



The Connected Consumer Q4 2022



PREPARED BY DECISION LAB

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Introduction



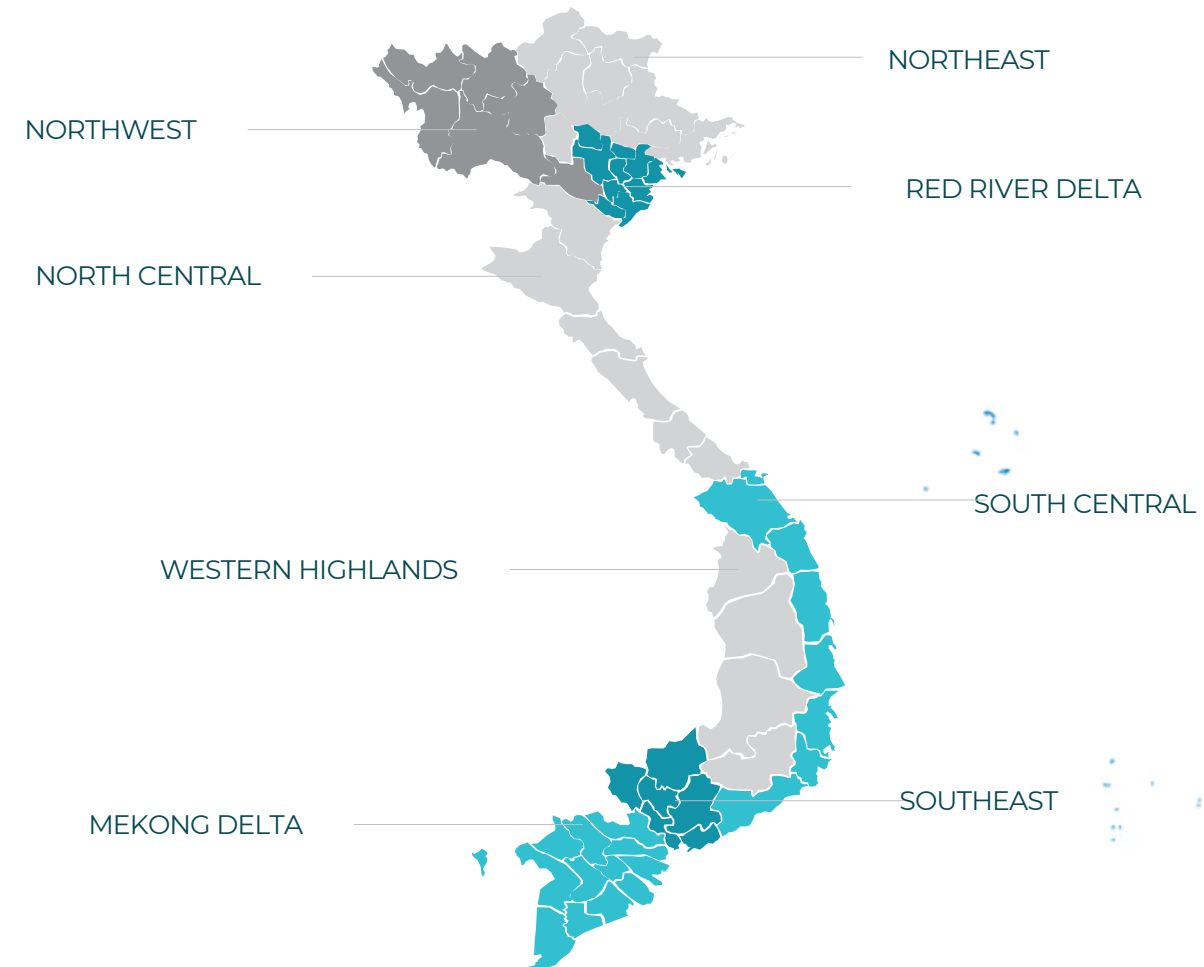
Background

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.

Achieved sample

QUARTER	SAMPLE COLLECTION PERIOD	TOTAL SAMPLE SIZE
Q4 2022	Oct 2022 – Dec 2022	1584
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 (MILLENNIALS)

BORN BETWEEN 1981 – 1996

AGE 26 – 41



GEN X

BORN BETWEEN 1960 – 1980

AGE 42 – 62

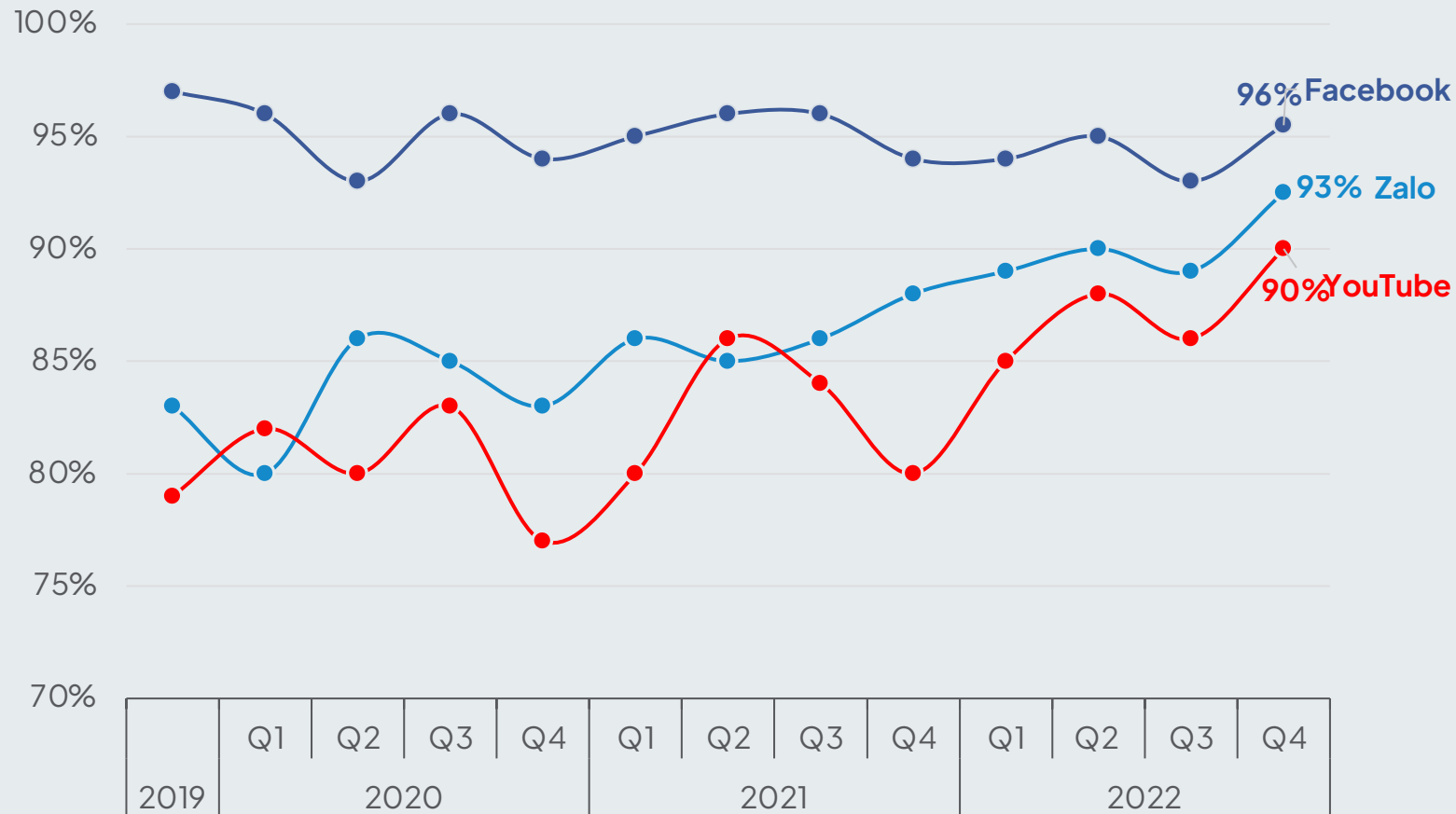
Key highlights

1. After a bleak Q3 2022, social media usage spiked in the last quarter of 2022. Giants such as Facebook and YouTube received tremendous boosts overall and across category usage.
2. Q4 2022 witnessed the decline of TikTok—albeit slight—despite the platform’s consistent growth since the beginning of the publication.
3. One area that TikTok continued to grow in is e-commerce, with a +5% increase in usage. However, this growth happens in a healthy landscape with major players experiencing increased usage overall.
4. Zalo – fast-rising on usage overall – broke through consecutive quarters of plateauing performance and gained 6% in favorability as a messaging app in Q4 2022.

Social Media Platforms



Top 3 social media platforms—Penetration rates (%)



Usage of the top 3 social media platforms increased in Q4 2022

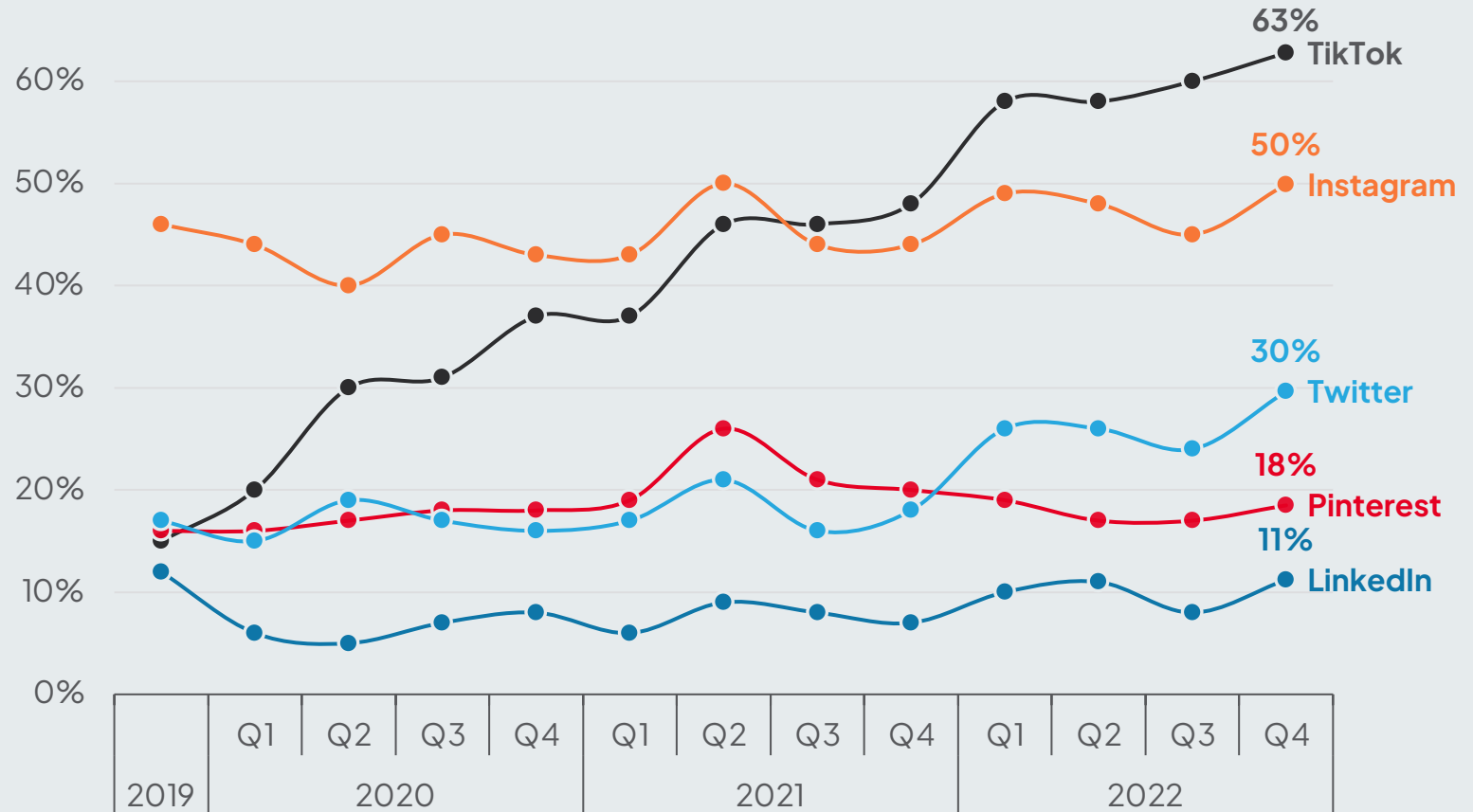
The usage of Zalo and YouTube rose faster than that of Facebook, helping Zalo to inch closer to being the most used social platform in Vietnam.

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

Q4 2022 n=1584

Overall increases in social media usage are observed across platforms

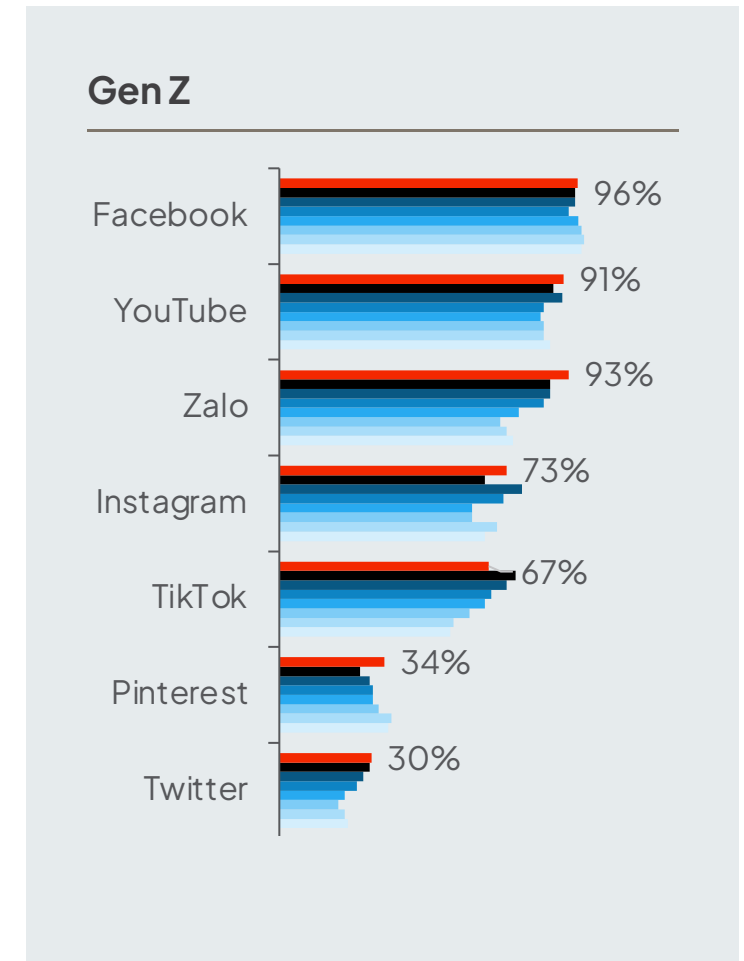
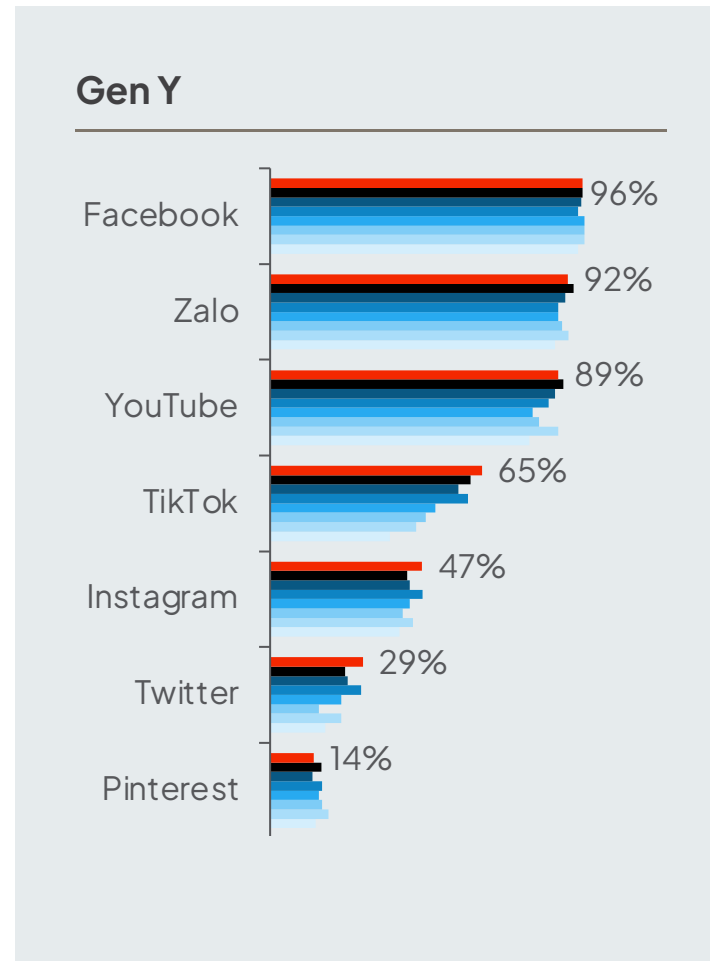
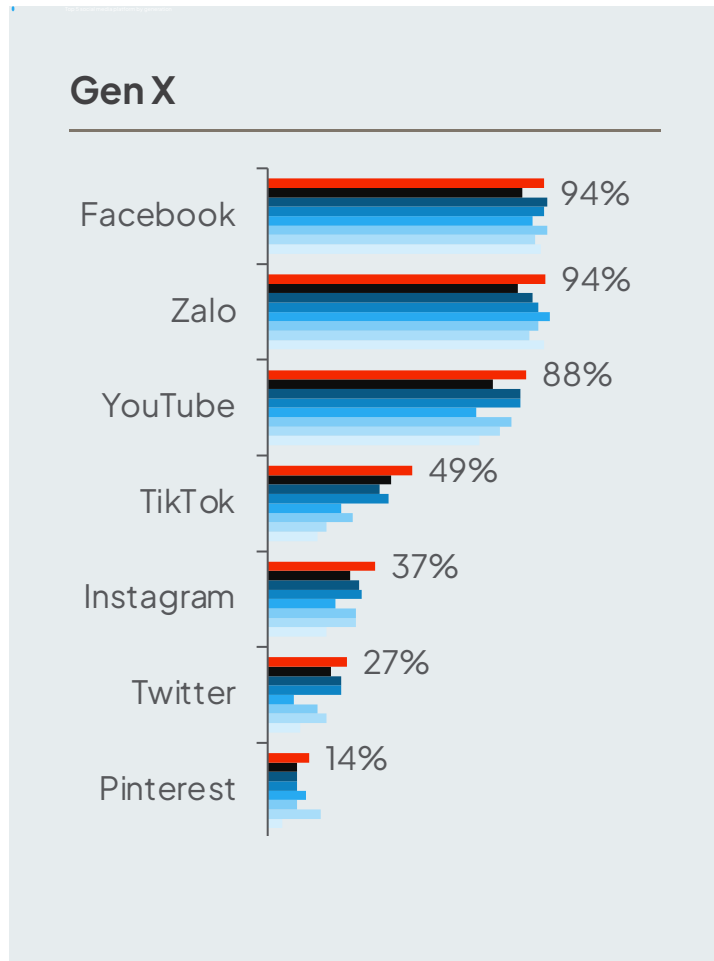
Top social media platforms—Penetration rates (%)



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

Q4 2022 n=1584

Majority of increases in usage came from Gen X across platforms. On the other hand, TikTok's usage decreased by 9% among Gen Z.

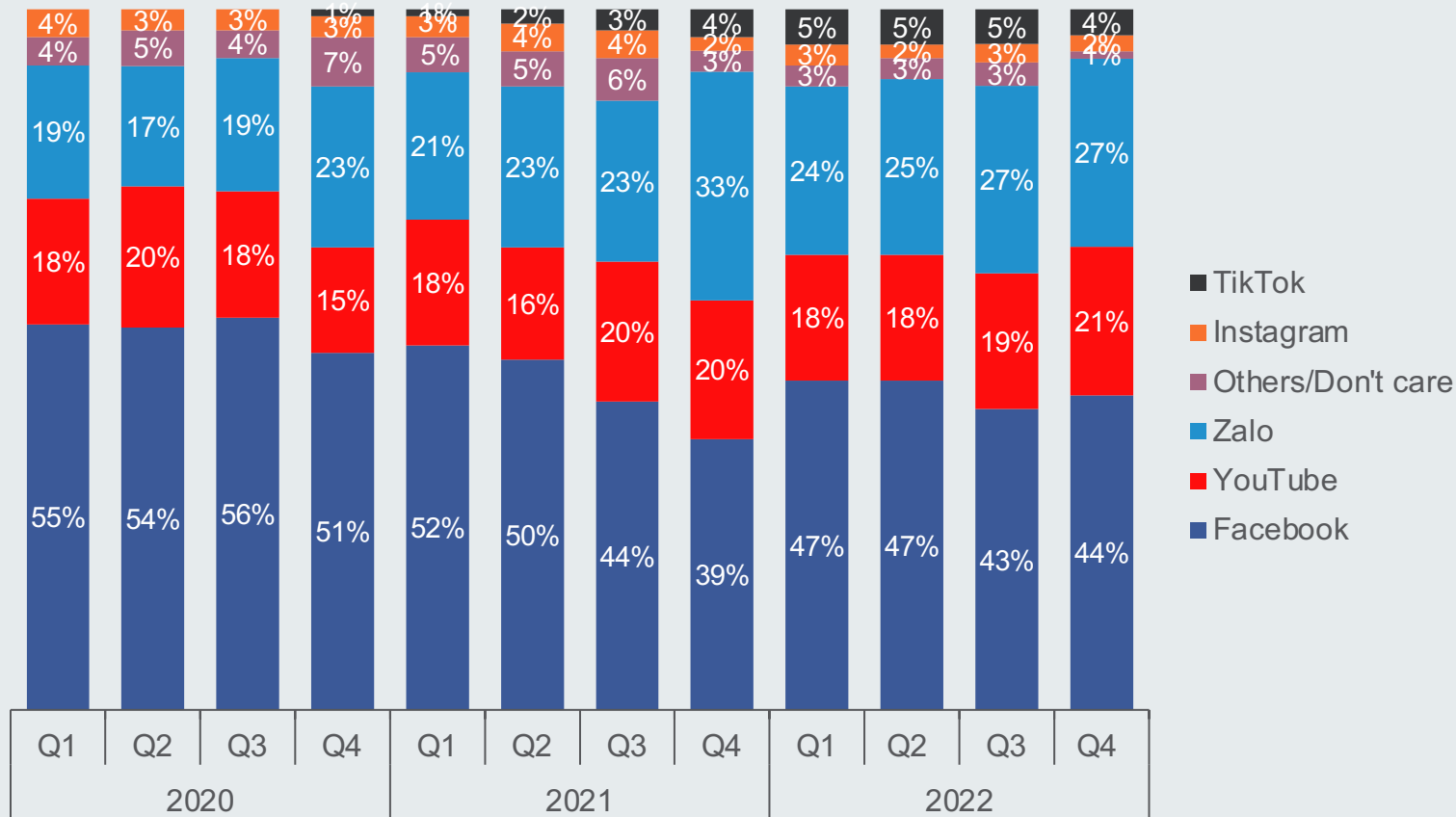


Q: Which of the following social media platforms are you using?
(Choose all that apply)

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

Gen Z n=513; Gen Y n=636; Gen X n=435

Consumers' primary applications

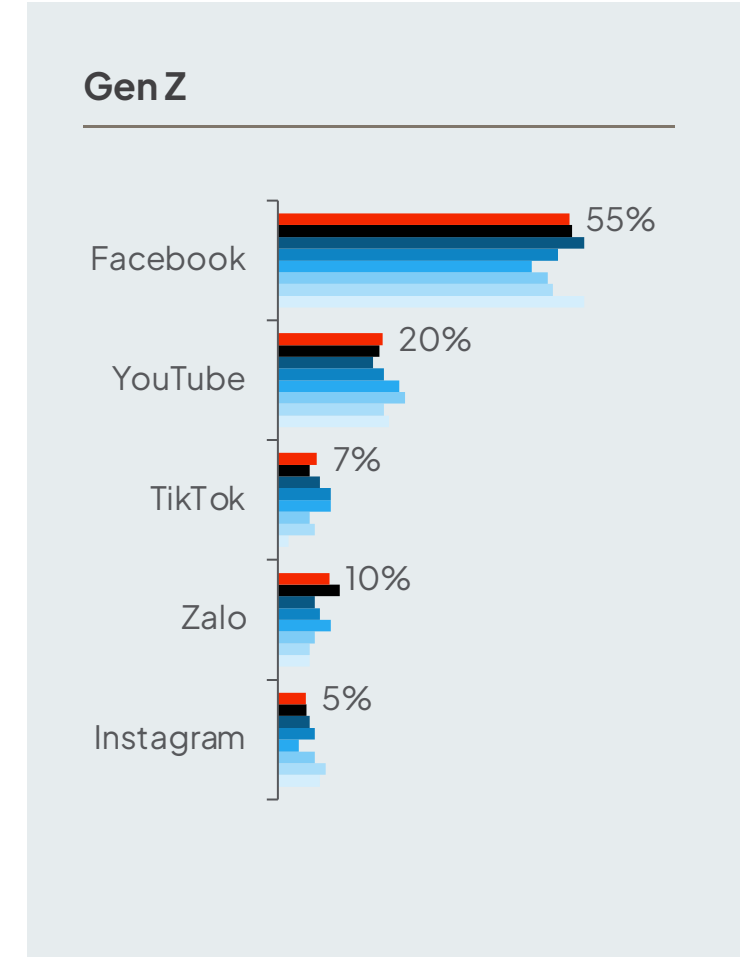
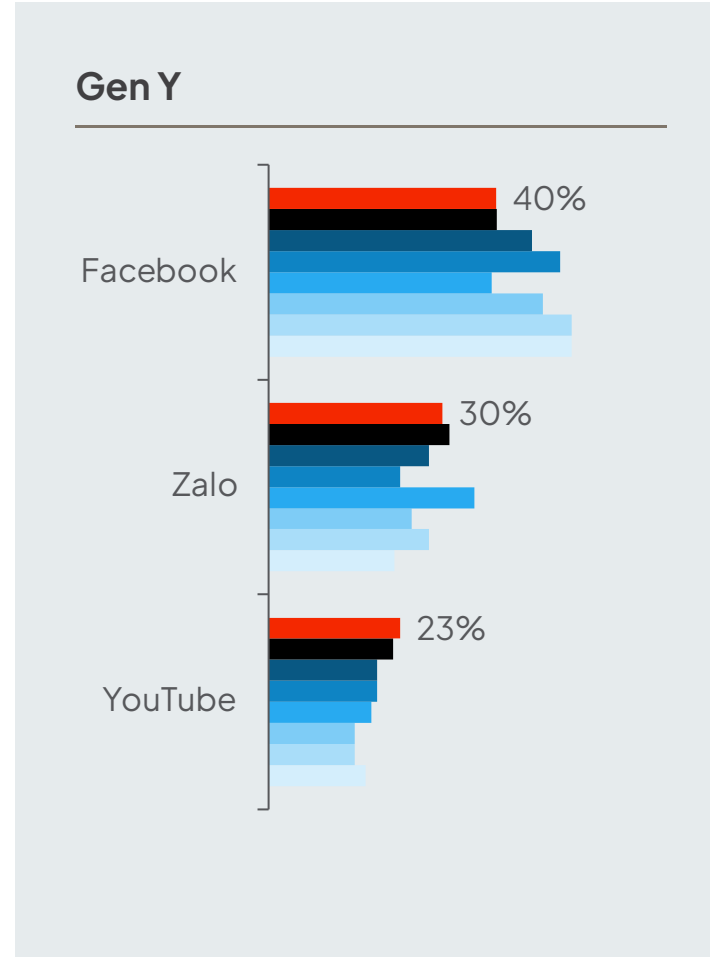
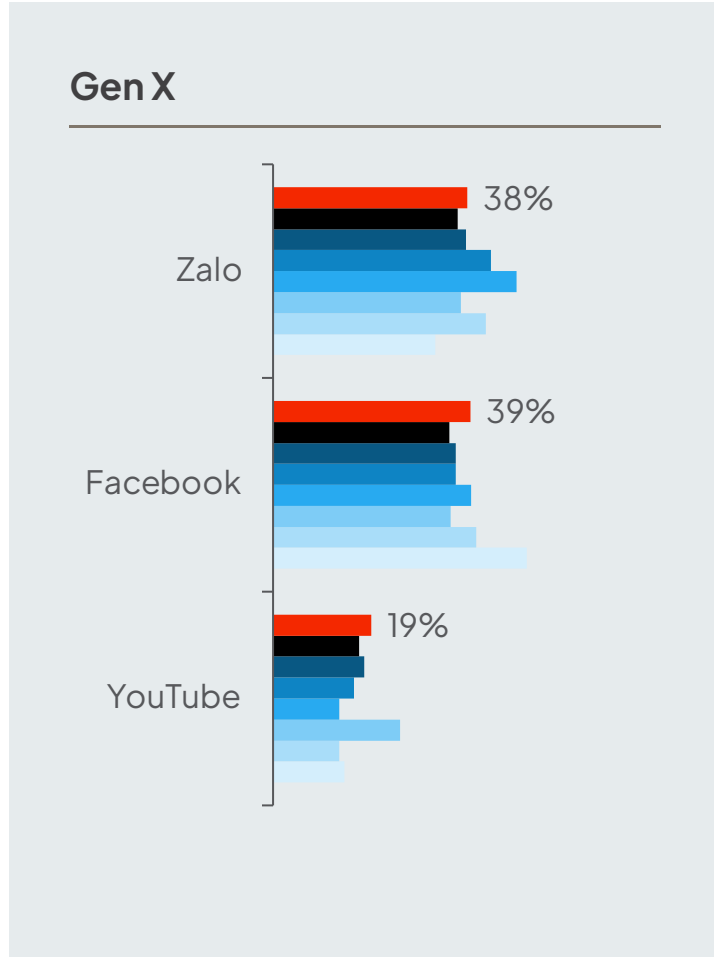


The primary position of TikTok decreased by 1%, while that of YouTube expanded.

Q: What is your one primary app?

Q4 2022 n=1584

YouTube's source of growth was apparent across age groups.



Q: What is your one primary app?

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

Gen Z n=513; Gen Y n=636; Gen X n=435

Messages

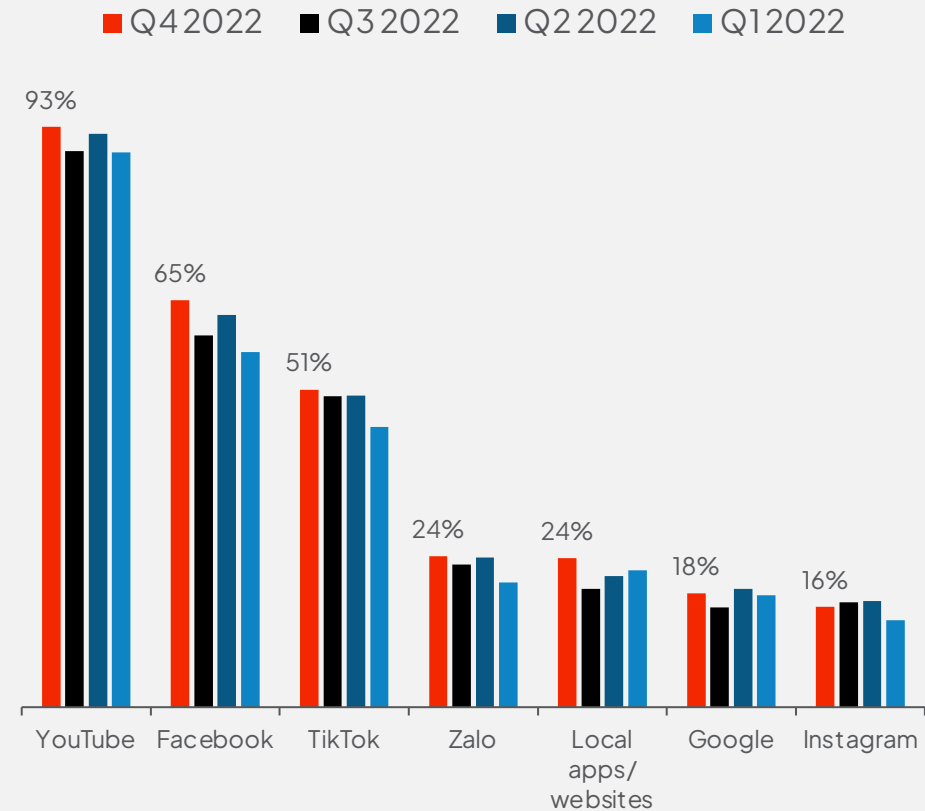
Platforms by Category



Entertainment Videos

The usage of YouTube and Facebook improved from Q3's setback, highlighting the comeback of the two platform giants.

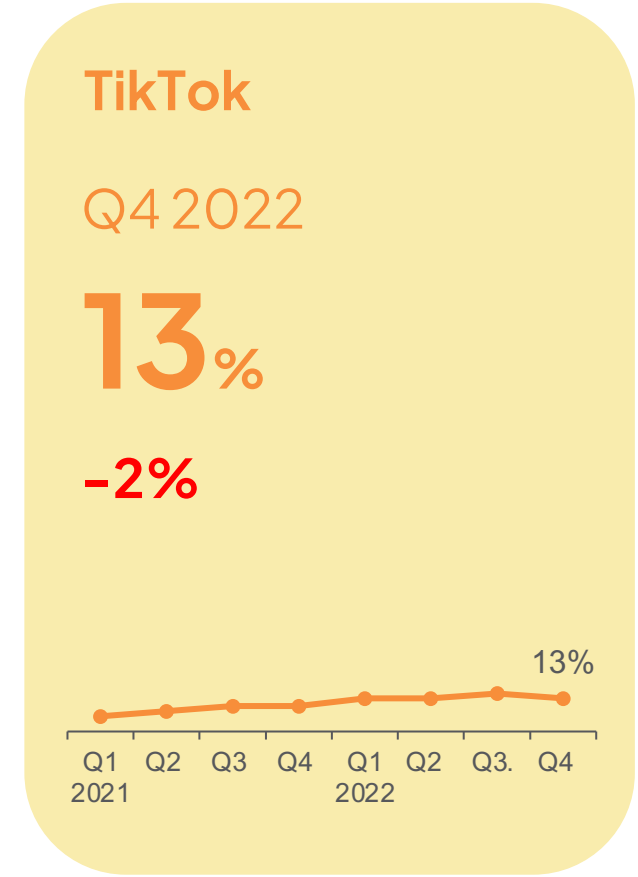
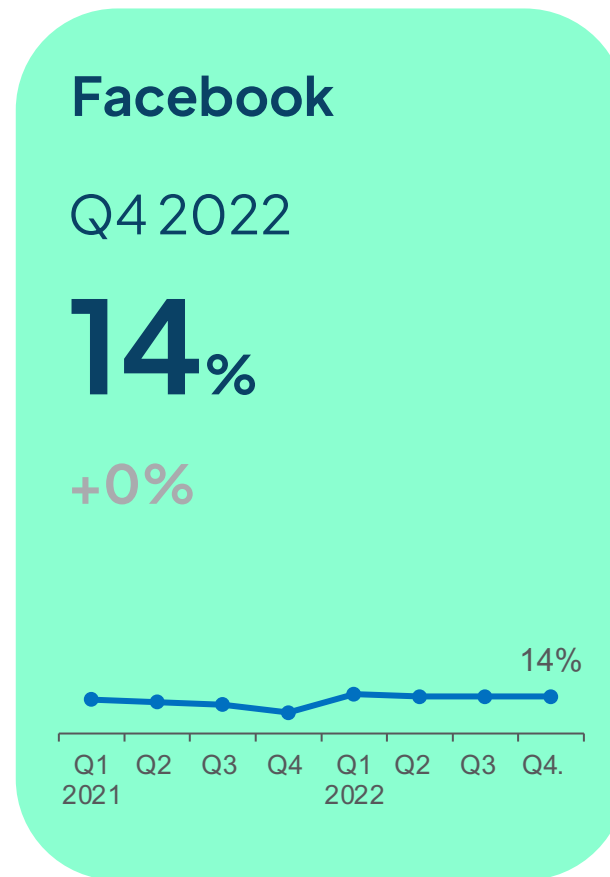
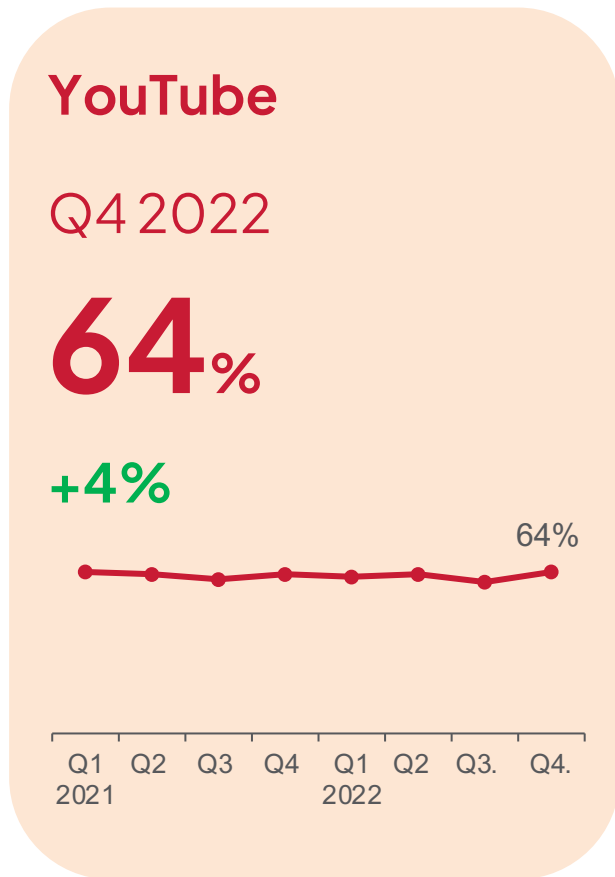
Top platforms for entertainment videos—Penetration rates (%)



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

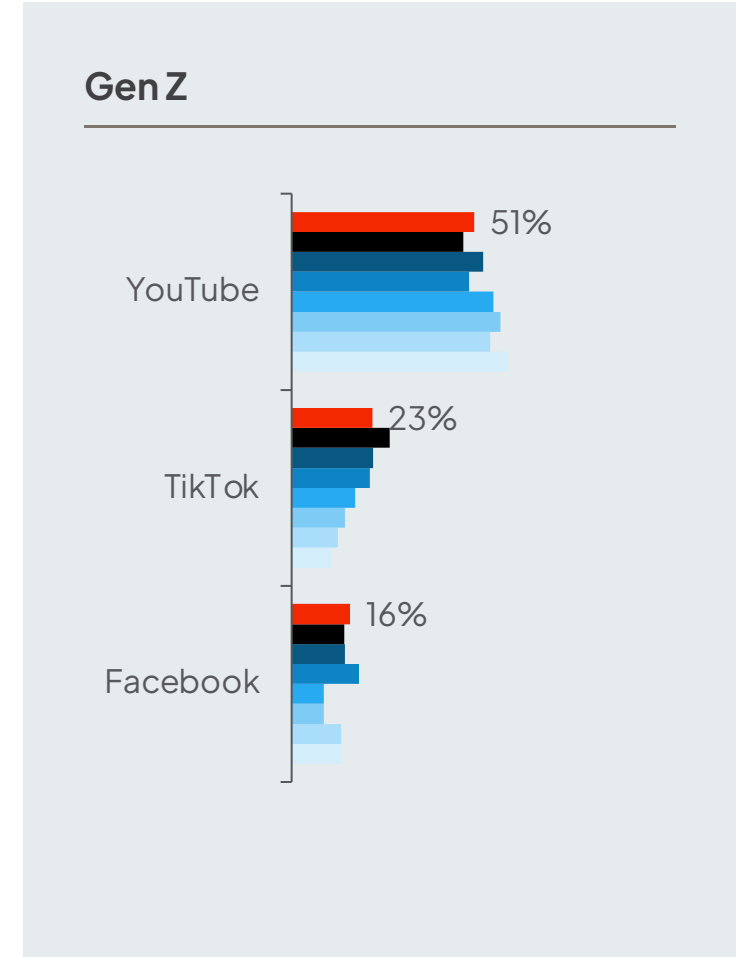
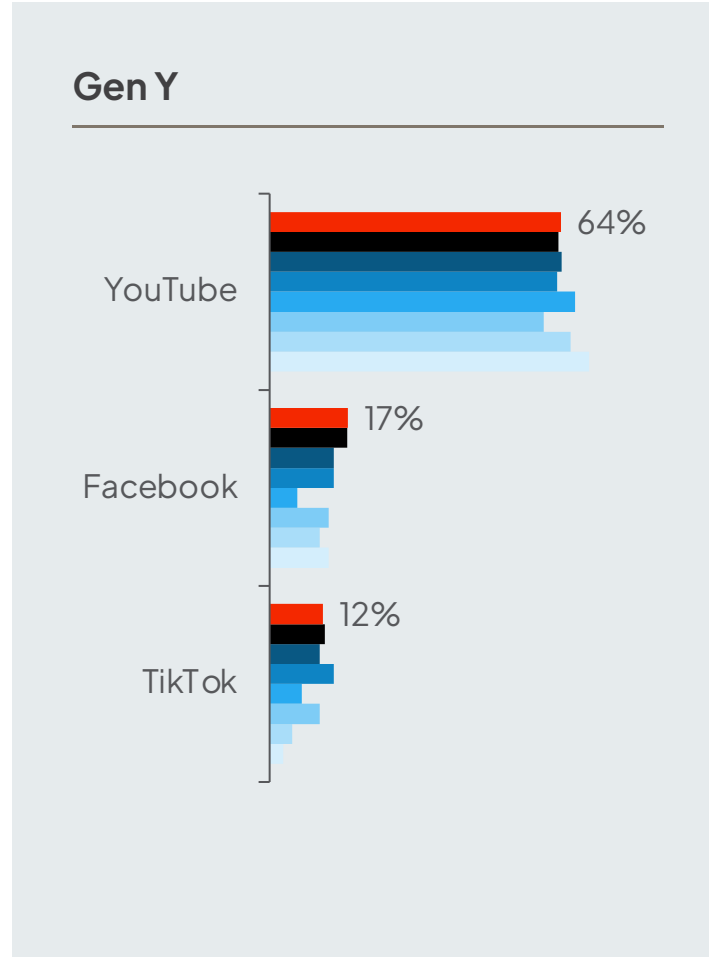
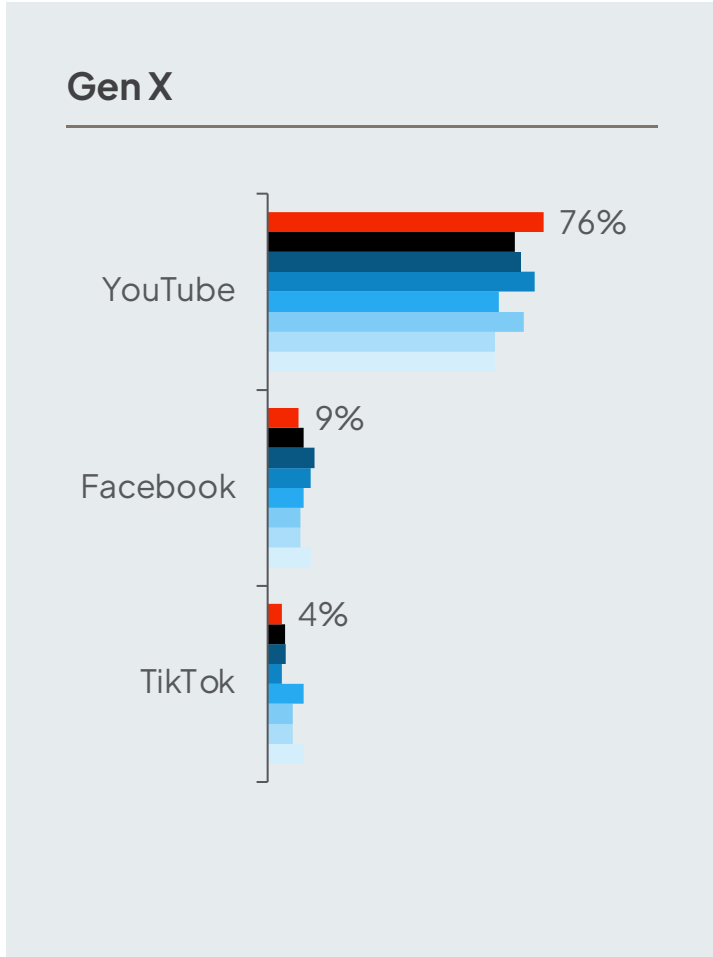
Q4 2022
n=1584

Furthermore, YouTube regained 4% in consumer favorability, while TikTok encountered the first setback ever.



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

YouTube's revival can be seen among Gen X (+8%) and Gen Z (+3%), while the latter is growing less favored of TikTok (-5%)



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

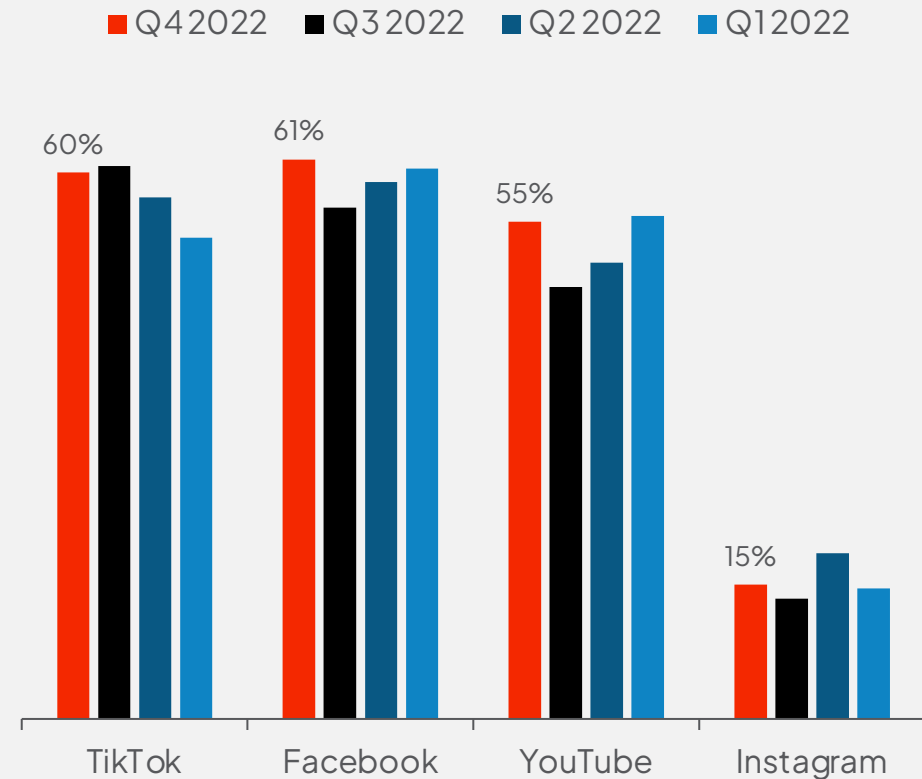
■ Q4 2022
 ■ Q3 2022
 ■ Q2 2022
 ■ Q1 2022
■ Q4 2021
 ■ Q3 2021
 ■ Q2 2021
 ■ Q1 2021

Gen Z n=513; Gen Y n=636; Gen X n=435

Short Videos

Facebook Reels and YouTube Shorts gained new grounds in the short videos category, making Facebook tie with TikTok as the most used platforms for short-videos.

Top platforms for short videos—Penetration rates (%)



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

Q4 2022
n=1584

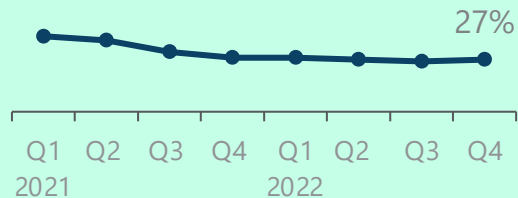
A slight decrease (-1%) in consumer favorability can be seen for TikTok.

Facebook

Q4 2022

27%

+1%

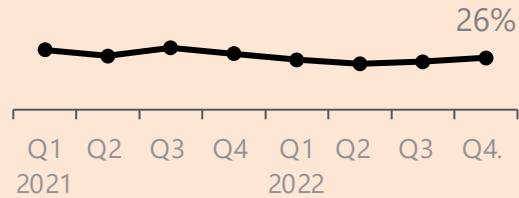


YouTube

Q4 2022

26%

+2%



TikTok

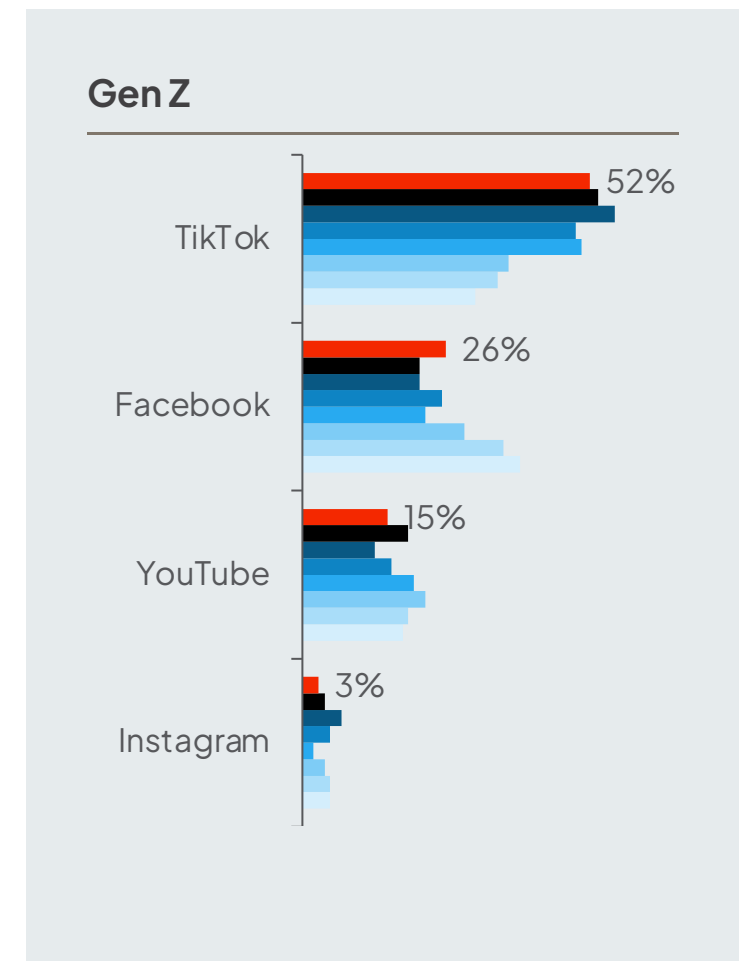
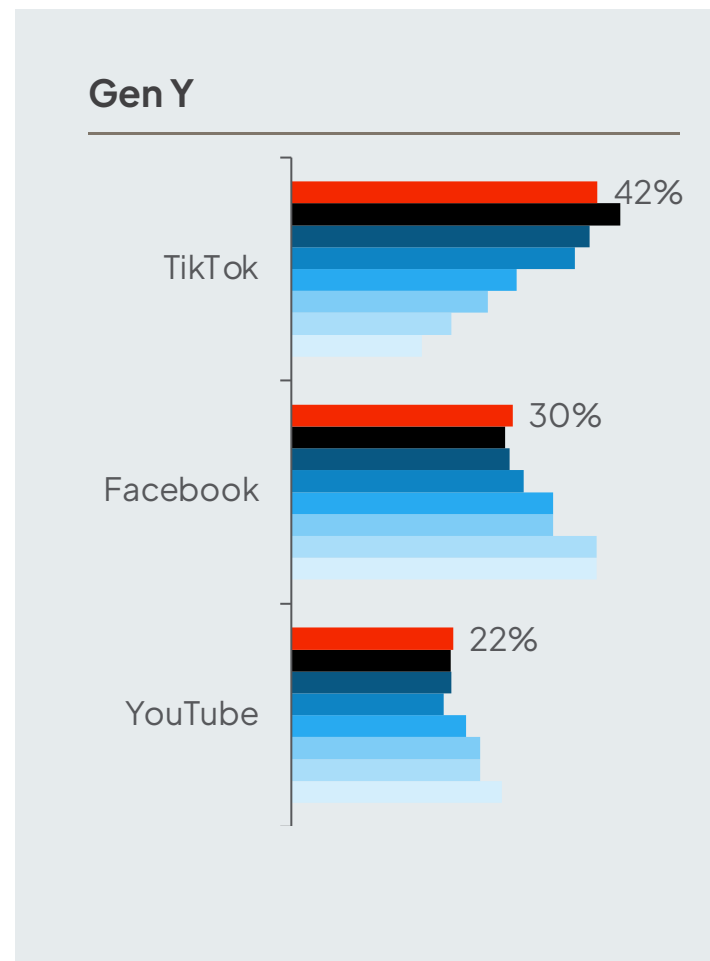
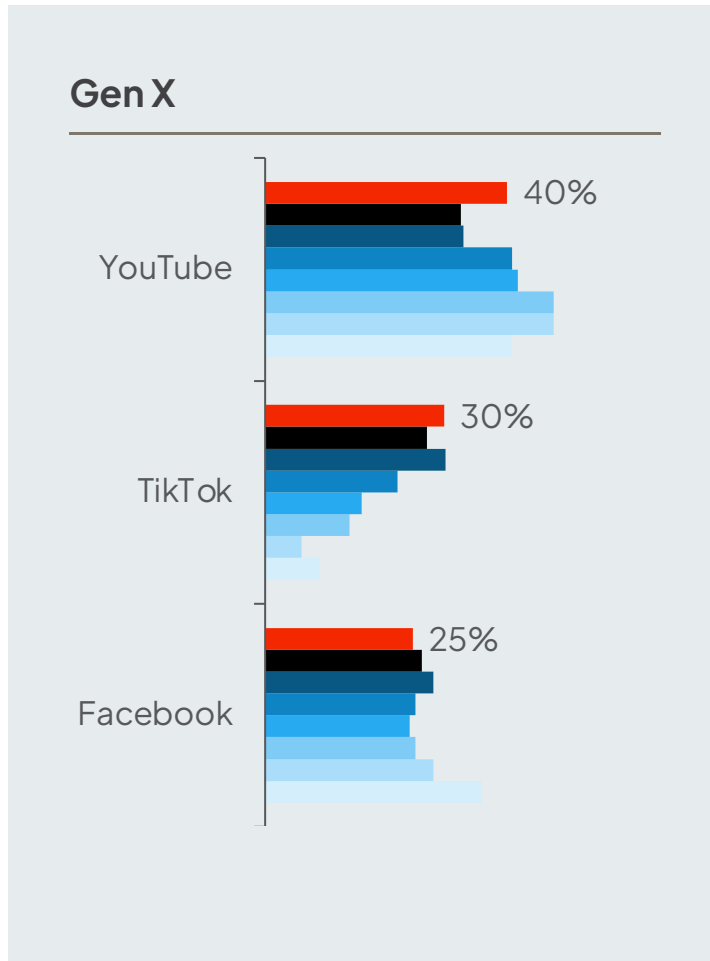
Q4 2022

41%

-1%



TikTok's favorability decline continues a two-quarter trend among Gen Z and is starting to show for Gen Y



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

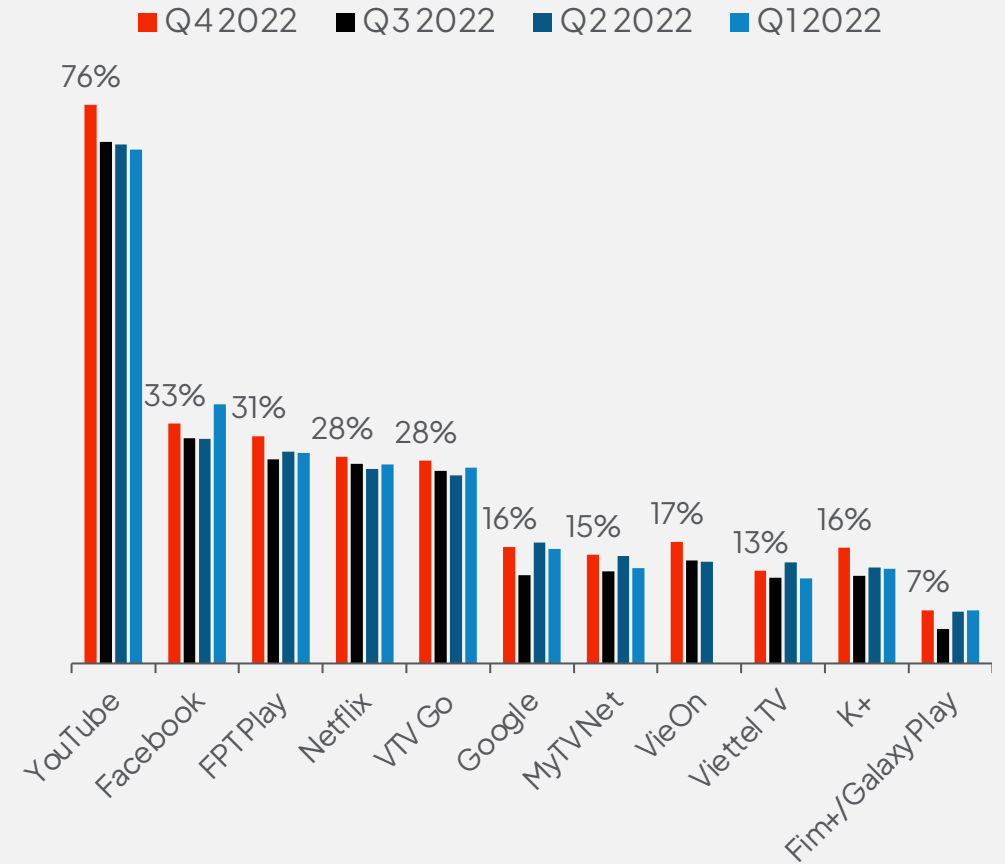
■ Q4 2022
 ■ Q3 2022
 ■ Q2 2022
 ■ Q1 2022
■ Q4 2021
 ■ Q3 2021
 ■ Q2 2021
 ■ Q1 2021

Gen Z n=513; Gen Y n=636; Gen X n=435

Movies Streaming

YouTube’s regaining of popularity can be seen in the Movies category as well. Individual local players all see rising levels of usage.

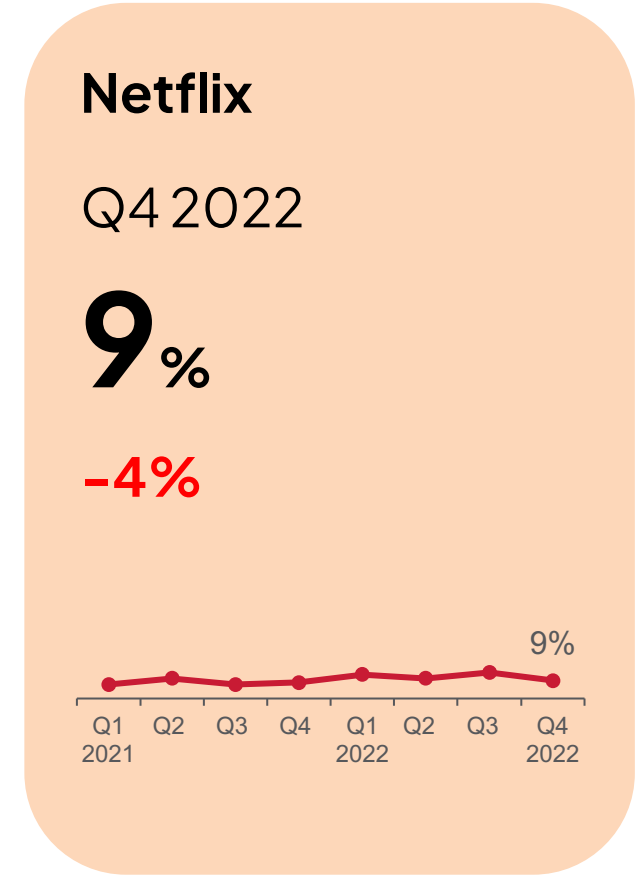
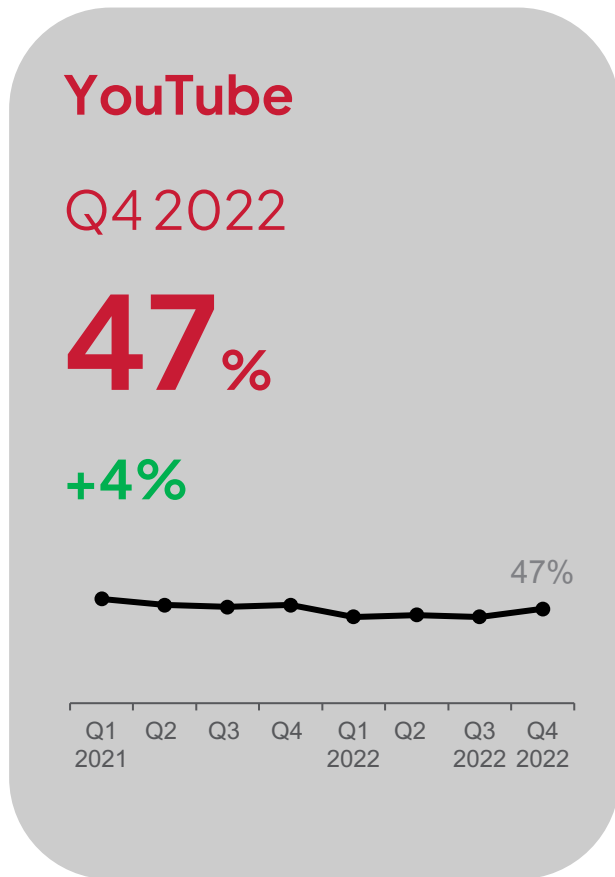
Top platforms for movies streaming—Penetration rates (%)



Q: Which website/apps do you use to watch movies/TV shows?
Choose all that apply.

Q4 2022
n=1584

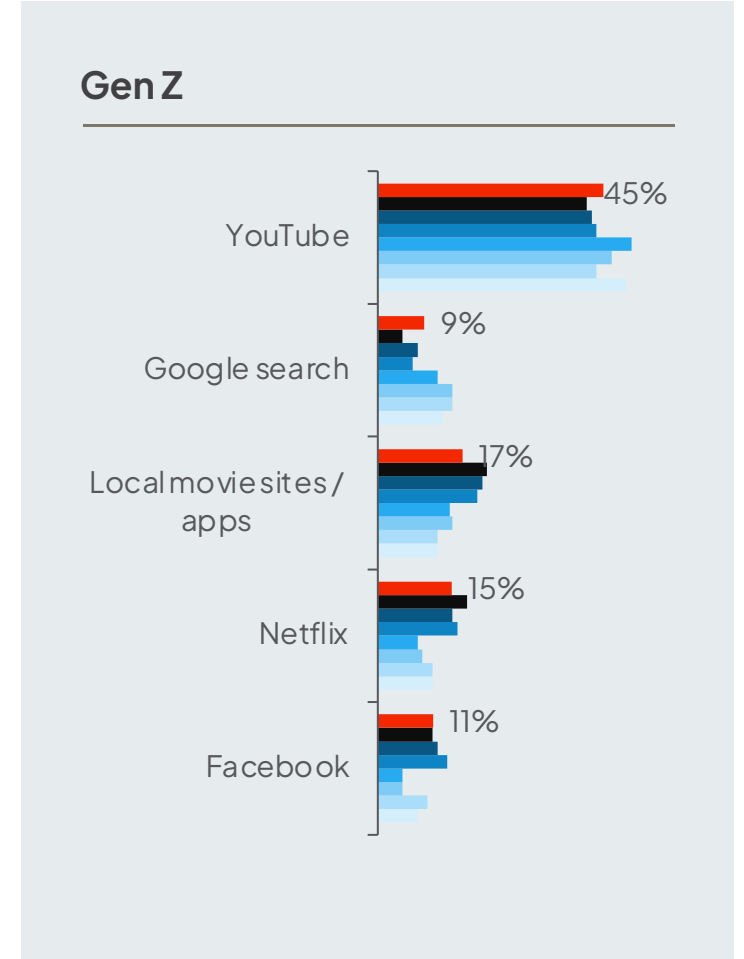
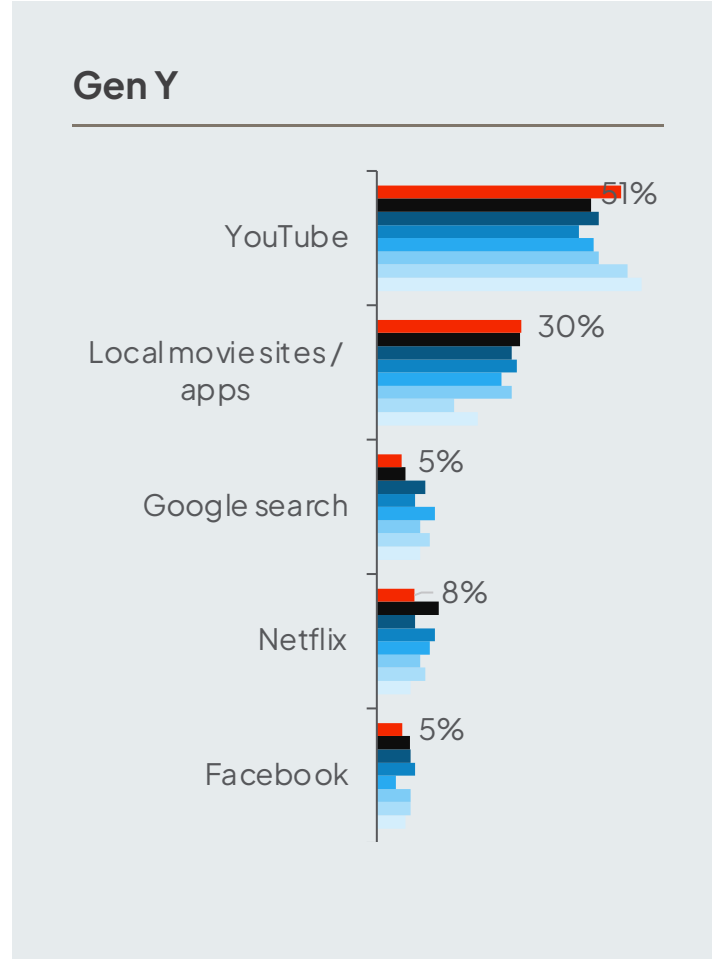
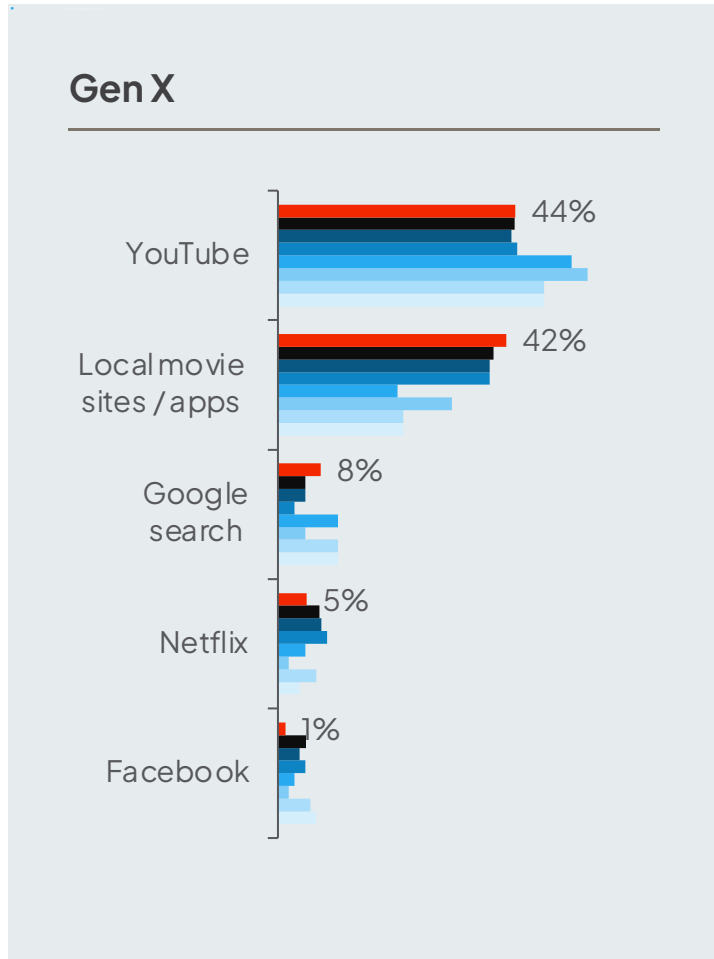
Yet, only YouTube gained favorability from consumers in Q4'22. Though consumers use local platforms more, they don't prefer them more.



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

YouTube's resurging position can be observed among Gen Y and Gen Z consumers.



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

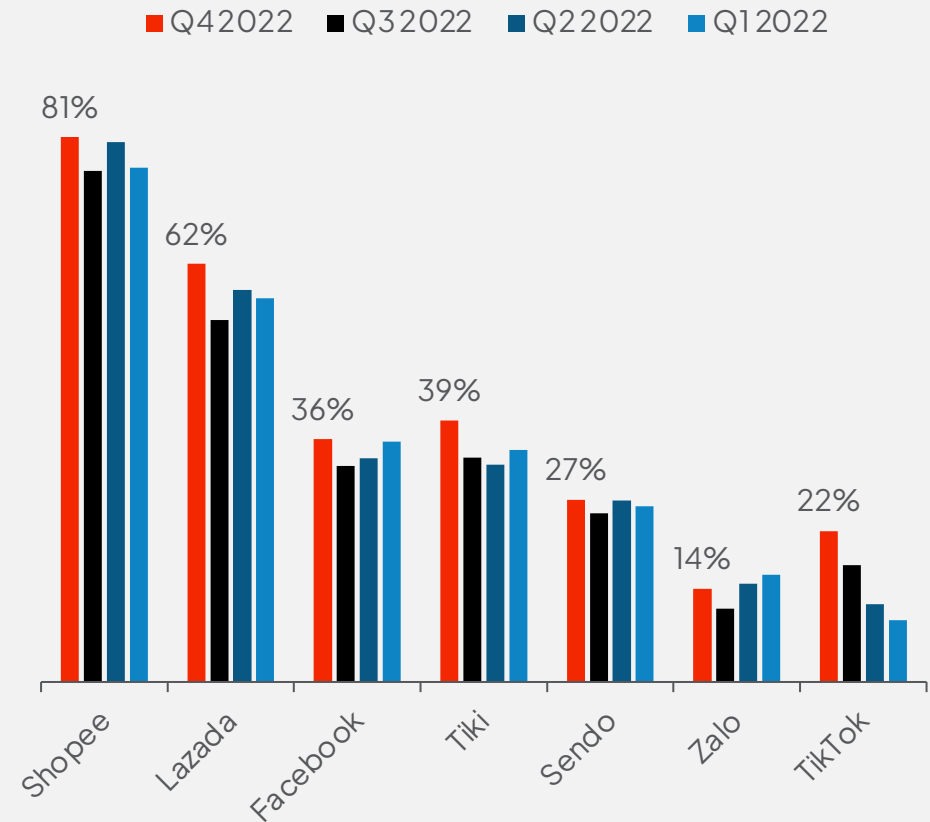
■ Q4 2022
 ■ Q3 2022
 ■ Q2 2022
 ■ Q1 2022
■ Q4 2021
 ■ Q3 2021
 ■ Q2 2021
 ■ Q1 2021

Gen Z n=513; Gen Y n=636; Gen X n=435

E-Commerce Platforms

Q4 2022 saw the continued rise of TikTok, growing 5% QoQ. E-Commerce platforms usage rebounded overall from the previous quarter.

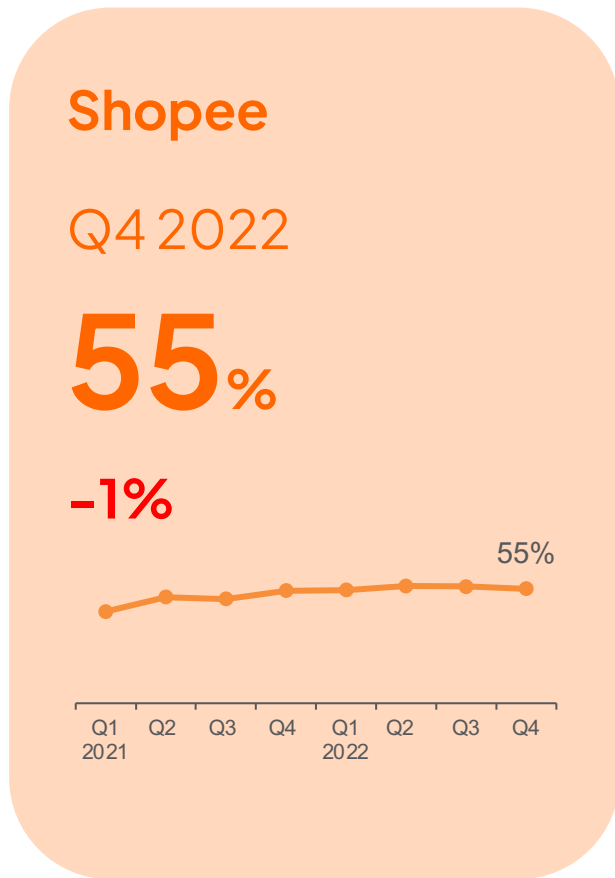
Top platforms for E-commerce—Penetration rates (%)



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

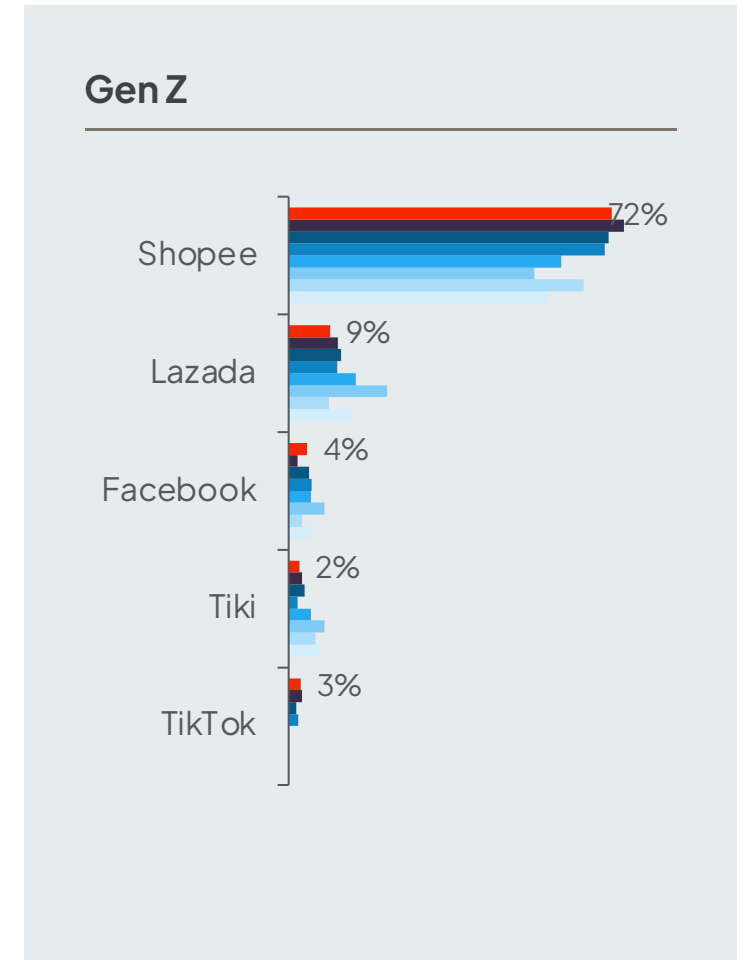
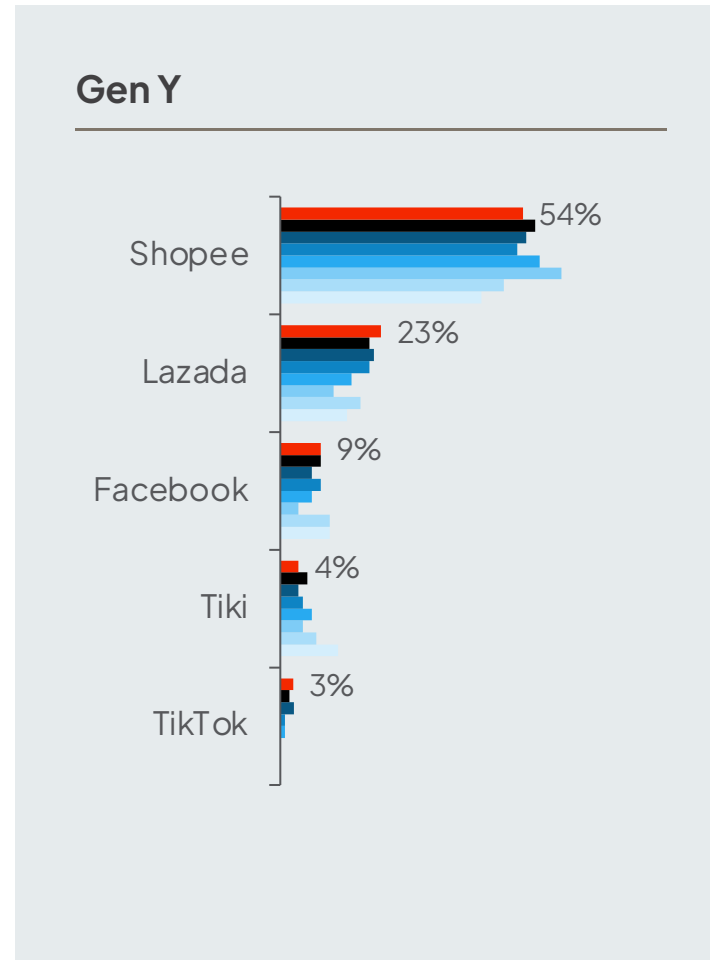
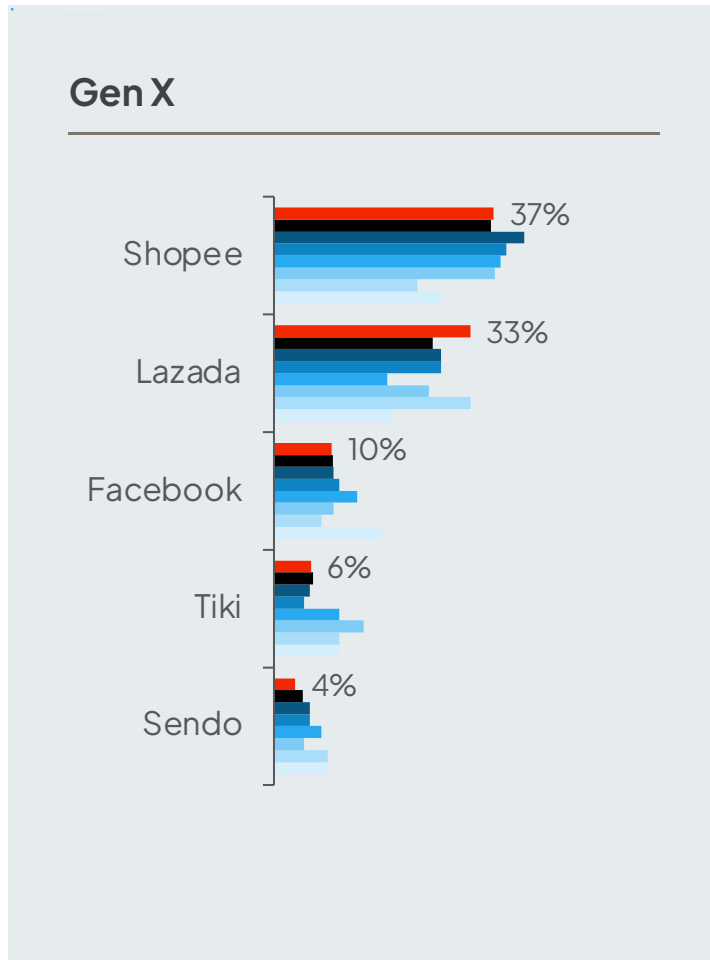
Q4 2022
n=1584

Shopee's status as the go-to platform for e-commerce remains unchallenged in Q4'22



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

That said, favorability for Lazada grew strongly among Gen X (+6%) and Gen Y (+3%), posing some challenges to Shopee.



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

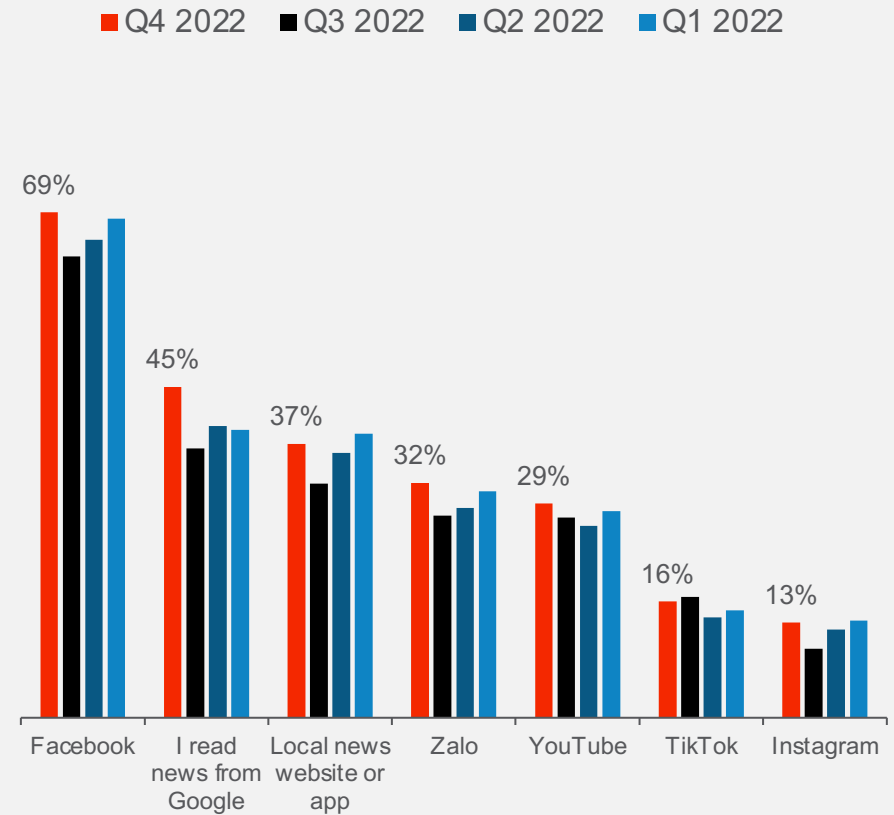
■ Q4 2022
 ■ Q3 2022
 ■ Q2 2022
 ■ Q1 2022
■ Q4 2021
 ■ Q3 2021
 ■ Q2 2021
 ■ Q1 2021

Gen Z n=513; Gen Y n=636; Gen X n=435

News

After consecutive quarters of overall declines, consumers show interests in using platforms for news.

Top platforms for news—Penetration rates (%)



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

Q4 2022
n=1584

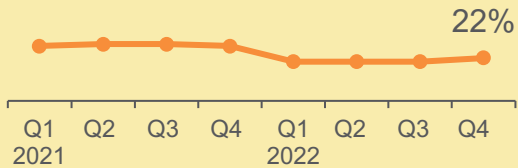
Favorability for using platforms for reading news grew for all platforms in the Top 3

Google Search

Q4 2022

22%

+2%

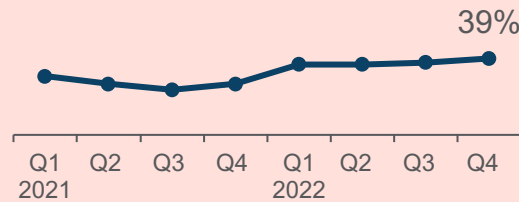


Facebook

Q4 2022

39%

+2%

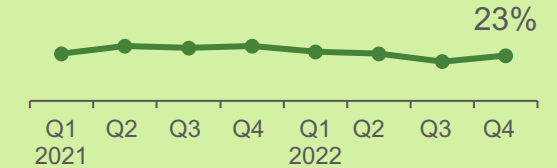


Local publishers

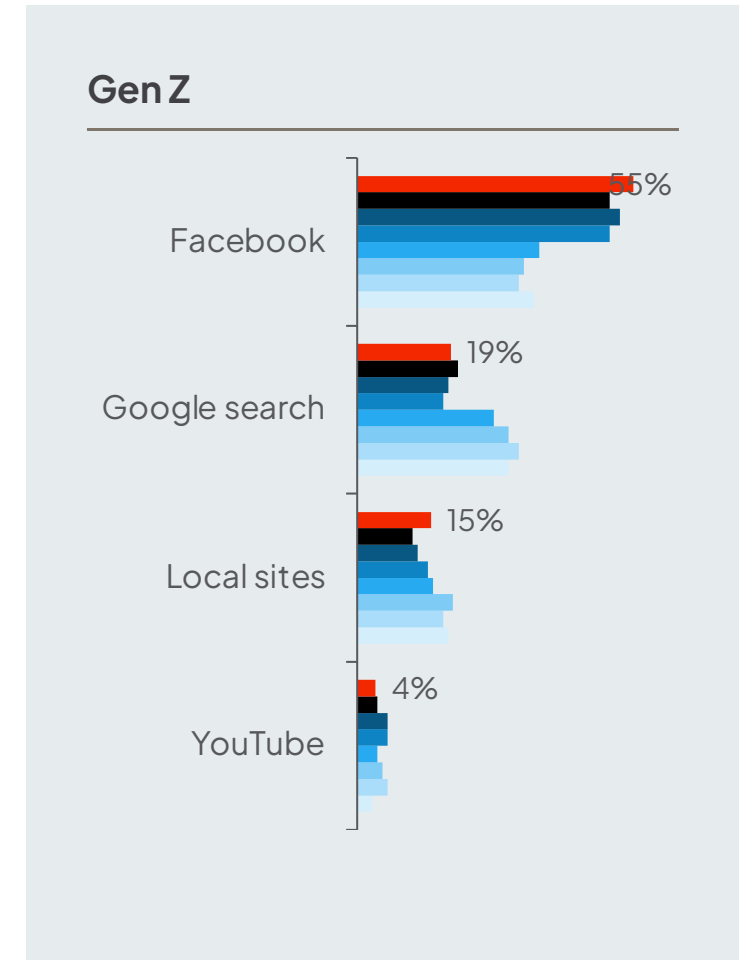
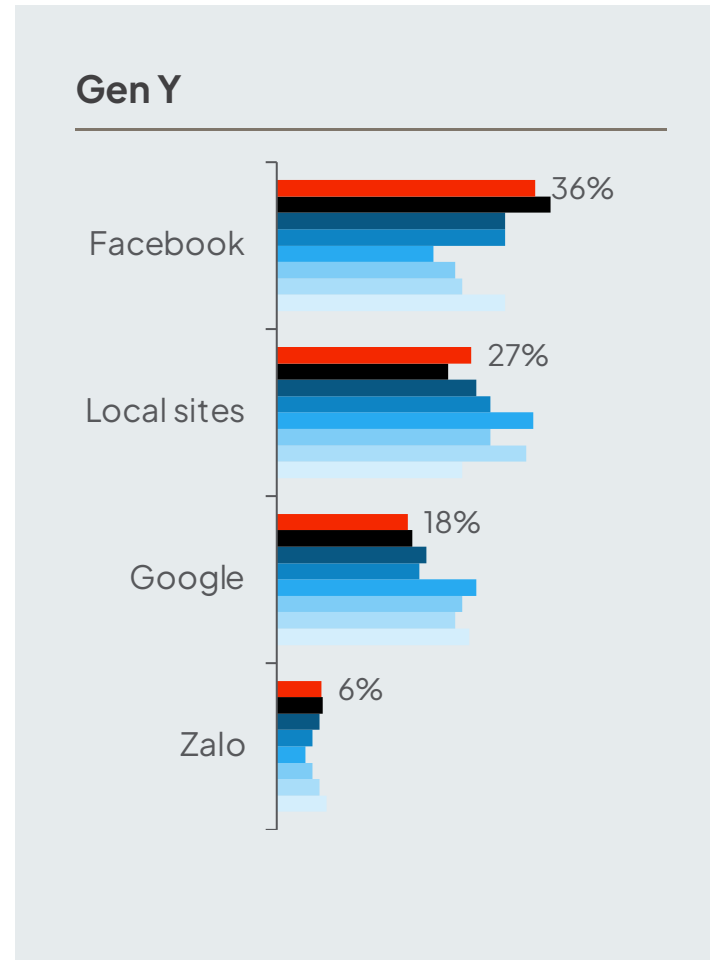
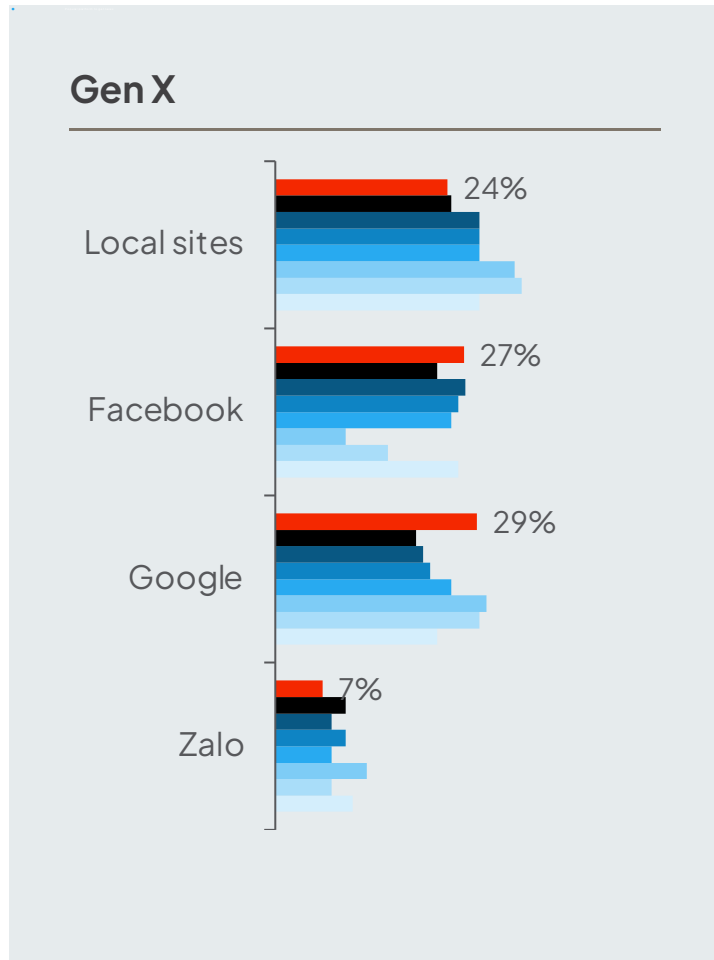
Q4 2022

23%

+3%



Quarter 4 2022 saw Gen X consumers flocking to Google for news searching. Facebook improved favorability among Gen Z



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

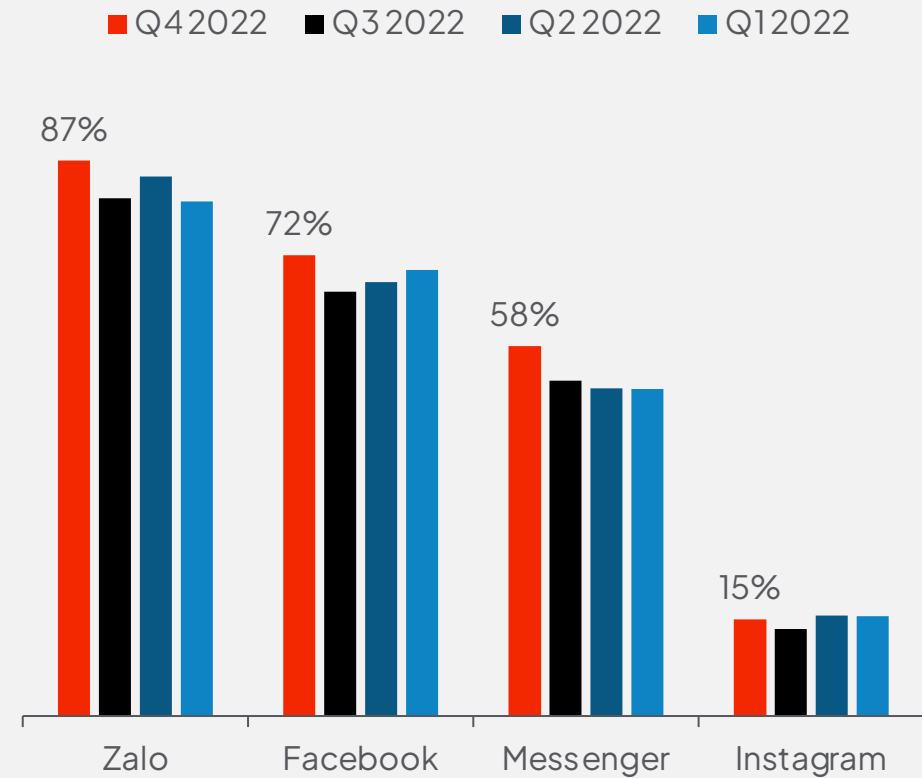
■ Q4 2022
 ■ Q3 2022
 ■ Q2 2022
 ■ Q1 2022
■ Q4 2021
 ■ Q3 2021
 ■ Q2 2021
 ■ Q1 2021

Gen Z n=513; Gen Y n=636; Gen X n=435

Messaging

Messaging platforms were more utilized in Q4 2022, with usage increasing across platforms.

Top platforms for messaging—Penetration rates (%)



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

Q4 2022
n=1584

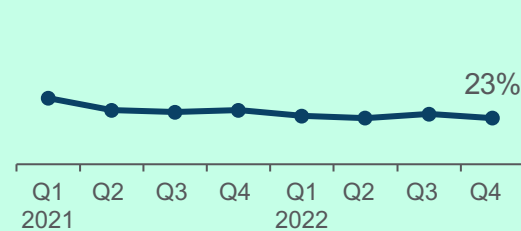
Zalo broke through the “glass ceiling”, earning 6% increase in favorability, further solidifying position in the category

Facebook

Q4 2022

23%

-2%

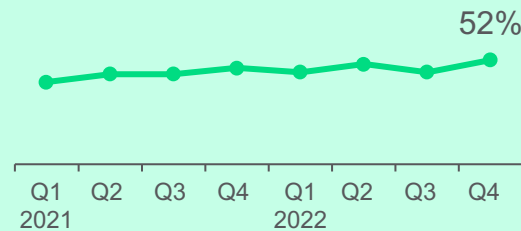


Zalo

Q4 2022

52%

+6%

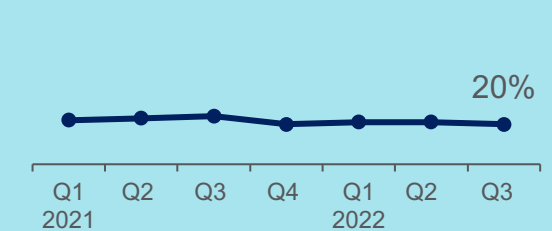


Messenger

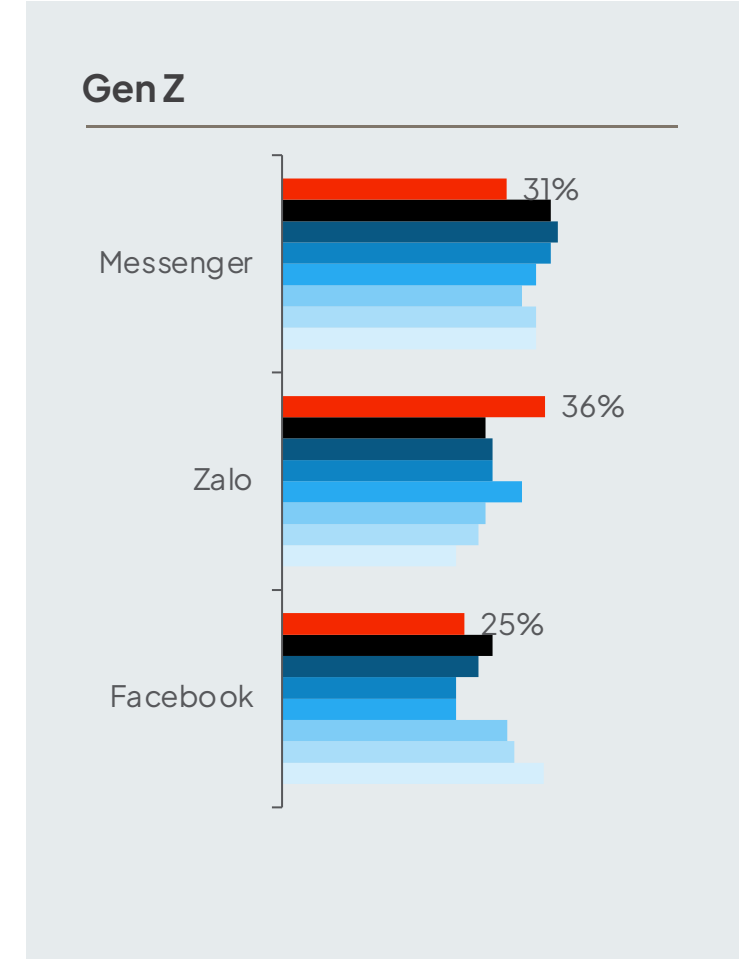
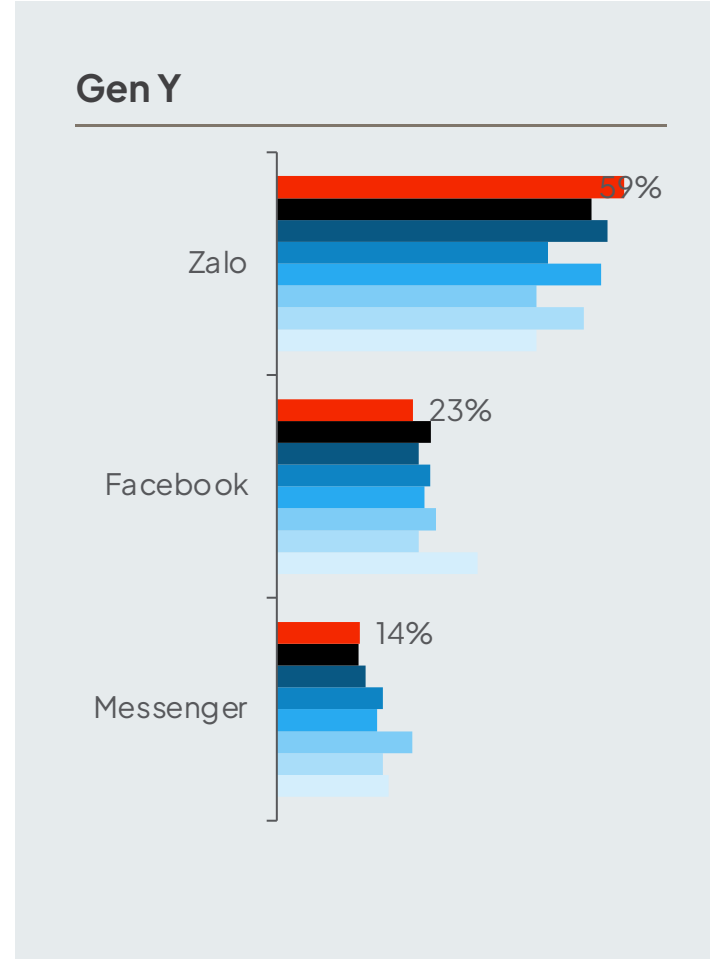
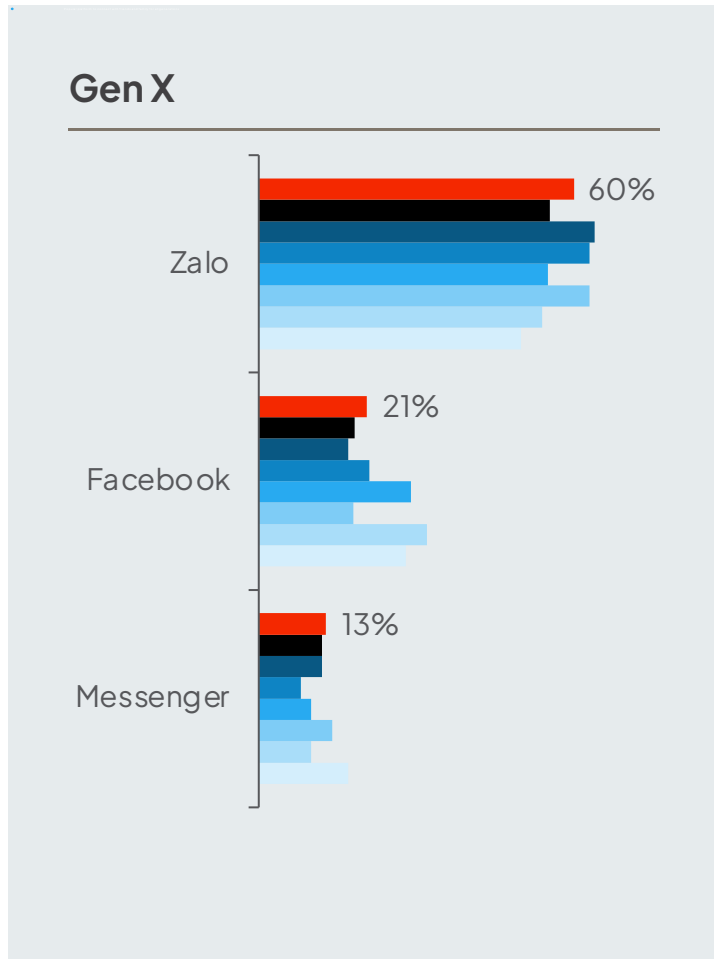
Q4 2022

20%

+0%



Favorability for Zalo among Gen Z jumped 8%, highlighting an important source of growth for this channel, besides regaining lost grounds for the other age groups



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

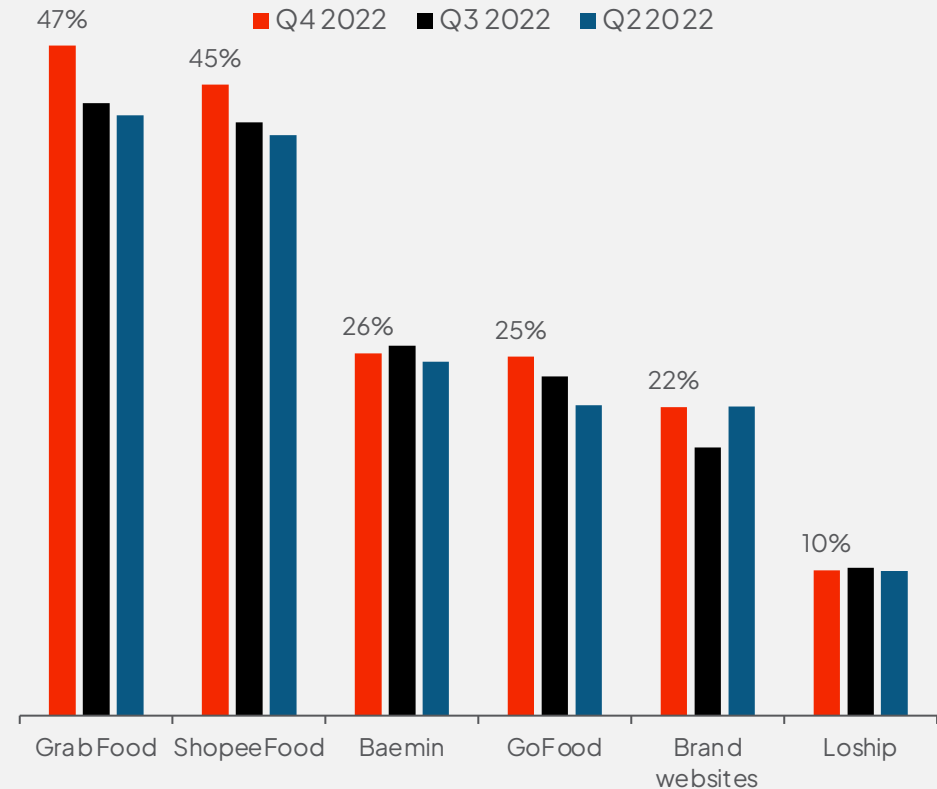
■ Q4 2022
 ■ Q3 2022
 ■ Q2 2022
 ■ Q1 2022
■ Q4 2021
 ■ Q3 2021
 ■ Q2 2021
 ■ Q1 2021

Gen Z n=513; Gen Y n=636; Gen X n=435

Food Delivery Apps

The top 2 apps, GrabFood and ShopeeFood, continued to be used more by Vietnamese consumers.

Top food delivery apps—Penetration rates (%)



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

Q4 2022
n=1584

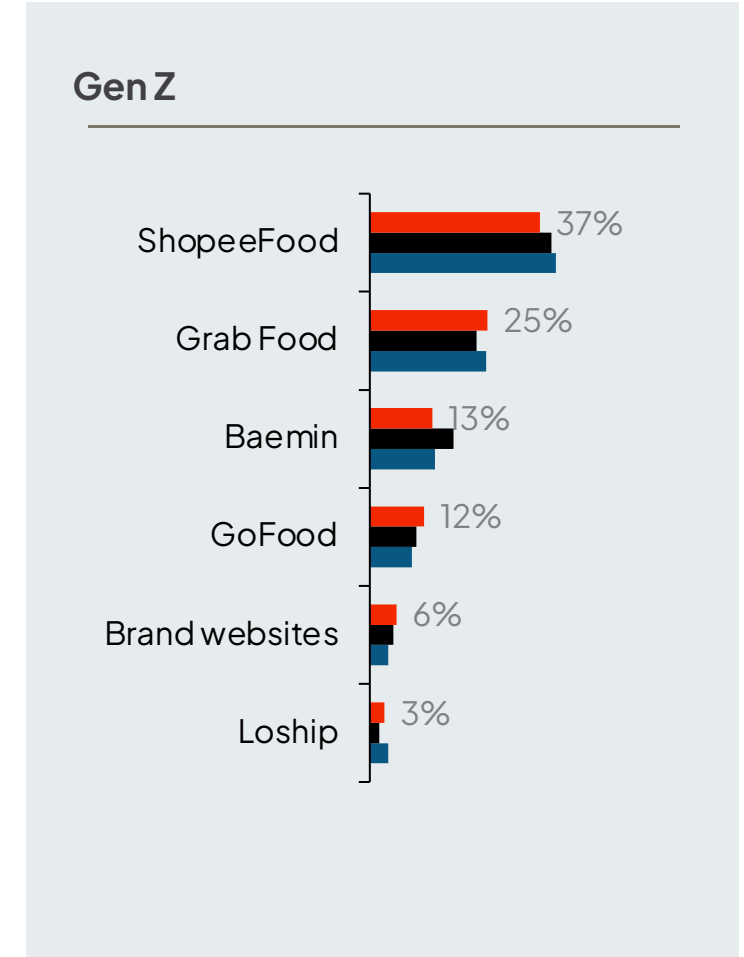
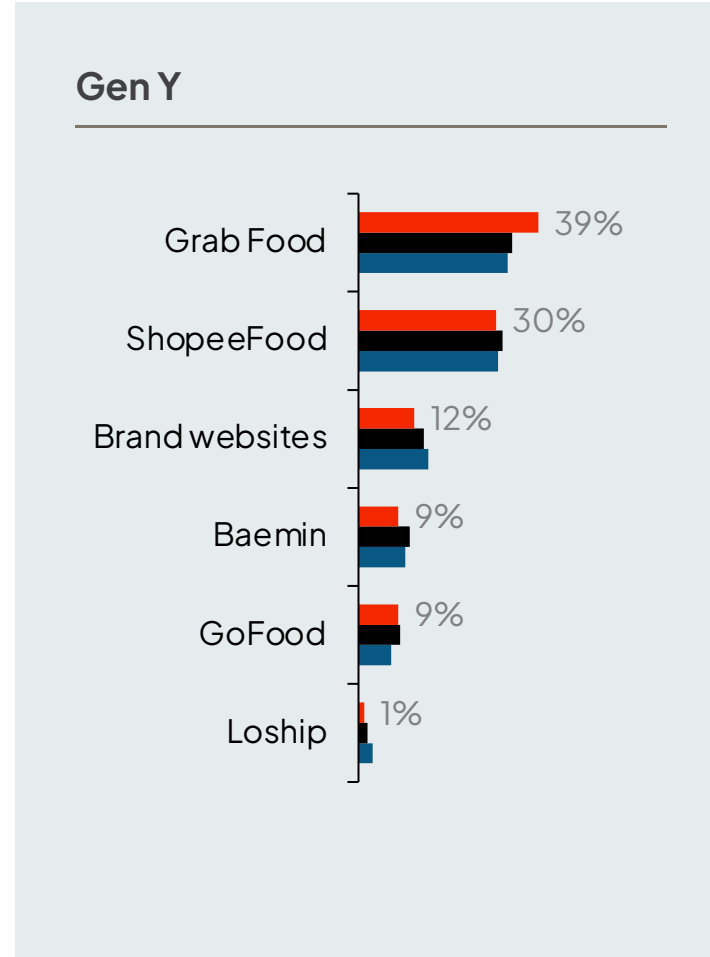
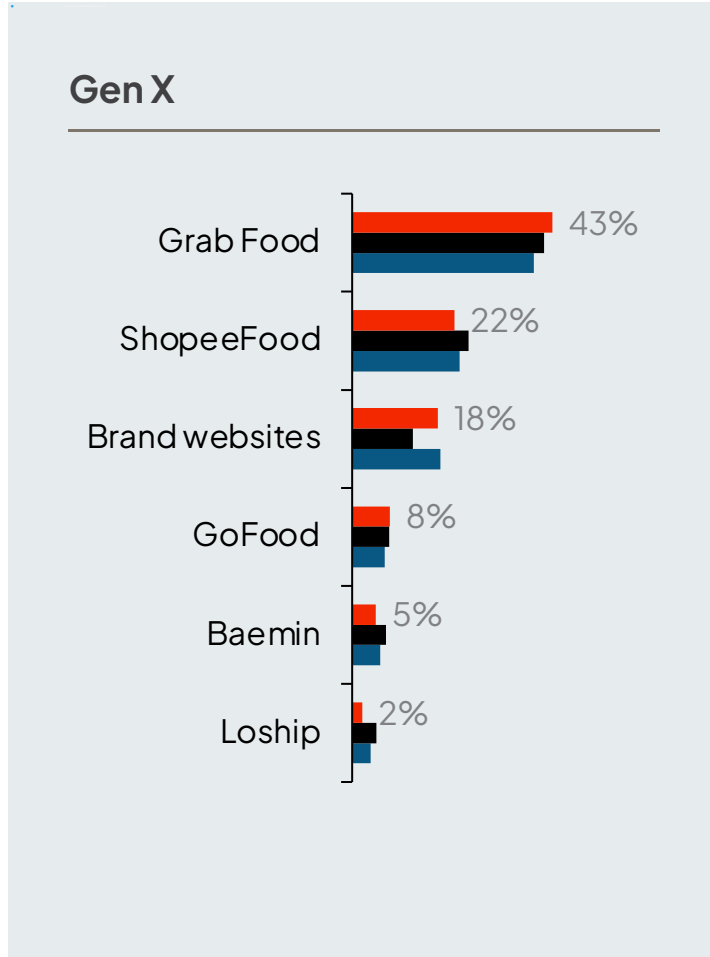
However, only GrabFood gained preference from users. Baemin, given its lower usage in Q4'22, also suffered from diminished favorability from users.



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

Q4 2022 n=1584

GrabFood kept winning Gen X and Gen Y age groups, while ShopeeFood's favorability kept riding a downward trend among Gen Z consumers



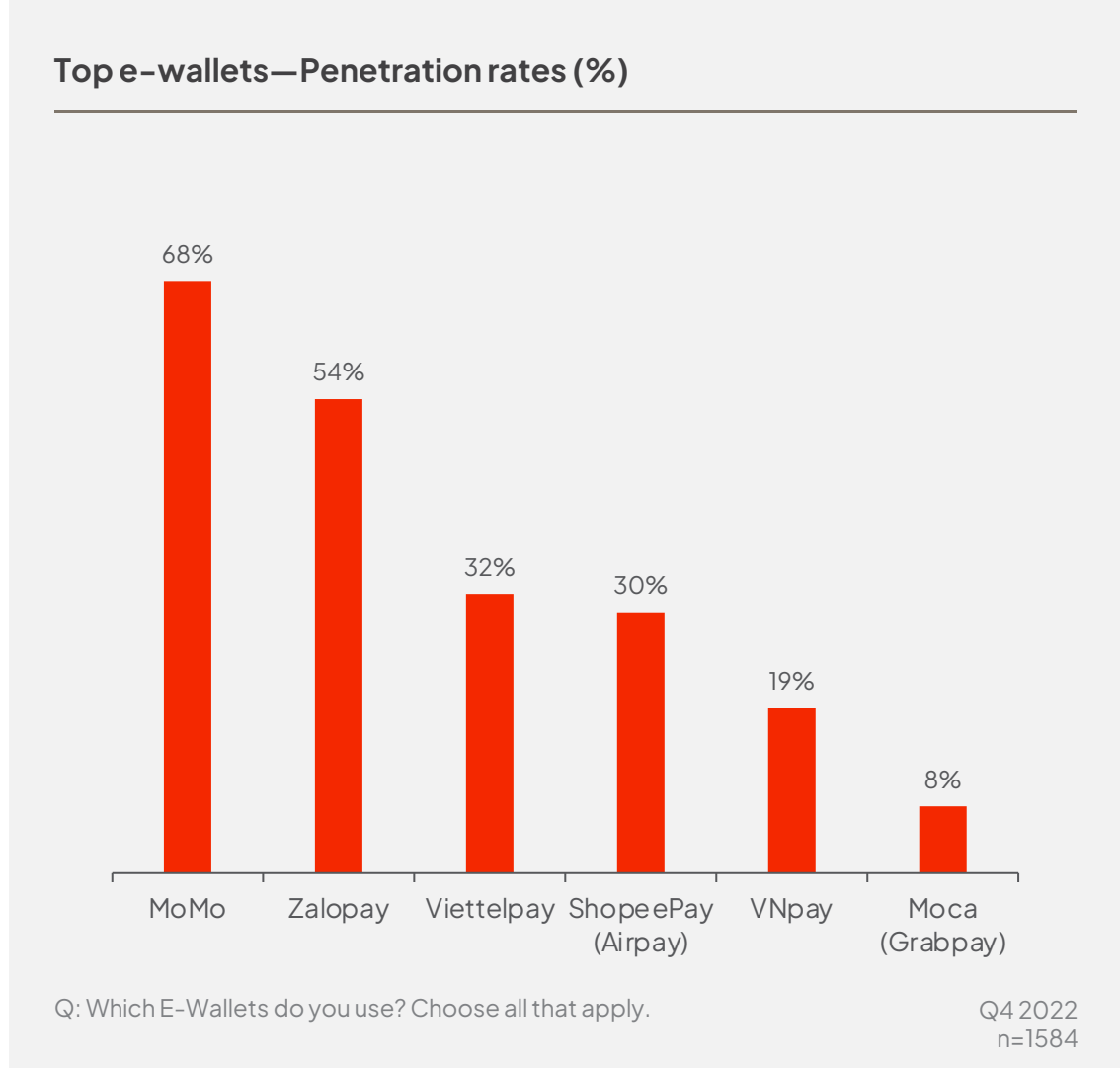
Q: Which food delivery app do you use most often?

■ Q4 2022 ■ Q3 2022 ■ Q2 2022

Gen Z n=513; Gen Y n=636; Gen X n=435

E-wallet

Momo and ZaloPay are the top 2 most used e-wallets overall.



Momo leads the market in terms of brand used most often, far outstripping the second-favorite ZaloPay

MoMo

Q4 2022

46%

ZaloPay

Q4 2022

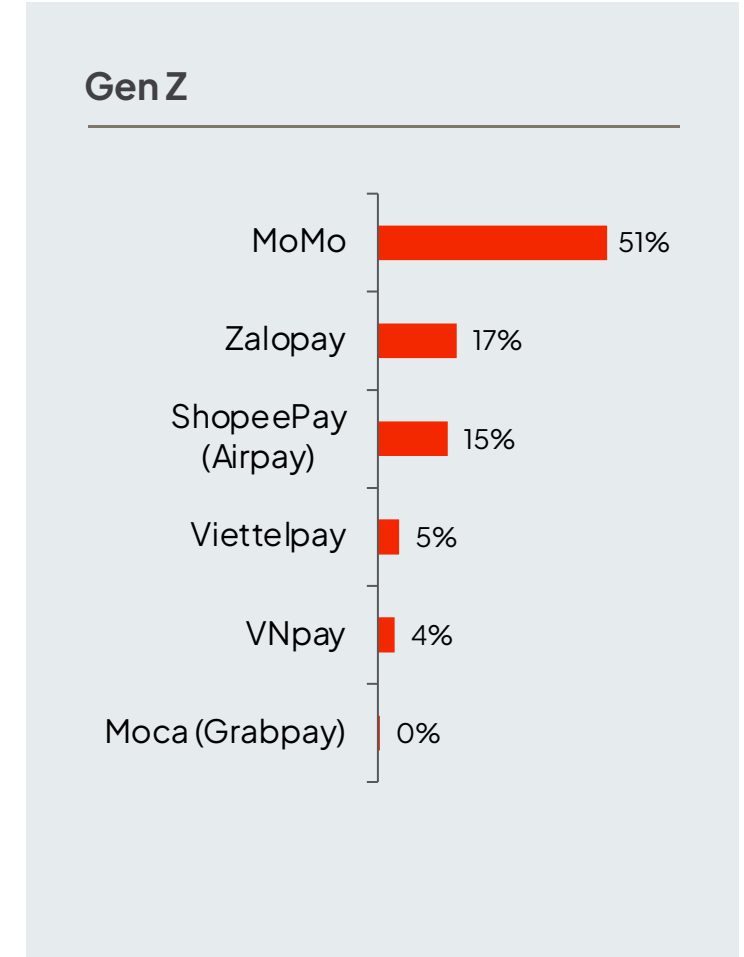
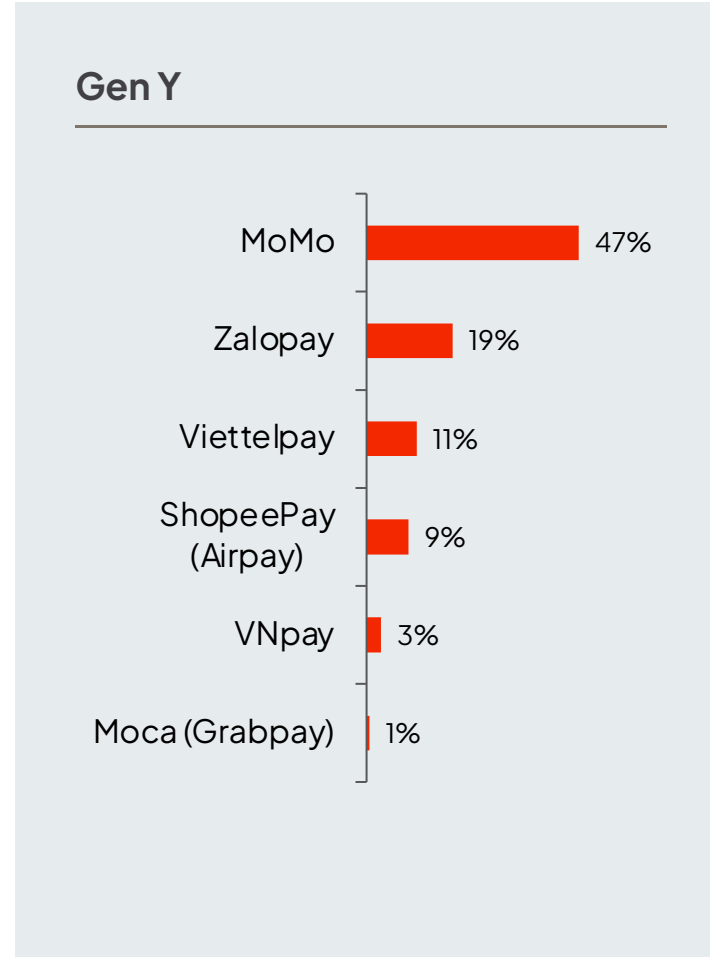
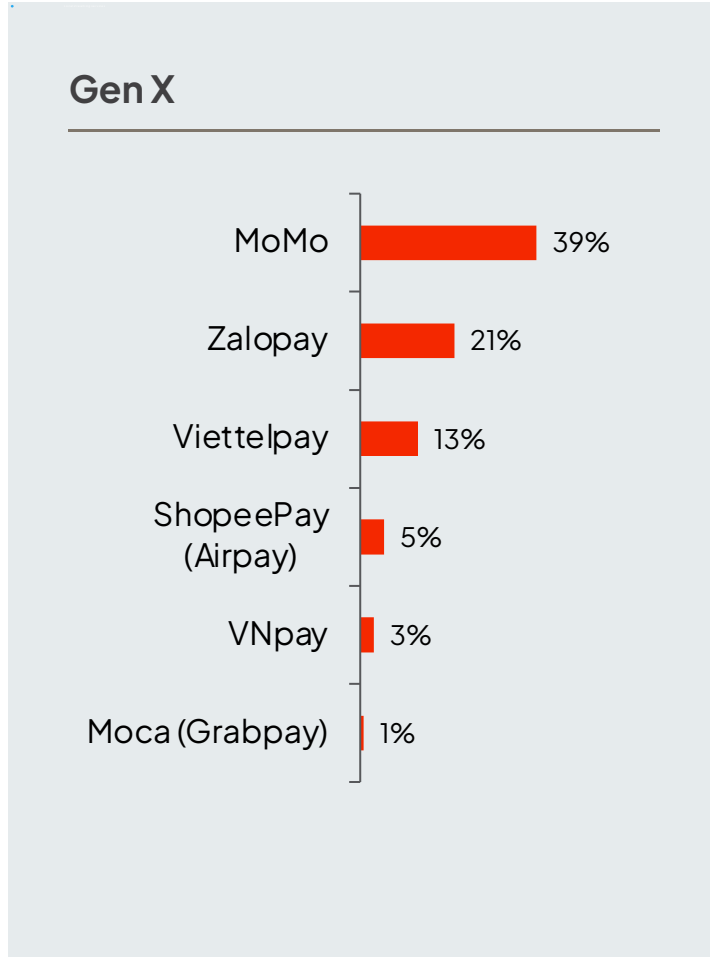
19%

ShopeePay

Q4 2022

10%

Though ViettelPay is among the top 3 used most often brands for Gen X and Y, Gen Z users prefer ShopeePay more



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

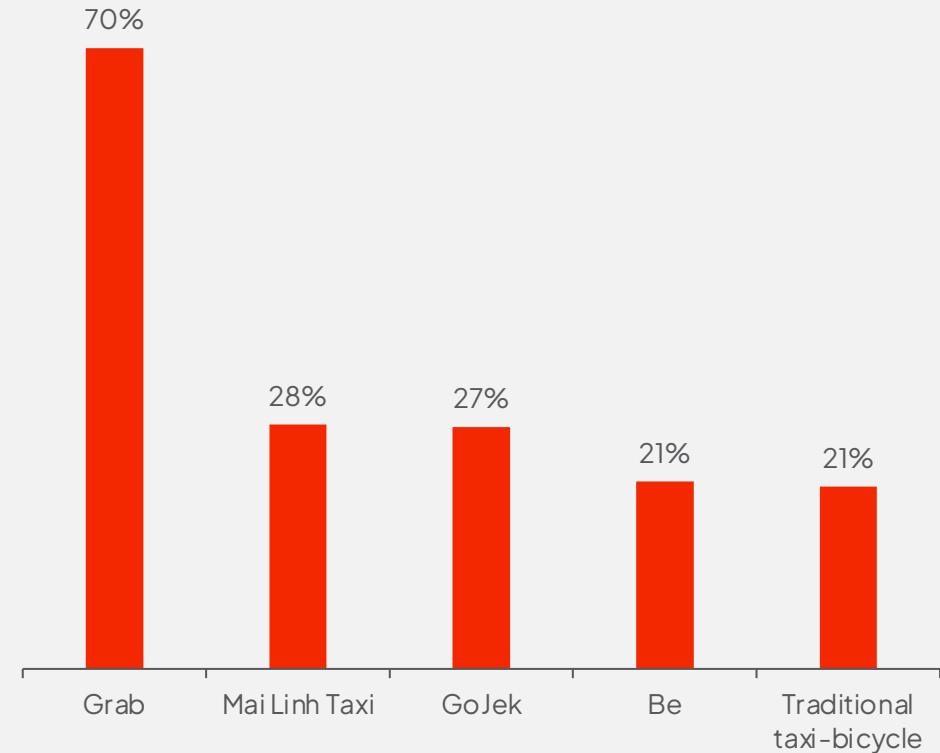
■ Q4 2022

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

Ride hailing

Grab dominates more than one-third of the ride-hailing market in Vietnam.

Top ride-hailing—Penetration rates (%)



Q: Which apps do you use for ride-hailing? Choose all that apply.

Q4 2022
n=1584

Naturally, Grab is the most preferred app for ride-hailing. Mai Linh Taxi enjoy slightly more favorability from consumers over GoJek

Grab

Q4 2022

53%

Mai Linh

Q4 2022

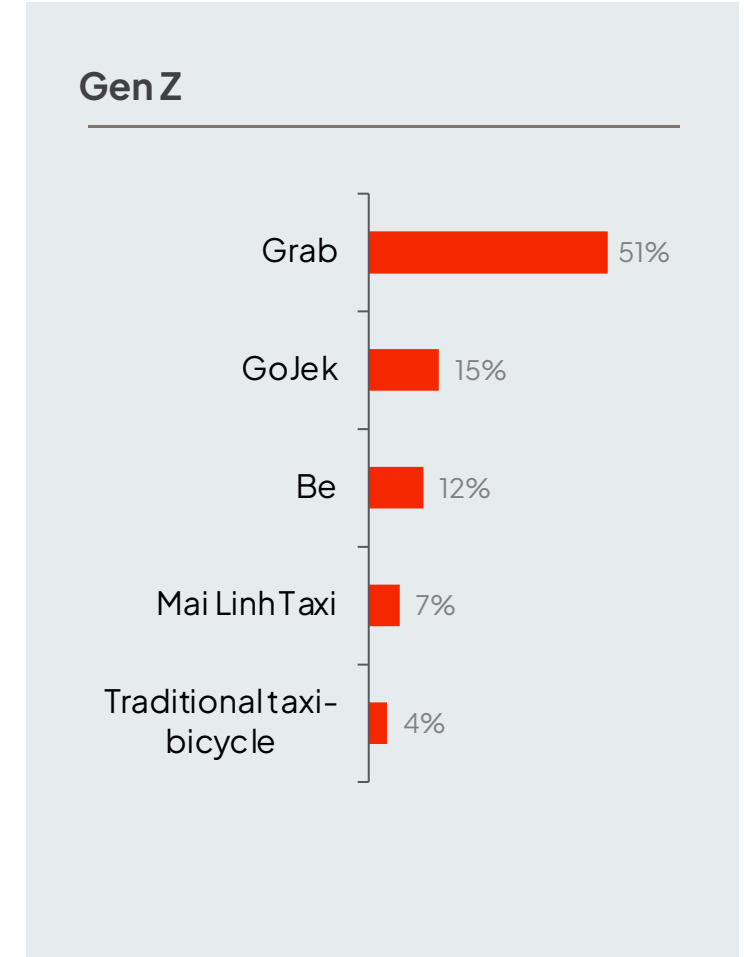
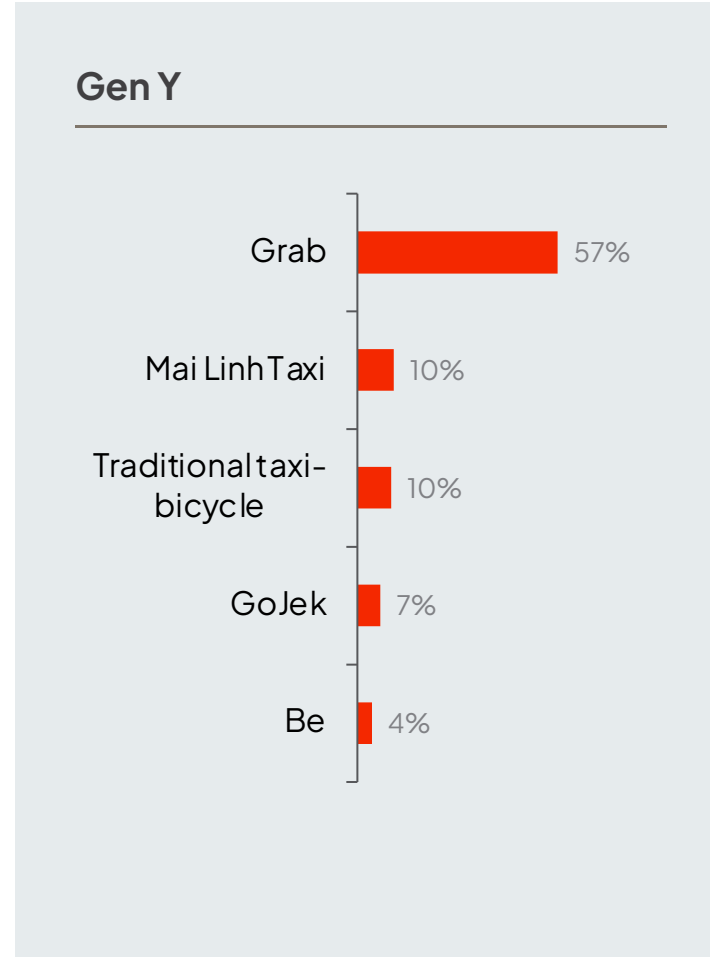
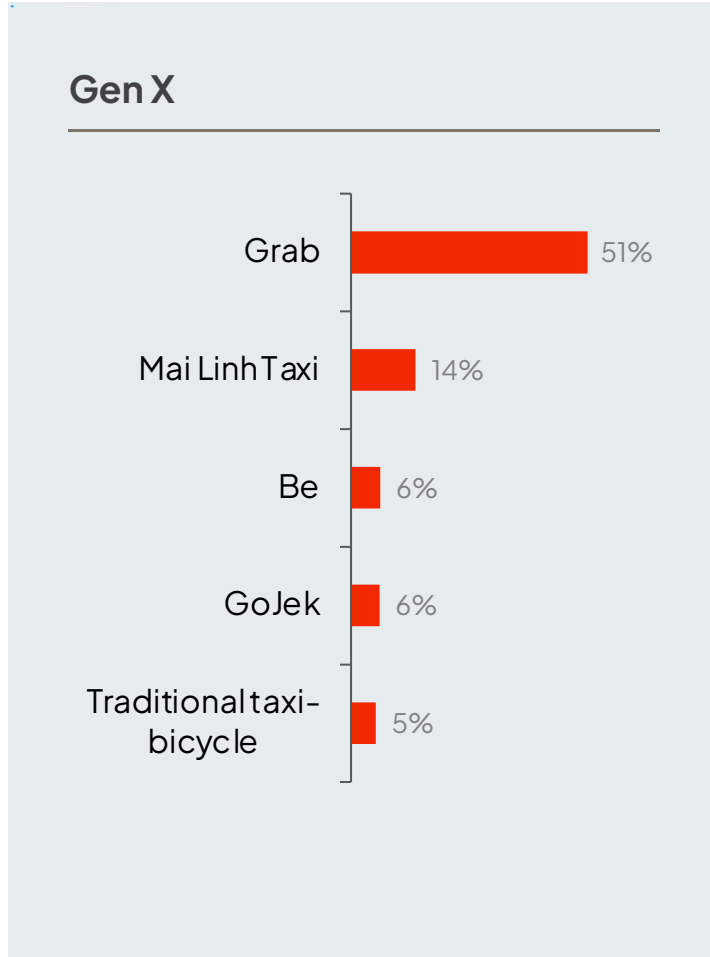
10%

GoJek

Q4 2022

9%

Mai Linh Taxi wins over GoJek for the Gen X and Gen Y groups



Q: Which ride-hailing app do you use most often?

■ Q4 2022

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

Unlock the potential of our data

Decision Lab is here to help you
uncover insights and **improve growth**.

What is the competitive
landscape in the market?

Who are the consumers,
and what are their
behaviors?

What else do consumers
expect & what are their
unmet needs?

How does the consumer
journey look like?

Reach out to us



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