

Media Focus Ad Market Trend Report 2008/08

Monthly report on Swiss advertising market

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1. Data month August 2008: Highlights

Steady advertising month August: Compared to the previous period the gross advertising pressure increased by 1.2% to a total of 231 million CHF. The cumulative total for 2008 is +5.9%.

As in July the key market **“Beverages”** benefits from an advertising intensive product launch (Rivella gelb) which lifted the market index by 34.8% (+3.0 million CHF) compared to August 2007. Yet not only the product group *non-alcoholic beverages* (+33.3%) increased significantly but also the product group *Beer* (+83.4%) almost doubled its advertising spending compared to the same period in 2007.

The unchallenged leader for the advertising year 2008 (+43.1% year to date) is the key market **“Consumer electronics / Photo / Film”** which increased its gross advertising pressure by 38,7% (+3.0 million CHF) for August 2008 compared to the same period in 2007. Analyzing this branch in detail it shows that the main growth was measured in the product groups *Film & Pay-TV* and *Photo*. Both groups increased their gross advertising pressure by 1.3 million CHF. The movie “Dark Knight” gathered within its product group *Film & Pay-TV* the top position concerning the advertising pressure. Digital reflex cameras and online-supplier for photo album and poster were the winners in the product group *Photo*.

The advertising industry didn't get a slice from the expected winnings in the product market **“Energy”**. The advertising pressure decreased by 24.3%. Year to date the cumulative total is -20.4% (-3.8 million CHF).

Positively results were also seen for the advertising markets **„Tobacco“ (+100.3%)**, **„Services“ (+22.4%)** and **„Cosmetics / Personal Hygiene“ (+16.9%)** compared to August 2007.

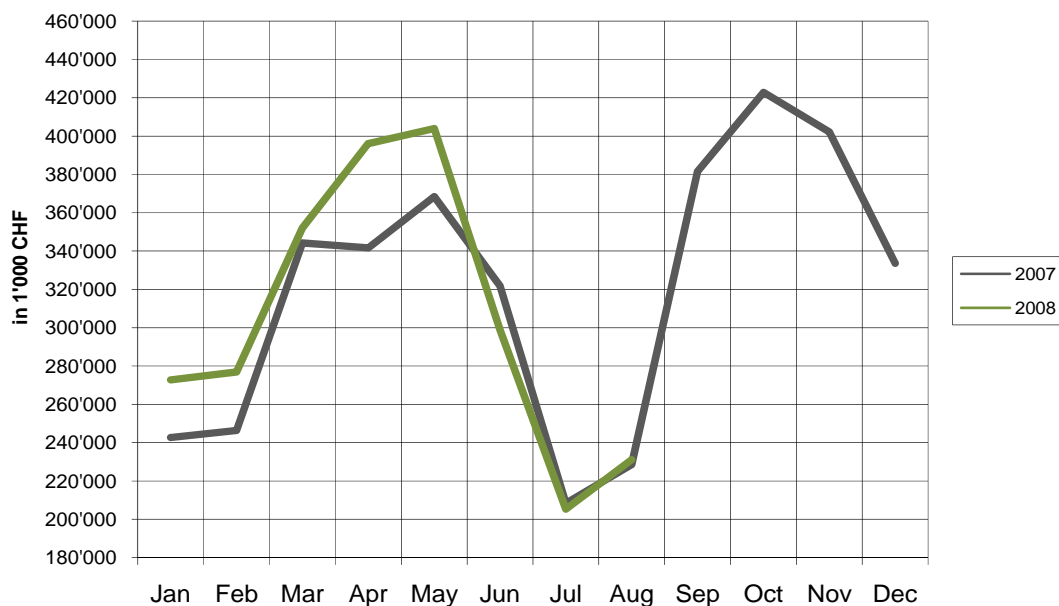
2. Evolution advertising pressure total market

Chart: Advertising pressure trend 2008 (update August)

month	2007	2008	+/- %
	TCHF	TCHF	
January	242'682	272'749	12.4%
February	246'255	276'933	12.5%
March	344'228	351'919	2.2%
April	341'565	395'991	15.9%
May	368'368	403'970	9.7%
June	321'671	298'722	-7.1%
July	208'287	205'276	-1.4%
August	228'445	231'074	1.2%
September	381'352	0	
October	422'770	0	
November	402'162	0	
December	333'466	0	
year to date	2'301'500	2'436'634	5.9%

To avoid instability in the trend analyzes, the branch *Events* is not part of the monthly Advertising Market Trend until May 2009. (till back data are available)

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

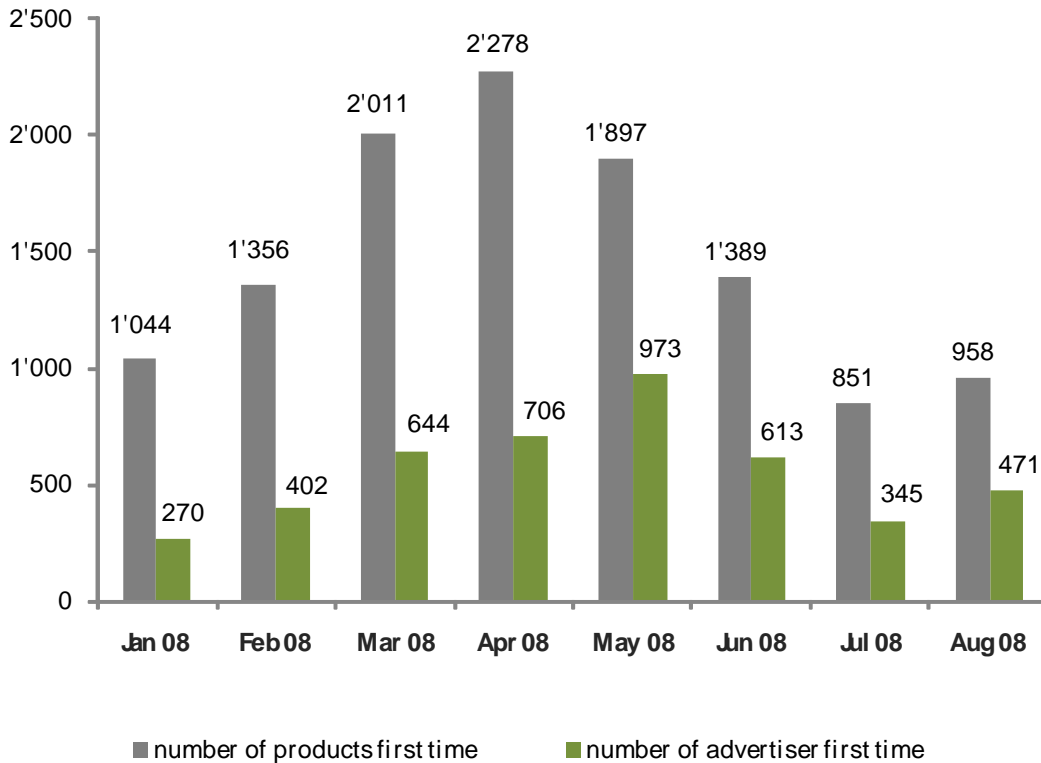


3. Evolution advertising pressure per key market

Position	Key Market	August 2008		2008 cumulative	
		TCHF	+/- PY %	TCHF	+/- PY %
	All key markets	231'074	1.2	2'436'634	5.9
1	Clothes / Sports / Leisure	7'867	15.3	75'421	-7.5
2	Services	14'522	20.6	127'655	12.8
3	Energy	1'184	-24.3	14'818	-20.4
4	Automotive	14'595	-12.4	253'794	6.1
5	Finance / Insurances	22'025	-2.5	209'005	-8.3
6	Public Benefits	5'893	-6.4	53'856	3.1
7	Beverages	11'621	34.8	94'407	7.3
8	Household Devices	8'504	-11.8	82'864	3.4
9	IT	2'335	-37.2	27'947	-25.1
10	Cosmetics / Body Care	18'034	16.9	170'058	10.6
11	Furniture / House / Garden	8'824	-18.1	107'065	-3.5
12	Food	20'683	-6.2	227'553	4.7
13	Pharma / Health	4'821	-10.0	66'943	4.4
14	Political Campaigns	3'732	1.2	32'276	16.6
15	Tobacco	472	100.3	8'691	-5.5
16	Telecommunications	10'228	-7.3	138'317	5.1
17	Tourism / Transport	13'874	0.9	144'457	10.6
18	Entertainment Dev. / Photo / Movies	10'863	38.7	113'527	43.1
19	Watches / Jewelry	2'672	34.4	37'557	28.1
20	Other smaller markets	17'046	-3.6	164'086	8.9
21	Assortment Advertising*	24'500	9.5	186'677	10.5
22	Image Advertising*	6'778	-18.3	99'656	11.2

* not being allocated to a certain market

4. New advertiser and products year to date



5. TOP 10

Top 10 advertiser (August 2008)

position	advertiser*
1	MIGROS
2	COOP
3	PROCTER & GAMBLE
4	L'OREAL
5	MANOR
6	COCA COLA BEVERAGES
7	SWISSCOM
8	RECKITT-BENCKISER
9	DIE POST
10	IKEA

* product-, assortment- and image-advertising

Top 10 products (August 2008)

position	products*
1	AXA WINTERTHUR FAHRZEUGVERSICHERUNG
2	FELDSCHLOESSCHEN ALKOHOLFREI
3	THE DARK KNIGHT
4	SUVA RISK UNFALLVERSICHERUNG
5	RIVELLA GELB
6	SWISSCOM MOBILE NATEL LIBERTY MEZZO
7	COCA COLA ZERO
8	OMEGA UHREN
9	TOTAL WASCHMITTEL
10	COCA COLA LIGHT

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

6. Allocation of advertising pressure per media group

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

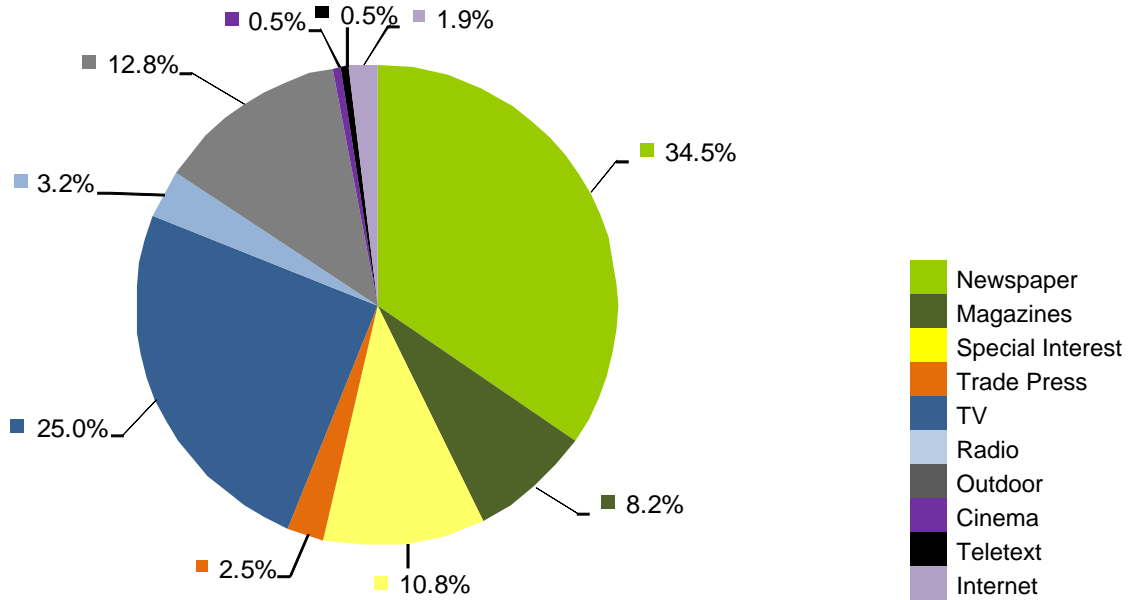


Chart: Allocation of advertising pressure per media group Year to Date as per August 2008

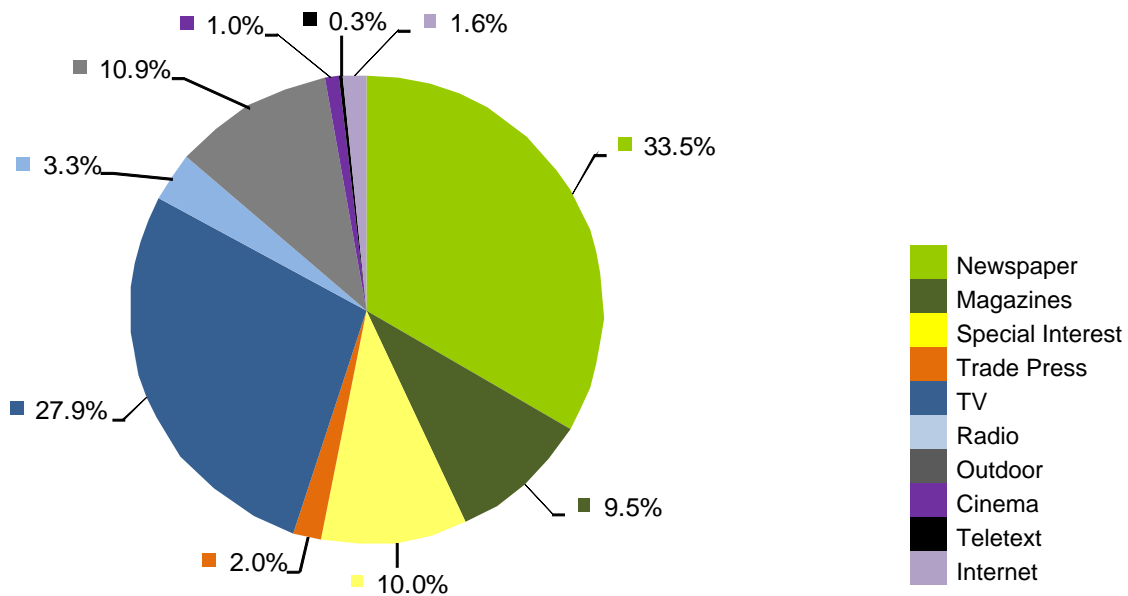
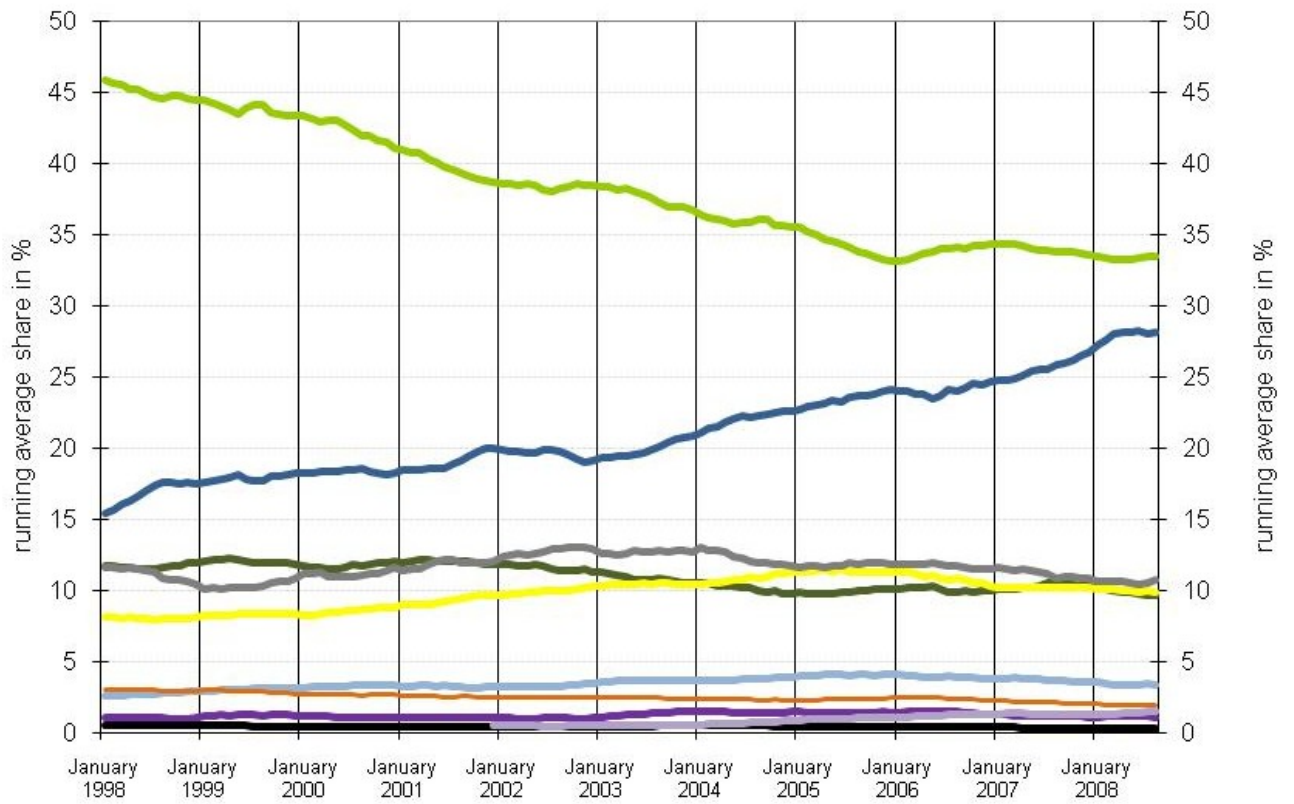


Chart: Monthly running average advertising pressure allocation in the media groups



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, Trade Press, 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 tariff 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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