

The Connected Consumer Q4 2021

PREPARED BY DECISION LAB

JANUARY 2022

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TRACKING THE CONNECTED CONSUMERS

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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

OCT 2021 – DEC 2021

SAMPLE COLLECTION PERIOD

881

TOTAL SAMPLE SIZE

JUL 2021 – SEP 2021

SAMPLE COLLECTION PERIOD

1440

TOTAL SAMPLE SIZE

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

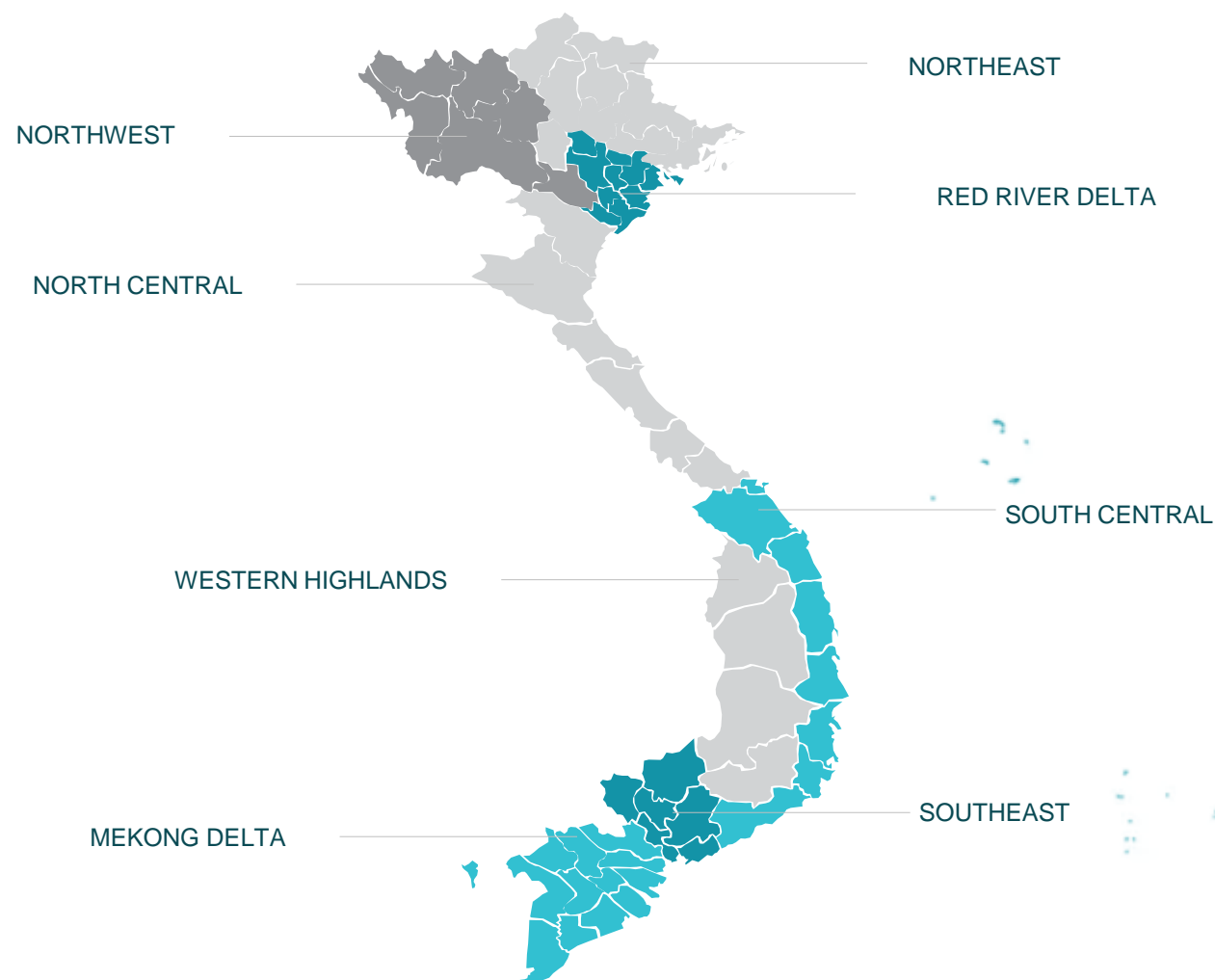
TOTAL SAMPLE SIZE

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

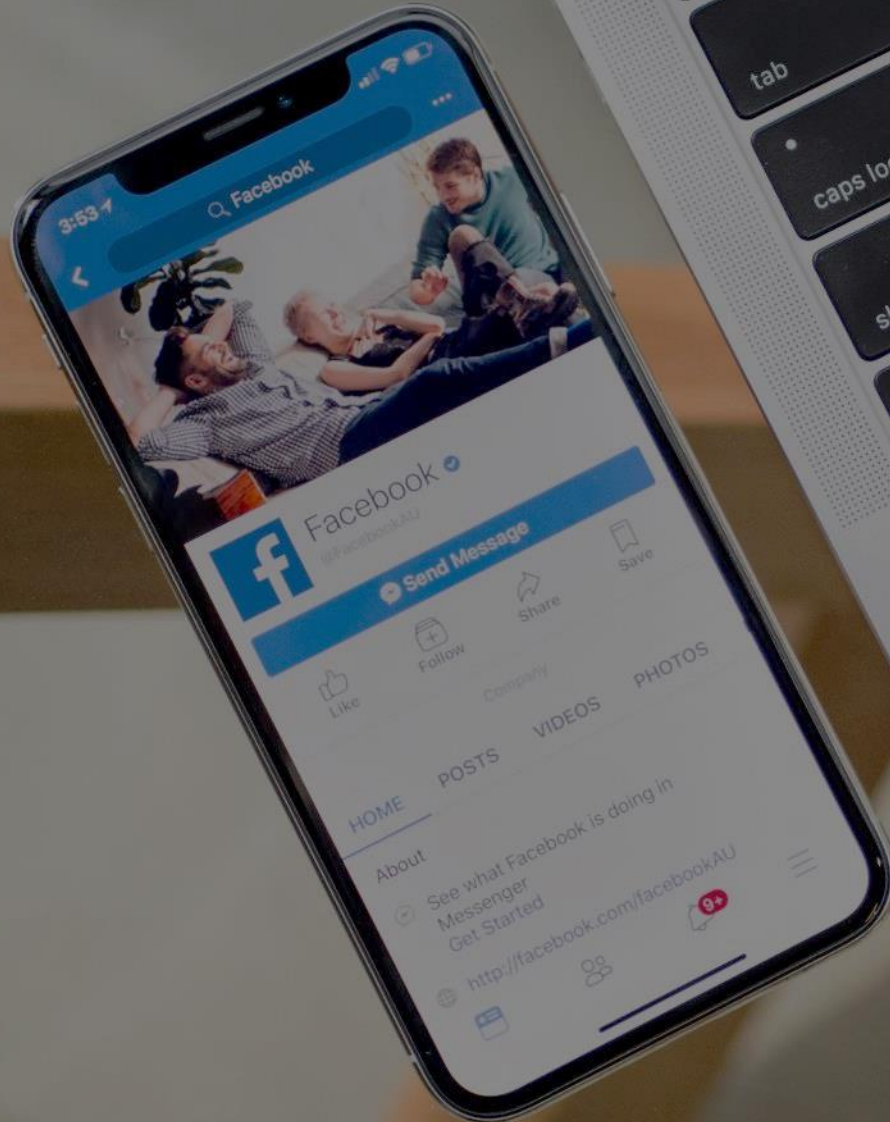
AGE 25 - 40



GEN X

BORN BETWEEN 1960 – 1980

AGE 41 - 61



The Top platforms

TOP PLATFORMS

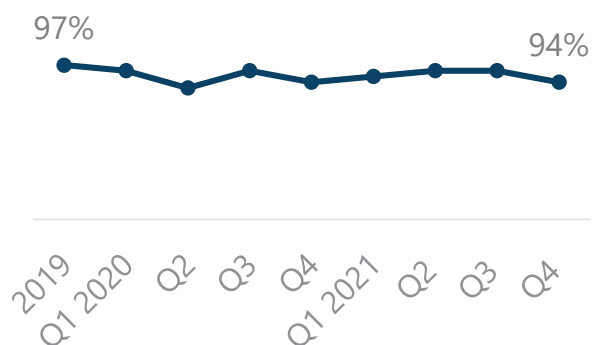
TOP PRIMARY PLATFORMS

PLATFORMS USERS CAN'T LIVE WITHOUT

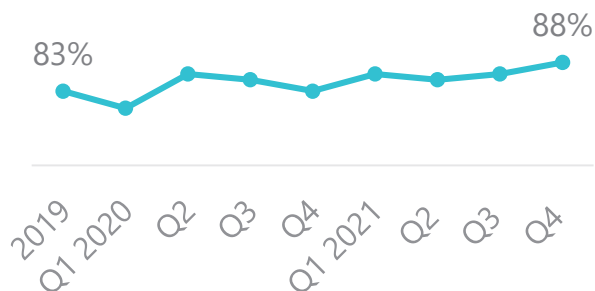
MULTI-PLATFORM USAGE

Zalo experienced a 2%-point increase in popularity in Q4 2021, while Facebook & YouTube saw slight dips.

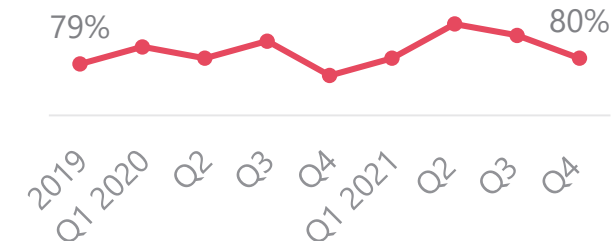
94%
use **facebook**



88%
use **Zalo**

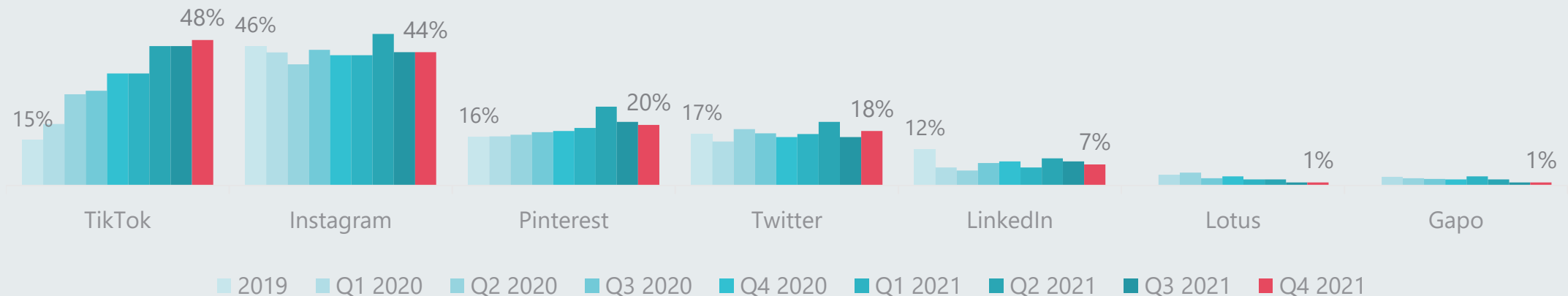


80%
use **YouTube**



TikTok surpassed Instagram for the first time as the fourth-most popular social media platform in Vietnam in Q4 2021.

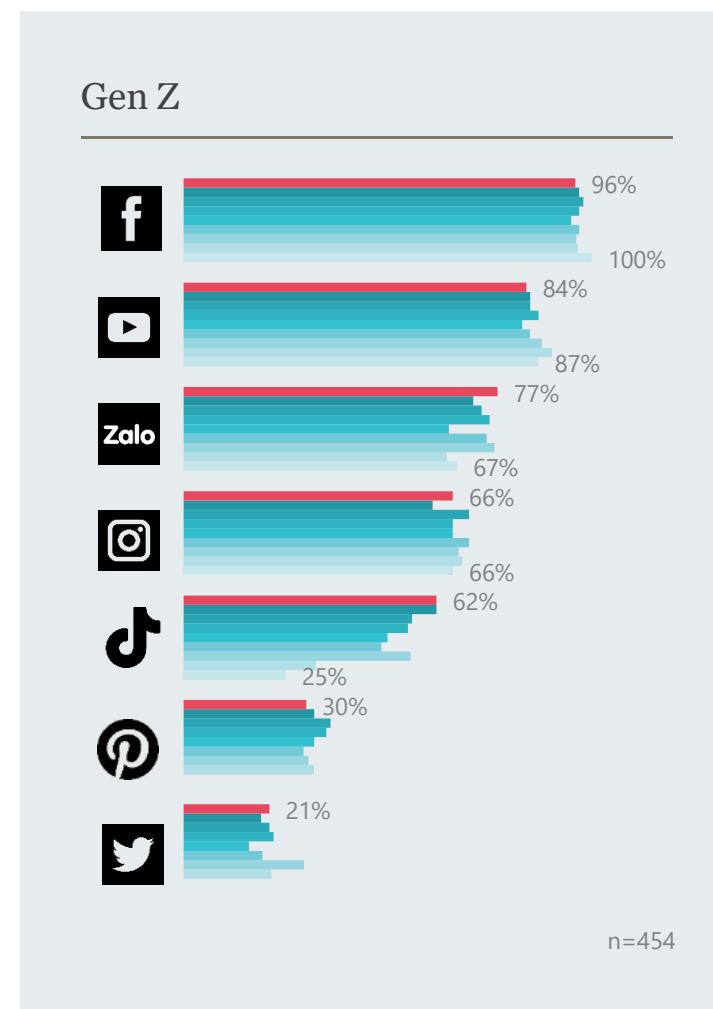
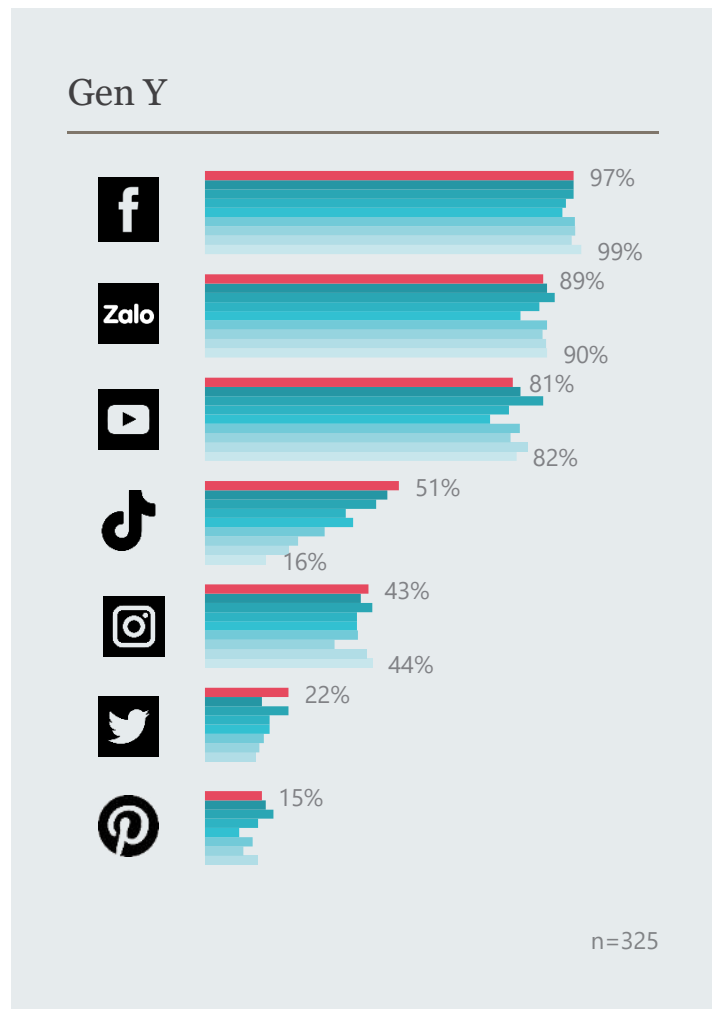
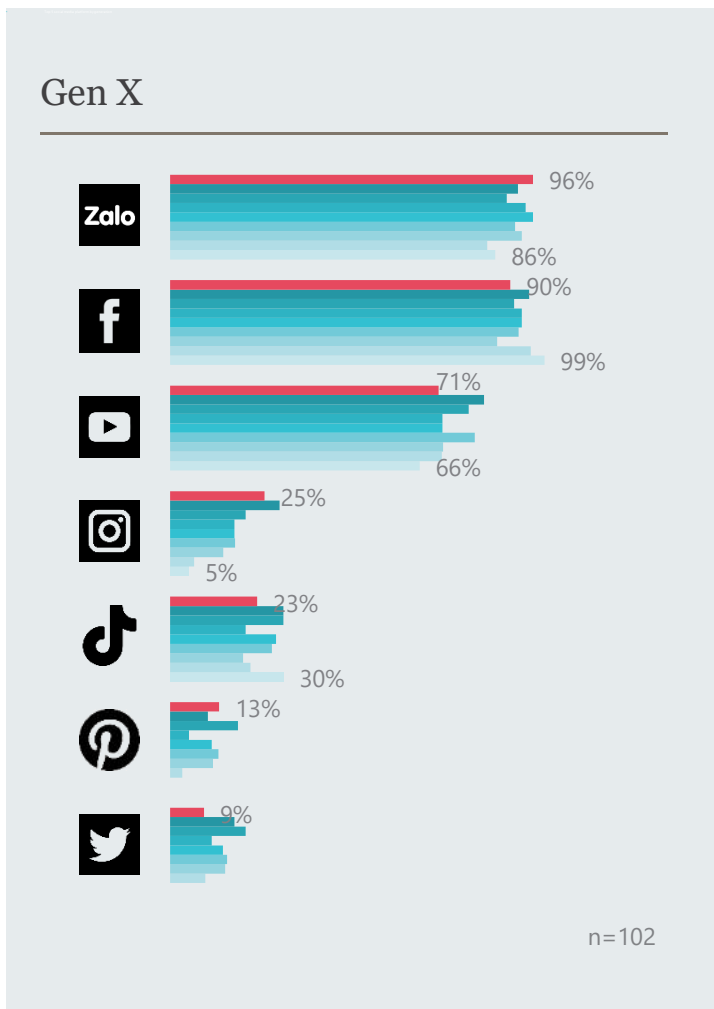
Other popular social media platforms



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

Q4 2021 n=881

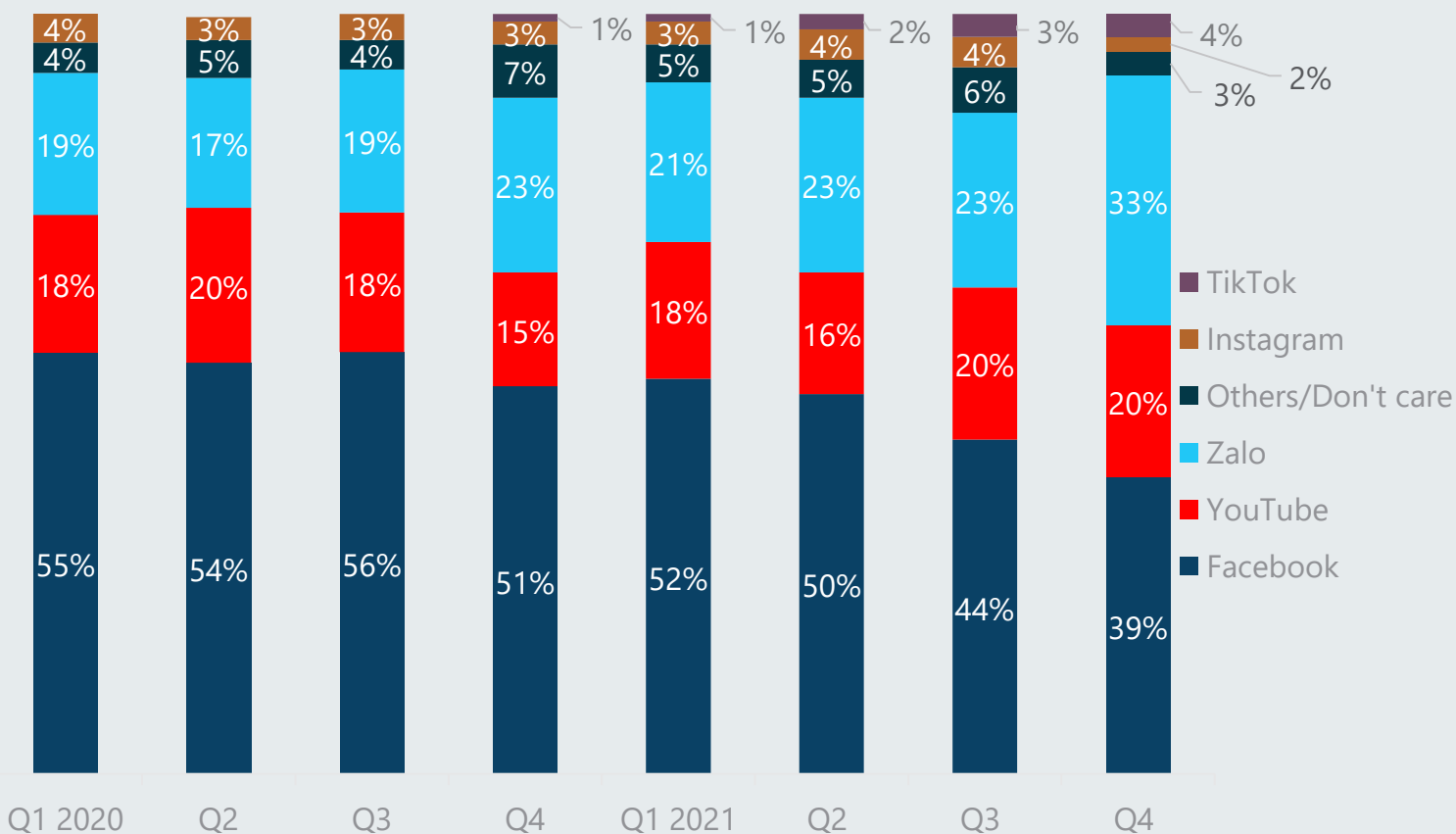
Zalo became Gen X's top platform in Q4 2021, while Tiktok enjoyed healthy growth among the other age groups.



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

2019 Q1 2020 Q2 2020 Q3 2020 Q4 2020
Q1 2021 Q2 2021 Q3 2021 Q4 2021

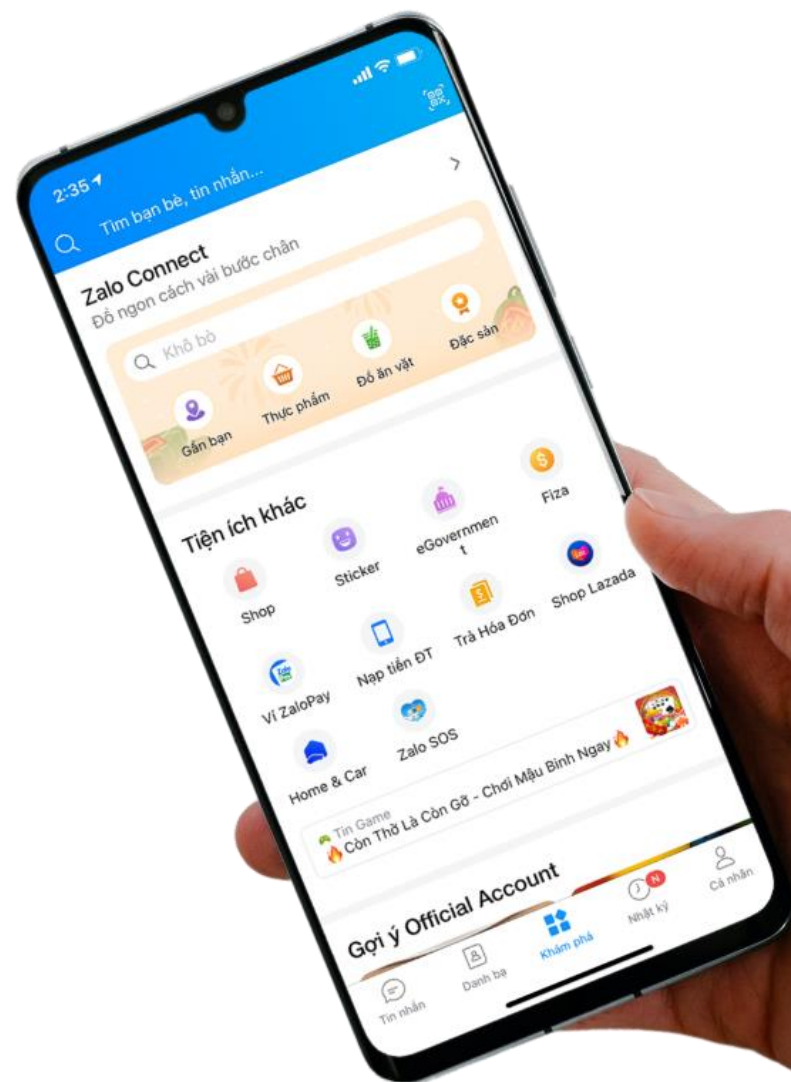
Consumers' primary applications



Zalo grew 10% points in consumers' list of primary apps, siphoning off Facebook's position as Vietnamese consumers' primary application.

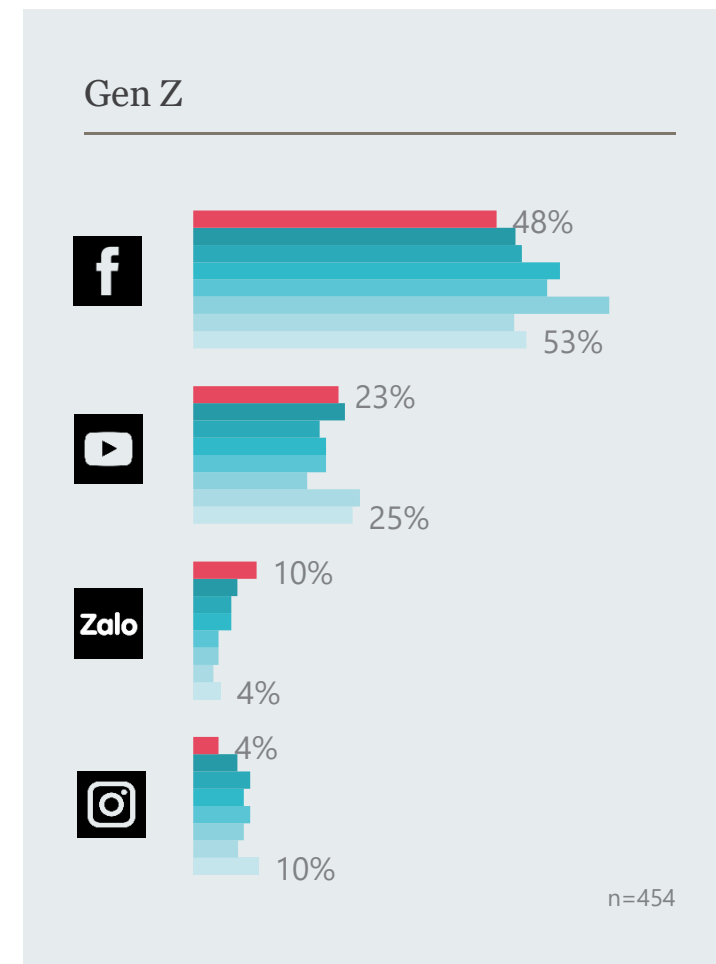
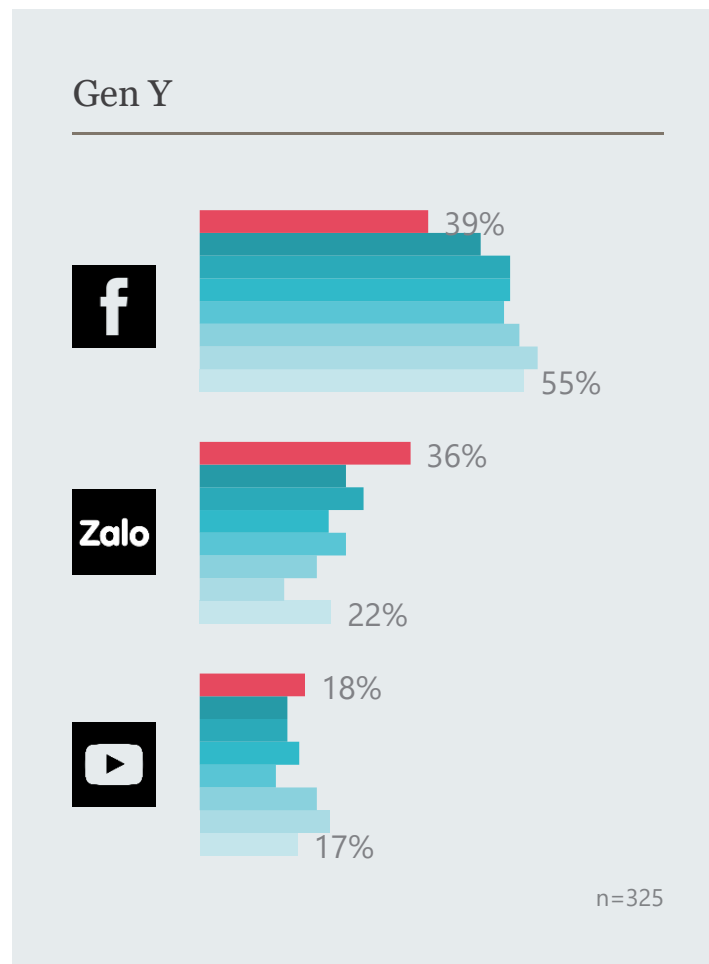
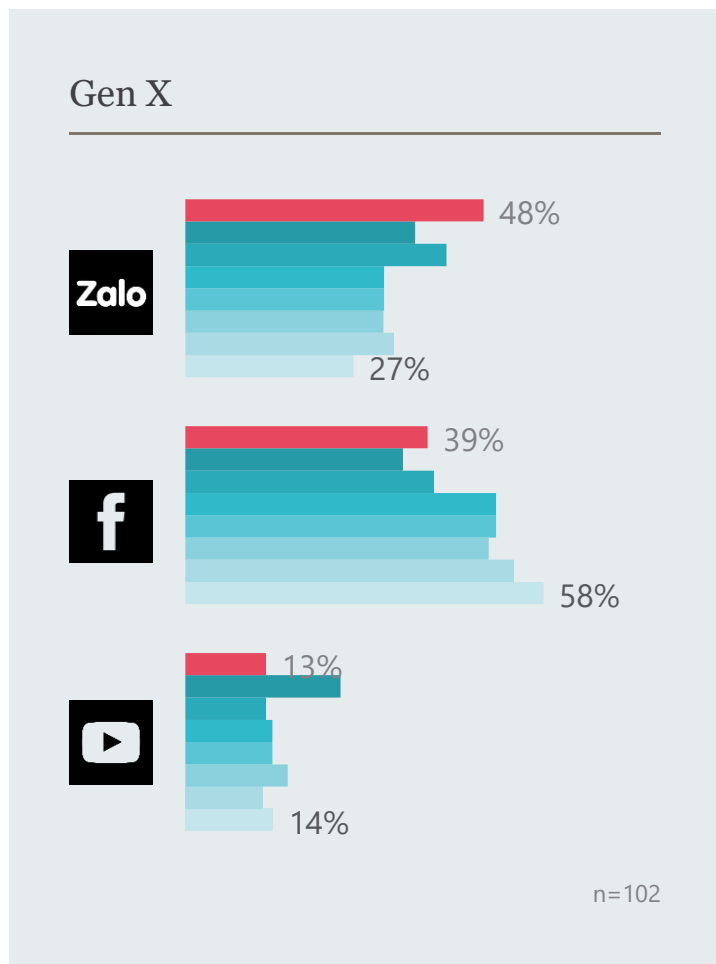
Q: What is your one primary app?

Q4 2021 n=881



In the last quarter of 2021, Zalo sprinted **10% points forward** and became the primary app for **one third** of Vietnam's online population.

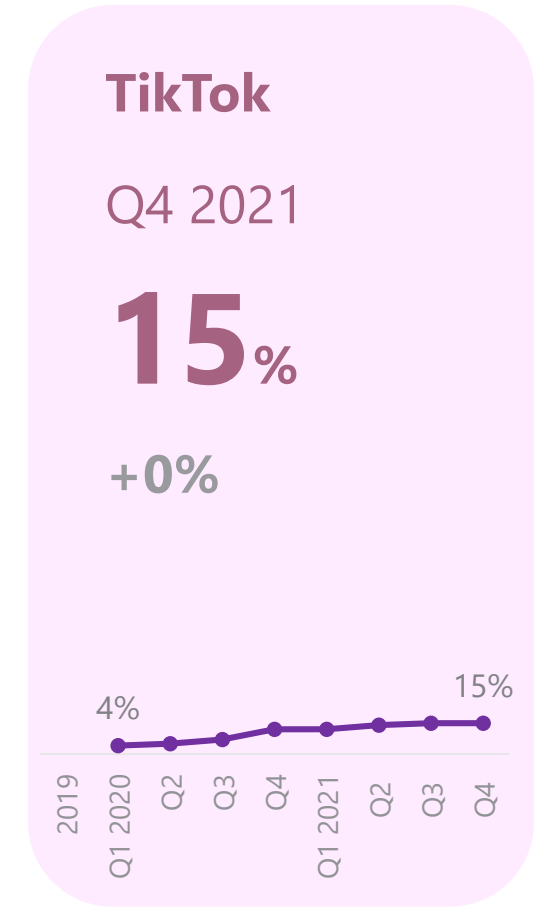
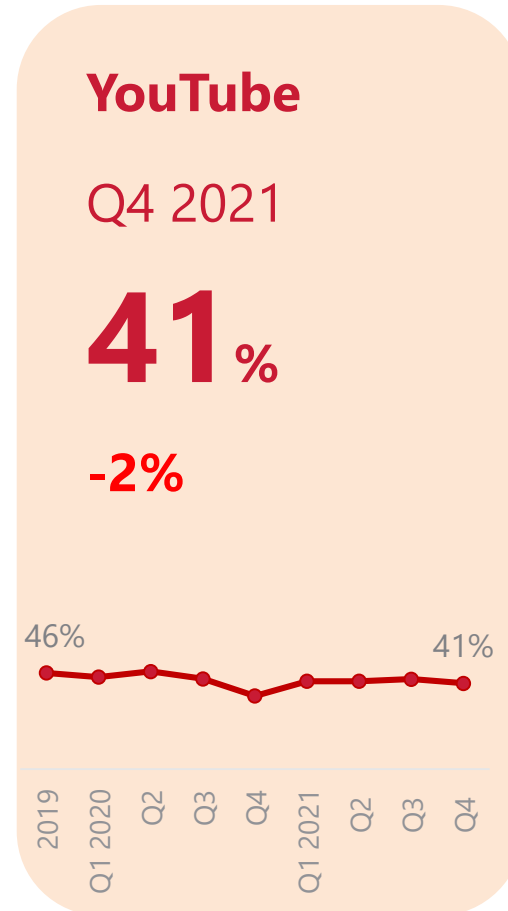
Zalo saw the strongest growth among Gen X & Y consumers. Facebook bounced back for Gen X consumers; yet, this platform still remained on a downward trend for all age groups.



Q: What is your one primary app?

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

Zalo also became more “indispensable” for 6% more consumers in Q4 2021, closely catching up to Facebook.



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

Q4 2021 n=881

Gen X consumers reported using fewer apps in Q4 2021, while the proportion of multiplatform Gen Z consumers increased.



GEN X



MILLENNIAL



GEN Z

Use 3 apps	62% ▲ 8%	37%	25%
Use 4+ apps	38%	63%	75% ▲ 5%

Platforms by popular functions

MUSIC AND ENTERTAINMENT VIDEOS

SHORT VIDEOS

MUSIC/ AUDIO CONTENT

MOVIE STREAMING

YouTube kept its slow-but-steady pace as Vietnamese consumers' go-to platform for entertainment and music videos.

YouTube

Q4 2021

63%

+1%



Facebook

Q4 2021

8%

-3%



TikTok

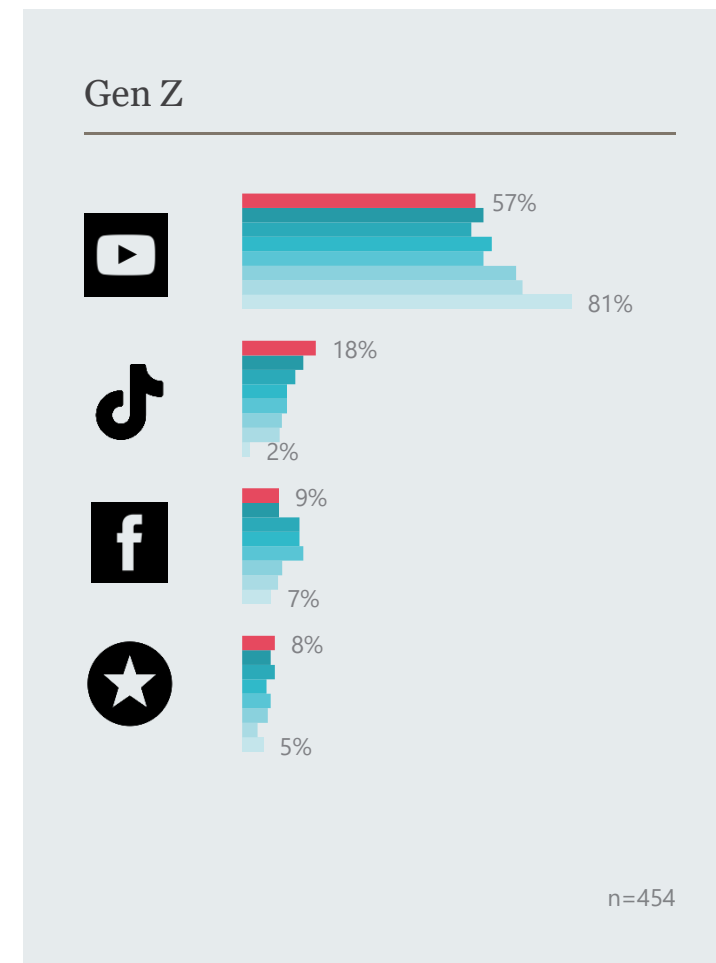
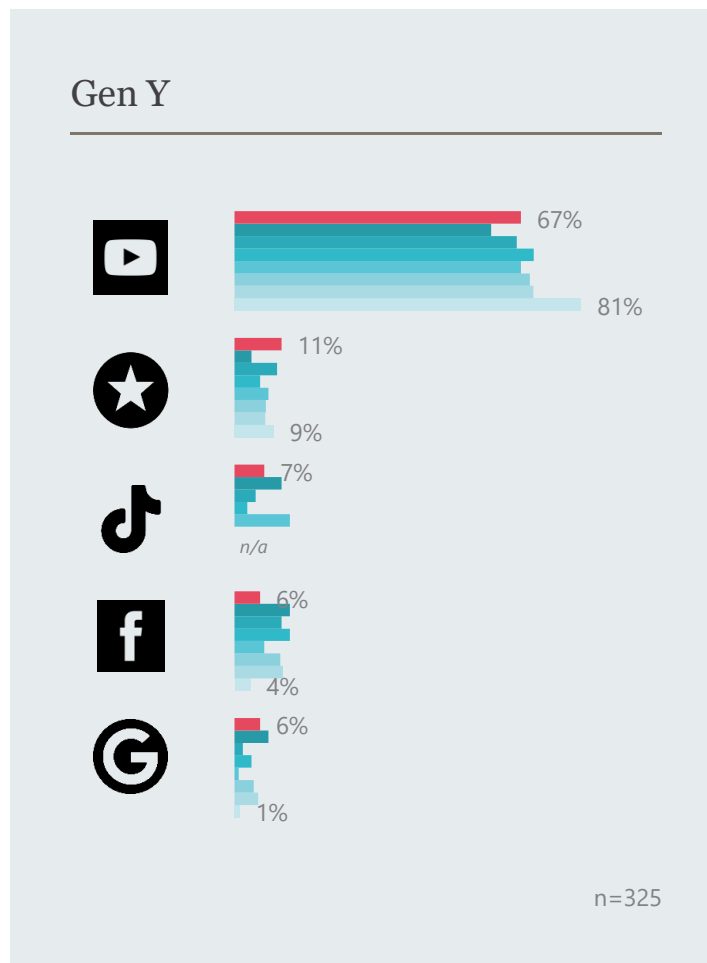
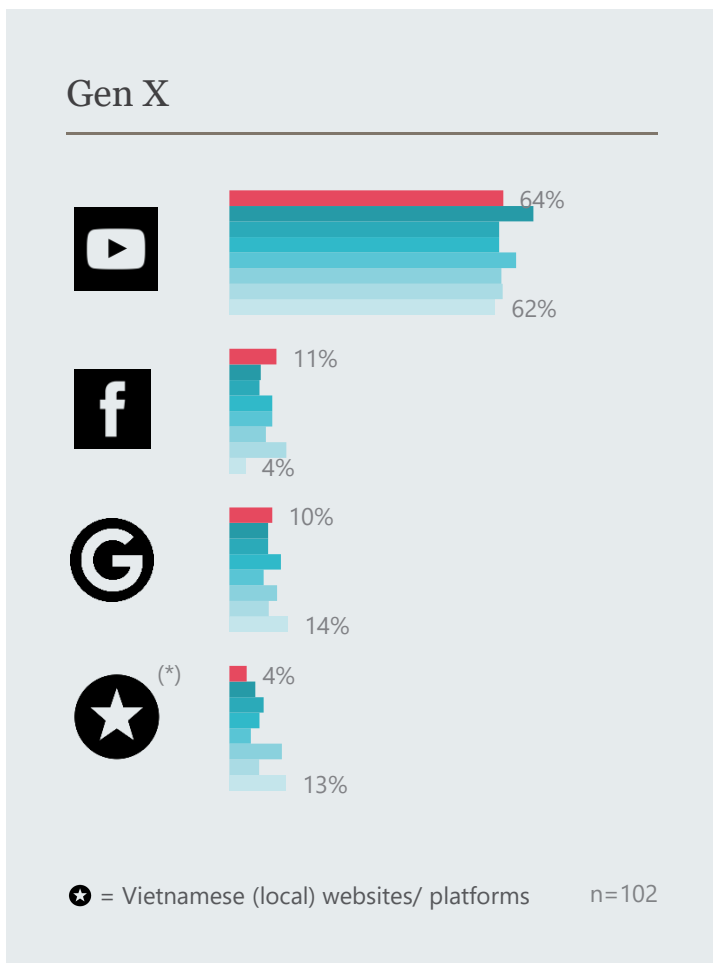
Q4 2021

10%

+0%



YouTube remained popular for all age groups in the entertainment and music video category. That said, more and more Gen Z audience are taking to TikTok instead.



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 Q3 2021 Q4 2021

TikTok had an impressive 6%-jump in popularity and solidified itself as the first destination for short-video content in the last quarter of 2021.

Facebook

Q4 2021

28%

-4%

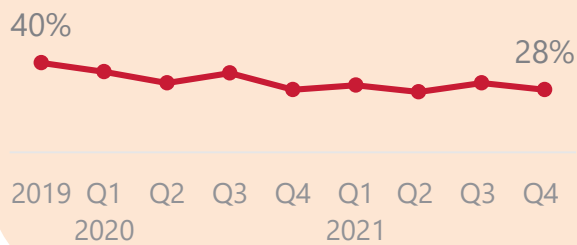


YouTube

Q4 2021

28%

-3%



TikTok

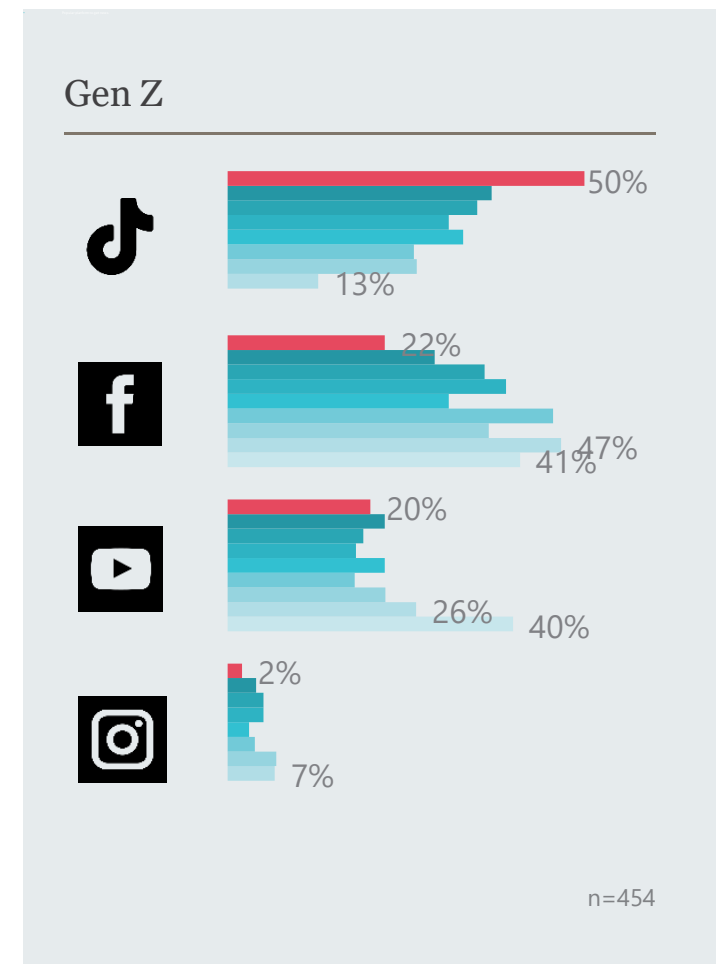
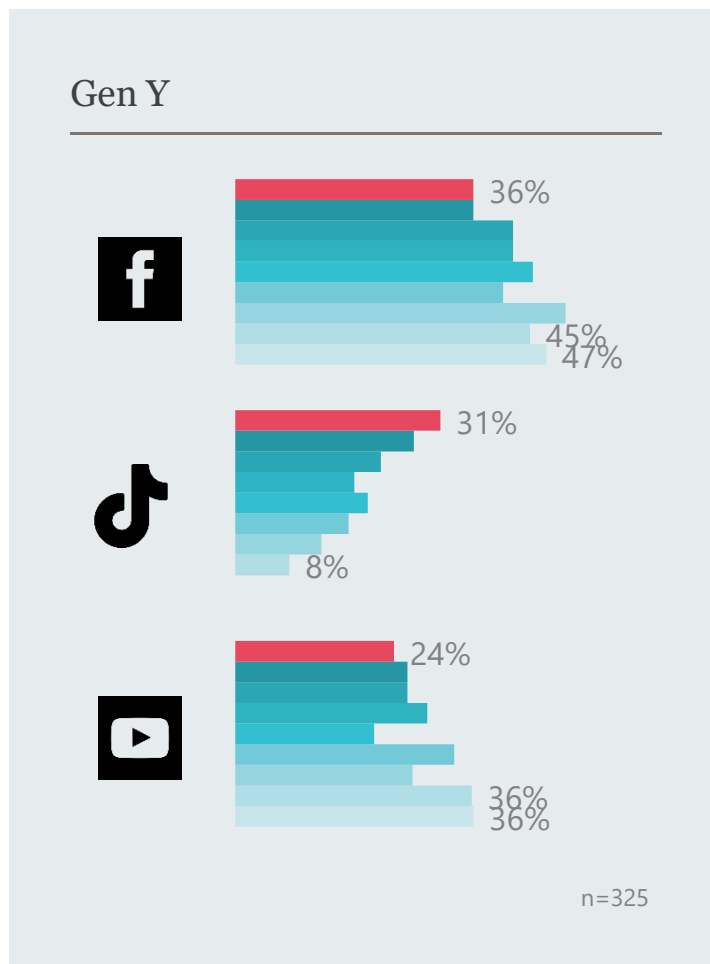
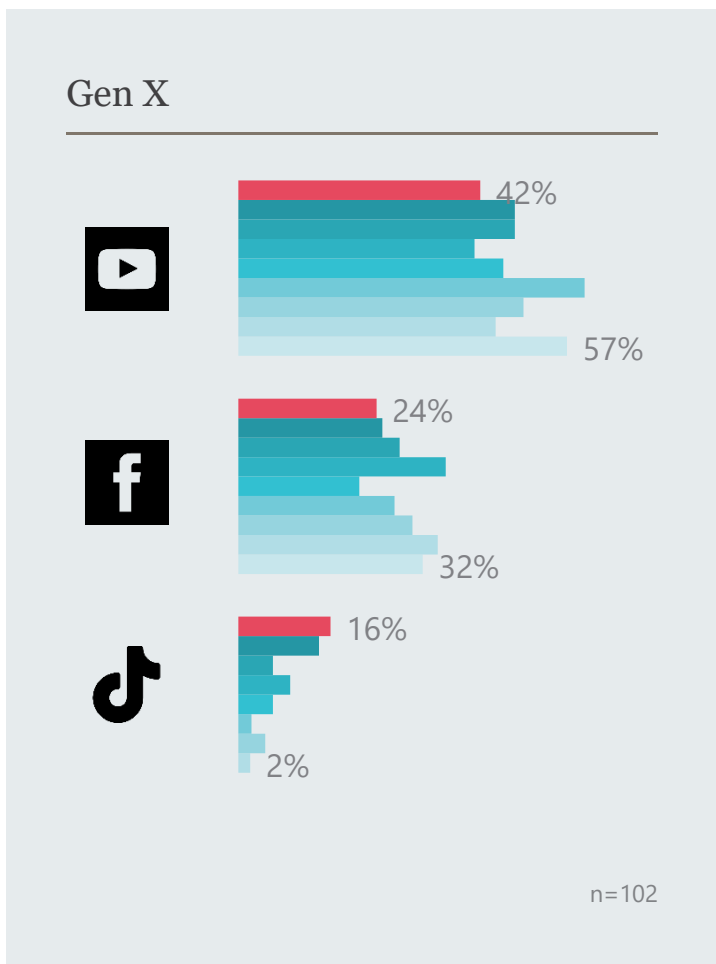
Q4 2021

33%

+6%

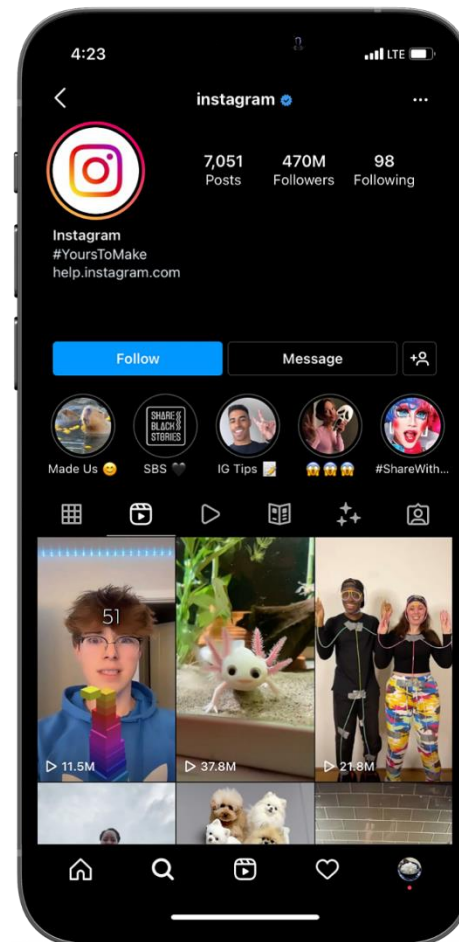
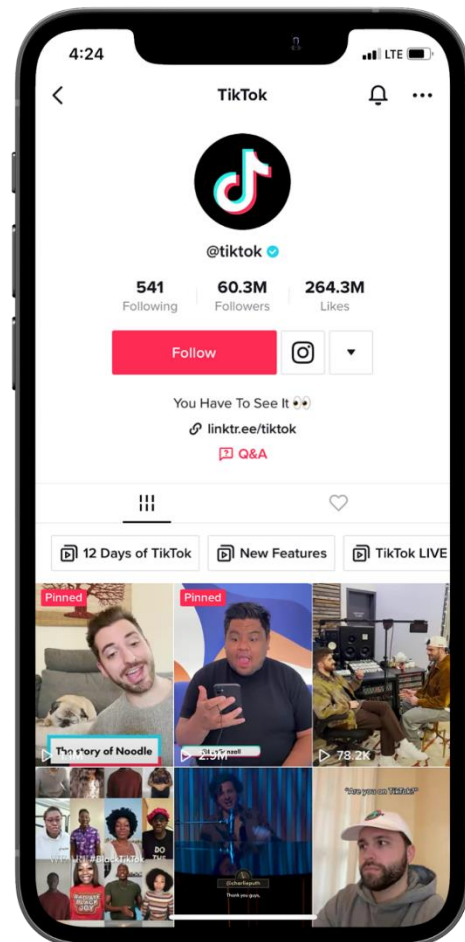


TikTok's rise was driven by an overwhelming increase in popularity among Gen Z users and steady rises in the other age groups.



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

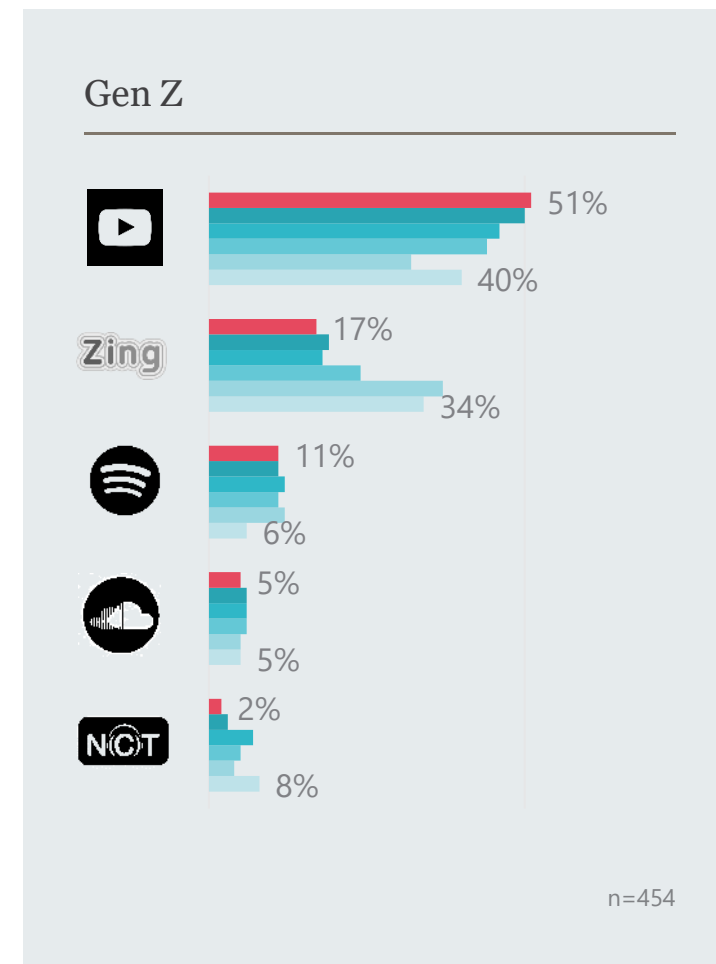
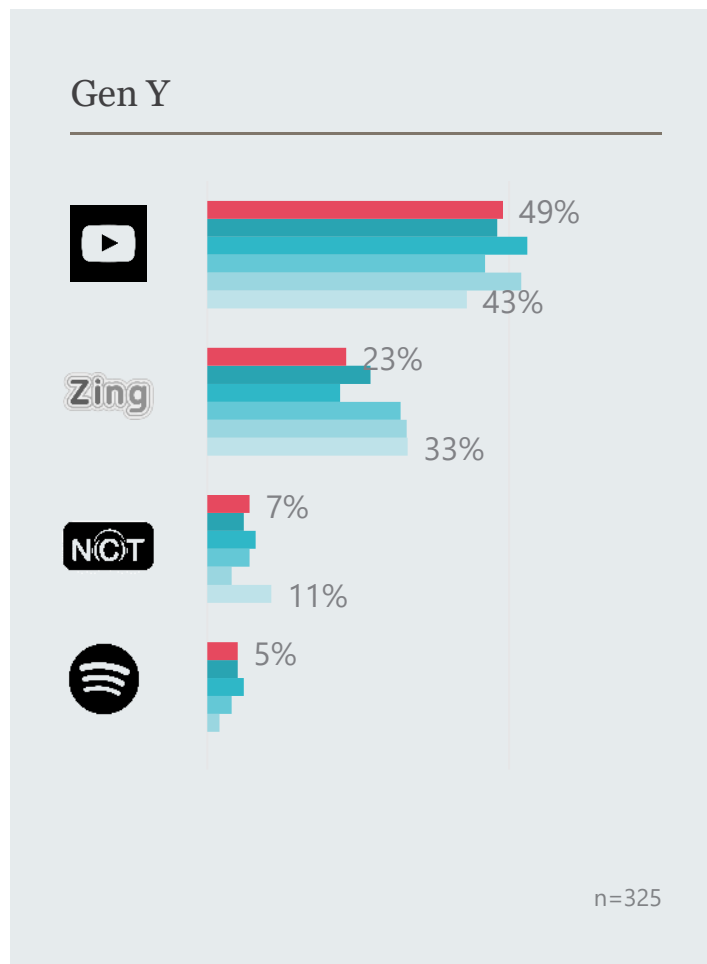
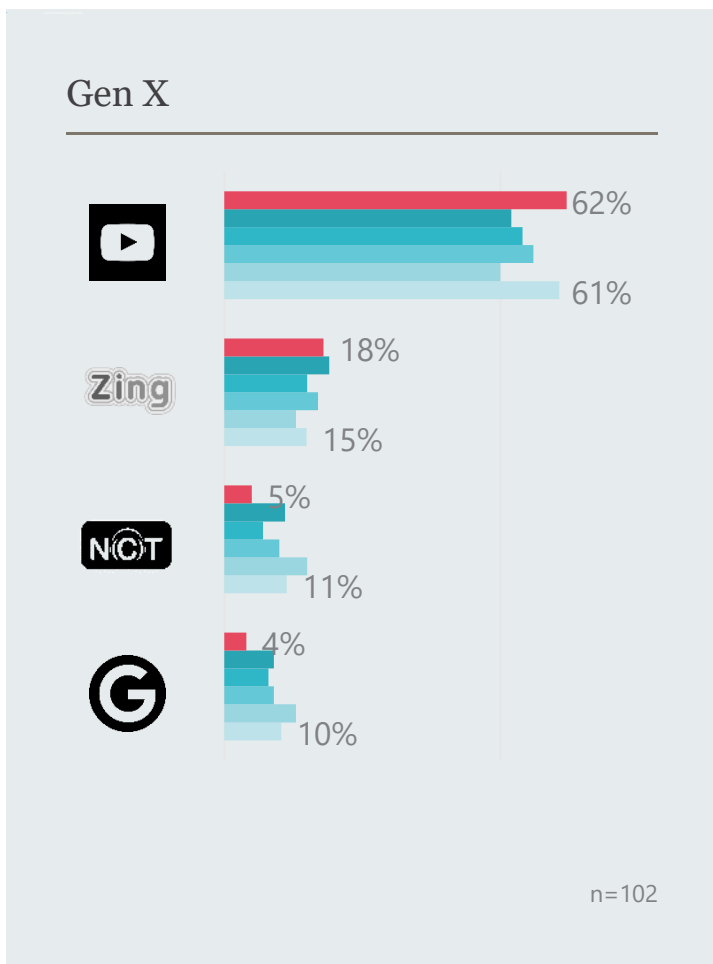
Legend: 2019, Q1 2020, Q2 2020, Q3 2020, Q4 2020, Q1 2021, Q2 2021, Q3 2021, Q4 2021



TikTok has won the short-video game in Vietnam (?)

TikTok's surge in popularity in the last quarter of 2021 makes it the dominant force in the short-video category. Will TikTok stay winning in this space, or will bigger players regain their position in the future?

In the music streaming category, YouTube made a recovery from last quarter's low among Gen X consumers, while enjoying steady growth among other age groups.



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

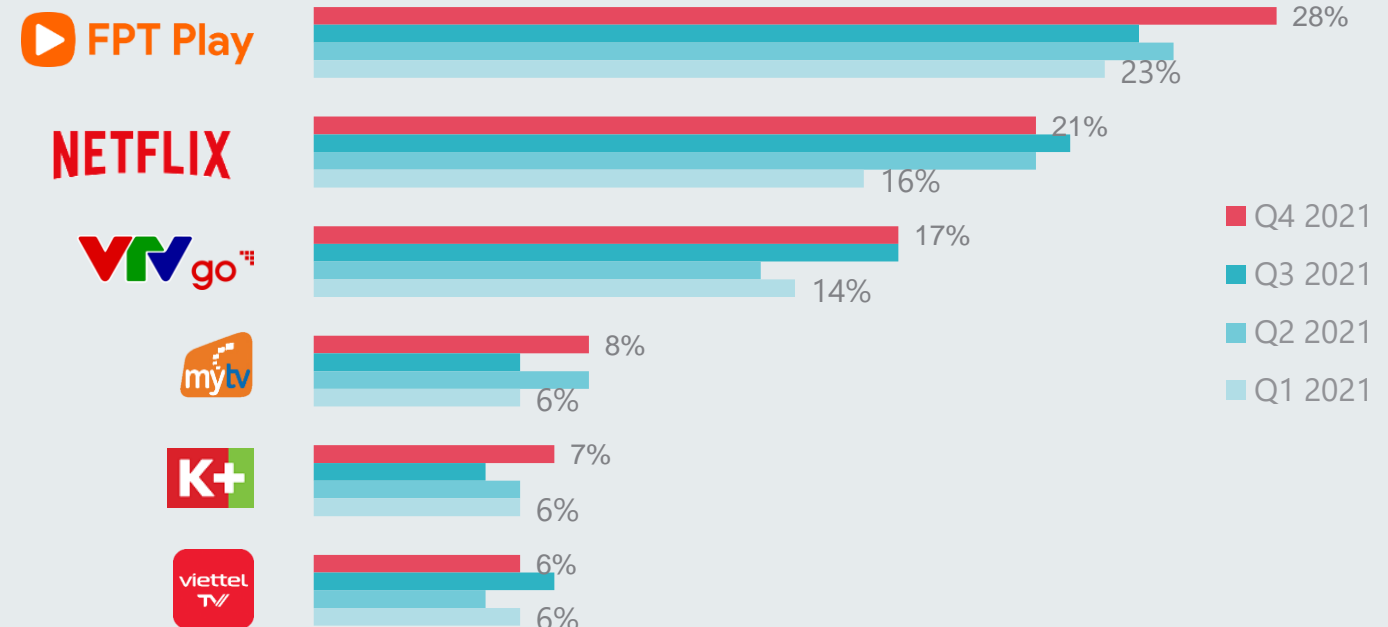
Q3 2020 Q4 2020 Q1 2021 Q2 2021 Q3 2021 Q4 2021

Q4 2021 n=881

FPT Play experienced a 4%-point growth to round out 2021 as the largest streaming platform in Vietnam.

FPT Play, MyTV, and K+ all enjoyed growth in penetration rates in Q4 2021.

Top paid streaming services in Vietnam by market penetration rates



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

Q4 2021 n=881

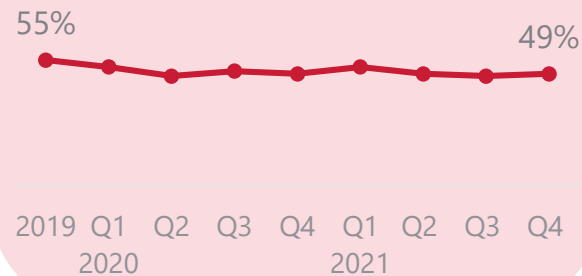
After last quarter's surge in popularity, local platforms collectively lost 5% points as consumers' preferred streaming platforms.

YouTube

Q4 2021

49%

+1%



Local platforms

Q4 2021

21%

-5%

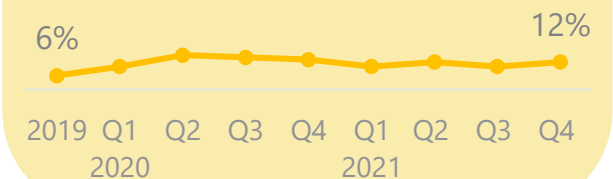


Google Search

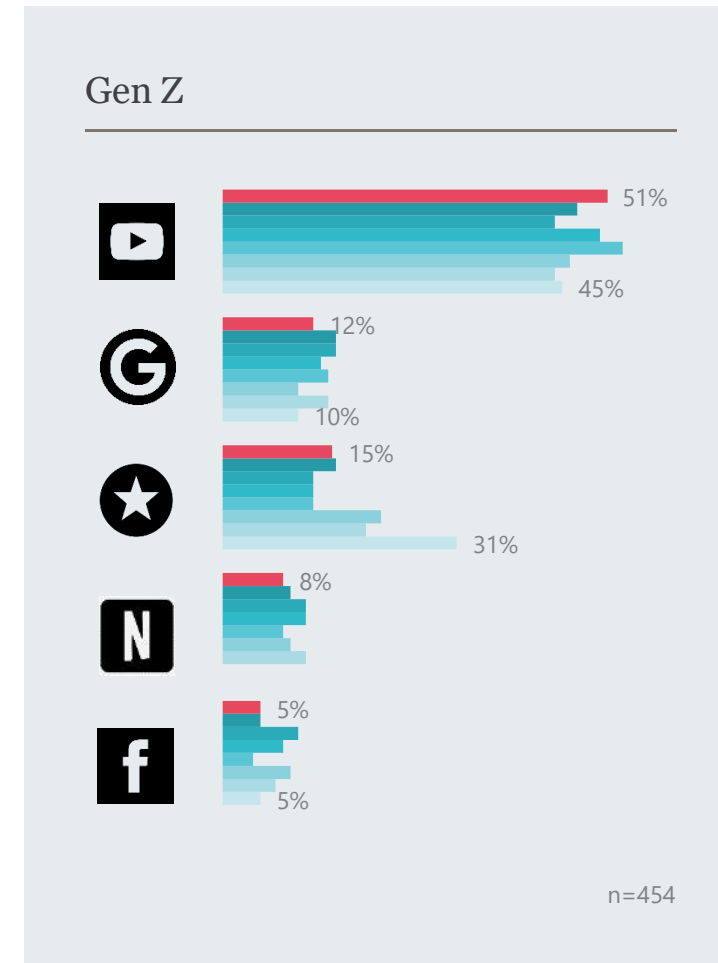
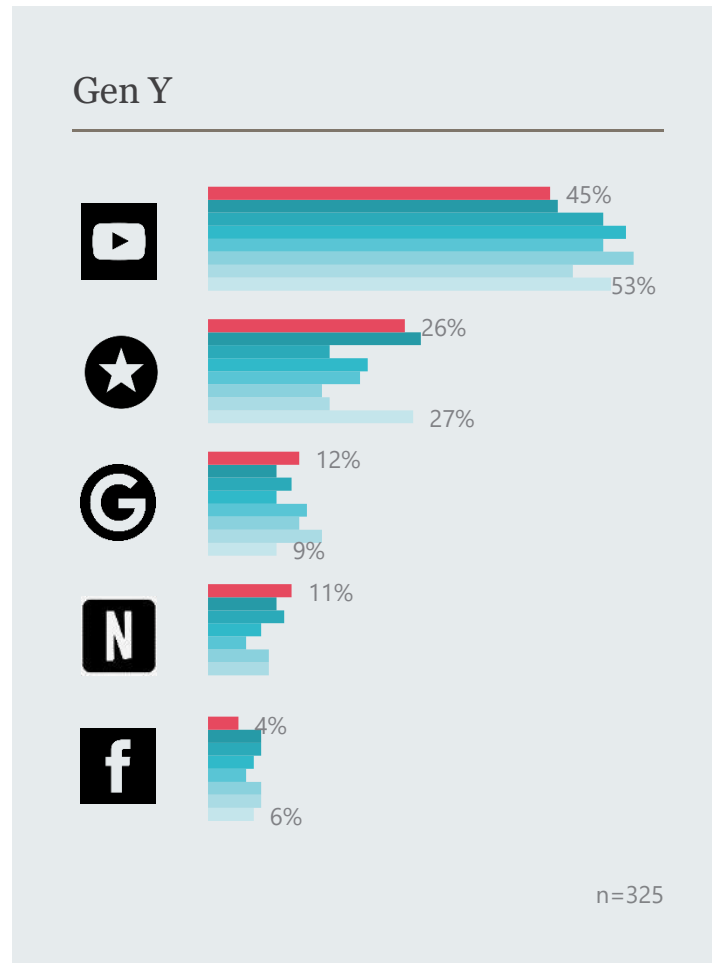
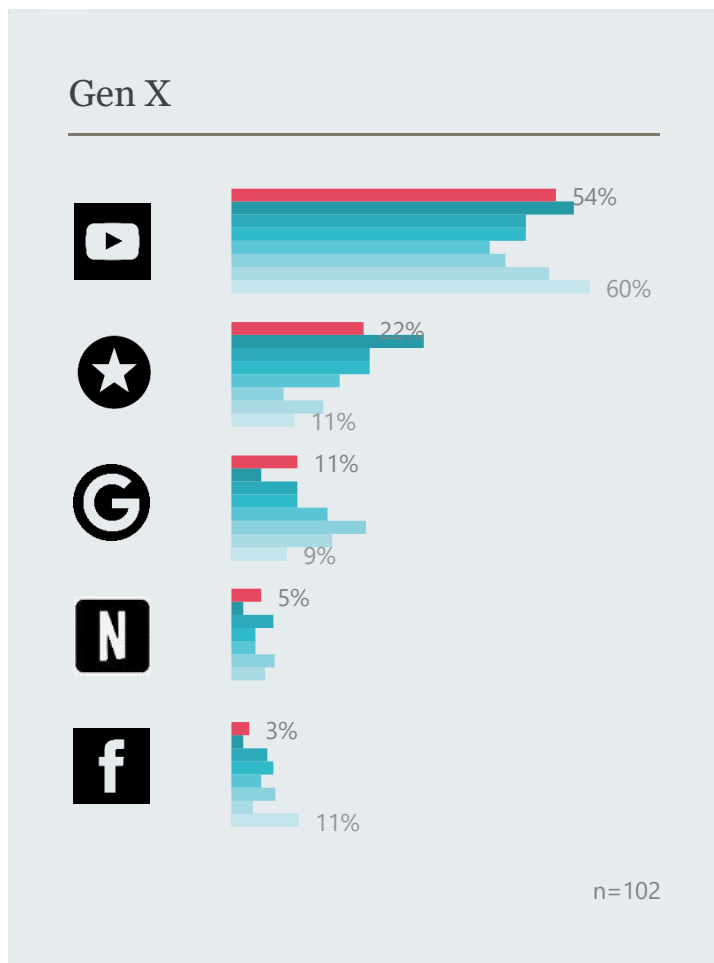
Q4 2021

12%

+2%



Gen X & Y consumers' attention appears to have shifted to Netflix and Google Search at local platforms' expense.



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
 ■ Q3 2021
 ■ Q4 2021



Platforms by other functions

NEWS

COMMUNICATION AND MESSAGING

CASUAL BROWSING

BROWSER

E-COMMERCE PLATFORMS

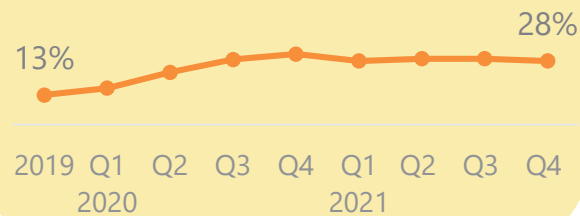
Consumers found revived interest in Facebook as a news source, after a year of shying away from this platform. Local news websites also experienced slight increases in popularity.

Google Search

Q4 2021

28%

-1%



Facebook

Q4 2021

26%

+3%

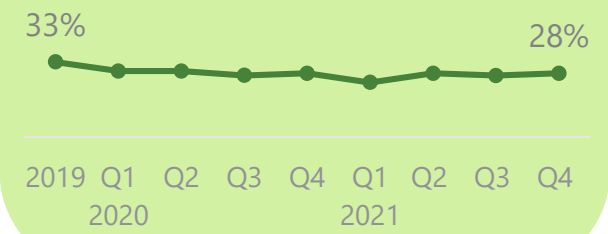


Local publishers

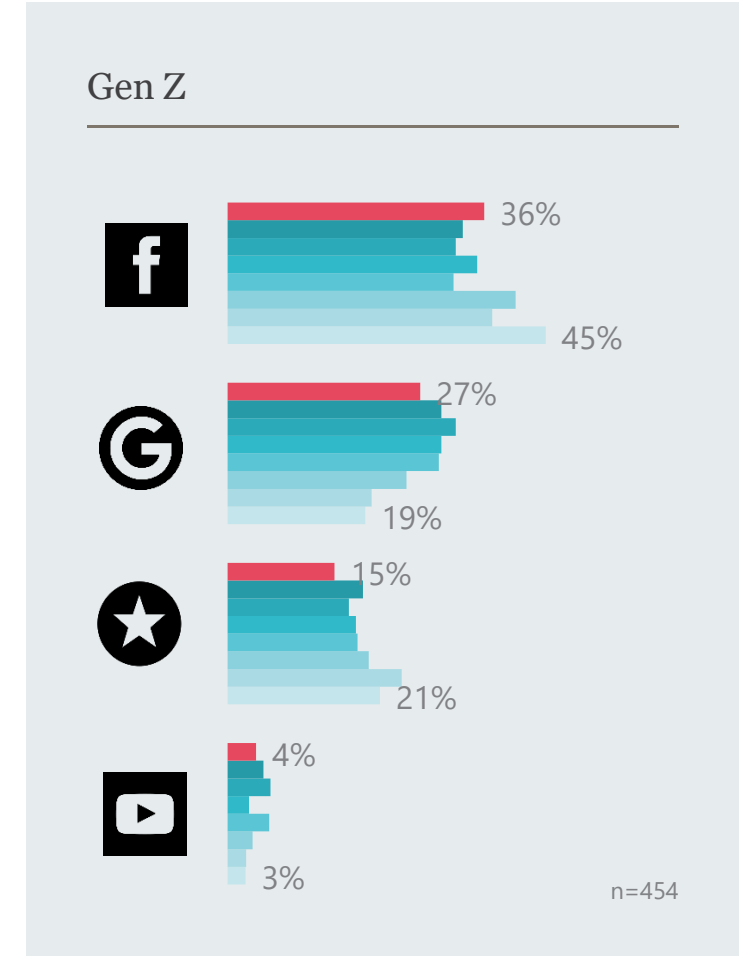
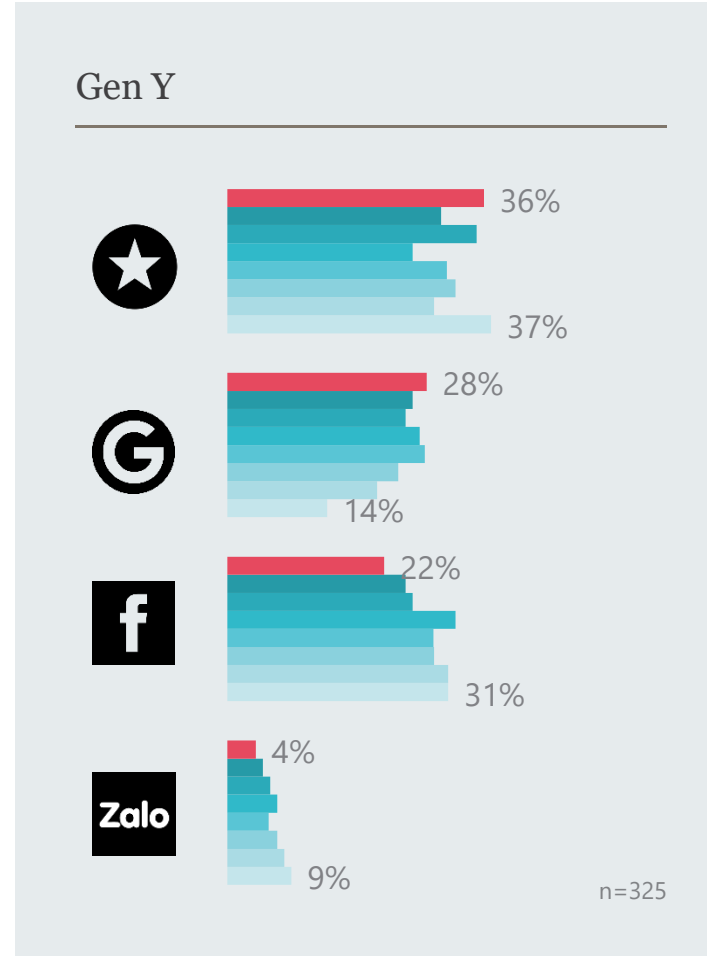
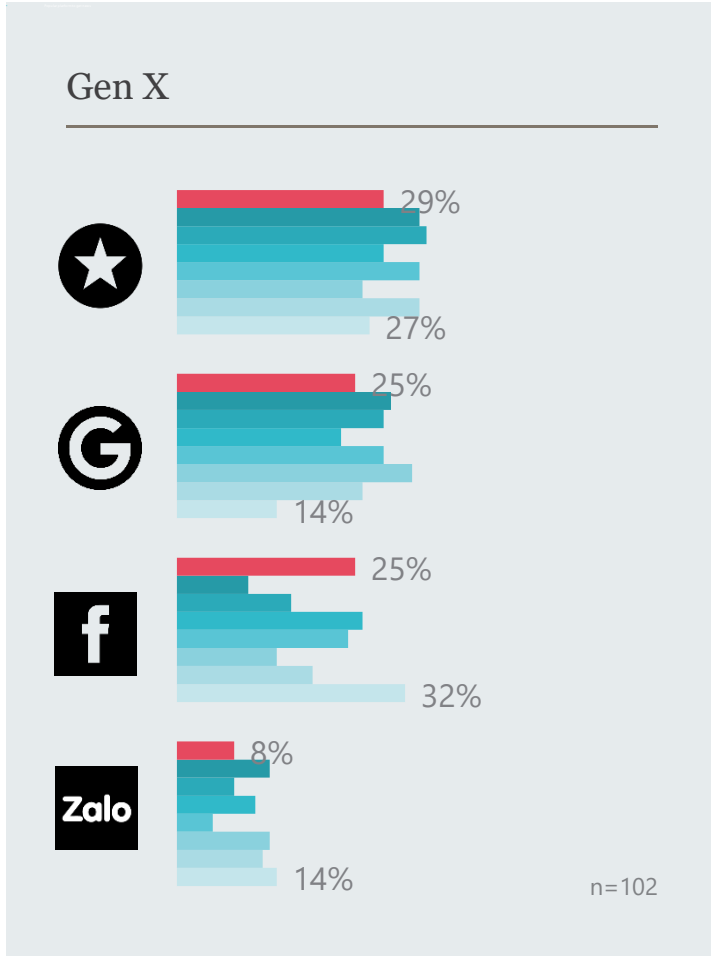
Q4 2021

28%

+1%



The revival of interest in Facebook as a news source can be best observed among Gen X & Z consumers. Gen Y consumers tend to utilize search engine Google and local news publishers for their news.



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

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

Q4 2021 n=881

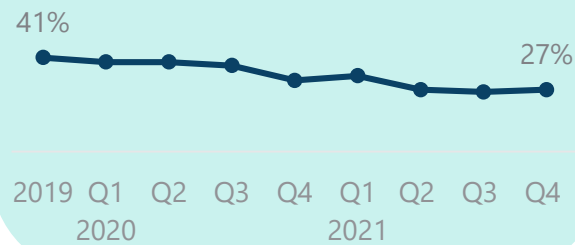
Vietnamese became increasingly attached to Zalo as the go-to destination for connecting with close ones.

Facebook

Q4 2021

27%

+1%

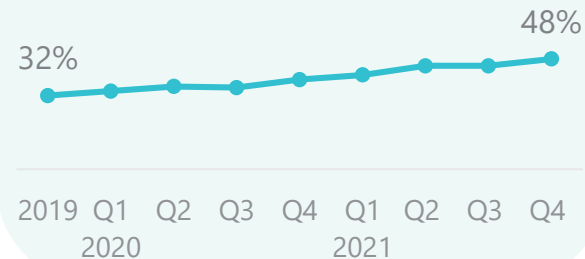


Zalo

Q4 2021

48%

+3%



Messenger

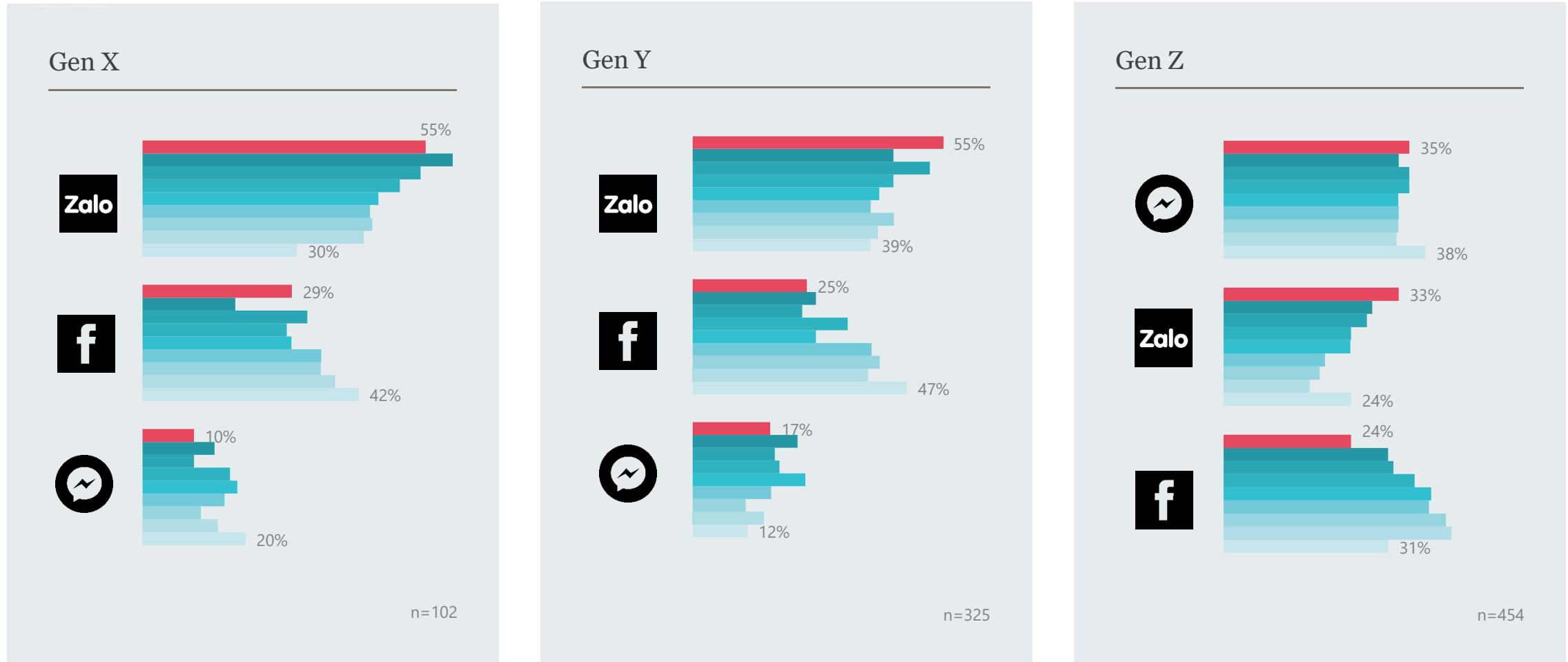
Q4 2021

20%

-4%



Zalo overtook Facebook as the second-most preferred means of communicating with close ones, right after Messenger, for Gen Z users.



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

■ 2019 ■ Q1 2020 ■ Q2 2020 ■ Q3 2020 ■ Q4 2020
■ Q1 2021 ■ Q2 2021 ■ Q3 2021 ■ Q4 2021

Q4 2021 n=881

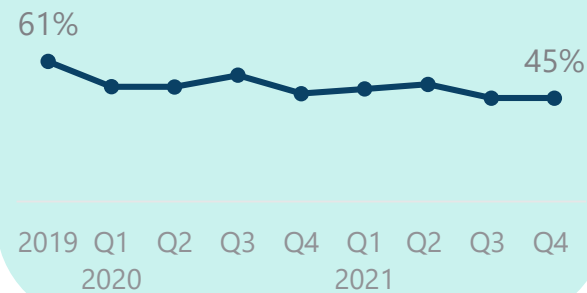
Facebook was the top destination for casual scrolling in Q4 2021.

Facebook

Q4 2021

45%

+0%



YouTube

Q4 2021

14%

+0%

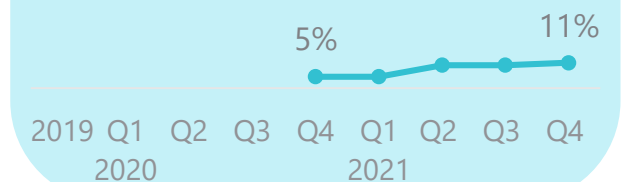


TikTok

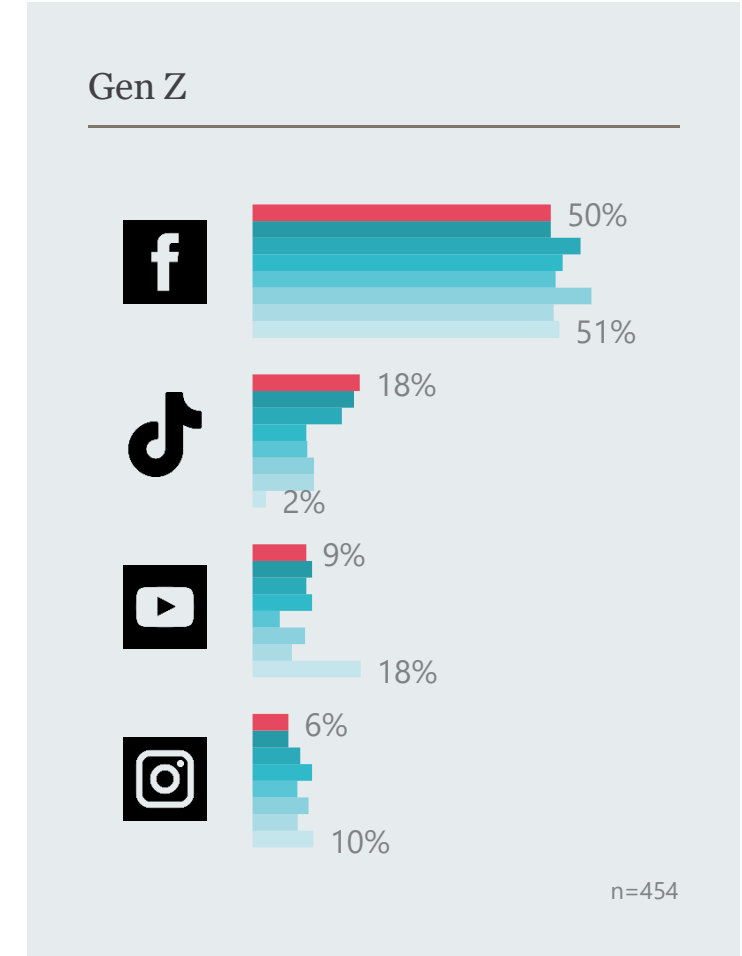
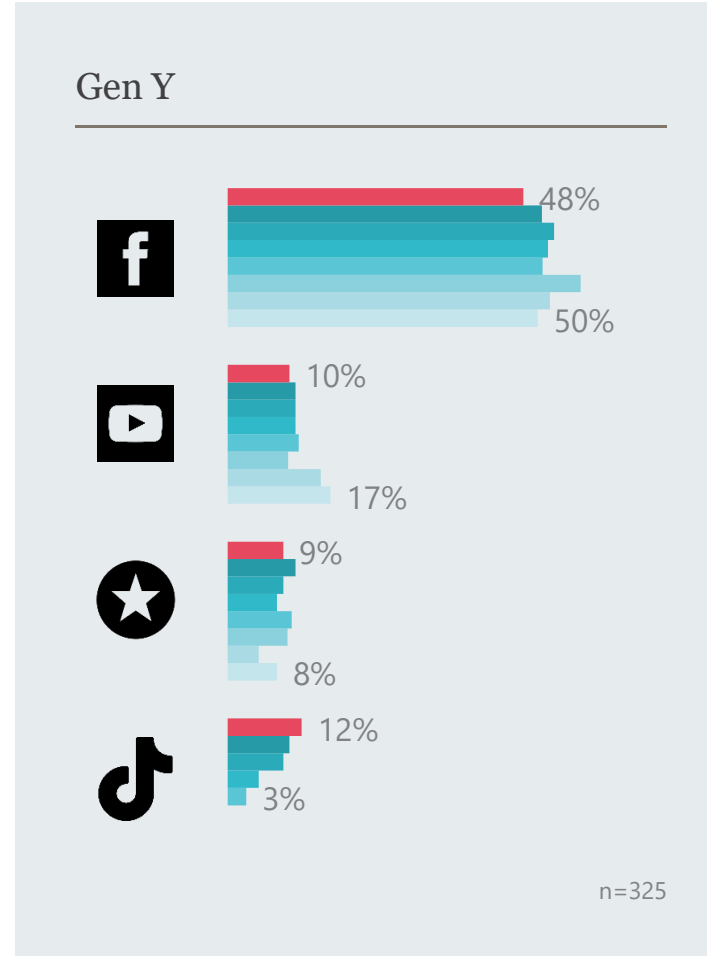
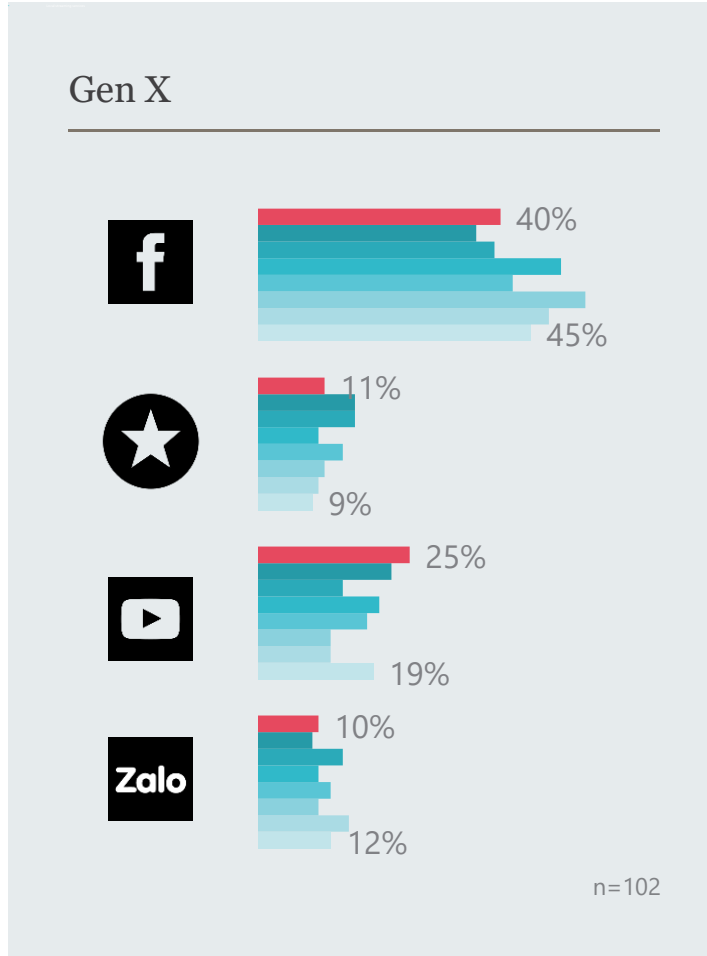
Q4 2021

11%

+1%



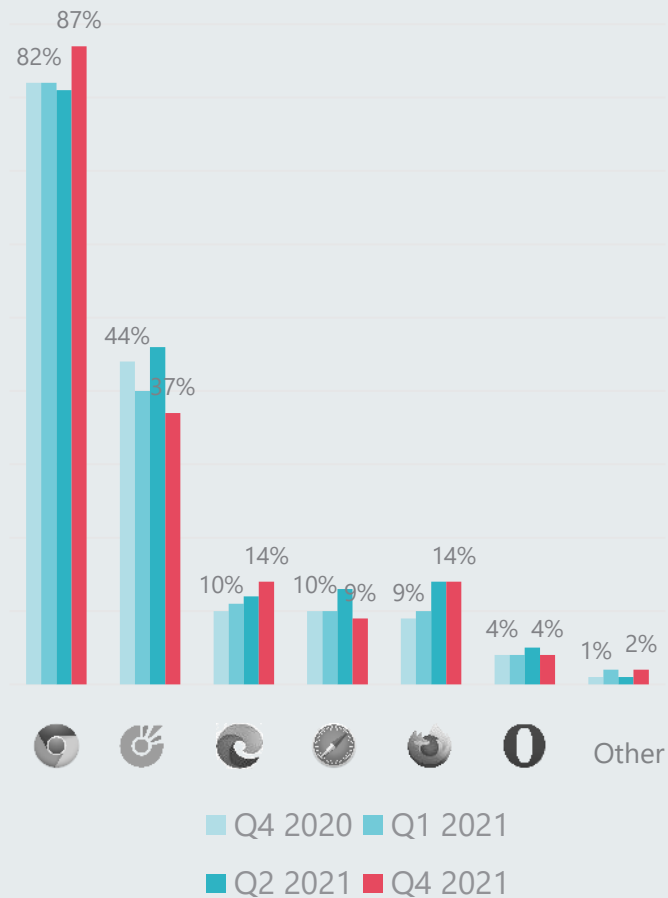
YouTube grew among Gen X, while TikTok grew among Gen Y & Z as top platforms for mindless scrolling.



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

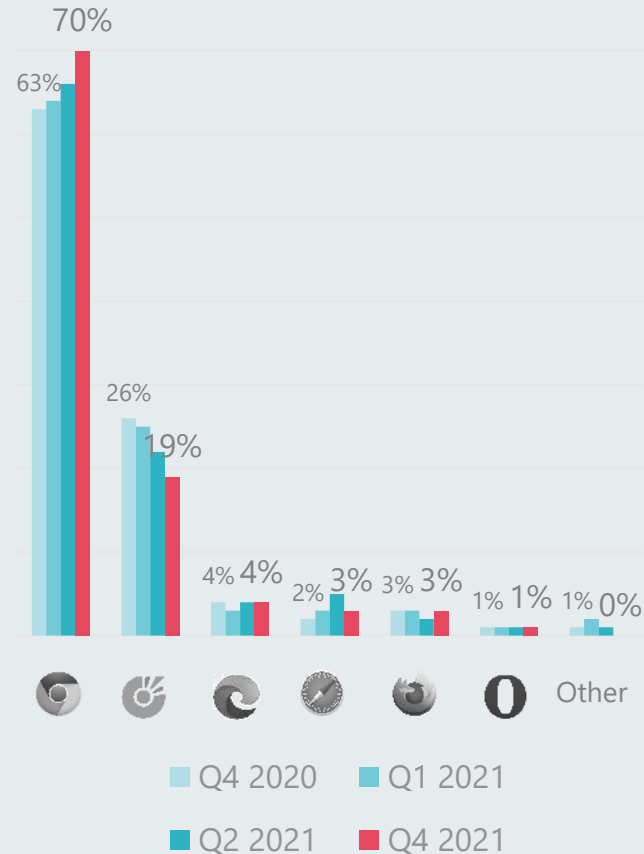
■ Q1 2020
 ■ Q2 2020
 ■ Q3 2020
 ■ Q4 2020
 ■ Q1 2021
 ■ Q2 2021
 ■ Q3 2021
 ■ Q4 2021

Browser penetration rates - PC



Q: Which of the following browser do you use to browse the Internet on PC?

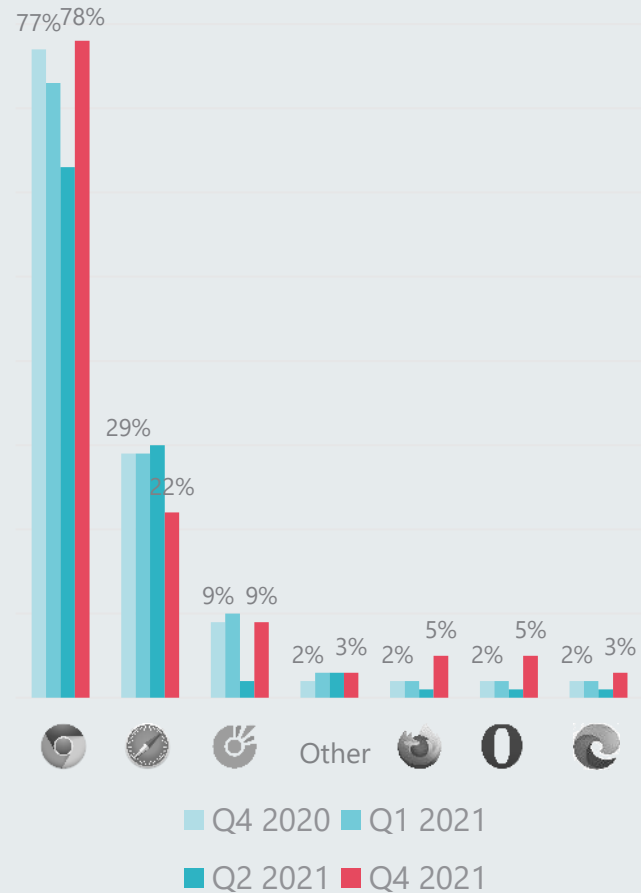
Most often used browser - PC



Q: Which of the following browser do you use most often to browse the Internet on PC?

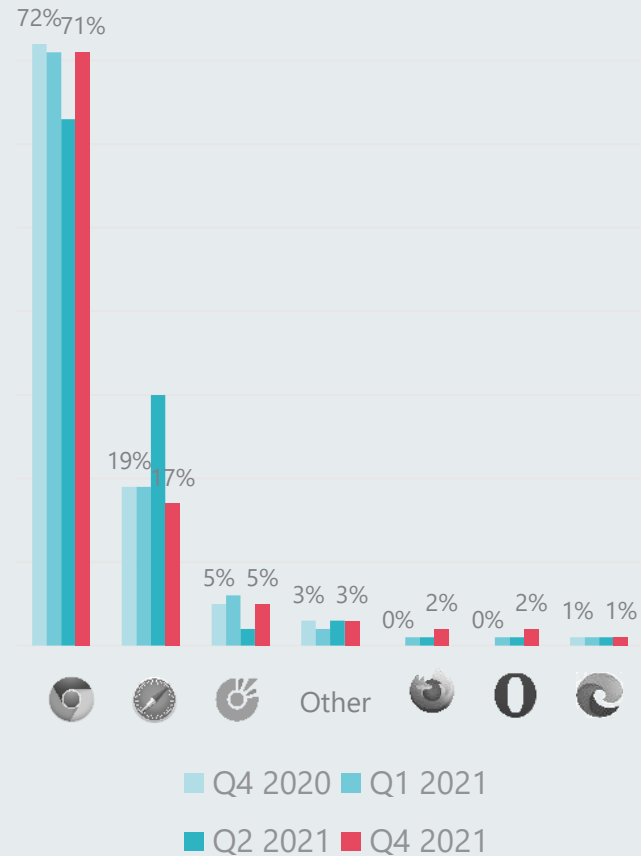
Google Chrome remains the most popular and used browser on PC device, followed by Vietnam's own Coc Coc.

Browser penetration rates - Mobile



Q: Which of the following browser do you use to browse the Internet on mobile?

Most often used browser - Mobile



Q: Which of the following browser do you use most often to browse the Internet on mobile?

Similarly on Mobile devices, Google Chrome is Vietnamese users' go-to browser.

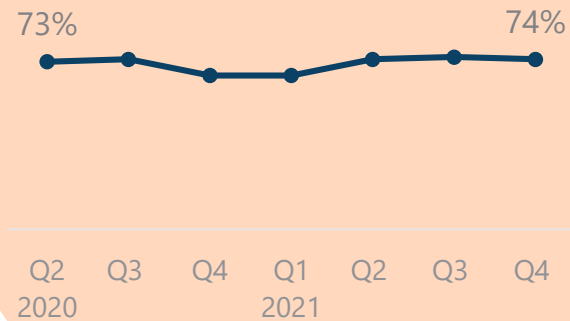
Generally, there was no significant movements among top E-commerce platforms in the last quarter of 2021.

Shopee

Q4 2021

74%

-1%



Lazada

Q4 2021

51%

-2%



Tiki

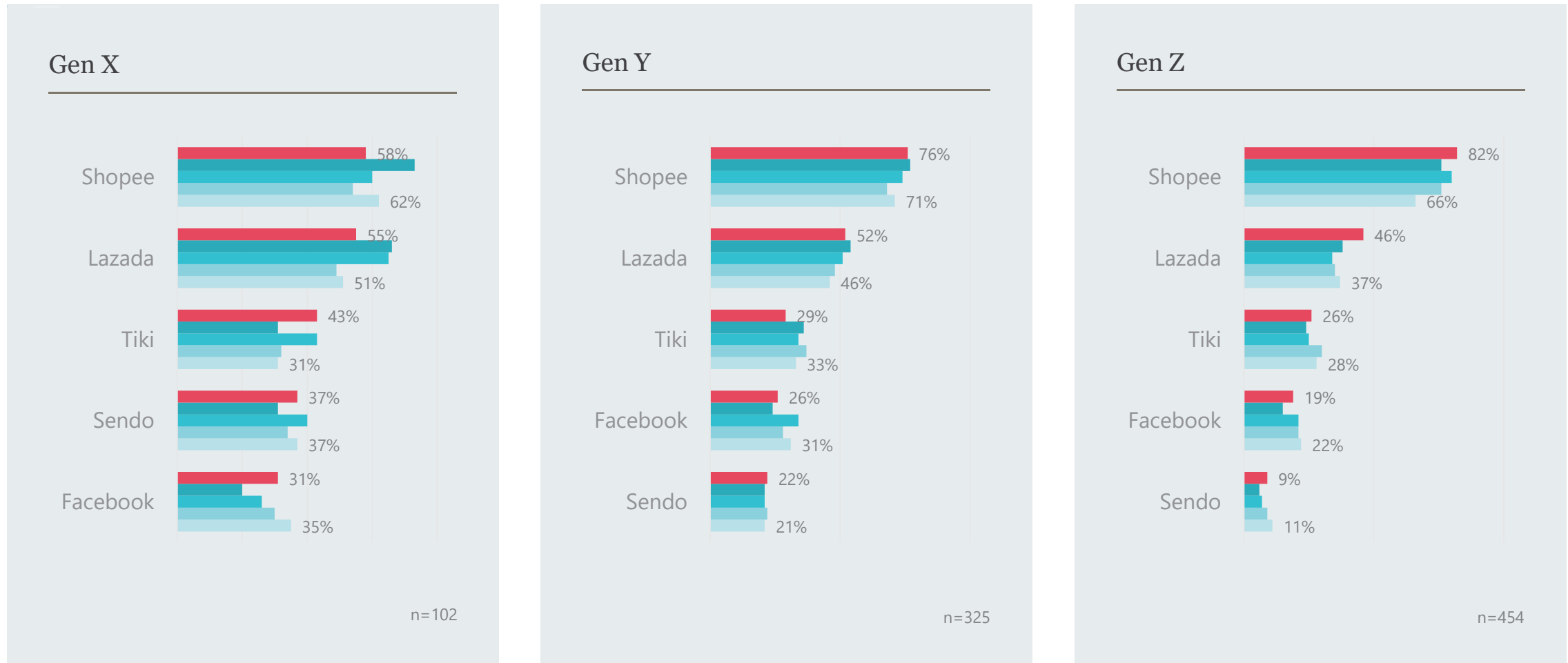
Q4 2021

32%

+1%



Top platforms Shopee & Lazada dipped in popularity among Gen X. Facebook commerce grew more popular across generations.

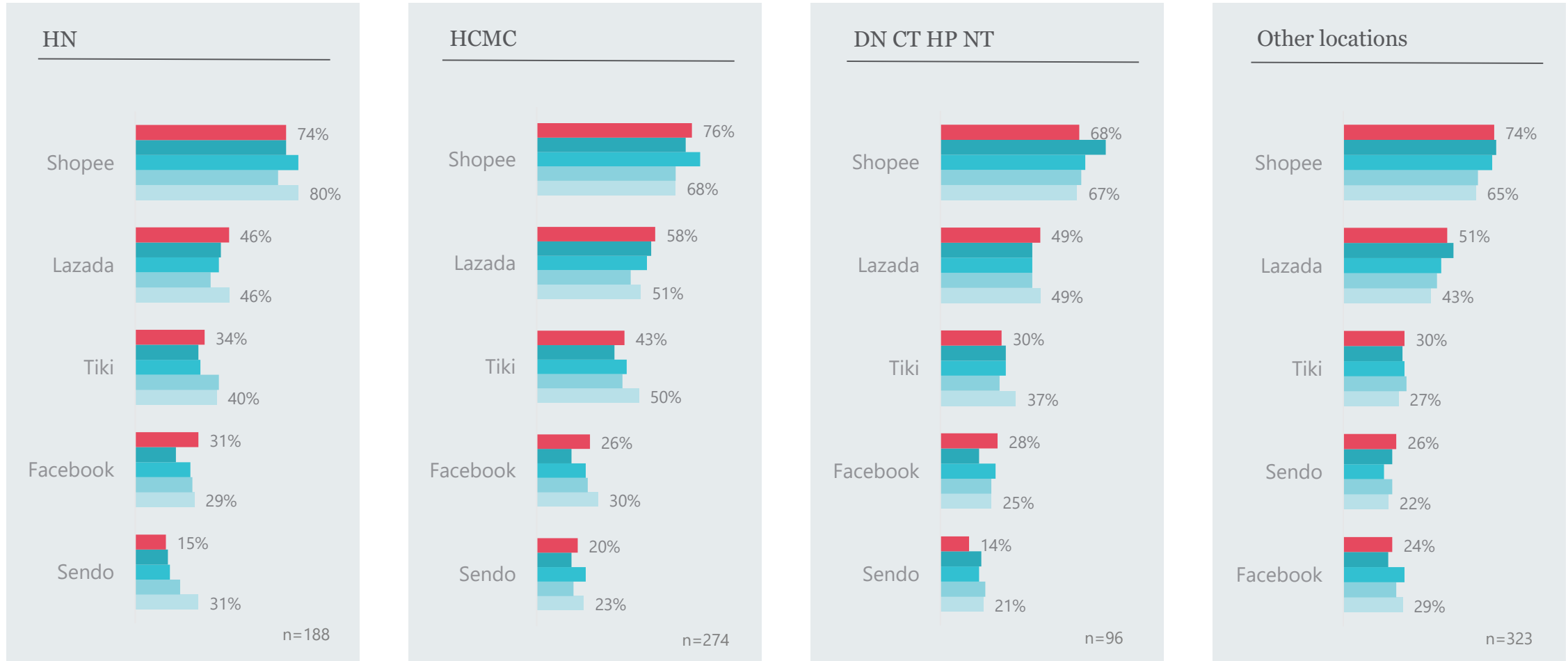


Q: Which of the following platforms/apps do you use for online shopping? Choose all that apply.

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

Q4 2021 n=881

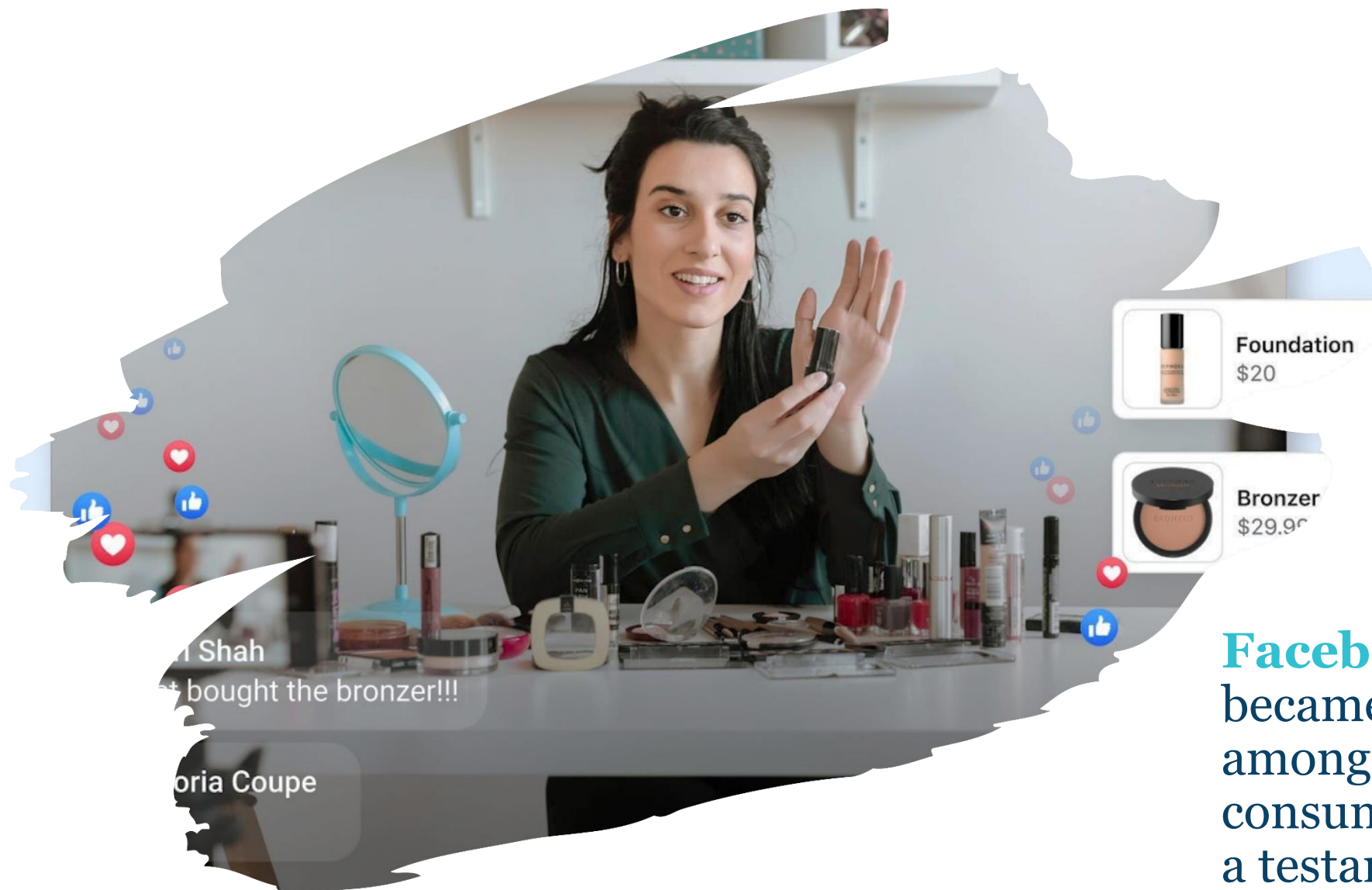
Facebook commerce also gained popularity across locations. Additionally, consumers in HN & HCMC took to e-commerce platforms more, compared to those in other areas.



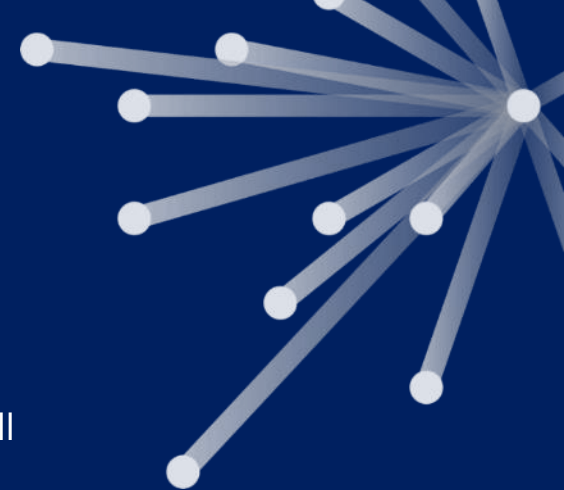
Q: Which of the following platforms/apps do you use for online shopping? Choose all that apply.

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

Q4 2021 n=881



Facebook Commerce became more popular among Vietnamese consumers generally. This is a testament to Facebook's push for commerce on its platform.



KEY FINDINGS

- **Zalo** was the breakout star of Q4 2021. Zalo jumped 10% points as a **primary app** for Vietnamese users of all ages and became the most popular apps among **Gen X** consumers. Zalo also became Vietnam's **defacto messaging app**, beating the likes of Facebook and its platform Messenger. Zalo has proven itself an **indispensable** platform, especially among consumers in older age groups.
- **TikTok** was the overall winner of 2021, showing consistent growth throughout the year in various categories. By the end of Q4 2021, TikTok has become the dominant **short-video platform** for Vietnamese. If marketers and advertisers in Vietnam haven't been paying attention to TikTok, they should now!
- **FPT Play** is currently the market leader among streaming platforms (besides YouTube). The local streaming platform is a viable over-the-top channel for advertisers in Vietnam.
- **Facebook commerce** has become an increasingly important **e-commerce channel** for consumers of all ages across Vietnam. That said, Facebook has been facing declines in popularity in other categories. Most importantly, Facebook's long-standing position as Vietnamese consumers' primary app is on shaking grounds, **facing sharp competition** from Zalo and the up-and-coming TikTok.

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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