

The Connected Consumer Q2 2020

PREPARED BY DECISION LAB

AUGUST 2020

Introduction



Background

The Connected Consumer is a quarterly study conducted by Decision Lab starting in 2019. The study focuses on consumers' online habits, including social media usage, entertainment (music, movies, online videos), as well as online shopping. Data in this report is collected using Decision Lab's online panel.

Disclaimer: This report has been prepared solely for information purposes over a limited time period to provide a perspective on the market. Information, analyses and conclusions contained herein should not be construed as definitive forecasts or guarantees of future performance or results. Decision Lab shall not be liable for any loss arising from the use of this report.

Online quantitative survey using Decision Lab's online panel

APR 2020 – JUNE 2020

SAMPLE COLLECTION PERIOD

1099

TOTAL SAMPLE SIZE

DEC 2019 – FEB 2020

SAMPLE COLLECTION PERIOD

2149

TOTAL SAMPLE SIZE

AUG 2019 – SEP 2019

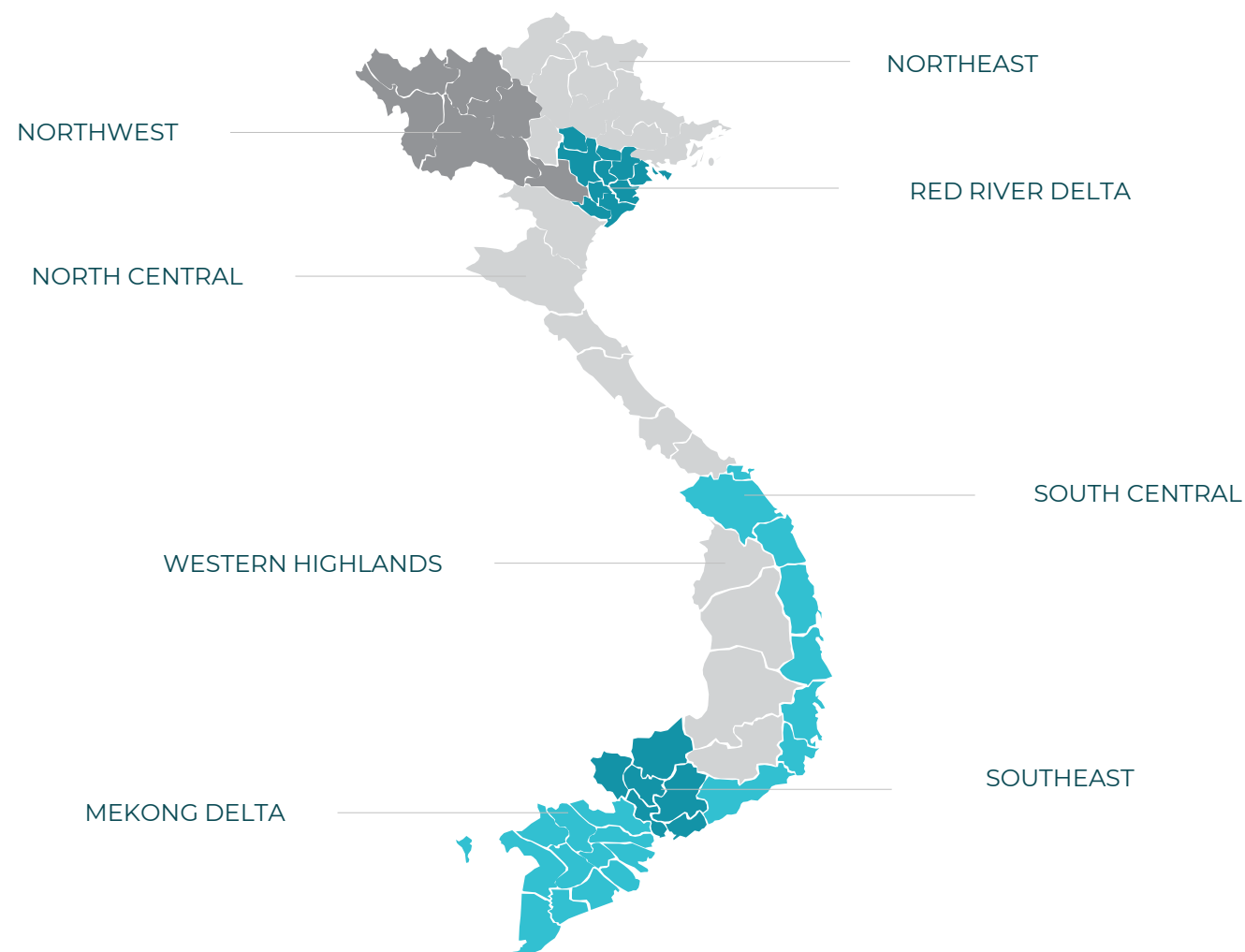
SAMPLE COLLECTION PERIOD

457

TOTAL SAMPLE SIZE

NATIONWIDE

MALE & FEMALE 15 - 60



The Connected Consumers' profiles



GEN Z

BORN BETWEEN 1997 – 2005

AGE 15 - 23



GEN Y (MILLENNIALS)

BORN BETWEEN 1981 – 1996

AGE 24 - 39



GEN X

BORN BETWEEN 1960 – 1980

AGE 40 - 60

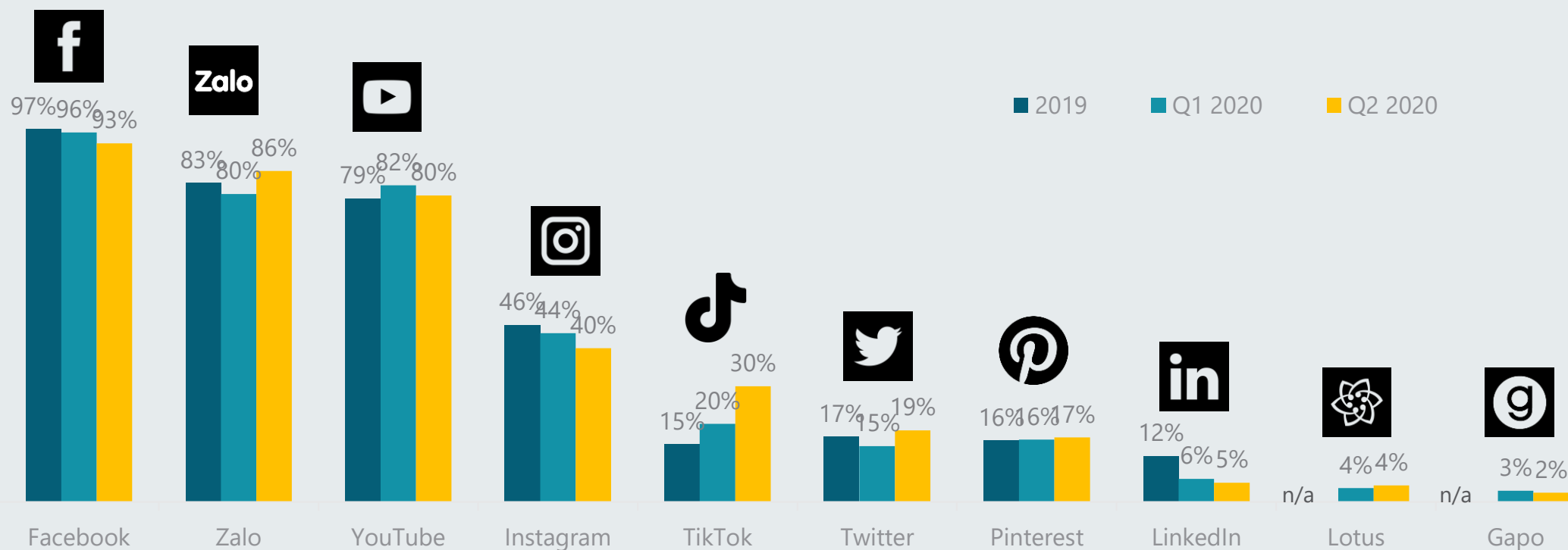


The Top platforms



Facebook holds on to the top spot, Zalo and YouTube competing for the second, and TikTok is catching up with Instagram

Most used social media platforms



Q: Which of the following social media platforms are you using? (Choose all that apply)

2020 Q2 n=1099 2020 Q1 n=2149
2019 n=457

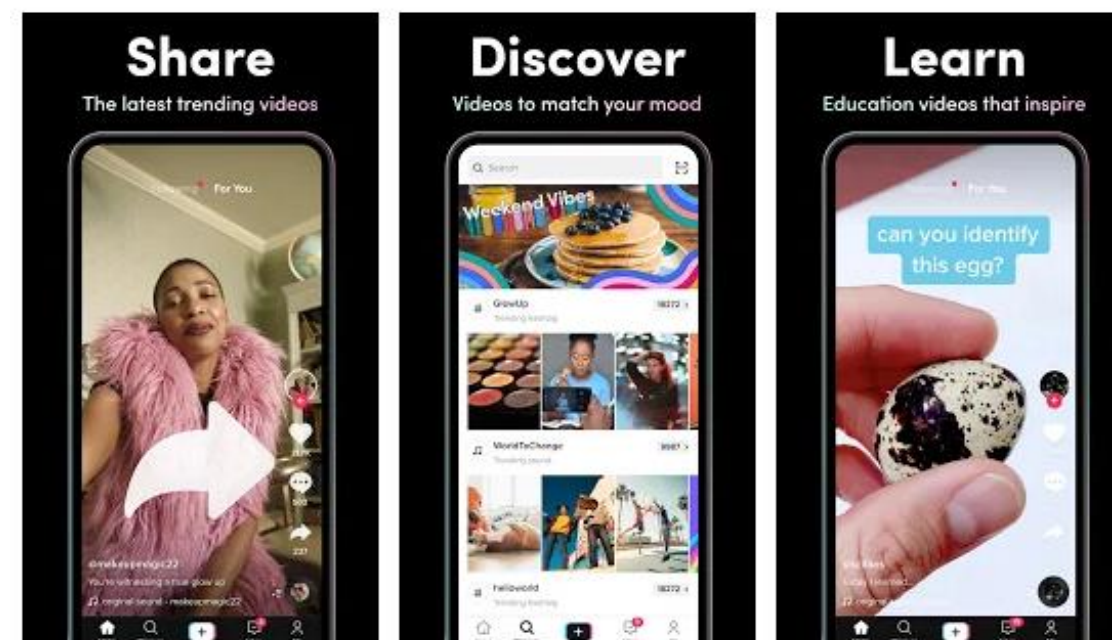
Videos on TikTok might be short, but their popularity is here to stay. Just recently, Instagram also introduced Reels, a new feature allowing users to create and upload short videos

Instagram



Source: [Instagram's announcement](#)

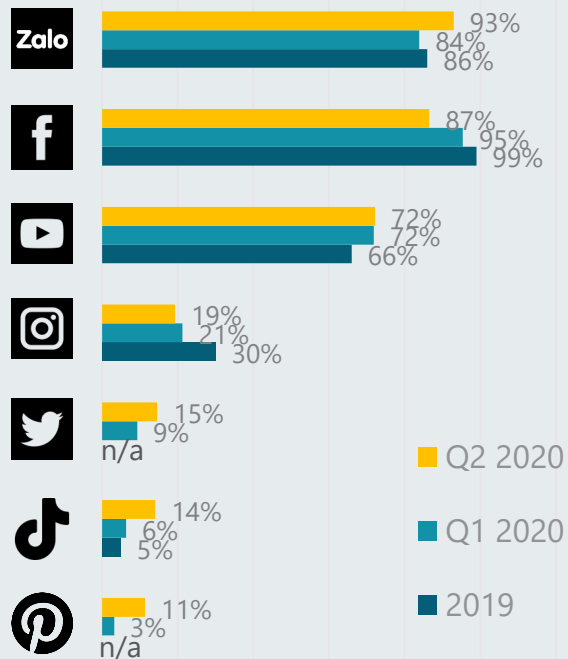
TikTok



Source: [TikTok on Google Play](#)

Zalo, TikTok and Twitter surge among Gen X and Gen Z, Instagram holds on to Gen Z but losing popularity among Gen X and Gen Y

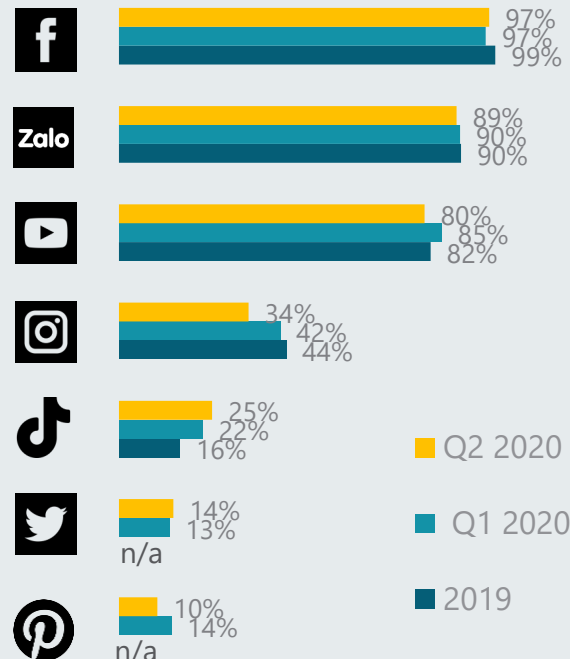
Gen X



Q: Which of the following apps do you use? (Choose all that apply)

2020 Q1 n=266
2020 Q2 n=148

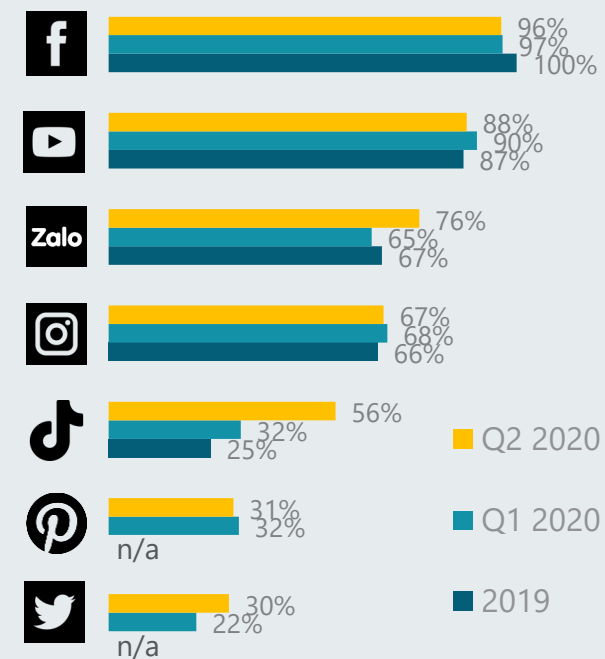
Gen Y



Q: Which of the following apps do you use? (Choose all that apply)

2020 Q1 n=937
2020 Q2 n=533

Gen Z



Q: Which of the following apps do you use? (Choose all that apply)

2020 Q1 n=914
2020 Q2 n=418

#danceAwesome challenge

The popularity of YouTube, Instagram, TikTok and Pinterest among Gen Z indicates that this is an audio-visual generation.

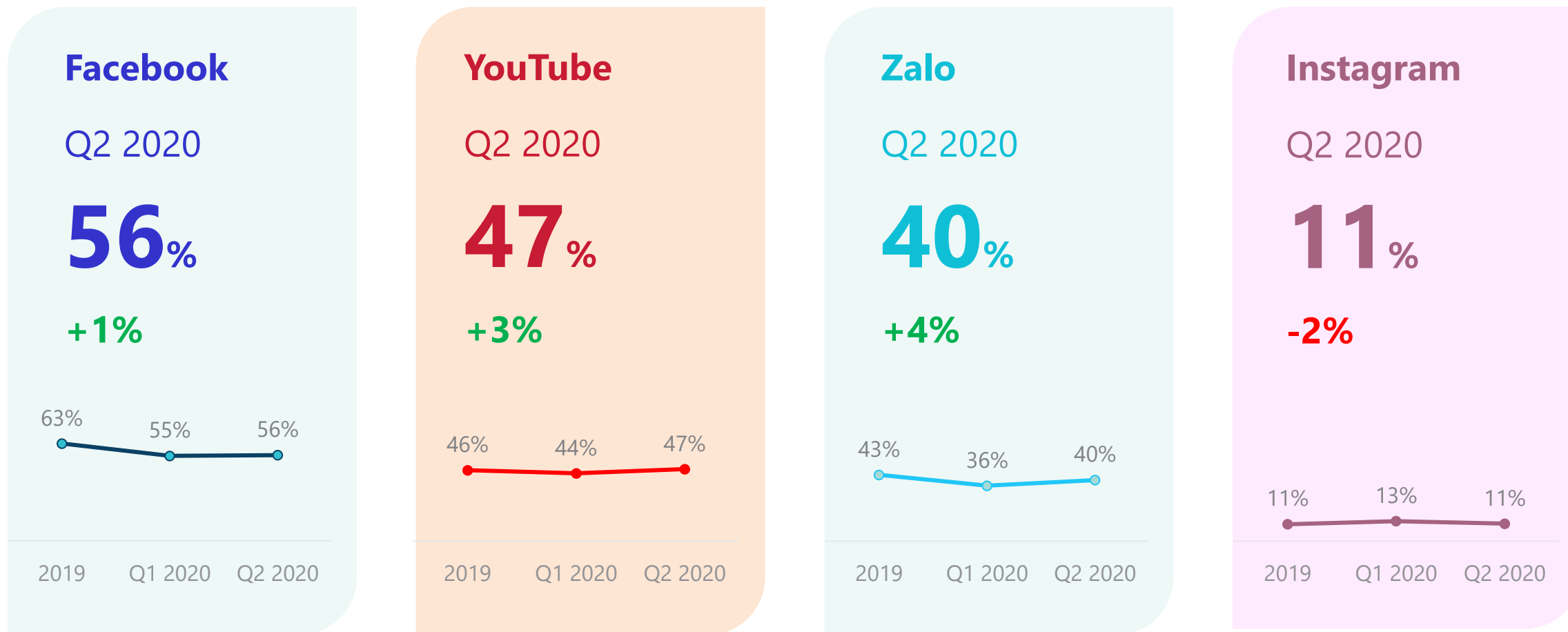
Short, easy-to-remember hashtag plus catchy audio-visual content is the way to approach Gen Z



#danceAwesome
with BLACKPINK

AWESOME

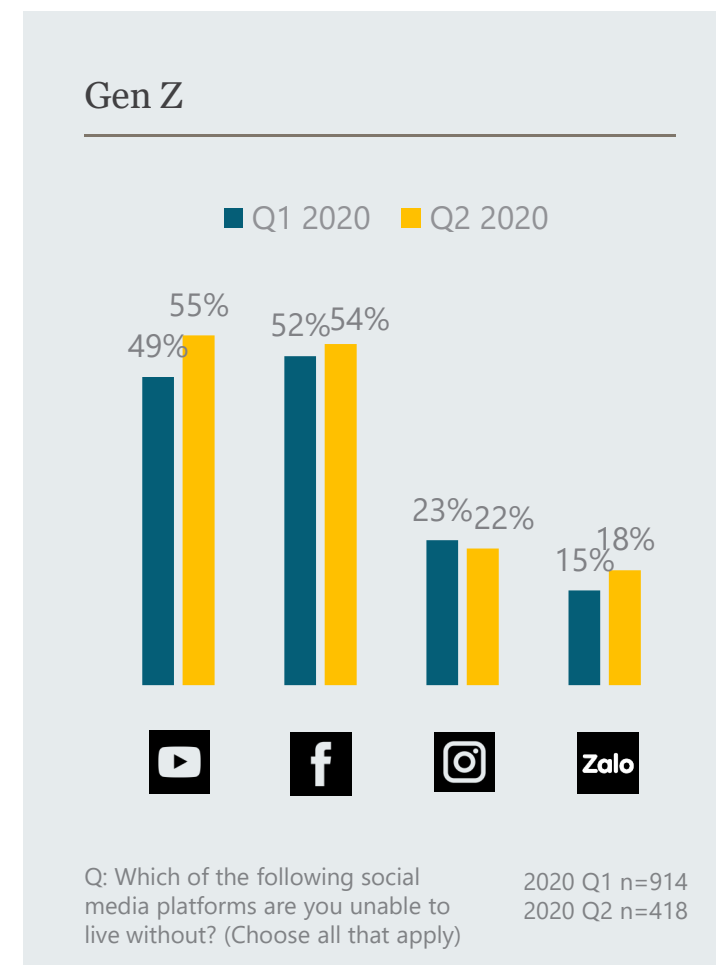
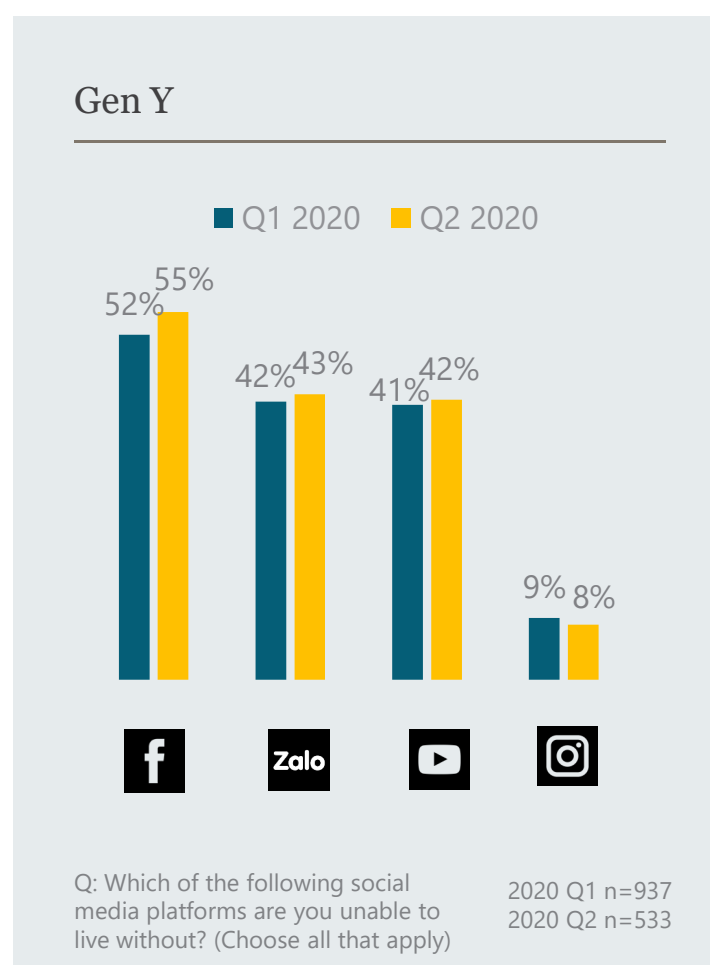
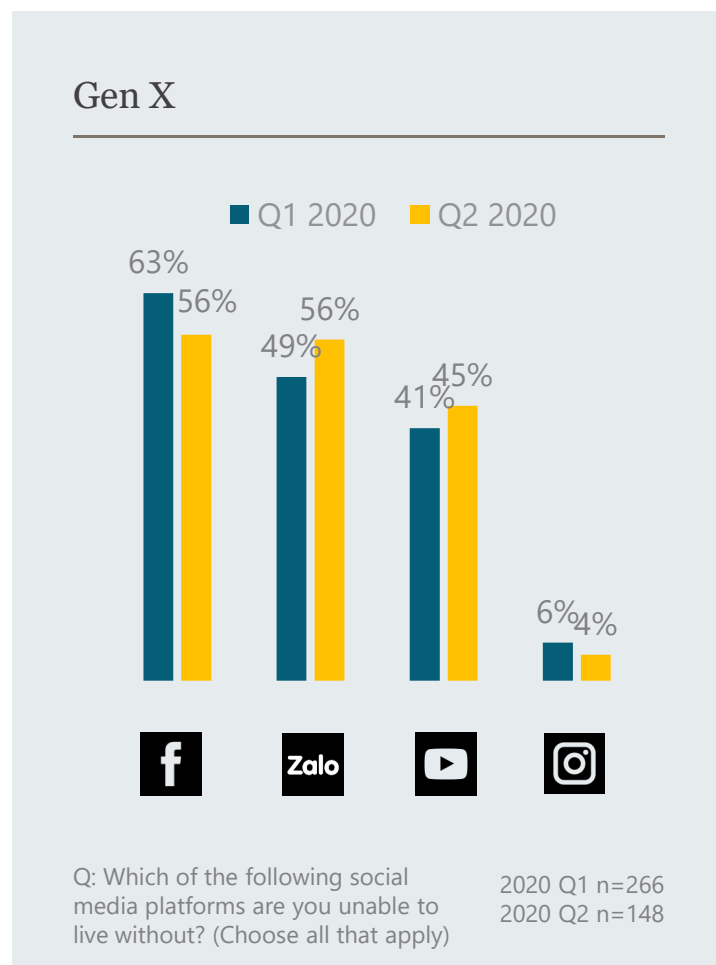
The majority of consumers cannot live without Facebook, but this platform has not yet achieved total dominance



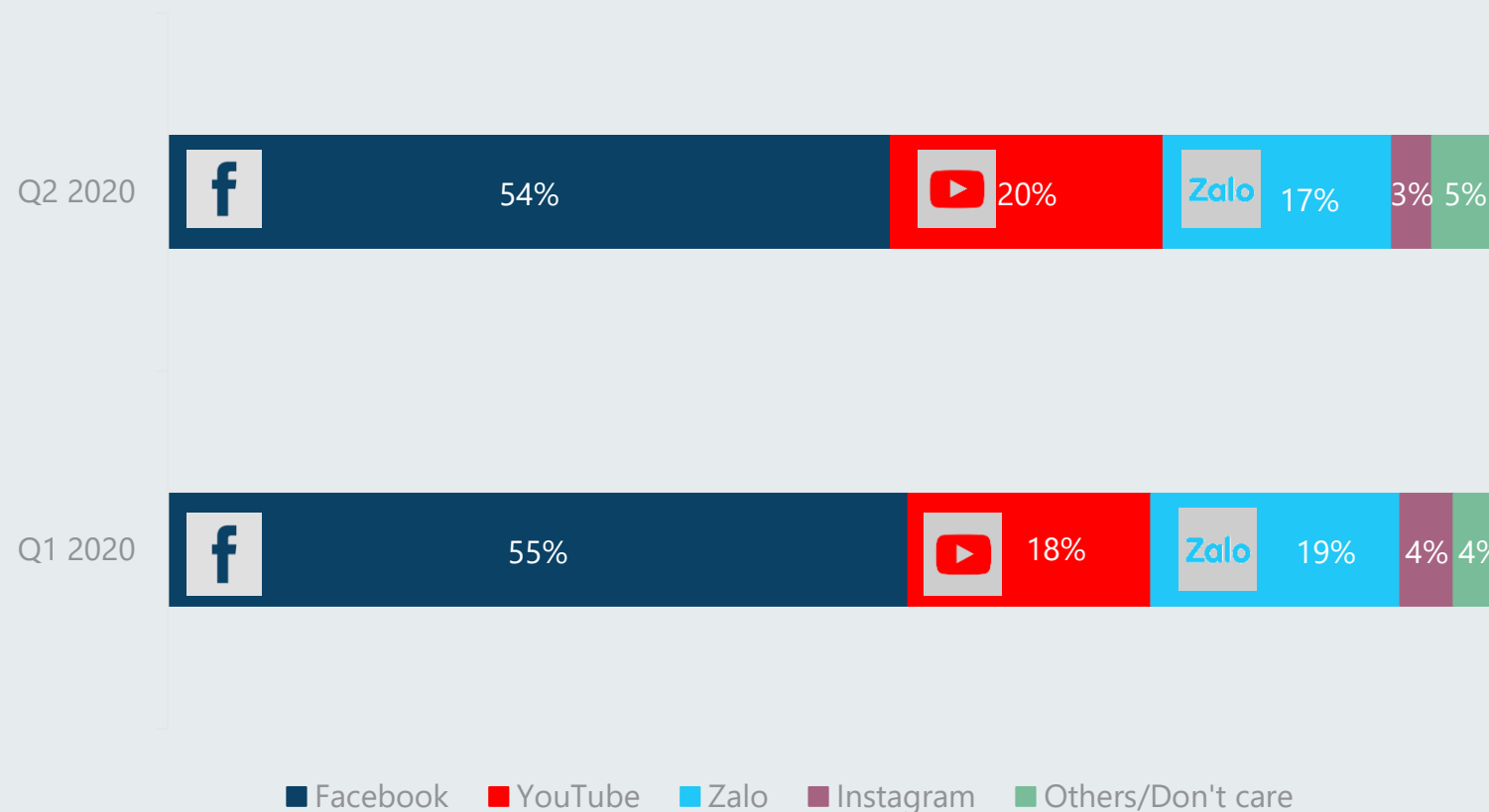
Q: Which of the following social media platforms are you unable to live without? (Choose all that apply)

2020 Q2 n=1099 2020 Q1 n=2149
2019 n=457

Zalo is catching up with Facebook when it comes to Gen X, while YouTube is fighting Facebook for the top spot among Gen Z



What is consumers' primary app?

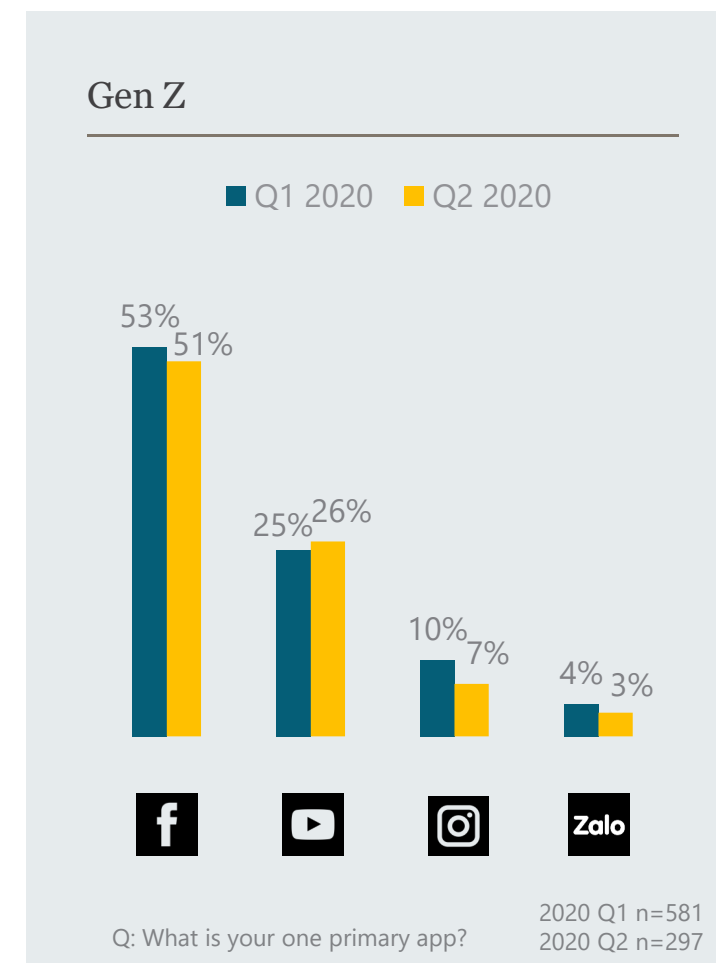
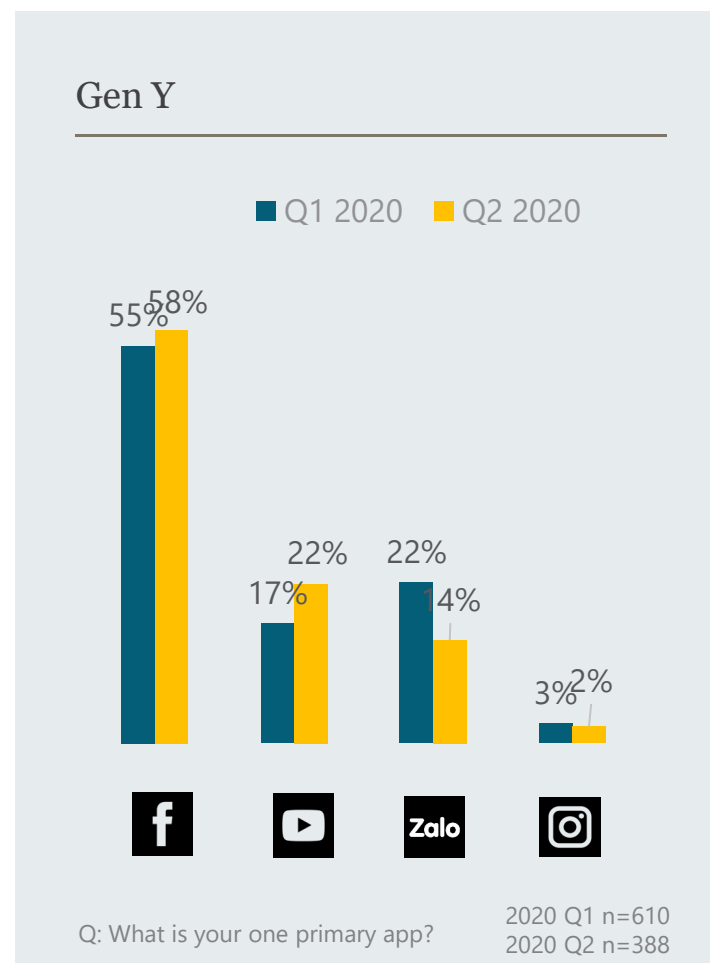
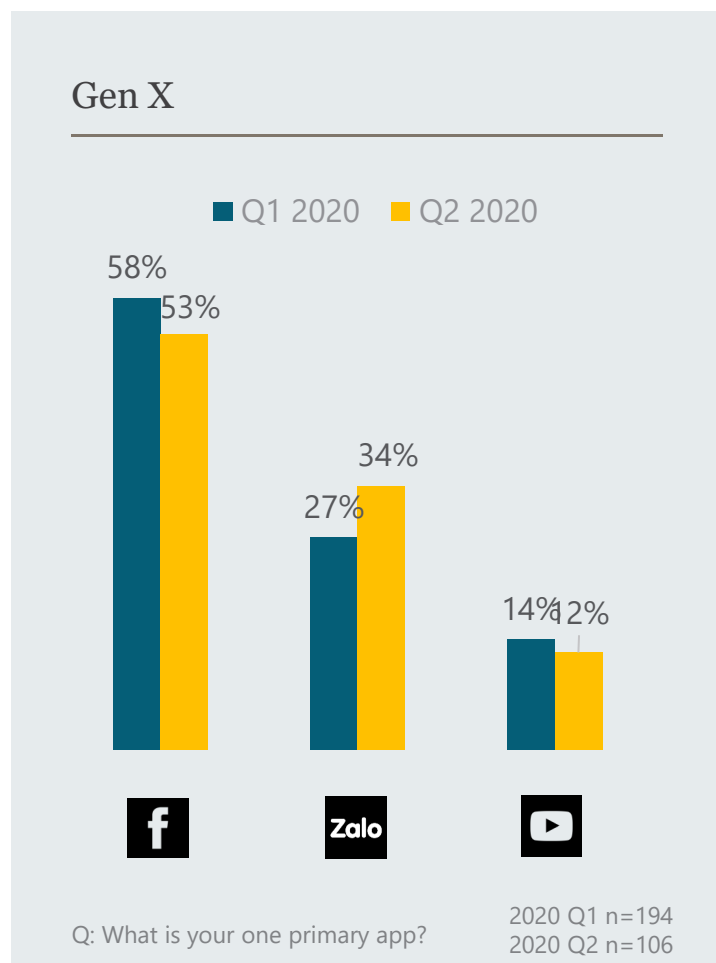


When asked to select only 1 primary app, Facebook is the choice for a majority of consumers. YouTube and Zalo are competing for the 2nd spot.

Q: What is your one primary app?

2020 Q1 n=1439
2020 Q2 n=796

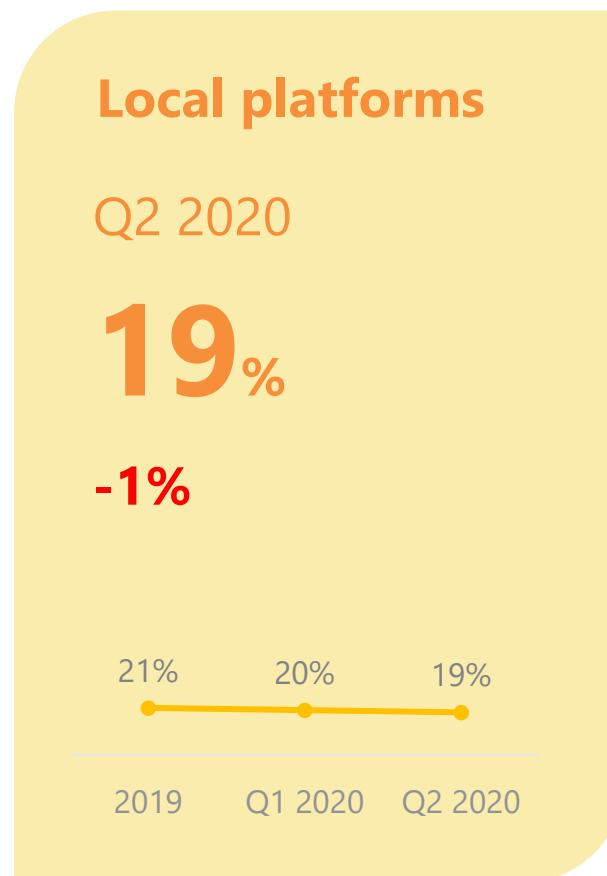
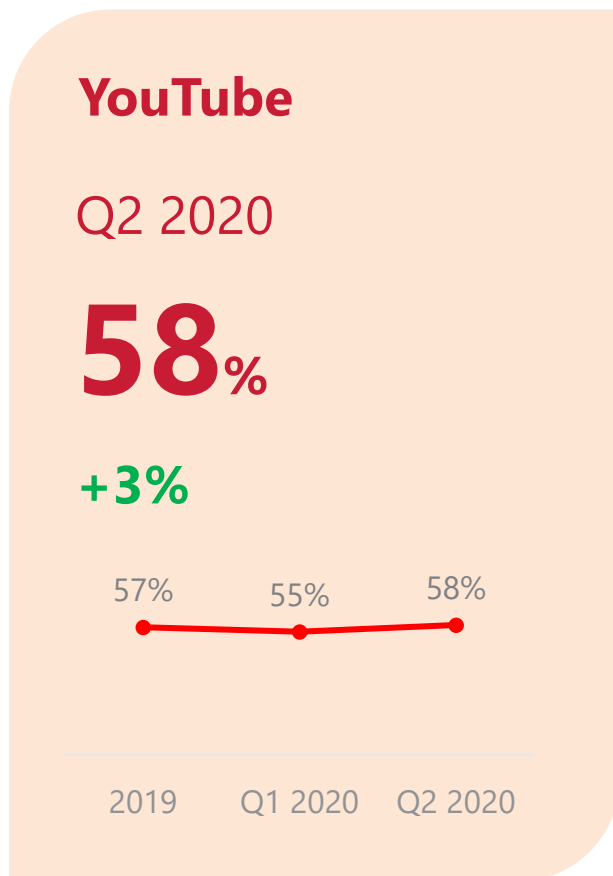
Facebook remains the primary app for all generations, while Zalo falls behind YouTube among younger generations



The background is a collage of various icons and symbols related to technology and social media, set against a light beige background with scattered colored dots. The icons include a smartphone, a Twitter bird, a Facebook 'f' logo, a YouTube logo, an envelope, a camera, a film strip with a play button, a Windows logo, a speaker, a Wi-Fi symbol, and an information 'i' icon. The text 'Platforms by function' is centered in a white serif font, with a white horizontal line underneath it.

Platforms by function

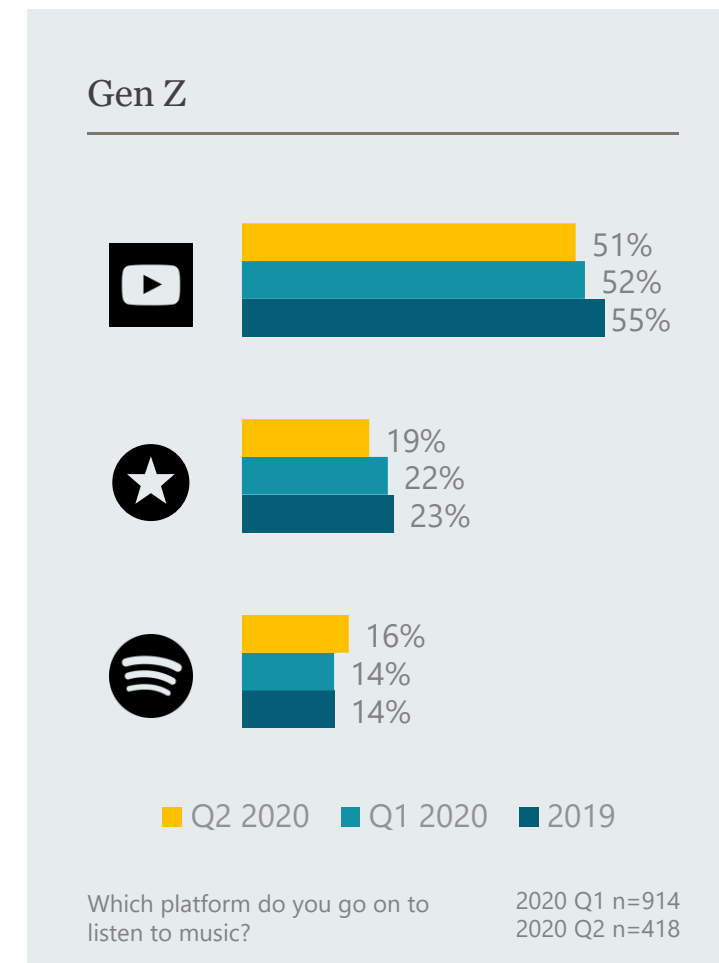
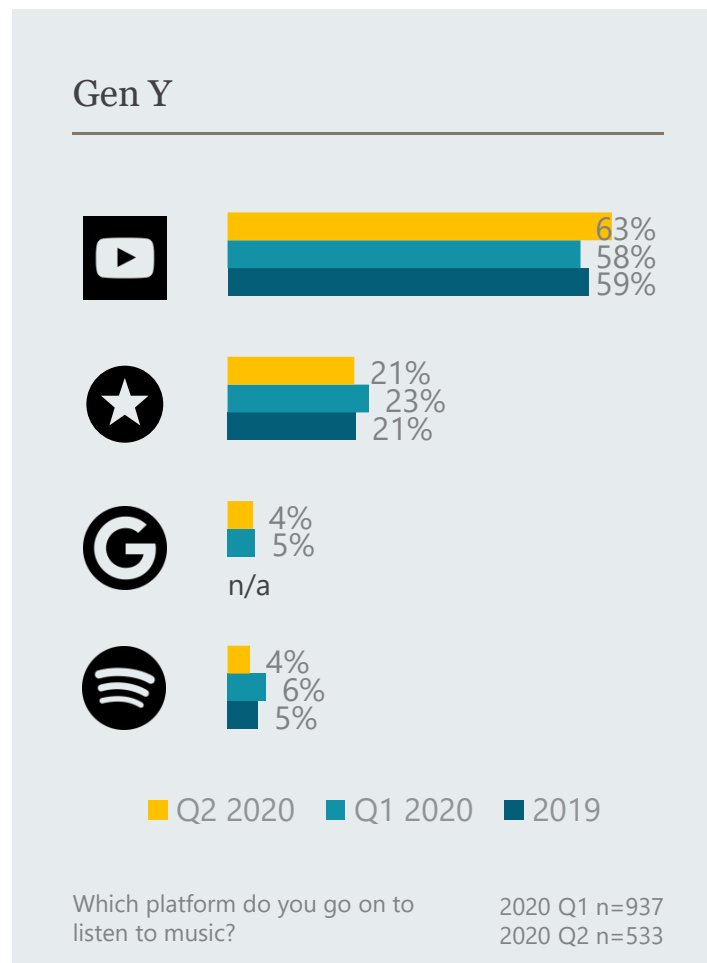
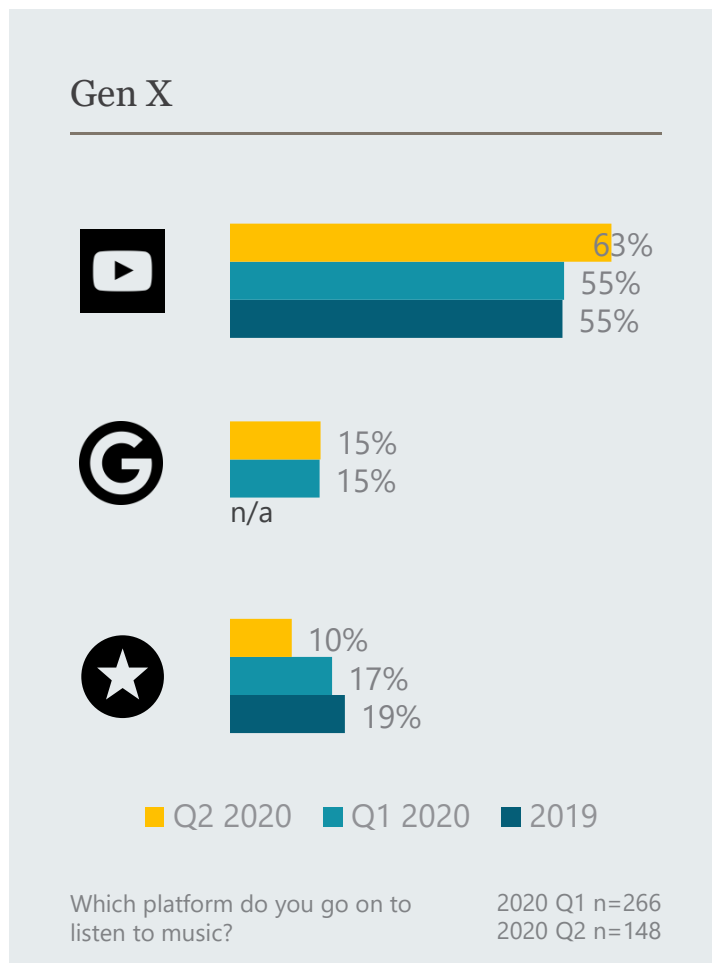
There is not much changes in consumers' preference when it comes to music platforms. YouTube reigns as the no. 1 choice for consumers



Q: Which platform do you go on to listen to music?

2020 Q2 n=1099 2020 Q1 n=2149
2019 n=457

Local music platforms are losing popularity among Gen X, while Spotify is trying to catch up with local music platforms among Gen Z





PODCAST

Humans of Vietnam - Câu chuyện của người Việt - WAVES

By Waves

PLAY

FOLLOW

ABOUT

Xin chào các bạn đã đến với show mới của WAVES – một nền tảng âm thanh trực tuyến tại khu vực Đông Nam Á. Podcast này chúng tôi sẽ gửi

**Indie Việt**

Dòng chảy mới và hứa hẹn của làng nhạc Việt.

38,633 FOLLOWERS

**Thiên Hạ Nghe Gì**

Những gì mà người bên cạnh bạn đang nghe... Ảnh bìa: Đen

24,702 FOLLOWERS

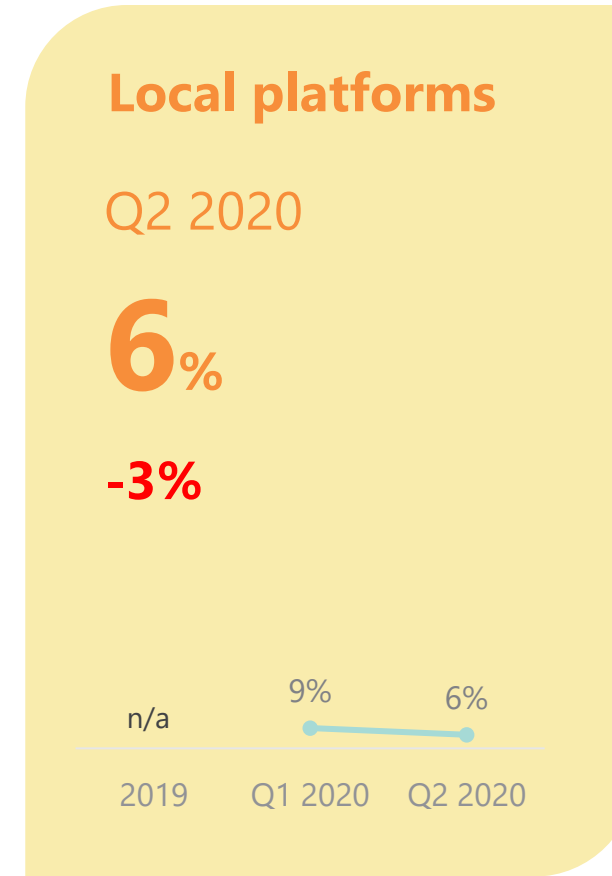
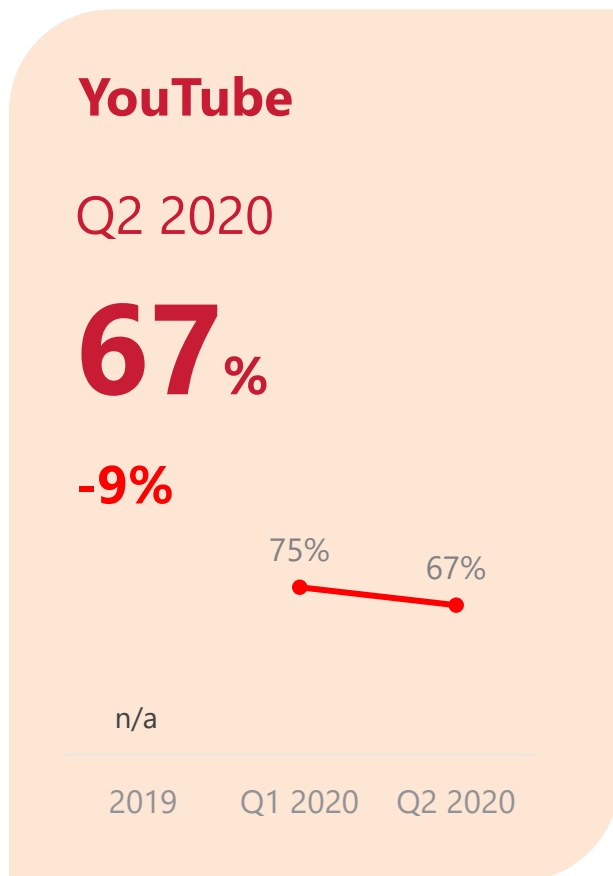
**Hip-hop Việt**

Dòng chảy ngầm của hip-hop Việt vẫn luôn cuộn cuộn với các tên tuổi Binz, Đen, Sub...

26,294 FOLLOWERS

Spotify has been localizing its contents and bring on local creators to be more friendly to Vietnamese audiophiles, however, its audience is still mostly Gen Z

Despite the drop, YouTube is still the top platform consumers go to for their music/entertainment video fix

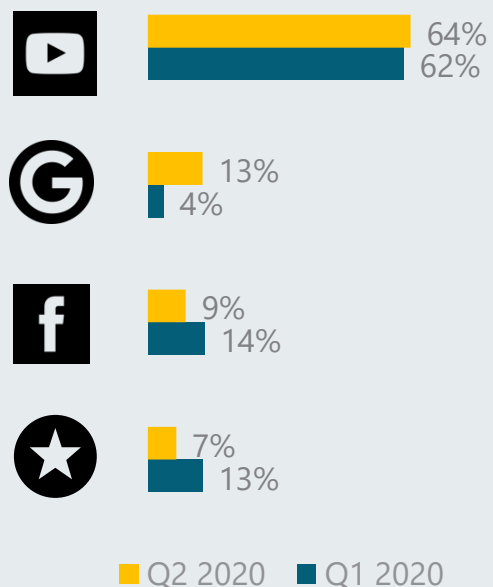


Q: Which platform do you go on when you want to watch music videos/entertainment videos?

2020 Q2 n=1099 2020 Q1 n=2149
2019 n=457

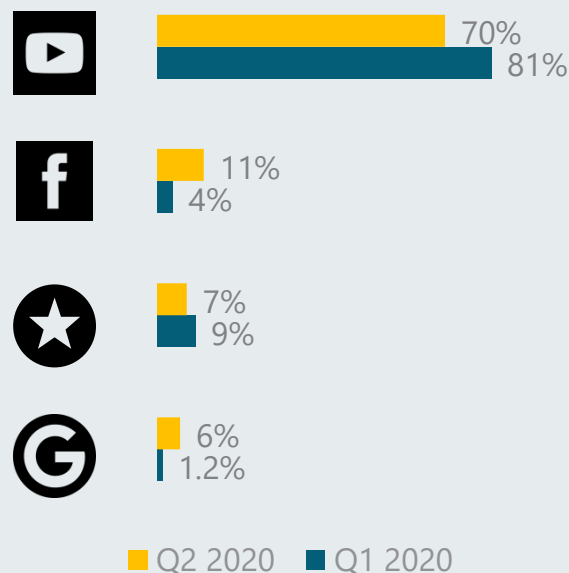
YouTube still reigns as the go-to place for music/entertainment videos. TikTok is gaining traction among Gen Z while Google Search makes a comeback among Gen X

Gen X



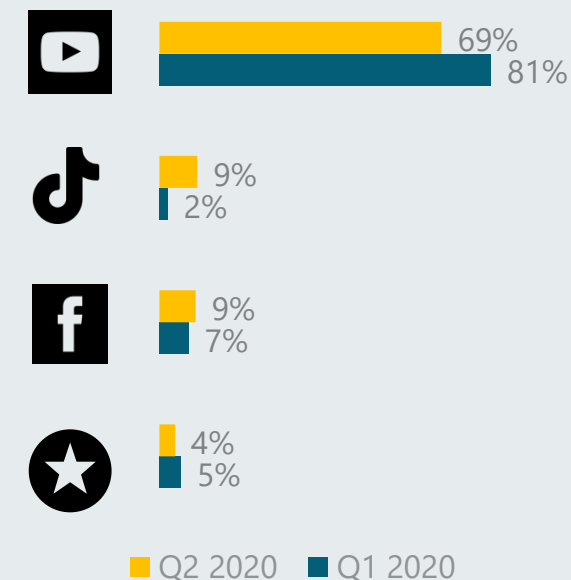
Q: Which platform do you go on when you want to watch music videos/entertainment videos? 2020 Q1 n=266
2020 Q2 n=148

Gen Y



Q: Which platform do you go on when you want to watch music videos/entertainment videos? 2020 Q1 n=937
2020 Q2 n=533

Gen Z



Q: Which platform do you go on when you want to watch music videos/entertainment videos? 2020 Q1 n=914
2020 Q2 n=418

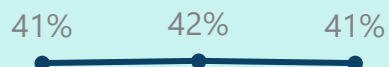
TikTok is getting recognized as a platform for short videos, meanwhile, YouTube is unable to compete for the top spot with Facebook

Facebook

Q2 2020

41%

-1%



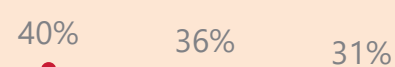
2019 Q1 2020 Q2 2020

YouTube

Q2 2020

31%

-5%



2019 Q1 2020 Q2 2020

TikTok

Q2 2020

14%

+6%



2019 Q1 2020 Q2 2020

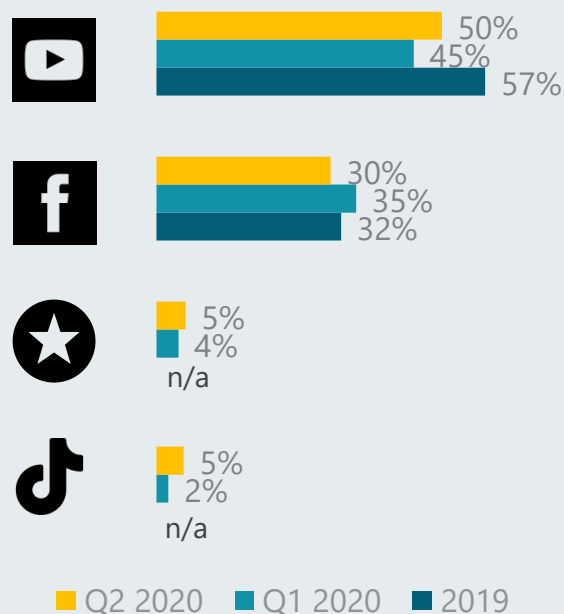
- Q: Which of the following apps do you use when watching short videos?

2020 Q2 n=1099 2020 Q1 n=2149

2019 n=457

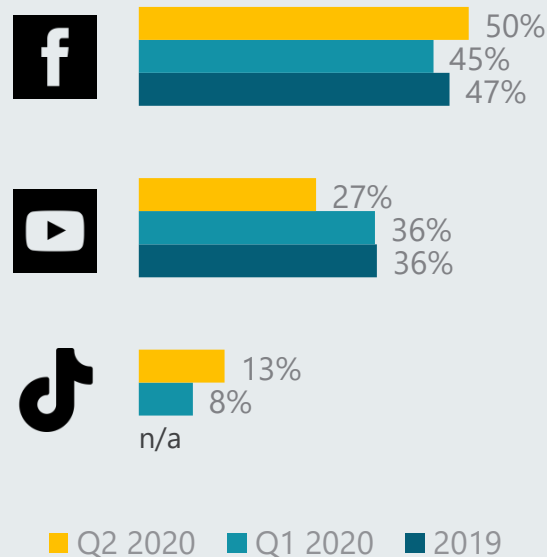
TikTok surpassed YouTube as the 2nd most popular platform for short videos among Gen Z

Gen X



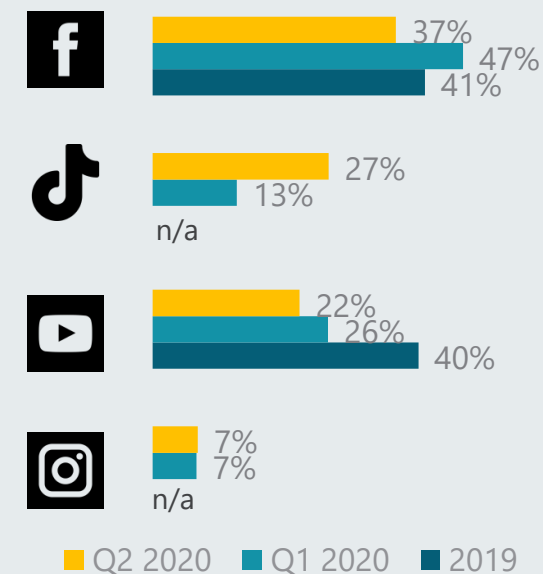
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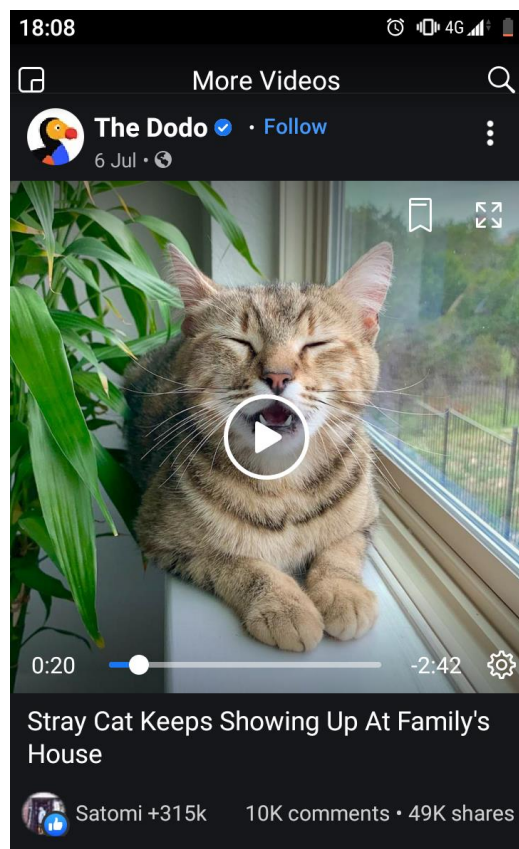
Gen Z



Q: Which of the following apps do you use when watching short videos? 2020 Q1 n=914
2020 Q2 n=418

What short videos look like on different platforms

FACEBOOK WATCH



TIKTOK



Amid an influx of movie streaming platforms, consumers turn to Google Search to browse their options

YouTube

Q2 2020

48%

-4%



2019 Q1 2020 Q2 2020

Local platforms

Q2 2020

17%

-6%



2019 Q1 2020 Q2 2020

Google Search

Q2 2020

15%

+5%



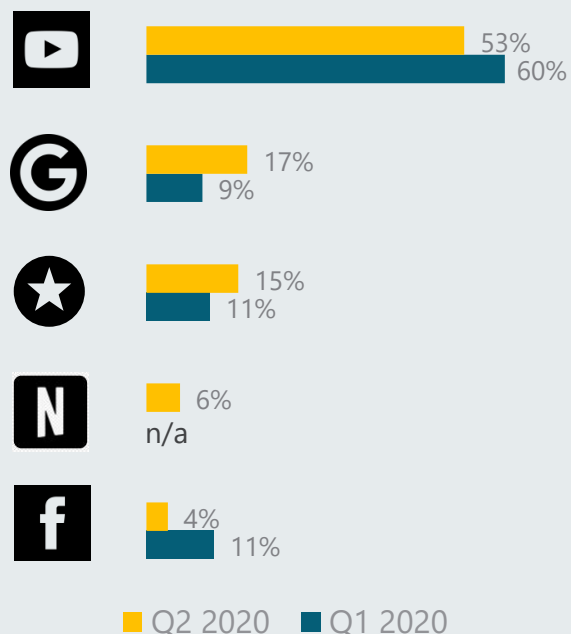
2019 Q1 2020 Q2 2020

Q: Which of the following apps do you use when watching movies?

2020 Q2 n=1099 2020 Q1 n=2149
2019 n=457

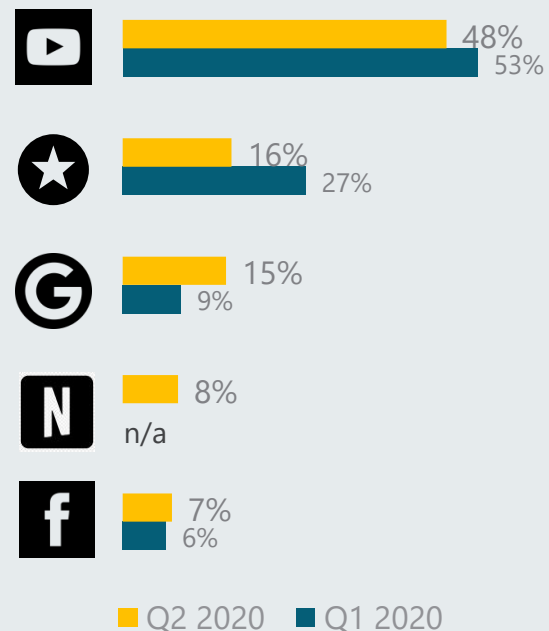
Netflix is catching up with local movie platforms among Gen Z, consumers still flock to YouTube, but not without searching for options on Google

Gen X



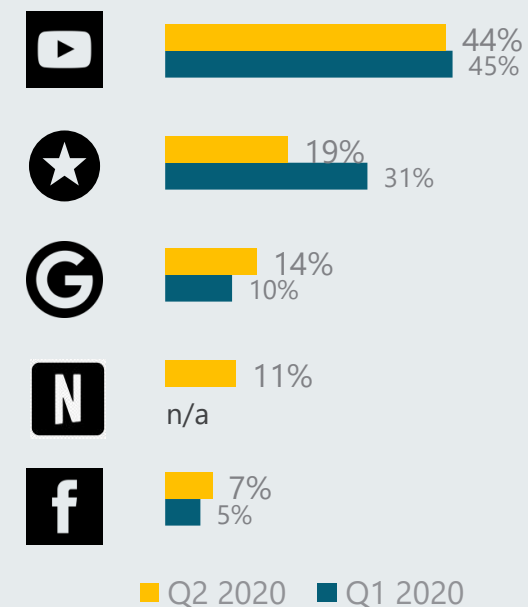
Q: Which of the following apps do you use to watch movies? 2020 Q1 n=266
2020 Q2 n=148

Gen Y



Q: Which of the following apps do you use to watch movies? 2020 Q1 n=937
2020 Q2 n=533

Gen Z



Q: Which of the following apps do you use to watch movies? 2020 Q1 n=914
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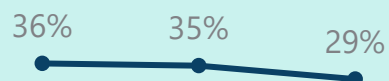
Facebook is no longer the only major news source, as consumers go on Google to look for more perspectives on current events

Facebook

Q2 2020

29%

-6%



2019 Q1 2020 Q2 2020

Local publishers

Q2 2020

29%

+0%



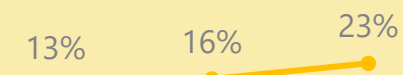
2019 Q1 2020 Q2 2020

Google Search

Q2 2020

23%

+7%

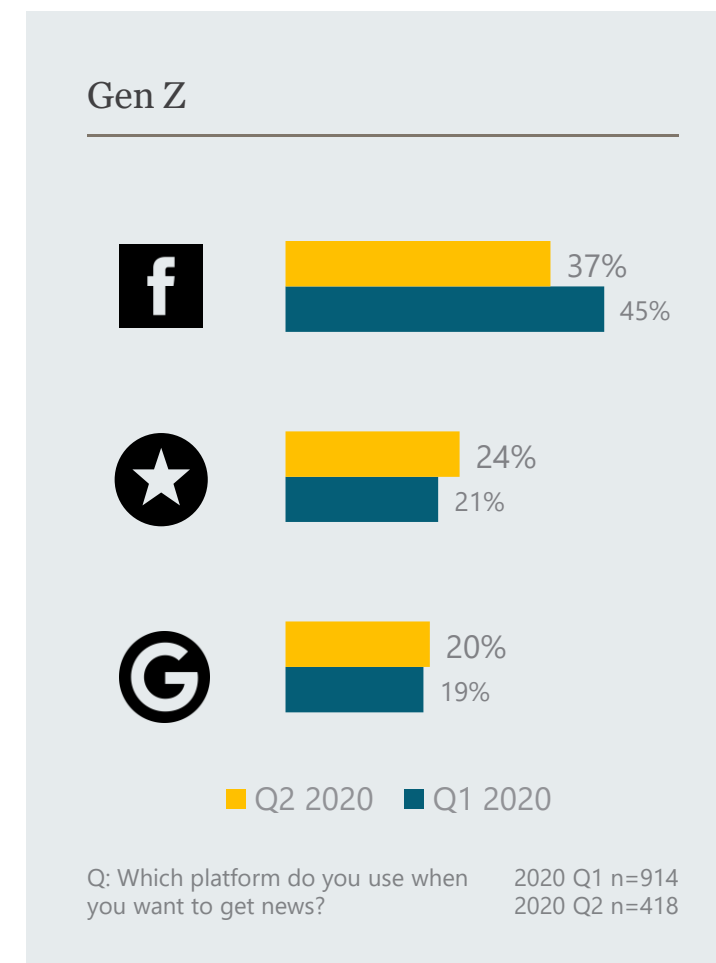
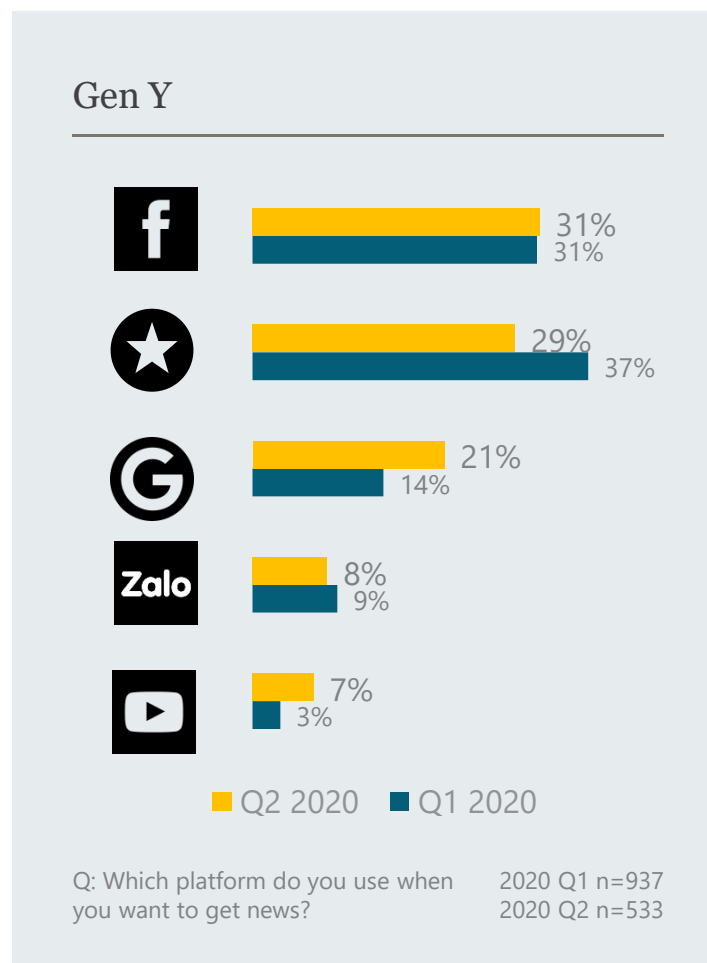
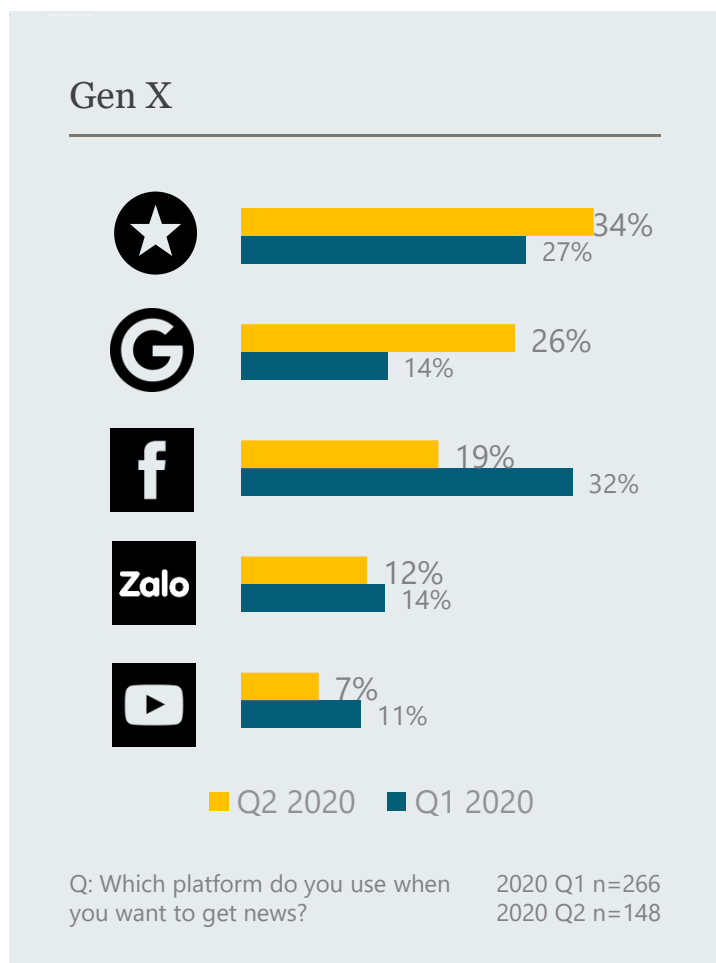


2019 Q1 2020 Q2 2020

Q: Which platform do you use when you want to get news?

2020 Q2 n=1099 2020 Q1 n=2149
2019 n=457

Gen Z is still relying on Facebook for their news, meanwhile, Gen X and Gen Y go to local publishers and Google Search to diversify their news sources



When consumers have too many options to choose from, having presence at the top of the search results is crucial for the publishers/platforms



Zalo is catching up with Facebook, while Messenger sees a drop in popularity

Facebook

Q2 2020

39%

+0%



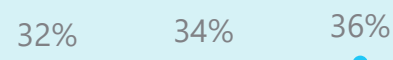
2019 Q1 2020 Q2 2020

Zalo

Q2 2020

36%

+2%



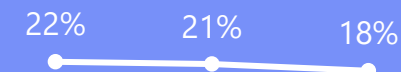
2019 Q1 2020 Q2 2020

Messenger

Q2 2020

18%

-3%



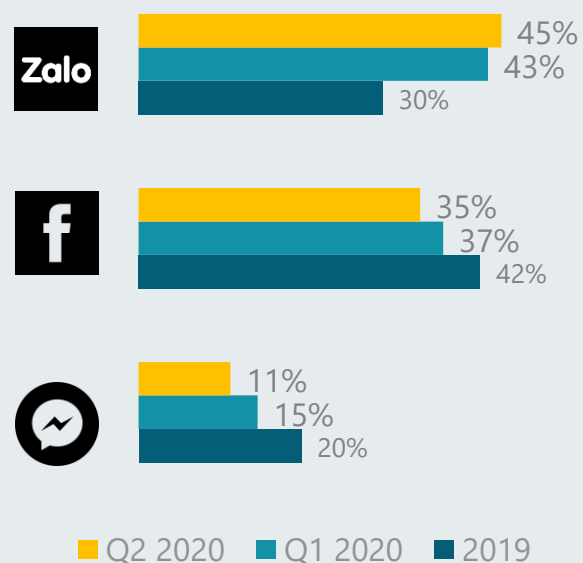
2019 Q1 2020 Q2 2020

Q: Which of the following platforms do you use to connect with friends and family?

2020 Q2 n=1099 2020 Q1 n=2149
2019 n=457

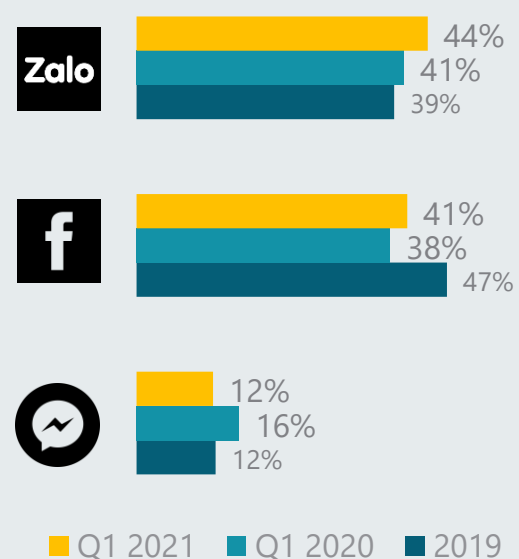
Zalo is solidifying their position among Gen X, meanwhile, Facebook and its Messenger hold on to their top spots among Gen Z

Gen X



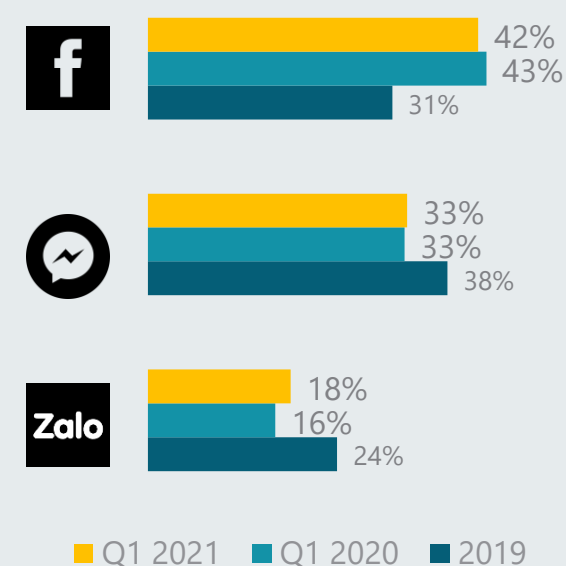
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Gen Y



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2020 Q2 n=533

Gen Z



Q: Which of the following platforms do you use to connect with friends and family? 2020 Q1 n=914
2020 Q2 n=418

Facebook is still the top platform for mindless browsing, despite not seeing any gain this quarter

Facebook

Q2 2020

50%

+0%



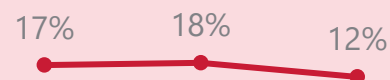
2019 Q1 2020 Q2 2020

YouTube

Q2 2020

12%

-6%



2019 Q1 2020 Q2 2020

Zalo

Q2 2020

7%

+1%

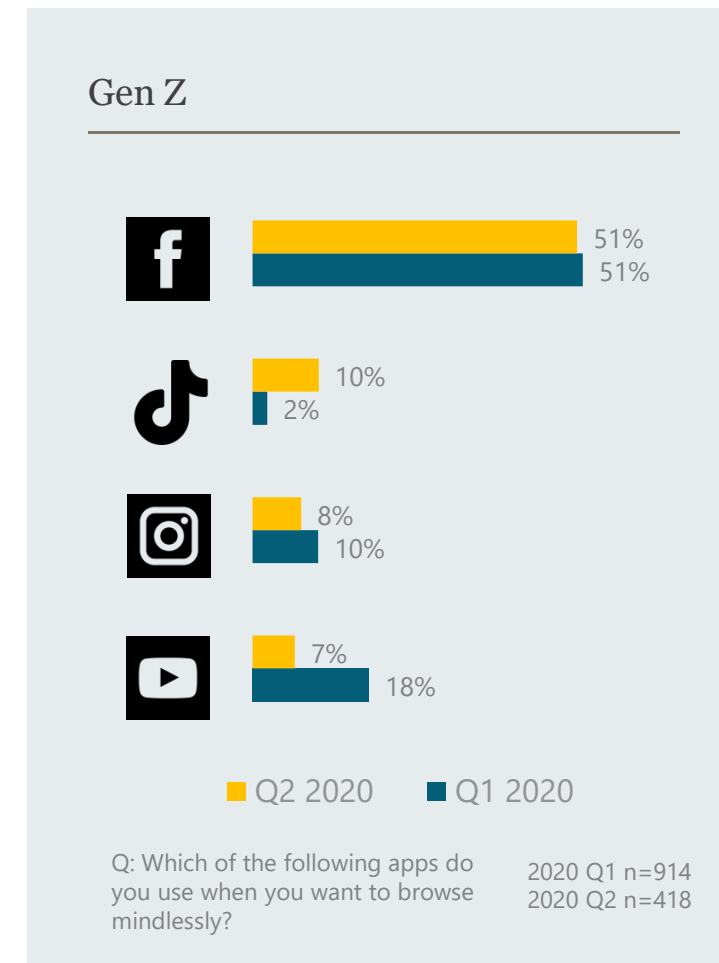
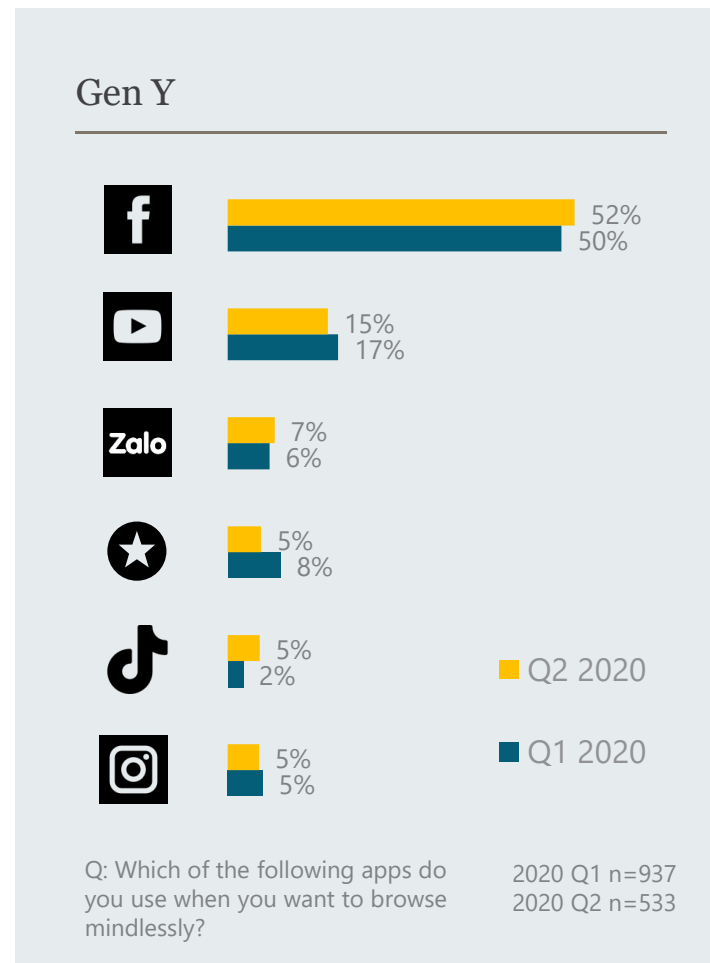
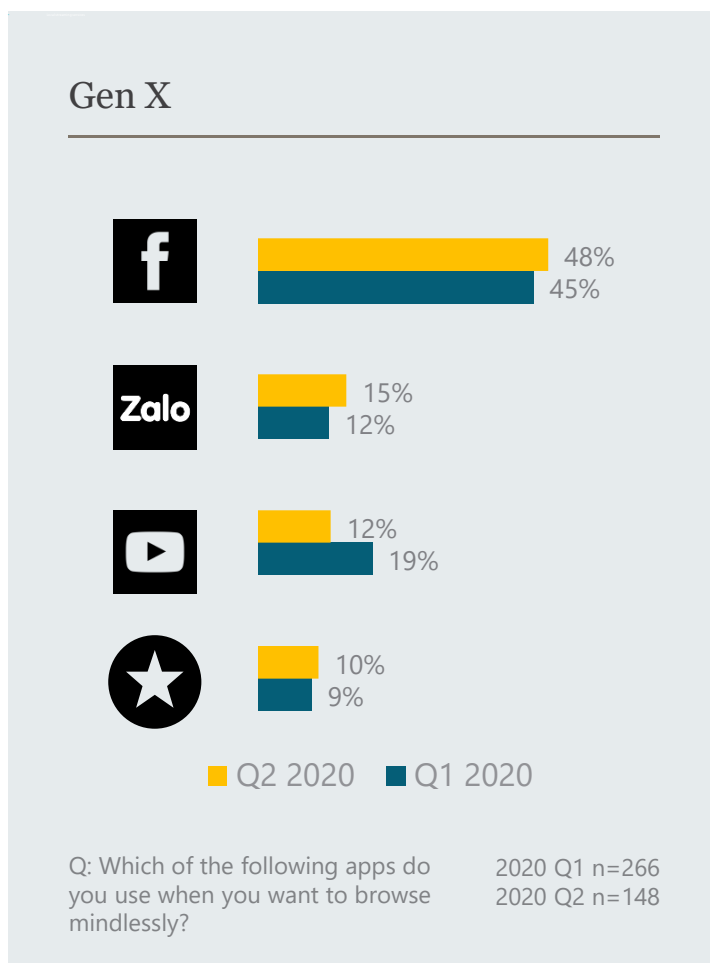


2019 Q1 2020 Q2 2020

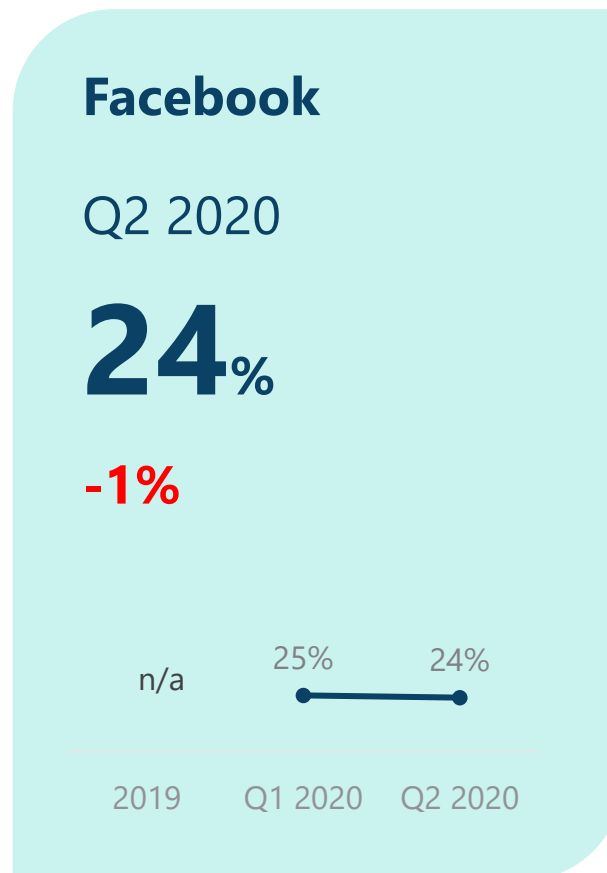
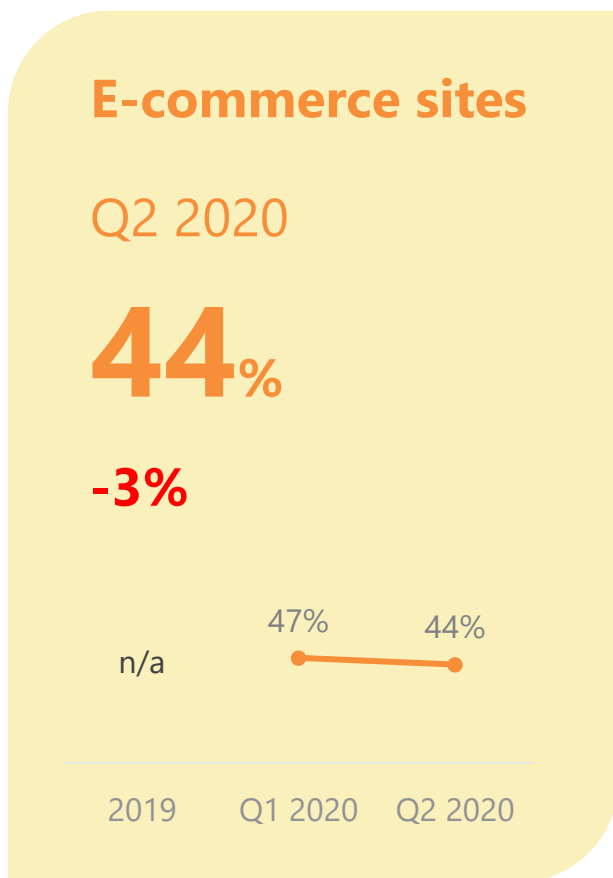
Q: Which of the following apps do you use when you want to browse mindlessly?

2020 Q2 n=1099 2020 Q1 n=2149
2019 n=457

The fight to be consumers' 2nd favourite mindless browsing app is fierce. TikTok and Instagram are competing for Gen Z's attention, while YouTube and Zalo are competing for Gen X's and Gen Y's



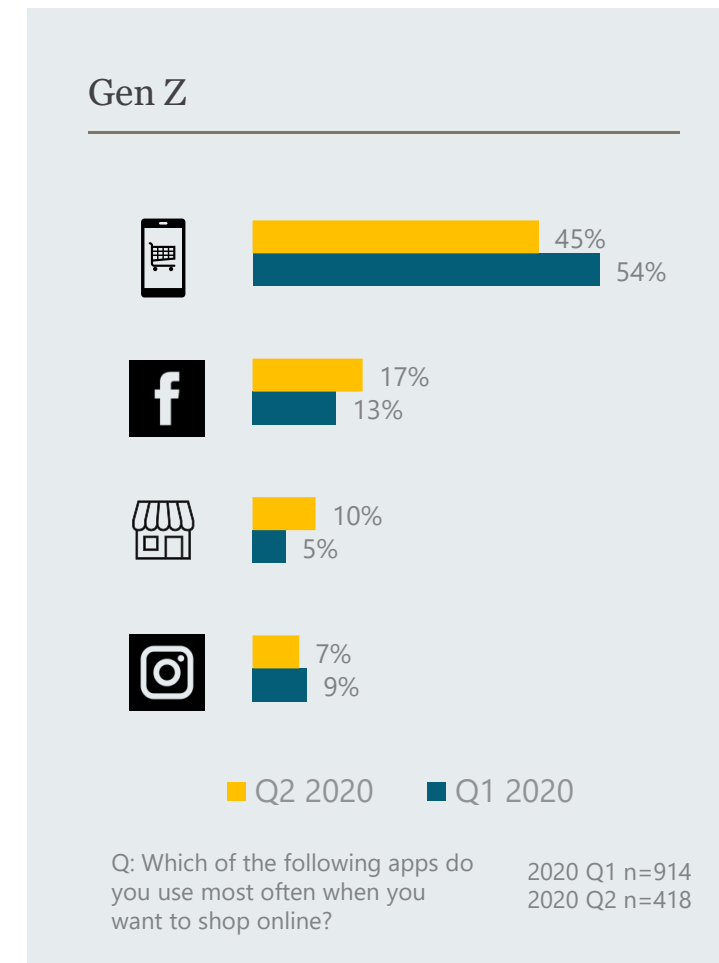
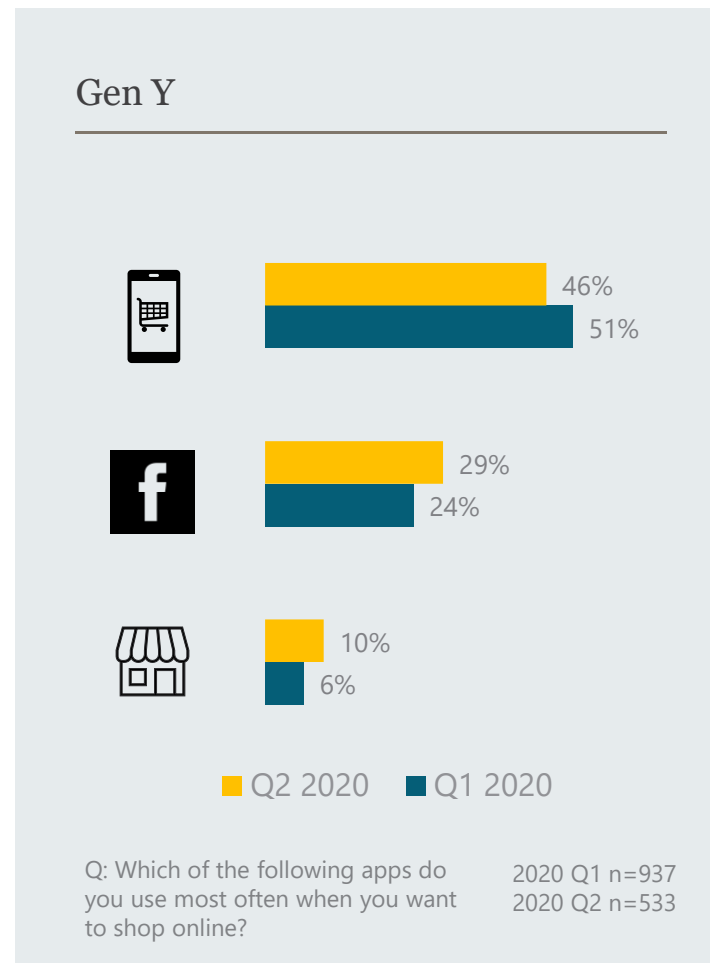
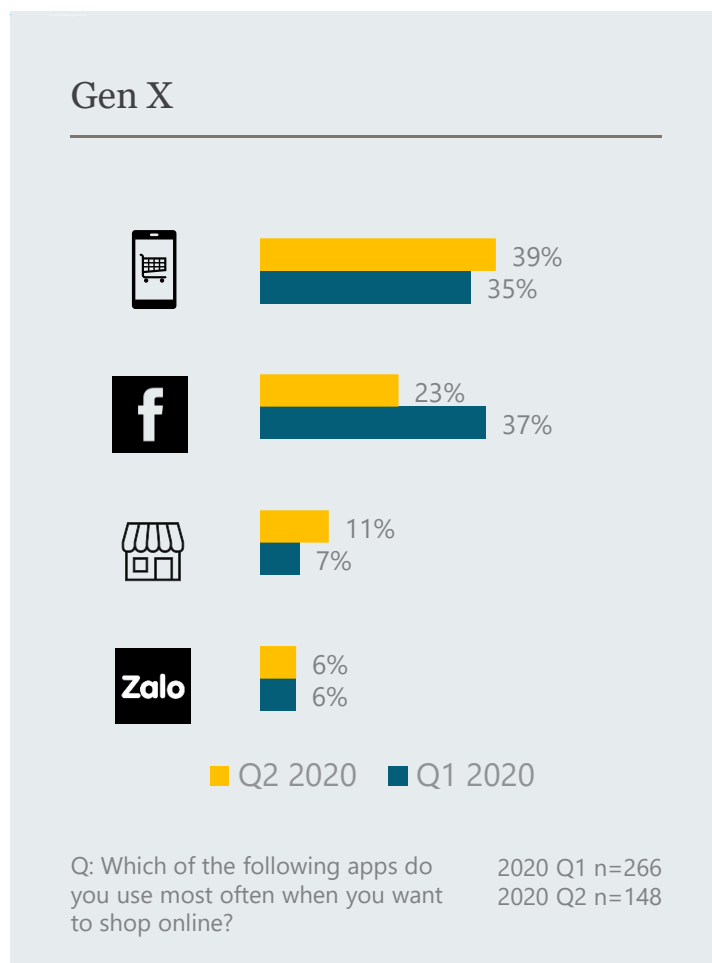
Online shopping is dominated by e-commerce sites, although brands' official sites see some gain in the 2nd quarter



Q: Which of the following apps do you use most often when you want to shop online?

2020 Q2 n=1099 2020 Q1 n=2149
2019 n=457

Facebook and brands' official websites still constitute a sizable part of the online shopping scene for all age groups



This quarter we also looked at the penetration of top e-commerce sites and ride-hailing apps among Gen X, Gen Y and Gen Z

47%



73%



46%



71%



30%



80%



GEN X

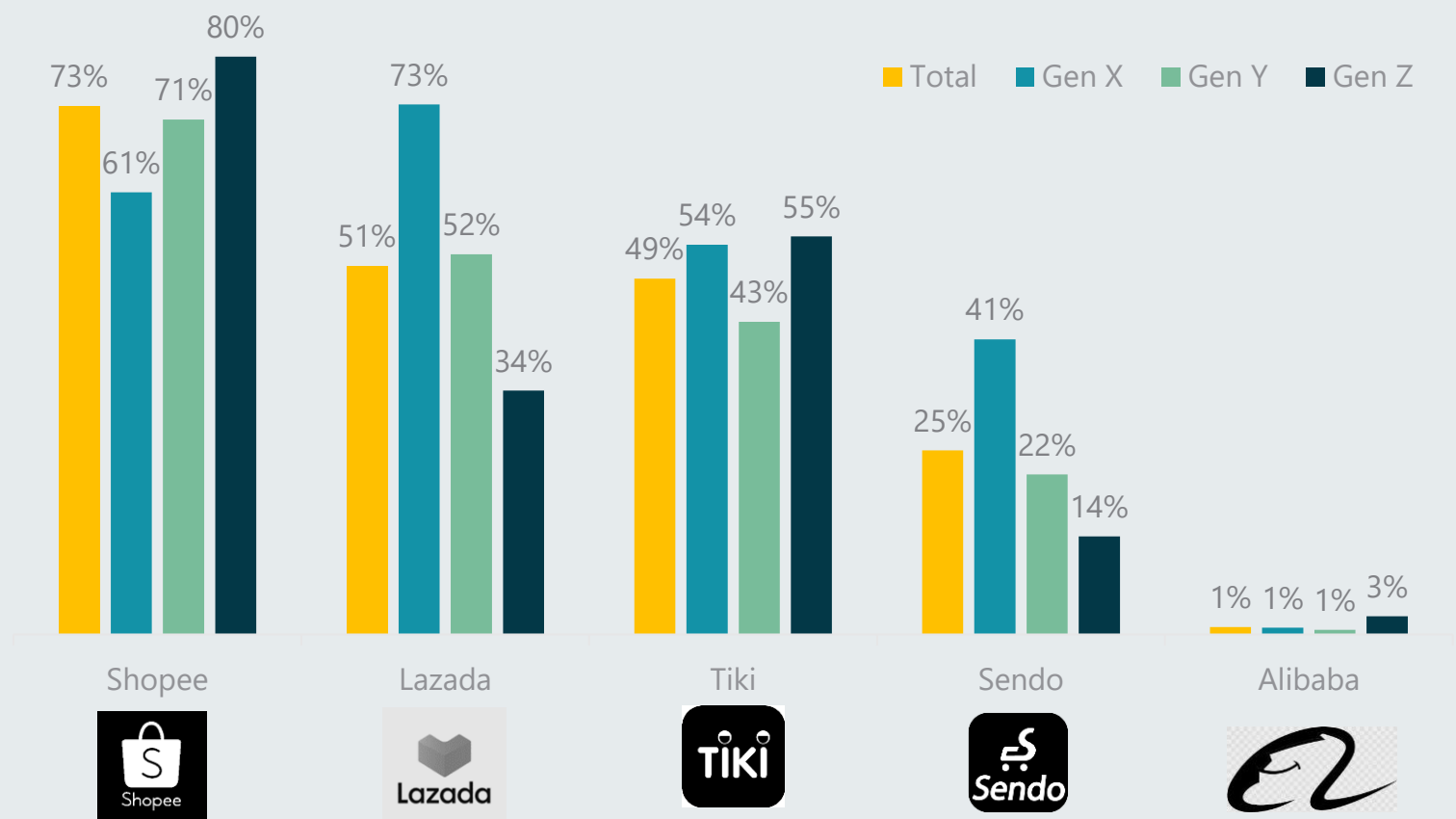


MILLENNIAL



GEN Z

E-commerce Platforms



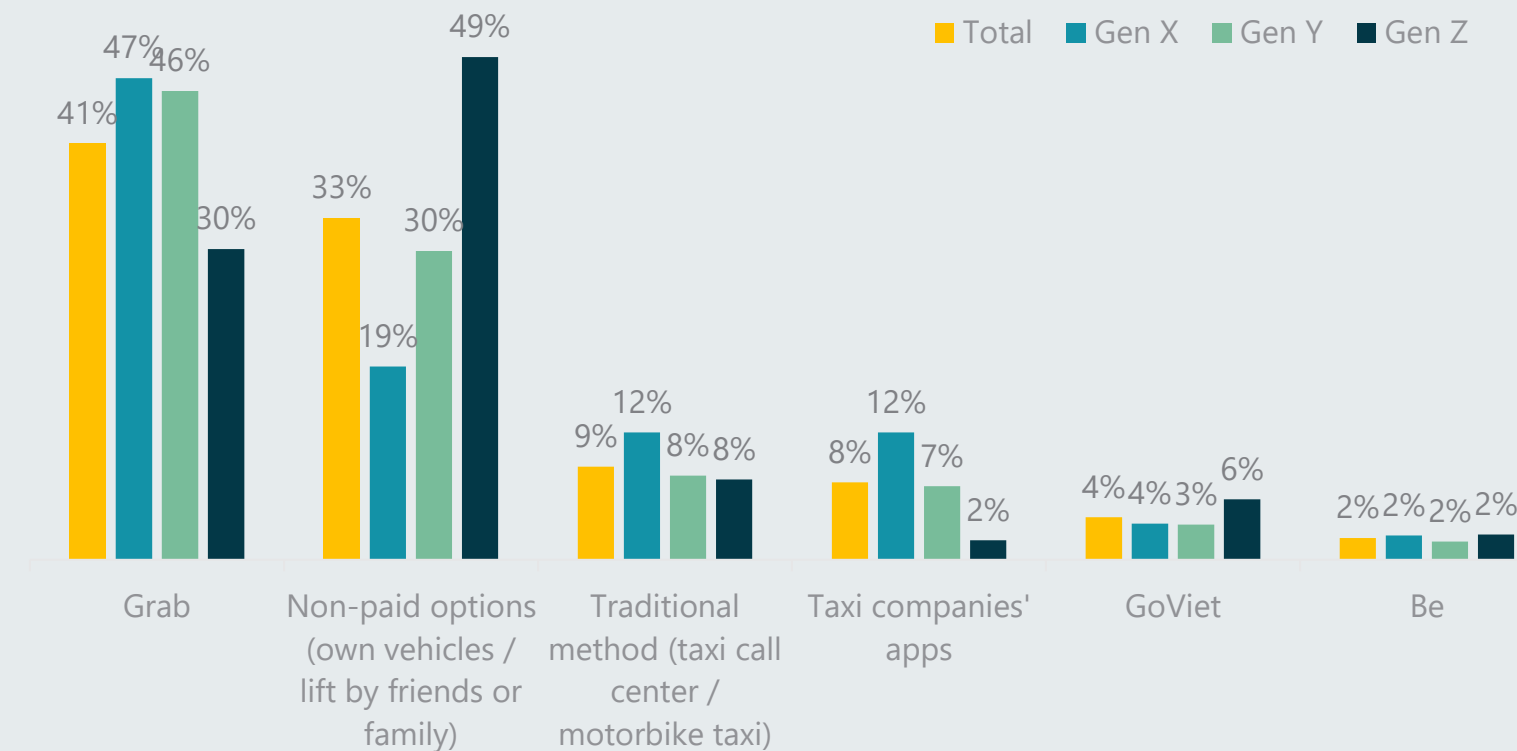
Among those who chose e-commerce as their most used online shopping platform, Shopee is the most popular choice overall.

Lazada is still the no.1 platform for Gen X, although not being very popular among Gen Z.

Q: Which of the following e-commerce sites do you use most often?

2020 Q2 n=483
2020 Q2 GenX n=58, GenY n=247, GenZ n=186

Ride-hailing Platforms



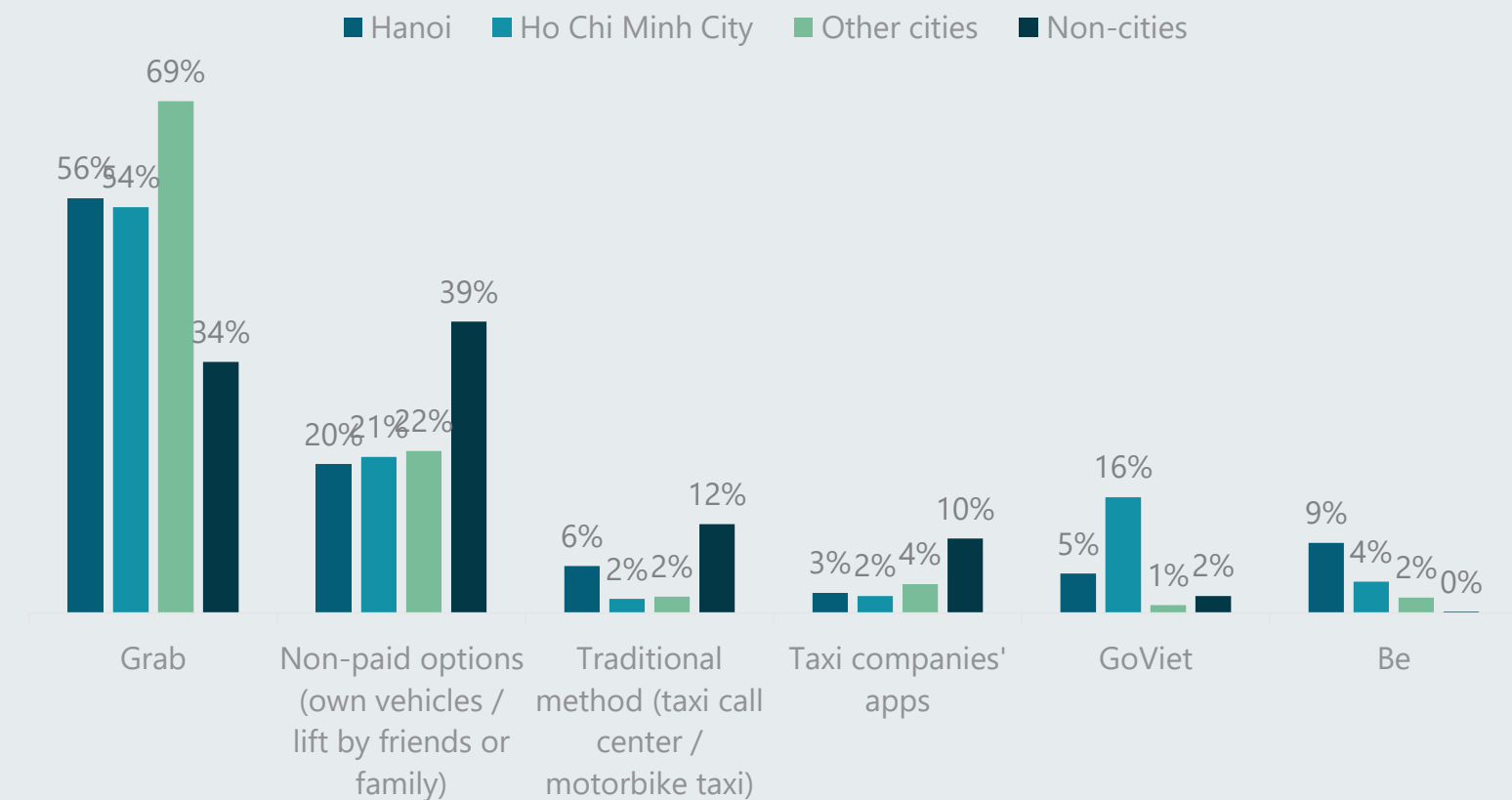
Q: Which of these ride-hailing apps do you use most often when you need to travel short distances within your town/cities?

2020 Q2 n=1093
2020 Q2 GenX n=148, GenY n=533, GenZ n=409

Grab is dominating the ride-hailing app scene, while rivals GoViet (now GoJek) and Be are still struggling to keep up with traditional taxis.

Gen X is the generation most dependent on paid rides (traditional options included), while Gen Z still rely on their own vehicles or their friends/family for travel methods.

Ride-hailing Platforms by Location



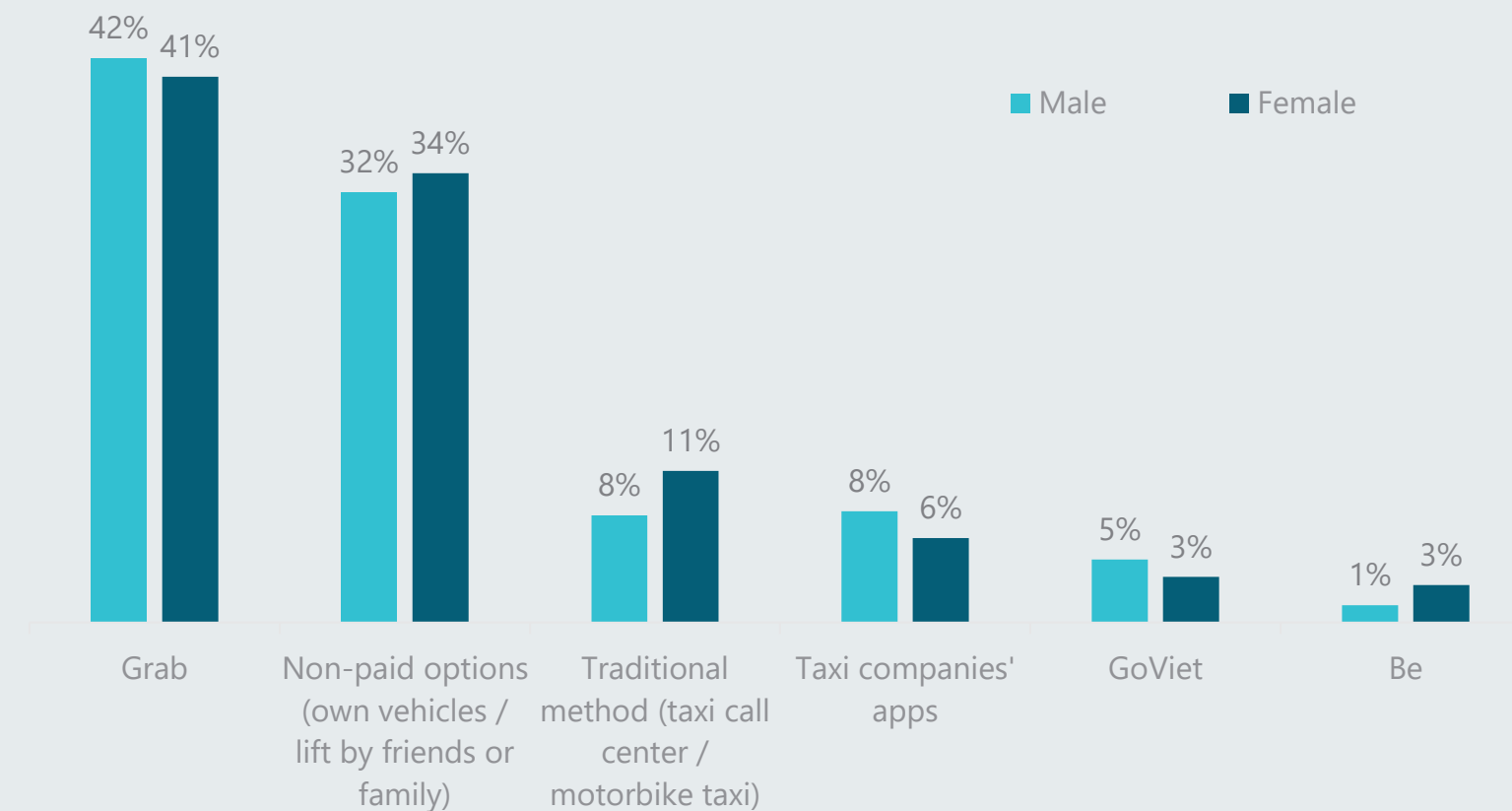
Q: Which of these ride-hailing apps do you use most often when you need to travel short distances within your town/cities?

2020 Q2 HN n=176, HCMC n=483.
 Other cities n=132, Non-cities n=305
 Other cities: Da Nang,, Can Tho, Hai Phong, Nha Trang

City dwellers are more likely to use ride-hailing apps, especially Grab. Non-cities residents rely on non-paid options and traditional methods, including apps from taxi companies.

GoViet (now GoJek) is the second most popular ride-hailing app in Ho Chi Minh City, while in Hanoi, this position belongs to Be.

Ride-hailing Platforms by Gender



Q: Which of these ride-hailing apps do you use most often when you need to travel short distances within your town/cities?

2020 Q2 n=1093
2020 Q2 Male n=330, Female n=769

The ride-hailing market are currently not segmented by genders. However, it seems women are not inclined to adopt taxi apps as much as relying on traditional methods.

KEY FINDINGS

- TikTok sees gain for all generations for 2 quarters consecutively, with 56% of Gen Z now using the platform.
- Facebook is still the primary app for all generations, Zalo solidified its spot among Gen X, but loses grip on Gen Z to YouTube and Instagram.
- YouTube dominates the music/entertainment videos scenes, however, when it comes to short videos, Facebook and TikTok are taking over.
- When there are many choices available, as in the case of news publishers and movie streaming sites, consumers are increasingly turning to Google Search to browse their options.
- Grab dominates the ride-hailing scene, Gen X is the group most dependent on paid rides, only 19% using their own vehicles or get a lift from friends and family.

WHAT IT MEANS FOR ADVERTISERS

- Campaigns targeting young consumers need to consider TikTok and Instagram, meanwhile, older consumers are more likely to be reached on Facebook and Zalo.
- Contents need to be built with different formats and platform experience in mind, as there is not yet one platform dominating all videos experience.
- When the market becomes too fragmented, being present at the top of search results is important as consumers turn to Google Search to take their pick.
- Gen X can be reached via ride-hailing as well as taxi apps/traditional taxis. Campaigns targeting this group should consider these apps as well as the vehicles themselves.



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