

Media Focus Ad Market Trend 2008/01

Monthly Report on the Swiss Advertising Market

January 2008 - Highlights:

- ▶ January was a very good advertising month: advertising impact increased by 10.1% compared to the same period in the previous year.
- ▶ Several advertising markets have experienced noticeable developments compared to January 2007:

„Watches/Jewellery“ is the sector with the strongest growth in advertising in comparison to the same period in the previous year with a plus of 75.1% (+1 million CHF). The top 10 companies only hold 44% of the gross advertising pressure in January but are responsible for 75% of

growth within this sector compared to the previous period. The market “Watches and Jewellery” is retailer driven: 1/3 of the gross advertising pressure came from retailers within this market.

A glance at the key market “**Food**” follows with a strong positive trend of +53.7% (+8.8 million CHF) for January 2008. A plus of 3.5 million CHF gross advertising pressure is seen in the product assortment advertising, literally all ads with more than five products in different product groups, also known as “pork-belly-ad”.

Further product groups with strong growth in the food market were “*Diary products yellow line, Sauce, Soups & Flavor and Chocolate & Sweets* (all product markets with a growth of more than one million CHF).

Another winning sector in January 2008 is „**Consumer Electronics/Photo/Film**” with a plus of 57.6% (+4.9 million CHF) compared to January 2007. One key market in this sector was *Film*, which had a growth of 99%. This is comparable with an increase of 2.7 million CHF in gross advertising pressure. More than 15 movies were promoted with more than 100'000 CHF only in January 2008. The stories of the leading three movies, which were promoted, are about love stories, legends and a strange little shop.

The advertising markets „**Political Campaigns (+67.8%)**“, „**Beverages (+35.6%)**“, „**Services (+28.2%)**“, „**Pharmacy/Health (+20.7%)**“ and „**Tourism/Transportation (+20.3%)**“ all increased significantly compared to the same period in the previous year.

- ▶ The media groups TV and Cinema experienced an above-average growth.

Development of Advertising Pressure Total Market

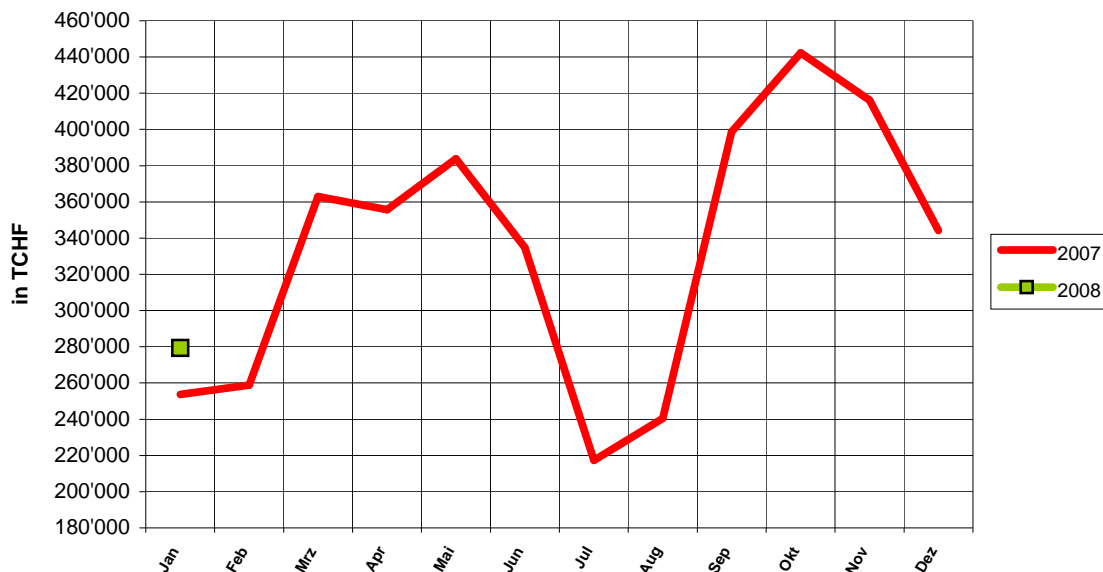
Chart: Advertising Pressure Trend as per January 2008

month	2007 TCHF	2008 TCHF	+/- %
January	253'707	279'370	10.1%
February	258'770		
March	362'909		
April	355'707		
May	383'774		
June	334'845		
July	217'285		
August	240'435		
September	398'647		
October	442'317		
November	416'152		
December	344'166		
year to date	253'707	279'370	10.1%

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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

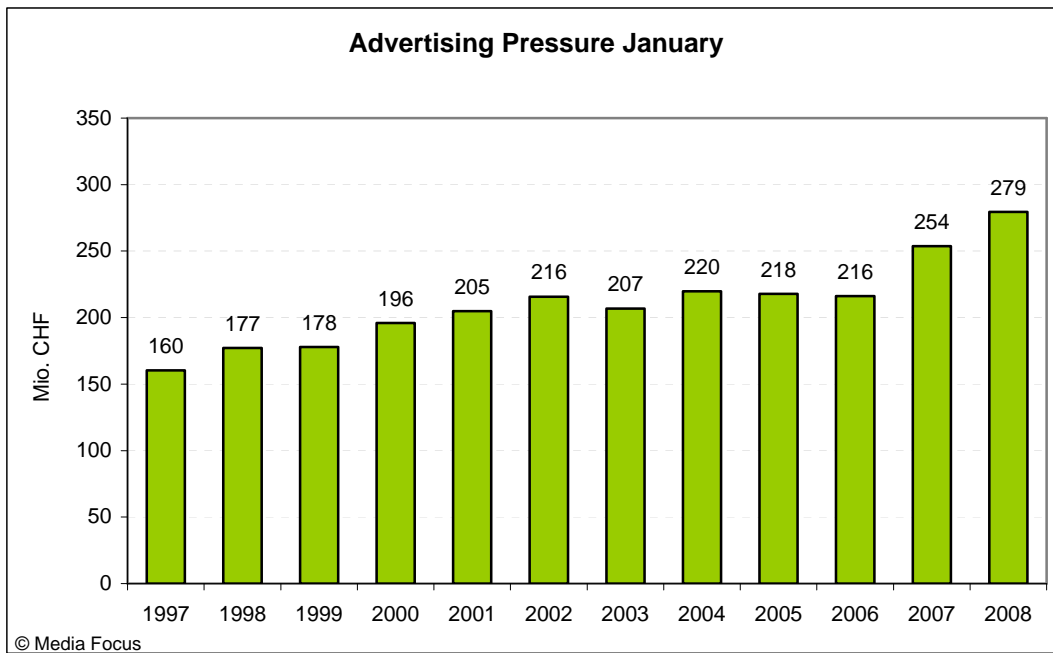
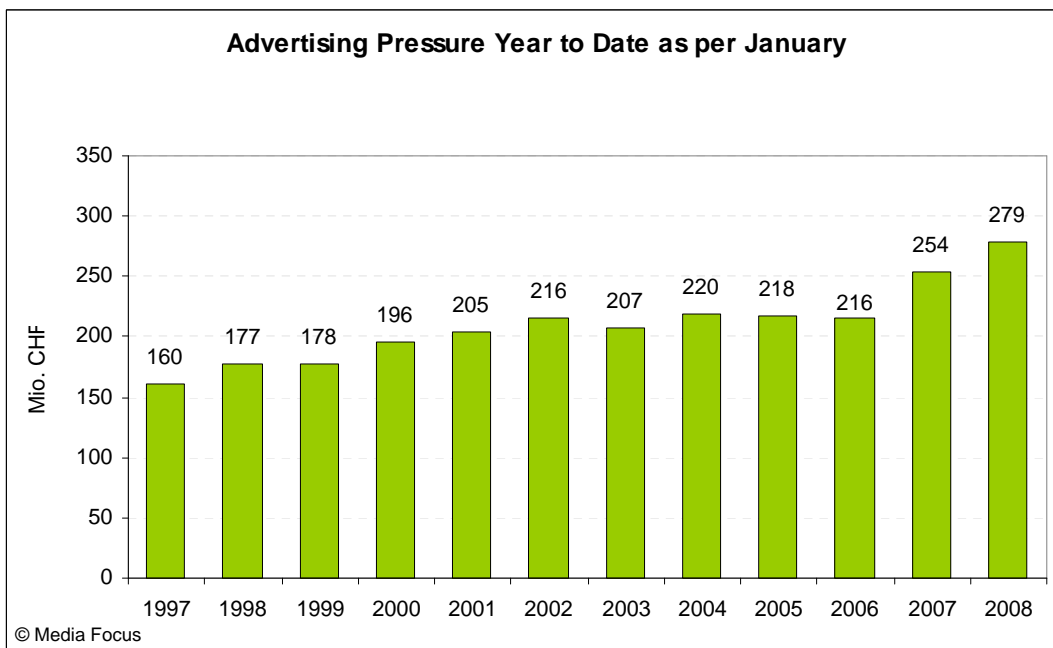


Chart: Development of Advertising Pressure Year to Date versus last 10 Years



Allocation of Advertising Pressure per Media Group

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

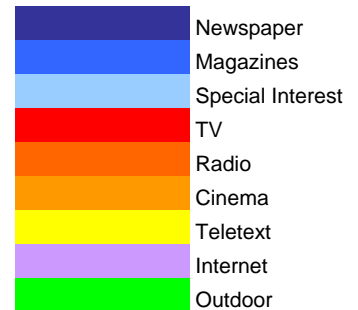
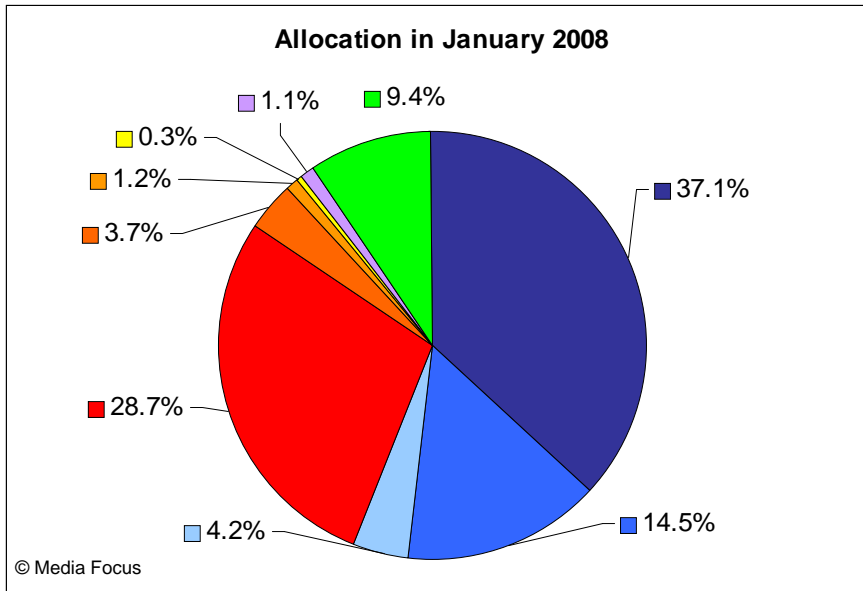
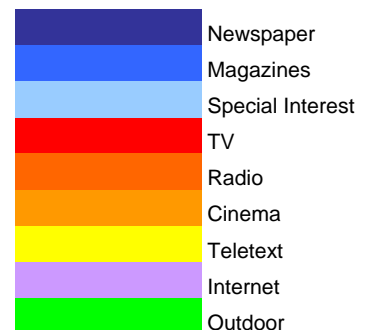
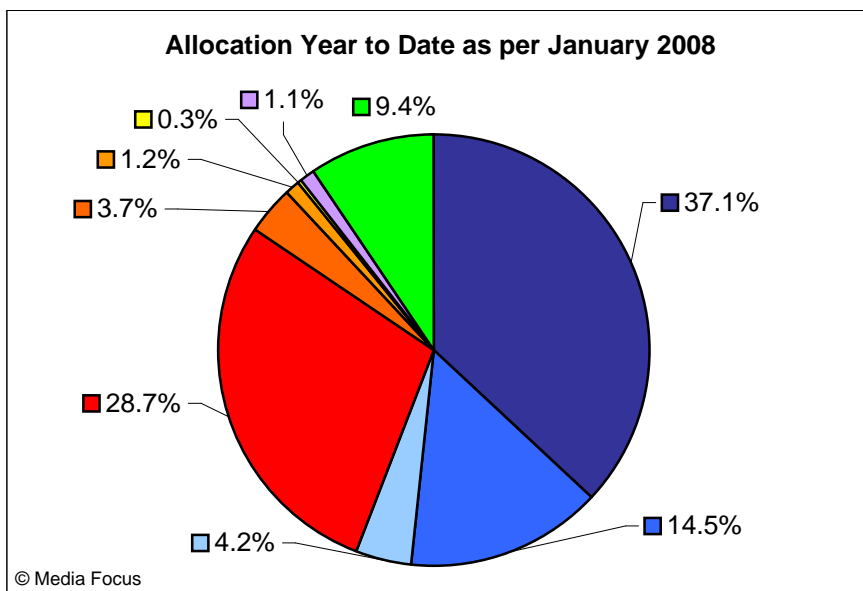
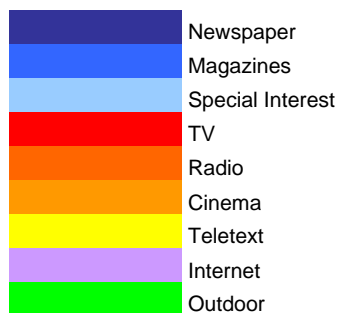
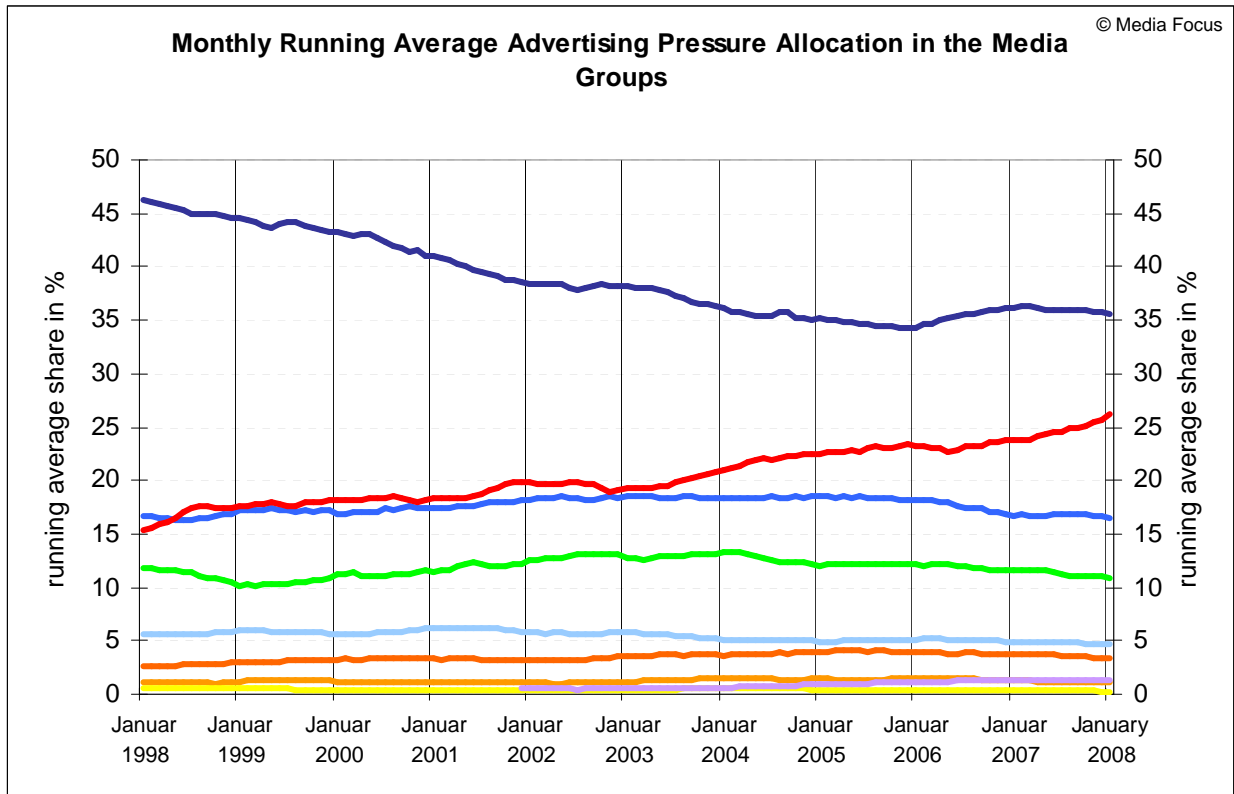


Chart: Allocation of Advertising Pressure per Media Group Year to Date



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

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



Development of Advertising Pressure per Key Market

Chart: Actual Status versus Previous Year versus cumulative January 2008

Pos.	Key Market	January 2008		2008 cumulative	
		TCHF	+/- PY %	TCHF	+/- PY %
All Key Markets		279'370	10.1	279'370	10.1
1	Clothes, Sports, Leisure	4'689	-7.1	4'689	-7.1
2	Services	20'905	28.2	20'905	28.2
3	Energy	1'319	-2.7	1'319	-2.7
4	Automotive	30'918	16.6	30'918	16.6
5	Finance / Insurances	26'540	-2.3	26'540	-2.3
6	Public Benefits	7'626	5.5	7'626	5.5
7	Beverages	8'592	35.6	8'592	35.6
8	Household Devices	6'605	-24.1	6'605	-24.1
9	IT	3'892	-7.9	3'892	-7.9
10	Cosmetics / Body Care	13'191	1.6	13'191	1.6
11	Furniture, House / Garden	12'573	7.8	12'573	7.8
12	Food	25'173	53.7	25'173	53.7
13	Pharma / Health	9'108	20.7	9'108	20.7
14	Political Campaigns	2'441	67.8	2'441	67.8
15	Tobacco	441	-55.7	441	-55.7
16	Telecommunications	15'020	-18.7	15'020	-18.7
17	Tourism, Transport	21'647	20.3	21'647	20.3
18	Entertainment Dev. Photo	13'519	57.6	13'519	57.6
19	Watches Jewellery	2'334	75.1	2'334	75.1
20	Other smaller Markets	17'817	12.5	17'817	12.5
21	Assortment Advertising*	26'293	-10.3	26'293	-10.3
22	Image Advertising*	8'728	5.2	8'728	5.2

* those not being allocated to a certain market

TOP Companies generating Advertising Pressure January 2008

Chart: Top 30 and share of total market

Rang	Retailer
1	MIGROS
2	COOP
3	NESTLE
4	SWISSCOM
5	L'OREAL
6	MEDIA MARKT
7	PROCTER & GAMBLE
8	UNILEVER
9	FUST
10	RECKITT-BENCKISER
11	AUDI
12	KUONI
13	ORANGE COMMUNICATIONS
14	FIAT
15	OPEL
16	ALDI SUISSE
17	IKEA
18	BMW
19	MIGROSBANK
20	RENAULT
21	DANONE
22	ASCOT ELITE ENTERTAINMENT
23	VW
24	TOYOTA
25	SUNRISE COMMUNICATIONS
26	BEIERSDORF
27	MC DONALD'S
28	TIT-PIT
29	FOX WARNER
30	DIE POST



CHF 103.6 millions
= 37.1 % of the Total Market

³ 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.

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