

The Connected Consumer Q3 2022

# The New “Everything App” is Here

Report prepared by YouGov Decision Lab in  
collaboration with MMA Vietnam

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Living Consumer Intelligence | [www.ygdl.vn](http://www.ygdl.vn)



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# Background

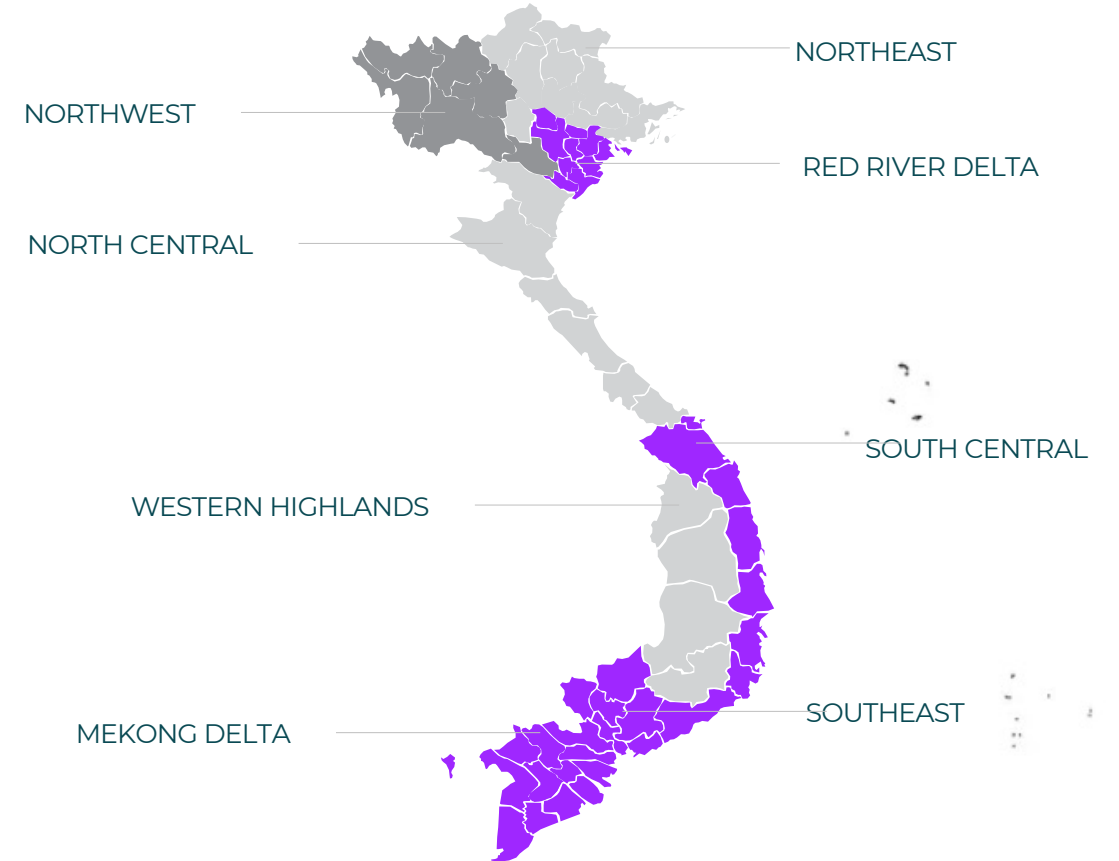
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The Connected Consumer is a quarterly study conducted by Decision Lab starting in 2019. The study focuses on consumers' online habits, including social media usage, entertainment (music, movies, online videos), as well as online shopping. Data in this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

QUARTER	SAMPLE COLLECTION PERIOD	TOTAL SAMPLE SIZE
Q3 2022	Jul 2022 – Sep 2022	1507
Q2 2022	Apr 2022 – Jun 2022	1644
Q1 2022	Jan 2022 – Mar 2022	1455
Q4 2021	Oct 2021 – Dec 2021	881
Q3 2021	Jul 2021 – Sep 2021	1440
Q2 2021	Apr 2021 – Jun 2021	1833
Q1 2021	Jan 2021 – Mar 2021	2028
Q4 2020	Oct 2020 – Dec 2020	884
Q3 2020	July 2020 – Sep 2020	1655
Q2 2020	Apr 2020 – Jun 2020	1099
Q1 2020	Dec 2019 – Feb 2020	2149
2019	Aug 2019 – Sep 2019	457



# The Connected Consumers profiles



## **Gen Z**

*Born between 1997 – 2006  
Age 16 - 25*



## **Gen Y**

*Born between 1981 – 1996  
Age 26 - 41*



## **Gen X**

*Born between 1960 – 1980  
Age 42 - 62*

# Key highlights

**1.** Vietnamese digital consumers utilized social media less in Q3 2022. TikTok was the only platform to see overall usage growth in the quarter.

**2.** TikTok is emerging as Vietnam's new "everything app", fit for not only short video consumption but also news, entertainment video, among others.

**3.** In a relatively disappointing quarter for top E-commerce platforms, TikTok is a fast-rising e-commerce channel. Silver lining for incumbents: TikTok hasn't grown to be Vietnamese consumers' most preferred platform yet.

**4.** The only category with systematic growth in usage and favorability is the food delivery app category. ShopeeFood and Grab Food are the top players in the market, with roughly similar usage and consumer preference.



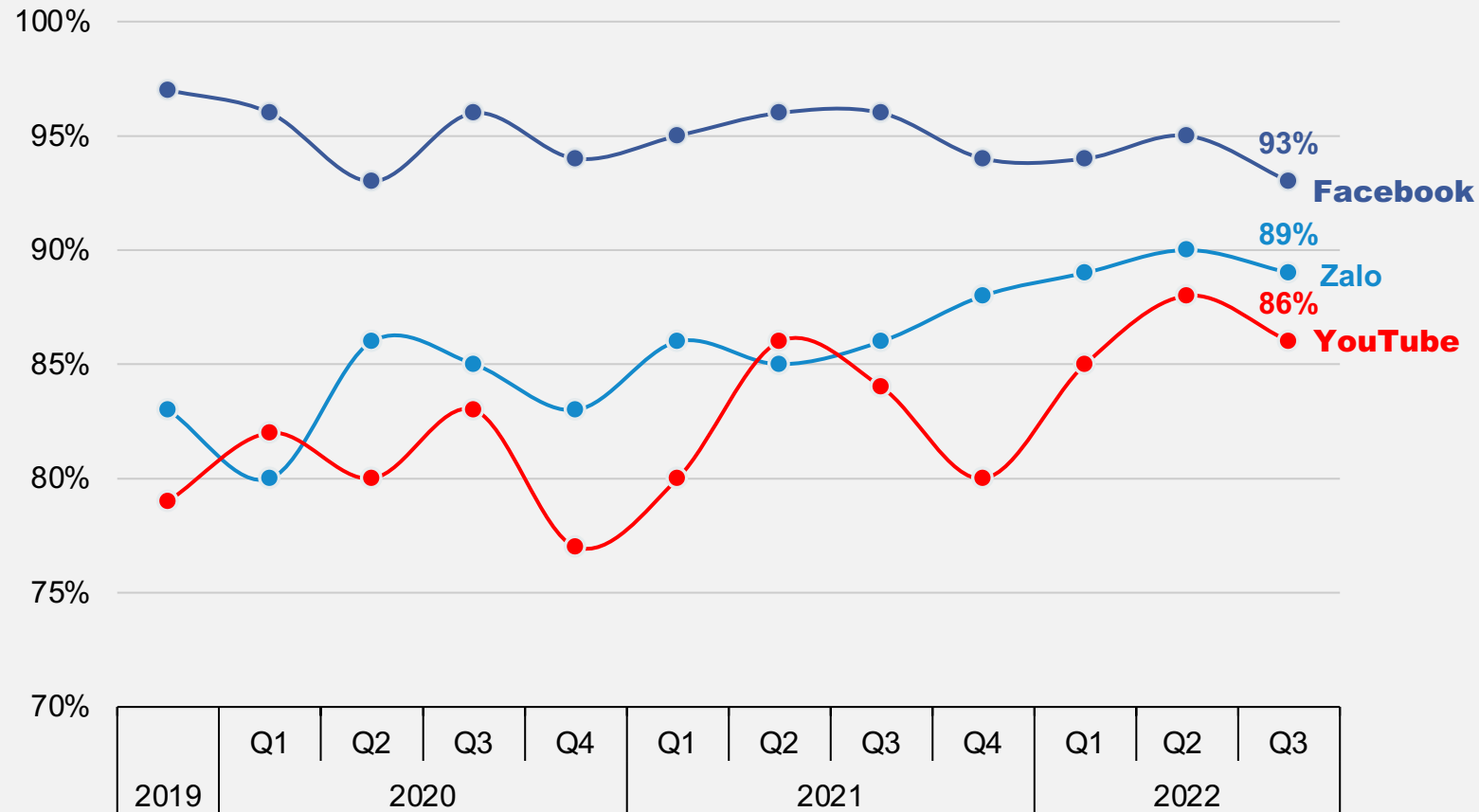
# **SOCIAL MEDIA PLATFORMS**

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### Top 3 social media platforms—Penetration rates (%)



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

Q3 2022 n=1507

## Usage of the top 3 social media platforms declined in Q3 2022.

After two consecutive quarters of continued growth, the 3 biggest social media platforms saw a small decline in usage in Q3 2022.

This is the first time since Q2 2021 that Zalo has experienced a decrease in usage.

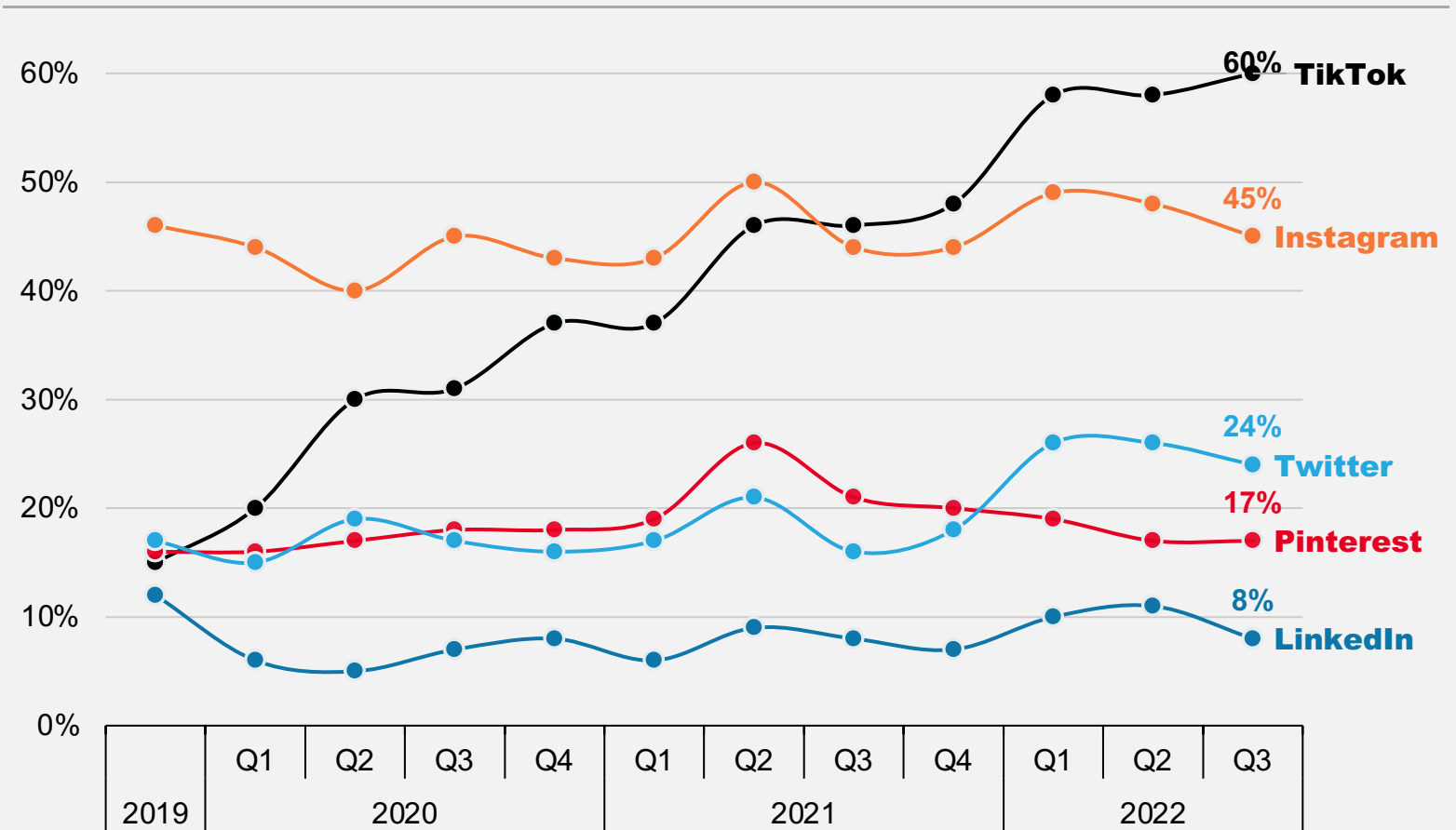


# TikTok was the only major social media platform to witness usage growth in Q3 2022.

When considering other major platforms, it became apparent that TikTok was the only platform to grow in Q3 2022, adding 2 percentage points (pp) in usage after 2 stagnant quarters.

This shows the continued expansion of the short-video platform in Vietnam.

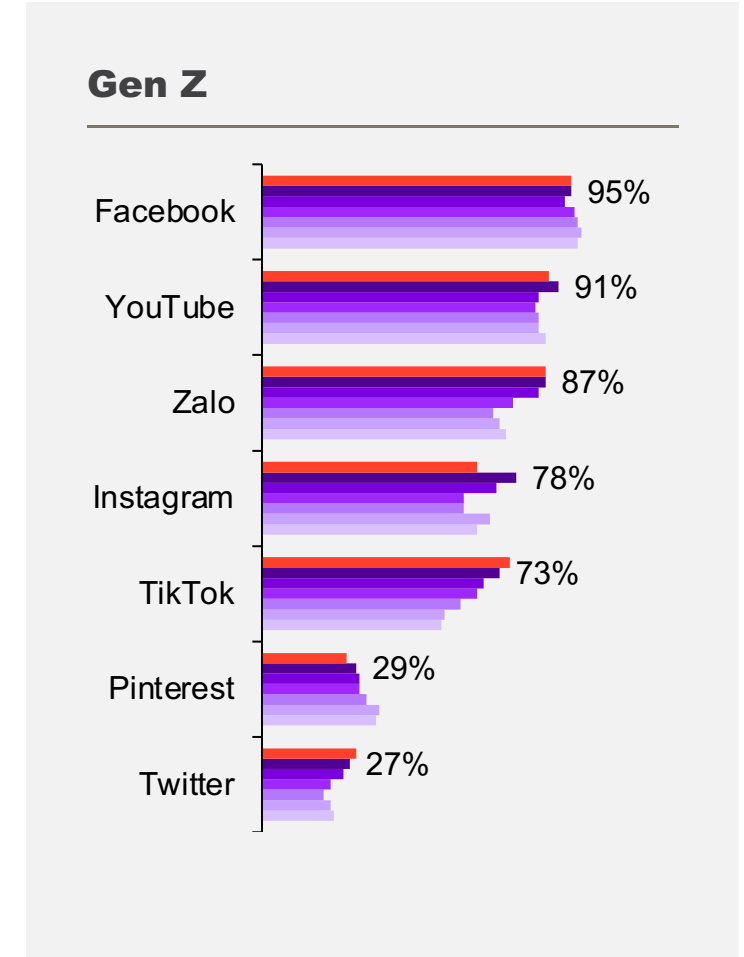
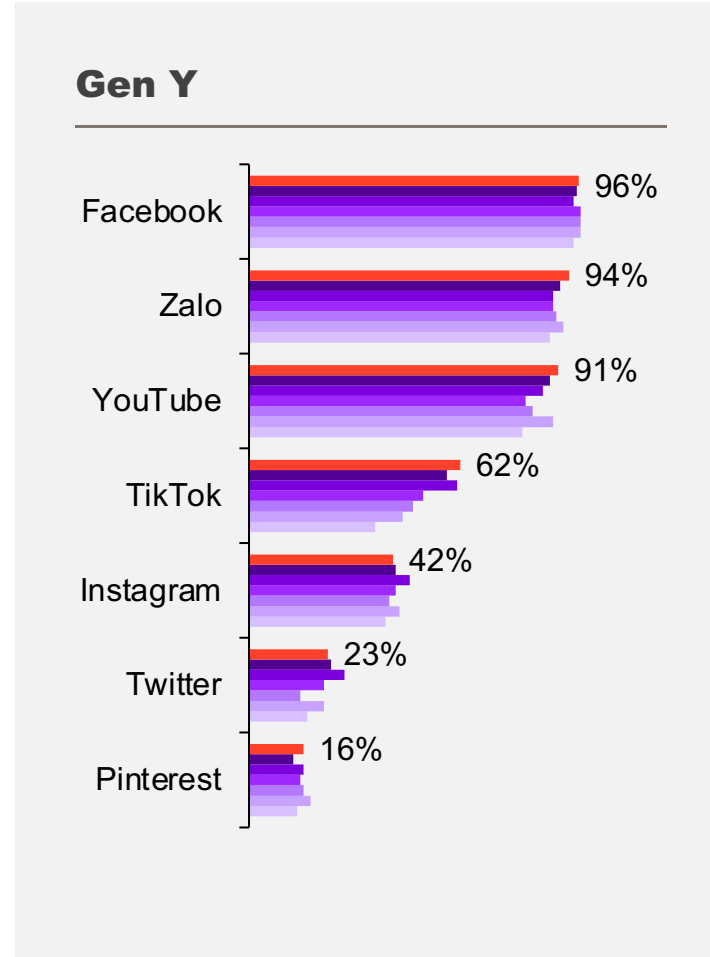
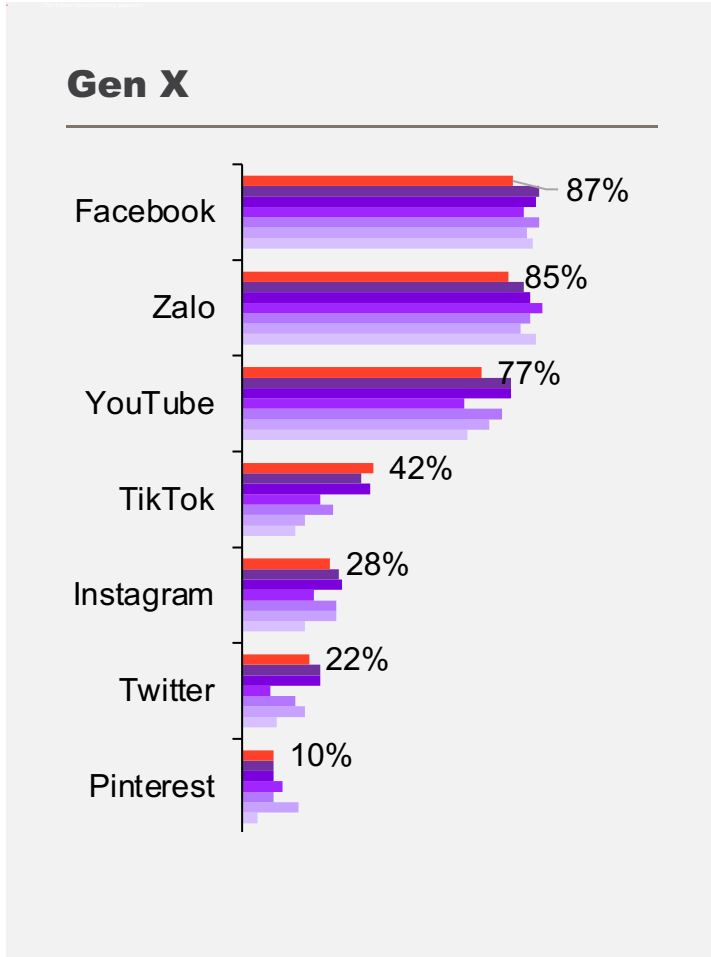
**Top social media platforms—Penetration rates (%)**



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

Q3 2022 n=1507

# TikTok's rise can be seen across age groups. Among Gen X and Y users, TikTok bounced back to early 2022's level after a slight dip in Q2 2022.

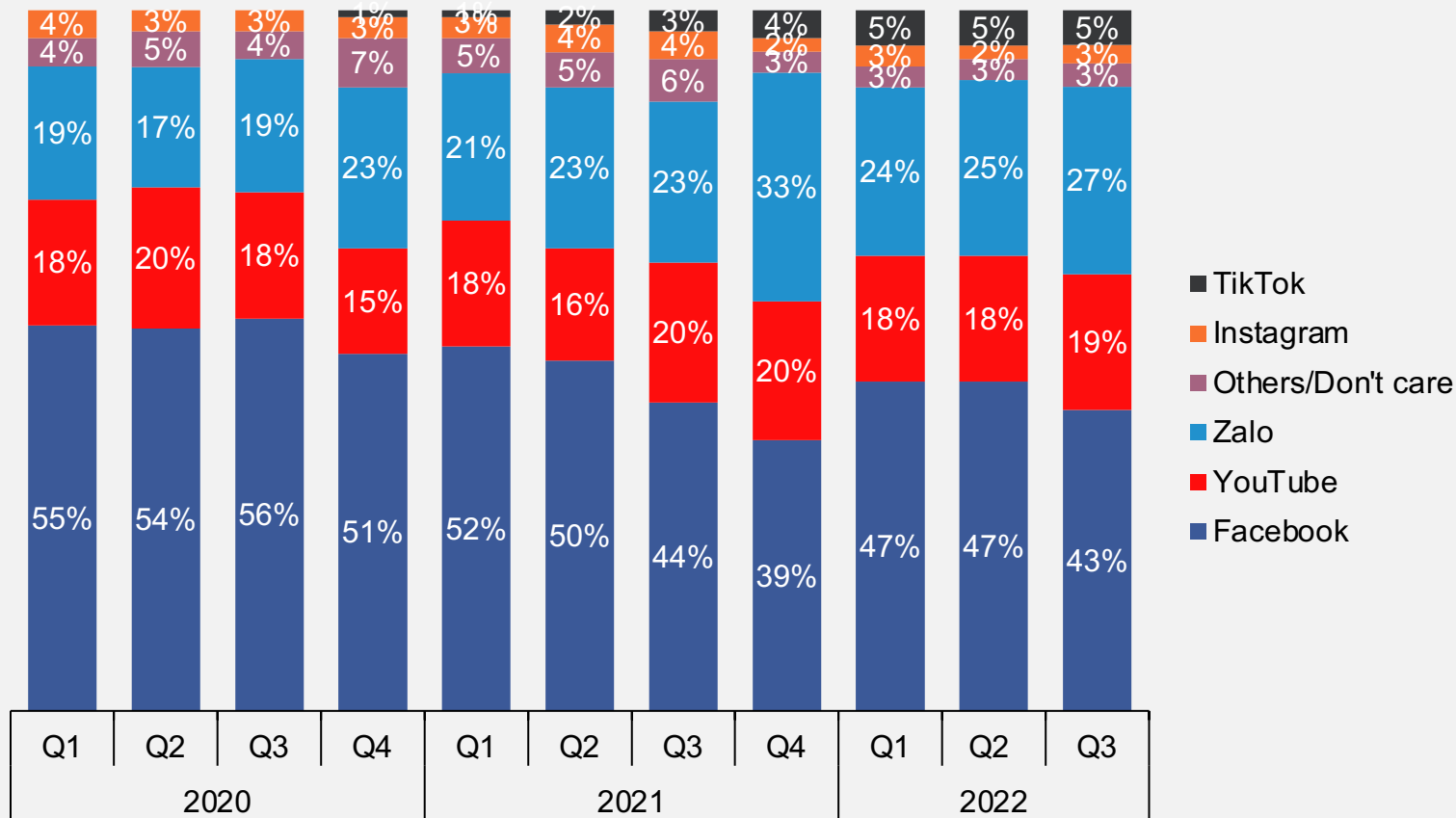


Q: Which of the following social media platforms are you using?  
(Choose all that apply)

Q1 2021 Q2 2021 Q3 2021 Q4 2021 Q1 2022 Q2 2022 Q3 2022

Gen Z n=453; Gen Y n=638; Gen X n=416

### Consumers' primary applications

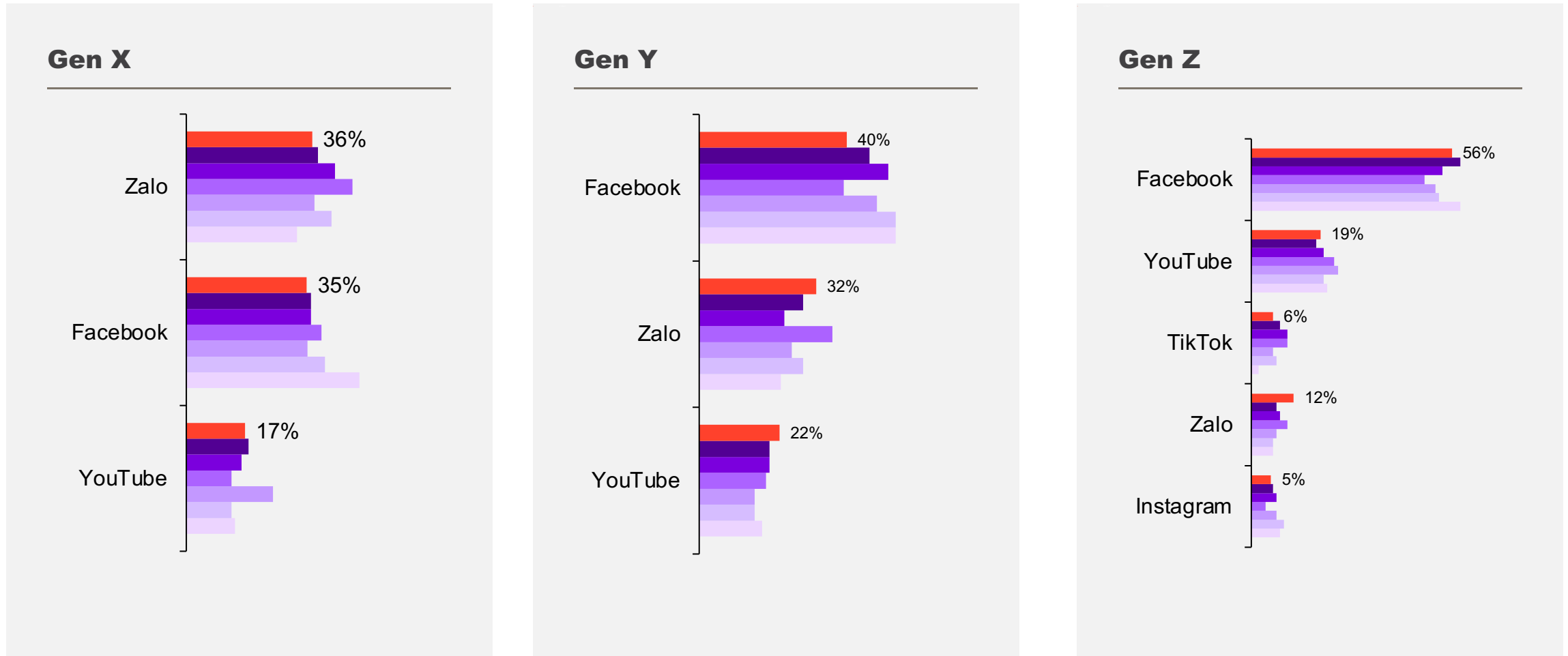


**Zalo (+2pp) and YouTube (+1pp) saw slight increases as Vietnamese's primary applications.**

Q: What is your one primary app?

Q3 2022 n=1507

**Both platforms' position as Vietnam's primary app is surging for Gen Y and Gen Z, the latter of which also showed slightly lower consideration for Facebook as a primary app.**



Q: What is your one primary app?

Q1 2021 Q2 2021 Q3 2021 Q4 2021 Q1 2022 Q2 2022 Q3 2022 Gen Z n=453; Gen Y n=638; Gen X n=416

# PLATFORMS BY CATEGORY

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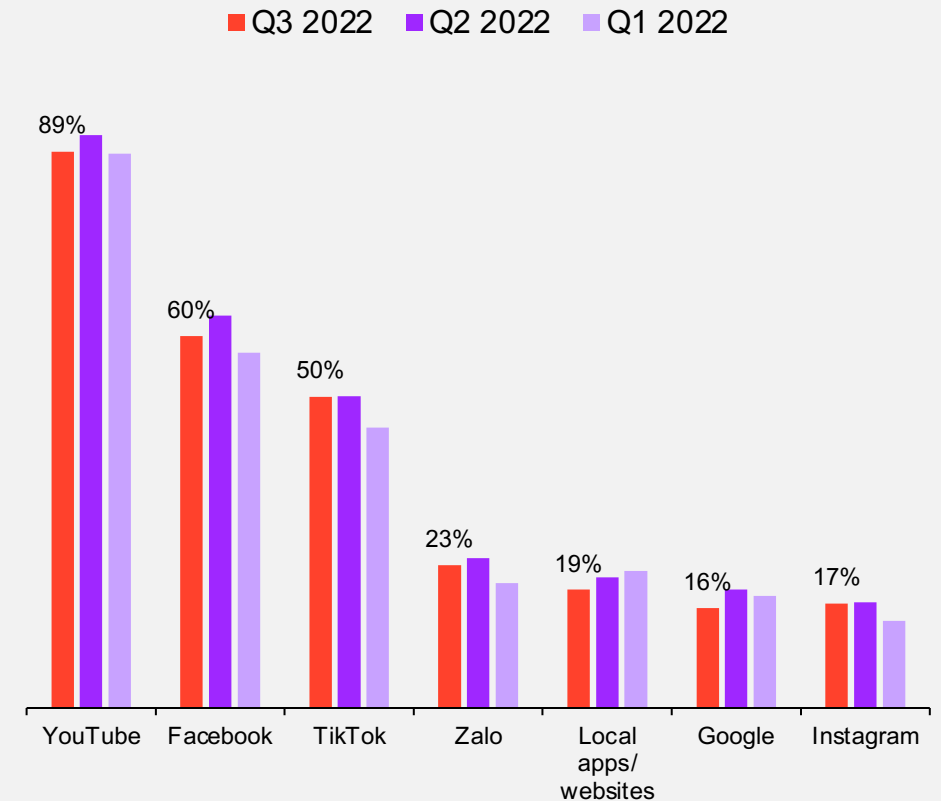
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# Entertainment Videos

**TikTok maintained penetration rates from Q2 2022 even as most other platforms faced declines in Q3 2022.**

**Top platforms for entertainment videos—Penetration rates (%)**



Q: Which websites/apps do you use to watch music or entertainment videos? Choose all that apply.

Q3 2022 n=1507

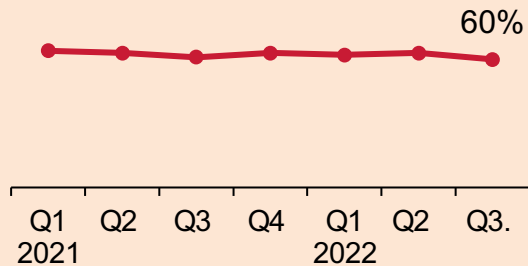
## Though TikTok's overall penetration remained stable from the previous quarter, its preference among users increased by 2pp.

### YouTube

Q3 2022

**60%**

**-3%**

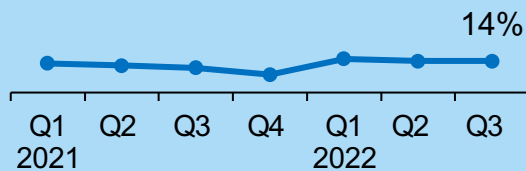


### Facebook

Q3 2022

**14%**

**+0%**

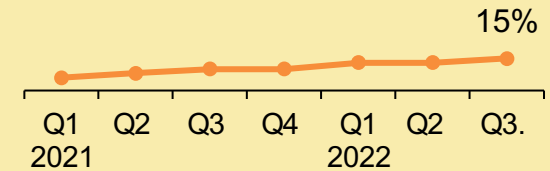


### TikTok

Q3 2022

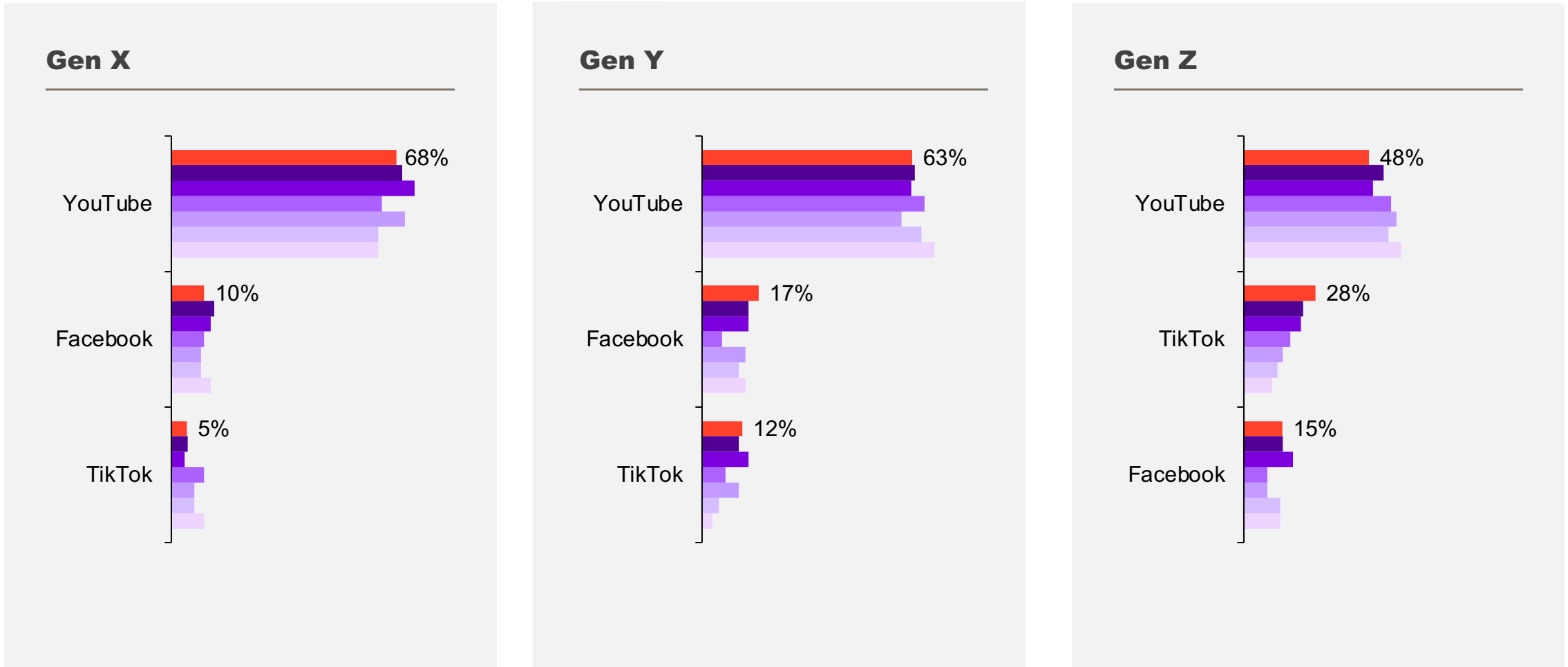
**15%**

**+2%**





**Notably, TikTok’s rate of preference growth in the category was strongest among Gen Z users (+21%).**



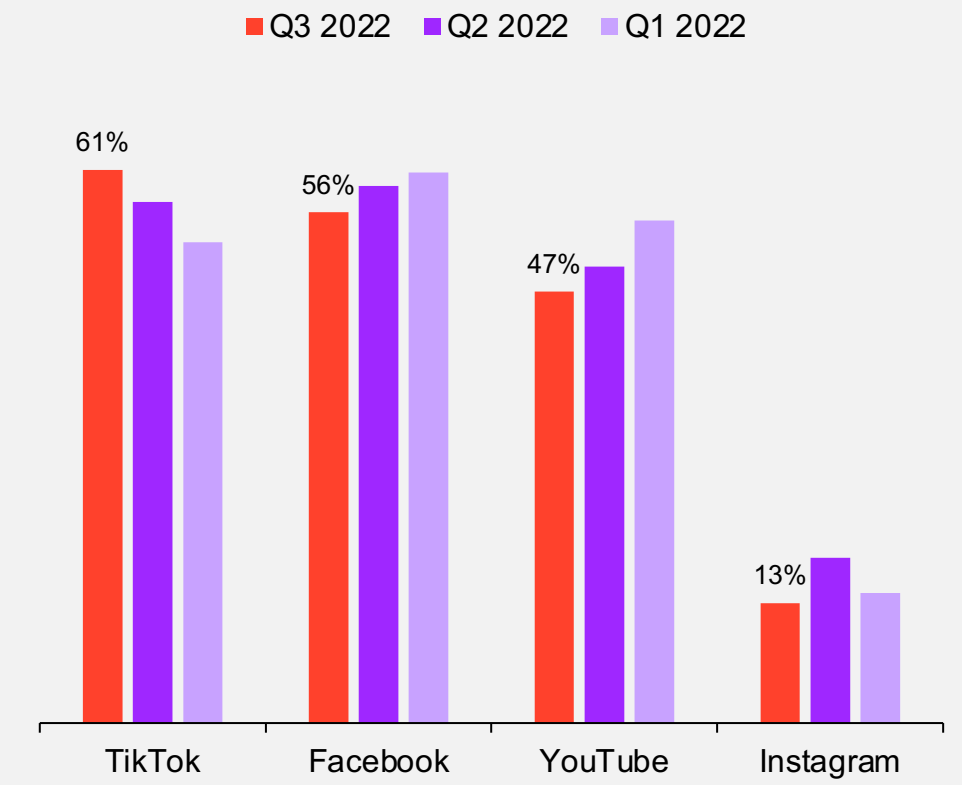
Q: Which websites/apps do you use most frequently to watch music or entertaining videos?

Q1 2021 Q2 2021 Q3 2021 Q4 2021 Q1 2022 Q2 2022 Q3 2022 Gen Z n=453; Gen Y n=638; Gen X n=416

# Short Videos

**TikTok led the short-video domain by usage in Q3 2022, having grown by 4pp.**

**Top platforms for short videos—Penetration rates (%)**



Q: Which websites/apps do you use to watch short videos (<3mins)?  
Choose all that apply.

Q3 2022 n=1507

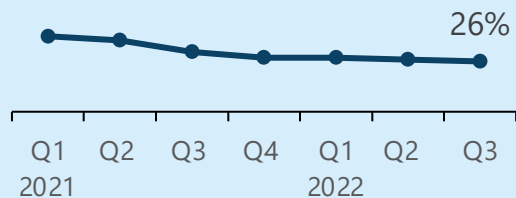
**That said, despite TikTok's usage growth, preference for the platform plateaued for the first time since Q1 2021 in the latest quarter.**

## Facebook

Q3 2022

**26%**

**-1%**

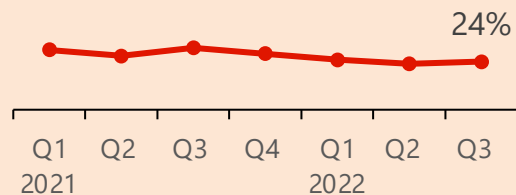


## YouTube

Q3 2022

**24%**

**+1%**

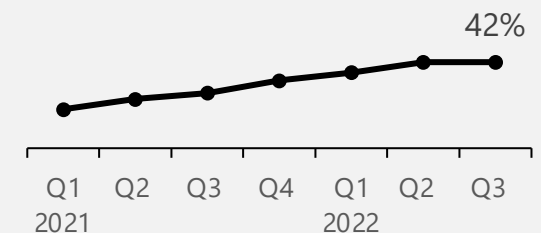


## TikTok

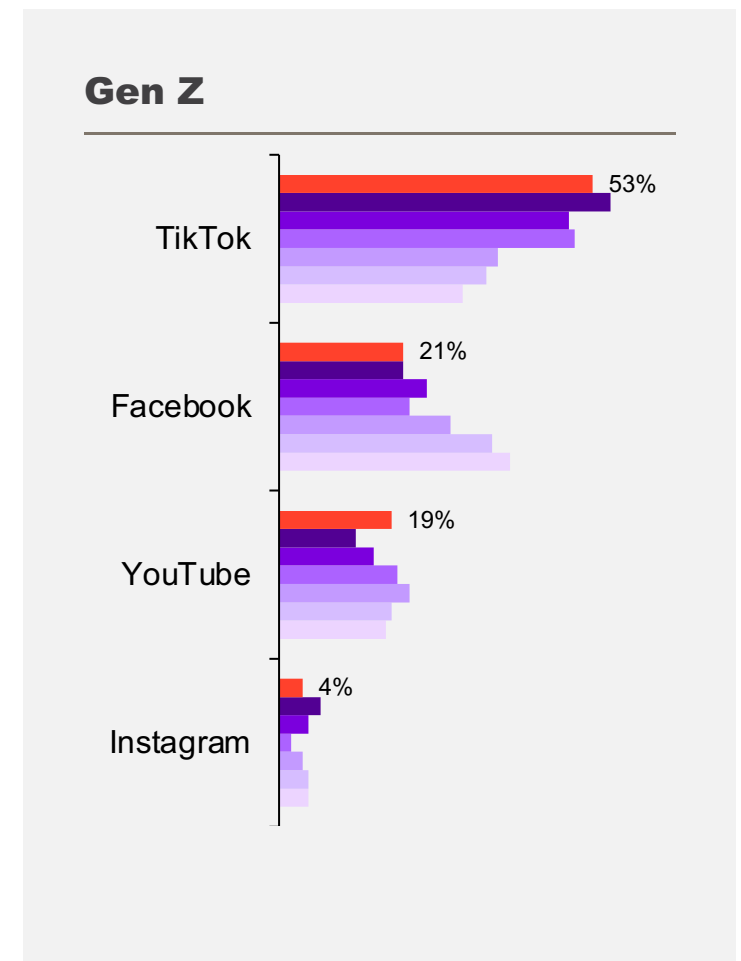
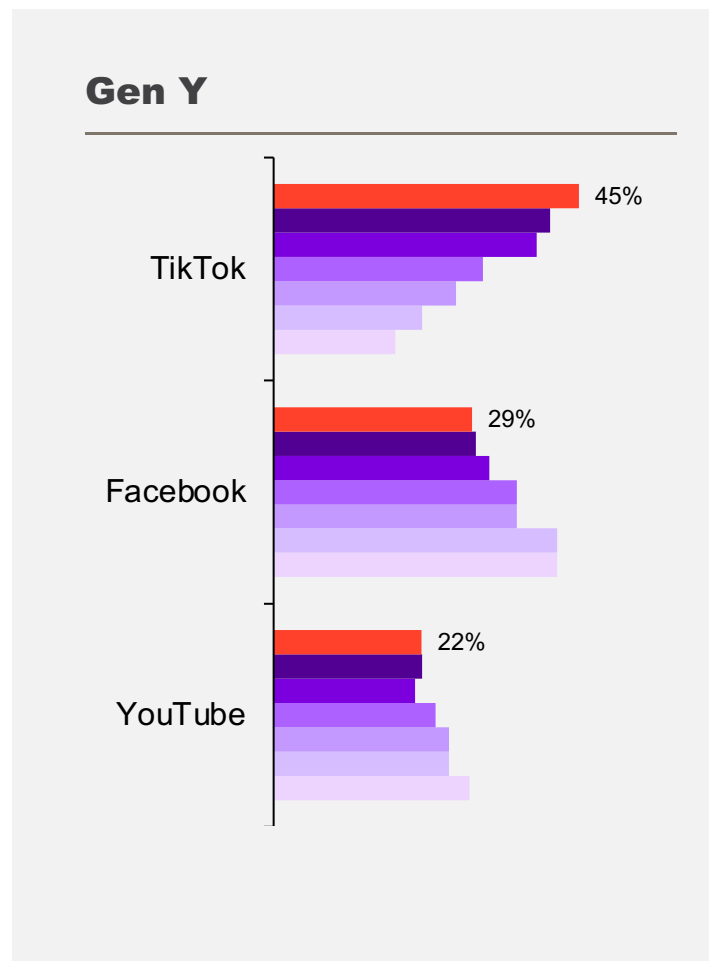
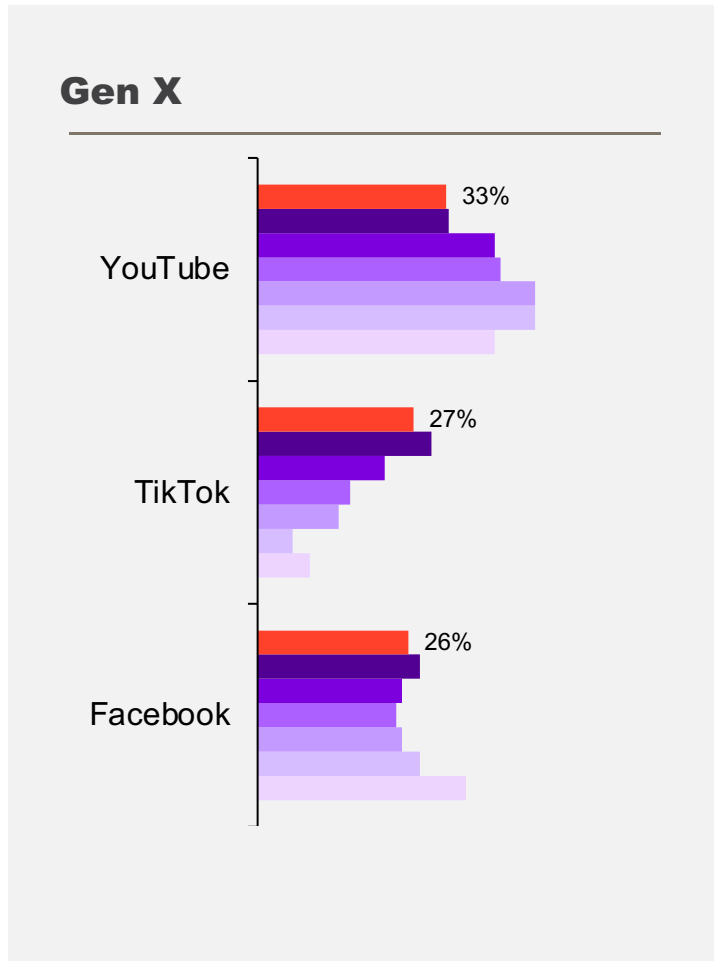
Q3 2022

**42%**

**+0%**



# While preference for TikTok continued to increase among Gen Y, Gen X and Gen Z users showed less preference for the platform.



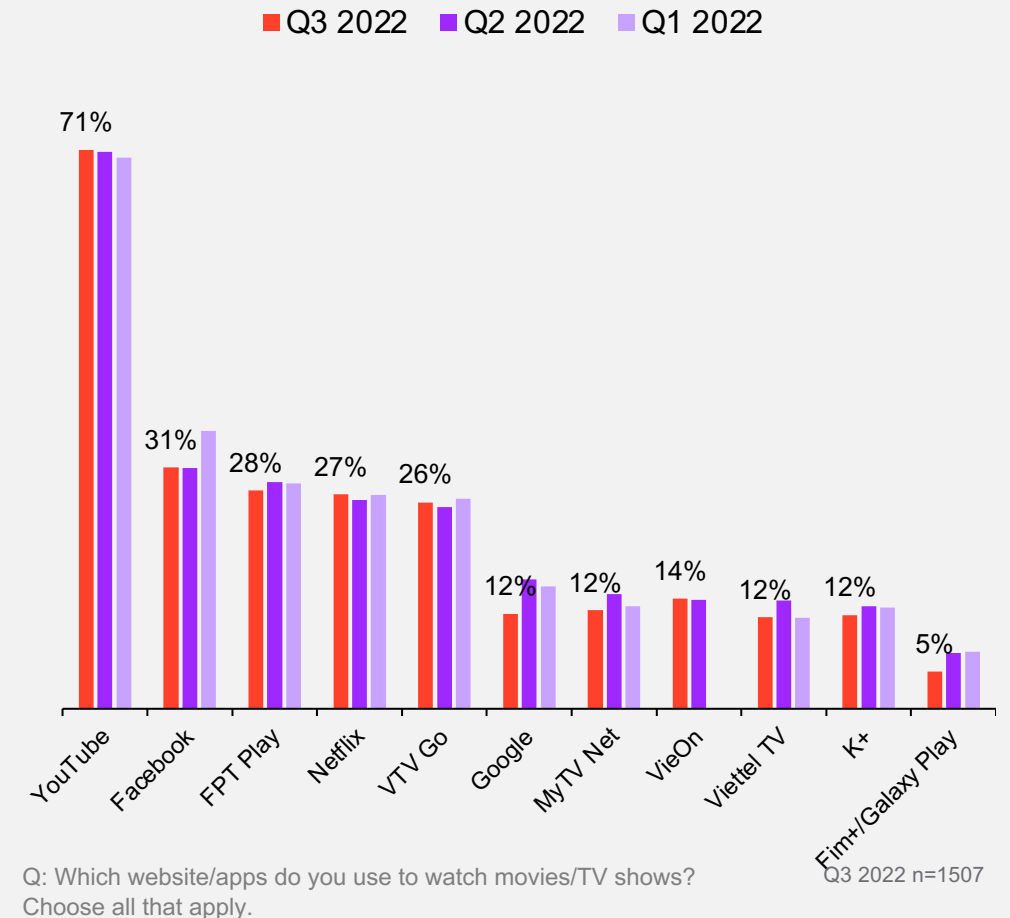
Q: Which websites/apps do you use most frequently to watch short videos (<3mins)?

■ Q1 2021 
 ■ Q2 2021 
 ■ Q3 2021 
 ■ Q4 2021 
 ■ Q1 2022 
 ■ Q2 2022 
 ■ Q3 2022 
 Gen Z n=453; Gen Y n=638; Gen X n=416

# Movies Streaming

In an otherwise stable movie-streaming landscape, Vietnamese consumers are shying away from using Google Search when they want to watch movies.

Top platforms for movies streaming—Penetration rates



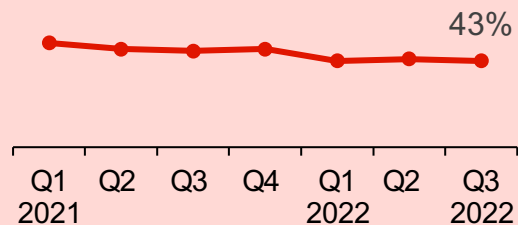
## Netflix also recorded a 2pp increase in preference from Vietnamese users as a movie-streaming platform.

### YouTube

Q3 2022

**43%**

**-1%**

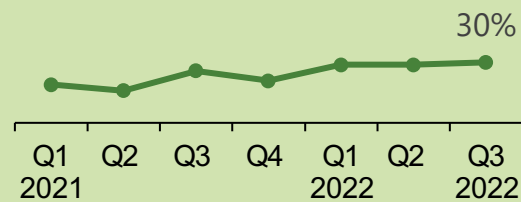


### Local platforms\*

Q3 2022

**30%**

**+1%**

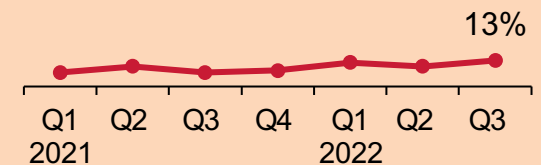


### Netflix

Q3 2022

**13%**

**+2%**

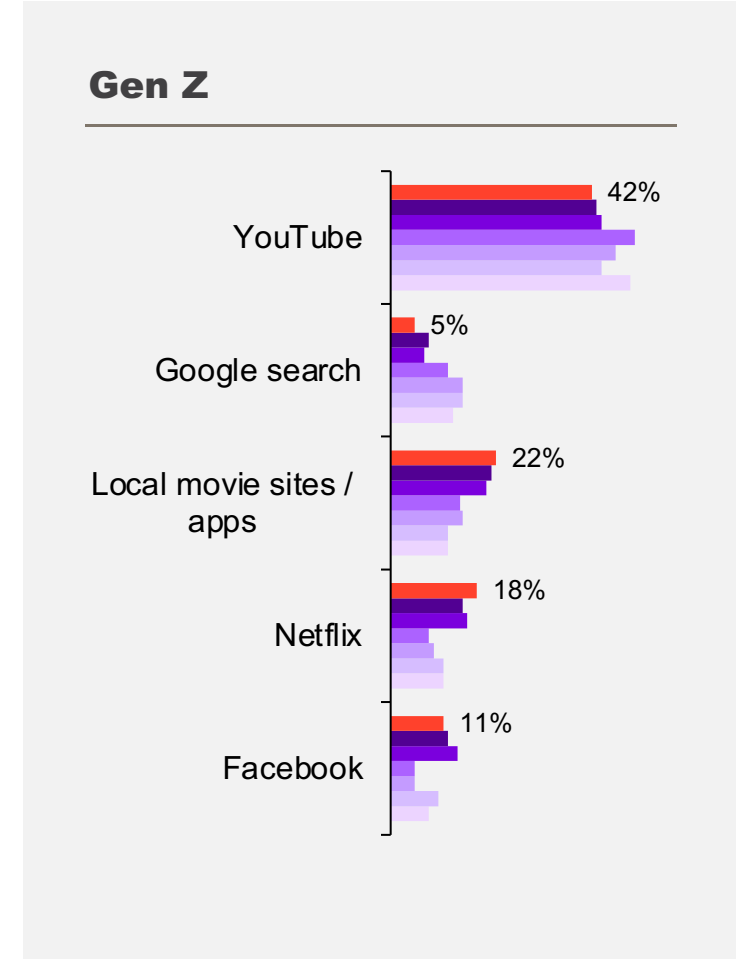
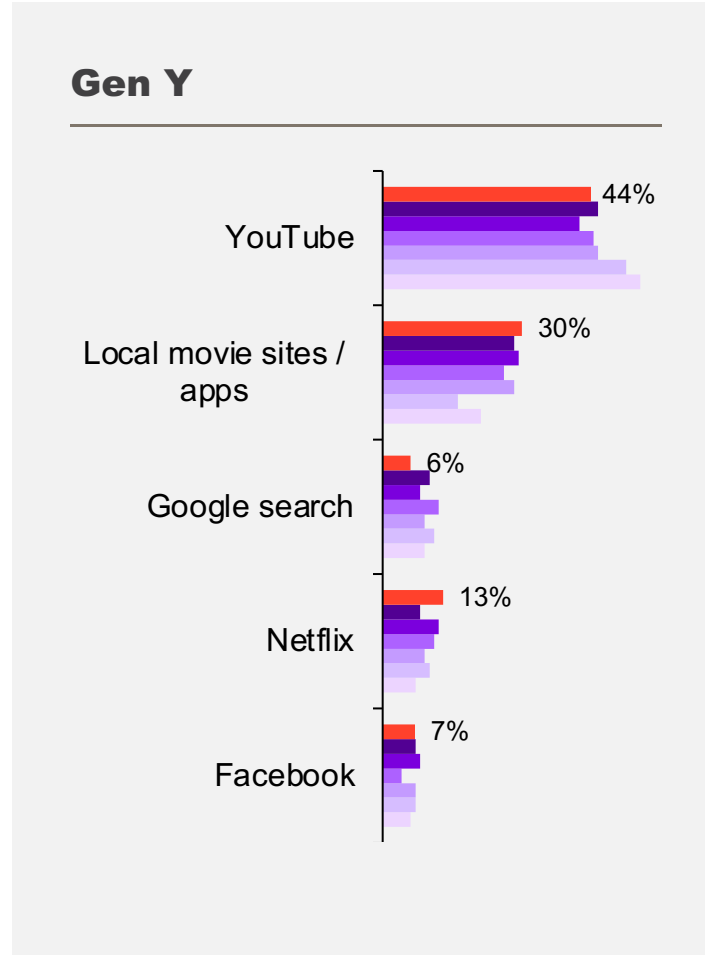
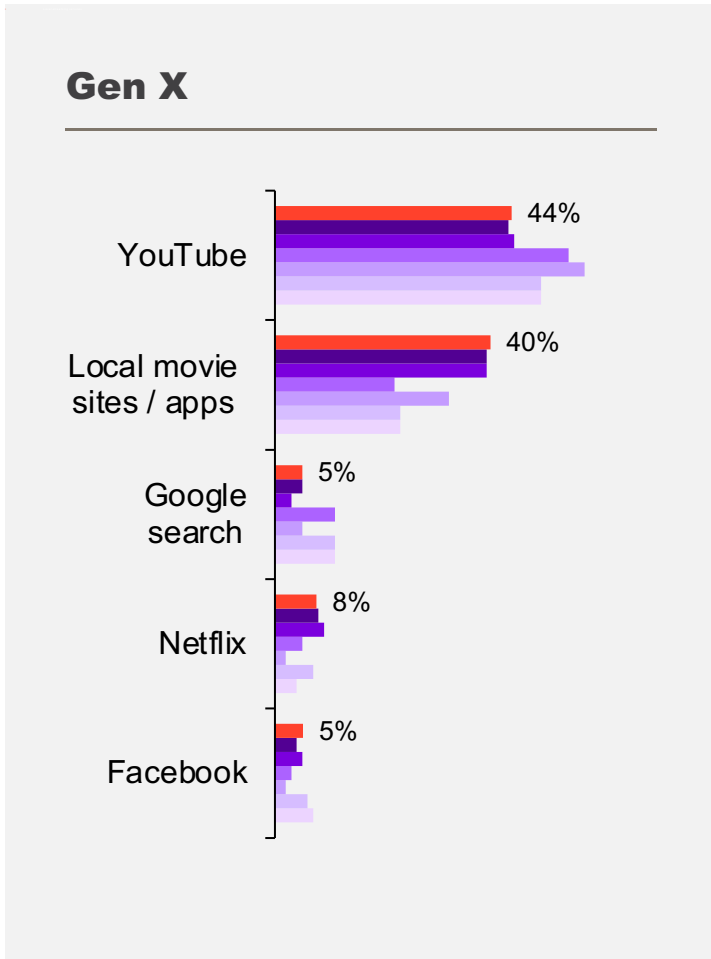


Q: Which of the following apps do you use most often to watch movies?

\*Local platforms include: FPT Play, VTV Go, K+, Keeng, MyTV Net, Viettel TV, Fim+/Galaxy Play, & VieON

Q3 2022 n=1507

# Preference for Netflix as a go-to movie-streaming platform can be seen most clearly among Millennial and Gen Z users.



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

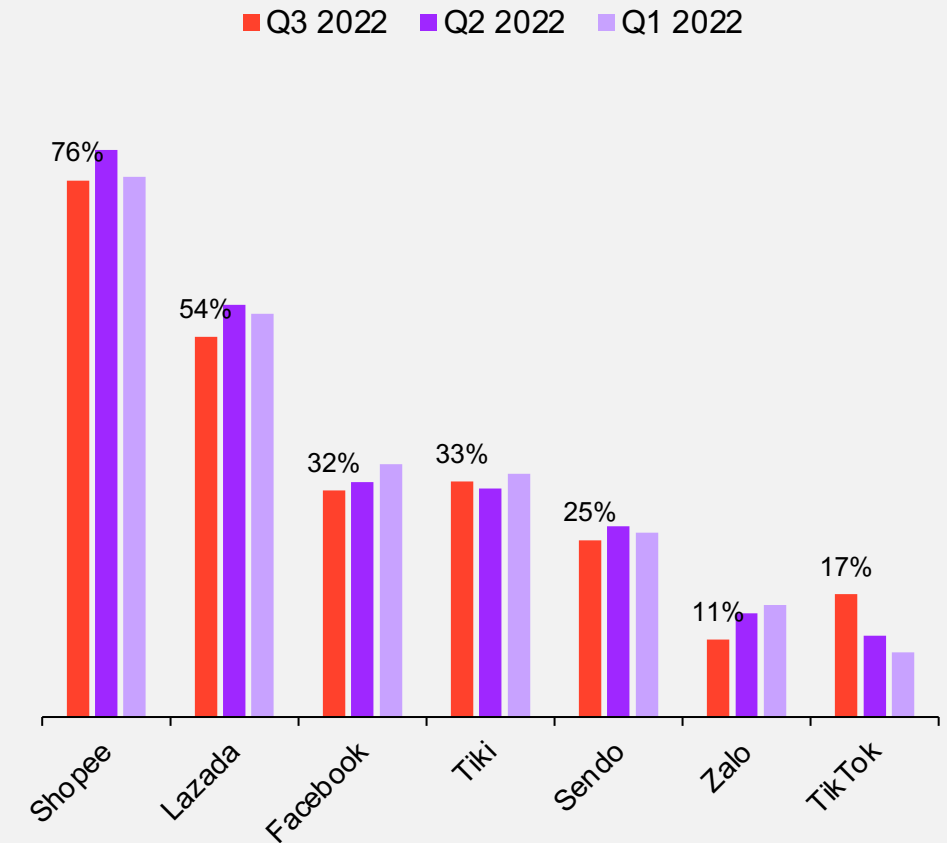
■ Q1 2021 
 ■ Q2 2021 
 ■ Q3 2021 
 ■ Q4 2021 
 ■ Q1 2022 
 ■ Q2 2022 
 ■ Q3 2022 
 Gen Z n=453; Gen Y n=638; Gen X n=416



# E-Commerce Platforms

The e-commerce newcomer TikTok saw a meteoric growth of 6pp in penetration rates in Q3 2022.

Top platforms for E-commerce—Penetration rates



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

Q3 2022 n=1507

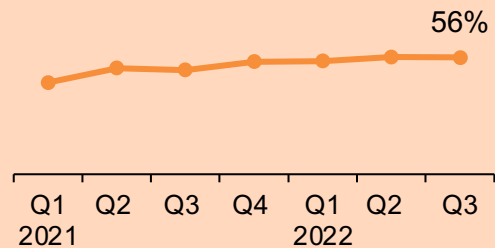
## The Top 3 favored e-commerce platforms remained stable from previous quarters.

### Shopee

Q3 2022

**56%**

+0%

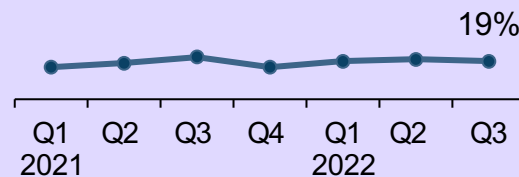


### Lazada

Q3 2022

**20%**

-1%

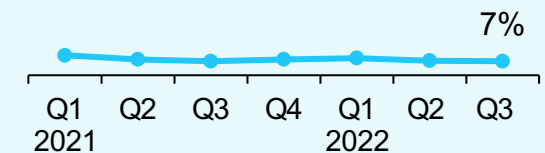


### Facebook

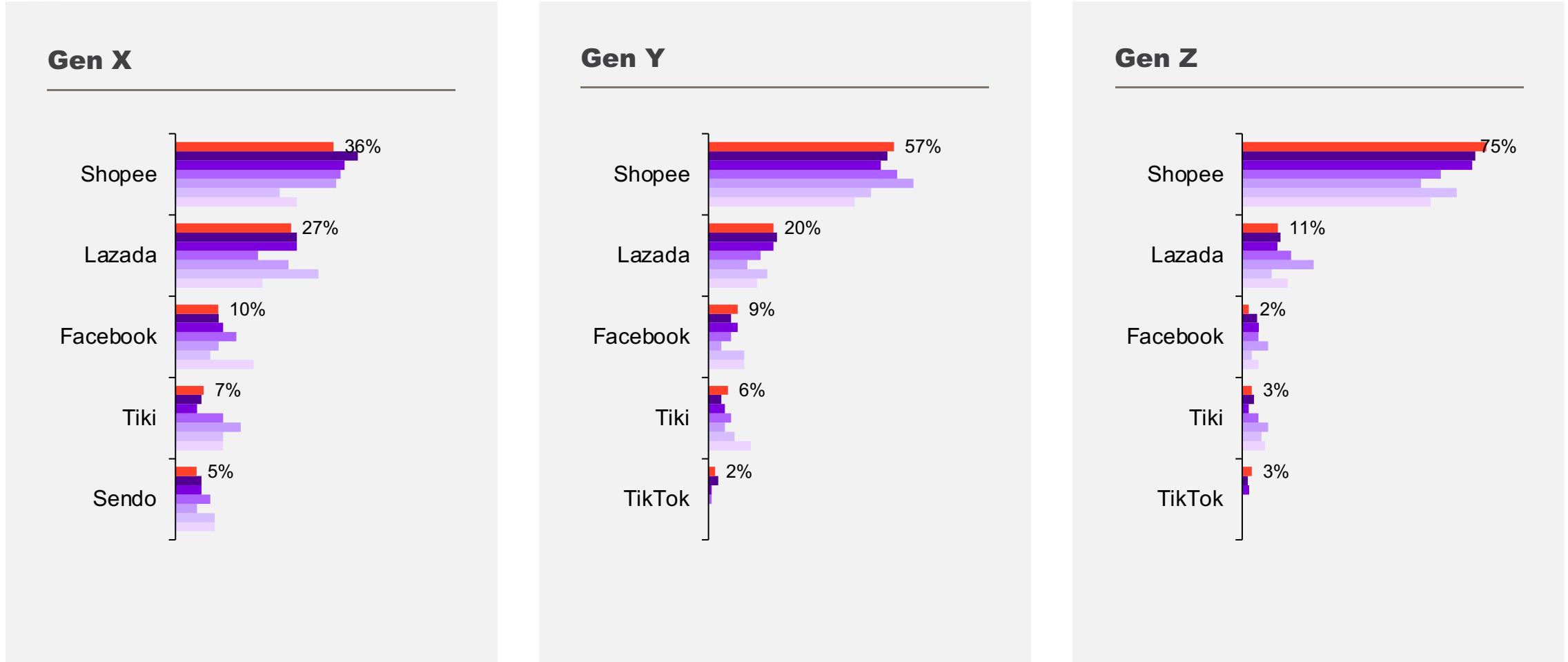
Q3 2022

**7%**

+0%



# While Shopee continued to rise in preference among Gen Y and Gen Z, it's losing Gen X's interests. Preference for TikTok e-commerce was marginally detectable for younger age groups.



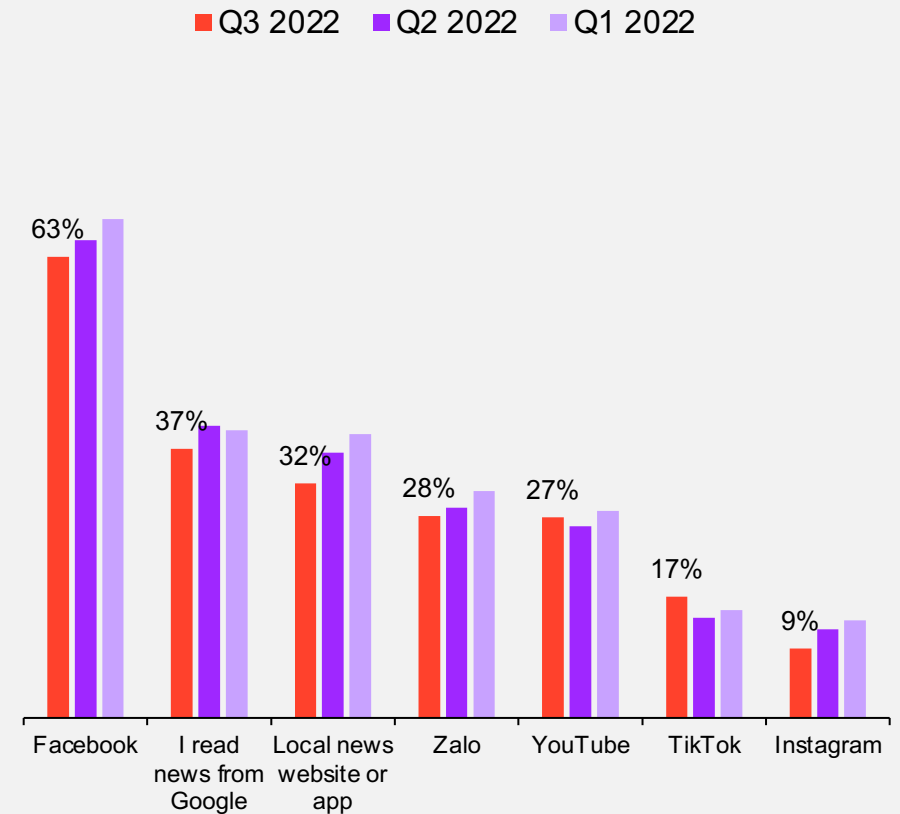
Q: Which of the following platforms/apps do you use most often for online shopping?

Legend: Q1 2021 (lightest purple), Q2 2021, Q3 2021, Q4 2021, Q1 2022, Q2 2022, Q3 2022 (darkest purple/red). Gen Z n=453; Gen Y n=638; Gen X n=416

# News

**Penetration rates for news reading continued to wane in Q3 2022. At the same time, TikTok gained 3% more users.**

## Top platforms for news—Penetration rates



Q: Which websites/apps do you use to read news?  
Choose all that apply.

Q3 2022 n=1507

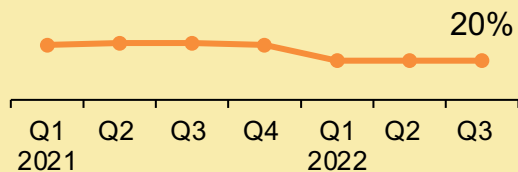
# Preference for local publishers continued to decrease by 1pp in Q3 2022.

## Google Search

Q2 2022

20%

+0%

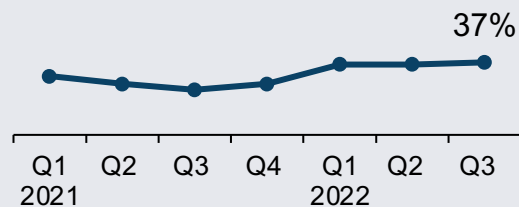


## Facebook

Q2 2022

36%

+0%

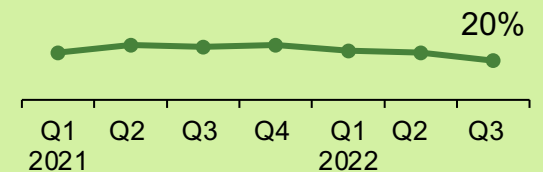


## Local publishers

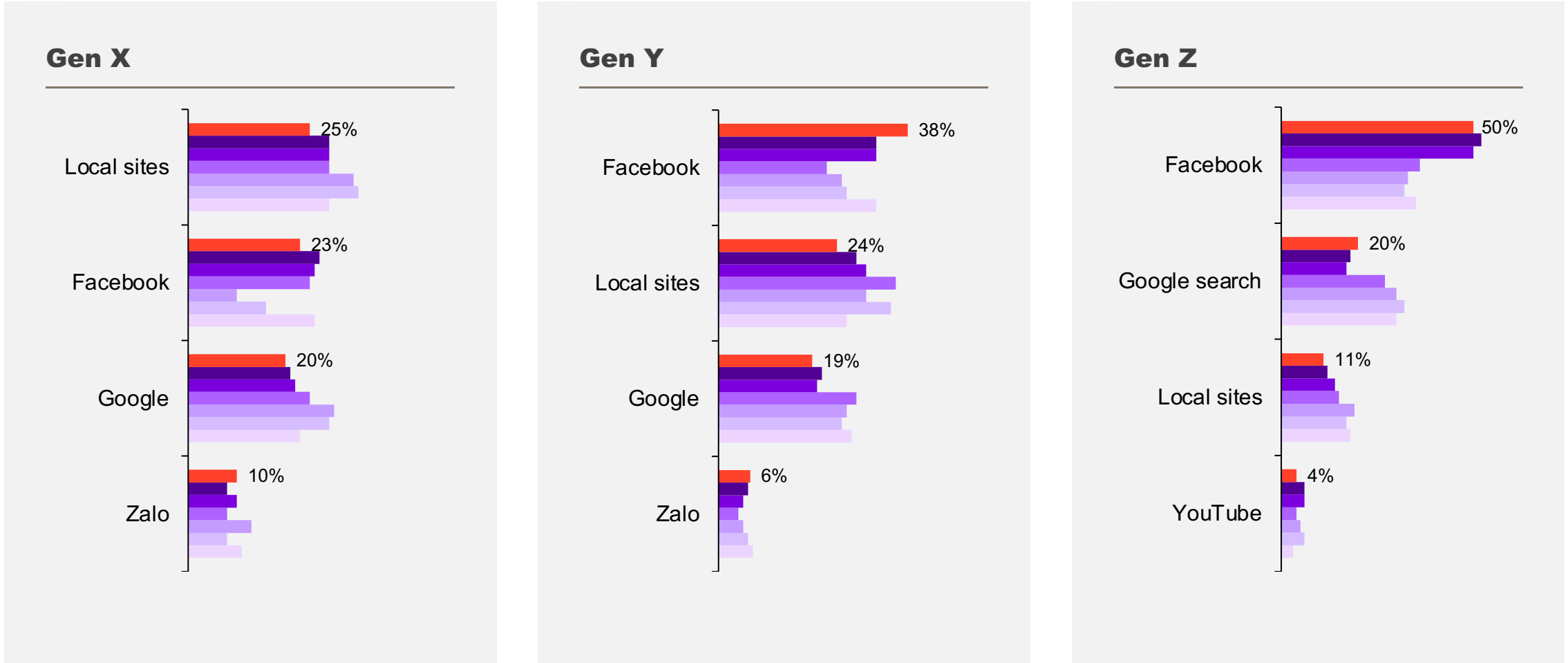
Q2 2022

25%

-1%



# Following a growth in usage, preference for Facebook as a news source also grew strongly among Gen Y.



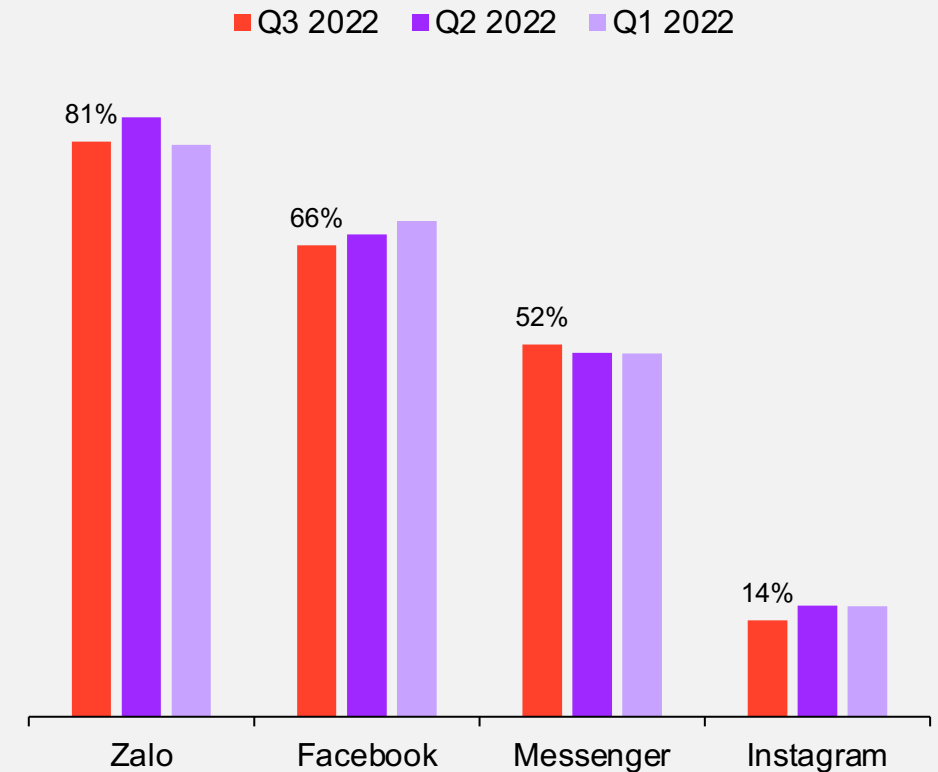
Q: Which websites/apps do you use most often to read news?

■ Q1 2021 
 ■ Q2 2021 
 ■ Q3 2021 
 ■ Q4 2021 
 ■ Q1 2022 
 ■ Q2 2022 
 ■ Q3 2022 
 Gen Z n=453; Gen Y n=638; Gen X n=416

# Messaging

**Zalo remains the most used messaging app despite losing 3pp of penetration in Q3 2022.**

**Top platforms for news—Penetration rates**



Q: Which websites/apps do you use to connect with friends and family? Choose all that apply.

Q3 2022 n=1507



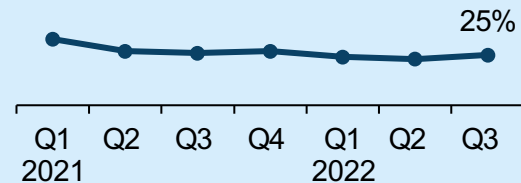
## Zalo's overall preference dropped by 4pp, after peaking at 50% in the previous quarter.

### Facebook

Q3 2022

**25%**

**+2%**

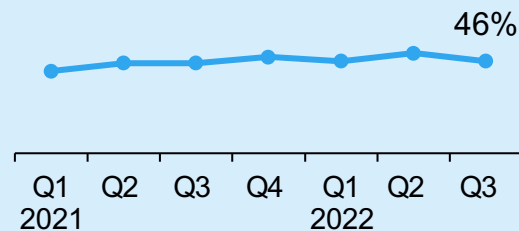


### Zalo

Q3 2022

**46%**

**-4%**

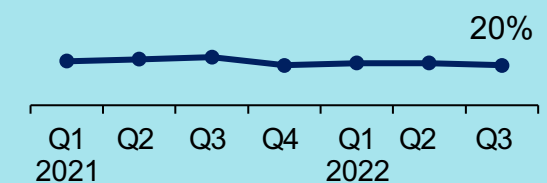


### Messenger

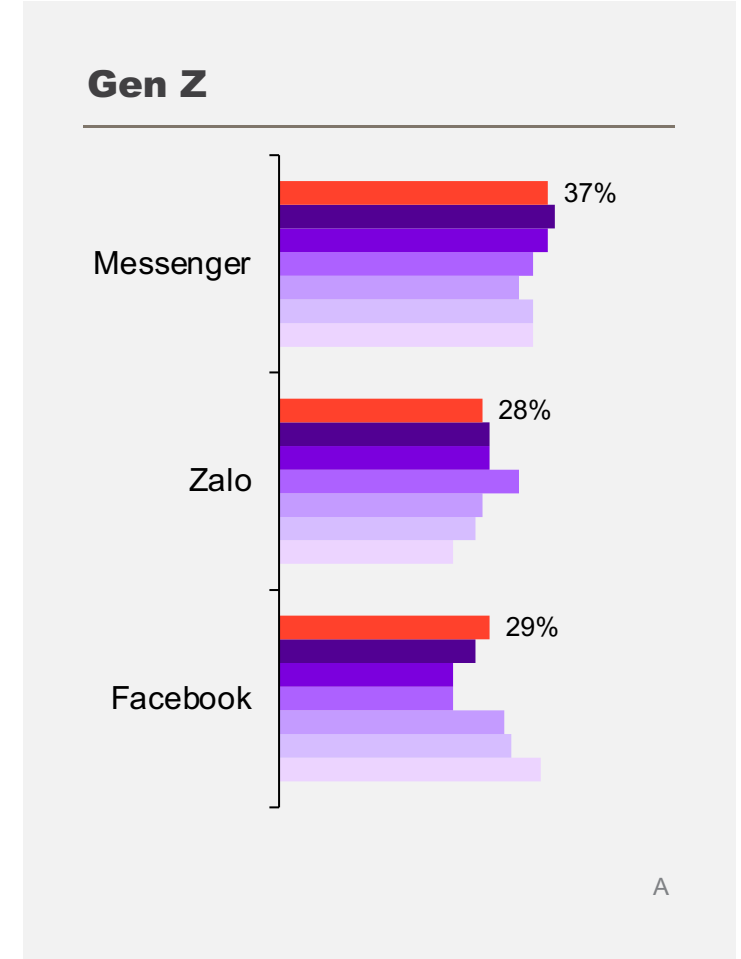
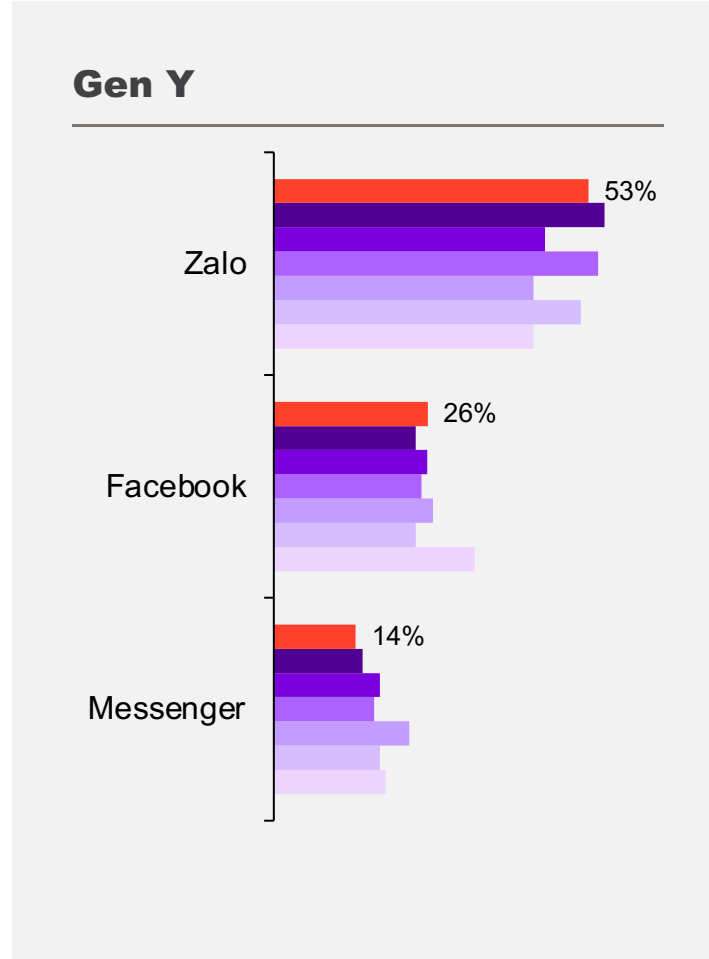
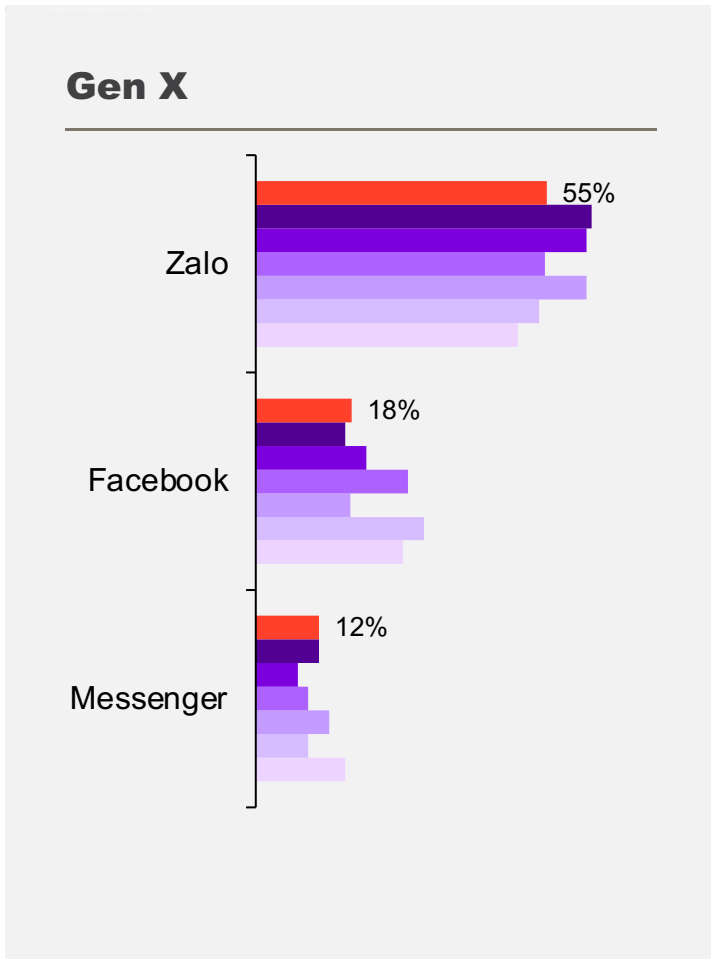
Q3 2022

**20%**

**-1%**



# Gen X and Gen Y showed less preference for Zalo, which has been the key messaging app for these age groups.



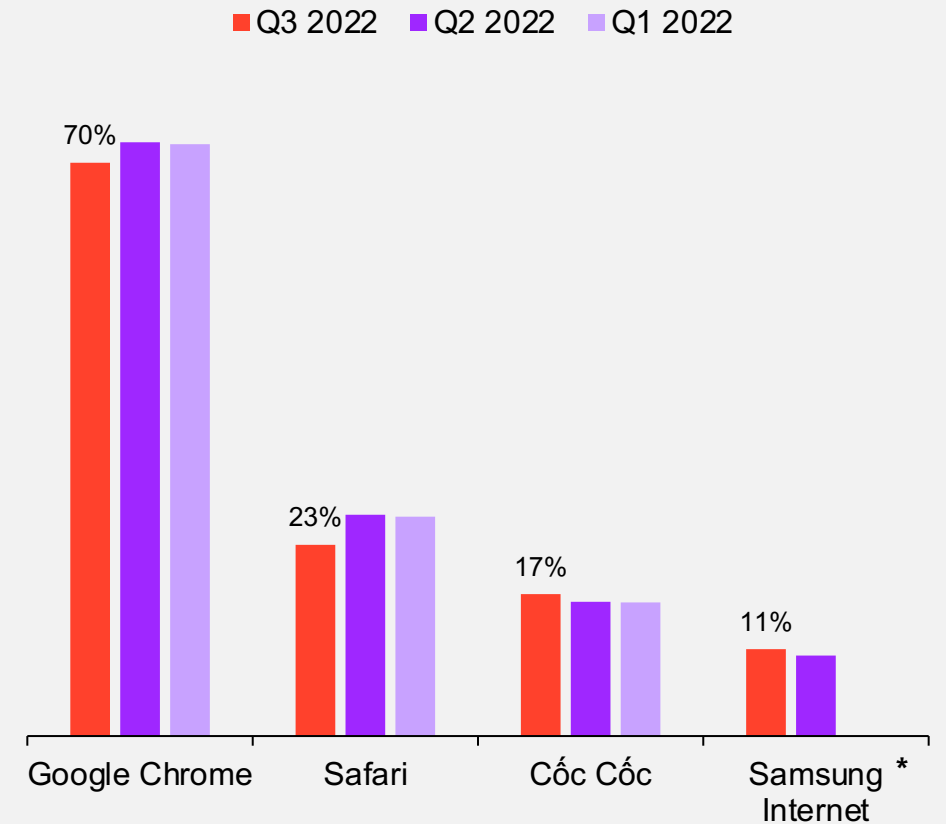
Q: Which of the following platforms do you use most often to connect with friends and family?

Q1 2021 Q2 2021 Q3 2021 Q4 2021 Q1 2022 Q2 2022 Q3 2022 Gen Z n=453; Gen Y n=638; Gen X n=416

# Mobile browser

Overall usage of top mobile browser platforms remain stable with Coc Coc Mobile increasing slightly in penetration.

### Top mobile browsers—Penetration rates



Q: Which browsers do you use on your mobile device?  
Choose all that apply.

Q3 2022 n=1507

\*Samsung Internet's Q1'22 statistics are missing because we started tracking Samsung Internet in Q2'22

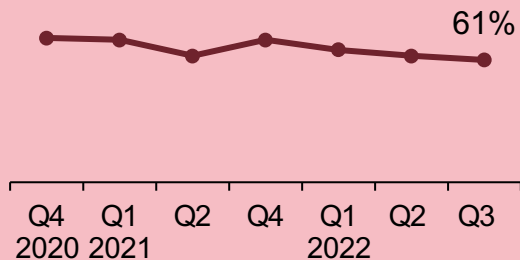
# Coc Coc Mobile also gained a 1pp increase in preference in Q3 2022.

## Chrome

Q3 2022

**61%**

**-2%**

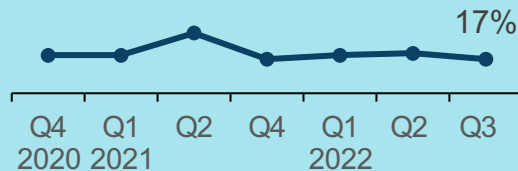


## Safari

Q3 2022

**17%**

**-3%**

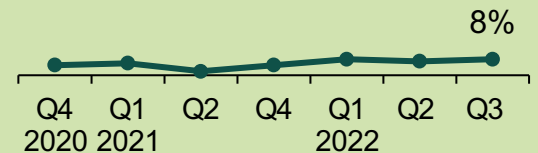


## Cốc Cốc

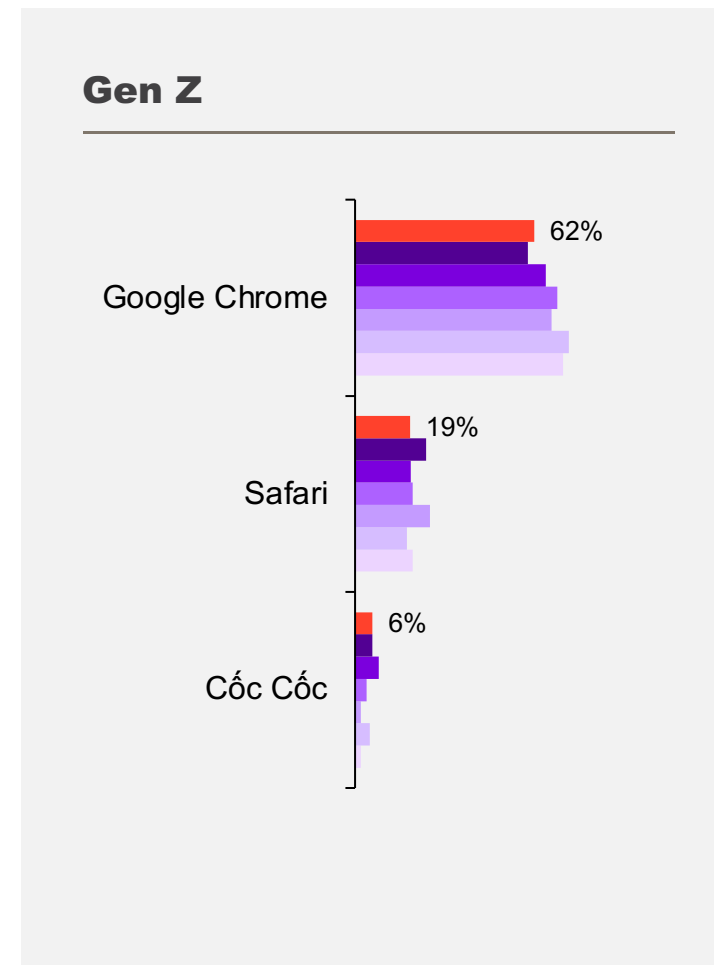
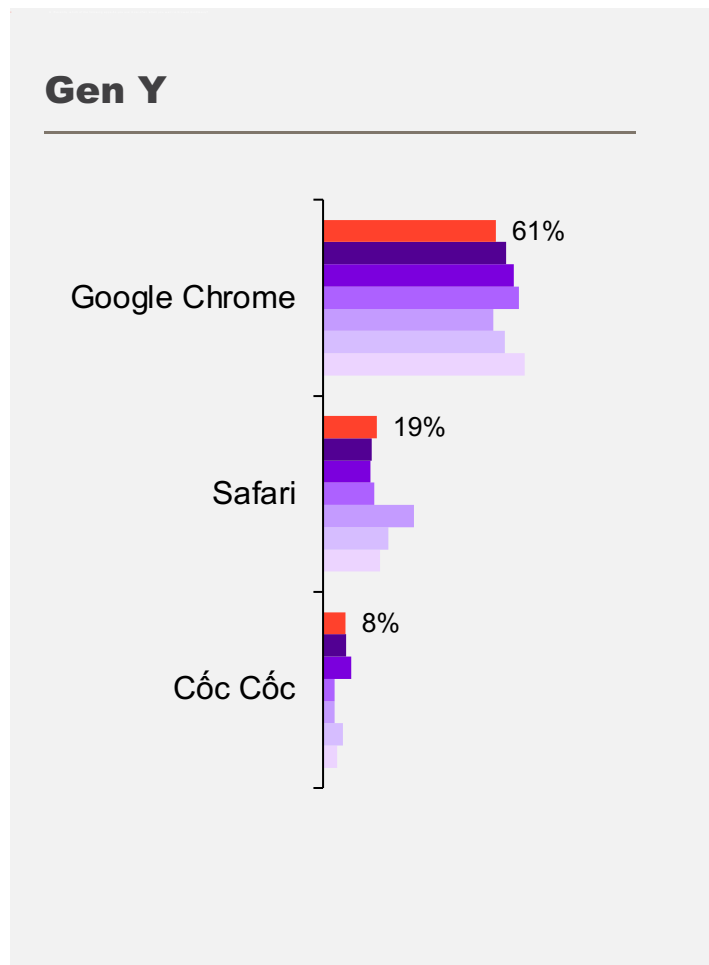
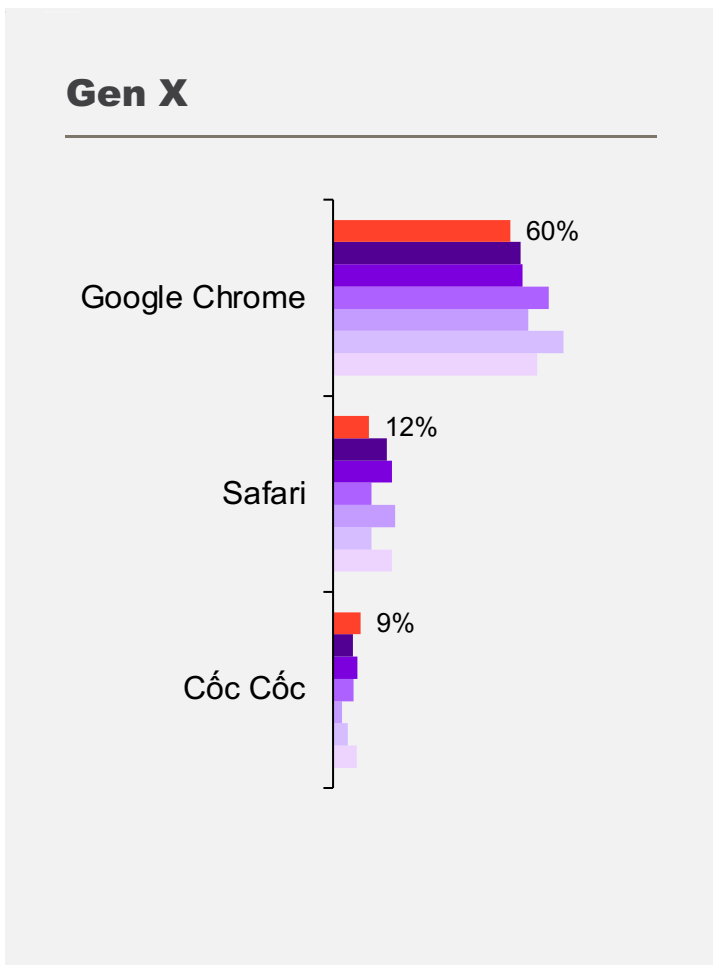
Q3 2022

**8%**

**+1%**



# Preference for Coc Coc Mobile was seen only among Gen X users.



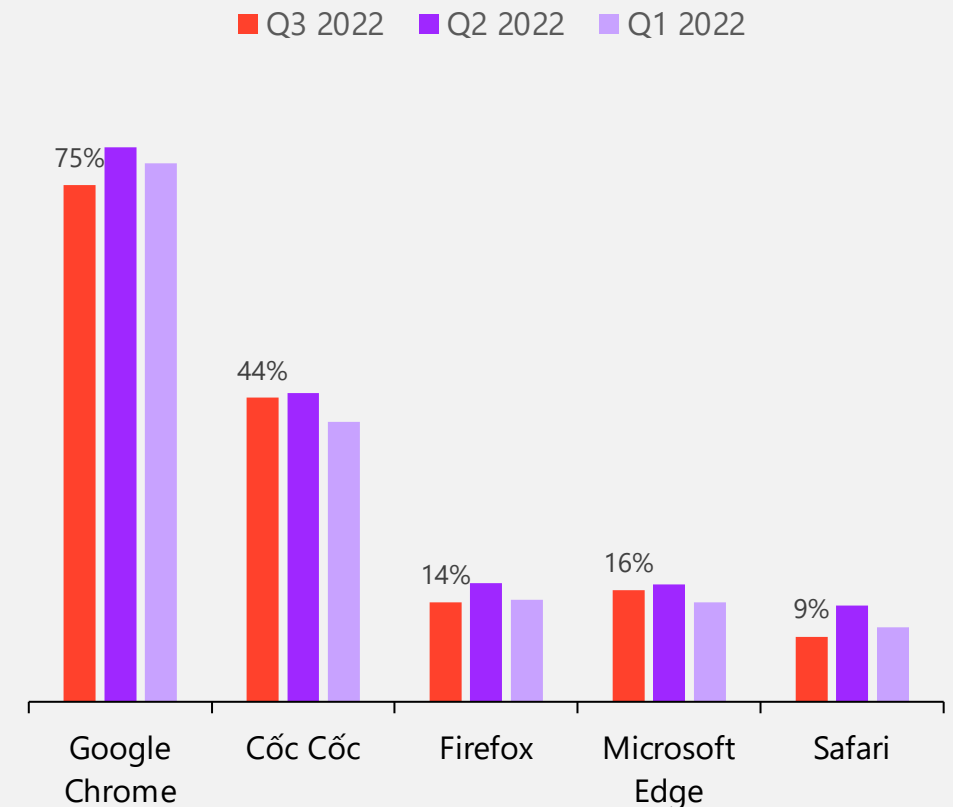
Q: Which browsers do you use most often on your mobile device?

■ Q1 2021 
 ■ Q2 2021 
 ■ Q3 2021 
 ■ Q4 2021 
 ■ Q1 2022 
 ■ Q2 2022 
 ■ Q3 2022 
 Gen Z n=453; Gen Y n=638; Gen X n=416

# Desktop browser

**Penetration rates of desktop browsers dropped across platforms. Coc Coc and Edge were the only platforms to net a positive increase compared to Q1 2022, despite the downturn in Q3 2022.**

### Top Desktop browsers—Penetration rates



Q: Which browsers do you use on your personal computer? Choose all that apply.

Q3 2022 n=1507

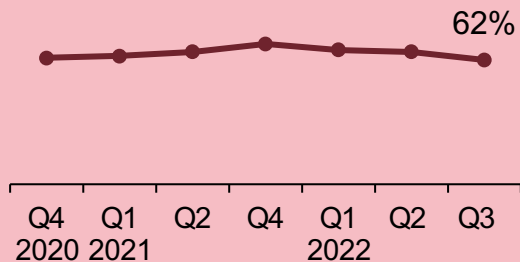
## Much like for Coc Coc Mobile, Coc Coc Desktop also gained a 1pp increase in preference in Q3 2022.

### Chrome

Q3 2022

**62%**

**-4%**

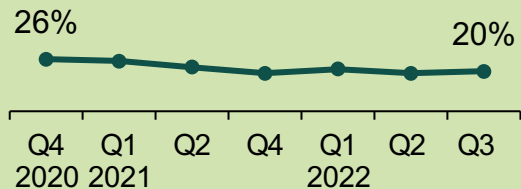


### Cốc Cốc

Q3 2022

**20%**

**+1%**

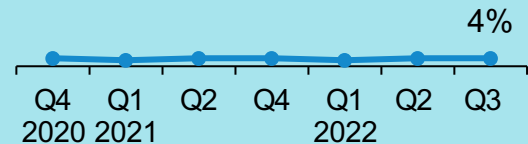


### Safari

Q3 2022

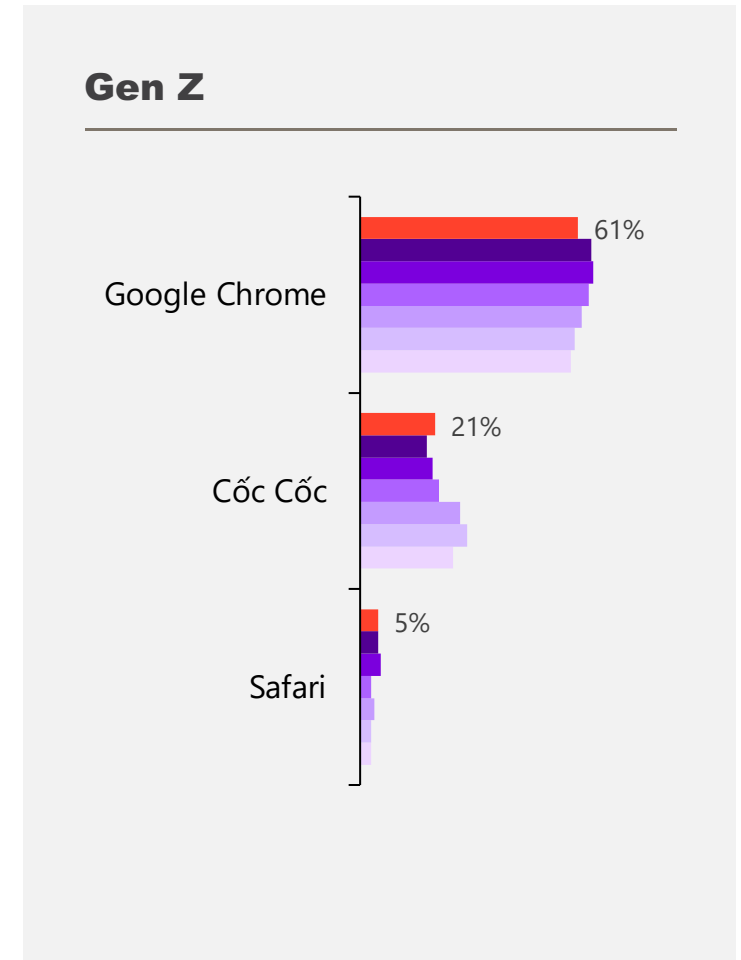
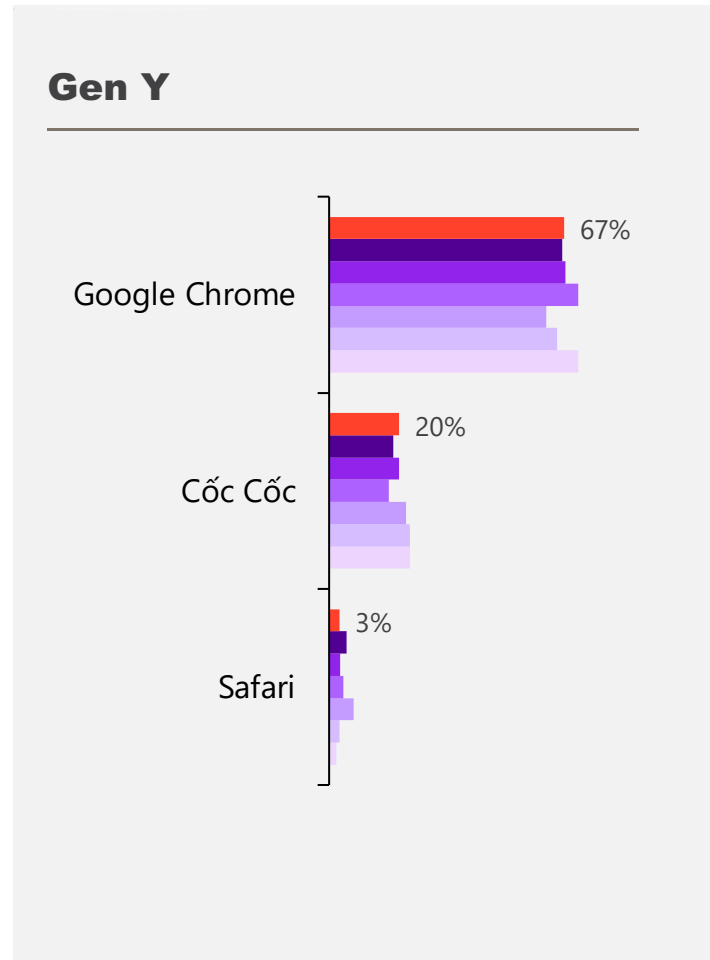
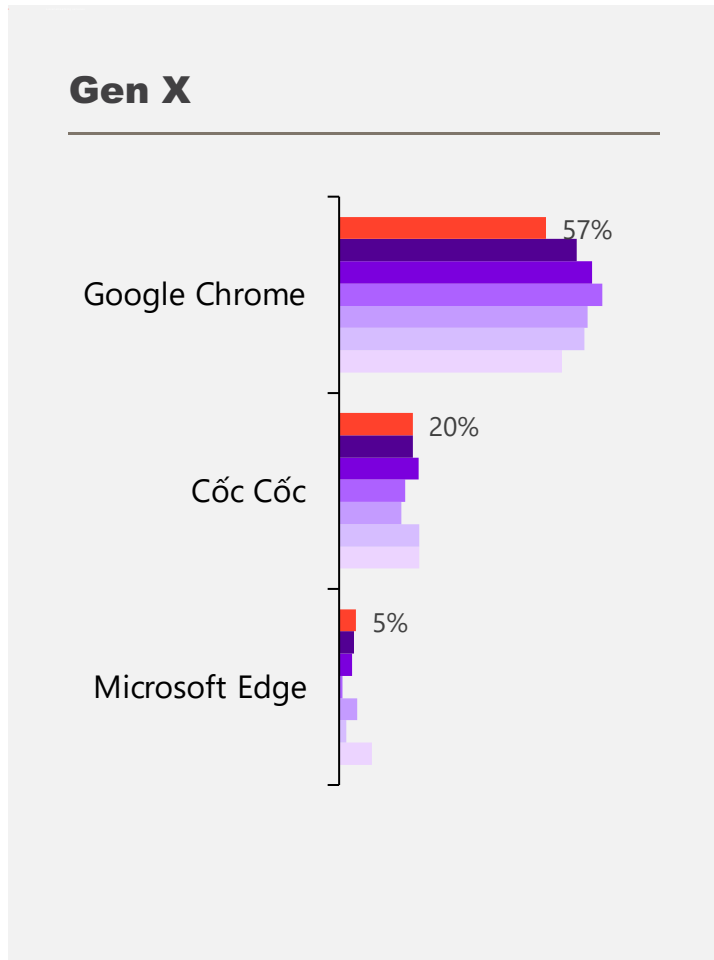
**4%**

**+0%**





# Gen Y (+4pp) and Gen Z (+3pp) expressed more preference towards Coc Coc Desktop in Q3 2022.



Q: Which browsers do you use most often on your personal computer?

■ Q1 2021 
 ■ Q2 2021 
 ■ Q3 2021 
 ■ Q4 2021 
 ■ Q1 2022 
 ■ Q2 2022 
 ■ Q3 2022 
 Gen Z n=453; Gen Y n=638; Gen X n=416

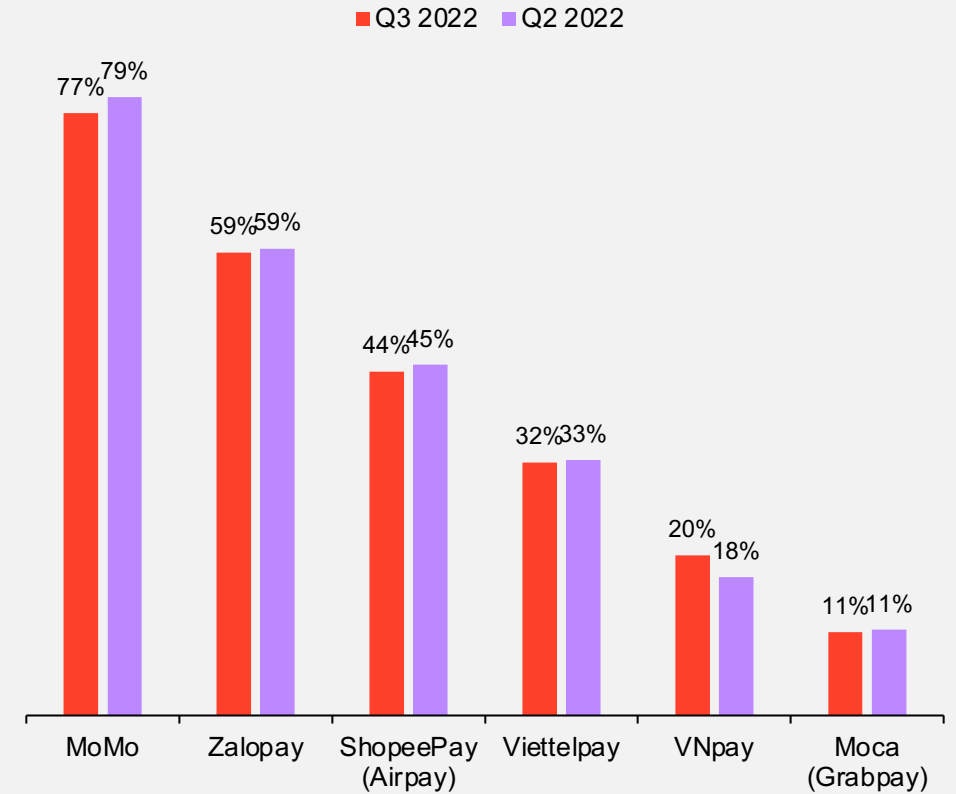
# E-wallet

In a relatively stable E-wallet landscape, VNPay gained 2% more users in Q3 2022.

Penetration

Preference

## Top e-wallets—Penetration rates\*



Q: Which E-Wallets do you use? Choose all that apply.

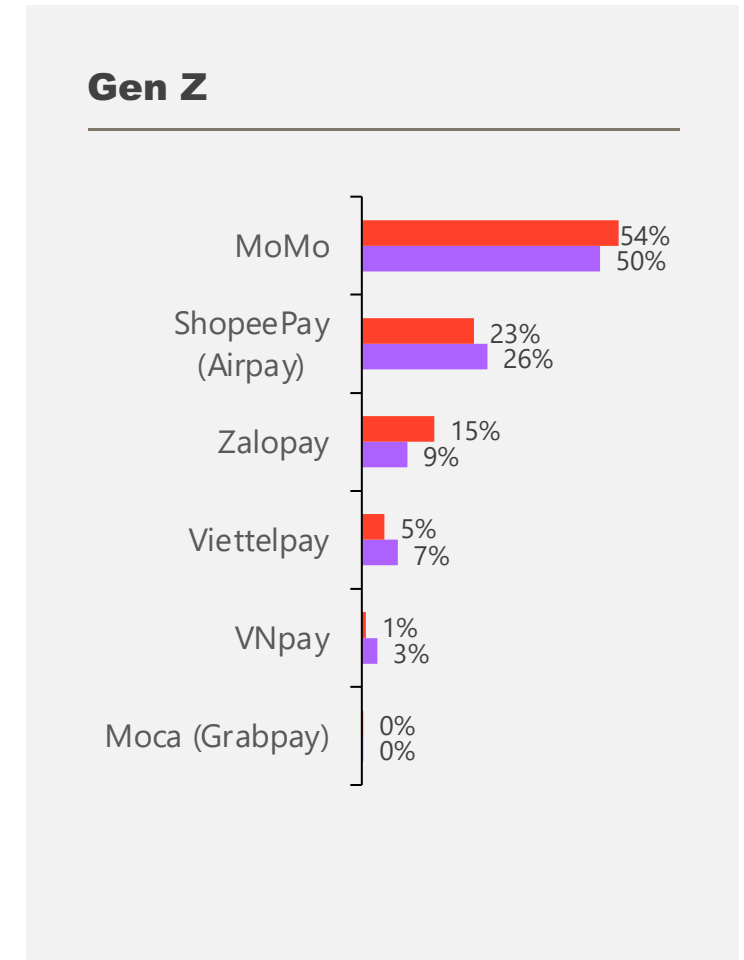
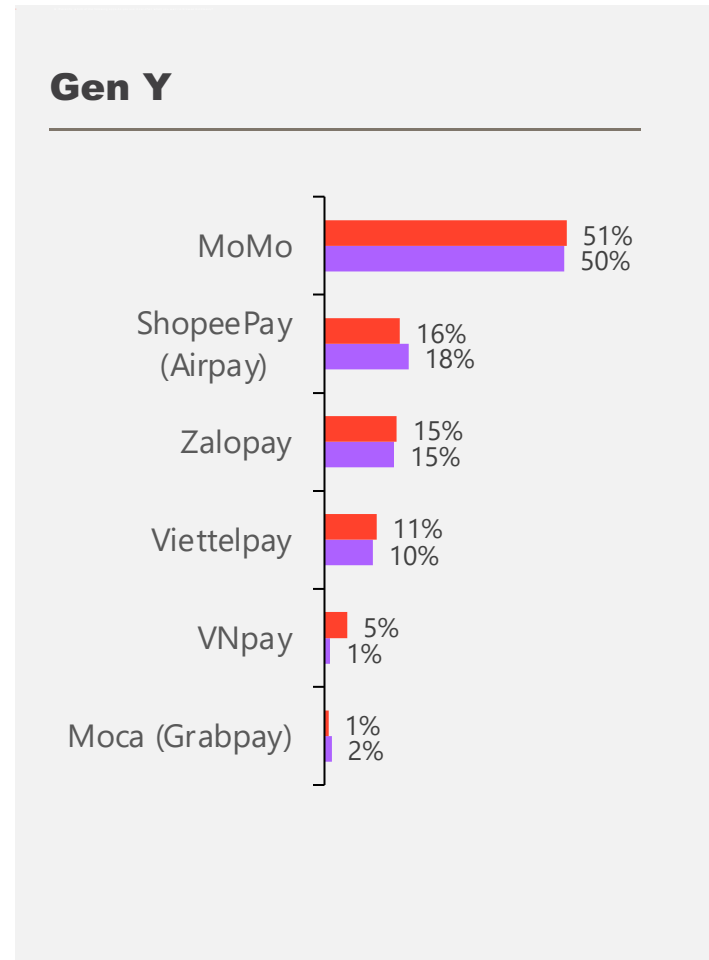
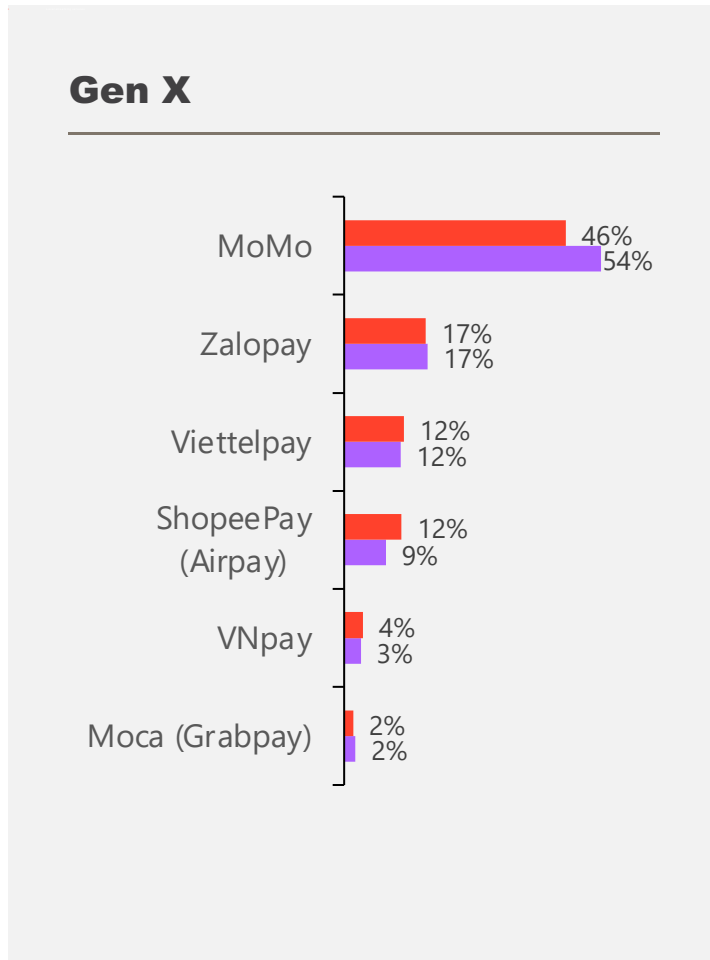
\*Penetration rates reported for those who currently use E-wallets

Q3 2022 n=910

## ZaloPay gained 2pp increase in preference as Vietnam's second-most favorite e-wallet.



# Preference for ZaloPay among Gen Z jumped 7pp in Q3 2022, while VN Pay appeared to be garnering favorability from Gen Y.



Q: Which e-wallets do you use most often?

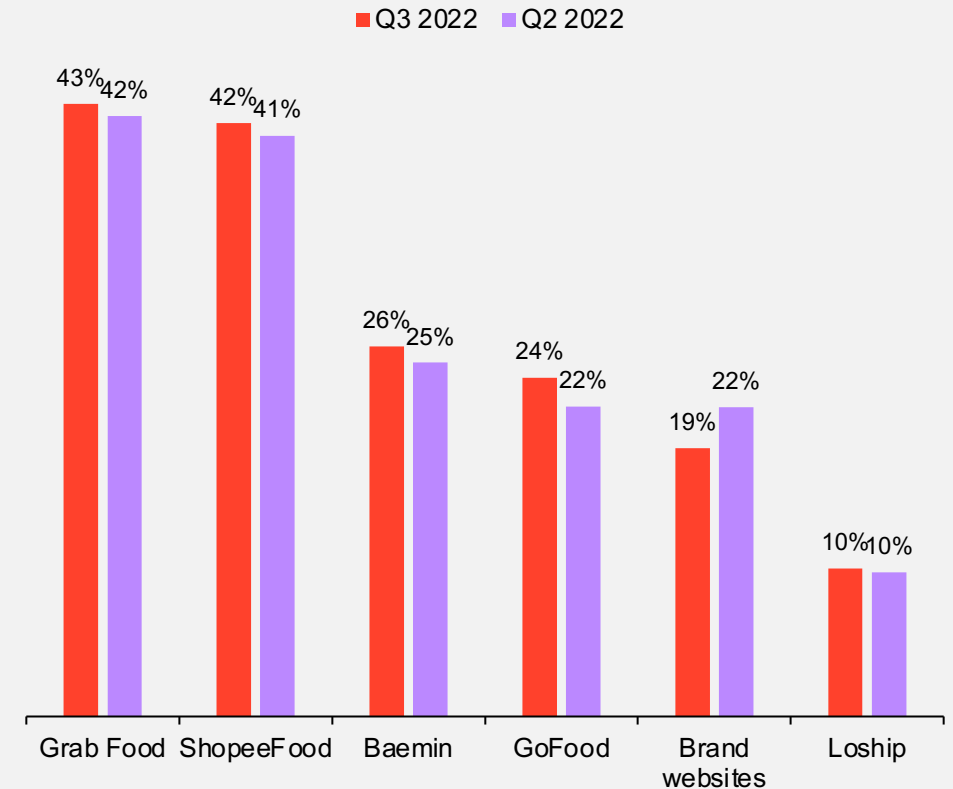
■ Q2 2022 ■ Q3 2022

Gen Z n=284; Gen Y n=406; Gen X n=220

# Food Delivery Apps

Food delivery usage increased across platforms in Q3 2022.

Top food delivery apps—Penetration rates



Q: Which food delivery apps do you use? Choose all that apply.

Q3 2022 n=1507

## All top 3 food delivery apps saw growth in favorability in Q3 2022, while Grab Food and ShopeeFood maintained an equal footing.

### Grab Food

Q3 2022

**32%**

+1%

Q2 2022

**31%**

### ShopeeFood

Q3 2022

**32%**

+1%

Q2 2022

**31%**

### Baemin

Q3 2022

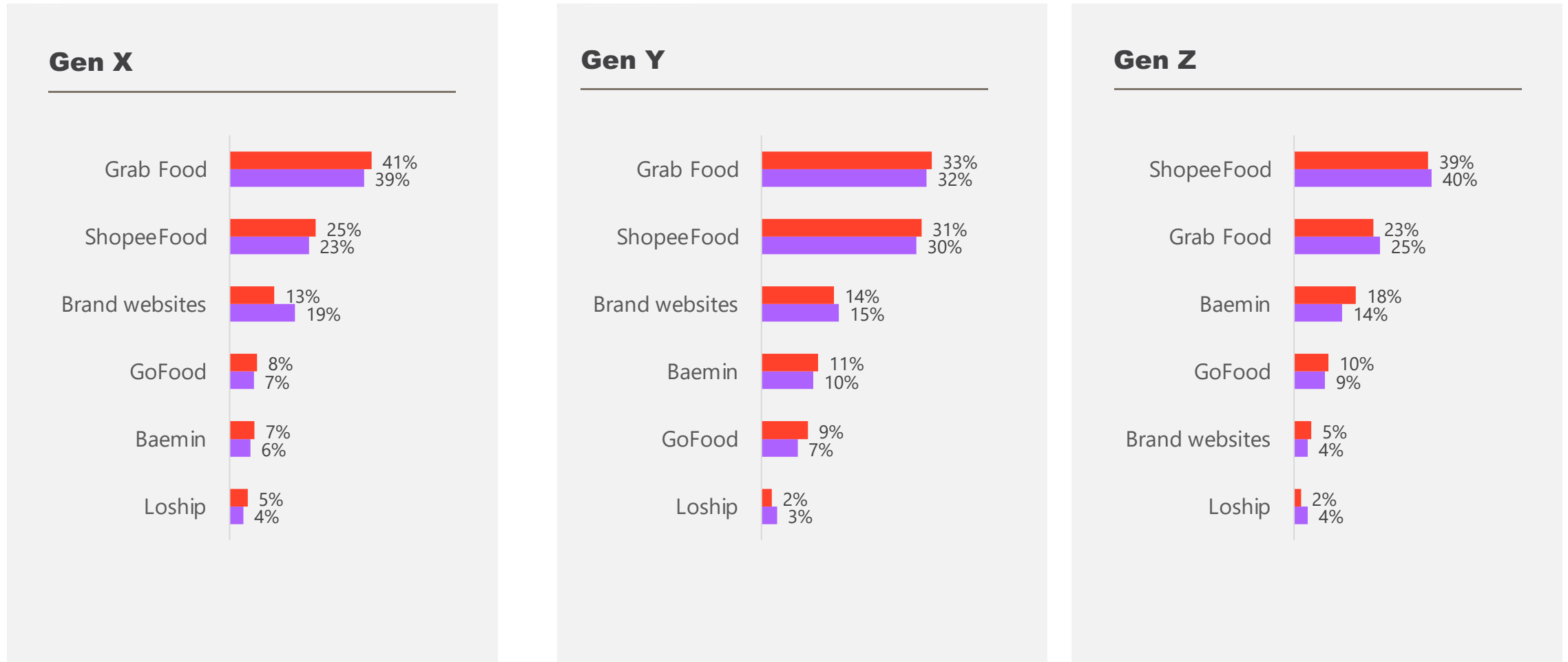
**12%**

+2%

Q2 2022

**10%**

# Preference for Baemin as a food delivery platform increased across age groups in Q3 2022.



Q: Which food delivery app do you use most often?

■ Q2 2022 ■ Q3 2022

Gen Z n=453; Gen Y n=638; Gen X n=416

# Recommendations for brands

## 1

TikTok appears to be the new everything app for Vietnamese consumers. As the platform commands high levels of audience engagement, brands can also explore reaching consumers on TikTok as part of their marketing plans.

## 2

Online commerce appears to be losing its luster as consumers return to other modes of commerce, while also facing increasing inflation pressures. As such, brands may want to reevaluate their e-commerce strategies for the time being.

## 3

Food delivery remains a growing category. This has product distribution implications for F&B businesses and presents advertising opportunities for brands.



We help Vietnam's most recognized brands, media owners, and agencies to

**explore, plan,  
and track**

**marketing activities, better.**

## OUR OFFERINGS

### Explore

Explore & tackle business challenges with agile & custom marketing research solutions.

**Sample offerings:**

- Omnibus
- Targeted Field & Tab
- Innovation test
- Creative test
- Path to purchase study
- Touchpoints study

YouGov RealTime | YouGov Custom Research

### Plan

Supercharge your planning with our living dataset of 10,000+ demographic, psychographic, and attitudinal variables.

**Sample offerings:**

- Segmentation study
- Media usage & frequency
- Device usage & frequency
- Channel & media hypotheses
- Attitude & behavior tracking
- Usage & Attitude study

YouGov Profiles

### Track

Keep track of brand and campaign performance with our best-in-class brand tracking solutions.

**Sample offerings:**

- Brand health track
- Funnel analysis
- Campaign measurement
- Cross-media measurement
- Customised tracker

YouGov BrandIndex

# Contact us

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