper owners (2007)

Newspaper revenue	
Owner	€(mill)
De Telegraaf	260.5
PCM	127.7
Wegener	170.4
AD Nieuwsmedia	85.4
Other	228.8

Source: Nielsen

# MAGAZINES

## Magazines

w=weekly f=fortnightly m=monthly bm=bimonthly q=quarterly	Circulation	Adult	Full page	Adult CPT	Full page
Title	(000s)	readership	Colour	Colour	B/W
		(000s)	€	€	€
<b>Automotive</b>					
Kampeer + Caravankampioen (m)	120	490	5,869	12	3,992
Autoweek (w)	110	919	7,770	8	7,770
Autovisie (f)	46	367	4,874	13	4,874
Truckstar (m)	43	249	4,570	18	2,285
Promotor (m)	35	110	3,493	32	2,653
Autokampioen (f)	33	336	5,050	15	3,428
Top Gear Magazine Nederland (m)	33	233	5,500	24	5,500
Formule 1 Race Report (f)	29	244	3,500	14	3,500
Motor (f)	27	151	3,210	21	1,605
Moto 73 (f)	26	165	3,370	20	1,685
GTO (bm)	24	149	4,250	28	4,250
<b>Computer</b>					
Computer! Totaal	144	632	7,875	12	7,875
Computer Idee (f)	90	805	6,318	8	6,318
Tips & Trucs (m)	63	371	3,822	10	3,822
PCM (m)	46	304	4,400	14	4,400
Power Unlimited (m)	45	263	5,634	21	5,634
<b>Culinary</b>					
Elle Eten (bm)	70	174	5,500	32	5,500
Delicious (m)	65	162	7,500	46	7,500
<b>Family</b>					
Kampioen (m)	3,488	5,494	48,639	9	41,132
PLUS Magazine (m)	304	1,070	11,470	11	11,470
TeleVizier (w)	172	358	5,460	15	3,824
Readers Digest / Het Beste (m)	128	622	6,500	10	6,500
Panorama (w)	91	1,289	9,750	8	9,750
ZIN (m)	84	282	5,250	19	5,250
Party (w)	69	747	3,630	5	3,630
Revu (w)	64	871	8,240	9	8,240
Ook! (m)	40	107	4,250	40	4,250
<b>Living</b>					
VT Wonen (m)	125	926	13,410	14	13,410
Seasons (m)	101	532	6,845	13	6,845
Ariadne at Home	99	314	6,990	22	6,990
101 Woonideeën m)	79	345	6,540	19	6,540
Groei & Bloei (m)	75	287	2,938	10	2,219
Buitenleven (8xy)	67	101	3,950	39	2,959
Living (m)	63	209	6,800	33	6,800
Eigen Huis & Interieur (m)	57	476	8,450	18	8,450
Elle Wonen (m)	56	288	6,560	23	6,560
Home and Garden (m)	51	307	5,920	19	5,920
Tuin & Co (m)	50	384	3,990	10	3,990
More than Classic (bm)	45	118	5,600	48	5,600
Residence (m)	29	151	5,800	38	5,800

## NETHERLANDS: MAGAZINES

## magazines cont.

w=weekly f=fortnightly m=monthly bm=bimonthly q=quarterly	Circulation	Adult	Full page	Adult CPT	Full page
Title	(000s)	readership	Colour	Colour	B/W
		(000s)	€	€	€
<b>Management</b>					
Intermediair Weekblad (w)	256	677	16,975	25	11,980
Weekblad Volkskrant Banen (w)	103	231	7,500	33	11,250
Quote (m)	52	356	6,360	18	6,360
FEM Business (w)	23	99	6,149	62	4,805
Bizz (m)	5	101	12,739	126	8,587
Management Team (f)	1	332	11,615	35	7,050
Carp (f)	123	186	11,371	61	8,808
<b>Men's</b>					
Men's Health (m)	50	260	4,820	19	4,820
FHM (m)	48	302	4,591	15	4,591
Playboy (m)	48	453	8,990	20	8,990
Grasduinen (m)	22	248	3,750	15	3,750
<b>News</b>					
Volkskrant magazine	342	791	11,150	14	11,150
M (NRC Handelsblad) (w)	299	291	12,500	43	12,500
Elsevier (w)	143	830	12,900	16	10,207
Vrij Nederland (w)	47	308	5,840	19	5,840
HP/de Tijd (w)	31	304	4,560	15	4,560
<b>Science</b>					
Quest (m)	174	1,018	6,360	6	9,250
Psychologie Magazine (m)	120	513	7,985	16	7,985
National Geographic (m)	118	868	10,125	12	10,125
Kijk (m)	52	318	7,700	24	7,700
Triv' (m)	38	145	4,000	28	4,000
Wetenschap in Beeld (m)	21	-	2,950	-	2,950
<b>Special interest</b>					
NI20 (f)	88	114	3,250	29	3,250
<b>Sponsored</b>					
Allerhande (m)	2,132	4,064	29,400	7	29,400
Health (q)	1,409	845	17,994	21	17,994
<b>Sport</b>					
Voetbal International (w)	169	1,133	10,980	10	10,980
GOLFjournaal (m)	133	119	7,160	60	7,160
Runner's World (m)	42	160	3,130	20	3,130
Sportweek (w)	39	287	5,740	20	5,740
Fiets (bm)	34	132	3,500	26	2,185
Voetbal Magazine (m)	29	282	4,798	17	4,798
FietsActief (bm)	27	202	3,230	16	2,015
Golfers Magazine (m)	17	90	4,410	49	4,410
<b>Travel</b>					
Toeractief (bm)	53	159	2,460	15	1,770
Reizen (m)	41	265	3,659	14	2,622
Waterkampioen (f)	39	173	4,569	26	3,111
Op Pad (m)	37	144	4,512	31	3,070



## NETHERLANDS: MAGAZINES

## magazines cont.

w=weekly f=fortnightly m=monthly bm=bimonthly q=quarterly	Circulation	Adult	Full page	Adult CPT	Full page
Title	(000s)	readership	Colour	Colour	B/W
		(000s)	€	€	€
<b>TV listings</b>					
Veronica Magazine (w)	1,004	2,868	19,945	7	19,945
Troskompas (w)	455	1,044	8,090	8	8,090
Mikro Gids (w)	450	1,031	6,770	7	4,736
VARA TV Magazine (w)	378	928	9,487	10	9,487
AVRObode (w)	359	784	8,850	11	6,192
NCRV-gids (w)	256	609	7,690	13	5,384
VPRO Gids w)	224	562	6,680	12	3,800
TV Krant (w)	209	554	4,570	8	4,570
Visie (w)	153	431	4,203	10	3,009
KRO Magazine (w)	146	275	4,420	16	3,096
TVFilm (f)	108	359	4,950	14	4,950
TotaalTV (f)	45	133	2,950	22	2,950
<b>Parenting</b>					
Wij Jonge Ouders (m)	215	421	6,950	17	9,550
Kinderen (m)	66	336	6,990	21	6,990
Ouders van Nu (m)	65	415	7,090	17	7,090
J/M (m)	46	203	4,095	20	4,095
<b>Women's</b>					
Gezond NU (m)	60	183	5,972	33	5,972
Libelle (w)	493	2,752	25,900	9	25,900
Margriet (w)	311	1,995	19,970	10	19,970
Privé (w)	226	2,100	10,717	5	10,717
Happinez (8xy)	157	393	10,250	26	10,250
Weekend (w)	157	1,655	6,950	4	6,950
Story (w)	156	1,759	7,310	4	7,310
Glamour (m)	140	359	10,750	30	10,750
LINDA. (m)	137	795	8,999	11	0
Vriendin (w)	129	848	6,650	8	6,650
Flair (w)	116	792	9,200	12	9,200
Cosmopolitan (m)	106	542	11,950	22	11,950
Viva (w)	97	679	8,190	12	8,190
Glossy (m)	88	467	6,450	14	6,450
Elle (m)	83	357	9,530	27	9,530
Beau Monde (m)	82	484	7,390	15	7,390
Marie Claire (m)	75	201	8,990	45	8,990
Opzij (m)	75	286	7,900	28	7,900
Esta	74	303	6,426	21	6,426
Santé (m)	69	282	6,920	25	6,920
Nouveau (m)	63	275	8,990	33	8,990
Stars (m)	61	130	2,995	23	2,995
JAN (m)	61	490	8,250	17	8,250
Red (m)	59	165	6,995	42	6,995
Knip Mode (m)	58	355	6,350	18	6,350
Celebrity (m)	57	181	5,250	29	5,250
Yes (w)	57	547	6,890	13	6,890
Grazia (w)	53	-	6,000	-	6,000
Mijn Geheim (w)	53	434	2,500	6	2,500

NETHERLANDS: **MAGAZINES**

**magazines cont.**

<b>w=weekly f=fortnightly m=monthly bm=bimonthly q=quarterly</b>	<b>Circulation</b>	<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>	<b>Full page</b>
<b>Title</b>	<b>(000s)</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>	<b>B/W</b>
		<b>(000s)</b>	<b>€</b>	<b>€</b>	<b>€</b>
Eva	49	200	2,026	10	1,752
Midi (m)	47	218	5,000	23	5,000
Elegance (m)	47	239	8,248	34	8,248
AvantGarde (m)	38	232	7,995	34	7,995
Vorsten Royale (m)	38	312	3,600	12	3,600
<b>Youth/children's</b>					
Donald Duck (w)	312	1,784	12,810	7	12,810
CosmoGIRL! (m)	105	339	6,626	20	6,626
Girlz! (m)	103	267	5,850	22	5,850
ELLEgirl	88	238	5,440	23	5,440
Fancy (w)	72	252	6,630	26	6,630
Tina (w)	53	270	4,150	15	4,150
Hitkrant (w)	48	293	5,052	17	5,052
Teletubbies (bm)	14	133	2,490	19	2,490

Source: ZenithOptimedia records

**Average CPT (Colour): €13.6**

### Top ten consumer magazine advertisers (2007)

Advertiser	Magazine expenditure €(mill)
Unilever Foods	16.4
Unilever Home/Personal	11.2
L'Oréal Divisie Luxe Producten	6.3
Beiersdorf	5.8
L'Oréal	4.8
Adcom Media	3.8
Renault	3.4
Risia Financieringen	3.3
NTI	3.2
Lenen.NL	2.9

Source: Nielsen

### Top consumer magazine product categories (2007)

Category	Magazine expenditure €(mill)
Personal Care/Hygiene	47.9
Food	42.6
Financial Services	36.6
Textile/Shoes	32.0
Retail	31.3
Telecom/ICT	28.8
Tourism/Travelling	27.0
Media	25.4
Transport	24.3

Source: Nielsen

### Top consumer magazine owners (2007)

Owner	Magazine revenue €(mill)
Sanoma	139.9
Veronica	33.0
Reed Elsevier	27.8
Hachette/Fillipacchi	20.2
Audax	19.4
Other	189.6

Source: Nielsen

# RADIO

**Number of radio households: 6916300 (95.5%)**

Source: RAB

**Number of commercial radio stations: 15**

Source: RAB

**Average daily listening minutes per adult: 192**

Source: RAB

## Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) (€)	Peak adult audience (000s)	30 sec peak adult CPT (€)
<b>National</b>					
Radio 1	news/sport	0700-1900	750	201	3.7
Radio 2	music	0700-1900	990	375	2.6
Radio 3	music young	0700-1900	1,260	250	5.0
Radio 4	music classic	0700-1900	150	54	2.8
Radio 5	spoken	0700-1900	150	76	2.0
Radio 538	music young	0700-1900	2,006	318	6.3
Sky Radio	music main	0700-1900	1,230	318	3.9
Q-Music	music main	0700-1900	825	209	4.0
Radio Veronica	70/80/90s	0700-1900	840	186	4.5
Radio 10 Gold	60/70/80s	0700-1900	244	99	2.5
CAZ!	music young	0700-1900	135	13	10.5
Classic FM	music classic	0700-1900	150	69	2.2
ARROW Classic Rock	music rock	0700-1900	375	69	5.5
SLAM!FM	music alternative	0700-1900	287	46	6.3
ARROW Jazz FM	music jazz/world	0700-1900	150	17	8.9
BNR Nieuwsradio	news/sport	0700-1900	394	18	21.5
Kink FM	music alternative	0700-1900	45	10	4.5
100%NL	music urban	0700-1900	186	36	5.1
TMF Radio	music young	0700-1900	65	6	11.2
<b>Main regional</b>					
ORN	news/music	0700-1900	704	437	1.6
E-Power	music rock	0700-1900	377	60	6.3

Source: CLO/rate card

**Average CPT (all commercial stations): €3.9**

## Top ten radio advertisers (2007)

Advertiser	Radio expenditure €(mill)
Rabobank	13.9
KPN	13.4
@Home	8.0
Unilever Foods	7.4
Carglass	6.0
ING Bank	5.6
ABN-AMRO	5.5
NS	5.4
General Motors/Opel	5.4
Renault Nissan	5.2

Source: Nielsen

## Top ten radio product categories (2007)

Category	Radio expenditure €(mill)
Financial services	112.0
Telecom/ICT	59.7
Retail	54.6
Media	48.4
Transport	43.4
Business Services	42.5
Tourism/Travelling	39.2
Other Products/services	30.7
Education	23.5
Food	22.2

Source: Nielsen

## Top radio sales houses (2007)

Sales house	Radio revenue €(mill)
RTL Nederland	157.1
Telegraaf Media Groep	130.3
STER	129.8
Q-Music	50.9
ORN	23.8
Other	43.9

Source: Nielsen

# OUTDOOR

## Type, size and cost of sites

Type/size of display	Number of sites	Cost per panel per month (€)
CBS Outdoor abri	4,500	217
CBS Outdoor billboard	325	862
JCDecaux abri	2,823	271
JCDecaux billboard	405	1,136
Hillenaar abri	1,295	370
Hillenaar billboard	750	1,567
Brouwer & Partners abri	1,210	248
Brouwer & Partners billboard	35	650
Interbest (pylon by motorway)	81	± 15.100

Source: Rate cards

## Top ten outdoor advertisers (2007)

Advertiser	Outdoor expenditure €(000s)
Unilever Foods	7,893
KPN	5,528
Samsung	5,183
Beiersdorf	4,592
Sanoma Uitgevers	4,403
T-Mobile	4,251
SENS	4,124
Unilever Home/Personal Care	3,938
Rabobank	3,848
C & A	3,405

Source: Nielsen

## Top ten outdoor product categories (2007)

Category	Outdoor expenditure €(000s)
Media	31,873
Tourism/travel	30,994
Telecom/ICT	28,358
Financial services	23,774
Food	22,881
Retail	22,123
Other products/services	18,545
Transport	13,957
Personal care/hygiene	13,279
Business services	11,936

Source: Nielsen

## Top outdoor contractors (2007)

Contractor	Outdoor revenue €(000s)
CBS Outdoor	108,971
JCDecaux	92,307
Interbest	28,564
Other	33,523

Source: Nielsen

# CINEMA

## Number of cinema screens: 303

Source: Jean Mineur Mediavision

## Average cost of a 30 sec. spot per 1000 visitor per week: €90

Source: Jean Mineur Mediavision

## Cinema audience profile

Age	%
16-24	31
25-34	23
35-49	24
50+	9
Sex	%
Male	49
Female	51

Source: ZenithOptimedia records

## Top films (2007)

Film
Harry Potter and the Order of the Phoenix
Pirates Of The Caribbean 3: At World's End
Alles Is Liefde
Shrek 3
Ratatouille
Mr. Bean's Holiday
The Bourne Ultimatum
Ocean's 13
Spider-Man 3

Source: Jean Mineur Mediavision

## Top ten cinema advertisers (2007)

Advertiser
Coca Cola
Grolsch
Ned. Vereniging Bioscoopexploitanten
Bacardi
Mars
Heineken
WE International
Scholier
Sony
Diageo

Source: Jean Mineur mediavision

## Top cinema owners (2007)

Owner	Cinema revenue €(000s)
Pathé	58,672
Jogchem's	31,897
Minerva	17,606
Wolff	15,333
Other	36,171

Source: Jean Mineur Mediavision

## Top cinema sales houses (2007)

Sales house	Cinema revenue €(000s)
Jean Mineur	12,652
Screen-Vision	4,196

Source: Nielsen



# INTERNET

**Adult internet users: 10,750,000 (81.0%)**

**Adult internet users with home broadband: 840,000 (6.3%)**

**Typical monthly cost of internet access: €20**

## Cost of display ads

Type	Typical cost per thousand (€)
banner	2
streaming video	45

Source: STIR

## Top ten internet sites (2007)

Site	Unique visitors per month (000s)
Hyves	7,201
Marktplaats	6,427
Startpagina	4,948
Buienradar	4,780
De Telefoongids	4,502
MSN	4,005
NOS	3,757
Nu	3,663
Telegraaf	2,964
Web-log	2,874

Source: STIR, August 2008, all 13+

## Top search engine (2007)

Search engine
Google*

Source: Zed digital

\*Takes around 90% market share

### Top ten internet advertisers (2007)

Advertiser	Internet expenditure €(000s)
KPN	7,105
Nationale Postcode Loterij	5,485
T-Mobile	3,540
Tele2/Versatel	3,454
Gsmweb.NL	3,303
Unilever Foods	2,966
DSB	2,959
Air France KLM	2,877
ING Bank	2,840
ABN-AMRO	2,567

Source: Nielsen

### Top ten internet product categories (2007)

Category	Internet expenditure €(000s)
Telecom/ICT	35,219
Financial services	30,208
Media	29,108
Tourism/travel	28,382
Retail	17,621
Business services	16,318
Other products/services	14,043
Transport	10,254
Education	10,113
Government	7,858

Source: Nielsen

### Top internet sales houses (2007)

Sales house	Pageviews per month (000s)
Hyves	3,487,359
Ilse Media	1,041,186
Marktplaats	997,341
Publieke Omroep	648,589
AdLINK	445,317
WebAds	359,650
Telegraaf	320,975
RealGames	186,093
Funda	152,269

Source: STIR, August 2008, all 13+

# OVERALL

## Top ten overall advertisers (2007)

Advertiser	Media expenditure €(mill)
Unilever Foods	123.5
KPN	115.8
Unilever Home/Personal Care	104.0
Proctor & Gamble	81.3
L'Oréal	71.8
Albert Heijn	55.7
Beiersdorf	54.1
Reckitt Benckiser	52.1
Kras	47.4
Mars	47.3

Source: Nielsen

## Top ten overall product categories (2007)

Category	Media expenditure €(mill)
Retail	1,155.9
Food	628.0
Financial Services	543.3
Telecom/ICT	513.4
Personal Care/hygiene	465.3
Tourism/travel	402.2
Media	355.2
Transport	316.9
Other products/services	275.7
Business services	252.2

Source: Nielsen

## Top ten media owners (2007)

Owner	Media revenue €(mill)
RTL Nederland	1,391.3
SBS	953.5
STER	557.6
De Telegraaf Media groep	390.8
MTV Networks	223.4
AD Nieuwsmedia	170.4
Sanoma Uitgevers	139.9
PCM	127.7
CBS Outdoor	109.0
JCDecaux	92.3

Source: ZenithOptimedia records

# NORWAY

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$ =	5.86							
	NKr at 2007 rate							
<b>Gross Domestic Product (NKr billion)</b>								
at current prices	1,481	1,537	1,532	1,594	1,743	1,946	2,162	2,289
% change	20.1	3.8	-0.3	4.0	9.4	11.6	11.1	5.9
at 2007 prices	1,665	1,677	1,651	1,676	1,824	2,005	2,177	2,289
% change	16.5	0.7	-1.5	1.5	8.9	9.9	8.6	5.1
<b>Gross Domestic Product per capita (NKr 000s)</b>								
at current prices	329.9	340.0	336.8	348.0	378.1	419.3	462.9	487.0
at 2007 prices	370.8	371.1	362.9	365.9	395.7	432.0	466.2	487.0
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	252.7	262.2	261.4	271.9	297.3	331.9	368.8	390.4
at 2007 prices	284.0	286.1	281.7	285.9	311.2	342.0	371.4	390.4
<b>Gross Domestic Product per capita (US\$)</b>								
at current prices	56,277	58,004	57,450	59,365	64,500	71,535	78,966	83,070
at 2007 prices	63,256	63,298	61,912	62,419	67,503	73,698	79,532	83,070
<b>Population</b>								
Millions	4.5	4.5	4.6	4.6	4.6	4.6	4.7	4.7
<b>Consumer Price Index</b>								
2007=100	89.0	91.6	92.8	95.1	95.6	97.1	99.3	100.0
% change	3.1	3.0	1.3	2.5	0.5	1.6	2.3	0.7
<b>Ad.spend as a % of GDP</b>								
	0.88	0.84	0.87	0.96	1.00	1.08	1.07	1.14
<b>Advertising Expenditure Growth (%)</b>								
at current prices	10.4	-0.8	3.6	14.9	12.9	20.8	10.5	12.9
at 2007 prices	7.1	-3.7	2.3	12.1	12.4	18.9	8.0	12.1

Source: IFS, ZenithOptimedia

# ADVERTISING EXPENDITURE

## Advertising expenditure in NKr (mill) at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	10,209	5,054	1,191	3,065	604	104	190	-
1998	10,885	5,278	1,325	3,413	546	135	188	-
1999	11,798	5,384	1,409	3,779	669	130	257	170
2000	13,026	5,557	1,548	4,630	604	124	263	300
2001	12,921	5,641	1,597	4,572	500	127	249	235
2002	13,383	5,930	1,601	4,458	649	120	375	250
2003	15,371	6,949	1,765	4,916	698	143	575	325
2004	17,359	8,033	1,929	5,196	941	147	658	455
2005	20,962	9,102	2,002	5,696	1,141	162	759	2,100
2006	23,155	9,836	2,086	5,923	1,124	173	894	3,119
2007	26,139	10,844	2,223	6,440	1,205	214	979	4,234

## Advertising expenditure in NKr (mill) at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	12,379	6,128	1,444	3,716	733	127	231	-
1998	12,906	6,258	1,572	4,046	647	160	223	-
1999	13,671	6,239	1,633	4,379	775	150	297	197
2000	14,642	6,246	1,740	5,204	679	140	295	337
2001	14,100	6,156	1,743	4,989	546	139	272	256
2002	14,422	6,391	1,725	4,804	699	129	404	269
2003	16,162	7,307	1,856	5,169	734	150	605	342
2004	18,167	8,407	2,019	5,438	985	154	689	476
2005	21,596	9,377	2,063	5,868	1,176	167	782	2,164
2006	23,321	9,907	2,101	5,965	1,132	174	900	3,141
2007	26,139	10,844	2,223	6,440	1,205	214	979	4,234

Source: AC Nielsen,

Notes: 1. Before discounts

2. Excludes classified advertising before 2006 except for newspapers, includes from 2007

3. Excludes production costs

4. Excludes agency commission

5. Magazines include business magazines

6. Internet includes display/classified/search

### Main advertising restrictions:

**Tobacco/alcohol:** Banned

**Pharmaceutical:** Some limitations

**Children's:** Some limitations

**Political:** Some limitations

## NORWAY: POPULATION

# POPULATION

Land area (km <sup>2</sup> )	307,442
Capital city	Oslo
Language	Norwegian
Currency	Krone

Source: CIA Factbook 2008

### Population by age

	Male (000s)	Female (000s)	Total (000s)
0-15	497	473	970
16-24	267	256	523
25-34	311	306	617
35-44	358	344	702
45-54	319	309	628
55-64	281	275	556
65+	292	394	686
Total	2,326	2,355	4,681

Source: Statistics Norway

### Adult status

	Male (000s)	Female (000s)	Total (000s)
AB	442	221	663
C1	208	247	455
C2	433	421	854
D	220	245	465
E	677	883	1,560
Total	1,980	2,017	3,997

Source: MMI Norsk Medieindeks

#### Definition of adult status:

AB = higher and intermediate managerial

C1 = supervisory/clerical

C2 = skilled manual

D = semi and unskilled manual

E = subsistence/inactive/students/pensioners/unemployed

# TELEVISION

**Number of households: 2,105,000**

**Number of television households: 2,105,000 (100%)**

**Television homes with:**

Colour	100.0%
VCR/DVD	56.5%
PVR/DVR	34.0%
Multiset	30.1%
Teletext	97.3%
Cable/IPTV	47.9%
Digital satellite dish/satellite dish (DTH) - total	30.3%
Analogue & digital terrestrial television (DTT)	20.3%

Source: TNS Sofres TVMP

**TV licence cost (per year): NKr 2,600**

**Average minutes viewed per day per adult: 154**

**Average pay-TV subscription cost (per month):**

	Average subscription (NKr)
Cable (digital)	230
DTH (digital)	180
DTT	260
IPTV	300

Source: [Viasat.no](http://Viasat.no)/[CanalDigital.no](http://CanalDigital.no)/[RiksTV.no](http://RiksTV.no)

## NORWAY: TELEVISION

### Main channels

Channel	Technical penetration (%)	Daily hours of transmission	Ad mins per week
<b>Non-commercial</b>			
NRK1	100.0	18	-
NRK2	93.9	11	-
NRK3/Super	80.2	11	-
<b>Commercial</b>			
TV2	98.6	19.5	1,380
TVNORGE	93.9	20	1,400
TV3	80.4	22	1,300
TV2 Zebra	77.4	19.5	1,300
Discovery Channel	72.9	24	680
MTV	59.7	24	680
Viasat4	57.8	22	1,300
FEM	50.5	22	1,365

### Cost/audience

Channel	Peak time	Peak rate 30 sec NKr	Peak adult audience (000s)	30 sec peak adult CPT NKr
TV2	1800-2300	73,676	326	226.0
TVNORGE	1800-2300	18,531	87	213.0
TV3	1800-2300	8,319	43	193.5
TV2 Zebra	1800-2300	5,198	23	226.0
Discovery Channel	1800-2300	1,051	11	95.6
Viasat4	1800-2300	1,741	9	193.5
FEM	1800-2300	852	4	213.0
MTV	1800-2300	168	2	84.1

Source: ZenithOptimedia records

**Average CPT (all commercial channels): NKr 217**



NORWAY: TELEVISION

**Share of viewing & ad revenue**

Channel	Share of viewing (%) 2007		Gross Ad turnover 2007
	Individuals	Adults	NKr (mill)
<b>Non-commercial</b>			
NRK1	37.4	37.6	-
NRK2	3.3	3.4	-
NRK3/Super	0.5	0.4	-
<b>Commercial</b>			
TV2	28.4	28.9	3,793
TVNORGE	9.1	9.4	1,414
TV3	5.2	5.4	830
TV2 Zebra	2.3	2.4	178
Discovery Channel	1.4	1.5	70
Viasat4	0.5	0.6	84
MTV	0.3	0.3	-
FEM	0.2	0.2	11

Source: TNS Sofres TVMP & Nielsen Media Research

**Top ten television programmes (2007)**

Programme	Channel	Adult TVR
Kvelden før kvelden	NRK1	34.7
Nytt på nytt	NRK1	34.1
Idol - resultater	TV 2	29.4
Beat for beat - tone for tone	NRK1	29.3
EM-kval: Norge - Tyrkia	TV 2	28.6
Først & sist med Fredrik Skavlan	NRK1	28.5
Skal vi danse	TV 2	28.1
Senkveld med Thomas og Harald	TV 2	27.7
Jakten på kjærligheten	TV 2	27.5
Jul i borettslaget	NRK1	27.2

Source: TNS Sofres TVMP

## NORWAY: TELEVISION

### Top ten television advertisers (2007)

Advertiser	TV expenditure NKr (mill)
Lilleborg	218.5
Tele2 Norge	136.2
L'Oréal	109.9
Norsk Tipping	109.9
Procter & Gamble	107.3
Canal Digital	97.8
Universal Music	92.4
Telenor Mobil	90.8
Cubus	74.9
Nidar	67.5

Source: AC Nielsen Media Research

### Top ten television product categories (2007)

Category	TV expenditure NKr (mill)
Chains	806.2
Telecommunications	643.3
Music	324.8
Packaged food/goods	258.5
Cars	253.7
Fresh food	208.1
Soft drinks	197.3
Clothes	189.2
TV channels/radio stations	181.0
Banking/finance	164.0

Source: AC Nielsen Media Research

### Top television owners (2007)

Owner	TV revenue NKr (mill)
TV 2	3,793.4
TVN	1,414.1
TV3	830.2
TV 2 Zebra	178.1
Viasat 4	83.8
Discovery	70.4
ZTV	59.3
FEM	10.5

Source: AC Nielsen Media Research

# NEWSPAPERS

## Newspapers

d=daily w=weekly R=Regional N=National Title	Circulation (000s)	Adult readership (000s)	Full page B/W NKr	Adult CPT B/W NKr	Full page Colour NKr
VG Lørdag (w, N)	408	1,404	148,000	105	294,000
VG (d, N)	310	1,213	120,000	99	240,000
Aftenposten Lørdag (w, N)	277	719	155,191	216	171,878
VG Søndag (w, N)	263	868	99,000	114	199,000
Aftenposten morgen (d, N)	250	758	150,185	198	166,872
Dagbladet Lørdag (w, N)	231	988	104,025	105	162,475
Aftenposten Søndag (w, N)	219	549	133,498	243	150,185
Dagbladet (d, N)	136	624	77,675	124	121,200
Aftenposten aften (d, R)	131	386	63,857	165	79,821
Dagbladet Søndag (w, N)	120	487	60,450	124	93,950
Byavisa Trondheim (d, R)	92	92	31,900	347	31,900
BT Søndag (w, R)	88	217	101,950	470	101,950
Dagens Næringsliv (d, N)	81	285	126,250	443	126,250
Adresseavisen (d, R)	80	232	85,424	368	103,408
Østkantavisen (d, R)	71	44	29,920	680	29,920
Dagens Næringsliv Lørdag (w, N)	71	323	141,400	438	141,400
Stavanger Aftenblad (d, R)	68	183	63,611	348	75,411
Fædrelandsvennen (d, R)	41	112	51,141	457	56,823
Drammens Tidende (d, R)	41	112	45,525	406	45,525
Drammens Tidende Søndag (w, R)	41	89	45,525	512	45,525
Romerikes Blad (d, R)	38	109	33,500	307	43,820
Sunnmørsposten (d, R)	34	96	48,125	501	48,125
Haugesunds Avis (d, R)	33	82	40,370	492	40,370
Dagsavisen (d, R)	31	130	36,500	281	36,500
Tønsbergs Blad (d, R)	30	80	41,500	519	41,500
Budstikka (d, R)	30	79	39,250	497	39,250
Bergensavisen (d, R)	29	112	38,150	341	38,150
Bergensavisen Søndag (w, R)	29	94	38,150	406	38,150
Nordlys (d, R)	28	92	30,250	329	39,750
Hamar Arbeiderblad (d, R)	27	71	32,375	456	42,875
Varden (d, R)	27	80	45,200	565	45,200
Oppland Arbeiderblad (d, R)	27	81	29,750	367	39,500
Vårt Land (d, R)	27	100	33,875	339	39,875
Gudbrandsdølen Dagningen (d, R)	27	77	27,500	357	36,950
Finansavisen (d, R)	24	95	55,000	579	55,000
Finansavisen Lørdag (w, N)	24	91	55,000	604	55,000
Avisa Nordland (d, R)	24	69	29,546	428	33,998
Agderposten (d, R)	24	70	36,000	514	36,000
Fredriksstad Blad (d, R)	23	64	41,370	646	41,370
Trønder-Avisa (d, R)	23	73	23,720	325	30,670
Telemarksavisa (d, R)	22	69	36,660	531	36,660
Glåmdalen (d, R)	20	50	25,500	510	32,500
Østlendingen (d, R)	20	59	44,375	752	44,375
Morgenbladet (d, N)	19	75	22,400	299	28,000
Romsdals Budstikke (d, R)	18	48	30,000	625	30,000

NORWAY: NEWSPAPERS

**Newspapers cont.**

<b>d=daily w=weekly</b> <b>R=Regional N=National</b> <b>Title</b>	<b>Circulation</b> <b>(000s)</b>	<b>Adult</b> <b>readership</b> <b>(000s)</b>	<b>Full page</b> <b>B/W</b> <b>NKr</b>	<b>Adult CPT</b> <b>B/W</b> <b>NKr</b>	<b>Full page</b> <b>Colour</b> <b>NKr</b>
Nationen (d, R)	16	69	15,600	226	24,500
Sarpsborg Arbeiderblad (d, R)	15	45	30,514	678	41,329
Firda (d, R)	14	45	26,250	583	33,750
Rogalands Avis (d, R)	12	59	23,000	390	31,200
Klassekampen (d, N)	11	54	15,500	287	19,125
Nordstrands Blad (d, R)	7	56	40,110	716	40,110

Source: TNS Gallup Forbruker & Media 08/1

**Average CPT (B/W): NKr 240**

**Top ten newspaper  
advertisers (2007)**

<b>Advertiser</b>	<b>Newspaper expenditure</b> <b>NKr (mill)</b>
Thon Shopping	124.5
Rema 1000	115.7
Coop Obs!	102.3
Steen Bertel O.	95.5
Expert	94.5
Meny	92.9
Color Line Asa	91.8
Spar	86.0
Møller Bil	80.4
Toyota	79.8

Source: AC Nielsen Media Research

### Top ten newspaper product categories (2007)

Category	Newspaper expenditure NKr (mill)
Chains	2,454.1
Retail	1,554.2
Cars	1,047.1
Entertainment	979.8
Travel agencies	385.3
Transport	308.3
Telecommunications	292.5
Education	216.6
Banking/finance	210.5
Computers & software	204.2

Source: AC Nielsen Media Research

### Top ten newspaper owners (2007)

Owner	Newspaper revenue NKr (mill)
Verdens Gang	1,131.0
Aftenposten Morgen	795.2
Dagbladet	706.7
Bergens Tidende	652.2
Stavanger Aftenblad	438.7
Adresseavisen	429.2
Aftenposten Aften	362.0
Dagens Næringsliv	311.7
Fædrelandsvennen	265.4
Budstikka (Asker)	191.2

Source: AC Nielsen Media Research

# MAGAZINES

## Magazines

w=weekly m=monthly f=fortnightly bm=bimonthly	Circulation	Adult	Full page	Adult CPT
Title	(000s)	readership	Colour	Colour
		(000s)	NKr	NKr
<b>Women's</b>				
Se og Hør Tirsdag (w)	236	1075	95,000	88
Hjemmet (w)	207	766	79,500	104
Her og Nå (w)	179	683	44,300	65
Se og Hør Weekend (w)	176	666	55,000	83
Familien (f)	129	508	41,500	82
Norsk Ukeblad (w)	127	561	65,000	116
Vi over 60 (m)	90	383	36,700	96
Allers (w)	82	411	41,500	101
KK (w)	55	321	49,900	155
Det Nye (m)	53	318	58,900	185
Kamille (f)	46	190	42,200	222
I Form (f)	41	244	37,500	154
Henne (m)	39	215	53,000	247
D! (m)	39	153	27,500	180
C! (m)	37	140	19,900	142
Elle (m)	35	176	58,000	330
Bedre Helse (m)	32	170	25,700	151
Tara (m)	31	108	37,000	343
Tique (bm)	30	81	35,000	432
Costume (m)	29	56	49,000	875
Eva (m)	26	95	39,000	411
Shape-up (m)	23	115	24,900	217
Det gode liv (bm)	20	79	17,900	227
<b>Men's</b>				
Teknisk Ukeblad (w)	106	256	49,900	195
Vi menn (w)	97	584	59,500	102
Jake og Fiske (m)	87	326	31,000	95
Illustrert Vitenskap (m)	76	631	53,000	84
Norsk Golf (m)	76	135	41,000	304
FHM (m)	54	256	54,000	211
Bil (m)	52	320	40,500	127
Autofil (m)	34	222	44,000	198
Auto, Motor og Sport (m)	23	108	36,000	333
Jakt (m)	22	111	21,400	193
National Geographic (m)	17	236	36,000	153
Mann (m)	15	118	38,900	330
<b>Teenage</b>				
Topp (m)	44	123	32,000	260
Woman (m)	36	114	45,000	395
mag. (m)	36	114	31,500	276
Cosmpolitan (m)	29	114	38,000	333
Inside (m)	17	76	17,800	234
<b>Business</b>				
Dine Penger (m)	62	410	57,500	140
Kapital (bw)	40	286	57,900	202
Økonomisk Rapport (m)	19	132	30,500	231

Source: Mmims Norsk Medieindeks 2007.2

**Average CPT (Colour): NKr 151.8**

## NORWAY: MAGAZINES

### Top ten magazine advertisers (2007)

Advertiser	Magazine expenditure NKr (mill)
L'Oréal	60.8
Lilleborg	39.8
Hjemmet Mortensen	24.3
Boomi.No	18.4
Gilde Norge	17.9
Ostecompagniet	16.1
Axellus	15.8
Egmont Serieforlaget	14.8
Procter & Gamble	14.6
Allers Familie-Journal	13.4

Source: AC Nielsen Media Research

### Top ten magazine product categories (2007)

Category	Magazine expenditure NKr (mill)
Cosmetics	116.9
Pharmaceutical	116.5
Chains	87.2
Clothes/shoes	83.6
Telecommunications	76.4
Cars	63.8
Packaged food	61.4
Newspapers/magazines	53.3
Boats	39.5
Furniture/interiors	36.6

Source: AC Nielsen Media Research

### Top ten magazine owners (2007)

Owner	Magazine revenue NKr (mill)
Se Og Hør	122.9
Kk	97.3
Hjemmet	66.4
Norsk Ukeblad	58.3
Vi Menn	57.1
Henne	56.9
Elle	50.5
Det Nye	49.6
Her Og Nå	48.1
Kamille	48.0

Source: AC Nielsen Media Research

### Top magazine sales houses (2007)

Sales house	Magazine revenue NKr (mill)
Hjemmet Mortensen	567.7
Aller Gruppen	476.9
Others	196.9
MMK (Bonnier)	152.3
Moma	72.1

Source: AC Nielsen Media Research

# RADIO

## Number of commercial radio stations: 3

Source: ZenithOptimedia records

## Average daily listening minutes per adult: 97

Source: ZenithOptimedia records

## Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) NKr	Peak adult audience (000s)	30 sec peak adult CPT NKr
<b>National</b>					
P4	music/talk	0700-170	26,450	244	108
Kanal 24	music/talk	0700-170	5,783	54	107
<b>Main regional</b>					
Radio 1 Storby	music	0700-170	9,211	51	181

Source: ZenithOptimedia records

## Average CPT (all commercial stations): NKr 111.7

## Top ten radio advertisers (2007)

Advertiser	Radio expenditure NKr (mill)
Norgesgruppen Convenience	40.6
Statoil Detalj	34.5
Norsk Tipping	33.4
Verdens Gang	25.5
Spar	24.7
Joker	24.5
Yx Energi	23.3
Telenor Mobil	22.3
ICA	21.0
Tele2 Norge	19.1

Source: AC Nielsen Media Research



## NORWAY: RADIO

### Top ten radio product categories (2007)

Category	Radio expenditure NKr (mill)
Chains	165.0
Telecommunications	143.8
Gasoline/oil	61.2
Newspapers/magazines	60.2
Lottery	42.6
Cars	41.5
TV channels/radio stations	40.9
Fresh food	37.3
Banking/finance	34.7
Retail	30.9

Source: AC Nielsen Media Research

### Top radio owners (2007)

Owner	Radio revenue NKr (mill)
P4 Radio Hele Norge	796.9
Kanal 24	153.3
Sbs Radio Norge As	235.3
Nrj Norge	9.7

Source: AC Nielsen Media Research

# OUTDOOR

## Type, size and cost of sites

Type/size of display	Number of sites	Cost per panel per month (Nkr)
City Backlite	70	14,857
City Columns	100	16,800
Abribus/Eurosize	6,744	4,145
Pillars	675	4,150
Boards	2,211	4,350
Backlite	72	4,350
<b>Transport</b>		
Roof panels Metro	4,000	340
Roof panels bus	261	2,600
Roof panels Tram new	450	430
Roof panels Tram old	2,600	461
Interior Wall Panels Tram	5,000	232
Weekly posters bus	9,000	218
Megasides Bus	60	12,800
Queenside Bus	200	7,472
SuperBack Bus	1,310	15,550
Oslo Back Bus	100	2,400
Superside Tram new	60	5,100
Superside tram old	60	5,100
Quenside Tram	60	8,500
Metrobanner (200 kvm)	20	80,000
Metro Station domination	14	71,430
Entrance Impact (500 kvm)	8	83,333
Platformbanners(Valkyrien)	2	170,000
Shoppingmall banner (750 kvm)	30	50,670

Source: JC Decaux

## Top ten outdoor advertisers (2007)

Advertiser	Outdoor expenditure Nkr (mill)
Coca-Cola	28.8
Telenor Mobil	28.7
Tine Ba	23.1
Lilleborg	19.9
Rieber & Søn	18.9
Lindex	17.2
L'Oréal	15.7
TV Norge	14.9
Norwegian Air Shuttle	14.7
Aftenposten	14.4

Source: AC Nielsen Media Research

## Top ten outdoor product categories (2007)

Category	Outdoor expenditure NKr (gross)
Telecommunications	110.8
Soft drinks	54.8
Chains	52.4
Transport	48.2
Clothes/shoes	47.4
Newspapers/magazines	42.7
Packaged food/goods	41.1
Confectionery	41.0
Cars	38.0
Retail	35.7

Source: AC Nielsen Media Research

## Top outdoor contractors (2007)

Contractor	Outdoor revenue NKr (gross)
Clear Channel	547.4
JC Decaux	345.4
Cart Media	86.8

Source: AC Nielsen Media Research

# CINEMA

## Number of cinema screens: 662

Source: Capa Kinoreklame

## Number of screens used in typical National campaign: 204

Source: Capa Kinoreklame

## Trend in admissions

	Admissions (mill)	Gross takings NKr (000s)
2002	12.04	706,618
2003	13.05	815,305
2004	11.97	782,127
2005	11.31	783,549
2006	12.01	852,006
2007	10.82	791,190

Source: Film & Kino Årbok <http://www.filmweb.no/filmogkino/>

## Cinema audience profile

Age	%
16-24	31.4
25-34	22.6
35-49	28.2
50+	17.8
Sex	%
Male	51.6
Female	48.4
Personal income (NKr)	%
under 150,000	16.8
150,000-299,000	17.2
300,000-399,000	23.1
400,000+	24.1

Source: TNS Gallup - Forbruker & Media

## Top ten films (2007)

Film	Gross takings NKr (mill)
Harry Potter and the Order of the Phoenix	46.2
Pirates of the Caribbean: At World's End	46.9
Shrek 3	33.3
The Simpsons Movie	30.4
Ratatouille	25.7
Olsenbanden jr. Sølvgruvenes hemmelighet	18.3
Die Hard 4.0	24.4
Spider-man 3	21.5
Mr. Bean's Holiday	17.4
Elias og Kongeskipet	14.8

Source: Capa Kinoreklame

## Top ten cinema advertisers (2007)

Advertiser	Cinema expenditure NKr (mill)
Ringnes	9.8
Lilleborg	8.9
Norsk Tipping	6.6
Nidar	4.8
Coca-Cola	4.3
Rieber & Søn a	4.0
Stabburet	3.9
Kraft	3.5
Telenor Djuice	3.5
Nordisk Film Interaktiv	3.4

Source: AC Nielsen Media Research

**Top ten cinema product categories (2007)**

Category	Cinema expenditure NKr (mill)
Retail	30.1
Telecommunications	20.2
Soft drinks	19.2
Confectionery	11.8
Packaged food/goods	11.7
Chains	9.5
Sports/gaming	9.4
Education/courses	7.7
Lottery	6.7
Cosmetics	5.8

Source: AC Nielsen Media Research

**Top cinema owners (2007)**

Owner	Cinema revenue NKr (mill)
Capa Kinoreklame	187.4
Media Direct	27.0

Source: AC Nielsen Media Research

**INTERNET**

**Homes with internet connection: 1,726,100 (82%)**

**Adult internet users: 3,233,000 (87.1%)**

**Adult internet users with home broadband: 2,621,000 (70.6%)**

**Typical monthly cost of internet access: €40**

**Average minutes spent online per day (adults with internet access): 82**

Source: Mmims Norsk Medieindeks 2007/ZenithOptimedia records

NORWAY: INTERNET

**Cost of display ads**

Type	Typical cost per thousand NKr
Banner	150
Button	50
Dominans (ie all banners)	250

Source: TNS Gallup

**Internet user profile**

Age	%
16-24	16.4
25-34	19.4
35-54	40.1
55-64	14.8
65+	9.2
Sex	%
Male	52.4
Female	47.6
Status	%
AB	19.2
C1	13.2
C2	24.4
D	12.5
E	30.7

Source: Mmims Norsk Medieindeks 2007.2

**Top ten internet sites (2007)**

Site	Unique visitors per month (000s)
VG	2,900
msn	2,100
dagbladet	1,800
start siden	1,800
finn	1,630
nrk	1,380
gulesider	1,370
nettavisen	1,100
sol	1,000
aftenposten	960

Source: TNS Gallup

### Top search engines (2007)

Search engine
Google
Windows Live
Kvasir
Abssok
Sesam

Source: alexa.com

### Top ten internet advertisers (2007)

Advertiser	Internet expenditure NKr (mill)
Telenor	91.5
SAS	56.8
Hotels.com	53.2
Elprice	48.4
Netthandelen.no	36.3
Dell Computer	34.1
One.com	33.2
Eniro	32.6
Netcom	31.7
Voluntas Finans	28.9

Source: AC Nielsen Media Research

### Top ten internet product categories (2007)

Category	Internet expenditure NKr (mill)
Travel	283.7
Telecommunications	278.2
Banking/insurance	260.1
Electronics/data	209.6
Cars/boats/engines	107.5
Organisations	106.6
Food/soft drinks	86.0
Search engines	79.2
Music/films	73.1
Media	73.1

Source: AC Nielsen Media Research

### Top ten internet owners (2007)

Owner	Internet revenue NKr (mill)
vg.no	423.7
Aftenposten.no	347.1
msn.no	305.4
Dagbladet.no	280.9
Startsiden.no	255.2
nrk.no	145.6
Tv2.no/Nettavisen	114.1
Adlink.no	74.4
E24.no	70.3
Sol.no	60.2

Source: AC Nielsen Media Research

## MEDIA REACH

### % reach by medium (adults)

	Daily	Weekly
Conventional television	95.3	98.4
Newspapers	73.1	84.6
Magazines	25.7	54.9
Radio	80.1	87.9
Cinema	1.2	7.5
Internet	68.4	80.6

Source: Mmims Norsk Medieindeks 2007.2

## OVERALL

### Top ten overall advertisers (2007)

Advertiser	Media expenditure NKr (mill)
Lilleborg	307.8
Elkjøp	225.8
Norsk Tipping	210.0
Expert	209.4
L'Oréal	198.8
Spar	190.6
Telenor Mobil	189.4
Tele2 Norge	186.8
Rema 1000	183.5
Coop Obs!	183.2

Source: AC Nielsen Media Research

### Top ten overall product categories (2007)

Category	Media expenditure NKr (mill)
Chains	4,501.6
Retail	1,776.3
Cars	1,476.9
Telecommunications	1,299.3
Entertainment	1,147.2
Transport	548.4
Travel/travel agencies	517.4
Clothes/shoes	495.3
Banking/finance/insurance	483.8
Packaged food/goods	464.2

Source: AC Nielsen Media Research

### Top ten media owners (2007)

Owner	Media revenue NKr (mill)
TV 2	3,793.4
TVN	1,414.1
Verdens Gang	1,131.0
TV3	830.2
P4 Radio Hele Norge	796.9
Aftenposten Morgen	795.2
Dagbladet	706.7
Bergens Tidende	652.2
Clear Channel	547.4
Stavanger Aftenblad	438.7

Source: AC Nielsen Media Research



# PORTUGAL

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$ = 0.73 € at 2007 rate								
<b>Gross Domestic Product (€billion)</b>								
at current prices	122.3	129.3	135.4	138.6	144.1	149.1	155.3	162.9
% change	7.1	5.8	4.7	2.3	4.0	3.5	4.1	4.9
at 2007 prices	151.0	153.0	154.7	153.4	155.7	157.5	159.7	162.9
% change	4.1	1.3	1.2	-0.9	1.5	1.2	1.4	2.0
<b>Gross Domestic Product per capita (€000s)</b>								
at current prices	12.0	12.6	13.1	13.3	13.8	14.2	14.7	15.3
at 2007 prices	14.8	14.9	14.9	14.7	14.9	15.0	15.1	15.3
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	167.4	177.0	185.4	189.7	197.3	204.1	212.5	222.9
at 2007 prices	206.7	209.4	211.8	209.9	213.2	215.6	218.6	222.9
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	16.4	17.2	17.9	18.2	18.8	19.4	20.1	21.0
at 2007 prices	20.2	20.4	20.5	20.2	20.4	20.5	20.7	21.0
<b>Population</b>								
Millions	10.2	10.3	10.4	10.4	10.5	10.5	10.6	10.6
<b>Consumer Price Index</b>								
2007=100	81.0	84.5	87.5	90.4	92.6	94.7	97.2	100.0
% change	2.9	4.4	3.5	3.2	2.4	2.3	2.7	2.8
<b>Ad.spend as a % of GDP</b>								
	0.79	0.70	0.61	0.61	0.63	0.61	0.58	0.58
<b>Advertising Expenditure Growth (%)</b>								
at current prices	11.5	-6.2	-8.8	2.2	7.0	1.0	-1.1	3.6
at 2007 prices	8.3	-10.2	-11.9	-1.0	4.5	-1.2	-3.7	0.7

Source: IFS, ZenithOptimedia

# ADVERTISING EXPENDITURE

## Advertising expenditure in €million at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	606	56	110	330	46	-	64	-
1998	721	72	134	385	47	4	75	4
1999	870	92	170	455	58	5	86	4
2000	970	99	181	519	62	6	99	5
2001	909	89	160	484	61	7	103	5
2002	829	71	145	445	54	6	103	5
2003	847	69	145	464	54	7	105	4
2004	907	71	146	504	57	7	117	4
2005	916	70	148	517	56	7	114	5
2006	906	67	148	512	52	6	114	7
2007	939	67	150	533	51	6	120	13

## Advertising expenditure in €million at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	809	75	147	441	61	-	86	-
1998	937	94	174	501	61	6	97	5
1999	1,105	116	216	578	74	7	109	6
2000	1,198	122	223	641	76	7	122	6
2001	1,076	105	190	573	72	8	122	6
2002	947	81	166	508	62	7	117	5
2003	938	76	160	513	60	7	116	5
2004	980	77	158	545	61	7	127	5
2005	968	74	157	546	59	7	120	5
2006	932	69	152	527	53	6	118	7
2007	939	67	150	533	51	6	120	13

Source: ZenithOptimedia

- Notes:
1. After discounts
  2. Excludes production costs
  3. Includes agency commission
  4. Excludes classified advertising
  5. Internet includes all ad formats

### Main advertising restrictions

**Tobacco:** Banned.

**Alcohol:** Banned on TV and radio before 2230.

**Pharmaceutical:** OTC medicines may advertise freely, but prescription medicines may only advertise in trade titles.

**Children:** Children should only appear in ads that directly target children.

PORTUGAL: POPULATION

# POPULATION

Land area (km <sup>2</sup> )	91,951
Capital city	Lisbon
Language	Portuguese
Currency	Euro (€)

Source: CIA Factbook 2008

## Population by age

	Male (000s)	Female (000s)	Total (000s)
0-15	848	809	1,657
16-24	752	728	1,480
25-34	789	788	1,576
35-44	736	763	1,499
45-54	643	686	1,329
55-64	525	597	1,122
65+	708	985	1,693
Total	5,000	5,356	10,356

Source: INE - Censos 2001

## Adult (15+) status

	Male (000s)	Female (000s)	Total (000s)
AB	778	669	1,447
C1	1,067	1,003	2,071
C2	1,270	1,307	2,577
D	853	1,368	2,221
Total	3,968	4,347	8,315

Source: INE - Censos 2001

### Definition of adult status:

AB = top/middle management

C1 = skilled workers

C2 = unskilled workers

D = pensioners, unemployed, other unskilled workers

# TELEVISION

**Number of households: 3,505,292**

**Number of television households: 3,494,776 (99.7%)**

## Television homes with:

Colour	96.7%
VCR	53.2%
DVD	57.2%
Teletext	75.3%
Remote control	96.9%
Cable (pass)	73.1%
Cable (connection) - total	27.0%
Satellite dish (DTH) - total	6.1%

*Source: Establishment Survey 2nd wave 2007, Anacom*

**Average minutes viewed per day per adult: 216**

## Average pay-TV subscription cost (per month)

	Average subscription (€)
Cable (analogue)	23.30
Cable (digital)	28.30
DTH (analogue)	23.30
DTH (digital)	28.30
IPTV	34.21

*Source: Agency records*

## Main channels

Channel	Technical penetration (%)	Daily hours of transmission	Ad mins per week
<b>Non-commercial</b>			
RTP2	99.6	24	-
<b>Commercial</b>			
RTP1	99.7	24	2,019
SIC	99.7	24	2,678
TVI	99.5	24	2,735
<b>Cable</b>			
SIC Notícias	42.1	24	1,211
SIC Radical	37.6	24	720
MTV Portugal	35.6	24	813
Panda	35.2	20	936
AXN	34.6	24	1,038
SIC Mulher	34.2	24	652
Fox	20.3	24	536

*Source: Marktest Audimetria, Mediamonitor*

PORTUGAL: TELEVISION

**Cost/audience**

Channel	Peak time	Peak rate 30 sec (€)	Peak adult audience (000s)	30 sec peak adult CPT (€)
RTP1	2000-2030	12,906	1,122	11.5
SIC	2100-2130	13,104	919	14.3
TVI	2200-2230	20,571	1,219	16.9
SIC Notícias	2330-2400	2,237	68	33.0
SIC Radical	2330-2400	848	16	53.7
MTV Portugal	1330-1400	778	7	105.1
Panda	2000-2030	1,581	28	56.7
AXN	2200-2230	2,045	72	28.3
SIC Mulher	2230-2300	998	20	49.1
Fox	2230-2300	998	35	28.7

Source: Marktest Audimetria, Mediamonitor

**Average CPT (all commercial channels): €20.6**

**Share of viewing & ad revenue**

Channel	Share of viewing (%)		Ad revenue
	2007 Individuals	2007 Adults	2007 €(000s)
RTP2	5.2	4.8	2,127
RTP1	25.2	26.7	421,227
SIC	25.1	25.2	970,078
TVI	29.0	28.4	1,379,080
Cable	14.4	14.1	313,268

Source: Marktest Audimetria, Mediamonitor (rate card cost)

**Top ten television programmes (2007)**

Programme	Channel	Adult TVR
Champions League - Chelsea v FC Porto	RTP1	27.8
Champions League - FC Porto v Chelsea	RTP1	27.6
Euro2008 Qualifying Match - Portugal v Finland	RTP1	27.4
Euro2008 Qualifying Match - Serbia v Portugal	RTP1	25.2
National Team Private Match - Brazil v Portugal	RTP1	25.1
UEFA Cup Quarter Finals - Benfica v Espanyol	RTP1	24.7
BWIN Liga - Beira-Mar v Benfica	TVI	24.4
UEFA Cup Round of 16 - PSG v Benfica	RTP1	24.3
Euro2008 Qualifying Match - Portugal v Belgium	RTP1	24.0
Euro2008 Qualifying Match - Portugal v Serbia	RTP1	24.0

Source: Marktest Audimetria

PORTUGAL: TELEVISION

**Top ten television  
advertisers (2007)**

Advertiser	TV expenditure €(000s)
L'Oréal	122,177
Procter & Gamble	115,850
Unilever	114,849
Modelo Continente	103,818
Reckitt Benckiser	97,231
TMN	79,541
Vodafone	73,942
Danone	71,666
Optimus	63,340
Unicer	54,944

Source: Mediamonitor (rate card cost)

**Top ten television product  
categories (2007)**

Category	TV expenditure €(000s)
Food	455,184
Personal care	410,608
Communication	300,151
Banks/finance	277,264
Commerce	271,836
Beverages	240,765
Auto	232,106
Home care	171,420
Pharmaceuticals	102,562
Personal services	82,421

Source: Mediamonitor (rate card cost)

**Top television  
owners (2007)**

Owner	TV revenue €(000s)
TVI	1,379,080
SIC	970,078
RTP	423,354
TV Cabo	313,268

Source: Mediamonitor (rate card cost)

# NEWSPAPERS

## Newspapers

Title	Circulation (000s)	Adult readership (000s)	Full page Adult CPT		Full page Colour €
			B/W €	B/W €	
<b>d=daily w=weekly</b>					
<b>National dailies</b>					
Correio da Manhã	115	997	7,620	7.6	11,430
Jornal de Notícias	92	971	8,880	9.1	12,432
Record	74	686	5,530	8.1	8,300
Público	42	374	6,375	17.0	7,500
Diário de Notícias	36	321	6,900	21.5	9,660
24 Horas	36	247	4,284	17.3	5,998
O Jogo	34	446	2,915	6.5	4,050
Diário Económico	12	169	4,510	26.7	5,890
Jornal de Negócios	8	136	3,135	23.1	4,700
A Bola	-	710	5,470	7.7	8,350
<b>National weeklies</b>					
Expresso	118	624	16,913	27.1	22,550
Sol	49	233	6,500	27.9	8,450
Ocasião	21	127	1,728	13.6	2,074
Auto Sport	12	112	-	-	3,100
Semanário Económico	9	123	4,510	36.7	5,890
<b>Free distribution</b>					
Jornal da Região (w)	210	102	6,487	63.6	7,984
Metro (d)	176	668	7,500	11.2	11,000
Destak (d)	172	647	7,665	11.8	10,950
<b>Supplements</b>					
Economia (Expresso, w)	118	379	16,163	42.6	21,550
Emprego (Expresso, w)	118	313	3,427	10.9	5,712
Espaços & Casas (Expresso, w)	118	290	2,982	10.3	4,970
Confidencial (Sol, w)	49	110	5,200	47.3	6,500
Inimigo Público (Público, w)	-	326	2,465	7.6	2,900
Ipsilon (Público, w)	-	249	3,528	14.2	4,150
JN Negócios (JN, w)	-	380	8,580	22.6	12,012
Público Digital (Público, d)	-	203	2,933	14.4	3,450
<b>Sunday magazines (supplements)</b>					
Actual (Expresso)	118	406	2,970	7.3	3,960
Única (Expresso)	118	455	-	-	7,650
Essencial (Sol)	49	115	1,200	10.4	1,500
Tabu (Sol)	49	137	-	-	3,950
CM Domingo (CM)	-	689	-	-	4,750
Fugas (Público)	-	243	2,975	12.2	3,500
Notícias Magazine (DN/JN)	-	924	-	-	8,650
Pública (Público)	-	362	-	-	5,500

Source: Bareme Press Apr-Dec 2007 (Marktest), APCT (average paid circ.) 2007

**Average CPT (B/W): €15.0**

PORTUGAL: NEWSPAPERS

**Top ten newspaper advertisers (2007)**

Newspaper expenditure	
Advertiser	€(000s)
Grupo Banco Espírito Santo	8,466
Grupo Caixa Geral de Depósitos	8,104
Cofidis	7,159
Grupo Banco Comercial Português	7,108
SIVA	5,877
Santa Casa da Mis. de Lisboa	5,095
TMN	5,050
Vodafone	4,314
El Corte Ingles	4,035
Grupo Santander Totta	3,429

Source: Mediamonitor (rate card cost)

**Top ten newspaper product categories (2007)**

Newspaper expenditure	
Category	€(000s)
Banks/finance	54,788
Culture/recreation	51,577
Auto	40,110
Community services	24,361
Communication	20,346
Commerce	19,253
Real estate	14,051
Tourism	12,560
IT	10,705
Personal services	8,885

Source: Mediamonitor (rate card cost)

**Top ten newspaper owners (2007)**

Newspaper revenue	
Owner	€(000s)
Global Notícias Publicações	127,704
Presselivre Imprensa Livre	64,913
Sojornal Sociedade Jorn. e Edi.	62,539
Metro News Publicações	34,804
Público Comunicação Social	34,736
Transjornal - Edições de Pub.	30,178
ST & SF Sociedade de Pub.	25,423
A Tipografica Das Beiras	21,167
Diaveiro Emp. do Diário de Aveiro	15,525
Edisport Soc. Pub. Desportivas	15,065

Source: Mediamonitor (rate card cost)

**Top ten newspaper sales houses (2007)**

Newspaper revenue	
Sales house	€(000s)
Controlinveste	127,704
Grupo Impresa	66,699
Cofina	66,470
Metro News Publicações	34,804
Público Comunicação Social	34,736
Transjornal - Edições de Pub.	30,178
ST & SF Sociedade de Pub.	25,423
A Tipografica Das Beiras	21,167
Diaveiro Emp. do Diário de Aveiro	15,525
Edisport Soc. Pub. Desportivas	15,065

Source: Mediamonitor (rate card cost)



# MAGAZINES

## Magazines

<b>w=weekly m=monthly bm=bi-monthly f=fortnightly</b>		<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>
<b>Title</b>	<b>Circulation (000s)</b>	<b>readership (000s)</b>	<b>Colour €</b>	<b>Colour €</b>
<b>Science/environment</b>				
National Geographic (m)	55	390	6,000	15.4
<b>Cooking</b>				
Mulher Moderna na Cozinha (m)	40	211	3,000	14.2
Teleculinária (w)	19	184	1,500	8.2
Segredos de Cozinha (w)	18	144	1,700	11.8
Saberes e Sabores (m)	9	164	2,200	13.4
Cozinha Saudável (m)	-	111	2,100	18.9
<b>Culture/shows</b>				
Blitz (m)	16	75	2,570	34.3
<b>Architecture, decoration &amp; gardening</b>				
Casa Dez (m)	24	75	2,995	39.9
Caras Decoração (m)	19	184	4,300	23.4
Casa Cláudia (m)	17	129	4,200	32.6
Casas de Portugal (bm)	15	121	2,900	24.0
Casa & Jardim (m)	15	95	4,100	43.2
Máxima Interiores (m)	14	91	4,100	45.1
Arquitectura & Construção (bm)	11	137	4,000	29.2
<b>Sports/automotive</b>				
Revista do ACP (m)	163	325	5,800	17.8
Guia do Automóvel (m)	27	178	2,415	13.6
AutoMotor (m)	22	204	5,100	25.0
Turbo (m)	18	205	4,750	23.2
Auto Hoje (w)	18	155	3,415	22.0
Auto Magazine (m)	13	78	4,990	64.0
Bike Magazine (m)	10	52	2,420	46.5
Maxi Tuning (m)	9	82	3,025	36.9
Motociclismo (m)	9	82	2,890	35.2
<b>Economics, business &amp; management</b>				
Exame (m)	26	190	4,810	25.3
Negócios & Franchising (bm)	14	70	2,266	32.4
<b>Teenager's</b>				
Bravo (f)	56	50	3,685	73.7
Super Pop (f)	38	53	3,400	64.2
100% Jovem (m)	23	40	2,800	70.0
Fórum Estudante (m)	-	62	3,600	58.1
<b>IT</b>				
Exame Informática (m)	34	211	3,700	17.5
PC-Guia (m)	24	278	3,400	12.2
Bit (m)	6	74	3,500	47.3

PORTUGAL: MAGAZINES

**Magazines cont.**

w=weekly m=monthly bm=bi-monthly f=fortnightly		Adult	Full page	Adult CPT
Title	Circulation (000s)	readership (000s)	Colour €	Colour €
<b>Women's/fashion</b>				
Maria (w)	243	556	4,600	8.3
Telenovelas (w)	95	220	1,980	9.0
Happy Woman (m)	84	61	4,800	78.7
Activa (m)	75	204	5,650	27.7
Ana (w)	66	171	2,100	12.3
Máxima (m)	59	218	6,000	27.5
Lux Woman (m)	52	188	5,510	29.3
Elle (m)	50	89	6,750	75.8
Cosmopolitan (m)	49	147	5,800	39.5
Ragazza (m)	33	88	5,050	57.4
Vogue (m)	31	98	6,000	61.2
Mulher Moderna (w)	14	96	2,250	23.4
<b>General interest</b>				
Unibanco (bm)	102	117	5,020	42.9
Visão (w)	100	650	6,750	10.4
Seleções Reader's Digest (m)	94	303	5,500	18.2
Sábado (w)	65	245	6,100	24.9
Super Interessante (m)	39	258	4,100	15.9
Focus (w)	15	131	4,750	36.3
Courrier Internacional (m)	8	37	3,280	88.6
Família Cristã (m)	-	80	1,400	17.5
<b>Men's</b>				
Maxmen (m)	55	340	5,250	15.4
FHM (m)	47	278	5,050	18.2
Men's Health (m)	27	94	3,600	38.3
<b>Health &amp; education</b>				
Saber Viver (m)	51	143	4,350	30.4
Pais & Filhos (m)	28	154	5,555	36.1
Crescer (m)	7	54	3,900	72.2
Farmácia Saúde (m)	-	279	4,400	15.8
Medicina e Saúde (m)	-	130	3,250	25.0
Saúde e Bem Estar (m)	-	189	2,600	13.8
<b>"Fait divers"</b>				
Nova Gente (w)	144	529	5,600	10.6
Caras (w)	91	518	5,450	10.5
Lux (w)	67	292	4,380	15.0
Flash (w)	50	127	4,300	33.9
Vip (w)	35	170	3,750	22.1
<b>TV &amp; games</b>				
TV 7 Dias (w)	164	546	3,990	7.3
TV Guia (w)	70	411	4,270	10.4
TV Mais (w)	66	288	3,040	10.6

PORTUGAL: **MAGAZINES**

**Magazines cont.**

<b>w=weekly m=monthly bm=bi-monthly f=fortnightly</b>		<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>
<b>Title</b>	<b>Circulation</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>
	<b>(000s)</b>	<b>(000s)</b>	<b>€</b>	<b>€</b>
<b>Travel &amp; leisure</b>				
Tempo Livre (m)	173	248	3,700	14.9
Volta ao Mundo (m)	20	149	5,160	34.6
Rotas e Destinos (m)	13	208	4,250	20.4
Evasões (m)	8	109	4,380	40.2
<b>Children's</b>				
Tio Patinhas (m)	-	75	1,262	16.8
<b>Handwork</b>				
Bgamer (m)	14	64	5,700	89.1
Linhas & Pontos (m)	8	118	3,300	28.0
Arteldeias - Um mundo em trabalhos (m)	-	101	3,240	32.1
Bricolage & Decoração (m)	-	104	3,240	31.2
Ponto Cruz e Novidades (m)	-	108	2,240	20.7

Source: Bareme Press Apr-Dec 2007 (Marktest), APCT (average paid circ.) 2007

**Average CPT (Colour): €22.0**

PORTUGAL: MAGAZINES

**Top ten magazine advertisers (2007)**

Advertiser	Magazine expenditure €(000s)
L'Oréal	14,353
Cofidis	7,897
Tempus International	5,535
Banco Cetelem	4,404
SIVA	2,840
Socosmet	2,833
Procter & Gamble	2,720
Unilever	2,616
Beiersdorf	2,553
Jamba	2,252

Source: Mediamonitor (rate card cost)

**Top ten magazine product categories (2007)**

Category	Magazine expenditure €(000s)
Personal care	36,109
Auto	23,950
Banks/finance	23,447
Textiles	15,292
Jewellery, watches & medals	15,151
Culture/recreation	13,922
Pharmaceuticals	11,507
Personal services	11,181
Food	9,995
Communication	9,842

Source: Mediamonitor (rate card cost)

**Top ten magazine owners (2007)**

Owner	Magazine revenue €(000s)
Edimpresa Editora	78,487
Impala Sociedade Editorial	59,137
Edirevistas Sociedade Editorial	24,049
Media Capital Edições	20,243
Presselivre Imprensa Livre	15,018
Motorpress Lisboa	14,421
TVG Editora de Pub. e Multimédia	11,377
Hachette Filipacchi Publicações	7,235
Goody	5,636
Global Notícias Publicações	4,068

Source: Mediamonitor (rate card cost)

**Top ten magazine sales houses (2007)**

Sales house	Magazine revenue €(000s)
Grupo Impresa	79,249
Impala	59,137
Cofina	50,444
Media Capital	20,243
Motorpress	15,268
Hachette Filipacchi/RBA	8,254
Goody	5,636
Controlinveste	4,068
Entusiasmo Media	3,682
Baleska Press	3,472

Source: Mediamonitor (rate card cost)

# RADIO

**Number of radio households: 3,331,000 (95.0%)**

*Source: Consumer 2006 (Marktest)*

**Number of commercial radio stations: 3 national, 2 regional & 347 local**

*Source: GMCS*

**Average daily listening minutes per adult: 197**

*Source: Bareme Radio 2nd Sem. 2007 (Ind. 15+)*

## Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) €	Peak adult audience (000s)	30 sec peak adult CPT €
<b><i>National</i></b>					
RFM	music	0800-0900	1,372	339	4.0
R. Renascença Canal 1	news	0800-0900	672	243	2.8
R. Comercial	music	0900-1000	581	166	3.5
<b><i>Main regional</i></b>					
TSF	news	0800-0900	1,014	96	10.6
Cidade FM	music	1800-1900	365	76	4.8
Mega FM	music	0800-0900	140	35	4.0
R. Clube Português	news	0800-0900	344	25	13.8
Best Rock FM	music	1100-1200	135	13	10.4

*Source: Bareme Radio 2nd Sem. 2007 (Ind. 15+)*

**Average CPT (all commercial stations): €3.4**

PORTUGAL: RADIO

**Top ten radio  
advertisers (2007)**

Advertiser	Radio expenditure €(000s)
Grupo Banco Espírito Santo	10,234
Banco Português de Investimento	5,848
Global Notícias Publicações	5,242
Portugal Telecom	5,161
Modelo Continente	4,917
Santa Casa da Mis. de Lisboa	4,716
Grupo Santander Totta Sa	4,411
TMN	4,164
Renault Portuguesa	3,817
Grupo Banco Comercial Português	3,218

Source: Mediamonitor (rate card cost)

**Top ten radio product  
categories (2007)**

Category	Radio expenditure €(000s)
Banks/finance	37,503
Auto	29,021
Commerce	15,573
Culture/recreation	15,392
Communication	15,224
Paper/publishing	12,616
Personal services	6,590
IT	6,410
Community services	5,917
Domestic appliances & other	5,114

Source: Mediamonitor (rate card cost)

**Top radio  
owners (2007)**

Owner	Radio revenue €(000s)
<b>Media Capital</b>	<b>65,402</b>
RC	40,932
Cidade FM	13,364
RCP	11,106
<b>Grupo Renascenca</b>	<b>62,602</b>
RFM	46,124
RR	14,056
Mega FM	2,422
<b>Controlinveste</b>	<b>55,454</b>
TSF	55,454

Source: Mediamonitor (rate card cost)

**Top radio  
sales houses (2007)**

Sales house	Radio revenue €(000s)
Media Capital Rádios	65,402
Intervoz + Mega FM	62,602
Controlinveste	55,454

Source: Mediamonitor (rate card cost)

# OUTDOOR

**Number of outdoor sites: 104,203**

## Type, size and cost of sites

Size of display (cm)	Number of sites	Cost per panel per month (€)
400 x 300	100	640
800 x 300	2,140	1,996
120 x 176	28,893	336
313 x 230	1,618	660
Others	71,452	-

Source: Agency records

## Top ten outdoor advertisers (2007)

Advertiser	Outdoor expenditure €(000s)
Unilever	11,943
Unicer	9,551
Tempus Internacional	7,010
Vodafone	6,651
Central De Cervejas	6,065
Ford Lusitana	5,470
TMN	5,283
Santa Casa da Mis. de Lisboa	5,257
Coca-Cola	4,989
El Corte Ingles	4,439

Source: Mediamonitor (rate card cost)

## Top ten outdoor product categories (2007)

Category	Outdoor expenditure €(000s)
Auto	39,981
Beverages	35,215
Community services	24,158
Commerce	21,302
Food	20,081
Banks/finance	16,349
Culture/recreation	15,822
Personal care	14,938
Paper/publishing	12,200
Textiles	10,096

Source: Mediamonitor (rate card cost)

## Top ten outdoor contractors (2007)

Contractor	Outdoor revenue €(000s)
JCDecaux	130,487
MOP	62,089
Cemusa	61,606
Spectacolor	10,940
Grande Ecran	5,237
Apsmedia	4,737
Dot One Media	3,111
Fc&F	2,416
Painel	1,581
New Impact	1,060

Source: Mediamonitor (rate card cost)

# CINEMA

**Number of cinema screens: 546**

*Source: ICA*

**Average cost of a 60 sec. spot per screen per week: €154.70**

*Source: Screenvision*

**Average CPT of a 30 sec. spot: €35.10**

**Number of screens used in typical national campaign: 244**

*Source: Screenvision*

## Trend in admissions

	Admissions (mill)	Gross takings €(000s)
2002	19.5	73,214
2003	19.0	74,079
2004	18.7	75,900
2005	15.7	66,337
2006	16.4	68,321
2007	16.3	69,121

*Source: ICA*

## Cinema audience profile

<b>Age</b>	<b>%</b>
15-17	10.3
18-24	28.4
25-34	30.2
35-44	15.4
45-54	9.2
54+	6.5
<b>Sex</b>	<b>%</b>
Male	49.3
Female	50.7
<b>Class</b>	<b>%</b>
A	11.1
B	18.5
C1	31.4
C2	28.0
D	11.0

*Source: Bareme Cinema 2007*



PORTUGAL: CINEMA

**Top ten films (2007)**

<b>Film</b>	<b>Gross takings €(000s)</b>
Shrek the Third	3,465
Ratatouille	2,793
Pirates of the Caribbean: At World's End	2,188
Mr. Bean's Holiday	2,058
Harry Potter and the Order of the Phoenix	2,033
Spider-Man 3	1,713
Bee Movie	1,680
The Simpsons Movie	1,457
Blood Diamond	1,404
Ocean's Thirteen	1,282

Source: ICA

**Top ten cinema  
advertisers (2007)**

<b>Advertiser</b>	<b>Cinema expenditure €(000s)</b>
Unicer	2,945
Portugal Telecom	2,343
Montepio Geral	1,471
Pepsi-Cola International	1,170
Sumolis - Gestão de Marcas	921
Ministério da Saúde	893
Inst. Português da Juventude	757
EDP - Electricidade de Portugal	661
TV Cabo	573
TMN	558

Source: Mediamonitor (rate card cost)

**Top ten cinema  
product categories (2007)**

<b>Category</b>	<b>Cinema expenditure €(000s)</b>
Beverages	5,365
Communication	3,258
Community services	2,403
Culture/recreation	2,331
Banks/finance	2,011
Auto	1,247
Food	1,247
Electricity, gas & water	661
IT	621
Media	447

Source: Mediamonitor (rate card cost)

**Top cinema  
owners (2007)**

<b>Owner</b>	<b>Cinema revenue €(000s)</b>
Screenvision	16,930
+ Cinema	5,046

Source: Mediamonitor (rate card cost)

# INTERNET

**Homes with internet connection: 1,563,360 (44.6%)**

**Adult internet users: 3,873,117 (46.6%)**

**Households with broadband access: 904,365 (25.8%)**

**Typical monthly cost of internet access: €39.57**

**Average minutes spent online at home per day  
(ind. 4+ with internet access): 22.2**

## Cost of display ads

Type	Cost per month €
MPU (300 x 250)	60-100
Leaderboard (728 x 90)	40-60
Video ad (300 x 250)	60-100
Layer	100-150
Banner (468 x 60)	40-60
Expandable MPU	120-160
Interstitial	150-160
Half banner (234 x 60)	12-25

Source: Agency records

## Internet user profile

Age	%
15-17	9.1
18-24	23.7
25-34	29.2
35-44	18.1
45-54	12.6
55-64	5.9
64+	1.4
Sex	%
Male	56.7
Female	43.3
Class	%
A	11.1
B	20.3
C1	31.4
C2	26.1
D	11.1

Source: Bareme Internet 2007

## Top ten internet sites (2007)

Site	Unique visitors per month (000s)
google.pt	2,642
google.com	2,250
login.live.com	2,240
youtube.com	2,041
hi5.com	1,973
pt.wikipedia.org	1,680
sapo.pt	1,635
images.google.pt	1,614
microsoft.com	1,575
msn.com	1,343

Source: Marktest Netpanel 3rd Q 2007

## MEDIA REACH

### % reach by medium (adults)

	Daily	Weekly	Monthly
Conventional television	83.2	98.4	99.7
Newspapers	43.2	30.3	-
Magazines	-	33.0	38.6
Radio	54.6	-	-
Outdoor	-	-	-
Cinema	-	6.5	19.6
Internet	33.5	-	43.2

Source: Marktest Audimetria, Mediamonitor, Bareme Cinema 2007, Bareme Internet 2007

## OVERALL

### Top ten overall advertisers (2007)

Advertiser	Media expenditure €(000s)
L'Oréal	139,880
Unilever	132,489
Procter & Gamble	121,663
Modelo Continente	116,204
Reckitt Benckiser	98,276
TMN	95,912
Vodafone	90,471
Optimus	73,893
Danone	73,460
Unicer	70,220

Source: Mediamonitor (rate card cost)

### Top ten media owners (2007)

Owner	Media revenue €(000s)
TVI	1,379,080
SIC	970,078
RTP	423,354
TV Cabo	313,268
Global Notícias Publicações	131,772
JCDecaux	130,487
Presselivre Imprensa Livre	79,931
Edimpresa Editora	78,705
Media Capital Rádios	65,402
Grupo Renascença	62,602

Source: Mediamonitor (rate card cost)

### Top ten overall product categories (2007)

Category	Media expenditure €(000s)
Food	498,366
Personal care	467,999
Banks/finance	411,363
Community services	372,978
Auto	366,416
Commerce	337,705
Beverages	300,051
Home care	176,621
Culture/recreation	163,037
Pharmaceuticals	128,832

Source: Mediamonitor (rate card cost)

### Top ten sales houses (2007)

Sales house	Media revenue €(000s)
Media Capital	1,465,599
Grupo Impresa	1,116,026
Grupo RTP	423,354
TV Cabo	313,268
Controlinveste	187,226
JCDecaux	130,487
Cofina	116,914
Grupo Renascença	62,602
MOP	62,089
Cemusa	61,606

Source: Mediamonitor (rate card cost)

# SPAIN

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$ = 0.73 € at 2007 rate								
<b>Gross Domestic Product (€billion)</b>								
at current prices	630	681	729	783	841	908	981	1,050
% change	8.6	8.1	7.0	7.4	7.4	8.0	8.0	7.0
at 2007 prices	786	820	851	887	925	966	1,008	1,050
% change	5.0	4.3	3.9	4.2	4.2	4.5	4.4	4.1
<b>Gross Domestic Product per capita (€000s)</b>								
at current prices	15.7	16.7	17.6	18.6	19.6	20.9	22.4	23.7
at 2007 prices	19.5	20.1	20.6	21.1	21.6	22.3	23.0	23.7
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	862	932	997	1,071	1,150	1,242	1,342	1,436
at 2007 prices	1,075	1,121	1,165	1,214	1,265	1,322	1,380	1,436
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	21.4	22.9	24.1	25.4	26.9	28.6	30.6	32.4
at 2007 prices	26.7	27.5	28.1	28.8	29.6	30.5	31.4	32.4
<b>Population</b>								
Millions	40.2	40.7	41.4	42.1	42.8	43.4	43.9	44.3
<b>Consumer Price Index</b>								
2007=100	80.2	83.1	85.6	88.2	90.9	94.0	97.3	100.0
% change	3.4	3.6	3.1	3.0	3.1	3.4	3.5	2.8
<b>Ad.spend as a % of GDP</b>								
	0.88	0.79	0.73	0.70	0.72	0.73	0.73	0.75
<b>Advertising Expenditure Growth (%)</b>								
at current prices	9.8	-3.3	-0.8	2.8	10.5	9.3	8.2	9.9
at 2007 prices	6.1	-6.7	-3.7	-0.2	7.2	5.7	4.5	6.9

Source: IFS, ZenithOptimedia

# ADVERTISING EXPENDITURE

## Advertising expenditure in €million at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	3,887	1,314	499	1,488	377	32	178	-
1998	4,340	1,431	527	1,731	411	38	198	5
1999	5,046	1,530	675	2,100	466	42	217	15
2000	5,539	1,692	618	2,311	502	55	308	53
2001	5,357	1,594	620	2,151	490	45	407	52
2002	5,316	1,531	590	2,185	485	45	409	72
2003	5,467	1,496	601	2,317	508	48	422	75
2004	6,042	1,584	664	2,676	540	41	442	94
2005	6,601	1,666	675	2,951	610	43	494	162
2006	7,142	1,791	649	3,184	637	42	529	310
2007	7,849	1,894	722	3,467	678	38	568	482

## Advertising expenditure in €million at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	5,225	1,766	670	1,999	506	43	240	-
1998	5,728	1,888	695	2,284	543	50	261	7
1999	6,509	1,974	871	2,709	601	55	280	19
2000	6,907	2,110	771	2,881	626	69	384	67
2001	6,448	1,918	746	2,589	589	54	489	62
2002	6,209	1,788	689	2,552	566	53	477	84
2003	6,197	1,696	681	2,626	576	54	479	85
2004	6,644	1,741	730	2,943	594	45	486	104
2005	7,023	1,773	718	3,140	649	46	526	172
2006	7,342	1,841	667	3,274	655	43	544	319
2007	7,849	1,894	722	3,467	678	38	568	482

Source: Duplo, Nielsen, Infoadex

Notes: 1. After discounts

2. Excludes agency commission

3. Excludes production costs

4. Excludes classified advertising

5. Magazines excludes directories but includes newspaper supplements

### Main advertising restrictions

**Tobacco:** Banned on TV.

**Alcohol:** Only drinks with less than 20% alcohol may advertise on TV.

**Pharmaceutical:** Prescription medicines may not advertise.

# POPULATION

<b>Land area (km<sup>2</sup>)</b>	499,542
<b>Capital city</b>	Madrid
<b>Language</b>	Spanish
<b>Currency</b>	Euro (€)

Source: CIA Factbook 2008

## Population by age

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
0-15	3,635	3,432	7,067
16-24	2,422	2,304	4,726
25-34	4,055	3,778	7,833
35-44	3,915	3,714	7,629
45-54	3,112	3,104	6,216
55-64	2,418	2,535	4,953
65+	3,238	4,395	7,633
<b>Total</b>	<b>22,795</b>	<b>23,262</b>	<b>46,057</b>

Source: INE (2007)

## Adult status

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
AB	1,921	1,723	2,656
C1	3,003	2,904	5,071
C2	8,005	7,805	15,599
D	4,566	5,424	11,571
E	1,210	1,700	3,014
<b>Total</b>	<b>18,705</b>	<b>19,556</b>	<b>37,911</b>

Source: EGM 2º Año Movil 2008

### Definition of adult status:

- AB = highest educational and professional levels
- C1 = high educational level and medium professional level
- C2 = medium educational and professional levels
- D = low educational level and medium professional level
- E = low educational and professional levels

# TELEVISION

**Number of households: 16,122,000**

**Number of television households: 16,048,000 (99.5%)**

## Television homes with:

Colour	99.5%
VCR	47.1%
DVD	71.8%
Multiset	64.1%
Teletext	83.8%
Cable (connection) - total	11.5%
Satellite dish (DTH) - total	20.2%
Digital satellite dish	10.2%
Digital terrestrial television (DTT)	30.7%
IPTV	3.0%

Source: EGM Hogares, 2º Acumulado 2008

**Average minutes viewed per day per adult: 222**

**Average pay-TV subscription cost (per month)**

	Average subscription (€)
Cable	28.0
DTH	21.0
IPTV	19.9

Source: Agency records

## Main channels (national)

Channel	Technical penetration (%)	Daily hours of transmission	Ad mins per week
<b>Commercial</b>			
TVE1	99.7	24	1,562
La 2	99.5	24	1,320
Tele 5	99.6	24	1,643
Antena 3	99.6	24	1,661
Cuatro	99.3	24	1,616
La Sexta	88.4	24	1,277

Source: TNS

SPAIN: TELEVISION

**Main channels (regional)**

Channel	Technical penetration (%)	Daily hours of transmission	Ad mins per week
<b>Commercial</b>			
TVM	17.3	24	1,101
TVCAN	4.5	24	932
C9	16.8	24	923
ETB2	7.1	24	871
C.SUR	18.9	24	790
TVG	6.3	24	745
TV3	24.6	24	742
CMT	7.7	24	740
PUNT2	12.6	24	418
ATV	3.2	24	374
ETB1	6.8	24	343
K3-33	21.1	24	305
C2A	18.0	24	273
7RM	3.2	24	213
TPA	2.2	24	192
IB3	4.4	24	183

Source: TNS

**Cost/audience**

Channel	Peak time	Peak rate 30 sec €	Peak adult audience (000s)	30 sec peak adult CPT €
Tele 5	2230-2300	38,250	4,295	8.9
Antena 3	2300-2330	25,200	3,461	7.3
Cuatro	2300-2330	22,500	3,260	6.9
TVE1	2130-2200	22,950	2,788	8.2
La 2	1530-1600	5,400	1,437	3.8
La Sexta	1600-1630	5,140	1,209	4.3
TV3	2200-2230	16,650	803	20.7
C.SUR	2300-2330	6,990	693	10.1
C9	2230-2300	5,400	361	15.0
TVM	1430-1500	7,650	326	23.5
C2A	2300-2330	-	299	-
TVG	1430-1500	3,300	243	13.6
ETB2	2300-2330	4,290	203	21.1
CMT	2300-2330	1,280	139	9.2
TVCAN	2330-2400	1,450	109	13.3
K3-33	1830-1900	-	93	-
ETB1	2230-2300	3,230	62	52.1
PUNT2	2230-2300	5,400	24	225.0

Source: TNS

**Average CPT (all commercial channels): €9.0**



## SPAIN: TELEVISION

### Share of viewing & ad revenue

Channel	Share of viewing (%)		Ad revenue
	Individuals	Adults	2007 €(mill)
<b>Commercial</b>			
Tele 5	20.3	20.9	1,038
Antena 3	17.4	17.0	835
TVE1	17.2	17.8	713
Total regional	15.0	15.1	355
Thematic	11.0	10.3	60
Cuatro	7.7	7.6	282
La 2	4.6	4.6	140
La Sexta	4.0	3.9	133
Local TV	2.6	2.7	51
Others	0.1	0.1	-

Source: TNS, Infoadex (estimate)

### Top ten television programmes (2007)

Programme	Channel	Adult TVR
Football: UEFA Cup	Antena 3	20.6
Formula 1: GP Brasil	Tele 5	20.1
Football: Champions League	Antena 3	13.3
Football: Clasificación Eurocopa	TVE1	12.8
Tengo una pregunta para Usted	TVE1	8.9
CSI	Tele 5	8.1
Aida	Tele 5	7.8
Cuentame como Paso	TVE1	6.3
Football: Liga Española	La Sexta	5.8
Cine	Antena 3	3.1

Source: TNS

## SPAIN: TELEVISION

### Top ten television advertisers (2007)

Advertiser	TV expenditure €(mill)
Procter & Gamble	119.4
Telefónica	111.4
L'Oreal	88.9
Danone	64.6
Volkswagen-Audi	58.3
France Telecom	50.6
Renault	46.9
General Motors	43.2
Coca-Cola	41.8
Vodafone	41.0

Source: Infoadex (estimate)

### Top ten television product categories (2007)

Category	TV expenditure €(mill)
Motoring	516.6
Food	419.5
Health & beauty	217.0
Telecoms & internet	311.1
Financial	276.7
Culture/media	221.3
Drinks	217.0
Retail/restaurants	203.5
Public & private services	139.3
Sports & free time	107.1

Source: Infoadex (estimate)

### Top television owners (2007)

Owner
Grupo Hachette Filipacchi, Telefónica, Planeta and Hobby Press-Axel Springer
Grupo Prisa
Unidad Editorial
Grupo Vocento

Source: ZM

### Top television sales houses (2007)

Sales house
Atres Advertising
Novomedia
Sogecable Media

Source: ZM

# NEWSPAPERS

## Newspapers

Title	Circulation (000s)	Adult readership (000s)	Full page B/W €	Adult CPT B/W €	Full page Colour €
<b>National dailies</b>					
El País	561	2,245	24,120	10.7	31,360
Marca	462	2,535	16,000	6.3	21,800
El Mundo del Siglo XXI	442	1,339	20,800	15.5	29,200
As	346	1,241	9,193	7.4	13,629
ABC	319	679	18,014	26.5	24,318
La Razón	217	386	8,250	21.4	11,550
Sport	157	575	4,011	7.0	3,496
Expansión (7/6)	80	165	8,250	50.0	11,555
Cinco Días (7/6)	60	87	7,150	82.2	9,400
La Gaceta de los Negocios (7/6)	55	-	6,854	-	8,975
El Economista (7/6)	48	46	6,680	145.2	9,290
El Mundo Deportivo	-	606	-	-	-
<b>Regional dailies</b>					
La Vanguardia	257	693	9,275	13.4	15,235
La Voz de Galicia	118	582	7,421	12.8	9,693
El Diario Vasco	99	318	4,385	13.8	-
Crónica del Sureste (7/5)	82	-	1,386	-	-
La Nueva España	69	353	37,200	105.4	55,700
Diario de Navarra	68	224	3,075	13.7	4,612
Heraldo de Aragón	64	279	3,360	12.0	4,704
Mini Diario (7/5)	61	-	3,500	-	4,550
Levante el Mercantil Valenciano	56	309	3,510	11.4	5,265
Las Provincias	54	197	3,390	17.2	-
Faro de Vigo	48	269	3,230	12.0	4,845
La Verdad	48	245	3,550	14.5	5,760
El Diario Montañés	46	195	3,300	16.9	-
Última Hora	43	197	3,338	16.9	5,007
El Norte de Castilla	42	231	2,760	11.9	-
Avui	41	137	2,345	17.1	3,205
Ideal Diario Regional de Andalucía	40	160	3,347	20.9	5,020
Sur	39	172	5,220	30.3	7,830
La Provincia	38	178	3,220	18.1	-
Canarias 7	37	167	3,220	19.3	-
El Punt	33	142	3,500	24.6	-
El Comercio	31	146	2,616	17.9	-
El Día	29	209	1,670	8.0	-
Diario de Cádiz	28	152	3,789	24.9	-
Hoy Diario de Extremadura	27	160	2,453	15.3	3,756
Diario de Mallorca	27	130	2,455	18.9	3,685

SPAIN: NEWSPAPERS

Newspapers cont.

Title	Circulation (000s)	Adult readership (000s)	Full page B/W €	Adult CPT B/W €	Full page Colour €
<b>Regional dailies</b>					
Alerta el Periódico de Cantabria	26	-	3,300	-	-
Deia	26	70	3,625	51.8	5,437
Diario de Sevilla	26	76	3,036	39.9	-
Diario de Noticias	24	82	2,300	28.0	3,450
El Correo de Andalucía	21	48	2,650	55.2	3,600
El Progreso	19	94	2,400	25.5	2,900
Diario de León	18	117	2,195	18.8	2,891
Super Deporte	18	78	2,065	26.5	2,684
La Gaceta de Salamanca	18	70	1,770	25.3	2,655
Córdoba	17	104	2,064	19.8	2,683
Segre	17	95	2,175	22.9	2,940
Diario de Burgos	16	94	1,985	21.1	2,571
Diari de Tarragona	16	83	2,284	27.5	3,198
Estadio Deportivo	16	42	1,458	34.7	1,884
Diario de Avisos	16	98	1,498	15.3	-
La Región	14	80	1,690	21.1	-
El Periódico La Voz de Asturias	13	62	2,550	41.1	3,825
La Voz de Cádiz	13	38	2,055	54.1	3,083
Mediterráneo	13	100	1,660	16.6	2,158
La Opinión de Murcia	12	56	1,675	29.9	-
La Voz de Almería	12	78	506	6.5	635
Diari de Girona	11	33	2,250	68.2	-
Diario de Almería (7/5)	11	11	1,200	109.1	-
Regio7	10	48	1,461	30.4	2,191
La Opinión de Málaga	10	21	1,935	92.1	-
Diario de Jerez	9	59	1,710	29.0	-
La Opinión a Coruña	9	35	1,950	55.7	-
Diario de Ibiza	9	39	1,775	45.5	2,663
El Periódico Extremadura	9	46	1,619	35.2	2,104
La Opinión de Tenerife	9	29	1,537	53.0	-
Jaén	9	56	1,648	29.4	2,266
Diario del Alto Aragón	9	38	1,470	38.7	2,205
La Opinión-El Correo de Zamora	9	51	1,690	33.1	-
Lanza	9	19	1,730	91.1	-
Málaga Hoy	8	33	2,270	68.8	-
Noticias de Gipuzkoa	8	33	2,500	75.8	3,750
Diario de Pontevedra	8	48	1,355	28.2	1,730
Huelva Información	8	48	1,800	37.5	-
La Mañana, Diari de Ponent	7	35	1,735	49.6	2,309
El Adelanto de Salamanca	7	22	1,296	58.9	1,684
Diari de Terrassa	6	28	700	25.0	900
Granada Hoy	6	26	1,755	67.5	-

SPAIN: NEWSPAPERS

Newspapers cont.

Title	Circulation (000s)	Adult readership (000s)	Full page B/W €	Adult CPT B/W €	Full page Colour €
<b>Regional dailies</b>					
Diari de Sabadell	6	24	700	29.2	924
La Opinión de Granada	6	10	1,563	156.3	-
Atlántico Diario	5	18	1,224	68.0	-
Europa Sur	5	45	1,440	32.0	-
Equipo	5	15	3,045	203.0	4,265
El Día de Córdoba	5	23	1,378	59.9	-
Odiel Información	5	19	1,400	73.7	1,800
La Tribuna de Ciudad Real	5	21	1,572	74.9	2,016
El Adelantado de Segovia	5	20	1,800	90.0	2,700
La Tribuna de Albacete	5	35	1,425	40.7	2,050
Heraldo Soria 7 días	4	19	1,295	68.2	1,818
El Pueblo de Albacete	3	11	1,397	127.0	1,998
Nueva Alcarria	3	9	848	94.2	1,063
La Tribuna de Toledo	2	9	1,124	124.9	1,409
La Tribuna de Cuenca	1	3	1,124	374.7	1,409
La Tribuna de Talavera	1	2	1,124	562.0	1,409
La Tribuna de Guadalajara	1	3	1,124	374.7	1,409
Área Diario del Campo de Gibraltar	-	5	-	-	-
Berria (7/6)	-	39	-	-	-
Bon Día (7/5)	-	13	-	-	-
Depor Sport	-	7	-	-	-
Deporte Campeón	-	14	1,184	84.6	1,539
Diari de Balears	-	16	1,668	104.3	2,503
Diario de Arousa	-	15	4,071	271.4	6,093
Diario de Ferrol	-	25	1,525	61.0	2,140
Diario de Noticias de Álava	-	21	-	-	-
Diario de Teruel	-	17	1,345	79.1	1,682
Diario La Rioja	-	98	-	-	-
El Correo Español el Pueblo Vasco	-	508	-	-	-
EL Correo Gallego	-	84	3,600	42.9	-
El Día de Cuenca	-	18	1,485	82.5	1,921
El Día de Toledo	-	7	1,260	180.0	1,590
El Día de Valladolid	-	15	1,655	110.3	2,462
El Diario de Ávila	-	20	-	-	-
El Diario Palentino	-	21	-	-	-
El Faro (Campo de Gibraltar)	-	8	-	-	-
El Faro Astorgano (7/5)	-	1	-	-	-
El Faro de Murcia	-	7	1,050	150.0	-
El Ideal Gallego	-	26	2,018	77.6	3,027
El Periódico	-	815	-	-	-
Gara	-	96	4,200	43.8	-
Información Alicante	-	222	-	-	-

SPAIN: NEWSPAPERS

**Newspapers cont.**

Title	Circulation (000s)	Adult readership (000s)	Full page B/W €	Adult CPT B/W €	Full page Colour €
<b>Regional dailies</b>					
Información Cádiz	-	11	1,200	109.1	-
La Crónica de Badajoz (7/5)	-	12	-	-	-
LV De Luns a Vendres (7/5)	-	32	-	-	-
Menorca Diario Insular	-	33	-	-	-
Nervión (7/5)	-	78	-	-	-
Noticias de La Rioja	-	5	-	-	-
Nueva Línea (7/5)	-	17	-	-	-
Tribuna de Salamanca	-	14	1,215	86.8	1,822
Viva Cádiz (7/5)	-	57	-	-	-
Viva Jaén (7/5)	-	21	-	-	-
Viva Jerez (7/5)	-	26	-	-	-
<b>Free dailies</b>					
20 Minutos (7/5)	-	2,866	30,250	10.6	40,825
ADN (7/5)	-	1,788	31,188	17.4	-
Metro Directo (7/5)	-	1,811	23,805	13.1	-
Que (7/5)	-	2,233	25,905	11.6	-

Source: EGM 2º Año Movil 2008, ZM

**Average CPT (B/W): €18.0**

## SPAIN: NEWSPAPERS

### Top ten newspaper advertisers (2007)

Advertiser	Newspaper expenditure €(mill)
Viajes El Corte Ingles	35.6
Viajes Marsans	28.5
Telefonica	25.1
Volkswagen-Audi	24.2
Daimler Chrysler	16.2
El Corte Ingles	15.4
Viajes Iberia	14.5
Viajes Halcón	13.3
Renault	13.0
Toyota	12.6

Source: Infoadex (estimate)

### Top ten newspaper product categories (2007)

Category	Newspaper expenditure €(mill)
Multi-category commerce	489.7
Travel & tourism	212.9
Motoring	197.4
Public & private services	184.9
Construction	173.6
Retail/restaurants	143.6
Culture/media	137.2
Office equipment	118.1
Telecoms & internet	57.5
Sports & free time	27.1

Source: Infoadex (estimate)

### Top newspaper owners (2007)

Owner
Grupo Godó
Grupo Hachette Filipacchi, Telefónica, Planeta and Hobby Press-Axel Springer
Grupo Prisa
Unidad Editorial
Grupo Vocento
Grupo Zeta

Source: ZM

### Top newspaper sales houses (2007)

Sales house
GDM
Novomedia
Publipress Media
Zeta Gestión de Medios

Source: ZM

# MAGAZINES

## Magazines

w=weekly 2w=twice weekly m=monthly			Adult	Full page	Adult CPT
Title		Circulation (000s)	readership (000s)	Colour €	Colour €
<b>Motoring</b>					
Automóvil	(m)	261	197	10,200	51.8
Auto Bild	(w)	113	153	9,480	62.0
Autovía	(m)	106	206	7,500	36.4
Motociclismo	(w)	65	263	7,225	27.5
Car And Driver	(m)	63	190	6,325	33.3
Auto Hebdo Sport	(w)	61	179	6,500	36.3
Moto Verde	(m)	60	313	4,300	13.7
Motor 16	(w)	59	140	9,200	65.7
Autopista	(w)	59	251	10,900	43.4
Coche Actual	(w)	57	170	10,300	60.6
Top Auto	(m)	55	147	6,612	45.0
Solo Moto 30	(m)	49	245	5,828	23.8
La Moto	(m)	45	154	7,140	46.4
Solo Auto 4X4	(m)	35	222	5,828	26.3
Auto Verde	(m)	29	88	6,400	72.7
Transporte Mundial	(m)	27	54	4,795	88.8
Avión Revue	(m)	27	30	3,690	123.0
Solo Moto Actual	(w)	-	215	5,173	24.1
Solo Camión	(m)	-	134	1,580	11.8
Autofácil	(m)	-	132	-	-
Maxi Tuning	(m)	-	585	7,186	12.3
Racc Club	(m)	-	734	10,920	14.9
Marca Motor	(m)	-	467	8,800	18.8
Todo Terreno	(m)	-	115	-	-
<b>TV</b>					
Tp	(w)	196	357	6,025	16.9
Fotogramas	(m)	158	630	10,800	17.1
Supertele	(w)	111	161	6,025	37.4
Telenovela	(w)	106	222	6,025	27.1
Cinemanía	(m)	95	301	8,700	28.9
Tele Indiscreta	(w)	62	183	6,025	32.9
Digital +	(m)	-	2,991	42,600	14.2
Revista R	(m)	-	202	3,800	18.8
Ono	(m)	-	1,897	17,500	9.2
<b>Music</b>					
Bravo por ti	(2w)	240	423	8,100	19.1
Super Pop	(2w)	219	495	8,500	17.2
Rolling Stone	(m)	61	215	10,440	48.6
La Revista 40	(m)	-	475	12,348	26.0
<b>Cinema, video &amp; photography</b>					
Audio Vídeo Foto Hoy	(m)	30	63	6,610	104.9



## SPAIN: MAGAZINES

## Magazines cont.

w=weekly 2w=twice weekly m=monthly		Circulation	Adult	Full page	Adult CPT
Title		(000s)	readership	Colour	Colour
			(000s)	€	€
<b>Women's</b>					
Pronto	(w)	1,111	3,359	19,500	5.8
Hola	(w)	675	2,376	21,200*	8.9
Diez Minutos	(w)	545	1,363	12,600	9.2
Que Me Dices	(w)	473	1,070	9,500	8.9
Elle	(m)	410	666	19,440	29.2
Glamour	(m)	408	558	18,492	33.1
Ar	(m)	334	354	11,500	32.5
Cuore	(w)	327	680	9,850	14.5
Cosmopolitan	(m)	315	798	16,200	20.3
Lecturas	(w)	315	1,181	12,410	10.5
Semana	(w)	307	1,341	12,100	9.0
Mia	(w)	266	575	13,180	22.9
Clara	(m)	250	551	14,695	26.7
Telva	(m)	246	397	15,800	39.8
Woman	(m)	239	348	15,300	44.0
Marie Claire	(m)	214	276	12,100	43.8
Vogue	(m)	187	702	19,680	28.0
Ragazza	(m)	130	171	12,540	73.3
Nuevo Vale	(w)	130	374	5,200	13.9
Loka Magazine	(m)	-	334	-	-
<b>Computing</b>					
Computer Hoy	(2w)	155	433	8,880	20.5
Pc Actual	(m)	123	348	9,640	27.7
Personal Computer & Internet	(m)	121	252	7,560	30.0
Playmania	(m)	115	311	7,572	24.3
Micromanía	(m)	63	199	5,508	27.7
Computer Hoy Juegos	(m)	52	193	8,880	46.0
Pc Today	(2w)	50	227	6,780	29.9
Windows Vista	(m)	-	277	-	-
<b>Business</b>					
Emprendedores	(m)	101	208	8,640	41.5
Capital	(m)	87	100	7,000	70.0
Actualidad Económica	(w)	35	67	7,400	110.4
Mi Cartera de Inversión	(w)	30	114	7,200	63.2
<b>Humour</b>					
El Jueves	(w)	126	706	6,000	8.5
<b>General Interest</b>					
Interviú	(w)	177	891	12,500	14.0
Tiempo	(w)	94	237	10,850	45.8
<b>Literature</b>					
Que Leer	(m)	58	109	5,430	49.8
Speak Up	(m)	-	75	4,500	60.0

## SPAIN: MAGAZINES

## Magazines cont.

<b>w=weekly 2w=twice weekly m=monthly</b>		<b>Circulation</b>	<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>
<b>Title</b>		<b>(000s)</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>
			<b>(000s)</b>	<b>€</b>	<b>€</b>
<b>Lifestyle</b>					
Fhm	(m)	238	548	15,750	28.7
Man	(m)	101	171	12,100	70.8
Primera Línea	(m)	56	106	6,500	61.3
Integral	(m)	36	162	4,980	30.7
Play Boy	(m)	35	144	9,600	66.7
<b>Sport</b>					
Instyle	(m)	162	119	16,560	139.2
Sport Life	(m)	91	273	6,170	22.6
Trofeo Caza	(m)	46	157	-	-
Jara y Sedal	(m)	41	322	-	-
Revista Oficial de la Nba	(m)	41	209	-	-
Runners World	(m)	40	88	-	-
Bike	(m)	38	108	-	-
Ciclismo a Fondo	(m)	37	171	3,765	22.0
Solo Bici	(m)	34	117	4,864	41.6
Trofeo Pesca	(m)	30	107	3,750	35.0
Jara y Sedal Pesca	(m)	25	191	-	-
<b>Science</b>					
Muy Interesante	(m)	348	2,316	19,800	8.5
Quo	(m)	343	1,286	14,850	11.5
Geo	(m)	82	351	9,120	26.0
Investigación y Ciencia	(m)	33	154	4,620	30.0
Año Cero	(m)	-	137	3,500	25.5
<b>History</b>					
Historia National Geographic	(m)	258	795	11,960	15.0
Historia y Vida	(m)	80	258	4,000	15.5
La Aventura de la Historia	(m)	72	278	7,975	28.7
Clio	(m)	70	113	5,790	51.2
<b>Travel</b>					
National Geographic	(m)	258	1,526	20,210	13.2
Viajes Nationalgeographic	(m)	90	564	9,200	16.3
Deviajes	(m)	60	168	7,260	43.2
Muchoviaje	(m)	42	209	8,000	38.3
Viajar	(m)	-	325	6,200	19.1
Rutas del Mundo	(m)	-	105	7,020	66.9
<b>Video games</b>					
Hobby Consolas	(m)	129	304	8,040	26.4
Nintendo Acción	(m)	108	212	6,540	30.8
Playstation	(m)	81	469	5,950	12.7
<b>Needlework</b>					
Labores del Hogar	(m)	107	431	8,964	20.8
Patrones	(m)	69	196	6,180	31.5

SPAIN: MAGAZINES

**Magazines cont.**

<b>w=weekly 2w=twice weekly m=monthly</b>		<b>Circulation</b>	<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>
<b>Title</b>		<b>(000s)</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>
			<b>(000s)</b>	<b>€</b>	<b>€</b>
<b>Health</b>					
Saber Vivir	(m)	408	1,335	10,440	7.8
Psychologies	(m)	279	404	11,820	29.3
Mente Sana	(m)	224	410	9,550	23.3
Aqua	(m)	117	90	-	-
Cuerpo-mente	(m)	115	310	6,000	19.4
Men's Health	(m)	112	210	10,255	48.8
Prevenir	(m)	38	52	4,140	79.6
Psicología Práctica	(m)	37	194	3,425	17.7
<b>Food</b>					
Comer Bien Cada Día	(m)	84	150	5,700	38.0
Cocina Ligera y Vida Sana	(m)	31	167	4,093	24.5
Cocina Fácil	(m)	-	665	7,236	10.9
<b>Art</b>					
Descubrir el Arte	(m)	36	105	7,975	76.0
<b>Family</b>					
Guía del Niño	(m)	88	220	6,474	29.4
Ser Padres Hoy	(m)	78	485	8,200	16.9
Crece Feliz	(m)	72	246	9,240	37.6
Mi Bebé y Yo	(m)	-	773	12,185	15.8
Tu Bebé	(m)	-	246	8,772	35.7
El Bebé de Ser Padres	(m)	-	275	8,200	29.8
<b>Decoration</b>					
El Mueble	(m)	360	1,352	21,600	16.0
Casa Diez	(m)	325	641	9,700	15.1
Cosas de Casa	(m)	287	801	12,110	15.1
Interiores	(m)	158	244	15,350	62.9
Casa al Día	(m)	157	280	6,510	23.3
Micasa	(m)	134	507	12,700	25.0
Nuevo Estilo	(m)	122	437	12,200	27.9
Casa y Jardín	(m)	99	213	8,200	38.5
Ad	(m)	84	87	-	-
Habitania	(m)	82	113	11,670	103.3
Arquitectura y Diseño	(m)	81	229	5,820	25.4
Casa Viva	(m)	80	153	-	-
El Mueble Casas de Campo	(m)	79	346	5,540	16.0
Casa & Campo	(m)	70	248	6,583	26.5
El Mueble Cocinas y Baños	(m)	49	412	8,160	19.8
Mi Jardín Plantas en Casa	(m)	29	173	3,198	18.5
Casa Joven	(m)	-	81	-	-
Bricolaje y Decoración	(m)	-	186	3,411	18.3

Source: EGM 2º Año Movil 2008, ZM \* full page B/W is €19,150

**Average CPT (Colour): €20.7**

## SPAIN: MAGAZINES

### Top ten magazine advertisers (2007)

Advertiser	Magazine expenditure €(mill)
L'Oréal	22.4
Estée Lauder	13.8
Telephone Publishing	13.1
Procter & Gamble	12.4
El Corte Ingles	11.0
Volkswagen-Audi	6.5
BMW Ibérica	4.8
LVMH	4.7
Grupo Itouch Movilisto	4.6
Jet Multimedia	4.3

Source: Infoadex (estimate)

### Top ten magazine product categories (2007)

Category	Magazine expenditure €(mill)
Health & beauty	102.4
Motoring	80.3
Home	67.8
Clothing	66.7
Retail/restaurants	54.4
Personal goods	37.4
Multi-category commerce	36.7
Sports & leisure	33.3
Culture/media	33.3
Public & private services	32.4

Source: Infoadex (estimate)

### Top magazine owners (2007)

Owner
Grupo Hachette Filipacchi, Telefónica, Planeta and Hobby Press-Axel Springer
Grupo Godó
Grupo Gruner Jahr & Motor Press Ibérica
Grupo Prisa
Grupo RBA Edipress
Unidad Editorial
Grupo Vocento
Grupo Zeta

Source: ZM

### Top magazine sales houses (2007)

Sales house
GDM
Interderco
Publipress Media
RBA Publiventas
Novomedia
Zeta Gestión de Medios

Source: ZM

# RADIO

**Number of radio households: 15,402,000 (95.5%)**

Source: EGM Hogares, 2º Acumulado 2008

**Average daily listening minutes per adult: 199**

Source: EGM 2º Año Movil 2008

## Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) €	Peak adult audience (000s)	30 sec peak adult CPT €
<b>National</b>					
Ser	general	2400-0100	9,998	1,215	8.2
C40	music	0900-1000	4,590	901	5.1
Cope	general	0800-0900	7,680	794	9.7
Onda Cero	general	0900-1000	7,200	669	10.8
Dial	music	1100-1200	3,810	575	6.6
Kiss FM	music	1100-1200	4,440	356	12.5
C100	music	0900-1000	1,870	297	6.3
Punto Radio	general	0900-1000	3,600	211	17.1
EuropaFM	music	1100-1200	1,650	191	8.6
Radio Olé	music	1100-1200	923	176	5.2
M80	music	1100-1200	1,125	159	7.1
Canal Fiesta Radio	music	1100-1200	286	126	2.3
Radio Marca	sport	1800-1900	731	77	9.5
Máxima FM	music	1800-1900	870	65	13.4
Rock & Gol	sport/music	1100-1200	840	44	19.1
Intereconomía	economy	2300-2400	1,390	40	34.8

SPAIN: RADIO

**Costs/audiences**

Station	Type	Peak time	Peak rate (30 sec) €	Peak adult audience (000s)	30 sec peak adult CPT €
<b>Main regional</b>					
Catalunya Radio	general	0800-0900	702	185	3.8
Canal Sur Radio	general	1000-1100	546	115	4.7
Radio Euskadi	general	0900-1000	195	81	2.4
Rac 1	general	0800-0900	525	79	6.6
Flaix	music	1800-1900	360	44	8.2
Euskadi Irratia	general	0800-0900	110	29	3.8
Radio Galega	general	1100-1200	-	28	-
Flaixbac	music	0800-0900	360	26	13.8
Cadena Top	music	1200-0100	221	24	9.2
Radio 9	general	2400-0100	-	23	-
Onda Madrid	general	1300-1400	-	14	-
Radio Vitoria	general	0900-1000	50	13	3.8
Radio Balear	general	0900-1000	-	11	-
Radio Voz	general	1000-1100	-	11	-
Com Radio	general	1000-1100	-	7	-
Herri Irratia	general	0900-1000	-	7	-
Aragón Radio	general	0800-0900	-	4	-
Canal Extremadura Radio	general	1000-1100	-	4	-
Ona FM	sport/music	0800-0900	-	3	-
Onda Regional Murcia	general	0800-0900	-	3	-
IB3	general	0800-0900	-	3	-
Radio 4	general	0800-0900	-	2	-
Radio Principado de Asturias	general	0900-1000	-	2	-

Source: EGM 2º Año Móvil 2008

**Average CPT (all commercial stations): €8.3**

SPAIN: RADIO

**Top ten radio advertisers (2007)**

Advertiser	Radio expenditure €(mill)
El Corte Inglés	32.4
Organización Nacional Ciegos	27.1
Dirección General de Trafico	25.7
Centro de Estudios CEAC	18.7
ING Direct	17.8
Comercial Publicidad Publipunto	17.5
Home English	14.0
Viajes Marsans	11.0
CCC Centro Cultura y Conocimiento	10.1
Telefonica	10.0

Source: Infoadex (estimate)

**Top ten radio product categories (2007)**

Category	Radio expenditure €(mill)
Culture/media	113.3
Public & private services	88.4
Retail/restaurants	86.7
Financial	73.5
Motoring	49.2
Travel & tourism	45.2
Multi-category commerce	36.9
Telecoms & internet	36.4
Drinks	27.8
Health	19.9

Source: Infoadex (estimate)

**Top radio owners (2007)**

Owner	Radio revenue €(mill)
Grupo Ser	336.1
Grupo Onda Cero	149.4
Grupo COPE	128.1
Grupo Punto Radio	24.5
Grupo Radio Blanca	17.4

Source: Infoadex (estimate)

**Top radio sales houses (2007)**

Sales house
GDM
Atres Advertising
Novomedia
CM Vocento
Publipress Media

Source: Agency records

# OUTDOOR

**Number of outdoor sites: 153,030**

## Type, size and cost of sites

Type/size of display	Number of sites	Cost per panel per month (€)
Airports	-	-
Urban furniture	70,500	-
Telephone boxes	36,000	-
Poster (8 x 3)	17,035	14,783
Shopping centre	12,100	-
Subway	11,900	-
Bus stop	3,010	-
Illuminated poster (8 x 3, 4 x 3)	2,420	32,154
Showcases	65	1,038

Source: ZM

## Top ten outdoor advertisers (2007)

Advertiser	Outdoor expenditure €(mill)
Pernod Ricard	14.7
Telefonica	13.7
Vodafone	9.0
El Corte Inglés	8.6
Bacardi	6.7
UnileverFood	6.4
Nokia Consumer Electronics	5.7
Ocaso	5.7
Hispano Foxfilms	4.9
Renault	4.8

Source: Infoadex (estimate)

## Top ten outdoor product categories (2007)

Category	Outdoor expenditure €(mill)
Retail/restaurants	73.6
Public & private services	51.0
Drinks	50.8
Telecoms & internet	42.0
Culture/media	40.8
Travel & tourism	31.2
Financial	31.0
Motoring	29.4
Health & beauty	22.4
Food	19.8

Source: Infoadex (estimate)

## Top outdoor contractors (2007)

Contractor	Outdoor revenue €(mill)
JCDecaux	159.1
Clear Channel	107.9
Cemusa	105.6
CBS Outdoor	49.5
Publimedia	18.0
Cabitel	15.3
014 Media	2.0
Indoor Media	1.8
TV 0	0.6

Source: Infoadex (estimate)



# CINEMA

**Number of cinema screens: 4,296**

Source: ZM

**Average cost of a 60 sec. spot per screen per week: €270**

Source: ZM

**Number of screens used in typical national campaign: 3,700**

Source: ZM

## Trend in admissions

	Admissions (mill)	Gross takings €(mill)
2003	137.5	639.4
2004	143.9	691.6
2005	127.6	635.9
2006	121.1	633.2
2007	116.9	643.7

Source: Ministerio de Educación y Cultura

## Cinema audience profile

Age	%
16-24	22.8
25-34	27.9
35-49	24.4
50+	21.2
Sex	%
Male	52.9
Female	47.1
Class	%
AB	15.9
C1	20.3
C2	42.9
D	18.4
E	2.6

Source: EGM 2º Año Movil 2008

## Top ten films (2007)

Film	Gross takings €(mill)
The Orphanage	24.3
Pirates of the Caribbean: At World's End	22.7
Shrek the Third	22.0
The Simpsons	18.4
Spiderman 3	18.2
Harry Potter and the Order of the the Phoenix	17.2
*300	15.0
Ratatouille	14.3
Night in the Museum	12.7
The Golden Compass	10.6

Source: Ministerio de Cultura

## Top ten cinema advertisers (2007)

Advertiser	Cinema expenditure €(mill)
Coca-Cola	3.8
Vodafone	3.2
Freixenet	1.2
State Lottery	1.1
Mahou	0.8
Ibéria	0.8
Telefonica	0.8
Seat	0.7
Renault	0.7
Canon	0.7

Source: Infoadex (estimate)

## Top ten cinema product categories (2007)

Category	Cinema expenditure €(mill)
Drinks	7.0
Telecoms & internet	4.8
Public & private services	4.5
Motoring	4.0
Retail/restaurants	3.1
Foods	2.2
Travel & tourism	2.0
Culture/media	2.0
Sports & leisure	1.6
Multi-category commerce	1.2

Source: Infoadex (estimate)

## Top cinema owners (2007)

Owner	Cinema revenue €(mill)
Moviercord	18.4
Screenvision	12.4
Discine	7.5

Source: Infoadex (estimate)

# INTERNET

**Homes with internet connection: 6,335,000 (39.2%)**

**Adult internet users: 16,076,000 (41.2%)**

**Adult internet users with home broadband: 10,452,000 (26.8%)**

**Typical monthly cost of internet access: €33**

**Average minutes spent online per day (adults with internet access):** Total: 140.2

At home: 96.8

Other place: 43.4

## Cost of display ads

Type	Typical cost per thousand €
Banner	6
Superbanner	12
Skyscraper 120 x 600	12
Skyscraper 160 x 600	12
Robapáginas 300 x 250	15
Robapáginas 200 x 200	15
Pop-up	20
Layer	20
Interstitial	24

Source: Adlink 2008

## Top ten search keywords

Keyword	Typical cost per click €
Hotel	1.28
Coche	0.92
Chat	0.82
Madrid	0.78
Video	0.74
TV	0.71
Viaje	0.61
Ruta	0.61
Alojamiento rural	0.57
Blog foro	0.53

Source: Google 2008

## Internet user profile

Age	%
16-24	20.5
25-34	27.8
35-54	35.9
55-64	7.2
65+	4.9
Sex	%
Male	57.0
Female	43.0
Class	%
AB	16.2
C1	21.9
C2	43.6
D	16.0
E	2.3

Source: EGM 2º Año Movil 2008

SPAIN: INTERNET

**Top ten internet sites (2007)**

Site	Unique visitors (000s) per month
Google	16,901
MSN/Windows Live	15,321
Microsoft	12,526
Yahoo!	8,247
YouTube	7,825
Terra	7,387
Blogger	6,604
eMule	6,192
Orange	5,946
Wikipedia	5,815

Source: Nielsen Netratings, NetView Dec. 2007

**Top ten search engines (2007)**

Search engine	Searches per month
Madrid	403,380
Hotel	159,150
Video	92,100
TV	74,760
Empleo	51,420
Chat	40,980
Coche	38,940
Viaje	28,710
Chica	25,980
Juego	23,520

Source: Google 2008

**Top ten internet advertisers (2007)**

Advertiser	Internet expenditure €(mill)
ING Direct	10.4
Match.com	8.9
Interflora	5.9
Meetic	5.7
Ford	5.6
Hachette Filipacchi	5.4
Vodafone	5.2
Telefónica	5.0
eBay	4.9
Grupo Endesa	4.6

Source: Infoadex (estimate)

**Top ten internet product categories (2007)**

Category	Internet expenditure €(mill)
Telecoms & internet	48.8
Financial	42.2
Culture/media	30.5
Motoring	24.4
Retail/restaurants	20.7
Multi-category commerce	19.5
Travel & tourism	13.2
Public & private services	13.2
Office equipment	5.4
Drinks	4.8

Source: Infoadex (estimate)

**Top ten internet owners (2007)**

Owner
Microsoft
Google
Telefónica/Terra
Yahoo!
France Telecom
RCS MediaGroup
Vocento
Emule-Project.net
Prisacom
eBay

Source: Nielsen Netratings, NetView Dec. 2007

**Top internet sales houses (2007)**

Sales house
CMV Vocento
GDM
Interdeco
Zeta Gestión de Medios
Adlink
Adconion
MSN
Yahoo
Antevenio

Source: ZM

## MEDIA REACH

### % reach by medium (adults)

	Daily	Weekly	Monthly
Conventional television	88.7	-	-
Mobile television	-	-	0.3
Newspapers	42.1	-	-
Magazines	-	25.1	42.4
Radio	53.1	-	-
Outdoor	51.0	-	-
Cinema	-	4.6	-
Internet	28.4	-	43.6

Source: EGM 2º Año Movil 2008

## OVERALL

### Top ten overall advertisers (2007)

Advertiser	Media expenditure €(mill)
Telefonica	172.3
Procter & Gamble	146.4
L'Oréal	121.0
El Corte Inglés	111.0
Volkswagen-Audi	99.2
Vodafone	80.3
Renault	75.9
ING Direct	72.5
France Telecom	71.3
Danone	70.1

Source: Infoadex (estimate)

### Top ten overall product categories (2007)

Category	Media expenditure €(mill)
Motoring	913.6
Multi-category commerce	711.0
Retail/restaurants	603.6
Financial	565.9
Health & beauty	559.6
Public & private services	528.0
Telecoms & internet	525.0
Foods	501.0
Travel & tourism	379.7
Drinks	360.7

Source: Infoadex (estimate)

### Top media owners (2007)

Owner
Grupo Prisa
Grupo Vocento
Grupo Gruner Jahr and Motor Press Ibérica
Grupo Godó
Unidad Editorial
Grupo Zeta
Grupo RBA Edipress
Grupo Hachette Filipacchi, Telefónica, Planeta and Hobby Press-Axel Springer

Source: ZM

### Top sales houses (2007)

Sales house
GDM
Sogecable Media
CMVocento
Publipress Media
Novomedia
Zeta Gestión de Medios
RBA Publiventas
Interderco
Adlink
Adconion
Antevenio

Source: ZM

# SWEDEN

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$ = 6.76 SKr at 2007 rate								
<b>Gross Domestic Product (SKr billion)</b>								
at current prices	2,217	2,326	2,421	2,515	2,625	2,735	2,900	3,074
% change	5.8	4.9	4.1	3.9	4.4	4.2	6.0	6.0
at 2007 prices	2,470	2,530	2,578	2,628	2,733	2,834	2,963	3,074
% change	4.8	2.4	1.9	1.9	4.0	3.7	4.6	3.7
<b>Gross Domestic Product per capita (SKr 000s)</b>								
at current prices	250.0	261.7	271.4	280.7	291.7	302.6	319.3	337.0
at 2007 prices	278.5	284.5	289.0	293.3	303.7	313.5	326.4	337.0
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	328	344	358	372	388	405	429	455
at 2007 prices	365	374	381	389	404	419	438	455
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	37.0	38.7	40.2	41.5	43.2	44.8	47.2	49.9
at 2007 prices	41.2	42.1	42.8	43.4	44.9	46.4	48.3	49.9
<b>Population</b>								
Millions	8.9	8.9	8.9	9.0	9.0	9.0	9.1	9.1
<b>Consumer Price Index</b>								
2007=100	89.8	92.0	93.9	95.7	96.1	96.5	97.8	100.0
% change	0.9	2.4	2.1	1.9	0.4	0.5	1.4	1.7
<b>Ad.spend as a % of GDP</b>								
	0.83	0.71	0.65	0.63	0.63	0.67	0.71	0.72
<b>Advertising Expenditure Growth (%)</b>								
at current prices	13.8	-10.9	-3.9	0.2	4.6	10.3	12.6	7.6
at 2007 prices	12.8	-13.0	-5.9	-1.7	4.2	9.7	11.1	5.3

Source: IFS, ZenithOptimedia

## ADVERTISING EXPENDITURE

### Advertising expenditure in SKr million at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	14,175	8,321	1,826	2,865	416	83	603	61
1998	15,732	8,925	2,155	3,204	517	74	650	207
1999	16,220	8,755	2,251	3,434	536	70	677	497
2000	18,466	9,338	2,614	3,959	592	78	848	1,037
2001	16,449	8,325	2,391	3,509	508	79	742	895
2002	15,805	7,728	2,217	3,446	472	79	797	1,066
2003	15,832	7,773	2,057	3,519	448	70	826	1,139
2004	16,557	7,851	2,157	3,749	491	59	925	1,325
2005	18,256	8,297	2,259	4,143	515	68	1,000	1,974
2006	20,557	8,848	2,415	4,546	604	74	1,069	3,001
2007	22,121	9,125	2,491	4,695	642	91	1,037	4,040

### Advertising expenditure in SKr million at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	15,967	9,373	2,057	3,227	469	93	679	69
1998	17,756	10,073	2,432	3,616	584	84	734	234
1999	18,233	9,842	2,530	3,860	603	79	761	559
2000	20,571	10,403	2,912	4,410	659	87	945	1,155
2001	17,887	9,053	2,600	3,816	552	86	807	973
2002	16,832	8,230	2,361	3,670	503	84	849	1,135
2003	16,545	8,123	2,150	3,677	468	73	863	1,190
2004	17,238	8,174	2,246	3,903	511	61	963	1,379
2005	18,918	8,598	2,341	4,293	534	70	1,036	2,046
2006	21,010	9,043	2,468	4,646	617	76	1,093	3,067
2007	22,121	9,125	2,491	4,695	642	91	1,037	4,040

Source: University of Gothenburg, Annonserforeningen, IRM

Notes:

1. After discounts
2. Includes classified
3. Excludes agency commission
4. Excludes production costs
5. Internet includes banner, boards, buttons, interstitials, classified, place, catalogue and search advertising

#### Main advertising restrictions:

**Tobacco:** Banned.

**Alcohol:** Advertising allowed on some channels at certain times.

**Pharmaceutical:** Prescription-only medicines not allowed.

**Children's:** Restricted. No ads for HFSS food products.

**Political:** Banned on TV.

## SWEDEN: POPULATION

# POPULATION

<b>Land area (km<sup>2</sup>)</b>	410,934
<b>Capital city</b>	Stockholm
<b>Language</b>	Swedish
<b>Currency</b>	Krona (SKr)

*Source: CIA Factbook 2008*

### Population by age

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
3-14	625	593	1,218
15-24	640	561	1,201
25-34	560	588	1,148
35-44	693	604	1,297
45-54	596	576	1,172
55-69	774	901	1,675
70+	513	640	1,153
<b>Total</b>	<b>4,401</b>	<b>4,463</b>	<b>8,864</b>

*Source: MMS*

### Population status

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
AB	735	666	1,401
C1	1,588	1,533	3,121
C2	963	1,183	2,146
D	859	860	1,719
E	178	165	343
<b>Total</b>	<b>4,323</b>	<b>4,407</b>	<b>8,730</b>

*Source: MMS*

#### Definition of status:

AB = university studies

C1 = 2-3 years of upper secondary school

C2 = nine years of compulsory schooling

D = currently studying full time

E = under school age



# TELEVISION

**Number of households: 4,695,000**

**Television homes with:**

Colour	99.9%
VCR	63.0%
DVD	75.0%
PVR/DVR	24.2%
Multiset	61.2%
Teletext	97.0%
Remote control	99.9%
Cable (connection) - total	42.8%
Digital cable (connection)	13.0%
Satellite dish (DTH) - total	23.7%
Digital satellite dish	23.7%
Digital terrestrial television (DTT)	30.0%
IPTV	1.8%

*Source: MMS, Mediavision, Orvesto Konsument 2008:1*

**TV licence cost (per year): €209**

**Average minutes viewed per day per adult: 149**

**Average pay-TV subscription cost (per month):**

	Average subscription (€)
Cable (analogue)	13.3
Cable (digital)	20.5
DTH (digital)	16.4
DTT	30.8
IPTV	30.8

*Source: Operators*

## SWEDEN: TELEVISION

### Main channels

Channel	Technical penetration (%)	Daily hours of transmission	Ad mins per week
<b>Non-commercial</b>			
SVT1	100	23	-
SVT2	100	15	-
<b>Commercial</b>			
TV3	79	24	1,512
TV4	99	24	1,008
Kanal5	78	24	1,512
TV6	79	24	1,512
TV4+	74	24	1,008
MTV	68	24	1,512
Discovery	62	24	1,512
Eurosport	69	24	1,512

Source: MMS

### Cost/audience

Channel	Peak time	Peak rate 30 sec €	Peak adult audience (000s)	30 sec peak adult CPT €
TV3	1755-2329	1,424	192	7.4
TV4	1800-2330	1,768	506	3.5
Kanal5	1800-2330	1,400	183	7.7
TV6	1755-2329	1,353	61	22.3
TV4+	1800-2330	689	60	11.4
MTV	1800-2330	693	13	52.7
Discovery	1800-2330	656	28	23.1
Eurosport	1800-2330	956	25	37.9

Source: Broadcasters

**Average CPT (all commercial channels): €8.4**

SWEDEN: TELEVISION

**Share of viewing & ad revenue**

Channel	Share of viewing (%) 2007		Gross ad revenue 2007
	Individuals	Adults	€(000s)
<b>Non-commercial</b>			
SVT1	18.9	18.9	-
SVT2	12.4	13.4	-
<b>Commercial</b>			
TV3	9.4	9.7	426,403
TV4	21.1	22.0	528,252
Kanal5	8.2	8.3	406,801
TV6	4.5	4.4	162,803
MTV	1.1	1.0	23,729
Discovery	1.9	2.0	-
Eurosport	1.4	1.5	-
TV4+	3.3	3.5	-

Source: MMS, RM2007

**Top ten television programmes (2007)**

Programme	Channel	Adult TVR
Melodifestivalen 2007 Final	SVT1	44.8
Kalle anka och hans vänner	SVT1	39.4
Eurovision Song Contest 2007 Final	SVT1	38.6
Melodifestivalen 2007	SVT1	36.2
På spåret	SVT1	27.9
Svenska Idrottsgalan	SVT1	27.1
Saltön	SVT1	26.9
Playa del sol	SVT1	26.6
Allsång på Skansen	SVT1	25.6
Alpint VM 2007 Åre 2007	SVT1	25.2

Source: MMS

### Top ten television advertisers (2007)

Advertiser	TV expenditure €(000s)
Unilever	48,455
L'Oréal	34,898
Procter & Gamble	33,559
Telia	26,176
Tele 2	25,591
Carlsberg	24,433
SV Spel	22,609
McNeil	22,324
Viasat	21,637
3	20,599

Source: RM 2007

### Top ten television product categories (2007)

Category	TV expenditure €(000s)
Lotteries/games	73,097
Cars	60,529
Clothing	58,091
Telecoms	57,575
TV/hifi retailers	35,410
Broadcasting media	35,189
CDs/DVDs	34,134
Finance	33,372
Digital TV	32,262
Fast food	29,388

Source: RM 2007

# NEWSPAPERS

## Newspapers

<b>d=daily</b>		<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>
<b>Title</b>	<b>Circulation</b>	<b>readership</b>	<b>B/W</b>	<b>B/W</b>
	<b>(000s)</b>	<b>(000s)</b>	<b>€</b>	<b>€</b>
Aftonbladet	417	1,201	17,834	14.8
Dagens Nyheter	347	894	24,670	27.6
Expressen (inc GT and KP)	326	1,001	15,530	15.5
Stockholm City	298	532	11,509	21.6
Metro Sthlm (d)	281	678	14,230	21.0
Göteborgs-Posten	243	573	15,245	26.6
Svenska Dagbladet	194	486	14,340	29.5
Sydsvenskan	123	311	12,581	40.5
Dagens Industri	118	405	12,790	31.6
Metro Gbg (d)	102	270	6,120	22.7
Metro Skåne (d)	100	277	5,850	21.1
Helsingborgs Dagblad	82	180	10,337	57.4
Östgöta Correspond	59	142	6,026	42.4
Upsala Nya Tidning	57	147	6,260	42.6
Nya Werml,Tidningen	57	135	4,550	33.7
GävleTidningar Vardag	54	112	6,336	56.6
GävleTidningar Söndag	53	101	6,336	62.7
Borås Tidning	49	105	5,088	48.5
Norrköpings Tidn	48	109	5,556	51.0
Vestmanlands Läns Tidning	45	110	6,017	54.7
City Malmö/Lund	41	102	2,016	19.8
Norrl, Soc,Demokrat	40	104	3,094	29.7
Jönköpings-Posten/Smål Alleh	40	92	6,635	72.1
Smålandsposten	40	91	4,574	50.3
Skånska Dagbl,	39	98	5,513	56.3
Västerbottens-Kurir	39	82	5,060	61.7
Blt Tot	36	83	4,267	51.4
Sundsvalls Tidning	34	76	5,524	72.7
Hallandsposten	33	80	5,050	63.1
Bohuslänningen	33	77	4,560	59.2
Hallands Nyheter	32	81	3,888	48.0
Östersunds-Posten	30	74	4,195	56.7
Kristianstadsbladet	30	69	5,448	79.0
Ttela	29	65	4,560	70.2
Norra Västerbotten	28	56	3,972	70.9
Norrbottens-Kuriren	27	76	3,967	52.2
Gefle Dagblad	27	72	6,336	88.0
Arbetarbladet Gävle	26	58	6,336	109.2
Värmlands Folkblad	22	61	2,100	34.4
Dala-Demokraten	20	56	4,018	71.7

SWEDEN: NEWSPAPERS

*newspapers (contd)*

<b>d=daily</b>		<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>
<b>Title</b>	<b>Circulation</b>	<b>readership</b>	<b>B/W</b>	<b>B/W</b>
	<b>(000s)</b>	<b>(000s)</b>	<b>SKr €</b>	<b>SKr €</b>
Dagen	18	57	2,000	35.1
Metro (Metropol)	-	1,589	35,180	22.1
Metro Riks (d)	-	444	8,980	20.2
Närkes Allehanda	-	153	6,456	42.2
Barometern	-	79	5,472	69.3
Falu Kuriren	-	65	3,629	55.8

Source: Orvesto 2008:1

**Average CPT (B/W): €32.0**

### Top ten newspaper advertisers (2007)

Advertiser	Newspaper expenditure €(000s)
ICA	35,883
Telia	33,040
Kooperativa Förbundet	29,953
Fastighetsbyrå Swedbank	20,307
Sv Fastighetsförmedling	15,175
Bjurforsgruppen	14,280
Volkswagen	13,658
Skandia Mäklarna	12,553
Övrig Annonser	11,855
Vi-Butikerna	11,783

Source: RM 2007

### Top ten newspaper product categories (2007)

Category	Newspaper expenditure €(000s)
Estate agents	164,691
Cars	127,954
Groceries	107,589
Car retailers	65,970
Furniture	54,387
Warehouses	42,589
Non-profit organisations	39,267
Sports retail	36,415
Clothing	35,101
Civic information	29,015

Source: RM 2007

### Top ten newspaper owners (2007)

Owner	Newspaper revenue €(000s)
DN	159,422
Metro	158,523
SMP	126,300
GP	124,463
SDS	110,615
Aftonbladet	108,297
SVD	96,888
Expressen	72,709
Mitt I Tidningarna	68,292
Dagens Industri	55,290

Source: RM 2007

# MAGAZINES

## Magazines

w=weekly m=monthly f=fortnightly q=quarterly Title	Circulation (000s)	Adult readership (000s)	Full page Colour €	Adult CPT Colour €
<b>Business</b>				
Privata Affärer (m)	93	273	6140	22.5
<b>Family</b>				
Hemmets Journal (w)	232	506	4,640	9.2
Allers (w)	226	518	4,500	8.7
Hemmets Veckotidning (w)	219	418	3,900	9.3
Året Runt (w)	181	409	3,950	9.7
Svensk Damtidning (w)	145	338	3,400	10.1
Se & Hör (w)	134	384	3,400	8.9
Hänt Extra (w)	127	422	3,400	8.1
Allas (w)	127	340	4,100	12.1
<b>General</b>				
Vi i Villa (m)	2,039	2,363	31,800	13.5
Ikea Family Live (q)	739	1,081	10,900	10.1
Villaägaren (q)	332	932	5,490	5.9
Land (w)	234	607	6,900	11.4
Icakuriren (w)	192	603	7,450	12.4
Illustrerad Vetenskap (m)	162	756	5,540	7.3
<b>Health</b>				
Hälsa (m)	248	51	3,250	63.7
I Form (m)	219	57	3,660	64.2
Topphälsa (m)	109	53	3,900	73.6
Aftonbladet Kropp&Hälsa (w)	-	486	4,500	9.3
<b>Interior design</b>				
Elle Interiör (m)	222	59	5,980	101.4
Hus & Hem (m)	125	524	5,890	11.2
Sköna Hem (m)	99	438	5,450	12.4
Hem Ljuva Hem (m)	50	160	3,250	20.3
Plaza Interiör (m)	47	151	3,950	26.2
Residence (m)	44	109	3,990	36.6
Aftonbladet Härligt Hemma (w)	-	372	5,400	14.5
Ex/Gt/Kvp Leva&Bo (w)	-	344	4,900	14.2
<b>Men's general</b>				
Svensk Jakt (m)	155	277	3,885	14.0
Vi Bilägare (m)	147	404	5,490	13.6
Ny Teknik (w)	147	327	7,920	24.2
Motor (m)	122	173	3,260	18.8
Pc För Alla (m)	59	221	7,090	32.1
Teknikens Värld (f)	55	316	3,990	12.6
Bilsport (f)	46	203	3,160	15.6



SWEDEN: MAGAZINES

*magazines (contd)*

<b>w=weekly m=monthly f=fortnightly q=quarterly</b>		<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>
<b>Title</b>	<b>Circulation (000s)</b>	<b>readership (000s)</b>	<b>Colour €</b>	<b>Colour €</b>
Sportmagasinet (m)	34	189	4,375	23.1
Di Weekend (w)	-	345	12,790	37.1
Aftonbladet Bil	-	284	5,000	17.6
Motorbörser (w)	-	186	1,160	6.2
<b>Men's lifestyle</b>				
Café (m)	36	147	5,580	38.0
King (m)	-	79	6,650	84.2
<b>Teenage</b>				
Cosmopolitan (m)	76	173	5290	30.6
Vecko-Revyn (f)	58	194	4450	22.9
Okej (m)	29	42	2760	65.7
<b>TV listings</b>				
Aftonbladet Tv (w)	-	978	7,150	7.3
Expressen/GT/KP Tv (w)	-	477	5,900	12.4
<b>Women's lifestyle</b>				
Damernas Värld (m)	264	112	6,490	57.9
Elle (m)	264	83	7,310	88.1
Femina (m)	242	122	5,300	43.4
Tara (m)	205	110	5,250	47.7
Amelia (f)	123	372	7,450	20.0
Plaza Kvinna (m)	94	42	4,000	95.2

Source: Orvesto 2008:1

**Average CPT (Colour): €15.7**

### Top ten magazine advertisers (2007)

Advertiser	Magazine expenditure €(000s)
L'Oréal	4,178
Beiersdorf	2,694
Unilever	2,569
L'Oréal Luxury Products	2,460
Procter & Gamble	2,377
Arla Foods	2,100
Husqvarna	1,977
Electrolux	1,708
Skånska Byggvaror	1,694
Åhlens	1,625

Source: RM 2007

### Top ten magazine product categories (2007)

Category	Magazine expenditure €(000s)
Interior design	8,616
Face cream	6,959
Cars	6,867
Clothes	6,780
Furniture	5,519
Telecommunications	5,152
Construction	4,997
Health products	4,814
Wine	4,812
Heat suppliers	4,165

Source: RM 2007

### Top ten magazine media owners (2007)

Owner	Magazine revenue €(000s)
Vi I Villa	21,532
Amelia	11,166
Elle	10,991
Ica-Kur	8,751
Damernas Värld	7,682
Sköna Hem	7,077
Hu&Hem	7,047
Land Fam	6,173
Cafe	5,833
Allt Om Mat	4,470

Source: RM 2007

# RADIO

## Number of radio households: 3

Source: RBP 2008:III

## Number of commercial radio stations: 90

Source: RBP 2008:III

## Average daily listening minutes per adult: 136

Source: RBP 2008:III

## Audiences

Station	Type	Peak time	Peak adult audience (000s)
<b>National</b>			
Rix FM	music	1200	457
NRJ	music	1200	41
Lugna Favoriter	music	1200	71
Mix Megapol	music	1200	275
The Voice	music	1200	22
<b>Main regional</b>			
Rix FM	music	1200	26
NRJ	music	1200	18
Lugna Favoriter	music	1200	18
Mix Megapol	music	1200	41
The Voice	music	1200	7

Source: ZenithOptimedia records

## Average CPT (all commercial stations): €30

## Top ten radio advertisers (2007)

Advertiser	Radio expenditure €(000s)
Telia	5,179
McDonald's	3,966
Toyota	1,637
Eniro	1,591
Tele 2	1,442
Statoil Detaljhandel	1,363
Preem Petroleum	1,311
Ge Money Bank	1,279
ICA	1,260
Aftonbladet	1,200

Source: RM 2007

### Top ten radio product categories (2007)

Category	Radio expenditure €(000s)
Retail	17,337
Office/data/communication	11,536
Cars/accessories	8,725
Financial	7,264
Information	5,522
Travel/tourism/transport	4,716
Books/media/education	4,061
General care/health care	3,258
Food/drinks/tobacco	3,244
Petroleum	3,130

Source: RM 2007

### Top radio owners (2007)

Owner	Radio revenue €(000s)
MTG Radio	46,245
SBS Radio	27,604

Source: RM 2007

### Top radio sales houses (2007)

Sales house	Radio revenue €(000s)
MTG Radio	46,245
SBS Radio	27,604

Source: RM 2007

## OUTDOOR

**Number of outdoor sites: 46,000**

### Type, size and cost of sites

Type/size of display	Number of sites	Cost per panel per month (€)
Eurosize	22,000	240
Billboards	2,450	255
Pillars	2,505	160

Source: Clear Channel, JCDecaux

### Top ten outdoor product categories (2007)

Category	Outdoor expenditure €(000s)
Broadcast media	9,397
Cars	6,782
GSM providers	6,570
Mobile telephones	4,655
Groceries	4,478
Clothing	4,307
Airlines	4,205
Film companies	3,535
Lotteries/games	3,325
Discount warehouses	3,322

Source: RM 2007

## CINEMA

**Number of cinema screens: 687**

Source: SF Media

**Average cost of a 60 sec. spot per screen  
per week: €55**

Source: SF Media

**Average CPT: €82.5**

**Number of screens used in typical  
national campaign: 418**

Source: SF Media

## SWEDEN: CINEMA

### Trend in admissions

	Admissions (mill)	Gross takings €(mill)
2002	18.3	141.6
2003	18.2	145.2
2004	16.6	135.1
2005	14.6	119.1
2006	14.8	125.6

Source: SFI

### Cinema audience profile

<b>Age</b>	<b>%</b>
15-24	26.0
25-34	19.0
35-44	14.0
45+	26.0
<b>Sex</b>	<b>%</b>
Male	49.5
Female	50.5
<b>Income (€)/Class</b>	<b>%</b>
Low income (0-2,015)	53.6
Medium income (2,015-3,712)	38.5
High income (3,712 and over)	7.9

Source: Orvesto Konsument 2008:1

### Top ten films (2007)

Film	Gross takings €(000s)
Pirates of the Caribbean 3: At World's End	8,102
Harry Potter and the Order of the Phoenix	6,629
Göta Kanal 2	4,860
Ratatouille	4,732
Arn: The Knight Templar	4,277
Spider-Man 3	3,963
Simpsons	3,883
Shrek 3	3,858
Die Hard 4.0	2,564
Night at the Museum	2,539

Source: SFI

### Top ten cinema advertisers (2007)

<b>Advertiser</b>	<b>Cinema expenditure €(000s)</b>
Coca Cola	1,260
Rädda Barnen	613
MTG	495
Red Bull	376
Henkel Norden	369
3	315
Santa Maria	307
Sony Ericsson	294
McDonald's	281
JC Jeans & Clothes	273

Source: RM 2007

### Top ten cinema product categories (2007)

<b>Category</b>	<b>Cinema expenditure €(000s)</b>
Other retail	1,494
Carbonated soft drinks	1,143
Non-profit organizations	737
Passenger cars	724
Broadcasting media	721
Mobile phones	568
Telecom providers	559
Public information	534
Styling	455
Sport drinks	376

Source: RM 2007

### Top cinema sales house (2007)

<b>Sales house</b>	<b>Cinema revenue €(000s)</b>
SF Media	14,688

Source: RM 2007

# INTERNET

**Homes with internet connection: 3,480,190 (83%)**

**Adult internet users: 6,077,500 (85%)**

**Adult internet users with home broadband: 4,862,000**

**Typical monthly cost of internet access: €20**

**Average minutes spent online per day (adults with internet access): 96**

## Cost of display ads

Type	Typical cost per thousand (€)
Banner	8
Interstitial	50
Streaming video	12

*Source: ZenithOptimedia records*

## Top ten internet sites (2008)

Site	Unique visitors per week
msn.se	6,732,266
Aftonbladet	4,039,029
Eniro.se	2,607,313
hitta.se	2,331,399
expressen.se	1,758,951
Bilddagboken.se	1,359,433
blogg.se	1,235,225
svt.se Webb-tv	1,235,120
di.se	1,115,192
hemnet.se	1,055,172

*Source: KialIndex (week 40 2008)*



## Top ten internet advertisers (2007)

Advertiser
Hotels.com
Blocket
Bostart
Monster
Match.com
e-kontakt.se
Telia
Svenska Spel
InkClub
VG Nett

Source: Nielsen Adrelevance

## Top ten internet product categories (2007)

Category
Travel agents/tour operators
Consumer services
Dating
Employment
Property
Press editors/magazines
Casinos/lotteries
Telecom providers
Specialised e-commerce
Transport

Source: Nielsen Adrelevance

## MEDIA REACH

### % reach by medium (adults)

	Daily	Weekly	Monthly
Conventional television	68.3	88.2	96.2
Newspapers	-	72.0	-
Magazines	-	46.0	-
Radio	-	76.0	-
Outdoor	-	70	-
Cinema	-	3.0	10.4
Internet	64.0	80.0	83.0

Source: ZenithOptimedia records

## OVERALL

### Top ten overall advertisers (2007)

Advertiser	Media expenditure € (000s)
ICA	87,486
Telia	70,077
Kooperativa Förbundet	70,045
Unilever	55,825
Tele 2	41,658
L'Oréal	39,336
Elgiganten	37,588
Procter & Gamble	35,581
SV Spel	32,117
3	32,016

Source: ZenithOptimedia records

### Top ten overall product categories (2007)

Category	Media expenditure € (000s)
Groceries	249,577
Cars	211,897
Real estate	180,482
TV/hifi retailers	123,481
Clothing	105,977
Lotteries/games	102,851
Furniture/carpets	100,287
GSM providers	93,093
DIY	88,708
Auto retailers	85,537

Source: ZenithOptimedia records

# SWITZERLAND

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$= 1.20 CHF at 2007 rate								
<b>Gross Domestic Product (SF billion)</b>								
at current prices	415.5	430.3	434.3	437.7	451.4	463.7	486.2	503.3
% change	4.4	3.6	0.9	0.8	3.1	2.7	4.9	3.5
at 2007 prices	441.3	452.6	453.8	454.4	464.9	472.1	489.9	503.3
% change	2.8	2.6	0.3	0.1	2.3	1.6	3.8	2.7
<b>Gross Domestic Product per capita (SF 000s)</b>								
at current prices	57.2	59.0	59.3	59.5	61.1	62.5	65.3	67.3
at 2007 prices	60.8	62.1	62.0	61.7	62.9	63.6	65.8	67.3
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	346.3	358.6	361.9	364.8	376.2	386.4	405.2	419.4
at 2007 prices	367.7	377.2	378.2	378.7	387.4	393.5	408.2	419.4
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	47.7	49.2	49.4	49.6	50.9	52.1	54.4	56.1
at 2007 prices	50.6	51.7	51.7	51.4	52.4	53.0	54.8	56.1
<b>Population</b>								
Millions	7.3	7.3	7.3	7.4	7.4	7.4	7.5	7.5
<b>Consumer Price Index</b>								
2007=100	94.2	95.1	95.7	96.3	97.1	98.2	99.2	100.0
%change	1.6	1.0	0.7	0.7	0.8	1.1	1.1	1.0
<b>Adspend as a % of GDP</b>								
	1.05	0.97	0.88	0.82	0.72	0.73	0.76	0.80
<b>Advertising Expenditure Growth (%)</b>								
at current prices	8.9	-4.2	-8.2	-6.1	-10.0	4.5	8.9	8.9
at 2007 prices	7.3	-5.1	-8.8	-6.7	-10.7	3.4	7.8	8.1

Source: IFS, ZenithOptimedia

# ADVERTISING EXPENDITURE

## Advertising expenditure in CHF (mill) at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	3,407	1,850	594	370	107	39	447	-
1998	3,596	1,926	640	402	114	40	468	6
1999	3,997	2,118	717	486	120	42	502	12
2000	4,354	2,250	783	520	139	45	592	25
2001	4,171	2,150	736	494	129	40	603	19
2002	3,831	1,861	685	527	129	38	571	20
2003	3,596	1,646	656	533	127	38	566	30
2004	3,238	1,134	767	737	129	50	392	29
2005	3,385	1,157	795	810	135	50	402	36
2006	3,686	1,328	808	889	136	50	423	52
2007	4,014	1,415	872	1,054	137	47	437	52

## Advertising expenditure in CHF (mill) at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	3,703	2,011	646	402	116	42	486	-
1998	3,909	2,094	696	437	124	43	509	7
1999	4,311	2,285	773	524	129	45	541	13
2000	4,624	2,390	832	552	148	48	629	27
2001	4,387	2,262	774	520	136	42	634	20
2002	4,003	1,945	716	551	135	40	597	21
2003	3,733	1,709	681	553	132	39	588	31
2004	3,335	1,168	790	759	133	51	404	30
2005	3,447	1,178	809	825	137	51	409	37
2006	3,714	1,338	814	896	137	50	426	52
2007	4,014	1,415	872	1,054	137	47	437	52

Source: 1997-2003 Stiftung Werbestatistik Schweiz, except 2003 online figure Agency estimate, 2004-2007 Media Focus

- Notes:
1. Excludes agency commission to 2003, includes from 2004 onwards
  2. After discounts to 2003, before discounts 2004 onwards
  3. Excludes production costs
  4. Includes classified advertising to 2003, excludes 2004 onwards
  5. Internet figures are display only

### Main advertising restrictions:

**Tobacco:** Not allowed on TV and radio.

**Alcohol:** Beer and wine only allowed on local TV and radio.

**Pharmaceutical:** Only OTC.

**Children's:** Some restrictions on TV and radio.

**Political:** Not allowed on TV and radio.

## POPULATION

Land area (km <sup>2</sup> )	41,284
Capital city	Bern
Languages	German, French, Italian, Romanch
Currency	Franc (CHF)

### Population by age

	Male (000s)	Female (000s)	Total (000s)
0-19	839	793	1,631
20-39	1,019	1,017	2,036
40-64	1,346	1,336	2,682
65-79	404	487	891
80+	121	234	354
Total	3,727	3,866	7,593

Source: ESOP - 2007

## TELEVISION

**Number of households: 3,336,578**

**Number of television households: 3,103,107 (93.0%)**

### Television homes with:

Colour	95.0%
VCR	59.0%
DVD	59.0%
PVR/DVR	5.0%
Multiset	29.0%
Teletext	84.0%
Remote control	90.0%
Cable (connection) - total	78.0%
Digital satellite dish	9.0%

Source: Bundesamt für Statistik, SECO / SRG SSR Idée Suisse, Annual

SWITZERLAND: TELEVISION

**TV licence cost (per year): CHF 281.4**

**Average minutes viewed per day per adult: 139**

**Average pay-TV subscription cost (per month):  
CHF 9.90 - CHF 47.90**

*Source: ZenithOptimedia records*

**Main channels**

<b>Channel</b>	<b>Technical penetration (%)</b>	<b>Daily hours of transmission</b>	<b>Ad mins per week</b>
<b>Commercial</b>			
SF1 (G)	98.8	24	806
SF2 (G)	98.3	24	806
TSR1 (F)	100.0	24	806
TSR2 (F)	99.5	24	806
TSI1 (I)	94.2	24	806
TSI2 (I)	93.9	24	806
StarTV (G)	79.9	24	1,512
VIVA CH (G)	89.9	24	1,512
3plus (G)	73.5	24	1,512
MTV (G - Swiss window)	80.6	24	1,512
RTL (G - Swiss window)	94.7	24	1,512
RTL2 (G - Swiss window)	98.8	24	1,512
Pro7 (G - Swiss window)	98.9	24	1,512
Sat.1 (G - Swiss window)	99.0	24	1,512
VOX (G - Swiss window)	98.3	24	1,512
Kabel1 (G - Swiss window)	98.4	24	1,512
M6 (F - Swiss window)	97.6	24	1,512

*Source: Mediapulse*

SWITZERLAND: TELEVISION

**Cost/audience**

<b>Channel</b>	<b>Peak time</b>	<b>Peak rate 30 sec CHF</b>	<b>Peak adult audience (000s)</b>	<b>30 sec peak adult CPT CHF</b>
SF1 (G)	1900-2230	41,250	1,298	31.8
SF2 (G)	1900-2230	24,250	525	46.2
TSR1 (F)	1900-2230	15,450	380	40.6
TSR2 (F)	1900-2230	7,450	172	43.2
TSI1 (I)	1900-2230	2,700	78	34.7
TSI2 (I)	1900-2230	900	25	36.0
StarTV (G)	1900-2230	-	-	-
VIVA CH (G)	1900-2230	660	20	32.7
3plus (G)	1900-2230	2,760	86	32.0
MTV (G - Swiss window)	1900-2230	450	23	19.9
RTL (G - Swiss window)	1900-2230	6,690	235	28.4
RTL2 (G - Swiss window)	1900-2230	2,340	79	29.7
Pro7 (G - Swiss window)	1900-2230	6,060	199	30.5
Sat.1 (G - Swiss window)	1900-2230	4,800	171	28.0
VOX (G - Swiss window)	1900-2230	3,240	97	33.6
Kabel1 (G - Swiss window)	1900-2230	2,460	105	23.4
M6 (F - Swiss window)	1900-2230	3,840	113	34.0

Source: Telecontrol

**Average CPT (all commercial channels): CHF 34.7**

**Share of viewing**

<b>Channel</b>	<b>Share of viewing (%)</b>	
	<b>Individuals</b>	<b>Adults</b>
<b>Commercial</b>		
SF1 (G)	24.1	25.1
SF2 (G)	8.2	8.1
RTL (G)	7.0	7.2
Pro7 (G)	4.3	4.2
Sat.1 (G)	6.0	6.2
VOX (G)	3.5	3.6
RTL2 (G)	2.7	2.7
Kabel 1 (G)	2.2	2.3
S RTL (G)	2.8	1.5
3plus (G)	1.3	1.4
MTV (G)	0.6	0.5
VIVA CH (G)	0.5	0.5
StarTV (G)	0.2	0.2
TNC_T (G)	3.0	3.2
TSR1 (F)	24.3	25.2
TSR2 (F)	6.4	6.4
M6 (F)	9.1	9.0
TSI1 (I)	24.3	24.8
TSI2 (I)	6.2	6.4

Source: Telecontrol

SWITZERLAND: TELEVISION

**Top ten television programmes (2007)**

<b>Programme</b>	<b>Channel</b>	<b>Adult TVR (000s)</b>
Euro 2008 Switzerland v Ukraine	SF2	2,552
Euro 2008 Italy v France	SF 1	2,282
Euro 2008 Switzerland v South Korea	SF2	2,267
Tagesschau	SF 1	2,087
Euro 2008 France v Switzerland	SF2	2,042
Euro 2008 Portugal v France	SF 1	1,824
Euro 2008 Germany v Italy	SF 1	1,757
Schweiz Aktuell	SF 1	1,682
Ski Og Downhill (M.)	SF2	1,561
Ski Downhill (M.)	SF2	1,509

Source: Telecontrol

**Top ten television advertisers (2007)**

<b>Advertiser</b>	<b>TV expenditure CHF (000s)</b>
Migros	64,321
L'Oréal	49,653
Nestlé	40,512
Unilever	31,122
Procter & Gamble	30,202
Reckitt Benckiser	25,809
Co-op	25,765
Gillette	23,137
Coca-Cola	21,782
Swisscom	17,072

Source: Media Focus 07

**Top ten television product categories (2007)**

<b>Category</b>	<b>TV expenditure CHF (000s)</b>
Food	185,541
Cosmetics	158,614
Various ads	94,758
Telecommunications	78,437
Finance	67,564
Beverages	64,761
Cars	59,913
Detergents	53,847
Leisure/sport/tourism	28,290
Consumer electronics	26,170

Source: Media Focus 07

**Top television owners (2007)**

<b>Owner</b>
SRG (public)
IP Multimedia

Source: ZenithOptimedia records

**Top television sales houses (2007)**

<b>Sales house</b>
Publisuisse (SRG)
IP Multimedia
Publicitas Cinecom

Source: ZenithOptimedia records



# NEWSPAPERS

## Newspapers

d=daily w=weekly n=national R=regional F=free Title	Circulation (000s)	Adult readership (000s)	Full page B/W CHF	Adult CPT B/W CHF	Full page Colour CHF
<b>German-speaking area</b>					
20 Minuten (d, N, F)	526	1,296	39,350	30.4	39,350
SonntagsBlick (w,N)	262	893	26,868	30.1	26,868
Blick (d, N)	231	650	24,539	37.8	24,539
Tages Anzeiger (d,R)	214	487	17,512	36.0	24,000
Berner Zeitung (d,R)	213	398	19,242	48.3	27,083
Mittellandzeitung	208	414	20,700	50.0	26,550
Sonntagszeitung	202	753	18,636	24.7	27,489
Neue Zürcher Zeitung(d,N)	143	291	13,970	48.0	17,910
Tagblatt Stadt Zürich (w,R,F)	140	125	4,560	36.5	6,144
Neue Luzerner Ztg. (d,R)	129	280	12,710	45.4	17,820
Aargauer Zeitung (d,R)	127	253	13,400	53.0	19,000
Südostschweiz (d,R)	127	232	16,720	72.1	18,058
NZZ am Sonntag (w,N)	126	458	14,620	31.9	21,420
St. Galler Tagblatt (d,R)	99	192	10,550	54.9	14,800
Basler Zeitung (d,R)	94	171	12,100	70.8	16,600
<b>French-speaking area</b>					
Le Matin bleu (d,N,F)	231	524	8,400	16.0	8,400
20 minutes (d,N,F)	223	470	9,400	20.0	9,400
Le Matin Dimanche (w,N)	202	544	20,400	37.5	35,850
24 heures (d,N)	86	230	14,000	60.9	24,600
Le matin semaine (d,N)	61	283	6,900	24.4	14,200
Tribune de Genève	59	150	8,930	59.5	15,500
Le Temps (d,N)	46	123	9,800	79.7	14,400
Nouvelliste Valais (d,R)	43	111	5,470	49.3	9,520
La Liberté (d,R)	39	92	5,200	56.5	7,450
L'Express (d,R)	25	59	6,030	102.2	9,900
<b>Italian-speaking area</b>					
Caffè della Domenica (w,N,F)	57	114	5,368	47.1	8,302
Mattino della dom. (w,N,F)	50	81	4,400	54.3	6,300
Corriere del Ticino (d,N)	38	118	4,708	39.9	7,588
La Regione Ticino (d,N)	33	107	4,770	44.6	7,570
Giornale del Popolo (d,N)	18	61	4,400	72.1	6,810

Source: MACH Basic 08-II

**Average CPT (B/W): CHF 38.5**

### Top ten newspaper advertisers (2007)

Advertiser	Newspaper expenditure CHF (000s)
Migros	122,712
Co-op	58,075
Swisscom	30,865
Aldi	30,128
Media Markt	24,969
Fust	22,884
Manor	19,143
UBS	17,288
Toyota	15,052
Citroen	14,482

Source: Media Focus 07

### Top ten newspaper product categories (2007)

Category	Newspaper expenditure CHF (000s)
Various ads	287,141
Cars	184,354
Finance	153,331
Services	81,751
Telecommunications	76,195
House/garden equipment	73,358
Leisure/sport/tourism	61,362
Food	52,696
Consumer electronics	42,270
Public transport	36,682

Source: Media Focus 07

### Top newspaper sales house (2007)

Sales house
Publicitas

Source: ZenithOptimedia records

# MAGAZINES

## Magazines

w=weekly f=fortnightly m=monthly q=quarterly d= daily Title	Circulation (000s)	Adult readership (000s)	Full page Colour CHF	Adult CPT Colour CHF	Full page B/W CHF
<b>German-speaking area</b>					
<b>General interest</b>					
Das Magazin (w)	477	647	23,475	36.3	23,475
Beobachter (f)	310	940	22,698	24.1	22,698
Schweizer Illustrierte (w)	209	917	26,310	28.7	26,310
NZZ Folio (m)	203	625	22,800	36.5	22,800
Schweizer Familie (w)	183	705	17,400	24.7	17,400
Reader's Digest (m)	134	342	11,520	33.7	7,990
Weltwoche (w)	85	373	15,300	41.0	15,300
Geo (m)	50	847	16,500	19.5	16,500
<b>TV</b>					
TV täglich (w)	1,200	976	23,940	24.5	23,940
TVstar	170	298	9,990	33.5	9,990
Tele (w)	145	548	16,500	30.1	16,500
Teleclub Magazin (m)	68	200	6,800	34.0	6,800
TV4 (m)	58	100	5,900	59.0	5,900
TV2 (f)	50	107	5,900	55.1	5,900
<b>Women's</b>					
Glückspost (w)	141	368	12,885	35.0	12,885
SI-Style (m)	117	406	17,100	42.1	17,100
Annabelle (f)	70	337	18,940	56.2	18,940
Joy (m)	45	162	10,300	63.6	10,300
Brigitte (f)	41	152	9,900	65.1	9,900
Freundin (f)	40	150	10,160	67.7	7,100
Cosmopolitan (m)	35	232	11,800	50.9	11,800
Bolero (m)	23	96	10,570	110.1	10,570
<b>Business/finance incl. newspapers</b>					
CashDaily (d)	117	85	7,600	89.4	7,600
Handelszeitung (w)	45	144	13,500	93.8	9,500
Bilanz (f)	41	220	14,900	67.7	14,900
Finanz+Wirtschaft (2/week)	35	122	13,440	110.2	9,900
Stocks (w)	24	51	9,850	193.1	9,850
<b>French-speaking area</b>					
<b>General interest</b>					
Illustré (w)	92	349	18,700	53.6	18,700
Paris Match (f)	50	78	6,300	80.8	4,200
L'Hebdo (w)	45	213	12,900	60.6	12,900
Reader's Digest (m)	42	104	5,380	51.7	3,275
Echo Magazin (w)	21	36	2,500	69.4	2,000

SWITZERLAND: **MAGAZINES**

**magazines (contd)**

<b>w=weekly f=fortnightly m=monthly q=quarterly d= daily</b>	<b>Circulation</b>	<b>Adult</b>	<b>Full page</b>	<b>Adult CPT</b>	<b>Full page</b>
<b>Title</b>	<b>(000s)</b>	<b>readership</b>	<b>Colour</b>	<b>Colour</b>	<b>B/W</b>
		<b>(000s)</b>	<b>CHF</b>	<b>CHF</b>	<b>CHF</b>
<b>TV</b>					
Télétop Matin (w)	202	476	19,530	41.0	19,530
TV Guide (w)	182	352	13,260	37.7	13,260
TV 8 (w)	83	213	7,200	33.8	7,200
<b>Women's</b>					
Femina (w)	201	442	22,990	52.0	22,990
Marie Claire	30	92	8,200	89.1	8,200
Edelweiss (m)	25	96	9,900	103.1	9,900
Elle	25	49	6,200	126.5	4,100
<b>Business/finance incl. newspapers</b>					
Bilan (f)	19	99	10,250	103.5	10,250
PME Magazine (m)	12	62	8,550	137.9	7,050
Agefi (d)	10	14	11,000	785.7	8,800
<b>Italian-speaking area</b>					
<b>General interest</b>					
Illustrazione Ticinese (m)	131	151	10,945	72.5	7,150
<b>TV</b>					
Ticino 7 (w)	91	148	12,090	81.7	9,100

Source: MACH Basic 08-II

**Average CPT (Colour): CHF 43.6**

### Top ten magazine advertisers (2007)

Advertiser	Magazine expenditure CHF (000s)
Migros	21,009
Co-op	14,078
L'Oréal	10,021
Beiersdorf	6,783
Die Post	5,019
Credit Suisse	4,848
Swisscom	4,822
UBS	4,551
Bank Vontobel	4,282
Clariden Leu Bank	4,280

Source: Telecontrol 07

### Top ten magazine product categories (2007)

Category	Magazine expenditure CHF (000s)
Finance	86,358
Cosmetics	48,320
Various ads	34,911
Cars	31,260
Personal care	31,228
Food	21,710
Clothes	17,743
House/garden equipment	16,138
Telecommunications	15,031
Leisure/sport/tourism	14,882

Source: Media Focus 07

# RADIO

**Number of radio households: 3,115,399 (93.4%)**

Source: Bundesamt für Statistik 2004

**Number of commercial radio stations: 52**

Source: Radio stations

**Average daily listening minutes per adult: 120.4**

Source: RadioControl 1. HJ 2008

## Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) (CHF)	Peak adult audience (000s)	30 sec peak adult CPT (CHF)
<b>Main regional</b>					
Radio 24	music	1200-1300	972	61	15.9
Radio TOP	music	1200-1300	756	44	17.3
Radio Energy Zürich	music	0700-0800	891	39	22.7
Radio Argovia	music	1200-1300	837	43	19.3
Radio Zuerisee	music	1700-1800	756	43	17.5
Radio Pilatus	music	1700-1800	786	42	18.7
Radio Central	music	0800-0900	490	31	15.7
Radio 32	music	1100-1200	648	38	17.0
Radio Lausanne FM	music	1700-1800	580	24	24.0
Radio One FM	music	0700-0800	513	23	22.4

Source: ZenithOptimedia records

**Average CPT (all commercial stations): CHF 18.6**

## Top ten radio advertisers (2007)

Advertiser	Radio expenditure CHF (000s)
Migros	4,503
Media Markt	3,969
Swisscom	3,735
Renault	3,055
Ikea	2,160
Chevrolet	2,156
Hyundai	1,950
Swisslos	1,892
Tele 2	1,797
Opel	1,758

Source: Media Focus 07

## Top ten radio product categories (2007)

Category	Radio expenditure CHF (000s)
Cars	29,528
Various ads	20,887
House/garden equipment	15,479
Telecommunications	12,317
Leisure/sport/tourism	10,963
Services	10,888
Finance	6,490
Industry/trade	4,754
Public transport	3,978
Clothes	3,218

Source: Media Focus 07

## Top radio owner (2007)

Owner
SRG

Note: Owners of local radio stations are mostly print houses

## Top radio sales houses (2007)

Sales house
IP Multimedia
Radiotele
Mediasense
Spot Promotion
Cover Media

Source: ZenithOptimedia records

# OUTDOOR

**Number of outdoor sites: 100,000 (approx.)**

## Type, size and cost of sites

Type/size of display	Number of sites	Cost per panel per month (CHF)
F12 (264 x 123.5cm)	36,000	1,100
F200NP (116 x 166cm)	14,500	950
F200L (116 x 166cm)	6,500	1,300
F4 (89.5 x 128cm)	40,000	80
F24 (268.5 x 256cm)	1,000	2,500
Megaposters	various	50,000-80,000

Source: Providers' info

## Top ten outdoor advertisers (2007)

Advertiser	Outdoor expenditure CHF (000s)
Migros	17,117
Co-op	16,313
Swisscom	13,188
Art & culture (var.)	10,928
Ikea	6,570
SVP	6,515
Nestlé	6,327
Axa Winterthur	5,889
Hennes & Mauritz	5,882
PKZ Burger-Kehl	5,736

Source: Media Focus 07

## Top ten outdoor product categories (2007)

Category	Outdoor expenditure CHF (000s)
Various ads	81,073
Finance	46,395
Cars	40,722
Clothes	33,242
Telecommunications	30,497
Leisure/sport/tourism	23,961
Food	23,264
Beverages	18,300
Services	15,418
Public transport	15,025

Source: Media Focus 07

## Top outdoor contractors (2007)

Contractor	Outdoor revenue market share (%)
APG	65
Clear Channel Plak.	34
all others	1

Source: ZenithOptimedia estimates



# CINEMA

**Number of cinema screens: 556**

*Source: ProCinema*

**Average cost of a 60 sec. spot per screen per week: CHF 370**

*Source: Cinecom*

**Average CPT: CHF 255**

**Number of screens used in typical national campaign: 486**

*Source: Cinecom*

## Trend in admissions

	Admissions (mill)
2002	18.8
2003	17.0
2004	17.7
2005	15.4
2006	16.8

*Source: ProCinema*

## Cinema audience profile

<b>Age</b>	<b>%</b>
16-24	21.7
25-34	20.8
35-49	29.8
50+	21.0
<b>Sex</b>	<b>%</b>
Male	46.9
Female	53.1
<b>Income (CHF)/Class</b>	<b>%</b>
< 3,999	11.3
4,000-7,999	43.6
> 8,000	45.1

*Source: MACH Basic 2008-II*

### Top ten films (2007)

Film	Visitors
Ratatouille	741,719
Pirates of the Caribbean 3	624,497
Harry Potter 5	529,767
The Simpsons Movie	449,547
Shrek the Third	436,792
Mr. Bean's Holiday	349,242
Spider-Man 3	332,920
Ocean's Thirteen	270,271
Die Hard 4.0	258,455
The Bourne Ultimatum	241,184

Source: ProCinema

### Top ten cinema advertisers (2007)

Advertiser	Cinema expenditure CHF (000s)
Migros	3,030
Axpo	1,792
Mars	1,753
Feldschloesschen	1,562
Swisscom	1,461
Nestlé	1,410
Opel	1,189
Sunrise	891
McDonald's	885
Philip Morris	885

Source: Media Focus 07

### Top ten cinema product categories (2007)

Category
Various ads
Food
Telecommunications
Cars
Beverages
Finance
Industry/trade
Leisure/sport/tourism
Energy
Cosmetics

Source: Media Focus 07

### Top ten cinema distributors (2007)

Owner	Market share (%)
Walt Disney Motion Picture	21.9
Universal	18.8
Warner Brothers	17.5
Fox	11.0
Elite	6.7
Monopole Pathé Films	6.6
Frenetic	5.3
Filmcoopi	3.3
Rialto	1.6
Xenix	1.2

Source: ProCinema

### Top cinema sales house (2007)

Sales house	Cinema revenue CHF (000s)
Publicitas Cinecom	37,000

Source: Werbestatistik Schweiz

# INTERNET

**Adult internet users: 5,299,000 (88.9%)**

**Adult internet users with home broadband: 1,715,000**

**Typical monthly cost of internet access: CHF 45**

## Cost of display ads

Type	Typical cost per thousand (CHF)
Fullbanner	50
Rectangle	90
Skyscraper	100
Leaderboard	100
Floating/exp. banner	150
Wallpaper	150

Source: Zed Digital

## Top ten search keywords

Keyword	Typical cost per click (CHF)
youtube	0.34
video	0.79
google	0.47
wikipedia	0.38
wetter	0.57
swiss	1.09
sbb	0.51
test	0.76
msn	0.42
meteo	0.46

Source: google.ch, Sept. 08

## Internet user profile

Age	%
14-19	11.0
20-29	19.0
30-39	25.0
40-49	20.0
50+	25.0
Sex	%
Male	54.0
Female	46.0
Income (CHF)/Class	%
<2,000	2.8
2,001-4,000	6.6
4,001-6,000	9.5
6,001-8,000	15.1
8,001-1,0000	10.7
10,001-15,000	10.7
>15,000	5.3
declined to answer	39.3

Source: NetMetrix Profile 2008-1

## SWITZERLAND: INTERNET

### Top ten internet sites (2007)

Site	Unique visitors per month
Bluewin	3,729,000
search.ch	2,512,000
directories.ch	1,771,000
Scout24	1,683,000
Blick Online	1,540,000
NZZ Online	1,405,000
20minuten.ch	1,383,000
moneyhouse	1,314,000
Netlog	968,000
homegate.ch	814,000

Source: Media Focus August 08

### Top search engines (2007)

Search engine	Market share (%)
Google	80
MSN	8
Search.ch	5
bluewin.ch	5
others	2

Source: AdLink Media

### Top ten internet advertisers (2007)

Advertiser	Internet expenditure CHF (000s)
Swisscom	2,544
Dell	2,016
Migros	1,510
Swiss International	1,421
Cablecom	1,306
Co-op	1,216
Swisslos	1,013
Corner Bank	1,008
Post Office	847
Hewlett Packard	822

Source: Media Focus 07

### Top ten internet product categories (2007)

Category	Internet expenditure CHF (000s)
Finance	9,465
Telecommunications	5,971
Industry/trade	5,846
Various ads	5,431
Services	4,974
Public transport	4,044
Cars	3,813
Leisure/sport/tourism	3,804
IT/office	3,475
Consumer electronics	1,666

Source: Media Focus 07

### Top internet owners (2007)

Owner
Swisscom
TA Media
Edipub
Ticinoonline
Google
Search
MSN
Tillate
Ringier

Source: Zed Digital estimate

### Top internet sales houses (2007)

Sales house
Adlink
Admazing
Web2Com
Uphighmedia
Tradedoubler
Vadiannet

Source: Zed Digital estimate

## MEDIA REACH

### % reach by medium (adults)

	Daily	Weekly	Monthly
Conventional television	70.0	81.5	92.8
Newspapers	84.0	94.5	97.0
Magazines	-	91.5	93.0
Radio	90.2	90.5	90.6
Outdoor	60.0	85.0	95.0
Cinema	-	4.3	17.0

Source: Telecontrol, Radiocontrol, MACH Basic, SPRplus

## OVERALL

### Top ten overall advertisers (2007)

Advertiser	Media expenditure CHF (000s)
Migros	306,395
Co-op	206,699
Swisscom	76,480
L'Oréal	61,317
Nestlé	59,155
Unilever	40,657
Media Markt	36,714
UBS	34,270
Procter & Gamble	31,823
Post Office	31,222

Source: Media Focus 07

### Top ten overall product categories (2007)

Category	Media expenditure CHF (000s)
Various ads	613,909
Finance	389,737
Cars	377,769
Food	348,622
Cosmetics	257,027
Telecommunications	233,614
Leisure/sport/tourism	197,641
House/garden equipment	182,618
Services	177,665
Beverages	144,123

Source: Media Focus 07

# UK

## ECONOMIC DATA

### Main economic indicators 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
1 US\$ = 0.50 £ at 2007 rate								
<b>Gross Domestic Product (£ billion)</b>								
at current prices	959	1,003	1,056	1,118	1,184	1,234	1,304	1,385
% change	5.8	4.6	5.2	5.9	5.9	4.2	5.7	6.2
at 2007 prices	1,163	1,195	1,237	1,274	1,310	1,327	1,359	1,385
% change	2.8	2.7	3.5	3.0	2.8	1.3	2.4	1.9
<b>Gross Domestic Product per capita (£ 000s)</b>								
at current prices	16.3	17.0	17.8	18.7	19.8	20.5	21.5	22.8
at 2007 prices	19.8	20.2	20.8	21.3	21.8	22.0	22.5	22.8
<b>Gross Domestic Product (US\$ billion)</b>								
at current prices	1,920	2,009	2,114	2,239	2,371	2,470	2,610	2,773
at 2007 prices	2,329	2,392	2,477	2,550	2,622	2,657	2,720	2,773
<b>Gross Domestic Product per capita (US\$ 000s)</b>								
at current prices	32.6	34.0	35.6	37.5	39.5	41.0	43.1	45.6
at 2007 prices	39.6	40.5	41.7	42.7	43.7	44.1	45.0	45.6
<b>Population</b>								
Millions	58.9	59.1	59.4	59.7	60.0	60.2	60.5	60.8
<b>Consumer Price Index</b>								
2007=100	82.4	84.0	85.3	87.8	90.4	93.0	96.0	100.0
% change	2.9	1.8	1.6	2.9	3.0	2.8	3.2	4.2
<b>Ad.spend as a % of GDP</b>								
	1.10	1.01	0.96	0.93	0.96	0.96	0.92	0.92
<b>Advertising Expenditure Growth (%)</b>								
at current prices	9.5	-4.4	0.3	2.9	9.3	3.4	1.6	6.4
at 2007 prices	6.4	-6.1	-1.4	0.0	6.1	0.5	-1.5	2.1

Source: IFS, ZenithOptimedia

# ADVERTISING EXPENDITURE

## Advertising expenditure in £ million at current prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	8,300	3,305	1,508	2,678	302	75	425	7
1998	9,107	3,581	1,639	2,912	355	82	521	17
1999	9,665	3,803	1,643	3,121	395	105	552	46
2000	10,578	4,263	1,725	3,327	453	108	593	111
2001	10,114	4,165	1,692	3,010	414	138	575	120
2002	10,139	4,087	1,600	3,144	419	151	596	142
2003	10,435	4,135	1,565	3,173	447	151	668	295
2004	11,403	4,341	1,624	3,392	463	162	721	700
2005	11,786	4,170	1,607	3,455	443	188	762	1,161
2006	11,978	3,992	1,554	3,282	458	188	792	1,713
2007	12,743	3,976	1,494	3,380	466	207	828	2,391

## Advertising expenditure in £ million at constant 2007 prices

	Total	News- papers	Magaz- ines	TV	Radio	Cinema	Outdoor	Internet
1997	10,884	4,334	1,978	3,512	396	98	557	9
1998	11,542	4,538	2,077	3,691	450	104	660	22
1999	12,065	4,747	2,051	3,896	493	131	689	57
2000	12,832	5,171	2,092	4,036	549	131	719	134
2001	12,047	4,961	2,015	3,585	493	164	685	143
2002	11,883	4,790	1,875	3,685	491	178	698	167
2003	11,887	4,711	1,783	3,615	509	173	761	336
2004	12,609	4,800	1,796	3,751	512	179	797	774
2005	12,675	4,484	1,728	3,715	476	202	819	1,248
2006	12,483	4,160	1,619	3,420	477	196	825	1,785
2007	12,743	3,976	1,494	3,380	466	207	828	2,391

Source: Advertising Association

Notes: 1. After discounts

2. Excludes production costs, except for cinema and outdoor

3. Excludes 15% agency commission

4. Includes classified advertising

### Main advertising restrictions:

**Tobacco:** Banned.

**Alcohol:** Restricted on television and cinema.

**Pharmaceutical:** OTC only in main media: restricted on television and radio.

**Children's:** Restricted on television, radio and cinema.

# POPULATION

<b>Land area (km<sup>2</sup>)</b>	241,590
<b>Capital city</b>	London
<b>Language</b>	English
<b>Currency</b>	Pound Sterling (£)

Source: CIA Factbook 2008

## Population by age

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
0-15	5,871	5,586	11,457
16-24	3,509	3,385	6,894
25-34	3,828	3,895	7,723
35-44	4,557	4,670	9,227
45-54	3,942	4,045	7,987
55-64	3,542	3,690	7,232
65+	4,141	5,216	9,357
<b>Total</b>	<b>29,390</b>	<b>30,487</b>	<b>59,877</b>

Source: BARB Establishment Survey June 2007

## Adult status

	<b>Male (000s)</b>	<b>Female (000s)</b>	<b>Total (000s)</b>
AB	5,373	5,287	10,660
C1	6,487	7,240	13,727
C2	5,389	4,669	10,058
D	3,893	4,040	7,933
E	2,377	3,664	6,041
<b>Total</b>	<b>23,519</b>	<b>24,900</b>	<b>48,419</b>

Source: BARB Establishment Survey June 2007

### Definition of adult status:

- AB = higher and intermediate managerial
- C1 = supervisory/clerical
- C2 = skilled manual
- D = semi and unskilled manual
- E = subsistence/inactive



# TELEVISION

**Number of households: 26,176,000**

**Number of television households: 25,541,000 (97.6%)**

**Television homes with:**

Colour	100%
VCR	59.0%
Teletext	90.0%
Cable (pass)	50.0%
Cable (connection) - total	13.6%
Digital cable (connection)	12.7%
Digital satellite dish	36.0%
Solus DTT	37.4%
IPTV	0.2%

Source: BARB, ZenithOptimedia estimates

**TV licence cost per year: £135.50**

**Average minutes viewed per day per adult: 233**

**Average pay-TV subscription cost (per month):**

	Average subscription £
Cable (digital)	42*
DTH (digital)	35

Source: Agency records \* includes broadband and telephone

**Main channels**

Channel	Technical penetration (%)	Daily hours of transmission	Ad mins per week
<b>Non-commercial</b>			
BBC1	100	24	-
BBC2	100	24	-

## UK: TELEVISION

### Main channels

Channel	Technical penetration (%)	Daily hours of transmission	Ad mins per week
<b>Commercial</b>			
ITV1	100	20.5	1,005
Channel 4	100	24.0	1,176
GMTV	100	3.5	172
Five	92	24.0	1,176
Sky1	48	24.0	1,512
Sky2	48	24.0	1,512
Sky3	86	24.0	1,512
Sky News	86	24.0	1,512
Sky Sports 1	48	24.0	1,512
Sky Sports 2	48	24.0	1,512
Sky Sports News	86	24.0	1,512
E4	86	24.0	1,512
Hallmark	48	24.0	1,512
ITV2	86	19.5	1,512
ITV3	86	24.0	1,512
ITV4	86	23.8	1,512
Living	48	24.0	1,512
More4	86	18.3	1,512
G.O.L.D.	48	24.0	1,512

Source: BARB, ATR

### Cost/audience

Channel	Peak time	Peak rate 30 sec (£)	Peak audience (000s) Adults	30 sec peak CPT (£) Adults
ITV1	2000-2259	36,637	4,168	8.8
Channel 4	2000-2259	19,274	1,987	9.7
GMTV	0600-0930	3,875	692	5.6
Five	2000-2259	8,388	1,250	6.7
Multichannel	2000-2259	35,892	5,232	6.9

Source: BARB, SPC, Agency estimates

**Average CPT (all commercial channels): £7.81**

## UK: TELEVISION

### Share of viewing & ad revenue

Channel	Share of viewing (%)	Ad revenue
	2007 Individuals	2007 £ (mill)
<b>Non-commercial</b>		
BBC1	22.0	-
BBC2	8.5	-
<b>Commercial</b>		
ITV1	17.9	1,365
Channel 4	8.6	679
GMTV	1.3	57
Five	5.1	287
Multichannel	36.6	992

Source: BARB, ZenithOptimedia

### Top ten television programmes (2007)

Programme	Channel	Adult TVR
EastEnders	BBC1	25.7
The Vicar of Dibley	BBC1	25.4
Coronation Street	ITV1	25.4
Coronation Street	ITV1	24.9
Coronation Street	ITV1	24.8
Rugby World Cup 2007	ITV1	24.7
Coronation Street	ITV1	24.0
Coronation Street	ITV1	24.0
Concert for Diana	BBC1	24.0
Coronation Street	ITV1	23.7

Source: BARB, Infosys

### Top ten television advertisers (2007)

Advertiser	TV expenditure £ (mill)
Procter & Gamble	145.7
Unilever	90.5
Reckitt Benckiser	87.5
Kelloggs	61.6
COI Communications	54.3
Nestlé	48.7
L'Oréal Paris	42.7
Tesco	39.9
Marks & Spencer	37.0
Vauxhall Motors	34.9

Source: NMR

### Top ten television product categories (2007)

Category	TV expenditure £ (mill)
Finance	462.9
Entertainment & the media	454.5
Food	445.2
Cosmetics & toiletries	356.6
Motors	335.1
Retail	325.5
Pharmaceutical	207.6
Household stores	197.0
Drink	193.5
Household equipment	153.9

Source: NMR

# NEWSPAPERS

## Newspapers - national

Title	Circulation (000s)	Adult readership (000s)	Full page B/W £	Adult CPT B/W £	Full page Colour £
<b>Popular dailies</b>					
The Sun	3,210	7,931	40,159	5.1	50,975
Daily Mirror	1,513	3,868	29,000	7.5	36,800
Daily Star	723	1,690	-	-	-
Daily Record	394	1,139	9,980	8.8	12,974
<b>Popular Sundays</b>					
News of the World	3,265	8,407	41,816	5.0	56,180
Sunday Mirror	1,367	4,273	30,300	7.1	38,600
The People	669	1,664	23,100	13.9	29,500
Sunday Mail	488	-	-	-	-
Daily Star - Sunday	382	984	20,769	21.1	28,014
Sunday Sport	87	-	-	-	-
<b>Mid-market dailies</b>					
Daily Mail	2,314	5,239	32,508	6.2	45,612
Metro	1,364	2,544	28,750	11.3	36,105
Daily Express	753	1,687	-	-	31,500
Evening Standard	295	689	20,160	29.3	30,240
<b>Mid-market Sundays</b>					
Mail on Sunday	2,330	5,818	39,300	6.8	55,800
Sunday Express	704	1,941	-	-	-
Sunday Post	412	944	10,670	11.3	12,804
<b>Quality dailies</b>					
The Daily Telegraph	890	2,054	46,000	22.4	59,000
The Times	634	1,672	16,645	10.0	27,195
Financial Times	452	375	39,600	-	55,200
The Guardian	378	1,193	11,400	9.6	18,000
The Independent	251	787	8,570	10.9	13,050
The Herald	68	270	11,500	42.6	14,950
The Scotsman	56	229	5,410	23.6	6,763
<b>Quality Sundays</b>					
The Sunday Times	1,231	3,425	60,690	17.7	90,065
The Sunday Telegraph	634	1,755	34,000	19.4	42,000
The Observer	445	1,372	13,933	10.2	22,000
The Independent on Sunday	237	818	8,570	10.5	13,050
Scotland on Sunday	76	257	11,881	46.2	14,851
Sunday Herald	52	202	3,570	17.7	4,641

Source: ABC

**Average CPT (B/W): £10.30**

## UK: NEWSPAPERS

### Newspapers - regional

Title	Circulation (000s)
<b>Dailies</b>	
Express & Star (West Midlands)	144
Liverpool Echo	110
Manchester Evening News	87
Belfast Telegraph	84
Aberdeen Press & Journal	82
Glasgow Evening Times	79
Newcastle-Upon-Tyne Evening Chronicle	76
Dundee Courier & Advertiser	75
Shropshire Star	74
Leicester Mercury	73
Birmingham Mail	71
Eastern Daily Press (Norwich)	66
Hull Daily Mail & Sports Mail	60
Yorkshire Evening Post (Leeds)	57
Aberdeen Evening Express	55
<b>Sundays</b>	
Northern Ireland - Sunday Life	75
Scotland on Sunday	73
Newcastle-Upon-Tyne Sunday Sun	69
Sunday Mercury	59
Wales on Sunday	42
<b>Free weeklies</b>	
Nottingham & Long Eaton Topper	212
Nottingham Recorder	150
Wirral Globe	134
Edinburgh Herald & Post	133
The Coventry Times	122
Coventry Observer	122
The Press Series	115
Derby Express Series	111
The Glasweigan	106
Sutton Guardian	105

Source: ABC

### Top ten national newspaper advertisers (2007)

Advertiser	Newspaper expenditure £ (mill)
British Sky Broadcasting	41.0
Argos	27.5
DFS Furniture	27.4
Tesco	23.5
Asda Stores	23.5
Dell Computer Corporation	22.6
Currys Group	22.0
Wm Morrison	19.6
Sainsbury's	19.4
B&Q	18.0

Source: NMR Medialog

### Top ten national newspaper product categories (2007)

Category	Newspaper expenditure £ (mill)
Vehicles	120.6
Household	111.2
Furniture & fittings	93.0
Direct response	73.0
Telecoms - consumer	63.0
Retail general	50.7
Airlines	47.2
Holidays/overseas	46.5
Entertainment - broadcasting	43.7
Home entertainment	34.5

Source: NMR Medialog

### Top ten regional newspaper advertisers (2007)

Advertiser	Newspaper expenditure £ (mill)
DFS Furniture	7.0
ZZZ Small Ads	5.0
Temps L	4.0
Flybe	3.5
COI Communications	3.2
Lidl	3.0
Specsavers Optical Group	2.7
Hatfields Furnishing Showroom	2.2
Wm Morrison	2.0
Arnold Clark Motors	1.8

Source: NMR Medialog

### Top ten regional newspaper product categories (2007)

Category	Newspaper expenditure £ (mill)
Household	43.5
Furniture & fittings	28.8
Retail general	22.4
Home improvement	18.1
Motor dealers	17.1
Education	15.1
Entertainment - other	14.6
Health & fitness	13.3
Entertainment - museum & arts	12.4
Airlines	9.2

Source: NMR Medialog

### Top ten regional newspaper owners (2007)

Owner	% of total circulation
Trinity Mirror	17.5
Newsquest Media Group	14.9
Johnston Press	14.3
Associated Newspapers	14.2
Northcliffe Media	12.2
Archant	3.9
Guardian Media Group	3.9
The Midland News Association	3.1
D.C. Thomson	3.0
Tindle Newspapers	2.2

Source: NS, ABC, VFD, Independent audit figures

### Top ten regional newspaper sales houses (2007)

Owner	% of market share
Mediaforce London	20.3
AMRA	18.1
Newsquest Media Sales	15.0
Associated Newspapers	14.2
Northcliffe Media	13.6
Clacksons	7.1
Scottish Daily Record & Sunday Mail	4.7
MEN Media Sales	3.1
D. C. Thomson	1.6
Kent Messenger Group (London)	1.2

Source: NS October 2007

# MAGAZINES

## Magazines

Title	Circulation (000s)	Adult readership (000s)	Full page Colour £	Adult CPT Colour £
<b><i>Women's weekly</i></b>				
Take a Break	1,001	3,170	22,920	7.2
OK! Magazine	683	2,515	16,170	6.4
Closer	549	1,486	18,618	12.5
Heat	533	2,008	21,735	10.8
Chat	519	1,450	10,774	7.4
Now	470	1,091	18,000	16.5
New!	465	552	13,475	24.4
That's Life!	460	1,038	10,900	10.5
Pick Me Up	426	1,134	8,900	7.8
Woman	371	913	19,050	20.9
Love it!	367	738	9,000	12.2
Woman's Weekly	367	889	12,400	14.0
Woman's Own	349	1,170	23,650	20.2
People's Friend	335	661	6,500	9.8
Best	331	787	18,845	24.0
Reveal	326	791	14,275	18.0
Real People	269	453	8,900	19.6
Grazia	227	567	10,800	19.1
Bella	222	1,016	18,150	17.9
Inside Soap	200	696	4,000	5.7
My Weekly	163	469	6,100	13.0
Full House!	157	334	5,000	15.0
<b><i>Women's monthly &amp; lifestyle</i></b>				
Asda Magazine	2,910	5,318	28,448	5.3
Boots Health&Beauty	1,600	2,913	30,200	10.4
Your M & S Magazine	1,250	4,404	25,700	5.8
Sainsbury's Magazine	1,197	3,518	11,760	3.3
Debenhams Desire	747	663	21,000	31.7
Glamour	550	1,197	20,674	17.3
Cosmopolitan	460	1,775	18,296	10.3
Hello!	406	2,108	16,455	7.8
Woman and Home	336	778	12,500	16.1
Marie Claire	330	1,167	16,500	14.1
Candis	300	436	6,995	16.1
Prima	290	683	16,220	23.8
Company	250	634	10,040	15.8
Red	224	680	12,197	17.9
Vogue	220	1,245	22,200	17.8
ELLE	203	862	11,900	13.8

UK: MAGAZINES

**Magazines cont.**

<b>Title</b>	<b>Circulation (000s)</b>	<b>Adult readership (000s)</b>	<b>Full page Colour £</b>	<b>Adult CPT Colour £</b>
<b><i>Women's monthly &amp; lifestyle</i></b>				
WI Life	202	187	11,775	62.8
Easy Living	196	285	13,320	46.7
In Style	180	328	16,656	50.7
She	176	431	9,460	22.0
Eve	168	290	9,580	33.1
Psychologies	140	270	7,800	28.9
Harper's Bazaar	109	191	11,339	59.3
Zest	102	200	5,450	27.3
Vanity Fair	99	253	10,270	40.5
Essentials	94	166	7,700	46.4
Tatler	91	209	10,200	48.9
<b><i>Teenage/young women's</i></b>				
Sugar	157	501	10,962	21.9
Bliss	130	511	7,800	15.3
Top of the Pops	125	223	9,500	42.7
<b><i>Men's lifestyle</i></b>				
FHM	315	2,100	21,000	10.0
Nuts	270	1,232	10,120	8.2
Men's Health	240	1,003	8,865	8.8
Zoo	179	924	8,800	9.5
GQ	130	553	11,300	20.4
Loaded	115	959	10,415	10.9
Stuff	97	339	7,325	21.6
Viz	88	447	6,750	15.1
Maxim	78	531	6,825	12.8
Men's Fitness	66	464	4,000	8.6
Esquire	60	173	8,685	50.2
Bizarre	50	303	4,500	14.8
<b><i>News &amp; current affairs</i></b>				
Reader's Digest	661	1,968	24,500	12.4
National Geographic Magazine	359	1,975	22,045	11.2
Private Eye	208	832	5,550	6.7
The Economist	181	490	17,300	35.3
New Scientist	113	445	6,350	14.3
<b><i>Music</i></b>				
Mojo	106	312	4,890	15.7
Kerrang!	77	503	4,785	9.5
NME	64	455	6,590	14.5
BBC Music Magazine	47	160	4,060	25.4
Classic FM - The Magazine	41	199	4,325	21.8
Mixmag	36	191	4,005	20.9



UK: MAGAZINES

**Magazines cont.**

<b>Title</b>	<b>Circulation (000s)</b>	<b>Adult readership (000s)</b>	<b>Full page Colour £</b>	<b>Adult CPT Colour £</b>
<b>Home interest</b>				
Good Housekeeping	464	1,528	17,391	11.4
Homebase Ideas	423	630	9,000	14.3
BBC Gardeners' World Magazine	239	1,455	7,850	5.4
Ideal Home	214	1,076	10,450	9.7
Country Living	195	752	8,851	11.8
House Beautiful	175	506	8,803	17.4
House and Garden	143	785	15,855	20.2
Homes and Gardens	140	871	9,200	10.6
BBC Good Homes	127	358	8,030	22.4
25 Beautiful Homes	120	419	5,030	12.0
BBC Homes And Antiques	101	328	8,525	26.0
Living Etc	94	242	5,200	21.5
Country Homes and Interiors	87	306	5,250	17.2
Real Homes	70	270	6,000	22.2
The World of Interiors	67	172	10,500	61.2
ELLE Decoration	64	221	7,860	35.5
Period Living	53	186	3,800	20.5
Amateur Gardening	44	169	2,825	16.7
Garden News	36	123	1,900	15.5
Garden Answers	27	139	2,850	20.4
<b>TV listings</b>				
Skymag	7,263	6,898	32,200	4.7
TV Choice	1,405	1,711	17,000	9.9
What's on TV	1,387	3,686	20,160	5.5
Radio Times	1,054	2,722	18,500	6.8
TV Times Magazine	359	1,719	16,450	9.6
TV Easy	255	591	11,990	20.3
TV Quick	211	1,322	11,500	8.7
TV & Satellite Week	195	462	5,715	12.4
Total TV Guide	116	698	7,000	10.0
All About Soap	100	375	2,400	6.4

Source: ABC, NRS, Brad

**Average CPT (Colour): £11.89**

UK: MAGAZINES

**Top ten magazine advertisers (2007)**

Magazine expenditure	
Advertiser	€(mill)
Procter & Gamble	38.0
Unilever	25.9
L'Oréal	17.4
British Sky Broadcasting	13.2
Nestlé	9.0
JD Williams	8.9
Masterfoods	8.8
Shop Direct	8.4
John Lewis	7.5
Coty Prestige	7.2

Source: NMR

**Top ten magazine product categories (2007)**

Magazine expenditure	
Category	€(mill)
Cosmetics & toiletries	156.4
Clothing & accessories	111.1
Entertainment & the media	95.6
Leisure equipment	77.0
Motors	76.6
Food	72.5
Mail order	70.4
Household equipment	53.5
Telecoms	42.7
Retail	40.4

Source: NMR

**Top ten TV listings magazine product categories (2007)**

Magazine expenditure	
Category	€(mill)
Mail order	14.0
Entertainment & the media	9.0
Telecoms	6.7
Finance	4.8
Motors	2.5
Food	2.2
Household equipment	1.9
Retail	1.6
Travel & transport	1.6
Govt, social & political orgs	1.5

Source: NMR

**Top ten women's magazine product categories (2007)**

Magazine expenditure	
Category	€(mill)
Cosmetics & toiletries	125.6
Clothing & accessories	75.1
Food	48.4
Entertainment & the media	22.3
Telecoms	20.0
Pharmaceutical	16.4
Retail	16.3
Household stores	16.0
Mail order	15.6
Drink	13.5

Source: NMR

# RADIO

**Number of commercial radio stations: 298 (analogue)**

Source: Ofcom

**Number of radio households: 26,176,000 (100%)**

**Average adult listening minutes per day: 191**

Source: RAJAR

## Costs/audiences

Station	Type	Peak time	Peak rate (30 sec) £	Peak audience Adults 000s	30 sec peak Adult CPT £
<b>National</b>					
Classic FM	music	0600-1000	793	334	2.4
Virgin	music	0600-1000	322	159	2.0
TalkSport	talk	0600-1000	336	222	1.5
<b>Main regional</b>					
Capital 95.8 FM	music	0600-1000	584	171	3.4
Heart 106.2	music	0600-1000	457	148	3.1
Clyde FM	music	0600-1000	160	73	2.2
Heart 100.7	music	0600-1000	232	80	2.9
Radio City FM	music	0600-1000	184	64	2.9
Kiss 100 FM	music	0600-1000	265	97	2.7
Key 103	music	0600-1000	185	57	3.3
BRMB	music	0600-1000	115	36	3.2
Smooth FM (London)	music	0600-1000	47	26	1.8
Century NE	music	0600-1000	73	34	2.1
Kiss West	music	0600-1000	44	24	1.8
Real Radio Scotland	music	0600-1000	209	99	2.1
Metro Radio	music	0600-1000	112	37	3.0

Source: Telmar Q3 2008

**Average CPT (all commercial stations): £2.50**

UK: RADIO

**Top ten radio advertisers (2007)**

Advertiser	Radio expenditure £ (mill)
COI Communications	42.9
DFS	7.6
British Sky Broadcasting	6.9
Hutchison 3G	6.5
Sainsbury's	6.4
Yell	6.2
Autoglass	6.0
BT	5.5
Nestlé	5.0
Renault	4.7

Source: NMR

**Top ten radio product categories (2007)**

Category	Radio expenditure £ (mill)
Motors	78.0
Entertainment & the media	77.4
Government institutions	77.1
Retail	73.3
Finance	47.5
Household equipment	40.2
Business services	38.2
Telecommunications	36.4
Travel & transport	28.8
Food	14.4

Source: NMR

**Top radio owners**

Owner	(Not ranked)
Bauer Radio	
GCap Media	
Global Radio	
GMG Radio Holdings	
The Local Radio Company	
Tindle Radio	
UKRD	
UTV Radio	

Source: ZenithOptimedia

**Top radio sales houses**

Sales house	(Not ranked)
Bauer Radio	
First Radio Sales	
GCap Media	
Global Radio	
talkSPORT	
Tindle Radio Channel Islands	
UBC Media	
Virgin Radio Sales	

Source: ZenithOptimedia

# OUTDOOR

**Number of outdoor sites: 125,716**

## Size/distribution/cost of sites

Size/type	Number of sites	Cost per panel per two weeks (£)
<b>Roadside</b>		
4 sheets	1,558	-
6 sheets	74,230	125
16 sheets	797	-
48 sheets	24,216	350
96 sheets	3,298	900
Other	21,617	-

Source: Postar Feb 2008, Meridian, Posterscope

## Top ten outdoor advertisers (2007)

Advertiser	Outdoor expenditure (£ (mill))
British Sky Broadcasting	18.8
Vodafone	18.0
COI Communications	16.1
Virgin Media	16.0
T-Mobile Network	12.7
O2	12.3
Orange	11.9
Muller Dairy	11.7
Interbrew	11.0
Warner Bros Distributors	10.6

Source: NMR

## Top ten outdoor product categories (2007)

Category	Outdoor expenditure (£ (mill))
Entertainment & the media	171.7
Telecoms	102.4
Motors	76.4
Finance	66.0
Retail	65.4
Drink	62.0
Food	56.5
Travel & transport	53.7
Govt, social & political orgs	37.8
Business & industrial	26.6

Source: NMR

## Main outdoor contractors

Contractor	No. of panels		
	6 sheets	48 sheets	96 sheets
Clear Channel	44,873	6,288	1,449
JCDecaux	15,371	9,739	985
Primesight	12,684	85	11
Titan Outdoor	2	7,954	826

Source: Postar Feb 2008, Meridian, Posterscope estimates

**CINEMA****Number of cinema screens: 3,596***Source: CAA***Average cost of a 60 sec. spot per screen per wk: £116.70***Source: Pearl & Dean***Average CPT: £116.70****Trend in admissions**

	<b>Admissions (mill)</b>	<b>Gross takings £ (mill)</b>
2002	176	755
2003	167	742
2004	171	770
2005	165	770
2006	157	762
2007	163	-

*Source: CAA, AC Nielsen EDI***Cinema audience profile**

<b>Age</b>	<b>%</b>
15-24	38
25-34	19
35-44	18
45+	25
<b>Sex</b>	<b>%</b>
Male	48
Female	52
<b>Class distribution</b>	<b>%</b>
ABC1	67
C2DE	33

*Source: CAA, CAVIAR***Top ten films (2007)**

<b>Film</b>	<b>Gross takings £ (mill)</b>
Harry Potter and the Order of the Phoenix	49.4
Pirates of the Caribbean: At World's End	40.2
Shrek the Third	38.6
The Simpsons Movie	38.6
Spider-Man 3	33.6
Ratatouille	24.8
The Bourne Ultimatum	23.7
Transformers	23.3
Mr. Bean's Holiday	22.1
Hot Fuzz	21.0

*Source: ACNielsen EDI*

### Top ten cinema advertisers (2007)

Advertiser	Cinema expenditure £ (mill)
Orange	14.4
Unilever	7.8
Apple Computer	7.4
COI Communications	5.7
Volkswagen	4.6
Ford Motor Company	4.4
Peugeot Motor	4.2
Red Bull	4.0
Glaxosmithkline	3.9
Vodafone	3.5

Source: NMR

### Top ten cinema product categories (2007)

Category	Cinema expenditure £ (mill)
Motors	30.4
Drink	26.5
Telecomms	26.2
Computers	16.9
Entertainment & the media	14.9
Food	10.6
Govt, social & political orgs	10.1
Cosmetics & toiletries	9.1
Retail	5.1
Leisure equipment	3.7

Source: NMR

### Top ten cinema owners (2007)

Owner	Sites owned
Odeon Cinemas	108
Cineworld	72
VUE Cinemas	60
Showcase	19
City Screens	19
Empire	17
Apollo	13
Suri Curzon Cinemas	13
Ward Anderson	8
Reeltime Cinemas	7

Source: CAA

### Top cinema sales houses (2007)

Sales house	No. of screens
Carlton Screen Advertising	2,473
Pearl & Dean	1,023

Source: CAA

# INTERNET

**Homes with internet connection: 17,537,920 (67%)**

**Adult internet users: 32,000,000 (67%)**

*Source: Gfk NOP World (Dec 2006)*

**Internet users with home broadband: 90%**

*Source: BMRB Internet Monitor*

**Typical monthly cost of internet access: £10**

## Cost of display ads

Type	Typical cost per thousand (GBP)
banner	10.0
leaderboard	15.0
skyscraper	15.0
mpu	25.0
rm banner*	12.5
rm leaderboard*	17.5
rm skyscraper*	17.5
rm mpu*	27.5
pop up	20.0
overlay	35.0

*Source: ZenithOptimedia estimates 2006*

*\*Rich Media formats, incl'; expandable and video streaming*

## Top ten paid-search keywords

Keyword	Typical cost per click (GBP)
ebay	0.22
bebo	0.09
argos	0.31
amazon	0.33
easyjet	0.15
bbc	0.25
autotrader	0.26
tesco	0.90
ebay uk	0.09
cbbc	0.28

*Source: Hitwise, Google 2006*

## Internet user profile

<b>Age</b>	<b>%</b>
15-17	4
18-24	12
25-34	16
35-44	19
45-54	16
55+	33
<b>Sex</b>	<b>%</b>
Male	49
Female	51
<b>Class</b>	<b>%</b>
AB	26
C1	29
C2	21
DE	24

*Source: BMRB TGI.net Wave 15 (Oct 06-Sept 07)*



## UK: INTERNET

### Top ten internet sites (2007)

Owner	Unique visitors per month (000s)
Google	30,272
MSN/Windows Live	23,862
BBC	18,852
Yahoo!	18,694
Microsoft	17,863
Ebay	16,624
Facebook	16,144
Amazon	15,792
YouTube	14,240
AOL Media Network	11,616

Source: Nielsen NetRatings NetView Feb 2007

### Top search engines (2007)

Search engine	% of UK searches per month
Google	87.3
Yahoo!	4.1
MSN	3.7
Ask	3.1

Source: Hitwise UK May 2008

### Top ten internet advertisers (2007)

Advertiser	Internet expenditure £ (000s)
Personal Loan Express	28,518
eBay	19,801
British Sky Broadcasting	15,785
Capital One	14,736
Microsoft	14,541
Orange	13,256
Virgin Money	12,722
O2	10,428
Amazon	9,886
COI Communications	8,224

Source: NMA

### Top ten internet product categories (2007)

Category	Share of internet expenditure %
Recruitment	25.7
Auto	11.9
Technology	10.4
Finance	10.0
Property	7.9
Telecoms	6.0
Entertainment & the media	5.6
Consumer goods	5.3
Travel & transport	5.2
Retail	5.0

Source: PricewaterhouseCoopers,  
Internet Advertising Bureau, WARC

## MEDIA REACH

### % Reach by medium

	Day	Adults	
		Week	Month
Terrestrial TV	65.0	87.9	96.9
Commercial TV	66.3	89.0	97.2
Multichannel TV	51.1	75.0	84.9
Newspapers	43.8	71.9	80.7
Magazines	43.8	32.7	61.4
Radio	-	89.0	-
Cinema	-	6.0	12.7
Internet	-	63.6	67.0

Source: BARB, RAJAR, TGI, NRS

## OVERALL

### Top ten overall advertisers (2007)

Advertiser	Media expenditure £ (mill)
Procter & Gamble	206.0
COI Communications	165.6
BSkyB	162.6
Unilever	152.9
DFS	104.5
BT	94.3
Reckitt Benckiser	89.7
Orange	88.8
Tesco	83.2
Nestle	83.1

Source: NMR

### Top ten overall product categories (2007)

Category	Media expenditure £ (mill)
Retail	1,075.8
Finance	787.1
Motors	642.8
Entertainment & the media	550.1
Govt., social & political orgs.	319.0
Telecoms	312.9
Mail order	226.1
Drink	122.7
Computers	118.7
Travel & transport	104.4

Source: NMR

# GLOSSARY

<b>Circulation</b>	Number of copies sold or distributed.
<b>Cost per thousand (CPT)</b>	The average cost of reaching one thousand of the target population.
<b>IPTV</b>	Internet Protocol Television: television transmitted using internet protocols, normally over a telephone line.
<b>Peak time</b>	The period in a day in which advertising is most expensive.
<b>Penetration</b>	The proportion (%) of a given target market group reached by a medium.
<b>PVR</b>	Personal Video Recorder: hard disc recording equipment
<b>Ratecard</b>	A price-list issued by media owners for different space sizes or time lengths.
<b>Rating</b>	One rating point is one per cent of the target audience.
<b>Reach</b>	% of a given audience exposed to a given medium over a given time.
<b>Readership</b>	Having read or looked at a publication within its publishing interval.
<b>Television rating (TVR)</b>	See <b>Rating</b>
<b>TV home</b>	A household receiving television transmissions.