nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™

MEET THE NEW MEDIA CONSUMER

IN VIETNAM

2014

MEDIA JOURNEY OF THE FUTURE

RIGHT **TIME**

RIGHT **PLACE**

RIGHT **SCREEN**

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MEET THE NEW MEDIA CONSUMER IN VIETNAM

MORE CONNECTED

VIETNAMESE ARE CONNECTED **15.5** HOURS A WEEK

ONLINE CLOSE TO **3DAYS** A WEEK

INTERNET ACCESS VIA SMARTPHONES HAS **QUADRUPLED** IN 3 YEARS

INTERNET ACCESS VIA LAPTOPS HAS MORE THAN **DOUBLED** IN 3 YEARS

MORE DEVICES

TOP 4 DEVICES ARE

- SMART PHONES
- LAPTOPS
- DESKTOPS
- SMART TV

SMARTPHONE OWNERSHIP HAS INCREASED MORE THAN **SEVENFOLD** (11% TO 82%)

4 IN 5 ONLINE VIETNAMESE ARE **TRIPLE SCREENERS**

ANDROID OVER iOS

MORE PLACES

CONSUME MEDIA MOST OFTEN AT **HOME, IN THE OFFICE AND INTERNET CAFÉS**

TOP 5 ONLINE VIDEO SOURCES

- **YOUTUBE**
- **24H**
- **NGHE NHẠC CỦA TU**
- **VNEXPRESS**
- **DANTRI**

MORE VIDEOS

9 IN 10 WATCH VIDEOS ONLINE WEEKLY

THEY **STREAM** MORE OFTEN THAN THEY DOWNLOAD

ONLINE VIEWING HAS STRONG PEAKS DURING **LUNCH AND EVENING**

RECEPTIVE TO **VIDEO** ADVERTISEMENTS

HIGHEST AD RECALL FOR THESE CATEGORIES:

- AUTOMOTIVE
- BEVERAGES
- TRAVEL
- FOOD
- TOILETRIES/COSMETICS

EXECUTIVE SUMMARY

MEET THE NEW MEDIA CONSUMER IN VIETNAM

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EXECUTIVE SUMMARY

The rise of time spent online is transforming media consumption habits and driving greater engagement with content throughout the day.

The digital landscape has undergone tremendous change in the past few years. We have entered a 'new' new media environment with the arrival of smartphones and tablets, the mainstream adoption of social media and the delivery of video content via the online channel. Consumers will gravitate toward "content convenience", highlighting the importance of cross-media and cross-platform content and marketing strategies to maximise both reach and resonance.

Consumers' increasing cross-media and cross-platform behaviours, and the convergence of physical and digital worlds, means no one media can be viewed on its own. This study of cross-platform behaviours and attitudes follows the digitally engaged consumer and their content consumption habits; across media, screens and devices.

The Vietnam Cross-Platform Report 2014 delivers a comprehensive view of current media behaviour among digitally-engaged consumers. This report will inform your strategy and practice for today; and provide a sign post to help you look and think ahead to plan for tomorrow.

Four key themes are highlighted in this year's study.

1. RISING CONNECTIVITY IS DRIVING BEHAVIOURAL CHANGE

There are now three mainstream connection devices: desktops, laptops and smartphones. Ownership of smartphones and laptops has followed a steep growth curve since 2011 and both devices are now in the hands of the majority of online consumers (82% and 81% respectively). During the same time desktop ownership remained flat (75%) while tablets are now in 35 percent of online consumers' homes. New connected devices are emerging such as connected TVs; but consumption of online content via these screens is extremely low.

Both smartphones and laptops have seen rapid adoption as facilitators of content and interaction, surpassing desktops for online access and growing more than three-fold as the connected devices most often used by online consumers in Vietnam.

More consumers are connected at any given point of the day than ever before. Former dominant media are now in the shadows of online media consumption among Vietnam's digitally engaged consumers. Digital media is also helping to extend the media day into the late evening with close to six in 10 (58%) digital consumers still online after 10pm.

DIGITAL DRIVERS IN VIETNAM

CONTENT

CONVENIENCE

CONTROL

The desire for more content options is driving consumers to source online-delivered content that was traditionally the domain of TV, print and radio media, to access content on connected devices that afford anytime, anywhere access, and to embrace new platforms such as social media, that offer high utility and access to unique forms of content and interaction.

Consumers can source the content they want in the way that is easiest for them, resulting in a more complex combination of media journeys across different channels, devices, screens and platforms. While this is more challenging to follow, it delivers marketers with greater opportunity for "right place – right time – right screen" tactics throughout the journey, and across a broader range of marketing environments. It also highlights the importance of creating content that is easy to find, easy to share and easy to digest.

3. ONLINE VIDEO CONSUMPTION IS ON THE RISE

Internet-sourced TV content has grown in adoption; 67 percent of online Vietnamese now watch internet TV as conventional TV habits are shifting.

Online video consumption is growing steadily among the total population, but most rapidly among young consumers. More than nine in 10 16–20 year olds (94%) and 21–29 year olds (93%) access video content through online sources on a weekly basis or more often.

The rise in mobile and portable devices is driving video consumption, facilitating more access occasions for rich content. Video consumption via mobile phone and tablet has seen massive growth since 2011, off an extremely low base.

4. THERE IS A GROUNDSWELL OF CONSUMER CONTROL AND CHOICE

"Lean back" is no longer the behaviour of the majority of media consumers. They are exercising their choice of how, when and where they can obtain their content, information, and experiences, and are more active in their media habits than ever before. This is evidenced not only by the increasing adoption and use of new and more media devices, but also in consumers' cross-media consumption behaviour. Dual-screening has become routine and triple-screening has emerged. We are moving to a world of everything-on-demand, of borderless media; and as consumers continue to embrace online media it is providing them with increasing control and choice over their media experiences.

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BACKGROUND & INTRODUCTION

BACKGROUND AND INTRODUCTION

STUDY AIMS

The Vietnam Cross-Platform Report 2014 provides a comprehensive view of the way Vietnamese consume digital media in today's cross-platform environment. It aims to equip companies with an understanding of the new and evolving digital landscape, the increasing cross-platform opportunities and help them finesse their strategies in line with the needs and expectations of today's connected consumer.

With increasing cross-media and cross-platform behaviours, and the convergence of physical and digital worlds, no one media can be viewed in a silo. This study follows the consumer and their content consumption habits; across media, screens and devices.

Building on Nielsen's first large scale study of digital consumers in Southeast Asia, conducted in 2011, this next instalment provides historical trending information, analysis by demographic segments, and explores both behaviours and attitudes toward content access and associated advertising.

The research aims can be summarised as follows:

- Provide a comprehensive view of how content is consumed across multiple devices and multiple screens, particularly video formats
- Understand patterns of behaviour across multiple media and multiple platforms
- Gauge the impact of 'digital disruption' on other media and on today's media consumers

OVERALL APPROACH AND METHODOLOGY

The study has been conducted in six Southeast Asian markets: Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam, as well as India. In all markets, a sample of 1,000 frequent* online users aged 16 years and above has been captured using an online survey methodology. Participants were sent an email and invited to complete the online survey. They could do so via any connected device.

Quotas were set based on key demographic variables based on Nielsen's Consumer & Media View data to ensure a sample representative of the frequent online population in each market.** In Vietnam quotas were set for age, gender and location, and the data has been weighted in order to deliver a completely representative sample.

The study focuses on the online population. There is no analysis of the behaviours or profile of consumers who do not use the internet.

All responses were collected during April and May 2014 with the exception of India (conducted during June 2014). Trending analysis compares 2014 with 2011.

*Frequent online user is defined as having used the internet in the past month.
**Please note, in Vietnam and India quotas were based on proprietary Nielsen research.

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ANALYSIS

The report contains detailed data tables which can be used for an in-depth examination of specific audience segments.

Please note:
Due to the rounding of the data to whole percentages, the total percentages presented in some tables and figures may be slightly above or below 100 percent in the report. Unless of notable importance, "Don't Know" and "Refused" responses have been excluded from corresponding graphs and tables.

For further details, please contact your Nielsen Account Manager or the cross-platform leader of Nielsen Southeast Asia:
Nancy Jaffe (nancy.jaffe@nielsen.com).

SAMPLE (n=1,069)

	PROPORTION OF SAMPLE
Gender	
Male	56%
Female	44%
Age	
16 to 20 years	14%
21 to 29 years	55%
30 to 39 years	18%
40 to 49 years	9%
50 years and over	4%
Location	
Hanoi	21%
Da Nang	14%
Ho Chi Minh City	22%
Can Tho	14%
Hai Phong	14%
Nha Trang	14%
Total	100%

THE DIGITAL LANDSCAPE

ADOPTION, AUDIENCE PROFILE AND CONNECTED DEVICE OWNERSHIP

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THE DIGITAL LANDSCAPE

Vietnam is a relatively untapped online market. The market is evolving and maturing rapidly, however, as new connected devices come onto the scene to expand content access further than the traditional environments of home, work and internet café.

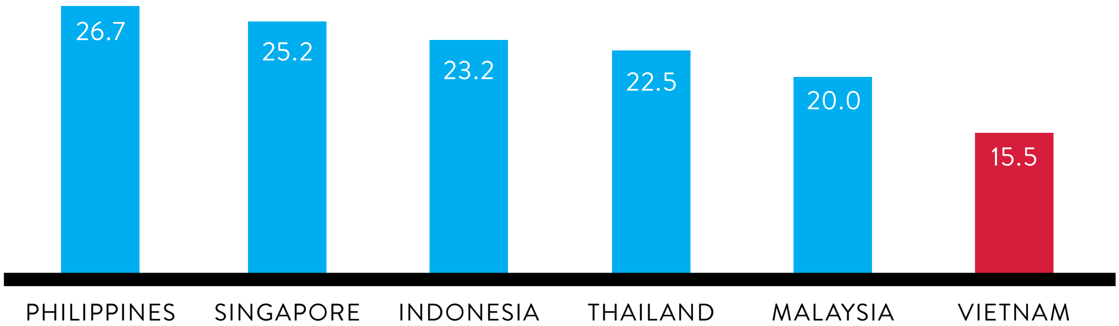
Since 2011, laptop and smartphone ownership and usage has seen steep growth, at the expense of desktop usage. Tablet ownership has surged to 35 percent, although regular online access via this device trails that of smartphones, laptops and desktops. Laptops see regular online access among close to two in three online consumers (64%), followed by smartphones (47%) and desktops (44%).

The time that Vietnamese online consumers spend accessing the internet in a given week has remained stable since 2011, at an average 16 hours per week. The rise in portable and mobile devices is driving greater internet access across a range of locations but home-based usage still dominates consumption habits.

Vietnamese households have access to more connected technology than ever before, enabling consumption of more content from a wider array of devices, and in a variety of locations both inside and outside the home environment. The ongoing shift to digital, supported by technology, represents a strong and growing opportunity for brands to reach and engage with consumers, and for publishers to monetise their content across platforms.

ONLINE CONSUMERS ACROSS SOUTHEAST ASIA DEDICATE A LOT OF TIME TO ONLINE MEDIA

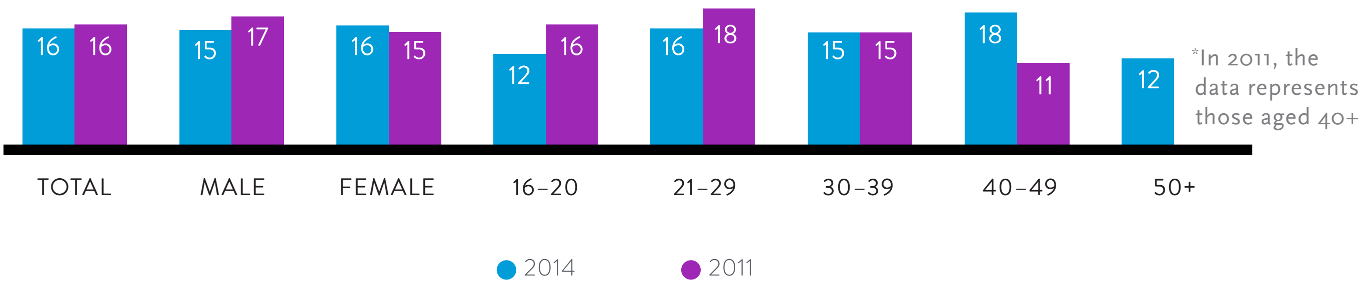
AVERAGE TOTAL TIME SPENT ONLINE EACH WEEK FOR PERSONAL PURPOSES, VIA ANY DEVICE



VIETNAMESE CONSUMERS SPEND, ON AVERAGE, LESS TIME ONLINE THAN THEIR SOUTHEAST ASIAN NEIGHBOURS

TIME SPENT ONLINE IN 2014 IS ON PAR WITH 2011, ALTHOUGH CHANGES ARE EVIDENT AMONG SOME AGE SEGMENTS

AVERAGE TOTAL TIME SPENT ONLINE EACH WEEK FOR PERSONAL PURPOSES, VIA ANY DEVICE – 2014 VS. 2011



SIGNIFICANT INCREASE AMONG OLDER ONLINE CONSUMERS WHILE YOUNG CONSUMERS ARE SPENDING LESS TIME ONLINE – PERHAPS AS SMARTPHONE USAGE DRIVES CONTENT 'SNACKING'

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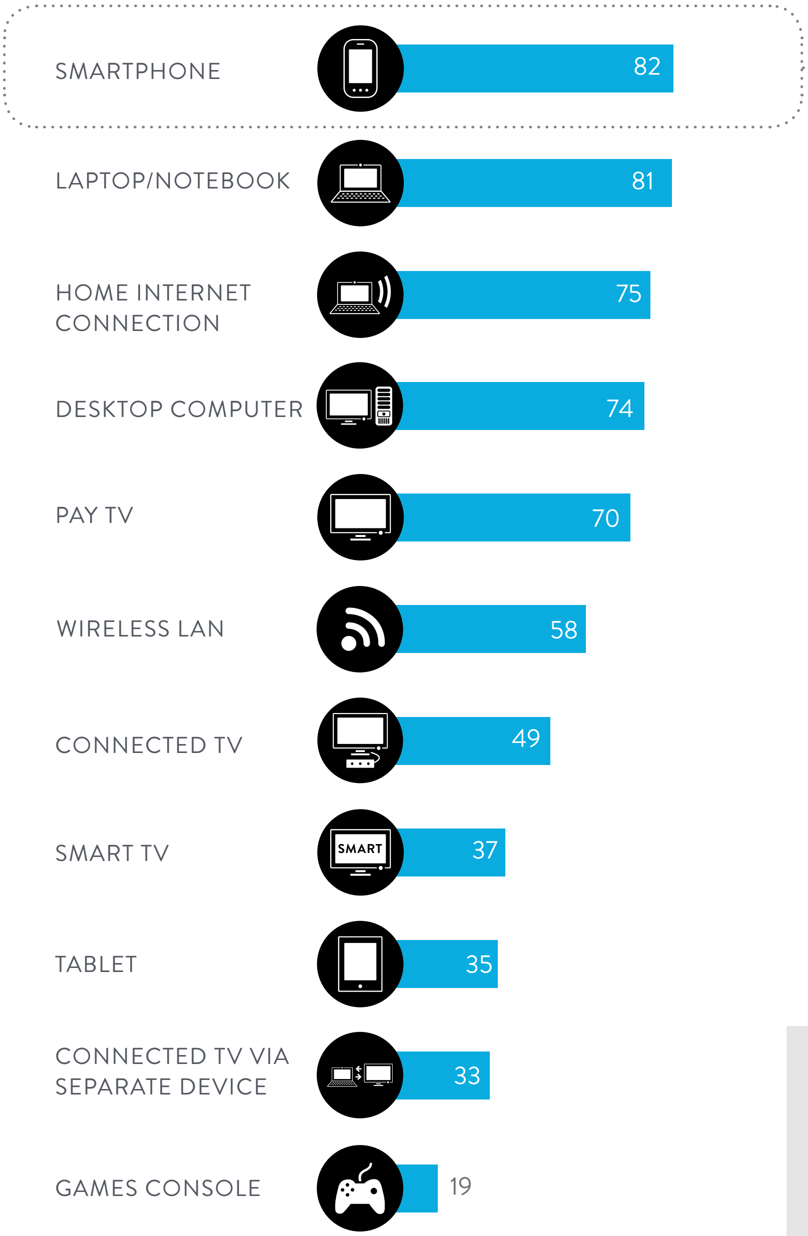
CONSUMERS HAVE ACCESS TO A LARGE AND GROWING RANGE OF CONNECTED DEVICES AND SCREENS

OWNED TECHNOLOGY AMONG ONLINE VIETNAMESE
(SMARTPHONE IS PERSONAL OWNERSHIP, ALL OTHER DEVICES ARE HOUSEHOLD OWNERSHIP)



Smartphone now the most owned device

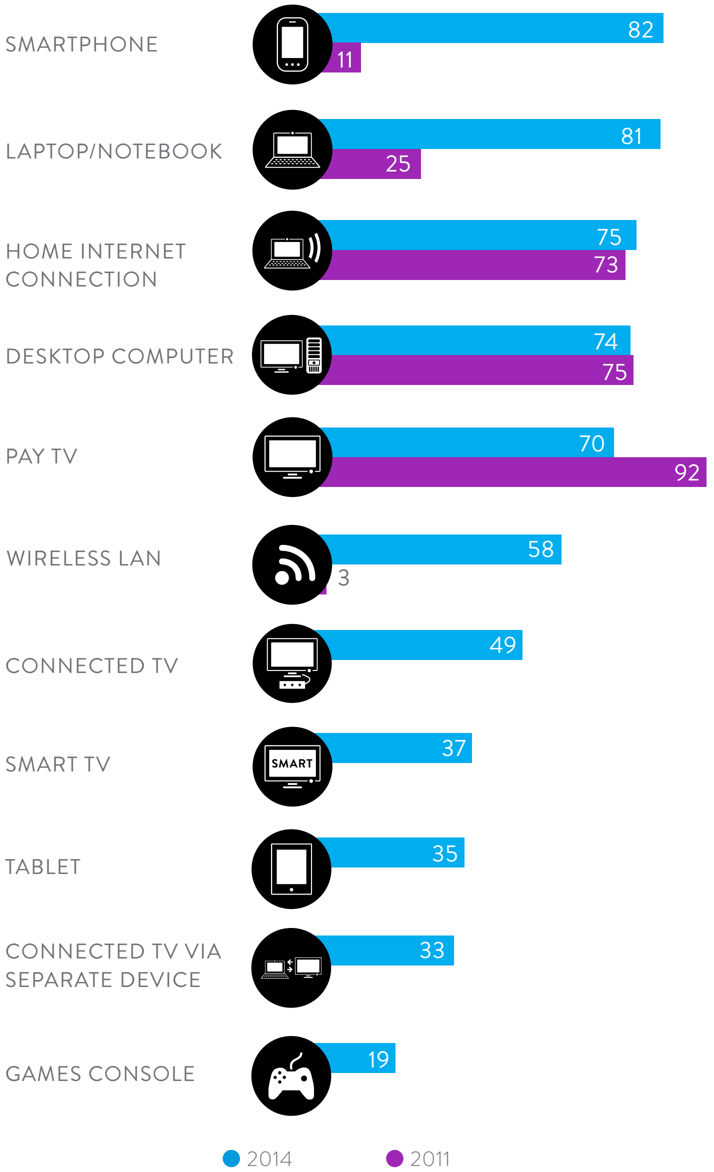
MORE CONNECTED SCREENS AND DEVICES = MORE OPPORTUNITY TO REACH AND ENGAGE CONSUMERS IN UNIQUE WAYS

*'Connected TV' combines Smart TV and TV which connects to the Internet via a separate device

Click for demographic differences

STEEP GROWTH IN ADOPTION OF DEVICES SUPPORTING MOBILITY; WHILE DESKTOP OWNERSHIP IS FLAT

OWNED TECHNOLOGY AMONG ONLINE VIETNAMESE
(SMARTPHONE IS PERSONAL OWNERSHIP, ALL OTHER DEVICES ARE HOUSEHOLD OWNERSHIP)



*'Connected TV' combines Smart TV and TV which connects to the Internet via a separate device

ACCESS TO PAY TV/CABLE TV HAS DECLINED AMONG THE ONLINE POPULATION IN VIETNAM

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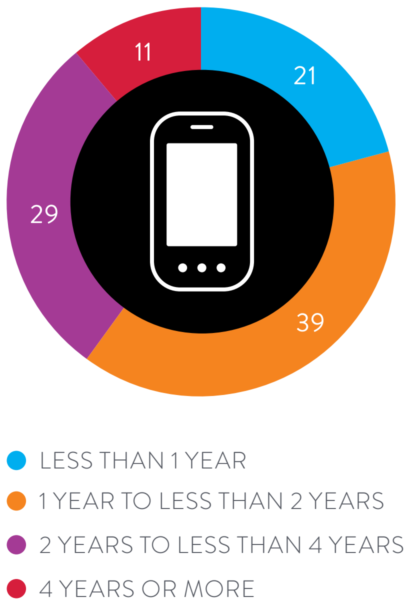
MANY SMARTPHONE USERS IN VIETNAM ARE RELATIVELY NEW TO THE TECHNOLOGY

SMARTPHONE TENURE

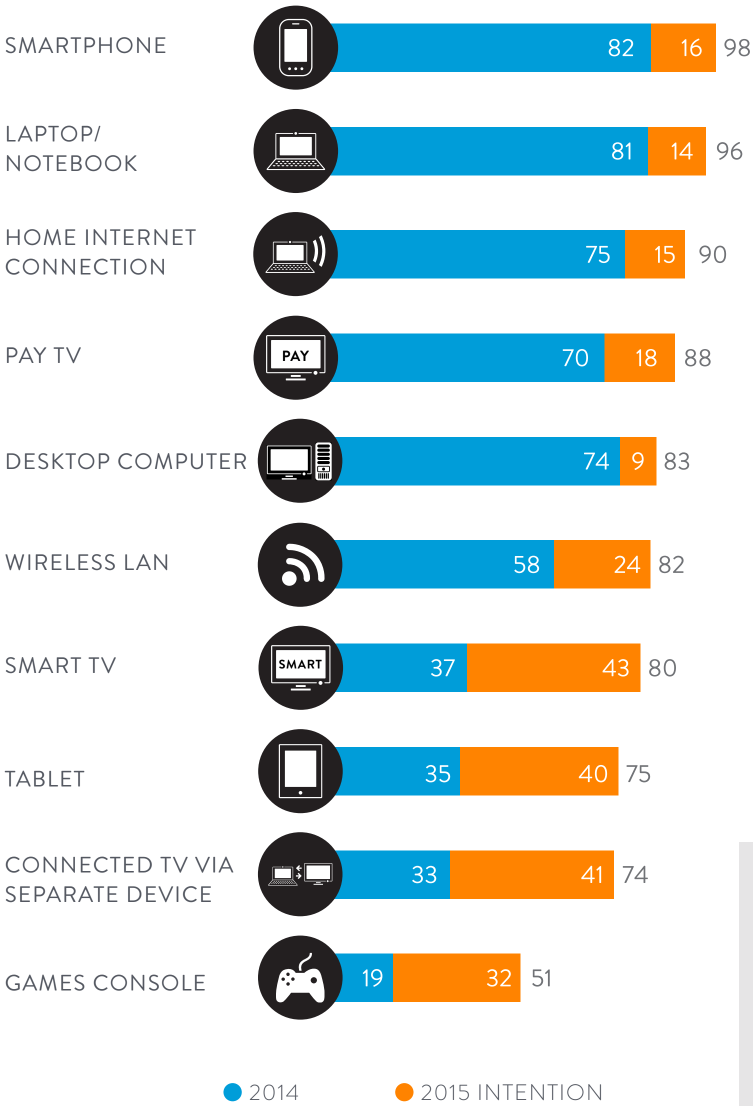


Click for demographic differences

USERS ARE SLOWLY BUILDING CONFIDENCE WITH SMARTPHONES

VIETNAMESE CONSUMERS ARE INVESTING IN NEW TECHNOLOGY

TECHNOLOGY OWNED AND INTENTION TO PURCHASE IN NEXT 12 MONTHS



CONNECTED SCREEN OWNERSHIP IN-HOME IS STRONG AND GROWING, WITH FURTHER GROWTH ANTICIPATED ACROSS ALL TECHNOLOGIES

Click for demographic differences

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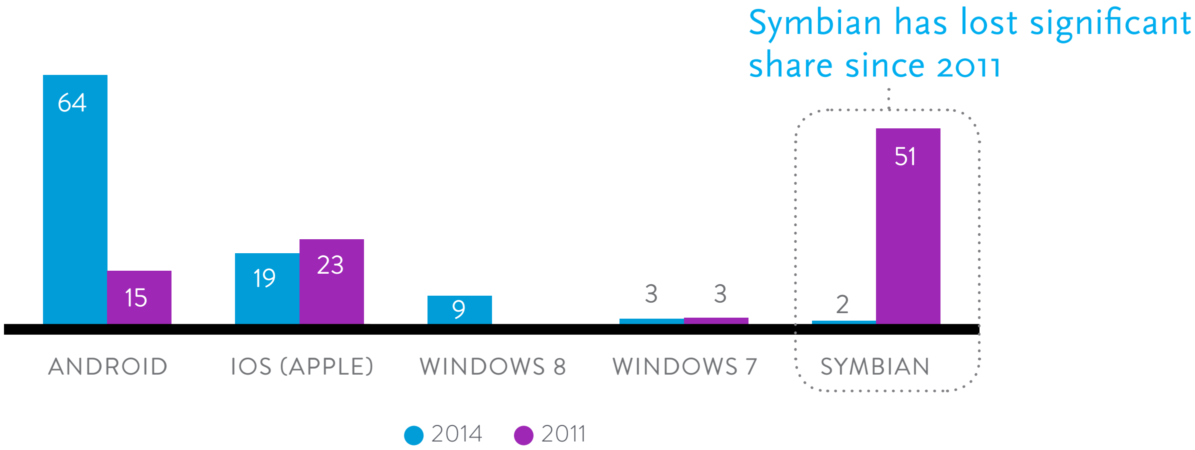
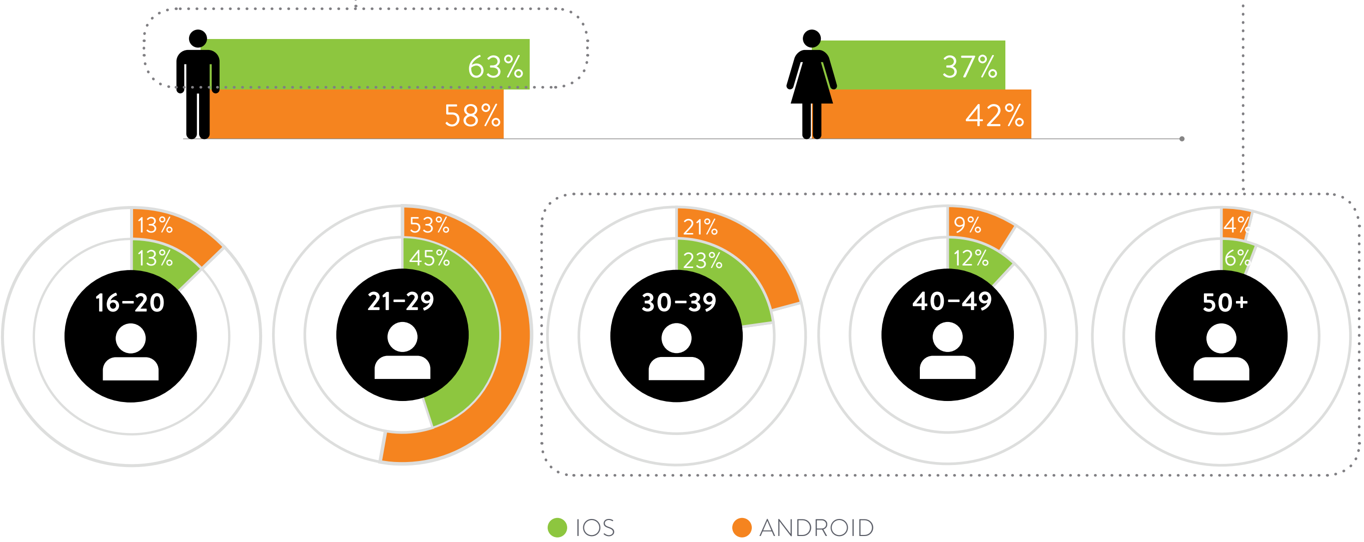
ANDROID THE OPERATING SYSTEM OF CHOICE FOR VIETNAMESE SMARTPHONE OWNERS

OPERATING SYSTEM ON MAIN SMARTPHONE 2014 VS. 2011
(AMONG SMARTPHONE USERS)



IOS VS. ANDROID USER PROFILE 2014

iOS has a stronger skew toward males and older consumers in comparison with market leader Android

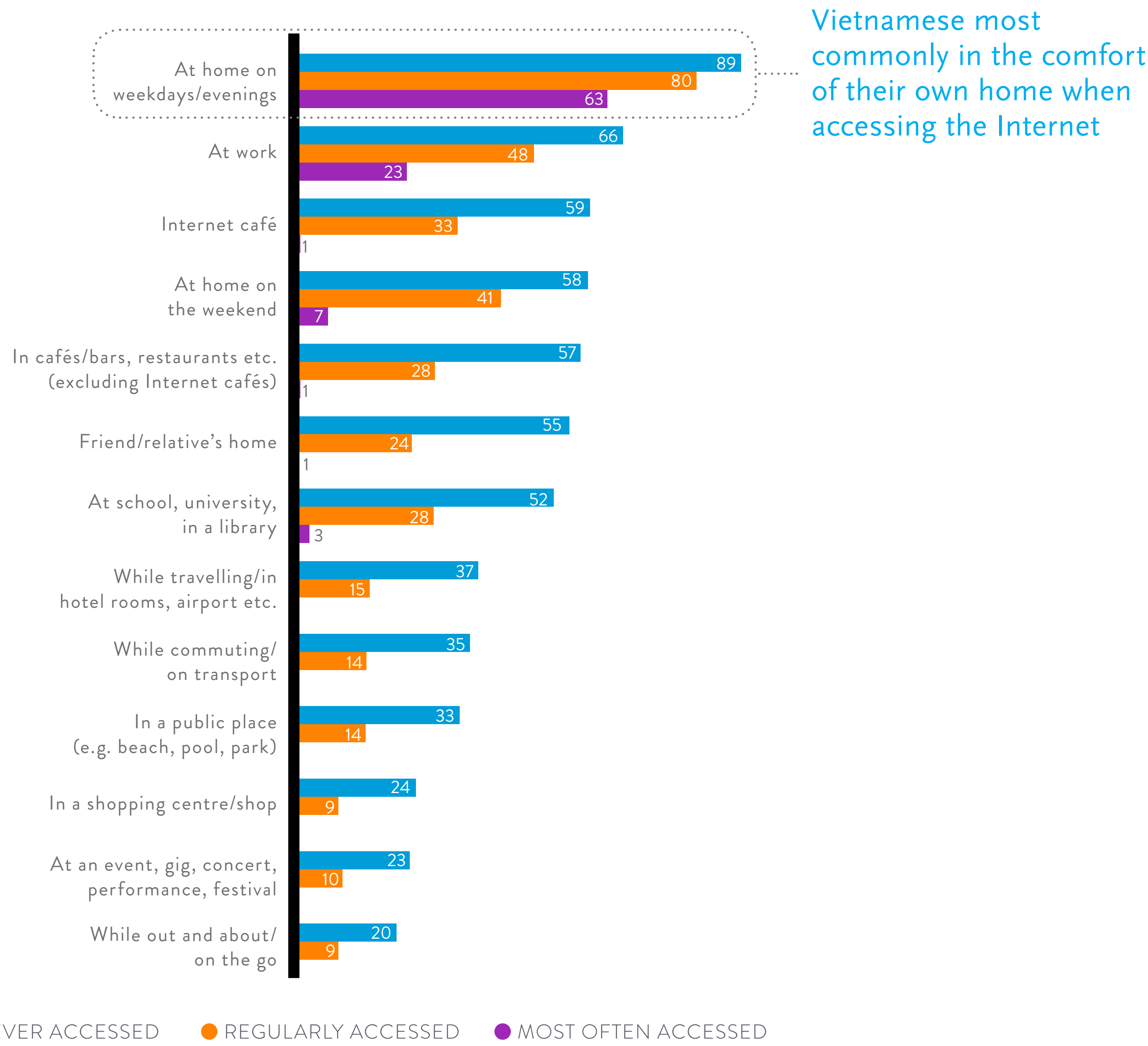


Click for demographic differences

STRATEGY AND EXECUTION NEED TO TAKE BOTH OPERATING SYSTEMS INTO ACCOUNT TO ENSURE A POSITIVE USER EXPERIENCE ACROSS THE ENTIRE MARKET

HOME, WORK AND INTERNET CAFÉS REMAIN DOMINANT LOCATIONS FOR ONLINE CONSUMPTION

LOCATIONS OF INTERNET ACCESS



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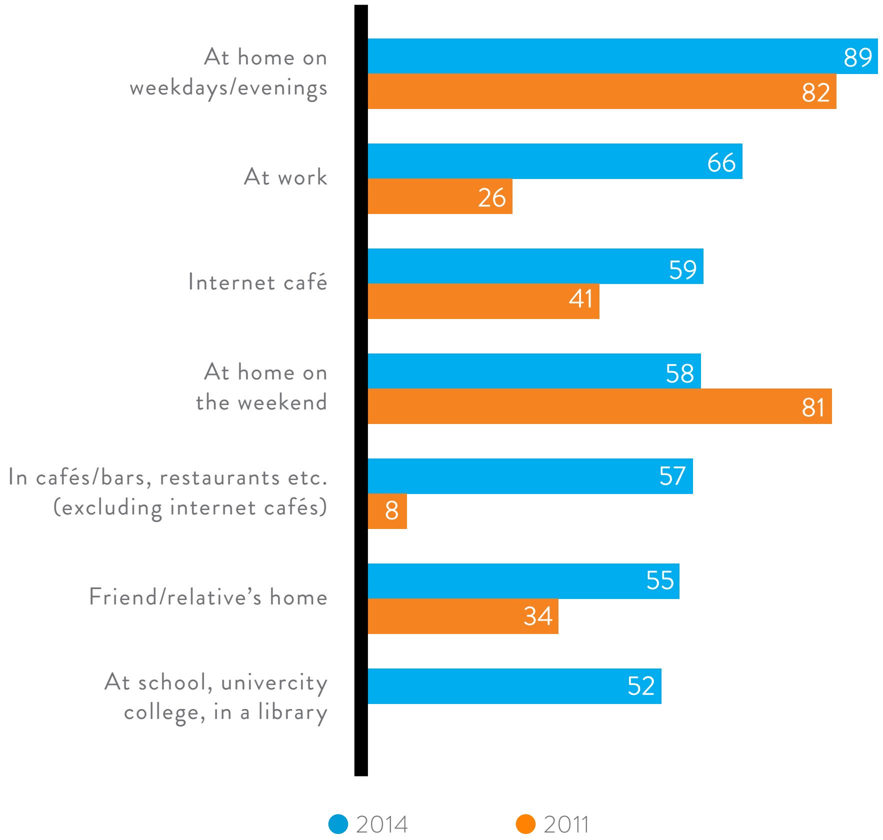
ACCESS LOCATIONS HAVE INCREASED IN THE PAST THREE YEARS

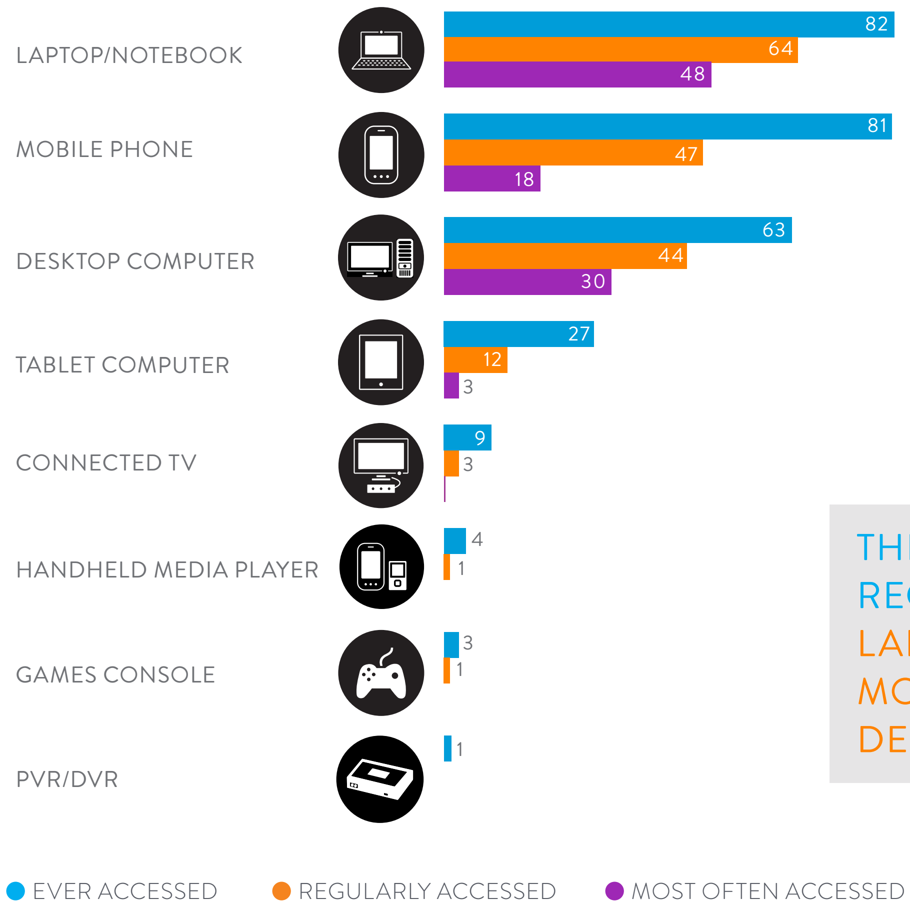
LOCATIONS INTERNET HAS EVER BEEN ACCESSED – 2014 VS. 2011



Click for demographic differences

VIETNAMESE ONLINE CONSUMERS LOVE THEIR PORTABLE DEVICES

DEVICES USED FOR INTERNET ACCESS



THREE KEY DEVICES IN THE REGULAR REPERTOIRE:
LAPTOP
MOBILE PHONE
DESKTOP

Click for demographic differences

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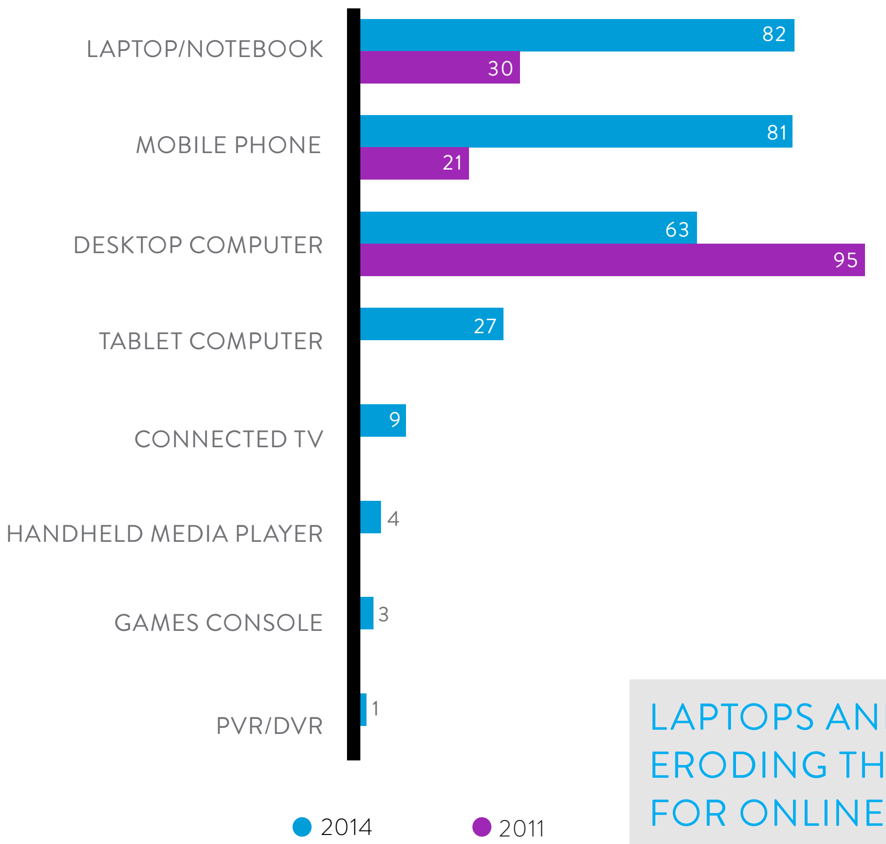
LAPTOPS AND SMARTPHONES SEE 3X GROWTH SINCE 2011

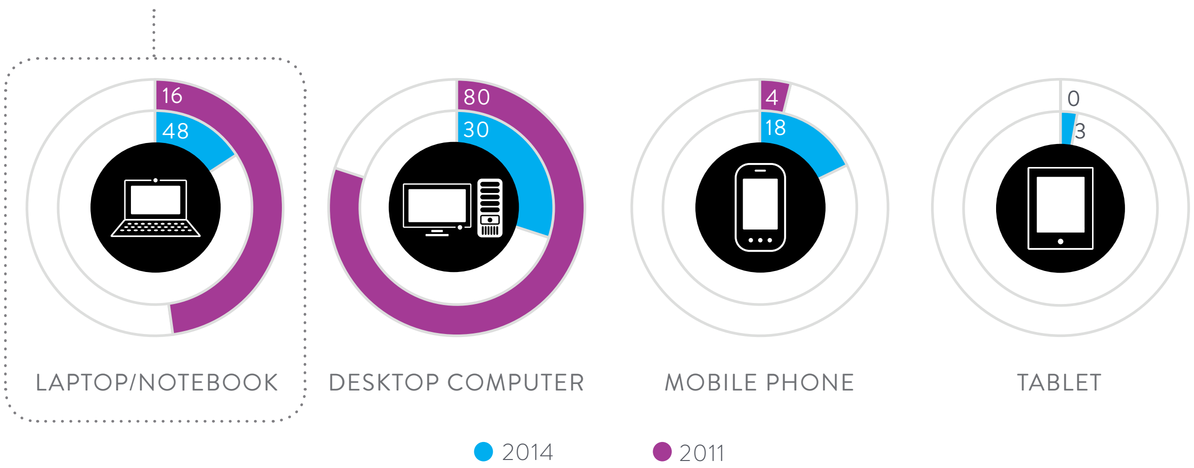
DEVICES EVER USED FOR INTERNET ACCESS – 2014 VS. 2011



LAPTOPS AND SMARTPHONES ARE ERODING THE SHARE OF DESKTOPS FOR ONLINE USAGE

DEVICE MOST USED FOR INTERNET ACCESS – 2014 VS. 2011

More than tripled as most used device for online access



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CROSS-MEDIA CONSUMPTION PATTERNS

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CROSS-MEDIA CONSUMPTION PATTERNS

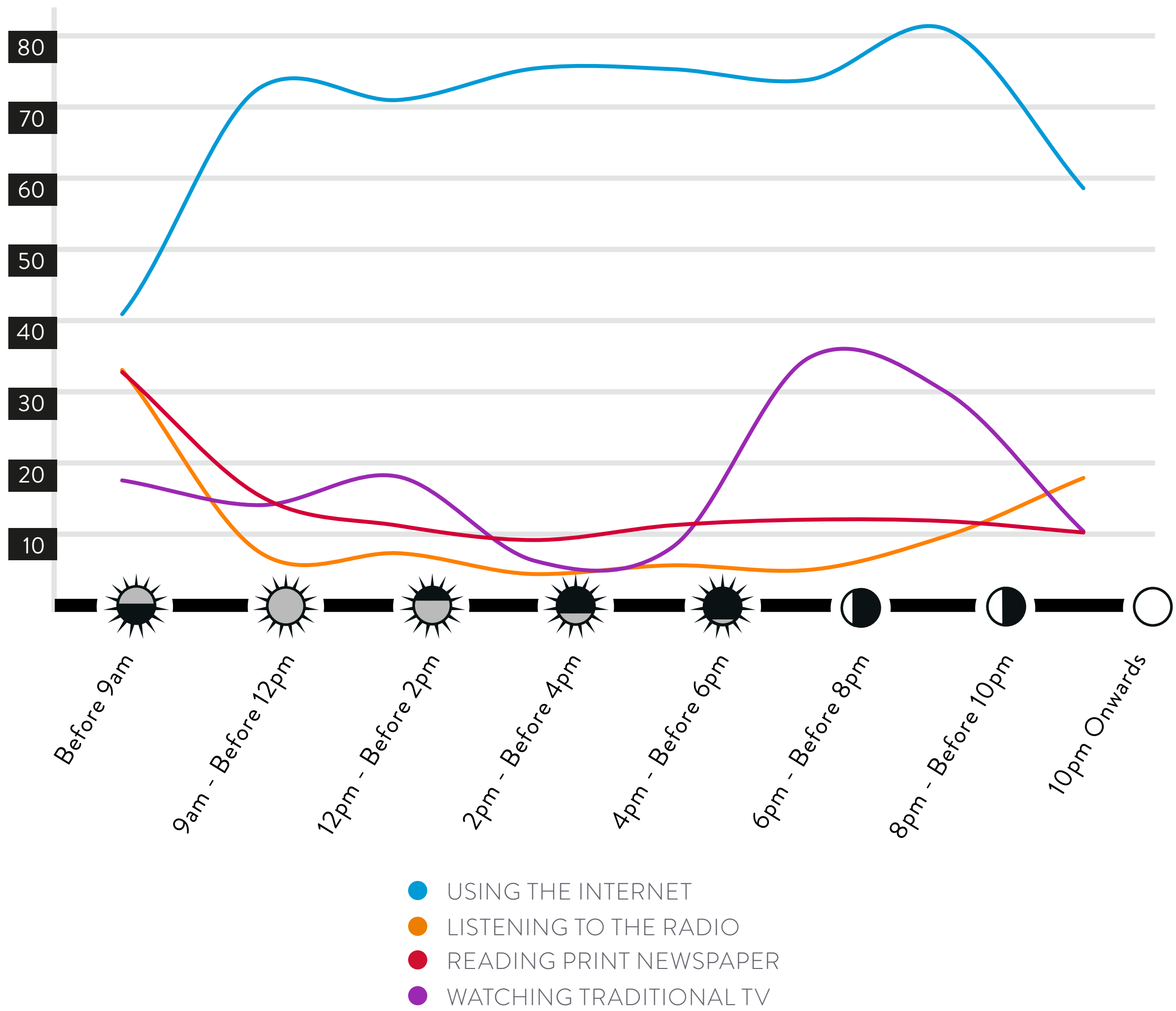
The rise of digital media continues to disrupt the media landscape and drive an evolution in consumer behaviour and preference. Digital consumers in Vietnam have quickly adapted to the new media available to them and the new devices and platforms facilitating content access.

Digitally engaged consumers in Vietnam are online and more connected across the day than ever before, taking share from former dominant media print, radio and TV.

The 'portability' of media, in the form of portable and mobile connected devices, is driving media multi-tasking behaviour as consumers snack on content with regularity and access a variety of content and sources within the same timeframe. This behaviour is most notable during evening prime time.

ONLINE MEDIA HAS SUBSTANTIAL REACH ACROSS THE DAY; FACILITAED BY MANY CONNECTED AND 'ALWAYS ON' DEVICES LIKE SMARTPHONES

ONLINE ACTIVITIES ACROSS DAY-PARTS
(AS A PROPORTION OF TOTAL ONLINE POPULATION)



Click for demographic differences

DIGITAL MEDIA IS A VITAL COMPONENT TO AN ORGANISATIONS' CROSS-PLATFORM STRATEGY

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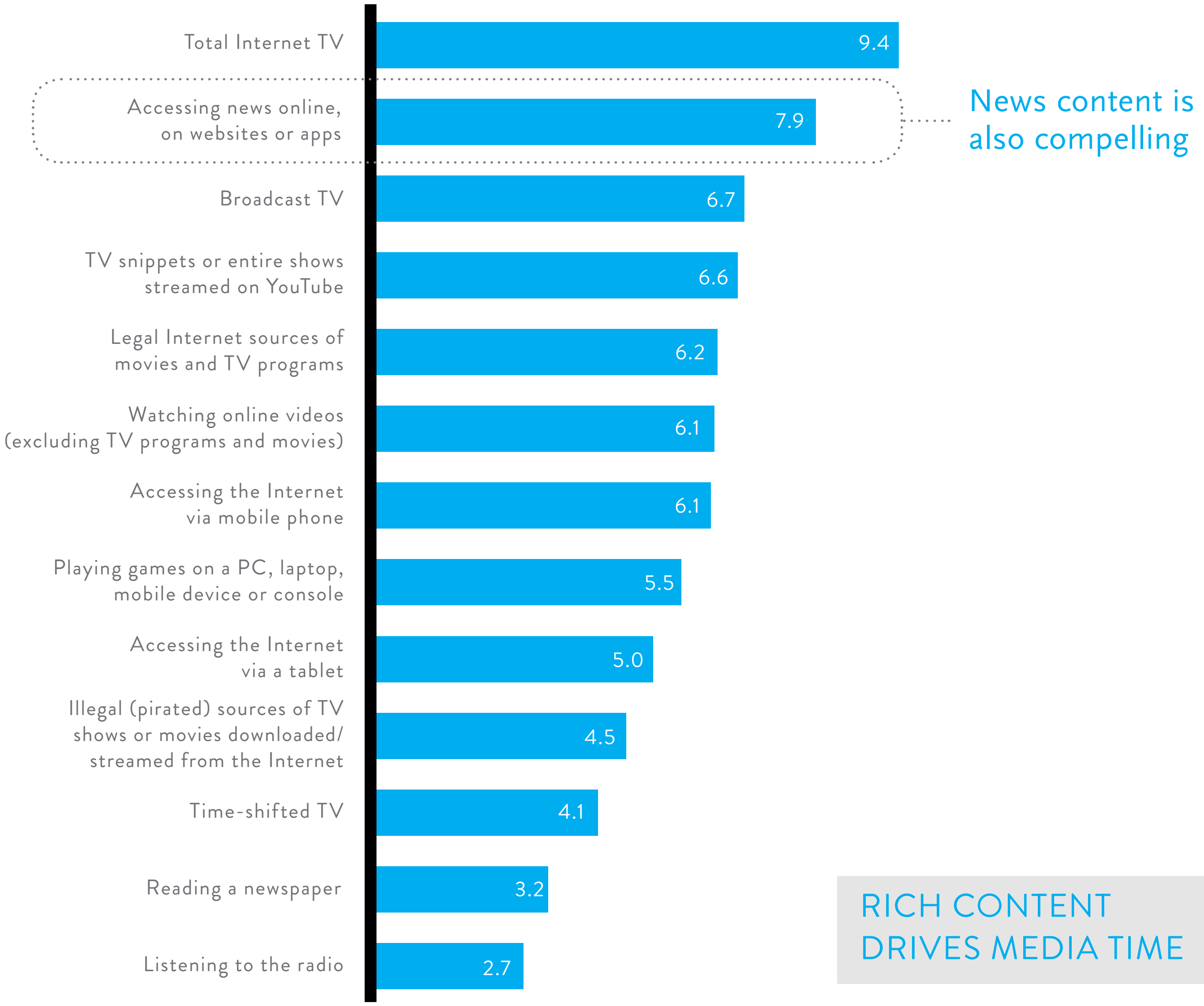
VIETNAMESE AUDIENCES LOVE VIDEO, REGARDLESS OF THE SOURCE

TOTAL AVERAGE HOURS PER WEEK (FOR PERSONAL PURPOSES) – AMONG ACTIVITY USER BASE

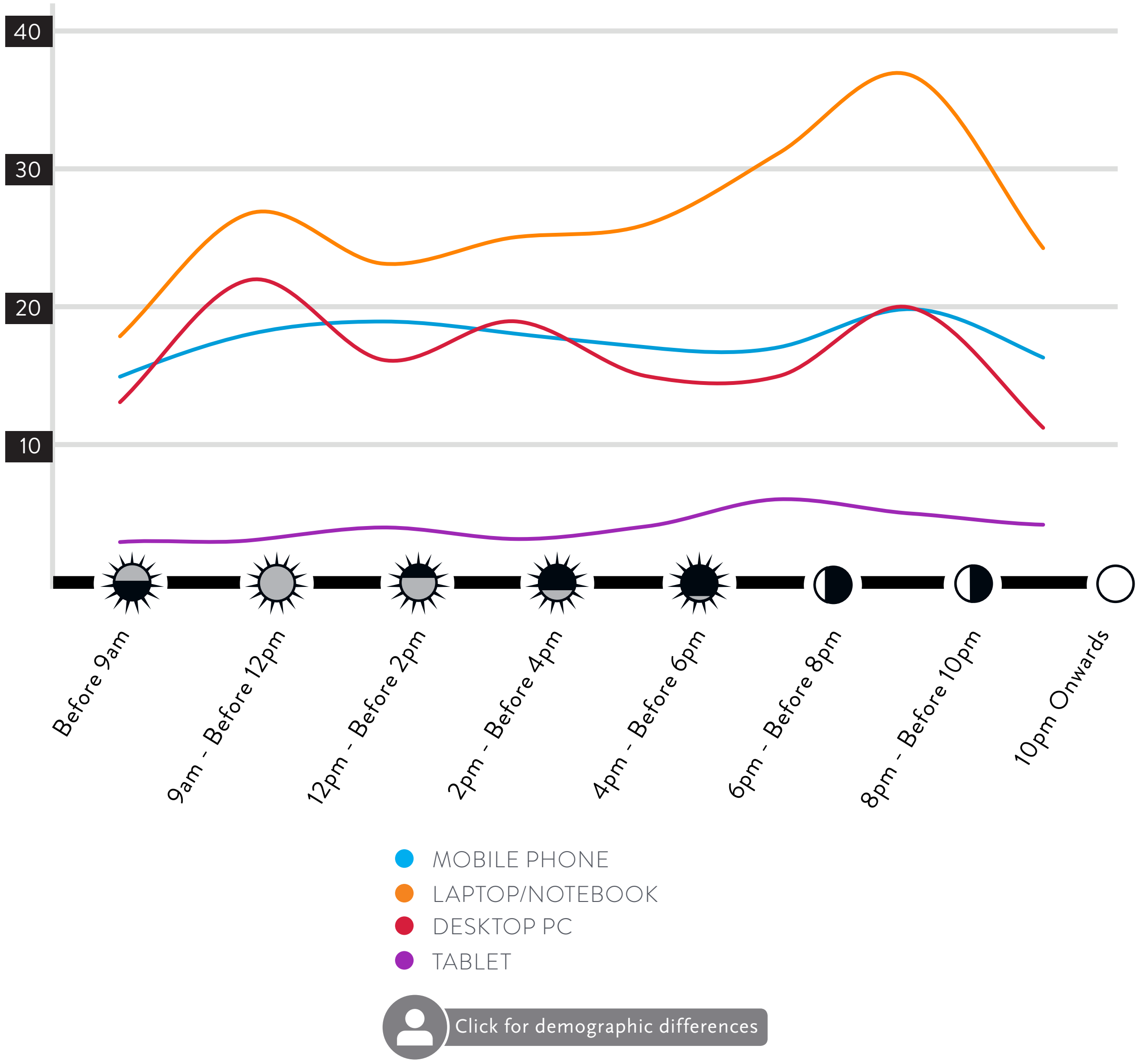


RICH CONTENT DRIVES MEDIA TIME

Click for demographic differences

MOBILE PHONES, LAPTOPS AND DESKTOPS ARE KEY DEVICES FOR REACHING LOCAL CONSUMERS ACROSS THE DAY

ONLINE ACCESS BY DEVICE ACROSS DAY-PARTS
(AS A PROPORTION OF TOTAL ONLINE POPULATION)



MORE CONNECTED DEVICES PROVIDES MORE MARKETING AND ENGAGEMENT OPPORTUNITIES USING DIGITAL MEDIA

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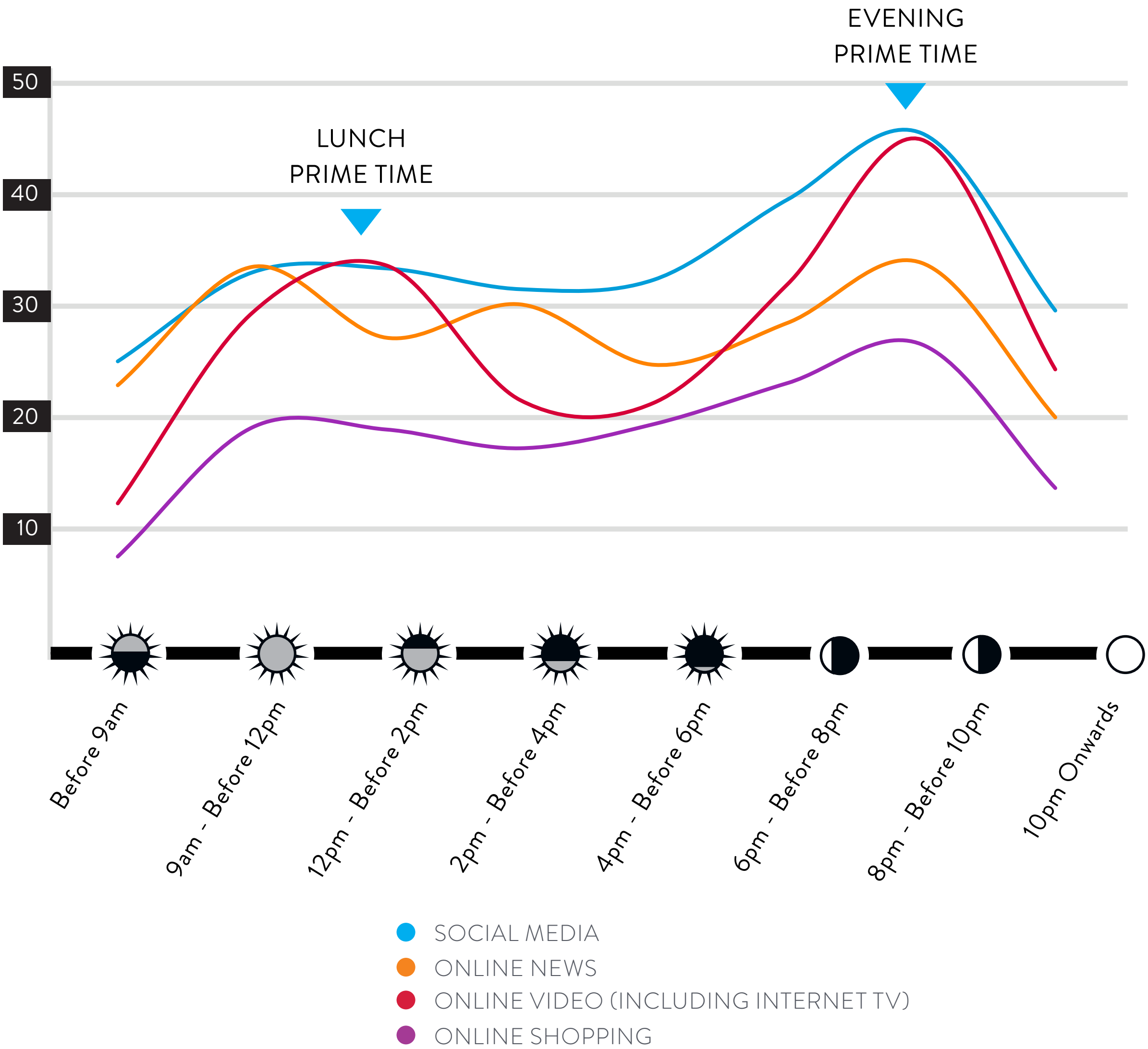
MEDIA MULTI-TASKING IS ON THE RISE

ONLINE ACTIVITIES ACROSS DAY-PARTS
(AS A PROPORTION OF TOTAL ONLINE POPULATION)

Social media is strong across the day while online video has two 'prime times'



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VIETNAMESE CONSUMERS SEEK OUT NEWS ONLINE ACROSS THE DAY

VIDEO CONTENT CONSUMPTION

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VIDEO CONTENT CONSUMPTION

The shift toward online video content delivery is gaining momentum. Two in three online Vietnamese watch internet TV, edging closer to the 79 percent who watch traditional forms of video content – namely broadcast TV. This represents a strong opportunity for brands to reach their consumers with rich content across a variety of platforms – traditional and digital.

The proportion of consumers accessing official (legal) sources of internet TV is significantly greater than that accessing pirated content and YouTube is shaping up to become a popular source of 'TV'.

Overall, the consumption of video content online is on the rise, driven by increases in streaming video content on a regular basis. Online is driving video consumption during the day, while both traditional and digital platforms are driving evening prime time consumption.

There has been massive growth in video consumption via mobile devices over the past three years, off a very low base. Based on intended future up-take of smartphones and tablets, this growth is expected to continue.

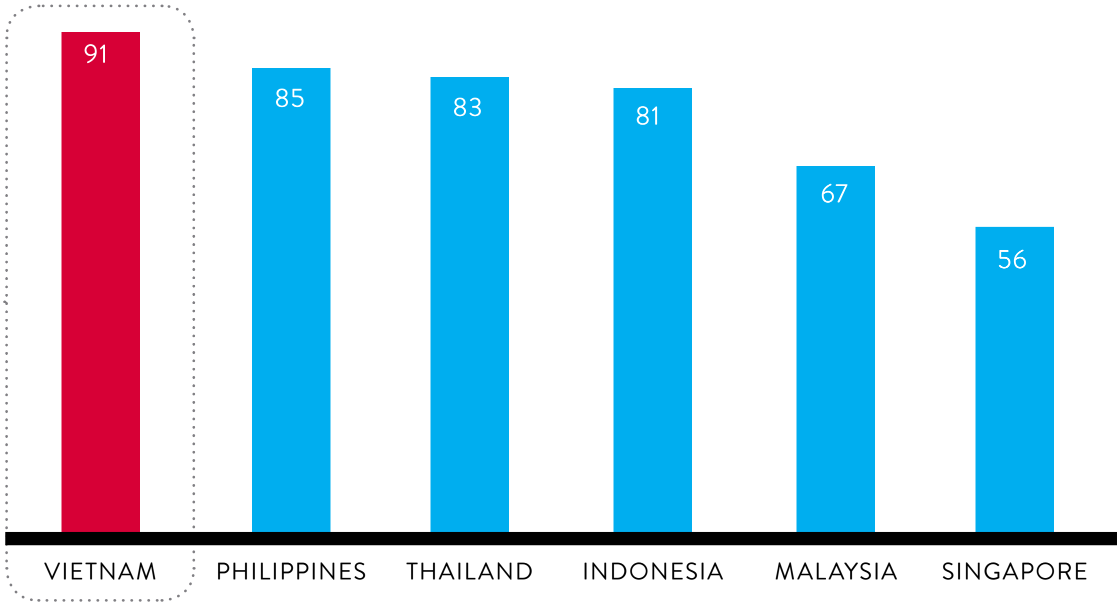
Online delivery of video content adds yet another dimension to Vietnamese online consumers' TV viewing habits when planning and strategising opportunities for brand reach and message resonance via video content.

ONLINE VIDEO CONSUMPTION

DIGITAL CONSUMERS HEAD ONLINE FOR VIDEO CONTENT ON A REGULAR BASIS

WEEKLY ACCESS OF ONLINE VIDEO IN 2014

Prevalence of online video viewing in Southeast Asia is highest in Vietnam



VIETNAMESE CONSUMERS ARE TAKING ADVANTAGE OF THE CONVENIENCE OF ONLINE VIDEO CONTENT

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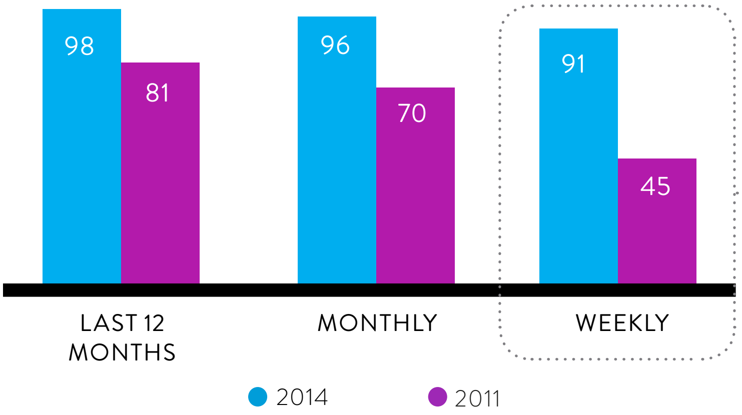
ONLINE VIDEO CONSUMPTION IS VERY STRONG

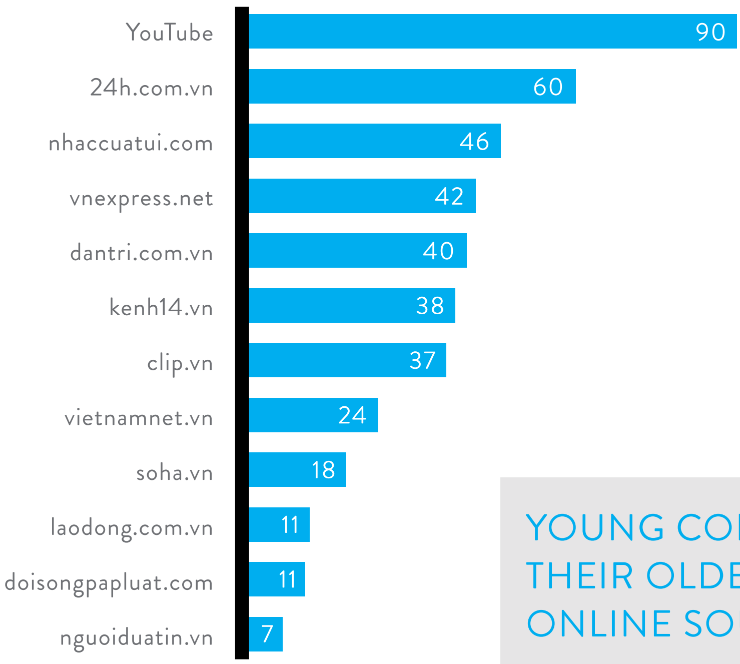
GENERAL ONLINE VIDEO BEHAVIOUR – STREAMING AND/OR DOWNLOADING (ANY ONLINE VIDEO, NOT SPECIFICALLY TV AND MOVIE CONTENT)



Weekly activity is highest among young consumers

Click for demographic differences

POPULAR SOURCES OF ONLINE VIDEO AMONG THOSE WHO DOWNLOADED/STREAMED IN PAST 12 MONTHS



YOUNG CONSUMERS MORE LIKELY THAN THEIR OLDER COUNTERPARTS TO TURN TO ONLINE SOURCES FOR VIDEO CONTENT

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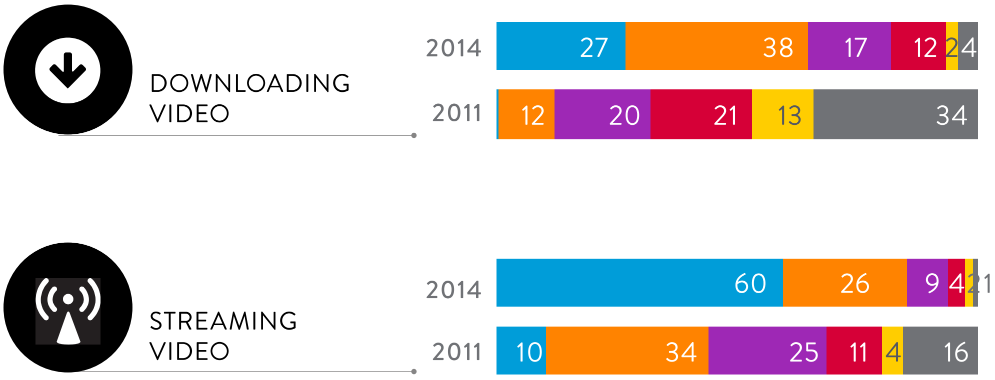
VIDEO IS NOW STREAMED FAR MORE OFTEN THAN DOWNLOADED

FREQUENCY OF DOWNLOADING VS. STREAMING VIDEO –
2014 VS. 2011



DAILY/MULTIPLE TIMES DAILY

WEEKLY OR A FEW TIMES EACH WEEK

ABOUT FORTNIGHTLY OR MONTHLY

LESS OFTEN THAN MONTHLY, BUT I'HV DONE THIS IN THE PAST 12 MONTH

I'VE DONE THIS BUT NOT IN THE PAST 12 MONTHS

I HAVE NEVER DONE THIS

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HABITS HAVE SHIFTED TOWARD VIDEO STREAMING RATHER THAN DOWNLOADING – LIKELY DUE TO IMPROVED CONNECTION SPEED AND USE OF MOBILE DEVICES FOR VIDEO VIEWING

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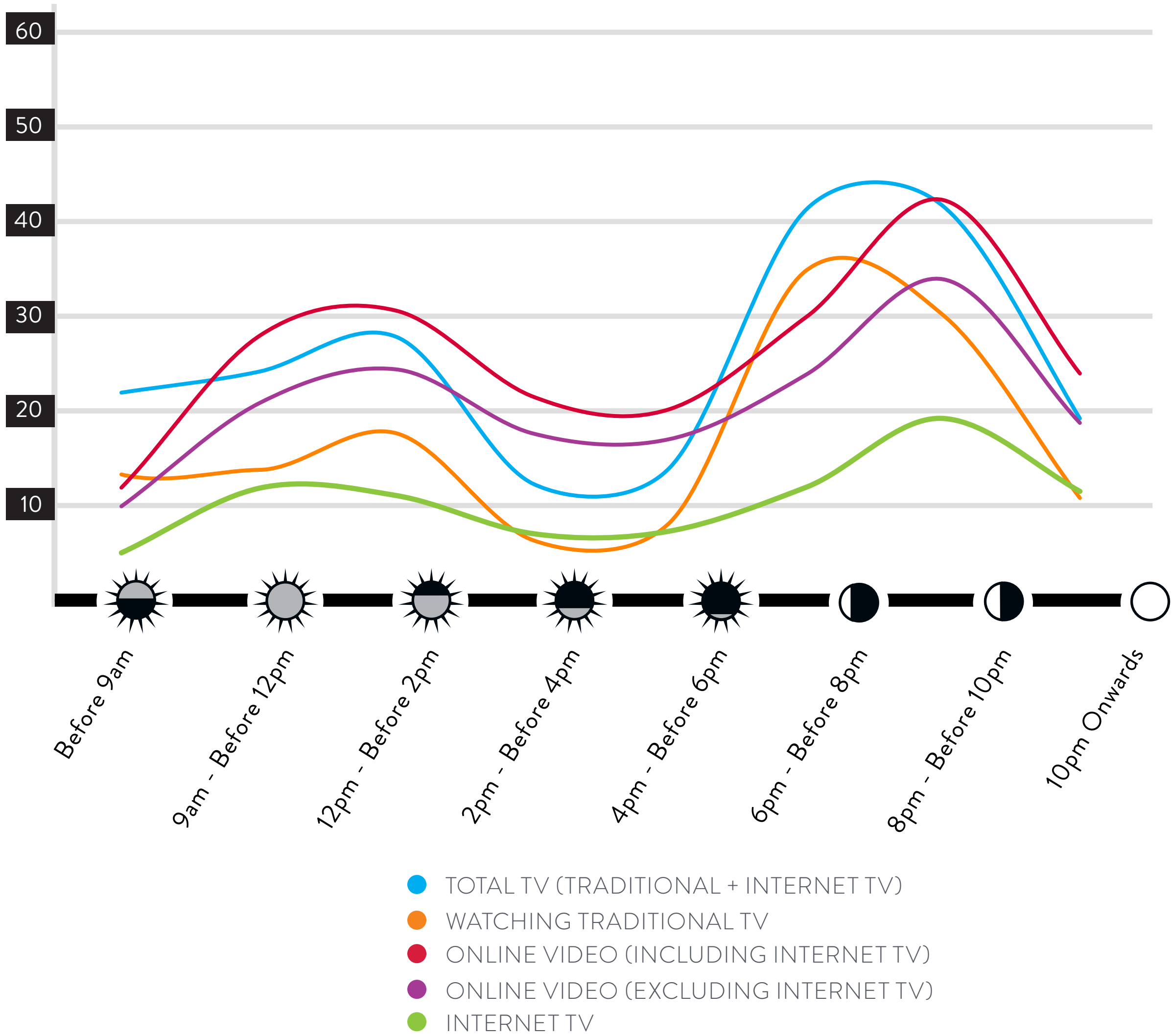
ONLINE IS DRIVING VIDEO CONTENT CONSUMPTION DURING THE DAY, WHILE TRADITIONAL AND ONLINE SOURCES CONTRIBUTE TO EVENING PRIME TIME

VIDEO CONTENT CONSUMPTION ACROSS THE DAY (WEEK DAY) – AS A PROPORTION OF THE TOTAL ONLINE POPULATION

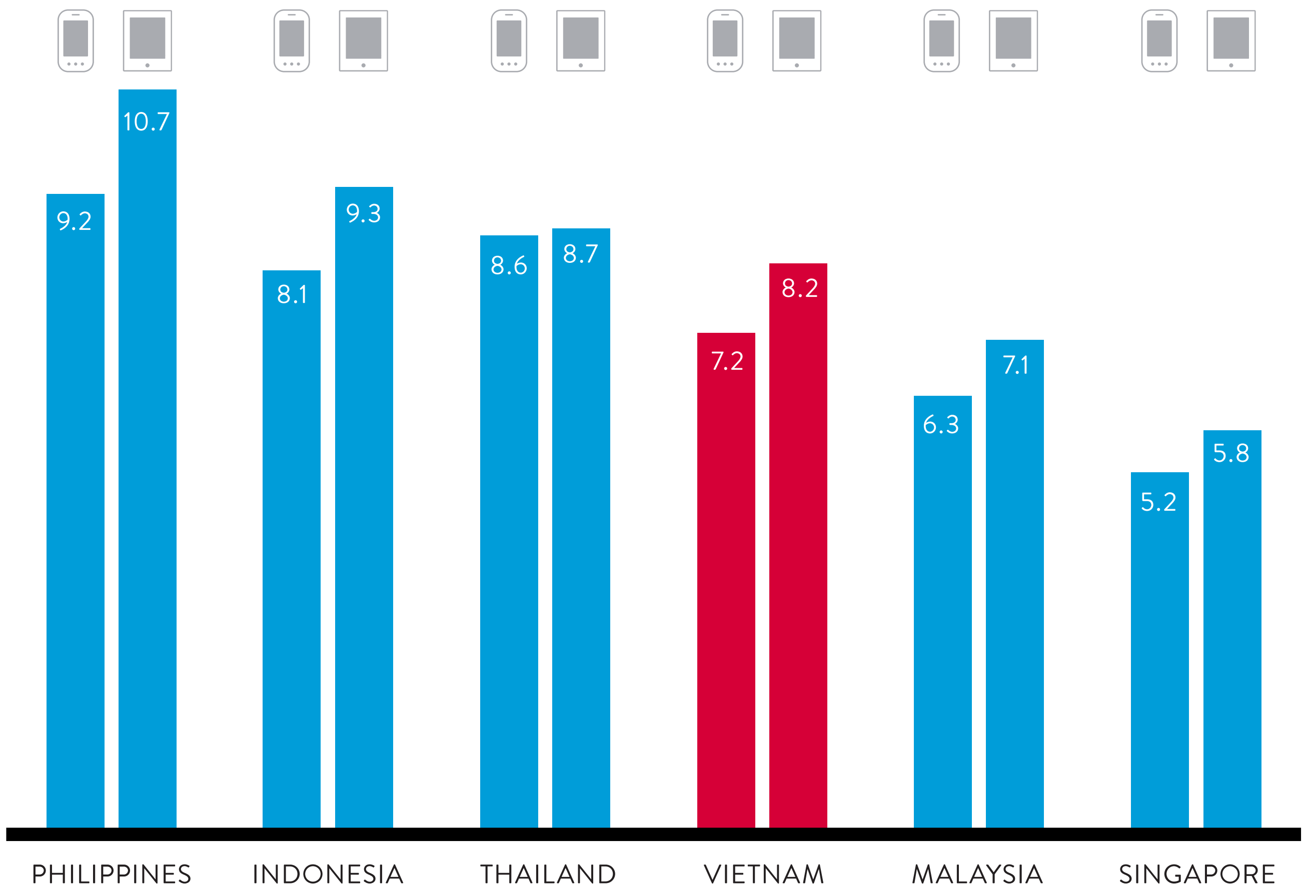


Click for demographic differences

ONLINE VIDEO IS EXTENDING THE REACH OF RICH CONTENT ACROSS THE DAY AND INTO THE LATE EVENING TIME SLOT

DIGITAL CONSUMERS ARE EMBRACING THEIR CONNECTED DEVICES FOR VIDEO VIEWING

WEEKLY TIME SPENT WATCHING VIDEO ONLINE VIA MOBILE PHONE AND TABLET (AVERAGE HOURS)



ONLINE VIETNAMESE CONSUMERS SPEND MORE TIME WATCHING VIDEO VIA A TABLET THAN ON THEIR MOBILE PHONE

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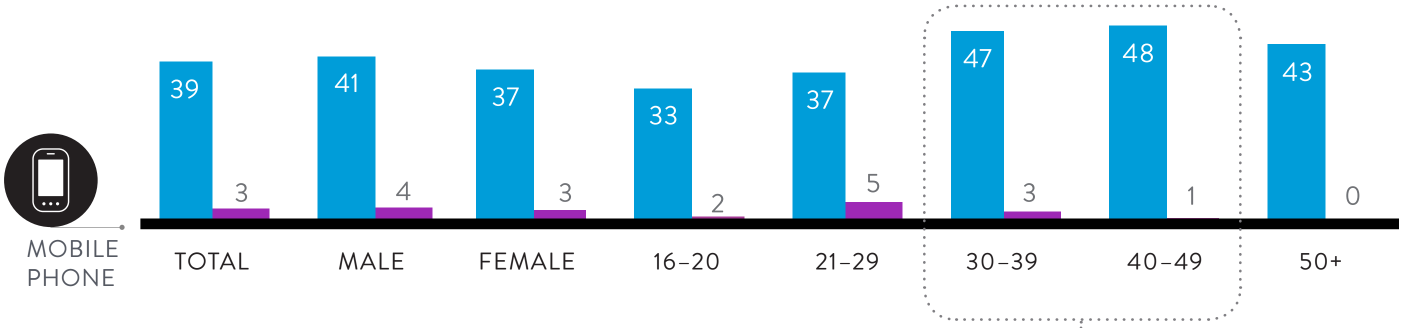
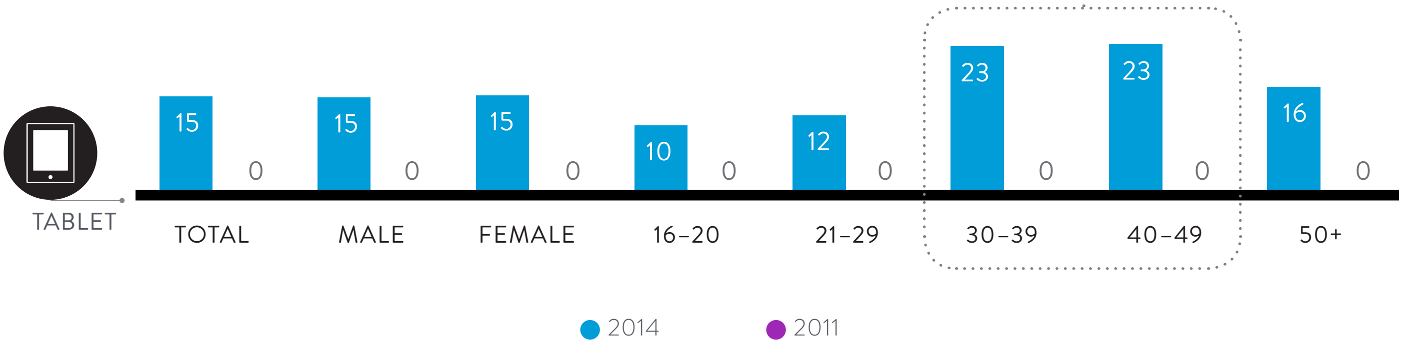
MASSIVE GROWTH IN VIDEO CONSUMPTION VIA MOBILE DEVICES OVER THE PAST THREE YEARS

ACCESSING ONLINE VIDEO VIA MOBILE PHONE – 2014 VS. 2011 (AMONG TOTAL ONLINE POPULATION)



30-49 year olds are the biggest adopters of mobile and tablet video

ACCESSING ONLINE VIDEO VIA TABLET – 2014 VS. 2011 (AMONG TOTAL ONLINE POPULATION)

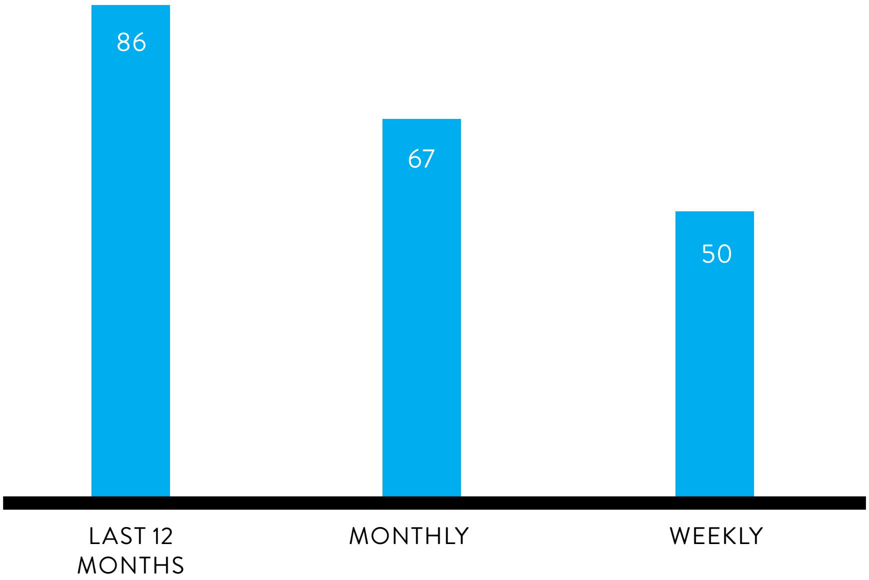


Click for demographic differences

MORE DEVICES SUPPORTING VIDEO VIEWING WILL CONTINUE TO DRIVE CONSUMPTION HABITS

THE REACH AND INFLUENCE OF VIDEO CONTENT IS EXTENDING VIA SHARING ACTIVITY

VIDEO CONTENT SHARING – POSTING/UPLOADING/
SHARING VIDEO CLIPS ONLINE



Click for demographic differences

TODAY'S SOCIAL MEDIA ENVIRONMENT PROVIDES GREAT OPPORTUNITY TO PROMOTE SHARING

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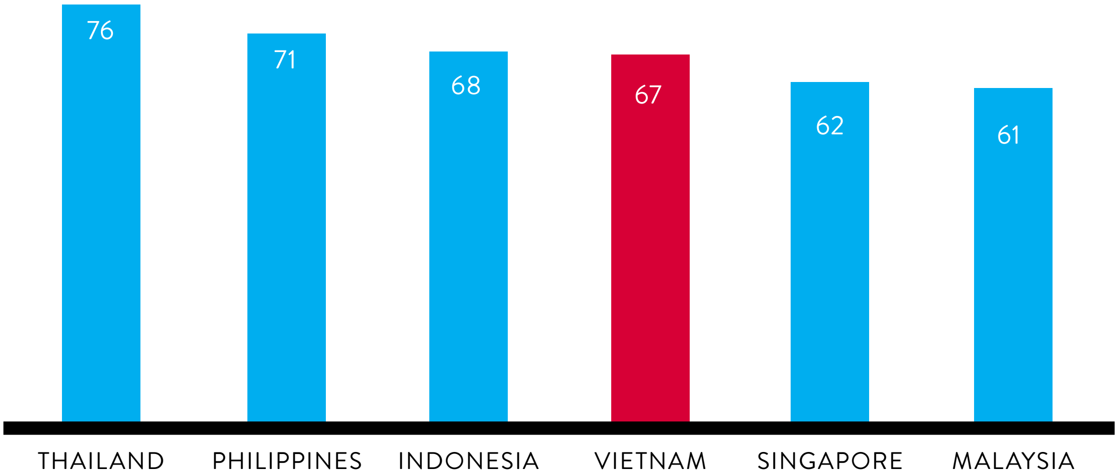
VIDEO ON DEMAND (VOD): TV AND MOVIE CONSUMPTION

ACROSS SOUTHEAST ASIA, THE TV HABITS OF DIGITAL CONSUMERS ARE SHIFTING

INTERNET TV PENETRATION IN 2014

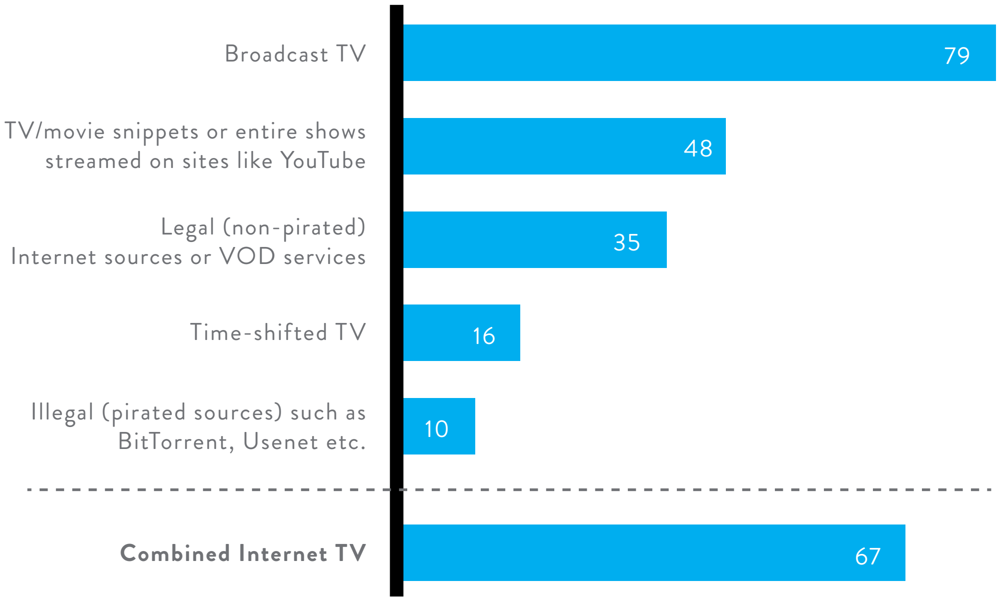
More than six in 10 Southeast Asian digital consumers obtain TV or movie content from online sources



VIDEO CONTENT ON DEMAND IS GROWING IN POPULARITY ACROSS ALL MARKETS

BROADCAST TV REMAINS STRONG BUT VOD IS GROWING

HOW TV AND MOVIE CONTENT IS ACCESSED IN 2014



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CONSUMERS NOW OBTAIN THEIR VIDEO CONTENT FROM A VARIETY OF SOURCES – TRADITIONAL AND DIGITAL

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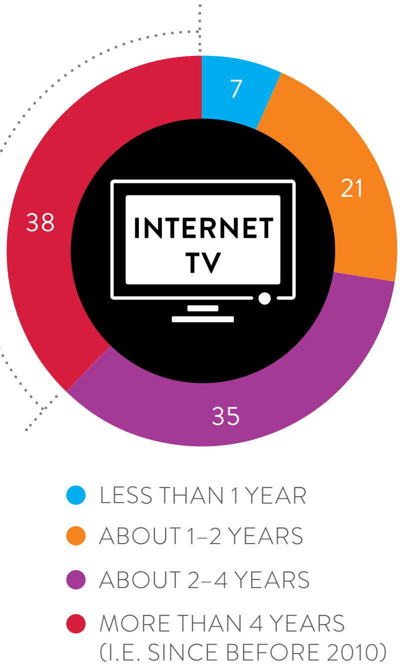
VOD IS STILL ATTRACTING NEW AUDIENCES BUT MANY ARE LONG-TERM USERS

INTERNET TV TENURE
(AMONG THOSE ACCESSING VOD SERVICES)

More than one-third has sourced TV and movies online for 4+ years

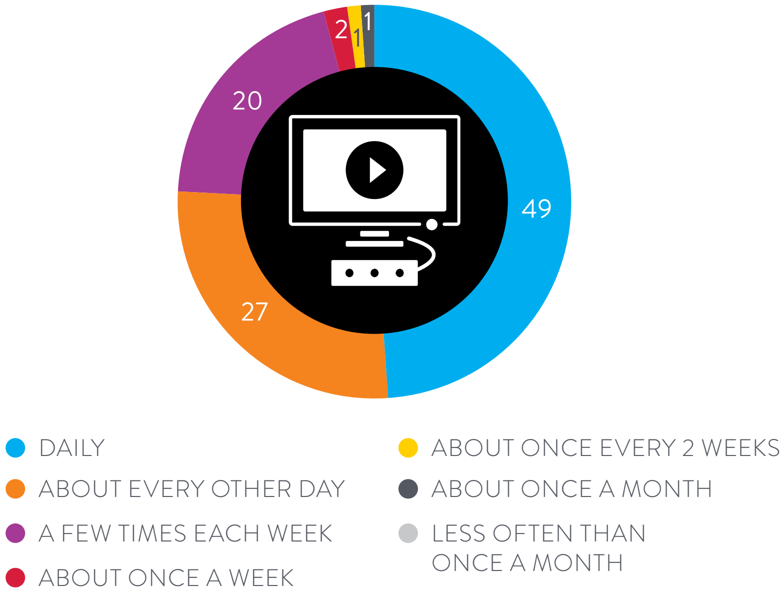


Click for demographic differences

AUDIENCE SOPHISTICATION IN SOURCING QUALITY VIDEO CONTENT ONLINE IS GROWING

REGULAR VIEWING IS COMMON: HALF TUNE IN ON A DAILY BASIS

FREQUENCY OF VIEWING VOD
(AMONG THOSE ACCESSING VOD SERVICES)



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MANY CONSUMERS ARE WATCHING VOD ON A REGULAR BASIS

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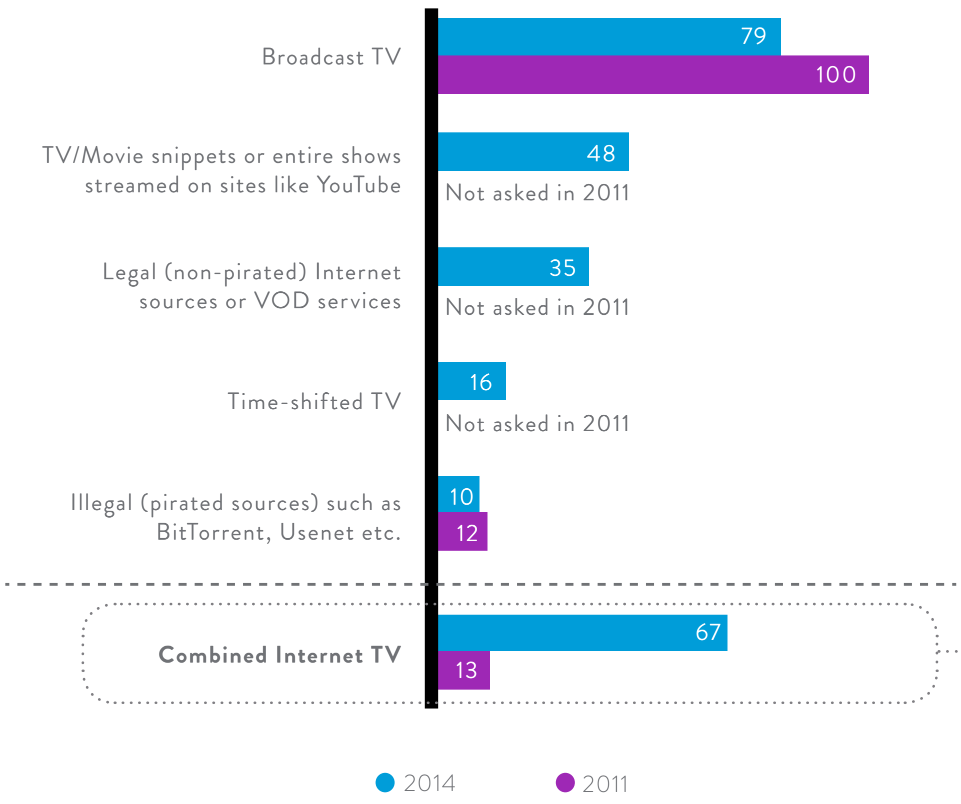
ACCESSING PIRATED CONTENT IN DECLINE AS SUPPLY OF LEGITIMATE VOD CONTENT GROWS

TYPICAL MEANS OF ACCESSING TV AND MOVIE CONTENT – 2014 VS. 2011

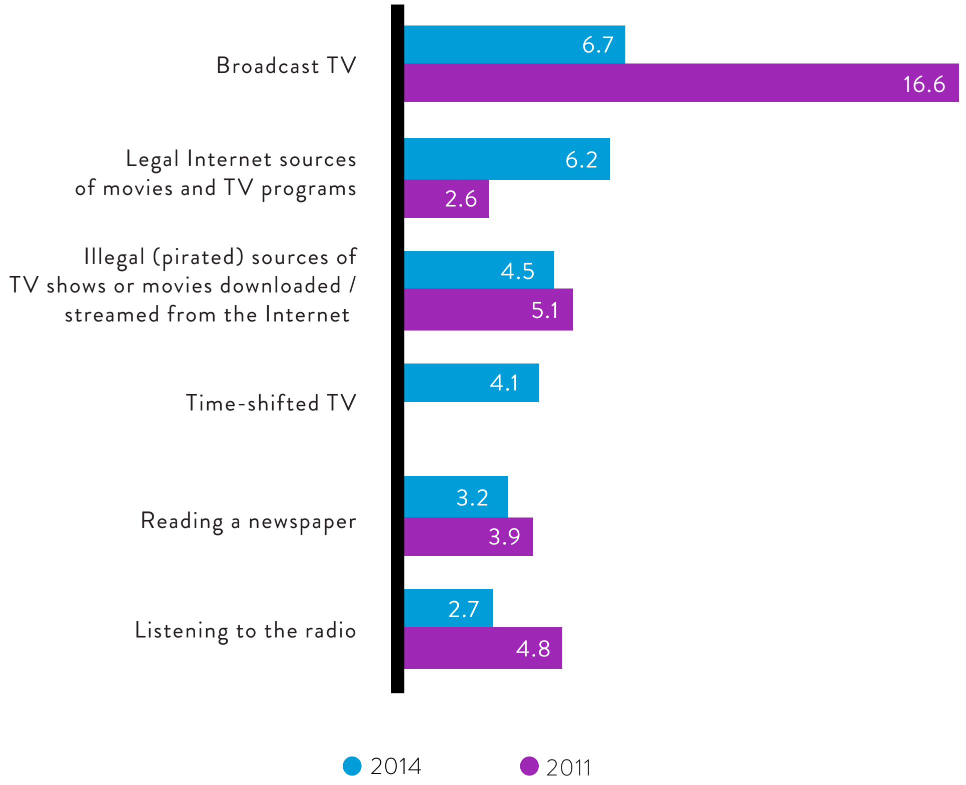


Total VOD consumption now 67 percent penetration – closing the gap on traditional sources

ILLEGAL SOURCES OF CONTENT ARE USED LESS WHEN LEGAL SOURCES ARE AVAILABLE

SHARE OF TIME HAS SHIFTED FROM BROADCAST TO ONLINE SOURCES OVER THE PAST THREE YEARS

TOTAL AVERAGE HOURS PER WEEK (FOR PERSONAL PURPOSES) – 2014 VS. 2011



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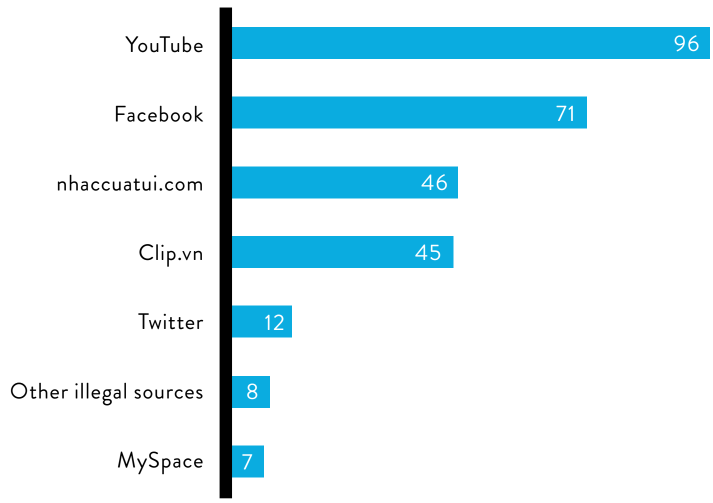
DEMAND IS HIGH FOR BOTH LOCAL AND INTERNATIONAL SERVICES AND CONTENT

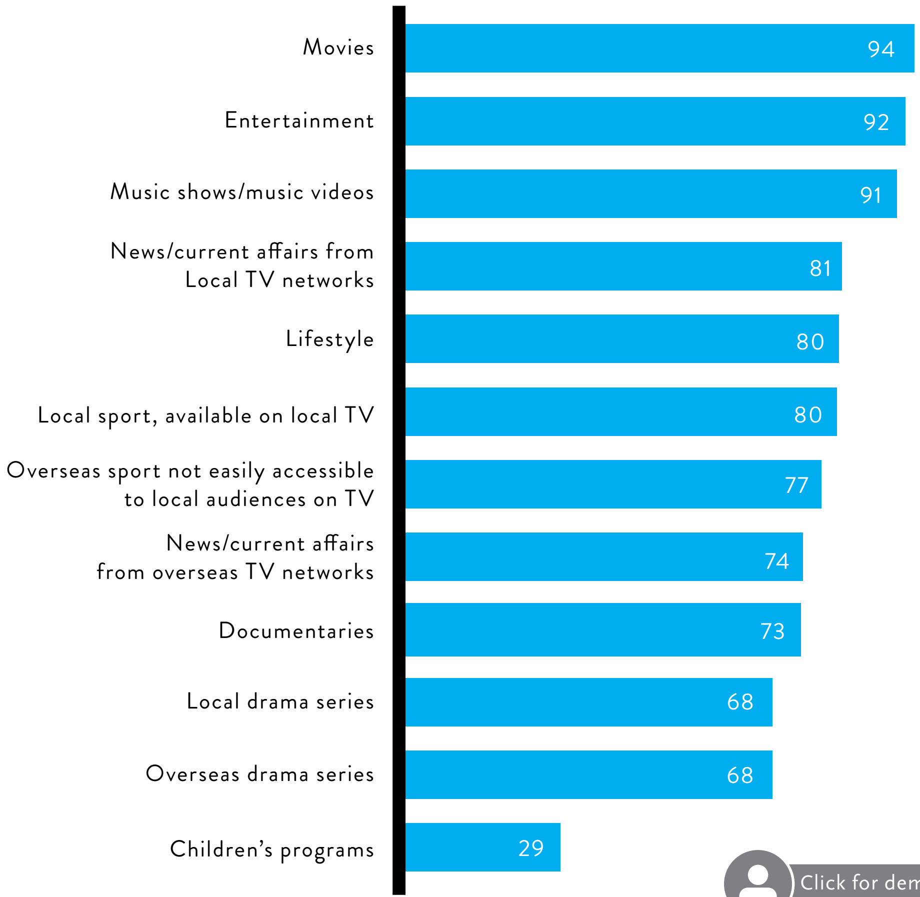
VOD SOURCES
(AMONG THOSE ACCESSING VOD SERVICES)



LOCAL BROADCASTERS ARE MISSING FROM TOP VIDEO DESTINATIONS

Click for demographic differences

VOD CONTENT
(AMONG THOSE ACCESSING VOD SERVICES)



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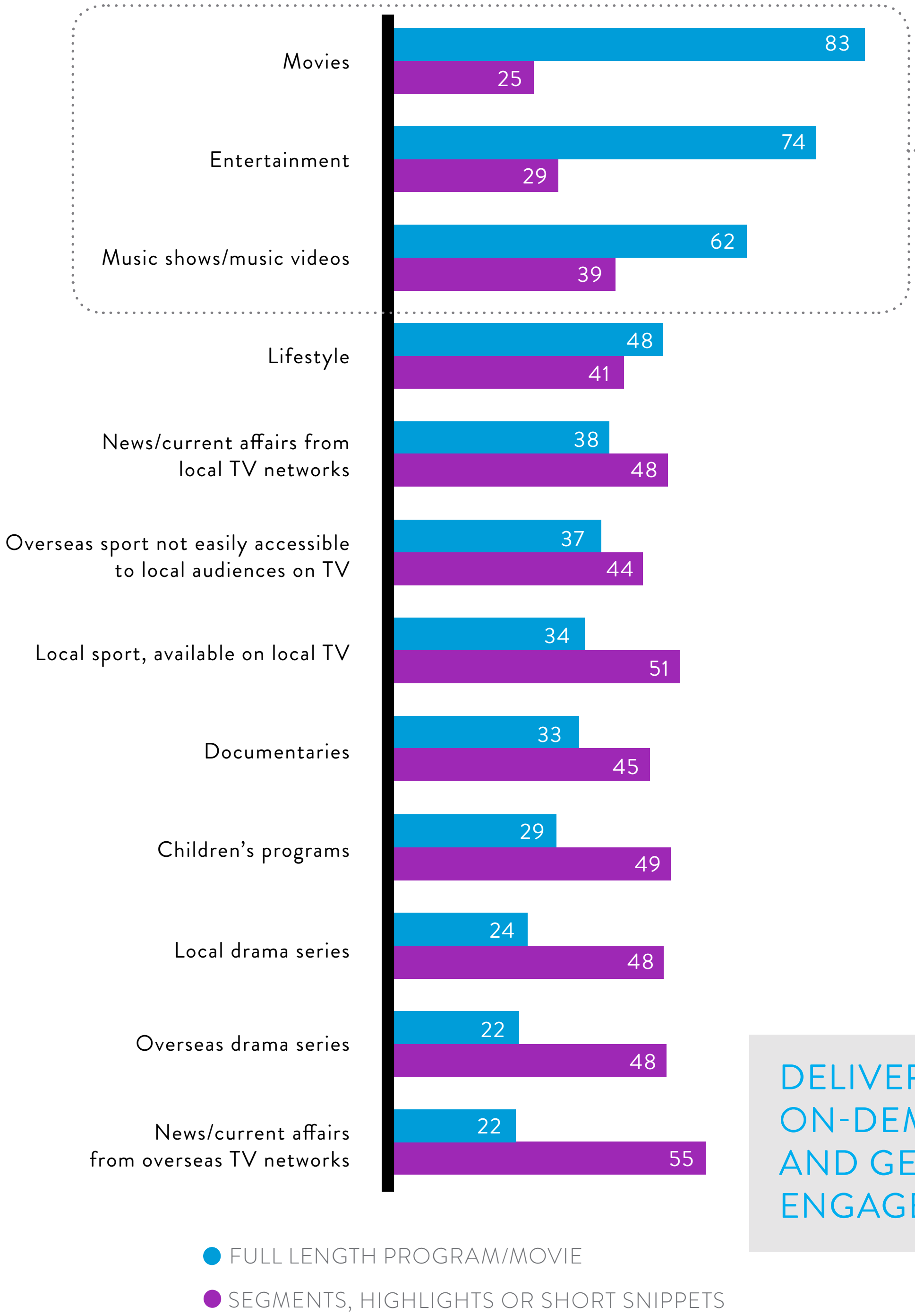
BOTH LONG-FORM AND SHORT-FORM CONTENT IS ACCESSED ONLINE

GENRE SPLIT BY LONG FORM AND SHORT FORM VOD CONTENT



Movies, entertainment and music genres are prominent long-form content

DELIVER A VARIETY OF ON-DEMAND FORMATS AND GENRES TO BUILD ENGAGEMENT

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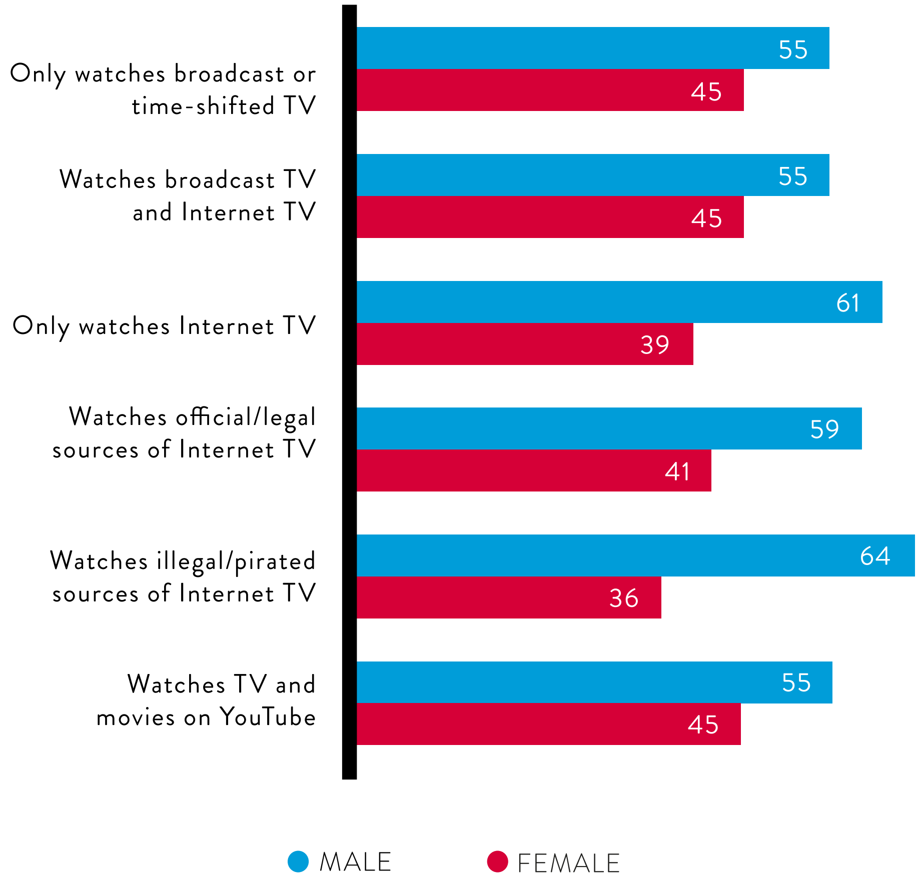
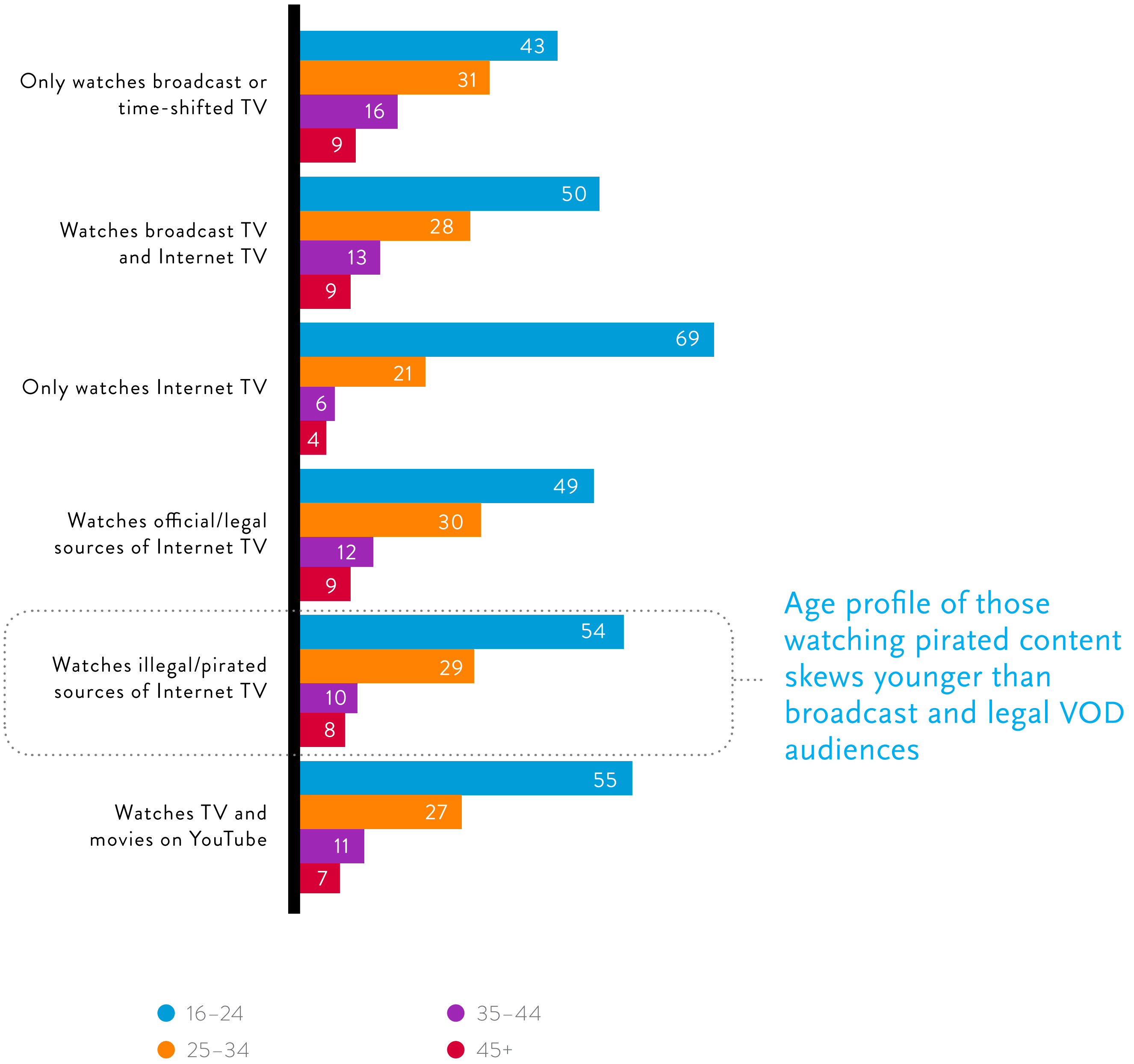
THE TYPICAL AUDIENCE OF PIRATED CONTENT HAS A STRONG MALE SKEW

GENDER COMPOSITION AMONG VIDEO VIEWING SEGMENTS



THE TYPICAL AUDIENCE OF PIRATED CONTENT HAS A STRONG MALE SKEW

AGE COMPOSITION AMONG VIDEO VIEWING SEGMENTS



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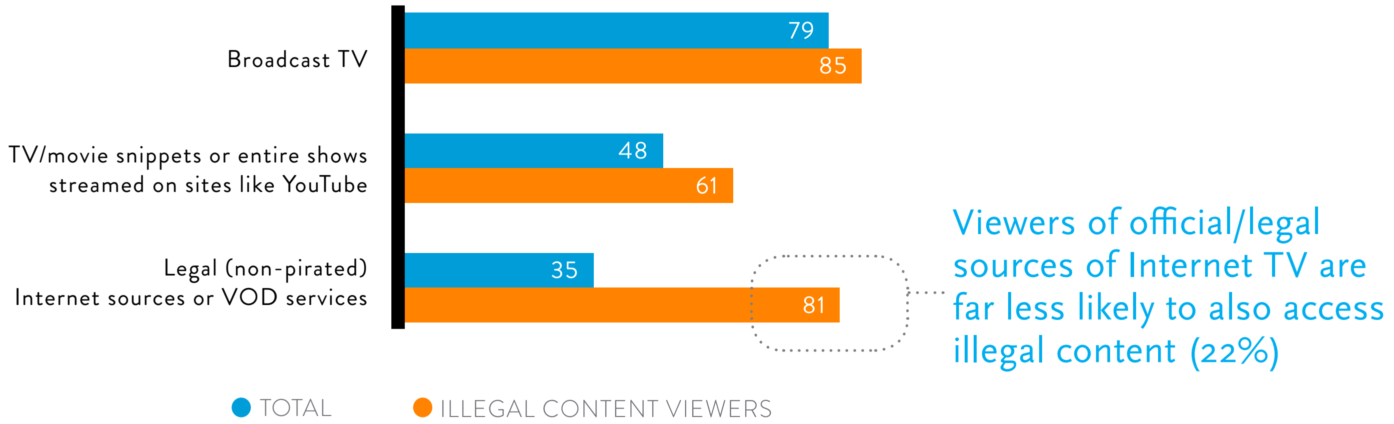
VIEWERS OF PIRATED CONTENT HAVE A STRONG APPETITE FOR BROADCAST TV AND OFFICIAL SOURCES OF INTERNET TV

VIDEO CONTENT ACCESSED BY THOSE WHO WATCH ILLEGAL/ PIRATED CONTENT



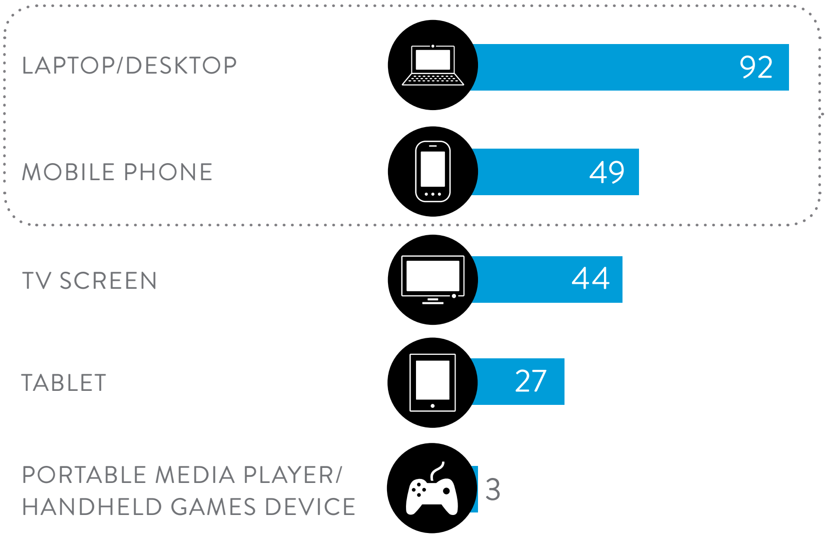
THOSE WHO ACCESS ILLEGAL SOURCES:

- Reveal similar habits to 'legal' viewers in their frequency of accessing VOD content
- Significantly more likely to have been sourcing TV from online sources for three or more years compared with those accessing legal sources
- Significantly more likely to access via a connected TV/ networked TV, tablet computer or mobile phone, but on par when it comes to access via PC

VIEWERS ACCESSING ILLEGAL SOURCES ARE HUNGRY FOR VIDEO CONTENT

WHEN IT COMES TO VOD, PC IS STILL KING

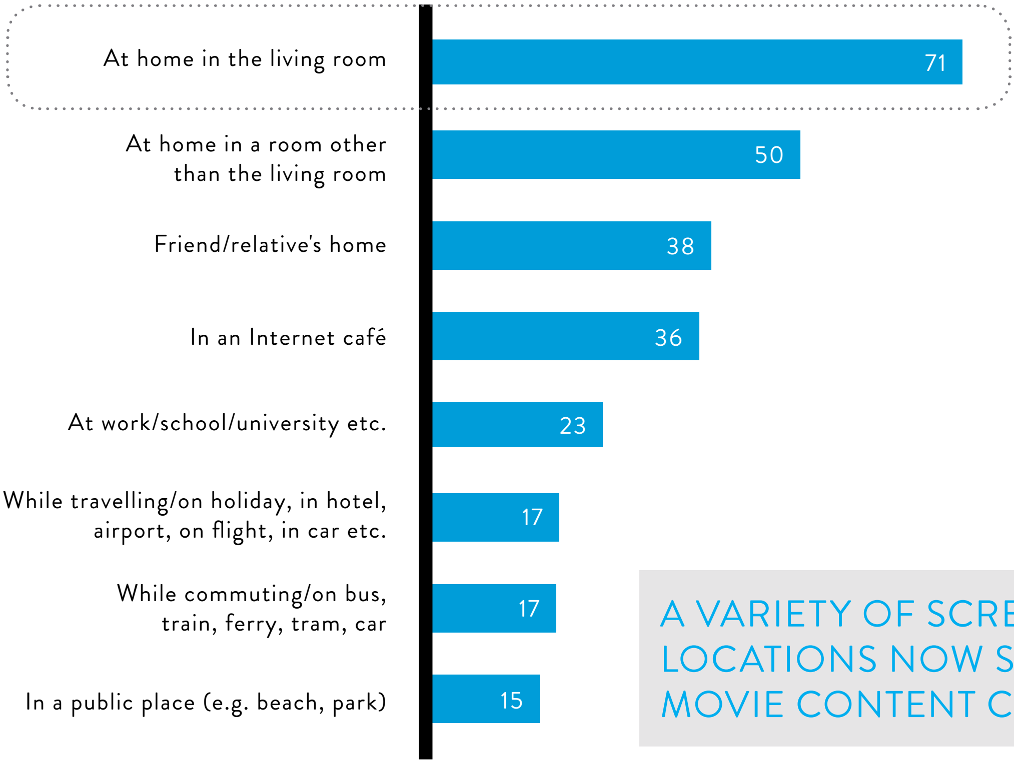
DEVICE FOR VOD ACCESS



Laptops and mobile devices support a broad range of locations for video content consumption

Click for demographic differences

LOCATION OF VIEWING VOD



Home-based viewing dominates

A VARIETY OF SCREENS AND LOCATIONS NOW SUPPORT TV AND MOVIE CONTENT CONSUMPTION

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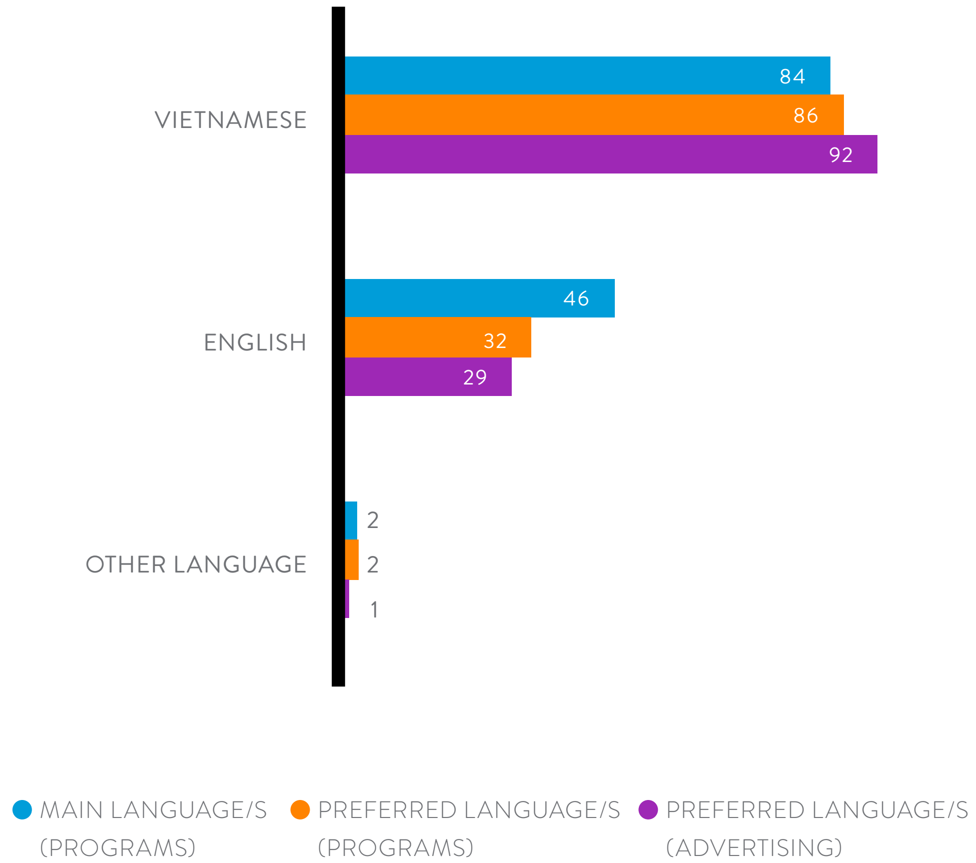
VIETNAMESE IS THE LANGUAGE OF CHOICE FOR ONLINE VIDEO CONTENT

MAIN LANGUAGE/S VIEWED VS. PREFERRED FOR VOD PROGRAMS AND ADVERTISING

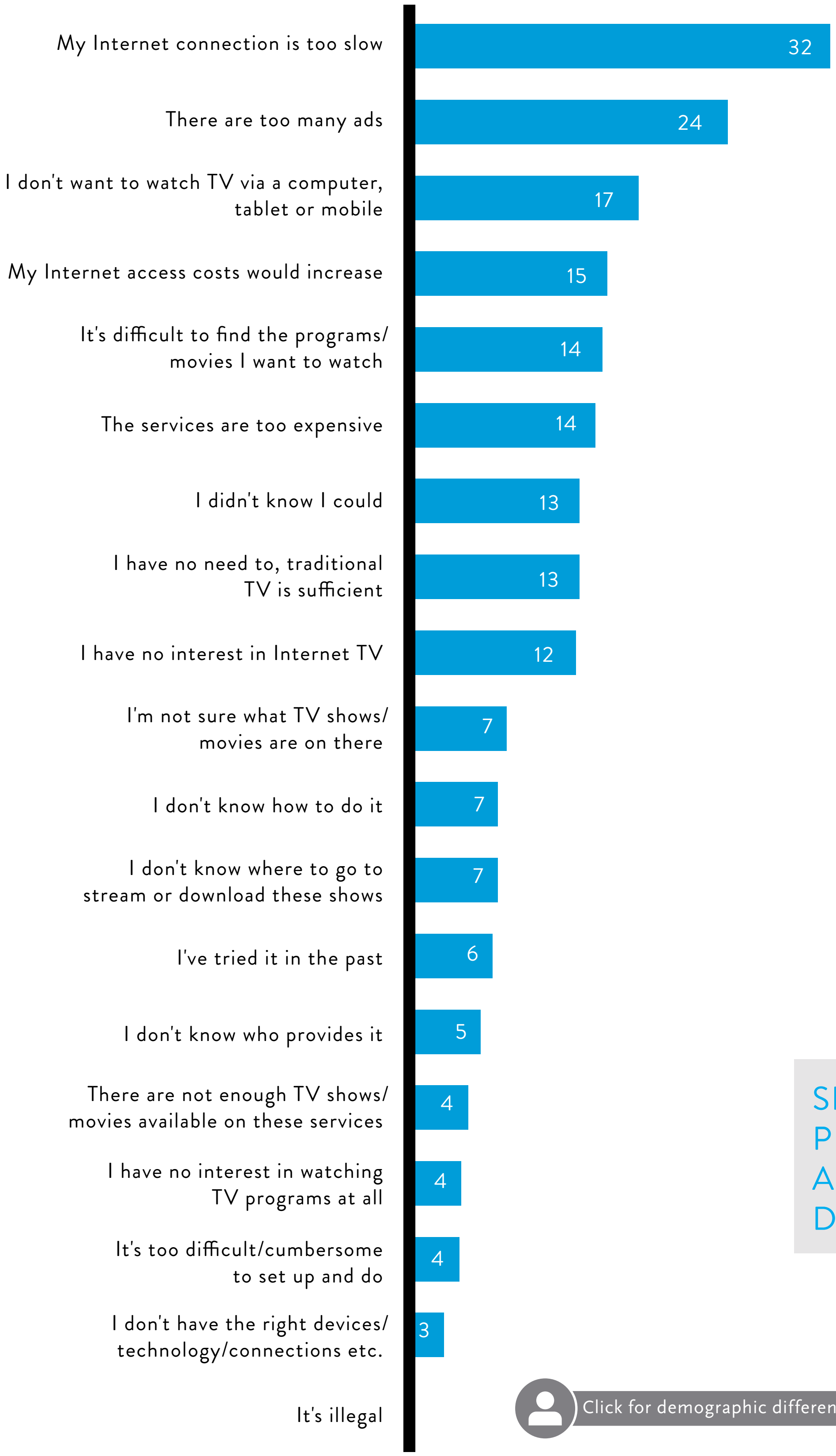


Click for demographic differences

CONTENT DEVELOPED IN LOCAL LANGUAGE IS IMPORTANT FOR THE VIETNAMESE MARKET

CONNECTION SPEED IS THE GREATEST BARRIER TO VOD IN VIETNAM

BARRIERS TO WATCHING INTERNET TV
(AMONG THOSE WHO DON'T CURRENTLY ACCESS)



SPEED AND IMPROVING PERCEPTIONS AROUND ADVERTISING WILL HELP DRIVE UP-TAKE

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CROSS-SCREEN ENGAGEMENT AND SOCIAL TV

CROSS-SCREEN ENGAGEMENT AND SOCIAL TV

Where once the TV screen dominated evening prime time, this lucrative media time period is now shared with online media.

The mainstream adoption of 'dual-screening' (96% of online Vietnamese consumers) and emerging behaviour of 'triple-screening' (more than eight in 10 online Vietnamese) creates opportunities and challenges for advertisers and media owners. The task ahead is for broadcasters and brands to work together to engage audiences with compelling content that keeps viewers attached to the main screen when it matters. Opportunities exist for those who develop smart cross-platform strategies and executions that use the second and third screens to enhance and complement the main screen.

A natural extension of TV engagement using the second and third screen is known as social TV. Now attracting participation among nine in 10 online Vietnamese, social TV provides a new way to encourage viewers to tune in to broadcast TV.

Today's media owners and brands must continue to innovate in their quest to capitalise on dual-screening behaviour and deliver enhanced audience engagement with programs and advertising.

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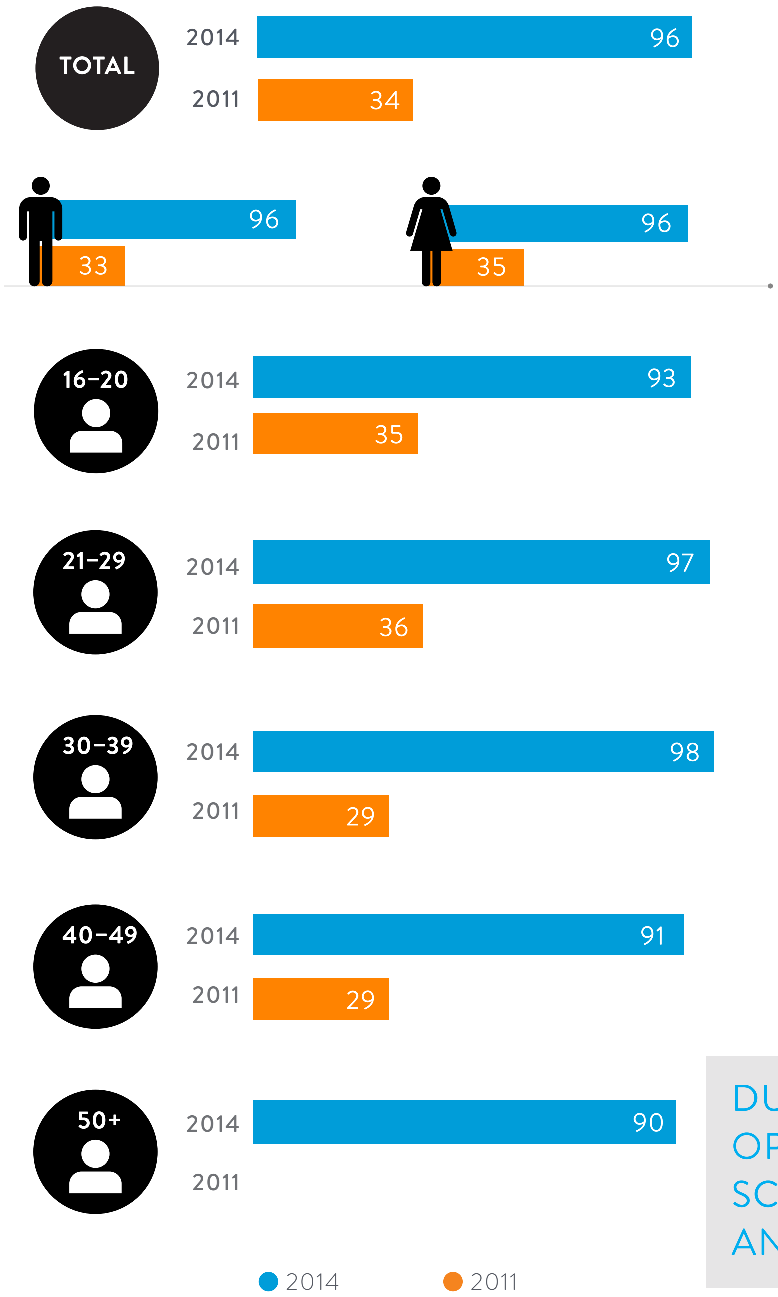
DUAL SCREENING APPROACHING SATURATION

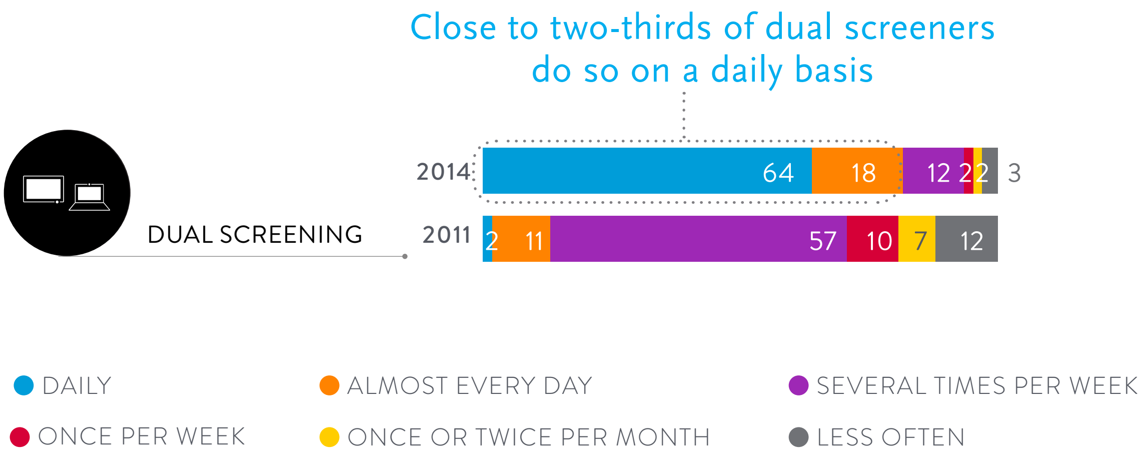
SIMULTANEOUS MEDIA CONSUMPTION (TV + ONLINE) – 2014 VS. 2011



DUAL SCREENING REPRESENTS AN OPPORTUNITY TO DRIVE CROSS-SCREEN CAMPAIGN ENGAGEMENT AND RESONANCE

DUAL SCREENING IS A POPULAR DAILY ACTIVITY

FREQUENCY OF DUAL SCREENING – 2014 VS. 2011
(AMONG THOSE WHO DUAL SCREEN)



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PREVALENCE OF DUAL SCREENING HIGHLIGHTS AN EVOLUTION IN MEDIA CONSUMPTION BEHAVIOUR

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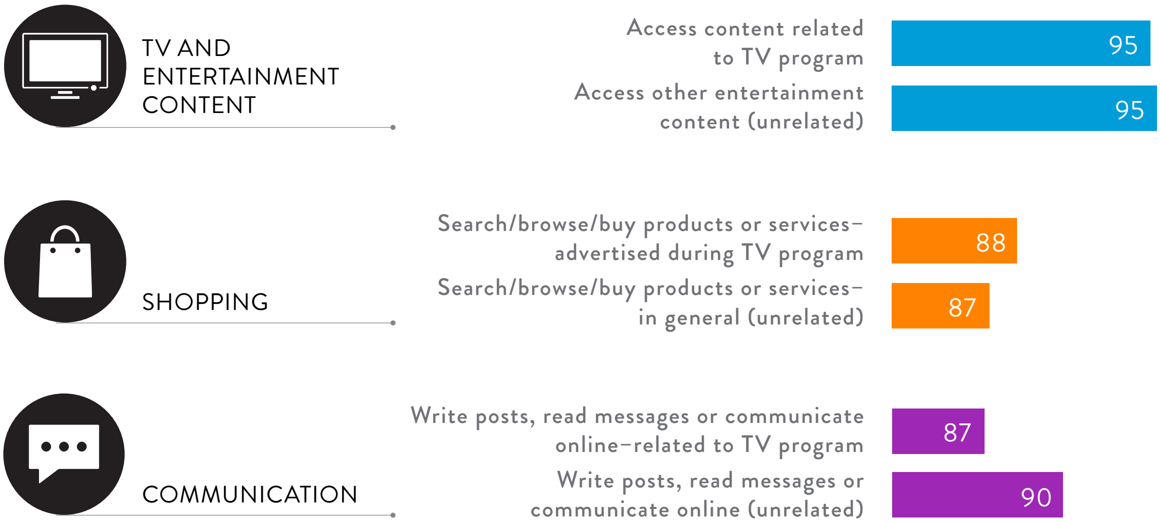
DUAL SCREENERS HAVE HIGH LEVELS OF BEHAVIOUR BOTH RELATED AND UNRELATED TO WHAT THEY ARE WATCHING ON TV

ONLINE ACTIVITY CONDUCTED WHILE DUAL SCREENING
(AMONG THOSE WHO DUAL SCREEN)



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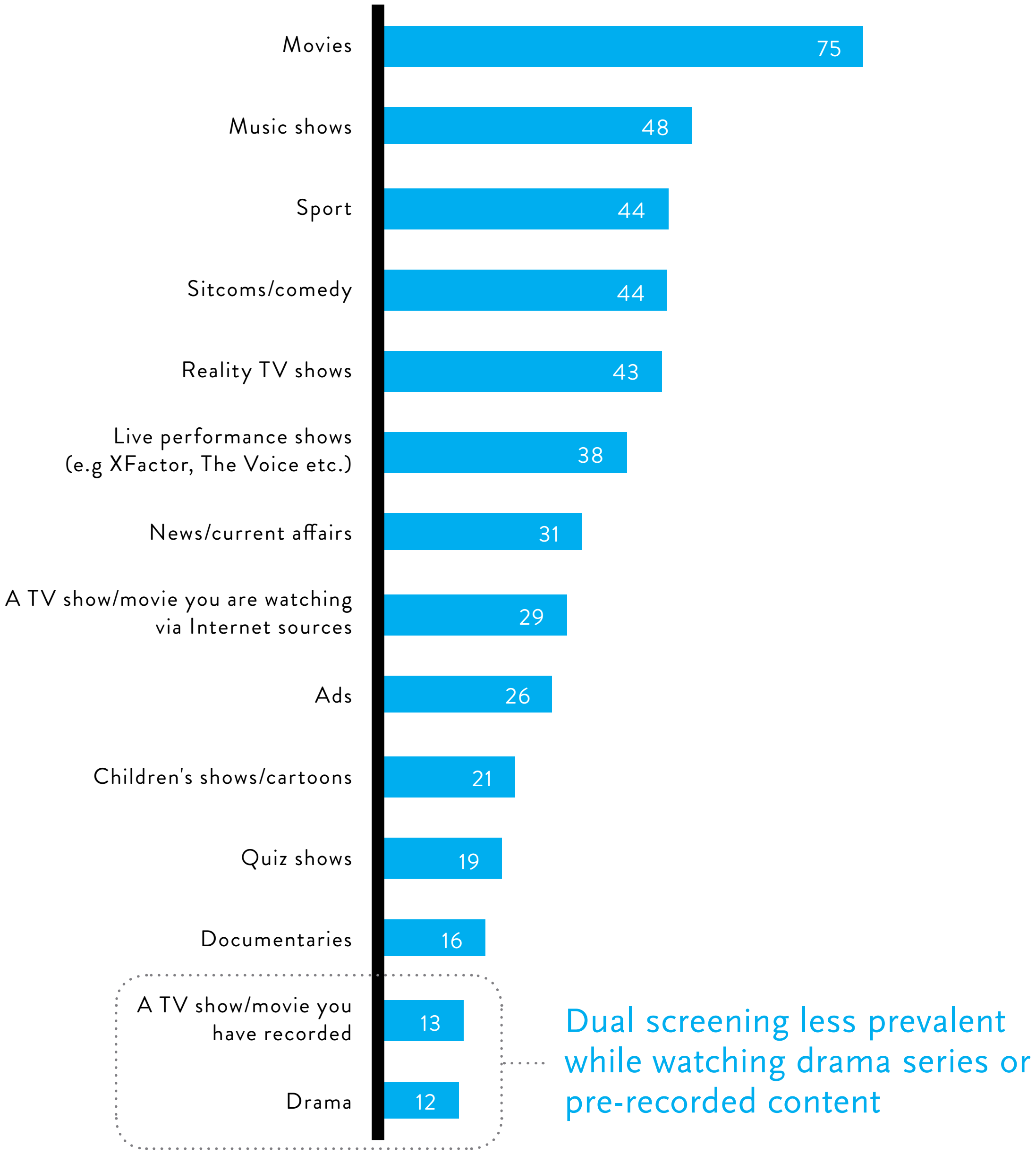
RESEARCH AND PURCHASE BEHAVIOUR ON THE SECOND SCREEN HIGHLIGHTS A KEY OPPORTUNITY FOR BRANDS AND RETAILERS

DUAL SCREENING OCCURS ACROSS A VARIETY OF GENRES BUT MOST NOTABLY WHILE VIEWING MOVIES ON TV

GENRE WATCHED ON TV WHILE DUAL SCREENING
(AMONG THOSE WHO DUAL SCREEN)



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TRADITIONAL TV IS STILL LARGELY A 'LEAN BACK' MEDIUM WHILE THE SECOND SCREEN CREATES LEAN FORWARD ACTIVITY

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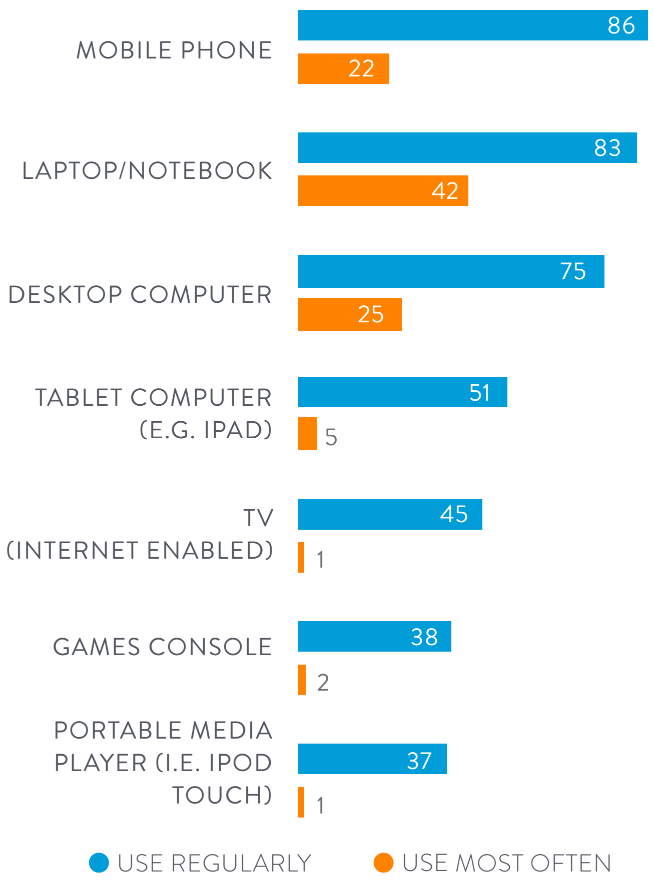
LAPTOPS HAVE OVERTAKEN DESKTOPS AS THE DOMINANT DUAL SCREENING DEVICE

DEVICE USED FOR DUAL SCREENING



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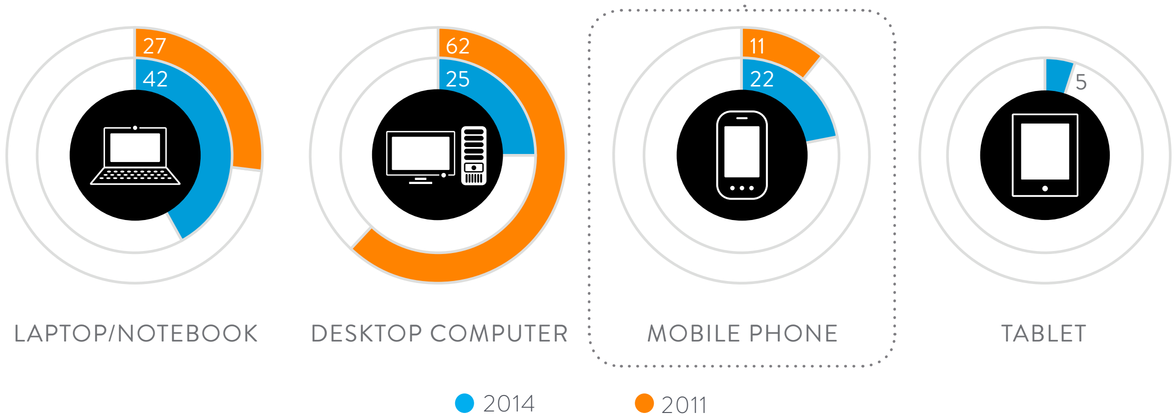
CONVENIENCE SCREENS LIKE SMARTPHONES AND LAPTOPS ARE DRIVING DUAL SCREENING BEHAVIOUR AND CREATING CROSS-SCREEN MARKETING OPPORTUNITIES

DEVICE USED MOST OFTEN FOR DUAL SCREENING – 2014 VS. 2011

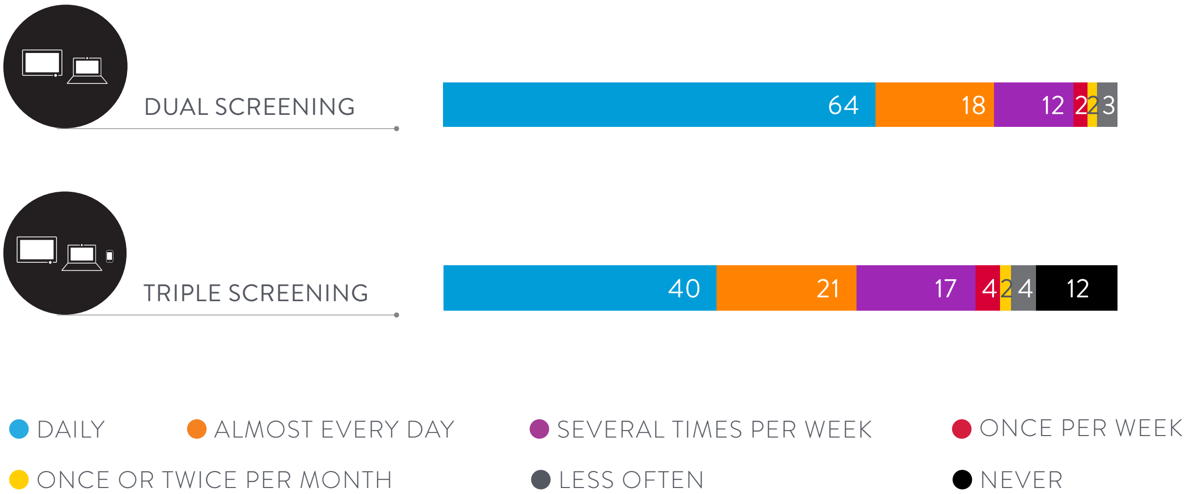
Smartphone has seen 2X growth as most used device for dual screening



IS TRIPLE SCREENING THE NEW DUAL SCREENING?

84 percent of online Vietnamese are triple screeners. Among the dual screening population more than three in four triple screen several times per week

FREQUENCY OF DUAL SCREENING VS. 'TRIPLE SCREENING'
(AS A PROPORTION OF DUAL SCREENERS)



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TRIPLE SCREENING PRESENTS CHALLENGES IN ENGAGING THE AUDIENCE WITH MAIN SCREEN CONTENT, BUT MORE SCREENS MEANS MORE OPPORTUNITIES FOR EXTENDED BRAND AND PROGRAM ENGAGEMENT ACTIVITIES

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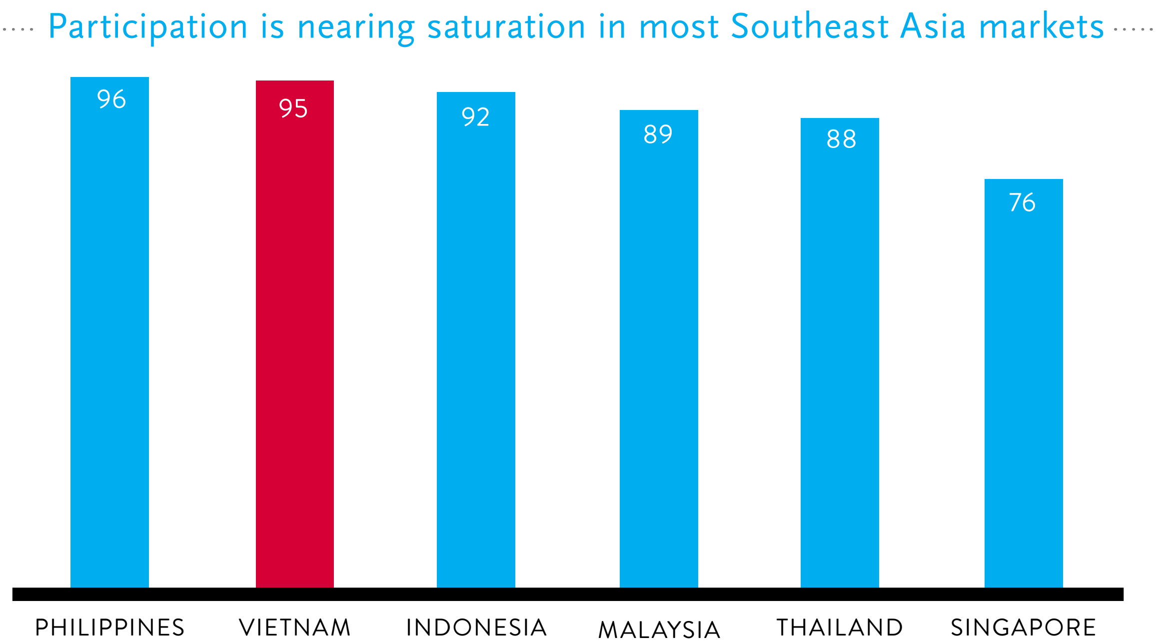
SOCIAL TV

EXTENDED ENGAGEMENT OF TV PROGRAMS AND MOVIES ONLINE IS COMMONPLACE IN SOUTHEAST ASIA

PARTICIPATION WITH SOCIAL TV

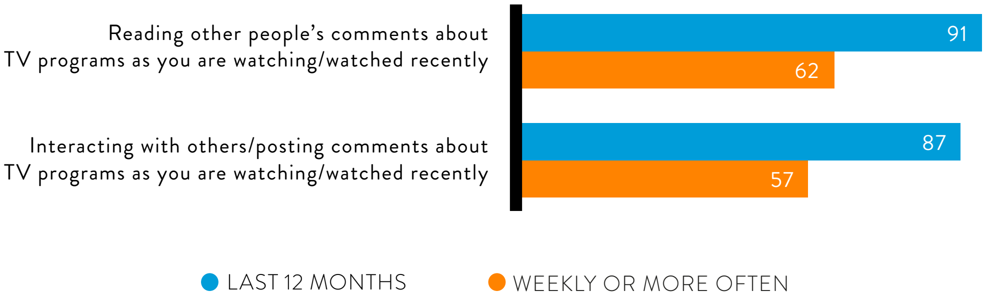


VIETNAMESE ONLINE CONSUMERS ARE EMBRACING SOCIAL TV ACTIVITY

SOCIAL TV IS A NATURAL EXTENSION OF TV ENGAGEMENT USING THE SECOND SCREEN

Majority of online Vietnamese have started participating in social TV

PARTICIPATION IN SOCIAL TV ACTIVITY DURING 2014
(AMONG TOTAL ONLINE POPULATION)



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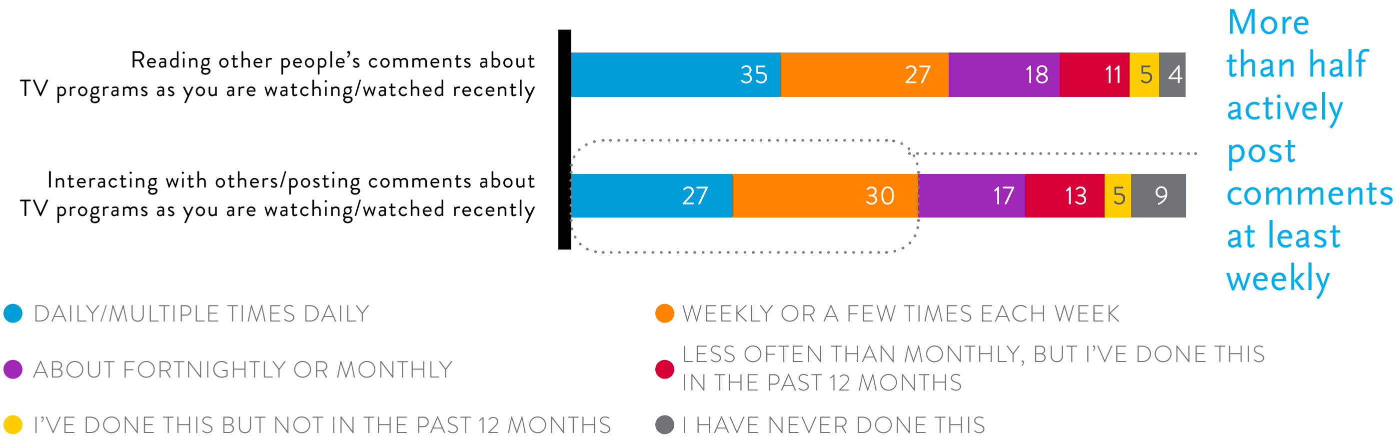
SOCIAL TV IS A NEW ENGAGEMENT METRIC FOR TV'S EXTENDED REACH AND INFLUENCE ACROSS SCREENS

ONE-THIRD ENGAGE WITH REAL TIME TV-RELATED DISCUSSION ON A DAILY BASIS

FREQUENCY OF PARTICIPATION IN SOCIAL TV ACTIVITY
(AMONG TOTAL ONLINE POPULATION)



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PASSIVE BEHAVIOUR IS MORE PREVALENT THAN ACTIVE POSTING, BUT BOTH INDICATE ENGAGEMENT WITH TV CONTENT

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ADVERTISING ENGAGEMENT AND PREFERENCES

ADVERTISING ENGAGEMENT AND PREFERENCES

The growth of online video consumption is creating more opportunities for advertisers to reach their target audience.

Consumers across Southeast Asia accept advertising as part of their online video experience. Most online Vietnamese (65%) report a preference for free content that is ad-supported over paying for ad-free content.

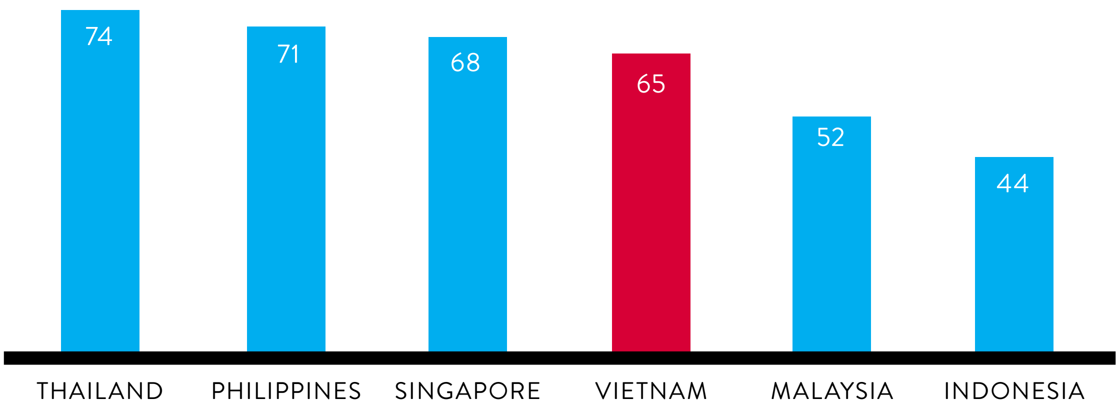
Consumer engagement with online video content is high and this in turn leads to an attentive audience for advertising surrounding the online video content. Most Vietnamese consumers who watch online video can recall seeing advertising while they were watching. Automotive, beverage and travel categories lead awareness for Vietnamese, suggesting that advertisers in those categories are taking advantage of this new media.

Most consumers acknowledge the power of this advertising – a majority say that they have searched for a product and many have made a purchase after seeing an ad while watching online video.

Advertising in traditional media is still powerful, with consumers most likely to cite TV as having the most impact on their purchases. But as online advertising raises its profile and increases in relevance we are likely to see an increase in perceptions of its importance.

DIGITAL CONSUMERS ACROSS SOUTHEAST ASIA REALISE ONLINE VIDEO CONTENT IS NOT FREE

PREFERENCE TOWARD AD-BASED MODEL FOR ONLINE VIDEO



65 PERCENT OF VIETNAMESE VIDEO CONSUMERS PREFER FREE CONTENT THAT IS AD-SUPPORTED

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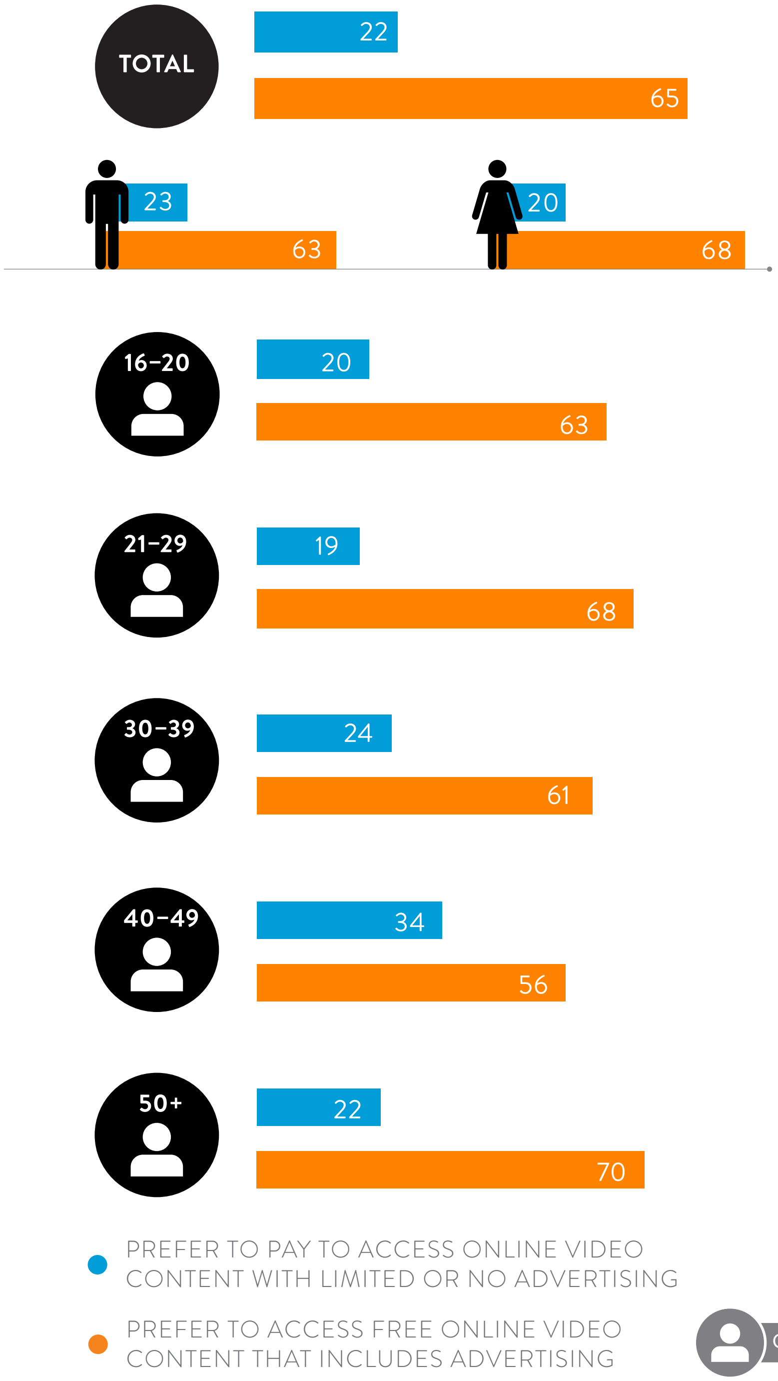
MAJORITY PREFER AD-BASED MODELS OF VIDEO CONTENT ACCESS

PREFERRED ACCESS MODEL FOR ONLINE VIDEO CONTENT
(AMONG THOSE WHO ACCESS ONLINE VIDEO)



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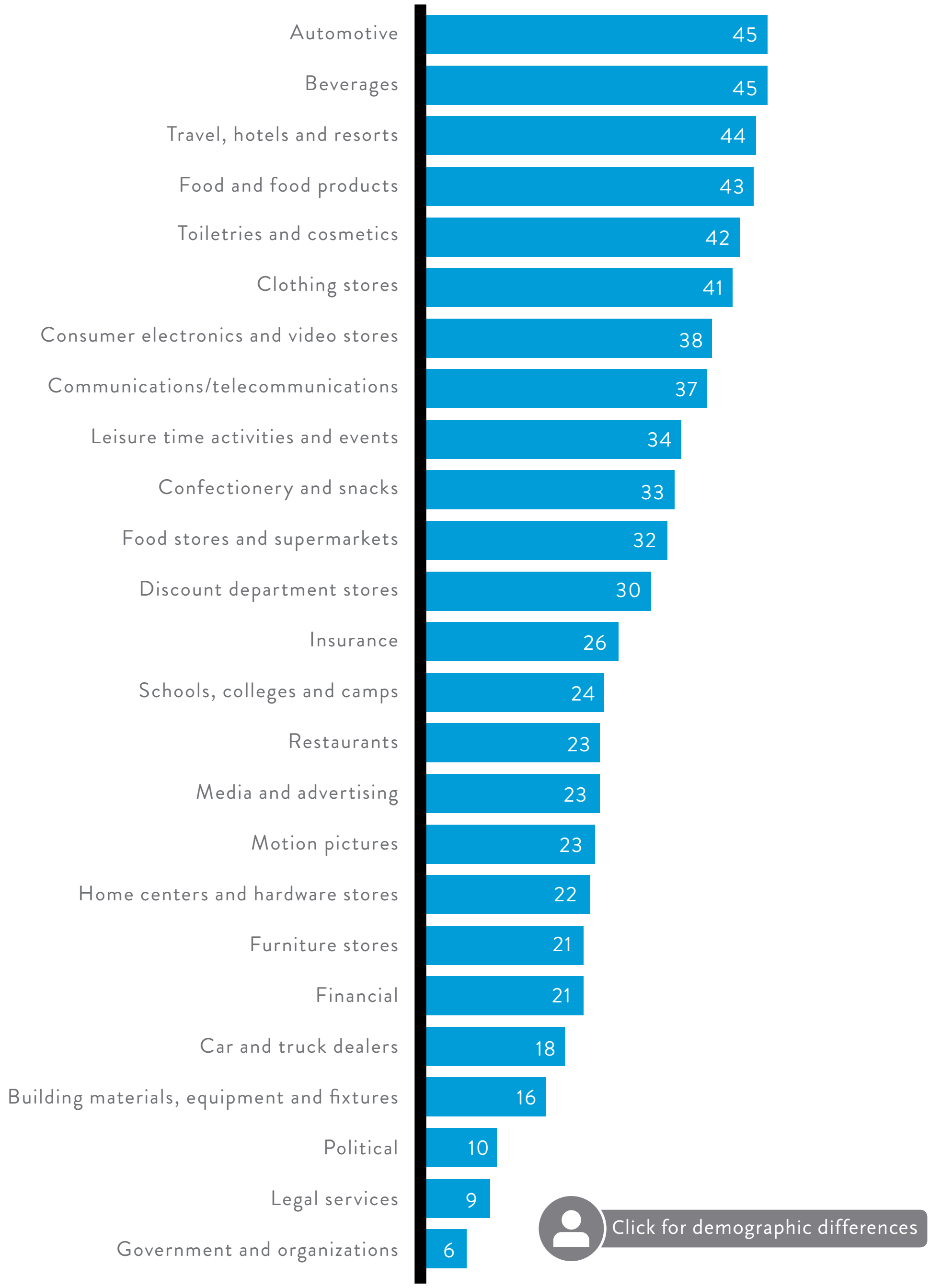
OLDER CONSUMERS (AGED 30+) ARE MORE WILLING TO PAY FOR CONTENT

ONLINE VIDEO VIEWERS EXPOSED TO A VARIETY OF CATEGORIES

CATEGORY OF ONLINE VIDEO ADVERTISING RECALLED IN PAST MONTH (AMONG THOSE WHO ACCESS ONLINE VIDEO)



AUTOMOTIVE, BEVERAGE AND TRAVEL CATEGORIES ARE MOST LIKELY TO BE RECALLED

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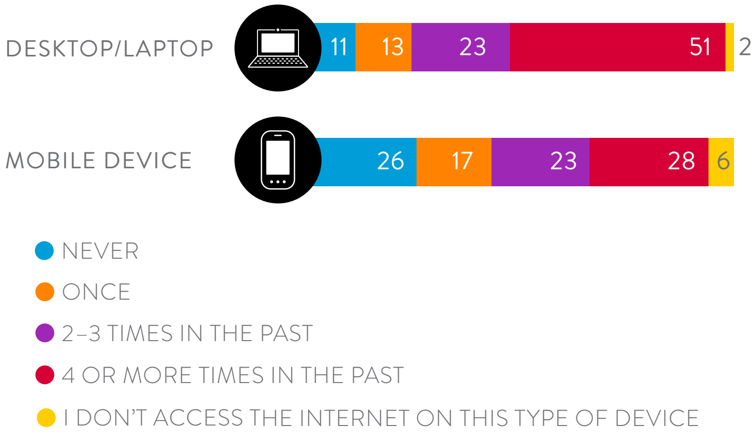
VIDEO ADVERTISING STIMULATES PRODUCT SEARCH AND PURCHASE

PC and mobile devices all being utilised through the conversion process

USING 'SEARCH' AFTER SEEING A VIDEO AD ON:



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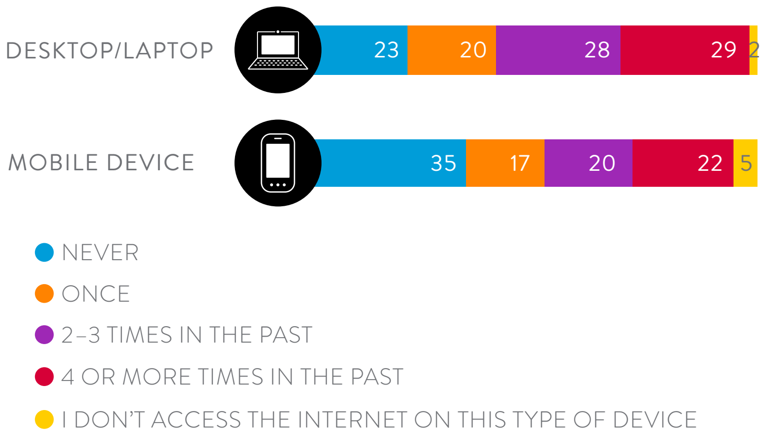
MAKING A PURCHASE AFTER SEEING A VIDEO AD ON:



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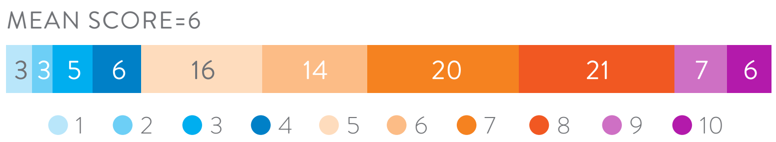
ONLINE VIDEO ADS CAN BE THE START OF A CONSUMER PURCHASE CONSIDERATION PATH

RELEVANT ADS CAN IMPROVE BRAND FAVOURABILITY

More than three in four online consumers agree that relevant ads improve their favourability toward the brand being advertised

DO RELEVANT ADS MAKE YOU FEEL MORE FAVOURABLE TOWARD THE BRAND BEING ADVERTISED?
(HIGHER SCORE = GREATER LIKELIHOOD THAT RELEVANT ADS RESULT IN GREATER BRAND FAVORABILITY)



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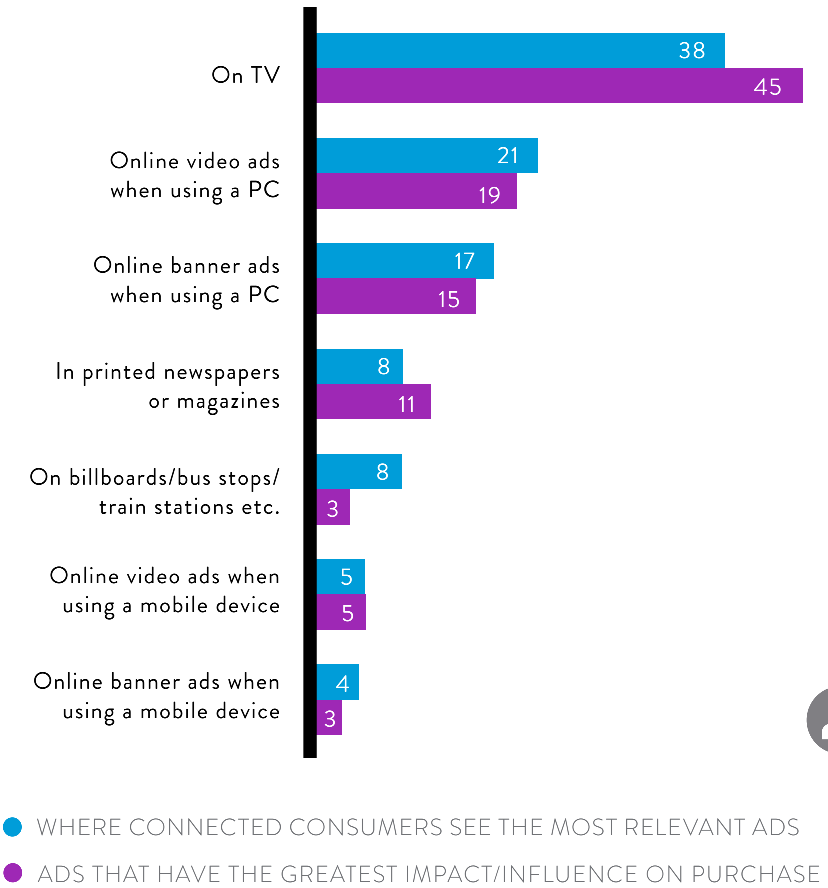
ATTITUDES TOWARD MOST INFLUENTIAL AD PLACEMENT AND FORMATS



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VIDEO AD FORMATS ARE DEEMED INFLUENTIAL AMONG DIGITAL CONSUMERS

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APPENDICES

DETAILED DEMOGRAPHIC TABLES

TAKING A CLOSER LOOK AT THE DATA

EXHIBIT 1 – TECHNOLOGY IN THE HOME IN 2014, SPLIT BY GENDER AND AGE

BACK

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)
NOTE: RELATES TO HOUSEHOLD OWNERSHIP WITH EXCEPTION OF SMARTPHONE WHICH RELATES TO PERSONAL OWNERSHIP

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
Home Internet connection	75%	74%	78%	75%	73%	80%	80%	86%
Smartphone	82%	83%	81%	77%	80%	87%	86%	90%
Laptop/notebook	81%	78%	86%	74%	84%	83%	75%	79%
Desktop computer	74%	72%	77%	72%	72%	79%	79%	80%
Pay TV	70%	68%	73%	72%	65%	80%	82%	64%
Wireless LAN	58%	59%	58%	54%	57%	67%	54%	57%
Connected TV	49%	48%	50%	50%	47%	46%	62%	56%
Smart TV	37%	37%	37%	34%	34%	39%	58%	39%
Tablet	35%	34%	36%	26%	31%	50%	45%	33%
Connected TV via separate device	33%	31%	35%	34%	34%	28%	35%	27%
Games console	19%	20%	19%	14%	20%	19%	23%	14%

EXHIBIT 2 – SMARTPHONE TENURE, SPLIT BY GENDER AND AGE

BACK

BASE: ONLINE CONSUMERS 16+ WHO USE A SMARTPHONE (N=883 IN 2014)

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
Less than 1 year	21%	19%	24%	25%	22%	16%	15%	29%
1 year to less than 2 years	39%	41%	37%	53%	42%	27%	32%	31%
2 years to less than 4 years	29%	28%	29%	18%	26%	39%	36%	34%
4 years or more	11%	12%	10%	4%	10%	17%	17%	7%

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EXHIBIT 3 – TECHNOLOGY IN THE HOME FUTURE INTENDED PURCHASE IN NEXT 12 MONTHS, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
Smart TV	43%	44%	42%	42%	44%	45%	34%	48%
Connected TV via separate device	41%	42%	40%	34%	39%	52%	39%	41%
Tablet	40%	38%	42%	45%	41%	32%	38%	31%
Games console	32%	34%	29%	34%	34%	27%	27%	28%
Wireless LAN	24%	24%	25%	25%	25%	17%	34%	18%
Pay TV	18%	18%	17%	12%	21%	12%	11%	28%
Smartphone	16%	15%	18%	20%	18%	11%	13%	7%
Home internet connection	15%	17%	12%	12%	16%	14%	13%	12%
Laptop/notebook	14%	17%	11%	20%	12%	14%	23%	14%
Desktop computer	9%	10%	8%	5%	11%	7%	7%	12%

EXHIBIT 4 – SMARTPHONE OPERATING SYSTEM IN 2014, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO USE A SMARTPHONE (N=883 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	883	505	378	111	479	180	82	31
Android	64%	66%	63%	66%	63%	69%	62%	58%
iOS (Apple)	19%	21%	17%	20%	16%	23%	24%	29%
Windows 8	9%	8%	9%	8%	12%	4%	3%	9%
Windows 7	3%	2%	3%	1%	3%	2%	8%	0%
Symbian	2%	1%	4%	3%	3%	0%	2%	0%
BlackBerry OS	0%	0%	1%	1%	0%	0%	0%	2%
WinMob	0%	0%	0%	0%	0%	0%	1%	0%
bada	0%	0%	0%	1%	0%	0%	0%	0%

EXHIBIT 5 – ENVIRONMENT INTERNET IS ACCESSED, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
EVER ACCESSED								
At home on weekdays/evenings	89%	86%	92%	88%	91%	88%	85%	79%
At work	66%	64%	68%	25%	65%	89%	81%	76%
Internet café	59%	60%	58%	64%	63%	57%	43%	27%
At home on the weekend	58%	56%	62%	58%	58%	60%	59%	60%
In cafés/bars restaurants etc (excluding Internet café)	57%	57%	57%	52%	62%	56%	45%	33%
Friend/ relative's home	55%	54%	56%	64%	60%	47%	43%	15%
At school, university, in a library	52%	50%	54%	69%	62%	28%	29%	8%
While travelling/ in hotel rooms, airport etc.	37%	34%	40%	31%	38%	39%	39%	21%
While commuting/ on transport	35%	33%	38%	35%	39%	30%	26%	16%
In a public place (e.g. beach, pool, park)	33%	33%	33%	31%	36%	32%	21%	29%
In a shopping centre/in a shop	24%	22%	27%	28%	24%	26%	21%	10%
At an event, gig, concert, performance, festival, show etc.	23%	23%	23%	18%	25%	25%	20%	7%
While out and about/on the go	20%	21%	19%	24%	21%	16%	20%	14%
Other location, please specify	0%	0%	0%	0%	0%	0%	0%	0%
Unsure	0%	0%	0%	0%	0%	0%	0%	0%
None of these	0%	0%	0%	0%	0%	0%	0%	0%

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EXHIBIT 5 – ENVIRONMENT INTERNET IS ACCESSED, SPLIT BY GENDER AND AGE (CONT'D)
BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
REGULARLY ACCESSED								
At home on weekdays/evenings	80%	77%	84%	80%	84%	73%	79%	67%
At work	48%	48%	48%	12%	45%	76%	62%	47%
At home on the weekend	41%	39%	44%	41%	40%	43%	46%	36%
Internet café	33%	34%	30%	43%	34%	30%	25%	11%
In cafés/bars restaurants etc (excluding Internet café)	28%	27%	29%	21%	30%	29%	28%	18%
At school, university, in a library	28%	28%	28%	43%	33%	14%	15%	6%
Friend/ relative's home	24%	23%	24%	31%	25%	22%	15%	7%
While travelling/ in hotel rooms, airport etc.	15%	13%	18%	12%	15%	17%	21%	10%
While commuting/ on transport	14%	15%	13%	14%	16%	12%	14%	8%
In a public place (e.g. beach, pool, park)	14%	14%	15%	10%	17%	10%	13%	17%
At an event, gig, concert, performance, festival, show etc.	10%	9%	11%	8%	10%	10%	13%	2%
In a shopping centre/in a shop	9%	9%	9%	12%	9%	8%	11%	4%
While out and about/on the go	9%	9%	8%	8%	9%	6%	13%	6%
Unsure	1%	1%	0%	1%	0%	0%	0%	9%
Other location, please specify	1%	1%	0%	0%	1%	1%	0%	0%
None of these	0%	0%	0%	0%	0%	1%	2%	0%

EXHIBIT 5 – ENVIRONMENT INTERNET IS ACCESSED, SPLIT BY GENDER AND AGE (CONT'D)

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
MOST OFTEN ACCESSED								
At home on weekdays/evenings	63%	63%	62%	71%	70%	44%	48%	51%
At work	23%	21%	25%	2%	17%	47%	37%	29%
At home on the weekend	7%	7%	6%	14%	5%	4%	7%	18%
At school, university, in a library	3%	3%	3%	5%	3%	3%	1%	0%
Internet café	1%	2%	1%	3%	1%	0%	1%	0%
In cafés/bars restaurants etc (excluding Internet café)	1%	2%	1%	1%	2%	1%	1%	0%
Unsure	1%	1%	1%	2%	0%	0%	2%	0%
Friend/ relative's home	1%	0%	1%	0%	1%	0%	2%	0%
Other location, please specify	0%	0%	0%	0%	0%	0%	0%	0%
While travelling/ in hotel rooms, airport etc.	0%	0%	1%	0%	0%	0%	0%	0%
While out and about/on the go	0%	0%	0%	0%	0%	0%	0%	0%
In a public place (e.g. beach, pool, park)	0%	0%	0%	0%	0%	0%	0%	2%
While commuting/ on transport	0%	0%	0%	0%	0%	0%	0%	0%
In a shopping centre/in a shop	0%	0%	0%	1%	0%	0%	0%	0%
At an event, gig, concert, performance, festival, show etc.	0%	0%	0%	0%	0%	0%	1%	0%
None of these	0%	0%	0%	0%	0%	0%	0%	0%

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EXHIBIT 6 – DEVICES EVER, REGULARLY AND MOST OFTEN USED TO ACCESS THE INTERNET, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
EVER ACCESSED								
Laptop/notebook	82%	82%	82%	71%	86%	84%	72%	77%
Mobile phone	81%	79%	84%	80%	82%	83%	77%	77%
Desktop PC	63%	61%	66%	58%	59%	72%	74%	72%
Tablet	27%	26%	28%	24%	23%	41%	36%	20%
Connected TV	9%	10%	6%	9%	8%	10%	14%	0%
Handheld media player	4%	4%	4%	3%	4%	4%	6%	0%
Games console	3%	4%	1%	0%	3%	4%	4%	0%
PVR/DVR	1%	1%	2%	0%	1%	2%	4%	0%
REGULARLY ACCESSED								
Laptop/notebook	64%	65%	63%	54%	70%	58%	57%	65%
Mobile phone	47%	43%	53%	45%	48%	46%	46%	51%
Desktop PC	44%	43%	45%	40%	38%	53%	62%	53%
Tablet	12%	10%	13%	8%	8%	16%	25%	16%
Connected TV	3%	3%	2%	0%	3%	2%	9%	0%
Games console	1%	1%	1%	0%	1%	1%	3%	0%
Handheld media player	1%	1%	1%	0%	1%	1%	4%	0%
PVR/DVR	0%	0%	1%	0%	0%	0%	3%	0%
MOST OFTEN USED								
Laptop/notebook	48%	51%	45%	44%	55%	43%	29%	39%
Desktop PC	30%	31%	30%	30%	25%	40%	39%	43%
Mobile phone	18%	15%	20%	22%	17%	13%	21%	17%
Tablet	3%	2%	4%	3%	2%	3%	10%	0%
Handheld media player	0%	0%	0%	0%	0%	0%	1%	0%
Connected TV	0%	0%	0%	0%	0%	0%	0%	0%
Games console	0%	0%	0%	0%	0%	0%	0%	0%
PVR/DVR	0%	0%	0%	0%	0%	0%	0%	0%

EXHIBIT 7 – MEDIA ACTIVITIES BY TIME OF DAY, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
USING THE INTERNET								
Early morning Before 9am	47%	48%	47%	55%	46%	46%	51%	37%
Morning 9am – before 12pm	73%	72%	74%	65%	74%	75%	75%	71%
Lunch time 12pm – before 2pm	71%	71%	72%	65%	71%	75%	73%	64%
Early afternoon 2pm – before 4pm	76%	76%	76%	73%	78%	73%	74%	63%
Late afternoon 4pm – before 6pm	76%	76%	75%	76%	77%	71%	79%	68%
Early evening 6pm – before 8pm	74%	76%	72%	78%	74%	70%	73%	77%
Mid evening 8pm – before 10pm	81%	83%	79%	76%	85%	78%	78%	69%
Late evening 10pm onwards	58%	58%	59%	52%	63%	49%	64%	41%
LISTENING TO THE RADIO								
Early morning Before 9am	32%	34%	29%	16%	28%	41%	50%	49%
Morning 9am – before 12pm	6%	6%	7%	3%	7%	6%	9%	0%
Lunch time 12pm – before 2pm	7%	7%	6%	7%	7%	5%	7%	11%
Early afternoon 2pm – before 4pm	4%	4%	5%	2%	4%	5%	8%	6%
Late afternoon 4pm – before 6pm	6%	7%	5%	5%	5%	8%	9%	6%
Early evening 6pm – before 8pm	5%	5%	5%	6%	4%	7%	9%	0%
Mid evening 8pm – before 10pm	10%	10%	9%	9%	10%	11%	8%	3%
Late evening 10pm onwards	18%	17%	19%	24%	19%	10%	15%	24%

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EXHIBIT 7 – MEDIA ACTIVITIES BY TIME OF DAY, SPLIT BY GENDER AND AGE (CONT'D)

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
READING PRINTED NEWSPAPER								
Early morning Before 9am	31%	31%	32%	26%	31%	39%	23%	41%
Morning 9am – before 12pm	13%	14%	12%	22%	11%	12%	15%	9%
Lunch time 12pm – before 2pm	9%	8%	10%	3%	9%	9%	17%	6%
Early afternoon 2pm – before 4pm	7%	7%	7%	5%	6%	8%	12%	3%
Late afternoon 4pm – before 6pm	9%	10%	8%	8%	8%	9%	14%	10%
Early evening 6pm – before 8pm	10%	11%	8%	6%	11%	8%	14%	4%
Mid evening 8pm – before 10pm	9%	9%	10%	9%	8%	12%	11%	14%
Late evening 10pm onwards	8%	8%	8%	4%	9%	9%	8%	2%
WATCHING TRADITIONAL TV								
Early morning Before 9am	18%	16%	21%	10%	16%	19%	32%	29%
Morning 9am – before 12pm	14%	16%	12%	17%	13%	14%	17%	21%
Lunch time 12pm – before 2pm	18%	16%	21%	30%	17%	13%	20%	17%
Early afternoon 2pm – before 4pm	6%	6%	7%	9%	5%	7%	8%	6%
Late afternoon 4pm – before 6pm	8%	8%	9%	11%	6%	11%	7%	8%
Early evening 6pm – before 8pm	35%	34%	35%	28%	31%	46%	41%	45%
Mid evening 8pm – before 10pm	30%	23%	38%	29%	24%	41%	36%	36%
Late evening 10pm onwards	10%	10%	10%	5%	9%	18%	13%	8%

EXHIBIT 8 – AVERAGE WEEKLY HOURS FOR DIFFERENT MEDIA ACTIVITIES, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO CONSUME THE FOLLOWING MEDIA (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
Total Internet TV	9.4	9.3	9.7	8.0	9.4	11.5	8.9	7.2
Accessing news online, on websites or apps	7.9	7.2	8.9	5.8	8.2	8.4	8.4	8.1
Broadcast TV	6.7	6.2	7.2	5.6	6.3	7.1	9.0	6.7
TV snippets or entire shows streamed on YouTube	6.6	6.5	6.6	5.1	6.3	8.8	5.4	6.8
Legal Internet sources of movies and TV programs	6.2	5.9	6.5	5.7	6.2	6.4	6.6	5.4
Watching online videos (excluding TV programs and movies)	6.1	6.4	5.9	6.0	6.4	6.0	5.4	5.0
Accessing the Internet via mobile phone	6.1	5.8	6.3	5.8	6.2	6.2	5.9	5.0
Playing games on a pc, laptop, mobile device or console	5.5	5.7	5.3	4.6	5.6	5.7	7.1	3.6
Accessing the internet via a tablet	5.0	4.9	5.2	5.3	4.1	6.2	7.6	3.9
Illegal (pirated) sources of TV shows or movies downloaded/streamed from the Internet	4.5	4.5	4.6	10.2	3.8	3.4	5.5	2.2
Time-shifted TV	4.1	4.1	4.0	3.0	3.7	5.2	5.1	3.2
Reading a newspaper	3.2	3.0	3.4	2.1	3.2	3.5	3.4	3.1
Listening to the radio	2.7	2.7	2.8	2.5	2.7	3.3	2.3	2.1

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EXHIBIT 9 – DEVICE ACCESS BY TIME OF DAY, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
DESKTOP								
Early morning before 9am	13%	12%	15%	13%	11%	18%	18%	15%
Morning 9am – before 12pm	22%	21%	24%	16%	19%	31%	30%	33%
Lunch time 12pm – before 2pm	16%	18%	15%	15%	15%	23%	16%	17%
Early afternoon 2pm – before 4pm	19%	17%	21%	15%	16%	24%	32%	17%
Late afternoon 4pm – before 6pm	15%	13%	18%	13%	14%	17%	22%	17%
Early evening 6pm – before 8pm	15%	17%	13%	17%	13%	15%	23%	23%
Mid evening 8pm – before 10pm	20%	22%	18%	28%	16%	21%	33%	17%
Late evening 10pm onwards	11%	11%	11%	10%	10%	10%	16%	10%
LAPTOP/NOTEBOOK								
Early morning vefore 9am	18%	20%	16%	18%	20%	15%	17%	9%
Morning 9am – before 12pm	27%	28%	26%	15%	31%	25%	24%	27%
Lunch time 12pm – before 2pm	23%	24%	22%	17%	25%	22%	23%	30%
Early afternoon 2pm – before 4pm	25%	26%	25%	18%	28%	26%	22%	22%
Late afternoon 4pm – before 6pm	26%	29%	21%	16%	30%	23%	17%	26%
Early evening 6pm – before 8pm	31%	33%	30%	29%	36%	26%	21%	30%
Mid evening 8pm – before 10pm	37%	38%	35%	30%	42%	32%	22%	39%
Late evening 10pm onwards	24%	24%	25%	23%	29%	16%	20%	16%

EXHIBIT 9 – DEVICE ACCESS BY TIME OF DAY, SPLIT BY GENDER AND AGE (CONT'D)
BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
MOBILE PHONE								
Early morning Before 9am	15%	14%	16%	19%	13%	19%	10%	17%
Morning 9am – before 12pm	18%	16%	21%	19%	19%	20%	11%	23%
Lunch time 12pm – before 2pm	19%	17%	21%	15%	19%	22%	16%	23%
Early afternoon 2pm – before 4pm	18%	16%	22%	18%	19%	17%	13%	30%
Late afternoon 4pm – before 6pm	17%	15%	19%	18%	16%	15%	19%	25%
Early evening 6pm – before 8pm	17%	16%	17%	20%	16%	15%	15%	23%
Mid evening 8pm – before 10pm	20%	19%	22%	22%	20%	20%	23%	17%
Late evening 10pm onwards	16%	15%	18%	14%	17%	18%	15%	9%
TABLET								
Early morning Before 9am	3%	2%	3%	2%	1%	5%	9%	2%
Morning 9am – before 12pm	3%	3%	4%	3%	2%	5%	8%	4%
Lunch time 12pm – before 2pm	4%	3%	6%	2%	2%	7%	12%	13%
Early afternoon 2pm – before 4pm	3%	4%	3%	1%	3%	4%	7%	6%
Late afternoon 4pm – before 6pm	4%	2%	6%	2%	2%	5%	12%	13%
Early evening 6pm – before 8pm	6%	5%	6%	5%	4%	8%	11%	15%
Mid evening 8pm – before 10pm	5%	5%	4%	4%	2%	8%	13%	6%
Late evening 10pm onwards	4%	4%	5%	5%	3%	7%	8%	2%

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EXHIBIT 9 – DEVICE ACCESS BY TIME OF DAY, SPLIT BY GENDER AND AGE (CONT'D)
BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
CONNECTED TV								
Early morning before 9am	1%	1%	1%	0%	1%	0%	6%	0%
Morning 9am – before 12pm	1%	0%	1%	0%	0%	0%	3%	0%
Lunch time 12pm – before 2pm	1%	1%	1%	0%	1%	1%	5%	0%
Early afternoon 2pm – before 4pm	1%	1%	1%	0%	1%	1%	5%	0%
Late afternoon 4pm – before 6pm	1%	1%	1%	0%	1%	1%	4%	0%
Early evening 6pm – before 8pm	1%	1%	1%	0%	0%	1%	6%	0%
Mid evening 8pm – before 10pm	2%	2%	1%	0%	1%	2%	5%	0%
Late evening 10pm onwards	1%	1%	1%	0%	1%	0%	5%	0%
GAMES CONSOLE								
Early morning before 9am	0%	0%	1%	0%	0%	0%	3%	0%
Morning 9am – before 12pm	0%	0%	1%	0%	0%	0%	3%	0%
Lunch time 12pm – before 2pm	0%	0%	1%	0%	0%	1%	3%	0%
Early afternoon 2pm – before 4pm	0%	0%	1%	0%	0%	1%	3%	0%
Late afternoon 4pm – before 6pm	0%	0%	1%	0%	0%	1%	3%	0%
Early evening 6pm – before 8pm	1%	1%	1%	0%	0%	1%	3%	0%
Mid evening 8pm – before 10pm	1%	0%	1%	0%	0%	0%	3%	0%
Late evening 10pm onwards	1%	1%	1%	0%	1%	0%	3%	0%

EXHIBIT 9 – DEVICE ACCESS BY TIME OF DAY, SPLIT BY GENDER AND AGE (CONT'D)
BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
PORTABLE MEDIA PLAYER								
Early morning before 9am	0%	0%	1%	0%	0%	1%	3%	0%
Morning 9am – before 12pm	0%	0%	1%	0%	0%	0%	3%	0%
Lunch time 12pm – before 2pm	1%	0%	1%	0%	0%	0%	4%	0%
Early afternoon 2pm – before 4pm	0%	0%	1%	0%	0%	0%	3%	0%
Late afternoon 4pm – before 6pm	1%	0%	1%	0%	0%	0%	3%	0%
Early evening 6pm – before 8pm	0%	0%	1%	0%	0%	0%	4%	0%
Mid evening 8pm – before 10pm	1%	1%	1%	0%	1%	0%	3%	0%
Late evening 10pm onwards	0%	0%	1%	0%	0%	0%	4%	0%

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EXHIBIT 10 – ONLINE ACTIVITIES BY TIME OF DAY, SPLIT BY GENDER AND AGE
BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
SOCIAL MEDIA								
Early morning before 9am	24%	23%	24%	31%	23%	23%	24%	12%
Morning 9am – before 12pm	31%	30%	32%	25%	34%	26%	31%	23%
Lunch time 12pm – before 2pm	31%	31%	31%	30%	31%	36%	29%	21%
Early afternoon 2pm – before 4pm	30%	28%	32%	30%	33%	26%	23%	13%
Late afternoon 4pm – before 6pm	30%	31%	29%	33%	31%	30%	27%	21%
Early evening 6pm – before 8pm	37%	38%	35%	37%	37%	34%	35%	42%
Mid evening 8pm – before 10pm	42%	42%	42%	41%	45%	41%	33%	24%
Late evening 10pm onwards	28%	26%	31%	29%	29%	26%	26%	16%
ONLINE NEWS								
Early morning before 9am	22%	21%	22%	26%	20%	28%	17%	22%
Morning 9am – before 12pm	31%	31%	32%	27%	30%	33%	37%	43%
Lunch time 12pm – before 2pm	26%	24%	27%	27%	25%	28%	23%	28%
Early afternoon 2pm – before 4pm	28%	29%	28%	26%	28%	33%	25%	26%
Late afternoon 4pm – before 6pm	23%	25%	22%	25%	23%	23%	23%	26%
Early evening 6pm – before 8pm	27%	28%	26%	27%	28%	24%	25%	29%
Mid evening 8pm – before 10pm	32%	33%	30%	31%	34%	30%	29%	15%
Late evening 10pm onwards	19%	19%	19%	18%	20%	19%	18%	17%

EXHIBIT 10 – ONLINE ACTIVITIES BY TIME OF DAY, SPLIT BY GENDER AND AGE (CONT'D)
BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
ONLINE VIDEO (INCLUDING INTERNET TV)								
Early morning before 9am	12%	13%	11%	11%	13%	8%	17%	8%
Morning 9am – before 12pm	28%	29%	26%	25%	30%	24%	23%	32%
Lunch time 12pm – before 2pm	31%	32%	31%	25%	31%	39%	29%	27%
Early afternoon 2pm – before 4pm	21%	19%	23%	23%	22%	17%	18%	21%
Late afternoon 4pm – before 6pm	20%	19%	22%	21%	20%	18%	28%	20%
Early evening 6pm – before 8pm	30%	30%	29%	34%	28%	26%	36%	42%
Mid evening 8pm – before 10pm	42%	45%	37%	38%	42%	44%	39%	38%
Late evening 10pm onwards	23%	22%	24%	17%	25%	24%	21%	17%
ONLINE SHOPPING								
Early morning before 9am	8%	9%	7%	8%	7%	10%	10%	6%
Morning 9am – before 12pm	18%	18%	19%	10%	19%	23%	19%	18%
Lunch time 12pm – before 2pm	18%	17%	19%	8%	19%	22%	24%	18%
Early afternoon 2pm – before 4pm	17%	16%	17%	14%	16%	18%	24%	12%
Late afternoon 4pm – before 6pm	19%	18%	20%	20%	18%	21%	17%	15%
Early evening 6pm – before 8pm	22%	23%	21%	20%	22%	21%	25%	18%
Mid evening 8pm – before 10pm	25%	24%	27%	23%	25%	25%	23%	40%
Late evening 10pm onwards	14%	14%	13%	13%	15%	11%	12%	6%

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EXHIBIT 11 – SOURCES OF TV AND VIDEO CONTENT, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
Broadcast TV	79%	78%	81%	78%	75%	88%	88%	90%
TV/movie snippets or entire shows streamed on sites like YouTube	48%	47%	48%	42%	53%	44%	37%	38%
Legal (non pirated) Internet sources or video on demand services	35%	37%	33%	29%	37%	34%	36%	36%
Time-shifted TV	16%	14%	18%	13%	15%	16%	23%	15%
Illegal (pirated sources) such as BitTorrent, Usenet etc.	10%	11%	8%	7%	11%	8%	12%	4%
Combined Internet TV	67%	68%	67%	64%	72%	60%	60%	64%

EXHIBIT 12 – INTERNET TV TENURE, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO CONSUME INTERNET TV (N=707 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	707	403	304	81	426	121	57	22
Less than one year	7%	7%	8%	14%	8%	2%	5%	6%
About 1–2 years	21%	24%	17%	39%	18%	18%	13%	22%
About 2–4 years	35%	31%	39%	24%	39%	27%	37%	33%
More than 4 years (i.e. since before 2010)	38%	38%	36%	23%	36%	52%	46%	39%

EXHIBIT 13 – INTERNET TV FREQUENCY, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO CONSUME INTERNET TV (N=707 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	707	403	304	81	426	121	57	22
Daily	49%	49%	49%	38%	51%	57%	36%	47%
About every other day	27%	27%	26%	27%	27%	26%	30%	23%
A few times each week	20%	20%	20%	31%	18%	14%	29%	30%
About once a week	2%	2%	2%	1%	2%	1%	6%	0%
About once every 2 weeks	1%	0%	1%	0%	1%	1%	0%	0%
About once a month	1%	0%	1%	0%	1%	0%	0%	0%
Less often than once a month	0%	1%	0%	3%	0%	0%	0%	0%

EXHIBIT 14 – INTERNET TV SOURCES, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO CONSUME INTERNET TV (N=707 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	707	403	304	81	426	121	57	22
YouTube	96%	96%	96%	91%	96%	98%	94%	96%
Facebook	71%	67%	78%	75%	76%	63%	66%	41%
nhaccuatui.com	46%	46%	45%	39%	47%	45%	48%	45%
clip.vn	45%	45%	44%	41%	43%	53%	43%	45%
Twitter	12%	12%	12%	7%	12%	16%	17%	9%
Other illegal source	8%	10%	5%	8%	8%	7%	7%	13%
MySapce	7%	7%	6%	0%	6%	11%	18%	0%

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EXHIBIT 15 – INTERNET TV PROGRAM GENRES, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO CONSUME INTERNET TV (N=707 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	707	403	304	81	426	121	57	22
Movies	94%	95%	93%	89%	95%	97%	91%	87%
Entertainment	92%	89%	97%	91%	95%	88%	89%	83%
Music shows/ music videos	91%	88%	95%	94%	92%	90%	84%	75%
News/current affairs from local TV networks	81%	80%	82%	79%	83%	77%	81%	75%
Lifestyle	80%	75%	86%	75%	83%	79%	75%	68%
Local sport, available on local TV	80%	83%	76%	78%	82%	76%	73%	86%
Overseas sport not easily accessible to local audiences on TV	77%	80%	73%	70%	80%	79%	75%	59%
News/current affairs from overseas TV networks	74%	72%	76%	73%	76%	74%	67%	61%
Documentaries	73%	71%	76%	65%	77%	70%	74%	63%
Local drama series	68%	67%	70%	62%	71%	66%	69%	49%
Overseas drama series	68%	66%	71%	63%	71%	67%	67%	44%
Children's programs	29%	23%	36%	15%	26%	39%	49%	36%

EXHIBIT 16 – INTERNET TV - FULL LENGTH PROGRAM GENRES, SPLIT BY GENDER AND AGE
BASE: ONLINE CONSUMERS 16+ WHO CONSUME INTERNET TV (N=707 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	707	403	304	81	426	121	57	22
Movies	83%	85%	80%	78%	85%	85%	72%	71%
Entertainment	74%	68%	82%	79%	76%	68%	67%	71%
Music shows/ music videos	62%	60%	65%	71%	66%	52%	47%	50%
Lifestyle	48%	37%	61%	41%	50%	42%	52%	48%
News/current affairs from local TV networks	38%	39%	36%	24%	37%	44%	51%	46%
Overseas sport not easily accessible to local audiences on TV	37%	46%	25%	33%	35%	43%	38%	37%
Local sport, available on local TV	34%	44%	20%	33%	32%	40%	36%	31%
Documentaries	33%	35%	30%	24%	35%	33%	26%	40%
Children's programs	29%	23%	36%	15%	26%	39%	49%	36%
Local drama series	24%	24%	23%	23%	23%	28%	26%	14%
Overseas drama series	22%	24%	21%	22%	22%	24%	22%	20%
News/current affairs from overseas TV networks	22%	22%	22%	26%	17%	33%	31%	15%

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EXHIBIT 17 – INTERNET TV - SEGMENT, HIGHLIGHTS OR SNIPPET GENRES, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO CONSUME INTERNET TV (N=707 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	707	403	304	81	426	121	57	22
News/current affairs from overseas TV networks	55%	53%	58%	48%	62%	46%	40%	46%
Local sport, available on local TV	51%	45%	58%	46%	54%	43%	41%	65%
Children's programs	49%	51%	46%	49%	53%	44%	41%	20%
News/current affairs from local TV networks	48%	47%	50%	59%	51%	42%	33%	39%
Overseas drama series	48%	44%	53%	43%	51%	47%	46%	24%
Local drama series	48%	46%	50%	39%	53%	41%	44%	35%
Documentaries	45%	43%	49%	41%	47%	42%	52%	34%
Overseas sport not easily accessible to local audiences on TV	44%	39%	50%	38%	48%	42%	42%	22%
Lifestyle	41%	46%	34%	36%	42%	46%	34%	36%
Music shows/ music videos	39%	39%	39%	32%	36%	53%	49%	25%
Entertainment	29%	32%	26%	16%	29%	35%	41%	33%
Movies	25%	26%	24%	26%	22%	30%	34%	26%

EXHIBIT 18 – INTERNET TV DEVICE, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO CONSUME INTERNET TV (N=707 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	707	403	304	81	426	121	57	22
Laptop/desktop	92%	92%	93%	86%	94%	93%	89%	97%
Mobile phone	49%	49%	49%	44%	48%	60%	46%	41%
TV screen	44%	44%	45%	42%	40%	51%	58%	57%
Tablet	27%	27%	28%	26%	22%	38%	50%	32%
Portable media player/handheld games device	3%	3%	4%	3%	2%	6%	7%	0%

EXHIBIT 19 – INTERNET TV VIEWING LOCATION, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO CONSUME INTERNET TV (N=707 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	707	403	304	81	426	121	57	22
At home in the living room	71%	73%	69%	69%	68%	77%	80%	86%
At home in a room other than the living room	50%	42%	59%	44%	50%	52%	51%	39%
Friend/ relative's home	38%	36%	39%	38%	42%	30%	31%	15%
In an Internet café	36%	37%	35%	36%	37%	39%	24%	32%
At work/school/ university etc.	23%	21%	26%	40%	25%	9%	15%	9%
While travelling/on holiday, in hotel, airport, on flight, in car etc.	17%	16%	19%	12%	16%	24%	22%	20%
While commuting/ on bus, train, ferry, tram, car	17%	17%	17%	14%	15%	15%	36%	15%
In a public place (e.g. beach, park)	15%	15%	14%	11%	15%	10%	23%	12%

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EXHIBIT 20 – INTERNET TV BARRIERS, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO DO NOT CONSUME INTERNET TV (N=293 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	293	143	150	40	124	64	33	32
My Internet connection is too slow	32%	32%	32%	48%	30%	31%	23%	21%
There are too many ads	24%	25%	23%	27%	26%	19%	22%	21%
I don't want to watch TV via a computer, tablet or mobile phone	17%	17%	18%	16%	16%	21%	16%	25%
My Internet access costs would increase	15%	15%	15%	16%	13%	25%	5%	5%
It's difficult to find the programs/movies I want to watch online	14%	16%	12%	12%	16%	14%	18%	7%
The services are too expensive	14%	14%	14%	17%	14%	16%	7%	10%
I didn't know I could	13%	15%	10%	20%	11%	10%	20%	5%
I have no need to, traditional TV is sufficient	13%	11%	15%	6%	12%	22%	5%	16%
I have no interest in Internet TV	12%	12%	13%	19%	13%	11%	9%	0%
I'm not sure what TV shows/ movies are on there	7%	8%	6%	5%	9%	7%	4%	5%
I don't know how to do it	7%	7%	6%	11%	6%	5%	6%	7%
I don't know where to go to stream or download these shows	7%	9%	3%	4%	10%	0%	5%	14%
I've tried it in the past	6%	6%	6%	9%	6%	5%	6%	5%
I don't know who provides it	5%	6%	4%	5%	8%	2%	5%	0%
There are not enough TV shows/movies available on these services	4%	3%	5%	4%	6%	3%	2%	5%
I have no interest in watching TV programs at all	4%	2%	6%	6%	5%	0%	5%	0%
It's too difficult/cumbersome to set up and do	4%	4%	3%	0%	5%	4%	2%	0%
I don't have the right devices/technology/ connections etc.	3%	3%	2%	4%	2%	2%	0%	11%
It's illegal	0%	0%	0%	0%	0%	1%	0%	0%

EXHIBIT 21 – TRADITIONAL AND ONLINE TV VIEWING BY TIME OF DAY, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
TOTAL TV (TRADITIONAL + INTERNET TV)								
Early morning before 9am	22%	20%	23%	15%	21%	21%	34%	31%
Morning 9am – before 12pm	24%	26%	21%	23%	25%	21%	24%	27%
Lunch time 12pm – before 2pm	28%	27%	29%	38%	27%	25%	26%	23%
Early afternoon 2pm – before 4pm	12%	12%	13%	16%	12%	13%	12%	6%
Late afternoon 4pm – before 6pm	14%	14%	14%	16%	12%	16%	17%	11%
Early evening 6pm – before 8pm	42%	42%	43%	41%	40%	51%	45%	45%
Mid evening 8pm – before 10pm	42%	37%	49%	41%	39%	51%	44%	47%
Late evening 10pm onwards	18%	18%	18%	8%	19%	23%	20%	16%
WATCHING TRADITIONAL TV								
Early morning before 9am	13%	16%	21%	10%	16%	19%	32%	29%
Morning 9am – before 12pm	14%	16%	12%	17%	13%	14%	17%	21%
Lunch time 12pm – before 2pm	18%	16%	21%	30%	17%	13%	20%	17%
Early afternoon 2pm – before 4pm	6%	6%	7%	9%	5%	7%	8%	6%
Late afternoon 4pm – before 6pm	8%	8%	9%	11%	6%	11%	7%	8%
Early evening 6pm – before 8pm	35%	34%	35%	28%	31%	46%	41%	45%
Mid evening 8pm – before 10pm	30%	23%	38%	29%	24%	41%	36%	36%
Late evening 10pm onwards	10%	10%	10%	5%	9%	18%	13%	8%

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EXHIBIT 21 – TRADITIONAL AND ONLINE TV VIEWING BY TIME OF DAY, SPLIT BY GENDER AND AGE (CONT'D)

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
ONLINE VIDEO (INCLUDING INTERNET TV)								
Early morning before 9am	12%	13%	11%	11%	13%	8%	17%	8%
Morning 9am – before 12pm	28%	29%	26%	25%	30%	24%	23%	32%
Lunch time 12pm – before 2pm	31%	32%	31%	25%	31%	39%	29%	27%
Early afternoon 2pm – before 4pm	21%	19%	23%	23%	22%	17%	18%	21%
Late afternoon 4pm – before 6pm	20%	19%	22%	21%	20%	18%	28%	20%
Early evening 6pm – before 8pm	30%	30%	29%	34%	28%	26%	36%	42%
Mid evening 8pm – before 10pm	42%	45%	37%	38%	42%	44%	39%	38%
Late evening 10pm onwards	23%	22%	24%	17%	25%	24%	21%	17%
ONLINE VIDEO (EXCLUDING INTERNET TV)								
Early morning before 9am	9%	9%	8%	8%	9%	6%	11%	8%
Morning 9am – before 12pm	20%	21%	18%	22%	20%	19%	16%	29%
Lunch time 12pm – before 2pm	23%	24%	23%	19%	23%	28%	24%	19%
Early afternoon 2pm – before 4pm	17%	15%	19%	18%	18%	13%	14%	21%
Late afternoon 4pm – before 6pm	16%	14%	18%	18%	16%	14%	19%	13%
Early evening 6pm – before 8pm	23%	24%	22%	25%	22%	21%	26%	35%
Mid evening 8pm – before 10pm	33%	37%	28%	29%	34%	37%	28%	25%
Late evening 10pm onwards	18%	18%	18%	15%	19%	21%	14%	14%

EXHIBIT 21 – TRADITIONAL AND ONLINE TV VIEWING BY TIME OF DAY, SPLIT BY GENDER AND AGE (CONT'D)

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
INTERNET TV								
Early morning before 9am	5%	5%	5%	6%	5%	3%	10%	2%
Morning 9am – before 12pm	12%	12%	12%	7%	15%	9%	10%	6%
Lunch time 12pm – before 2pm	11%	12%	10%	9%	12%	14%	10%	8%
Early afternoon 2pm – before 4pm	7%	7%	7%	6%	8%	7%	8%	0%
Late afternoon 4pm – before 6pm	7%	8%	7%	6%	7%	6%	13%	7%
Early evening 6pm – before 8pm	12%	13%	12%	14%	12%	12%	16%	7%
Mid evening 8pm – before 10pm	19%	19%	18%	17%	19%	17%	20%	20%
Late evening 10pm onwards	11%	11%	10%	4%	12%	11%	10%	10%

EXHIBIT 22 – WATCHING ONLINE VIDEO, SPLIT BY AGE AND GENDER

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
Past 12 months	98%	98%	98%	98%	99%	97%	98%	100%
Monthly or more often	96%	97%	96%	96%	97%	94%	96%	98%
Weekly or more often	91%	93%	89%	94%	93%	88%	79%	89%

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EXHIBIT 23 – FREQUENCY OF DOWNLOADING /STREAMING VIDEO, SPLIT BY GENDER AND AGE
BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
DOWNLOADING VIDEO								
Daily/multiple times daily	27%	30%	22%	19%	30%	23%	22%	31%
Weekly or a few times each week	38%	40%	35%	43%	37%	42%	29%	32%
About fortnightly or monthly	17%	15%	20%	16%	16%	17%	28%	24%
Less often than monthly, but I've done this in the past 12 months	12%	9%	15%	16%	10%	11%	15%	7%
I've done this but not in the past 12 months	2%	2%	3%	0%	3%	4%	2%	2%
I have never done this	4%	4%	4%	7%	3%	4%	4%	4%
STREAMING VIDEO								
Daily/multiple times daily	60%	61%	58%	59%	64%	54%	45%	57%
Weekly or a few times each week	26%	24%	27%	27%	23%	29%	32%	23%
About fortnightly or monthly	9%	9%	8%	6%	8%	8%	17%	13%
Less often than monthly, but I've done this in the past 12 months	4%	3%	4%	6%	2%	5%	4%	6%
I've done this but not in the past 12 months	2%	2%	1%	1%	2%	3%	1%	2%
I have never done this	1%	1%	1%	2%	1%	1%	1%	0%

EXHIBIT 24 – ONLINE VIDEO SOURCES, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO DOWNLOAD/STREAM CONTENT (N=1,052 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,052	598	454	135	594	194	92	37
YouTube	90%	89%	90%	90%	91%	88%	86%	83%
24h.com.vn	60%	66%	52%	46%	62%	62%	62%	62%
nhaccuatui.com	46%	45%	49%	45%	48%	47%	40%	47%
vnexpress.net	42%	43%	41%	26%	37%	61%	50%	54%
dantri.com.vn	40%	41%	39%	22%	41%	50%	44%	31%
kenh14.vn	38%	31%	47%	37%	44%	30%	23%	36%
clip.vn	37%	36%	37%	31%	38%	37%	34%	37%
vietnamnet.vn	24%	25%	23%	12%	22%	32%	38%	24%
soha.vn	18%	16%	21%	19%	18%	18%	18%	24%
laodong.com.vn	11%	12%	11%	5%	10%	16%	18%	22%
doisongphapluat.com	11%	11%	11%	6%	9%	17%	16%	15%
nguoiduatin.vn	7%	6%	8%	3%	5%	8%	17%	12%

EXHIBIT 25 – DEVICE USED FOR ONLINE VIDEO, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
Mobile phone	39%	41%	37%	33%	37%	47%	48%	43%
Tablet	15%	15%	15%	10%	12%	23%	23%	16%

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EXHIBIT 26 – INTERNET TV LANGUAGE VIEWED, SPLIT BY GENDER AND AGE
BASE: ONLINE CONSUMERS 16+ WHO CONSUME INTERNET TV (N=707 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	707	403	304	81	426	121	57	22
Vietnamese	84%	84%	84%	82%	81%	89%	93%	87%
English	46%	51%	41%	38%	50%	45%	37%	37%
Other language	2%	2%	3%	1%	3%	1%	6%	3%

EXHIBIT 27 – DUAL SCREENING FEQUENCY IN 2014, SPLIT BY GENDER AND AGE
BASE: ONLINE CONSUMERS 16+ WHO DUAL SCREEN (N=1,026 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,026	583	443	130	578	195	89	34
Daily	64%	65%	63%	65%	64%	65%	58%	69%
Almost every day	18%	16%	19%	16%	18%	18%	16%	23%
Several times per week	12%	13%	11%	12%	11%	13%	17%	5%
Once per week	2%	3%	1%	0%	3%	1%	2%	0%
Once or twice per month	2%	2%	1%	3%	1%	1%	6%	0%
Less often	3%	2%	5%	3%	4%	2%	2%	4%

EXHIBIT 28 – DUAL SCREENING ACTIVITIES, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO DUAL SCREEN (N=1,026 IN 2014)

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,026	583	443	130	578	195	89	34
TV AND ENTERTAINMENT CONTENT								
Access content related to TV program	95%	97%	92%	93%	95%	92%	98%	96%
Access other entertainment content (unrelated)	95%	96%	94%	95%	95%	95%	97%	94%
SHOPPING								
Search/browse/buy products or services-advertised during TV program	88%	89%	87%	80%	89%	88%	95%	85%
Search/browse/buy products or services – in general (unrelated)	87%	89%	84%	80%	86%	90%	94%	86%
COMMUNICATION								
Write posts, read messages or communicate online – related to TV program	87%	87%	86%	87%	86%	85%	91%	94%
Write posts, read messages or communicate online (unrelated)	90%	90%	90%	90%	90%	92%	93%	84%

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EXHIBIT 29 – DUAL SCREENING PROGRAM GENRES, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO DUAL SCREEN (N=1,026 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,026	583	443	130	578	195	89	34
Movies	75%	73%	77%	74%	76%	74%	76%	55%
Music shows	48%	44%	53%	53%	51%	43%	39%	31%
Sport	44%	61%	23%	35%	44%	50%	50%	44%
Sitcoms/comedy	44%	47%	41%	47%	46%	42%	38%	26%
Reality TV shows	43%	38%	51%	46%	42%	45%	47%	36%
Live performance shows (e.g XFactor)	38%	34%	43%	28%	41%	41%	27%	32%
News/current affairs/ panel discussion shows	31%	29%	33%	26%	27%	37%	46%	37%
TV show/movie viewed via an Internet source	29%	26%	31%	34%	31%	23%	23%	15%
Ads	26%	23%	30%	18%	28%	32%	20%	19%
Children's shows/ cartoons	21%	17%	26%	19%	18%	25%	29%	25%
Quiz shows	19%	18%	19%	22%	17%	21%	20%	19%
Documentaries	16%	19%	13%	17%	15%	20%	19%	6%
Recorded TV show/movie	13%	12%	13%	13%	12%	13%	17%	13%
Drama	12%	12%	12%	11%	12%	12%	15%	14%

EXHIBIT 30 – DUAL SCREENING BY DEVICE, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO DUAL SCREEN (N=1,026 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,026	583	443	130	578	195	89	34
USE REGULARLY								
Mobile phone	86%	85%	87%	88%	86%	87%	86%	72%
Laptop/notebook	83%	83%	83%	76%	87%	82%	80%	67%
Desktop PC	75%	77%	73%	79%	73%	76%	79%	85%
Tablet computer (e.g. iPad)	51%	54%	48%	51%	50%	57%	51%	38%
TV (Internet enabled)	45%	47%	43%	52%	44%	43%	49%	49%
Games console	38%	40%	35%	39%	38%	37%	42%	24%
Portable media player (i.e. iPod Touch)	37%	38%	35%	39%	37%	37%	37%	21%
USE MOST OFTEN								
Desktop PC	25%	28%	22%	24%	24%	28%	31%	30%
Laptop/notebook	42%	42%	41%	39%	47%	38%	26%	29%
Mobile phone	22%	19%	27%	26%	20%	25%	24%	28%
Tablet computer (e.g. iPad)	5%	5%	4%	6%	4%	4%	10%	2%
Games console	2%	1%	2%	0%	2%	2%	1%	4%
TV (Internet enabled)	1%	2%	1%	2%	1%	1%	2%	2%
Portable media player (i.e. iPod Touch)	1%	1%	2%	2%	1%	2%	0%	0%

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EXHIBIT 31 – TRIPLE SCREEN FREQUENCY, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO DUAL SCREEN (N=1,026 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,026	583	443	130	578	195	89	34
USE REGULARLY								
Daily	40%	41%	39%	46%	39%	43%	34%	46%
Almost every day	21%	20%	22%	14%	21%	22%	31%	16%
Several times per week	17%	18%	17%	20%	18%	15%	15%	12%
Once per week	4%	4%	3%	6%	4%	2%	2%	4%
Once or twice per month	2%	1%	2%	1%	2%	2%	3%	0%
Less often	4%	4%	3%	4%	4%	4%	2%	2%
Never triple screened	12%	12%	13%	8%	12%	12%	14%	20%

EXHIBIT 32 – SOCIAL TV ACTIVITIES, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
READING OTHER PEOPLE'S COMMENTS ABOUT TV PROGRAMS AS YOU ARE WATCHING/WATCHED RECENTLY								
Past 12 months	91%	91%	92%	84%	93%	90%	88%	98%
Weekly or more often	62%	61%	63%	54%	65%	65%	51%	60%
INTERACTING WITH OTHERS/POSTING COMMENTS ABOUT TV PROGRAMS AS YOU ARE WATCHING/ WATCHED RECENTLY								
past 12 months	87%	90%	82%	83%	88%	90%	83%	84%
Weekly or more often	57%	62%	50%	43%	60%	64%	50%	52%

EXHIBIT 32 – SOCIAL TV ACTIVITIES, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,062	537	525	231	390	257	126	58
READING OTHER PEOPLE'S COMMENTS ABOUT TV PROGRAMS AS YOU ARE WATCHING/WATCHED RECENTLY								
Daily/multiple times daily	35%	33%	37%	33%	38%	36%	25%	15%
Weekly or a few times each week	27%	28%	26%	21%	27%	29%	26%	45%
About fortnightly or monthly	18%	19%	17%	20%	17%	15%	21%	24%
Less often than monthly, but I've done this in the past 12 months	11%	11%	11%	10%	11%	9%	15%	14%
I've done this but not in the past 12 months	5%	5%	4%	11%	3%	8%	1%	2%
I have never done this	4%	4%	4%	5%	4%	3%	11%	0%
INTERACTING WITH OTHERS/POSTING COMMENTS ABOUT TV PROGRAMS AS YOU ARE WATCHING/ WATCHED RECENTLY								
Daily/multiple times daily	27%	29%	24%	21%	29%	32%	18%	14%
Weekly or a few times each week	30%	33%	26%	22%	31%	31%	32%	39%
About fortnightly or monthly	17%	18%	17%	25%	16%	13%	19%	24%
Less often than monthly, but I've done this in the past 12 months	13%	11%	15%	16%	12%	12%	14%	8%
I've done this but not in the past 12 months	5%	3%	7%	4%	5%	4%	6%	6%
I have never done this	9%	7%	11%	13%	8%	6%	12%	10%

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EXHIBIT 33 – PREFERRED MODEL FOR ONLINE VIDEO ACCESS, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO DOWNLOAD/STREAM CONTENT (N=1,053 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,053	599	454	135	594	195	92	37
Prefer to pay to access online video content with limited or no advertising	22%	23%	20%	20%	19%	24%	34%	22%
Prefer to access free online video content that includes advertising	65%	63%	68%	63%	68%	61%	56%	70%
Undecided/ it depends	13%	14%	12%	16%	13%	15%	10%	7%

EXHIBIT 34 – ONLINE VIDEO AD RECALL, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO DOWNLOAD/STREAM CONTENT (N=1,052 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,052	598	454	135	594	194	92	37
Automotive	45%	54%	34%	39%	43%	51%	54%	48%
Beverages	45%	41%	50%	45%	47%	43%	48%	27%
Travel, hotels and resorts	44%	42%	46%	37%	46%	44%	37%	52%
Food and food products	43%	38%	50%	44%	45%	43%	35%	38%
Toiletries and cosmetics	42%	33%	53%	46%	42%	37%	43%	37%
Clothing stores	41%	36%	46%	44%	44%	32%	34%	37%
Consumer electronics and video stores	38%	41%	34%	35%	40%	34%	32%	50%
Communications/ telecommunications	37%	44%	29%	42%	39%	30%	40%	25%
Leisure time activities and events	34%	31%	38%	35%	36%	26%	34%	34%
Confectionery and snack	33%	28%	39%	36%	34%	30%	32%	25%
Food stores and supermarkets	32%	27%	38%	28%	36%	24%	28%	38%
Discount department stores	30%	26%	35%	28%	31%	30%	28%	27%
Insurance	26%	26%	26%	11%	24%	34%	41%	26%
Schools, colleges and camps	24%	23%	24%	29%	24%	17%	26%	22%
Restaurants	23%	21%	25%	14%	24%	24%	27%	30%
Media and advertising	23%	22%	25%	18%	27%	16%	22%	15%
Motion pictures	23%	21%	25%	24%	24%	18%	24%	17%
Home centers and hardware stores	22%	23%	21%	21%	23%	20%	19%	22%
Furniture stores	21%	24%	18%	19%	21%	20%	28%	18%
Financial	21%	23%	18%	12%	21%	29%	21%	20%
Car and truck dealers	18%	19%	18%	19%	18%	19%	18%	24%
Building materials, equipment and fixtures	16%	18%	14%	14%	16%	15%	21%	23%
Political	10%	12%	6%	8%	10%	9%	8%	4%
Legal services	9%	8%	10%	3%	9%	8%	16%	11%
Government and organisations	6%	6%	5%	5%	6%	5%	7%	8%

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EXHIBIT 35 – INTERNET SEARCH AS A RESULT OF SEEING A VIDEO AD ON PC VS. MOBILE DEVICE, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ WHO DOWNLOAD/STREAM CONTENT (N=1,052 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,052	598	454	135	594	194	92	37
DESKTOP/LAPTOP								
Never	11%	12%	11%	14%	10%	12%	13%	20%
Once	13%	14%	11%	14%	14%	11%	11%	10%
2–3 times in the past	23%	21%	26%	20%	23%	25%	26%	22%
4 or more times in the past	51%	51%	50%	50%	51%	52%	47%	48%
I don't access the Internet on this type of device	2%	2%	3%	3%	2%	1%	3%	0%
MOBILE DEVICE								
Never	26%	23%	29%	24%	29%	18%	24%	26%
Once	17%	16%	18%	18%	16%	20%	23%	10%
2–3 times in the past	23%	23%	24%	23%	24%	23%	22%	22%
4 or more times in the past	28%	32%	22%	28%	25%	34%	30%	28%
I don't access the Internet on this type of device	6%	6%	6%	8%	6%	5%	2%	15%

EXHIBIT 36 – PURCHASED AN ITEM AS A RESULT OF SEEING A VIDEO AD ON PC VS. MOBILE DEVICE, SPLIT BY GENDER AND AGE

BACK

BASE: ONLINE CONSUMERS 16+ WHO DOWNLOAD/STREAM CONTENT (N=1,052 IN 2014)

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,052	598	454	135	594	194	92	37
DESKTOP/LAPTOP								
Never	23%	21%	24%	30%	23%	14%	27%	24%
Once	20%	19%	20%	21%	20%	19%	19%	18%
2–3 times in the past	28%	29%	26%	18%	27%	33%	29%	38%
4 or more times in the past	29%	29%	28%	29%	29%	32%	24%	20%
I don't access the Internet on this type of device	2%	1%	2%	3%	1%	2%	1%	0%
MOBILE DEVICE								
Never	35%	32%	40%	39%	36%	27%	40%	40%
Once	17%	16%	19%	12%	18%	19%	18%	21%
2–3 times in the past	20%	20%	19%	17%	18%	25%	27%	12%
4 or more times in the past	22%	25%	18%	24%	22%	27%	14%	15%
I don't access the Internet on this type of device	5%	6%	4%	7%	6%	3%	1%	12%

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EXHIBIT 37 – DEGREE TO WHICH RELEVANT ADS MAKE YOU FEEL MORE FAVOURABLE TOWARD THE BRAND, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
1	3%	4%	3%	8%	3%	1%	2%	0%
2	3%	3%	2%	4%	2%	4%	3%	0%
3	5%	7%	4%	8%	6%	4%	4%	0%
4	6%	6%	7%	4%	8%	4%	4%	9%
5	16%	17%	15%	17%	16%	16%	15%	16%
6	14%	13%	15%	15%	13%	14%	8%	23%
7	20%	20%	19%	17%	18%	26%	18%	27%
8	21%	20%	21%	18%	20%	22%	31%	8%
9	7%	5%	8%	4%	7%	7%	7%	4%
10	6%	6%	6%	4%	6%	4%	7%	12%

EXHIBIT 38 – AD RELEVANCE/IMPACT BY PLACEMENT, SPLIT BY GENDER AND AGE

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
WHERE CONNECTED CONSUMERS SEE THE MOST RELEVANT ADS								
On TV	38%	34%	43%	25%	37%	46%	53%	31%
Online video ads when using a PC	21%	21%	20%	20%	23%	17%	18%	13%
Online banner ads when using a PC	17%	20%	12%	18%	18%	12%	12%	19%
In printed newspapers or magazines	8%	8%	9%	12%	7%	6%	8%	17%
On billboards/ bus stops/train stations etc.	8%	7%	9%	15%	7%	7%	4%	6%
Online video ads when using a mobile device	5%	5%	4%	6%	4%	4%	4%	4%
Online banner ads when using a mobile device	4%	4%	3%	4%	3%	7%	1%	9%
ADS THAT HAVE THE GREATEST IMPACT/INFLUENCE ON PURCHASE								
TV ads	45%	42%	49%	37%	43%	51%	62%	44%
Online video ads when using a PC	19%	19%	18%	19%	22%	16%	9%	10%
Online banner ads when using a PC	15%	17%	12%	16%	15%	15%	10%	20%
In printed newspapers or magazines	11%	11%	11%	16%	9%	9%	10%	19%
Online video ads when using a mobile device	5%	5%	4%	4%	5%	4%	5%	5%
On billboards/ bus stops/train stations etc.	3%	3%	4%	4%	3%	3%	4%	2%
Online banner ads when using a mobile device	3%	3%	2%	3%	3%	2%	1%	0%

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EXHIBIT 39 – VIDEO CONTENT SHARING (POSTING, UPLOADING AND SHARING VIDEO CLIPS)

BASE: ONLINE CONSUMERS 16+ (N=1,069 IN 2014)

BACK

	TOTAL	MALE	FEMALE	16–20 YEARS	21–29 YEARS	30–39 YEARS	40–49 YEARS	50+ YEARS
BASE	1,069	606	463	139	599	199	95	37
Past 12 months	86%	89%	83%	82%	89%	89%	78%	79%
Monthly or more often	67%	70%	63%	54%	72%	68%	58%	58%
Weekly or more often	50%	54%	46%	44%	54%	50%	38%	45%

ABOUT OUR AUTHORS

NANCY JAFFE
DIRECTOR,
SOUTHEAST ASIA
CROSS-PLATFORM
AUDIENCE MEASUREMENT
NIELSEN

MELANIE INGREY
RESEARCH DIRECTOR,
CROSS-PLATFORM
CUSTOM INSIGHTS
SOUTHEAST ASIA, NORTH
ASIA, AND THE PACIFIC
NIELSEN

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