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PAN ARAB RESEARCH CENTER

Pan Arab Research Center (PARC), your partner in market research, perpetually strives to explore situations and define marketing opportunities with its unique experience, distinctive know-how and analysis tools. Over the years we have been unfaltering contributors in all areas of marketing, providing timely and accurate information about specific/ general marketing problems, monitoring past trends along with the present situation and forecasting the probable future to aid marketers make better informed decisions in the Arabian bazaar

The contents of this book provide you with:

- An outcome of our research on advertising trends for Y2006 and highlights of Y2007.
- Our portfolio throwing light on how we can be your research partner – a glimpse of our services.

Our Portfolio for the Y2007 includes Adhoc and Syndicated studies involving Usage and Attitudes research, Psychodynamic Qualitative research, Advertising media research & Media monitoring services, etc.

In order to offer a broad market perspective view and facilitate the media planning function for the current year and for near future, I am pleased to present a comprehensive guide – **The Harvest of Y2006** which has been put together to provide an insight into the key trends in the advertising marketplace at a glance.

Our analysis covers the GCC, Levant and the Pan Arab Media markets providing an exhaustive databank on the Advertising Spend in year 2006, Seasonality of Spend, Overall Media-split, Advertising Spend by Chapters and the Top Spenders for the Y2006.

The harvest for Y2006 shows an overall healthy gradation; nonetheless whereas some markets have exhibited remarkable upward trends, few have shown checked progressions.

PARC specializes in continuous, comprehensive media and market research. Our goal has always been to provide reliable, accurate data for an objective and transparent view of the market in order to assess, refine and more effectively implement the highest standards of advertising and marketing.

We look forward to being of service to our Clients and assure you of our commitment to provide you with quality, innovation, precision and promptness.

SAMI RAFFOUL
General Manager

Brief Outline

Pan Arab Research Center (PARC), founded in 1976, is an established and qualified research and information systems house. With its regional center in Dubai, PARC offers extensive coverage through its ten offices in the Middle East/GCC and Levant countries.

PARC has affiliations with **TGI International, Europanel** and its senior staff are members of ICC/ESOMAR. PARC has developed highly sophisticated methods in handling a vast range of consumer, opinion polls and media research.

PARC has over 450 full time researchers, analysts, programmers, translators, and marketing personnel with commendable experience in the field of research. In addition, there is a large pool of resources for field operations.

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- Member of TGI Group (since 2001)

Professional Affiliations of Staff

Managers and Directors are members of the following professional associations:

- ESOMAR: European Society for Opinions & Market Research
- International Advertising Association (IAA)

Pan Arab Research Center

HARVEST Y2006

Y2006: Disparity of Emerging and Maturing Markets

The total Y2006 advertising spend of the region shows a healthy soar of 21% from Y2005's $ 5.4 billion to 6.5 billion.

The advertising growth rank palette nevertheless seemed quite upturned, where the spear-headers of Y2005 having pared (down) in contrast to the emergence of a few underdogs.

On the brighter side, Qatar outstripped its neighbors registering an astounding 101% spend accretion; hosting the Asian Games last autumn the island nation deservedly beaconing as the fastest growing economy in the world. Y2005's runner in fronts and traditional market's potentates UAE & KSA although retaining their top-slots, slackened in terms of growth, with a watered upturn of 22% & 7% in Y2006 as compared to 37% and 30% upshot of preceding year.

Egypt also registered a positive spur in Y2006 second highest in the league of 40% as compared to a much lower performance of 21% in the preceding year; followed by Oman, logging 32% growth as its growth trickled down by 14% vis-à-vis Y2005.

Lebanon in 06 tragically again became the centre of international attention for all the wrong reasons, forbearing aggression from its neighbor this time around, just after it had gained some threshold in the precarious political climate post Hariri's assassination. Commendably it managed to preserve its macroeconomic stability to a large extent and avoid a severe recession in such a difficult environment, registering a controlled slump of 14%.

Bahrain fared comparatively better with a 3% mount in contrast to Y2005 where it recorded a recession of -11%. Jordan suffered quite a setback seeing its growth dwindling from 42% in 20005 to mere 4% in Y2006.

The growth slowdown to some extent for both the key markets UAE and KSA is a cause of concern; particularly so for KSA. Where outwardly factors such as the sad demise of Dubai's late ruler followed by cancellation of Dubai Shopping Festival can be accrued to the ad spend tumble of UAE last year; there are multitudes of apparent factors being pointed at for KSA's checked progression. With some blaming the ad-spend slash by Insurance and Real Estate sectors; majority see the stock-crash earlier in February Y2006, which wiped off half of the value of the Arab world's largest bourse in 60 trading days as the main cause.

The stock market turnover estimates fell to SR16.33 billion from SR19.52[1] billion in the same time period. Dubai followed the fluctuation of Saudi bourse and suffered likewise. Fluctuations of this magnitude whether positive or negative are not conducive to a settled stock market and indicate acute investor uncertainty affecting the market corrosively. Trade pundits and industry leaders point-blame this to the "embryonic – stage" of regional stock market, which they believe is still learning and as a result witnesses sudden exuberant levels of stocks followed by steep tumble. Business gurus claim that most of the local players at the trading-floor are not institutional investors contrary to their foreign counterparts where 95% investors are the same who with sharp bourse acumen analyze stocks and undertake big investments. To the contrary the scenario is totally differing in the regional bourse where most of the traders are retailers who enter and exit the stock market haphazardly, resulting in a crisis-scenario as witnessed last year.

Inasmuch prognostications of growth slag at macroeconomic front for the last year, by international think tanks, for the main GCC markets should also be taken in consideration for ad-spend slumps in Y2006.

Overall if we are to grasp a chronological progression for Y2006's growth; the consolidated *Arab Advertising Market* has doubled its growth: taking 2004 as base year it increased by 17% in Y2005, followed by 42% in Y2006 over Y2004.

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[1] "Saudi Arabia: Stock Plunges 1,095 points" (www.zawya.com)

Market Rankings

Pan Arab Regional media market by virtue of its sheer scale outweighed other individual markets in the passing year with US$ 2.4bn a 24% hike from Y2005. In Y2006 UAE still maintained its vanguard position overshadowing KSA with US1.06bn. KSA got the runner-up rank with US$978mn succeeded by Egypt which retained its third ranking by logging an extraordinary growth of 40% with US$754mn. The remaining markets maintained their Y2005' tiers, nevertheless where some markets like Qatar US$237mn, Oman US$ 139mn catapulted, others like Bahrain US$107mn registered paltered growth.

Fig. No. 1 **Markets Ranking & Media Contribution (US $ Millions)**

						%Var'n	Media Contribution (US $ Million)											
Rank & Market Name			Y 2004	Y 2005	Y 2006	Y06/05	TV	Newspapers		Magazines		Radio		Outdoor		Cinema		
1	Pan Arab Media	PAN	1,779	1,872	2,316	24	2.054		28		209	25			0		0	
2	United Arab Emirates	UAE	634	869	1,063	22	119		701		175	11			47		9	
3	Kingdom Of Saudi Arabia	KSA	699	911	978	7	59		751		62	23			83		0	
4	Egypt	EGY	445	540	754	40	289		365		48	47			4		0	
5	Kuwait	KWT	382	438	494	13	58		355		50	4			27		0	
6	Qatar	QTR	93	118	237	101	7		219		9	0			4		0	
7	Lebanon	LEB	276	270	231	-14	102		35		38	17			39		0	
8	Oman	OMN	72	105	139	32	15		117		6	0			0		1	
9	Jordan	JOR	76	108	112	4	14		84		8	6			1		0	
10	Bahrain	BAH	116	103	107	3	20		67		15	2			0		2	
11	Other Markets**	OTH	47	70	126	80	79		31		12	6			0		0	
	Total AGCC & Pan Arab	**GCC**	**3,802**	**4,451**	**5,425**	22	**2,390**		**2,258**		**534**	**72**			**162**		**12**	
	Total Levant Markets	**LEV**	**818**	**953**	**1,132**	19	**426**		**495**		**97**	**70**			**44**		**0**	
	Total All Markets	**M$**	**4,619**	**5,404**	**6,557**	**21**	**2,816**		**2,753**		**631**	**141**			**206**		**12**	
						i%		**i%**		**i%**		**i%**		**i%**		**i%**		**i%**
				Y2004	4,619	100	2,190	100	1,702	100	466	100	88	100	162	100	12	100
Markets Growth Index (Base Y2004)				**Y2005**	5,404	117	2,275	104	2,275	134	562	121	102	116	174	108	13	108
				Y2006	6,557	142	2,816	129	2,753	162	631	135	141	160	206	127	12	98

PESTL Analysis

PESTL* analysis of the region can help interpret to a large extent growth's crests & troughs in Y2006. On the surface, Political and Legal factors can well be accounted for a jaded growth (than expected) from UAE, given the sad demise of its late ruler HH Sheikh Maktoum bin Rashid Al Maktoum on the first day of DSF, ensuing suspension and subsequent cancellation of the region's commercial carnival. Disruption of regular Radio and TV programming in the same period as a result, triggered several companies' media budgets into spin. Nonetheless, progressive economic and social policies of Emirates have in continuation orchestrated its burgeoning growth, offering tax and red-tape free business networking, attracting regional and international investors thereby.

On further in-depth analysis, foresights of economical growth cessation in Y2006 for KSA and UAE, by international economic centers should be taken in consideration for comprehending ad-spend cut backs.

*PESTL: Political – Economic – Social – Technological –Legal Analysis

Desert Lynx

Political turmoil given the aggression over Lebanon again disrupted advertising networking last year and caused a slump in the market; the solitary relief being that the conflict happened in summer, traditionally a sluggish period of advertising. However the country being a major advertising' pivot of the region lodging many production houses, agencies and more importantly supplying creative workforce, any instability in Beirut makes the regional industry suffer inevitably.

Business acumen of political headship in the UAE helped continuance of economic furtherance, albeit the rampant growth pace slowing down nevertheless. Dubai today with its iconic trans-regional hub image is emerging as the business address opt for many broadcast & print operations, it also in addition homes more than 150 advertising firms today. The media growth euphoria in the Emirate is spilling over to its neighbors as well with twenty-eight satellite TV channels planned to be launched in Fujairah-Media free zone this year.

As a basic rule of thumb of pecuniary arithmetic in well-established markets, ad expenditure rises more rapidly than increases in GDP, contrary to this a one percent decline in GDP produces a 3 to 5% variation in advertising expenditure, which may well be seen in ad-spend growth' slumps of KSA and to some extent of UAE in the year bygone.

Although unswerving figures of GDP projections are still unobtainable; the available contradictory figures are hindered by the use of inflammatory estimates which vary widely but according to UN's (United Nations) ESCWA[2] forecasts KSA's real GDP growth rate of 6.8% for Y2005 was to lower down to 6% in Y2006[3]. Given this projection the repercussions manifest in the kingdom's ad-spend growth shrink for the past year. Likewise ESCWA projected a substantial slump of 2% from 8% GDP growth in Y2005 to 6% in Y2006 for UAE[4] earlier this year nevertheless a much healthier projection of 9.1 % growth was published in the last quarter of Y2006 still the average growth of UAE ad-spend however suffered a setback with 22% growth in Y2006 against the spectacular 43% in 2000.

ESCWA projected substantial growth accelerations for Qatar and Oman which can be seen in remarkable swell in the ad-spend of both the countries. Oman's GDP growth in Y2006 was forecasted to grow at 6.5% as compared to an estimate of 4.2% in Y2005; whereby Qatar's real GDP was forecasted expected to expand to 7% in Y2006 owing to the high rate of public investment in the country. Likewise Egyptian economy was projected to bolster in Y2006 by strong domestic demand thrusting the GDP growth by 7.1% which not surprisingly reflects on a healthy adspend growth of 40%. The reversed (-14%) growth of adspend in Lebanon mirrors with the GDP contraction where the Lebanese economy saw its economical growth in the first two quarters being fatigued by July/August war to 3.5% GDP growth rate. On the brighter side a 7.2% GDP growth rate is projected for the current year.

Withal, regional advertising has a long way to tread to be at par with the level of ad-expenditure of industrialized economies. While ad spend reaches US$425 per inhabitant in the US and US$ 375 in Europe[5], the figure in the UAE has attained US$200 only, and is approximately US$102 in the GCC region as a whole.

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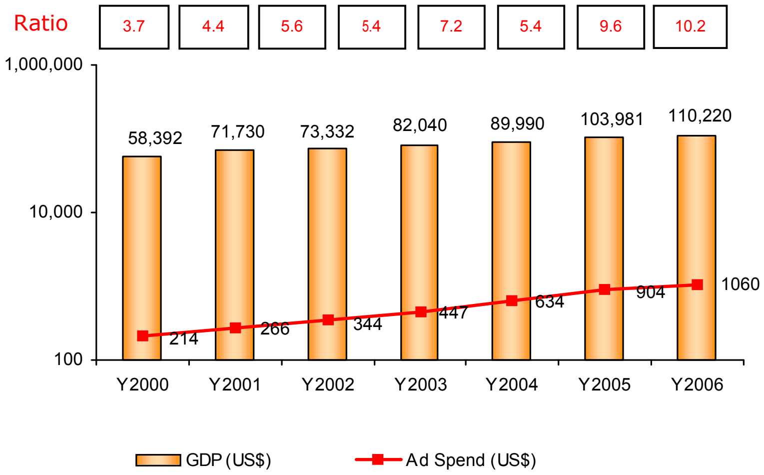
[2] ESCWA-Economic and Social Commission for Western Asia, United Nations

[3] Department of Energy US Government forecasts a 1% decline in KSA GDP's growth of 4.7% in 2006 from 5.6% in Y2005.

[4] www.eia.doe.gov

[5] "Dubai Tops Middle East Advertising League", Middle East Online

Fig. No. 2 **GDP Ad Spend Growth ratio in UAE**



** Figures in red represent the ratio of the respective year*

Fig. No. 3

	GDP (US$) MN	Ad Spend (US$) MN	Ratio Per (000)
Y2000	58,392	214	3.7
Y2001	71,730	266	3.7
Y2002	73,332	344	4.7
Y2003	82,040	447	5.4
Y2004	89,990	634	7.0
Y2005	97,360	869	8.9
Y2006	103,981	1060	10.2
Y2007	110,220	1240	11.3

GDP - Source: ESCWA

The ratio of Ad Spend to GDP has been adjusting over the past 5 years rising gradually from a 3.7 per 000 in Y2000 to 8.9 per 000 in Y2005 and a relatively higher surge in Y2006 of 10.2 per 000.

Growth in UAE's nominal Gross Domestic Product (GDP) was spectacular in Y2005, with Governmental bodies predicting a jump of 23% to touch Dh 597 billion at current prices for Y2006. GDP's growth rate however it seems as forecasted by international think has slightly fatigued in the previous year.

Today UAE's non oil sector economy i.e. the highly diversified business sector and its tourism industry contribute more than half of country's GDP, and have helped fuel a huge construction boom. Billions of dollars are being pumped into showpiece schemes and chic hotels and new skyscrapers are being raised daily with Real Estate sector expected to see the total value of developments rise to more than US$50 billion by the year 2010[6].

In recent years, the country's economy has, to a marked extent, become less dependent on oil and gas, according to Central Bank figures, the contribution of the non-oil sector

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[6] "Construction Trends in the United Arab Emirates", Business Victoria online

to GDP has risen from 54 per cent in 1990 to 71 per cent in 2004 and 73% in the preceding year.

Diversification of the UAE's economy will continue to play a vital role in maintaining growth and stabilising the impact of oil production or price fluctuations. The state has set the rules to conduct the business, ignited the markets and successfully engaged jointly the private sector together with the public sector to offer a partnership that is unique to UAE in the whole Arab world. The UAE Desert Lynx had distant sight of the opportunities that are only similar to those sighted by the Asian Tigers.

A quick glance on the overall ad spend for all the markets shows progression nevertheless a slower growth rate for key markets between Y2005-Y2006, while some markets registering incredible progress as in case of Qatar and Oman, others remaining consistent in their progress.Growth rate fluctuations for individual markets aside, GCC today possess half of the world's oil with member nations envisaging to create a common market in the coming year and to adopt a single currency by 2010[7]. The GCC economies today are being compared to China in terms of surge in export receipts, the substantial current account surpluses, and the large accumulation of foreign assets by the central banks and the rest of banking systems. The investment climate in the GCC countries has substantially improved given the structural reforms that have been implemented over the past couple of years, aiming to strengthen the role of private sector, building the competitiveness of economies and reducing reliability and vulnerability of economies on oil sector by developing non-oil sectors. According to IIF[8] GCC's collective GDP surpassed that of Switzerland in the preceding year and by the end of current year will have almost doubled to $600 billion compared to the average of $300 billion for 2000-02[9]. It seems that the Arabian Desert Lynx (GCC economy) as of today has not only been able to chase the Asian Dragon but also surpassed it significantly.

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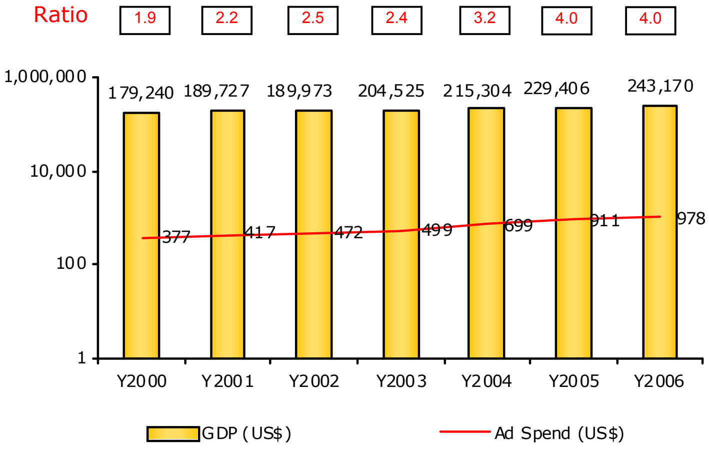
[7] "Profile-Gulf Co-operation Council", BBC News online

[8] Institute of International Finance

[9] "GCC Boom to Enter Fourth Year", Bendo Associates online

Fig. No. 4 **GDP Ad Spend Growth ratio in KSA**



* *Figures in red represent the ratio of the respective year*

Fig. No. 5

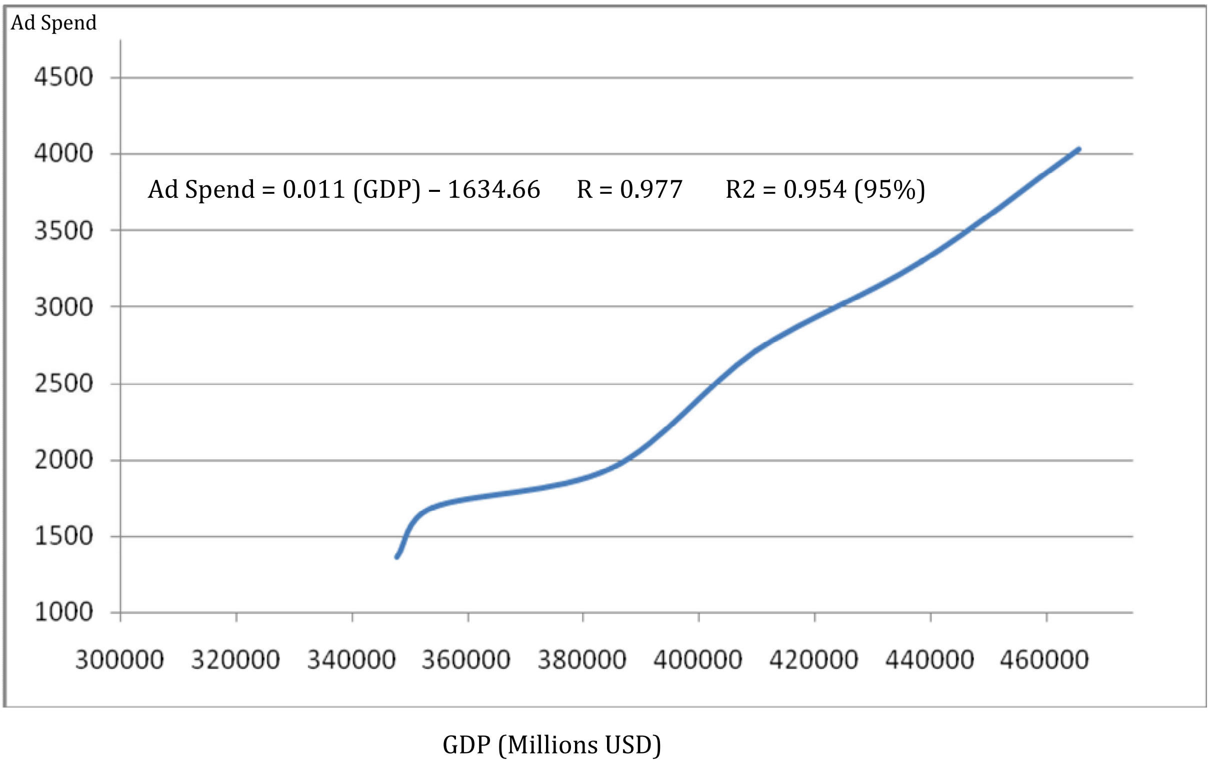
	GDP (US$) MN	Ad Spend (US$) MN	Ratio Per (000)
Y2000	179,240	337	1.9
Y2001	189,727	417	2.2
Y2002	189,973	472	2.5
Y2003	204,525	499	2.4
Y2004	215,304	699	3.2
Y2005	229,406	911	4.0
Y2006	243,170	978	4.0
Y2007	257,517		1.9

GDP - Source: ESCWA

Ad Spend Relationship with GDP in the GCC

A regression analysis of Ad Spend in entire GCC in relation to GDP yields a nearly linear equation of the type y = ax + b presented in the graph below. The extent of representation of the relationship is 98%.

Fig. No. 6 **Ad Spend Function of GDP in GCC Markets**



Conversely the GDP is directly related to the Ad Spend through the equation GDP = 45.5 (Ad Spend) + 282,218.

Year	GDP (Millions USD)	Ad Spend (Millions USD)	Ratio per (000)
Y2000	334,755	1155.8	3.5
Y2001	347,681	1358.6	3.9
Y2002	353,808	1686.2	4.8
Y2003	384,654	1943	5.1
Y2004	409,765	2707.6	6.6
Y2005	438,216	3295.4	7.5
Y2006	465,691	4035.4	8.7

Top players of the Regional Market

GCC media markets domineer over the region, reflecting robust economical health of the member nations. The Pan Arab Regional Media on its own contributed 35% to the total spend, in the preceding year. UAE and KSA being the biggest contributors with 16% and 15% each followed by Egypt and Kuwait 11 and 7% respectively. Eighty three percent of advertising revenues were generated in GCC markets which include the Pan Arab Media; the Levant, which includes Lebanon, Syria; Jordan and Egypt accounting for the remaining 17%.

Media Contribution

The accelerated mushrooming of satellite channels in the market, is now creating ripples at last, with the marketers giving due accreditation to the much overlooked nonetheless most advertising effective platform of television. The ad-spend for TV shot up by 24% compared with last year ,when the situation was of much dismay seeing plummeting in spend for this sector. TV this year attracted 43% of overall ad spend claiming the pinnacle slot in terms of share, the sector as trade' wizards rightly construe is still not being effectively exploited as like Newspapers, primarily because the platform sees major involvement solely from MNCS targeting the entire Pan Arab audience.

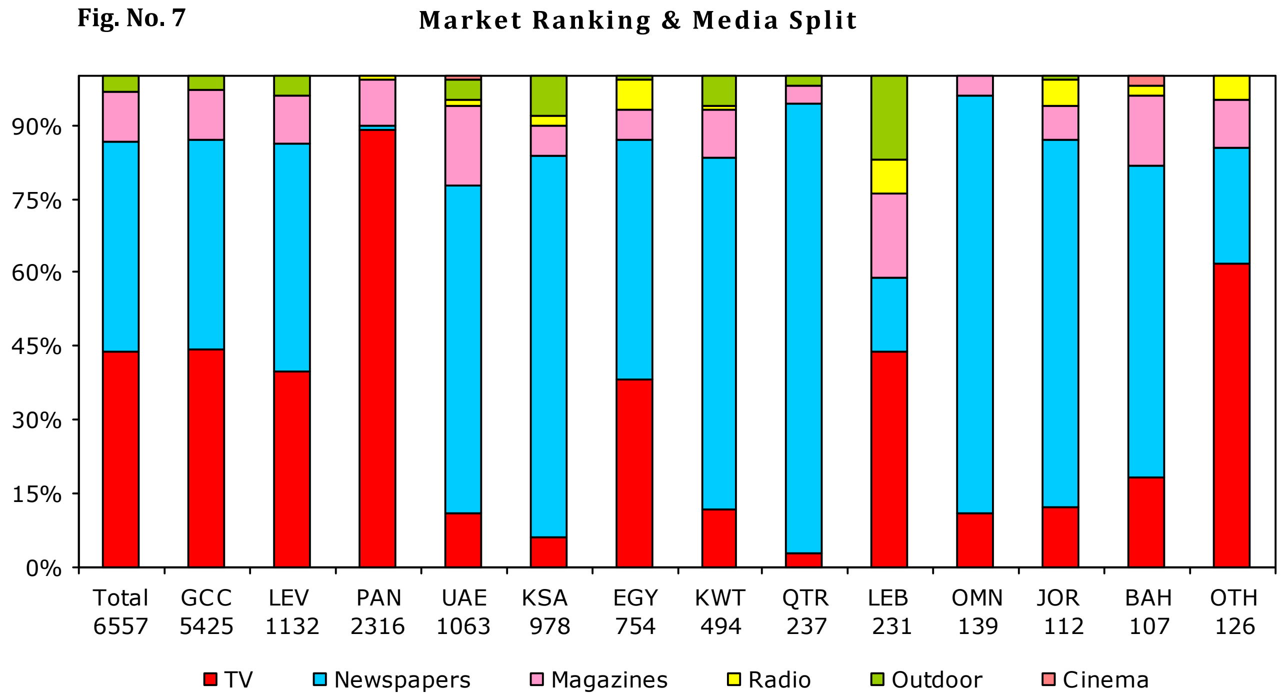
Its Satellite's massive reach, which deters local businesses interested in targeting niche local audiences, to engage with the medium. Print consequentially finds much more incoming revenues from domicile patrons in all the key provincial markets. To add further woes to TV's agony is the prevailing industry outcry on the absence of a common and bona fide audience measurement methodology. Inflationary rate cards added by growing advertising minority are leading to increasing price discounts thus further diluting the attractiveness of TV as a medium of choice for advertisers.

There seems to exist today a vicious circle in the regional TV industry, of marketers keen on lowest cost deals, inducing media buyers to go for long barging sessions on what are thought to be inflated media rates, and in the end media concessionaries offering value addition in terms of airtime and steep discount. There are also hushed up grouses of consolidation in TV sales market, with one consolidated media group stacking up to 70% of the market. Although of late rationalization of sales, better inventory management and limitations is set on pricing discount mechanism have become more frequent, much more still needs to be done further in this regard.

A lot of hope in the aforementioned context is being levied on the forthcoming People Meters project with leading industry representatives syndicating for the rerun of TV metering in KSA in the current year. Middle East TV advertising market given the above pitfalls remains largely undersized by international standards, with several networks mustering relatively low cost per milieu, which as a result makes them impotent to exercise significant pricing yield over advertisers and hence failing to capture significant share of total spend.

Newspapers contributed the second largest share of regional spend with 42% saw steep dive in its growth registering 21% from 34% of last year. Magazine industry attracted 10%, of total ad spend followed by Outdoor getting a share of 3% and Radio attracting 2%. Outdoor increased by 13% over last year and is getting popular with advertisers who are aiming to use "dead-time" of an audience which has sparse leisure time at disposal. The biggest increase is registered by Radio with a growth of 38% vis-à-vis last year's 16% proving airwaves are getting much coveted recognition at last. Radio howbeit remains in forlorn state, with the medium is not being fully made use of by media agencies and a growing concern is with the internet emerging sooner or later in the market the sector might loose the little attention it gets today. Lack of creativity and interest both from the agencies and clients are being pinned at for the platform's underperformance.

Fig. No. 7



Online having entrenched itself as an important media platform alongside traditional media is still not being currently accounted for. This 'web blindness' by the market at large and consequentially by monitoring agencies can be well amounted to under representation of this nascent sector occupying an increasing share in media consumption pattern of the general public.

In the age of blogs and personal portals especially with the key consumer age group of 15-25 its high time media planners acknowledge the importance of the World Wide Web. Nonetheless many advertisers with faltering confidence in TV as a result of fragmented viewing habits of audiences and low engagement in the medium are looking towards the new media.Regional advertising professionals need to recognise the growing medium with global ad spend projected to grow at a rate of 28.2% in the current year, internet is most likely to overtake radio by 2008, and account for nearly 9% of global adspend by 2009.

Spend Seasonality

The start of the Y2006 as like previous year saw the least spend US$396mn in January. Thereafter it gradually picked up and showed a steady increase till the end of second quarter. The third quarter presented the usual summer dip caused by the expected decline of advertising activity in this time period; and again it swelled and recovered the lost ground, in the month of September.

Fig. No. 8 **Ranked Markets Ad Spend & Quarterly Split**

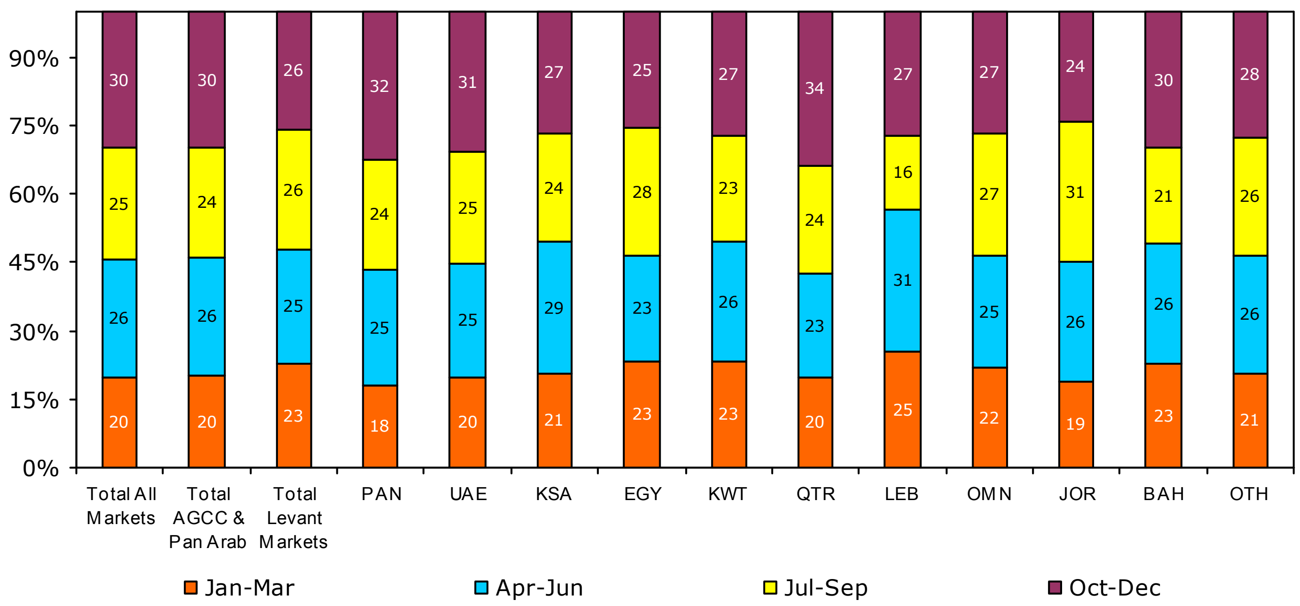


Fig. No. 9 **Monthly Spend Analysis Y2004-2006**

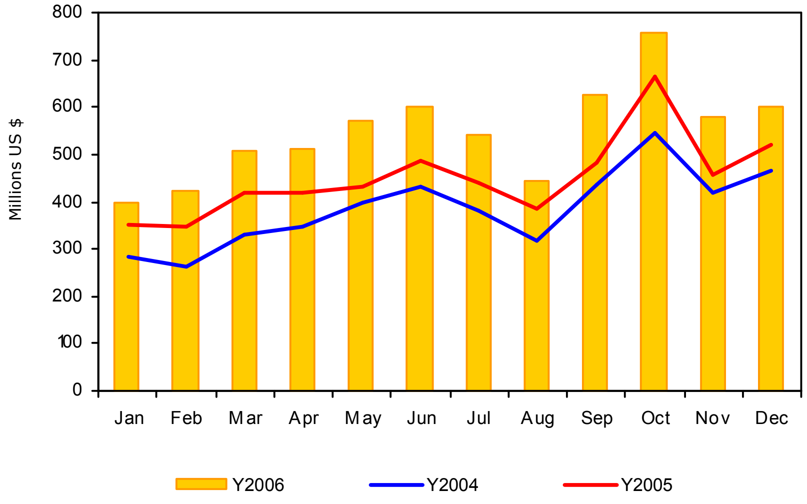


Fig. No. 10

Period	Y2004 US$ MN	Y2005 US$ MN	Y2006 US$ MN	Var'n% Y06/05
Jan	284	351	396	13
Feb	264	349	425	22
Mar	332	419	506	21
Apr	347	418	511	22
May	397	432	570	32
Jun	431	486	600	23
Jul	379	440	544	24
Aug	319	386	438	14
Sep	437	481	618	28
Oct	547	663	757	14
Nov	418	457	580	27
Dec	465	520	599	15
Total	4619	5404	6557	21

Regional TV Scene

Keeping trend with Y2005, last year too the regional media split finds practically no resemblance in any of the national TV markets. The Pan Arab Satellite TV still gets the major share of 73% with the rest 27% going to the domestic markets. Local television-is slowly taking measures but has a long way ahead before it can contend with the satellite onrush currently witnessed in the region. Dearth of innovative programming coupled with failure to allure advertising is to be blamed for this sorry state of affairs of Middle East public broadcasting sector.

In the last fifteen years since the advent of satellite TV in the Middle East, the sector has witnessed significant developments, both in terms of escalated viewership and distribution mechanism. Historically, with analogue/terrestrial advertising supported TV-broadcasting, the number of channels and broadcasters had been restricted by both, a shortage of available broadcast spectrum and protective governmental licensing in the region. Transiting to digital the industry has overcome the problem of spectrum scarcity, making governments allow broadcast operations to be determined by market forces. As a result the regional television in the recent past has seen proliferation of TV channels hosted on media freezone islands in a fashion which has left the advertising sector ‘out of breath’ in keeping pace with this rampant surge.

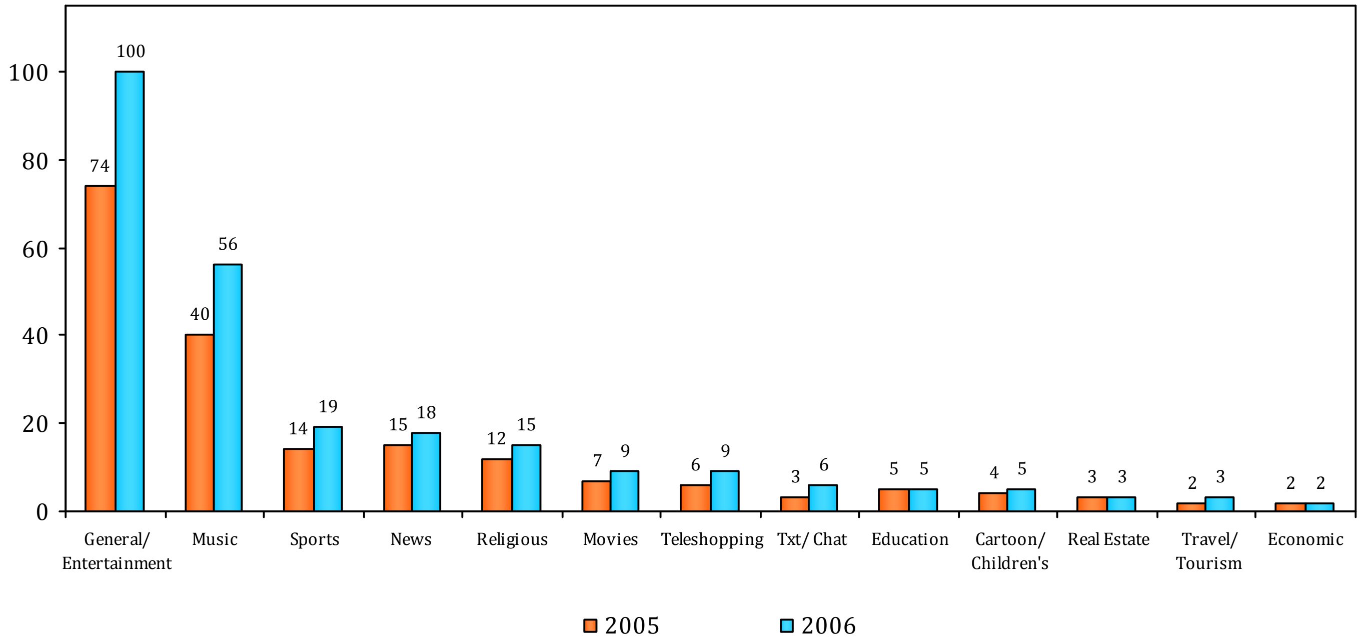
Middle East which only had around two dozen Free to Air stations to its credit fifteen years ago, boasts of 263 free to air stations excluding in excess of 100 Pay TV channels today; with industry experts predicting as many as 500 channels in the Arab World by the end of 2008. Most of them only a few years old, these stations have radically transformed viewing habits for the vast majority of the population in the region, and today Arabs have a choice of Arabic stations that includes, but not limited to, 100 offering general entertainment, 18 channels devoted to news, 56 to music, 19 sports channels, and 15 that broadcast nothing but religious programs. PARC’s data reveals that almost 97% of people in the Middle East region have access to TV of which 75% receive satellite broadcast (analogue or digital) whereas 22% still getting sole terrestrial reception. Pay TV market alone has witnessed a significant growth in the past few years, with more than 1 million Pay TV subscribers’ homes in the region today.

Subscription TV access varies from 5% in the overall market to as high as 29% in the UAE followed by Kuwait with 15% and 3% in the Egyptian market.

Middle East today ranks third in total TV viewing hours, only after North America and Europe; inasmuch, the key GCC markets even surpass Europe, where on an average a viewer watches 4 hours and 10 minutes of TV a day, equivalent to almost 63 full days a year. Many factors such as technological, production, market and social forces have acted catalyst for the current dynamics. In particular population size and ethnic composition remain critical factors for the number of channels that can be supported by a given market; nevertheless GCC with sizeable special interest minority groups, thanks to the swelling expatriate community mosaic of different ethnics, will continue to support a greater number of channels than a similar size market with homogeneous population as highlighted in the case of UAE and Kuwait.

Fig. No. 11

Number of Arabic Language FTA Channels Classifed by Typology
(ArabSat / NileSat)

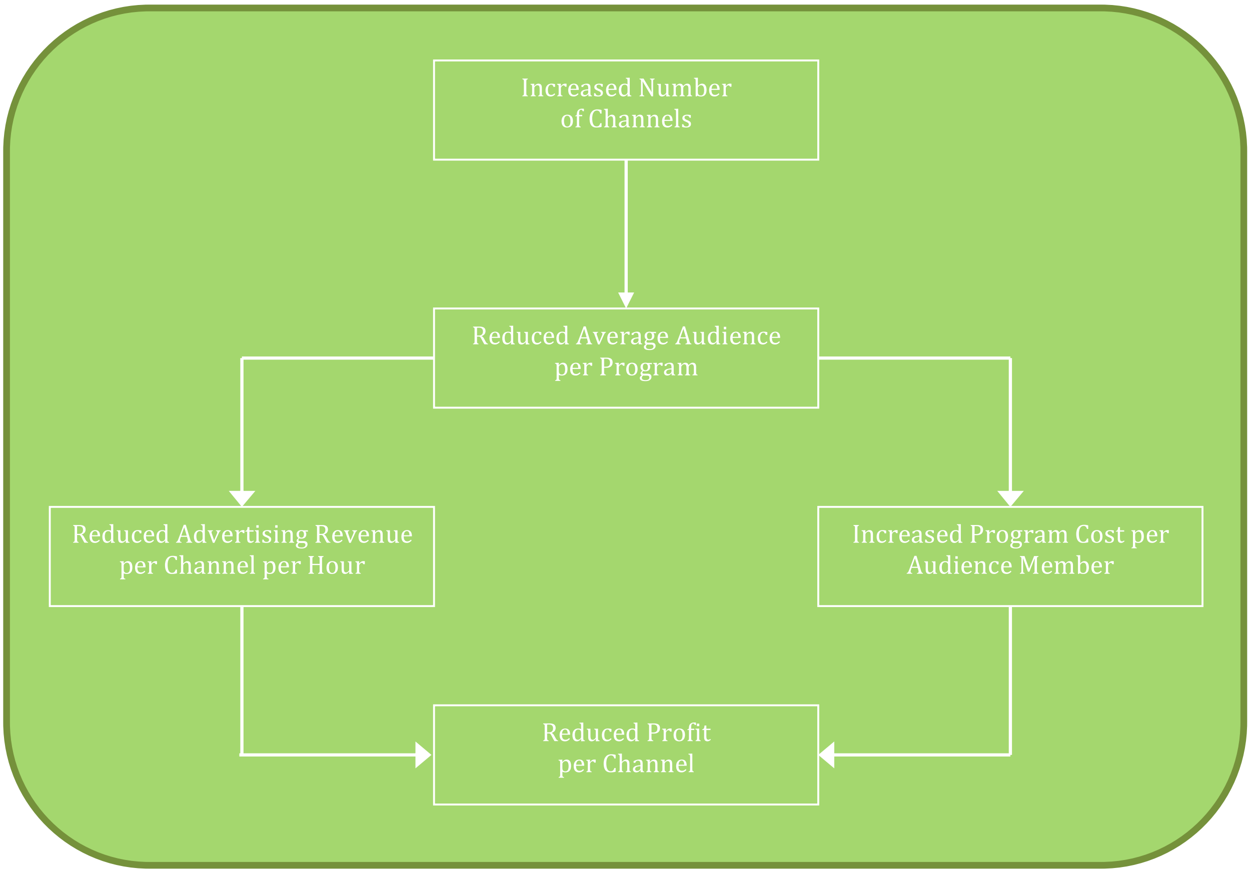


Source: PARC Monitoring Services

But from the industry's perspective analyzing the demand and supply cycle of the region's television industry, what is indubitable is audience' use (demand) has not buildup in proportion to supply of TV channels; if trends in Europe are to be taken as an exemplar, television viewing in EU has lengthened only by 2 minutes per year in the last 10 years reaching an average of 227 minutes per day per adult across 17 European markets, whereas the average in KSA sits comfortably around the 240 minutes per day in the most part of the year, and rises further to 270 minutes per day per average adult during the Holy month of Ramadan.

What the regional TV market is confronting is not unusual taking in consideration the basic axiom of television industry economics; average ad spend of channel declines if ad spend growth does not surpasses channel growth. The scenario eventually turns into a vicious circle of reduced profitability for TV stations, a correct diagnosis of the fiscal ill health of many industry players.

Fig. No. 12

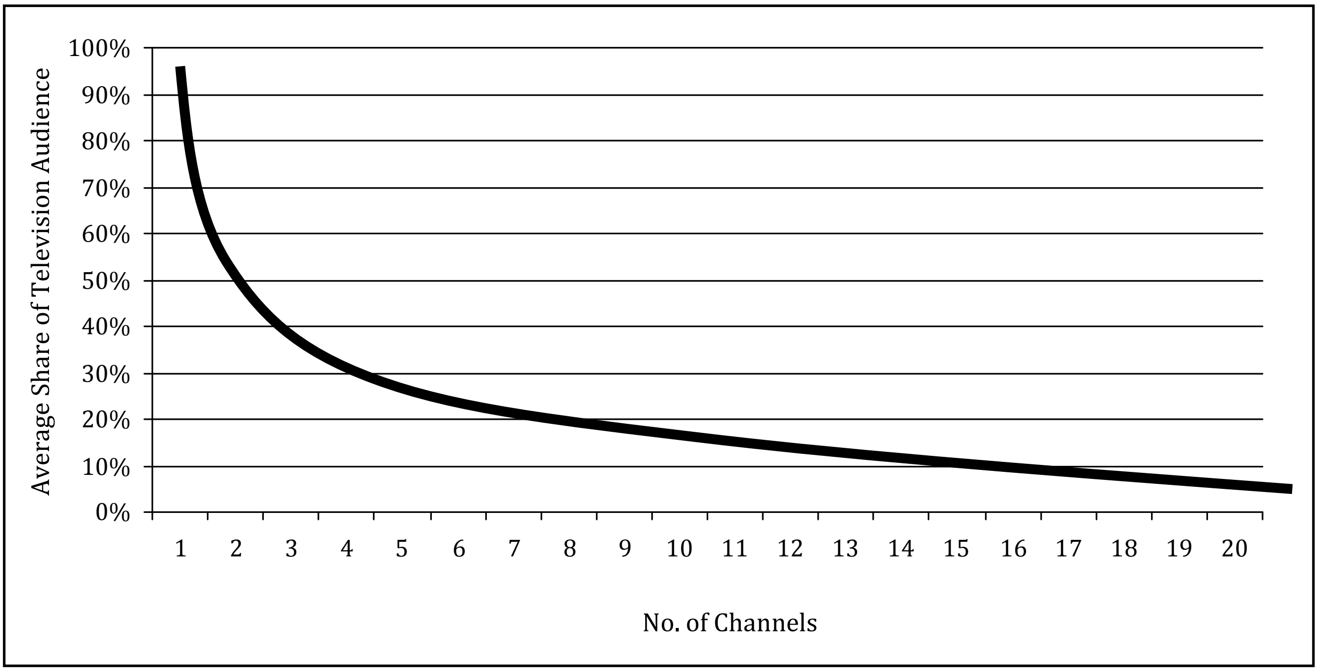


For Illustrative Purposes Only

Today only a handful of FTA channels are profitable where thematic channels are loss making to a large extent. When channels are fewer, viewers tend to have strong channel preferences a yesteryear scenario of regional market, but in a multi-channel environment viewers tend to have strong program preferences rather than channel. Furthermore of late with the availability of endless programming genres, audiences are exhibiting increased usage of genre searching to narrow choices. These viewing' mannerism changes and idiosyncrasies of sifting and shifting remote behavior as trade practitioners and experts opine are catching up with the regional audiences; quite analogous to the US market where average received TV channels in a household are 120 plus, of which average viewed are only 20.

In the current vying scenario, one factor that may be responsible for number of satellite stations to subsist, in addition to deep pocket financers may be reduced programming costs. Most existent satellite operations are currently piggybacking on windowed acquisition of syndicated programs (movies, sitcom reruns etc) and in the process making efficient cost savings by not generating original content. Whether the current strategy of program format acquisition would be viable or lack of primary program content would harm their ratings, is for channel programmers to keep a close account of.

Fig. No. 13 **Effect of Increasing Channels On Average Share Of Television Audience**



For Illustrative Purposes Only

It is clear, however that TV stations which are mandating producers to create own well-researched content have been gaining ground; this being a necessary but not sufficient condition to success.

Facing fierce competition from Pay TV networks in English programming, which sees a significant take-up from expatriates, regional free to air broadcasters have realized there is no sagacity in vying on this platform, hence many are embracing the strategy of generating/ acquisition of Arabic programming. Indigenous Arabic programming is currently getting sizable viewership which will galvanize many broadcasters to follow suit and also encouraged Pay TV platforms to take the same track in days ahead. Nevertheless, broadcasters who are as of now harboring to vertically integrate in-order to acquire programming rights of Arabic content, will have to bear a high cost for doing so; operating in a market where annual cinematic productions sums up to approximately 120 Arabic movies per year. Hampered by the dearth of skilled manpower, technicians, actors, directors etc, generating original content in the region is indeed an upscale proposition. Overall there are claims of local production where leading broadcasters such as MBC claiming "60% of their content being produced locally".

Away from the econometrics of viewership; there is also growing dissatisfaction with the quality of content being offered to viewers. Most networks are being accused of 'cut and paste,' boring, and banal offerings to add further injury to onlookers with a repetitive grid. Almost everyone in the trade is synonymous that growing clutter is harming TV brands.

TV Channels Search for Alternate Revenues

Although unaccounted for TV industry today has started generating revenues from its investment in interactive platform. Today Mobile telephony is becoming a "media channel" in its own rights as music, games, ring tones, interactive TV conjoined make the sector alone worth $42.8 billion globally. Not surprisingly this phenomenon has had positive rub on the balance sheet of stations engaged with interactive content. If there would have been no revenue from this stream going by early pessimism that surfaced in the industry, the reality that more than 30 different channels in the region are running multiple scrolls in their outputs negate this earlier distrust. In the preceding year Middle East market for SMS to Television chat service is estimated for US$ 80mn with youths alone accounting to more than 60% of usage[10].

Overall the struggle of media industry globally in light of changing technological and socio-political trends affecting product generation and dissemination resonates in the region's market. Where most regional players have joined the satellite bandwagon for different political and commercial cravings, what seems clear is that not many have devised a formula for profitability or breakeven in many cases. A TV market which apparently is profitless (for majority) nevertheless does not shy away contemplating HDTV and mobile broadcasting. In fact Qatar launched a mobile broadcasting service last November allowing access to 13 channels of news and entertainment in the process becoming the third country in the world to do so using the Digital Video Broadcast – Handheld (DVB-H) standard, which has been widely adopted across Europe and Asia and similar initiatives soon to be launched in the UAE. Likewise Pay-TV network Orbit, has set up a new company called Media Gates with a special multimedia division that will be fully devoted to developing Made for Mobile content geared toward capitalizing on the region's promising massive mobile industry, as well as creating downloadable material for the web.

Idolizing developed western media markets in offering ground breaking programming and state of the art delivery platforms like DTT and HDTV is fine with two regional broadcasters Al Jazeera International and ART already stepping in the high definition inasmuch the market of 200 satellite stations also has to realize that it has also to shoulder the uncertainties and strategic worries of the industry.

Technological innovations such as TIVO and DVR (current penetration of 6% in the U.S market projected to reach 30% of US households by 2009) Video on Demand (subscription/ free video on demand) have already hit the town. Showtime launched its Personal Video recorder in February Y2006, empowering its viewers to record live television with an option to skip ads too; the extent of take on this technology is evident from the fact, that in its very initial phase, the network had to pull back the launch, running out of stock in the key markets of KSA and UAE! ART likewise successfully

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[10] "Strategic Review of the Television Broadcasting Sector in the Middle East", Booz Allen Hamilton online

made gains from the VOD (Video on Demand) business model by charging customers a one-off fee to watch the football world cup on its dedicated Arabic and English channel in July last year. The era, where the viewer is going to adjudicate what to watch, when to watch, where to watch and circumvent advertising it seems has finally dawned on the region.

Advertisers in the West have started gearing up to these emerging challenges, and the only way to make the lay man not skip advertising is by making advertising message indulging enough as not to be ignored.

Consolidation- TV Industry Issues – some sort of consolidation and strategic map-plan is *sine qua non* for TV industry's profitability; as today out of above 400 TV channels only handful command an audience size to the delight of a media planner.

While the Pay TV market is developing in the region at a great pace, it is still the free to air broadcasters who have the real sway. Regional analyst opine that Arab audiences have become quite used to getting their entertainment for gratis, and hence are shy when it comes to shelling out money for the same. FTA network today are aggressively accelerating efforts to develop comprehensive line up of channels and provide toll-free access to premium quality contents, resulting in palpable clash of interest with Pay TV platform. Continuance on the current course that the industry has taken today will not only deepen losses for FTA operations but also create detrimental market-place for Pay TV's business model to subsist.

Granting the mushrooming of satellite channels, but the fact remains that entire viewership in the key markets of Saudi Arabia and UAE is dominated by less than 15 channels! With over 331 FTA channels in the Middle East compared to a number of 5-30 in the western markets (those too public broadcasters) the sheer over supply cannot be encountered by stimulating advertising growth alone. Given the clash of interest between FTA and Pay TV sector analysts predict its "unify or nullify" option that broadcasters have to choose from. Irrational cannibalization of revenues by leveraging out of economies of scale and scope by both sectors will only aggravate the current confrontation and significantly destroy value for both the platforms.

What is imperative is that both the sectors realize that some sort of business' modus operandi has to be envisaged in pressing. Even with up coming technologies like DTT (Digital Terrestrial Television) on which many FTA broadcasters are banking hopes of profitability, insomuch as the technology makes them capable of engaging local businesses with TV (who traditionally are withdrawn from satellite) will have to bear in mind that the technology has its limitations. DTT can only carry a limited number of channels and can not accommodate 200 broadcasters.

Newspapers: On-Site.... Eyes on the Budgets

Newspapers have traditionally been provincial medium of choice of communication and remain engrained in the media consumption habits of locals, but their dominance is slowly being challenged by TV. With over 100 paid for daily broadsheets published across the region, there remains a clear over-reliance on the Newspaper. More so, newspapers, given the market peculiarities, are the only media platform, which has seen little, segmentation in the region, in contrast to global markets. Segmentation nevertheless has started in the larger markets such as KSA where geographic segmentation already exists at Provincial, National and Trans-National levels that also cross with typologies; also the UAE wherein English language daily category, few publishers offer tabloids and Metro model news output. Harnessing the advances in print technology and versatile licensing arrangements, the market in coming years may witness progressive eventually accelerated segmentation on the lines of ethnicity, content typology, and eventually also different socio/political temperaments subject to political blessings.

Although newspapers have registered lower surge of 21% as compared to 32% of last year; this is more so because as a media platform newspapers are perceived to be most vulnerable to any decline/fluctuation in the GDP (one percent decline in the GDP produces a 3-5 % decline in advertising expenditure) not surprising fact is the case with markets which register below average growth in overall ad spend but see the GDP unaffected only to give an indication of the substantial under-development of the Ad Spend in relation to GDP.

Magazines: Print Tech to Serve Blooming Content

The magazine operating in ‘dual product’ market as their newspapers counterparts seems to be doing well on the side of creating content thanks to technological developments, slashing production costs but laggard however in creating the other product i.e. readership to be sold to advertisers resulting in contribution of 10% (weeklies and monthlies combined) of the total advertising market. This mirrors with the global magazine industry. However, the readership has yet to grow and is anxiously awaiting vigorous marketing and promotion campaigns from publishers before the lack of leisure time at readers’ disposal starts to reduce appetite.

Fig. No. 14

Ad Spend By Chapter Y2004-Y2006

						%Var'n	**Media Split %**					
Advertising Chapter	**Abbr.**	**Y2004**	**Y2005**	**Y2006**	**Sh%**	**Y06/05**	**TV**	**NP**	**MG**	**RD**	**OD**	**CN**
Government/Organization Advertising	GOA	402	629	854	13	36	25	70	3	1	1	*
Communications & Public Utilities	CPU	368	472	756	12	60	71	20	3	4	3	*
Toiletries Hygiene/ House Care Products	THP	585	552	687	10	24	81	5	10	1	3	*
Food Beverages And Tobacco	FBT	553	577	638	10	10	82	6	4	2	5	1
Publishig Media	PUM	320	382	449	7	18	45	43	8	3	2	0
Shopping Malls & Retail Stores	SMR	320	376	444	7	18	20	54	17	3	6	*
Vehicles,Accessories & Supply	VAS	307	379	401	6	6	28	55	12	2	3	*
Financial Services	FS	203	298	385	6	29	24	62	8	2	4	*
Insurance & Real Estate	INR	190	302	371	6	23	15	77	7	1	1	0
Professional Services	PRS	231	287	311	5	9	15	69	12	2	1	*
Hotel, Travel & Tourism	HTT	255	261	272	4	4	24	43	18	4	11	*
Entertainment	ENT	255	220	254	4	15	46	40	10	3	2	*
Clothing,Jewellery & Personal Acs	CJP	188	214	248	4	16	32	29	33	3	3	*
Business/Construct Equip. & Supply	BCS	176	187	214	3	14	22	46	25	1	5	1
Household Appliances	HHA	177	164	162	2	-2	43	40	13	2	2	*
Other Services	SER	89	101	111	2	10	11	73	13	2	1	0
Total		**4,619**	**5,404**	**6,557**	**100**	**21**	**47**	**37**	**10**	**2**	**4**	**0**

Mr. Advertiser

Focusing attention on the spenders in the region across the sixteen chapters tabulated by PARC consisting of varied group of products, this year again Government/Organization advertising tops the chart with ad spend reaching US$854mn. A stepwise up from US$ 666mn in Y2005 and share of 12% of total ad spend, notwithstanding showing a halved growth of 36% as compared to 66% mount of last year. Communications & Public utilities jump two slots to capture runner-up slot this year with budget of US$ 756mn and share of 12% of the total ad spend. The category logged commendable growth with an increase of 60%.

Toiletries Hygiene/House care products get the tertiary slot getting 10% of the total ad spend and a rise of 24%. The poorest faring is made by the Insurance and Real Estate sector so far in the year with a meager growth of 23% as compared to last years 69% growth for this time of the year.

Financial services sector has also showed lame 29% increase vis-à-vis last year's 46% capturing 8th slot on the chart with ad spend of US$385mn. Poor performer of last year entertainment sector, which saw a tumble of 15% with a budget of US$218mn, has registered a growth of 15%. Household appliances category this year registered as the least performer with a downward growth of -2% and a budget of US$162mn.

Fig. No. 15

Top 30 League of Y2006 (000 US$)

Rank & Brand	JAN. TO DEC.		2 YEAR		MEDIA SPLIT % - JAN-DEC Y2006			
	2006	2005	TOTAL	AVG	TV	NP	MG	OT*
1 Mobily	55,383	33,516	88,899	44,450	55	30	1	14
2 Saudi Telecomm	52,070	33,117	85,187	42,594	64	21	2	14
3 Dove	45,396	32,661	78,057	39,029	94	0	4	3
4 Pepsi	44,256	39,689	83,945	41,973	81	9	2	8
5 Chevrolet	38,921	37,978	76,899	38,450	41	50	5	5
6 Toyota	36,679	36,431	73,110	36,555	31	45	10	14
7 Galaxy	36,396	24,336	60,732	30,366	97	1	2	1
8 Coca Cola	35,738	30,960	66,698	33,349	88	5	3	5
9 Johnson & Johnson	33,106	10,607	43,713	21,857	95	0	1	3
10 Iraq Hope & Peace	30,663	9,993	40,656	20,328	100	0	0	0
11 Mobinil	29,603	20,028	49,631	24,816	48	41	4	8
12 Ford	28,083	29,603	57,686	28,843	69	25	2	4
13 Vodafone	27,670	16,604	44,274	22,137	60	29	1	10
14 Ncb	27,376	34,834	62,210	31,105	47	43	2	8
15 Doha Asian Games	26,830	101	26,931	13,466	62	34	3	1
16 Nokia	26,766	36,077	62,843	31,422	24	49	18	9
17 Watani - Uae	24,507	0	24,507	12,254	95	5	0	0
18 Emaar	24,418	18,361	42,779	21,390	44	53	3	0
19 Knorr	23,908	21,803	45,711	22,856	100	0	0	0
20 Lipton	23,867	36,619	60,486	30,243	94	1	0	4
21 New Boy	23,367	16,186	39,553	19,777	100	0	0	0
22 Pantene	22,163	17,773	39,936	19,968	95	0	4	0
23 Dubai Properties	20,836	10,024	30,860	15,430	57	38	4	0
24 Samsung	20,291	16,832	37,123	18,562	42	42	11	4
25 Maggi	19,727	11,862	31,589	15,795	98	0	1	1
26 Sunsilk	19,629	24,860	44,489	22,245	95	0	2	3
27 Nissan	19,233	22,891	42,124	21,062	27	50	13	10
28 Al Marai	18,998	9,931	28,929	14,465	51	11	1	38
29 Lux	17,666	19,005	36,671	18,336	93	0	4	3
30 Etisalat	17,530	7,309	24,839	12,420	60	32	5	4

**OT=Radio+OutDoor+Cinema*

Top Spenders of Y2006

All Media

Mobily bagged the highest spender slot in Y2006 with US$55mn, using all media. The next four top spenders, in descending order of spender are, Saudi Telecom US$ 52mn, Dove US$45mn, Last year's highest spender Pepsi falling three places with US$ 44mn.

Television

Dove emerged as the highest spender in TV advertising in Y2006 with US$ 42.4 million. Followed by Pepsi US$ 35.8mn the tertiary slot was captured by Galaxy with US$ 35.1mn.

Newspapers

Automobiles and Telecom were the leading spenders in news dailies sectors in the departed year. Chevrolet bagged the first slot US$ 19.2 million followed by Mobily US$ 16.6 million, Toyota US$ 16.4 million.

Magazines

Nokia retained its largest spender position in magazines with US$ 48.1 million albeit seeing a downturn of 26% vis-à-vis Y2005. The other big spenders were Toyota US$ 37.9 million, Damas US$ 34.9 million and HP US$ 31.4 million.

Time to analyze

Y2006' 21% growth overall is much better than 17% of Y2005 inasmuch with both pleasant and unpleasant surprises; Qatar, Bahrain, and Egypt to some extent being the welcome developments whereas ad-spend downsize in key markets being the latter. Never before has Middle East's advertising market looked as promising as it does today with most market growing at double-digit rates, and being identified as fastest growing market for 2007 by global media agencies[11], this can be well understood by the fact that six out of the 10 fastest growing markets in the world represent the region.

The Ten Fastest-Growing Ad Markets Growth (%)

Rank	Market	Growth %	Rank	Market	Growth %
1.	Qatar	304.2	6.	Pan Arab	146.8
2.	Egypt	220.7	7.	Russia	143.2
3.	Moldova	185.7	8.	Saudi Arabia	113.5
4.	Romania	160.4	9.	Kuwait	113.2
5.	UAE	154.8	10.	Slovakia	106.4

Source: Zenith OptiMedia

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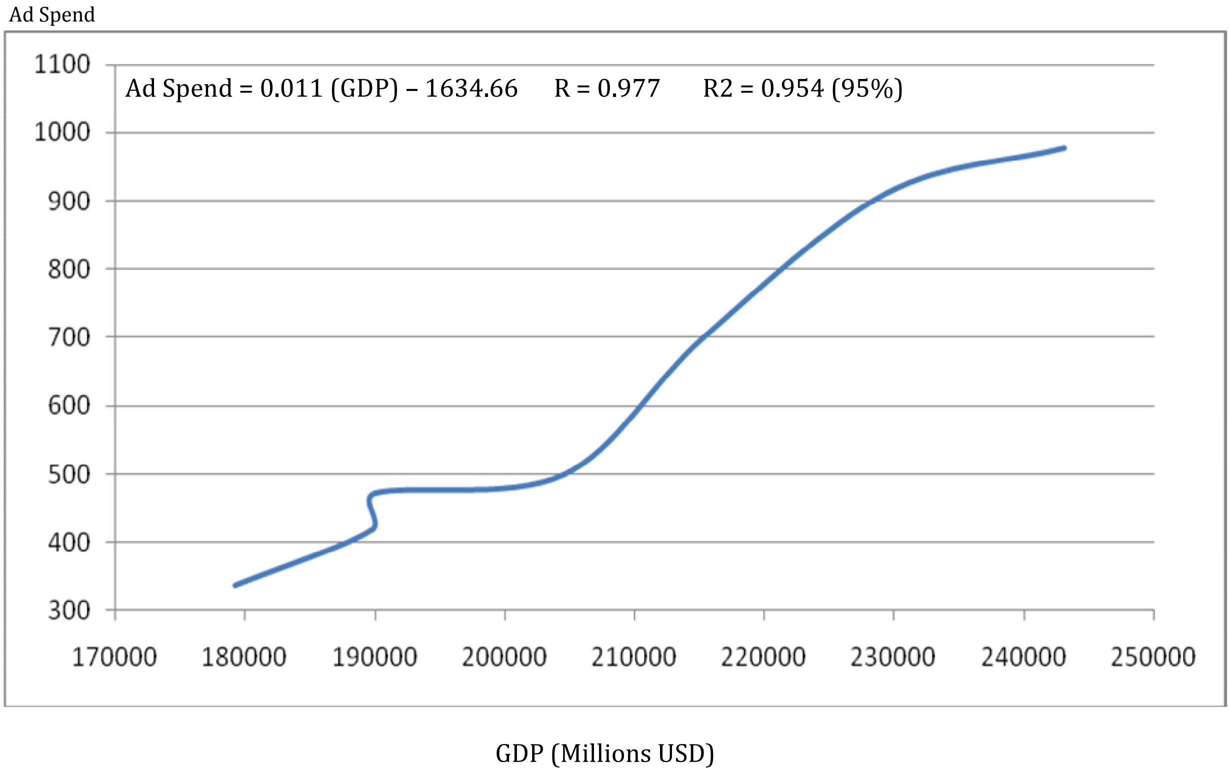
[11] http://www.zenithoptimedia.com/gff/pdf/Adspend%20forecasts%20March%202007.pdf

The market all said and done has to gear up to the coming challenges of technical and intra industry convergence, which will impact general users consumption and contact with all the media platforms, be it television, radio or print. Regional media companies in days ahead are going to be confronted with market changes that may present risks that could destabilize their very existence, shocking, as it may seem. The process is complex as there is no single force behind the changes; instead pressure is coming from technological forces, production forces, market forces and social forces simultaneously. The problem is compounded because the regional media industry in the past operated in lower level of competition and requires the experience or knowledge base to operate in rapidly changing markets.

Ad Spend Relationship with GDP in KSA Media Market Y2000-2006

A regression analysis of Ad Spend in KSA in relation with the GDP yields a nearly linear equation of the form y = ax + b illustrated in the graph below. The extent of representation of the relationship is 95%.

Fig. No. 16 **Ad Spend Function of GDP in KSA Media Market**



Conversely, the GDP is directly related to the Ad Spend through the equation GDP = 90.9 (Ad Spend) + 148,604.

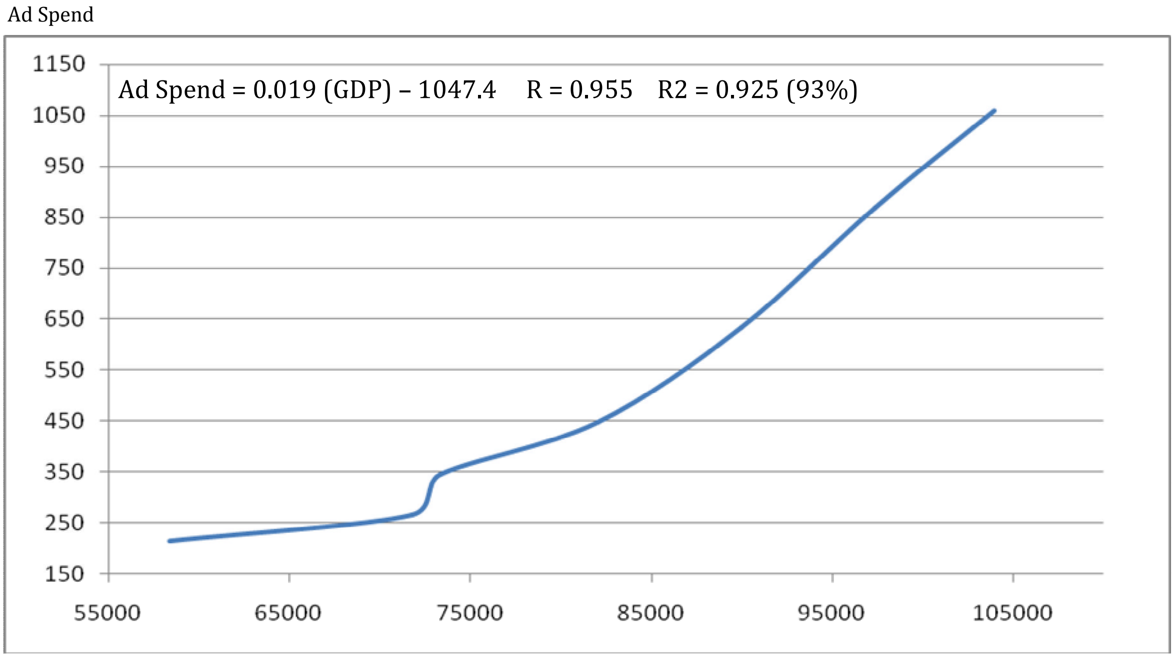
The equations presented above define a direct relationship of Ad Spend and GDP. In the past few years GDP has been propped up along with the oil prices and their windfall were felt across the whole Arab World both in the oil producing countries, being at the source of the increase, and also the other Arab markets that benefit from expatriate remittances and stimulated foreign trade business.

The model offers a closer representation of the UAE case leading to interesting contributions on the forecast market.

Ad Spend Relationship with GDP in UAE Media Market Y2000-2006

A regression analysis of Ad Spend in UAE in relation to GDP yields a nearly linear equation of the type y = ax + b presented in the graph below. The extent of representation of the relationship is 93%.

Fig. No. 17 **Ad Spend Function of GDP in UAE Media Market**



Conversely the GDP is directly related to the Ad Spend through the equation GDP = 52.63(Ad Spend) + 55,126.

Economists offer forecasts for continued growth of the GDP; Ad Spend follows suit.

The need of the hour is for media practitioners to optimize their understanding of this new environment as their responsibility and accountability towards their audience amplifies. Competition is going to be much stiffer in days ahead clouded with 'volatility' element a characteristic of the region's industry looming around for a considerable time as the market bridges from nascence to maturity. Going by the predictions of industry pundits growth prospects are brighter for media and entertainment industries now than they have been since the late 1990 with the sector's spending predicted to reach US$ 1.4 trillion[12] in the commencing year with a 4.8 percent Compound Growth Rate (CAGR) over the next five years. These predictions ensure much more dynamism in networking of regional media markets co fuelled by a greater penetration of digital and wireless technologies. Spurred by broadband, next generation technologies will significantly strengthen growth opportunities for television distribution such as DVB-H, satellite radio, video games, internet access and home video in the region. New media in particular will be an emerging platform with almost 153 million household globally being broadband enabled in the passing year, this sector will see a an impressive escalation of consumer online spending, getting its much coveted attention finally by regional advertisers and businesses alike. In background of these revolutionary happenings, media companies that will stay ahead of the curve will be those who have factored these changing dynamics into the hearts of their strategic planning operations.

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Pan Arab Research Center

ADVERTISING SPEND ANALYSIS ACROSS REGIONAL MARKETS IN Y2006

Y2006 ADVERTISING SPEND: TOTAL MARKETS - OVERVIEW

Movers & Shakers

The total advertising spend of the region for Y2006 shows a healthy soar of (+21%) from 2005's US $ 5.4 billion to US$ 6.5 billion. A much better performance from (+17%) growth registered in Y2005. Overall if we are to grasp a chronological progression for last year's growth; the consolidated *Arab Advertising Market* has doubled its growth: taking 2004 as base year it increased by 17% in 2005, cumulating 42% in 2006 over 2004.

The advertising growth rank palette nevertheless seemed quite upturned in 2006, where the spear-headers of Y2005 pared (down) in contrast to the emergence of a few underdogs. On the brighter side, Qatar outstripped its neighbors registering an astounding 101% spend accretion; hosting the Asian Games last autumn the island nation deservedly beaconing as the fastest growing economy in the world. 2005's runner in fronts and traditional market' potentates UAE & KSA although retaining their top-slots, slackened in terms of growth, with a watered upturn of 22 & 7% in 2006 as compared to 37 and 30% upshot of preceding year

Egypt also registered a positive spur in Y2006 second highest in the league of 40% as compared to a much lower performance of 21% in the preceding year; followed by Oman, logging 32% growth as its growth trickled down by 14% vis-à-vis' 2005.

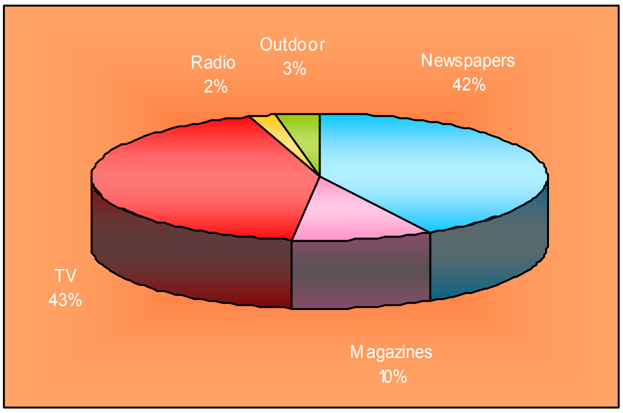
Bahrain put in a much better show with 3% accreditation in its growth compared to 05' when it saw a downward trajectory of (-11%). Jordan suffered quite a set back seeing its growth dwindling from (+42%) in 2005 to meagre (+4%) in 2006.

Lebanon tragically again bore the ramifications of political turmoil in 2006 seeing debacle of (-14%) in continuation to 2005's (-2%).

Market Rankings

Pan Arab Regional media market by virtue of its sheer scale outweighed other individual markets in 2006 with US$ 2.4bn a 24% hike from previous year. In 2006 UAE still maintained its vanguard position overshadowing KSA with US1.06bn. KSA got the runner-up rank with US$978mn succeeded by Egypt which retained its third ranking by logging an extraordinary growth of 40% with US$754mn. The remaining markets maintained their 2005' tiers, nevertheless where some markets like Qatar US$237mn, Oman US$ 139mn catapulted, others like Bahrain US$107mn registered paltered growth. Lebanon being the only country reporting recession of (-14%) with US$ 231mn.

Distribution of advertising expenditures in Total markets by medium, 2006 (% share)



The spending cut across for all the four major media were as follow: **Television** contributing a share of 43% US$ 2.8mn small screen logged a growth of (+24%) from preceding year. TV's growth is commendable given in 2005 it was meagre (+4%). FMCG dominated TV advertising with biggest spender being Dove US$ 42mn whereas. The biggest cutback in Top spenders league in TV came from Lipton which saw a slash of (-35%) in its ad spending with US$22mn.

Newspapers were the second highest contributor with a share of 42% US$2.7bn registering a weaker spur of (+21%) than (+34%) of 2005. Chevrolet was the biggest client for Newspapers with US$19mn, with the biggest cutback coming from telecom client Nokia (-36%) US$ 13mn. **Magazines** were the third highest contributors with US$ 631mn contributing a share of 10% to the total regional ad spend registering an increase of (+12%) from 2005. **Outdoor** with fourth highest contribution US$ 206mn logged a surge **of** (+19%). **Radio** accounting a share of 2% with US$ 141mn recorded the highest growth (+38%) which is quite an achievement given the fact that the medium registered (+16%) growth in 2005.

Cinema: Whilst all the other media platforms ad spend soared in size over preceding year, Cinema advertising suffered a downturn of (-15%) as compared to 2005's positive growth of (+8%).

Top Advertisers: Traditional heavy spender Government/Organizational sector were the biggest spender in continuation in 2006 contributing a share of 13% to the total regional advertising spend. In solo act footing Telecom dominated the heavy spenders category with Mobily emerging as the biggest spender using all media with US$55mn followed by Saudi Telecom US$ 52mn and Dove getting the third spot with US$ 45mn. All three top spenders were new entrants in 2006.

Advertising Expenditure by Medium in US$

	Total	Newspapers	Magazines	TV	Radio	Outdoor	Cinema
Y2004	4619	1702	466	2190	88	162	12
Y2005	5402	2275	562	2275	102	174	13
Y2006	6557	2752	631	2816	141	206	11

Markets Ranking & Media Contribution (US $ Millions)

						%Var'n	Media Contribution (US $ Million)											
Rank & Market Name			Y2004	Y2005	Y2006	Y06/05	Television	Newspapers		Magazines		Radio		Outdoor		Cinema		
1	Pan Arab Media	PAN	1,779	1,872	2,316	24	2.054		28		209	25			0		0	
2	United Arab Emirates	UAE	634	869	1,063	22	119		701		175	11			47		9	
3	Kingdom Of Saudi Arabia	KSA	699	911	978	7	59		751		62	23			83		0	
4	Egypt	EGY	445	540	754	40	289		365		48	47			4		0	
5	Kuwait	KWT	382	438	494	13	58		355		50	4			27		0	
6	Qatar	QTR	93	118	237	101	7		219		9	0			4		0	
7	Lebanon	LEB	276	270	231	-14	102		35		38	17			39		0	
8	Oman	OMN	72	105	139	32	15		117		6	0			0		1	
9	Jordan	JOR	76	108	112	4	14		84		8	6			1		0	
10	Bahrain	BAH	116	103	107	3	20		67		15	2			0		2	
11	Other Markets**	OTH	47	70	126	80	79		31		12	6			0		0	
	Total AGCC & Pan Arab	**GCC**	**3,802**	**4,451**	**5,425**	22	**2,390**		**2,258**		**534**	**72**			**162**		**12**	
	Total Levant Markets	**LEV**	**818**	**953**	**1,132**	19	**426**		**495**		**97**	**70**			**44**		**0**	
	Total All Markets	**M$**	**4,619**	**5,404**	**6,557**	**21**	**2,816**		**2,753**		**631**	**141**			**206**		**12**	
						i%		i%		i%		i%		i%		i%		i%
				Y2004	4,619	100	2,190	100	1,702	100	466	100	88	100	162	100	12	100
Markets Growth Index (Base Y2004)				**Y2005**	5,404	117	2,275	104	2,275	134	562	121	102	116	174	108	13	108
				Y2006	6,557	142	2,816	129	2,753	162	631	135	141	160	206	127	12	98

Y2006 ADVERTISING SPEND: Pan Arab Media

Advertising: Pan Arab Regional media market by virtue of its sheer scale outweighed other individual markets in 2006 with US$ 2.4bn a 24% hike from preceding year continuing to occupy the top spot in the league table for advertising spend in the region. The pan-Arab share of the total Gulf advertising pie represented 35% share of the consolidated Arab Advertising Market; it sees its biggest contribution of 89% share coming from

Television US$ 2054 mn clocking a growth of (+25%) from preceding year. Pan Arab was the biggest spender in the regional spend table for TV advertising. Pan Arabian TV channels given their extensive reach and wide popularity have traditionally been the favourite medium for advertisers.

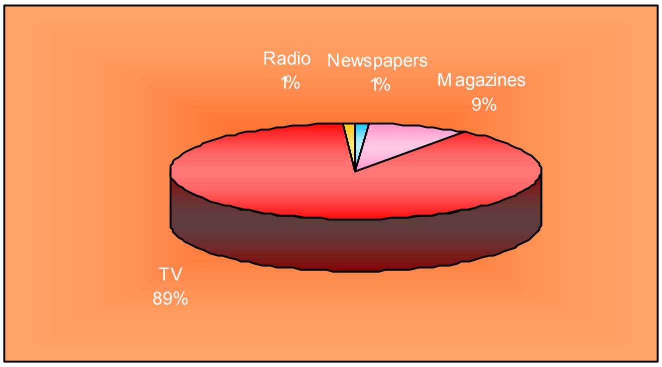
Magazines were the second highest contributor with US$ 208 mn contributing a share of 9% and registering an increase of (+16%) from 2005. Pan Arab was the biggest contributor in the Regional Magazines sector; the highest contribution from Pan Arab' magazine platform is understandable taking into account operandi-dynamics of the magazine industry. No other media outlet globally has the advantage of crossing over their operative boundaries internationally as magazines do. Language barriers can be easily overcome particularly in case of Consumer titles; local editions can be published or the title reprinted in other languages without necessarily loosing any of the magazine's flavour or relevance. Pan Arab titles are wisely exploiting the benefits of selling beyond their home grounds (Pan Arabia offers one of the largest markets, in terms of language uniformity i.e. Arabic for any regional magazine publisher to exploit).

Newspapers was the only sector registering decline of (-12%) in the forgone year seeing its share of 2% in 2005 being halved to 1% in 2006 to the value of US$28mn.

Radio On the other hand, registered the highest growth over the preceding year with (+126%) rising from US$11mn in 2005 to US$ 25 mn.

The Pan Arab Media market saw a strong growth during the last three months of 2006 contributing 32% with US$ 750 mn to the total ad spend, which helped to offset the slow start to the year. Regional advertising experienced major challenges earlier in the year owing to the impact of financial markets conditions on the advertising activities of companies, prompting a reduction in advertising spending during the first quarter.

Distribution of advertising expenditures in Pan Arab by medium, 2006 (% share)



Top Advertisers: Last year highest spender in the region Iraq Hope and Peace slips two spots to number three with US$ 30.6 mn. FMCG clienteles bag the top two slot with Dove on number one with US$ 40.04 mn followed by Galaxy US$ 31.76 mn. The biggest cutbacks in Television advertisng (-36%) came from Lipton with US$ 20.7 mn followed by Sunsilk (-23%) with US$ 16.7 mn.

Advertising Expenditure by Medium in US$

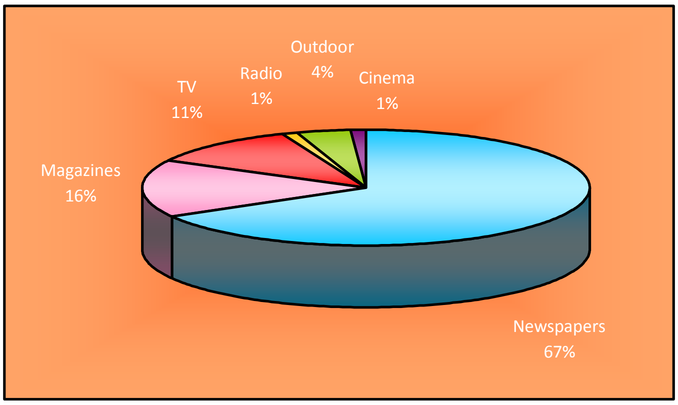
	Total	Newspapers	Magazines	TV	Radio
Y2004	1,779	32	148	1,596	3
Y2005	1,872	32	179	1,649	11
Y2006	2,316	28	208	2,054	25

Y2006 ADVERTISING SPEND: United Arab Emirates Media

UAE advertising expenditure increased by 22% in the 12 months to December last year to top the US$ 1.06bn mark for the first time Advertising expenditure in UAE rose from Y2005' US$869mn to $ 1.06 billion, continuing its reign of the regional advertising spend' league table. Expenditures were down in first quarter of 2006 as a repercussion of outwardly factors like the sad demise of Dubai's late ruler HH Sheikh Maktoum Bin Rashed al Maktoum and subsequent cancellation of Dubai Shopping Festival, which is a major driver of advertising spend across all trade and hospitality sectors. The ad spend recovery began in the second half of 2006, characteristic to the regional market where ad spend soars towards the end of the year seeing abatement in the middle. Amongst the spending cut across for all the four major media, **Newspapers** as always dominated with a share of 66% US$ 702mn clocking a growth of (+33%) from preceding year. **Magazines** were the second highest contributor with US$ 175 mn contributing a share of 16% and registering an increase of (+18%) from 2005. Other media to see an increase in advertising expenditure was **Outdoor** (+13%) aided by Exhibitions and screen displays contributing 4% share of US$ 47mn.

Television: Whilst the print and outdoor ads spend contribution continued to soar in size, advertising expenditures for television suffered a setback in 2006. TV with a share of 11% US$ 119mn saw a (-10%) fall from prior year, with notable decreases coming from automobiles and event industries. Few rises and new entrants amongst the top spenders were recorded nevertheless on the small screen; representing the real estate, government and other organizations. Television early evening time slot alone saw a significant mount of (+27%) in terms of attracting advertising revenue from preceding year whereas all the other day parts suffered slumps, particularly morning slot with a recession of (-32%) from last year. Advertisers it seems are allocating a larger proportion of their budget to press advertising at the expense of TV adverts, and perhaps also because of Print's ability to target home market directly unlike satellite TV' addressing Pan Arab audience at large.

Distribution of advertising expenditures in UAE by medium, 2006 (% share)



Radio advertising albeit contributing a meagre 1% share US$ 11mn registered the highest growth (+41%), which may well be accounted to cropping up of stations targeting different ethnicities amongst the multicultural Diaspora of UAE.

Cinema advertising totalling US$ 9mn saw a downturn of (-14%) from 2005, a plethora of reasons, from lack of attention of planners to dearth of customised advertising for the medium are to be blamed for the drop of silver screen's advertising.

Top Advertisers: Traditional heavy spenders Government and Insurance & Real Estate still contributed with maximum share of 21 and 16%in 06. Expenditure on advertising for food beverages and Tobacco products fell by 13%, while publishing media spent a worrying 10% less than in 2005. The biggest growth sector was Communications & Public Utilities advertising, where spending increased by 105%. Overall the top three spenders using all media for UAE in 06 were Watani-UAE US$ 14.6 mn followed by Emaaar US$ 9.2 mn and Etisalat US$ 8.8 mn.

Advertising Expenditure by Medium in US$

	Total	Newspapers	Magazines	TV	Radio	Outdoor	Cinema
Y2004	634	345	113	123	11	34	8
Y2005	869	527	149	132	8	42	10
Y2006	1,063	702	175	119	11	47	9

Y2006 ADVERTISING SPEND: Kingdom of Saudi Arabia Media

Traditional market potentate contrasted the robust growth trajectory of its arch rival i.e. leader market UAE and registering a medium-low (+7%) growth in the preceding year vis-à-vis (+27%) of Y2005.

Ad Spend in KSA rose to US $ 978 million in 2006 over US$ 911mn in 2005. Expenditures fluctuated with a slow start in the first quarter reaching pinnacle in the second quarter (US$ 282mn) followed by dipping in the third quarter and elevating again in the last quarter. There are multitudes of apparent factors being pointed at for KSA's checked progression for 2006. With some blaming the ad-spend slash by Insurance and Real Estate sectors; majority see the stock-market turbulences earlier in February Y2006, which wiped off half of the value of the Arab world's largest bourse in 60 trading days as the main cause. The stock market turnover estimates fell to SR16.33 billion from SR 19.52 billion in the same time period. What has also to be taken account of is the fact that revenue drain from the Saudi market into Pan Arab ventures (given that most media entities are owned or partnered by Saudi investments) has diluted the strength of the home market. More importantly, prognostications of growth slag at macroeconomic front for the foregone year, by international think tanks, for the main GCC markets should also be taken in consideration for ad-spend slumps for Y2006 in case of KSA.

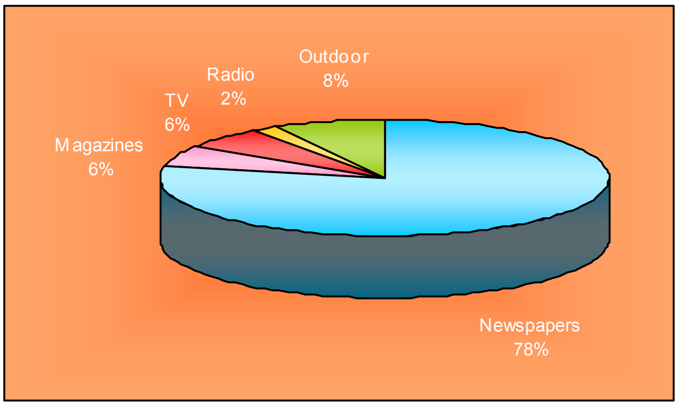
The spending cut across for all the four major media were as follow:

Newspapers as a norm occupied the Lion share of 77% US$ 751 mn clocking a pale growth of (+6%) vis-à-vis (+43%) logged in 2005. Nonetheless KSA in solo act footing was the biggest spender compared to its regional counterparts.

Outdoor was the next highest contributor with a share of 8% US$ 83 mn; registering the second highest growth in Y2006 of (+37%) after Radio.

Magazines and **Television** contributed 6% each with both seeing plummeting of (-1%) and (-10%) in their respective ad spend; inasmuch marking the second consecutive year of downward tumble for the latter. TV saw a significant cut back from its high spenders in the FMCG and automobile sector whereas Telecom sector dominated the high spender category.

Distribution of advertising expenditures in KSA by medium, 2006 (% share)



Morning time slot on TV registered the highest surge in attracting ad-revenue with growth of (+88%), whereas afternoon (-53%) and early evenings (-31%) saw decline in ad-revenues. The uncertainty of advertisers is slowly reflecting in Saudi market, echoing the trend being seen in regional markets for Television.

Radio advertising albeit contributing only 2% share registered the highest growth of (+42%) which is commendable given the medium registered a negative growth of (-20%) in the year bygone.

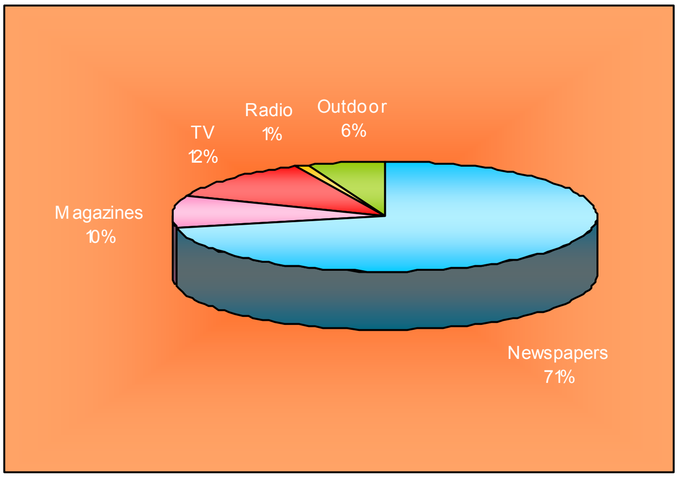
Advertising Expenditure by Medium in US$

	Total	Newspapers	Magazines	TV	Radio	Outdoor
Y2004	699	495	55	74	20	55
Y2005	911	706	63	66	16	61
Y2006	978	751	62	59	23	83

Y2006 ADVERTISING SPEND: Kuwait Media

Ad - spend in Kuwait rose (+13%) in 2006 from previous year's US$438mn to US$ 494 mn, capturing the fourth spot in the league table of the regional advertising spending. Expenditures were down in first and third quarters with increase in the second and last quarters of 2006 Amongst the spending cut across for all the four major media, Newspapers dominated contributing the biggest chunk with a share of 72% US$ 355 mn logging a growth of (+18%) over last year. Television was the second highest contributor with US$ 58 mn contributing a share of 12 % registering an increase of (+30%) from 2005. Magazines captured the subsequent slot with a share of 10% US$50mn albeit seeing a decrease of (-14%) over Y2005's US$58mn. The biggest slump of (-42%) was seen in Radio which saw its share contribution to the total national ad spend being halved from 2% in 2005 to 1% in 2006 but promises a significant escalation in the current year with the new stations operating in the country. Other media to see an increase in advertising expenditure was Outdoor (+3%) contributing 6% share of US$ 27mn. Overall the top three spenders using all media for Kuwait in 06 came from Telecom and Government sectors with National Assembly capturing the top position with US $ 7.82 mn followed by Mtc-vodafone US$ 6.70 and Wataniya Telecom US$ 6.27 mn.

Distribution of advertising expenditures in Kuwait by medium, 2006 (% share)



Advertising Expenditure by Medium in US$

	Total	Newspapers	Magazines	TV	Radio	Outdoor
Y2004	382	271	49	27	6	29
Y2005	438	302	58	44	7	27
Y2006	494	355	50	58	4	27

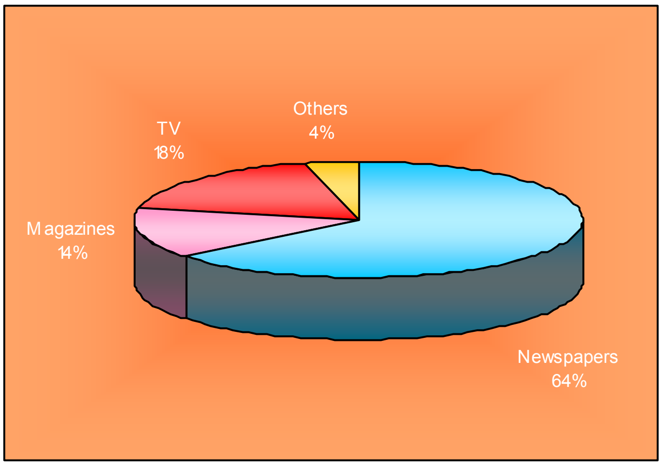
Y2006 ADVERTISING SPEND: Kingdom of Bahrain Media

Bahrain registered a slight growth but at the lower end of the scale in the region with a swell of meagre (+3%) from US$ 103 mn in 2005 to US$107mn in 2006. Bahrain as a result from being number 6 in the regional advertising spend league table of 2005 slipped three places to be at number 9 in 2006. After a slow start in the first quarter synonymous to the region, growth picked up towards the year end albeit dipping in the third quarter. There's also been a re-distribution of expenditures among media channels in the country. The media which lost ground were Television (20% down). Media which gained were *outdoor, cinema and radio*-- combined (20% up), and magazines (11% up) followed by Newspapers (9% up). Newspapers advertising was the dominant medium in terms of attracting ad man's moolah generating US $ 67 mn accounting for a 63 % share of total adspend of 2006; nonetheless with a much feeble increase of (+9%).

Television bagged the runner up slot contributing a share of 18% to the value of US$ 20mn, the platform saw a downward growth of (-20%) albeit to a lesser extent in continuation of foregoing year's trend when it was (-46%). Although Magazines which saw an upshot of (+7%) in 2005 registered a positive spur of (+11%) accruing US$ 15mn in 2006. *Radio, Outdoors and Cinema*-- combined contributed a share of 4% US$ 5 mn.

If one does SLEPT analysis for Bahrain; Grand Prix motor racing emerges as the highlight in the bygone year, which not only had positive effect on the economy and advertising market but also attracted global' attention towards the country. No wonder Bahrain International circuit captures the numero-uno slot in terms of spending.Overall the top three spenders using all media for Bahrain in 06 came from Bahrain International Circuit and Telecom sectors with Bahrain International Circuit capturing the top position with US $ 2.101 mn followed by Batelco US$ 2.05 and Mtc Vodafone US$ 1.94 mn.

Distribution of advertising expenditures in Bahrain by medium, 2006 (% share)



Advertising Expenditure by Medium in US$

	Total	Newspapers	Magazines	TV	Others
Y2004	116	56	13	45	3
Y2005	103	61	14	24	4
Y2006	107	67	15	20	5

Y2006 ADVERTISING SPEND: Qatar Media

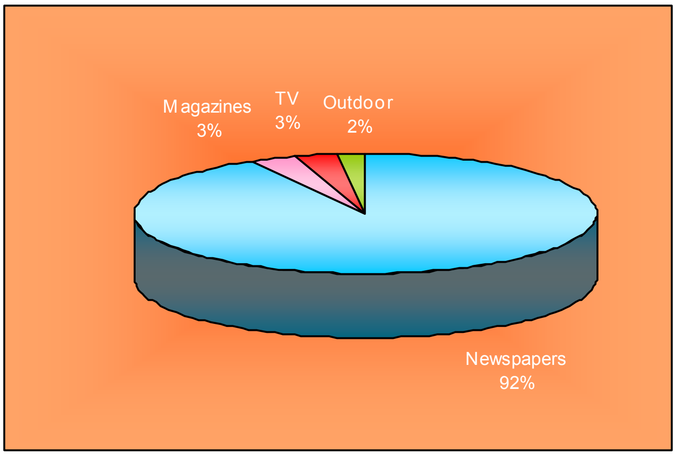
Qatar host for the Asian Games last autumn, logged the maximum increase in spending, which rose (+101%) from US$118m to $237m.

Print advertising remained the dominant medium with US $ 226 mn accounting for a 95 per cent share during 2006. Of this, 92 per cent went to daily newspapers and 3 per cent to magazines. The (+96%) growth registered by **Newspaper** is astounding as compared to (+34%) in the preceding year. **Magazine** likewise with US$8mn accruing a share of 3% saw exponential growth of (+306%) as compared to last year swell of just (+5%). **Television** followed with 3 per cent.

A quick SLEPT analysis of the country can indicate towards progressive economic and farsighted leadership endeavours in the last decade as a result of which the island nation today beacons as the fastest growing economy in the world. The pace of economic expansion in Qatar is breathtaking. As recently as 1995 GDP stood at $8 billion compared with $34 billion last year and by 2011 the forecast is for $62 billion. This compound growth rate of 15 per cent places Qatar at the top of the world GDP growth table.

At the same time, Qatar is using its energy revenues to diversify its domestic economy these moves have also led to general increased confidence in the peninsula, and more interest from advertisers becoming the fifth biggest spending market in the Arab region. Overall the highest spender in 2006 using all media was Doha Asian games with US$ 9,104 mn followed by Q-tel US$ 6,132 mn and Qatar National Bank US$4,904 mn.

Distribution of advertising expenditures in Qatar by medium, 2006 (% share)



Advertising Expenditure by Medium in US$

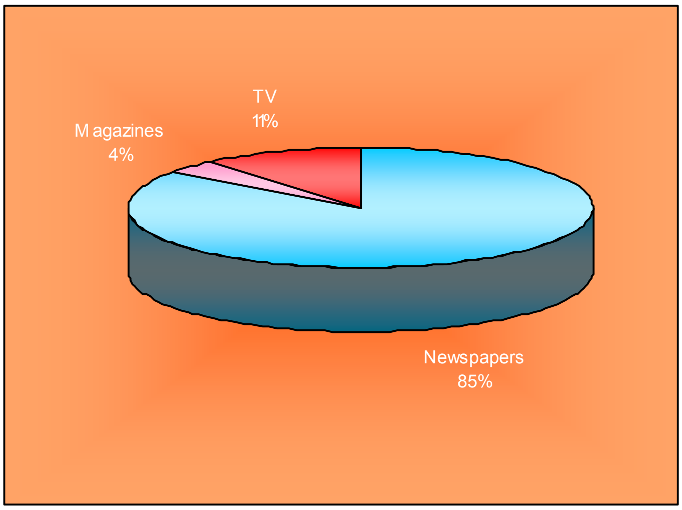
	Total	Newspapers	Magazines	TV	Others
Y2004	93	83	2	7	1
Y2005	118	111	2	5	0
Y2006	237	218	8	7	4

Y2006 ADVERTISING SPEND: Oman Media

Ad spend in Oman rose by (+32%) in 2006. A much better performance than the regional growth rate of 24%; Oman registered the third highest growth after Qatar and Egypt in the regional market from US$ 105mn in 2005 to US$ 139 mn in 2006 mounting two places up in the regional advertising spend ladder from preceding year. The Omani market saw a much balanced growth with upshot in the last quarters.

Newspapers advertising in Oman maintaining their King share with 85% US$118mn registered the highest growth (+37%) over Y2005. Television captured the next pinnacle slot contributing a share of 11% with US $ 15 mn and logged a positive spur of (+11%) over previous year. Magazine spending increased by (+15%) amounting to US$ 5 mn capturing the tertiary slot. The biggest spenders in all the media came from Banking and Telecommunications sectors with Bank Muscat being the biggest advertising clientele approximately with US$ 4 mn followed by Nawras Telecom US$ 3.3 mn and Mobile Telecom US$ 3 mn.

Distribution of advertising expenditures in Oman by medium, 2006 (% share)



Advertising Expenditure by Medium in US$

	Total	Newspapers	Magazines	TV	Others
Y2004	72	53	5	13	1
Y2005	105	86	5	14	1
Y2006	139	118	5	15	1

Y2006 ADVERTISING SPEND: Egypt Media

Egypt has registered the second highest soar after Qatar in the regional market of (+40%) from US4 540mn in 2005 to US$ 754mn in 2006 retaining its tertiary slot but gaining enormous momentum for the years to come.

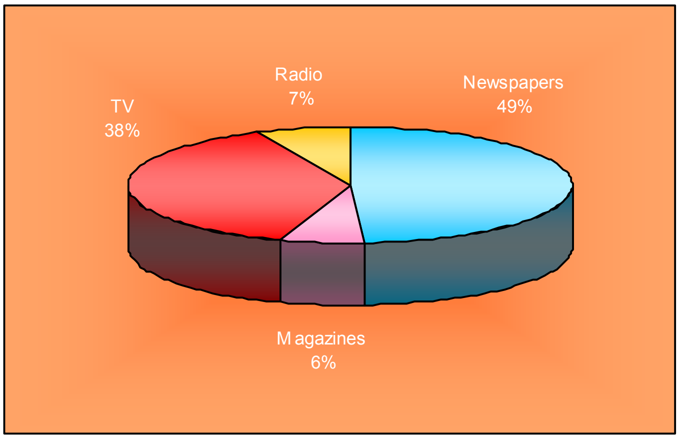
The Egyptian market has seen strong growth during the last two quarters of 2006, which helped to offset to some extent a comparatively slower start in the year.

Television advertising in Egypt registered the highest growth (+63%) over Y2005 emerging as the second biggest contributor with a share of 38% US$ 289mn only after Newspapers. Egypt dominates the regional market in supply of new television serials and films; and likewise is the only other exceptional market in the region where domicile broadcasters get a healthy share of the advertising pie. **Newspapers** captured the pinnacle slot contributing half of the total ad spend of the country with US $ 365mn and logged a positive spur of (+23%) compared to figures of 2005.

Magazines spending increased by (+31%) accruing US$ 6mn.

The biggest spenders in all the media came from Telecommunications sector with Mobinil capturing the numero uno spot with US$ 19.9mn followed by Vodafone US$ 15.8mn and Ranin US$ 9.3mn.

Distribution of advertising expenditures in Egypt by medium, 2006 (% share)



Advertising Expenditure by Medium in US$

	Total	Newspapers	Magazines	TV	Others
Y2004	445	234	30	156	26
Y2005	540	297	37	178	28
Y2006	754	365	48	289	51

Y2006 ADVERTISING SPEND: Kingdom of Jordan Media

Kingdom of Jordan registered a slight growth in the region with a swell of (+4%) from US$ 108 mn in 2005 to US$112 mn in 2006. The growth rate is much worrying given that last year the Kingdom registered a positive spur of (+42%). Newspapers advertising as a norm remained the dominant medium with US $84mn accounting for a 75 per cent share during 2006 with a feeble increase of (+7%) compared to last year when the growth registered by the sector was (+42%). Lack of creativity and planned campaigns are being blamed for the emerging distrust and budget-slashes for the medium in Jordan.

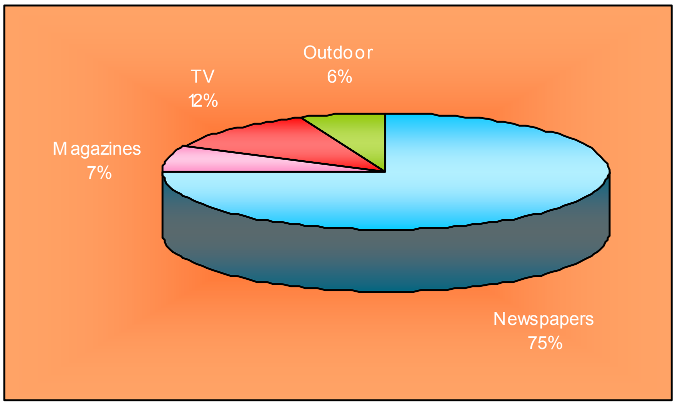
Television contributed the second highest share of 12% with US$ 14mn here again the growth registered a nearly flat (+1%) dashing away from Y2005 (+63%) when it was highest vis-à-vis other media. Magazines contradictorily is the only sector which has fared much better over previous year (+46%) contributing a share of 7% of US$ 8mn.

Other sectors combined (radio + Outdoor+ Cinema) saw a worrying decline of (-37%) in 2006 whereas in 2005 the sectors combined logged a growth of (+43%).

A quick SLEPT analysis of the country can indicate that the only positive push Jordan's advertising industry is getting is due to business friendly political legislations resulting in liberalization of telecom sector.

Jordan currently has four mobile operators, and telecommunication sector is by far the largest spender in advertising including TV spots, print ads, radio and various outdoor postings, with Fastlink being at the top slot with US $ 4.1mn followed by Jordan National Bank US$ 3.8mn and Umniah US$ 3.6 mn.

Distribution of advertising expenditures in Jordan by medium, 2006 (% share)



Advertising Expenditure by Medium in US$

	Total	Newspapers	Magazines	TV	Others
Y2004	76	55	5	8	8
Y2005	108	78	5	14	11
Y2006	112	84	8	14	7

Y2006 ADVERTISING SPEND: Lebanon Media

Media hub of yesteryears Lebanon was the only country registering a recession of (-14%) in the regional advertising spend league table. Lebanon's downtrend is understandable given the fact that the country tragically again became the centre of international attention for all the wrong reasons, forbearing aggression from its neighbour this time around, just after it had gained some threshold in the precarious political climate post Hariri's assassination.

Political turmoil not surprisingly disrupted advertising networking and caused a much steeper slump in the market of (-14%) vis-à-vis 2005's (-2%); while the initial conflict happened in summer, its consequences on the national scene were devastating and lingered for several months thus checking the damage to a large extent.

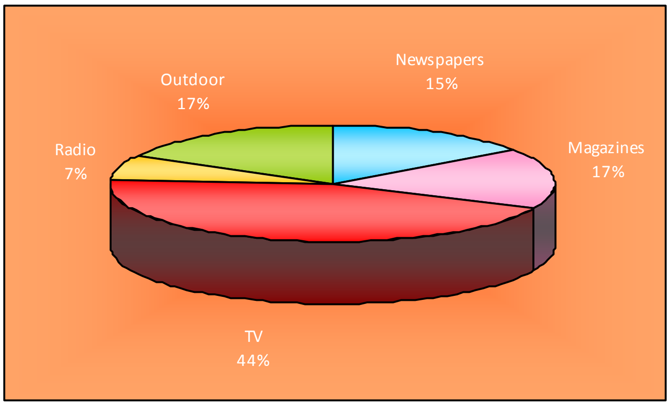
Advertising spend in Lebanon plummeted from previous year's US$ 270mn to US$ 231mn in 2006. Expenditures were severely down in the third quarter after peaking in the second quarter. Amongst the spending cut across for all the four major media, **Television** as characteristic to the region dominated in the war stricken year contributing the biggest chunk with a share of 44% US$ 102mn seeing a downturn of (-22%) over previous year.

Lebanon being the cultural production hub domineering the market in supply of television content (serials and films); as an exception sees the biggest contribution coming from Television compared to other markets, proving that home based broadcasters are still successfully holding onto their share of the national advertising pie.

Magazines with US$ 38mn emerged as second highest contributor close on heels was Outdoor with US$ 39mn contributing a share of 17% each.

Newspapers captured the subsequent slot with a share of 15% US$ 35mn albeit seeing the biggest fall of (-25%) over Y2005's US$ 47mn. The biggest increase in ad moolah was registered by **Radio** (+4%) contributing a share of 7% to the total ad spend. **Outdoor** recorded no variation in its ad revenue of US$39mn from preceding year contributing a share of 17% to the total ad-spend. The top three spenders using all media in Lebanon 06 came from Banking and FMCG sectors with Byblos Bank capturing the top position with US$ 11.90 mn followed by Pepsi US$ 6.95 mn and Coca Cola US$ 6.56 mn.

Distribution of advertising expenditures in Lebanon by medium, 2006 (% share)



Advertising Expenditure by Medium in US$

	Total	Newspapers	Magazines	TV	Radio	Outdoor
Y2004	276	55	34	132	19	37
Y2005	270	47	38	130	16	39
Y2006	231	35	38	102	17	39

Pan Arab Research Center

PRODUCTS & SERVICES

Adhoc Research

Pan Arab Research Centre is a multi-faceted company with a wide variety of interests.

The scope of our ADHOC studies is very diversified and covers the following:

- Usage and Attitudes Studies, General Consumer Studies, Consumer insights studies.
- Customer Satisfaction Studies: Retail service oriented companies, Organizations in the private and government sectors.
- Brand Positioning and Brand Equity Studies, Corporate Image Studies.
- Employee Attitudes and Morale / Staff Satisfaction Studies.
- Price Perception Tests for consumer goods and services.
- Advertising and Package Communication studies.
- Advertising, Consumption and Brand Image Tracking Studies for consumer goods, retail service oriented companies.
- Shoppers and Users profile Studies.
- Products Usage and Taste Tests.
- Public Opinion Polls, Human Needs and Satisfaction, Human Values and Beliefs.
- Trade and business development Research
- Market Assessment

Quantitative Ad hoc Research

We employ quantitative research techniques to gather information that is quickly comprehensible, directly interpretable and factually presentable.

The specialized quantitative analysis suites *e.g.* MDS Brand Mapping, Price Sensitivity, Consumer Market Segmentation, Conjoint and SWOT analyses are done based on clients' requirements.

Other types of Ad hoc Research

When interviews and discussions do not help the different research techniques may be used:

- Mystery Shopper visits
- Observation studies
- Desk Research

Quantitative Research Methodology

Our Research Methods

- Sample Design: Rigorous implementation of statistical sampling systems. General Public samples are stratified, Multi-Stage Random Probability

- Sampling Fraction: Constant

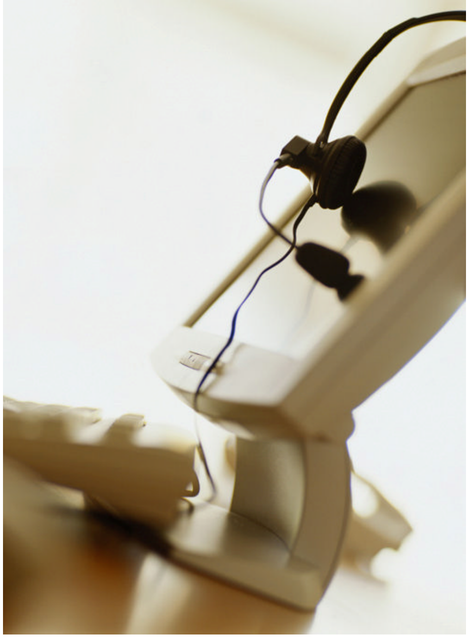
- Household Selection: Random, Controlled

- Member Selection Within Household: Random, Controlled

- Sampling Statistics: Sampling Path and Response Rates Carefully monitored and Documented

- Survey Implementation: Careful attention to details at all stages
    - Questionnaire preparation
    - Survey Manual
    - Pre-Test
    - Interviewers Briefings
    - Mock-up Review
    - Accompaniment
    - Re-interviewing
    - Field Teams

CATI: Computer Aided Telephone Interviews



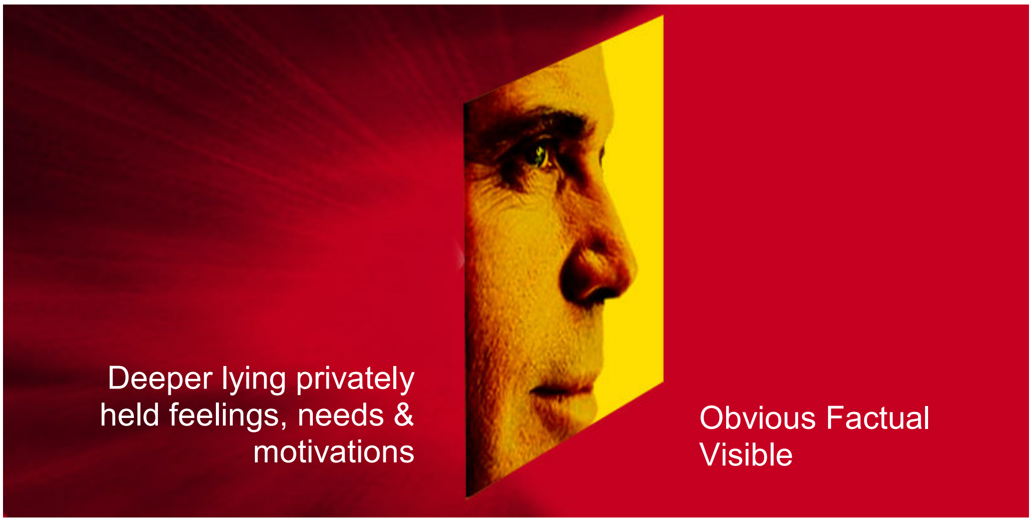
PARC introduced CATI services in 1987.
Whatever the target group, or the survey universe, we always adopt a rigorous disciplined approach to sampling, carefully monitored and sampling measures which are continuously controlled.

CATI, Computer Assisted Tele-Interviewing, consists of a Call Center, Central Computer, CATI Software, and a team of interviewers operating Workstations equipped with telephone lines, whereby the questionnaire for a survey is converted into a computer program and interviews are administered to randomly selected target members by well-trained tele -operators.

Qualitative Diagnostic / Motivational Research

When the consumers are not explicit, we employ qualitative diagnostic research and apply psycho-dynamic survey techniques.

Human behaviour can be observed through visible facts… a stream of rational factual information, stated justifications, open-lying emotions… But, that is just on the surface.



- Human behaviour is steered by deeper-lying emotions, needs and motivations…that live under the surface.

- Our researchers are fully trained to explore the emotions, feelings, imagery, and deep lying motives through Qualitative diagnostic techniques of Focus Group Discussions and In-depth interviews. We also employ Psycho-dynamic research techniques to bring out the real motivations which are often left unexpressed in ordinary situations.

Quantification of Qualitative studies findings: Motivational Groups

- Approximate sizes of motivational groups exhibiting different strategies are gauged using advanced statistical techniques.

- Each motivational strategy group is determined by a particular set of descriptive statements.

- Quantification delivers for each motivational group
  - ✓ Projected size in the Universe
  - ✓ Socio economic profile
  - ✓ Consumer profiles on key usage factors

Syndicated Research

Vehicles

- Omnibus
- Telebus
- CAPS Clinic for Advertising performance system
- Consumer Panel
- Equitrack Advertising and Brand Equity tracking

Syndicated Quantitative Studies

- Affluent women lifestyles, luxury goods and Media
- Top executives lifestyles, Business Services and Media
- Passenger cars and lubricants
- Mobile phones
- Air travel and tourism
- Health care

Syndicated Qualitative Studies

- Money, Banks and financial services
- Body Care and personal hygiene products
- Women in the Gulf
- Car and driver
- Milk, Cheese and Dairy products
- Cold Beverages

Omnibus Face To Face

Concise Crisp Questions…Precise Prompt Answers

Interviews are conducted face to face with representative sample of adults 15 years and over at home.

Clients can include their questions in the Omnibus study at 15 days advance notice before the field work starts and get desired results without commissioning a full scale research and in a cost effective manner.

Telebus - CATI

Quick Questions… Quick Answers

The Telebus, using CATI (Computer Assisted Telephone Interviewing) speeds up data acquisition and reduces overall survey turnaround time; data can be obtained soon after the completion of the interviews. It is particularly suitable method when the client has limited information requirement and no visual aids are required while interviewing.

Syndicated Research

CAPS - Clinic for Advertising Performance System

Regional Advertising Research service, offers a statistical benchmarked measurement and diagnostic assessment of TV commercials for the Gulf, Saudi Arabia and the Levant. TV commercials are shown to the respondents to capture spontaneous reactions, and obtain measures of overall performance and ratings on several attributes.

Consumer Panel

A Diagnostic tool for efficient marketing which offers information on:

- Category Market size and share of a brand and competitors
- Penetration
- Frequency of Purchase, average weight of Purchase
- Depth of Trial
- Extent of loyalty
- Segmentation by usage characteristics
- Gain & Loss Analysis
- Analysis of Pricing
- Analysis of Customer Retention indicators

Key Benefits Unique to PARC Consumer Panel help marketers understand purchasing dynamics, at different stages of brand launch trial and adoption, the socio-economic profile of buyers, obtain consumer feedback to promotional campaigns, identify the best media support to advertise the brand, and study the impact of promotion on brand sales.

Regions of Operation

The PARC consumer panels operate in Saudi Arabia, Egypt, UAE, Kuwait and Lebanon on a semi-recurrent basis.

Syndicated Research

Equitrack

Brand tracking research delivers a set of statistical measurements which help monitor how results of marketing efforts impact a client's brand equity.

- Trends: evolution of penetration levels for categories, products and brands
- Key measures of awareness
- Key measures of usage patterns and
- Assess effectiveness of the marketing activities of client's brands Vs key competitors during advertising and non-advertising periods.

Objectives:

Main purpose is to evaluate the effects of advertising and marketing activities on the brand's equity evolution from the consumers' point of view on a continuous basis. Measurements are projected against the Socio-Economic Background, Lifestyles and Psychographic Factors.

Equitrack and Brand Health Indicators

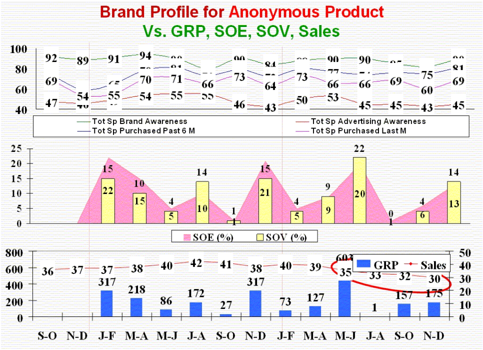
Equitrack is instrumental in evolving, diagnosing and maintaining brand positioning, and enhancing Brand Health.

Equitrack also **Integrates Consumer Panel Data + Brand Health Indicators + and Several other Information Sources:**

- Tracking Research data
- Advertising Monitoring data
- Media Research Analysis data
- Simulation
- Other Sources

Equitrack offers Continuous tracking data on main brand health indicators

- Brand awareness, affinity, usage, purchase, retention and future purchase intent
- Advertising awareness, Visual elements and message retention
- Image perceptions



Equitrack presents External Continuous Data

- GRP's (Gross Rating Points)
- SOV (Share of Voice)
- SOE (Share of Expenditure)
- Retail Sales Data etc.
- Consumer Purchase Data (Consumer Panel)

Mystic: Mystery Shopping Analysis System

Mystic, a very advanced software system for data handling and reporting Mystery Shopping Research findings. It is a comprehensive multi-function system that offers the following modules:

Mystic Events: this starts from data capture of shopper's records and processes the relevant statistics to post them to clients through a web solution.

Clients receive alerts, read scored records, together with accompanying PARC's Analyst's comments, option to append own comments and forward same to relevant channel Manager to take action on the issues of concern and may return his action standards.

Mystic Events is offered in two modules:

- Events Web is the web solution networking all parties: PARC, the project co-ordinator, and branch management
- Events Server is the resident system for archival of scored records and review of problems and compilation of historical records

Mystic Analyzer: this is the system to analyze the statistical data from numerical scores and to drill down within the different service attributes at all levels of interest to client. A range of statistical measures and functions are hosted.

Mystic Events features a comprehensive web solution offering the following:

- Login based privileges to management and branches
- Search and View completed field visits questionnaires based on date / period / visit / shopper code for different branches or transactions.
- Options to view whole questionnaire or selected pages
- Option to download and print a number of selected questionnaires in one command
- User may append own comments on visit in comments box.
- User may email a number of selected questionnaires to relevant branch management

- Results or selected questionnaire Total Scores are automatically generated into an Excel Sheet together with comments and emailed to concerned parties.
- Numerical Score may be produced based on the selection of the period / branch / region / city and per page if required by the user.
- Graphical analysis of numerical scores for different attributes.

A comprehensive storage and archival system allows user to back-up completed questionnaires for all visits for subsequent reference and analysis, with all above features.

At the core of mystic engine is a "**Magic Cube**" that hosts data and presents many features:

- User-friendly analyzer that performs cross-tabulations of data across many dimensions within the different service attributes (rows and columns) and determine variations of the measures and trends experienced by customers overtime.
- Analyze data per period / region / branch and perform time series analysis and graphical analysis of the attribute scores based on the selection of the dimensions (rows and columns)
- Export tabulations to the Excel software

Moster©: Monitor Satisfaction To Ensure Retention

PARC introduces *MOSTER*© Model (***MO***nitor ***S***atisfaction ***T***o ***E***nsure ***R***etention), a revolution in measuring *Customer Satisfaction*.

"It will not suffice to have customers who are merely satisfied. An unhappy customer will switch. Unfortunately a satisfied customer may also switch, on the assumption that he could not lose much, and might gain"

Success in business comes from repeat customers, who boast about your product and service and bring friends with them.

MOSTER© is based on Dr. Noriaki Kano's state of the art model for understanding relationship between Performance and Satisfaction*.

It is a system that not only measures current satisfaction levels but systematically plans for Delighting the customers.

MOSTER© reveals the complex relationship between the different attributes used to measure customer satisfaction and offers unique features that provide likely impact of Marginal improvements on these attributes.

Thus it supports the decision maker in choosing priority action areas as an optimal solution for delight generation and resources mobilization.

The model helps in predicting customer behavior in the perspective of the relationship between satisfaction and needs fulfillment.

MOSTER© complements the current CSM studies by adding extra dimensions and insights that render the results more actionable. PARC is proud to bring it to this region and aims to make *MOSTER*© a standard feature in the CSM studies for all sectors.

*Thanks to the work of Dr. Noriaki Kano, Tokyo University.

Customer Satisfaction is necessary, but not sufficient
It is... Customer Delight we should aim for.

Media Research

PARC’s media research helps the client to understand better the audience and elaborate strategic solutions to improve message delivery and effective use for media plans. PARC offers a comprehensive perspective of the entire Media Landscape in GCC & Levant Countries

Our syndicated studies related to media include:

- Continuous TV Ratings Surveys
- National Television and Radio Audience Measurement
- National Readership Surveys
- Print Media Circulation Audits
- Content Analysis Surveys
- Reading & Noting Surveys
- Title Readership Profiles

Sample (Typical):
- National
- All governorates of the country, in 3 strata: urban, sub-urban, and rural.

Sampling Method:
- Stratified Multi-Stage random probability sampling technique

Survey Method
- Combined multiple exposures of the same target group members through different media
- Personal face-to-face interviews with adults 15 years and over
- Verification on a sub-sample through a back-check procedure

Our Multimedia surveys help generate Print media, Television, Radio, Cinema and outdoor media reports and study audience multi-channel exposure patterns.

The Database is hosted into

- **SEAS©** is the industry's leading Media Analysis and Planning Software model
- **Qrystar©** TV and Radio analysis and planning software, offering unique and most incisive analytical insights into Television and radio data.

Our several syndicated studies related to TV, radio, print and outdoor media help clients to design and refine strategic solutions, to improve their target group analysis and to deliver highly effective media plans.

NRS: National Readership Surveys

The survey provides comprehensive readership measurements for over titles: 200 newspapers, weekly and monthly magazines.

The survey utilizes a multi-stage probability sampling through face-to-face interviews. Interviews are carried out with individual respondents at their place of residence, adult males and females aged 15 years and above, of all socio-economic segments. Results are weighted to represent the current adult population structure of the respective country.

The results are analyzed in the form of statistical tables by major socio-economic factors such as age, gender, family structure, family income, occupation, area and other variables, and by day of the week.

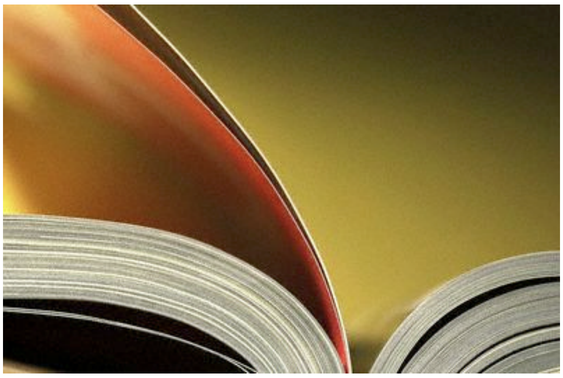
Objectives of the survey:

Daily Newspapers

- Frequency of reading daily newspapers
- Total Issue Readership: Newspapers titles read in past 30 days
- Average Issue Readership
  - Newspapers titles read in an average day of the week
- Reading patterns of individual titles:
  - Frequency of reading
  - Recency of last issue read
  - Source of copy read
  - Place of reading
  - Number of pass-along readers
  - Main Newspaper
  - Topics usually read in newspapers

Weekly and Monthly Magazines

- Frequency of reading Weekly & Monthly Magazines
- Total Issue Readership: Magazines titles read in past 6 months
- Average Issue Readership: Magazines titles read in the publication's cycle:
- Seven days and 30 days respectively
- Reading patterns of magazines:
  - Frequency of reading
  - Recency of last issue read



  - Source of copy read
  - Place of reading
  - Number of reading sessions
- Number of pass-along readers

Media Cross-over

Basic Television & Radio Exposure Indices

- Frequency of watching TV by Day-Parts
- Type of TV broadcast accessed at home
- Frequency of listening to Radio by Day-Parts

Lifestyle & Internet

- Ownership of a range of Household Appliances and Car ownership
- Frequency and Place of using internet

Data & Software

Fully processed data is available in statistical tabulations hosted in the PARC Index Software. All data elements are accessible and can be used for Media Planning.

- PARC MEDIA INDEX: a software provided by PARC to read the statistical report.

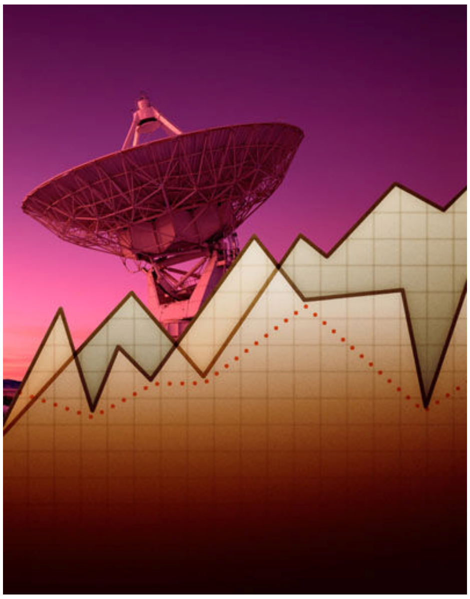
- PARC SEAS©: The all new version of SEAS, Industry standard media evaluation and planning software based on the power and flexibility of Objects Technology; delivering a powerful yet user-friendly workbench for in-depth media analyses, planning and schedule optimization.

Continuous TV Ratings Surveys

PARC's KSA National TV Audience Tracking, a Nationwide Survey of the adult population 15 years and over, Saudi Nationals and Arab Expatriates in Saudi Arabia.

Coverage

Nationwide coverage including the Urban, Sub-Urban and Rural areas of the Kingdom



Survey Cycle

Continuous survey spreading on 28 days, continuous 4 weeks polling and reporting on 5th week

Sample Size

The sample has been assigned at (n = 3000) per month initially with prospect to increase further upon subscribers demand

Sample Design

The sample has been designed to represent the Arab adult population of Saudi Arabia taking into consideration the results of the latest population census, and the distributions by ethnic group and basic demographic indicators.

Research Model

All learnings cumulated through the different industry research programs previously conducted in KSA and the GCC at large have been carefully evaluated and a comprehensive research model has been designed using the PARC basic vehicle.

The research model has been carefully tested and validated to represent with a high degree of accuracy the actual TV viewing of the General Public in the typical socio-cultural environment of Saudi Arabia and the GCC countries.

Research Methodology

The survey is conducted using CATI from the PARC Call Center in Jeddah, by Saudi and Arab Female operators.

Operation

A very advanced CATI system is adopted hosting the following features:

- Database security
- Secure auto dialing, with call status reports and sample handling protocol, and appointment management
- Comprehensive on-line production statistics
- Real-time listening and monitoring
- Integral voice recording for all interview conversations between operators and respondents

Comprehensive International Media Research audit protocols are implemented. A third party, independent auditor performs audit checks:

- On-site observation and testing
- Listening to daily recordings and verification of data records
- Rigorous control of telephone database and progressive sample completion by profile

Questionnaire

The questionnaire goes through extensive design and testing phases. After initial design by the PARC team, it was discussed with and revised in collaboration with International TV Research specialists who approved the questionnaire.

Standards of Performance

The survey process applied and the instruments used shall comply with the International standards for Television Audience Research, and in particular PARC shall maintain the standard requirements for transparency, auditing and certification of its research at all times.

Auditing Compliance

PARC pledges that it shall comply with the International Media Research Auditing Standards from CESP and shall submit to Client-Sponsored-Audits

Audits Protocol - VAP

Strict controls are maintained on the Veracity and Accuracy of the data, and Performance of the survey system.

Veracity

- On-site audit supervision of operators
- Auto-dialing checks
- On-line listening and viewing of data capture

Accuracy

- Integrity of all interview recordings
- Accuracy of data entry vs. respondent answers
- Administration of omissions and mode of questions
- Script Accuracy

Performance

- Telephone database sampling status report
- Sample completion against pre-set quota profiles
- Compilation of weights and end factors

Deliverables

Fully tabulated statistical report by Socio-Economic Profiles, Day of week, and other characteristics of audience analysis

- Cumulative rolling database with analytical capabilities hosted in PARC Index©
- The full audited and weighted database is available to subscribers under a special protocol to run on the software of their choice or in SEAS format
- The data is delivered one week from the end of each wave

National TV Audience Tracking has been extended to cover United Arab Emirates, Kuwait and Egypt.

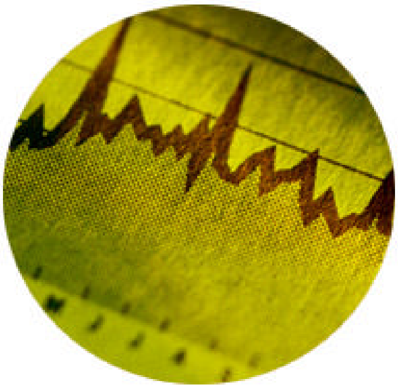
SEAS©: Dynamic Media Planning & Analysis System

SEAS is a specialized application software that can handle a large variety of audience databases of audio visual and print media exposure Behavior and performs comprehensive media Planning & schedule Optimization and Post-Evaluation analysis needs.

SEAS 4.0 all new design prides to ensure that our clients will have nothing but the best. The system is an integrated, multi-purpose analysis and planning tool, with an entirely new working environment harnessing the power and features offered by the contemporary IT computing technologies.

SEAS 4.0 applied science for intelligent audio visual and print media campaign planning, optimizing and buying. It assists the User in selecting the best opportunities of *advertising space(s)* available or in forecasting the ratings of future offers.

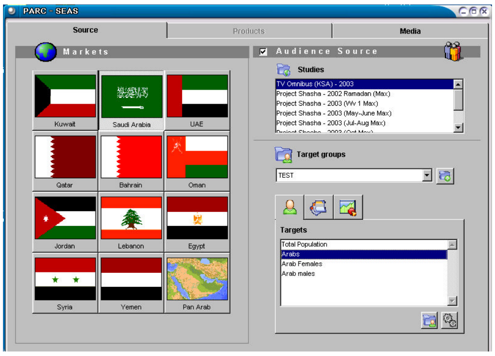
SEAS reflects our planning know how, acquired over the last 30 years, through discussions held with users and media experts on what they perceive to be a cutting edge planning tool.



The new SEAS can work with any survey data source: Media exposure and tracking surveys, audio visual diary, Continuous telemetric data sources (People or set TV Meters services) and can automatically switch between factual and probability simulation models. The simulation model helps to predict automatically, the estimated ratings of advertising opportunities anticipated in the future.

The Planning Module is built around a model that facilitates to quickly build plans that will best meet the client's needs. It allows the user to freely move between Planning/Optimization, audience Behavior and Post Evaluation modules.

Intuitive User Interface



SEAS now includes a refreshed intuitive interface and several new features that make it easier than ever to analyze target profiles and evaluate schedules.

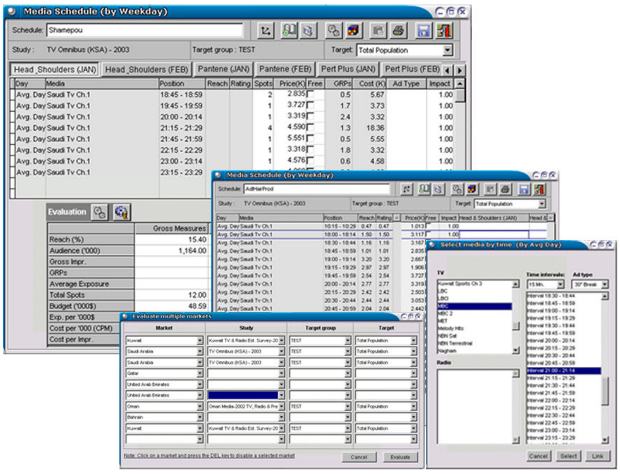
Unique features

Programs or Dayparts – SEAS provide the facility to plan campaigns based on either program audience measures or daypart ratings. The analysis can be varied by choice of time period for past data and can be forecast forward to a future time. A variety of measures are available against each program such as reach, share, average rating, average time spent, loyalty and an index of total audience against the primary audience. Other features include, averaging of data, sorting, graphing, exporting, reach and frequency distributions.

Typology Ratings - Alternatively, ratings can be produced by program genre, enabling media planning and optimization features to use program genres and typology rather than specific programs.

The media planning component of SEAS can handle with ease and versatility multiple schedules on multiple Targets within multiple markets simultaneously.

Optimization



SEAS includes an optimization engine that will seek out your target group no matter what time or what station they are viewing. The model selects the most cost-effective spots while trying to maximize reach, iterating until the assigned objectives are fulfilled: the requested **coverage** and preferred frequency of exposure are attained or the specified **budget** is exhausted.

Media Planning Component

Seamless integration with Spiral allows SEAS to perform a host of Post-Evaluation functions. The actual campaign can be recreated and modified in SEAS by eliminating spots or by retrieving new ones from the database, specifying the channel, day and time band of broadcast. The final result is a “simulated” campaign, which can be used for negotiation, analysis or planning purposes.

SEAS can also help in “What-if” Simulation exercises where the user can recreate the original campaign or modify an existing campaign.

Powerful Analytical Tools

Easy competition or comparison analysis can be generated at any time to examine the dynamic evolution of audience flow down to a quarter hour or even further down to a minute-by-minute basis, of ratings and share for different channels, different days or different targets.

- Effectively represent the distribution of viewers for selected events or parts of the day.
- Evaluate the performance of programs based on cumulated reach and frequency of viewing.
- Time Intervals - User can define any time intervals split from 1 minute to 24 hours

Flexible and Powerful Reporting

The flexible "magic grid" allows the User to fully customize the report layout and save jobs/layouts to speed up analysis and the reporting process.

Interactive, cross-tabulated Summary Reports are available to easily monitor all Planning Objectives and constraints (GRP, OTS, Reach, Effective Reach, Budget etc)

Reach and Frequency Analysis

SEAS gives you a Program grid with the look and feel of an FPC (Fixed Point Chart). The grid displays ratings, spot price and related information with different colors identifying distinct program types.

Ratings are displayed graphically for each station as well as Total television, over 24 hours of the day.

For each campaign (Regular or Optimized), SEAS delivers:

- Reach & Frequency Report – shows the Reach & Frequency distribution for each frequency level.
- Frequency Distribution Table – an integrated table showing the effective reach at different levels of frequency.
- GRP's
- Budget
- Impact weighted results
- Profile Report – shows how the impact of the campaign was distributed within the selected target group.
- Summaries
- Spot by Spot progressive build-up of frequency measures of the campaign.
- Type of Day – A breakdown of campaign results by days of the week, and delivers sub-totals for weekdays and weekends.
- Station & Time Bands – Indicates which day parts were used by each channel for the campaign and the distribution of the spots between them.
- Program by Station – shows the breakdown of results by channels and their programs.

The Query engine of SEAS

Qrystar is a very powerful query engine ported by SEAS to analyze the programming mix of any number of TV & Radio Stations. Analyses can be performed for stations across the entire region. Qrystar empowers the user to concentrate on the analysis of the station offerings, the corresponding advertising expenditure and the audience for these programs (when available). Information is gathered from a variety of sources and presented in a simple, intuitive and easy to use form.

Qrystar Feature List

- In-depth and detailed Single Station Analysis across time. Perform daily, weekly or monthly analysis of all programs available on the station, with audience profiles, affinity targets and viewing interests.
- Competitive Multi-Station Analysis: Time period analysis of competing stations based on program typology, reach & ad-spend.
- Programs Analysis: By typology, by episode and day-parts incorporating ratings and ad-spend. Find out the spread, max./min./avg. of rating and spend for any program.
- Top Rated Programs: Find the top programs for a single station and across several stations for any given day, week or month. Criteria can be based on ratings & spend.
- Audience Profile: Study the target audience profile for any program. Profile includes the ratings for all the pre-defined and customized target audience definitions.
- Audience Behaviour: Get a detailed view of the audience viewing-behaviour for any day. Compare several days or several stations by time period for Reach (%).
- Brand Strategy Analysis: Query the software for program names and / or program genres where specific brands are advertising. Probe deep into the placement strategy of competing brands.
- Media-Buying Tool: Use the Station Grid as an effective media-buying tool. With a single click, generate single station and multi-station program grids with the ratings and ad-spends.
- It offers many ways to produce attractive and easy to read graphs quickly, using simple and intuitive user interfaces. It can plot an interactive time versus reach/share (%) graph of a single day for multiple stations, and updates program names dynamically as you inspect the graph.
- The dynamic nature of Qrystar allows seamless rotation of data sets across different output modes thus allowing you to explore in detail and also summarize your data readily.

Qrystar is certainly unique; no other software presents any such combination of insightful features and powerful analysis tools like Qrystar. TV Schedules are endlessly dissected and knowledge is gained at the most intimate level of detail of TV programming and advertising placement. Qrystar is the most intelligent query engine complement to SEAS and Spiral Suite of application products.

Advertising Monitoring Services

PARC is Middle East's most trusted monitoring service for broadcast TV, radio, print, cinema and outdoor media. Our products and services are invaluable tools for advertising agencies, account planners, media houses, auditors and marketers. We offer the most comprehensive and in-depth coverage in the 13 media markets covering GCC, Pan Arab media, the Pan ArAsian media and Levant media.

PARC monitors a comprehensive list of Television, Radio, Cinema, Newspapers, Magazines, and Billboards across the region using our wide network of 10 fully equipped offices. This network translates into coverage from over:

- newspapers (daily and weekly),
- magazines (weekly, monthly and seasonal),
- radio and
- television stations.

PARC's 400 full time researchers, research executives, analysts, programmers, translators, and marketing team members have commendable experience in the field of monitoring & research.

PARC established in 1976 invaluable archives consisting of actual clips (tvc's and press scans), monitoring notes, summary notes and transcripts. Nowadays we can search for and locate material monitored across the PARC network that was aired anytime during the past 5 year's period and ensure timely delivery of the information to you.

Our breadth of services saves you the burden of data collection entry, plus the time-consuming chore of printing, inserting, collating, labeling, and analyzing. PARC efficiency means real cost savings to you, while our commitment to quality service and accuracy means professional work.

Why use PARC's Monitoring Service?

Our monitoring service turns piles of press cuttings, television and radio tapes into clear and concise management information. The reasons for subscribing to PARC's monitoring services are numerous. We will list the most important ones below:

- To track message delivery accurately and timely
- To compare and measure regional performance of media vehicles
- To get timely information about breaking competitive creatives
- To fine-tune the targeting of advertising and PR campaigns
- To prove success to the Client
- To evaluate agencies' creative performance
- To improve the effectiveness of your campaigning measures.

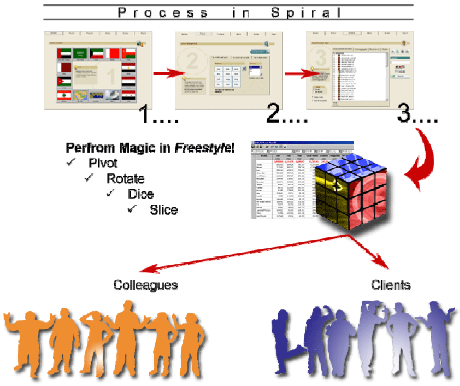
Spiral©: Comprehensive Advertising Monitoring & Analysis System

When the advertising efforts to be analyzed span across 13 Arab markets and hundreds of media vehicles, including television, newspapers, magazines, outdoor, radio and cinema, a highly flexible, powerful and fast tool is required to analyze it in real-time.

A fundamental change... Spiral-Freestyle

Most improvements in technology have only a marginal effect on the way we operate, but once in a while a new technology creates a fundamental change. We believe **Spiral-Freestyle** to be just that.

Freestyle enables you to process volumes of data, pack into a ‘magic cube’ and toss it over to your colleagues or clients to explore. While Spiral allows you to control the construction of what gets delivered in the ‘magic cube’, Freestyle greatly enhances the usability of the data for you and your clients.



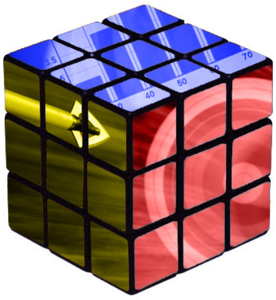
Freestyle uses On-Line Analytical Processing, a method of multi-dimensional analysis of data that allows users to "slice and dice" data to create the information they need.

Freestyle empowers you and your clients to interactively explore information, to build insightful, multi-dimensional reports, and to facilitate good decisions while giving you control over access to the underlying data sources.

It provides a branded, personalized end-user experience with a non-existent learning curve.

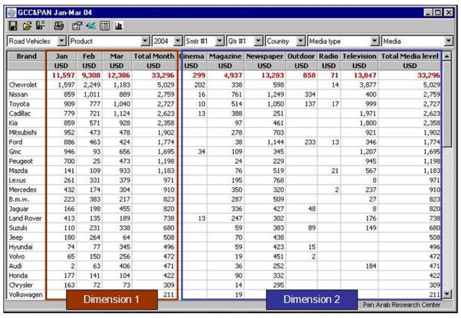
Multi-dimensional.... freedom to create

The **cube** and its accompanying imbedded reports are sent to the user (client or colleagues) where they explore and analyze the data, to discover key insights to support their business decisions. As they explore, they enjoy the **freedom** to create additional reports simply by twisting the cube around. Freestyle delivers comprehensive reporting capabilities to users of all skill levels.



Freestyle’s multi-dimensional cube provides a framework to organize data in a model that resembles your understanding of the business. This enables you to understand, navigate and convert the information easily and more intuitively than you can with flat information structures. *The cube, thus hosts info in the most comprehensive way and becomes a self contained solution.*

Freestyle is ideally suited to handle complex, cross-dimensional calculations, which are vital to the users who rely on derived data and secondary analysis. This allows for storage of pre-calculated data at numerous granular and hierarchical intersections, ensuring quick query response times. *The cube enables you to unfold these dimensions and consult the data in any cut you want.*



GCC&PAN Jan-Mar 04

Road Vehicles | Product | 2004 | Smtr #1 | Qtr #1 | Country | Media type | Media

Brand	Jan	Feb	Mar	Total Month	Cinema	Magazine	Newspaper	Outdoor	Radio	Television	Total Media level
	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD
	11,597	9,308	12,386	33,296	299	4,937	13,283	858	71	13,847	33,296
Chevrolet	1,597	2,249	1,183	5,029	202	338	598		14	3,877	5,029
Nissan	859	1,011	889	2,759	16	761	1,249	334		400	2,759
Toyota	909	777	1,040	2,727	10	514	1,050	137	17	999	2,727
Cadillac	779	721	1,124	2,623	13	388	251			1,971	2,623
Kia	859	571	928	2,358		97	461			1,800	2,358
Mitsubishi	952	473	478	1,902		278	703			921	1,902
Ford	886	463	424	1,774		38	1,144	233	13	346	1,774
Gmc	946	93	656	1,695	34	109	345			1,207	1,695
Peugeot	700	25	473	1,198		24	229			945	1,198
Mazda	141	109	933	1,183		76	519		21	567	1,183
Lexus	261	331	379	971		195	768			8	971
Mercedes	432	174	304	910		350	320		2	237	910
B.m.w.	223	383	217	823		287	509			27	823
Jaguar	166	198	455	820		336	427	48		8	820
Land Rover	413	135	189	738	13	247	302			176	738
Suzuki	110	231	338	680		59	383	89		149	680
Jeep	180	264	64	508		70	438				508
Hyundai	74	77	345	496		59	423	15			496
Volvo	65	150	256	472		19	451	2			472
Audi	2	63	406	471		36	252			184	471
Honda	177	141	104	422		90	332				422
Chrysler	163	72	73	309		14	295				309
Volkswagen				211		19					211

Using Freestyle allows you to rapidly analyze trends and correlations pertinent to ad-spend operations. This understanding enables you to adapt strategies and processes quickly and frequently. *Time series analysis of progressive statements and presentation of information in a continuum have never been so intuitive and engaging.*

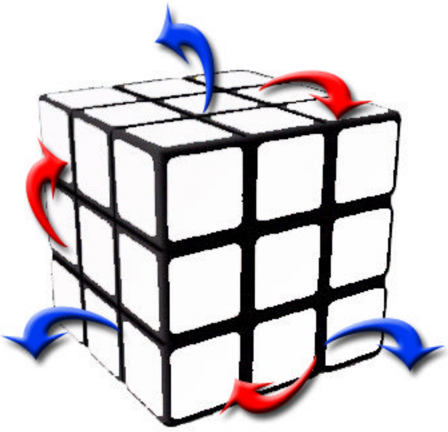
Hence it is truly a **MDCI** – a multi dimensional cube of information.

Magic? .... Simply Freestyle

The technology of tomorrow that masters data packing leaving behind the flat surfaces…

Freestyle's data structure and enhanced viewing capabilities allow users to interact with and view information from a number of **perspectives** and aggregations with minimal computing expertise.

A whole new workspace…



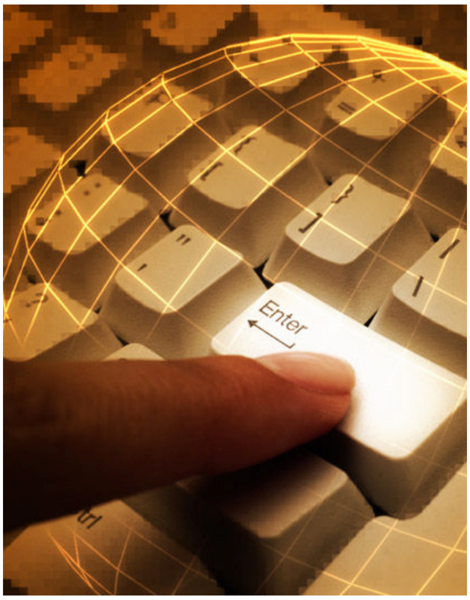
With Freestyle's simple and intuitive interface, skilled analysts and non-technical users alike can interact with the **presentation** of the data, iteratively changing the dimensions, measures, nesting and groupings of data as important business insights get discovered.

The intuitiveness of the interface combined with the breadth of capabilities is what gives users the **freedom** they need to do their job effectively.

Freestyle now offers the ability to:

- Add new measures to appear on your report
- Save Report Layouts
- Add 'personalized' titles to reports and graphs
- Export to spreadsheet etc.
- And more…

Weblog©: Proactive Competitive Intelligence System



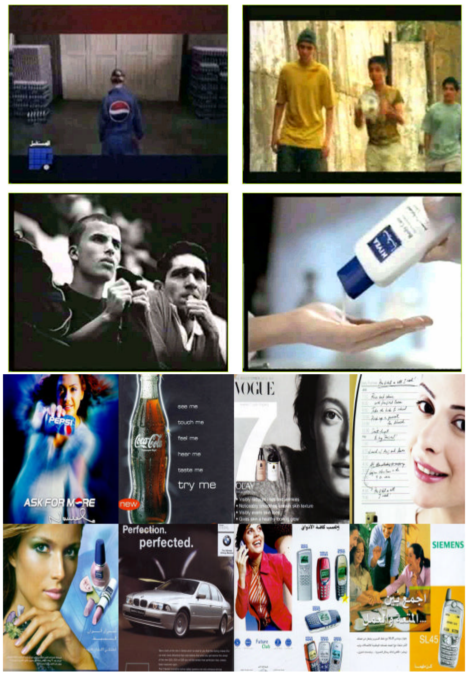
Weblog is aimed at improving the access to the vast multi-market data provided by PARC advertising monitoring services. Weblog combines the power of the internet, timely delivery, ease and user-friendliness of the Windows environment to provide proactive competitive intelligence, right into the hands of Media managers, Account Planners, Client Servicing personnel etc.

Weblog is a giant leap ahead from the days of both Ad Logs and Daily alerts. It not only radically simplifies the process of analyzing large-scale advertising and media data but also allows you to define alerts and observation posts in advance, which monitor your competitor's activity on your behalf.

Main Features of Weblog:

- Easy accessibility of daily logs through the internet
- Speed of delivery
- Intuitive and user-friendly design
- Daily reports for both Print & TV by brand, product and media (for TV and for Press).
- Ability to define your own Competitor's Bouquet comprised of frequently advertised Brands or Products, for instant notification of any activity within these.
- Weblog reports breaks news on new creatives and allows both viewing and saving of the artworks / creative for both Press & TV, right from the desktop. The new creatives are optimized for web-delivery and thus take negligible time to fetch.
- Single Click Export to Excel
- Easy importing of Creatives to presentations and much more…

Story©: Comprehensive Qualitative Monitoring Analysis System



Story is a comprehensive analysis system for creative works comprised of advertising copy viewer, browser and analysis applications for the windows environment. With Story you can efficiently search, browse through and analyze Ad-clippings for Television & Print. You can produce the selected ads on CD with a host of intelligent features and capabilities that are well appreciated by creatives and planners in the agency.

All new ads find their place inside your computer and constitute an impressive library that can be consulted anytime, by anyone in the organization. Story is the software that makes the audiovisual information come to life and directly usable by your staff across all departments. **Story** provides a user-friendly interface to view the ad-creatives efficiently and intelligently

Main Features of Story:

- **Build an in-house large scale Qualitative database:** Ad Clips stored at a central storage location (for eg. Server) allows access to any number of staff members across the organization.

- **Intelligent Keyword Search:** Filter the result using wildcard search. The user can search for any word appearing anywhere in the resultant grid, for example **"kellogs", "father", "mitsubishi"** etc. Story offers Asymptotic Filter Mechanism.

- **Elaborate Content Search:** Each Ad is full-text indexed making it possible to search for contextual info appearing in the clipping (Television clipping) say for example display all the creatives where a "**rose**" is shown. Or search for all ads where the following keywords have been used: 100%, Pure cream, Children, Kitchen, Instrumental music, Breakfast etc.

- **Preview Ads:** The ad (MPG, JPEG) can be viewed by double clicking on the ad-creative.

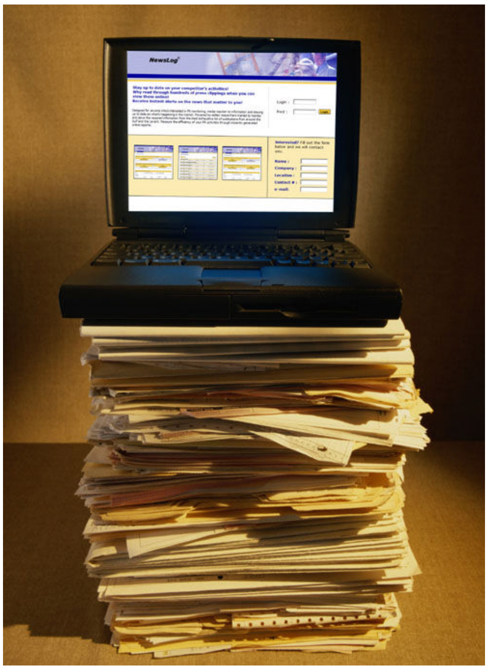
- **Export:** The result that appears on the grid can be exported to:
  - an Excel sheet for Quantitative Reporting.
  - a browser without the ad-creative for internal distribution within the organization
  - a browser along with the ad-creative for Qualitative Reporting to the client distribution

- **View from CD:** An option to view the data and perform all the above tasks directly from CD.

Story is not a program to view ads stacked in a PC, but a comprehensive full scale audio visual library management and distribution system to accept, store, manage with the power of intelligent extended information integrated in the audio visual records to answer needs of the most demanding creative and strategy planners.

Newslog©: Premium News and PR Monitoring Service

The Challenge



With advertising and news media being so diversified in current times, enormous man and money resources need to be expended to track everything that public media report about your specific industry, company, brand, products, services and those of your competitors within your own geography.

We **log** every piece of **news** relevant to your business and your competition. We classify, code, process and report it, as it happens, intelligently.

The Solution

Newslog® is a premium Media and PR monitoring service in the Arab world, from Pan Arab Research Center, offering you this pertinent news data in an organized mode, at a mere click of a button.

The Most Comprehensive Media Coverage

Every day we monitor and clip news stories from (112) Television Channels, (40) Radio Stations and (1300+) carefully-selected publications, including virtually all newspapers, magazines and trade journals across (11) markets in Middle East region and Pan Arab media.

As new media vehicles appear on the market, we update our list of daily monitored media to ensure comprehensiveness.

Intelligent Monitoring

Our sophisticated monitoring system delivers News Releases, Articles, Features, Product Reviews, Editorials and more right to your desktop. The Easy-access to this sea of information, frees up your staff to focus on more important tasks such as analyzing, and measuring the effectiveness of your communication and subsequently strategizing and implementing.

24/7 News Monitoring
PARC monitors 1400+ media vehicles all across the Gulf and Levant to bring to you the latest information.

World Class Servers
The service is available through a fast web based system and also as email alerts.

Intelligent Reporting
Clients can set up individualised and specific searches to track the latest news, commentary, information and analysis.

Distribution Network
Easy distribution of information to key personnel within an organization using an easily configurable online system.

Customized Search

Newslog® breathes further intelligence by classifying the monitored data into a four-tier hierarchical categorization scheme. This allows you to perform search using varied criteria ranging from Group, Product, Brand, Sub-Brand, Media type(s), Media Title(s), Time period, Language to User-defined Keywords.

Anytime, Anywhere Clip Access & Management

Newslog® provides anytime, anywhere Online access to your clips by those you have authorized, enabling them to disseminate information further to one or more recipients. The Digital storage capabilities offer an edge over the traditional paper based storage, allowing faster, better data mining.

- Any number of clips/articles can be printed using your own branding (logo etc.) with a single click, for a customized look and feel.
- It also allows you to export your data to other industry standard formats like MS-Excel® and Adobe® Acrobat®.

Timely Delivery

You can choose from a variety of Newslog® delivery options like:

- Automated alerts with headline and classification details such as country, date, media are delivered via ***Daily-emails***. Each alert is complemented with the Hyperlink to actual article, allowing you to gain early insight to enable timely action.
- ***Online access*** to your own news requirements via the Internet on a password-protected ***website*** enables you to smoothly review, search, analyze and circulate your clips.
- All clips for a month are consolidated to facilitate multi-printing and to serve as back-up, delivered on a ***CDROM*** upon request.
- ***Quantitative & Qualitative Reports*** are also available.

Evaluation and Analysis Services

Newslog® boasts of unmatched ***Media Measurement***, thanks to PARC's most detailed Audience Research data. This allows better measurement of key performance indicators of PR success including Reach and trends.

Introductory Level Analysis

- Provides you with basic information that captures the frequency of your media exposure
- View your media exposure in easy to understand graphs.
- Segment the data geographically or by media type and drill down to see the media outlet and audience reach.
- View trends for up to 12 months, print reports or capture the data and export to Excel.

Enhanced Level Analysis

- Allows you to measure the value of your communications efforts, by assigning an equivalent ad value rate to your media coverage, reflecting the cost of comparable paid advertising.
- Provides you with the ability to break down your media exposure by products, topics or key messages.
- See a timeline of your media coverage following each press release.
- Analyze your competitors' media exposure.

Favorability Analysis

- Provides an evaluation of the overall favorability your media coverage received.
- Analyze the tone of your media coverage and the percentage of relevant exposure.
- Assess the strengths and weaknesses in regional exposure or media type, allowing you to better focus your PR campaigns.
- Study change in sentiments that may occur over time or as a result of campaign redirection.

Customer Service & Training

Orientation sessions and training on use of website for information access, report generation and analysis, is provided to all subscribers. As our privileged client you will have access to expert assistance for monitoring emergencies or PR crisis.

We would be delighted to demonstrate *Newslog*® to you and your colleagues. Please call your nearest PARC office to schedule an appointment.

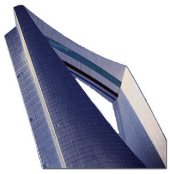
Target Group Index

TGI (Target Group Index) is a Single-Source consumer market and media research survey, providing invaluable data from large samples of Adult population, 15 years and above, across the counties surveyed. Respondents are asked not only about their products and brands usage, but also about their leisure activities, their use of services, their media exposure and preferences, their attitudes and motivations and of course demographics.

This means that the data available to you is extremely broad and flexible, presenting virtually endless opportunities for market analysis and segmentation and helping you develop your targeting and consumer understanding.

TGI Regional Coverage

Market	Sample Size
United Arab Emirates	5000
Saudi Arabia	7000
Kuwait	4000
Lebanon	4000
Egypt	5000

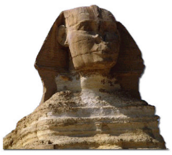


Saudi Arabia

U.A.E.

Kuwait

Lebanon



Egypt

TGI deliverables

TGI delivers the following, making it a truly Single Source survey:

Demographics
- Comprehensive Socio-Economic profile data

Psycho-graphics
- Lifestyles
- Attitudes

Product and Brand Usage
Respondents are asked about their use of 4000+ brands in over 200 product areas. Broad categories of products and activity coverage include:

- Food
- Household Products
- Toiletries & Cosmetics
- Pharmaceutical & Chemist Products
- Drinks
- Sweet & Salty Snacks
- Tobacco Products
- Motoring
- Shopping, Retail & Clothing
- Sports & Leisure
- Holidays & Travel
- Financial Services
- Communications & Internet
- Appliances & other Household Durables
- Electronics & other Personal Items

Time Diary

- Daily Activities reconstruction using a comprehensive time diary

Media Exposure

- Media Consumption: Print media, TV, Radio, Cinema, Internet and Outdoor
- Frequency, Recency and Intensity of reading Daily Newspapers, Weekly & Monthly magazines by Publication title & Topics of Interest for Press
- Frequency, Recency and Intensity of viewing TV and Radio listening by time segments
- Recall of outdoor advertising by type

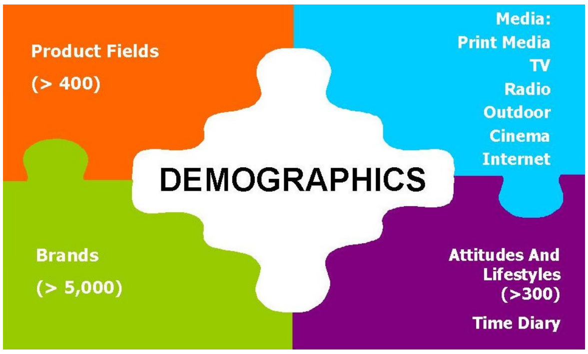
Powerful analysis software

A central element of the TGI proposition is a specially developed suite of analysis software. This enables subscribers to conduct powerful analyses for themselves, ranging from simple cross-tabulations to complex multivariate segmentations of readers according to factors of relevance. Whatever the situational analysis required, the software provides fast and flexible access to the data.

TGI solutions

TGI goes beyond simply providing data. TGI can provide you with the answers to all types of marketing questions, quickly and flexibly.

TGI can provide you with a simple market overview or a more detailed analysis of the competitive environment, right through to segmentation.



Market Overview

Objective: Essential market insights to help expand into a new category or territory

- Evaluate the opportunities for expanding your brand into new markets
- Facilitate market evaluation - gain a broad understanding of market dynamics and your potential customers
- Gain insight on your potential new customers
- Begin to develop your marketing strategy through knowing:
  - The size of the market
  - The demographic profiles
  - The trends over time
  - Who the leading players are

User Profiles

Objective: A better understanding of existing and potential customers

- Engage your customers on a more personal level
- Ensure the personality of your brand correlates with the lifestyles of its users
- Tap into your customers' interests - understand their favourite newspaper sections, music, films and TV programmes
- Develop marketing strategies that are relevant to your consumers - get to grips with what motivates them
- Identify the best sponsorship opportunities that exist for your target audience
- Get the complete picture on your customers' lives and attitudes

Brand Scenario

Objective: Learn about the key brands driving the category, in terms of users and positioning

- Gain an overview of the brand landscape to help steer your marketing strategies
- Evaluate which consumer groups offer the best opportunities
- Predict what might happen in the future - appreciate how brands have performed over time
- Understand the motivations behind brand choice - identify the key attitudinal themes that differentiate brand users

The Competitive Environment

Objective: Understand more about the interrelation between competing brands within the category

- Uncover the opportunities to exploit, and the threats to defend
- Refine your approach - identify the key differences and similarities between competing brands
- Predict what might happen in the future - understand how the category and brands have fared over time to create the current market conditions
- Gain a comprehensive overview of the competitive environment to help steer your marketing strategies

Key Drivers

Objective: Recognise what motivates consumers in your target group, and makes them choose one brand over the competitive set

- Understand your existing and potential customers' behaviour based on their fundamental priorities in life
- Identify the key factors that drive consumers to choose one brand over the competitive set
- Reveal synergies between your brand and the attitudes of its users
- Develop marketing strategies that tap in to your customers' core interests and values

Relationship Dynamics

Objective: Identify what characterises your target group, and spot suitable sponsorship and promotional opportunities

- Search across all categories in order to identify the optimal sponsorship and promotional opportunities
- Pick out the top relationships for your brand without bias from user input or selection
- Understand the key dynamics within a target audience's broader lifestyle repertoire
- Improve strategic planning for a brand

Pan Arab Research Center

PARC's ADVERTISING MARKETS PREVIEW - Y2007

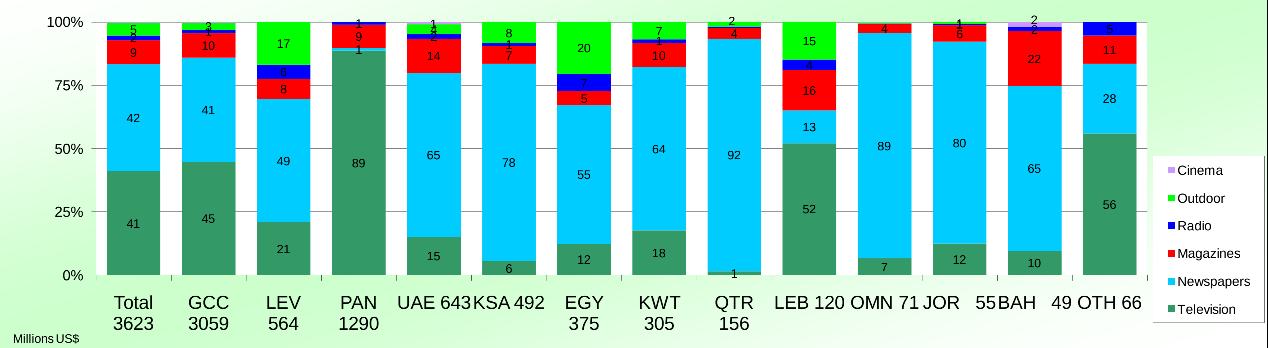
ADVERTISING MARKETS (Jan-June) Y2007

Millions US$ 3623 ▲ + 20%

1- Markets Ranking & Media Contribution (US $ Millions)

Rank	Market Name & Abbreviation		Y2005	Y2006	Y2007	%Var'n Y07/06	Media Contribution (US $ Million) Television	Newspapers	Magazines	Radio	Outdoor	Cinema
1	Pan Arab Media	PAN	787	1,005	1,290	28	1,145	14	119	12	0	0
2	United Arab Emirates	UAE	435	470	643	37	97	416	88	11	25	6
3	Kindom Of Saudi Arabia	KSA	448	483	492	2	27	384	34	6	41	0
4	Egypt	EGY	231	347	375	8	47	205	21	26	77	0
5	Kuwait	KWT	210	251	305	21	54	197	29	4	21	0
6	Qatar	QTR	63	103	156	52	2	143	7	1	3	0
7	Lebanon	LEB	113	130	120	-7	63	16	19	5	18	0
8	Oman	OMN	44	65	71	9	5	63	2	0	0	0
9	Jordan	JOR	45	51	55	9	7	44	4	0	0	0
10	Bahrain	BAH	52	52	49	-6	5	32	11	1	0	1
11	Other Markets**	OTH	27	59	66	11	37	18	7	4	0	0
	Total AGCC & Pan Arab	**GCC**	**2,055**	**2,472**	**3,059**	**24**	**1,370**	**1,258**	**296**	**38**	**90**	**7**
	Total Levant Markets	**LEV**	**400**	**545**	**564**	**3**	**118**	**274**	**46**	**31**	**95**	**0**
	Total All Markets	**M$**	**2,455**	**3,017**	**3,623**	**20**	**1,488**	**1,532**	**342**	**69**	**185**	**7**

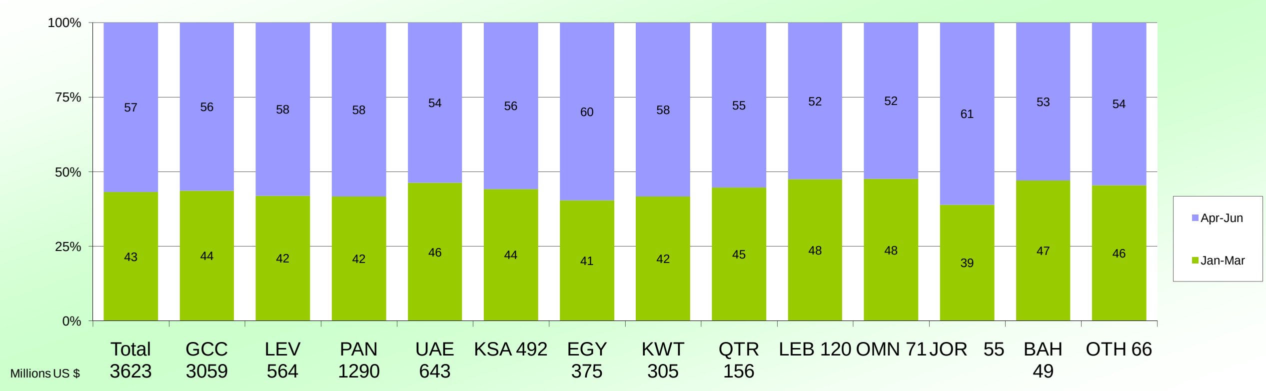
			i%		**i%**		**i%**		**i%**		**i%**		**i%**	**i%**
Markets Growth Index (Base Y2005)	**Y2005**	2,455	100	955	100	1,098	100	268	100	44	100	84	100	6	100
	Y2006	3,017	123	1,211	127	1,306	119	314	117	68	156	111	133	7	116
	Y2007	3,623	148	1,488	156	1,532	139	342	128	69	158	185	220	7	120



Ranking of Markets & Media Split

2 - Markets Adspend by Quarter Y2007 (US $ Millions)

Rank	Market Name	Abbreviation	Y2007 Value	Sh%	JAN - MAR Value	Sh%	APR-JUN Value	Sh%
1	Pan Arab Media	PAN	1,290	36	538	42	752	58
2	United Arab Emirates	UAE	643	18	297	46	345	54
3	Kindom Of Saudi Arabia	KSA	492	14	218	44	275	56
4	Egypt	EGY	375	10	152	41	225	60
5	Kuwait	KWT	305	8	127	42	178	58
6	Qatar	QTR	156	4	70	45	86	55
7	Lebanon	LEB	120	3	57	48	63	52
8	Oman	OMN	71	2	34	48	37	52
9	Jordan	JOR	55	2	22	39	34	61
10	Bahrain	BAH	49	1	23	47	26	53
11	Other Markets**	OTH	66	2	30	46	36	54
	Total AGCC & Pan Arab	**GCC**	**3,059**	**84**	**1,331**	**44**	**1,719**	**56**
	Total Levant Markets	**LEV**	**564**	**16**	**237**	**42**	**329**	**58**
	Total All Markets	**M$**	**3,623**	**100**	**1,568**	**43**	**2,057**	**57**
				i%		**i%**		**i%**
	Markets Growth Index (Base Y2005)	**Y2005**	2,455	100	1,119	100	1,336	100
		Y2006	3,017	123	1,331	119	1,686	126
		Y2007	3,623	148	1,568	140	2,057	154



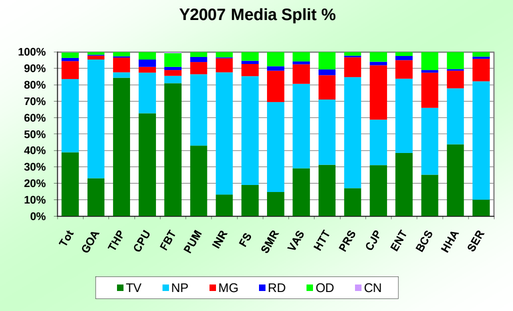
Ranked Markets Ad Spend & Quarterly Split

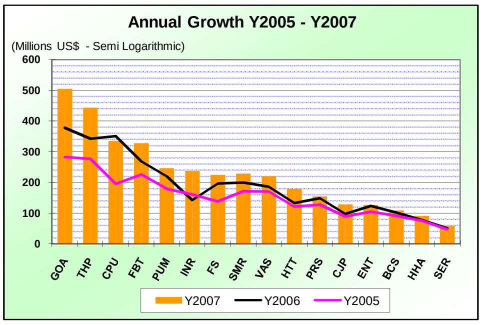
*** Egypt Spend Data reported at current market US Dollar value / *** UAE Outdoor value is Estimated**
**** Other Markets : Combined - Syria, Yemen & Arasian**

AGCC,LEVANT*,PAN ARAB & ARASIAN MEDIA MARKET (Jan-June) Y2007

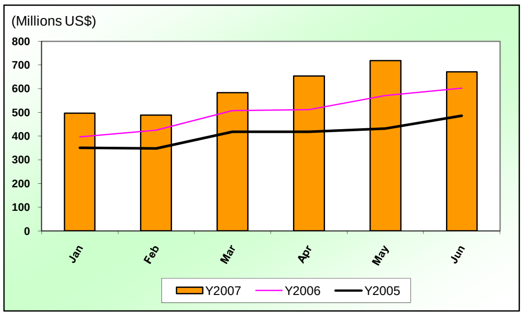
Millions US$ 3623 ▲ + 20%

						%Var'n	Media Split %					
Chapter	**Abbreviation**	**Y2005**	**Y2006**	**Y2007**	**Sh%**	**Y07/06**	**TV**	**NP**	**MG**	**RD**	**OD**	**CN**
Government/Organization Advertising	GOA	282	378	506	14	34	23	73	2	1	2	0
Toiletries Hygiene/ House Care Products	THP	277	342	444	12	30	84	3	9	1	3	*
Communications & Public Utilities	CPU	195	350	336	9	-4	63	25	4	5	4	*
Food Beverages And Tobacco	FBT	225	269	328	9	22	81	4	4	2	8	1
Publishig Media	PUM	179	219	247	7	13	43	43	7	3	3	0
Insurance & Real Estate	INR	161	143	238	7	66	13	75	9	1	3	0
Financial Services	FS	138	196	225	6	15	19	66	8	2	5	0
Shopping Malls & Retail Stores	SMR	171	200	229	6	14	15	55	19	3	9	*
Vehicles,Accessories & Supply	VAS	171	186	220	6	18	29	51	12	2	6	*
Hotel, Travel & Tourism	HTT	121	133	179	5	35	31	40	15	4	11	*
Professional Services	PRS	128	148	155	4	4	17	68	12	1	2	*
Clothing,Jewellery & Personal Acs	CJP	89	98	130	4	32	31	28	33	2	6	*
Entertainment	ENT	105	123	127	3	3	39	45	11	3	2	*
Business/Construct Equip. & Supply	BCS	92	102	110	3	8	25	41	21	2	11	*
Household Appliances	HHA	76	77	92	3	19	44	34	11	1	10	*
Other Services	SER	48	51	58	2	14	10	72	14	1	3	0
Total		**2,455**	**3,017**	**3,623**	**100**	**20**	**39**	**45**	**11**	**2**	**3**	**0**





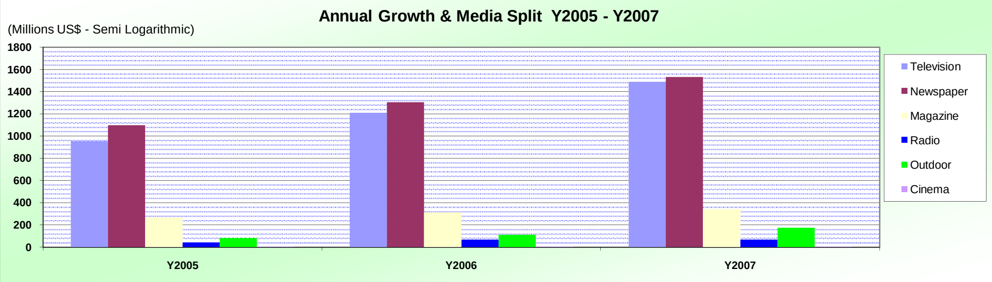
Monthly Spend Analysis (Millions US$)Y2005 - 2007



				Var'n %
Period	**Y2005**	**Y2006**	**Y2007**	**Y07/06**
Jan	351	397	497	25
Feb	349	426	488	15
Mar	419	508	583	15
Apr	418	512	656	28
May	432	571	722	26
Jun	486	602	678	13
Total	**2455**	**3017**	**3623**	**20**

Overall Media Split Analysis (Millions US$)

Media	**Y2005**		**Y2006**		**Y2007**		**Var'n %**	**Growth Index***	
	Value	**Sh%**	**Value**	**Sh%**	**Value**	**Sh%**	**Y2006/2007**	**Y07**	**Y06**
Television	955	39	1,211	40	1488	41	23	156	127
Newspaper	1,098	45	1,306	43	1,532	42	17	139	119
Magazine	268	11	314	10	342	9	9	128	117
Radio	44	2	68	2	69	2	2	158	156
Outdoor	84	3	111	4	185	5	66	220	133
Cinema	6	0	7	0	7	0	4	120	116
Total	**2,455**	**100**	**3,017**	**100**	**3,623**	**100**	**20**	**147**	**123**



***** UAE Outdoor is Estimated**

Top Brands Y2007 (000 US$)

Television Top Spenders

Rank	**Brand**	**Y2007**	**%Var'n Y07/06**
1	Dove	28536	12
2	Etisalat	22341	E
3	Mobily	21785	84
4	Johnson	21769	47
5	Pepsi	20347	-12
6	Coca Cola	20255	31
7	Vodafone	16581	136
8	Du	15202	E
9	Pantene	15197	51
10	Sunsilk	15027	47
11	Saudi Telecomm	13291	-8
12	Galaxy	12428	42

Newspapers Top Spenders

Rank	**Brand**	**Y2007**	**%Var'n Y07/06**
1	Saudi Telecomm	10118	160
2	Arab Bank	9596	252
3	Chevrolet	9577	19
4	Emaar	8657	109
5	Ncb	7731	94
6	Toyota	7348	-16
7	Mobinil	7300	-6
8	Etisalat	7288	264
9	Vodafone	6314	49
10	Mobily	6145	-34
11	Samba	5860	45
12	Nokia	5057	-34

Magazines Top Spenders

Rank	**Brand**	**Y2007**	**%Var'n Y07/06**
1	Rolex	1636	0
2	Cartier	1612	71
3	Toyota	1506	-32
4	Nokia	1488	-40
5	B.m.w.	1485	-6
6	Damas	1462	-12
7	Hewlett Packard	1367	-20
8	Sony	1336	32
9	Braun	1320	64
10	Chanel	1307	22
11	Dior	1268	75
12	Mitsubishi	1262	0

Radio Top Spenders

Rank	**Brand**	**Y2007**	**%Var'n Y07/06**
1	Vodafone	1480	30
2	Mobinil	930	4
3	Etisalat	730	E
4	Drosh	721	-14
5	Lipton	663	E
6	Pepsi	643	80
7	Coca Cola	523	29
8	Mobil	492	-33
9	Projaih	487	E
10	Chevrolet	462	-22
11	Du	420	E
12	Mcdonald`s	417	38

Outdoor Top Spenders

Rank	**Brand**	**Y2007**	**%Var'n Y07/06**
1	Al Marai	5501	48
2	Saudi Telecomm	3371	24
3	Mcdonald`s	2900	10
4	Mobily	2621	-22
5	Burger King	1826	-18
6	Vodafone	1617	E
7	Kentucky	1521	-45
8	Pizza Hut	1480	28
9	Kdd	1266	E
10	Hardees	1228	-5
11	Mobinil	1228	N
12	Al Tazaj-fakieh	1188	59

E - Exceeding the limit >300%   N - New

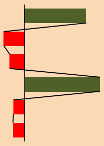
AGCC,LEVANT*,PAN ARAB & ARASIAN MEDIA MARKET (Jan-June) Y2007

Millions US$ 3623 ▲ + 20%

Thousand SESU 2207 ▲ +1%

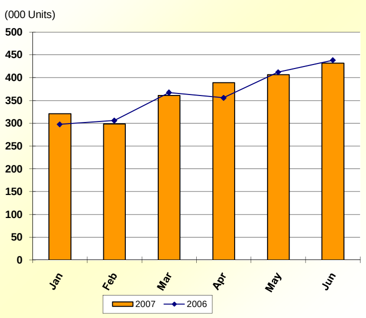
TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2007/2006Var %



Period	ALL MEDIA (SESU Units)* 2007	ALL MEDIA 2006	ALL MEDIA % Var'n	NEWSPAPERS (Pages) 2007	NEWSPAPERS % Var'n	MAGAZINES (Pages) 2007	MAGAZINES % Var'n	TELEVISION (Min) 2007	TELEVISION % Var'n
January	320845	297811	8	47488	9	15521	13	182353	14
February	298115	306053	-3	48762	13	15671	10	168788	1
March	360631	367340	-2	57326	15	17521	6	198100	-5
April	389380	355770	9	60141	24	19338	13	208606	9
May	406387	412083	-1	66109	28	19719	10	215385	-4
June	432086	438293	-1	58180	5	19039	3	219792	-7
	2207445	2177351	1	338006	16	106809	9	1193024	0

Ad Space & Seasonality



Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

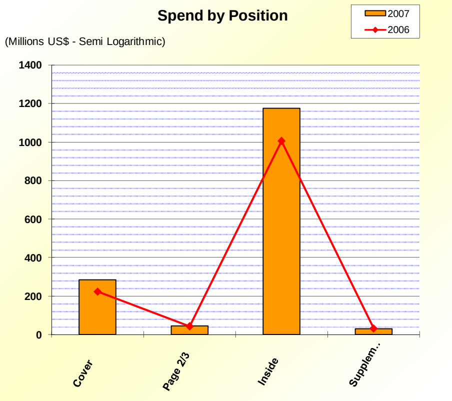
* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

NEWSPAPERS

Spend by Position (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Cover	284	19	224	17	27
Page 2/3	45	3	43	3	3
Inside	1175	77	1006	77	17
Supplement	30	2	33	3	-8
	1532	100	1306	100	17

Spend by Position

(Millions US$ - Semi Logarithmic)

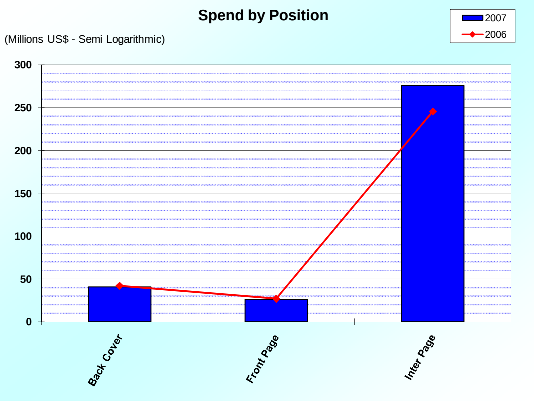


MAGAZINES

Spend by Position (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Back Cover	41	12	42	13	-3
Front Page	26	8	27	9	-3
Inter Page	276	81	245	78	12
	342	100	314	100	9

Spend by Position

(Millions US$ - Semi Logarithmic)

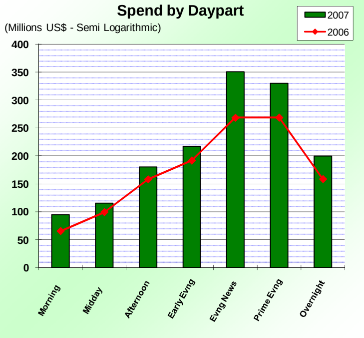


TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Morning	94	6	66	5	44
Midday	116	8	99	8	16
Afternoon	180	12	158	13	14
Early Evng	217	15	192	16	13
Evng News	351	24	269	22	31
Prime Evng	330	22	269	22	23
Overnight	200	13	159	13	26
	1488	100	1211	100	23

Spend by Daypart

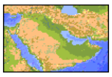
(Millions US$ - Semi Logarithmic)



TOP 30 LEAGUE OF Y2007 (000 US$)

Rank & Brand	JANUARY - JUNE 2007	JANUARY - JUNE 2006	2 YEAR TOTAL	2 YEAR AVG	MEDIA SPLIT % - JAN - JUN 2007 TV	NP	MG	OT*
1 Etisalat	31,274	3,972	35,246	17,623	71.44	23.30	1.93	3.33
2 Mobily	31,106	24,931	56,037	28,019	70.03	19.76	0.97	9.24
3 Dove	29,212	27,803	57,015	28,508	97.69	0.13	1.82	0.36
4 Saudi Telecomm	28,246	21,554	49,800	24,900	47.05	35.82	3.96	13.16
5 Vodafone	26,521	12,589	39,110	19,555	62.52	23.81	1.99	11.68
6 Pepsi	23,686	28,265	51,951	25,976	85.90	2.88	1.82	9.40
7 Coca Cola	23,064	17,923	40,987	20,494	87.82	2.02	1.86	8.30
8 Johnson	21,970	15,658	37,628	18,814	99.09	0.07	0.35	0.50
9 Du	20,675	1,118	21,793	10,897	73.53	17.77	4.26	4.45
10 Mobinil	19,947	14,171	34,118	17,059	49.43	36.60	3.15	10.82
11 Al Marai	18,955	11,543	30,498	15,249	62.37	5.99	1.42	30.21
12 Chevrolet	16,824	12,603	29,427	14,714	27.72	56.92	6.73	8.63
13 Ford	16,185	16,682	32,867	16,434	75.05	18.81	1.82	4.31
14 Pantene	16,010	10,836	26,846	13,423	94.92	0.61	3.64	0.83
15 Mcdonald`s	15,818	9,748	25,566	12,783	68.61	6.39	2.79	22.21
16 Sunsilk	15,773	10,667	26,440	13,220	95.27	0.25	2.93	1.55
17 Nokia	13,896	13,762	27,658	13,829	41.69	36.39	10.71	11.21
18 Toyota	13,799	16,063	29,862	14,931	27.05	53.25	10.91	8.78
19 Galaxy	13,462	9,610	23,072	11,536	92.32	0.65	5.10	1.93
20 Lipton	12,988	13,965	26,953	13,477	92.00	0.50	0.63	6.87
21 Lux	12,814	4,276	17,090	8,545	90.74	0.53	2.78	5.95
22 Herbal Essences	11,302	7,025	18,327	9,164	93.62	0.05	4.95	1.37
23 Head & Shoulders	11,231	9,269	20,500	10,250	98.19	0.09	0.09	1.63
24 Ncb	10,548	12,291	22,839	11,420	21.77	73.29	3.15	1.79
25 New Boy	10,534	4,799	15,333	7,667	99.99	0.00	0.01	0.00
26 Arab Bank	10,194	3,057	13,251	6,626	0.00	94.13	4.35	1.52
27 Hyundai	10,143	8,112	18,255	9,128	39.04	49.48	6.41	5.07
28 Ariel	9,595	8,271	17,866	8,933	92.78	0.74	3.14	3.35
29 Watani-UAE	9,520	10,092	19,612	9,806	98.04	1.93	0.00	0.03
30 Fulla	9,484	3,302	12,786	6,393	99.91	0.09	0.00	0.00

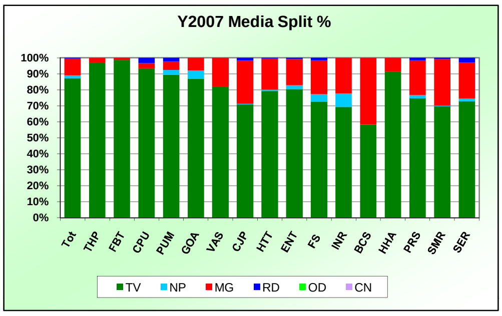
*OT=Radio+OutDoor+Cinema

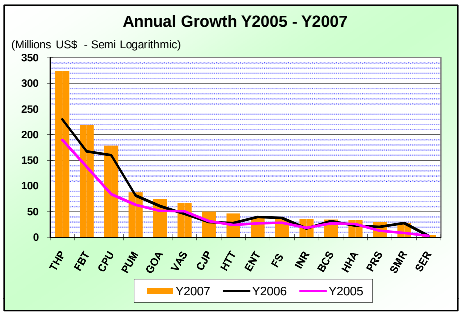


PAN ARAB - (Jan-June) Y2007

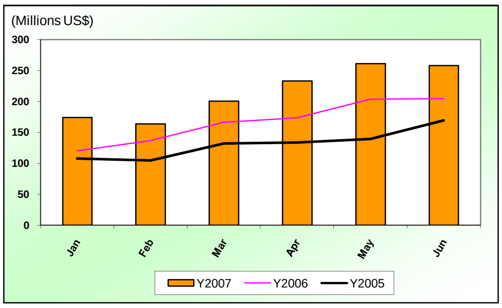
Millions US$ 1290 ▲ + 28%

Chapter	Abbreviation	Y2005	Y2006	Y2007	Sh%	%Var'n Y07/06	Media Split % TV	NP	MG	RD	OD	CN
Toiletries Hygiene/ House Care Products	THP	190	230	324	25	41	97	0	3	*	0	0
Food Beverages And Tobacco	FBT	138	168	219	17	30	98	0	1	*	0	0
Communications & Public Utilities	CPU	84	160	179	14	12	93	*	3	3	0	0
Publishig Media	PUM	64	81	88	7	8	90	3	5	2	0	0
Government/Organization Advertising	GOA	51	61	75	6	23	87	5	8	*	0	0
Vehicles,Accessories & Supply	VAS	51	46	67	5	46	82	*	18	*	0	0
Clothing,Jewellery & Personal Acs	CJP	32	30	51	4	68	71	1	27	2	0	0
Hotel, Travel & Tourism	HTT	24	28	46	4	67	79	1	19	1	0	0
Entertainment	ENT	27	40	38	3	-6	80	3	16	1	0	0
Financial Services	FS	29	38	36	3	-4	72	5	21	2	0	0
Insurance & Real Estate	INR	19	18	36	3	102	69	8	22	*	0	0
Business/Construct Equip. & Supply	BCS	28	32	35	3	9	58	*	42	*	0	0
Household Appliances	HHA	26	23	34	3	50	91	*	9	*	0	0
Professional Services	PRS	13	21	30	2	47	75	2	22	2	0	0
Shopping Malls & Retail Stores	SMR	9	28	29	2	4	70	1	29	1	0	0
Other Services	SER	3	3	5	0	51	73	2	23	3	0	0
Total		**787**	**1,005**	**1,290**	**100**	**28**	**87**	**2**	**10**	**1**	**0**	**0**


Y2007 Media Split %


Annual Growth Y2005 - Y2007

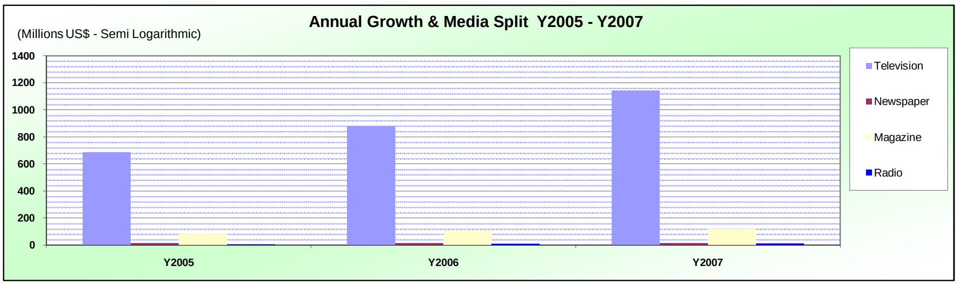
Monthly Spend Analysis (Millions US$)Y2005 - 2007



Period	Y2005	Y2006	Y2007	Var'n % Y07/06
Jan	108	120	174	45
Feb	105	137	163	20
Mar	132	166	200	20
Apr	134	174	233	34
May	139	204	261	28
Jun	169	205	258	26
Total	**787**	**1005**	**1290**	**28**

Overall Media Split Analysis (Millions US$)

Media	Y2005		Y2006		Y2007		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2006/2007	Y07	Y06
Television	686	87	878	87	1145	89	30	167	128
Newspaper	15	2	13	1	14	1	5	94	89
Magazine	82	10	104	10	119	9	15	146	127
Radio	4	1	10	1	12	1	19	296	248
Total	**787**	**100**	**1,005**	**100**	**1,290**	**100**	**28**	**164**	**128**


Annual Growth & Media Split Y2005 - Y2007

Top Brands Y2007 (000 US$)

Television Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Dove	26157	12
2	Johnson	20344	53
3	Mobily	20322	166
4	Sunsilk	13747	49
5	Vodafone	13559	175
6	Coca Cola	12971	50
7	Pepsi	12024	-18
8	Saudi Telecomm	11556	-5
9	Lipton	11044	-9
10	Ford	10608	20
11	New Boy	10522	131
12	Galaxy	10361	51
13	Lux	10230	201
14	Al Marai	10001	69
15	Du	9793	E

Newspapers Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Al Wataniya	403	N
2	Arab Bank	400	284
3	Tatweer	334	E
4	Abu Dhabi Inv.h.	288	153
5	Emirates Hights	279	N
6	Zenobia	268	N
7	Infiniti	220	N
8	Rolex	216	18
9	Sama Dubai	190	-28
10	Moh`d Bin Rshd.a	165	N
11	Limitless	159	N
12	Talaat Moustaf.g	149	N
13	Guinness World R	146	N
14	Dubai Investment	141	4
15	Snasco	141	N

Magazines Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Hewlett Packard	951	-21
2	Rolex	748	-3
3	Mitsubishi	641	14
4	Honda	604	132
5	Nokia	581	-52
6	Mercedes	580	13
7	Cartier	572	116
8	B.m.w.	556	-21
9	Toyota	547	-38
10	Dhl	539	85
11	Raymond Weil	523	E
12	Du	507	N
13	Omega	495	-21
14	Accenture	493	66
15	Sony	483	58

Radio Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Drosh	342	-23
2	Saudi Telecomm	310	77
3	Al Jazira	255	N
4	Saudi Post P.	234	N
5	Piaget	229	N
6	Projaih	219	266
7	Hail Rally	192	N
8	Al Bilad Bank	183	N
9	Alaswaq.net	165	N
10	Sabb	144	-20
11	Domino`s Pizza	130	E
12	Al Marai	116	N
13	Riyad Bank	110	N
14	Middle East	109	N
15	Luna	97	E

E - Exceeding the limit >300%   N - New

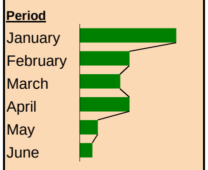
Millions US$ 1290 ▲ + 28%

Thousand SESU 835 ▲ + 12%

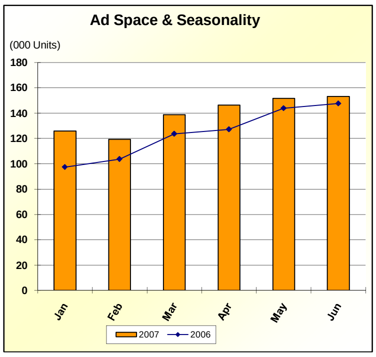
PAN ARAB - (Jan-June) Y2007

TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2007/2006Var %



ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
2007	2006	% Var'n	2007	% Var'n	2007	% Var'n	2007	% Var'n
125875	97437	29	268	-3	2956	7	119986	29
119388	103767	15	233	-30	2912	8	114062	14
138812	123704	12	303	-18	3666	17	131285	10
146330	127234	15	327	-13	3737	20	140259	15
151612	143851	5	356	-12	3840	12	145224	6
153122	147598	4	290	0	3769	5	146560	5
835139	**743590**	**12**	**1777**	**-13**	**20880**	**11**	**797375**	**12**


Ad Space & Seasonality

Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

NEWSPAPERS

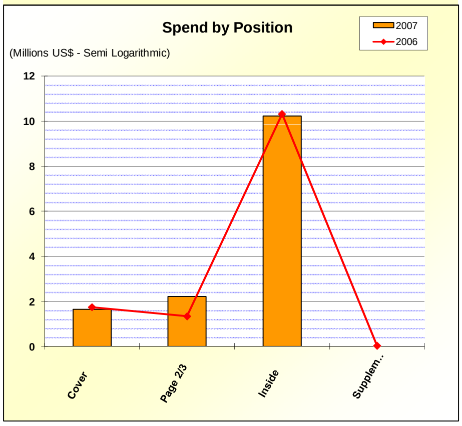
Spend by Position (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Cover	2	12	2	13	-6
Page 2/3	2	16	1	10	66
Inside	10	73	10	77	-1
Supplement		0	0		
	14	**100**	**13**	**100**	**5**

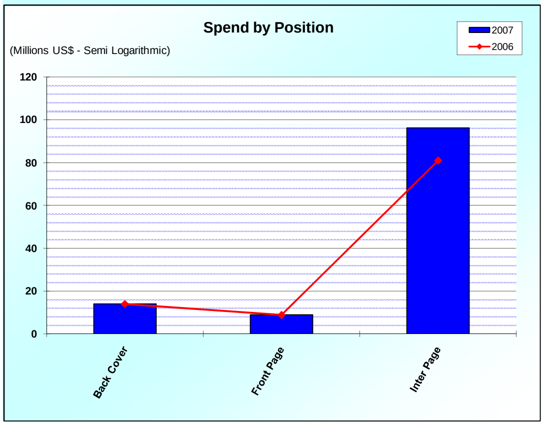
MAGAZINES

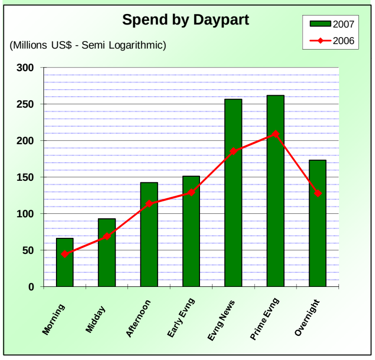
Spend by Position (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Back Cover	14	12	14	13	1
Front Page	9	7	9	9	1
Inter Page	96	81	81	78	19
	119	**100**	**104**	**100**	**15**

TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Morning	66	6	45	5	48
Midday	93	8	69	8	35
Afternoon	143	12	114	13	26
Early Evng	151	13	129	15	17
Evng News	257	22	185	21	38
Prime Evng	262	23	209	24	25
Overnight	173	15	128	15	36
	1145	**100**	**878**	**100**	**30**


Spend by Position


Spend by Position


Spend by Daypart

TOP 30 LEAGUE OF Y2007 (000 US$)

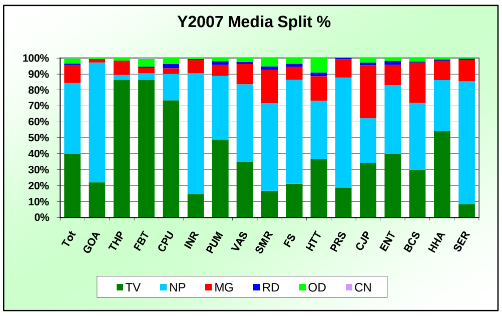
Rank & Brand	JANUARY - JUNE		2 YEAR		MEDIA SPLIT % - JAN - JUN 2007			
	2007	2006	TOTAL	AVG	TV	NP	MG	OT*
1 Dove	26,337	23,874	50,211	25,105	99.32	0.00	0.68	0.00
2 Mobily	20,542	7,808	28,350	14,175	98.93	0.07	0.58	0.42
3 Johnson	20,363	13,385	33,748	16,874	99.91	0.00	0.09	0.00
4 Sunsilk	13,892	9,359	23,251	11,625	98.95	0.00	1.04	0.00
5 Vodafone	13,564	4,928	18,492	9,246	99.96	0.00	0.04	0.00
6 Coca Cola	13,164	8,727	21,891	10,945	98.54	0.00	1.23	0.23
7 Saudi Telecomm	12,334	12,502	24,836	12,418	93.70	0.00	3.80	2.51
8 Pepsi	12,215	14,939	27,154	13,577	98.44	0.00	1.56	0.00
9 Lipton	11,049	12,196	23,245	11,622	99.95	0.00	0.04	0.00
10 Ford	10,731	8,989	19,720	9,860	98.86	0.00	1.14	0.00
11 Galaxy	10,550	6,912	17,462	8,731	98.20	0.00	1.80	0.00
12 New Boy	10,522	4,563	15,085	7,542	100.00	0.00	0.00	0.00
13 Lux	10,357	3,473	13,830	6,915	98.77	0.00	0.78	0.45
14 Du	10,299	629	10,928	5,464	95.08	0.00	4.92	0.00
15 Al Marai	10,149	5,920	16,069	8,035	98.54	0.00	0.31	1.15
16 Fulla	9,475	3,302	12,777	6,389	100.00	0.00	0.00	0.00
17 Pantene	9,359	5,721	15,080	7,540	98.02	0.00	1.98	0.00
18 Signal	8,124	7,028	15,152	7,576	100.00	0.00	0.00	0.00
19 Clear	7,905	0	7,905	3,952	98.42	0.00	1.58	0.00
20 Herbal Essences	7,782	4,158	11,940	5,970	97.90	0.00	2.10	0.00
21 Lifebuoy	7,674	3,900	11,574	5,787	98.75	0.00	0.92	0.32
22 Barbican	7,630	1,439	9,069	4,535	99.46	0.00	0.39	0.15
23 Iraq	7,596	17,864	25,460	12,730	100.00	0.00	0.00	0.00
24 Mobinil	7,592	2,736	10,328	5,164	100.00	0.00	0.00	0.00
25 Dabur	7,501	6,542	14,043	7,022	100.00	0.00	0.00	0.00
26 Etisalat	7,126	768	7,894	3,947	96.96	0.00	3.05	0.00
27 Knorr	6,962	5,866	12,828	6,414	100.00	0.00	0.00	0.00
28 Fair & Lovely	6,886	5,663	12,549	6,275	99.27	0.00	0.74	0.00
29 Head & Shoulders	6,825	5,487	12,312	6,156	100.00	0.00	0.00	0.00
30 Dettol	6,789	6,714	13,503	6,751	99.99	0.00	0.00	0.00

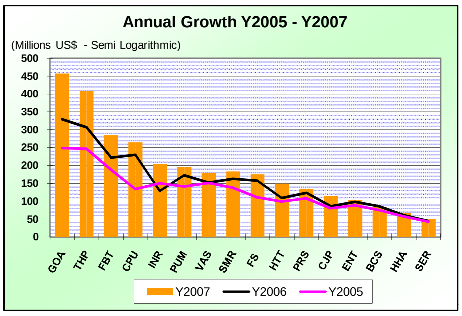
*OT=Radio+OutDoor+Cinema

AGCC, PAN ARAB & ARASIAN MEDIA MARKETS (Jan-June) Y2007

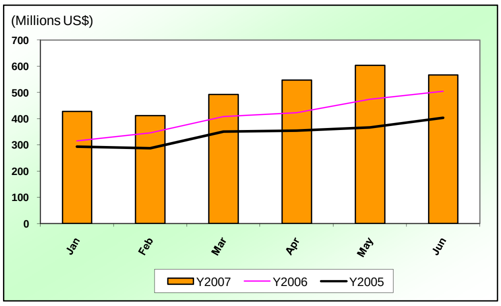
Millions US$ 3059 ▲ + 24%

Chapter	Abbreviation	Y2005	Y2006	Y2007	Sh%	%Var'n Y07/06	Media Split % TV	NP	MG	RD	OD	CN
Government/Organization Advertising	GOA	249	329	457	15	39	22	75	2	*	1	0
Toiletries Hygiene/ House Care Products	THP	247	307	408	13	33	86	3	9	*	2	*
Food Beverages And Tobacco	FBT	187	222	284	9	28	86	4	4	1	5	1
Communications & Public Utilities	CPU	134	230	265	9	15	73	17	4	3	4	*
Insurance & Real Estate	INR	150	129	205	7	59	15	76	8	1	1	0
Publishig Media	PUM	141	172	196	6	14	49	40	7	2	2	0
Vehicles,Accessories & Supply	VAS	151	152	180	6	19	35	48	13	1	3	*
Shopping Malls & Retail Stores	SMR	137	163	183	6	12	17	55	21	2	5	*
Financial Services	FS	111	158	175	6	11	21	65	8	2	4	*
Hotel, Travel & Tourism	HTT	99	109	149	5	36	37	37	15	2	9	*
Professional Services	PRS	108	124	135	4	9	19	69	11	1	*	*
Clothing,Jewellery & Personal Acs	CJP	80	86	115	4	33	34	28	33	2	3	*
Entertainment	ENT	88	98	103	3	5	40	43	13	2	2	*
Business/Construct Equip. & Supply	BCS	74	86	84	3	-1	30	42	25	1	2	*
Household Appliances	HHA	57	61	68	2	11	54	32	12	1	1	*
Other Services	SER	43	45	51	2	13	9	77	14	1	1	*
Total		**2,055**	**2,472**	**3,059**	**100**	**24**	**40**	**44**	**11**	**1**	**3**	**0**





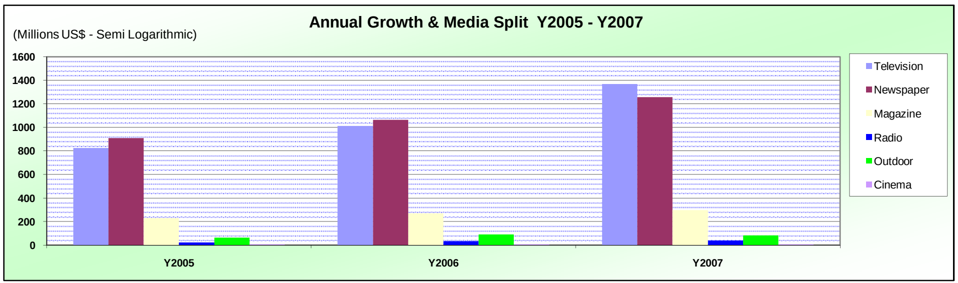
Monthly Spend Analysis (Millions US$)Y2005 - 2007



Period	Y2005	Y2006	Y2007	Var'n % Y07/06
Jan	293	315	428	36
Feb	287	345	412	19
Mar	350	409	492	20
Apr	354	423	549	30
May	367	475	606	28
Jun	403	505	572	13
Total	**2055**	**2472**	**3059**	**24**

Overall Media Split Analysis (Millions US$)

Media	Y2005		Y2006		Y2007		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2006/2007	Y07	Y06
Television	825	40	1,011	41	1370	45	35	166	123
Newspaper	909	44	1,063	43	1,258	41	18	138	117
Magazine	229	11	268	11	296	10	10	129	117
Radio	23	1	33	1	38	1	14	167	147
Outdoor	63	3	89	4	90	3	1	143	142
Cinema	6	0	7	0	7	0	4	121	117
Total	**2,055**	**100**	**2,472**	**100**	**3,059**	**100**	**24**	**148**	**120**



***UAE Outdoor is Estimated

Top Brands Y2007 (000 US$)

Television Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Dove	28073	12
2	Mobily	21785	84
3	Johnson	20532	50
4	Etisalat	19447	E
5	Pepsi	16020	0
6	Du	15202	E
7	Sunsilk	14943	52
8	Vodafone	14406	189
9	Coca Cola	13478	40
10	Saudi Telecomm	13291	-8
11	Ford	12147	14
12	Al Marai	11823	75

Newspapers Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Saudi Telecomm	10118	160
2	Chevrolet	8344	18
3	Ncb	7731	94
4	Toyota	6172	-15
5	Emaar	6164	58
6	Mobily	6134	-34
7	Samba	5860	45
8	Hewlett Packard	4210	-1
9	Riyad Bank	4192	15
10	Nissan	4144	12
11	Sony	4060	48
12	Nokia	3919	-41

Magazines Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Cartier	1504	72
2	Damas	1420	-11
3	Rolex	1399	-5
4	Hewlett Packard	1338	-19
5	B.m.w.	1311	-9
6	Toyota	1305	-28
7	Sony	1301	36
8	Braun	1270	82
9	Dior	1263	81
10	Nokia	1263	-45
11	Chanel	1241	27
12	Mitsubishi	1238	2

Radio Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Drosh	721	-14
2	Projaih	487	E
3	Mobil	433	-41
4	Du	420	E
5	Saudi Telecomm	347	34
6	Hail Rally	325	E
7	Mashreq Bank	314	E
8	Piaget	314	N
9	Little Caesar	286	10
10	Red Bull	261	243
11	Al Jazira	255	N
12	Etihad Airways	254	-33

Outdoor Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Al Marai	5501	48
2	Saudi Telecomm	3371	24
3	Mobily	2621	-22
4	Mcdonald`s	2562	6
5	Burger King	1736	-19
6	Kdd	1266	E
7	Al Tazaj-fakieh	1187	59
8	Pizza Hut	1139	3
9	N.b.k.	1096	13
10	Hardees	1000	1
11	Kentucky	923	-56
12	Mtc-vodafone	894	13

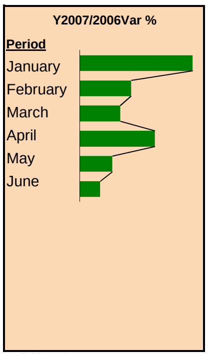
E - Exceeding the limit >300%   N - New

AGCC, PAN ARAB & ARASIAN MEDIA MARKETS (Jan-June) Y2007

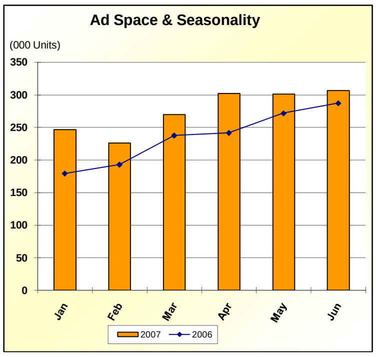
Millions US$ 3059 ▲ + 24%

Thousand SESU 1660 ▲ +17%

TOTAL MARKET ADVERTISING SPACE ALLOCATION



	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
Period	2007	2006	% Var'n	2007	% Var'n	2007	% Var'n	2007	% Var'n
January	246985	179508	38	42552	9	11148	22	158396	47
February	226193	193083	17	42804	14	10738	6	143770	19
March	269829	237780	13	49808	17	12522	4	170646	16
April	302432	241908	25	52389	25	13714	15	181203	21
May	301364	271893	11	56242	28	14186	8	185500	13
June	306842	287296	7	49115	2	13324	-5	192859	10
	1653645	**1411467**	**17**	**292911**	**16**	**75633**	**8**	**1032374**	**20**

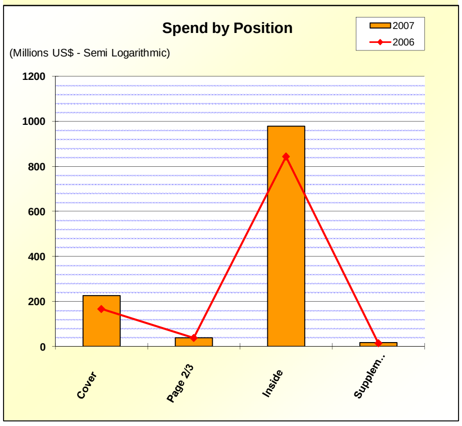


Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

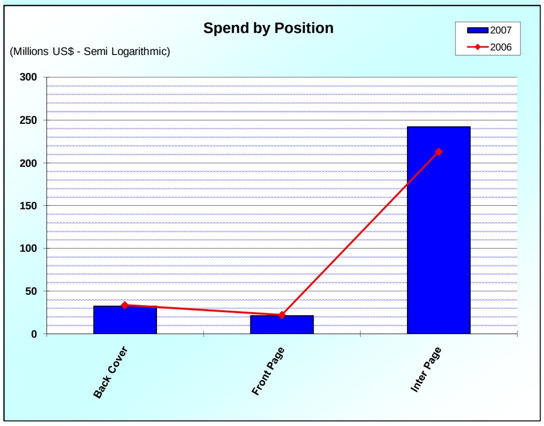
NEWSPAPERS

Spend by Position (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Cover	225	18	167	16	35
Page 2/3	38	3	38	4	1
Inside	979	78	843	79	16
Supplement	17	1	15	1	11
	1258	**100**	**1063**	**100**	**18**



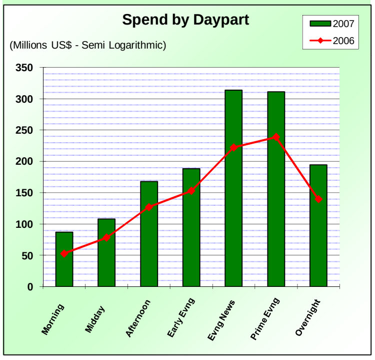
MAGAZINES

Spend by Position (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Back Cover	33	11	34	12	-3
Front Page	21	7	22	8	-3
Inter Page	242	82	213	79	14
	296	**100**	**268**	**100**	**10**



TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Morning	87	6	53	5	64
Midday	108	8	78	8	38
Afternoon	168	12	127	13	32
Early Evng	188	14	153	15	23
Evng News	313	23	222	22	41
Prime Evng	311	23	239	24	30
Overnight	194	14	140	14	39
	1370	**100**	**1011**	**100**	**35**



TOP 30 LEAGUE OF Y2007 (000 US$)

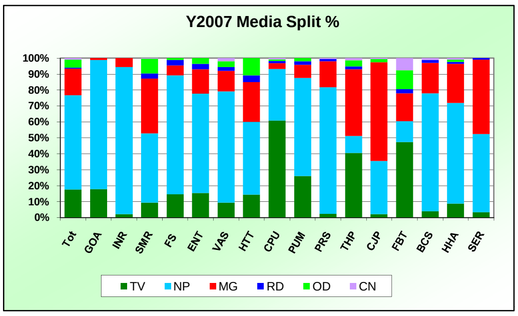
Rank & Brand	JANUARY - JUNE		2 YEAR		MEDIA SPLIT % - JAN - JUN 2007			
	2007	2006	TOTAL	AVG	TV	NP	MG	OT*
1 Mobily	31,095	24,881	55,976	27,988	70.06	19.73	0.97	9.25
2 Dove	28,673	27,283	55,956	27,978	97.91	0.14	1.79	0.17
3 Saudi Telecomm	28,240	21,553	49,793	24,897	47.06	35.83	3.94	13.17
4 Etisalat	23,097	3,951	27,048	13,524	84.20	13.66	1.99	0.16
5 Johnson	20,725	14,299	35,024	17,512	99.07	0.07	0.37	0.49
6 Du	20,624	1,118	21,742	10,871	73.71	17.81	4.02	4.46
7 Al Marai	18,947	11,538	30,485	15,243	62.40	5.95	1.43	30.22
8 Pepsi	17,696	19,104	36,800	18,400	90.53	1.96	2.10	5.41
9 Ford	15,614	15,687	31,301	15,651	77.80	16.95	1.64	3.62
10 Sunsilk	15,366	10,168	25,534	12,767	97.25	0.07	2.69	0.00
11 Chevrolet	14,786	10,446	25,232	12,616	30.62	56.43	7.26	5.68
12 Mcdonald`s	14,622	8,282	22,904	11,452	71.72	5.90	2.74	19.63
13 Coca Cola	14,592	10,760	25,352	12,676	92.37	1.64	2.62	3.38
14 Vodafone	14,486	5,019	19,505	9,753	99.45	0.00	0.55	0.00
15 Lux	12,129	4,084	16,213	8,107	94.88	0.07	2.37	2.68
16 Lipton	12,034	13,587	25,621	12,811	98.06	0.34	0.37	1.23
17 Galaxy	11,842	7,806	19,648	9,824	94.45	0.01	5.46	0.08
18 Toyota	11,528	13,589	25,117	12,559	29.80	53.54	11.32	5.34
19 Nokia	11,418	11,541	22,959	11,480	49.01	34.32	11.06	5.61
20 Ncb	10,540	12,288	22,828	11,414	21.78	73.35	3.07	1.79
21 New Boy	10,523	4,567	15,090	7,545	99.99	0.00	0.01	0.00
22 Pantene	10,480	6,829	17,309	8,655	94.67	0.90	4.44	0.00
23 Herbal Essences	9,538	4,664	14,202	7,101	92.67	0.06	5.87	1.39
24 Watani	9,516	10,086	19,602	9,801	98.08	1.89	0.00	0.03
25 Fulla	9,484	3,302	12,786	6,393	99.91	0.09	0.00	0.00
26 Clear	9,155	0	9,155	4,578	91.04	1.94	3.50	3.52
27 Barbican	8,758	1,481	10,239	5,120	99.35	0.16	0.35	0.14
28 Samba	8,735	5,776	14,511	7,256	24.98	67.09	4.44	3.49
29 Lifebuoy	8,732	4,162	12,894	6,447	96.12	0.21	2.34	1.34
30 Signal	8,681	7,536	16,217	8,109	99.68	0.00	0.15	0.17

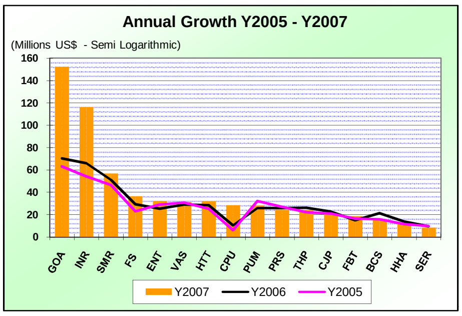
*OT=Radio+OutDoor+Cinema/***UAE Outdoor is Estimated

UNITED ARAB EMIRATES - (Jan-June) Y2007

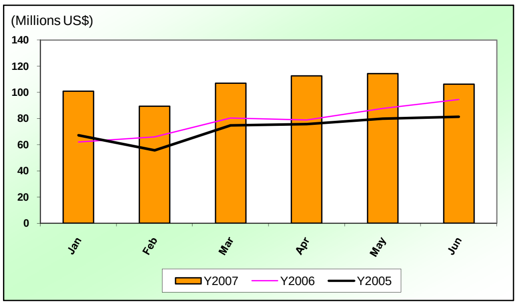
Millions US$ 643 ▲ + 37%

						%Var'n	Media Split %					
Chapter	**Abbreviation**	**Y2005**	**Y2006**	**Y2007**	**Sh%**	**Y07/06**	**TV**	**NP**	**MG**	**RD**	**OD**	**CN**
Government/Organization Advertising	GOA	63	70	152	24	116	18	81	1	*	*	0
Insurance & Real Estate	INR	54	66	116	18	76	2	92	6	*	*	0
Shopping Malls & Retail Stores	SMR	47	51	57	9	11	9	43	34	3	9	1
Financial Services	FS	23	29	37	6	25	15	74	6	3	1	*
Entertainment	ENT	29	25	32	5	27	15	62	15	3	4	*
Vehicles,Accessories & Supply	VAS	31	29	31	5	8	10	70	13	2	4	2
Hotel, Travel & Tourism	HTT	25	28	32	5	12	15	45	25	4	11	*
Communications & Public Utilities	CPU	6	10	29	4	174	61	32	4	2	1	1
Publishig Media	PUM	32	26	28	4	10	26	61	8	2	2	*
Professional Services	PRS	27	26	24	4	-6	3	79	16	1	*	1
Toiletries Hygiene/ House Care Products	THP	22	26	24	4	-7	41	11	42	2	4	2
Clothing,Jewellery & Personal Acs	CJP	21	23	21	3	-6	2	33	62	*	2	1
Food Beverages And Tobacco	FBT	16	15	19	3	28	47	13	18	3	12	8
Business/Construct Equip. & Supply	BCS	16	21	16	2	-25	4	74	19	2	*	1
Household Appliances	HHA	12	14	11	2	-16	9	63	25	1	1	1
Other Services	SER	10	9	8	1	-10	3	49	46	1	*	*
Total		**435**	**470**	**643**	**100**	**37**	**18**	**59**	**17**	**1**	**5**	**1**





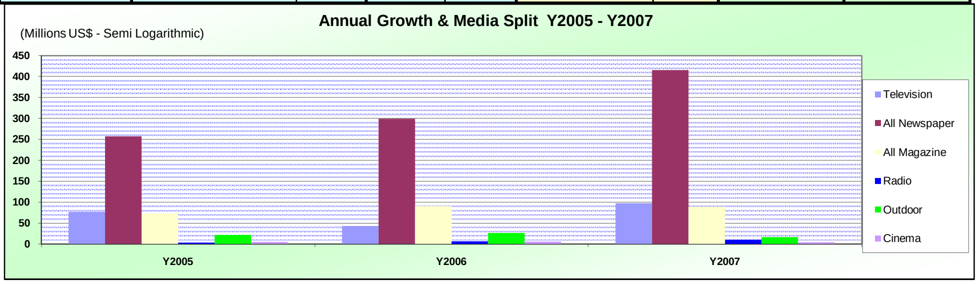
Monthly Spend Analysis (Millions US$)Y2005 - 2007



				Var'n %
Period	**Y2005**	**Y2006**	**Y2007**	**Y07/06**
Jan	67	62	101	62
Feb	56	66	89	35
Mar	75	81	107	33
Apr	76	79	116	47
May	80	88	117	33
Jun	81	94	112	19
Total	**435**	**470**	**643**	**37**

Overall Media Split Analysis (Millions US$)

Media	**Y2005**		**Y2006**		**Y2007**		**Var'n %**	**Growth Index***	
	Value	**Sh%**	**Value**	**Sh%**	**Value**	**Sh%**	**Y2006/2007**	**Y07**	**Y06**
Television	77	18	43	9	97	15	128	127	56
All Newspaper	**257**	**59**	**299**	**64**	**416**	**65**	**39**	**162**	**116**
Arabic	117	27	132	28	171	27	30	146	113
English	140	32	167	36	244	38	46	174	119
All Magazine	**73**	**17**	**91**	**19**	**88**	**14**	**-2**	**122**	**125**
Arabic	31	7	34	7	32	5	-7	101	109
English	41	9	56	12	57	9	1	138	137
Radio	3	1	6	1	11	2	80	368	204
Outdoor	21	5	26	6	25	4	-5	118	125
Cinema	5	1	5	1	6	1	12	129	116
Total	**435**	**100**	**470**	**100**	**643**	**100**	**37**	**145**	**108**



***UAE Outdoor is Estimated

Top Brands Y2007 (000 US$)

Television Top Spenders

Rank	**Brand**	**Y2007**	**%Var'n Y07/06**
1	Etisalat	10851	E
2	Watani-UAE	6114	40
3	Du	5164	E
4	Dubai Chamb.of C	3841	E
5	Tatweer	3594	E
6	Visa	3264	E
7	Pepsi	2838	E
8	Dubai I.dty Free	2749	E
9	United Nations	2710	N
10	Emirates Airline	2443	E
11	Khaliji 18	2329	N
12	Colgate	2033	N

Newspapers Top Spenders

Rank	**Brand**	**Y2007**	**%Var'n Y07/06**
1	Emaar	5592	92
2	Du	3633	E
3	Etisalat	3107	57
4	Better Homes	3017	37
5	Deyaar	2872	136
6	Chevrolet	2804	77
7	Traffic Campaign	2255	N
8	Adcb	2046	125
9	Dubai Islamic Bank	1979	55
10	Hydra	1910	N
11	Sony	1909	43
12	Nokia	1873	-27

Magazines Top Spenders

Rank	**Brand**	**Y2007**	**%Var'n Y07/06**
1	Damas	952	-32
2	Home Center	608	108
3	Sony	569	21
4	Braun	438	45
5	Toyota	397	-2
6	Olay	389	126
7	Chevrolet	388	5
8	B.m.w.	386	-4
9	Nivea	386	132
10	Mahallati	381	E
11	Galaxy	352	215
12	Rolex	350	-16

Radio Top Spenders

Rank	**Brand**	**Y2007**	**%Var'n Y07/06**
1	Du	348	E
2	Mashreq Bank	219	E
3	Etihad Airways	184	-38
4	Rak Bank	165	-22
5	Emirates Bank Gr	129	229
6	Dubai Islamic Bank	122	N
7	Nat`l B.dubai	105	-40
8	Ajman Corniche R	101	N
9	Hyundai	87	N
10	Al Kaheel	86	N
11	Al Futtaim Auto.	77	N
12	Ibn Battuta Mall	76	64

Outdoor Top Spenders

Rank	**Brand**	**Y2007**	**%Var'n Y07/06**
1	Mcdonald`s	815	-25
2	Damas	798	-43
3	Burger King	706	-32
4	Dolce _ Gabbana	462	N
5	Arla	438	N
6	Rosy Blue	428	N
7	Pure Gold Jewel.	411	-40
8	Kentucky	350	-58
9	Dubai Shop.fest.	333	29
10	Alukkas Jewelery	326	-18
11	Ajmal	309	51
12	Hardees	299	-50

E - Exceeding the limit >300%   N - New

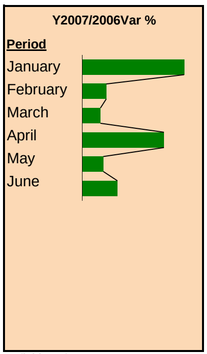
UNITED ARAB EMIRATES - (Jan-June) Y2007

Millions US$ 634 ▲ + 35%

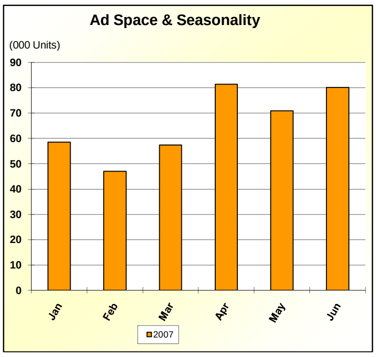
Thousand SESU 395 ▲ + 29%

ADVERTISING SPACE ALLOCATION AND POSITIONING

TOTAL MARKET ADVERTISING SPACE ALLOCATION



ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
2007	2006	% Var'n	2007	% Var'n	2007	% Var'n	2007	% Var'n
58580	34807	68	18195	22	4607	30	16194	361
47073	40495	16	17287	18	4365	0	9596	58
57345	51085	12	19132	10	5121	-4	14464	112
81458	52670	55	18960	19	5484	4	17066	103
70965	62078	14	20791	30	5823	9	16340	82
80130	64848	24	18962	12	5229	-16	18029	84
395552	**305983**	**29**	**113325**	**18**	**30629**	**2**	**91690**	**111**

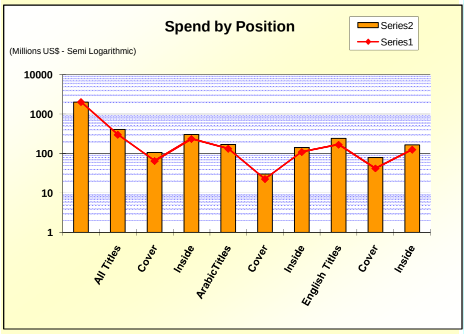


Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

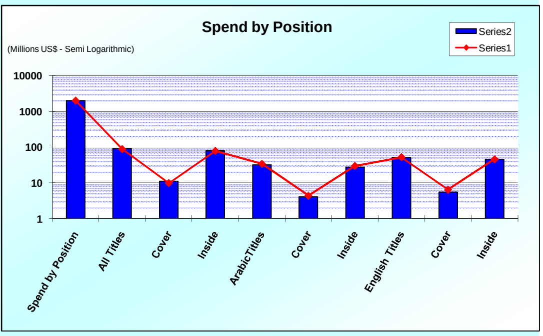
NEWSPAPERS

Spend by Position (Millions US $)	2007 Value	 %	2006 Value	 %	Var'n %
All Titles	416	100	299	100	39
Cover	109	26	65	22	68
Inside	307	74	234	78	31
ArabicTitles	172	41	132	44	30
Cover	30	7	23	8	35
Inside	141	34	109	36	30
English Titles	244	59	167	56	46
Cover	78	19	42	14	86
Inside	166	40	125	42	32
Total	**416**	**100**	**299**	**100**	**39**



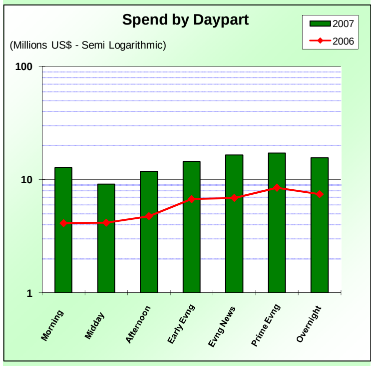
MAGAZINES

Spend by Position (Millions US $)	2007 Value	 %	2006 Value	 %	Var'n %
All Titles	91	100	88	100	2
Cover	11	12	10	11	13
Inside	79	88	79	89	1
ArabicTitles	32	35	34	39	-7
Cover	4	4	4	5	-8
Inside	28	31	30	34	-7
English Titles	51	56	52	59	-2
Cover	5	6	6	7	-15
Inside	46	50	46	52	-1
Total	**91**	**100**	**88**	**100**	**2**



TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2007 Value	 %	2006 Value	 %	Var'n %
Morning	13	13	4	10	208
Midday	9	9	4	10	119
Afternoon	12	12	5	11	147
Early Evng	14	15	7	16	114
Evng News	16	17	7	16	139
Prime Evng	17	18	8	20	103
Overnight	16	16	7	17	110
	97	**100**	**43**	**100**	**128**



TOP 30 LEAGUE OF Y2006 (000 US$)

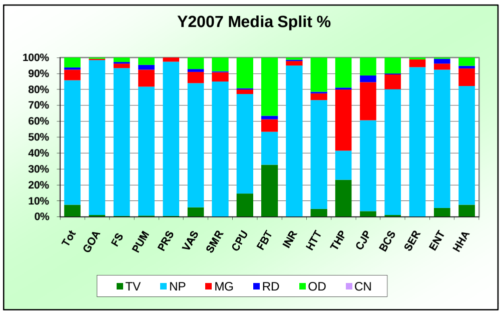
Rank & Brand	JANUARY - DECEMBER		2 YEAR		MEDIA SPLIT % - JAN - JUN 2007			
	2007	2006	TOTAL	AVG	TV	NP	MG	OT*
1 Etisalat	14,207	3,020	17,227	8,613	76.38	21.87	1.58	0.18
2 Du	9,937	465	10,402	5,201	51.97	36.56	2.94	8.53
3 Watani-UAE	6,293	4,957	11,250	5,625	97.15	2.85	0.00	0.00
4 Emaar	5,781	3,007	8,788	4,394	0.05	96.72	2.93	0.30
5 Tatweer	4,738	1,192	5,930	2,965	75.86	23.78	0.36	0.00
6 Dubai Chamb.of C	3,949	452	4,401	2,200	97.26	2.73	0.00	0.00
7 Emirates Airline	3,635	1,620	5,255	2,628	67.22	21.08	4.10	7.62
8 Chevrolet	3,567	2,266	5,833	2,917	4.38	78.61	10.89	6.12
9 Pepsi	3,566	970	4,536	2,268	79.59	2.74	1.91	15.77
10 Visa	3,453	287	3,740	1,870	94.53	4.37	0.85	0.27
11 Damas	3,176	3,804	6,980	3,490	38.75	5.82	29.99	25.45
12 Better Homes	3,157	2,357	5,514	2,757	0.00	95.58	4.41	0.00
13 Roads & Transp.	3,149	270	3,419	1,710	47.49	50.78	0.00	1.73
14 Deyaar	2,924	1,354	4,278	2,139	0.00	98.22	1.79	0.00
15 Sony	2,909	2,443	5,352	2,676	4.27	65.64	19.55	10.55
16 Dubai I.dty Free	2,842	281	3,123	1,562	96.74	1.20	2.07	0.00
17 United Nations	2,712	3	2,715	1,357	99.93	0.06	0.00	0.00
18 Khaliji 18	2,536	0	2,536	1,268	91.83	7.05	0.42	0.71
19 Traffic Campaign	2,507	7	2,514	1,257	10.02	89.97	0.00	0.00
20 Nat`l B.dubai	2,388	2,005	4,393	2,197	4.78	77.95	12.37	4.90
21 Nokia	2,365	3,735	6,100	3,050	0.00	79.18	11.65	9.17
22 Adcb	2,260	1,698	3,958	1,979	4.23	90.53	2.90	2.33
23 Dubai Islamic Bank	2,257	1,548	3,805	1,902	5.13	87.70	1.75	5.40
24 Colgate	2,033	2	2,035	1,017	99.99	0.00	0.00	0.00
25 Dubai Media Est.	2,018	0	2,018	1,009	99.87	0.12	0.00	0.00
26 Sorouh	1,981	778	2,759	1,380	62.43	37.05	0.53	0.00
27 Hydra	1,961	0	1,961	981	0.00	97.41	2.60	0.00
28 Sherwoods	1,928	936	2,864	1,432	0.00	97.04	2.94	0.00
29 Hewlett Packard	1,867	1,998	3,865	1,933	2.77	81.61	13.43	2.20
30 Ford	1,759	2,198	3,957	1,978	54.72	30.55	3.01	11.70

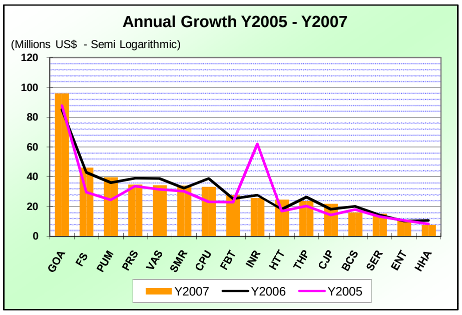
*OT=Radio+OutDoor+Cinema

KINGDOM OF SAUDI ARABIA - (Jan-June) Y2007

Millions US$ 492 ▲ + 2%

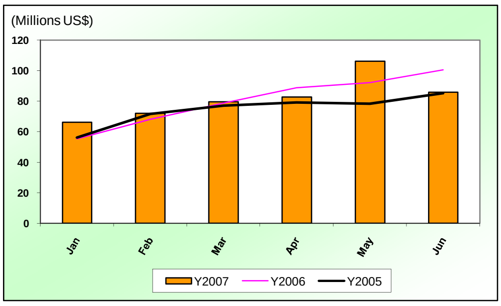
Chapter	Abbreviation	Y2005	Y2006	Y2007	Sh%	%Var'n Y07/06	Media Split % TV	NP	MG	RD	OD	CN
Government/Organization Advertising	GOA	88	85	96	19	13	1	97	1	*	1	0
Financial Services	FS	30	43	46	9	8	1	93	3	1	3	0
Publishig Media	PUM	25	36	40	8	10	1	81	11	3	5	0
Professional Services	PRS	34	39	35	7	-11	1	96	3	*	*	0
Vehicles,Accessories & Supply	VAS	32	39	34	7	-12	6	78	7	2	7	0
Shopping Malls & Retail Stores	SMR	30	32	34	7	6	0	85	6	1	9	0
Communications & Public Utilities	CPU	23	39	33	7	-14	15	62	3	1	19	0
Food Beverages And Tobacco	FBT	23	25	28	6	9	33	21	8	2	37	0
Insurance & Real Estate	INR	62	28	26	5	-6	*	95	3	1	1	0
Hotel, Travel & Tourism	HTT	17	18	25	5	36	5	68	4	1	22	0
Toiletries Hygiene/ House Care Products	THP	20	26	24	5	-9	23	18	39	1	19	0
Clothing,Jewellery & Personal Acs	CJP	14	18	22	4	20	4	57	24	4	11	0
Business/Construct Equip. & Supply	BCS	18	20	16	3	-21	1	79	9	1	10	0
Other Services	SER	13	14	15	3	8	0	94	5	*	1	0
Entertainment	ENT	11	10	11	2	10	6	87	4	3	1	0
Household Appliances	HHA	8	11	8	2	-27	8	75	11	2	5	0
Total		**448**	**483**	**492**	**100**	**2**	**8**	**78**	**7**	**2**	**6**	**0**


Y2007 Media Split %


Annual Growth Y2005 - Y2007

(Millions US$ - Semi Logarithmic)

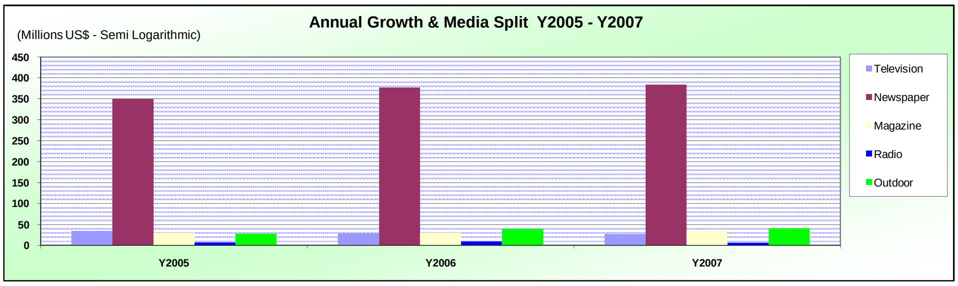
Monthly Spend Analysis (Millions US$)Y2005 - 2007



Period	Y2005	Y2006	Y2007	Var'n % Y07/06
Jan	56	55	66	20
Feb	72	68	72	6
Mar	77	79	80	1
Apr	79	89	83	-7
May	78	92	106	15
Jun	85	101	86	-15
Total	**448**	**483**	**492**	**2**

Overall Media Split Analysis (Millions US$)

Media	Y2005		Y2006		Y2007		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2006/2007	Y07	Y06
Television	34	8	28	6	27	6	-4	79	82
Newspaper	350	78	377	78	384	78	2	110	108
Magazine	30	7	30	6	34	7	15	116	101
Radio	7	1	9	2	6	1	-34	90	137
Outdoor	28	6	39	8	41	8	4	148	142
Total	**448**	**100**	**483**	**100**	**492**	**100**	**2**	**110**	**108**


Annual Growth & Media Split Y2005 - Y2007

(Millions US$ - Semi Logarithmic)

Top Brands Y2007 (000 US$)

Television Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Saudi Telecomm	1582	-20
2	Al Marai	1401	81
3	Mobily	1050	-74
4	Dettol	754	24
5	Al Safi Danone	732	31
6	Safra	691	N
7	Pepsi	680	288
8	Easy Off Bam	656	N
9	Kraft	618	53
10	Rabea	589	E
11	Abu Kass	545	E
12	Ford	545	118

Newspapers Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Saudi Telecomm	10112	161
2	Ncb	7726	94
3	Mobily	6107	-34
4	Samba	5841	46
5	Riyad Bank	4192	15
6	Chevrolet	3565	-4
7	Toyota	3120	-14
8	Al Rajhi Bank	2709	-31
9	Al Bilad Bank	2429	101
10	Saudi French B.	2295	17
11	Sabb	2226	-15
12	Saudi Invest.b.	1976	29

Magazines Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Saudi Telecomm	515	E
2	Givenchy	432	E
3	Dior	403	258
4	Olay	359	49
5	Shiseido	325	E
6	Lancome	322	E
7	Saad Special.h.	283	31
8	Chanel	279	91
9	Samba	253	59
10	Omega	243	-11
11	Braun	243	140
12	Cartier	219	117

Radio Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Mobil	433	-41
2	Drosh	379	-4
3	Projaih	268	E
4	Abu Kass	217	166
5	Funoon Al Jazira	199	N
6	Saudi Post Est.	169	E
7	Mobily	169	110
8	Biyajeh	167	N
9	Hail Rally	133	E
10	Lg	111	-39
11	Ncci	97	-64
12	Al Marai	91	N

Outdoor Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Al Marai	5365	72
2	Saudi Telecomm	3371	24
3	Mobily	2621	-22
4	Al Tazaj-fakieh	1187	62
5	Mcdonald`s	789	145
6	Nadec	730	N
7	Obeikan	721	292
8	Abu Kass	672	E
9	Nas	615	N
10	Chevrolet	540	E
11	Pigeon	521	-34
12	Kudu	516	3

E - Exceeding the limit >300% N - New

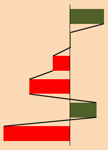
KINGDOM OF SAUDI ARABIA - (Jan-June) Y2007

Millions US$ 492 ▲ + 2%

Thousand SESU 82 ▼ - 5%

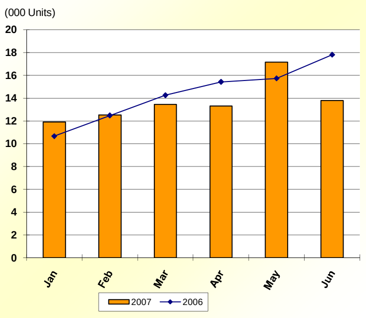
TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2007/2006Var %



Period	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
	2007	2006	% Var'n	2007	% Var'n	2007	% Var'n	2007	% Var'n
January	11907	10674	12	6473	12	823	16	1863	60
February	12525	12484	0	6951	-3	826	8	1482	-7
March	13443	14264	-6	7779	-5	986	7	1399	-35
April	13307	15427	-14	7986	-10	967	-8	1627	-8
May	17161	15734	9	11399	22	1002	-19	1833	1
June	13805	17807	-22	7648	-27	960	-25	2108	-15
	82148	**86389**	**-5**	**48237**	**-3**	**5563**	**-7**	**10311**	**-6**

Ad Space & Seasonality



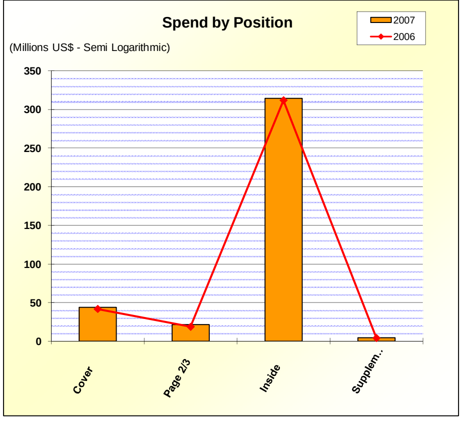
Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

NEWSPAPERS

Spend by Position (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Cover	44	11	42	11	5
Page 2/3	21	6	19	5	13
Inside	314	82	312	83	1
Supplement	5	1	4	1	3
	384	**100**	**377**	**100**	**2**

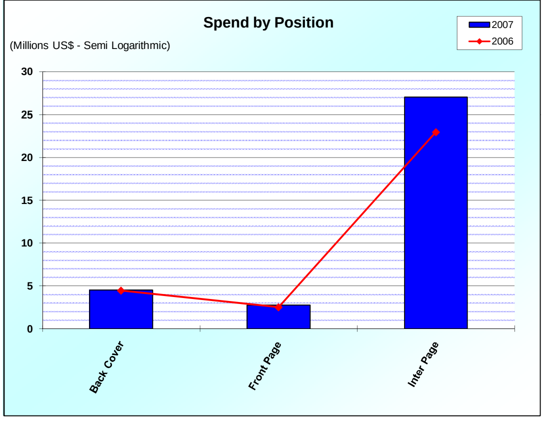
Spend by Position



MAGAZINES

Spend by Position (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Back Cover	5	13	4	15	2
Front Page	3	8	3	8	10
Inter Page	27	79	23	77	18
	34	**100**	**30**	**100**	**15**

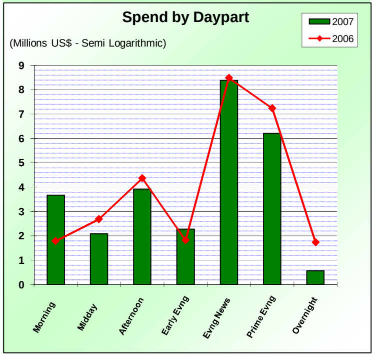
Spend by Position



TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Morning	4	14	2	6	105
Midday	2	8	3	10	-22
Afternoon	4	14	4	16	-10
Early Evng	2	8	2	6	25
Evng News	8	31	8	30	-1
Prime Evng	6	23	7	26	-14
Overnight	1	2	2	6	-68
	27	**100**	**28**	**100**	**-4**

Spend by Daypart



TOP 30 LEAGUE OF Y2007 (000 US$)

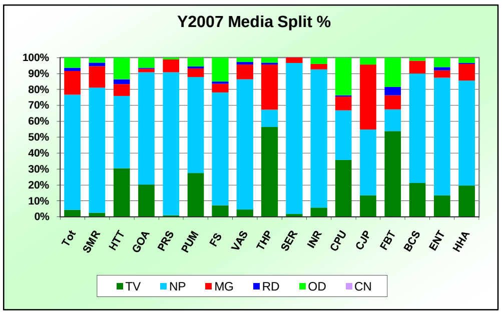
Rank & Brand	JANUARY - JUNE		2 YEAR		MEDIA SPLIT % - JAN - JUN 2007			
	2007	2006	TOTAL	AVG	TV	NP	MG	OT*
1 Saudi Telecomm	15,618	8,712	24,330	12,165	10.13	64.74	3.30	21.83
2 Mobily	10,081	16,818	26,899	13,450	10.42	60.58	1.33	27.67
3 Ncb	8,084	5,637	13,721	6,861	0.45	95.57	1.64	2.34
4 Al Marai	7,834	4,681	12,515	6,258	17.89	11.36	1.12	69.64
5 Samba	6,347	4,639	10,986	5,493	0.32	92.03	3.98	3.68
6 Chevrolet	4,606	4,417	9,023	4,512	6.68	77.40	3.94	11.98
7 Riyad Bank	4,384	3,752	8,136	4,068	0.28	95.63	3.73	0.36
8 Toyota	3,795	6,395	10,190	5,095	8.55	82.22	1.33	7.90
9 Al Rajhi Bank	3,288	4,734	8,022	4,011	3.96	82.39	1.82	11.83
10 Al Bilad Bank	2,847	1,730	4,577	2,288	0.00	85.32	3.54	11.14
11 Sabb	2,820	3,756	6,576	3,288	0.00	78.94	5.79	15.27
12 Saudi French B.	2,436	2,093	4,529	2,264	0.00	94.23	2.67	3.09
13 Saudi Arabian	2,416	1,612	4,028	2,014	11.40	71.12	7.58	9.90
14 Hewlett Packard	2,164	2,204	4,368	2,184	0.00	90.21	5.30	4.50
15 Saad Special.h.	2,130	1,132	3,262	1,631	0.00	86.71	13.28	0.00
16 Saudi Invest.b.	2,065	1,543	3,608	1,804	4.27	95.71	0.00	0.00
17 Arab National B.	2,005	2,539	4,544	2,272	0.00	97.35	0.81	1.84
18 Abu Kass	1,989	370	2,359	1,180	27.41	26.30	1.62	44.68
19 Nokia	1,899	3,659	5,558	2,779	0.00	67.77	10.24	21.99
20 Lg	1,884	1,368	3,252	1,626	0.00	86.25	7.73	6.03
21 Shuaa Capital	1,855	843	2,698	1,349	0.00	99.98	0.00	0.00
22 Al Tayyar	1,835	1,163	2,998	1,499	0.00	96.38	3.59	0.00
23 Drosh	1,724	858	2,582	1,291	26.89	27.23	0.72	45.15
24 Nas	1,723	5	1,728	864	0.00	64.32	0.00	35.68
25 Lexus	1,616	1,238	2,854	1,427	4.53	89.85	5.60	0.00
26 Gazzaz	1,589	1,030	2,619	1,309	0.00	95.79	4.20	0.00
27 Al Jomaih	1,585	2,579	4,164	2,082	0.00	95.51	0.00	4.47
28 Saudi Post Est.	1,537	190	1,727	864	13.29	51.93	0.00	34.77
29 Dar Al Arkan	1,499	759	2,258	1,129	5.47	78.75	3.96	11.79
30 Al Muttahed	1,459	10	1,469	734	0.00	96.78	2.09	1.10

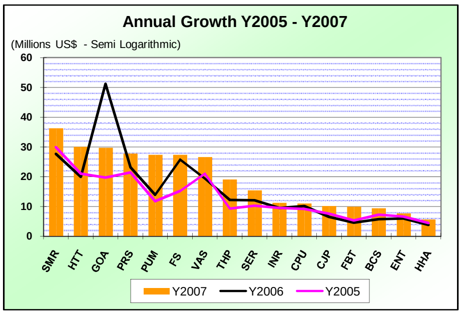
*OT=Radio+OutDoor+Cinema

KUWAIT - (Jan-June) Y2007

Millions US$ 305 ▲ + 21%

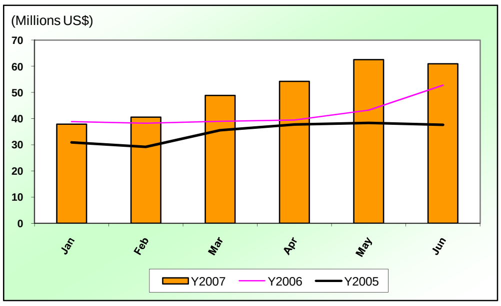
Chapter	Abbreviation	Y2005	Y2006	Y2007	Sh%	%Var'n Y07/06	Media Split % TV	NP	MG	RD	OD	CN
Shopping Malls & Retail Stores	SMR	30	28	36	12	31	3	78	14	2	3	0
Hotel, Travel & Tourism	HTT	21	20	30	10	50	31	45	7	3	14	0
Government/Organization Advertising	GOA	20	51	30	10	-42	20	71	2	1	6	0
Professional Services	PRS	21	23	28	9	20	1	90	8	*	1	0
Publishig Media	PUM	12	14	27	9	97	28	60	5	1	6	0
Financial Services	FS	15	26	27	9	6	7	71	6	1	15	0
Vehicles,Accessories & Supply	VAS	21	19	27	9	37	5	82	9	2	3	0
Toiletries Hygiene/ House Care Products	THP	9	12	19	6	56	56	11	28	1	3	0
Other Services	SER	10	12	15	5	28	2	95	3	*	*	0
Insurance & Real Estate	INR	9	9	11	4	20	6	86	3	*	4	0
Communications & Public Utilities	CPU	9	10	11	4	9	36	31	9	1	24	0
Clothing,Jewellery & Personal Acs	CJP	8	6	10	3	58	14	41	41	*	4	0
Food Beverages And Tobacco	FBT	5	5	10	3	122	54	14	9	5	19	0
Business/Construct Equip. & Supply	BCS	7	6	9	3	63	21	68	8	*	2	0
Entertainment	ENT	7	6	8	3	30	13	74	5	2	6	0
Household Appliances	HHA	4	4	6	2	49	20	66	10	1	4	0
Total		**210**	**251**	**305**	**100**	**21**	**5**	**72**	**15**	**2**	**6**	**0**


Y2007 Media Split %


Annual Growth Y2005 - Y2007

(Millions US$ - Semi Logarithmic)

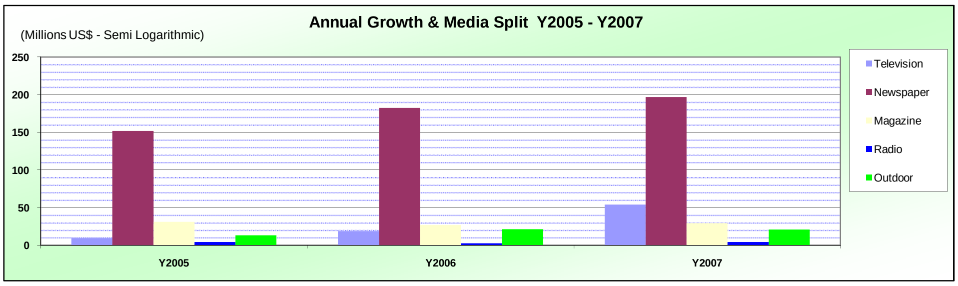
Monthly Spend Analysis (Millions US$)Y2005 - 2007



Period	Y2005	Y2006	Y2007	Var'n % Y07/06
Jan	31	39	38	-2
Feb	29	38	41	6
Mar	36	39	49	26
Apr	38	39	54	37
May	38	43	63	45
Jun	38	53	61	16
Total	**210**	**251**	**305**	**21**

Overall Media Split Analysis (Millions US$)

Media	Y2005		Y2006		Y2007		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2006/2007	Y07	Y06
Television	9	5	19	7	54	18	188	568	198
Newspaper	152	72	183	73	197	64	8	130	120
Magazine	31	15	27	11	29	10	11	95	85
Radio	4	2	2	1	4	1	69	101	60
Outdoor	13	6	21	8	21	7	-2	156	159
Total	**210**	**100**	**251**	**100**	**305**	**100**	**21**	**146**	**120**


Annual Growth & Media Split Y2005 - Y2007

(Millions US$ - Semi Logarithmic)

Top Brands Y2007 (000 US$)

Television Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Mcdonald`s	6787	E
2	Gulf Bank	1679	E
3	Etisalat	1601	N
4	Crown Forex	906	N
5	Barbican	903	N
6	Cleopatra	858	N
7	El Araby	845	N
8	Cleopatra Ceramc	807	N
9	Little Caesar	801	8
10	Colgate	762	N
11	Toshiba	746	N
12	Nivea	717	E

Newspapers Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	N.b.k.	2518	29
2	Kuwait Finan.h.	2444	55
3	Demise	2179	24
4	Gulf Bank	1453	-33
5	Wataniya Telecom	1374	-19
6	Toyota	1276	-26
7	B.k.m.e.	1174	-54
8	Nissan	1141	84
9	Kwt.nat.cinema	1137	16
10	Lulu Hyper Markt	1117	N
11	Dar Al Shifa	1008	231
12	Chevrolet	957	-5

Magazines Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Cartier	353	66
2	Virgin	334	-4
3	Mtc-vodafone	329	46
4	Virgin-master C.	272	148
5	N.b.k.	253	-3
6	Audemars Piguet	252	0
7	Seat	248	53
8	Givenchy	245	73
9	Subaru	244	134
10	Braun	239	230
11	Gulf Bank	236	-2
12	Orbit	228	-8

Radio Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Little Caesar	286	10
2	Popeyes	211	54
3	Al Ghanim	118	N
4	N.b.k.	79	98
5	M.h. Al Shaya	79	E
6	Al Ahli B.of Kwt	75	N
7	Jazeera Airways	71	N
8	Mitsubishi	66	-1
9	Red Bull	65	N
10	Wataniya Telecom	59	E
11	Dunlop	47	-28
12	Centrepoint	46	73

Outdoor Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	N.b.k.	1096	13
2	Mtc-vodafone	894	13
3	Burger King	875	0
4	Mtc	832	N
5	Kdd	656	E
6	Pizza Hut	650	12
7	Kuwait Finan.h.	606	12
8	Mcdonald`s	588	2
9	Hardees	509	29
10	Wataniya Telecom	507	-35
11	Gulf Bank	451	-32
12	Burgan Bank	404	-30

E - Exceeding the limit >300%   N - New

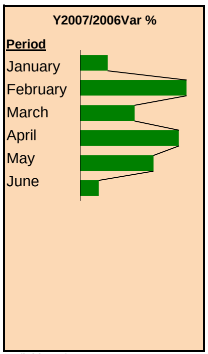
KUWAIT - (Jan-June) Y2007

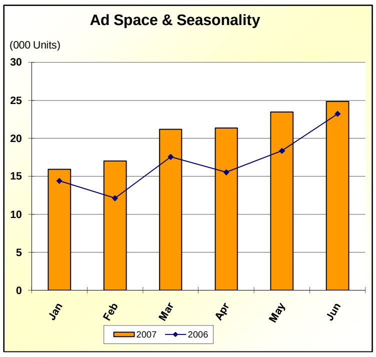
Millions US$ 305 ▲ + 21%

Thousand SESU 123 ▲ + 22%

TOTAL MARKET ADVERTISING SPACE ALLOCATION

Period	ALL MEDIA (SESU Units)* 2007	2006	% Var'n	NEWSPAPERS (Pages) 2007	% Var'n	MAGAZINES (Pages) 2007	% Var'n	TELEVISION (Min) 2007	% Var'n
January	15912	14403	10	6782	-18	1228	15	5307	113
February	17028	12126	40	7217	0	1183	0	5746	108
March	21183	17562	21	9054	26	1174	-6	5878	28
April	21376	15547	37	9087	19	1428	11	6846	128
May	23470	18357	28	9541	13	1555	11	6985	117
June	24869	23231	7	9351	-1	1673	24	8646	18
	123838	**101227**	**22**	**51031**	**6**	**8240**	**9**	**39408**	**68**



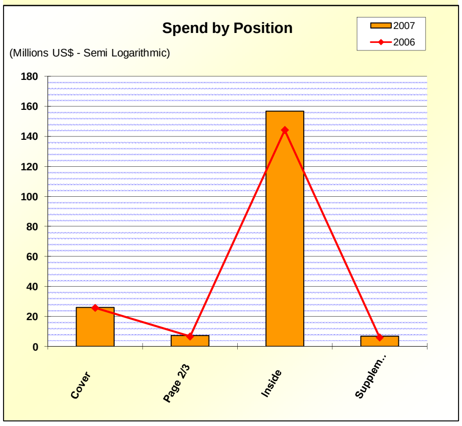


Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

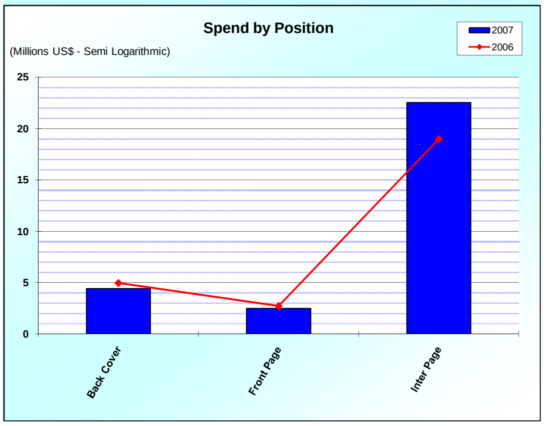
NEWSPAPERS

Spend by Position (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Cover	26	13	26	14	1
Page 2/3	7	4	7	4	8
Inside	157	80	144	79	9
Supplement	7	3	6	3	12
	197	**100**	**183**	**100**	**8**



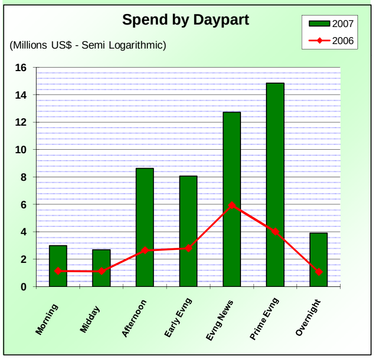
MAGAZINES

Spend by Position (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Back Cover	4	15	5	19	-10
Front Page	2	8	3	10	-8
Inter Page	23	77	19	71	19
	29	**100**	**27**	**100**	**11**



TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Morning	3	6	1	6	162
Midday	3	5	1	6	137
Afternoon	9	16	3	14	226
Early Evng	8	15	3	15	189
Evng News	13	24	6	32	115
Prime Evng	15	28	4	21	271
Overnight	4	7	1	6	262
	54	**100**	**19**	**100**	**188**



TOP 30 LEAGUE OF Y2007 (000 US$)

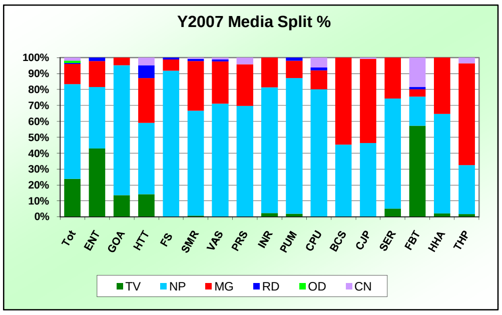
Rank & Brand	JANUARY - JUNE 2007	JANUARY - JUNE 2006	2 YEAR TOTAL	2 YEAR AVG	MEDIA SPLIT % - JAN - JUN 2007 TV	NP	MG	OT*
1 Mcdonald`s	7,626	1,921	9,547	4,773	88.99	1.50	1.80	7.71
2 N.b.k.	3,991	3,298	7,289	3,644	1.09	63.09	6.34	29.46
3 Gulf Bank	3,845	3,066	6,911	3,455	43.67	37.78	6.14	12.40
4 Kuwait Finan.h.	3,182	2,145	5,327	2,663	1.33	76.82	2.67	19.17
5 Demise	2,179	1,753	3,932	1,966	0.00	99.99	0.00	0.00
6 Wataniya Telecom	2,160	3,079	5,239	2,620	0.00	63.62	10.16	26.22
7 Mtc-vodafone	2,109	2,990	5,099	2,550	11.45	30.01	15.62	42.93
8 Toyota	1,985	2,094	4,079	2,040	21.37	64.28	10.70	3.66
9 Etisalat	1,601	0	1,601	800	99.97	0.01	0.01	0.00
10 B.k.m.e.	1,557	3,086	4,643	2,322	0.04	75.38	5.77	18.82
11 Burger King	1,552	1,328	2,880	1,440	2.97	38.68	1.20	57.14
12 Kentucky	1,518	2,008	3,526	1,763	39.77	30.93	2.18	27.13
13 Al Tijari	1,389	1,346	2,735	1,367	0.44	60.00	10.04	29.53
14 Pizza Hut	1,351	973	2,324	1,162	11.27	38.94	1.64	48.12
15 Lexus	1,317	867	2,184	1,092	39.91	50.87	9.19	0.00
16 Mitsubishi	1,300	1,123	2,423	1,212	5.09	66.36	15.74	12.81
17 Nissan	1,297	953	2,250	1,125	1.70	87.94	6.19	4.18
18 Ford	1,140	1,210	2,350	1,175	0.00	79.88	1.23	18.94
19 Kwt.nat.cinema	1,139	988	2,127	1,064	0.00	99.80	0.21	0.00
20 Little Caesar	1,126	1,158	2,284	1,142	71.16	2.50	0.96	25.41
21 Lulu Hyper Markt	1,118	0	1,118	559	0.00	99.94	0.00	0.08
22 Mtc	1,082	395	1,477	738	0.00	21.86	0.00	78.10
23 Al Ahli B.of Kwt	1,046	1,383	2,429	1,215	0.37	65.56	3.99	30.12
24 Dar Al Shifa	1,038	430	1,468	734	0.00	97.15	2.81	0.06
25 Hyundai	1,023	466	1,489	745	0.00	89.62	8.18	2.20
26 Chevrolet	1,017	1,098	2,115	1,057	0.00	94.09	5.90	0.00
27 Toshiba	1,013	219	1,232	616	73.60	26.14	0.27	0.00
28 Burgan Bank	1,009	1,390	2,399	1,199	0.00	53.08	3.58	43.31
29 Hardees	988	1,172	2,160	1,080	5.61	41.63	0.56	52.19
30 Volkswagen	959	258	1,217	608	0.00	94.21	5.70	0.07

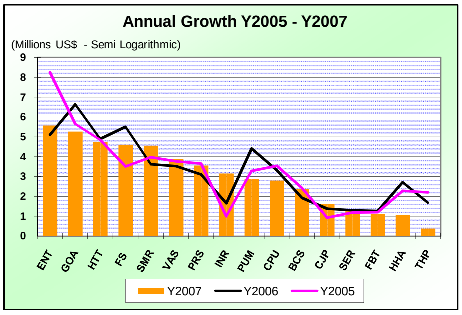
*OT=Radio+OutDoor+Cinema

BAHRAIN - (Jan-June) Y2007

Millions US$ 49 ▼ - 6%

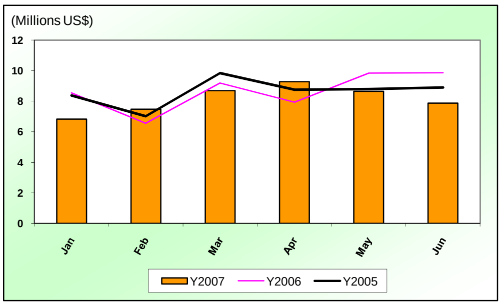
Chapter	Abbreviation	Y2005	Y2006	Y2007	Sh%	%Var'n Y07/06	Media Split % TV	NP	MG	RD	OD	CN
Entertainment	ENT	8	5	6	11	9	43	39	16	2	*	*
Government/Organization Advertising	GOA	6	7	5	11	-21	14	82	5	0	0	0
Hotel, Travel & Tourism	HTT	5	5	5	10	-3	14	45	28	8	0	5
Financial Services	FS	3	6	5	9	-17	0	92	7	1	*	*
Shopping Malls & Retail Stores	SMR	4	4	5	9	26	1	66	31	1	*	1
Vehicles,Accessories & Supply	VAS	4	4	4	8	11	0	71	27	1	*	1
Professional Services	PRS	4	3	4	7	15	0	70	26	*	0	4
Insurance & Real Estate	INR	1	2	3	6	91	2	79	19	0	*	0
Publishig Media	PUM	3	4	3	6	-35	2	85	11	2	*	0
Communications & Public Utilities	CPU	4	3	3	6	-15	*	80	12	2	*	6
Business/Construct Equip. & Supply	BCS	2	2	2	5	25	0	45	55	0	0	0
Clothing,Jewellery & Personal Acs	CJP	1	1	2	3	18	0	46	53	0	*	1
Other Services	SER	1	1	1	3	-2	5	69	26	0	0	0
Food Beverages And Tobacco	FBT	1	1	1	2	-11	57	18	5	1	*	18
Household Appliances	HHA	2	3	1	2	-61	2	62	35	0	0	0
Toiletries Hygiene/ House Care Products	THP	2	2	0	1	-77	2	31	64	0	*	4
Total		**52**	**52**	**49**	**100**	**-6**	**24**	**60**	**13**	**1**	**1**	**2**


Y2007 Media Split %


Annual Growth Y2005 - Y2007

(Millions US$ - Semi Logarithmic)

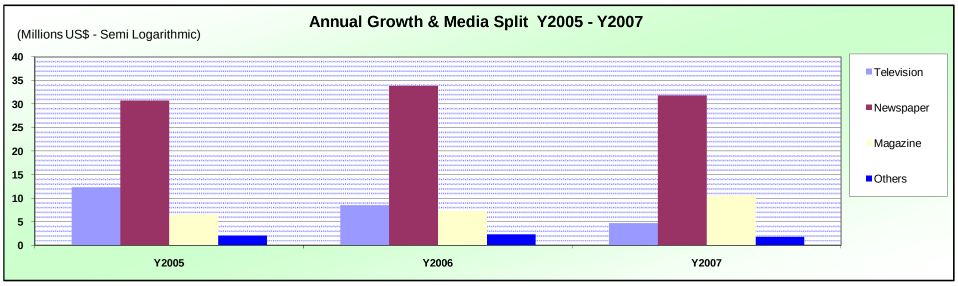
Monthly Spend Analysis (Millions US$)Y2005 - 2007


(Millions US$)

Period	Y2005	Y2006	Y2007	Var'n % Y07/06
Jan	8	9	7	-20
Feb	7	7	7	14
Mar	10	9	9	-6
Apr	9	8	9	17
May	9	10	9	-12
Jun	9	10	8	-20
Total	**52**	**52**	**49**	**-6**

Overall Media Split Analysis (Millions US$)

Media	Y2005 Value	Y2005 Sh%	Y2006 Value	Y2006 Sh%	Y2007 Value	Y2007 Sh%	Var'n % Y2006/2007	Growth Index* Y07	Growth Index* Y06
Television	12	24	8	16	5	10	-45	38	69
Newspaper	31	60	34	65	32	65	-6	103	110
Magazine	7	13	7	14	11	22	44	162	112
Others	2	4	2	4	2	4	-23	85	111
Total	**52**	**100**	**52**	**100**	**49**	**100**	**-6**	**94**	**101**


Annual Growth & Media Split Y2005 - Y2007

(Millions US$ - Semi Logarithmic)

Top Brands Y2007 (000 US$)

Television Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Bah.int`l Circuit	835	53
2	Supreme Cncl.w.	449	N
3	Gulf Incapa.soc.	407	N
4	Bah.equest._h.r.	330	N
5	Al Marai	250	N
6	Pizza Hut	219	N
7	Bigs	168	-43
8	Bahrain Int`l A.	161	N
9	7-up	153	N
10	Pepsi	150	-56
11	Beach Volleyball	122	N
12	Royal Caribbean	116	N

Newspapers Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Batelco	1135	54
2	Mtc-vodafone	681	14
3	Seef_saar_jazira	529	-27
4	Bah.int`l Circuit	507	83
5	Ahli United Bank	433	21
6	Riffa Views	402	-25
7	The Lagoon-bah	379	N
8	Bank Of Bah & Kwt	356	36
9	Gulf Bid	355	-45
10	Chevrolet	352	19
11	Dana Cinema	324	-43
12	Abu Dhabi Inv.h.	275	68

Magazines Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Bah.int`l Circuit	170	142
2	B.m.w.	143	67
3	Mercedes	111	E
4	Batelco	101	89
5	Gulf Bid	95	14
6	Mtc-vodafone	79	39
7	Riffa Views	78	291
8	Gulf Int`l Ind.f	74	N
9	Gulf Exhaust	67	E
10	Dubai Silicon O.	60	N
11	Motorox Cafe	58	61
12	Damas	57	E

Radio Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Gulf Hotel	58	152
2	British Airways	56	-89
3	Bah.int`l Circui	55	101
4	Chilis	47	138
5	Batelco	44	23
6	Bj`s	33	18
7	Club 7	32	298
8	Marina Club	24	E
9	Gulf Air	22	N
10	Motorox Cafe	20	N
11	Bank Of Bah & Kwt	19	N
12	Kia	19	N

Outdoor Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Mtc	6	N
2	Batelco	4	29
3	Mango	2	0
4	Honda	2	N
5	Bank Of Bah & Kwt	2	N
6	Beauty Arabia	2	0
7	Grand Prix	2	N
8	Hsbc	2	N
9	Shamil Bank	2	N
10	Marina View	1	N
11	Brantano Shoe C.	1	N
12	Calvin Klein	1	N

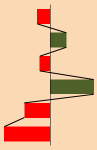
E - Exceeding the limit >300%   N - New

BAHRAIN - (Jan-June) Y2007

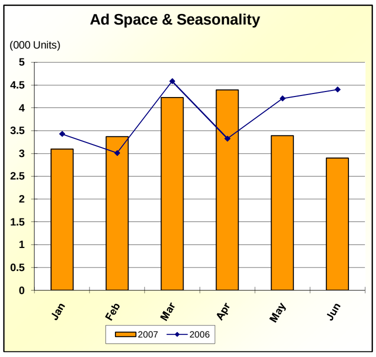
Millions US$ 49 ▼ - 6%

Thousand SESU 21 ▼ - 7%

TOTAL MARKET ADVERTISING SPACE ALLOCATION



Y2007/2006Var %	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
Period	2007	2006	% Var'n	2007	% Var'n	2007	% Var'n	2007	% Var'n
January	3094	3430	-10	1282	-35	502	49	997	39
February	3371	3012	12	1294	29	574	43	1069	-2
March	4227	4586	-8	1395	-10	600	18	1577	-11
April	4396	3327	32	1655	15	703	74	1073	49
May	3393	4207	-19	1621	-3	745	31	391	-70
June	2900	4404	-34	1460	-16	611	43	343	-79
	21381	**22964**	**-7**	**8708**	**-7**	**3734**	**41**	**5450**	**-24**


Ad Space & Seasonality

Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

NEWSPAPERS

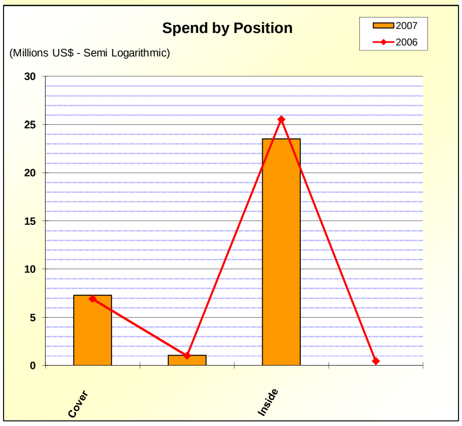
Spend by Position (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Cover	7	23	7	20	6
Page 2/3	1	3	1	3	4
Inside	23	74	26	75	-8
		0	0	1	-100
	32	**100**	**34**	**100**	**-6**

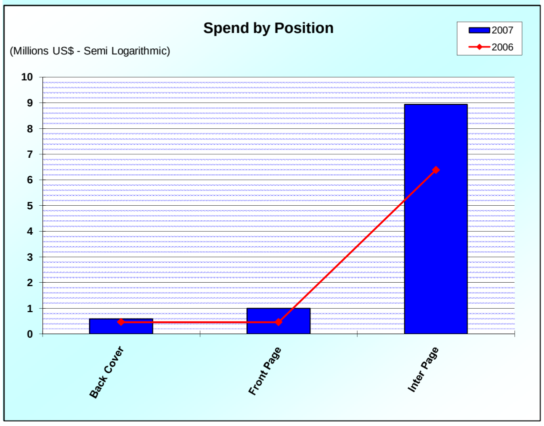
MAGAZINES

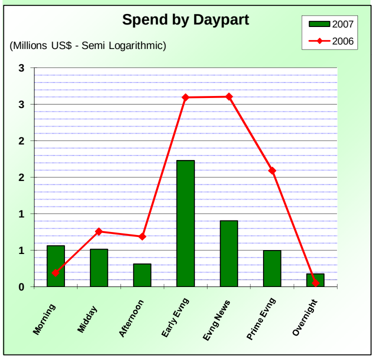
Spend by Position (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Back Cover	1	6	0	6	27
Front Page	1	9	0	6	119
Inter Page	9	85	6	87	40
	11	**100**	**7**	**100**	**44**

TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Morning	1	12	0	2	195
Midday	1	11	1	9	-32
Afternoon	0	7	1	8	-55
Early Evng	2	37	3	31	-33
Evng News	1	19	3	31	-65
Prime Evng	0	11	2	19	-69
Overnight	0	4	0	1	247
	5	**100**	**8**	**100**	**-45**


Spend by Position


Spend by Position


Spend by Daypart

TOP 30 LEAGUE OF Y2007 (000 US$)

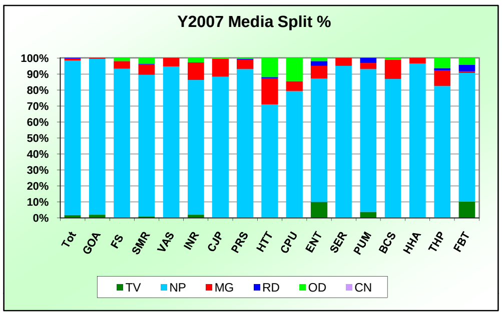
Rank & Brand	JANUARY - JUNE		2 YEAR		MEDIA SPLIT % - JAN - JUN 2007			
	2007	2006	TOTAL	AVG	TV	NP	MG	OT*
1 Bah.int`l Circuit	1,578	943	2,521	1,260	52.91	32.15	10.74	4.18
2 Batelco	1,300	943	2,243	1,121	0.25	87.34	7.77	4.61
3 Mtc-vodafone	765	673	1,438	719	0.00	89.06	10.38	0.52
4 Seef_saar_jazira	530	725	1,255	628	0.00	99.82	0.00	0.25
5 Riffa Views	481	554	1,035	517	0.09	83.56	16.31	0.00
6 Supreme Cncl.w.	470	79	549	274	95.60	4.38	0.00	0.00
7 Ahli United Bank	460	393	853	426	0.00	94.08	3.74	2.10
8 Gulf Bid	450	726	1,176	588	0.00	78.92	21.18	0.00
9 Bank Of Bah & Kwt	415	288	703	351	0.00	85.74	9.26	4.99
10 Gulf Incapa.soc.	407	0	407	204	100.03	0.00	0.00	0.00
11 The Lagoon-bah	392	0	392	196	0.00	96.61	3.49	0.00
12 Chevrolet	379	324	703	352	0.00	92.77	0.00	7.32
13 Dana Cinema	340	578	918	459	0.00	95.18	0.70	4.08
14 Bah.equest._h.r.	333	0	333	167	99.15	0.00	0.00	0.95
15 Bigs	320	458	778	389	52.44	42.78	3.42	1.37
16 Pepsi	319	515	834	417	47.13	0.00	0.00	52.84
17 Al Marai	298	47	345	173	84.04	12.08	4.01	0.00
18 Abu Dhabi Inv.h.	275	255	530	265	0.00	99.85	0.00	0.00
19 Nat`l B.bahrain	274	189	463	231	0.00	92.90	7.00	0.00
20 Hsbc	257	181	438	219	0.00	91.44	5.14	3.27
21 Entrada	244	335	579	290	0.00	100.11	0.00	0.00
22 B.m.w.	236	187	423	212	0.00	39.64	60.51	0.00
23 Pizza Hut	235	43	278	139	93.40	6.56	0.00	0.00
24 Spring Of Cultur	231	347	578	289	37.43	38.87	16.75	7.16
25 Hertz	225	476	701	351	0.00	92.90	7.28	0.00
26 Lg	224	235	459	230	6.29	64.63	23.29	5.80
27 Credi Max	223	157	380	190	0.00	96.70	3.16	0.00
28 Rolex	212	59	271	136	0.00	89.74	10.39	0.00
29 Delmon Univ.	204	186	390	195	0.00	99.90	0.00	0.00
30 Gulf Air	203	513	716	358	0.00	78.30	10.94	10.64

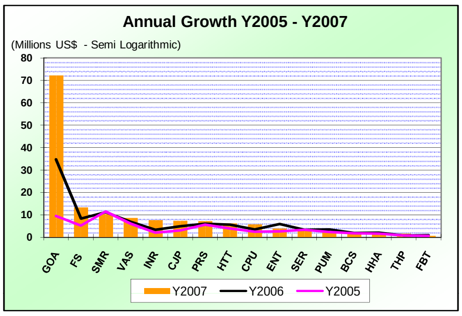
*OT=Radio+OutDoor+Cinema

QATAR - (Jan-June) Y2007

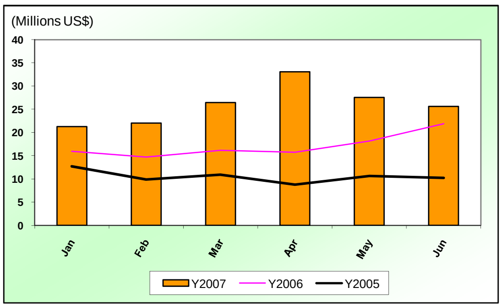
Millions US$ 156 ▲ + 52%

Chapter	Abbreviation	Y2005	Y2006	Y2007	Sh%	%Var'n Y07/06	Media Split % TV	NP	MG	RD	OD	CN
Government/Organization Advertising	GOA	10	35	72	46	108	2	97	1	*	*	0
Financial Services	FS	5	8	13	9	61	*	93	5	*	2	0
Shopping Malls & Retail Stores	SMR	11	11	10	7	-7	1	89	7	1	4	0
Vehicles,Accessories & Supply	VAS	6	7	9	6	25	0	94	5	*	0	0
Insurance & Real Estate	INR	2	3	8	5	134	2	84	11	*	3	0
Clothing,Jewellery & Personal Acs	CJP	3	5	7	5	52	*	88	11	0	1	0
Professional Services	PRS	6	6	7	5	18	*	93	6	1	1	0
Hotel, Travel & Tourism	HTT	4	6	6	4	12	*	71	16	1	12	0
Communications & Public Utilities	CPU	3	4	6	4	67	*	79	6	*	15	0
Entertainment	ENT	3	6	4	3	-33	10	77	8	3	2	0
Other Services	SER	3	3	3	2	4	0	95	5	0	0	0
Publishig Media	PUM	2	3	3	2	-21	4	89	4	3	0	0
Business/Construct Equip. & Supply	BCS	2	2	2	1	24	0	87	12	0	1	0
Household Appliances	HHA	2	2	2	1	-3	0	97	4	0	0	0
Toiletries Hygiene/ House Care Products	THP	1	1	2	1	124	*	82	10	2	6	0
Food Beverages And Tobacco	FBT	1	1	1	0	-18	10	81	1	4	4	0
Total		**63**	**103**	**156**	**100**	**52**	**2**	**97**	**1**	**0**	**0**	**0**





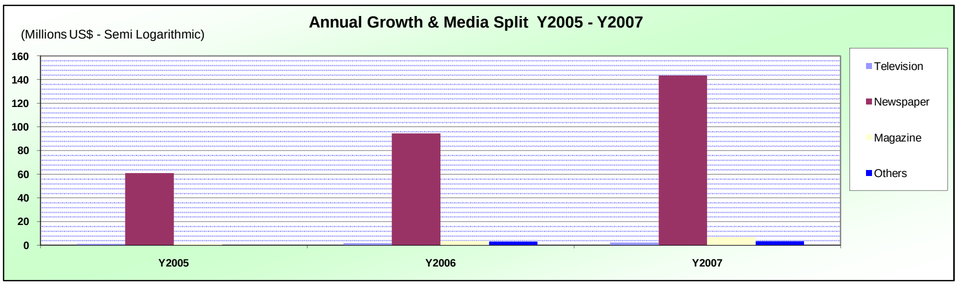
Monthly Spend Analysis (Millions US$)Y2005 - 2007



Period	Y2005	Y2006	Y2007	Var'n % Y07/06
Jan	13	16	21	33
Feb	10	15	22	49
Mar	11	16	26	63
Apr	9	16	33	110
May	11	18	28	51
Jun	10	22	26	17
Total	**63**	**103**	**156**	**52**

Overall Media Split Analysis (Millions US$)

Media	Y2005		Y2006		Y2007		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2006/2007	Y07	Y06
Television	1	2	2	2	2	1	32	211	159
Newspaper	61	97	94	92	143	92	52	236	155
Magazine	1	1	4	3	7	4	92	797	415
Others	0	0	3	3	4	2	9	1847	1693
Total	**63**	**100**	**103**	**100**	**156**	**100**	**52**	**247**	**163**



Top Brands Y2007 (000 US$)

Television Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Supreme Edu.col.	399	N
2	Qatar Orphan Fo.	344	216
3	Doha Songs Fest.	202	69
4	Human Rights W.c	176	N
5	The Pearl Qatar	147	N
6	Zakat Fund	143	E
7	Doha Cultural F.	92	43
8	Ali Bin Ali	81	9
9	Awqaf	79	E
10	Doha Asian Games	73	-76
11	Dar Al Inma	59	N
12	Qatar House	59	N
13	Qatar Red Cresc.	53	E
14	Al Marai	33	N
15	Doha Golf Club	29	N

Newspapers Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Qatar Nat`l Bank	2911	169
2	Q-tel	1700	-6
3	Doha Bank	1518	2
4	Qatar Islamic Bk	1232	E
5	North Atlantic	1204	E
6	The Pearl Qatar	1087	E
7	Al Emadi Hospitl	1056	135
8	Qatar Foundation	977	214
9	Comm.b.of Qatar	906	-25
10	Al Shifa	773	N
11	Kia	688	E
12	Arab Bank	663	230
13	Lulu Hyper Markt	659	E
14	Nissan	631	23
15	Mersal	630	220

Magazines Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Qatar Airways	192	136
2	Q-tel	123	73
3	Qatari Diar	92	24
4	1st Qatar R.e.d.	83	N
5	The Pearl Qatar	76	E
6	Nissan	76	125
7	Consultant Den.c	70	93
8	Rasgas Co.	67	E
9	Bvlgari	63	77
10	Mercedes	62	E
11	Giordano	61	218
12	Omega	61	E
13	Aspire	60	133
14	Qatar	59	245
15	Dolphin Energy	56	106

Radio Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Supreme Edu.col.	191	18
2	Doha Cultural F.	90	-10
3	Pepsi	29	N
4	Emirates Airline	28	E
5	North A.qatar C.	24	N
6	Visa	23	5
7	Q-tel	22	E
8	Gv	19	N
9	Mercedes	18	N
10	Surprise Entert.	15	N
11	Al Massa	13	N
12	Al Mourouj	13	N
13	Arts Exhibition	12	N
14	Pizza Hut	11	N
15	Dubai Co-op Soc.	11	N

E - Exceeding the limit >300%   N - New

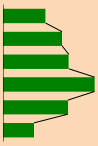
QATAR - (Jan-June) Y2007

Millions US$ 156 ▲ + 52%

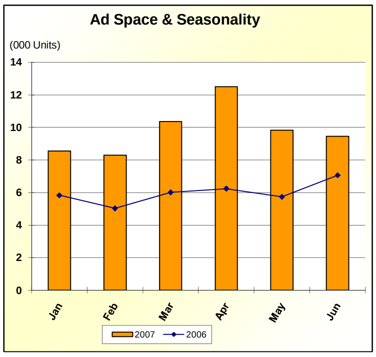
Thousand SESU 59 ▲ + 64%

TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2007/2006Var %



Period	ALL MEDIA (SESU Units)* 2007	ALL MEDIA 2006	ALL MEDIA % Var'n	NEWSPAPERS (Pages) 2007	NEWSPAPERS % Var'n	MAGAZINES (Pages) 2007	MAGAZINES % Var'n	TELEVISION (Min) 2007	TELEVISION % Var'n
January	8557	5835	47	6156	44	406	152	1669	108
February	8304	5041	65	7015	70	368	115	447	-1
March	10353	6015	72	8174	85	457	156	675	46
April	12515	6244	100	10508	157	715	695	860	6
May	9837	5743	71	8574	103	465	-14	441	-11
June	9464	7059	34	7854	49	458	-2	554	18
	59030	**35937**	**64**	**48281**	**83**	**2870**	**78**	**4646**	**33**

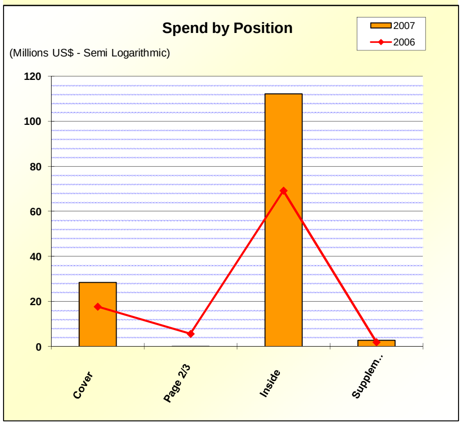


Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

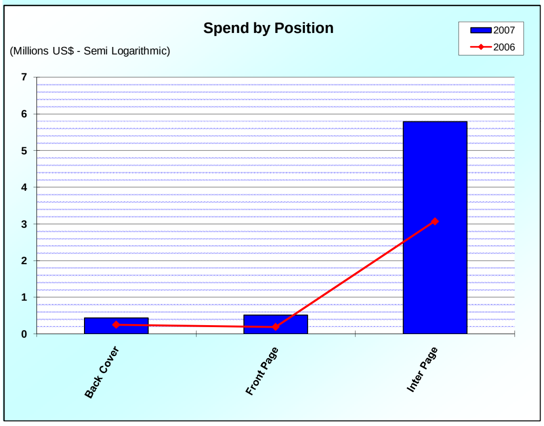
NEWSPAPERS

Spend by Position (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Cover	28	20	18	19	61
Page 2/3	0	0	6	6	-98
Inside	112	78	69	73	62
Supplement	3	2	2	2	46
	143	**100**	**94**	**100**	**52**



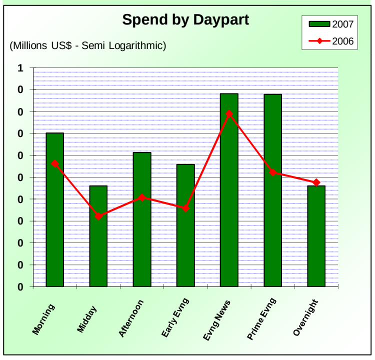
MAGAZINES

Spend by Position (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Back Cover	0	6	0	7	76
Front Page	1	8	0	5	173
Inter Page	6	86	3	88	89
	7	**100**	**4**	**100**	**92**



TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2007 Value	2007 %	2006 Value	2006 %	Var'n %
Morning	0	15	0	16	25
Midday	0	10	0	9	43
Afternoon	0	13	0	12	50
Early Evng	0	12	0	10	56
Evng News	0	19	0	23	12
Prime Evng	0	19	0	15	68
Overnight	0	10	0	14	-3
	2	**100**	**2**	**100**	**32**



TOP 30 LEAGUE OF Y2007 (000 US$)

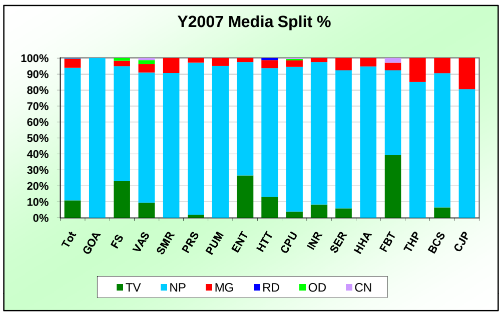
Rank & Brand	JANUARY - JUNE		2 YEAR		MEDIA SPLIT % - JAN - JUN 2007			
	2007	2006	TOTAL	AVG	TV	NP	MG	OT*
1 Qatar Nat`l Bank	2,955	1,099	4,054	2,027	0.02	98.52	1.45	0.00
2 Q-tel	2,599	1,988	4,587	2,294	0.02	65.40	4.75	29.85
3 Doha Bank	1,645	1,510	3,155	1,578	0.00	92.30	1.70	6.00
4 The Pearl Qatar	1,417	156	1,573	787	10.40	76.68	5.40	7.54
5 Qatar Islamic Bk	1,276	183	1,459	729	1.93	96.53	1.50	0.00
6 North Atlantic	1,206	9	1,215	607	0.00	99.85	0.13	0.00
7 Al Emadi Hospitl	1,059	450	1,509	754	0.00	99.67	0.33	0.00
8 Comm.b.of Qatar	996	1,249	2,245	1,123	2.53	90.93	4.47	2.08
9 Qatar Foundation	989	311	1,300	650	0.00	98.81	0.55	0.64
10 Al Shifa	780	0	780	390	0.00	99.08	0.90	0.00
11 Mcdonald`s	740	673	1,413	707	0.00	47.23	2.84	49.96
12 Kia	717	181	898	449	0.00	95.98	3.98	0.00
13 Nissan	707	582	1,289	645	0.00	89.32	10.75	0.00
14 Lulu Hyper Markt	707	63	770	385	0.00	93.25	6.75	0.00
15 Supreme Edu.col.	697	208	905	452	57.26	14.56	0.78	27.38
16 Arab Bank	687	212	899	449	0.00	96.48	3.47	0.00
17 Qatar Airways	644	465	1,109	555	1.04	69.22	29.82	0.00
18 Mersal	630	197	827	413	0.00	99.96	0.00	0.00
19 Al Ahli B.qatar	622	551	1,173	586	0.00	99.99	0.00	0.00
20 Lg	619	460	1,079	540	0.00	63.08	3.75	33.18
21 Ibq	589	266	855	428	0.00	79.06	1.37	19.62
22 Qatar Elect.& W.	581	42	623	312	0.00	99.88	0.14	0.00
23 Qatari Diar	562	353	915	458	0.00	83.62	16.41	0.00
24 Armed Forces	547	23	570	285	0.00	100.04	0.00	0.00
25 Kodak Express	543	1	544	272	0.00	100.07	0.00	0.00
26 Sabban Towers	542	46	588	294	0.00	91.82	8.15	0.00
27 Graphic Arts	525	107	632	316	0.00	100.06	0.00	0.00
28 Int`l Islamic	520	112	632	316	0.00	93.64	6.32	0.00
29 Ford	512	214	726	363	0.00	99.99	0.00	0.00
30 Icc Cricket W.c.	504	0	504	252	0.00	100.05	0.00	0.00

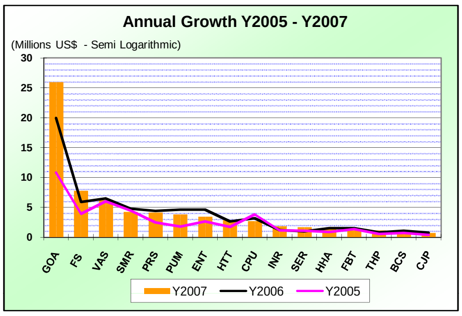
*OT=Radio+OutDoor+Cinema

OMAN - (Jan-June) Y2007

Millions US$ 71 ▲ + 9%

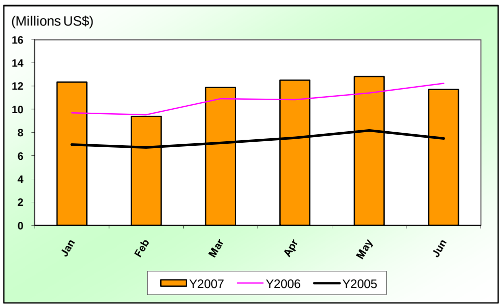
Chapter	Abbreviation	Y2005	Y2006	Y2007	Sh%	%Var'n Y07/06	TV	NP	MG	RD	OD	CN
							Media Split %					
Government/Organization Advertising	GOA	11	20	26	37	30	*	99	*	0	0	0
Financial Services	FS	4	6	8	11	32	23	71	4	*	2	*
Vehicles,Accessories & Supply	VAS	6	6	6	9	-4	10	81	5	*	2	1
Shopping Malls & Retail Stores	SMR	4	5	4	6	-11	*	90	9	0	0	*
Professional Services	PRS	2	4	4	6	-6	2	95	3	0	0	*
Publishig Media	PUM	2	5	4	5	-18	0	95	5	0	0	0
Entertainment	ENT	3	5	3	5	-25	27	71	3	0	0	0
Hotel, Travel & Tourism	HTT	2	3	3	4	8	13	80	5	1	0	*
Communications & Public Utilities	CPU	4	3	3	4	-15	4	90	4	0	1	1
Insurance & Real Estate	INR	1	1	2	3	56	8	89	3	0	0	0
Other Services	SER	1	1	2	2	71	6	87	8	0	0	0
Household Appliances	HHA	1	2	2	2	4	0	95	5	0	0	0
Food Beverages And Tobacco	FBT	1	2	1	2	-21	39	53	5	0	0	3
Toiletries Hygiene/ House Care Products	THP	1	1	1	2	38	0	85	15	0	0	0
Business/Construct Equip. & Supply	BCS	1	1	1	2	1	7	84	10	0	0	0
Clothing,Jewellery & Personal Acs	CJP	0	1	1	1	-3	0	81	20	0	0	0
Total		**44**	**65**	**71**	**100**	**9**	**11**	**83**	**6**	**0**	**0**	**0**


Y2007 Media Split %


Annual Growth Y2005 - Y2007

(Millions US$ - Semi Logarithmic)

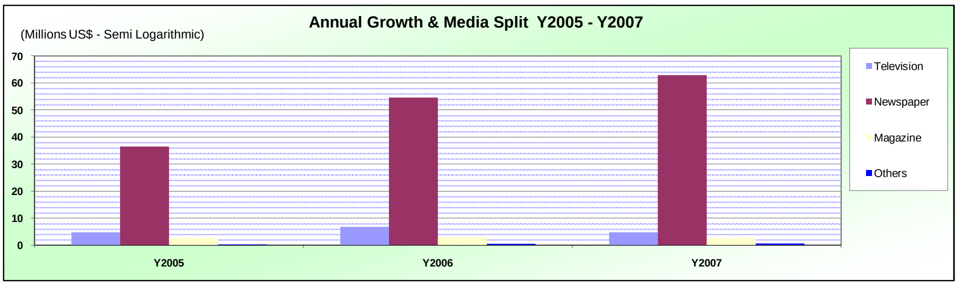
Monthly Spend Analysis (Millions US$)Y2005 - 2007



Period	Y2005	Y2006	Y2007	Var'n % Y07/06
Jan	7	10	12	27
Feb	7	10	9	-2
Mar	7	11	12	9
Apr	8	11	13	15
May	8	11	13	12
Jun	7	12	12	-4
Total	**44**	**65**	**71**	**9**

Overall Media Split Analysis (Millions US$)

Media	Y2005		Y2006		Y2007		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2006/2007	Y07	Y06
Television	5	11	7	10	5	7	-29	100	141
Newspaper	37	83	55	84	63	89	15	172	150
Magazine	2	6	3	4	2	4	-14	102	119
Others	0	1	0	1	1	1	29	217	169
Total	**44**	**100**	**65**	**100**	**71**	**100**	**9**	**161**	**147**


Annual Growth & Media Split Y2005 - Y2007

(Millions US$ - Semi Logarithmic)

Top Brands Y2007 (000 US$)

Television Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Oman Int`l Bank	702	72
2	Muscat Festival	473	51
3	Bank Muscat	470	1
4	Bank Dhofar	431	10
5	Gulf Air	323	-23
6	Muscat Int.bk.f.	292	8
7	Subaru	234	N
8	Dtz Qatar	157	N
9	Lacnor	133	209
10	Mountain Dew	103	47
11	Regal Picon	99	104
12	Badr Al Samaa	99	N
13	Toyota	98	-35
14	Oman Oil Company	89	N
15	Aquafina	86	-20

Newspapers Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Oman Mobile	1120	E
2	Muscat Festival	1103	16
3	Bank Muscat	788	-33
4	Toyota	783	-14
5	Nat`l B.oman	727	80
6	Nawras Telecom	714	-59
7	Global Inv.house	606	E
8	Port Of Salalah	585	67
9	Oman Tel	478	-33
10	Lulu Hyper Markt	456	-5
11	Bank Dhofar	402	25
12	Nissan	387	20
13	Diwan Of Royal C	333	12
14	Kia	287	-35
15	Oman Nat`l T.co.	285	35

Magazines Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Nat`l B.oman	70	9
2	Markaz Al Bahja	58	N
3	Badr Al Samaa	49	E
4	Oman Mobile	48	E
5	Sadolin	41	172
6	Toyota	39	-39
7	Mercedes	39	-46
8	Nawras Telecom	34	-42
9	Oman Int`l Bank	34	-3
10	Muscat Eye Laser	34	E
11	Nissan	33	-39
12	Oman Arab Bank	31	4
13	City Center	29	E
14	A`saffa	28	2
15	Infiniti	27	E

Outdoor Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Toyota	91	207
2	Oman Int`l Bank	74	E
3	Nat`l B.oman	58	E
4	Nissan	39	N
5	Oman Mobile	27	E
6	Kia	7	225
7	Oman Lng	7	50
8	Hummer	5	N

E - Exceeding the limit >300% N - New

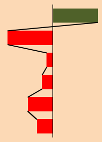
OMAN - (Jan-June) Y2007

Millions US$ 71 ▲ + 9%

Thousand SESU 27 ▼ - 6%

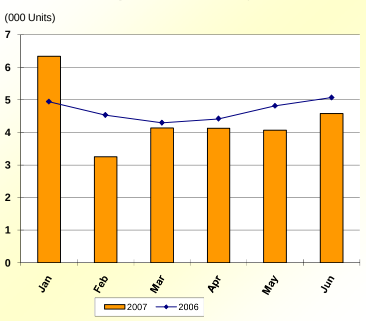
TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2007/2006Var %



Period	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
	2007	2006	% Var'n	2007	% Var'n	2007	% Var'n	2007	% Var'n
January	6342	4949	28	3035	-6	224	-30	2048	52
February	3259	4539	-28	2434	-13	225	-19	401	-70
March	4143	4300	-4	3483	12	157	-56	428	-48
April	4130	4422	-7	3370	7	225	-40	412	-53
May	4071	4820	-16	3480	2	388	14	167	-84
June	4581	5076	-10	2996	-20	262	-14	1287	29
	26526	**28106**	**-6**	**18799**	**-3**	**1481**	**-25**	**4744**	**-26**

Ad Space & Seasonality



Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

NEWSPAPERS

Spend by Position (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Cover	6	9	5	10	0
Page 2/3	0	0	0	0	9
Inside	57	91	49	89	17
Supplement	0	0	0	1	-78
	63	**100**	**55**	**100**	**15**

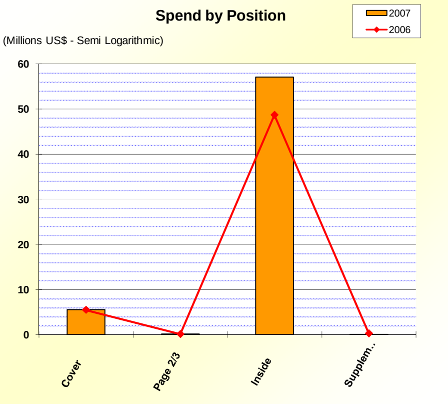
MAGAZINES

Spend by Position (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Back Cover	0	18	1	18	-15
Front Page	0	9	0	11	-26
Inter Page	2	72	2	71	-12
	2	**100**	**3**	**100**	**-14**

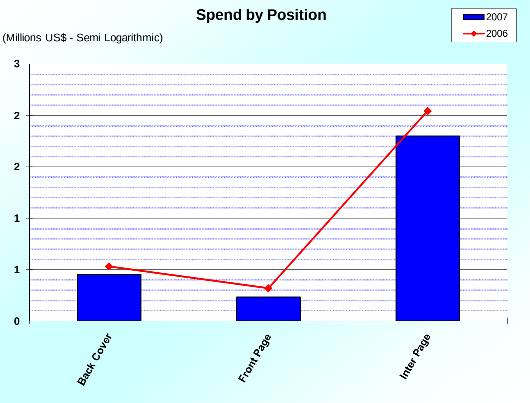
TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Morning	0	7	1	11	-53
Midday	0	6	0	7	-35
Afternoon	0	8	1	9	-37
Early Evng	1	14	1	13	-26
Evng News	2	36	2	26	-2
Prime Evng	1	13	1	16	-43
Overnight	1	16	1	19	-39
	5	**100**	**7**	**100**	**-29**

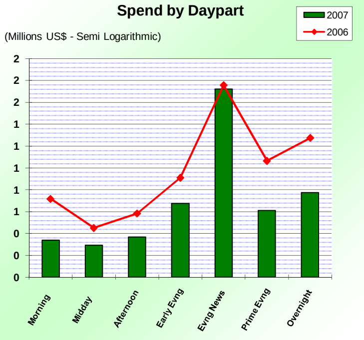
Spend by Position



Spend by Position



Spend by Daypart



TOP 30 LEAGUE OF Y2007 (000 US$)

Rank & Brand	JANUARY - JUNE		2 YEAR		MEDIA SPLIT % - JAN - JUN 2007			
	2007	2006	TOTAL	AVG	TV	NP	MG	OT*
1 Muscat Festival	1,584	1,281	2,865	1,433	29.87	69.60	0.55	0.00
2 Bank Muscat	1,312	1,851	3,163	1,581	35.81	60.08	0.98	3.12
3 Oman Mobile	1,213	316	1,529	764	0.00	92.36	3.96	3.66
4 Toyota	1,059	1,198	2,257	1,129	9.21	73.95	3.70	13.16
5 Oman Int`l Bank	1,053	954	2,007	1,003	66.65	23.09	3.19	7.06
6 Nat`l B.oman	871	504	1,375	688	0.00	83.52	8.08	8.42
7 Bank Dhofar	836	740	1,576	788	51.60	48.11	0.31	0.00
8 Nawras Telecom	821	2,080	2,901	1,450	8.85	86.98	4.14	0.00
9 Global Inv.house	606	46	652	326	0.00	100.04	0.00	0.00
10 Port Of Salalah	585	351	936	468	0.00	99.97	0.00	0.00
11 Oman Tel	527	877	1,404	702	6.45	90.69	2.82	0.00
12 Nissan	475	378	853	426	0.00	81.46	6.94	11.50
13 Subaru	462	185	647	324	50.60	49.11	0.38	0.00
14 Lulu Hyper Markt	461	483	944	472	0.00	98.92	1.09	0.00
15 Gulf Air	412	814	1,226	613	78.52	14.97	0.00	6.39
16 Kia	355	565	920	460	12.14	80.92	5.13	1.85
17 Oman Air	341	165	506	253	15.24	81.58	0.00	3.20
18 Diwan Of Royal C	333	298	631	316	0.00	100.03	0.00	0.00
19 Muscat Int.bk.f.	311	272	583	291	93.94	6.01	0.00	0.00
20 Oman Arab Bank	296	178	474	237	0.00	89.71	10.31	0.00
21 Oman Nat`l T.co.	285	211	496	248	0.00	100.14	0.00	0.00
22 United Finance C	266	12	278	139	0.00	99.44	0.38	0.00
23 The Wave Muscat	259	0	259	129	0.00	94.02	5.87	0.00
24 Bank Sohar	237	0	237	119	0.00	93.94	6.19	0.00
25 Vision Inv.serv.	234	0	234	117	0.00	93.10	6.72	0.00
26 Mitsubishi	230	261	491	245	13.71	75.54	10.67	0.00
27 Samsung	229	173	402	201	0.00	90.75	9.41	0.00
28 Hyundai	228	732	960	480	11.47	87.16	1.55	0.00
29 United Secur.co.	222	404	626	313	0.00	99.79	0.00	0.00
30 Zawaia	217	0	217	108	0.00	99.81	0.00	0.00

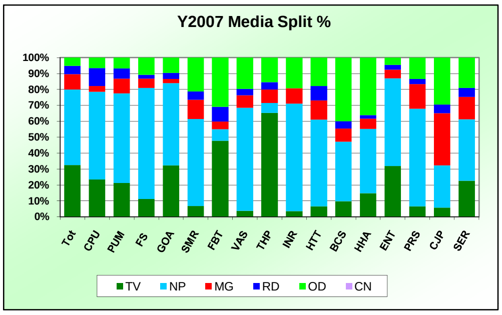
*OT=Radio+OutDoor+Cinema

LEVANT* MEDIA MARKETS (Jan-June) Y2007

Millions US$ 564 ▲ + 3%

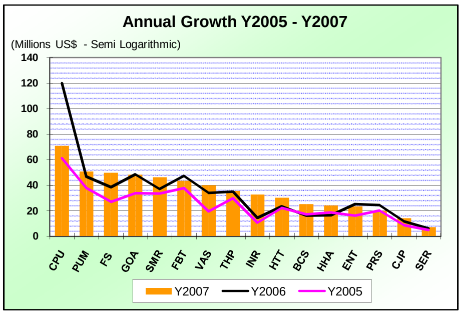
Chapter	Abbreviation	Y2005	Y2006	Y2007	Sh%	%Var'n Y07/06	Media Split % TV	NP	MG	RD	OD	CN
Communications & Public Utilities	CPU	61	120	71	13	-41	24	55	4	11	7	0
Publishig Media	PUM	38	47	51	9	9	21	56	9	6	7	0
Financial Services	FS	27	39	50	9	29	11	70	6	3	11	0
Government/Organization Advertising	GOA	34	48	48	9	0	32	52	3	4	10	0
Shopping Malls & Retail Stores	SMR	34	37	46	8	25	7	55	12	5	21	0
Food Beverages And Tobacco	FBT	38	47	44	8	-8	48	7	5	9	31	0
Vehicles,Accessories & Supply	VAS	20	34	40	7	18	4	65	8	4	20	0
Toiletries Hygiene/ House Care Products	THP	30	35	36	6	2	65	6	8	5	15	0
Insurance & Real Estate	INR	11	14	33	6	129	4	67	10	*	19	0
Hotel, Travel & Tourism	HTT	22	23	30	5	29	7	54	12	9	18	0
Business/Construct Equip. & Supply	BCS	17	16	25	4	57	10	37	8	5	40	0
Household Appliances	HHA	19	16	24	4	48	15	40	7	2	36	0
Entertainment	ENT	16	25	24	4	-6	32	55	5	3	5	0
Professional Services	PRS	20	24	20	4	-19	7	61	15	3	14	0
Clothing,Jewellery & Personal Acs	CJP	9	12	14	3	23	6	27	33	5	30	0
Other Services	SER	5	6	7	1	19	23	39	14	6	19	0
Total		**400**	**545**	**564**	**100**	**3**	**33**	**47**	**10**	**5**	**5**	**0**

Y2007 Media Split %

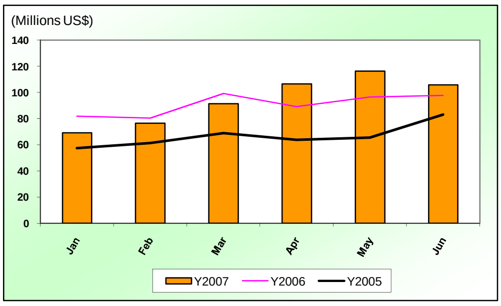


Annual Growth Y2005 - Y2007

(Millions US$ - Semi Logarithmic)



Monthly Spend Analysis (Millions US$)Y2005 - 2007



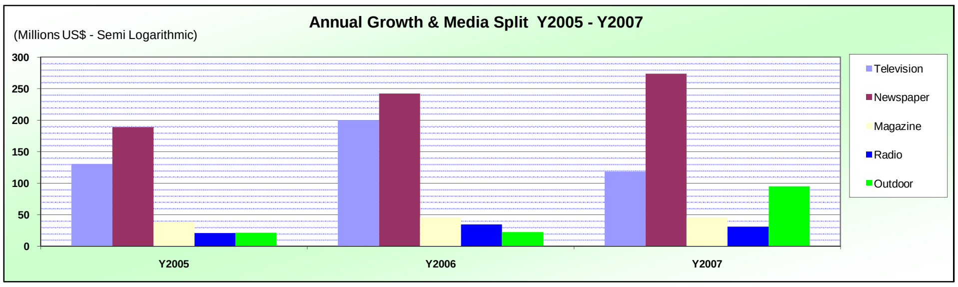
Period	Y2005	Y2006	Y2007	Var'n % Y07/06
Jan	57	82	69	-15
Feb	61	81	76	-5
Mar	69	99	91	-8
Apr	64	89	107	19
May	65	96	116	21
Jun	83	98	106	8
Total	**400**	**545**	**564**	**3**

Overall Media Split Analysis (Millions US$)

Media	Y2005		Y2006		Y2007		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2006/2007	Y07	Y06
Television	130	33	200	37	118	21	-41	91	153
Newspaper	189	47	242	44	274	49	13	145	128
Magazine	39	10	46	8	46	8	0	119	119
Radio	21	5	34	6	31	6	-10	149	165
Outdoor	21	5	22	4	95	17	327	451	106
Total	**400**	**100**	**545**	**100**	**564**	**100**	**3**	**141**	**136**

Annual Growth & Media Split Y2005 - Y2007

(Millions US$ - Semi Logarithmic)



Top Brands Y2007 (000 US$)

Television Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Coca Cola	6778	17
2	Pantene	5276	38
3	Pepsi	4327	-40
4	Head & Shoulders	3041	11
5	Ariel	3039	-10
6	Byblos	2911	-44
7	Etisalat	2894	N
8	Chahed Chaf Kol	2597	N
9	Crest	2594	23
10	Mouwaten Loubnan	2499	N
11	Tide	2457	-7
12	Net Vision	2382	42

Newspapers Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Mobinil	7208	-7
2	Arab Bank	6863	262
3	Vodafone	6314	49
4	Telecom Egypt	4426	187
5	Nat`l B.egypt	4177	-3
6	Etisalat	4133	E
7	Theatre Art.hse.	2905	113
8	Emaar	2493	E
9	Al Masreya	1964	63
10	Fastlink	1960	57
11	Egypt Air	1936	38
12	Mobilecom	1828	93

Magazines Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Mobinil	531	-10
2	Vodafone	449	E
3	S.t.dupont	309	97
4	Egypt Air	276	-1
5	Rolex	237	53
6	Nokia	225	14
7	Telecom Egypt	219	-27
8	Degla Real S.inv	209	E
9	Mercedes	204	39
10	Toyota	201	-52
11	Jeep	199	83
12	Virgin Megastore	187	-31

Radio Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Vodafone	1480	30
2	Mobinil	930	4
3	Etisalat	695	N
4	Lipton	547	E
5	Pepsi	494	60
6	Coca Cola	448	13
7	Telecom Egypt	409	114
8	Chevrolet	379	92
9	President	358	186
10	Aramex	349	26
11	Mcdonald`s	304	26
12	Kentucky	293	117

Outdoor Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Vodafone	1617	E
2	Mobinil	1228	N
3	Nouval	1090	N
4	Talaat Moustaf.group	1089	N
5	Coca Cola	974	E
6	Toshiba	860	E
7	Pepsi	774	278
8	Nokia	710	E
9	Nestle	652	E
10	Qatar Airways	625	E
11	I Love Life	615	N
12	Kentucky	598	-9

E - Exceeding the limit >300%   N - New

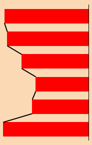
LEVANT* MEDIA MARKETS (Jan-June) Y2007

Millions US$ 564 ▲ + 3%

Thousand SESU 522 ▼ - 32%

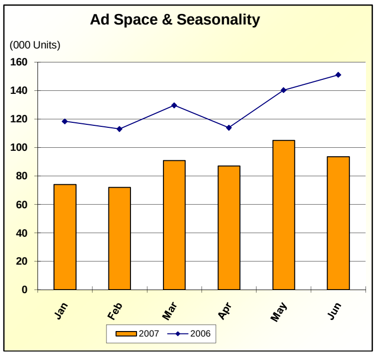
TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2007/2006Var %



Period	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
	2007	2006	% Var'n	2007	% Var'n	2007	% Var'n	2007	% Var'n
January	73861	118303	-38	4936	3	4373	-4	23957	-54
February	71922	112969	-36	5958	3	4933	18	25018	-46
March	90803	129560	-30	7518	3	4999	9	27454	-56
April	86948	113863	-24	7753	15	5624	8	27403	-36
May	105023	140190	-25	9867	30	5533	16	29885	-51
June	93405	150998	-38	9065	27	5714	25	26932	-57
	521961	**765883**	**-32**	**45095**	**15**	**31176**	**12**	**160650**	**-51**

Ad Space & Seasonality



Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

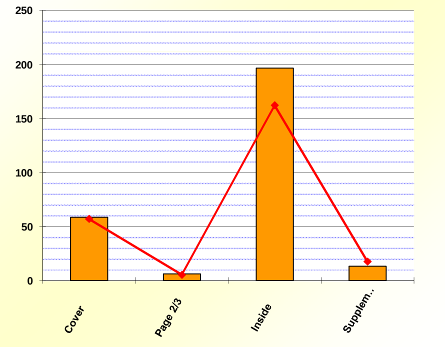
* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

NEWSPAPERS

Spend by Position (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Cover	59	21	57	24	3
Page 2/3	6	2	5	2	17
Inside	196	72	162	67	21
Supplement	13	5	18	7	-24
	274	**100**	**242**	**100**	**13**

Spend by Position

(Millions US$ - Semi Logarithmic)

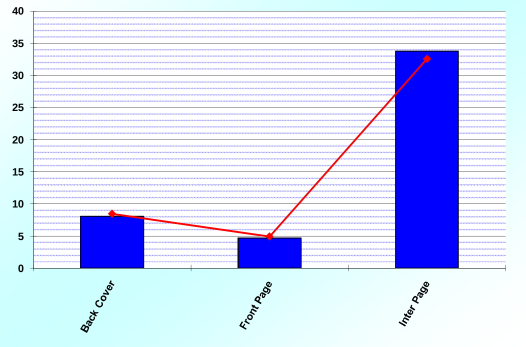


MAGAZINES

Spend by Position (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Back Cover	8	18	8	18	-4
Front Page	5	10	5	11	-5
Inter Page	34	74	33	71	4
	46	**100**	**46**	**100**	**0**

Spend by Position

(Millions US$ - Semi Logarithmic)

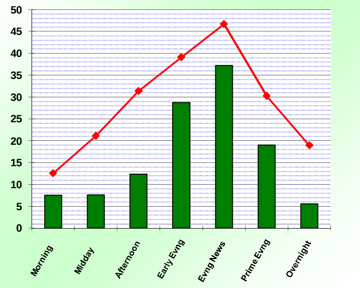


TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Morning	8	6	13	6	-40
Midday	8	6	21	11	-64
Afternoon	12	10	31	16	-61
Early Evng	29	24	39	20	-26
Evng News	37	32	47	23	-20
Prime Evng	19	16	30	15	-37
Overnight	6	5	19	9	-71
	118	**100**	**200**	**100**	**-41**

Spend by Daypart

(Millions US$ - Semi Logarithmic)



TOP 30 LEAGUE OF Y2007 (000 US$)

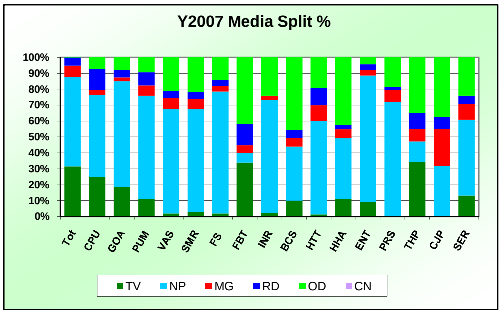
Rank & Brand	JANUARY - JUNE		2 YEAR		MEDIA SPLIT % - JAN - JUN 2007			
	2007	2006	TOTAL	AVG	TV	NP	MG	OT*
1 Vodafone	12,036	7,570	19,606	9,803	18.08	52.46	3.73	25.73
2 Mobinil	11,762	11,196	22,958	11,479	15.86	61.28	4.51	18.35
3 Coca Cola	8,473	7,163	15,636	7,818	80.00	2.67	0.55	16.78
4 Etisalat	8,177	21	8,198	4,099	35.39	50.54	1.77	12.29
5 Arab Bank	7,185	2,028	9,213	4,607	0.00	95.52	2.32	2.16
6 Pepsi	5,991	9,161	15,152	7,576	72.23	5.61	1.00	21.17
7 Telecom Egypt	5,687	2,030	7,717	3,859	3.18	77.83	3.85	15.14
8 Pantene	5,528	4,007	9,535	4,768	95.44	0.04	2.12	2.41
9 Nat`l B.egypt	4,383	5,173	9,556	4,778	0.00	95.30	1.85	2.85
10 Ariel	3,321	3,619	6,940	3,470	91.51	1.81	0.09	6.59
11 Byblos	3,287	5,618	8,905	4,453	88.56	4.84	1.16	5.45
12 Banque Audi	3,265	1,664	4,929	2,465	60.43	19.45	3.06	17.06
13 Head & Shoulders	3,174	2,862	6,036	3,018	95.81	0.00	0.19	4.00
14 Talaat Moustaf.g	2,989	0	2,989	1,495	18.50	44.43	0.10	36.97
15 Theatre Art.hse.	2,935	1,363	4,298	2,149	0.55	98.98	0.48	0.00
16 Tide	2,621	2,656	5,277	2,639	93.74	2.06	0.00	4.20
17 Egypt Air	2,603	1,687	4,290	2,145	2.50	74.38	10.60	12.52
18 Chahed Chaf Kol	2,597	0	2,597	1,299	100.00	0.00	0.00	0.00
19 Crest	2,594	2,296	4,890	2,445	100.00	0.00	0.00	0.00
20 Banque Misr	2,590	1,184	3,774	1,887	9.38	65.25	2.28	23.09
21 Emaar	2,528	265	2,793	1,397	0.00	98.62	1.38	0.00
22 Mouwaten Loubnan	2,499	0	2,499	1,250	100.00	0.00	0.00	0.00
23 Nokia	2,478	2,224	4,702	2,351	7.95	45.92	9.08	37.05
24 I Love Life	2,476	0	2,476	1,238	74.72	0.00	0.12	25.16
25 Pampers	2,431	2,190	4,621	2,311	89.92	3.29	1.69	5.10
26 Net Vision	2,414	1,732	4,146	2,073	98.67	0.00	0.00	1.33
27 Gillette	2,346	856	3,202	1,601	87.98	0.00	2.51	9.51
28 Hyundai	2,340	2,769	5,109	2,555	9.15	76.41	1.58	12.86
29 Persil	2,340	2,614	4,954	2,477	71.97	1.84	0.00	26.20
30 All Prints	2,286	280	2,566	1,283	100.00	0.00	0.00	0.00

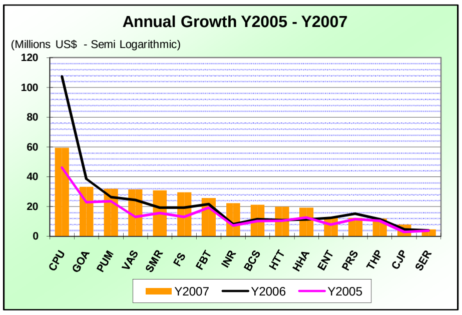
*OT=Radio+OutDoor+Cinema

EGYPT* - (Jan-June) Y2007

Millions US$ 375 ▲ + 8%

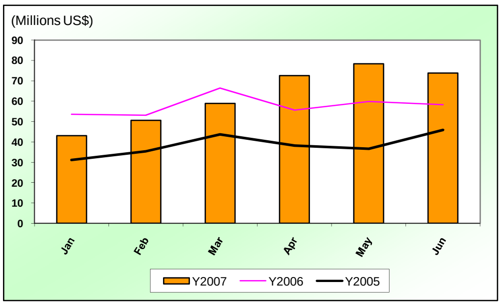
Chapter	Abbreviation	Y2005	Y2006	Y2007	Sh%	%Var'n Y07/06	Media Split % TV	NP	MG	RD	OD	CN
Communications & Public Utilities	CPU	46	107	59	16	-45	25	52	3	13	7	0
Government/Organization Advertising	GOA	23	39	33	9	-14	18	67	3	5	8	0
Publishig Media	PUM	24	26	32	9	21	11	65	7	8	9	0
Vehicles,Accessories & Supply	VAS	13	24	32	8	29	2	66	7	5	21	0
Shopping Malls & Retail Stores	SMR	16	19	31	8	60	3	65	6	4	22	0
Financial Services	FS	13	19	30	8	53	2	77	4	4	14	0
Food Beverages And Tobacco	FBT	19	22	26	7	20	34	6	5	13	42	0
Insurance & Real Estate	INR	7	8	22	6	172	3	70	3	*	24	0
Business/Construct Equip. & Supply	BCS	10	12	21	6	83	10	34	5	5	46	0
Hotel, Travel & Tourism	HTT	11	11	20	5	83	2	59	10	11	19	0
Household Appliances	HHA	13	11	19	5	70	11	38	6	3	43	0
Entertainment	ENT	8	12	13	3	2	9	79	4	4	5	0
Professional Services	PRS	11	15	12	3	-19	*	72	7	2	18	0
Toiletries Hygiene/ House Care Products	THP	10	12	12	3	5	34	13	8	10	35	0
Clothing,Jewellery & Personal Acs	CJP	3	5	8	2	71	*	32	23	8	37	0
Other Services	SER	4	4	5	1	18	13	48	10	5	24	0
Total		**231**	**347**	**375**	**100**	**8**	**32**	**56**	**7**	**5**	**0**	**0**


Y2007 Media Split %


Annual Growth Y2005 - Y2007

(Millions US$ - Semi Logarithmic)

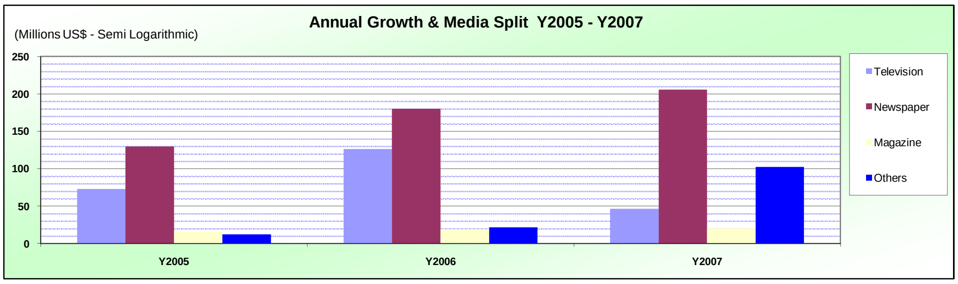
Monthly Spend Analysis (Millions US$)Y2005 - 2007



Period	Y2005	Y2006	Y2007	Var'n % Y07/06
Jan	31	54	43	-20
Feb	35	53	51	-5
Mar	44	67	59	-11
Apr	38	56	73	30
May	37	60	78	31
Jun	46	58	74	27
Total	**231**	**347**	**375**	**8**

Overall Media Split Analysis (Millions US$)

Media	Y2005		Y2006		Y2007		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2006/2007	Y07	Y06
Television	73	32	126	36	47	12	-63	64	173
Newspaper	130	56	180	52	205	55	14	159	139
Magazine	16	7	19	6	21	5	7	126	118
Others	12	5	22	6	103	27	374	828	175
Total	**231**	**100**	**347**	**100**	**375**	**100**	**8**	**162**	**150**


Annual Growth & Media Split Y2005 - Y2007

(Millions US$ - Semi Logarithmic)

Top Brands Y2007 (000 US$)

Television Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Etisalat	2894	N
2	Net Vision	2382	42
3	Vodafone	2176	7
4	Mobinil	1865	-6
5	Constitute C.f.	1545	252
6	Coca Cola	1203	-10
7	Cleopatra	1022	E
8	Chipsy	920	59
9	Conprehensive H.	779	-46
10	Ariel	626	-13
11	Pepsi	579	-79
12	Ranin	577	-79

Newspapers Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Mobinil	7208	-7
2	Vodafone	6314	49
3	Telecom Egypt	4426	187
4	Nat`l B.egypt	4177	-3
5	Etisalat	4132	E
6	Arab Bank	3498	E
7	Theatre Art.hse.	2905	113
8	Emaar	2281	E
9	Al Masreya	1964	63
10	Egypt Air	1905	39
11	Banque Misr	1690	58
12	Hyundai	1603	-20

Magazines Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Mobinil	524	-12
2	Vodafone	449	E
3	Egypt Air	272	0
4	Telecom Egypt	219	-26
5	Degla Real S.inv	209	E
6	Jeep	194	77
7	Mercedes	183	78
8	Toyota	179	-49
9	Rolex	179	79
10	Kiriazi	150	-7
11	Mazzika	148	-5
12	Etisalat	145	E

Radio Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Vodafone	1480	30
2	Mobinil	930	4
3	Etisalat	695	N
4	Lipton	547	E
5	Pepsi	421	84
6	Telecom Egypt	409	115
7	Coca Cola	405	2
8	Chevrolet	379	110
9	President	358	188
10	Aramex	349	26
11	Mcdonald`s	304	56
12	7-up	271	32

Outdoor Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Vodafone	1617	E
2	Mobinil	1228	N
3	Nouval	1090	N
4	Talaat Moustaf.group	1089	N
5	Toshiba	802	N
6	Nestle	652	N
7	Qatar Airways	613	N
8	Coca Cola	602	N
9	Misr Insurance	583	N
10	I2	578	E
11	Universal	563	N
12	Kiriazi	562	N

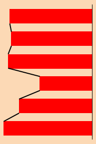
E - Exceeding the limit >300%   N - New

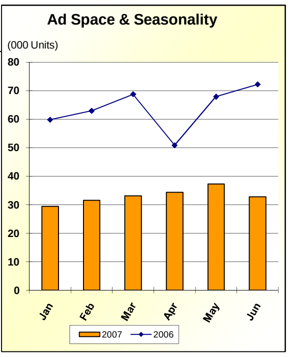
Millions US$ 375 ▲ + 8%
Thousand SESU 199 ▼ - 48%

EGYPT* - (Jan-June) Y2007

TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2007/2006Var %	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)		OD - Metro
Period	**2007**	**2006**	**% Var'n**	**2007**	**% Var'n**	**2007**	**% Var'n**	**2007**	**% Var'n**	
January	29401	59826	-51	1799	4	2119	5	9664	-67	9056
February	31591	62932	-50	2199	21	2821	48	9636	-64	8758
March	33098	68740	-52	2668	4	2755	40	8207	-77	10021
April	34429	50841	-32	2359	22	2887	44	6747	-63	13446
May	37308	67894	-45	2635	27	2718	34	8898	-75	14963
June	32823	72192	-55	2986	75	3033	103	4960	-86	11364
	198651	**382424**	**-48**	**14646**	**24**	**16333**	**43**	**48112**	**-73**	**67608**



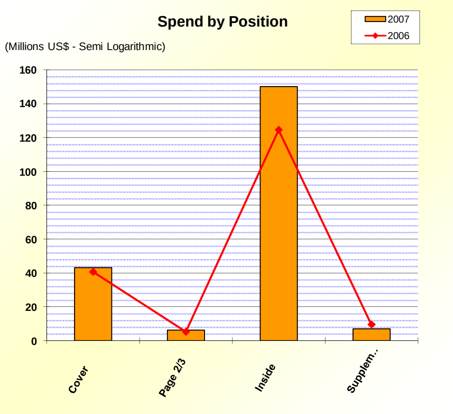

Ad Space & Seasonality

Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

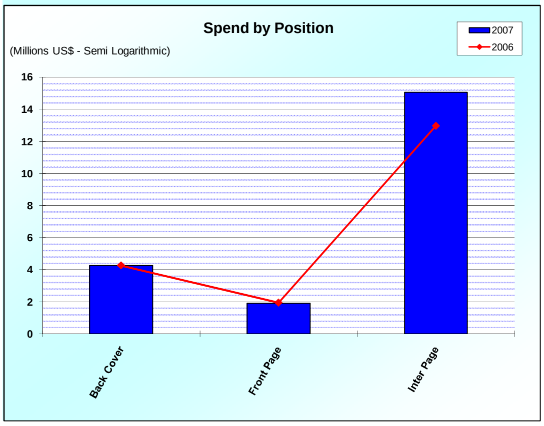
NEWSPAPERS

Spend by Position (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Cover	43	21	41	23	6
Page 2/3	6	3	5	3	15
Inside	150	73	125	69	21
Supplement	7	3	10	5	-27
	205	**100**	**180**	**100**	**14**


Spend by Position
(Millions US$ - Semi Logarithmic)

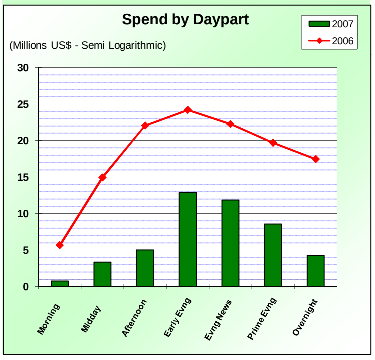
MAGAZINES

Spend by Position (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Back Cover	4	21	4	22	0
Front Page	2	9	2	10	-2
Inter Page	15	73	13	68	16
	21	**100**	**19**	**100**	**7**


Spend by Position
(Millions US$ - Semi Logarithmic)

TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2007		2006		Var'n %
	Value	%	Value	%	
Morning	1	2	6	4	-87
Midday	3	7	15	12	-78
Afternoon	5	11	22	17	-77
Early Evng	13	28	24	19	-47
Evng News	12	25	22	18	-47
Prime Evng	9	18	20	16	-57
Overnight	4	9	17	14	-76
	47	**100**	**126**	**100**	**-63**


Spend by Daypart
(Millions US$ - Semi Logarithmic)

TOP 30 LEAGUE OF Y2007 (000 US$)

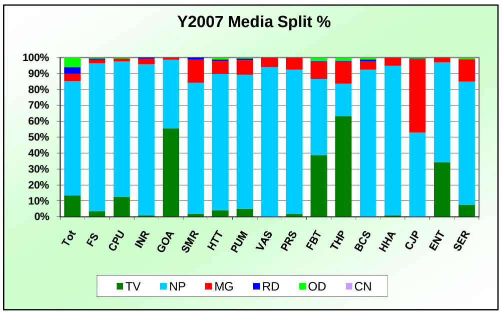
Rank & Brand	JANUARY - JUNE		2 YEAR		MEDIA SPLIT % - JAN - JUN 2007			
	2007	**2006**	**TOTAL**	**AVG**	**TV**	**NP**	**MG**	**OT***
1 Vodafone	12,035	7,570	19,605	9,802	18.08	52.46	3.73	25.73
2 Mobinil	11,755	11,196	22,951	11,476	15.87	61.32	4.46	18.35
3 Etisalat	8,177	20	8,197	4,098	35.39	50.54	1.78	12.29
4 Telecom Egypt	5,688	2,030	7,718	3,859	3.19	77.81	3.86	15.14
5 Nat`l B.egypt	4,380	5,174	9,554	4,777	0.00	95.36	1.79	2.85
6 Arab Bank	3,693	488	4,181	2,091	0.00	94.73	1.06	4.21
7 Talaat Moustaf.group	2,989	0	2,989	1,494	18.50	44.42	0.12	36.96
8 Theatre Art.hse.	2,935	1,363	4,298	2,149	0.53	98.98	0.48	0.00
9 Banque Misr	2,591	1,185	3,776	1,888	9.40	65.21	2.29	23.09
10 Egypt Air	2,515	1,649	4,164	2,082	0.47	75.74	10.81	12.97
11 Coca Cola	2,425	2,627	5,052	2,526	49.62	7.75	1.09	41.53
12 Net Vision	2,414	1,732	4,146	2,073	98.69	0.00	0.00	1.32
13 Emaar	2,312	29	2,341	1,171	0.00	98.66	1.34	0.00
14 Al Masreya	2,124	1,262	3,386	1,693	0.00	92.47	3.65	3.89
15 Toshiba	1,960	580	2,540	1,270	23.60	31.06	2.04	43.29
16 Hyundai	1,947	2,119	4,066	2,033	1.42	82.34	0.77	15.46
17 Cleopatra	1,935	733	2,668	1,334	52.83	27.15	0.28	19.74
18 Raya	1,778	1,077	2,855	1,427	4.48	61.19	1.79	32.53
19 Pepsi	1,710	4,274	5,984	2,992	33.89	14.25	2.53	49.34
20 Constitute C.f.	1,706	578	2,284	1,142	90.54	0.00	0.03	9.46
21 Chevrolet	1,676	1,932	3,608	1,804	1.39	60.09	2.06	36.48
22 Degla Real S.inv	1,559	166	1,725	862	0.00	85.96	13.41	0.61
23 Toyota	1,505	1,518	3,023	1,512	4.35	57.30	11.91	26.46
24 I2	1,493	250	1,743	871	9.09	31.16	5.71	54.00
25 Speranza	1,449	0	1,449	725	13.11	44.82	4.68	37.41
26 Nokia	1,307	853	2,160	1,080	13.65	38.63	7.76	39.98
27 Sharp	1,215	702	1,917	958	8.81	49.92	0.74	40.51
28 Alam Al Phan	1,177	853	2,030	1,015	0.00	98.98	1.02	0.00
29 Universal	1,170	564	1,734	867	2.14	43.77	3.27	50.87
30 President	1,149	1,023	2,172	1,086	25.92	8.08	4.68	61.29

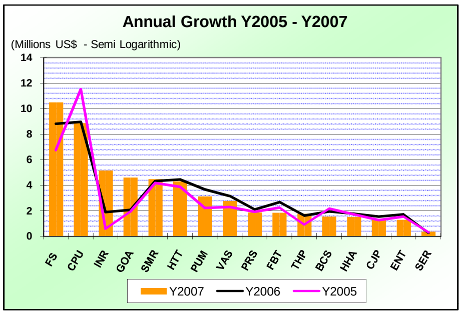
*OT=Radio+OutDoor+Cinema

JORDAN - (Jan-June) Y2007

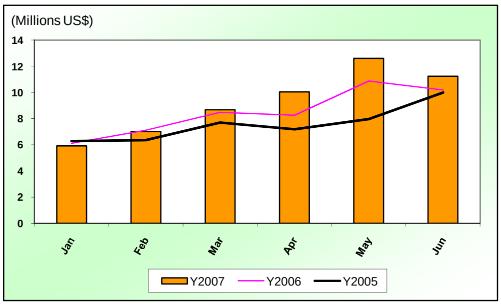
Millions US$ 55 ▲ + 9%

Chapter	Abbreviation	Y2005	Y2006	Y2007	Sh%	%Var'n Y07/06	Media Split % TV	NP	MG	RD	OD	CN
Financial Services	FS	7	9	10	19	19	4	93	3	1	1	0
Communications & Public Utilities	CPU	12	9	9	16	-1	13	85	2	*	1	0
Insurance & Real Estate	INR	1	2	5	9	171	1	94	3	1	*	0
Government/Organization Advertising	GOA	2	2	5	8	123	55	43	1	*	*	0
Shopping Malls & Retail Stores	SMR	4	4	4	8	4	2	82	15	1	*	0
Hotel, Travel & Tourism	HTT	4	4	4	8	-4	4	86	8	1	1	0
Publishig Media	PUM	2	4	3	6	-15	5	84	9	1	1	0
Vehicles,Accessories & Supply	VAS	2	3	3	5	-12	*	93	6	*	*	0
Professional Services	PRS	2	2	2	3	-10	2	90	8	*	*	0
Food Beverages And Tobacco	FBT	2	3	2	3	-31	39	48	11	1	2	0
Toiletries Hygiene/ House Care Products	THP	1	2	2	3	10	63	20	14	1	2	0
Business/Construct Equip. & Supply	BCS	2	2	2	3	-20	0	92	5	1	1	0
Household Appliances	HHA	2	2	2	3	-14	1	93	5	*	*	0
Clothing,Jewellery & Personal Acs	CJP	1	2	1	2	-11	*	53	46	1	1	0
Entertainment	ENT	2	2	1	2	-24	34	63	3	0	0	0
Other Services	SER	0	0	0	1	45	8	77	14	*	1	0
Total		**45**	**51**	**55**	**100**	**9**	**14**	**72**	**5**	**4**	**6**	**0**


Y2007 Media Split %


Annual Growth Y2005 - Y2007

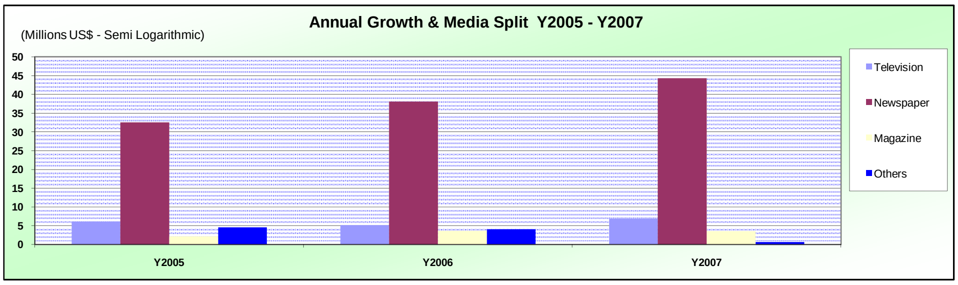
Monthly Spend Analysis (Millions US$)Y2005 - 2007



Period	Y2005	Y2006	Y2007	Var'n % Y07/06
Jan	6	6	6	-3
Feb	6	7	7	-2
Mar	8	8	9	2
Apr	7	8	10	21
May	8	11	13	16
Jun	10	10	11	10
Total	**45**	**51**	**55**	**9**

Overall Media Split Analysis (Millions US$)

Media	Y2005		Y2006		Y2007		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2006/2007	Y07	Y06
Television	6	13	5	10	7	12	34	113	85
Newspaper	33	72	38	75	44	80	16	136	117
Magazine	2	5	4	7	4	6	-2	161	165
Others	5	10	4	8	1	1	-83	15	89
Total	**45**	**100**	**51**	**100**	**55**	**100**	**9**	**122**	**112**


Annual Growth & Media Split Y2005 - Y2007

Top Brands Y2007 (000 US$)

Television Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Sama Telecom	558	N
2	Aqaba Sp.econ.z.	493	N
3	Reactive Tourism	483	N
4	Housing Bank	176	264
5	Jordan Tourism B	160	N
6	Pantene	148	27
7	Fine	141	82
8	Crest	141	220
9	Head & Shoulders	122	1
10	Royal Jordanian	120	N
11	Orange	115	N
12	Nabil	112	N

Newspapers Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Arab Bank	3168	145
2	Fastlink	1960	57
3	Mobilecom	1828	93
4	Jordan National	1440	-26
5	Umniah	1343	-5
6	Housing Bank	1121	62
7	Cairo Amman Bank	677	40
8	Capital Bank Ltd	574	N
9	Tameer	506	E
10	B.of Jordan Ltd	500	24
11	Orange	449	N
12	Nokia	405	58

Magazines Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Arab Bank	104	198
2	Fastlink	62	78
3	Kurdi Jewelry	56	9
4	Nivea	54	E
5	Sakkijha	41	34
6	Royal Jordanian	37	-3
7	Mobilecom	35	-23
8	Ayla Oasis Dv.co	35	105
9	Imseeh Jewellery	34	42
10	Volkswagen	34	N
11	Pantene	33	38
12	Nader	32	N

Radio Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Tala Bay	33	N
2	B.of Jordan Ltd	31	-47
3	Red	23	N
4	Patchi	23	N
5	Perfect Link	19	N
6	Wanadoo	19	-60
7	Gift Corner Est.	17	N
8	B.of Jordan	14	N
9	Microsoft	11	N
10	Umniah	11	-95
11	Damac	10	N
12	Cairo Amman Bank	8	-75

Outdoor Top Spenders

Rank	Brand	Y2007	%Var'n Y07/06
1	Mcdonald`s	26	29
2	Fastlink	22	N
3	Jordan National	15	70
4	Tide	15	N
5	Nokia	13	17
6	B.of Jordan Ltd	11	-54
7	Burger King	10	N
8	Head & Shoulders	10	-6
9	Galaxy	9	N
10	Insurance Commis	9	-49
11	Etihad Airways	9	N
12	Societe Generale	9	-48

E - Exceeding the limit >300%   N - New

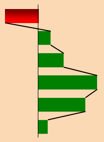
JORDAN - (Jan-June) Y2007

Millions US$ 55 ▲ + 9%

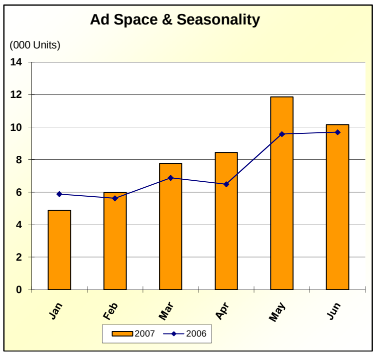
Thousand SESU 49 ▲ + 11%

TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2007/2006Var %



Period	ALL MEDIA (SESU Units)* 2007	2006	% Var'n	NEWSPAPERS (Pages) 2007	% Var'n	MAGAZINES (Pages) 2007	% Var'n	TELEVISION (Min) 2007	% Var'n
January	4882	5879	-17	2154	7	423	-16	1510	-24
February	5974	5620	6	2744	-1	434	-14	1792	41
March	7771	6882	13	3507	4	454	-27	1783	27
April	8430	6486	30	4225	22	574	8	2614	117
May	11865	9572	24	5889	43	653	-10	2896	54
June	10148	9683	5	4716	20	632	3	3427	7
	49070	**44123**	**11**	**23235**	**18**	**3170**	**-10**	**14023**	**28**

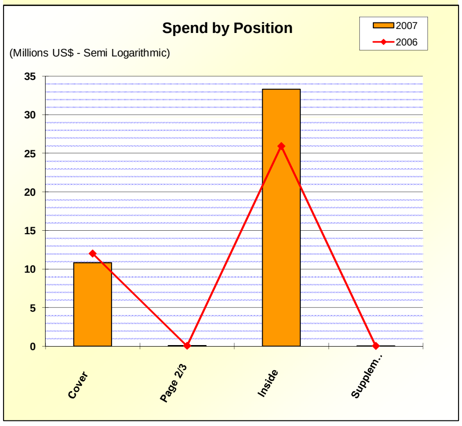


Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

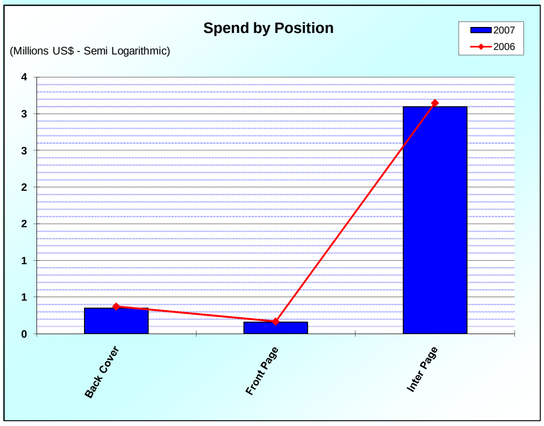
NEWSPAPERS

Spend by Position (Millions US $)	2007 Value	%	2006 Value	%	Var'n %
Cover	11	24	12	32	-10
Page 2/3	0	0	0	0	52
Inside	33	75	26	68	28
Supplement	0	0	0	0	7
	44	**100**	**38**	**100**	**16**



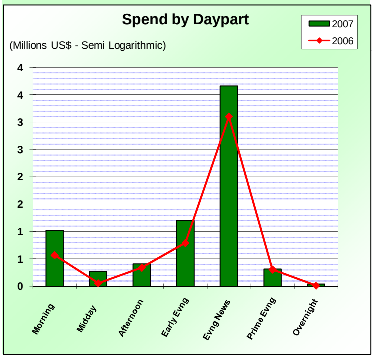
MAGAZINES

Spend by Position (Millions US $)	2007 Value	%	2006 Value	%	Var'n %
Back Cover	0	10	0	10	-5
Front Page	0	4	0	5	-5
Inter Page	3	86	3	85	-2
	4	**100**	**4**	**100**	**-2**



TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2007 Value	%	2006 Value	%	Var'n %
Morning	1	15	1	11	81
Midday	0	4	0	1	386
Afternoon	0	6	0	7	20
Early Evng	1	17	1	15	52
Evng News	4	53	3	60	18
Prime Evng	0	5	0	6	2
Overnight	0	1	0	0	179
	7	**100**	**5**	**100**	**34**



TOP 30 LEAGUE OF Y2007 (000 US$)

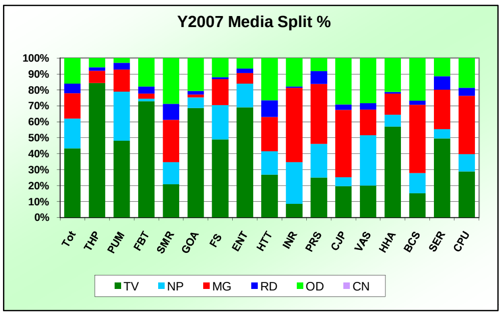
Rank & Brand	JANUARY - JUNE 2007	2006	2 YEAR TOTAL	AVG	MEDIA SPLIT % - JAN - JUN 2007 TV	NP	MG	OT*
1 Arab Bank	3,272	1,363	4,635	2,317	0.00	96.82	3.17	0.00
2 Fastlink	2,111	1,666	3,777	1,889	3.21	92.85	2.93	1.02
3 Mobilecom	1,957	1,337	3,294	1,647	4.34	93.43	1.79	0.44
4 Jordan National	1,531	2,016	3,547	1,773	3.96	94.05	0.63	1.36
5 Umniah	1,383	2,213	3,596	1,798	0.00	97.13	1.43	1.43
6 Housing Bank	1,333	757	2,090	1,045	13.18	84.07	2.29	0.46
7 Reactive Tourism	783	0	783	391	61.68	37.70	0.60	0.00
8 Cairo Amman Bank	704	525	1,229	614	0.00	96.20	2.56	1.20
9 B.of Jordan Ltd	586	563	1,149	574	6.54	85.26	0.93	7.19
10 Capital Bank Ltd	584	0	584	292	0.47	98.36	0.10	1.11
11 Orange	573	0	573	287	19.99	78.36	1.72	0.00
12 Sama Telecom	565	12	577	289	98.74	1.34	0.00	0.00
13 Tameer	544	154	698	349	5.24	92.95	1.77	0.00
14 Aqaba Sp.econ.z.	522	0	522	261	94.40	5.69	0.00	0.00
15 Royal Jordanian	478	246	724	362	25.00	66.69	7.72	0.62
16 Nokia	432	333	765	383	0.00	93.84	3.10	3.11
17 Jordan Tourism B	408	0	408	204	39.17	60.88	0.00	0.00
18 Jordan Telecom	406	392	798	399	0.00	99.29	0.82	0.00
19 Batelco	314	194	508	254	0.00	99.27	0.76	0.00
20 Sport Land	286	185	471	236	0.00	100.06	0.00	0.00
21 Dallas	272	276	548	274	0.00	99.17	0.68	0.00
22 The Land	266	0	266	133	0.00	99.97	0.00	0.00
23 Holiday T. & T.	259	249	508	254	0.00	98.80	1.16	0.00
24 Jordan Comm.bank	256	248	504	252	0.98	97.06	1.78	0.00
25 Tala Bay	254	147	401	200	0.00	76.12	10.15	13.68
26 Lexus	249	0	249	124	0.00	92.64	7.31	0.00
27 Xpress	247	220	467	234	0.77	95.84	1.00	2.44
28 C Town	242	171	413	206	0.00	99.88	0.00	0.00
29 Weinak	235	70	305	153	0.00	96.92	3.26	0.00
30 Nabil Arafat	221	0	221	110	0.00	97.86	2.06	0.00

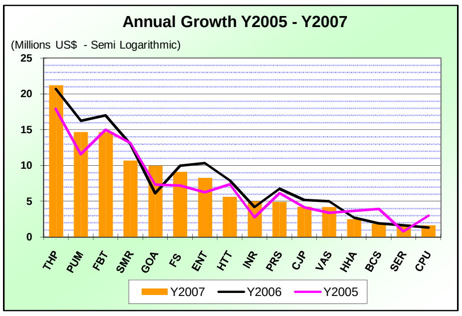
*OT=Radio+OutDoor+Cinema

LEBANON - (Jan-June) Y2007

Millions US$ 120 ▼ - 7%

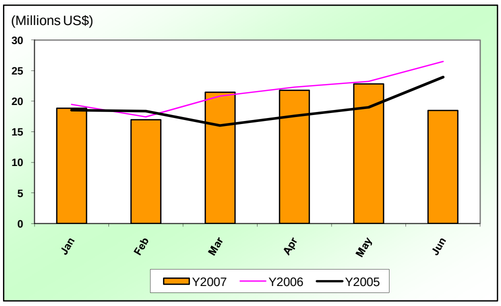
						%Var'n	Media Split %					
Chapter	**Abbreviation**	**Y2005**	**Y2006**	**Y2007**	**Sh%**	**Y07/06**	**TV**	**NP**	**MG**	**RD**	**OD**	**CN**
Toiletries Hygiene/ House Care Products	THP	18	21	21	18	3	84	*	8	2	6	0
Publishig Media	PUM	12	16	15	12	-9	48	31	14	4	3	0
Food Beverages And Tobacco	FBT	15	17	15	12	-14	73	2	3	5	18	0
Shopping Malls & Retail Stores	SMR	13	13	11	9	-18	21	14	27	10	29	0
Government/Organization Advertising	GOA	7	6	10	8	63	69	7	2	2	21	0
Financial Services	FS	7	10	9	8	-9	49	22	16	1	12	0
Entertainment	ENT	6	10	8	7	-20	69	15	7	3	7	0
Hotel, Travel & Tourism	HTT	7	8	6	5	-29	27	15	21	10	27	0
Insurance & Real Estate	INR	3	4	5	4	19	9	26	47	1	18	0
Professional Services	PRS	6	7	5	4	-27	25	21	38	8	8	0
Clothing,Jewellery & Personal Acs	CJP	4	5	4	4	-18	20	6	42	3	29	0
Vehicles,Accessories & Supply	VAS	3	5	4	3	-16	20	32	16	4	28	0
Household Appliances	HHA	4	3	2	2	-9	57	7	13	1	21	0
Business/Construct Equip. & Supply	BCS	4	2	2	2	-2	15	13	43	3	27	0
Other Services	SER	1	2	2	2	12	50	6	25	8	12	0
Communications & Public Utilities	CPU	3	1	2	1	27	29	11	37	5	19	0
Total		**113**	**130**	**120**	**100**	**-7**	**43**	**19**	**16**	**6**	**16**	**0**


Y2007 Media Split %


Annual Growth Y2005 - Y2007

(Millions US$ - Semi Logarithmic)

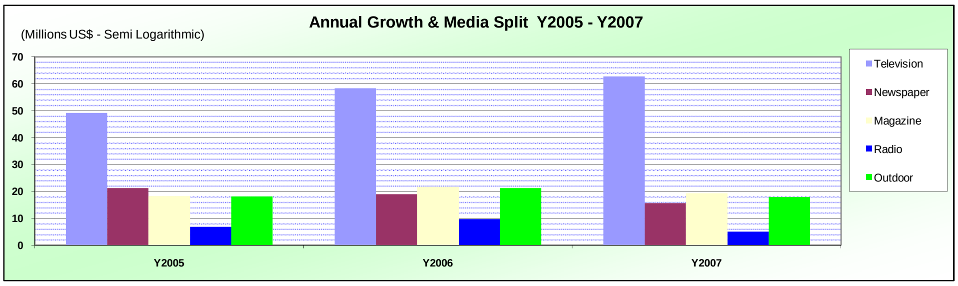
Monthly Spend Analysis (Millions US$)Y2005 - 2007



				Var'n %
Period	**Y2005**	**Y2006**	**Y2007**	**Y07/06**
Jan	19	19	19	-3
Feb	18	17	17	-3
Mar	16	21	21	3
Apr	18	22	22	-2
May	19	23	23	-2
Jun	24	26	19	-30
Total	**113**	**130**	**120**	**-7**

Overall Media Split Analysis (Millions US$)

Media	**Y2005**		**Y2006**		**Y2007**		**Var'n %**	**Growth Index***	
	Value	**Sh%**	**Value**	**Sh%**	**Value**	**Sh%**	**Y2006/2007**	**Y07**	**Y06**
Television	49	43	58	45	63	52	8	128	119
Newspaper	21	19	19	15	16	13	-18	74	90
Magazine	18	16	22	17	19	16	-11	106	119
Radio	7	6	10	7	5	4	-48	73	141
Outdoor	18	16	21	16	18	15	-16	98	117
Total	**113**	**100**	**130**	**100**	**120**	**100**	**-7**	**106**	**114**


Annual Growth & Media Split Y2005 - Y2007

(Millions US$ - Semi Logarithmic)

Top Brands Y2007 (000 US$)

Television Top Spenders

			%Var'n
Rank	**Brand**	**Y2007**	**Y07/06**
1	Coca Cola	5455	29
2	Pantene	4686	42
3	Pepsi	3567	-12
4	Byblos	2911	-44
5	Chahed Chaf Kol	2597	N
6	Head & Shoulders	2540	8
7	Mouwaten Loubnan	2499	N
8	Crest	2453	18
9	All Prints	2286	E
10	Ariel	2276	-13
11	Garnier	2171	171
12	La Youmal Show	2064	11

Newspapers Top Spenders

			%Var'n
Rank	**Brand**	**Y2007**	**Y07/06**
1	Bankmed	253	14
2	Medgulf	245	80
3	Blom Bank	167	2
4	Entertainment C.	154	N
5	Guinness World R	146	N
6	Banque Audi	146	-2
7	Winston	137	-35
8	Monoprix	133	175
9	Zenobia	131	N
10	Nbn	128	106
11	Toyota	127	145
12	Aishti	126	-30

Magazines Top Spenders

			%Var'n
Rank	**Brand**	**Y2007**	**Y07/06**
1	S.t.dupont	308	104
2	M.e.a.	184	E
3	Naharnet	183	15
4	Korloff	144	E
5	Fransa Bank	136	8
6	Oris	129	-38
7	Blom Bank	116	-6
8	A.lange & Sohne	112	N
9	Cartier	107	53
10	Nokia	106	60
11	Fady Kataya	99	14
12	Cnbc Arabia	98	29

Radio Top Spenders

			%Var'n
Rank	**Brand**	**Y2007**	**Y07/06**
1	Nikon	89	N
2	Casino Du Liban	77	E
3	Pepsi	73	5
4	Virgin	69	3
5	Abc	66	-32
6	Kyphi	64	-44
7	Visa	58	88
8	Persil	55	15
9	Abed Tahan _sons	54	253
10	Anaconda H.inst.	52	0
11	Prestige	50	176
12	Tatra	48	E

Outdoor Top Spenders

			%Var'n
Rank	**Brand**	**Y2007**	**Y07/06**
1	I Love Life	615	N
2	Ighathah	556	N
3	Banque Audi	480	E
4	Bhv	439	33
5	Property Plus	411	N
6	Paris 3	376	N
7	Coca Cola	372	N
8	Nokia	361	142
9	Pepsi	352	72
10	Winston	338	-26
11	Engine Jeans	338	104
12	Daniela Tobler	332	-2

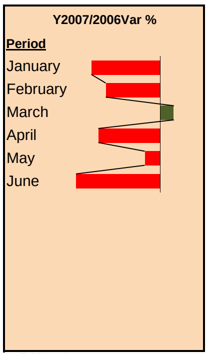
E - Exceeding the limit >300%   N - New

LEBANON - (Jan-June) Y2007

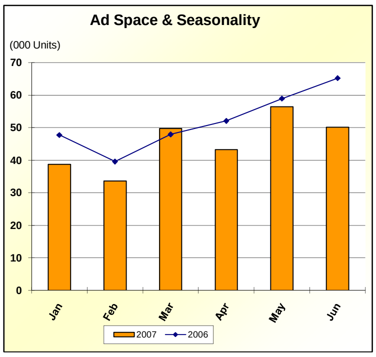
Millions US$ 120 ▼ - 7%

Thousand SESU 272 ▼ - 13%

TOTAL MARKET ADVERTISING SPACE ALLOCATION



ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
2007	2006	% Var'n	2007	% Var'n	2007	% Var'n	2007	% Var'n
38696	47720	-19	643	-1	1557	-19	12516	-24
33670	39577	-15	545	-27	1383	-13	13226	-5
49729	47925	4	758	-14	1455	-21	17023	-13
43234	52079	-17	701	-10	1844	-25	16957	-12
56441	58907	-4	675	-28	1875	2	17210	-16
50099	65190	-23	735	-29	1719	-24	17795	-16
271869	**311399**	**-13**	**4057**	**-20**	**9832**	**-17**	**94728**	**-15**

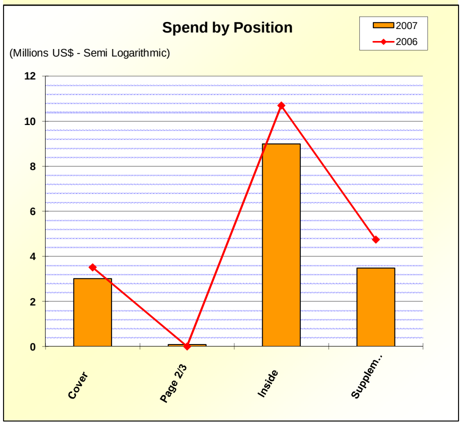


Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

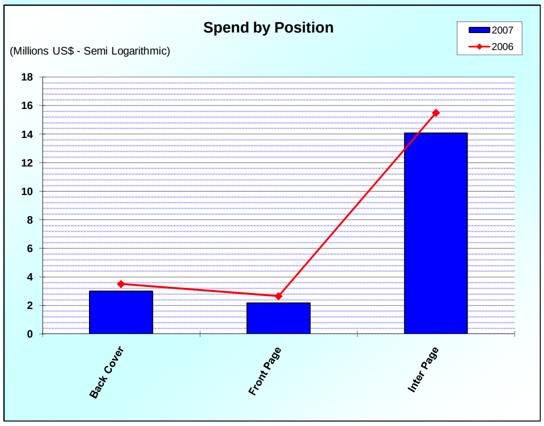
NEWSPAPERS

Spend by Position	2007		2006		Var'n %
(Millions US $)	Value	%	Value	%	
Cover	3	19	4	19	-14
Page 2/3	0	1	0	0	1317
Inside	9	58	11	56	-16
Supplement	3	22	5	25	-27
	16	**100**	**19**	**100**	**-18**



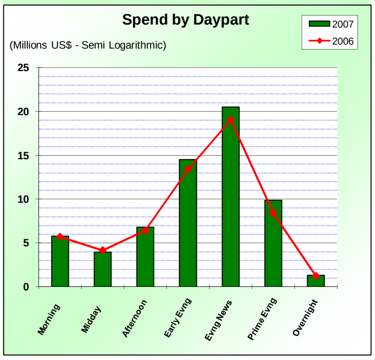
MAGAZINES

Spend by Position	2007		2006		Var'n %
(Millions US $)	Value	%	Value	%	
Back Cover	3	16	4	16	-14
Front Page	2	11	3	12	-18
Inter Page	14	73	15	72	-9
	19	**100**	**22**	**100**	**-11**



TELEVISION - KSA Time

Spend by Daypart	2007		2006		Var'n %
(Millions US $)	Value	%	Value	%	
Morning	6	9	6	10	2
Midday	4	6	4	7	-5
Afternoon	7	11	6	11	6
Early Evng	15	23	13	23	8
Evng News	21	33	19	33	8
Prime Evng	10	16	8	14	17
Overnight	1	2	1	2	3
	63	**100**	**58**	**100**	**8**



TOP 30 LEAGUE OF Y2007 (000 US$)

Rank & Brand	JANUARY - JUNE		2 YEAR		MEDIA SPLIT % - JAN - JUN 2007			
	2007	2006	TOTAL	AVG	TV	NP	MG	OT*
1 Coca Cola	5,873	4,268	10,141	5,071	92.88	0.00	0.05	7.07
2 Pantene	4,778	3,402	8,180	4,090	98.08	0.04	1.43	0.47
3 Pepsi	4,000	4,317	8,317	4,158	89.17	0.00	0.20	10.62
4 Byblos	3,229	5,613	8,842	4,421	90.14	3.38	0.94	5.54
5 Head & Shoulders	2,618	2,404	5,022	2,511	97.02	0.00	0.00	2.98
6 Banque Audi	2,611	1,272	3,883	1,941	73.38	5.57	2.63	18.39
7 Chahed Chaf Kol	2,597	0	2,597	1,299	100.01	0.00	0.00	0.00
8 Mouwaten Loubnan	2,499	0	2,499	1,250	100.01	0.00	0.00	0.00
9 I Love Life	2,476	0	2,476	1,238	74.71	0.00	0.11	25.19
10 Crest	2,453	2,238	4,691	2,346	100.00	0.00	0.00	0.00
11 Ariel	2,393	2,635	5,028	2,514	95.10	0.00	0.11	4.79
12 All Prints	2,286	280	2,566	1,283	100.00	0.00	0.00	0.00
13 Garnier	2,171	802	2,973	1,486	100.00	0.00	0.00	0.00
14 Gillette	2,139	734	2,873	1,436	92.26	0.00	1.50	6.23
15 La Youmal Show	2,074	1,896	3,970	1,985	99.49	0.53	0.00	0.00
16 Koleston	2,054	1,217	3,271	1,636	93.06	0.00	2.80	4.15
17 Tide	2,019	2,243	4,262	2,131	99.98	0.00	0.00	0.00
18 Pampers	2,010	1,717	3,727	1,864	97.45	0.00	0.62	1.94
19 Libano-francaise	1,920	180	2,100	1,050	86.41	4.06	4.65	4.89
20 Khoury Home	1,857	20	1,877	939	95.33	0.32	0.08	4.29
21 Persil	1,723	2,040	3,763	1,882	87.28	0.00	0.00	12.73
22 Herbal Essences	1,693	2,273	3,966	1,983	99.12	0.00	0.00	0.85
23 Bonux	1,631	776	2,407	1,204	98.06	0.00	0.00	1.94
24 Blom Bank	1,621	2,190	3,811	1,906	78.43	10.33	7.19	4.09
25 Pert Plus	1,468	842	2,310	1,155	100.00	0.00	0.00	0.00
26 Always	1,448	1,784	3,232	1,616	99.64	0.00	0.33	0.00
27 Loterie National	1,416	1,127	2,543	1,271	99.77	0.07	0.14	0.00
28 Nahar Al Chabab	1,407	0	1,407	703	98.08	1.04	0.00	0.87
29 Amana Care	1,395	247	1,642	821	99.97	0.00	0.00	0.00
30 Davidoff	1,380	65	1,445	722	97.55	0.00	2.44	0.00

*OT=Radio+OutDoor+Cinema

Pan Arab Research Center

APPENDIX: ADVERTISING EXPENDITURES Y2006

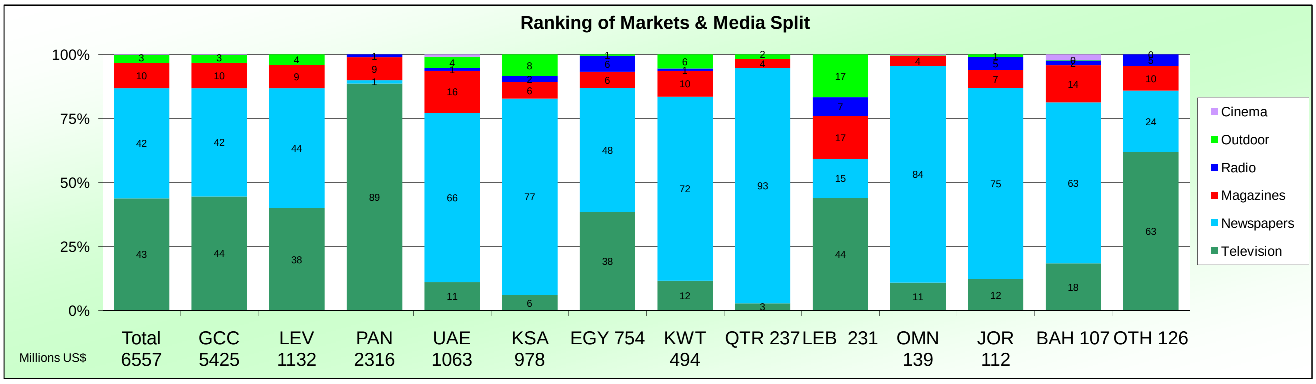
ADVERTISING MARKETS Y2006

Millions US$ 6557 ▲ + 21%

1- Markets Ranking & Media Contribution (US $ Millions)

					%Var'n		Media Contribution (US $ Million)				
Rank	**Market Name & Abbreviation**		**Y2004**	**Y2005**	**Y2006**	**Y06/05**	**Television**	**Newspapers**	**Magazines**	**Radio**	**Outdoor**	**Cinema**
1	Pan Arab Media	PAN	1,779	1,872	2,316	24	2,054	28	209	25	0	0
2	United Arab Emirates	UAE	634	869	1,063	22	119	701	175	11	47	9
3	Kindom Of Saudi Arabia	KSA	699	911	978	7	59	751	62	23	83	0
4	Egypt	EGY	445	540	754	40	289	365	48	47	4	0
5	Kuwait	KWT	382	438	494	13	58	355	50	4	27	0
6	Qatar	QTR	93	118	237	101	7	219	9	0	4	0
7	Lebanon	LEB	276	270	231	-14	102	35	38	17	39	0
8	Oman	OMN	72	105	139	32	15	117	6	0	0	1
9	Jordan	JOR	76	108	112	4	14	84	8	6	1	0
10	Bahrain	BAH	116	103	107	3	20	67	15	2	0	2
11	Other Markets**	OTH	47	70	126	80	79	31	12	6	0	0
	Total AGCC & Pan Arab	**GCC**	**3,802**	**4,451**	**5,425**	**22**	**2,390**	**2,258**	**534**	**72**	**162**	**12**
	Total Levant Markets	**LEV**	**818**	**953**	**1,132**	**19**	**426**	**495**	**97**	**70**	**44**	**0**
	Total All Markets	**M$**	**4,619**	**5,404**	**6,557**	**21**	**2,816**	**2,753**	**631**	**141**	**206**	**12**

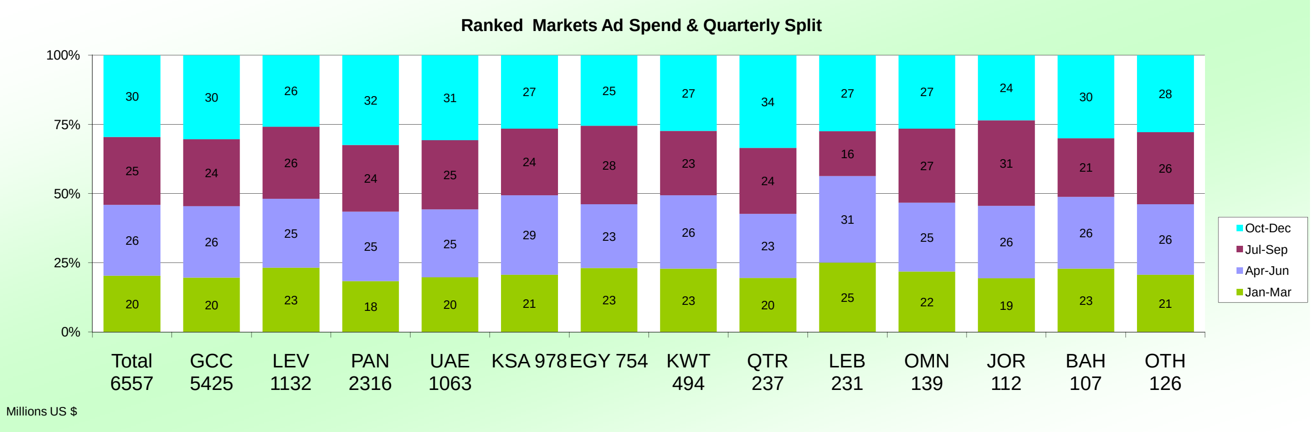
			i%		**i%**		**i%**		**i%**		**i%**		**i%**
Markets Growth Index (Base Y2004)	**Y2004**	4,619	100	2,190	100	1,702	100	466	100	88	100	162	100	12	100
	Y2005	5,404	117	2,275	104	2,275	134	562	121	102	116	174	108	13	108
	Y2006	6,557	142	2,816	129	2,753	162	631	135	141	160	206	127	12	98



2 - Markets Adspend by Quarter Y2006 (US $ Millions)

			Y2006		JAN - MAR		APR-JUN		JUL-SEP		OCT-DEC	
Rank	**Market Name**	**Abbreviation**	**Value**	**Sh%**	**Value**	**Sh%**	**Value**	**Sh%**	**Value**	**Sh%**	**Value**	**Sh%**
1	Pan Arab Media	PAN	2,316	35	423	18	582	25	561	24	750	32
2	United Arab Emirates	UAE	1,063	16	209	20	261	25	266	25	327	31
3	Kindom Of Saudi Arabia	KSA	978	15	202	21	282	29	235	24	260	27
4	Egypt	EGY	754	11	173	23	174	23	214	28	192	25
5	Kuwait	KWT	494	8	113	23	131	26	115	23	135	27
6	Qatar	QTR	237	4	47	20	55	23	57	24	80	34
7	Lebanon	LEB	231	4	58	25	72	31	37	16	63	27
8	Oman	OMN	139	2	30	22	35	25	37	27	37	27
9	Jordan	JOR	112	2	22	19	29	26	35	31	26	24
10	Bahrain	BAH	107	2	24	23	28	26	23	21	32	30
11	Other Markets**	OTH	126	2	26	21	33	26	33	26	36	28
	Total AGCC & Pan Arab	**GCC**	**5,425**	**83**	**1,066**	**20**	**1,398**	**26**	**1,319**	**24**	**1,646**	**30**
	Total Levant Markets	**LEV**	**1,132**	**17**	**262**	**23**	**283**	**25**	**295**	**26**	**292**	**26**
	Total All Markets	**M$**	**6,557**	**100**	**1,327**	**20**	**1,681**	**26**	**1,614**	**25**	**1,938**	**30**

			i%		**i%**		**i%**		**i%**		**i%**
Markets Growth Index (Base Y2004)	**Y2004**	4,619	100	880	100	1,174	100	1,135	100	1,430	100
	Y2005	5,404	117	1,119	127	1,336	114	1,306	115	1,641	115
	Y2006	6,557	142	1,327	151	1,681	143	1,614	142	1,938	136

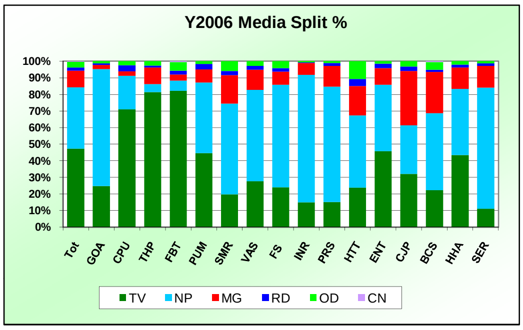


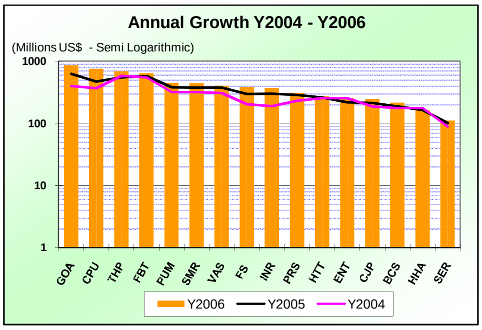
* Egypt Spend Data reported at current market US Dollar value

****** Other Markets : Combined - Syria, Yemen & Arasian

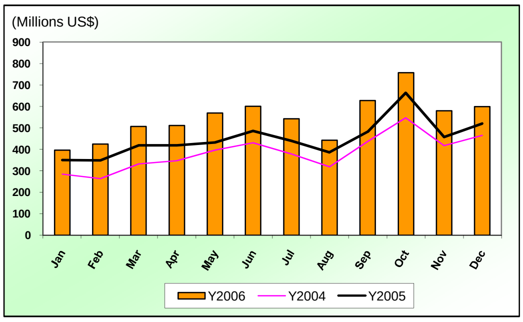
AGCC,LEVANT*,PAN ARAB & ARASIAN MEDIA MARKET Y2006

Chapter	Abbreviation	Y2004	Y2005	Y2006	Sh%	%Var'n Y06/05	Media Split % TV	NP	MG	RD	OD	CN
Government/Organization Advertising	GOA	402	629	854	13	36	25	70	3	1	1	*
Communications & Public Utilities	CPU	368	472	756	12	60	71	20	3	4	3	*
Toiletries Hygiene/ House Care Products	THP	585	552	687	10	24	81	5	10	1	3	*
Food Beverages And Tobacco	FBT	553	577	638	10	10	82	6	4	2	5	1
Publishig Media	PUM	320	382	449	7	18	45	43	8	3	2	0
Shopping Malls & Retail Stores	SMR	320	376	444	7	18	20	54	17	3	6	*
Vehicles,Accessories & Supply	VAS	307	379	401	6	6	28	55	12	2	3	*
Financial Services	FS	203	298	385	6	29	24	62	8	2	4	*
Insurance & Real Estate	INR	190	302	371	6	23	15	77	7	1	1	0
Professional Services	PRS	231	287	311	5	9	15	69	12	2	1	*
Hotel, Travel & Tourism	HTT	255	261	272	4	4	24	43	18	4	11	*
Entertainment	ENT	255	220	254	4	15	46	40	10	3	2	*
Clothing,Jewellery & Personal Acs	CJP	188	214	248	4	16	32	29	33	3	3	*
Business/Construct Equip. & Supply	BCS	176	187	214	3	14	22	46	25	1	5	1
Household Appliances	HHA	177	164	162	2	-2	43	40	13	2	2	*
Other Services	SER	89	101	111	2	10	11	73	13	2	1	0
Total		**4,619**	**5,404**	**6,557**	**100**	**21**	**47**	**37**	**10**	**2**	**4**	**0**


Y2006 Media Split %


Annual Growth Y2004 - Y2006

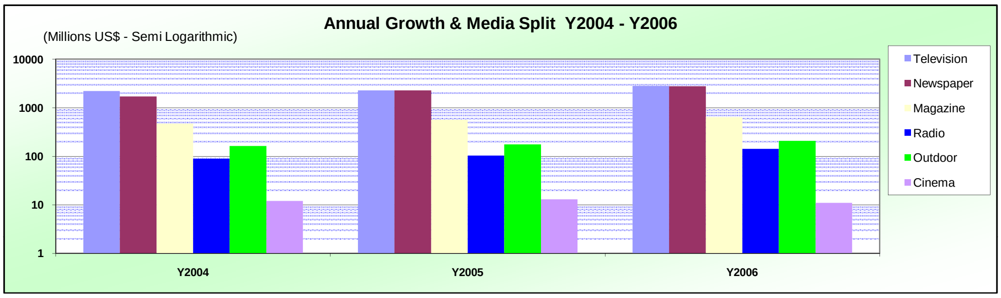
Monthly Spend Analysis (Millions US$)Y2004 - 2006



Period	Y2004	Y2005	Y2006	Var'n % Y06/05
Jan	284	351	396	13
Feb	264	349	425	22
Mar	332	419	506	21
Apr	347	418	511	22
May	397	432	570	32
Jun	431	486	600	23
Jul	379	440	543	24
Aug	319	386	443	15
Sep	437	481	627	30
Oct	547	663	757	14
Nov	418	457	580	27
Dec	465	520	599	15
Total	**4619**	**5404**	**6557**	**21**

Overall Media Split Analysis (Millions US$)

Media	Y2004		Y2005		Y2006		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2005/2006	Y06	Y05
Television	2,190	47	2,275	42	2816	43	24	129	104
Newspaper	1,702	37	2,275	42	2,752	42	21	162	134
Magazine	466	10	562	10	631	10	12	135	121
Radio	88	2	102	2	141	2	38	160	116
Outdoor	162	3	174	3	206	3	19	128	108
Cinema	12	0	13	0	11	0	-15	92	108
Total	**4,619**	**100**	**5,404**	**100**	**6,557**	**100**	**21**	**142**	**117**


Annual Growth & Media Split Y2004 - Y2006

Millions US$ 6557 ▲ + 21%

Top Brands Y2006 (000 US$)

Television Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Dove	42462	37
2	Pepsi	35836	5
3	Galaxy	35124	51
4	Saudi Telecomm	33153	49
5	Coca Cola	31457	12
6	Johnson & Johnson	31455	246
7	Iraq Hope & Peace	30662	267
8	Mobily	30258	98
9	Knorr	23848	11
10	New Boy	23346	44
11	Watani - Uae	23271	N
12	Lipton	22543	-35

Newspapers Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Chevrolet	19274	49
2	Mobily	16653	33
3	Toyota	16406	3
4	Nokia	13195	-36
5	Emaar	12969	-26
6	Mobinil	12085	86
7	Ncb	11815	85
8	Saudi Telecomm	10754	63
9	Panasonic	10579	31
10	Hyundai	9755	10
11	Nissan	9641	2
12	Doha Asian Games	9104	E

Magazines Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Nokia	4816	-26
2	Toyota	3790	-4
3	Damas	3492	33
4	Hewlett Packard	3143	18
5	Rolex	3122	1
6	B.m.w.	2960	38
7	Omega	2655	16
8	Nissan	2529	-48
9	Mitsubishi	2486	95
10	Samsung	2263	4
11	Panasonic	2216	46
12	Mercedes	2191	1

Radio Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Vodafone	2510	57
2	Mobinil	2262	83
3	Jeddah Festival	2180	82
4	Drosh	2107	200
5	Toyota	1612	266
6	Chevrolet	1498	174
7	Sabb	1207	129
8	Projaih	1164	-17
9	Pepsi	1140	24
10	Mobil	1134	38
11	Mobily	1048	113
12	British Airways	1027	E

Outdoor Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Al Marai	7118	E
2	Mobily	6764	63
3	Saudi Telecomm	6676	154
4	Mcdonald`s	4913	37
5	Kentucky	4184	6
6	Burger King	4183	35
7	Toyota	3462	192
8	Hardees	2752	10
9	Damas	2688	2
10	Al Tazaj-fakieh	2531	-13
11	Pizza Hut	2160	3
12	Motorola	2127	E

E - Exceeding the limit >300%   N - New

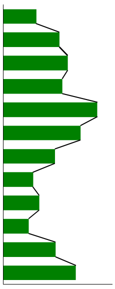
AGCC,LEVANT*,PAN ARAB & ARASIAN MEDIA MARKET Y2006

Millions US$ 6557 ▲ + 21%

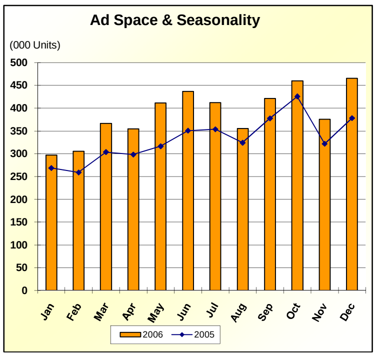
Thousand SESU 4662 ▲ + 17%

TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2006/2005Var %



Period	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
	2006	2005	% Var'n	2006	% Var'n	2006	% Var'n	2006	% Var'n
January	297140	268893	11	43714	19	13709	1	160523	9
February	305584	259189	18	43226	15	14279	13	166897	28
March	366302	303751	21	49867	14	16583	20	208880	24
April	354544	298399	19	48696	16	17166	9	191764	16
May	411495	316473	30	51489	13	17946	17	225395	39
June	437101	350633	25	55448	18	18512	15	237036	28
July	412167	353955	16	52727	21	16175	13	224578	16
August	355069	324347	9	44485	8	11298	-8	218251	29
September	421085	377860	11	54533	19	16045	8	235871	27
October	460299	425738	8	49757	-3	18138	3	280281	14
November	375575	321935	17	56808	30	18710	9	218905	22
December	465786	378180	23	63927	38	21106	-4	267763	31
	4662148	**3979353**	**17**	**614677**	**17**	**199667**	**8**	**2636144**	**23**



Ad Space & Seasonality

Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

NEWSPAPERS

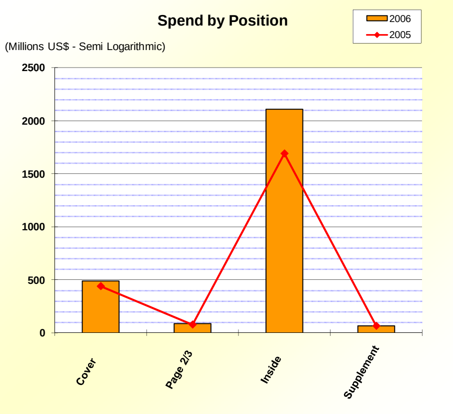
Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Cover	488	18	439	19	11
Page 2/3	89	3	79	3	13
Inside	2109	77	1691	74	25
Supplement	66	2	66	3	1
	2752	**100**	**2275**	**100**	**21**

MAGAZINES

Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Back Cover	81	13	77	14	5
Front Page	52	8	49	9	5
Inter Page	499	79	436	78	15
	631	**100**	**562**	**100**	**12**

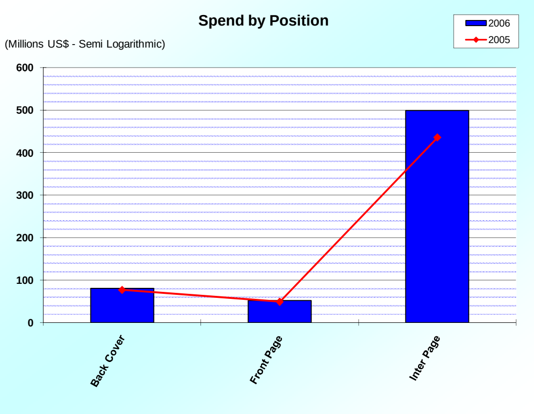
TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Morning	166	6	125	6	32
Midday	230	8	174	8	32
Afternoon	366	13	276	12	33
Early Evng	472	17	363	16	30
Evng News	581	21	491	22	18
Prime Evng	598	21	519	23	15
Overnight	403	14	328	14	23
	2816	**100**	**2275**	**100**	**24**



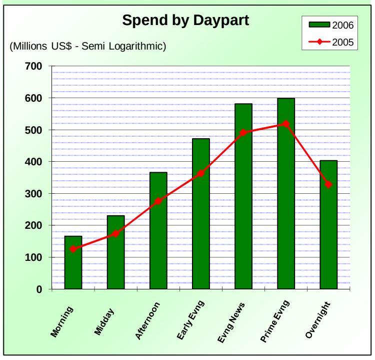
Spend by Position

(Millions US$ - Semi Logarithmic)



Spend by Position

(Millions US$ - Semi Logarithmic)



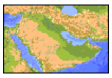
Spend by Daypart

(Millions US$ - Semi Logarithmic)

TOP 30 LEAGUE OF Y2006 (000 US$)

Rank & Brand	JANUARY - DECEMBER		2 YEAR		MEDIA SPLIT % - JAN - DEC 2006			
	2006	2005	TOTAL	AVG	TV	NP	MG	OT*
1 Mobily	55,383	33,516	88,899	44,450	54.63	30.07	1.19	14.11
2 Saudi Telecomm	52,070	33,117	85,187	42,594	63.67	20.65	2.10	13.58
3 Dove	45,396	32,661	78,057	39,029	93.54	0.14	3.80	2.52
4 Pepsi	44,256	39,689	83,945	41,973	80.97	9.35	1.94	7.73
5 Chevrolet	38,921	37,978	76,899	38,450	40.78	49.52	4.57	5.13
6 Toyota	36,679	36,431	73,110	36,555	30.87	44.73	10.33	14.07
7 Galaxy	36,396	24,336	60,732	30,366	96.51	0.67	1.82	1.00
8 Coca Cola	35,738	30,960	66,698	33,349	88.02	4.55	2.52	4.91
9 Johnson & Johnson	33,106	10,607	43,713	21,857	95.01	0.20	1.32	3.46
10 Iraq Hope & Peace	30,663	9,993	40,656	20,328	100.00	0.00	0.00	0.00
11 Mobinil	29,603	20,028	49,631	24,816	47.75	40.82	3.64	7.79
12 Ford	28,083	29,603	57,686	28,843	69.03	24.84	1.81	4.32
13 Vodafone	27,670	16,604	44,274	22,137	59.97	29.18	0.98	9.87
14 Ncb	27,376	34,834	62,210	31,105	47.24	43.16	1.78	7.83
15 Doha Asian Games	26,830	101	26,931	13,466	61.66	33.93	3.43	0.98
16 Nokia	26,766	36,077	62,843	31,422	24.16	49.30	17.99	8.55
17 Watani - Uae	24,507	0	24,507	12,254	94.96	5.04	0.00	0.00
18 Emaar	24,418	18,361	42,779	21,390	44.03	53.11	2.72	0.14
19 Knorr	23,908	21,803	45,711	22,856	99.75	0.02	0.23	0.00
20 Lipton	23,867	36,619	60,486	30,243	94.45	1.30	0.18	4.06
21 New Boy	23,367	16,186	39,553	19,777	99.91	0.06	0.03	0.00
22 Pantene	22,163	17,773	39,936	19,968	94.84	0.20	4.48	0.48
23 Dubai Properties	20,836	10,024	30,860	15,430	57.32	38.04	4.47	0.16
24 Samsung	20,291	16,832	37,123	18,562	42.22	42.41	11.15	4.22
25 Maggi	19,727	11,862	31,589	15,795	97.57	0.11	1.36	0.95
26 Sunsilk	19,629	24,860	44,489	22,245	95.18	0.33	1.65	2.84
27 Nissan	19,233	22,891	42,124	21,062	27.17	50.13	13.15	9.56
28 Al Marai	18,998	9,931	28,929	14,465	51.06	10.67	0.56	37.70
29 Lux	17,666	19,005	36,671	18,336	93.47	0.21	3.72	2.60
30 Etisalat	17,530	7,309	24,839	12,420	59.53	32.09	4.71	3.67

*OT=Radio+OutDoor+Cinema

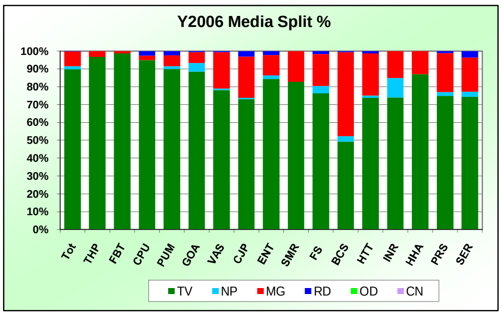


PAN ARAB - Y2006

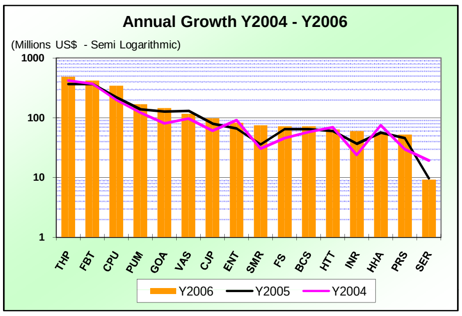
Millions US$ 2316 ▲ + 24%

Advertising Expenditure for Chapters (Millions US$) Y2004 - 2006(Jan - Dec)

						%Var'n	Media Split %					
Chapter	**Abbreviation**	**Y2004**	**Y2005**	**Y2006**	**Sh%**	**Y06/05**	**TV**	**NP**	**MG**	**RD**	**OD**	**CN**
Toiletries Hygiene/ House Care Products	THP	418	368	484	21	32	96	0	3	*	0	0
Food Beverages And Tobacco	FBT	369	367	419	18	14	98	0	1	*	0	0
Communications & Public Utilities	CPU	196	220	342	15	56	95	*	3	3	0	0
Publishig Media	PUM	120	139	169	7	22	90	2	6	2	0	0
Government/Organization Advertising	GOA	80	127	146	6	15	89	5	6	1	0	0
Vehicles,Accessories & Supply	VAS	96	131	116	5	-11	78	1	20	1	0	0
Clothing,Jewellery & Personal Acs	CJP	60	80	98	4	23	73	1	23	3	0	0
Entertainment	ENT	91	67	82	4	24	84	2	11	2	0	0
Shopping Malls & Retail Stores	SMR	30	36	75	3	110	82	*	17	*	0	0
Financial Services	FS	46	65	72	3	12	76	4	18	2	0	0
Business/Construct Equip. & Supply	BCS	57	65	72	3	11	49	3	47	1	0	0
Hotel, Travel & Tourism	HTT	69	60	64	3	6	74	1	24	1	0	0
Insurance & Real Estate	INR	24	37	60	3	63	74	11	15	0	0	0
Household Appliances	HHA	74	56	54	2	-5	87	*	13	*	0	0
Professional Services	PRS	30	46	53	2	15	75	2	22	1	0	0
Other Services	SER	19	10	9	0	-5	74	3	19	4	0	0
Total		**1,779**	**1,872**	**2,316**	**100**	**24**	**90**	**2**	**8**	**0**	**0**	**0**



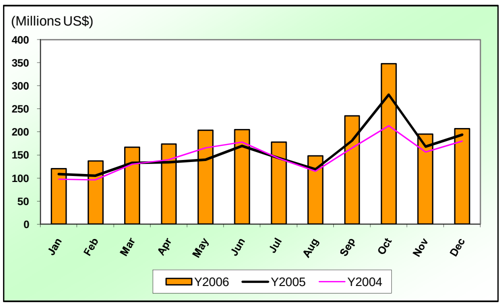
Y2006 Media Split %



Annual Growth Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

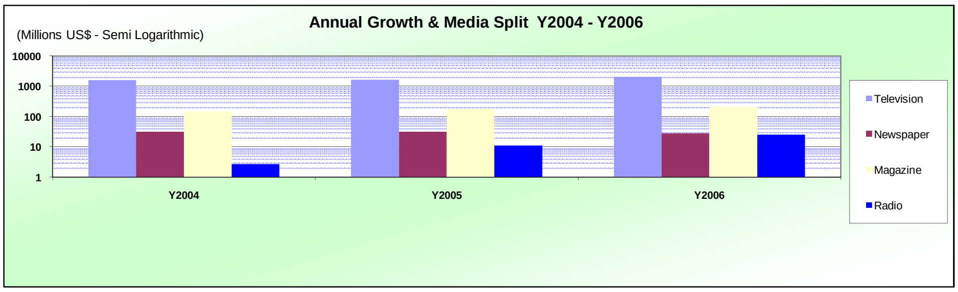
Monthly Spend Analysis (Millions US$)Y2004 - 2006



				Var'n %
Period	**Y2004**	**Y2005**	**Y2006**	**Y06/05**
Jan	97	108	120	11
Feb	96	105	137	31
Mar	130	132	166	26
Apr	140	134	174	30
May	165	139	204	46
Jun	178	169	205	21
Jul	143	143	178	25
Aug	115	119	148	24
Sep	166	181	235	30
Oct	213	280	348	24
Nov	157	168	195	16
Dec	180	194	207	7
Total	**1779**	**1872**	**2316**	**24**

Overall Media Split Analysis (Millions US$)

Media	**Y2004**		**Y2005**		**Y2006**		**Var'n %**	**Growth Index***	
	Value	**Sh%**	**Value**	**Sh%**	**Value**	**Sh%**	**Y2005/2006**	**Y06**	**Y05**
Television	1,596	90	1,649	88	2054	89	25	129	103
Newspaper	32	2	32	2	28	1	-12	88	100
Magazine	148	8	179	10	208	9	16	141	121
Radio	3	0	11	1	25	1	126	935	414
Total	**1,779**	**100**	**1,872**	**100**	**2,316**	**100**	**24**	**130**	**105**



Annual Growth & Media Split Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

Top Brands Y2006 (000 US$)

Television Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Dove	39405	36
2	Galaxy	31633	68
3	Iraq Hope & Peace	30662	275
4	Johnson & Johnson	28963	258
5	Saudi Telecomm	27482	50
6	Mobily	24468	80
7	New Boy	23081	48
8	Knorr	22888	11
9	Pepsi	21575	0
10	Lipton	20757	-36
11	Coca Cola	20040	6
12	Maggi	18509	112
13	Sunsilk	16742	-23
14	Fulla	16713	42
15	Al Safi Danone	15189	25

Newspapers Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Tatweer	493	N
2	Abu Dhabi Inv. House	480	N
3	Shell	345	203
4	Rolex	341	15
5	Royal City	341	E
6	Hewlett Packard	317	31
7	Bawadi	286	N
8	Emaar	278	-74
9	Tameer	270	N
10	Arab Bank	249	17
11	Manazel	237	N
12	Al Khairan R.e.c	221	N
13	Saraya Aqaba	218	N
14	Talaat Moustaf.group	206	N
15	Dubai Investment	206	N

Magazines Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Nokia	2428	-21
2	Hewlett Packard	2368	9
3	Toyota	1470	38
4	Rolex	1456	4
5	Samsung	1401	0
6	Nissan	1286	-53
7	B.m.w.	1154	30
8	Mitsubishi	1135	214
9	Mercedes	1124	41
10	Omega	1062	44
11	Cmn	1042	55
12	Land Rover	1033	257
13	Jaguar	1008	254
14	Xerox	996	229
15	Canon	957	-54

Radio Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Jeddah Festival	1509	137
2	Drosh	1046	219
3	Sabb	735	157
4	Projaih	703	-6
5	Ajlan _ Bros.	613	N
6	Mobily	533	80
7	Botcheny	468	211
8	Chevrolet	316	E
9	Nescafe	257	E
10	Domino`s Pizza	248	E
11	Motorola	242	N
12	Ajmal	242	118
13	Lebanon Embassy	233	N
14	Abdullatif Jamil	216	82
15	Jungle Land	202	E

E - Exceeding the limit >300%   N - New

PAN ARAB - Y2006

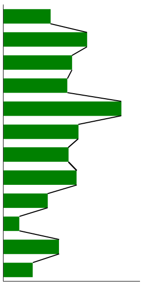
ADVERTISING SPACE ALLOCATION AND POSITIONING

Millions US$ 2316 ▲ + 24%

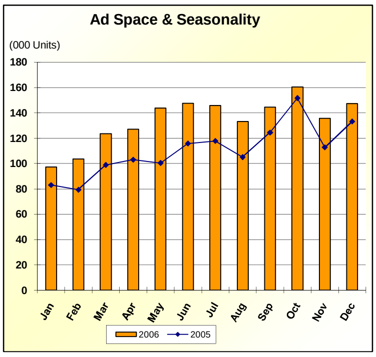
Thousand SESU 1611 ▲ + 21%

TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2006/2005Var %



Period	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
	2006	2005	% Var'n	2006	% Var'n	2006	% Var'n	2006	% Var'n
January	97437	83139	17	276	-9	2770	8	93215	16
February	103767	79471	31	333	-18	2695	17	99731	30
March	123704	98961	25	368	-11	3122	26	119032	25
April	127234	103163	23	374	-6	3126	9	122230	23
May	143839	100538	43	404	0	3427	17	136656	42
June	147596	115854	27	291	-32	3580	29	140044	26
July	145842	117840	24	329	-33	2977	9	138201	22
August	133296	105173	27	222	-48	2086	8	129389	27
September	144598	124519	16	335	-28	3403	12	135814	14
October	160419	151639	6	307	-31	3647	18	151814	4
November	135744	112855	20	447	19	3942	13	129741	20
December	147473	133248	11	352	-14	3732	-8	141890	11
	1610948	**1326400**	**21**	**4039**	**-19**	**38507**	**12**	**1537758**	**21**

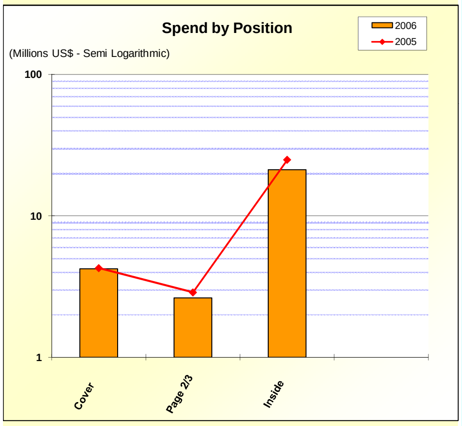

Ad Space & Seasonality

Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

NEWSPAPERS

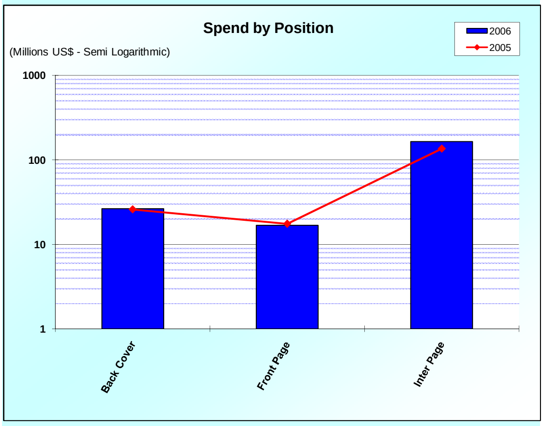
Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Cover	4	15	4	13	-1
Page 2/3	3	9	3	9	-9
Inside	21	76	25	78	-15
	28	**100**	**32**	**100**	**-12**


Spend by Position

(Millions US$ - Semi Logarithmic)

MAGAZINES

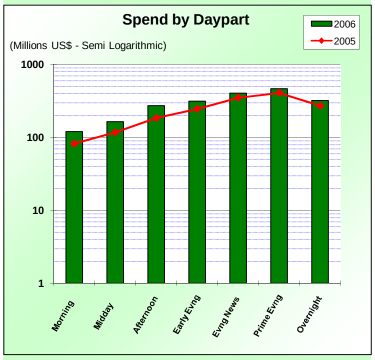
Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Back Cover	26	13	26	14	2
Front Page	17	8	18	10	-4
Inter Page	165	79	136	76	22
	208	**100**	**179**	**100**	**16**


Spend by Position

(Millions US$ - Semi Logarithmic)

TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Morning	120	6	82	5	46
Midday	164	8	117	7	41
Afternoon	271	13	184	11	47
Early Evng	313	15	245	15	28
Evng News	404	20	349	21	16
Prime Evng	463	23	404	24	15
Overnight	319	16	269	16	18
	2054	**100**	**1649**	**100**	**25**


Spend by Daypart

(Millions US$ - Semi Logarithmic)

TOP 30 LEAGUE OF Y2006 (000 US$)

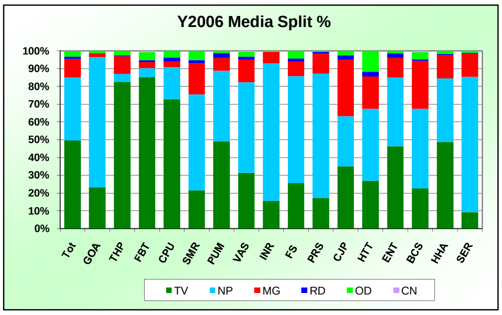
Rank & Brand	JANUARY - DECEMBER		2 YEAR		MEDIA SPLIT % - JAN - DEC 2006			
	2006	2005	TOTAL	AVG	TV	NP	MG	OT*
1 Dove	40,048	29,350	69,398	34,699	98.39	0.00	1.45	0.16
2 Galaxy	31,760	18,870	50,630	25,315	99.60	0.00	0.40	0.00
3 Iraq Hope & Peace	30,662	8,517	39,179	19,589	100.00	0.00	0.00	0.00
4 Johnson & Johnson	29,029	8,142	37,171	18,586	99.77	0.00	0.23	0.00
5 Saudi Telecomm	28,252	19,174	47,426	23,713	97.27	0.12	1.90	0.71
6 Mobily	25,201	14,337	39,538	19,769	97.09	0.09	0.69	2.12
7 New Boy	23,081	15,572	38,653	19,326	100.00	0.00	0.00	0.00
8 Knorr	22,912	20,711	43,623	21,812	99.89	0.00	0.11	0.00
9 Pepsi	22,129	21,818	43,947	21,974	97.50	0.00	2.42	0.08
10 Lipton	20,763	32,668	53,431	26,715	99.97	0.00	0.03	0.00
11 Coca Cola	20,303	19,017	39,320	19,660	98.71	0.00	1.29	0.00
12 Maggi	18,521	8,764	27,285	13,643	99.94	0.00	0.07	0.00
13 Sunsilk	16,997	21,920	38,917	19,459	98.50	0.00	0.71	0.79
14 Fulla	16,713	11,751	28,464	14,232	100.00	0.00	0.00	0.00
15 Ford	15,377	14,215	29,592	14,796	98.00	0.09	1.89	0.01
16 Al Safi Danone	15,195	12,276	27,471	13,735	99.96	0.00	0.04	0.00
17 Lux	14,758	17,565	32,323	16,161	98.09	0.00	1.49	0.42
18 Pantene	14,341	8,204	22,545	11,273	98.20	0.00	1.80	0.00
19 Dettol	14,052	8,855	22,907	11,453	100.00	0.00	0.00	0.00
20 Doha Asian Games	13,550	0	13,550	6,775	98.43	0.00	1.57	0.00
21 Signal	13,483	15,438	28,921	14,461	100.00	0.00	0.00	0.00
22 Chevrolet	13,209	20,266	33,475	16,738	93.09	0.43	4.09	2.39
23 Dubai Properties	12,578	6,941	19,519	9,759	94.35	1.61	4.04	0.00
24 Fair & Lovely	12,222	12,830	25,052	12,526	99.21	0.00	0.50	0.28
25 Ncb	12,199	21,885	34,084	17,042	98.21	0.00	1.52	0.26
26 Vodafone	11,595	6,998	18,593	9,297	99.96	0.05	0.00	0.00
27 Close-up	11,383	10,637	22,020	11,010	99.52	0.00	0.00	0.48
28 Tang	10,921	7,631	18,552	9,276	99.77	0.00	0.23	0.00
29 Head & Shoulders	10,515	6,557	17,072	8,536	99.95	0.00	0.05	0.00
30 Toyota	10,463	13,658	24,121	12,061	85.75	0.12	14.05	0.09

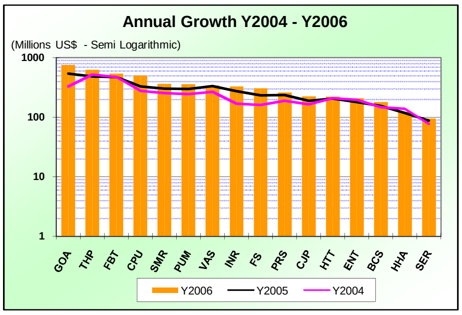
*OT=Radio+OutDoor+Cinema

AGCC, PAN ARAB & ARASIAN MEDIA MARKETS Y2006

Advertising Expenditure for Chapters (Millions US$) Y2004 - 2006(Jan - Dec)

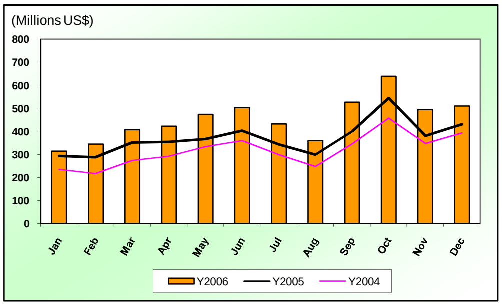
						%Var'n	Media Split %					
Chapter	**Abbreviation**	**Y2004**	**Y2005**	**Y2006**	**Sh%**	**Y06/05**	**TV**	**NP**	**MG**	**RD**	**OD**	**CN**
Government/Organization Advertising	GOA	327	542	753	14	39	23	73	2	*	1	*
Toiletries Hygiene/ House Care Products	THP	520	484	629	12	30	83	5	10	1	3	*
Food Beverages And Tobacco	FBT	469	476	536	10	13	85	5	3	1	5	1
Communications & Public Utilities	CPU	277	330	500	9	51	73	18	3	2	4	*
Shopping Malls & Retail Stores	SMR	253	304	361	7	19	22	54	18	2	5	*
Publishig Media	PUM	243	300	359	7	20	49	40	7	3	1	0
Vehicles,Accessories & Supply	VAS	266	333	340	6	2	31	51	13	2	3	1
Insurance & Real Estate	INR	169	273	329	6	20	16	77	6	*	1	*
Financial Services	FS	160	233	306	6	31	26	60	8	2	4	*
Professional Services	PRS	189	236	259	5	10	17	70	11	1	1	*
Clothing,Jewellery & Personal Acs	CJP	164	189	223	4	18	35	28	32	3	3	*
Hotel, Travel & Tourism	HTT	208	207	222	4	7	27	40	18	3	12	*
Entertainment	ENT	195	180	209	4	16	46	39	11	3	2	*
Business/Construct Equip. & Supply	BCS	148	154	181	3	17	23	45	27	1	4	1
Household Appliances	HHA	137	118	123	2	4	49	36	13	1	2	*
Other Services	SER	77	88	95	2	9	9	76	13	1	1	0
Total		**3,802**	**4,450**	**5,425**	**100**	**22**	**50**	**36**	**10**	**1**	**3**	**0**


Y2006 Media Split %


Annual Growth Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

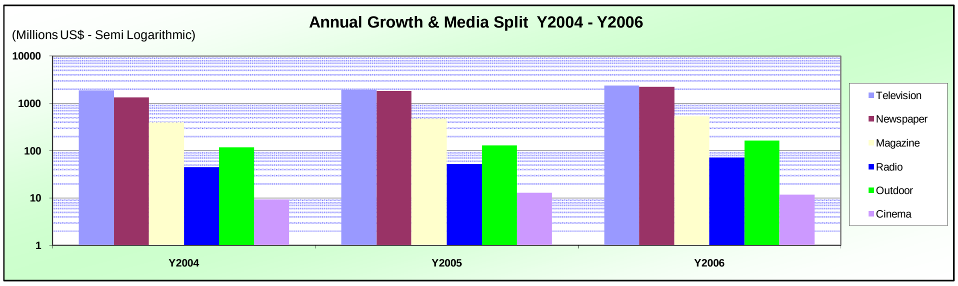
Monthly Spend Analysis (Millions US$)Y2004 - 2006


(Millions US$)

				Var'n %
Period	**Y2004**	**Y2005**	**Y2006**	**Y06/05**
Jan	235	293	314	7
Feb	217	287	344	20
Mar	274	350	407	16
Apr	292	354	422	19
May	334	367	473	29
Jun	360	403	503	25
Jul	299	343	432	26
Aug	247	298	360	21
Sep	347	400	527	32
Oct	457	544	640	18
Nov	348	380	494	30
Dec	393	430	510	19
Total	**3802**	**4450**	**5425**	**22**

Overall Media Split Analysis (Millions US$)

Media	**Y2004**		**Y2005**		**Y2006**		**Var'n %**	**Growth Index***	
	Value	**Sh%**	**Value**	**Sh%**	**Value**	**Sh%**	**Y2005/2006**	**Y06**	**Y05**
Television	1,885	50	1,934	43	2389	44	23	127	103
Newspaper	1,349	35	1,841	41	2,257	42	23	167	136
Magazine	395	10	479	11	533	10	11	135	121
Radio	45	1	52	1	72	1	38	160	117
Outdoor	119	3	130	3	162	3	25	137	110
Cinema	9	0	13	0	12	0	-8	127	139
Total	**3,802**	**100**	**4,450**	**100**	**5,425**	**100**	**22**	**143**	**117**


Annual Growth & Media Split Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

Millions US$ 5425 ▲ + 22%

Top Brands Y2006 (000 US$)

Television Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Dove	42087	41
2	Galaxy	33252	67
3	Saudi Telecomm	33153	49
4	Iraq Hope & Peace	30662	275
5	Mobily	30247	98
6	Johnson & Johnson	29718	260
7	Pepsi	23884	3
8	Knorr	23711	12
9	Watani-uae	23271	E
10	New Boy	23081	48
11	Lipton	22234	-35
12	Coca Cola	21524	10

Newspapers Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Chevrolet	17488	53
2	Mobily	16615	35
3	Toyota	14264	2
4	Emaar	12252	-25
5	Ncb	11814	85
6	Nokia	11284	-33
7	Saudi Telecomm	10754	64
8	Doha Asian Games	9034	E
9	Panasonic	8037	34
10	Hewlett Packard	7944	51
11	Nissan	7931	-6
12	Sony Ericsson	7856	69

Magazines Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Nokia	4384	-23
2	Damas	3359	31
3	Hewlett Packard	3068	19
4	Toyota	3064	-7
5	Rolex	2742	-2
6	B.m.w.	2653	38
7	Mitsubishi	2422	98
8	Omega	2391	22
9	Nissan	2259	-51
10	Panasonic	2134	51
11	Samsung	2025	6
12	Sony	1915	-12

Radio Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Jeddah Festival	2180	82
2	Drosh	2107	200
3	Toyota	1610	E
4	Sabb	1207	129
5	Projaih Head Wear	1164	-17
6	Mobily	1048	113
7	Mobil	1030	62
8	British Airways	1018	E
9	Chevrolet	980	173
10	Ajlan & Bros.	964	N
11	Botcheny	748	103
12	Ncci	620	135

Outdoor Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Al Marai	7118	E
2	Mobily	6764	63
3	Saudi Telecomm	6676	154
4	Mcdonald`s	4548	47
5	Burger King	4059	40
6	Kentucky	3309	10
7	Toyota	3131	186
8	Damas	2656	1
9	Al Tazaj-fakieh	2531	-13
10	Hardees	2264	29
11	Pizza Hut	2113	13
12	Motorola	2097	E

E - Exceeding the limit >300%   N - New

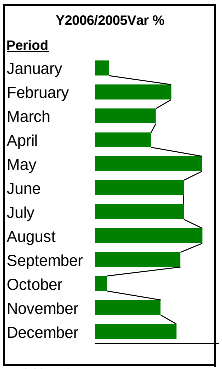
AGCC, PAN ARAB & ARASIAN MEDIA MARKETS Y2006

Millions US$ 5425 ▲ + 22%

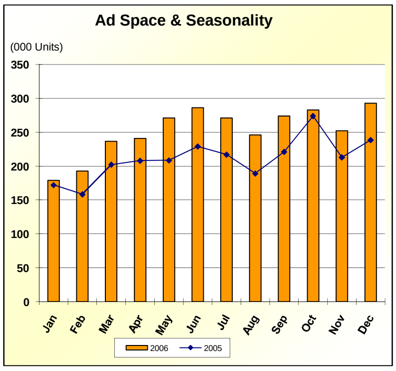
ADVERTISING SPACE ALLOCATION AND POSITIONING

Thousand SESU 3026 ▲ + 20%

TOTAL MARKET ADVERTISING SPACE ALLOCATION



ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
2006	2005	% Var'n	2006	% Var'n	2006	% Var'n	2006	% Var'n
178837	172092	4	38935	21	9161	-1	107933	4
192615	158567	21	37438	15	10096	13	120373	32
236742	202154	17	42588	11	11987	18	146730	22
240681	207898	16	41953	14	11960	2	149148	18
271305	208440	30	43927	11	13162	15	164676	37
286104	228865	25	48329	23	13956	19	175013	30
271173	216947	25	43771	27	10609	9	170892	27
246303	189162	30	37357	13	7304	4	162482	37
274164	220979	24	46160	20	12030	10	175872	28
283025	273610	3	43013	0	13925	12	207754	14
252185	212850	18	50681	34	13679	12	163130	26
292874	238221	23	54326	39	17038	18	173198	19
3026007	**2529785**	**20**	**528477**	**19**	**144908**	**11**	**1917200**	**24**

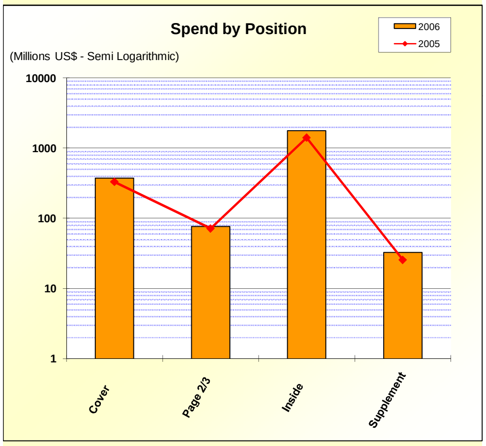


Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

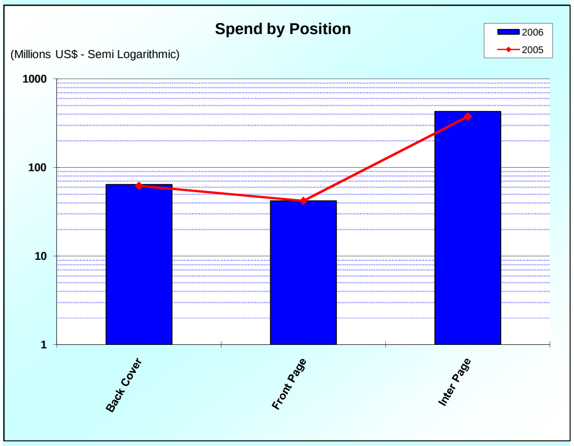
NEWSPAPERS

Spend by Position	2006		2005		Var'n %
(Millions US $)	Value	%	Value	%	
Cover	373	17	332	18	12
Page 2/3	77	3	72	4	7
Inside	1775	79	1412	77	26
Supplement	33	1	26	1	27
	2257	**100**	**1841**	**100**	**23**



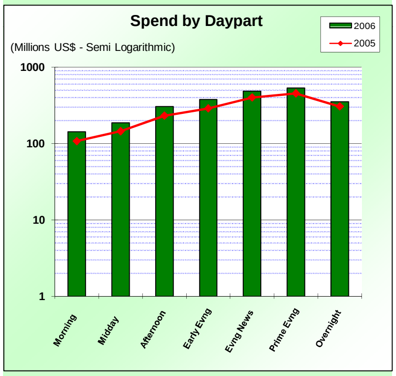
MAGAZINES

Spend by Position	2006		2005		Var'n %
(Millions US $)	Value	%	Value	%	
Back Cover	64	12	62	13	3
Front Page	42	8	42	9	0
Inter Page	427	80	375	78	14
	533	**100**	**479**	**100**	**11**



TELEVISION - KSA Time

Spend by Daypart	2006		2005		Var'n %
(Millions US $)	Value	%	Value	%	
Morning	143	6	108	6	33
Midday	188	8	145	8	29
Afternoon	306	13	232	12	32
Early Evng	379	16	289	15	31
Evng News	484	20	402	21	20
Prime Evng	535	22	454	23	18
Overnight	355	15	306	16	16
	2389	**100**	**1934**	**100**	**23**



TOP 30 LEAGUE OF Y2006 (000 US$)

Rank & Brand	JANUARY - DECEMBER		2 YEAR		MEDIA SPLIT % - JAN - DEC 2006			
	2006	2005	TOTAL	AVG	TV	NP	MG	OT*
1 Mobily	55,333	33,222	88,555	44,278	54.66	30.03	1.19	14.12
2 Saudi Telecomm	52,068	33,061	85,129	42,565	63.67	20.65	2.10	13.58
3 Dove	44,630	31,196	75,826	37,913	94.30	0.05	3.73	1.91
4 Chevrolet	35,226	35,921	71,147	35,574	41.52	49.65	4.76	4.08
5 Galaxy	33,935	20,465	54,400	27,200	97.99	0.13	1.67	0.21
6 Toyota	32,988	32,727	65,715	32,858	32.86	43.24	9.29	14.61
7 Johnson & Johnson	31,114	9,545	40,659	20,330	95.51	0.22	1.23	3.04
8 Iraq Hope & Peace	30,663	9,125	39,788	19,894	100.00	0.00	0.00	0.00
9 Pepsi	29,041	27,194	56,235	28,118	82.24	7.67	2.56	7.53
10 Ncb	27,365	34,826	62,191	31,096	47.26	43.17	1.74	7.83
11 Ford	26,630	27,123	53,753	26,877	69.53	24.44	1.75	4.28
12 Doha Asian Games	25,805	99	25,904	12,952	60.67	35.01	3.30	1.02
13 Watani-uae	24,501	2,786	27,287	13,644	94.98	5.02	0.00	0.00
14 Knorr	23,747	21,438	45,185	22,593	99.85	0.02	0.13	0.00
15 Coca Cola	23,544	21,013	44,557	22,279	91.42	2.19	2.29	4.10
16 Lipton	23,254	35,860	59,114	29,557	95.61	1.32	0.09	2.98
17 New Boy	23,099	15,572	38,671	19,336	99.92	0.05	0.03	0.00
18 Nokia	22,550	30,157	52,707	26,354	23.29	50.04	19.44	7.22
19 Emaar	22,384	17,145	39,529	19,765	42.32	54.74	2.89	0.06
20 Dubai Properties	20,710	9,826	30,536	15,268	57.67	37.67	4.50	0.16
21 Maggi	19,189	9,209	28,398	14,199	98.87	0.04	1.09	0.00
22 Al Marai	18,963	9,892	28,855	14,428	51.16	10.56	0.52	37.77
23 Sunsilk	18,751	23,021	41,772	20,886	96.54	0.28	1.21	1.96
24 Samsung	18,309	14,766	33,075	16,538	45.53	39.85	11.06	3.56
25 Etisalat	17,504	7,289	24,793	12,397	59.57	32.07	4.68	3.68
26 Al Safi Danone	17,349	15,304	32,653	16,327	94.88	0.59	0.49	4.04
27 Lux	17,133	18,339	35,472	17,736	94.82	0.12	2.97	2.10
28 Fulla	16,720	11,775	28,495	14,248	99.96	0.04	0.00	0.00
29 Pantene	16,086	10,458	26,544	13,272	94.78	0.28	4.94	0.00
30 Dettol	15,824	9,806	25,630	12,815	97.57	0.05	2.38	0.00

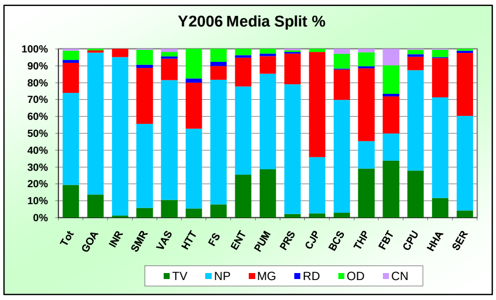
*OT=Radio+OutDoor+Cinema

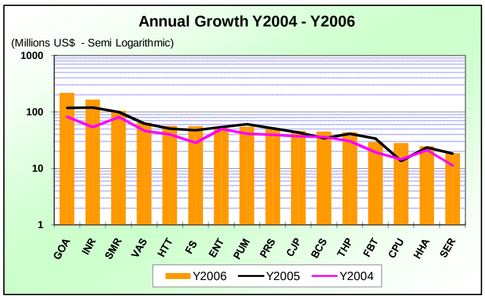
UNITED ARAB EMIRATES - Y2006

Millions US$ 1063 ▲ + 22%

Advertising Expenditure for Chapters (Millions US$) Y2004 - 2006(Jan - Dec)

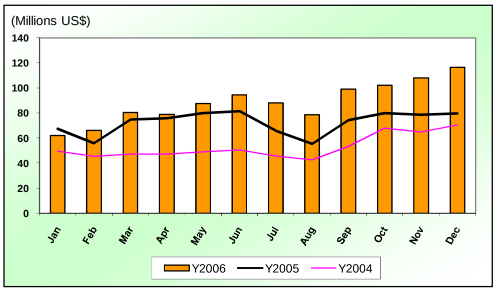
Chapter	Abbreviation	Y2004	Y2005	Y2006	Sh%	%Var'n Y06/05	Media Split % TV	NP	MG	RD	OD	CN
Government/Organization Advertising	GOA	82	117	218	21	86	14	84	1	*	1	*
Insurance & Real Estate	INR	54	119	166	16	40	1	93	5	*	*	*
Shopping Malls & Retail Stores	SMR	81	99	105	10	6	6	50	33	2	9	1
Vehicles,Accessories & Supply	VAS	47	62	65	6	4	11	71	13	1	3	2
Hotel, Travel & Tourism	HTT	40	50	57	5	13	5	47	27	2	18	*
Financial Services	FS	29	48	56	5	18	8	74	8	2	8	*
Entertainment	ENT	50	54	55	5	3	25	52	17	2	4	*
Publishig Media	PUM	41	61	54	5	-10	29	56	10	2	3	*
Professional Services	PRS	40	51	51	5	-1	2	77	18	1	1	1
Clothing,Jewellery & Personal Acs	CJP	37	43	46	4	7	2	33	62	*	2	*
Business/Construct Equip. & Supply	BCS	36	34	45	4	31	3	67	18	1	9	3
Toiletries Hygiene/ House Care Products	THP	30	41	44	4	6	29	16	43	1	8	2
Food Beverages And Tobacco	FBT	19	34	29	3	-13	34	16	22	2	17	10
Communications & Public Utilities	CPU	15	14	28	3	105	28	60	8	2	3	1
Household Appliances	HHA	21	23	25	2	6	12	60	23	1	5	1
Other Services	SER	11	19	18	2	0	4	56	37	1	1	0
Total		**634**	**869**	**1,063**	**100**	**22**	**19**	**54**	**18**	**2**	**5**	**1**


Y2006 Media Split %


Annual Growth Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

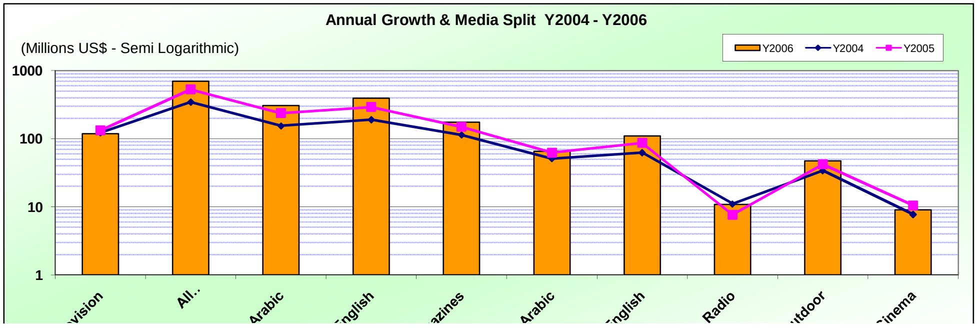
Monthly Spend Analysis (Millions US$)Y2004 - 2006


(Millions US$)

Period	Y2004	Y2005	Y2006	Var'n % Y06/05
Jan	50	67	62	-8
Feb	45	56	66	19
Mar	47	75	81	8
Apr	47	76	79	4
May	49	80	88	10
Jun	51	81	94	16
Jul	46	66	88	34
Aug	43	55	79	42
Sep	53	74	99	33
Oct	68	80	102	28
Nov	65	79	108	37
Dec	71	80	116	46
Total	**634**	**869**	**1063**	**22**

Overall Media Split Analysis (Millions US$)

Media	Y2004		Y2005		Y2006		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2005/2006	Y06	Y05
Television	123	19	132	15	119	11	-10	97	108
All Newspapers	**345**	**54**	**527**	**61**	**702**	**66**	**33**	**203**	**153**
Arabic	155	24	236	27	306	29	30	198	153
English	190	30	291	34	396	37	36	208	153
All Magazines	**113**	**18**	**149**	**17**	**175**	**16**	**18**	**155**	**131**
Arabic	51	8	62	7	65	6	5	128	122
English	62	10	87	10	110	10	27	176	139
Radio	11	2	8	1	11	1	41	98	69
Outdoor	34	5	42	5	47	4	13	140	123
Cinema	8	1	10	1	9	1	-14	116	136
Total	**634**	**100**	**869**	**100**	**1,063**	**100**	**22**	**168**	**137**


Annual Growth & Media Split Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

Top Brands Y2006 (000 US$)

Television Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Watani -uae	13313	E
2	Save Lebanon (UAE) Campaign	5941	N
3	Tatweer	3287	N
4	Uae Nat`l Election	2787	N
5	Etisalat	2192	E
6	Ford	2189	-37
7	Du	2087	N
8	Red Crescent Soc	1709	E
9	Dubai Int`l Awrd	1687	161
10	Dubai Summer Sr.	1466	-44
11	Sedar	1427	-27
12	Dove	1289	46

Newspapers Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Emaar	8240	3
2	Dubai Properties	6060	157
3	Uae Nat`l Election	6033	N
4	Etisalat	5412	66
5	Nokia	4919	-17
6	Better Homes	4696	17
7	Chevrolet	4377	110
8	Sony Ericsson	4252	165
9	Hewlett Packard	3249	88
10	Deyaar	3230	53
11	Vakson	3228	-28
12	Sorouh	3027	84

Magazines Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Damas	2833	20
2	Nokia	994	-42
3	Sony	944	-3
4	Panasonic	828	161
5	Toyota	814	-17
6	Burjuman	793	-3
7	Chopard	769	-13
8	B.m.w.	766	57
9	Showtime	722	45
10	Rolex	709	-16
11	Chevrolet	702	16
12	Marlboro	648	40

Radio Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Etihad	435	E
2	Uae Nat`l Election	303	N
3	Rak Bank	301	23
4	Nat`l B.dubai	264	-12
5	Honda	154	196
6	Mohamed Sharif	148	E
7	Etisalat	139	109
8	Chilis	138	E
9	Abu Dhabi Co-op	135	69
10	Du	132	N
11	Chevrolet	128	30
12	Emirates Post	127	E

Outdoor Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Damas	2656	1
2	Burger King	2119	90
3	Motorola	2097	E
4	Mcdonald`s	2081	-13
5	Kentucky	1386	19
6	Pure Gold Jewel.	1148	62
7	Hardees	1141	75
8	Pizza Hut	1060	44
9	Air Arabia	934	159
10	Alukkas Jewelery	857	E
11	Hsbc	847	12
12	Rak Bank	785	9

E - Exceeding the limit >300%   N - New

UNITED ARAB EMIRATES - Y2006

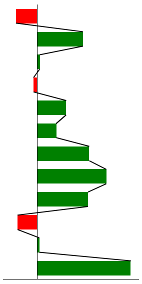
Millions US$ 1063 ▲ + 22%

ADVERTISING SPACE ALLOCATION AND POSITIONING

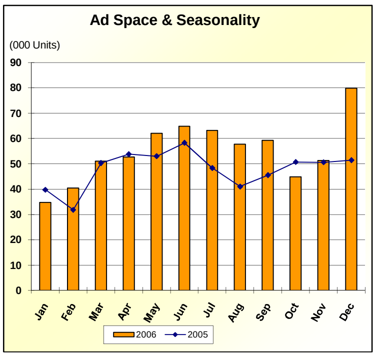
Thousand SESU 662 ▲ + 15%

TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2006/2005Var %



Period	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
	2006	2005	% Var'n	2006	% Var'n	2006	% Var'n	2006	% Var'n
January	34807	39801	-13	14853	14	3539	3	3516	-71
February	40495	31893	27	14603	17	4352	20	6057	9
March	51085	50322	2	17429	15	5361	29	6817	-55
April	52670	53836	-2	15994	15	5297	23	8391	-54
May	62078	53039	17	15991	0	5327	24	8958	-42
June	64848	58279	11	16989	8	6240	31	9780	-30
July	63184	48377	31	17989	29	4194	23	13121	24
August	57775	41048	41	16044	38	2599	9	13090	55
September	59230	45563	30	18709	18	5157	14	14675	111
October	44841	50727	-12	18665	8	5933	21	17304	69
November	51295	50628	1	21662	27	5625	13	11339	33
December	79877	51457	55	23098	49	6207	6	14289	89
	662186	**574969**	**15**	**212027**	**20**	**59829**	**18**	**127336**	**-4**

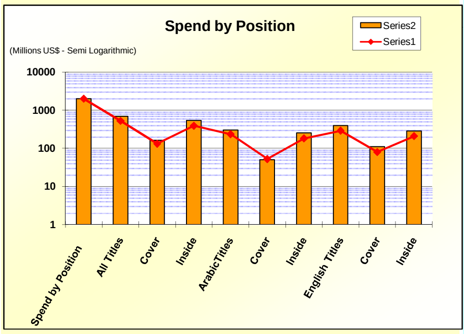


Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

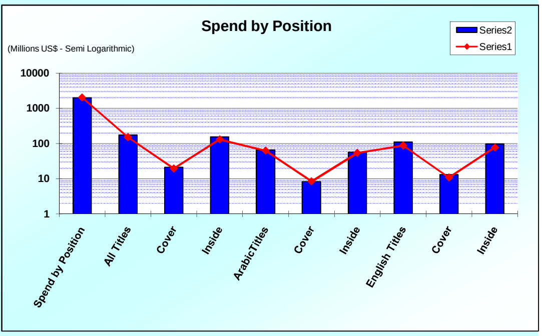
NEWSPAPERS

Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
All Titles	702	100	527	100	33
Cover	162	23	134	25	21
Inside	539	77	394	75	37
ArabicTitles	306	44	236	45	30
Cover	51	7	53	10	-4
Inside	255	36	183	35	39
English Titles	396	56	291	55	36
Cover	111	16	81	15	38
Inside	284	41	211	40	35
Total	**702**	**100**	**527**	**100**	**33**



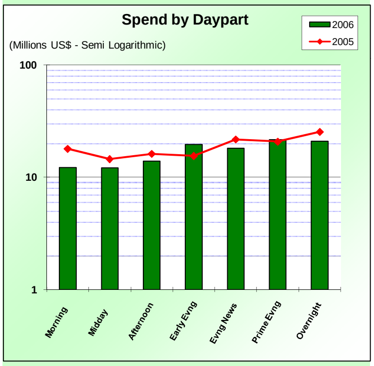
MAGAZINES

Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
All Titles	175	100	149	100	18
Cover	21	12	19	13	11
Inside	154	88	130	87	19
ArabicTitles	65	37	62	42	5
Cover	8	5	8	6	-1
Inside	57	33	54	36	6
English Titles	110	63	87	58	27
Cover	13	7	11	7	21
Inside	97	55	76	51	28
Total	**175**	**100**	**149**	**100**	**18**



TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Morning	12	10	18	14	-32
Midday	12	10	15	11	-17
Afternoon	14	12	16	12	-14
Early Evng	20	17	16	12	27
Evng News	18	15	22	16	-17
Prime Evng	22	18	21	16	4
Overnight	21	18	25	19	-18
	119	**100**	**132**	**100**	**-10**



TOP 30 LEAGUE OF Y2006 (000 US$)

Rank & Brand	JANUARY - DECEMBER		2 YEAR		MEDIA SPLIT % - JAN - DEC 2006			
	2006	2005	TOTAL	AVG	TV	NP	MG	OT*
1 Watani-uae	14,543	1,336	15,879	7,939	91.54	8.45	0.00	0.00
2 Emaar	9,147	8,474	17,621	8,811	7.90	90.09	1.87	0.14
3 Etisalat	8,772	3,609	12,381	6,191	24.99	61.69	6.51	6.81
4 Damas	7,208	5,862	13,070	6,535	3.91	19.66	39.31	37.12
5 Nokia	7,092	8,658	15,750	7,875	1.38	69.36	14.02	15.24
6 Dubai Properties	6,543	2,555	9,098	4,549	1.14	92.61	5.72	0.52
7 Chevrolet	6,474	3,761	10,235	5,117	15.37	67.61	10.85	6.17
8 Save Lebanon (UAE) Camp	6,298	0	6,298	3,149	94.33	4.97	0.00	0.70
9 Uae Nat`l Election	6,083	0	6,083	3,042	0.00	99.18	0.16	0.66
10 Motorola	5,404	1,246	6,650	3,325	13.67	30.75	11.45	44.13
11 Du	5,329	0	5,329	2,665	39.15	51.32	4.71	4.83
12 Sony Ericsson	5,199	2,362	7,561	3,781	0.00	81.78	9.16	9.07
13 Better Homes	5,032	4,185	9,217	4,609	0.00	93.33	6.58	0.10
14 Sony	4,763	4,362	9,125	4,562	1.33	62.19	19.81	16.67
15 Tatweer	4,603	13	4,616	2,308	71.42	28.46	0.12	0.00
16 Ford	4,041	5,341	9,382	4,691	54.16	29.10	2.90	13.85
17 Hewlett Packard	3,894	2,165	6,059	3,030	0.00	83.43	14.18	2.40
18 Tameer	3,673	2,235	5,908	2,954	17.58	73.94	8.34	0.15
19 Hsbc	3,640	2,978	6,618	3,309	5.29	64.39	5.47	24.85
20 Samsung	3,624	4,087	7,711	3,855	5.33	73.96	8.53	12.17
21 Adcb	3,566	1,630	5,196	2,598	15.29	62.48	12.63	9.61
22 Panasonic	3,418	2,370	5,788	2,894	6.08	69.58	24.22	0.14
23 Deyaar	3,418	2,134	5,552	2,776	0.00	94.50	4.67	0.83
24 Dubai Summer Sr.	3,289	3,487	6,776	3,388	44.58	42.10	4.68	8.64
25 Vakson	3,262	4,479	7,741	3,871	0.00	98.96	1.05	0.00
26 National Bonds	3,230	0	3,230	1,615	23.96	55.85	0.17	20.02
27 Sorouh	3,227	1,828	5,055	2,528	4.88	93.81	1.31	0.00
28 Dubai Islamic B.	3,144	2,238	5,382	2,691	0.78	89.51	2.59	7.13
29 Etihad	3,142	2,365	5,507	2,754	2.58	81.61	1.97	13.85
30 Nat`l B.dubai	3,114	4,408	7,522	3,761	0.48	75.11	14.64	9.78

*OT=Radio+OutDoor+Cinema

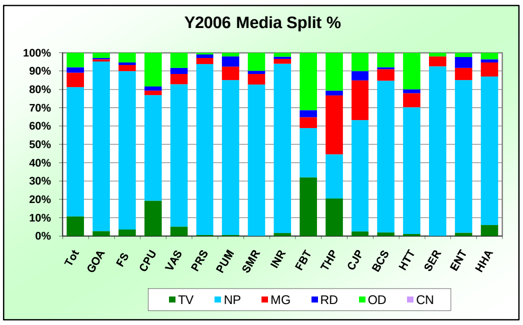
KINGDOM OF SAUDI ARABIA - Y2006

Millions US$ 978 ▲ + 7%

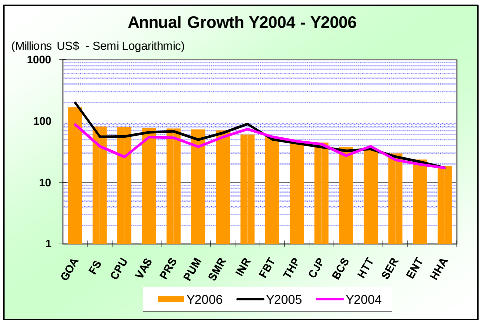
Advertising Expenditure for Chapters (Millions US$) Y2004 - 2006(Jan - Dec)

Chapter	Abbreviation	Y2004	Y2005	Y2006	Sh%	%Var'n Y06/05	Media Split % TV	NP	MG	RD	OD	CN
Government/Organization Advertising	GOA	88	198	167	17	-16	3	93	1	1	3	0
Financial Services	FS	39	55	82	8	48	4	87	3	2	5	0
Communications & Public Utilities	CPU	26	56	80	8	41	19	58	3	2	18	0
Vehicles,Accessories & Supply	VAS	55	65	78	8	19	5	78	6	3	8	0
Professional Services	PRS	54	68	76	8	12	1	93	3	2	1	0
Publishig Media	PUM	38	50	74	8	48	1	85	7	6	2	0
Shopping Malls & Retail Stores	SMR	55	64	70	7	10	*	83	6	2	10	0
Insurance & Real Estate	INR	74	90	61	6	-32	2	92	3	1	2	0
Food Beverages And Tobacco	FBT	55	50	54	6	7	32	27	6	4	31	0
Toiletries Hygiene/ House Care Products	THP	47	44	48	5	9	20	24	32	3	21	0
Clothing,Jewellery & Personal Acs	CJP	42	38	45	5	19	3	61	22	5	10	0
Business/Construct Equip. & Supply	BCS	27	33	38	4	16	2	83	6	1	8	0
Hotel, Travel & Tourism	HTT	39	35	35	4	1	1	69	8	2	20	0
Other Services	SER	23	26	30	3	12	*	92	5	*	2	0
Entertainment	ENT	20	22	24	2	10	2	84	7	6	2	0
Household Appliances	HHA	17	17	18	2	6	6	81	8	2	4	0
Total		**699**	**911**	**978**	**100**	**7**	**11**	**71**	**8**	**3**	**8**	**0**

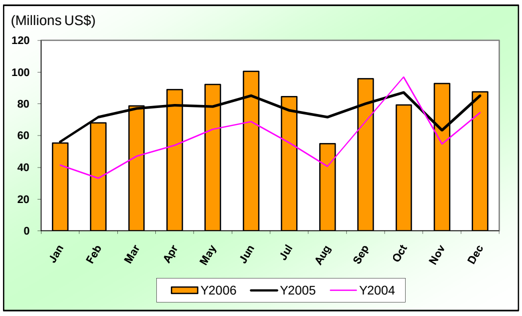
Y2006 Media Split %



Annual Growth Y2004 - Y2006



Monthly Spend Analysis (Millions US$)Y2004 - 2006

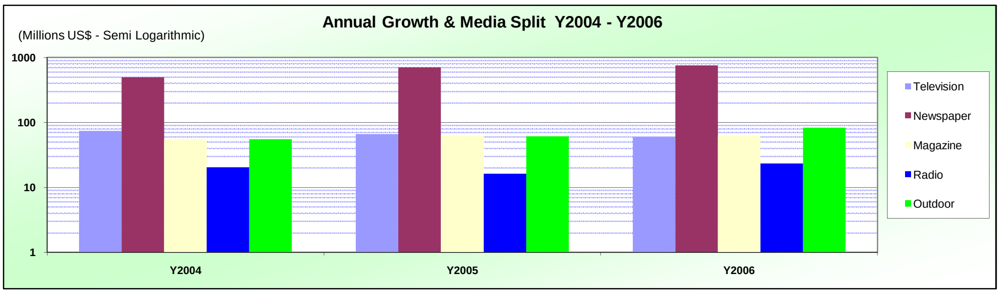


Period	Y2004	Y2005	Y2006	Var'n % Y06/05
Jan	41	56	55	-2
Feb	33	72	68	-5
Mar	47	77	79	2
Apr	54	79	89	12
May	64	78	92	18
Jun	69	85	101	18
Jul	56	76	85	11
Aug	41	72	55	-23
Sep	69	80	96	19
Oct	97	87	79	-9
Nov	55	63	93	47
Dec	75	85	88	3
Total	**699**	**911**	**978**	**7**

Overall Media Split Analysis (Millions US$)

Media	Y2004		Y2005		Y2006		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2005/2006	Y06	Y05
Television	74	11	66	7	59	6	-10	80	89
Newspaper	495	71	706	77	751	77	6	152	143
Magazine	55	8	63	7	62	6	-1	113	114
Radio	20	3	16	2	23	2	42	115	80
Outdoor	55	8	61	7	83	8	37	151	111
Total	**699**	**100**	**911**	**100**	**978**	**100**	**7**	**140**	**130**

Annual Growth & Media Split Y2004 - Y2006



Top Brands Y2006 (000 US$)

Television Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Saudi Telecomm	4993	112
2	Mobily	4656	234
3	Save Lebanon (ksa) Campaign	1314	N
4	Al Safi Danone	1230	-22
5	Dettol	1192	100
6	Chevrolet	976	-25
7	Al Marai	938	-46
8	Ncb	919	-81
9	Head & Shoulders	894	-25
10	Rabea	887	7
11	Ford	773	71
12	Kraft	685	82

Newspapers Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Mobily	16579	36
2	Ncb	11813	85
3	Saudi Telecomm	10716	64
4	Chevrolet	9109	64
5	Al Jawal	7669	2
6	Samba	7178	37
7	Toyota	6806	7
8	Sabb	5877	37
9	Riyad Bank	5518	-9
10	Al Rajhi Bank	5292	64
11	Arab National Bank	4710	43
12	Nokia	4606	-38

Magazines Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Sabb	770	161
2	Al Jawal	548	-5
3	Rolex	443	58
4	Saad Special. Hospital	423	61
5	Mobily	419	-23
6	Olay	416	-17
7	Omega	411	11
8	Dettol	373	8
9	Saudi Telecomm	370	-7
10	Nokia	365	-12
11	Panasonic	342	47
12	Nissan	324	-24

Radio Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Toyota	1478	E
2	Drosh	1061	182
3	Mobil	1030	64
4	Jeddah Festival	672	20
5	Ncci	620	135
6	Mobily	515	163
7	Chevrolet	514	E
8	Sabb	473	96
9	Projaih	461	-29
10	Ajlan _ Bros.	351	N
11	Supreme C.tourism	301	-32
12	Lebanese Consul.	298	N

Outdoor Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Mobily	6764	63
2	Saudi Telecomm	6676	154
3	Al Marai	6394	E
4	Toyota	3043	205
5	Al Tazaj-fakieh	2517	-13
6	Ncb	2075	112
7	Arabian Oud	1591	144
8	Supreme C.tourism	1416	E
9	Al Rabie	1376	57
10	Sabb	1100	186
11	Obeikan	1024	154
12	Sony Ericsson	885	E

E - Exceeding the limit >300%   N - New

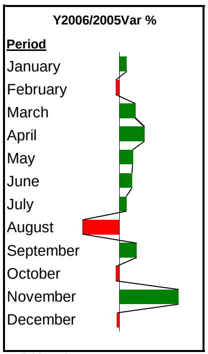
KINGDOM OF SAUDI ARABIA - Y2006

Millions US$ 978 ▲ + 7%

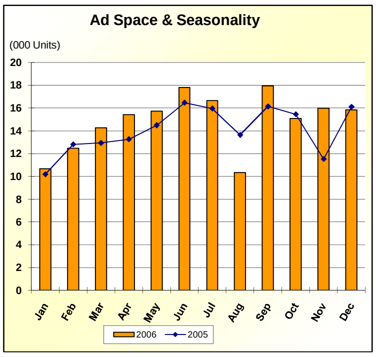
Thousand SESU 178 ▲ + 5%

ADVERTISING SPACE ALLOCATION AND POSITIONING

TOTAL MARKET ADVERTISING SPACE ALLOCATION



ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
2006	2005	% Var'n	2006	% Var'n	2006	% Var'n	2006	% Var'n
10674	10191	5	5791	6	706	-13	1164	-32
12484	12813	-3	7144	-7	765	16	1590	-31
14264	12939	10	8163	-1	917	3	2137	-27
15427	13265	16	8869	3	1056	6	1771	-32
15734	14498	9	9350	15	1235	12	1811	-23
17807	16471	8	10411	22	1274	8	2476	-11
16667	15965	4	8990	20	977	-3	1641	-52
10337	13650	-24	5391	-43	573	-7	1412	13
17959	16147	11	8740	8	1072	8	2510	-11
15094	15461	-2	6871	-22	1180	-15	2425	10
15980	11524	39	8802	39	1232	25	2042	30
15855	16112	-2	8122	-3	1268	-4	2351	8
178280	**169036**	**5**	**96642**	**1**	**12257**	**3**	**23330**	**-17**

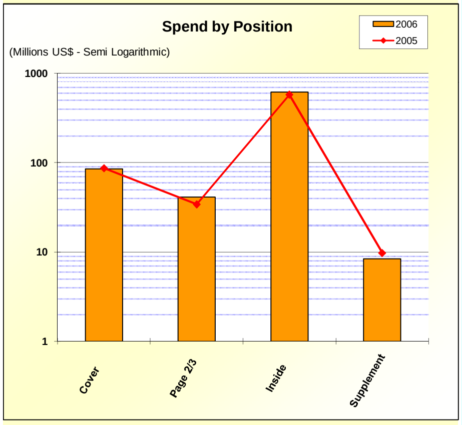


Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

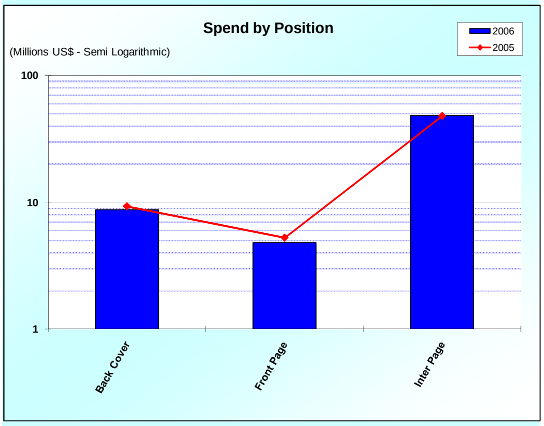
NEWSPAPERS

Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Cover	85	11	87	12	-2
Page 2/3	41	5	34	5	20
Inside	616	82	575	81	7
Supplement	8	1	10	1	-14
	751	100	706	100	6



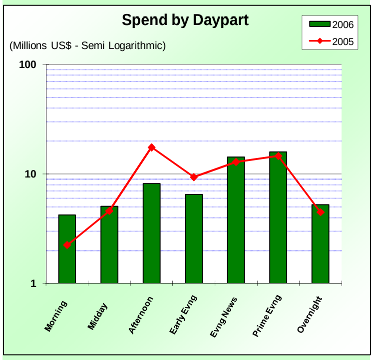
MAGAZINES

Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Back Cover	9	14	9	15	-6
Front Page	5	8	5	8	-9
Inter Page	48	78	48	77	1
	62	**100**	**63**	**100**	**-1**



TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2006		2005		Var'n
	Value	%	Value	%	%
Morning	4	7	2	3	88
Midday	5	9	5	7	11
Afternoon	8	14	18	27	-53
Early Evng	6	11	9	14	-31
Evng News	14	24	13	20	11
Prime Evng	16	27	15	22	9
Overnight	5	9	4	7	17
	59	**100**	**66**	**100**	**-10**



TOP 30 LEAGUE OF Y2006 (000 US$)

Rank & Brand	JANUARY - DECEMBER		2 YEAR		MEDIA SPLIT % - JAN - DEC 2006			
	2006	2005	TOTAL	AVG	TV	NP	MG	OT*
1 Mobily	28,932	18,434	47,366	23,683	16.09	57.30	1.45	25.16
2 Saudi Telecomm	22,947	12,044	34,991	17,496	21.76	46.70	1.61	29.93
3 Ncb	15,055	12,777	27,832	13,916	6.10	78.47	1.41	14.02
4 Toyota	11,891	9,128	21,019	10,509	3.71	57.24	1.03	38.02
5 Chevrolet	10,982	7,628	18,610	9,305	8.89	82.94	2.47	5.70
6 Al Marai	9,021	4,355	13,376	6,688	10.40	18.21	0.52	70.87
7 Sabb	8,479	5,222	13,701	6,851	3.07	69.31	9.08	18.54
8 Al Jawal	8,411	8,136	16,547	8,273	0.02	91.18	6.51	2.28
9 Samba	8,065	5,965	14,030	7,015	3.23	89.00	3.72	4.05
10 Al Rajhi Bank	6,220	3,931	10,151	5,075	2.26	85.08	5.14	7.51
11 Riyad Bank	5,808	6,388	12,196	6,098	0.00	95.00	4.60	0.39
12 Nokia	5,382	8,533	13,915	6,958	0.35	85.58	6.79	7.29
13 Arab National Bank	4,923	3,548	8,471	4,236	0.00	95.68	1.99	2.33
14 Gmc	4,178	2,645	6,823	3,412	3.64	76.66	2.47	17.24
15 Saudi French Bank	4,130	3,668	7,798	3,899	0.00	90.95	3.98	5.07
16 Saudi Invest. Bank	4,119	1,480	5,599	2,799	0.00	93.41	1.98	4.60
17 Sabic	4,054	1,554	5,608	2,804	15.50	73.24	0.00	11.25
18 Emaar	4,000	5,739	9,739	4,869	12.72	86.90	0.37	0.00
19 Supreme C.tourism	3,881	2,041	5,922	2,961	0.00	53.76	2.00	44.22
20 Al Jomaih	3,876	3,901	7,777	3,888	0.00	98.40	0.10	1.49
21 Hewlett Packard	3,723	2,584	6,307	3,153	0.00	95.76	2.34	1.90
22 Sony Ericsson	3,689	2,559	6,248	3,124	0.00	73.08	2.93	23.99
23 Al Bilad Bank	3,590	3,014	6,604	3,302	17.34	75.77	3.26	3.62
24 Ford	3,576	3,470	7,046	3,523	21.62	68.66	0.35	9.38
25 Nissan	3,394	4,197	7,591	3,796	0.00	76.82	9.54	13.64
26 Dubai Holding	3,209	1,244	4,453	2,226	0.00	99.29	0.70	0.00
27 Extra	3,050	2,681	5,731	2,866	0.00	92.68	1.69	5.64
28 Samsung	2,844	1,852	4,696	2,348	0.00	89.83	4.41	5.77
29 Gazzaz	2,832	4,278	7,110	3,555	0.00	90.81	9.08	0.12
30 Sayidaty	2,772	1,379	4,151	2,075	0.00	92.86	0.73	6.41

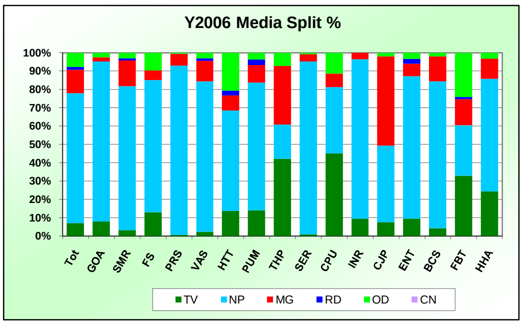
*OT=Radio+OutDoor+Cinema

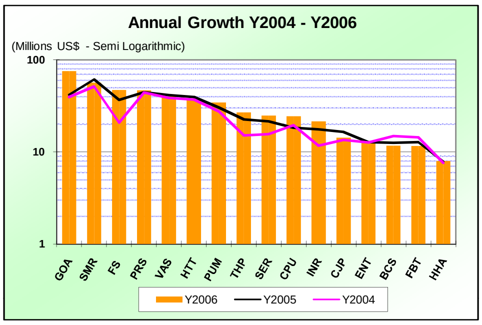
KUWAIT - Y2006

Millions US$ 494 ▲ + 13%

Advertising Expenditure for Chapters (Millions US$) Y2004 - 2006(Jan - Dec)

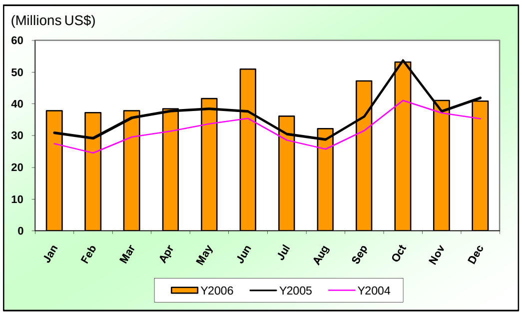
						%Var'n	Media Split %					
Chapter	**Abbreviation**	**Y2004**	**Y2005**	**Y2006**	**Sh%**	**Y06/05**	**TV**	**NP**	**MG**	**RD**	**OD**	**CN**
Government/Organization Advertising	GOA	39	42	76	15	81	8	87	2	*	3	0
Shopping Malls & Retail Stores	SMR	51	61	57	12	-7	3	79	14	1	3	0
Financial Services	FS	21	37	47	10	28	13	72	5	*	10	0
Professional Services	PRS	44	45	47	9	4	1	92	6	*	1	0
Vehicles,Accessories & Supply	VAS	38	41	40	8	-3	2	82	11	1	3	0
Hotel, Travel & Tourism	HTT	37	39	37	8	-5	14	55	8	3	21	0
Publishig Media	PUM	27	30	34	7	13	14	70	10	3	4	0
Toiletries Hygiene/ House Care Products	THP	15	23	27	5	20	42	19	32	*	7	0
Other Services	SER	16	22	25	5	16	1	94	4	*	1	0
Communications & Public Utilities	CPU	19	18	25	5	34	45	36	7	*	11	0
Insurance & Real Estate	INR	12	18	21	4	22	9	87	3	*	*	0
Clothing,Jewellery & Personal Acs	CJP	13	17	14	3	-13	8	42	49	*	2	0
Entertainment	ENT	13	13	13	3	-2	9	78	7	3	3	0
Business/Construct Equip. & Supply	BCS	15	13	12	2	-7	4	80	14	0	2	0
Food Beverages And Tobacco	FBT	14	13	12	2	-9	33	28	14	1	24	0
Household Appliances	HHA	8	8	8	2	2	24	62	11	0	3	0
Total		**382**	**438**	**494**	**100**	**13**	**7**	**71**	**13**	**2**	**8**	**0**


Y2006 Media Split %


Annual Growth Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

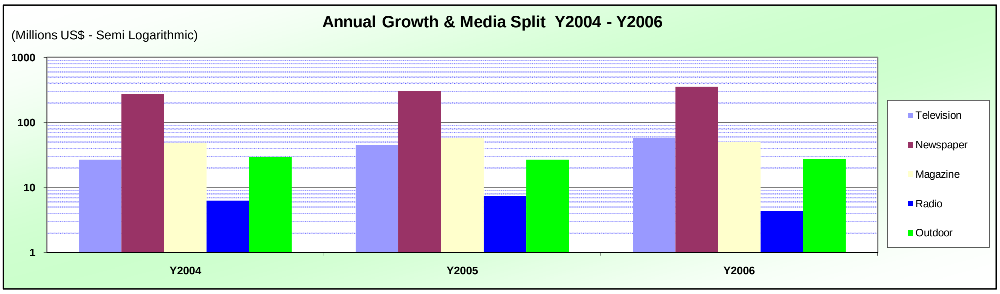
Monthly Spend Analysis (Millions US$)Y2004 - 2006


(Millions US$)

				Var'n %
Period	**Y2004**	**Y2005**	**Y2006**	**Y06/05**
Jan	28	31	38	22
Feb	25	29	37	27
Mar	30	36	38	6
Apr	31	38	38	2
May	34	38	42	8
Jun	35	38	51	35
Jul	29	30	36	18
Aug	26	29	32	12
Sep	32	36	47	31
Oct	41	54	53	-1
Nov	37	38	41	9
Dec	35	42	41	-2
Total	**382**	**438**	**494**	**13**

Overall Media Split Analysis (Millions US$)

Media	**Y2004**		**Y2005**		**Y2006**		**Var'n %**	**Growth Index***	
	Value	**Sh%**	**Value**	**Sh%**	**Value**	**Sh%**	**Y2005/2006**	**Y06**	**Y05**
Television	27	7	44	10	58	12	30	216	166
Newspaper	271	71	302	69	355	72	18	131	111
Magazine	49	13	58	13	50	10	-14	102	119
Radio	6	2	7	2	4	1	-42	69	119
Outdoor	29	8	27	6	27	6	3	94	91
Total	**382**	**100**	**438**	**100**	**494**	**100**	**13**	**129**	**115**


Annual Growth & Media Split Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

Top Brands Y2006 (000 US$)

Television Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Mtc-vodafone	2821	E
2	Silvikrin	1719	E
3	Little Caesar	1559	-37
4	Martele	1524	-44
5	Mcdonald`s	1438	228
6	Popeyes	1148	-15
7	Nat`l Assemb.`06	1052	N
8	Tri Power	885	-56
9	Lux	843	N
10	Wataniya Telecom	840	-64
11	Kamco Asset M.	823	-39
12	Mirinda	780	N

Newspapers Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Nat`l Assemb.`06	7825	N
2	N.b.k.	4344	44
3	B.k.m.e.	4127	110
4	Demise	3627	1
5	Wataniya Telecom	3546	19
6	Toyota	3434	-4
7	Gulf Bank	3401	32
8	Kuwait Finan. House	3017	21
9	Al Ahli B.of Kwt	2242	81
10	Chevrolet	2136	11
11	Ifa	2097	160
12	Mtc-vodafone	2084	-25

Magazines Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Wataniya Telecom	859	17
2	Virgin	712	91
3	Orbit	510	E
4	Audemars Piguet	475	31
5	Toyota	448	-10
6	N.b.k.	427	2
7	Givenchy	418	283
8	Midas	396	84
9	Mtc-vodafone	371	-35
10	Gulf Bank	366	220
11	Nafaes	342	53
12	Subaru	332	E

Radio Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Little Caesar	400	-13
2	Popeyes	307	26
3	Dunlop	148	72
4	Mitsubishi	140	-16
5	Audi	111	N
6	N.b.k.	102	63
7	Ole	97	N
8	Mtc-vodafone	72	-27
9	Centrepoint	69	-6
10	H_m	55	N
11	Al Alali	46	85
12	Al Mulla	42	7

Outdoor Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Burger King	1717	-1
2	Kentucky	1451	-20
3	Mtc-vodafone	1358	-2
4	Mcdonald`s	1136	92
5	Hardees	1123	2
6	Pizza Hut	1029	2
7	Wataniya Telecom	1024	-1
8	N.b.k.	958	23
9	Gulf Bank	835	101
10	Burgan Bank	791	E
11	Kuwait Finan. House	717	188
12	C.b.k.	437	244

E - Exceeding the limit >300%   N - New

KUWAIT - Y2006

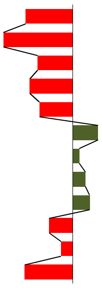
ADVERTISING SPACE ALLOCATION AND POSITIONING

Millions US$ 494 ▲ + 13%

Thousand SESU 213 ▼ - 11%

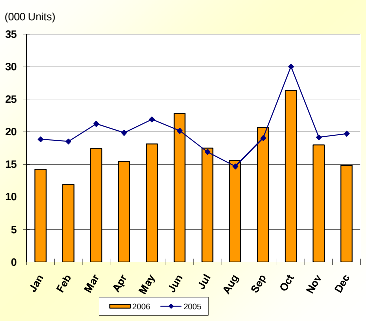
TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2006/2005Var %



Period	ALL MEDIA (SESU Units)* 2006	ALL MEDIA 2005	ALL MEDIA % Var'n	NEWSPAPERS (Pages) 2006	NEWSPAPERS % Var'n	MAGAZINES (Pages) 2006	MAGAZINES % Var'n	TELEVISION (Min) 2006	TELEVISION % Var'n
January	14265	18863	-24	8230	48	1065	-21	2496	-47
February	11896	18543	-36	7198	32	1179	-7	2767	-20
March	17397	21258	-18	7173	8	1249	-14	4608	21
April	15453	19872	-22	7632	8	1290	-45	3000	-15
May	18146	21914	-17	8425	19	1403	-24	3220	-19
June	22799	20179	13	9419	37	1347	-23	7309	77
July	17490	16948	3	7308	23	988	-31	5539	47
August	15648	14719	6	6428	14	847	-25	4929	35
September	20694	19057	9	8652	34	1149	3	7644	14
October	26342	30010	-12	7211	-2	1303	-23	14455	3
November	18003	19182	-6	7930	30	1255	-13	5188	-20
December	14826	19735	-25	9214	26	1276	-29	655	-89
	212959	**240280**	**-11**	**94820**	**22**	**14351**	**-23**	**61811**	**-4**

Ad Space & Seasonality



Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

NEWSPAPERS

Spend by Position (Millions US $)	2006 Value	2006 %	2005 Value	2005 %	Var'n %
Cover	50	14	47	16	6
Page 2/3	14	4	11	4	25
Inside	278	78	233	77	19
Supplement	13	4	11	4	20
	355	**100**	**302**	**100**	**18**

Spend by Position

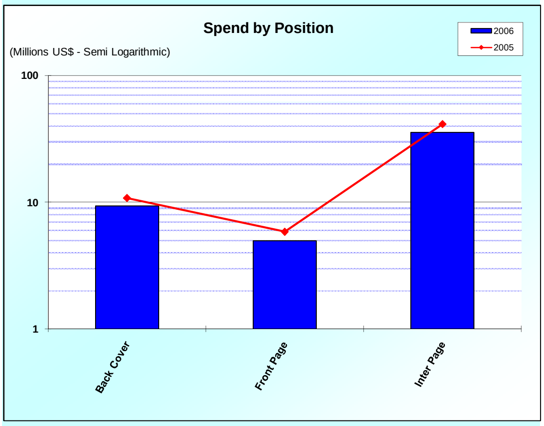
(Millions US$ - Semi Logarithmic)

MAGAZINES

Spend by Position (Millions US $)	2006 Value	2006 %	2005 Value	2005 %	Var'n %
Back Cover	9	19	11	19	-13
Front Page	5	10	6	10	-15
Inter Page	36	71	41	71	-14
	50	**100**	**58**	**100**	**-14**

Spend by Position

(Millions US$ - Semi Logarithmic)

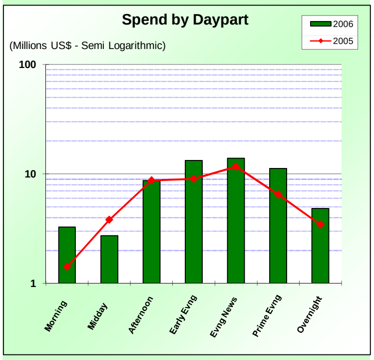


TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2006 Value	2006 %	2005 Value	2005 %	Var'n %
Morning	3	6	1	3	130
Midday	3	5	4	9	-29
Afternoon	9	15	9	20	0
Early Evng	13	23	9	20	48
Evng News	14	24	12	26	20
Prime Evng	11	19	6	15	72
Overnight	5	8	3	8	40
	58	**100**	**44**	**100**	**30**

Spend by Daypart

(Millions US$ - Semi Logarithmic)



TOP 30 LEAGUE OF Y2006 (000 US$)

Rank & Brand	JANUARY - DECEMBER		2 YEAR		MEDIA SPLIT % - JAN - DEC 2006			
	2006	2005	TOTAL	AVG	TV	NP	MG	OT*
1 Nat`l Assemb.`06	7,825	0	7,825	3,913	0.00	100.00	0.00	0.00
2 Mtc-vodafone	6,706	5,495	12,201	6,100	42.07	31.07	5.53	21.33
3 Wataniya Telecom	6,270	7,125	13,395	6,697	13.40	56.56	13.70	16.33
4 N.b.k.	6,254	4,725	10,979	5,490	6.77	69.46	6.82	16.95
5 Gulf Bank	5,319	3,103	8,422	4,211	13.49	63.94	6.88	15.70
6 B.k.m.e.	4,545	2,243	6,788	3,394	1.46	90.81	1.11	6.63
7 Toyota	4,007	4,115	8,122	4,061	2.09	85.69	11.18	1.04
8 Kuwait Finan. House	3,956	2,932	6,888	3,444	3.57	76.27	2.04	18.11
9 Demise	3,627	3,579	7,206	3,603	0.00	100.01	0.00	0.00
10 Kentucky	3,045	4,873	7,918	3,959	15.26	36.20	0.50	48.04
11 Mcdonald`s	2,943	1,592	4,535	2,268	48.88	3.98	8.56	38.58
12 C.b.k.	2,671	1,552	4,223	2,112	5.55	65.27	12.04	17.15
13 Al Ahli B.of Kwt	2,668	1,858	4,526	2,263	13.51	84.03	1.85	0.63
14 Mitsubishi	2,601	2,628	5,229	2,615	0.00	70.56	12.53	16.92
15 Hardees	2,383	2,545	4,928	2,464	9.66	41.60	0.57	48.19
16 Ford	2,294	3,057	5,351	2,676	11.13	78.37	0.67	9.85
17 Burger King	2,283	2,733	5,016	2,508	0.47	24.00	0.31	75.22
18 Chevrolet	2,281	2,057	4,338	2,169	0.00	93.66	4.88	1.45
19 Nissan	2,193	2,497	4,690	2,345	0.00	71.43	8.28	20.29
20 Burgan Bank	2,188	1,685	3,873	1,937	0.00	50.45	13.42	36.13
21 Little Caesar	2,157	3,414	5,571	2,786	72.27	7.38	1.18	19.18
22 Ifa	2,118	813	2,931	1,466	0.00	99.00	0.33	0.67
23 Taiba Clinic	2,070	1,173	3,243	1,622	0.00	95.78	4.24	0.00
24 Ikea	1,842	1,195	3,037	1,519	0.00	78.63	12.13	9.25
25 Panasonic	1,838	2,488	4,326	2,163	0.00	96.93	3.07	0.00
26 Silvikrin	1,802	285	2,087	1,043	95.37	2.00	0.00	2.63
27 Lexus	1,748	1,844	3,592	1,796	2.06	86.01	11.91	0.00
28 Popeyes	1,566	1,838	3,404	1,702	73.29	5.13	1.97	19.61
29 Pizza Hut	1,557	1,702	3,259	1,630	0.68	32.21	0.38	66.74
30 Martele	1,524	2,703	4,227	2,114	100.03	0.00	0.00	0.00

*OT=Radio+OutDoor+Cinema

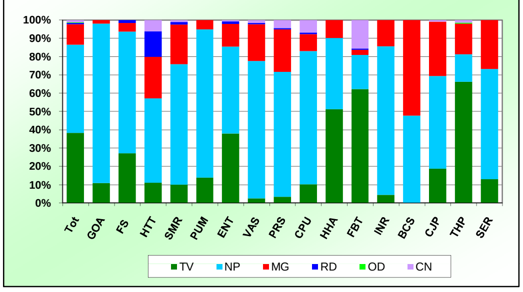
BAHRAIN - Y2006

Millions US$ 107 ▲ + 3%

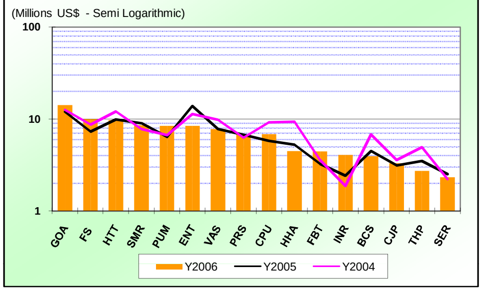
Advertising Expenditure for Chapters (Millions US$) Y2004 - 2006(Jan - Dec)

Chapter	Abbreviation	Y2004	Y2005	Y2006	Sh%	%Var'n Y06/05	Media Split % TV	NP	MG	RD	OD	CN
Government/Organization Advertising	GOA	13	12	14	13	19	11	87	2	*	0	*
Financial Services	FS	9	7	10	9	37	27	67	5	2	*	0
Hotel, Travel & Tourism	HTT	12	10	10	9	-1	11	46	23	14	0	6
Shopping Malls & Retail Stores	SMR	8	9	9	8	-5	10	66	22	2	*	1
Publishig Media	PUM	7	6	8	8	32	14	81	5	*	*	0
Entertainment	ENT	11	14	8	8	-39	38	48	12	1	*	1
Vehicles,Accessories & Supply	VAS	10	8	8	7	0	3	75	20	1	*	2
Professional Services	PRS	6	7	7	6	2	3	68	23	1	*	4
Communications & Public Utilities	CPU	9	6	7	6	19	10	73	9	1	*	7
Household Appliances	HHA	9	5	5	4	-15	51	39	10	0	0	0
Food Beverages And Tobacco	FBT	4	3	4	4	37	62	19	3	1	*	16
Insurance & Real Estate	INR	2	2	4	4	67	4	81	14	0	0	0
Business/Construct Equip. & Supply	BCS	7	5	4	4	-12	0	48	52	0	0	*
Clothing,Jewellery & Personal Acs	CJP	4	3	3	3	6	19	51	30	*	0	1
Toiletries Hygiene/ House Care Products	THP	5	4	3	3	-22	66	15	17	*	1	1
Other Services	SER	2	3	2	2	-8	13	60	27	0	0	0
Total		**116**	**103**	**107**	**100**	**3**	**38**	**48**	**11**	**1**	**0**	**1**

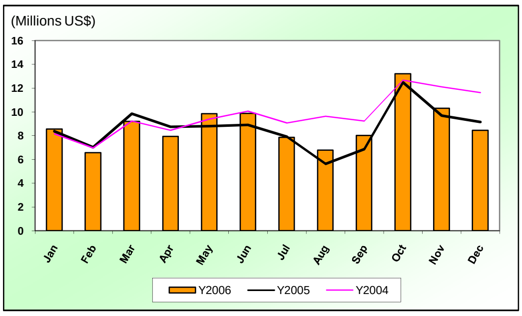
Y2006 Media Split %



Annual Growth Y2004 - Y2006



Monthly Spend Analysis (Millions US$)Y2004 - 2006

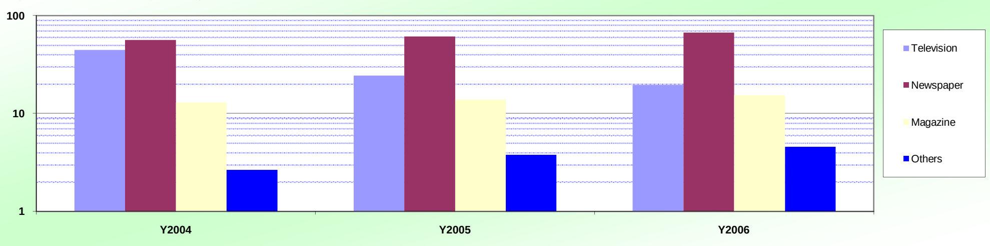


Period	Y2004	Y2005	Y2006	Var'n % Y06/05
Jan	8	8	9	2
Feb	7	7	7	-7
Mar	9	10	9	-7
Apr	8	9	8	-9
May	9	9	10	12
Jun	10	9	10	11
Jul	9	8	8	-1
Aug	10	6	7	20
Sep	9	7	8	17
Oct	13	12	13	6
Nov	12	10	10	6
Dec	12	9	8	-8
Total	**116**	**103**	**107**	**3**

Overall Media Split Analysis (Millions US$)

Media	Y2004		Y2005		Y2006		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2005/2006	Y06	Y05
Television	45	38	24	24	20	18	-20	44	55
Newspaper	56	48	61	59	67	63	9	119	109
Magazine	13	11	14	13	15	14	11	119	107
Others	3	2	4	4	5	4	20	171	143
Total	**116**	**100**	**103**	**100**	**107**	**100**	**3**	**91**	**89**

Annual Growth & Media Split Y2004 - Y2006



Top Brands Y2006 (000 US$)

Television Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Bah.int`l Circuit	1228	N
2	Kuwait Finan. House	1078	E
3	Pepsi	755	147
4	Emjoi	713	-46
5	Revart	587	E
6	Jet Aire	565	N
7	Durrat Albahrain	556	149
8	Mirinda	530	E
9	Mtc-vodafone	522	E
10	Al Waqt	493	N
11	Magic Mirror	477	81
12	Shamil Bank	471	N

Newspapers Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Batelco	1714	15
2	Mtc-vodafone	1238	-25
3	North Star Communication	954	E
4	Gulf Bid	849	N
5	Ahli United Bank	830	49
6	Hertz	768	97
7	Riffa Views	720	E
8	Bah.int`l Circuit	626	N
9	Chevrolet	597	-4
10	Bank Of Bah _kwt	570	-6
11	Entrada	541	31
12	Gulf Air	528	-1

Magazines Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Batelco	170	47
2	Bah.int`l Circuit	162	N
3	B.m.w.	149	98
4	Prodesign Arabia	128	N
5	Mtc-vodafone	120	136
6	Zamil Steel	115	-4
7	Hertz	111	-24
8	Gulf Bid	109	E
9	Crowne Plaza	108	269
10	Qanbar Dywidag	101	-6
11	Bah.special.hospital	98	2
12	Mitsubishi	93	5

Radio Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	British Airways	1018	E
2	Bah.int`l Circuit	57	N
3	Diplomat Radis.s	48	E
4	Ahli United Bank	45	N
5	Nat`l B.bahrain	43	-33
6	Bj`s	41	E
7	Chilis	40	182
8	Batelco	37	E
9	Gulf Hotel	36	-34
10	Ama Int`l Univ.	32	189
11	Riffa Golf Club	31	132
12	Visa	27	E

Outdoor Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Batelco	9	-75
2	Jawad Group	8	E
3	Mango	6	133
4	Ford	6	-30
5	Pepsi	5	20
6	Bah.int`l Circuit	5	N
7	Ama	5	200
8	Nissan	3	-83
9	Bahrain Saudi Bank	3	100
10	Mont Blanc	3	298
11	Toyota	3	100
12	Bank Muscat	3	76

E - Exceeding the limit >300% N - New

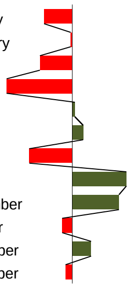
BAHRAIN - Y2006

ADVERTISING SPACE ALLOCATION AND POSITIONING

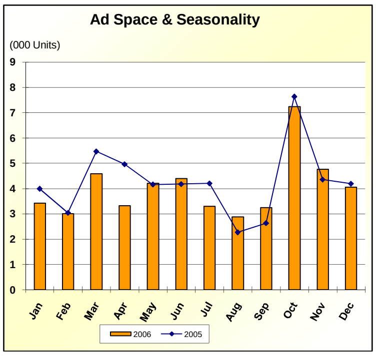
Millions US$ 107 ▲ + 3%

Thousand SESU 48 ▼ - 5%

TOTAL MARKET ADVERTISING SPACE ALLOCATION



Period	ALL MEDIA (SESU Units)* 2006	2005	% Var'n	NEWSPAPERS (Pages) 2006	% Var'n	MAGAZINES (Pages) 2006	% Var'n	TELEVISION (Min) 2006	% Var'n
January	3430	3993	-14	1963	44	338	-10	718	-64
February	3012	3039	-1	1002	-12	401	2	1088	-14
March	4586	5471	-16	1545	14	510	19	1768	-43
April	3327	4964	-33	1436	22	404	-6	720	-76
May	4207	4159	1	1670	22	567	34	1284	-39
June	4404	4177	5	1746	30	426	2	1616	-21
July	3301	4207	-22	1410	20	400	15	792	-66
August	2887	2273	27	1126	13	420	28	648	19
September	3242	2630	23	1186	7	568	45	853	14
October	7244	7635	-5	1562	19	634	43	4425	-14
November	4767	4358	9	1659	15	619	5	1803	-2
December	4052	4194	-3	1705	6	800	45	1345	-6
	48457	**51099**	**-5**	**18010**	**17**	**6088**	**19**	**17060**	**-33**

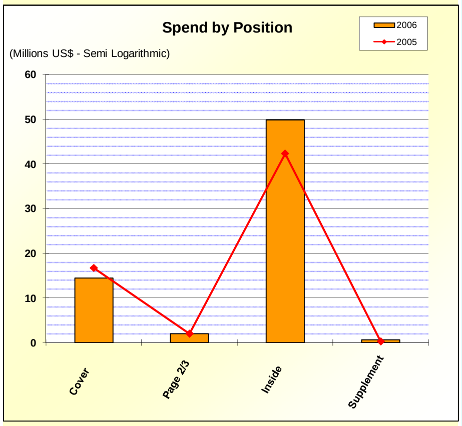


Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

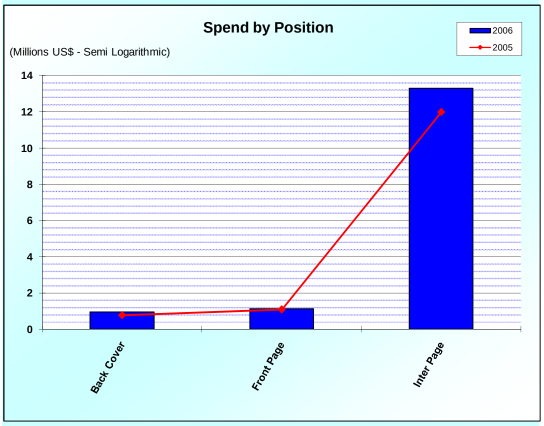
NEWSPAPERS

Spend by Position (Millions US $)	2006 Value	%	2005 Value	%	Var'n %
Cover	14	22	17	27	-13
Page 2/3	2	3	2	3	0
Inside	50	74	42	69	18
Supplement	1	1	0	0	125
	67	**100**	**61**	**100**	**9**



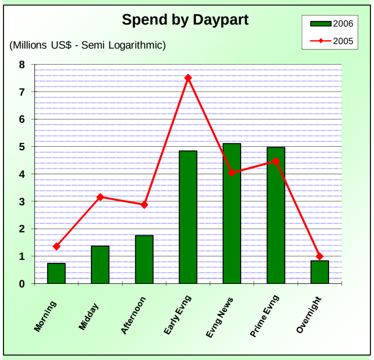
MAGAZINES

Spend by Position (Millions US $)	2006 Value	%	2005 Value	%	Var'n %
Back Cover	1	6	1	6	25
Front Page	1	7	1	8	5
Inter Page	13	86	12	87	11
	15	**100**	**14**	**100**	**11**



TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2006 Value	%	2005 Value	%	Var'n %
Morning	1	4	1	6	-46
Midday	1	7	3	13	-57
Afternoon	2	9	3	12	-39
Early Evng	5	25	8	31	-35
Evng News	5	26	4	17	26
Prime Evng	5	25	4	18	11
Overnight	1	4	1	4	-17
	20	**100**	**24**	**100**	**-20**



TOP 30 LEAGUE OF Y2006 (000 US$)

Rank & Brand	JANUARY - DECEMBER 2006	2005	2 YEAR TOTAL	AVG	MEDIA SPLIT % - JAN - DEC 2006 TV	NP	MG	OT*
1 Bah.int`l Circuit	2,101	0	2,101	1,050	58.46	29.81	7.73	3.98
2 Batelco	2,056	1,897	3,953	1,977	5.64	83.37	8.29	2.73
3 Mtc-vodafone	1,942	1,721	3,663	1,831	26.86	63.75	6.19	3.18
4 Kuwait Finan. House	1,278	422	1,700	850	84.36	15.10	0.51	0.00
5 Pepsi	1,197	433	1,630	815	63.04	15.56	0.19	21.21
6 British Airways	1,065	220	1,285	643	0.00	4.46	0.00	95.59
7 North Star Communication	965	232	1,197	599	0.00	98.91	0.22	0.92
8 Gulf Bid	958	11	969	485	0.00	88.60	11.41	0.00
9 Ahli United Bank	886	587	1,473	737	0.00	93.69	1.05	5.29
10 Hertz	878	536	1,414	707	0.00	87.42	12.62	0.00
11 Riffa Views	796	156	952	476	0.00	90.46	9.55	0.00
12 Gulf Air	729	626	1,355	678	17.94	72.42	8.17	1.53
13 Emjoi	713	1,332	2,045	1,023	100.05	0.00	0.00	0.00
14 Bank Muscat Int.	667	386	1,053	527	14.13	78.80	5.91	1.20
15 Shamil Bank	664	121	785	392	70.98	28.88	0.00	0.12
16 Chevrolet	658	741	1,399	700	0.00	90.78	1.03	8.23
17 Bank Of Bah _kwt	628	934	1,562	781	0.00	90.82	9.25	0.00
18 Durrat Albahrain	624	756	1,380	690	89.14	10.14	0.64	0.00
19 Mirinda	592	163	755	377	89.55	9.93	0.38	0.07
20 Revart	587	30	617	309	100.05	0.00	0.00	0.00
21 Entrada	568	436	1,004	502	0.00	95.33	4.74	0.00
22 Jet Aire	565	0	565	283	100.02	0.00	0.00	0.00
23 Ithmaar Bank	563	4	567	284	53.17	45.47	1.42	0.00
24 Tra	549	1,064	1,613	806	10.99	20.90	0.85	67.19
25 Doha Asian Games	534	6	540	270	32.56	64.67	0.00	2.79
26 Al Waqt	519	0	519	259	95.05	4.58	0.00	0.31
27 Directorate E._r	513	0	513	257	40.42	59.61	0.00	0.00
28 Magic Mirror	477	263	740	370	100.03	0.00	0.00	0.00
29 Sharp	468	330	798	399	0.00	99.96	0.00	0.00
30 Conair	464	1,140	1,604	802	99.92	0.00	0.00	0.00

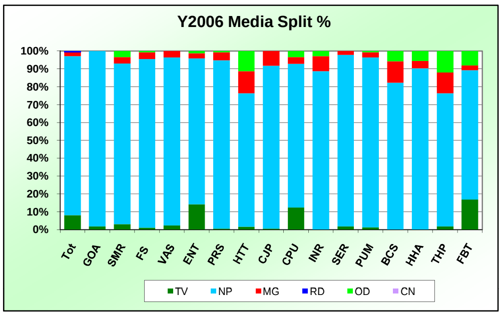
*OT=Radio+OutDoor+Cinema

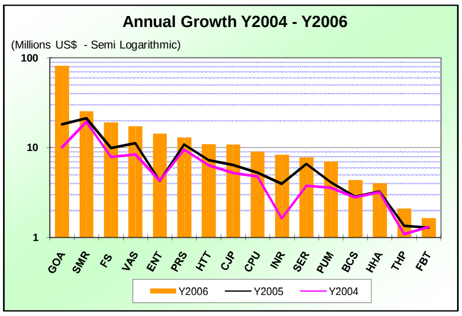
QATAR - Y2006

Millions US$ 237 ▲ + 101%

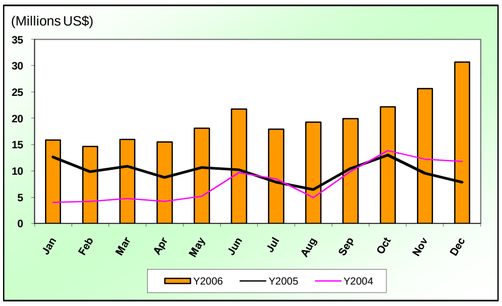
Advertising Expenditure for Chapters (Millions US$) Y2004 - 2006(Jan - Dec)

Chapter	Abbreviation	Y2004	Y2005	Y2006	Sh%	%Var'n Y06/05	Media Split % TV	NP	MG	RD	OD	CN
Government/Organization Advertising	GOA	10	18	82	34	349	2	98	*	0	*	0
Shopping Malls & Retail Stores	SMR	19	21	26	11	20	3	90	4	0	3	0
Financial Services	FS	8	10	19	8	93	1	95	4	0	1	0
Vehicles,Accessories & Supply	VAS	8	11	17	7	54	2	94	4	0	*	0
Entertainment	ENT	4	4	14	6	236	14	82	3	*	1	0
Professional Services	PRS	10	11	13	5	20	1	94	4	*	1	0
Hotel, Travel & Tourism	HTT	6	7	11	5	50	2	75	12	0	11	0
Clothing,Jewellery & Personal Acs	CJP	5	6	11	5	68	1	91	8	0	*	0
Communications & Public Utilities	CPU	5	5	9	4	72	12	81	4	0	3	0
Insurance & Real Estate	INR	2	4	8	4	111	*	88	9	0	3	0
Other Services	SER	4	7	8	3	19	2	96	2	0	*	0
Publishig Media	PUM	4	4	7	3	71	1	95	3	*	1	0
Business/Construct Equip. & Supply	BCS	3	3	4	2	52	0	82	12	0	6	0
Household Appliances	HHA	3	3	4	2	23	0	90	4	0	6	0
Toiletries Hygiene/ House Care Products	THP	1	1	2	1	56	2	74	12	*	12	0
Food Beverages And Tobacco	FBT	1	1	2	1	28	17	72	3	*	8	0
Total		**93**	**118**	**237**	**100**	**101**	**8**	**89**	**2**	**1**	**0**	**0**





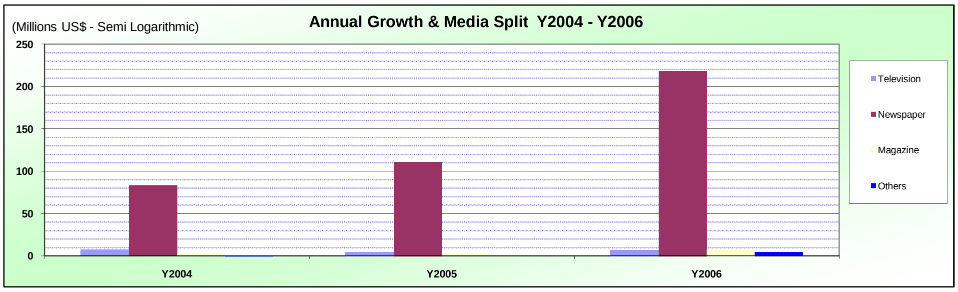
Monthly Spend Analysis (Millions US$)Y2004 - 2006



Period	Y2004	Y2005	Y2006	Var'n % Y06/05
Jan	4	13	16	25
Feb	4	10	15	49
Mar	5	11	16	47
Apr	4	9	15	77
May	5	11	18	70
Jun	10	10	22	113
Jul	8	8	18	128
Aug	5	6	19	199
Sep	10	10	20	91
Oct	14	13	22	70
Nov	12	10	26	168
Dec	12	8	31	289
Total	**93**	**118**	**237**	**101**

Overall Media Split Analysis (Millions US$)

Media	Y2004		Y2005		Y2006		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2005/2006	Y06	Y05
Television	7	8	5	4	7	3	44	93	65
Newspaper	83	89	111	94	218	92	96	262	134
Magazine	2	2	2	2	8	3	306	425	105
Others	1	1	0	0	4	2	1310	682	48
Total	**93**	**100**	**118**	**100**	**237**	**100**	**101**	**255**	**127**



Top Brands Y2006 (000 US$)

Television Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Doha Asian Games	1554	N
2	Q-tel	737	91
3	Ali Bin Ali	322	53
4	Nat`l Human Rsrc	262	10
5	Red Crescent Soc	258	E
6	B.m.w.	228	N
7	Mtc-vodafone	184	E
8	Al Majed	181	52
9	Qatar Nat`l Bank	177	56
10	Qatar Resort Area	169	-10
11	Qatar Gas	169	N
12	Qatar Orphan Fo.	169	21
13	Nat`l Counc.c.h.	146	N
14	Intelligen.qatar	126	N
15	Qatar Red Cresc.	124	147

Newspapers Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Doha Asian Games	7280	E
2	Q-tel	4951	192
3	Qatar Nat`l Bank	4623	280
4	Doha Bank	3001	68
5	Comm.b.of Qatar	1773	63
6	Al Emadi Hospital	1657	N
7	Nissan	1314	116
8	Al Ahli B.qatar	1134	56
9	Panasonic	1008	114
10	Qatar Foundation	938	134
11	Kia	926	9
12	Qatari Diar	880	209
13	Toyota	868	177
14	Lulu Hyper Market	844	N
15	Qatar Airways	839	-18

Magazines Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Qatar Airways	193	146
2	Nokia	175	N
3	Q-tel	166	E
4	Qatari Diar	151	N
5	Doha Asian Games	114	N
6	Bvlgari	87	E
7	Lg	81	E
8	Emirates Airline	77	N
9	Damas	75	10
10	Consultant Den.c	72	118
11	Coffee Beanery	69	N
12	Panasonic	69	E
13	Sterling	68	E
14	Aspire	66	103
15	Hsbc	60	E

Radio Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Doha Asian Games	24	N
2	Supreme Edu.col.	6	N
3	Red Bull	5	N
4	Doha Cultural F.	4	N
5	Qatar Nat`l Bank	3	N
6	Damac	3	N
7	North A.qatar C.	3	N
8	Al Massa Art Pr.	3	N
9	Ltc	3	N
10	Visa	2	N
11	Qatar Tour.auth.	2	N
12	Debenhams	1	-77
13	Lufthansa	1	N
14	The Land	1	N
15	M.h. Al Shaya	1	-53

E - Exceeding the limit >300%   N - New

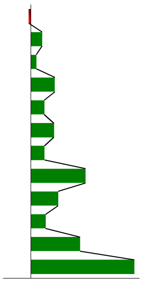
QATAR - Y2006

Millions US$ 237 ▲ + 101%
Thousand SESU 76 ▲ + 46%

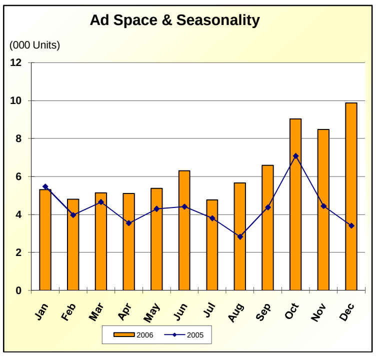
ADVERTISING SPACE ALLOCATION AND POSITIONING

TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2006/2005Var %



Period	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
	2006	2005	% Var'n	2006	% Var'n	2006	% Var'n	2006	% Var'n
January	5302	5478	-3	4266	-4	161	16	804	10
February	4803	3971	21	4117	17	172	-14	452	165
March	5142	4654	10	4424	9	178	39	462	28
April	5111	3540	44	4093	30	90	-27	812	814
May	5378	4299	25	4222	5	539	360	494	760
June	6309	4417	43	5282	39	469	205	469	62
July	4775	3808	25	4185	47	402	183	126	-70
August	5668	2826	101	4840	98	267	310	473	114
September	6592	4380	50	4940	26	285	200	1280	355
October	9034	7089	27	4793	24	501	111	3638	22
November	8475	4444	91	6556	90	275	96	1644	93
December	9880	3405	190	8342	199	279	128	1156	134
	76469	**52312**	**46**	**60058**	**42**	**3616**	**118**	**11810**	**70**



Ad Space & Seasonality

Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

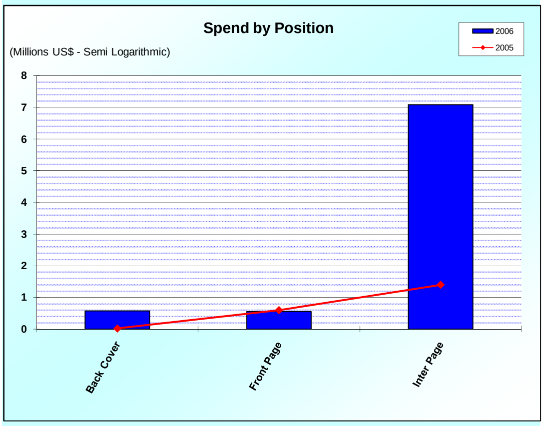
NEWSPAPERS

Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Cover	39	18	28	25	40
Inside	173	79	81	73	113
Supplement	6	3	2	1	309
	218	**100**	**111**	**100**	**96**

Spend by Position

MAGAZINES

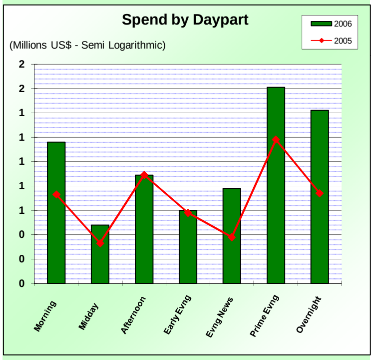
Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Back Cover	1	7	0	1	2750
Front Page	1	7	1	30	-8
Inter Page	7	86	1	69	406
	8	**100**	**2**	**100**	**306**



Spend by Position

TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Morning	1	17	1	15	59
Midday	0	7	0	7	45
Afternoon	1	13	1	18	0
Early Evng	1	9	1	12	3
Evng News	1	11	0	8	105
Prime Evng	2	23	1	24	36
Overnight	1	20	1	15	92
	7	**100**	**5**	**100**	**44**



Spend by Daypart

TOP 30 LEAGUE OF Y2006 (000 US$)

Rank & Brand	JANUARY - DECEMBER		2 YEAR		MEDIA SPLIT % - JAN - DEC 2006			
	2006	2005	TOTAL	AVG	TV	NP	MG	OT*
1 Doha Asian Games	9,104	1	9,105	4,552	17.07	79.96	1.25	1.71
2 Q-tel	6,132	2,129	8,261	4,131	12.02	80.74	2.71	4.54
3 Qatar Nat`l Bank	4,904	1,328	6,232	3,116	3.61	94.26	0.54	1.58
4 Doha Bank	3,045	2,012	5,057	2,528	0.00	98.57	1.42	0.00
5 Comm.b.of Qatar	1,812	1,100	2,912	1,456	0.00	97.83	2.09	0.07
6 Al Emadi Hospital	1,662	0	1,662	831	0.00	99.70	0.29	0.00
7 Nissan	1,391	619	2,010	1,005	0.00	94.47	4.28	1.22
8 Lg	1,190	516	1,706	853	0.00	66.12	6.84	27.09
9 Al Ahli B.qatar	1,159	766	1,925	963	0.00	97.87	1.40	0.73
10 Panasonic	1,077	474	1,551	775	0.00	93.57	6.42	0.00
11 Kentucky	1,073	153	1,226	613	0.00	67.21	1.19	31.58
12 Qatar Airways	1,037	1,123	2,160	1,080	0.51	80.90	18.59	0.00
13 Qatari Diar	1,031	285	1,316	658	0.00	85.36	14.68	0.00
14 Mcdonald`s	1,008	299	1,307	653	0.76	34.97	2.75	61.50
15 Lulu Hyper Market	995	0	995	498	0.00	84.81	1.10	14.12
16 Dasman Centre	974	118	1,092	546	0.00	66.04	0.00	33.94
17 Kia	967	864	1,831	916	0.00	95.72	4.31	0.00
18 Qatar Foundation	941	463	1,404	702	0.00	99.64	0.35	0.00
19 Toyota	876	313	1,189	594	0.00	99.10	0.88	0.00
20 North A.qatar C.	866	858	1,724	862	8.43	87.20	4.02	0.32
21 B.m.w.	844	463	1,307	653	26.98	69.91	3.05	0.00
22 Hsbc	815	608	1,423	712	0.00	92.61	7.41	0.00
23 Lulu Center	813	759	1,572	786	0.00	94.11	5.85	0.00
24 Mitsubishi	795	660	1,455	727	0.00	95.41	3.53	1.04
25 Carrefour	784	421	1,205	602	0.00	99.98	0.00	0.00
26 Samsung	756	396	1,152	576	0.70	97.39	1.85	0.00
27 Mercedes	735	141	876	438	0.00	94.72	5.30	0.00
28 Modern Home	727	327	1,054	527	0.00	87.91	2.99	9.09
29 Qatar Gas	717	106	823	412	23.63	71.67	0.00	4.73
30 Honda	704	455	1,159	580	0.00	99.69	0.33	0.00

*OT=Radio+OutDoor+Cinema

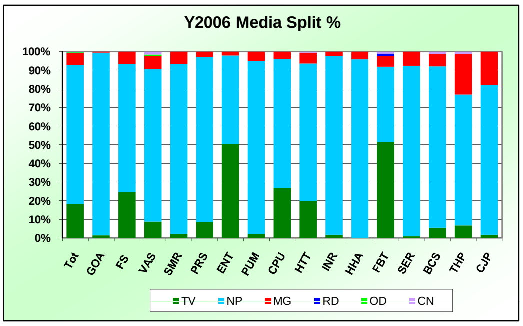
OMAN - Y2006

Millions US$ 139 ▲ + 32%

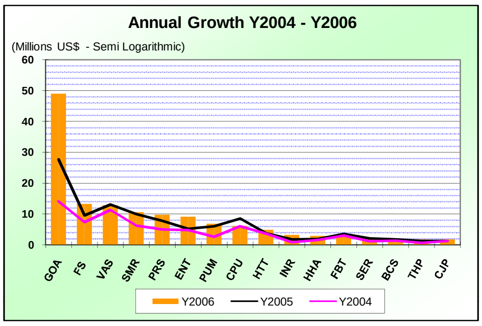
Advertising Expenditure for Chapters (Millions US$) Y2004 - 2006(Jan - Dec)

						%Var'n	Media Split %					
Chapter	**Abbreviation**	**Y2004**	**Y2005**	**Y2006**	**Sh%**	**Y06/05**	**TV**	**NP**	**MG**	**RD**	**OD**	**CN**
Government/Organization Advertising	GOA	14	28	49	35	77	1	98	1	0	0	0
Financial Services	FS	7	10	13	10	38	25	68	7	0	*	*
Vehicles,Accessories & Supply	VAS	11	13	13	9	-1	9	82	7	*	1	2
Shopping Malls & Retail Stores	SMR	6	10	11	8	6	2	91	7	0	0	0
Professional Services	PRS	5	8	10	7	25	9	89	3	0	0	0
Entertainment	ENT	5	5	9	7	78	50	48	2	0	0	0
Publishig Media	PUM	3	6	7	5	15	2	93	5	0	0	0
Communications & Public Utilities	CPU	6	8	6	4	-28	27	69	4	*	*	*
Hotel, Travel & Tourism	HTT	4	4	5	4	31	20	74	6	0	0	1
Insurance & Real Estate	INR	1	2	3	2	81	2	96	2	0	*	0
Household Appliances	HHA	2	2	3	2	58	0	96	4	0	0	0
Food Beverages And Tobacco	FBT	3	4	3	2	-26	51	40	6	1	*	1
Other Services	SER	1	2	2	2	11	1	92	8	0	0	0
Business/Construct Equip. & Supply	BCS	1	2	2	1	19	6	86	7	0	*	1
Toiletries Hygiene/ House Care Products	THP	1	1	2	1	46	7	70	22	0	0	1
Clothing,Jewellery & Personal Acs	CJP	1	1	2	1	46	2	80	18	0	0	0
Total		**72**	**105**	**139**	**100**	**32**	**18**	**75**	**6**	**0**	**0**	**0**

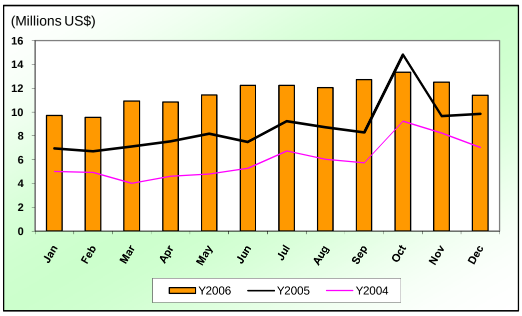
Y2006 Media Split %



Annual Growth Y2004 - Y2006



Monthly Spend Analysis (Millions US$)Y2004 - 2006

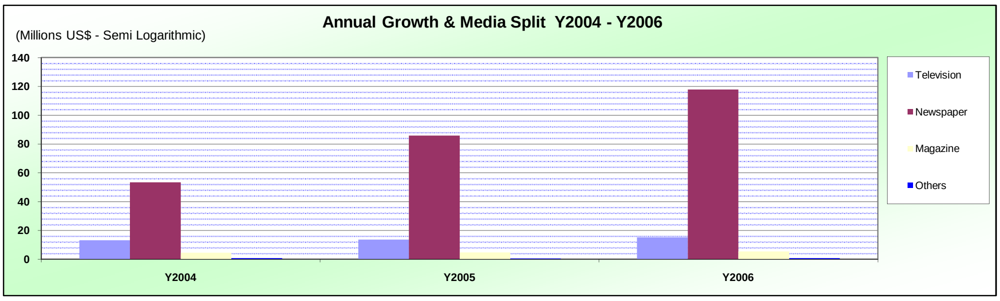


				Var'n %
Period	**Y2004**	**Y2005**	**Y2006**	**Y06/05**
Jan	5	7	10	40
Feb	5	7	10	42
Mar	4	7	11	54
Apr	5	8	11	44
May	5	8	11	40
Jun	5	7	12	63
Jul	7	9	12	32
Aug	6	9	12	38
Sep	6	8	13	53
Oct	9	15	13	-10
Nov	8	10	13	29
Dec	7	10	11	16
Total	**72**	**105**	**139**	**32**

Overall Media Split Analysis (Millions US$)

Media	**Y2004**		**Y2005**		**Y2006**		**Var'n %**	**Growth Index***	
	Value	**Sh%**	**Value**	**Sh%**	**Value**	**Sh%**	**Y2005/2006**	**Y06**	**Y05**
Television	13	18	14	13	15	11	11	116	104
Newspaper	53	75	86	82	118	85	37	221	161
Magazine	5	6	5	5	5	4	15	120	104
Others	1	1	1	1	1	0	21	107	88
Total	**72**	**100**	**105**	**100**	**139**	**100**	**32**	**194**	**146**

Annual Growth & Media Split Y2004 - Y2006



Top Brands Y2006 (000 US$)

Television Top Spenders

Rank Brand	**Y2006**	**%Var'n Y06/05**
1 Muscat Arab.c.c.	2597	N
2 Bank Muscat	1028	89
3 Bank Dhofar	879	E
4 Oman Int`l Bank	848	86
5 Gulf Air	721	E
6 Muscat Festival	698	-21
7 Salalah Autumn Festival	676	46
8 Oman Mobile	673	-58
9 Nawras Telecom	453	45
10 Hyundai	423	9
11 Pepsi	382	189
12 Social Sec.corp.	365	N
13 Muscat Int.bk.f.	271	2
14 Oman Song Festival	258	N
15 Al Madina	248	6

Newspapers Top Spenders

Rank Brand	**Y2006**	**%Var'n Y06/05**
1 Nawras Telecom	2767	62
2 Mobile Telecom.s	2670	-24
3 Bank Muscat	2574	12
4 Toyota	1690	-15
5 Oman Tel	1521	-44
6 Lulu Hyper Market	1175	71
7 Oman Int`l Bank	1165	26
8 Muscat Festival	1024	32
9 Hyundai	918	17
10 Nat`l B.oman	812	89
11 Nissan	789	-38
12 Port Of Salalah	748	213
13 Oman Charit.org.	747	276
14 Panasonic	726	89
15 Kia	711	21

Magazines Top Spenders

Rank Brand	**Y2006**	**%Var'n Y06/05**
1 Bank Muscat	278	3
2 Mobile Telecom.s	181	69
3 Nat`l B.oman	121	E
4 Nawras Telecom	120	150
5 Housing B.oman	119	E
6 Mercedes	118	-25
7 Toyota	103	12
8 Oman Tel	98	-3
9 Nissan	72	-21
10 Oman Int`l Bank	72	-22
11 Kia	69	115
12 Hyundai	67	168
13 B.m.w.	65	37
14 Volkswagen	63	149
15 A`saffa	60	63

Outdoor Top Spenders

Rank Brand	**Y2006**	**%Var'n Y06/05**
1 Toyota	51	E
2 Bank Muscat	30	N
3 Oman Int`l Bank	17	255
4 Daihatsu	15	N
5 Ali Shaihani G.	15	N
6 Oman Mobile	6	-34
7 Al Omaniya United	5	-58
8 Muscat Finance	5	-58
9 Nat`l B.oman	5	E
10 Oman Cable	4	-33
11 Oman Lng	4	-67
12 Mountain Dew	4	N
13 Pepsi	3	N
14 Kia	2	N
15 Ali Shahaini F.i	1	N

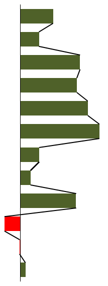
E - Exceeding the limit >300%   N - New

OMAN - Y2006

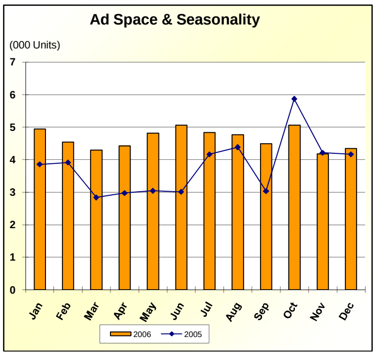
Millions US$ 139 ▲ + 32%
Thousand SESU 56 ▲ + 23%

ADVERTISING SPACE ALLOCATION AND POSITIONING

TOTAL MARKET ADVERTISING SPACE ALLOCATION



Period	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
	2006	2005	% Var'n	2006	% Var'n	2006	% Var'n	2006	% Var'n
January	4949	3858	28	3222	108	319	42	1344	-35
February	4539	3915	16	2787	82	277	33	1321	-38
March	4300	2840	51	3097	56	353	12	820	80
April	4422	2975	49	3148	54	373	15	870	75
May	4820	3045	58	3398	51	339	18	1053	212
June	5068	3010	68	3738	68	304	-8	996	275
July	4839	4168	16	3139	36	275	-1	1395	-8
August	4768	4385	9	2839	39	228	0	1671	-16
September	4495	3033	48	3055	37	204	-22	1237	164
October	5062	5873	-14	3178	-15	306	46	1547	-17
November	4177	4214	-1	3048	19	323	17	776	-42
December	4345	4167	4	3011	11	312	-9	1021	6
	55784	**45483**	**23**	**37661**	**39**	**3614**	**10**	**14051**	**1**

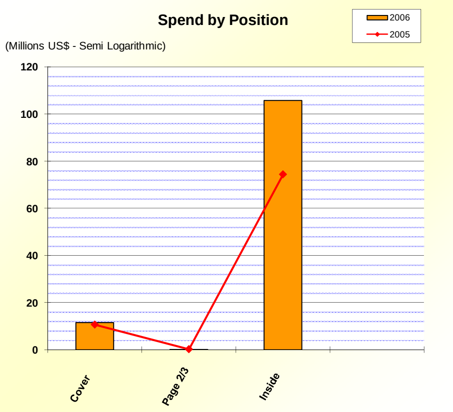


Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

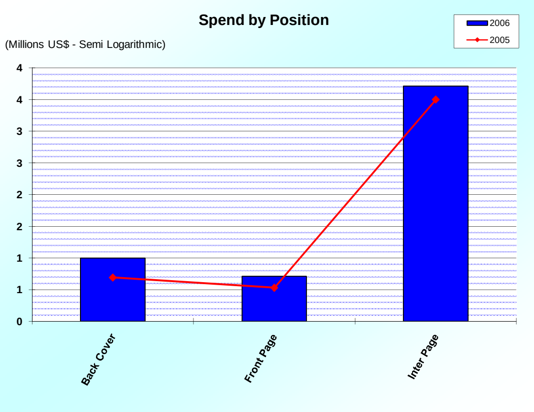
NEWSPAPERS

Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Cover	11	10	11	13	7
Page 2/3	0.20	0	0.24	0	-17
Inside	106	90	74	87	42
	117	**100**	**85**	**100**	**38**



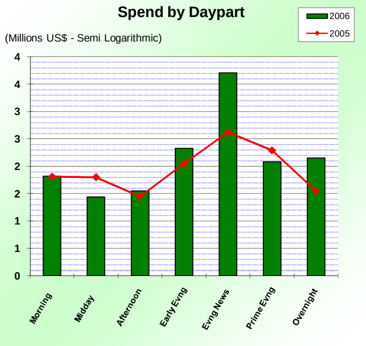
MAGAZINES

Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Back Cover	1	18	1	15	45
Front Page	1	13	1	11	34
Inter Page	4	68	4	74	6
	5	**100**	**5**	**100**	**15**



TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Morning	2	12	2	13	1
Midday	1	10	2	13	-20
Afternoon	2	10	1	11	7
Early Evng	2	15	2	15	14
Evng News	4	25	3	19	42
Prime Evng	2	14	2	17	-9
Overnight	2	14	2	11	39
	15	**100**	**14**	**100**	**11**



TOP 30 LEAGUE OF Y2006 (000 US$)

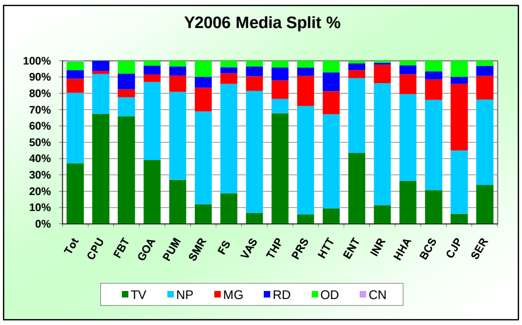
Rank & Brand	JANUARY - DECEMBER		2 YEAR		MEDIA SPLIT % - JAN - DEC 2006			
	2006	2005	TOTAL	AVG	TV	NP	MG	OT*
1 Bank Muscat	3,937	3,133	7,070	3,535	26.12	65.39	7.06	1.42
2 Nawras Telecom	3,340	2,110	5,450	2,725	13.56	82.86	3.59	0.00
3 Mobile Telecom.s	2,852	3,635	6,487	3,243	0.00	93.63	6.36	0.00
4 Muscat Arab.c.c.	2,597	0	2,597	1,298	99.99	0.00	0.00	0.00
5 Toyota	2,138	2,409	4,547	2,274	10.13	79.06	4.80	6.03
6 Oman Int`l Bank	2,101	1,474	3,575	1,788	40.35	55.43	3.41	0.81
7 Oman Tel	1,867	4,004	5,871	2,935	12.78	81.47	5.25	0.48
8 Muscat Festival	1,740	1,676	3,416	1,708	40.11	58.85	1.04	0.00
9 Bank Dhofar	1,512	624	2,136	1,068	58.16	39.91	1.95	0.00
10 Hyundai	1,408	1,199	2,607	1,304	30.08	65.16	4.77	0.00
11 Gulf Air	1,240	388	1,628	814	58.14	41.73	0.12	0.00
12 Lulu Hyper Market	1,182	690	1,872	936	0.00	99.44	0.55	0.00
13 Nat`l B.oman	979	508	1,487	743	1.37	82.90	12.34	3.37
14 Kia	929	914	1,843	922	15.81	76.53	7.48	0.22
15 Salalah Autumn Festival	873	631	1,504	752	77.40	22.61	0.00	0.00
16 Nissan	861	1,363	2,224	1,112	0.00	91.63	8.39	0.00
17 Oman Charit.org.	751	199	950	475	0.00	99.43	0.52	0.00
18 Panasonic	749	406	1,155	577	0.00	96.99	2.95	0.00
19 Port Of Salalah	748	239	987	494	0.00	100.03	0.00	0.00
20 Oman Mobile	711	1,634	2,345	1,173	94.60	0.97	0.00	4.46
21 Global Inv.house	699	24	723	361	0.00	99.56	0.41	0.00
22 United Secur.co.	691	451	1,142	571	0.00	99.57	0.39	0.00
23 Pepsi	655	212	867	434	58.27	41.01	0.31	0.44
24 Chevrolet	650	687	1,337	669	0.00	95.79	4.28	0.00
25 Diwan Of Royal.c	554	743	1,297	648	0.00	99.98	0.00	0.00
26 Oman Nat`l T.co.	540	727	1,267	633	0.00	99.84	0.14	0.00
27 Alliance H.bank	499	570	1,069	535	0.00	88.49	11.55	0.00
28 Al Madina Financ	454	299	753	377	1.06	93.25	5.77	0.00
29 Mitsubishi	450	680	1,130	565	0.00	77.61	10.86	11.56
30 Shell	449	349	798	399	36.74	61.43	1.73	0.00

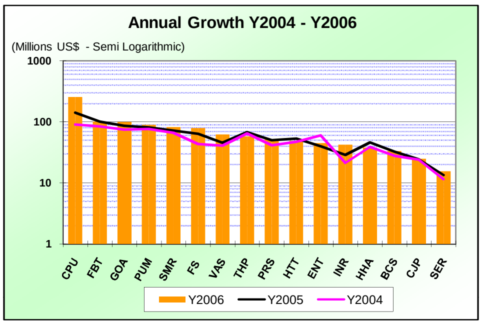
*OT=Radio+OutDoor+Cinema

LEVANT* MEDIA MARKETS Y2006

Millions US$ 1132 ▲ + 19%

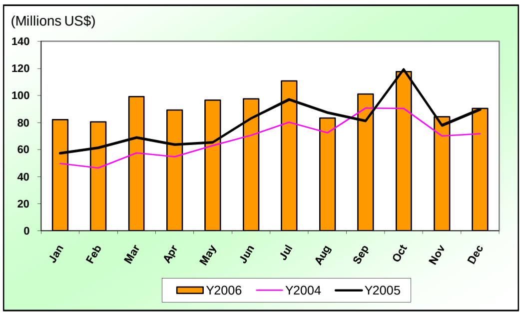
						%Var'n	Media Split %					
Chapter	**Abbreviation**	**Y2004**	**Y2005**	**Y2006**	**Sh%**	**Y06/05**	**TV**	**NP**	**MG**	**RD**	**OD**	**CN**
Communications & Public Utilities	CPU	91	142	256	23	80	67	24	2	6	*	0
Food Beverages And Tobacco	FBT	84	101	101	9	0	66	12	5	10	8	0
Government/Organization Advertising	GOA	75	87	100	9	16	39	48	5	6	3	0
Publishig Media	PUM	77	82	90	8	10	27	54	10	6	4	0
Shopping Malls & Retail Stores	SMR	67	73	83	7	14	12	57	14	7	10	0
Financial Services	FS	44	64	80	7	24	19	67	7	4	4	0
Vehicles,Accessories & Supply	VAS	41	46	63	6	37	7	75	9	6	4	0
Toiletries Hygiene/ House Care Products	THP	65	68	58	5	-15	68	9	11	8	4	0
Professional Services	PRS	42	50	52	5	4	6	66	18	5	4	0
Hotel, Travel & Tourism	HTT	47	54	49	4	-8	10	58	14	12	7	0
Entertainment	ENT	61	40	45	4	13	44	46	5	4	2	0
Insurance & Real Estate	INR	21	29	42	4	46	12	75	11	1	1	0
Household Appliances	HHA	39	46	38	3	-17	27	53	12	5	3	0
Business/Construct Equip. & Supply	BCS	28	32	34	3	3	21	55	13	5	6	0
Clothing,Jewellery & Personal Acs	CJP	24	24	25	2	2	6	39	41	4	10	0
Other Services	SER	12	13	16	1	16	24	52	15	6	3	0
Total		**818**	**952**	**1,132**	**100**	**19**	**37**	**43**	**9**	**5**	**5**	**0**


Y2006 Media Split %


Annual Growth Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

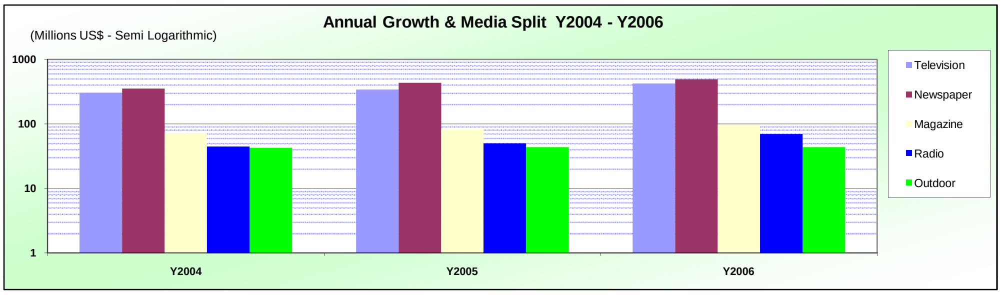
Monthly Spend Analysis (Millions US$)Y2004 - 2006



				Var'n %
Period	**Y2004**	**Y2005**	**Y2006**	**Y06/05**
Jan	50	57	82	43
Feb	46	61	81	31
Mar	58	69	99	44
Apr	55	64	89	40
May	63	65	96	48
Jun	71	83	98	17
Jul	80	97	111	14
Aug	72	87	83	-5
Sep	91	81	101	24
Oct	90	119	118	-1
Nov	70	78	84	8
Dec	72	90	90	0
Total	**818**	**952**	**1132**	**19**

Overall Media Split Analysis (Millions US$)

Media	Y2004		Y2005		Y2006		Var'n %	Growth Index*	
	Value	**Sh%**	**Value**	**Sh%**	**Value**	**Sh%**	**Y2005/2006**	**Y06**	**Y05**
Television	306	37	341	36	426	38	25	139	111
Newspaper	352	43	434	46	495	44	14	140	123
Magazine	71	9	83	9	98	9	17	137	117
Radio	45	6	50	5	70	6	39	156	112
Outdoor	43	5	44	5	44	4	0	101	102
Total	**818**	**100**	**952**	**100**	**1,132**	**100**	**19**	**139**	**117**


Annual Growth & Media Split Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

Top Brands Y2006 (000 US$)

Television Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Pepsi	11942	10
2	Byblos	10989	4
3	Coca Cola	9904	15
4	Ranin	6763	171
5	Pantene	5762	-12
6	Vodafone	4874	90
7	Mobinil	4579	1
8	Ariel	4507	-32
9	Head & Shoulders	4486	-14
10	Nido	4401	32
11	Net Vision	4110	E
12	Persil	3940	47

Newspapers Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Mobinil	12023	87
2	Vodafone	8013	61
3	Nat`l B.egypt	7266	29
4	Arab Bank	4019	29
5	Theatre Art.house	3929	N
6	Hyundai	3787	10
7	Telecom Egypt	3783	67
8	Jordan National	3700	20
9	Fastlink	3195	-30
10	Egypt Air	2896	6
11	Ranin	2611	E
12	Mobilecom	2608	-21

Magazines Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Sokhna Port	2083	E
2	Zanussi	2063	E
3	Mobinil	1049	35
4	Telecom Egypt	756	63
5	Toyota	707	8
6	Tecnogas	544	82
7	Virgin Megastore	506	149
8	Egypt Air	459	-14
9	Fiance`e	433	E
10	Nokia	420	-49
11	Oris	407	E
12	Rolex	378	24

Radio Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Vodafone	2510	57
2	Mobinil	2262	83
3	Pepsi	1009	65
4	Coca Cola	699	18
5	Ringo	594	E
6	Eta	583	N
7	Aramex	567	62
8	Chevrolet	517	175
9	Cadbury	484	12
10	Family Health	481	N
11	Shell	473	98
12	Aquarium	428	2

Outdoor Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Aishti	1592	-13
2	Ciment Liban	1060	N
3	Hariri	940	N
4	Winston	920	E
5	Kentucky	875	-5
6	Bhv	709	-24
7	Byblos	626	25
8	City Mall	593	57
9	Gandour	508	116
10	Halls	504	N
11	Daniela Tobler	489	170
12	Hardees	488	-34

E - Exceeding the limit >300%   N - New

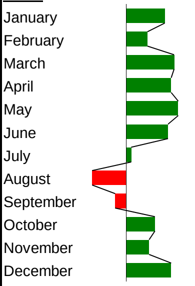
LEVANT* MEDIA MARKETS Y2006

Millions US$ 1132 ▲ + 19%

Thousand SESU 1639 ▲ + 13%

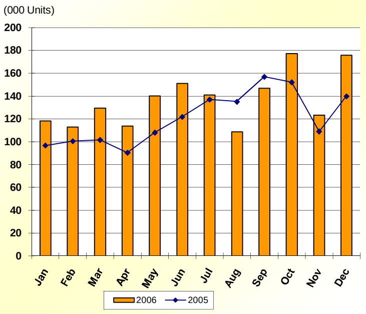
TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2006/2005Var %



	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
Period	**2006**	**2005**	**% Var'n**	**2006**	**% Var'n**	**2006**	**% Var'n**	**2006**	**% Var'n**
January	118303	96801	22	4779	5	4548	7	52590	22
February	112969	100623	12	5788	18	4182	13	46524	18
March	129560	101597	28	7279	29	4596	27	62151	32
April	113863	90501	26	6743	25	5206	31	42616	9
May	140190	108033	30	7562	26	4784	21	60719	45
June	150998	121768	24	7119	-4	4556	5	62023	23
July	140994	137008	3	8957	1	5567	22	53686	-9
August	108767	135186	-20	7129	-11	3994	-24	55769	11
September	146922	156881	-6	8373	17	4015	2	59999	23
October	177274	152128	17	6744	-19	4213	-20	72526	14
November	123390	109085	13	6127	4	5031	3	55774	12
December	175972	139959	26	9601	31	7064	-8	94565	62
	1639202	**1449567**	**13**	**86201**	**8**	**57755**	**4**	**718944**	**22**

Ad Space & Seasonality



Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

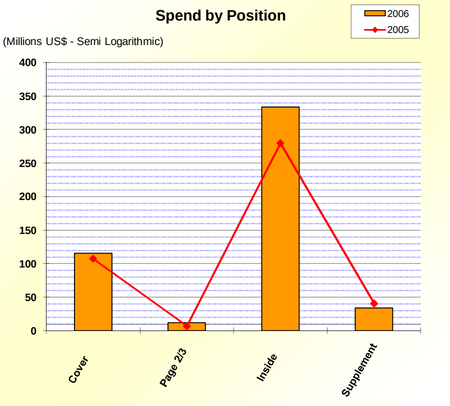
* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

NEWSPAPERS

Spend by Position	**2006**		**2005**		**Var'n %**
(Millions US $)	Value	%	Value	%	
Cover	116	23	107	25	8
Page 2/3	12	2	7	2	76
Inside	334	67	280	64	19
Supplement	34	7	40	9	-16
	495	**100**	**434**	**100**	**14**

Spend by Position

(Millions US$ - Semi Logarithmic)

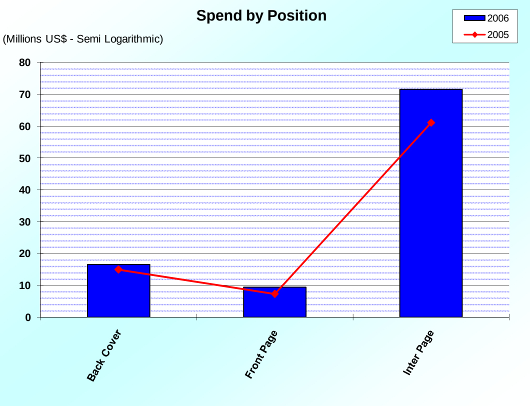


MAGAZINES

Spend by Position	**2006**		**2005**		**Var'n %**
(Millions US $)	Value	%	Value	%	
Back Cover	17	17	15	18	11
Front Page	9	10	7	9	30
Inter Page	72	73	61	73	17
	98	**100**	**83**	**100**	**17**

Spend by Position

(Millions US$ - Semi Logarithmic)

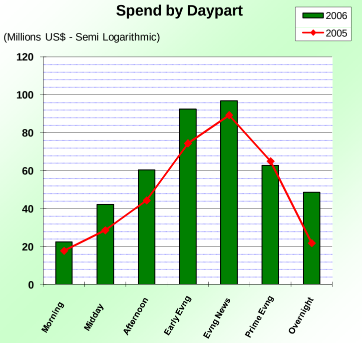


TELEVISION - KSA Time

Spend by Daypart	**2006**		**2005**		**Var'n**
(Millions US $)	Value	%	Value	%	**%**
Morning	22	5	18	5	26
Midday	42	10	29	8	47
Afternoon	60	14	44	13	36
Early Evng	92	22	74	22	24
Evng News	97	23	89	26	9
Prime Evng	63	15	65	19	-3
Overnight	49	11	22	6	123
	426	**100**	**341**	**100**	**25**

Spend by Daypart

(Millions US$ - Semi Logarithmic)



TOP 30 LEAGUE OF Y2006 (000 US$)

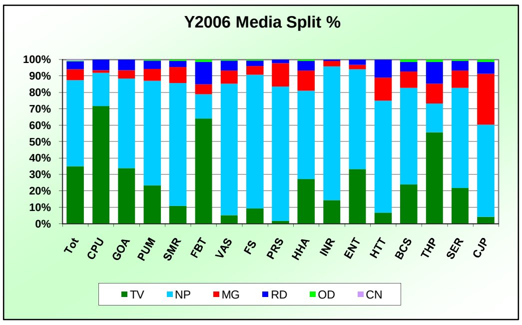
Rank & Brand	**JANUARY - DECEMBER**		**2 YEAR**		**MEDIA SPLIT % - JAN - DEC 2006**			
	2006	**2005**	**TOTAL**	**AVG**	**TV**	**NP**	**MG**	**OT***
1 Mobinil	19,956	12,959	32,915	16,458	22.95	60.25	5.26	11.55
2 Vodafone	15,856	9,480	25,336	12,668	30.74	50.54	1.71	17.02
3 Pepsi	15,200	12,496	27,696	13,848	78.57	12.57	0.76	8.11
4 Coca Cola	12,111	9,947	22,058	11,029	81.78	9.17	2.97	6.09
5 Byblos	11,938	11,282	23,220	11,610	92.05	1.92	0.64	5.39
6 Ranin	9,376	3,095	12,471	6,236	72.13	27.85	0.02	0.00
7 Nat`l B.egypt	8,405	7,475	15,880	7,940	8.49	86.45	2.90	2.15
8 Pantene	6,065	7,315	13,380	6,690	95.00	0.00	3.23	1.76
9 Ariel	4,993	6,953	11,946	5,973	90.27	1.76	2.74	5.23
10 Arab Bank	4,981	3,680	8,661	4,331	12.73	80.69	3.96	2.63
11 Telecom Egypt	4,811	3,288	8,099	4,050	0.00	78.63	15.71	5.65
12 Blom Bank	4,741	3,964	8,705	4,353	81.94	10.95	4.91	2.19
13 Talaat Moustaf.group	4,740	0	4,740	2,370	42.59	54.79	1.65	0.97
14 Head & Shoulders	4,603	5,450	10,053	5,027	97.46	0.00	2.30	0.24
15 Nido	4,601	3,720	8,321	4,161	95.65	0.89	0.22	3.24
16 Hyundai	4,520	4,324	8,844	4,422	8.52	83.78	1.50	6.19
17 Persil	4,209	2,858	7,067	3,534	93.61	0.95	0.29	5.16
18 Net Vision	4,185	469	4,654	2,327	98.21	0.00	0.00	1.79
19 Nokia	4,163	5,923	10,086	5,043	29.14	44.94	10.09	15.83
20 Fastlink	4,081	5,721	9,802	4,901	15.12	78.29	1.79	4.80
21 Theatre Art.house	3,938	0	3,938	1,969	0.03	99.77	0.20	0.00
22 Nissan	3,876	2,666	6,542	3,271	30.88	44.40	6.60	18.11
23 7-up	3,837	3,988	7,825	3,913	79.38	11.31	1.54	7.77
24 Jordan National	3,830	3,219	7,049	3,525	1.04	96.61	0.52	1.83
25 Tide	3,797	4,342	8,139	4,070	98.24	0.40	0.00	1.37
26 Pampers	3,693	5,092	8,785	4,393	86.57	4.22	2.46	6.74
27 Toyota	3,680	3,703	7,383	3,692	13.04	58.83	19.21	8.91
28 Umniah	3,666	1,983	5,649	2,825	29.41	61.67	1.45	7.47
29 Chevrolet	3,607	2,058	5,665	2,833	32.24	49.85	2.47	15.44
30 Egypt Air	3,484	3,324	6,808	3,404	0.95	83.12	13.17	2.76

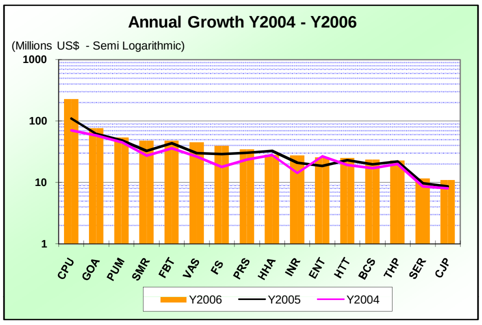
*OT=Radio+OutDoor+Cinema

EGYPT* - Y2006

Millions US$ 754 ▲ + 40%

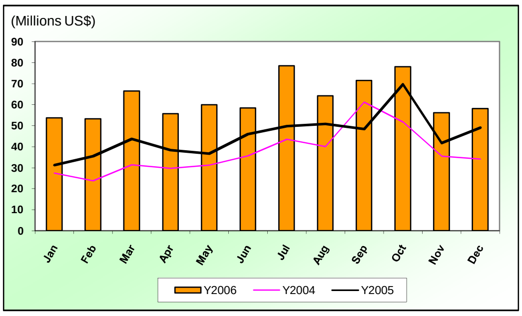
Chapter	Abbreviation	Y2004	Y2005	Y2006	Sh%	%Var'n Y06/05	Media Split % TV	NP	MG	RD	OD	CN
Communications & Public Utilities	CPU	70	110	230	30	109	72	20	2	7	*	0
Government/Organization Advertising	GOA	58	62	77	10	25	34	54	5	7	*	0
Publishig Media	PUM	45	48	54	7	12	23	64	7	5	1	0
Shopping Malls & Retail Stores	SMR	27	33	48	6	48	11	75	10	4	1	0
Food Beverages And Tobacco	FBT	36	44	48	6	10	64	15	6	14	1	0
Vehicles,Accessories & Supply	VAS	26	30	46	6	53	5	80	8	6	1	0
Financial Services	FS	18	29	40	5	37	9	82	5	3	1	0
Professional Services	PRS	24	30	35	5	14	2	82	14	2	*	0
Household Appliances	HHA	28	33	28	4	-14	27	54	12	6	1	0
Insurance & Real Estate	INR	14	21	28	4	33	14	81	3	1	*	0
Entertainment	ENT	26	19	26	3	40	33	61	3	3	*	0
Hotel, Travel & Tourism	HTT	19	23	25	3	10	7	68	14	11	*	0
Business/Construct Equip. & Supply	BCS	17	20	24	3	21	24	59	10	6	1	0
Toiletries Hygiene/ House Care Products	THP	20	22	23	3	5	56	17	12	13	1	0
Other Services	SER	9	10	12	2	21	22	61	10	6	1	0
Clothing,Jewellery & Personal Acs	CJP	8	9	11	1	28	4	56	31	7	1	0
Total		**445**	**540**	**754**	**100**	**40**	**35**	**53**	**7**	**5**	**0**	**1**


Y2006 Media Split %


Annual Growth Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

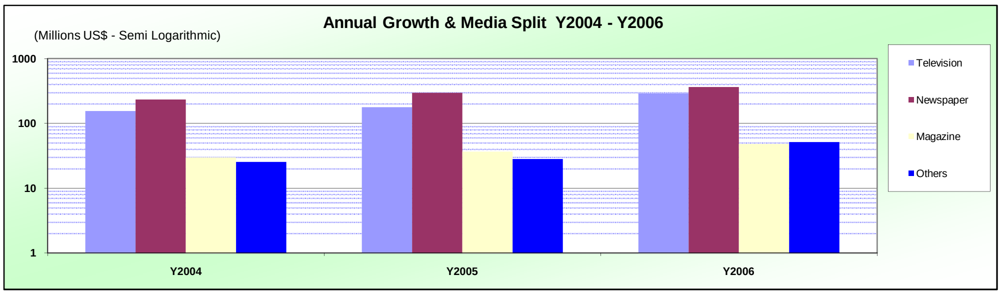
Monthly Spend Analysis (Millions US$)Y2004 - 2006



Period	Y2004	Y2005	Y2006	Var'n % Y06/05
Jan	27	31	54	72
Feb	24	35	53	50
Mar	31	44	67	52
Apr	30	38	56	45
May	31	37	60	64
Jun	36	46	58	27
Jul	44	50	78	58
Aug	40	51	64	26
Sep	61	48	72	48
Oct	52	70	78	12
Nov	35	42	56	35
Dec	34	49	58	19
Total	**445**	**540**	**754**	**40**

Overall Media Split Analysis (Millions US$)

Media	Y2004		Y2005		Y2006		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2005/2006	Y06	Y05
Television	156	35	178	33	289	38	63	186	114
Newspaper	234	53	297	55	365	48	23	156	127
Magazine	30	7	37	7	48	6	31	160	122
Others	26	6	28	5	51	7	82	201	110
Total	**445**	**100**	**540**	**100**	**754**	**100**	**39**	**169**	**121**


Annual Growth & Media Split Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

Top Brands Y2006 (000 US$)

Television Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Ranin	6763	171
2	Vodafone	4874	90
3	Mobinil	4579	1
4	Pepsi	4343	58
5	Net Vision	4110	E
6	Coca Cola	2891	44
7	Talaat Moustaf.group	2019	N
8	Childern Cancer	1955	31
9	Chipsy	1733	-29
10	African Nations	1590	E
11	Conprehensive H.	1447	-15
12	Family Health	1361	194

Newspapers Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Mobinil	12023	87
2	Vodafone	8013	61
3	Nat`l B.egypt	7266	29
4	Theatre Art.house	3929	N
5	Telecom Egypt	3783	67
6	Hyundai	3363	8
7	Egypt Air	2835	7
8	Ranin	2611	E
9	Talaat Moustaf.group	2597	N
10	Banque Misr	2278	48
11	Panasonic	2241	21
12	Al Masreya	2186	26

Magazines Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Sokhna Port	2083	E
2	Zanussi	2063	E
3	Mobinil	1049	36
4	Telecom Egypt	756	63
5	Toyota	618	-1
6	Tecnogas	544	82
7	Egypt Air	447	-16
8	Fiance`e	433	E
9	Sports Page	350	N
10	Al Salab	339	219
11	Coca Cola	321	25
12	Kiriazi	309	18

Radio Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Vodafone	2510	57
2	Mobinil	2262	83
3	Pepsi	829	59
4	Coca Cola	642	19
5	Ringo	594	E
6	Eta	583	N
7	Aramex	567	68
8	Chevrolet	493	194
9	Cadbury	484	11
10	Family Health	481	N
11	Shell	473	98
12	Raya	405	274

Outdoor Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Vodafone	188	-18
2	Five Fives	82	N
3	Constitute C.f.	72	E
4	Al Saray Mall	59	N
5	Al Masryeen	52	E
6	I2	51	N
7	Croke	50	N
8	Nestle	43	N
9	Mobinil	43	N
10	Ariel	38	N
11	Fiance`e	36	N
12	Nesvita	35	N

E - Exceeding the limit >300%   N - New

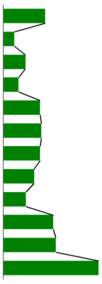
EGYPT* - Y2006

Millions US$ 754 ▲ + 40%

Thousand SESU 950 ▲ + 37%

TOTAL MARKET ADVERTISING SPACE ALLOCATION

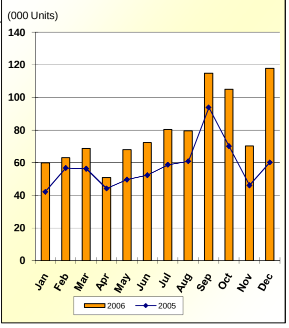
Y2006/2005Var %



Period	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)		OD - Metro
	2006	2005	% Var'n	2006	% Var'n	2006	% Var'n	2006	% Var'n	
January	59826	42234	42	1730	40	2021	5	29687	33	18316
February	62932	56810	11	1820	27	1905	23	27073	14	23932
March	68740	56404	22	2557	39	1972	8	35744	22	18838
April	50841	44247	15	1935	25	1999	6	18467	-20	19204
May	67894	49718	37	2072	40	2030	18	35204	46	19739
June	72192	52430	38	1702	-11	1492	-11	34302	32	23391
July	80252	58830	36	2526	23	2843	32	38635	43	24171
August	79538	60922	31	2465	9	2522	-2	44419	82	23519
September	114856	93916	22	2497	17	2195	-1	43336	83	19204
October	105103	70163	50	2076	1	2013	-19	37620	77	19204
November	70363	46194	52	2146	24	2851	40	38473	74	19204
December	117720	60305	95	4516	139	3882	-2	74148	162	
	950256	**692173**	**37**	**28043**	**30**	**27724**	**7**	**457110**	**55**	**228720**

Ad Space & Seasonality

(000 Units)



Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

NEWSPAPERS

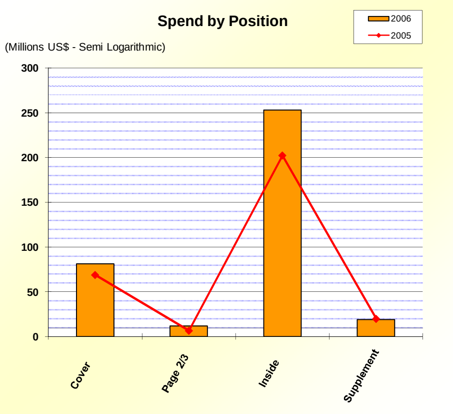
Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Cover	81	22	69	23	18
Page 2/3	12	3	7	2	78
Inside	253	69	202	68	25
Supplement	19	5	20	7	-4
	365	**100**	**297**	**100**	**23**

MAGAZINES

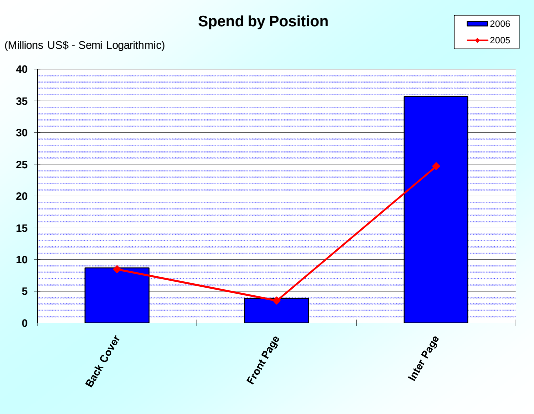
Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Back Cover	9	18	8	23	2
Front Page	4	8	4	10	10
Inter Page	36	74	25	67	44
	48	**100**	**37**	**100**	**31**

TELEVISION - KSA Time

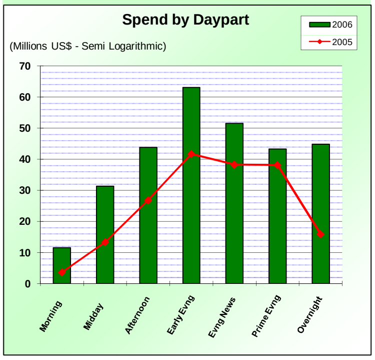
Spend by Daypart (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Morning	12	4	4	2	213
Midday	31	11	13	7	135
Afternoon	44	15	27	15	63
Early Evng	63	22	42	23	51
Evng News	52	18	38	22	35
Prime Evng	43	15	38	21	14
Overnight	45	15	16	9	181
	289	**100**	**178**	**100**	**63**


Spend by Position

(Millions US$ - Semi Logarithmic)


Spend by Position

(Millions US$ - Semi Logarithmic)


Spend by Daypart

(Millions US$ - Semi Logarithmic)

TOP 30 LEAGUE OF Y2006 (000 US$)

Rank & Brand	JANUARY - DECEMBER		2 YEAR		MEDIA SPLIT % - JAN - DEC 2006			
	2006	2005	TOTAL	AVG	TV	NP	MG	OT*
1 Mobinil	19,957	12,953	32,910	16,455	22.95	60.25	5.25	11.55
2 Vodafone	15,855	9,481	25,336	12,668	30.74	50.54	1.71	17.02
3 Ranin	9,375	3,094	12,469	6,235	72.13	27.85	0.02	0.00
4 Nat`l B.egypt	8,405	7,475	15,880	7,940	8.49	86.45	2.91	2.15
5 Pepsi	7,031	3,890	10,921	5,461	61.77	24.72	1.51	12.00
6 Coca Cola	4,917	3,063	7,980	3,990	58.79	20.95	6.52	13.75
7 Telecom Egypt	4,811	3,288	8,099	4,050	0.00	78.63	15.72	5.66
8 Talaat Moustaf.group	4,740	0	4,740	2,370	42.59	54.79	1.65	0.97
9 Net Vision	4,185	469	4,654	2,327	98.20	0.00	0.00	1.80
10 Theatre Art.house	3,939	0	3,939	1,969	0.04	99.75	0.21	0.00
11 Hyundai	3,553	3,252	6,805	3,403	2.69	94.65	0.53	2.14
12 Egypt Air	3,412	3,245	6,657	3,328	0.98	83.08	13.11	2.82
13 Banque Misr	3,402	1,700	5,102	2,551	25.84	66.95	1.27	5.93
14 Zanussi	3,158	1,286	4,444	2,222	7.60	26.42	65.32	0.65
15 Chevrolet	3,088	1,650	4,738	2,369	36.40	45.01	2.03	16.55
16 Childern Cancer	2,849	2,469	5,318	2,659	68.64	20.37	2.05	8.94
17 Te Data	2,680	728	3,408	1,704	8.04	72.12	8.92	10.94
18 Sokhna Port	2,524	333	2,857	1,428	0.00	17.47	82.52	0.00
19 Toshiba	2,410	1,689	4,099	2,050	55.74	25.74	4.96	13.57
20 Panasonic	2,388	2,127	4,515	2,258	3.48	93.84	0.37	2.32
21 Al Masreya	2,381	1,866	4,247	2,124	0.00	91.81	3.74	4.47
22 Raya	2,375	925	3,300	1,650	29.87	50.52	1.38	18.24
23 Eta	2,342	0	2,342	1,171	55.33	16.33	2.41	25.94
24 Toyota	2,196	2,353	4,549	2,274	3.72	67.64	28.13	0.50
25 Nokia	2,185	2,622	4,807	2,404	31.71	49.06	7.42	11.81
26 Al Forsan Co.	2,166	1,770	3,936	1,968	0.00	95.38	4.32	0.29
27 Link Dot Net	2,111	2,129	4,240	2,120	11.18	72.10	4.11	12.62
28 Nissan	1,967	1,246	3,213	1,606	12.93	67.86	7.28	11.91
29 Panasonic Servce	1,931	962	2,893	1,446	0.00	99.99	0.00	0.00
30 African Nations	1,927	17	1,944	972	82.53	17.39	0.10	0.00

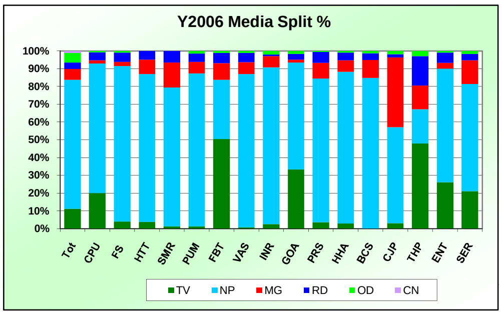
*OT=Radio+OutDoor+Cinema

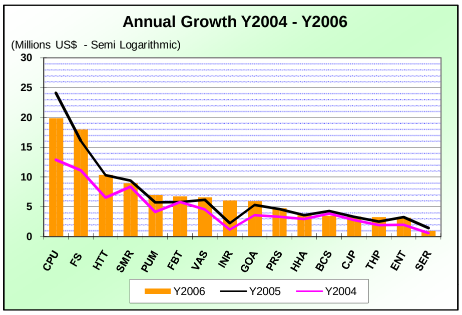
JORDAN - Y2006

Millions US$ 112 ▲ + 4%

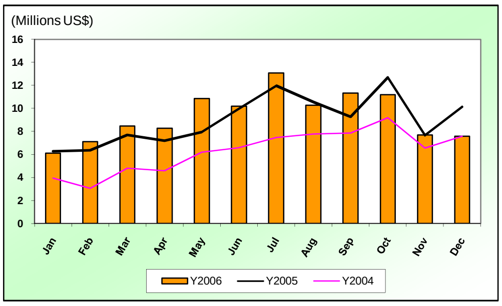
Advertising Expenditure for Chapters (Millions US$) Y2004 - 2006(Jan - Dec)

						%Var'n	Media Split %					
Chapter	**Abbreviation**	**Y2004**	**Y2005**	**Y2006**	**Sh%**	**Y06/05**	**TV**	**NP**	**MG**	**RD**	**OD**	**CN**
Communications & Public Utilities	CPU	13	24	20	18	-18	20	73	2	5	1	0
Financial Services	FS	11	16	18	16	12	4	88	2	5	1	0
Hotel, Travel & Tourism	HTT	7	10	10	9	1	4	83	8	5	*	0
Shopping Malls & Retail Stores	SMR	8	9	9	8	-4	1	78	14	7	*	0
Publishig Media	PUM	4	6	7	6	22	1	86	6	5	2	0
Food Beverages And Tobacco	FBT	6	6	7	6	18	51	33	10	6	1	0
Vehicles,Accessories & Supply	VAS	5	6	7	6	7	1	86	7	5	1	0
Insurance & Real Estate	INR	1	2	6	5	173	3	88	6	1	2	0
Government/Organization Advertising	GOA	4	5	6	5	13	33	60	2	3	2	0
Professional Services	PRS	3	5	5	4	4	4	81	9	6	1	0
Household Appliances	HHA	3	4	4	3	0	3	86	7	4	1	0
Business/Construct Equip. & Supply	BCS	4	4	4	3	-18	*	85	10	4	1	0
Clothing,Jewellery & Personal Acs	CJP	3	3	3	3	3	3	54	39	2	2	0
Toiletries Hygiene/ House Care Products	THP	2	3	3	3	30	48	19	13	17	3	0
Entertainment	ENT	2	3	3	3	-3	26	64	3	6	1	0
Other Services	SER	1	1	1	1	-30	21	60	13	4	2	0
Total		**76**	**108**	**112**	**100**	**4**	**11**	**73**	**6**	**4**	**6**	**1**





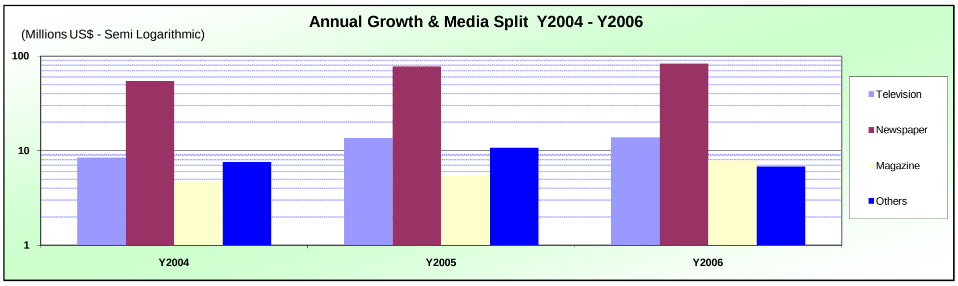
Monthly Spend Analysis (Millions US$)Y2004 - 2006



				Var'n %
Period	**Y2004**	**Y2005**	**Y2006**	**Y06/05**
Jan	4	6	6	-3
Feb	3	6	7	12
Mar	5	8	8	10
Apr	5	7	8	15
May	6	8	11	37
Jun	7	10	10	2
Jul	7	12	13	9
Aug	8	11	10	-3
Sep	8	9	11	22
Oct	9	13	11	-12
Nov	7	8	8	0
Dec	8	10	8	-25
Total	**76**	**108**	**112**	**4**

Overall Media Split Analysis (Millions US$)

Media	**Y2004**		**Y2005**		**Y2006**		**Var'n %**	**Growth Index***	
	Value	**Sh%**	**Value**	**Sh%**	**Value**	**Sh%**	**Y2005/2006**	**Y06**	**Y05**
Television	8	11	14	13	14	12	1	164	163
Newspaper	55	73	78	72	84	75	7	152	142
Magazine	5	6	5	5	8	7	46	168	114
Others	8	10	11	10	7	6	-37	90	143
Total	**76**	**100**	**108**	**100**	**112**	**100**	**4**	**148**	**143**



Top Brands Y2006 (000 US$)

Television Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Umniah	1078	57
2	Fastlink	617	-23
3	Pepsi	599	21
4	Mobilecom	554	E
5	Fine	493	254
6	Sama Telecom	346	N
7	Coca Cola	343	25
8	7-up	329	28
9	Domet Ward	315	N
10	Mountain Dew	313	60
11	Usaid	276	N
12	Head & Shoulders	236	115

Newspapers Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Jordan National	3700	20
2	Fastlink	3195	-30
3	Arab Bank	2717	19
4	Mobilecom	2608	-21
5	Umniah	2261	90
6	Housing Bank	1943	48
7	Jordan Telecom	1475	-12
8	Cairo Amman Bank	1100	69
9	Dallas	756	41
10	B.of Jordan Ltd	755	-33
11	Holiday T. & T.	693	N
12	Capital Bank Ltd	641	N

Magazines Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Royal Jordanian	103	112
2	Kurdi Jewelry	100	33
3	Mobilecom	83	46
4	Damas	80	E
5	Breitling	80	189
6	Chopard	78	65
7	Fastlink	73	69
8	Jwico	68	64
9	Nokia	67	84
10	Arab Bank	66	155
11	Hsbc	62	85
12	Ayla Oasis Dv.co	61	N

Radio Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Fine	271	158
2	Umniah	236	E
3	Cadillac	214	-20
4	Rocca	210	N
5	Fastlink	196	-29
6	Egyptian Arab L.	128	7
7	Visa	128	N
8	Cairo Amman Bank	121	98
9	Usaid	112	93
10	Mobilecom	110	-70
11	Jordan Telecom	108	-14
12	Catalyst	103	110

Outdoor Top Spenders

Rank	**Brand**	**Y2006**	**%Var'n Y06/05**
1	Jordan Telecom	44	-26
2	B.of Jordan Ltd	44	1
3	Umniah	38	-43
4	Mobilecom	31	-25
5	Mcdonald`s	30	-74
6	Insurance Commis	29	-50
7	Pantene	29	-61
8	Societe Generale	29	-22
9	Xpress	26	-70
10	Pwc Logistics	26	78
11	Sunsilk	24	280
12	Nike	23	N

E - Exceeding the limit >300%   N - New

JORDAN - Y2006

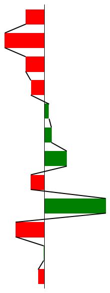
ADVERTISING SPACE ALLOCATION AND POSITIONING

Millions US$ 112 ▲ + 4%

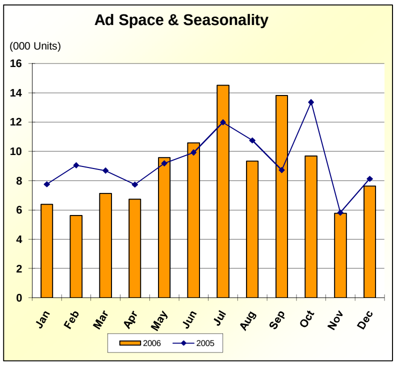
Thousand SESU 107 ▼ - 4%

TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2006/2005Var %



Period	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
	2006	2005	% Var'n	2006	% Var'n	2006	% Var'n	2006	% Var'n
January	6379	7759	-18	2010	0	502	61	1978	-12
February	5620	9061	-38	2785	34	504	43	1274	-65
March	7119	8695	-18	3364	36	625	74	1401	-60
April	6723	7738	-13	3462	21	533	48	1206	-40
May	9572	9188	4	4115	38	729	44	1884	-28
June	10579	9927	7	3918	9	613	58	3212	9
July	14521	11986	21	5104	5	676	50	2197	-31
August	9333	10752	-13	3932	-5	545	6	2159	1
September	13808	8725	58	4477	34	628	33	2154	-17
October	9678	13354	-28	3565	-18	586	17	5526	6
November	5768	5827	-1	2813	3	569	61	2386	91
December	7623	8129	-6	4005	6	727	-4	2892	14
	106724	**111142**	**-4**	**43550**	**11**	**7237**	**36**	**28270**	**-17**

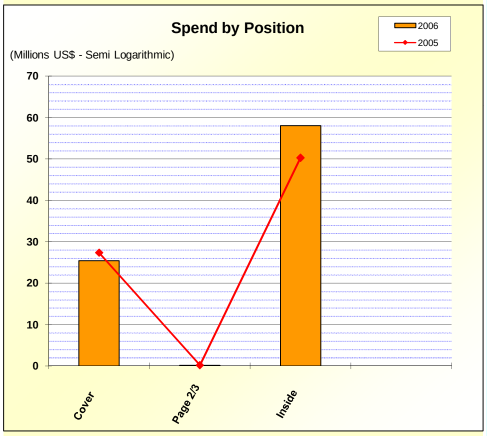


Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

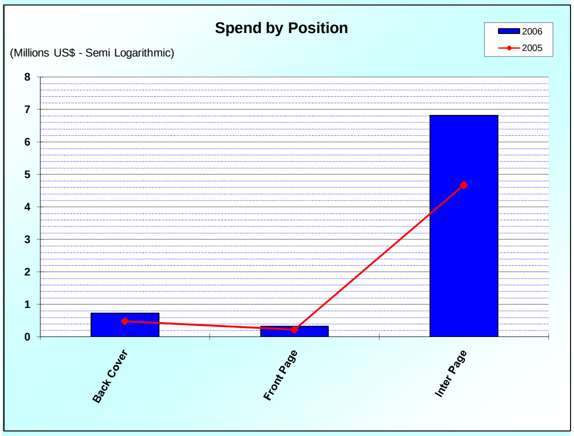
NEWSPAPERS

Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Cover	25	30	27	35	-7
Page 2/3	0.15	0	0.20	0	-25
Inside	58	69	50	65	15
	84	**100**	**78**	**100**	**7**



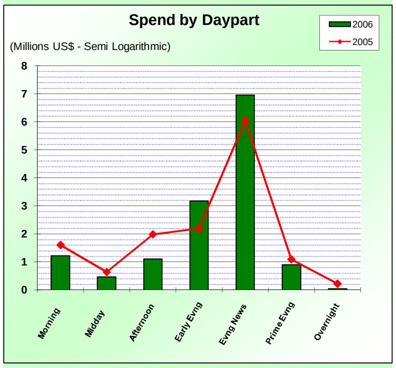
MAGAZINES

Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Back Cover	1	9	0	9	52
Front Page	0	4	0	4	50
Inter Page	7	87	5	87	46
	8	**100**	**5**	**100**	**47**



TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Morning	1	9	2	12	-24
Midday	0	3	1	5	-27
Afternoon	1	8	2	14	-44
Early Evng	3	23	2	16	45
Evng News	7	50	6	44	15
Prime Evng	1	6	1	8	-17
Overnight	0	0	0	2	-77
	14	**100**	**14**	**100**	**1**



TOP 30 LEAGUE OF Y2006 (000 US$)

Rank & Brand	JANUARY - DECEMBER		2 YEAR		MEDIA SPLIT % - JAN - DEC 2006			
	2006	2005	TOTAL	AVG	TV	NP	MG	OT*
1 Fastlink	4,082	5,721	9,803	4,901	15.10	78.27	1.80	4.81
2 Jordan National	3,830	3,217	7,047	3,523	1.05	96.61	0.51	1.82
3 Umniah	3,666	1,983	5,649	2,825	29.41	61.68	1.44	7.47
4 Mobilecom	3,386	3,852	7,238	3,619	16.35	77.03	2.44	4.16
5 Arab Bank	2,878	2,718	5,596	2,798	1.17	94.40	2.30	2.12
6 Housing Bank	2,142	1,540	3,682	1,841	7.20	90.71	1.87	0.20
7 Jordan Telecom	1,789	2,073	3,862	1,931	7.08	82.42	1.99	8.50
8 Cairo Amman Bank	1,260	719	1,979	989	1.94	87.27	0.73	10.04
9 B.of Jordan Ltd	1,021	1,459	2,480	1,240	11.83	73.99	1.09	13.09
10 Royal Jordanian	824	474	1,298	649	28.15	58.13	12.45	1.26
11 Fine	766	429	1,195	597	64.32	0.03	0.32	35.32
12 Dallas	760	536	1,296	648	0.00	99.47	0.59	0.00
13 Pepsi	750	769	1,519	760	79.81	11.96	0.40	7.90
14 Holiday T. & T.	697	0	697	349	0.00	99.40	0.65	0.00
15 Capital Bank Ltd	697	0	697	348	0.00	92.03	2.31	5.66
16 Ayla Oasis Dv.co	688	61	749	375	0.00	89.54	8.84	1.66
17 Saraya Aqaba	594	238	832	416	0.00	93.29	6.77	0.00
18 Wanadoo	591	730	1,321	660	0.71	83.49	0.33	15.47
19 Nokia	547	1,000	1,547	774	0.00	73.55	12.20	14.30
20 Jordan Aviation	498	823	1,321	661	0.00	100.05	0.00	0.00
21 Toyota	494	437	931	465	0.00	86.97	9.58	3.35
22 Sony Ericsson	491	453	944	472	0.00	96.95	3.13	0.00
23 Coca Cola	488	474	962	481	70.27	16.45	0.67	12.66
24 Next	448	10	458	229	0.00	100.08	0.00	0.00
25 Batelco	435	183	618	309	0.00	89.64	0.53	9.93
26 Cadillac	428	358	786	393	0.00	41.55	4.94	53.42
27 Jordan Comm.bank	422	529	951	476	0.00	96.55	3.48	0.00
28 Tala Bay	421	81	502	251	0.00	87.14	12.96	0.00
29 Al Dostoor	421	799	1,220	610	1.10	98.83	0.07	0.00
30 Sun White	421	286	707	353	35.85	41.58	14.05	8.41

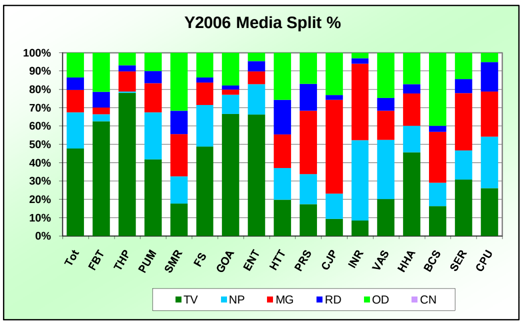
*OT=Radio+OutDoor+Cinema

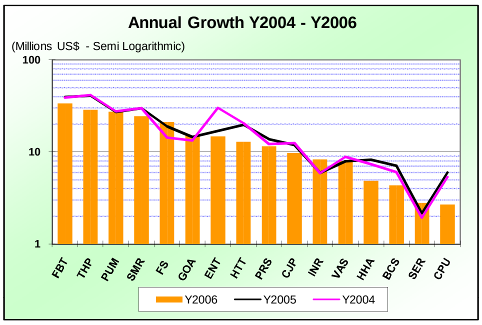
LEBANON - Y2006

Millions US$ 231 ▼ - 14%

Advertising Expenditure for Chapters (Millions US$) Y2004 - 2006(Jan - Dec)

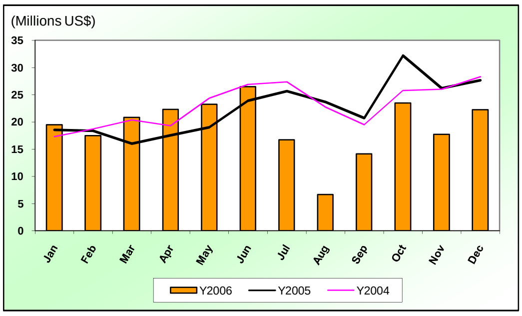
Chapter	Abbreviation	Y2004	Y2005	Y2006	Sh%	%Var'n Y06/05	TV	NP	MG	RD	OD	CN
							Media Split %					
Food Beverages And Tobacco	FBT	39	39	34	15	-15	63	4	4	9	21	0
Toiletries Hygiene/ House Care Products	THP	41	41	29	12	-29	78	1	11	3	7	0
Publishig Media	PUM	28	27	27	12	1	42	26	16	7	10	0
Shopping Malls & Retail Stores	SMR	30	30	24	11	-18	18	15	23	13	32	0
Financial Services	FS	14	19	21	9	12	49	23	12	3	13	0
Government/Organization Advertising	GOA	13	14	15	7	4	67	11	3	2	18	0
Entertainment	ENT	30	17	15	6	-12	66	17	7	6	5	0
Hotel, Travel & Tourism	HTT	20	20	13	6	-34	20	17	18	19	26	0
Professional Services	PRS	12	14	12	5	-15	17	16	35	15	17	0
Clothing,Jewellery & Personal Acs	CJP	13	12	10	4	-18	9	14	51	3	23	0
Insurance & Real Estate	INR	6	6	8	4	41	8	44	42	3	3	0
Vehicles,Accessories & Supply	VAS	9	8	8	3	1	20	32	16	7	25	0
Household Appliances	HHA	7	8	5	2	-41	46	15	18	5	17	0
Business/Construct Equip. & Supply	BCS	6	7	4	2	-38	16	13	28	3	40	0
Other Services	SER	2	2	3	1	30	31	16	31	8	14	0
Communications & Public Utilities	CPU	5	6	3	1	-55	26	28	25	16	5	0
Total		**276**	**270**	**231**	**100**	**-14**	**48**	**20**	**12**	**7**	**13**	**0**


Y2006 Media Split %


Annual Growth Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

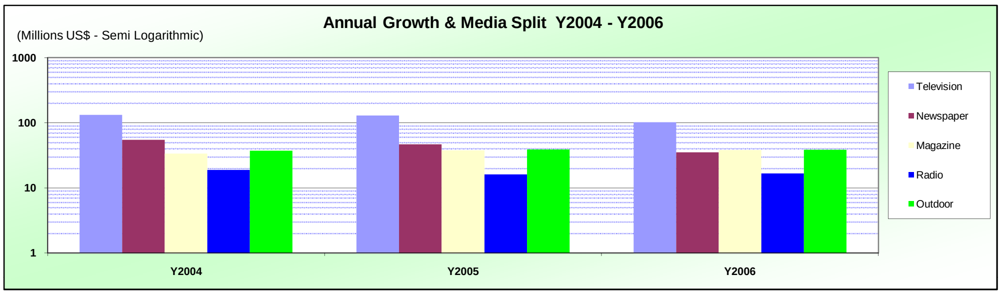
Monthly Spend Analysis (Millions US$)Y2004 - 2006


(Millions US$)

Period	Y2004	Y2005	Y2006	Var'n % Y06/05
Jan	17	19	19	5
Feb	19	18	17	-5
Mar	20	16	21	30
Apr	19	18	22	27
May	24	19	23	22
Jun	27	24	26	11
Jul	27	26	17	-35
Aug	23	24	7	-72
Sep	19	21	14	-32
Oct	26	32	23	-27
Nov	26	26	18	-32
Dec	28	28	22	-20
Total	**276**	**270**	**231**	**-14**

Overall Media Split Analysis (Millions US$)

Media	Y2004		Y2005		Y2006		Var'n %	Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2005/2006	Y06	Y05
Television	132	48	130	48	102	44	-22	77	98
Newspaper	55	20	47	17	35	15	-25	64	86
Magazine	34	12	38	14	38	17	1	114	113
Radio	19	7	16	6	17	7	4	88	85
Outdoor	37	13	39	14	39	17	0	104	105
Total	**276**	**100**	**270**	**100**	**231**	**100**	**-14**	**83**	**98**


Annual Growth & Media Split Y2004 - Y2006

(Millions US$ - Semi Logarithmic)

Top Brands Y2006 (000 US$)

Television Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Byblos	10989	4
2	Pepsi	6627	-11
3	Coca Cola	6530	8
4	Pantene	4867	-21
5	Nido	3918	35
6	Blom Bank	3885	18
7	Head & Shoulders	3789	-18
8	Smeds	3287	85
9	Herbal Essences	3185	17
10	Ariel	3180	-39
11	Persil	3012	78
12	Crest	2729	17

Newspapers Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Dubai Holding	908	197
2	Winston	685	-1
3	Bankmed	471	N
4	Mobili Top	352	-30
5	Banque Audi	325	61
6	Aishti	311	-32
7	Blom Bank	279	-40
8	Shell	262	71
9	Libano-francaise	237	E
10	Rolex	236	-39
11	Audi	236	10
12	Med Gulf	233	-17

Magazines Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Oris	407	E
2	Naharnet	292	-23
3	S.t.dupont	288	272
4	Fransa Bank	229	2
5	Blom Bank	227	24
6	Virgin Megastore	221	186
7	Patek Philippe	219	107
8	Libano-francaise	204	221
9	Chaumet	198	247
10	M.e.airlines	173	-54
11	L & M	173	N
12	Jammal Trust	164	39

Radio Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Aquarium	428	2
2	Al Tawil Roasted	414	N
3	Tropicana	245	N
4	Efes Extra	226	N
5	Fahed	225	-55
6	Al Amana	210	E
7	Dolly`s	206	N
8	Aishti	203	-47
9	Kyphi	203	208
10	United Courriers	200	52
11	Ways Group	200	N
12	Le Rodin	197	215

Outdoor Top Spenders

Rank	Brand	Y2006	%Var'n Y06/05
1	Aishti	1592	-13
2	Ciment Liban	1060	N
3	Winston	920	E
4	Kentucky	872	-6
5	Bhv	709	-24
6	Byblos	626	25
7	City Mall	593	57
8	Gandour	508	116
9	Halls	504	N
10	Daniela Tobler	489	170
11	Hardees	488	-32
12	Almaza	456	E

E - Exceeding the limit >300%   N - New

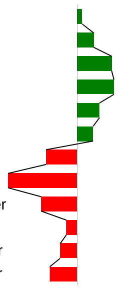
LEBANON - Y2006

Millions US$ 231 ▼ - 14%

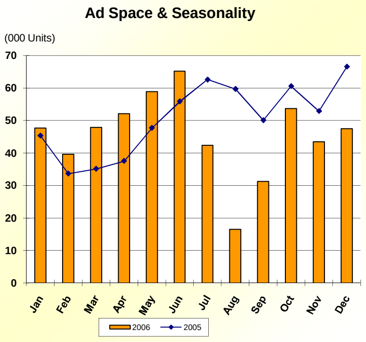
Thousand SESU 546 ▼ - 10%

ADVERTISING SPACE ALLOCATION AND POSITIONING

TOTAL MARKET ADVERTISING SPACE ALLOCATION



Period	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
	2006	2005	% Var'n	2006	% Var'n	2006	% Var'n	2006	% Var'n
January	47720	45334	5	648	-29	1915	7	16547	-6
February	39577	33672	18	748	-28	1592	1	13955	20
March	47925	35148	36	886	4	1834	49	19629	44
April	52079	37537	39	783	-5	2451	59	19273	44
May	58907	47746	23	932	9	1847	24	20435	38
June	65190	55912	17	1042	8	2274	10	21210	11
July	42361	62606	-32	785	-36	1832	4	9752	-63
August	16473	59722	-72	319	-70	718	-63	6390	-70
September	31309	50108	-38	747	-30	969	-9	10041	-48
October	53725	60568	-11	752	-42	1340	-36	21235	-29
November	43496	52883	-18	728	-31	1365	-41	11837	-48
December	47475	66579	-29	772	-34	2230	-19	14907	-36
	546237	**607813**	**-10**	**9143**	**-26**	**20368**	**-6**	**185210**	**-20**

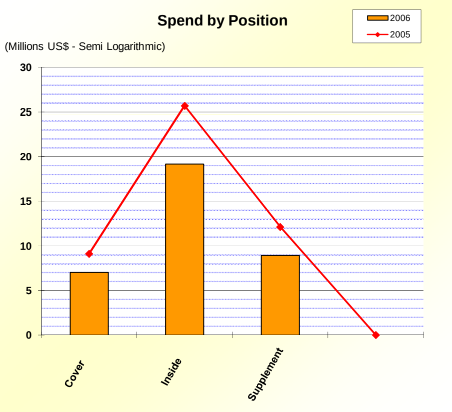

Ad Space & Seasonality

Definition of SESU
Newspaper - Half a Page **Magazine** - One page **Television, Cinema & Video** - 30 seconds **Radio** - 60 seconds **Outdoor** - 40 faces

* - All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

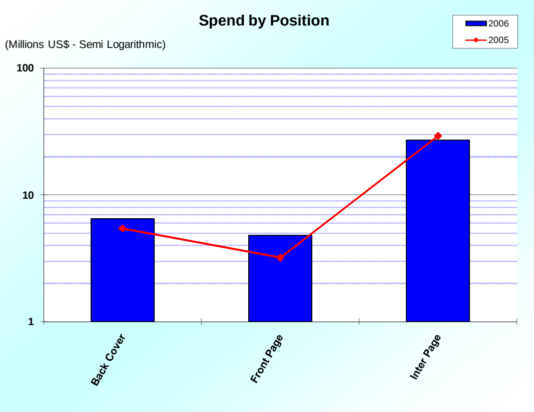
NEWSPAPERS

Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Cover	7	20	9	19	-23
Inside	19	55	26	55	-25
Supplement	9	25	12	26	-26
	35	**100**	**47**	**100**	**-25**


Spend by Position

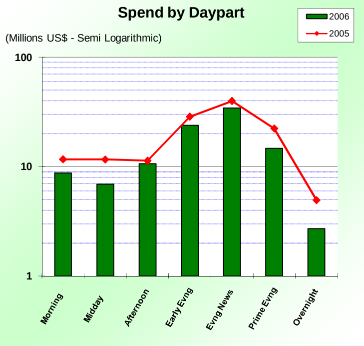
MAGAZINES

Spend by Position (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Back Cover	7	17	5	14	19
Front Page	5	13	3	8	50
Inter Page	27	70	29	77	-7
	38	**100**	**38**	**100**	**1**


Spend by Position

TELEVISION - KSA Time

Spend by Daypart (Millions US $)	2006		2005		Var'n %
	Value	%	Value	%	
Morning	9	9	12	9	-25
Midday	7	7	12	9	-40
Afternoon	11	10	11	9	-6
Early Evng	24	23	29	22	-17
Evng News	34	34	40	30	-14
Prime Evng	15	14	22	17	-34
Overnight	3	3	5	4	-45
	102	**100**	**130**	**100**	**-22**


Spend by Daypart

TOP 30 LEAGUE OF Y2006 (000 US$)

Rank & Brand	JANUARY - DECEMBER		2 YEAR		MEDIA SPLIT % - JAN - DEC 2006			
	2006	2005	TOTAL	AVG	TV	NP	MG	OT*
1 Byblos	11,906	11,273	23,179	11,589	92.30	1.71	0.58	5.41
2 Pepsi	6,957	7,675	14,632	7,316	95.26	0.00	0.00	4.74
3 Coca Cola	6,566	6,103	12,669	6,335	99.45	0.00	0.55	0.00
4 Pantene	5,044	6,629	11,673	5,836	96.49	0.00	2.12	1.38
5 Blom Bank	4,495	3,952	8,447	4,224	86.42	6.22	5.05	2.32
6 Nido	4,046	3,202	7,248	3,624	96.84	0.22	0.02	2.91
7 Head & Shoulders	3,850	4,830	8,680	4,340	98.42	0.00	1.59	0.00
8 Smeds	3,292	1,774	5,066	2,533	99.85	0.00	0.14	0.00
9 Herbal Essences	3,291	2,915	6,206	3,103	96.79	0.00	0.65	2.55
10 Aishti	3,266	4,834	8,100	4,050	31.83	9.53	3.69	54.97
11 Persil	3,226	1,773	4,999	2,499	93.36	0.00	0.00	6.63
12 Ariel	3,206	5,197	8,403	4,202	99.20	0.00	0.18	0.62
13 Crest	2,899	2,397	5,296	2,648	94.14	0.01	1.51	4.33
14 Banque Audi	2,763	4,643	7,406	3,703	74.01	11.76	4.69	9.53
15 Pampers	2,687	4,210	6,897	3,449	96.82	0.00	1.92	1.27
16 Tide	2,662	3,376	6,038	3,019	99.60	0.00	0.00	0.40
17 Loto Libanais	2,369	2,571	4,940	2,470	89.54	8.79	0.00	1.66
18 Always	2,314	5,289	7,603	3,802	99.96	0.00	0.04	0.00
19 Gma	2,264	3,843	6,107	3,054	99.78	0.00	0.00	0.22
20 Libano-francaise	2,255	108	2,363	1,181	68.02	10.51	9.04	12.41
21 Beirut Marathon	2,201	409	2,610	1,305	86.74	1.90	2.30	9.07
22 General Security	2,168	1,095	3,263	1,631	99.99	0.00	0.00	0.00
23 Higher Relief C.	2,054	0	2,054	1,027	99.99	0.00	0.00	0.00
24 Fairy	2,034	2,518	4,552	2,276	99.18	0.00	0.00	0.81
25 Loterie National	1,997	1,643	3,640	1,820	99.89	0.00	0.12	0.00
26 Sayeda..horra..m	1,912	128	2,040	1,020	100.00	0.00	0.00	0.00
27 La Youmal Show	1,896	2,064	3,960	1,980	98.02	0.00	0.00	1.99
28 Mirinda	1,895	1,480	3,375	1,688	98.01	0.00	0.00	1.99
29 Auxilia	1,891	1,811	3,702	1,851	98.62	1.38	0.03	0.00
30 Western Union	1,808	1,621	3,429	1,714	88.98	3.13	2.69	5.17

*OT=Radio+OutDoor+Cinema