

APG Posters

Transparency in performance and quality

NEW SPR+ performance data

“The fascinating thing about posters is that no one goes looking for them. They simply appear to people on the street. The encounters are random. We could also say that posters somehow just captivate the observer – suddenly or surprisingly.”

Niklaus Troxler, *1947,
poster designer, Willisau/Switzerland



Strong brands . . . need exposure . . .

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Facts and figures

The poster.

The objective of advertising communication is to increase the desirability of a brand – not only within its core target group, but also in a broader context. A mass medium can do this best.

Take center stage with APG posters

APG poster networks transport you into the centers of all Swiss cities, into the hearts of the people, and thus into the minds of the consumers!

Public spaces are the hubs of mobility, and that's where we have installed our billboards for you. Along major commuter arteries, in metro areas, at all important traffic junctions, on squares, in pedestrian zones – they are homogeneously distributed throughout all Swiss target areas. Into the very hearts of the urban centers and in the downtown railway stations – at the pulse of the most active commuter flows.

A nationwide presence in the centers of Swiss cities and full service distinguish us from other providers:

- We deliver your message through maximum-frequency premium sites, thanks to master concepts, shelters, telephone booths, visitor maps, and other types of street furniture.
- Our deliverables include calculation tools for your media planning projects, 24/7 online poster network availability listings, visualization of all panels, advertising effectiveness monitoring with the APG Poster Performance Index PPI® and, and, and... free of charge for you.

NEW SPR+ performance data

We are committed to transparency. This applies to all poster networks and individual panels and is based on scientifically surveyed SPR+ contact ratings as well as market-driven CPM¹. And we offer differentiated solutions for your media strategy. Whether you are on a quest for reach and want broad coverage or whether you intend to build up massive advertising pressure and drill down deep in certain cities: we have the modules that do that and offer you maximum customer benefit.

¹ CPM = Cost per thousand:
Cost for 1,000 contacts
with a poster campaign in
a target area



Some 400,000 passers-by, commuters, pedestrians, and motorists, about 50,000 embarking and disembarking VBZ passengers every day – and 64 premium backlit panels as the gateway to the busiest shopping mile in Switzerland. Inaugurated in November 2004, the shelter at Zürich's famous Bahnhofplatz is the longest structure of its kind in Europe and a prime example for an advertising-funded service to the public. It was designed by Dürig AG, a team of architects whose project dubbed "Light Years" was the winning entry of a competition. The independent jury selected it on the basis of economical, functional, design-related, and urban architecture merits.

The mobility medium

Because we are becoming more and more mobile, we are frequently accessible only on the go. With posters.

Eight out of nine people who reside in Switzerland can be encountered "out of home" every day. Every day, every woman and every man commutes an average of 37 kilometers which takes about 88 minutes. During this time period, on the way to work, to school, to shopping venues, or for leisure, these people are accessible only en route. Slow traffic (on foot or by bicycle) accounts for almost half of this time.¹ These metrics clearly speak in favor of the poster as the most important and only plannable and monitorable out-of-home medium.



¹ Source: Swiss Federal Statistical Office, Microcensus 2005 on traffic behavior, publ. May 2007, www.statistik.admin.ch

Our media philosophy

“Switzerland votes for a new capital”. In 2007, the Affichage crossmedia campaign delivered impressive proof that eboards, cell phones, and the Internet can powerfully complement the poster as a basic medium. The results of the campaign were processed in a dissertation at the Faculty of Business Psychology of the University of Zürich. DVD incl. study: www.apg.ch/publications

Remember? – In the summer of 1999, a 14-day poster campaign transformed the totally unknown “girl next door” into the national celebrity “Angie Becker” – a representative survey confirmed that 73% of the population remembered the campaign. – Test report: www.apg.ch/publications



What you get from us is media power in the form of networks or individually configured poster campaigns. In other words: you are omnipresent, with homogeneous geographical penetration in your target area – and at all times, you have the option to spontaneously book individual panels as needed.

The poster – a basic medium with a broad impact

Nothing needs to be switched on, no log-in is required: everyone encounters posters, constantly and inevitably – again and again, until the message “clicks” in the mind. In projects with complex content, the “mobility medium” supports other campaigns with high contact ratings.¹

Sharply defined target areas

Crisply defined and structured target areas are crucial for us. We operate on the basis of WEMF regional structures, with cities as the smallest bookable network units.

The right billboards at the right places

Strict quality guidelines govern the way we procure poster sites. Concept-driven thinking and high-grade street furniture such as shelters, telephone booths, visitor maps, etc. give us access to sites that no one else can offer. We can post your message in the desired target area with contiguous coverage in all cities throughout Switzerland: all the way into the city cores, into the beat of the rushing commuter streams.

Media performance: planned and monitored

Thanks to SPR+, it is possible to accurately calculate how many panels – and which ones – are needed to generate a specified performance level. Among other factors, our poster networks are defined on the basis of contact class and reach. They guarantee high advertising impact: the average recall rating of campaigns delivered on APG poster networks is 51%.²

APG poster networks – ideally interactive

Our networks are composed of a wide variety of panel types. They are located in city centers, at traffic junctions, in congestion zones, in city railway stations, on squares and in pedestrian zones, as well as along major traffic routes all the way to residential suburbs. In their entirety and in the way they interact, the individual sites generate an optimum contribution to media impact. Relying on the insights of scientific research and with the aid of the SPR+ Expert and APGVis® planning tools, our product managers configure these networks for you: differentiated by the site characteristics of the panels³ and by target area – national, regional, and local.

Transparent reservation of addresses

Panel addresses ex quotation: As soon as you have submitted a booking and received our confirmation, the addresses are reserved for you. And you have all pertinent details: the site characteristics and prices of each panel, the posting date, the campaign duration and the terms and conditions. Moreover, our new web-based InterMediaMap tool gives you online viewability.

Instantaneous advertising pressure boost

With our poster networks, you can expect genuine impact. Billposting of your campaign in the core cities begins early in the morning and your message is out on the same day. Conurbation posting is completed on the second day.

Our poster networks are your assets

APG poster networks guarantee homogeneous distribution in all Swiss target areas – into the very hearts of the urban centers.

- They
- deliver high reach ratings
- maximize your contacts
- increase the recognition of your brand
- provide you with contiguous coverage
- protect you against clustering
- eliminate gaps
- generate high impact
- reduce your CPM
- save your money
- increase your customer frequencies
- secure revenues
- simplify your clearance sales
- consolidate your market position
- assure sustainability
- strengthen your brand

¹ Concerning the advertising impact of posters/TV, see, among others: The poster as a TV booster, awk Aussenwerbung (D, 1999), Twice seen – better retained, DSM/DEGESTA (D, 1992), Adshel Superlites communicating with people on the move, More O’Ferrall (GB, 1989)

² APG Poster Performance Index PPI®, Status December 2007

³ Site characteristics are the typical features of each panel: street, railway station, shopping center, parking facility.

Innovative and successful

Posters are liked by people, command the most attention, and are not deemed annoying.

The trend medium

Together with TV, out-of-home advertising has posted above-average growth rates for years. With a share of 16 percent of total advertising spend, Switzerland is a poster country "par excellence." The APG/Affichage innovation powerhouse can take much of the credit for this trend.

F24 large format

Introduced in 2008, the seven-square-meter F24 poster is the first medium in Switzerland that allows contiguous large-format coverage and, as a square, complements the landscape and portrait formats to create an effective format mix. At some sites, the panels are illuminated with a novel LED technology that produces a genuine backlit poster effect without stray light losses (world debut).

APG Rollingstars

At Swiss RailCity stations since 2004 and also at street/pedestrian zone sites since 2006: with fast vertical scrolling, backlit Rollingstar units with three visuals attract added attention and improve perception versus static billboards. Placed exclusively at high-frequency sites in cities, APG Rollingstars target mixed urban traffic: pedestrians, cyclists, and slowly moving motor vehicles. Our high-tech plant presents your posters backlit, uncut, and with superb brilliance.



Homogeneous and contiguous coverage in all major economic centers in Switzerland: The F24 large format is a premium product for your most ambitious expectations.



APG StarTower® – the latest out-of-home innovation in Switzerland. The elegant backlit kiosk, rotating or static, makes an exclusive statement. It is an ideal advertising medium for upscale products such as watches, jewelry, perfume, cosmetics, etc.

Rollingstar200L® – enhanced advertising impact with fast scrolling motion.





RailCity HB Zürich, main concourse – the first Rollingstar installation with F12 wide formats. The backlit 3.5-square-meter panel is located at one of Switzerland's most prominent and best-frequented sites: at the main entrance of ShopVille facing the Bahnhofstrasse. The daily pedestrian frequency here exceeds 200,000 persons.



Set at an angle of 45 to 90 degrees relative to the traffic flow direction, almost always solus sites – outside the metropolitan areas and city centers, your message is seen by people along their daily commuting routes.



APG F12 Highwaystar – in the vicinity of highway on- and off-ramps, you reach daily commuter flows from Monday to Friday, people en route to shop as well as weekend vacationers on Saturdays and Sundays. These are particularly mobile and affluent target groups.



Target areas and target groups

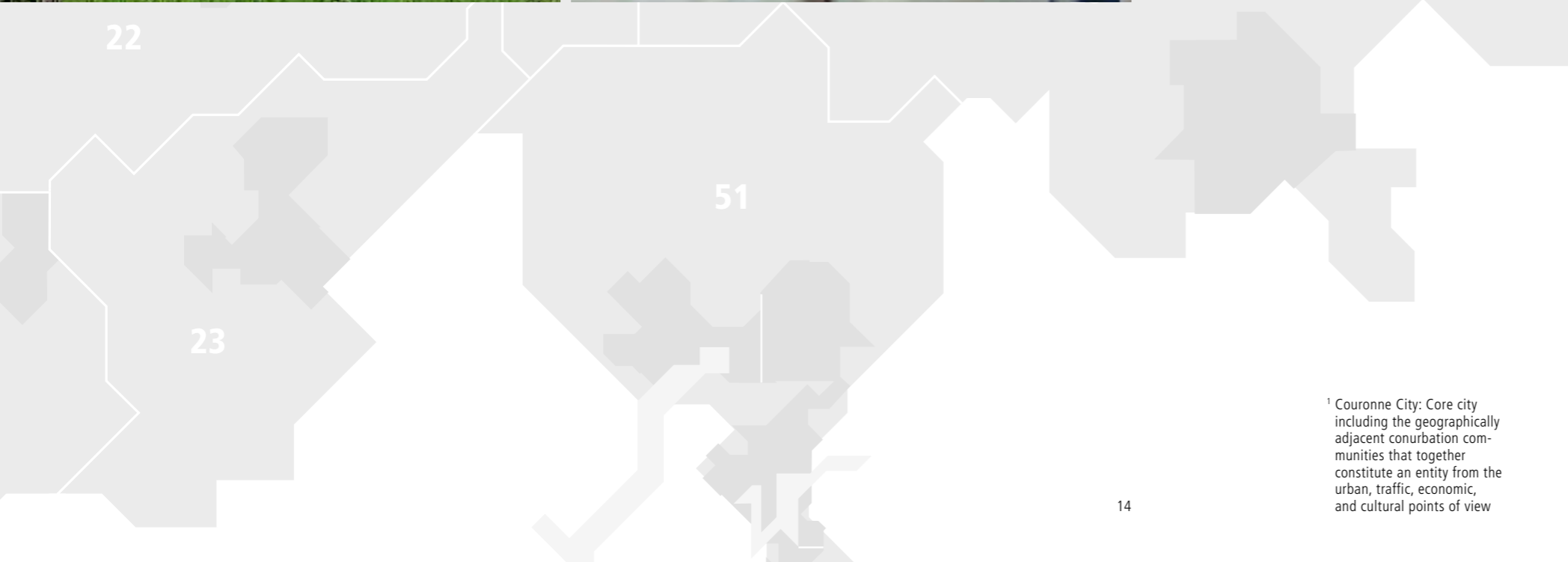


The poster lets you geographically bundle advertising clout with pinpoint accuracy. Railway stations, newsstands, shopping centers, city parking facilities or tourism settings generate extra proximity to interesting target groups or consumption situations.

The target areas relevant to billposting are subdivided into greater urban areas (conurbations), urban centers (Couronne Cities¹) and tourism regions. These areas are interconnected with classic road and rail commuter routes. Heavy commuter flows reign among others in the APGMobility[®] areas: geographically connected conurbation communities with an intensive and homogeneous mobility behavior of their populations.



Billboards along daily commuter routes: configured according to the insights of the SPR+ fundamental poster research project, APGMobility[®] areas are characterized by mixed traffic forms. The sites are seen by motorists, motorcycle and bicycle users, public transit passengers, pedestrians, etc.



¹ Couronne City: Core city including the geographically adjacent conurbation communities that together constitute an entity from the urban, traffic, economic, and cultural points of view



SBB CFF FFS

Lernen Sie das Walser kennen
www.sbb.ch/entdecken

Entdecken Sie ur

Entdecken Sie die Urschweiz.

Entdecken Sie die

Fer

Abfahrt:

| | |
|-------|-----|
| 17.30 | ICN |
| 17.32 | IE |
| 17.33 | IE |
| 17.34 | IR |
| 17.35 | IR |
| 17.36 | IR |
| 17.37 | ICN |
| 17.37 | IE |
| 17.38 | |

Coveted target groups: 92% of all employed persons are commuters. In other words, 3.4 million people who belong to Switzerland's total working population of 3.7 million do not work and live at the same place. The characteristics of the typical commuter: they are middle-aged to young, well trained, and have good incomes.

The deployment of poster advertising pushes sales by 13%; a recent study confirms the impact of posters as revenue boosters at the point of sale.

Source: Nielsen Media Research 2007, commissioned by awk Aussenwerbung, Koblenz (D), www.awk.de, also see Facts and figures: Point-of-sale posters, back cover flap



← CAISSES

Machen beliebt:
Die neuen Brillen «ZüriHorn».



GOTTE
Optik an der Bahnhofstrasse

At street locations,
posters tap into the
increasing mobility of a
growing population
and are the only true
mass medium that reach-
es all demographic
segments of the popu-
lation.

Unbiased data thanks to neutral measurements with GPS technology: the prices of our products are based on the OTS rating of every individual panel, i.e. on objectively measured and weighted SPR+ poster contacts. Developed by Swiss Poster Research Plus AG, an independent firm, the provider-neutral SPR+ Expert tool allows you to professionally plan and monitor your poster campaigns in an intermedia context. We use the same tool to configure our poster networks for you.

www.spr-plus.ch

Get there with just a few clicks. At www.apg.ch you will find everything you want to know about posters: all network profiles, all local products, information on the poster market, about the history of the poster, about poster production – in English, German, French, and Italian. A convenient feature: the expanded full-text search capability brings you to the doorstep of all companies of the Affichage media group.



Products and availability

Overview of all products in the desired target area and query of all currently available poster networks for the desired campaign duration

Planning resources

SPR+ Expert calculation of key media data for individualized coverage by target area (reach, contacts, GRP, CPM, etc.), APG PosterCheck for the superposition of visuals on selected sample poster sites in all formats, with tips and tricks

Advertising effectiveness monitoring

APG Poster Performance Index PPI®: Measurement of recall, brand recognition, and appeal with classic post-tests

Current campaigns and archive

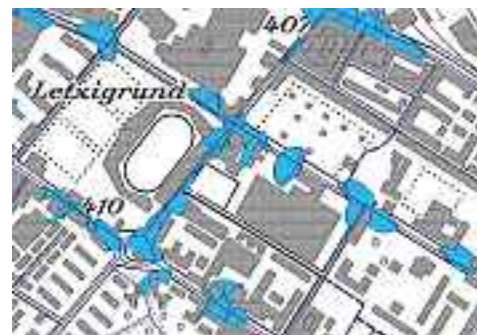
APG Poster of the Week: Poster campaigns on the Internet and repository of ideas for creatives

Documentation and publications

Detailed information, downloads, and order forms for free documentation



SPR+, the new Swiss fundamental research program, relies on GPS technology to record path data and thus measure the mobility of the population. For an entire week, every out-of-home step of volunteers equipped with a mobility meter is automatically tracked. The path data is then uploaded to a geographical information system that produces individual plots of the persons for each poster panel – weighted by panel viewing angle, passage speed, time of day, and clustering of panels at any given site. The SPR+ Expert planning tool allows individual performance calculations per poster site and poster campaign.



NEW Online transparency with InterMediaMap

InterMediaMap visualizes your poster campaign with mouse-click convenience. This Affichage tool is based on Google Maps and provides you with all relevant information – including photographs – of the panels you booked with the Affichage Group, nationally and internationally. Thus, you can experience your campaign virtually without installing any additional software.

At APG, InterMediaMap complements the APGVis® software powered by the digitized map library developed by the Swiss Federal Office of Topography. This visualization instrument launched in 2000 delivers the exact panel coordinates for SPR+ and for APG's product management team.

In brief: benefits across the board

A good poster is the benchmark for good communication. To be perceived in a sea of information, every advertising message must be as concise as possible. If the effort succeeds, the poster beats all other media in its ability to generate broad awareness or to reposition a product or a brand in virtually no time.

With an advertising impact of 67% and 60%, the out-of-home media in Switzerland – posters and transit advertising – achieve top scores. And their image in the population is excellent across all demographic segments and target groups. High acceptance and exposure of an advertising medium are known to correlate with high levels of perception and effectiveness. Five hundred campaigns tested with the APG Poster Performance Index PPI® deliver ample proof: An APG showing of average persuasion and visual design generates 51% recall, 57% brand recognition, and 60% appeal.¹

¹ Sources:
– APG Poster Performance Index PPI®, Status December 31, 2007
– Case study Lausanne mass transit system, APGTraffic 2007
– Case study Zürich mass transit system, VBZ Traffic-Media/APGTraffic 2003
– Ringier Romandie, Baromedia 1997–2002
– Youngcom! Youth study '97 (Youngcom! Youth Marketing, Munich, 1997)

APG – Your dependable partner

SPR+ performance-rated poster networks and individual panels

All network sites and individual panels offered can be reserved right away

Comprehensive planning, monitoring, and information tools

Typification of each poster panel according to characteristic site features: Street, railway station, shopping center, parking facility, etc.

Transparency with APGVis® and InterMedia Map: address, characteristics, photo, price, etc., for each individual panel

Weekly planning thanks to variable campaign durations: 7, 14, or 21 days

Easily and flexibly combinable media modules for different media strategies

Thank you

for your confidence. We look forward to the privilege of serving you.

APG

An Affichage Holding company

Information – www.

affichage.com
Affichage Group portal

Switzerland

apg.ch

Poster advertising in Switzerland

apgmontagne.ch

Advertising in the mountains

apgtraffic.ch

Transit advertising

bercher.ch

Airport advertising

ead.ch

Large-format LED displays

ecofer.ch

Railway-station outdoor advertising, non-poster

impacta.ch

Railway-station poster advertising

paron.ch

Big Posters

sportart.ch

Sports and stadium advertising

International

Bosnia-Herzegovina

europlakat.co.ba

Bulgaria

europlakat.com

Greece

affichage.gr

lastrada.com.gr

Hungary

europlakat.hu

Italy

firstavenue.it

publifutura.it

Montenegro

europlakat.com

Romania

affichage.ro

Serbia

aqyu.com

Credits

Publisher: APG Marketing
Concept and copy: Jürg Sager, Luzern
Photography: Bruno Eberli, Horw
Design: Rolf Stocker, Luzern
Typesetting, separations, printing:
UD Print AG, Luzern

Circulation
English: 800
German: 6,000
French: 1,300
Italian: 800

Printed in Switzerland
on chlorine-free bleached paper
with Ökoplus offset printing ink



Mixed Sources

Product group from well-managed forests and other controlled sources
www.fsc.org | Cert. No. SQS-COC-100038
© 1996 Forest Stewardship Council

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APGMobility®, APG PosterAward®, APGTraffic®, APGVis®, Cityplan200L®, Citystar200L®, Poster Performance Index PPI®, Rail Citystar200L®, Rollingstar200L®, Rollingstar12L® are registered trademarks.

Mobility

Mobility in Switzerland

| | 2000 | 2005 | Change |
|--|---------------------|---------|--------|
| Resident population | in 1,000 7,204 | 7,459 | + 4% |
| No. of working persons | in 1,000 3,704 | — | — |
| – workplace out of town of residence | in % 92 | — | — |
| – workplace out of district of residence | in % 58 | — | — |
| Passenger kilometers per year ¹ | in millions 106,641 | 119,014 | + 12% |
| No. of passenger rides SBB | in millions 222 | 276 | + 24% |
| No. of passenger cars | in 1,000 3,545 | 3,864 | + 9% |

¹ Approx. 80% private road traffic and 20% public transportation (this split has remained practically constant since 1975)

Sources:

- Swiss Federal Statistical Office, census, The Swiss Statistical Encyclopedia, Road vehicles in Switzerland, www.statistik.admin.ch
- LITRA, information service for public transportation, www.litra.ch
- Swiss Federal Railways SBB, www.sbb.ch

Daily mobility 2005 per person by transport mode¹

| | in km | Daily distance in % | in min. | En route time ² in % |
|-----------------------|-------|---------------------|---------|---------------------------------|
| Total | 37.3 | 100 | 88.4 | 100 |
| Car driver | 17.9 | 48 | 25.3 | 29 |
| Car passenger | 7.0 | 19 | 9.3 | 11 |
| Train | 6.0 | 16 | 5.2 | 6 |
| On foot | 2.1 | 6 | 35.1 | 40 |
| Bus/tram/postal coach | 1.7 | 4 | 4.6 | 5 |
| Bicycle | 0.8 | 2 | 4.2 | 5 |
| Other ³ | 1.8 | 5 | 4.7 | 4 |

¹ Averaged over all weekdays and all respondents (Basis = 33,000 persons 6 and older)

² En route time: Duration of trip from start time at the point of departure until arrival at the destination, without waiting and transfer times

³ Motor bike, motorcycle, tour bus, aircraft, taxi, truck, ship, resort lift

Source: Swiss Federal Statistical Office, Microcensus 2000 on traffic behavior, publ. May 2007, www.statistik.admin.ch

Media data

Media shares in Switzerland

Spending trend for classic advertising media

| | 1982 | 2007 |
|--------|-------------|-------------|
| Total | CHF m 1,817 | CHF m 3,787 |
| Poster | 164 | 663 |
| TV | 115 | 637 |
| Press | 1,538 | 2,487 |
| Index | 100 | Index 208 |
| 550 | — | — |
| 500 | — | — |
| 450 | — | — |
| 400 | — | — |
| 350 | — | — |
| 300 | — | — |
| 250 | — | — |
| 200 | — | — |
| 150 | — | — |
| 1982 | — | 2007 |

Source: Foundation for Swiss Advertising Statistics, publ. June 25, 2008

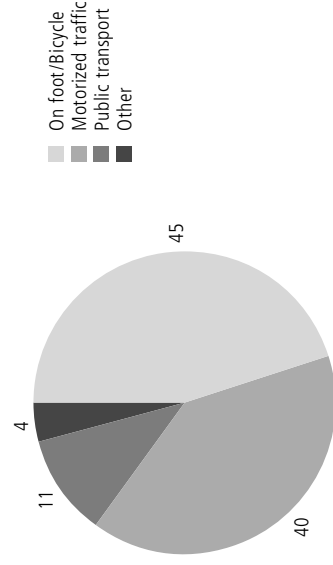
Standard poster formats

| City format | F200 | F200/LR | F200P | F12 | F12/LR | F12P | F24 | World format | F4 |
|--------------|-------|---------|-------|-------|--------|-------|-------|--------------|------|
| Paper size | 116.5 | 119 | 116 | 116.5 | 268.5 | 268.5 | 264 | 268.5 | 89.5 |
| Visible size | 170 | 170 | 166 | 170 | 268.5 | 268.5 | 264 | 256 | 128 |
| Taraulin | 170 | 170 | 170 | 128 | 128 | 128 | 123.5 | 128 | 128 |
| Paper size | 116.5 | 119 | 116 | 116.5 | 268.5 | 268.5 | 264 | 268.5 | 89.5 |
| Visible size | 170 | 170 | 166 | 170 | 268.5 | 268.5 | 264 | 256 | 128 |
| Taraulin | 170 | 170 | 170 | 128 | 128 | 128 | 123.5 | 128 | 128 |

- L Backlit poster
- LR Rollingstar
- P Poster (taraulin)

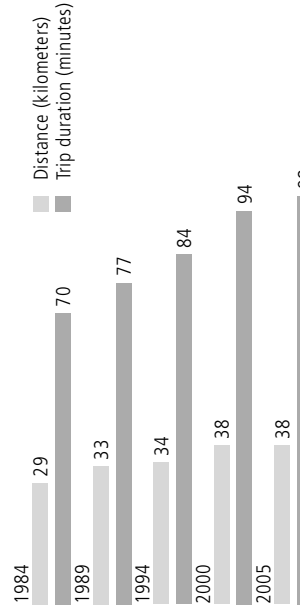
Daily en route time by transport mode

Replies in % of persons interviewed (Basis = 33,000 persons)



About 40 minutes or 45% of daily en route time are correlated with slow traffic on foot or by bicycle.

Daily distance and trip duration trend



The long-term comparison from 1984 to 2005 shows a 31% gain in distance traveled (from 29 to 38 kilometers), with an even more prominent increase of trip duration by 40% (from 70 to 98 minutes). This reflects the growing share of slow traffic (values rounded).

Trip duration: Duration of trip from start time at the point of departure until arrival at the destination, including waiting and transfer times

Daily railway station frequencies

Rail passengers and station pedestrians

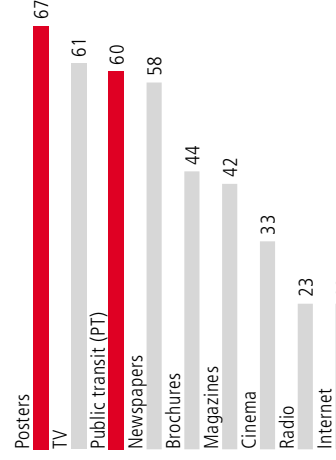
| | |
|------------------------------|---------|
| Zürich HB ¹ | 300,000 |
| Bern ¹ | 145,000 |
| Zürich Stadelhofen | 135,000 |
| Winterthur ¹ | 122,000 |
| Basel SBB ¹ | 120,000 |
| Zürich Oerlikon | 110,000 |
| Genève Cornavin ¹ | 85,000 |
| Oltén | 80,000 |
| Zürich Enge | 70,000 |
| Aarau | 65,000 |
| Lausanne ¹ | 65,000 |
| Luzern ¹ | 62,000 |
| Zug | 50,000 |
| Biel/Bienne | 45,000 |
| St.Gallen | 45,000 |
| Thun | 45,000 |
| Uster | 42,000 |
| Fribourg | 34,000 |
| Baden | 30,000 |
| Neuchâtel | 29,000 |
| Brugg | 20,000 |
| Chur | 20,000 |
| Schaffhausen | 20,000 |
| Wil SG | 20,000 |
| Rapperswil | 15,000 |
| Solothurn | 15,000 |
| Genève Aéroport | 13,000 |
| Bellinzona | 12,000 |
| Sion | 12,000 |
| Yverdon-les-Bains | 12,000 |
| Brig | 10,000 |
| Delémont | 10,000 |
| Locarno | 10,000 |
| Lugano | 10,000 |

¹ RailCity

Source: SBB, January 2008

The impact of different advertising media

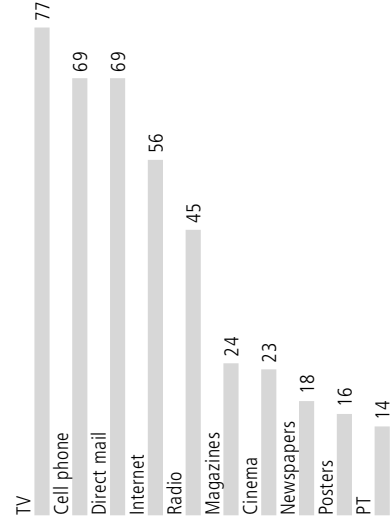
Share in % of persons interviewed (Basis = 507 persons)



Source: Demoscope Research and Marketing AG, Adligenswil/Luzern, commissioned by APGTraffic, 2007

Advertising annoying/very annoying

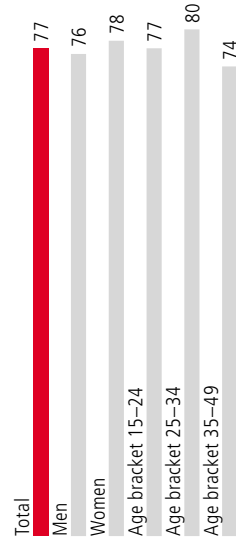
Share in % of persons interviewed (Basis = 1,285 persons)



Source: Erasm, Carouge/Genève, commissioned by SW Schweizer Werbung, 2005

Poster advertising agreeable/very agreeable

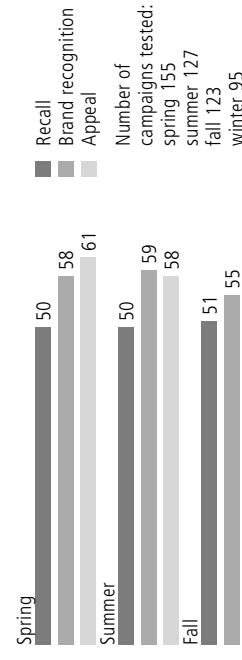
Share in % of persons interviewed (Basis = 618 persons)



Source: APG Poster Performance Index PPI®, 2005

Advertising impact of poster campaigns

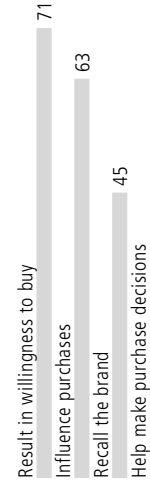
Share in % of persons interviewed



Source: APG Poster Performance Index PPI®, Status December 31, 2007

Point-of-sale posters

Share in % of persons interviewed (Basis = 804 persons)



Source: awk consumer survey 2006, Koblenz (D)