



Data Highlights

Potential TV Audience Grows 8% in Ramadhan

As in previous years, this year’s Ramadhan also increases the number of television viewers. However, it grows 8% only from an average of 13.4 million people to an average of 14.5 million people (aged 5 years above in 10 major cities in Indonesia), while it increased by 16% last year.

The highest increase is mainly occurred in early morning (2 to 5 am), with more than six times increase from an average of 2 million people last month to an average of 12.2 million people. During early morning, national TV stations add their broadcast time on entertainment programs from a total of 67 hours to 241 hours and on religious programs from 108 hours to 173 hours. Viewers also spend more time to watch entertainment program, in particular comedy and variety show, in early morning. Their watching time increases from only 30 minutes in total last month to nearly 4.5 hours in total during Ramadhan. They also watch serial (sinetron) for one more hour into two hours in total and religious program for almost half hour into 1,5 hours. However the most watched programs in early morning are still dominated by sport program.

Top 5 Program

Period: 1 – 20 August 2011

Daypart: 2 to 5 am

Target Audience: Age 5 years above (TV population: 52,213,275 individual)

Market: Jakarta, Surabaya, Medan, Semarang, Bandung, Makassar, Yogyakarta, Palembang, Denpasar, Banjarmasin

No.	Program	Program Type	Average Number of Audience	Rating (%)
1	SPANISH SC:BARCELONA VS R MA(L)	Sport:Match	1,800,000	3.4
2	OPERA VAN JAVA	Entertainment:Variety Show	1,642,000	3.1
3	PARA PENCARI TUHAN JILID 5	Series:Drama	1,498,000	2.9
4	SPANISH SC:R MADRID VS BARCE(L)	Sport:Match	1,485,000	2.8
5	IFM:GERMANY VS BRAZIL(L)	Sport:Match	1,305,000	2.5

The number of potential audience also increases quite high in the afternoon (4 to 7 pm) which grows 17% to 20.3 million people. In the afternoon, national TV stations increase their broadcast time, especially for religious programs from only 9 hours to 133 hours. Viewers also spend 1.5 more hours into 1 hour 38 minutes to watch religious program. Still the most watched program is children program.

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Top 5 Program

Period: 1 – 20 August 2011

Daypart: 4 to 7 pm

Target Audience: Age 5 years above (TV population: 52,213,275 individual)

Market: Jakarta, Surabaya, Medan, Semarang, Bandung, Makassar, Yogyakarta, Palembang, Denpasar, Banjarmasin

No.	Program	Program Type	Average Number of Audience	Rating (%)
1	SHAUN THE SHEEP	Children:Series Anim/Puppe	2,301,000	4.4
2	DOA HARIAN INDOSAT	Religious:Preach/Dialog	2,167,000	4.2
3	MOTOGP(L)	Sport:Match	2,064,000	4.0
4	DARI SUJUD KESUJUD	Series:Drama	1,916,000	3.7
5	ICE AGE	Movie:Animation/Puppet	1,862,000	3.6

Conversely, the number of potential viewer in prime time (7 to 9 pm) decreases 11% from 28.9 million people to an average of 25.6 million people. During prime time, national TV stations add 42 more hours into 188 hours for sinetron. Nevertheless, viewers do not spend more time to watch sinetron as their watching time stays 6 hours in total. In prime time, the most watched program during Ramadhan is sport program.

Top 5 Program

Period: 1 – 20 August 2011

Daypart: 7 to 9 pm

Target Audience: Age 5 years above (TV population: 52,213,275 individual)

Market: Jakarta, Surabaya, Medan, Semarang, Bandung, Makassar, Yogyakarta, Palembang, Denpasar, Banjarmasin

No.	Program	Program Type	Average Number of Audience	Rating (%)
1	DUEL MP:TIMNAS S VS TIMNAS U(L)	Sport:Match	3,964,000	7.6
2	MAHAKARYA RCTI 22	Special:Special Event	3,064,000	5.9
3	OPERA VAN JAVA	Entertainment:Comedy	2,716,000	5.2
4	ANUGERAH	Series:Drama	2,654,000	5.1
5	THE FA CS:MAN CITY VS MAN UT(L)	Sport:Match	2,556,000	4.9

TV Ad Spending Grows 24%

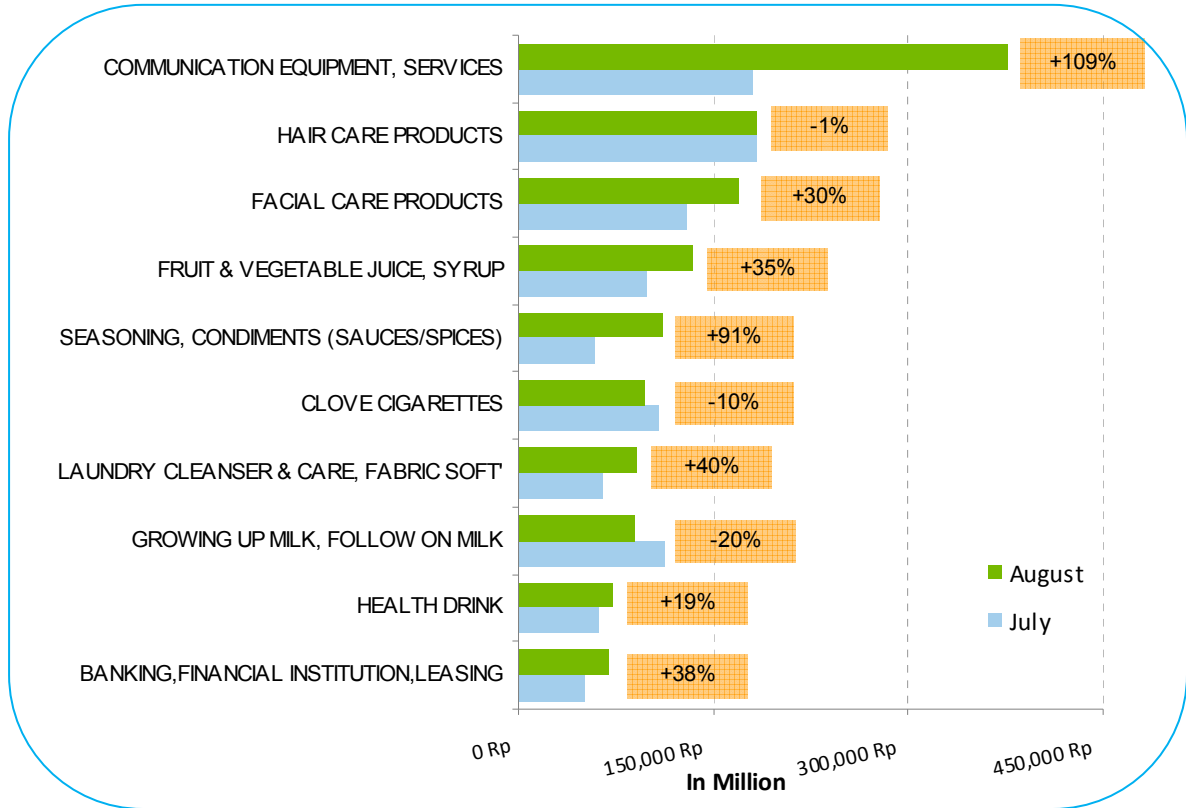
Advertising spending on television during Ramadhan (until August 20th) increases by 24% to Rp 3 trillion. The biggest ad spending contributed to this increase is from Telecommunications category, which rises two times compared to last month to Rp 376 billion. The figure beats Hair Care category which ad spending similar to Telecommunications category last month.

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Top 10 Advertising Spending by Category

Period : 1-20 July 2011 & 1-20 August 2011

National TV, based on gross rate card (without calculating discount, bonus or any sales package applied by the industry), in IDR Million



Four of top 10 ad spenders are telecommunications product. TELKOMSEL - ALL SIM CARD ad spending increases 244% to Rp 66 billion (3826 spots). Meanwhile, EXCELCOMINDO XL - GSM CARD ad spending increases 12-fold compared to the previous month to Rp 53.2 billion (3346 spots), whereas AXIS - GSM SIM CARD increases 35% to almost Rp 46 billion (2187 spots).

Top 10 Advertising Spending by Product

Period: 1 – 20 August 2011

National TV, based on gross rate card (without calculating discount, bonus or any sales package applied by the industry), in IDR Million

Product	Rp 000,000	No. of Spot
TELKOMSEL - ALL SIM CARD	66,059	3826
EXCELCOMINDO XL - GSM CARD	53,166	3346
AXIS - GSM SIM CARD	45,980	2187
POND'S WHITE BEAUTY-SKIN LIGHTENING CREAM	40,583	2167
MARJAN BOUDOIN - SYRUP	39,128	3767
SMS (SHORT MESSAGE SERVICE)	35,681	2228
GULAKU MURNI - SUGAR	35,663	1705
ABC - SYRUP	30,958	2477
INDOSAT-M3 - SIM CARD	30,038	1657
CLEAR SOFT & SHINY - ANTI DANDRUFF SHAM	25,481	1559

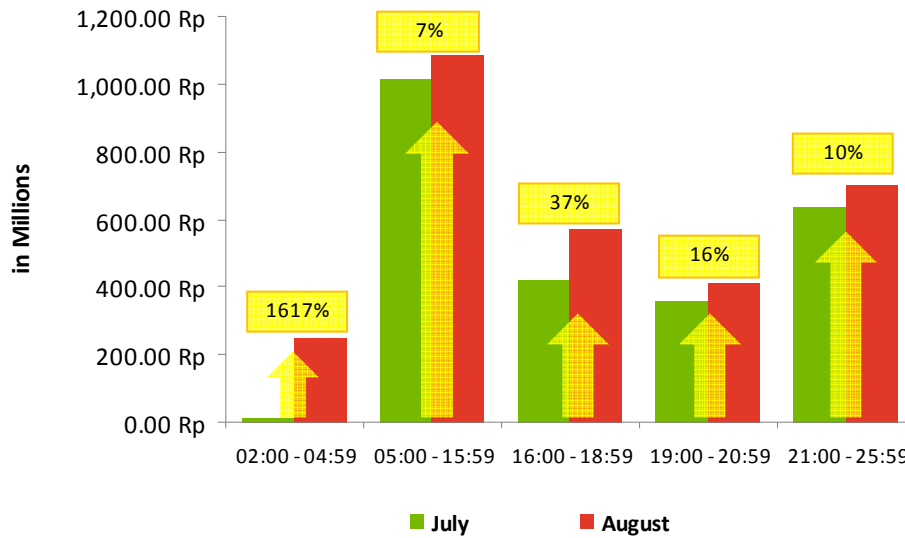
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In terms of day part, ad spending in early morning goes up significantly to almost Rp 250 billion or 17 times bigger than regular day. Telecommunications category increases 70-fold to Rp 56,4 billion, while Hair Care's ad spending raises 28 times to Rp 12,6 billion and Motorcycle's is 40 times bigger to Rp 12 billion.

Advertising Spending by Daypart

Period: 1-20 July 2011 & 1-20 August 2011

National TV, based on gross rate card (without calculating discount, bonus or any sales package applied by the industry), in IDR Million



Meanwhile, the biggest spenders in early morning are TELKOMSEL - ALL SIM CARD (Rp 12.4 billion/626 spots), AXIS - GSM SIM CARD (Rp 11.8 billion/549 spots), and TOP 1 FORMULA 1 ACTION MATIC - OIL LUBRICANT (Rp 5.3 billion/251 spots).*

Data Highlights

Media Advertising Spending Increase 17%

In the first half of 2011, advertising spending in media increased 17% to IDR 33.4 trillion compared to the same period last year. However the growth was a little more sluggish than last year which rose 29% to IDR 28.5 trillion from 2009.

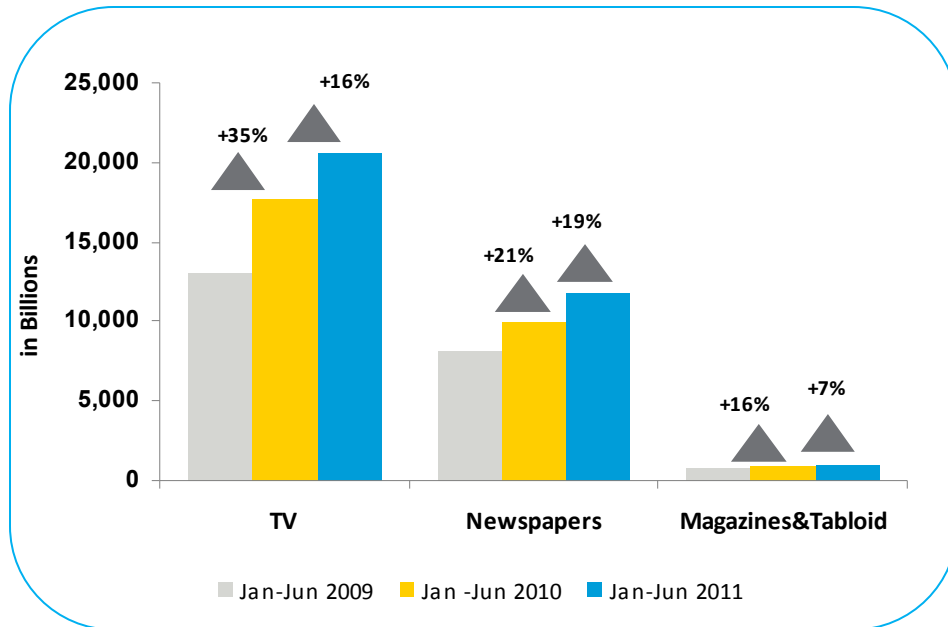
The ad spending growth was smaller, either in television, newspaper or magazine/tabloid. However, newspaper's ad spending grew bigger than television and magazine/tabloid. Ad spending in television increased 16% to 20.5 trillion, while it rose 35% in 2010. Similarly, ad spending in magazine/tabloid grew 7% only to 997 billion, while it increased 16% in previous year. Newspaper is the only medium that shows stable growth with 19% increase to 11,8 trillion, though the increase was slightly smaller than last year.

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Media Ad Spending

Period: January-June 2009-2011

All media monitored, based on gross rate card (without calculating discount, bonus or any sales package applied by the industry), in IDR billion



Yet, television still gained the largest ad spending share (61%), followed by newspaper (36%) and magazine/tabloid (3%). Compared to the first half of 2010, ad share in television declined slightly from 62%, while ad share in newspaper increased from 35%.

In the first half on 2011, Telecommunication category still leads in media ad spending. The total expenditure was IDR 2.6 trillion with the largest portion was spent in television (IDR 1.5 trillion). Government category and political organization was also one of the biggest spenders with IDR 1.3 trillion, which decreased by 4% compared to last year. Corporate advertising and social service was the third biggest spender with almost IDR 1.3 trillion or increased 14% compared to last year. The two latest categories spent most of their advertising expenditure in newspaper, respectively IDR 1 trillion and IDR 893 billion.

Top 5 Advertising Spending by Category

Period: January – June 2010 & 2011

All monitored media, based on gross rate card (without discount, promo, dll), in Rp billion.

Category	H1 2010	H1 2011	Diff. %
COMMUNICATION EQUIPMENT, SERVICES	2,608	2,589	-1%
GOVERNMENT, POLITIC ORGANIZATION	1,370	1,319	-4%
CORPORATE ADS, SOCIAL SERVICES	1,121	1,277	14%
MOTORCYCLES, SCOOTERS, BIKES	835	1,212	45%
HAIR CARE PRODUCTS	880	1,204	37%

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In terms of product, the biggest spender was EXCELCOMINDO XL - GSM CARD (IDR 288 billion) which ad spending was 15% larger than last year, followed by AQUA - MINERAL WATER (IDR 221 billion) which increased its ad spending by 70%. TELKOMSEL KARTU AS - SIM CARD is the third largest spender (IDR 220 billion), though its ad spending increased by 3% only compared to last year.

Top 5 Advertising Spending by Product

Period: January – June 2010 & 2011

All monitored media, based on gross rate card (without discount, promo, dll), in Rp billion.

Product	H1 2010	H1 2011	Diff. %
EXCELCOMINDO XL - GSM CARD	250	288	15%
AQUA - MINERAL WATER	130	221	70%
TELKOMSEL KARTU AS - SIM CARD	214	220	3%
AXIS - GSM SIM CARD	147	218	48%
MOLTO ULTRA - FABRIC SOFTENER	57	209	265%

THE MOST WATCHED BRAND IN AUGUST 2011

PRODUCT	GRP	NO. OF SPOTS
EXCELCOMINDO XL - GSM CARD	7,629	4,270
MARJAN BOUDOIN - SYRUP	7,080	4,270
TELKOMSEL - ALL SIM CARD	6,305	4,384
ABC - SYRUP	6,235	2,841
3(THREE) - SIM CARD	4,005	2,285

1-24 August 2011, All people 5+, Commercial TV, GRP (Gross Rating Points) in %, all commercial products only

