The State of the User Experience – South East Asia

2017 EDITION

The State of the User Experience – South East Asia is part of Limelight Networks’ series of annual surveys that explores consumer perceptions and behaviors around online activities.
# Table of Contents

**Executive Summary** ............................................................ 4  
**Key Findings** ................................................................. 5  
  Filipinos spend the most time online followed second by Malaysians .................................................. 5  
  Social media is the most dominant activity followed closely by watching online video ......................... 6  
  The smartphone is the dominant device through which to access the Internet ........................................ 8  
  Social media is used for a variety of activities when shopping online, but is most popular to find out what friends and family think about a product .......................... 9  
  Consumers expect websites to load and operate quickly regardless of the device used to access them .................................................................................................................. 10  
  Most consumers will often abandon a site that loads slowly and move to a competitor’s site to buy a product .................................................................................................................. 11  
  Consumers are willing to retry web experiences that don’t perform well the first time ............................ 12  
  Consumers rank “fresh and updated content” as the top expectation for website experiences ................ 12  
  Consumers want personalized website experiences ................................................................................. 13  
  Positive web experiences translate to positive brand impact when shopping online .............................. 14  
**Millennials Section** .............................................................. 15  
  Millennials spend less time online .............................................................................................................. 15  
  Millennials spend more time on social media and watching online video ............................................. 16  
  Millennials are more often likely to recommend a website to a friend based on a positive experience . 17  
**Conclusion** ............................................................................. 18  
**Footnotes** ............................................................................... 19  
**Methodology** .......................................................................... 19  
**About Limelight Networks** ..................................................... 19
# Table of Contents

## FIGURES

| Figure 1 | How much time do you spend online each week, outside of work? | 5 |
| Figure 2 | How do you spend the majority of your time online? | 6 |
| Figure 3 | How do you spend the majority of your time online? (All Countries) | 7 |
| Figure 4 | Which type of device do you use to access websites? | 8 |
| Figure 5 | Which type of device do you use to access websites? (Thailand) | 8 |
| Figure 6 | How do you use social media while shopping online? | 9 |
| Figure 7 | How do you use social media while shopping online? (Singapore) | 9 |
| Figure 8 | Are you willing to wait longer for a page to load on a mobile device (Smartphone or Tablet) or on a laptop or desktop computer? | 10 |
| Figure 9 | When you shop online do you leave a page and buy the product from a competitor if you have to wait too long for the page to load? | 11 |
| Figure 10 | When you shop online do you leave a page and buy the product from a competitor if you have to wait too long for the page to load? (Philippines) | 11 |
| Figure 11 | If a website loads slowly would you give it another try in the future? | 12 |
| Figure 12 | What do you expect from a website experience? | 12 |
| Figure 13 | Do you want a website to remember that you’ve come there before, and make recommendations based on your previous visit? | 13 |
| Figure 14 | Do you want a website to remember that you’ve come there before, and make recommendations based on your previous visit? (Singapore) | 13 |
| Figure 15 | Are you likely to recommend a brand to a friend if you had a positive experience with its website? | 14 |
| Figure 16 | How much time do you spend online each week, outside of work? (Millenials) | 15 |
| Figure 17 | How much time do you spend online each week, outside of work? (Everyone else) | 15 |
| Figure 18 | How do you spend the majority of your time online? | 16 |
| Figure 19 | Are you likely to recommend a brand to a friend if you had a positive experience with its website? | 17 |
The State of the User Experience – South East Asia

Executive Summary

Across the South East Asian (SEA) region (Malaysia, Singapore, Thailand, and the Philippines), consumers are spending a considerable amount of time online outside of work. Almost 50 percent of respondents indicated that they spend more than 16 hours online. Surprisingly, the older demographics spend the most time online.

Regardless of the time spent online, consumers are doing so primarily via their smartphones. Across the region, and even more pointedly amongst Millennials, consumers are using smaller screens to access digital experiences putting increased pressure on organizations to build those experiences with a “mobile first” mindset.

The online shopping behavior of SEA consumers is largely the same—many employ social media while shopping to find out what friends and family think of products they plan to purchase, most will leave a poorly performing site to purchase elsewhere, and the majority want fresh, updated content and fast-performing web experiences regardless of the device they are employing to access the Web. Of course, there are discrepancies amongst different countries. For example, Singaporeans tend to use social networking sites to find coupons while shopping online, and Filipinos are far more forgiving of poorly performing website experiences.

What these discrepancies tell us is that organizations cannot take a “one-size-fits-all” approach to the digital experiences they provide. The majority of consumers across the region favor a personalized web experience, and that means not only tailoring content to individual shoppers, but to entire countries. Failing to take into account a specific country’s predilection and behavior for a digital experience could seriously damage a brand’s reputation and impact revenue.

Regardless of the differences between individual countries, there are specific activities that all organizations should take when addressing SEA consumers, such as building for mobile first, optimizing digital experiences to improve performance, and creating personalized offerings.

The opportunities within the region to offer consumers a positive web and brand experience are significant. To capitalize on them, organizations of all sizes must address not only the holistic behaviors, but the country-specific as well.
Key Findings

- Filipinos spend the most time online, followed by Malaysians
- When it comes to spending time online, social media is the most dominant activity followed closely by watching online video
- The smartphone is the dominant device through which consumers access the Internet
- Social media is used for a variety of activities when shopping online, but is most popular to find out what friends and family think about a product
- Consumers expect websites to load and operate quickly regardless of the device used to access them
- Most consumers will often abandon a site that loads slowly and switch to a competitor’s site to make a purchase
- Consumers rank "fresh and updated content" as the top expectation for website experiences
- Consumers want personalized website experiences
- In South East Asia, positive web experiences translate to positive brand impact

Filipinos spend the most time online followed second by Malaysians

As illustrated in Figure 1, Filipinos (47%) and Malaysians (42%) spend the most time online (16 or more hours per week). This is a clear indication to organization delivering digital content in the region that they need to maintain a high quality digital presence in these countries.
Social media is the most dominant activity followed closely by watching online video.

However, in looking at the individual scores for each of the regions (Figures 3-6), it becomes clear that there are some critical distinctions.
When comparing activities, Filipinos spend the most time on social networks while Thais spend the most time watching online video.

**Figure 3:** How do you spend the majority of your time online? (All Countries)
The smartphone is the dominant device through which to access the Internet

As illustrated in Figure 4, the dominant device by which consumers across South East Asia access the Internet is their smartphone. What’s interesting though is the secondary device.

For most consumers in the region, the primary device used to access websites is the laptop computer except in Thailand where it is the desktop computer (Figure 5). Although it is unclear why consumers in Thailand would differ from their South East Asian counterparts with regards to the second-most used device for accessing the Internet, the analysis is clear—mobile rules.
Social media is used for a variety of activities when shopping online, but is most popular to find out what friends and family think about a product

Social media has become an important part of the online shopping experience as consumers employ different networks for a variety of activities ranging from engaging with sales associates to posting pictures and videos of products.

As depicted in Figure 6, there is a dominant activity across the region—finding out what friends and family think about a product (34%).

There are exceptions. For instance, Figure 7 shows that in Singapore, the majority of consumers (24%) employ social media to find online coupons while shopping, rather than seeking the advice of friends and family (19%).

Figure 6: How do you use social media while shopping online?

Figure 7: How do you use social media while shopping online? (Singapore)
Consumers expect websites to load and operate quickly regardless of the device used to access them

Consumers in the region expect that website performance will be equal across all the devices they employ to access the Internet (Figure 8). However, more consumers (73%) expect access to be faster on a mobile device rather than a desktop or laptop computer. This parallels the dominance of the smartphone to access the Internet in the region (Figure 4).

**Figure 8:** Are you willing to wait longer for a page to load on a mobile device (Smartphone or Tablet) or on a laptop or desktop computer?
Most consumers will often abandon a site that loads slowly and move to a competitor’s site to buy a product

It’s an online retailer’s biggest fear—consumers fleeing a website because of technical issues. But it’s not only technical issues that will cause them to abandon a website experience. According to our data (Figure 9), the majority of consumers (43%) will abandon a website, and buy from a competitor, if the experience is too slow.

![Figure 9: When you shop online do you leave a page and buy the product from a competitor if you have to wait too long for the page to load?](image)

There are exceptions. As illustrated in Figure 10, the Filipinos (44%) were the least likely to indicate that they wouldn’t abandon a site to purchase from somewhere else. However a significant number will still switch to a competitor’s site to make a purchase when frustrated by wait times. It is clear, regardless of the country, that website operators cannot afford to have their web experiences load slowly or perform poorly as it can impact the bottom-line.

![Figure 10: When you shop online do you leave a page and buy the product from a competitor if you have to wait too long for the page to load? (Philippines)](image)
Consumers are willing to retry web experiences that don't perform well the first time

![Figure 11: If a website loads slowly would you give it another try in the future?](image)

Despite consumer penchant for abandoning a slowly performing website to purchase a product from a competitor (Figure 9), they are forgiving as indicated in Figure 11. The majority of consumers (77%) said they would return to a slowly performing website to give it another chance.

Consumers rank “fresh and updated content” as the top expectation for website experiences

![Figure 12: What do you expect from a website experience?](image)

Although consumers in this study have demonstrated the importance of website performance, Figure 12 indicates that performance comes in second to “fresh and updated” content when asked what is most important in a website experience (46% versus 38%). It is interesting to speculate how this data might impact some of the other responses. For example, if a website’s content was the same as a previous visit, would that impact consumer willingness to retry the website in the event that it performed poorly?
Consumers want personalized website experiences

Figure 13: Do you want a website to remember that you’ve come there before, and make recommendations based on your previous visit?

<table>
<thead>
<tr>
<th></th>
<th>I don’t care</th>
<th>I don’t know</th>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>10%</td>
<td>6%</td>
<td>17%</td>
<td>67%</td>
</tr>
</tbody>
</table>

Figure 14: Do you want a website to remember that you’ve come there before, and make recommendations based on your previous visit? (Singapore)

<table>
<thead>
<tr>
<th></th>
<th>I don’t care</th>
<th>I don’t know</th>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>14%</td>
<td>9%</td>
<td>24%</td>
<td>53%</td>
</tr>
</tbody>
</table>

Together with a consumer predilection for “fresh and updated” content (Figure 12), Figure 13 illustrates that consumers want a personalized web experience. And although this sentiment is shared across the region, Singapore (Figure 14) clearly has less of a desire for this kind of experience than their South East Asian counterparts.
Positive web experiences translate to positive brand impact

What does it mean to have a “positive” web experience? For South East Asian consumers that likely means a fast-performing website (especially on a smartphone) with personalized and fresh content. And when that happens? As illustrated in Figure 15, it translates to positive brand affirmation—consumers are willing to share a brand recommendation with a friend when they’ve had a positive experience on a website.

**Figure 15:** Are you likely to recommend a brand to a friend if you had a positive experience with its website?

What does it mean to have a “positive” web experience? For South East Asian consumers that likely means a fast-performing website (especially on a smartphone) with personalized and fresh content. And when that happens? As illustrated in Figure 15, it translates to positive brand affirmation—consumers are willing to share a brand recommendation with a friend when they’ve had a positive experience on a website.
Millennials Section

- Millennials spend less time online than other demographics.
- When they are online, Millennials spend more time on social media and watching online video.
- In the Philippines and Malaysia, Millennials are more tolerant of poorly-performing websites than those in Thailand or Singapore.
- Millennials are more often likely to recommend a website to a friend based on a positive experience.

Millennials spend less time online

<table>
<thead>
<tr>
<th>Country</th>
<th>% Spending 16 Hours or More</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philippines</td>
<td>39%</td>
</tr>
<tr>
<td>Thailand</td>
<td>34%</td>
</tr>
<tr>
<td>Singapore</td>
<td>39%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>42%</td>
</tr>
</tbody>
</table>

**Figure 16:** How much time do you spend online each week, outside of work? (Millennials)

<table>
<thead>
<tr>
<th>Country</th>
<th>% Spending 16 Hours or More</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philippines</td>
<td>56%</td>
</tr>
<tr>
<td>Thailand</td>
<td>42%</td>
</tr>
<tr>
<td>Singapore</td>
<td>32%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>43%</td>
</tr>
</tbody>
</table>

**Figure 17:** How much time do you spend online each week, outside of work? (Everyone else)

With the exception of Singapore—39 percent of Millennials spend 16 or more hours online each week versus 32 percent of other demographics—Millennials are spending less time online than other consumers.
Millennials spend more time on social media and watching online video

Despite spending less time online in general, Millennials spend more time across a variety of activities than do other demographics (Figure 18).

As depicted in Figure 18, Millennials spend more time in every online activity apart from reading news. Watching video content and online gaming demonstrates the largest gap between Millennials and other demographics, illustrating their proclivity for online entertainment.
Millennials are more often likely to recommend a website to a friend based on a positive experience

![Bar chart showing the percentage of people likely to recommend a brand to a friend based on a positive website experience.](chart.png)

**Figure 19:** Are you likely to recommend a brand to a friend if you had a positive experience with its website?

Millennials are just as open to recommending a brand to a friend when they have had a positive web experience (Figure 23) as their demographic counterparts.
Conclusion

What does all this data mean to you? We have identified four guidelines for organizations seeking to capture South East Asian consumer attention with web experiences:

- Build for mobile first
- Create personalized experiences
- Ensure optimal performance by using a CDN
- Keep your website updated

Build for mobile first

It is clear that consumers in South East Asia are using smartphones as the primary means by which to access the Internet. Because of this, organizations can’t build complex websites meant for display on desktop browsers. They must optimize the experience for “mobile first,” and desktop/laptop secondarily.

Create personalized experiences

A “one-size-fits-all” approach to digital experiences isn’t recommended in South East Asia. Organizations must create a personalized experience if they hope to appeal to the region’s consumers. But as indicated in the data, personalization may not be something most desired in every country (i.e., Singapore). It is increasingly important to create web experiences that take into account consumer location when offering advanced functionality such as personalization.

Ensure optimal performance by using a CDN

Although consumers across the region showed a penchant for patience when it came to website experiences, one piece of data clearly indicating that there’s a consequence for poorly-performing websites—consumers will abandon it in favor of a faster competitor’s site. In order to avoid these costly performance problems, it’s critical to utilize technologies such as a CDN to accelerate website performance so that consumers have no reason to abandon a website.

Keep your website updated

The key to a successful web site is generating repeat visits. No organization wants consumers to come only a few times. But in order to garner loyalty, give consumers the website experience they want—one that includes fresh and updated content. Failing to keep a website updated will clearly result in abandonment.
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Footnotes

1 For the purpose of this report, Millennials are aged 18-34 and when graphs indicate a “Millennials” or “Everyone Else,” the numbers represent an average across the entire South East Asia region covered in this report (Malaysia, Singapore, Thailand, and Philippines).

Methodology

This report is based on a survey conducted by a third party company with a sample size of 1,600 consumers chosen at random in Malaysia, Thailand, Singapore and Philippines. Based on the sample size, the confidence interval is approximately 2.8 with a 95 percent confidence level or 3.7 with a 99 percent confidence level.

About Limelight Networks

Limelight Networks Inc., (NASDAQ: LLNW), a global leader in digital content delivery, empowers customers to better engage online audiences by enabling them to securely manage and globally deliver digital content, on any device. The company’s award winning Limelight Orchestrate™ platform includes an integrated suite of content delivery technology and services that helps organizations secure digital content, deliver exceptional multi-screen experiences, improve brand awareness, drive revenue, and enhance customer relationships — all while reducing costs. For more information, please visit www.limelight.com, read our blog, follow us on Twitter, Facebook and LinkedIn and be sure to visit Limelight Connect.