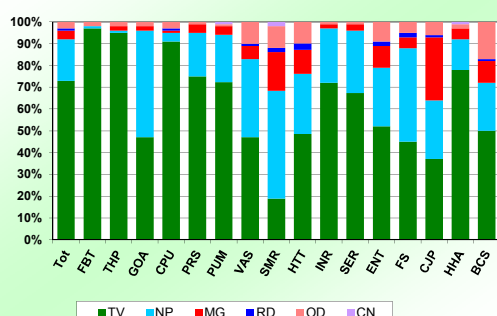
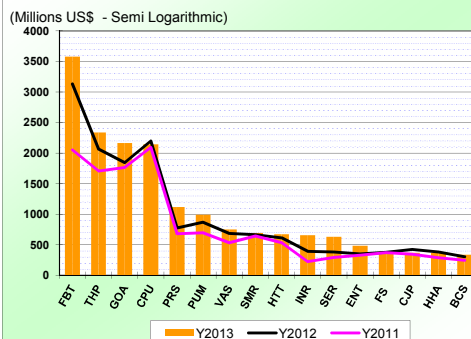


| Chapter                                 | Abbreviation | Y2011         | Y2012         | Y2013         | Sh%        | %Var'n<br>Y13/12 | Media Split % |           |          |          |          |          |
|-----------------------------------------|--------------|---------------|---------------|---------------|------------|------------------|---------------|-----------|----------|----------|----------|----------|
|                                         |              |               |               |               |            |                  | TV            | NP        | MG       | RD       | OD       | CN       |
| Food Beverages And Tobacco              | FBT          | 2,052         | 3,134         | 3,578         | 20         | 14               | 97            | 1         | 0        | 0        | 2        | 0        |
| Toiletries Hygiene/ House Care Products | THP          | 1,706         | 2,065         | 2,339         | 13         | 13               | 95            | 1         | 2        | 0        | 2        | 0        |
| Government/Corporate & Organization Ad  | GOA          | 1,765         | 1,843         | 2,164         | 12         | 17               | 47            | 49        | 2        | 0        | 2        | 0        |
| Communications & Public Utilities       | CPU          | 2,095         | 2,201         | 2,143         | 12         | -3               | 92            | 4         | 1        | 1        | 3        | 0        |
| Professional Services                   | PRS          | 680           | 772           | 1,118         | 6          | 45               | 75            | 20        | 4        | 0        | 1        | 0        |
| Publishing Media                        | PUM          | 694           | 870           | 992           | 6          | 14               | 73            | 22        | 4        | 0        | 1        | 1        |
| Vehicles Accessories & Supply           | VAS          | 536           | 684           | 752           | 4          | 10               | 47            | 36        | 6        | 1        | 10       | 0        |
| Shopping Malls & Retail Stores          | SMR          | 645           | 665           | 692           | 4          | 4                | 19            | 50        | 18       | 2        | 10       | 2        |
| Hotel Travel & Tourism                  | HTT          | 536           | 614           | 672           | 4          | 9                | 49            | 28        | 11       | 3        | 10       | 0        |
| Insurance & Real Estate & Properties    | INR          | 224           | 393           | 655           | 4          | 67               | 72            | 25        | 2        | 0        | 1        | 0        |
| Other Services                          | SER          | 293           | 382           | 629           | 4          | 65               | 68            | 29        | 3        | 0        | 1        | 0        |
| Entertainment                           | ENT          | 330           | 349           | 484           | 3          | 39               | 52            | 27        | 10       | 2        | 9        | 0        |
| Financial Services                      | FS           | 373           | 374           | 391           | 2          | 5                | 45            | 43        | 5        | 2        | 5        | 0        |
| Clothing Jewellery & Personal Accs      | CJP          | 345           | 422           | 369           | 2          | -13              | 37            | 27        | 29       | 1        | 6        | 0        |
| Household Appliances                    | HHA          | 288           | 383           | 367           | 2          | -4               | 78            | 14        | 5        | 0        | 2        | 1        |
| Business/Construct Equip. & Supply      | BCS          | 248           | 302           | 335           | 2          | 11               | 50            | 22        | 10       | 1        | 17       | 0        |
| <b>Total</b>                            |              | <b>12,809</b> | <b>15,453</b> | <b>17,688</b> | <b>100</b> | <b>14</b>        | <b>73</b>     | <b>19</b> | <b>4</b> | <b>1</b> | <b>3</b> | <b>0</b> |

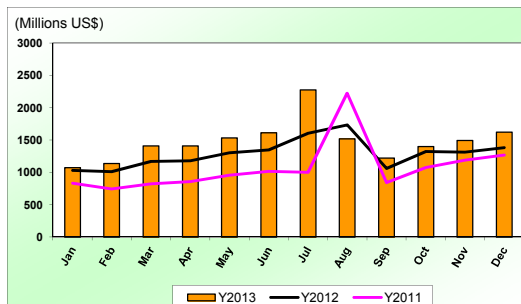
Y2013 Media Split %



Annual Growth Y2011 - Y2013



## Monthly Spend Analysis (Millions US\$) Y2011 - 2013



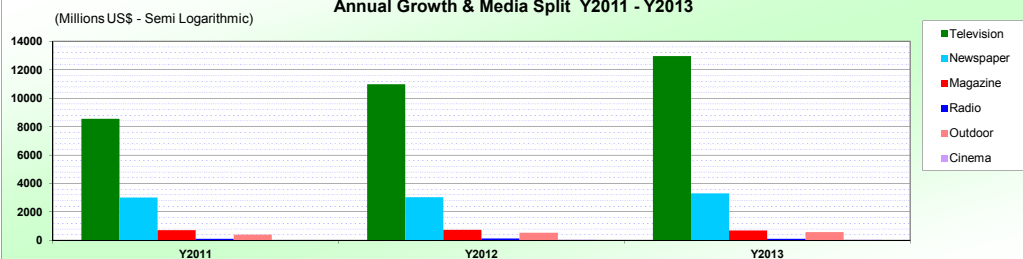
| Period       | Y2011        | Y2012        | Y2013        | Var'n %<br>Y13/12 |
|--------------|--------------|--------------|--------------|-------------------|
| Jan          | 831          | 1027         | 1071         | 4                 |
| Feb          | 744          | 1012         | 1138         | 12                |
| Mar          | 822          | 1170         | 1408         | 20                |
| Apr          | 854          | 1180         | 1407         | 19                |
| May          | 954          | 1302         | 1532         | 18                |
| Jun          | 1013         | 1348         | 1609         | 19                |
| Jul          | 1001         | 1603         | 2275         | 42                |
| Aug          | 2221         | 1734         | 1518         | -12               |
| Sep          | 841          | 1058         | 1221         | 15                |
| Oct          | 1075         | 1322         | 1398         | 6                 |
| Nov          | 1188         | 1314         | 1493         | 14                |
| Dec          | 1265         | 1383         | 1619         | 17                |
| <b>Total</b> | <b>12809</b> | <b>15453</b> | <b>17688</b> | <b>14</b>         |

## Overall Media Split Analysis (Millions US\$)

| Media        | Y2011         |            | Y2012         |            | Y2013         |            | Var'n %    |            | Growth Index* |  |
|--------------|---------------|------------|---------------|------------|---------------|------------|------------|------------|---------------|--|
|              | Value         | Sh%        | Value         | Sh%        | Value         | Sh%        | Y2012/2013 | Y13        | Y12           |  |
| Television   | 8,552         | 67         | 10,979        | 71         | 12,948        | 73         | 18         | 151        | 128           |  |
| Newspaper    | 3,005         | 23         | 3,037         | 20         | 3,306         | 19         | 9          | 110        | 101           |  |
| Magazine     | 716           | 6          | 732           | 5          | 690           | 4          | -6         | 96         | 102           |  |
| Radio        | 110           | 1          | 135           | 1          | 105           | 1          | -22        | 96         | 122           |  |
| Outdoor      | 406           | 3          | 538           | 3          | 587           | 3          | 9          | 145        | 133           |  |
| Cinema       | 19            | 0          | 32            | 0          | 45            | 0          | 44         | 237        | 165           |  |
| <b>Total</b> | <b>12,809</b> | <b>100</b> | <b>15,453</b> | <b>100</b> | <b>17,681</b> | <b>100</b> | <b>14</b>  | <b>138</b> | <b>121</b>    |  |

\*Index base Y2011

Annual Growth &amp; Media Split Y2011 - Y2013



## Top Brands Y2013 (000 US\$)

## Television Top Spenders

| Rank | Brand          | Y2013   | %Var'n<br>Y13/12 |
|------|----------------|---------|------------------|
| 1    | Honest         | 293,501 | 152              |
| 2    | Coca Cola      | 248,289 | 49               |
| 3    | Pepsi          | 240,323 | -9               |
| 4    | 57357 Hospital | 204,844 | 188              |
| 5    | Chipsy         | 137,082 | 36               |
| 6    | Dettol         | 122,472 | 32               |
| 7    | Vodafone       | 114,437 | -3               |
| 8    | Mirinda        | 104,789 | 64               |
| 9    | Mobily         | 100,615 | -11              |
| 10   | Galaxy         | 97,672  | 8                |
| 11   | Etisalat Egypt | 96,368  | -15              |
| 12   | Sedar          | 96,099  | -3               |

## Newspapers Top Spenders

| Rank | Brand          | Y2013  | %Var'n<br>Y13/12 |
|------|----------------|--------|------------------|
| 1    | Toyota         | 23,746 | -8               |
| 2    | Ford           | 22,031 | 31               |
| 3    | Samsung        | 21,431 | 21               |
| 4    | Nissan         | 14,704 | 39               |
| 5    | Emaar          | 14,682 | E                |
| 6    | Chevrolet      | 14,600 | 8                |
| 7    | Mcdonald's     | 14,311 | 20               |
| 8    | Carrefour      | 13,253 | -2               |
| 9    | Zain Tel.comm. | 11,252 | -11              |
| 10   | Lulu           | 11,120 | -10              |
| 11   | Hyundai        | 10,348 | 27               |
| 12   | Honda          | 9,982  | 44               |

## Magazines Top Spenders

| Rank | Brand             | Y2013 | %Var'n<br>Y13/12 |
|------|-------------------|-------|------------------|
| 1    | Rolex             | 6,045 | -12              |
| 2    | Christian Dior    | 5,372 | 15               |
| 3    | Cartier           | 5,053 | -11              |
| 4    | Chanel            | 4,586 | 4                |
| 5    | Samsung           | 3,613 | 10               |
| 6    | Patek Philippe    | 3,435 | 5                |
| 7    | Damas Watch_jewlr | 3,184 | 4                |
| 8    | B.m.w.            | 2,952 | 35               |
| 9    | Bvlgari           | 2,828 | -14              |
| 10   | Chopard           | 2,813 | 3                |
| 11   | Omega             | 2,746 | -2               |
| 12   | Louis Vuitton     | 2,723 | 16               |

## Radio Top Spenders

| Rank | Brand             | Y2013 | %Var'n<br>Y13/12 |
|------|-------------------|-------|------------------|
| 1    | Saudi Telecomm.   | 3,489 | -51              |
| 2    | Jarir Bookstore   | 2,175 | -27              |
| 3    | Mobily            | 1,560 | -52              |
| 4    | Zain Tel.comm.    | 1,349 | -41              |
| 5    | Sedar             | 1,130 | -23              |
| 6    | Emirates Airlines | 1,075 | 15               |
| 7    | Al Salam Bank     | 990   | 96               |
| 8    | Etihad            | 825   | 98               |
| 9    | Samsung           | 655   | 13               |
| 10   | Du                | 635   | -25              |
| 11   | Mcdonald's        | 630   | -32              |
| 12   | Red Bull          | 558   | 60               |

## Outdoor Top Spenders

| Rank | Brand            | Y2013  | %Var'n<br>Y13/12 |
|------|------------------|--------|------------------|
| 1    | Samsung          | 37,548 | 89               |
| 2    | Dubai Shop.fest. | 19,494 | 23               |
| 3    | Zain Tel.comm.   | 16,103 | 68               |
| 4    | Saudi Telecomm.  | 15,862 | 119              |
| 5    | Toyota           | 15,459 | -17              |
| 6    | Ford             | 15,377 | 16               |
| 7    | Mobily           | 15,096 | -40              |
| 8    | Mcdonald's       | 13,537 | -10              |
| 9    | Kfc              | 10,036 | 11               |
| 10   | Etisalat         | 9,626  | 268              |
| 11   | Du               | 7,510  | -9               |
| 12   | Pizza Hut        | 6,297  | -36              |

E - Exceeding the limit &gt;300% N - New