

Data Highlights

- ◆ Ramadhan Shows Draw More Educated Eyeballs 1
- ◆ Terrorist Down, News Ratings Up 2

Opinion

- ◆ Television & Intercultural Communication 3

TAM Around the Globe

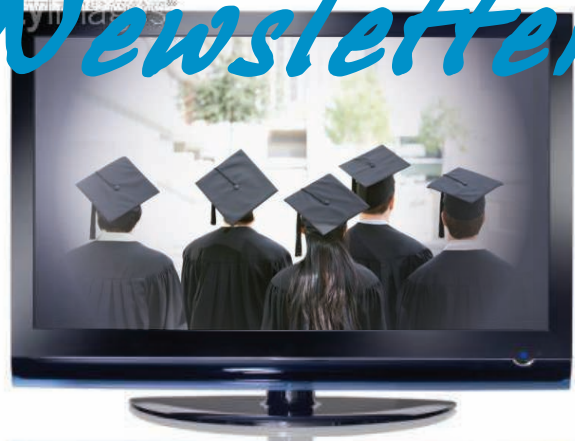
- ◆ Client's Update

- ◆ Most Watched Brand in July 4

AGB Nielsen



AGB Nielsen Newsletter



Top 10 Program, National Channels
 Day part: 4 - 6 a.m.
 Period: August 22-24, 2009
 Target audience: Educated people (university AB class) (TV population: 2,011,478 individuals)
 Market: Jakarta, Surabaya, Medan, Semarang, Bandung, Makassar, Yogyakarta, Palembang, Denpasar, Banjarmasin

Program	Channel	Program Type	Average number of viewer	Rating (%)	Share (%)
PARA PENCARI TUHAN JILID 3	SCTV	Series:Drama	107,000	5.3	23.3
UYA EMANG KUYA(R)	SCTV	Entertainment: Light Entert	91,000	4.6	32.5
SAATNYA KITA SAHUR	TRANS	Entertainment: Comedy	60,000	3.0	19.8
CINTA JUGA KUYA(R)	SCTV	Children:Music/Variety/Light Entertainment	58,000	2.9	20.0
OPERA VAN JAVA	TRANS7	Entertainment: Variety Show	50,000	2.5	16.8
DUNIA KARTUN	TRANS7	Children:Series Anim/Puppe	46,000	2.3	16.1
TAFSIR AL-MISHBAH	METRO	Religious:Preach/Dialog	43,000	2.1	11.3
REPORTASE PAGI	TRANS	News:Hard News	39,000	1.9	17.9
DAHSYATNYA SPC RAMADAN	RCTI	Entertainment: Variety Show	38,000	1.9	13.6
LIPUTAN 6 PAGI	SCTV	News:Hard News	37,000	1.8	24.1

Since children programs are listed on above table besides series, entertainment, and news, we may conclude that educated people accompany their children in watching TV at sahur time. This is rather different than 2008 when sport program dominated the chart in addition to entertainment (quiz and comedy), series, documentary and religious preach programs. Excluding sport program, the program list in 2007 was similar to 2008. Will educated people viewing habit change in this year's Ramadhan? We will find out in the coming days.*

Data Highlights

Ramadhan Shows Draw More Educated Eyeballs

Ramadhan has changed TV viewing habit slightly. During the fasting month, more people watched TV during wee hours, but less during prime time. While on regular days, TV viewers are concentrated on prime time. The same habit is also seen among educated people (who has university education background and categorized into upper class) who usually spend even fewer hours to watch TV. How do they manage their TV time during Ramadhan?

In general, number of educated people who watch TV is much smaller than general people (5+), both in regular days and in Ramadhan, in 10 survey cities. Even so, Ramadhan has elevated their viewing. In 2007, the number of educated people who watched TV increased 8%, relatively small compared to all people which soared by 20%. But, in 2008 when the number of all people increased 18%, the total of educated people went up 24% from regular days.

Looking at their viewing habit during Ramadhan in the last two years, more educated people watched TV at sahur time and fasting break time. Their highest viewing was at 3 to 4 a.m. and 6 to 7 p.m., which was also similar to the viewing habit shown by all people.

In both periods, total rating of educated people was lower than all people almost in all time. However, in the first three days of Ramadhan in 2009, total rating gained by this group (14.8% or similar to 298,000 people) among national channels is higher than all people (12.6 or approximately 5.9 million people) at 4 to 6 a.m. During the time, the most watched programs among educated people vary; mostly are entertainment (light entertainment and comedy) and children programs.

TRAINING AGENDA

Arianna From 9.30AM to 12PM
 Subject: Viewing Behavior for beginner
 Mon, Sept 14, 2009

Subject: Post Evaluation for beginner
 Mon, Sept 28, 2009

TAM Methodology
 Mon, Sept 14 & 28, 2009
 From 2PM to 4PM

Please register to our Client Service.

Data Highlights

TERRORIST DOWN, NEWS RATINGS UP

Again, news programs attracted audience successfully when the ambush of the bombing perpetrator who was alleged Noordin M. Top in Temanggung (Central Java) in early August was brought on the air by several TV stations. News audience that is usually dominated by male above 40 years old from upper socio-economic class, during the ambush, opened out to the younger age of 30-39 years.

In this group (male 30 + AB), the number of audience increased 168% from previous week from 22,000 people to 59,000 people in 10 survey cities. The average rating of news program since Friday (07/08) to Sunday (09/08) rose from 0.9 (%) to 2.4 rating points. The biggest rating point increase was seen at 6 until 10 a.m. that were up more than 500% from an average of only 0.8 (similar to 21,000 people) to 5.1 (equivalent with 128,000 people) which was mainly contributed by Saturday (08/08) news program which reported the death of the terrorist, who was suspected to be Noordin. Contributed mostly by news viewers at 6 to 7 a.m., news program rating reached a whopping average of 6.0 or similar to 151,000 people on that day.

During those three days, *Breaking News* (rating 6.0), *Kabar Petang* (4.6) and *Kabar* (4.5), all were broadcast by TVOne, watched by most of the news audience. Here are the news programs that successfully reached the most news viewers:

Top 10 News Program, National Channels

Daypart: All time

Period: August 7-9, 2009

Target audience: Male 30+ AB (TV population: 2,516,460 individuals)

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

Program	Channel	Program Type	Average number of viewer	Rating (%)	Share (%)
BREAKING NEWS	TVONE	News:Special News	150,000	6.0	35.2
KABAR PETANG	TVONE	News:Hard News	117,000	4.6	21.6
KABAR	TVONE	News:Special News	113,000	4.5	18.5
KABAR SIANG	TVONE	News:Hard News	88,000	3.5	22.4
SEPUTAR INDONESIA	RCTI	News:Hard News	81,000	3.2	18.5
TOP NINE NEWS	METRO	News:Hard News	79,000	3.1	12.3
BREAKING NEWS	METRO	News:Special News	77,000	3.1	20.6
REPORTASE SIANG	TRANS	News:Hard News	72,000	2.9	28.2
REPORTASE SORE	TRANS	News:Hard News	64,000	2.5	17.3
METRO HARI INI	METRO	News:Hard News	64,000	2.5	12.4

Most TV stations gained more news viewers during those days. However, TV stations with most successful news programs performance were Metro TV and TVOne. With most eyes glued on the live report of the terrorist fall, both TV station increased their news program average rating by 440% (to be 2.7 or similar to 67,000 people) and 231% (to be 4.3 or 108,000 people) respectively.*

Opinion

Television & Intercultural Communication

The advancement of communication technology does not make face-to-face communication unimportant, since this type of communication is the most perfect one yielding closeness and empathy among human beings. Face-to-face communication is believed to be able to overcome feelings of alienation, dissatisfaction, marginalization, or a feeling that "this place has really gotten impersonal" (Pace & Faules, 1994). Therefore, business people will still need to meet and negotiate in face-to-face situations, although they will also use sophisticated communication means such as computers and cellular phones. The successful twenty-first managers, as Richard Lewis (1996) argues, are those who are culturally sensitive and possess strategies to get over cultural differences when communicating with foreign business people.

In the post cold war era, important differences among nations are not ideological or economic, but cultural in nature. People have greater needs to define themselves based on their ancestry, language, religion and customs. Nations involved in globalization do not adhere to a single ideology, but strive to search for their ethnic-regional values (Huntington, 1996). The resurgence of religions in the third millennium as predicted by Naisbitt and Aburdene (1990), the impact of which has been apparent for the last decade, will reinforce those cultural differences. As trade and industrial relations progress, these cultural and religious differences will influence international business practices.

As illustrations, you can call American business people by first names as soon as you meet them, but do not do that when you encounter German or Italian managers. In Germany or Italy, managers who have (academic) titles are addressed "Professor ...," "Doctor...," "Herr Muller," and "Signor DiLivio." In England or the United States, it does not matter to tell a joke when attending a business meeting. But you will be considered as frivolous if you do so in Germany or Japan. American and German business people will think that you are unethical if you suddenly cancel or break a business contract, while according to Japanese business people, it is

the Americans and the Germans who are not ethical if they insist on the contract, while everything has changed. The silent Japanese do not like the argumentative Americans, while those Americans will make a serious mistake if they interpret the Japanese responses by looking at their facial expressions, since Japanese often hide their feelings regardless of their facial expressions.

Clearly intercultural, verbal and nonverbal communications are very complex. With regard to the tendencies described above, theoretical knowledge and practical global guides on intercultural (business) communication need to be taught to Indonesian business people and executives so that they are able to work and communicate cross-culturally when they enter the free trade era of the twenty-first century. By so doing, they will be more sensitive toward cultural differences, and will be able to prepare business messages and anticipate how foreign business people will respond to their messages and behaviors. This cultural mastery will in turn lead to their successful business.

These cross-cultural studies will give us some understanding of how to utilize cultural differences and similarities between us and our foreign business counterparts. The studies can be conducted through further studies in educational (higher) institutions, training programs, workshops, seminars, and dissemination of information on the relevant fields via mass media, including television. Unfortunately, so far there has been no such intercultural communication programs offered by our private television, albeit its relatively long existence. I believe this kind of program will attract some viewers interested and involved in communication with people from different cultures, including expatriates who live in Indonesia. Certainly the programs can be designed in various forms, be it a talkshow, a feature film, a soap opera, or simply a comedy.*

*Prof. Deddy Mulyana, Ph.D., Dean and Professor - Faculty of Communication Science, Padjadjaran University, Bandung

TAM Around the Globe



2009, 2010 'likely to be golden years' for satellite and cable TV business - Satellite and cable TV businesses in Thailand will consider 2009 and 2010 to be the golden years, Satellite Television Association of Thailand president Adisak Limparungpattanakit said.

"Businesses have received great support from regulations granting business licences, as well as independent local cable TV rating measurements," he said. He said 2025 new satellite TV channels were expected to start up annually this year and next and that in the next five years, the cable TV audience would increase to that of free-to-air channels. There are 3 million cable subscribers nationwide using a fibre optic system.

Media survey house AGB Nielsen Media Research (Thailand) has joined with 15 cable channel operators to pilot the cable TV ratings. Between last August and this past May, a survey was conducted of 100 households: 20 in the >>

Client's Update

Most Watched Brand in July

Product	GRP	No. of Spots
CALON PRESIDEN&WAKIL PRESIDEN	4,001	3,247
MARJAN BOUDOIN - SYRUP	3,621	2,230
SEDAAP - INSTANT NOODLE	3,522	2,185
RINSO - POWDER DETERGENT	3,108	2,286
BENDERA - ALL GROWING UP MILK	2,902	2,319

TV commercials, GRP (Gross Rating Points) in %, all commercial products only

greater Bangkok area and 80 upcountry.

The survey found that on weekdays, people spent more time watching cable than free channels, except from 9 p.m. to midnight, when viewers watched mostly free channels. On weekends before 6 p.m., people generally switch back and forth between free and cable channels about equally.

Source: nationmultimedia.com

Nielsen: Ad Minutes Added To Prime Time In '08 in U.S. - Broadcast networks produced a 3.5% increase in the number of combined commercial minutes in prime time last year -- a sign that networks may be forced to squeeze in more spots to keep revenues growing. Nielsen figures show that the total rose to 5,688 minutes in 2008, topping the total of 5,492 the year before.

While prime time saw a notable boost, daytime commercial minutes were about flat, with a total of 3,811 increasing less than 1% over 2007. Daytime covers 10 a.m. to 4:30 p.m.

The figures span the range of English-language broadcast networks, including CW, MyNetworkTV and Ion. Cable is excluded. Only national-network spots are counted. Local breaks, promos and direct-response ads -- all of which contribute to the proverbial clutter -- are not.

When prime-time and daytime commercial minutes are combined, the 2008 total increases 2.5%. That is close to the 3.5% increase in total revenues (to \$17.23 billion) for the Big 4 networks in 2008, according to Universal McCann. While adding commercials can increase revenues, networks may be airing more to provide make goods to advertisers as ratings decline.

Source: mediapost.com

Nielsen: Only 1.3% Of U.S. Homes Digitally Unready - TV viewing levels did decline right after the digital switch on June 12, but have since returned to previous levels, according The Nielsen Company.

The decline in viewing was largely temporary; in recent weeks, it has seen audiences returning, as more homes have added converters. Nielsen notes that as of June 28, 60% of completely unready homes -- about 1.7 million -- are able to view some television by watching a low-power station, a foreign station near the Canadian or Mexican borders or a U.S. broadcast station that is available to them via a "translator."

According to Nielsen, that means television viewing in these homes has not disappeared completely, although viewing choices are extremely limited.

Nielsen now says the number of completely unready homes stands at only 1.3% of the U.S. TV homes, or 1.5 million television households. Of those TV sets that became digitally ready just prior to June 12th, 77% were connected to a digital converter box, 19% to cable and 4% to satellite. Nielsen says this is a big change from the earlier TV transitions, where the majority signed up for cable or satellite distribution.

Sara Erichson, president, Media Client Services North America, The Nielsen Company, says in the blog: "In sum, the digital transition seems not to have had a major impact on viewing levels. People still watch a significant amount of television, and we believe the small number of households that remain without digital television will eventually make the switch-over from analog television." Source: mediapost.com

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