

Cyberletter^{Media}

Media Advertising Spend Edition

Media Advertising Spend in Pakistan: **July 1, 2009 to June 30, 2010**
 Produced by: Gallup Pakistan Jointly with Gilani Research Foundation

2009-2010 Edition

In this Issue

Total Advertising Spend Page 1

TV Spend Breakup ...Page 2

Print Spend Breakup ...Page 3

From the Editor

Dear Reader,

We are happy to present to you the February Edition of Gallup Pakistan's Media Cyber letter focusing on the **Ad spend**. We look forward to your comments and feedback. More details can be found on our website www.gallup.com.pk

Editorial Team:

Babar Aziz, Gallup Karachi
 Aleena Aziz, Gallup Islamabad
 Email: cyberletter@gallup.com.pk

Advisory Committee:

Dr. Ijaz Shafi Gilani,
 Chairman & Chief Executive
 and Jawaid Muhammad Salik,
 Exec. Dir., Media Research
 Division, Gallup Pakistan.

Total Advertising Spend has Risen to 30 Billion Rupees

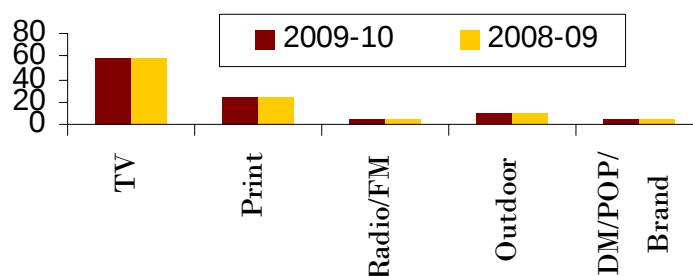
Findings:

Total Advertising Spend in Pakistan is estimated at 30 Billion Rupees; an **increases by 12%** over the previous year. The largest increase was seen in TV (17%). Interestingly Print Ad Spend increased the least (4% only).

Media (FY 2009-10)	Rs. (Billions)	% share	% change from last year
TV	17.29	57.48	17 ↑
Print	7.31	24.30	4 ↑
Radio/FM	1.18	3.92	5 ↑
Outdoor	2.60	8.64	9 ↑
DM/POP/ Brand Activation/ Misc.	1.70	5.65	9 ↑
Total	30.08	100.00	12 ↑

Two Year Trend in SHARE OF SPEND

The Advertising Spend in Pakistan according to Gallup Estimates is **30.08 Billion Rupees** (approximately 350 Million US Dollars). TV advertising claims 58% of the Total Advertising Budget in the country and shows the relevance of TV as the most popular medium of communication in Pakistan.



Note:

- Gallup Pakistan has applied a discount rate of 65% on the rate card.
- Gallup Pakistan Ad Spend estimates are exclusive of any taxes but include agency commission.
- Scrolls, animations, logos, backdrops, window ads etc have been included in the Gallup Pakistan Data.
- Gallup Pakistan has included the ad spend of TV Channels which advertise in print.

Cyberletter © from Gallup & Gilani Pakistan, affiliated with Gallup International Association, is released with the courtesy of Gilani Foundation. These Cyberletters are part of public service to the community of practitioners and academics. Gallup Pakistan is NOT related to Gallup Inc. based in the U.S.A.

TV Spend Breakup

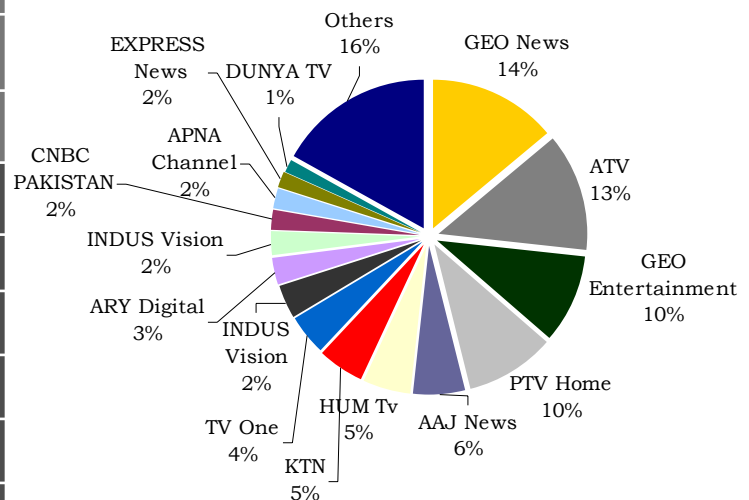
Terrestrial Channels have only 25% share in total TV Ad Spend, which is far smaller than their share in Total TV Viewership figures.

Channels (FY 2009-10)	Rs. (Billions)	% Share
 GEO News	2.405	13.91
 ATV	2.195	12.70
 GEO Entertainment	1.696	9.81
 PTV Home	1.654	9.57
 AAJ News	0.970	5.61
 HUM TV	0.918	5.31
 KTN	0.886	5.12
 TV One	0.745	4.31
 CARTOON Network	0.639	3.69
 ARY Digital	0.537	3.11
 INDUS Vision	0.400	2.31
 CNBC PAKISTAN	0.386	2.23
 APNA Channel	0.384	2.22
 EXPRESS News	0.285	1.65
 PTV News	0.269	1.56
Others	2.923	16.90

Findings:

Geo News has the highest share (13.91%) of all TV Advertising Budget in the country, followed by **ATV** (12.7%), **Geo Entertainment** (9.81%) and **PTV Home** (9.57%) etc.

TV Advertising Market Share



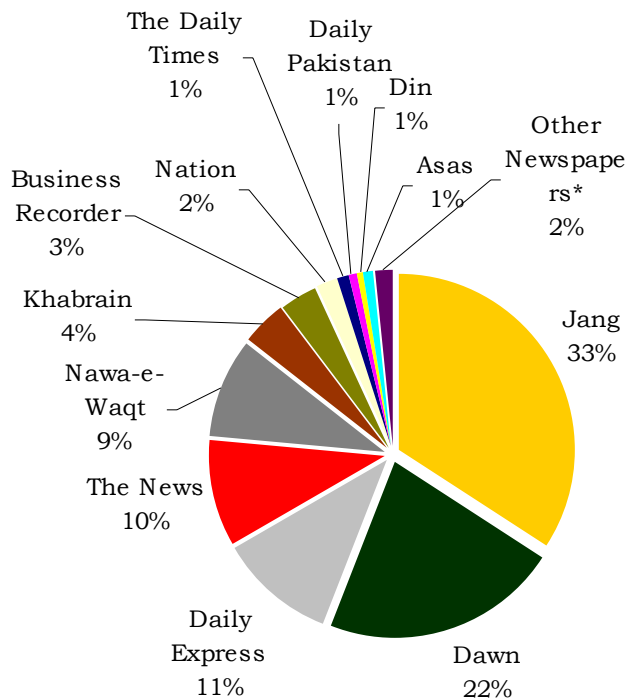
Note:

1. Gallup Pakistan has applied a discount rate of 65% on the rate card.
2. Gallup Pakistan Ad Spend estimates are exclusive of any taxes but include agency commission.
3. Scrolls, animations, logos, backdrops, window ads etc have been included in the Gallup Pakistan Data.
4. Gallup Pakistan has included the ad spend of TV Channels which advertise in print.

Print Spend Ad

Newspapers

Jang Newspaper has the highest share in Print Advertising Budget (34%) followed by **Dawn** (21.74%) and **Daily Express** (11%).



Newspapers (FY 2009-10)	Rs. (Billions)	% Share
 Jang	2.434	34.05
 Dawn	1.554	21.74
 Daily Express	0.784	10.96
 The News	0.695	9.72
 Nawa-e-Waqt	0.654	9.15
 Khabrain	0.300	4.20
 Business Recorder	0.224	3.13
 The Nation	0.139	1.94
 The Daily Times	0.096	1.35
 Daily Pakistan	0.052	0.72
 Din	0.047	0.66
 Asas	0.044	0.62
 Other Newspapers*	0.125	1.75

Ten Year Reflective Study on TV Advertising

Rank (2009)	Top 10 Sectors	Rank (2001)
1	Telecommunication	16
2	Foods	1
3	Drinks	2
4	Household Cleaning Materials	8
5	Hair Care	6
6	Soaps	9
7	Confectionary	3
8	Real Estate	19
9	Skin Care	12
10	Household/ Office Goods	5

Findings:

Telecommunication
rise from
'#16' in Year 2001
to **'#1'**
in the Year 2009.

Data Source: Gallup Pakistan
Period: 2001 to 2009
Ranking based on ad volume
(advertising seconds)

Note:

- Gallup Pakistan has applied a discount rate of 65% on the rate card.
- Gallup Pakistan Ad Spend estimates are exclusive of any taxes but include agency commission.
- Scrolls, animations, logos, backdrops, window ads etc have been included in the Gallup Pakistan Data.
- Gallup Pakistan has included the ad spend of TV Channels which advertise in print.

Cyberletter Media

Media Advertising Spend Edition 2009-10: Produced by: Gallup Pakistan
Jointly with Gilani Research Foundation

2009-2010 Edition

Top Ten Companies on TV

Findings:

The TOP 10 Companies advertised on TV made up more than 56% of total advertising share in 2010. **UNILEVER** maintains its **TOP** position, followed by **PTCL**, **China Mobile**, **Telenor** and **P&G**.

Rank (FY 2009-10)	Company	% Share
 1	UNILEVER PAKISTAN LTD	15.17
 2	PAKISTAN TELECOMMUNICATION COMPANY LTD (PTCL)	7.36
 3	CHINA MOBILE	6.44
 4	TELENOR PAKISTAN (PVT) LTD	6.33
 5	PROCTER & GAMBLE PAKISTAN	5.13
 6	PAKISTAN MOBILE COMMUNICATION (PVT) LTD	4.11
 7	NESTLE PAKISTAN LIMITED	3.70
 8	ENGRO FOODS (PVT) LTD	2.85
 9	COLGATE PALMOLIVE PAKISTAN LTD	2.52
 10	PEPSI COLA INTERNATIONAL	2.48

For a Detailed Report on Advertising Revenue Figures please visit our Website or contact the Cyberletter Team.

Media Cyberletter Editorial Team,
Email: cyberletter@gallup.com.pk

A year to thank,
share and reinvent
Gallup & Gilani: 1980-2011



Disclaimer: All effort has been made to ensure the accuracy and credibility of information contained in this edition. Gallup Pakistan does not claim any responsibility for loss or profit made out of use of data presented here.