

# *The Changing Filipino Internet User Profile*

JUNE 2, 2014  
FREE WEBINAR  
7 PM

#phnet20



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2005

# Friendster

- Estimated to be used by 5 million Internet users.
- 39% of site traffic is in the Philippines.



**Friendster is the fun and safe way to organize your social life**

**New to Friendster?**

Join now - it's free and takes less than a minute to sign up.

[Join Now](#)

**Already a member?**

email

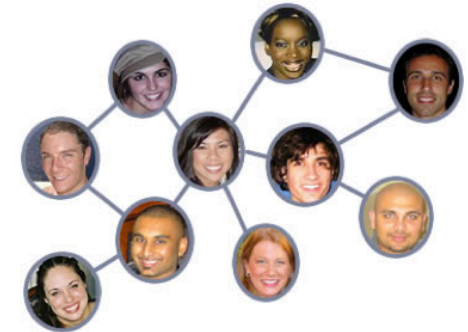
password

remember my email

[Log In](#)

[Forgot your password?](#)

[Problems logging in?](#)



**Find out why more than 13 million people have joined Friendster, the FREE online service to:**

- Stay in touch with your friends
- Find and reconnect with old friends
- See how your friends are connected
- Be reminded about friends' birthdays
- Meet new people through your friends
- Have fun browsing people who share similar interests

[Learn More >>](#)

2007

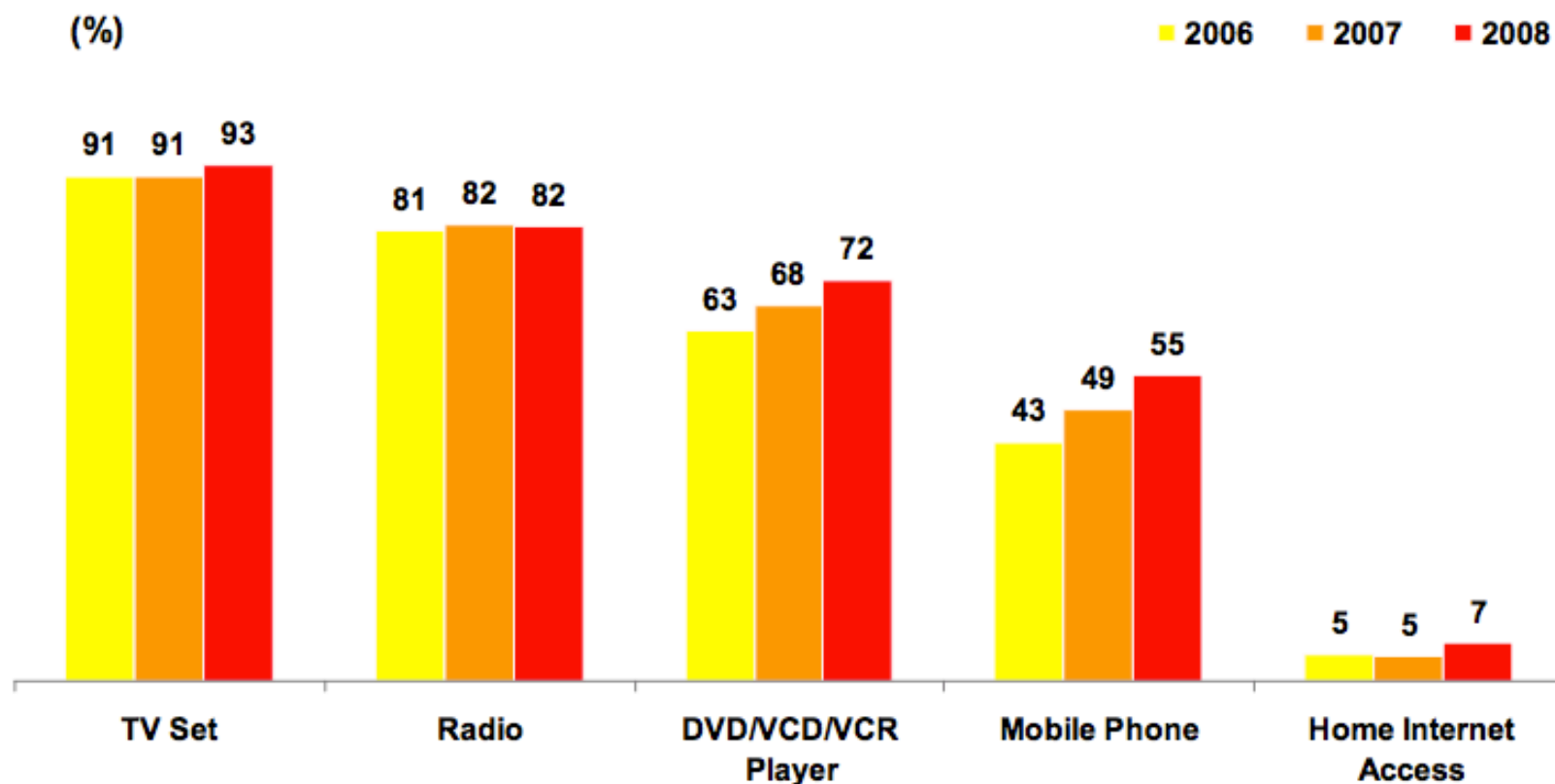
# Young Filipino Internet User Study

- 38% of respondents cited that research is still the primary reason why they go online. For the first time in 7 years of survey activities by DigitalFilipino.com, we've seen social networking and gaming as 2nd and 3rd reasons that motivates young Internet users to go online.
- 375 Internet users from Metro Manila and nearby provinces were randomly surveyed, face-to-face, from March to June 2007 to come up with this report. 89% of respondents are below 25 years old and mostly found in Internet cafes.

2009



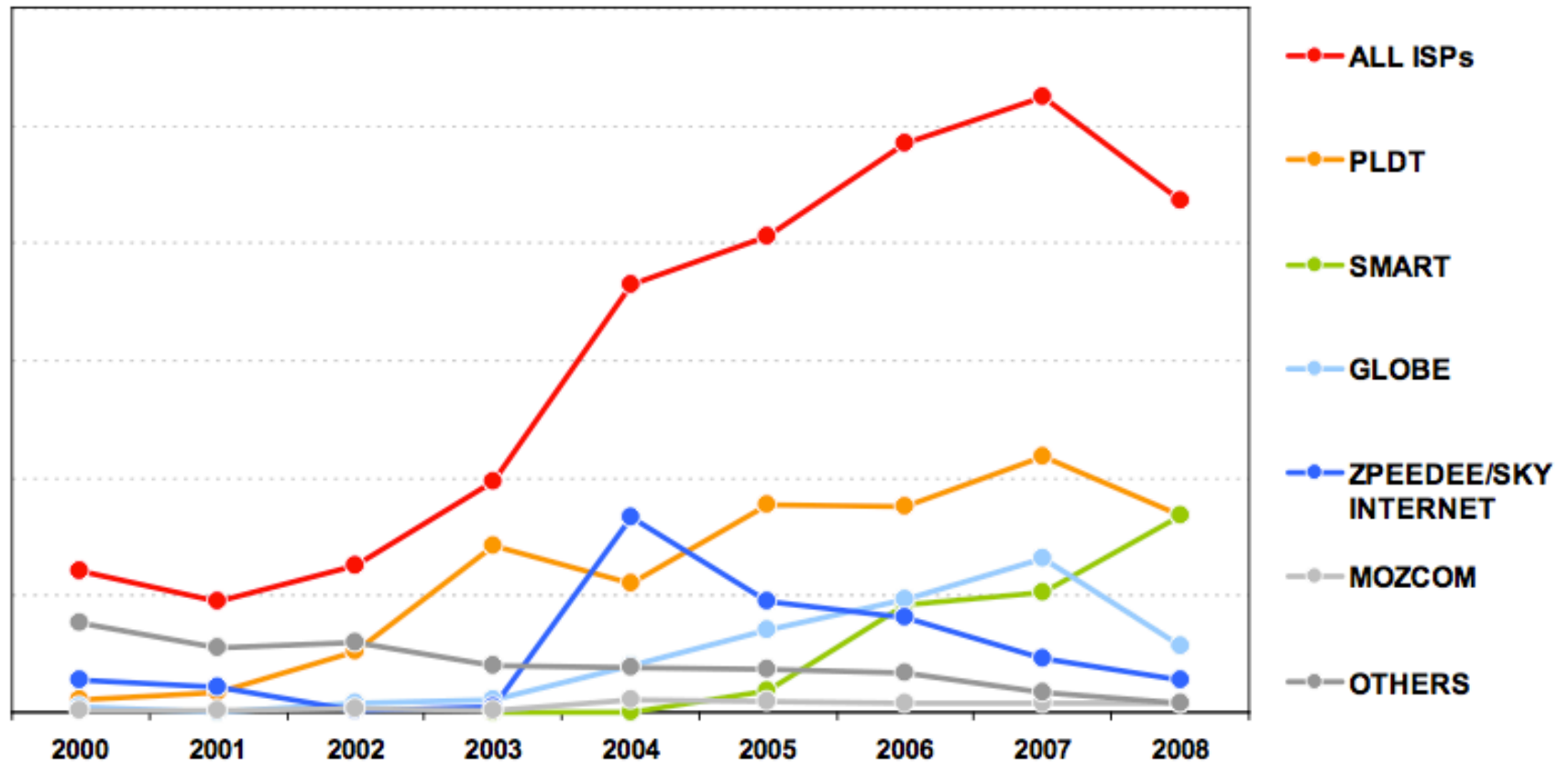
## Media Access/Device Ownership





## ... driving surge in internet take-up

Adspend (Million Pesos)

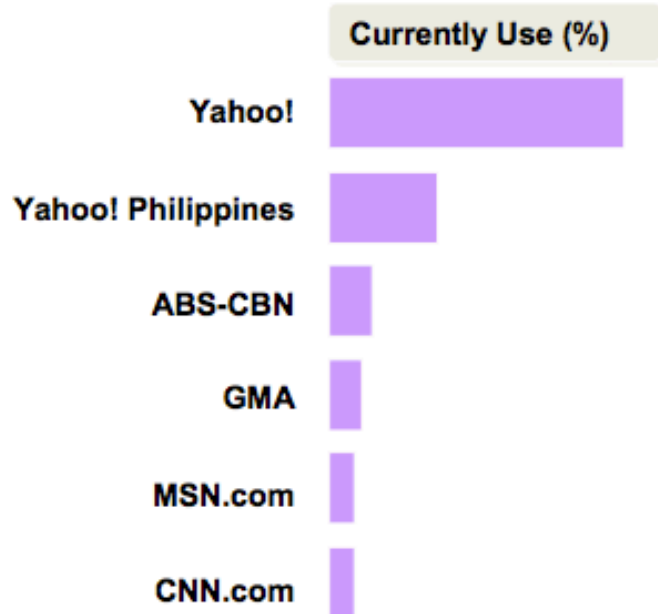




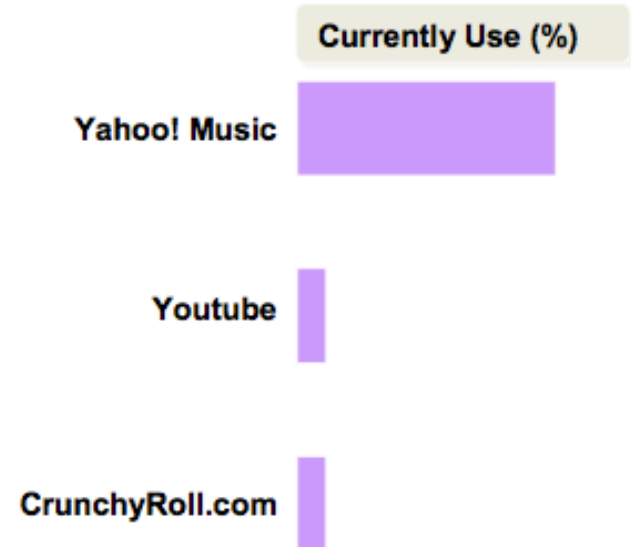


# Popular News and Music Sites

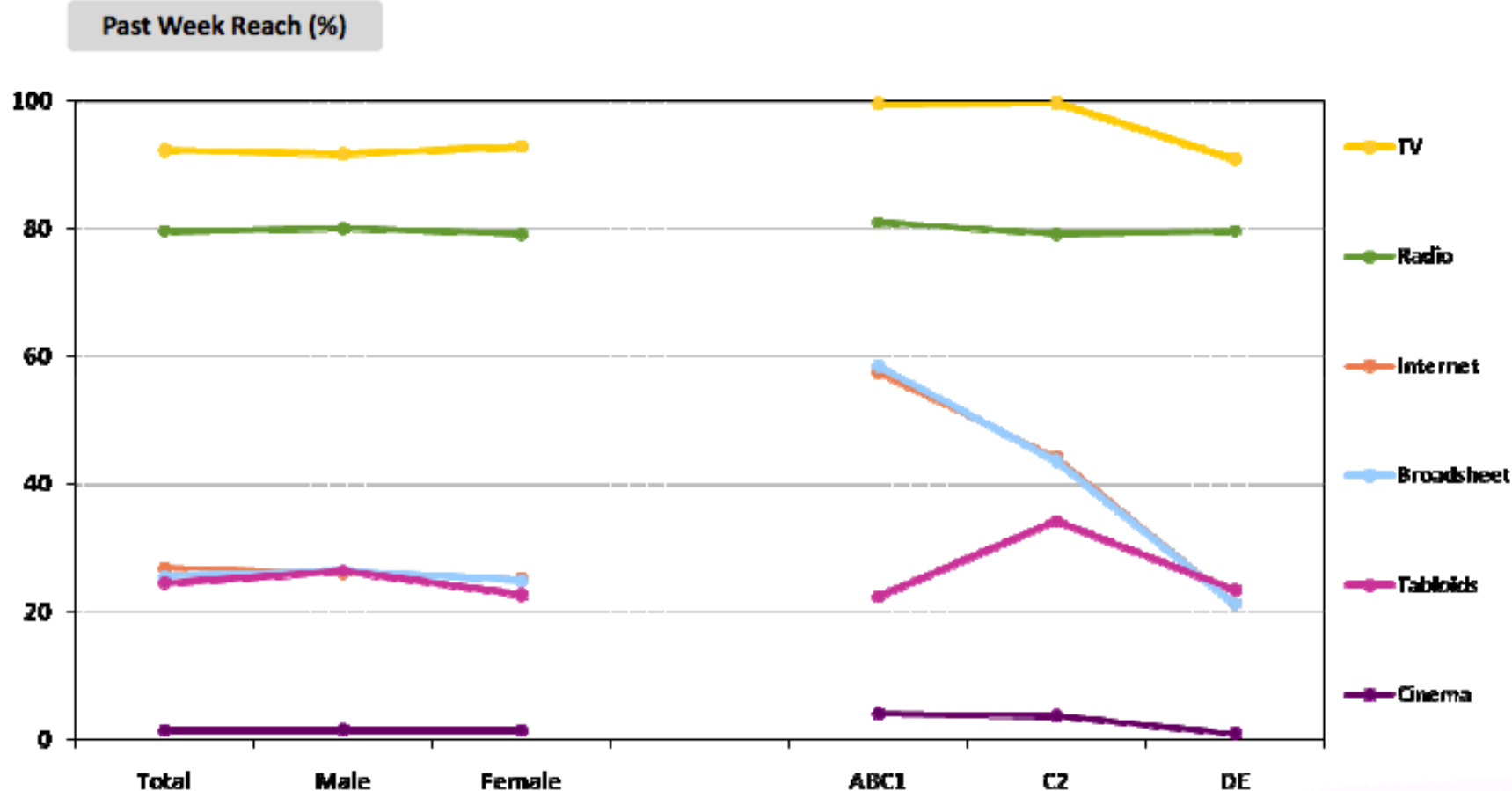
## News Sites



## Music Sites



# Internet - strong affinity with the upscale...

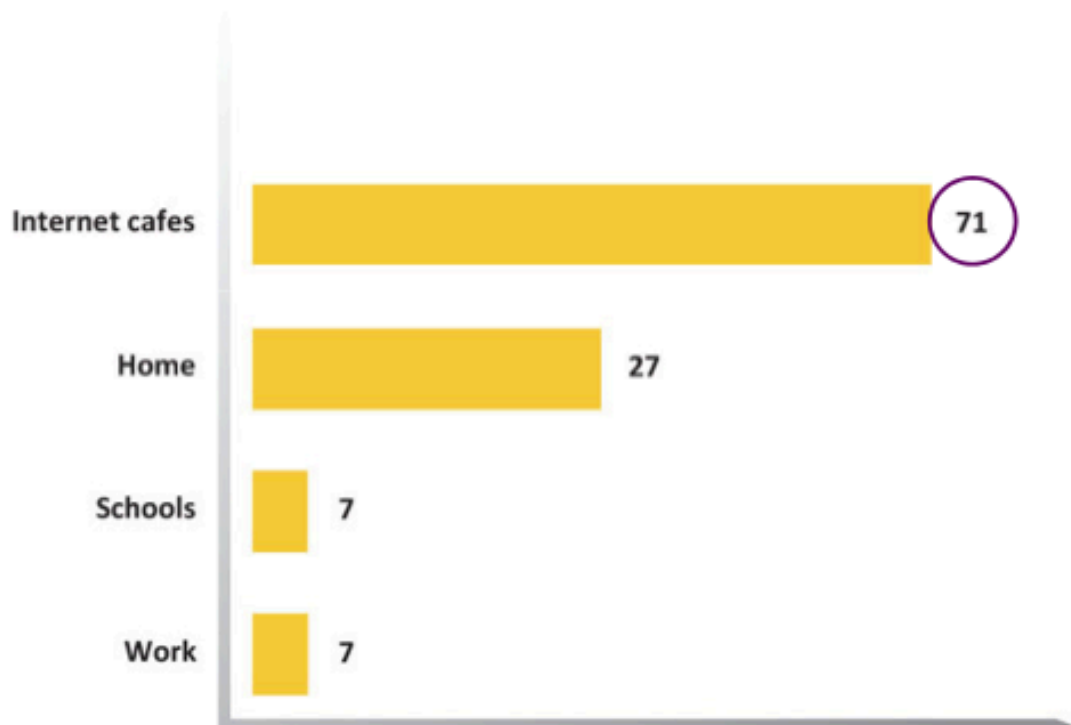


Base: Males and Females aged 10+ across all socio-economic classes in National Urban Philippines  
Source: Nielsen Media Index 2009

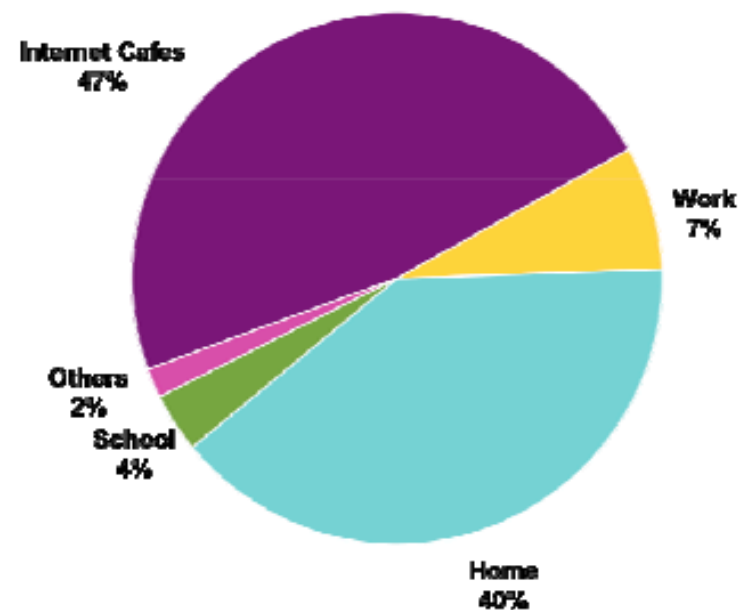


# Internet cafes – the dominant place of access

Place of Access - Past 3 Months (%)

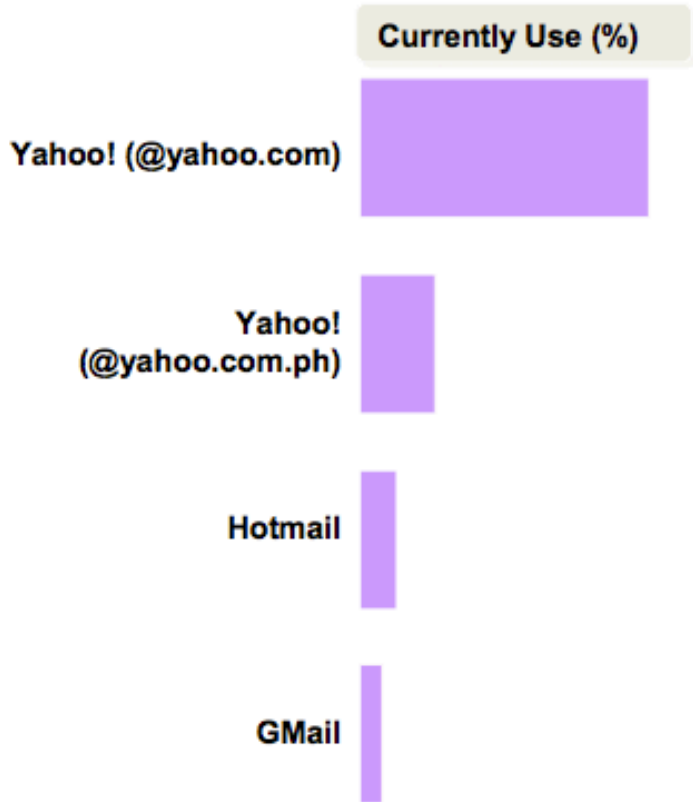


Share of Internet Hours

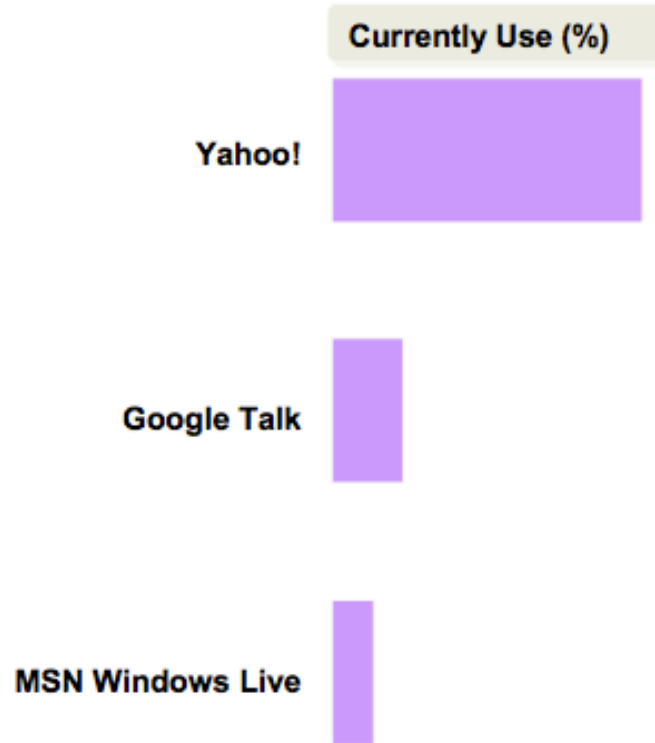




## Web-based Email

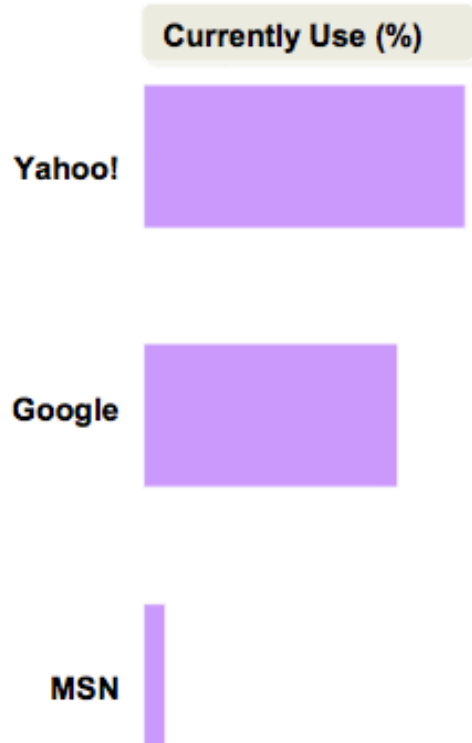


## Instant Messengers





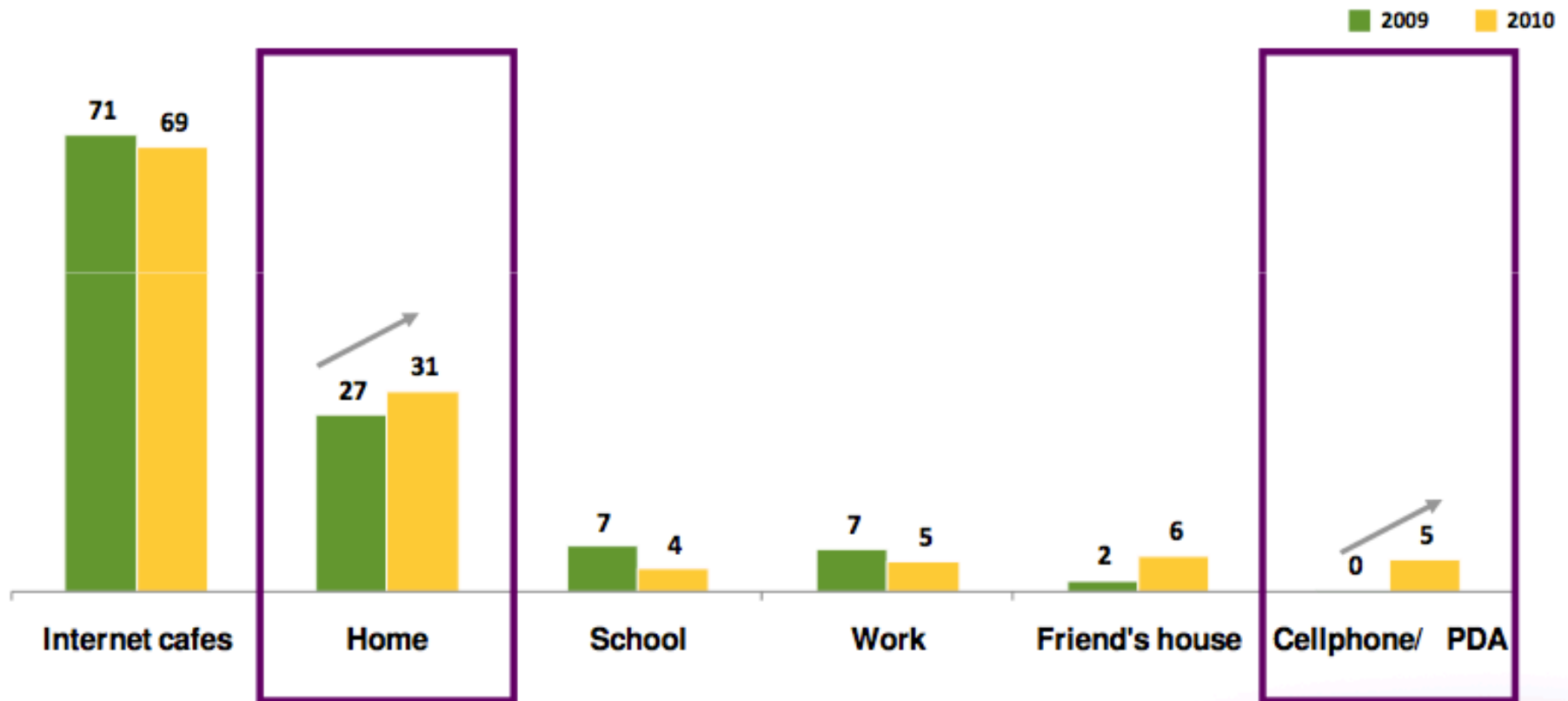
# Search Engines



2010


# From shared to private access

Place of Internet access - P3M (%)



# Core online activities remain unchanged but preferences are evolving...

Select Monthly Online Activities (%)	2009	2010*	
Search	58	76	↑
Internet Portal	54	73	↑
Instant messaging	63	68	
Visiting public chat rooms	54	67	↑
Email	63	65	
Visiting Social Networking sites	-	53	
Played games online	53	45	↓
Downloaded or uploaded music files online	25	37	↑
Used a webcam/made a video conferencing call on internet	33	36	
Watched TV programs or video clips online	22	36	↑
Sent internet SMS	23	34	↑
Visited website where you find knowledge contributed others	19	30	↑
Visiting UGC Sites	-	30	
Shared/posted something online that you created yourself	15	24	↑
Listen to internet radio	28	20	↓

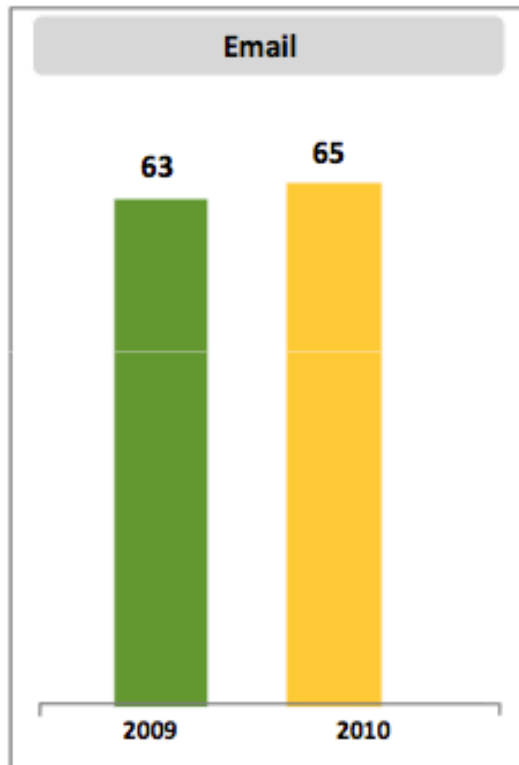
 Activities showing significant increase at 95% confidence levels  
 Base: Past month Internet users aged 10+ across National Urban Philippines  
 Source: Yahoo!-Nielsen Net Index 2010





# Even more prevalent than core communication activities

Past Month Usage (%)



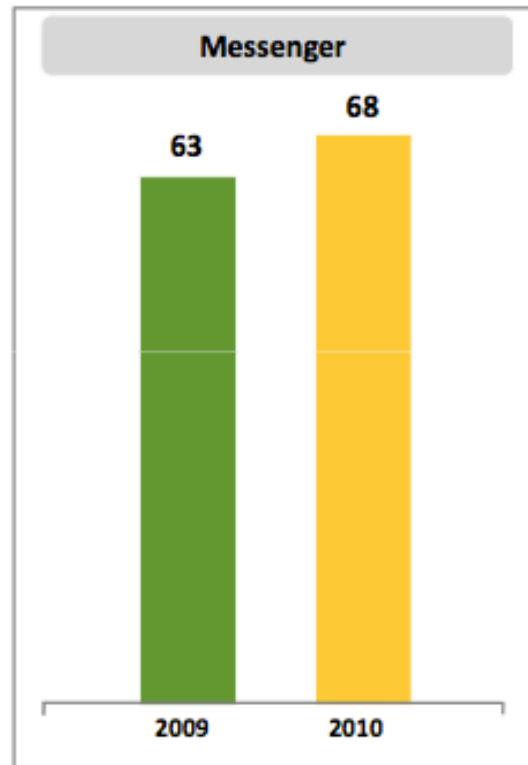
2009

2010

Rank

2

3

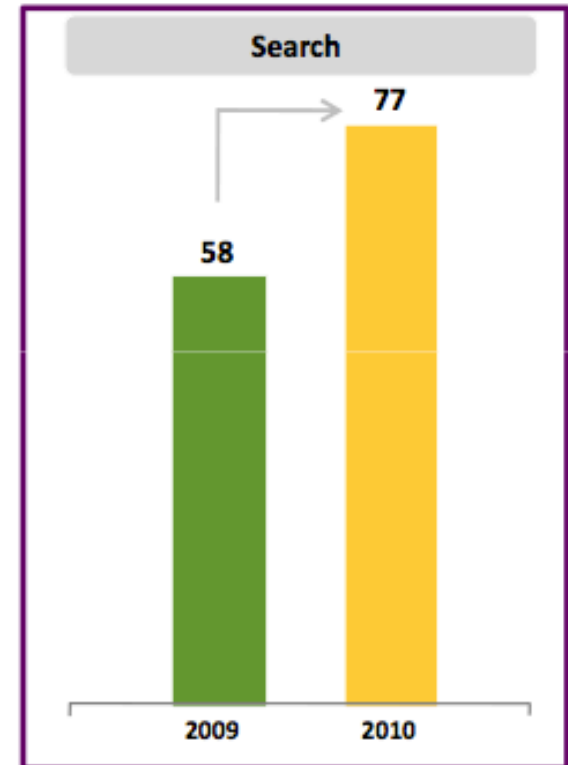


2009

2010

1

2



2009

2010

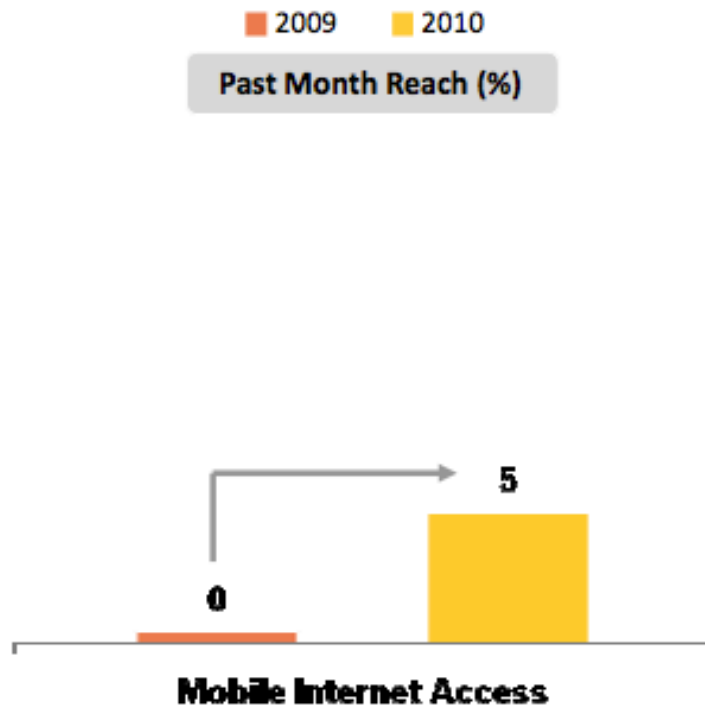
3

1

Base: Past month Internet users aged 10+ across National Urban Philippines  
Source: Yahoo!-Nielsen Net Index 2010



# Attractive tariffs driving internet access through Mobile phones



**SUPER SURF**  
*Walang Metro!*  
*No worries on your bill.*

Call 730-1000

Prepaid P2000/ month | Prepaid P20/ month

Globe All You Can. | Globe

**SurFUNLIMITED!**  
*on ALL the SITES you want!*

Now, you can surf all you want on 3G! All using your mobile phone. Choose from these packages:

3G 1hr | 3G 2hrs | 3G 4hrs

It's fast, just go to the nearest 3G spot! Surf on your mobile phone and stream to your PC and laptop for free.

Unlimited use, just \$3.97 to get to 3G site.

Globe

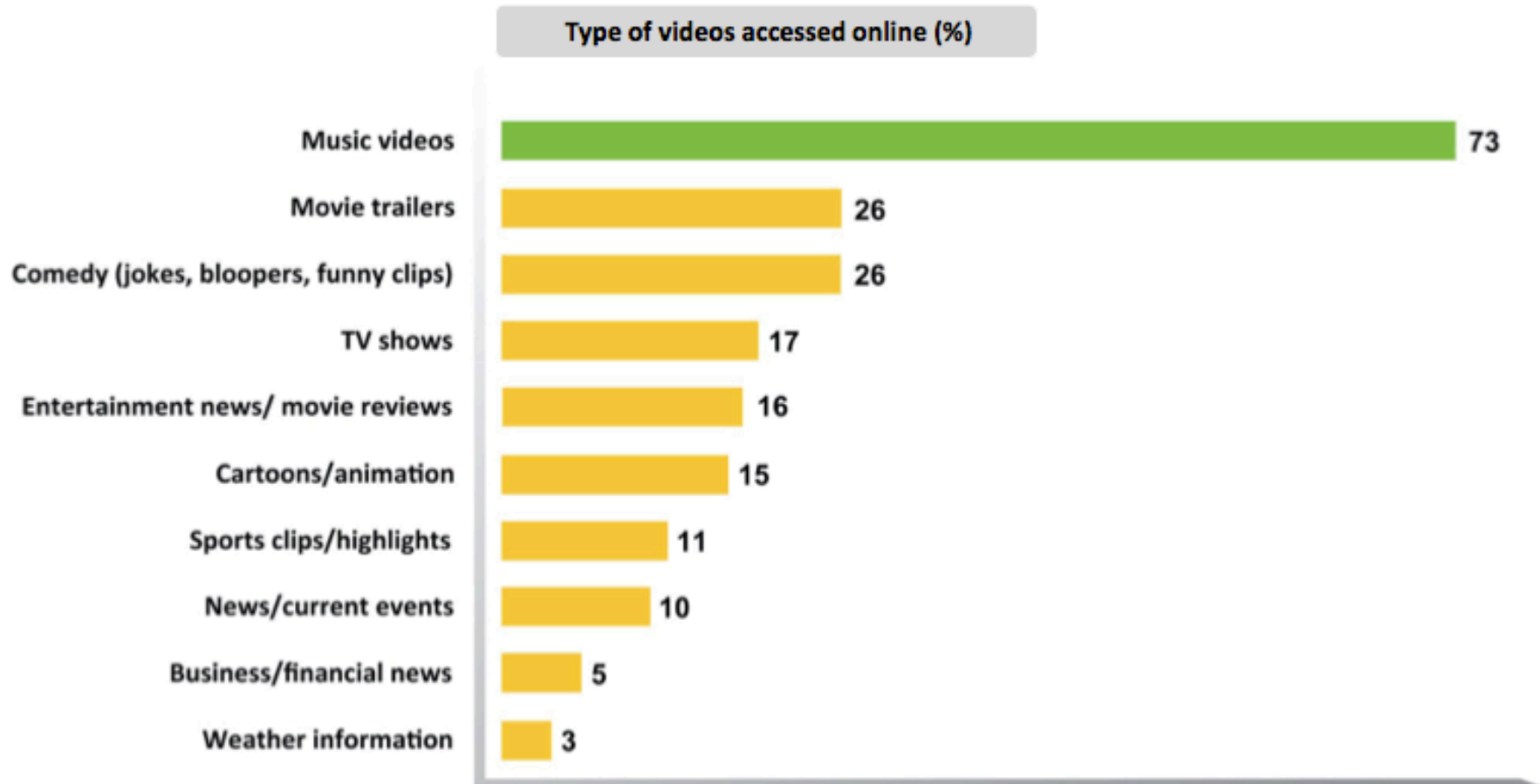
**Be free**  
with GLOBE MOBILE INTERNET

**P5 for 15 mins.**  
Text INFO to 1111

Base: Past month Internet users aged 10+ across National Urban Philippines  
Source: Yahoo!-Nielsen Net Index 2010



# Evident from the popularity of online music videos



Base: Past month Internet users aged 10+ across National Urban Philippines who have accessed UGC sites in the past month

Source: Yahoo!-Nielsen Net Index 2010

2011



# THE PHILIPPINES

**94,013,200**

TOTAL POPULATION



63%

URBAN

37%

RURAL

**29,700,000**

INTERNET USERS



32 %

INTERNET PENETRATION

**26,752,000**

USERS ON TOP SOCIAL NETWORK



28 %

SOCIAL NETWORK PENETRATION

**88,119,840**

MOBILE SUBSCRIBERS



94 %

MOBILE PENETRATION

# WeAreSocial PH Facts

- 87% stream or download online video.
- 47% watch TV or content over the Internet.
- 68% listen to music online.

## Despite this stability, overall engagement is on the rise. Social networking now dominates...

Select Monthly Online Activities (%)	2009	2010	2011
Visiting Social Networking sites	51*	53	82 ↑
Search	58	76	80 ↑
Instant messaging	63	68	69 ↑
Internet Portal	54	73	67 ↑
Visiting public chat rooms	54	67	65 ↑
Email	63	65	64
Played games online	53	45	54
Listen to songs in music websites	-	-	45
Downloaded or uploaded music files online	25	37	37 ↑
Shared/posted something online that you created	15	24	36 ↑

↑ Activities showing significant increase at 95% confidence levels between 2009 and 2011

\* Note. The 2009 figure for social networking includes community groups /forums

Base: Past month Internet users aged 10+ across National Urban Philippines

Source: Yahoo!-Nielsen Net Index 2010, 2011



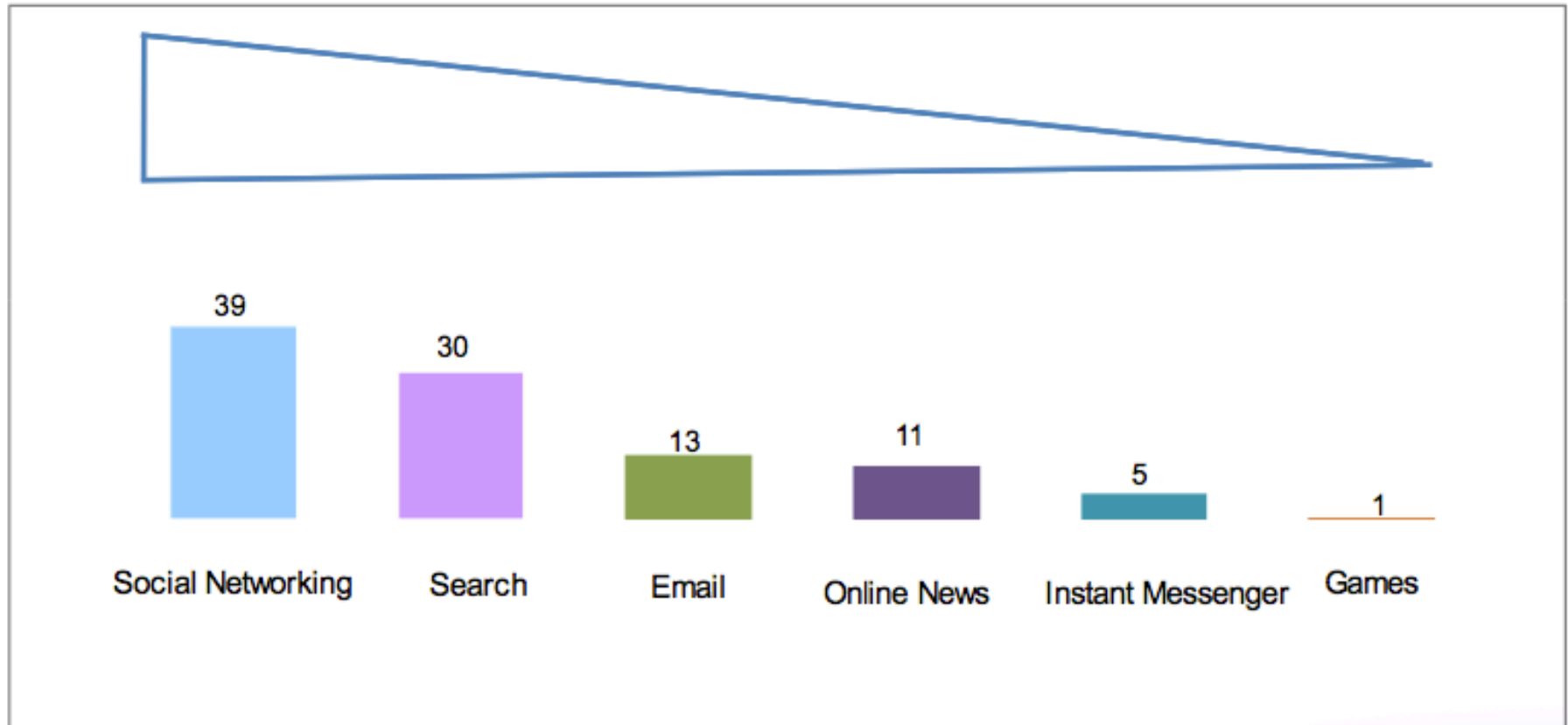
## Evident from the increased time being spent online, across mediums and locations

	Place of Access (Weekly Avg. Time Spent)			
	Home	School	Work	Internet cafes
2009	4.8	3.4	7.7	4.5
2011	10.4 ↑	5.2 ↑	11.5 ↑	5.5 ↑



# Not just an activity but a starting point for the online experience for many

Internet Usage Pathway (%)



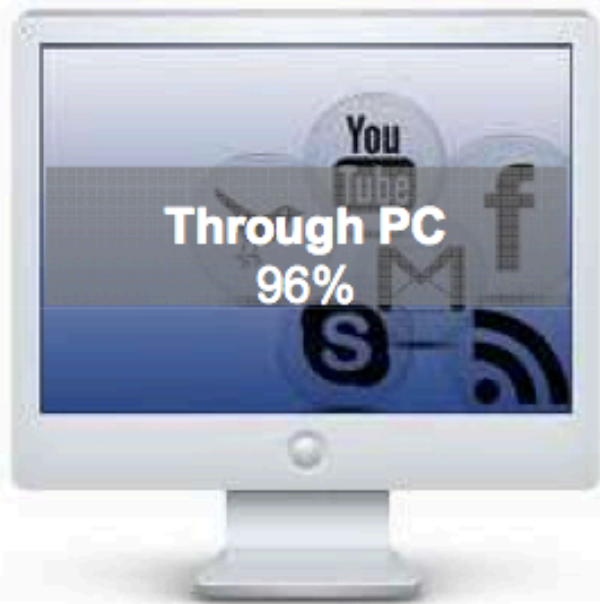
Question: Please think about the following online services and tell me the order in which you first ever used each.

Base: Past month Internet users aged 10+ across National Urban Philippines

Source: Yahoo!-Nielsen Net Index-2011

# Updating profile is mainly done through PC, Mobile updates reflect Mobile usage (low)

Mode for updating Social networking profile (%)

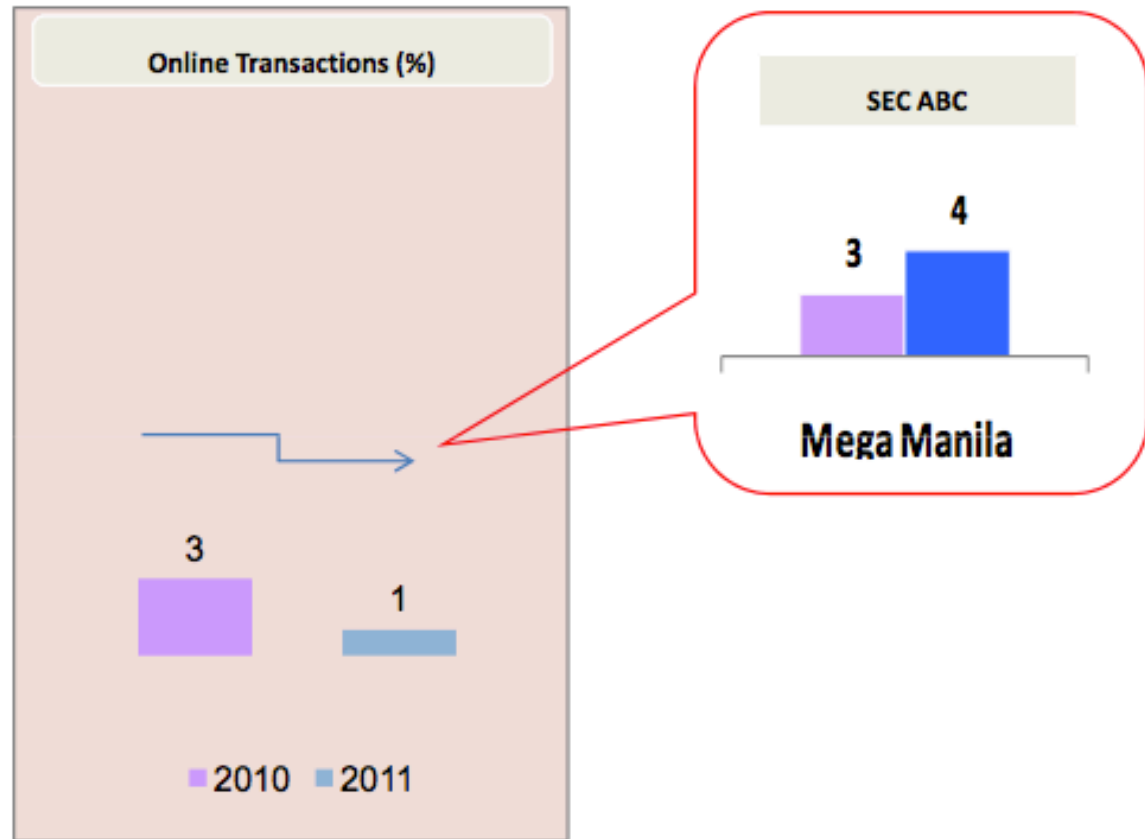


Question: How do you usually view/ update your Social Networking sites?

Base: Past month Internet users aged 10+ across National Urban Philippines who have visited social networking in Past 3 months

Source: Yahoo!-Nielsen Net Index 2011

# Online transacting remains in it's infancy



Question: Have you purchased products online in the past 12 months... payment could be online or offline?

Base: Past month Internet users aged 10+ across National Urban Philippines  
Source: Yahoo!-Nielsen Net Index 2011

2012

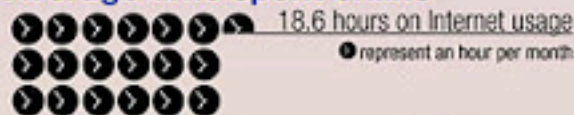
## Online population



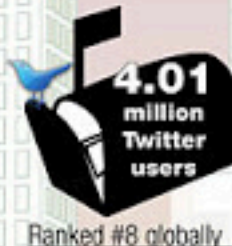
## Mobile penetration



## Average time spent online



Ranked #7 globally  
Ranked #3 in Asia



'Social networking' capital of the world

Ranked #8 globally

## Accessing the Internet



## Online behaviours



# Top five trends

- 1 Mobile takes the lead
- 2 Location-based marketing becomes important
- 3 E-commerce begins to dominate
- 4 Searching becomes big business
- 5 Media set to be revolutionised

# Digital Media in Philippines

@janicechuaajf @gloriayeo @paulchensc @zininglim

<http://bit.ly/dmph2011>



SOURCES: University of Macau International Social Media Research Wave 3, New Media Philippines, World Economic Forum, Internet World Stats



# EYE ON: THE PHILIPPINES

## POPULATION

103,775,000 (1 figure represents 1 million people)



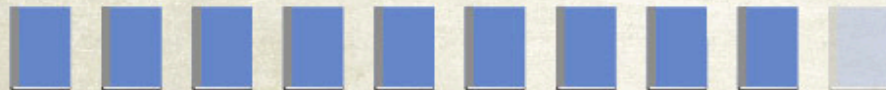
## INTERNET USERS

8,278,000; 34<sup>th</sup> in the world (1 monitor represents 1M users)



## LITERACY RATE

9 out of 10; Approximately 93,397,500



## ECONOMY

**\$4,100**

GDP per capita  
in USD

**158<sup>th</sup>**

GDP per capita  
ranking, out of  
226 countries

**\$390B**

Approximate total  
GDP in USD

**33<sup>rd</sup>**

Total GDP ranking,  
out of 226 countries

**32.9%**

Population living  
below poverty line



## GEOGRAPHY

**300,000** Total kilometers

**7,107** Total islands



## DEMOGRAPHICS

**72** Life expectancy

**22.9** Average age

## NATIONAL HEROES



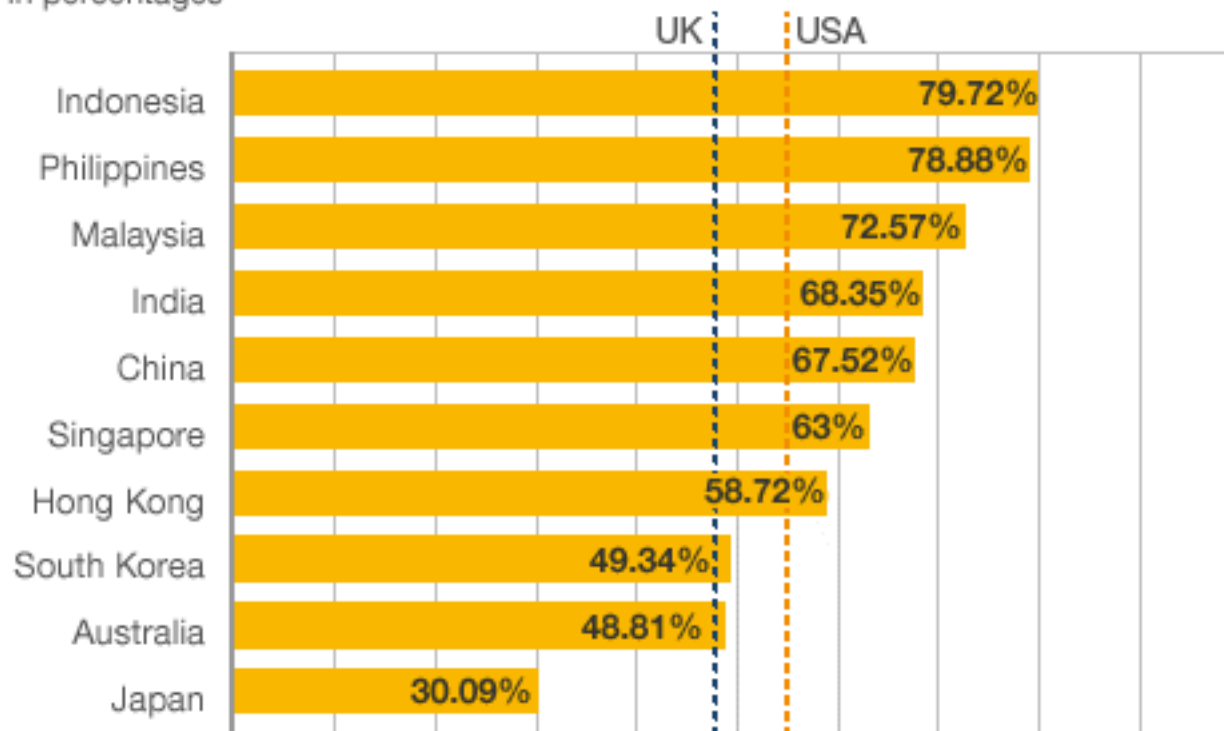
Manny Pacquiao  
Champion boxer



Jose Rizal  
19th century  
Nationalist

## Internet users in Asia using social media networks

In percentages



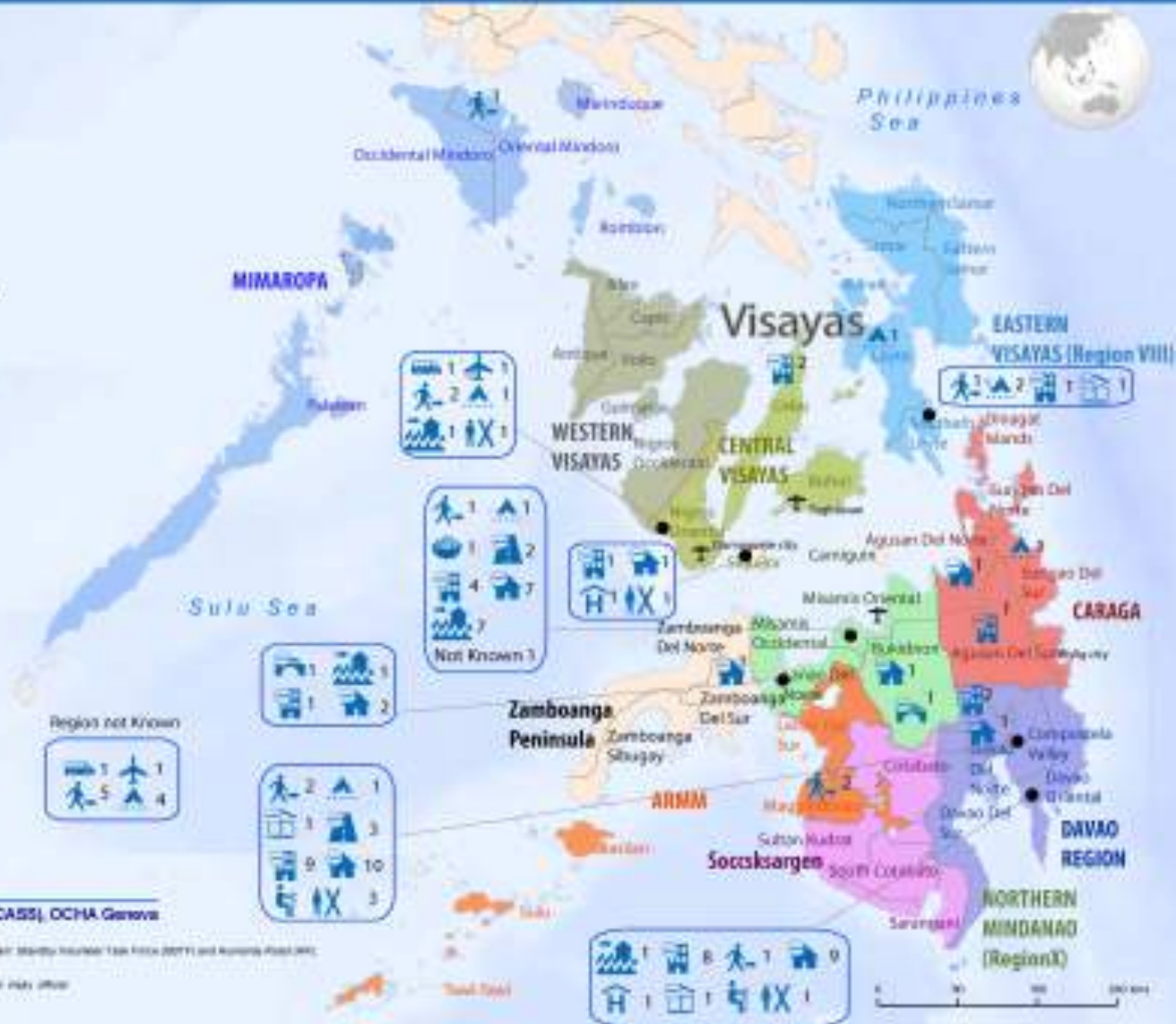
Source: GlobalWebIndex Survey 2010

<http://www.bbc.co.uk/news/world-asia-17054056>



**Information Categories**

- Displaced Population
- Crop Damage
- Evacuation Centre
- Flooding
- Damaged Houses
- Damaged Infrastructure
- Damaged Hospitals/Health facilities
- Damaged Roads
- Damaged Bridges
- Damaged Vehicles
- Flight Cancellations
- Death(s) Reported
- Damaged Schools



Coordinated Assessment Support Section (CASS), OCHA Geneva  
 Creation Date: 06 December 2012  
 Map data sourced from: Google Maps/Mapbox, National Geographic, OpenStreetMap, and various local sources.  
 Disclaimer: The names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

<http://irevolution.net/2012/12/08/digital-response-typhoon-pablo/>

<http://irevolution.net/2012/12/06/digital-disaster-response-typhoon/>





## HABITS AND ATTITUDES: DIGITAL / ECOMMERCE / OPPORTUNITY GAP

**79.5**  
MINUTES SPENT PER VISITOR PER MONTH ON  
RETAIL WEBSITES

**17.4**  
PHILIPPINES  
AVERAGE

{ OPPORTUNITY  
GAP }

“If the enthusiasm of consumers can cause the Philippines to invest in improving some infrastructure and regulatory issues...[it] could see great advances in its mobile payments future.”

Source: MasterCard Mobile Payments Readiness Index, 2012

2013

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# COUNTRY PROFILE



## POPULATION

98,684,096

## ECONOMY

7.2% 2013 GDP GROWTH

## INTERNET USERS

36,240,000



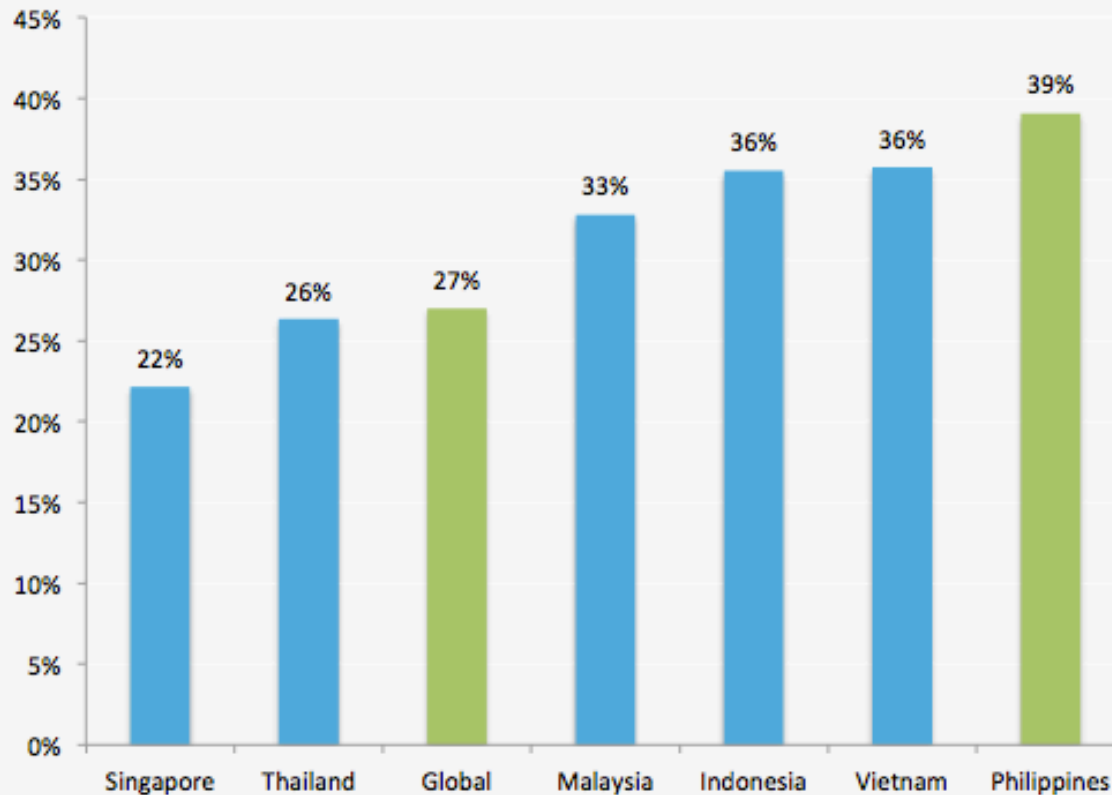
OVER 100%  
MOBILE  
PENETRATION  
(through multiple  
SIMS per user)

Sources: Population - Philippines Commission on Population, Nov 18, 2013 estimate; Economy – Philippines Socioeconomic Planning Secretary Arsenio Balicasan \*Note: the last official census in the Philippines was performed in 2010; this is an estimate based on historic growth rates and does not include the Filipino diaspora, which includes another 10+ million people



## COUNTRY PROFILE: UNIQUE TREND/ EBOOKS

ONLINE POPULATION EXPRESSING INTEREST IN EBOOKS  
(Q2 2013)



Filipino netizens showed more interest in eBooks as an online retail category than any other country in the world, in a 2012 survey.

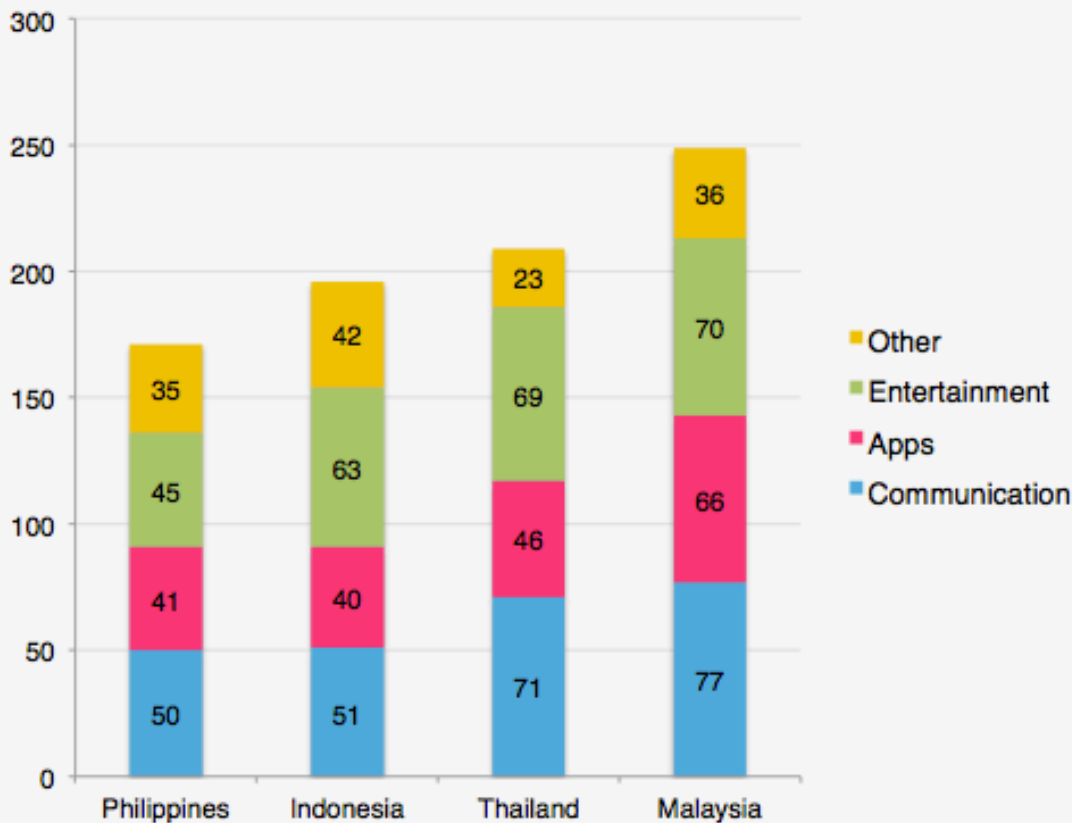
Several other Southeast Asian countries also exceeded the global average.

Source: GlobalWebindex—Social Stream report, Q2 2013; covers web users ages 16-64



## HABITS AND ATTITUDES: MOBILE / TOP MOBILE ACTIVITIES

TIME SPENT ON SMARTPHONES EACH MONTH

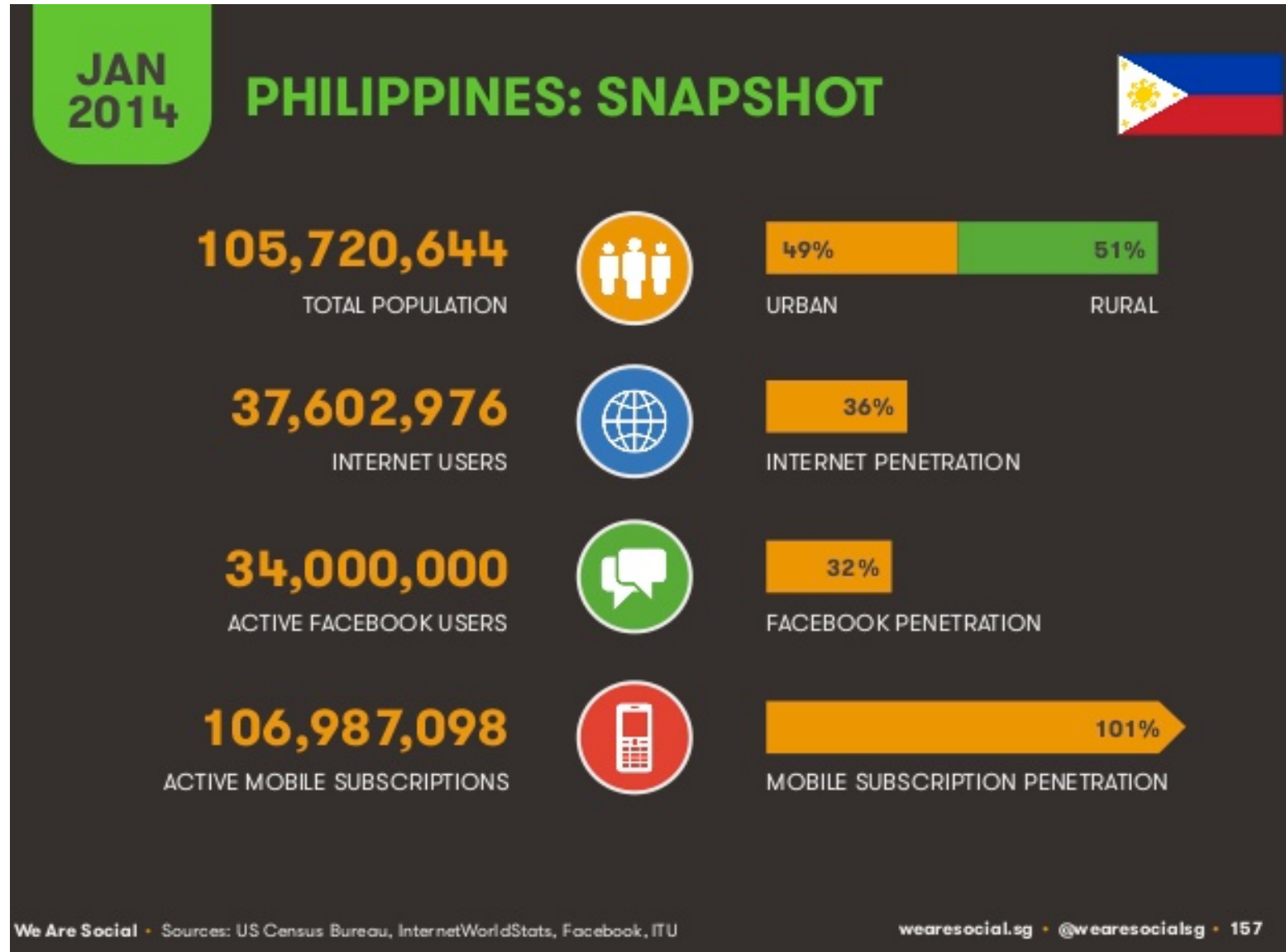


The average Filipino smartphone owner spends 171 minutes per day on his or her device. Time is apportioned fairly evenly between entertainment, apps and communication.

Source: Nielsen, Decoding the Asian Mobile Consumer, 2013

2014

# Social, Digital, Mobile in the Philippines





TRAVEL & TOURISM

**+160%**

CONSUMERS IN THE PHILIPPINES WHO FOLLOW TRAVEL & TOURISM BRANDS ONLINE SPEND UP TO 160% MORE ON TRAVEL & TOURISM PRODUCTS AND SERVICES PER YEAR.



Those who follow  
**HEALTHCARE BRANDS**  
online spend up to  
**257% more**  
on such products and  
services per purchase

Source: Waggener Edstrom (WE) Communications  
Report - Content Matters: The Impact of Brand  
Storytelling Online in 2014