VIETNAM
DIGITAL LANDSCAPE 2017
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01 VIETNAM DIGITAL MARKET OVERVIEW
VN in global context

Internet user 2016: 49 millions
Penetration: 52% of population
Ranking: 13th
User 1-year change: 3.3%
Overview: Vietnam Population

Total population: 94,93 millions

By gender:
- 49%
- 51%

By region:
- 69%
- 31%
Overview: Vietnam Population

Vietnam population Structure by Age

- 0-14: 23.84%
- 15-24: 16.69%
- 25-54: 45.22%
- 55-64: 8.24%
- 65+: 6.01%

These generations (15-54) are main target audiences of Digital Marketing.
Overview: Vietnam Internet Users

Number of internet users in Vietnam from 2025 to 2021 in millions

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Users (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>44.3</td>
</tr>
<tr>
<td>2016</td>
<td>48.2</td>
</tr>
<tr>
<td>2017</td>
<td>52.1</td>
</tr>
<tr>
<td>2018</td>
<td>55.8</td>
</tr>
<tr>
<td>2019</td>
<td>59.3</td>
</tr>
<tr>
<td>2020</td>
<td>62.6</td>
</tr>
</tbody>
</table>
Overview: Vietnam Internet Users

Number of mobile phone Internet users in Vietnam from 2014 to 2021 in millions

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Users (in millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>41.81</td>
</tr>
<tr>
<td>2015</td>
<td>46.76</td>
</tr>
<tr>
<td>2016</td>
<td>51.42</td>
</tr>
<tr>
<td>2017</td>
<td>55.54</td>
</tr>
<tr>
<td>2018</td>
<td>59.04</td>
</tr>
<tr>
<td>2019</td>
<td>61.91</td>
</tr>
<tr>
<td>2020</td>
<td>64.24</td>
</tr>
<tr>
<td>2021</td>
<td>66.1</td>
</tr>
</tbody>
</table>
Overview: Vietnam Internet Users

Which devices do people use?

- Mobile phone: 98%
- Smartphone: 72%
- Computer: 44%
- Tablet: 14%
ONLINE POPULATION DEMOGRAPHIC
Online population demographic

Percentage of Vietnamese who use Internet for personal purpose by age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>55+</td>
<td>52</td>
<td>48</td>
</tr>
<tr>
<td>45-54</td>
<td>59</td>
<td>41</td>
</tr>
<tr>
<td>35-44</td>
<td>75</td>
<td>25</td>
</tr>
<tr>
<td>25-34</td>
<td>86</td>
<td>14</td>
</tr>
<tr>
<td>Under 25</td>
<td>96</td>
<td>4</td>
</tr>
</tbody>
</table>

Base: Online and Offline population, n= 256
Percentage of Vietnamese who use Internet for personal purpose by Gender

82% (male)  73% (female)

Base: Online and Offline population, n= 492
03 VIETNAM INTERNET USER BEHAVIOR
Vietnam Internet User Behavior

Percentage of devices used to online

- More often via smartphone than computer/table: 30%
- Equally via smartphone & computer/table: 14%
- More often via computer/table than smartphone: 55%

Vietnam users tend to use smartphone to go online more than computer or table, which is called as “mobile trend”

Base: Internet users, n=765
Vietnam Internet User Behavior

Most popular online activities in Vietnam in 2015

- **Read newspaper**: 87% Daily, 15% Weekly
- **Access e-mail**: 79% Daily, 8% Weekly
- **Participate in forum, social networks**: 77% Daily, 10% Weekly
- **Entertainment**: 73% Daily, 17% Weekly
- **Research/ study**: 72% Daily, 19% Weekly
- **Play game**: 44% Daily, 15% Weekly
- **Search for information of goods**: 41% Daily, 15% Weekly
- **Others**: 49% Daily, 11% Weekly

Base: Internet User, n=967
Vietnam Internet User Behavior

Most popular mobile Internet activities in Vietnam in 2015

- Read newspaper: 87% daily, 6% weekly
- Access e-mail: 78% daily, 13% weekly
- Participate in forum, social networks: 78% daily, 10% weekly
- Entertainment: 77% daily, 14% weekly
- Play game: 52% daily, 12% weekly
- Research/study: 65% daily, 18% weekly
- Search for information of goods and...: 42% daily, 14% weekly
- Others: 50% daily, 8% weekly

Base: Internet User, n=967
Overview: Vietnam Internet Users

Weekly access of online video 2015

Viet Nam 92%  Phillippines 85%  Indonesia 81%  Thailand 76%  Malaysia 74%  Singapore 62%

Series 1  Column1  Column2
Vietnam Internet User Behavior

Frequency of watching online video

- Every day: 52%
- Every week: 36%
- Every month: 8%
- Less than once a month: 3%
- Never watch online video: 2%
Online video access by device in 2015

- Smartphone: 62%
- PC: 58%
- Tablet: 18%
- Smart TV: 12%
- TV box: 2%
Vietnam Internet User Behavior

And comes the new trend, Video-on-demand...

Type of video-on-demand watched in 2015

<table>
<thead>
<tr>
<th>Type of Video-on-Demand</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Movies</td>
<td>97%</td>
</tr>
<tr>
<td>Music shows</td>
<td>90%</td>
</tr>
<tr>
<td>Music shows</td>
<td>89%</td>
</tr>
<tr>
<td>Overseas drama series</td>
<td>87%</td>
</tr>
<tr>
<td>Overseas TV networks</td>
<td>84%</td>
</tr>
<tr>
<td>Lifestyle</td>
<td>83%</td>
</tr>
<tr>
<td>Local drama series</td>
<td>82%</td>
</tr>
<tr>
<td>Local sport available on local TV</td>
<td>81%</td>
</tr>
<tr>
<td>Overseas sport not easily accessible on TV</td>
<td>80%</td>
</tr>
<tr>
<td>Overseas sport not easily...</td>
<td>79%</td>
</tr>
<tr>
<td>Documentaries</td>
<td>77%</td>
</tr>
<tr>
<td>Children's program</td>
<td>26%</td>
</tr>
</tbody>
</table>
Vietnam Internet User Behavior

Type of video-on-demand watched in 2016

- Movies: 90%
- TV programs: 56%
- Comedies: 54%
- New shows: 48%
- Reality shows: 45%
- Dramas: 44%
- Sports: 42%
- Original series: 39%
- Short form video content: 37%
Vietnam Internet User Behavior

- Daily time spent on device
  - On Average (via any device): 2h33m
  - Via PC or Tablet: 6h53m
  - Via Mobile: 2h39m

Ecomobi
Do the right thing
Revenue in digital advertising in Vietnam amounts to **76 millions** USD in 2017.

The largest segment of the market is “search advertising” with an estimated market volume of **33 millions** USD.
05 VIETNAM MOBILE
### Vietnam mobile

<table>
<thead>
<tr>
<th>Mobile connections by type</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of mobile connections</td>
<td>124.7 millions</td>
</tr>
<tr>
<td>Mobile connections as a percentage of total population</td>
<td>131 %</td>
</tr>
<tr>
<td>Percentage of mobile connections that are pre-paid</td>
<td>89 %</td>
</tr>
<tr>
<td>Percentage of mobile connection that are post-paid</td>
<td>11 %</td>
</tr>
<tr>
<td>Percentage of mobile connections that are broadband (3G &amp; 4G)</td>
<td>30 %</td>
</tr>
</tbody>
</table>
Vietnam mobile

Number of smartphone users in VN from 2015 to 2021 (in millions)

- 2015: 20.6 million
- 2016: 24.6 million
- 2017: 28.5 million
- 2018: 32 million
- 2019: 37.8 million
- 2020: 40 million
Online activities on smartphone

What online activities do people do on their smartphones at least weekly?

- Visit social networks: 78%
- Watch online videos: 77%
- Use Search engines: 69%
- Listen to music: 53%
- Play games: 37%
- Look for product information: 21%
- Check mail: 20%
- Look up maps and directions: 7%

Base: Internet user, n=765
Vietnam mobile

Average daily time spent on mobile apps by smartphone users in 2016 in minutes

- China: 45 minutes
- Vietnam: 51 minutes
- Malaysia: 59 minutes
- Thailand: 68 minutes
- Indonesia: 69 minutes
- Philippines: 72 minutes
Vietnam mobile

Top 3 app categories used daily

1/ Social networking 94%

2/ Search 77%

3/ Messaging/ communications: 61%
Vietnam mobile

Time spent on daily used apps

- Social networking
- Messaging/communications
05 VIETNAM SOCIAL NETWORK
### Vietnam Social Network

#### Top active social platforms

<table>
<thead>
<tr>
<th>Platform</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>51%</td>
</tr>
<tr>
<td>Youtube</td>
<td>51%</td>
</tr>
<tr>
<td>Facebook Messenger</td>
<td>37%</td>
</tr>
<tr>
<td>Zalo</td>
<td>30%</td>
</tr>
<tr>
<td>Google+</td>
<td>32%</td>
</tr>
<tr>
<td>Wechat</td>
<td>13%</td>
</tr>
<tr>
<td>Linkedin</td>
<td>14%</td>
</tr>
<tr>
<td>Viber</td>
<td>18%</td>
</tr>
<tr>
<td>Skype</td>
<td>21%</td>
</tr>
<tr>
<td>Insta</td>
<td>22%</td>
</tr>
<tr>
<td>Twitter</td>
<td>22%</td>
</tr>
<tr>
<td>Line</td>
<td>12%</td>
</tr>
<tr>
<td>WeChat</td>
<td>13%</td>
</tr>
</tbody>
</table>

- **Vietnam Social Network**
- **Ecomobi**: Do the right thing
## Vietnam Social Network

### Facebook user profile by age and gender

<table>
<thead>
<tr>
<th>Age</th>
<th>Total</th>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>46,000,000</td>
<td>48%</td>
<td>52%</td>
</tr>
<tr>
<td>13-17</td>
<td>7,200,000</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>18-24</td>
<td>15,290,000</td>
<td>16%</td>
<td>17%</td>
</tr>
<tr>
<td>25-34</td>
<td>14,960,000</td>
<td>16%</td>
<td>17%</td>
</tr>
<tr>
<td>35-44</td>
<td>5,430,000</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>45-54</td>
<td>1,940,000</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>55-64</td>
<td>770,000</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>65+</td>
<td>320,000</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
06 | VIETNAM E-COMMERCE
Advertising channels that people first learned of their purchased product

- **Poster**: 6%
- **Magazine/ Newpaper**: 6%
- **Instore Ads**: 12%
- **Television**: 24%
- **Online**: 43%

Base: Internet users, n=949
Vietnam E-commerce Estimation 2017

- Total value of national E-commerce market in 2016: 1,8 billions USD
- Estimated Revenue in 2017: 2,187 millions USD
- Estimated User penetration: 50.5%
- Estimated Average revenue per user (ARPU): 61.74 USD
Vietnam E-commerce

Demographics

By Age

- 18-25: 34%
- 26-30: 30%
- 30-35: 18%
- 35+: 15%
- Under 18: 3%

By gender

- Male: 36%
- Female: 64%
Vietnam E-commerce

Demographics

By location

Others 39%
Hai Phong 1%
Da Nang 3%
Can Tho 3%
Ha Noi 17%
HCM 38%

Ha Noi and HCM are the most two potential market for E-commerce
The people who have great demand for buying online are office workers.
In which part of the purchase process did people use the Internet?

- Prepared online for immediate offline purchase: 53%
- Sought advice online: 51%
- Compared choices online: 65%
- Look for early inspiration and made initial discoveries online: 50%
How did people first learn of the product they purchased during product research?

- **Online via website or app**: 37%
- **In a store, shop, showroom**: 52%
- **Over the phone**: 4%
- **Other**: 7%

Base: Internet Users, n=933
Vietnam E-commerce

User Behavior

What online sources did people use to make a purchase decision?

- Online search on brand websites: 36%
- Online research on retailer websites: 27%
- Social networks: 26%
- Online video sites: 17%
- Advice sites/review sites/forums/blogs: 12%

Base: Internet User, n=6515
How did people first hear about the product they bought?

- Previous experience: 40%
- Discussion with other people: 25%
- Pre-purchase research: 13%
- Through advertising: 12%
- Other: 8%

Base: Internet user, n=6515
Vietnam E-commerce

User Behavior

How did people use the Internet to help make their purchase decision?

- Watched relevant video online: 19%
- Checked for/redeemed offers, coupons or promotion online: 23%
- Got location/direction online: 29%
- Checked where to buy/product availability online: 30%
- Looked for opinions/reviews/advice online: 39%
- Discovered relevant brands online: 39%
- Compared products/prices/features online: 61%

Base: Internet Users, n=5749
The frequency of online shopping

- Once/week or more: 23%, 25%, 22%
- Once/month: 27%, 26%, 27%
- Once/2-3 months: 15%, 9%
- Once/6 months: 7%, 9%, 4%
- Less than once/6 months: 28%, 32%, 24%

Base: Consumers, Age: 18-39, n=500, location: HCM- HN
Vietnam E-commerce

User Behavior

Purchased products on EC

- Fashion: 46%
- IT/ Mobile phones: 39%
- Kitchen/home appliances: 35%
- Food/Beverage: 22%
- Books/Stationeries: 20%
- Cosmetics: 20%
- Sport goods: 13%
- Ticketing: 9%
- SPA/Beauty services: 7%
- Supplement/Functional: 6%
- Music/Video: 5%
- Flowers/plants: 3%

Base: Consumers, Age: 18-39, n=500, location: HCM- HN
Vietnam E-commerce

User Behavior

Product purchase on EC by age

Base: Consumers, Age: 18-39, n=500, location: HCM- HN
Product purchase on EC by gender

- **Fashion**: 53% (Female) vs 54% (Male)
- **IT/Mobile phones**: 41% (Female) vs 42% (Male)
- **Food/ Beverage**: 32% (Female) vs 38% (Male)
- **Books/ Stationeries**: 19% (Female) vs 26% (Male)
- **Cosmetics**: 23% (Female) vs 23% (Male)
- **Sport goods**: 34% (Female) vs 18% (Male)
- **Ticketing**: 9% (Female) vs 9% (Male)
- **SPA/ Beauty services**: 14% (Female) vs 7% (Male)
- **Supplement/Functional**: 7% (Female) vs 6% (Male)
- **Music/ Video**: 4% (Female) vs 6% (Male)
- **Flowers/ plants**: 3% (Female) vs 3% (Male)

Base: Consumers, Age: 18-39, n=500, location: HCM- HN
Appendix: Reference Source

1. Internet Users by country 2016, Internet Live Stats, 2016.
2. Vietnam Age Struture, Indexmudi, 2016
3. Digital 2017: Southest Asia, We are Social, 2017.
4. Consumer Barometer, Google, 2017
5. Statista
9. Others
CONTACT

NGUYEN XUAN DONG
VICE MANAGING DIRECTOR
(+84) 989.995.145
dongnx@ecomobi.com

Singapore
Address: 18 Boon Lay Way #05-95 Trade hub 21 Singapore.

INDONESIA
Address: Gedung Grand Slipi Tower Level 9G Palmerah, Jakarta Barat.

VIETNAM
– HA NOI: 99 Me Tri St, Me Tri Ward, Nam Tu Liem Dist, Hanoi.
– HO CHI MINH: 133 Duong Ba Trac St, 8 Dist, HCM City.

Website: www.ecomobi.com