

# Media Focus Ad Market Trend Report 2008/10

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**Monthly report on Swiss advertising market**

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## 1. Data month October 2008: Highlights

When comparing 2007 and 2008, it will come to a head to head final. The advertising month October finishes with a minus of -7.6%. This decrease lowers the cumulative plus for 2008 compared to the previous year from +4.7% to 3.1%.

Despite the negative total market trend for October, the sector **„Energy“** increased by +23.2% compared to the same period in 2007. Highest growth within this sector was seen in the product group *Energy-Image*. Due to the liberalization within the Electricity Market, it seems to have a good Image is worth gold. This fact led to an increase of advertising pressure in this market as a total of 610 TCHF (+60%).

Five out of 19 key markets closed with a minus of more than 20% compared to the previous period. **“Telecommunication”** is one of them, which decreased by -30.5% (-8.6 million CHF). Only Orange increased its advertising pressure compared to October 2007. It is obvious, that the product segment *Mobile* (-43.6%, -8.3 million CHF) is responsible for this significant decrease.

While having a glance at the different media categories, it turns out that they were affected differently. Within the category *“Print”*, the media group **“Finance- and Economic Press”** showed the highest decrease of -14.4%. The weakest performance was seen in the category *“Electronic Media”* by the groups **“Cinema”** (-17.6%) and **“Public TV”** (-15.7%). Not affected by the general negative trend were **“Internet”** (+47.4%) and **“Teletext”** (+28.8%).

The advertising markets **“Tobacco”** (+220.3%) and **“Non profit campaigns”** (+30.0%) closed with a positive trend compared to October 2007.

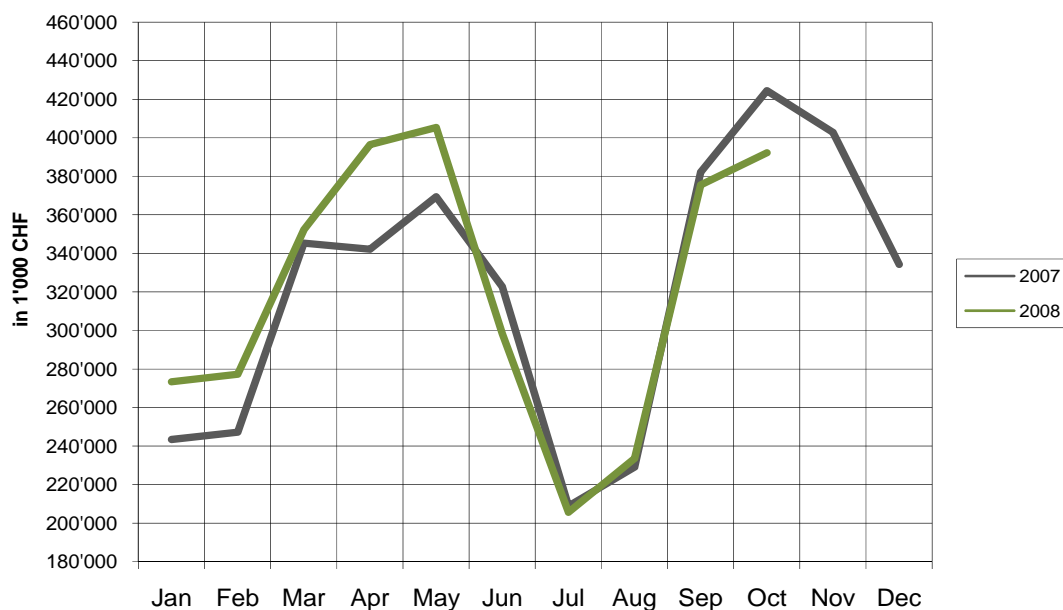
## 2. Evolution advertising pressure total market

Chart: Advertising pressure trend 2008 (update October)

Month	2007	2008	+/- %
	TCHF	TCHF	
January	243'303	273'266	12.3%
February	247'121	277'213	12.2%
March	345'331	352'201	2.0%
April	342'173	396'467	15.9%
May	369'299	405'339	9.8%
June	322'634	298'288	-7.5%
July	208'715	205'516	-1.5%
August	228'964	233'442	2.0%
September	382'249	375'523	-1.8%
October	424'434	392'127	-7.6%
November	402'787	0	
December	334'313	0	
<b>year to date</b>	<b>3'114'222</b>	<b>3'209'383</b>	<b>3.1%</b>

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 October)

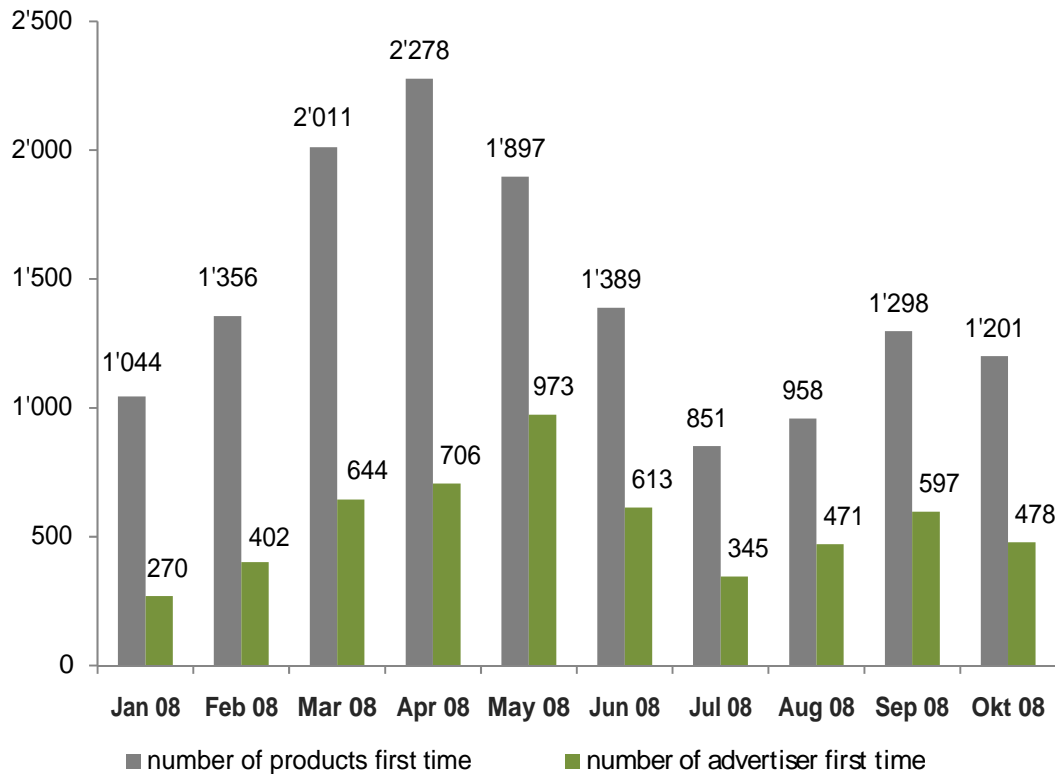


### 3. Evolution advertising pressure per key market

Position	Key Market	October 2008		2008 cumulative	
		TCHF	+/- PY %	TCHF	+/- PY %
	<b>All key markets</b>	<b>392'127</b>	<b>-7.6</b>	<b>3'209'383</b>	<b>3.1</b>
1	Clothes / Sports / Leisure	13'073	-7.3	108'517	-4.3
2	Services	17'993	7.6	165'987	10.6
3	Energy	3'497	23.2	21'184	-9.9
4	Automotive	43'196	-4.9	341'000	4.1
5	Finance / Insurances	45'286	-6.5	299'355	-8.6
6	Public Benefits	9'408	20.2	73'197	7.2
7	Beverages	10'731	-24.8	117'004	2.4
8	Household Devices	13'627	-23.5	109'714	0.2
9	IT	5'050	3.5	36'926	-20.9
10	Cosmetics / Body Care	27'666	6.8	226'956	12.4
11	Furniture / House / Garden	20'484	-4.5	144'005	-2.8
12	Food	38'069	3.9	297'420	4.5
13	Pharma / Health	10'202	9.2	87'444	7.1
14	Political Campaigns	5'215	-69.1	42'767	-26.8
15	Tobacco	1'801	220.3	11'531	0.8
16	Telecommunications	19'475	-30.5	174'613	-2.6
17	Tourism / Transport	19'858	17.9	186'044	10.4
18	Entertainment Dev./ Photo/ Motion Pictures	12'312	-21.6	135'614	26.1
19	Watches / Jewelry	7'509	-8.3	49'861	17.9
20	Other smaller markets	26'663	-11.9	217'473	3.4
21	Assortment Advertising*	22'358	-3.8	231'656	8.6
22	Image Advertising*	18'656	-2.1	131'114	4.0

\* not being allocated to a certain market

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



#### 5. TOP 10 actual month

##### Top 10 advertiser (October 2008)

position	advertiser*
1	MIGROS
2	COOP
3	L'ORÉAL
4	NESTLE
5	PROCTER & GAMBLE
6	SUNRISE COMMUNICATIONS
7	PEUGEOT
8	BEIERSDORF AG
9	SWISSCOM
10	RENAULT

\* product-, assortment- and image-advertising

##### Top 10 products (October 2008)

position	products*
1	RENAULT KOLEOS SUV
2	RIVELLA GELB
3	FORD FIESTA PKW
4	SUBARU FORESTER DIESEL GELAENDEWAGEN
5	SWISS LOTTO
6	PEUGEOT 308 PKW
7	SWISS LIFE VORSORGEVERSICHERUNG
8	RIPOSA MATRATZEN
9	SAMSUNG OMNIA SGH I 900 HANDY
10	EKZ WESTSIDE

\* 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 October 2008

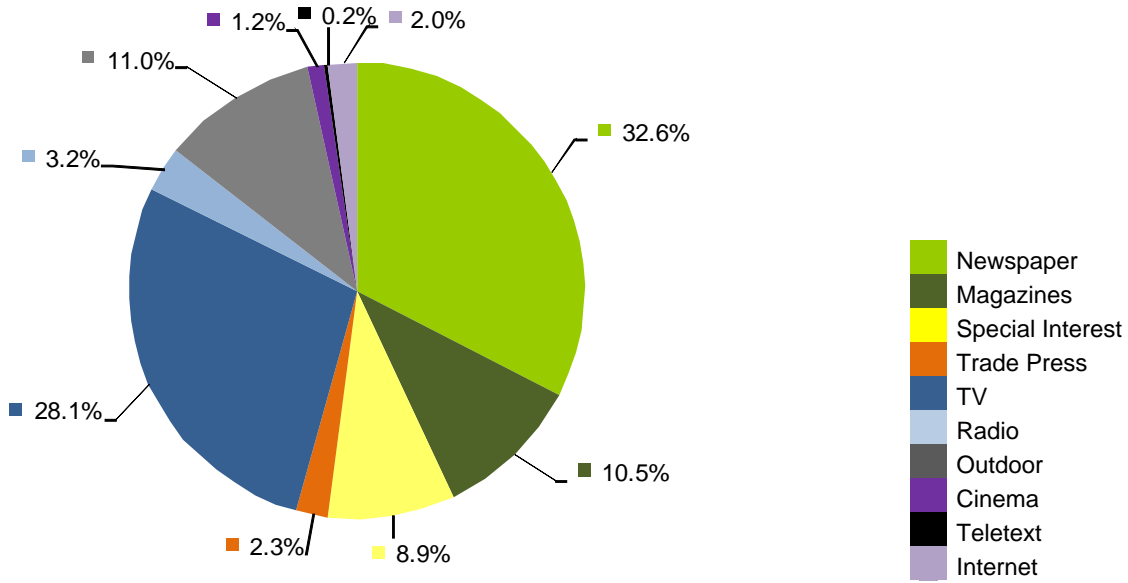


Chart: Allocation of advertising pressure per media group Year to Date as per October 2008

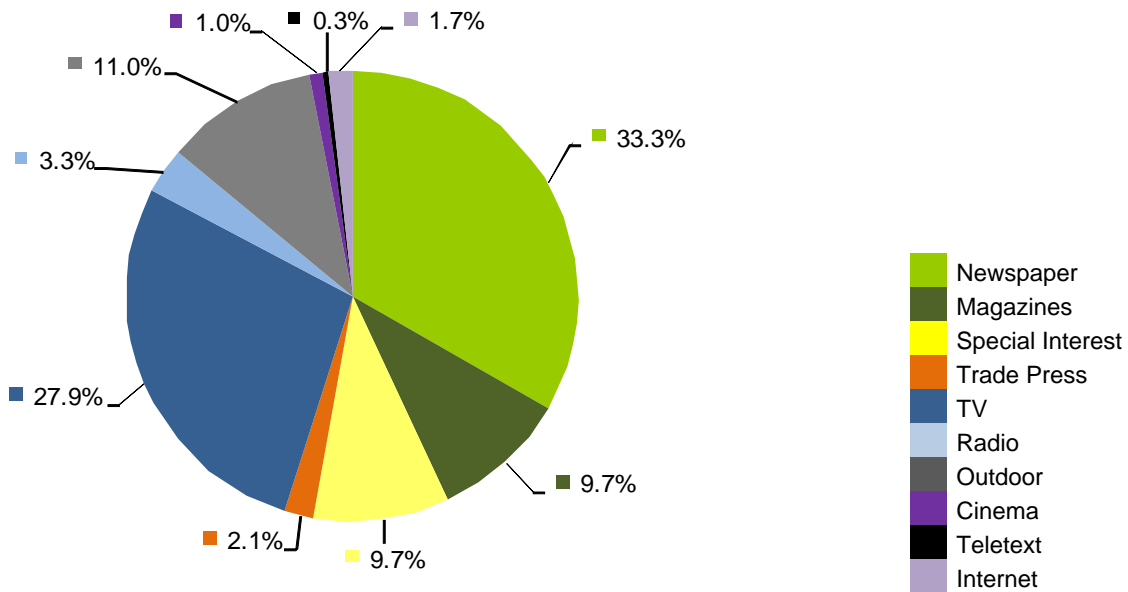
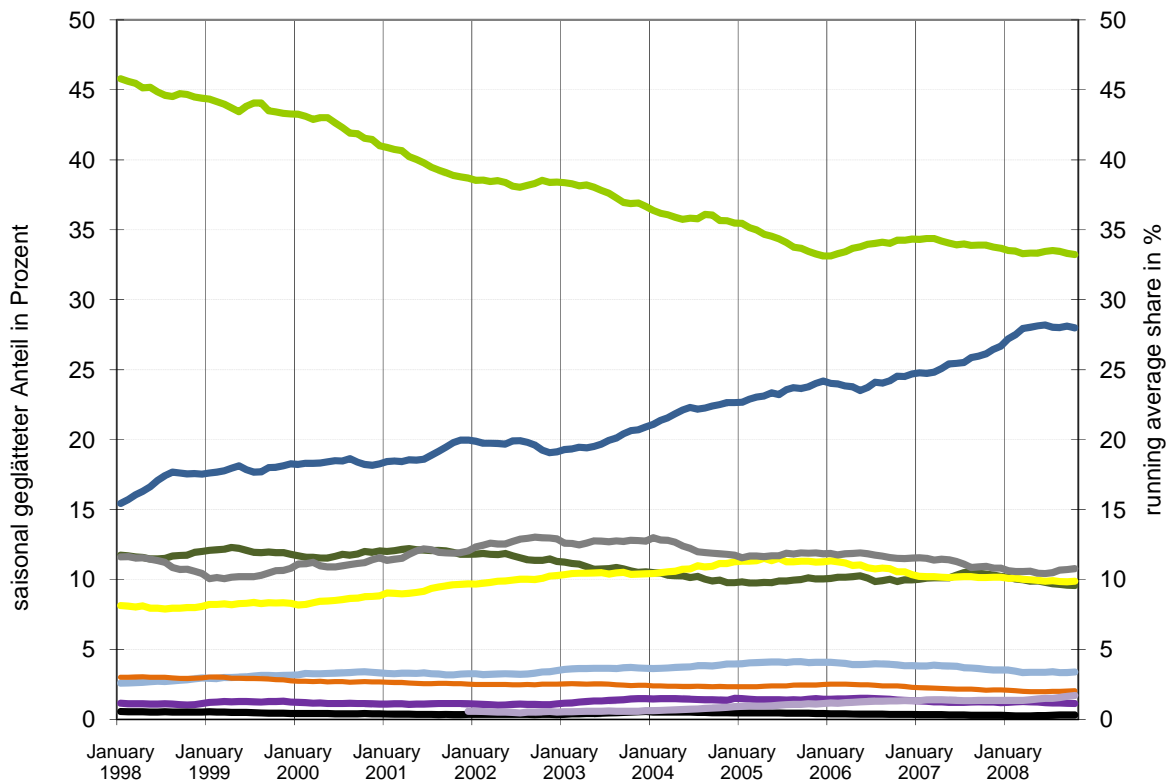


Chart: Monthly running average advertising pressure allocation in the media groups



## 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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