

Media Focus Ad Market Trend Report 2008/12

Monthly report on Swiss advertising market

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1. Data month December 2008: Highlights

Despite a negative trend of 1.1% in December the complete 2008 results in a positive trend thanks to some good months in the first half of the year.

The plus of 2.6% in 2008 is an average value in the 10-years analyses perspective and leads to a nonspecific remark in the statistic books regardless of the international finance- and economic crises. There are no clear signs of a spillover from the recession to the advertising market. Only TV seems to suffer by decreasing advertising-gross spending in the third consecutive month. Cinema has a minus of 10% within the complete year 2008.

„Pharma / Health“ had a 27.2% plus in December but isn't placed on the 2008 podium with the full year result of +10.2%. This result leads to fourth place growth in 2008 for all markets.

The annual wave of influenza leads to higher advertising pressure for the sector pharma. To support the challenge for being top-of-mind during the high season there has been nearly 1.5 million CHF advertising activities in December. This is equivalent to a growth of 310'000 CHF or 26.5%.

With 15.5% growth, the key market **„Entertainment Dev./ Photo/ Motion Pictures “** has been the most competitive sector in 2008. Not even a decrease of 9.5% in December has threatened the leader position.

Segments which supported the leader position in an extraordinary way are: *SLRs digital* (+8.5 million CHF; +324.4%), *Movies* (+8.0 million CHF; +19.5%) and *CD's (recorded)* (+5.7 million CHF; +27.5%).

For the second month, the key market **„Household Devices“** reported an increase of more than 25%. As an effect of the December growth of 27.2% the full year comparison steps up to a level of +4.8%.

The advertising markets **„Political Campaigns“ (+99.5%)** and **„Public benefits“ (+16.4%)”** also closed with a positive result compared to the previous period in 2007.

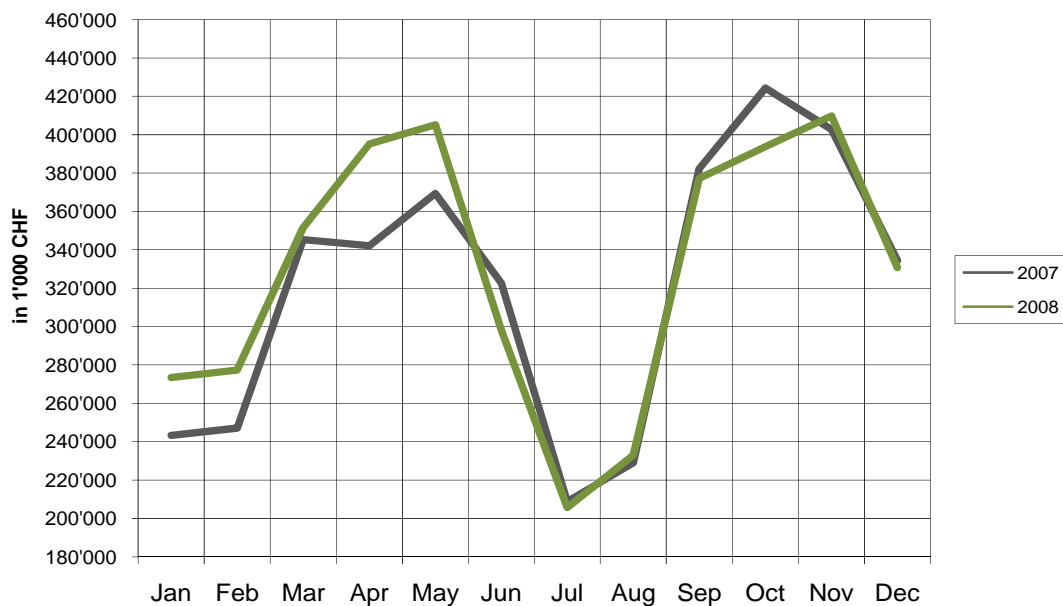
2. Evolution advertising pressure total market

Chart: Advertising pressure trend 2008 (update December)

Month	2007	2008	+/- %
	TCHF	TCHF	
January	243'300	273'314	12.3%
February	247'120	277'265	12.2%
March	345'327	351'549	1.8%
April	342'173	395'163	15.5%
May	369'299	405'163	9.7%
June	322'634	298'076	-7.6%
July	208'715	205'642	-1.5%
August	228'964	232'809	1.7%
September	382'249	377'257	-1.3%
October	424'433	393'825	-7.2%
November	402'786	409'762	1.7%
December	334'313	330'683	-1.1%
year to date	3'851'311	3'950'508	2.6%

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 December)

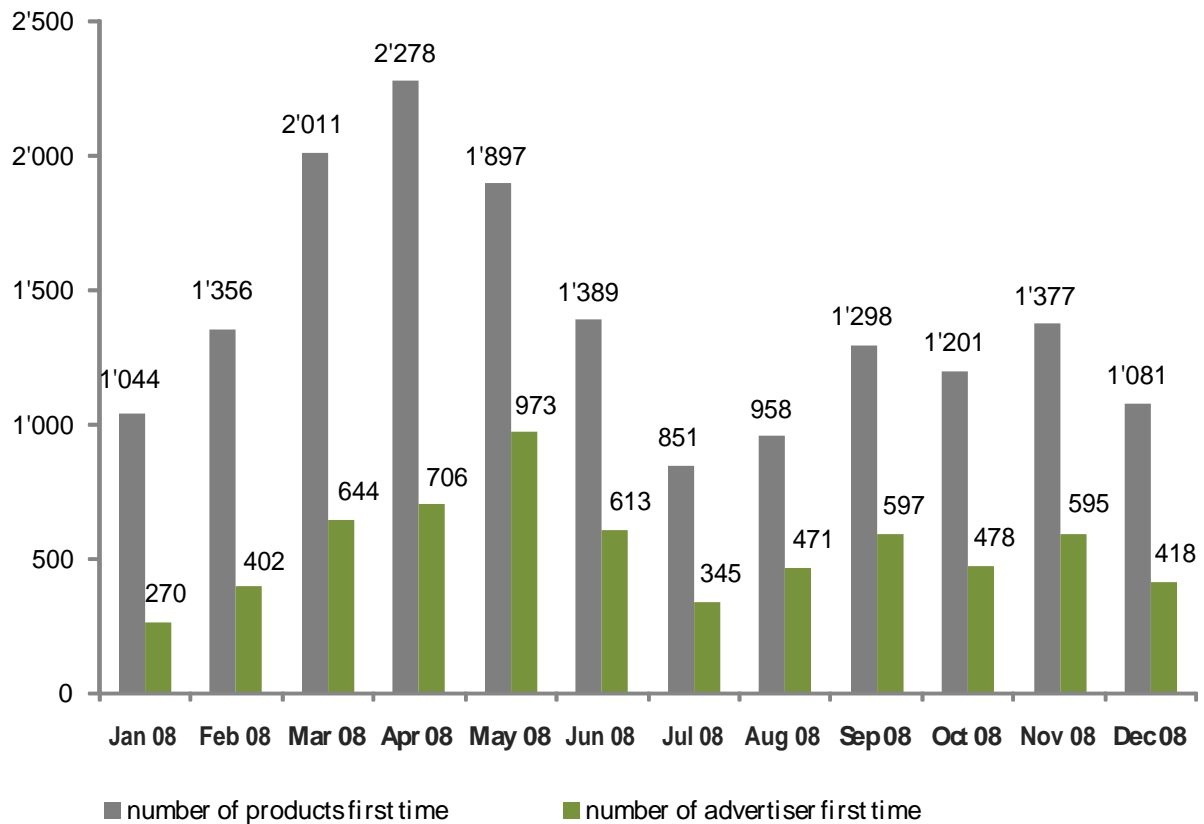


3. Evolution advertising pressure per key market

Position	Key Market	December 2008		2008 cumulative	
		TCHF	+/- PY %	TCHF	+/- PY %
	All key markets	330'683	-1.1	3'950'508	2.6
1	Clothes / Sports / Leisure	7'959	8.1	129'428	-3.8
2	Services	13'715	4.5	197'064	10.7
3	Energy	1'925	-34.0	25'525	-11.9
4	Automotive	19'189	3.3	392'338	3.6
5	Finance / Insurances	21'105	1.8	359'946	-8.3
6	Public Benefits	9'016	16.4	90'854	7.4
7	Beverages	16'201	-4.0	146'146	1.3
8	Household Devices	11'135	27.2	139'012	4.8
9	IT	4'357	-31.3	45'542	-20.9
10	Cosmetics / Body Care	28'013	-2.5	285'649	11.1
11	Furniture / House / Garden	12'878	0.3	174'786	-3.6
12	Food	28'711	-9.9	364'111	4.5
13	Pharma / Health	10'823	27.2	110'285	10.2
14	Political Campaigns	3'728	99.5	61'093	-4.5
15	Tobacco	476	-56.0	14'524	-0.8
16	Telecommunications	22'132	-13.2	221'854	-5.1
17	Tourism / Transport	16'521	-1.3	223'029	7.5
18	Entertainment Dev./ Photo/ Motion Pictures	16'948	-9.5	170'751	15.5
19	Watches / Jewelry	14'501	-9.0	79'733	7.5
20	Other smaller markets	32'412	11.8	283'602	5.3
21	Assortment Advertising*	24'009	8.4	276'616	6.2
22	Image Advertising*	14'927	-21.2	158'619	-1.4

* not being allocated to a certain market

4. New advertiser and products year to date



5. TOP 10 actual month

Top 10 advertiser

position	advertiser*
1	COOP
2	MIGROS
3	L'ORÉAL
4	NESTLE
5	PROCTER & GAMBLE
6	SWISSCOM
7	UNILEVER
8	SUNRISE COMMUNICATIONS
9	UBS
10	DIE POST

* product-, assortment- and image-advertising

Top 10 products

position	products*
1	NESPRESSO ESPRESSO KAFFEE
2	UNIVERSAL MUSIC CD'S BESPIELT
3	MILLIONEN LOS
4	BLUEWIN TV
5	NESCAFE DOLCE GUSTO KAFFEEMASCHINE
6	ORANGE OPTIMA
7	SUNRISE MOBILE ZERO PLUS TARIF
8	SONY ERICSSON CYBER-SHOT C 905 HANDY
9	COCA COLA
10	RENAULT LAGUNA COUPE

* 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 December 2008

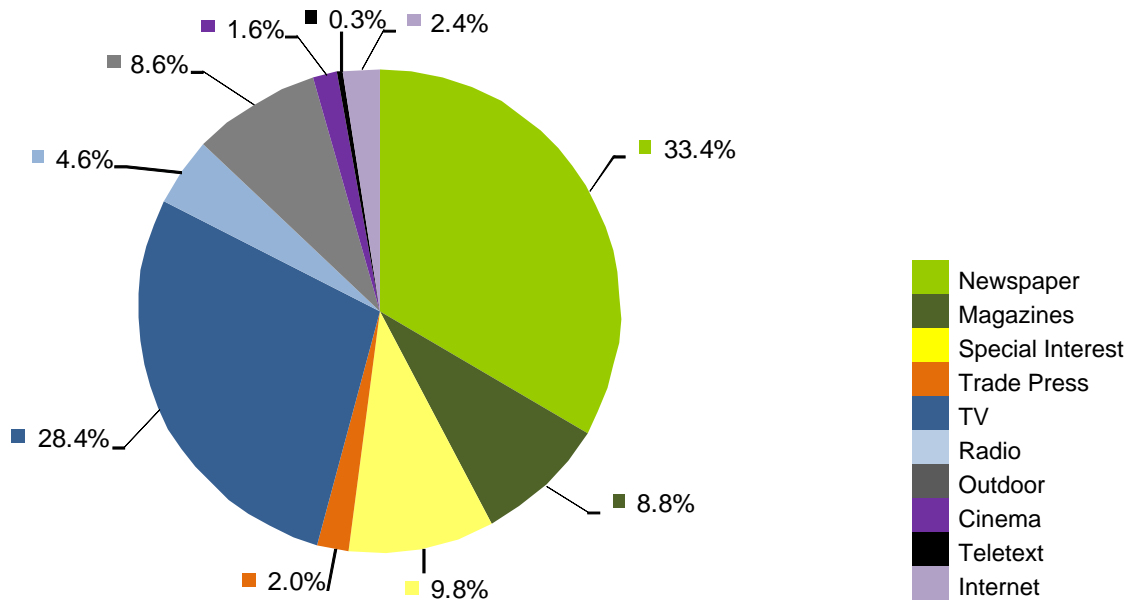


Chart: Allocation of advertising pressure per media group Year to Date as per December 2008

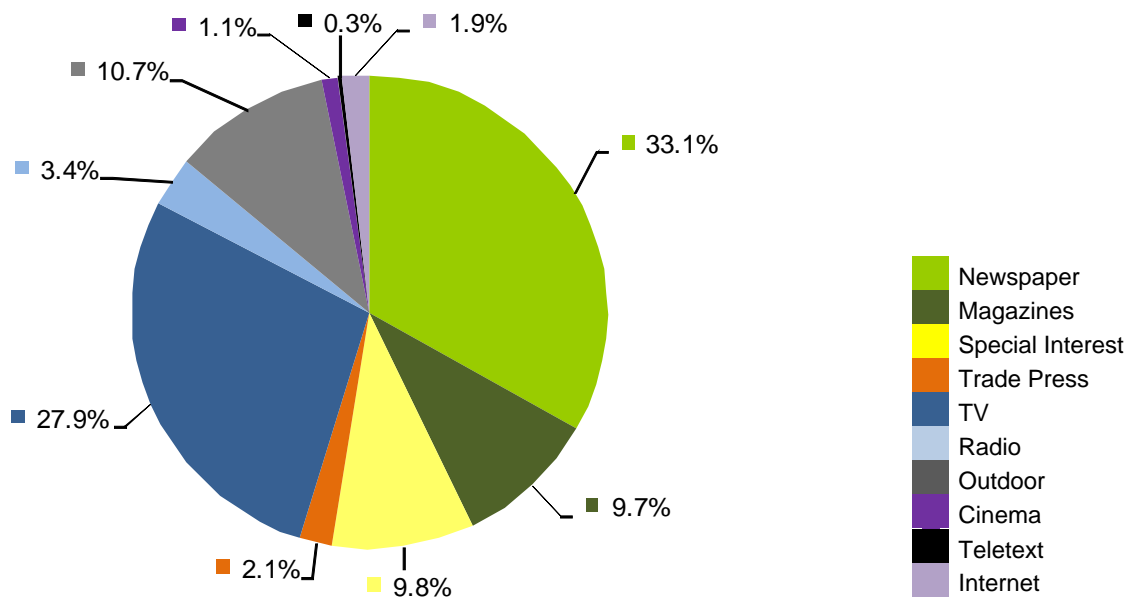
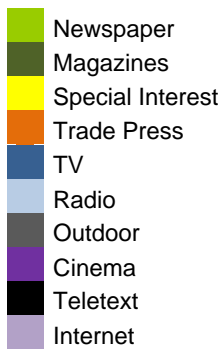
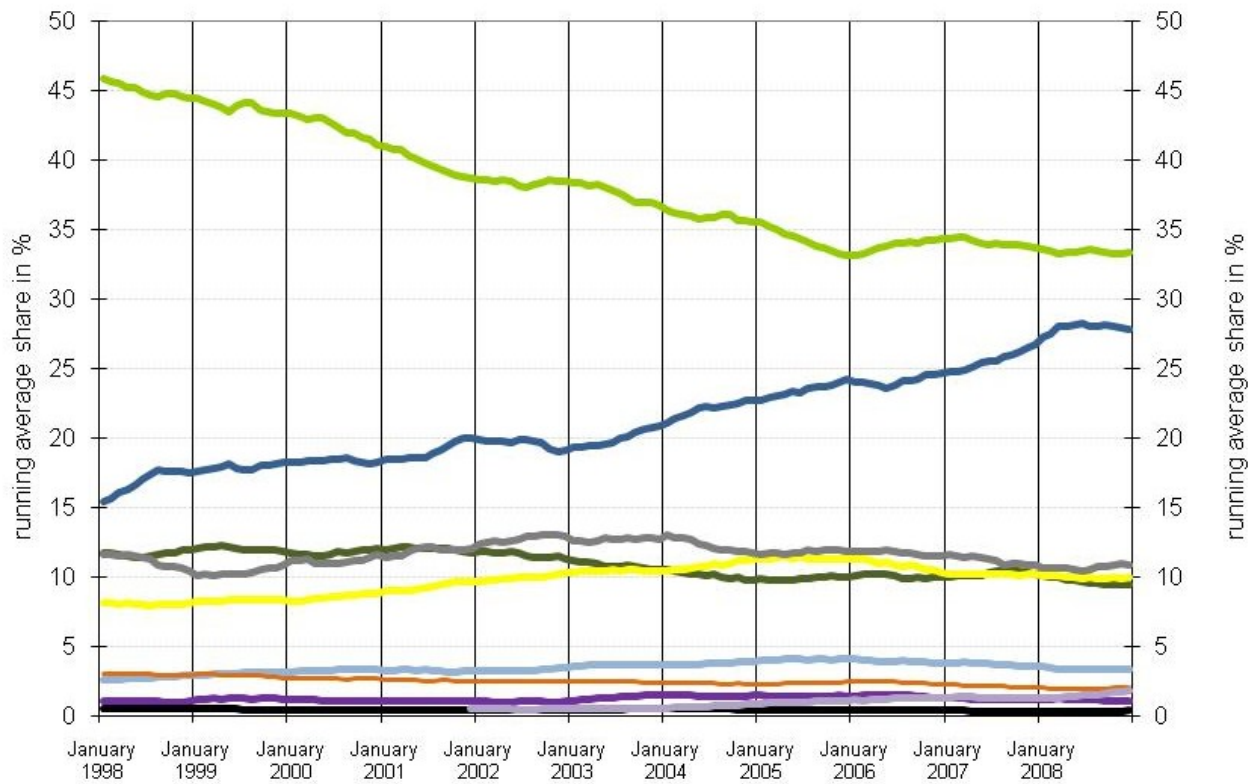


Chart: Monthly running average advertising pressure allocation in the media groups



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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