

Understanding Malaysia's Online Audience in 2016

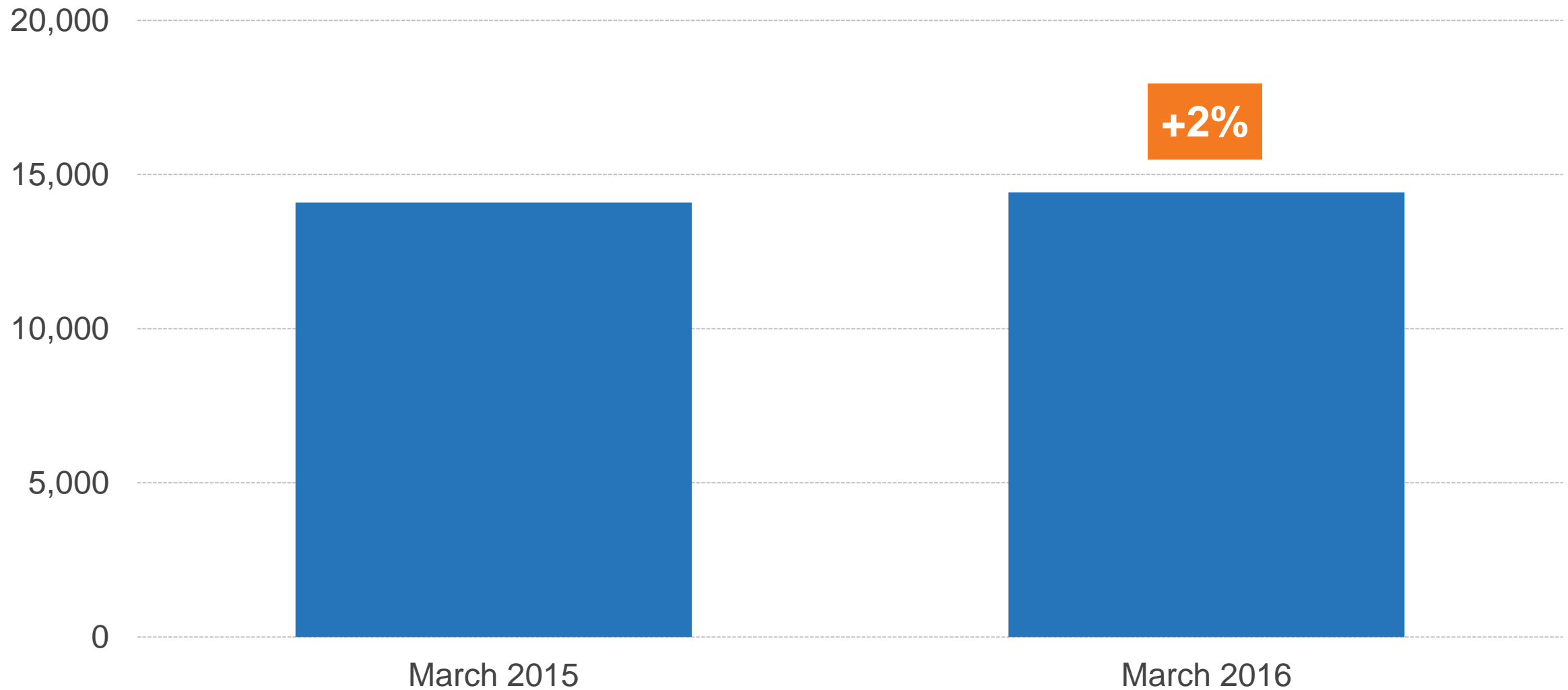
Joe Nguyen

Senior Vice President, Asia Pacific, comScore, Inc.

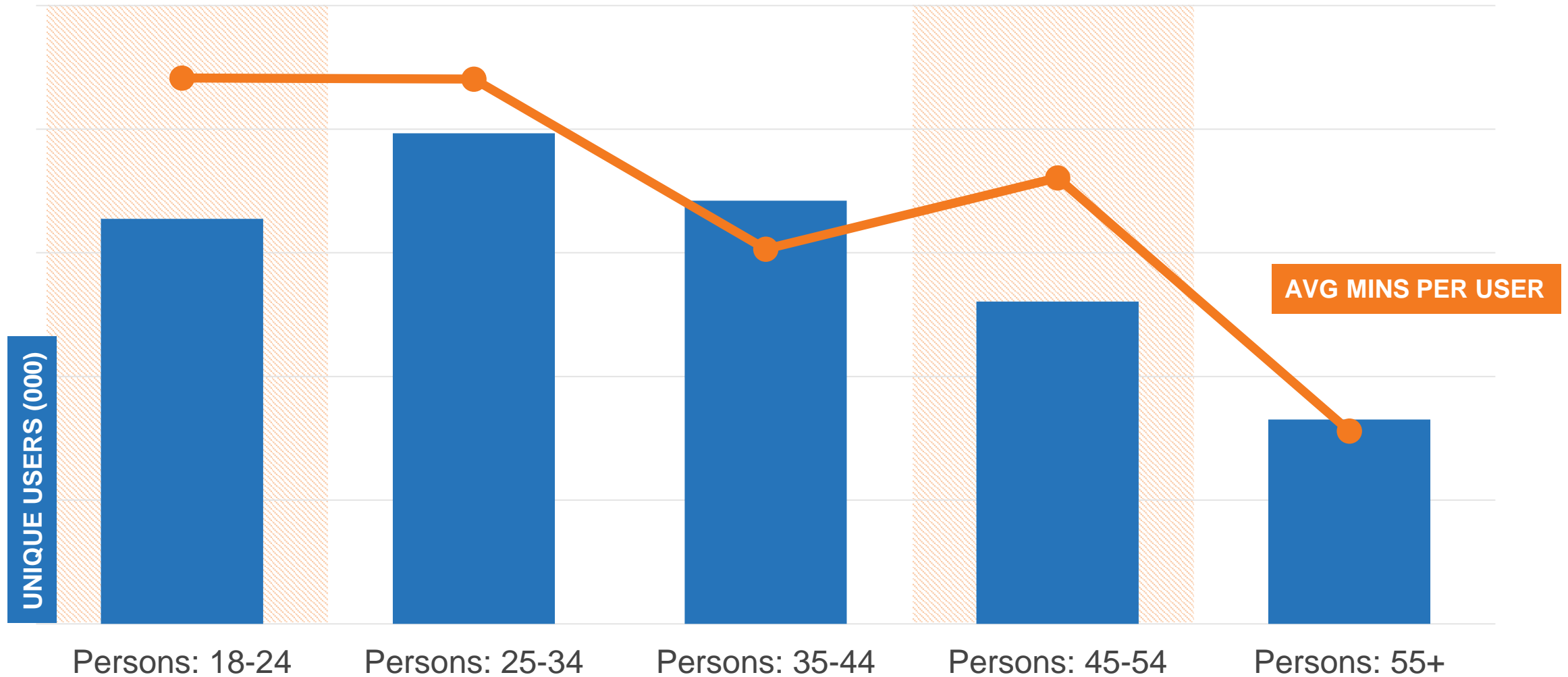
 @jnguyen @comScoreAPAC



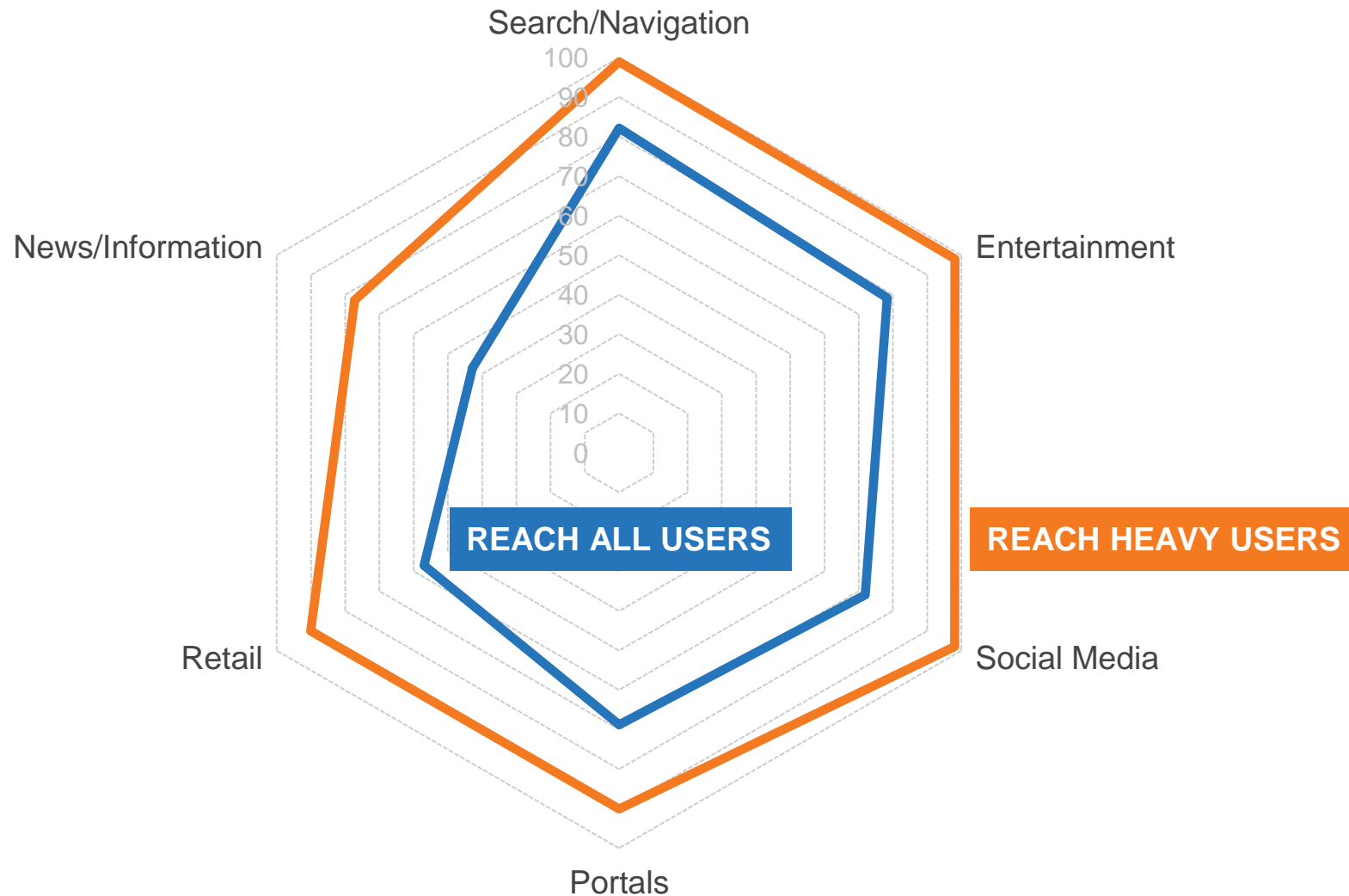
No decline in desktop audiences despite mobile growth



No even correlation between scale vs. engagement

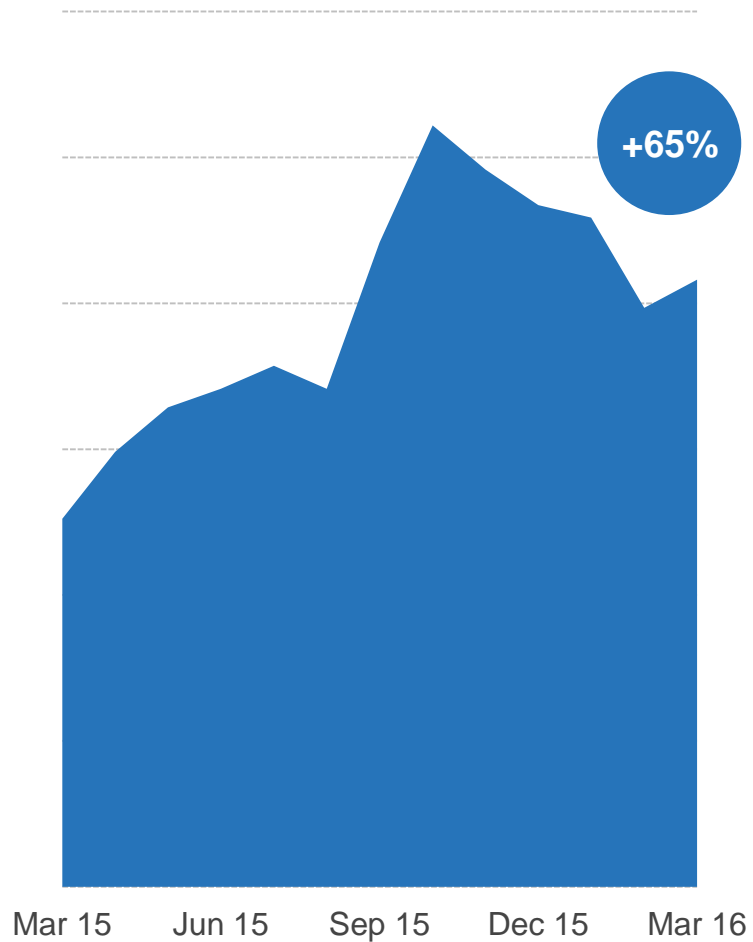


Even at high level, differences between all vs. heavy users

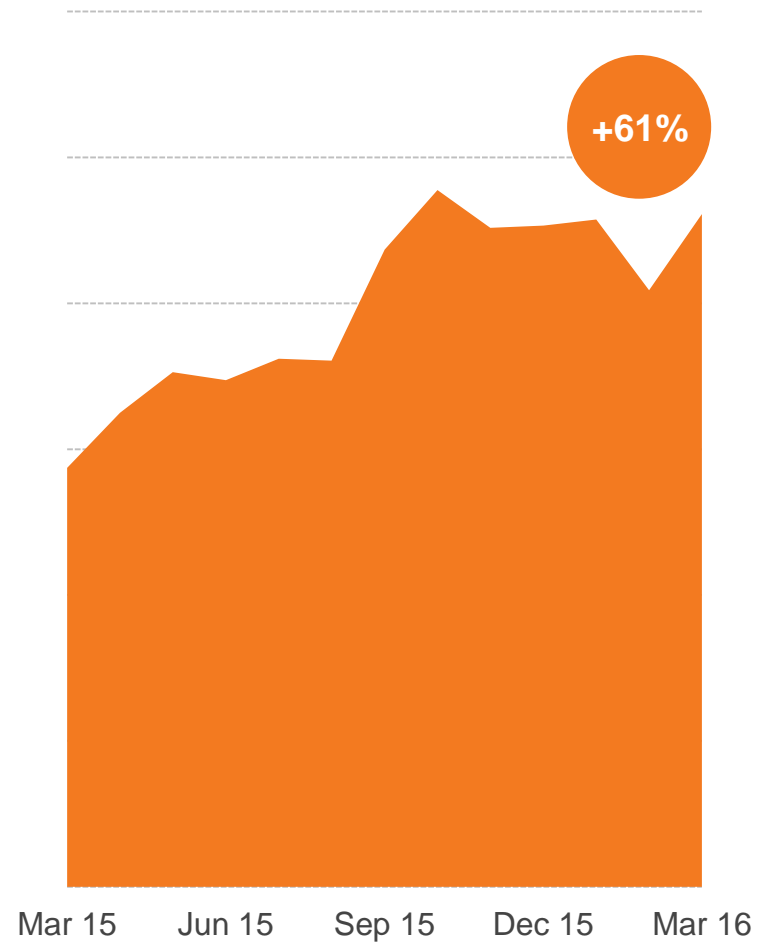


Video grows rapidly (driven by shorter-form & ads)

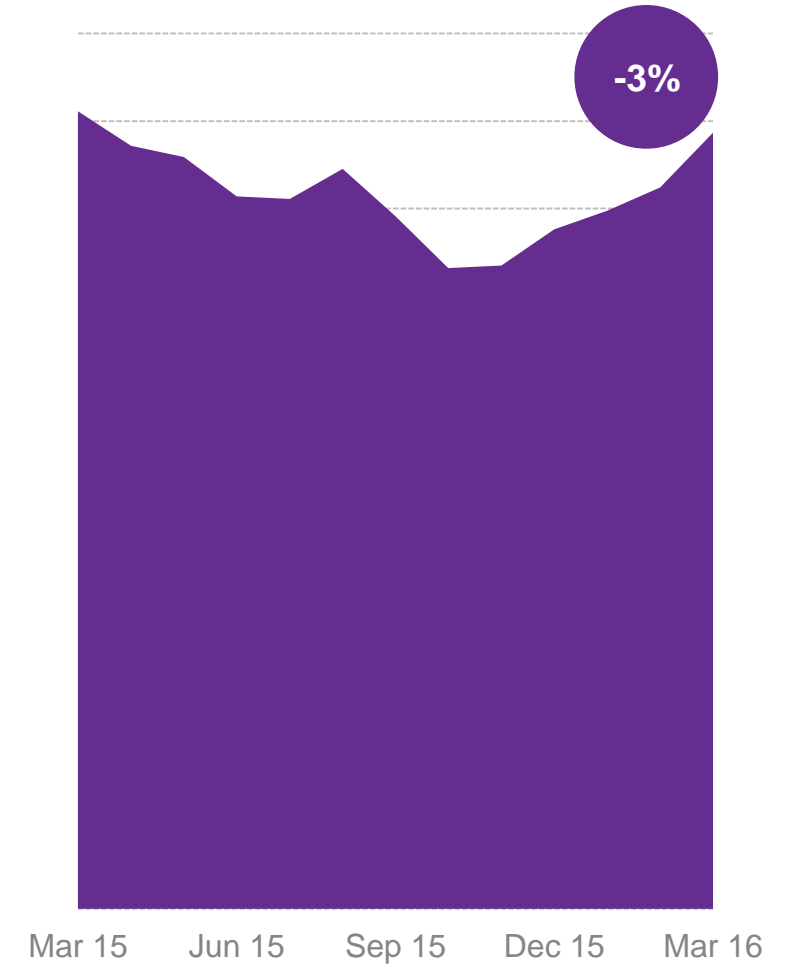
Videos (000)



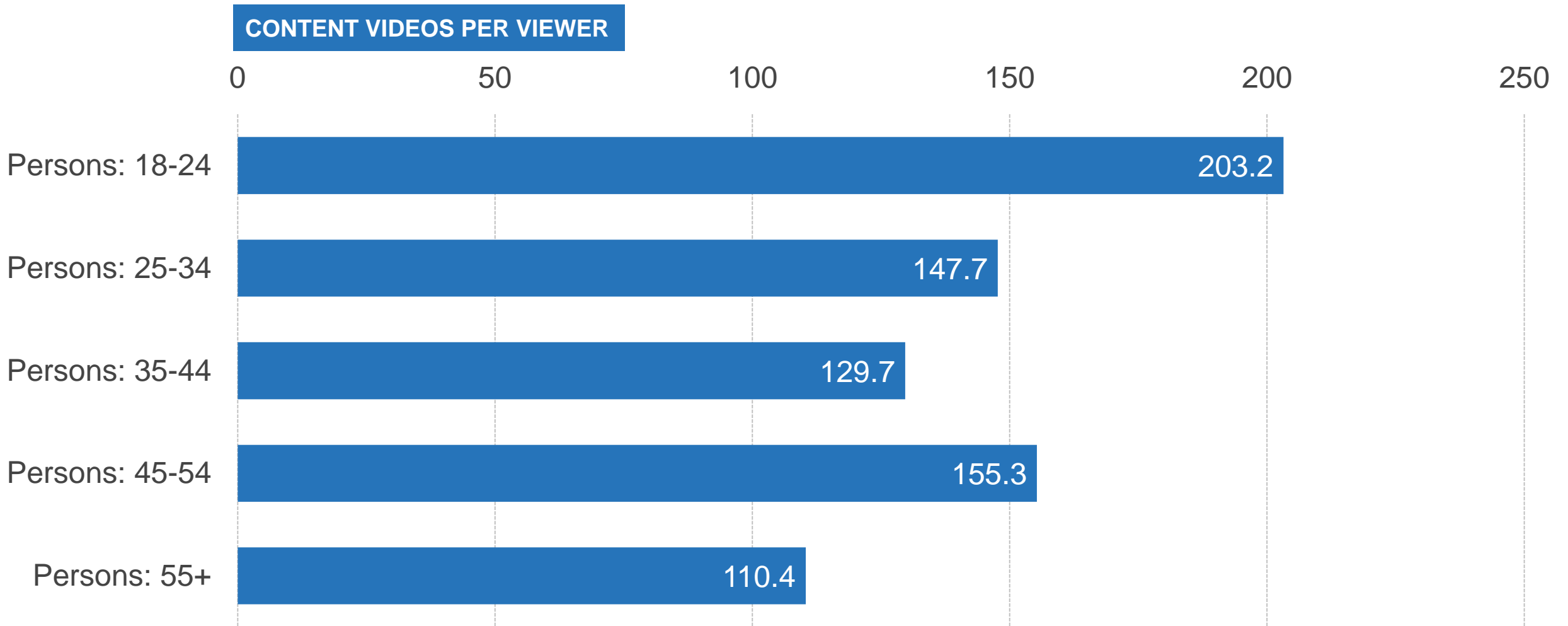
Total Minutes (MM)



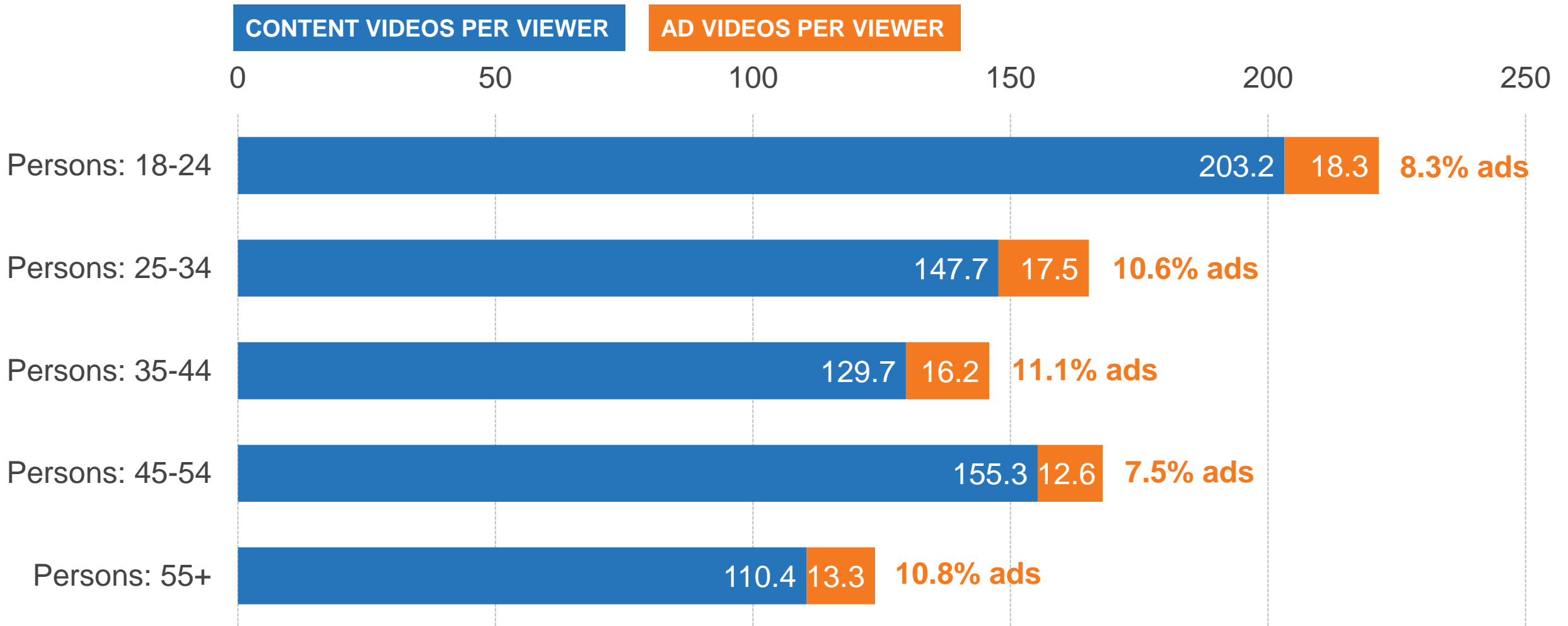
Minutes per Video



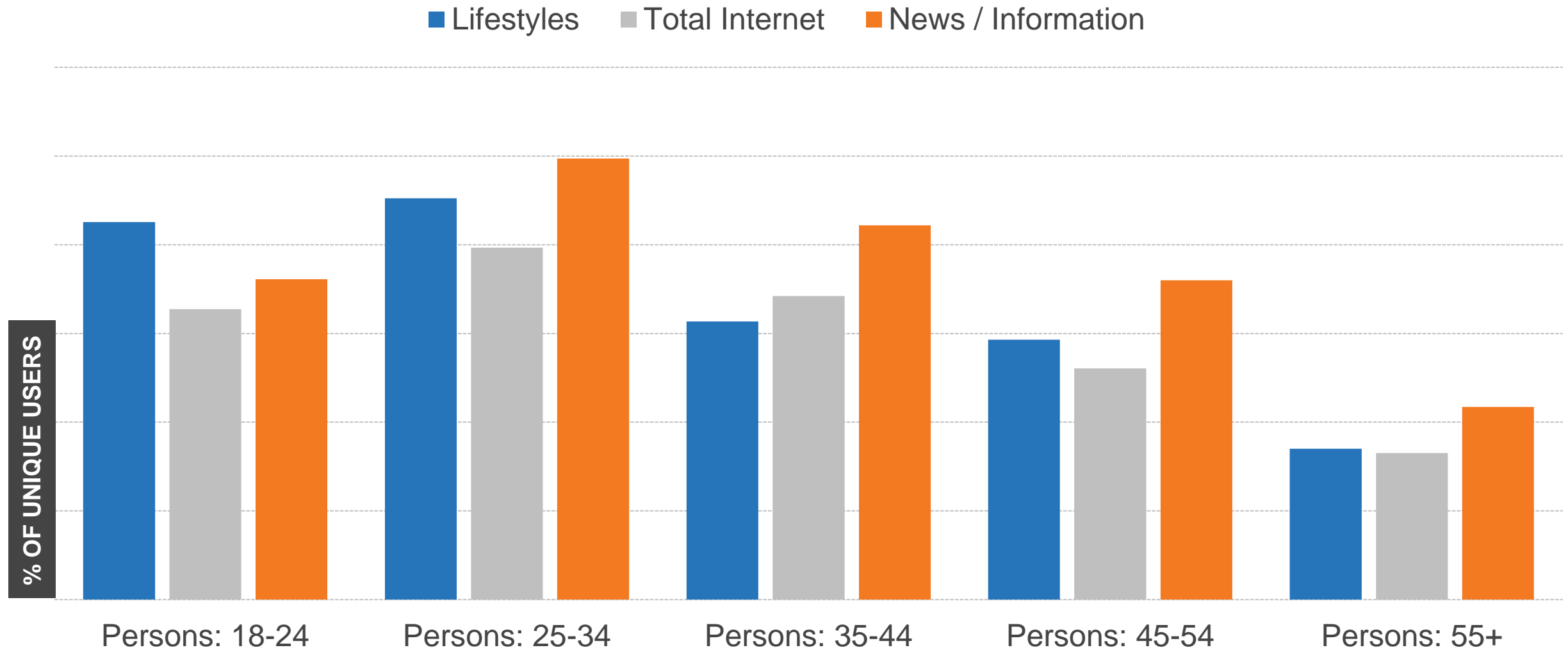
Video content engagement led by younger users



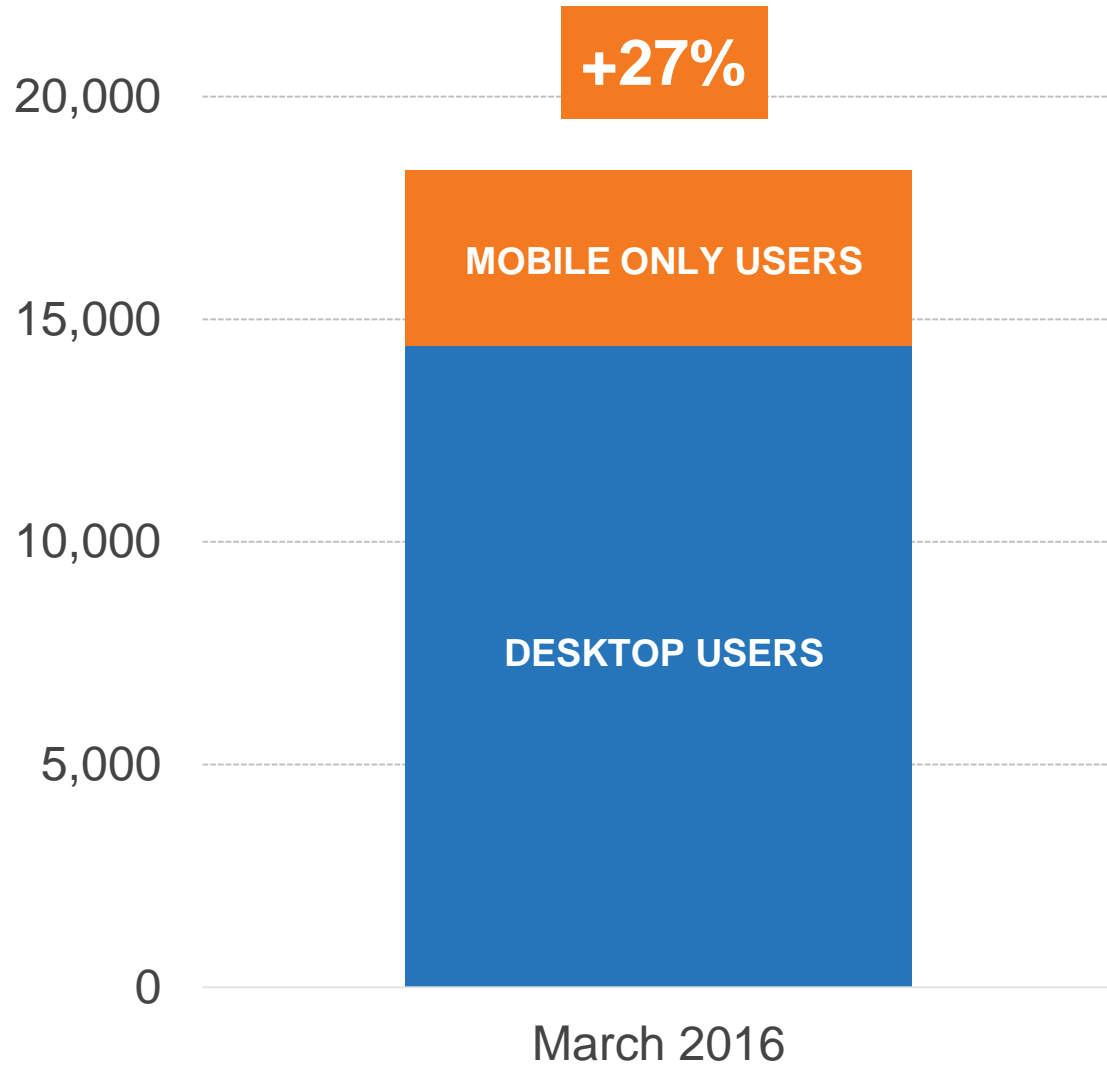
They also see most ads (but at a smaller % of total videos)



Video category imbalances can unlock audiences



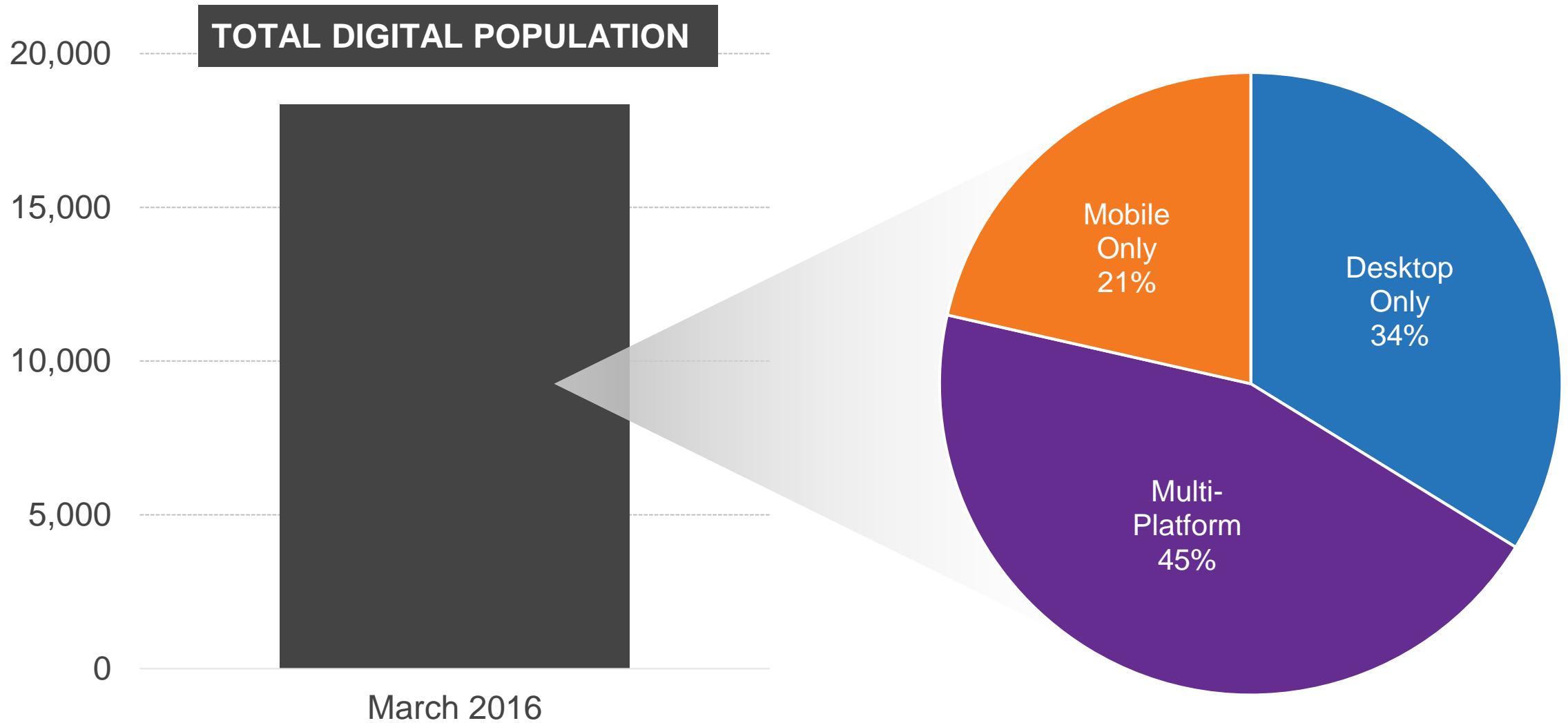
Mobile adds 27% incremental users to desktop audience



Source: comScore MMX Multi-Platform, Malaysia, March 2016

Note: Mobile Metrix in Malaysia uses comScore's census-based methodology that reports on only tagged entities. Properties which only tag some of their assets (e.g. website but not app) or partially tag (e.g. homepage only) will only be measured on those tagged assets, which will have an impact on the total reported metrics of their entity.

But multi-platform usage is the new 'normal'



TOTAL DIGITAL POPULATION

20,000
15,000
10,000
5,000
0

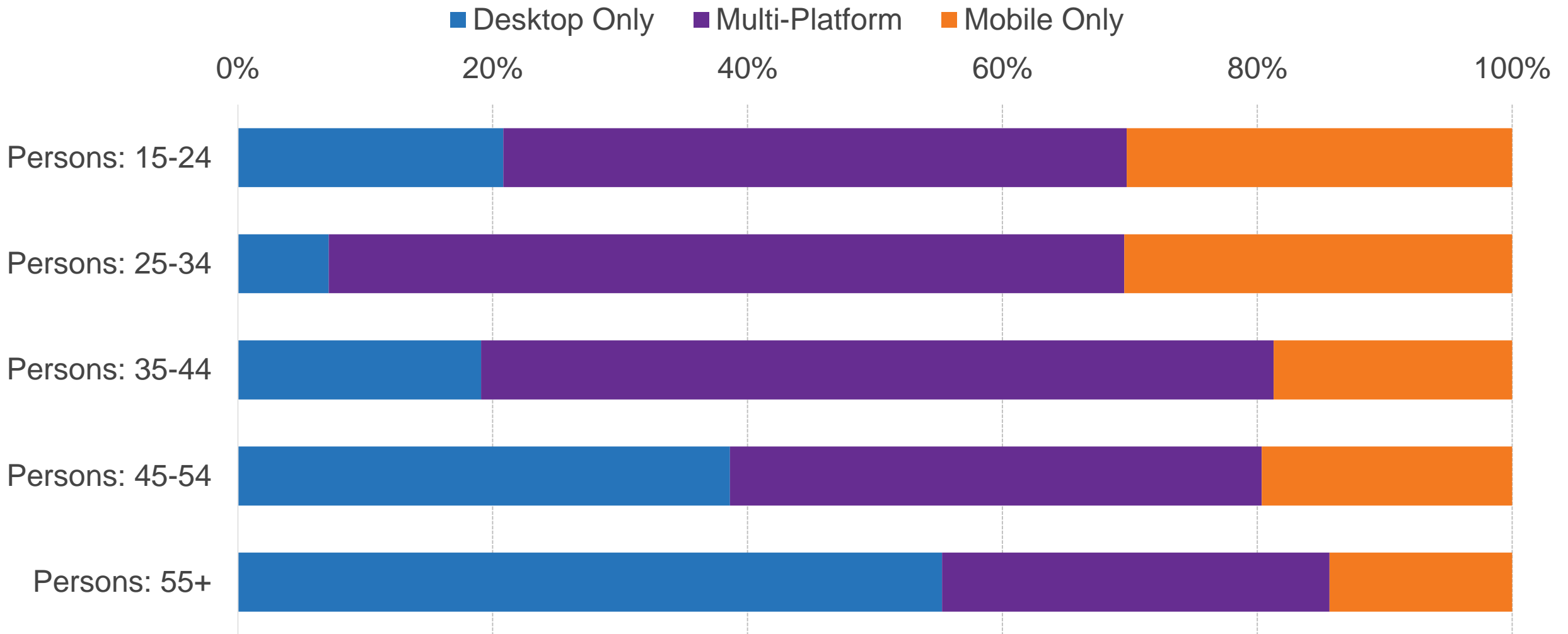
March 2016

Mobile Only
21%

Desktop Only
34%

Multi-Platform
45%

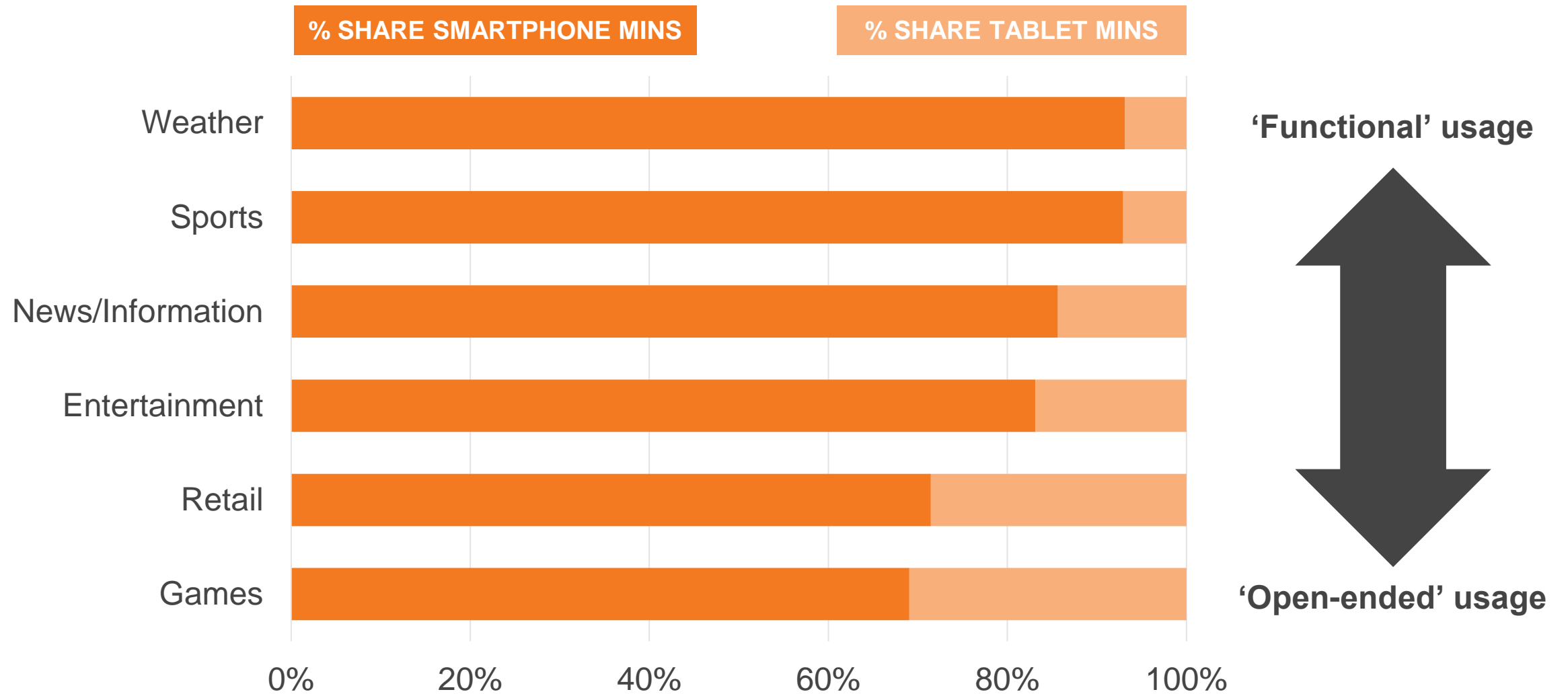
The move to mobile and multi-platform varies by demo



Source: comScore MMX Multi-Platform, Malaysia, March 2016

Note: Some markets use a census-based methodology for Smartphone and Tablet measurement, that reports on only tagged entities. Properties which only tag some of their assets (e.g. website but not app) or partially tag (e.g. homepage only) will only be measured on those tagged assets.

Mobile platform choice dictated by function



Source: comScore Mobile Metrix, Malaysia, March 2016

Note: Mobile Metrix in Malaysia uses comScore's census-based methodology that reports on only tagged entities. Properties which only tag some of their assets (e.g. website but not app) or partially tag (e.g. homepage only) will only be measured on those tagged assets, which will have an impact on the total reported metrics of their entity.

comScore introduces ethnicity as new demographic variable in MMX & Video Metrix for Malaysia with June 2016 data

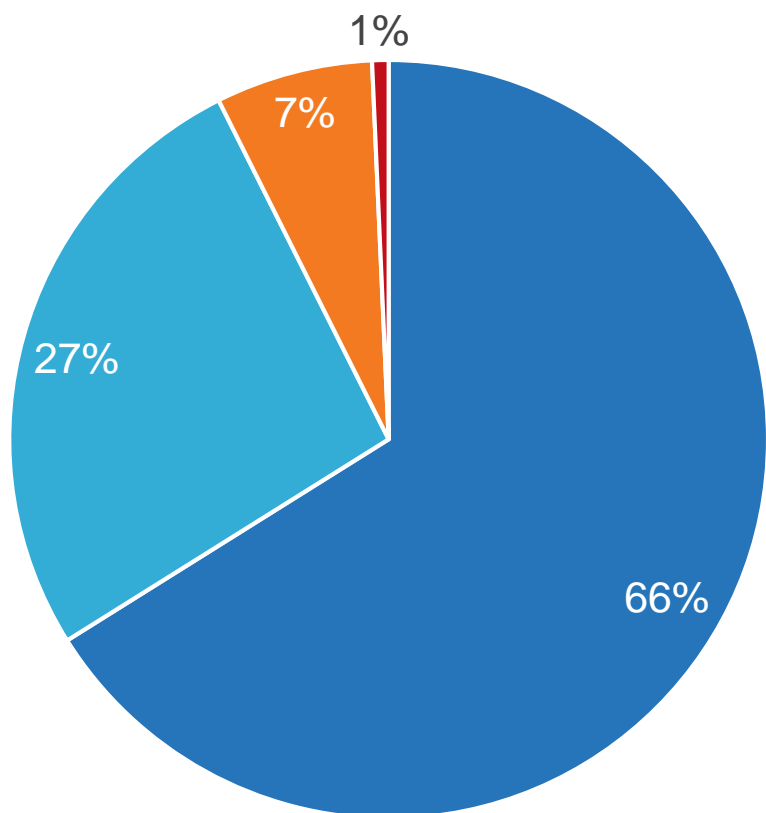
SAMPLE ONLY

SELECT ETHNICITY TARGETS

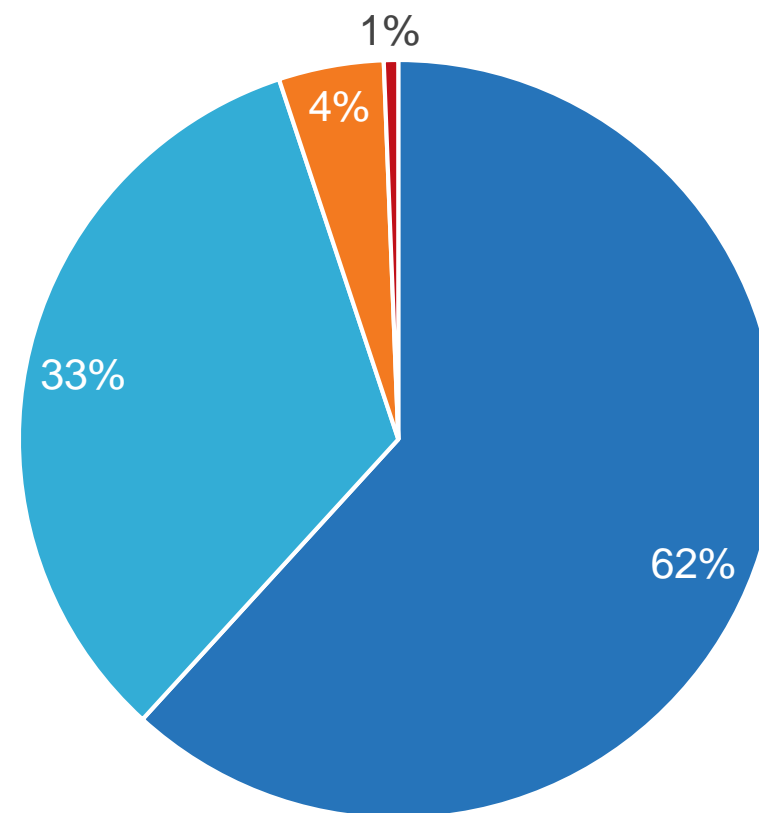
Persons - Age	Males - Age	Females - Age	Region	Children	HH Size	Ethnicity
All	All	All	Central Region	No	1	Malay and Bumi
15+	15+	15+	Southern Region	Yes	2	Chinese
18+	18+	18+	East Coast		3	Indian
25+	25+	25+	Northern Region		4	Other
35+	35+	35+	Sabah		5+	
45+	45+	45+	Sarawak		1-2	
6-14	6-14	6-14			3+	
15-17	15-17	15-17				
15-24	15-24	15-24				
18-24	18-24	18-24				
25-34	25-34	25-34				
35-44	35-44	35-44				
45-54	45-54	45-54				
55+	55+	55+				

Sample data only: Ethnicity composition – total Internet vs. select publishers

Total Internet (Unique Visitors)



Select Publishers (Unique Visitors)



- Malay and Bumi
- Chinese
- Indian
- Other

Key Takeaways

- The desktop is not dead, but the landscape has changed
- It is now more vital than ever to understand what makes key user segments / demographics unique on each platform
- Video is leaning towards shorter-form content on desktop, advertising saturation is increasing
- Multi-platform consumption presents new opportunities, but also new considerations for both content and advertising
- Malaysia MMX and Video Metrix will report ethnicity starting with June 2016 data

Thank You

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