Navigating the Evolving Social Media Landscape

PREPARED BY DECISION LAB
MARCH 2020
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- THE CONNECTED CONSUMERS’ PROFILE
- THE TRUE/FALSE GAME

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Key take-aways

Contact us
Introduction
Q3 2019
Decision Lab asked consumers to share their social media habits

August 2019
The 1st issue of The Connected Consumer Report released

Q4 2019 – Q1 2020
2nd round of survey sent out to consumers

March 2020
Navigating the Evolving Social Media Landscape

More to come
Turning the Connected Consumers into a tracker, with periodic reports issued

Tracking the Connected Consumers
The Connected Consumers’ Profiles

GEN Z
BORN BETWEEN 1997 – 2005
AGE 15 - 23

GEN Y (MILLENIALS)
BORN BETWEEN 1981 – 1996
AGE 24 - 39

GEN X
BORN BETWEEN 1955 – 1980
AGE 40 - 65
Online quantitative survey using Decision Lab’s online panel

2149
TOTAL SAMPLE SIZE

15 DEC 2019 – 27 FEB 2020
SAMPLE COLLECTION PERIOD

NATIONWIDE
MALE & FEMALE 15 - 65
1. We show a statement regarding the social media behavior of Vietnamese consumers age 16 - 55
2. Guess whether the statement is True or False
3. We reveal the answer and the figures behind each statement
The Statements
YouTube has become the most popular social media platform. **False**
Facebook is still the no. 1 platform in terms of popularity, followed by YouTube and Zalo.

Most used social media platforms

Q: Which of the following social media platforms are you using? (Choose all that apply)
Instagram surpassed Zalo to be the 3rd most popular social media app for GenZ
TikTok, and Pinterest are competing for Gen Z’s attention, while Zalo fell behind YouTube and Instagram.

Q: Which of the following apps do you use? (Choose all that apply)

Gen Z
- Facebook: 97%
- YouTube: 90%
- Instagram: 68%
- Zalo: 65%
- TikTok: 32%
- Pinterest: 32%

Q: Which of the following apps do you use? (Choose all that apply)

Gen Y
- Facebook: 97%
- Zalo: 90%
- YouTube: 85%
- Instagram: 42%
- TikTok: 22%

Q: Which of the following apps do you use? (Choose all that apply)

Gen X
- Facebook: 95%
- Zalo: 84%
- YouTube: 72%
- Instagram: 21%
- Twitter: 9%
GenX is twice more likely than GenZ to stop using at least 1 social media platform.

False
On average, Gen Z use more social media apps than Gen X, but are much more likely to quit at least one of those.

Q: Which of the following apps have you intended to stop using? (Choose all that apply)

- Wanting to quit at least 1 app - % population
  - Gen Z: 68%
  - Gen Y: 59%
  - Gen X: 33%

- Number of apps used
  - GEN Z: 4.32
  - GEN Y: 3.82
  - GEN X: 3.07

n=2149
Local music streaming sites are the 2nd most popular platform for watching music video.

True
YouTube dominates when it comes to music videos. For streaming music, local sites and Spotify are the next most popular choices among Gen Z.

### Top Platforms for Music Video

<table>
<thead>
<tr>
<th>Platform</th>
<th>YouTube</th>
<th>Local sites (ZingMP3, Nhaccuatui, etc)</th>
<th>Facebook</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall n=2149</td>
<td>75%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Gen Z n=914</td>
<td>52%</td>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

#### Which platform do you go on to watch music videos?

### Top Platform for listening to music – Gen Z vs Overall

<table>
<thead>
<tr>
<th>Platform</th>
<th>Gen Z</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>55%</td>
<td>52%</td>
</tr>
<tr>
<td>Local sites (ZingMP3, Nhaccuatui, etc)</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>Spotify</td>
<td>14%</td>
<td>6%</td>
</tr>
</tbody>
</table>

#### Which platform do you go on to listen to music?

Overall n=2149

Gen Z n=914
Facebook is the most popular platform to get news for all three generations

False
Facebook is a prominent source to get news, especially for Gen Z. However, for Gen Y, local news sites are their go-to place.
Zalo is the most popular platform to connect with friends and family for all three generations

False
While Gen X and Gen Y prefer Zalo to connect with friends and family, Gen Z prefers Facebook and Messenger.

**Gen Z**
- Facebook: 43%
- Messenger: 33%
- Zalo: 16%

**Gen Y**
- Zalo: 41%
- Facebook: 38%
- Messenger: 16%

**Gen X**
- Zalo: 43%
- Facebook: 37%
- Messenger: 15%

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

$n=914$  
$n=937$  
$n=266$
TikTok is now the 3rd most popular platform for short videos

True
Facebook is the top platform for short videos except for Gen X, who prefers YouTube. TikTok’s popularity mostly come from Gen Z users.
GenZ is 1.5x more likely to use e-commerce sites for shopping than GenX, meanwhile GenX still prefers Facebook.
For shopping, Facebook is only popular among Gen X. For Gen Z and Gen Y, they most likely go to an e-commerce site.

Q: Which of the following apps do you use when you want to shop online?

**Gen Z**
- E-commerce sites: 54%
- Facebook: 13%
- Instagram: 9%
- Zalo: 1%

**Gen Y**
- E-commerce sites: 51%
- Facebook: 24%
- Brands’ websites: 6%
- Instagram: 2%

**Gen X**
- E-commerce sites: 37%
- Facebook: 35%
- Brands’ websites: 7%
- Zalo: 6%
- Instagram: 1%

n=914 for Gen Z, n=937 for Gen Y, n=266 for Gen X
GenZ is 3 times more likely to use local streaming services to watch movie than GenX.

True
YouTube dominates when it comes to watching movies. However, Gen Y and Gen Z also frequent local movies streaming services.

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

**Gen Z**
- YouTube: 45%  
- Local movie sites / apps: 31%  

**Gen Y**
- YouTube: 53%  
- Local movie sites / apps: 27%  
- Google search: 9%  

**Gen X**
- YouTube: 60%  
- Facebook: 11%  
- Local movie sites / apps: 11%
SmartTV is the most common device to watch movie

False
Mobile is King, meanwhile, smartTV and tablet are more popular among Gen X

Q: On which device do you use these platforms to watch movie?

N=2149
Key Take-aways

- Facebook is the most popular platform among all three generations.
- Apart from Zalo, local social media platforms do not have any significant share in consumers’ attention. However, among Gen Z, Zalo is facing increasing competition from YouTube, Instagram, TikTok and Pinterest.
- On average, Gen Z uses more social media platforms, but is also more ready to quit at least 1 of them.
- Gen Z is the generation most dependent on Facebook to get their news.
- Most online activities can be covered by YouTube and Facebook. Notable competitors of these two are not other social media platforms, but local music streaming sites and Spotify, movies streaming sites, local news publishers and e-commerce websites.
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