

From the Editors

**CAN WE LOOK FORWARD TO A
HAPPY NEW YEAR?**

Every year the Gallup International conducts a world wide survey on Perceptions about the forthcoming year to measure the degree of hope and despair among various nations across the globe. Interestingly Pakistanis generally turn out to be a people with hope. Their hope level has risen and declined in various years. But it is rarely out of the league of hopeful nations. This year again 43% of Pakistanis said they are hopeful that the new year will be better than the previous one, 29% said they expected it to be worse, while 15% thought things would remain unchanged. Another 13% found themselves unable to give a response. Among the 60 countries sampled in this global survey, Pakistan shared the 15th position on the hope ladder. **So, hopefully we can look forward to a happy new year! Best wishes to you and your families.**

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BBSS-Gallup-Taylor Nelson Sofres is working actively on the Pakistan project. Photo from a recent meeting with the team in Sofia in December 2001. Engineer Genchev, (second from left in first row) and Engineer Alex (second from left in second row) have both visited Pakistan and were reported in our previous newsletters.

P&G Ahead of Levers in November

After leading the advertising expenditure list for all previous months in the year, Levers slid to position number 2 in November. Procter and Gamble moved to the top position accounting for 13% of the total TV ad spend during the month.

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Does Ramadan affect TV Viewership

The subject may require more research and from several different angles, but there are some interesting hypotheses which emerge from reading data on top 10 PTV programs. Apparently some viewers are lost during Ramadan and others are gained and thus the net viewership size is maintained. However the differences between the viewership patterns of cable and non cable homes are less sharp during Ramadan compared to other months.

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Star Plus Tops in 'Reach'

Star Plus was ahead of all foreign channels among C&S viewers in December 2001.

See details on page 3

TAM NEWS HIGHLIGHTS

- Taylor Nelson Sofres named market research agency of the year.
- Mansoor Khan works on carrying out a "Coincidental Study" for TV Audience Panel in China.
- Andersen Worldwide representatives have completed phase one of auditing the Gallup Television Ratings Service
- Gallup-TNS Peoplemeter project is now polling viewing data for more than 250 TV viewers of Karachi on a daily basis. Details to follow in the next issue. The service begins in January 2002.

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TV ADVERTISING EXPENDITURE IN NOVEMBER 2001

P&G WAS AHEAD OF LEVERS IN NOVEMBER

After leading the advertising expenditure list for all previous months in the year, Levers slid to position number 2 in November. Procter and Gamble moved to the top position accounting for 13% of the total TV ad spend. Apparently tobacco advertising drops in Ramadan (which began in middle of November) accounting for a decline in the share of Lakson Group and the absence of Pakistan Tobacco among the top 10 advertisers. Also notable is that advertising was more spread out across multinational and national companies in November. Moreover the share of top 10 advertisers among total TV ad spend dropped significantly from an average of 60% to around 46% in November, showing greater dispersion.

It is also notable that TV Ad spend in November is lower by 21% compared to a year ago.

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:

		November	October	September	August
1	Procter & Gamble	13%	11%	9%	12%
2	Lever Brothers	9%	13%	16%	13%
3	Lakson Group*	7%	13%	11%	11%
4	Nestle Milkpak	4%	5%	6%	3%
5	Hilal Confectioneries	3%	10%	3%	**
6	Maskatiya Industries Limited	2%	**	**	**
7	Habib Oil Mills	2%	**	**	**
8	Tapal Tea	1.9%	2%	5%	**
9	National Food	1.79%	**	**	**
10	Pepsi Cola International	1.79%	**	**	**

* 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: December 2-8, 2001

DOES RAMADAN AFFECT TV VIEWERSHIP?

It is interesting to note that the size of viewership of leading TV programs during Ramadan is about the same as in previous months. It is quite possible that while some men were away during Ramadan evenings to say 'Tarawih' prayers, others found fewer social occasions to be out of home during the same time and decided to sit around with the family and watched TV in what were fairly cold evenings in most of the country. Thus there was no significant change in the net size of viewership.

The data for first week of December which fell during Ramadan suggests that some of the Cable and Sat homes decided to watch PTV drama in the evening which they normally did not in other months. The difference between the viewing patterns of cable and non cable homes remained quite wide, but it was less sharp during Ramadan compared to other months.

These data refer to the time period of December 2 to 8, 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
	Sawan	46	51	24
Teray Aa Janay Say	42	47	21	14
Chehray	39	42	26	16
Hawa Pey Raqs	38	41	22	14
Teray Siwa	38	41	20	14
Comedy Theatre	37	40	23	13
Mohabbat Ka Aik Pehr	37	40	22	15
Music Time	36	39	22	10
Maa	32	34	21	9
Music Files	29	30	22	7

* 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.

STAR PLUS TOPS IN 'REACH' AMONG C&S VIEWERS IN DECEMBER 2001

According to Gallup TV Ratings, among the C&S viewers the satellite channel Star Plus had a daily average reach of close to twice the reach of Zee TV or Sony during December 2001. The viewership of leading foreign channels underwent wide changes during the second half of the year. During this period all three of them went through a process of going off air for brief duration for reasons of switching to decoders and licensing process. Only Star Plus obtained a formal license and achieved channel availability level equivalent to the other two albeit with a competitive transmission quality due to formal licensing. Interestingly as the year comes to a close tensions between Pakistan and India have resulted in governmental instructions in the two countries to prohibit their cable operators from showing each others channels. It would be of interest to see its impact on viewership.

HEALTHCARE SECTOR IS A PROMINENT NEWSPAPER ADVERTISER

According to Gallup/adtrak data for November 2001, healthcare sector is a prominent newspaper advertiser. It accounted for a little more than 5% of the total value of advertising in leading newspapers in the country. Leaving out classified ads, tenders and government advertising as a separate category, this was the second largest sector in November, second only to Education and ahead of the financial sector. The healthcare sector includes traditional medicine ads and diagnostic laboratories as well as hospital ads. For more details please contact the Editors of Cyberletter.

AKHBAR-E-JAHAN TOPS MAGAZINES IN ADVERTISING REVENUE

The Gallup/adtrak data for November 2001 shows the following five Magazines as the leading attraction for advertisers. The list is topped by Akhbar-e-Jahan which alone accounts for around one third of the revenue earned by the weekly and monthly magazines in the country (on rate card basis):

1. Akhbar-e-Jahan
2. Family Magazine
3. Friday Times
4. Herald
5. Newslines

AD SPEND INDEX 2001

A quick look at comparative advertising Expenditure

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
November	100	102	98

TAYLOR NELSON SOFRES NAMED MARKET RESEARCH AGENCY OF THE YEAR

Taylor Nelson Sofres (TNS) one of the largest marketing information group in the world - has received Marketing magazines' Agency 2001 award for Market Research Agency of the Year.

The Agency 2001 awards recognise excellence within each key marketing discipline, including media, design, telemarketing, PR and market research. Entries were assessed according to a range of criteria including creativity, effective and efficient client service and innovative product development.

Tony Cowling, Chairman Taylor Nelson Sofres commented: "2001 has been an extremely positive year for TNS and we are delighted to be named Market Research Agency of the Year. This award is an important recognition of our teams. We remain committed to developing and improving our services during the next 12 months to maintain our position as a market leader".

COINCIDENTAL STUDY PLANNED BY CSM IN CHINA

CSM, CVSC Sofres Media, is the leader in TV audience measurement in China, combining advanced technology with proven research methodologies. CSM is a joint venture between Central Viewer Survey and Consulting Centre (CVSC) and Taylor Nelson Sofres (TNS), a world leader in market research and TAM.

China, it should be mentioned has the world's largest television viewing population. It has over one billion viewers and more than 3,000 television channels spanning a large number of languages and dialects across the great Chinese land mass.

Currently CSM runs the world's largest TAM panel of over 20,000 TV homes, measured through a combination of peplemeters and diaries. Mansoor Khan who heads TAM in Pakistan, works actively with CSM and provides consultancy on all aspects of running a world class TAM service there. Currently Mansoor is planning and organising the carrying out of a Coincidental study for CSM.

Coincidental Study is an international standard and is stipulated in "Towards Global Guidelines for Television Audience Measurement". This reference document is widely considered the de facto standard on TAM.

The main purpose of a Coincidental Study is to monitor the validity of the measurement system and panel performance. The object is to establish whether at particular selected times on particularly selected days the system is delivering a valid measurement of the TV audience.

ANDERSEN REPRESENTATIVES COMPLETE PHASE ONE OF AUDIT

Andersen Worldwide representatives have completed phase one of auditing the Gallup Television Ratings Service. The second phase is due to begin in January 2002. Further details will follow in forthcoming issues of the Cyberletter.

TAM PAKISTAN

Gallup-TNS Peplemeter project is now polling viewing data for more than 250 TV viewers of Karachi on a daily basis. Details to follow in the next issue. The service begins in January 2002.

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 Nadim Salim, 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.