

From the Editors

EID MUBARAK and HAPPY NEW YEAR

This Cyberletter provides me and our team an opportunity to send you Eid Mubarak and Happy New Year. May these occasions bring happiness, joy and satisfaction to all of us. We hope that the forth coming year will be a watershed in moving forward on Media research in general and specifically on TAM. We are actively working on Peoplemeters as announced recently and will be sharing the details with you as we go along.

The advertising revenue has dropped in recent months. It was nearly 17% lower in October compared to a year ago. But let us hope that things will move back to normal and even forward, as all crises have opportunities that come along for those who can grasp and fetch them. I propose that we make this a subject for our discussion in our next get together after Eid. Until then my best wishes and regards.

Let me also say that some of our colleagues are sending us useful ideas as well as occasional corrections. Mr. Yasir Riaz from Mindshare sent us useful ideas last month, for which we are grateful to him. We look forward to active participation from all colleagues in media and audience research.

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Study Group Session on Cable TV addressed by the then PTA Chairman Gen. Khalid Bashir



Hilal Confectionery Emerges as a Leading Advertiser

Interestingly half of the top ten advertisers in October are Food businesses. And notable among them is Hilal Confectionery whose share in TV advertising rose steadily during the last quarter.

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Ad-ex in October Lower by 17% compared to a year ago

Advertising expenditure slid further in October. The combined (rate card) value of TV and newspapers advertising in October 2001 was 17% lower compared to October 2000.

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Khabarnama regained part of its lost audience among C&S viewers during October

The PTV evening news "Khabarnama" which has lost a large majority of its audience in homes that have access to Cable and Satellite, temporarily regained part of the lost audience during the height of Afghan crisis.

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TAM NEWS

- Peoplemeters are being vigorously installed in Karachi despite logistical problems during Ramadan. The TAM team is busy in polling, data analysis and liaising with Cable operators.
- Gallup takes stock of Cable TV through the eyes of Pakistan Telecom Authority which is the national Regulatory Authority for bringing a much needed order to the proliferating world of Cable operations. A close understanding and intimate liason with Cable operators is an essential part of running a TAM service, specially in Pakistan.

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TV ADVERTISING EXPENDITURE IN OCTOBER 2001

HILAL CONFECTIONERY EMERGES AS AN IMPORTANT PLAYER

But TV Ad spend in October is lower by 17% compared to a year ago

Advertising expenditure slid further in October, reportedly because of the prevailing international crisis. The combined (rate card) value of TV and newspaper advertising in October 2001 was lower by approximately 17% compared to October 2000.

Interestingly at least half of the top ten advertisers in October are Food businesses. And notable among them is Hilal Confectionery whose share in TV advertising rose steadily during the last quarter.

Our colleague from Minshare, Yasir Riaz had sent us an observation asking for comparison with the same month in previous year. We are grateful to him for raising the issue. He also made observations about minor computation errors in the Ad spend index which have been duly rectified and are reported in this issue accordingly at page 5.

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:

		October	September	August
1	Lever Brothers	13%	16%	13%
2	Lakson Group*	13%	11%	11%
3	Procter & Gamble	11%	9%	12%
4	Hilal Confectioneries	10%	3%	**
5	Social Marketing	4%	**	**
6	Pak Tobacco Company	4%	**	3%
7	Nestle Milk Pak.	5%	6%	3%
8	Reckitt Benckiser	2%	4%	6%
9	Tapal Tea	2%	5%	**
10	EBM	2%	3%	**

* Includes Lakson Tobacco and Colgate Palmolive.

** Was not in top 10 during that month.

Note on rounding off: All figures above 2% have been rounded off to the nearest whole number. However those under 2% are reported at two decimal point level, wherever that is applicable in this Cyberletter.

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

Reporting Period: November 4-10, 2001

There is no major change in the pattern of viewing PTV programs. They received high audience among non Cable and Sat homes but the viewership dropped among Cable and Sat homes where they compete with a number of Satellite Channels. There was however a notable development. The viewership of Khabarnama picked up audience during early October through to the reporting period. Understandably this related to the prevailing international crisis and viewers concern about news. The viewership in October rose to around 30% among non C&S homes and 14% among C&S homes. Khabarnama is the principal Urdu language news available in Pakistan. Another notable event was cricket matches These were telecast during October and laso in reporting period and received high ratings comparable with top 10 programs. However because its viewership is that of a very different genre, we are not including it in the above list. A hockey match telecast in the early evening during the period also received high ratings. Same in true for some 5-minute songs. However because Khabarnama is a daily feature and cricket/hockey matches and short duration songs are telecast with no regular pattern, we are not including them in the list below.

These data refer to the time period of November 4 to 10, 2001. More recent data are also available. Those who are interested may contact Mansoor Khan or Nadim Salim at Mansoor.khan@tnsofres.com

Ratings Among

Program Name	All Homes	Non C&S Homes National	C&S Homes National	C&S Homes Karachi
Dam-e-Rasai	44	49	18	13
Chehray	41	46	16	12
Hawa Pe Raqs	40	45	15	9
Teray Siwa	39	44	14	10
Humsafar	38	43	15	13
Zaviya	38	43	16	13
Mohabbat Ka Aik Pehr	35	40	14	11
Music Time	31	35	8	11
Maa	29	33	11	3
Uljhan (Old drama)	21	23	6	6

* 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).

* If a regular program scheduled for a certain time slot is rescheduled on any one day and achieves higher rating just for that day, we do not include that in the Top 10 list.

TOP 10 BRANDS ADVERTISED in NEWSPAPERS October 2001

EDUCATION SECTOR LEADS COMMERCIAL ADVERTISING IN NEWSPAPERS

Education sector has lately emerged as a leader in commercial advertising in newspapers. It is an interesting reflection on the importance which our middle and upper class has started to give to the education of their children. At the same time it indicates the extent to which education and particularly professional education is becoming privatized and commercialized. While it may be an independent subject of discourse and debate inviting a variety of competing views, we give below some hard data on the contribution of Education sector to newspaper advertising during the month of September and October 2001.

Education Sector As a percent of Total Newspaper Advertising*

	In terms of Rupee Value (at Rate Card)	In terms of Space (Column centimeters)
October 2001	15%	11%
The total ad spend on Education was shared by various newspapers in the following ratios		
Breakdown among Leading Newspapers		
Jang	34%	35%
Dawn	21%	12%
Nawa-e-Waqt	4%	8%
Khabrain	3%	4%
All others	38%	41%
Total	100%	100%

* Based on an analysis of more than 30 newspapers and their editions

CONFECTIONERY REPLACES BANKS!

Mobile phones continued their position as leading newspaper advertisers. But advertising by banks dropped notably in October. Instead confectionery (Hilal) made significant advertising expenditure during the month.

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

1	Hilal Zoom Bubble Gum	1.41%
2	Nokia	0.91%
3	Mobilink Star	0.79%
4	Corola Diesel Car	0.65%
5	Milk Flow	0.62%
6	Rolex	0.61%
7	Tango (Paktel)	0.59%
8	Bank Alflah Anmol Deposit Certificate	0.57%
9	Insta one Card (G.S.)	0.56%
10	Super Asia	0.53%

* For the purposes of this table branded services of Banks and Mobile phones are being treated on their own as Brands. They have not been grouped under a single corporate identify.

STUDY GROUP SESSION ON CABLE INDUSTRY

Gallup Media Research Team has been taking an active interest in understanding the Cable TV industry in Pakistan. The cable operations have increasingly become a very important part of the TV scene and are hence critical for TV Audience Measurement. There is general agreement that it is still a quasi-regulated field. The number of operators are very large and many among them make abrupt changes which have an influence on Peoplemeter measurement procedures. A close liaison with local cable operators is thus essential for providing the TAM Service. A roundtable discussion on Cable TV was held earlier this year at SDPI Communication Study Group chaired by Dr. Ijaz Gilani. Gen. Khalid Bashir the then Chairman and Technical Director of Pakistan Telecom Authority (PTA) led the discussion and presented a paper on issues related to regulating the cable operations. It was attended by a select group of experts from PTV, leading cable operators, PTCL and IT industry. Gen. Bashir highlighted four problem areas: Inadequate technical knowledge of CTV operators, Overcharging, Violation of copyrights, Excessive demands by Civic/utility agencies from CTV operators. He also raised various issues concerning the prospects of multimedia services to be provided by CTV operators in the future. There was a heated debate and competing viewpoints were expressed by the participants. For more details write to Brig (R) Mohammad Yasin email: yasin@sdpi.org.

Cable TV Licenses issued by PTA as on November 30, 2001

at Karachi	375	Only 6 licenses are in the top category entitling a capacity of 200,001 subscribers and above. The majority (757) are in the lowest category of upto 1000 subscribers and the remaining are in the in-between categories.
at Lahore	344	
at Rawalpindi/Islamabad/NWFP	107	
Total	826	

These numbers indicate the place where license was issued. They do not indicate the actual place of operation. For example, the licenses issued at Karachi are mostly operated in Karachi. But a majority of those issues in Lahore are operated in cities other than Lahore. The city-wise breakdown of place of operation will hopefully be available in the next Cyberletter.

A QUICK LOOK AT COMPARATIVE ADVERTISING EXPENDITURE

Ad Spend Index for 2001 (starting from Jan 2001-Oct 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	108	100	114
October	98	94	101

Note: The figures for September have been slightly modified from those reported in Cyberletter # 3. The readers may please use the above version for future reference.

This page is devoted to introducing various media research organisations from home and abroad alongwith any of their activities which might interest our readers

UK MEDIA RESEARCH GROUP

UK Media Research Group is a not for profit organisation which promotes an understanding of the techniques and uses of media research. This is achieved through a formal programme of training, conferences and regular presentations from industry experts and through social events designed to encourage a less formal exchange of information and ideas.

The MRG aims to attract a network of members from the media, advertising and research professions from all levels of experience and knowledge.

Given below are excerpts from a recent talk to the Group by Tracy Waring, business group director at Taylor Nelson Sofres UK, affiliated with Gallup International.

Fast Marketing and Promotional Schemes

With over 60% of sales decision occurring at the point of sale, promotions can help brands double their share of the market and drive sales. "However she pointed out that the effects of promotions are short-lived, as sales often return to average or below average after the promotion period.

She explained that, according to a study of 30 major brands with large advertising budgets: "Promotions are about short term sales and don't lead to additional revenues or gains for the brand itself."

Waring went on to speak of the effectiveness of fast marketing, which combines direct marketing with intensive TV, Radio or Press advertising to provide: "Long term branding rather than short term unsustainable sales."

She said that according to a survey of 30 brands using this method, sales were sustained over a longer period and returns of the initial investment were higher. However, she pointed out that while fast marketing is effective "it is a very expensive business" and advertisers need to think carefully about what return they expect from their investment.

Letter to the Editor regarding Cyberletter # 3

Dear editor,

There is something which is misleading in this newsletter (Cyberletter # 3). The total TV spend reported for September has not decreased by 16% but by 18%. I used the AMB data of Gallup to work out the total TV spend for the month of August and September and it shows a decrease by 18.9% in September over August. Moreover one should be very careful when doing analysis and taking inferences out. The data for September should be compared to the last year corresponding month to look for deviations. If you look at the last year data (2000) there is a drop of 18.6% in September compared to August is again 18.9%. However the increase in budget of September 2001 over September 2000 has been that of 4%. So this year we have increased our spend in September. The reason for this decline is also various other factors like the seasonality of various categories which one should take into account before deriving out inferences (e.g. Soap category decreases its spend in September when compared to August and so do other lots of categories).

I thank you need to clarify this.

Have a nice day

Yasir Riaz

Head of Planning, Mindshare Pakistan

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.