

SPECIAL REPORT

AUSTRALIA'S TOP ADVERTISERS

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ABOUT THE REPORT

For the first time, the Top Media Advertisers Report includes online display advertising spend estimates for calendar year 2008.

The data from 480 AdRelevance sites "traffic" data supplied by Nielsen Online, has been recoded to match Nielsen AdEx categorisations and advertiser/product definitions. A new rate estimates model has also been applied to enable estimates of ad spending to appear alongside other main media sectors.

The report covers main media advertising estimates for the period Jan to Dec 2008 versus 2007 and summarises:

- Top 25 Advertisers/Advertiser Groups (and key Advertisers/Brands).
- Top Advertiser Categories and their allocation of spend estimates across main media.
- Top Advertisers/Advertiser Groups by allocation of spend estimates across each of the 10 main media sectors.



WHILE AUSTRALIA RESISTED THE EARLY SIGNS OF THE ECONOMIC DOWNTURN, THERE WAS NO ESCAPE IN FOURTH QUARTER AS AD SPEND SLOWED, WRITES **PETER CORNELIUS**.

Although Australia's economy had resisted the early shockwaves of the global financial crisis, it could not totally offset the flow-on effect on ad spend across main media in the last quarter of 2008.

There was no apparent economic slowdown in ad spend until after the buoyant third quarter, which was boosted by the Beijing Olympics in August.

Just prior to the October stock market collapse in the US, as our overheated economy rapidly cooled, the Reserve Bank introduced the first in a record series of interest rate cuts. The combination of falling petrol prices and significant reductions in mortgage payments led to a lower cost of living. Aided by the Federal Government's short-term cash bonuses, revitalised consumer confidence and spending ensured retail media activity remained relatively strong in the lead-up to Christmas.

While it remains to be seen what long-term economic effect the various Government stimulus packages will create and whether these will shorten the downturn, retailers – particularly electronic retailers – were buoyed by increased sales in the quarter.

At the same time, responding to softening economic conditions, advertising bookings were very much short term as many advertisers – particularly global marketers – took a wait-and-see approach, with an eye on the global turmoil.

RETAILERS DOMINATE SPEND

The top 25 advertisers across the year were dominated by retailers (5), motor vehicles (4), government (4), FMCG (4) and telecommunication advertisers (2).

The Top Media Advertisers ranking was dominated by Wesfarmers – which, during the course of 2008, absorbed Coles Supermarkets

along with Target, Kmart (*campaign pictured*), Bunnings Hardware and Officeworks, and finished with an estimated 5% year-on-year growth.

Three of the top four advertisers were retailers – Wesfarmers, Harvey Holdings and Woolworths – with the exception being second-ranked Telstra, which showed a strong 7% year-on-year growth, while third and fourth-ranked Harvey Holdings and Woolworths substantially increased their main media spending by 17% and 18% respectively.

Although business and consumer confidence was shaken by the October stock market crash and subsequent Government bail-out strategies, the full impact of the cutbacks in main media were not evident until later in the year. This is reflected in the fact that only eight of the country's Top 25 main media advertisers recorded downturns for the calendar year.

Among other large increases were eighth-ranked Victorian Government (+17%), which managed to lift one spot, and Ford, which climbed from 23rd position in 2007 up to 17th in the 2008 rankings with a major increase of 19% YOY.

For some high-profile advertisers among the top 25, 2008 was a year of substantial downsizing in main media spend. As the Rudd Government delivered on its election promise of pulling back ad spending, 2008 saw the full impact unfold as the Federal Government dropped from being Australia's biggest advertiser in 2007 to 5th ranking, with an estimated 48% reduction in media spending.

Other notable decreases were Nestle Australia/L'Oreal (-5%), slipping from 4th to 6th; Suncorp Group (-8%), down from 8th to 10th; Village Roadshow (-13%), sliding from 11th to 16th; and General Motors Holden (-18%), down from 10th to 18th.

The 10 major advertising categories represented over 70% of estimated main media spending in Australia, and as such provide vital readings of the health of the advertising and media markets. After a solid first-half result, buoyed by incremental Beijing Olympics ad spending and delayed signs of a downturn until late in 2008, six of the top 10 categories recorded increased media spending year-on-year.

Retail, the largest advertising category, accounted for more than 20% share of main media spending in 2008. A solid 5% increase (\$100

million) saw this sector maintain in excess of \$2 billion in main media spending. Other solid performances among the major spending categories were travel & accommodation (+12%) and media (+10%).

Not surprisingly, the fourth-ranked finance sector recorded a decline of 6%, as did recruitment (-6%) and ninth-ranked communications (-4%). Across all 39 major categories, however, there were 16 registering declines year-on-year, although five were just 1% to -2%.

WHERE TO FROM HERE?

There can be little doubt that the speed of the slowdown has surprised even the most cautious industry leaders. However, Australia's economy appears to have absorbed much of the impact with greater resilience than most overseas markets.

In the light of our year-on-year ad spend estimates and taking into account a softening first few months of 2009, it's more than likely that the remainder of the calendar year will see at best, a continuation of modest growth; certainly less robust than was the case in the very buoyant calendar 2007.

EXPENDITURE ESTIMATES

Nielsen AdEx figures are estimates of expenditure. The company continues to put great emphasis on approximating actual expenditure with feedback from the industry.

However, the Australian main media scene is a dynamic one and estimating advertising expenditures continues to be an onerous task. As a result, changes are constantly being made to reflect industry feedback. Therefore, year-on-year comparisons are accurate at the time of producing this report but are subject to variances as updates occur to the database. <

Peter Cornelius is managing director Pacific Media of The Nielsen Company.

• From July 2007, Nielsen increased monitoring of metropolitan and national newspaper classifieds to include all classifieds measuring 10 column centimetres or more (previously 20). As classified advertising volumes and revenues increased substantially, any comparisons with calendar 2007 within this sector need to be treated with caution, particularly advertiser categories that use classifieds extensively, eg real estate and recruitment.



BIG SPENDERS

TOP 25 ADVERTISERS

Rank '08	Rank '07	Advertiser Group/ Advertiser	'08 est. spend \$m	Key Brands	YOY%*
1	2	Wesfarmers	225-230	Coles Supermarkets, Bunnings, Kmart, Target, Officeworks, Liquorland	5.1
2	3	Telstra	160-165	Telstra, Trading Post, Universal Publishers	6.8
3	5	Harvey Holdings	135-140	Harvey Norman, Domayne	16.8
4	6	Woolworths	135-140	Woolworths Supermarkets, Big W, Dick Smith	17.6
5	1	Commonwealth Government	115-120	Defence, Health & Ageing, Medibank Private, Environment & Water Resources	-47.7
6	4	Nestlé/L'Oreal	115-120	L'Oreal, Nestlé, Uncle Tobys, Jenny Craig, L'Oreal Luxury	-5.2
7	7	NSW Government	95-100	NSW Lotteries Corporation, Cancer Institute, RTA, Tourism, Health, Commerce	1.6
8	9	Victorian Government	95-100	Transport Accident Comission, Transport, Sustainability & Environment	17.3
9	13	Toyota Motor Corporation	80-85	Toyota, Lexus	9.5
10	8	Suncorp Group	80-85	AAMI, GIO, APIA, Suncorp, Shannons	-8.5
11	15	SingTel Group	80-85	Optus, Virgin Mobile, SingTel	11.0
12	12	Mitsubishi Motors	75-80	Mitsubishi, Triple Diamond National Dealer Group, Thrifty	12.1
13	17	Reckitt Benckiser	65-70	Napisan, Nurofen, Finish, Airwick, Strepisils, Lemsip, Mortein, Harpic, Dettol	13.2
14	24	Qantas Airways	60-65	Qantas, JetStar Air Pacific, QantasLink, Oneworld	25.3
15	16	Queensland Government	60-65	Tourism, Health, Transport, Premier & Cabinet, Energex, Ergon	-2.6
16	11	Village Roadshow Group	60-65	Roadshow Film Dist/Home Video, Village Cinemas, Today Austereo Network	-13.3
17	23	Ford Motor Company Group	60-65	Ford Motor Company, Ford Dealers	18.6
18	10	General Motors Holden Auto	55-60	Holden, Holden Dealers, Hummer	-18.5
19	14	Procter & Gamble	55-60	Head & Shoulders, Gillette, Olay, Pantene, Clairol, Metamucil, Max Factor	-10.4
20	19	Unilever	55-60	Continental, Lipton, Omo, Lynx, Flora, Streets, Bushells, Rexona, Dove	2.1
21	18	McDonald's Family Restaurants	55-60	McDonald's - Adult, McDonald's Family Restaurants	4.9
22	25	News Corporation	50-55	News Limited, 20th Century Fox Film Dist, News Digital Media	8.7
23	20	Myer	50-55	Myer Stores	4.1
24	21	ANZ Banking Group	50-55	ANZ Bank, Esanda Financial Corp, ANZ Executive Trustees	-11.7
25	31	David Jones	50-55	David Jones Stores, David Jones AmEx Card	27.3

*YOY % trends exclude online as ad spend data for online was not included in 2007.
Source: Nielsen AIS, AdEx January

RETAIL

Retail is by far the country's largest advertising category, and finished 2008 with an impressive 5% overall increase year-on-year* to almost \$2.1 billion.

In 2008, the top five sectors all recorded strong ad spending growth. This was led by the dominant household furnishings & homewares sector with 3% growth year-on-year and 29% share of spend; almost double that of second ranked supermarkets/food/household supplies (+5% YOY) and 14% share of spend.

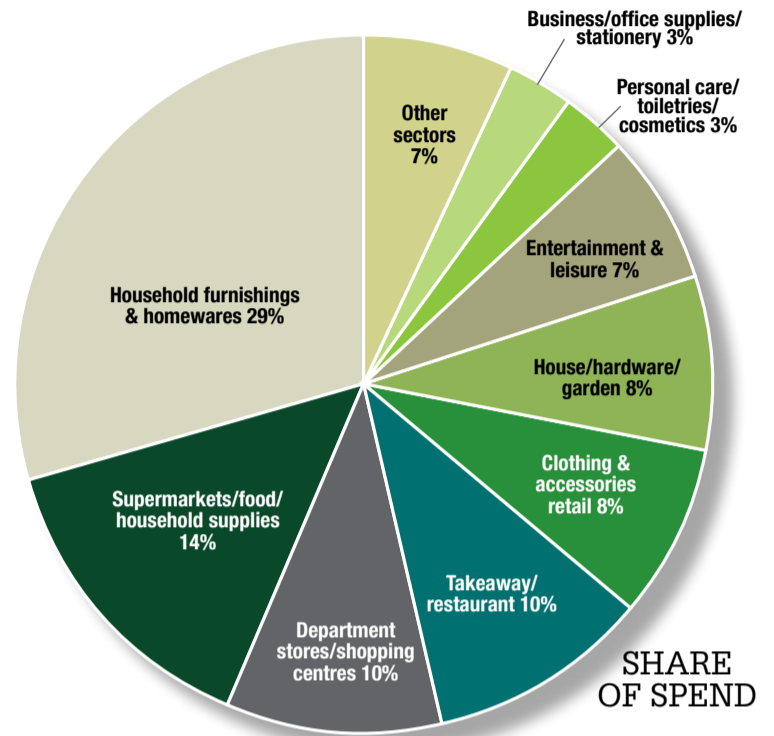
Driving growth was the category's biggest-spending advertiser, Harvey Norman, with a 17% YOY lift, due mainly to major ad spend growth across its discount stores (+14%), Harvey Norman-Electrical (+21%) and Computers (+29%).

Coles Supermarkets (-10%) was the only top advertiser to decrease ad spend. However, of equal interest is that four of the top 10 – Coles Supermarkets, Bunnings, Target and Kmart – are part of Australia's biggest advertiser group, Wesfarmers.

In a year of cutbacks, television (45%) was still the clear beneficiary of share of spend by retail advertisers, followed by newspapers with 34% share, then magazines (9%) and radio (8%).

*Note: All YOY % trend comparisons exclude online.

NUMBER ONE RETAIL CATEGORY LIFTS TO FINISH 5% HIGHER



TOP 10 ADVERTISERS

Rank	Advertiser	\$m	Change YOY
1	Harvey Norman	102.8	17%
2	Woolworths Supermarkets	78.6	28%
3	McDonald's Family Restaurants	55.2	9%
4	Myer	53.6	6%
5	Coles Supermarkets	53.4	-10%
6	David Jones	46.2	16%
7	Bunnings Building Supplies	42.1	0%
8	Kmart	37.7	15%
9	Target	35.8	20%
10	Domayne	34.7	13%

MEDIA SPLIT

TOTAL \$2bn - \$2.1bn, up 5%	
Metro TV	31%
Regional TV	14%
Metro press	27%
Regional press	7%
Magazines	9%
Radio	8%
Cinema	0%
Outdoor	1%
Direct mail	2%
Online	1%

ENTERTAINMENT & LEISURE

This major category maintained its top three position with an estimated all media spend of \$771 million to finish 2%* ahead of calendar year 2007.

Across this big-spending market, share of spend was dominated by the top two sectors – film distributors (18%) and live entertainment (17%), with advertising increases recorded across most sectors year-on-year.

Among the top 10 advertisers there was considerable movement compared to 2007, with Paramount Pictures climbing to top ranking with a massive 34% YOY increase – mainly due to a 40% increase in film releases and 50% of advertised films also running competition ads.

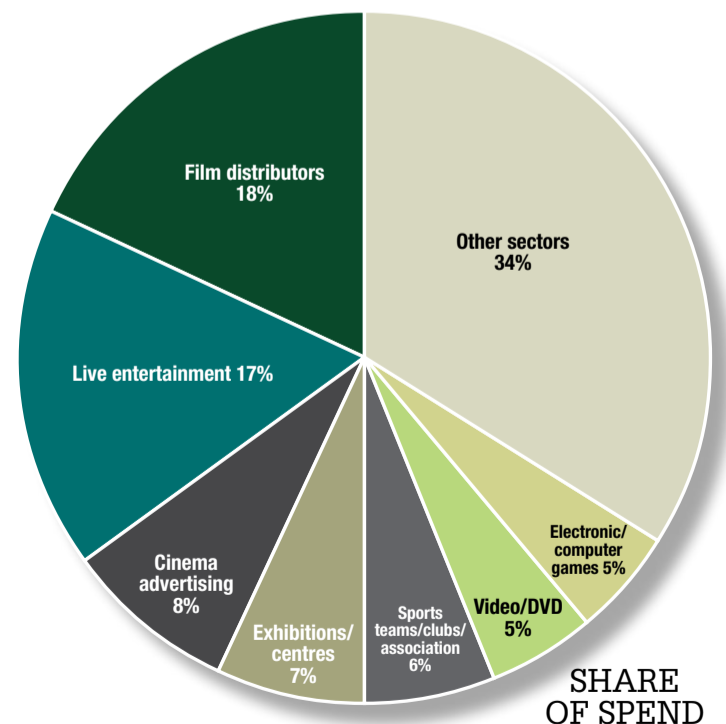
Among the other major increases was Universal Pictures International (+73%), which more than doubled its film releases in 2008, with major advertising support for *Mamma Mia* (\$2.6 million) and *Mummy Tomb Of the Dragon Emperor* (\$1.6 million).

Against this trend, there were four advertisers in the top 10 that registered sizable declines, with second-ranked Roadshow Film Distributors (down 16%) advertising 20% fewer films compared to 2007.

Television led with 40% allocation, followed closely by newspapers (35%).

*Note: All YOY % trend comparisons exclude online.

ENTERTAINMENT & LEISURE CATEGORY LIFTS 2%



TOP 10 ADVERTISERS

Rank	Advertiser	\$m	Change YOY
1	Paramount Pictures	30.3	34%
2	Roadshow Film Distributors	28.4	-16%
3	Universal Pictures International	20.4	73%
4	20th Century Fox Film Distributors	17.6	48%
5	Sony Pictures Releasing	15.1	28%
6	Nintendo Australia	14.1	52%
7	Hoyts Cinemas	12.0	14%
8	Walt Disney Studios Motion Pictures	11.0	-29%
9	Mattel	10.4	-22%
10	Roadshow Home Video	10.3	29%

MEDIA SPLIT

TOTAL \$770M - \$780m, up 2%	
Metro TV	33%
Regional TV	7%
Metro press	31%
Regional press	4%
Magazines	8%
Radio	7%
Cinema	1%
Outdoor	5%
Direct mail	1%
Online	3%

FOOD

This top 10 major category maintained its eighth position with a minimal 1%* decrease in estimated spend to \$375 million compared to the previous calendar year. There continued to be considerable movement within this highly competitive category, with the confectionery sector dominating share of spend (18%), followed by breakfast food, which slipped marginally to 13% share of spend.

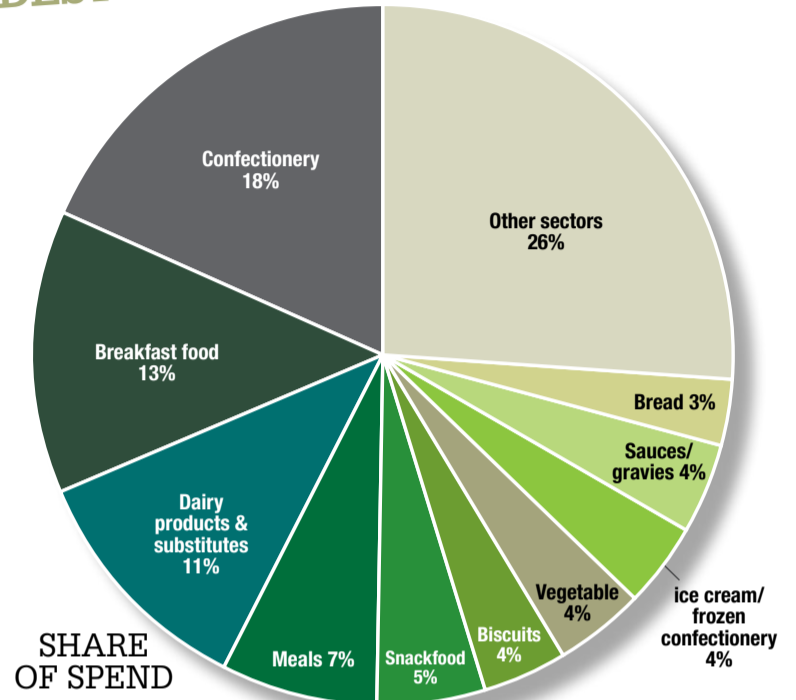
Although top advertiser Kellogg cut back by a sharp 22% year-on-year*, with major reductions for Nutri-Grain-Adult (-73%) and LCMs Bar (-33%), Cadbury Confectionery recorded strong growth, increasing overall spend by 8%, as well as spending more on Dairy Milk Block (+28%) and Old Gold Block Chocolate (+750%). In addition, fifth-ranked McCain Foods had a massive 77% lift, led by McCain's Healthy Choice Meals (+20%) and Season's Choice Frozen Fruit (+185%), as well as two new product launches: McCain Lasagne (\$2.4 million) and McCain Pizza (\$2.2 million).

Another substantial cutback was made by fourth-ranked Nestlé (-14%), across Cheerios Breakfast Cereal (-58%), Purina Beneful Dog Food (-7%) and Nestlé Peters Drumstick (-5%).

Television (including free-to-air and pay TV) dominated advertising for this category, gaining 70 cents in every media dollar spent in 2008; followed a distant second by magazines (14%).

*Note: All YOY % trend comparisons exclude online.

FOOD AD SPEND DECLINES BY A MODEST 1%



TOP 10 ADVERTISERS

Rank	Advertiser	\$m	Change YOY
1	Kellogg	30.6	-22%
2	Cadbury Confectionery	22.8	8%
3	Unilever Foods	21.7	6%
4	Nestlé	18.8	-14%
5	McCain Foods	16.2	77%
6	Uncle Tobys	16.0	5%
7	Simplot	13.6	-7%
8	Kraft Foods	13.2	-1%
9	Mars Snackfoods	12.6	40%
10	Ferrero	11.2	8%

MEDIA SPLIT

TOTAL \$370m – \$380m, -1% YOY	
Metro TV	61%
Regional TV	9%
Metro press	3%
Regional press	0%
Magazines	14%
Radio	4%
Cinema	1%
Outdoor	7%
Direct mail	0%
Online	1%

ALCOHOL

This category slipped two positions to rank 21st after a substantial 16% year-on-year* reduction in main media activity to finish with a spend of \$109 million.

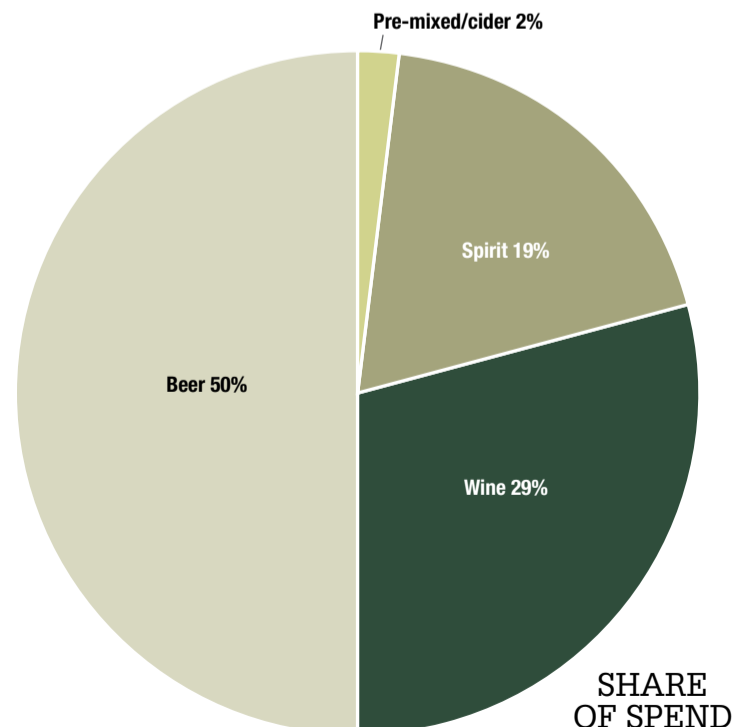
There was considerable movement within this highly competitive market as the beer sector, although dominating with 50% share of spend, declined by 11% year-on-year. Spirits also reduced spend, by 38% YOY. Against this trend, wine advertising increased share of spend with a substantial 17% increase YOY.

Offsetting a potentially bigger decline among the top 10 alcohol beverages advertisers (representing 70% of total ad spend in 2008), was top ranked Carlton & United Beverages, with a 15% increase YOY, supporting Carlton Draught (+52%), Victoria Bitter (+37%) and Carlton Crown Lager (+33%). However, the next three advertisers all recorded dramatic declines, with third and fourth-ranked Tooheys Brewery and Diageo Australia dropping by 43% and 59% respectively. Fifth-ranked Southcorp Wines also helped to brake the trend, with an impressive 35% lift YOY.

In a year of dramatic cutbacks, television attracted 34% share of all alcohol media spend, closely followed by outdoor with 24%, magazines (18%) and Cinema (11%).

*Note: All YOY % trend comparisons exclude Online.

ALCOHOLIC BEVERAGES ADVERTISING RECORDS A SOBERING 16% DECLINE



TOP 10 ADVERTISERS

Rank	Advertiser	\$m	Change YOY
1	Carlton & United Beverages	17.0	15%
2	J Boag & Son	8.9	-14%
3	Tooheys Brewery	8.3	-43%
4	Diageo	8.0	-59%
5	Southcorp Wines	7.5	35%
6	Pernod Ricard Pacific	5.7	-20%
7	Beringer Blass Wine Estates	5.6	0%
8	Heineken	5.1	28%
9	Lion Nathan	3.0	10%
10	Constellation Wines	3.0	121%

MEDIA SPLIT

TOTAL \$100m – \$110m, down 16%	
Metro TV	29%
Regional TV	5%
Metro press	5%
Regional press	1%
Magazines	18%
Radio	3%
Cinema	11%
Outdoor	24%
Direct mail	1%
Online	3%

TOILETRIES & COSMETICS

This major category held on to 13th position despite a flat 0% performance year-on-year*, finishing with an estimated media ad spend of \$246 million.

In this highly competitive market, the top-ranking skin care sector maintained its dominance with a 34% share of spend (up 2% YOY) followed by second-ranked cosmetics/make-up (21% share). Fragrances lifted ad spend by an impressive 20% year-on-year, but ad spend for sanitary protection products dropped by 11% in 2008.

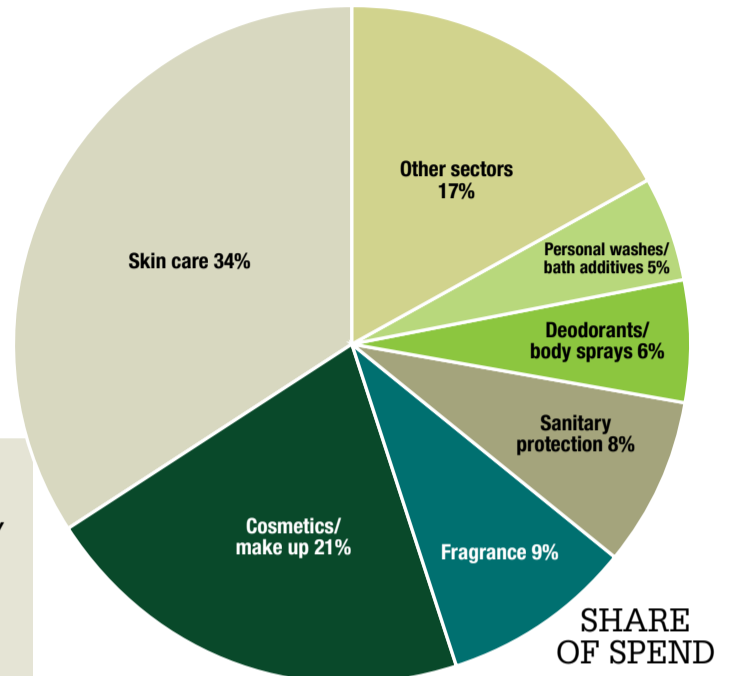
Two of the top four advertisers recorded advertising cutbacks – top-ranking L'Oreal reduced spend by 3%, and Johnson & Johnson posted a major 33% reduction in support, mainly for its Carefree Tampons (-85%) and Carefree Barely There Pantyliners (-45%).

Offsetting these declines was strong growth by Lever Rexona (+25%), including Rexona Deodorant For Men Spray (+145%) and a new product launch for Impulse Deo/Frag True Love-Spray (\$1.6 million.). Guthy Renker also increased its advertising spend by 158%, with major support for its Proactiv Solutions Skincare Range (+80%), Sheer Cover Toiletries/Cosmetics Range (+500%) and Principal Secret Skin Care Range (+650%).

In a mixed year, television enjoyed the biggest share of media spending (48%), closely followed by magazines (40%).

*Note: All YOY % trend comparisons exclude online.

TOILETRIES & COSMETICS ADVERTISING LOSES GLOSS



TOP 10 ADVERTISERS

Rank	Advertiser	\$m	Change YOY
1	L'Oreal	34.4	-3%
2	Lever Rexona	20.3	25%
3	Kimberly-Clark	14.4	1%
4	Johnson & Johnson	14.4	-33%
5	Guthy Renker	14.3	158%
6	Procter & Gamble	12.1	4%
7	Beiersdorf	10.9	39%
8	Heat Group	9.3	12%
9	Coty	8.7	-8%
10	Estee Lauder	8.0	-7%

MEDIA SPLIT

TOTAL \$240m – \$250m, 0% change YOY	
Metro TV	41%
Regional TV	7%
Metro press	4%
Regional press	0%
Magazines	40%
Radio	1%
Cinema	2%
Outdoor	4%
Direct mail	0%
Online	1%

HAIR CARE

This category held on to its 26th position despite a major 23% year-on-year* reduction in ad spend to an estimated \$54 million. Major cutbacks in three of the four category sectors saw shampoos/conditioners reduce ad spend by an estimated 32% and second-ranked hair care range show a similar decline YOY.

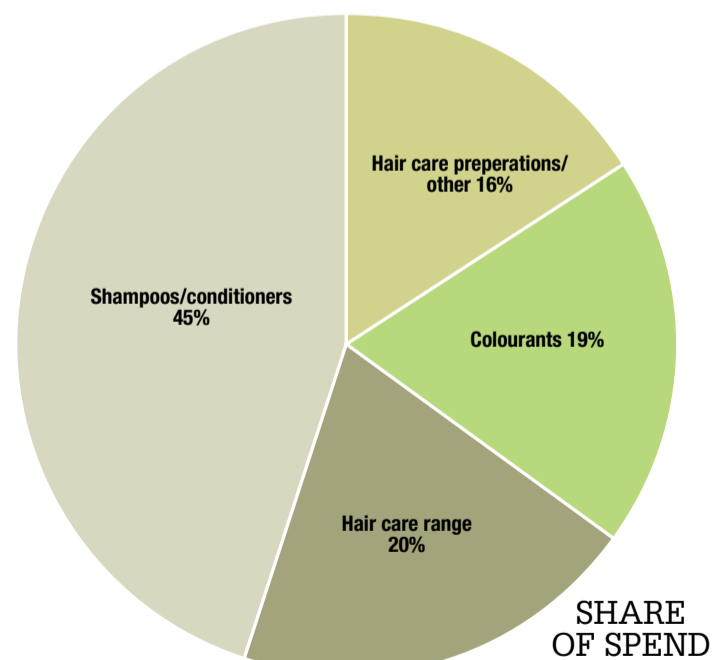
With seven of the top 10 hair care advertisers cutting back their media spending substantially, including the top four, ad spend was always going to end up in free fall. L'Oreal cut ad spend by 7%, mainly reducing support for Garnier Fructis Shampoo (-86%) and L'Oreal Casting Hair Colour-Female (-70%). In addition, second-ranked Procter & Gamble (-14%) cut back heavily on ad spend for Pantene Pro V Shampoo/Conditioner (-78%), Clairol Herbal Essences Shampoo (-70%) and Head & Shoulders Antidandruff Shampoo (-69%).

Against this trend, fifth-ranked Colgate Palmolive boosted its overall ad spend by 78% and heavily supported Palmolive Naturals Shampoo/Conditioner (+63%).

In a year of cutbacks, television (60%) was still the clear share-of-spend winner, followed by magazines (32%).

*Note: All YOY % trend comparisons exclude online.

HAIR CARE TAKES A DRAMATIC 23% TUMBLE



TOP 10 ADVERTISERS

Rank	Advertiser	\$m	Change YOY
1	L'Oreal	17.8	-7%
2	Procter & Gamble	17.7	-14%
3	Lever Rexona	2.3	-71%
4	Schwarzkopf	2.2	-60%
5	Colgate Palmolive	2.1	78%
6	Alberto Culver	2.0	-75%
7	John Frieda Hair Care	1.9	27%
8	Natures Organics	1.3	-15%
9	GH	1.2	0%
10	Johnson & Johnson	0.7	-30%

MEDIA SPLIT

TOTAL \$50m – \$60m, down -23%	
Metro TV	53%
Regional TV	7%
Metro press	3%
Regional press	0%
Magazines	32%
Radio	1%
Cinema	1%
Outdoor	2%
Direct mail	0%
Online	1%

TRAVEL & ACCOMMODATION

TRAVEL & ACCOMMODATION AD SPEND SOARS 12%

This major category retained sixth position overall by recording a substantial 12% year-on-year* increase in all media, with an ad spend of \$525 million.

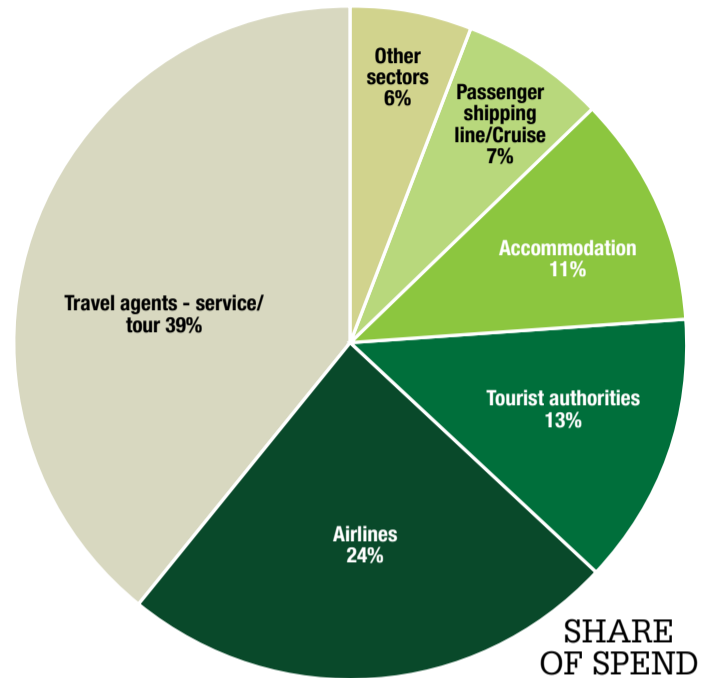
Among the key sectors, travel agents-service/tour continued to dominate with almost 40% of all media spending, increasing overall spend by 21%, with second-ranked airlines up 9% to gain 24% share of spend.

Leading the overall growth were the top three advertisers in the category – Flight Centre (+22%), Qantas (+24%) and Jetstar (+31%) – with Tourism Queensland also recording a substantial 22% year-on-year lift in spending.

Only two of the top 10 advertisers in 2008 reduced estimated ad spending – Virgin Blue Airlines (-19%) and P&O Holidays (-10%) – with all others recording strong to major year-on-year increases.

Newspapers maintained their dominance among travel & accommodation advertisers with 51% share of spend, followed by television (18%) and magazines (11%). A solid share in this category went to both online (7%) and outdoor (7%).

*Note: All YOY % trend comparisons exclude online.



TOP ADVERTISERS

Rank	Advertiser	\$m	Change YOY
1	Flight Centre	31.3	24%
2	Qantas	30.9	31%
3	Jetstar	30.3	22%
4	Virgin Blue Airlines	23.4	-19%
5	P&O Holidays	14.8	-10%
6	Tourism Queensland	11.5	8%
7	Scenic Tours Australia	11.5	22%
8	Harvey World Travel	11.3	8%
9	Emirates Group	9.5	32%
10	Aust Pacific Touring	9.4	8%

MEDIA SPLIT

Media	Share
TOTAL	\$520m – \$530m, up 12%
Metro TV	15%
Regional TV	3%
Metro press	48%
Regional press	3%
Magazines	11%
Radio	4%
Cinema	1%
Outdoor	7%
Direct mail	1%
Online	7%

PHARMACEUTICALS

PHARMACEUTICALS AD SPEND CLIMBS 10%

This major advertising category climbed one spot to rank 14th, with a robust 10% year-on-year* increase in estimated media spend to \$235 million.

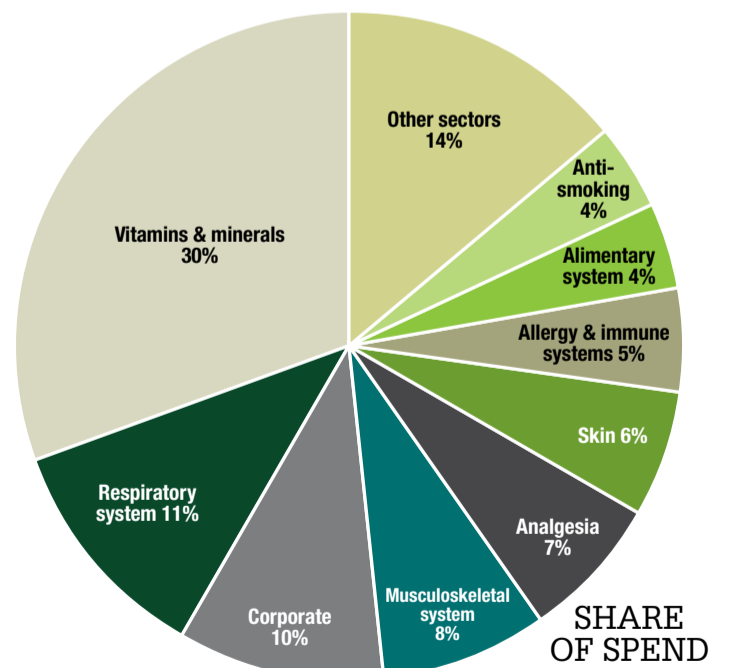
In a buoyant year for pharmaceuticals, vitamins & minerals maintained its dominant share of spend, albeit with only a 1% lift in ad spend YOY. Most sectors had healthy increases over 2007, driven by second-ranked respiratory system (+23%) and third-ranked corporate (+23%), although fifth-ranked analgesia cut back in 2008 (-5%)*.

Seven of the top 10 advertisers were in growth mode – prominent among these were Wyeth, which upped its overall spend by 20%, heavily supporting Advil Liquid Capsules (+14%), Centrum Multivitamin Tablets (+53%) and the launch of its Recharge B Group Vitamins and Dimetapp Pain & Fever Relief Range.

Also, Pfizer with new corporate campaign launches for Outsmart Cigarettes (\$4.1m), Cholesterol Test (\$3.0m) and Impotence (\$1.5m). Swisse Health Products (+166%) heavily supported its Swisse Ultivite Formula (+410%) and Multi-Vitamin Rng (+1060%).

In a year of healthy growth, television enjoyed 67% share of all media spend by pharmaceutical advertisers, followed by magazines (13%), press (9%) and radio (4%).

*Note: All YOY % trend comparisons exclude online.



TOP ADVERTISERS

Rank	Advertiser	\$m	Change YOY
1	GlaxoSmithKline	25.7	-6%
2	Wyeth	20.7	20%
3	Johnson & Johnson	18.9	6%
4	Reckitt Benckiser	17.8	4%
5	Pfizer	11.2	N/A
6	Symbion Health	10.7	-2%
7	Swisse Health Products	9.8	166%
8	Schering Plough	9.1	56%
9	Health World	8.2	-1%
10	Bayer	7.9	22%

MEDIA SPLIT

Media	Share
TOTAL	\$230m – \$240m, UP 10%
Metro TV	57%
Regional TV	10%
Metro press	9%
Regional press	0%
Magazines	13%
Radio	4%
Cinema	1%
Outdoor	3%
Direct mail	1%
Online	2%

MOBILE PHONES & ACCESSORIES

This was one of the hottest, fastest-growing sectors in media advertising in 2008, increasing ad spend by a sizeable 44% year-on-year*, to an estimated \$46 million.

The market saw several new products and multiple handset models launched throughout 2008, with the Apple iPhone perhaps grabbing the most attention – and spending the most on advertising, making up 11% of every mobile advertising dollar in 2008.

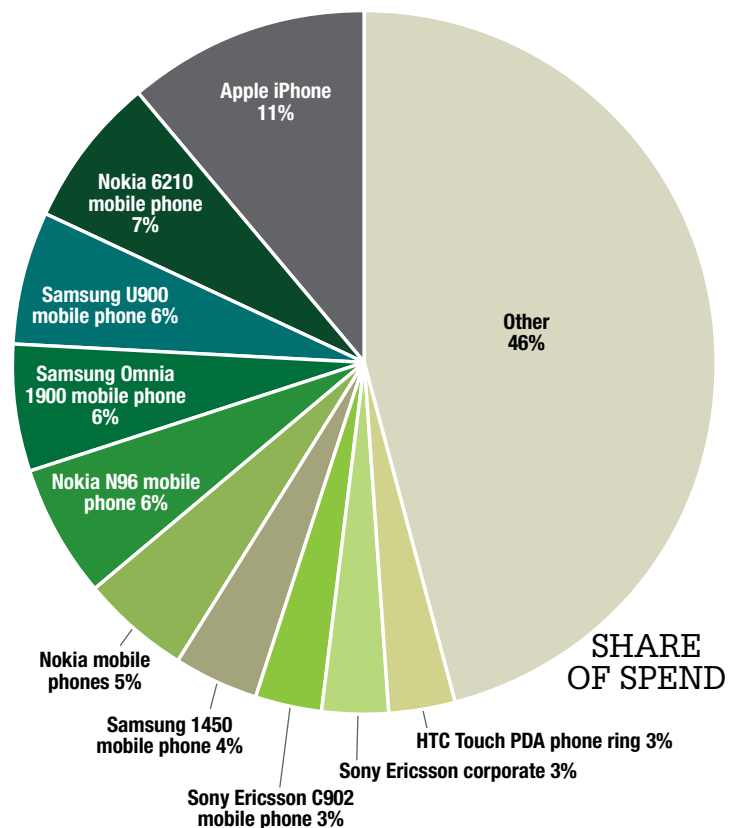
Although 3 Nokia phones/ranges were present in the top 10 products advertised, Nokia's overall media spend across its range decreased by a significant 16% year-on-year. Nokia remained the dominant player, however, despite major advertising investments from other top players, including Samsung (+105%), Sony Ericsson (+230%) and LG (+110%).

Motorola was the other advertiser to record a substantial reduction in ad spend, down 45% year-on-year.

In a dynamic mobile marketplace, television grabbed the most ad dollars (47%), followed by outdoor (22%) and magazines (15%), with online and metro press each attracting 6%.

*Note: All YOY % trend comparisons exclude online.

MOBILE PHONES & ACCESSORIES UP AD SPEND BY 44%



TOP ADVERTISERS

Rank	Advertiser	\$m	Change YOY
1	Nokia Mobile Phones	13.6	-16%
2	Samsung Electronics	8.5	105%
3	Sony Ericsson	7.2	230%
4	Apple Computers	4.9	N/A
5	LG Electronics	3.6	110%
6	HTC Corp	2.5	330%
7	Motorola	2.4	-45%
8	Telstra	1.3	N/A
9	Carrier Devices & Services	0.4	-45%
10	Blueant Wireless	0.3	-1%

MEDIA SPLIT

Media Type	Share of Spend
TOTAL \$40m - \$50m, up 44%	
Metro TV	46%
Regional TV	1%
Metro press	6%
Regional press	0%
Magazines	15%
Radio	2%
Cinema	1%
Outdoor	22%
Direct mail	0%
Online	6%

