

# Media Focus Ad Market Trend 2007/08

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## Monthly Report on the Swiss Advertising Market

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### August 2007 - Highlights:

- ▶ Good advertising month in August: advertising impact increased by 7.5% in August 2007 compared to the same period in the previous year. The cumulative increase since the beginning of the year reached 7.9%.
- ▶ Several advertising markets have undergone noticeable developments compared to August 2006:

With an increase of 94.6% compared to the previous year the key market **„Watches/Jewellery“** achieved the largest monthly increase in the year to date to become this month's winner in terms of growth. Due to the relative low total spendings compared to the other key markets,

the monthly trend in this product market reacts particularly sensitively to large advertising campaigns. *Omega Uhren* was responsible for the campaign with the highest advertising spendings in August, with more than a quarter of the total spendings in this key market spent on this product.

The key market **„Telecommunications“** invested 20.3% (minus 2.9 mill. CHF) less in communication in the data month August than in the same period in the previous year. A closer examination of the product group developments shows which telecommunication areas are responsible for the negative trend. The total savings of 2.9 mill. CHF in the total telecommunications market are found in the group *Fixnet*. Although this field of business is dominated by Swisscom, the trend can be generally applied to all advertisers in the product group *Fixnet*.

The branch **„Household Devices (incl. Cleaning)“** is another of this month's winners with an increase of 53.3% compared to August 2006. The most striking positive trends can be seen in the product groups *Washing Detergents* (+ 105.4%) and *Cleaning and homecare products* (+ 64.8%). The 20 products with the highest ad spendings in August totalled 6.3 mill. CHF (+ 35.3% compared to the Top 20 in the same period in the previous year) and together totalled 64% of the total spendings for August in this key market.

The advertising markets **„Food (+61.3%)“**, **„Political Campaigns (+44.0%)“**, **„Charitable Campaigns (+42.6%)“** and **„Energy (+27.0%)“** all experienced significant growth in the advertising month August compared to the same period in the previous year.

- ▶ The media groups cinema and TV both experienced above-average growth this month. Cumulated data for the months January – August 2007 show that the media group TV has experienced above-average growth this year.

**Please note:** Various data suppliers for Internet were not able to deliver data for August. Due to that fact, the data of media group internet are not active this month. Please find detailed information about this issue in the media information of Media Focus.

## Development of Advertising Pressure Total Market

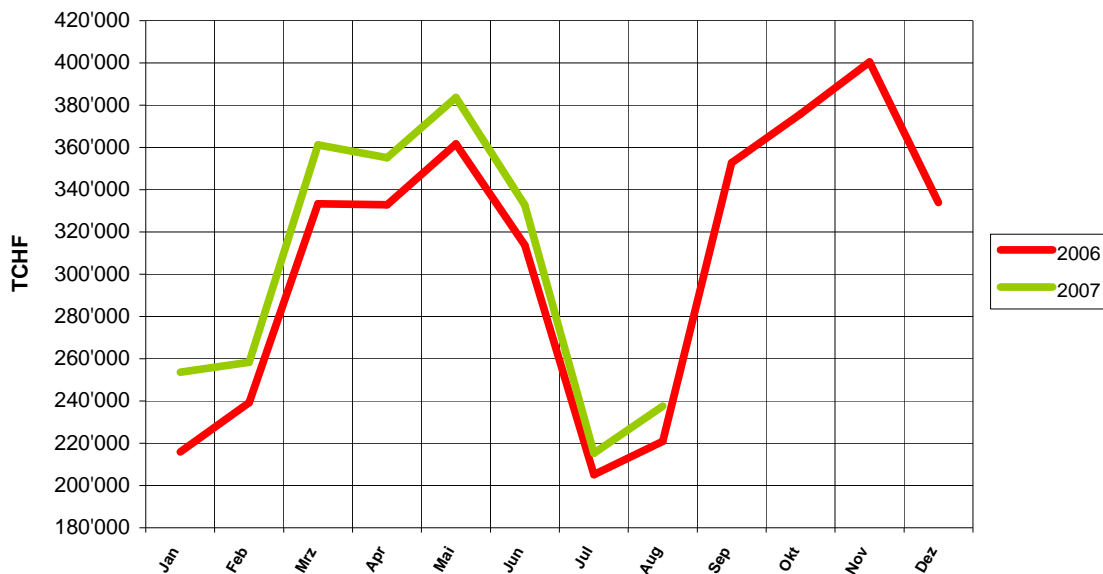
Chart: Advertising Pressure Trend as per August 2007

Monat	2006 TCHF	2007 TCHF	+/- %
Januar	215'956	253'687	17.5%
Februar	239'283	258'299	7.9%
März	333'322	361'241	8.4%
April	332'873	355'186	6.7%
Mai	361'591	383'609	6.1%
Juni	313'821	332'704	6.0%
Juli	205'174	215'272	4.9%
August	220'972	237'562	7.5%
September	352'704		
Oktober	375'848		
November	400'483		
Dezember	333'869		
year to date	2'222'992	2'397'560	7.9%

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Chart: Monthly Advertising Pressure Trend compared to 2006

Development of Advertising Pressure 2006 / 2007



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## Development of Advertising Pressure over time

Chart: Development of Advertising Pressure current month versus last 10 Years

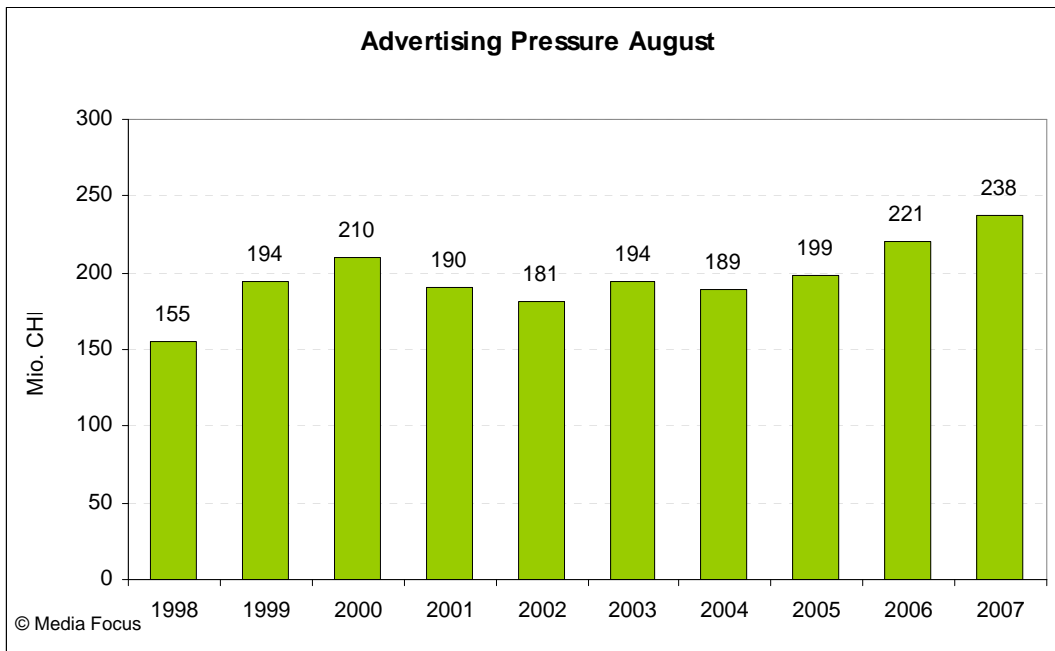
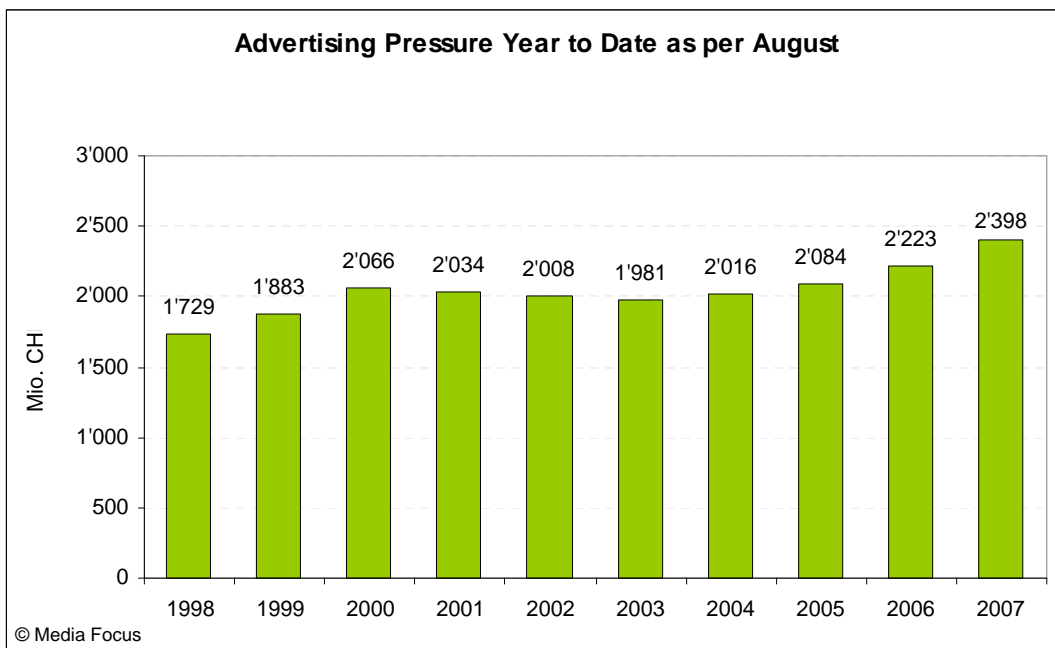


Chart: Development of Advertising Pressure Year to Date versus last 10 Years



## Development of Advertising Pressure per Key Market

Chart: Actual Status versus previous Year versus cumulative August 2007

Pos.	Key Market	August 2007		2007 cumulative	
		TCHF	+/- PY %	TCHF	+/- PY %
<b>All Key Markets</b>		<b>237'562</b>	<b>7.5</b>	<b>2'397'560</b>	<b>7.9</b>
1	Clothes, Sports, Leisure	7'059	18.2	82'524	15.2
2	Services	14'173	15.0	136'823	19.2
3	Energy	1'598	27.0	19'033	9.5
4	Automotive	17'070	-3.6	249'606	3.9
5	Finance / Insurances	23'202	19.0	230'028	18.5
6	Public Benefits	6'352	42.6	54'288	29.3
7	Beverages	8'797	-14.8	88'839	-5.8
8	Household Devices	9'790	53.3	80'987	7.0
9	IT	3'872	-27.1	39'283	-5.0
10	Cosmetics / Body Care	15'600	1.5	153'421	25.6
11	Furniture, House / Garden	10'898	8.2	114'876	-1.3
12	Food	22'917	61.3	223'181	31.9
13	Pharmaceutical / Health	4'617	21.0	56'545	4.7
14	Political Campaigns	3'745	44.0	28'239	78.1
15	Tobacco	234	-84.7	9'445	-67.2
16	Telecommunications	11'220	-20.3	136'198	7.1
17	Tourism, Transport	14'736	4.1	139'665	4.6
18	Entertainment Dev. Photo	8'366	0.7	82'594	-1.9
19	Watches Jewellery	2'189	94.6	29'670	13.4
20	Other smaller Markets	18'581	18.6	162'983	6.5
21	Assortment Advertising*	24'447	-13.2	184'081	-12.2
22	Image Advertising*	8'098	-6.2	95'253	4.4

\* those not being allocated to a certain market

## TOP Companies generating Advertising Pressure August 2007

Chart: Top 30 and share of total market

Rang	Retailer
1	MIGROS
2	COOP
3	PROCTER & GAMBLE
4	L'OREAL
5	UBS
6	SWISSCOM
7	MANOR
8	ALDI SUISSE
9	MEDIA MARKT
10	NESTLE
11	UNILEVER
12	COCA COLA BEVERAGES
13	FUST
14	SVP
15	DIE POST
16	IKEA
17	RENAULT
18	CREDIT SUISSE
19	RECKITT-BENCKISER
20	ORANGE COMMUNICATIONS
21	MC DONALD'S
22	BEIERSDORF
23	TDC SWITZERLAND
24	FORD
25	HYUNDAI
26	HENNES + MAURITZ
27	MASTERFOODS
28	SIMIQ B.V.
29	VERBAND SCHWEIZER PRESSE
30	BUNDESAMT FUER GESUNDHEIT

CHF 96.9 million  
= 41 % of total market

<sup>3</sup> Media Focus differentiates between advertising spendings of production / service companies and retailers. The brand advertising could also be effected via retailer (i.e. retailer Bucherer for brand Rolex). The company / product relationship within the database remains unaffected, thus Rolex Geneva is the producer of Rolex products / watches. However, Media Focus additionally identifies the respective retailer, when the advertisement is clearly steered by retailer activities.

## About Media Focus

Media Focus has been monitoring Swiss advertising pressure since 1990 for the following media advertising groups: newspaper, magazines, special interest, TV, radio, outdoor, cinema, internet and teletext.

The Media Focus advertising information is based on a product-specific observation of all advertising activities. This level of detail is unique in Switzerland and enables corresponding in-depth analyses of all advertising markets.

Media Focus measures gross advertising pressure. "Gross" means that every single advertisement (with exception of advertising for advertising media) is valued according to the official tariffs of the respective advertising medium. This gross evaluation is the internationally recognized standard for the analysis of advertising markets and is used worldwide.

As a joint venture between the two renowned global research companies IHA-GfK AG and The Nielsen Company, Media Focus is part of a worldwide leading network in the fields of advertising, consumer panel, retailer business and media research.

## Contact

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