

# MEDIA LANDSCAPE

## 2022 UPDATE

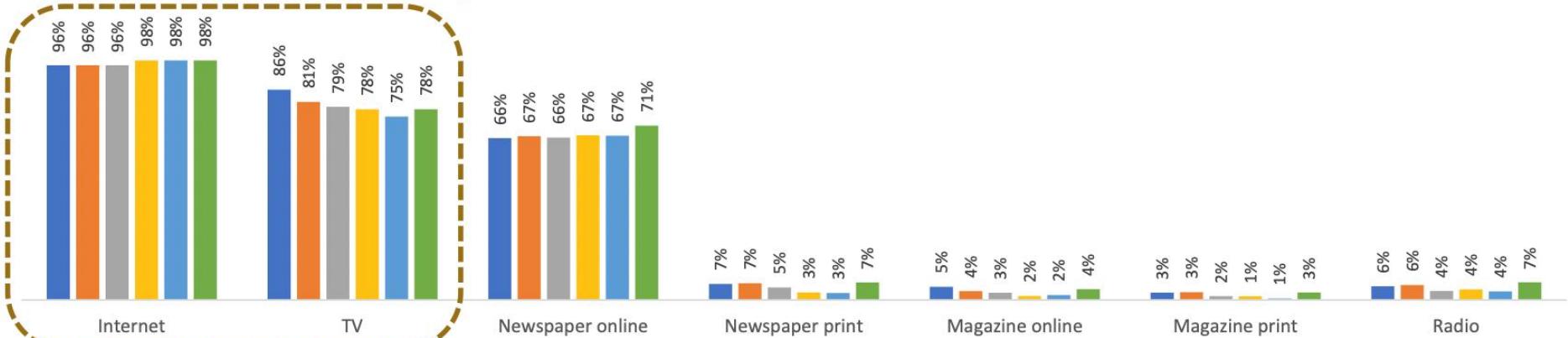


# MEDIA CONSUMPTION STATISTICS OVERVIEW

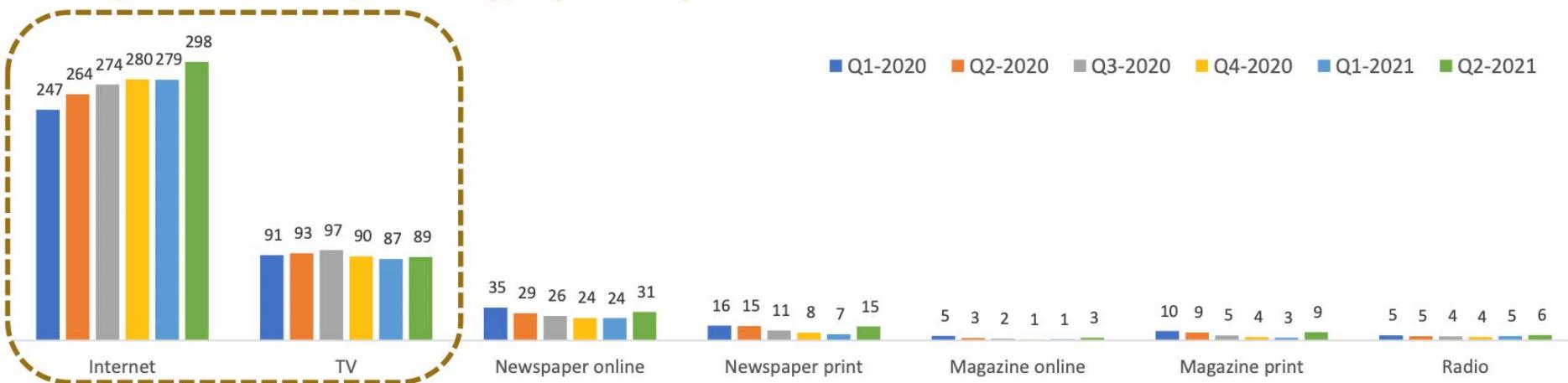
**TV** and **Internet** are 2 top-ranked media type in terms of usage.

Print newspaper, print magazines and radio account for a small proportion and generally tend to decrease.

**Media type that used yesterday**



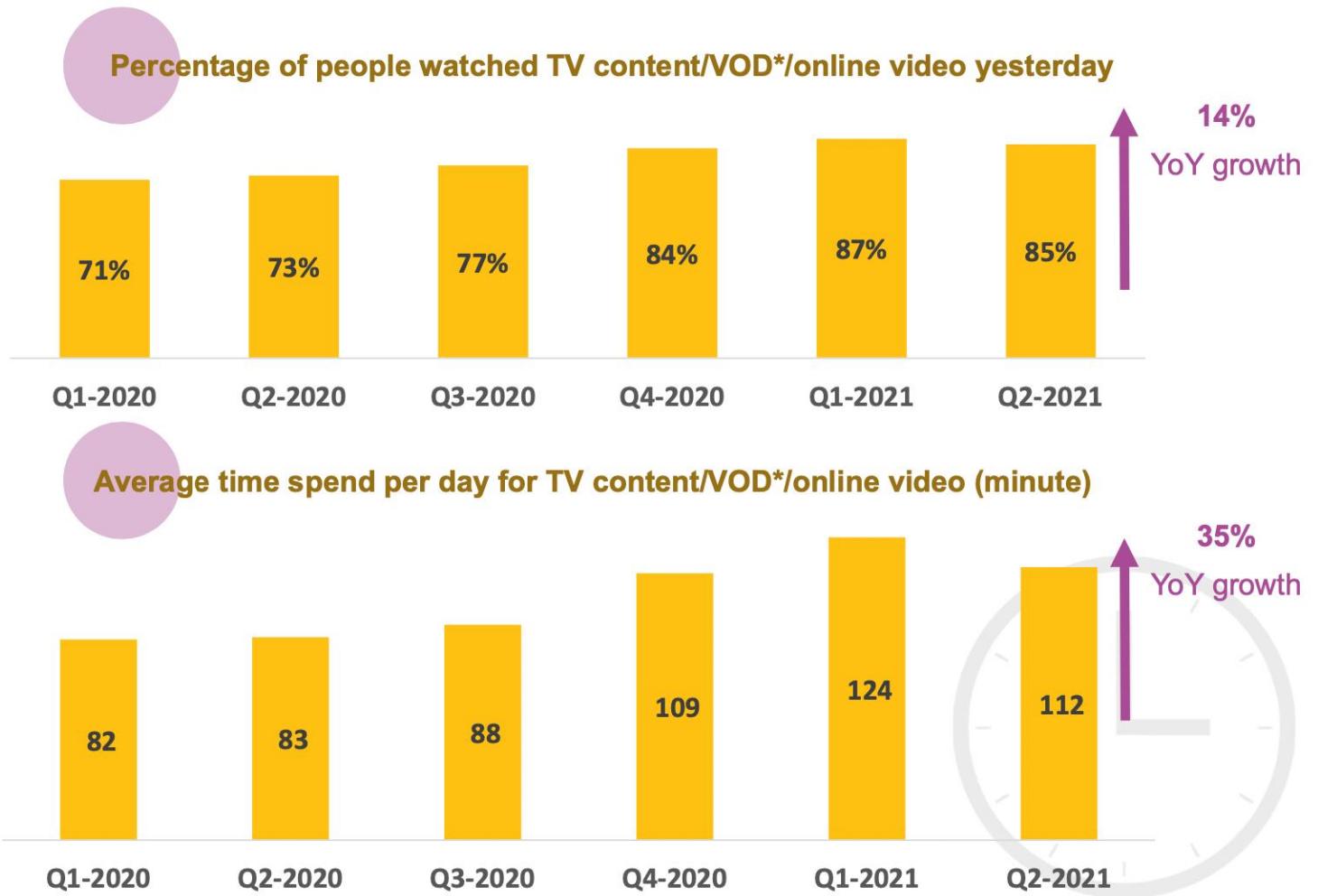
**Average time spend by media type (minutes)**



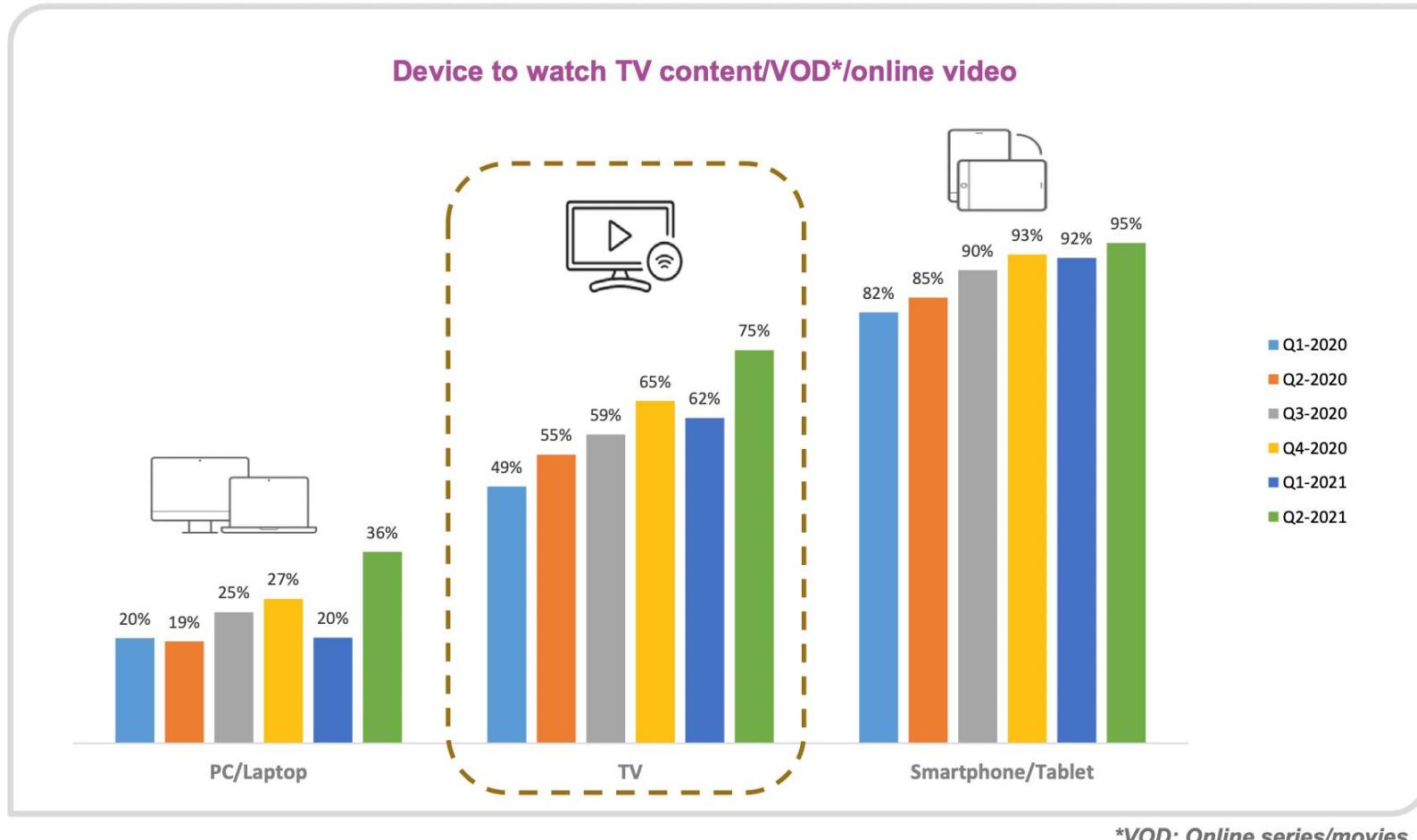
# THE GROWTH OF TV CONTENT/VOD\*/ONLINE VIDEO in terms of user and time spend



\*VOD: Online series/movies

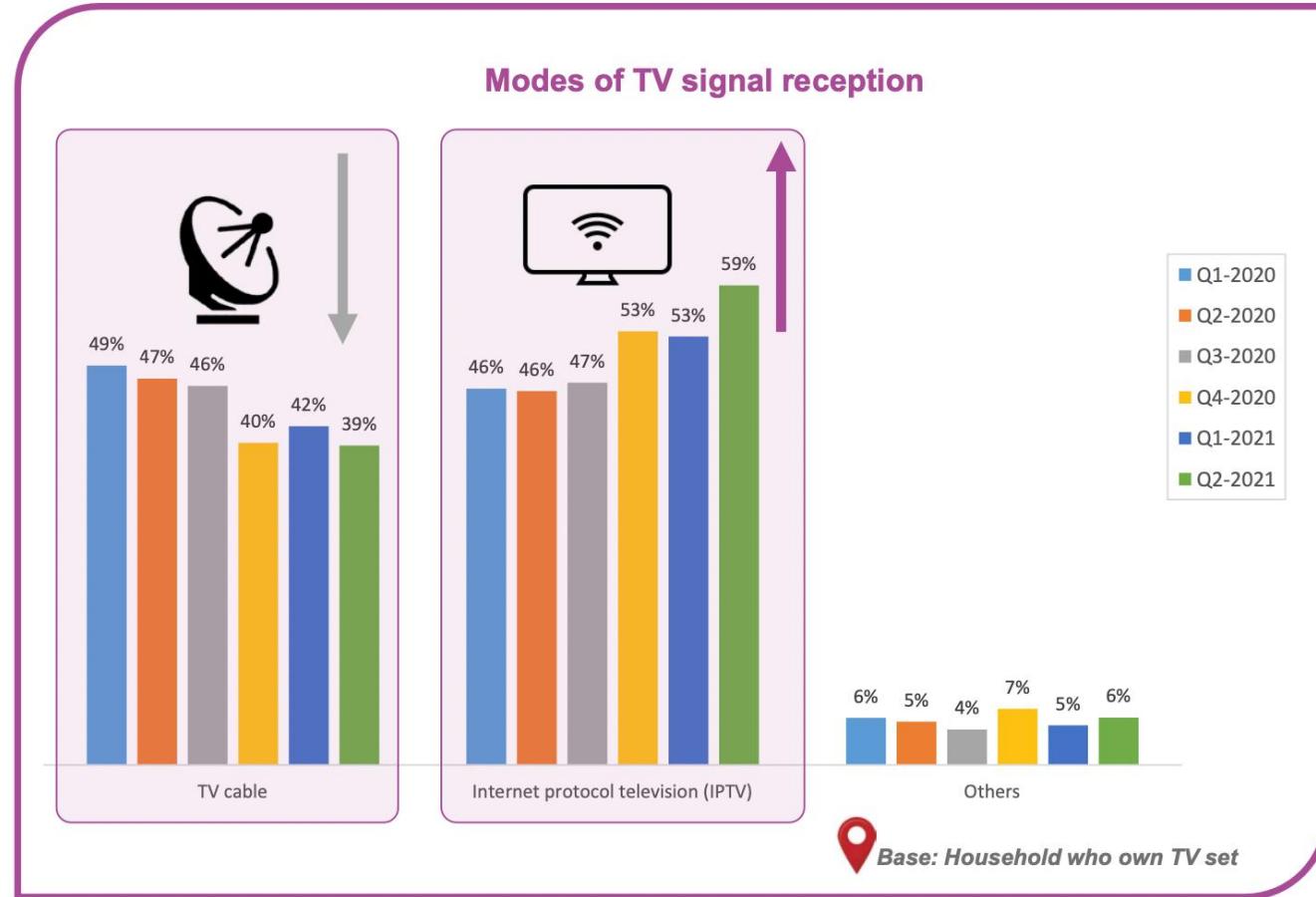


# After Smartphone/Tablet, TV SCREEN BECOMES FAVORITE DEVICE FOR WATCHING TV CONTENT/VOD\*/ONLINE VIDEO



# Households connected TO TV CABLE HAVE DECREASED, while IPTV KEEPS INCREASING

- **Internet TV** became the new trend in many household.
- Households connected to TV cable have decreased, while IPTV keeps increasing.

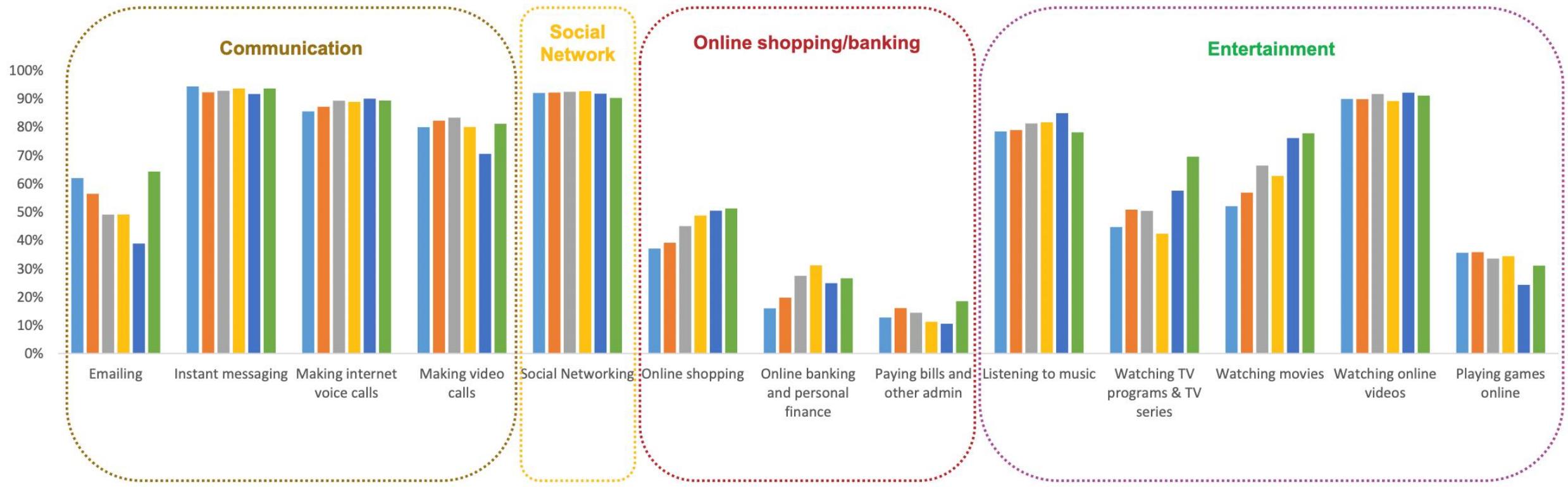


# WHAT PEOPLE ARE ACTUALLY DOING ON THE INTERNET

The pandemic has accelerated the shift towards a more digital world and triggered increase in COMMUNICATIONS/ENTERTAINMENT AND ONLINE SHOPPING.

Top purposes of using internet by any devices

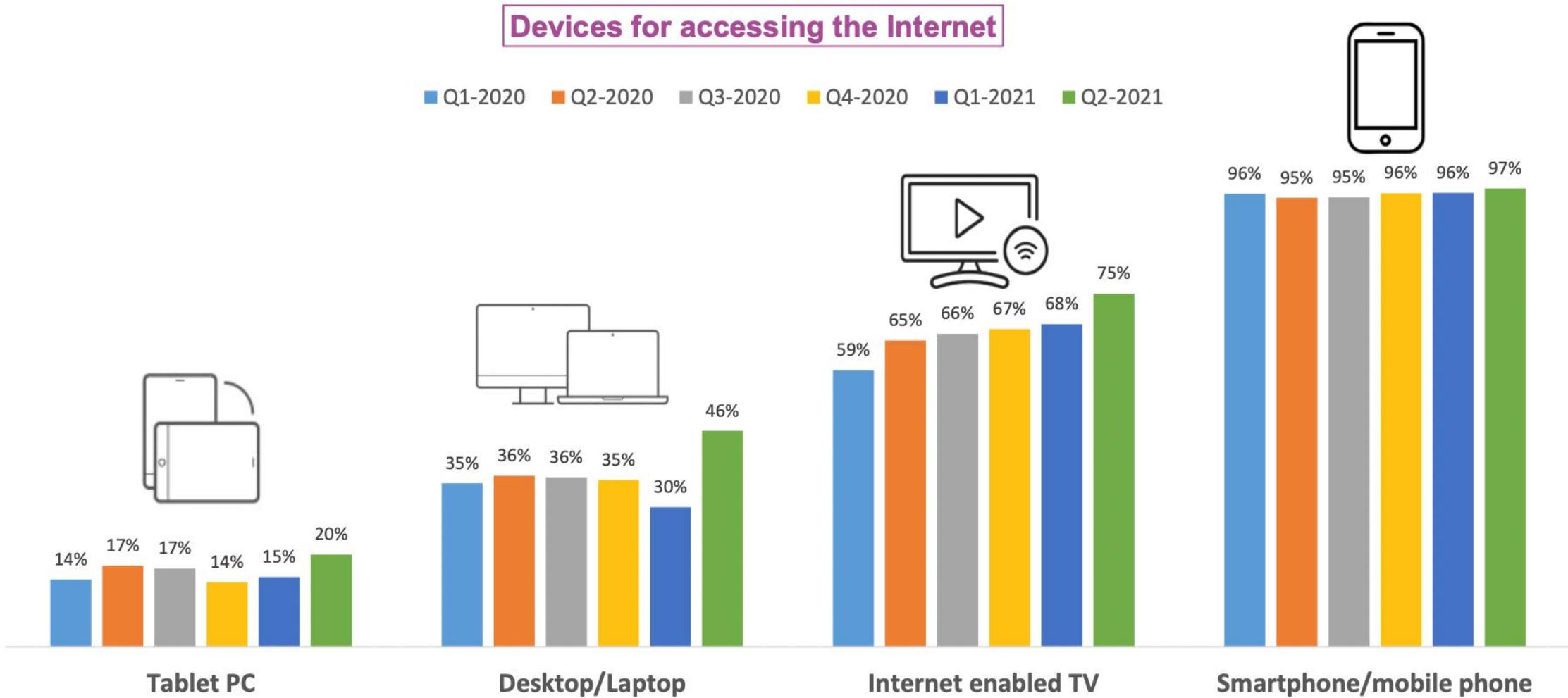
Q1-2020 Q2-2020 Q3-2020 Q4-2020 Q1-2021 Q2-2021



# WHICH DEVICES THEY USE

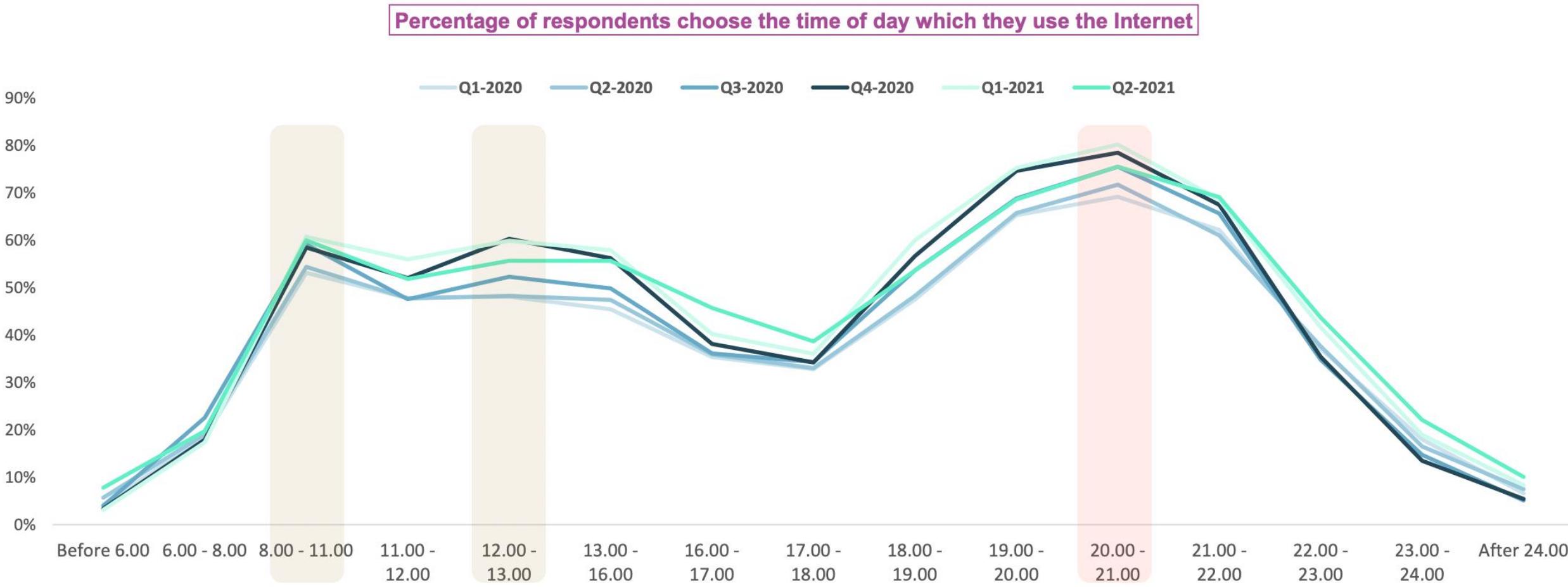
Smartphones become the most popular device used to access the internet.

While internet tv have pulled away from desktop/laptops to become the second popular device.



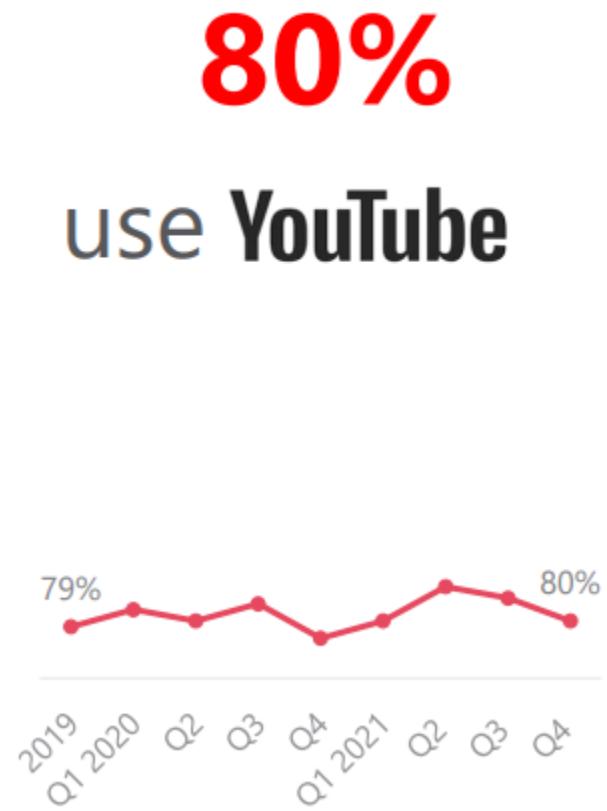
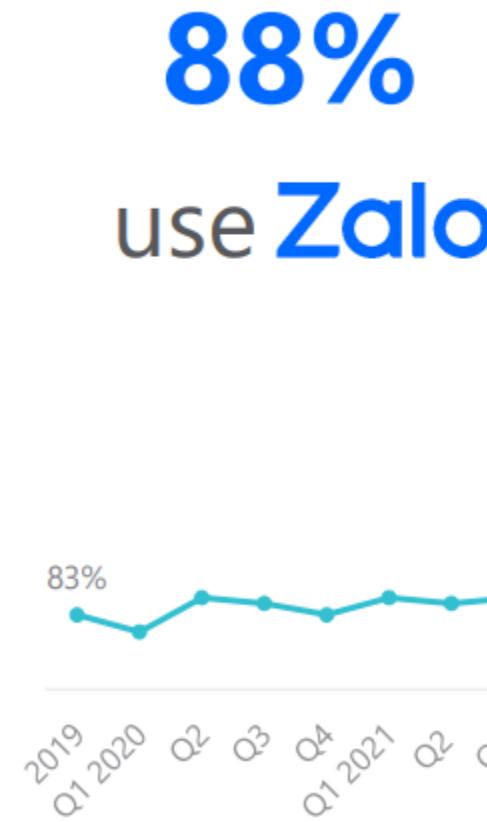
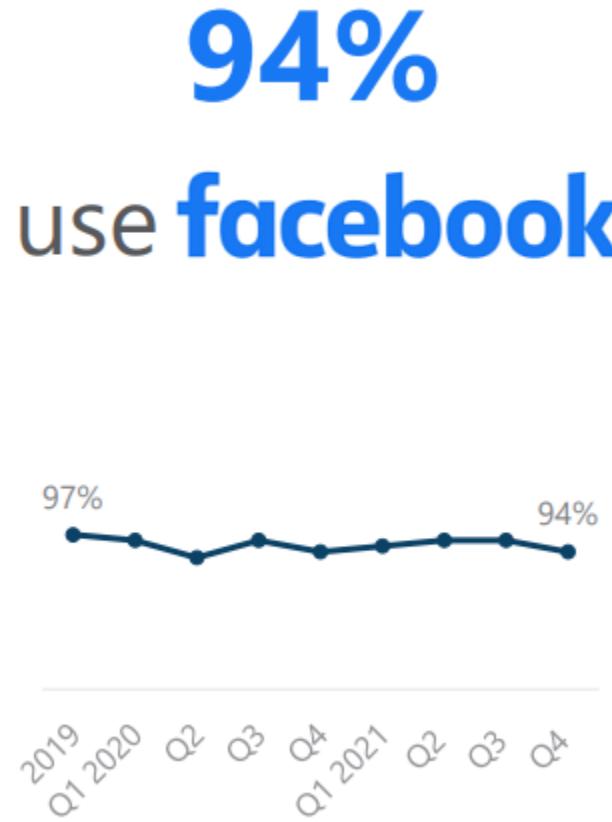
# WHEN IS THE PEAK HOURS OF VIETNAM INTERNET USERS?

There is not much different in the time of day to use the internet of people in 4 cities. It typically happens from 8-11 AM, 12AM-13PM and the peak falls to 8-9PM.



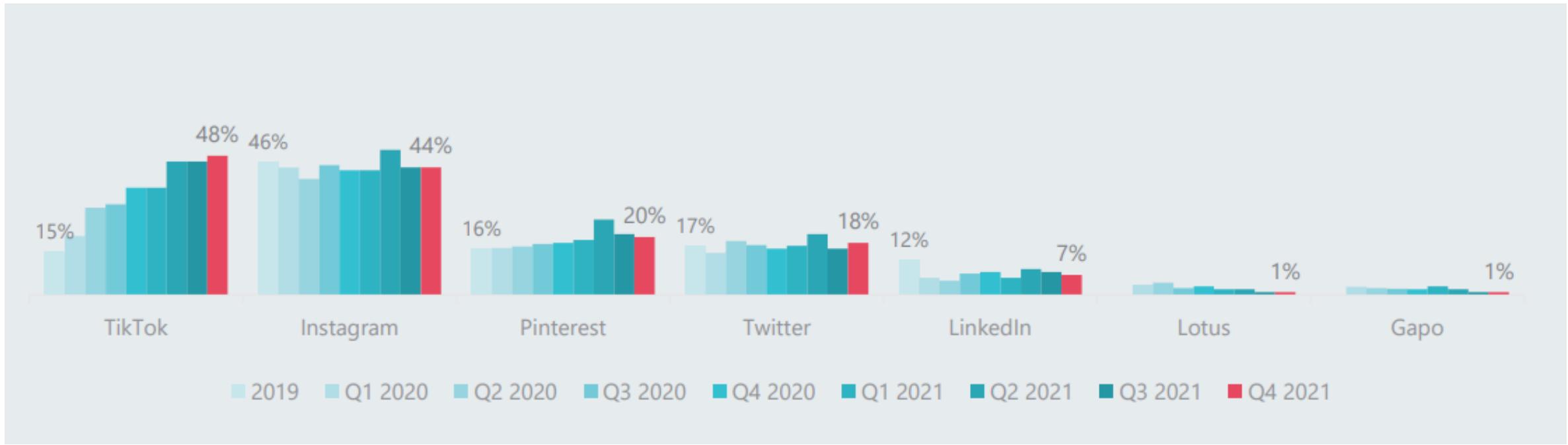
## TOP SOCIAL MEDIA PLATFORM

Facebook, zalo, and youtube remain the top 3 most popular social platforms in quarter 4/2021. Zalo experienced a 2%-point increase in popularity, while facebook & youtube saw slight dips.



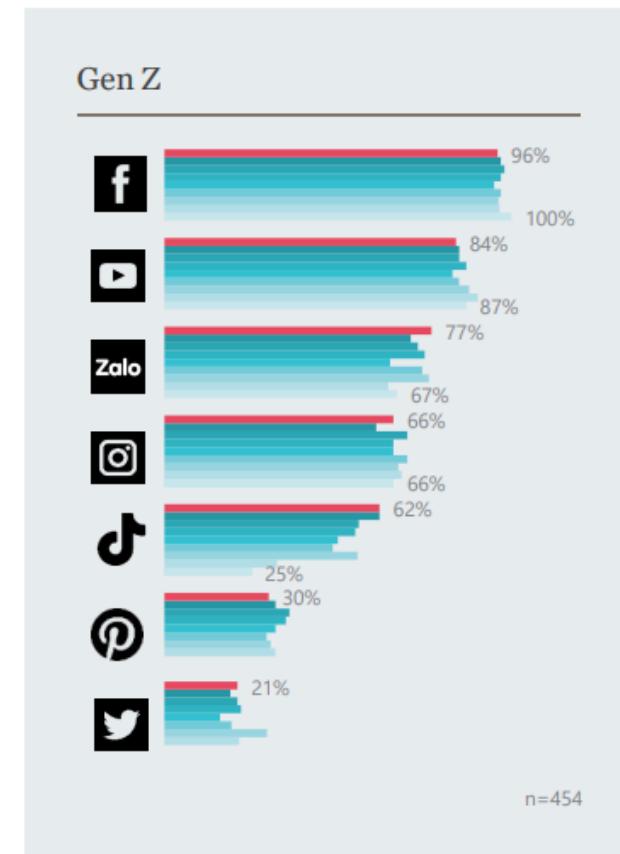
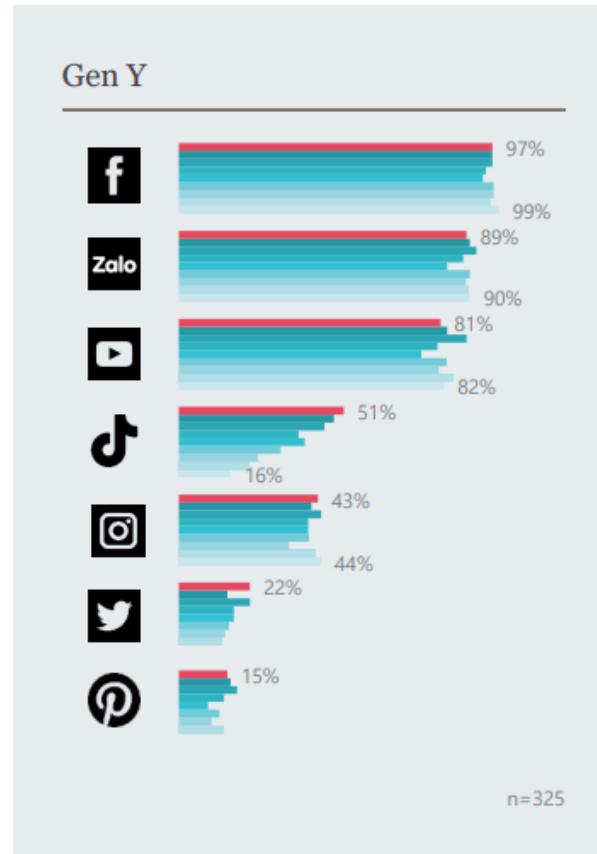
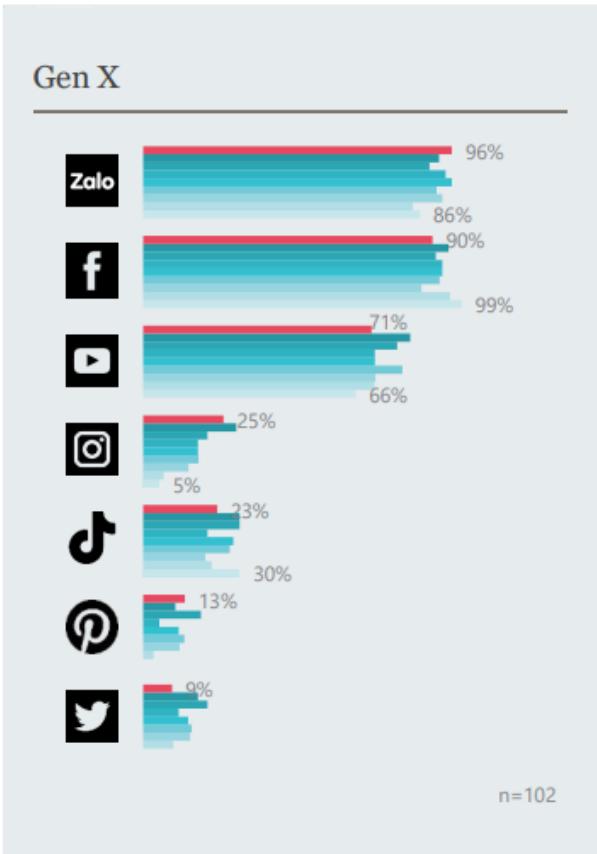
## OTHER POPULAR SOCIAL MEDIA PLATFORMS

Tiktok surpassed instagram for the first time as the fourth-most Popular social media platform in vietnam in Q4 2021



# SOCIAL MEDIA PLATFORMS IN GENERATIONS

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

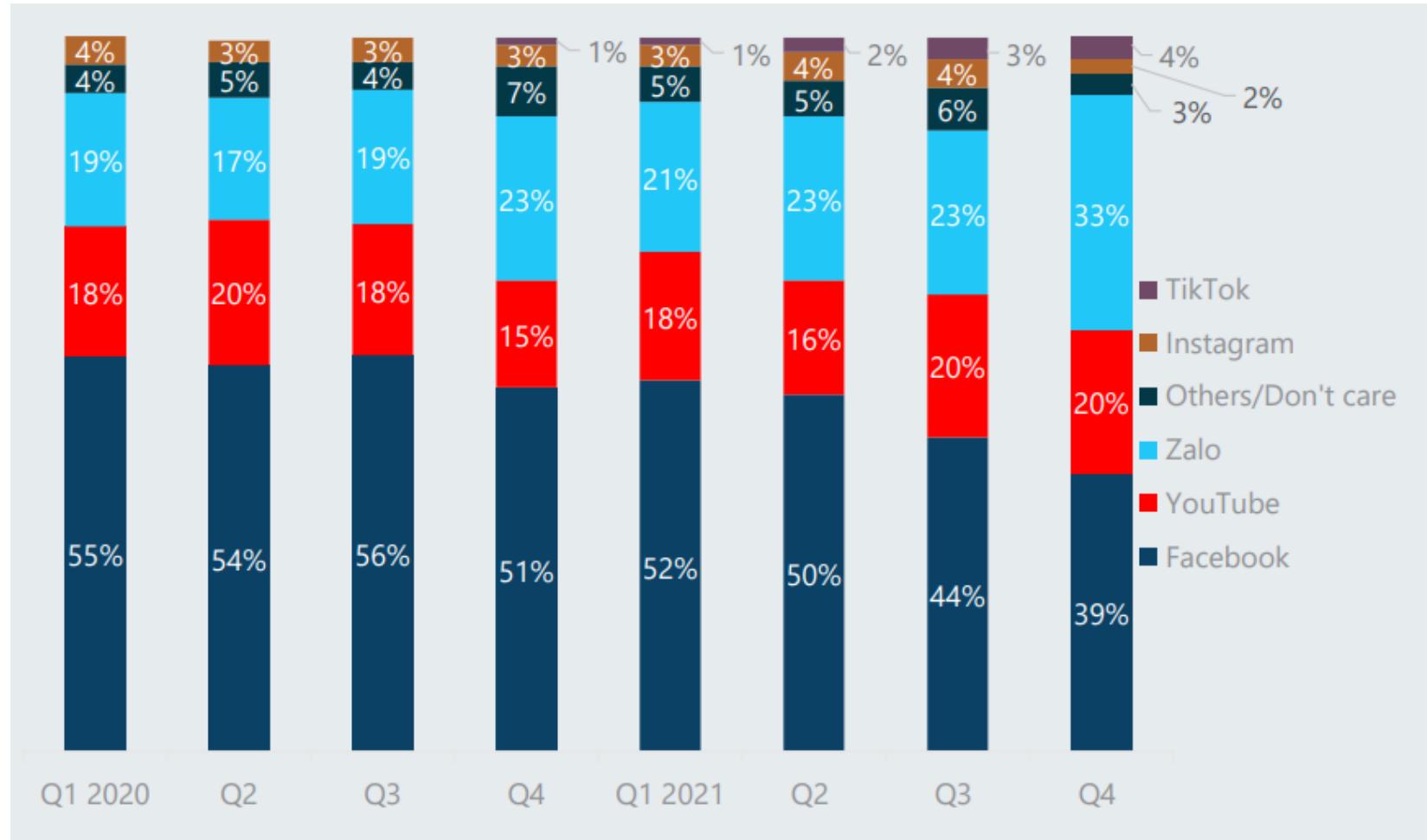


Q: Which of the following social media platforms are you using?  
(Choose all that apply)

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

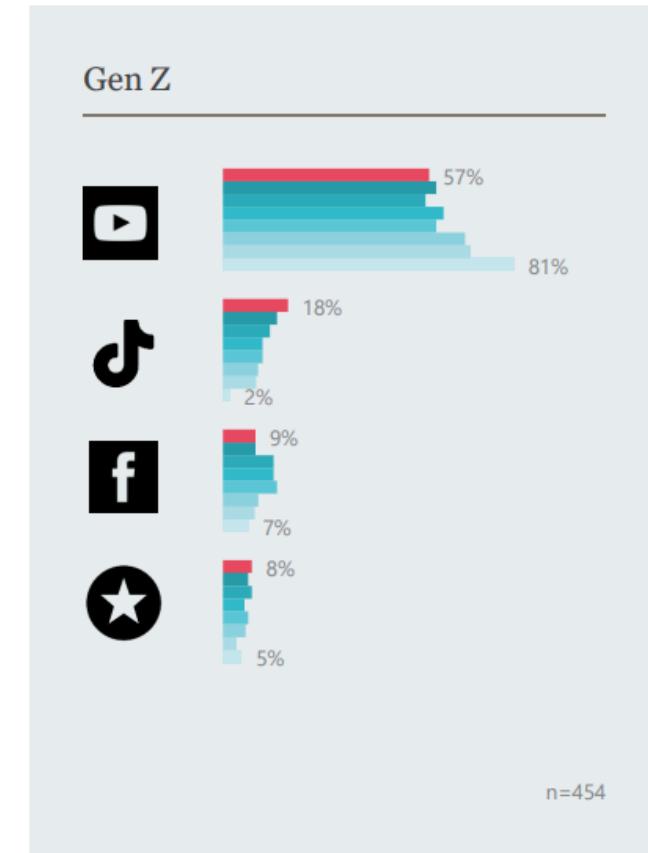
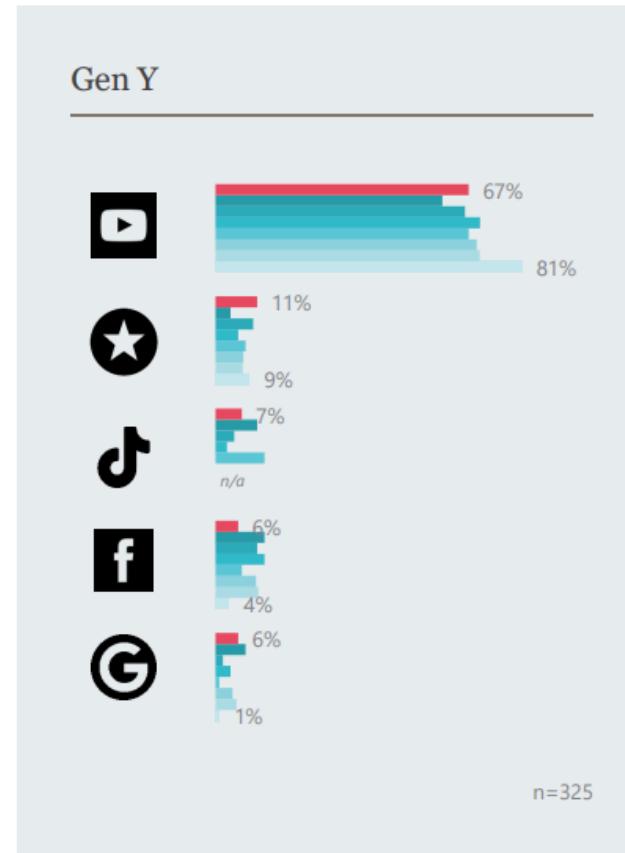
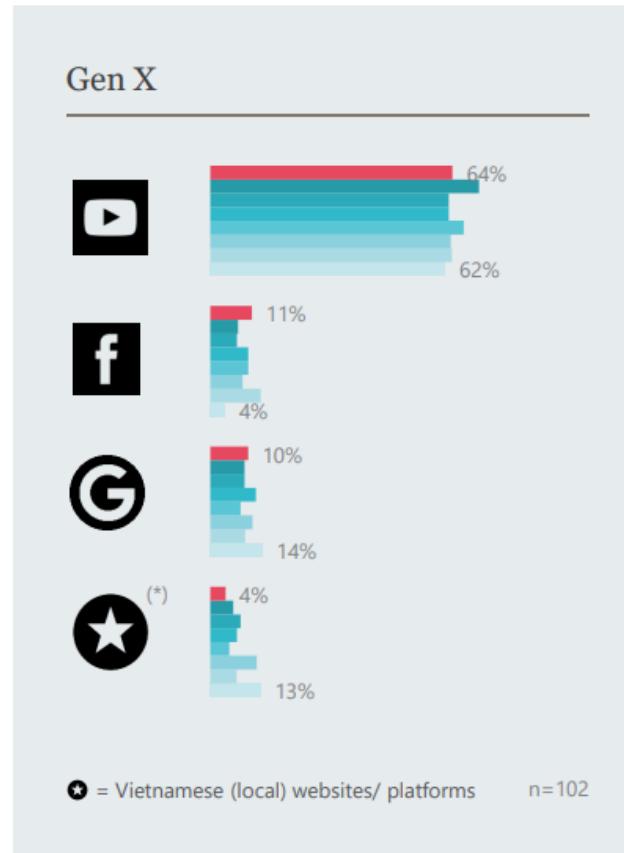
# PRIMARY APPLICATION

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



# TOP PLATFORMS TO WATCH MUSIC VIDEOS/ ENTERTAINMENT

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

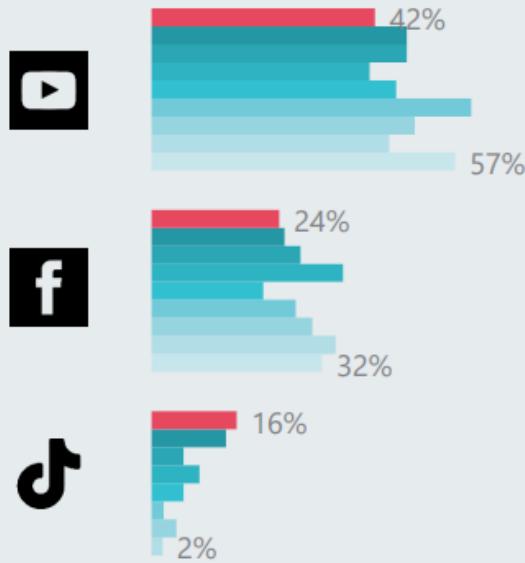


Q: Which platform do you go on most often when you want to watch music videos/entertainment videos?

# TOP PLATFORMS TO WATCH SHORT VIDEOS

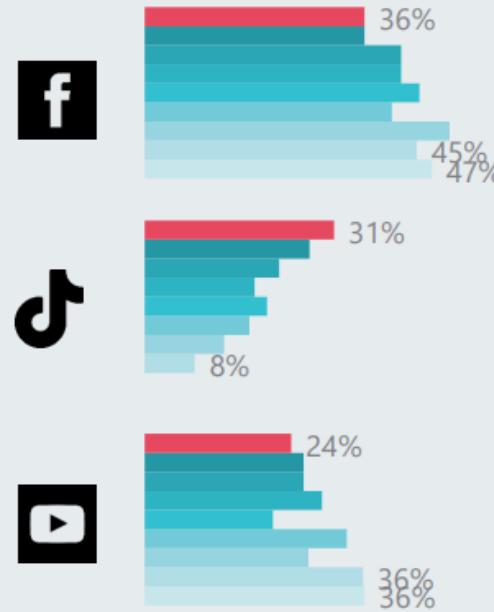
Tiktok's rise was driven by an overwhelming increase in popularity among Gen Z users and steady rises in the other age groups

Gen X



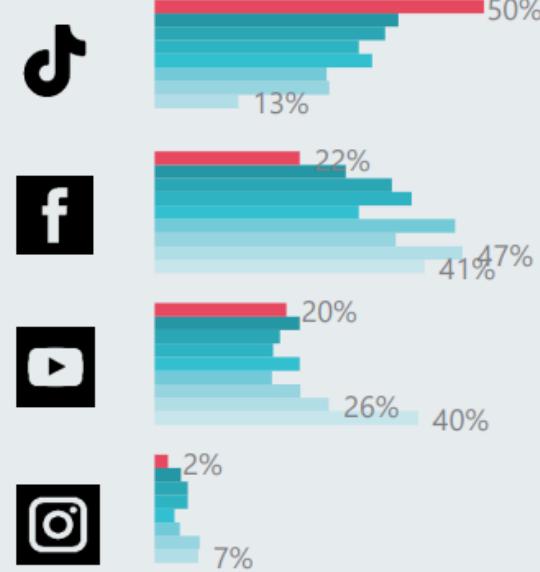
n=102

Gen Y



n=325

Gen Z



n=454

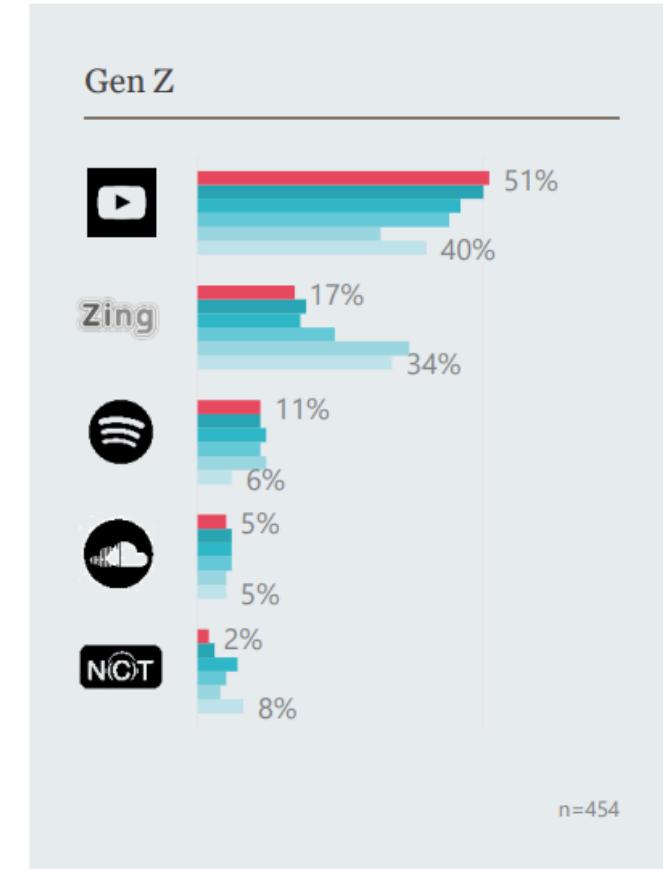
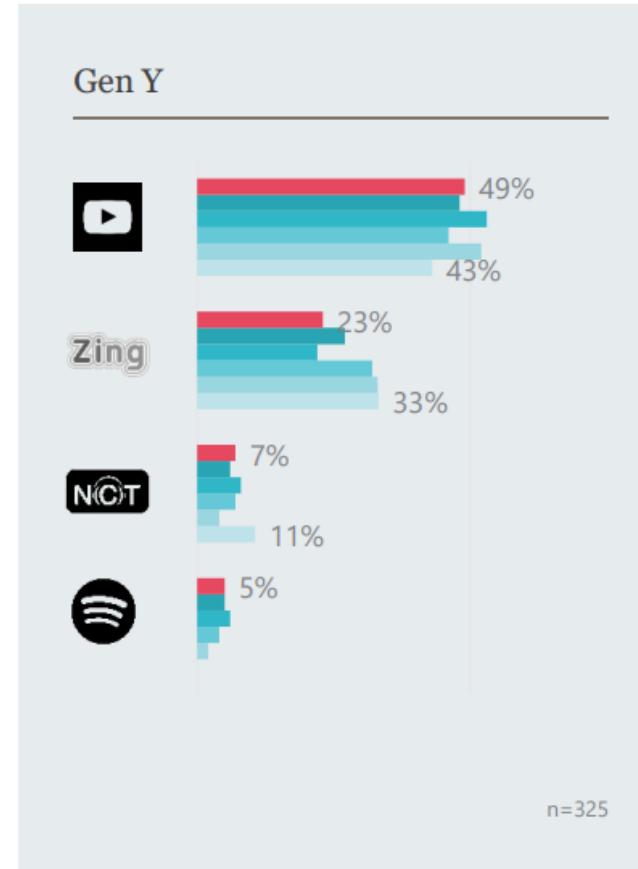
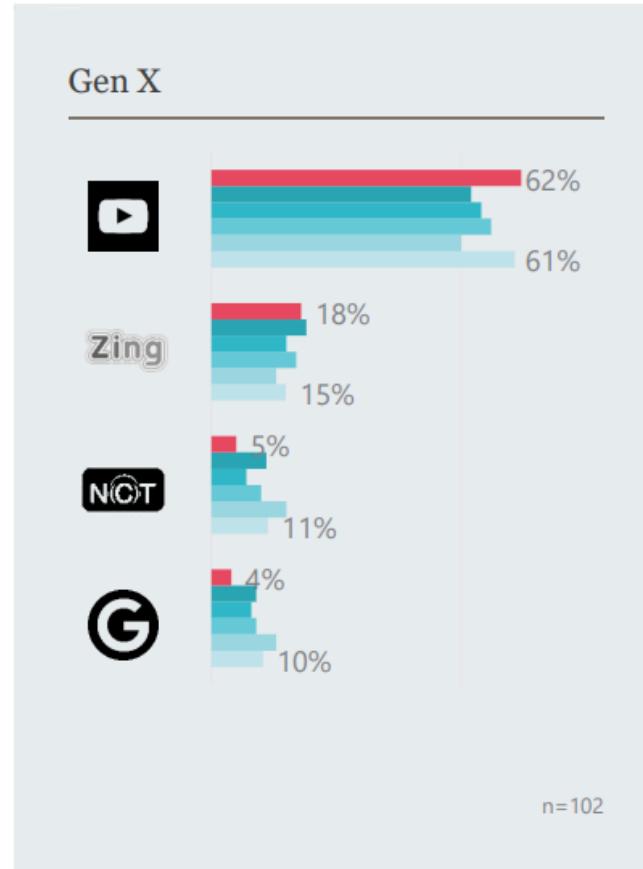
Q4 2021 n=881

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

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

# TOP PLATFORMS TO LISTEN TO MUSIC

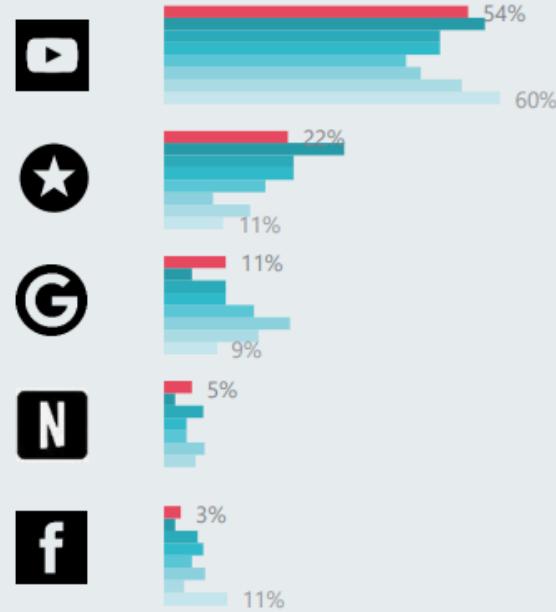
In the music streaming category, youtube made a recovery from last quarter's low among gen X consumers, while enjoying steady growth among other age groups.



# TOP PLATFORMS TO WATCH MOVIES

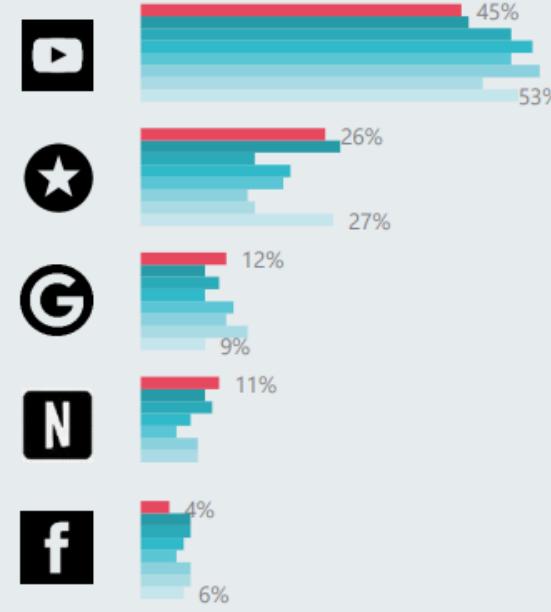
Youtube, local platforms and google search are the most popular platforms to watch movies.

Gen X



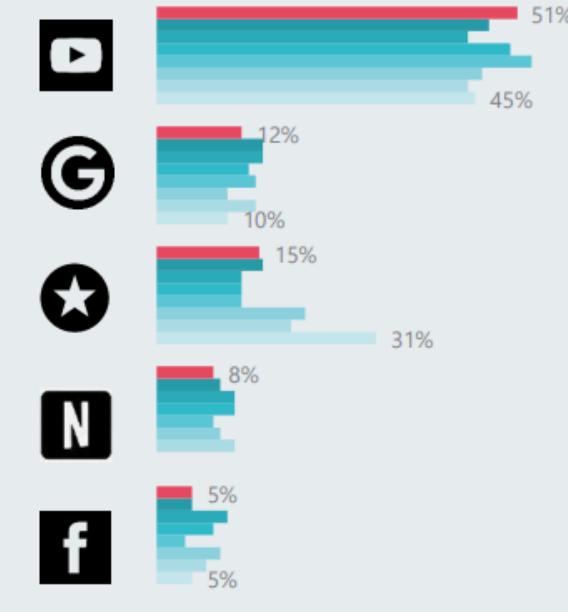
n=102

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Gen Z



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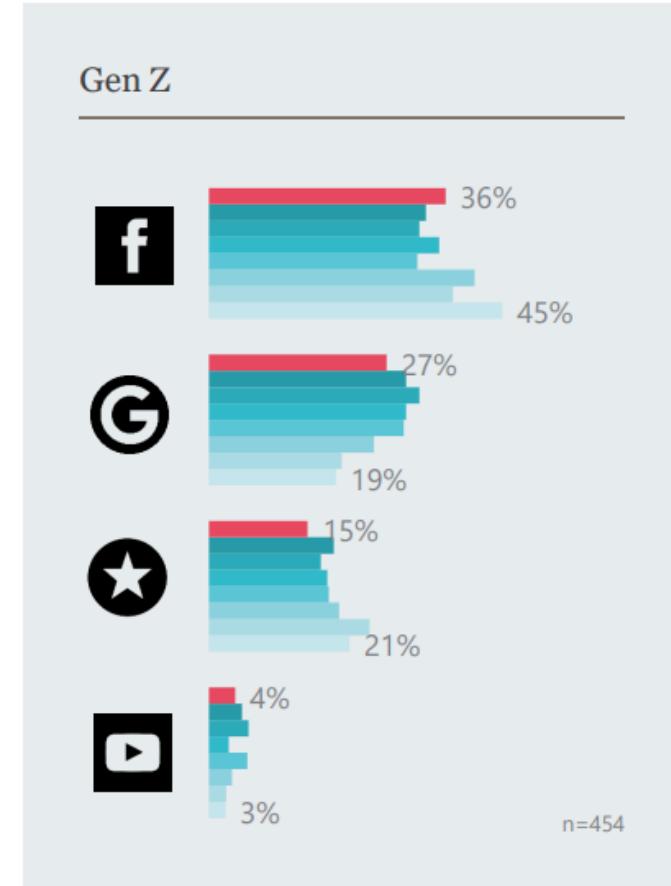
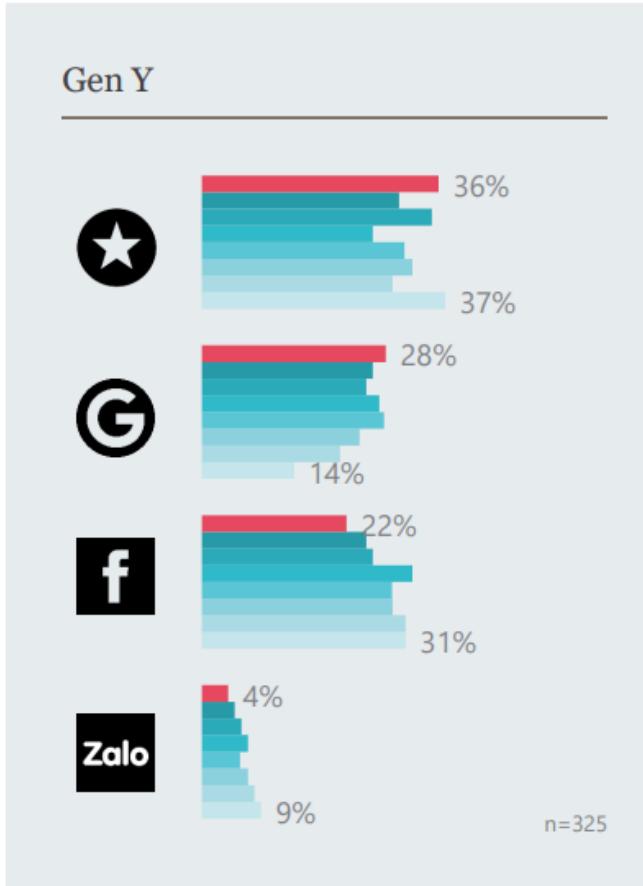
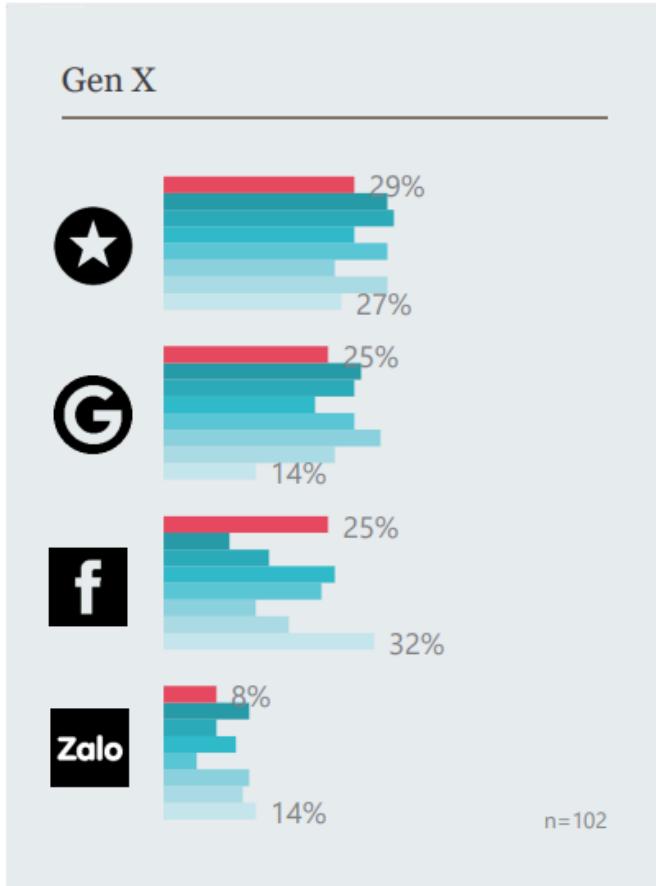
Q: Which of the following apps do you use most often to watch movies?

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

Q4 2021 n=881

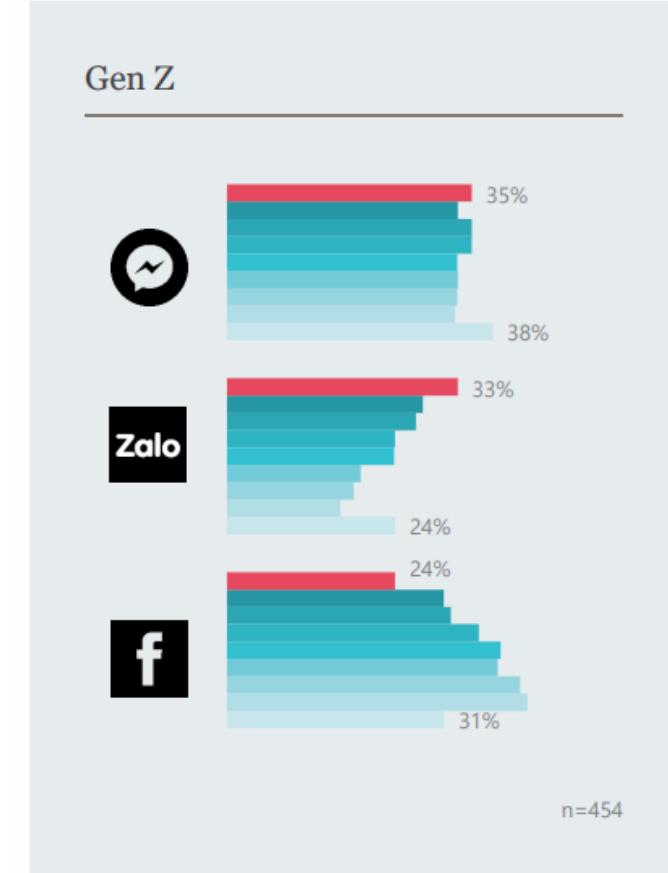
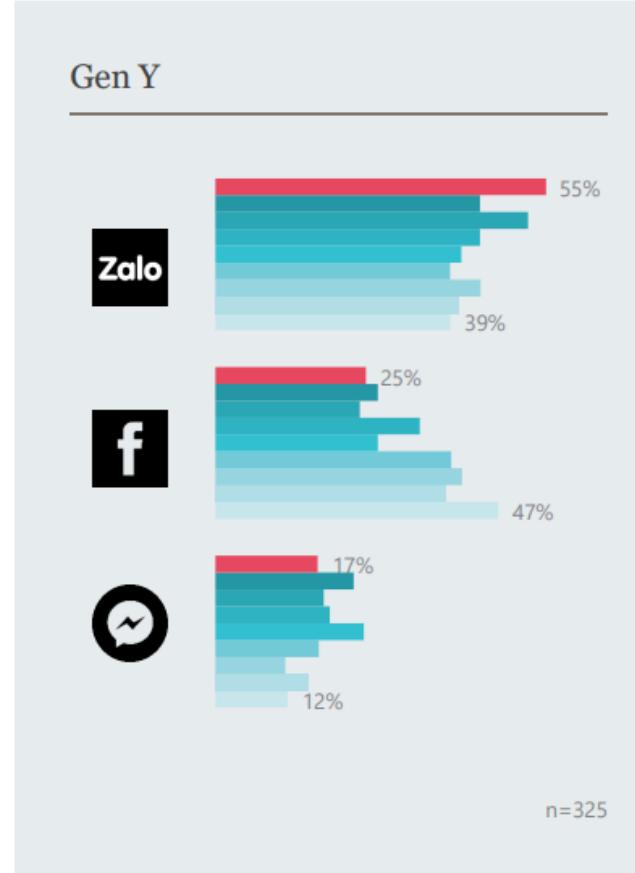
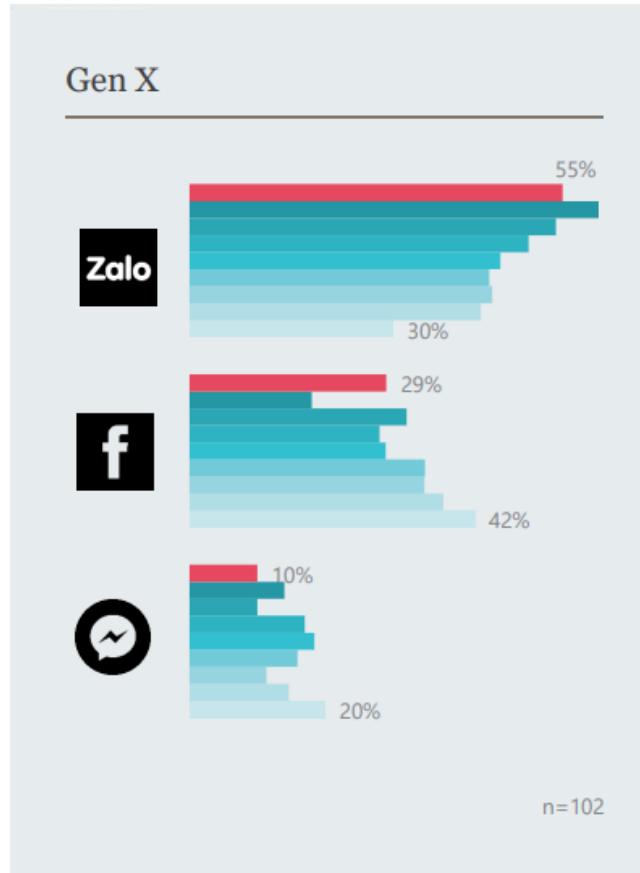
# TOP PLATFORMS TO GET NEWS IN GENERATIONS

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



# TOP PLATFORMS TO CONNECT WITH FRIENDS AND FAMILY

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



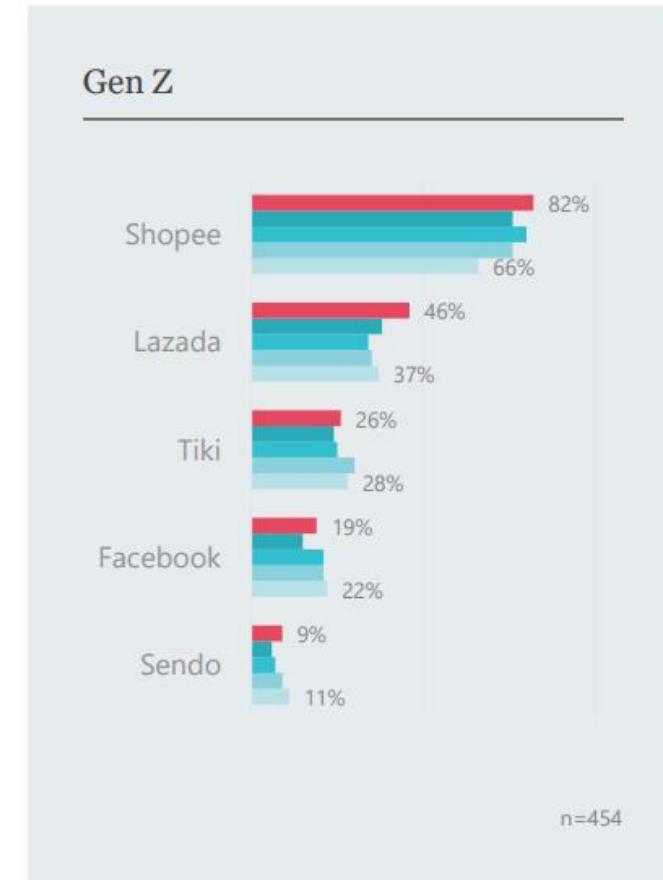
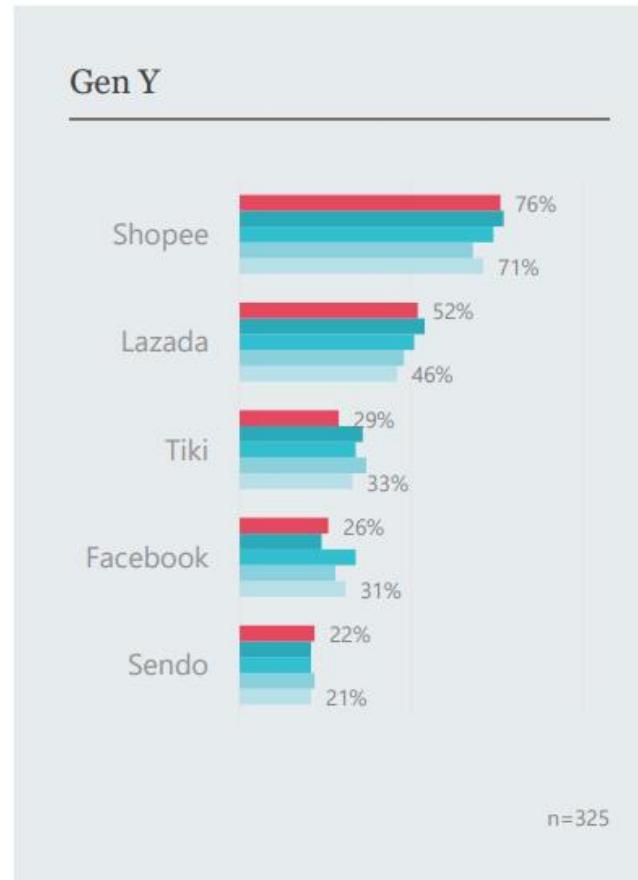
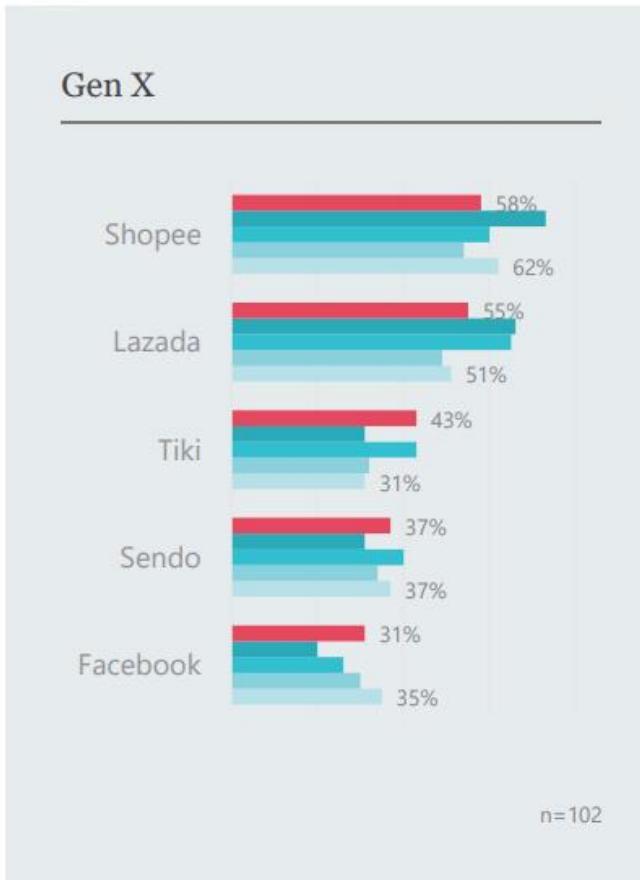
Q: Which of the following platforms do you use most often to connect with friends and family?

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

Q4 2021 n=881

# TOP E-COMMERCE PLATFORMS

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

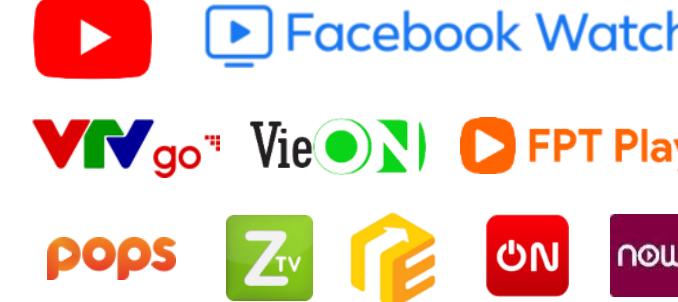


Q: Which of the following platforms/apps do you use for online shopping? Choose all that apply.

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

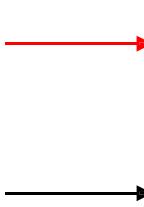
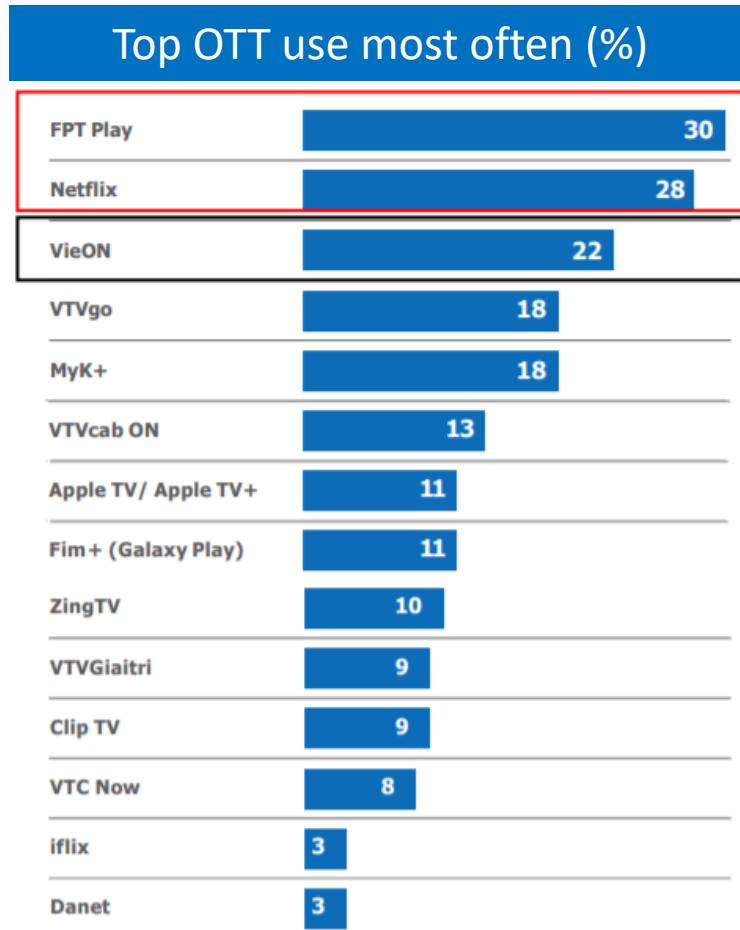
Q4 2021 n=881

# OVERALL OTT IN VIET NAM MARKET

	AVOD	SVOD
TV PROGRAMS	<p>Consumers are free to access these platforms in exchange of their exposure to advertisements.</p> 	<p>Consumers pay a small monthly fee to access these platforms and enjoy an adfree environment</p> 
ONLINE VIDEOS		

# OVERALL OTT IN VIET NAM MARKET

THE TREND OF HIGH-QUALITY, DIVERSE ENTERTAINMENT AND EXCLUSIVE CONTENT THAT COSTS LOW OR EVEN FREE HAS MADE OTT APPLICATIONS MAINTAIN THE HIGH CONSUMPTION TREND UNTIL NOW.



FPT Play is the most popular video streaming services in the market, following closely by Netflix

VieON has become more popular than ever with the attraction from hit movies such as Cay tao no hoa (Vietnam), Penthouse: Cuoc chien thuong luu (Korea), Truong Ca Hanh (China) and popular entertainment shows such as Rap Viet Mua 2, Running Man – Choi La Chay, etc.



# After Lockdown, we unlock

With the results from the 2020 post-Outbreak surveys in Vietnam and from the JCDecaux surveys, traffic in 2 key cities will return to 95% of normal within 2 months.

## 01 Traffic

95% traffic bouncing back in post-pandemic in 2 key cities

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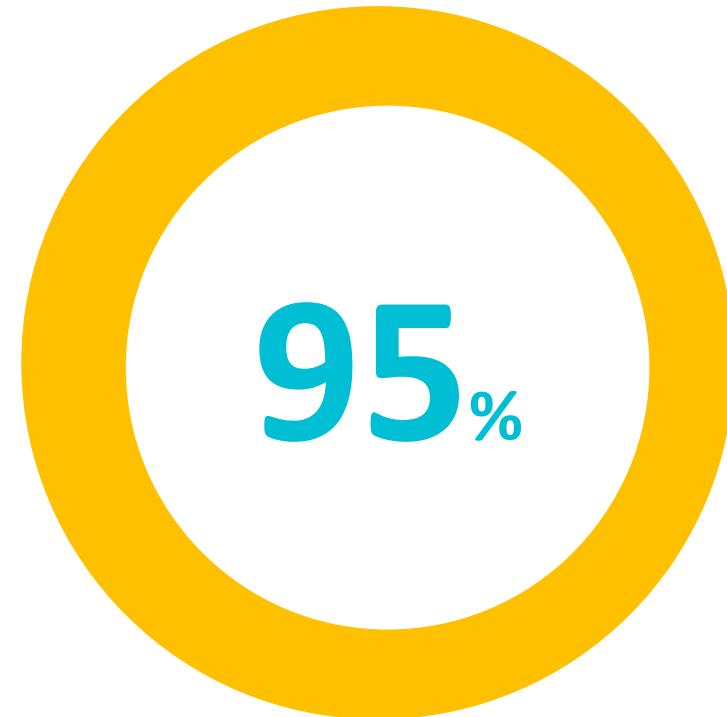
## 02 Occupancy

65% billboard/unipole will be occupied  
SoV is likely to increase

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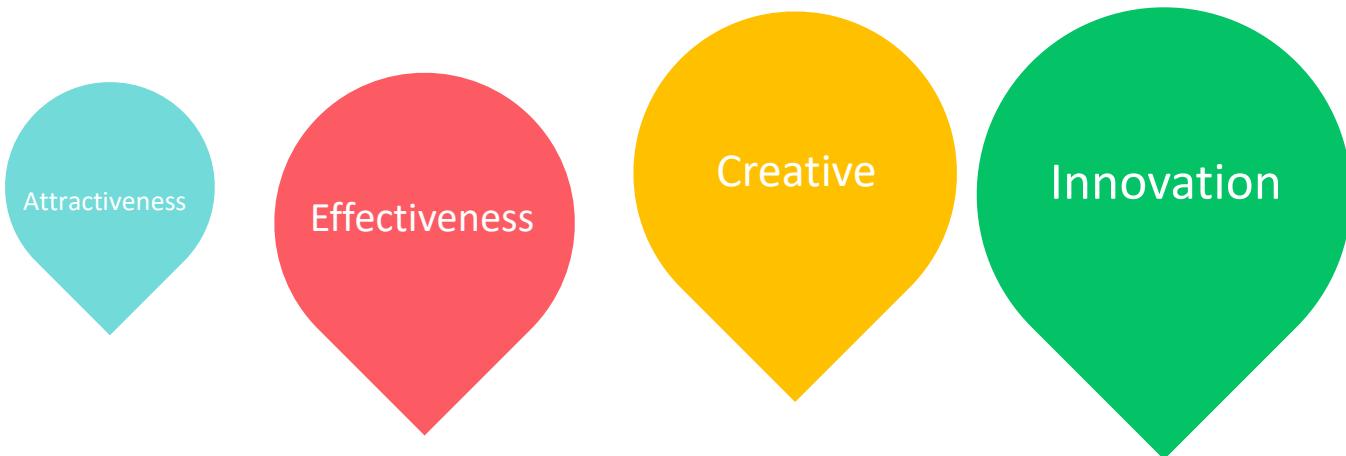
## 03 Support

More support from DVOOH for the cost portion, added value.



# OOH | LANDSCAPE

## Disruptive Creative Relevancy



OOH is growing and being invested by more format, more creativity and more innovative. Software and automation are increasing efficiency and effectiveness.



## KEY FINDINGS

1. Facebook still dominates the market of social media in Vietnam and is followed closely by Zalo. Tiktok sees a significant growth with almost 2x the growth in less than a year.
2. OTT platforms have become more popular, especially after the Covid-19 lockdown.

## IMPLICATIONS

1. Keep YouTube to build maximize reach. Consider to increase investing on Zalo , maintain Facebook to enhance social engagements, banner adnetwork to enhance awareness and consideration & Tiktok to reach Gen Z.
2. Optimize room for content on OTT platform (VieON, FPT, Zing, etc). Evaluate the OTT landscape with an eye on digital audiences & follow brand strategy.