

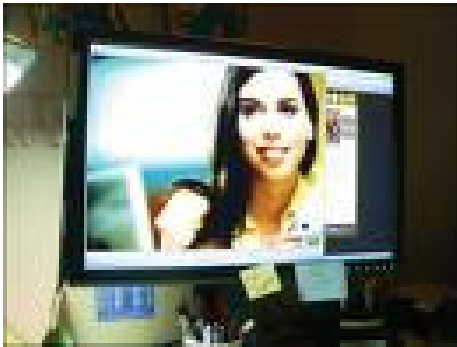
Tuesday, 29 January, 2008

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

Subject: Snapshot on TV Advertising in 2007 – Part 1

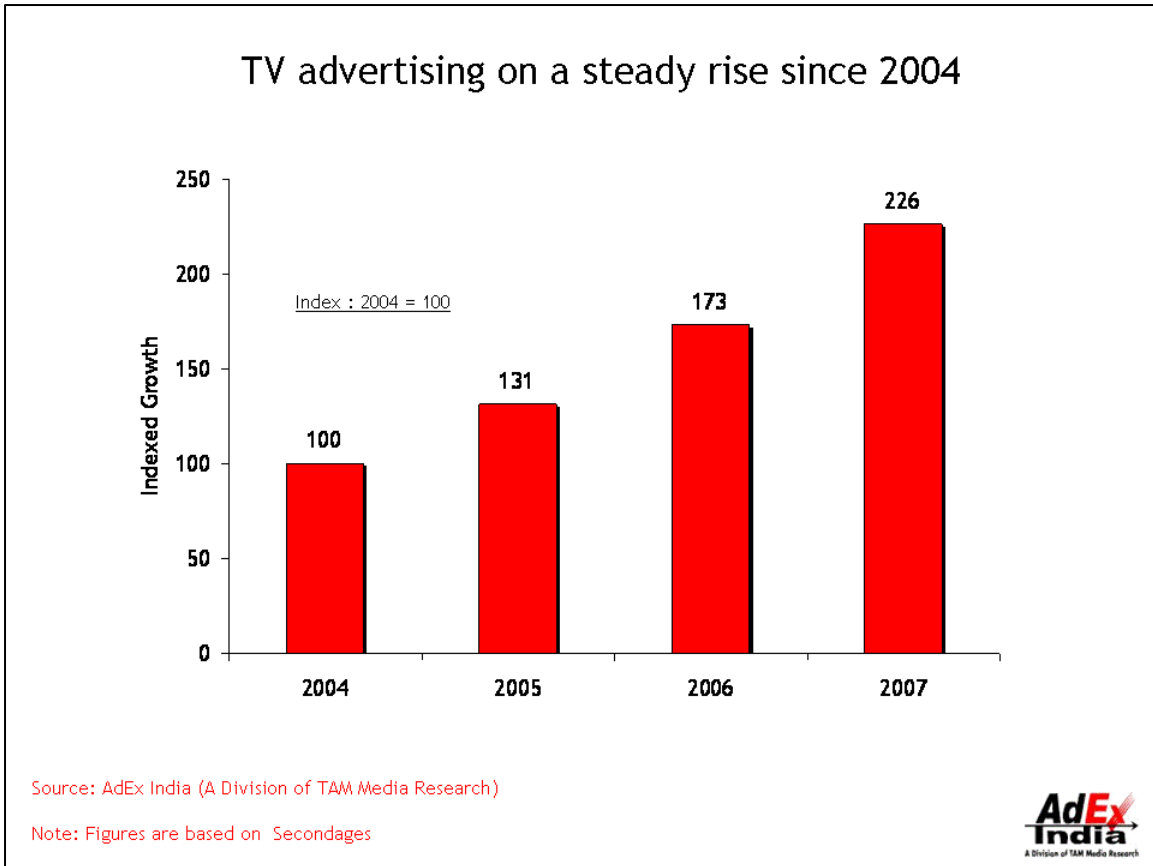
(Note: The entire analysis is based on Secondages)

Highlights:



- **31% growth in TV ad volumes during 2007 compared to 2006.**
- **'Food & Beverages' sector leads in TV advertising during 2007.**
- **'HUL' maintained its 1st rank in the top 10 advertisers list on TV across both the years 2006 and 2007.**
- **TV advertising at its peak during the last quarter of 2006 and 2007.**

Volumes Growth in TV advertising



- TV ad volumes saw a tremendous growth of 126% during 2007 compared to 2004.

Share of Sectors in TV advertising

TV advertising driven by 'Food & Beverages' sector

| Top Sectors | % Share |
|------------------------------------|---------|
| Food & Beverages | 14% |
| Personal Care/Personal Hygiene | 9% |
| Services | 6% |
| Hair Care | 5% |
| Banking/Finance/Investment | 5% |
| Automobiles | 4% |
| Personal Accessories | 4% |
| Telecom/Internet Service Providers | 4% |
| Durables | 3% |
| Personal Healthcare | 3% |

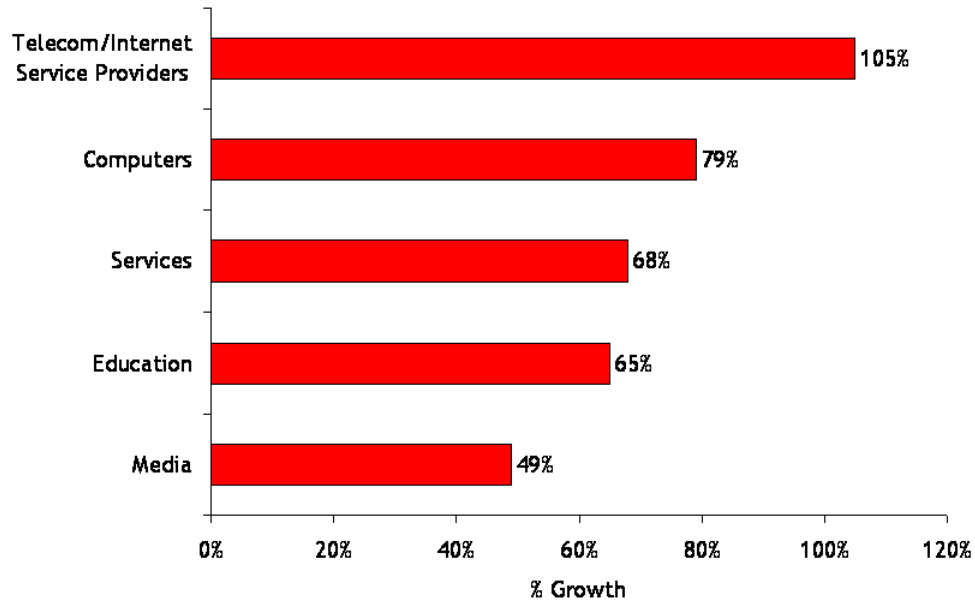
Source: AdEx India (A Division of TAM Media Research)

Note: Figures are based on Secondages

- Top 10 sectors constituted 58% share of TV advertising during 2007.
- With 14% share 'F&B' had the largest share of TV advertising, followed by 'Personal Care/Personal Hygiene' and 'Services' with 9% and 6% share respectively.

Sectors having maximum advertising growth on TV

Fastest growing sector on TV during 2007 over 2006



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

Note: Figures are based on Secondages

- Among all the sectors 'Telecom/Internet Service Providers' has seen maximum advertising growth of 105% on TV, followed 'Computers' and 'Services' sector with 79% and 68% growth during 2007 over 2006.

Positioning of Top 10 Categories on TV

Category Movers on TV in 2007

‘Internet/SMS Service’ leaped max. places

| Top 10 Categories | Rank in 2007 | Rank in 2006 |
|------------------------|--------------|--------------|
| Cellular Phone Service | 1 | 5 |
| Social Advertisements | 2 | 1 |
| Toilet Soaps | 3 | 2 |
| Corporate/Brand Image | 4 | 6 |
| Internet/SMS Service | 5 | 15 |
| Cellular Phones | 6 | 3 |
| Shampoos | 7 | 4 |
| Aerated Soft Drink | 8 | 9 |
| Tooth Pastes | 9 | 8 |
| Two Wheelers | 10 | 10 |

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

Note: Rank are based on Secondages

- Only 'Two Wheelers' category maintained its rank in 2006 and 2007.

Top Players on TV in 2007

Top 10 advertisers accounted for 18% share of TV advertising in 2007

| Top 10 Advertisers | % Share |
|-------------------------------|---------|
| Hindustan Unilever Ltd | 5% |
| Reckitt Benckiser (India) Ltd | 2% |
| Paras Pharmaceuticals Ltd | 1% |
| Coca Cola India Ltd | 1% |
| Pepsi Co | 1% |
| Bharti Airtel Ltd | 1% |
| Colgate Palmolive India Ltd | 1% |
| Procter & Gamble | 1% |
| L' Oreal India Pvt Ltd | 1% |
| Smithkline Beecham | 1% |

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

Note: Figures are based on Secondages

- 'Bharti Airtel Ltd' under 'Telecom/Internet Service Provider' and 'Coca Cola India Ltd', 'Pepsi Co' and 'Smithkline Beecham' under 'Food & Beverages' sector made it to the top 10 list of advertisers on TV during 2007.
- 'HUL', 'Reckitt Beckiser (India) Ltd' and 'Paras Pharmaceuticals Ltd' were the top 3 advertisers on TV during 2007.

Rank Shift in Top Advertisers in 2007 during 2006

Positioning of Top 10 Advertisers

‘HUL maintained its 1st rank across both the years 2006 and 2007

| Top 10 Advertisers | Rank in 2007 | Rank in 2006 |
|-------------------------------|--------------|--------------|
| Hindustan Unilever Ltd | 1 | 1 |
| Reckitt Benckiser (India) Ltd | 2 | 3 |
| Paras Pharmaceuticals Ltd | 3 | 2 |
| Coca Cola India Ltd | 4 | 6 |
| Pepsi Co | 5 | 10 |
| Bharti Airtel Ltd | 6 | 22 |
| Colgate Palmolive India Ltd | 7 | 5 |
| Procter & Gamble | 8 | 7 |
| L' Oreal India Pvt Ltd | 9 | 4 |
| Smithkline Beecham | 10 | 13 |

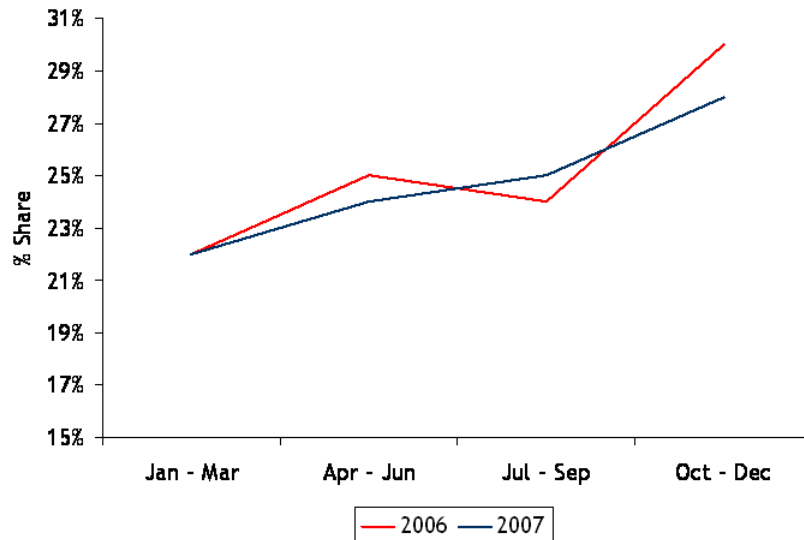
Source: AdEx India (A Division of TAM Media Research)

Note: Rank are based on Secondages

- 6 out of the top 10 advertisers of 2007 have seen a positive shift in their ranking compared to 2006.
- 'Bharti Airtel Ltd' and 'Pepsi Co' jumped maximum places to be in the top 10 list of advertisers on TV in 2007.

Quarterly TV advertising

High advertising during the 4th quarter



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

Note: Figures are based on secondages

- 15% more advertising during the 2nd half of the year compared to the 1st half in 2007.

Watch out for the sequel of the Newsletter which will show an in-depth analysis of advertising on TV. , Which will include **Share of Channel Genres, Print and Radio Promotion on TV, Top 10 Exclusive Advertisers on TV, Top New Brands advertised on TV ...**
Happy Reading

(Analysis from AdEx India-A Division of TAM Media Research)

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