

GALLUP PAKISTAN BRANDS REFERENDUM 2011 (Draft Version for limited Circulation)

Top Brands in Pakistan



World Leaders in Marketing Research & Consultancy

September, 2011



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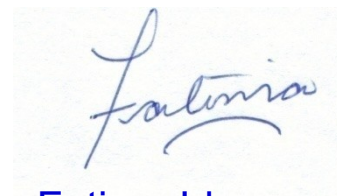
INTRODUCTION

Gallup Pakistan undertook the project, **Brands Referendum 2011**, the aim of which was to analyze the different brands available to consumers for various commodities, and their success rates with respect to the market they have so far managed to capture.

This presentation is divided into **7 Sections** and has a Highlights section which summarizes the Main Findings of the Study.

This is a draft version of the Report, circulated only together feedback and recommending errors in this version can be expected and therefore this version should be quoted with certain.

For any queries or clarifications, the undersigned can be contacted.



Fatima Idrees
Group Manager, Gallup Pakistan
August 18, 2011

Highlights

Section 1: Beauty Products

A. Soap

- According to 42% of the people questioned, 'Lux' is the first brand that comes to mind when they hear the name 'soap', followed by Lifebouy at 19% and Safeguard at 15% respectively.
- 34% percent of respondents said Lux was the one brand whose advertisements they recall seeing on Television/Newspaper/Billboards. Next in line was Lifebouy at 16% and Safeguard at 10%.
- The survey suggests that the brand Lux is being used the most by 33% of people questioned, seconded by Lifebouy at 23% and Safeguard at 17%.

B. Shampoo

- When the word 'Shampoo' is heard, Sunsilk is the first brand that comes to mind according to 32% of the sample, whereas its Head & Shoulders for the other 16% and Pantene for 14% of the people questioned.
- Sunsilk is reported to have been recalled the most out of all the shampoo advertisements on Television/Newspaper/Billboards at a total of 26% followed by Head & Shoulders and Pantene, both at 12% each.
- 29% of respondents said Sunsilk was the one shampoo brand they use the most. Second in line is Head & Shoulders at 16% and Pantene at 14% respectively



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C. Body Lotion

- 8% of the sample population said Care was the first brand they thought of when hearing the word 'Body Lotion', whereas a total of 6% percent thought of Ponds.
- Advertisements of Care and Ponds were recalled most by the respondents at 5% each followed by Olivia at 4%.
- According to the survey, Care and Ponds is used most by 5% of the sample population. Dove and Olivia stand second at 3% each.

Section 2: Food Items

A. Tea

- Supreme and Tapal were the top-most thought of brands, at 23% each with Lipton at a total of 21%.
- Respondents were able to recall advertisements for three brands the most, namely Supreme, Tapal and Lipton, all three of which were 17% each.
- Tapal is being used by 24% of the people questioned, followed by Supreme (21%) and Lipton (15%)



..... Continued

B. Cooking Oil

- While discussing Cooking Oil brands, it is reported that 14% people thought of Dalda first with Habib at 12% and Sufi at 10% respectively.
- 11% of the population questioned managed to recall Dalda's advertisements first. Next in line were those of Habib (10%) and Kisan (7%).
- 11% of the people use Dalda the most, followed by Habib (9%) and Sufi (8%).

C. Milk

- Fresh Milk was thought of by 22% of the respondents followed by 15% for Tarang and 13% for Olpers respectively.
- Advertisements for Tarang were recalled the most, at a percentage of 18, with Olpers and Haleeb both at 10% each.
- Fresh milk is reported to have been used by 31% of the sample population succeeded by three brands at 10% each, namely Haleeb, Olpers and Tarang.



..... Continued

D. Biscuit

- When hearing the word 'biscuit', Sooper is the first brand that comes to mind according to 28% of the respondents succeeded by Rio at 10% and Bakery at 8% respectively.
- Sooper advertisements (19%) were recalled the most followed by Rio at 9%, and Bakery and Tuc at 6% each.
- Sooper biscuits (27%) are most commonly consumed, followed by Bakery (9%) and Gala (7%).

E. Ice-cream

- Walls ice-cream came to mind first for 29% percent of the people questioned, followed by Yummy (10%) and O'more (8%).
- Walls advertisements were recalled the most according to 22% of the sample population, next in line being O'more at 9% and Yummy at 7% respectively.
- Walls ice-cream comes first yet again, as the most-commonly consumed brand, standing at 26% followed by the local ice-cream (6%).



..... Continued

Section 3: Home Appliances

- **Refrigerator**

- When the word refrigerator was brought up, 28% of the people questioned thought of Dawlance whereas 12% thought of Waves followed by PEL at 11%.
- Dawlance's advertisements were most widely recalled, at a total of 26%, second in line being Waves at 12% respectively.
- Further, Dawlance also happens to be the brand most used by the sample population followed by Waves and PEL, at 28%, 12% and 11% each.

- **B. AC**

- When the word AC was heard, 11% of people surveyed thought of Dawlance and Haier each, where 10% thought of PEL and 9% of LG.
- 11% of respondents recalled seeing adverts of Haier the most, whereas it was 8% for PEL and 7% for Dawlance.
- Haier is the most-commonly used Air Conditioner amongst 7% of the sample population, with Dawlance (6%) holding second place.



..... Continued

C. Washing Machine

- 22% of people have been reported to state Super Asia as the first brand that comes to mind when hearing the word, Washing Machine. National and Dawlance come second with a percentage of 8 each.
- Super Asia's adverts were most-commonly recalled followed by Dawlance, corresponding to 14% and 9% respectively.
- Super Asia is used the most among 23% of the sample population. Dawlance comes next with a total of 8%.

D. Air Cooler

- Super Asia's air coolers were the first to be thought of among a total of 10% sample population, with no significant competitor.
- 5% of the people surveyed recalled seeing National's adverts the most, whereas the figure was 4% for Super Asia.
- Super Asia is widely used amongst 7% of the population followed by National at 5%.



..... Continued

Section4: Vehicles

A. Car

- The brand, Suzuki, came to mind when the word ‘car’ was heard, for a total of 14 percent, succeeded by Toyota and Honda at 11% each.
- 14% of respondents recalled seeing adverts of Suzuki the most, whereas 12% voted for Honda and 11% for Toyota.
- Suzuki cars are used most by a total of 14% of the people surveyed, whereas it was 12% for Honda and 11% for Toyota respectively.

B. Motor Vehicle

- When hearing the word ‘Motor Cycle’, 37% of the population thought of Honda, whereas 11% thought of CD70.
- Honda adverts were recalled most by 22% of the people, followed by Yamaha, CD70 and Unique all at 5% each.
- Honda also happens to be the most-commonly consumed motor vehicle for 26% of the people surveyed, with CD70 holding 9% respectively.



..... Continued

Section 5: Mobile Phones

A. Mobile Phone Hand Set

- Nokia got highest number of votes for brand recalled the most, at a 66%.
- Nokia's advertisements were also recalled the most by the people questioned at (39%).
- Nokia yet again, stands no competition as 'brand used the most' at 54%.

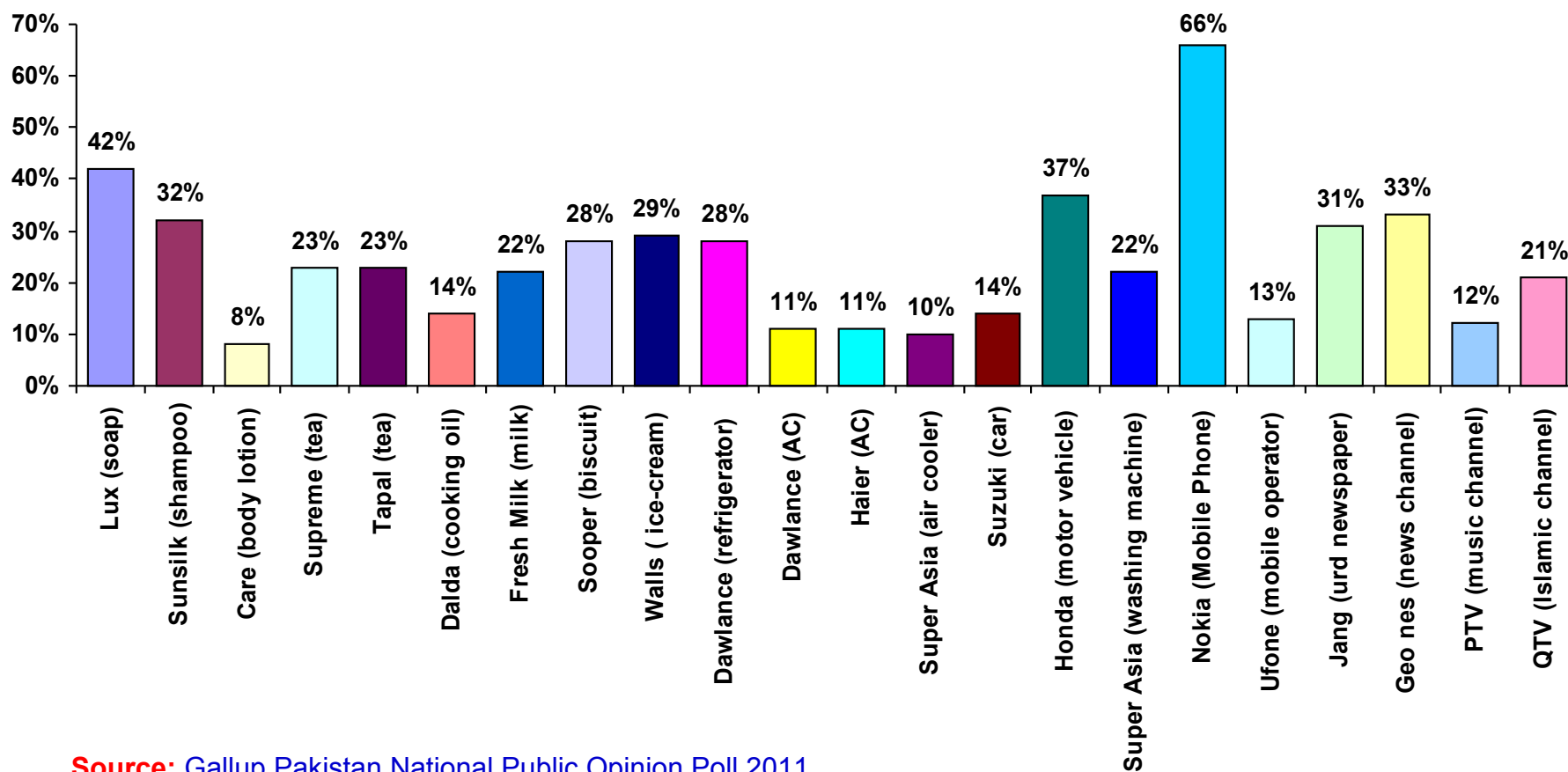
B. Mobile Operator

- Ufone (13%) with Jazz (12%) have been recalled the most by the Pakistani public.
- Ufone's advertisements were recalled the most by the respondents.
- Ufone (13%) and Jazz (12%) are being used the most by the people who were questioned.



TOP BRANDS ACROSS DIFFERENT PRODUCTS IN PAKISTAN

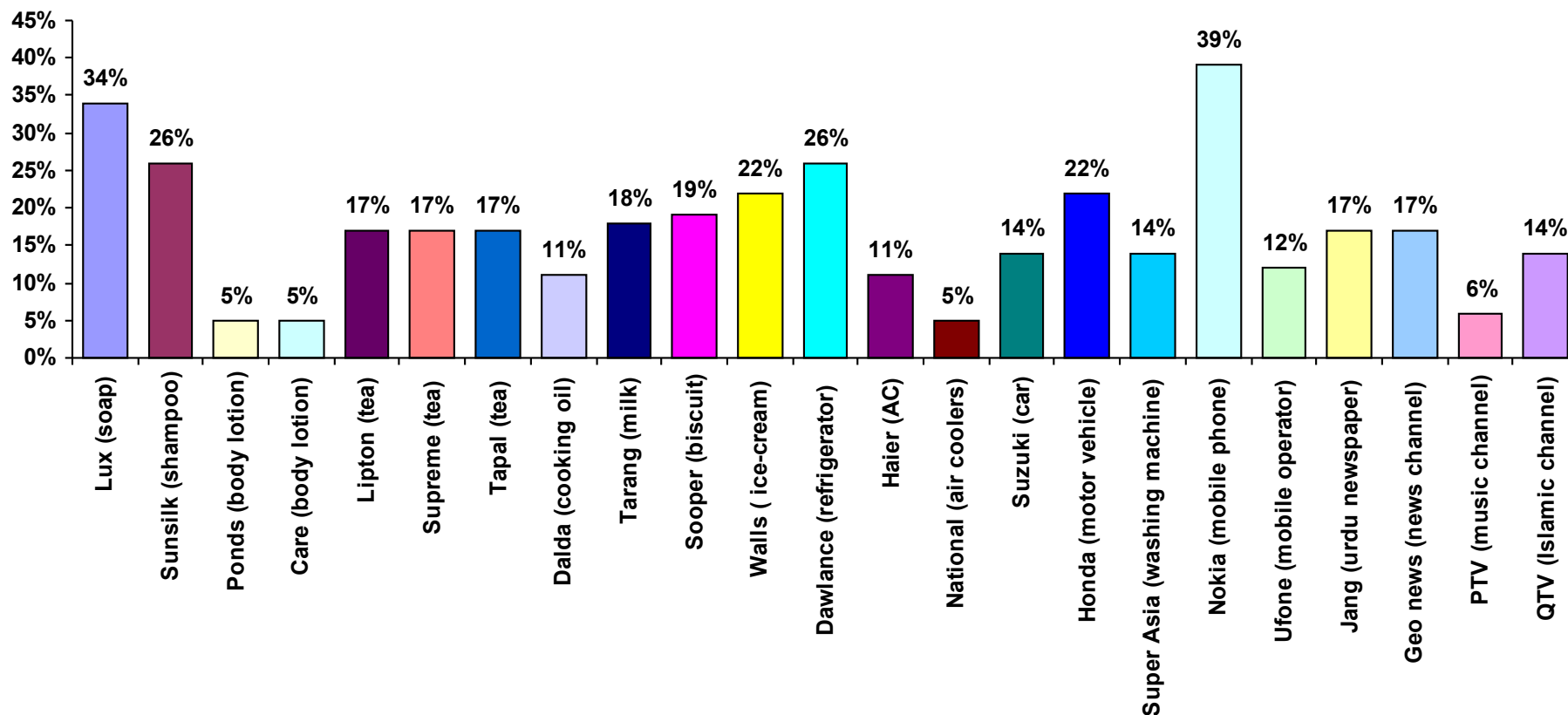
Top Brands Recalled



Source: Gallup Pakistan National Public Opinion Poll 2011

TOP BRANDS ACROSS DIFFERENT PRODUCTS IN PAKISTAN

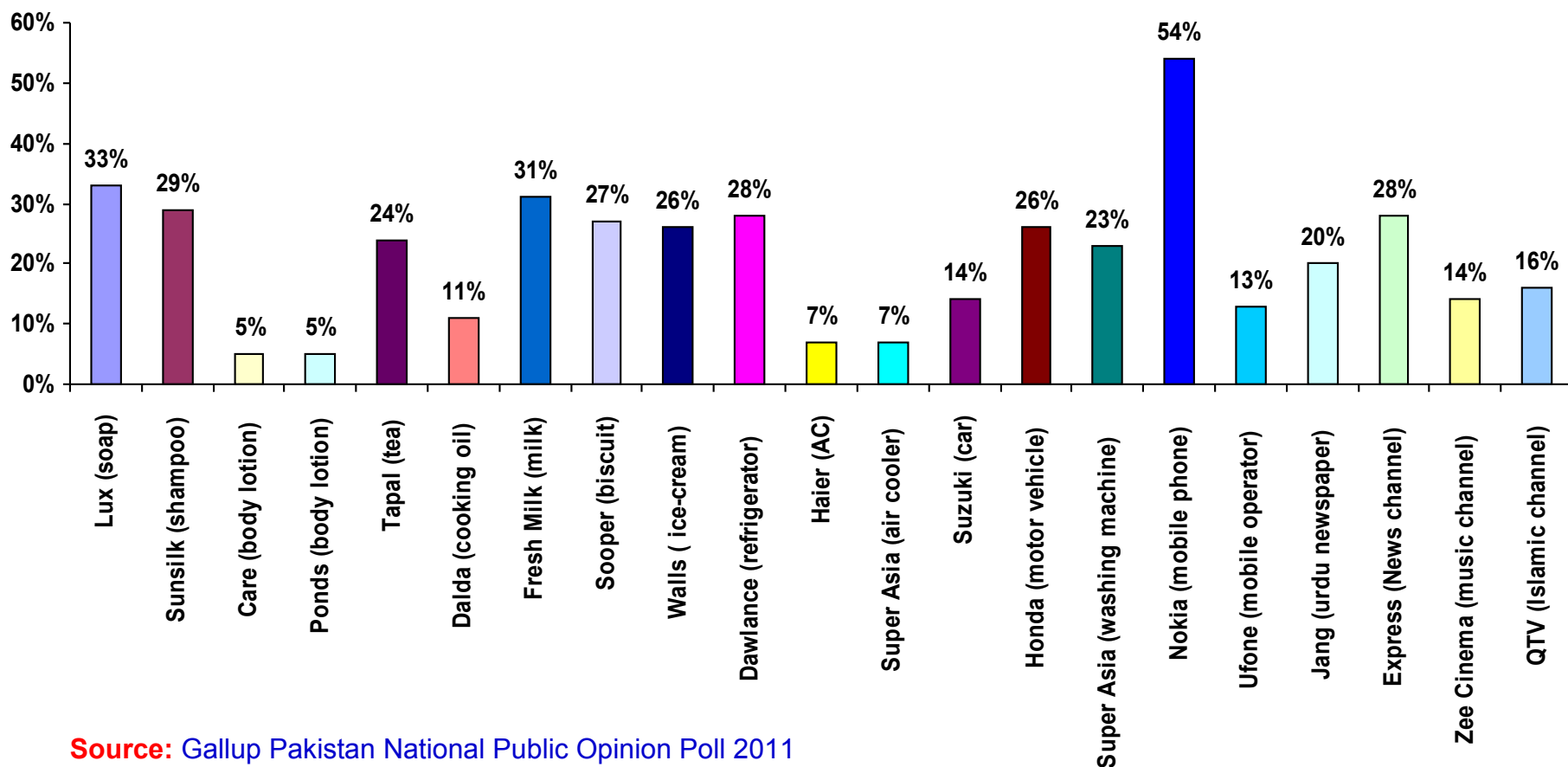
Top Advertisements Recalled



Source: Gallup Pakistan National Public Opinion Poll 2011

TOP BRANDS ACROSS DIFFERENT PRODUCTS IN PAKISTAN

Brands Used the Most



Source: Gallup Pakistan National Public Opinion Poll 2011

Section 1

Beauty Products



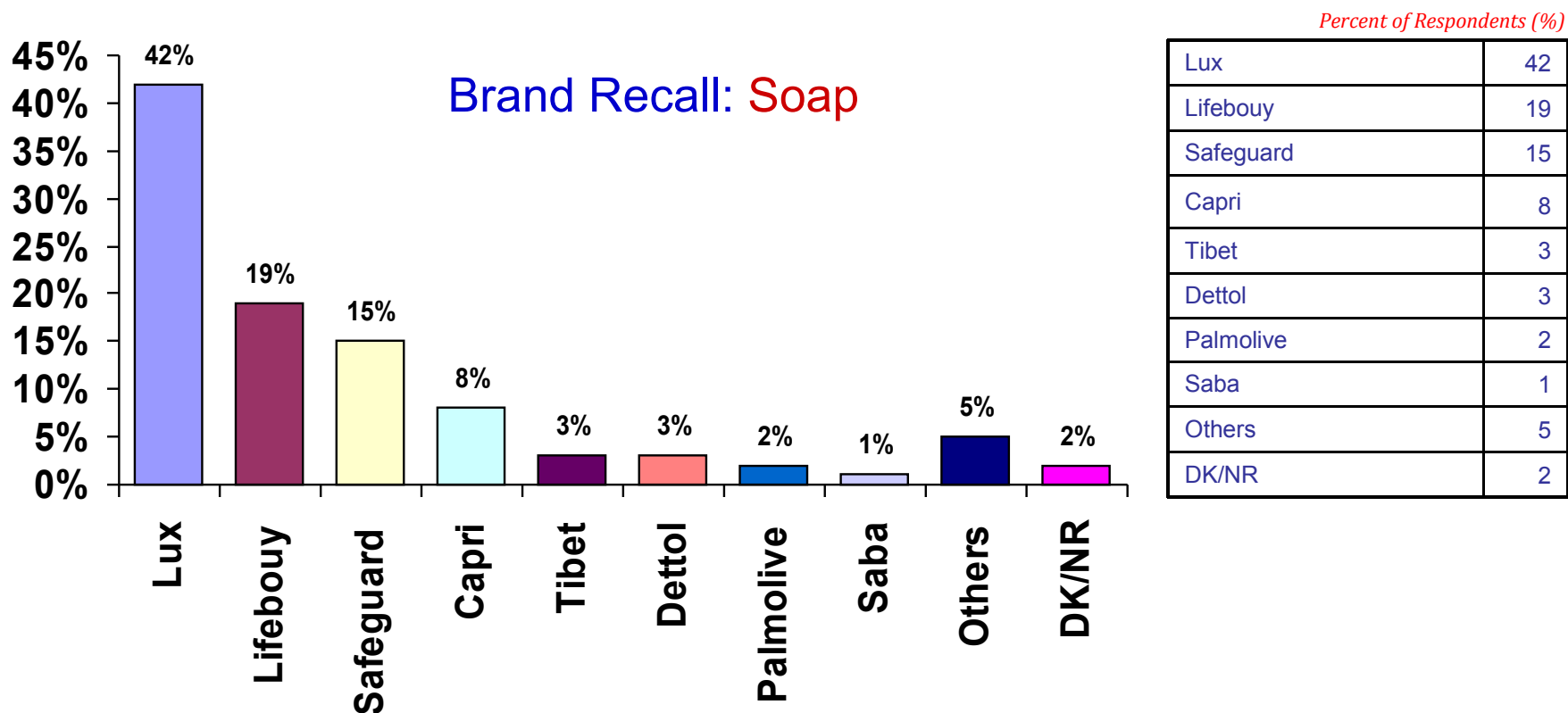
Section 1a

Soap



Brand Recall: Soap

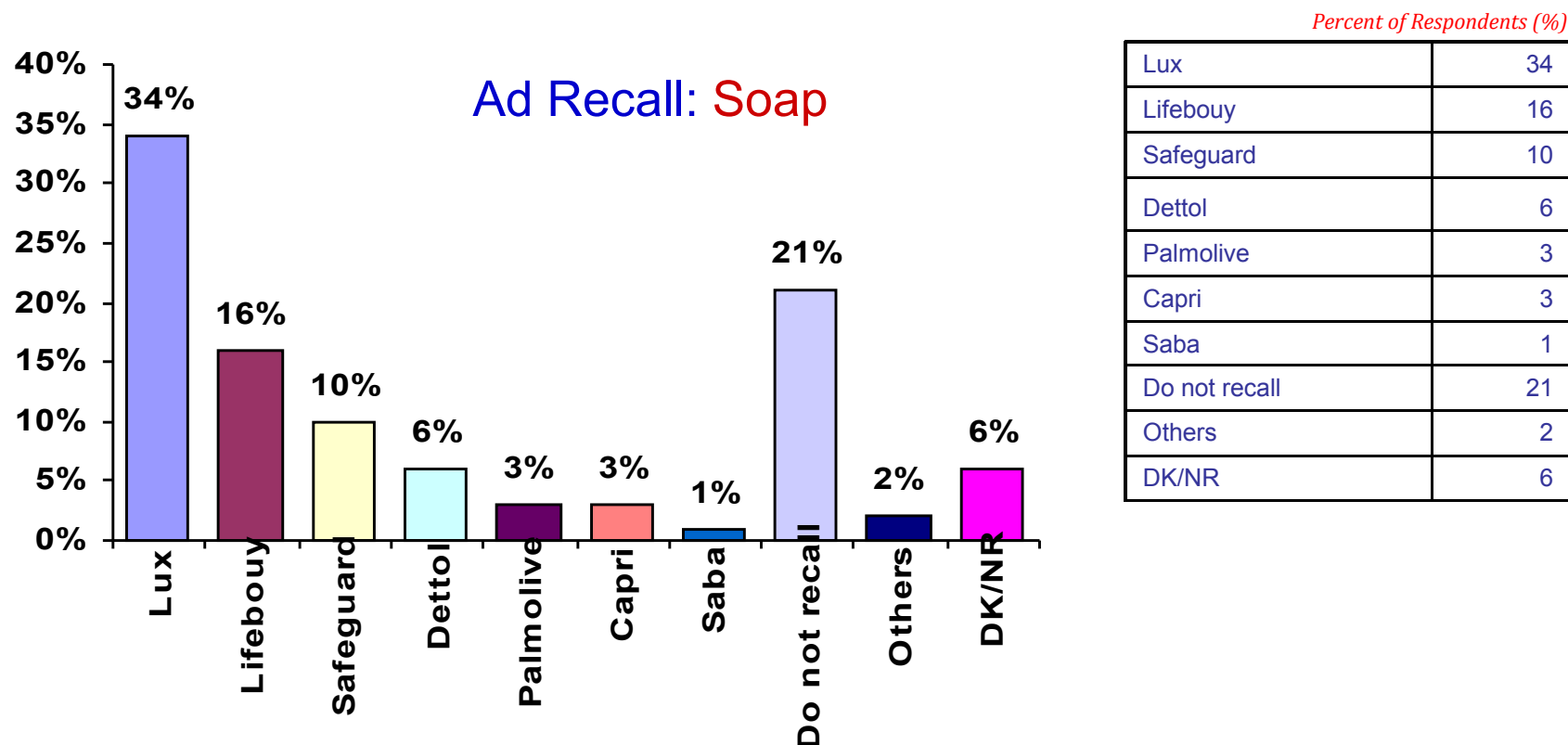
Question: When you hear the word 'Soap' what brand comes to mind?



Source: Gallup Pakistan National Public Opinion Poll 2011

Ad Recall: Soap

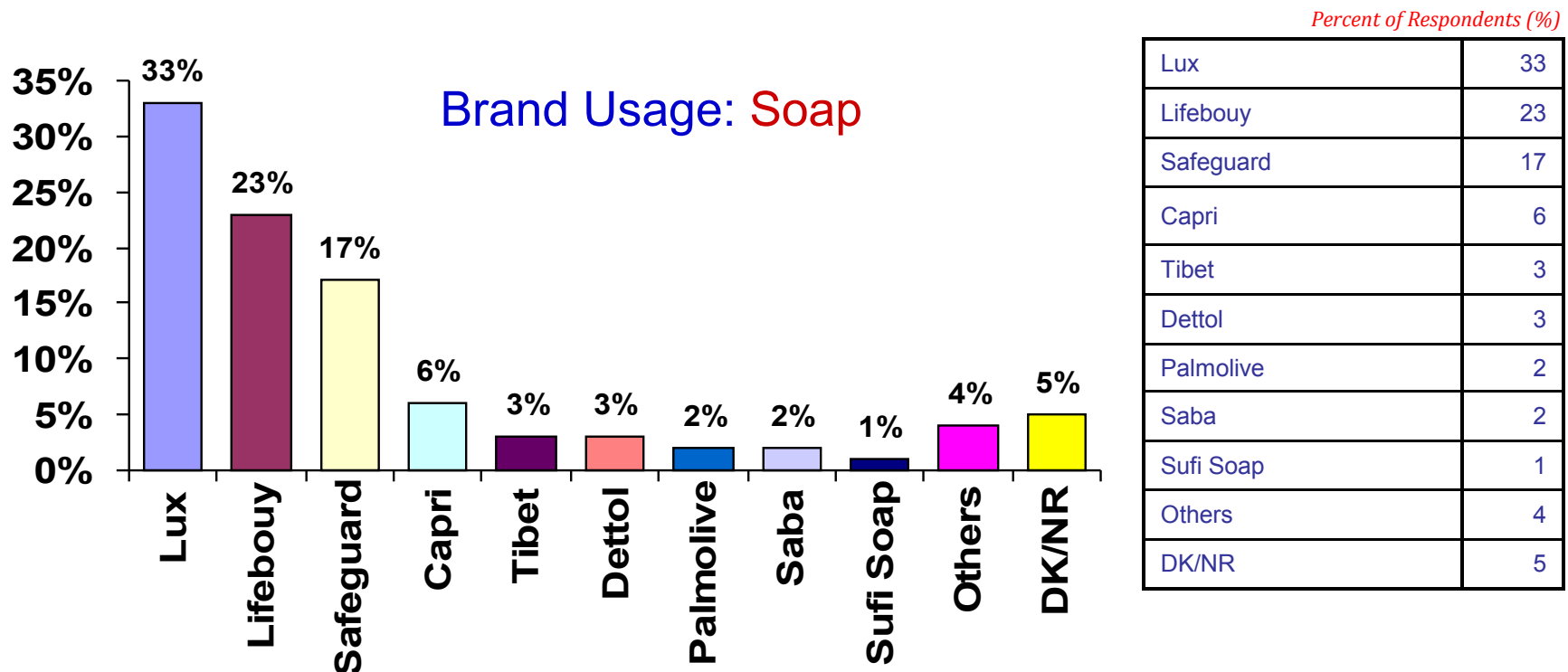
Question: During last week can you recall one 'Soap' advertisement on TV or Newspaper or Billboards that you remember?



Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Soap

Question: Which 'Soap' brand do you use the most?



Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011: **Soap**

- **Brand Recall**

According to 42% of the people questioned, 'Lux' is the first brand that comes to mind when they hear the name 'soap', followed by Lifebouy at 19% and Safeguard at 15% respectively.

- **Ad Recall**

34% percent of respondents said Lux was the one brand whose advertisements they recall seeing on Television/Newspaper/ Billboards. Next in line was Lifebouy at 16% and Safeguard at 10%.

- **Brand Usage**

The survey suggests that the brand Lux is being used the most by 33% of people questioned, seconded by Lifebouy at 23% and Safeguard at 17%.

- **Overall Leader: LUX**

Lux remains the top brand in this category, scoring highest percentage of respondents in all of the three questions asked.



Section 1b

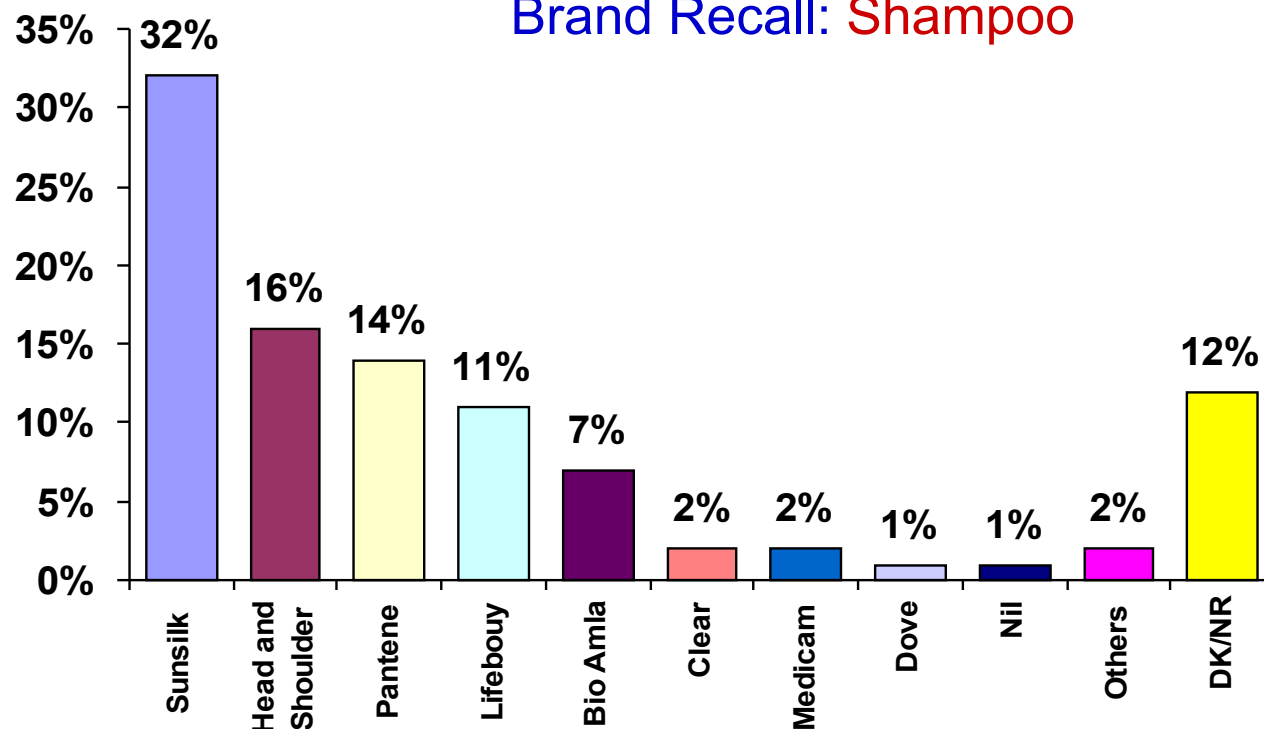
Shampoo



Brand Recall: Shampoo

Question: When you hear the name 'Shampoo' which brand comes to your mind first?

Brand Recall: Shampoo



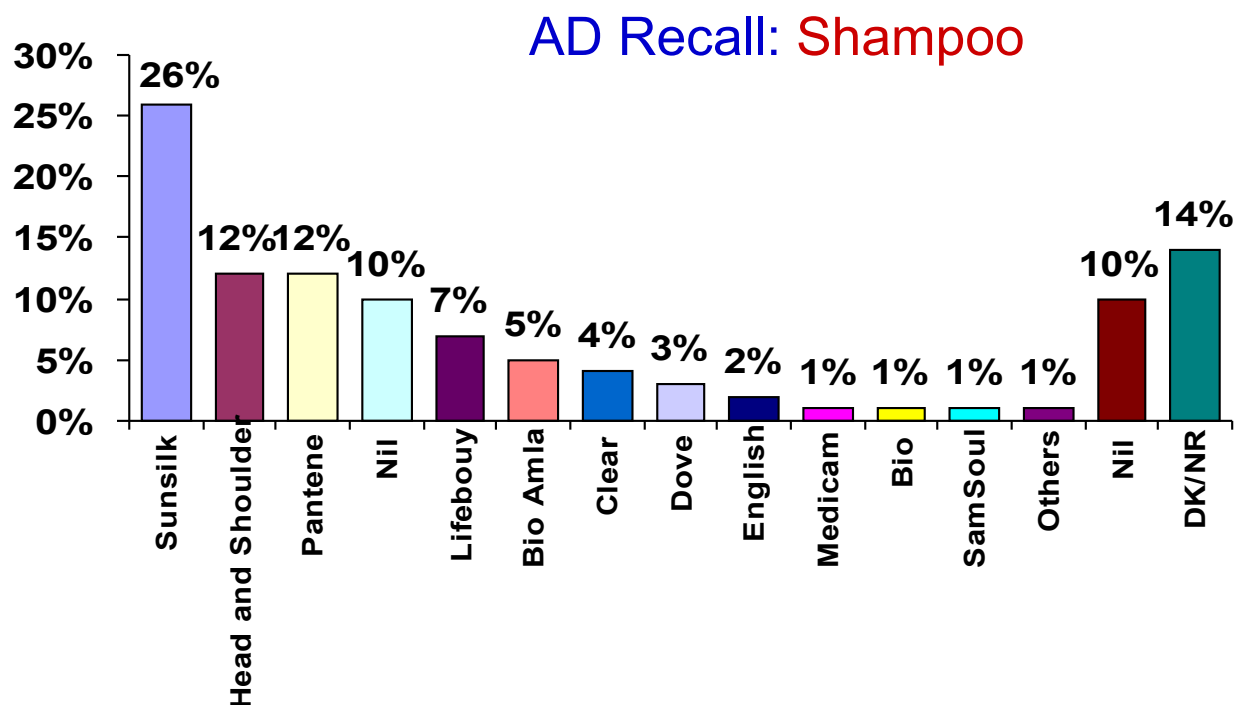
Percent of Respondents (%)

Sunsilk	32
Head and Shoulder	16
Pantene	14
Lifebouy	11
Bio Amla	7
Clear	2
Medicam	2
Dove	1
Nil	1
Others	2
DK/NR	12

Source: Gallup Pakistan National Public Opinion Poll 2011

AD Recall: Shampoo

Question: During last week can you recall one 'Shampoo' advertisement on TV or Newspaper or Billboards that you remember?



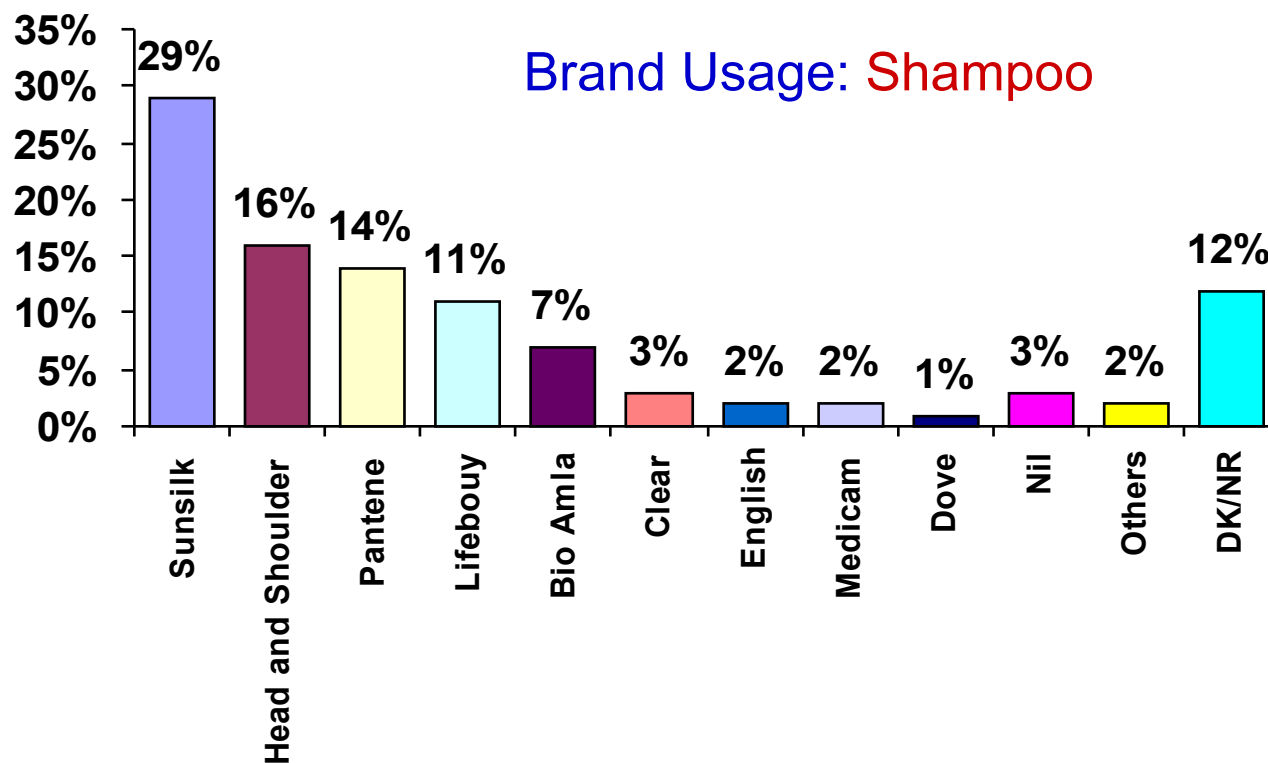
Percent of Respondents (%)

Sunsilk	26
Head and Shoulder	12
Pantene	12
Nil	10
Lifebouy	7
Bio Amla	5
Clear	4
Dove	3
English	2
Medicam	1
Bio	1
SamSoul	1
Others	1
Nil	10
DK/NR	14

Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Shampoo

Question: Which 'Shampoo' brand do you use the most?



Percent of Respondents (%)

Sunsilk	29
Head and Shoulder	16
Pantene	14
Lifebouv	11
Bio Amla	7
Clear	3
English	2
Medicam	2
Dove	1
Nil	3
Others	2
DK/NR	12

Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011: Shampoo

- **Brand Recall**

When the word 'Shampoo' is heard, Sunsilk is the first brand that comes to mind according to 32% of the sample, whereas its Head & Shoulders for the other 16% and Pantene for 14% of the people questioned.

- **Ad Recall**

Sunsilk is reported to have been recalled the most out of all the shampoo advertisements on Television/Newspaper/Billboards at a total of 26% followed by Head & Shoulders and Pantene, both at 12% each.

- **Brand Usage**

29% of respondents said Sunsilk was the one shampoo brand they use the most. Second in line is Head & Shoulders at 16% and Pantene at 14% respectively.

- **Overall Leader: SUNSILK**

Sunsilk has topped the charts for the 'Shampoo' category, with no major competitors.



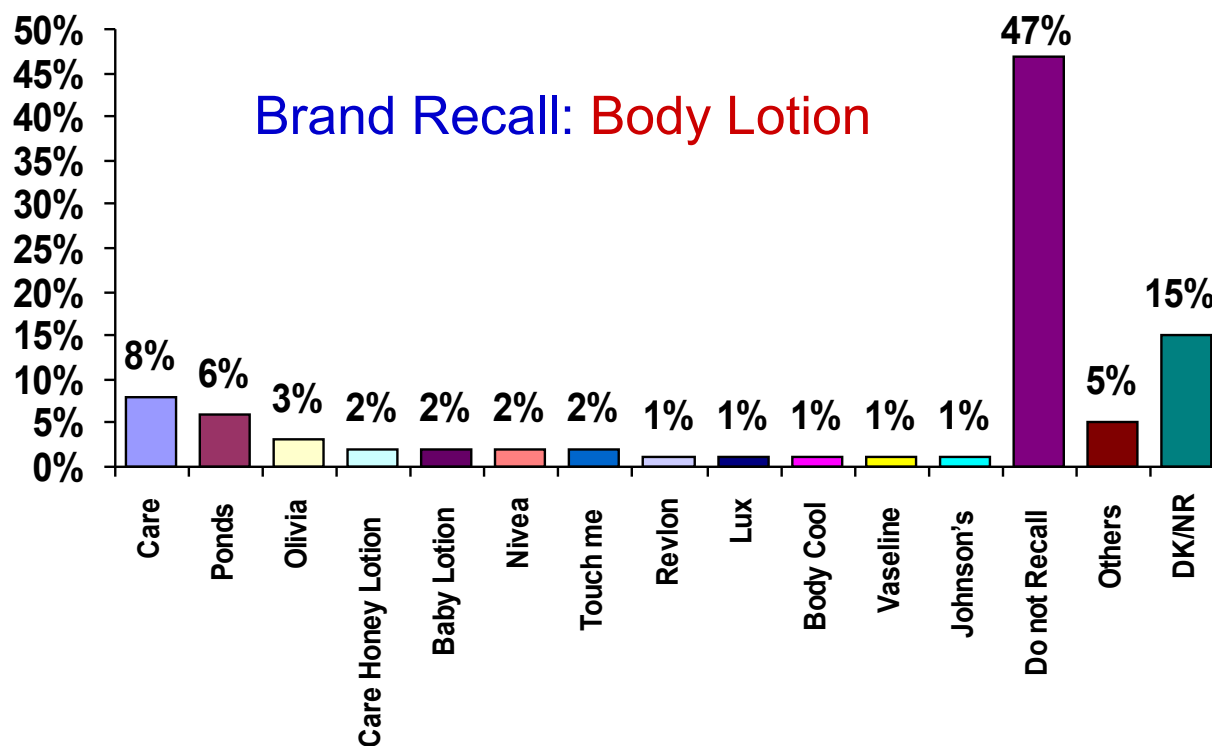
Section 1c

Body Lotion



Brand Recall: Body Lotion

Question: When you listen to the name 'Body Lotion' which brand comes to your mind first?



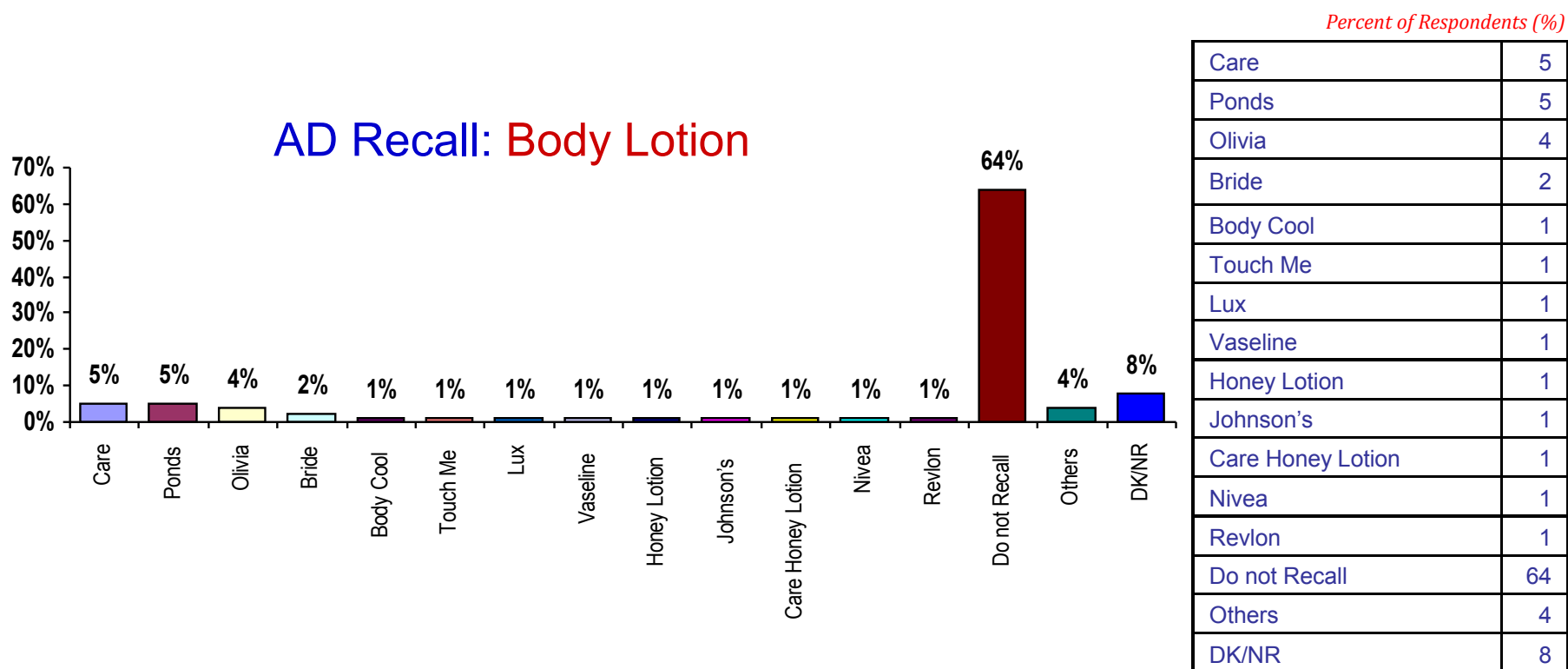
Percent of Respondents (%)

Care	8
Ponds	6
Olivia	3
Care Honey Lotion	2
Baby Lotion	2
Nivea	2
Touch me	2
Revlon	1
Lux	1
Body Cool	1
Vaseline	1
Johnson's	1
Do not Recall	47
Others	5
DK/NR	15

Source: Gallup Pakistan National Public Opinion Poll 2011

AD Recall: Body Lotion

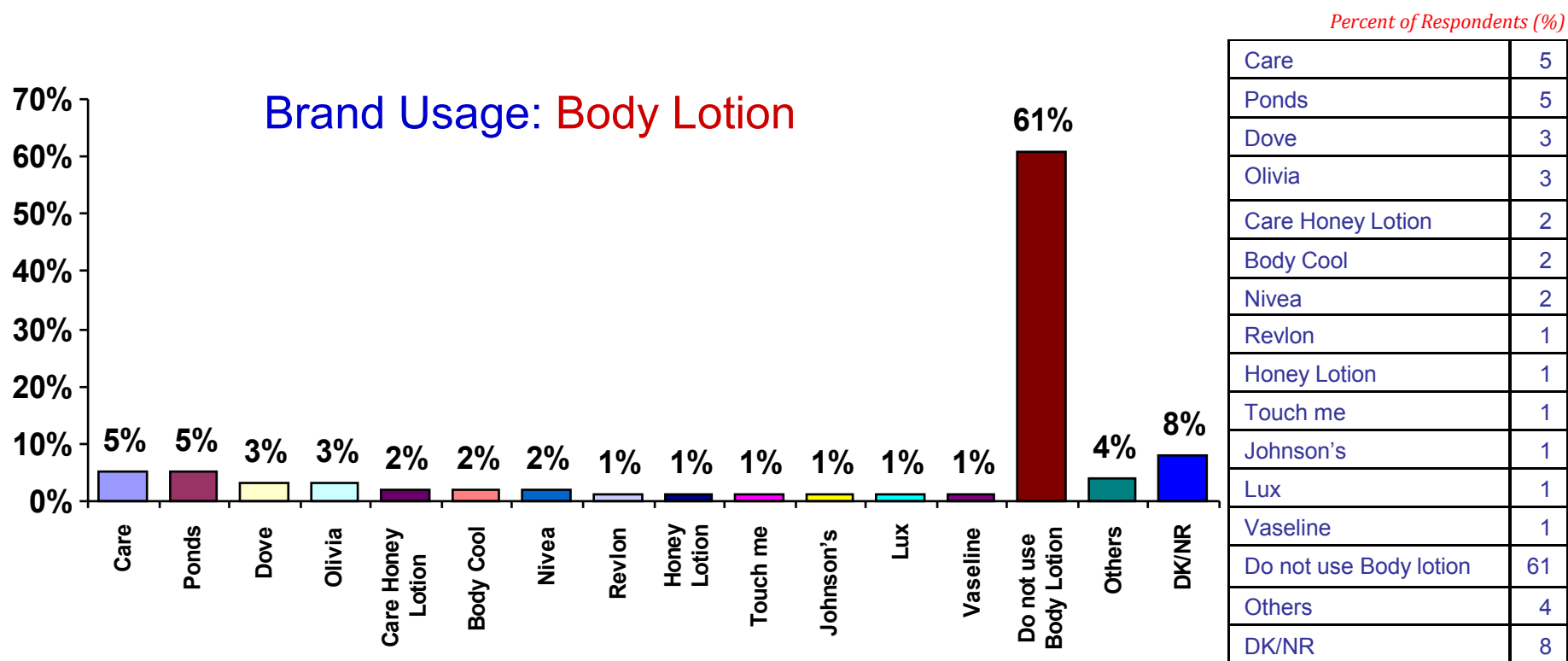
Question: During last week can you recall one 'Body Lotion' advertisement on TV or Newspaper or Billboards that you remember?



Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Body Lotion

Question: Which 'Body Lotion' brand do you use the most?



Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011: **Body Lotion**

- **Brand Recall**

8% of the sample population said Care was the first brand they thought of when hearing the word 'Body Lotion', whereas a total of 6% percent thought of Ponds.

- **Ad Recall**

Advertisements of Care and Ponds were recalled most by the respondents at 5% each followed by Olivia at 4%.

- **Brand Usage**

According to the survey, Care and Ponds is used most by 5% of the sample population each. Dove and Olivia stand second at 3% each.

- **Overall Leader: Care**

Even though most of the people surveyed thought of Care first, it shares first place with Ponds for 'Brand whose Advertisements were recalled the most', as well as 'Most-Commonly used Beauty Product'.

Section 2

Food Items



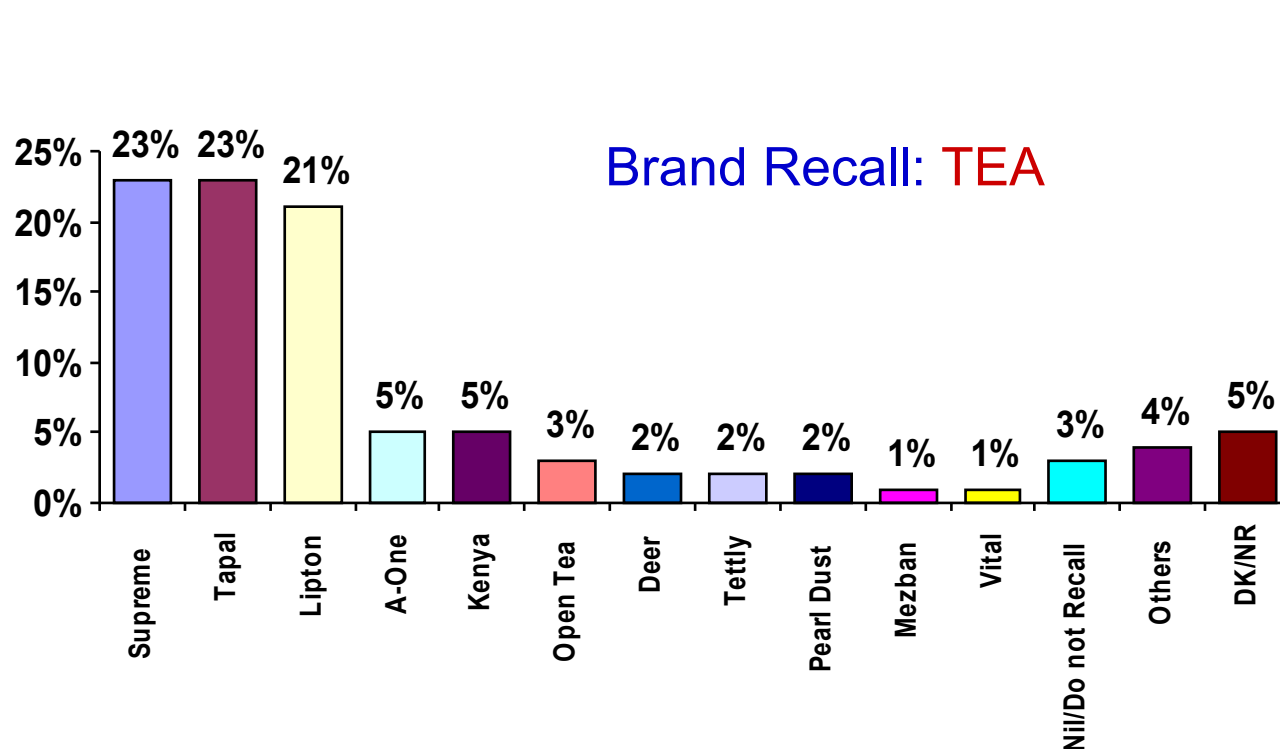
Section 2a

Tea



Brand Recall: Tea

Question: When you listen to the name 'Tea' which brand comes to your mind first?



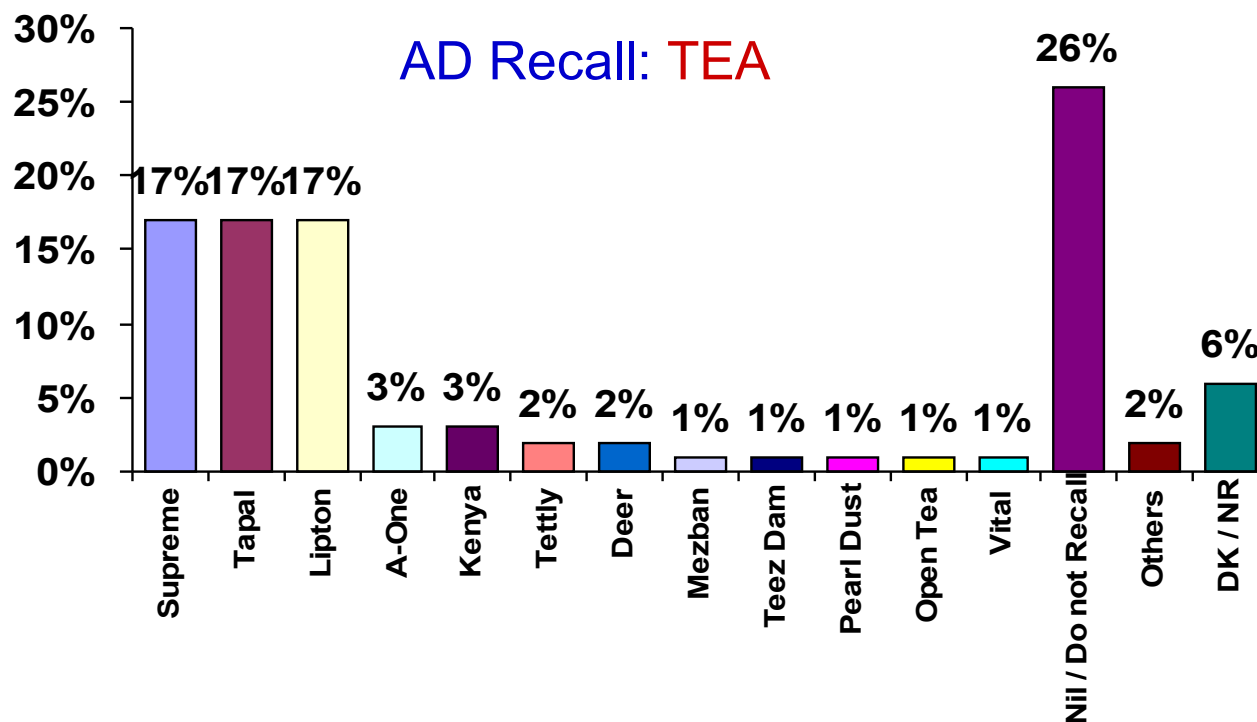
Percent of Respondents (%)

Supreme	23
Tapal	23
Lipton	21
A-One	5
Kenya	5
Open Tea	3
Deer	2
Tettly	
Pearl Dust	2
Mezban	1
Vital	1
Nil / Do not Recall	3
Others	4
DK/NR	5

Source: Gallup Pakistan National Public Opinion Poll 2011

AD Recall: Tea

Question: During last week can you recall one 'Tea' advertisement on TV or Newspaper or Billboards that you remember?



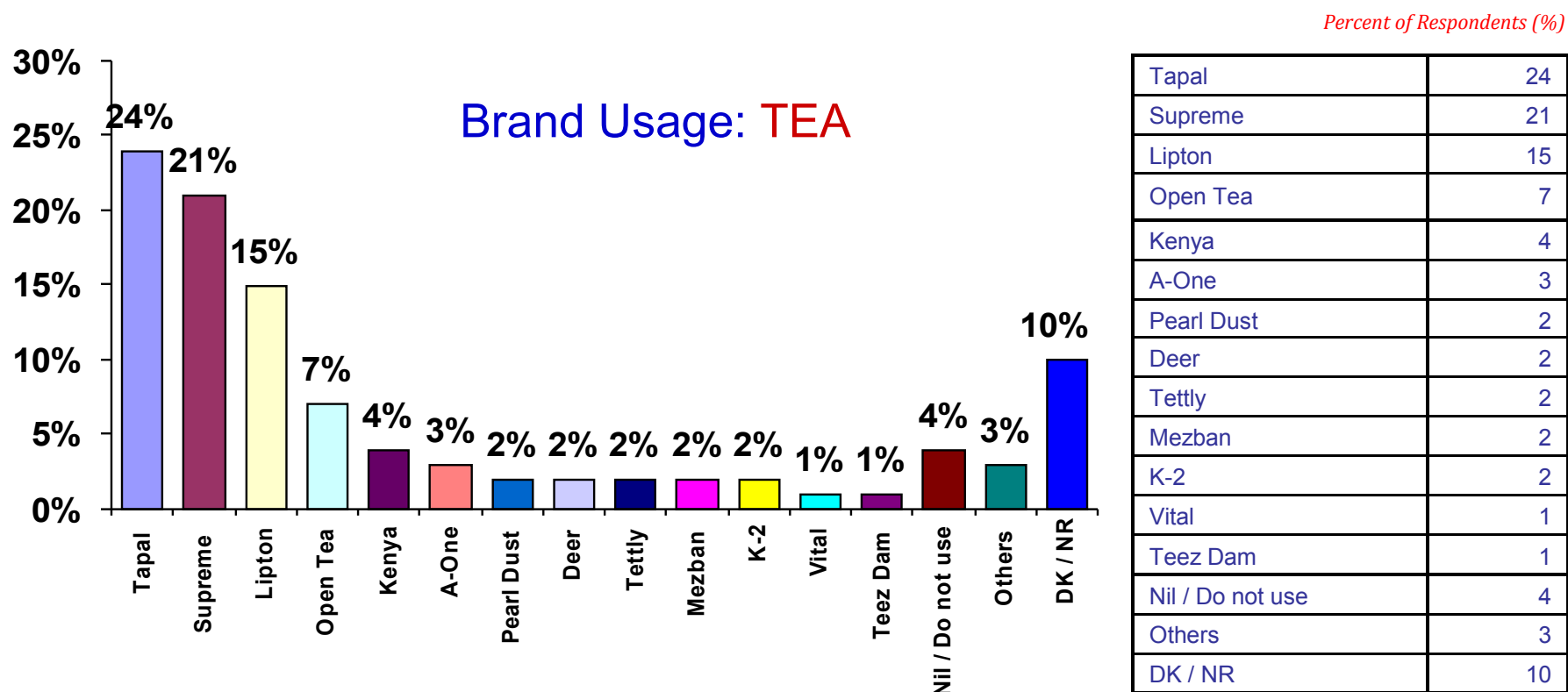
Percent of Respondents (%)

Supreme	17
Tapal	17
Lipton	17
A-One	3
Kenya	3
Tettly	2
Deer	2
Mezban	1
Teez Dam	1
Pearl Dust	1
Open Tea	1
Vital	1
Nil / Do not Recall	26
Others	2
DK / NR	6

Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Tea

Question: Which 'Tea' brand do you use the most?



Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011: Tea

- **Brand Recall**

Supreme and Tapal were the top-most thought of brands, at 23% each with Lipton at a total of 21%.

- **Ad Recall**

Respondents were able to recall advertisements for three brands the most, namely Supreme, Tapal and Lipton, all three of which were 17% each.

- **Brand Usage**

Tapal is being used by 24% of the people questioned, followed by Supreme (21%) and Lipton (15%)

- **Overall Leader: Tapal**

Tapal was the top brand for this category, though sharing first place with Supreme for 'brand that was recalled the most', and with Supreme as well as Lipton for 'brand whose advertisements were recalled the most'.

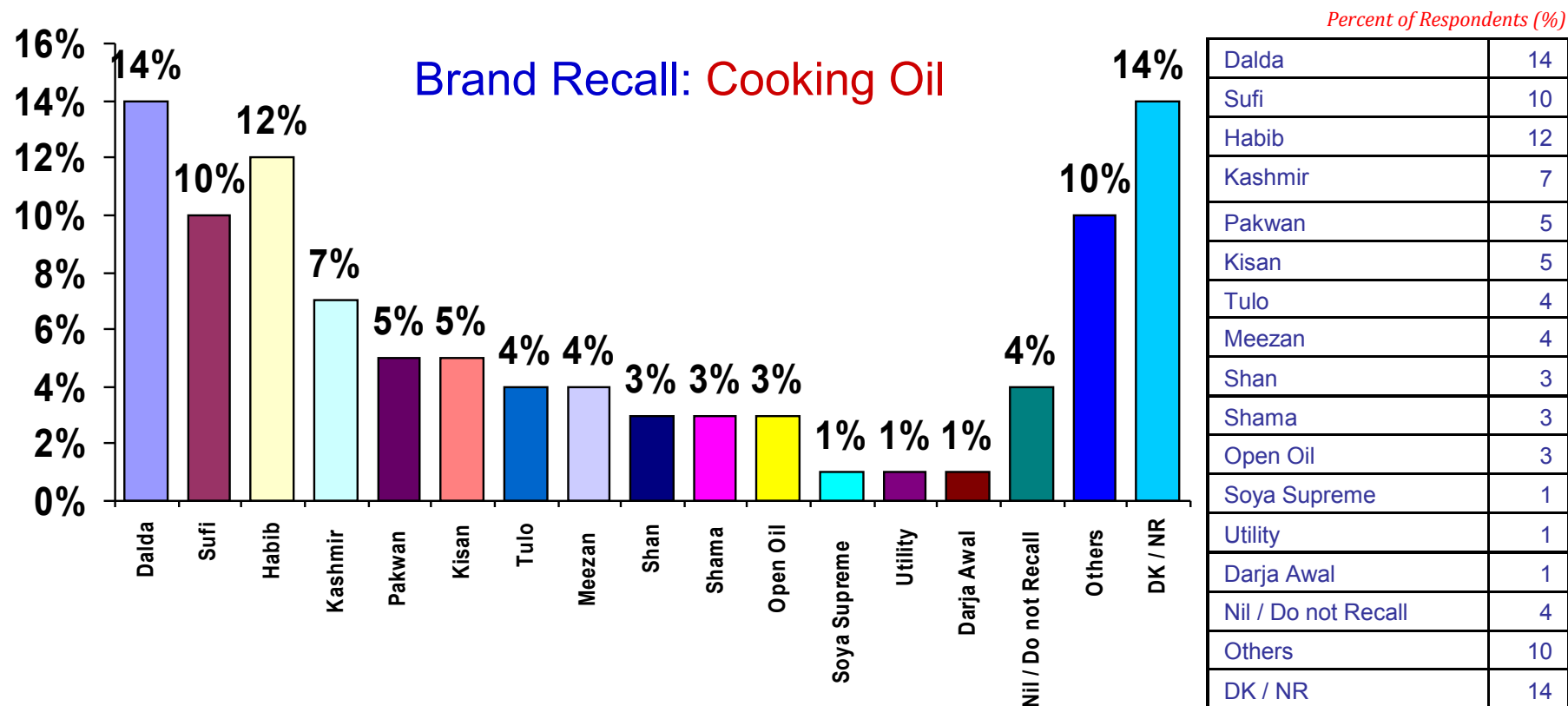
Section 2b

Cooking Oil



Brand Recall: Cooking Oil

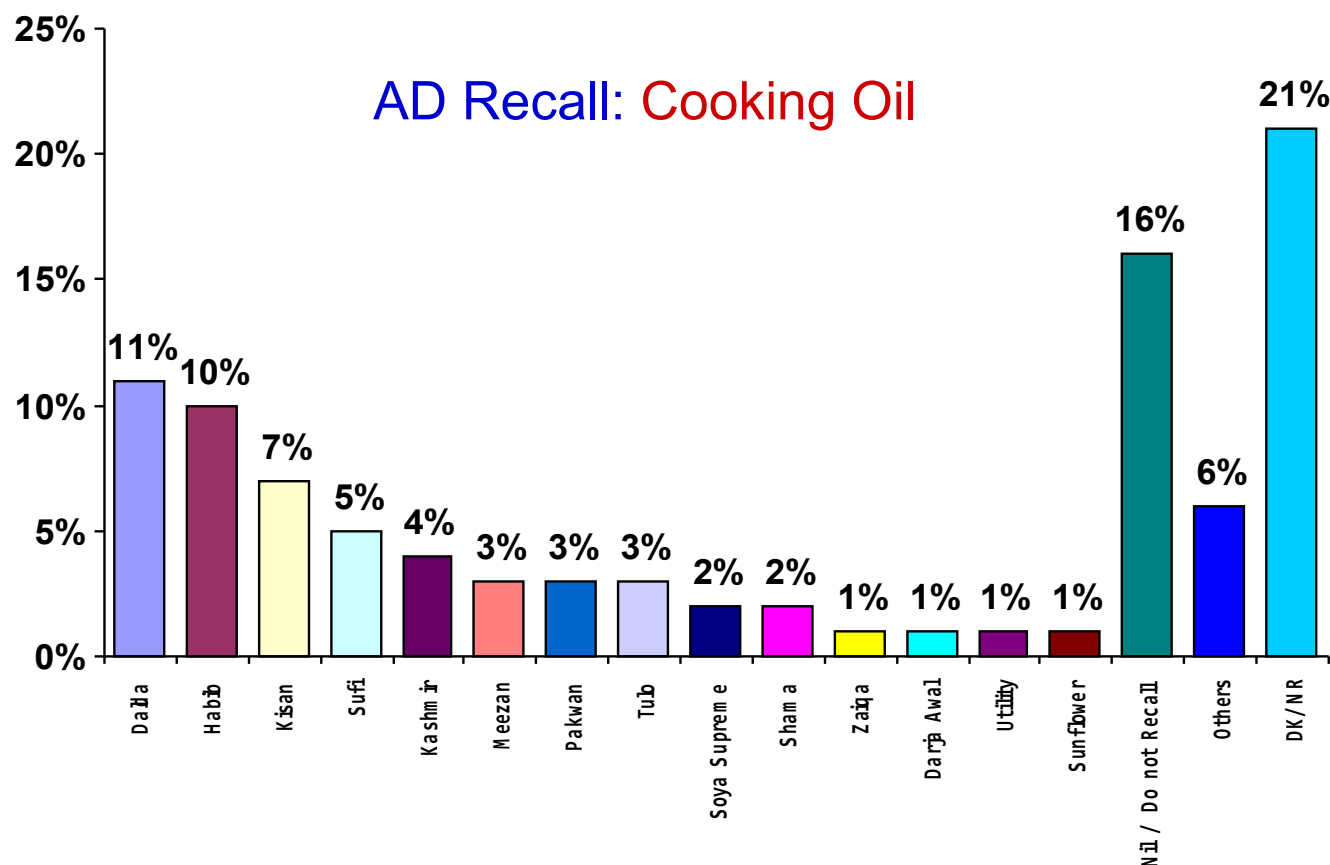
Question: When you listen to the name 'Cooking Oil' which brand comes to your mind first?



Source: Gallup Pakistan National Public Opinion Poll 2011

AD Recall: Cooking Oil

Question: During last week can you recall one 'Cooking Oil' advertisement on TV or Newspaper or Billboards that you remember?



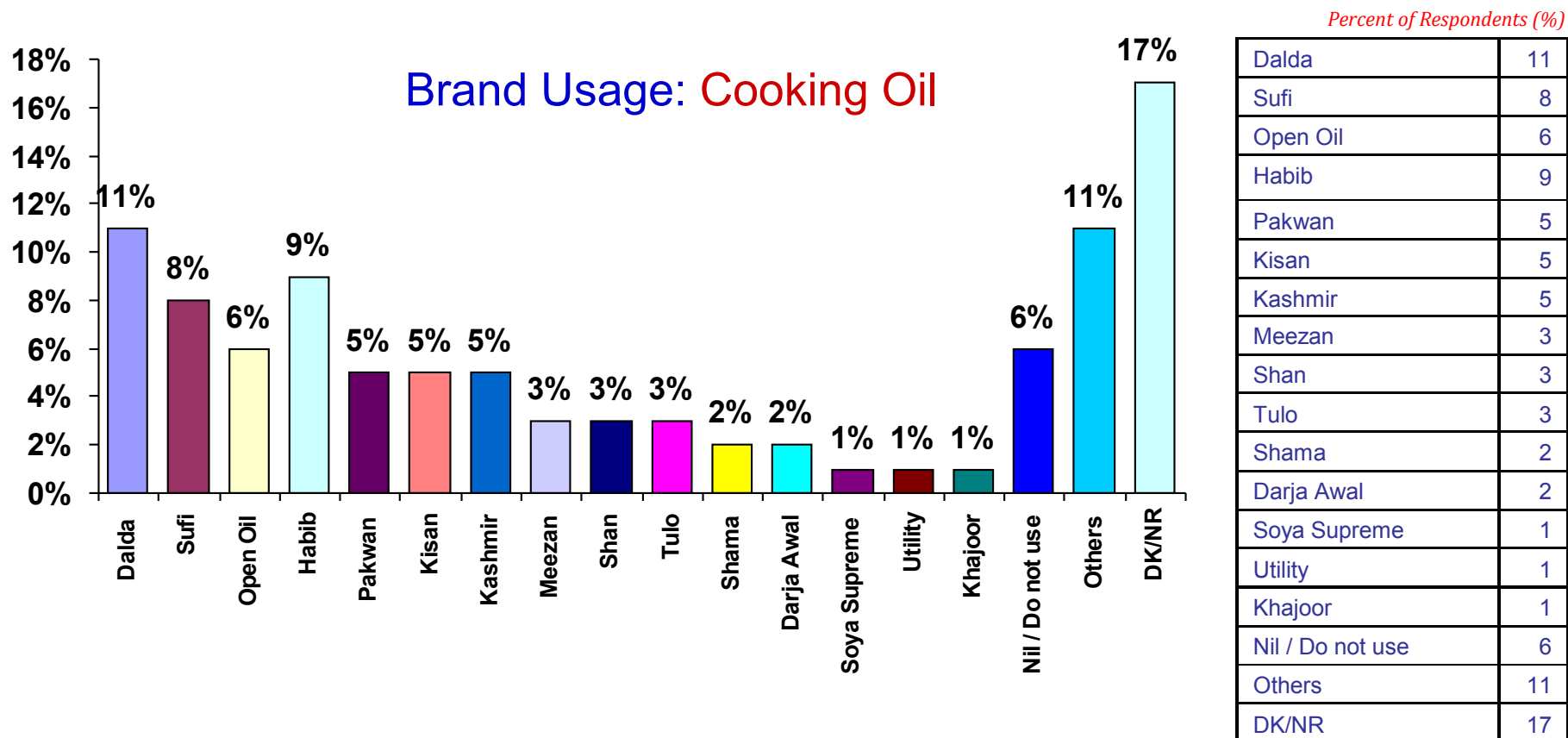
Percent of Respondents (%)

Dalda	11
Habib	10
Kisan	7
Sufi	5
Kashmir	4
Meezan	3
Pakwan	3
Tulo	3
Soya Supreme	2
Shama	2
Zaiqa	1
Darja Awal	1
Utility	1
Sunflower	1
Nil / Do not Recall	16
Others	6
DK / NR	21

Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Cooking Oil

Question: Which 'Cooking Oil' brand do you use the most?



Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011: **Cooking Oil**

- **Brand Recall**

While discussing Cooking Oil brands, it is reported that 14% people thought of Dalda first with Habib at 12% and Sufi at 10% respectively.

- **Ad Recall**

11% of the population questioned managed to recall Dalda's advertisements first. Next in line were those of Habib (10%) and Kisan (7%).

- **Brand Usage**

11% of the people use Dalda the most, followed by Habib (9%) and Sufi (8%).

- **Overall Leader: Dalda**

Dalda remains on the top for this category.



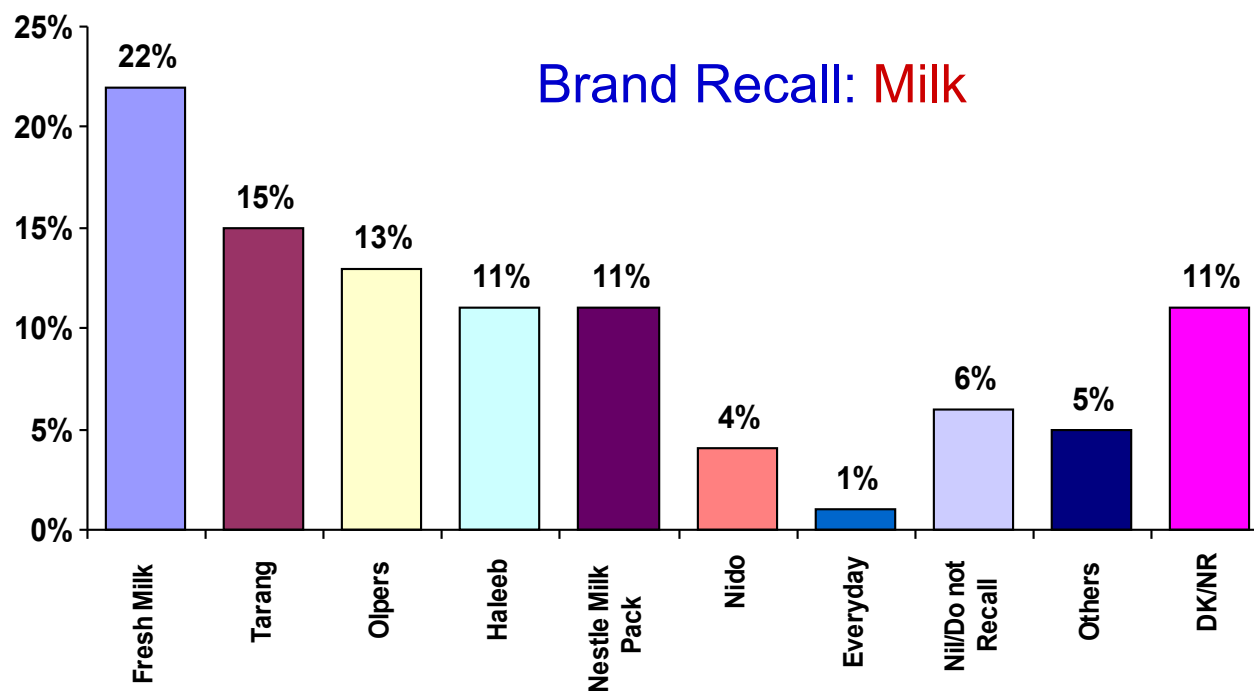
Section 2c

Milk



Brand Recall: Milk

Question: When you listen to the name 'Milk' which brand comes to your mind first?



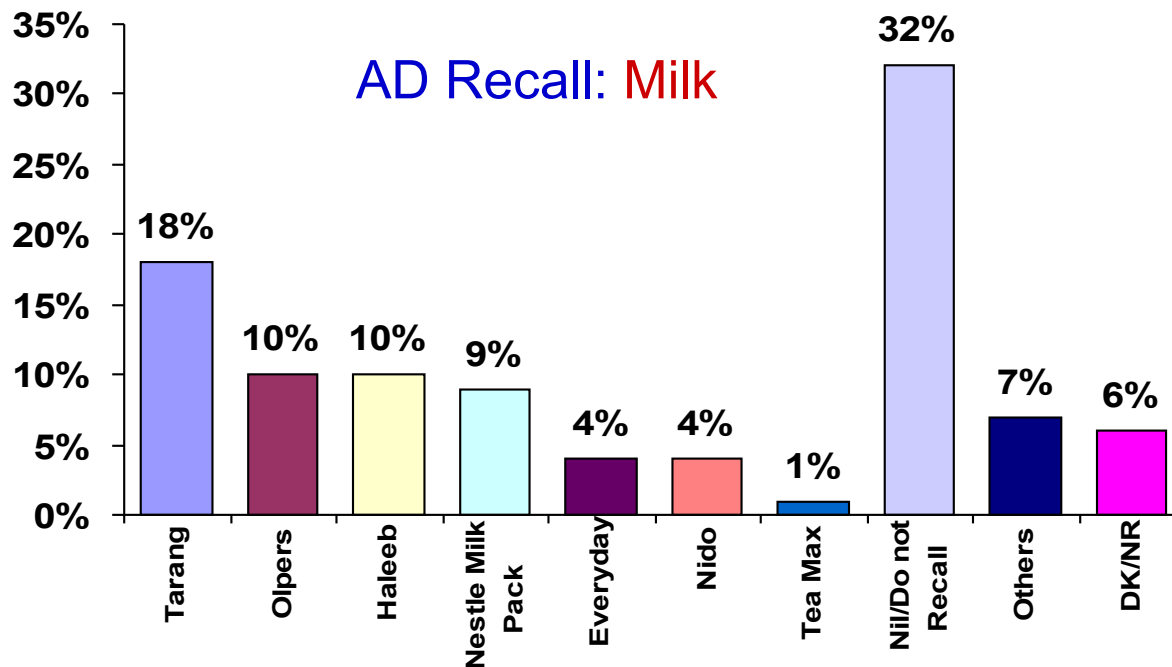
Percent of Respondents (%)

Fresh Milk	22
Tarang	15
Olpers	13
Haleeb	11
Nestle Milk Pack	11
Nido	4
Everyday	1
Nil / Do not Recall	6
Others	5
DK/NR	11

Source: Gallup Pakistan National Public Opinion Poll 2011

AD Recall: Milk

Question: During last week can you recall one 'Milk' advertisement on TV or Newspaper or Billboards that you remember?



Percent of Respondents (%)

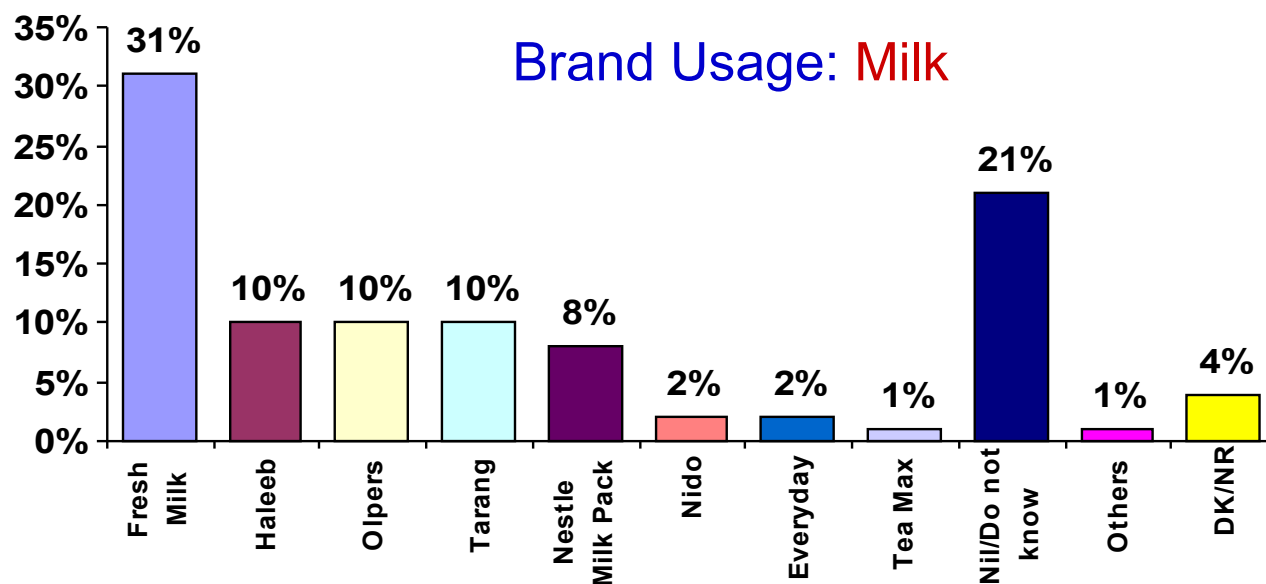
Tarang	18
Olpers	10
Haleeb	10
Nestle Milk Pack	9
Everyday	4
Nido	4
Tea Max	1
Nil/Do not Recall	32
Others	7
DK/NR	6

Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Milk

Question: Which 'Milk' brand do you use the most?

Brand Usage: Milk



Percent of Respondents (%)

Fresh Milk	31
Haleeb	10
Olpers	10
Tarang	10
Nestle Milk Pack	8
Nido	2
Everyday	2
Tea Max	1
Nil / Do not know	21
Others	1
DK/NR	4

Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011: **Milk**

- **Brand Recall**

Fresh Milk was thought of by 22% of the respondents followed by 15% for Tarang and 13% for Olpers respectively.

- **Ad Recall**

Advertisements for Tarang were recalled the most, at a percentage of 18, with Olpers and Haleeb both at 10% each.

- **Brand Usage**

Fresh milk is reported to have been used by 31% of the sample population succeeded by three brands at 10% each, namely Haleeb, Olpers and Tarang.

- **Overall Leader: Fresh Milk**

Fresh milk is reported to have been recalled and used the most by the sample population, whereas advertisements for Tarang were recalled the most.



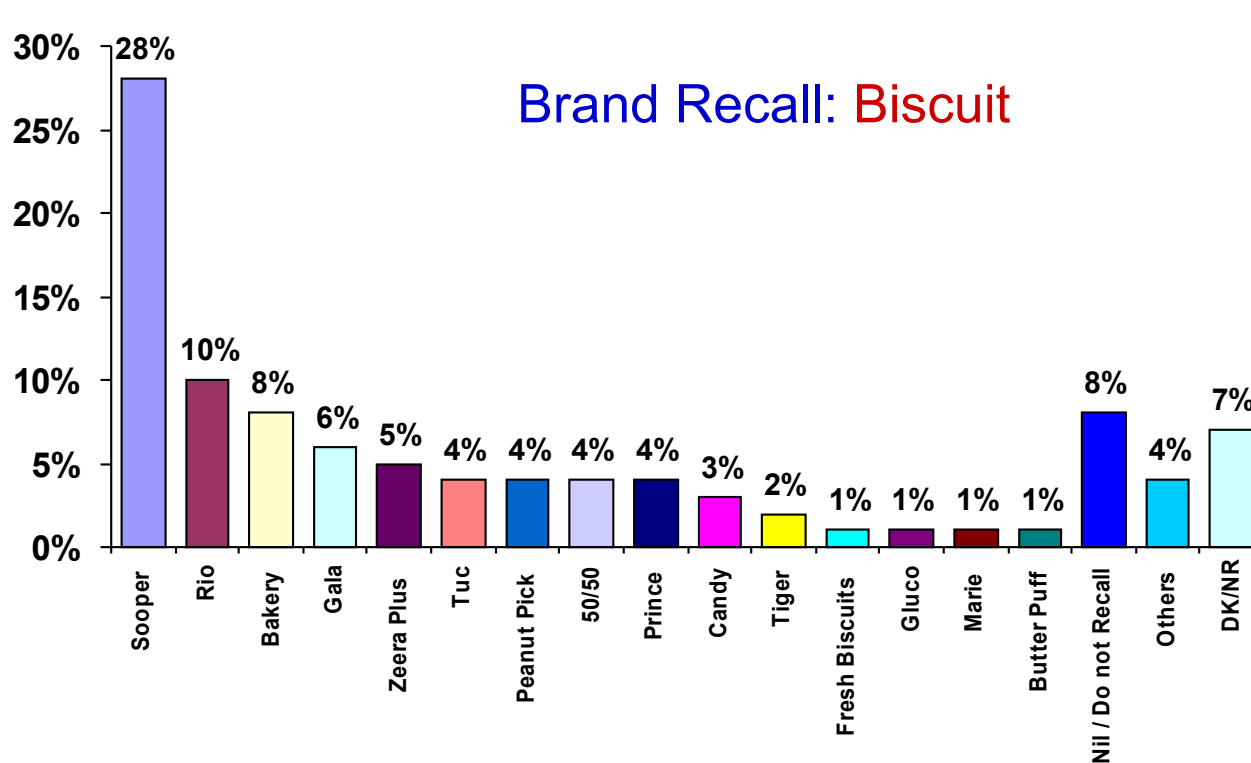
Section 2d

Biscuit



Brand Recall: Biscuit

Question: When you hear the name 'Biscuit' which brand comes to your mind first?



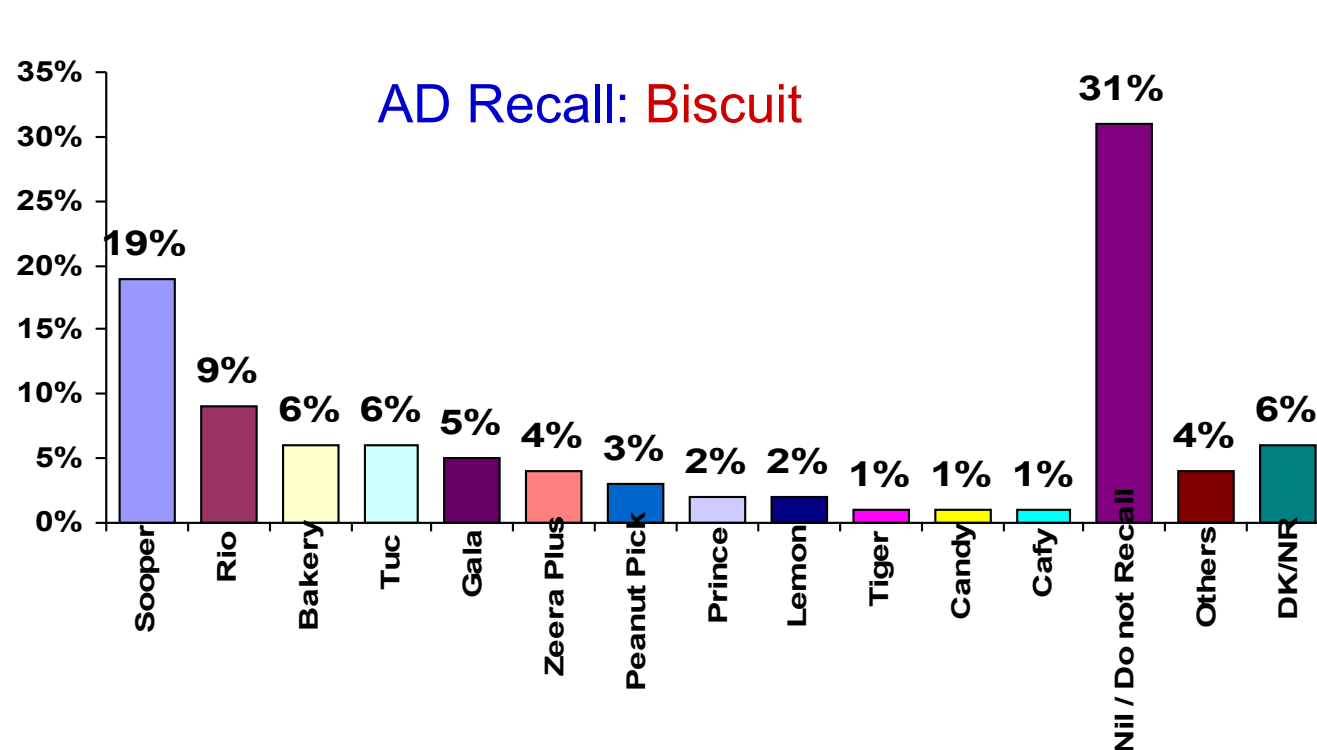
Percent of Respondents (%)

Sooper	28
Rio	10
Bakery	8
Gala	6
Zeera Plus	5
Tuc	4
Peanut Pick	4
50/50	4
Prince	4
Candy	3
Tiger	2
Fresh Biscuits	1
Gluco	1
Marie	1
Butter Puff	1
Nil / Do not Recall	8
Others	4
DK /NR	7

Source: Gallup Pakistan National Public Opinion Poll 2011

AD Recall: Biscuit

Question: During the last week can you name one 'Biscuit' advertisement on TV or Newspaper or Billboards that you remember?



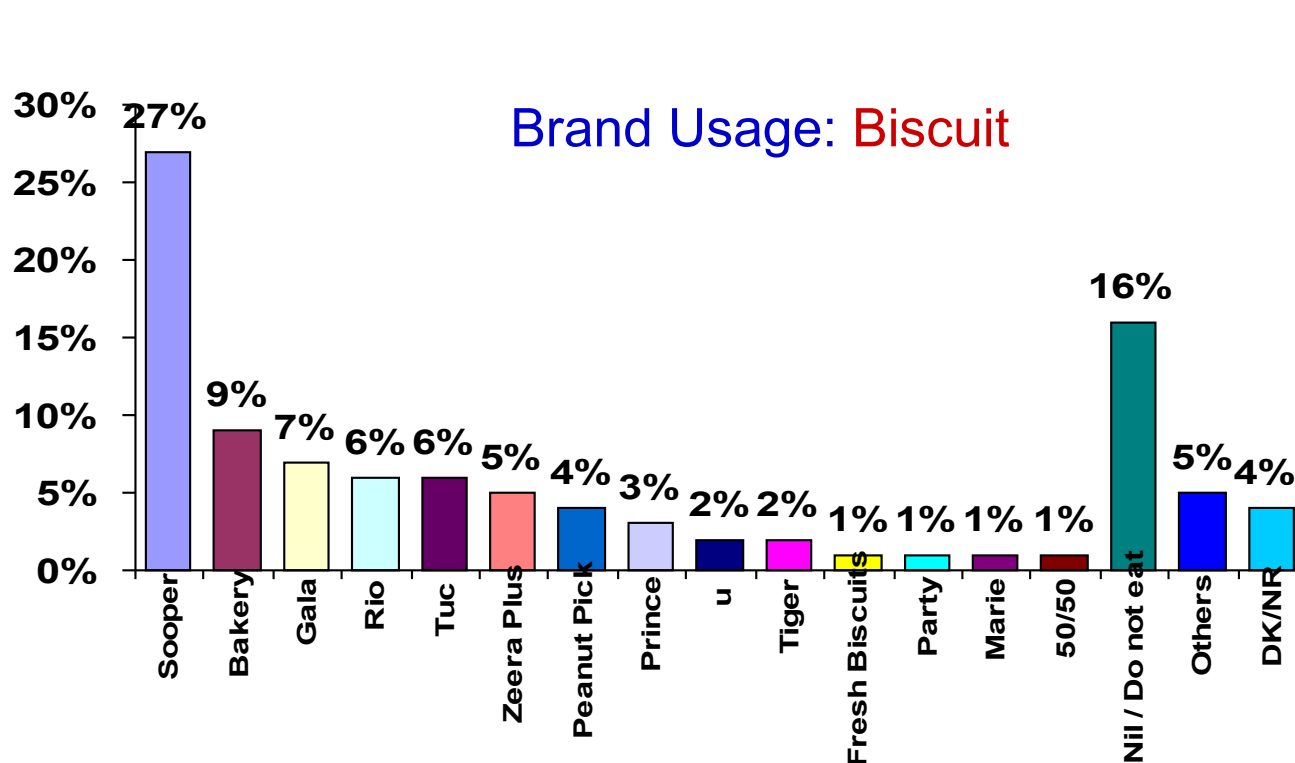
Percent of Respondents (%)

Sooper	19
Rio	9
Bakery	6
Tuc	6
Gala	5
Zeera Plus	4
Peanut Pick	3
Prince	2
Lemon	2
Tiger	1
Candy	1
Cafy	1
Nil / Do not Recall	31
Others	4
DK/NR	6

Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Biscuit

Question: Which 'Biscuit' brand do you use the most?



Percent of Respondents (%)

Sooper	27
Bakery	9
Gala	7
Rio	6
Tuc	6
Zeera Plus	5
Peanut Pick	4
Prince	3
Candy	2
Tiger	2
Fresh Biscuits	1
Party	1
Marie	1
50/50	1
Nil / Do not eat	16
Others	5
DK/NR	4

Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011: **Biscuit**

- **Brand Recall**

When hearing the word 'biscuit', Sooper is the first brand that comes to mind according to 28% of the respondents succeeded by Rio at 10% and Bakery at 8% respectively.

- **Ad Recall**

Sooper advertisements (19%) were recalled the most followed by Rio at 9%, and Bakery and Tuc at 6% each.

- **Brand Usage**

Sooper biscuits (27%) are most commonly consumed, followed by Bakery (9%) and Gala (7%).

- **Overall Leader: Sooper**

Sooper is the one brand that was recalled the most, and used the most by households.



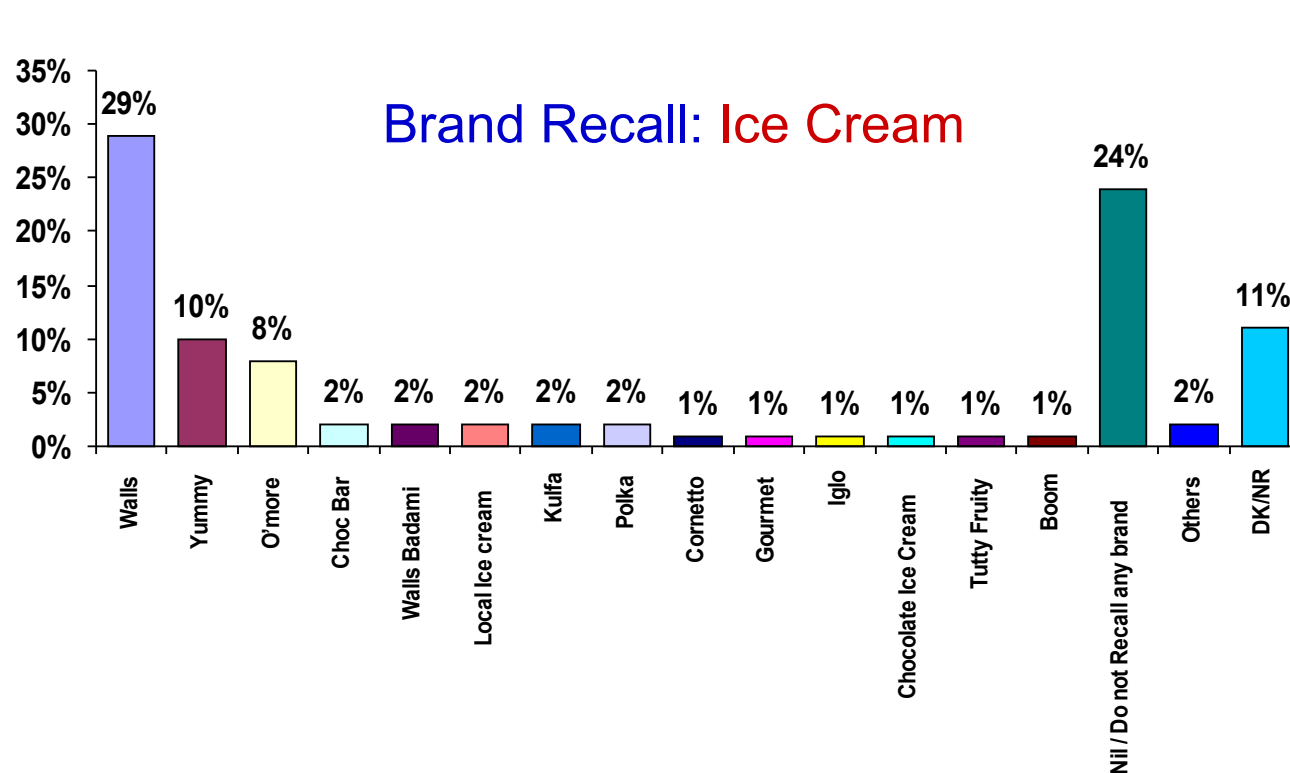
Section 2e

Ice cream



Brand Recall: Ice Cream

Question: When you hear the name 'Ice cream' which brand comes to your mind first?



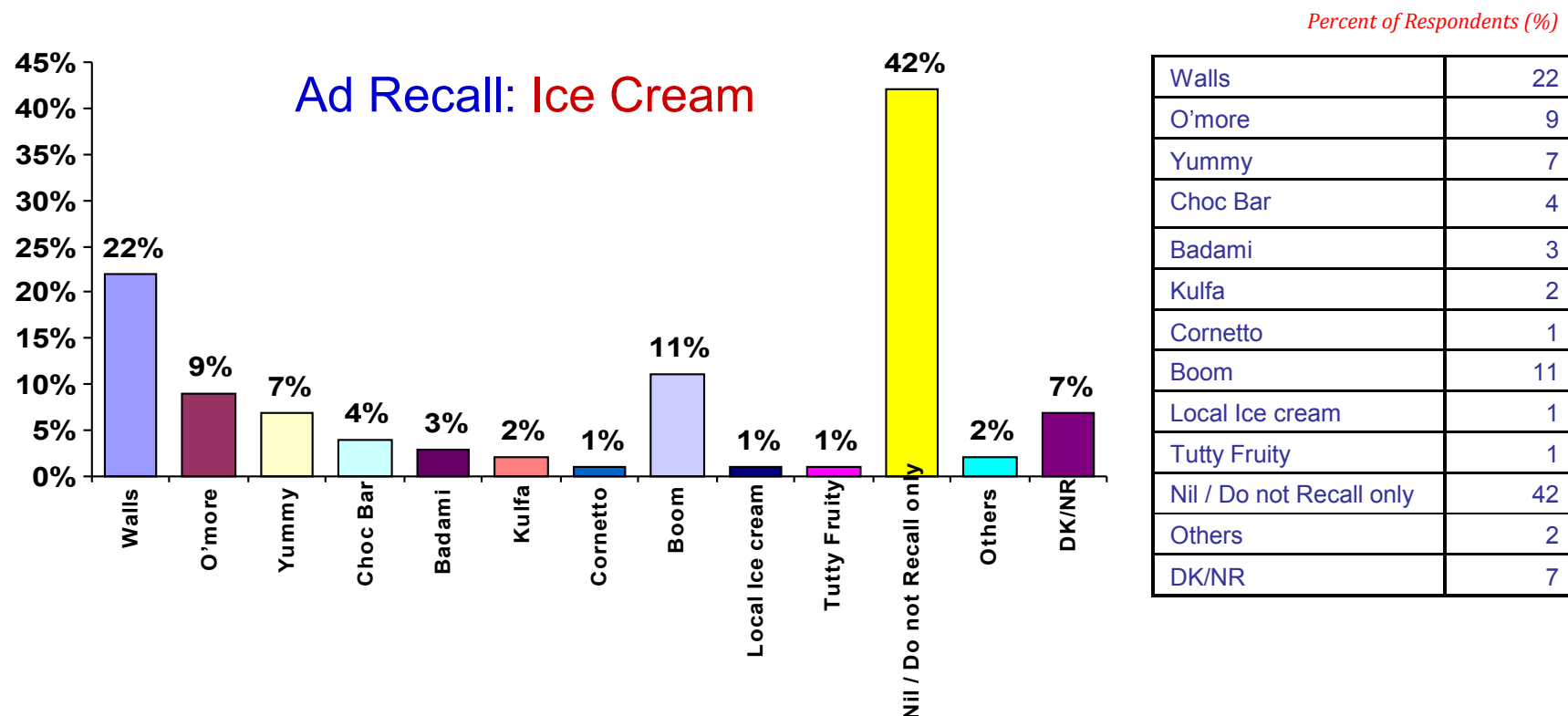
Percent of Respondents (%)

Walls	29
Yummy	10
O'more	8
Choc Bar	2
Walls Badami	2
Local Ice cream	2
Kulfa	2
Polka	2
Cornetto	1
Gourmet	1
Iglo	1
Chocolate Ice Cream	1
Tutty Fruity	1
Boom	1
Nil / Do not Recall any brand	24
Others	2
DK/NR	11

Source: Gallup Pakistan National Public Opinion Poll 2011

Ad Recall: Ice Cream

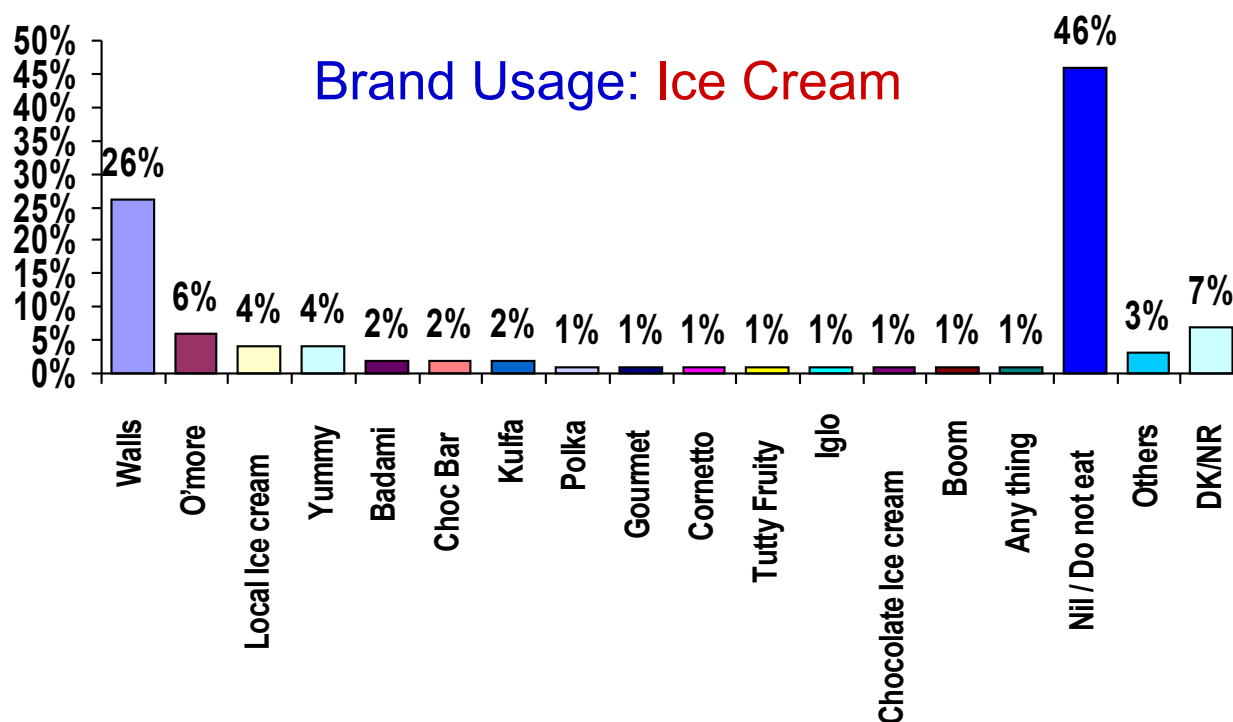
Question: During the last week can you name one 'Ice cream' advertisement on TV or Newspaper or Billboards that you remember?



Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Ice Cream

Question: Which 'Ice cream' brand do you use the most?



Percent of Respondents (%)

Walls	26
O'more	6
Local Ice cream	4
Yummy	4
Badami	2
Choc Bar	2
Kulfa	2
Polka	1
Gourmet	1
Cornetto	1
Tutty Fruity	1
Iglo	1
Chocolate Ice cream	1
Boom	1
Any thing	1
Nil / Do not eat	46
Others	3
DK/NR	7

Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011:

Ice Cream

- **Brand Recall**

Walls ice-cream came to mind first for 29% percent of the people questioned, followed by Yummy (10%) and O'more (8%).

- **Ad Recall**

Walls advertisements were recalled the most according to 22% of the sample population, next in line being O'more at 9% and Yummy at 7% respectively.

- **Brand Usage**

Walls ice-cream comes first yet again, as the most-commonly consumed brand, standing at 26% followed by the local ice-cream (6%).

- **Overall Leader: Walls**

Walls ice-cream tops the brand list for Ice-cream for all three questions pertaining to the category.



Section 3

Home Appliances



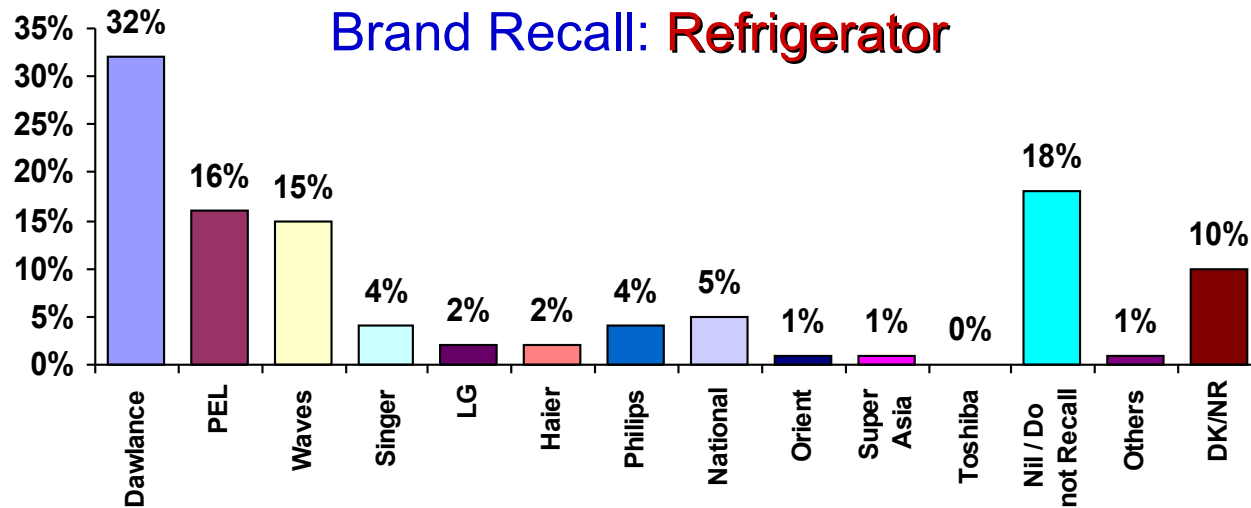
Section 3a

Refrigerator



Brand Recall: Refrigerator

Question: When you hear the name 'Refrigerator' which brand comes to your mind first?



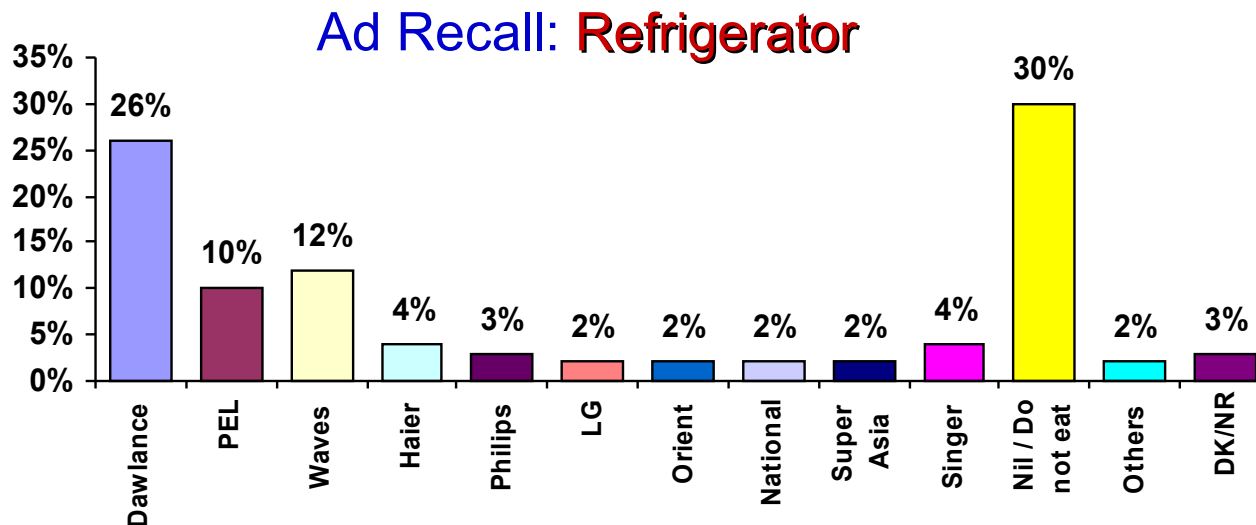
Percent of Respondents (%)

Dawlance	28
PEL	11
Waves	12
Singer	4
LG	2
Haier	4
Philips	3
National	2
Orient	1
Super Asia	1
Toshiba	2
Nil / Do not Recall	18
Others	1
DK/NR	10

Source: Gallup Pakistan National Public Opinion Poll 2011

Ad Recall: Refrigerator

Question: During the last week can you name one 'Refrigerator' advertisement on TV or Newspaper or Billboards that you remember?



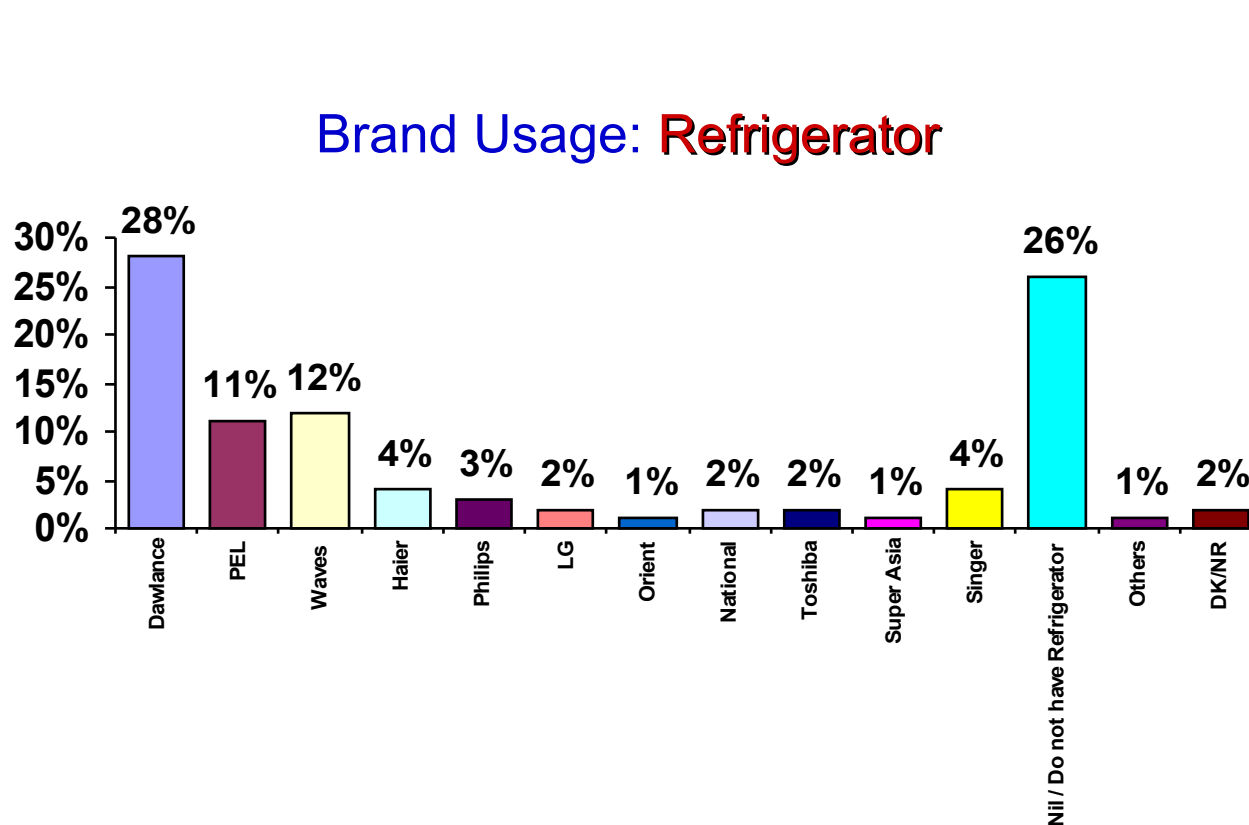
Percent of Respondents (%)

Dawlance	26
PEL	10
Waves	12
Haier	4
Philips	3
LG	2
Orient	2
National	2
Super Asia	2
Singer	4
Nil / Do not eat	30
Others	2
DK/NR	3

Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Refrigerator

Question: Which 'Refrigerator' brand do you use the most?



Percent of Respondents (%)

Dawlance	28
PEL	11
Waves	12
Haier	4
Philips	3
LG	2
Orient	1
National	2
Toshiba	2
Super Asia	1
Singer	4
Nil / Do not have Refrigerator	26
Others	1
DK/NR	2

Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011:

Refrigerator

- **Brand Recall**

When the word refrigerator was brought up, 28% of the people questioned thought of Dawlance whereas 12% thought of Waves followed by PEL at 11%.

- **Ad Recall**

Dawlance's advertisements were most widely recalled, at a total of 26%, second in line being Waves at 12% respectively.

- **Brand Usage**

Further, Dawlance also happens to be the brand most used by the sample population followed by Waves and PEL, at 28%, 12% and 11% each.

- **Overall Leader: Dawlance**

Dawlance has managed to score highest percentages in all three questions asked, with no major competitors.



Section 3b

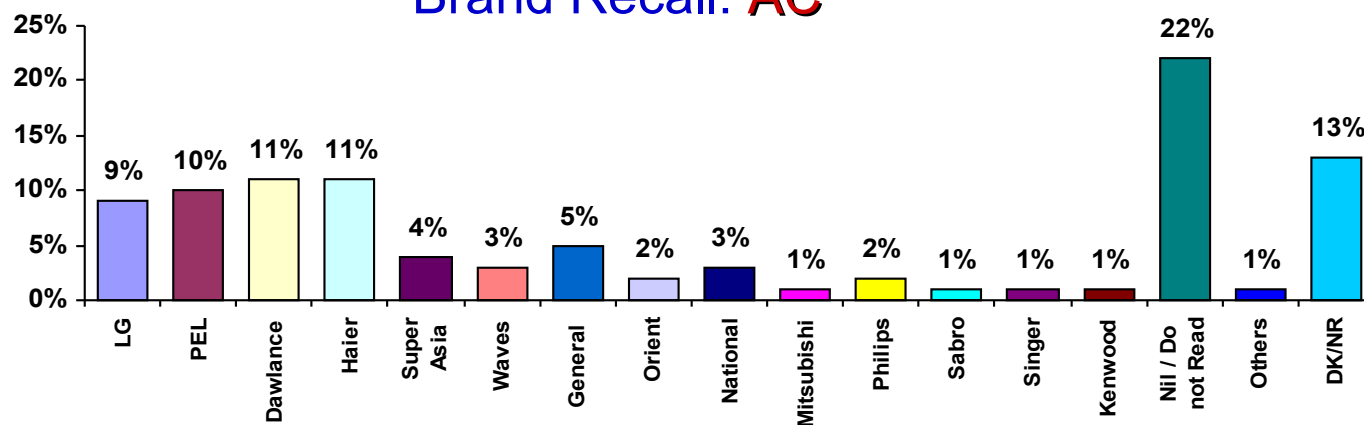
AC



Brand Recall: AC

Question: When you hear the name 'AC' which brand comes to your mind first?

Brand Recall: AC



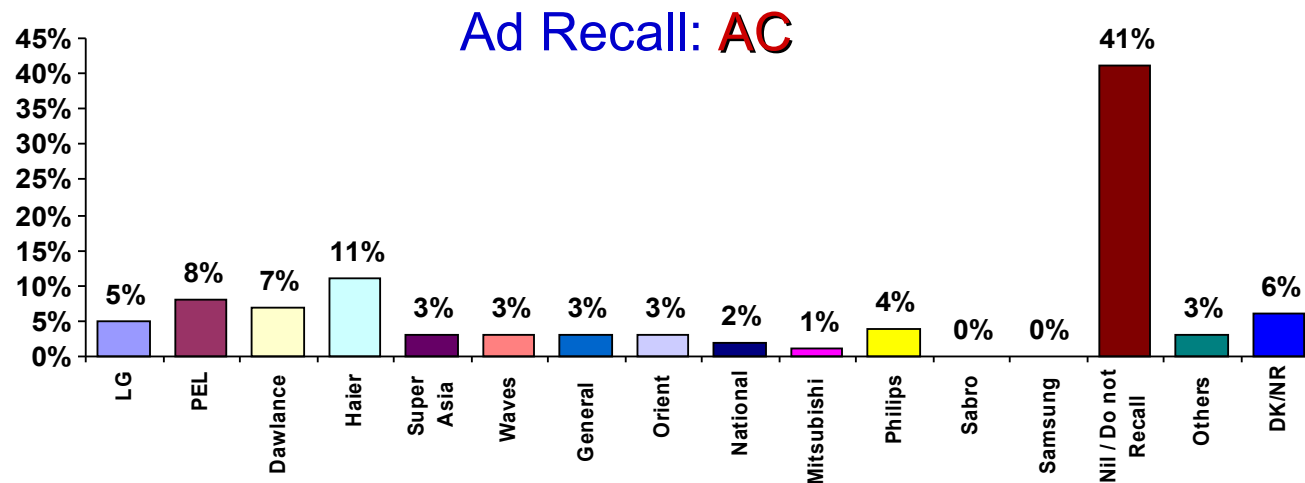
Percent of Respondents (%)

LG	9
PEL	10
Dawlance	11
Haier	11
Super Asia	4
Waves	3
General	5
Orient	2
National	3
Mitsubishi	1
Philips	2
Sabro	1
Singer	1
Kenwood	1
Nil / Do not Read	22
Others	1
DK/NR	13

Source: Gallup Pakistan National Public Opinion Poll 2011

Ad Recall: AC

Question: During the last week can you name one 'AC' advertisement on TV or Newspaper or Billboards that you remember?



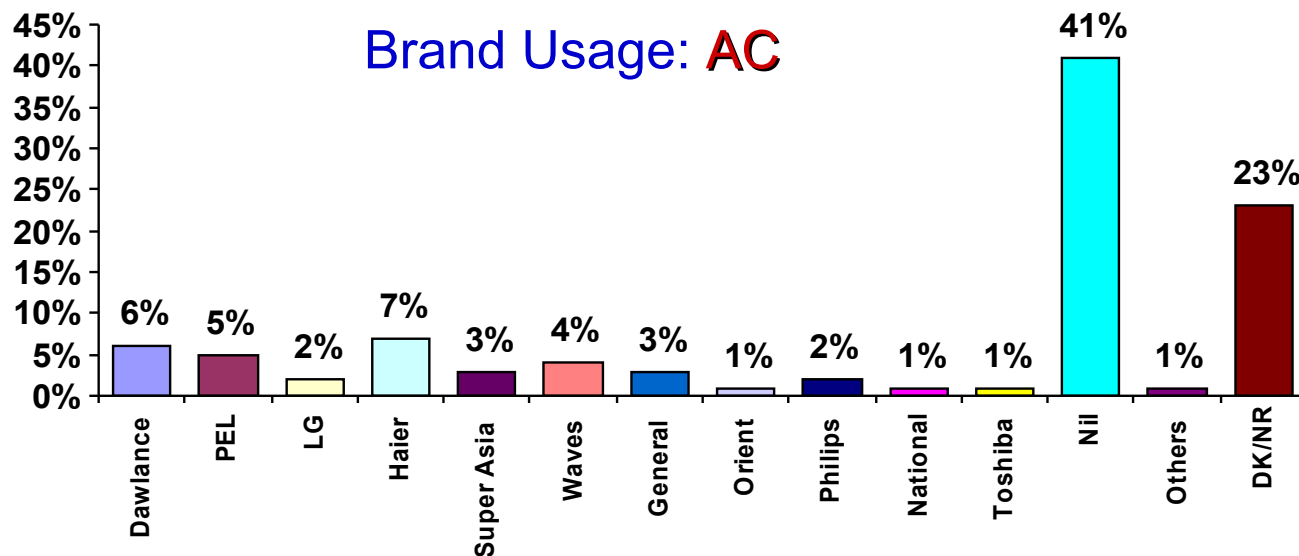
Percent of Respondents (%)

LG	5
PEL	8
Dawlance	7
Haier	11
Super Asia	3
Waves	3
General	3
Orient	3
National	2
Mitsubishi	1
Philips	4
Sabro	0
Samsung	0
Nil / Do not Recall	41
Others	3
DK/NR	6

Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: AC

Question: Which 'AC' brand do you use the most?



Percent of Respondents (%)

Dawlance	6
PEL	5
LG	2
Haier	7
Super Asia	3
Waves	4
General	3
Orient	1
Philips	2
National	1
Toshiba	1
Nil	41
Others	1
DK/NR	23

Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011: **AC**

- **Brand Recall**

When the word AC was heard, 11% of people surveyed thought of Dawlance and Haier each, where 10% thought of PEL and 9% of LG.

- **Ad Recall**

11% of respondents recalled seeing adverts of Haier the most, whereas it was 8% for PEL and 7% for Dawlance.

- **Brand Usage**

Haier is the most-commonly used Air Conditioner amongst 7% of the sample population, with Dawlance (6%) holding second place.

- **Overall Leader: Dawlance and Haier**

Dawlance and Haier were the top two brands that were thought of the most, and used the most, however people managed to recall advertisements of Haier more.



Section 3c

Washing Machine

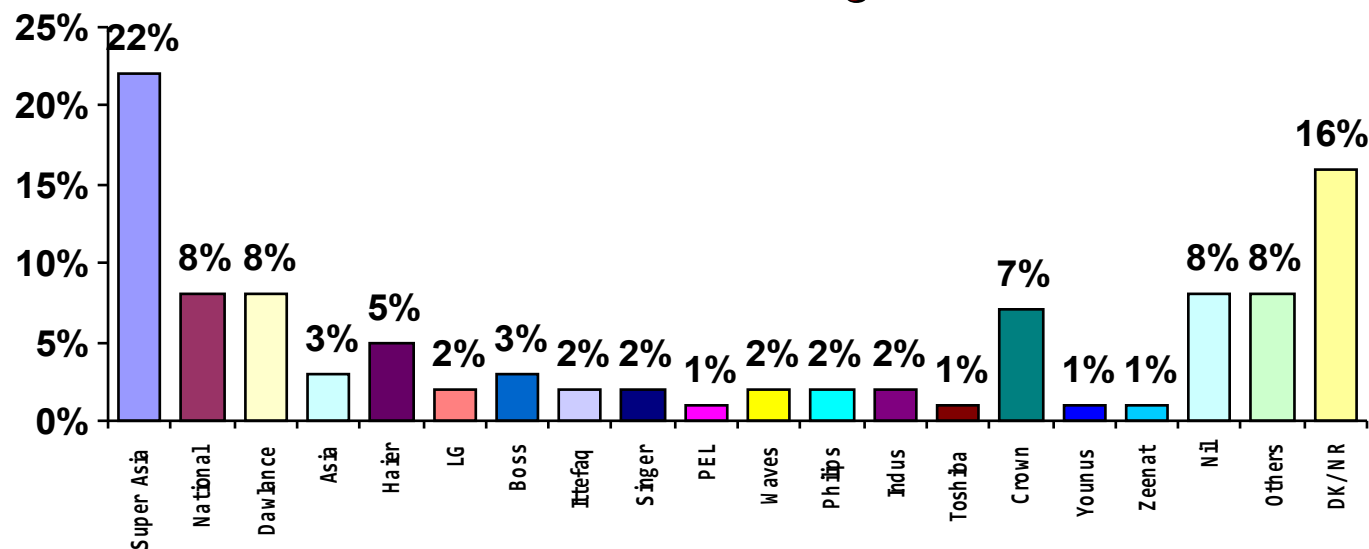


Brand Recall: Washing Machine

Question: When you hear the name 'Washing Machine' which brand comes to your mind first?

Percent of Respondents (%)

Brand Recall: Washing Machine

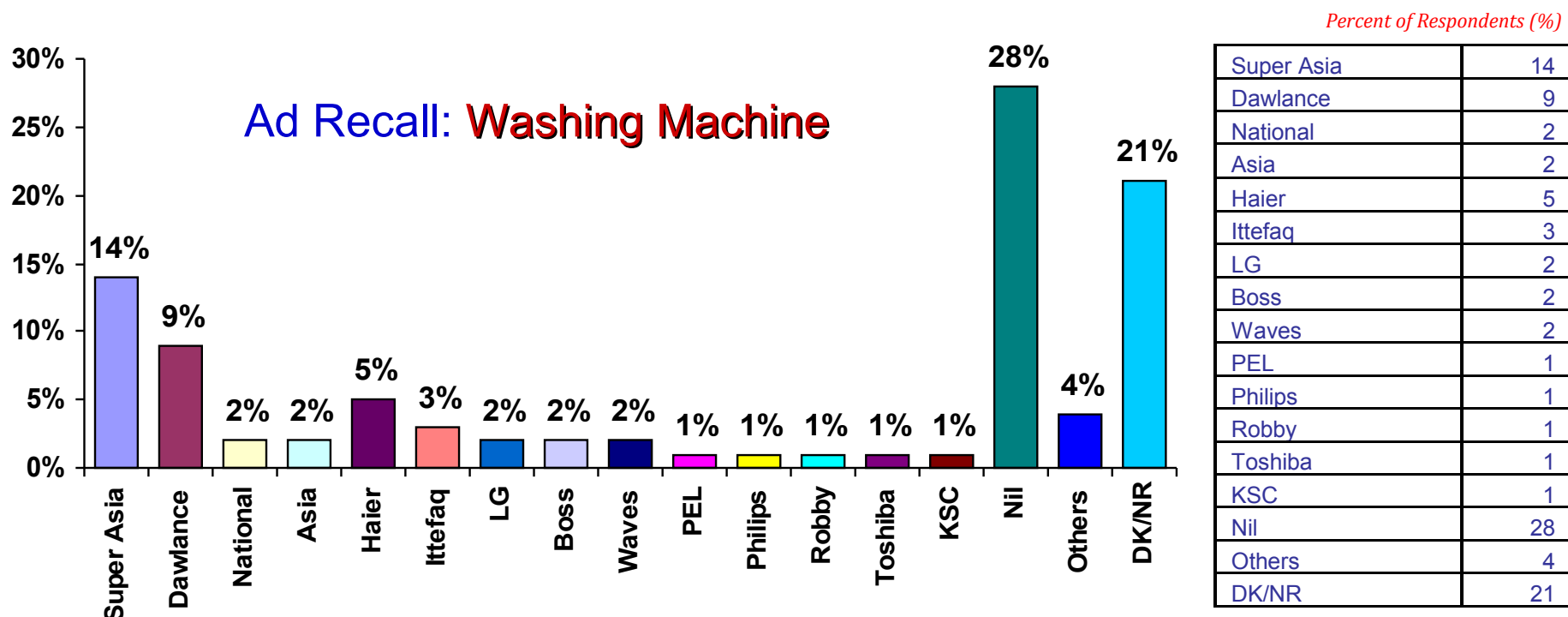


Super Asia	22
National	8
Dawlance	8
Asia	3
Haier	5
LG	2
Boss	3
Ittefaq	2
Singer	2
PEL	1
Waves	2
Philips	2
Indus	2
Toshiba	1
Crown	7
Younus	1
Zeenat	1
Nil	8
Others	8
DK/NR	16

Source: Gallup Pakistan National Public Opinion Poll 2011

Ad Recall: Washing Machine

Question: During the last week can you name one 'Washing Machine' advertisement on TV or Newspaper or Billboards that you remember?

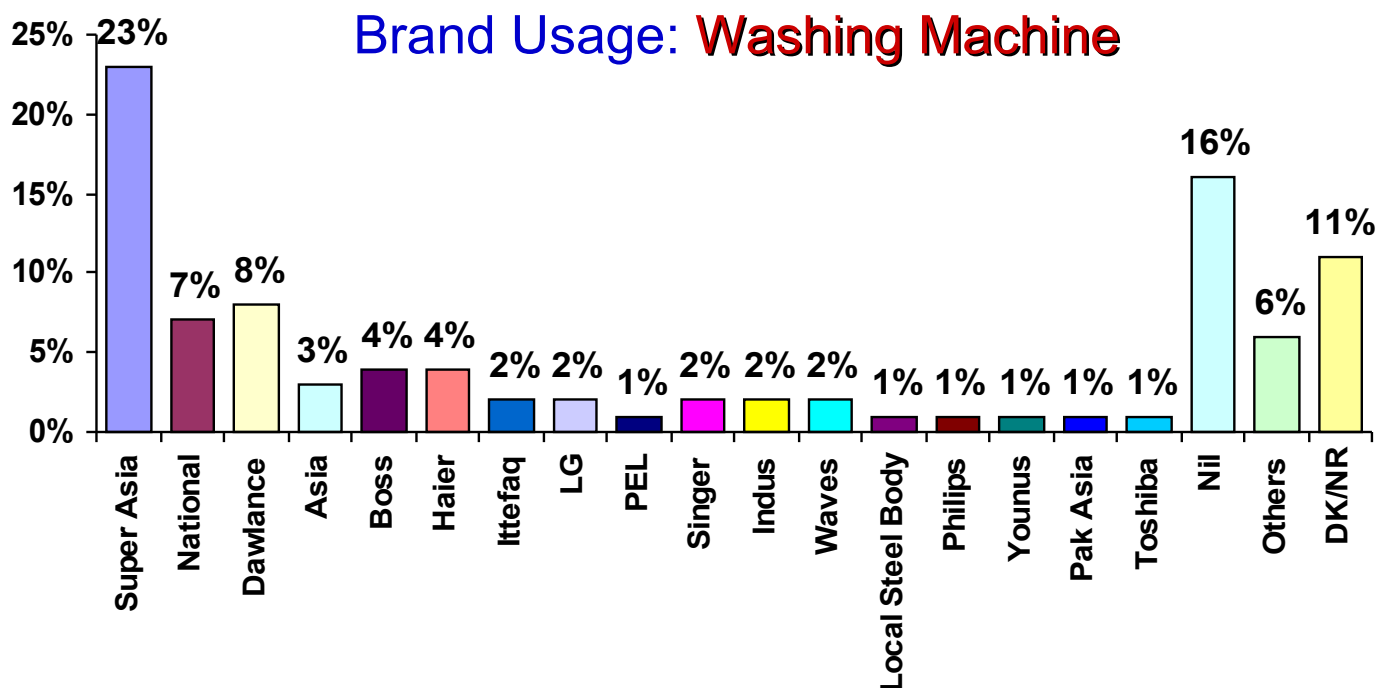


Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Washing Machine

Question: Which 'Washing Machine' brand do you use the most?

Percent of Respondents (%)



Super Asia	23
National	7
Dawlance	8
Asia	3
Boss	4
Haier	4
Ittefaq	2
LG	2
PEL	1
Singer	2
Indus	2
Waves	2
Local Steel Body	1
Philips	1
Younus	1
Pak Asia	1
Toshiba	1
Nil	16
Others	6
DK/NR	11

Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011: Washing Machine

- **Brand Recall**

22% of people have been reported to state Super Asia as the first brand that comes to mind when hearing the word, Washing Machine. National and Dawlance come second with a percentage of 8 each.

- **Ad Recall**

Super Asia's adverts were most-commonly recalled followed by Dawlance, corresponding to 14% and 9% respectively.

- **Brand Usage**

Super Asia is used the most among 23% of the sample population. Dawlance comes next with a total of 8%.

- **Overall Leader: Super Asia**

Super Asia holds first place in all three of the questions asked for this category.



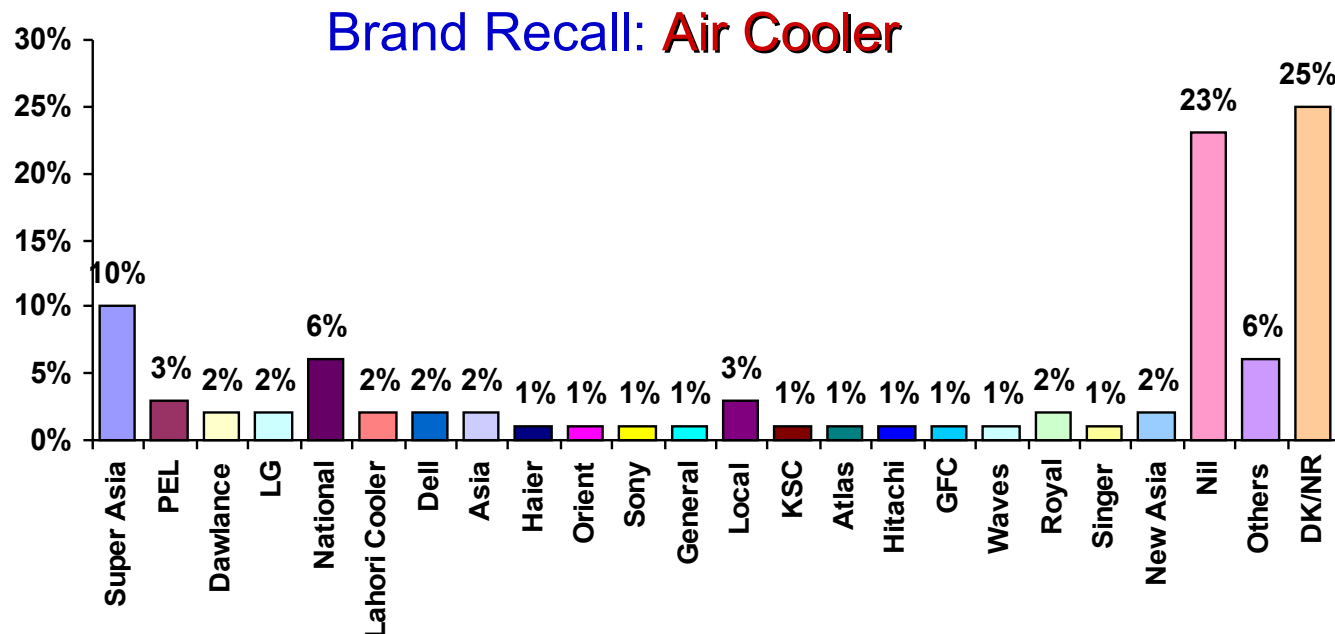
Section 3d

Air Cooler



Brand Recall: Air Cooler

Question: When you hear the name 'Air Cooler' which brand comes to your mind first?



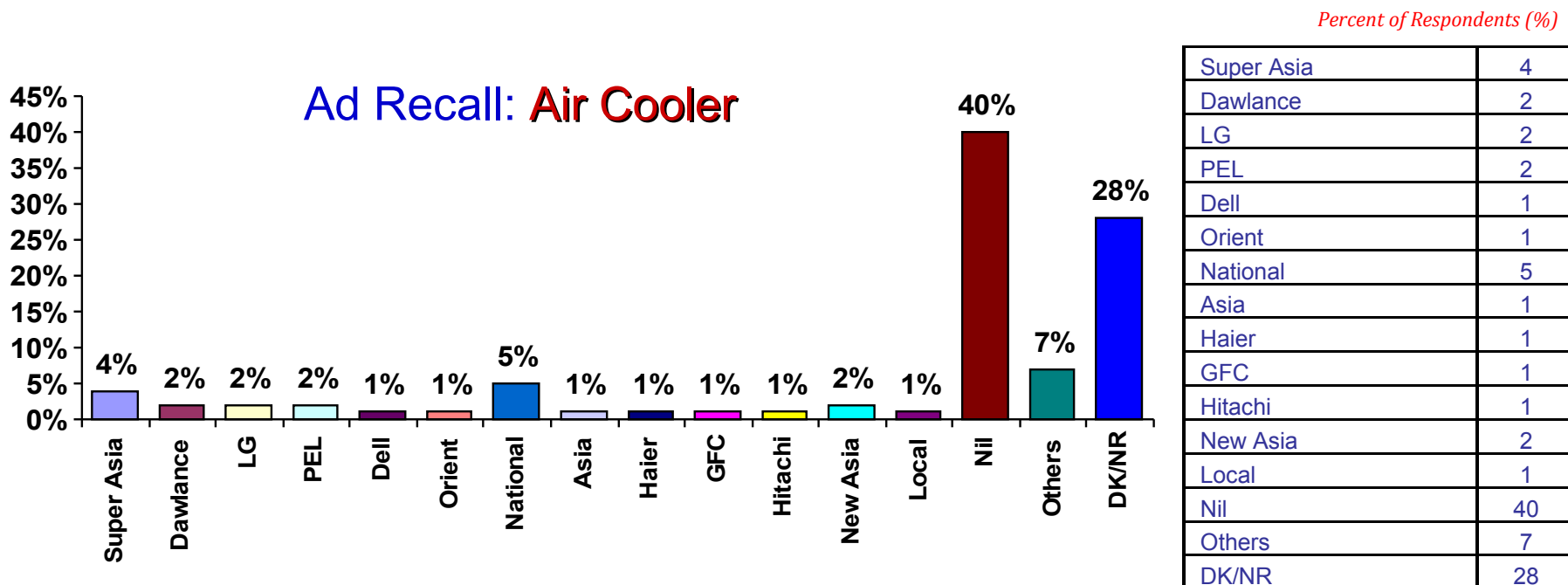
Percent of Respondents (%)

Super Asia	10
PEL	3
Dawlance	2
LG	2
National	6
Lahori Cooler	2
Dell	2
Asia	2
Haier	1
Orient	1
Sony	1
General	1
Local	3
KSC	1
Atlas	1
Hitachi	1
GFC	1
Waves	1
Royal	2
Singer	1
New Asia	2
Nil	23
Others	6
DK/NR	25

Source: Gallup Pakistan National Public Opinion Poll 2011

Ad Recall: Air Cooler

Question: During the last week can you name one 'Air Cooler' advertisement on TV or Newspaper or Billboards that you remember?



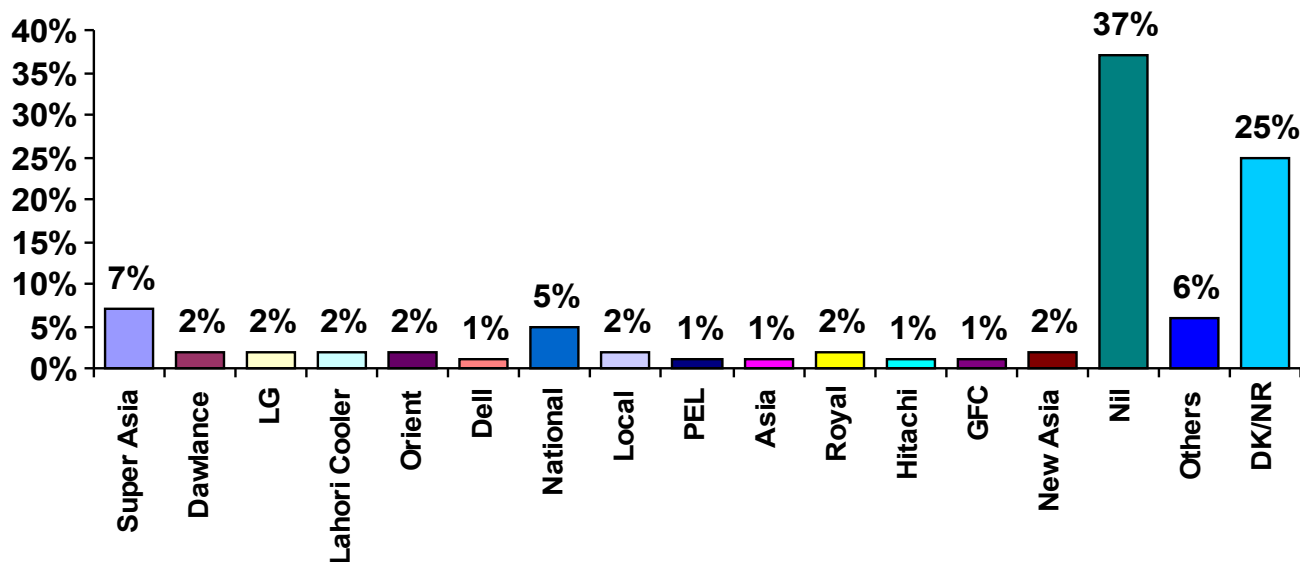
Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Air Cooler

Question: Which 'Air Cooler' brand do you use the most?

Percent of Respondents (%)

Brand Usage: Air Cooler



Super Asia	7
Dawlance	2
LG	2
Lahori Cooler	2
Orient	2
Dell	1
National	5
Local	2
PEL	1
Asia	1
Royal	2
Hitachi	1
GFC	1
New Asia	2
Nil	37
Others	6
DK/NR	25

Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011: **Air Cooler**

- **Brand Recall**

Super Asia's air coolers were the first to be thought of among a total of 10% sample population, with no significant competitor.

- **Ad Recall**

5% of the people surveyed recalled seeing National's adverts the most, whereas the figure was 4% for Super Asia.

- **Brand Usage**

Super Asia is widely used amongst 7% of the population followed by National at 5%.

- **Overall Leader: Super Asia's air coolers**

Super Asia's air coolers are widely used and recalled by people the most, however as far as advertisements are concerned, National's air coolers are more famous.



Section 4

Vehicles



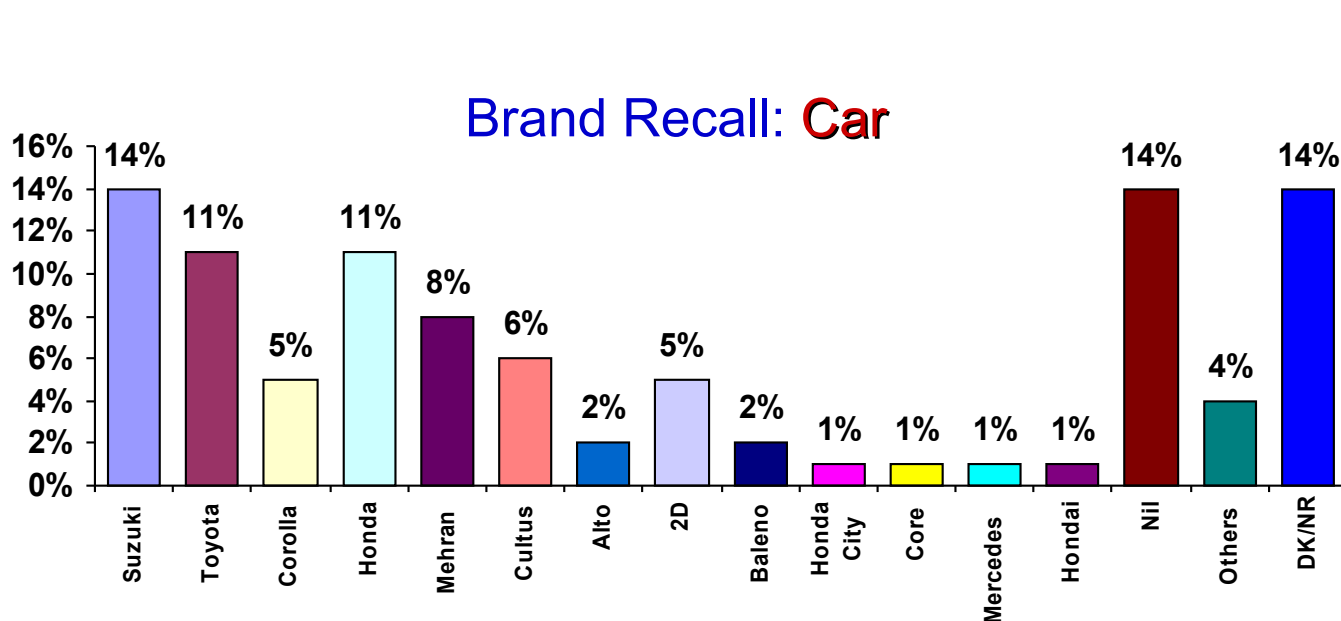
Section 4a

Car



Brand Recall: Car

Question: When you hear the name 'Car' which brand comes to your mind first?



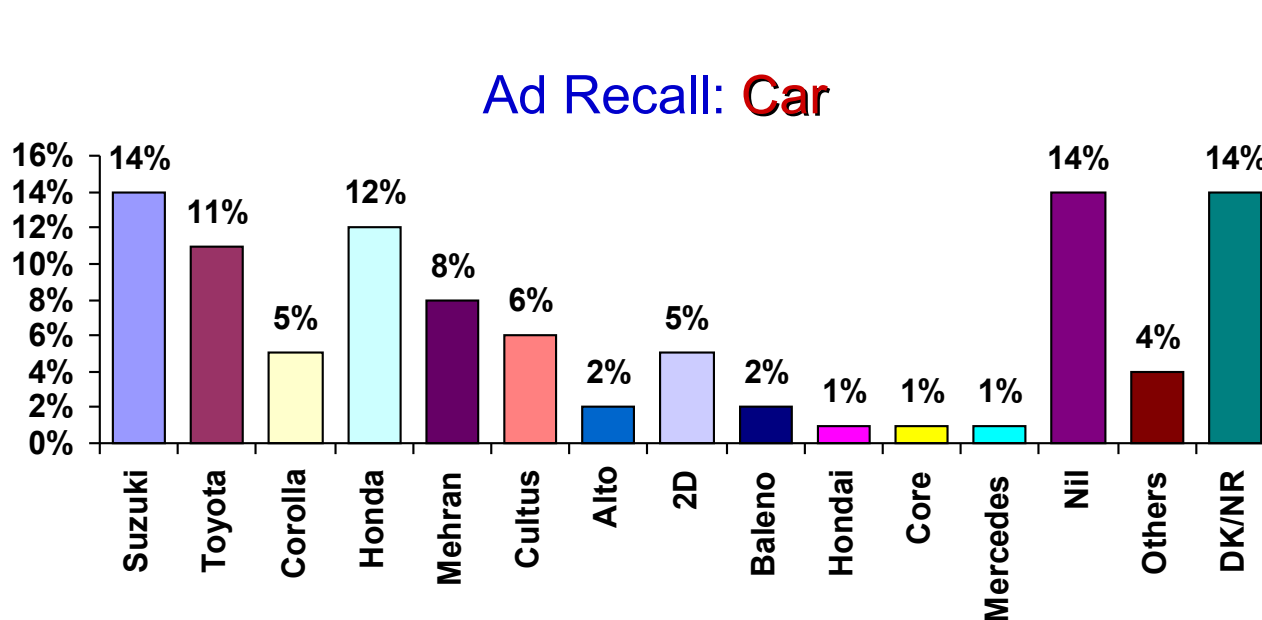
Percent of Respondents (%)

Suzuki	14
Toyota	11
Corolla	5
Honda	11
Mehran	8
Cultus	6
Alto	2
2D	5
Baleno	2
Honda City	1
Core	1
Mercedes	1
Hondai	1
Nil	14
Others	4
DK/NR	14

Source: Gallup Pakistan National Public Opinion Poll 2011

Ad Recall: Car

Question: During the last week can you name one 'Car' advertisement on TV or Newspaper or Billboards that you remember?



Percent of Respondents (%)

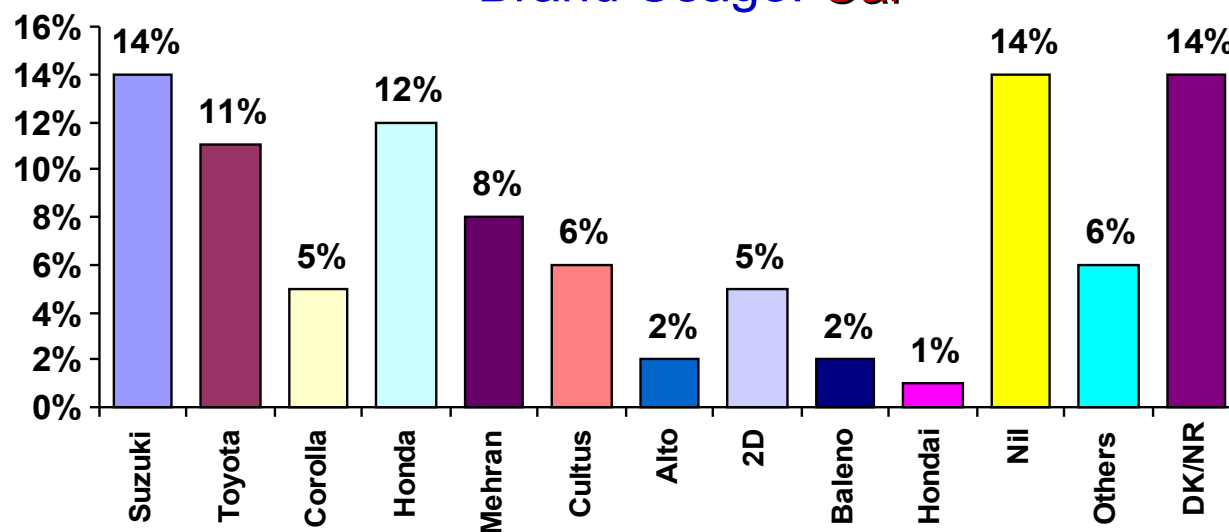
Suzuki	14
Toyota	11
Corolla	5
Honda	12
Mehran	8
Cultus	6
Alto	2
2D	5
Baleno	2
Hondai	1
Core	1
Mercedes	1
Nil	14
Others	4
DK/NR	14

Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Car

Question: Which 'Car' brand do you use the most?

Brand Usage: Car



Percent of Respondents (%)

Suzuki	14
Toyota	11
Corolla	5
Honda	12
Mehran	8
Cultus	6
Alto	2
2D	5
Baleno	2
Hondai	1
Nil	14
Others	6
DK/NR	14

Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011: Car

- **Brand Recall**

The brand, Suzuki, came to mind when the word 'car' was heard, for a total of 14 percent, succeeded by Toyota and Honda at 11% each.

- **Ad Recall**

14% of respondents recalled seeing adverts of Suzuki the most, whereas 12% voted for Honda and 11% for Toyota.

- **Brand Usage**

Suzuki cars are used most by a total of 14% of the people surveyed, whereas it was 12% for Honda and 11% for Toyota respectively.

- **Overall Leader: Suzuki cars**

Suzuki cars are being recalled and used the most out of all the car brands available in Pakistan.



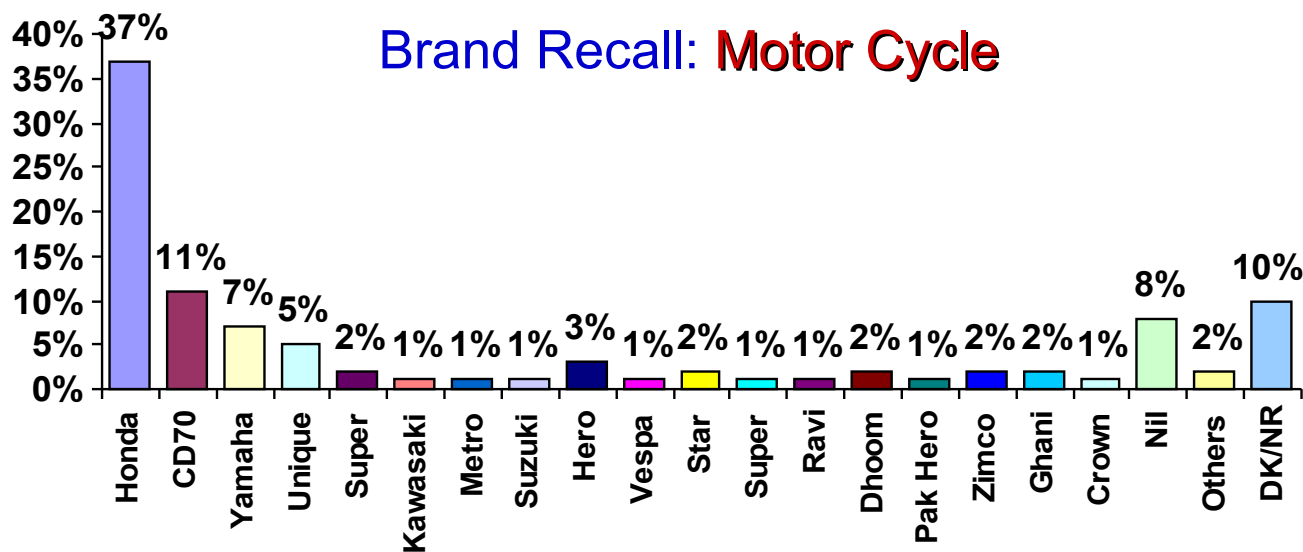
Section 4b

Motor Cycle



Brand Recall: Motor Cycle

Question: When you hear the name 'Motor Cycle' which brand comes to your mind first?



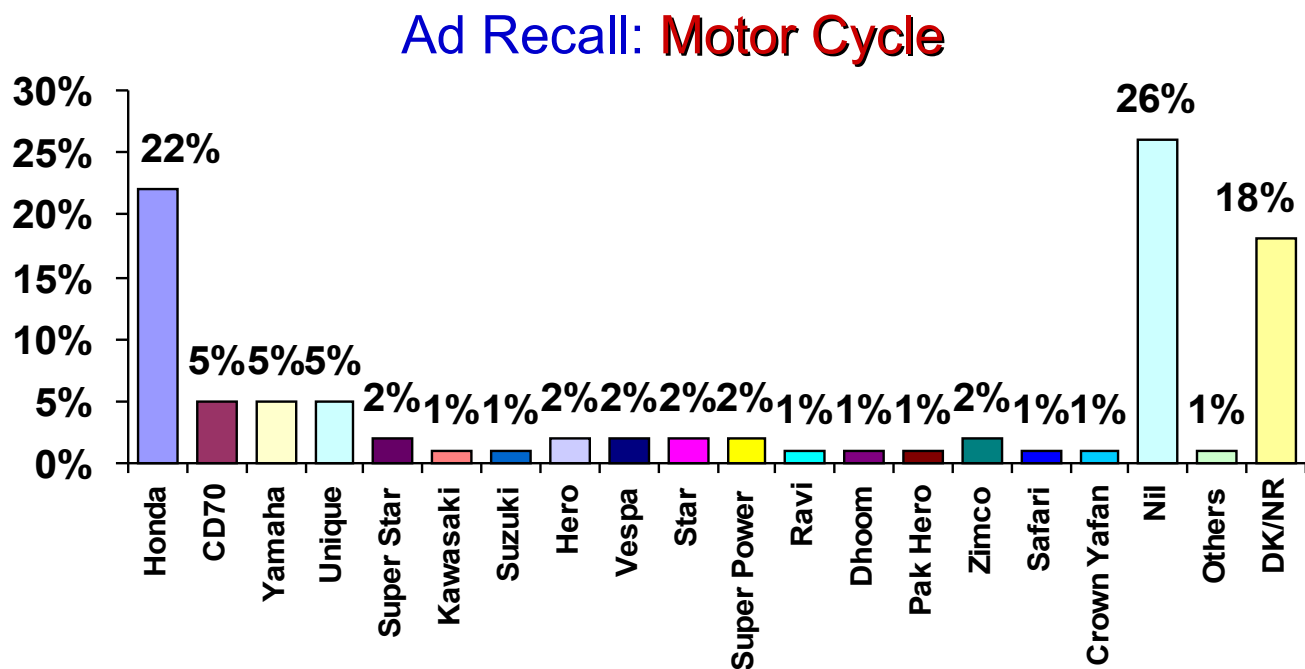
Percent of Respondents (%)

Honda	37
CD70	11
Yamaha	7
Unique	5
Super Star	2
Kawasaki	1
Metro	1
Suzuki	1
Hero	3
Vespa	1
Star	2
Super Power	1
Ravi	1
Dhoom	2
Pak Hero	1
Zimco	2
Ghani	2
Crown Yafan	1
Nil	8
Others	2
DK/NR	10

Source: Gallup Pakistan National Public Opinion Poll 2011

Ad Recall: Motor Cycle

Question: During the last week can you name one 'Motor Cycle' advertisement on TV or Newspaper or Billboards that you remember?



Percent of Respondents (%)

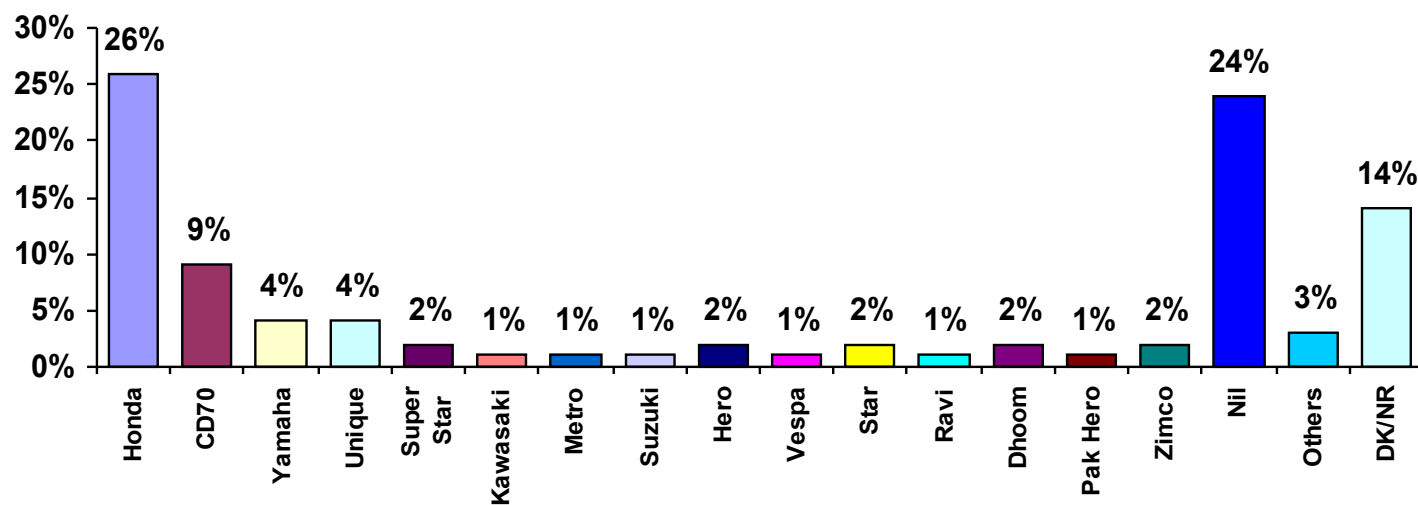
Honda	22
CD70	5
Yamaha	5
Unique	5
Super Star	2
Kawasaki	1
Suzuki	1
Hero	2
Vespa	2
Star	2
Super Power	2
Ravi	1
Dhoom	1
Pak Hero	1
Zimco	2
Safari	1
Crown Yafan	1
Nil	26
Others	1
DK/NR	18

Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Motor Cycle

Question: Which 'Motor Cycle' brand do you use the most?

Brand Usage: Motor Cycle



Percent of Respondents (%)

Honda	26
CD70	9
Yamaha	4
Unique	4
Super Star	2
Kawasaki	1
Metro	1
Suzuki	1
Hero	2
Vespa	1
Star	2
Ravi	1
Dhoom	2
Pak Hero	1
Zimco	2
Nil	24
Others	3
DK/NR	14

Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011:

Motor Vehicle

- **Brand Recall**

When hearing the word 'Motor Cycle', 37% of the population thought of Honda, whereas 11% thought of CD70.

- **Ad Recall**

Honda adverts were recalled most by 22% of the people, followed by Yamaha, CD70 and Unique all at 5% each.

- **Brand Usage**

Honda also happens to be the most-commonly consumed motor vehicle for 26% of the people surveyed, with CD70 holding 9% respectively.

- **Overall Leader: Honda's Motor Vehicles**

Honda's motor vehicles seemed to be most famous amongst the sample population, that too with no major competitor brand worth mentioning.



Section 5

Mobile Phones



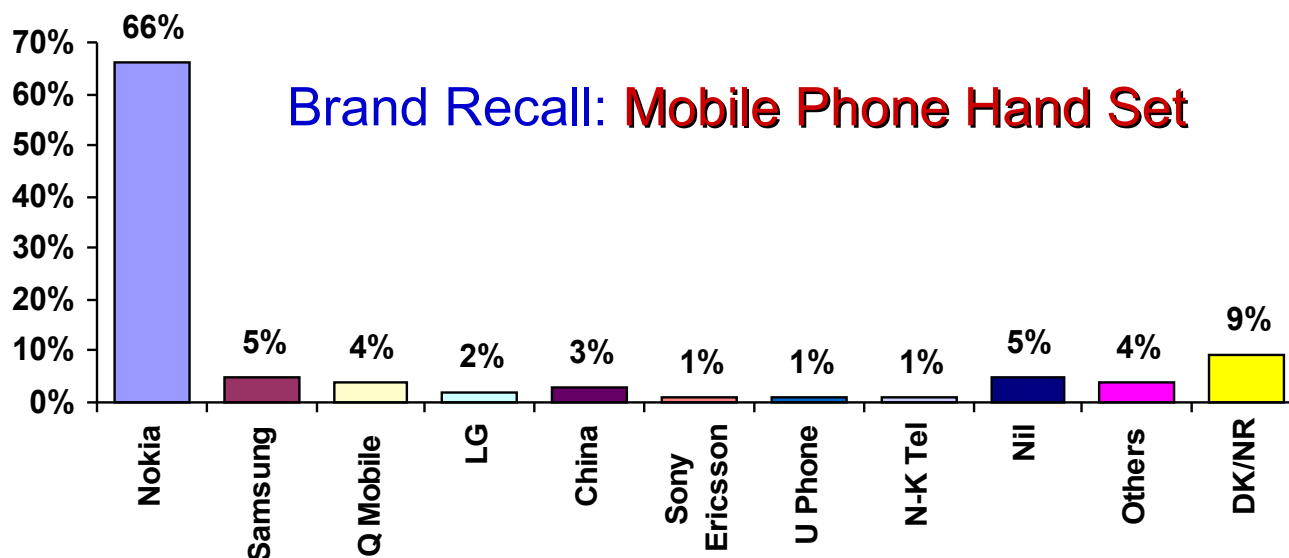
Section 5a

Mobile Phone Hand Set



Brand Recall: Mobile Phone Hand Set

Question: When you hear the name 'Mobile Phone Hand Set' which brand comes to your mind first?



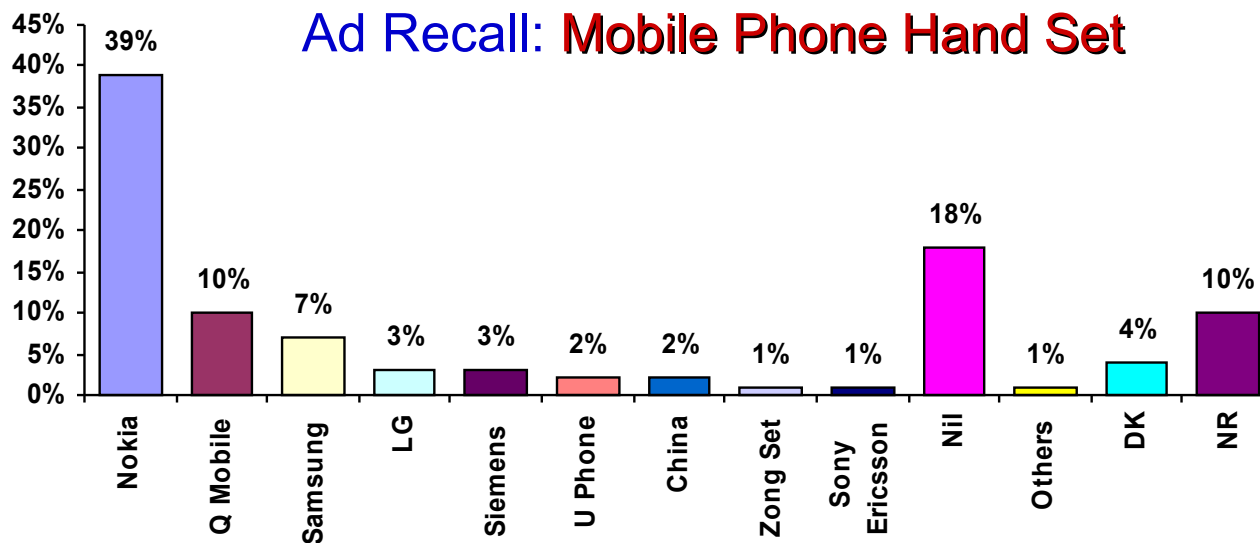
Percent of Respondents (%)

Nokia	66
Samsung	5
Q Mobile	4
LG	2
China	3
Sony Ericsson	1
U Phone	1
N-K Tel	1
Nil	5
Others	4
DK/NR	9

Source: Gallup Pakistan National Public Opinion Poll 2011

Ad Recall: Mobile Phone Hand Set

Question: During the last week can you name one 'Mobile Phone Hand Set' advertisement on TV or Newspaper or Billboards that you remember?



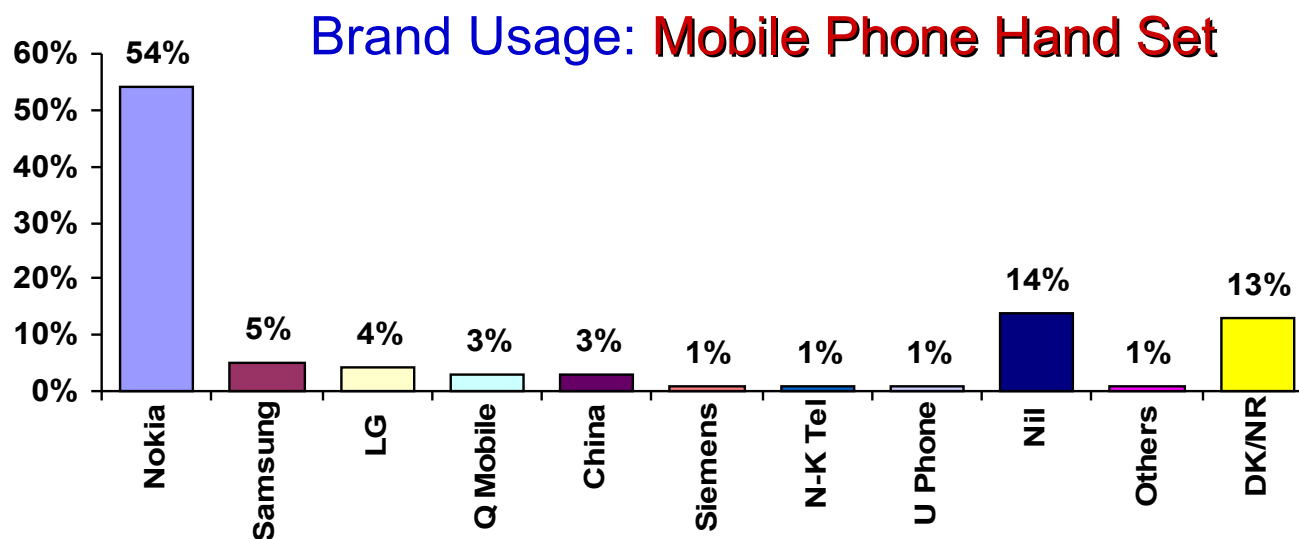
Percent of Respondents (%)

Nokia	39
Q Mobile	10
Samsung	7
LG	3
Siemens	3
U Phone	2
China	2
Zong Set	1
Sony Ericsson	1
Nil	18
Others	1
DK	4
NR	10

Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Mobile Phone Hand Set

Question: Which 'Mobile Phone Hand Set' brand do you use the most?



Percent of Respondents (%)

Nokia	54
Samsung	5
LG	4
Q Mobile	3
China	3
Siemens	1
N-K Tel	1
U Phone	1
Nil	14
Others	1
DK/NR	13

Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011: Mobile Phone Hand Set

- **Brand Recall**

Nokia got highest number of votes for brand recalled the most, at a 66%.

- **Ad Recall**

Nokia's advertisements were also recalled the most by the people questioned at (39%).

- **Brand Usage**

Nokia yet again, stands no competition as 'brand used the most' at 54%.

- **Overall Leader: Nokia**

The survey suggests that Nokia has managed to attract more than half of the market.



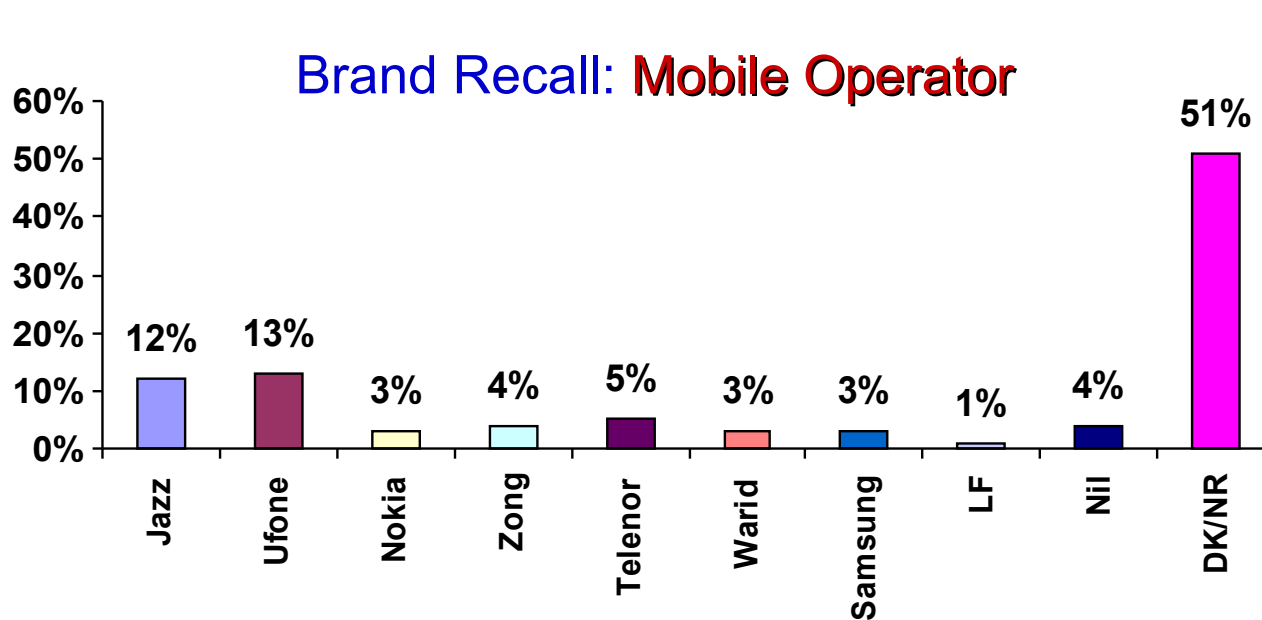
Section 5b

Mobile Operator



Brand Recall: Mobile Operator

Question: When you hear the name 'Mobile Operator' which brand comes to your mind first?



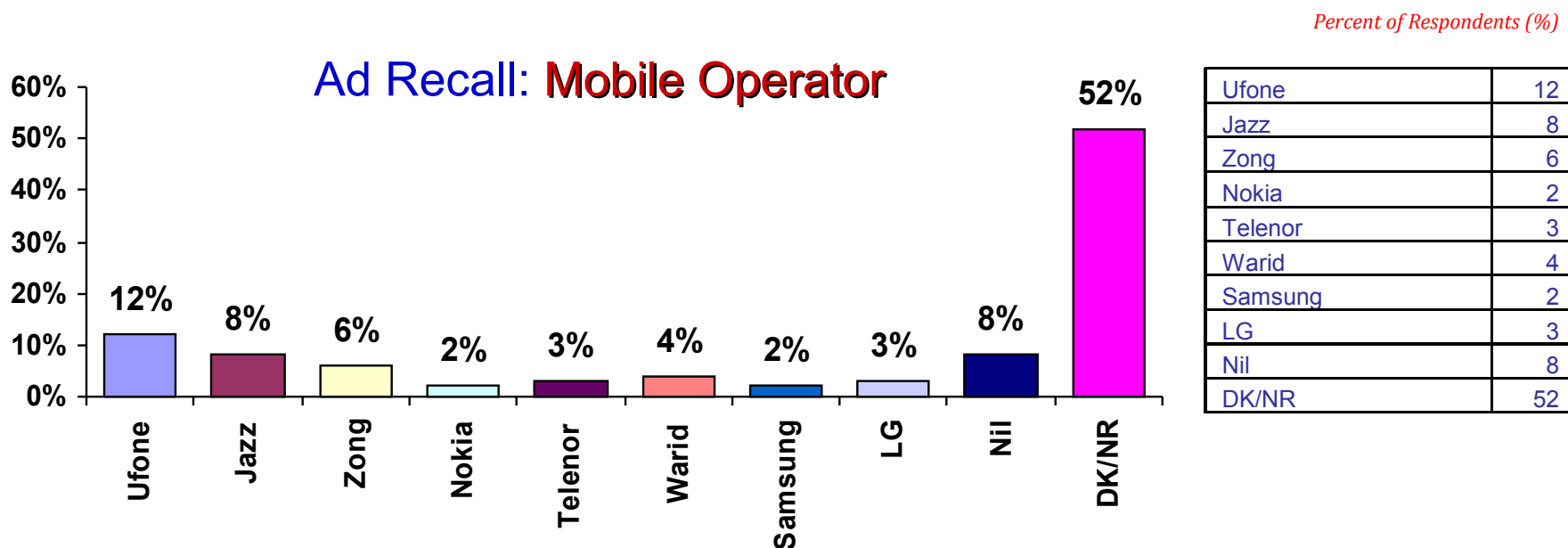
Percent of Respondents (%)

Jazz	12
Ufone	13
Nokia	3
Zong	4
Telenor	5
Warid	3
Samsung	3
LF	1
Nil	4
DK/NR	51

Source: Gallup Pakistan National Public Opinion Poll 2011

Ad Recall: Mobile Operator

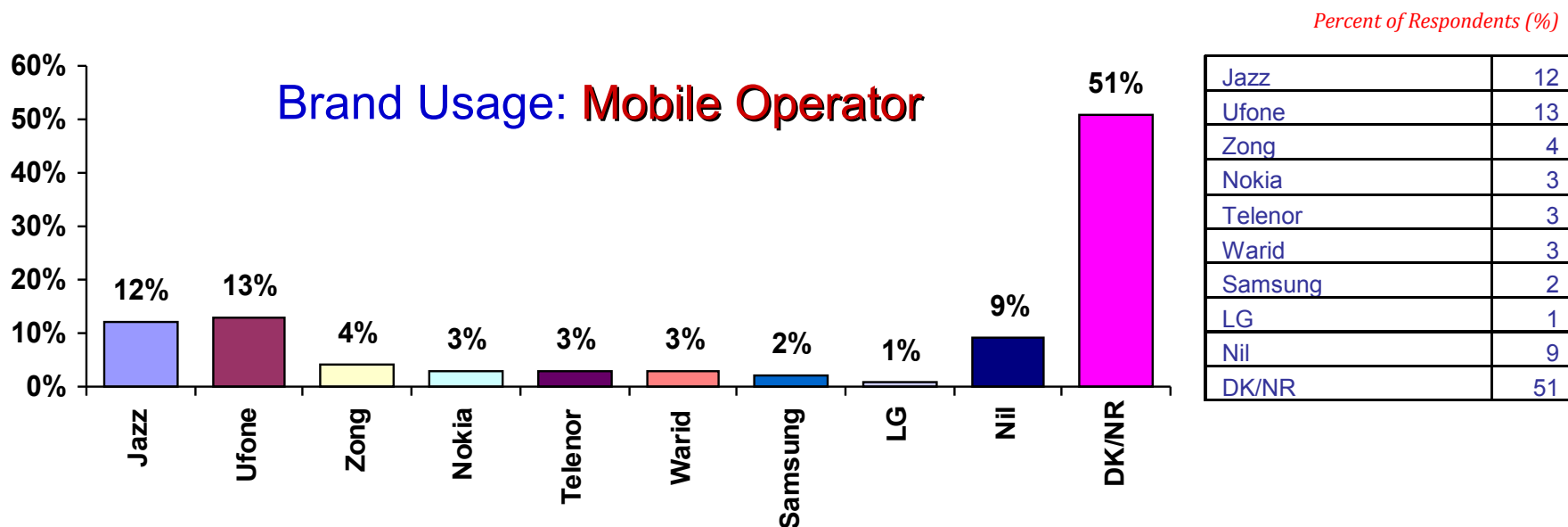
Question: During the last week can you name one 'Mobile Operator' advertisement on TV or Newspaper or Billboards that you remember?



Source: Gallup Pakistan National Public Opinion Poll 2011

Brand Usage: Mobile Operator

Question: Which 'Mobile Operator' brand do you use the most?



Source: Gallup Pakistan National Public Opinion Poll 2011

Results of Brand Referendum 2011:

Mobile Operator

- **Brand Recall**

Ufone (13%) with Jazz (12%) have been recalled the most by the Pakistani public.

- **Ad Recall**

Ufone's advertisements were recalled the most by the respondents. (12%)

- **Brand Usage**

Ufone (13%) and Jazz (12%) are being used the most by the people who were questioned.

- **Overall Leader: Ufone**

Ufone stands first in all three of the categories for Mobile Operator.



Section 7

DEMOGRAPHICS



RESEARCH DESIGN

- Face to face, in-home interviews
- Sample size (N=2697)
- The data represent a cross section of adult population of different parts of Rural and Urban Pakistan.
- The Sample was selected through a scientific process and represents both men and women in rural and urban areas of all **4 Provinces** of the country. The error margin for a sample for this size is approximately $\pm 3\%$ at 95 percent confidence level.
- The field work was carried out face to face in June, 12-13, 2011.

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For more details on Methodology, please contact Gallup Pakistan

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