

# Media Focus Ad Market Trend Report 2008/06

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**Monthly report on Swiss advertising market**

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## 1. Data month June 2008: Highlights

Cautious advertising month June: Compared to the level in the previous year, the advertising pressure decreased by 8% on a total of 305 million CHF. The cumulative mid-year result for 2008 ends with a plus of 6.6%.

Not affected by the negative trend was the key market **„Automotive“**, which gathered a plus of 26.3% (23.1 million CHF) compared to the previous period. The little ones make it big. The strongest growth compared to the previous period was analyzed in the Segment *PKW (new) Compact* with a plus of +113% (+2.95 million CHF) and in *PKW (new) Mini* +369% (+1.13 million CHF). Least support was seen for the Segment *PKW (new) Vans/Minivans* with a decline of 850'000 CHF (-39.1%). The European Football Championship sponsors Hyundai/Kia made it with only one product into Top 5 within the different segments of the product group *PKW (new)*.

Constantly on top position according to the growth of advertising pressure in 2008 is the key market **„Consumer Electronics/ Photo/ Video“**. With a plus of 50.8% compared to the first semester in the previous year, the sector **„Watches/ Jewelry“** (+23.3%), ranked second, is kept on distance. The biggest growths within the top positioned key market result from the product segments *Movies* (+8.0 million CHF), *CD's (recorded)* (+7.1 million CHF) and *Single Lens Reflex (SLR) Cameras digital* (+4.9 million CHF) in comparison to the first semester 2007.

While analyzing the total per media group in the first semester of 2008, **„Internet“** increased by 27.6% (partly affected by the new data delivery concept), followed by **„TV“** (+18.7%) and **„Cinema“** (+13.4%).

The key market **„Household Devices“** had a positive monthly result of 18.4% compared to the previous period while the range *Cleaning* (+33.3%, +1.9 million CHF) showed the strongest growth. The product segments *Multi Purpose Cleaner* and *Detergent Others* with a cumulated plus of 1.6 million CHF made this mirror finish result possible.

Positively results were also seen for the advertising market **„Tobacco“ (+37.6%)**, **„Cosmetics/ Body Care“ (+10.9%)** and the overall **„Assortment Advertising“ (+18.7%)** compared to June 2007.

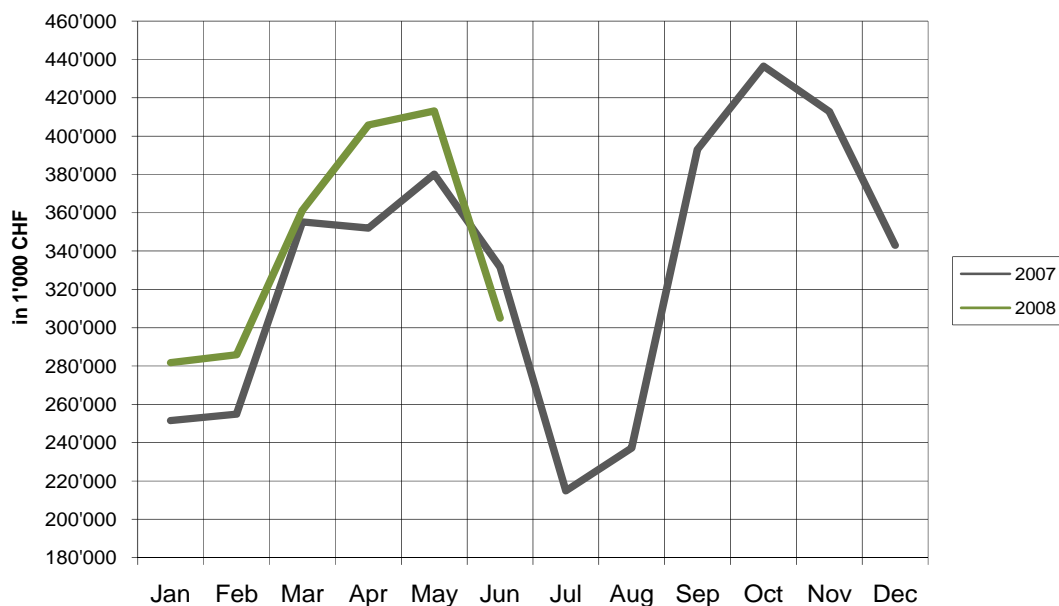
## 2. Evolution advertising pressure total market

Chart: Advertising pressure trend 2008 (update June)

	2007	2008	
month	TCHF	TCHF	+/- %
January	251'474	281'768	12.0%
February	254'923	285'907	12.2%
March	355'235	361'286	1.7%
April	351'985	405'804	15.3%
May	380'127	413'138	8.7%
June	331'555	304'996	-8.0%
July	214'862	0	
August	237'153	0	
September	393'023	0	
October	436'530	0	
November	412'858	0	
December	342'983	0	
year to date	1'925'298	2'052'899	6.6%

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 June)

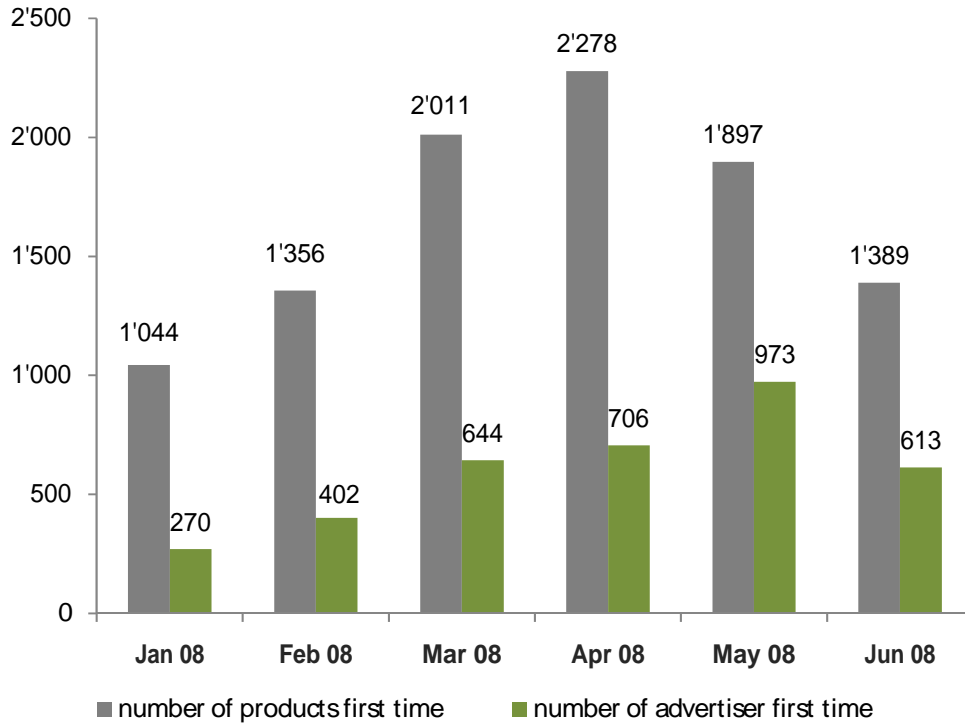


### 3. Evolution advertising pressure per key market

Position	Key Market	June 2008		2008 cumulative	
		TCHF	+/- PY %	TCHF	+/- PY %
	<b>All key markets</b>	<b>304'996</b>	<b>-8.0</b>	<b>2'052'899</b>	<b>6.6</b>
1	Clothes / Sports / Leisure	5'654	-11.0	65'682	-9.6
2	Services	15'500	-10.0	106'372	10.9
3	Energy	2'337	-18.5	12'830	-18.7
4	Automotive	35'512	26.3	233'158	7.4
5	Finance / Insurances	22'320	-41.2	171'300	-10.2
6	Public Benefits	6'260	-12.1	44'088	7.5
7	Beverages	9'104	-56.0	70'026	0.5
8	Household Devices	10'910	18.4	67'955	3.3
9	IT	2'873	-36.1	23'892	-27.0
10	Cosmetics / Body Care	24'042	10.9	137'394	12.3
11	Furniture / House / Garden	12'669	-0.8	94'075	-2.7
12	Food	23'696	-28.8	188'496	8.8
13	Pharma / Health	8'238	-18.4	58'172	6.2
14	Political Campaigns	2'086	-48.2	27'146	14.8
15	Tobacco	1'437	37.6	6'962	-16.9
16	Telecommunications	20'838	-10.0	121'388	8.2
17	Tourism / Transport	17'476	-4.4	120'549	12.7
18	Entertainment Dev. / Photo / Movies	15'911	22.7	98'893	50.8
19	Watches / Jewelry	4'854	0.2	31'514	23.3
20	Other smaller markets	23'129	10.0	130'896	9.5
21	Assortment Advertising*	25'405	18.7	155'921	11.2
22	Image Advertising*	14'743	13.8	86'192	15.1

\* not being allocated to a certain market

#### 4. New advertiser and products year to date



#### 5. TOP 10

##### Top 10 advertiser (June 2008)

position	advertiser*
1	MIGROS
2	COOP
3	L'ORÉAL
4	SWISSCOM
5	ORANGE
6	PROCTER & GAMBLE
7	RECKITT-BENCKISER
8	NESTLE
9	MEDIA MARKT
10	MERCEDES

\* product-, assortment- and image-advertising

##### Top 10 products (June 2008)

position	products*
1	ORANGE OPTIMA
2	TELE2 MOBILE TARIFE
3	PEUGEOT 308 SW PKW
4	SEAT IBIZA PKW
5	LG KF 750 SECRET HANDY
6	SUZUKI SWIFT PKW
7	NOKIA N77 HANDY
8	SUNRISE MOBILE ZERO TARIF
9	SMART FORTWO PKW
10	BLUEWIN MOBILE TV

\* 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 June 2008

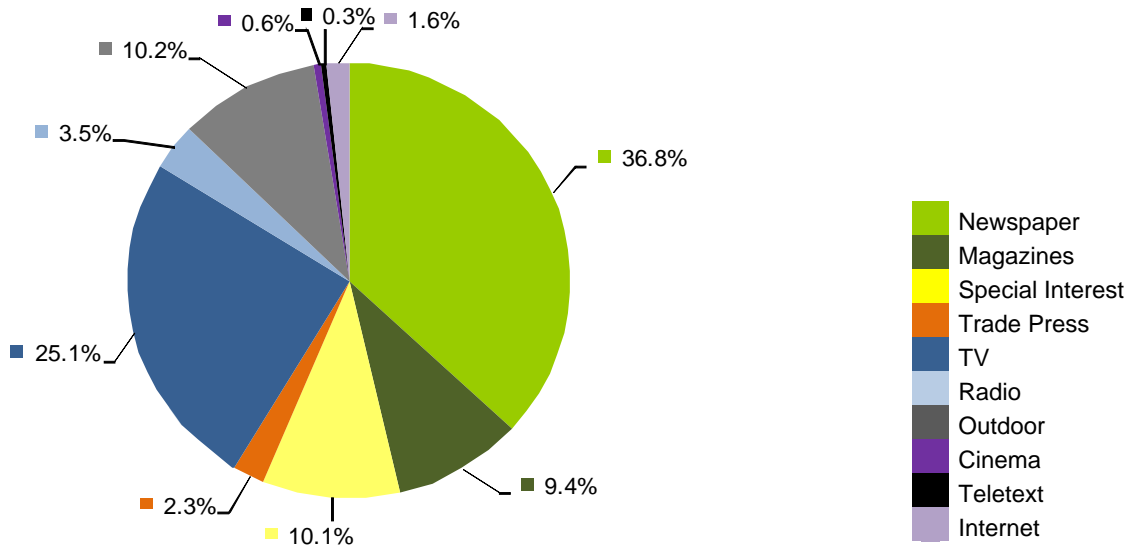


Chart: Allocation of advertising pressure per media group Year to Date as per June 2008

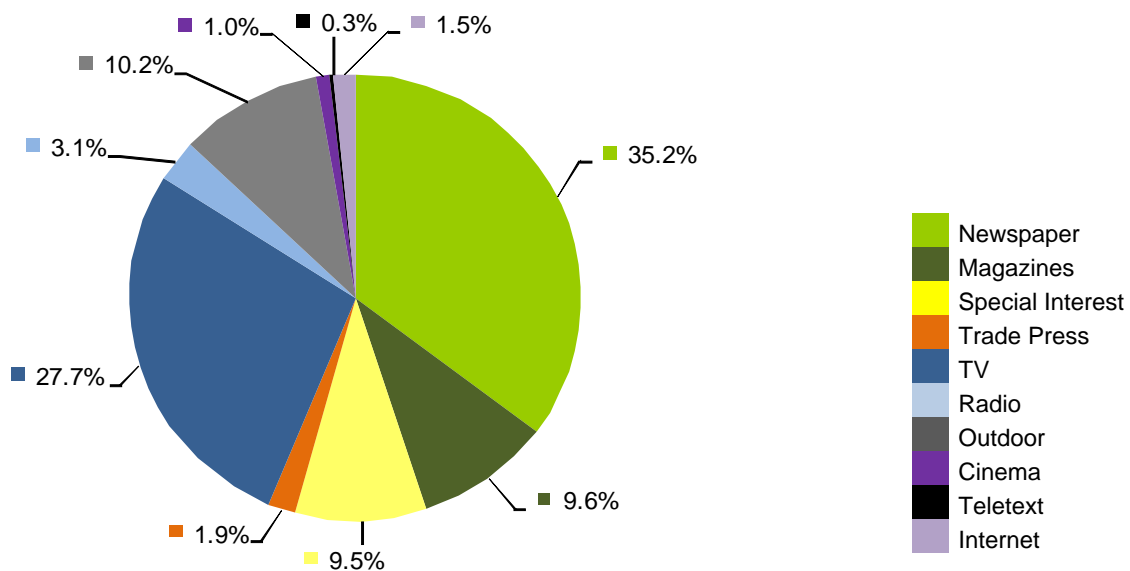
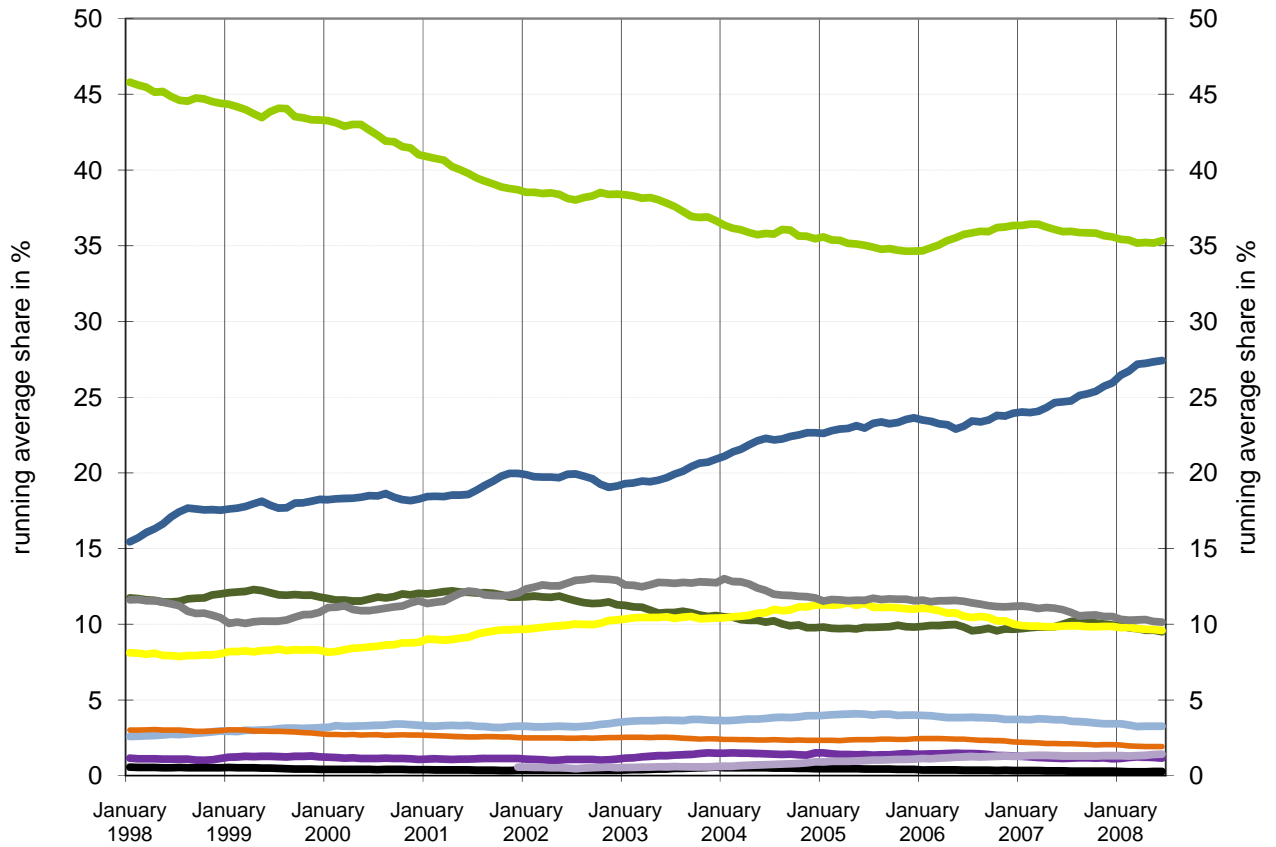


Chart: Monthly running average advertising pressure allocation in the media groups



- Newspaper
- Magazines
- Special Interest
- Trade Press
- TV
- Radio
- Outdoor
- Cinema
- Teletext
- Internet

## 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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