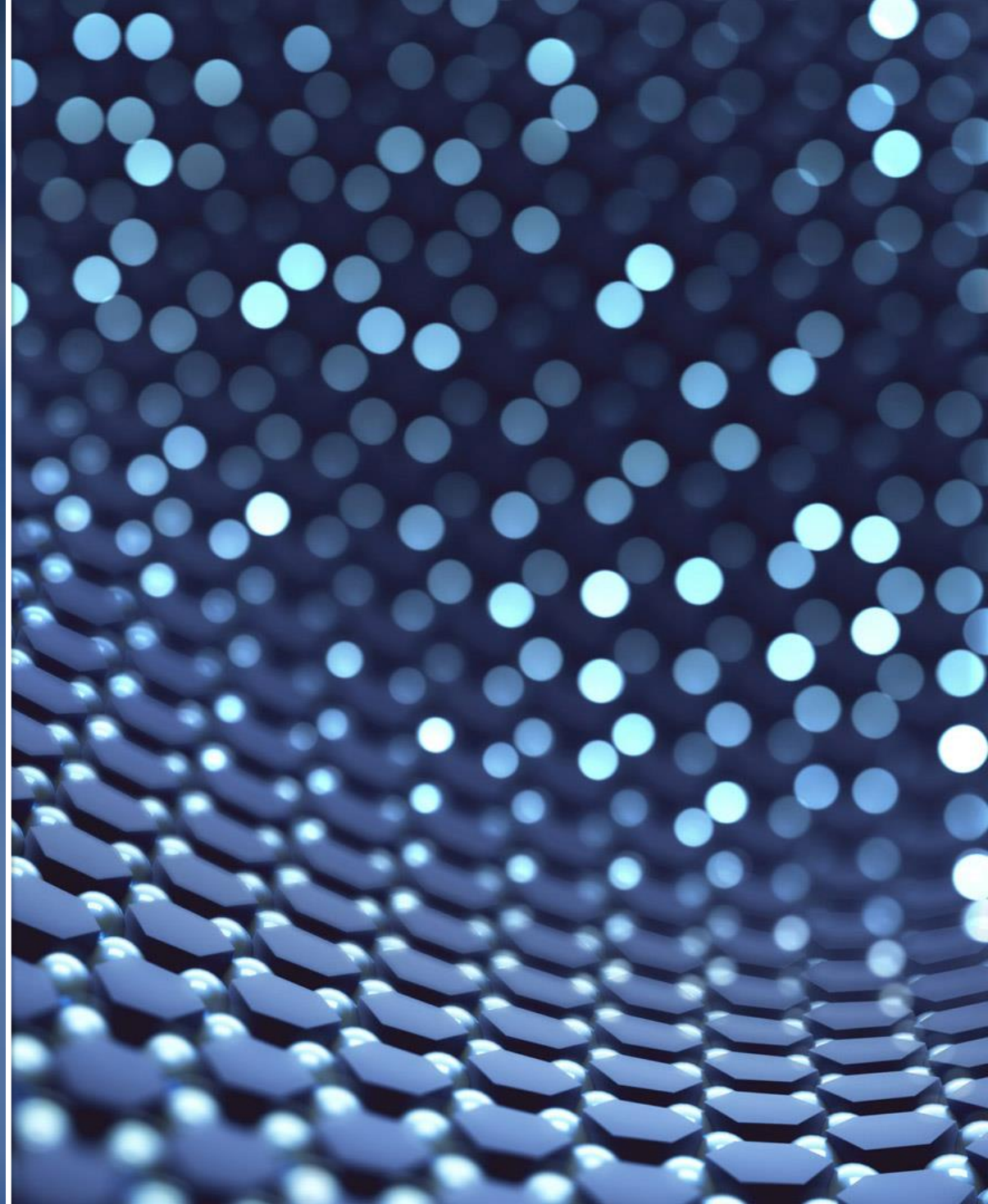


DIGITAL MARKETING TODAY

Joe Nguyen
Senior Vice President, Asia Pacific
comScore, Inc.

 @jnguyen @comscoreAPAC



THE DIGITAL
LANDSCAPE
IS MORE
GLOBAL
THAN EVER



'NON-US' HAS SOARED IN SIGNIFICANCE

In the 20 years since 1996, the proportion of non-US internet users measured by comScore has increased from 34% of the global desktop population to 89%

Global non-US
internet users

1996

2016



34%



89%

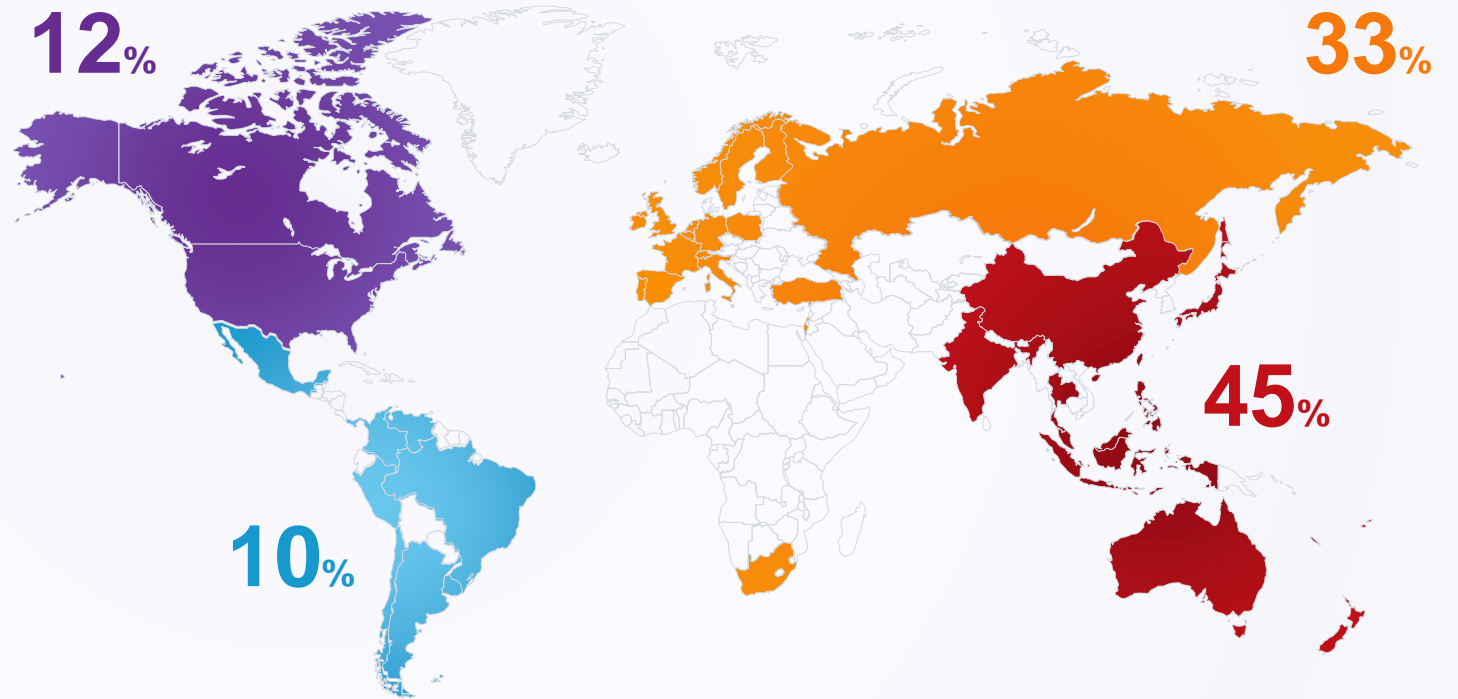
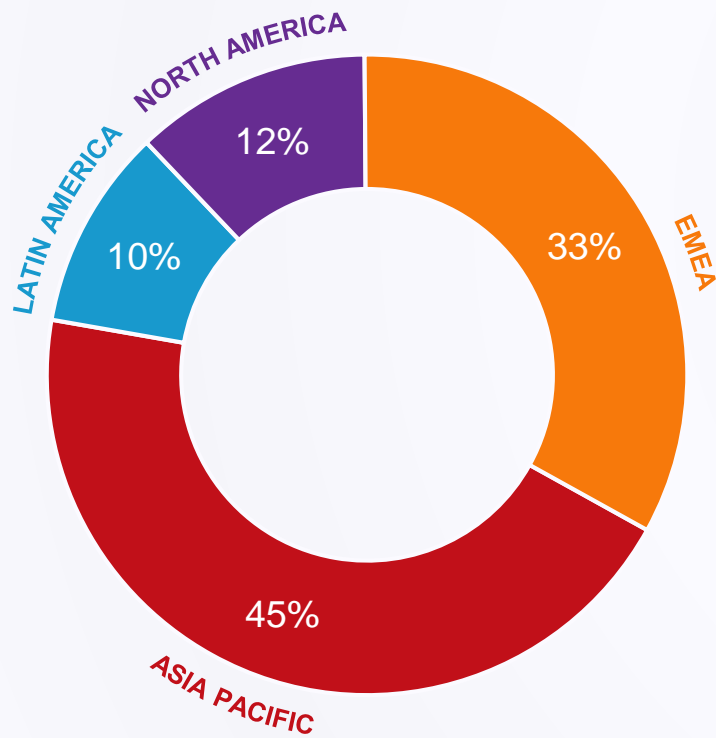


GLOBAL

APAC & EMEA DELIVER THE MAJORITY OF GLOBAL DESKTOP USERS

Over three quarters of desktop internet users are located in the two largest regions, with North America and Latin America almost reaching parity with one another

% of Global Desktop Audience



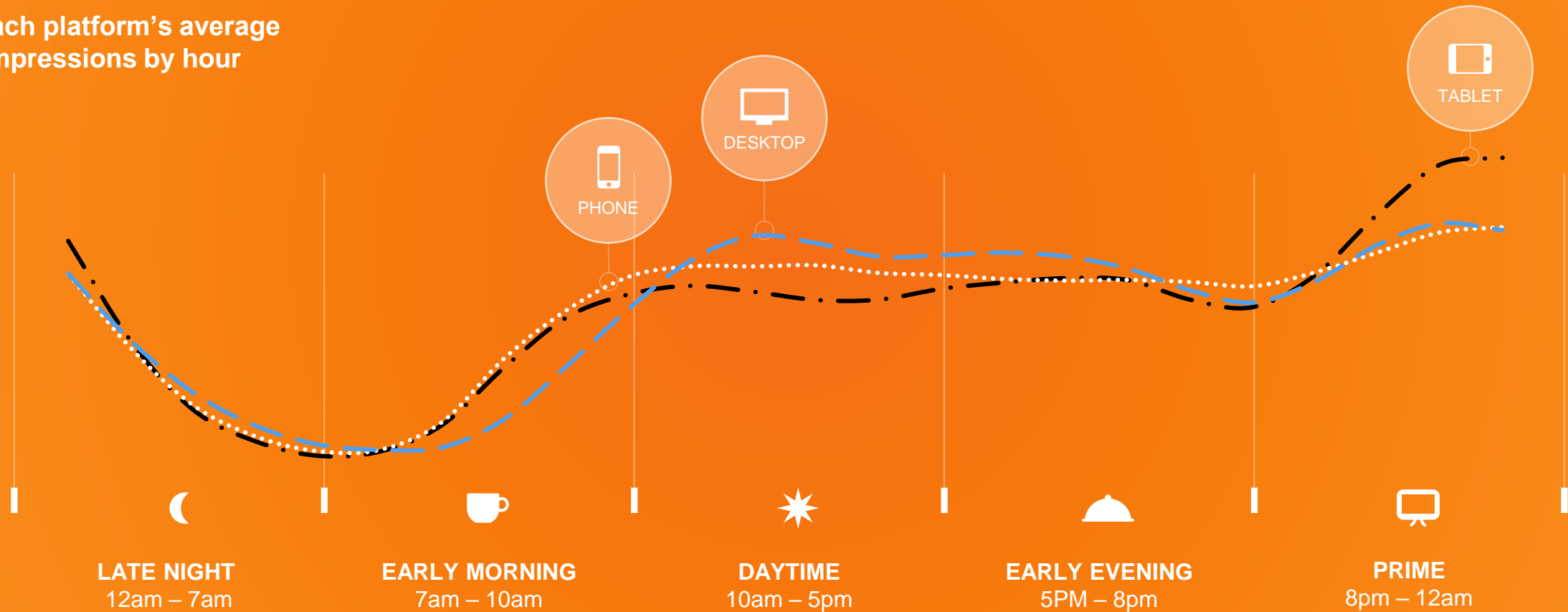
A MULTI-
PLATFORM
WORLD HAS
CHANGED HOW
WE USE DIGITAL
THROUGHOUT
OUR DAY



EACH PLATFORM ENJOYS 'PEAK' DAYPARTS

When looking at the percentage of each platform's daily impressions by hour, smartphones usage increases during morning commute, while desktop computers take up work hours. Tablets on the other hand, peaks in the evening

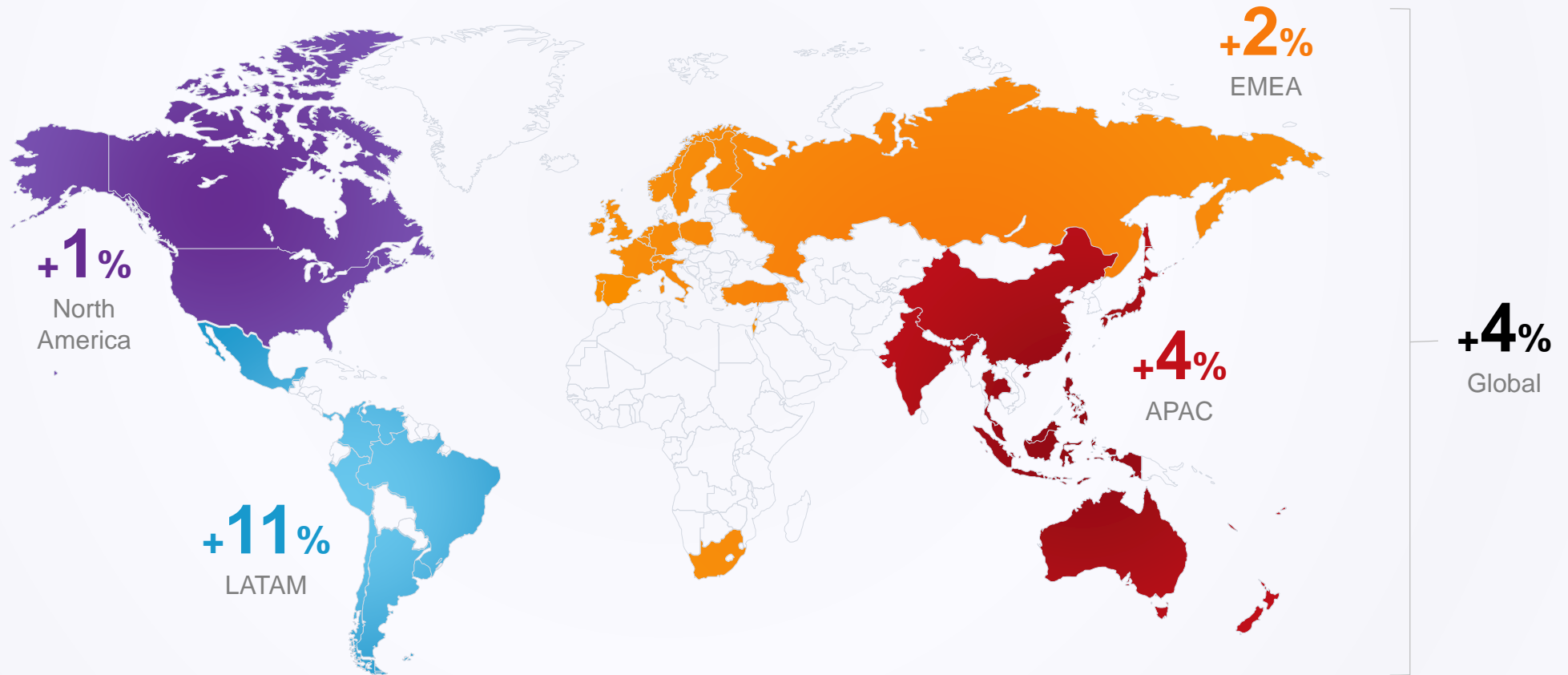
% of each platform's average daily impressions by hour



GLOBAL DESKTOP AUDIENCES ARE STILL GROWING

Despite the explosive growth of smartphone and tablet platforms, desktop audiences remain better than stable, showing incremental growth in all regions

Desktop Unique Users



FUNCTION / CONTENT DICTATE CONSUMPTION CHANGES

Taking data from Malaysia as an example, it's clear that less 'instant' categories such as travel and retail have continued to thrive and grow overall time on desktop, despite growing mobile ubiquity that has taken desktop minutes away from categories such as news

Total Minutes (mm)
June 2015 > June 2016



GULF OPENING BETWEEN HEAVY AND LIGHT DESKTOP USERS

Another side effect of a more fragmented media mix is the increasing behavioural differences between heavy and light desktop users, even on broad-appeal categories such as social media and travel

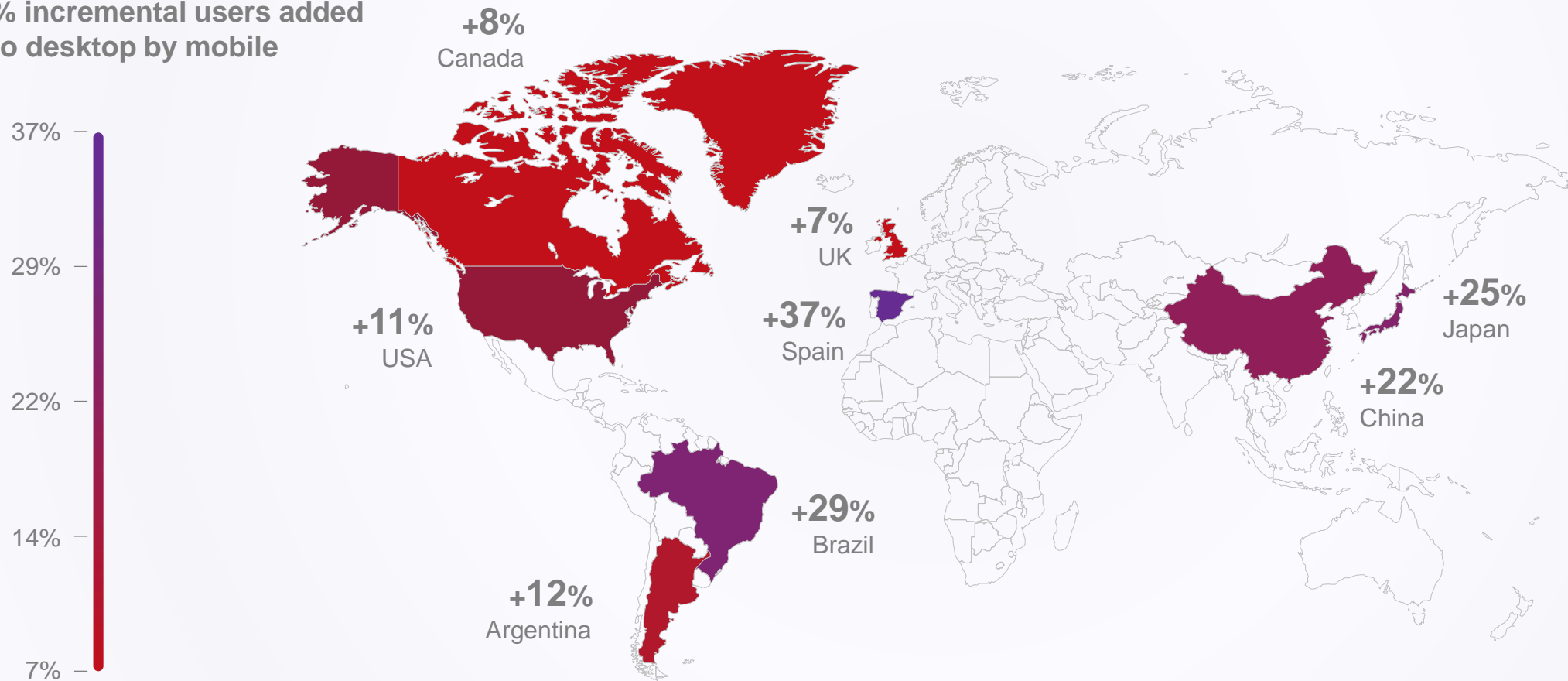


FRANCE

MOBILE HAS ADDED USERS WHO ARE NOT ACTIVE ON DESKTOP

The majority of consumers use mobile to complement desktop usage, but mobile adds incremental audiences that are not active on desktop. Of the selected markets featured, Spain and Brazil especially demonstrate that this is already a significant factor

% incremental users added to desktop by mobile

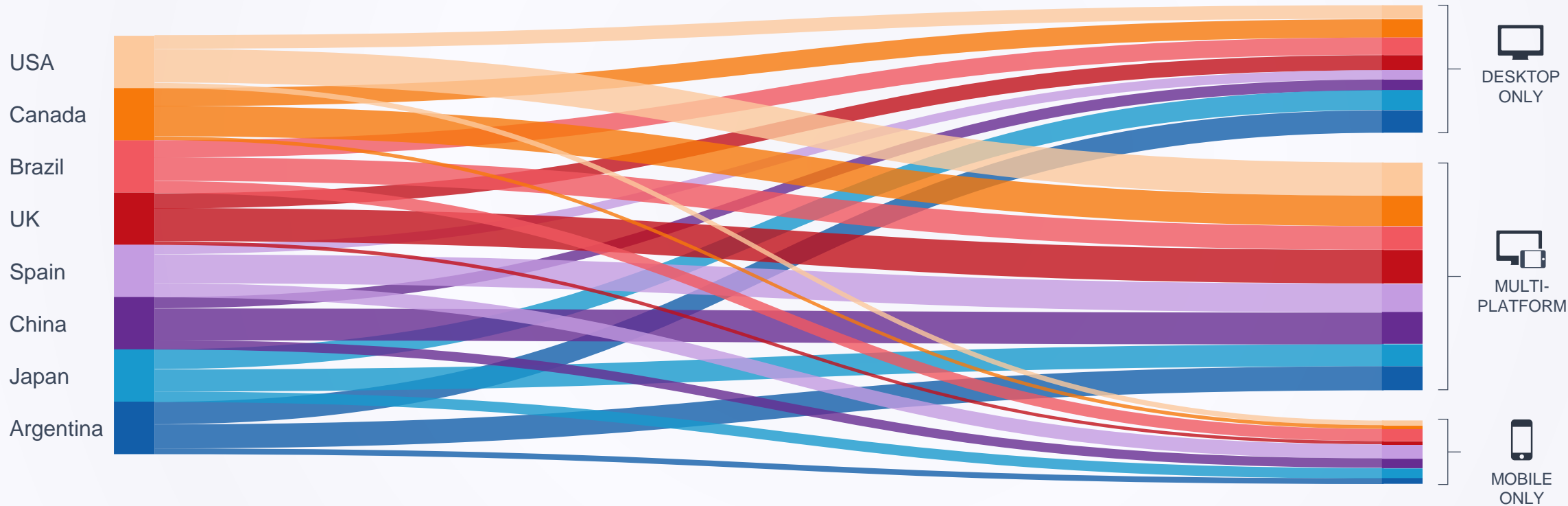


GLOBAL

DOMINANCE OF MULTI-PLATFORM MAJORITIES

Between the polar extremes of 'desktop only' and 'mobile only' usage, the overwhelming majority of users now use several platforms within a month

% of unique users



GLOBAL

YOUNGER USERS MORE LIKELY TO GO 'MOBILE ONLY'

In line with spending more minutes on average on mobile devices, younger users across the globe are more likely to abandon desktop altogether – 18 – 34 year olds lead the way in all regions when it comes to mobile only internet usage

Mobile only users

■ 18–24 ■ 25–34 ■ 35–44 ■ 45–54 ■ 55+



APPS HAVE
BECOME A CRUCIAL
BATTLEGROUND,
WITH HUGE PRIZES
AT STAKE

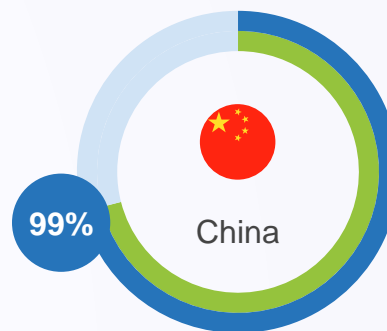
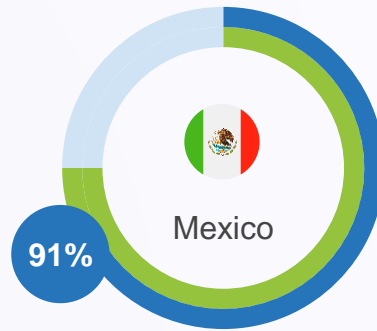
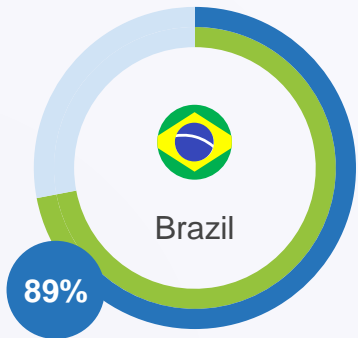
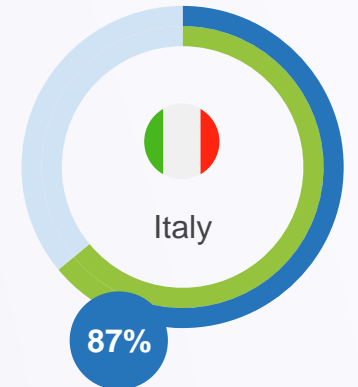
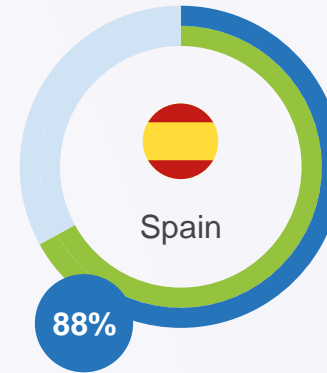
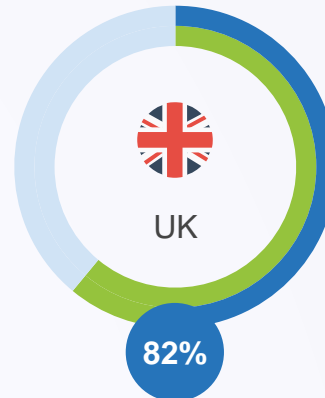
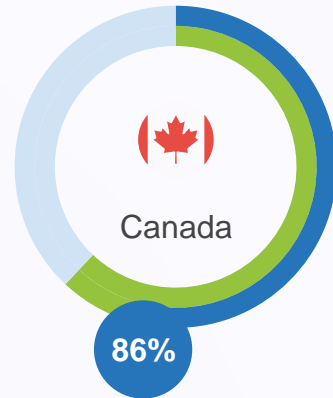
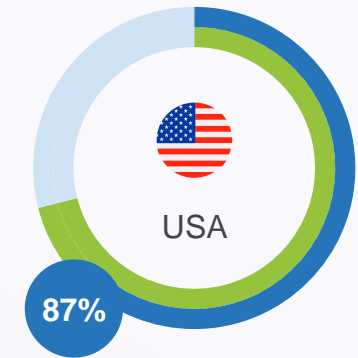


We are now firmly in the 'app age'

As consumers have come to rely on mobile devices in more aspects of daily life, the customisable and refined experience of apps have led to their dominance within mobile consumption

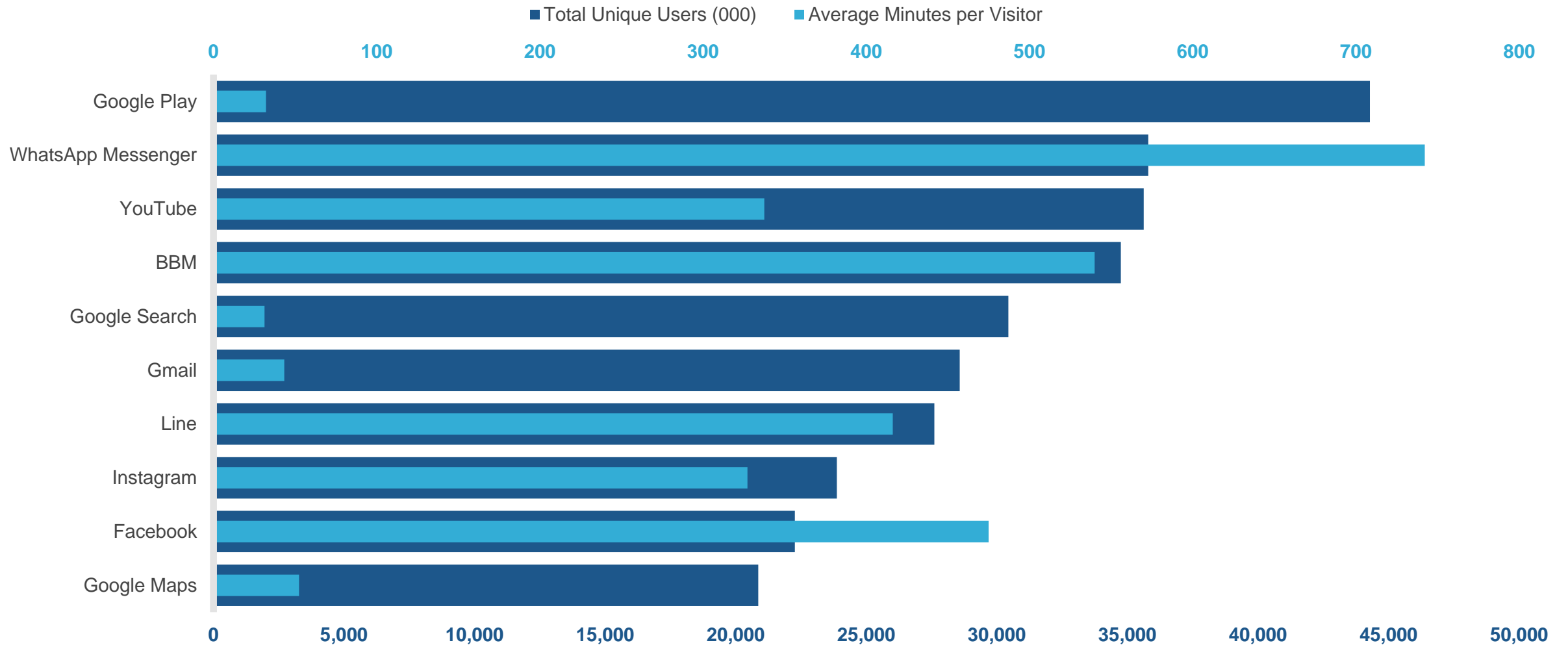
% Mobile Share of Total Digital Minutes

% App Share of Total Mobile Minutes



Indonesia: App engagement varies heavily with reach, messaging and social lead

Total Unique Users / Average Minutes Per User for Top 10 Apps by Reach



...SPECTACULARLY HIGH BEYOND 1ST DOWNLOADED APP IN MONTH

If a brand's app is not the first downloaded in a month, chances of an install drop dramatically, with significantly fewer users going on to download more than one app

% Downloading any number of apps in a month

% Downloading more than one app in a month



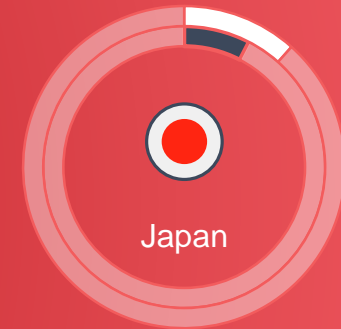
42%
32%



19%
13%



25%
17%



12%
8%



38%
27%



28%
18%



6%
19%

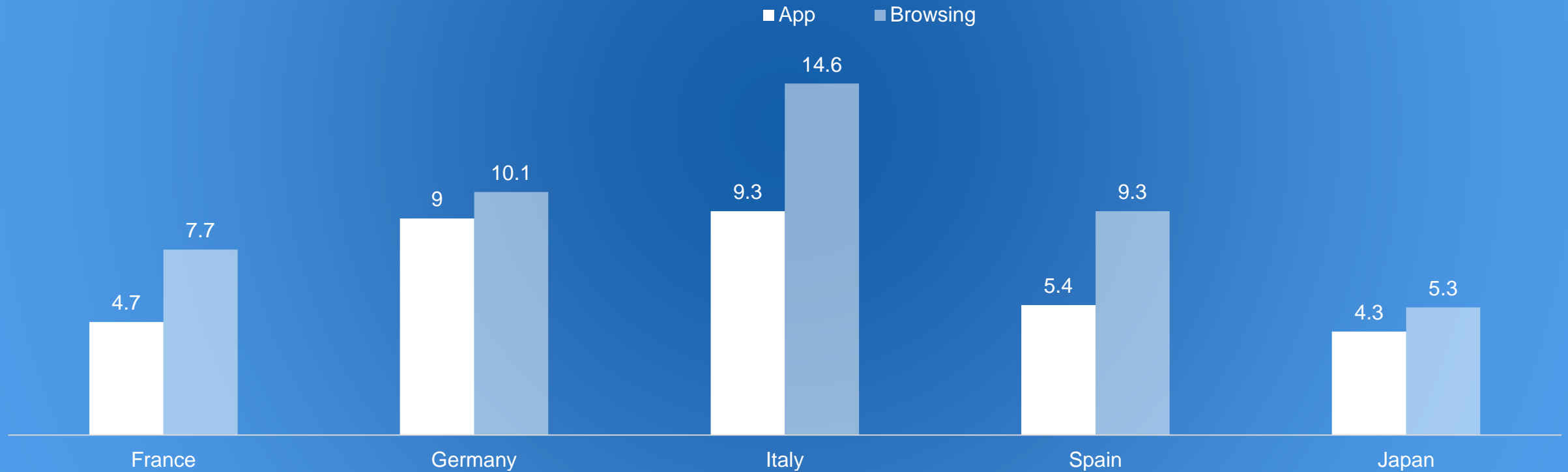


36%
26%

PURCHASING VIA APP APPROACHING MOBILE BROWSING LEVELS

Consumers are increasingly turning to apps to make mobile purchases, although brands are yet to translate overwhelming time into greater share of sales vs. mobile browser

% of consumers making purchases on mobile devices via web / app



HOW HAS THE TRAVEL INDUSTRY EVOLVED WITH THIS TRANSFORMATION?



Airlines



National Tourism Organisations



Online Travel Agents



Traditional Travel Agencies



Hotels

Thank you!

Joe Nguyen
Senior Vice President, Asia Pacific
comScore, Inc.
 @jnguyen @comscoreAPAC
comscore.com/learnmore

