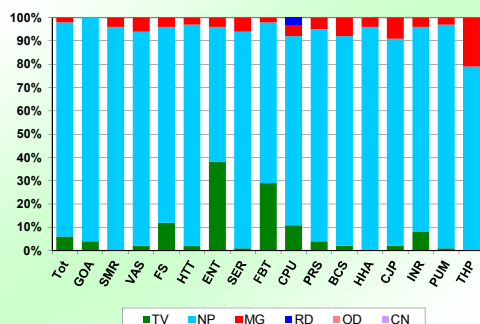
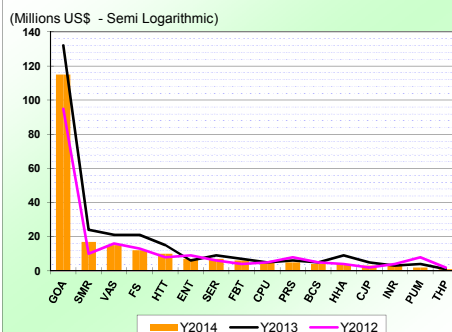


| Chapter                                 | Abbreviation | Y2012      | Y2013      | Y2014      | Sh%        | %Var'n<br>Y14/13 | Media Split % |           |          |          |          |          |
|-----------------------------------------|--------------|------------|------------|------------|------------|------------------|---------------|-----------|----------|----------|----------|----------|
|                                         |              |            |            |            |            |                  | TV            | NP        | MG       | RD       | OD       | CN       |
| Government/Corporate & Organization Ad  | GOA          | 95         | 132        | 115        | 54         | -13              | 4             | 95        | 0        | 0        | 0        | 0        |
| Shopping Malls & Retail Stores          | SMR          | 10         | 24         | 17         | 8          | -29              | 2             | 96        | 4        | 0        | 0        | 0        |
| Vehicles Accessories & Supply           | VAS          | 16         | 21         | 15         | 7          | -29              | 2             | 92        | 6        | 0        | 0        | 0        |
| Financial Services                      | FS           | 13         | 21         | 12         | 6          | -43              | 12            | 84        | 4        | 0        | 0        | 0        |
| Hotel Travel & Tourism                  | HTT          | 8          | 15         | 10         | 5          | -33              | 2             | 96        | 3        | 0        | 0        | 0        |
| Entertainment                           | ENT          | 9          | 6          | 7          | 3          | 17               | 38            | 58        | 4        | 0        | 0        | 0        |
| Other Services                          | SER          | 6          | 9          | 7          | 3          | -22              | 1             | 93        | 6        | 0        | 0        | 0        |
| Food Beverages And Tobacco              | FBT          | 4          | 7          | 6          | 3          | -14              | 29            | 69        | 2        | 0        | 0        | 0        |
| Communications & Public Utilities       | CPU          | 5          | 5          | 5          | 2          | 0                | 11            | 82        | 5        | 3        | 0        | 0        |
| Professional Services                   | PRS          | 8          | 6          | 5          | 2          | -17              | 4             | 92        | 5        | 0        | 0        | 0        |
| Business/Construct Equip. & Supply      | BCS          | 5          | 5          | 4          | 2          | -20              | 2             | 90        | 8        | 0        | 0        | 0        |
| Household Appliances                    | HHA          | 4          | 9          | 4          | 2          | -56              | 0             | 97        | 4        | 0        | 0        | 0        |
| Clothing Jewellery & Personal Acs       | CJP          | 2          | 5          | 3          | 1          | -40              | 2             | 89        | 9        | 0        | 0        | 0        |
| Insurance & Real Estate & Properties    | INR          | 4          | 3          | 3          | 1          | 0                | 8             | 89        | 4        | 0        | 0        | 0        |
| Publishing Media                        | PUM          | 8          | 4          | 2          | 1          | -50              | 1             | 96        | 3        | 0        | 0        | 0        |
| Toiletries Hygiene/ House Care Products | THP          | 2          | 1          | 1          | 0          | 0                | 79            | 21        | 0        | 0        | 0        | 0        |
| <b>Total</b>                            |              | <b>199</b> | <b>273</b> | <b>213</b> | <b>101</b> | <b>-22</b>       | <b>6</b>      | <b>92</b> | <b>2</b> | <b>0</b> | <b>0</b> | <b>0</b> |

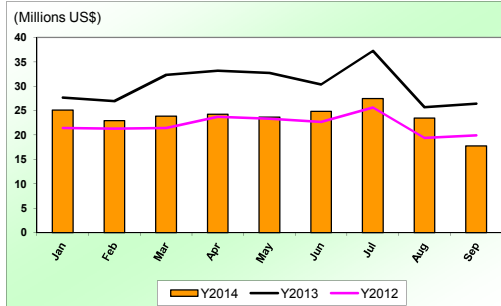
Y2014 Media Split %



Annual Growth Y2012 - Y2014



## Monthly Spend Analysis (Millions US\$)Y2012 - 2014



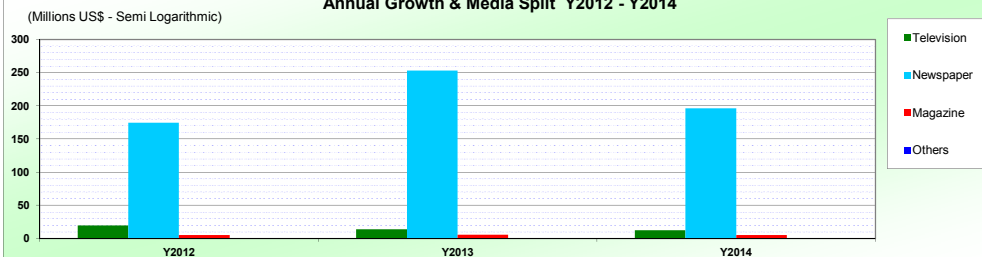
| Period       | Y2012      | Y2013      | Y2014      | Var'n %<br>Y14/13 |
|--------------|------------|------------|------------|-------------------|
| Jan          | 21         | 28         | 25         | -9                |
| Feb          | 21         | 27         | 23         | -15               |
| Mar          | 21         | 32         | 24         | -26               |
| Apr          | 24         | 33         | 24         | -27               |
| May          | 23         | 33         | 24         | -28               |
| Jun          | 23         | 30         | 25         | -18               |
| Jul          | 26         | 37         | 27         | -26               |
| Aug          | 19         | 26         | 23         | -9                |
| Sep          | 20         | 26         | 18         | -33               |
| <b>Total</b> | <b>199</b> | <b>273</b> | <b>213</b> | <b>-22</b>        |

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

| Media        | Y2012      |            | Y2013      |            | Y2014      |            | Var'n %<br>Y2013/2014 | Growth Index* |            |
|--------------|------------|------------|------------|------------|------------|------------|-----------------------|---------------|------------|
|              | Value      | Sh%        | Value      | Sh%        | Value      | Sh%        |                       | Y14           | Y13        |
| Television   | 20         | 10         | 14         | 5          | 12         | 6          | -12                   | 63            | 72         |
| Newspaper    | 174        | 88         | 253        | 93         | 196        | 92         | -23                   | 112           | 145        |
| Magazine     | 5          | 2          | 5          | 2          | 5          | 2          | -10                   | 100           | 110        |
| Others       | 0          | 0          | 0          | 0          | 0          | 0          | 5                     | 73            | 70         |
| <b>Total</b> | <b>199</b> | <b>100</b> | <b>273</b> | <b>100</b> | <b>213</b> | <b>100</b> | <b>-22</b>            | <b>107</b>    | <b>137</b> |

\*Index base Y2012

Annual Growth &amp; Media Split Y2012 - Y2014



## Top Brands Y2014 (000 US\$)

## Television Top Spenders

| Rank | Brand             | Y2014 | %Var'n<br>Y14/13 |
|------|-------------------|-------|------------------|
| 1    | Consumer Protect  | 1349  | -62              |
| 2    | A'saffa           | 1240  | N                |
| 3    | Salalah Toursm F  | 1009  | 173              |
| 4    | Public A.sme Dev. | 863   | 258              |
| 5    | Sultan Qaboos Awa | 681   | N                |
| 6    | Muscat Festival   | 574   | 13               |
| 7    | Gallops Of Oman   | 456   | N                |
| 8    | Tour Of Oman      | 357   | E                |
| 9    | Muscat Call Cente | 271   | 30               |
| 10   | Bank Nizwa        | 222   | E                |
| 11   | Public Auth.e.w   | 215   | N                |
| 12   | Orpic             | 196   | 5                |
| 13   | Ministry Of Worke | 173   | 115              |
| 14   | Nawras Telecom    | 171   | E                |
| 15   | Omantel           | 157   | 4                |

## Newspapers Top Spenders

| Rank | Brand            | Y2014 | %Var'n<br>Y14/13 |
|------|------------------|-------|------------------|
| 1    | Omantel          | 2496  | -14              |
| 2    | Bank Muscat      | 2446  | -63              |
| 3    | Lulu             | 1976  | -8               |
| 4    | Royal Opera Hous | 1909  | 18               |
| 5    | Mcdonald's       | 1425  | -66              |
| 6    | Muscat Electrn.  | 1392  | -67              |
| 7    | Namam Sohar      | 1348  | -34              |
| 8    | Nissan           | 1280  | -44              |
| 9    | Toyota           | 1165  | -31              |
| 10   | Oman Arab Bank   | 972   | 23               |
| 11   | Golden Family B  | 961   | -38              |
| 12   | Mughlai Zaika    | 943   | -50              |
| 13   | Oasis            | 853   | -22              |
| 14   | Al Maha Ceramics | 844   | -33              |
| 15   | Bank Sohar       | 840   | -23              |

## Magazines Top Spenders

| Rank | Brand          | Y2014 | %Var'n<br>Y14/13 |
|------|----------------|-------|------------------|
| 1    | Omantel        | 127   | 3                |
| 2    | Jotun          | 127   | 20               |
| 3    | Sadolin        | 112   | -3               |
| 4    | Mitsubishi     | 99    | 78               |
| 5    | Nissan         | 98    | -8               |
| 6    | Bank Muscat    | 90    | -9               |
| 7    | Nawras Telecom | 78    | -65              |
| 8    | Honda          | 76    | 122              |
| 9    | Panasonic      | 74    | -7               |
| 10   | Al Ahli Bank   | 68    | 48               |
| 11   | Hsbc           | 63    | 49               |
| 12   | Emc            | 59    | 44               |
| 13   | Audi           | 56    | E                |
| 14   | Gallery Argan  | 55    | 62               |
| 15   | Malabar        | 54    | 156              |

## Outdoor Top Spenders

| Rank | Brand | Y2014 | %Var'n<br>Y14/13 |
|------|-------|-------|------------------|
|------|-------|-------|------------------|