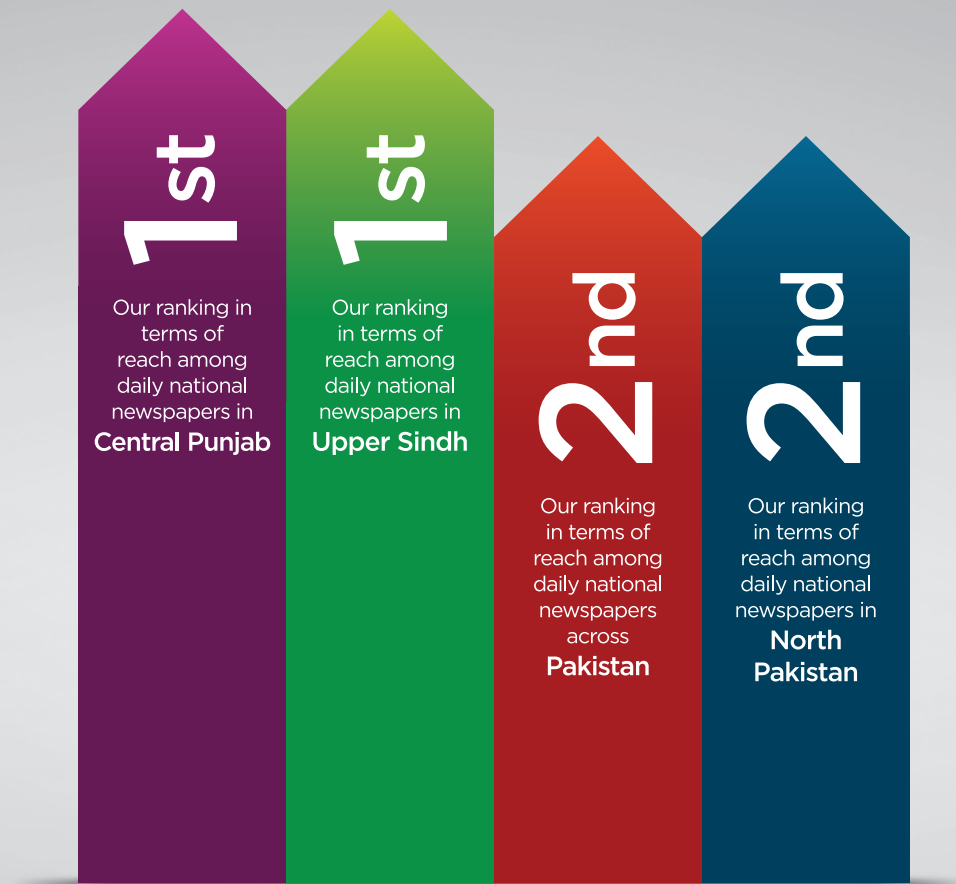


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Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of € 1.712,4 million (2.274 M\$) in 2013.

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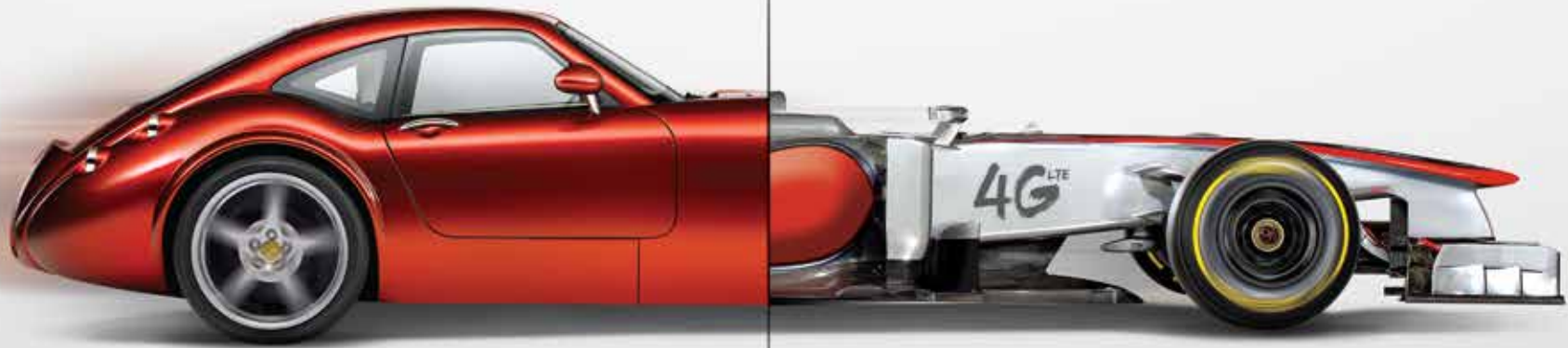
Cover Design

There are many routes to understanding consumer insights, the key is finding the right one. This book acts as a map to understanding how the consumer thinks. The visual shows routes with all the touch points of reaching the consumer. **Courtesy:** Red Communication Arts

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Foreword



In its brief journey since inception, Ipsos Pakistan has progressed remarkably while achieving many milestones. Success of our last publication Media Book of Pakistan encouraged us going an extra mile and broaden information horizons for the current publication which is in your hands. Pakistan is one of the least documented economies of the world. Realizing the need of authentic data about such a big consumer market in the world, I found it my professional obligation to bridge the gap to the extent possible. I believe that a more confident viewpoint about this resilient economy on the part of investors and business conglomerates will enable them to see beyond the smoke screen. The existing and upcoming players in diverse categories of products and services wish to have a high resolution scanning of this highly fragmented society to make bold marketing decisions. I am sure they will utilize the consolidated data of this book to have a broader perspective towards their target audiences and vivid understanding of our market dynamics. A snapshot of evolving multimedia landscape will also be a matter of great interest for the readers.

During my lectures at various leading business schools of Pakistan, I realized that many students are caught by blind spots about their own country. Theoretical knowledge and academic research do not seem to equip them with a vision which is imperative to serve and lead businesses in Pakistan. Hence again, I believe these few pages will reveal quite a few new paradigms of consumer behavior to them.

Based on the same data, a very intriguing presentation titled as "How urbanized RURAL Pakistan is?" was delivered in MARCON lately. The feedback and especially the inquisitiveness followed by that presentation triggered my interest to apprise the audience more about this untapped goldmine. A dedicated section about Rural Pakistan is an effort in the same connection.

At the end, I would like to highlight that the affluent Pakistanis comprised of SEC A&B in Urban and SEC A in Rural, add up to 20 million approximately. This pocket of population alone is bigger than more than 53 developed countries of the world. This is what we rightly claim huge demographic dividends which this country offers to local or global investors, brand owners and entrepreneurs. And this book affirms this promise with authentic facts and figures.

Abdul Sattar Babar

Managing Director
Ipsos Pakistan



From the Desk of Chief Editor



Actions speak louder than words but only those which are backed by insights and are transformational by nature. This is the premises where researchers dwell into. In the realm of consumers' research, we take pride in producing and disseminating actionable insights while contributing to the knowledge economy. The daunting challenge for a researcher turned editor is to convert data into an expression; self-consultative and reasonable. An expression which, at the same time, should adhere to the dialect of a story and multiplicity of an abstraction.

To me, nothing is more dramatic and intriguing than the bar & pie charts, percentages and indices; provided they stimulate logic & intuition simultaneously. This fascination drove the selection and expression of content in this Consumers' Book of Pakistan. The most difficult part was not what to include but what not to include. Searching the gist from the piles of data was like finding needle in the haystack. We did it to embrace yet another challenge of making these data bites aesthetically appealing. Editing this book gave me the blended pleasure of being a researcher, story teller, copy writer, creative artist and a marketer.

Wish you a happy reading!

Yasir Masood Afaq

Chief Editor
Consumers Book of Pakistan 2014-15



NURTURING
AMAZING
TRUSTING
UNDERSTANDING
REAL
AUTHENTIC
LOVE



From the Desk of MediaCT Head



Recent market research industry has revived in many aspects; but still not enough to resolve the most common question that is raised in people's mind, "WHY do we need to EXPLORE when the FACTS are around us"? In resolving this question you have to ponder on the fact that Walkman weren't invented by exploring turntables - Cellphones weren't designed by exploring landlines - Bulbs weren't invented by exploring candles. No doubt, there is no harm with backbone old data, raw statistics, old publications, Guru's experience and Gut feel - they do well and are all fine as far as they GO, but problem is they don't go far enough to be insightful. Hence, it is vital to "GO BEYOND OBVIOUS" and to "GO BEYOND TRADITIONAL" and create novel, innovative IDEAs - these ideas begin - by EXPLORING with an open mind.

Once, one is satisfied with his learning, the learning comes to an end. So the KEY in research world, "THE MORE YOU LOOK THE MORE YOU FIND". So, Consumers' Book of Pakistan 2014-15 is the latest depiction of our yearning to learn more and more about Pakistani consumers, this is an attempt to collaborate with consumers to discern their media habits, category consumption pattern and their psychographic context besides number of variables.

At MediaCT division our focus is to introduce most sort out media researches within Pakistani market. All of our upcoming research initiatives are driven by local principles - Uniqueness, Relevance and Affordability.

Hope readers will appreciate & acknowledge this CSR initiate of Ipsos Pakistan and render their feedback, queries, suggestions and comments with our editorial team whenever feel the need.

Enjoy the read!

Maimuna Shafaat

MediaCT Head
Ipsos Pakistan



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EASY TO POUR



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An all Encompassing Single Source Data

Consumers' Book of Pakistan 2014-15 is an extended form of our previous publication "The Media Book of Pakistan" (Powered by Consumer Multimedia Index - CMI commissioned by Pakistan Advertisers' Society-PAS in 2008). This handbook is an offshoot of BRANDpuls Pakistan (powered by Consumer Multimedia Index) which is a multi-object tracking & hierarchically organized single source data bank that entails a panoramic 360° media reach and frequency and selected category information across urban & rural Pakistan. Project field work was conducted during March-April 2014. BRANDpuls offers all-inclusive research data as one-stop solution inevitably required for marketing & media planning. Since its endorsement by Pakistan Advertisers Society (PAS) in 2009, this syndicated study is the most cited reference all over the country that captures information for 8 media vehicles such as multimedia penetration, channels/titles reach, frequency and recency of media usage, genre/section preferences, place and multimedia audience profiling. Over 50 product categories consumption data & Psychographics profiling of consumers are also included in the study.

10 key cities were purposefully covered as 'Self Representing Cities' keeping in view their concentrated commercial significance and trend setting civic lifestyle prevalence. Overall methodology deployed to recruit the respondents across Rest of urban (RoU) and rural vicinities was a mix of Multistage Stratified Disproportionate Systematic Random and Probability Proportionate to Size (PPS) sampling to select cities and villages as Primary Sampling Units (PSUs). For Secondary Sampling Units (SSUs) in the Key Cities, Charges/Circles were chosen through Systematic Random method while in other cities Quadrant Mapping was followed for the same process. Actual respondent amongst all potentially valid members of an elected Household, was selected through Kish Grid Method. In case of non-availability of target respondent at the time of 1st contact, minimum 2 re-contact attempts were made prior to interviewing any same-gender 'Substitute' respondent belonging to similar SEC and age, within same neighborhood.

The projected population of this BRANDpuls wave is 103 million that excludes populace belonging to SEC E2 (Urban) and kids below 12 years of age. The sample is weighed and projected according to estimated population of Pakistan in 2014 based on National Census of 1998.

Ahmer Siddiqui

Editor
Consumers Book of Pakistan 2014-15



BRANDpuls at a Glance

What?

A National Representative Study with country's most robust sample & coverage since 2009 (as a sequel of CMI) to yield unprecedented single source data about Pakistan Consumers.

How?

- Face to Face Interviews
- Pen & Paper Techniques
- Door to Door Methodology

Who?

- Equal Gender Split
- Aged 12 years and above
- SEC A to E1 (Urban)
- All SECs (Rural)

Where?

- National Coverage
- 15,000 Respondents
- 10 Key Cities (Individually Reported)
- 40 Cities' Panel as Rest of Urban
- 500 Villages



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Research – The Real Driving Force

The significance of research cannot be undermined in the world of brands. It has become extremely vital to base decisions on them and for successful implementation of ideas. It provides new solutions to tackle issues and offers in-depth analysis of a particular market situation that leads to manageable conclusions. Also, one of the most important is identifying opportunities that results in growth and expanding in new areas.

We, as marketers, depend greatly on quality and authentic research data to challenge ourselves in new ways. The presence of quality research studies is a real contribution to knowledge. It is highly encouraging to see a dedicated team of Ipsos conducting quality research in the given challenges. Also, making such an important study available for the benefit of all, is a commendable act on the part of Ipsos.

From the forum of Pakistan Advertisers Society, I appreciate the work Ipsos is doing in the realm of research and look forward to similar quality research projects surfacing in the days to come.

Khurram Masood Koraishy

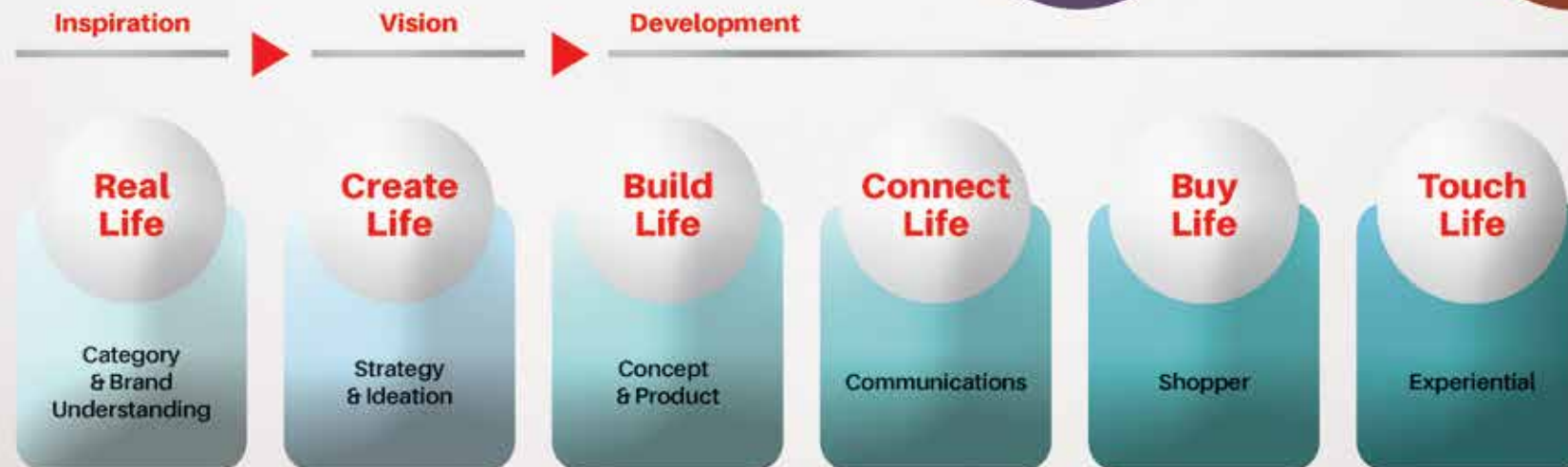
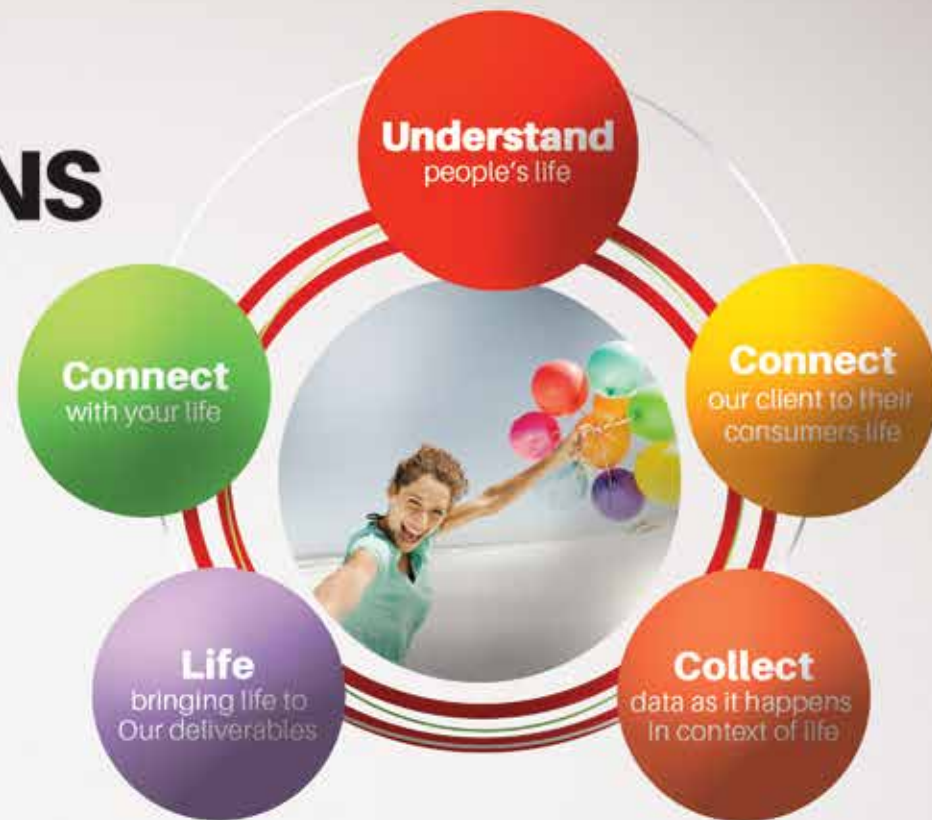
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Country Business Lead
Qualitative Research

T: +92 345 8227414
E: batool.ahmed@ipsos.com

GAME CHANGERS





DEMOGRAPHIC
PROFILE



Pakistan - Quick Facts

COUNTRY NAME: Islamic Republic of Pakistan

Administrative Units	Population	Area (km ²)
Punjab	55%	24%
Sindh	22%	16%
Khyber Pakhtunkhwa (KPK)	13%	9%
Balochistan	5%	40%
Federally Administered Tribal Areas	2%	3%
Gilgit Baltistan	2%	8%
Islamabad Capital Territory	1%	0.10%
Total Population	180 Million	

Approx. total number of Cities: **500**

Approx. total number of villages: **45,000**

Geographical Nomenclature of this Research

10 Key Cities (19% population residing) represents major urban segments of the country that includes Karachi, Hyderabad, Quetta, Lahore, Gujranwala, Faisalabad, Multan, Rawalpindi/Islamabad and Peshawar.

Rest of Urban (RoU) (15% population residing) includes 40 cities other than the key cities of Pakistan which constitutes a panel to represent Rest of Urban Pakistan.

Rural (66% population residing) represent the localities/villages of Pakistan. In BrandPuls (powered by CMI), 500 villages were selected to give a robust representativeness of rural segment.



Under 24 years

58%



25 - 54 year

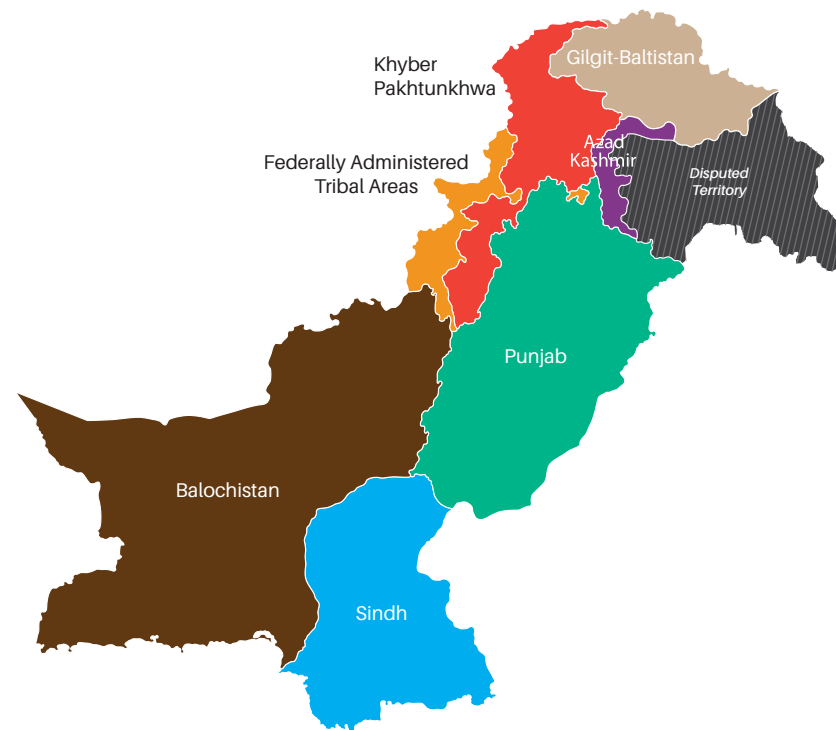
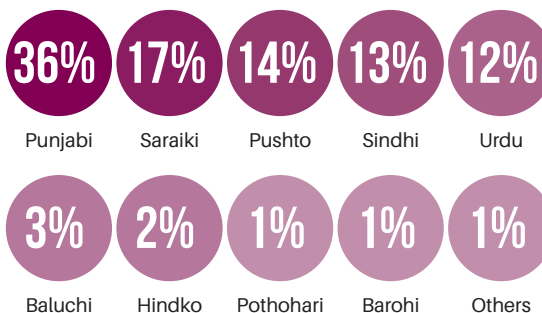
34%



55 +

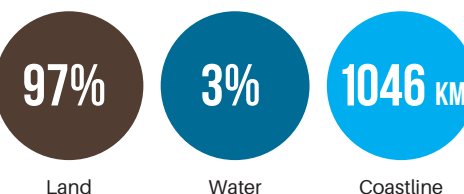
9%

Major Languages Spoken* - Overall Pakistan



Total Area of Pakistan

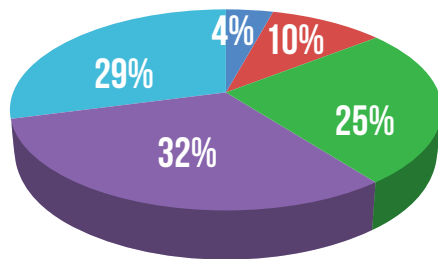
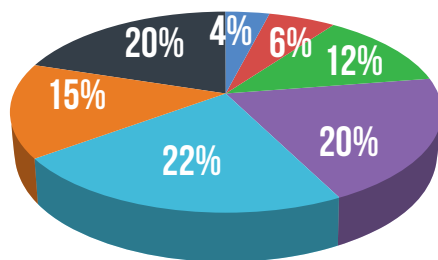
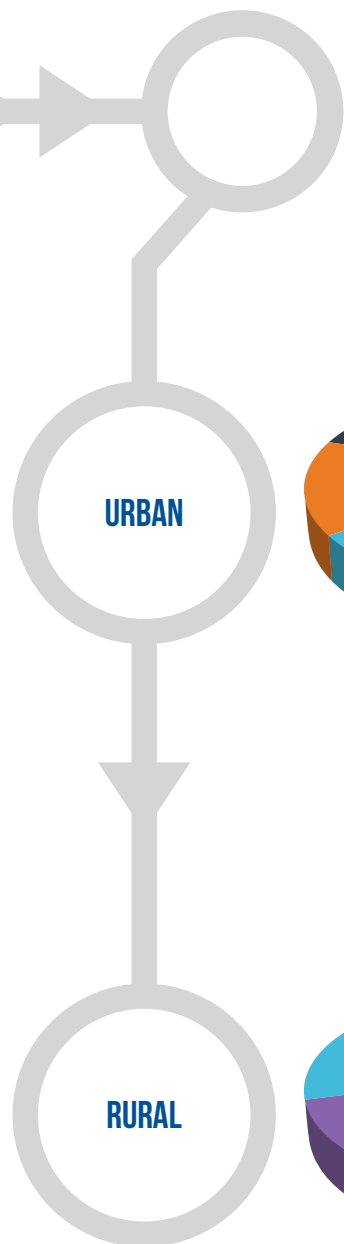
796,095 KM²



Borders

Total	6,774 km
Afghanistan	2,430 km
China	523 km
India	2,912 km
Iran	909 km

Soci-Economic Classification of Pakistan



- Sec A1** Well-educated, self-employed/employed professionals, senior level executive/officers in public/private limited organizations, well-educated medium to large-scale businessmen.
- Sec A2** Relatively less well educated, medium to large scale businessmen and professionals. Well educated middle level executives, small businessmen and supervisors.
- Sec B** Relatively less well-educated lower/middle level executives and officers, well-educated small businessmen and supervisors.
- Sec C** Predominantly small retailers/businessmen, supervisors and lower level executives who have 5-10 years of schooling.
- Sec D** Relatively well educated skilled workers; not so well educated small retailers and non-executive staff members.
- Sec E1** Skilled/unskilled workers, petty traders and non-executive staff members who have at least 5-10 year of schooling.
- Sec E2** Predominantly, illiterate unskilled/skilled workers and petty traders.

- Sec A** This is the most educated class in rural Pakistan where the education of the head of household is at least intermediate and the structure of house is either pukka lower or pukka upper.
- Sec B** A high percentage of individuals in this class have acquired education upto matriculation level and the structure of house is any one from all four types.
- Sec C** This is the middle class of rural Pakistan. Education level of heads of households is much lower than in SECs A and B.
- Sec D** This is the largest SEC in terms of number of households. Illiteracy among the heads of households is very common. Structure of house is either semi pukka or pukka lower.
- Sec E** Most of the heads of households in this class have not acquired any formal education. Structure of the house is kuchha.



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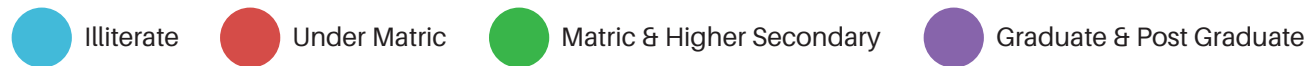
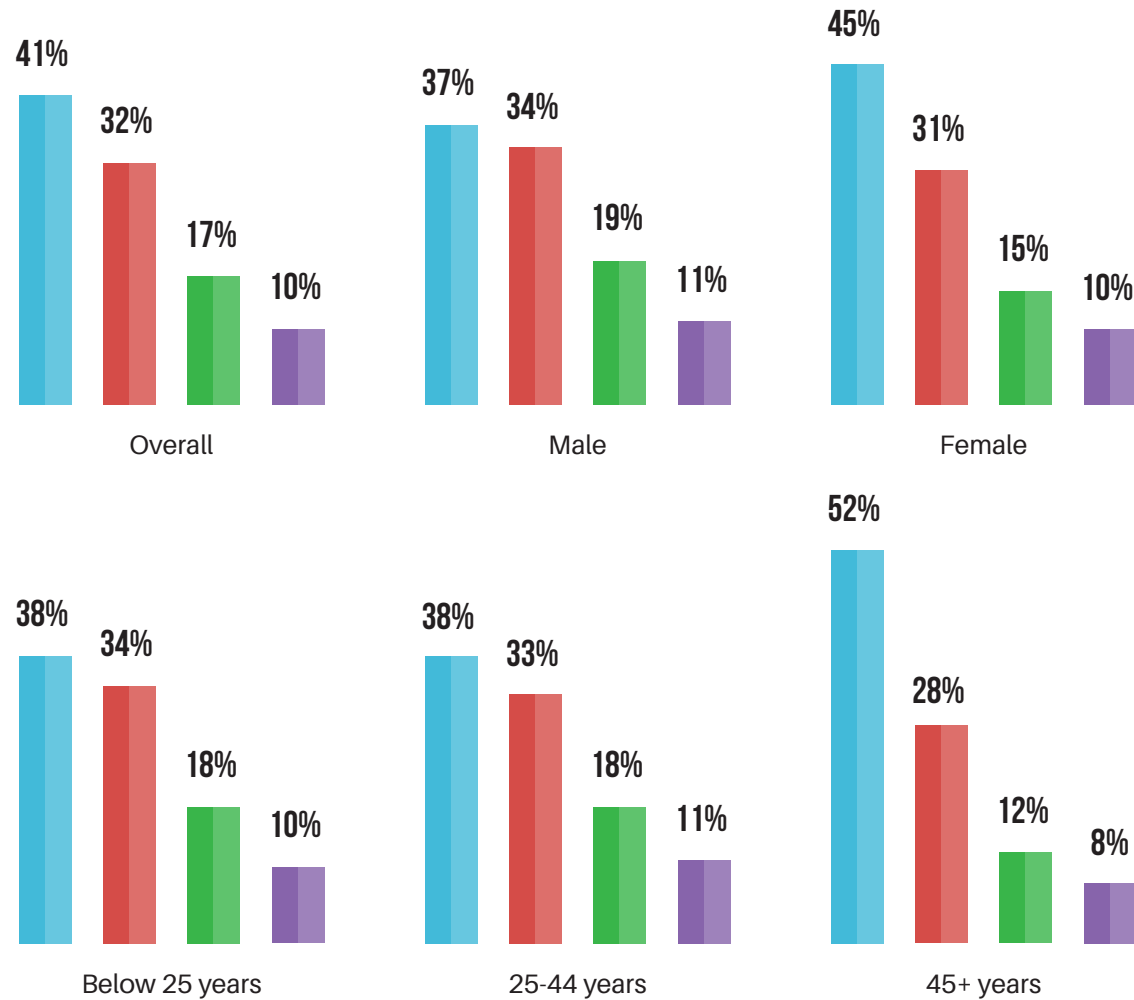
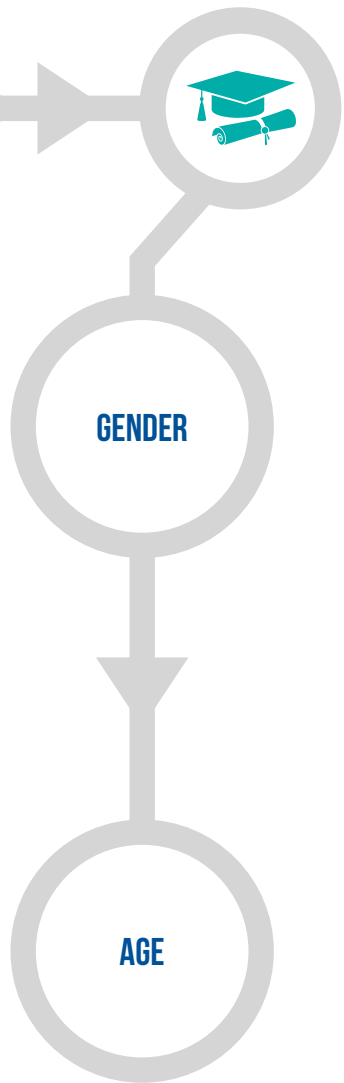
Along with the high quality of research and academics, students have opportunities to participate in student societies whose interests range from sports, dramatics and debating to community service, culture, adventure and arts, among many others. The secure university campus, spread over 100 acres, includes excellent on campus accommodation, world class sports facilities, a state-of-the-art library, a variety of dining facilities and much more. LUMS sports facilities are of the highest standard and there are more than 40 individual and team sports to choose from.



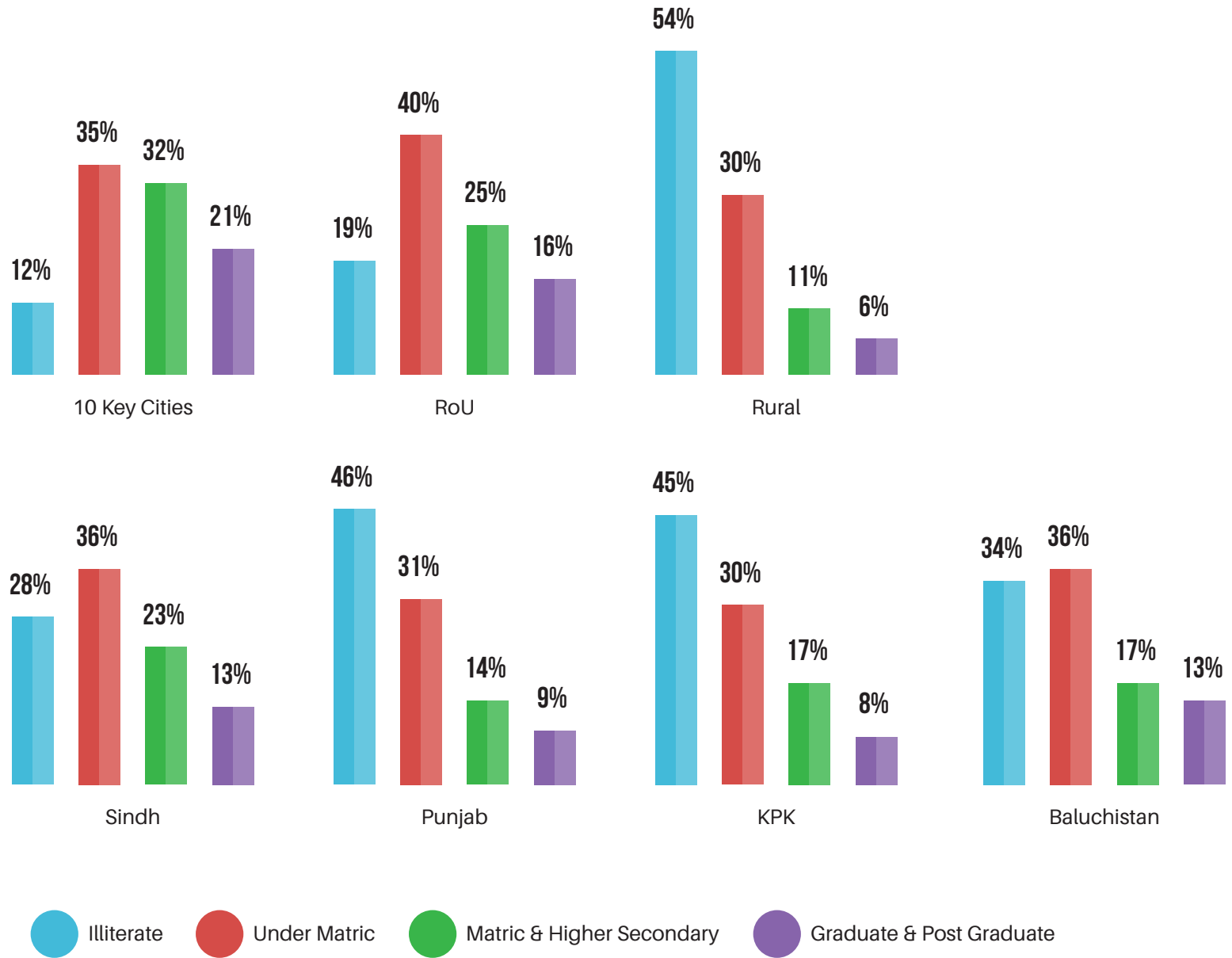
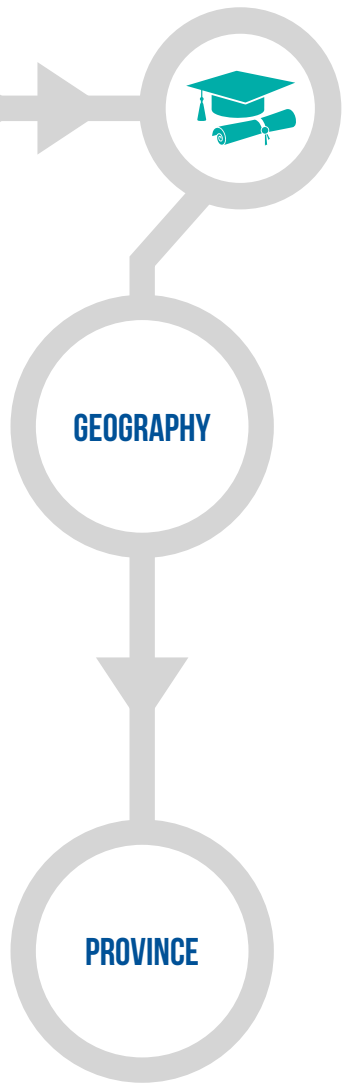
40%
students provided
financial assistance



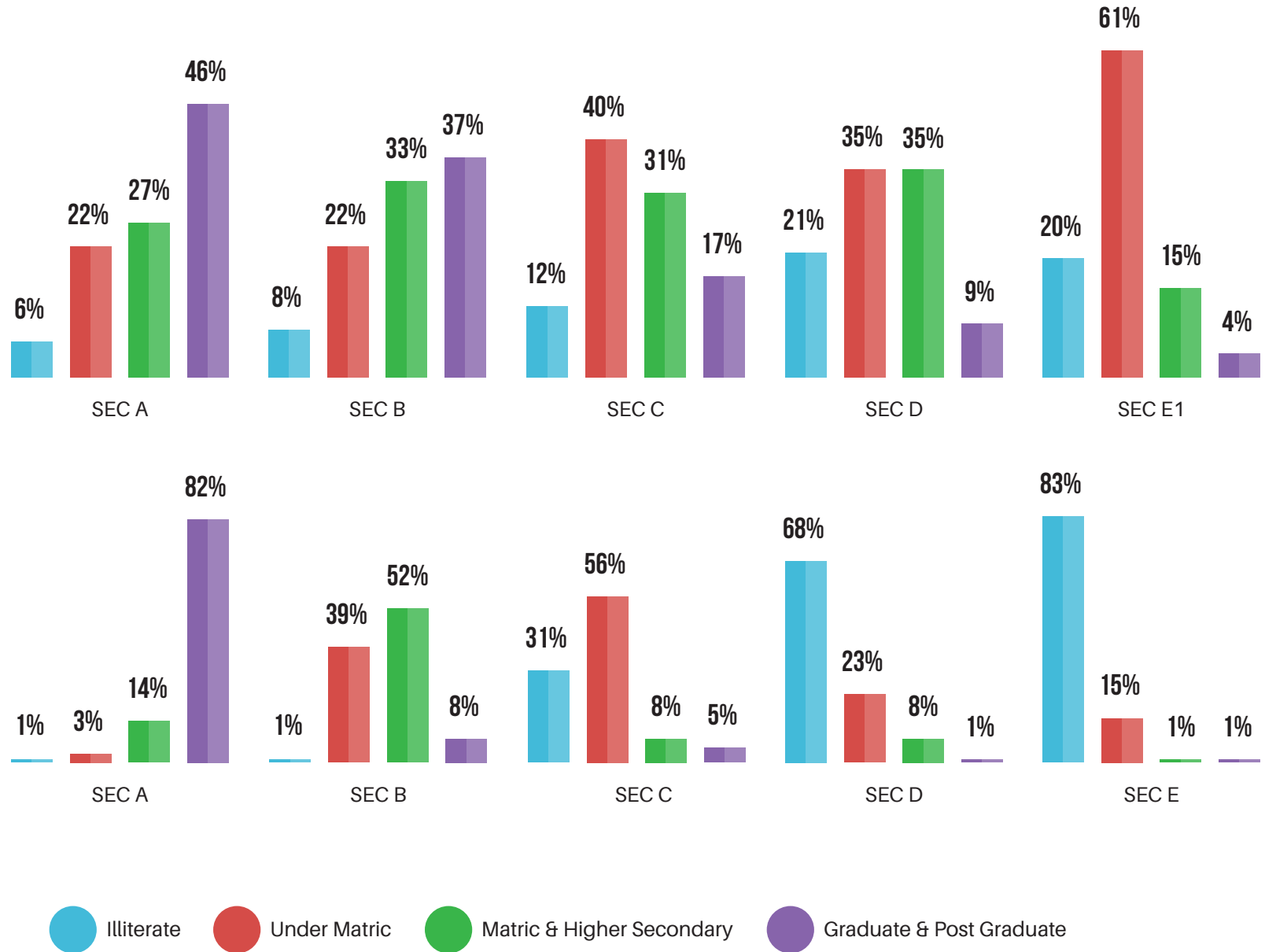
Educational Level - I



Educational Level - II



Educational Level - III



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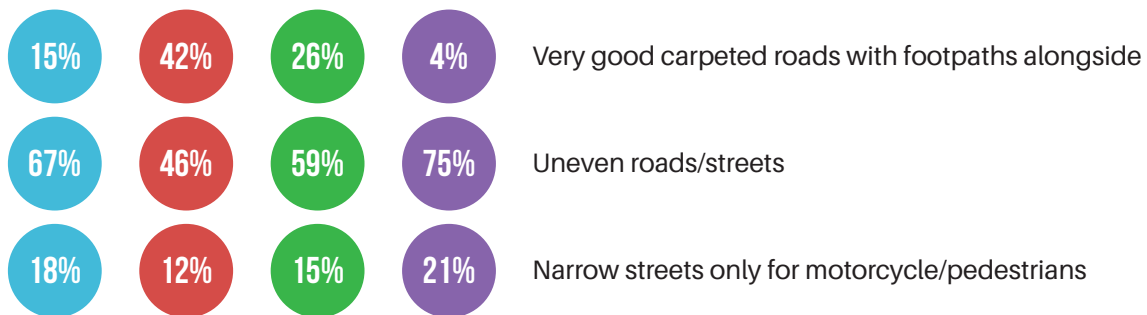


Housing Quality Indicators - I

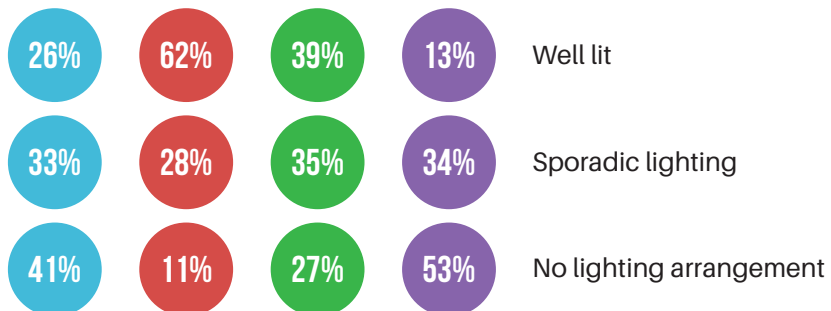


Housing Quality Indicators - II

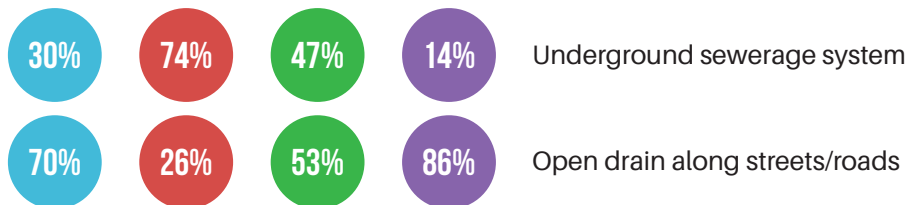
STREET TYPE



STREET LIGHTING STATUS



SEWERAGE SYSTEM





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For more information please contact:

Maimuna Shafaat

Country Business Lead
 MediaCT - Ipsos Pakistan

T: +92 345 8227313
 E: Maimuna.Shafaat@ipsos.com

GAME CHANGERS



The Imperatives of Knowledge Economy



My decades' long journey in the realms of advertising and marketing has convinced me that change is the only constant around. The pace, with which innovations define the new normal of the market place, is mind boggling. Hyper competitive players leave no stone unturned to engage their customers (and even non customers) through as many touch points as possible. At the same time, the cost efficient means and modes of customer engagement and experience management have become more cardinal game changers. Marketers are very well aware of the fact that their audience is trying to get rid of a deep sense of involvement and loyalty for their brands used most often. They are more experimental than their ancestors and a typical generic categorization of quantity vs. quality consciousness is no more valid.

Fortunately, I have been part of this transitional progression of the marketing profession and practices in Pakistan. Being affiliated with MAP provides me with the opportunities of staying in touch with the new dialects of this challenging domain. The significance of understanding highly fragmented target audiences in terms of consumer insights cannot be denied. The power of research drives the critical moves by the marketers to realize and achieve their business goals. Highly sophisticated research techniques and methodologies are being deployed in the developed part of this world to understand the customers' experiences and preferences. Time is not far away when the same will be inevitably required and practiced by marketing fraternity in Pakistan. In this backdrop, I truly appreciate this effort by Ipsos Pakistan to document consumers' insights in form of such an authentic publication.

I believe that such knowledge sharing platforms will bridge a divide between a dire need of knowing more about Pakistani consumers and a void of any publically available resources. As marketers, such publications will equip us with a much sought after toolkit to mend the ways we approach our intelligent and well informed target audiences. A holistic understanding of media & product consumption on the part of our consumers will pave path for laser sharp strategic interventions to meet our marketing targets. And this is exactly what this publication promises to impart.

Syed Masood Hashmi

President & CEO - Orientm McCann
President - Marketing Association of Pakistan (MAP)





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75%



Marriages with the consent of parents carry divine advantage

جوشادی ماں باپ کی خوشی سے
ہو جائے اسی میں برکت ہے۔

79%

73%

80%



The women especially the young ladies should wear cloaks/veils when they go out of home

خواتین بالخصوص نوجوان لڑکیوں
کیلئے اپنے گھروں سے باہر نکلتے وقت
پردہ کرنا یا سر پر چادر/اسکارف پہننا
بہت ضروری ہے۔

83%

78%

49%



In any matter, people give importance to my opinion

کسی بھی معاملے میں لوگ میری
راے کو بہت اہمیت دیتے ہیں۔

53%

47%

60%



Offering prayers is an important part of my daily routine

نماز کی باقاعدگی سے ادائیگی میرے
روزمرہ معمول کا اہم حصہ ہے۔

56%

64%



Urban



Rural



Male



Female

* Top 2 boxes are mentioned on 5 point rating scale

Psychographic Orientation - II

AGREED
RESPONSES*

43%



It's very important to look young all the times

ہمیشہ جوان نظر آنا بہت اہم ہے۔

53%

39%

80%



In addition to Eid Occasions, I like to celebrate other religious occasions like Milad un Nabi (Peace Be Upon Him), shub-e-barat, Giarwheen Shareef etc.

میں عیدوں کے علاوہ دیگر مذہبی تہوار، گیارہویں، عید میلاد النبی ﷺ اور شب برات وغیرہ کو اہتمام سے منانا پسند کرتا ہوں۔

85%

78%

76%



I am contented with my life as whatever it is

میری زندگی جیسی بھی ہے میں اس سے مطمئن ہوں۔

83%

73%

64%



I think it's peaceful in joint family

میرے خیال میں جوائنٹ فیملی میں سکون ہوتا ہے۔

69%

60%



Urban



Rural



Male



Female

* Top 2 boxes are mentioned on 5 point rating scale

Psychographic Orientation - III

DISAGREED
RESPONSES*

41%



Branded things are used
just for show off and to
impress others

برانڈڈ چیزیں صرف دکھاوے
اور دوسرے پر رعب ڈالنے کیلئے
استعمال ہوتی ہیں۔

40%

42%



Urban



Rural

41%



The customs and
traditions of our elderly
people are not practicable
in today's world

ہمارے بزرگوں کی روایات اور طور طریقے
آج کی دنیا میں قابل عمل نہیں ہیں۔

39%

42%



Male



Female

43%



Fashion is an integral
part of my life

فیشن میری زندگی کا لازمی حصہ ہے۔

46%

40%



* Bottom 2 boxes are mentioned on 5 point rating scale

Psychographic Orientation - IV

DISAGREED
RESPONSES*

77%



There is no harm in
meeting and friendship
between young boys
and girls

نوجوان لڑکے اور لڑکیوں کی دوستی اور
ملنے ملانے میں کوئی حرج نہیں ہے۔

46%



I like challenges in my life

مجھے زندگی میں چیلنجز پسند ہیں۔

41%



I believe in enjoying life
today and not to worry
about future

میرے خیال میں آج کو انجوائے کرنا چاہیے
اور کل کی فکر نہیں کرنی چاہیے۔

76%

79%

40%

49%

36%

43%



Urban



Rural



Male



Female

* Bottom 2 boxes are mentioned on 5 point rating scale

GLOBAL SOLUTIONS FOR LOCAL NEEDS



For further information please contact ►►

Syed Ahmer Hussain
Country Business Lead
Marketing

T: +92 345 8220525
E: Ahmer.Hussain@ipsos.com

GAME CHANGERS



A Page from the Notebook of an FMCG Student



Corporations need a healthy society to have a healthy business. Having a healthy business in an unhealthy society is not sustainable. Therefore, there is an increasing trend within the socially responsible organizations of doing well by doing good. Hence, doing good is no more a sacrifice but in the days to come, it's going to be those organizations' competitive edge.

What was a reason of pride in the past receives no attention today. Trust levels are going down. Today, 90% consumers trust peer reviews and only 20% trust advertising. And in search of truth; there are 2.5bn searches on Google every day, 1,000 Facebook posts/Tweets every second, shaping real time genuine stories. With the advent of social media, consumers are just beginning to realize the power they have. They are not expecting perfection but they are at least expecting transparency. In a transparent world, a consumer is not only a watch dog, a critic or a conscience but also a champion, a collaborator. Hence, transparency is no more a choice. The only choice is how brands deal with it - either it happens to you or you participate in it. Thus, clear is the new clever.

Amidst all uproar and political uncertainty that we witness every day, Pakistan is still one of the fastest growing consumer goods territories drawing keen interest of many global FMCG business conglomerates. As one of the youngest nations in the world, a market of close to 200 million people is ready to welcome innovative mitigation of their needs, wants and desires. Let's be open to them.

Amir Paracha

Vice President - Marketing, HPC
Unilever Pakistan Limited



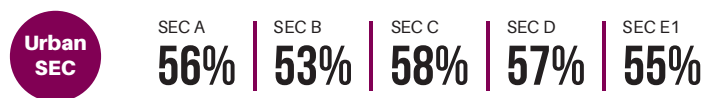
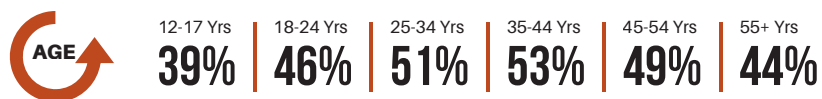


SHOPPING HABITS





Shopping Incidence



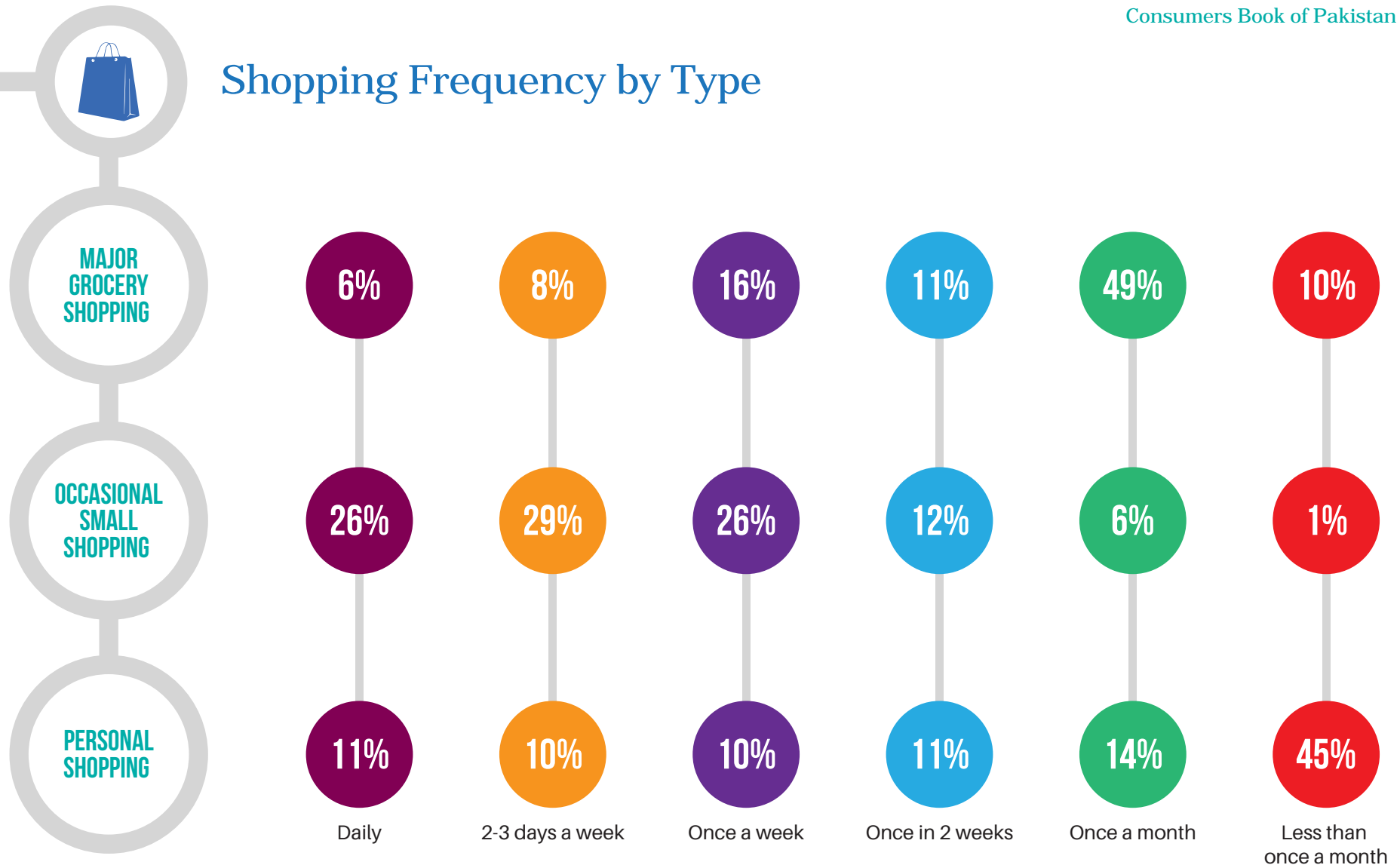


Shopping Type



Base: Shoppers

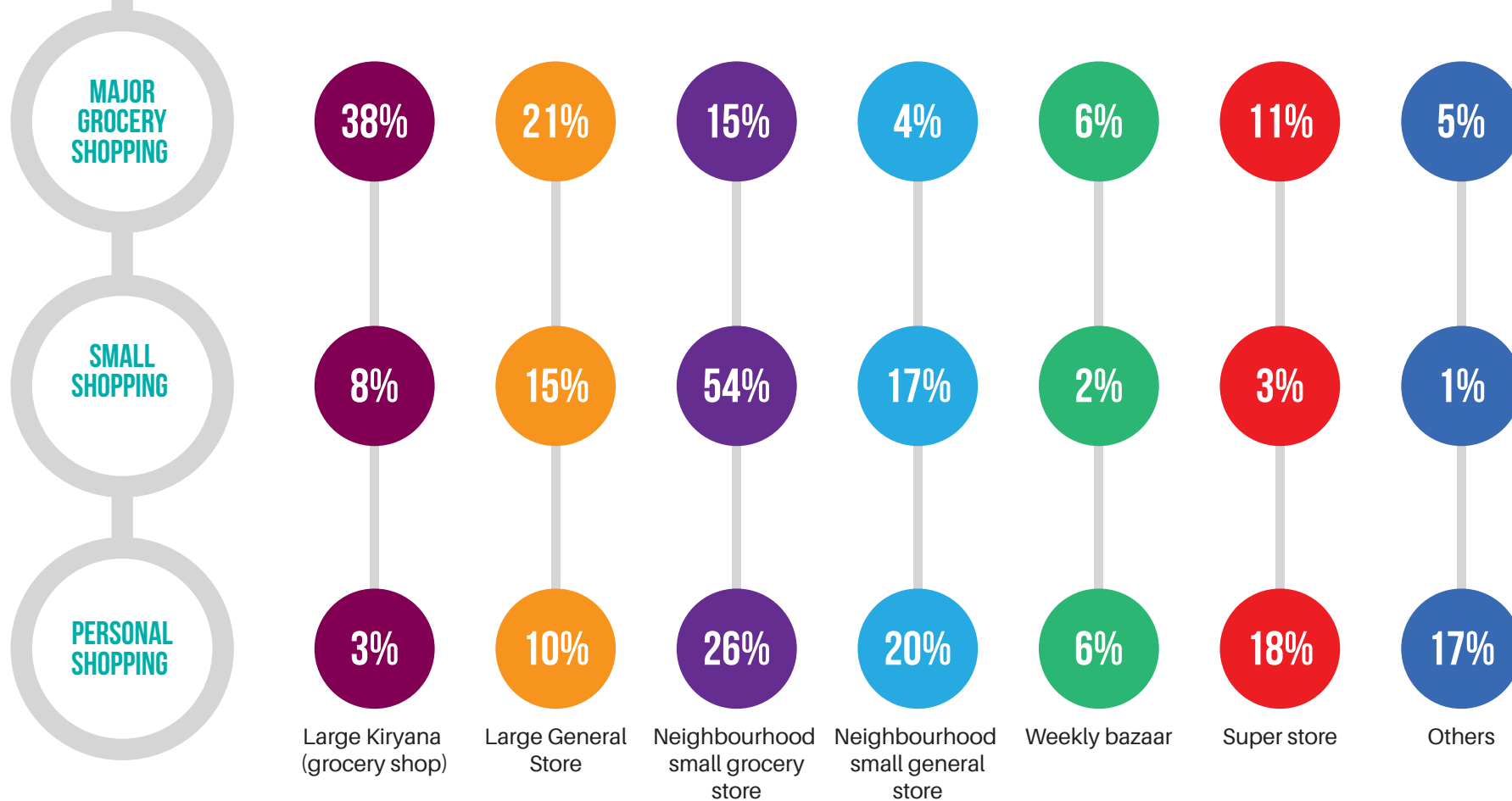
Shopping Frequency by Type



Base: Shoppers



Shopping Place by Type



What Makes Me a Proud Pakistani



Last year British Economist Jim O'Neill astounded the entire world when he stated that Pakistan is one of the Next Eleven and has a very high potential of becoming the 18th largest economy in the world by 2050 with a GDP of US\$ 3.33 trillion. Despite all the challenges, at the moment Pakistan is the 44th largest economy in the world with a GDP of somewhere around 225 billion USD. This means, if O'Neill's projections are correct, Pakistan's economy would grow 15 times in the next 35 years or so. Like other colleagues and industry professionals, I don't have an iota of doubt over this prophecy as this young nation has massive potential to contribute at global level. Reflection of current growing economy can also be seen in food and beverage industry of the country as this sector has seen rapid growth lately. Motives are wide ranging from increase in population to urbanization to moderately rising household spending. The food and FMCG sector has all the ingredients needed for sustainable growth. With its booming fundamentals, intense penetration and relative immunity to macro political and economic shocks, one can expect more competition and growth in food industry in days to come.

Despite fierce competition, this industry has managed to generate strong profits and is well-received by the local masses as well. Look at the number of new entrants in different categories ranging from Instant noodles, branded desserts confectionary, packed liquid milk, juices and the like. Consumers' pie is continuously expanding despite a picky tendency of local consumers.

I would be remiss if I don't mention the role of novelty inculcated by consumer companies within the branding realm. Recently not only new brands were launched but also some great creative communication campaigns were executed that has also strengthened consumers' trust on brand custodians. The said milestones shouldn't be witnessed in silo and could easily be compared to any of our regional counterparts within South Asian territory. As a marketer I foresee a better outlook for 2015 and beyond, as Pakistan is ranked high on the priority list of many national and multinational companies from investment and expansion point of view. Let's all work towards realizing this prediction sooner than 2050.

We should always remember that the best way to predict the future is to create it.

Best Regards

Ali Akbar

Director Marketing
Coca Cola
Pakistan & Afghanistan





A DAY IN
CONSUMER
LIFE



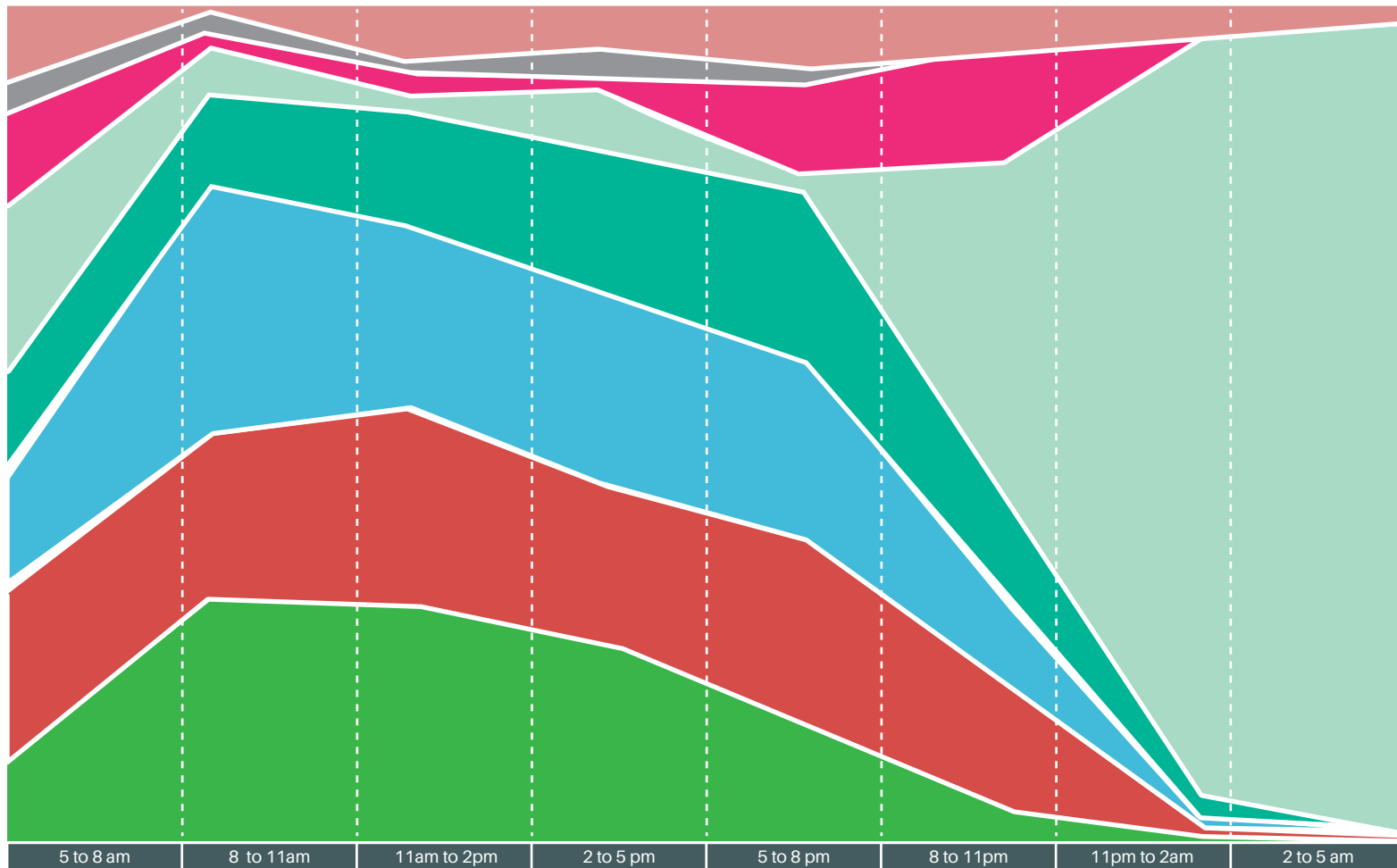
NEON
is
HERE



DO
THE
DEW



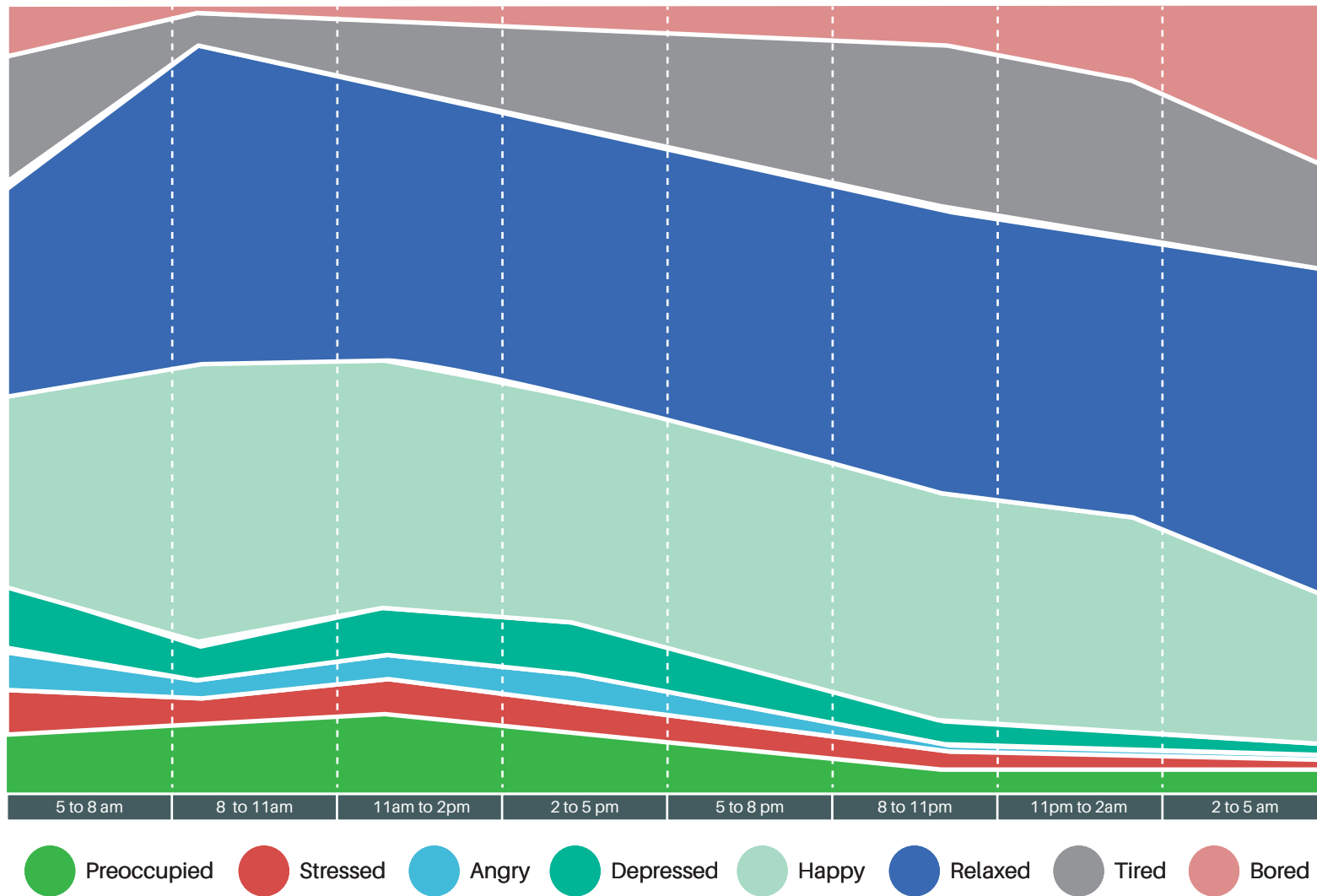
A Day in Consumers' Life - Overall Time Audit - Activity Scan Across an Average Day



● Working
 ● Socializing
 ● Household Chores
 ● Cooking/Eating
 ● Traveling
 ● Sleeping
 ● Prayer
 ● TV Time

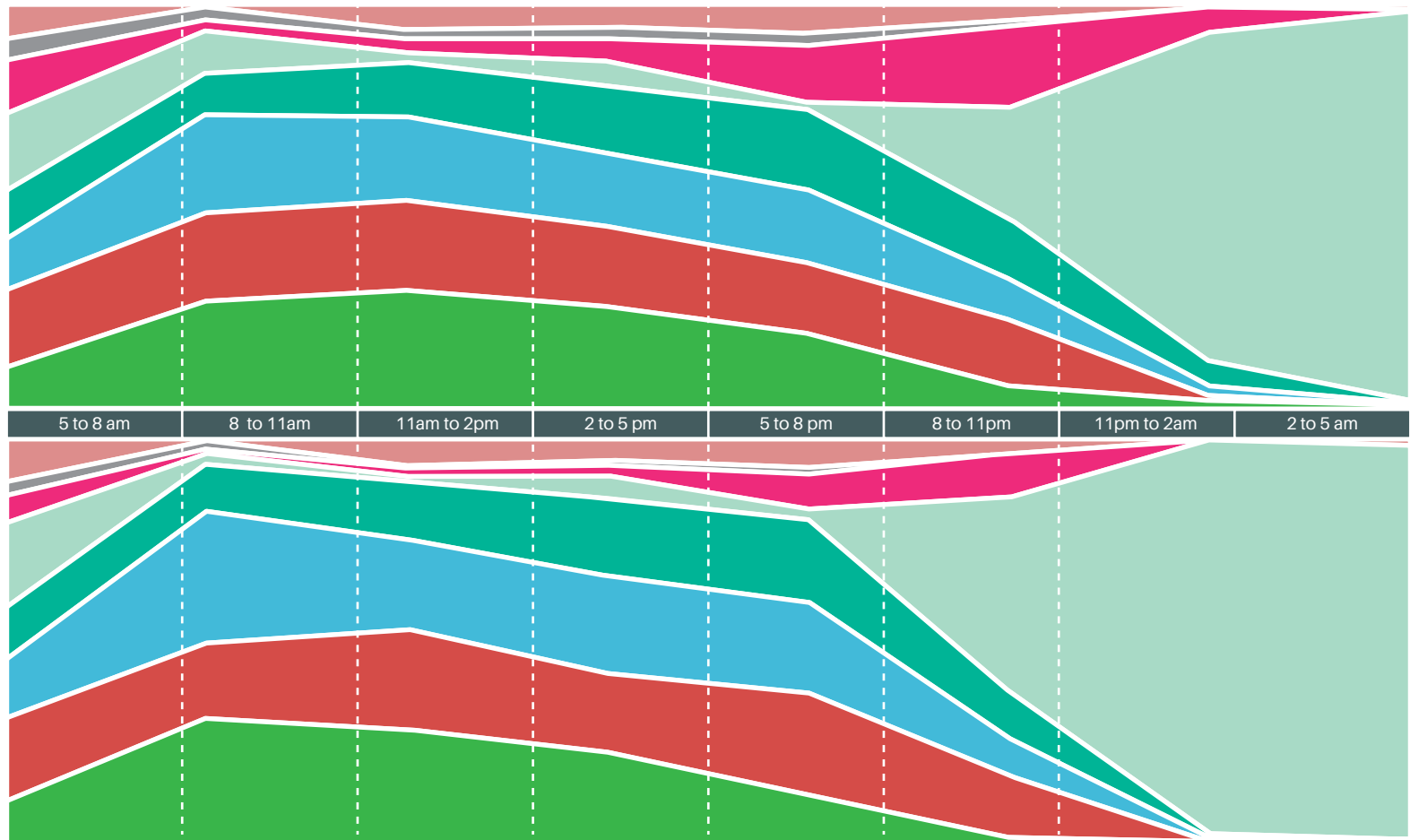


A Day in Consumers' Life - Overall Time Audit - Emotional Scan Across an Average Day



A Day in Consumers' Life - Geography

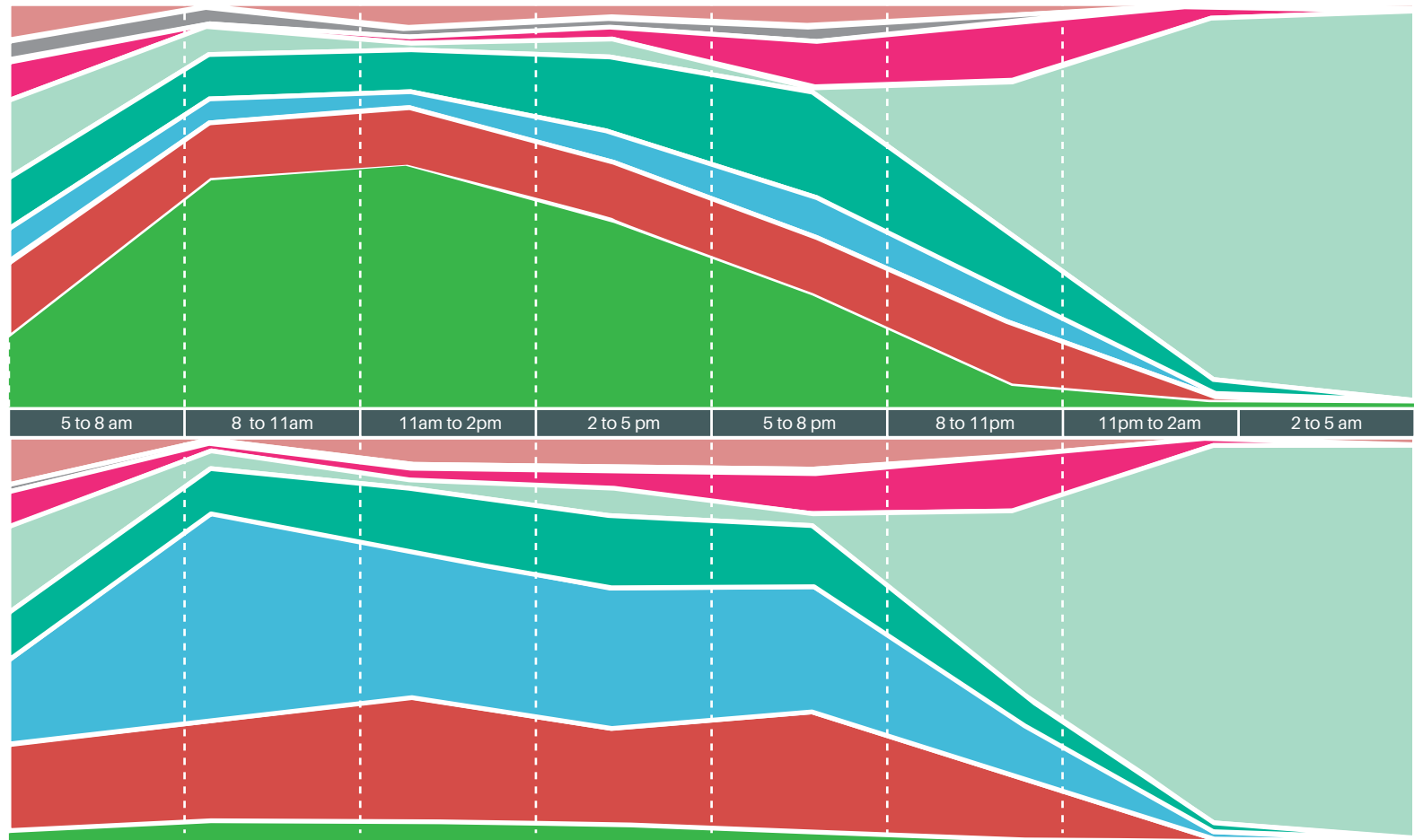
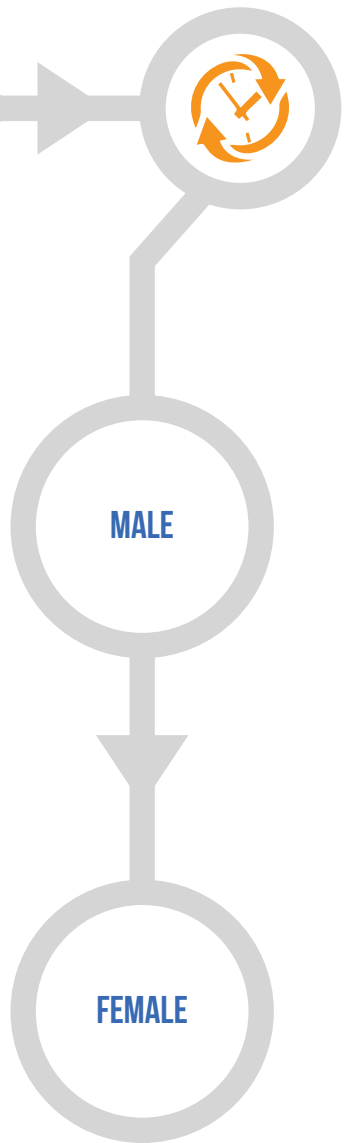
Time Audit - Activity Scan Across an Average Day



Working
Socializing
Household Chores
Cooking/Eating
Traveling
Sleeping
Prayer
TV Time

A Day in Consumers' Life - Gender

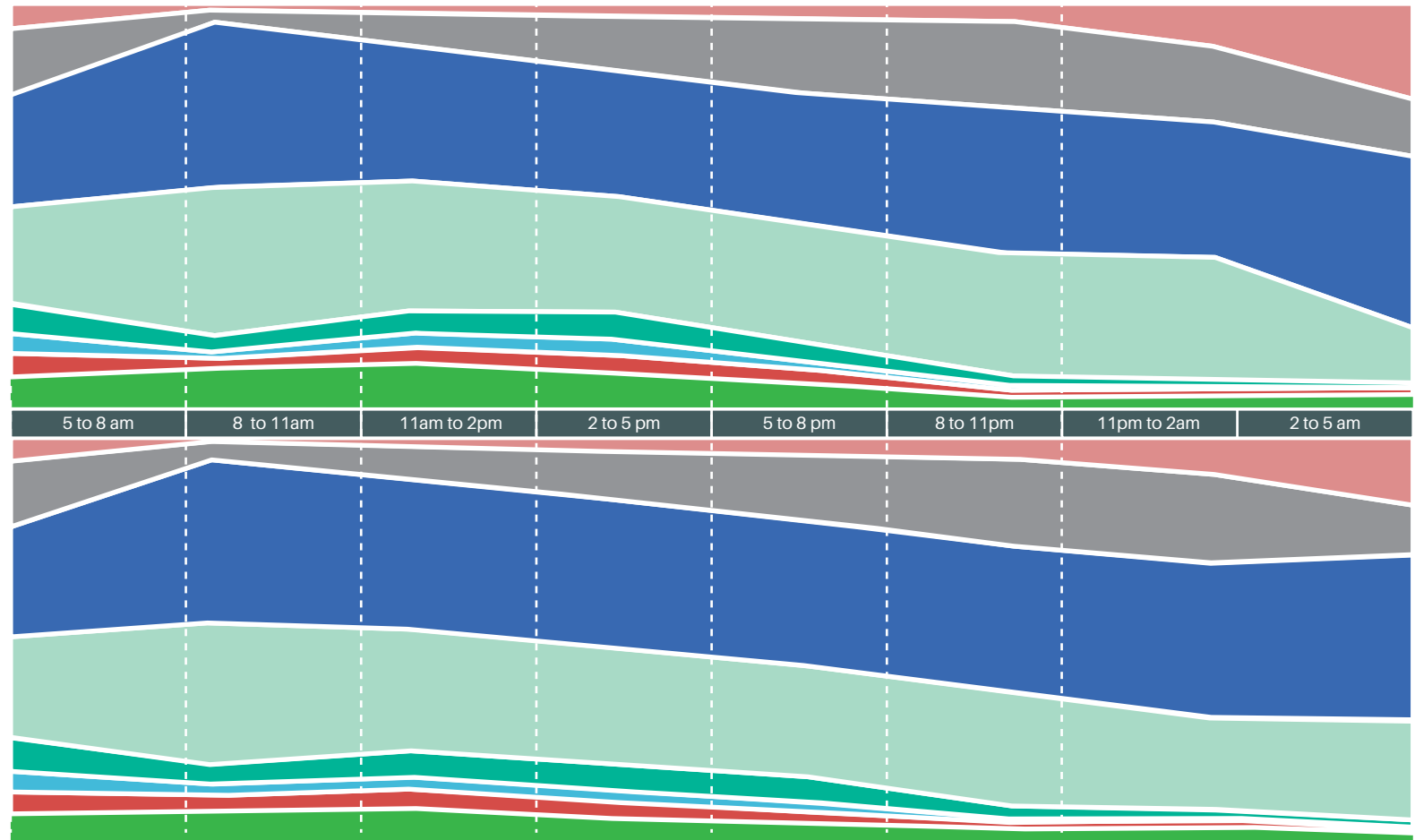
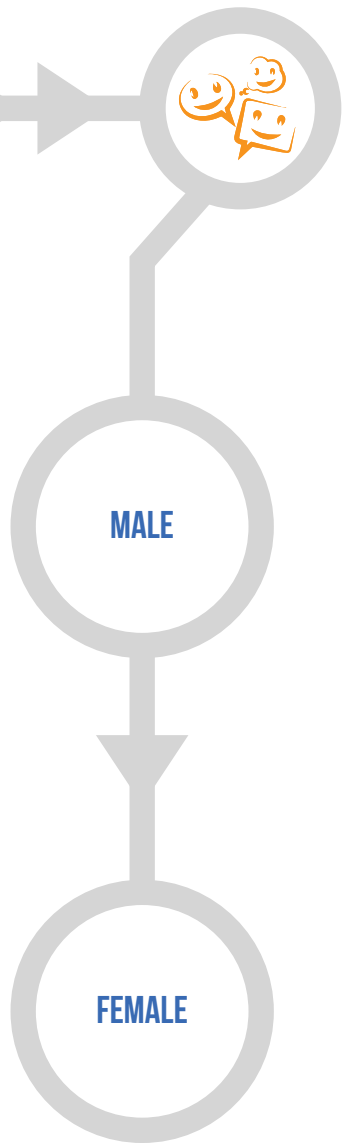
Time Audit - Activity Scan Across an Average Day



Working
Socializing
Household Chores
Cooking/Eating
Traveling
Sleeping
Prayer
TV Time

A Day in Consumers' Life - Gender

Time Audit - Emotional Scan Across an Average Day



Preoccupied
Stressed
Angry
Depressed
Happy
Relaxed
Tired
Bored

Ipsos ASI: BrandShout

An in-the-moment brand touchpoint app

Brands intersect with consumers' lives in more ways than ever before, yet there has been no way to measure those touchpoints beyond traditional research environments... until now.

ASI: BrandShout taps into the power of mobile to ask about brand experiences at the very moment they happen, letting you read how people react, respond, and interact with your brand - whenever and wherever those experiences occur.



A research tool that fits today's objectives



The future is mobile!





CATEGORIES'
DYNAMICS

Unlike most dandruff shampoos head & shoulders doesn't feel, or smell, like what you might expect from an ordinary anti-dandruff shampoo. Its special cleansing formula keeps hair clean to the roots and makes it beautiful. It's mild enough for everyday use; it will thoroughly cleanse your hair and nourish the scalp. You'll be left with up to 100% flake free hair that feels soft and fresh, light and easy to manage.

Unbeatable
up to **100%** dandruff
free*

What gives Afridi Unbeatable Confidence?

Representing Pakistan on an international level takes a lot of confidence to shine out amongst the rest. With a hectic schedule of matches, training and travelling, Shahid Afridi has little time for personal grooming. Always being in the limelight adds pressure and Afridi was looking for a quick fix to his dandruff problem.

“I feel that it is my duty to be a picture of professionalism as an athlete. Being self-conscious of my dandruff in the past always affected my confidence.

After using Head & Shoulders

I don't have to worry about dandruff anymore, it makes my hair 100% flake free that feels soft and fresh.

When my hair looks good, it allows me to focus on my game and gives me

Unbeatable Confidence.”



*upto 100% of visible flakes at 2 feet distance with regular use

Biscuit Penetration

OVERALL
80%

Male
83%

Female
77%



12-17 Yrs 91% | 18-24 Yrs 85% | 25-34 Yrs 81% | 35-44 Yrs 78% | 45-54 Yrs 72% | 55+ Yrs 67%



10 Key Cities
88%

RoU
82%

Rural
77%



Branded
90%



Unbranded
10%



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Lord of the Reds

Over 100 years of being the most awarded, the most exported.



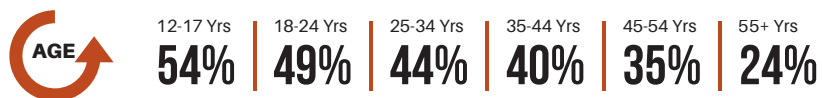
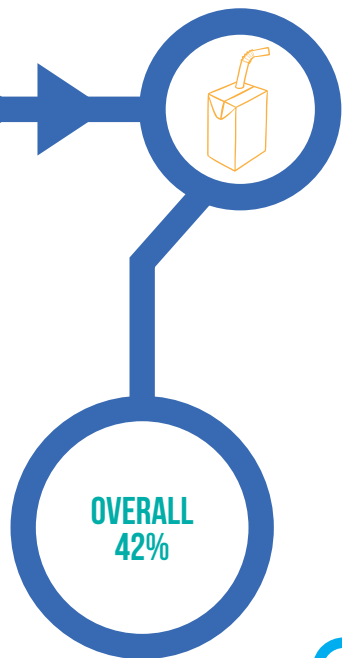
They say: quality speaks for itself. True. As the winner of the most awards, Rooh Afza continues to be the largest exported drink since 1982. We are proud to be the winner of hearts in Pakistan and abroad. However, the award we value the most is your continuing patronage in making us a loved brand worldwide.

Thank you for keeping us on the go.

Hamdard

Hamdard Laboratories (Waqf) Pakistan

Packed Juice Penetration



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)



The Legend Leads...

SOOPER



Sooper
hai Zindagi

Carbonated Soft Drink Penetration

OVERALL
84%



Male
88%



Female
81%



AGE
12-17 Yrs 88% | 18-24 Yrs 88% | 25-34 Yrs 86% | 35-44 Yrs 84% | 45-54 Yrs 82% | 55+ Yrs 73%



10 Key Cities 91% | RoU 89% | Rural 82%



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Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Colgate

Sensitive Pro-Relief™



Get **instant*** and
lasting sensitivity relief



* For instant relief, massage a small quantity on the sensitive tooth for one minute.



Tea Penetration

OVERALL
93%



Male

93%



Female

94%



AGE

12-17 Yrs

90%

18-24 Yrs

92%

25-34 Yrs

94%

35-44 Yrs

94%

45-54 Yrs

95%

55+ Yrs

95%



10 Key Cities

95%

RoU

93%

Rural

93%



Branded

81%



Unbranded

19%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Jitni zaroorat utna oil

No spills...No waste...No hassles!



Soya Supreme Leading the World in Safe & Healthy Oil Technology

Keeping up the tradition of innovation, Soya Supreme introduces the convenience of **'Press and Pour'** technology. It's easy to carry and easy to use. The oil is enriched to provide safety by protecting you from harmful bacteria and germs.

Press firmly for greater flow and softly for lighter. Enjoy complete control over your usage of oil. Pour directly in your cookware or spoon.



Tea Whitener Penetration

OVERALL
11%

Male 9% | Female 12%

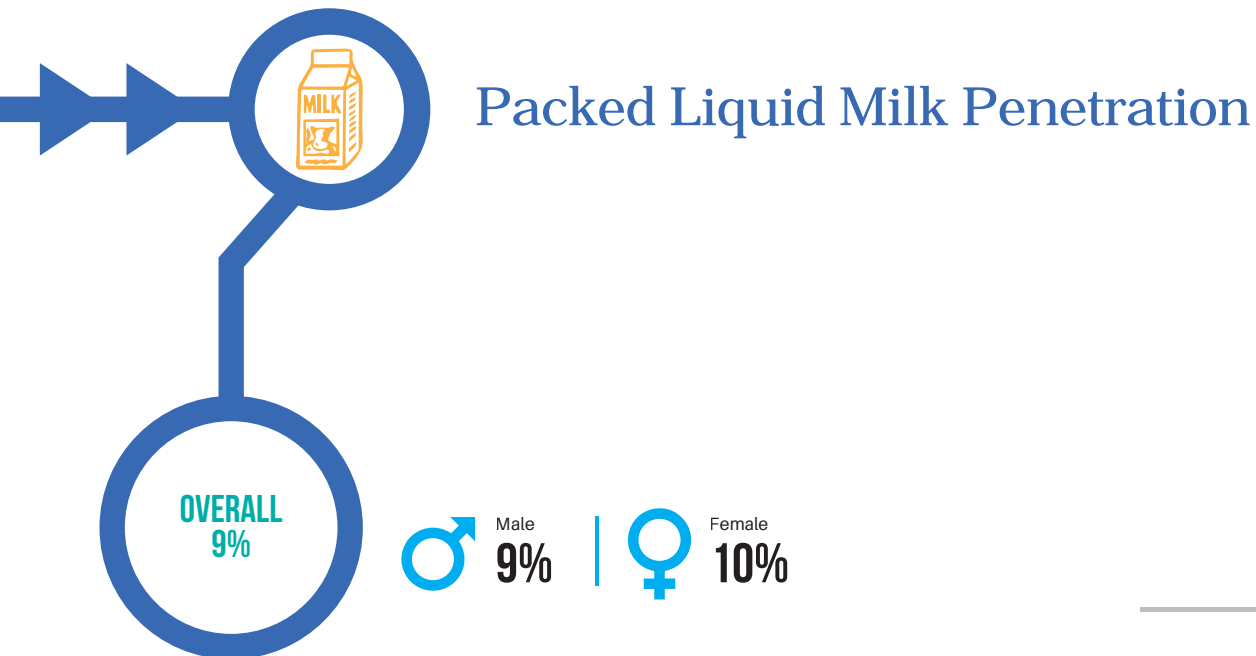
10 Key Cities 24% | RoU 10% | Rural 7%

Sindh 11% | Punjab 9% | KPK 17% | Baluchistan 5%



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

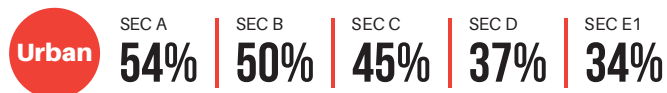


Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)



Spices Penetration



PACKED
SPICES
30%

LOOSE SPICES
70%

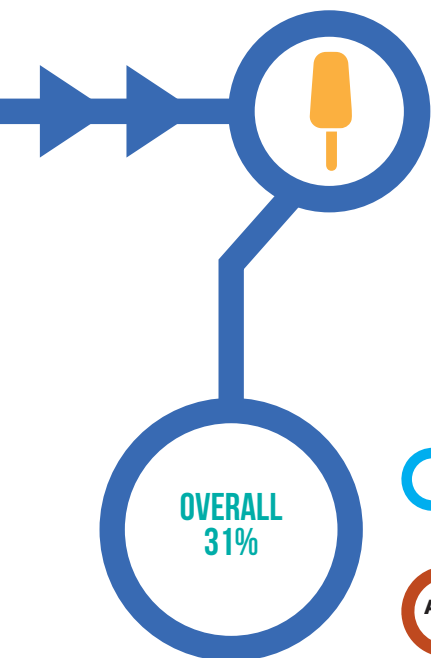
Instant Noodles Penetration



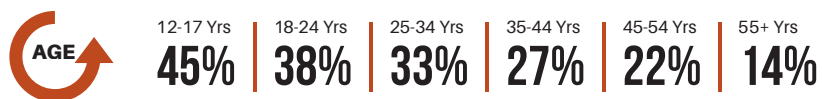
OVERALL
8%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)



Ice Cream Penetration

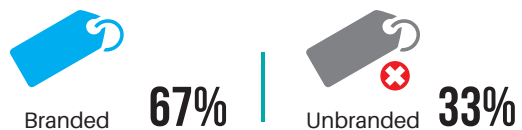
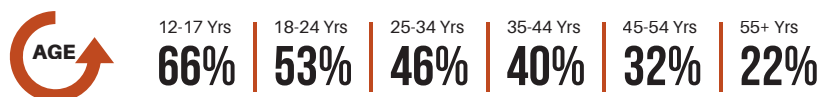


Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Salty Snacks Penetration

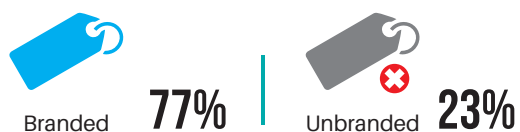
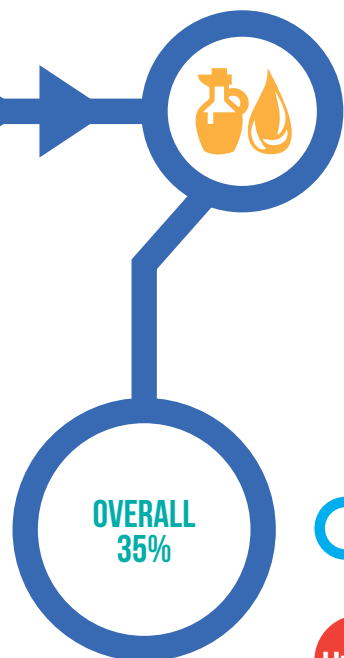
OVERALL
44%



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Cooking Oil Penetration



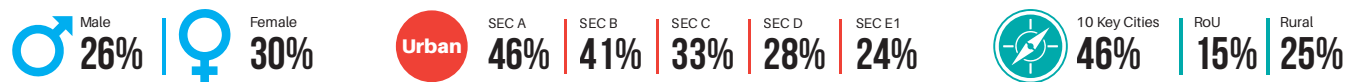
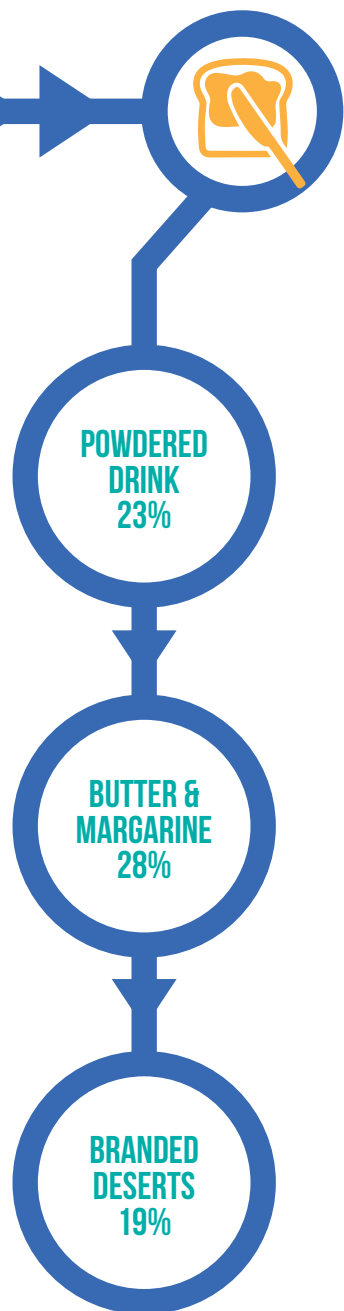
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

FROM THE FINEST
TEA GARDENS OF THE WORLD,
STRAIGHT TO YOUR TEA CUP!



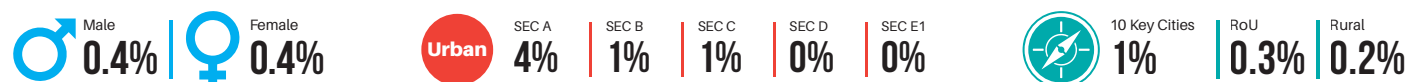
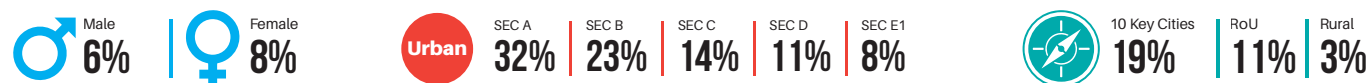
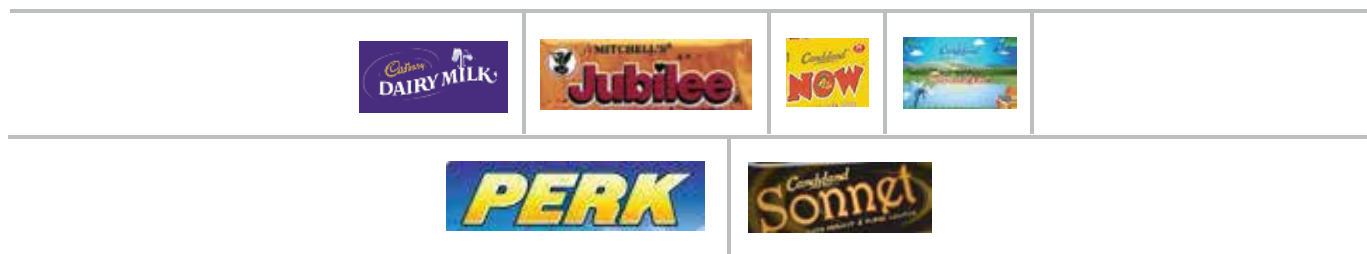
Other Food Categories' Penetration - I



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

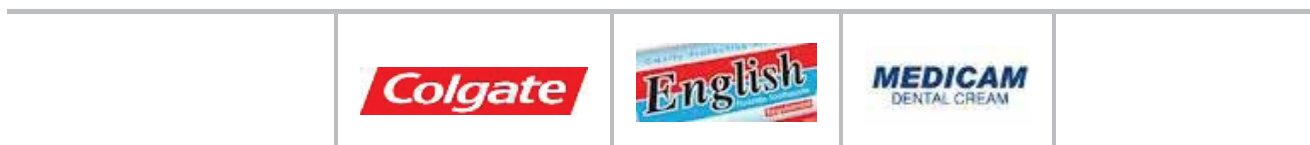
Other Food Categories' Penetration - II



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Personal Care Categories' Penetration - I



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Tarang's latest magnum opus



چائے کا سہی جور! 1 جوڑ!



Tarang has been spreading vibes of festivity across the nation inspiring its champion claim, 'Chai ka sahi jor' to 9 billion teacups in 415 towns. Being Pakistan's largest UHT brand, Tarang reaches out to the masses with monumental campaigns that emanate glamour, fun and frolic while associating big names from Pakistani cinema and the television industry.

Consumers have been highly responsive to their brightly lit and well executed TVCs which has helped Tarang grow as a brand. From previous campaigns highlighting the heroic spirit within everyone, bridging gaps between the separated, strengthening love bonds, adding perfection to lives, to the ultimate pride in the traditions of the east; all these aspects have been well incorporated in Tarang's communication.

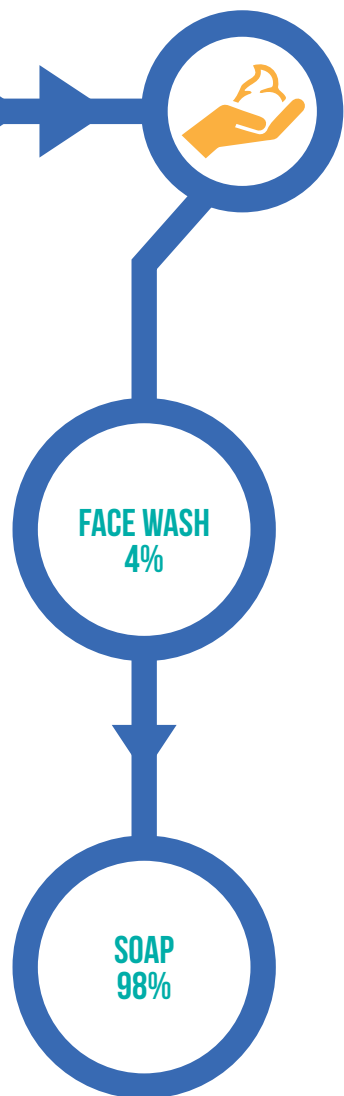
Since its inception, Tarang has been playing an active role in livening the Pakistani cinema, taking media initiatives such as 'Hero Banne Ki Tarang' 1 and 2 where unnoticed talents in Pakistan were given a chance to come to the fore, and also supported the film industry by providing it with fresh blood. Tarang brought 6 legendary films of the Pakistani cinema to life by creating remakes in Tarang Housefull, where films such as Devar Bhabhi, Anjuman and Aina were recreated. In a recent venture, Tarang gave its consumers the chance of experiencing the glamorous world of IIFA.

This time, Tarang unveils its new campaign that has a magnificent cast in which every individual stands as the heartthrob of many! Fahad Mustafa who is an emerging film star of Pakistan's motion picture fraternity and the

famous anchorperson from Pakistan's biggest game show 'Jeeto Pakistan'; Saima who is an evergreen diva from Lollywood, reigning hearts since decades; Mehwish Hayat who is one of the top models and film stars; Iman Ali who is Pakistan's top model, style icon and film actress; Shaan who is the King of Lollywood and hero behind the revival of acting in Pakistan's revamped film industry; and the legendary superstar and director of several films as well as television shows, Jawed Sheikh.

With the most idolized celebrities of multiple audiences from different generations, Tarang is all set to dazzle the screens once again. The drum rolls are definitely expected to be exciting this time with all the celebrities grooving to their signature tune. Let's see how Tarang ignites the spark this time!

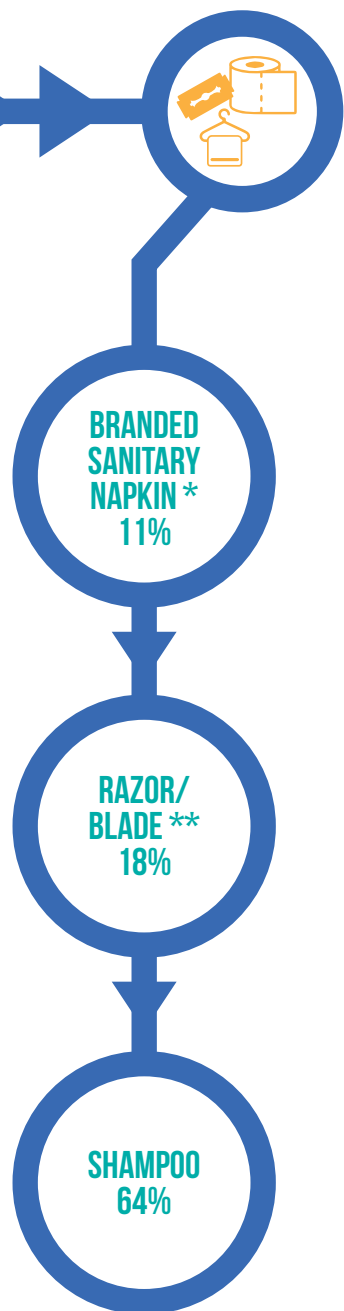
Personal Care Categories' Penetration - II



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Personal Care Categories' Penetration - III



SEC A

57%

SEC B

38%

SEC C

27%

SEC D

23%

SEC E1

13%



10 Key Cities

36%

RoU

18%

Rural

3%



SEC A

27%

SEC B

23%

SEC C

24%

SEC D

23%

SEC E1

19%



10 Key Cities

25%

RoU

21%

Rural

15%



Male

52%



Female

75%



12-17 Yrs

79%

18-24 Yrs

75%

25-34 Yrs

69%

35-44 Yrs

61%

45-54 Yrs

50%

55+ Yrs

31%



10 Key Cities

83%

RoU

75%

Rural

56%

Branded
99%Unbranded
1%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

* Base: Females

** Base: Males



SHINING ABOVE THE REST



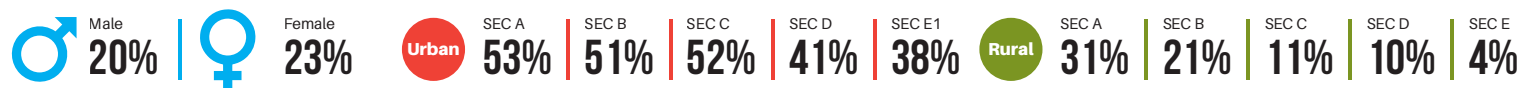
Since its inception, McDonald's Pakistan takes pride in the food it serves, which is why Quality, Service, Cleanliness and Value are the tenets we strictly adhere to for bringing you the best. Ours is an unprecedented ideology of offering food that is the very benchmark of internationally recognized and commended high standards. This is the reason why hundreds of thousands of people choose us every day.



www.mcdonalds.com.pk



Penetration of Baby Diapers



10 Key Cities

56%

RoU

33%

Rural

11%



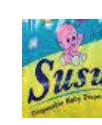
Branded

92%



Unbranded

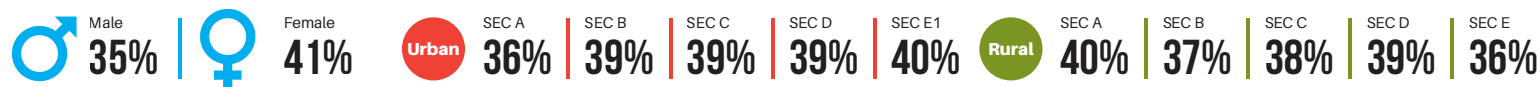
8%



Logos of the following brands are not found: A-One | Camery



Penetration of Analgesics



10 Key Cities

42%

RoU

35%

Rural

38%



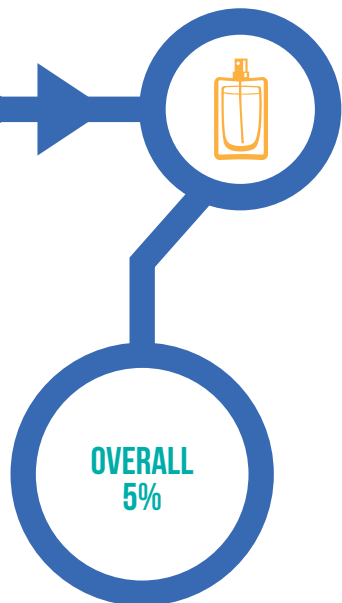
PONSTAN®

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

*Base: Parents of children below 6 years

Deodorant Penetration



Male

5%



Female

4%



SEC A

18%

SEC B

12%

SEC C

9%

SEC D

8%

SEC E1

5%



SEC A

6%

SEC B

4%

SEC C

3%

SEC D

1%

SEC E

2%



10 Key Cities

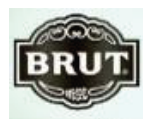
11%

RoU

7%

Rural

2%



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Insecticides Penetration

OVERALL
32%



Male

33%



Female

31%



SEC A

62%

SEC B

56%

SEC C

54%

SEC D

48%

SEC E1

48%



10 Key Cities

58%

RoU

45%

Rural

21%



SEC A

35%

SEC B

27%

SEC C

23%

SEC D

23%

SEC E

14%



Branded

89%



Unbranded

11%



Logos of the following brands are not found: Tiger | Phenyl

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Servis[®]

**SHOES FOR[™]
EVERYONE**

LIZA[®]

DON CARLOS[®]

NDURE[®]

SKOOZ[®]

CHEETAH[®]

CALZA[®]

tiz[®]

Household Care Categories' Penetration



**SURFACE
CLEANER**
36%

Male 37% | Female 35%

Urban SEC A 77% | SEC B 69% | SEC C 56% | SEC D 56% | SEC E1 51%

10 Key Cities 62% | RoU 55% | Rural 25%

Rural SEC A 49% | SEC B 37% | SEC C 30% | SEC D 22% | SEC E 15%

Branded 40% | Unbranded 60%



Logos of the following Surface Cleaner brands are not found: Singhar | Phenyl

Male 83% | Female 86%

Urban SEC A 97% | SEC B 97% | SEC C 96% | SEC D 96% | SEC E1 95%

10 Key Cities 98% | RoU 93% | Rural 79%

Rural SEC A 90% | SEC B 85% | SEC C 82% | SEC D 79% | SEC E 71%

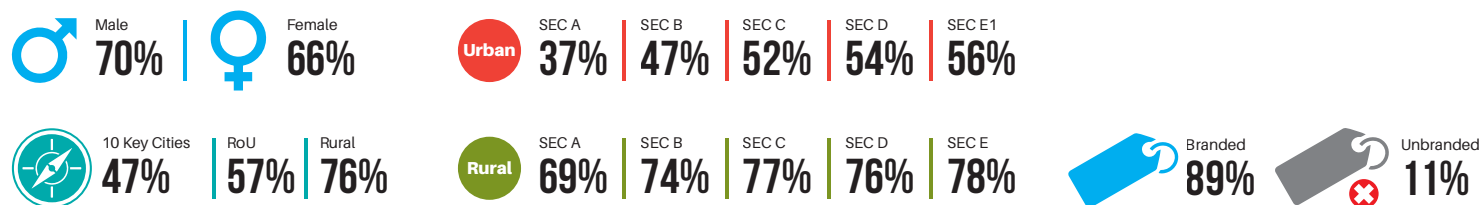
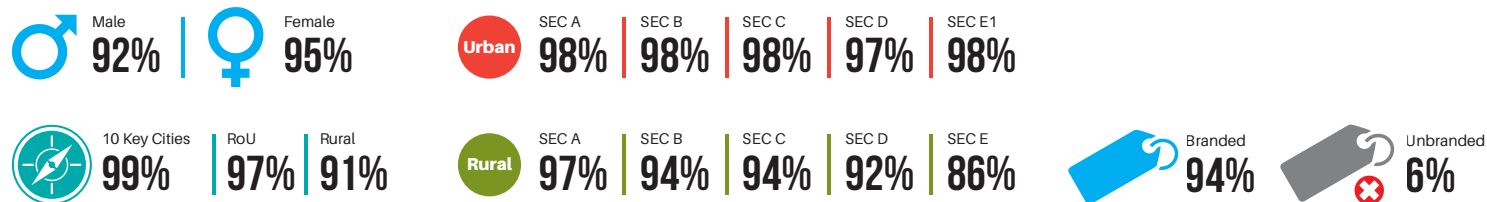
Branded 76% | Unbranded 24%



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Fabric Care Categories' Penetration



Logos of the following Laundry Soap brands are not found: Hari Soap | Danda Soap | Neel pari | Moli Soap | Shoukat Soap | Lado Soap

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)



Mobile Sets Penetration



NOKIA
Connecting People

QMobile

SAMSUNG

OVERALL
45%



Mobile Service Penetration



Mobilink

telenor

ufone

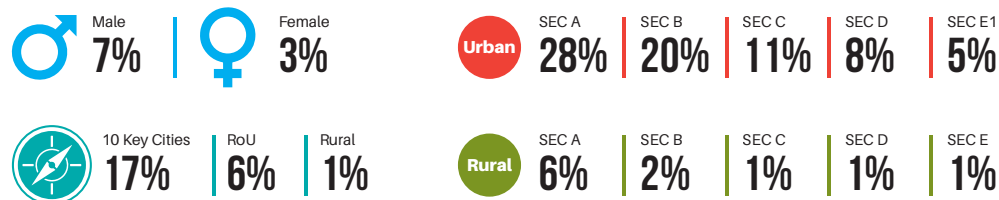
ZONG
Say it all

OVERALL
46%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Dining Out Penetration



OVERALL
5%



Logos of the following dining out outlets are not found: Al Maka restaurant | Almaida | Anar Kali | Bismillah Hotel | China town | Darbari | Dilpasand | Food Street | Ghausia | Green Hotel | Hamdani Hotel | Jan Broast | Javed Nihari | Jawa restaurant | Khan Baba restaurant | King Broast | Lahore Hotel | Mashaallah | Noman | Quetta | Shahzad Hotel | Sheraz | Tasty Palace | Yasir Broast

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

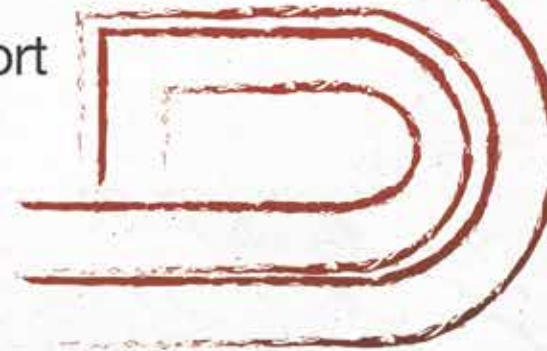
Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)



Our progress continues with your love and support

Through innovation and reliability,
Dawlance has risen to become
the 3rd most loved brand*.

Dawlance and You making Pakistan proud.



Dawlance
reliablehai.

Automotive & Lubricants Penetration



Male
30%



SEC A 52% | SEC B 58% | SEC C 47% | SEC D 39% | SEC E1 27%



10 Key Cities 46% | RoU 40% | Rural 24%



SEC A 55% | SEC B 38% | SEC C 30% | SEC D 20% | SEC E 12%



Male
3%



Female
1%



SEC A 19% | SEC B 5% | SEC C 2% | SEC D 1% | SEC E1 1%



10 Key Cities 4% | RoU 3% | Rural 1%



Male
29%



Female
1%



SEC A 36% | SEC B 28% | SEC C 21% | SEC D 18% | SEC E1 12%



10 Key Cities 22% | RoU 20% | Rural 11%



Branded
90%



Unbranded
10%

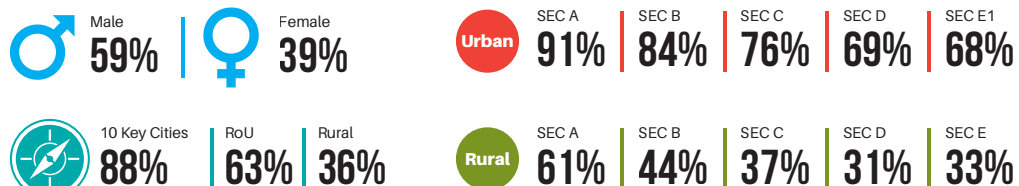


Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)



Branded Footwear Penetration



aerosoft
ORIGINAL COMFORT

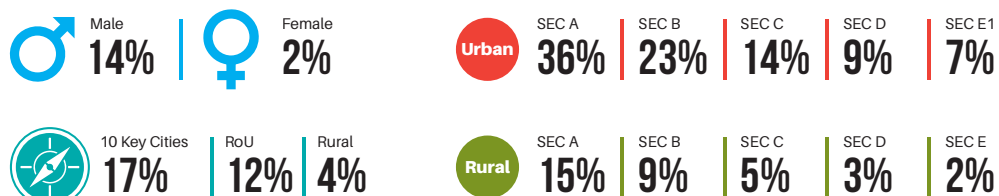
Bata

Servis
SHOES FOR EVERYONE

Penetration depicts purchase frequency of footwear; remaining respondents couldn't recall the last incidence of purchasing the said category



Bank Penetration



Allied Bank

HBL
HABIB BANK

MCB

NBP
National Bank of Pakistan

UBL
where you come first

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

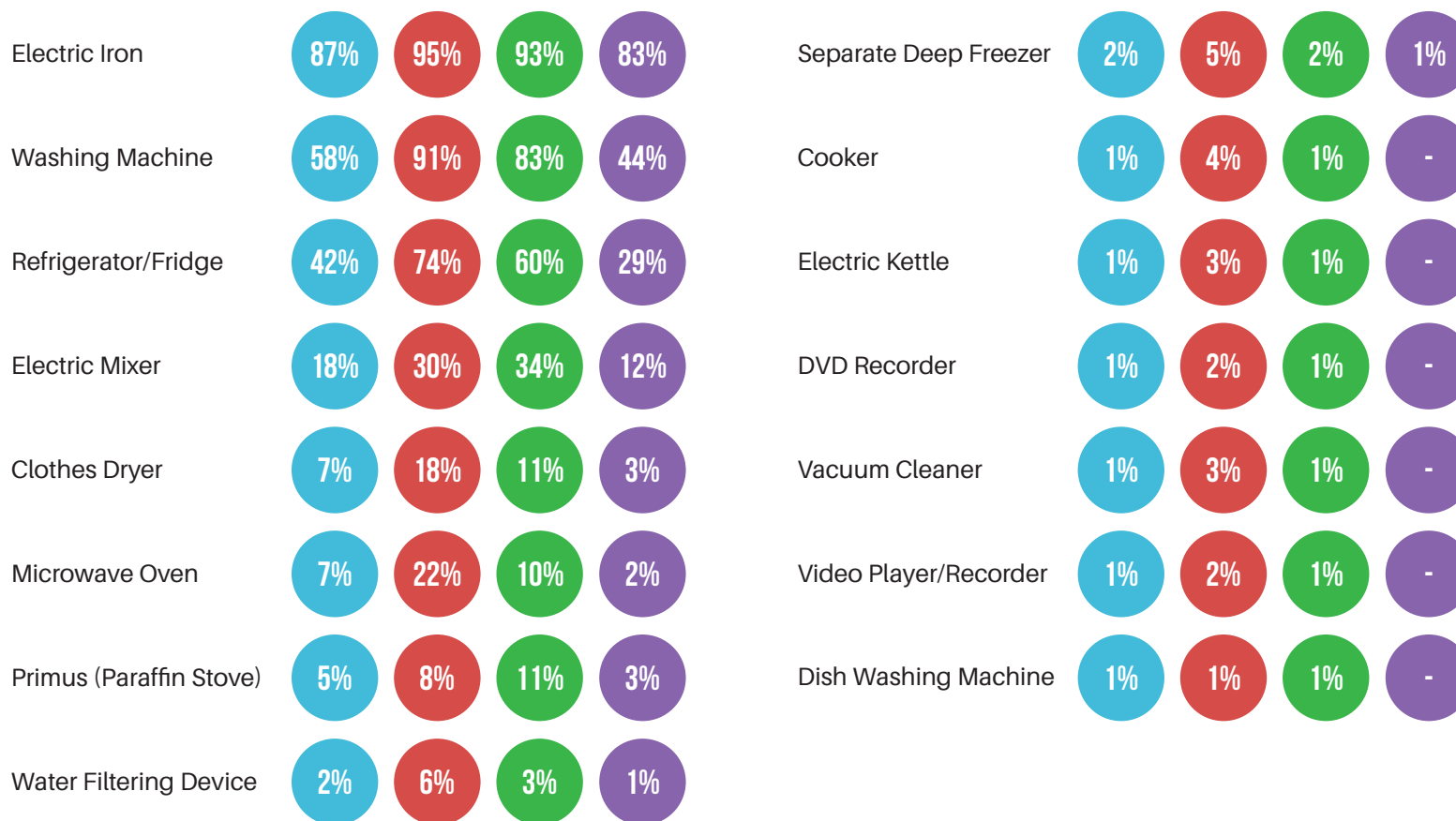


...on the move

...onward & upward



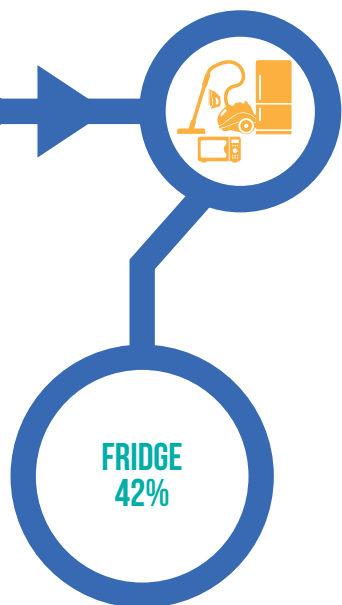
Durables/Home Appliances' Presence



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

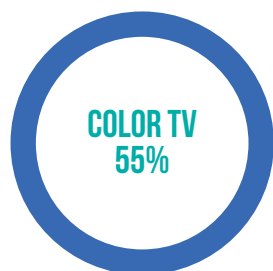
Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Home Appliances' Penetration



Dawlance

Haier



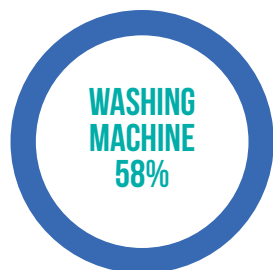
LG

National / Panasonic



PHILIPS

SONY



Dawlance

National / Panasonic



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Digitally Defined Directions - My 3D View



We are at a very exciting juncture in the evolution of creative communication strategy in Pakistan. Digital communication is becoming more and more relevant for our audiences. Big ideas are now being extended to and executed on this medium as well. In fact, globally some of the most effective manifestations of 'Big Ideas' are happening on digital.

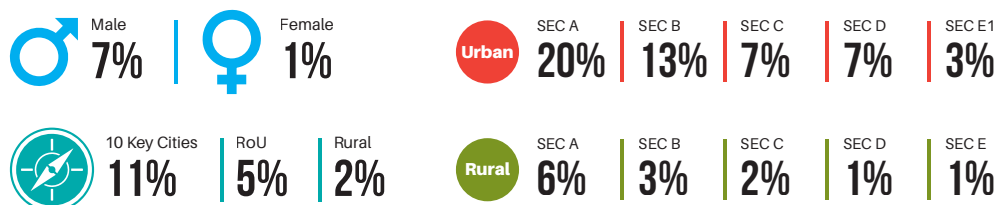
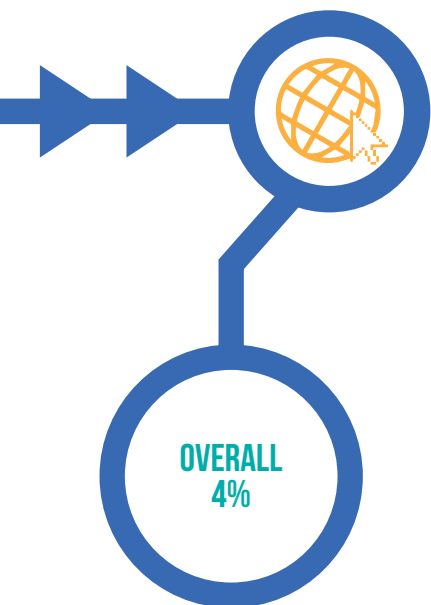
Some major brands in Pakistan are also making headway in this regard. It is our responsibility to equip ourselves with tools and resources required to keep our brands relevant and contemporary. It is time to change the way we work and more importantly the way we think.

Sabene Saigol

CEO
Red Communication Arts

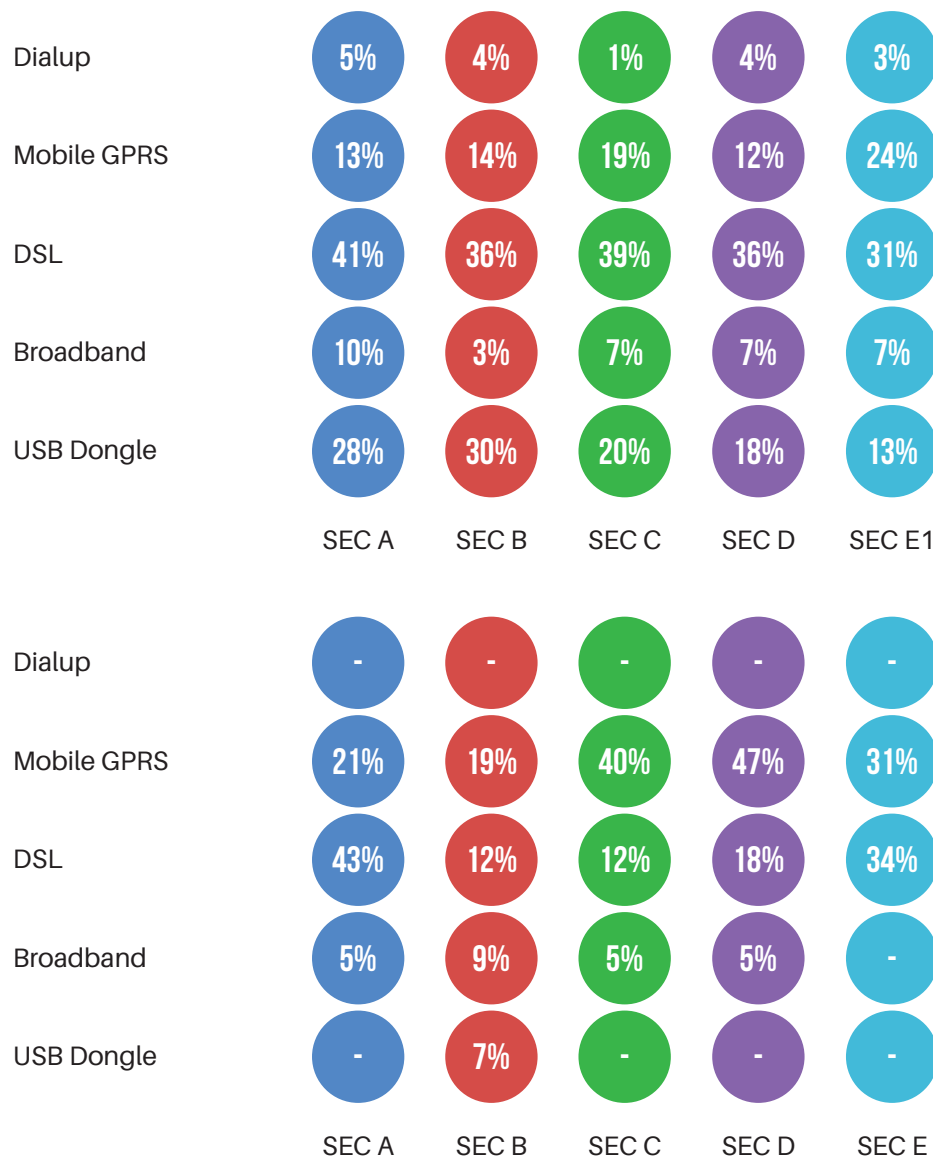
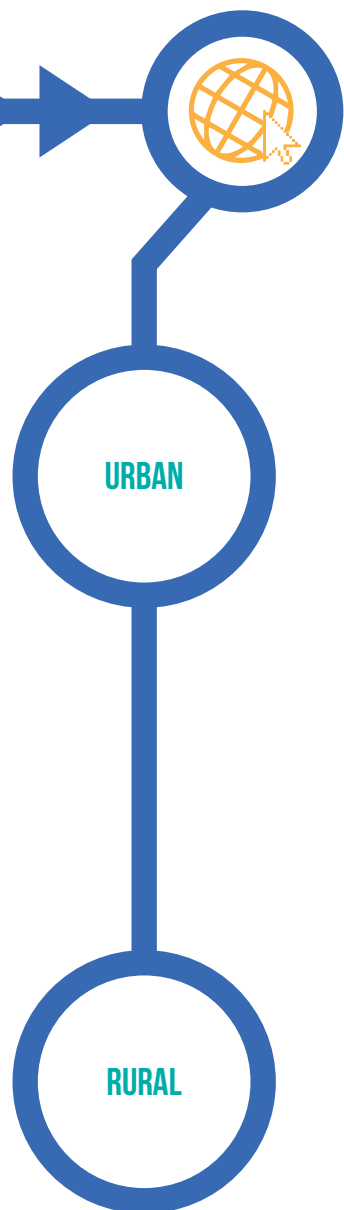


Internet Service Provider (ISP) Penetration

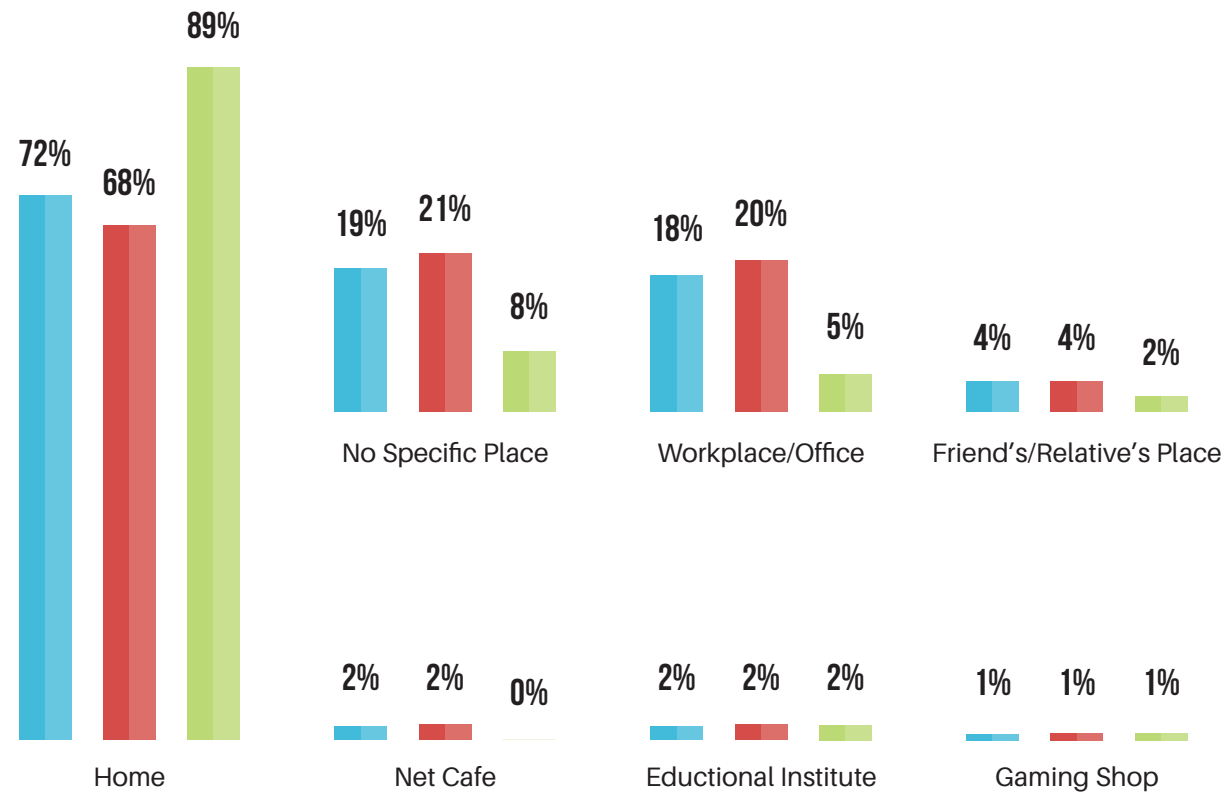
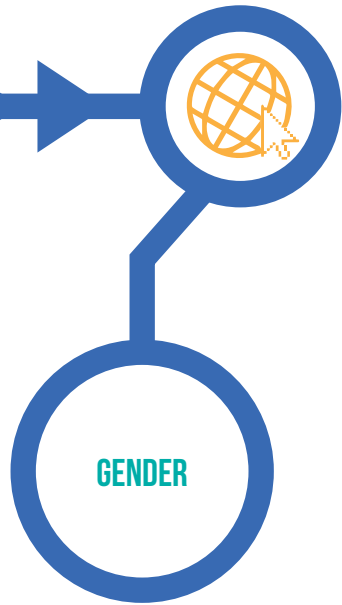


Logos of mobile service provider companies depict Internet usage via mobile internet facility

Type of Internet Connection Used

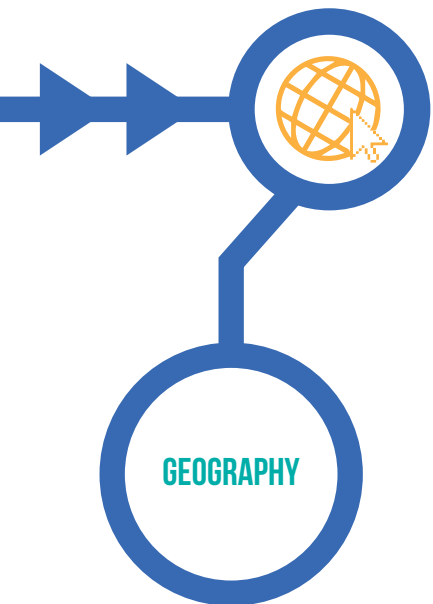


Place of Internet Consumption - I

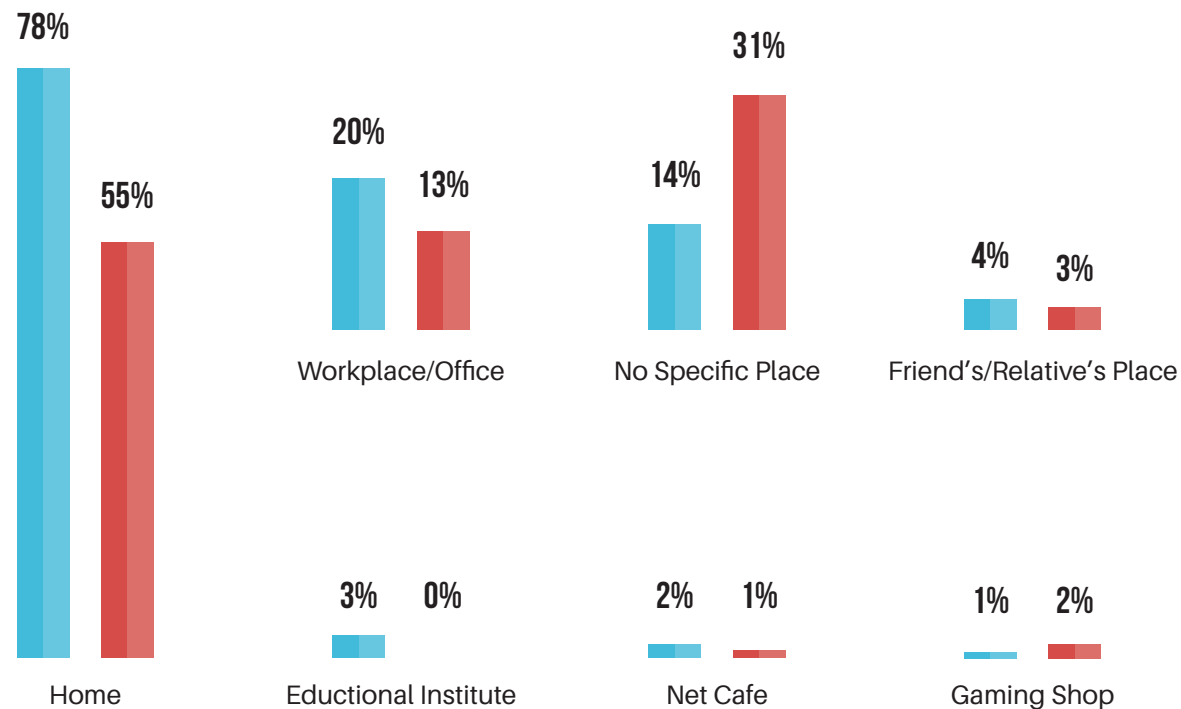


● Overall
 ● Male
 ● Female

Base: Internet Users



Place of Internet Consumption - II



Urban Rural

Base: Internet Users

Media Research – Optimizing the Cost Value Proposition



With the rapid evolution of the communication landscape in the last decade, integrating advertising messages across multiple media options has become critical to Brand advertising strategy. More so, with the advent of connected media, understanding how consumers behave across vehicles, devices and connections is essential. More Brands spend more money looking to reach more people each year, competing in limited spaces and avenues. Amidst this ever-increasing clutter, identifying the effective and efficient vehicles is the key to providing maximized value to advertisers.

Marketing professionals are expected to thoroughly understand the habits and lifestyle of their consumers. Further, communication specialists must acquire in-depth knowledge of how these consumers engage with each medium in order to create the efficacy and productivity required for success. Access and availability of cross-media research assists in accruing the requisite knowledge to gain deeper insight into consumers. The data can also help advertisers expand their commercial pursuits in Pakistan, accordingly.

The dearth of such research has historically hampered the optimization of media utilization in Pakistan. The challenge was to design, execute and measure campaigns without sufficient tools. While independent medium measurements existed, connecting the dots was left up to “gut feel.” Experience and past learning had become the standard to evaluate effectiveness. There was a void in marketing and consumer research that needed filling.

Ipsos’s BRANDpuls aims at filling the gulf and establishing a common media currency, a reliable source of gauging efficacy. This single system provides insight into multimedia consumption, engagement and audience profiles for advertising professionals to be able to devise a targeted cross-media strategy. In today’s dynamic, evolving media universe, this research serves as the go-to tool for evaluating options, allocating resources and assessing efficiency.

Farhan Qureshi

CEO
Starcom Pakistan





Multimedia Outlook

Definition & Abbreviation

REACH

Daily Reach refers to the estimated total number of different people exposed to a medium at least once a day.

Weekly Reach refers to the total number of different people exposed, at least once in a week.

Monthly or Longer Ago Reach refers to the total number of different people exposed, to a medium at least once in a month or earlier.

GEOGRAPHY

Metros are metropolitan cities of Pakistan i.e. Karachi, Lahore and Islamabad/Rawalpindi

10 Key Cities (19% population residing) represents major urban segments of the country that includes Karachi, Hyderabad, Quetta, Lahore, Gujranwala, Faisalabad, Multan, Rawalpindi/Islamabad and Peshawar.

Rest of Urban (RoU) (15% population residing) includes 40 cities other than the key cities of Pakistan which constitutes a panel to represent Rest of Urban Pakistan.

Rural (66% population residing) represent the localities/ villages of Pakistan. In BrandPuls (powered by CMI), 500 villages were selected to give a robust representativeness of rural segment.

MEDIA VEHICLE

Out of Home (OOH) Media is an advertising medium which is used to reach consumers on the go.

Promotional SMS is a message delivered to consumers via mobile phones.

Ipsos ASI next*adlab

Is your creative approach living up to its potential?

Ipsos ASI's Next AdLab is a flexible early-stage pre-testing tool that combines qualitative insights with quantitative rigor. It was designed to help you optimize your creative, by quickly identifying and fully diagnosing what is and isn't working with your advertising.

Next AdLab is especially valuable in providing marketers with timely guidance in:

- Exploring different creative ideas
- Taking a new or bold creative direction
- Regaining effectiveness of ideas that seem to have stopped working

Test before you INVEST.

It is possible to save time and money by testing before investing in full up production.

Why Next AdLab Works

The success of this powerful creative development tool lies in its ability to be interactive, flexible, and fast.

Interactive. Fosters an immersive interaction among client, agency and researcher around consumer data and reactions. The quantitative phase helps direct the most relevant issues to explore in the qualitative phase, providing true "focus" and minimizing the potential for group think.

Flexible. Suitable for single and multimedia campaigns, for all types of media and for finished and unfinished ads.

Empowering. With the synergy of quantitative and qualitative learning you know what actions to take, immediately.



For further information please contact ►►

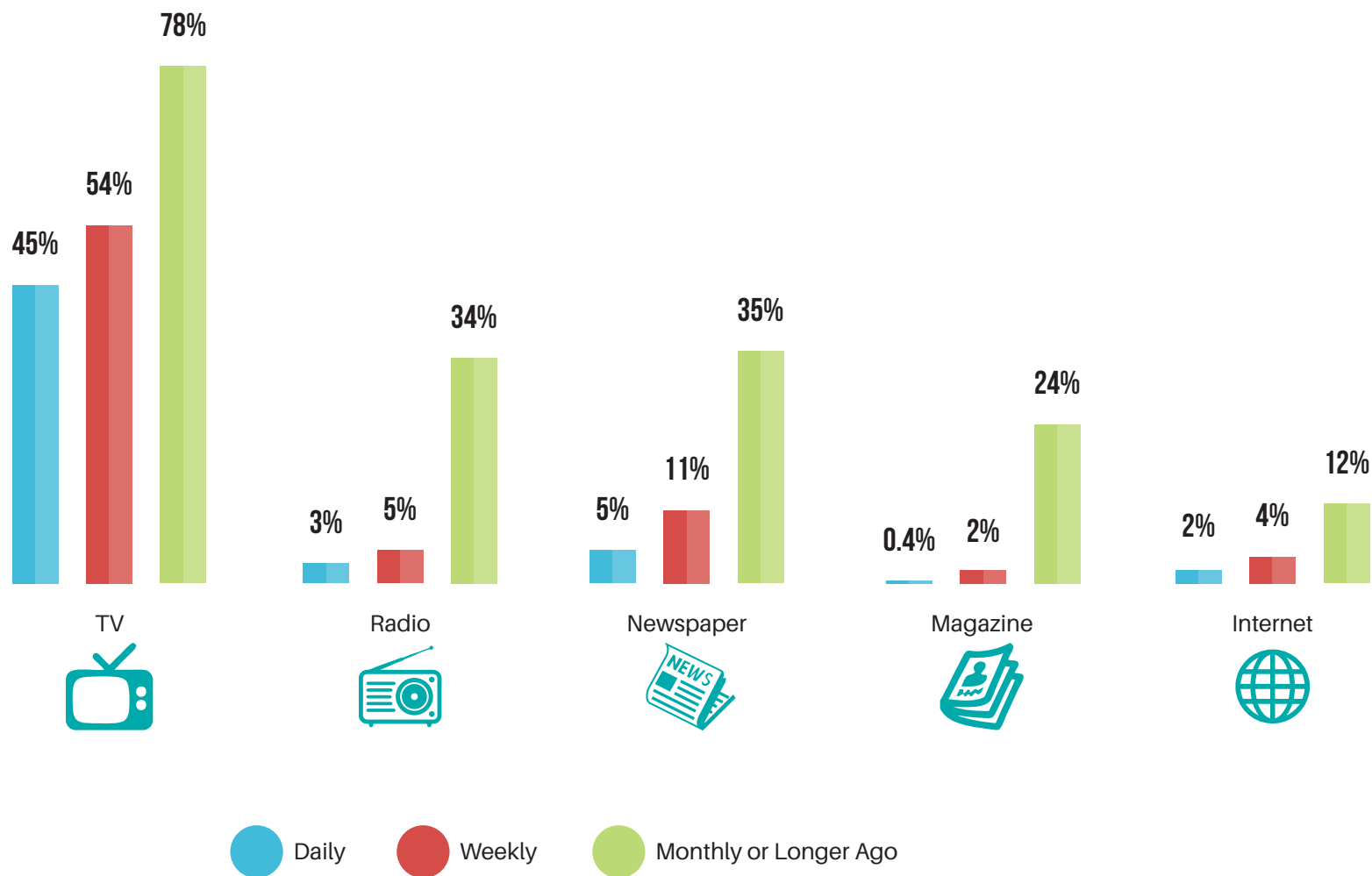
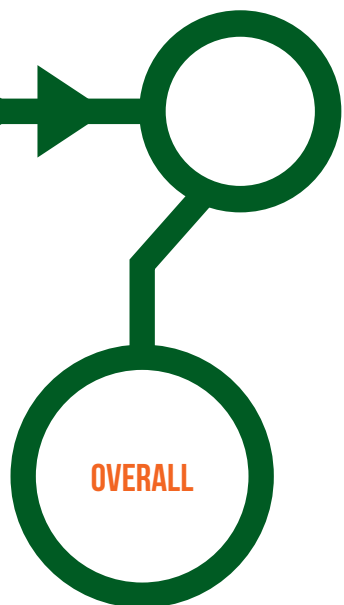
Bilal Mahmood
Country Business Lead
ASI

T: +92 345 8550282
E: Bilal.Mahmood@ipsos.com

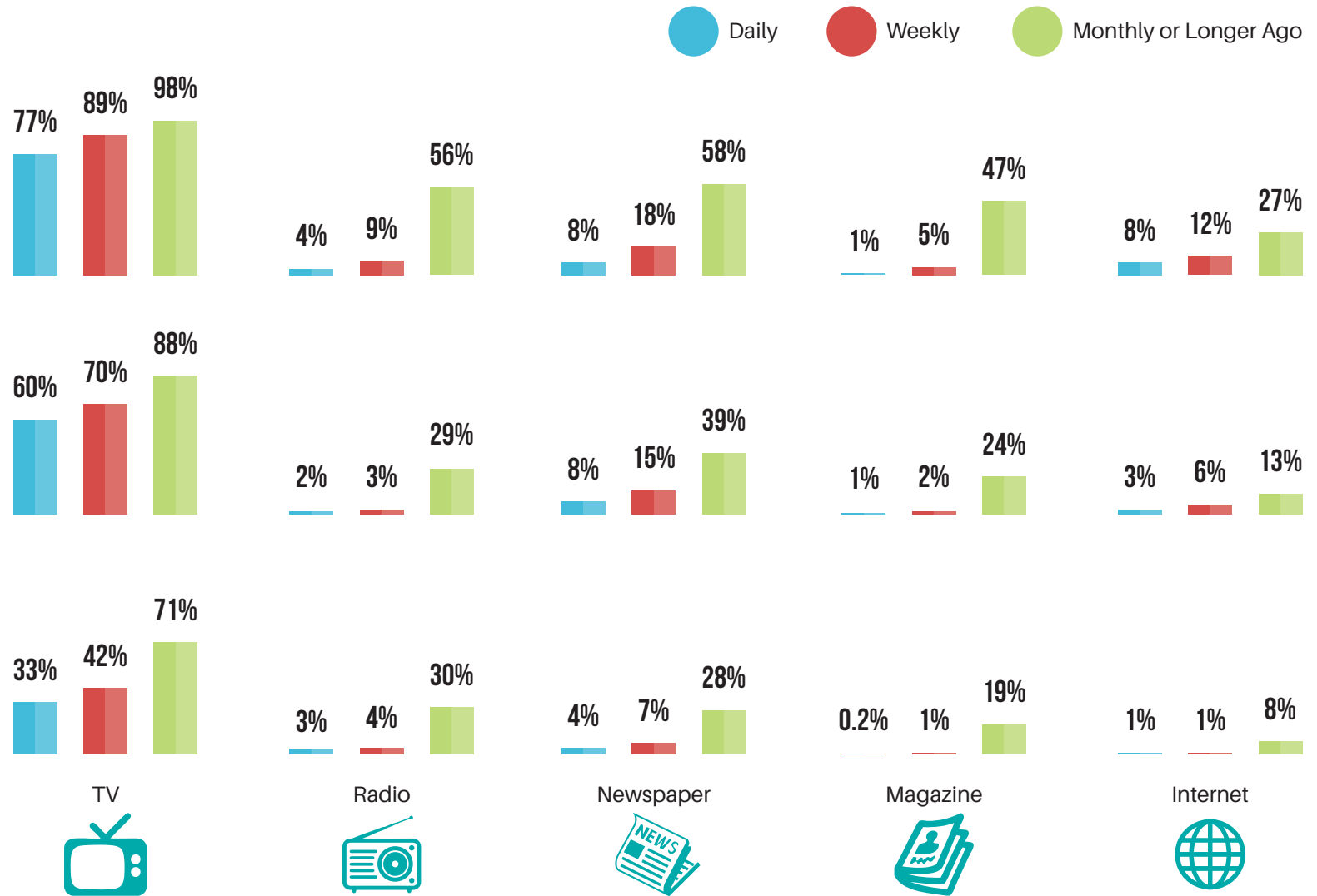
GAME CHANGERS

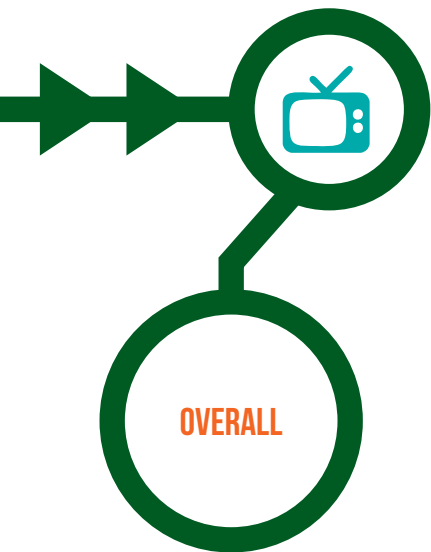


Multimedia Reach - I

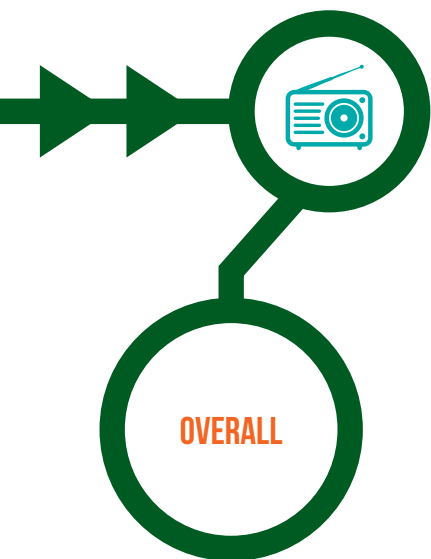


Multimedia Reach - II





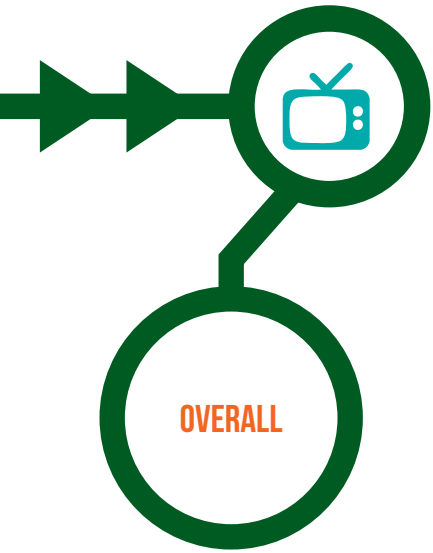
Reception Sources of TV



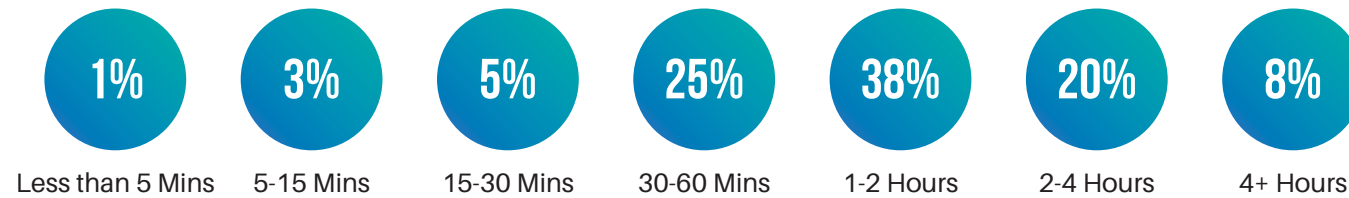
Reception Sources of Radio



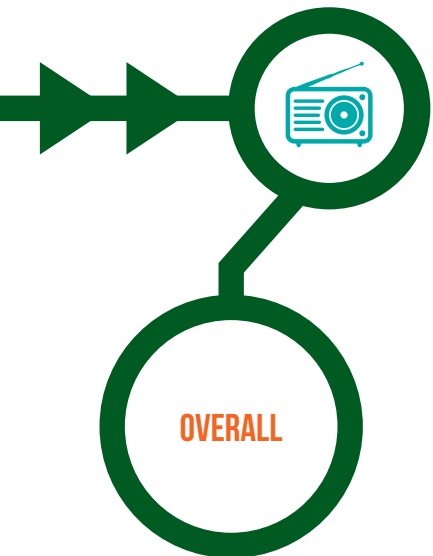
Base: Radio Listeners



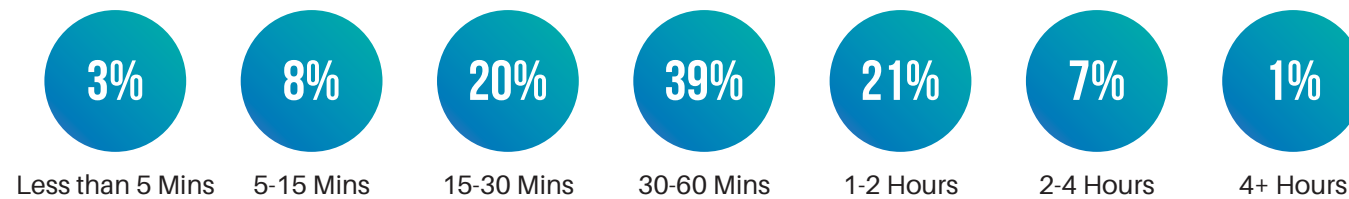
Average Time Watching TV



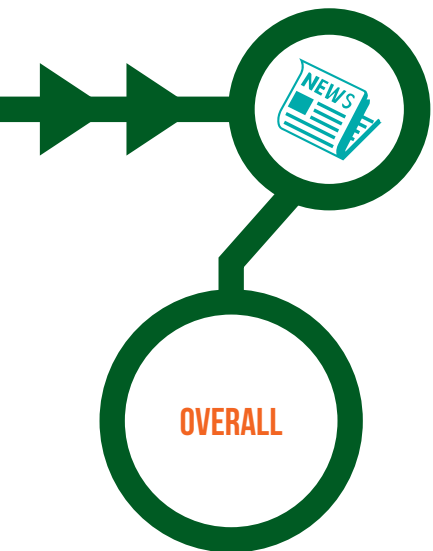
Base: TV Viewers



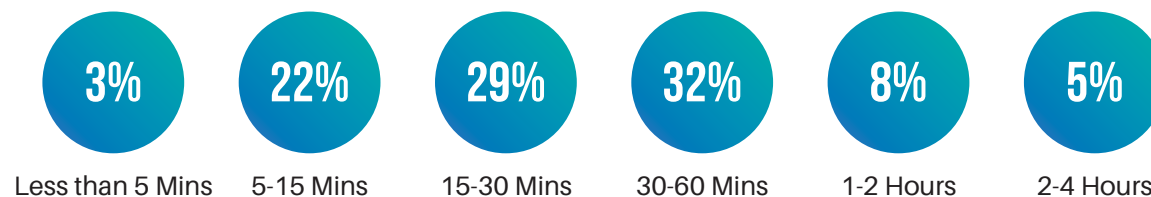
Average Time Listening Radio



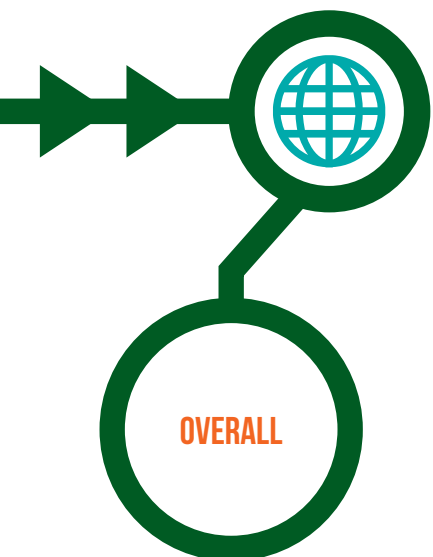
Base: Radio Listeners



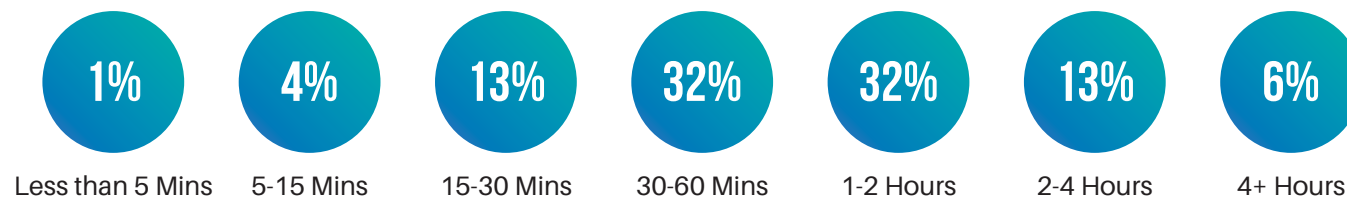
Average Time Reading Newspaper



Base: Newspaper Readers



Average Time Browsing Internet



Base: Internet Users

Shell Super DESIGNED FOR EXTRA KILOMETERS*

At Shell, our scientists are formulating smarter fuels designed to give better fuel economy for your vehicle.

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*Comparison between standard petrol. Actual benefits may vary according to vehicle, driving conditions and driving style. Not available on Shell Stations fed from Ghatti and Mehmoodkot Depots.





Most Watched TV Channels

OVERALL



Base: TV Viewers

Only those TV Channels' logos are placed which constitute 80% of the overall reach. They are in alphabetical order and from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)



Most Listened to Radio Channels

OVERALL



Base: Radio Listeners

Only those Radio Channels' logos are placed which constitute 80% of the overall reach. They are in alphabetical order and from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)



Most Read Newspapers

OVERALL

ENGLISH

--	--	--

Base: Newspaper Readers

Only those Titles' logos are placed which constitute 80% of the overall reach. They are in alphabetical order and from left to right.

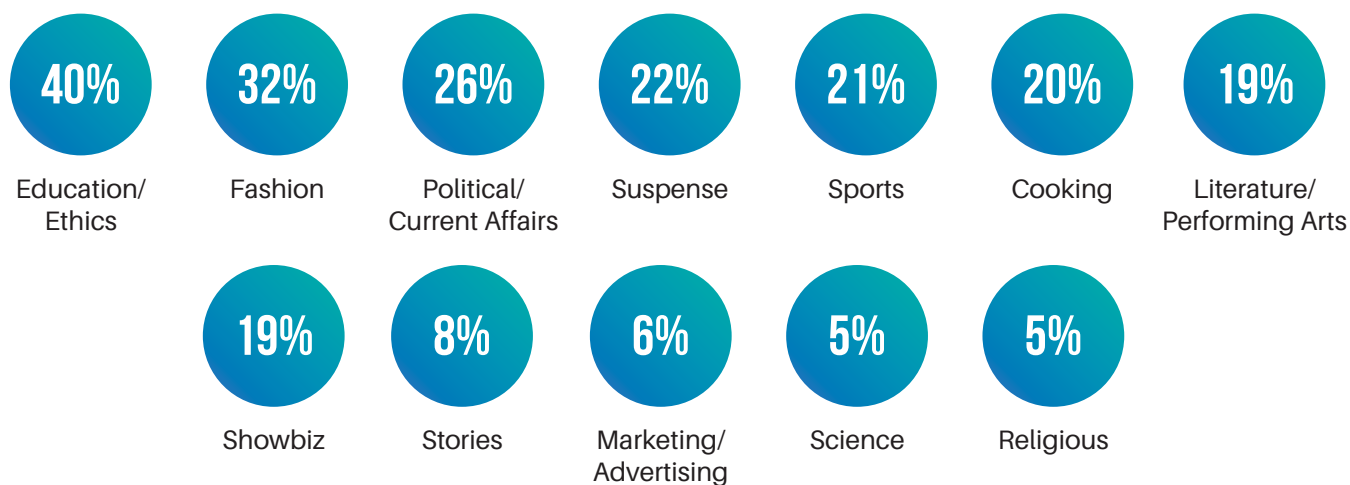
Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Most Read Magazines



Base: Magazine Readers

Favorite Magazine Genre



Base: Magazine Readers

Only those Titles' logos are placed which constitute 80% of the overall reach. They are in alphabetical order and from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

research

market, analysis, purchase, data, industry, people, mobile, users, question, technology, consumer, brand, finding, groups, learn, number, first, product, likely, way, food

insight

attributes, finding, knew, exciting, understanding, assumption, opportunity, results, interesting, perception, ability, way, curious, lidbits

strategy

analysis, business, strategic, way, ability, models, market, innovation, food, environment, marketing, process, number, first, product, new, plans, operation, objective, opportunity, likely, goal

activation

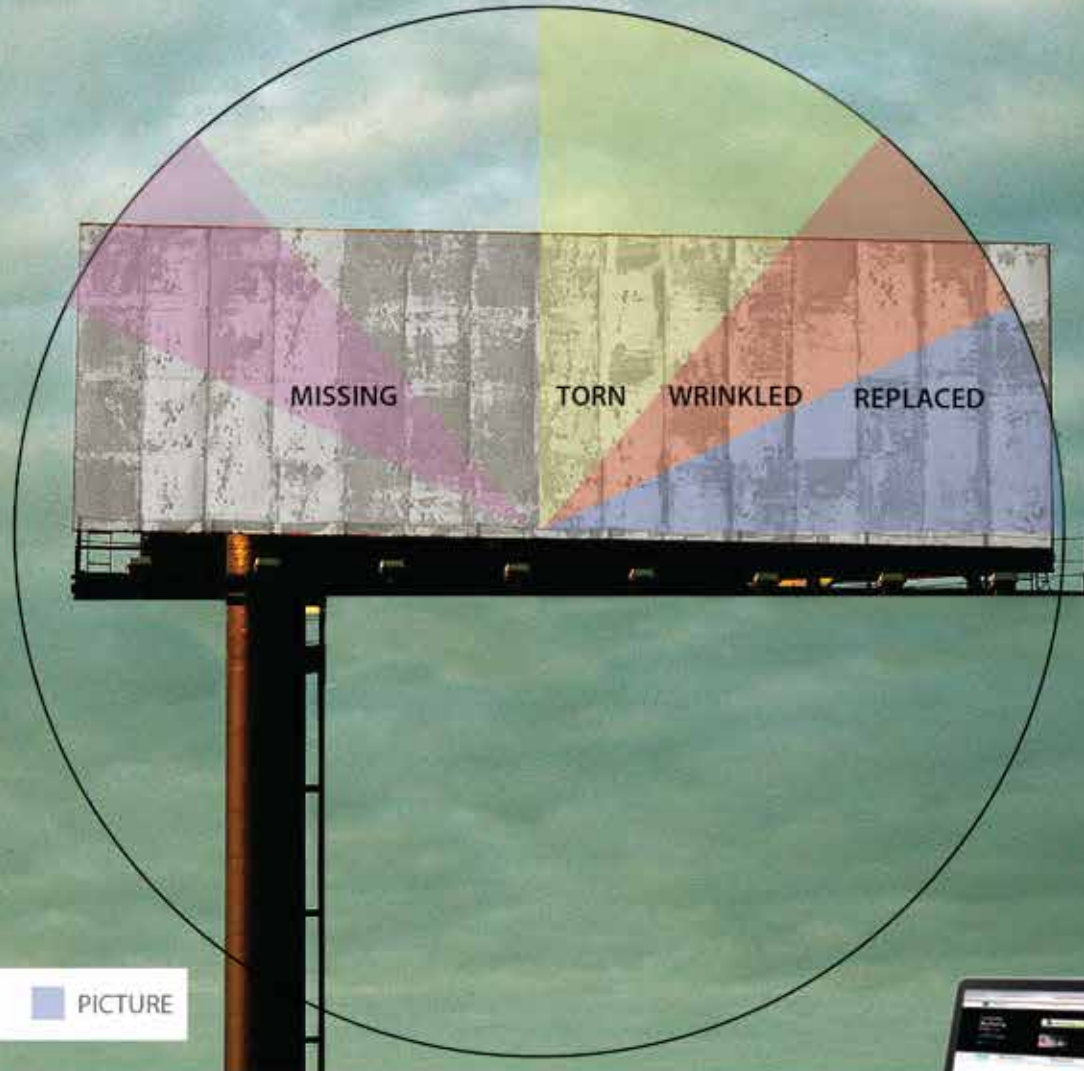
idea, wheels, rural, institutes, launch, trade, brand, branding, malls, digital, sales, kiosks, ceremonies, creative, expositions, events, colleges, online, movies, retail, innovative

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brandactivate.com.pk
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Introducing an online, measurable OOH Media Tracking, Monitoring and Audit service.

OOH Media is a cost effective way of promoting brands, products and services, but an unmonitored OOH campaign can cost you a lot more than it should – our data suggests, almost 17 percent more.

We ensure you don't pay more.

For more information please contact:

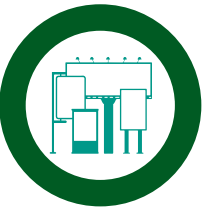
Maimuna Shafaat
Country Business Lead
MediaCT – Ipsos Pakistan

T: +92 345 8227313
E: Maimuna.Shafaat@ipsos.com

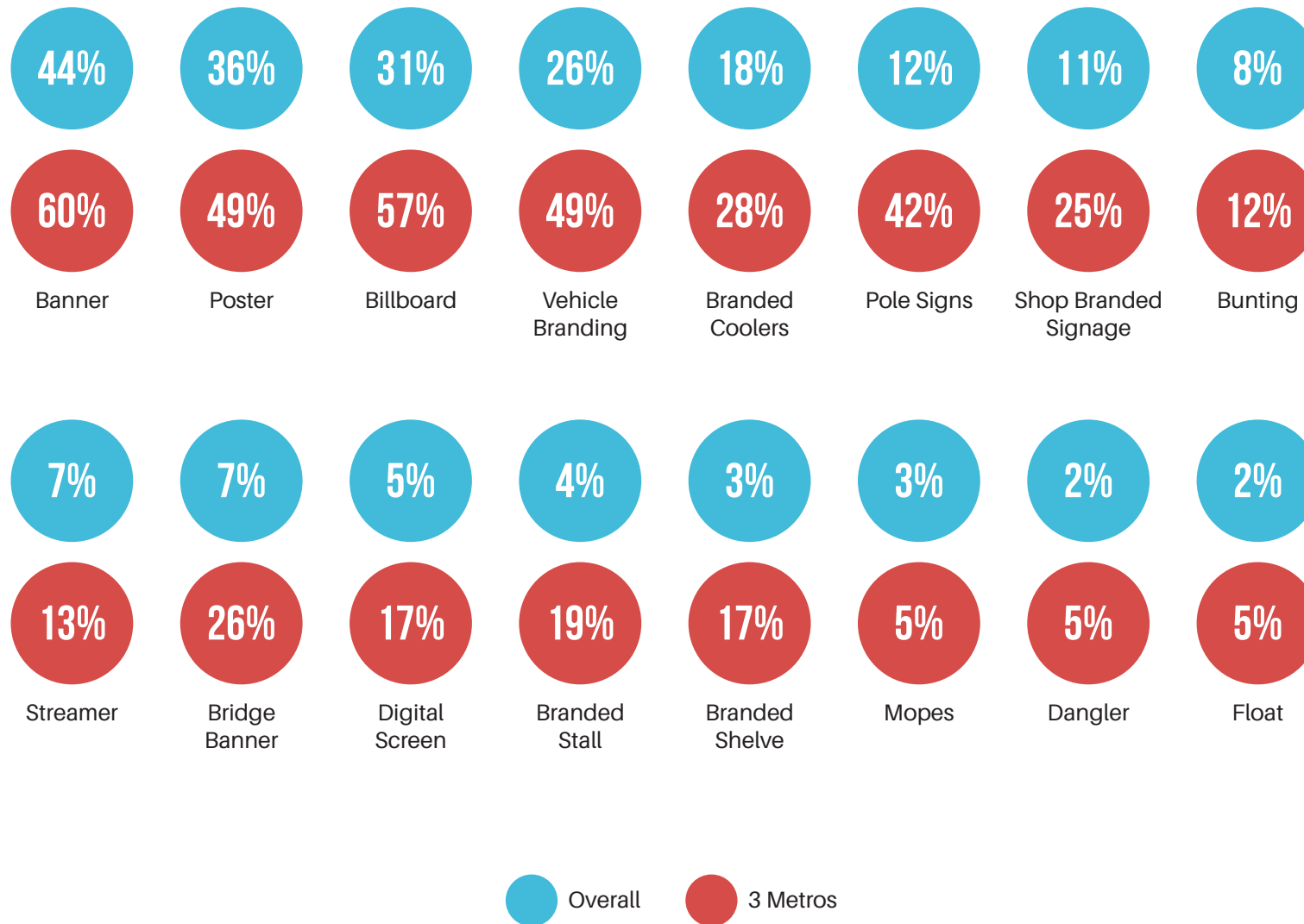


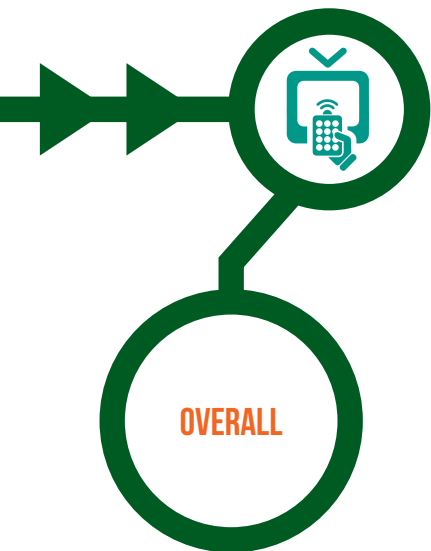
GAME CHANGERS



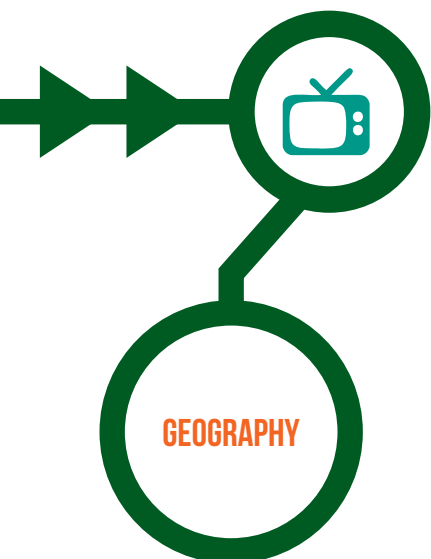
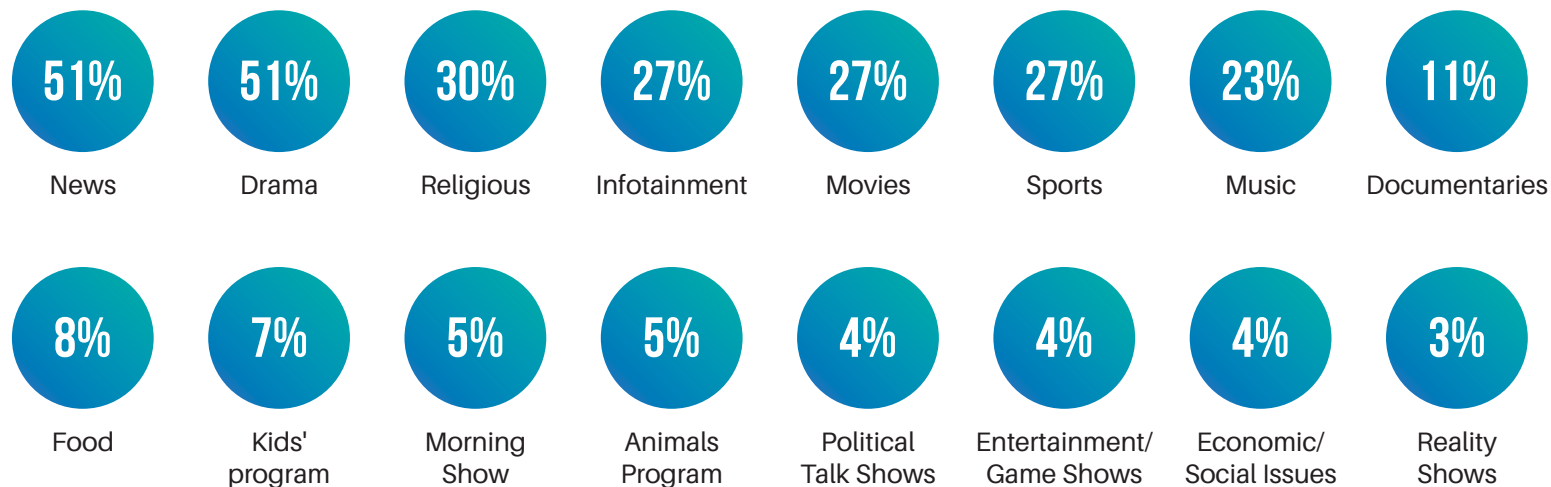


OOH Exposure by Type

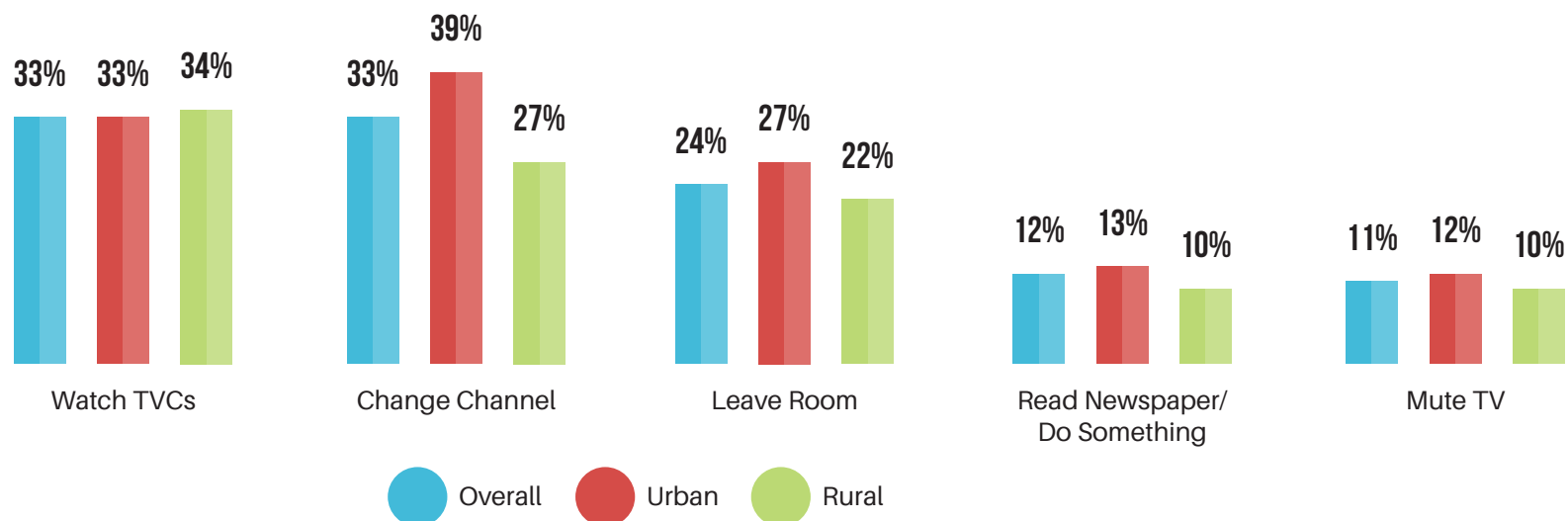


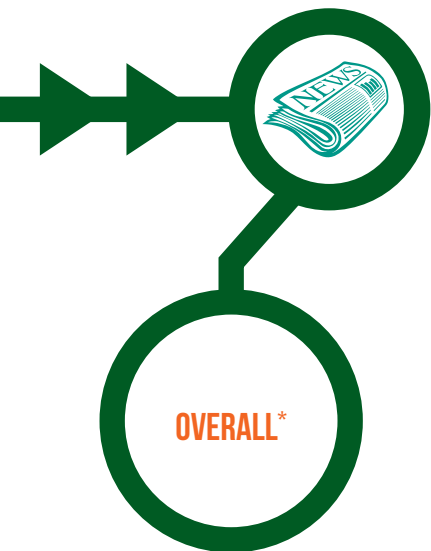


Favorite Programs on TV



Reaction to Commercial Break



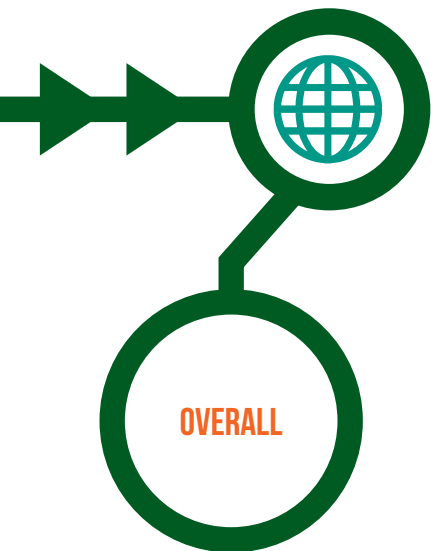


Favorite Sections in Newspapers

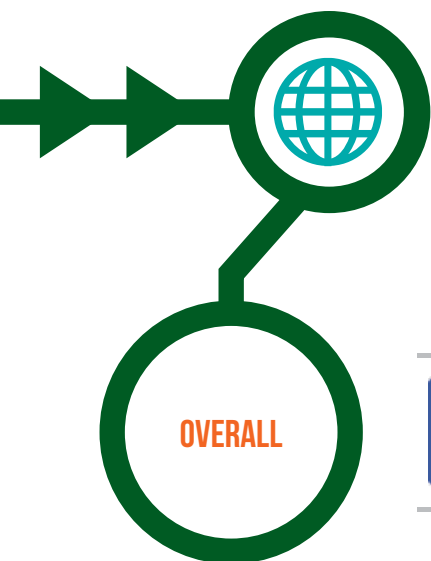
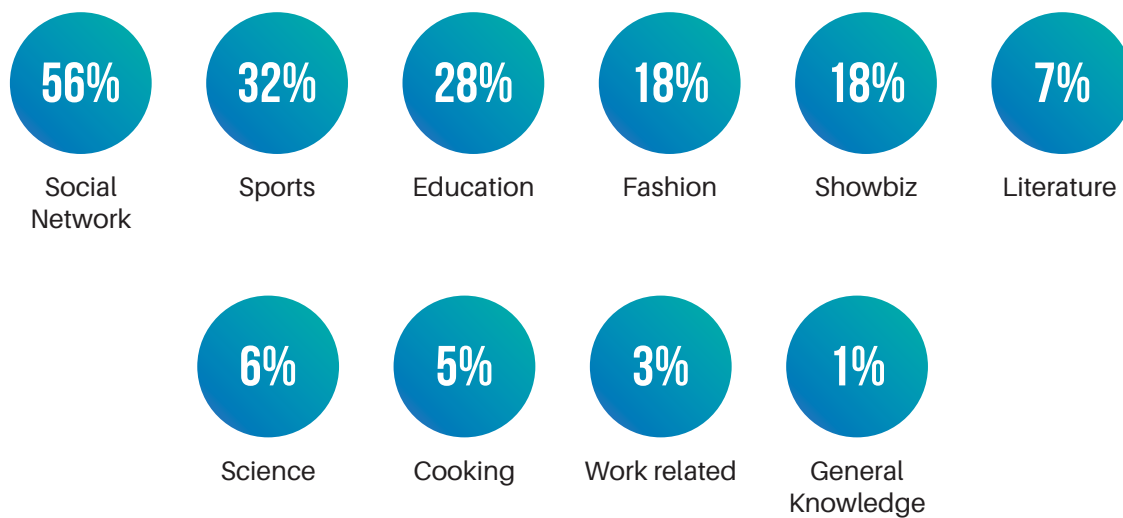


Base: Newspaper Readers

*Give 'lots of attention' responses only (on 3 point rating scale)



Favorite Website Types



Most Browsed Websites



Only those Websites' logos are placed which constitute 80% of the overall reach. They are in alphabetical order and from left to right.

Source: BRANDpuls - 2014 (Powered by CMI - Ipsos Pakistan)

Base: Internet Users



DESIRE
Glass Door

Ridiculously
good
looking



Change your life



LOW VOLTAGE START

The Low Voltage function regulates electric flow and will start the fridge safely even if the voltage is low.



SMART ECO CONTROL FUNCTION

It helps control electricity consumption and runs the refrigerator at the most economical mode with maximum efficiency.



BOTTLE RACK / SEPARATOR

Keep your bottles and cans sorted and organized with this new feature.



AROMA LOCK

A distinctive and exclusive Palladium-Carbon Based Deodorizer which slows food decay and removes unwanted odors.



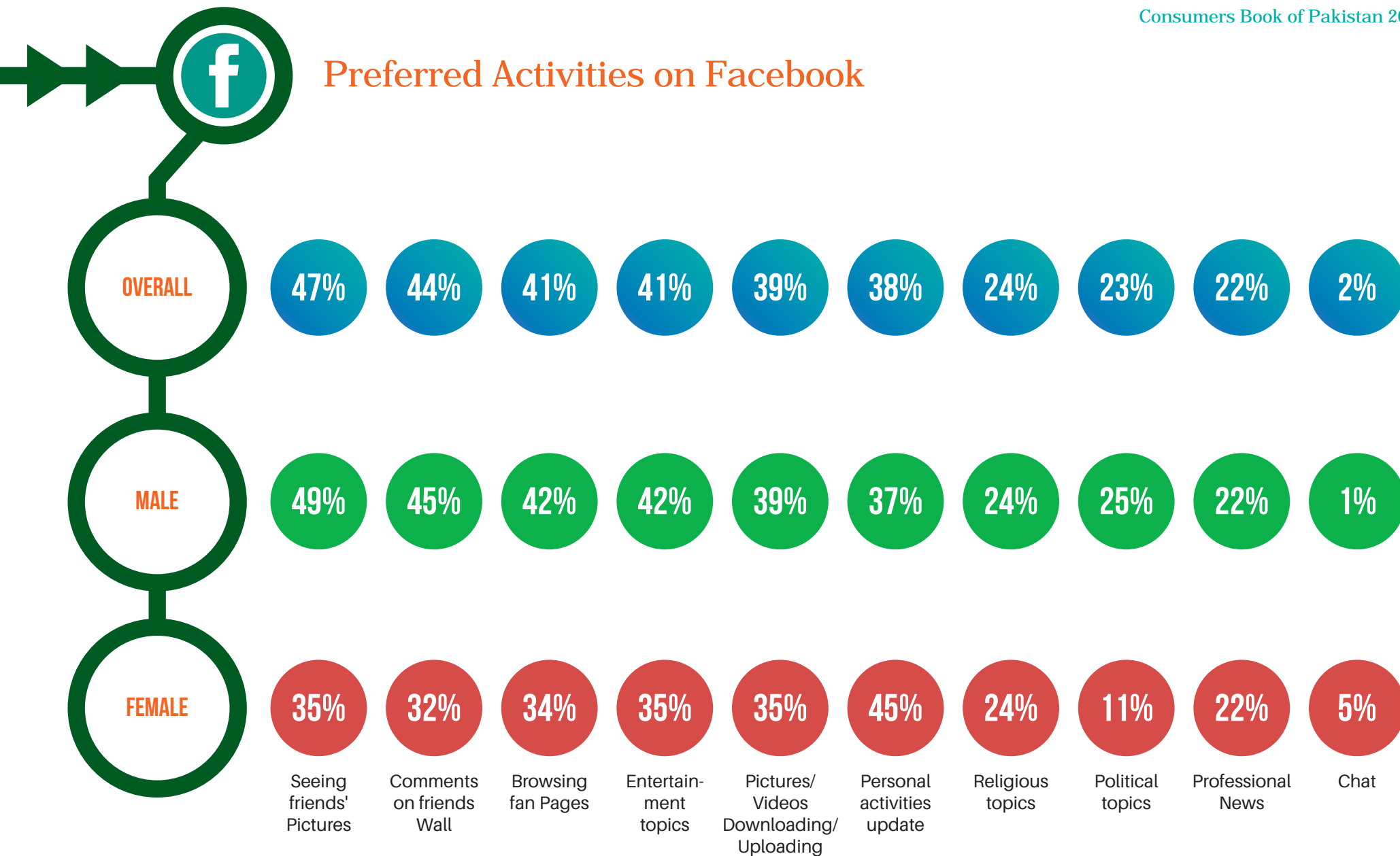
STRONGER HINGES

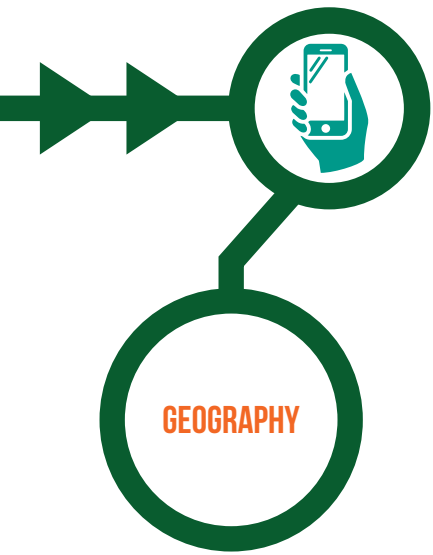
New top quality door hinges mounted smartly to avoid door misalignment.



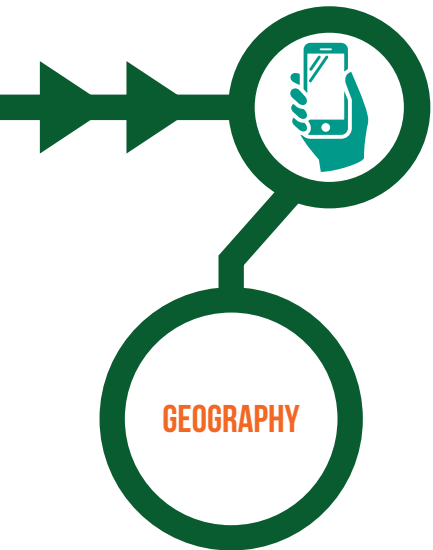
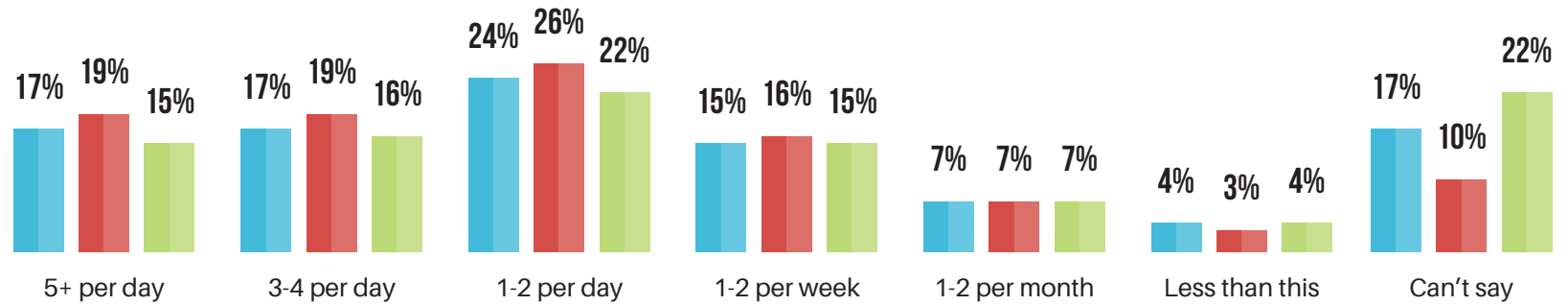
LED LIGHTS

Modern LED lights give a fresh feel in the refrigerator.

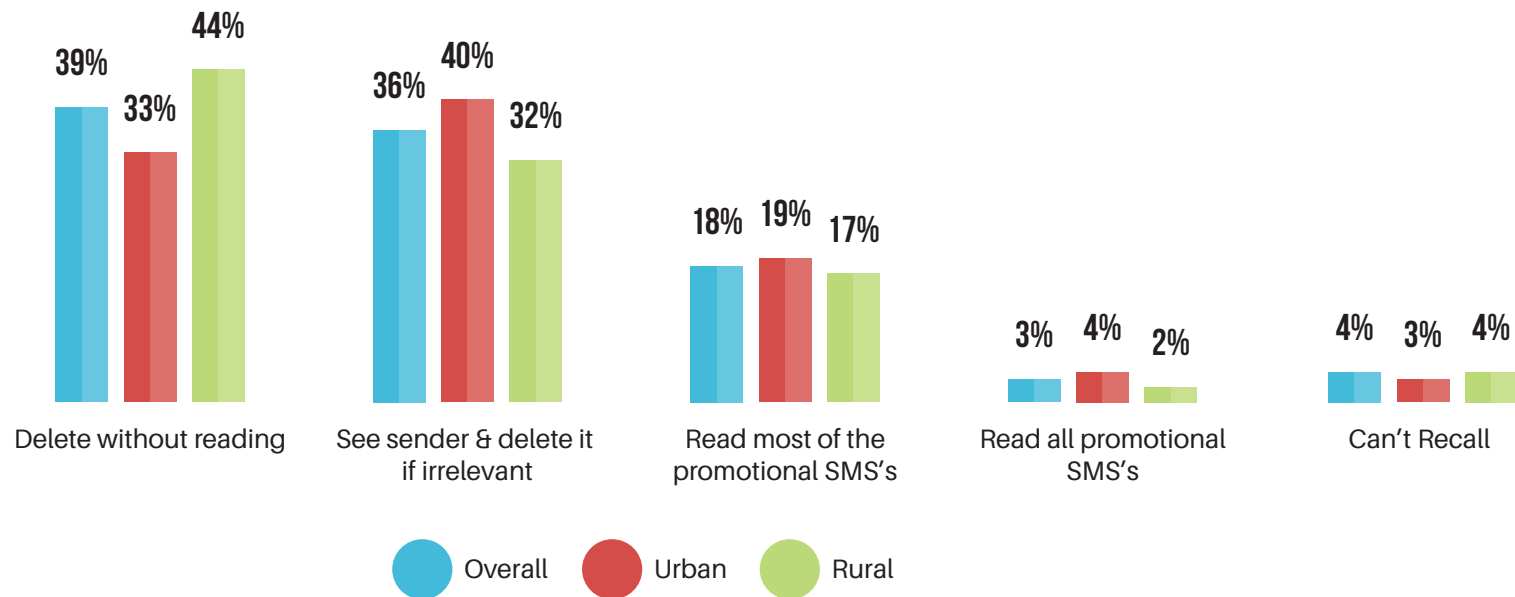




Frequency of Receiving Promotional SMS



Treatment with Promotional SMS



Base: Who receive promotional SMS



IPSOS OBSERVER

Ipsos Observer is the global practice within Ipsos group specialized in Survey Management, Data Collection, Data processing (Coding and Punching) and Data Delivery for clients, across all sectors, who need field and tab style research to support their businesses.

IPSOS OBSERVER CAN

Conduct Face to Face interviews

APPROACHES UTILIZE

- B2B/Office
- Public Intercepts e.g. Malls
Coffee Shops | Restaurants | Parks
- Educational Institutes
- Streets | Public Waiting Places
- Central Location Tests
- Home Usage Tests
- Snow Balling
- House to House

IPSOS OBSERVER CAN

Conduct interviews through following methodologies

- PAPI → Pen & Paper
- CAPI → Tablets | Laptop
- CATI → Laptop | Telephone
- Focus Group Discussion
- Indepth Interview
- Retail Census
- Online Survey
- Omni Bus

For further information please contact ►►

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Observer

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E: Aftab.Ahmed@Ipsos.com

GAME CHANGERS



A Distinctive Franchise Network



جہاں کو الٹی ایک روایت ہے۔

- A Unique Brand & Center of Excellence.
- Nationwide Franchise Footprints.
- Availability of complete and premium quality solutions under one roof.
- Superior Farmer Advisory service at **FMC shop** and at Farmer's doorstep.
- Modern Farmer awareness and educational programs to optimize production Technology.



ZOOMING
INTO RURAL
PAKISTAN





Housing Quality Indicators

Roof Material

	Overall	SEC A	SEC B	SEC C	SEC D	SEC E
Guarder/Brick	28%	39%	49%	41%	33%	2%
Mud and Wood	15%	0.2%	0.3%	5%	13%	33%
Iron guarded/wooden guarded/ brick and stones	14%	13%	18%	22%	19%	2%
Wood	13%	1%	1%	7%	12%	27%
Mud	12%	0%	1%	3%	7%	29%
Concrete/RCC	11%	42%	25%	16%	10%	0.3%
Readymade concrete	2%	4%	3%	4%	3%	0.5%
Grass/Leaves	2%	-	-	-	1%	6%
Mud and stones	1%	0.4%	1%	2%	2%	0.4%
Iron steels	0.5%	0.2%	1%	1%	1%	-



Sewerage System

Availability of Proper Sewerage System

	Overall	Sindh	Punjab	KPK	Baluchistan
Facility available	68%	46%	73%	77%	59%
Facility unavailable	19%	30%	14%	14%	37%
Can't Say	13%	24%	13%	8%	4%

Types of Sewerage

	Overall	Sindh	Punjab	KPK	Baluchistan
Open sewerage line	68%	80%	74%	41%	65%
Gutter line	32%	20%	26%	59%	35%

Preference Toilet & Field

	Overall	Sindh	Punjab	KPK	Baluchistan
Use toilet in household	96%	98%	97%	92%	97%
Go in fields	4%	2%	3%	8%	3%



Domestic Livestock

Availability of Livestock

Livestock available at home

Overall	Sindh	Punjab	KPK	Baluchistan
56%	64%	55%	50%	69%

Purpose of Domestic Livestock

Only for household needs

For market sale

For both household consumption and market sell

No meat/milk/eggs is collected

Can't Recall

Overall	Sindh	Punjab	KPK	Baluchistan
68%	71%	61%	87%	74%
4%	3%	4%	2%	8%
22%	21%	27%	8%	12%
3%	3%	4%	1%	-
3%	2%	4%	2%	6%



Traveling

Transportation used to travel to other village/town/city

	Overall
Cycle	3%
Motorcycle	21%
Rickshaw/Taxi	29%
Van/ Bus/Suzuki	83%
Car	2%
Train	2%

Travelling frequency to other village/town/city

	Overall
Daily	3%
Once or more in a week	14%
Once or more in a month	24%
Once or more in a year	40%
Less than once in a year	6%





Farming Practice - I

Cultivation Orientation

	Overall	Sindh	Punjab	KPK	Baluchistan
Involved in farming	15%	21%	15%	9%	10%
Someone else in my family is involved in farming	11%	13%	12%	6%	11%
Both (my family and I) are involved in farming	7%	7%	8%	2%	6%
Can't Say	68%	59%	65%	83%	73%

Farming - Own land vs. other's land

	Overall	SEC A	SEC B	SEC C	SEC D	SEC E
On my land	63%	85%	82%	70%	57%	50%
Someone else's land	37%	15%	18%	30%	43%	50%



Farming Practice - II

Land Ownership (in acre)

	Overall	Sindh	Punjab	KPK	Baluchistan
Less than 12.5 Acres	64%	72%	63%	62%	54%
From 12.5 Acres to 49 Acres	19%	17%	20%	8%	30%
50 Acres to 99 Acres	5%	8%	4%	1%	16%
More 99 acre	2%	-	1%	10%	-
Can't Say	11%	3%	13%	20%	-

Number of crops cultivated

	Overall	Sindh	Punjab	KPK	Baluchistan
One Crop	12%	7%	13%	19%	17%
Two Crops	61%	64%	61%	59%	56%
Three Crops	17%	18%	17%	17%	15%
More than three Crops	7%	9%	7%	1%	11%
Can't Say	2%	2%	2%	4%	-



Crop Seeds – Place of Purchase

	Overall	Sindh	Punjab	KPK	Baluchistan
Use my own crop's seed	43%	14%	55%	45%	29%
Get seeds from my friends/family	7%	2%	10%	7%	3%
Get seeds for village shops	8%	9%	8%	10%	3%
Buy seeds from nearby city market	36%	48%	35%	23%	18%
Get seeds from department of agriculture	3%	1%	4%	3%	2%
Can't Say	19%	27%	11%	32%	49%

Fertilizer – Preferred Companies

		 Fatima Group	 FAUJI FERTILIZER COMPANY LIMITED
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Crops Cultivated



87%

Wheat



34%

Cotton



25%

Rice



20%

Sugar Cane



16%

Corn



9%

Pulses



5%

Pearl Millet



4%

Onion



4%

Sorghum



4%

Mustard



3%

Potato



3%

Red Chili



2%

Tomato



2%

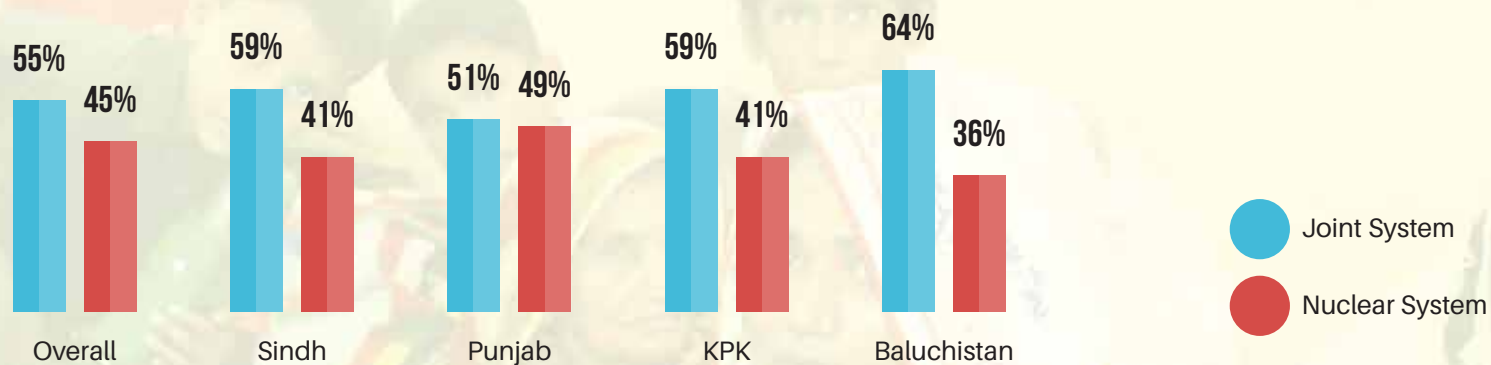
Peas



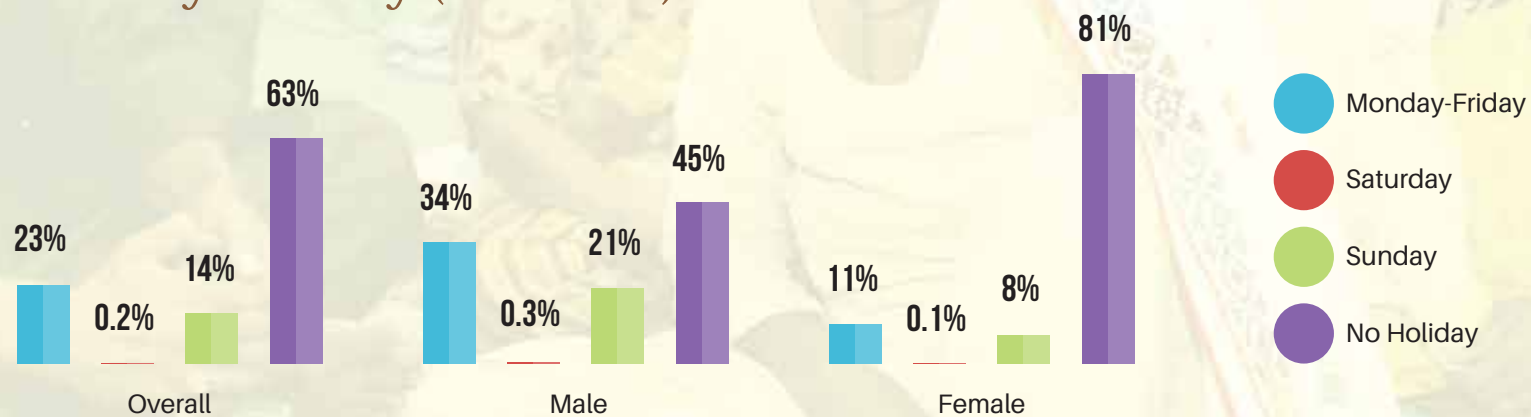
2%

Peanut

Family Structure

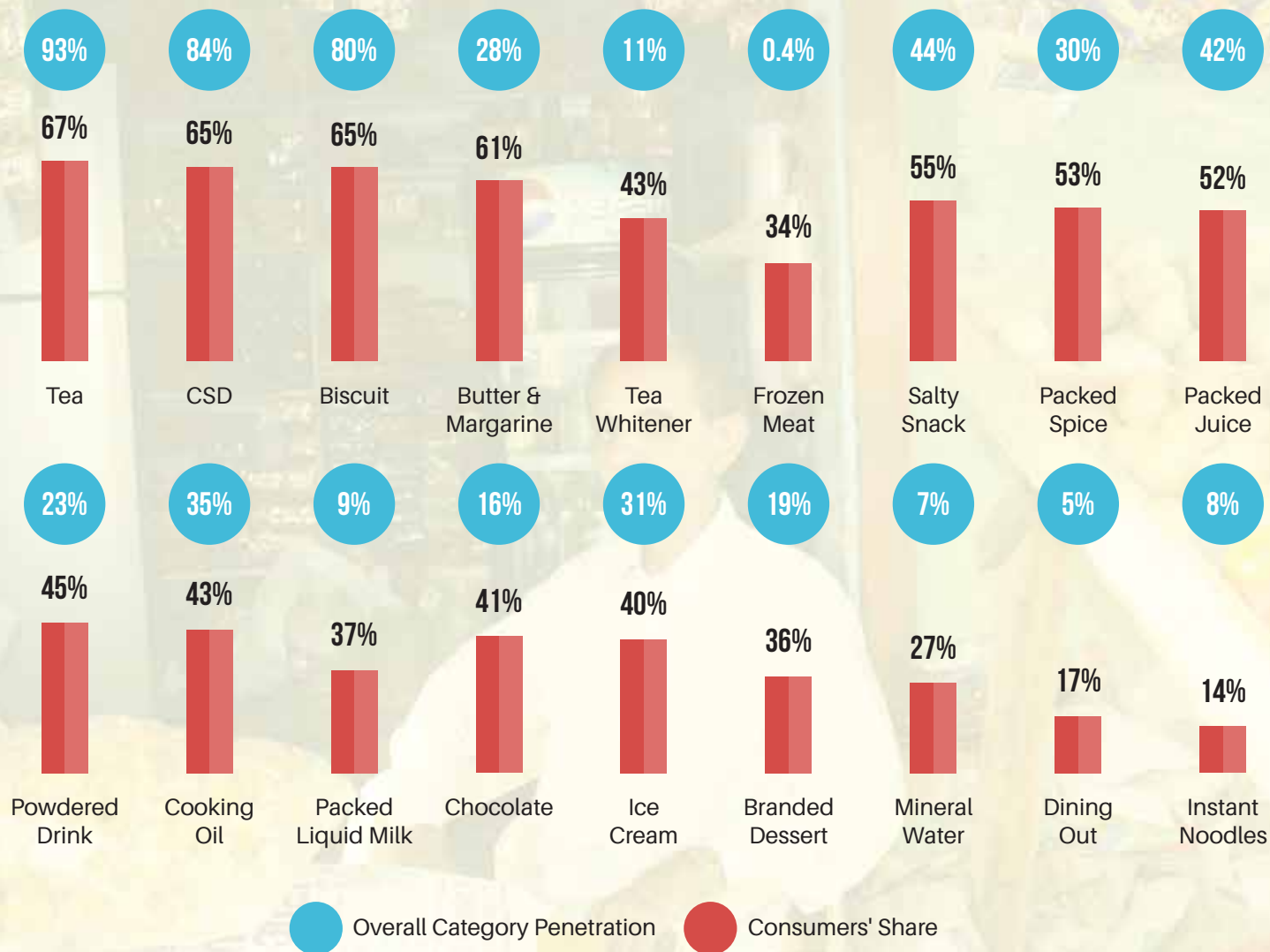


Weekly Holiday (Personal)



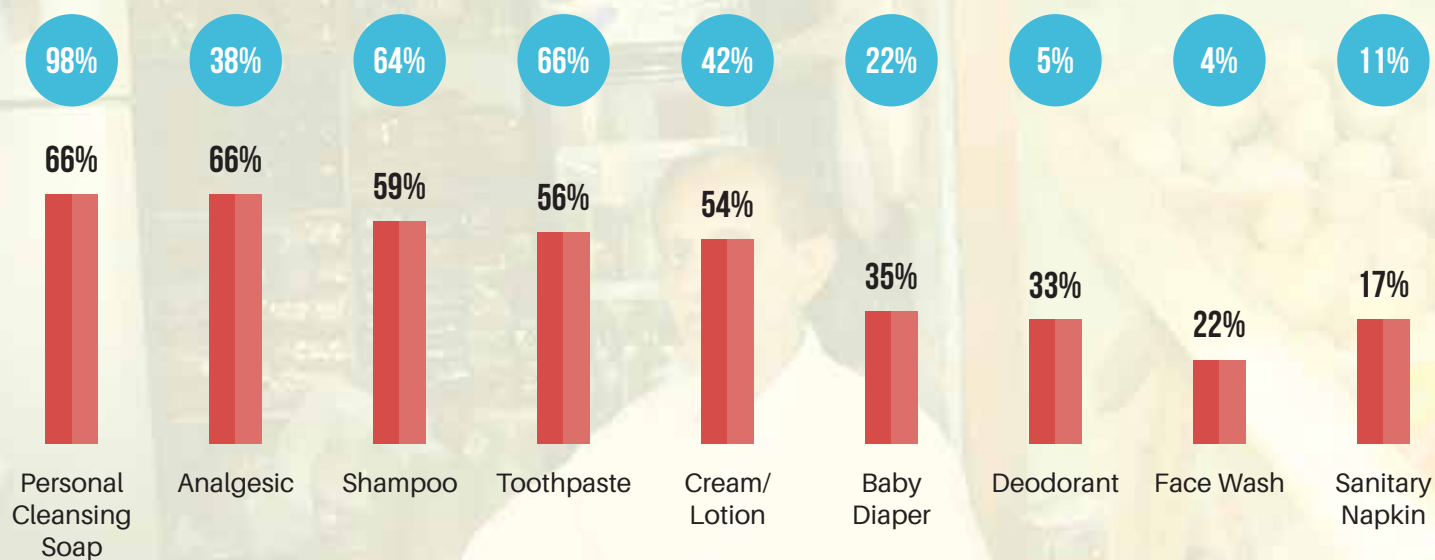


Ruralities Consumer Share in Food Categories





Ruralities Consumer Share in Personal Care Categories



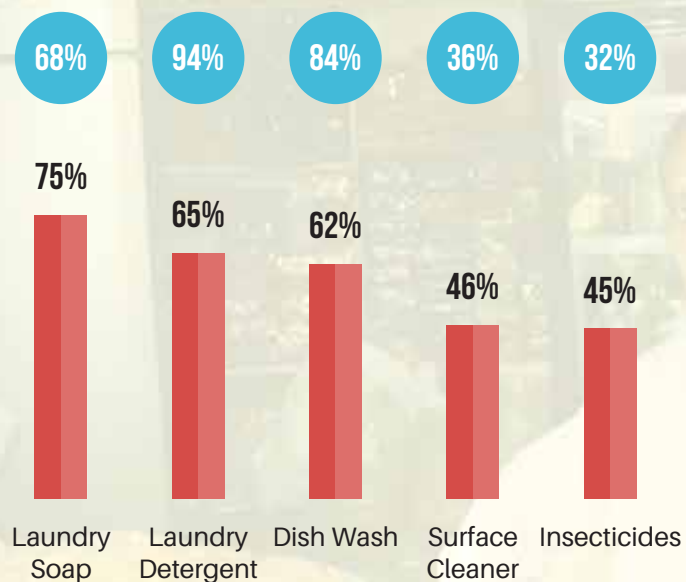
Overall Category Penetration



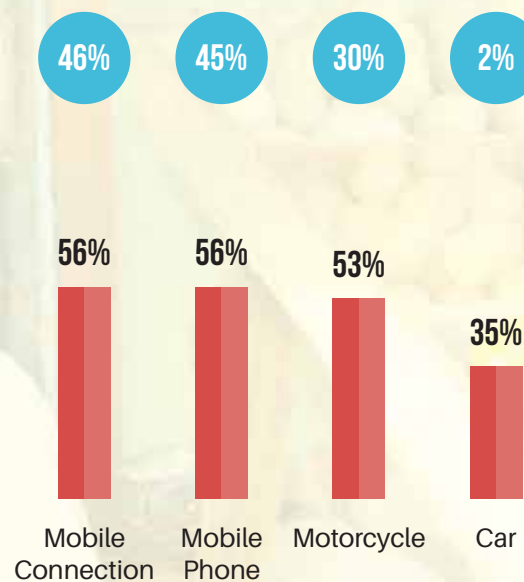
Consumers' Share



Ruralities Consumer Share in Home Care Categories



Ruralities Consumer Share within Durable/Service



Overall Category Penetration



Consumers' Share



**RECEPTION
SOURCE OF TV**

25%

Terrestrial
Antenna

14%

Cable
Connection

9%

Dish
Antenna

53%

Don't have
TV at home

**RECEPTION
SOURCE OF
RADIO***

55%

Mobile
Set

33%

Radio
Set

9%

Pocket
Radio

3%

Other
Sources

**AVERAGE
TIME READING
NEWSPAPER****

3%

Less than
5 Mins

19%

5-15 Mins

29%

15-30 Mins

32%

30-60 Mins

8%

1-2Hours

9%

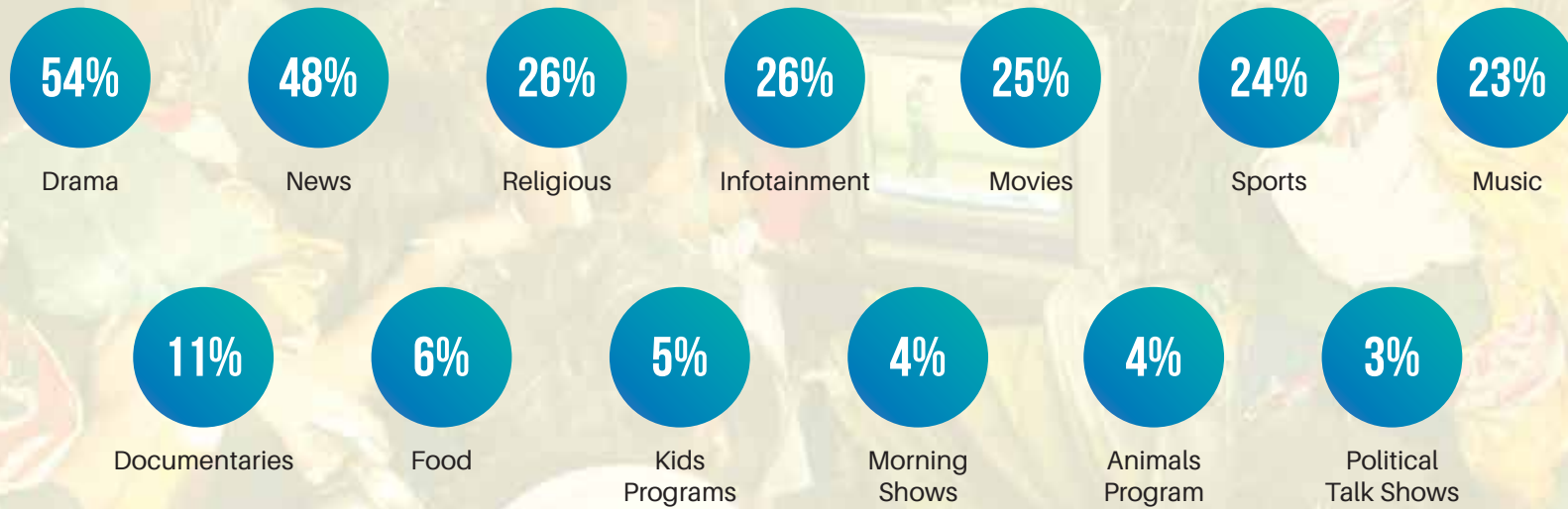
2-4 Hours

*Base: Radio Listeners

**Base: Newspaper Readers



Favorite TV Program*



Base: TV Viewers

* 'Like a lot' responses only (on 3 point rating scale)



Chai **Café** mein
magic hai!





Havoline[®]

PROTECTS YOUR ENGINE'S PERFORMANCE



Havoline with Deposit Shield[®] Technology responds to the extreme demands of your engine by delivering dynamic protection and performance where it is needed most. It exceeds even the toughest industry specifications.



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According to the CMi Study released by Ipsos MediaCT in August 2014, **Daily Jang** is the undisputed leader in Urban Pakistan with a readership of **53%** and yes, this is **twice that of the No.2** newspaper.

What's more?

In the 3 metros, **73%** of the newspaper readers start their day with **Jang**, beating the No.2 newspaper by **192%**. Moreover, **90%** of the newspaper readers across the 3 metros read a Jang Group newspaper to shape their opinions. This is what makes Jang the first choice for your media plans.

