

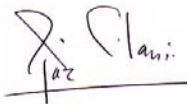
Introduction to Gallup Cyber-letter

We are sending you this Cyber-letter, a Newsletter through the Internet, as a test run. It includes an assortment of Information which we feel you might like to read while the data are still fresh. Normally the logistics of printing a hard copy delays the delivery process.

Please send us your feedback

We shall be keen to receive your feedback on this first attempt of Gallup Cyber-letter on Media Research. Please do fill in a couple of questions and mail them back to us.

Thanking you and with regards,



Dr. Ijaz Shafi Gilani
Chairman, Gallup

Feedback from Readers

1. Would you like to receive the Gallup Cyber-letter on an on-going basis through email?
Yes No
2. Assuming that all options were available, would you prefer to receive the Gallup Cyber-letter on Media on a Weekly, Fortnightly or monthly basis?
Weekly Fortnightly
Monthly
3. If we requested you to send in your ideas or news emanating from your organisation to be published in the Cyber-letter, would you be interested?
Definitely Possibly
Not Interested

TV AD-EX

Lever maintained its top position in advertising expenditure in July, while P&G climbed to the Number 2 position.

Top 10 advertisers accounted for 65% of total TV ad spend during the month.

See detailed table of top 10 advertisers on the following page.

TOP RATED TV PROGRAMS

The top rated PTV plays continued to fetch large audiences at the national level. But they faced tough competition from satellite channels in homes which have access to cable TV or satellite dishes. The pattern observed in June continued to show up in July as well.

See table of top 10 programs on the following page.

BANKS WERE THE TOP THREE ADVERTISERS IN NEWSPAPERS DURING JULY

While banks were the top 3 advertisers in newspapers during July, others in the top 10 list included a wide range of goods including cigarettes, soap, facial cream, watches, automobiles and slimming pills/capsules.

See the table for Top 10 on the following page.

TV ADVERTISING EXPENDITURE IN JULY 2001

The TV ad spend (on rate card basis) was _____ in July.

Compared to June the top ten advertisers accounted for 65% of the total ad spend while the comparable figure in June was 59%. It seems the top ten advertisers have a pattern of adding up to around 60% of total ad spend although individual players change places from month to month.

Levers once again stayed on top. Procter and Gamble climbed up to number two position and Lakson Group was third among the top ranking TV advertisers.

TOP 10 TV ADVERTISERS July 2001

The expenditure in this table is by Company or Group, combining all brands advertised by them on television. Just in case there are any errors or omissions, the editors would be happy to make the rectification

Percentages have been rounded off to whole numbers.

Percent share in advertising value.

1	Lever Brothers	20%
2	Procter & Gamble	13%
3	Lakson Group*	12%
4	Pakistan Tobacco Company	6%
5	Reckitt Benckiser	5%
7	New Electronics (Samsung)	3%
8	Coca Cola	2%
9	Continental Biscuits	2%
10	Nestle Milkpak	2%
11	English Biscuit Manufacturers (EBM)	1%

*Includes Lakson Tobacco and Colgate Palmolive

There are interesting shifts in advertising expenditure from month to month. Some companies make it to the list and others drop out. The ranks also change. We will continue to report on them. For details write to adtrak@gallup.com.pk

NEWSPAPER ADVERTISING

The newspaper advertising is of particular interest because at present its clientele is very different from TV advertising. In terms of branded goods or branded services banks were the top 3 advertisers in newspapers during the month of July. Other advertised items include cigarettes, soap, facial cream, a watch brand, an automobile brand and a family planning pill. However the advertising expenditure of any one of item remained to be a very small fraction of total advertising revenue of newspapers.

The following Table provides the ranking of top 10 brands of goods and services.

Top 10 Brands Advertised in Newspapers July 2001

Percent share in total value of advertising (Rate Card basis)

1	UNION BANK LTD.*	1.5%
2	MUSLIM COMMERCIAL BANK*	1.1%
3	STANDARD CHARTERED GRINDLAYS*	0.8%
4	GOLD LEAF CIGARETTES	0.7%
5	ROLEX	0.7%
6	LG ELECTRONICS	0.6%
7	LUX SOAP	0.5%
8	KIA NGV	0.4%
9	POND'S CREAM	0.4%
10	OBENIL CAPSULE	0.3%
11	SANTRO PLUS GX & GS CAR	0.3%

* All services offered by a bank are treated as sub-brands and therefore grouped under the bank name which effectively also becomes the brand name for all such services. For instance the total grouped value of Muslim Commercial Bank includes corporate advertising, MCB ATMs, credit card services etc.

**Obenil Capsules are slimming capsules. Most of the advertising was in Urdu newspapers. However the frequency of advertising just about enabled them to edge over the Santro Plus car in expenditure terms (on rate card basis).

TOP RATED TV PLAYS

The top rated TV plays continued to win large audiences at the country wide level. But they faced strong competition from satellite TV in homes which have access to cable TV or satellite dishes. The viewership in cable and sat homes gets fragmented among Sony, Star Plus, Zee and PTV channels besides several other satellite channels. The following table reflects the same pattern as the last month. The viewership of leading PTV plays drops dramatically in Cable and Sat homes especially in Karachi where Cable and Sat penetration is very high.

August 1-7, 2001

AUDIENCE OF TOP 10 OF PTV AMONG SAT & NON-SAT HOMES

Program Name	Ratings Among			
	All Homes	Non C&S Homes National	C&S Homes National	C&S Homes Karachi
DAM-E-RASAI	41	47	11	10
PEHLI BARISH	40	45	11	10
ARMAN	39	44	10	5
AIK UMEED	39	45	7	6
MUSKARAHAT	39	45	6	5
MOME KA CHEHRA	39	44	11	9
AAINA	34	39	7	7
BOX OFFICE	28	31	6	2
THE INCREDIBLE	28	32	7	5
BUS BAY BUS	27	31	6	7

We have analyzed data spanning over one year and the same pattern is sustained

** Ratings refer to proportion of TV viewers watching the program during a 15 minute time slot, on average, among the relevant group.*

** C&S = Cable and Satellite Homes, that is homes with access to satellite channels (other than PTV World Satellite Transmission).*

	CHANNEL	DAY	FROM	TO	TITLE	GENRE	Rating %	Reach %
1	ZEE TV	Wed	8:00:00 PM	8:29:00 PM	MEHNDI TERE NAAM KI	Play	11.9	12.3
2	ZEE TV	Thu	8:00:00 PM	8:29:00 PM	AMANAT	Play	11.3	11.6
3	ZEE TV	Fri	8:00:00 PM	8:29:00 PM	AASHIRWAD	Play	11.0	11.0
4	ZEE TV	Mon-Thu	8:30:00 PM	8:59:00 PM	CHANDAN KA PALNA RESHAM KI DORI	Play	8.3	9.0
5	ZEE TV	Fri	9:00:00 PM	9:29:00 PM	KHAMOSHIYAN	Play	8.0	8.5
6	ZEE TV	Mon-Fri	7:30:00 PM	7:59:00 PM	BABUL KI DUWWAEIN LETI JA	Play	7.4	8.8
7	ZEE TV	Tue	8:00:00 PM	8:29:00 PM	BASERA	Play	6.7	7.1
1	Sony	Tue	8:00:00 PM	8:29:00 PM	TU NASEEB HAI KISI AUR KA	Play	13.4	13.6
2	Sony	Mon-Thu	8:30:00 PM	9:04:00 PM	KUSUM	Play	12.5	15.4
3	Sony	Fri	9:05:00 PM	9:34:00 PM	HINA	Play	12.0	13.4
4	Sony	Friday	8:35:00 PM	9:04:00 PM	BOOGIE WOOGIE	Shows	11.1	14.4
5	Sony	Fri,Sun	7:30:00 PM	8:34:00 PM	JEETO CHAPAD PHAD KE	Shows	10.7	15.1
6	Sony	Mon-Thu	9:05:00 PM	9:44:00 PM	KAHIN DIYA JALE KAHIN JEEYA	Play	10.2	12.3
7	Sony	Wed	7:30:00 PM	7:59:00 PM	SHAHEEN	Play	8.5	9.3
8	Sony	Thu	2:30:00 PM	2:59:00 PM	ALPA VIRAM	Play	7.2	7.6
1	Star Plus	Mon	9:30:00 PM	9:59:00 PM	KAHAANI GHAR GHAR KI	Play	10.6	11.3
2	Star Plus	Tue	10:00:00 PM	10:29:00 PM	KYUNKI SAAS BHI KABHI BAHU THI	Play	10.1	10.6
3	Star Plus	Mon-Wed	8:30:00 PM	9:29:00 PM	KAUN BANEGA CROREPATI	Shows	7.5	11.2
4	Star Plus	Fri	9:30:00 PM	10:29:00 PM	SSSHHHH.. KOI HAI	Play	6.8	8.9
5	Star Plus	Fri	8:30:00 PM	9:29:00 PM	KHUL JA SUM SUM	Shows	6.7	11.0
6	Star Plus	Thu	8:30:00 PM	8:59:00 PM	KORA KAGAZ	Play	6.6	7.7
7	Star Plus	Mon-Thu	8:00:00 PM	8:29:00 PM	KAHIN KISI ROZ	Play	6.1	6.3
8	Star Plus	Fri	7:30:00 PM	8:29:00 PM	KYA MASTI KYA DHOOM	Others	3.8	6.6

Please note that the shaded programs can be included since they are more popular than others, based on personal observation, and observing viewership patterns of friends, family etc. Also the number of program promos/previews for these are much higher than for others. This gives an idea as to how popular they are. The newly launched programs on Star Plus are slowly edging towards higher ratings. We can venture to mention this, especially since ratings have reached the “6” barrier.