

MEDIA ADVERTISING SPEND

TOTAL ADVERTISING SPEND

July 1, 2009 to June 30, 2010

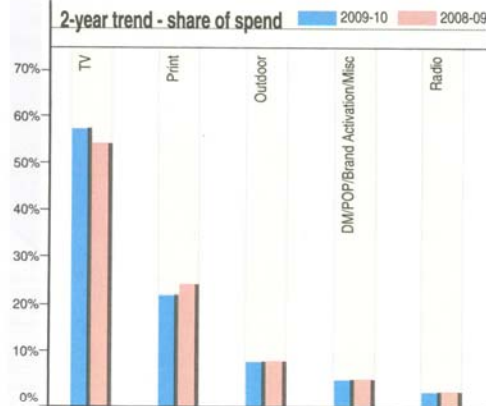
Data provided by **Gallup**

FY 2009-10

Media	Rs. (bn)	% share	% change from last FY
TV*	17.29	57	17 ↑
Print*	7.31	24	4 ↑
Outdoor**	2.60	9	5 ↑
DM/POP/Brand Activation/ Misc**	1.70	6	9 ↑
Radio**	1.18	4	9 ↑
Total	30.08	100	12 ↑



2-year trend - share of spend



OVERVIEW

- Total ad spend (revenue) has increased by 12% (from Rs 26.96 billion to Rs 30.08 billion).
- TV ad spend (revenue) has increased by 17% (from Rs 14.80 billion to Rs 17.29 billion). This increase is not nearly as significant as the 55% revenue increase in FY 2008-09. In terms of overall share of spend, TV has increased by 2% (from 55% to 57%).
- Print ad spend (revenue) has increased by 4% (from Rs 7.04 billion to Rs 7.31 billion). Although this is a low increase, it is substantially better than the print media's 16% decrease in FY 2008-09. In spite of this, print has still not been able to regain its position of FY 2007-08 when revenue was Rs 8.16 billion. In terms of overall share of spend, print has decreased by 2% (from 26% to 24%).
- Outdoor ad spend (revenue) has increased by 5% (from Rs 2.48 billion to Rs 2.60 billion). In terms of overall share of spend, outdoor has retained its position at 9%.
- Direct marketing ad spend (revenue) has increased by 9% (from Rs 1.56 billion to Rs 1.70 billion). In terms of overall share of spend, direct marketing has retained its position at 6%.
- Radio ad spend (revenue) has increased by 9% (from Rs 1.08 billion to Rs 1.18 billion). In terms of overall share of spend, radio has retained its position at 4%.

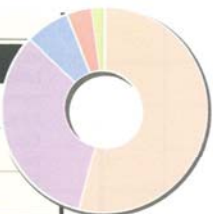
*A 65% discount has been applied on the rate card.

**Outdoor, direct marketing and radio are not systematically tracked by Gallup, therefore educated estimates by industry experts have been used to arrive at these figures.

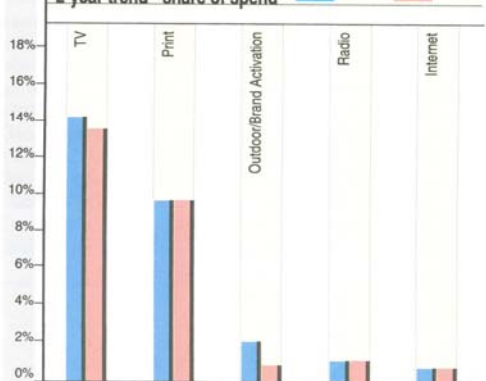
Data provided by **AURORA**

FY 2009-10

Media	Rs. (bn)	% share	% change from last FY
TV	14.56	54	9 ↑
Print	8.98	33	1 ↓
Outdoor/ Brand Activation	2.00	7	166 ↑
Radio	1.04	4	No change
Internet	0.42	2	11 ↑
Total	27.00	100	10 ↑



2-year trend - share of spend



OVERVIEW

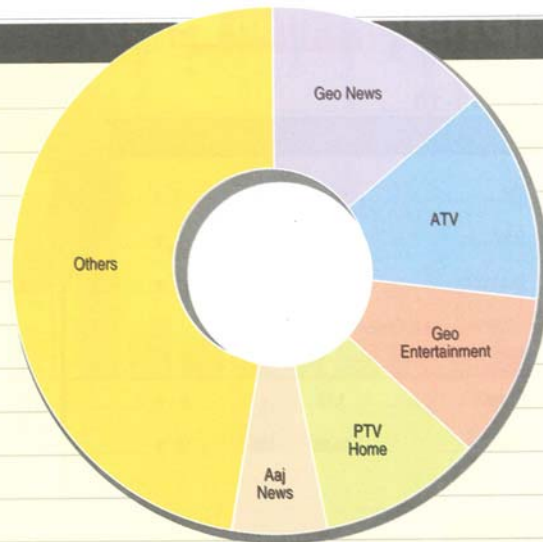
- Total ad spend (revenue) has increased by 10% (from Rs 24.63 billion to Rs 27.00 billion).
- TV ad spend (revenue) has increased by 9% (from Rs 13.37 billion to Rs 14.56 billion). This is considerably lower than the 14% increase in FY 2008-09 and the 28% increase in FY 2007-08. In terms of overall share of spend, TV has retained its share at 54%.
- Print ad spend (revenue) has decreased by 1% (from Rs 9.09 billion to Rs 8.98 billion). This is significantly lower than the 9% decrease in FY 2008-09 and could signal to some measure of recovery in 2010-11. In terms of overall share of spend, print has decreased by 4% (from 37% to 33%).
- Outdoor ad spend (revenue) – which also includes brand activation – has increased by a record 166% (from Rs 0.75 billion to Rs 2.00 billion). This increase is in large part due to a greater focus on brand activation. In terms of overall share of spend, outdoor has increased by 4% (from 3% to 7%).
- Radio ad spend (revenue) has shown no change in the last FY and remains at Rs 1.04 billion. In terms of overall share of spend, radio has retained its position at 4%.
- Internet ad spend (revenue) has increased by 11% (from Rs 0.39 billion to Rs 0.42 billion). In terms of overall share of spend, internet has increased by a record 9% (from 2% to 11%).

NB. These figures have been compiled by Aurora in consultation with MediaBank for TV; and various industry experts for print, radio, outdoor/brand activation and the internet.

TV SPEND BREAKUP

Data provided by **Gallup**

TV Channel	Rs. (bn)	% share
Geo News	2.405	14
ATV	2.195	13
Geo Entertainment	1.696	10
PTV Home	1.654	10
Aaj News	0.970	6
Hum TV	0.918	5
KTN	0.886	5
TVOne	0.745	4
Cartoon Network	0.639	4
ARY Digital	0.537	3
Indus Vision	0.400	2
CNBC Pakistan	0.386	2
Apna	0.384	2
PTV News	0.269	2
Express News	0.285	2
Ten Sports	0.253	1
DawnNews	0.240	1
Dunya News	0.232	1
ARY News	0.211	1
Sindh TV	0.181	1
Geo Super	0.166	1
MTV Pakistan	0.159	1
AVT Khyber	0.159	1
Play	0.155	1
HBO	0.147	1
Aag	0.139	1
Filmazia	0.133	1
ARY Zauq	0.127	1
ARY QTV	0.126	1
Samaa	0.126	1
Business Plus	0.112	1
Masala	0.083	0
Rohi	0.072	0
ARY Musik	0.069	0
Wikkid Plus	0.017	0
Indus News	0.016	0
Total	17.29	100



OVERVIEW

1. TV ad spend (revenue) has increased by 17% (from Rs 14.80 billion to Rs 17.29 billion). In terms of overall share of spend, TV has increased by 2% (from 55% to 57%).
2. Satellite channels account for 76% (Rs 13.173 billion) of spend, whereas terrestrial channels account for 24% (Rs 4.118 billion) of spend. Last year satellite channels accounted for 74% of total TV spend whereas terrestrial channels accounted for 26%.
3. Satellite channels' ad spend (revenue) has increased by 20% (from Rs 11.02 billion to Rs 13.173 billion). In terms of overall share of spend for TV, satellite channels have increased from 74% to 76%.
4. Terrestrial channels' ad spend (revenue) has increased by 9% (from Rs 3.78 billion to Rs 4.118 billion). In terms of overall share of spend for TV, terrestrial channels have decreased from 26% to 24%.
5. Geo News has taken the top spot from PTV Home. Its revenue has increased from Rs 1.750 billion to Rs 2.405 billion). PTV Home, which was previously in the top spot has slid down to fourth place with revenue decreasing from Rs 2.002 billion to Rs 1.654 billion.
6. The top five TV channels account for 53% of the total ad spend (revenue) on television.

NB:

1. Gallup has applied a discount rate of 65% on the rate card.
2. Gallup ad spend estimates are exclusive of any taxes but include agency commission.
3. Scrolls, animations, logos, backdrops, window ads etc., have been included in the Gallup data.
4. Gallup has included the ad spend of TV Channels which advertise in print.

PRINT SPEND BREAKUP

Data provided by **Gallup**

Newspapers

Newspaper	Rs. (bn)	% share
Jang	2.434	34
DAWN	1.554	21
Express	0.784	11
The News	0.695	10
Nawa-i-Waqt	0.654	9
Khabrain	0.300	4
Business Recorder	0.224	3
The Nation	0.139	2
The Daily Times	0.096	1
Pakistan	0.052	1
Din	0.047	1
Asas	0.044	1
Other newspapers	0.125	2
Total	7.148	100



OVERVIEW

1. Print ad spend (revenue) has increased by 4% (from Rs 7.04 billion to Rs 7.31 billion). In terms of overall share of spend, print has decreased by 2% (from 26% to 24%).
2. Newspapers account for 98% (Rs 7.148 billion) of total print spend (revenue), while magazines account for 2% (Rs 0.162 billion). This bifurcation remains unchanged from last year.
3. Newspapers' ad spend (revenue) has increased by 4% (from Rs 6.887 billion to Rs 7.148 billion). In terms of overall share of spend, newspapers have retained their position at 98%.
4. Magazines' ad spend (revenue) has increased by 6% (from Rs 0.153 billion to Rs 0.162 billion). In terms of overall share of spend, magazines have retained their position at 2%.
5. *Jang* is in the top spot once again with revenues increasing from Rs 2.313 billion to Rs 2.434 billion.

NB

1. Gallup has applied a discount rate of 65% on the rate card.
2. Gallup ad spend estimates are exclusive of taxes but include agency commission.
3. Logos, backdrops, window ads etc., have been included in the Gallup data.
4. Gallup data includes ad spend for TV channels which advertise in print.

Magazines

Magazine	Rs. (bn)	% share
Akhbar-e-Jahan	0.079	48
Mag	0.026	16
Family Magazine	0.022	14
Herald	0.016	10
Friday Times	0.009	6
Newsline	0.007	4
Other magazines	0.003	2
Total	0.162	100



Data compiled by **AURORA**

Newspapers

Newspaper	Rs. (bn)	% share
Jang	2.861	34
DAWN	1.700	20
The News	0.657	8
Nawa-i-Waqt	0.580	7
Express	0.450	5
Khabrain	0.270	3
Business Recorder	0.250	3
Kawish	0.240	3
Daily Times	0.170	2
Pakistan	0.140	2
The Nation	0.100	1
Din	0.075	1
Ibrat	0.060	1
Awaz	0.047	1
Awam	0.044	1
Waqt	0.023	0
Inquilab	0.002	0
Daily News	0.001	0
Others	0.600	7
Total	8.270	100

