

From the Editors

It was gratifying to receive a rather warm and positive response to the introductory issue of Gallup Cyberletter. So, God willing we will do our best to continue it and bring to you on a regular basis the latest on advertising expenditure, TV audience ratings and other interesting news and analysis on media research. Whenever there is an opportunity we shall also make comparisons with data available from the region or internationally. For example you will see some interesting insight in this issue on the common names among the Top 10 advertisers in India and Pakistan.

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Glimpses from Media Research Get Together in Karachi on September 12

TV AD-EX: Comparison with India

Four of the top 10 advertisers are the same in India and Pakistan.

For an interesting comparative picture see page 2

TOP RATED TV PROGRAMS: Fragmentation of TV Audience

It is interesting to note that no TV program gets more than 16% of audience among homes with cable TV or satellite dishes (C&S homes). The much predicted fragmentation of TV audience has finally happened in this segment of Pakistani TV viewers.

See page 3.

SATELLITE TV: STAR PLUS

Different countries but similar preferences on Satellite TV as 4 of the Top 5 programs on Star Plus among C&S homes are surprisingly similar for both Pakistan and India.

For an interesting comparison of Ratings for the Top 5 programs of Star Plus in Pakistan & India, see page 4.

TAM NEWS HIGHLIGHTS

- Get Together of Media Researchers and Planners was recently held in Karachi. Twenty leading media researchers from among the advertising community, TV channels and TAM specialists heard Mansoor Khan and exchanged views on TV ratings in a lively dinner gathering.
- A shocking disclosure on the web started an interesting debate in India over the confidentiality of Peoplemeter panels and need for independent measurement of TV audience.
- Peoplemeter team successfully integrates Polling and Processing software with Analysis software. A landmark step for media research in Pakistan.

Details on page 5.

TV ADVERTISING EXPENDITURE IN AUGUST 2001

The TV Ad spend (on rate card basis) was 2% higher in August compared to July. The top ten advertisers accounted for 57% of the total ad spend. Most names in the top 10 are stable throughout the last three months. But there are a few which enter and exit. It is notable that several companies are advertising at just about the same level.

Although the comparison is for two different years, it is most interesting to note that 4 of the top 10 advertisers in India and Pakistan are the same companies! Levers tops in both countries, P&G is number 2 in Pakistan and number 8 in India, Reckitt is number 4 in Pakistan and number 5 in India and Nestle is number 7 in Pakistan and number 3 in India. **If any of you would like to write a short feature article on this interesting piece of information, we would greatly value that and should like to include it in a future issue of the Cyberletter.** Please contact the editors.

THE TOP 10 TV ADVERTISERS IN PAKISTAN

The expenditure in the table below is by Company or Group, combining all brands advertised by them on television. In case there are any errors or omissions, the editors would be happy to receive your feedback and make merited rectifications.

Percent share in advertising value:

		August	July	June
1	Lever Brothers	13%	20%	15%
2	Procter & Gamble	12%	13%	7%
3	Lakson Group*	11%	12%	12%
4	Reckitt Benckiser	6%	5%	8%
5	Union Bank	3%	**	**
6	Pakistan Tobacco Company	3%	6%	3%
7	Nestle Milkpak	3%	2%	4%
8	Pepsi Cola	2%	**	**
9	Continental Biscuits	2%	2%	2%
10	Pakistan Agro Chemical	2%	**	**

*Includes Lakson Tobacco and Colgate Palmolive

**was not in top 10 during the month

Percentages have been rounded off to whole numbers.

TOP 10 INDIAN TV ADVERTISERS

- | | |
|--------------------------------|--------------------------------|
| 1. Hindustan Levers | 6. Cadbury |
| 2. Dabur | 7. Smithkline Beecham |
| 3. Nestle | 8. Procter & Gamble |
| 4. Marico | 9. Henkel Spic |
| 5. Reckitt & Colman | 10. Indian Shaving Products |

Note: The Indian data are for January-December, 1999 while the Pakistan data are for 2001. The Indian rankings for 2001 could possibly be somewhat different.

Reporting Period: September 1-7, 2001
**AUDIENCE OF TOP 10 OF PTV AMONG
 SAT & NON-SAT HOMES**

PTV programs continued to receive large audiences except in homes which have access to cable TV or satellite dishes. In such homes hardly any program received more than 15% audience (also see the article on Satellite TV on page 4). The much discussed fragmentation of TV audience has thus arrived in this segment of the market.

These data refer to the time period Sep 1-7. More recent data are also available. Those who are interested may contact Mansoor Khan or Zeeshan Muhammad Khan at Mansoor.khan@tnsofres.com

Program Name	<i>Ratings Among</i>			
	All Homes	Non C&S Homes National	C&S Homes National	C&S Homes Karachi
SAWAN	45	51	13	11
DAM-E-RASAI	44	50	11	9
ARMAAN	42	47	16	6
AINI	40	46	11	8
AIK UMEED	40	45	12	5
MOME KA CHEHRA	39	44	11	8
MUSKURAHAT	39	45	9	6
THE INCREDIBLE	31	35	8	7
FUNGAMA	29	33	6	5
MAA	28	31	8	5

** Ratings refer to percentage 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).*

SATELLITE CHANNELS: Cross Border Comparisons

It is most striking to note the similarities in the audience share of leading Star Plus family dramas in India and Pakistan. According to August data, (based on the last week of Aug) *Kahaani Ghar Ghar Ki*, *Kyunki Saas bhi Kabhi Bahu Thi*, *Khul Ja Sim Sim*, *SSSHHH..Koi Hai* and *KBC* were the popular Star Plus serials in Pakistan and all five of them were included among the top 10 in India. See the table below for an interesting comparison.

TV Ratings of Star Plus Among Cable and Satellite Viewers

	<u>Pakistan</u>	<u>India</u>
1. Kahani Ghar Ghar Ki	11.6	9.8
2. Kyunki Saas Bhi Kabhi Bahu Thi	11.2	11.2
3. Khul Ja Sim Sim	8.8	5.8
4. SSSHHHH..Koi Hai	7.5	5.3
5. Kaun Banega Crorepati	7.3	4.1

Period: 25-31 Aug 2001

Period: 20-26 Aug 2001

Source: Gallup TV Ratings (for Pakistan) and
ORG-MARG (for India)

This Cyberletter is being issued as part of Gallup-Taylor Nelson Sofres Project TAM (Television Audience Measurement). It is directed by Mansoor Khan who heads the TAM, and is co-edited by Zeeshan Muhammad Khan, Uzma Athar and Nadia Rathore. All research is carried out by the Gallup Media Research Team led by Afaq Alam. The production of the Cyberletter is overseen by an Advisory Committee comprising of Dr. Ijaz Gilani and Jawaid Mohammad Salik.

Get-together of Media Research Professionals

On Wednesday 12th September a get-together of the top media and media agencies took place at the Defence Club in Karachi.

The main purpose of organizing this event (which will hopefully continue in the future) was to facilitate interaction among professionals in this industry to discuss topical issues, and all in an informal lively atmosphere. The get-together also gave Mansoor Khan (newly appointed Head of TAM in Pakistan) an opportunity to introduce himself and talk about his world-wide experience in Peoplemeter TAM. He gave 'live' demonstration of the 'all' important and powerful Peoplemeter Panel Administration and Quality Control Management Software. This further added interest and more questions by a lively, curious and intelligent audience, which continued unabated during dinner.

All in all the event lived up to its purpose, with many commenting on how much they enjoyed this get-together.

Indian Controversy on TV Ratings Highlights the Need for Independent Measurement

There has been an interesting debate in India on the quality of Peoplemeters data. It all began when the identity of TV panel members in Mumbai was disclosed on a website by an unidentified person leading many to challenge the authenticity and quality of TV ratings provided by ORG-MARG and TAM Media Research. The two companies however defended their position and attributed the entire episode to the mischief of some quarters whose interests were opposed to the availability of objective and independently measured ratings. **The controversy once again highlighted the strong need for an arms length distance between TV audience measurement and those who either sell or buy airtime.**

Peoplemeter Ratings Produced: Landmark for Pakistan

Through the concerted and professional efforts of the TAM team especially Afaq, Imran, Babar and Aqeel, and with the invaluable support from our colleagues in Sofia (BBSS) and London (TNSofres) Gallup-Taylor Nelson Sofres made a significant achievement in operating successfully the whole Peoplemeter TAM system from beginning to end, a definite landmark for TAM research in Pakistan!

The team has now managed to poll automatically overnight from homes on the test panel. Hence viewing data from the Peoplemeter in the homes was able to be collected. The next automatic procedure was that the collected viewing data was then sent through the advanced panel management, quality control and processing system. Now this processed data was again successfully interfaced with the analysis software to produce the all important Peoplemeter TV Ratings.

This complete process from beginning to end worked smoothly without any technical hitches, thus enabling the TAM operation to reach a critical state of readiness. So congratulations are in order to everyone involved in achieving this significant milestone!