

# Media Focus Ad Market Trend 2008/02

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## Monthly Report on the Swiss Advertising Market

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### February 2008 - Highlights:

- ▶ February was a very good advertising month: advertising impact increased by 11.7% compared to the same period in the previous year.
- ▶ Several advertising markets have experienced noticeable developments compared to February 2007:

**„Consumer Electronics/Photo/Film“** is the sector with the biggest growth in advertising in comparison to the same period in the previous year with a plus of 57.9% (+5.5 million CHF). This astonishes even more as January growth was already 57.6%.

One of the biggest players in this sector is the film industry with a plus of 2.8 million (+93.8%) for entertainment. The strike of the American writers didn't have any negative impact on the gross advertising spending yet. The media group *Cinema* had a brilliant take off in 2008 (+89% in February).

*Digital Cameras* (+334 TCHF) and *Photo-Internet* (+ 516 TCHF), for example [www.ifolor.ch](http://www.ifolor.ch), recorded the strongest growth within the photo industry.

When analyzing the gross advertising spending for the key market "**Beverages**" in February, it shows directly, which effects are responsible for the enormous growth of 33.9% (+2.2 million CHF). One reason is the EM 2008, where the beverage industry focuses their advertising spending. Already 19% of the gross advertising pressure is linked to this huge event. This leads to the fact, that mainly the official football-EM sponsors in the category *Image* are responsible for the growth of +77.8% (1.7 million CHF).

The highest decrease was noticed in the key market „**IT**“ with a minus of 48.3% (-3.4 million CHF) compared to the same period in 2007. *Notebooks* -43.6% (-1.0 million CHF) and *Software* -73.6% (-1.8 million CHF) are the two low performing segments within this key market.

The advertising markets „**Food (+38.2%)**“, „**Public Campaigns (+28.2%)**“, „**Watches/ Jewelry (+28.4%)**“, „**Telecommunication (+27.9%)**“ and „**Cosmetics/ Body Care (+26.8%)**“ all increased significantly compared to the same period in the previous year.

- ▶ The media groups Newspapers, TV and Cinema experienced an above-average growth this month. The cumulated total for January and February 2008 shows that Cinema and TV grew above-average.

## Development of Advertising Pressure Total Market

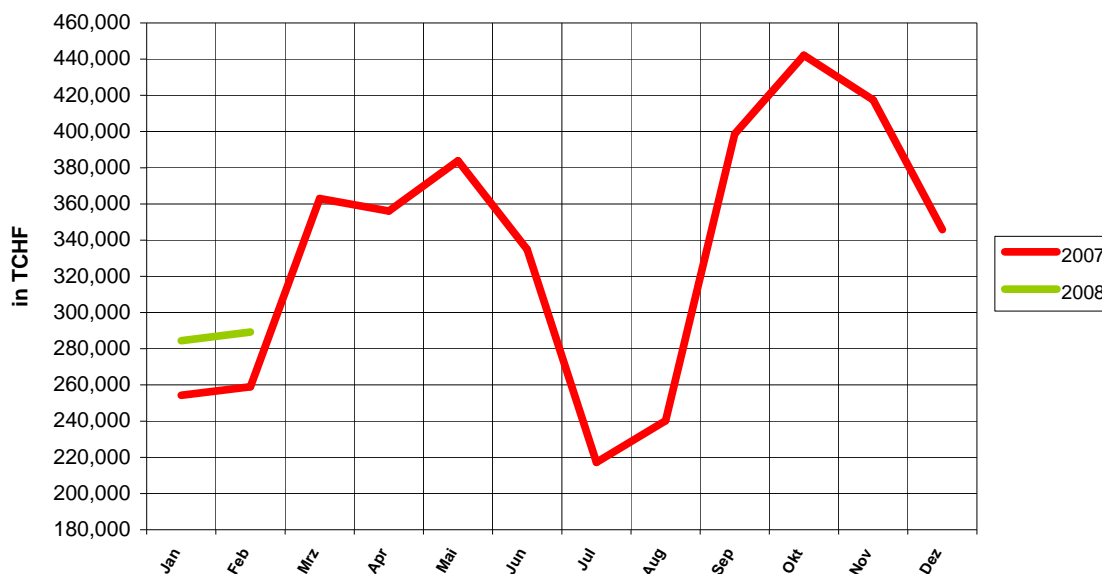
Chart: Advertising Pressure Trend as per February 2008

month	2007 TCHF	2008 TCHF	+/- %
January	254,315	284,483	11.9%
February	258,940	289,257	11.7%
March	363,013		
April	356,097		
May	383,859		
June	334,981		
July	217,203		
August	240,240		
September	398,704		
October	442,148		
November	417,499		
December	345,823		
year to date	513,255	573,740	11.8%

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Chart: Monthly Advertising Pressure Trend compared to the Previous Year

Development of Advertising Pressure 2007 / 2008



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## Timely progression of Advertising Pressure

Chart: Development of Advertising Pressure actual Month versus last 10 Years

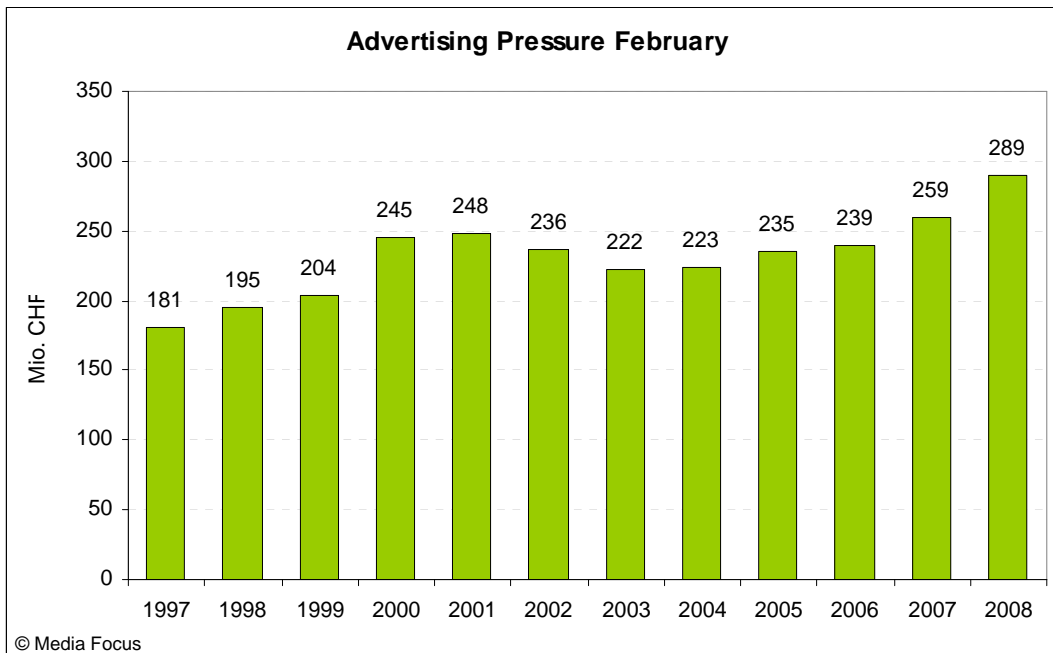
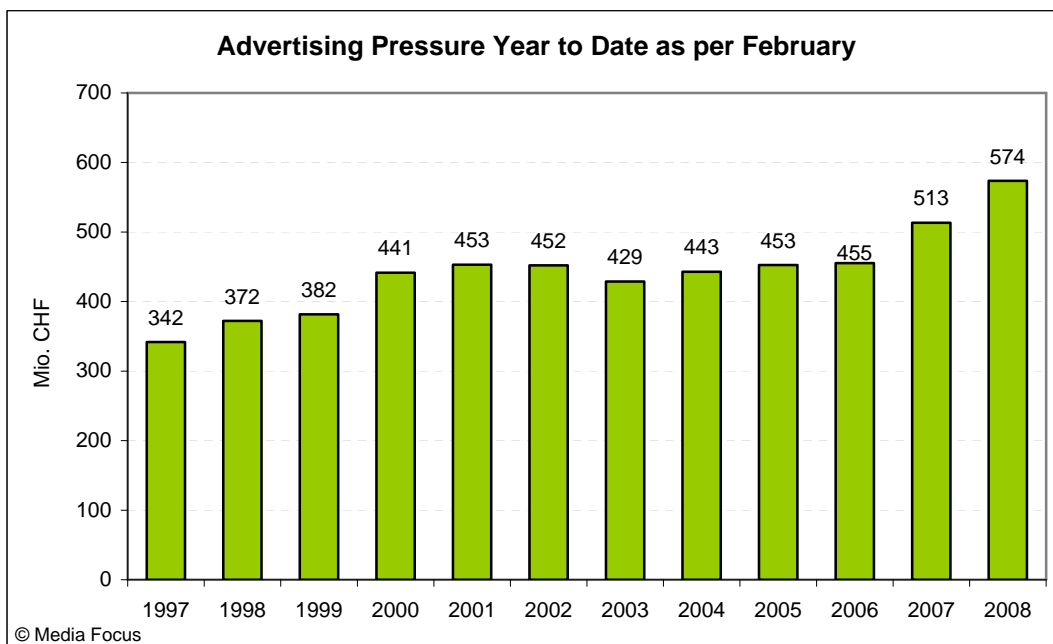


Chart: Development of Advertising Pressure Year to Date versus last 10 Years



## Allocation of Advertising Pressure per Media Group

Chart: Allocation of Advertising Pressure per Media Group in February 2008

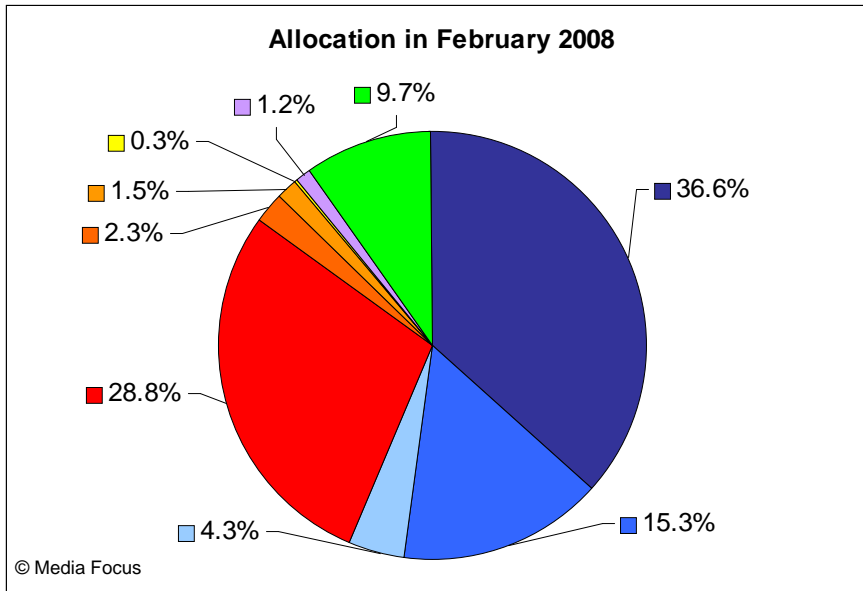
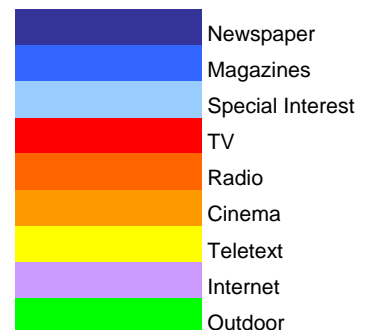
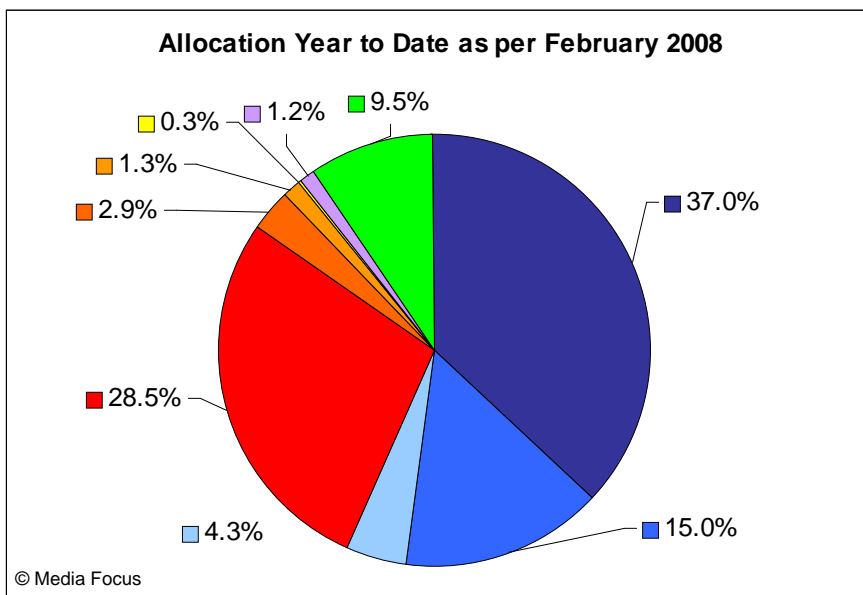
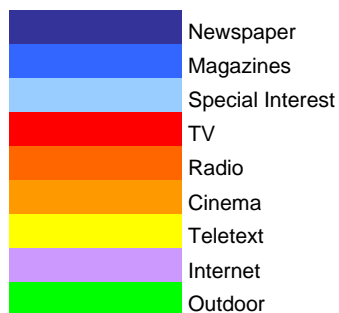
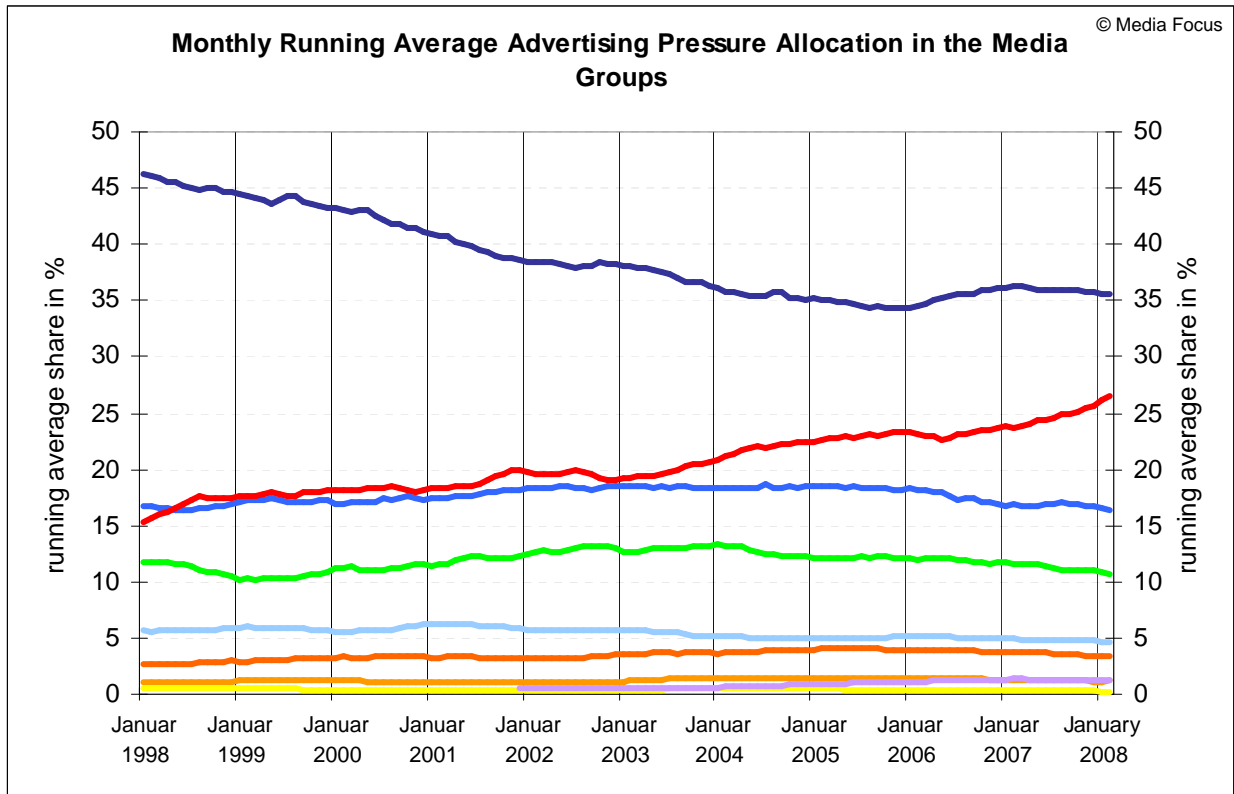


Chart: Allocation of Advertising Pressure per Media Group Year to Date



## Development / Comparison of Advertising Pressure over a Period of 10 Years

Chart: Development of Advertising Pressure per Media Group as per February 2008



## Development of Advertising Pressure per Key Market

Chart: Actual Status versus Previous Year versus cumulative February 2008

Pos.	Key Market	February 2008		2008 cumulative	
		TCHF	+/- PY %	TCHF	+/- PY %
<b>All Key Markets</b>		<b>289,257</b>	<b>11.7</b>	<b>573,740</b>	<b>11.8</b>
1	Clothes, Sports, Leisure	4,233	-14.2	8,973	-10.3
2	Services	22,444	33.6	44,170	33.2
3	Energy	1,569	7.1	2,896	2.7
4	Automotive	35,114	4.4	66,912	11.2
5	Finance / Insurances	26,092	1.2	52,272	-1.4
6	Public Benefits	6,592	28.8	14,568	18.0
7	Beverages	8,874	33.9	17,649	36.1
8	Household Devices	7,706	-8.0	14,324	-16.4
9	IT	3,645	-48.3	7,903	-29.9
10	Cosmetics / Body Care	17,844	26.8	31,338	14.4
11	Furniture, House / Garden	11,871	-5.1	24,546	1.4
12	Food	27,604	38.2	52,924	45.6
13	Pharma / Health	6,712	-15.0	15,879	3.2
14	Political Campaigns	4,259	11.9	6,728	27.8
15	Tobacco	478	-40.8	922	-48.9
16	Telecommunications	18,851	27.9	34,350	3.4
17	Tourism, Transport	17,912	8.3	40,357	16.9
18	Entertainment Dev. Photo	14,869	57.9	28,705	59.4
19	Watches Jewelry	2,245	28.4	4,689	48.8
20	Other smaller Markets	18,926	24.6	37,218	20.0
21	Assortment Advertising*	20,794	3.2	47,189	-4.6
22	Image Advertising*	10,624	-13.6	19,229	-6.6

\* those not being allocated to a certain market

## TOP Companies generating Advertising Pressure February 2008

Chart: Top 30 and share of total market

Rang	Retailer
1	MIGROS
2	COOP
3	NESTLE
4	SWISSCOM
5	L'OREAL
6	SUNRISE COMMUNICATIONS
7	ORANGE COMMUNICATIONS
8	PROCTER & GAMBLE
9	MARS
10	TOYOTA
11	RENAULT
12	FIAT
13	COCA COLA BEVERAGES
14	MEDIA MARKT
15	FUST
16	MC DONALD'S
17	RECKITT-BENCKISER
18	UNILEVER
19	UIP
20	DENNER
21	DANONE
22	PEUGEOT
23	VW
24	ALDI SUISSE
25	BEIERSDORF
26	CREDIT SUISSE
27	BMW
28	MMC AUTOMOBILE
29	SWISSLOS
30	AUDI



CHF 103.9 millions  
= 35.9 % of the Total Market

<sup>3</sup> Media Focus differentiates Advertising Pressure of Production / Servicing Companies from Retailer. The Brand Advertising could also be effected through Retailer (i.e. Retailer Bucherer for Brand Rolex). The Company / Product Relationship within the Data Base remains untouched, thus Rolex Geneva is the producing Company of Rolex Products / Watches. However, Media Focus additionally identifies the respective Retailer, where the advertisement is obviously steered through retailer activities.

## 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.

## Contact

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