

From the Editors

These are trying times for the Pakistan economy including the field of media and advertising. But, as a principle, the more informed we are, the better we would be to cope with adversity. Our Cyberletter will play its modest role in informing you on the dynamics of advertising expenditure and other relevant indicators. **This issue provides some early information on the effects of September 11 events on advertising in Pakistan.**

There is good news in the field of TAM (Television Audience Measurement). Gallup-Taylor Nelson Sofres TAM project has announced that despite the current crisis its PeopleMeter based TAM service will start beginning January 2002. These little steps will InshaAllah go a long way in bringing professionalism and greater confidence in our ability to face domestic and international crises. **Gallup-Taylor Nelson Sofres cooperation would ensure that a healthy combination of local and global strengths can bring a unique robustness to our service.**

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A view of Gallup-TNS Peoplemeter Team. The Service will begin in January 2002

TV Ad-Ex Drops: In line with Global Trends

The September 11 attacks have caused a global decline in overall advertising expenditure. How has TV ad spend in Pakistan been affected?

See page 2

Did the Viewership of BBC and CNN rise after September 11?

September 11 and subsequent days caused viewership to double for BBC & CNN among C&S viewers in Pakistan.

It is interesting to note that no TV program gets more than 15% of audience among homes with cable TV or satellite dishes (C&S homes).

See page 3.

Print Ad-Ex: Drops....Not Unexpectedly

As total ad spend declined, TV was not the only medium to suffer, newspapers also registered a 10% decline as compared to the previous month.

Also reported are top 10 brands in newspaper advertising in September.

see page 4.

TAM NEWS HIGHLIGHTS

- 2nd Get Together of Media Research Professionals. Mansoor Khan talks about "A Day in the Life of Two Peoplemeter Homes in Karachi"
- Gallup-TNS Announces to begin the Peoplemeter Service starting January 2002.
- Arthur Andersen Representatives will provide Independent Examination & Audit of Gallup TV Ratings.

Details on page 5.

TV ADVERTISING EXPENDITURE IN SEPTEMBER 2001

TV Ad Spend Drops by 16% in September Tapal Tea Rises up the ladder due to re-launch

The TV Ad Spend (on rate card basis) was **16% lower in September as compared to August**. However the top ten advertisers continued to account for 60% of the total ad spend.

In line with a worldwide drop in advertising expenditure after the September 11 incident, the TV ad spend in Pakistan dropped by 16% compared with August. According to industry estimates, the drop might be even sharper in the succeeding months. Gallup Cyberletter will report when the data are in.

TOP 10 TV ADVERTISERS

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:

		September	August	July
1	Lever Brothers	16%	13%	20%
2	Procter & Gamble	11%	12%	13%
3	Lakson Group*	9%	11%	12%
4	Nestle Milkpak	6%	3%	2%
5	Tapal Tea	5%	**	**
6	Reckitt Benckiser	4%	6%	5%
7	Continental Biscuits	3%	2%	2%
8	EBM	3%	**	1%
9	Hilal Confectioneries	3%	**	**
10	The Coca Cola Export Corp.	3%	**	2%

*Includes Lakson Tobacco and Colgate Palmolive Percentages have been rounded off to whole numbers.

**was not in top 10 during that month

Ad Spend Index for 2001 (starting from Jan 2001-Sep 2001)

In order to take a quick look at monthly changes in TV ad spend we are indexing it against January 2001 as 100. The monthly variation of ad spend for both TV and Newspapers can be observed below.

MONTH	Total	TV	Print
January	100	100	100
February	110	112	109
March	117	127	110
April	103	102	105
May	115	114	116
June	112	110	113
July	114	116	112
August	121	119	123
September	105	99	110

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

Reporting Period: Sep 30-Oct 6, 2001

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. For the C&S segment of the TV market, fragmentation of TV audiences is now very much an on-going reality.

These data refer to the time period of September 30 to October 6. More recent data are also available. Those who are interested may contact Mansoor Khan or Zeeshan Muhammad Khan at Mansoor.khan@tnsofres.com

Ratings Among

Program Name	All Homes	Non C&S Homes National	C&S Homes National	C&S Homes Karachi
SAWAN	44	49	15	11
DAM-E-RASAI	44	49	12	12
AINI	44	49	11	10
CHEHRAY	43	49	13	10
MUSKARAHAT	41	46	13	15
TERAY SIWA	41	47	10	11
HAWA PEY RAQS	40	45	13	11
THE INCREDIBLE	32	36	6	5
BUS BHAI BUS	29	33	9	5
MUSIC TIME	29	33	6	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).

Queries of Common Interest*

Did the September 11 Events Raise the Viewership of BBC & CNN?

Viewership for these channels nearly doubled during the week following September 11. The following numbers indicate what happened to viewing of BBC & CNN among those who had access to satellite channels:

Avg. Reach during period:	Sept. 2-10	Sept. 11	Sept. 12-22
Channel			
BBC	2.87	7.73	5.64
CNN	2.64	4.20	3.24

The figures mentioned above are average reach among C&S Viewers for the corresponding time period. On certain post-attack days the average daily reach peaked to 8% reach for BBC and 6% for CNN which appears to be remarkably high for an English language broadcast of news and current affairs.

* This query was raised by Mr. Danish Dobash of Indus Vision. We would welcome any queries from our media research colleagues which may be of common interest to the group, and would certainly try our best to answer them in the Cyberletter.

TOP 10 BRANDS ADVERTISED in NEWSPAPERS September 2001

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

Mobile Phones & Banks Continue to Dominate Commercial Advertising in Newspapers

Total Newspaper Ad Spend Drops by 10% in September

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, mobile phone services occupied the top 2 spots during the month of September. Four banks were also part of the top 10, with an accumulated share of nearly 3%. **Tapal emerged in the number 5 spot as a result of their recent brand re-launch campaign which has seen them advertising heavily on both the print and the electronic media (for more information see page 2 on TV advertising).** However the advertising expenditure of any one item remained to be a very small fraction of total advertising revenue of newspapers.

Another interesting observation is the drop in the total print expenditure. As compared to last month the current month ad spend in newspapers dropped by 10%. An obvious reason being the September 11 incidents that rocked the US and the effects of which are ricocheting here as well. Some newspapers have registered a greater decline compared to others. For more details please contact Gallup/adtrak.

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

1	INSTA PHONE	1.6%
2	MOBILINK	1.2%
3	SAUDI PAK COMMERCIAL BANK*	0.8%
4	UNITED BANK LIMITED*	0.8%
5	ROLEX	0.6%
6	CITIBANK*	0.6%
7	TAPAL	0.5%
8	MCB*	0.5%
9	TCS	0.4%
10	SUZUKI ALTO	0.4%

* 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 Mobile Banking, etc. The same is true for the other banks listed here. For details on advertising by specific banking services contact Gallup/adtrak.

The Second Monthly Media Research Get Together

Presentation on: “A Day in the Life of Two Meter Homes”

The second meeting of the monthly Media Research Get Together was held at the Defence Club Karachi on October 23. As before there was a lively discussion among leading persons from the media and advertising community. Mansoor Khan, Head of TAM, made a presentation on, “*A Typical Day in the Life of Two Meter Homes.*” He presented ‘real polled’ data from two selected homes of the Karachi test panel, each representing a different type of viewing behavior.

Mansoor, graphically displayed the time when the TV was turned on, family members viewing at different times of the day, frequent channel surfing, scrolling through channels, total viewing time, etc. Mr. Jamil Syed, Executive Director of Pakistan Advertisers Society and Mr. Ejaz Wasay of the Marketing Association of Pakistan actively participated in the discussion. Also under discussion was the impact of the September 11 attacks in the US on worldwide advertising. Gallup/adtrak presented its September data showing a decline of 16% in TV ads and 10% in newspaper ads. The meeting was followed by extended informal conversation over a light dinner.

Gallup Announces Peoplemeter Service beginning January 2002

Gallup-Taylor Nelson Sofres has announced to make a debut of its TAM service based on the Karachi Peoplemeter data starting in January 2002. The service will provide TV viewing data, polled on a daily basis from our Peoplemeter Panel to clients - based on approximately 500 men, women and children. The panel is drawn from an extensive establishment survey carried out in Karachi during October 2001. An active marketing drive is due to be launched soon.

Arthur Andersen Representatives Begin Independent Examination of Gallup TV Ratings

As part of its policy of transparency and Quality Control, Gallup-Taylor Nelson Sofres Television Audience Measurement (TAM) will be periodically subjected to independent examination by representatives of the world’s leading consultants, Arthur Anderson Worldwide. A formal contract to this effect was signed earlier this year. The first round of the examination activities is already underway.

Company Profiles: TNS

Beginning next month we will be bringing to you profiles of advertising agencies, media planning & buying firms; in short all stakeholders in this industry will be covered. For the current Cyberletter, we are providing a brief introduction to the Gallup affiliate in UK, Taylor Nelson Sofres.

TNS, the Gallup Affiliate in UK

Taylor Nelson Sofres (TNS) is one of the world's leading market information groups. From more than 200 offices in Europe, the Americas and Asia Pacific, TNS provides continuous and custom research and analysis in over 80 countries. Its clients are most of the major Multinational corporations. Expert teams operate in specialist sectors in TNS businesses across the world. By combining in-depth market knowledge with the latest research techniques and sophisticated use of technology, it provides its clients with immediate and informed market measurement, analysis, insight and innovative business solutions.

TNS offers a portfolio of branded research products and services, providing clients with practical and internationally consistent solutions to the full range of marketing issues.

US TV Watchers More 'Sensitive'

An Internet survey on consumer attitudes and behaviors following the September 11 attack revealed that Americans have now become more sensitive to certain themes and 'storylines' in the TV programs that are being watched. 57% of the respondents indicated that they are less interested in watching shows and action/adventure programming (*like Survivor*). The effect has been particularly pronounced in the regions surrounding the attack sites.

Source: www.usatoday.com & www.adage.com

And Media Spend Drops Drastically

The U.S. media industry, already suffering through its worst recession in a decade, stands to lose up to half a billion dollars in advertising revenue as a result of recent events. Marketers have been recalling commercials from TV networks and print ads from newspapers and magazines since the crisis began on September 11. And broadcast and cable news networks have been running wall-to-wall coverage of events with no commercial breaks. Just to give an example the 3 major networks ABC, CBS and NBC are losing nearly \$100 million a day since the crisis began. Advertisers are making a conscious effort to avoid "commercialism" in the wake of a national tragedy.

Source: www.usatoday.com

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 Muhammad Salik.