

Media Focus

Ad Market Trend

Report 2008/03

Monthly report on Swiss advertising market

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1. Data month March 2008: Highlights

The advertising month March was very intensive and grew again slightly compared to the same period in 2007 with a plus of 1.1% (+367'244 TCHF). The cumulated plus for January to March 2008 is 7.7%.

The sector „**Consumer Electronics / Photo / Movies**“ is a market with very high growth for March 2008 with an increase of 44.3% (+15.9 million CHF) compared to the same period in 2007. A glance at this sector shows, that *Photo* (+303 %, 4.5 million CHF), *Audio-Visual devices* (+44.5%, 3.5 million CHF) and *Movie + Pay-TV* (+17.9%, 3.7 million CHF) are the strongest growing product groups in this period. This leads to the fact, that a digital reflex camera is found among the TOP 10 advertised products in this month.

Another positive trend was seen in the key market **“Watches and Jewelry”**. Towards the spring kick-off the gross advertising pressure increased with 31.6% to a total of 5.04 million CHF for March 2008. The most positive trend within this sector was found in the product group *Watches* with a plus of 72.6% (1.6 million CHF), which was driven by one jeweller.

“Beverages” as a key market grew with 29.6% (12.1 million CHF) compared to the same period in the year before. “Coca Cola Zero”, to keep once well formed summer body, was the strongest advertised product within the product segment *Alcohol free beverages*, followed by “Henniez Mineralwasser” and “Lipton Ice Tea”.

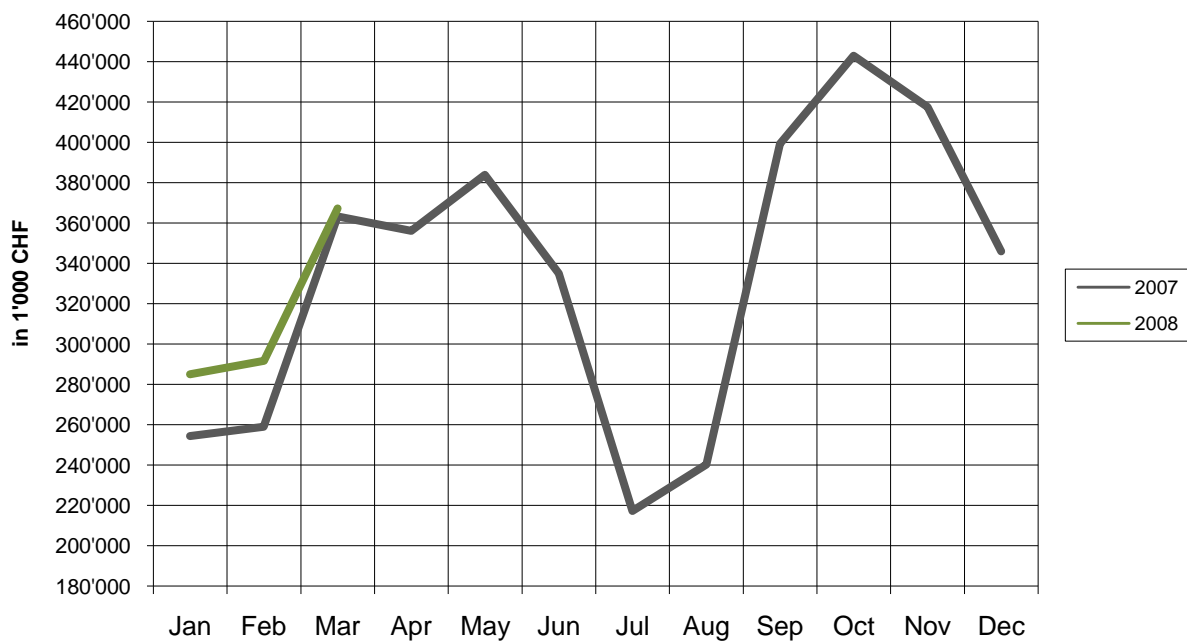
The advertising markets **“Cosmetics / Body Care (+20.3%)”**, **“Food (+20.3%)”** and **“Telecommunication (+12.1%)”** all increased significantly compared to the same period in the previous year.

2. Evolution advertising pressure total market

Chart: Advertising pressure trend 2008 (update March)

month	2007	2008	+/- %
	TCHF	TCHF	
January	254'323	285'050	12.1%
February	258'960	291'640	12.6%
March	363'197	367'244	1.1%
April	356'137	0	
May	383'877	0	
June	334'994	0	
July	217'203	0	
August	240'240	0	
September	399'238	0	
October	442'869	0	
November	417'524	0	
December	345'850	0	
year to date	876'479	943'933	7.7%

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



3. Evolution advertising pressure per key market

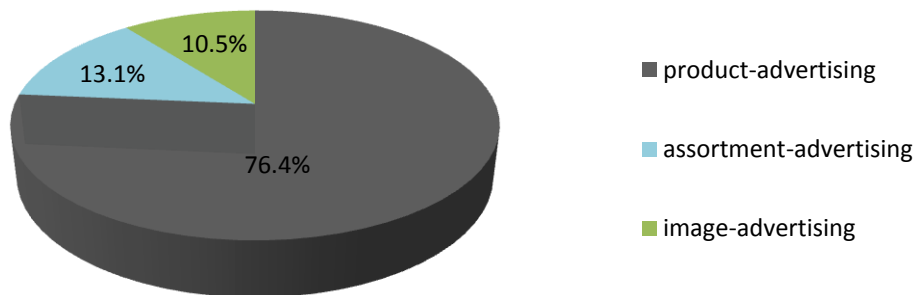
Position	Key Market	March 2008		2008 cumulative	
		TCHF	+/- PY %	TCHF	+/- PY %
	All key markets	367'244	1.1	943'933	7.7
1	Clothes / Sports / Leisure	18'381	-15.1	27'454	-13.3
2	Services	24'568	0.9	68'679	19.4
3	Energy	2'306	-31.2	5'204	-15.7
4	Automotive	40'113	-17.6	107'076	-1.6
5	Finance / Insurances	32'394	4.8	84'780	1.0
6	Public Benefits	7'763	-7.5	22'331	7.7
7	Beverages	12'107	29.6	29'748	33.4
8	Household Devices	11'970	-2.8	26'353	-10.5
9	IT	4'988	-6.7	13'104	-21.1
10	Cosmetics / Body Care	22'701	20.3	54'201	17.2
11	Furniture / House / Garden	18'994	-1.7	43'901	0.9
12	Food	35'045	19.8	88'025	34.2
13	Pharma / Health	6'805	-7.3	22'750	0.1
14	Political Campaigns	2'325	-64.7	9'146	-22.8
15	Tobacco	980	-57.1	1'905	-53.4
16	Telecommunications	22'815	12.1	57'657	7.6
17	Tourism / Transport	20'009	-2.7	60'631	10.0
18	Entertainment Dev. / Photo / Movies	15'894	44.3	44'691	54.0
19	Watches / Jewelry	5'044	31.6	9'759	39.7
20	Other smaller markets	22'259	-5.9	59'819	9.3
21	Assortment Advertising*	25'032	8.1	72'800	0.2
22	Image Advertising*	14'750	16.8	33'916	2.2

* not being allocated to a certain market

4. Special reporting

Product-, assortment- or image-advertising

Type of advertising (update March):



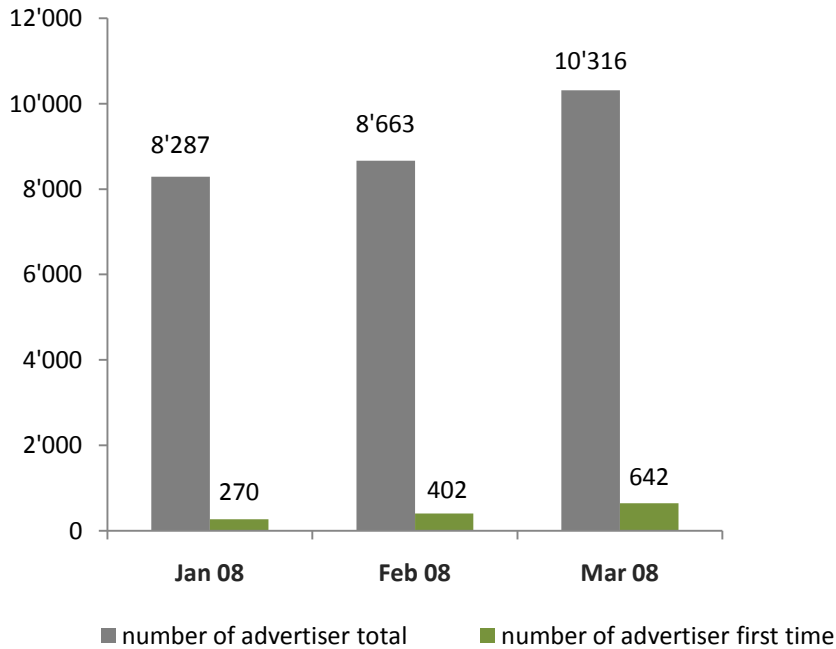
product-advertising: advertisement / spot with one up to five products being advertised

assortment-advertising: advertisement / spot with more than five products being advertised

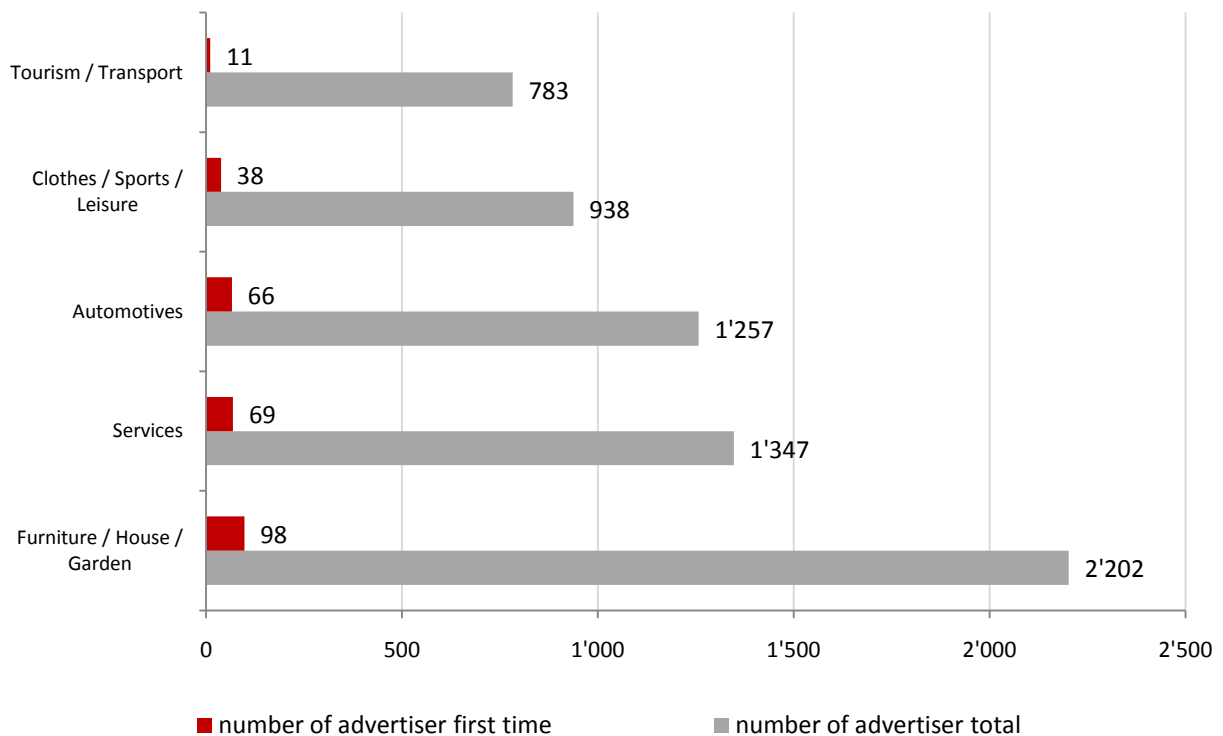
image-advertising: advertisement / spot with no products illustrated or mentioned

5. Advertisers year to date

Changes number of advertiser YTD

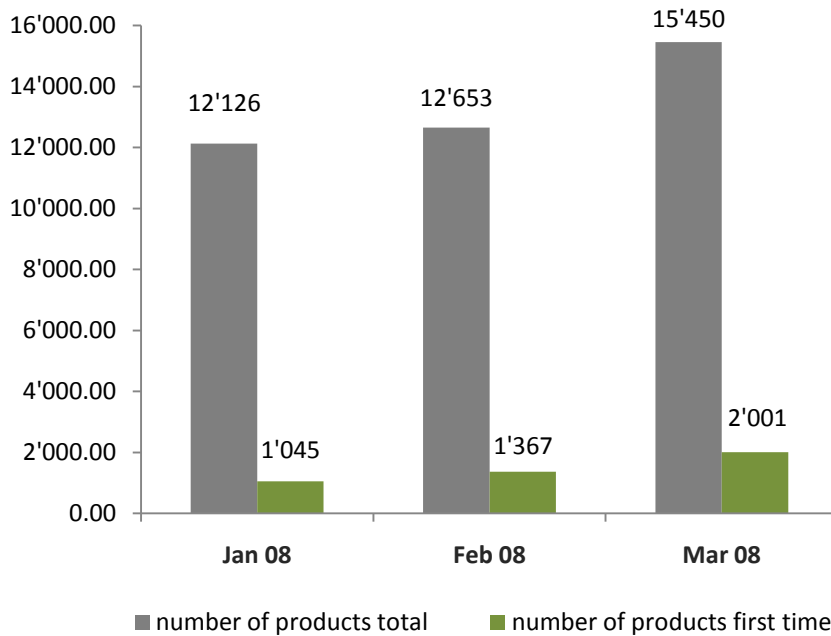


Greatest number of advertiser in march 2008 (Top 5 key markets)



6. Products year to date

Evolution number of products being advertised YTD (update March)



7. TOP 10

Top 10 advertiser (March 2008)

position	advertiser*
1	MIGROS
2	COOP
3	L'ORÉAL
4	SWISSCOM
5	NESTLE
6	UNILEVER
7	MANOR
8	MARS
9	AXA WINTERTHUR
10	MC DONALD'S

* product-, assortment- and image-advertising

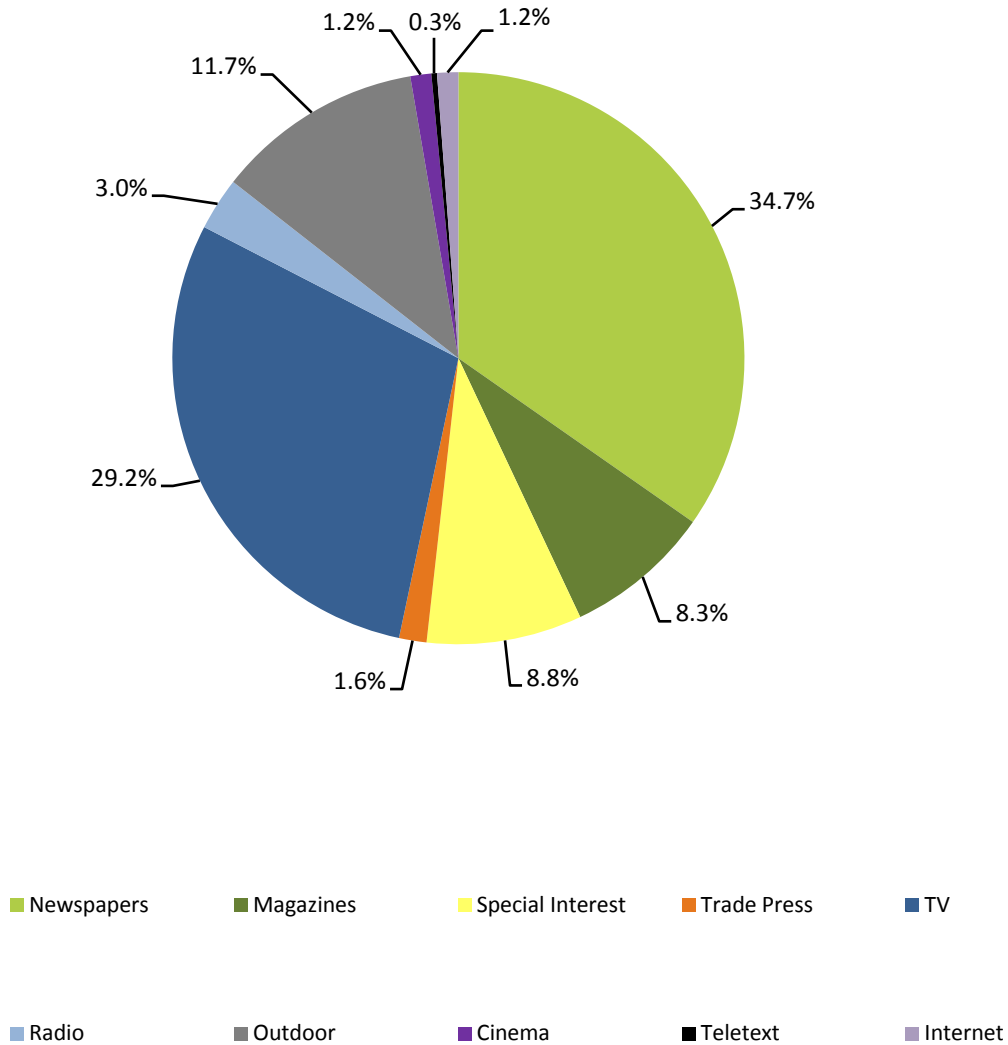
Top 10 products (March 2008)

position	products*
1	SONY ALPHA 350
2	WWW.CREDIT-NOW.CH
3	SUNRISE MOBILE FESTNETZ ABO
4	FORD FOCUS FIFTY CARVING PKW
5	AXA WINTERTHUR FAHRZEUGVERSICHERUNG
6	COCA COLA ZERO
7	BMW 1ER CABRIO
8	WWW.SWISSCOM.CH
9	TELE2 MOBILE TARIFE
10	ORANGE OPTIMA

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

8. Allocation of advertising pressure per media group

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



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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