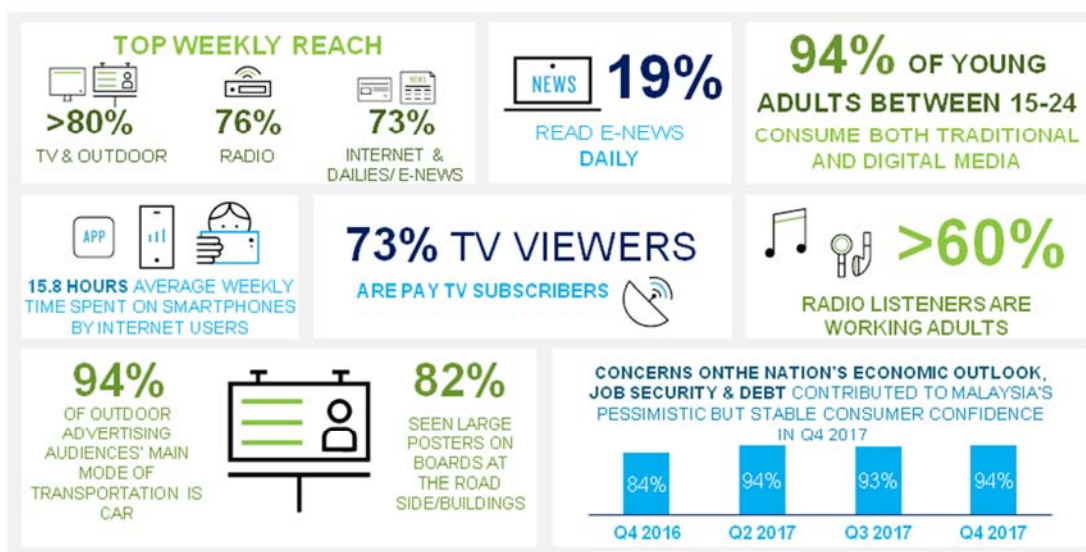


## THE MALAYSIAN MEDIA LANDSCAPE IN 2017

The Malaysian media landscape has shifted over the past couple of years, changing the way Malaysians interact with each other, how they form their opinions and how they make purchase decisions. We are in the midst of an exciting time for Malaysian media, as digital media continues to grow and traditional media innovates to keep pace and stay relevant.



### SNAPSHOT: MALAYSIA MEDIA LANDSCAPE 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

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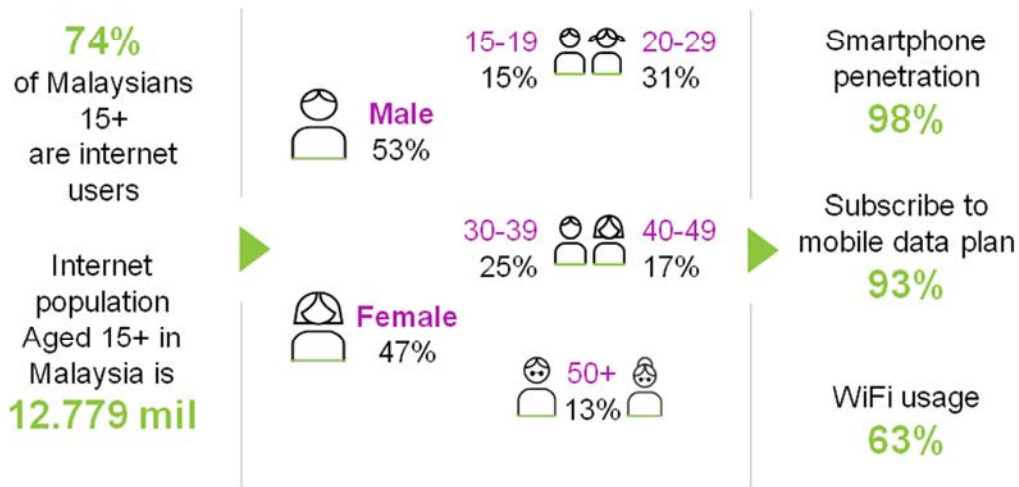
The rise of digital media, however, does not mean that traditional media is no longer relevant in Malaysia. Nielsen Consumer and Media View shows that in 2017, daily newspapers, television, radio, outdoor advertising and in-store media continued to enjoy more than 70% reach across the board.

Significantly, data also showed that more than 90% of young Malaysians between 15 and 24 years old consumed both traditional and digital media; only 1% of this demographic consumed digital media exclusively during the time period.

#### DIGITAL MEDIA - A GAME CHANGER

Digital media consumption continued its year-on-year increase, with a total reach of 73% and a growth of 4% in 2017. Among Internet users, smartphone penetration in Malaysia was high at 98% in 2017, while 93% of those online subscribed to a mobile data plan.

# MALAYSIAN INTERNET USERS – WHO ARE THEY?



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

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It is therefore unsurprising that Malaysian Internet users spend 15.8 hours per week on their smartphones, which is another reason why we believe that mobile adspend will continue to grow as Malaysians increasingly consume digital content using their smartphones.

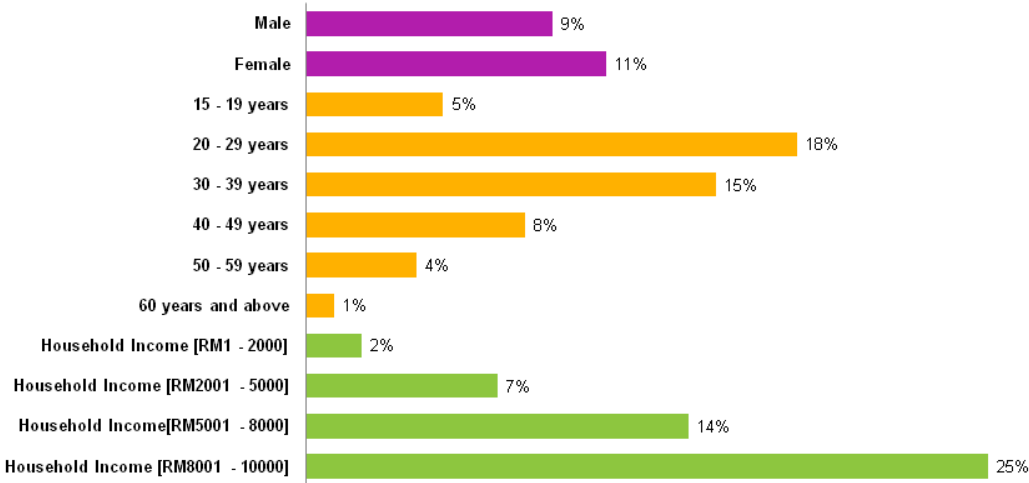
## THE RISE OF THE ONLINE SHOPPER

Increased Internet usage has also positively impacted Malaysia's e-commerce industry. Among the 17.4 million Malaysians aged 15 and above, 10% have shopped for products or services online past month. Online shoppers tend to be younger (the majority are under the age of 39), and among the most affluent (with a household income of more than RM8000) online shopping rises to a healthy 25%.



# MALAYSIAN ONLINE SHOPPERS – YOUNG AND AFFLUENT

Online shoppers 2017



Source: Nielsen Consumer & Media View, Jul'16-Jun'17; Jul'15-Jun'16  
Base: All 15+, purchased product/services online P1M (1.728 mil)

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Source: The Nielsen Company