

# Cyberletter Media

**July 2011 Edition: Advertising Expenditure (Adex) in Pakistan**  
Produced by: Gallup Pakistan Jointly with Gilani Research Foundation

July 2011

## In this Issue

|                                        |           |
|----------------------------------------|-----------|
| The Regulars:                          |           |
| Ad Spend Index                         | ...Page 1 |
| Top Advertisers/<br>Top Brands (TV)    | ...Page 2 |
| Top Advertisers/<br>Top Brands (Print) | ...Page 3 |

# Ad Spend Index: July 2011

\*(Based on data till July 2011)



## Methodology:

For our new readers, Ad Spend Index is an indicator of advertising activity in the country in various Media. Our cyber letter focuses on TV and Print.

Ad spend index is calculated in comparison with figures of last year. If we consider 100 as the standard advertising spend in the same month last year then the current value exceeding 100 or going below 100 shows increase or decline in the advertising spend relative to last year.

## From the Editor

Dear Reader,

We are happy to present to our readers the July Edition of Media Cyber letter focusing on the latest Ad spend trends. We look forward to your comments and feedback.

### Editorial Team:

**Babar Aziz**, Gallup Karachi  
**Fathiya Bangash**, Gallup Islamabad  
Email: [cyberletter@gallup.com.pk](mailto:cyberletter@gallup.com.pk)

### Advisory Committee:

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

## Findings: March 2011 Adex 20% lower than previous year

Advertising Expenditure in March 2011 was 20% lower from the previous year\*

TV is the primary contributor of this decrease in expenditure. It is interesting to note that this is in spite of the fact that March was the Cricket World Cup month and ad spend on Geo Super and PTV Home that covered this event increased by around 40% and 140% respectively. The drop in advertising revenue however was across 30 TV channels with some showing more than 50% decrease. This drop compared to last year in advertising revenues should be a source of concern for the industry.

| MONTH  | TOTAL | TV  | PRINT |
|--------|-------|-----|-------|
| Mar-11 | 80    | 76  | 89    |
| Mar-10 | 100   | 100 | 100   |
| Feb-11 | 100   | 96  | 112   |
| Feb-10 | 100   | 100 | 100   |
| Jan-11 | 102   | 107 | 91    |
| Jan-10 | 100   | 100 | 100   |
| Dec-10 | 97    | 98  | 93    |
| Dec-09 | 100   | 100 | 100   |

\* Considering the anomalies of rate card, the ratios may not precisely match the reality. But this should not alter the main findings from these data. TV Index is based upon terrestrial & all the leading satellite channels running Pakistani commercials.

\* Note: The inflationary impact has not been taken into account. Hence the real increase in Advertising Expenditure from 2009-2010 would be less than the nominal (unadjusted for inflation) figures.



July 2011

## The top 10 Advertisers on TV made up 59% of the Total TV Advertising Spend in March 2011

The last issue reported this figure for February. Now for March, it's 59%; showing a 3% increase. Unilever maintained its position as top of the list Advertiser in terms of its % Value Share; 14% in March 2011. Pakistan Telecommunication Company and Telenor is next in line (8%) followed by Procter & Gamble (6%).

China Mobile exhibited a slight change from 4% in February to 5% in March 2011. Almost all the top 10 Advertisers in February 2011 maintained their presence in the 'Top 10 Advertisers' category in March 2011. A shuffle can also be observed among the different companies.



**Unilever maintains its TOP POSITION as Leading TV Advertiser!**



## The TOP 10 BRANDS advertised on TV made up more than 18% of total TV advertising in March 2011

This figure for March is 2% higher than the February figure (20%).

Telenor Talkshawk is on top of the list in March with a share of 4%. Walls Ice Cream follows in second position with a share of 3%.

Ariel PRO-ZIM and Brooke Bond Supreme Tea jointly claim third position with a share of 2% each. The fourth and fifth positions are occupied by Zong (cricket ki jeet) and Mobilink Jazz Package.

Most of the brands from February 2011 did not retain their position in the top 10 brands in March 2011. Telenor continued to make it to the top 3 brands.

### TOP BRANDS

| MARCH 2011                         | Share % |
|------------------------------------|---------|
| TELENOR TALKSHAWK                  | 4 %     |
| WALLS ICE CREAM                    | 3 %     |
| ARIEL PRO-ZIM                      | 2 %     |
| BROOKE BOND SUPREME TEA            | 2 %     |
| ZONG (CRICKET KI JEET)             | 2 %     |
| MOBILINK JAZZ PACKAGE (SUCH JAZBA) | 1 %     |
| UBL OMNI                           | 1 %     |
| LUX SOAP                           | 1 %     |
| DAWLANCE H-ZONE REFRIGERATOR       | 1 %     |
| MOUNTAIN DEW                       | 1 %     |

### Top Advertisers

| February 2011                                                                           | MARCH 2011 Share%                                                                        |
|-----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| 12%   | 14%   |
| 9%  | 8%  |
| 6%  | 8%  |
| 6%  | 6%  |
| 5%  | 5%  |
| 5%  | 5%  |
| 4%  | 4%  |
| 3%  | 3%  |
| 3%  | 3%  |
| 3%  | 3%  |

\*Govt. of Pakistan has been excluded from the commercial top ten advertisers' ranking. In-house advertising by Newspapers and TV channels have also been excluded from the list of top 10 advertisers.

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

**Disclaimer:** Gallup Pakistan is not related to Gallup Inc. headquartered in Washington D.C. USA. We require that our surveys be credited fully as Gallup Pakistan (not Gallup or Gallup Poll). We disclaim any responsibility for surveys pertaining to Pakistani public opinion except those carried out by Gallup Pakistan, the Pakistani affiliate of Gallup International Association. For details on Gallup International Association see website: [www.gallup-international.com](http://www.gallup-international.com)

# PRINT\* March 2011



July 2011



**The TOP 10 Advertisers in Print Media make up over 12% of the Total Print Advertising in March 2011**



HBL maintained its first slot in March 2011.

The remaining 9 brands followed by contributing 1% share each to the advertising budget in March 2011.

Haier, Warid, Bank Al-Falah, Standard Chartered Bank are the new entrants in this month's Top Ten Advertisers in the Print.

**The TOP 10 brands advertised in Print made up almost 20% of the total Print Advertising in March 2011**

The brand that dominated in March 2011 was Habib Bank Limited (3%) followed by National Bank Of Pakistan (%). The rest of the brands also contributed 1% share of the total print advertising.

| Top Brands                   |         |
|------------------------------|---------|
| MARCH 2011                   | % Share |
| HABIB BANK LIMITED           | 3%      |
| NATIONAL BANK OF PAKISTAN    | 1%      |
| MOBILINK JAZZ PACKAGE        | 1%      |
| ALLIED BANK LIMITED          | 1%      |
| HAIER Electronics            | 1%      |
| ROYAL FAN                    | 1%      |
| WARID TELECOM                | 1%      |
| BANK ISLAMI PAKISTAN LIMITED | 0.49    |
| CANYON VIEWS                 | 0.48    |
| SAMSUNG MOBILE               | 0.43    |

| Top Advertisers      |  |                    |  |
|----------------------|--|--------------------|--|
| February 2011 Share% |  | MARCH 2011 Share%4 |  |
| 4%                   |  | 3%                 |  |
| 2%                   |  | 1%                 |  |
| 2%                   |  | 1%                 |  |
| 1%                   |  | 1%                 |  |
| 1%                   |  | 1%                 |  |
| 1%                   |  | 1%                 |  |
| 1%                   |  | 1%                 |  |
| 1%                   |  | 1%                 |  |
| 1%                   |  | 1%                 |  |
| 1%                   |  | 1%                 |  |

\*Govt. of Pakistan has been excluded from the commercial top ten advertisers' ranking. In-house advertising by Newspapers and TV channels have also been excluded from the list of top 10 advertisers. The individual figures above are not very prominent due to the fact that Classified and Government advertising enjoy the lion's shares, leaving the rest with relatively meager portions. 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.

**Disclaimer:** Gallup Pakistan is not related to Gallup Inc. headquartered in Washington D.C. USA. We require that our surveys be credited fully as Gallup Pakistan (not Gallup or Gallup Poll). We disclaim any responsibility for surveys pertaining to Pakistani public opinion except those carried out by Gallup Pakistan, the Pakistani affiliate of Gallup International Association. For details on Gallup International Association see website: [www.gallup-international.com](http://www.gallup-international.com)

# **Cyberletter** Media

**July 2011 Edition: Advertising Expenditure (Adex) in Pakistan**  
Produced by: Gallup Pakistan Jointly with Gilani Research Foundation

July 2011

Please send all correspondence to:

Media Cyberletter Editorial Team,

Email: [cyberletter@gallup.com.pk](mailto:cyberletter@gallup.com.pk)

Join us on **Facebook**



and

**Blog**



**A year to thank,  
share and reinvent  
Gallup & Gilani: 1980-2010**



**Disclaimer:** Gallup Pakistan is not related to Gallup Inc. headquartered in Washington D.C. USA. We require that our surveys be credited fully as Gallup Pakistan (not Gallup or Gallup Poll). We disclaim any responsibility for surveys pertaining to Pakistani public opinion except those carried out by Gallup Pakistan, the Pakistani affiliate of Gallup International Association. For details on Gallup International Association see website: [www.gallup-international.com](http://www.gallup-international.com)