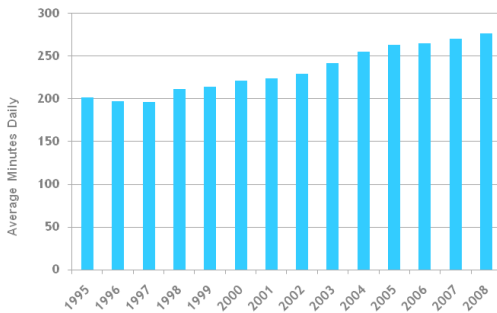


media UPDATE

TV thrives in tough times

- According to Nielsen, in 1995, Malaysians spent an average of 3 hours and 21 minutes per day on watching television.
- Fourteen years later, in 2008 that average daily TV viewing time has increased to 4 hours and 36 minutes – 37% increase in TV time equates to slightly over 5 minutes increase of daily TV time spent consistently every year.

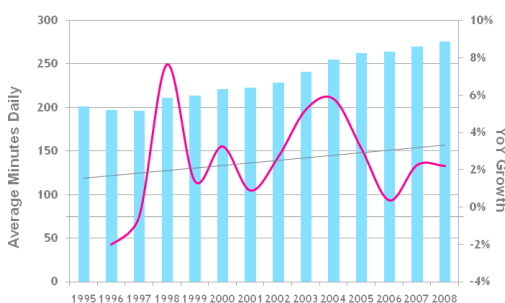
Average Daily TV Viewing Time 1995-2008



Panel size: 1,000 homes
All viewers 6 years+
All day-parts
Source: Nielsen

- While TV continues to register growth in time spent year after year, in reality the year on year increase has not been entirely smooth or consistent.
- Growth spurts in average daily TV viewing time trend coincides with affairs of the day.
- The average year on year growth of daily TV viewing time is 2.5%.
- This growth exceeds the mean (average) or the compound average growth rate (CAGR) of 2.3% - depending on the severity of distress.

TV Watching Growth Pattern



Panel size: 1,000 homes
All viewers 6 years+
All day-parts
Source: Nielsen

Cinema ticket sales are holding up

- Cinema collection in Malaysia in 2008 is worth RM380.7 million growing 32% year on year according to the National Film Development Corporation Malaysia.
- English films are the most popular in Malaysia, accounting for 70% share of cinema collections and admissions. Its share have grown considerably since 2006 where its share was 60%.
- share of cinema collections and admissions have grown

Cinema collection by film language (RM Mil)

	2007	2008	Chg %
English	201.66	265.08	+31
Malay	30.00	43.93	+46
Chinese	28.37	37.86	+33
Tamil	14.30	17.14	+20
Others	14.98	16.71	+12
Total	289.31	380.72	+32

Source: National Film Development Corporation Malaysia

Cinema admission by film language (Mil)

	2007	2008	Chg %
English	23.26	30.12	+29
Malay	3.73	5.29	+42
Chinese	3.30	4.34	+32
Tamil	1.57	2.13	+36
Others	1.69	1.97	+17
Total	33.55	43.85	+31

Source: National Film Development Corporation Malaysia

- Will the cinema industry survive the economic downturn unscathed? During the Asian Financial Crisis when adex declined 17% in 1998, Cinema adex increased 15% to reach RM10.7 million. In 2003 during the SARS outbreak, cinema adex grew 29% to reach RM 12.6 million whilst the advertising market grew a slower 10%.
- According to the National Film Development Corporation Malaysia, number of screens have increased 28% in 2008 to 453. In the last three years number of screens have more than doubled. Number of seats have increased 18% for the same period to 92,642.

