

media UPDATE

Favourite brands of Malaysian youths

- 100 Plus, KFC, Mentos, Nokia, Twisties, Maxis, Maybank and Adidas are among the brands most favoured among young Malaysian consumers.
- *YouthSays*, a community of youths carried out a survey to find out their favourite brands.
- The online survey was based on a randomised sample of 10,208 Malaysian youths aged 15-35 conducted from 13 to 16 February 2009.

Favourite brands by category

Brand	Consumers (%)
<u>Snack Food</u>	
Twisties	69.2
Chipsmore	65.6
Mr. Potato	57.6
Mamee	53.6
Pringles	51.5
<u>Mint/gum</u>	
Mentos	79.5
Wriglesy's	55.8
Clorets	54.0
Hacks	44.2
Polo	41.9
Dentyne Ice	36.2
<u>Drink</u>	
100 Plus	81.7
Milo	74.0
Vitagen	63.6
Coca-Cola	59.0
Nescafe	58.1
Dutch Lady Milk	55.3
Yeo's	55.3
7-Up	52.9
Ribena	51.8
Pepsi	50.4
<u>Beauty/skincare</u>	
Johnson & Johnson	36.0
Biore	27.1
Bodyshop	25.3
L'Oreal	21.6
Olay	17.2
Garnier	13.1
Fair & Lovely	11.8
<u>Watch</u>	
Casio	33.0
Swatch	24.2
Adidas	21.5
Guess	14.6
Nike	13.1
Seiko	12.6
Tag Heuer	8.1
<u>Shoes</u>	
Adidas	45.7
Nike	43.6

Bata	43.5
Vincci	32.1
Nose	17.0
Reebok	15.9
Puma	15.1
<u>Mobile Phone</u>	
Nokia	70.2
Sony Ericsson	50.9
Motorola	16.6
Samsung	12.5
<u>PC/Lap Top</u>	
Acer	40.0
Dell	25.3
Compaq	23.0
HP	18.1
<u>Car</u>	
Proton	38.5
Perodua	34.0
Toyota	14.0
Honda	11.2
Nissan	5.0
BMW	4.3
<u>Bank</u>	
Maybank	65.1
CIMB	52.8
Bank Islam	28.1
Public Bank	24.3
RHB bank	14.4
AmBank	12.7
<u>Fast Food outlets</u>	
KFC	81.3
McDonald's	77.4
Pizza Hut	63.8
Secret Recipe	56.1
Burger King	38.9
A&W	38.5
<u>Mobile Phone Operators</u>	
Maxis	67.9
Celcom	43.7
Digi	29.4

Source: YouthSays Malaysia 2009

58.3% of internet home users use instant messaging

- According to HUIS 2008 (Household Use of the Internet Survey) by the Malaysian Communications and Multimedia Commission, 58.3% of internet users use instant messaging and findings revealed their preference as follows:

Messenger Usage

Yahoo Messenger	58.5%
Windows Messenger	58.5%
GoogleTalk	17%
Skype	14%

Source: MCMC

- Almost all instant messengers were used to communicate with family and friends (95%).

Reasons for use of Instant Messaging

Family, friends communications	95.0%
Making new friends	33.1%
Study discussion	31.0%
Business Communication	13.6%

Source: MCMC

- More than half of home internet users also access the internet at their workplaces (54.5%).

Internet access other than the home

Work	54.5%
Public (library, internet café, etc)	43.4%
School	27.8%
Hotspot	21.6%

Source: MCMC

Nielsen Media Index Q4 2008 newspaper readership

Average Issue Readership

Read Yesterday	2007	2008	Index
Adults 15+ '000	13,976	14,289	102
Reach	%	%	
Malay Mail	0.4	n.a.	0
New Straits Times	1.9	2.2	112
Star	7.4	7.6	103
Sun	1.6	1.7	104
Berita Harian	8.3	8.5	102
Harian Metro	14.2	15.4	108
Utusan Malaysia	6.4	6.4	100
Kosmo	3.3	2.8	83
China Press	4.9	5.5	112
Kwong Wah	1.5	1.6	105
Nanyang Siang Pau	1.4	1.2	88
Sin Chew Daily	8.2	8.0	97
Guang Ming Ribao	2.7	2.2	81
Oriental Daily News	0.4	n.a.	0
Nanban	1.9	1.7	90
Tamil Nesan	1.1	0.6	60
Any Bahasa Daily	26.8	29.3	109
Any Chinese daily	17.6	17.4	99
Any English Daily	9.3	9.6	104
Any Tamil Daily	3.0	2.6	88
Any Dailies	52.9	55.0	104

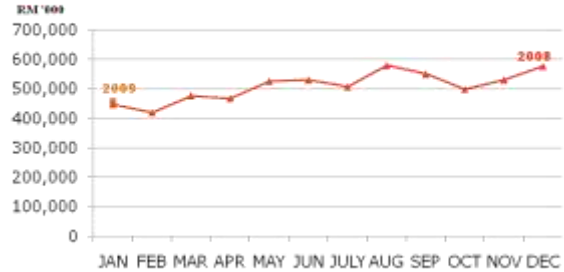
Source: Nielsen Media Index

- Average issue readers (AIR) of any dailies improved 4 percentage points in Q4 2008 against the same period last year. This is a significant improvement

when compared with a year ago when AIR dropped 4 percentage points.

January 2009 adex managed a positive growth

Monthly Adex Comparison 2008-2009



Source: Nielsen Media Research Adquest

Medium	Jan 08 RM mil	Jan 09 RM mil	Change +-%
FTV	129.2	145.1	12
Radio	21.4	24.4	14
Magazine	10.3	10.5	2
Press	268.3	258.6	-4
Cinema	2.2	2.7	19
Outdoor	7.8	8.3	7
P.O.S.	6.7	7.1	7
Internet	2.2	1.1	-48
Total	448.1	457.8	2

Source: Nielsen Adex

Top 10 Advertisers

	Advertiser	Jan 09 RM mil	Jan 09/08 Index
1	Procter & Gamble	8.7	81
2	Celcom	7.6	105
3	Nestle	7.1	160
4	Digi	7.0	76
5	Kementerian Kesihatan	6.5	421
6	Maxis	5.6	151
7	Giant TMC	5.5	184
8	Glaxo Smithkline	5.2	268
9	KFC Holdings	5.0	91
10	Tesco	5.0	261

Source: Nielsen Adex

- January 2009 adex posed a 2% year-on-year growth driven by Chinese New Year spending, eg hypermarket adex.

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