

Media Focus

Ad Market Trend

Report 2009/01

Monthly report on Swiss advertising market

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1. Data month January 2009: Highlights

The advertising market has arrived in the real world. A minus of 8.7% indicates that the new year starts quite badly. In the former year there has been more than 10% increase in comparison to January 2007.

Except from „Internet“, „Radio“ and „Teletext“ all media loose advertising pressure compared to January 2008. The biggest decrease happens in media „Cinema“ (-44.7%) and „Magazines“ (-24.3%).

The advertising market „Fahrzeuge“ has a -19.4% drop in January 2009. Within the product group „PKW (NEU)“ there are some significant different trends such as: „Luxusklasse“ -99.8% (-861 TCHF), „Geländewagen/SUV“ -44.1% (-2'688 TCHF) and „Obere Mittelklasse“ -43.5% (-106 TCHF). On the other hand, small and middle classed cars have an increasing advertising pressure in the same period. [see segments „Mittelklasse“ +4.9% (+236 TCHF) and „Vans/Minivans“ +13.2% (+154 TCHF)].

The key market „Telekommunikation“ shows a minus of 22.4%. Remarkable are the numerous displacements within the branch. After the product group „Mobile“ showed a sevenfold higher advertising pressure compared to the group „Internet“ in January 2008, both sub-segments are on eye level in January 2009. The product group „Internet“ raises at 221% (+3.1 Mio. CHF), strongly driven by the close fight of various ADSL-Campaigns addressed to private households in the segment „Internet B2C“ with a plus of 297% (+2.7 Mio. CHF). On the contrary the offers for mobile phones are advertised much less, for which reason the advertising pressure in the product group „Mobile“ decreases by 53.9% (-2.5 Mio. CHF) in the actual data month. Furthermore the buy-out of Tele2 by Sunrise reduces advertising activities in this sub-segment.

The key markets **„Politische Kampagnen“ (+412.5%)** and **„Gemeinnützige Kampagnen“ (+5.4%)** show a positive development in comparison to the same period in the last year.

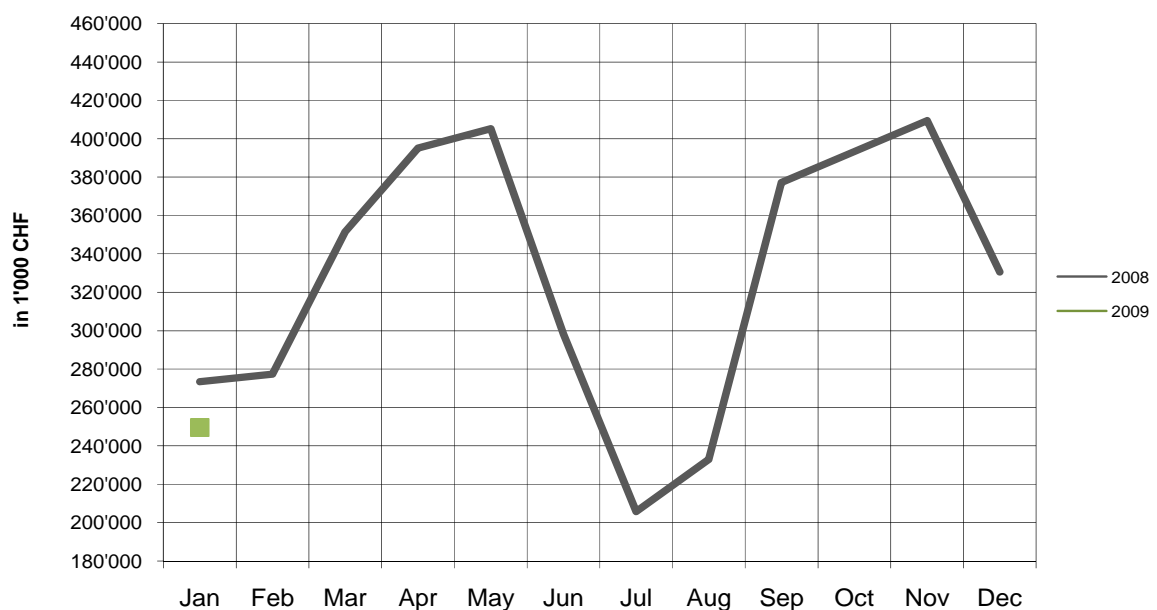
2. Evolution advertising pressure total market

Chart: Advertising pressure trend 2009 (update January)

Month	2008	2009	+/- %
	TCHF	TCHF	
January	273'330	249'511	-8.7%
February	277'288	0	
March	351'573	0	
April	395'188	0	
May	405'183	0	
June	298'100	0	
July	205'650	0	
August	232'820	0	
September	377'266	0	
October	393'460	0	
November	409'516	0	
December	330'529	0	
year to date	273'330	249'511	-8.7%

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 January)

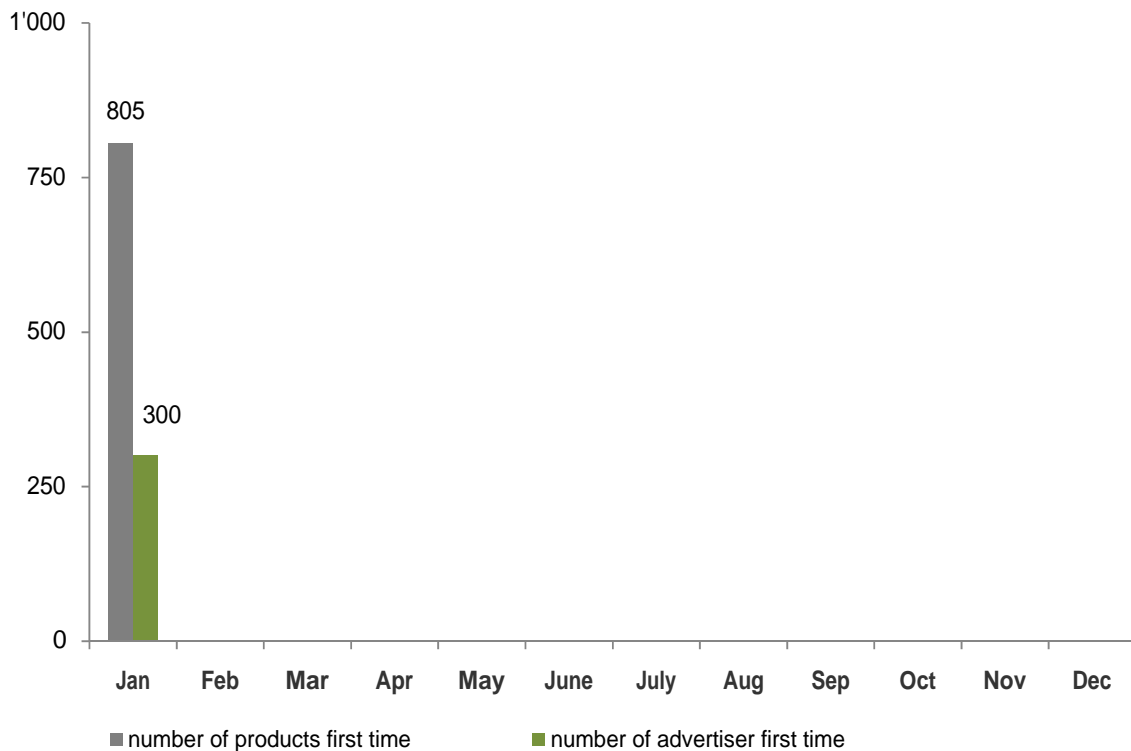


3. Evolution advertising pressure per key market

Position	Key Market	January 2009		2009 cumulative	
		TCHF	+/- PY %	TCHF	+/- PY %
	All key markets	249'511	-8.7	249'511	-8.7
1	Clothes / Sports / Leisure	3'822	-19.1	3'822	-19.1
2	Services	14'055	-26.6	14'055	-26.6
3	Energy	1'162	-11.2	1'162	-11.2
4	Automotive	24'711	-19.4	24'711	-19.4
5	Finance / Insurances	18'303	-29.2	18'303	-29.2
6	Public Benefits	8'323	5.2	8'323	5.2
7	Beverages	7'212	-16.8	7'212	-16.8
8	Household Devices	7'014	8.2	7'014	8.2
9	IT	3'168	-22.8	3'168	-22.8
10	Cosmetics / Body Care	13'280	-2.1	13'280	-2.1
11	Furniture / House / Garden	9'691	-20.0	9'691	-20.0
12	Food	21'494	-13.5	21'494	-13.5
13	Pharma / Health	12'277	24.7	12'277	24.7
14	Political Campaigns	12'347	412.5	12'347	412.5
15	Tobacco	961	135.4	961	135.4
16	Telecommunications	11'498	-22.4	11'498	-22.4
17	Tourism / Transport	18'991	-10.3	18'991	-10.3
18	Entertainment Dev./ Photo/ Motion Pictures	10'945	-11.5	10'945	-11.5
19	Watches / Jewelry	2'685	13.0	2'685	13.0
20	Other smaller markets	17'697	-2.8	17'697	-2.8
21	Assortment Advertising*	23'275	-2.9	23'275	-2.9
22	Image Advertising*	6'601	-21.3	6'601	-21.3

* 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	NESTLE
4	L'ORÉAL
5	PROCTER & GAMBLE
6	UNILEVER
7	AXA WINTERTHUR
8	SWISSCOM
9	MEDIA MARKT
10	RECKITT-BENCKISER

* product-, assortment- and image-advertising

Top 10 products

position	products*
1	CABLECOM HISPEED
2	SKODA OCTAVIA KOMBI PKW
3	HYUNDAI I20 PKW
4	SIMIQ MOBILE MOBILE CONTENT
5	AXA WINTERTHUR SPARKONTO PLUS
6	COCA COLA ZERO
7	FELDSCHLOESSCHEN ALKOHOLFREI
8	WWW.PHARMA-FORSCHUNG.CH
9	WWW.HELVETICTOURS.CH
10	BLUEWIN 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 January 2009

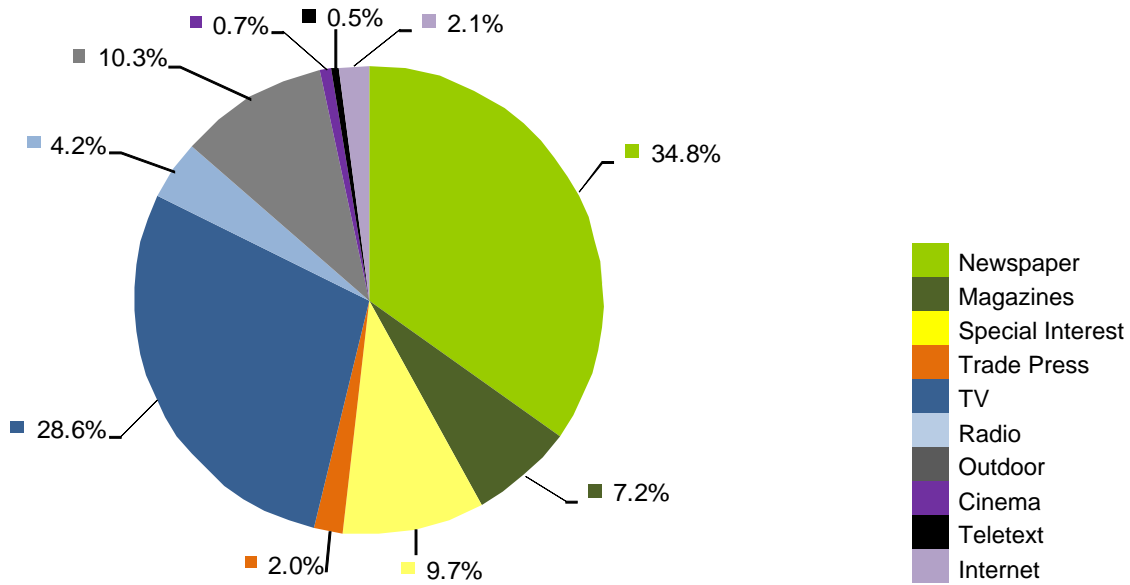


Chart: Allocation of advertising pressure per media group Year to Date as per January 2009

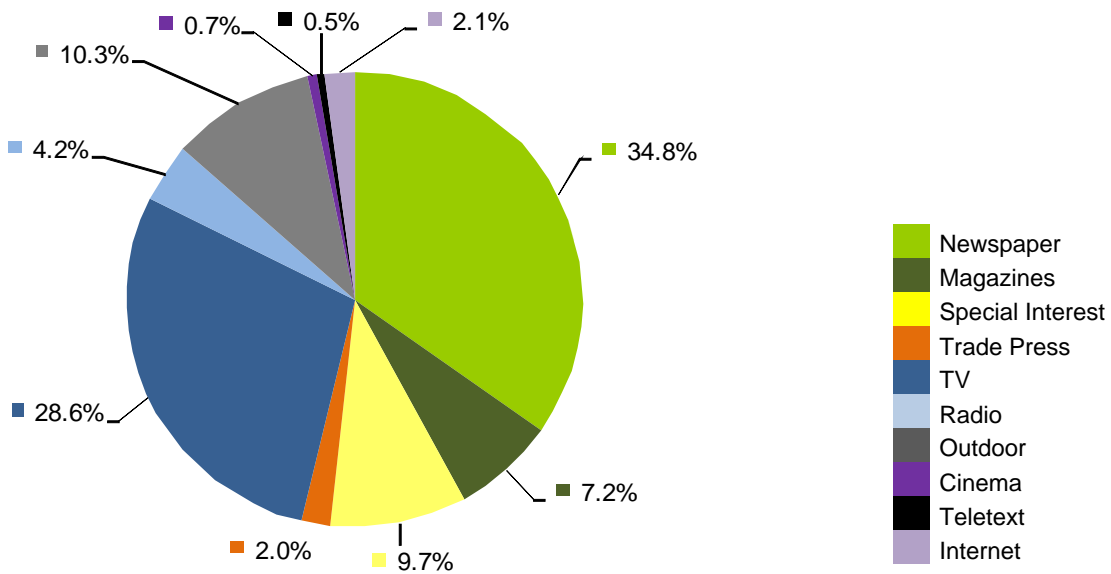
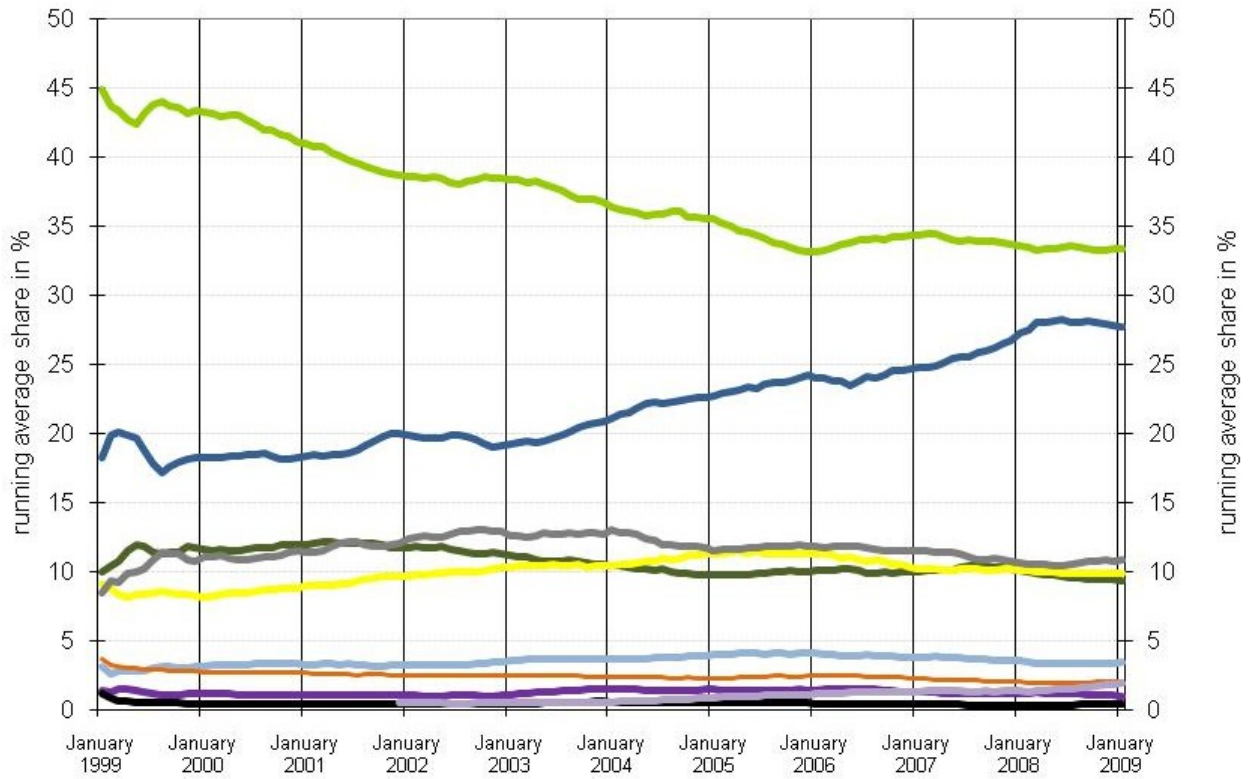


Chart: Monthly running average advertising pressure allocation in the media groups



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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