

# The Connected Consumer Q2 2021

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PREPARED BY DECISION LAB

JULY 2021

# Content

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## Introduction

TRACKING THE CONNECTED CONSUMERS

THE CONNECTED CONSUMERS' PROFILE

## Overview

## Platforms by functions

## Key findings & What it means for Advertisers

## Our solutions

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# Introduction

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# 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 2021 – JUN 2021

SAMPLE COLLECTION PERIOD

1833

TOTAL SAMPLE SIZE

JAN 2021 – MAR 2021

SAMPLE COLLECTION PERIOD

2028

TOTAL SAMPLE SIZE

OCT 2020 – DEC 2020

SAMPLE COLLECTION PERIOD

884

TOTAL SAMPLE SIZE

JULY 2020 – SEP 2020

SAMPLE COLLECTION PERIOD

1655

TOTAL SAMPLE SIZE

APR 2020 – JUN 2020

SAMPLE COLLECTION PERIOD

1099

TOTAL SAMPLE SIZE

DEC 2019 – FEB 2020

SAMPLE COLLECTION PERIOD

2149

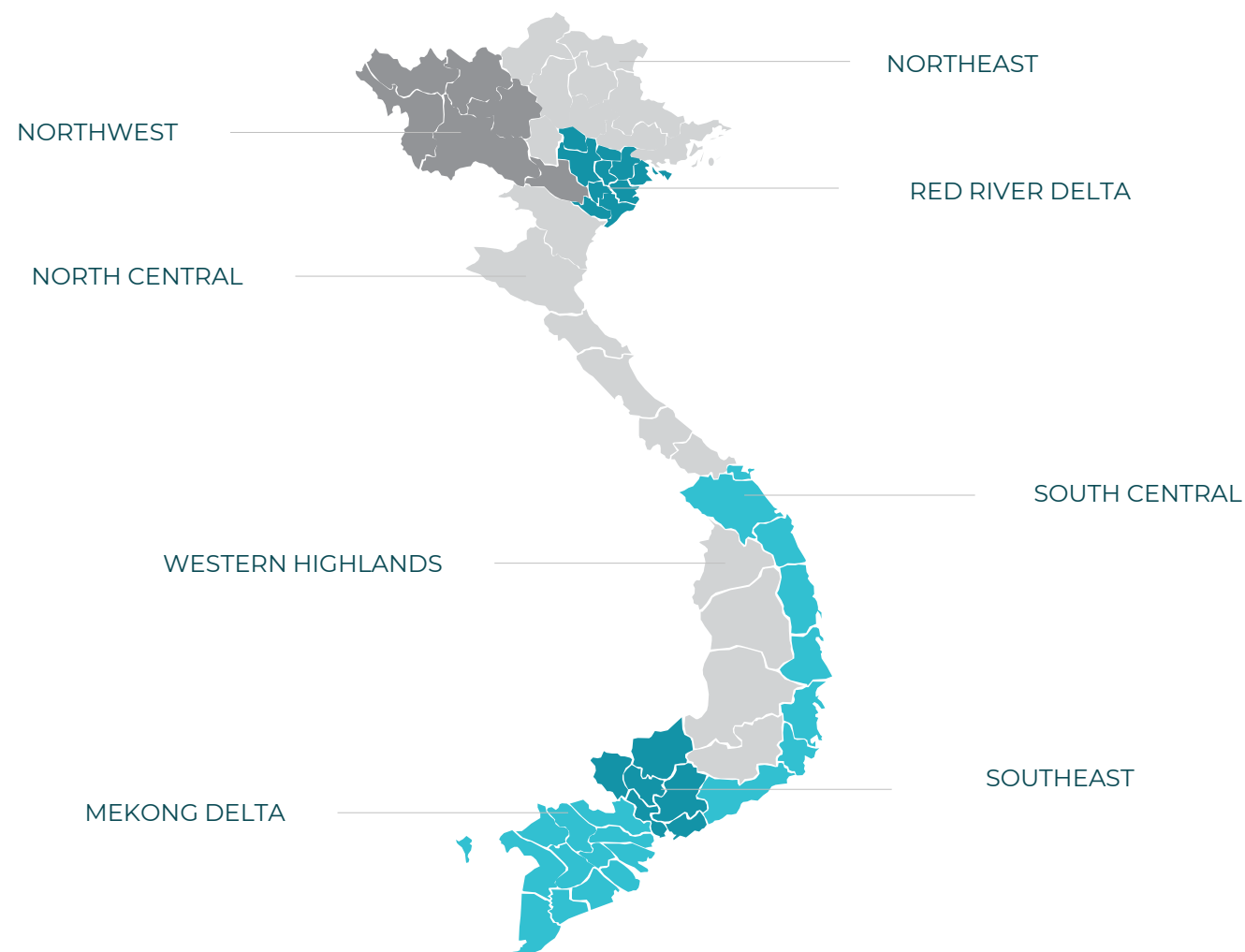
TOTAL SAMPLE SIZE

AUG 2019 – SEP 2019

SAMPLE COLLECTION PERIOD

457

TOTAL SAMPLE SIZE



# The Connected Consumers' profiles



**GEN Z**

**BORN BETWEEN 1997 – 2005**

**AGE 16 - 24**



**GEN Y (MILLENNIALS)**

**BORN BETWEEN 1981 – 1996**

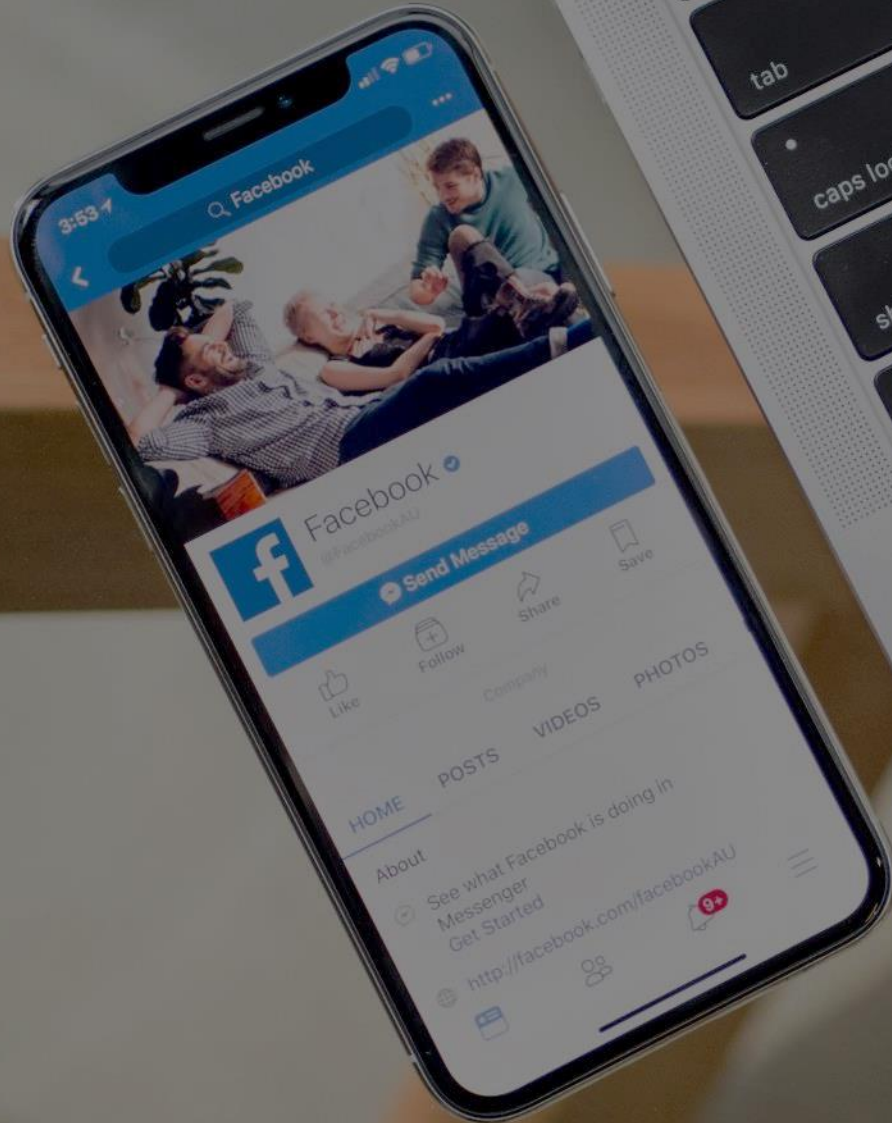
**AGE 25 - 40**



**GEN X**

**BORN BETWEEN 1960 – 1980**

**AGE 41 - 61**



# The Top platforms

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TOP PLATFORMS

TOP PRIMARY PLATFORMS

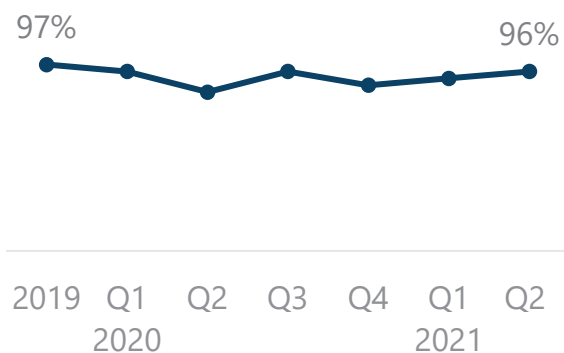
PLATFORMS USERS CAN'T LIVE WITHOUT

MULTI-PLATFORM USAGE

# Facebook, Zalo, and YouTube remain the top 3 most popular platforms in Quarter 2/2021.

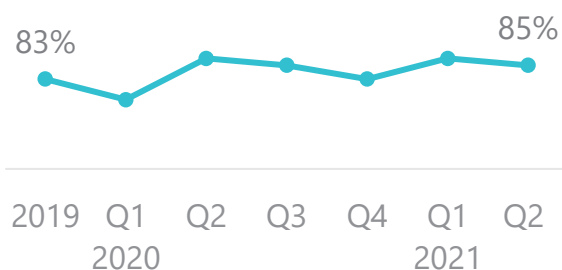
**96%**

use **facebook**



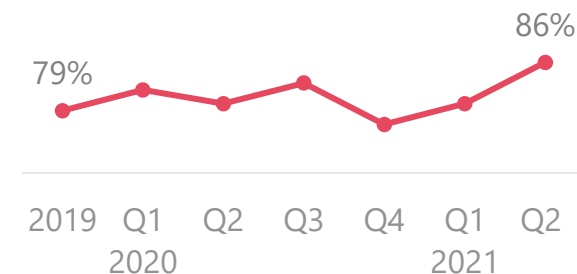
**85%**

use **Zalo**



**86%**

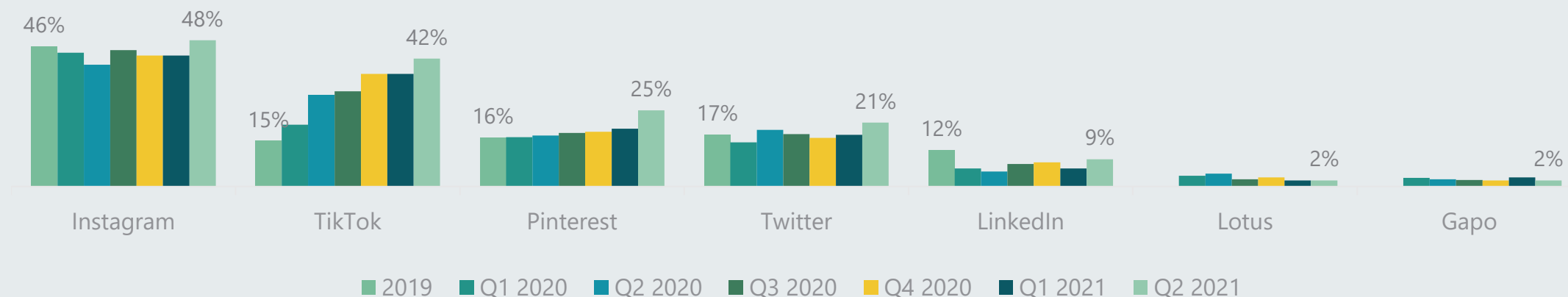
use **YouTube**





Besides Facebook and YouTube, all major social media platforms have experienced growth in popularity in Vietnam compared to last quarter.

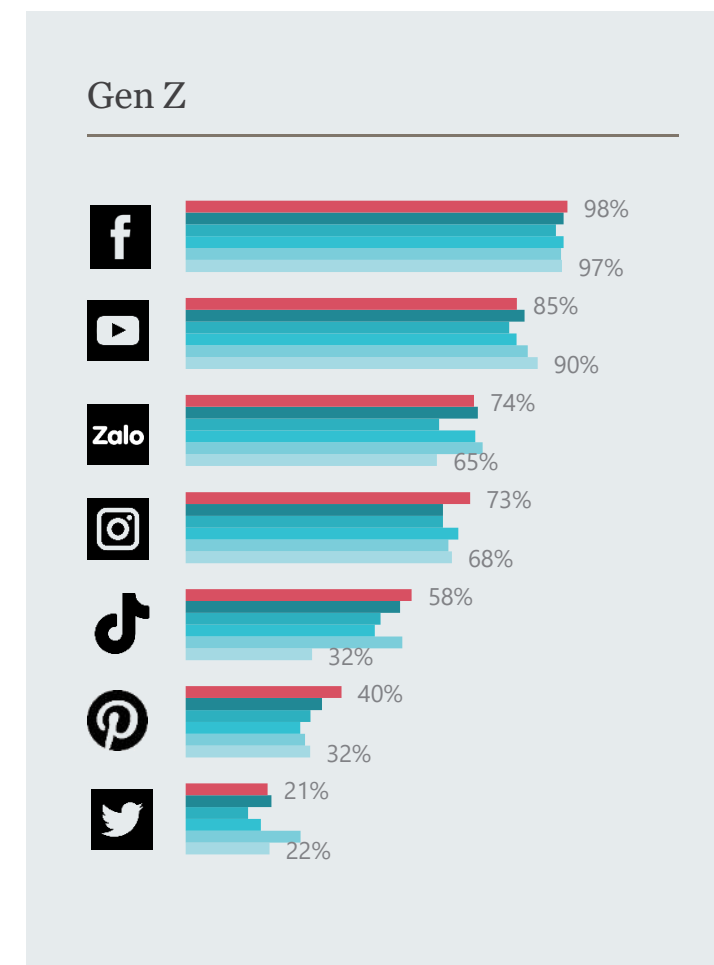
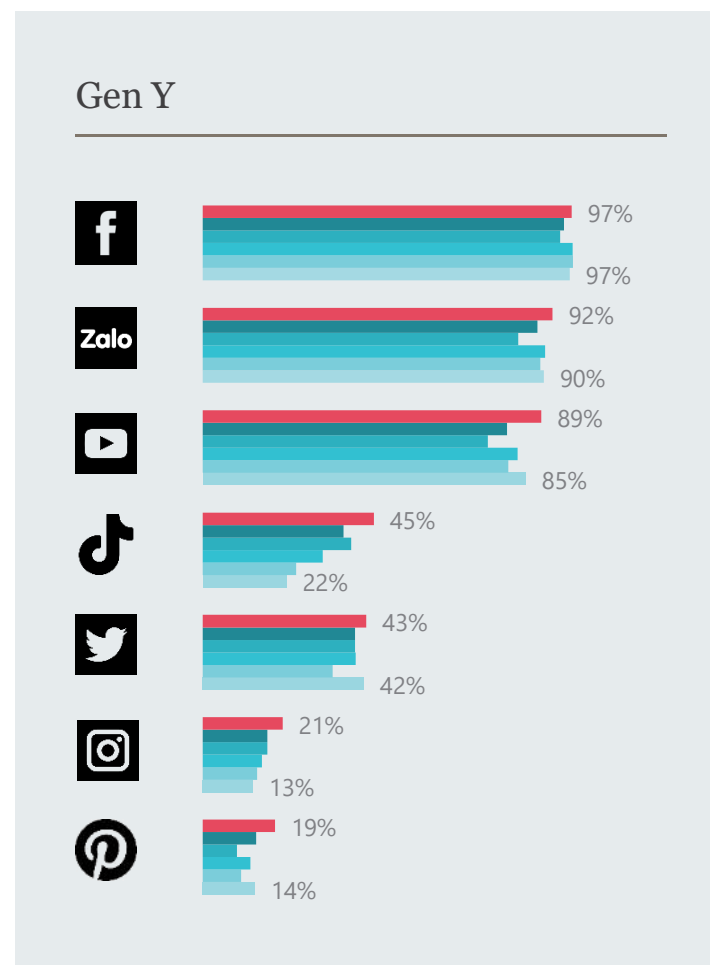
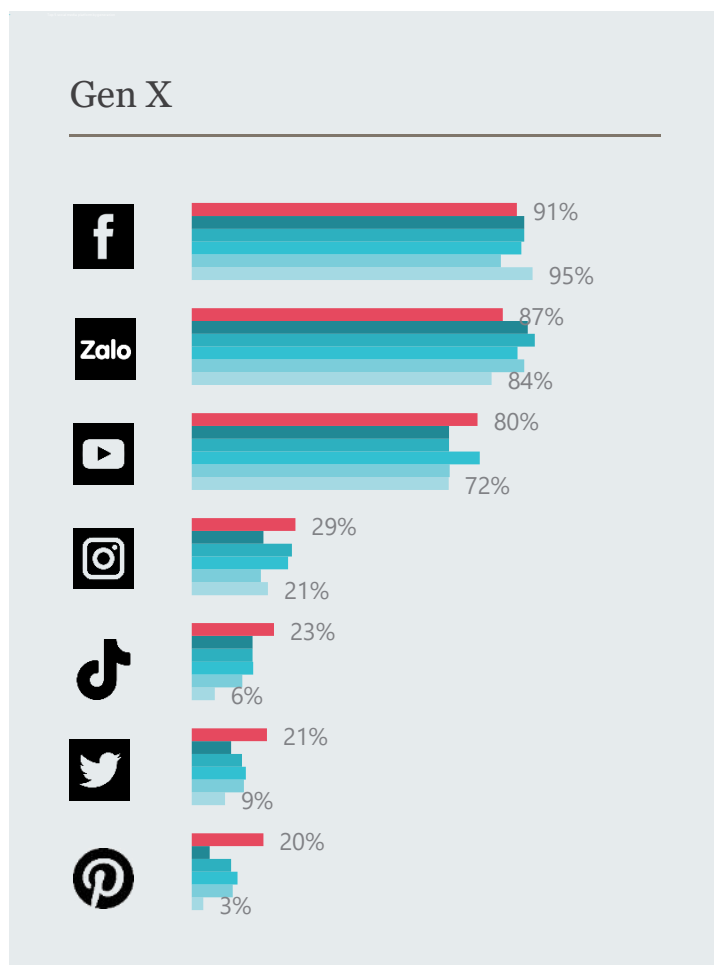
### Other popular social media platforms



2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149, 2019 n=457

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

# Social media platforms' popularity grows more strongly among Gen X & Y consumers than among Gen Z consumers.



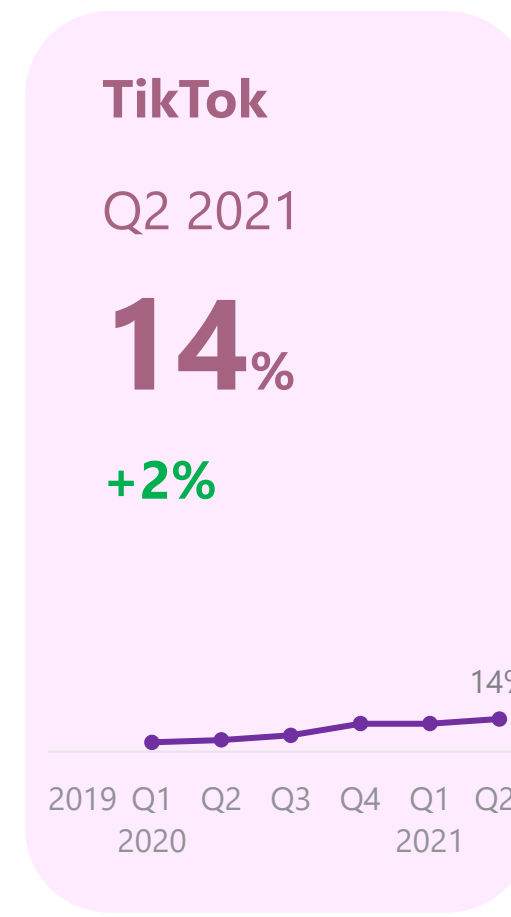
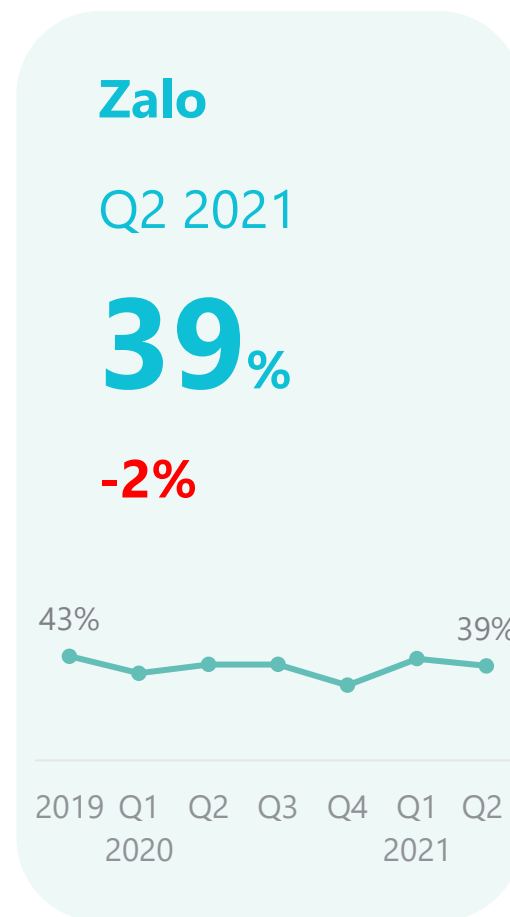
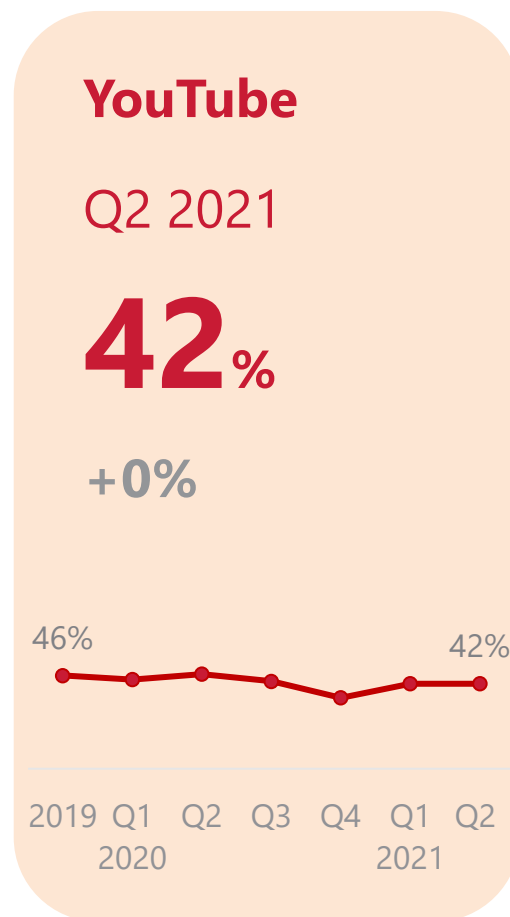
Q: Which of the following social media platforms are you using?  
(Choose all that apply)

■ Q1 2020 
 ■ Q2 2020 
 ■ Q3 2020 
 ■ Q4 2020 
 ■ Q1 2021 
 ■ Q2 2021

\*Figures in this chart were most recently updated on August 12, 2021

2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149

Not only are Facebook, YouTube, Zalo, and TikTok popular, but they are also platforms Vietnamese consumers cannot live without.

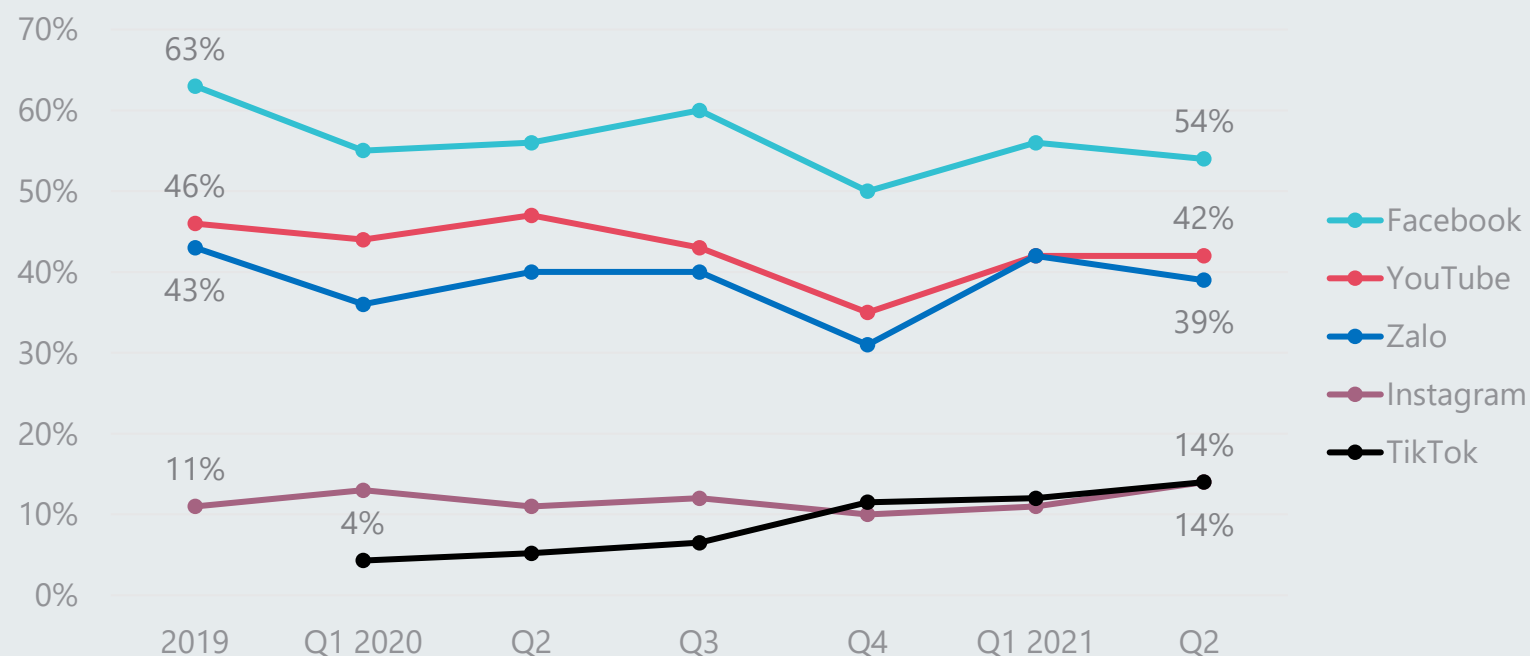


Q: Which of the following social media platforms are you unable to live without? (Choose all that apply)

2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149, 2019 n=457

# TikTok progresses, while Instagram stagnates as Vietnamese consumers' fourth-most essential apps

Platforms Vietnamese consumers cannot live without

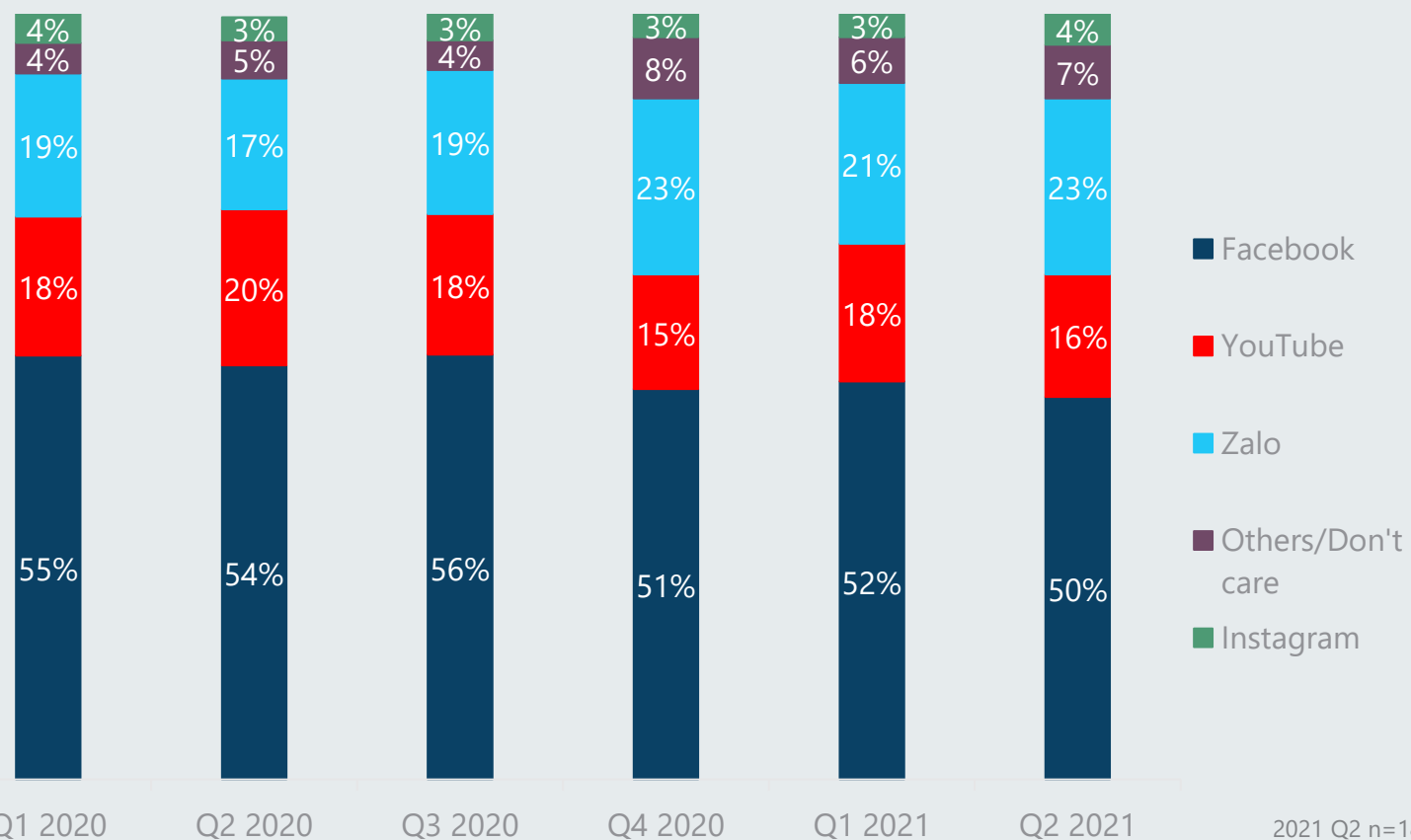


2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149, 2019 n=457

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

TikTok has grown more essential to Vietnamese consumers, sharing the fourth spot with Instagram in Quarter 2/2021.

## Consumers' primary applications

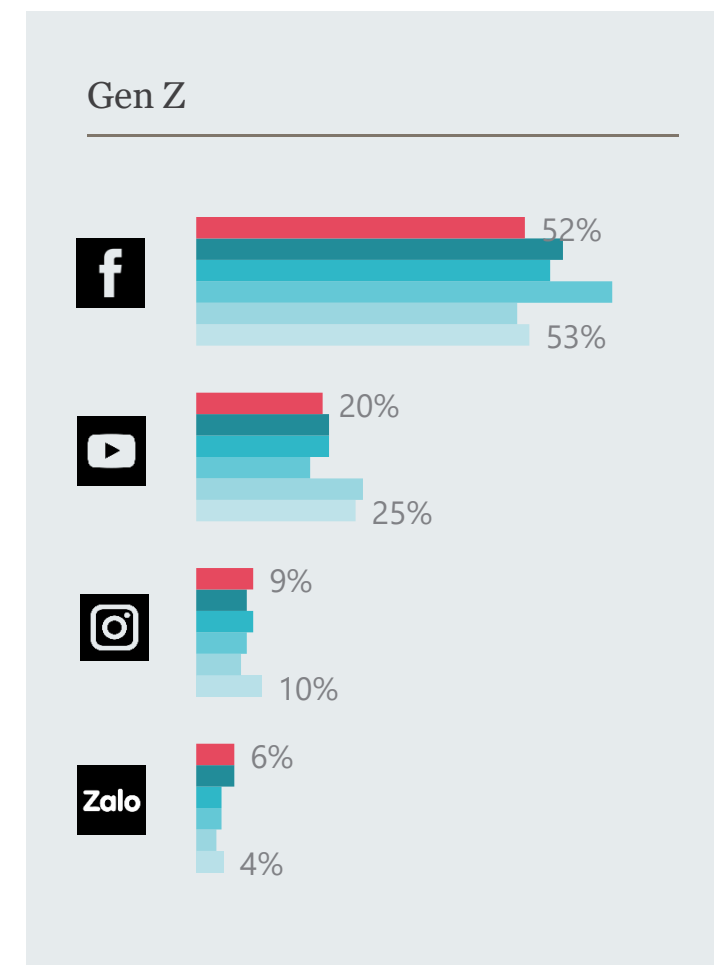
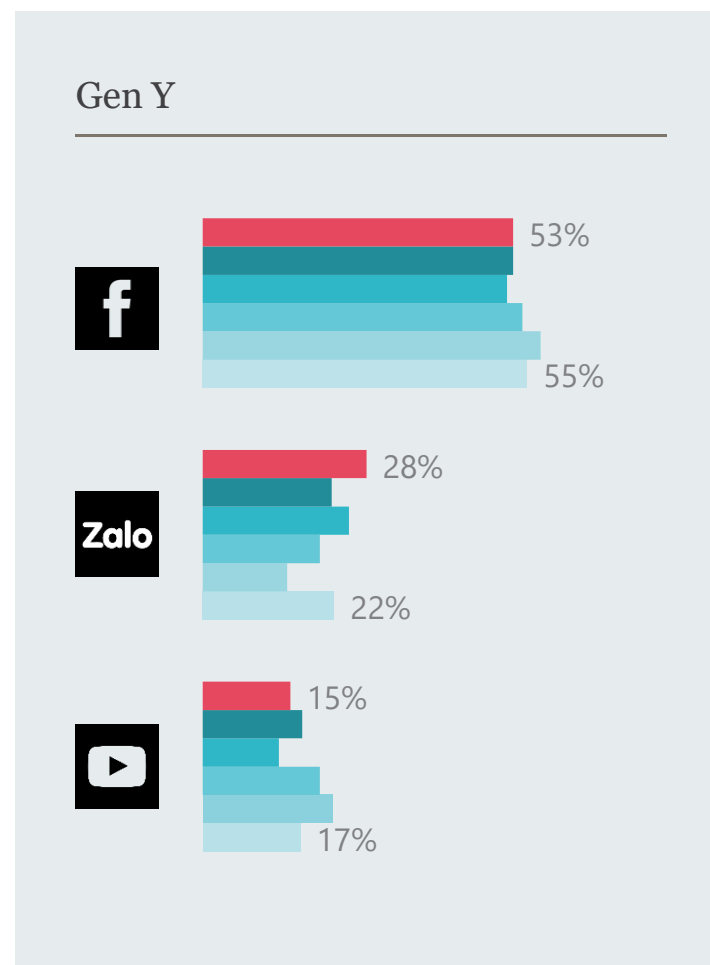
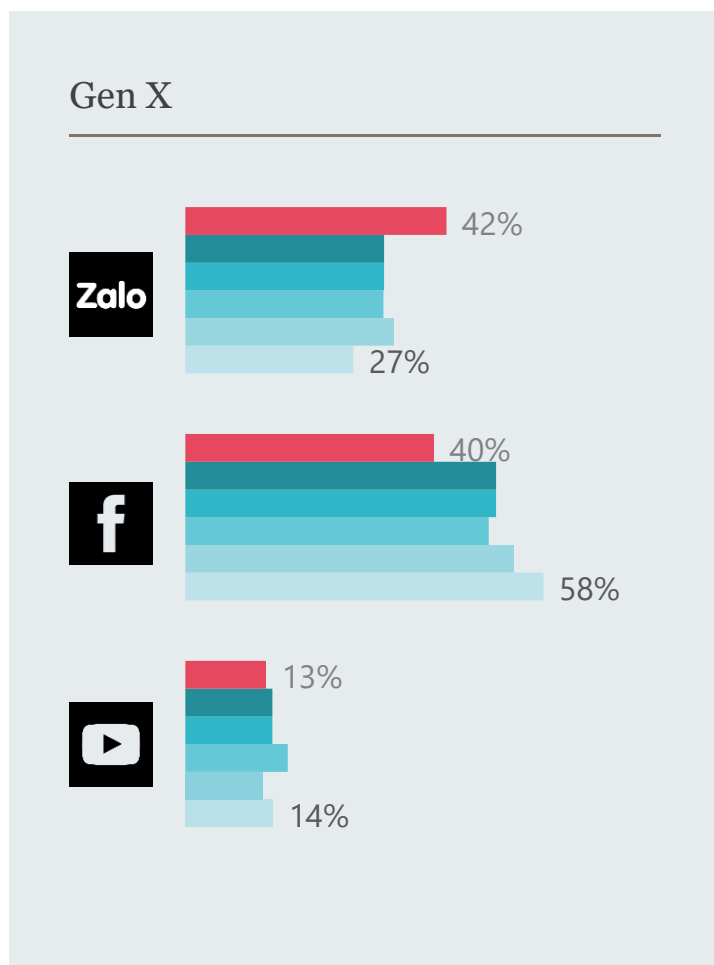


Generally, top social media platforms have solidified their positions as primary apps for Vietnamese users.

Q: What is your one primary app?

2021 Q2 n=1833  
 2021 Q1 n=1422  
 2020 Q4 n=582  
 2020 Q3 n=1655  
 2020 Q2 n=1099  
 2020 Q1 n=2149

# Zalo is voted as Gen X's primary app for the first time, while Facebook's popularity is fading away across age groups.



Q: What is your one primary app?

■ Q1 2020 
 ■ Q2 2020 
 ■ Q3 2020 
 ■ Q4 2020 
 ■ Q1 2021 
 ■ Q2 2021 
 2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149, 2019 n=457

Quarter 2/2021 sees a dramatic increase in the number of multi-platform Gen X & Y users, while Gen Z remains the most digitally present age group.



GEN X



MILLENNIAL



GEN Z

Use 3 apps	<b>52%</b>	<b>35%</b>	<b>28%</b> ▲ 2%
Use 4+ apps	<b>48%</b> ▲ 13%	<b>65%</b> ▲ 10%	<b>72%</b>

Q: Which of the following social media apps do you use? Check all that apply.

Gen X n=168  
 Gen Y n=482  
 Gen Z n=1183



# Platforms by popular functions

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MUSIC AND ENTERTAINMENT VIDEOS

SHORT VIDEOS

MUSIC/ AUDIO CONTENT

MOVIE STREAMING



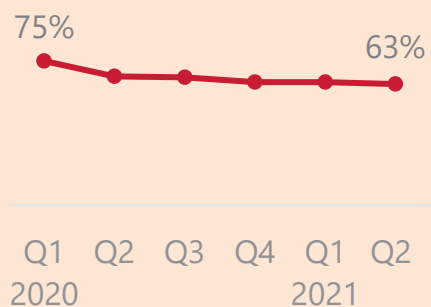
TikTok is in its nascent phase of becoming the go-to application for music and entertainment videos, a category dominated by YouTube.

## YouTube

Q2 2021

**63%**

**-1%**



## Facebook

Q2 2021

**12%**

**-1%**



## TikTok

Q2 2021

**8%**

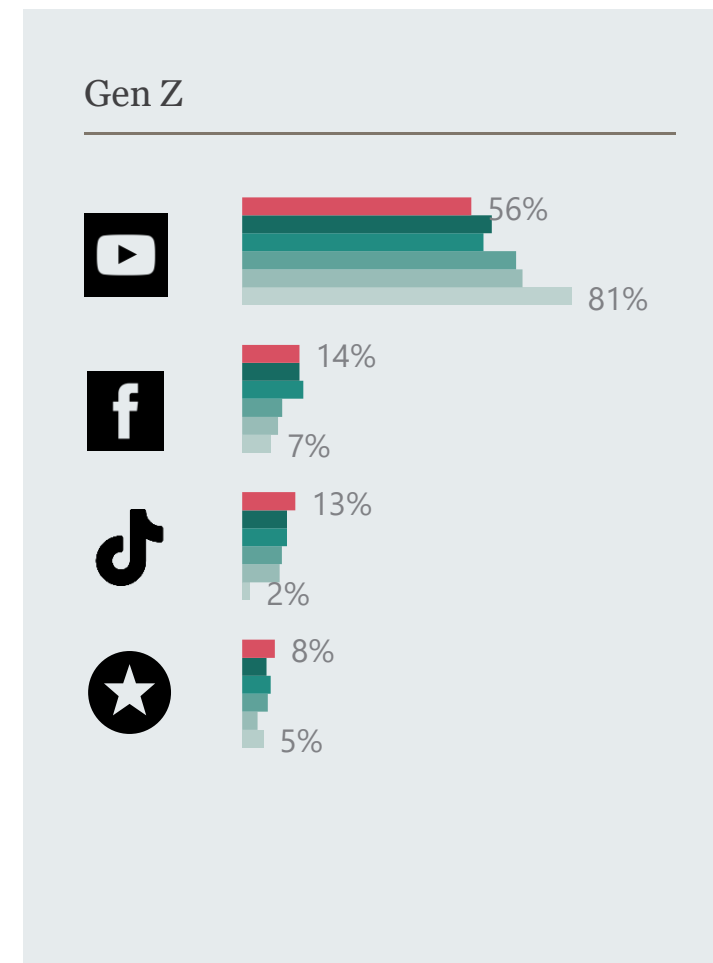
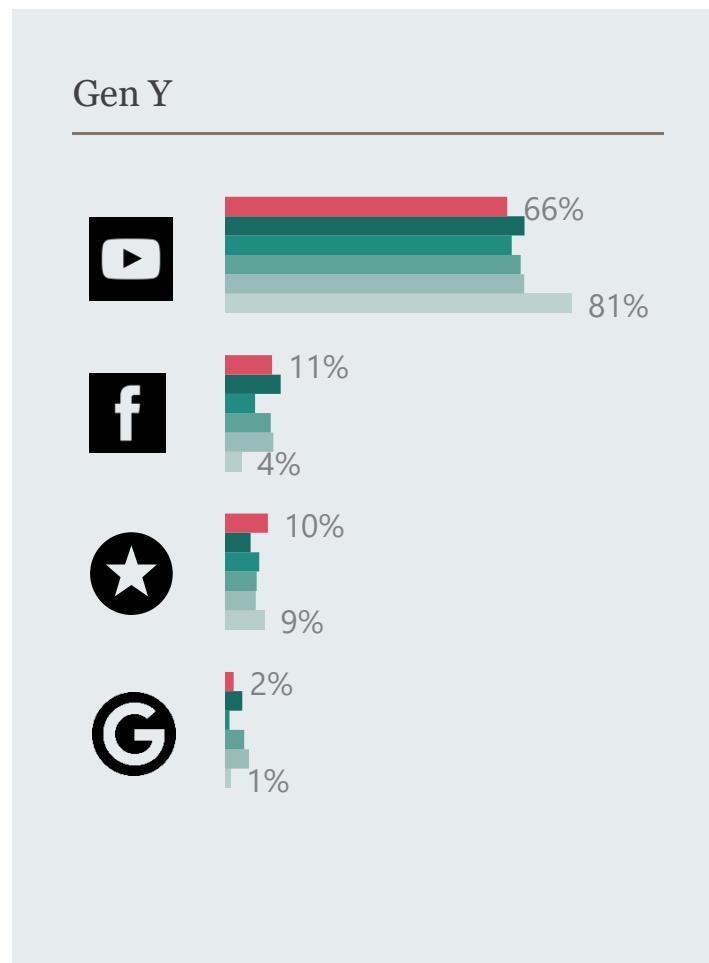
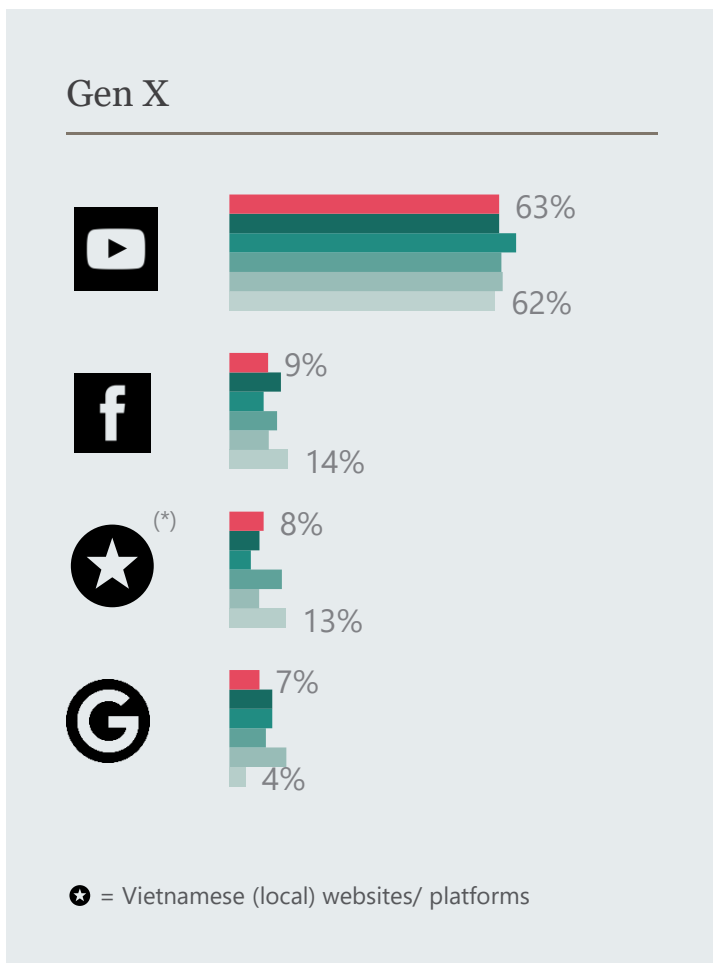
**+2%**



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

2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149

# TikTok is becoming more relevant for Gen Z's music and entertainment needs, while YouTube's position has stabilized.



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

■ Q1 2020 ■ Q2 2020 ■ Q3 2020 ■ Q4 2020 ■ Q1 2021 ■ Q2 2021

2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149

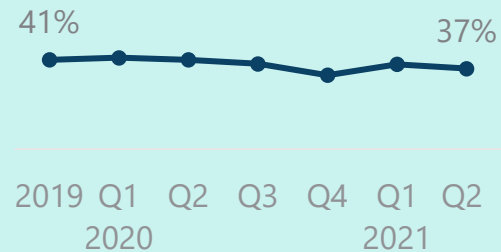
Despite efforts by Facebook and YouTube, TikTok is on a steady rise in the short videos category.

## Facebook

Q2 2021

**37%**

**-2%**



## YouTube

Q2 2021

**27%**

**-3%**

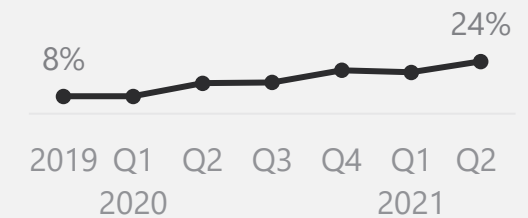


## TikTok

Q2 2021

**24%**

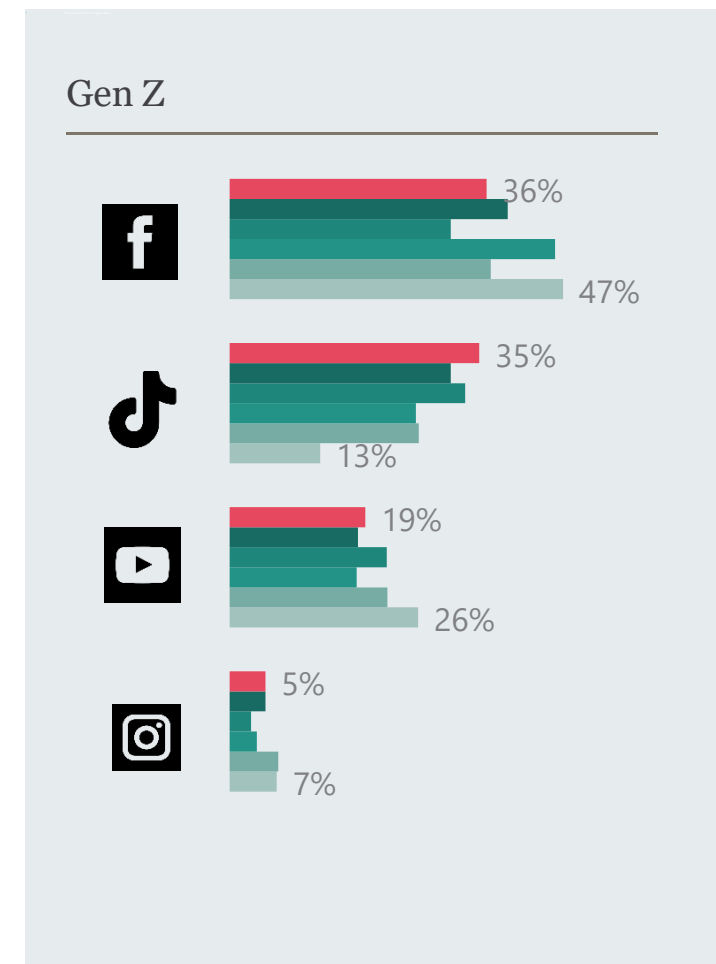
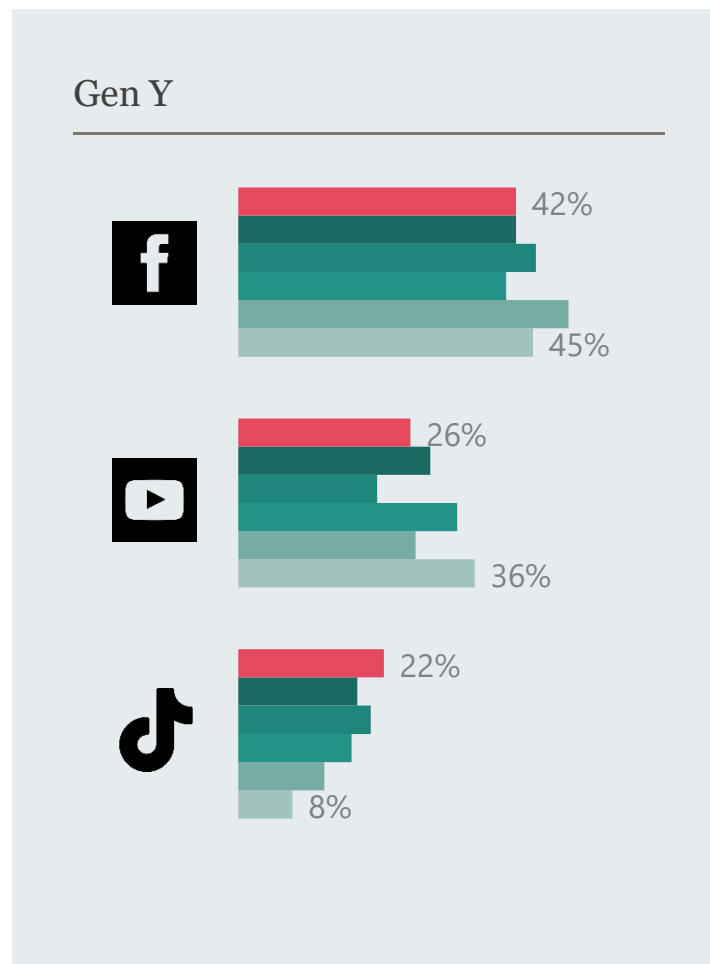
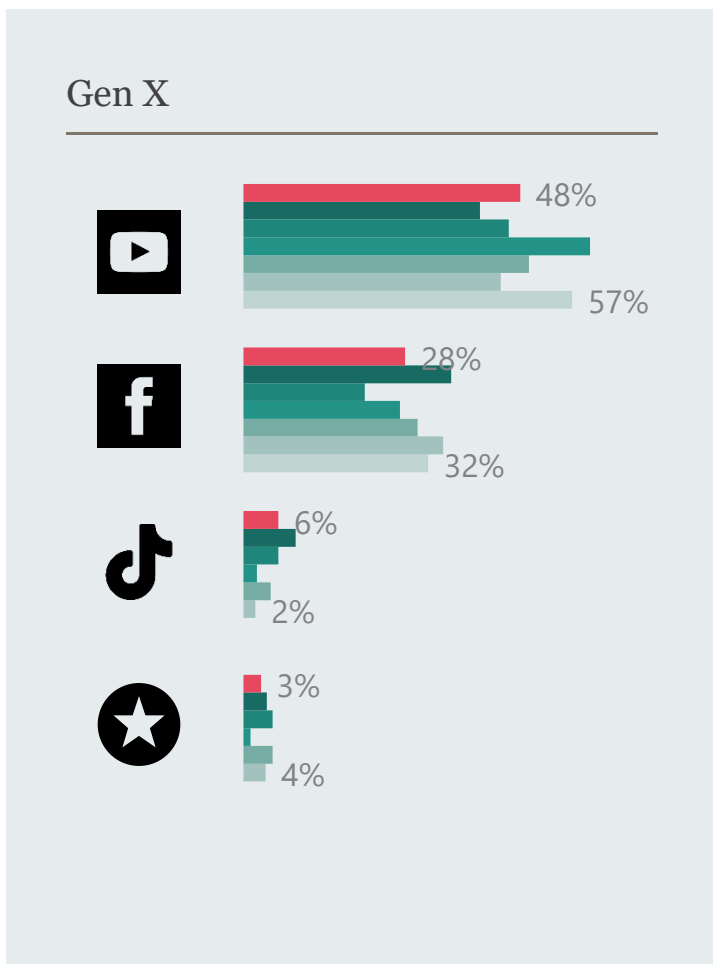
**+5%**



Q: Which app do you use most often when watching short videos?

2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884,  
2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149,  
2019 n=457

# In the short videos category, TikTok's rise parallels Facebook's fall especially among Gen Y & Z. YouTube maintains its relevance across age groups.

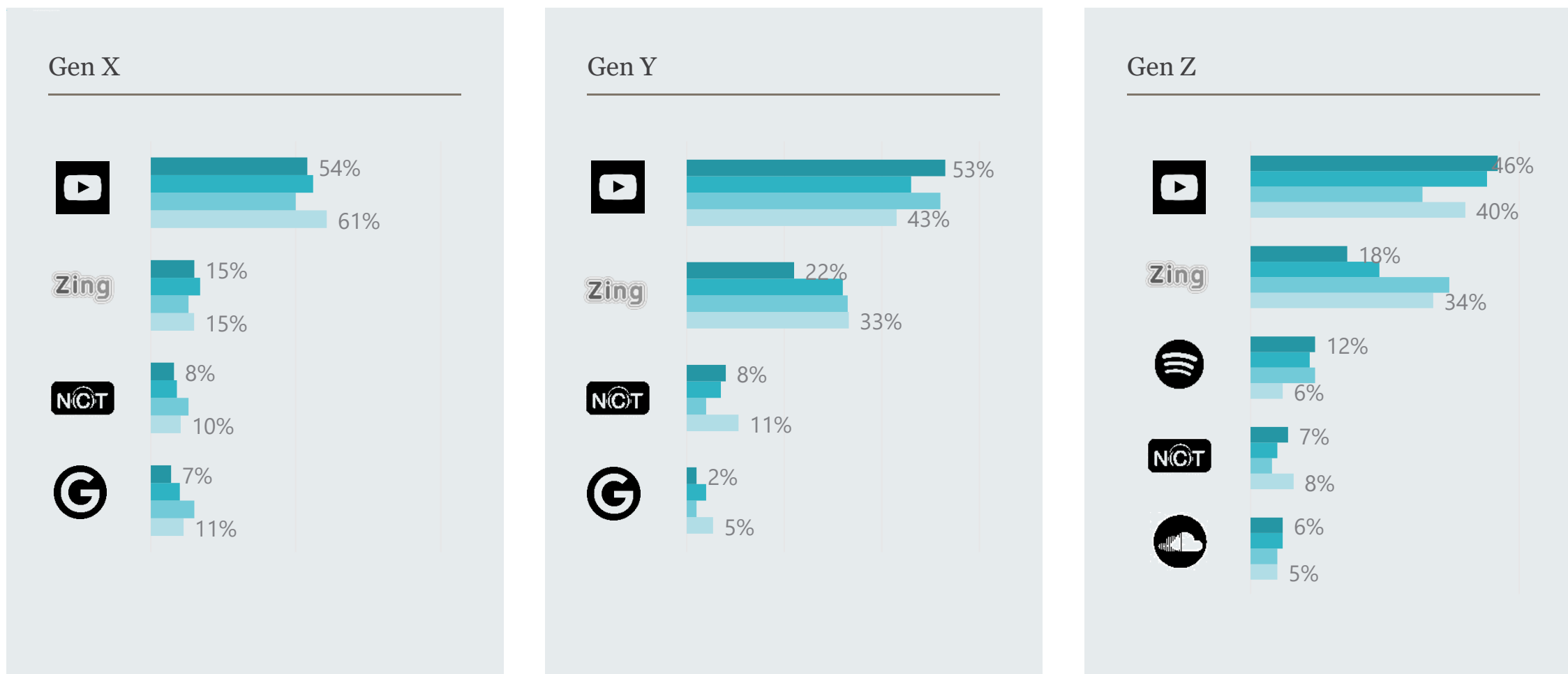


Q: Which app do you use most often when watching short videos?

■ Q1 2020 ■ Q2 2020 ■ Q3 2020 ■ Q4 2020 ■ Q1 2021 ■ Q2 2021

2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149

# Across age groups, YouTube is undoubtedly the No. 1 music streaming platform for Vietnamese consumers across age group.



Q: Which app do you use to listen to music most often?

■ Q3 2020 ■ Q4 2020 ■ Q1 2021 ■ Q2 2021

2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884,  
2020 Q3 n=1655

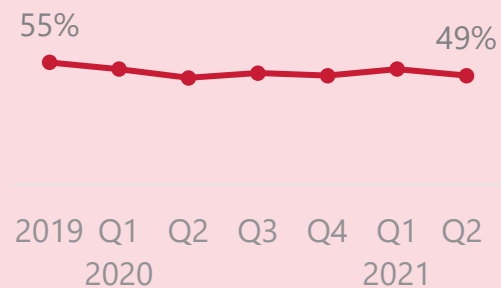
# Vietnamese consumers still consider YouTube a platform for all formats of visual contents, including movies.

## YouTube

Q2 2021

**49%**

**-3%**



## Local platforms

Q2 2021

**16%**

**-3%**



## Google Search

Q2 2021

**12%**

**+2%**



Q: Which of the following apps do you use most often to watch movies?

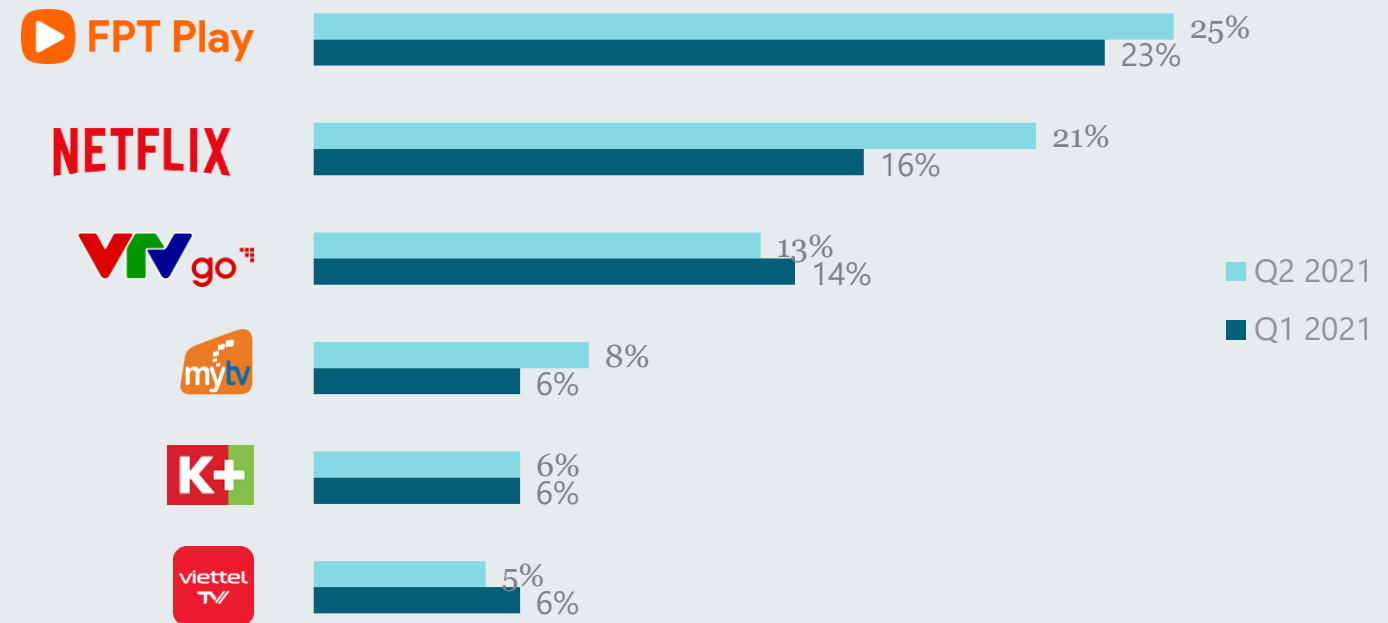
2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149, 2019 n=457

## Netflix has garnered a 5% increase in market penetration in Quarter 2/2021, slowly catching up to FPT Play.

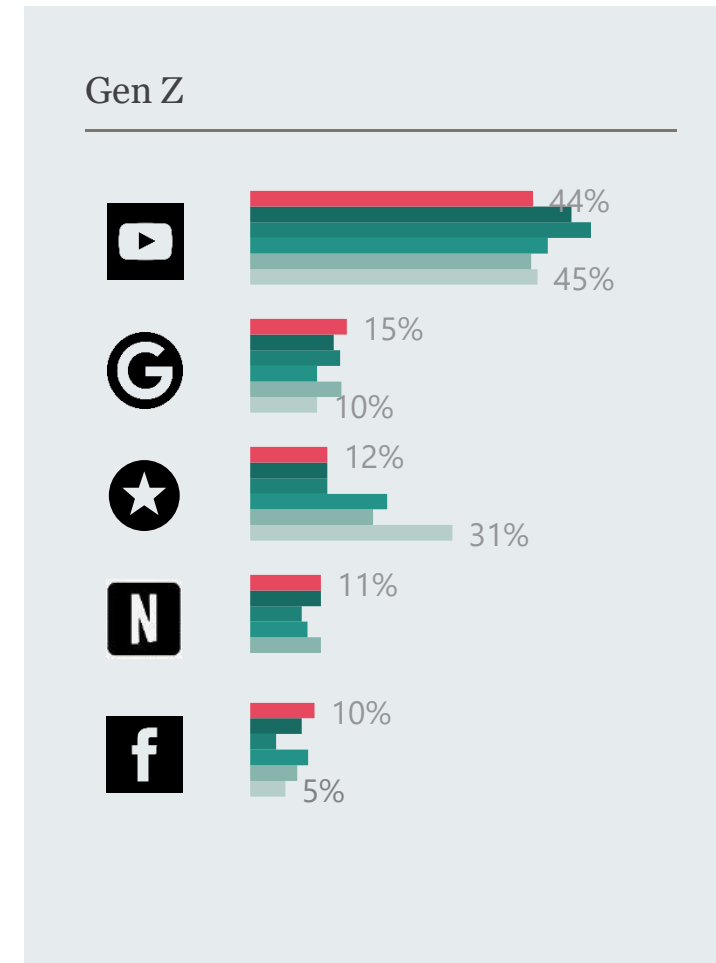
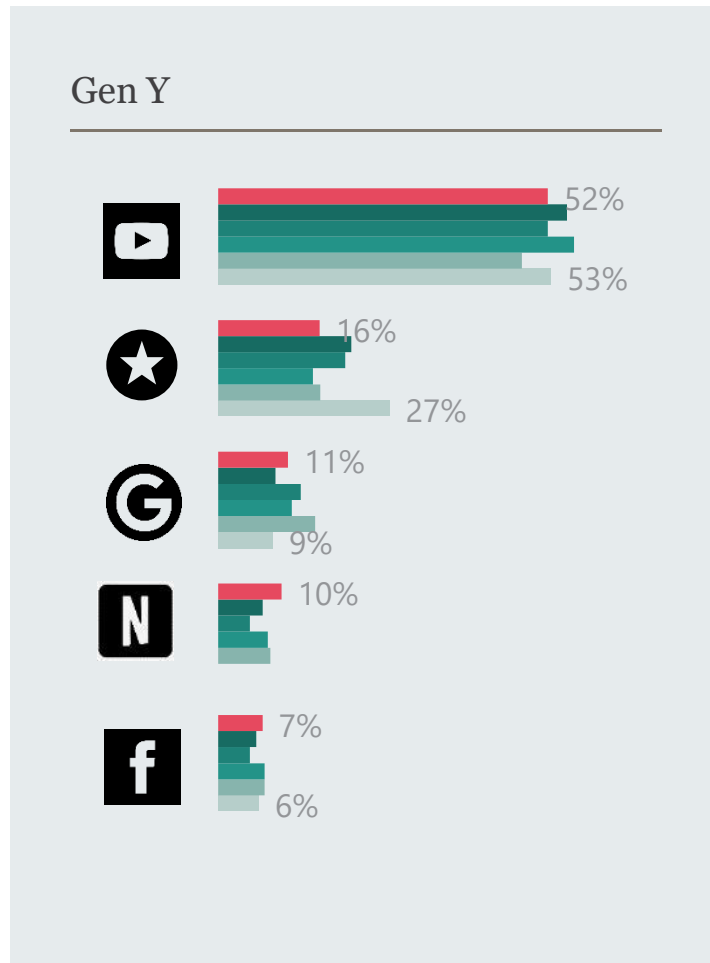
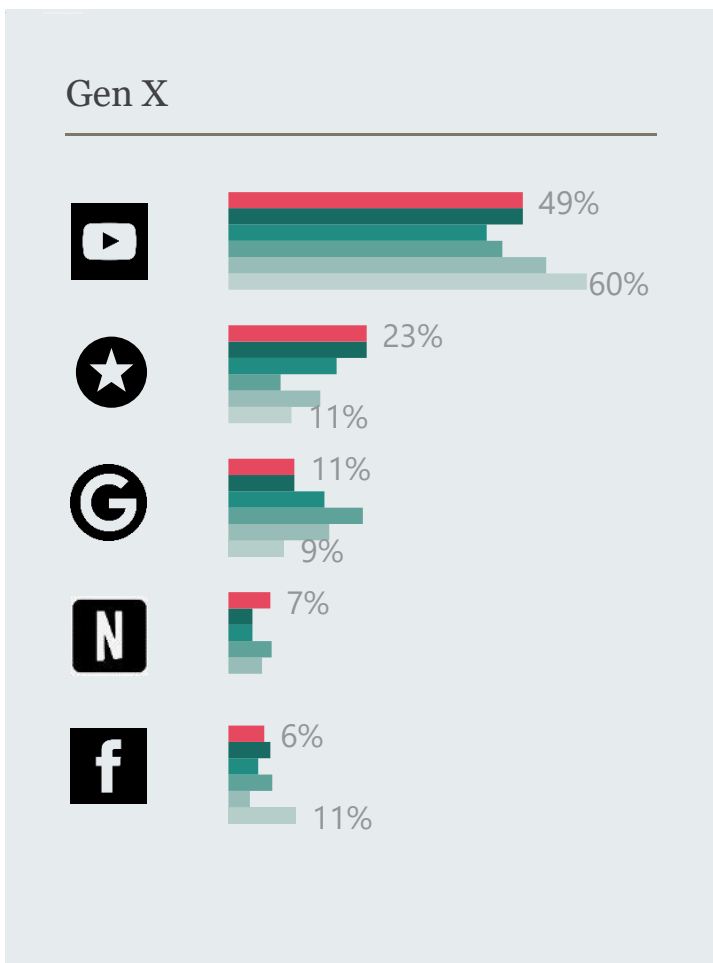
Compared to last quarter, the disparity between Netflix and FPT Play in terms of market penetration rates has gotten smaller.

Netflix is the only foreign player in Vietnam's market for streaming services.

Top paid streaming services in Vietnam by market penetration rates



# Netflix has captured more Gen X & Y audience in Q2 2021, while YouTube and local competitors serve as the go-to platforms for movie streaming.



Q: Which of the following apps do you use most often to watch movies? ■ Q1 2020 ■ Q2 2020 ■ Q3 2020 ■ Q4 2020 ■ Q1 2021 ■ Q2 2021 2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149, 2019 n=457





# Platforms by other functions

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NEWS

COMMUNICATION AND MESSAGING

CASUAL BROWSING

TOP POPULAR BROWSERS

E-COMMERCE PLATFORMS

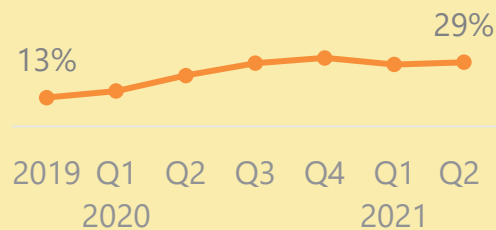
As with previous quarters, consumers search for news on Google Search, Facebook, and local websites (VnExpress, Dantri, etc.)

## Google Search

Q2 2021

**29%**

**+1%**

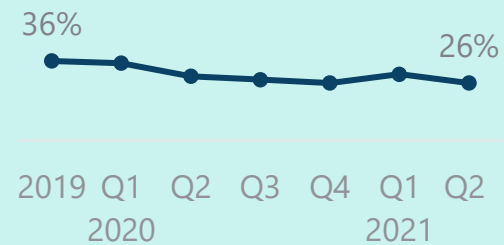


## Facebook

Q2 2021

**26%**

**-4%**

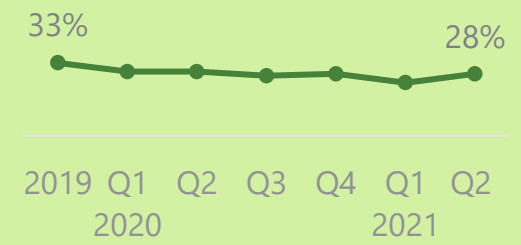


## Local publishers

Q2 2021

**28%**

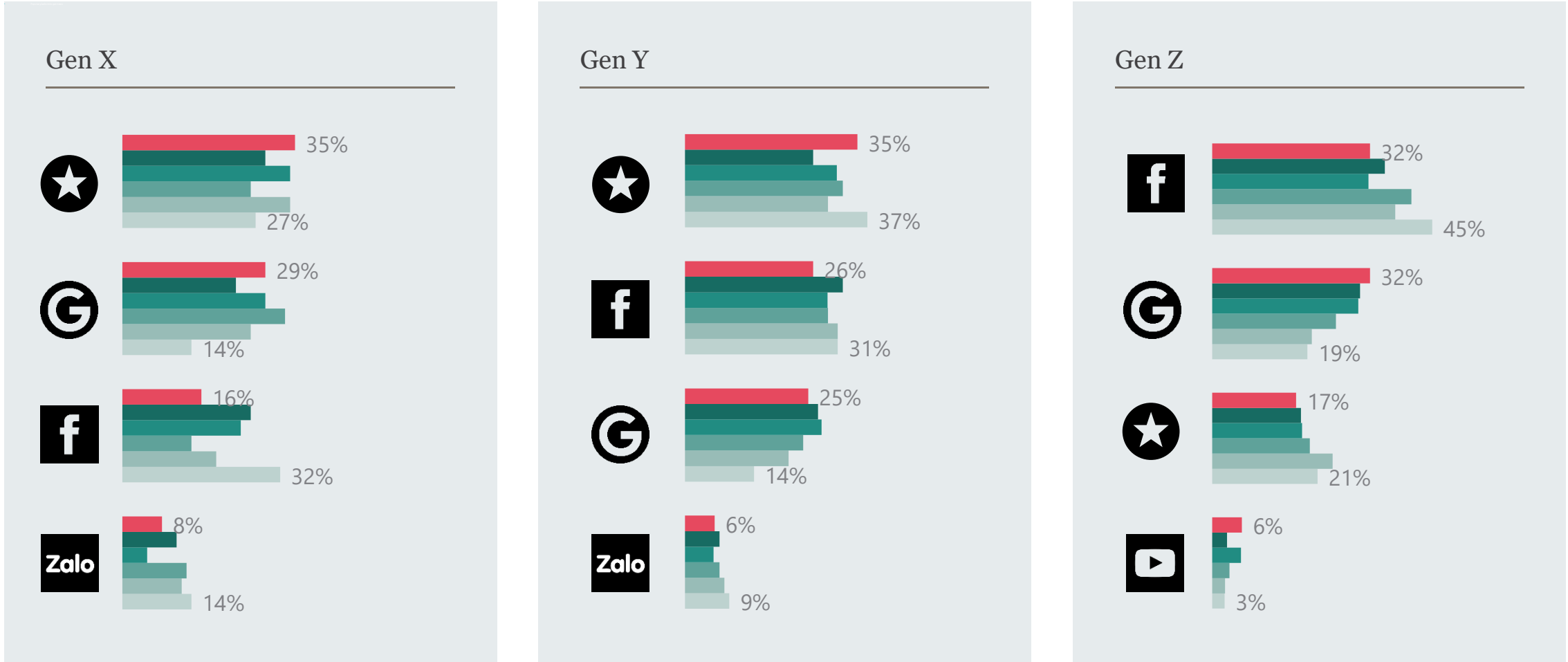
**+4%**



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

2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149, 2019 n=457

Facebook and Google has taken a back seat to local news websites for Gen X & Y audience in Quarter 2/ 2021. Gen Z are increasingly turning to Google Search as a source of information, ditching Facebook.



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

■ Q1 2020 
 ■ Q2 2020 
 ■ Q3 2020 
 ■ Q4 2020 
 ■ Q1 2021 
 ■ Q2 2021 
 2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149

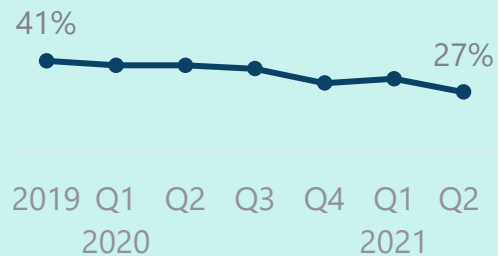
Zalo is the No. 1 messaging app for Vietnamese consumers. Facebook and Messenger are other popular communication tools.

## Facebook

Q2 2021

**27%**

**-5%**

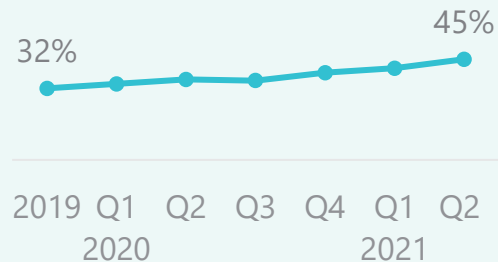


## Zalo

Q2 2021

**45%**

**+4%**

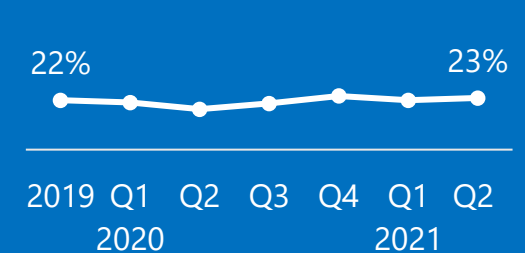


## Messenger

Q2 2021

**23%**

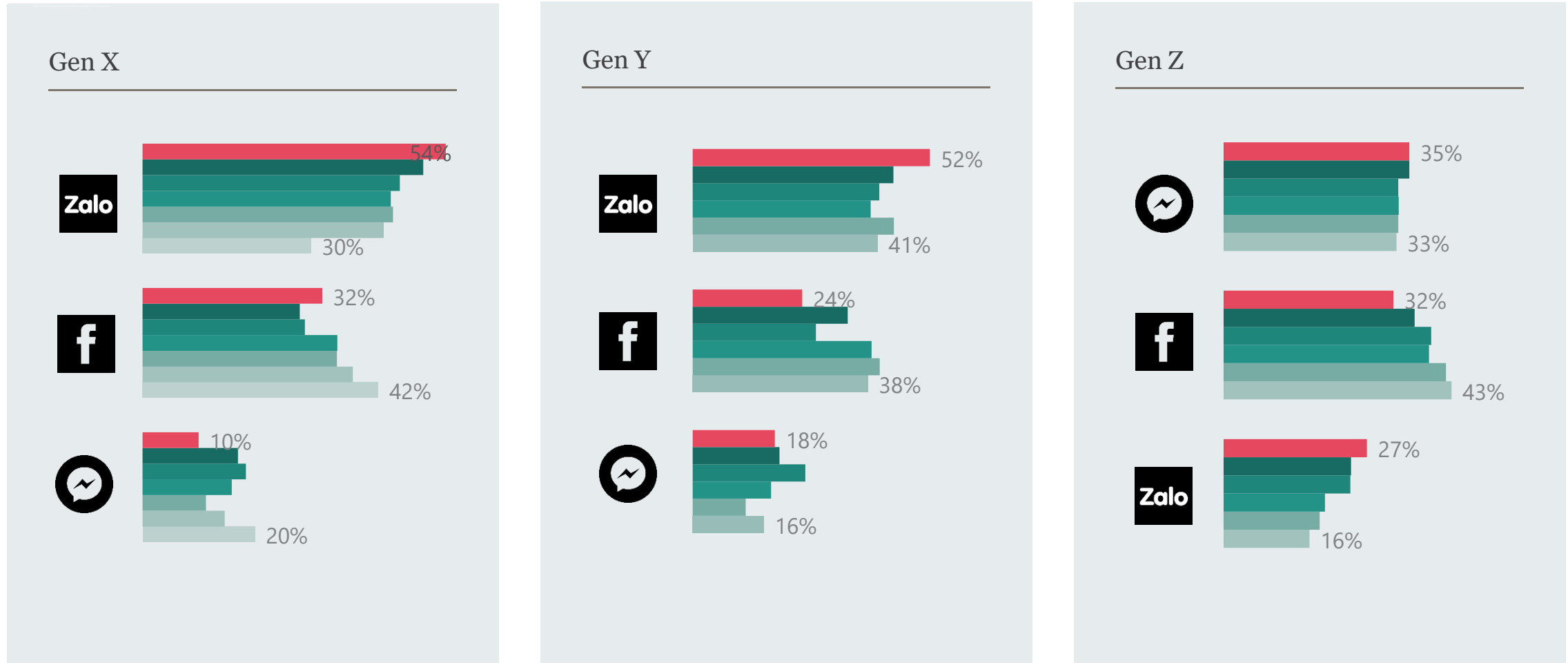
**+1%**



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

2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149, 2019 n=457

# Vietnamese consumers are moving away from Facebook as a communication tool, while increasingly favoring Zalo.



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

■ Q1 2020 
 ■ Q2 2020 
 ■ Q3 2020 
 ■ Q4 2020 
 ■ Q1 2021 
 ■ Q2 2021 
 2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149

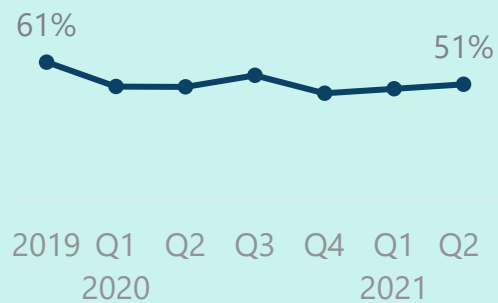
# Facebook is the No. 1 app for casual browsing, followed by YouTube and Zalo.

## Facebook

Q1 2021

**51%**

**+2%**

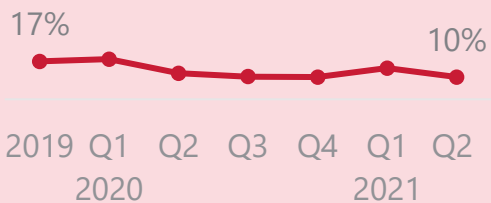


## YouTube

Q1 2021

**10%**

**-4%**



## Zalo

Q1 2021

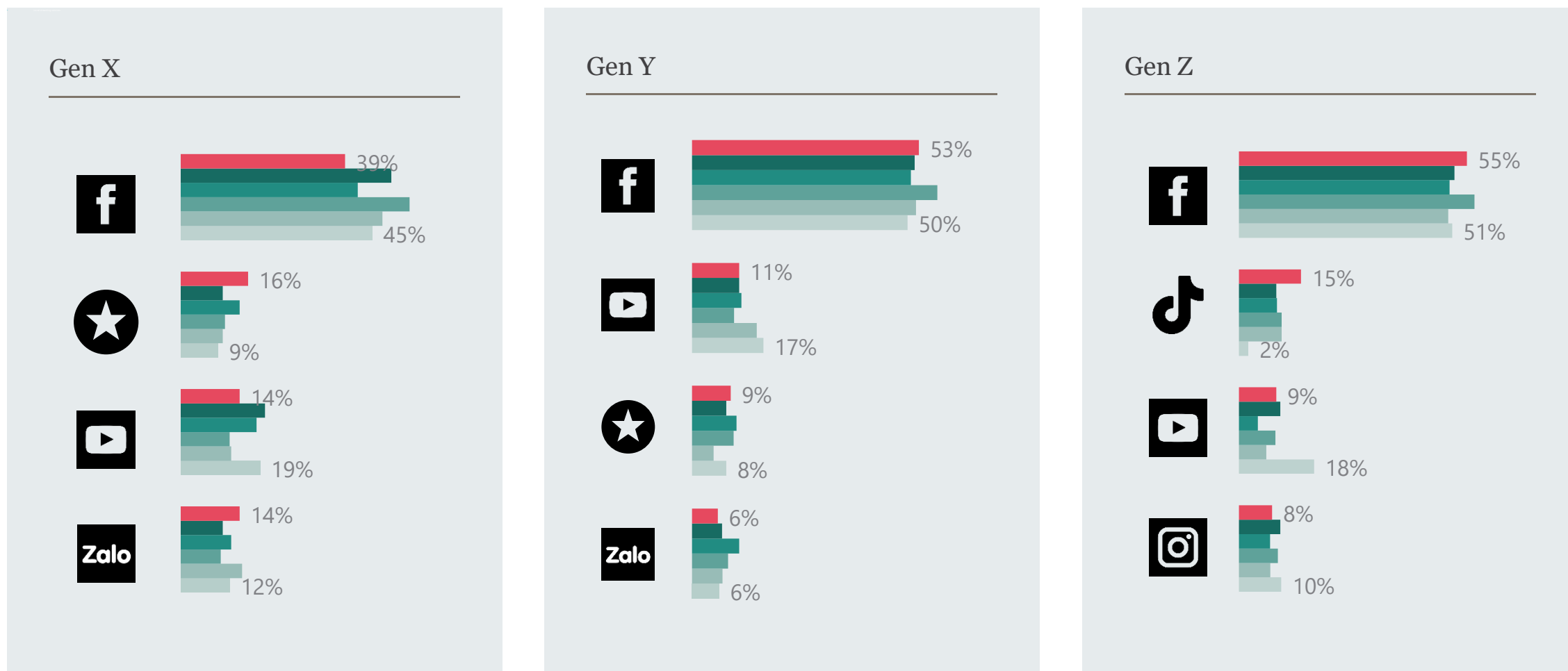
**6%**

**+0%**



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

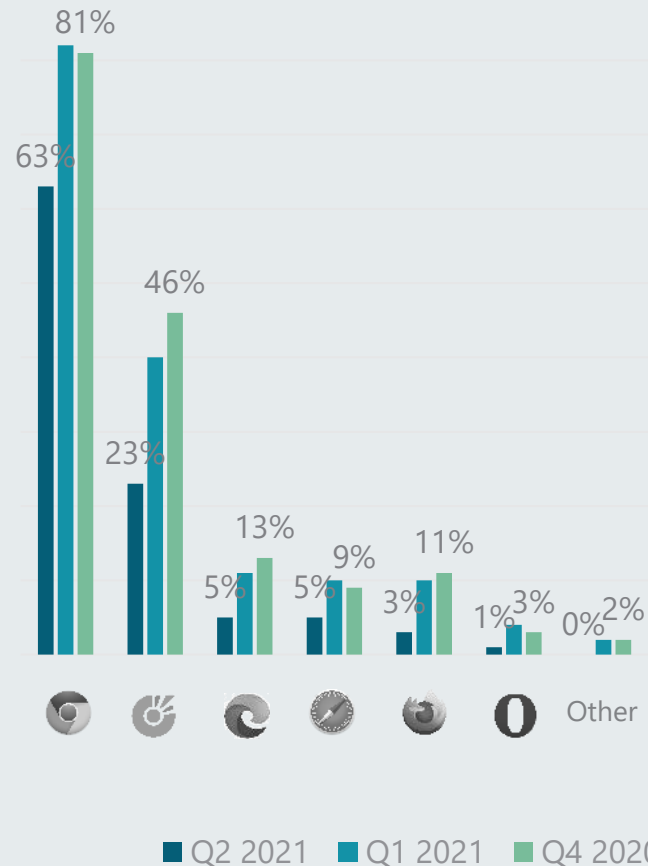
An increasing number of Gen Z consumers are using TikTok for casual scrolling besides Facebook. Other age groups prefer YouTube and local websites for this activity.



Q: In 2020, which of the following apps do you use most often when you want to browse mindlessly?

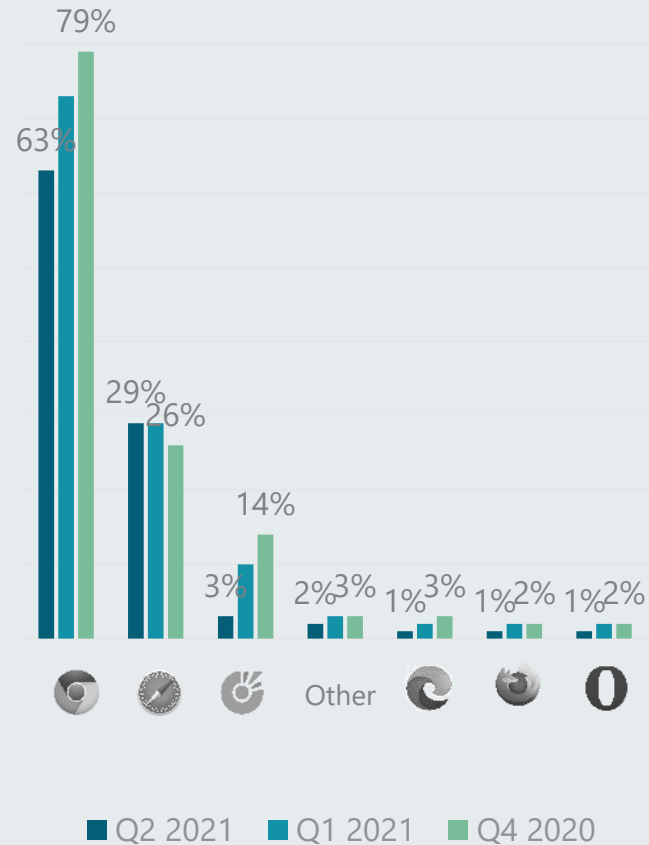
■ Q1 2020 
 ■ Q2 2020 
 ■ Q3 2020 
 ■ Q4 2020 
 ■ Q1 2021 
 ■ Q2 2021 
 2021 Q2 n=1833, 2021 Q1 n=2028, 2020 Q4 n=884, 2020 Q3 n=1655, 2020 Q2 n=1099, 2020 Q1 n=2149, 2019 n=457

### Most often used browser - PC



Q4 2020 n=884, Q1 2021 n=2028,  
2021 Q2 n=1833

### Most often used browser - Mobile

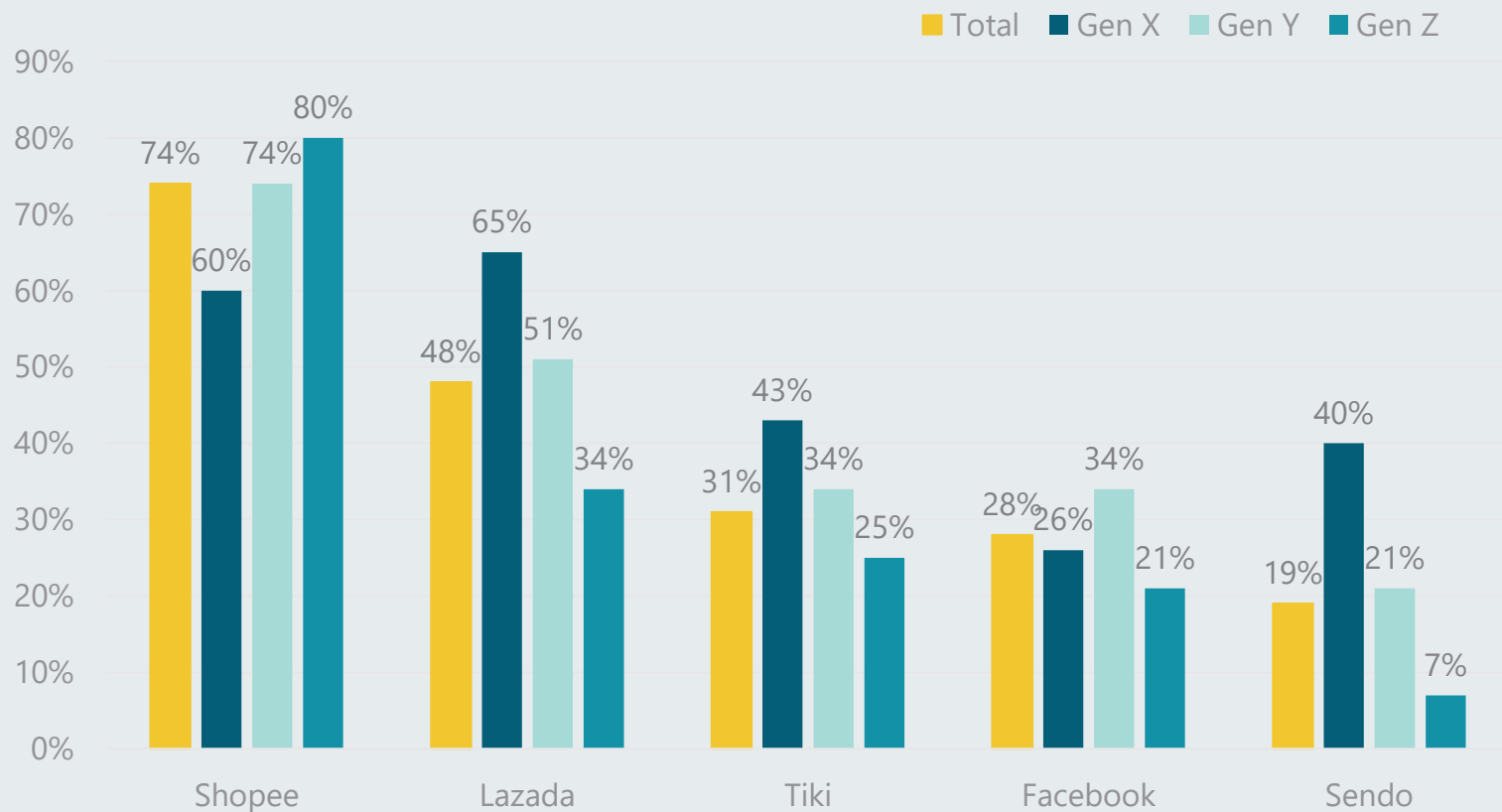


Q4 2020 n=884, Q1 2021 n=2028, 2021  
Q2 n=1833

Chrome is still by far the most popular browser, followed by CocCoc on PC and Safari on mobile devices.



## Top e-Commerce platforms



Q: Which of the following platforms/apps do you use for online shopping? Choose all that apply.

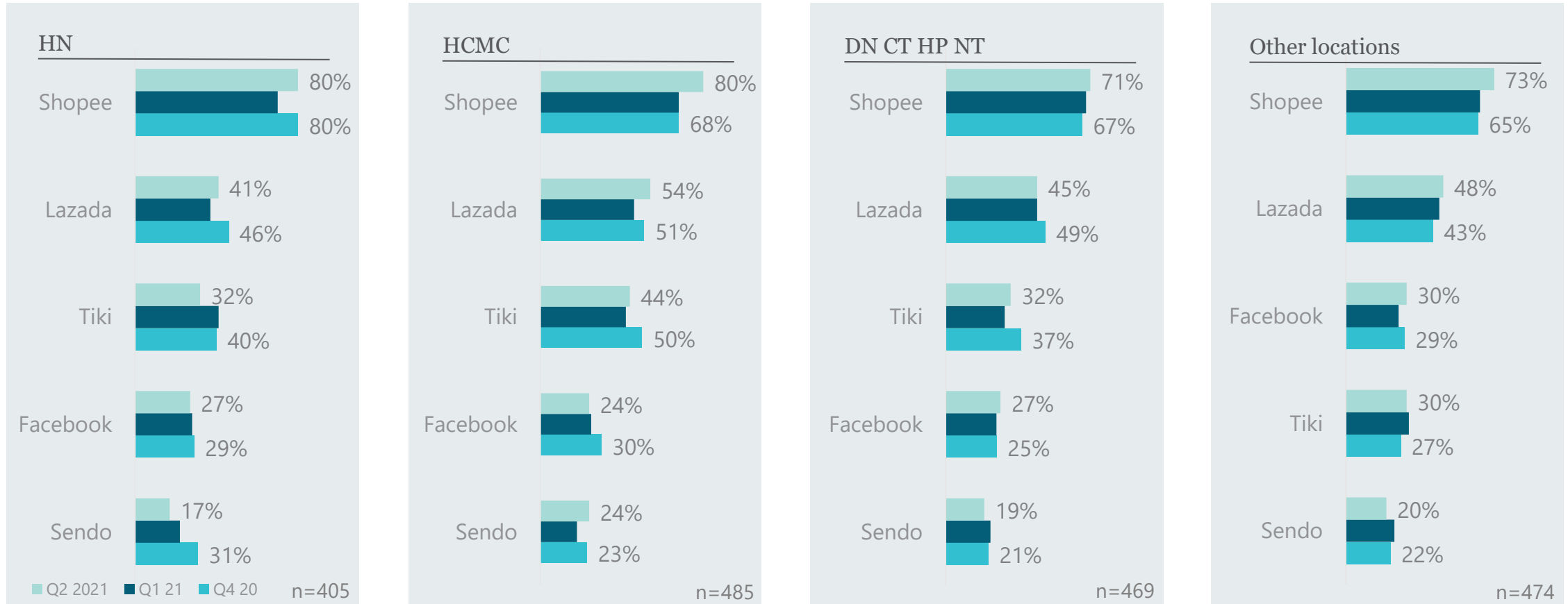
Q2 2021 n=1833; Gen X n=168, Gen Y n=482, Gen Z n=1183

**Shopee is the most popular e-Commerce platform. However, Gen X-ers prefer Lazada.**

Shopee has captured the Gen Z segment well, while Gen X consumers are keeping other e-Commerce platforms relevant.

Gen Y is curiously utilizing social commerce (Facebook) as much as Tiki for e-Commerce.

The e-Commerce “hierarchy” is clear across regions with Shopee dominating the market. That said, in rural areas, social commerce (Facebook) competes with Tiki for the third spot after Lazada.

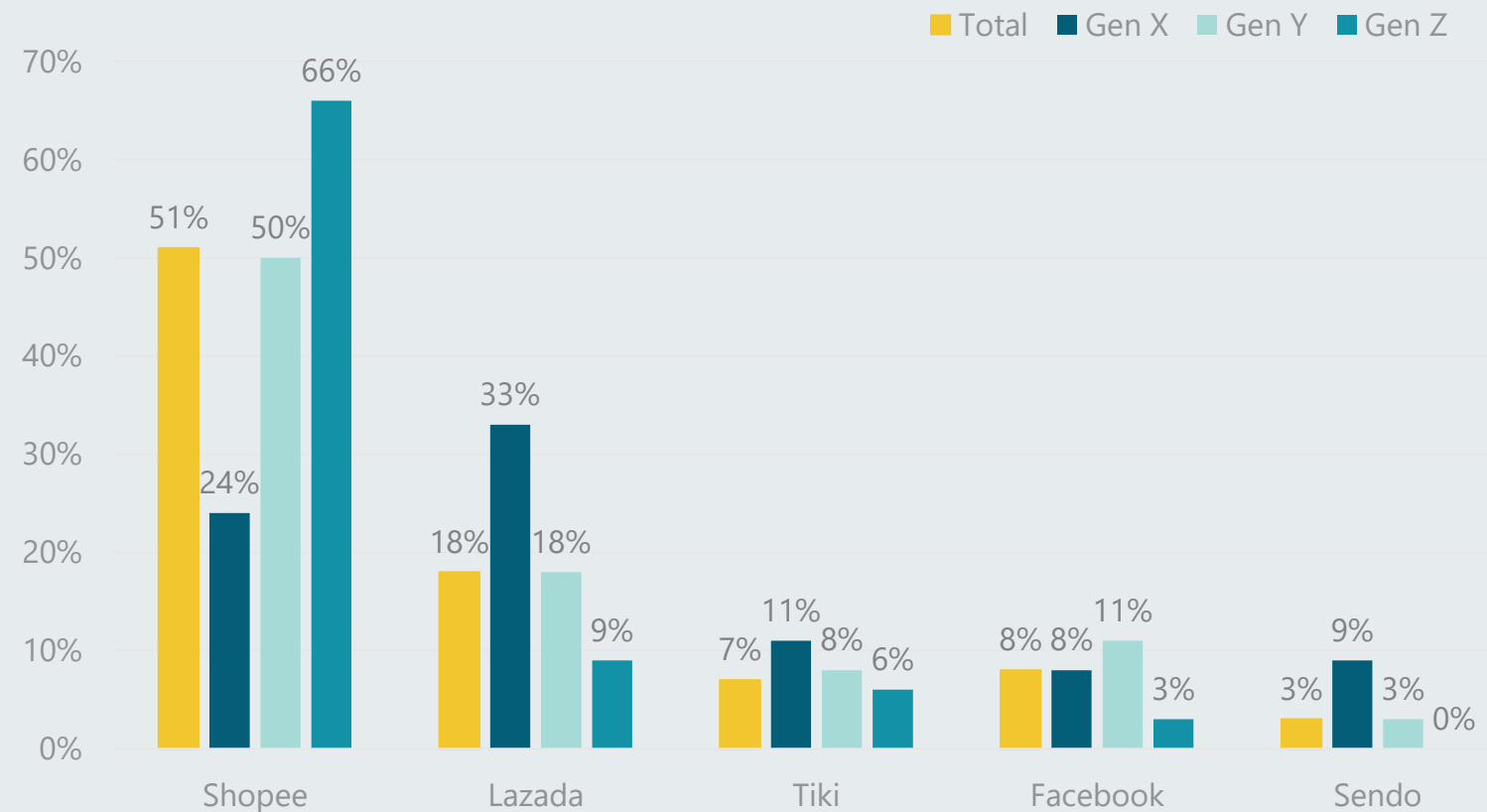


Q: Which of the following platforms/apps do you use for online shopping? Choose all that apply.

2021 Q2 n=1833  
 2021 Q1 n=1925  
 2020 Q4 n=884

Shopee is the go-to e-Commerce destination for Gen Y & Z consumers. Lazada is the favorite e-Commerce platform among Gen X-ers.

### Top preferred e-Commerce platforms



Q: What is your most often used platform/app for online shopping?

Q2 2021 n=1833; Gen X n=168, Gen Y n=482, Gen Z n=1183

## KEY FINDINGS

- Apps penetration rates and the number of apps in concurrent use are increasing across age groups, which indicates that Vietnamese consumers are more present on digital platforms than ever.
- Even though Facebook is the most popular app in Vietnam, its leading position is increasingly diminished across multiple categories (primary apps, news, short videos).
- Zalo is voted Gen X consumers' primary app for the first time, supplanting Facebook.
- Shopee dominates Vietnam's e-Commerce scene, driven largely by Gen Z users. Rankings among e-Commerce platforms are consistent across regions.

## WHAT IT MEANS FOR ADVERTISERS

- Advertisers should shift more budget to digital channels, especially during prolonged periods of time when people must stay at home.
- Advertisers should consider alternatives like TikTok and Zalo in addition to Facebook.
- To choose the optimal e-Commerce channels, advertisers should be mindful of the age and location of their target segment.



# We help marketers to establish a return on their ad investments

## Understand Your Audiences

- Usage & Attitude
- Path-to-Purchase
- Touchpoints Study
- Media Habits
- Devices Usage
- Digital Consumer Segmentation

## Planning and Executing

- Media and Digital Channel Mix Optimization
- Optimal Frequency
- Media Performance Benchmark
- Brand Lift Benchmark

## Measuring and Validating

- Brand Lifts
- Campaign Impact Validation
- Brand Tracking
- Digital Reach Measurement
- Cross-Media Measurement

## Learning and Iterating

- Media Hypotheses
- Channel Hypotheses
- Ad Format Hypotheses
- Creative Testing
- Cross-Channel Synergies

# Our Solutions



## AGILE CUSTOM TESTING

Make it easy to get fast and reliable feedback from consumers

**\*From 3,890 USD**



## BRAND HEALTH TRACK

Monitoring the brand health performance in real-time to make agile, consumer-focused decisions

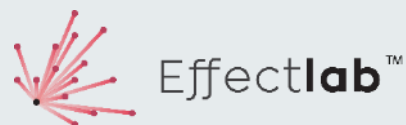
**From 1,800 USD/Month**



## AUDIENCE MEASUREMENT

Enable to analyze and optimize digital media investments in real-time across platforms

**From 2,000 USD**



## BRAND LIFT STUDY

Quantify and provide insights to understand the effectiveness of the digital campaigns

**\*From 5,500 USD**

Agile research products that gives you direct consumer response and allows you to make fast decisions. Why us?

- Agile research approach
- Best-in-class survey methodology
- Largest and most accurate online community in Southeast Asia
- Decision-focused reports with real-time dashboards
- Cost Effective



## Reach out to us

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