

Cyberletter Media

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

September 2011

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Ad Spend Index: 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.

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Findings: July 2011 Adex 4% higher than previous year

Advertising Expenditure in July 2011 was 4% higher from the previous year*

The Print Adex for July was 2% higher than the same month in the previous year. In month of July the Advertising Expenditure in the country has increased significantly since the drop observed in June 2011.

MONTH	TOTAL	TV	PRINT
Jul-11	104	104	102
Jul-10	100	100	100
Jun-11	94	95	91
Jun-10	100	100	100
May-11	110	119	85
May-10	100	100	100
Apr-11	92	93	90
Apr-10	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.



September 2011

The top 10 Advertisers on TV made up 54.26% of the Total TV Advertising Spend in JULY 2011

The last issue reported this figure for March. Now for July, it's 54.26%; showing a 4.74% decrease. Unilever maintained its position as top of the list Advertiser in terms of its % Value Share; 18.73% in July 2011. Pakistan Telecommunication Company 9.09% followed by Telenor (5.12%) and Proctor & Gamble (5.07%).

China Mobile exhibited a slight change from 3.28% in June to 2.14% in July 2011. Almost all the top 10 Advertisers in June 2011 maintained their presence in the 'Top 10 Advertisers' category in July 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 18.35% of total TV advertising in JULY 2011

This figure for July is 0.52% lower than the June figure (18.87%).

Telenor Easypaisa is on top of the list in July with a share of 2.96%. UFONE follows in second position with a share of 2.43%.

VIM dish wash bar claim third position with a share of 1.96% followed by Zong 100 pe 100 with a share of 1.89%. The fifth and sixth positions are occupied by Mega Mall and UFONE UTH Package.

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

TOP BRANDS

JULY 2011	Share %
TELENOR EASYPAlSA	2.96 %
UFONE	2.43 %
VIM DISHWASH BAR	1.96 %
ZONG 100 PE 100 OFFER	1.89 %
MEGA MALL	1.63 %
UFONE UTH PACKAGE (CHAMPION OFFER)	1.60 %
UFONE (49 PAISA/ 30SEC ALL NETWORK)	1.54 %
Q MOBILE E 500	1.47 %
MEGA GATE MOBILES	1.45 %
VASELINE INTENSIVE CARE	1.42 %

Top Advertisers

JUNE 2011	JULY 2011 Share%
14.42% 	18.73% 
7.86% 	9.09% 
5.35% 	5.12% 
5.09% 	5.07% 
5.09% 	3.03% 
4.61% 	2.97% 
3.69% 	2.72% 
3.42% 	2.71% 
3.28% 	2.68% 
3.23% 	2.14% 

*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.

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September 2011

PRINT*

JULY 2011



The TOP 10 Advertisers in Print Media make up over 9.04% of the Total Print Advertising in JULY 2011

PTCL maintained its first slot in July2011.

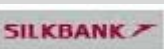
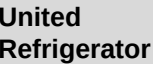
Silk Bank and Al-Meezan Bank, are the new entrants in this month's Top Ten Advertisers in the Print.

The TOP 10 brands advertised in Print made up almost 7.29% of the total Print Advertising in JULY 2011

The brand that dominated in July 2011 was Bank Al Habib Limited (1.26%) followed by Bahria Town (0.93%).

Top Brands	
JULY 2011	% Share
BANK AL HABIB LIMITED	1.26%
BAHRIA TOWN	0.93%
SILK BANK	0.82%
UFONE	0.75%
PTCL	0.66%
ZONG	0.65%
AL-MEEZAN BANK	0.62%
SAFE GUARD SOAP	0.57%
HABIB BANK LIMITED	0.56%
KASB BANK LIMITED	0.47%

Top Advertisers

JUNE 2011 Share%		JULY 2011 Share%	
2.86%		1.93%	
1.08%		1.26%	
0.88%		1.11%	
0.85%		0.82%	
0.81%		0.80%	
0.62%		0.68%	
0.56%		0.65%	
0.51%		0.63%	
0.49%		0.62%	
0.43%		0.54%	

*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.

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



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