

The Connected Consumer Q1 2023

# The Rise of Shoppertainment



PREPARED BY DECISION LAB

MAY 2023



# Content



Introduction

Overview

- Tracing the connected consumers

- The connected consumers' profile

Platforms by functions

Key findings & what it means for advertisers

Our solutions

Contact us





# Introduction



# Background

The Connected Consumer is a quarterly report conducted by Decision Lab since 2019. The study aims to provide the latest updates about Vietnamese digital consumption to support brands connect with consumers most effectively. Information in the report is analyzed by Decision Lab's expert consultants and focuses on consumers' online habits, including social media usage, entertainment (music, movies, online videos), and online shopping.

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.

# Key highlights

## 1.

**TikTok's** dominance in the short videos category continued to be challenged in Q1 2023. Meanwhile, **Reels** and **Shorts** maintain a similar usage level from the previous quarter. **Instagram**, too, is getting more recognised as a platform for short videos.

## 2.

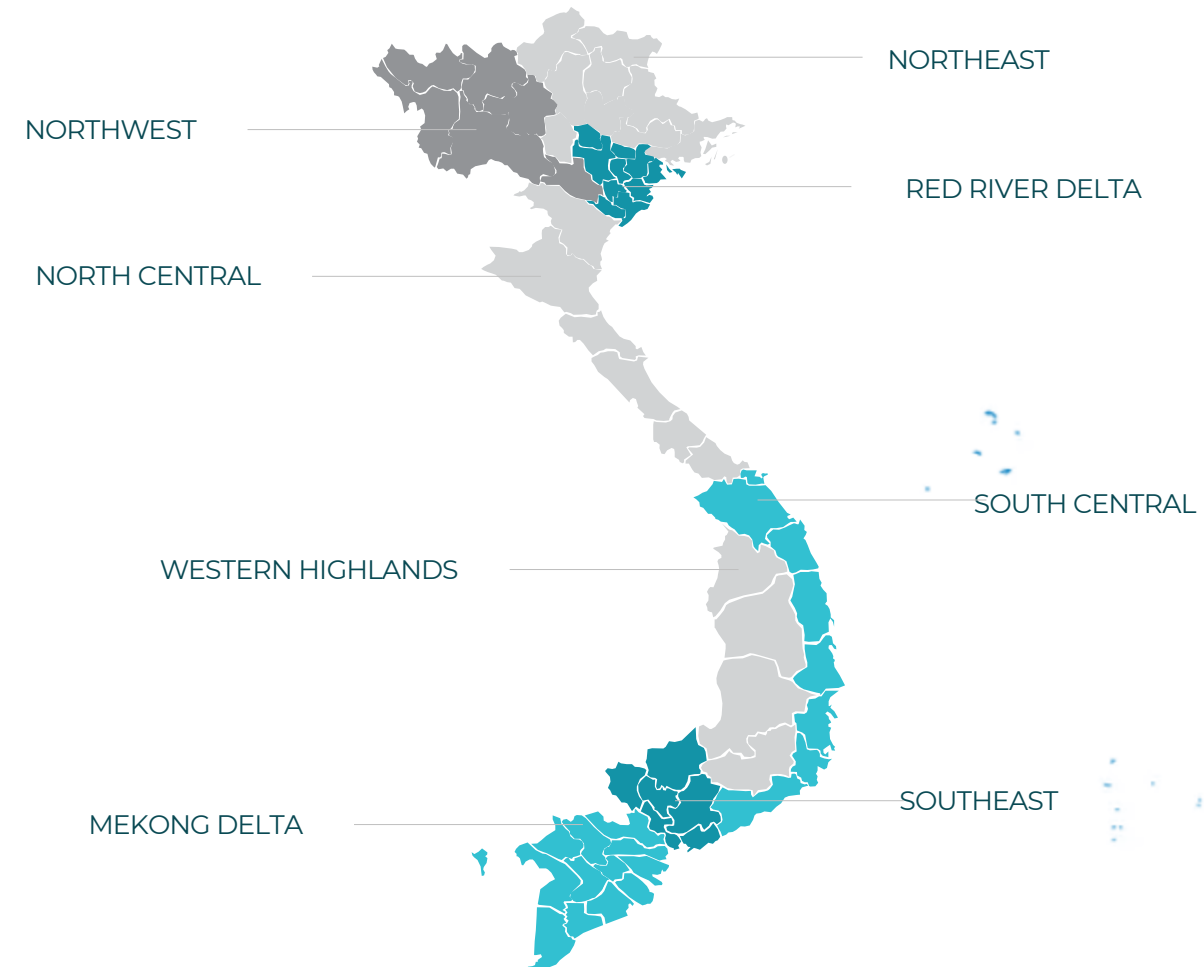
Despite TikTok's slight drop in usage in Q1 2023, that of **TikTok Shop** rose fast. This signals the development of **shoppertainment** in Vietnam, where e-commerce activities occur on entertainment platforms.

## 3.

Usage and preference within the **food delivery** and **e-wallet** categories were concentrated on leading incumbents (**Grab & MoMo**). This poses challenges to other apps, especially **Shopee**, which saw declines in usage & preference across tracked categories.

# Online quantitative survey using online panel

QUARTER	SAMPLE COLLECTION PERIOD	TOTAL SAMPLE SIZE
Q1 2023	Jan 2023 – Mar 2023	1741
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

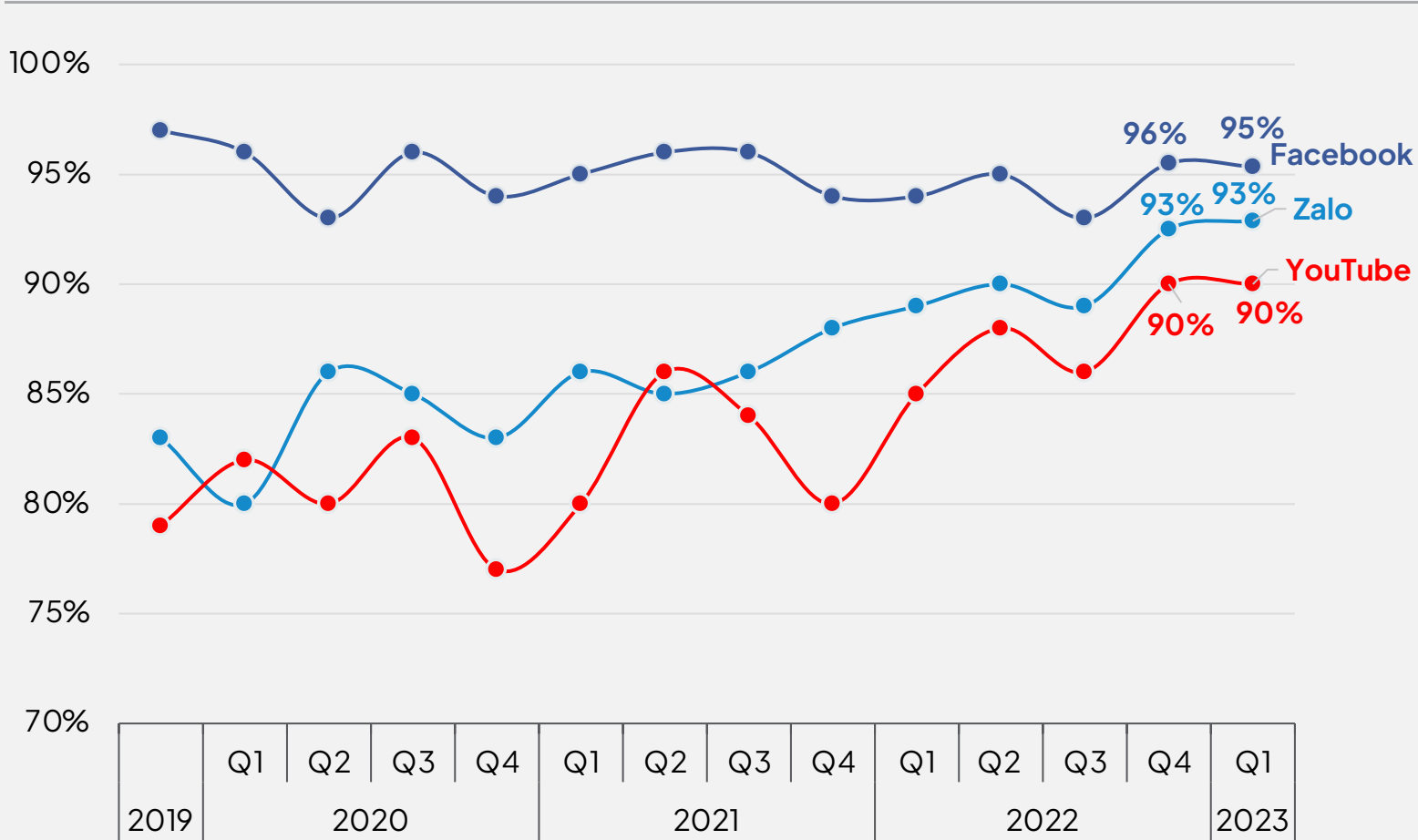
AGE 42 – 62

# Social Media Platforms





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



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

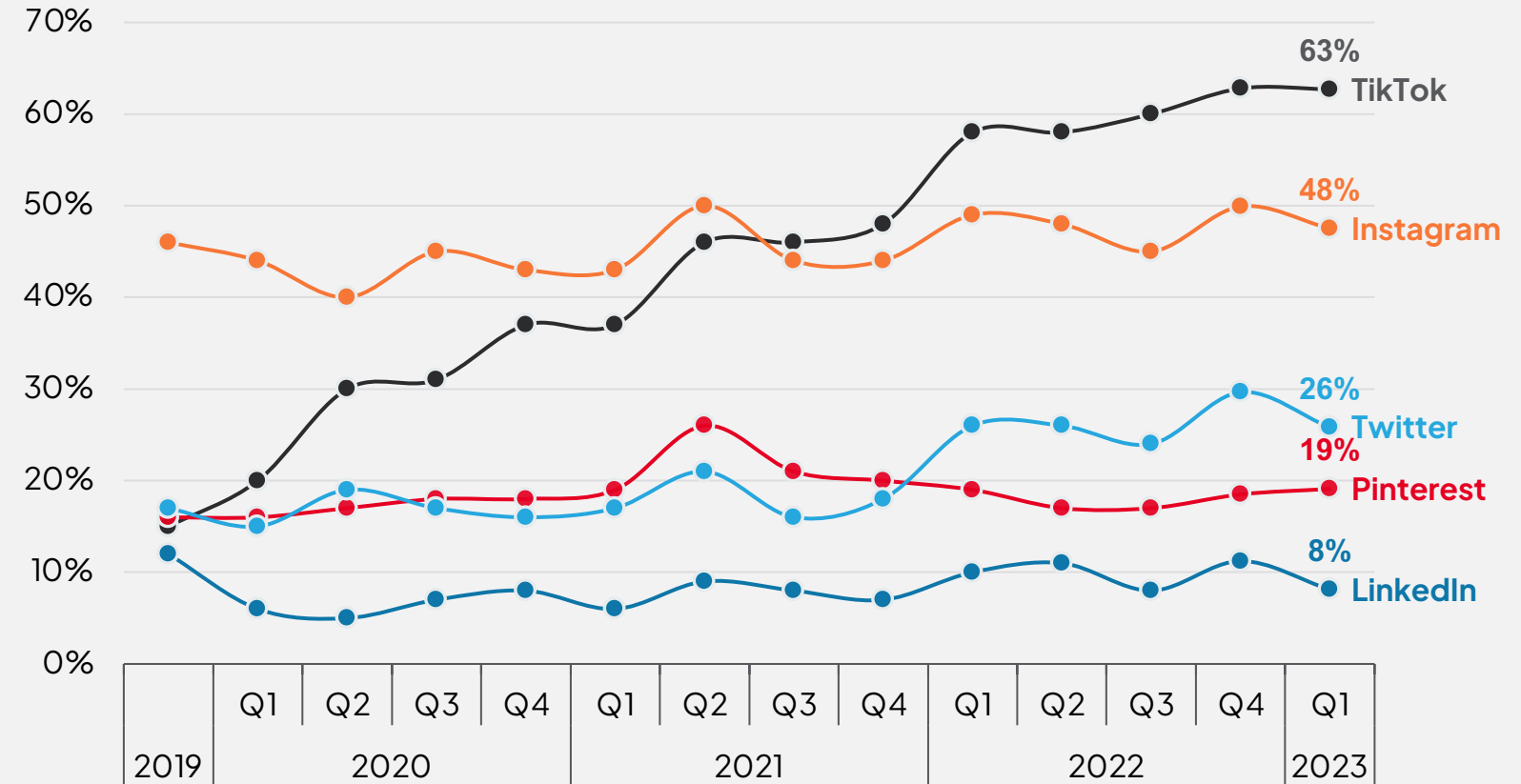
Q1 2023 n=1741

**Top social media platforms maintained the previous quarter's usage rates.**

# Instagram saw a slight decrease in usage in Q1 2023.

Twitter and LinkedIn were the other two platforms with lower usage in Q1 2023.

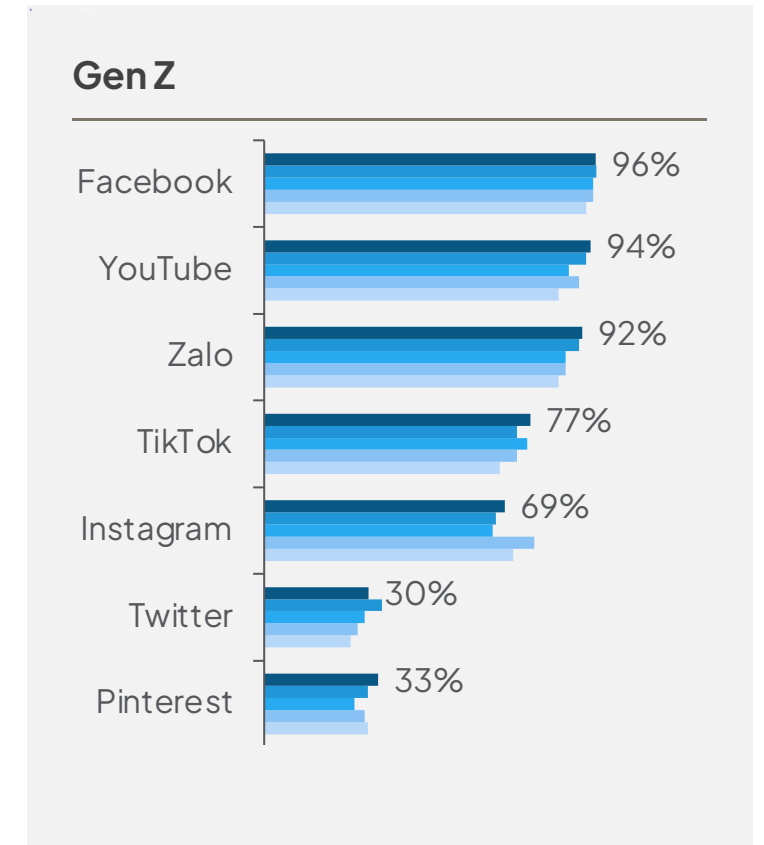
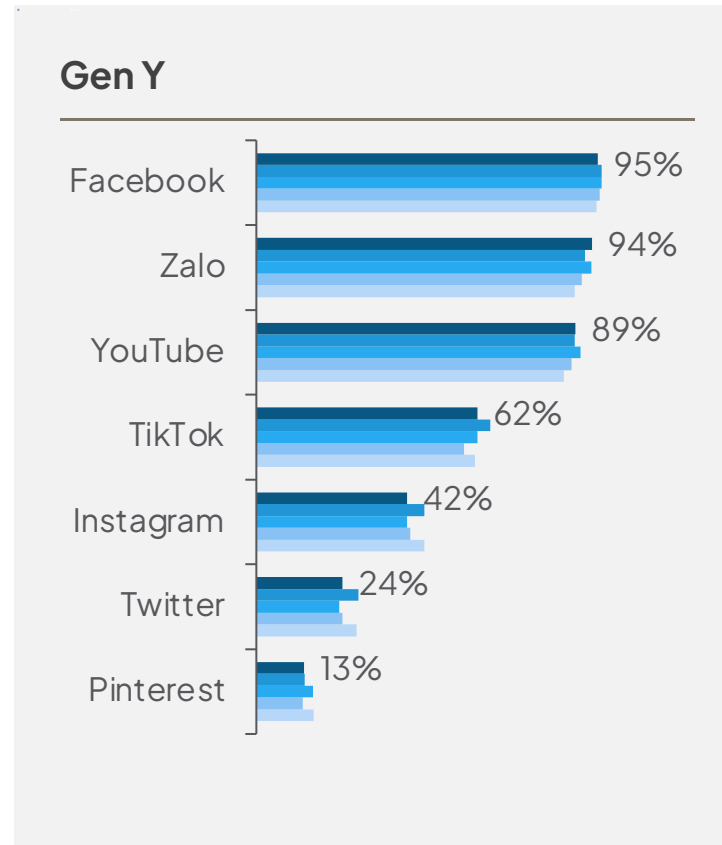
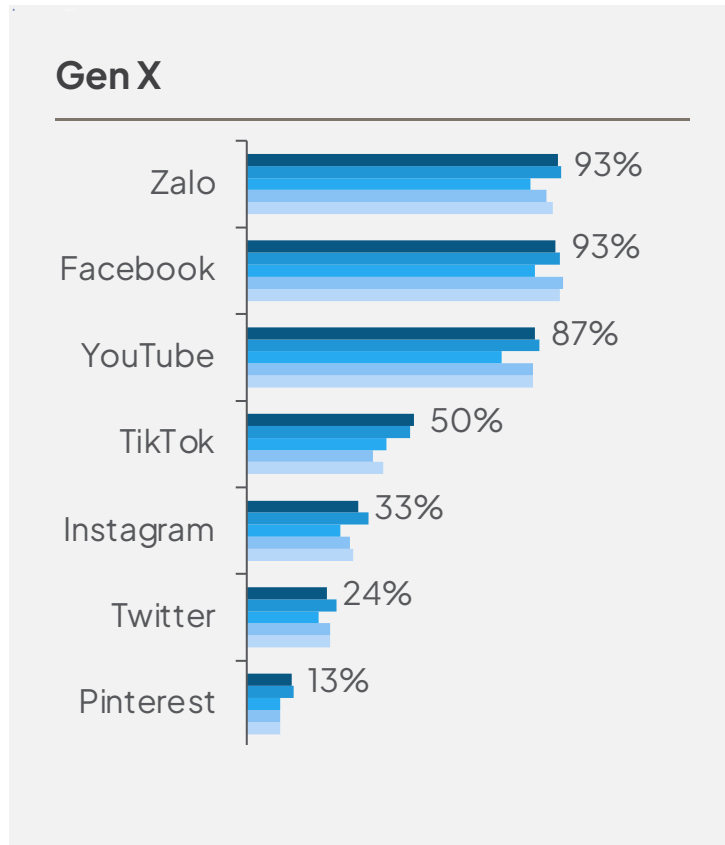
Top social media platforms—Penetration rates (%)



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

Q1 2023 n=1741

# The decline in Instagram usage only occurred among Gen X & Gen Y.

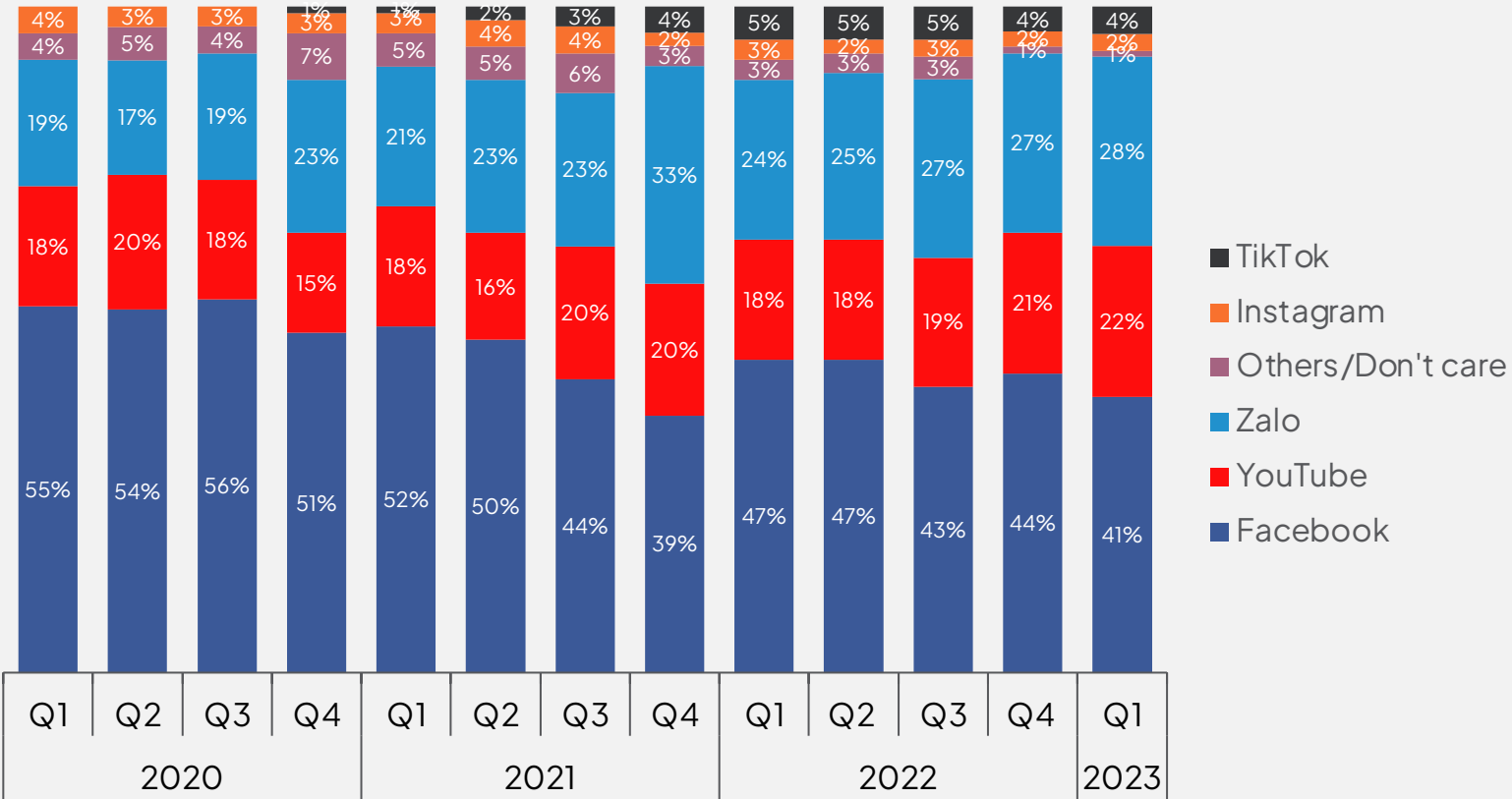


Q: Which of the following social media platforms are you using?  
(Choose all that apply)

■ Q1 2023 ■ Q4 2022 ■ Q3 2022 ■ Q2 2022 ■ Q1 2021

Gen Z n=612; Gen Y n=692; Gen X n=420

### Consumers' Primary Applications

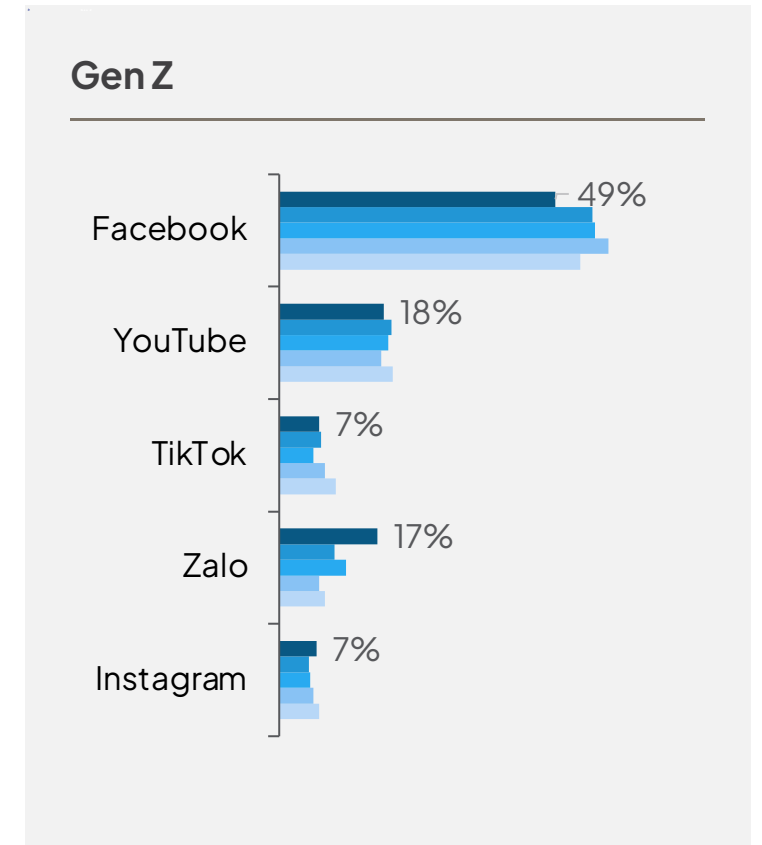
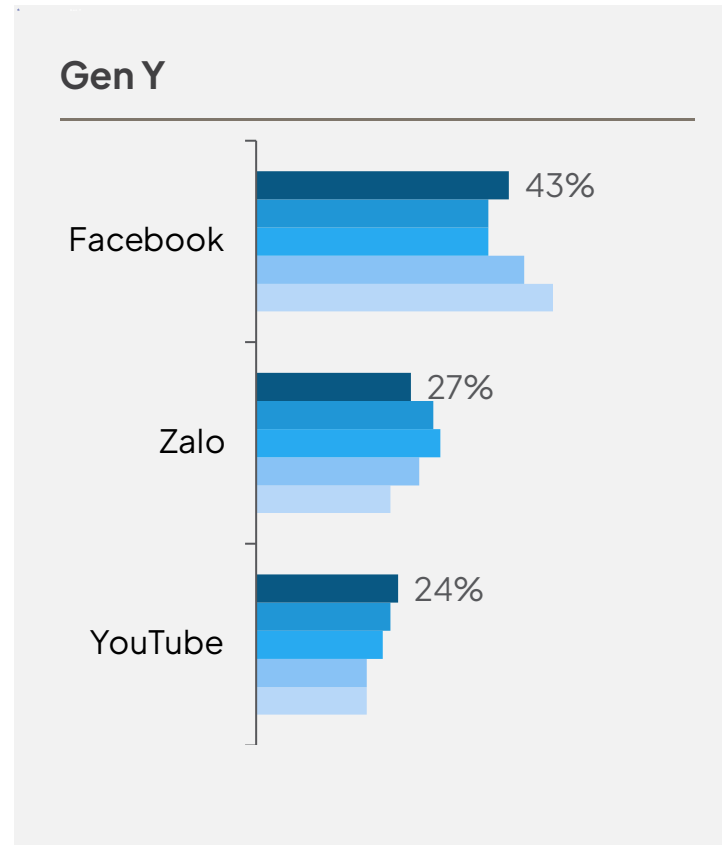
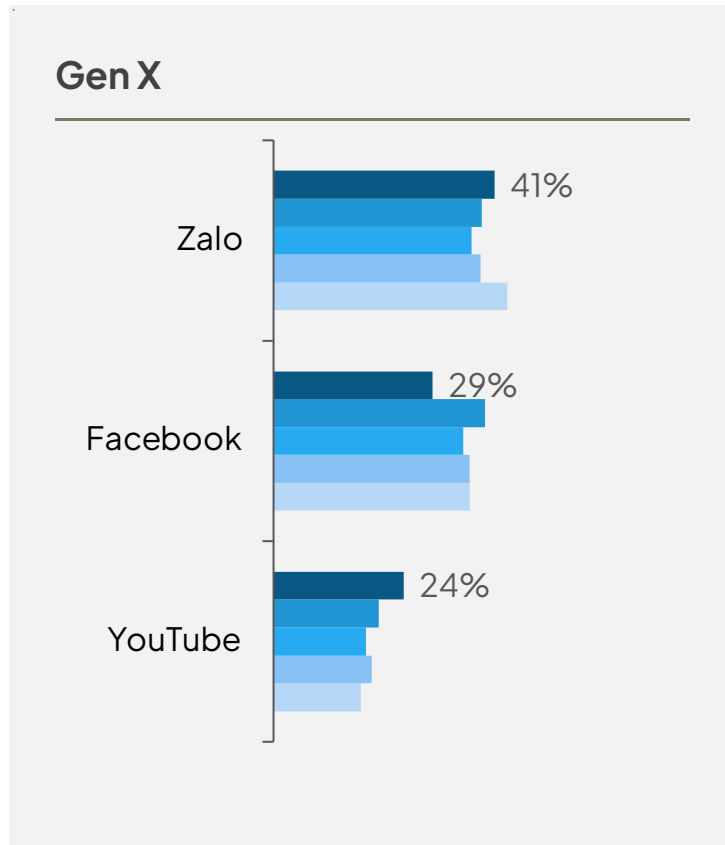


Q: What is your one primary app?

Q1 2023 n = 1334

**Facebook's primacy contracted by three percentage points (pp).**

# Gen X and Gen Z saw Facebook as less of a primary app in Q1 2023. Among Gen Z, Zalo's importance increased sharply by 6pp.



Q: What is your one primary app?

■ Q1 2023 ■ Q4 2022 ■ Q3 2022 ■ Q2 2022 ■ Q1 2021

Gen Z n=491; Gen Y n=530; Gen X n=313

Messages

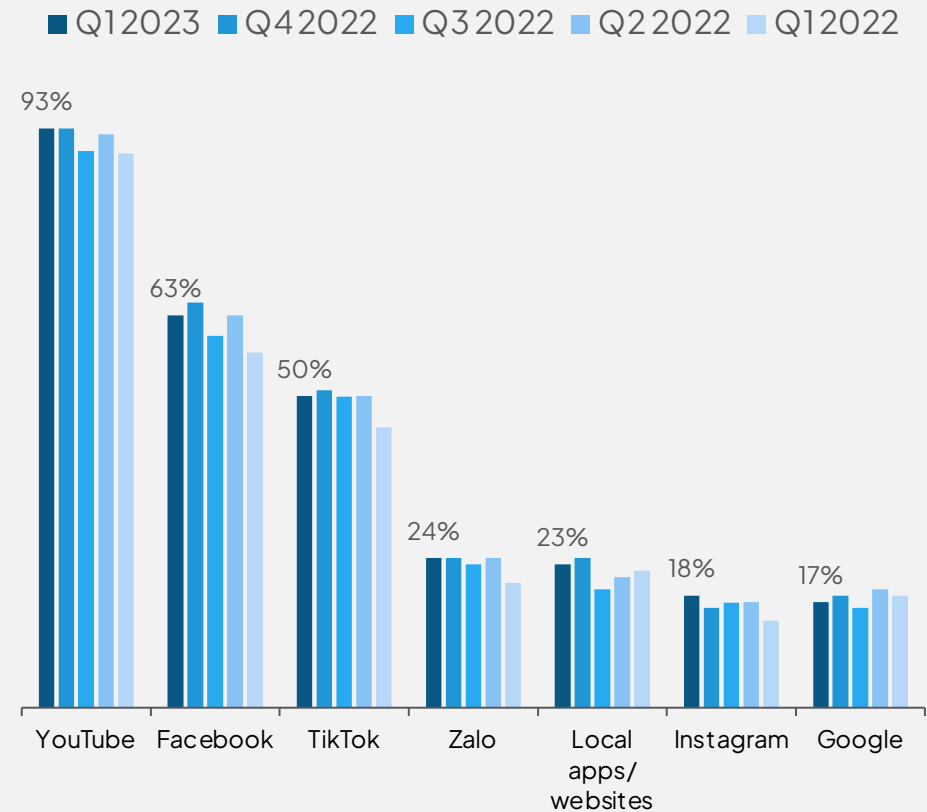
# Platforms by Category



# Entertainment Videos

Facebook and TikTok’s growth as platforms for entertainment videos took a small hit in Q1 2023.

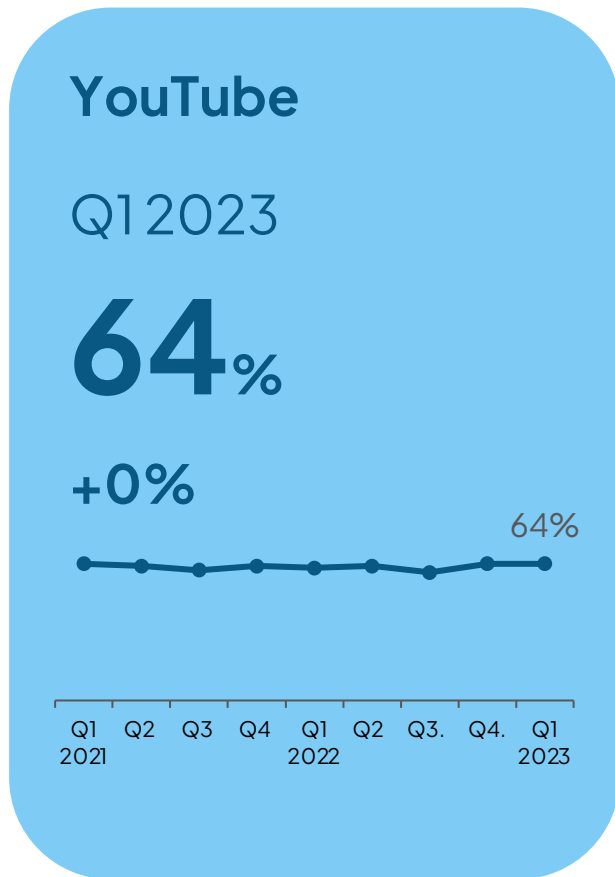
Top platforms for entertainment videos—Penetration rates (%)



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

Q1 2023 n=1741

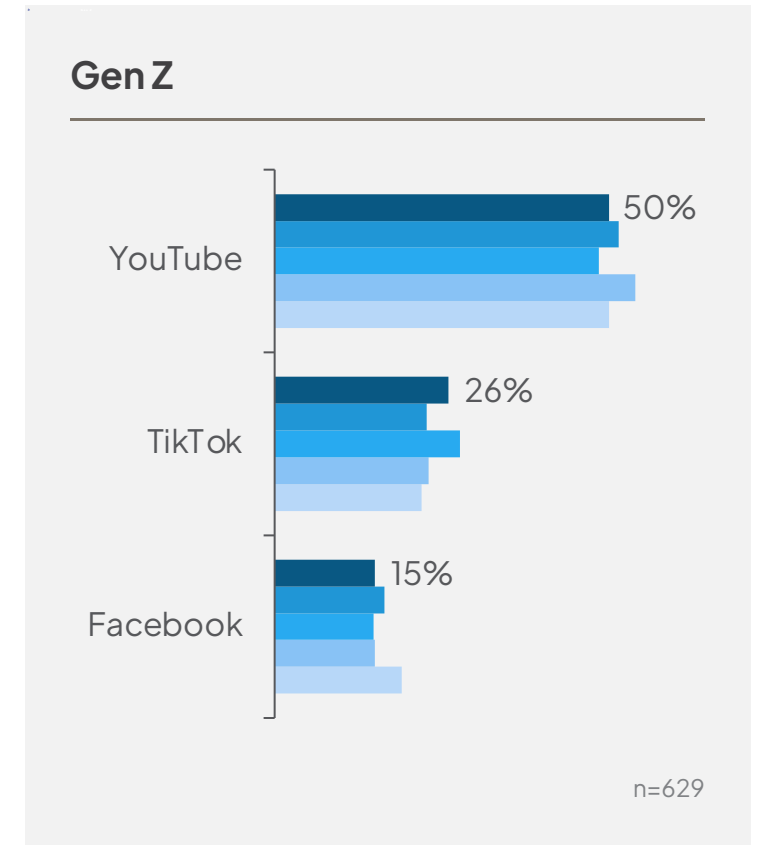
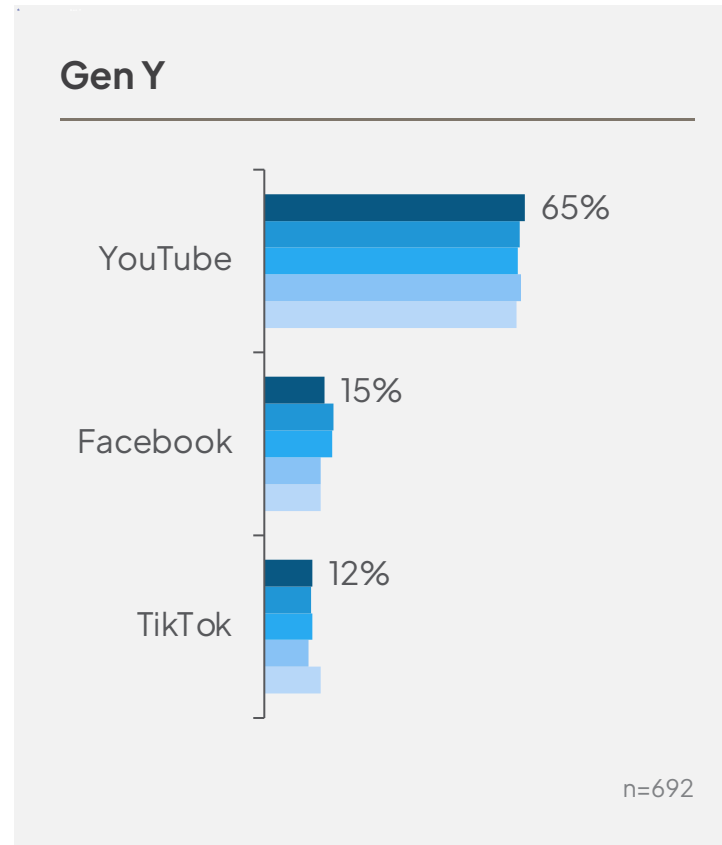
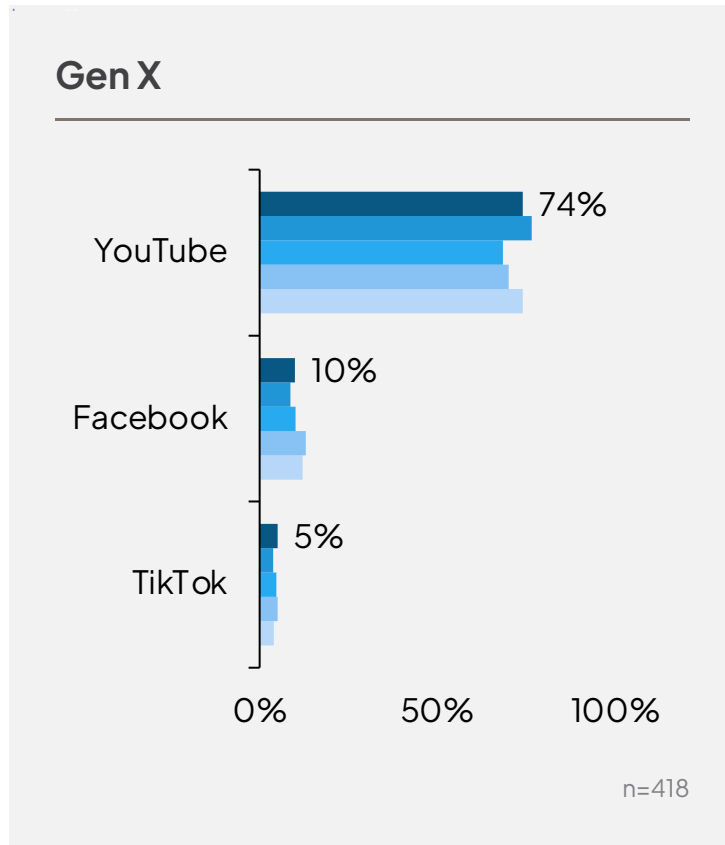
# YouTube remained the go-to platform for entertainment videos.



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



# That said, among Gen Z, preference for TikTok as a platform for entertainment video rebounded.



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

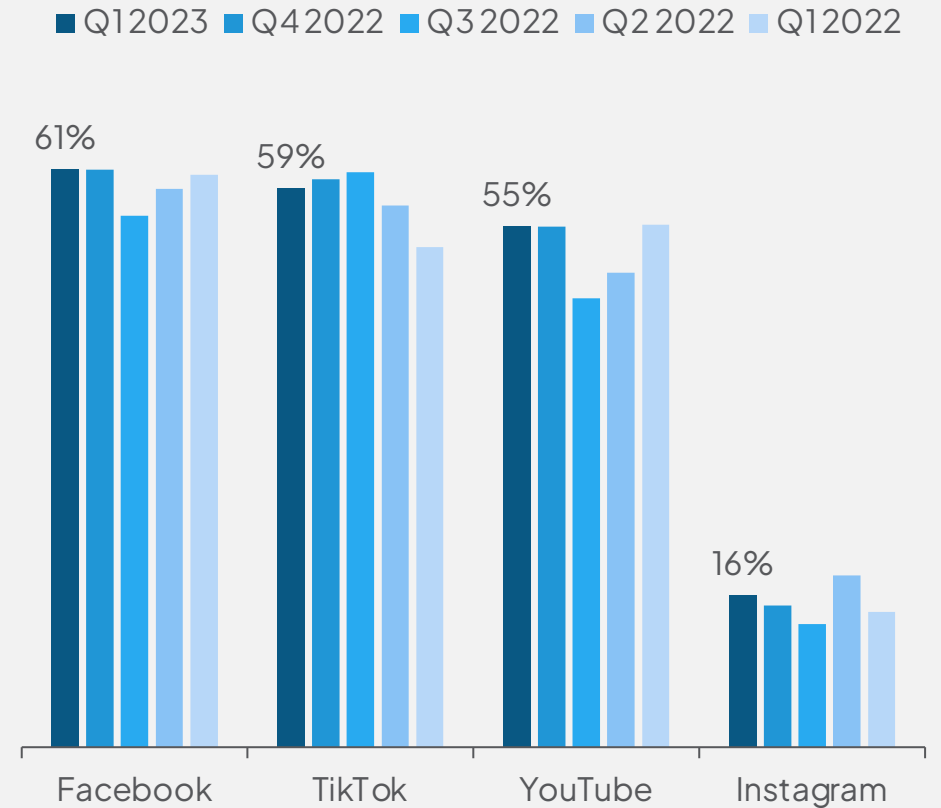
■ Q1 2023 ■ Q4 2022 ■ Q3 2022 ■ Q2 2022 ■ Q1 2021

Gen Z n=629; Gen Y n=692; Gen X n=418

# Short Videos

TikTok’s penetration rates dropped for the second quarter in a row.

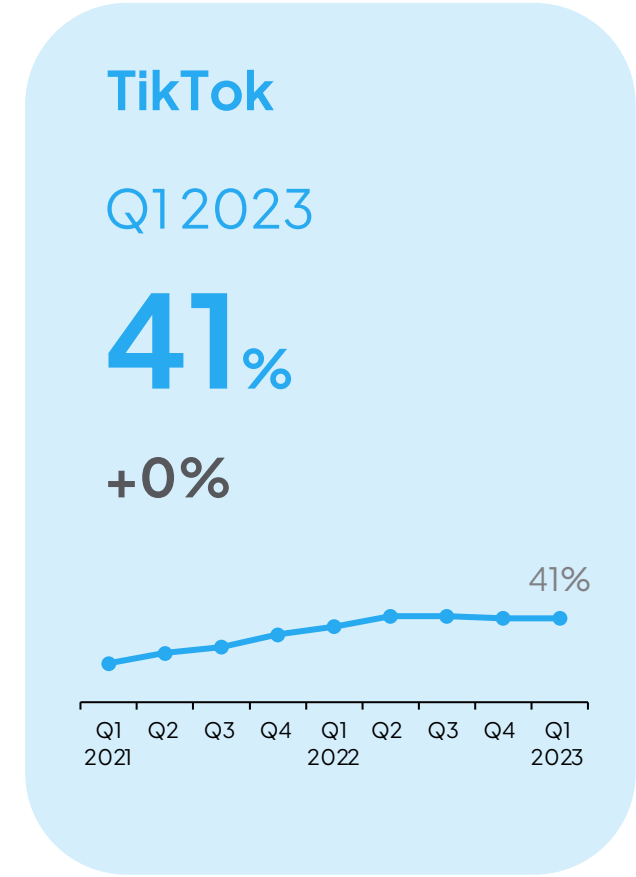
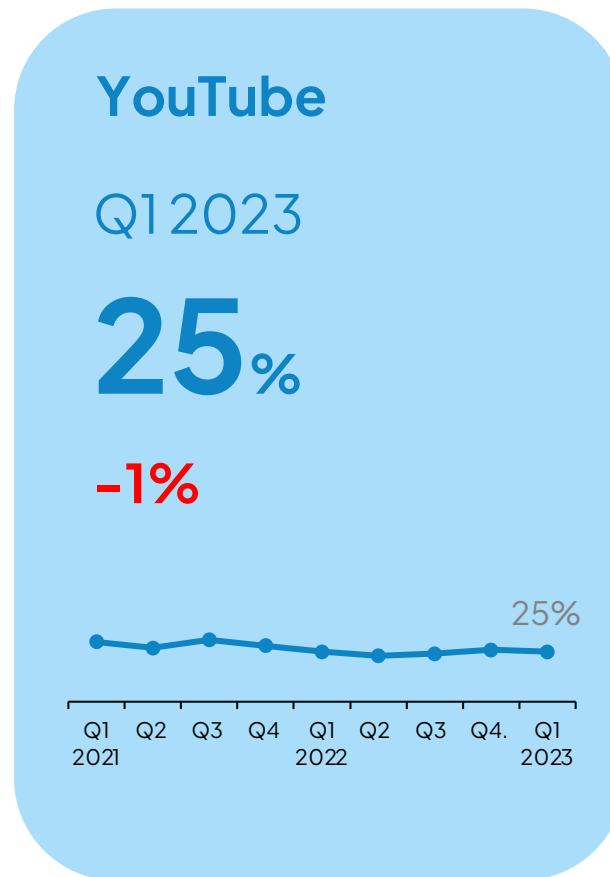
Top platforms for short videos—Penetration rates (%)



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

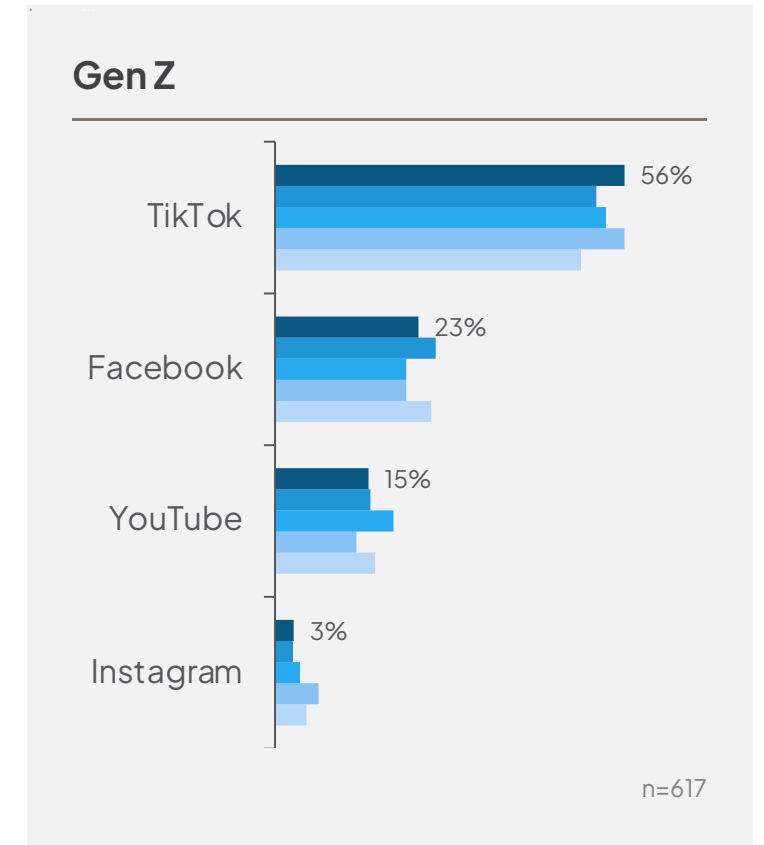
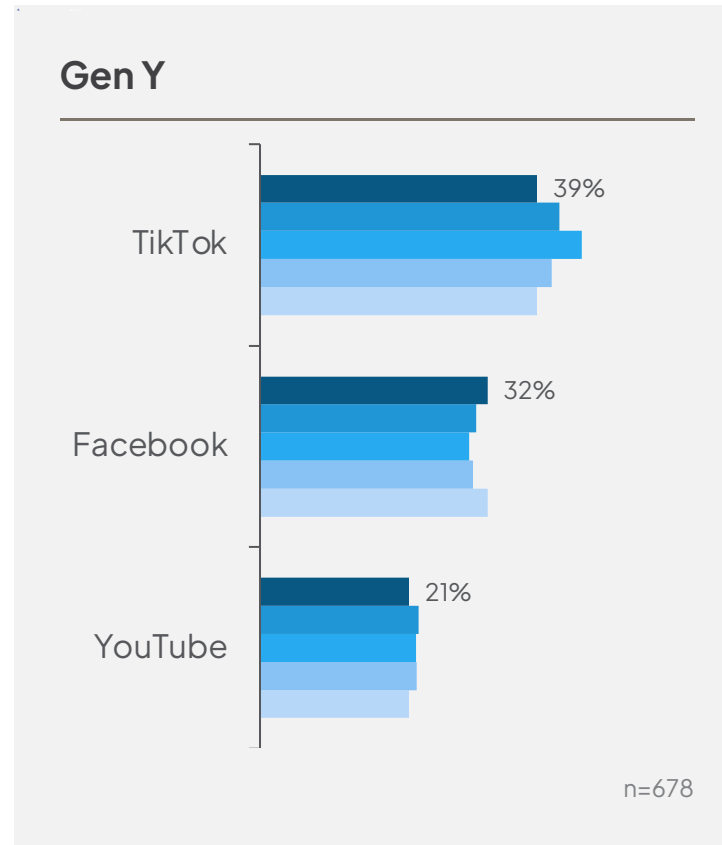
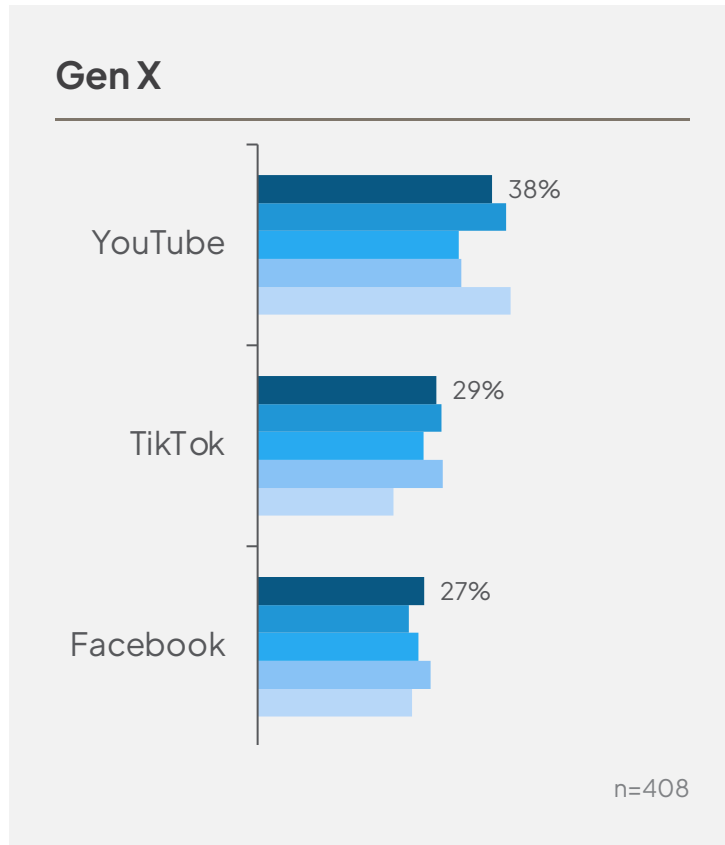
Q1 2023 n=1741

# Yet, preference for TikTok remains unchanged. Preference for Facebook Reels gained a slight bump of 1pp.



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

# Preference for Facebook Reels was on an upward trajectory for Gen X & Y. Among Gen Z, favorability for TikTok improved to Q2 2022 level.



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

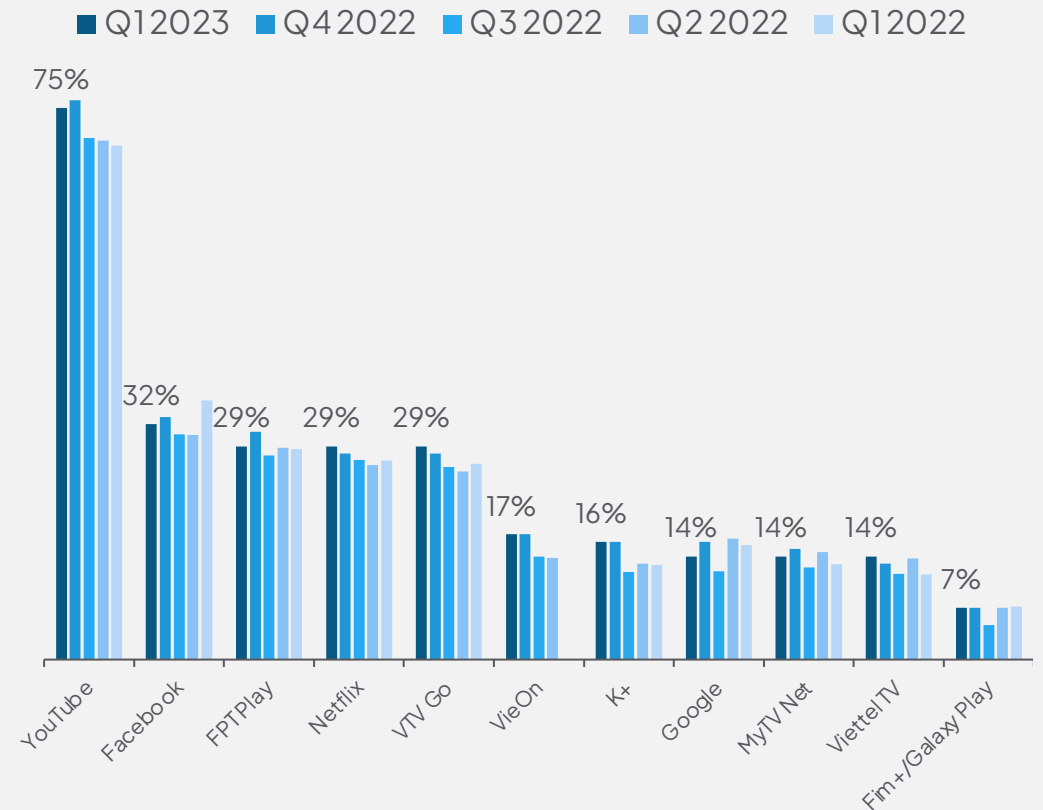
■ Q1 2023 ■ Q4 2022 ■ Q3 2022 ■ Q2 2022 ■ Q1 2021

Gen Z n=617; Gen Y n=678; Gen X n=408

# Movie Streaming

Netflix was on a steady rise in Q1 2023, matching the usage of FPT Play and VTV Go.

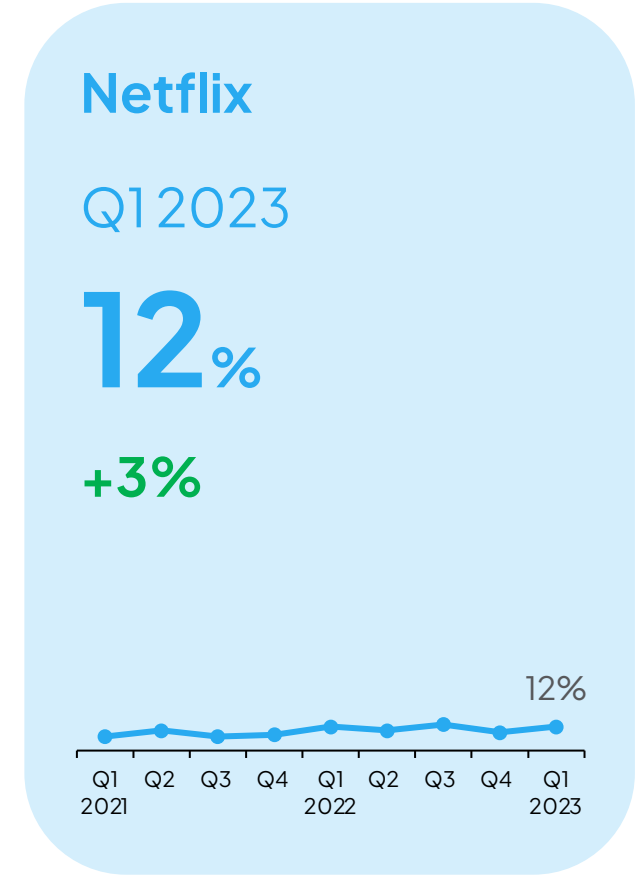
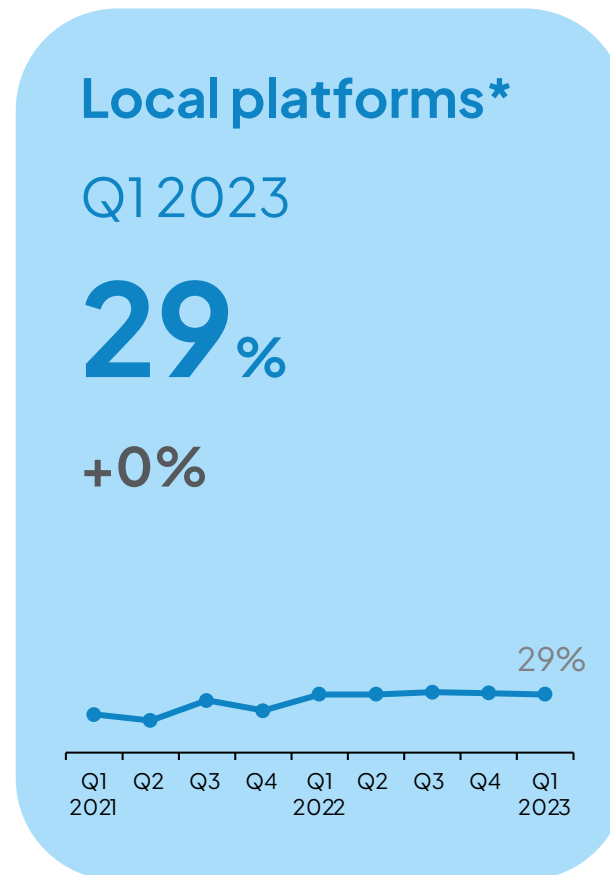
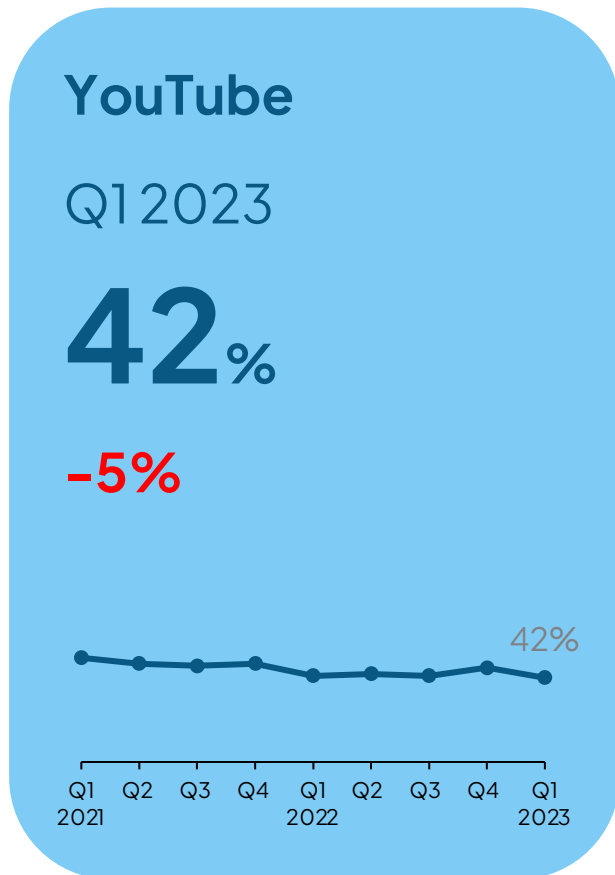
Top platforms for movies streaming—Penetration rates (%)



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

Q1 2023 n=1741

# Netflix garnered 3pp in consumer preferences, indicating the platform's growth in Vietnam.

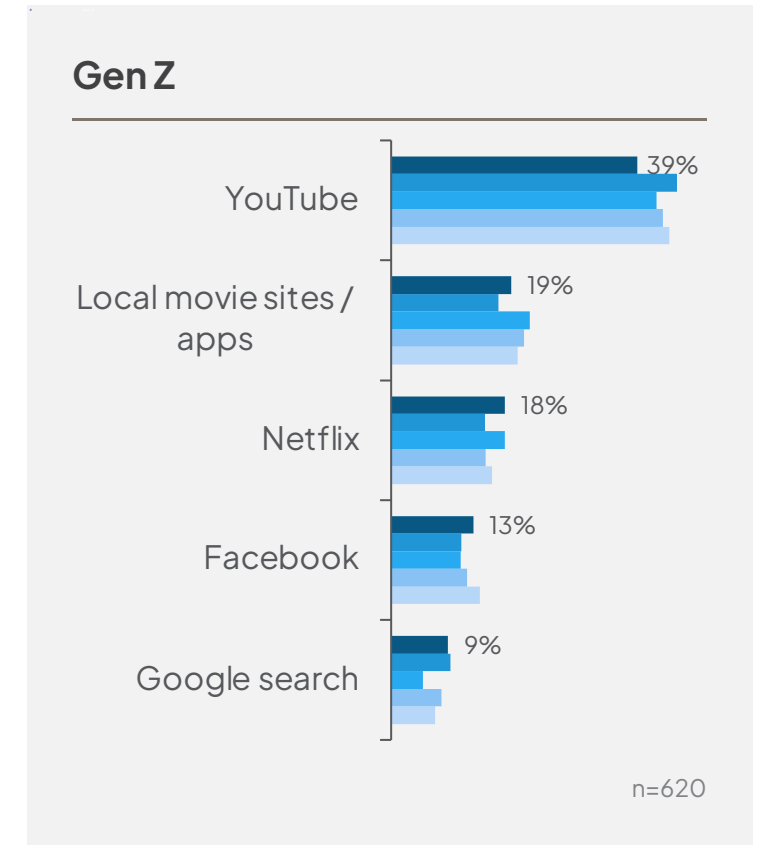
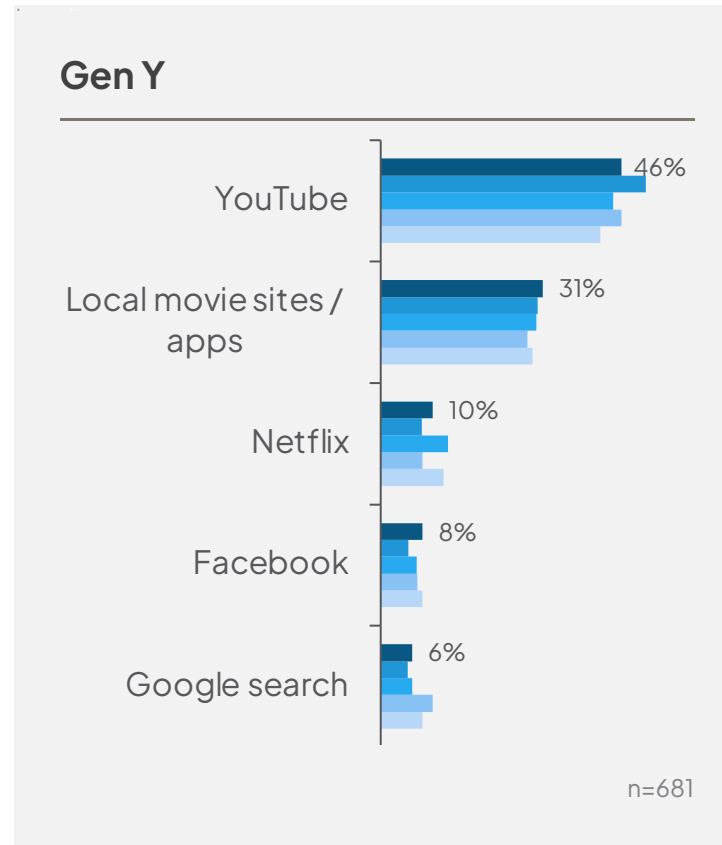
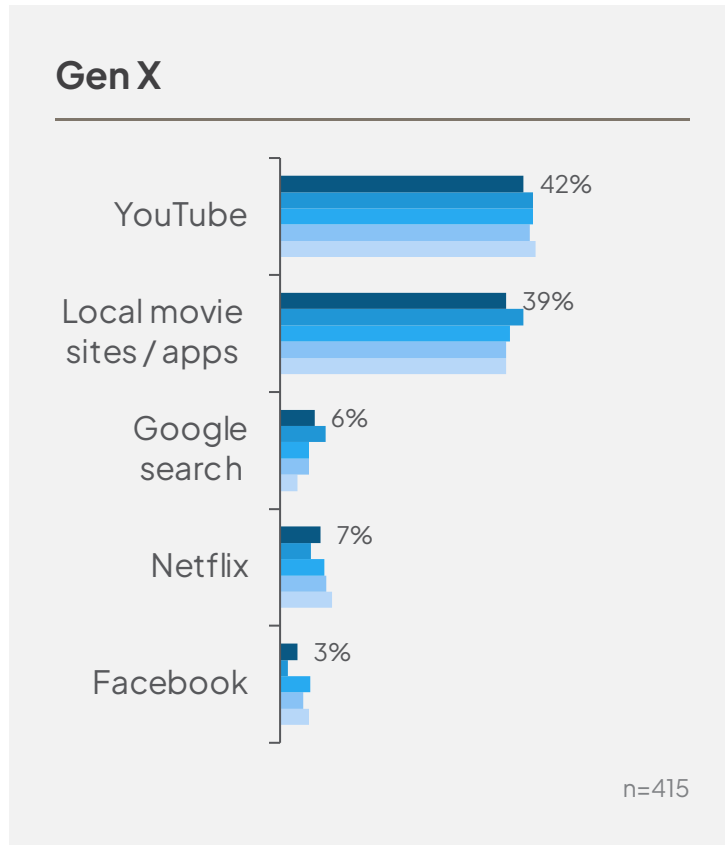


Q: Which of the following apps do you use most often to watch movies?

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

Q1 2023 n=1741

# Netflix's growth in consumer favorability can be seen across generations.



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

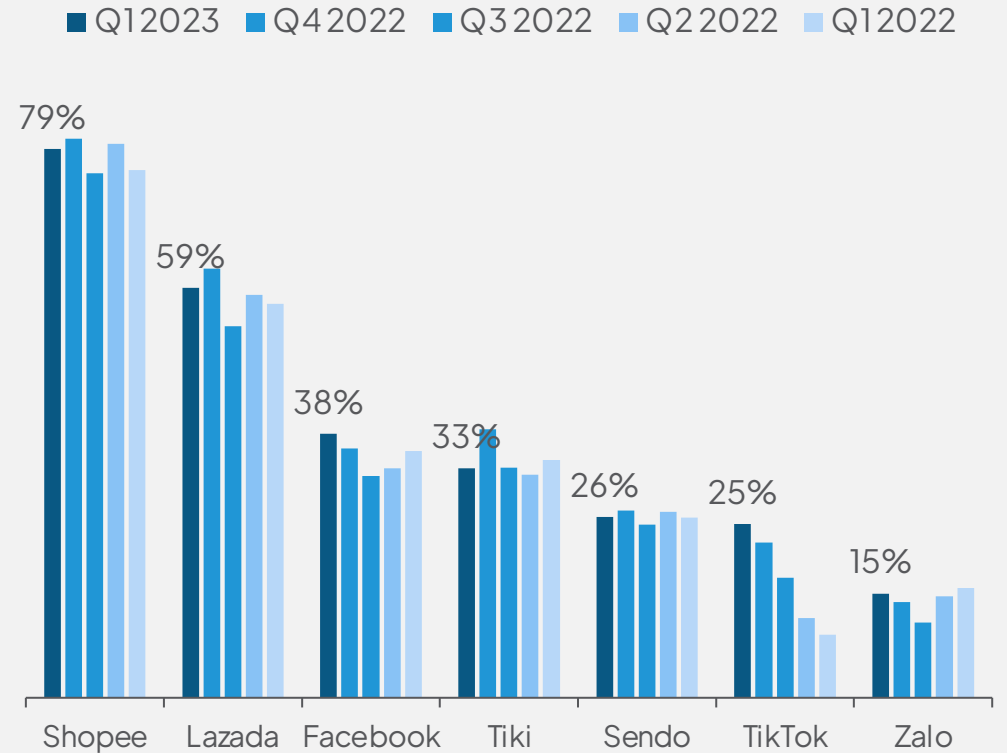
■ Q1 2023 ■ Q4 2022 ■ Q3 2022 ■ Q2 2022 ■ Q1 2021

Gen Z n=620; Gen Y n=681; Gen X n=415

# E-Commerce Platforms

Q1 2023 saw the continued rise of TikTok Shop, growing 5pp QoQ.

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

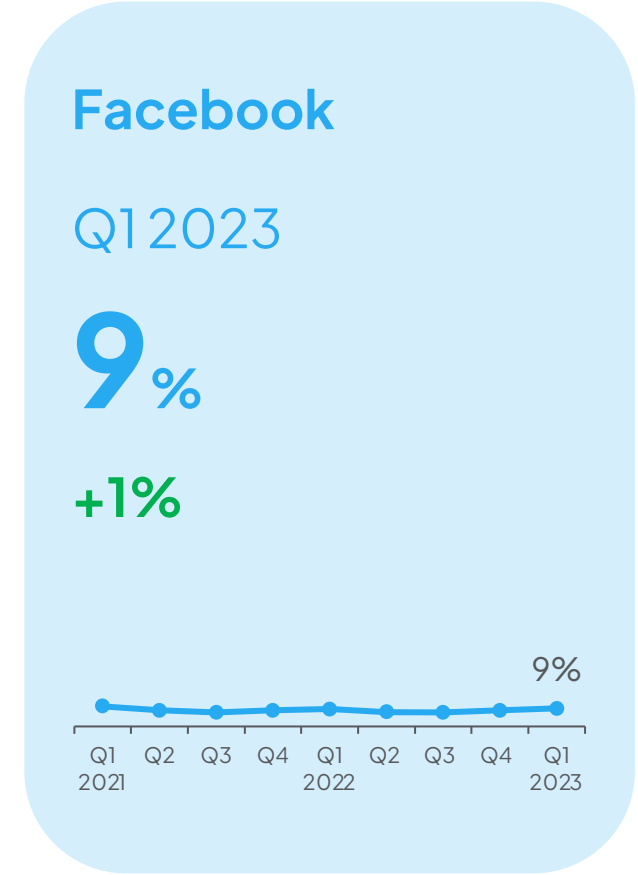
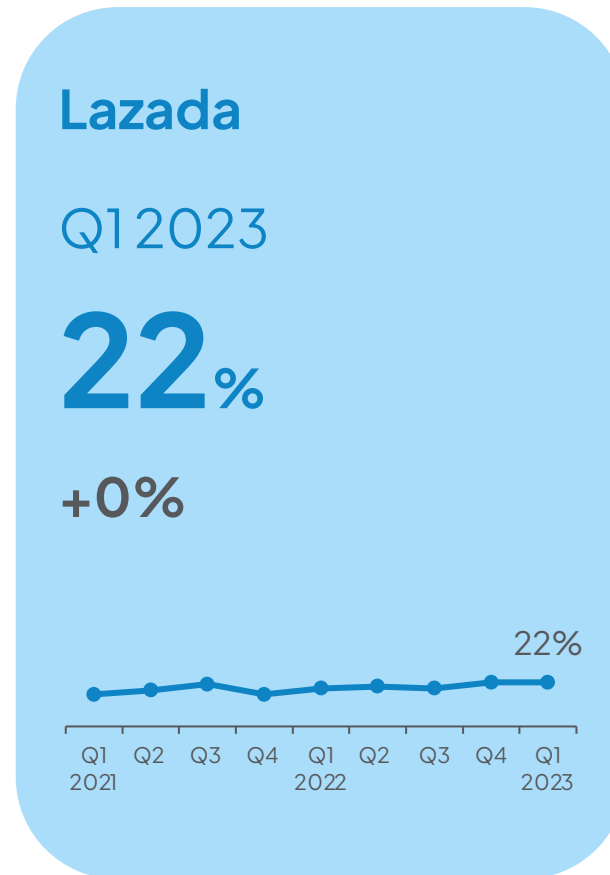
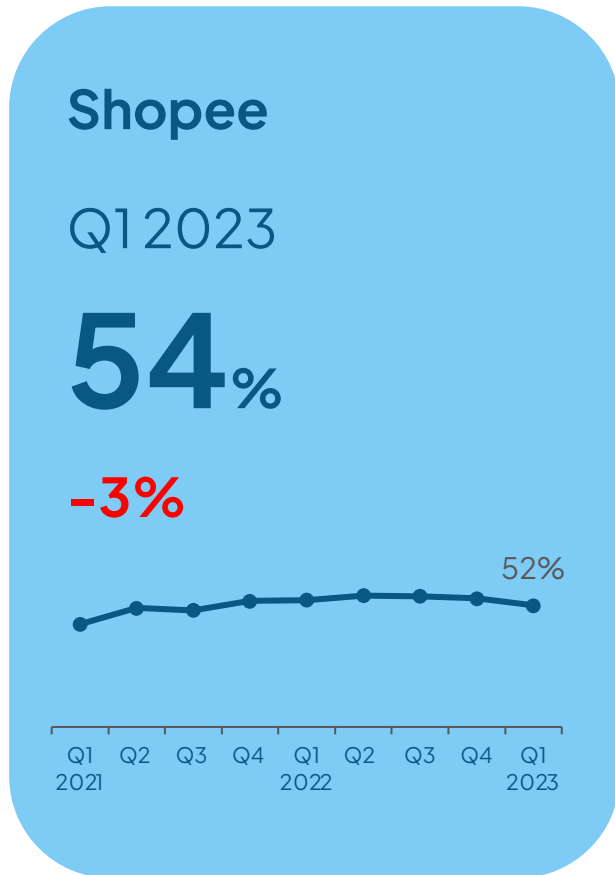


Q: Which of the following platforms/apps do you use for online shopping? Choose all that apply.

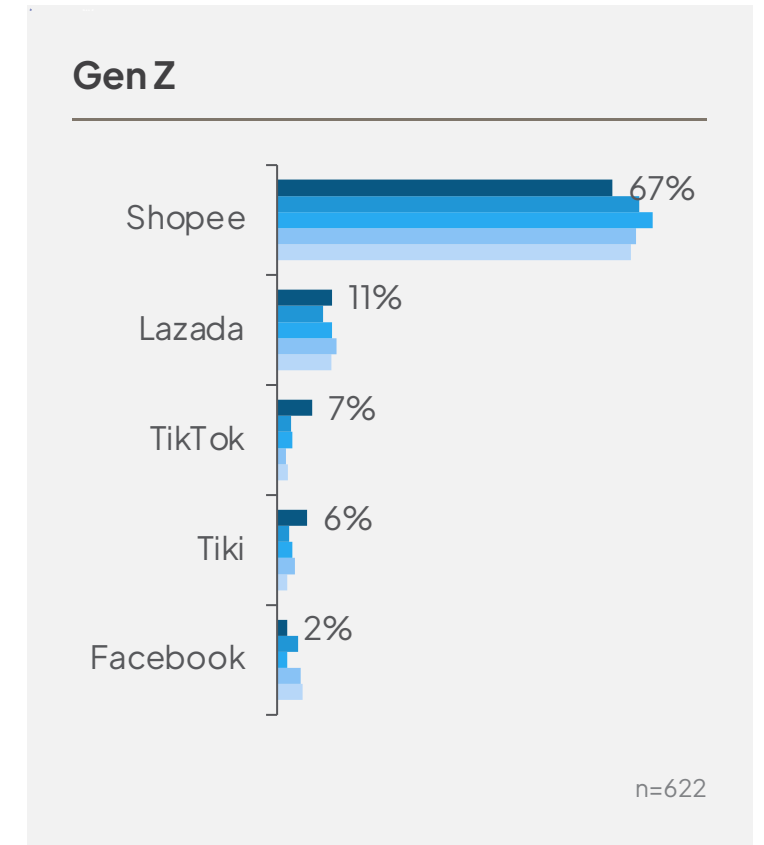
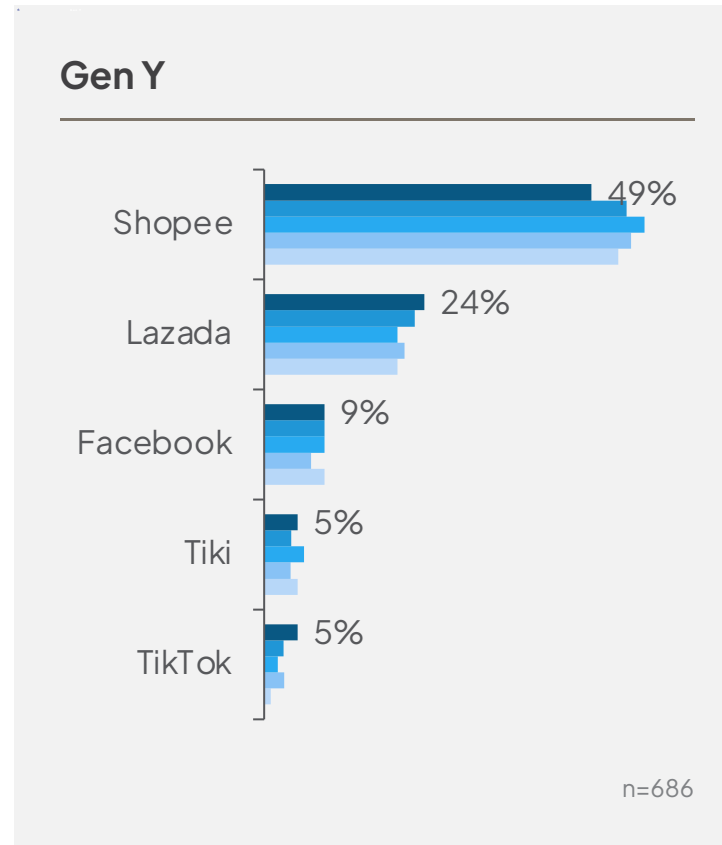
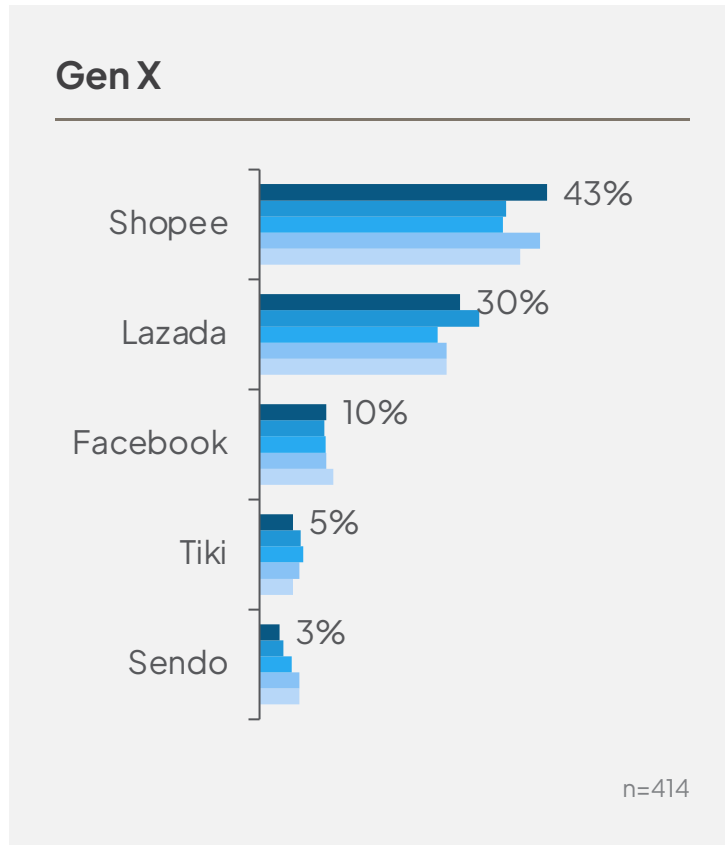
Q1 2023 n=1741



# Shopee suffered from a continued loss of consumer favorability among the top platforms.



# Consumer favorability of Gen Y and Z consumers dropped for Shopee but increased for TikTok Shop.



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

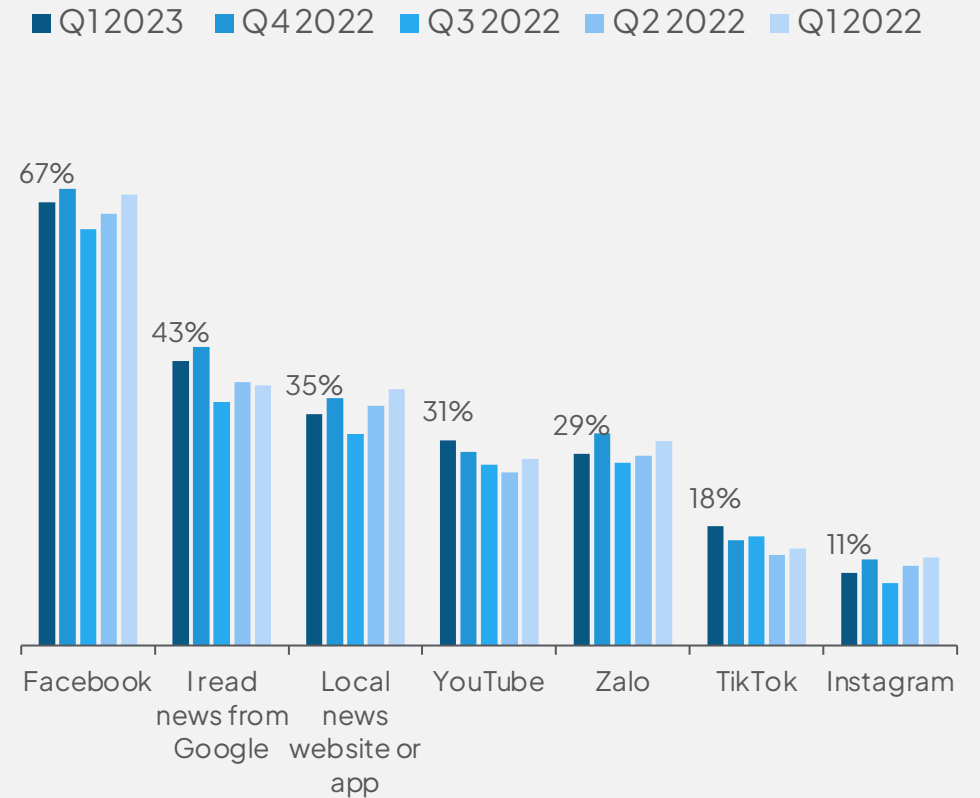
■ Q1 2023 ■ Q4 2022 ■ Q3 2022 ■ Q2 2022 ■ Q1 2021

Gen Z n=622; Gen Y n=686; Gen X n=414

# News

Despite a surge in usage in Q4'22, Facebook saw a slight decline in the number of people using the platform to read news.

Top platforms for news—Penetration rates (%)



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

Q1 2023 n=1741

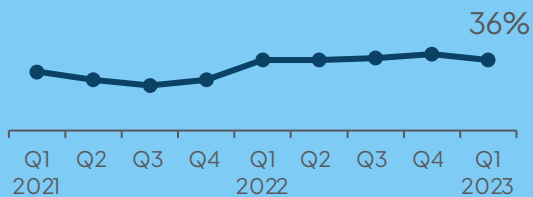
# Facebook was also less preferred as a news source (-3pp).

## Facebook

Q1 2023

36%

-3%

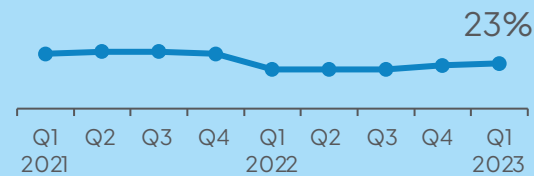


## Google Search

Q1 2023

23%

+1%

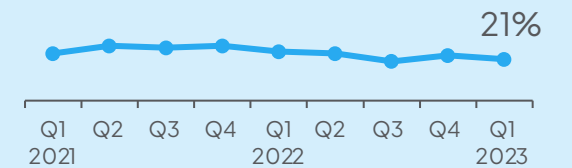


## Local publishers

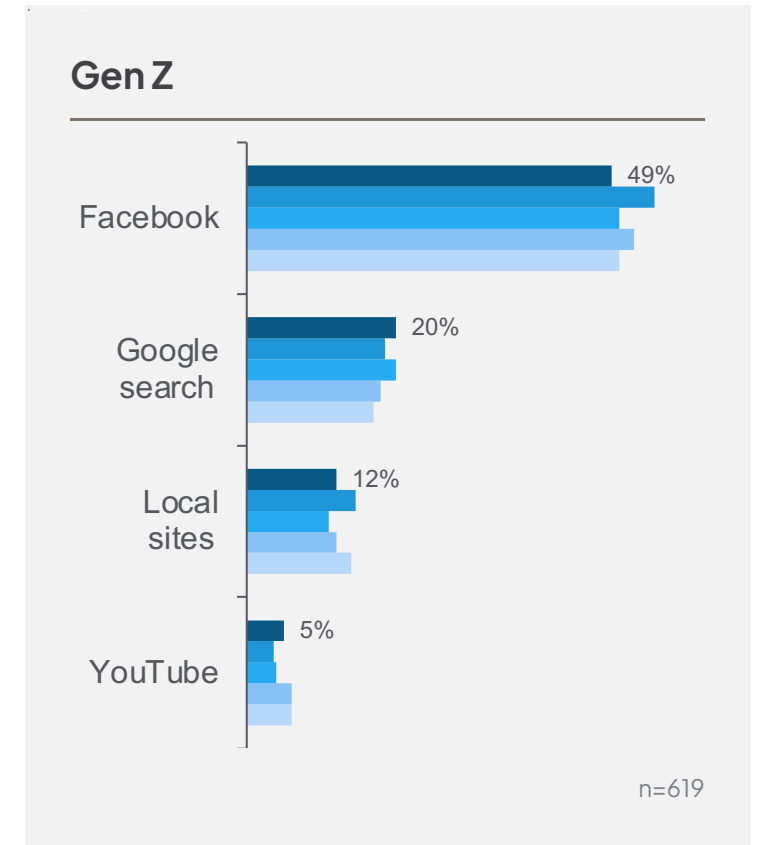
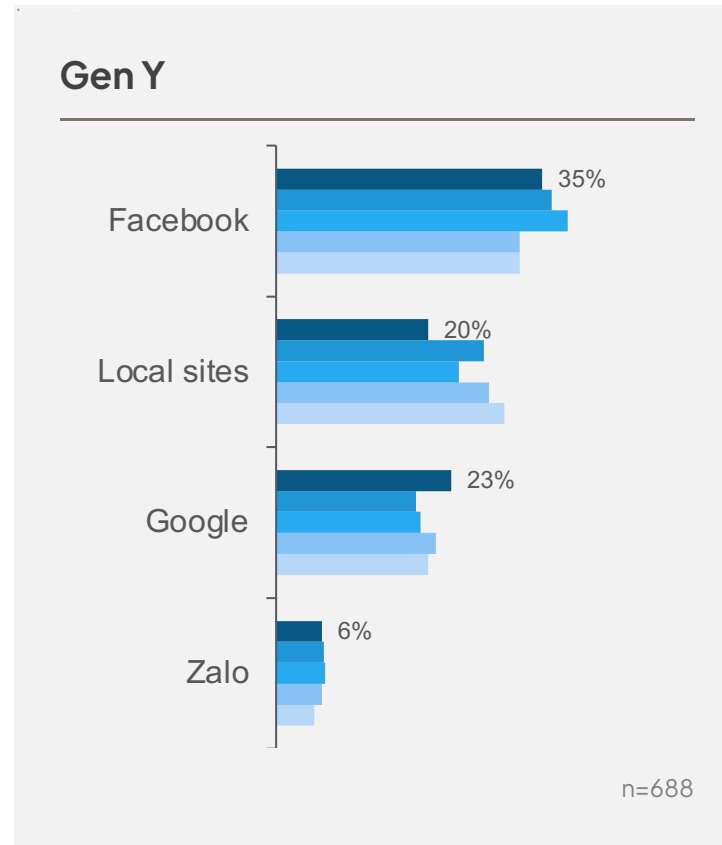
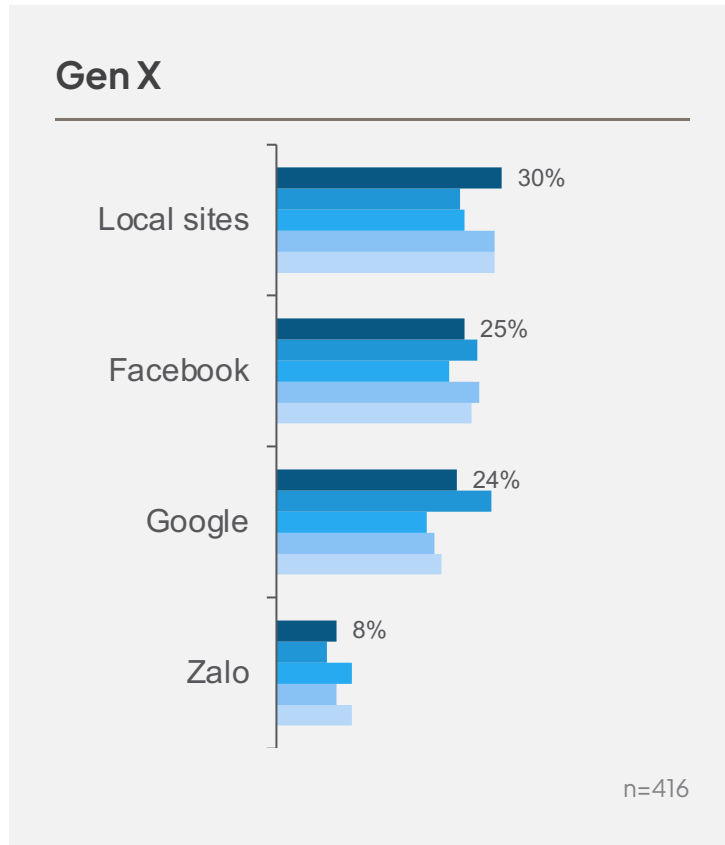
Q1 2023

21%

-2%



# In Q1 2023, Gen Y (+3pp) and Z (+1pp) increased their habits of Googling for news, while Gen X resumed news reading using local websites.



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

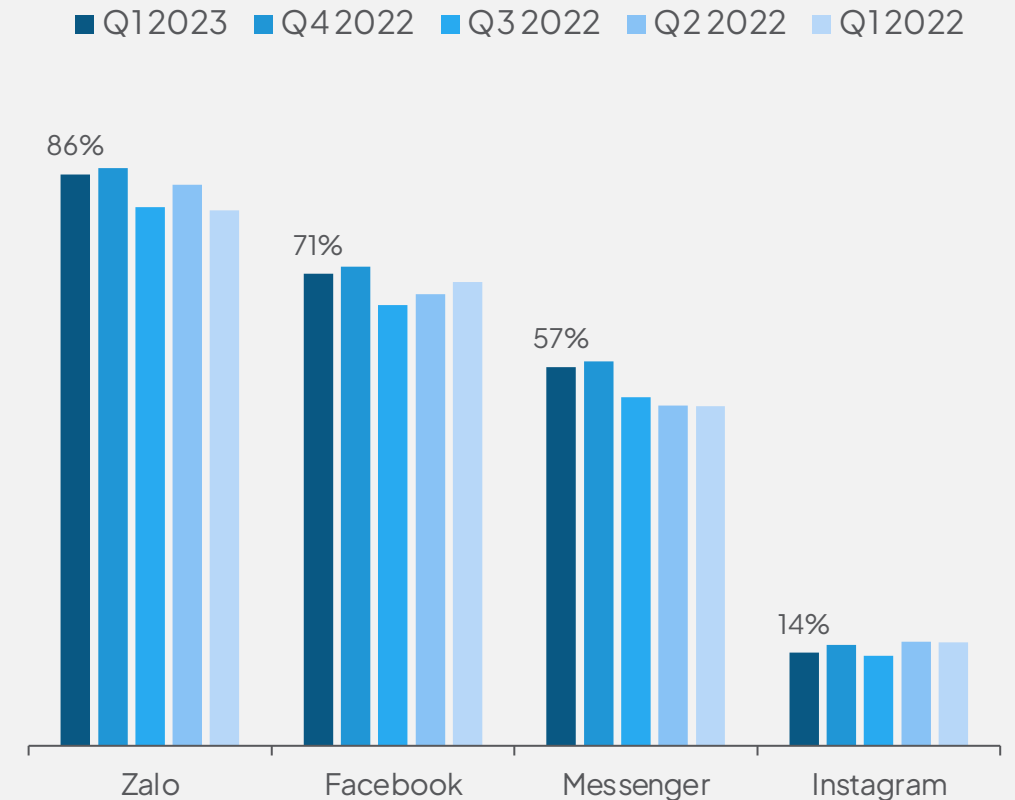
■ Q1 2023 ■ Q4 2022 ■ Q3 2022 ■ Q2 2022 ■ Q1 2021

Gen Z n=619; Gen Y n=688; Gen X n=416

# Messaging

Zalo remained Vietnam’s most used platform for connecting with close ones, despite a slight decrease in usage.

Top platforms for messaging—Penetration rates (%)



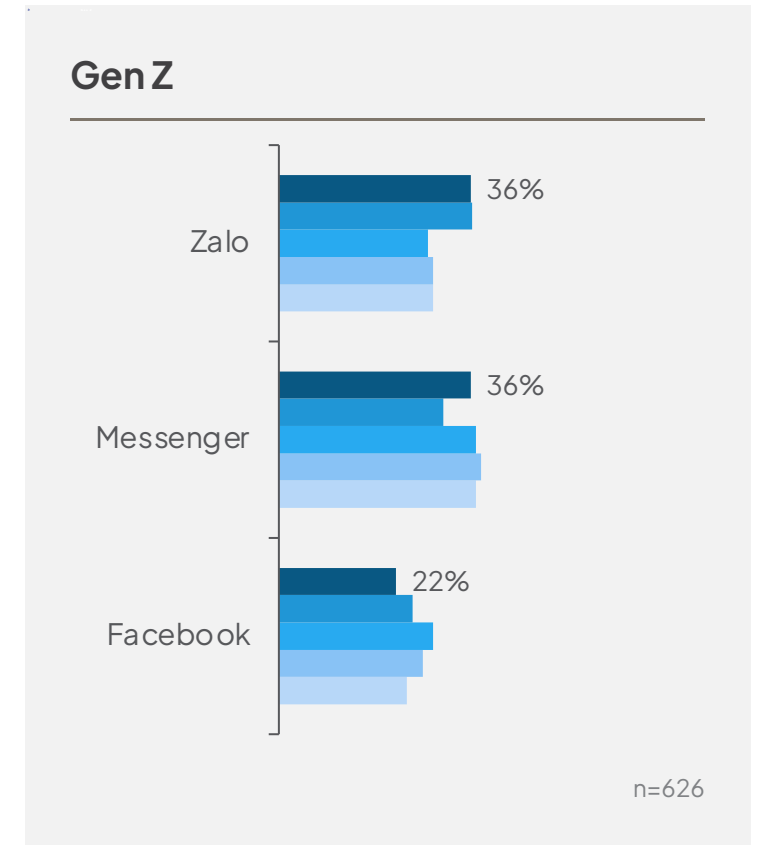
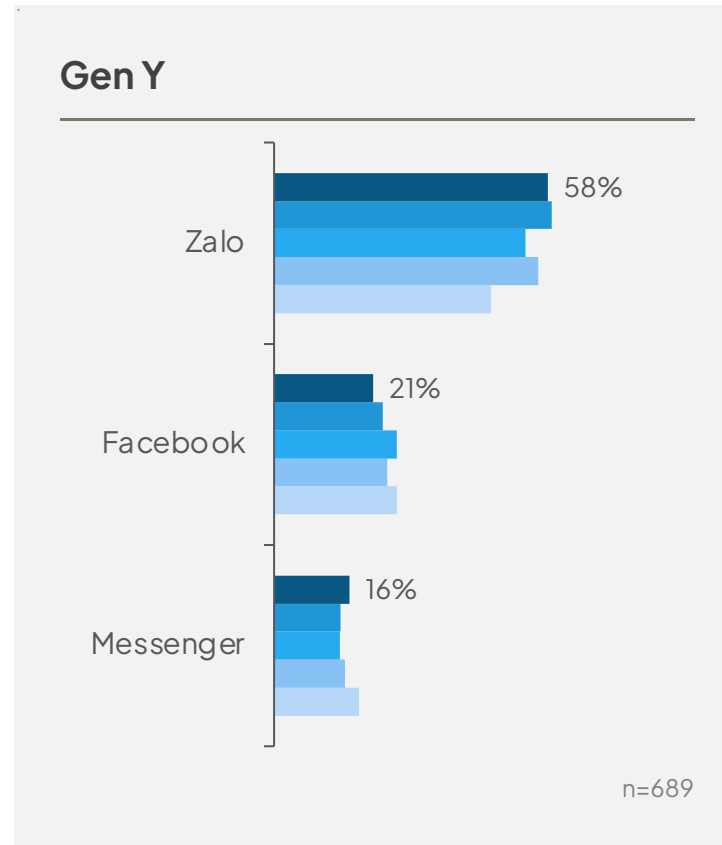
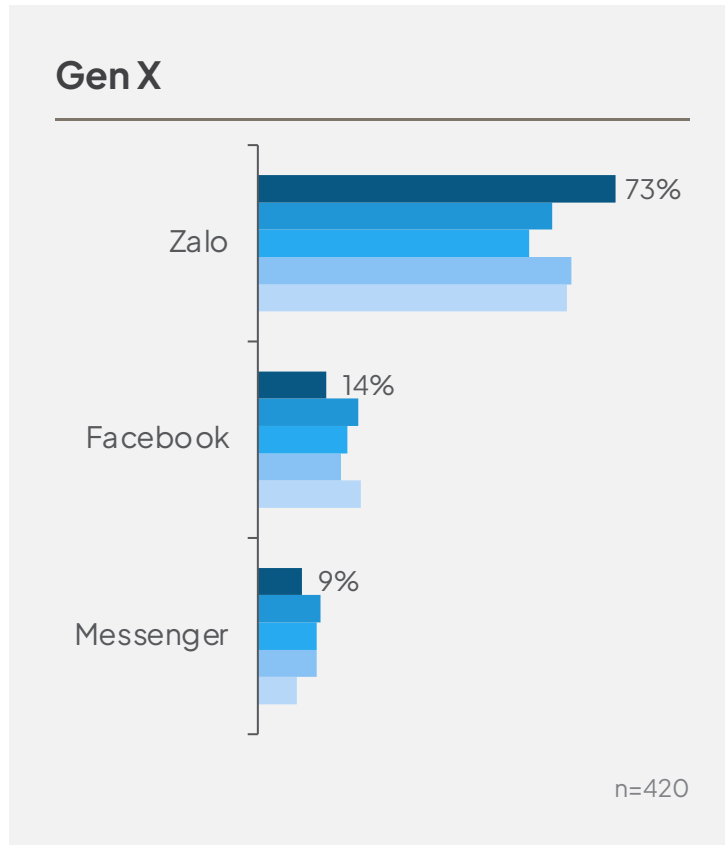
Q: Which websites/apps do you use to connect with friends and family? Choose all that apply.

Q1 2023 n=1741

# Indeed, Zalo gained an additional 3pp as Vietnam's favourite messaging app.



# While Messenger received a 2% boost in messaging preferences from younger generations, Zalo jumped by 5% among the older generation.



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

■ Q1 2023 ■ Q4 2022 ■ Q3 2022 ■ Q2 2022 ■ Q1 2021

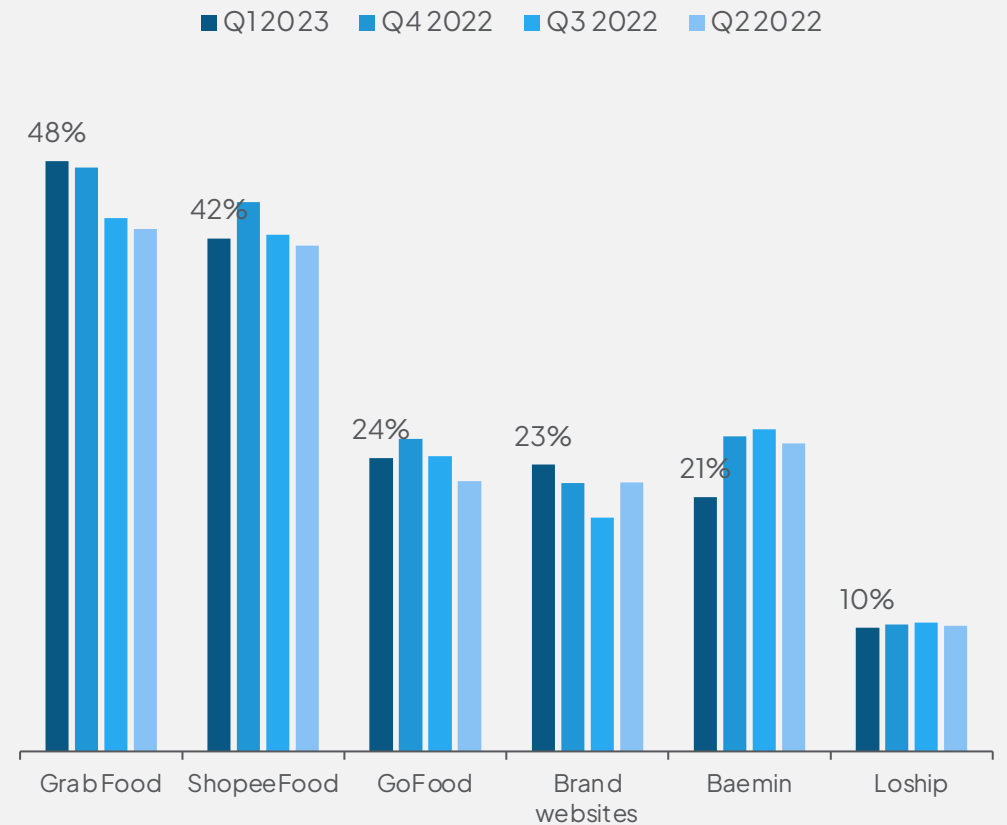
Gen Z n=626; Gen Y n=689; Gen X n=420



# Food Delivery Apps

Grab’s usage maintained in Q1 2023, while slight decreases were observed across platforms.

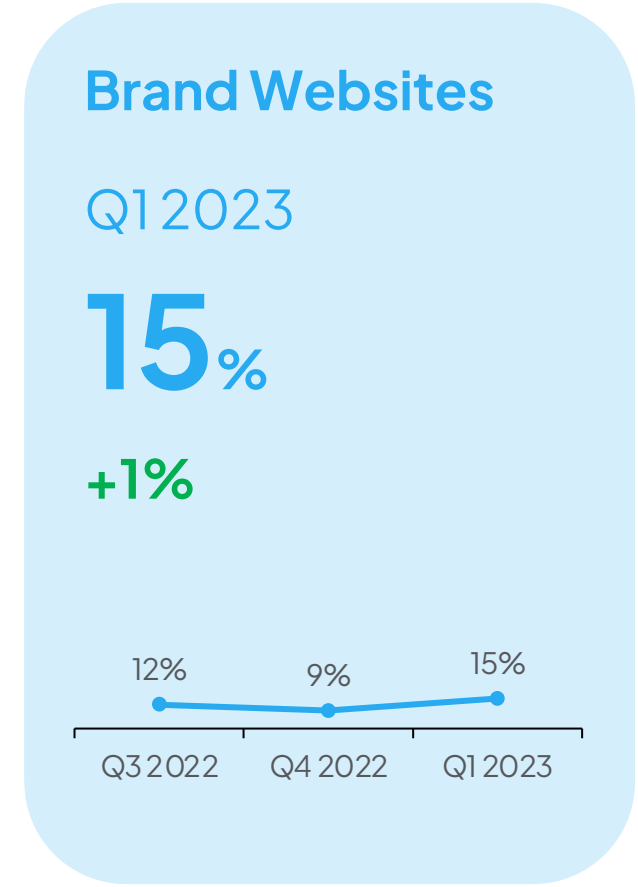
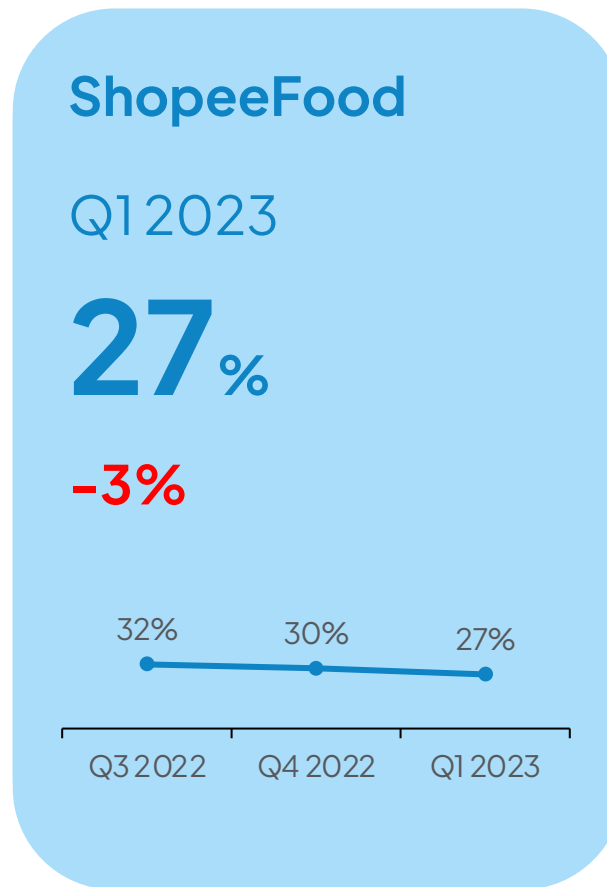
Top food delivery apps—Penetration rates (%)



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

Q1 2023 n=1741

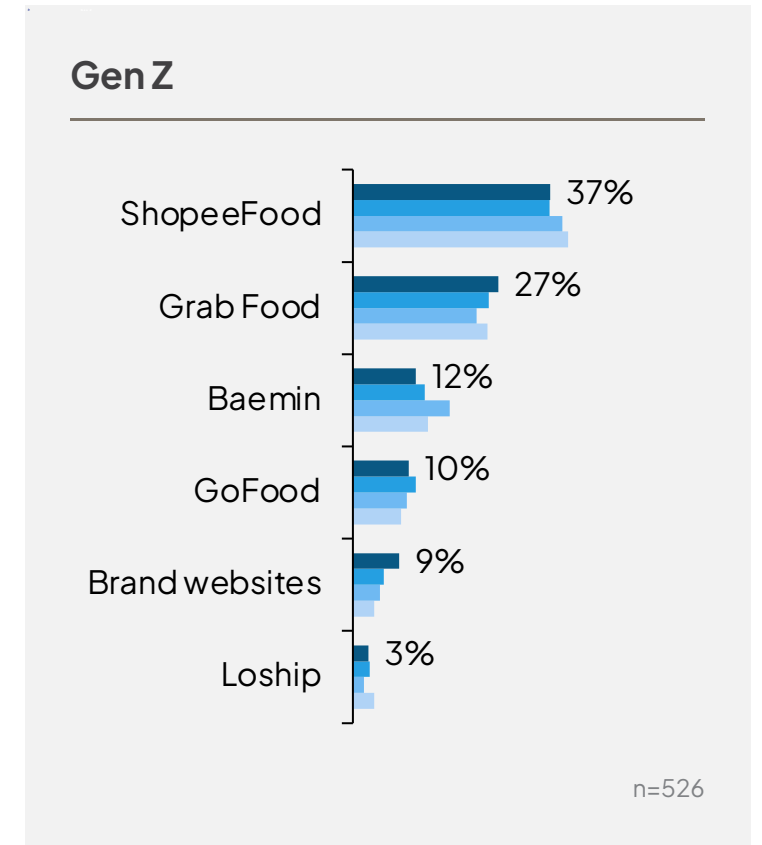
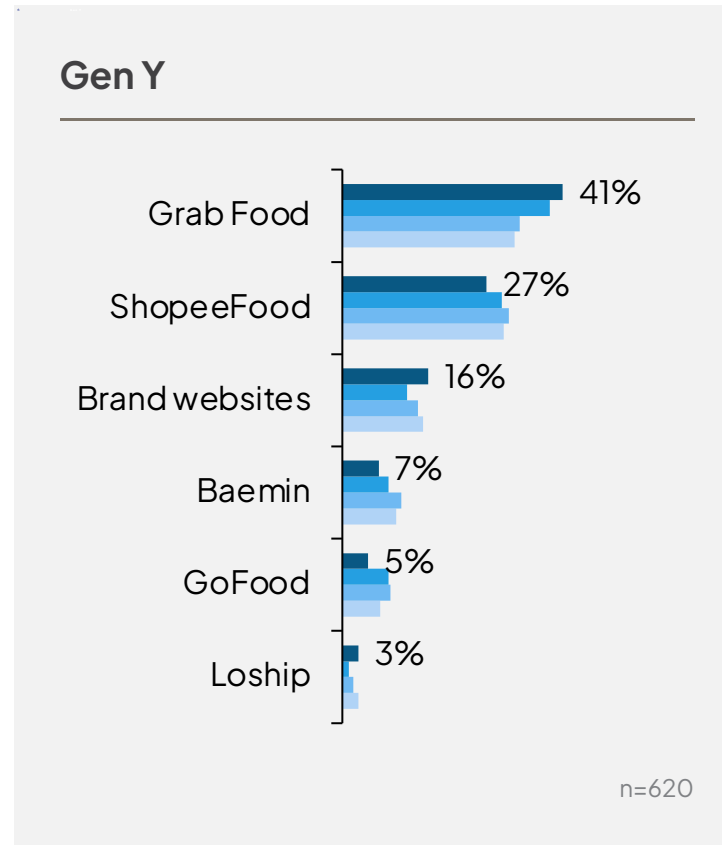
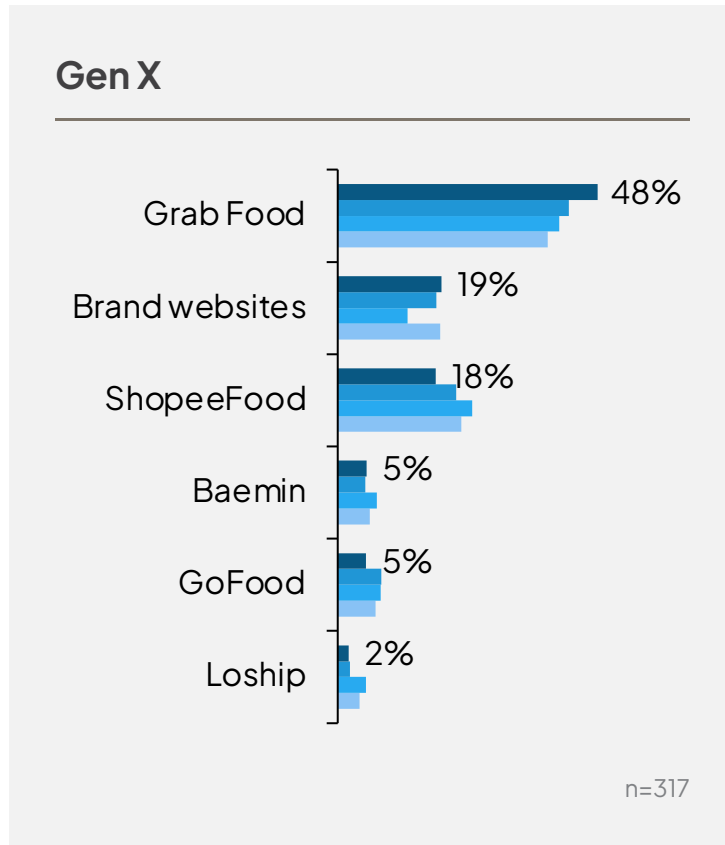
# GrabFood's favorability rose steadily (+4pp), while ShopeeFood was on a downward trajectory in Q1 2023.



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

Q1 2023 n=1741

# GrabFood's favorability rose across generations, especially Gen X (+5pp).



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

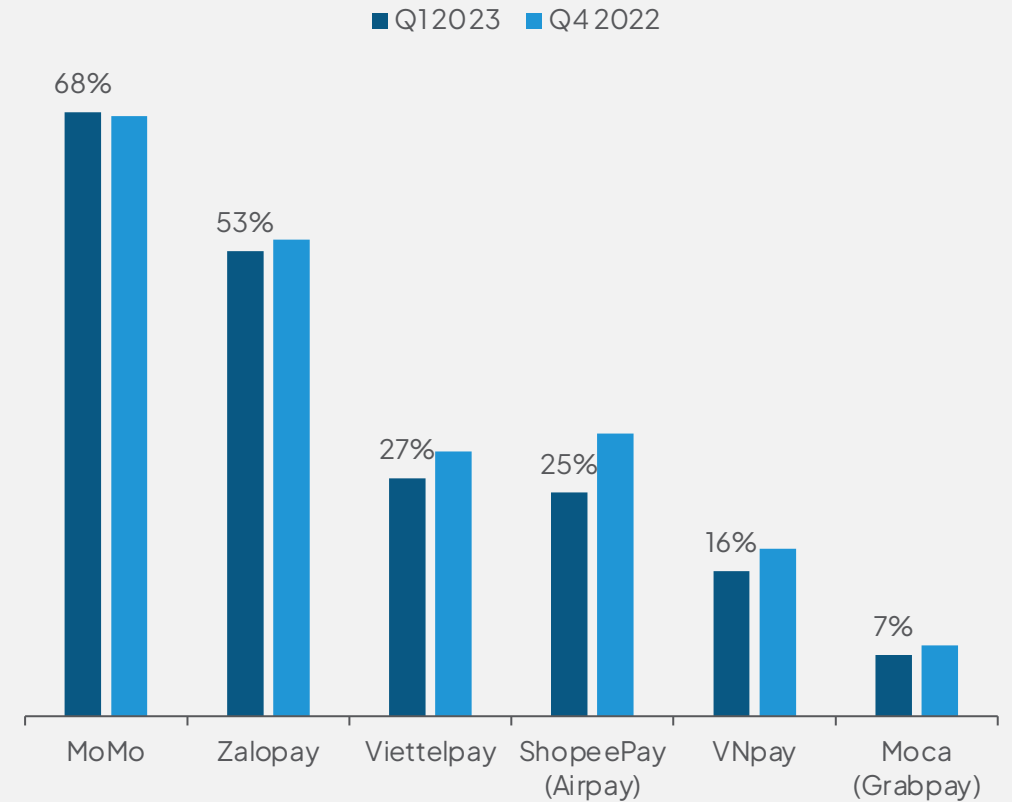
■ Q1 2023 ■ Q4 2022 ■ Q3 2022 ■ Q2 2022 ■ Q1 2021

Gen Z n=526; Gen Y n=620; Gen X n=317

# E-wallet

Usage rates decreased for all e-wallets except MoMo.

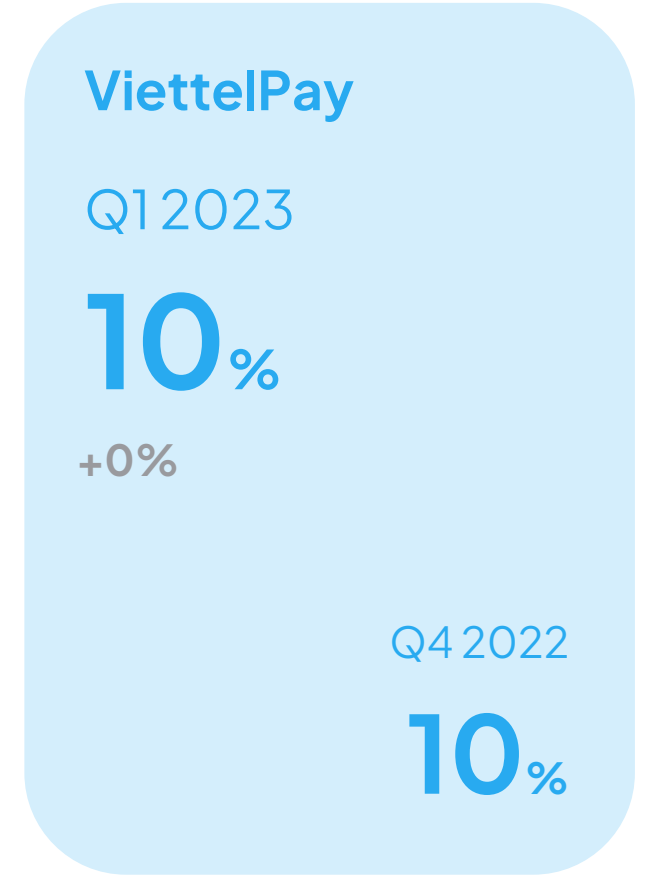
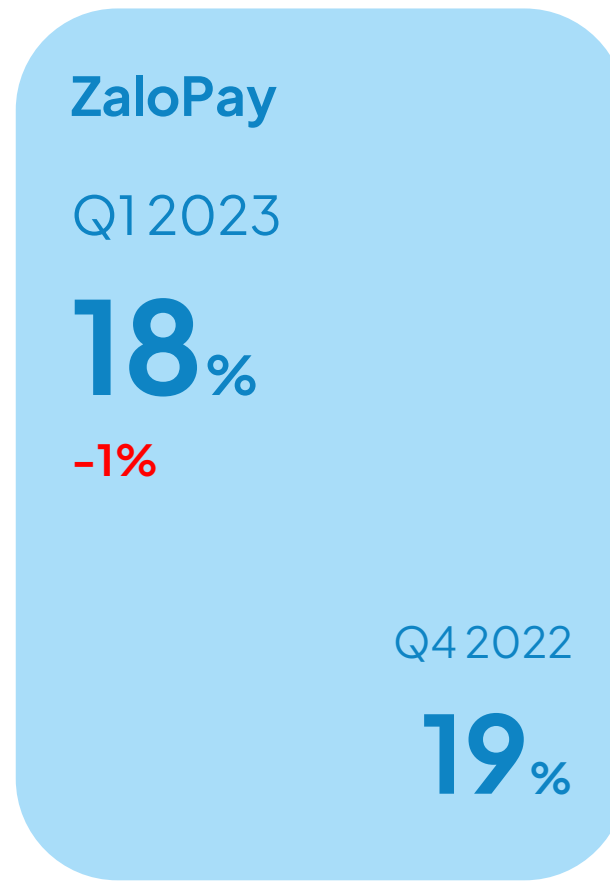
Top e-wallets—Penetration rates (%)



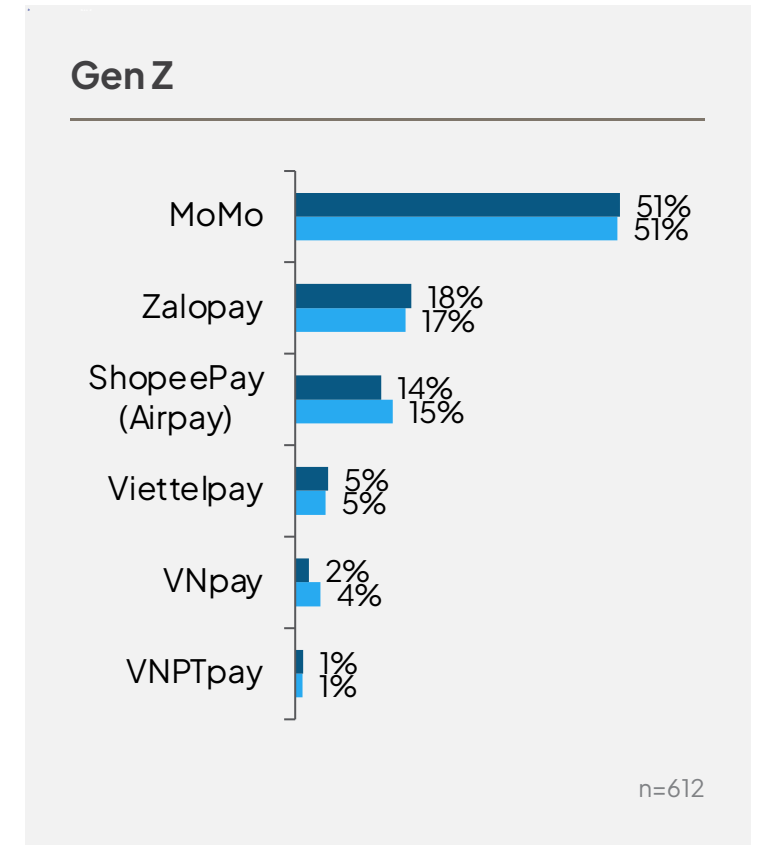
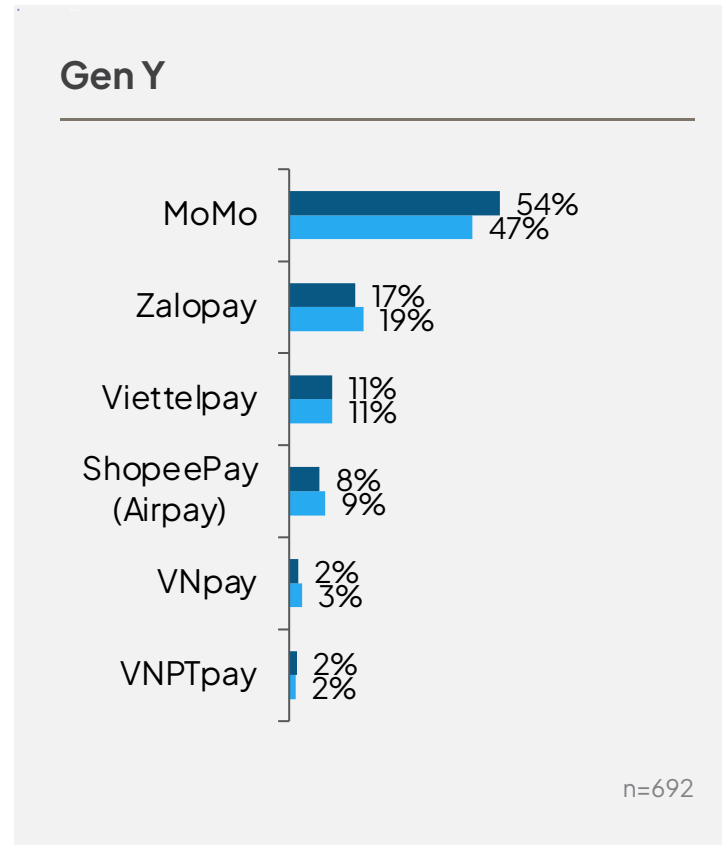
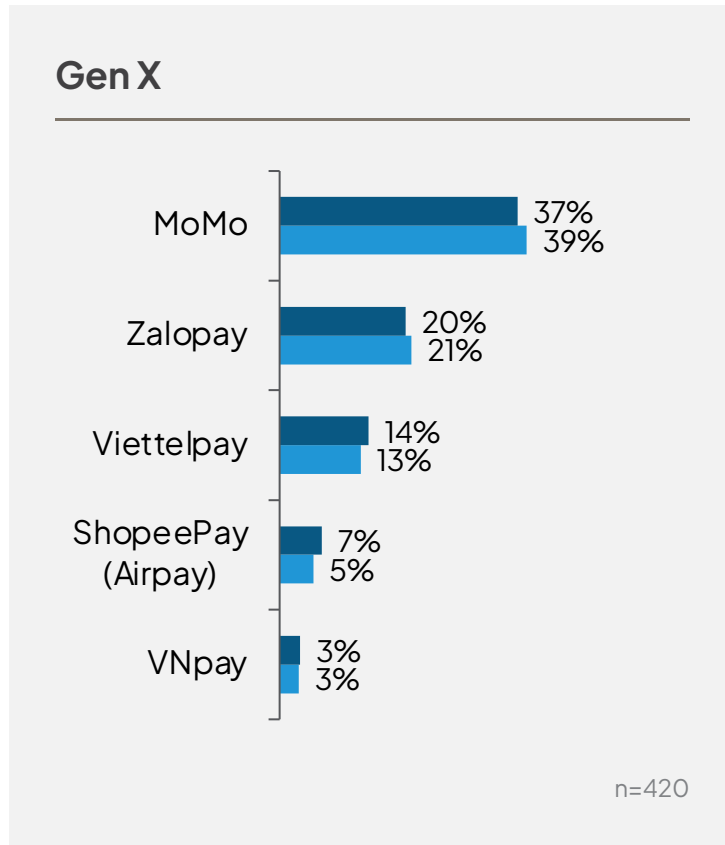
Q: Which E-Wallets do you use? Choose all that apply.

Q1 2023 n=1724

# MoMo also grew in brand favorability with a 2pp increase in preference for consumers.



# This is especially true for Gen Y. Meanwhile, ZaloPay garnered more love from Gen Z.



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

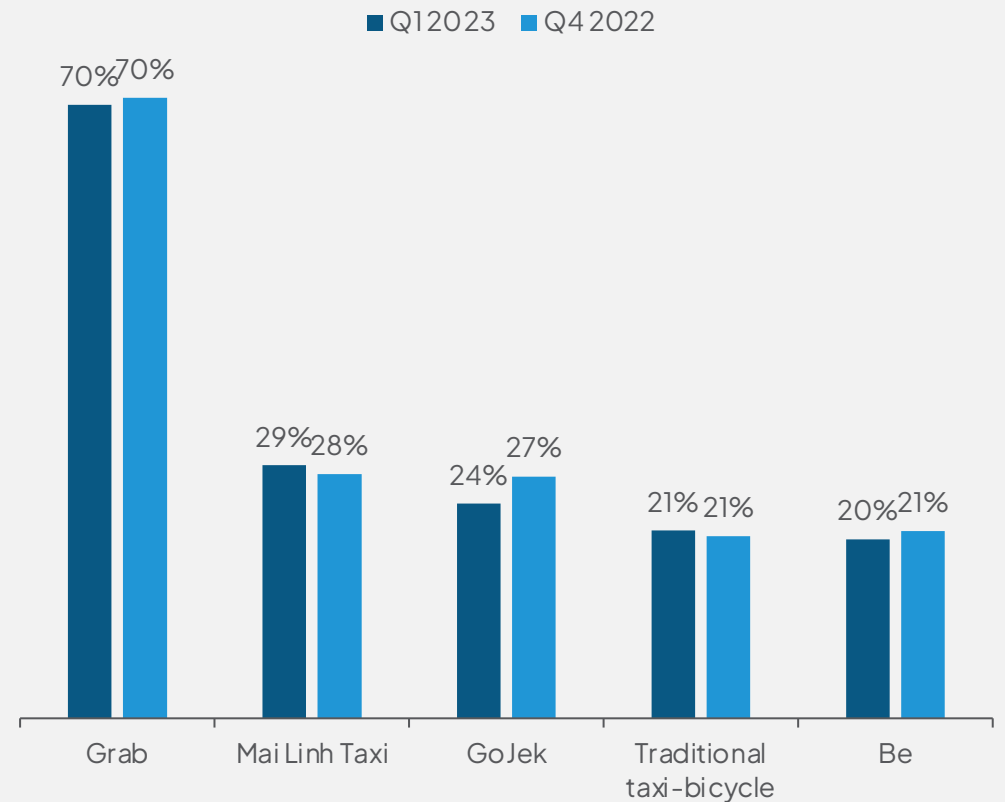
■ Q1 2023 ■ Q4 2022

Gen Z n=612; Gen Y n=692; Gen X n=420

# Ride-hailing

Grab maintained the previous quarter's usage rates, while GoJek saw a 3pp decrease in Q1 2023.

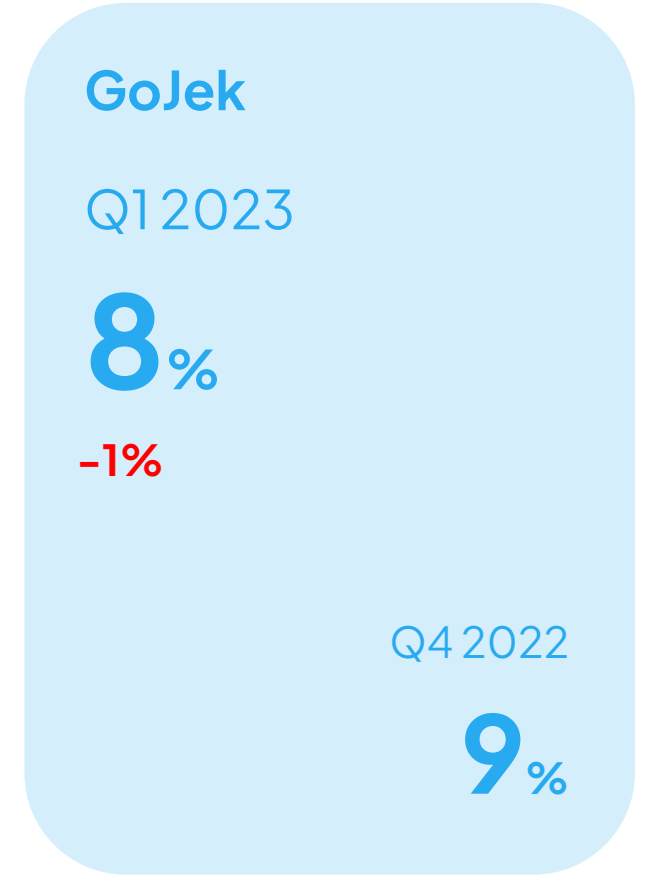
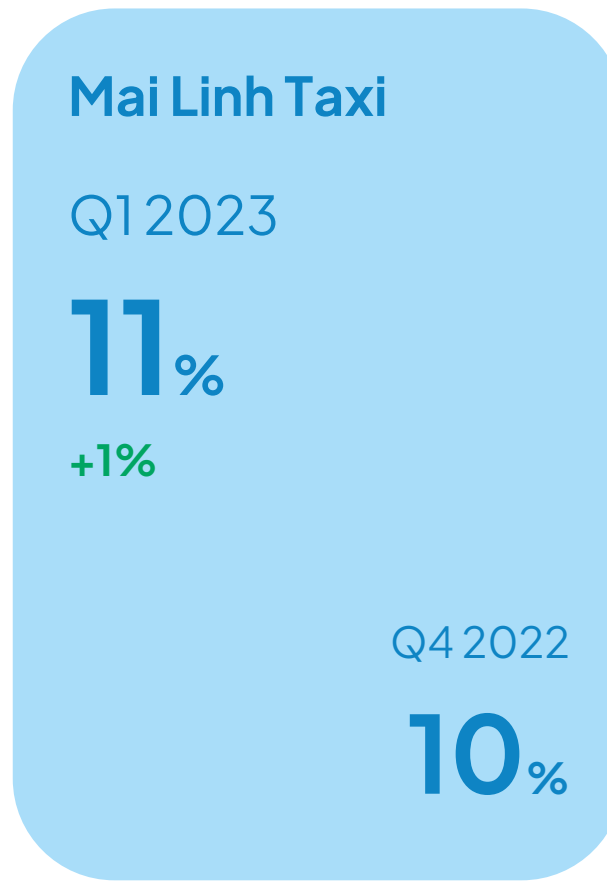
Top ride-hailing apps—Penetration rates (%)



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

Q1 2023 n=1741

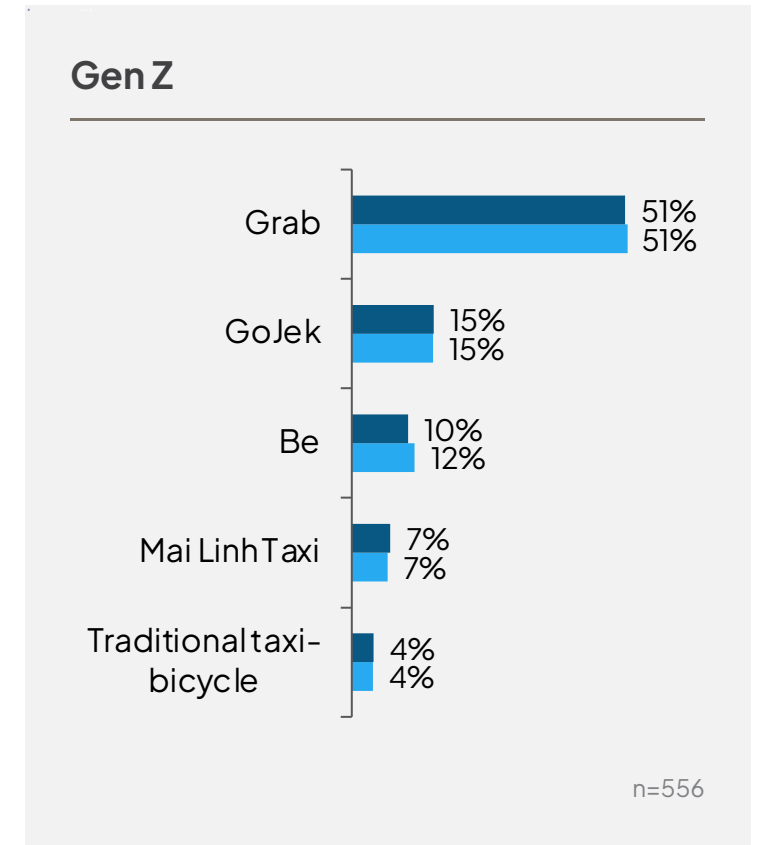
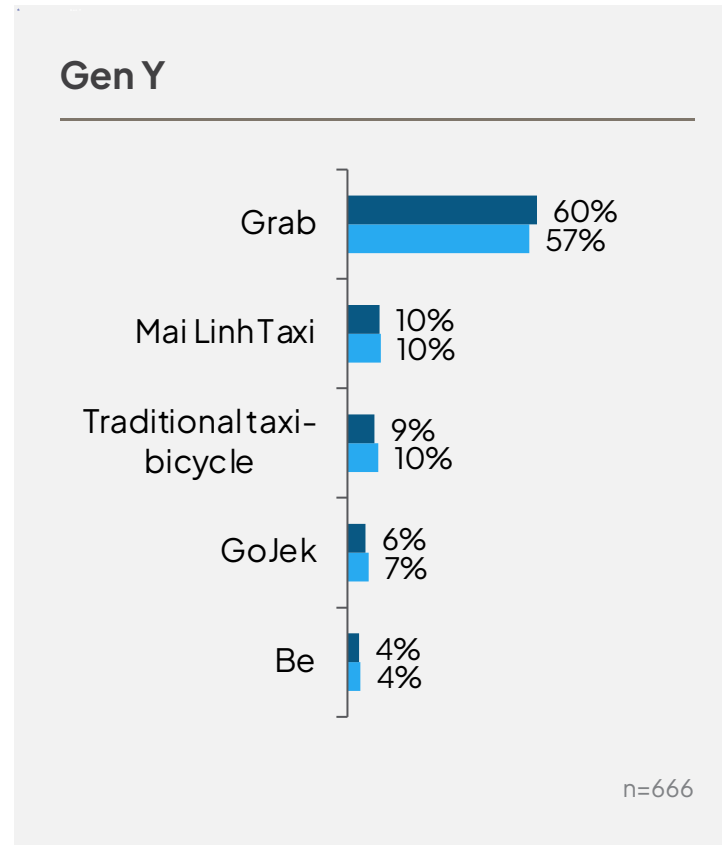
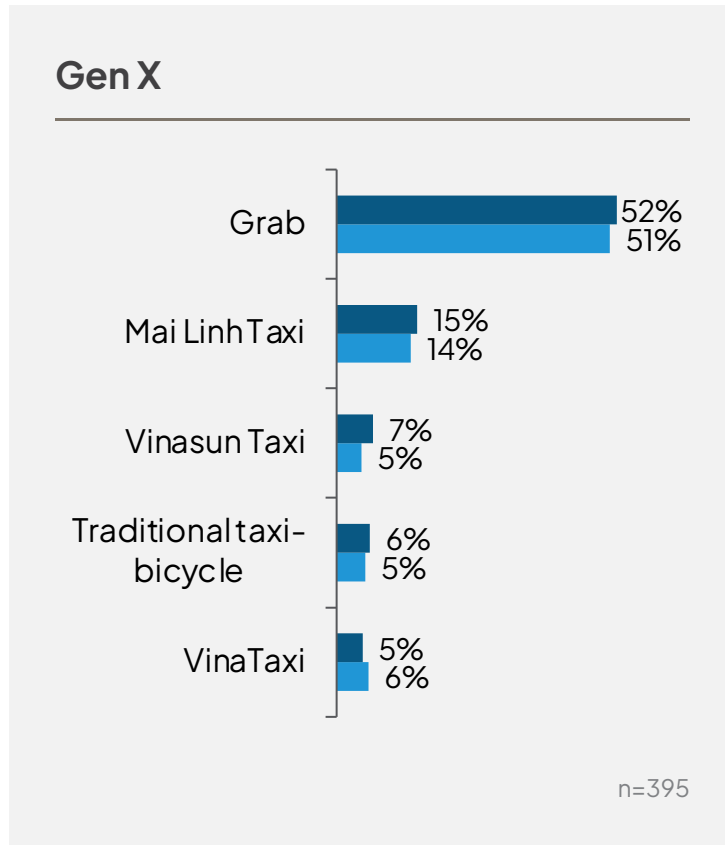
# Grab further exerted dominance in the category with a 2pp increase in consumer favorability.



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



# The source of Grab's preference growth came from Gen Y (+3pp) and X (+1pp).



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

■ Q1 2023 ■ Q4 2022

Gen Z n=556; Gen Y n=666; Gen X n=395

# Opportunities for brands

**Reels** & **Shorts** are rising in usage and preference.

The line between shopping and entertainment is increasingly blurred.

**Super Apps** are increasingly established in Vietnam.

---

With the advent of recent years, **short videos** are undoubtedly here to stay. Brands should diversify short video content distribution to Meta's and Google's platforms in addition to TikTok.

---

Brands should leverage **shoppertainment** more, using platforms like **TikTok Shop** and collaborating with **influencers** or **live-streamers** as viable e-commerce channels.

---

**Collaboration opportunities & newer advertising channels** for brands to commercialise their existing user bases.

# Measure the Connected Consumer on a daily basis

## YouGov® BrandIndex

Powerful, daily brand and competitor tracking

YouGov BrandIndex tracks brand health with daily consumer data in 55+ markets. Use historical and current data to compare your brand with competitors and the market on **16 vital brand health metrics**. In Vietnam, we cover more than **430 brands across ten different sectors**.

## YouGov® Profiles

Unparalleled audience intelligence

YouGov Profiles is a living data source with **10,000+ variables** from our engaged panel, updated weekly. Learn about your consumers' **demographics, psychographics, attitudes and behaviours**. Reach your ideal audience on the right channels with targeted campaigns.

# Marketing Mix Modeling

...

The new way to measure in the connected world



# How do you measure marketing activities in a connected and privacy-conscious world?

**Marketing Mix Modelling (MMM)** is a privacy-friendly, data-driven statistical analysis that quantifies the incremental sales impact and ROI of marketing and non-marketing activities.

- MMM doesn't require individual or log-level information; all analysis is aggregated;
- MMM is remarkably customisable for all businesses, metrics, and individual circumstances;
- MMM is highly scalable and available;
- MMM can be very actionable and used for forward-facing scenarios;



# Meta & Decision Lab partnered to facilitate powerful Marketing Mix Modeling to Vietnam

Meta, formerly known as Facebook, and Decision Lab, a leading research company in Vietnam, announced a strategic partnership to launch Robyn, a new marketing mix modelling tool, in Vietnam.

Robyn is **an experimental Marketing Mix Modeling (MMM) package** from Meta Marketing Science. It uses machine learning to measure and optimise media channel efficiency and effectivity and explore adstock rates and saturation curves. Robyn works well with detailed data for digital and direct-response advertisers.

**Decision Lab**



 **Meta**

 **Robyn**

# MMM identifies and quantifies the impact of each marketing activity.

## External Factors

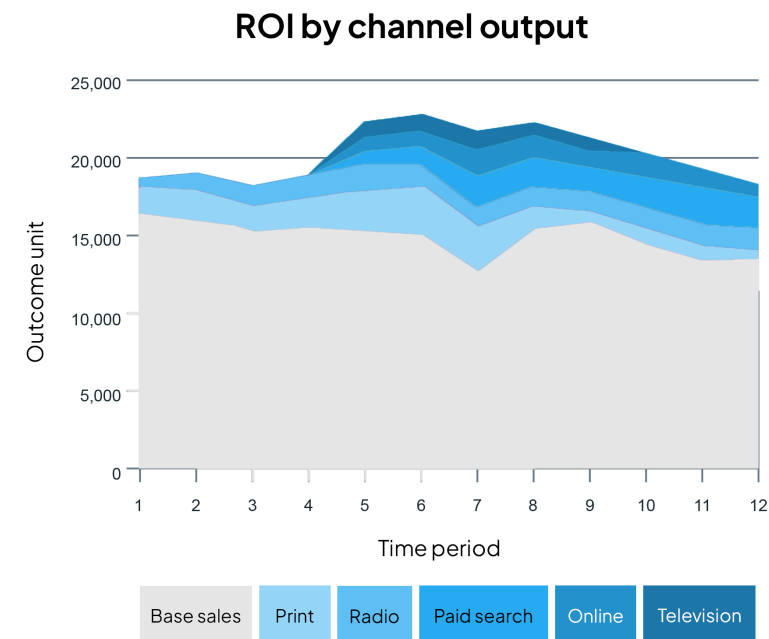
- Macro factors
- Weather
- Promotions and pricing
- Seasonality
- Competition
- Etc.

## Marketing Inputs

- Paid Search
- SEO
- SoMe
- Email
- TV
- Etc.

Sales  
KPI

MMM  
Statistical  
Regression  
Modeling



MMM takes historical aggregated data from marketing and non-marketing sources to identify precisely what causes sales.

# What does MMM deliver for your brand?

MMM addresses a wide range of strategic and tactical questions across the organization for marketers.

Approximates **the true ROI** of different marketing activities



Measures **holistic impact** across channels



Supports **“what-if” analysis** for future budget allocations across marketing channels, products, and regions



# Why us?

**Olivia**  
IT Recruiter • Team Leader

**About me**

Olivia has always been interested in recruiting and she has a knack for it. Starting as a freelancer, she then joined the recruitment team in one of the IT companies as she loves human contact.

Olivia has the kind of friendly and energetic personality that candidates love to be around, and if you're lucky enough to be one of her candidates you'll get 100% from her.

A couple of months ago she was promoted to the Team Leader position leading a team of five IT Recruiters.

She is more and more into managing people and employer branding.

**Demographic**

Age: 33  
Location: Berlin, Germany  
Income: €51,000/yr

**Personality**

Introvert: [Low] Extrovert: [High]  
Thinking: [Low] Feeling: [High]  
Sensing: [Low] Intuition: [High]  
Judging: [Low] Perceiving: [High]

**Pain points**

Spending too much time on sourcing candidates and reviewing.

Has problems supporting and managing her team properly with no option to assign projects.

The current ATS solution her team uses is cluttered, hard to figure out.

**Work experience**

Early adopter

*... I take great pride helping others get hired.*

## ADVANCED ANALYSTS

Our international team of consultants takes pride in taming data and delivering structured and concise decision support.



## LIVING CONNECTED DATA

We have over 100,000 data points to connect your brand, consumers, and marketing performance.

## POWERFUL PARTNERSHIP

We are Meta's trusted partner in distributing Robyn – an MMM package from Meta Marketing Science.

**Contact us to learn  
more about MMM  
and optimise your  
media spending**



**Nguyen Thanh Cao**

Associate Director

[ntc@decisionlab.co](mailto:ntc@decisionlab.co) | +84 902 318 613

# Reach out to us



2nd Floor - Sonatus Building,  
15 Le Thanh Ton, District 1,  
Ho Chi Minh City, Vietnam

+84 28 7101 0199

[decision@decisionlab.co](mailto:decision@decisionlab.co)

[www.decisionlab.co](http://www.decisionlab.co)

