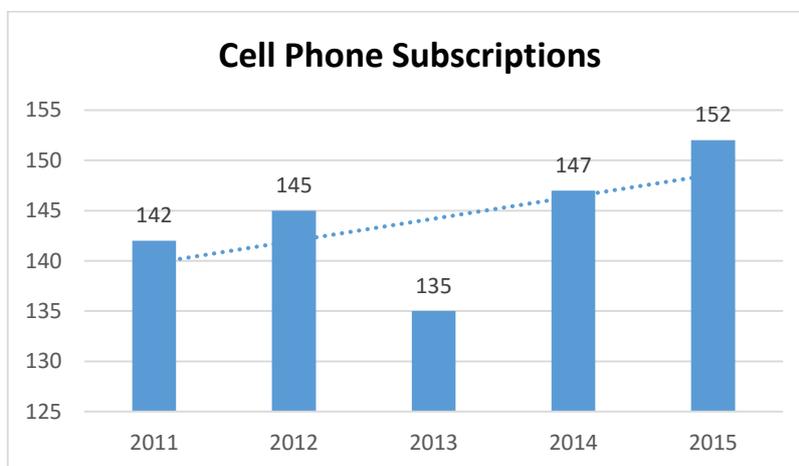


2016 Viet Nam Digital Assessment

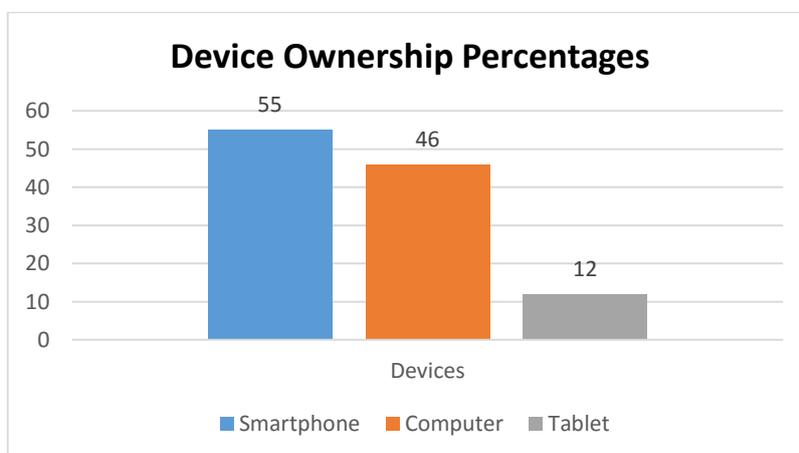
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The digital landscape across Viet Nam continues to grow and mature showing no signs of slowing. The following statistics tell more of the story as it relates to digital devices and subscriptions, internet and social media usage and online content and activities that are most popular among the Vietnamese. While the combined data here paints the fuller picture there are four critical takeaways from this assessments: **growth, mobile, social and consumption**. Cell phone and particularly smartphone ownership has not yet reached a saturation point so this market has grown and will continue to grow. While computers still account for a significant percentage of the internet access in Viet Nam, that share is declining as mobile internet access and mobile social media access is rapidly increasing. Social interaction is a critically important online activity for the Vietnamese and Facebook is holding strong as the leading platform for social media. Beyond social interaction or perhaps in tandem with that interaction the Vietnamese are steadily consuming online content centered in both news and information as well as entertainment. Each of these areas will be of key importance to media and marketing efforts.

Digital Devices and Subscriptions



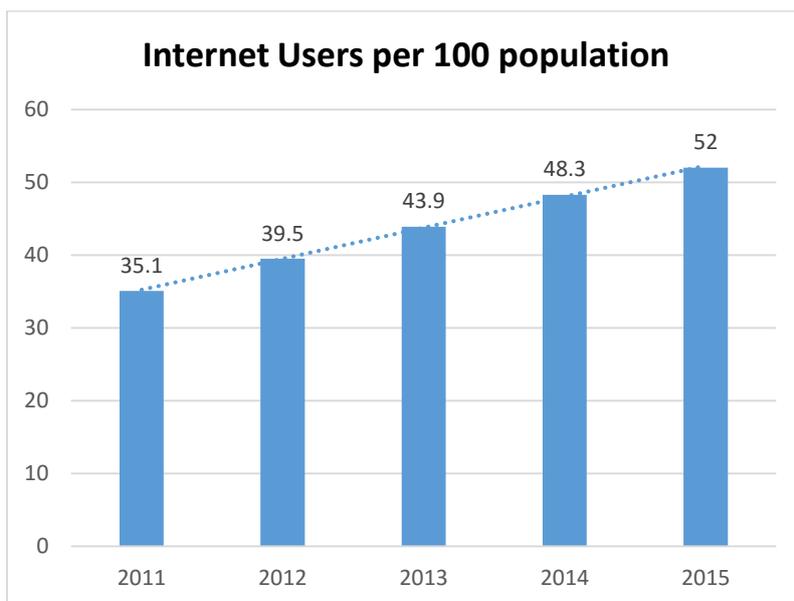
Overall cell phone subscriptions within Viet Nam have continued to steadily rise with 152 subscriptions per 100 in population as of 2015¹. The common practice for many Vietnamese to have multiple handsets and multiple phone subscriptions (typically as a means to save money by leveraging various discounts for texting and calls) brings the total number of cell phone subscriptions to 142.9 million. Unique individuals (users) of those subscriptions is equal to 63% of the population². Of these 142.9 million subscriptions a subset of 37 million or about 26% of those connections are mobile broadband (internet or data capable) connections³.



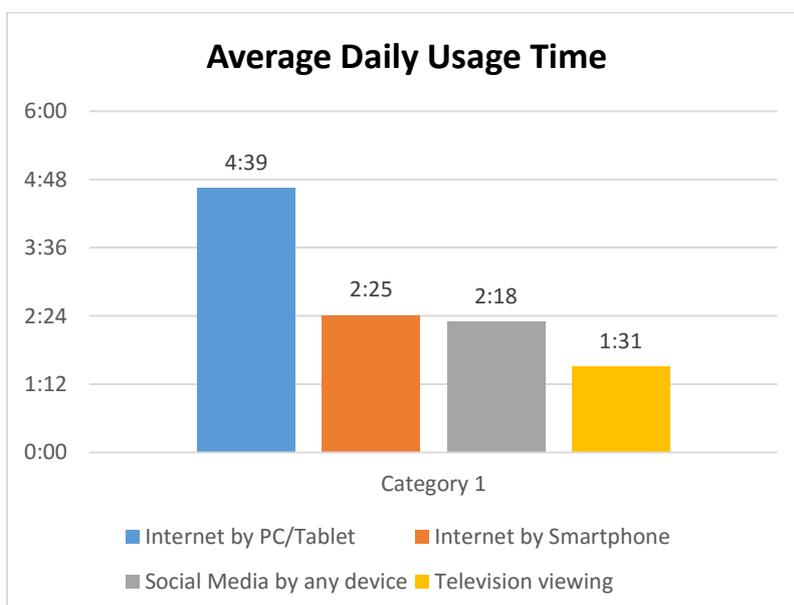
In asking the question, “Which of the following devices do you currently use?” slightly more than half of respondents indicated that they use a smartphone (55%) while 46% indicated they use a computer and 12% indicated they use a tablet⁴. Of course there is some overlap in this usage with some of the population owning or using multiple such devices and other portions of the population using none.

For telephone handsets (basic, feature or smartphones) the market is divided with Nokia handsets accounting for the largest percentage (around 30%, probably mostly basic or feature phones); followed by Samsung with 16% of the handset market and Apple at 15% of the same market. The remaining 39% of the handset market is divided into multiple smaller manufacturers. When examining just smartphones, the breakdown of operating systems is led by Android (44.2%) followed by Nokia S40 (19.3%); Windows (14.6%); and IOS (9.3%)⁵.

Internet and Social Media



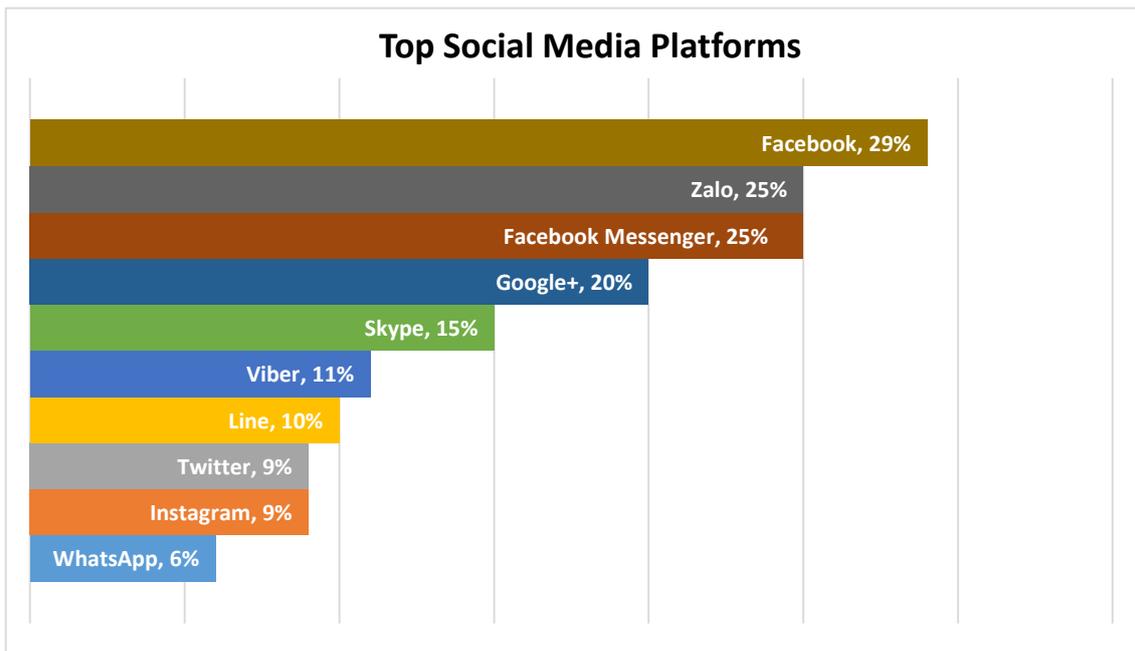
The continued growing trend of internet usage equating to roughly a 10% annual increase for the past 5 years brings the current number to 52% of the population of Viet Nam using the internet⁶. Usage by device type continues to be led by desktop and laptop computers with 71% of internet page views coming from these devices. However that is a 9% year on year decline for computers. Page views by mobiles is at 24% and rapidly increasing (40% year on year growth). Tablets account for only 4% of the web page views and slightly growing at a +4% year on year rate⁷.



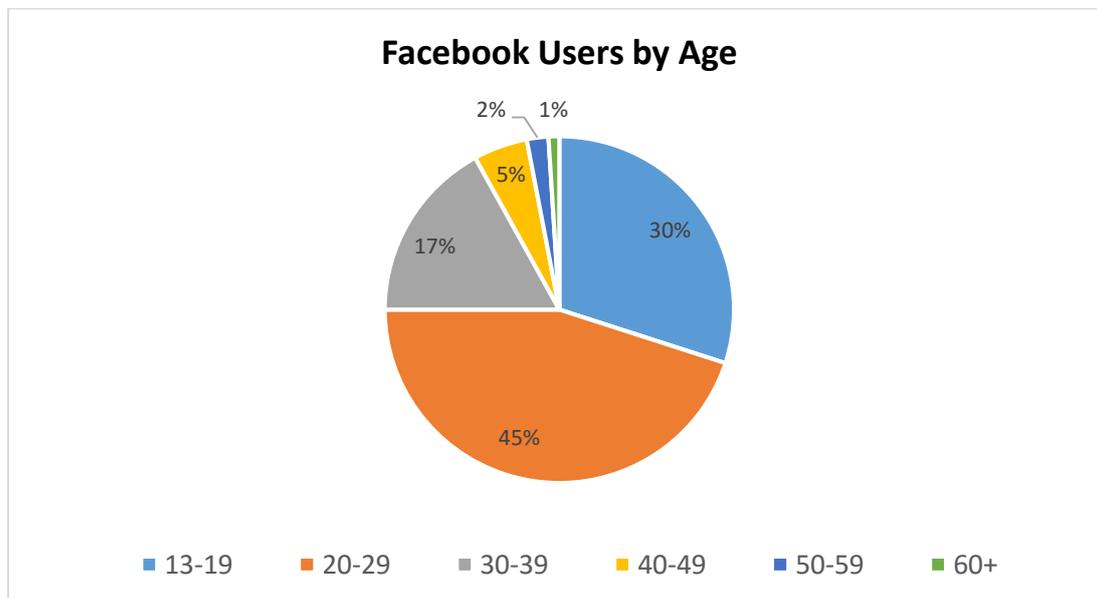
Survey results show the average daily internet usage on PC's or tablets to be over four and a half hours and almost 2 and a half hours by smartphone. Regardless of device type Vietnamese are reporting an average daily social media participation of 2 hours and 18 minutes. From among self-labeled 'internet users' 96% indicated they access the internet at least weekly and 78% say they access the internet on a daily basis⁸.

The cost of this frequent internet activity remains relatively inexpensive. Many internet users access the web through the abundant offering of free internet in many public areas. For paid internet usage the average monthly cost of 10 mbps internet is 242,243 VND (about USD \$11.50)⁹. For 1 gb of mobile broadband the average cost is about 70,000 VND (about USD \$3.33)¹⁰.

Content and Online Activity



Vietnamese are extremely social in their online activities. With a 25% year on year increase, some 35 million Vietnamese (37% of the total population) are active social media users. This includes some 29 million people who are active social *mobile* social media users which is a 21% year on year increase¹¹. Facebook continues to grow and maintain it's solid lead as the top social media platform although domestic platform Zalo maintains a strong second place. The spread of Facebook users across age groups is shown below¹².



Once on Facebook, posting pictures is a popular activity. Smartphone users in Viet Nam take an average of 20.5 pictures with their smartphone weekly. But if they regularly post pictures to Facebook, those smartphone users take an average of 44 pictures per week with their smartphone. For both frequent or infrequent Facebook picture posting Vietnamese, about half the pictures they take with their smartphone are selfies or wefies¹³.

Beyond their interaction with one another, Vietnamese users follow a variety of social media pages or accounts from celebrities, news pages, music channels and food/drink related accounts. The following three tables show the top accounts by follower in Viet Nam for Facebook, Google+ and Twitter¹⁴.

Top Facebook Accounts
YAN News (10 million plus)
Tran Khoi My (singer, 9 million plus)
MC Tran Thanh (actor 9 million plus)
Vo Hoai Linh (actor, comedian 9 million plus)
M-TP (singer, 8 million plus)
Ho Quang Hieu (singer, 8 million plus)
Minh Hang (singer, actress, 7 million plus)
Chi Pu (actress, 7 million plus)
Goc Thu Gian (news site, 7 million plus)
24h (news site, 7 million plus)

Top Google+ Accounts
Bao Thanh Nien (news site, 400k+)
YAN News (news site, 300k+)
Coca Cola Vietnam (300k+)
Ghien Ca Phe (coffee lovers site, 200k+)
Sprite Vietnam (200k+)
Trung Nguyen (coffee, 200k+)
Bestie (women's website? 200k+)
Yan Bi Kip Yeu (love site? Part of YAN news, 200k+)
Hotdeal.vn (commercial deals site, 200k+)
YAN Radio (music site, 200k+)

Top Twitter Accounts
Viet Tran @JVeermind (video blogger, 600k+)
@ilovetypography (British author living in VN, 400k+)
@proNarchive (model? 300k+)
@ThichNhatHanh (Buddhist monk, page by followers, 300k+)
@eminem_vn (music page? 100k+ followers but no tweets?)
@OfficialKimLee (DJ, model, 100k+)
Dong Nguyen @dongatory (game designer (Flappy Birds), 100k+)
njh @ORIGINIALL (spam account? 80k+)
Thanh Pham @CThanhPham (actor, 50k+)
Mat Ngu @12ChomSao (horoscope site, 40k+)

When looking directly at the top websites frequented by Vietnamese users, the list is dominated by news sites along with social media and search engines. 40% of the population reads news online via smartphones. 58% of males reading online news prefer 24h while 57% of females prefer VnExpress¹⁵. Vietnamese users also utilize the web to influence purchasing decisions. One survey found that 73% of internet users had used online information in making recent purchasing decisions¹⁶.

Top 25 Websites in Viet Nam ¹⁷	
1.	Cococ.com (VN web browser and search engine)
2.	Google.com
3.	Facebook.com
4.	Youtube.com
5.	Webtretho.com (news site)
6.	Google.com.vn
7.	Zing.vn (music site)
8.	Daikynguyenvn.com (news site)
9.	Vnexpress.net (news site)
10.	Nhadatso.com (real estate site)
11.	24h.com.vn (news site)
12.	Blogphongthuy.com (Feng Shui site)
13.	Taimienphi.vn (tech information, free software downloads)
14.	Nguoiduatin.vn (news site, 'legal, political, social, economic')
15.	Doisongphapluat.com (news site, VN lawyers association)
16.	Yahoo.com
17.	Nguyentandung.org (info on Prime Minister Nguyen Tan Dung and general news)
18.	Kenh14.vn (entertainment news site)
19.	Dantri.com.vn (news site)
20.	Thethao247.vn (sports site)
21.	Blogspot.com
22.	Vtv.vn (news site, television news)
23.	Nhaccuatui.com (music site)
24.	Amazon.com
25.	Mangbongda.net (soccer site)

When considering online mobile activity, based on the population as a whole, 34% engage in mobile messaging, 29% watch mobile video; 28% use maps on mobiles; 23% participate in mobile gaming and 19% use mobiles for banking¹⁸. Looking at apps (applications) in use on smartphones in Viet Nam we find the following top free apps on Android phones.

Top free apps (Android)	
Facebook	
Facebook Messenger	
Zalo	
Zing MP3	
UC Web browser	
Facebook lite	
Camera 360 funny stickers	
Wifi Master Key	
Co Ty Phu - (monopoly type game)	
My Talking Tom (care for virtual cat)	

Again it's notable that Facebook or its derivatives occupy three of the top 10 spots. The top free apps for IOS yield a similar list but with the addition of YouTube (maybe absent on Android lists because it's typically pre-installed there?) and a couple of alternate games. The top paid apps for both Android and IOS tend to include a number of utilities with a heavy emphasis on photography or video utilities or filters. The top grossing apps for both platforms are all games¹⁹.

Across all devices and platforms, video remains a primary activity. A survey of internet users under the age of 25 showed that 94% watched videos online at least weekly and 62% reported watching online videos daily²⁰. YouTube is the primary video platform in Viet Nam although other platforms are present. Other popular video providers in

Viet Nam include Phim.soha.vn; Clip.vn; Tv.zing.vn; Megafun.vn; Xoai.vn; Xemphimonline.com; Thegioiphim.com; and Anyphim.com. The top YouTube channels watched by Vietnamese include music videos, clips from television stations and children’s programming.

Top 10 YouTube Channels in Viet Nam ²¹	
1.	POPS MUSIC (music videos)
2.	5S Online (television sitcom)
3.	Truyen Hinh Vinh Long (THVL television station)
4.	YEAH1TV (television station)
5.	Vietnam Esports TV (sports television)
6.	POPS Kids (children's television programming)
7.	Zing MP3 (music videos)
8.	Be Bao An (children’s programming)
9.	YEAH1 MUSIC (music videos)
10.	FAP TV (comedy)

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⁴ <https://www.consumerbarometer.com/en/insights/?countryCode=GL>

⁵ <https://partner.buzzcity.com/campaignplanner.php>

⁶ <http://www.internetlivestats.com/internet-users-by-country/>

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⁸ <http://wearesocial.com/uk/special-reports/digital-in-2016>

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¹⁰ <http://prepaid-data-sim-card.wikia.com/wiki/Vietnam>

¹¹ <http://wearesocial.com/uk/special-reports/digital-in-2016>

¹² <http://wearesocial.com/uk/special-reports/digital-in-2016>

¹³ <https://qandme.net/report/en>

¹⁴ <http://www.socialbakers.com/statistics/facebook/pages/total>

¹⁵ <https://qandme.net/report/en>

¹⁶ <https://www.consumerbarometer.com/en/insights/?countryCode=VN>

¹⁷ <http://www.alexa.com/topsites/countries>

¹⁸ <http://wearesocial.com/uk/special-reports/digital-in-2016>

¹⁹ <https://www.appannie.com/apps/google-play/top/>

²⁰ <https://www.consumerbarometer.com/en/insights/?countryCode=VN>

²¹ <http://www.socialbakers.com/statistics/youtube>