

# MEDIA Advertising Spend

## TOTAL ADVERTISING SPEND

Data provided by **Gallup Pakistan**



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

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

### OVERVIEW

**Total ad spend (revenue) has increased by 7% (from Rs 30.08 billion to Rs 32.06 billion), which is significantly lower than last year's increase of 12%. This increase is shared by TV and radio, while print, outdoor and direct marketing/brand activation show a decline in FY 2010-11.**

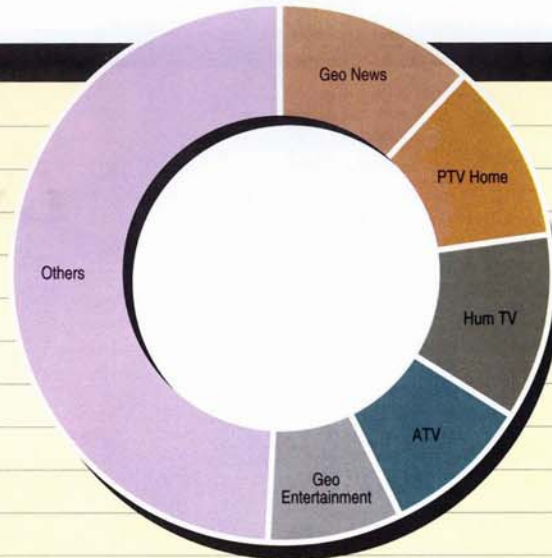
- TV ad spend (revenue) has increased by 13% (from Rs 17.29 billion to Rs 19.62 billion). In terms of overall share of spend, TV has increased by 4% (from 57% to 61%).
- Print ad spend (revenue) has decreased by 0.14% (from Rs 7.31 billion to Rs 7.30 billion). In terms of overall share of spend, print has decreased by 1% (from 24% to 23%).
- Outdoor ad spend (revenue) has decreased rather sharply by 12% (from Rs 2.60 billion to Rs 2.30 billion). In terms of overall share of spend, outdoor has decreased by 2% (from 9% to 7%).
- Direct marketing ad spend (revenue) has decreased by 6% (from Rs 1.70 billion to Rs 1.60 billion). In terms of overall share of spend, direct marketing has decreased by 1% (from 6% to 5%).
- Radio ad spend (revenue) has increased by 5% (from Rs 1.18 billion to Rs 1.24 billion). In terms of overall share of spend, radio has retained its position at 4%.

## TV SPEND BREAKUP

FY 2010-11

Data provided by Gallup Pakistan

TV Channel	Rs (bn)	% share
▶ Geo News	2.361	12
▶ PTV Home	2.223	11
▶ Hum TV	2.060	11
▶ ATV	1.776	9
▶ Geo Entertainment	1.663	8
▶ Aaj News	0.831	4
▶ Samaa	0.784	4
▶ TVOne	0.735	4
▶ ARY Digital	0.657	3
▶ Dunya News	0.526	3
▶ DawnNews	0.460	2
▶ Cartoon Network	0.445	2
▶ KTN	0.439	2
▶ Express News	0.387	2
▶ ARY News	0.338	2
▶ Apna	0.327	2
▶ Play	0.240	1
▶ Ten Sports	0.209	1
▶ CNBC Pakistan	0.201	1
▶ Indus Vision	0.200	1
▶ ARY Zauq	0.175	1
▶ Filmazia	0.166	1
▶ ARY QTV	0.164	1
▶ Geo Super	0.162	1
▶ Masala	0.139	1
▶ PTV News	0.133	1
▶ HBO	0.129	1
▶ A Plus	0.109	1
▶ AVT Khyber	0.102	1
▶ ARY Musik	0.086	1
▶ MTV Pakistan	0.084	0
▶ Rohi	0.076	0
▶ Sindh TV	0.066	0
▶ Waqt	0.061	0
▶ Aag	0.061	0
▶ Business Plus	0.054	0
▶ AXN	0.036	0
▶ Indus News	0.001	0
▶ Other channels	0.950	5
<b>Total</b>	<b>19.620</b>	<b>100</b>



## OVERVIEW

1. TV ad spend (revenue) has increased by 13% (from Rs 17.290 billion to Rs 19.620 billion). In terms of overall share of spend, TV has increased by 4% (from 57% to 61%).
2. Satellite channels account for 79% (Rs 15.488 billion) of spend, whereas terrestrial channels account for 21% (Rs 4.132 billion) of spend. Last year, satellite channels accounted for 76% of total TV spend whereas terrestrial channels accounted for 24%.
3. Satellite channels' ad spend has increased by 18% (from Rs 13.173 billion to Rs 15.488 billion). In terms of overall share of spend for TV, satellite channels have increased from 76% to 79%.
4. Terrestrial channels' ad spend has increased by a miniscule 0.33% (from Rs 4.118 billion to Rs 4.132 billion). In terms of overall share of spend for TV, terrestrial channels have decreased from 24% to 21%.
5. Geo News remains in the top spot but its share of spend has decreased from 14% to 12% and its revenue has decreased from Rs 2.405 billion to Rs 2.361 billion. PTV Home, which slid down to fourth place last year, is now in second place with revenue increasing from Rs 1.654 billion to Rs 2.223 billion.
6. The top five TV channels account for 51% 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

FY 2010-11

Data provided by **Gallup Pakistan**

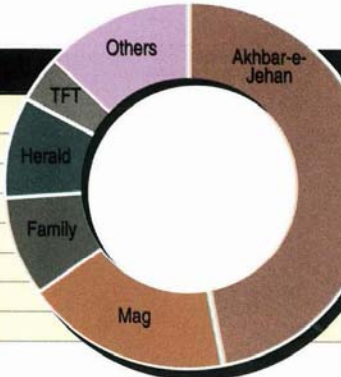
## Newspapers

Newspaper	Rs (bn)	% share
▶ Jang	2.432	34
▶ DAWN	1.554	22
▶ Express	0.783	11
▶ The News	0.695	10
▶ Nawa-i-Waqt	0.654	10
▶ Khabrain	0.300	4
▶ Business Recorder	0.224	3
▶ The Nation	0.138	2
▶ Daily Times	0.096	1
▶ Pakistan	0.052	1
▶ Asas	0.056	1
▶ Din	0.037	0
▶ Other newspapers	0.106	1
<b>Total</b>	<b>7.127</b>	<b>100</b>



## Magazines

Magazine	Rs (bn)	% share
▶ Akhbar-e-Jehan	0.080	47
▶ Mag	0.030	18
▶ Family	0.017	9
▶ Herald	0.015	9
▶ The Friday Times	0.007	4
▶ Newslite	0.006	4
▶ Other magazines	0.015	9
<b>Total</b>	<b>0.170</b>	<b>100</b>



## OVERVIEW

1. Print ad spend (revenue) has decreased by 0.14% (from Rs 7.310 billion to Rs 7.300 billion). In terms of overall share of spend, print has decreased by 1% (from 24% to 23%).
2. Newspapers account for 98% (Rs 7.127 billion) of total print spend, while magazines account for 2% (Rs 0.170 billion). This bifurcation remains unchanged from last year.
3. Newspapers' ad spend (revenue) has decreased by 0.2% (from Rs 7.148 billion to Rs 7.127 billion). In terms of overall share of spend, newspapers have retained their position at 98%.
4. Magazines' ad spend (revenue) has increased by 5% (from Rs 0.162 billion to Rs 0.170 billion). In terms of overall share of spend, magazines have retained their position at 2%.
5. *Jang* and *Akbar-e-Jehan* have retained the top spots in newspapers and magazines respectively.

### NB:

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2. Gallup ad spend estimates are exclusive of taxes but include agency commission.
3. Scrolls, animation, 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.