

# media UPDATE

BY CARAT MEDIA SERVICES (M) SDN BHD

## Top English radio channels buck the trend

Top 10 Channel Weekly Reach Audience

	Channel	%	People 10 years+ '000	Change S1 09 vs S2 08
	Base		16,407	
1	ERA	24.3	3,985	-11.8
2	SINAR	23.3	3,823	14.5
3	Hotfm	23.0	3,776	-12.5
4	THR Raaga/THR Gear	19.4	3,177	10.6
5	My FM	13.2	2,167	-1.7
6	988	9.0	1,482	-13.1
7	Hitz.fm	7.8	1,287	47.4
8	Klasik Nasional	7.2	1,187	-22.0
9	Muzikfm	5.3	874	-6.6
10	Fly Fm	4.9	800	70.2

Source: Nielsen Radio Audience Measurement (RAM)

- A comparison of the top 10 radio channels based on average weekly audience of all individuals aged 10 years and above between Sweep 2 2008 (October) and Sweep 1 2009 (March) according to Nielsen RAM showed 4 channels (SINAR, THR, Hitz.fm and Fly Fm) with improved weekly listeners.
- English radio channels specifically, showed outstanding audience growth with Hitz.fm gaining 414,000 weekly listeners (+47%) and Fly Fm with an additional 330,000 weekly audience (+70%).
- SINAR is the only Malay channel in the top 10 with an improved audience (+15%). Its average weekly audience have been growing in the last three sweeps – from 16.2% to 20.4% to 23.3% moving from third to second ranking in the latest sweep!
- Both the Chinese channels of MY FM and 988 showed reduced listeners between Sweep 2 2008 and Sweep 1 2009.

## Malaysian consumer confidence index above global average

- Consumer confidence index as measured by Nielsen for first half 2009 showed Malaysia with a score of 81 – higher than the global average of 77.
- Indonesia is the only country in Asia Pacific to register above the 100 index mark in the first 6 months of 2009.

- The global average has been on the decline from an index of 99 in 2H 2006 to the lowest of 77 in 1H 2009.
- Taiwan is the only country to buck the global trend with an improved index – from 60 in 2H 2009 to 63 in 1H 2009.

## Consumer Confidence Index

Asia Pacific	2H 08	1H 09	Changes 1H 09 vs 2H 08
Malaysia	88	81	-7
China	96	89	-7
Australia	104	92	-12
South Korea	36	31	-5
India	114	99	-15
Hong Kong	88	70	-18
Indonesia	110	104	-6
Philippines	102	96	-6
Thailand	89	81	-8
New Zealand	98	90	-8
Singapore	92	80	-12
Taiwan	60	63	+3
Global Average	84	77	-8

Base: All respondents n=7072, Source: Nielsen

- The economy and job security are the top concerns according to the twice yearly Nielsen Global Consumer Confidence Index.
- Although “job security” is ranked second, its jump in concern over the past 6 months is the most significant (from 9 to 22).

## Biggest concern over the next 6 months (global average)

	Concern	2H 08	1H 09
1	The economy	20	23
2	Job security	9	22
3	Work/life balance	10	8
4	Debt	6	7
5	Health	8	6
6	Children's education and/or welfare	6	5
7	Increasing food prices	9	5
8	Increasing utility bills	8	5
9	Parents welfare and happiness	3	3
10	Global warming	2	2

Base: All respondents n=25140

Source: Nielsen

## APAC media spend grew 13% in 2008

- According to Nielsen AIS, media spend monitored across 12 Asia Pacific markets showed a 13% year-on-year increase in

2008 despite the onset of an economic downturn.

- Only 3 countries recorded negative adspend. They are: South Korea (-8%), Thailand (-3%) and Taiwan (-7%).

Market	2008 USD mil	% Diff YoY
Malaysia	1.8	12%
China	68.8	17%
Australia	8.1	2%
Hong Kong	7.4	10%
India	7.0	25%
South Korea	6.2	-8%
Indonesia	4.6	19%
Philippines	3.8	11%
Thailand	2.9	-3%
New Zealand	2.0	1%
Singapore	1.4	7%
Taiwan	1.3	-7%
<b>Total media</b>	<b>115.2</b>	<b>13%</b>

Source: Nielsen AIS

- China practically drives the Asia Pacific advertising market with 60% share of the adspend pie. Its media usage will undoubtedly influence the overall media mix for the region.
- Overall, free TV accounts for 66% share followed by newspaper (23%) and magazine (5%).
- Out of the 12 markets monitored, half prefer newspaper to free-to-air TV.
- Taiwan is unique as Pay TV accounts for a third of the advertising investment.

## Adspend by medium

Market	FTV	Npp	Mag	Others
Malaysia	35%	54%	3%	8%
China	83%	15%	2%	-
Australia	39%	34%	11%	16%
Hong Kong	30%	34%	17%	19%
India	31%	47%	6%	16%
South Korea	35%	55%	6%	4%
Indonesia	63%	33%	4%	-
Philippines	72%	5%	1%	22%
Thailand	55%	19%	7%	19%
New Zealand	55%	19%	7%	19%
Singapore	35%	41%	6%	18%
Taiwan	10%	26%	14%	50%

Source: Nielsen AIS

## Measat launches Astro Mustika Pack

- Astro Mustika Pack is a new pay TV package comprising 3 new channels - Astro Citra (channel 131), Astro Warna (channel 132) and B4U (channel 133).
- Astro Warna is comedy content while Astro Citra offers movies in the Malay language.

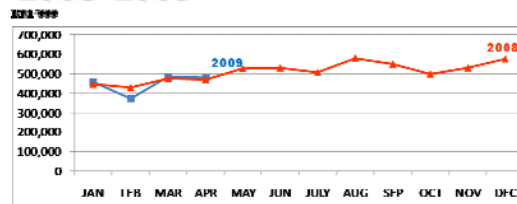
- B4U is a hybrid of Bollywood movies, music and Bollywood lifestyle entertainment shows.
- The new package is priced at RM12.95 per month.
- Astro currently has a penetration of 45% of TV households in Malaysia.

## First Chinese free paper in Malaysia

- Red Tomato the first free Chinese economic and lifestyle weekend tabloid is scheduled to launch on 3<sup>rd</sup> July 09.
- It is published by Talent Plus Sdn Bhd, starting with a circulation of 100,000 copies in KL/PJ targeting the 13-35 year olds.
- 80% will be distributed to homes.
- A full page full colour advertisement costs RM9,800

## April adex remains on track

### Monthly Adex Comparison 2008-2009



Source: Nielsen Media Research Adspend

Medium	Ytd Apr 2008 RM mil	Ytd Apr 2009 RM mil	Ytd Apr +/- %	M-0-M +/- %
FTV	573.5	599.9	5	2
Radio	84.9	90.8	7	-5
Mag	45.7	40.7	-11	-4
Press	1,063.1	997.8	-6	-3
Cinema	6.5	6.6	2	21
Outdoor	32.3	32.1	-1	-6
P.O.S.	25.5	26.8	5	8
Internet	8.5	10.4	22	-3
<b>Total</b>	<b>1,839.8</b>	<b>1,805.0</b>	<b>-2</b>	<b>-1</b>

Source: Nielsen Adex

- Monitored free-to-air TV adex continues to grow year-on-year and month-on-month ahead of the advertising market growth.
- Newspaper adex decline of 6% in ytd April 2009 is driving down the overall adex to -2% growth.

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