

Media Focus Ad Market Trend Report 2008/11

Monthly report on Swiss advertising market

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1. Data month November 2008: Highlights

La crise n'existe pas? Compared to November 2007 the advertising pressure increased by 2.0%. The cumulative plus for 2008 is 3.1%. After this result it can be taken for sure that the complete advertising year 2008 will close with a positive trend.

The economic crisis doesn't affect the advertising market as hard as assumed. Except **TV** (-3.7%), **Radio** (-2.3%) and **Special Press** (-6.8%), all Media Groups could increase compared to November 2007. Actually the winners and looser in the advertising market keep the balance. Obviously the market is volatile in general and advertising spending is switching between media groups or media vehicles. Not affected at all of any crisis is the display advertising in the media group **Internet** (+42.3%), which increased significantly due to strategic shifts within the companies.

Sunday Press increased by +14.9% as there was an additional Sunday compared to the same period in 2007. Nevertheless **Image advertising** lost 21.9% compared to November 2007.

The key market „**Food**“ increased the advertising pressure in November 2008 by 18.4% (+5.9 million CHF). A huge slice goes to the product group “*Dietary- & Energyfood*”. This product group was driven by a product out of the Rivella group and closed with a plus of 2.2 million CHF. Coop increased its Image advertising for their premium product extension “*Fine Food*” which lifts the result for the product group *Food Image, Internet & Product assortment* to a plus of 54.4% or 2.2 million CHF.

„**Political Campaigns**“ increased due to the public voting in November by +273.9%. The most advertised subject was the “*AHV-Initiative*”.

The advertising markets „**Household**“ (+25.5%) and „**Tobacco**“ (+17.1%) also closed with a positive result compared to the previous period in 2007.

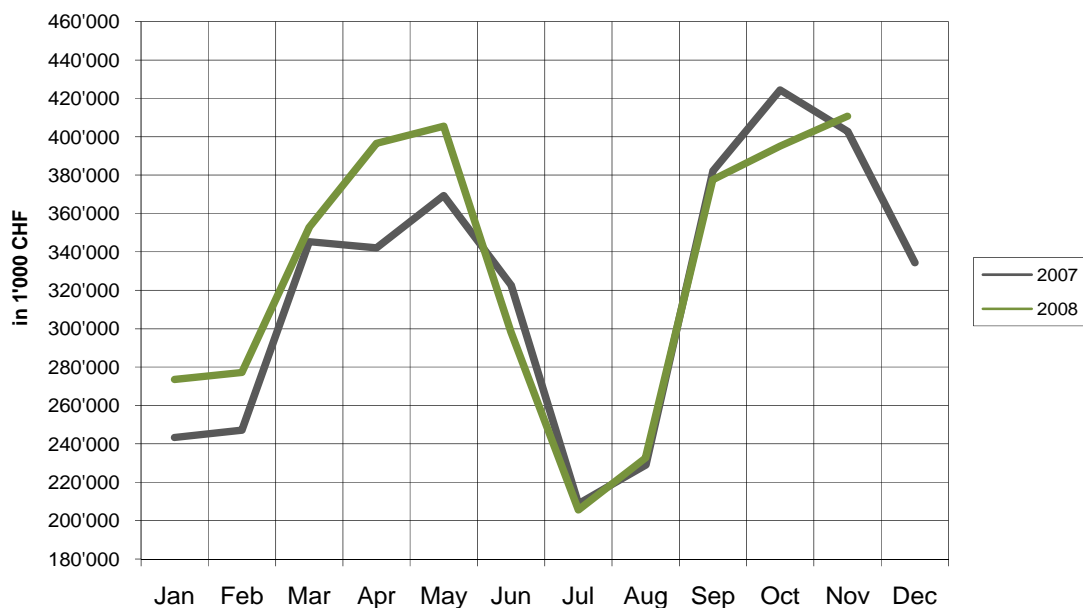
2. Evolution advertising pressure total market

Chart: Advertising pressure trend 2008 (update November)

Month	2007	2008	+/- %
	TCHF	TCHF	
January	243'303	273'547	12.4%
February	247'119	277'236	12.2%
March	345'331	352'829	2.2%
April	342'170	396'501	15.9%
May	369'299	405'467	9.8%
June	322'634	298'347	-7.5%
July	208'715	205'610	-1.5%
August	228'959	232'729	1.6%
September	382'249	377'577	-1.2%
October	424'432	395'138	-6.9%
November	402'787	410'666	2.0%
December	334'313	0	
year to date	3'516'998	3'625'647	3.1%

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 November)

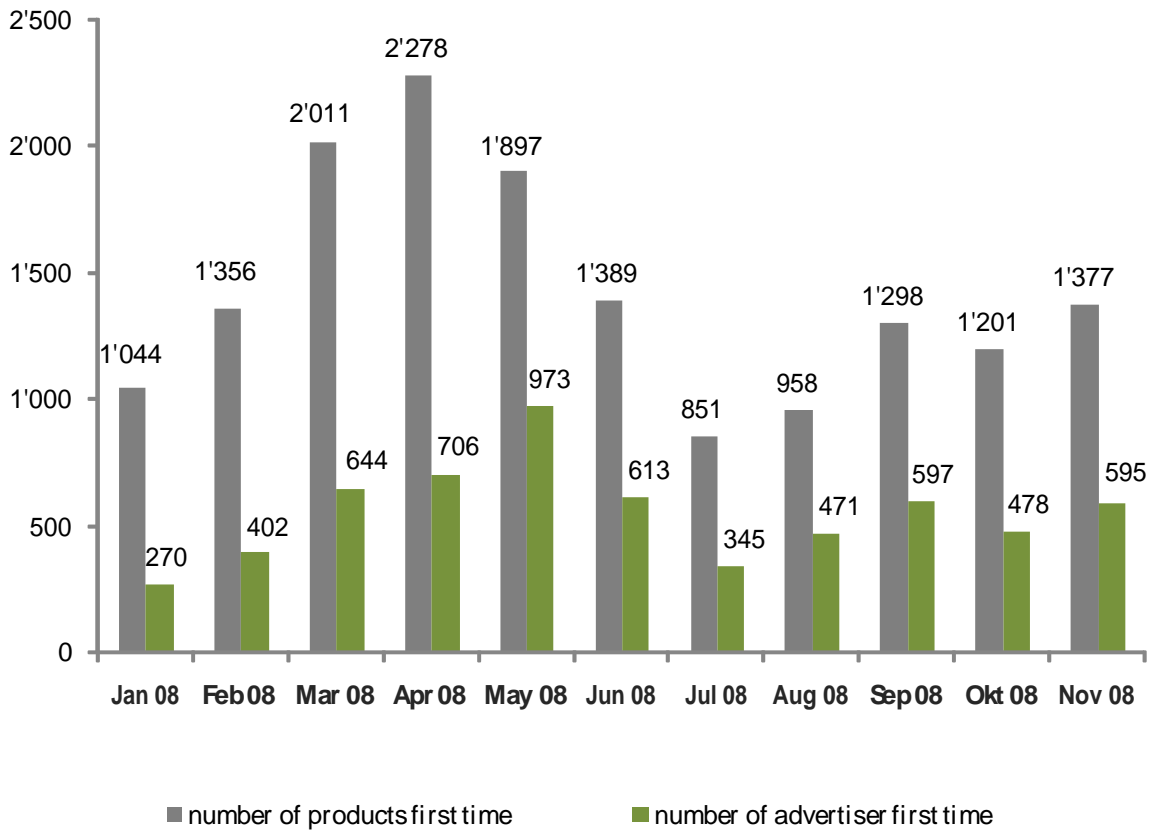


3. Evolution advertising pressure per key market

Position	Key Market	November 2008		2008 cumulative	
		TCHF	+/- PY %	TCHF	+/- PY %
	All key markets	410'666	2.0	3'625'647	3.1
1	Clothes / Sports / Leisure	13'704	-0.3	122'723	-3.5
2	Services	16'376	10.2	182'860	10.9
3	Energy	2'446	-4.8	23'627	-9.4
4	Automotive	32'055	-1.5	373'377	3.7
5	Finance / Insurances	39'113	-11.9	338'666	-8.9
6	Public Benefits	8'700	2.0	81'922	6.7
7	Beverages	13'047	-0.1	130'197	2.2
8	Household Devices	18'098	25.5	127'895	3.3
9	IT	4'316	-5.1	41'205	-19.5
10	Cosmetics / Body Care	30'334	14.2	257'663	12.8
11	Furniture / House / Garden	17'935	-11.4	162'002	-3.8
12	Food	37'899	18.4	335'430	5.9
13	Pharma / Health	11'659	16.9	99'757	8.9
14	Political Campaigns	13'923	273.9	56'908	-8.4
15	Tobacco	2'479	17.1	14'037	3.5
16	Telecommunications	24'622	-15.4	199'433	-4.3
17	Tourism / Transport	20'565	-7.4	206'933	8.5
18	Entertainment Dev./ Photo/ Motion Pictures	18'048	-16.3	153'750	19.1
19	Watches / Jewelry	15'237	-4.7	65'469	12.4
20	Other smaller markets	33'624	13.4	251'685	4.8
21	Assortment Advertising*	23'896	-4.0	256'517	7.7
22	Image Advertising*	12'591	-21.9	143'591	1.1

* 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	UNILEVER
7	ORANGE
8	SWISSCOM
9	SUNRISE COMMUNICATIONS
10	RENAULT

* product-, assortment- and image-advertising

Top 10 products

position	products*
1	ORANGE OPTIMA
2	AXA WINTERTHUR VORSORGE SAEULE 3A
3	HENNES + MAURITZ DAMENKLEIDUNG
4	MICHEL POWER COFFEE BERRY ENERGY DRINK
5	NESPRESSO ESPRESSO-KAFFEE
6	SUNRISE MOBILE ZERO PLUS TARIFE
7	RENAULT MEGANE PKW
8	DELIZIO COMPACT KAFFEETEEMASCHINE
9	RENAULT KOLEOS SUV
10	NIKON D90

* 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 November 2008

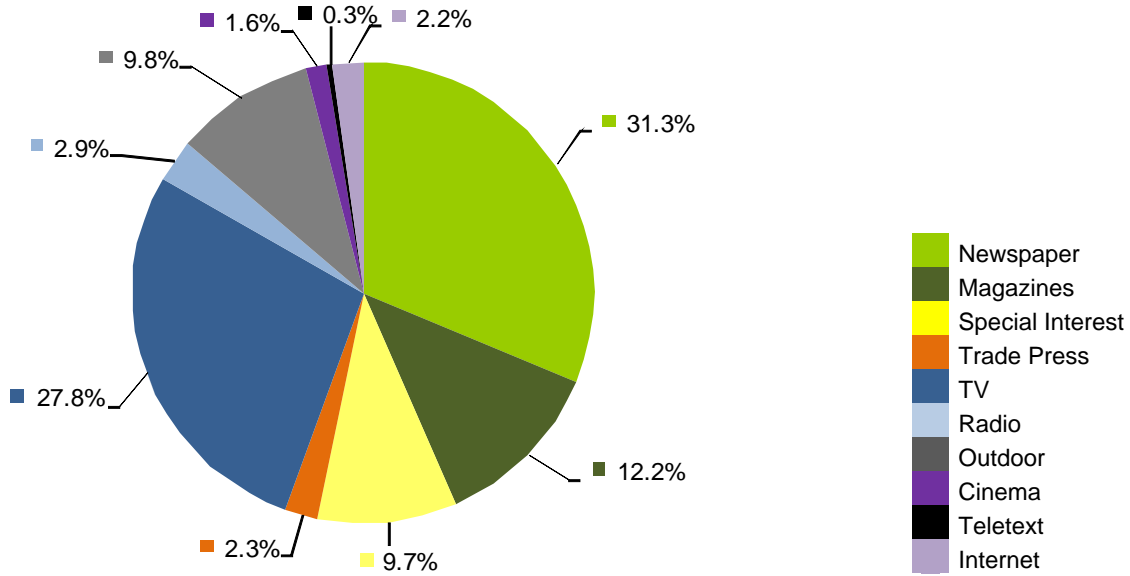


Chart: Allocation of advertising pressure per media group Year to Date as per November 2008

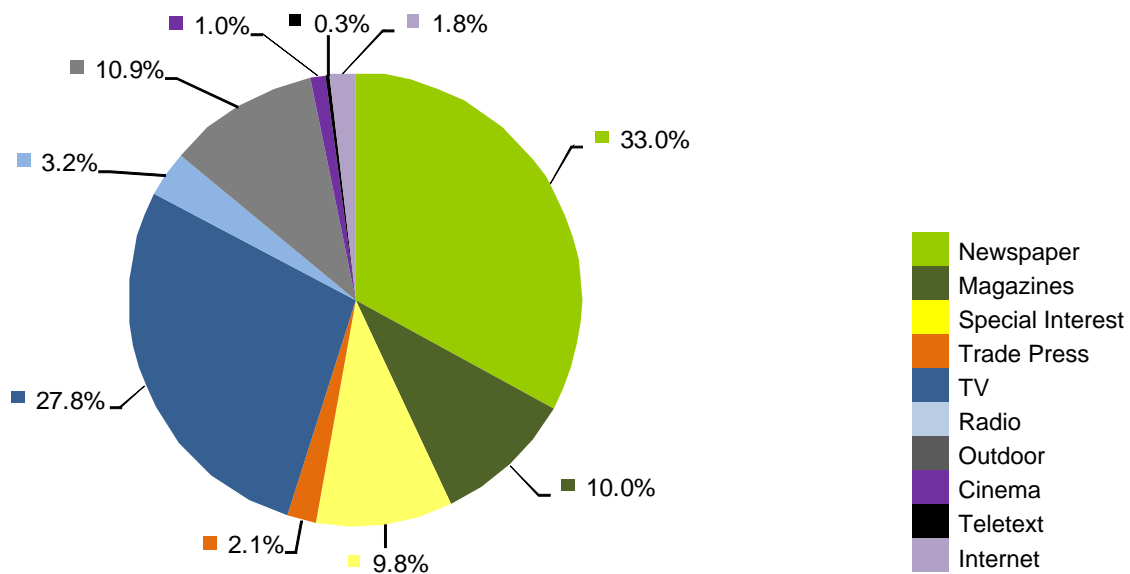
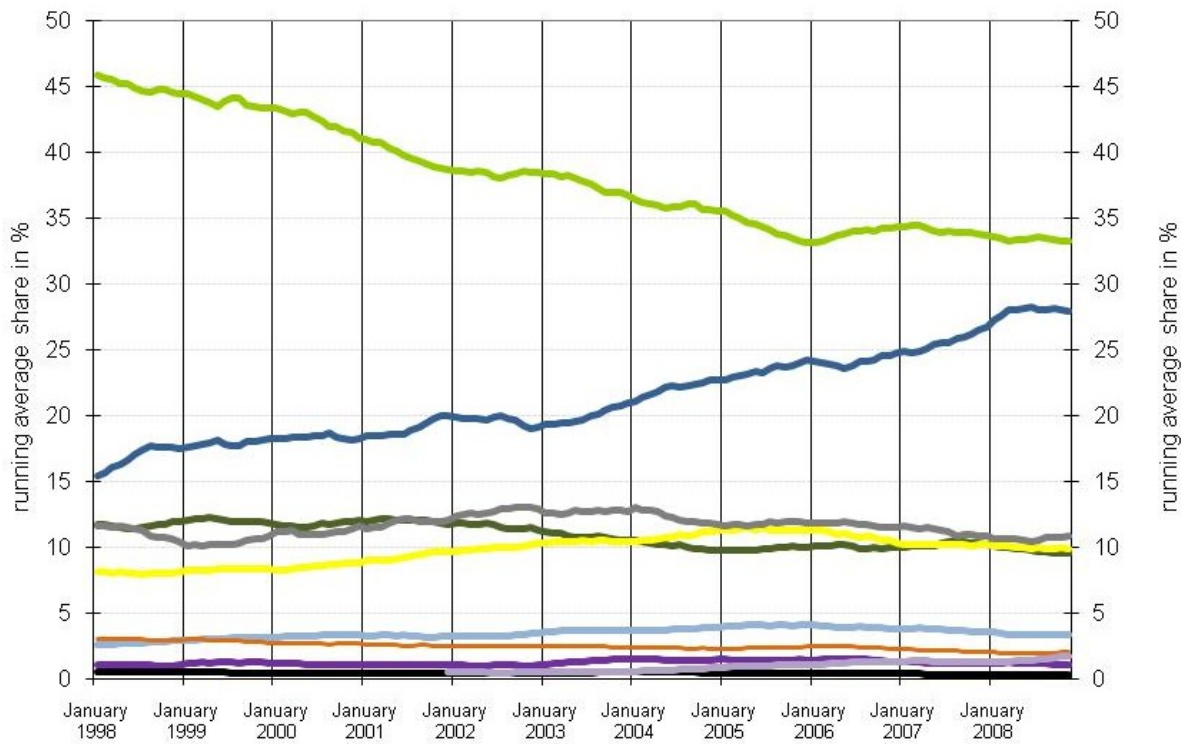


Chart: Monthly running average advertising pressure allocation in the media groups



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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