

SOUTHEAST ASIA
DIGITAL
FUTURE IN FOCUS
2013



Key Insights and Digital Trends from Southeast Asia

Executive Summary

Media fragmentation is occurring at light speed in today's multi-platform environment, which features not only computers, but smartphones, tablets, gaming platforms and a seemingly ever-increasing number of emerging devices.

The strong swelling of mobile audiences, devices and consumption habits have shown us that consumers have become more platform agnostic in their digital media consumption and happily switch devices throughout the day and into the night to stay up to date on email, news, social media etc.



comScore has been preparing for a future scenario where most people will consume content on the go and PCs would no longer be the centre of the digital universe. This future is quickly becoming a reality.

The following report examines how the latest trends in web usage, online video, mobile and search, social and shopping are currently shaping the UK digital marketplace and what that means for the coming year, as comScore helps bring the digital future in focus.

FOR FURTHER INFORMATION, PLEASE CONTACT:

A Singh
worldpress@comscore.com

Key Takeaways

More than 40% of internet users come from APAC

Internet user numbers across APAC continue to grow at a much greater pace than any other market. Six countries from Southeast Asia is home to an online population in excess of 62 million.

Growth driven by younger power users

Users from Thailand and Vietnam record the highest time spent online which is clearly explained by a significantly large percentage of population under the age of 35.

E-commerce starts to make a move

Local and regional online retail setups are beginning to capture the Southeast Asian online audience. In the online travel category, low cost airlines and meta-search platforms see healthy traffic.

Social networking still captures majority of screen time

Social Networks capture the largest percentage of consumers' time in the region. Facebook continues to be the number one social network with 3 of its top 15 markets by reach in Southeast Asia. Twitter, LinkedIn and Tumblr are the other established players in most markets.

Entertainment and online video continues to grow

The online video audience in Southeast Asia grew around 8 percent in the past year, YouTube continues to be the top video property in all markets. Music, movies and entertainment sites get more visitors and time spent than global averages.

Content

SETTING THE SCENE

Global Overview

[5](#)

Southeast Asia Landscape

[9](#)

2013 SEA FUTURE IN FOCUS

Digital Audience Behaviour

[14](#)

Social Networking

[20](#)

Online Retail

[26](#)

News and Information

[31](#)

Online Travel

[35](#)

Entertainment and Online Video

[39](#)

Search

[46](#)

Country Spotlights

[50](#)

Conclusion

[57](#)

Tweet-bits

[61](#)

Methodology

[62](#)

About comScore

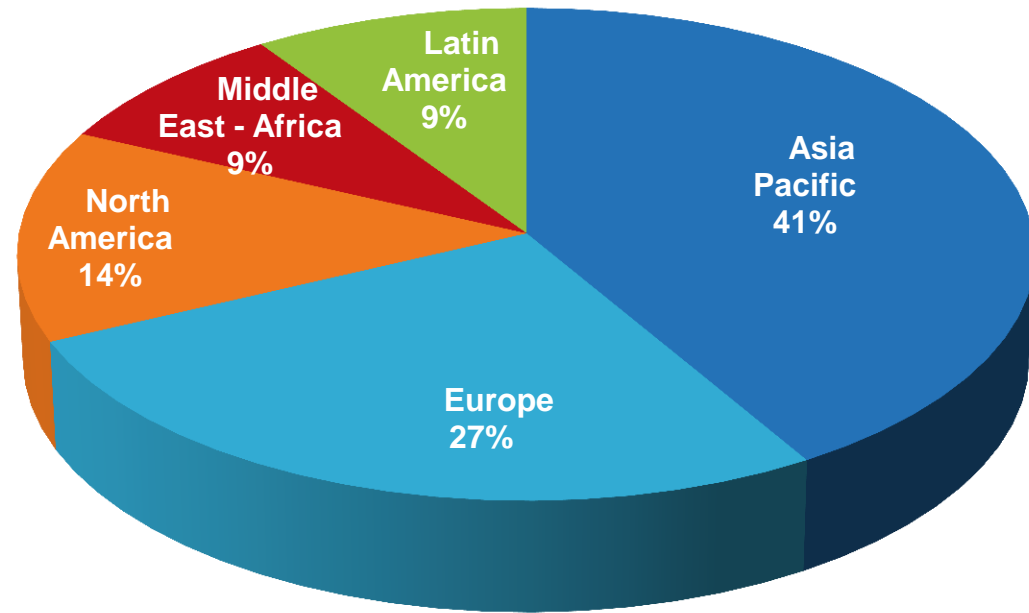
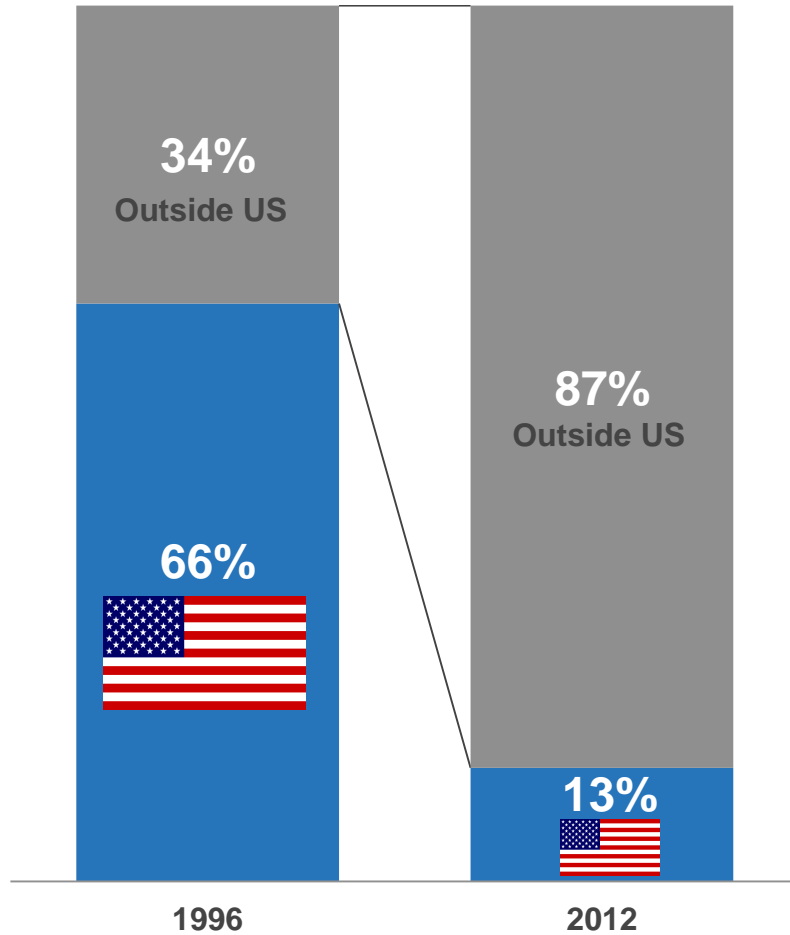
[64](#)

#FutureinFocus

GLOBAL OVERVIEW

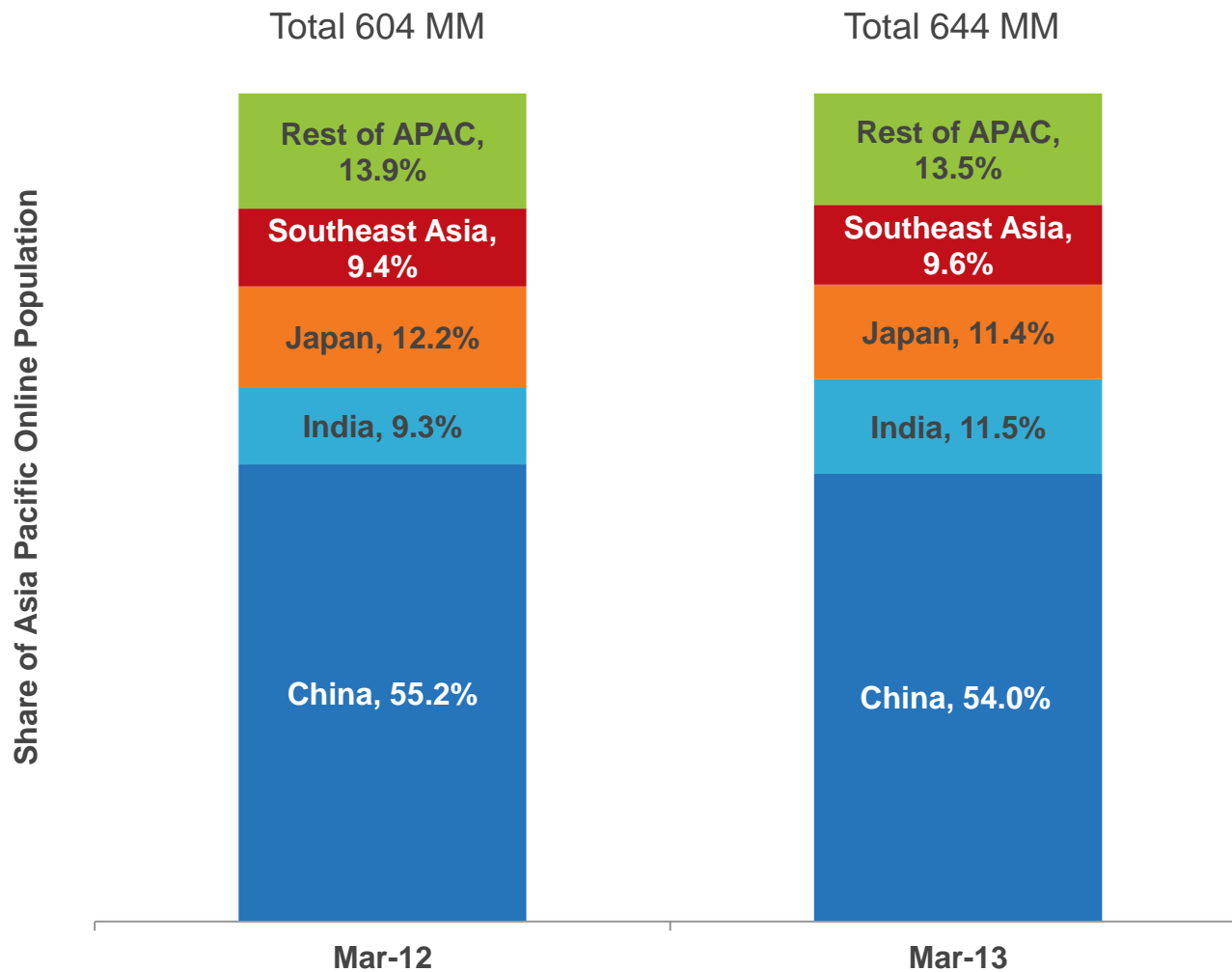
Distribution of Worldwide Internet Audience

The US is no Longer the Center of the Online Universe



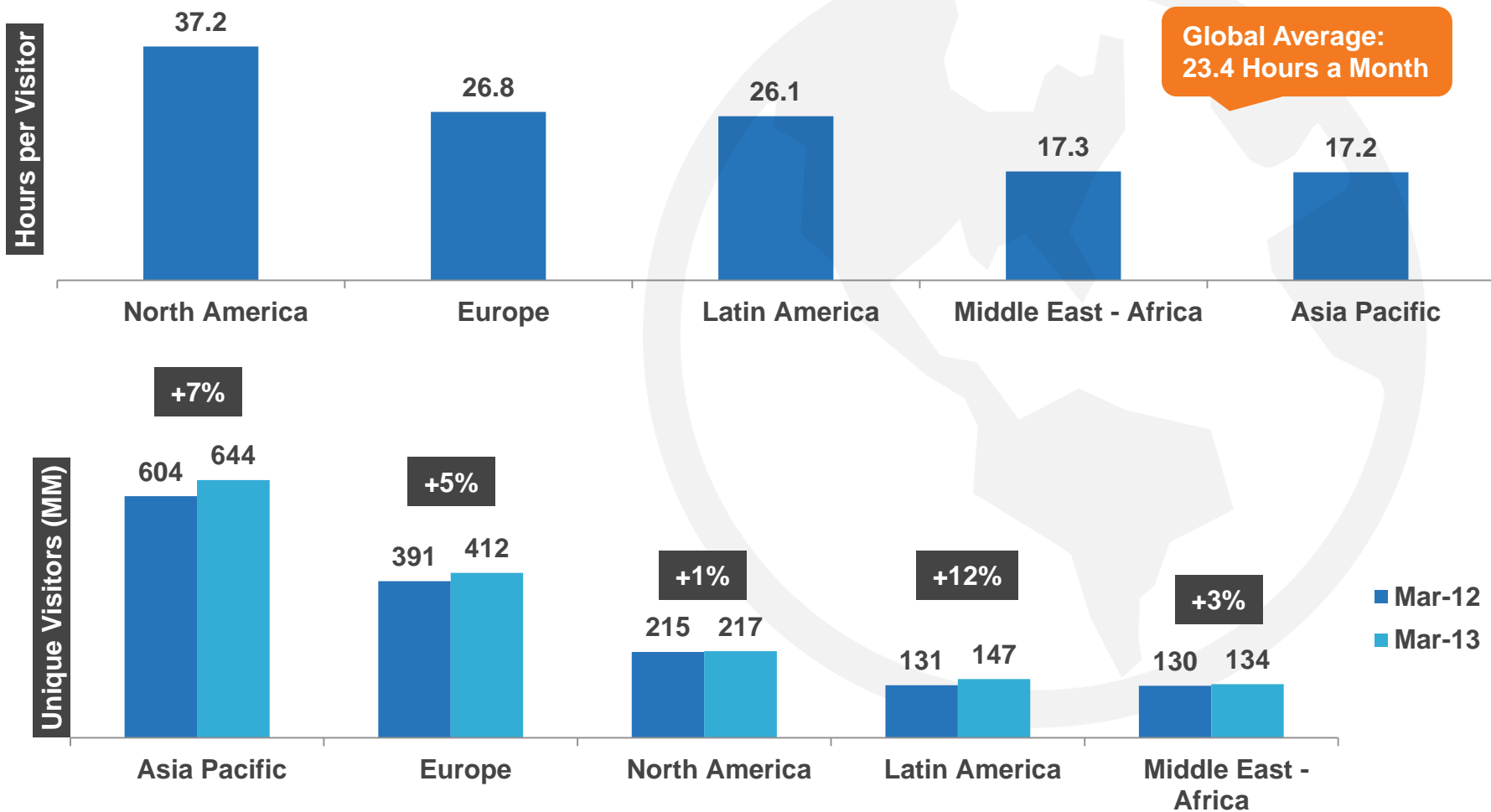
Southeast Asia online population in excess of 62 million

Grows at a healthy 9% in the last year



Time Spent and Growth Across Regions

US Users Spent Most Time, Whilst Asia Pacific Outgrows Rest of the World

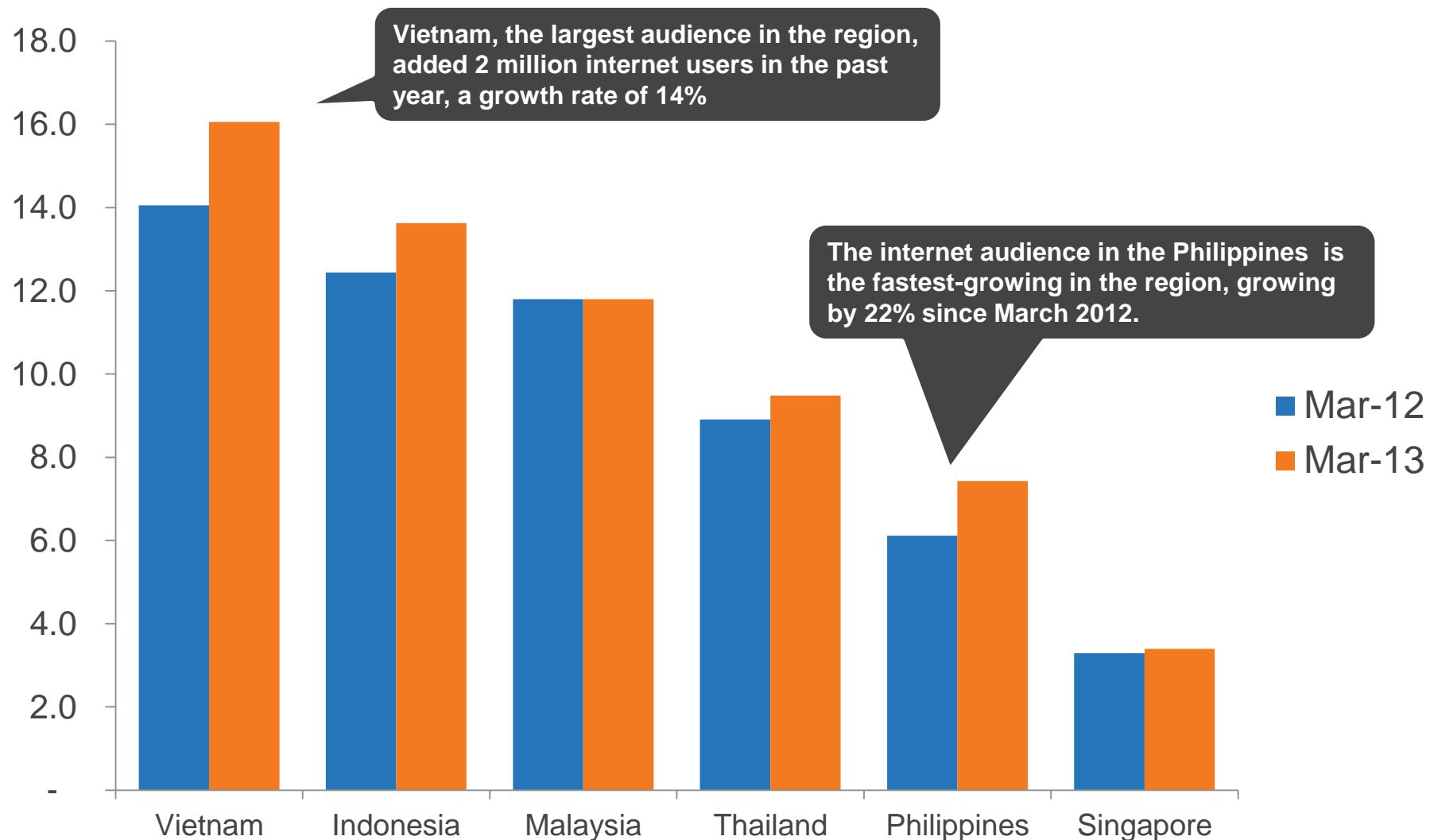


#FutureinFocus

SOUTHEAST ASIAN **ONLINE** LANDSCAPE

Online Audience in Southeast Asia

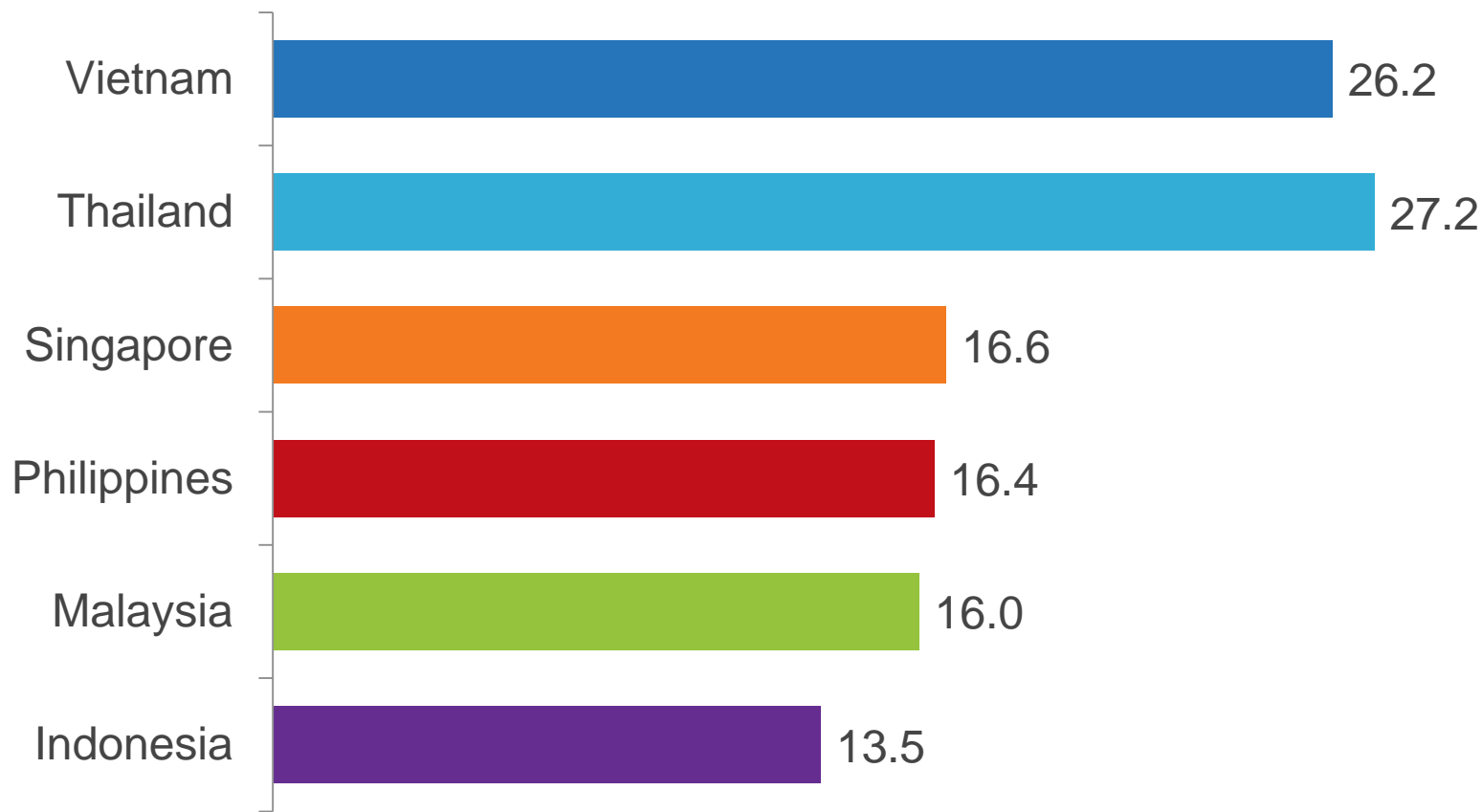
High Growth in Developing Regions



Engagement Across Southeast Asian Audiences

Users in Thailand and Vietnam Spent the Most Time Online

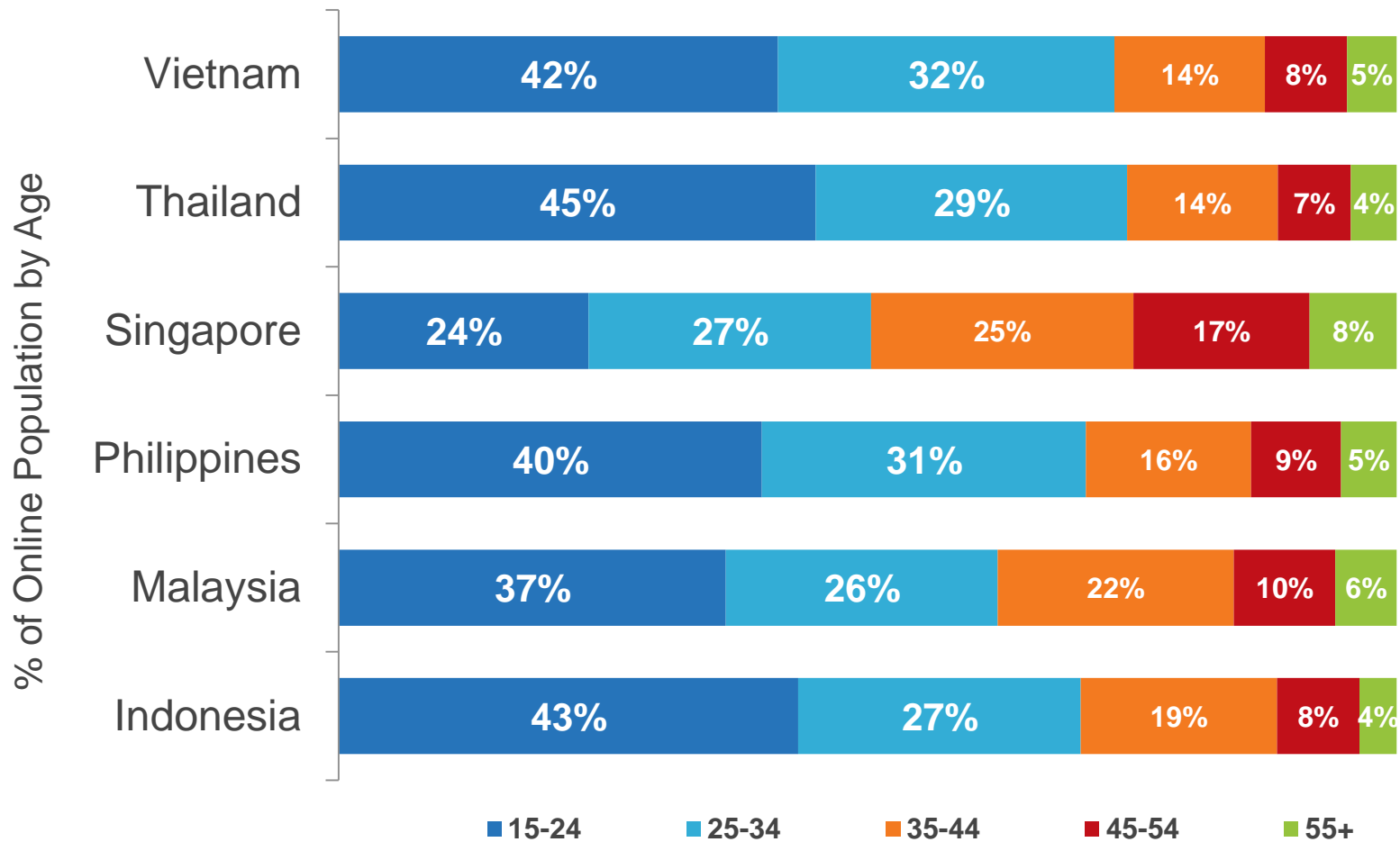
Average Time Spent Online (Hours)
March 2013



Demographic Distribution of Southeast Asian Audiences

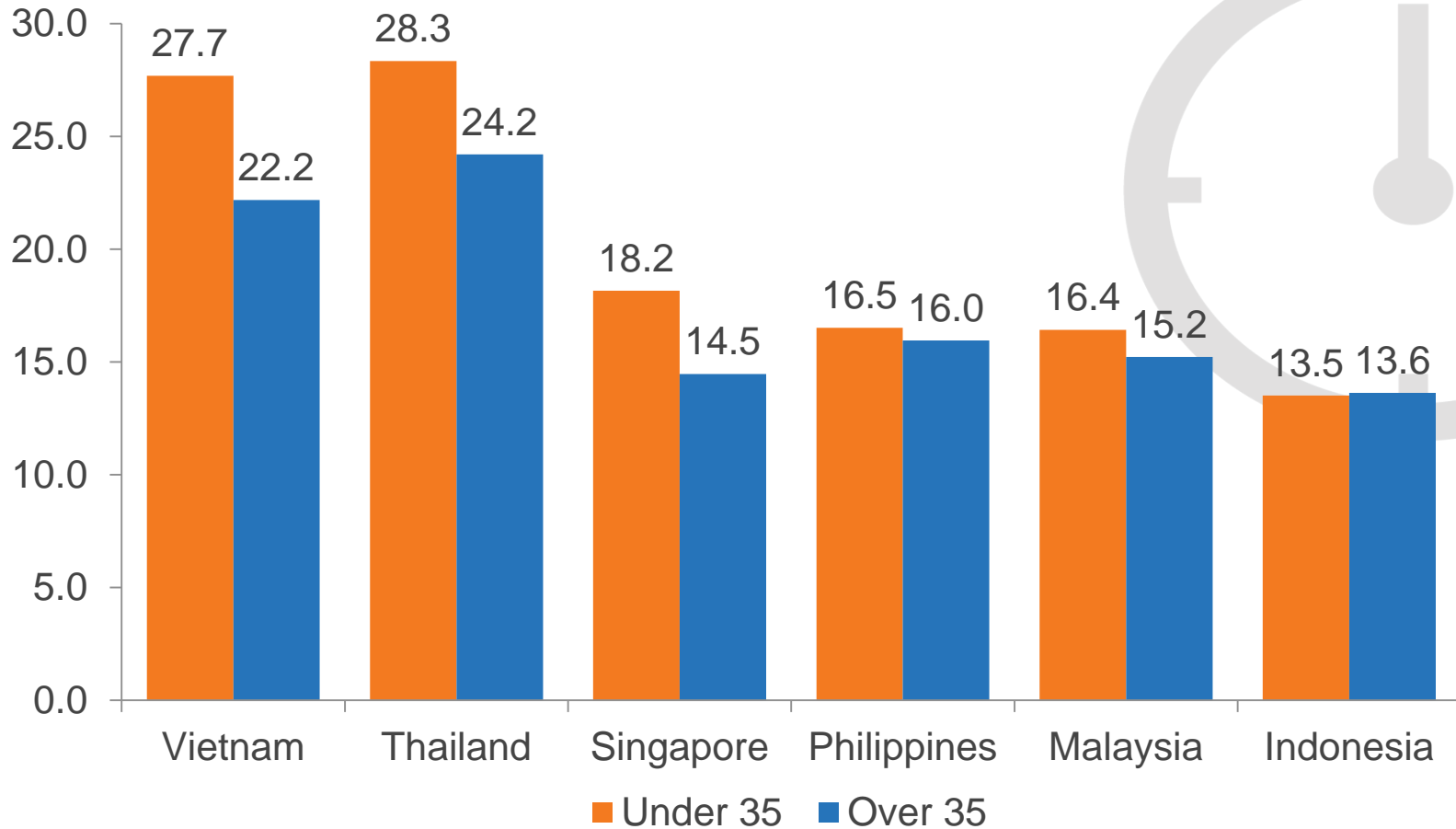
Emerging Internet Markets in the Region Skew Very Young

In Thailand and Vietnam, 74% of the audience is under 35



Youngest Web Users Are Heaviest Web Users

Average Usage by Under-35s is Substantially Heavier in Vietnam, Thailand

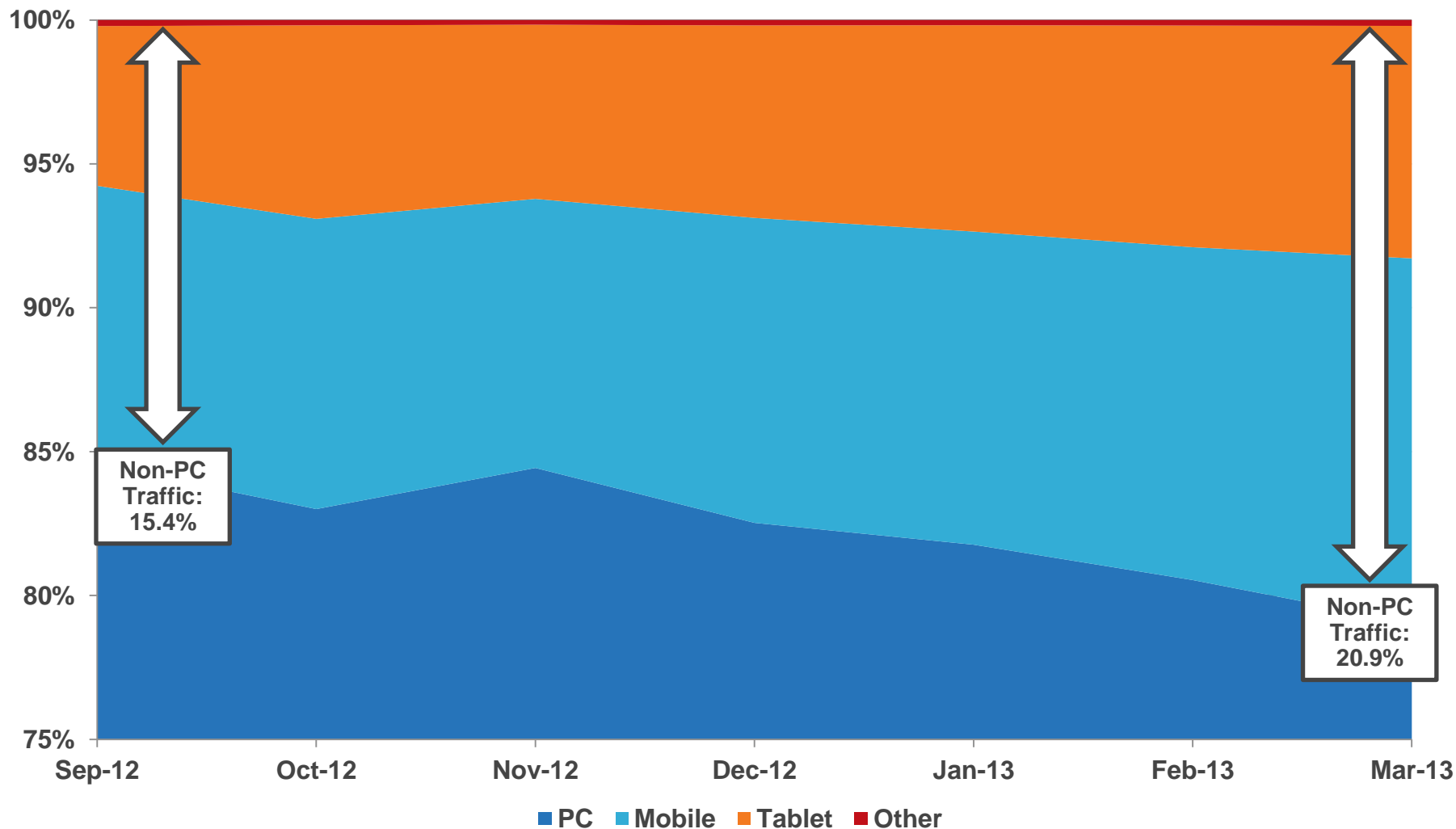


#FutureinFocus

DIGITAL AUDIENCE BEHAVIOUR

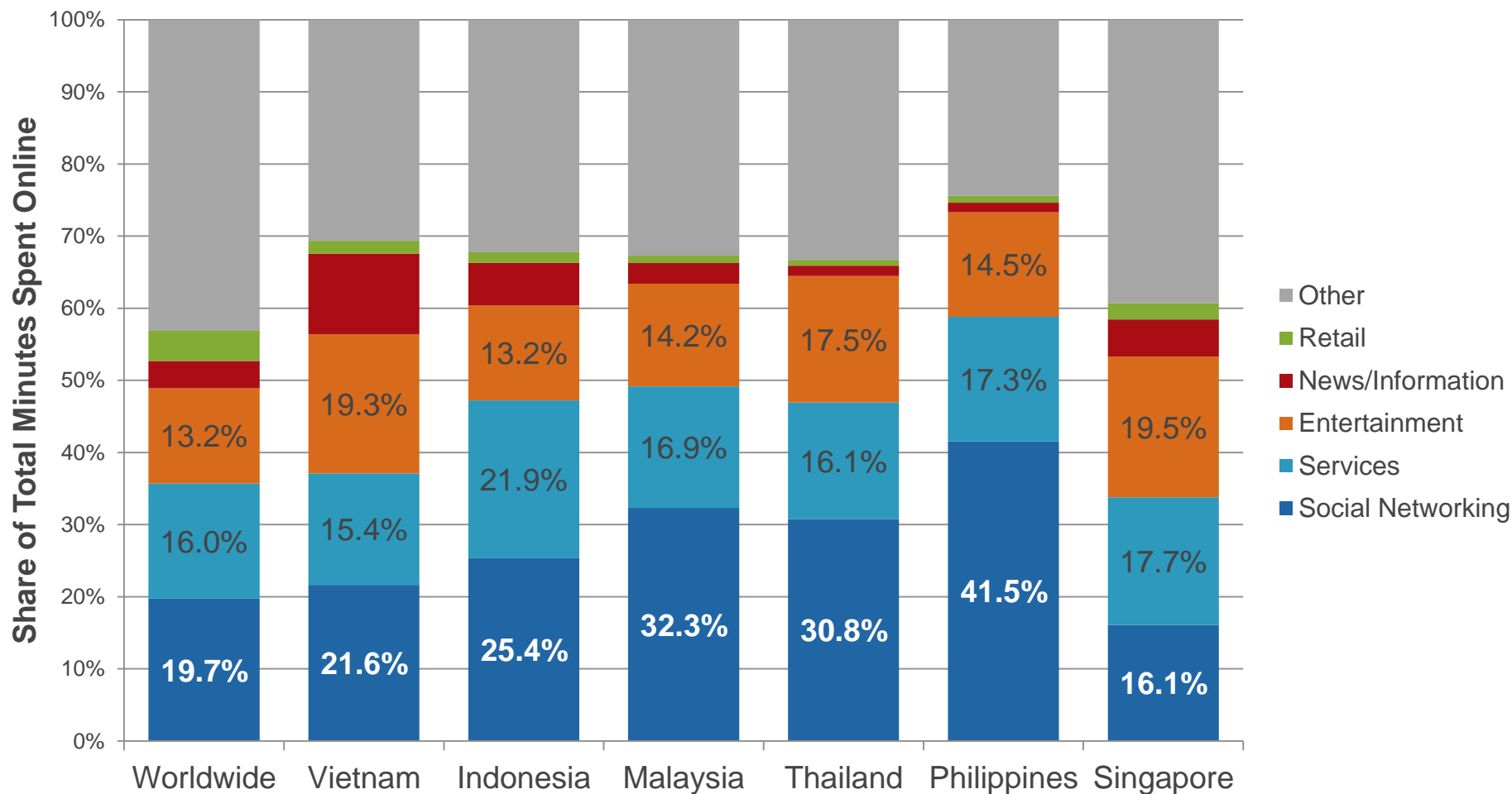
Non-PC traffic in South-East Asia zooms ahead, in excess of 20%

This number is accelerating with each passing month



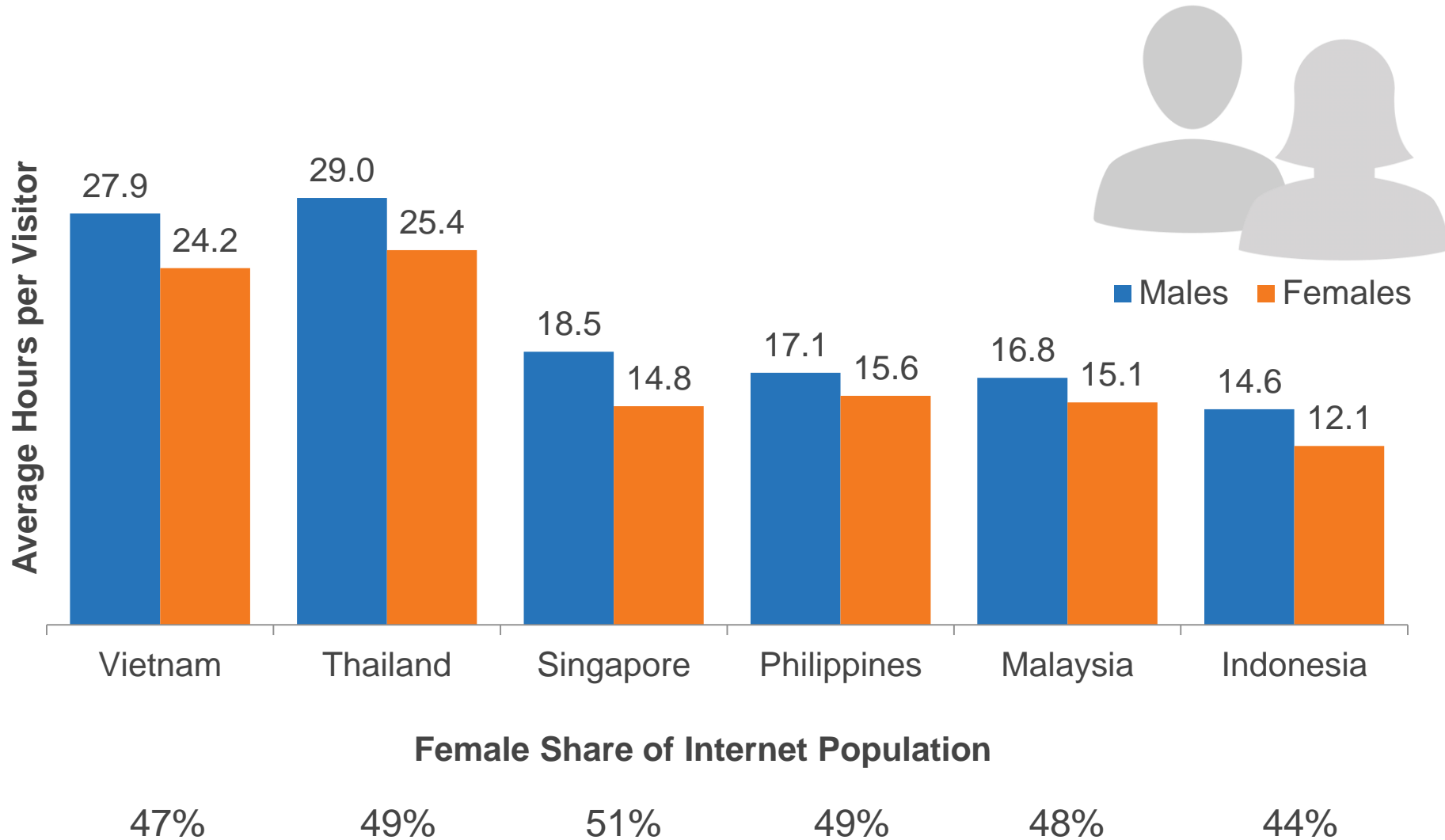
Social Networking Captures Large Share of PC Screen Time in SEA

Share of Time Spent on Services (Email, IM) Also Significant




Males in the Region Spend More Time Online than Women

Differences in Usage Largest in Vietnam, Thailand, and Singapore



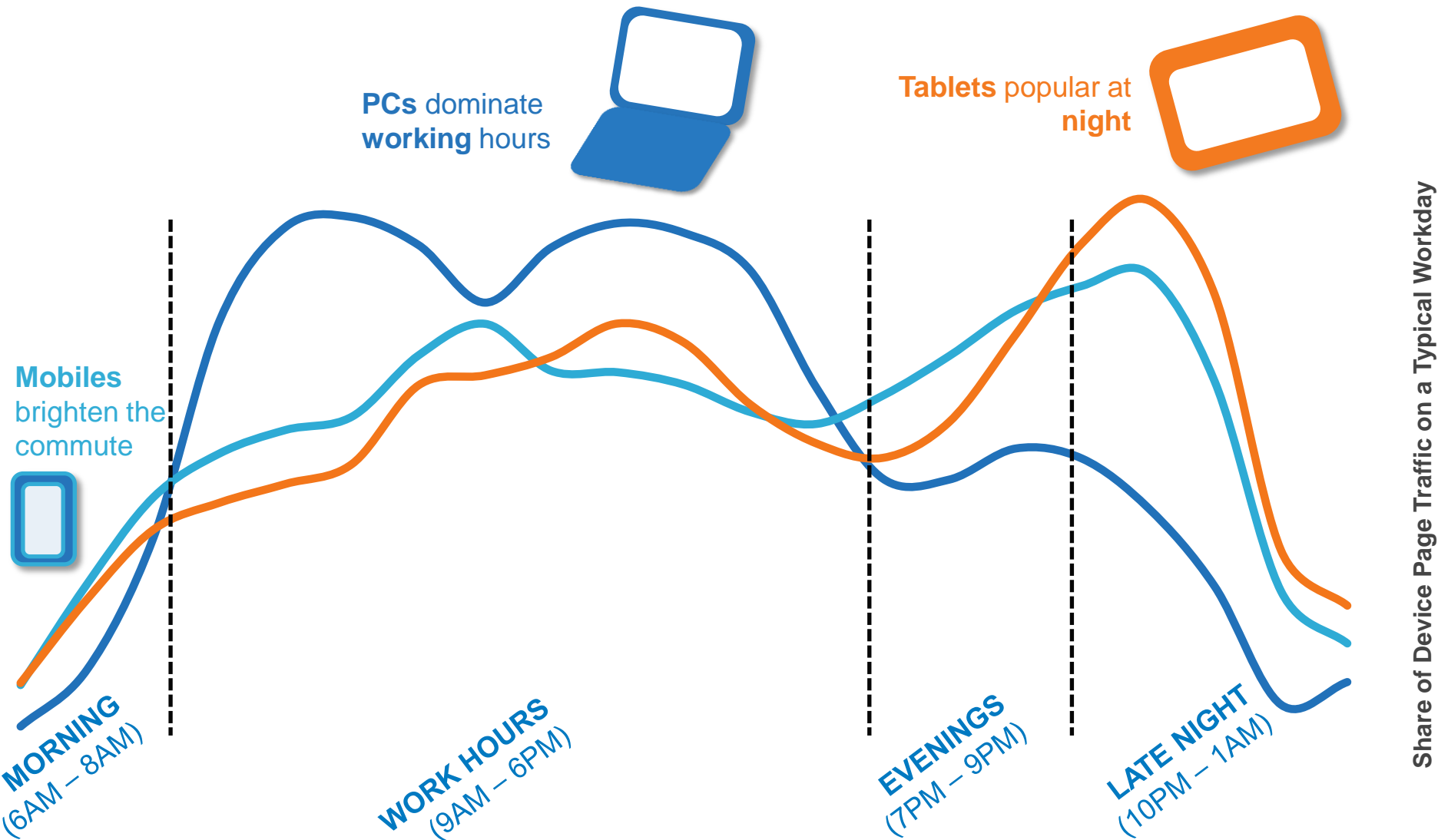
Globally, Women are More Likely to Visit Family, Home, and Retail Sites; Men Gravitate Towards Sports, Auto, and Technology

 (Highest) F-to-M Reach Index	
	Fragrances/Cosmetics 168
	Flowers/Gifts/Greetings 152
	Lifestyles - Food 140
	Department Stores 137
	Jewelry/Accessories 137
	Teens 133
	Family & Parenting 130

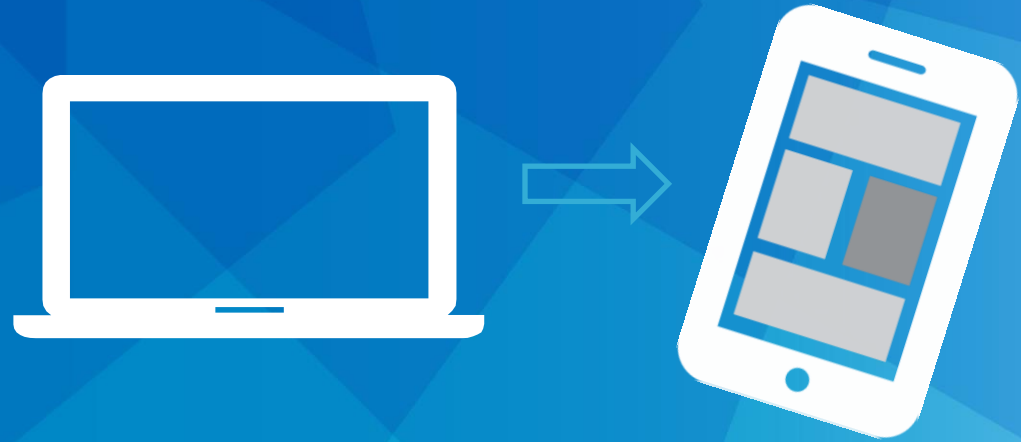
 (Lowest) F-to-M Reach Index	
	Politics 78
	Technology - News 78
	Automotive 77
	Gaming Information 76
	Online Gambling 75
	Sports 74
	Online Trading 69

Device usage varies significantly by time of day

PC's take up work hours, while tablets rule evenings



#FutureinFocus

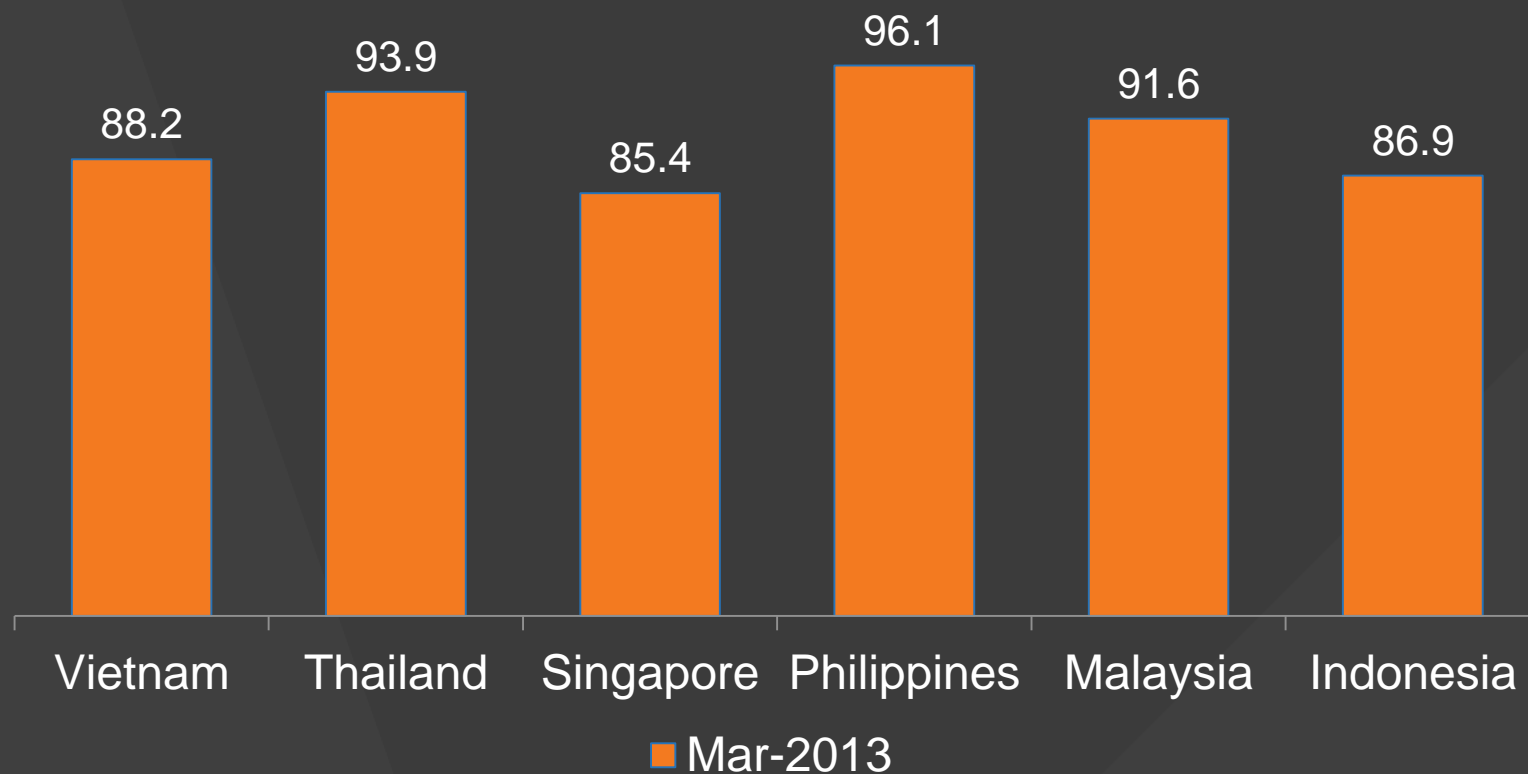


SOCIAL NETWORKING

Social Networking Category Captures the Largest Percentage of Consumers' Time in Southeast Asia

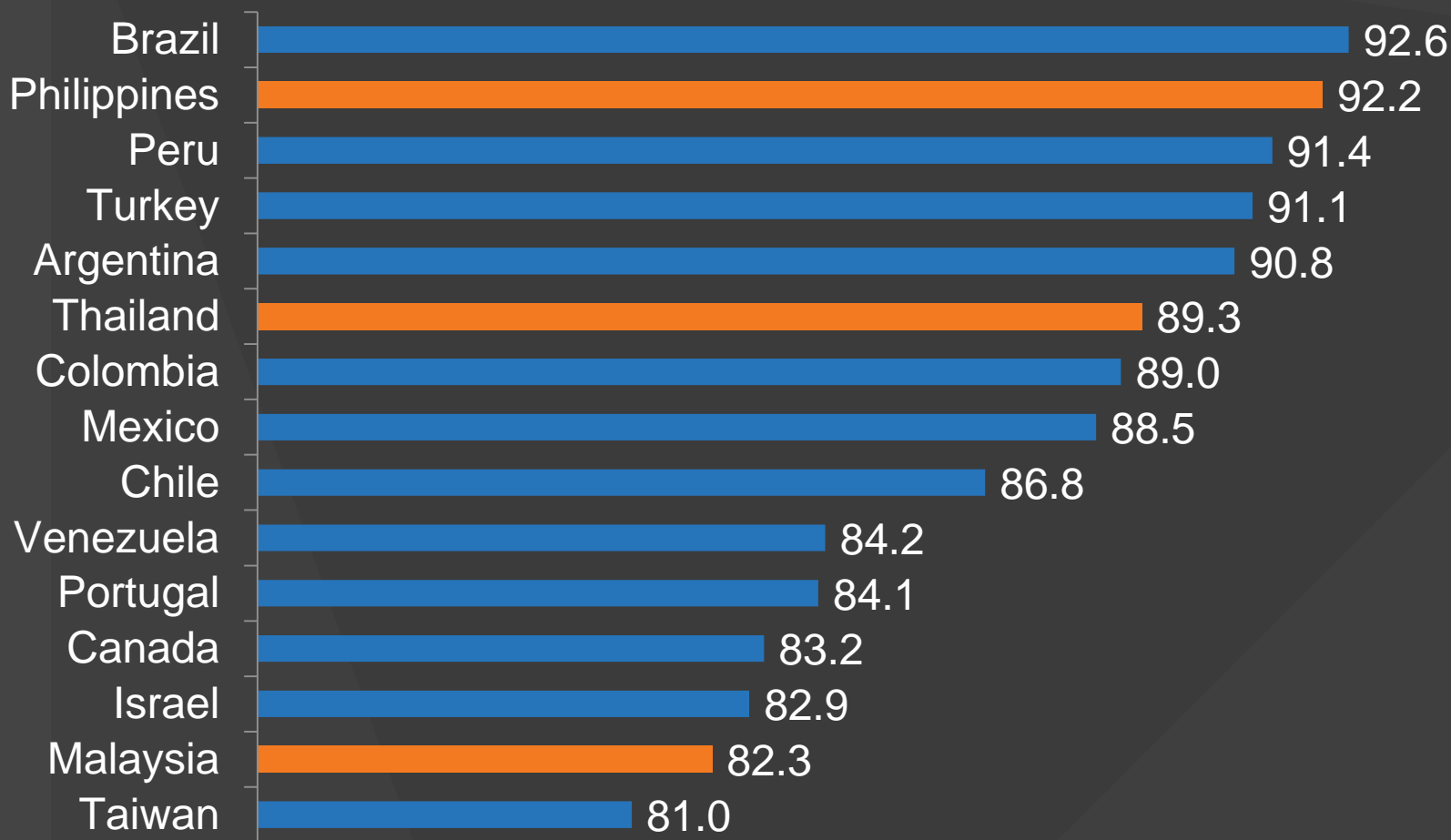
Percent of Web Users Visiting a Social Networking Site

All SEA Countries Index Higher than Worldwide average reach of Social Networking sites

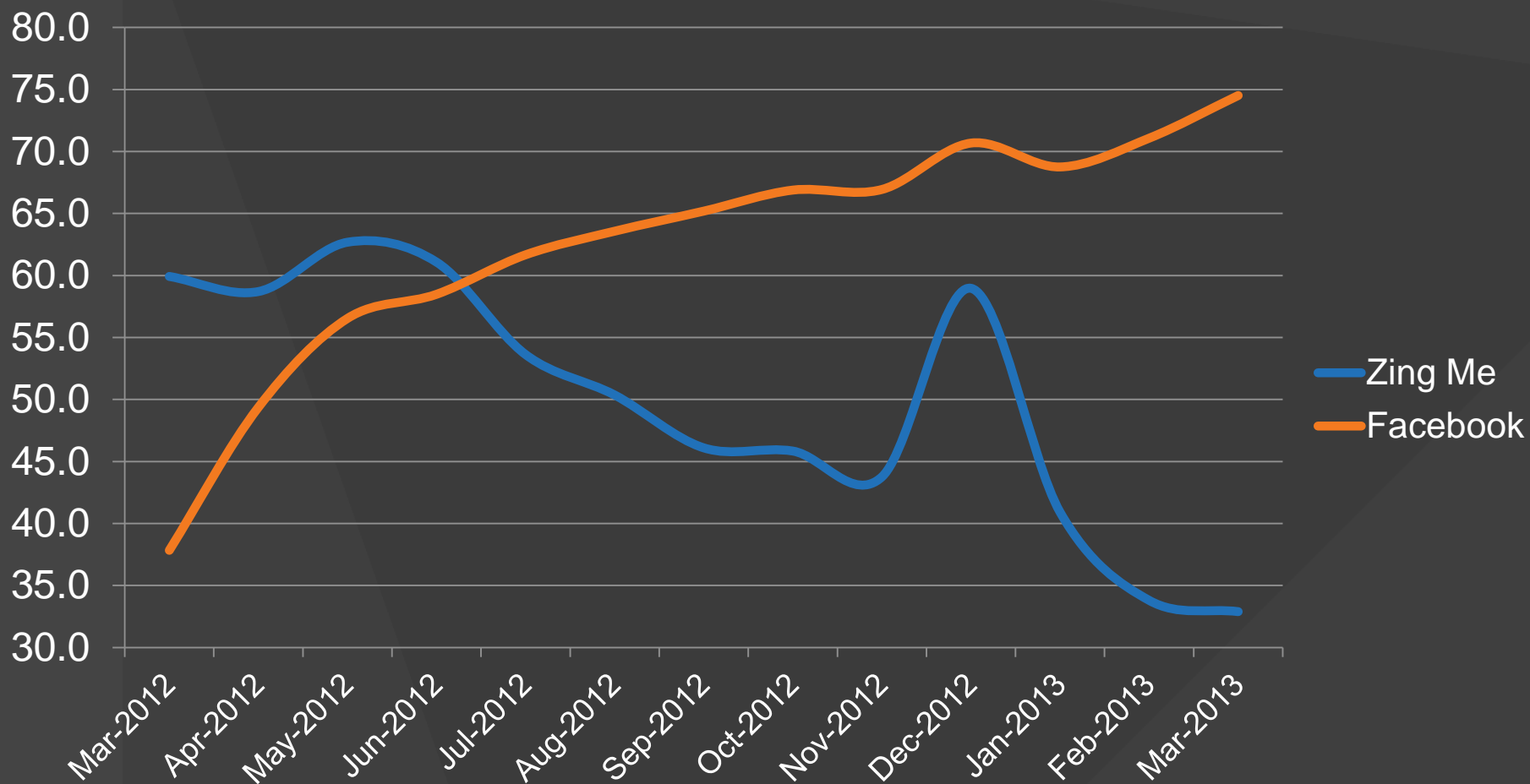


The Philippines, Thailand, and Malaysia Among Top 15 Countries With the Highest Facebook Penetration Globally

Facebook Top 15 Markets by % Reach



Facebook Reach in Vietnam Doubles, #1 Social Network Gains major share from Zing

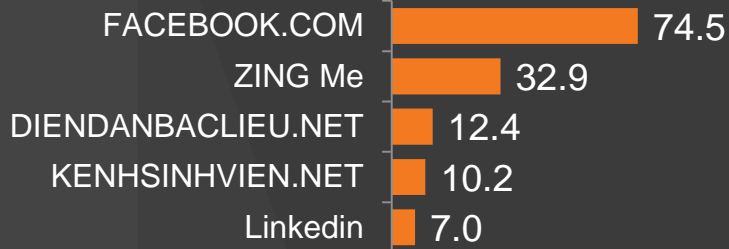


Top Social Networks by Country

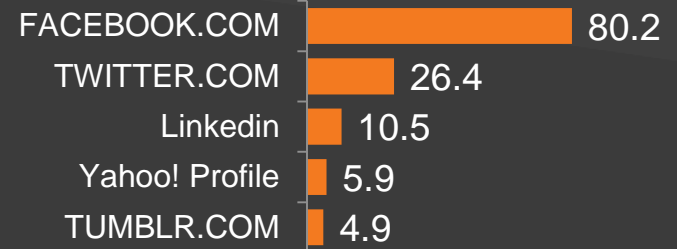
After Facebook, Twitter, LinkedIn and Tumblr are Popular
Only Vietnam has Substantial Local Social Networks

Reach of Top 5 Social Networks by Country

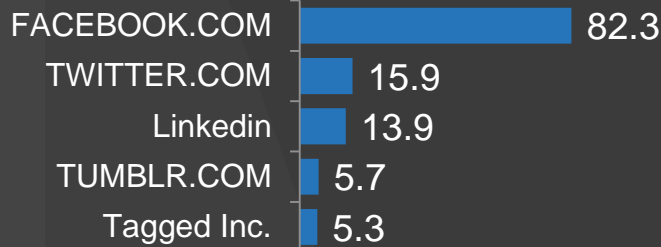
Vietnam



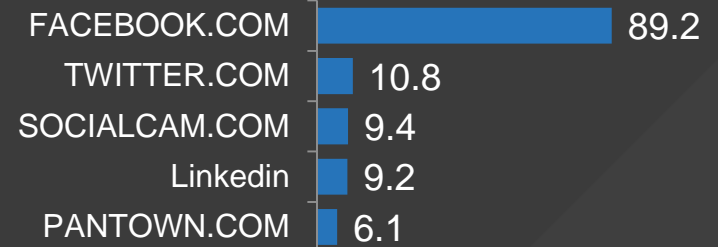
Indonesia



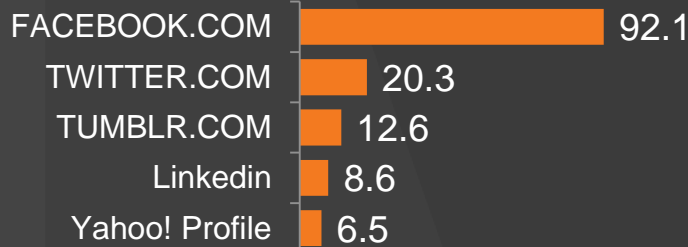
Malaysia



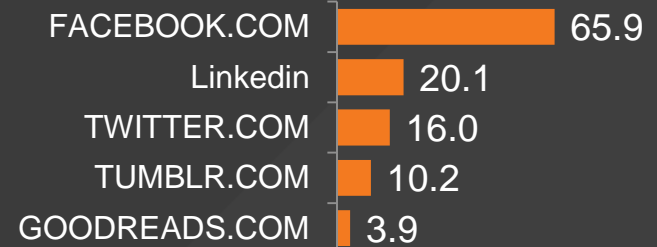
Thailand



Philippines



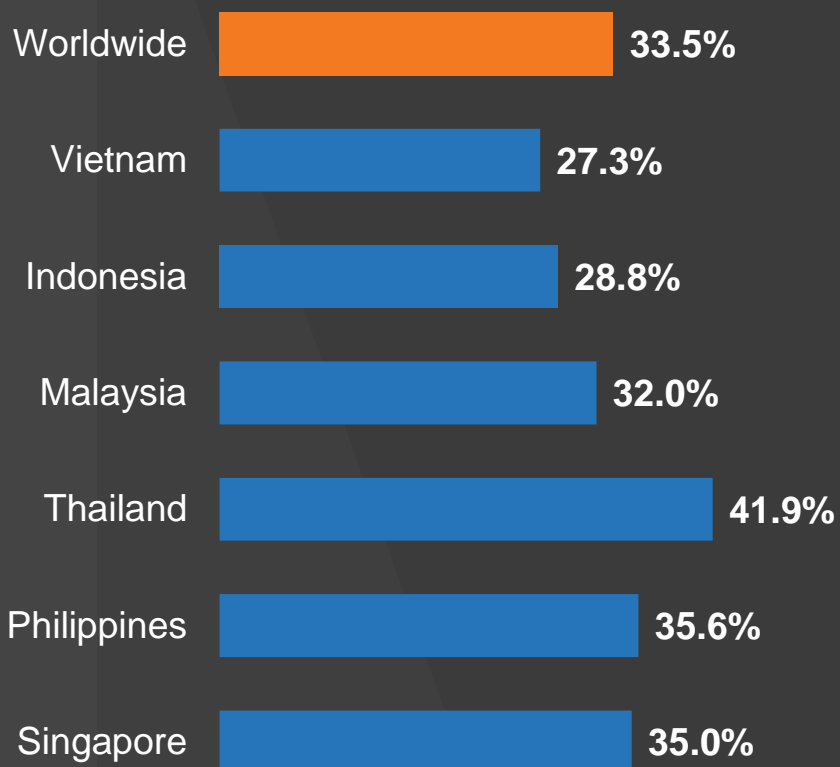
Singapore



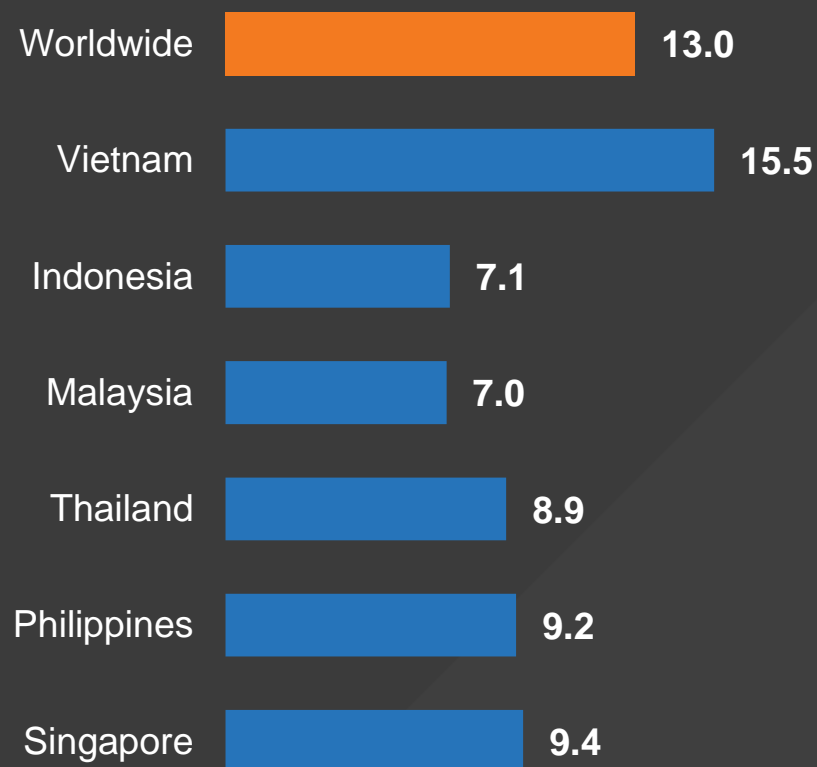
Hand in Hand with SNs, Photo Sharing Sites are Popular in the Region

Thailand, Philippines and Singapore had Highest Reach for the Category

Percent Reach of Photos Category



Minutes Spent per Visitor on Photos Category



#FutureinFocus

ONLINE RETAIL ON THE RISE



Amazon and Lazada Among the Top Retailers in SEA

Local Players Doing Well in Vietnam

Unique Visitors (000) Top 5 Retail Sites per Country

Vietnam	
VATGIA.COM	6,322
Lazada Sites	2,351
5GIAY.VN	2,203
ENBAC.COM	1,970
THEGIOIDIDONG.COM	1,793

Indonesia	
AVG.COM	1,435
Amazon Sites	1,347
Lazada Sites	1,260
INDONETWORK.CO.ID	778
Apple.com Worldwide Sites	703

Malaysia	
Amazon Sites	1,497
AVG.COM	1,050
Alibaba.com Corporation	935
Apple.com Worldwide Sites	840
GROUPON.MY	640

Thailand	
WELOVESHOPPING.COM	1,732
Rakuten Inc	1,337
AVG.COM	1,146
Lazada Sites	1,086
Apple.com Worldwide Sites	1,031

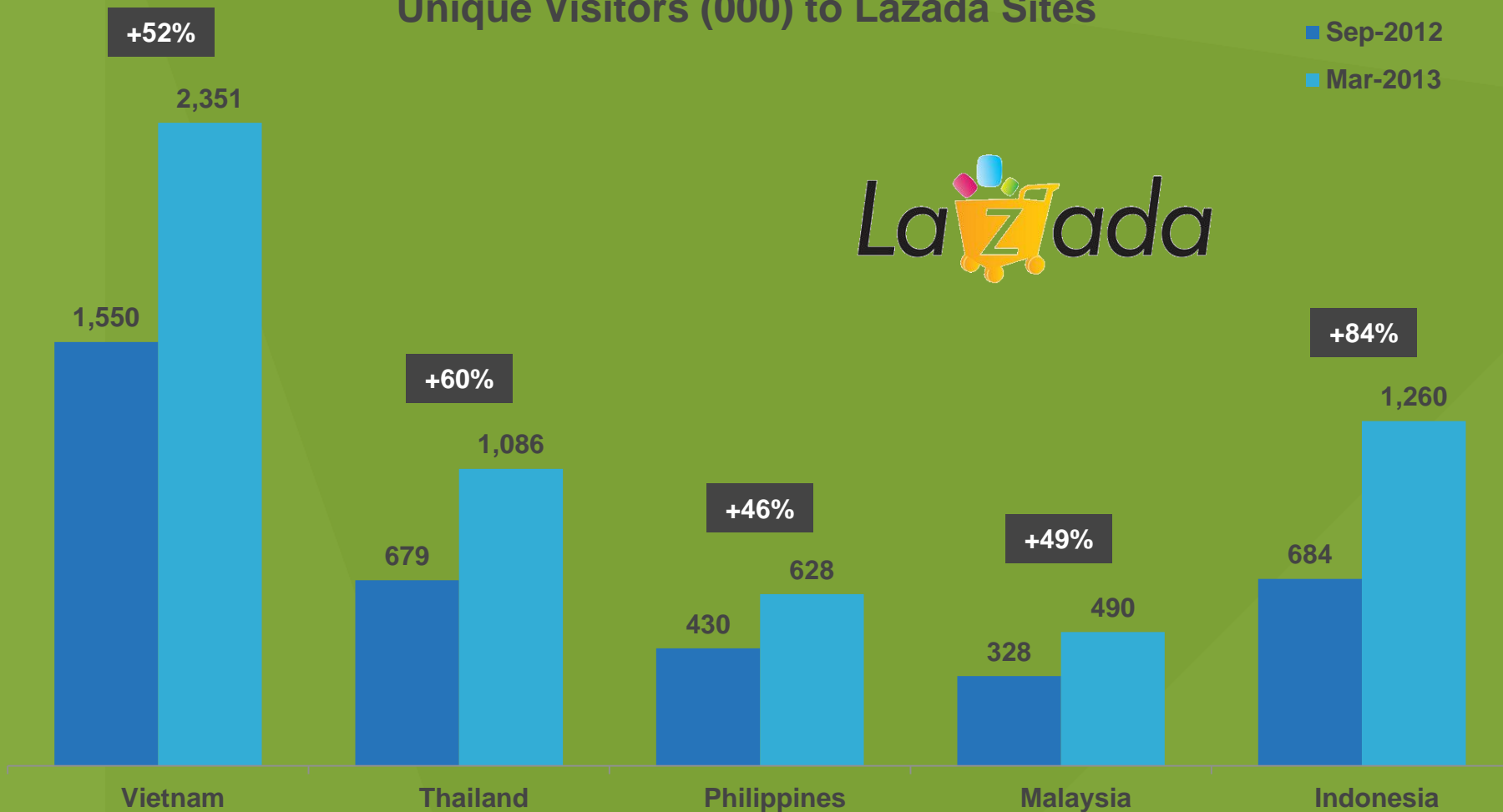
Philippines	
Amazon Sites	1,094
Apple.com Worldwide Sites	730
AVG.COM	693
Lazada Sites	628
MULTIPLY.COM	515

Singapore	
Amazon Sites	680
Apple.com Worldwide Sites	533
Giosis Group	440
Alibaba.com Corporation	326
AVG.COM	264

Spotlight: Retailer Lazada Shows Strong Growth in the Region

Heavy Increases in Penetration Over Past Six Months

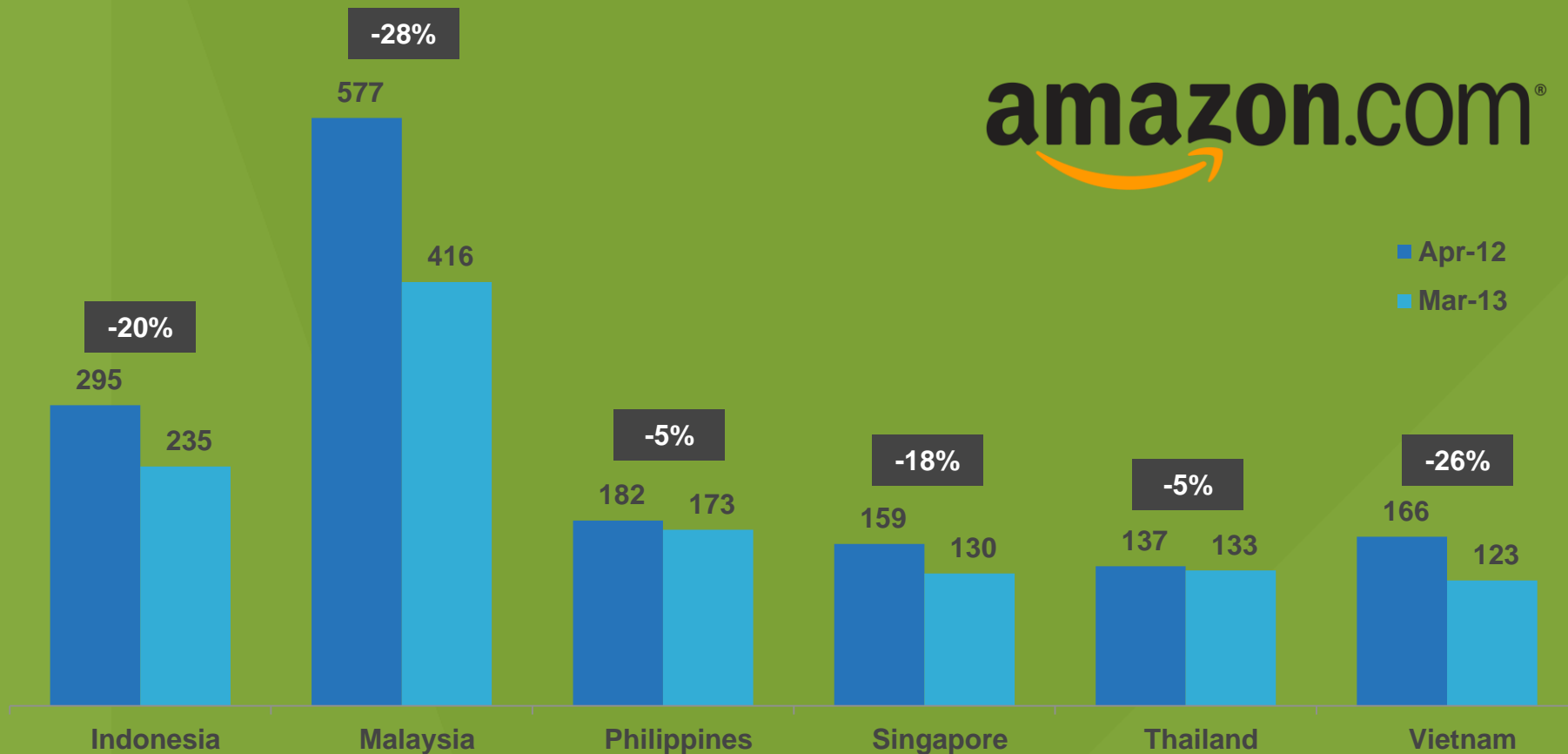
Unique Visitors (000) to Lazada Sites



Spotlight: International Leader Amazon, loses share

Malaysia, Vietnam and Indonesia show biggest drop

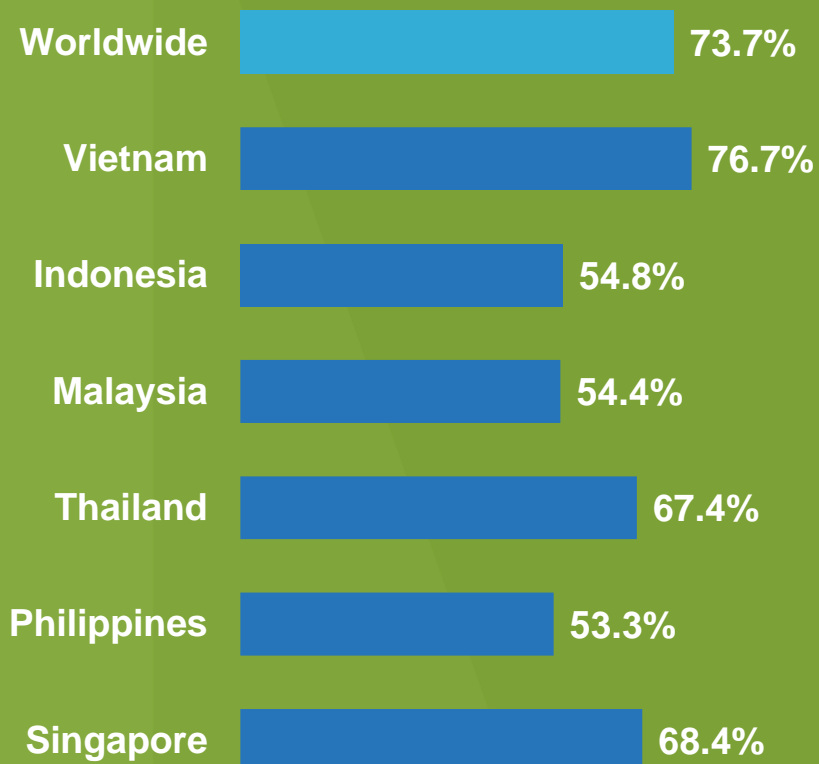
Unique Visitors (000) to Amazon Sites



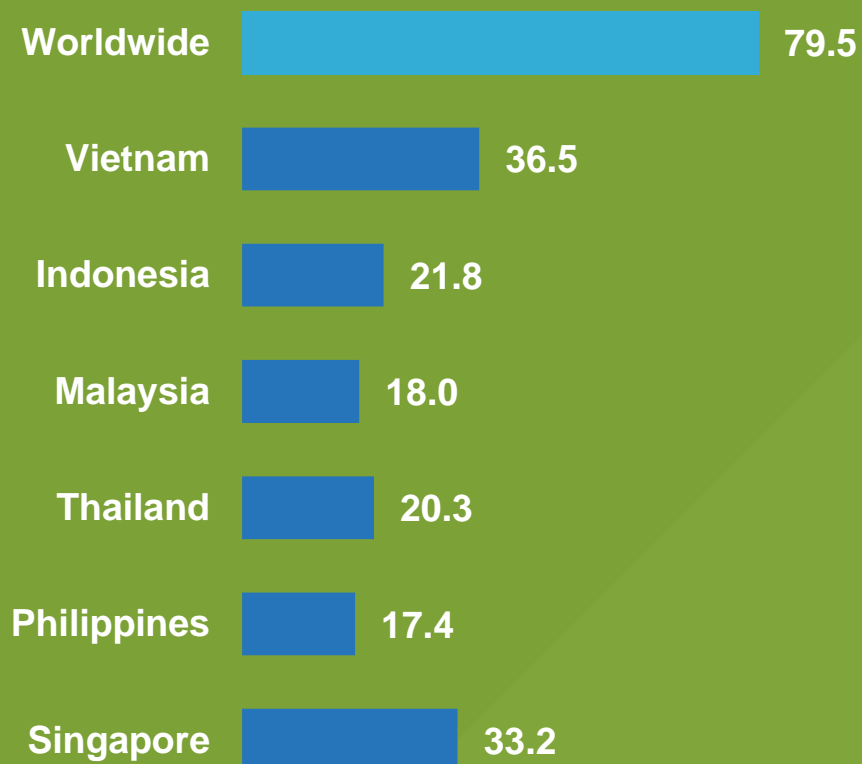
Retail Category Provides Lots of Headroom for Growth

Both in terms of Penetration and Time Spent

Percent Reach of Retail Category



Minutes Spent per Visitor on Retail Category

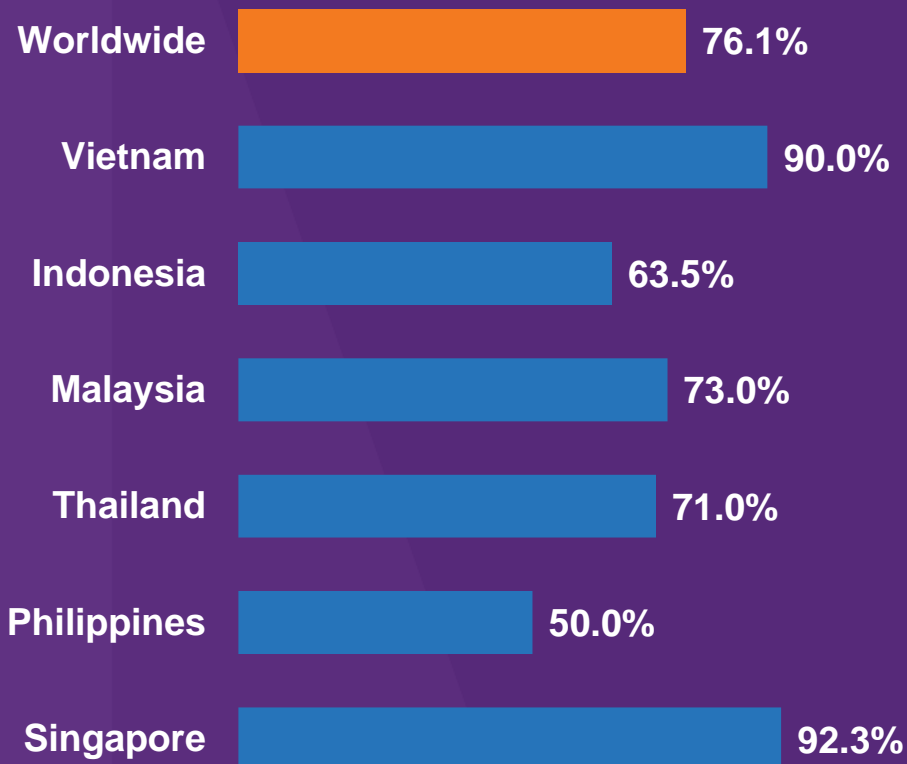


#FutureinFocus

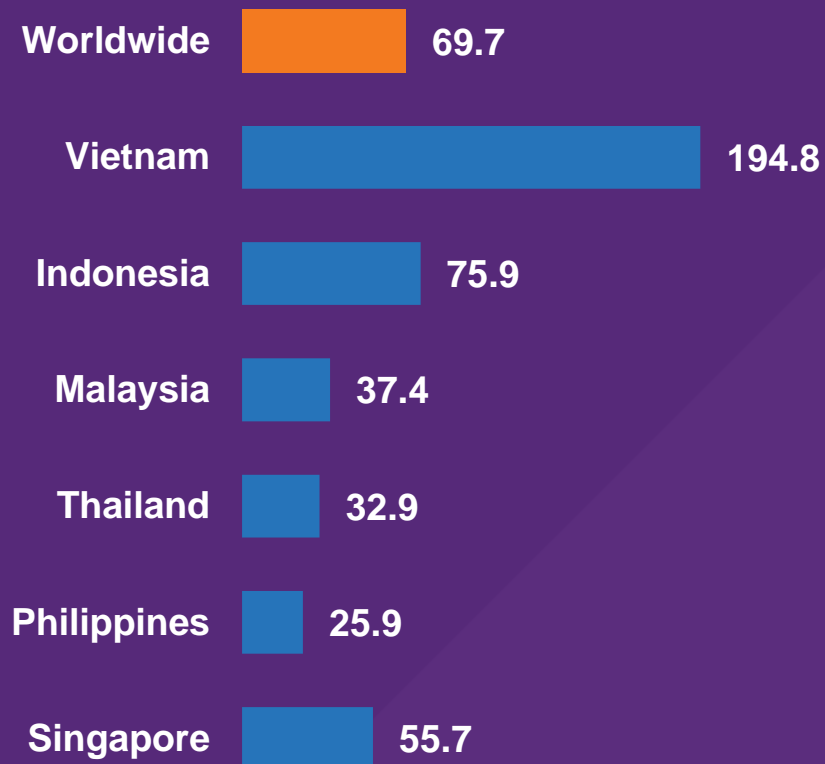
NEWS AND INFORMATION

Reach of News/Information Category is Highest in Singapore, but Visitors in Vietnam Spend the Most Time on Those Sites

Percent Reach of News/Information Category

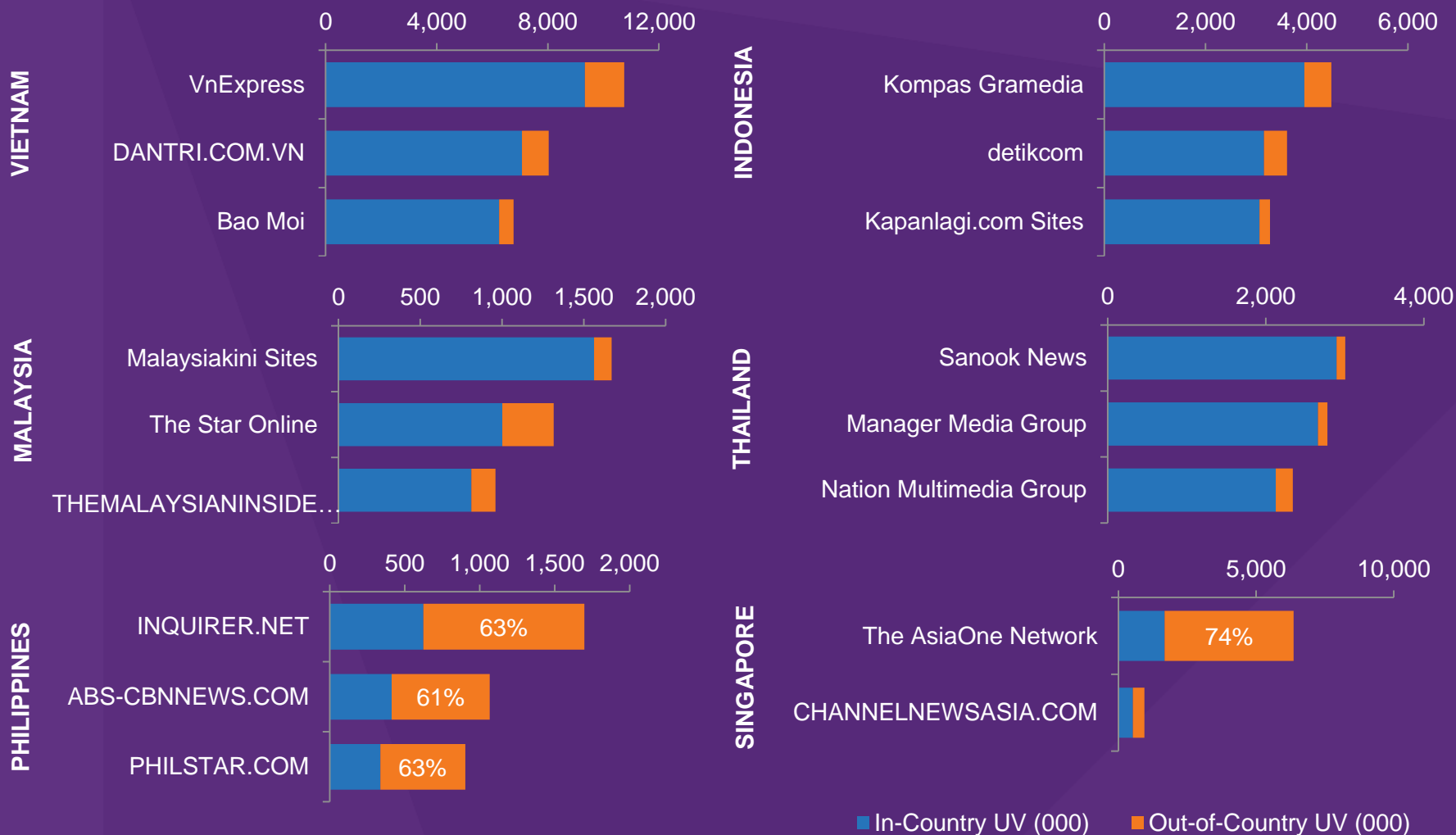


Minutes Spent per Visitor on News/Information Category



Large Nonresident Population Drives Visiting to Filipino News Sites

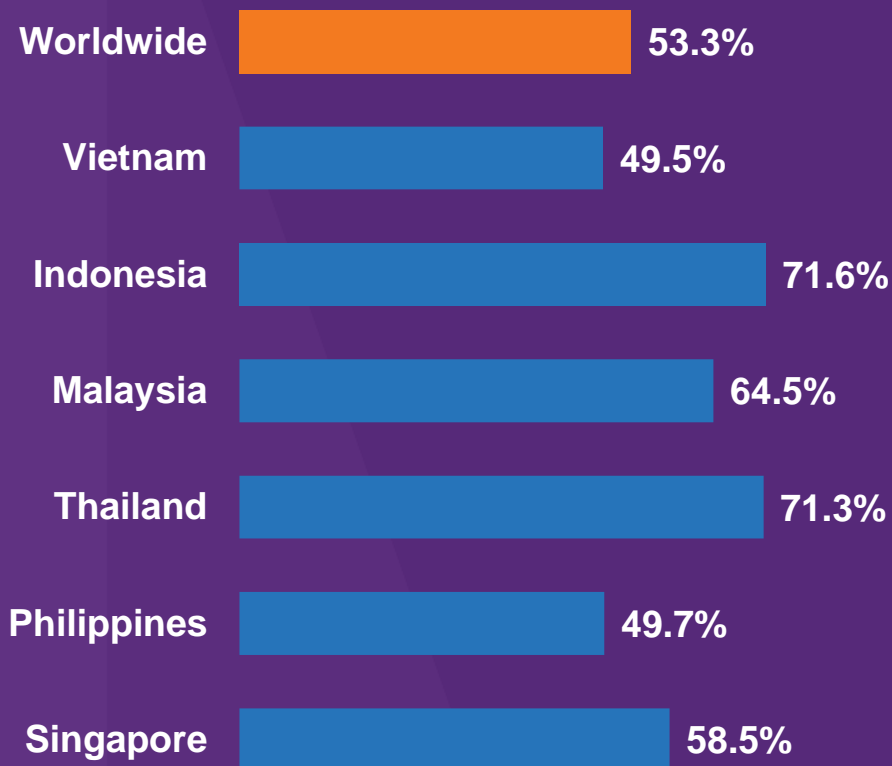
Singapore's News Channels Source Traffic from Within the Region



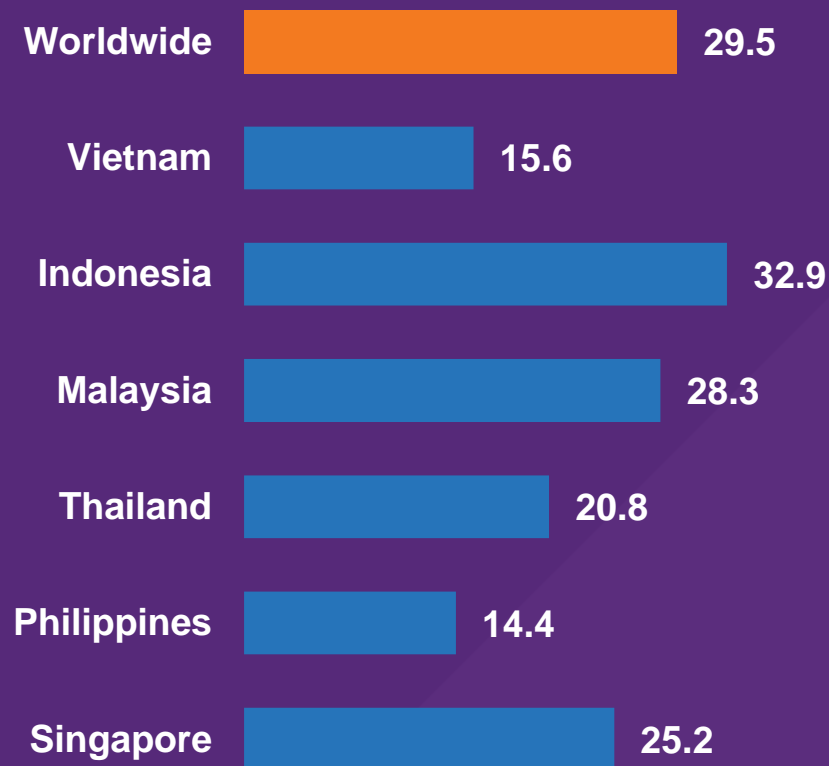
Blogs Form an Important Component of News Stream

Reach of the Category is Highest in Indonesia and Thailand

Percent Reach of Blogs Category



Minutes Spent per Visitor on Blogs Category



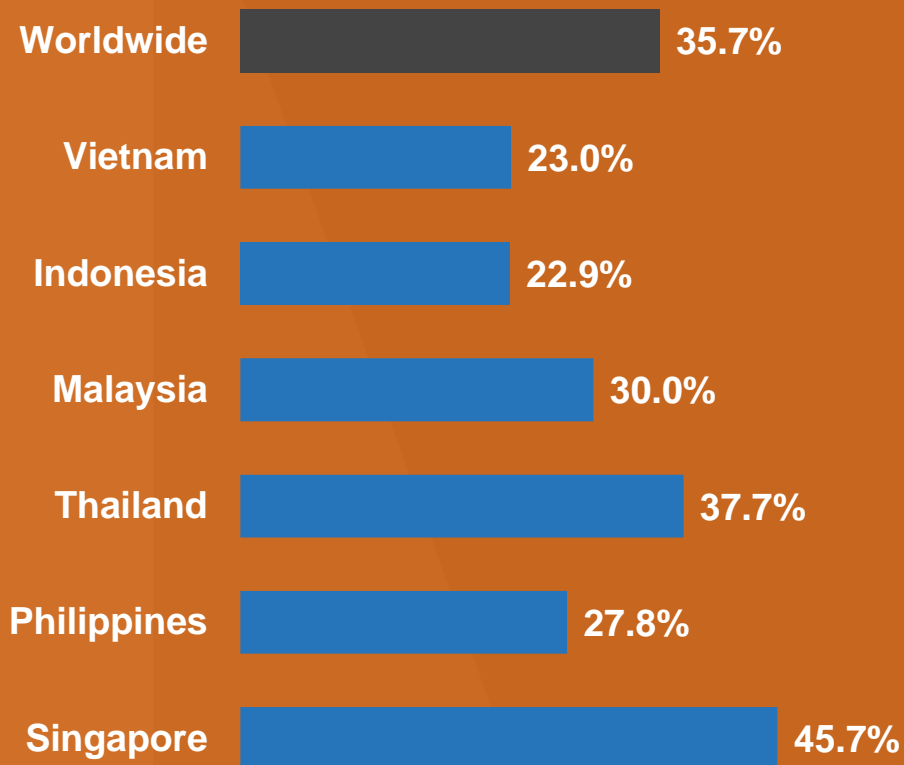
#FutureinFocus

ONLINE TRAVEL

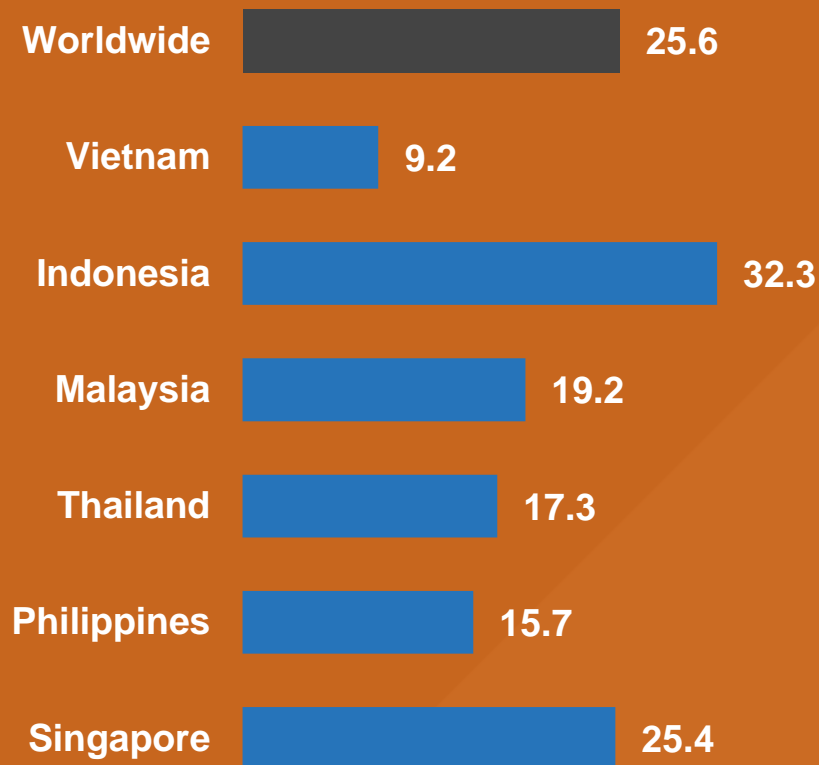
Well Traveled Singaporeans Have Highest Visitation to Travel Sites

Users in Thailand also Visit at an Above-Average Rate, while Indonesians Spent the Most Time on the Category

Percent Reach of Travel Category



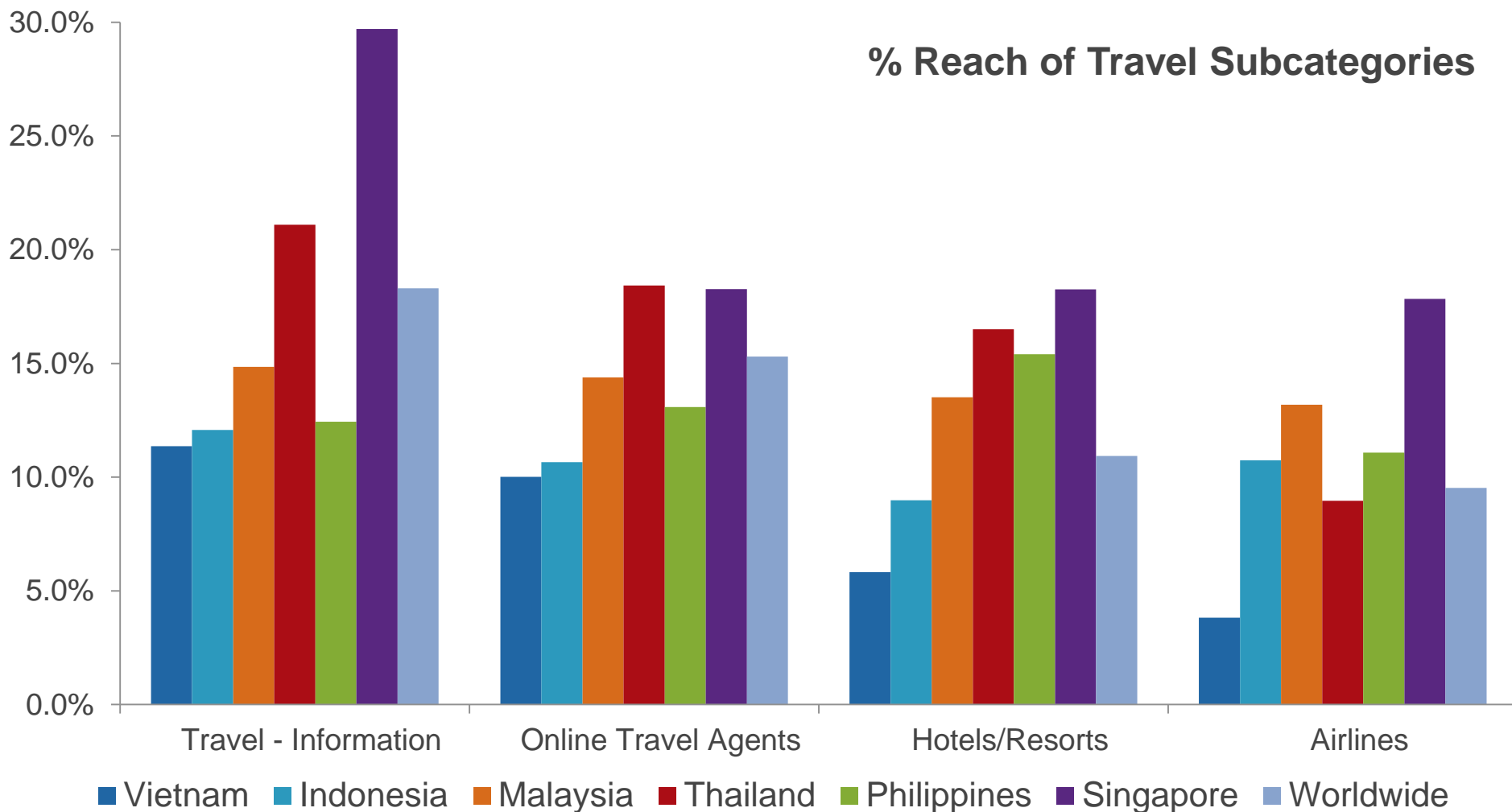
Minutes Spent per Visitor on Travel Category



Visiting to Travel Subcategories

Singapore and Thailand lead others in the travel segment

% Reach of Travel Subcategories



Priceline Has Made Major Inroads in All Markets in Southeast Asia

Local Low-Cost Airlines Prominent in Top Sites Lists Across Region

Unique Visitors (000) Top 5 Travel Sites per Country

Vietnam	
Priceline.com Incorporated	424
MYTOUR.VN	309
VIETJETAIR.COM	305
Vietnam Airlines	301
Qantas Airlines	294

Indonesia	
Priceline.com Incorporated	970
LIONAIR.CO.ID	561
AirAsia	513
TripAdvisor Inc.	396
GARUDA-INDONESIA.COM	381

Malaysia	
Priceline.com Incorporated	1,278
AirAsia	1,078
Malaysia Airlines	672
TripAdvisor Inc.	629
Orbitz Worldwide	294

Thailand	
Priceline.com Incorporated	1,229
Sanook Travel	557
AirAsia	541
TripAdvisor Inc.	389
CHIANGRAIFOCUS.COM	346

Philippines	
Priceline.com Incorporated	569
CEBUPACIFICAIR.COM	464
TripAdvisor Inc.	336
AirAsia	199
Orbitz Worldwide	168

Singapore	
STREETDIRECTORY.COM	374
Priceline.com Incorporated	372
TripAdvisor Inc.	299
Tiger Airways	238
Qantas Airlines	203

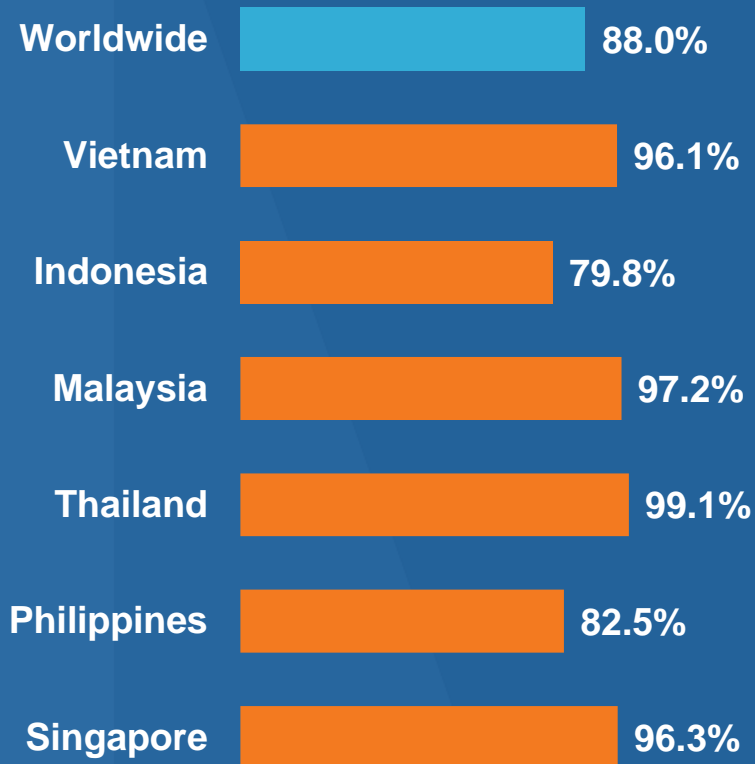
#FutureinFocus

ENTERTAINMENT AND ONLINE VIDEO

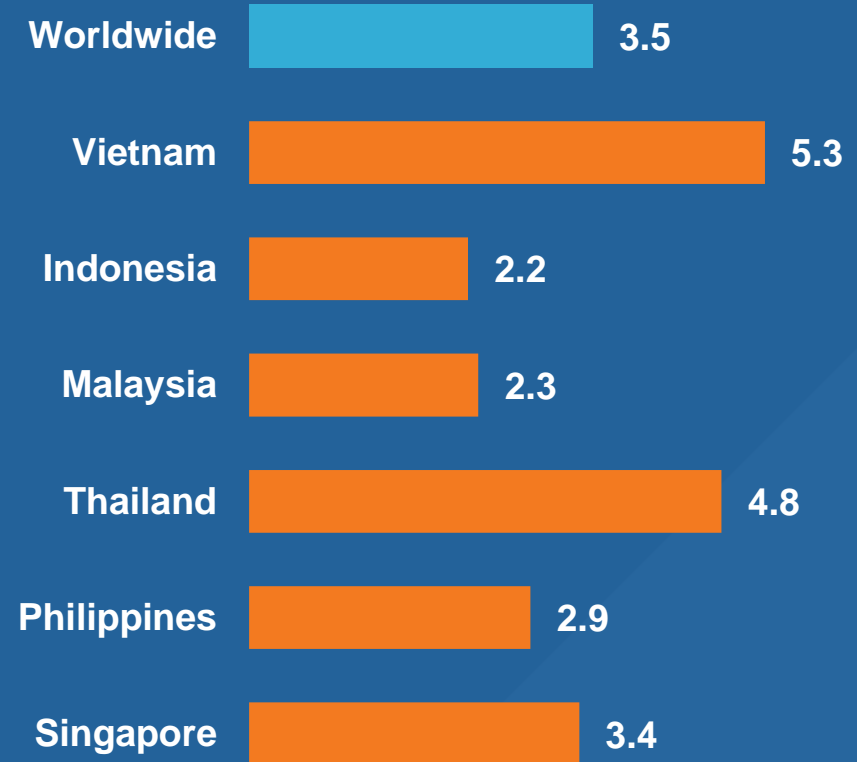


Countries with More Young People Visit and Spend More Time on Entertainment Sites

Percent Reach of Entertainment Category

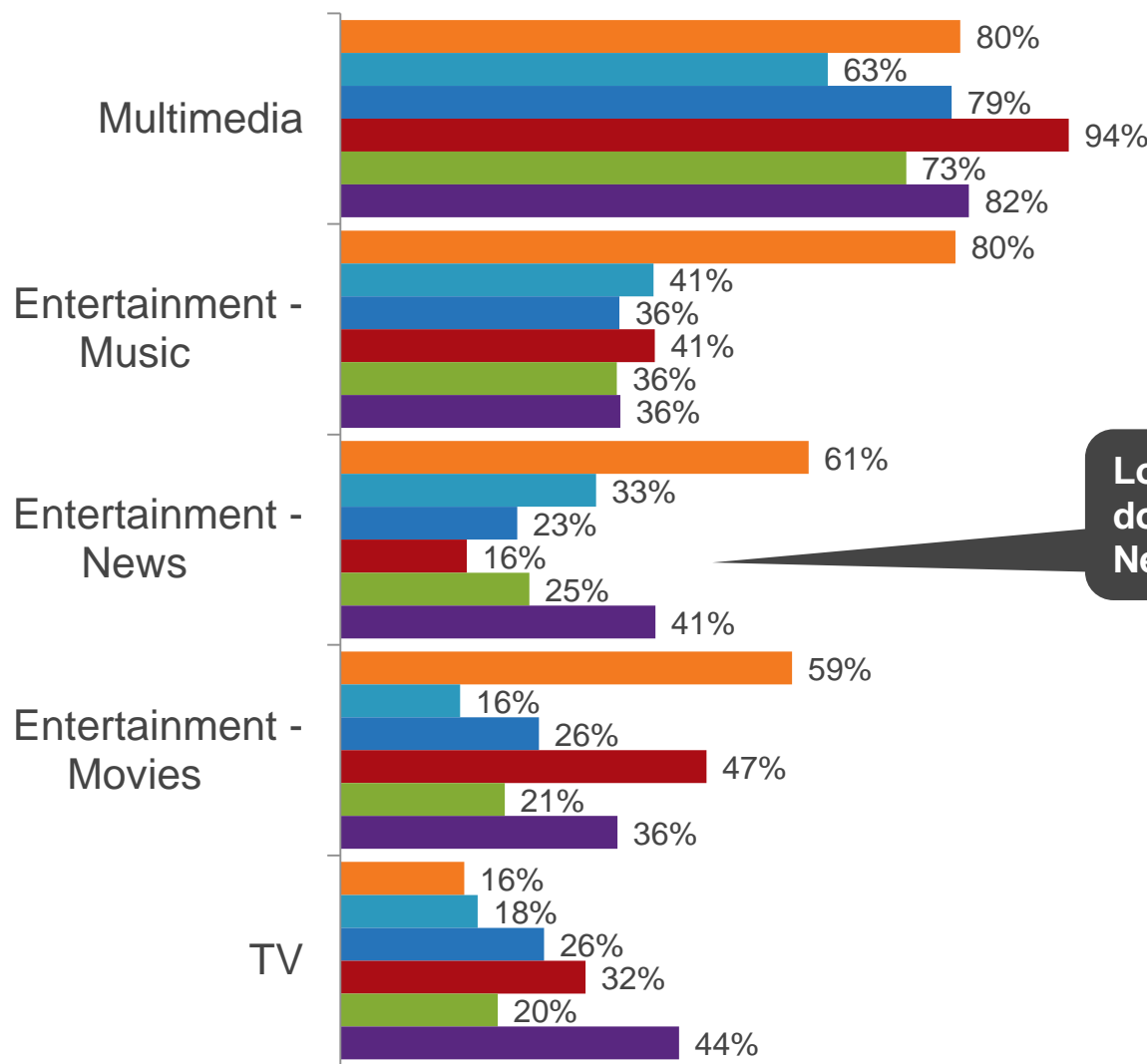


Hours Spent per Visitor on Entertainment Category



Web Users in Vietnam Most Likely to Visit Music, Movies, and Entertainment News Sites in the Region

% Reach of Entertainment Subcategories



As in almost all markets, YouTube accounts for the lion's share of visiting to Multimedia sites in this region

Local sites typically dominate the Entertainment News category

- Vietnam
- Indonesia
- Malaysia
- Thailand
- Philippines
- Singapore

Most Top Entertainment Sites in SEA are International Properties

Unique Visitors (000) Top 5 Entertainment Sites per Country

Vietnam	
YOUTUBE.COM	11,101
ZING MP3	9,711
24h Online Advertising JSC	7,054
KENH14.VN	5,373
NHACCUATUI.COM	5,236

Indonesia	
YOUTUBE.COM	7,171
omg! from Yahoo!	2,172
KAPANLAGI.COM	2,133
CBS Interactive	1,808
VEVO	1,636

Malaysia	
YOUTUBE.COM	7,339
CBS Interactive	2,152
VEVO	1,884
Viacom Digital	1,730
DAILYMOTION.COM	1,329

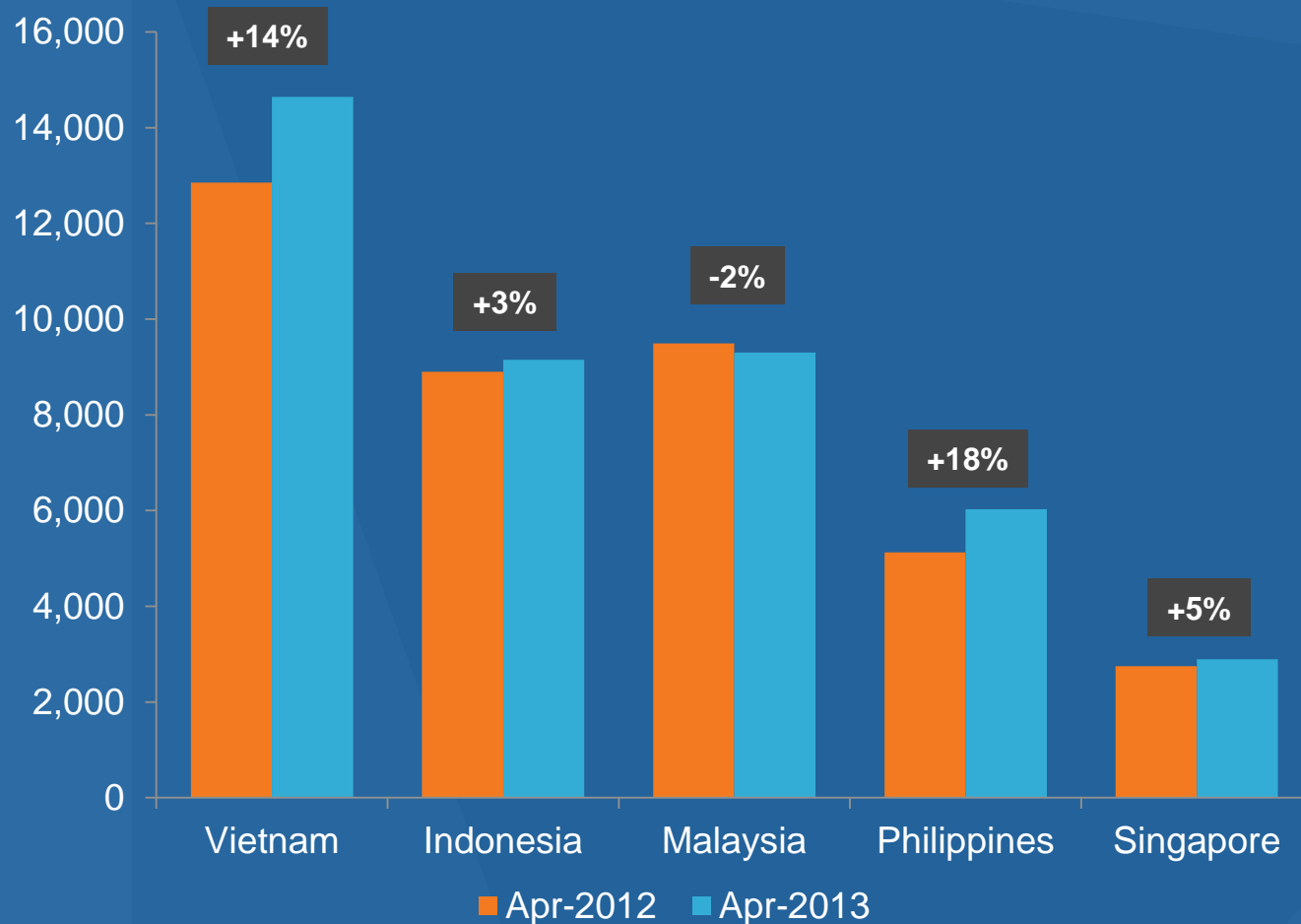
Thailand	
YOUTUBE.COM	7,289
MTHAI.COM	3,329
DAILYMOTION.COM	2,491
VEVO	2,053
iTunes Software (App)	1,589

Philippines	
YOUTUBE.COM	4,902
VEVO	1,563
CBS Interactive	1,447
Viacom Digital	1,231
iTunes Software (App)	1,225

Singapore	
YOUTUBE.COM	1,989
iTunes Software (App)	978
CBS Interactive	870
MediaCorp Network	772
VEVO	694

Online Video Shows Steady Growth Over the Past Year

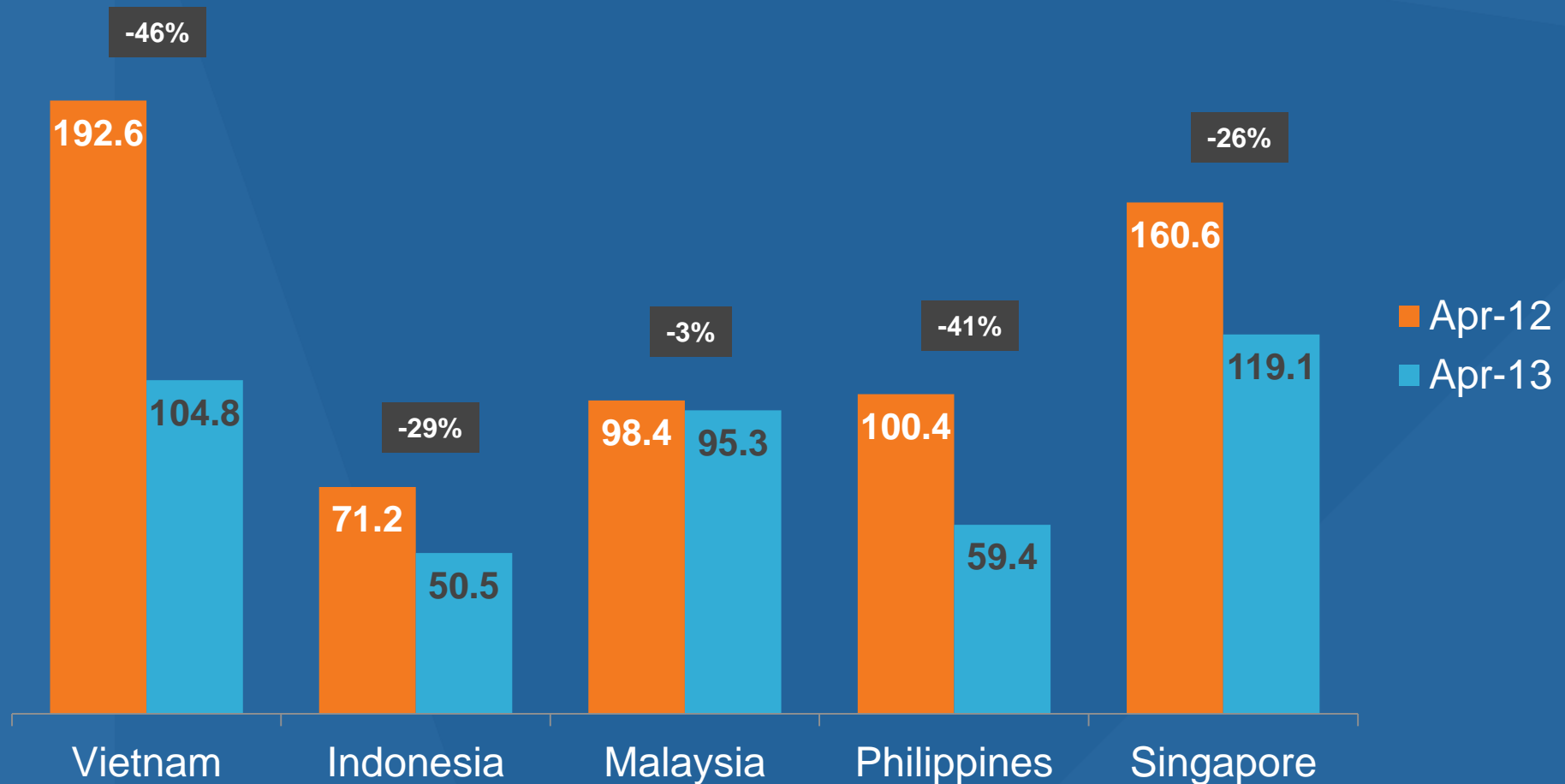
42 Million Online Video Viewers in the Region* Now



*Sum of 5 Countries Under Video Measurement by comScore

But Videos Per-Viewer on PC moves in opposite direction

Videos Viewed per Visitor

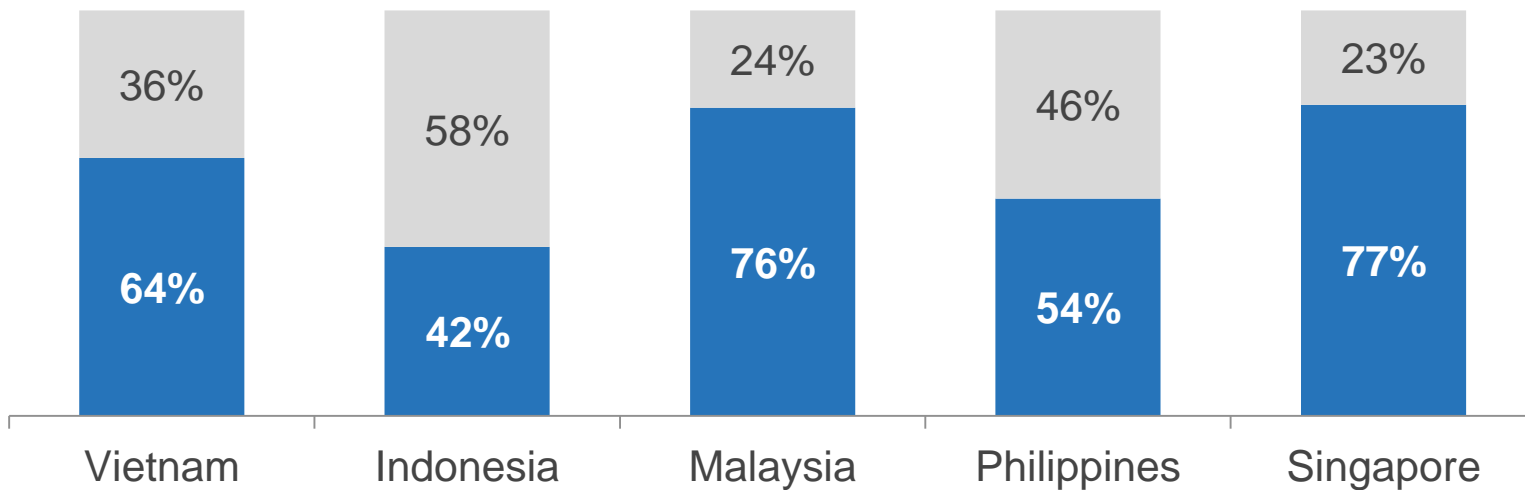


Google Accounts for the Majority of Videos Viewed Overall in the Region, with Some Exceptions

No other major player dominates in Indonesia. 58% of videos viewed are on video properties, of which none comprise more than 2.5% of the total

In the Philippines, 14.5% of Videos Viewed are on Facebook

Share of Videos Viewed



■ All Others
■ Google Sites

Total Number of Videos Viewed

1.6 B

459 M

931 M

357 M

353 M

A large, light blue magnifying glass icon is positioned in the upper right quadrant of the image. The lens of the magnifying glass is centered on the text "#FutureinFocus".

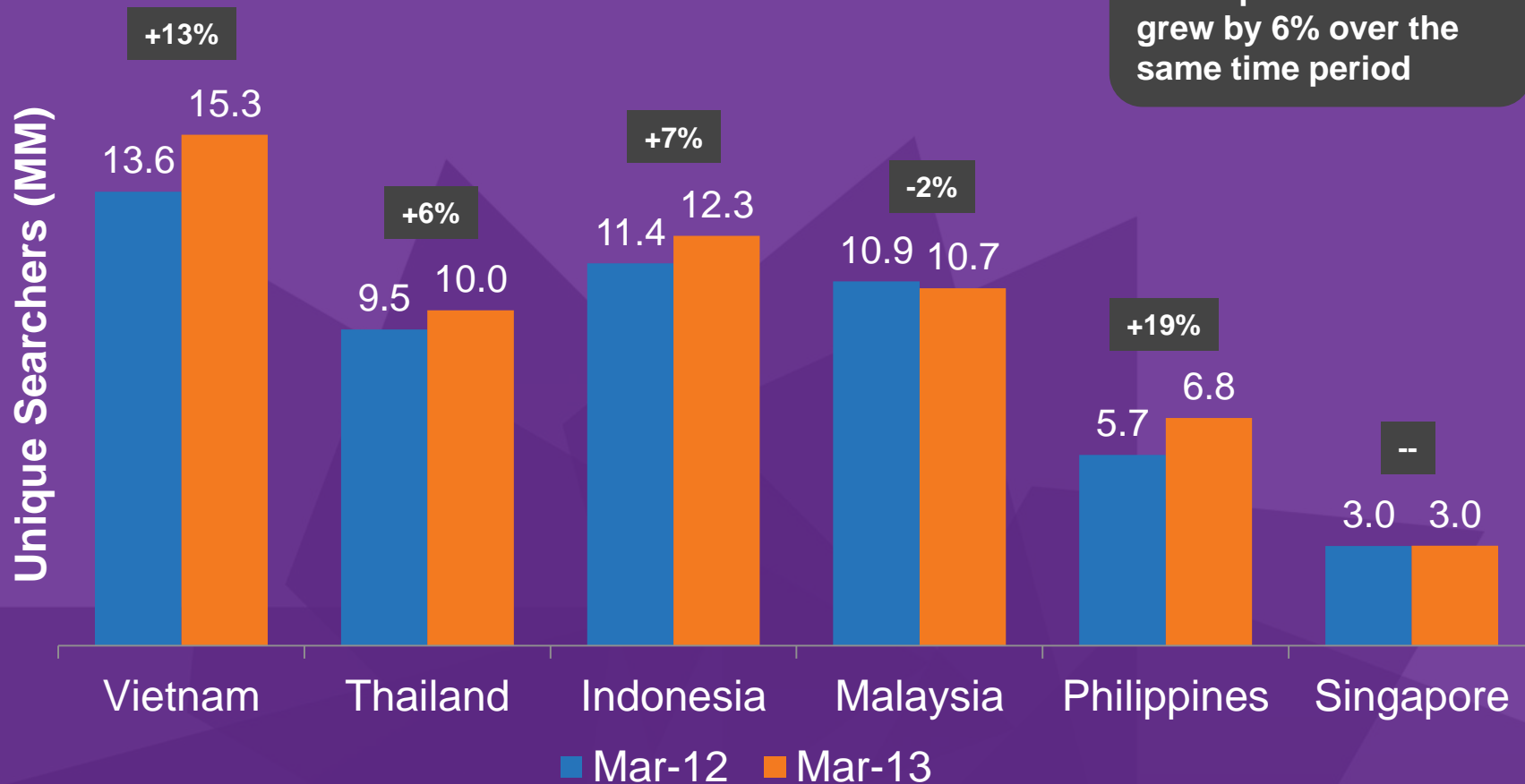
#FutureinFocus

SEARCH

Number of People Using Search Continues to Grow Except for Singapore and Malaysia

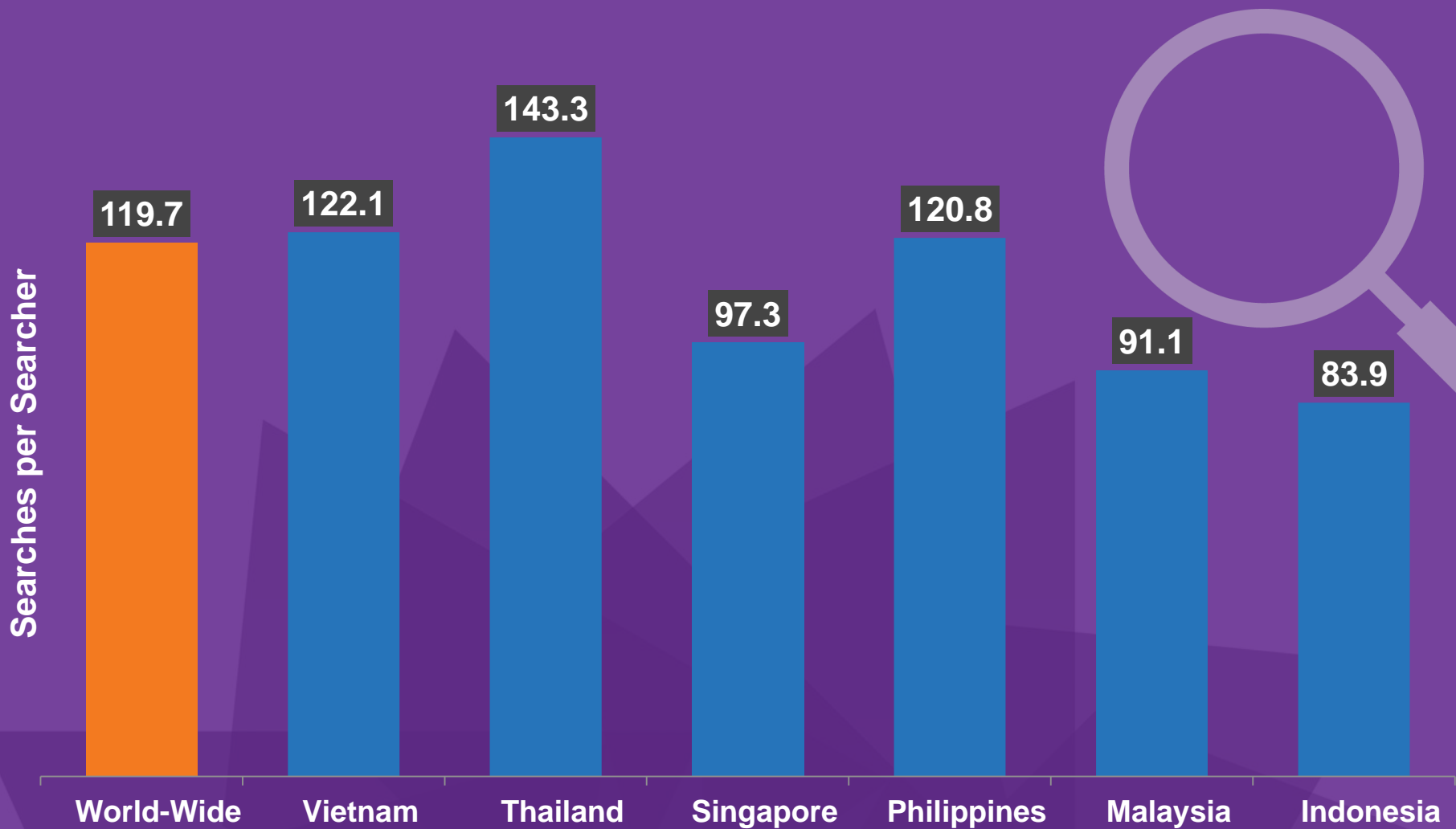
Growth in Unique Searchers March 2012 to March 2013

Worldwide, the number of unique searchers grew by 6% over the same time period



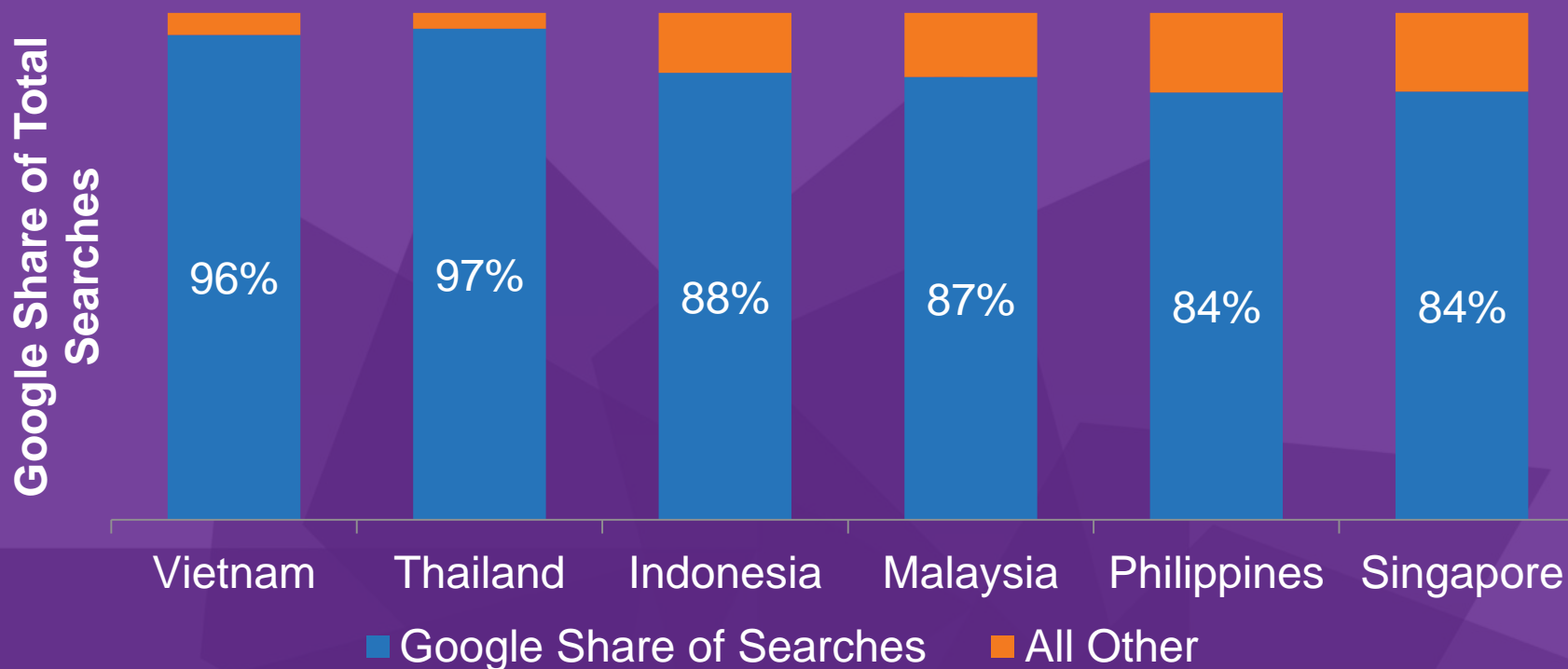
Thai Internet Users the Heaviest Searchers

Singapore, Malaysia, Indonesia Score Below Global Average



As is the Case Globally, Google Captures Vast Majority of Search Market in the Region

In Indonesia, Malaysia, the Philippines and Singapore, Yahoo! takes the #2 spot, but only accounts for less than 6% of searches in each of those countries



#FutureinFocus

COUNTRY SPOTLIGHTS

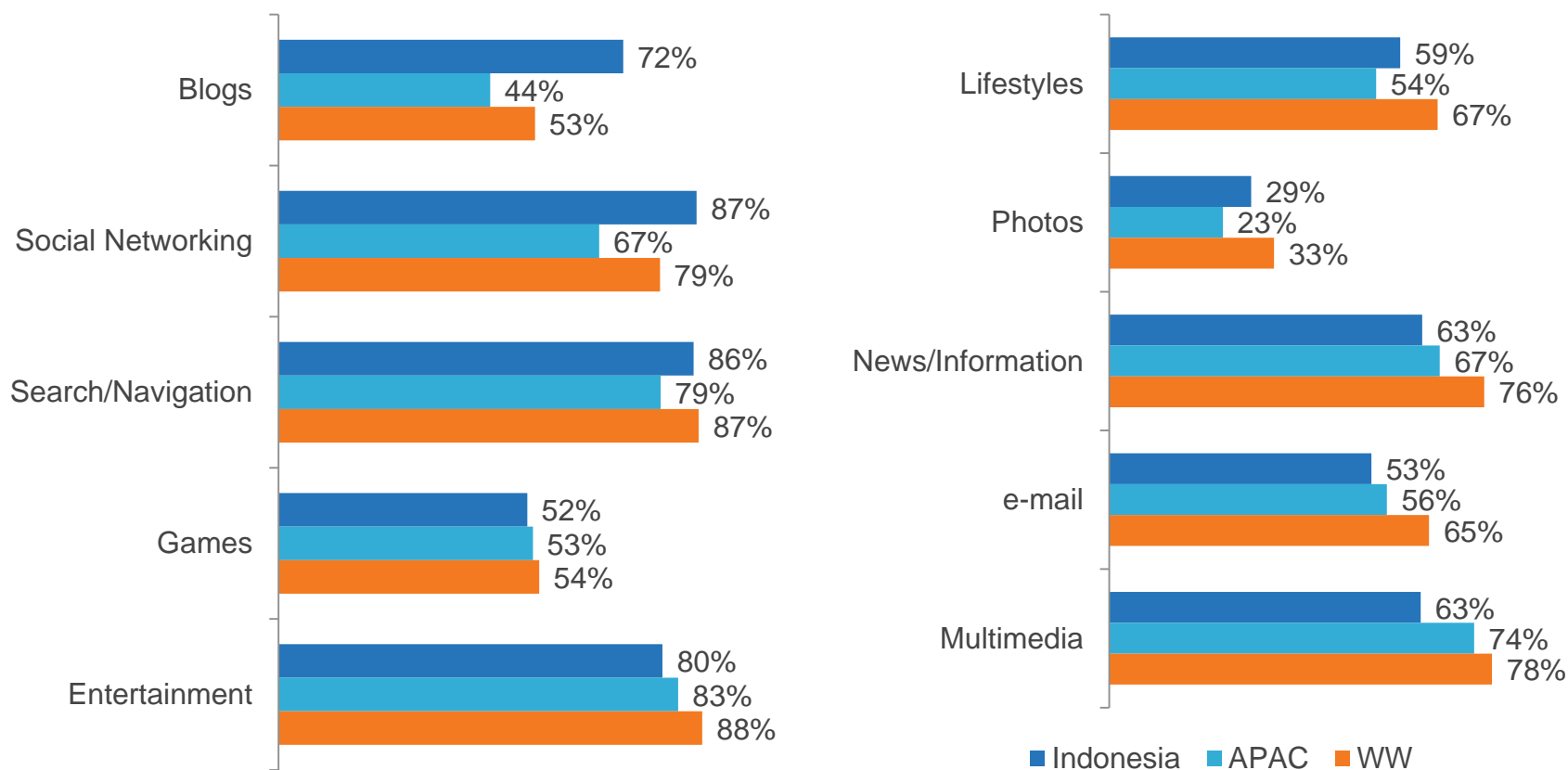


SPOTLIGHT: INDONESIA

Key Categories

Indonesians More Likely to Visit Blogs and Social Networks Other Key Categories Have Growth Potential

Highest-Indexing Categories by Reach, Compared to WW Averages

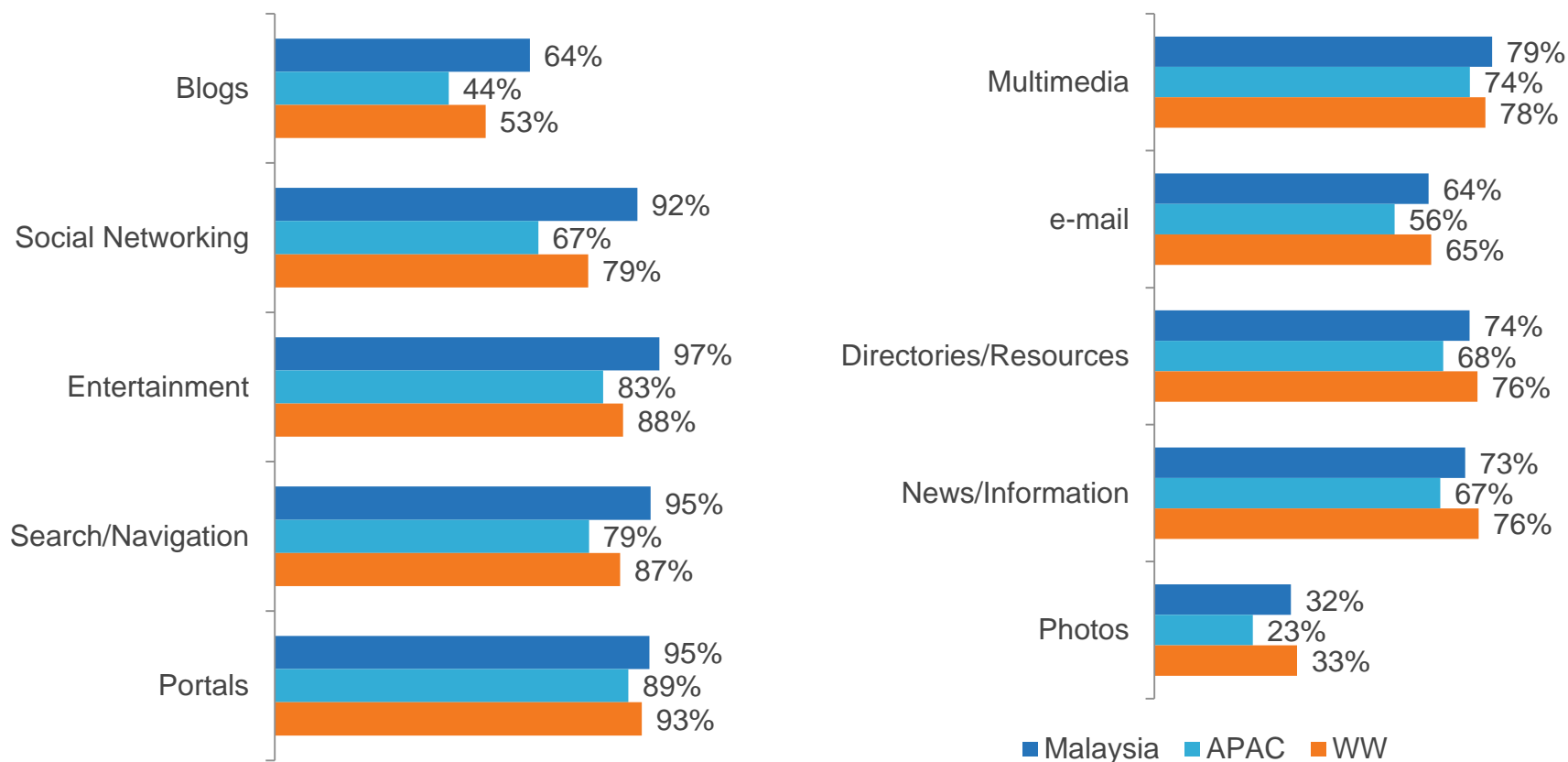


SPOTLIGHT: MALAYSIA

Key Categories

Malaysian Web Users More Likely to Visit Blog Sites; Also More Likely to Visit Social Networks and Entertainment Sites

Highest-Indexing Categories by Reach, Compared to WW Averages

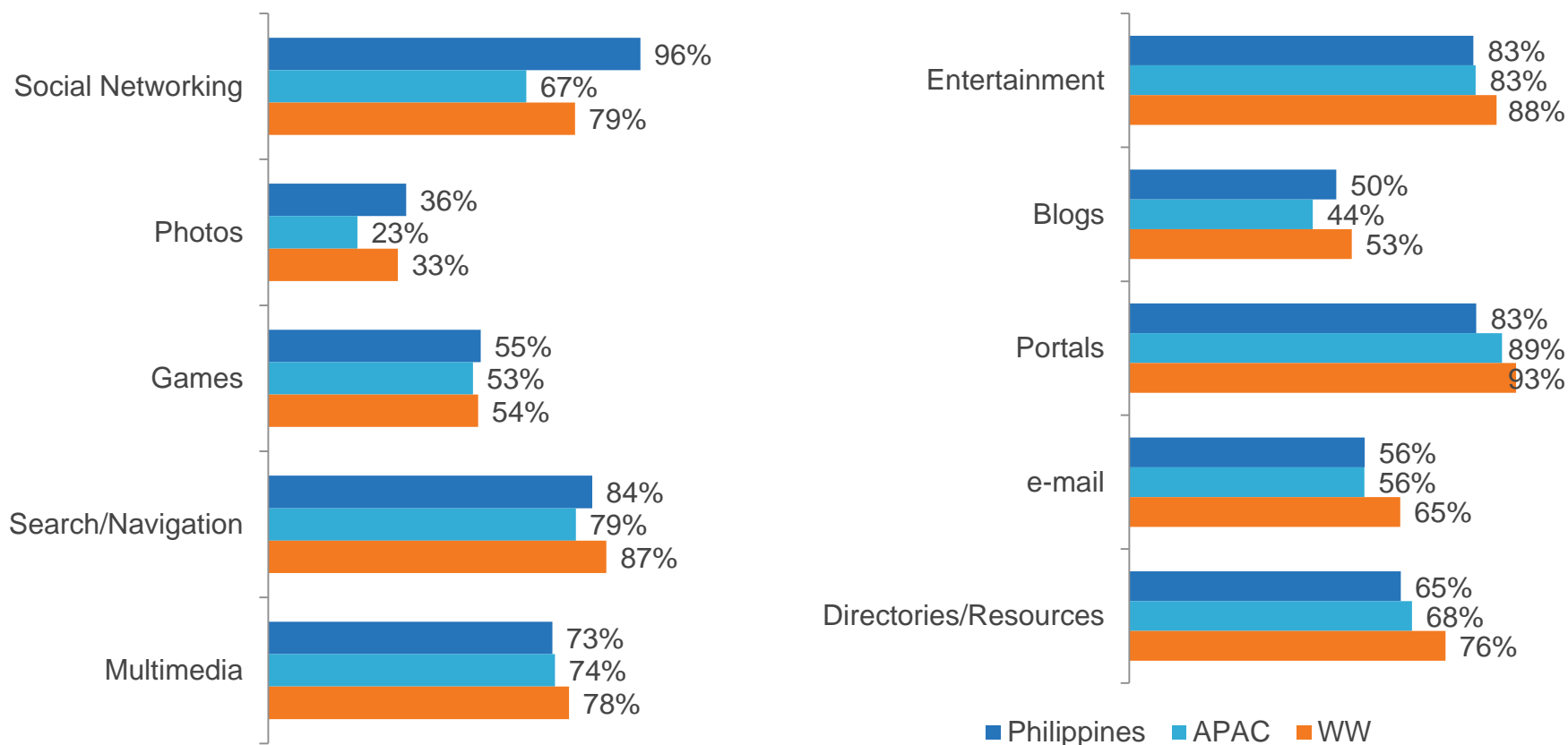


SPOTLIGHT: PHILIPPINES

Key Categories

Filipino Web Users Among the Most Likely to Visit Social Networking and Photo Sharing Sites in the World

Highest-Indexing Categories by Reach, Compared to WW Averages

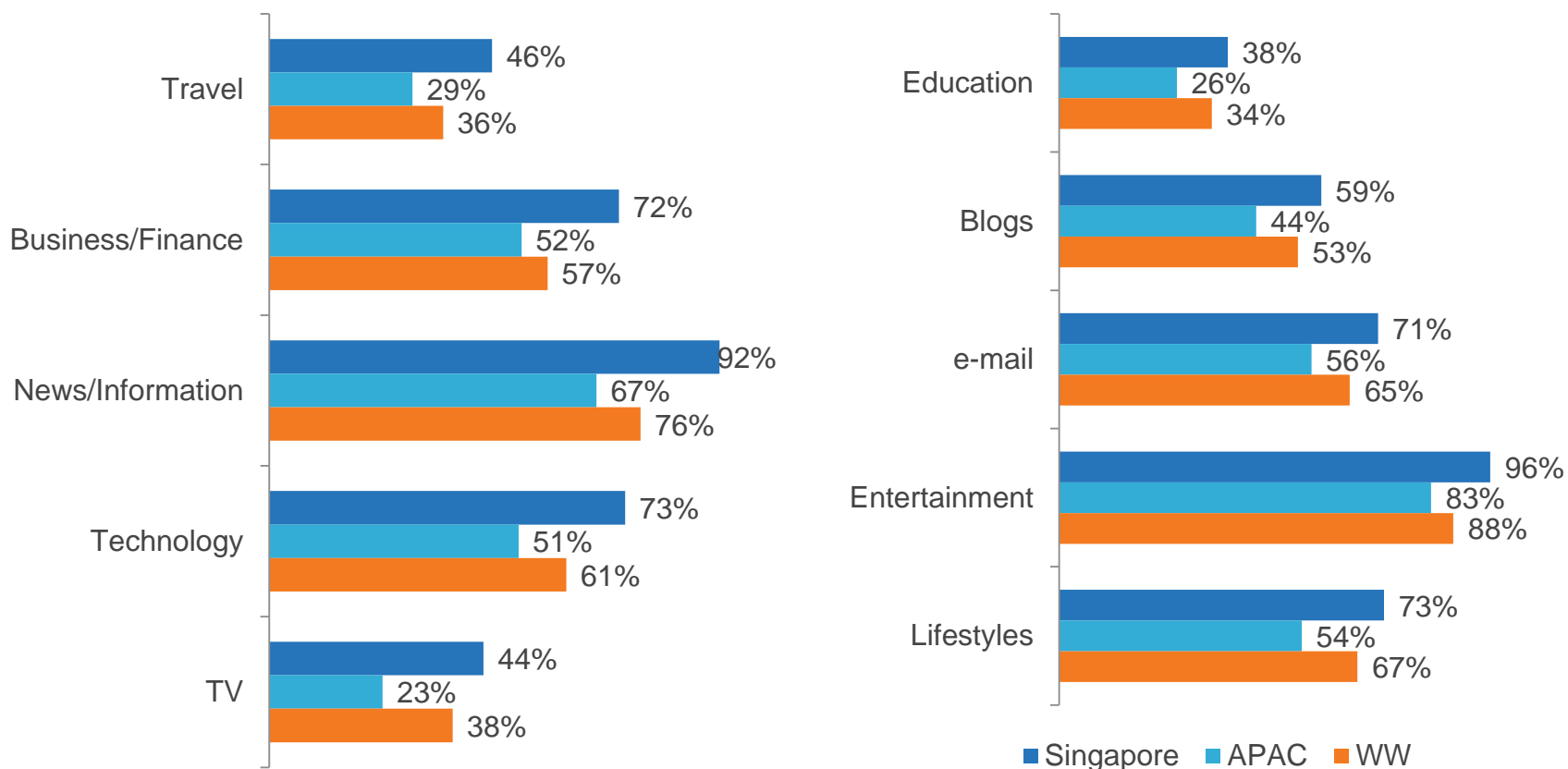


SPOTLIGHT: SINGAPORE

Key Categories

Wealthier, More Mature Web Audience in Singapore Focuses Visitation on Travel, Business/Finance, and News/Information Sites

Highest-Indexing Categories by Reach, Compared to WW Averages

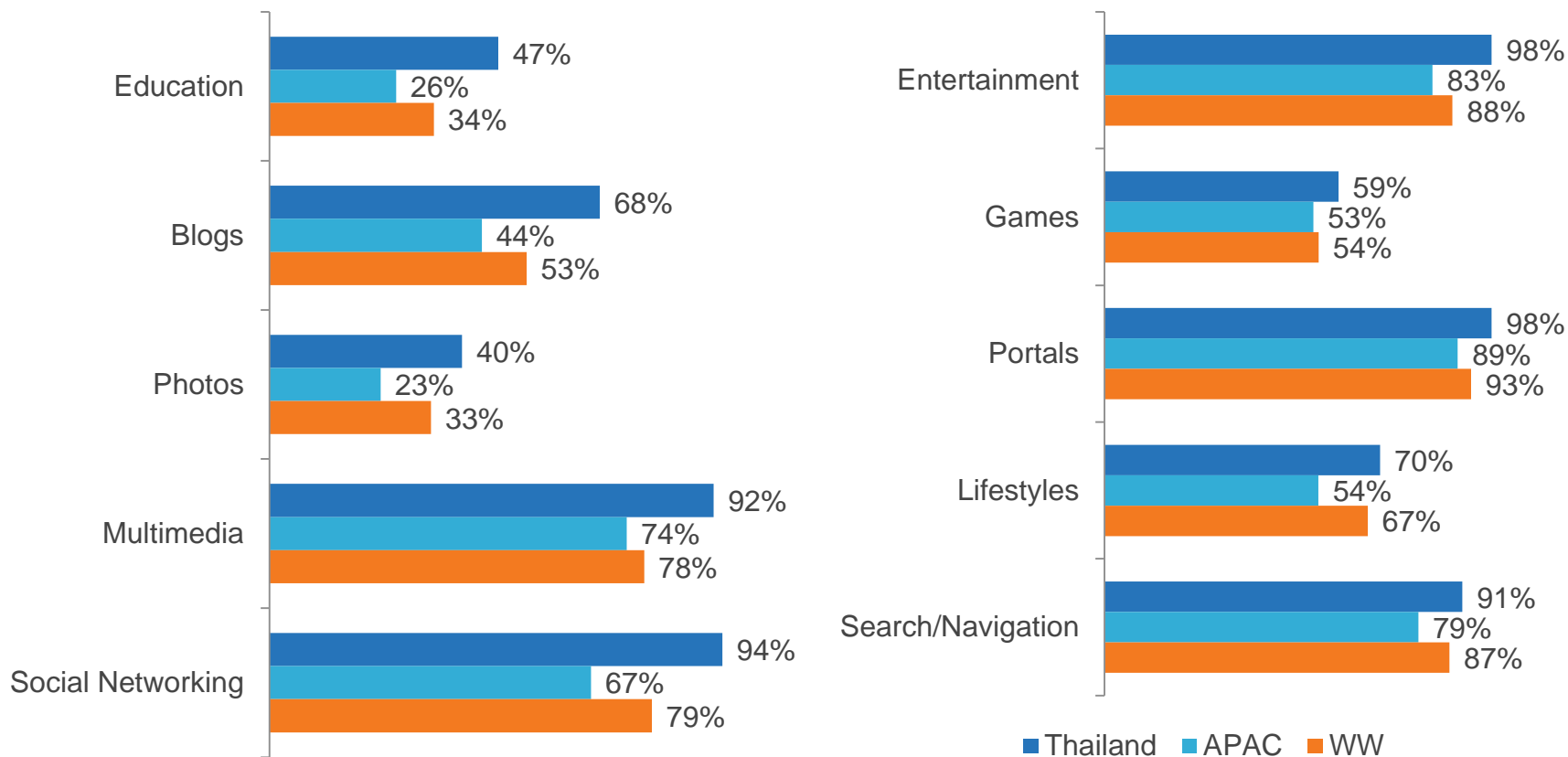


SPOTLIGHT: THAILAND

Key Categories

Thai Web Users More Likely to Visit a Breadth of Web Categories Education, Blogs, and Photos Index Highest

Highest-Indexing Categories by Reach, Compared to WW Averages

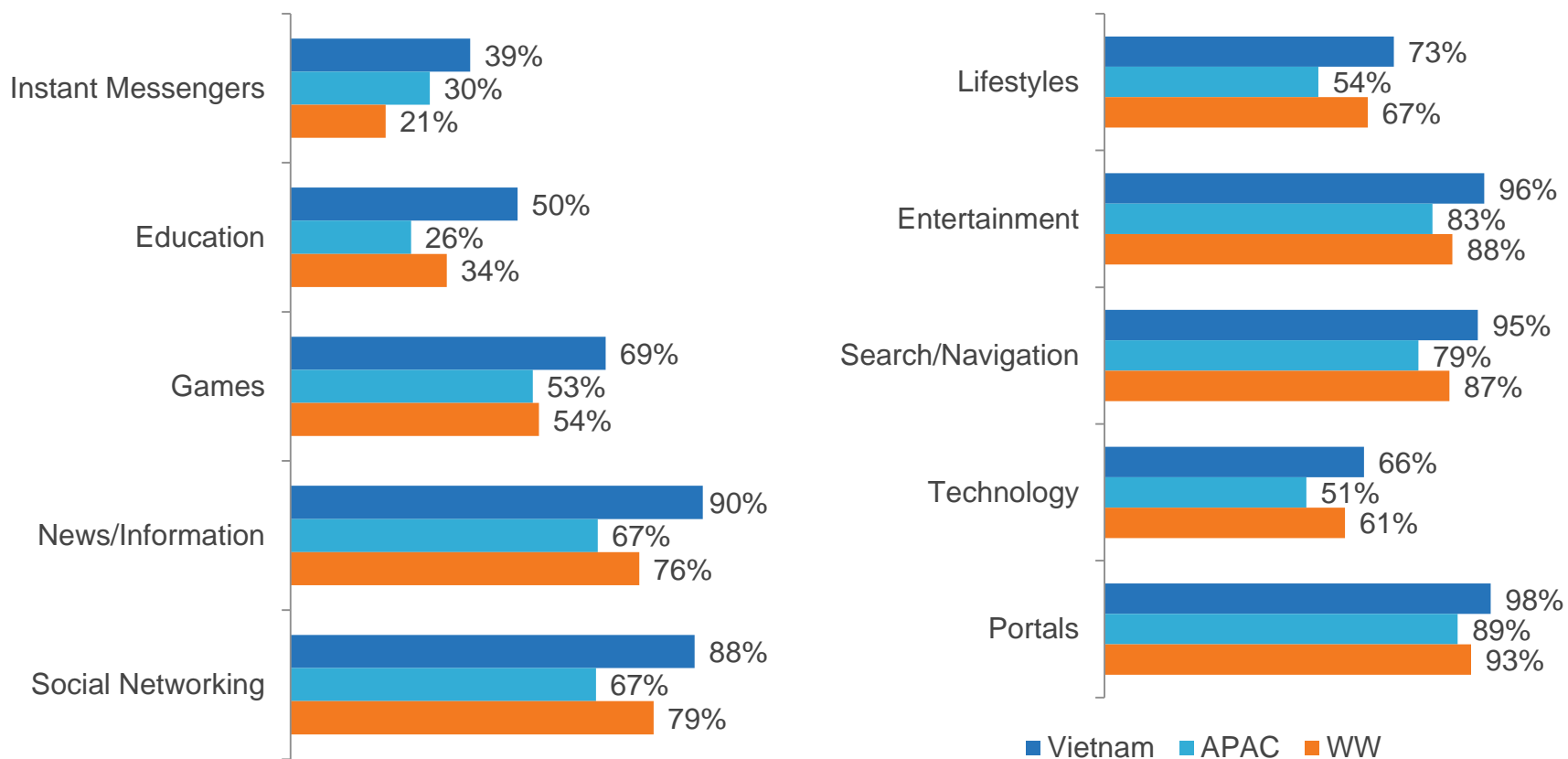


SPOTLIGHT: VIETNAM

Key Categories

Web Users in Vietnam More Likely to Visit Instant Messengers, Education, Games, and News/Information Sites

Highest-Indexing Categories by Reach, Compared to WW Averages



#FutureinFocus

CONCLUSION

2013: Putting the Future in Focus

ADAPTABLE ANALYTICS REQUIRED

This past year saw digital media's continued rise in prominence as part of peoples' personal lives and in business environments. Consumers are quickly becoming platform agnostic in their digital media consumption and in today's world they can choose when and how they'd like to consume content. It might be that they started watching a film at home on their TV, continued watching it on their smartphone on the way to work, and finished watching it in bed at night on their tablet.

It's the pinnacle of convenience for consumers, but an utter headache from an audience measurement and advertising analytics standpoint. comScore has adapted to this changing digital world to become a trusted resource for understanding cross-platform consumer behaviour and enabling multi-platform unification of all data.

Consumers have already adopted multiple platforms and devices – 2013 is the year businesses need to follow if they desire a unified, platform-agnostic view of consumer behaviour.



2013: Putting the Future in Focus

MULTI-PLATFORM TAKES CENTER STAGE

With the platform shift in full swing, businesses will be challenged in the coming year to stay ahead of consumers' usage curve and deliver them with the content they want, when and where they want it. It will also be imperative to maintain revenue streams in the core digital channels while capturing market share and monetizing emerging channels. Doing so will require businesses to get even smarter in how they scale their content to other platforms by developing integration strategies that deliver unique offerings to advertisers.

Integration between delivery of content and the ability to deliver campaigns in a multi-platform fashion remains a challenge, but the companies who facilitate this form of platform agnostic strategy will enhance value to marketers, simplify campaign management for agencies and foster greater pricing equilibrium between their content channels. As the bridge between traditional and digital platforms, online video will play an important leading role in how these integration strategies materialize.



2013: Putting the Future in Focus

VALIDATION MATTERS

According to ZenithOptimedia's Advertising Expenditure Forecasts, APAC is already the largest advertising market outside North America. Internet ad expenditure is set to overtake that of newspapers by the end of 2014. By 2015, online advertising will account for 21.9% of all adspend.

While delivering advertising at scale remains important, an increased premium on accountability and performance means advertisers may be sacrificing quantity for quality – whether that means leveraging more rich media, experimenting with larger ad units, or demanding ad viewability.

comScore's vCE benchmark study about viewable impressions over 1000's of campaigns, showed that an average of 54% ads were never actually seen by their target audiences. It is more important than ever for advertisers to evaluate campaign viewability to improve optimisation and maximise the return on their media spend.

Look for advertisers to demand more accountability and publishers to reconfigure site design and ad inventory to improve performance in the coming year.





- Asia Pacific accounts for 41% of the total online population, 644 million <http://cmssc.re/hGKMc> #FutureinFocus
- 16.1m, Vietnam has the largest online population in Southeast Asia <http://cmssc.re/hGKMc> #FutureinFocus
- Philippines is the fastest growing online audience in the region, grew almost 22% <http://cmssc.re/hGKMc> #FutureinFocus
- Non-PC traffic in South-East Asia zooms ahead, in excess of 20% <http://cmssc.re/hGKMc> #FutureinFocus
- 27.2 hours spent online by Thais in a month, highest average in SEA <http://cmssc.re/hGKMc> #FutureinFocus
- 74% of Vietnamese and Thai online population is under 35 yrs old <http://cmssc.re/hGKMc> #FutureinFocus
- 41.5% of PC screen time is spent on Social in the Philippines <http://cmssc.re/hGKMc> #FutureinFocus
- 3 of the top 15 Facebook markets by % reach are in SEA <http://cmssc.re/hGKMc> #FutureinFocus
- Non-resident Filipinos drive more than half of news website traffic in the Philippines <http://cmssc.re/hGKMc> #FutureinFocus
- Indonesia is the blogging capital of SEA, average 32.9 minutes spent on blogs per visitor <http://cmssc.re/hGKMc> #FutureinFocus
- 42 million Southeast Asians watch videos online <http://cmssc.re/hGKMc> #FutureinFocus

#FutureinFocus

METHODOLOGY

Methodology and Definitions

This report utilises data from the comScore suite of products, including comScore MMX Multi-Platform (Beta), comScore qSearch, comScore Video Metrix, comScore MobiLens, and comScore Device Essentials.

comScore MMX

The comScore MMX suite of syndicated products sets the standard for digital audience measurement and media planning. Powered by Unified Digital Measurement™, the revolutionary measurement approach that bridges panel-based and website server-based metrics to account for 100 percent of a site's audience, MMX delivers the most accurate and comprehensive suite of audience metrics, providing valuable demographic measures, such as age, gender, household income and household size. MMX reports on more than 70,000 entities, with audience measurement for 43 individual countries and 6 global regions, as well as worldwide totals.

The comScore MMX product suite includes individual products utilised within this report including [comScore MMX Multi-Platform \(Beta\)](#), [comScore qSearch](#), [comScore Ad Metrix](#) and [comScore Video Metrix](#).

http://www.comscore.com/Products/Audience_Analytics/MMX

ABOUT COMSCORE

comScore, Inc. (NASDAQ: SCOR) is a global leader in digital measurement and analytics, delivering insights on web, mobile and TV consumer behaviour that enable clients to maximise the value of their digital investments.

A preferred source of digital audience measurement, comScore offers a variety of on-demand software and custom services within its four analytics pillars: Audience Analytics, Advertising Analytics, Digital Business Analytics and Mobile Operator Analytics. By leveraging a world-class technology infrastructure, the comScore Census Network™ (CCN) captures trillions of digital interactions a month to power big data analytics on a global scale for its more than 2,000 clients, which include leading companies such as AOL, Baidu, BBC, Best Buy, Carat, Deutsche Bank, ESPN, France Telecom, Financial Times, Fox, LinkedIn, Microsoft, MediaCorp, Nestle, Starcom, Terra Networks, Universal McCann, Verizon, ViaMichelin and Yahoo!.

STAY CONNECTED

www.comscore.com

www.facebook.com/comscoreinc

www.linkedin.com/company/comscore-inc

www.youtube.com/user/comscore



#FutureinFocus

SEA Digital Future in Focus 2013

Key Insights from the last 12 months and the way forward

Email:

Media Requests: worldpress@comscore.com



www.comscore.com



www.facebook.com/comscoreinc



[@comScoreEMEA](https://twitter.com/comScoreEMEA)