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.
## CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>SNAPSHOT</td>
<td>4</td>
</tr>
<tr>
<td>DATA SOURCES</td>
<td>6</td>
</tr>
<tr>
<td>MALAYSIAN CONSUMERS</td>
<td>8</td>
</tr>
<tr>
<td>MALAYSIA CONSUMER CONFIDENCE INDEX (CCI)</td>
<td>11</td>
</tr>
<tr>
<td>MEDIA CONSUMPTION BEHAVIOR</td>
<td>16</td>
</tr>
<tr>
<td>DIGITAL MEDIA CONSUMPTION</td>
<td>19</td>
</tr>
<tr>
<td>E-COMMERCE SHOPPER BEHAVIOR</td>
<td>22</td>
</tr>
</tbody>
</table>
SNAPSHOT
MARKET SNAPSHOT

TOP WEEKLY REACH

- **TV & OUTDOOR**: >80%
- **RADIO**: 76%
- **INTERNET & DAILIES/E-NEWS**: 73%

**NEWS** 19% READ E-NEWS DAILY

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

- **APP**: 15.8 HOURS AVERAGE WEEKLY TIME SPENT ON SMARTPHONES BY INTERNET USERS
- **TV VIEWERS**: 73% TV VIEWERS ARE PAY TV SUBSCRIBERS
- **RADIO LISTENERS**: >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

- **Q4 2016**: 84%
- **Q2 2017**: 94%
- **Q3 2017**: 93%
- **Q4 2017**: 94%

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. Statista.com
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.

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

**THE TRENDSETTER**
- They are trendy, fashion forward & adventurous
- Tend to be students and white collar workers within the age of 19-39 years old in market centers

**THE GO-GETTER**
- The Go-Getter is career oriented and likes to stand out from the crowd
- Tend to be white collar workers living in Kuala Lumpur/ Petaling Jaya market centers and urban areas

**THE PRAGMATIC**
- The pragmatic is price conscious, practical and prefers familiar brands.
- Tend to be Chinese or Indian retirees and housewives in Ipoh and Penang

**THE CONTENTED**
- This group of people are not attracted by the latest trends or swayed by advertisements when it comes to purchasing decisions.
- Tend to be older individuals aged 50 years and above

**THE CARE-FREE**
- The Care-Free do not perceive money as a defining factor of success in their life
- Tend to be non-working adults in market centers with no tertiary education

**THE TRADITIONALIST**
- Conservative, religious, not concerned about the future and focus on living life day by day
- Tend to be blue collar workers with no tertiary education in the northern and eastern regions

Source: Nielsen Consumer & Media View, Jul’16-Jun’17
Base: All people aged 15+ years (17.378 mil)
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There is a break in trend as the CCI was not carried out in Q1 2017.

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

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 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.).

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Reach (Past Week/Month)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dailies/Sundays/e-news</td>
<td>73</td>
</tr>
<tr>
<td>Watch TV</td>
<td>86</td>
</tr>
<tr>
<td>Radio</td>
<td>76</td>
</tr>
<tr>
<td>Internet</td>
<td>73</td>
</tr>
<tr>
<td>Outdoor Advertising</td>
<td>85</td>
</tr>
<tr>
<td>In-store Media</td>
<td>85</td>
</tr>
<tr>
<td>Magazine</td>
<td>14</td>
</tr>
<tr>
<td>Cinema</td>
<td>8, 8, 8</td>
</tr>
</tbody>
</table>

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

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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.
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
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.
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)

**AVERAGE WEEKLY TIME SPENT BY DEVICE**

- Smartphone: 15.8 hours
- PC/Laptop: 11.1 hours
- Tablet: 3.9 hours
- Other devices: 2.2 hours

*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

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 - 19 years</td>
<td>5%</td>
<td>11%</td>
</tr>
<tr>
<td>20 - 29 years</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>30 - 39 years</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>40 - 49 years</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>50 - 59 years</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>60 years and above</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>HHI [RM1 - 2000]</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>HHI [RM2001 - 5000]</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>HHI [RM5001 - 8000]</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>HHI [RM8001 - 10000]</td>
<td>25%</td>
<td></td>
</tr>
</tbody>
</table>

Online shoppers (%)

- **Q2 2016**: 6.7
- **Q2 2017**: 9.9

Average age

- **Online Shopper**: 32
- **All 15+**: 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.

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