

Thursday, February 21, 2008

Latest Newsletter from AdEx India, a division of TAM Media Research

Subject: Snapshot on Airline sector advertising in Print during 2007

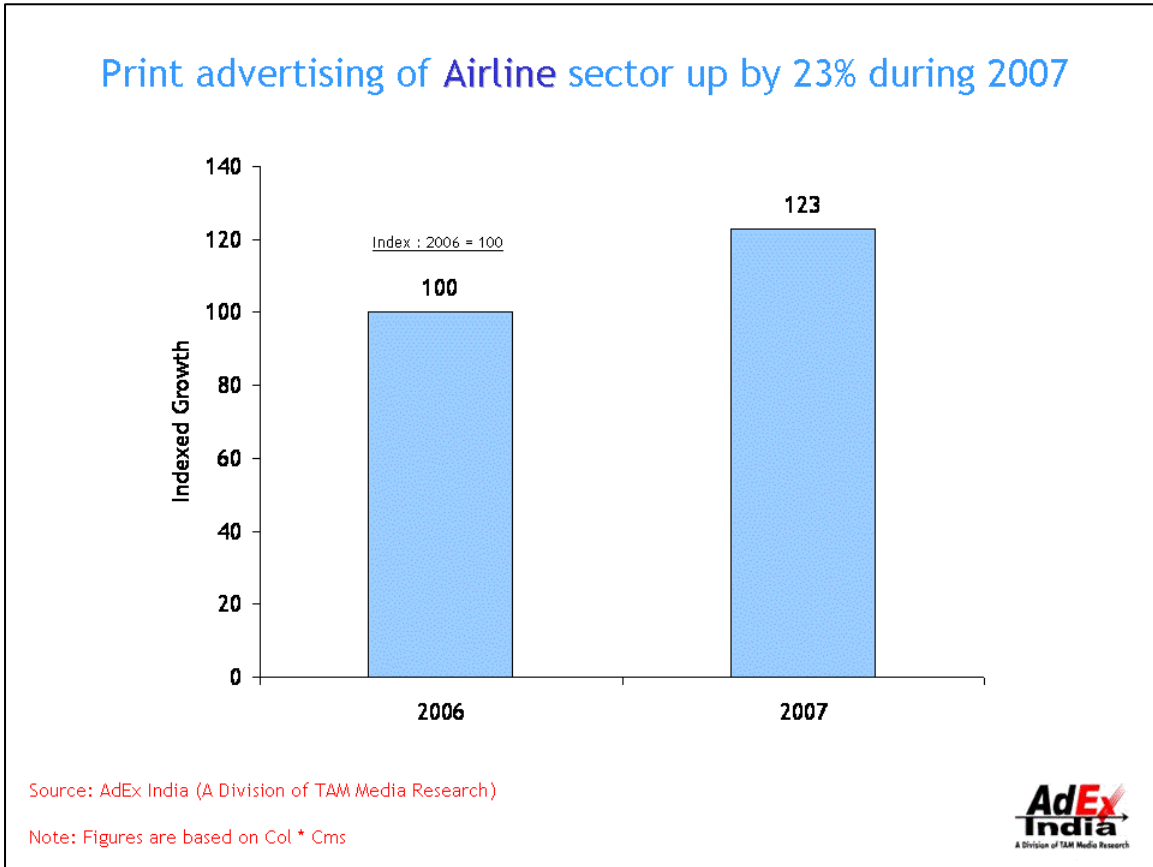
(Note: The entire analysis is based on Col*Cms)

Highlights:

- 23% growth in Print advertising of the Airline sector during 2007 compared to 2006.
- Airline sector advertising at its peak during the 3rd quarter of 2007.
- 'General Interest' Newspapers and 'News/Current Affairs' Magazines had maximum share of Airline sector advertising during 2007.
- Domestic Airlines garnered 69% share of Airline sector advertising in Print during 2007.
- 'Air India' and 'Deccan Aviation Pvt Ltd' had close competition for the 1st position in the Domestic Airlines advertisers list.
- 'Emirates Airlines' was the top advertiser among the International Airlines in Print during 2007.

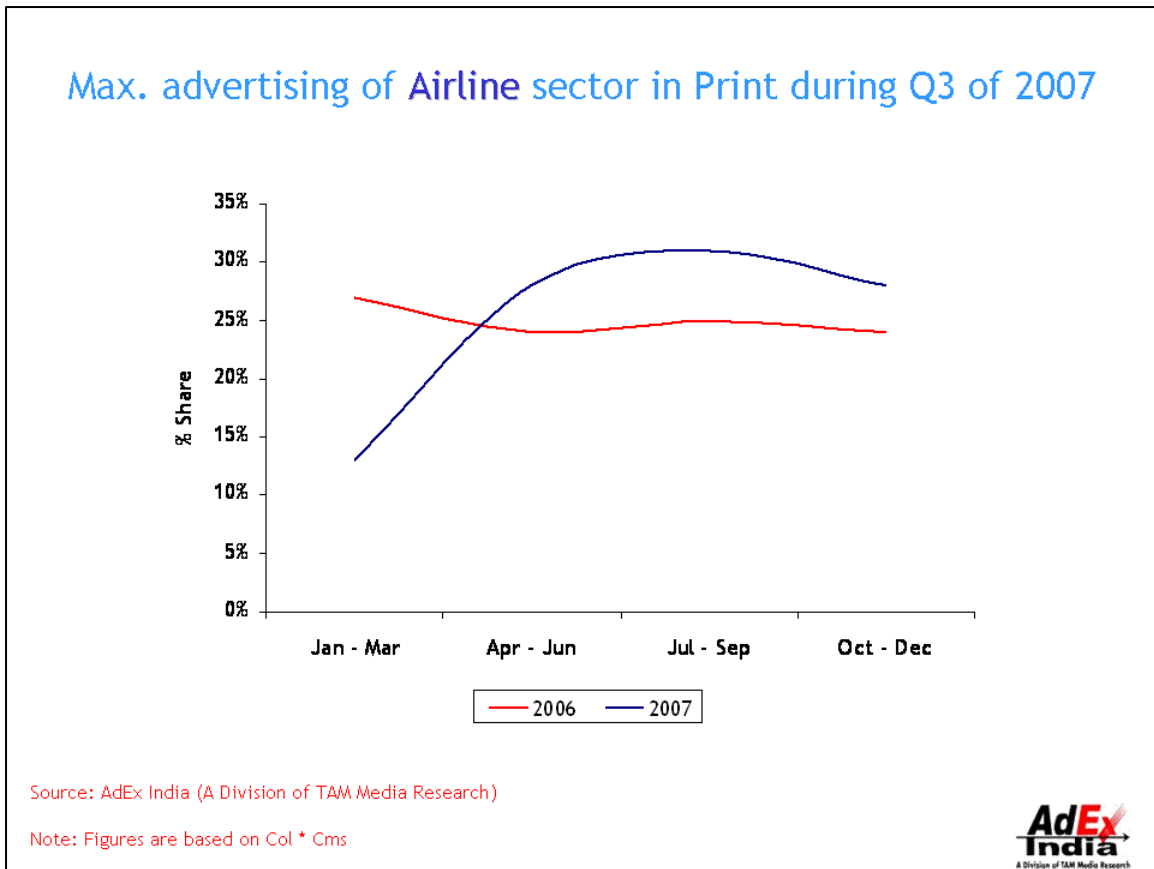


Growth in Ad Volumes of Airline sector



- Compared to 2006 Airline sector advertising in Print grew by 23% during 2007.

Quarterly advertising share of Airline sector



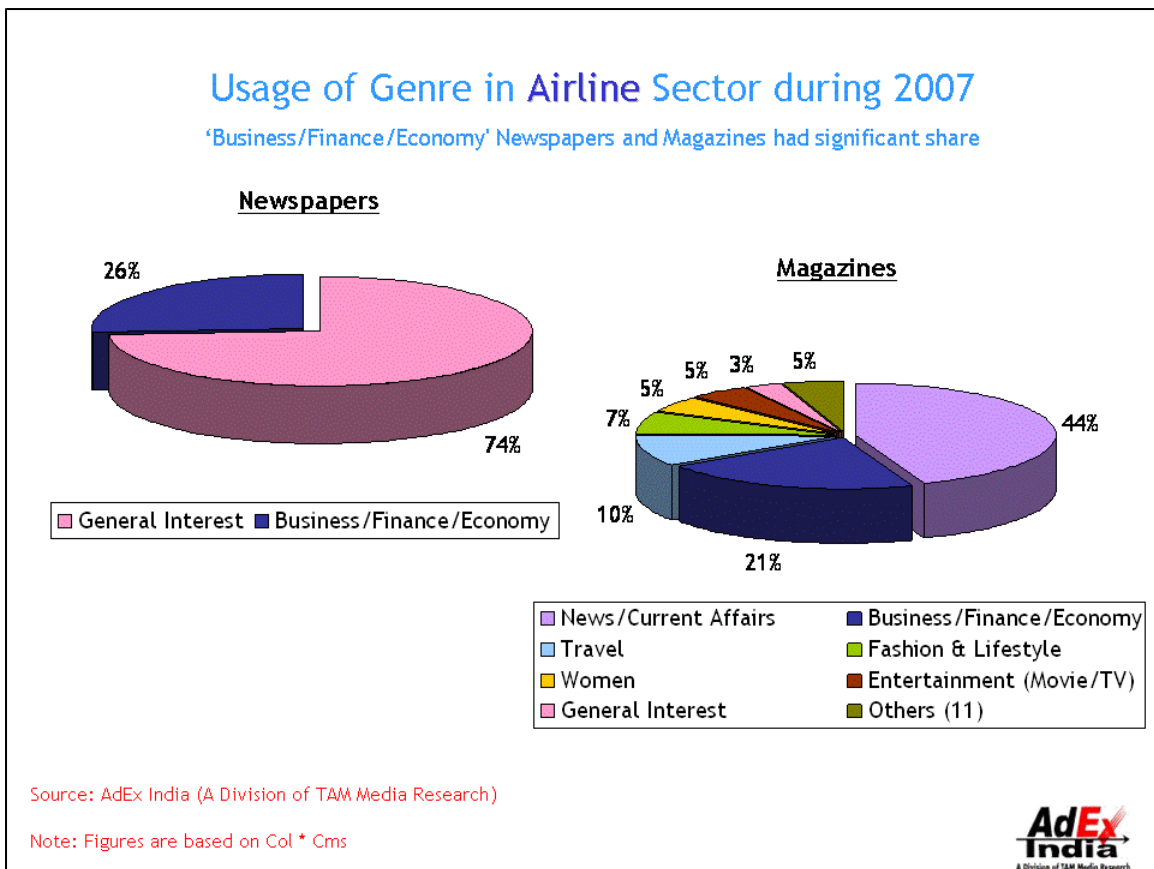
- Equal advertising share of Airline sector during the 2nd and 4th quarter across 2006 and 2007.
- 'Air India' accounted for more than half of Airline sector advertising during the 3rd quarter of 2007.

Newspapers and Magazines were used in the advertising ratio of 93:7.

Genre preference in Airline sector

Usage of Genre in Airline Sector during 2007

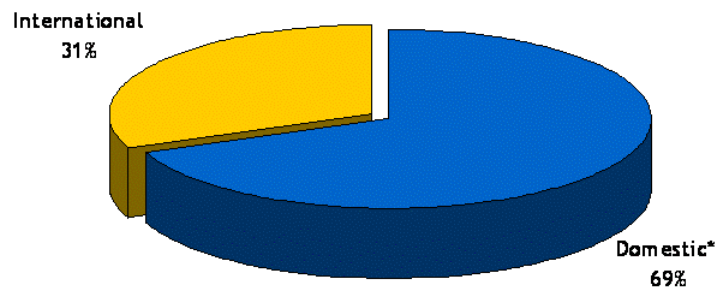
'Business/Finance/Economy' Newspapers and Magazines had significant share



- 'General Interest' and 'Business/Finance/Economy' Newspaper were used in the ratio of 74:26 for the Airline sector advertising during 2007.
- The Top 3 Magazines Genres i.e. 'News/Current Affairs', 'Business/Finance/Economy' and 'Travel' accounted for 75% share of total Airline sector advertising on Magazines.

Share of segments of Airline sector

Nearly 70% share of Airline sector ad volumes contributed by Domestic Airlines



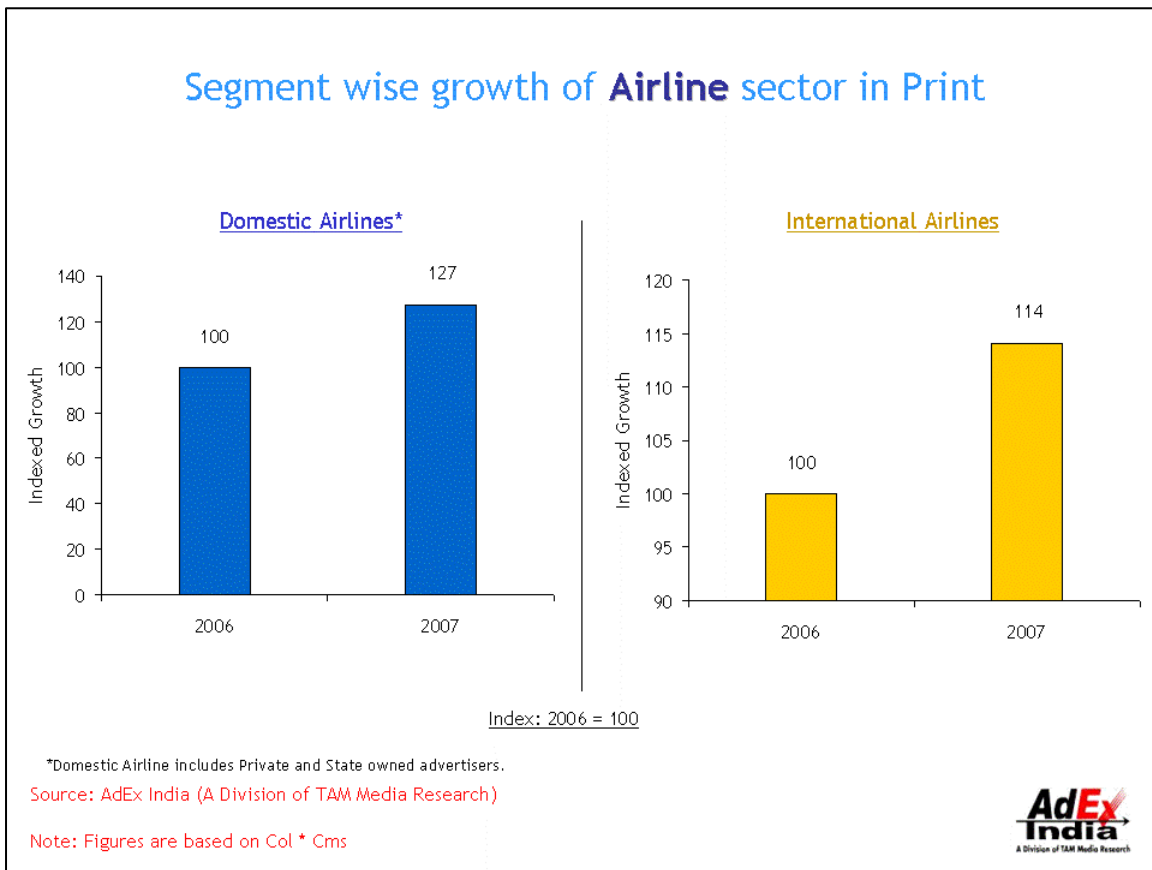
*Domestic Airline includes Private and State owned advertisers.

Source: AdEx India (A Division of TAM Media Research)

Note: Figures are based on Col * Cms

- Domestic Airlines and International Airlines did print advertising in the ratio of 69:31 during 2007.

Growth in Ad Volumes of Airline segments



- 27% rise in ad volumes of Domestic Airlines whereas International Airlines ad volumes grew by 14% in Print during 2007 over 2006.

Top Advertisers of Airline segments

Top 5 Advertisers of **Airline** sector in 2007

Domestic Airlines*

Top Advertiser	% Share
Air India	27%
Deccan Aviation Pvt Ltd	26%
Jet Airways (I) Pvt Ltd	20%
Kingfisher Airlines Ltd	8%
Indian Airlines Ltd	4%

International Airlines

Top Advertiser	% Share
Emirates Airlines	15%
Lufthansa	11%
Finnair	8%
Air France	8%
British Airways	8%

*Domestic Airline includes Private and State owned advertisers.

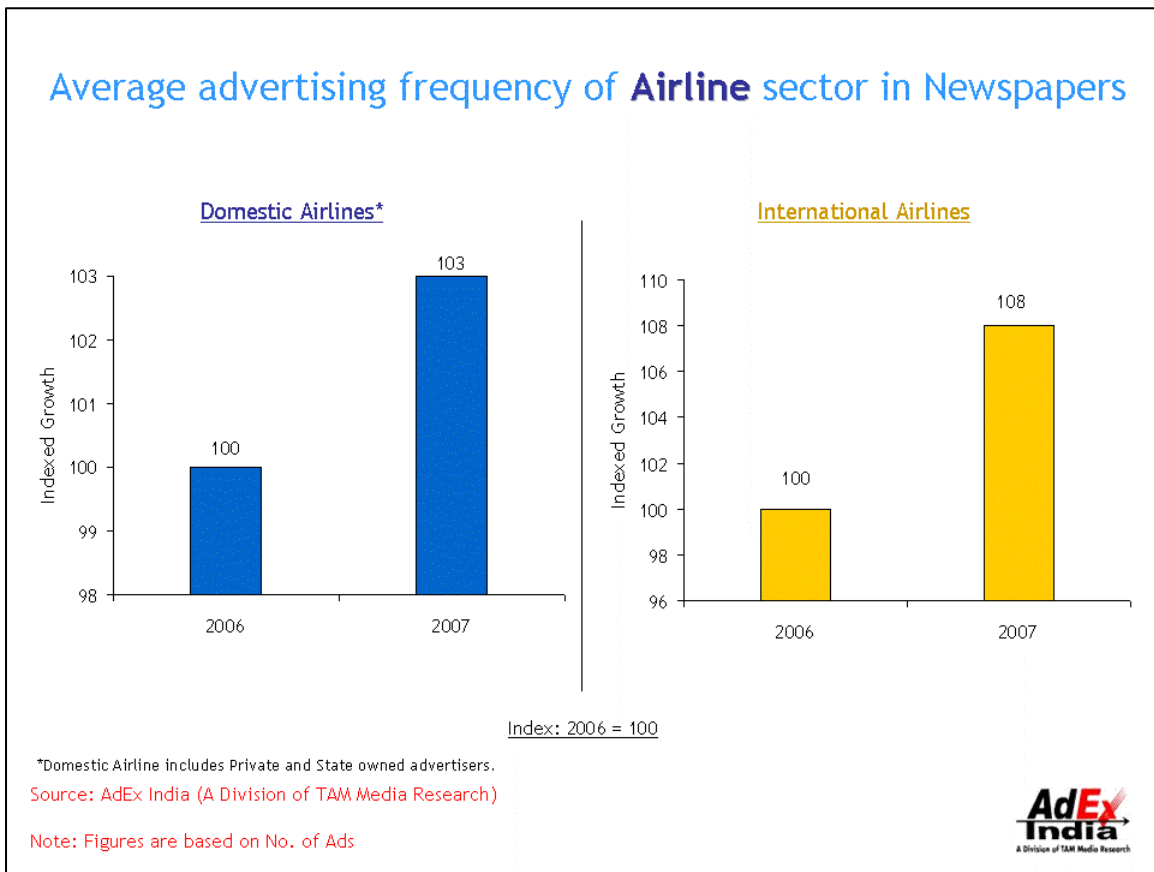
Source: AdEx India (A Division of TAM Media Research)

Note: Figures are based on Col * Cms

- Top 5 advertisers accounted for 86% share of Domestic Airlines advertising in Print during 2007.
- Whereas the top 5 International Airline advertisers contributed 54% share of total ad volumes of International Airlines in Print.
- 'Air India' and 'Emirates Airlines' stood at number one position in the top advertisers list of Domestic Airlines and International Airlines respectively during 2007.

Note: The merger of Deccan Aviation Pvt Ltd and Kingfisher Airlines Ltd took place around mid of Dec '07 and so the two entities are kept as separate advertisers in the study.

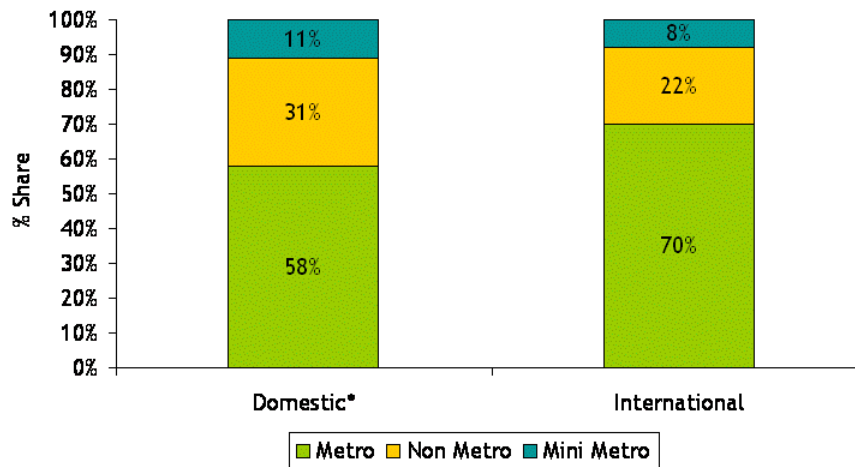
Advertising frequency of Airline sector in Print



- During 2007, 3% rise in Average number of ads of Domestic Airlines advertised per day in Newspapers whereas that of International Airlines it saw an 8% rise.

Advertising share (Metro, Non Metro and Mini Metro) Newspapers

High advertising of Airline sector in Metro Newspapers



*Domestic Airline includes Private and State owned advertisers.

Source: AdEx India (A Division of TAM Media Research)

Note: Figures are based Col * cms

- International Airlines advertised more in Metro Cities compared to Domestic Airline during 2007.
- Whereas Domestic Airlines had more share in Non Metro and Mini Metro cities in comparison of International Airlines.

Watch out for forthcoming interesting analyses in future.
(Analysis from AdEx India-A Division of TAM Media Research)

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