

Media Focus

Ad Market Trend

Report 2009/02

Monthly report on Swiss advertising market

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1. Data month February 2009: Highlights

With a minus of 9.4% the second month of the year also loses advertising pressure compared to the previous year period.

Except Internet, Radio and Trade press every media records a Minus compared to February 2008. The biggest negative trends are seen in the media “cinema theaters” (-44.7%) and “Magazines” (-26.3%). Despite of these negative trends, some sectors performed well in February:

A noticeable plus of 30.6% was performed by the sector „**cosmetics**“. In detail, one can notice that the performance was possible through a strong evolution in the product groups “*Pflegende Gesichtskosmetik*” (+81.4%; +2.2 mill. CHF), „*Pflegende Körperkosmetik*“ (+101.2%; +1.2 mill. CHF), „*Haarstyling*“ (+165.1%; +1.0 mill. CHF) and „*Haarpflege*“ (+76.1%; +0.8 mill. CHF). The evolution in the mentioned product groups was driven by products that have been advertised first time in February. 14 respective 15 new product in the groups „*Pflegende Körperkosmetik*“ and „*Pflegende Gesichtskosmetik*“ demonstrate the dynamics of the sector cosmetics.

Also „**pharma**“ fights successfully against the negative trend and has a growth of 26.3% (+1.9 mill. CHF) compared to previous year. The sector seems to profit from the heavy climate this winter. The growth can be linked to TV advertising for the OTC products. Not less than one million CHF invested the top 10 OTC products on top to February 2008.

The most significant loss of all key markets was recorded by the sector „**IT**“ (-32.1%), followed by „**beverages**“ (-30.9%), „**watches/jewellery**“ (-28.1%) and „**finance**“ (-27.8%). The economic crisis also arrived in the luxury industry.

The markets „**political campaigns**“ (+49.3%) and „**tabacco**“ (+173.4%) also performed well in February 2009.

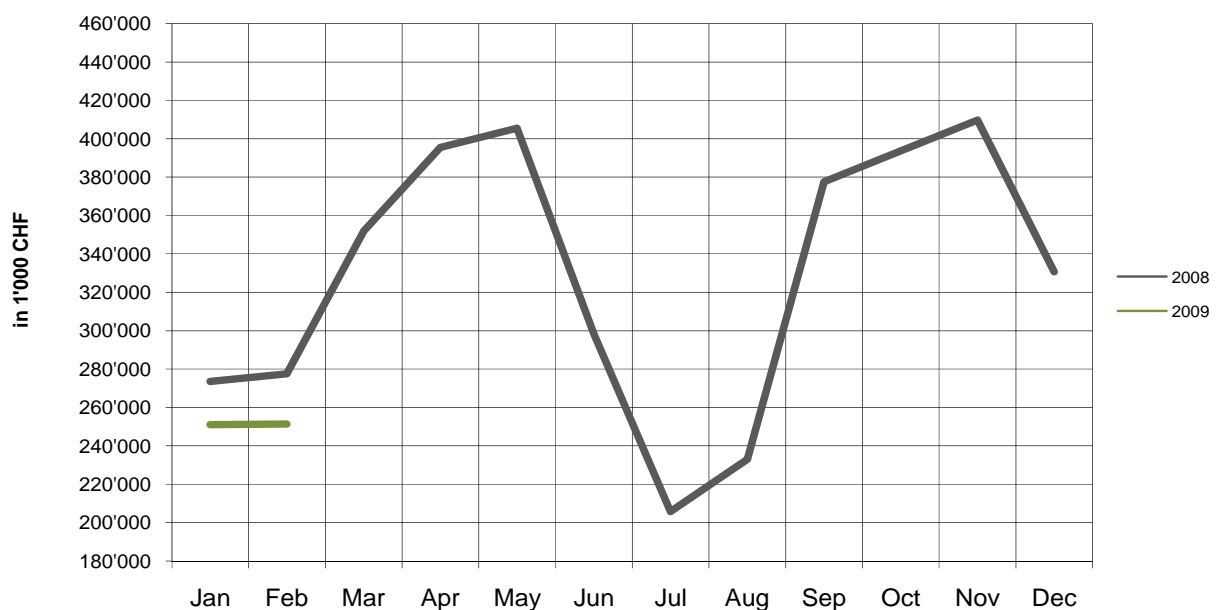
2. Evolution advertising pressure total market

Chart: Advertising pressure trend 2009 (update February)

Month	2008	2009	+/- %
	TCHF	TCHF	
January	273'507	250'972	-8.2%
February	277'500	251'320	-9.4%
March	351'850	0	
April	395'421	0	
May	405'460	0	
June	298'257	0	
July	205'737	0	
August	232'924	0	
September	377'512	0	
October	393'656	0	
November	409'781	0	
December	330'756	0	
year to date	551'007	502'292	-8.8%

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 February)

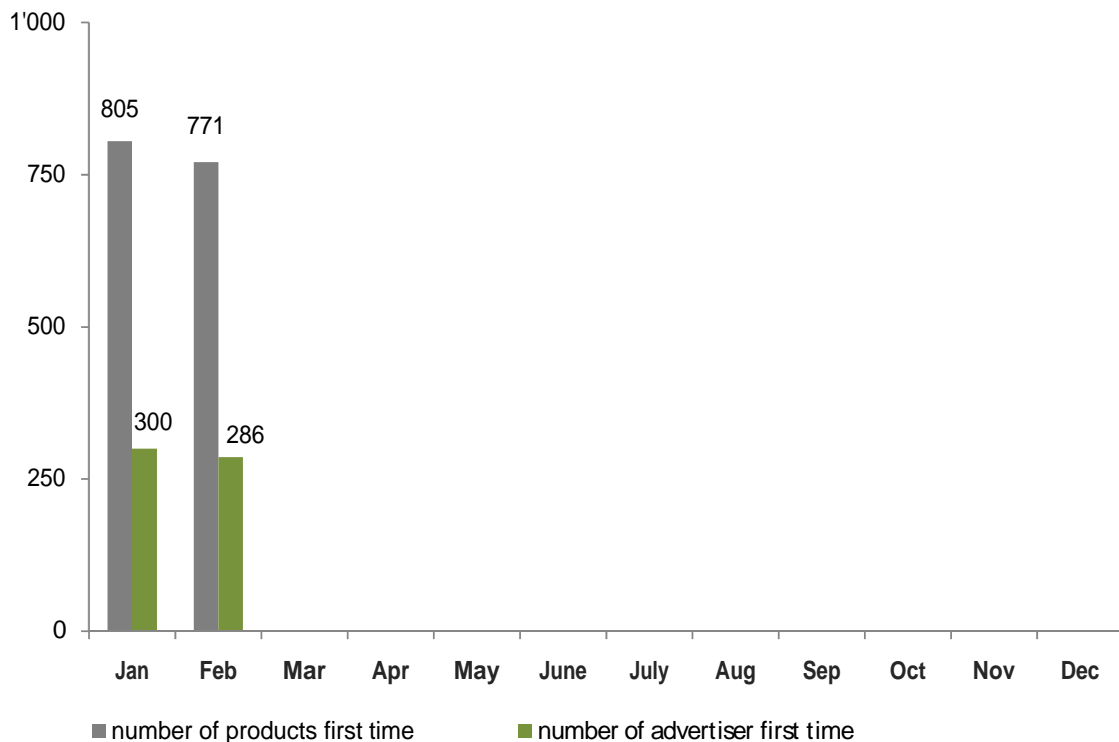


3. Evolution advertising pressure per key market

Position	Key Market	February 2009		2009 cumulative	
		TCHF	+/- PY %	TCHF	+/- PY %
	All key markets	251'320	-9.4	502'292	-8.8
1	Clothes / Sports / Leisure	3'701	-12.0	7'521	-15.8
2	Services	12'794	-24.3	26'968	-25.2
3	Energy	1'851	18.9	3'017	5.3
4	Automotive	32'732	-2.3	57'503	-10.5
5	Finance / Insurances	18'714	-27.8	37'087	-28.4
6	Public Benefits	5'239	-19.7	13'579	-6.0
7	Beverages	6'077	-30.9	13'292	-23.9
8	Household Devices	8'752	15.8	15'778	12.4
9	IT	2'391	-32.1	5'592	-26.8
10	Cosmetics / Body Care	23'426	30.6	36'723	16.6
11	Furniture / House / Garden	10'470	-10.9	20'178	-15.5
12	Food	24'063	-12.2	45'664	-12.6
13	Pharma / Health	9'257	26.3	21'599	25.8
14	Political Campaigns	6'386	49.3	18'765	180.4
15	Tobacco	1'209	173.4	2'182	156.5
16	Telecommunications	16'181	-11.9	27'802	-16.2
17	Tourism / Transport	15'298	-11.0	34'451	-10.2
18	Entertainment Dev./ Photo/ Motion Pictures	11'039	-21.5	22'012	-16.7
19	Watches / Jewelry	1'584	-28.1	4'271	-6.7
20	Other smaller markets	15'197	-17.5	33'124	-9.6
21	Assortment Advertising*	18'155	-5.8	41'719	-3.5
22	Image Advertising*	6'804	-34.2	13'465	-28.1

* 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	PROCTER & GAMBLE
5	NESTLE
6	SUNRISE COMMUNICATIONS
7	SWISSCOM
8	RECKITT-BENCKISER
9	ORANGE COMMUNICATIONS
10	UNILEVER

* product-, assortment- and image-advertising

Top 10 products

position	products*
1	AXA WINTERTHUR SPARKONTO PLUS
2	HYUNDAI I20 PKW
3	TRISA SONIC POWER EL. ZAHNBUESTER
4	SUNRISE ADSL 5000
5	SIMIQ MOBILE MOBILE CONTENT
6	VW TIGUAN SUV
7	SUNRISE FREE INTERNET
8	ORANGE INTERNET EVERYWHERE
9	PEUGEOT 308 SW PKW
10	TOYOTA IQ PKW

* 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 February 2009

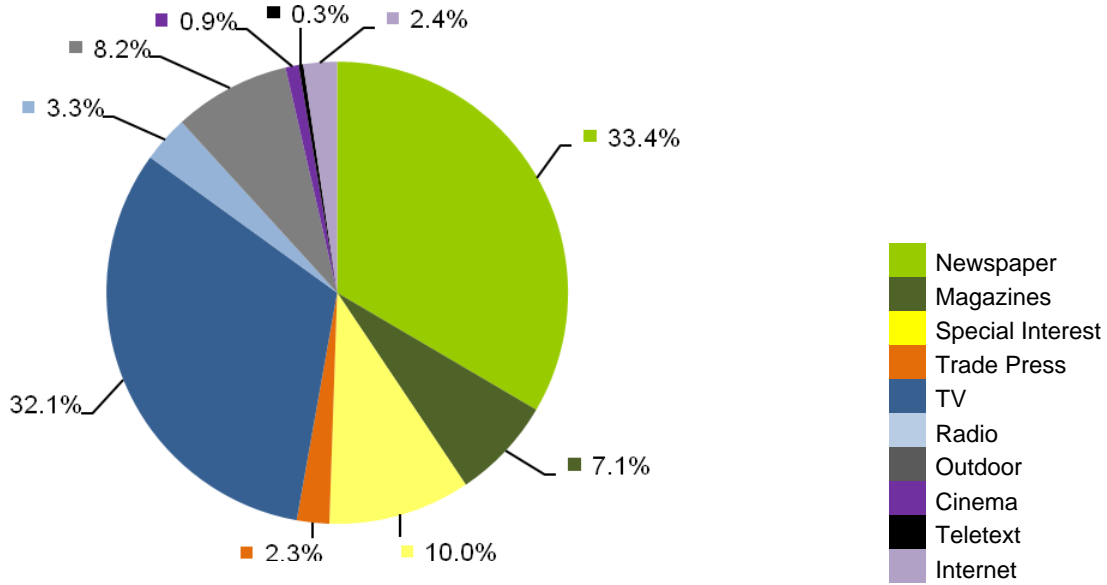


Chart: Allocation of advertising pressure per media group Year to Date as per February 2009

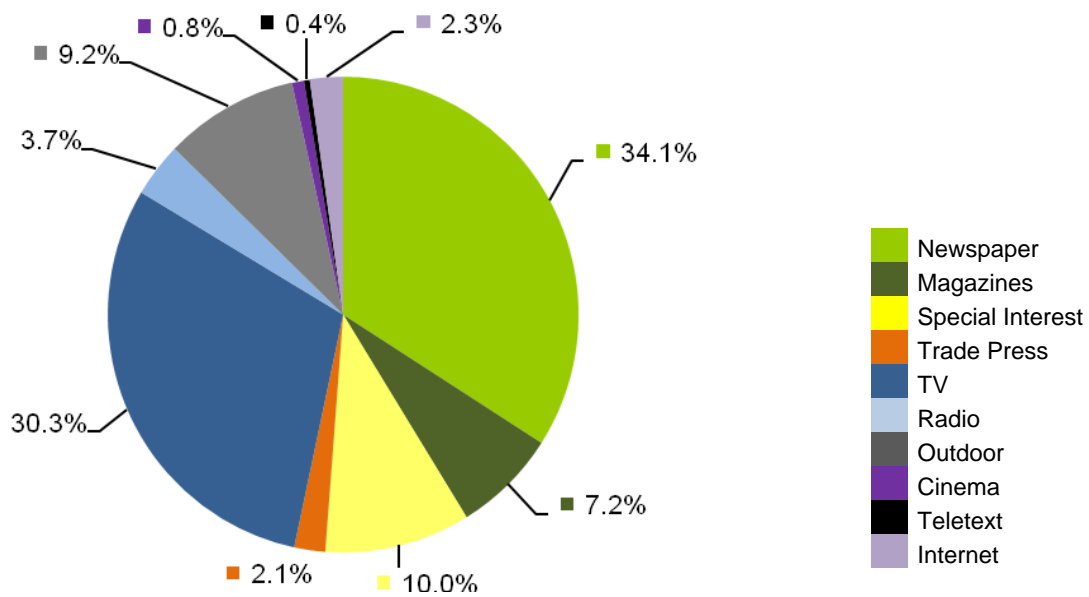
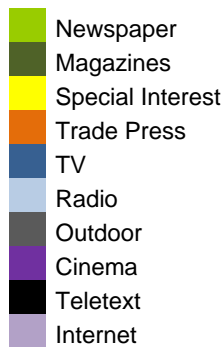
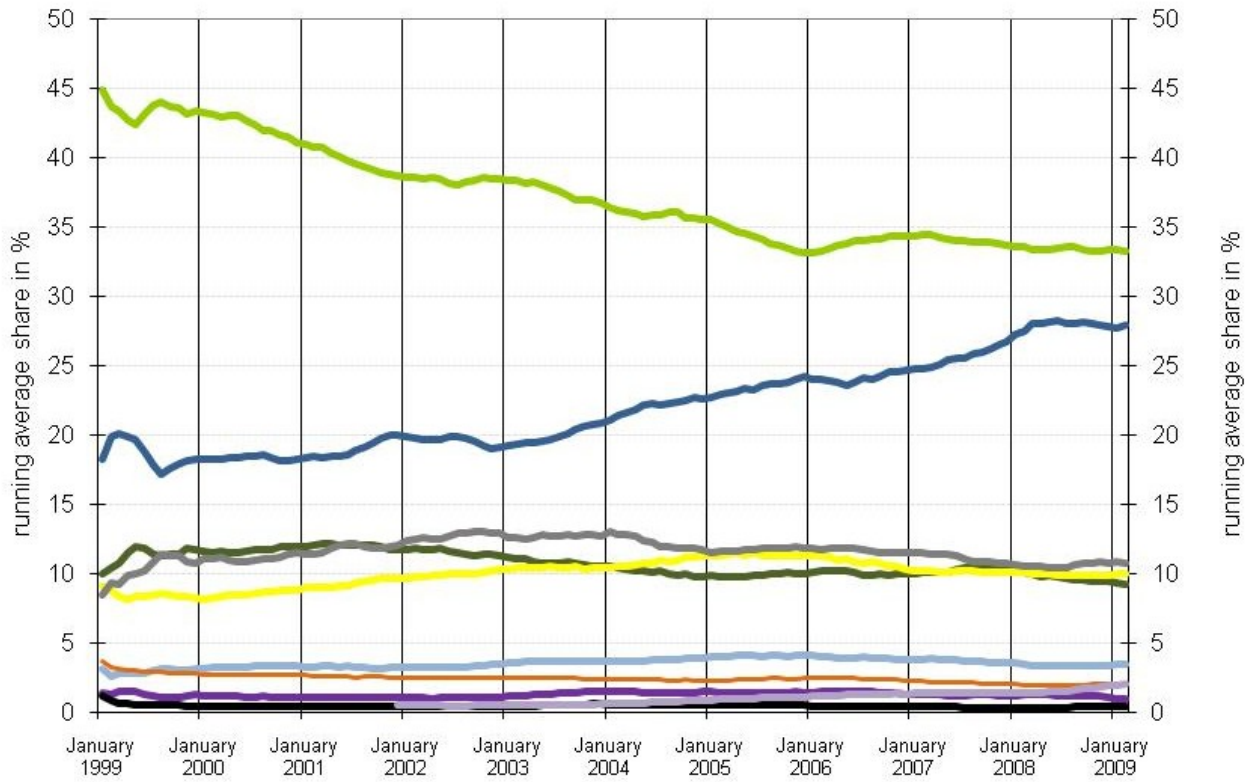


Chart: Monthly running average advertising pressure allocation in the media groups



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 - GfK Switzerland 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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