



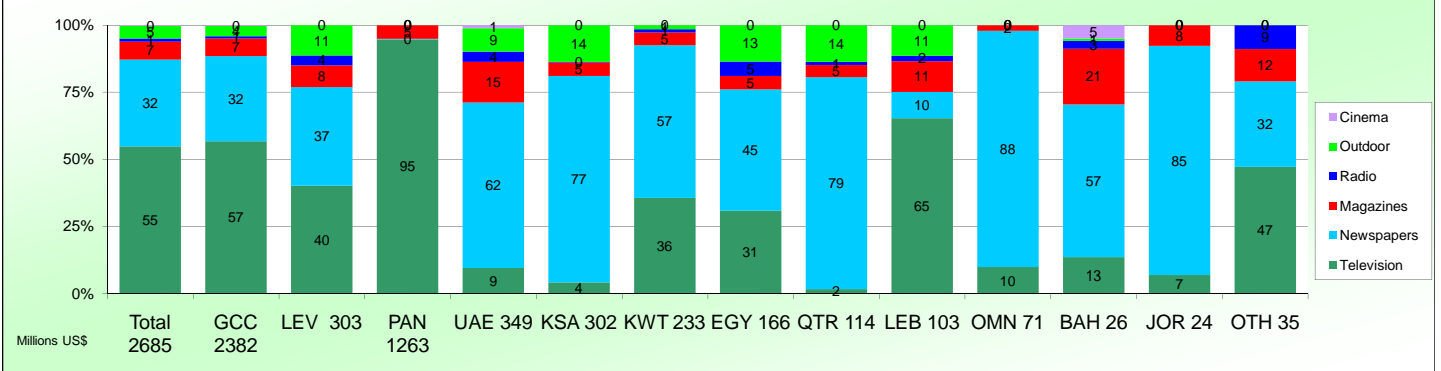
ADVERTISING MARKETS Y2011 [Jan-Mar]

Millions US\$ 2,685 ▼ -1%

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

Rank	Market Name & Abbreviation	Y2009	Y2010	Y2011	%Var'n Y11/10	Media Contribution (US \$ Million)											
						Television	Newspapers	Magazines	Radio	Outdoor	Cinema						
1	Pan Arab Media PAN	899	1,183	1,263	7	1,196	3	64	0	0	0						
2	United Arab Emirates UAE	356	339	349	3	33	216	53	13	30	4						
3	Kindom Of Saudi Arabia KSA	271	271	302	11	12	232	15	1	41	0						
4	Kuwait KWT	189	229	233	1	83	133	11	3	3	0						
5	Egypt EGY	234	340	166	-51	51	75	8	9	22	0						
6	Qatar QTR	95	107	114	7	2	90	5	1	16	0						
7	Lebanon LEB	77	96	103	7	67	10	12	2	12	0						
8	Oman OMN	61	62	71	14	7	62	1	0	0	0						
9	Bahrain BAH	22	33	26	-21	3	15	5	1	0	1						
10	Jordan JOR	26	31	24	-21	2	21	2	0	0	0						
11	Other Markets** OTH	34	34	35	3	17	11	4	3	0	0						
Total AGCC & Pan Arab		GCC	1,917	2,245	2,382	6	1,351	757	156	22	91	5					
Total Levant Markets		LEV	347	479	303	-37	122	111	25	11	34	0					
Total All Markets		M\$	2,264	2,724	2,685	-1	1,473	868	181	33	125	5					
Markets Growth Index (Base Y2009)			Y2009	2,264	100	1,055	100	853	100	175	100	31	100	144	100	5	100
			Y2010	2,724	120	1,477	140	910	107	171	98	34	107	128	89	4	89
			Y2011	2,685	119	1,473	140	868	102	181	103	33	105	125	87	5	107

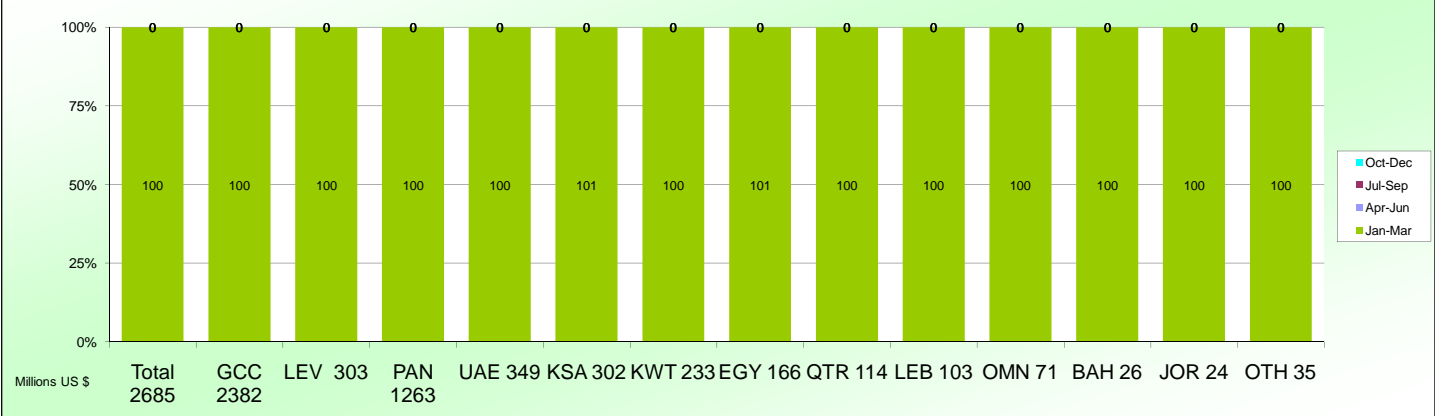
Ranking of Markets & Media Split



2 - Markets Adspend by Quarter Y2011 (US \$ Millions)

Rank	Market Name	Abbreviation	Y2011		JAN - MAR		
			Value	Sh%	Value	Sh%	
1	Pan Arab Media	PAN	1,263	47	1263	100	
2	United Arab Emirates	UAE	349	13	349	100	
3	Kindom Of Saudi Arabia	KSA	302	11	304	101	
4	Kuwait	KWT	233	9	233	100	
5	Egypt	EGY	166	6	168	101	
6	Qatar	QTR	114	4	114	100	
7	Lebanon	LEB	103	4	103	100	
8	Oman	OMN	71	3	71	100	
9	Bahrain	BAH	26	1	26	100	
10	Jordan	JOR	24	1	24	100	
11	Other Markets**	OTH	35	1	35	100	
Total AGCC & Pan Arab		GCC	2,382	89	2,385	100	
Total Levant Markets		LEV	303	11	304	100	
Total All Markets		M\$	2,685	100	2,689	100	
Markets Growth Index (Base Y2009)			Y2009	2,264	100	2,267	100
			Y2010	2,724	120	2,726	120
			Y2011	2,685	119	2,689	119

Ranked Markets Ad Spend & Quarterly Split



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

AGCC, LEVANT*, PAN ARAB & ARASIAN MEDIA MARKET [Jan-Mar]

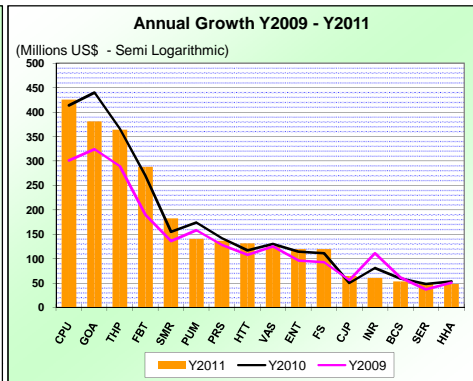
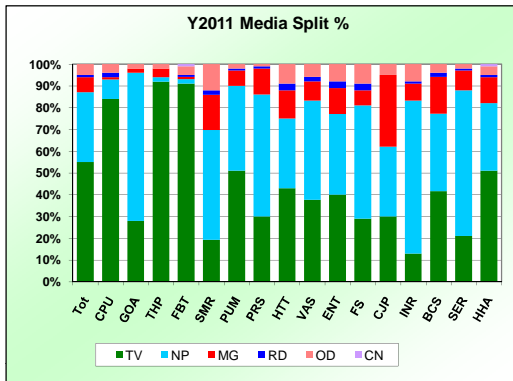
Millions US\$ 2685 ▼ - 1%

Chapter	Abbreviation	Y2009	Y2010	Y2011	Sh%	%Var'n	Media Split %					
							TV	NP	MG	RD	OD	CN
Communications & Public Utilities	CPU	301	414	425	16	3	84	9	1	2	4	0
Government/Organization Advertising	GOA	324	440	381	14	-13	28	68	2	0	2	0
Toiletries Hygiene/ House Care Products	THP	289	366	364	14	-1	91	2	4	0	2	0
Food Beverages And Tobacco	FBT	190	270	288	11	7	92	2	1	1	4	1
Shopping Malls & Retail Stores	SMR	136	155	182	7	17	19	50	16	2	12	0
Publishing Media	PUM	158	174	140	5	-20	51	39	7	1	2	0
Professional Services	PRS	128	142	136	5	-4	30	56	12	1	1	0
Hotel, Travel & Tourism	HTT	108	117	131	5	12	43	32	13	3	9	0
Vehicles, Accessories & Supply	VAS	125	130	125	5	-4	38	46	9	2	6	0
Entertainment	ENT	96	114	119	4	4	40	37	12	3	8	0
Financial Services	FS	93	111	119	4	7	29	52	7	3	9	0
Clothing, Jewellery & Personal Accs	CJP	56	50	64	2	28	30	32	33	0	5	0
Insurance & Real Estate & Properties	INR	111	81	60	2	-26	13	71	8	1	8	0
Business/Construct Equip. & Supply	BCS	61	59	53	2	-10	42	36	17	2	4	0
Other Services	SER	37	48	50	2	4	21	67	9	1	2	0
Household Appliances	HHA	51	53	48	2	-9	51	31	12	1	4	1
Total		2,264	2,724	2,685	100	-1	55	32	7	1	5	0

Top Brands Y2011 (000 US\$)

Television Top Spenders

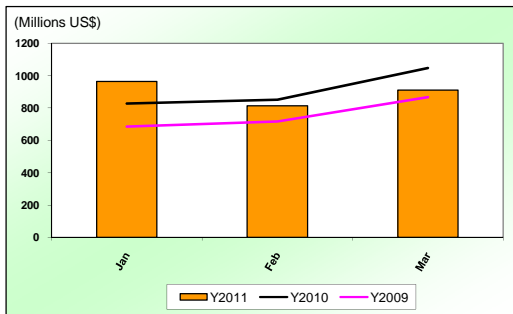
Rank	Brand	Y2011	%Var'n
1	Zain	25,403	10
2	Head & Shoulders	20,203	17
3	Pepsi	18,406	16
4	Dabur	17,419	-5
5	Pampers	16,341	80
6	Dettol	14,861	22
7	Coca Cola	14,024	6
8	Mobc	12,744	-4
9	Lipton	12,270	-15
10	Dove	12,220	-10
11	Galaxy	12,041	42
12	Kia	11,396	E



Newspapers Top Spenders

Rank	Brand	Y2011	%Var'n
1	Toyota	6,170	6
2	Zain	6,027	52
3	Stc	4,302	-25
4	Ford	3,663	19
5	Samsung	3,588	-9
6	Nissan	3,319	-38
7	Carrefour	3,295	18
8	Chevrolet	3,058	-43
9	Kia	2,855	-9
10	Nat'l B.egypt	2,735	-14
11	Vodafone	2,612	-6
12	Sony	2,565	-8

Monthly Spend Analysis (Millions US\$) Y2009 - 2011



Period	Y2009	Y2010	Y2011	Var'n %
Jan	684	827	964	17
Feb	716	851	814	-4
Mar	866	1048	912	-13
Total	2264	2724	2685	-1

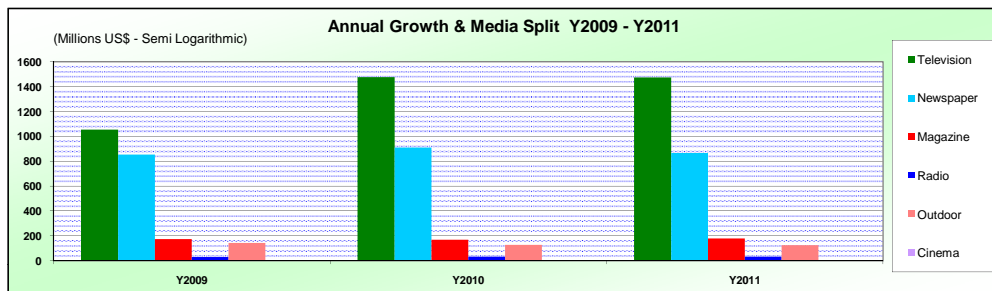
Magazines Top Spenders

Rank	Brand	Y2011	%Var'n
1	Pantene	1,295	295
2	Rolex	1,233	17
3	Audi	1,031	6
4	Mercedes	1,022	112
5	Cartier	970	159
6	Braun	906	54
7	Chanel	862	-25
8	Home Center	828	-32
9	Dior	773	9
10	Max Factor	678	-10
11	Du	656	9
12	Toyota	645	54

Overall Media Split Analysis (Millions US\$)

Media	Y2009		Y2010		Y2011		Var'n %		Growth Index*	
	Value	Sh%	Value	Sh%	Value	Sh%	Y2010/2011	Y11	Y10	
Television	1,055	47	1,477	54	1473	55	0	140	140	
Newspaper	853	38	910	33	868	32	-5	102	107	
Magazine	175	8	171	6	181	7	6	103	98	
Radio	31	1	34	1	33	1	-2	105	107	
Outdoor	144	6	128	5	125	5	-2	87	89	
Cinema	5	0	4	0	5	0	19	107	89	
Total	2,264	100	2,724	100	2,685	100	-1	119	120	

*Index base Y2009



Radio Top Spenders

Rank	Brand	Y2011	%Var'n
1	Etisalat Egypt	682	180
2	Mobinil	619	-21
3	Coca Cola	406	97
4	Vodafone	370	-64
5	Watanliya Telecom	362	65
6	Pepsi	358	-39
7	Bahrain Saudi B.	330	N
8	Etisalat	303	-58
9	Mcdonald's	285	33
10	Nokia	267	E
11	Stc	267	-14
12	Afc Asian Cup Q.	252	N

Outdoor Top Spenders

Rank	Brand	Y2011	%Var'n
1	Jarir Bookstore	12,871	E
2	Q-tel	3,747	-31
3	Zain	3,381	24
4	Etisalat	2,878	E
5	Qatar Motorshow	2,871	N
6	Sabb	2,479	E
7	Kentucky	2,359	4
8	Mobily	1,943	-25
9	Afc Asian Cup Q.	1,906	N
10	Chevrolet	1,897	E
11	Mcdonald's	1,886	-27
12	Hardees	1,750	95

E - Exceeding the limit >300% N - New

Millions US\$ 2685 ▼ - 1%

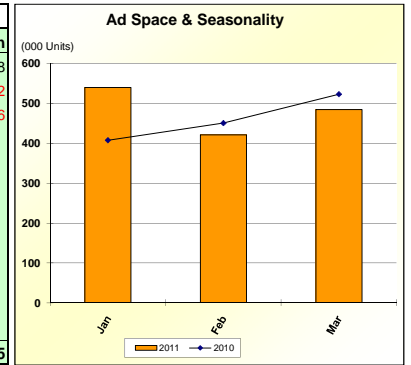
Thousand SESU 1447 ▲ + 5%

TOTAL MARKET ADVERTISING SPACE ALLOCATION

Y2011/2010Var %

Period	2011	2010	% Var'n
January	540597	408019	32
February	421897	450817	-6
March	484911	523134	-7

	ALL MEDIA (SESU Units)*			NEWSPAPERS (Pages)		MAGAZINES (Pages)		TELEVISION (Min)	
	2011	2010	% Var'n	2011	% Var'n	2011	% Var'n	2011	% Var'n
January	540597	408019	32	50047	1	14008	-1	387413	38
February	421897	450817	-6	49766	-1	14989	-2	272170	-12
March	484911	523134	-7	51175	-9	15657	-14	348962	-6
Total	1447406	1381970	5	150987	-3	44653	-6	1008545	5

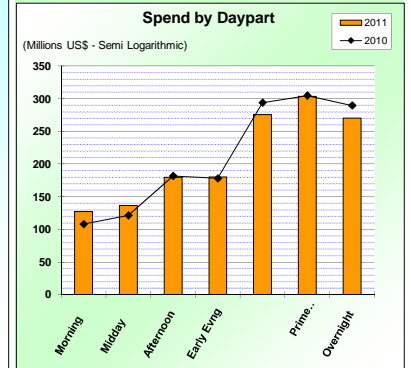
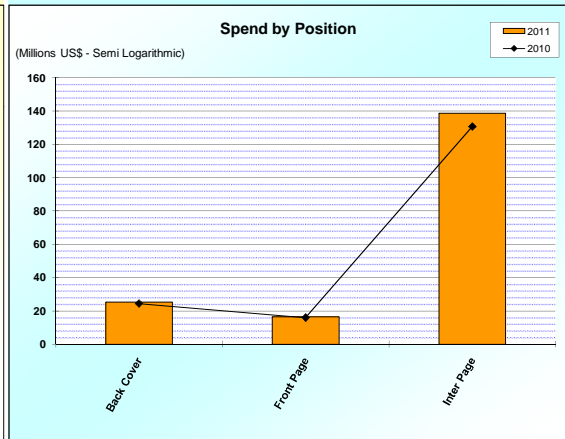
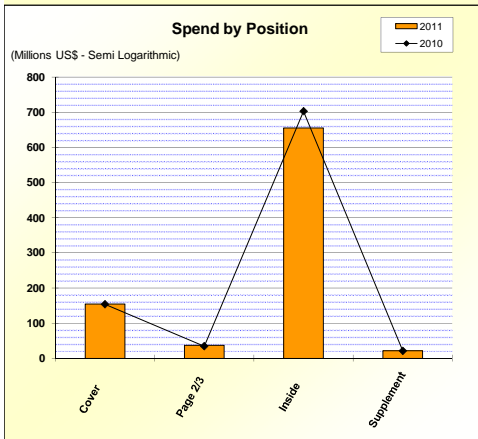


Definition of SESU * Outdoor Electronics as 15pc x 30" average 15" per ad
 Newspaper - Half a Page Magazine - One page Television, Cinema & Video - 30 seconds Radio - 60 seconds Outdoor - 40 faces * All Media - Newspapers, Magazines, Television, Radio, Outdoor & Cinema

Spend by Position (Millions US \$)	2011		2010		Var'n %
	Value	%	Value	%	
Cover	155	18	154	17	1
Page 2/3	37	4	34	4	8
Inside	655	76	702	77	-7
Supplement	22	3	21	2	2
Total	868	100	910	100	-5

Spend by Position (Millions US \$)	2011		2010		Var'n %
	Value	%	Value	%	
Back Cover	25	14	24	14	3
Front Page	17	9	16	9	4
Inter Page	139	77	131	77	6
Total	181	100	171	100	6

Spend by Daypart (Millions US \$)	2011		2010		Var'n %
	Value	%	Value	%	
Morning	127	9	108	7	18
Midday	137	9	121	8	13
Afternoon	180	12	182	12	-1
Early Evng	180	12	178	12	1
Evng News	276	19	294	20	-6
Prime Evng	304	21	305	21	0
Overnight	270	18	290	20	-7
Total	1473	100	1477	100	0



TOP 30 LEAGUE OF Y2011 (000 US\$)

Rank & Brand	JANUARY - MARCH		2 YEARS		MEDIA SPLIT % - JAN - MAR 2011			
	2011	2010	TOTAL	AVG	TV	NP	MG	OT*
1 Zain	35,342	30,359	65,701	32,851	71.88	17.05	0.94	10.13
2 Head & Shoulders	20,583	17,471	38,054	19,027	98.15	0.01	0.13	1.71
3 Pepsi	20,329	19,145	39,474	19,737	90.54	0.90	0.04	8.52
4 Dabur	17,436	18,420	35,856	17,928	99.90	0.00	0.10	0.00
5 Pampers	16,668	9,696	26,364	13,182	98.04	0.00	1.88	0.08
6 Coca Cola	15,817	14,939	30,756	15,378	88.66	0.49	0.08	10.77
7 Dettol	14,863	12,233	27,096	13,548	99.99	0.00	0.01	0.00
8 Kia	14,843	3,982	18,825	9,413	76.78	19.23	1.72	2.26
9 Jarir Bookstore	14,726	2,826	17,552	8,776	1.88	10.48	0.12	87.52
10 Mobily	14,609	13,315	27,924	13,962	70.41	15.72	0.54	13.33
11 Stc	14,232	25,178	39,410	19,705	63.27	30.23	0.69	5.81
12 Mobic	12,946	13,319	26,265	13,133	98.44	1.32	0.24	0.00
13 Pantene	12,665	14,611	27,276	13,638	88.35	0.27	10.23	1.15
14 Lipton	12,389	14,714	27,103	13,552	99.04	0.21	0.12	0.63
15 Dove	12,275	13,558	25,833	12,917	99.55	0.01	0.25	0.19
16 Mcdonald's	12,253	13,223	25,476	12,738	63.62	15.91	1.31	19.16
17 Galaxy	12,224	9,048	21,272	10,636	98.50	0.02	0.00	1.48
18 Kentucky	12,054	8,333	20,387	10,194	69.82	9.45	0.12	20.61
19 Toyota	12,006	10,599	22,605	11,303	34.91	51.39	5.37	8.33
20 Al Marai	11,498	15,529	27,027	13,514	95.08	3.99	0.02	0.91
21 Chevrolet	10,867	15,743	26,610	13,305	51.31	28.14	2.98	17.57
22 Anti Terrorism C	10,547	5,531	16,078	8,039	96.71	1.52	0.09	1.69
23 Nissan	10,331	8,036	18,367	9,184	49.74	32.13	4.29	13.84
24 Vodafone	10,068	16,324	26,392	13,196	58.88	25.94	2.67	12.50
25 Gillette	9,979	8,686	18,665	9,333	97.37	0.00	2.34	0.28
26 Du	9,943	12,407	22,350	11,175	55.04	21.87	6.60	16.48
27 Freez	9,641	5,146	14,787	7,394	100.00	0.00	0.00	0.00
28 Clear	9,395	11,992	21,387	10,694	99.43	0.57	0.00	0.00
29 Tide	9,109	4,230	13,339	6,670	99.36	0.49	0.14	0.00
30 Q-tel	9,084	8,321	17,405	8,703	41.69	14.43	1.19	42.69

*OT=Radio+OutDoor+Cinema