Ein Joint Venture der IHA-GfK AG und der AC Nielsen SA

Media Focus
Ad Market Trend
Report 2008/04

Monthly report on Swiss advertising market

Contents

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1. Data month April 2008: Highlights

April was a very strong advertising month. Compared to the same period in the previous year, the gross advertising pressure increased by 15.2% to TCHF 410‘166. The cumulated plus for the year 2008 is 10.0%.

The strongest growth in a key market was analyzed for **“Political Campaigns”** with an increase of 53.7% (5.5 million CHF) compared to the same period in the last year.

Another very positive trend was seen again in the sector „**Consumer Electronics / Photo / Video”.** The advertising pressure raised of 43.4% to 15.4 million CHF compared to the pervious period. Outstanding intensive advertising was seen in the product markets *Audio–Visual-Medium* (4.6 million CHF) and *Film + Pay TV* (2.9 million CHF). The highest growth this month with a plus of 290.2% (+2 million CHF) was generated in the advertising market *TV*, especially in the segment *TV Flat (LCD/Plasma)* with 1.9 million CHF.

A glance at the key market **„Pharma / Health“** shows an increase by 22.5% to totally 9.6 million CHF compared to the previous period. 71% of the advertising pressure in this market was made in the market *OTC Pharma Products* (6.6 million CHF), where *Analgesic*, with 1.6 million CHF, is the biggest player.

Over all markets the part **“Image advertising”** (advertisement with no product reference) increased by 43.3% (19.3 million CHF) compared to the same period in the previous year.

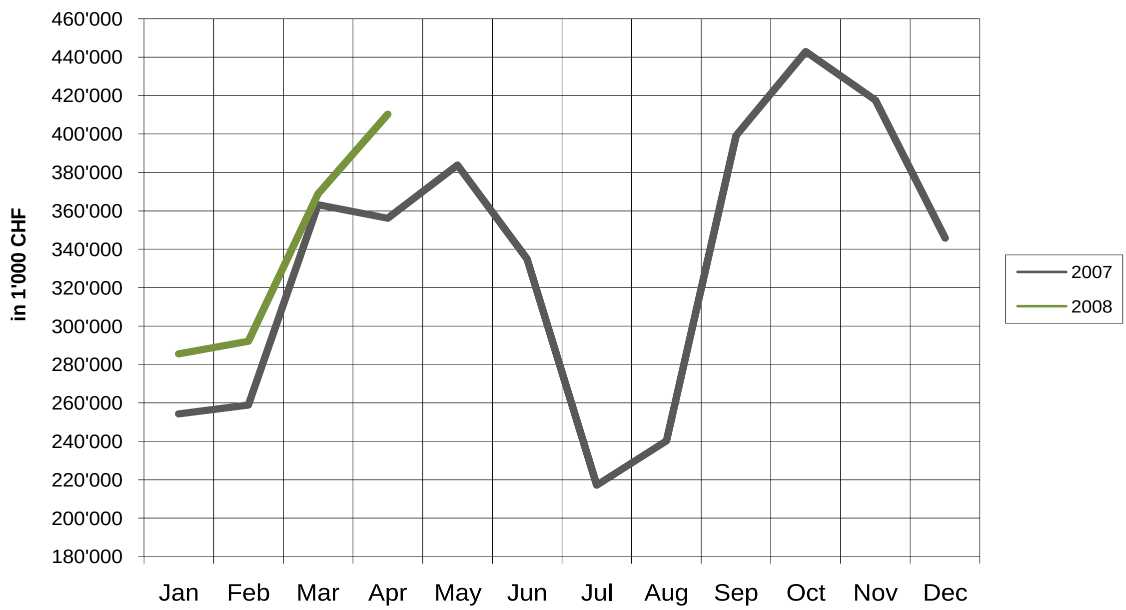
Positively results were also seen for the advertising markets **“Telecommunications”** (+24.7%), “**Watches / Jewelry”** (+23.7%) and **“Housekeeping devices”** (+19.5%) compared to April 2007.

2. Evolution advertising pressure total market

Chart: Advertising pressure trend 2008 (update April)

month	2007 TCHF	2008 TCHF	+/- %
January	254'323	285'459	12.2%
February	258'960	292'055	12.8%
March	363'197	368'675	1.5%
April	356'137	410'166	15.2%
May	383'847	0	
June	334'955	0	
July	217'172	0	
August	240'240	0	
September	399'240	0	
October	442'869	0	
November	417'603	0	
December	345'812	0	
year to date	**1'232'616**	**1'356'356**	**10.0%**

Chart: Monthly advertising pressure trend compared to previous year (update April)



3. Evolution advertising pressure per key market

Position	Key Market	April 2008 TCHF	April 2008 +/- PY %	2008 cumulative TCHF	2008 cumulative +/- PY %
	All key markets	**410'166**	**15.2**	**1'356'356**	**10.0**
1	Clothes / Sports / Leisure	20'167	5.8	47'877	-5.5
2	Services	20'823	10.5	89'543	17.5
3	Energy	2'672	-10.8	7'889	-13.9
4	Automotive	50'712	11.2	158'073	2.3
5	Finance / Insurances	30'274	-1.2	114'808	0.2
6	Public Benefits	7'814	3.4	30'168	6.6
7	Beverages	12'514	16.6	42'394	28.3
8	Household Devices	15'468	19.5	41'865	-1.3
9	IT	3'543	-35.1	16'660	-24.5
10	Cosmetics / Body Care	28'801	12.2	83'212	15.7
11	Furniture / House / Garden	20'994	2.1	65'101	1.5
12	Food	35'854	13.6	123'970	27.6
13	Pharma / Health	9'586	22.5	32'374	5.9
14	Political Campaigns	5'525	53.7	14'671	-5.0
15	Tobacco	1'934	40.3	3'849	-29.6
16	Telecommunications	19'952	24.7	77'687	11.7
17	Tourism / Transport	24'183	35.2	85'050	16.5
18	Entertainment Dev. / Photo / Movies	15'355	43.4	60'072	51.2
19	Watches / Jewelry	10'766	23.7	20'545	31.0
20	Other smaller markets	23'748	1.7	84'100	7.5
21	Assortment Advertising*	30'220	39.9	103'247	9.5
22	Image Advertising*	19'262	43.3	53'200	14.1

** not being allocated to a certain market*

4. Special Report: Average Quality of TV-spot position / branch

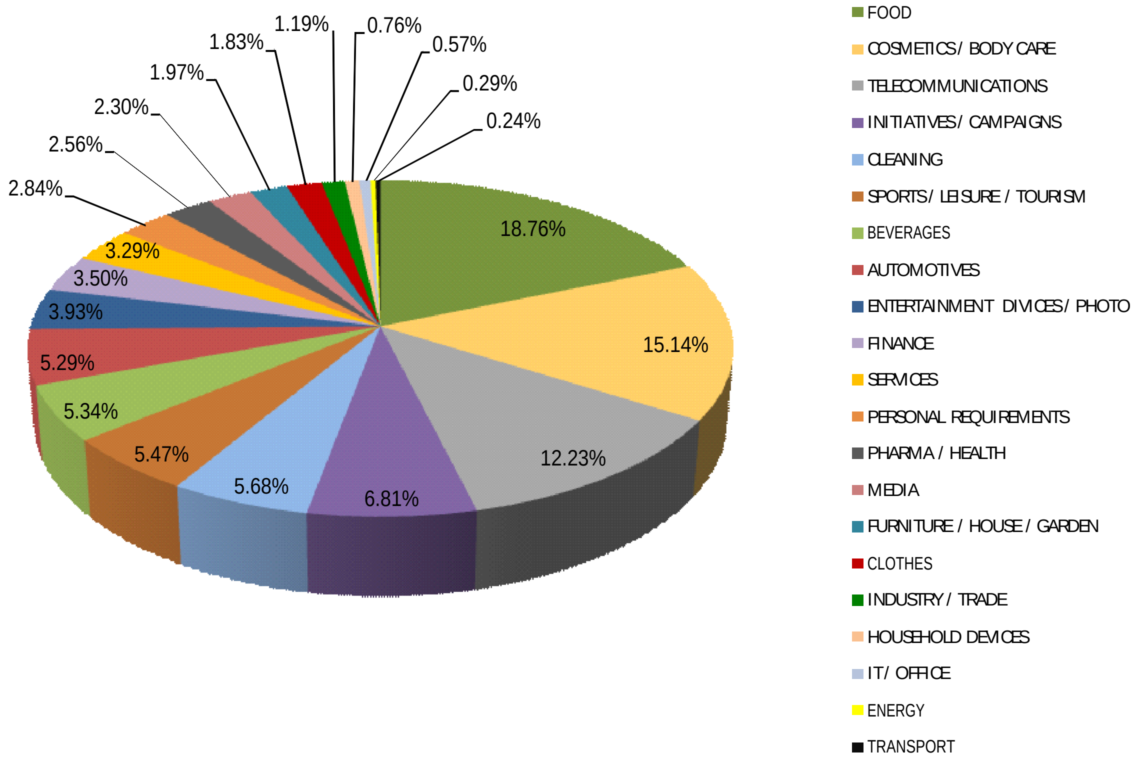
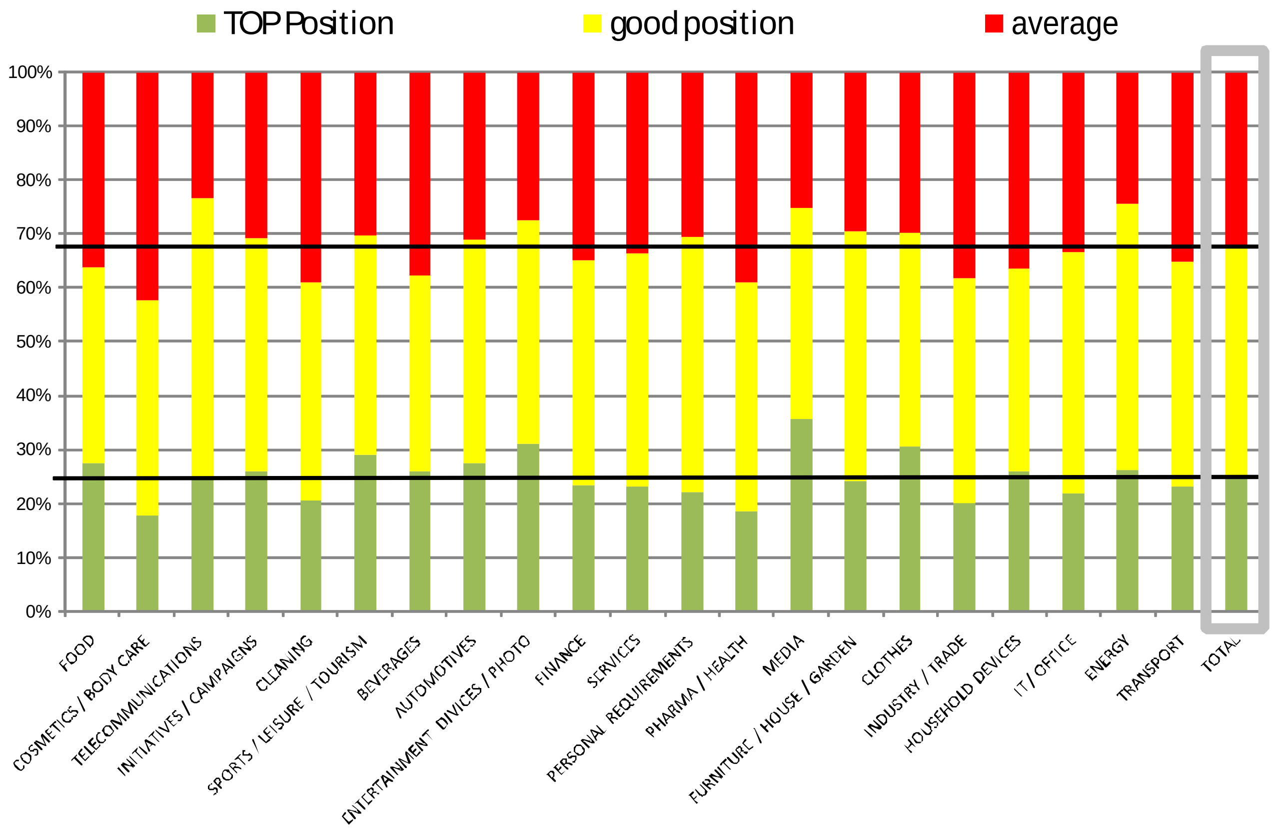


Chart 1:

The Swiss media research within TV identifies reach on block level exclusively. Booking of spot positions wanted was not applicable. Meanwhile, some changes happened, but with a view on all channels available as a whole, it would seem that a fix booking of a spot position is still challenging. In 2008 approximately 300'000 spots have been broadcasted so far. Chart 1 shows the percentaged dispersion of branches, which do TV-Advertisements to a high degree and those with less.

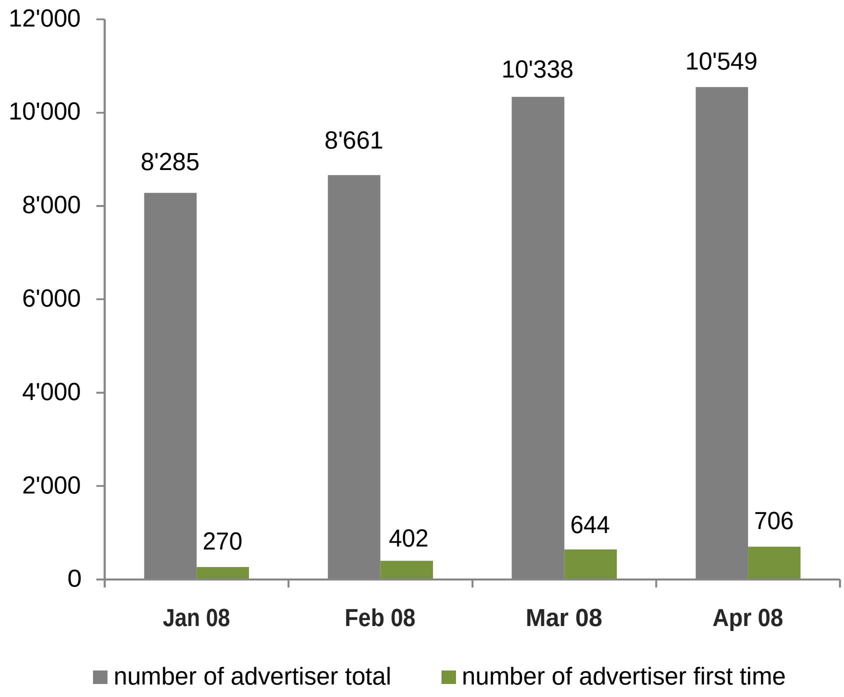


<u>Chart 2:</u>

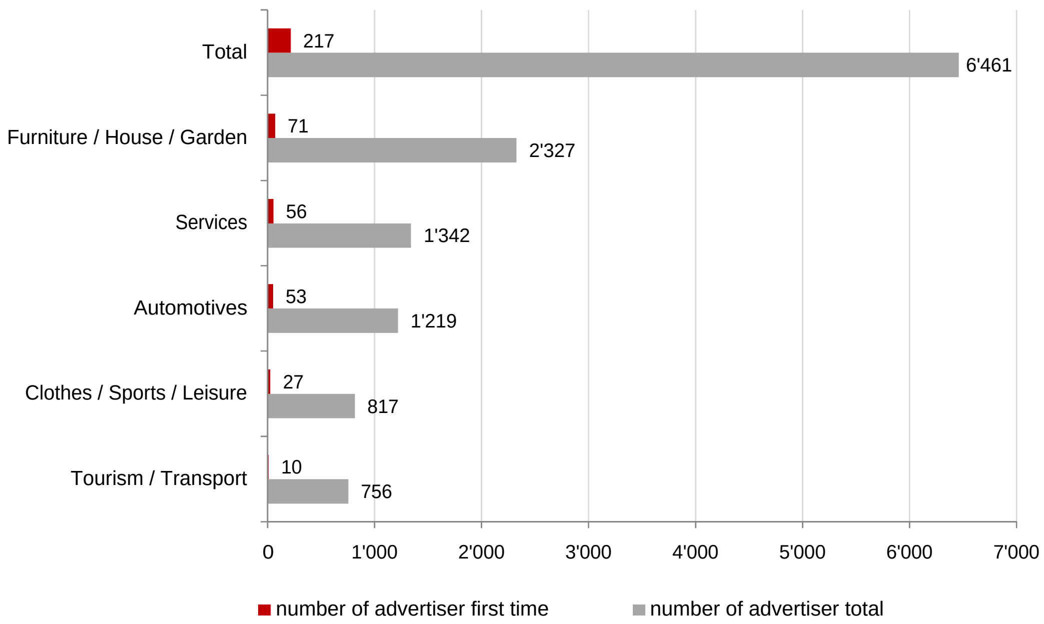
It is assumed, that the factual reach performance of a spot is influenced by the position of the respective spot within the TV-block. Media Focus Data offers the opportunity to exactly analyze (Data Access Modul P3, Insertion level) the ultimate position of spot within a TV-block. In Chart 2 all spot positions applicable have been classified. Under the group „TOP" one finds all spots, which have been identified on Position „first" or on Position „last" within a block. Category „Good" implies all spots on the following positions: Second, third, second to last and one before second to last. The Group "Average" consists of any other position not mentioned above. The Chart 2 compares the average split over all branches with specific averages of different branches.

5. Advertisers year to date

Changes number of advertiser YTD

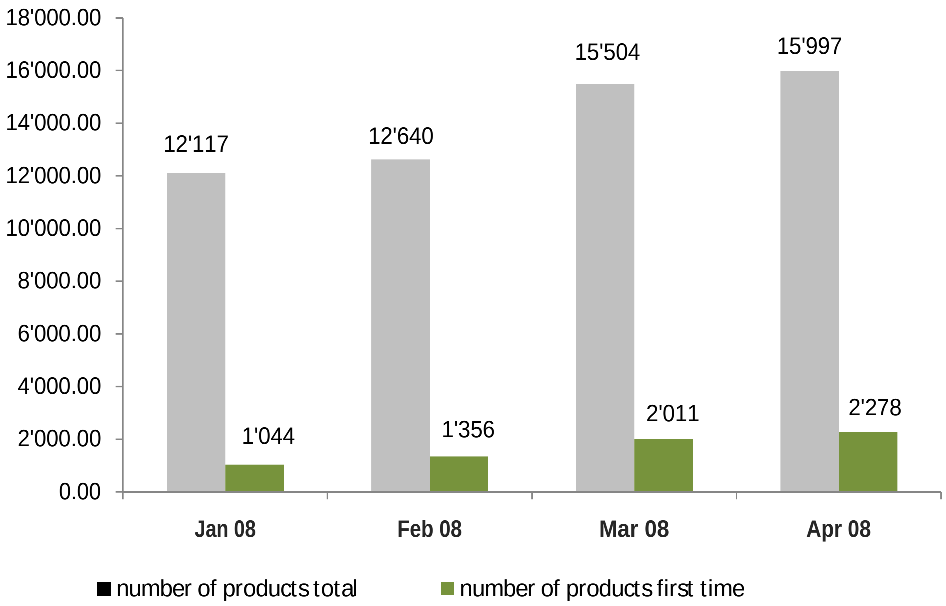


Greatest number of advertiser in april 2008 (Top 5 key markets)



6. Products year to date

Evolution number of products being advertised YTD (update April)



7. TOP 10

Top 10 advertiser (April 2008)

position	advertiser*
1	MIGROS
2	COOP
3	NESTLE
4	L'ORÉAL
5	SWISSCOM
6	UNILEVER
7	RECKITT-BENCKISER
8	TELE 2
9	IKEA
10	PEUGEOT

* product-, assortment- and image-advertising

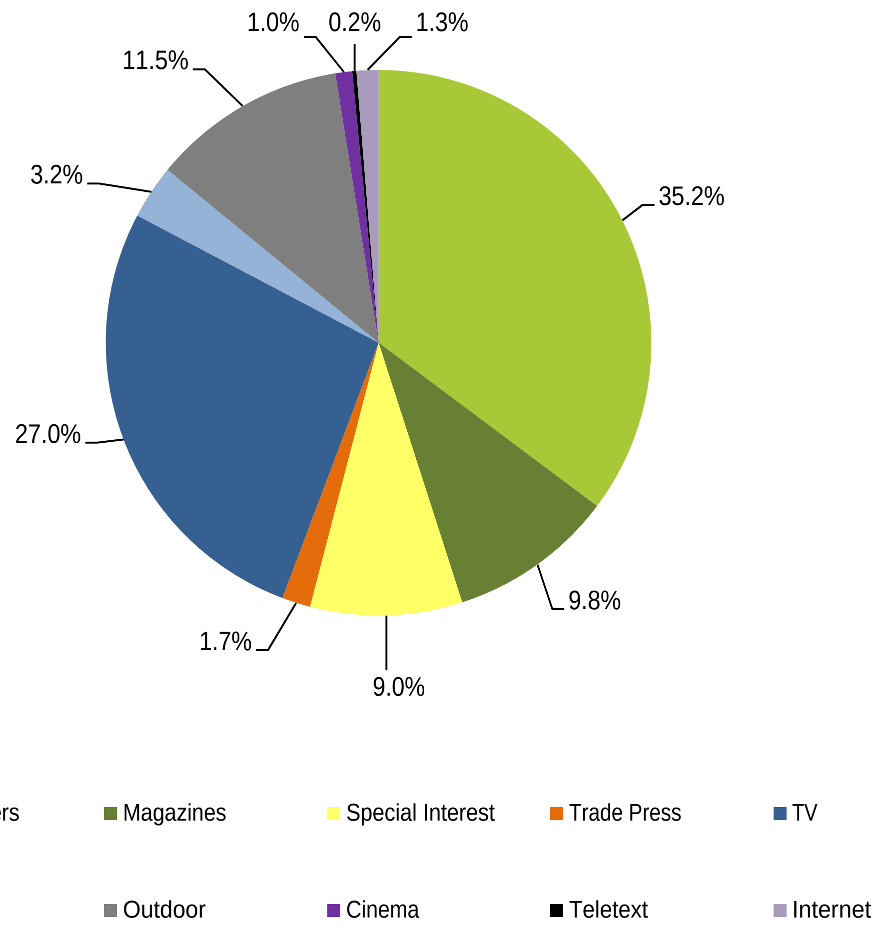
Top 10 products (April 2008)

position	products*
1	TELE2 MOBILE TARIFE
2	IKEA STOFFE
3	BLUEWIN TV
4	PEUGEOT 207 CC
5	KUONI REISEN
6	NESPRESSO ESPRESSO-KAFFEE
7	HYUNDAI I10 PKW
8	OPEL AGILA PKW
9	TAGE DIE DIE WELT BEWEGTEN DVD
10	AXA WINTERTHUR FAHRZEUGVERSICHERUNG

* product-advertising [branding];
without assortment- and image-advertising

8. Allocation of advertising pressure per media group

Chart: Allocation of advertising pressure per media group in April 2008



About Media Focus

Since 1990 Media Focus tracks the Advertising Pressure within Switzerland of any Advertisement being allocated to the following Media Groups: Newspaper, Magazines, Special Interest, TV, Radio, Outdoor, Cinema, Internet and Teletext.

The Advertising Pressure Statistic scopes the relevant Core Markets and focus is set on brands and products in terms of classification. The Swiss level of data details is unique, whereas intense and severe analyses are applicable for beneficial market insights.

The methods of the Advertising Pressure Statistic are based on „gross media tarif perspective“, i.e. clearly indicates the Pressure received by the media consumer. As such Media Focus adheres to international Standards in measuring Advertising Pressure.

As a Joint Venture of the two famous Global Research Companies - IHA-GfK AG and The Nielsen Company - Media Focus is proud of being part of worldwide leading networks in terms of Advertising Research, Consumer Panel Research, Retailer Business and Media Research.

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