

MEDIA LANDSCAPE 2017 - SNAPSHOT

AN OVERVIEW OF MALAYSIAN CONSUMERS & THEIR
MEDIA CONSUMPTION BEHAVIOR

SETTING THE CONTEXT

This is an abridged version of the Nielsen 2017 Media Landscape Report. The full report, which is available for purchase, covers:

- Nielsen **Consumer Confidence Index (CCI)**
- **Media Consumption Behaviour** and segmentation
- **Reach** by media type
- **Newspaper** - readership, advertizing expenditure (ADEX), top titles, top advertisers
- **Radio Listenership** - profile, ADEX, top advertisers
- **Television** - reach, share, top channels by race, free-to-air (FTA) viewership, top genres, top advertisers
- **Out of Home**
- **Cinema** - frequency of visit, advertizing opportunities, top advertisers
- **Total Adspend** and top categories,
- **Digital Media** - Internet users, online activity, content consumption, tech purchase
- **E-commerce**

If you would like to purchase the full report, please contact Nielsen.Malaysia@nielsen.com.

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SNAPSHOT




MARKET SNAPSHOT

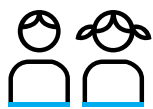
TOP WEEKLY REACH


>80%
 TV & OUTDOOR


76%
 RADIO


73%
 INTERNET &
 DAILIES/ E-NEWS

 **19%**
 READ E-NEWS
 DAILY



94% OF YOUNG ADULTS BETWEEN 15-24
 CONSUME BOTH TRADITIONAL AND DIGITAL MEDIA



15.8 HOURS AVERAGE WEEKLY
 TIME SPENT ON SMARTPHONES
 BY INTERNET USERS

73% TV
 VIEWERS



ARE PAY TV
 SUBSCRIBERS

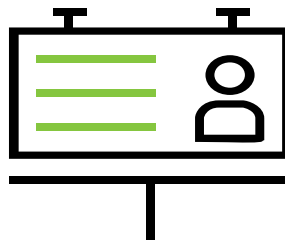


>60%

RADIO LISTENERS ARE
 WORKING ADULTS

94%

OF OUTDOOR
 ADVERTISING AUDIENCES'
 MAIN MODE OF
 TRANSPORTATION IS CAR



82%

SEEN LARGE POSTERS ON
 BOARDS AT
 THE ROAD SIDE/BUILDINGS

CONCERNS ON THE NATION'S ECONOMIC OUTLOOK, JOB SECURITY AND DEBT
 CONTRIBUTED TO MALAYSIA'S PESSIMISTIC BUT STABLE CONSUMER
 CONFIDENCE IN Q4 2017



Sources:

- The Conference Board® Global Consumer Confidence™ Survey, in collaboration with Nielsen (Q4 2017)
- Nielsen Consumer & Media View Jul'16-Jun'17
- Nielsen Ad Intel (Jan'17-Dec'17)
- Nielsen Cross-platform Study, 2017

DATA SOURCES



SYNDICATED STUDIES OVERVIEW

The media landscape is collected from a variety of Nielsen proprietary syndicated studies.



Consumer & Media View (CMV)

Sample:

- 10,000 Peninsular Malaysia (Pen MY) individuals

Methodology:

- Face-to-face interview

Coverage:

- Individuals aged 15+ (reflecting government statistics)
- Peninsular Malaysia



Television Audience Measurement (TAM)

Sample:

- 1,100 panel Pen MY homes

Methodology:

- Peoplemeter Technology

Coverage:

- All individuals aged 4+
- Peninsular Malaysia



Ad Intel

Adspend covered:

- FTA Television
- Radio
- Print
- Magazine
- In-store
- Cinema



Cross Platform Study

Sample:

- 1,100 individuals

Fieldwork period:

- February – April 2017

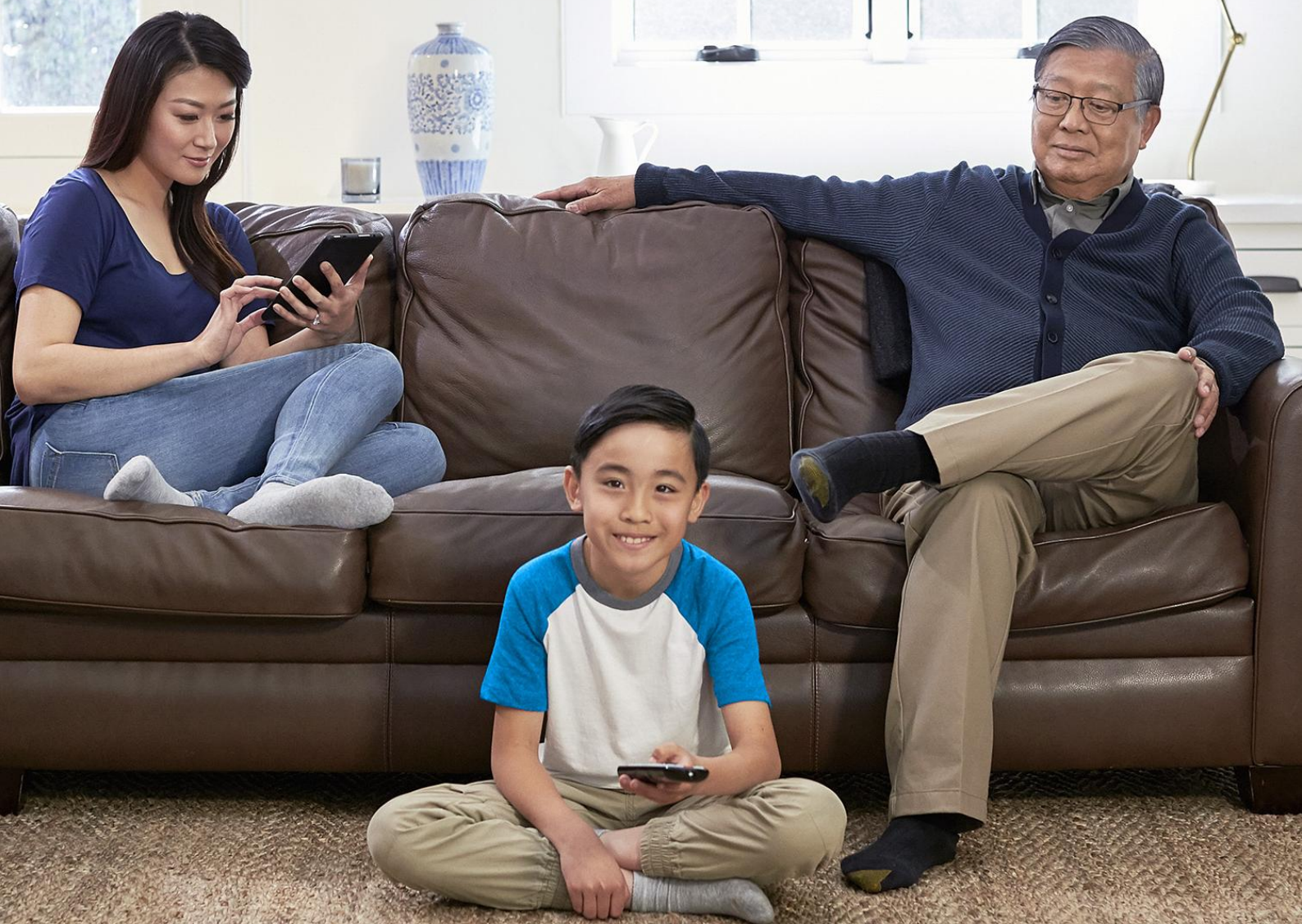
Coverage:

- All aged 16+, Internet users
- Peninsular Malaysia

For the purpose of supporting the data and insights provided in this report, references to external/ third party sources have been made; i.e Statisa.com

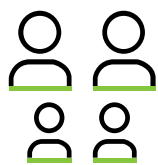
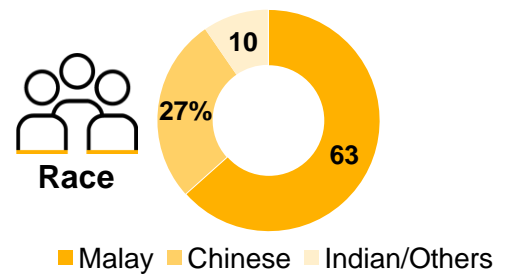
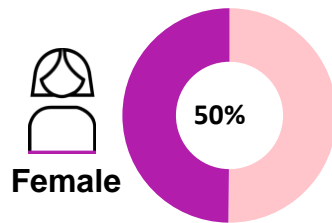
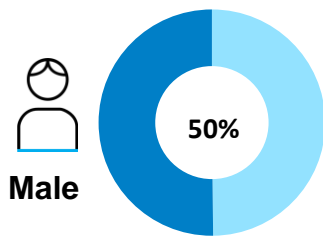
Nielsen Audience Measurement (NAM)

MALAYSIAN CONSUMERS

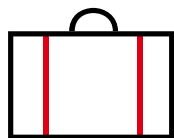
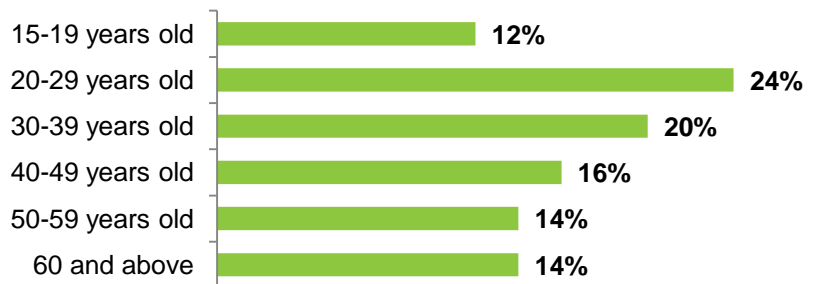


MALAYSIAN CONSUMERS (AGED 15+)

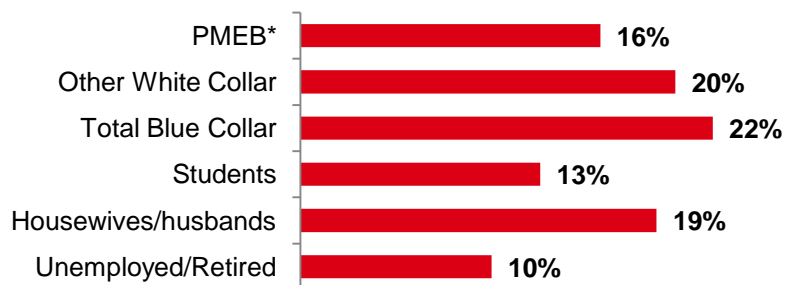
A balanced proportion of males and females, with 60% of consumers falling in the 20-49 age group, reflecting Malaysia's younger population.



Age



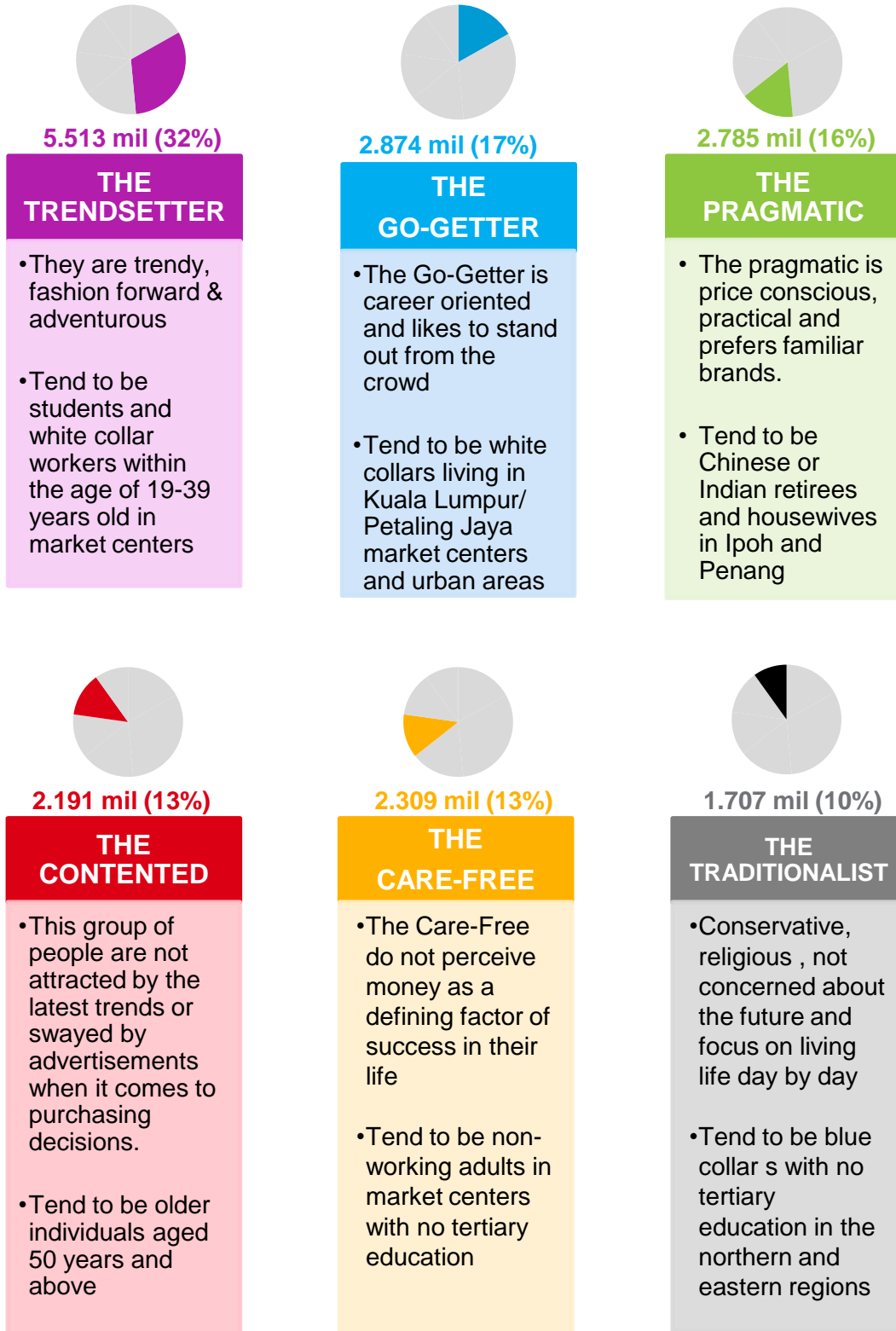
Occupation



Source: Nielsen Consumer & Media View, Jul'16-Jun'17
 Base: All people aged 15+ years (17.378 mil)
 *PMEB = Professionals, Managers, Executives and Businessmen

KEY SEGMENTS

Meet the consumers



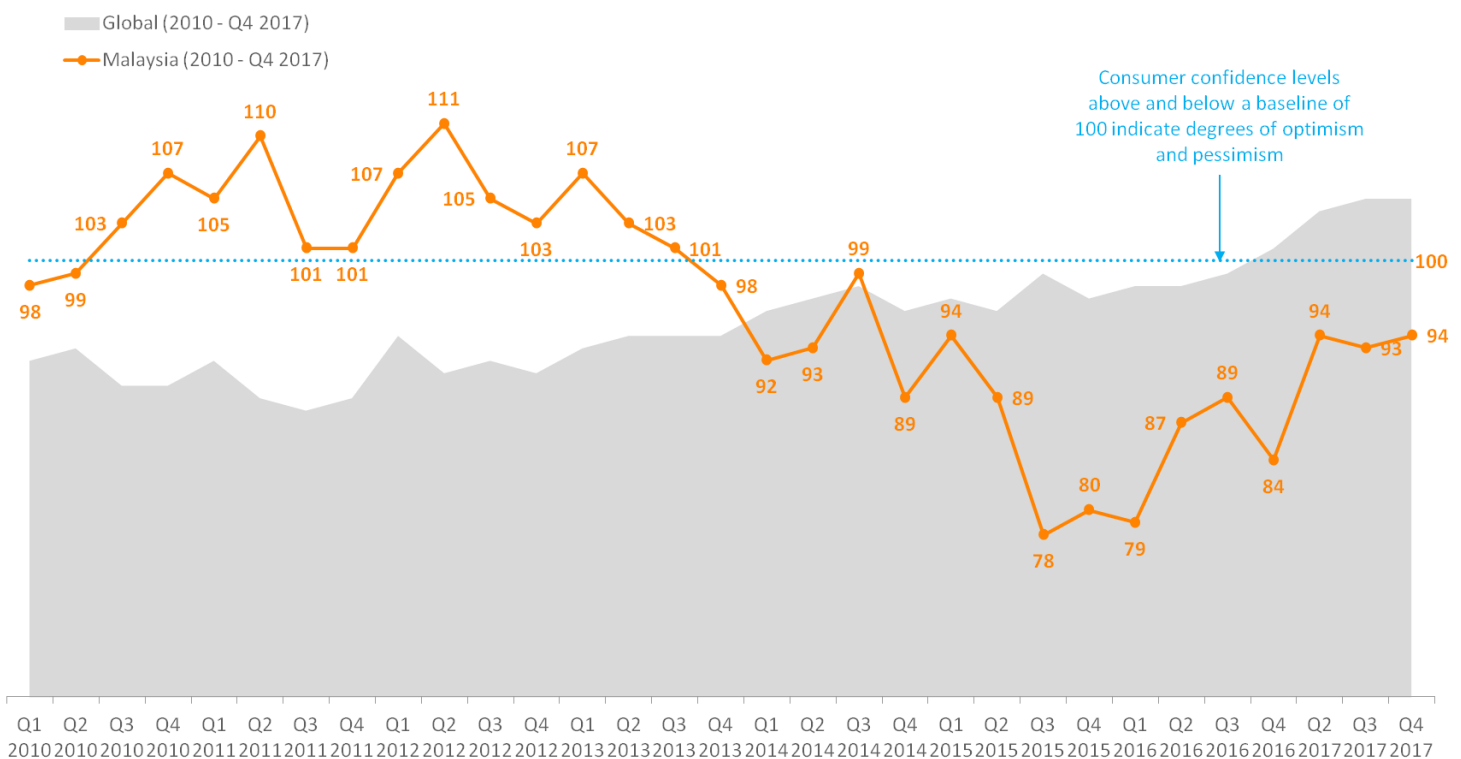
Source: Nielsen Consumer & Media View, Jul'16-Jun'17
 Base: All people aged 15+ years (17.378 mil)



MALAYSIAN CONSUMER CONFIDENCE

THE CONFERENCE BOARD® GLOBAL CONSUMER CONFIDENCE™ SURVEY

Malaysia vs Global (2010 – Q4 2017)

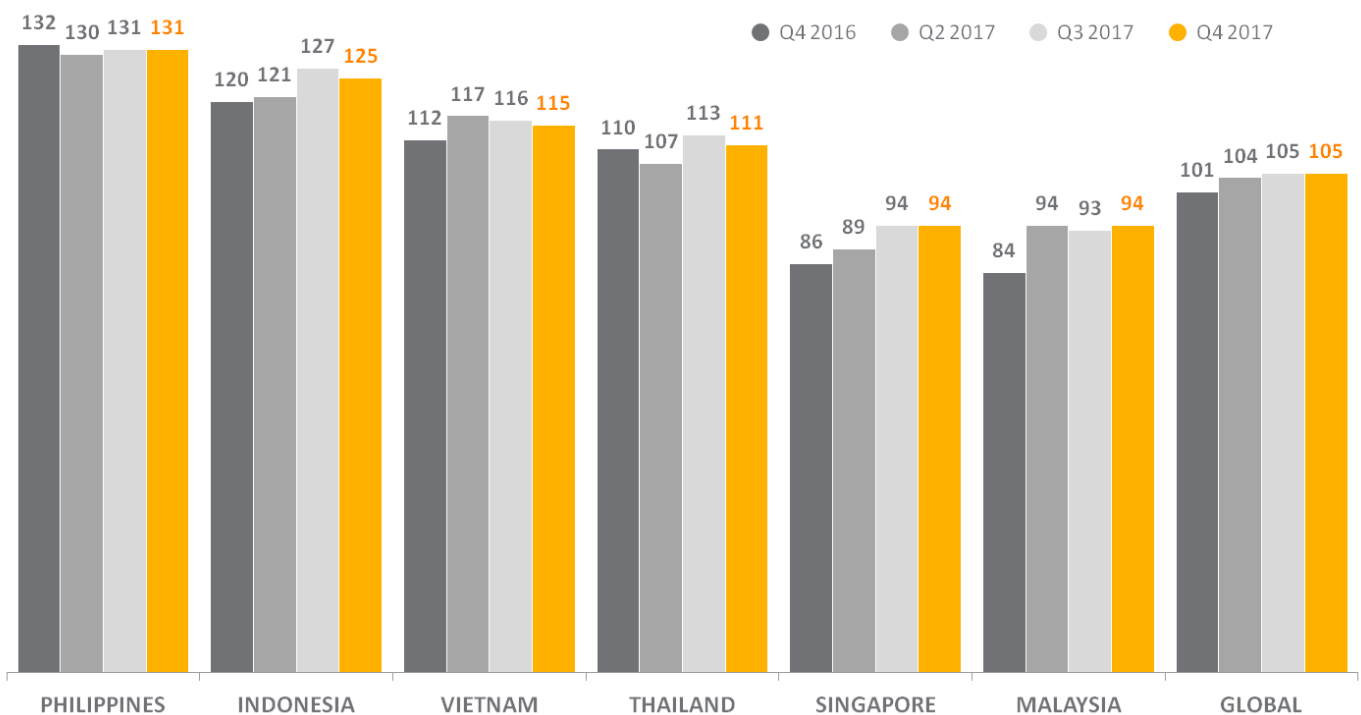


Source: The Conference Board® Global Consumer Confidence™ Survey, in collaboration with Nielsen (Q4 2017)

There is a break in trend as the CCI was not carried out in Q1 2017.

THE CONFERENCE BOARD® GLOBAL CONSUMER CONFIDENCE™ SURVEY

Southeast Asia vs Global (Q4 2016 – Q4 2017)

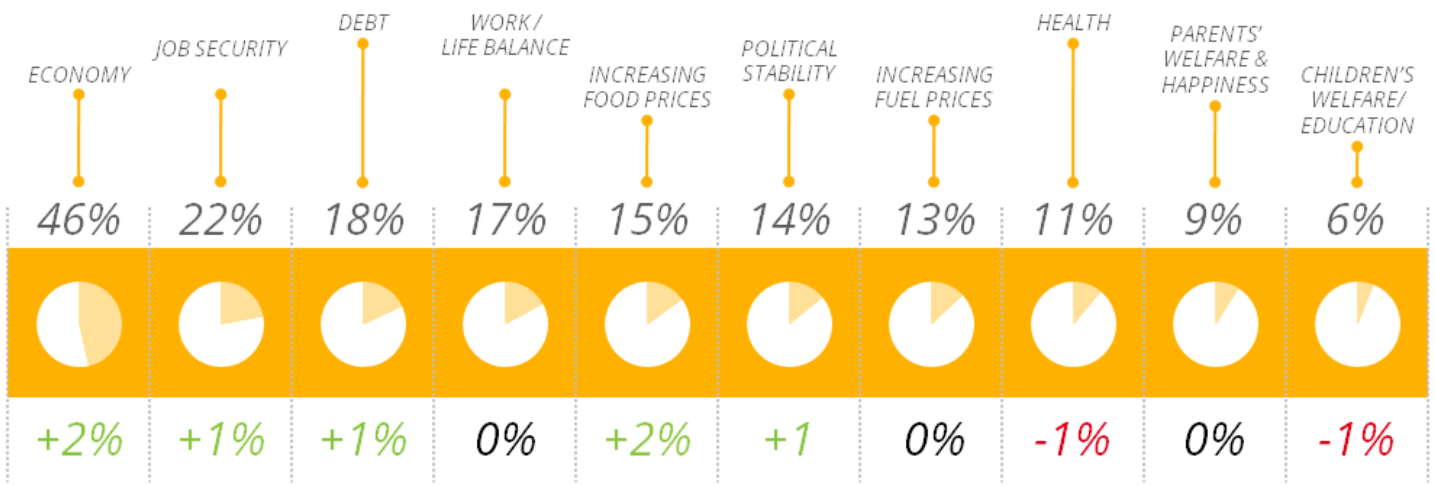


Source: The Conference Board® Global Consumer Confidence Survey™, in collaboration with Nielsen (Q4 2017)

There is a break in trend as the CCI was not carried out in Q1 2017.

TOP 10 CONCERNS

The economy remains the biggest concern among Malaysians and worries about job security and debt have also increased. This has potentially increased demand for personal loans and other financing options.

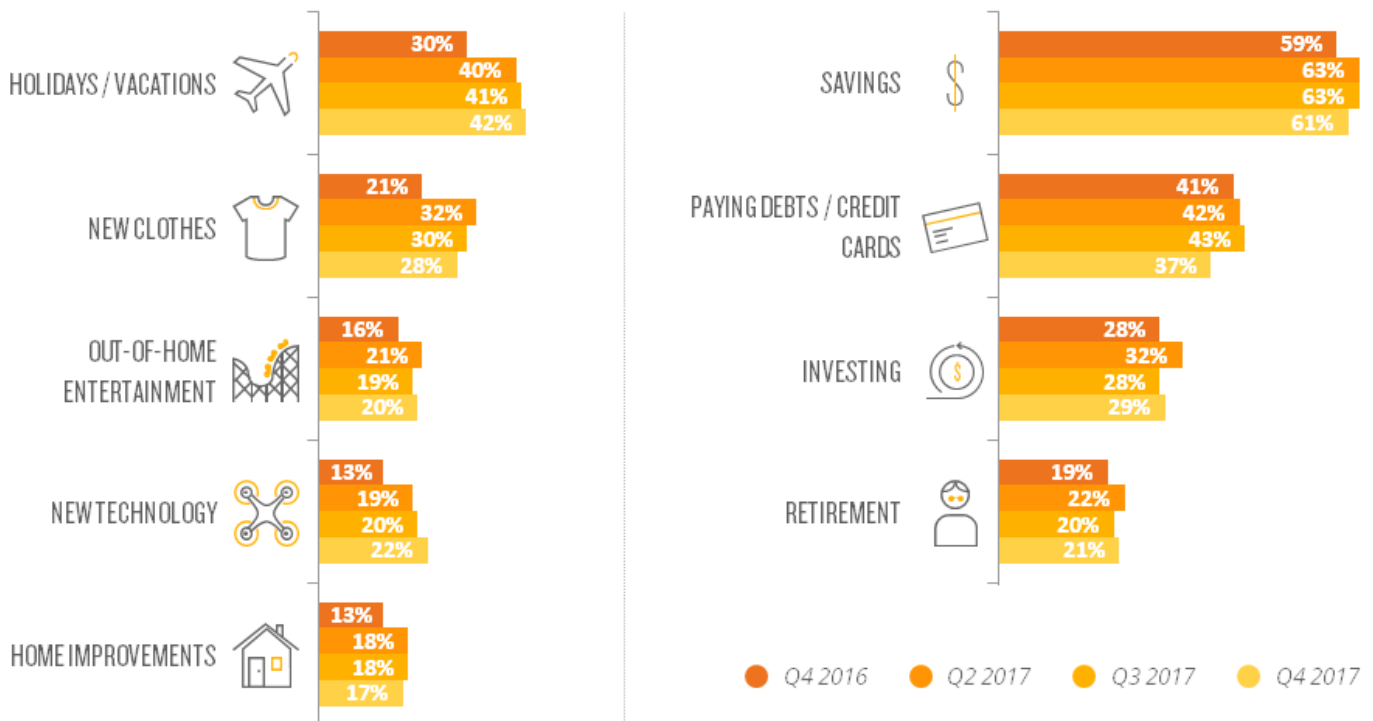


Q4 2017 VS Q3 2017 PERCENTAGE POINT DIFFERENCE

Source: The Conference Board® Global Consumer Confidence™ Survey, in collaboration with Nielsen (Q4 2017)

SPENDING SPARE CASH

Malaysian consumers are prioritizing saving and paying off debt, but travel is still a top intention. A surge in campaigns offering affordable travel packages and promotions in the past year could result in spending spare cash on holidays/ vacations, especially as overall confidence improves.

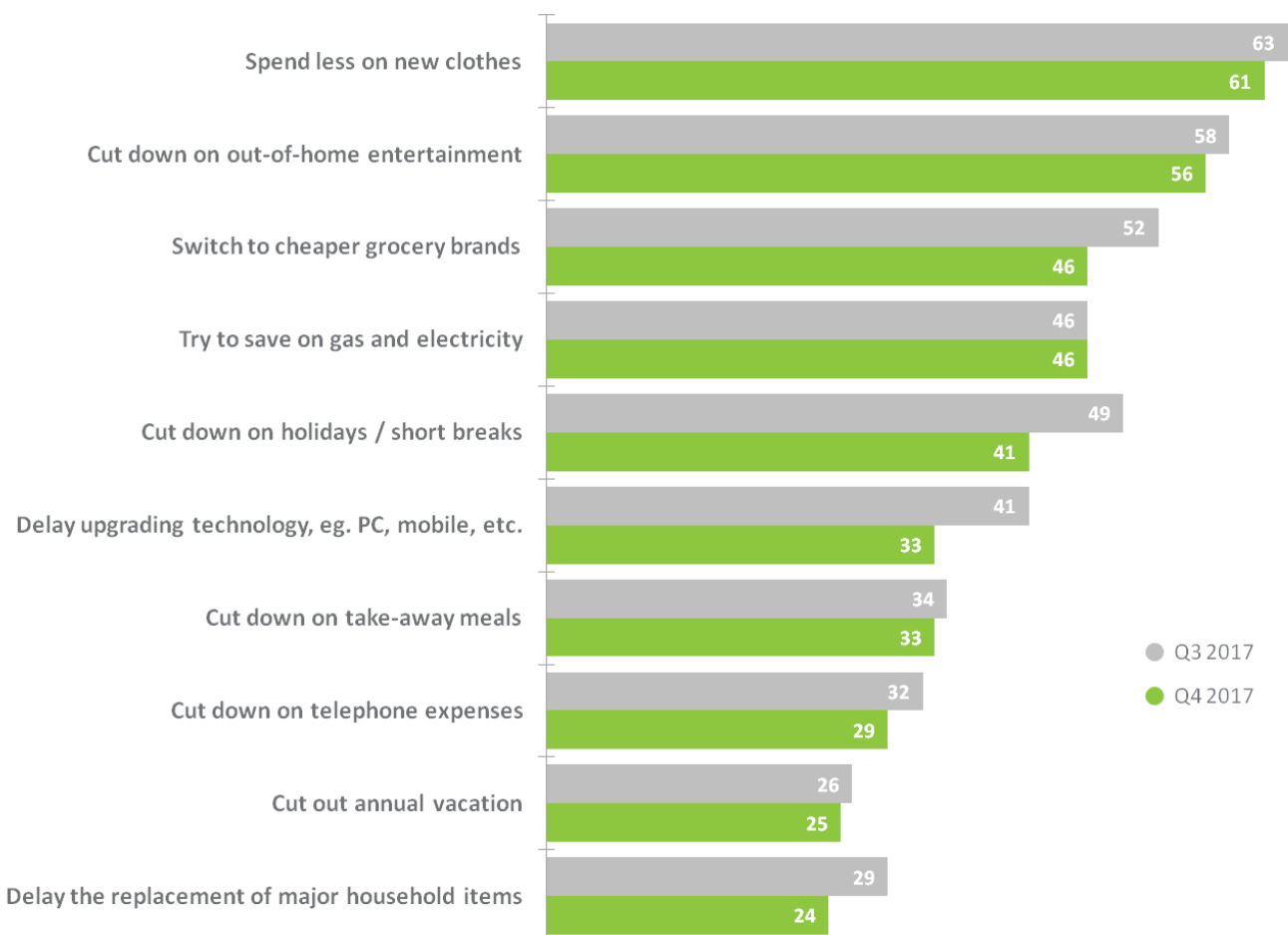


Source: The Conference Board® Global Consumer Confidence™ Survey, in collaboration with Nielsen (Q4 2017)

There is a break in trend as the CCI was not carried out in Q1 2017.

ACTIONS TAKEN TO SAVE MONEY

Actions taken by Malaysians to save money include spending less on new clothes, cutting down on out-of-home entertainment and switching to cheaper grocery brands. Brands can benefit from demonstrating value for money and offering value packages to show empathy and ensure continued loyalty.



Source: The Conference Board® Global Consumer Confidence™ Survey, in collaboration with Nielsen (Q4 2017)

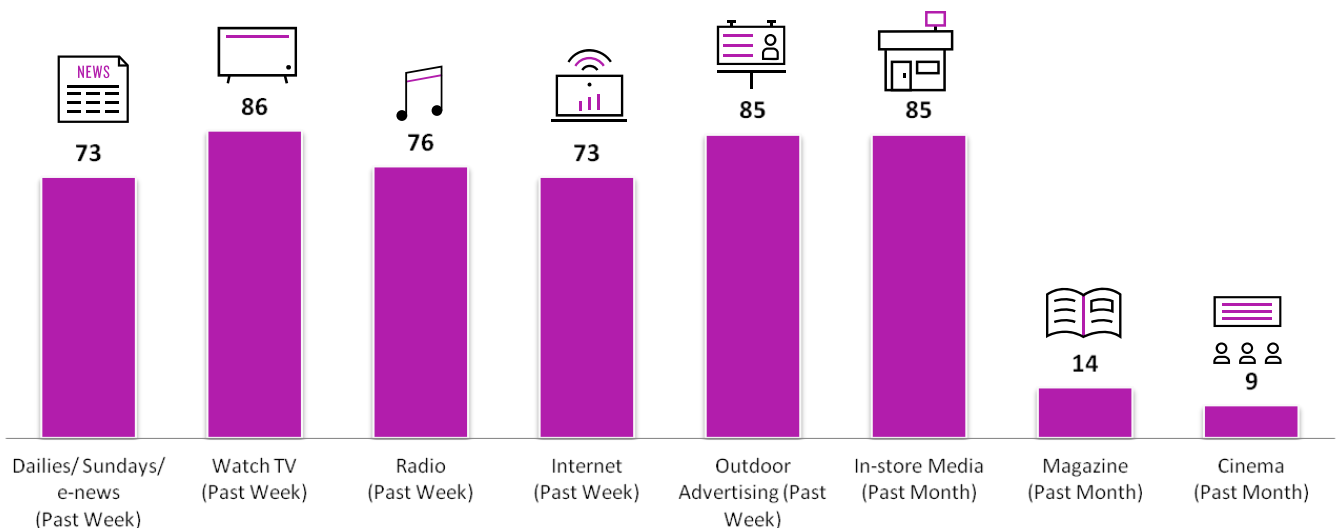
MEDIA CONSUMPTION BEHAVIOUR



MEDIA REACH

Internet reach continues to grow steadily, however, traditional media still dominates, with at least 70% reach among those aged 15 and above.

While digital continues to grow, traditional media remains relevant and is ideal for mass marketing (driving awareness, etc.).



*There is a break in trend i.e. from radio fused data sourced from RAM (diary) to claimed behaviour

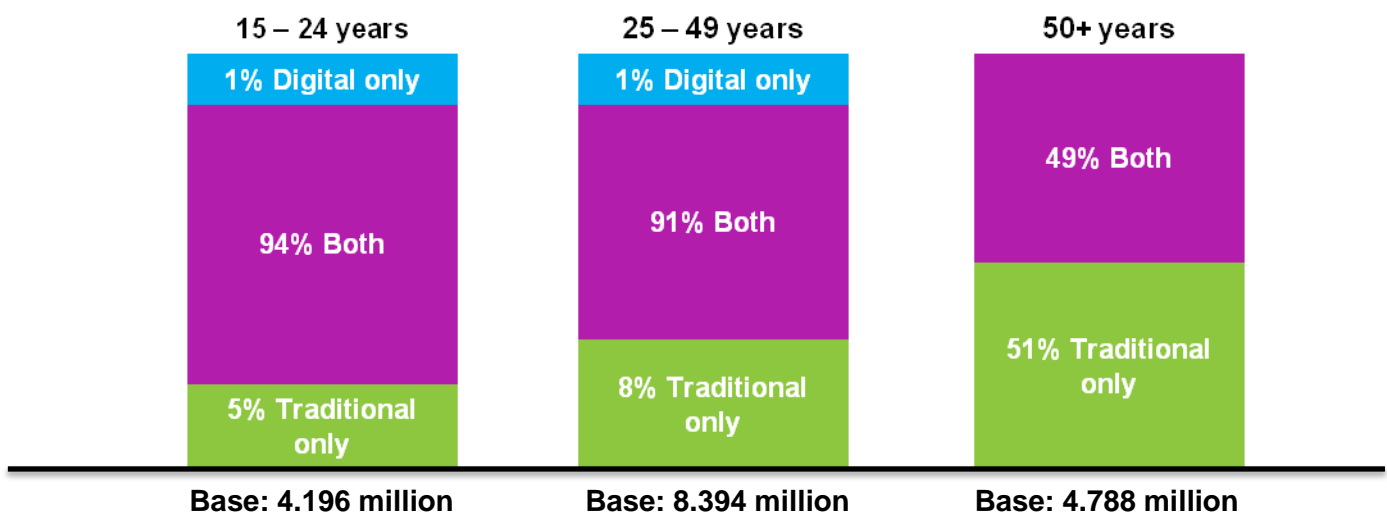
Source: Nielsen Consumer & Media View (Jul'14- Jun'15, Jul'15-Jun'16, Jul'16-Jun'17)

Base: All people aged 15+ years (Jul'16-Jun'17 - 17.378 mil)

TRADITIONAL + DIGITAL

While the significance of digital media decreases with age, it still plays a role in the lives of all Malaysian consumers.

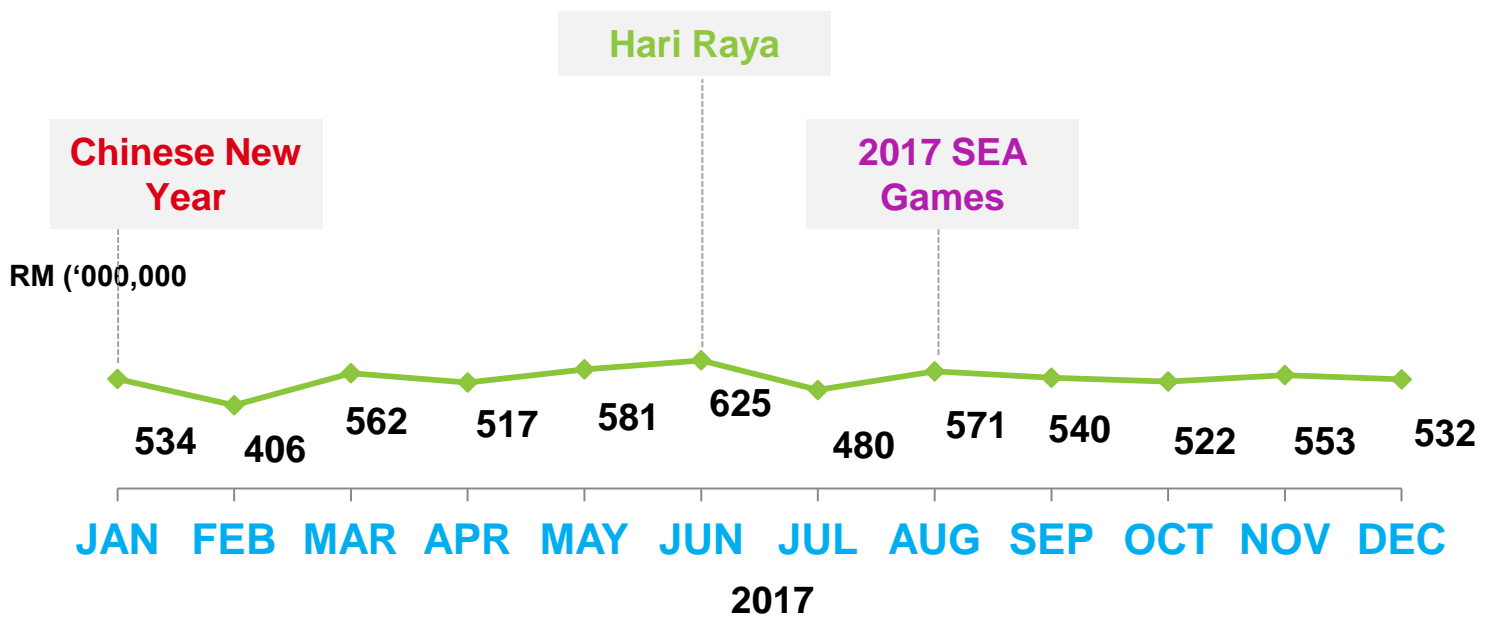
Similarly, the role of traditional media should not be underestimated for younger consumers. Digital can provide incremental reach on top of the mass reach that traditional media is capable of delivering.



Source: Nielsen Consumer & Media View Jul16-Jun'17

Traditional media includes daily newspaper read past week, TV viewing past week, radio listenership past week and non-digital outdoor advertising. Digital media includes internet used past week, e-news (websites/digital replica) read past week and digital video screen viewership past one month

2017 ADSPEND OVERVIEW



Adspend got off to a good start in January due to the **Chinese New Year (CNY)** festival, driving a boost in spending by advertisers on CNY-related promotional campaigns.

June recorded the highest adspend in 2017 as advertisers increased their spending in conjunction with the **Hari Raya** festival and mid-year school holidays.

Adspend grew by 19% in August compared to the previous month of July, due to the launch of the 2017 **Southeast Asian (SEA) Games**. This is indicated by the launch of new ad campaigns related to the regional sports event.

Source: Nielsen Ad Intel (Jan'17-Dec'17)

Note: Nielsen measures advertising spending based on published rate cards and monitors adspend for FTA TV based on actual broadcast times and commercial spots. Pay TV, Outdoor and Internet adspend are not reported.

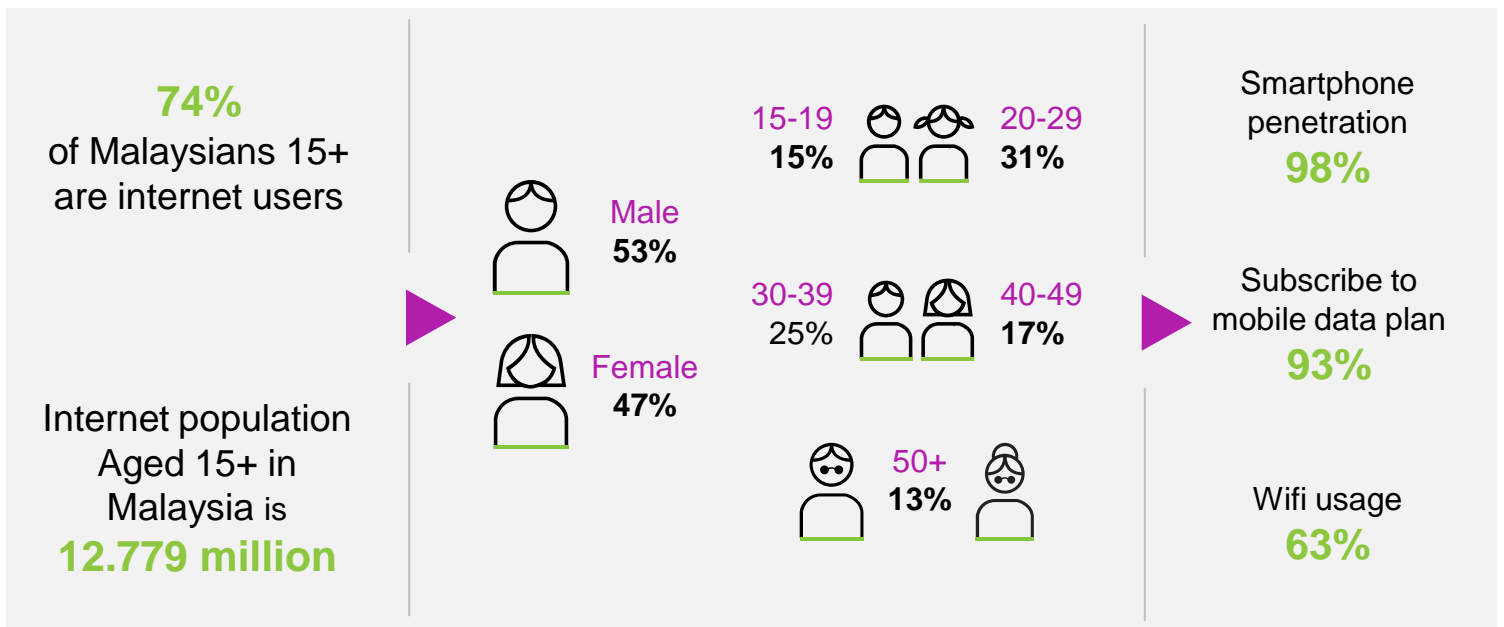
DIGITAL MEDIA CONSUMPTION



INTERNET USERS

Malaysia has high internet penetration at almost three quarters of the population. While access is across all demographics, 57% of Internet users are aged between 20 and 39 years old.

The high smartphone penetration results in high demand for a mobile data plan.



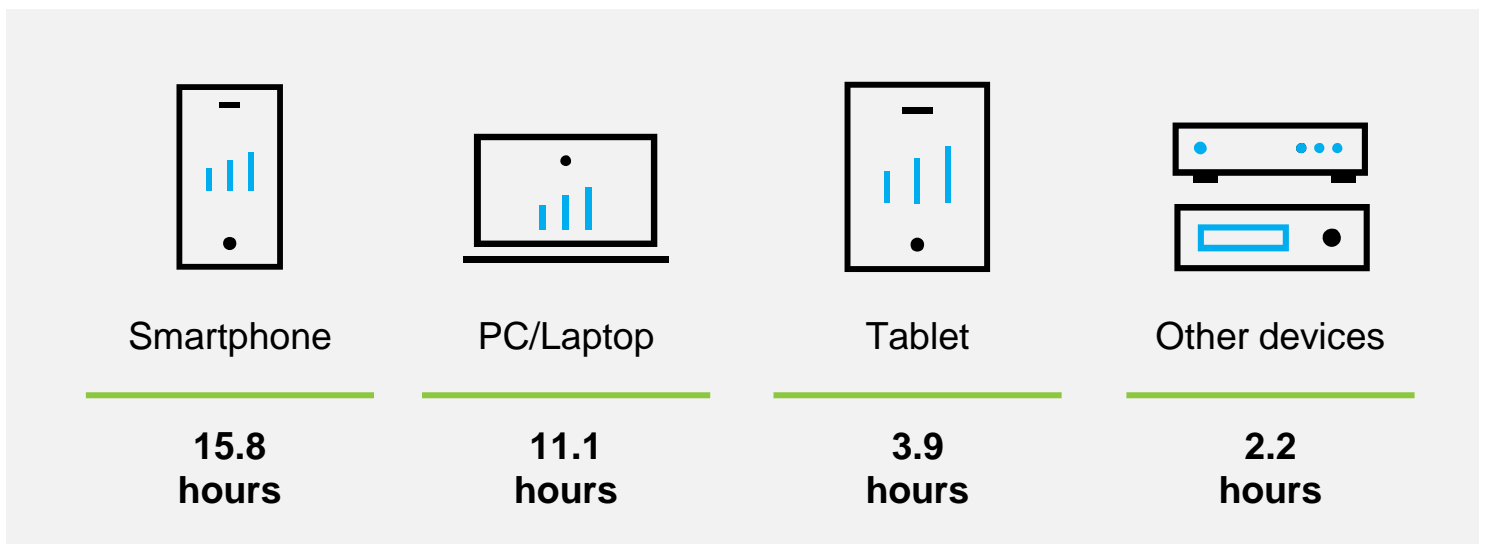
Nielsen Consumer & Media View (CMV), Jul'16-Jun'17
 Base: All 15+, accessed internet past month (12.779 MM)

AVERAGE WEEKLY TIME SPENT BY DEVICE

Smartphones play an integral role in daily connectivity and usage, making it the most important device in consumers' lives.

Mobile is expected to account for 40% of total digital adspend in Malaysia in 2018, up 5% since 2016.

(www.statista.com)



Nielsen Cross-platform Study, 2017
Base: Internet users 16+, n=1,100

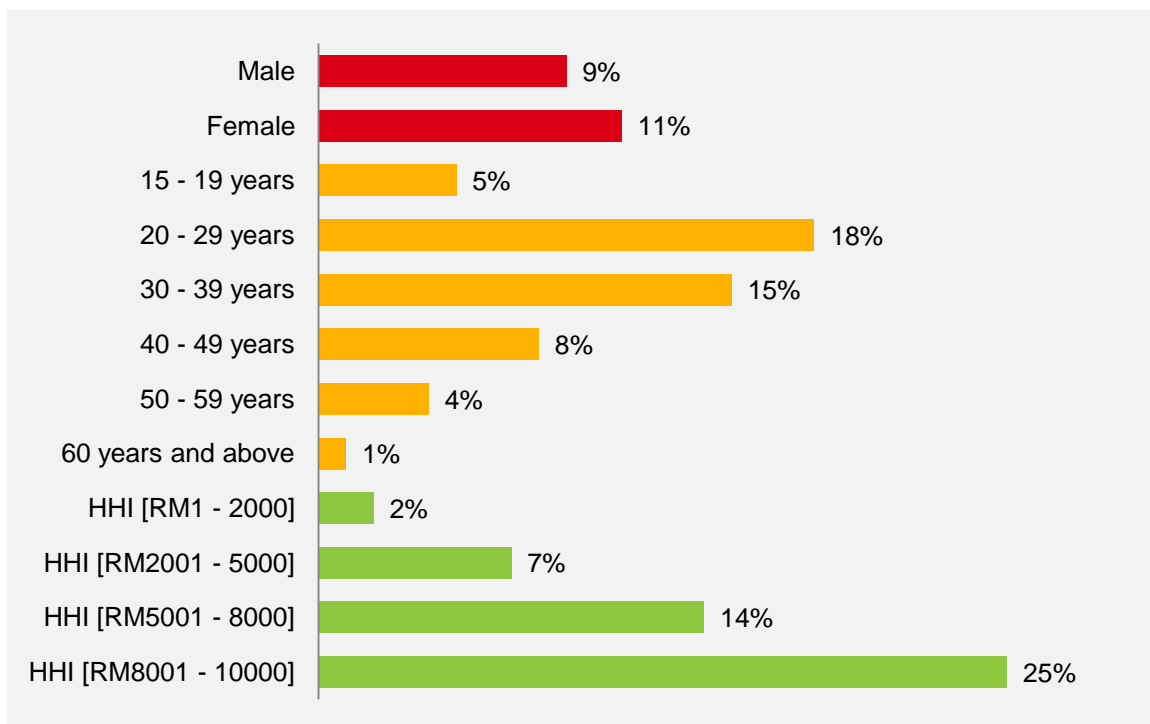
E-COMMERCE SHOPPER BEHAVIOR



ONLINE SHOPPERS

10% of individuals have shopped online, the majority of whom have high spending power (household income > RM8,000). Since the majority of online shoppers are below 39 years old, they are generally more engaged online, and appear more trusting of buying products online given their greater use of the technology.

Online shoppers 2017



Online shoppers (%)	Q2 2016	Q2 2017
	6.7	9.9
Average age	Online Shopper	All 15+
	32	40

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge. For more than 90 years Nielsen has provided data and analytics based on scientific rigor and innovation, continually developing new ways to answer the most important questions facing the media, advertising, retail and fast-moving consumer goods industries. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.

THE SCIENCE BEHIND WHAT'S NEXT