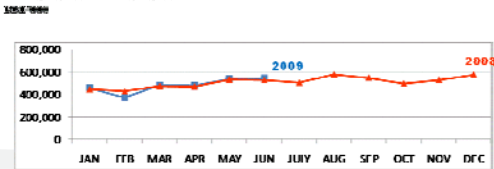


# media UPDATE

BY CARAT MEDIA SERVICES (M) SDN BHD

## 1H 2009 adex almost made it to last year's level

### Monthly Adex Comparison 2008-2009



Source: Nielsen Media Research August

Medium	Ytd Jun 2008 RM mil	Ytd Jun 2009 RM mil	Ytd Jun +-%	M-O-M +-%
FTV	947.6	1,001.6	6	4
Radio	134.7	148.8	10	8
Mag	72.4	64.3	-11	-16
Press	1,644.3	1,558.6	-5	1
Cinema	11.5	10.4	-10	55
Outdoor	47.6	55.2	16	3
P.O.S.	38.2	40.8	7	-6
Internet	15.0	16.7	12	3
<b>Total</b>	<b>2,911.3</b>	<b>2,896.4</b>	<b>-0.5</b>	<b>2</b>

Data sourced from Nielsen

- According to Nielsen, the advertising market is worth RM2.9 billion as of the first six months of this year.
- In terms of quarter-on-quarter comparison, Q2 2009 outperformed Q1 2009 by a significant 19%.
- Month-on-month adex grew a marginal 2%.

### Top 10 categories adex: 1H 09 vs 1H 08

Category	RM mil 1H 09	Chg %
Mobile Line Services	133.4	-24
Government - Local Institutions	129.1	36
Face Care - Women	81.0	16
University	61.8	10
Hypermarket	58.0	19
Tonic and Vitamin	54.7	18
Fast Food Centre	51.9	12
Hair Shampoo & Conditioner	48.6	8
Airline	45.9	4
Beauty Salon/Hairdresser	44.4	2

Data sourced from Nielsen

- Among the top 10 advertised categories, only the biggest spending category, mobile line services registered a decline in adspend.
- In spite of the significant decline of 24% in adspend by the leading category, adex among the top 10 categories in the first six months managed to show a growth of 2% over the same period last year.

### Newspaper adex: 1H 09 vs 1H 08

Newspaper	RM mil 1H 09	Change %
Star	386.9	-19
New Straits Times	159.0	25
Sun	47.3	-27
<b>Total English</b>	<b>689.5</b>	<b>-12</b>
Sin Chew Daily	164.2	-10
China Press	81.2	-12
Nanyang Siang Pau	20.8	-27
Guang Ming	28.5	-18
<b>Total Chinese</b>	<b>460.7</b>	<b>-10</b>
Berita Harian	116.5	6
Utusan Malaysia	96.1	-11
Harian Metro	170.3	60
Kosmos	19.5	23
<b>Total BM</b>	<b>403</b>	<b>18</b>
<b>Total Newspaper</b>	<b>1,558.6</b>	<b>-5</b>

Data sourced from Nielsen

- Only the Malay newspapers increased adex in 1H 2009.
- Harian Metro posed the biggest jump (+60%) in adex with RM170 million, accounting for 80% of the combined adex of Berita Harian and Utusan Malaysia. What is more profound is that both Utusan Malaysia and Berita Harian were leading the Malay newspapers in terms of adex during the same period last year.
- The Sun registered the biggest adex decline (-27%) among the English titles between the first half of 2009 and the same period last year. This is in spite of the fact that the newspaper declared a 15% increase in their published advertising rate for black and white advertisements (from RM39 to RM45 p.s.c.cm) from the beginning of 2009.
- The only free tabloid have been showing consecutive years of adex growths from 2006.

## TV adex: 1H 09 vs 1H 08

Station	RM mil 1H 09	Change %
TV 3	416.5	-2
8TV	177.3	16
NTV7	175.4	-2
TV9	128.1	35
TV 2	80.2	14
TV 1	24.2	5
Total TV	1,001.6	6

Data sourced from Nielsen

- A revamp to a more upbeat TV9 in 2009 appeared to have paid off with adex for the station increasing 35% in 1H 09 over the same period in 2008.
- TV9 TV adex share went up to 13% from 10% last year.
- It does seem to be that TV9's adex gain is at the expense of TV3 as the TV adex share of TV3 declined from 45% to 42% in the first half of the year.

## Radio adex: 1H 09 vs 1H 08

Station	RM mil 1H 09	Change %
Hot Fm	25.1	53
My Fm	21.3	14
Era Fm	21.2	-1
Mix Fm	13.6	-2
988	13.2	8
Hitz Fm	10.1	-12
Sinar Fm	8.9	36
Lite Fm	8.7	-11
THR	8.1	39
Fly Fm	5.5	-4
Total Radio	148.8	10

Data sourced from Nielsen

- For the first time, Hot Fm (launched in 2006) of Media Prima Radio Network leads radio advertising expenditure with a significant adex growth of 53% in 1H 09 over 1H 08. It climbed two notches passed Era and My Fm during this period.
- Significant radio adex growth was also recorded from THR (+39%) and Sinar (+36%).

## Global adspend down 7% in Q109 according to Nielsen

- Global adex of the main media (TV, newspaper, magazine and radio) dropped 7.2% during Q1 09 versus the

same period in 2008 according to Nielsen.

- All regions suffered declines with North America recording the biggest drop of 12.7%.
- Some countries in Europe experienced bigger adex declines during the same period. They are: Spain (-28%), Ireland (-21%), Italy (-19%) and the UK (-15%).
- Asia Pacific adspend decline is the least severe measuring only -2.3%. Adex growth from Indonesia (19%) and China (+2.5%) helped to sustain the adex in the region.
- Globally, print adex suffered the biggest decline with magazine and newspaper down 17.4% and 9.1% respectively.
- The situation regarding print adex is even more severe in North America where the adex decline for magazine and newspaper is 22.2% and 15.6% respectively.

## Adex by region: 1Q 09 vs 1Q 08

Region	Change (%)
Global	-7.2
North America	-12.4
Asia Pacific	-2.3
Europe	-8.7

Data sourced from Nielsen

## Adex by industry sector: 1Q 09 vs 1Q 08

Sector	Change (%)
Automotive	-19.9
Clothing & Accessories	-15.7
Distribution Channels	6
Entertainment	-3.5
Financial	-16.7
FMCG	0.2
Healthcare	-0.3
Industry & Services	-8.3
Media	-3.5
Telecommunications	-5.8

Data sourced from Nielsen

- Adex by industry sector is overwhelmingly showing negative growth except for distribution channels (+6.0%) and fast-moving consumer goods (+0.2%).
- Sectors that are presumably hardest hit by the global economic slowdown are showing the biggest adex decline. They are sectors from automotive (-19.9%), financial (-16.7%) and clothing and accessories (-15.7%).

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