

Tuesday, February 12, 2008

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

**Subject: Advertising by Telecom Industry on TV in 2007**

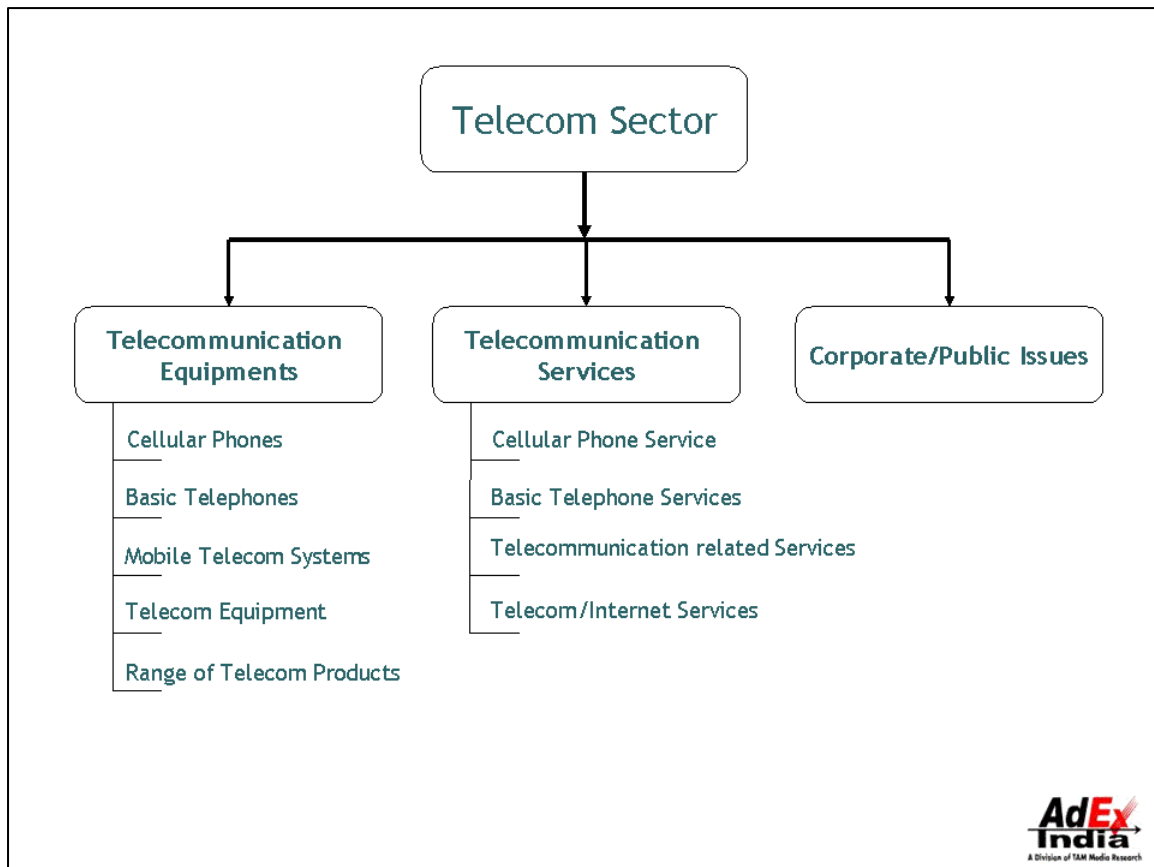
(Note: The entire analysis is based on Secondages)



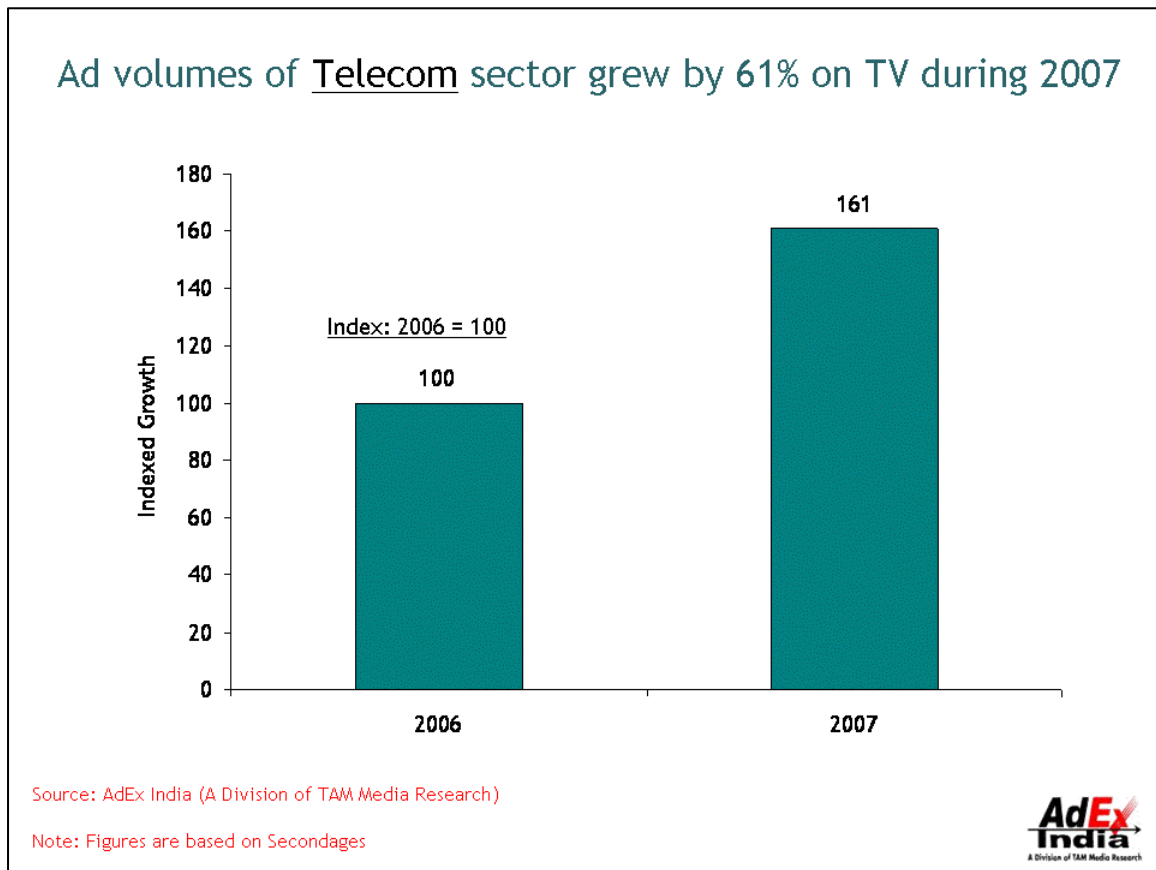
Highlights:

- **Telecom sector advertising on TV grew by 61% during 2007 compared to 2006.**
- **'Telecommunication Services' segment had more than 60% share of overall Telecom sector advertising on TV.**
- **'Telecommunication Services' has seen a rise of 108% in TV advertising, whereas 'Telecommunication Equipments' saw a rise of 17% during 2007 over 2006.**
- **'Bharti Airtel Ltd' was the number one advertiser under 'Telecommunication Services' and 'Nokia Corporation' led 'Telecommunication Equipments' advertising on TV during 2007.**

**The segregation of the Telecom Sector:**



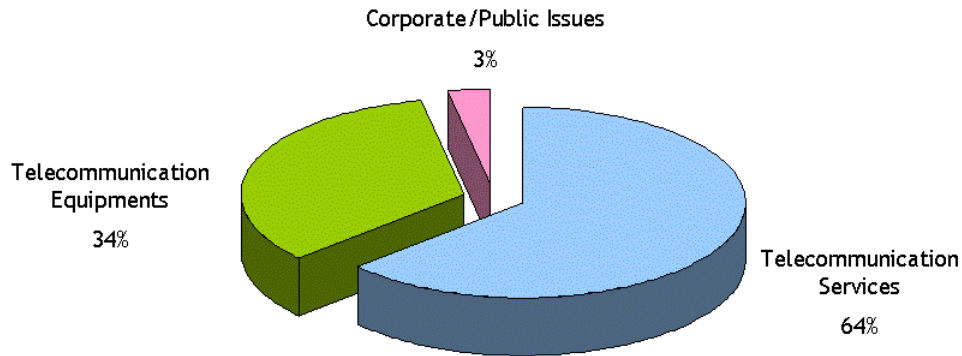
**Growth in ad volumes of Telecom sector**



- Telecom sector has seen a rise of 61% in TV advertising during 2007 over 2006.

**Share of segments of Telecom sector**

2/3 rd share of Telecom sector advertising under  
Telecommunication Services

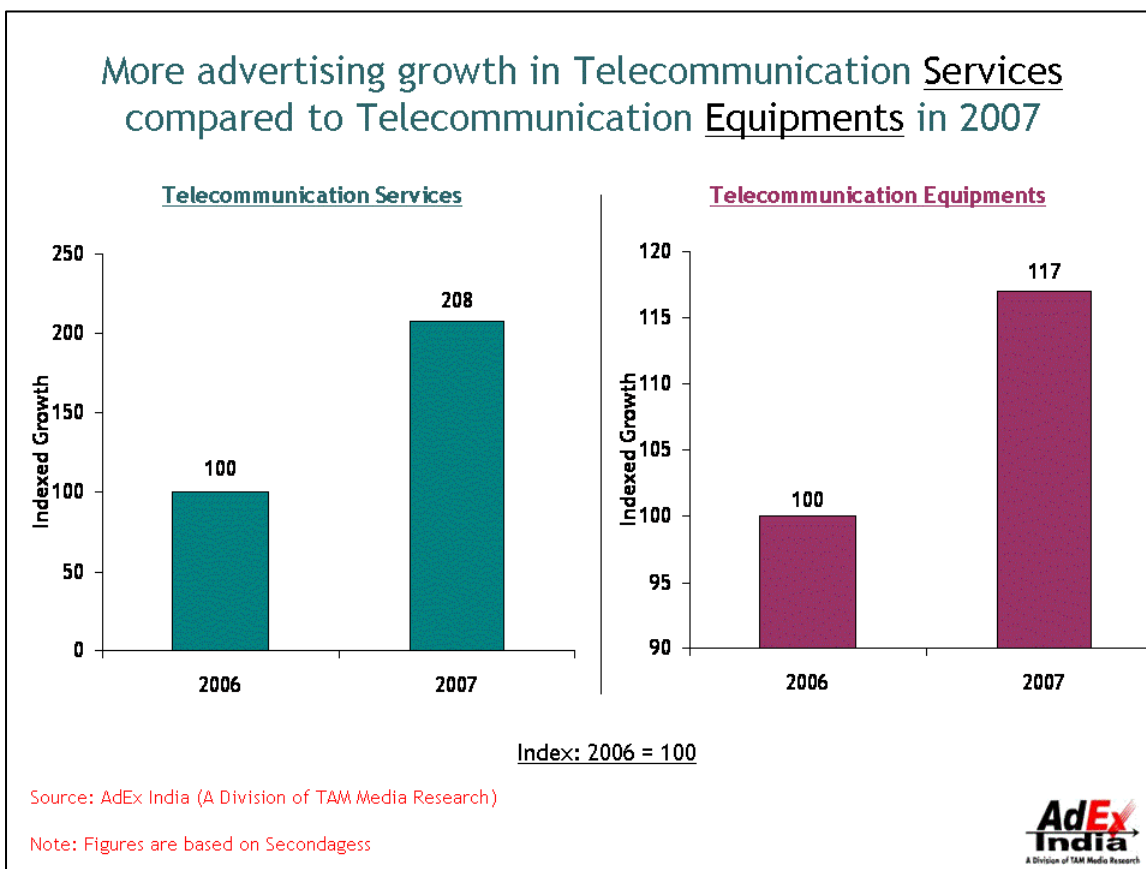


Source: AdEx India (A Division of TAM Media Research)

Note: Figures are based on Secondages

- 'Telecommunication **Services**' had the largest share of **64%** followed by 'Telecommunication **Equipments**' and '**Corporate Brand Image/Public Issue**' with **34%** and **3%** respectively in 2007.
- In Telecom sector **MTNL** leads for 'Corporate' advertising and **Idea Cellular Ltd** tops in 'Public Issue' advertising on TV during 2007.

**Growth in ad volumes of segments of Telecom sector**



- 'Telecommunication **Services**' has recorded a growth of **108%** in TV advertising during 2007 over 2006.
- Compared to 2006 'Telecommunication **Equipments**' saw a growth of **17%** on TV during 2007.

**Top 5 advertisers under the Telecom Segments**

Top 5 advertisers in Telecom sector on TV during 2007

Telecommunication Services

| Advertiser                  | % Share |
|-----------------------------|---------|
| Bharti Airtel Ltd           | 32%     |
| Reliance Communications Ltd | 15%     |
| Hutchison Essar Telecom Ltd | 11%     |
| Tata Teleservices           | 11%     |
| Idea Cellular Ltd           | 9%      |

Telecommunication Equipments

| Advertiser                    | % Share |
|-------------------------------|---------|
| Nokia Corporation             | 43%     |
| Sony Ericsson (India)         | 16%     |
| Motorola                      | 16%     |
| Samsung India Electronics Ltd | 9%      |
| LG Electronics India Ltd      | 7%      |

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

Note: Figures are based on Secondages

- Top 3 advertisers under the 'Telecommunication **Services**' are 'Bharti Airtel', 'Reliance Communication Ltd' and 'Hutchison Essar Telecom Ltd' on TV in 2007.
- Top 5 advertisers of 'Telecommunication **Equipments**' contributed 95% share of segment advertising during 2007.
- 'Nokia Corporation' topped the chart of top advertisers under 'Telecommunication **Equipments**' with 43% share followed 'Sony Ericsson (India)' and 'Motorola' each with 16% share in TV advertising during 2007.

**New Brands advertised in Telecom Equipments & Services**

New launches on TV in 2007

Telecommunication Services

| Rank | Top New Brands                  |
|------|---------------------------------|
| 1    | Airtel New Lifetime Prepaid     |
| 2    | Airtel Super Lifetime           |
| 3    | Airtel Music                    |
| 4    | Airtel Happy Recharge           |
| 5    | Airtel Blackberry Pearl         |
| 6    | Reliance Cricket Dhanadhan Pack |
| 7    | Idea My Gang                    |
| 8    | Hutch Live Search               |
| 9    | Hutch Blackberry                |
| 10   | Airtel Hello Tunes              |

Telecommunication Equipments

| Rank | Top New Brands      |
|------|---------------------|
| 1    | Sony Ericsson W200i |
| 2    | LG Shine            |
| 3    | Nokia 6300          |
| 4    | Motorola RAZR 2     |
| 5    | Samsung E250        |
| 6    | Nokia N95           |
| 7    | Sony Ericsson K810i |
| 8    | Motorola MOTO ROKR  |
| 9    | Sony Ericsson W880i |
| 10   | Nokia 3110          |

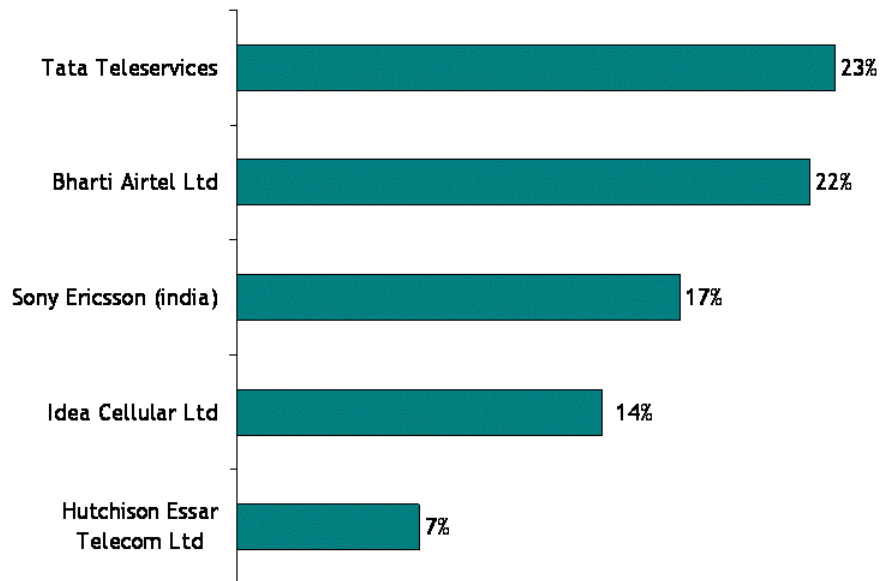
Source: AdEx India (A Division of TAM Media Research)

Note: Rank are based on Secondages

- Top 10 New brands list of 'Telecommunication **Services**' comprised of maximum of 6 brands of 'Airtel' and 2 from 'Hutchison Essar Ltd'.
- During 2007 the top 10 list of new 'Telecom **Equipments**' launched on TV was a mix of 3 brands each of 'Sony Ericsson' and 'Nokia'.

**Top advertisers with Celebrity endorsement ad volumes**

Tata Teleservices had the maximum share of celebrity endorsement on TV



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

Note: Figures are based on Secondages

- During 2007, 'Tata Teleservices' had the largest share of 23% of the celebrity endorsement on TV followed by 'Bharti Airtel Ltd' and 'Sony Ericsson (India)' with 22% and 17% respectively during 2007.

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

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