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CP Barometer

Pilot Study – Selected Results

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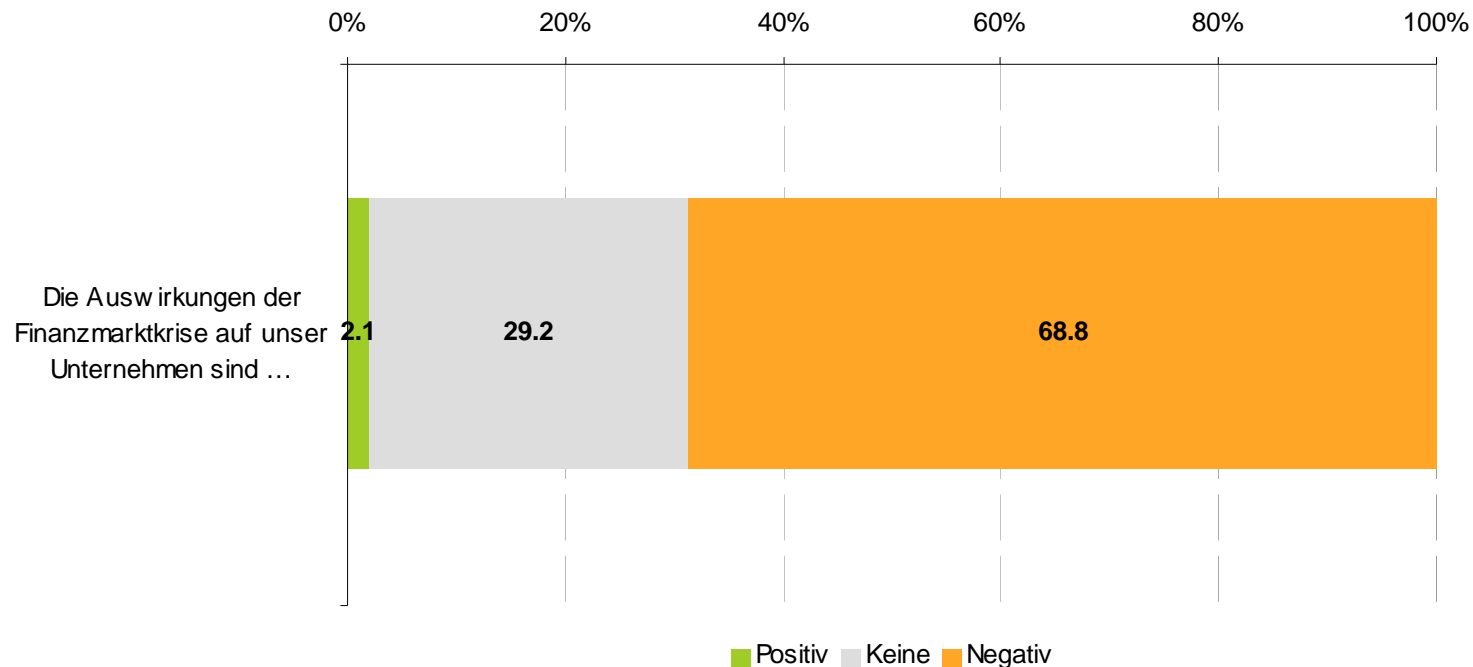
The CP Barometer provides regular reports on the state of the corporate publishing sector in German-speaking countries and sheds light on current developments and trends.

The CP Barometer ...

- ... is the **industry barometer for the corporate publishing sector** in German-speaking countries (Germany, Austria, Switzerland).
- ... provides regular information about the **current climate in the market and important trends** and addresses a **key topical issue** in every edition of the survey.
- ... is surveyed on behalf of the **European Institute for Corporate Publishing (EICP)** by the strategy consultancy, **zehnvier**.
- ... is conducted **twice a year as an online survey amongst a set group of respondents** (panel with approx. 60 corporate publishing executives – i.e. heads of marketing and communications – from large corporations and organisations with more than 250 employees).
- ... kicked off at the beginning of 2009 with a **pilot study** in the form of a telephone survey (survey conducted from December 2008 to February 2009).
- ... analysed the topical issue of the **impact of the financial and economic crisis** on the corporate publishing activities of companies in the pilot study.

The crisis has impacted a great deal on the circumstances that companies face: around two-thirds of companies rate this impact as negative to very negative.

Response to the question: to what extent will the current financial market crisis have a general impact on your company?



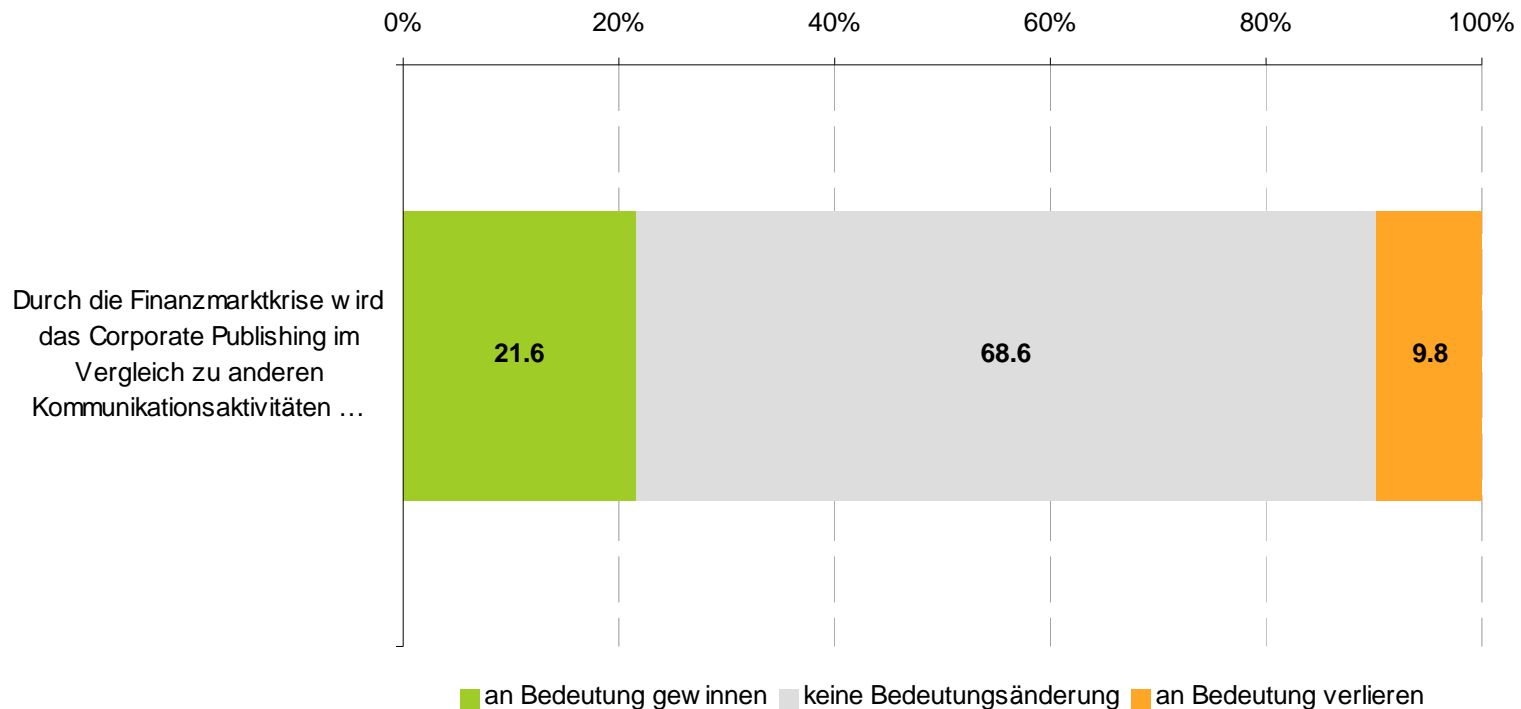
Figures in %, n = 48

Positive: top 2 boxes (very positive / positive)

Negative: bottom 2 boxes (very negative / negative)

Corporate publishing is braving the crisis: a fifth of corporate executives even anticipate an increase in importance compared with other communications activities.

Response to the question: how will the crisis impact on the importance of your corporate publishing activities, compared with other communications activities?



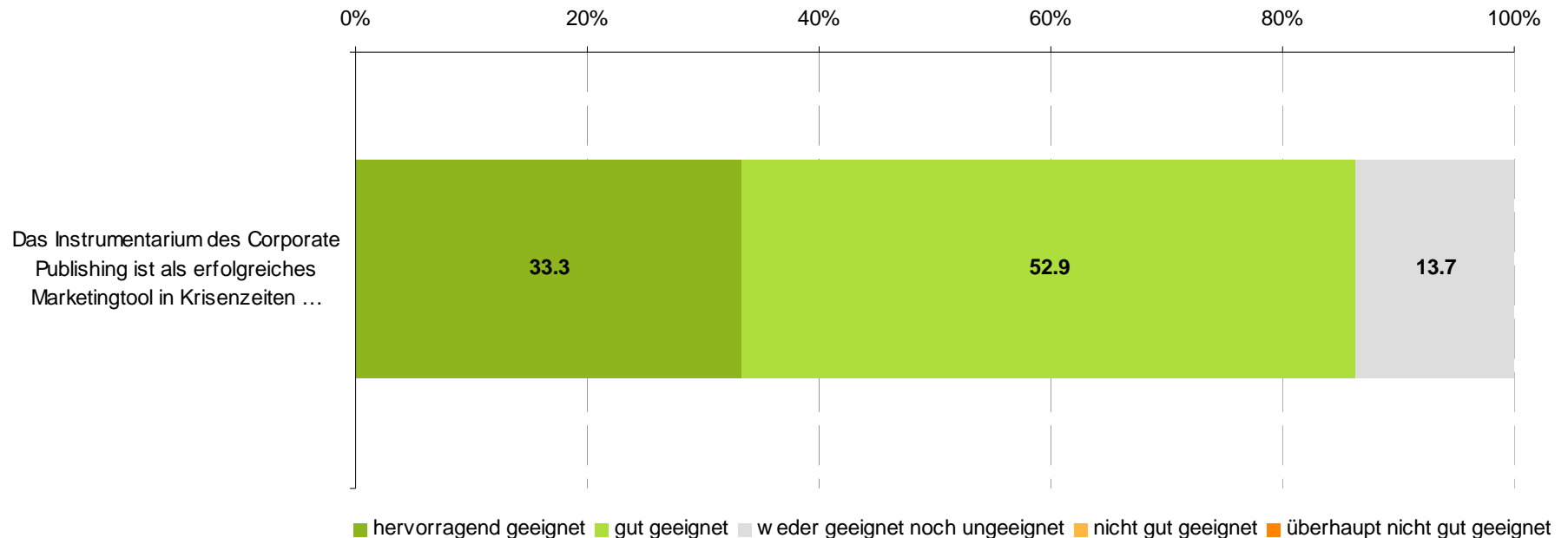
Figures in %, n = 51

Gain in importance: top 2 boxes (become significantly more important / become more important)

Decline in importance: bottom 2 boxes (become significantly less important / become less important)

Nearly all communications executives agree: corporate publishing is a suitable tool for successful communication, even in times of crisis.

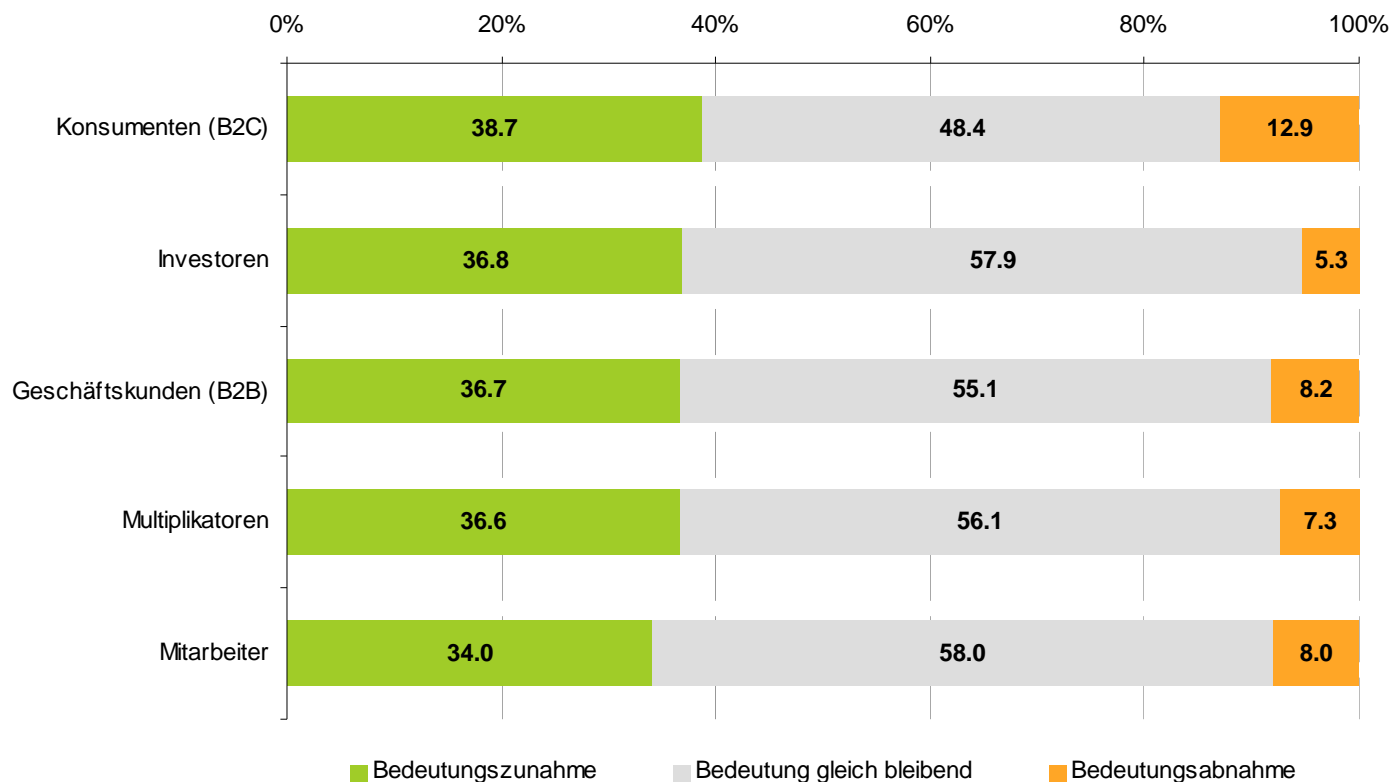
Response to the question: do you basically regard the instruments and opportunities provided by corporate publishing as a suitably powerful marketing tool in times of crisis?



Figures in %, n = 51

Corporate Publishing is in fact gaining in importance during the crisis: in each case more than 33% anticipate corporate publishing to become more important as an instrument of communication.

Response to the question: given the crisis, how do you rate the future importance to your company of corporate publishing in communicating with the following target groups?



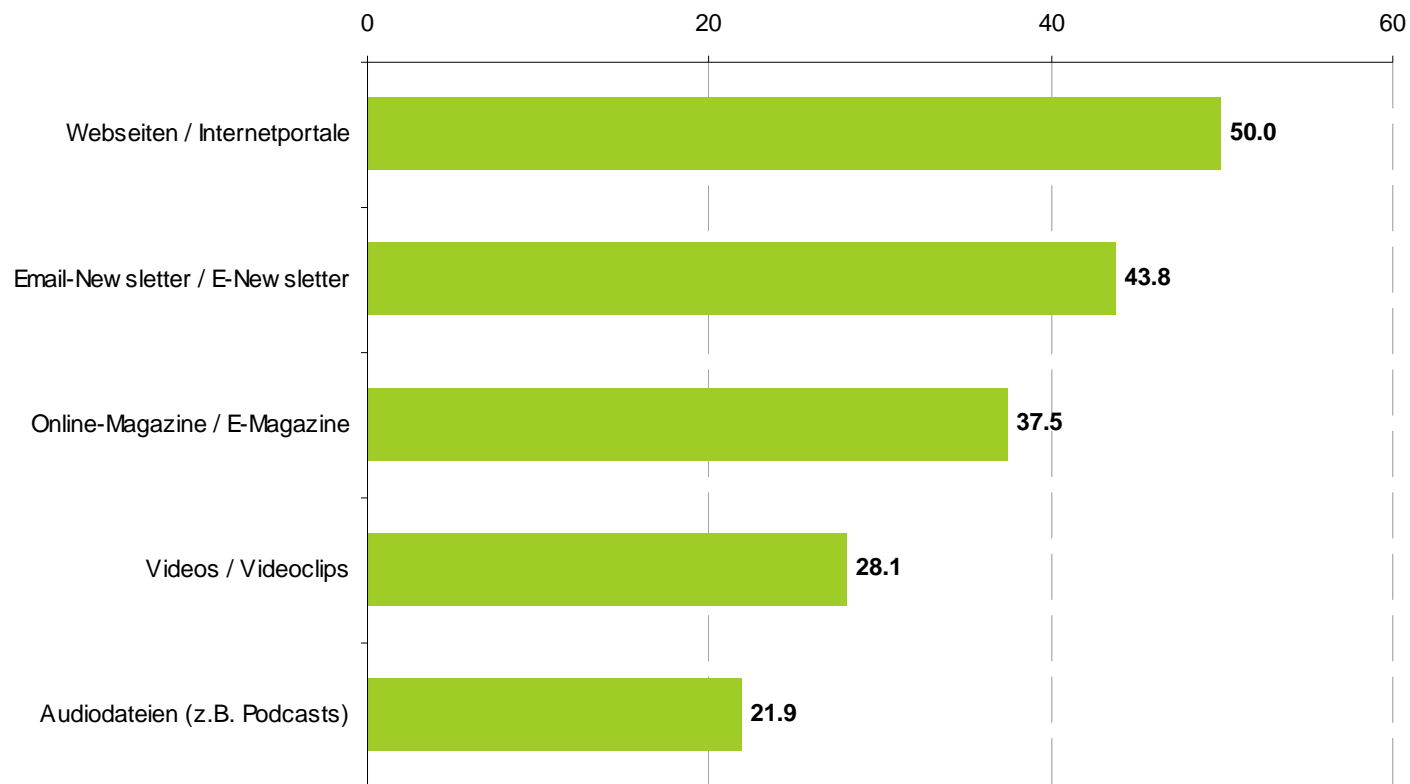
Figures in %, n = 31 – 50, in descending order starting with top 2 boxes

Increase in importance: top 2 boxes (importance of CP in communication with target group will increase sharply / increase)

Decrease in importance: bottom 2 boxes (importance of CP in communication with target group will decrease sharply / decrease)

If CP media are increasingly used for crisis communication, then it is online media (websites, newsletters and e-magazines) that feature most frequently.

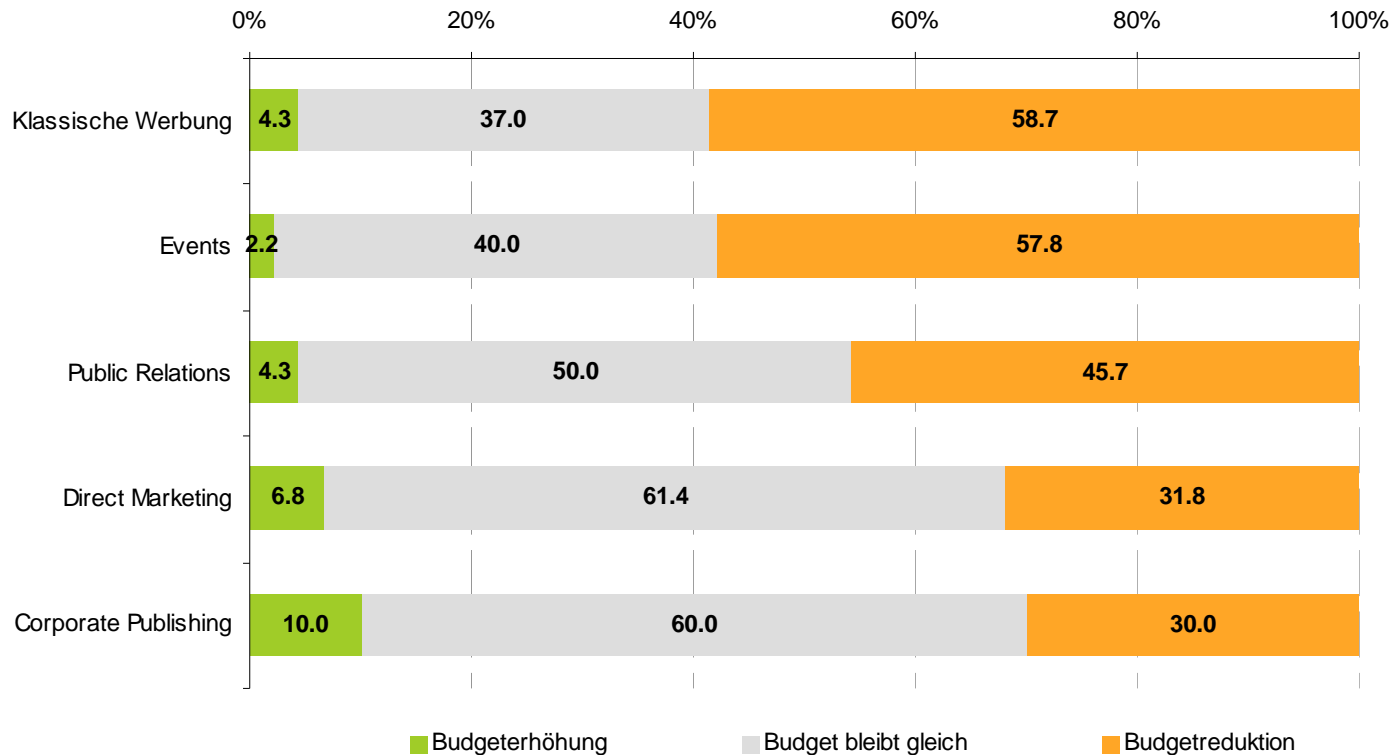
Response to the question: you can see a list of various media below. Which of these media do you plan to use more of in the future, given the crisis? – Top 5 out of 12



Figures in %, n = 32, multiple responses permitted

Communications budgets are generally under pressure. Conventional advertising and events are the most affected by budgets cuts, CP budgets exhibit the greatest level of stability.

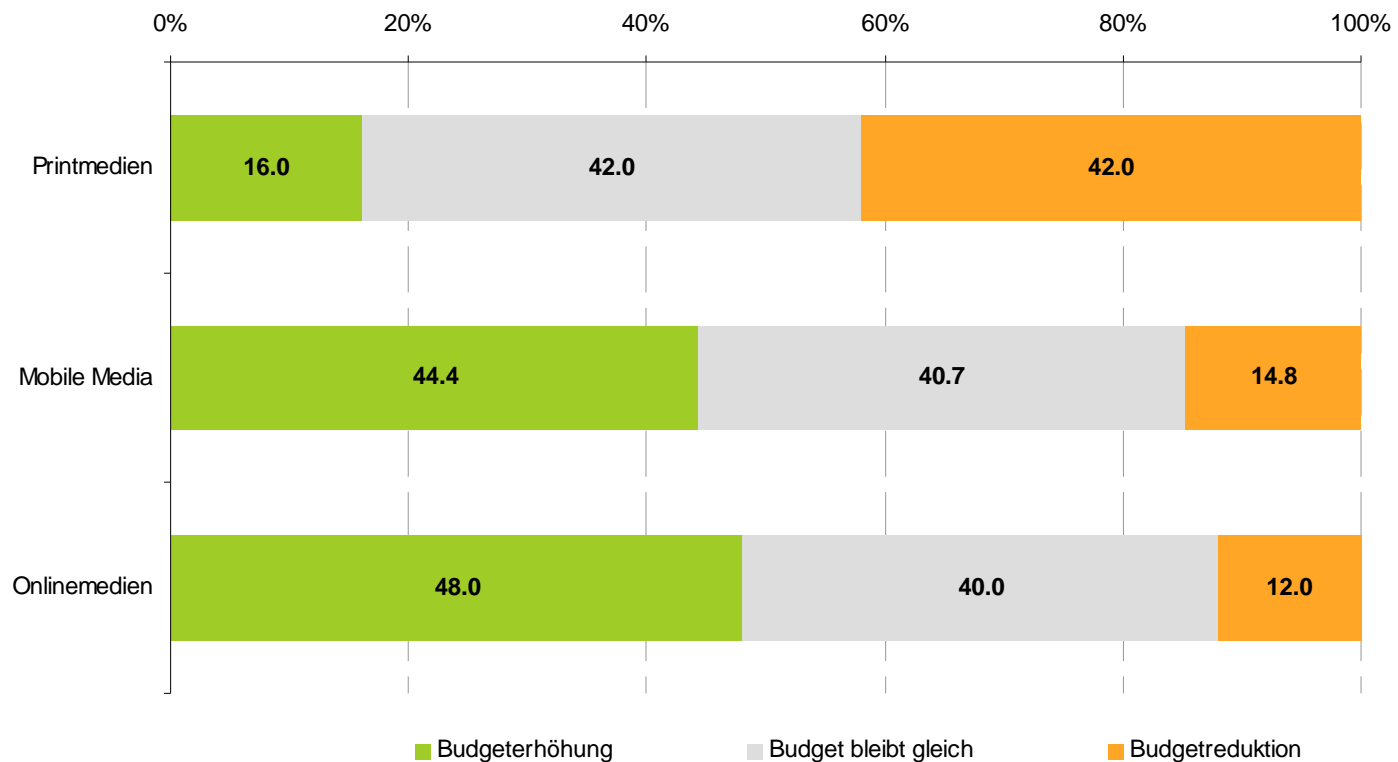
Response to the question: how will budgets within your overall marketing and media mix change over the next few months?



Figures in %, n = 44 – 50, in ascending order starting with bottom 2 boxes
 Budget increase: top 2 boxes (budget will be increased significantly / increased)
 Budget cut: bottom 2 boxes (budget will be cut significantly / cut)

More than 40% of companies anticipate larger budgets for online and mobile media. Where budget cuts are anticipated, these are most likely to occur in print media.

Response to the question: how do you rate your corporate publishing budget going forward, according to media segment?



Figures in %, n = 27 – 50

Budget increase: top 2 boxes (budget will be increased significantly / increased)

Budget cut: bottom 2 boxes (budget will be cut significantly / cut)

Greater number of partnerships with external service providers are being planned, in particular in the mobile and online media segments, whilst the number of print media partnerships will broadly remain the same.

Response to the question: to what extent will the future status of external service providers in the following CP segments change?



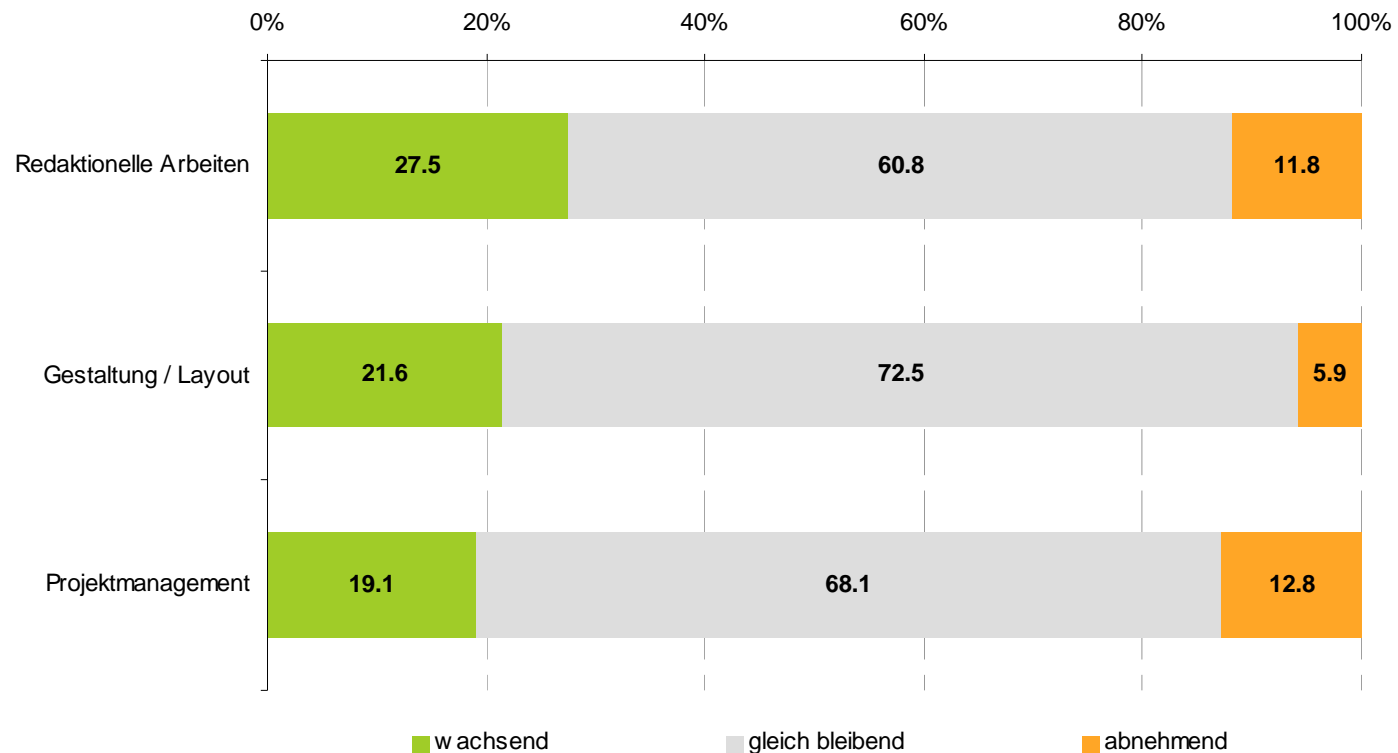
Figures in %, n = 28 – 51, in descending order starting with top 2 boxes

Status on the increase: top 2 boxes (status of external service providers will increase significantly / increase)

Status on the decline : bottom 2 boxes (status of external service providers will decline significantly / decline)

External service providers are likely to become increasingly involved in editing and also – although less noticeably so – in design/layout and project management activities.

Response to the question: to what extent will the future status of external service providers in the following CP activity segments change?



Figures in %, n = 47 – 51, in descending order starting with top 2 boxes

Status on the increase: top 2 boxes (status of external service providers will increase significantly / increase)

Status on the decline : bottom 2 boxes (status of external service providers will decline significantly / decline)