

From the Editors

New year started with a bang! Political disturbance caused lots of upheavals in the media, it not only disturbed the peace in the country but also the privacy of the living rooms. Television Viewing showed some very interesting changes after the shut down of foreign channels.

Power tussle is also hot amongst the few multinational giants, who takes the lead in the spending race is revealed in our inclusive coverage. In every news letter we try to update you by disclosing little facts & figures that are directly or indirectly related to us or are there just for the sake of information. That's why we see you every month i.e. to keep you informed.

Happy Viewing!!!

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Sarwar, Stefan and
Mehmood working
on TAM Software

Roumena, Sarwar and
Mehmood working on
Consumer Panel Software



Sarwar Kazim & Mahmood Akhter of Gallup Pakistan actively participating in the special training program arranged by BBSS-Gallup International in Sofia, during the last week of January 2002.

All year data for 2001 TOP 3 DOMINATING TV ADVERTISING

Levers, P&G & Lakson Group accounted for more than one third (36%) of total TV ad spend during the year 2001.

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NESTLE CLIMBS THE TV ADVERTISERS LADDER IN DECEMBER 2001

The last month of the year 2001 saw Nestle Pakistan as a prominent advertiser on TV.

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Among Cable Homes PTV DRAMA SERIALS RECOVER VIEWERSHIP

Among Cable Homes PTV drama serials recover viewing during ban on Indian channels.

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TAM NEWS

- As various channels enter new market segments each with its own profile and purchasing power. Connoisseurs of ratings data may like to turn to their computers and spend an interesting time seeking competitive advantage.
- The Peoplemeter Panel in Karachi is now polling around 400 panel members every day and producing interesting ratings. The disruption on the cable TV scene has however created an abnormal situation and TAM has been advised to wait for one or two weeks to allow for normalization of the viewing scene. So, please bear with us until then.

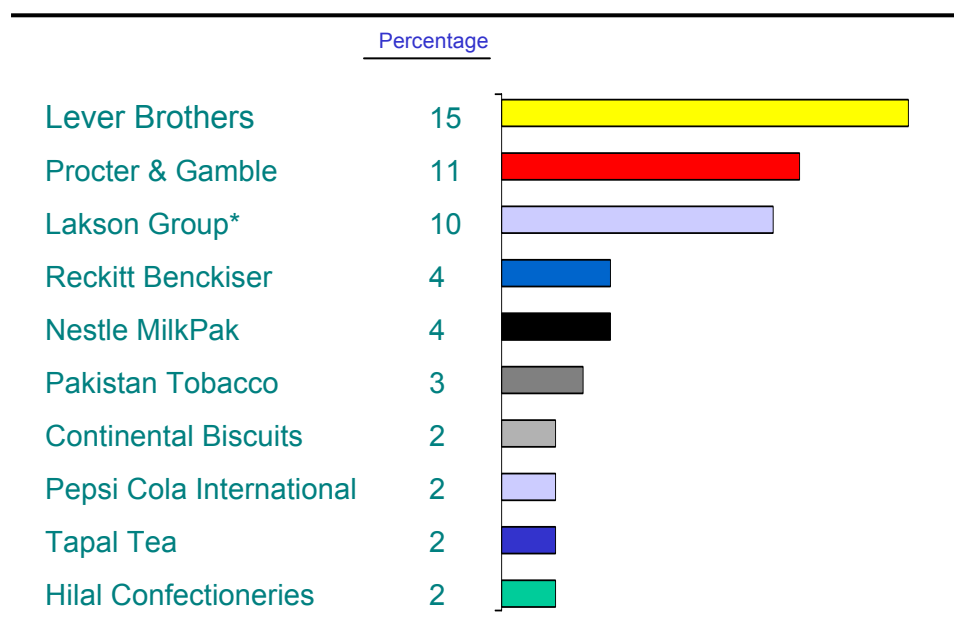
..... See details on page 5

TOP 3 ADVERTISERS CONTRIBUTED ONE THIRD OF TV AD SPEND DURING 2001

According to the Gallup/adtrak data computed for the whole year of 2001, the top 3 advertisers, Levers, P&G and Lakson Group accounted for more than one third (36%) of total TV ad spend during the year. Interestingly most of the top 10 advertisers are either wholly or partially in the food business. Six of the top 10 are multinationals.

Levers was number one for the year 2001 on the whole accounting for over 15% of total TV spend P&G was the runner up at 11% and Lakson Group stood third at 10%. The top 10 accounted for 54% of total TV advertising expenditure during the year.

TOP TEN TV ADVERTISERS DURING 2001 (January-December 2001)



* Includes Lakson Tobacco and Colgate Palmolive.

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.

TV ADVERTISING EXPENDITURE IN DECEMBER 2001

NESTLE CLIMBS THE TV ADVERTISERS LADDER IN DECEMBER

The last month of the year 2001 saw Nestle Pakistan as a prominent advertiser on TV. It was number 2 after Levers and contributed 8% to the ad spend on TV during the month of December 2001.

TOP 10 TV ADVERTISERS

Percent share in advertising value:

| | December | November | October |
|-----------------------|----------|----------|---------|
| Lever Brothers | 9 | 9 | 13 |
| Nestle | 8 | 4 | 5 |
| Lakson Group* | 5 | 7 | 13 |
| Procter & Gamble | 5 | 13 | 11 |
| Pepsi Cola | 2 | 1.79 | -- |
| Habib Oils | 2 | 2 | -- |
| Novartis | 2 | -- | -- |
| Hilal Confectionaries | 1.9 | 3 | 10 |
| Aventis | 1.8 | -- | -- |
| Servis Industries | 1.7 | -- | -- |

* Includes Lakson Tobacco and Colgate Palmolive.

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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 |
| December | 110 | 128 | 98 |

AUDIENCE OF TOP 10 OF PTV AMONG SAT & NON-SAT HOMESReporting Period: 30th Dec.2001 to 5th Jan, 2002**AMONG CABLE HOMES PTV DRAMA SERIALS RECOVER VIEWING DURING BAN ON INDIAN CHANNELS**

During the first week of the new year, PTV drama serials gained notable recovery in their viewing among homes with cable TV. As the Government banned cable operators from carrying Indian channels, the viewers were restricted to fewer choices. The following table is illustrative of that change. While in an average month PTV drama serials fetched a rating of around 15% among Cable and Sat homes, it rose to well above 25% in most cases, during the first week of January.

Ratings Among

| Program Name | All Homes | Non C&S Homes National | C&S Homes National | C&S Homes Karachi |
|----------------------|-----------|------------------------|--------------------|-------------------|
| Safar | 48 | 50 | 31 | 22 |
| Sawan | 47 | 50 | 29 | 22 |
| Wafa ka Mousam | 43 | 46 | 25 | 28 |
| Saza aur Jaza | 43 | 45 | 27 | 17 |
| Mohabbat Ka Aik Pehr | 42 | 44 | 28 | 16 |
| Doosri Aurat | 41 | 42 | 30 | 22 |
| Hawa Pe Raqs | 40 | 42 | 27 | 18 |
| Music Time | 40 | 42 | 24 | 12 |
| Music File | 31 | 34 | 16 | 23 |
| Zaviya | 29 | 30 | 19 | 22 |

AN ERROR REGRETTE

Due to transcription error on the part of Gallup its TV Ratings Report pertaining to December 26, reported that **Doosri Aurat** was aired at **8pm** and gave its rating. Instead the drama which was aired during that time slot was **Teray Siwa**. The error has now been corrected for the benefit of its media planning clients who receive data in electronic form. Despite the vast size of programme transcription, Gallup is committed to make every effort to minimize such errors. The error is greatly regretted.

* 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.

For the sophisticated ratings watchers

HOW TO COMPARE VIEWER PREFERENCES FOR PTV, PRIME TV and SAT CHANNELS

The sophisticated ratings watcher makes an important distinction between “the size of audience” and “viewer preferences”. For the study of viewer preferences it is useful to make what may be called “apple to apple” comparisons. For example viewer preference among terrestrial and satellite channels should be made in homes, which have access to both. The comparisons between PTV, PTV World and Prime terrestrial channels should also be made in homes, which have access to various channels being compared. Gallup Media data is therefore available to its clients in such a way that they can define a segment and then look at the comparison within that segment of TV transmission.

As an illustration, the ratings for various **satellite channels** rise in relative terms when these are measured for homes with access to cable and satellite dishes. The ratings for **Prime TV**, which is available in major urban areas (and their peripheries) also rise when its comparisons are restricted to those areas, constituting roughly half of the TV viewing population. Since Prime TV is available in the evenings only its ‘apple to apple comparison’ in terms of reach is also better understood when the comparison is restricted to those hours.

The connoisseurs of ratings data may like to turn to their computers and spend an interesting time seeking competitive advantage, as various channels enter different market segments, each with its own profile and purchasing power.

TAM NEWS

Over 400 men, women and youth in Karachi are now going through a novel experience. Every time they decide to watch TV they press on to a handset lying nearby. They press it off when they stop watching. Thus as they surf through or watch various channels, the information gets recorded. Every night the data are polled at Gallup office. A Quality Control department overseen by Head of TAM makes a list of all homes where telephone problems obstructed the polling of data. As days pass by most Panel members it seems, have started to enjoy this new little preoccupation. On occasions they call up on their own interest to inform about any glitches and invite the TAM technicians to visit their homes for error correction. It is an exciting as well as learning experience for both the TAM team and it appears for the panel members. There is unfortunately a recent disturbance in the channel maps (as they are called in the TAM language) due to the ban on cable operators to run various Indian channels. As soon as this situation normalizes TAM will share the Peoplemeter findings with the industry.

Advertising Industry in the UK A YOUTHFUL PROFILE!

For the interest for our readers we are reproducing below excerpts from an annual census of UK advertising agencies.

Under-Thirties Continue to Dominate UK Agencies

As at September 1 last, 14,000 individuals were employed in IPA member advertising agencies – 49% of whom were aged under thirty and 81% under forty, according to the *IPA Agency Census 2001*, published by **Britain's Institute of Practitioners in Advertising**.

The census also reflected downsizing among UK agencies, with the average agency headcount slipping year-on-year to 67 from 69.

Other key data emerging from the study are:

- **Geographic Spread**

Fifty eight percent (58%) of total IPA shops are based in London and account for 78% of total staff; 42% of IPA member companies are based in the North West, Scotland and the Midlands and account for 22% of total staff.

- **Gender Scene**

Women make up 49% of the industry, 23% of board directors and 12% of chairman/ceo/managing directors; 16.6% of women are involved within creative departments.

- **Creative vs Suits**

Twenty six percent (26%) of the employed base are involved in the creative function of their agencies, while 23% are involved in account handling and 16% in media departments.

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.