



# UNDERSTANDING APP USAGE BEHAVIOUR IN VIETNAM

July, 2020

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# INTRODUCTION



# BACKGROUND

- With almost 72% of smartphone users out of the 95 million population, Vietnam falls into the top 15 market of the highest number of smartphone users worldwide. According to Adsota report on “Vietnam’s digital advertising market in 2019”. Vietnam is also one of the nations with the highest ratios of users who download apps on mobile phones, with 750 million downloads in the year 2019, ranking at the 7<sup>th</sup> place, after other 6 such countries as Indo, the USA, Brazil, Indonesia, Russia, and Mexico. This figure has opened up a potential market for mobile phone apps and the market has grown-up further and further during the recent years. This tends to continue thriving in Vietnam.
- The report on “**Understanding app usage behavior in Vietnam**” conducted by CI Research is like the effort to bring about the updated and useful information to enterprises as well as users to understand more about the market of mobile apps in the current context and the next-coming tendencies.

# RESEARCH DESIGN

- **Target group**
  - Males & Females
  - 18 – 55 y.o
  - Lives in HCM, Ha Noi & other key cities
- **Research Methodology**
  - Quantitative research with combination of face-to-face interviews and self-completion interviews via mobile phone (mobile panel).
- **Sample size:** n = 300
- **Fieldwork time :** 15/06/2020 → 22/06/2020



## FIDINGS





## PART 1. MOBILE APP USAGE BEHAVIOUR

## SUMMARY ABOUT MOBILE APP USAGE

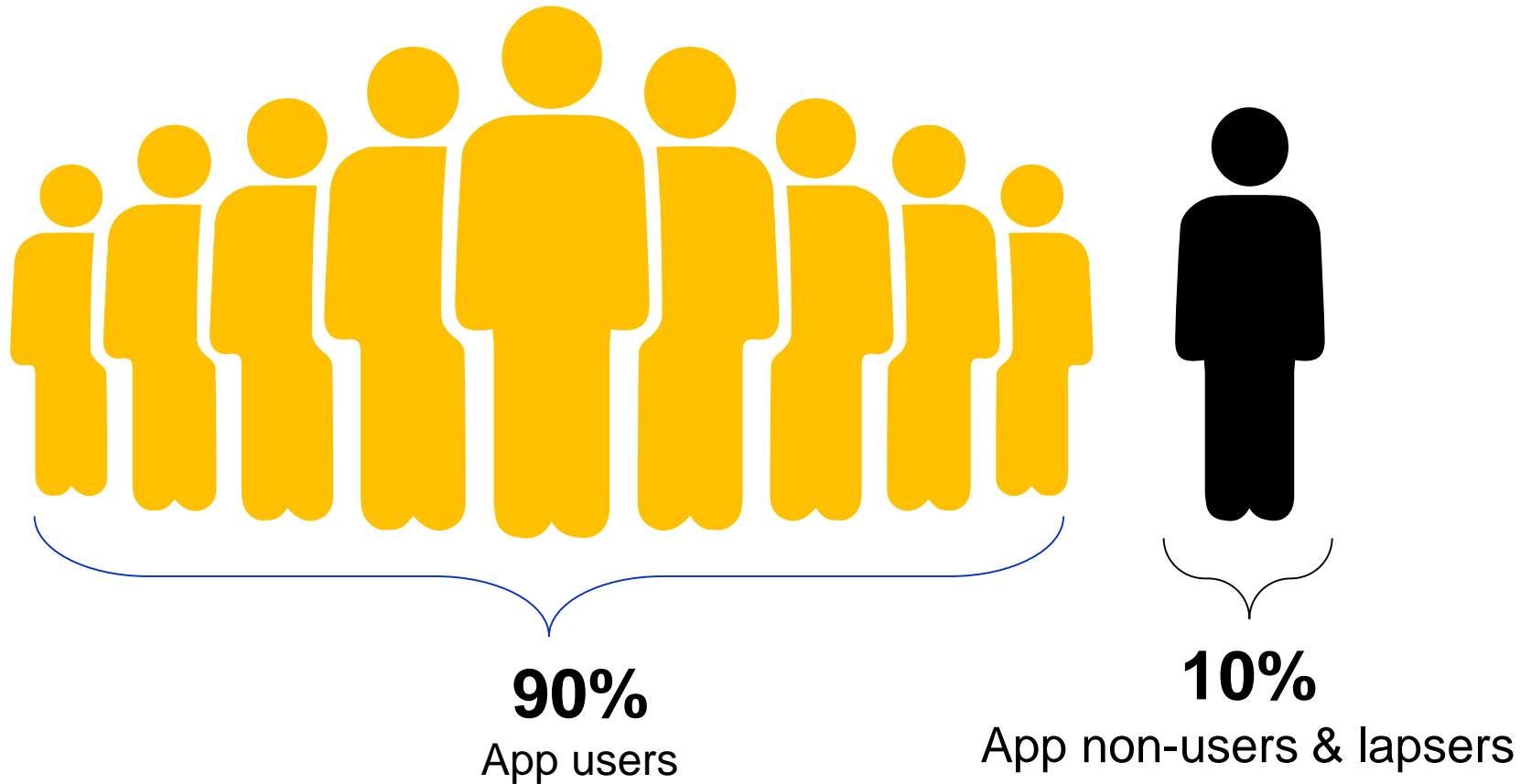
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- ❖ 90% consumers in the age of 18-55 yo have at least 1 application on their mobile phone
- ❖ Top 3 reasons for using apps are (1) convenience & time saving, (2) got attractive promotions and (3) apps' popularity
- ❖ Top 3 app categories that are loaded by the most people are Social Networks (96%), E-commerce apps (72%) and Entertainment (53%)
- ❖ More than 89% of the consumers are happy with the apps they are using, in which 43% show "very satisfied". The most satisfying point is fast payment (80%) and convenience (58%).



# MOBILE APP PENETRATION

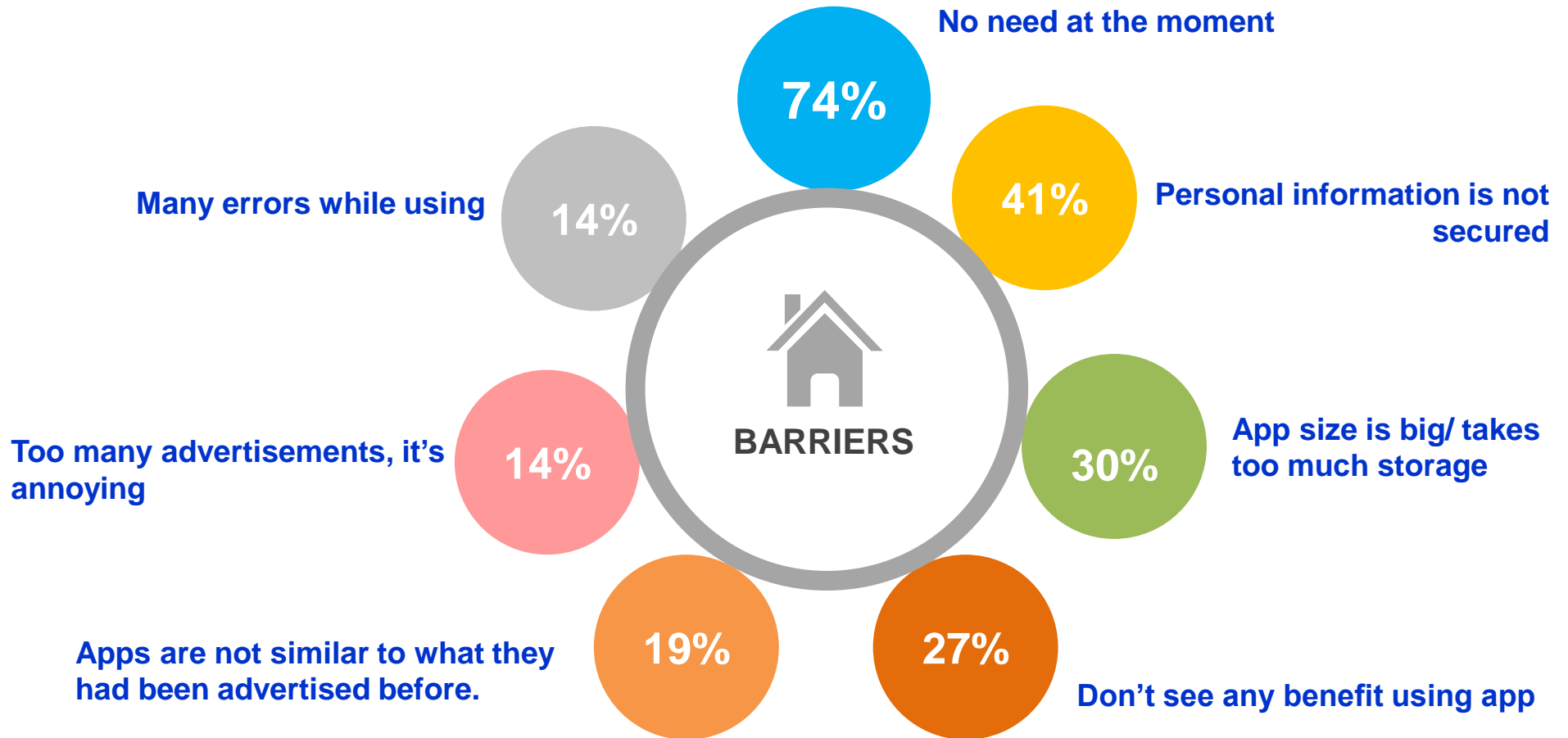
- 90% of current smartphone users download apps on phones. Non-users and those who used to download apps account for 10%.



N = 330

# BARRIERS OF USING MOBILE APP IN GENERAL

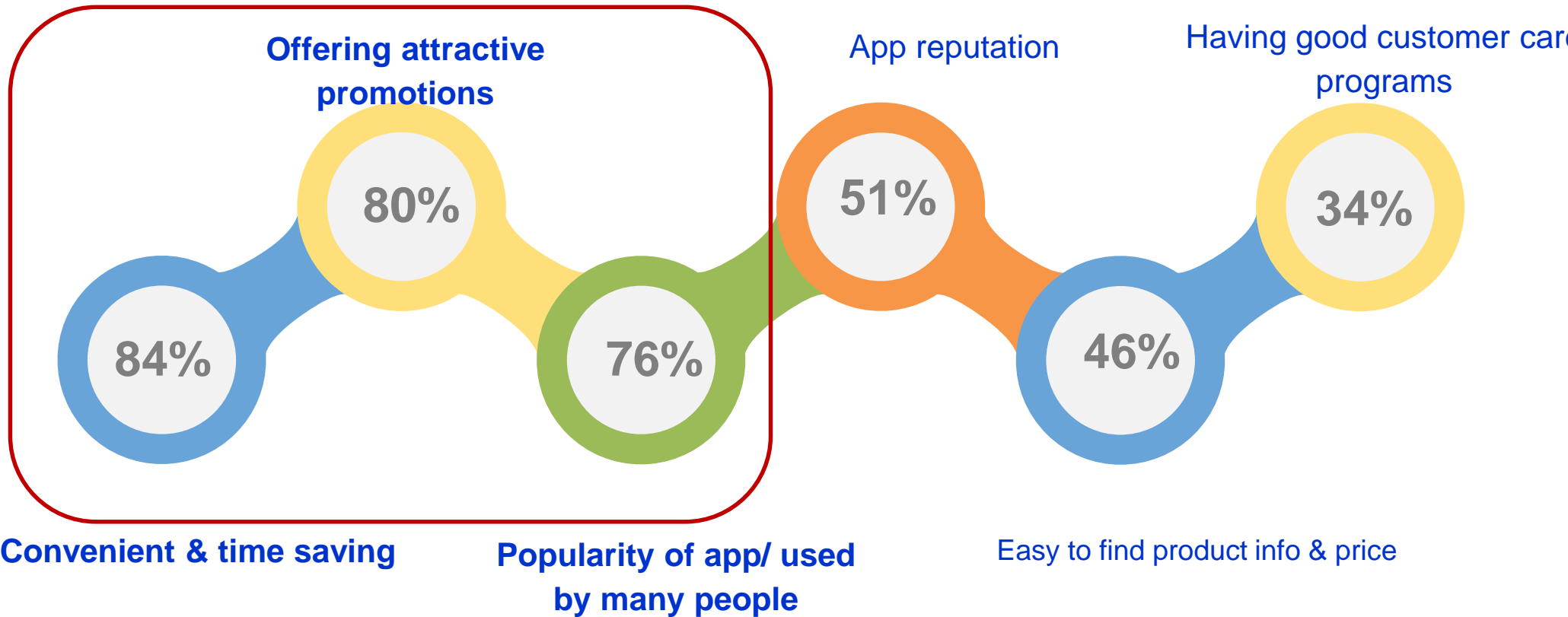
- **“Not be interested/Do not have needs to use”** is the key barrier for not using apps (74%). The next two barriers lie in **non-confidentiality of information** and **largely used data** when downloading apps.



N=30

# TRIGGERS OF USING MOBILE APP IN GENERAL

- Current app users now reveal: they download apps to use because (1) of conveniences and time-saving-ness offered by the apps; (2) attractive promotions; and (3) the apps are popularly used now.

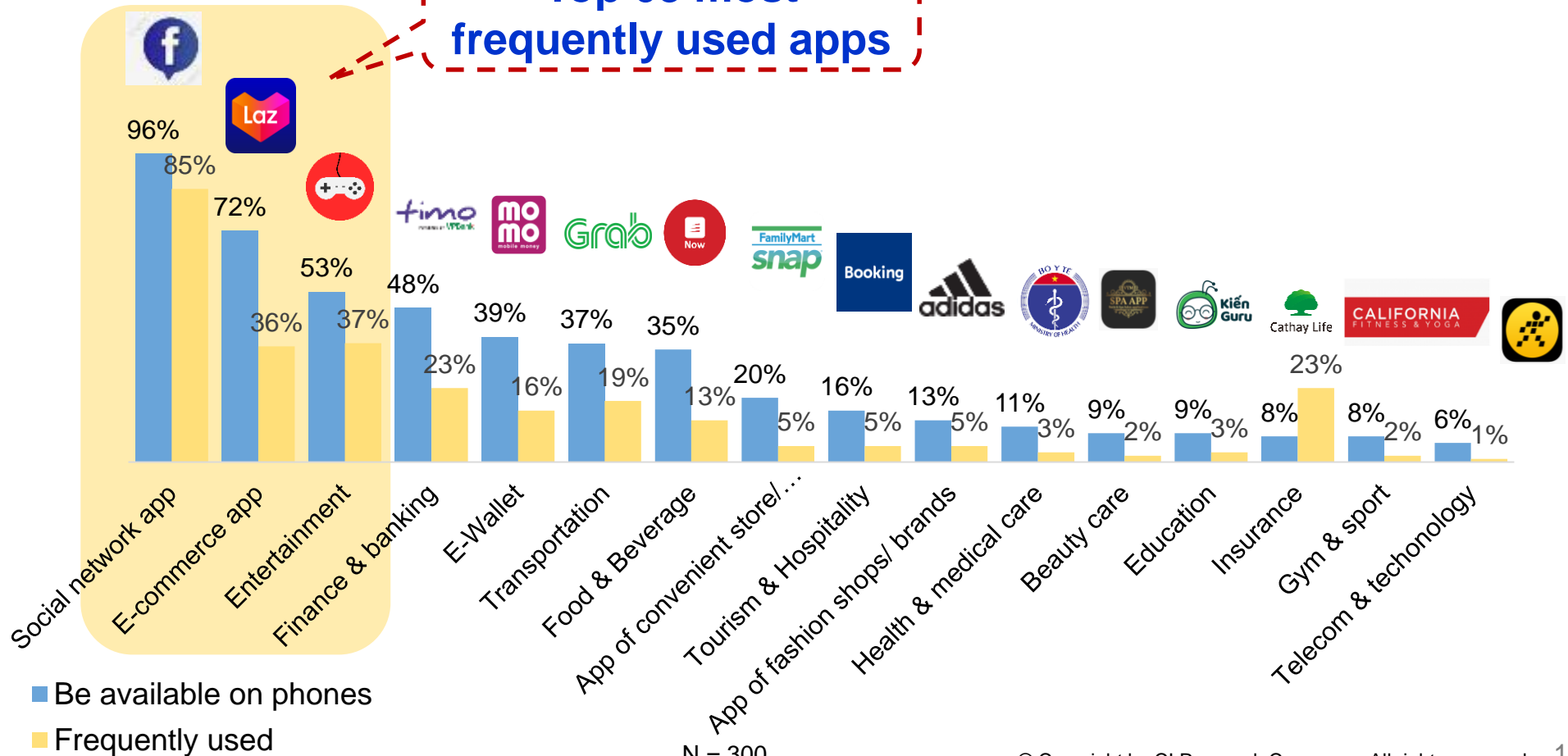


N = 300

# PENETRATION OF APP CATEGORIES

- The apps downloaded on users' mobile phones are rather various in fields, spreading from entertainment to shopping, convalescence, even physical education, and the one on sports, etc.,
- In which, the three outstanding fields on apps include those on social media. It accounts for the highest ratio, at 96% while the other two fields mean electronic commercial websites (at 72%) and entertainment (53%).

**Top 03 most frequently used apps**



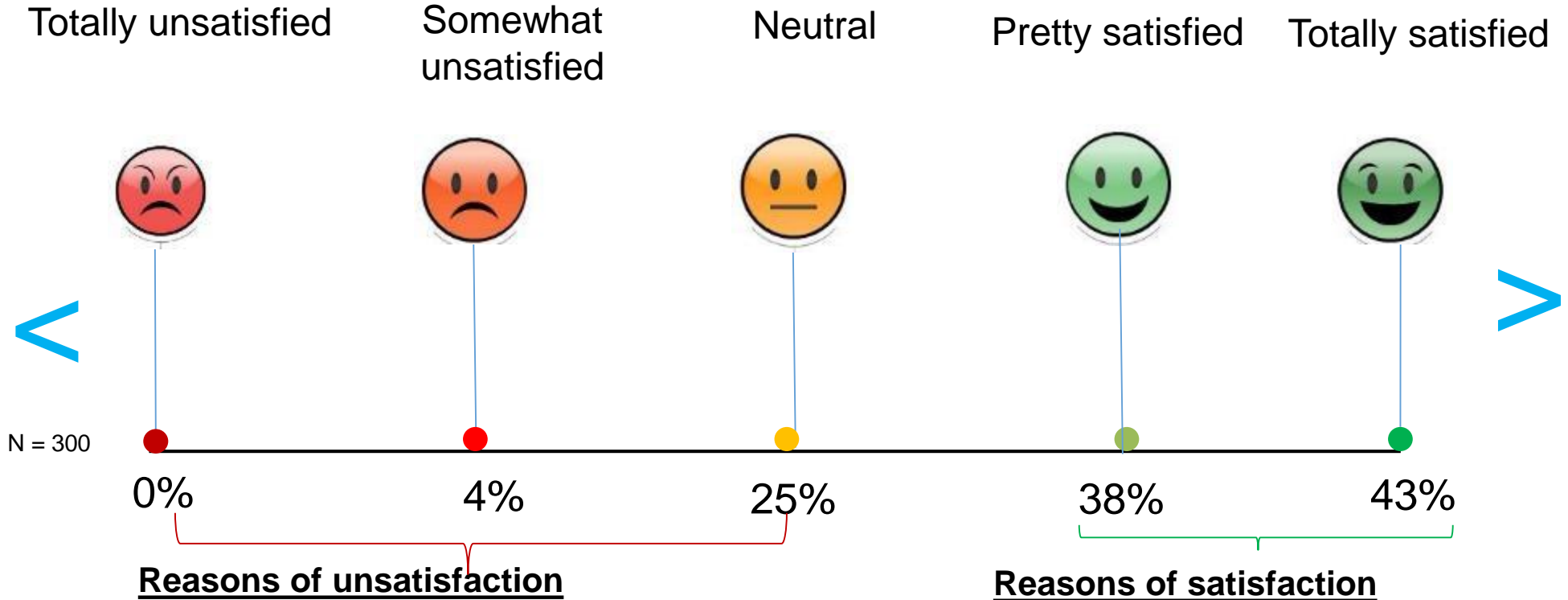
## TOP APPS IN THE HIGHEST PENETRATING CATEGORIES

- Introduction of Apps used the most frequently in some fields

E-commerce	Shopee, Lazada, Tiki ,Sendo
Entertain-ment	CGV, Galaxy, Gstar
Finance & banking	Techcombank, Vietcombank, Vietinbank, ACB, BIDV
E-Wallet	Momo, SamsungPay, ZaloPay, Viettel Pay, Airpay
Transport-ation	Grab, Goviet, Be, Vinasun, MaiLinh
Foos & Beverage	Grab, Now, Foody, Goviet, Baemin
Shopping locations	CoopMart, Big C, Emart, Aeomall, Vinmart (VinID)

# SATISFACTION ABOUT APP IN GENERAL

- Over 80% of consumers are satisfied with their currently used apps; 43% of them are totally satisfied thanks to quite a few promotions (44%) and the next one lies in time-saving-ness (40%).



Having little promotion program	35%
Not fit my needs	32 %
Doesn't bring benefits as expected	22 %
It's annoying to receive advertisements	10%
Difficult to use	4%

Having promotion program/ customer loyalty program (voucher/cash)	44 %
Timing saving	40 %
Convenient for using	20 %
Helpful in entertainment	9 %
Providing knowledges of new things	5 %



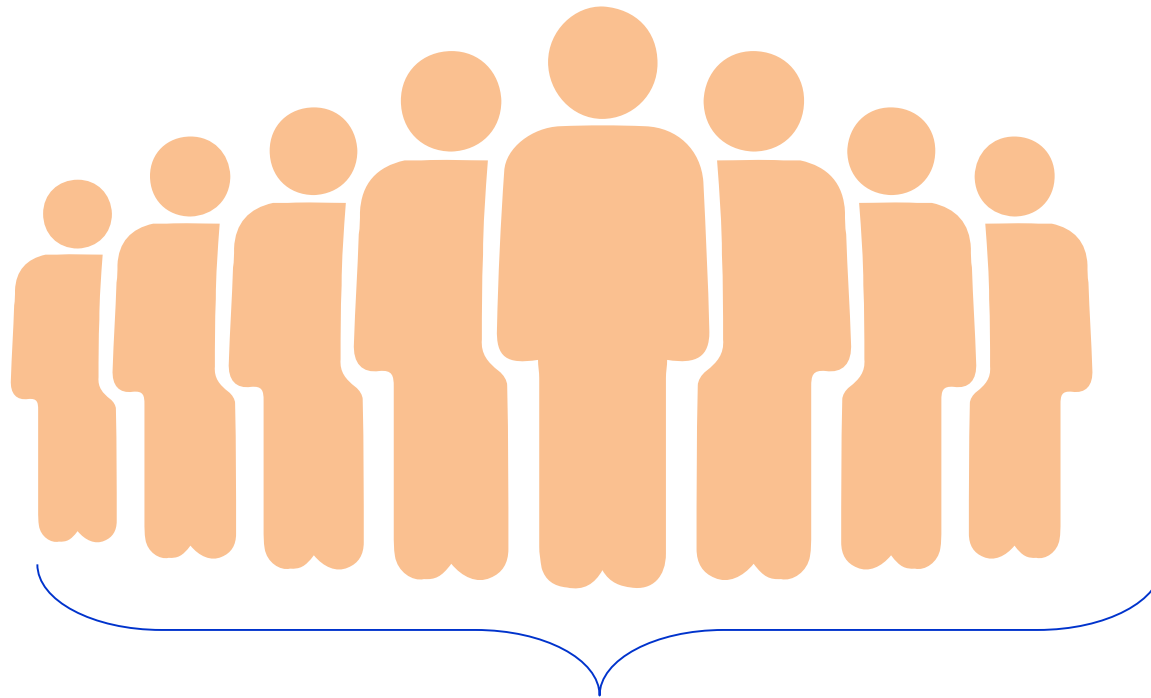
## PART 2. E-WALLET USAGE BEHAVIOUR

# SUMMARY OF E-WALLET USAGE

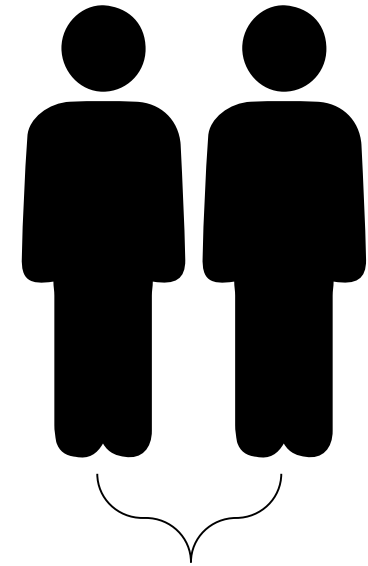
- ❖ Most of users know about uses and effects of E-wallets, 88% of them open E-wallets to recharge money for their phones, 80% of them make payments for bills, and 64% of them use E-wallets for money remittances.
- ❖ Besides the E-wallet-related barrier “Not having had needs yet”, people do not use them much because they have not much understood about the E-wallets, yet, they have been worried that the information shall not be confidential.
- ❖ It takes one person a year on average to open an E-wallet.
- ❖ Users get aware of E-wallets mainly from the two channels: relatives, friends, and Facebook.
- ❖ Momo, at present, is the E-wallet that dominates the market in terms of user ratio (84%), so higher away from such next-coming brands as Samsung Pay (14%), Zalopay (11%), Vin ID (9%), and Airpay (6%), etc.,
- ❖ 50% users are pretty satisfied with their currently used E-wallets thanks to fast and convenient payments without having to come over to offline places & free-of-charge money remittance.



# E – WALLET PENETRATION



**83%**  
E-wallet users



**17%**  
E-wallet non users

N = 300

# AWARENESS OF E-WALLETS' FEATURES

Off-line shopping payment

52%



85% Buying prepaid card



Cash recharge - withdrawal between E-wallets & bank accounts

55%



80% Paying bills



Online shopping payment

60%



64% money remittance

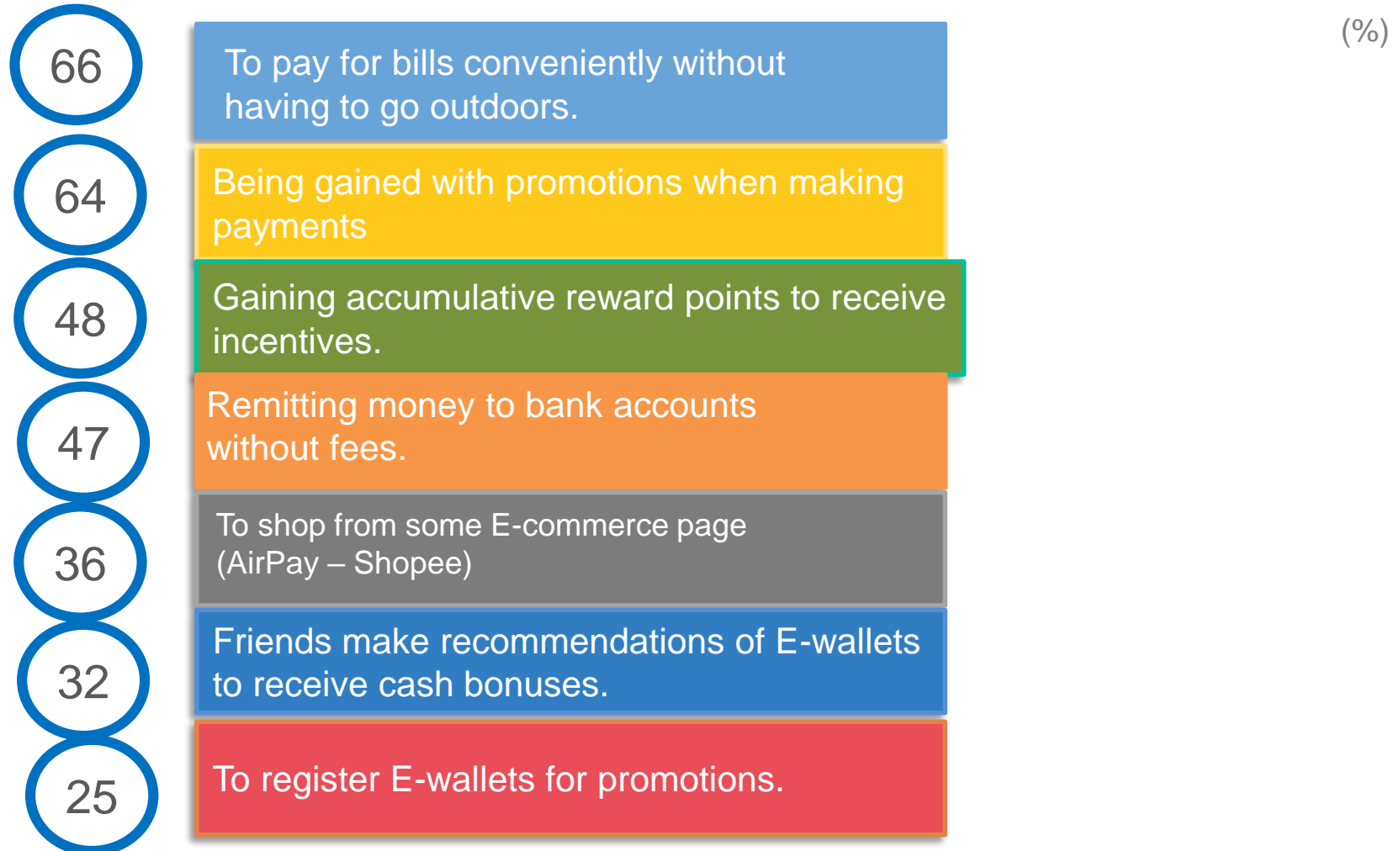


N = 300

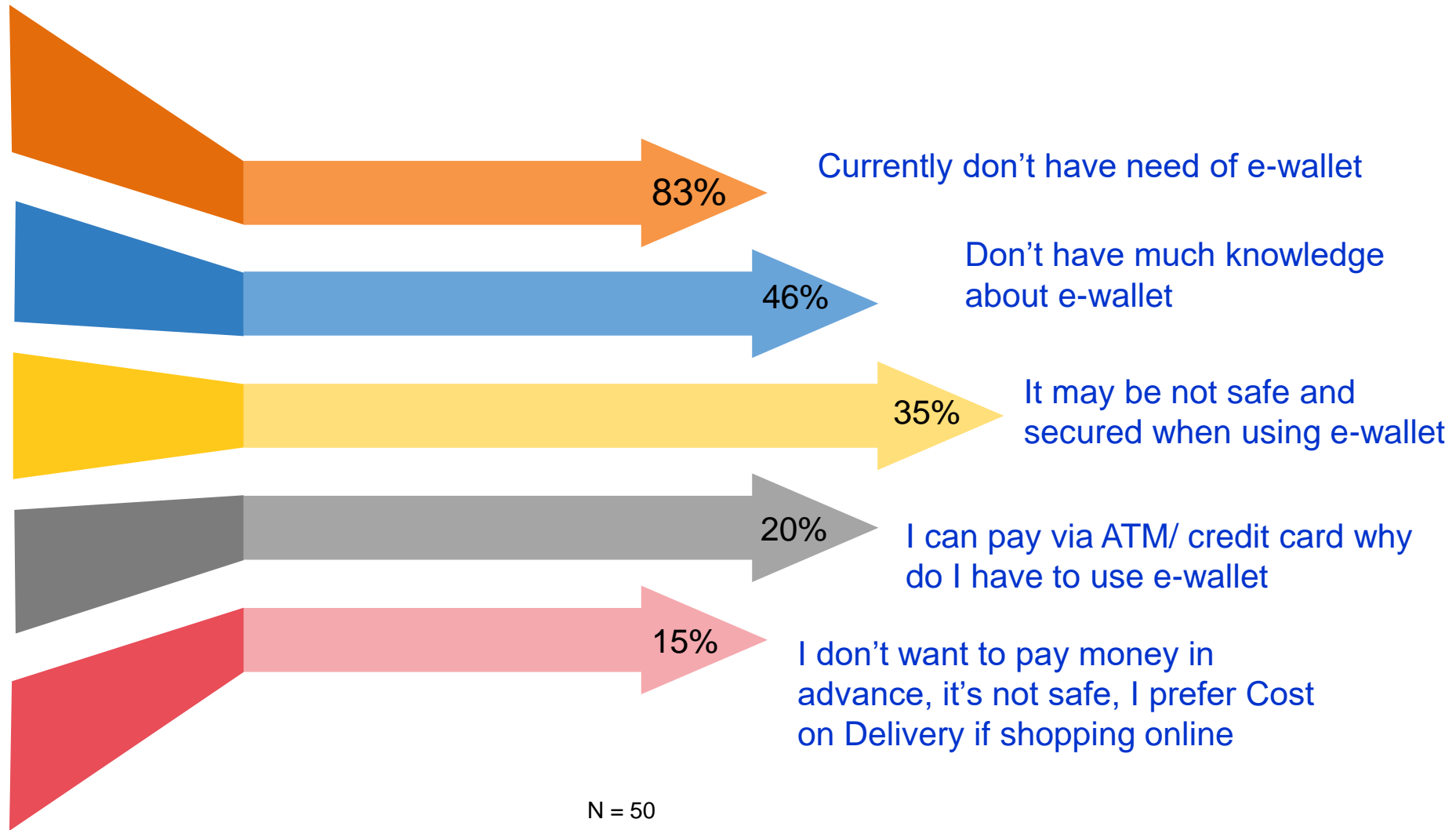
Those who are aware of E-wallets

# TRIGGERS TO USE E-WALLETS

- Top 3 triggers to open E-wallets: conveniences without having to go far away, promotions, and gaining accumulative reward points without fees when remitting money.

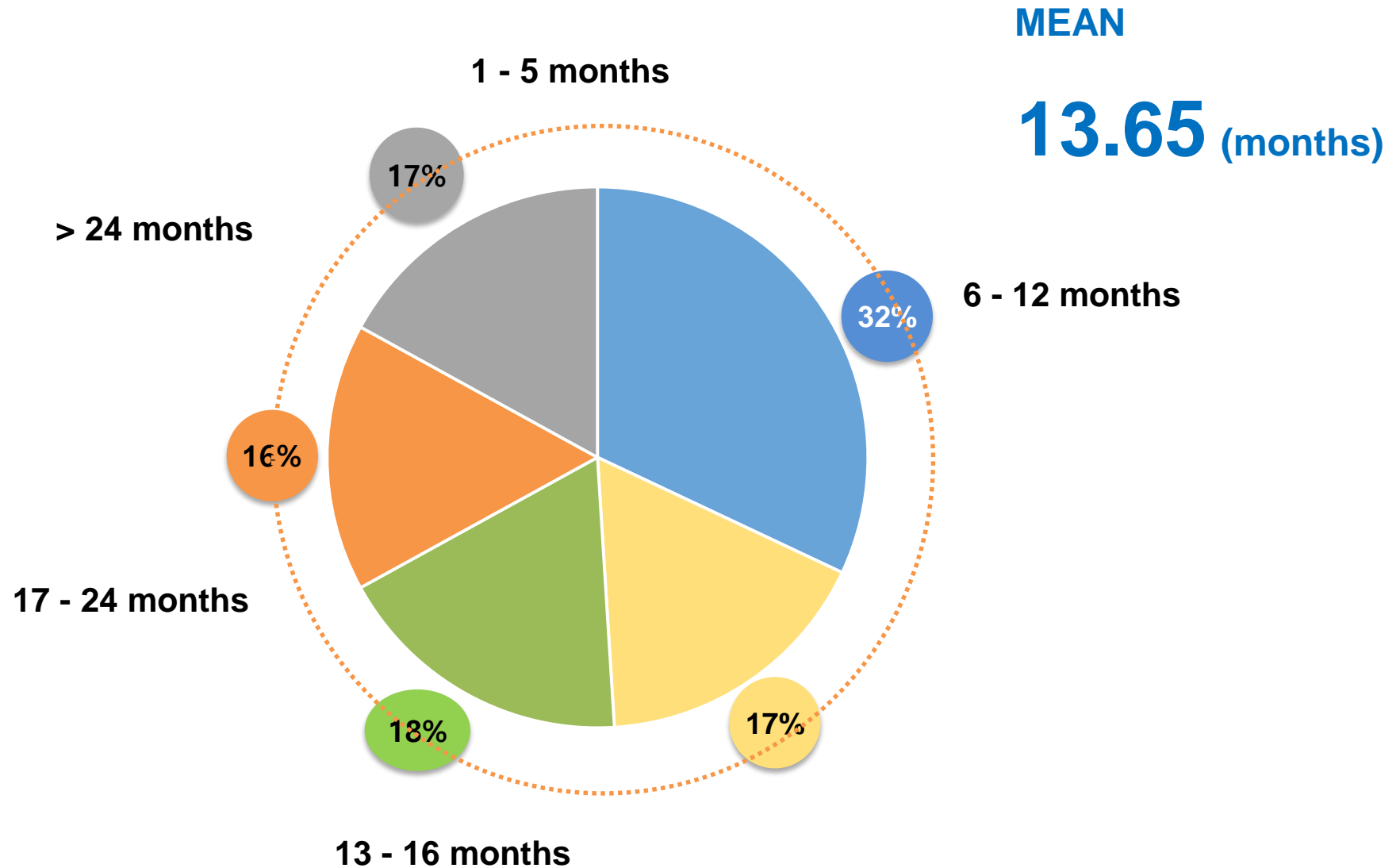


# BARRIERS OF USING E-WALLET



N = 50, Those who don't not use E-wallets

# HOW LONG AGO WHEN E-WALLET WAS REGISTERED?



N = 250, Those who currently use E-wallets

## SOURCE OF AWARENESS OF E-WALLET

WOM from family/  
friends

92%

Facebook

85%

Website/app of  
e-wallet's brand

43%

Other social  
networks (Zalo,  
viber, youtube...)

36%

From  
advertisements on  
LCD in public  
places

30%

Advertisement  
via email/ SMS

29%

Online News/  
Magazine

28%

Banners/ Posters

22%

Advertisement on TV/  
Radio

19%

Brochure/ Leaflet

20%

Newspapers/  
magazine

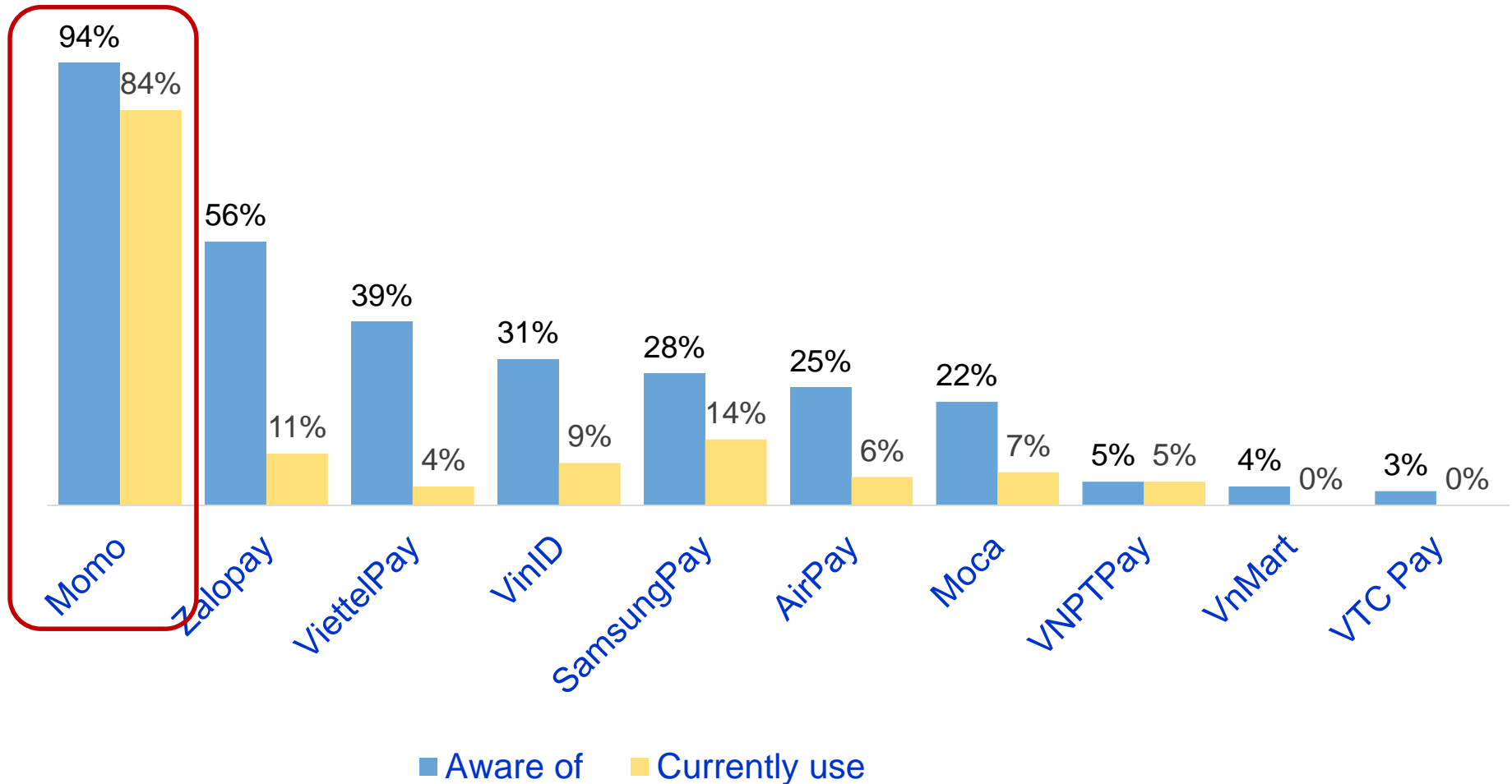
16%

From Celebrities

8%

# AWARENESS AND USAGE OF E-WALLET

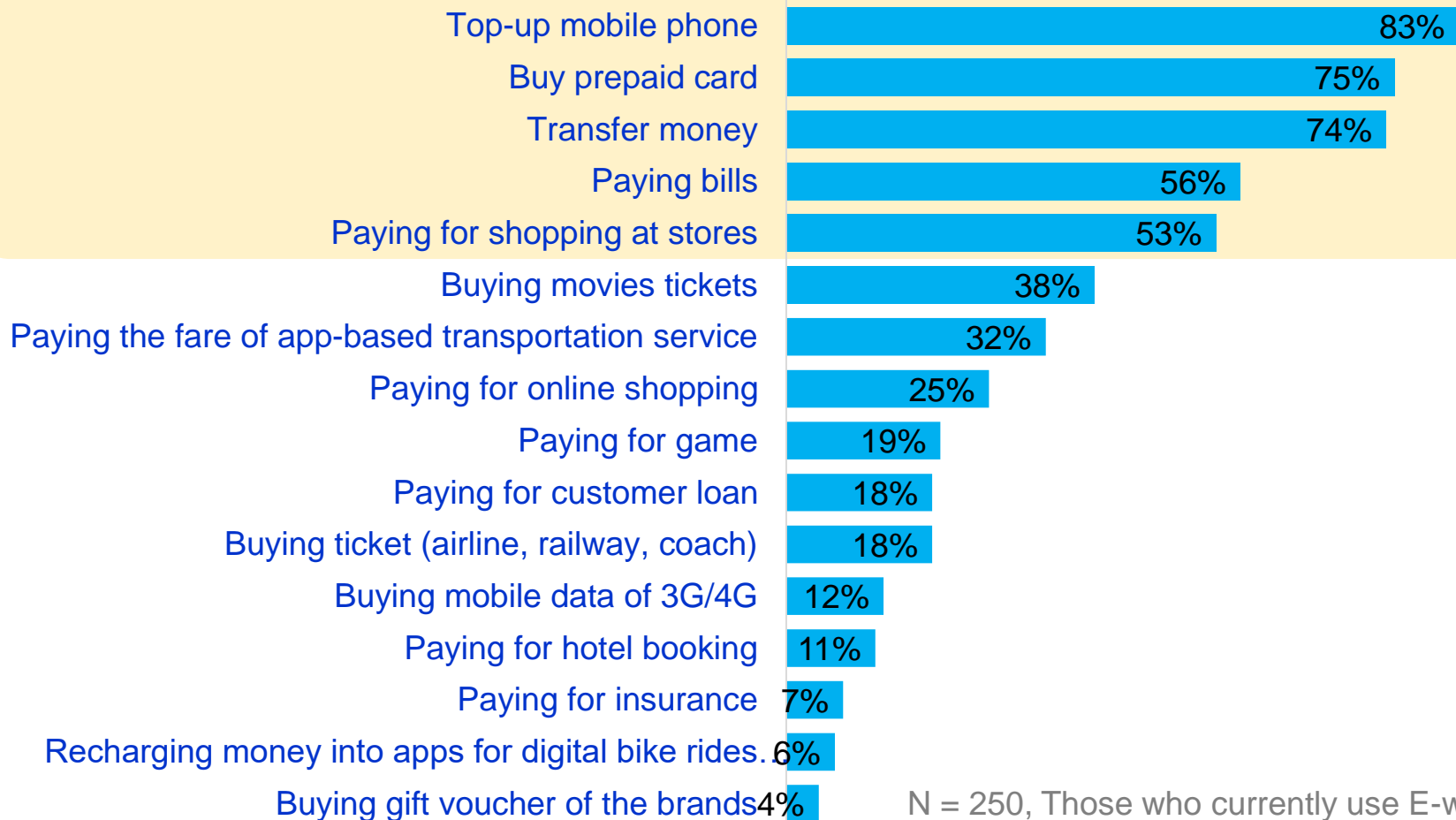
- Momo is the E-wallet that is almost prominent with 94% of people's awareness and 84% of users, 8-9 times than those of such other e-wallets as Samsungpay, Zalopay, and Viettelpay, etc.



N = 250, những người hiện có dùng Ví điện tử

# REASONS FOR USING E-WALLET

People use E-wallets for several different purposes, 05 of which are mentioned the most and they are: recharging money for their phones, buying scratching cards, remitting money, paying bills, and making payments at stores.



N = 250, Those who currently use E-wallets



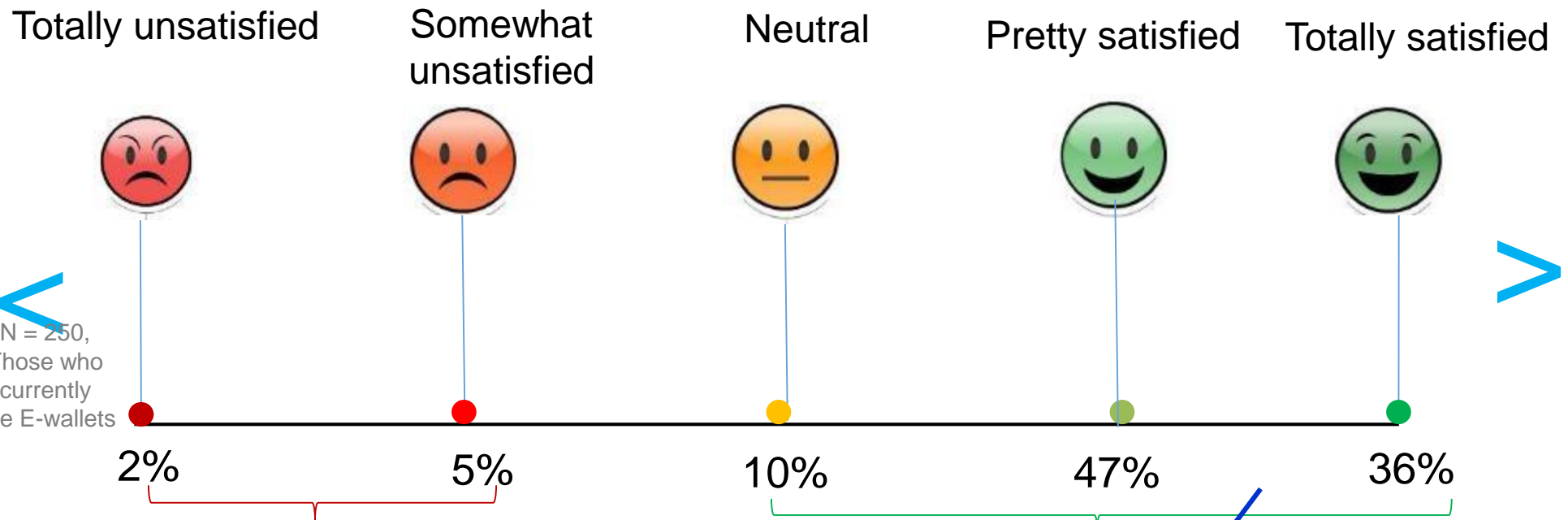
# PREFERRED PROMOTION FOR E-WALLET



N = 250, Those who currently use E-wallets

# SATISFACTION ABOUT E-WALLET IN GENERAL

- ❖ In general, 83% consumers are satisfied with their currently used E-wallets, 36% of them are totally satisfied thanks to the most mentioned thing – the fastness (80%) and the next one is the convenience (58%).



## Reasons for unsatisfaction

Confidentiality is not very good	30 %
Slow signal/ There is a lag in network	25 %
Few promotion programs	15 %
Has to pay fee for money withdraw	9 %
Money has been subtracted, but not yet transferred to receiver	5 %

## Reasons for satisfaction

Fast payment	80%
Convenient, don't need to go to the place	58 %
money remittance without fee	52 %
Get promotion when paying bills via e-wallet	46 %
Get customer loyalty program	38 %



## PART 3. SOCIAL NETWORK USAGE

# SUMMARY OF SOCIAL NETWORK USAGE

- ❖ Users spend rather much time browsing the social media with an average duration of 3 hours/day;
- ❖ Facebook, Zalo, and Youtube are the three social media popularly used now in Vietnam and their apps are downloaded the most by users, at 95%, 88%, and 67% successively;
- ❖ The key trigger for users to browse the social media is to chat with their friends, look at information of their acquaintances, and updated news & images alike;
- ❖ The top 3 points that users feel interesting from the social media lie in fun (67%), mood relief (64%), and chances for socialization & contact keeping with friends (59%);
- ❖ Nevertheless, there remain some points that make users hesitated when using the social media, including their concerns about being hacked and their information that is not kept confidential or private.

## TIME SPENT FOR SOCIAL NETWORK DAILY



Averagely one consumer spend about 6hrs per day for surfing Internet, in which 50% of time is for social network

N = 300

## CURRENTLY USED SOCIAL NETWORK APP

- ❖ 03 social media apps downloaded and used the most popularly are successively Facebook, accounting for almost all – at 95%, the next is Zalo at a rather high rate of 88%, and Youtube at 67%. The apps of other media are also used, however, their ratios are much lower than the three above-mentioned, under 20%.

95%



88%



67%



19%



15%



14%



7%



6%



4%



2%



N = 300

# REASONS FOR USING SOCIAL NETWORK

- ❖ Users mention quite a few purposes of using social media, three key and common of which mean: chatting with friends, looking at information of their acquaintances, and updated news & images.

86  
%

Chatting  
with  
friends

70  
%

View  
status/videos  
of friends/  
relatives

58  
%

View products  
information  
sold on social  
network

56  
%

Post status

52  
%

Post videos/  
photos

44  
%

View status/  
photos of  
celebrities/  
fanpage

43  
%

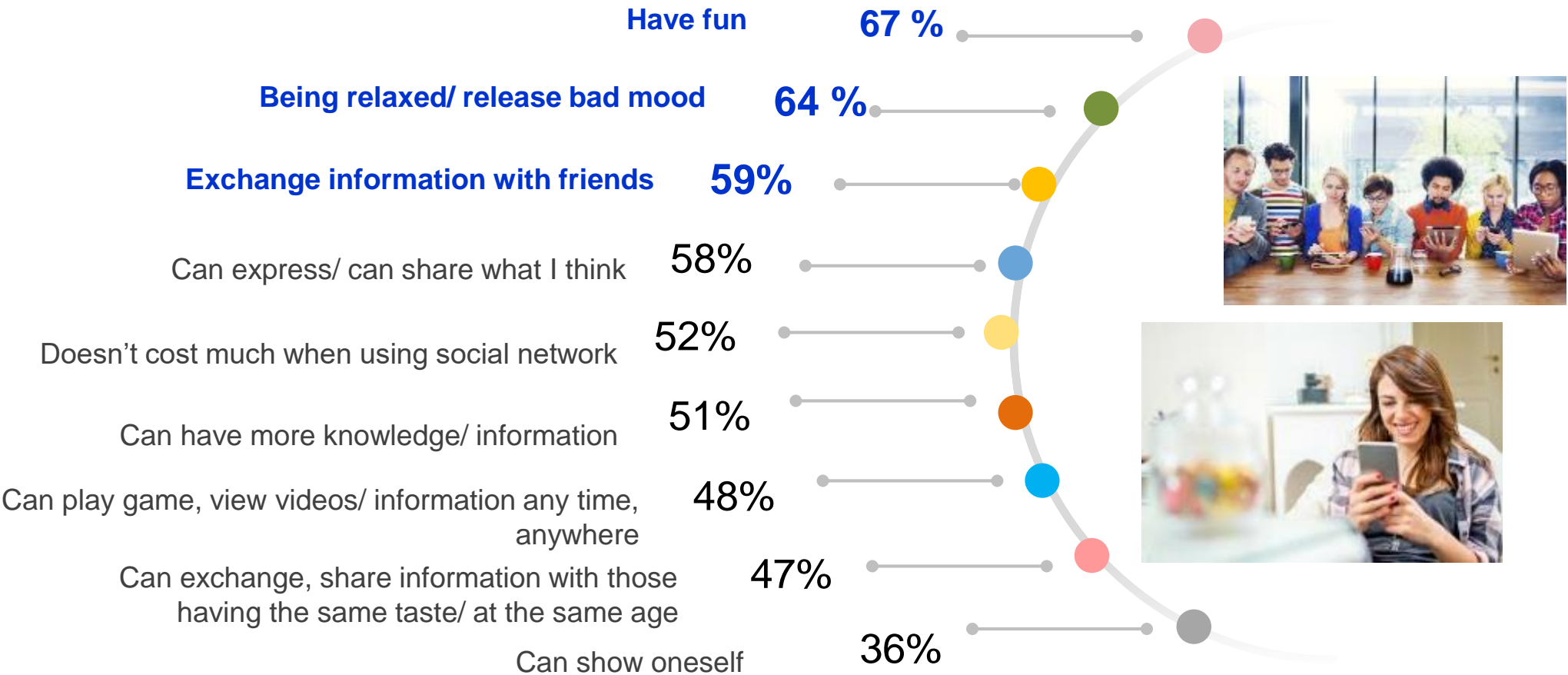
Press  
“like” photos,  
comments  
of others

22  
%

Play games

# WHAT SOCIAL MEDIA BRINGS ABOUT IS: .....

Users show that: when browsing the internet, they feel glad and their bad moods are relieved. Over 60% of the users mention these two advantages. In addition, users also feel about other positive things that Facebook brings about to them like socialization and exchanges with their friends & chances for sharing, etc.,



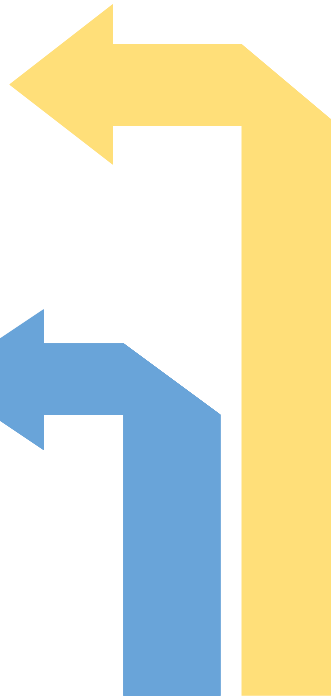


# CONCERNS WHEN USING SOCIAL NETWORK

However, “a coin shows two sides”. The social network make them concerned about some disadvantages such as: they are concerned their accounts may be hacked while their information is not kept confidential or private any longer.

**51%**

**Privacy & confidentiality**



**60%**

**Account can be hacked**



**48%**

**Too much advertising**

**22%**

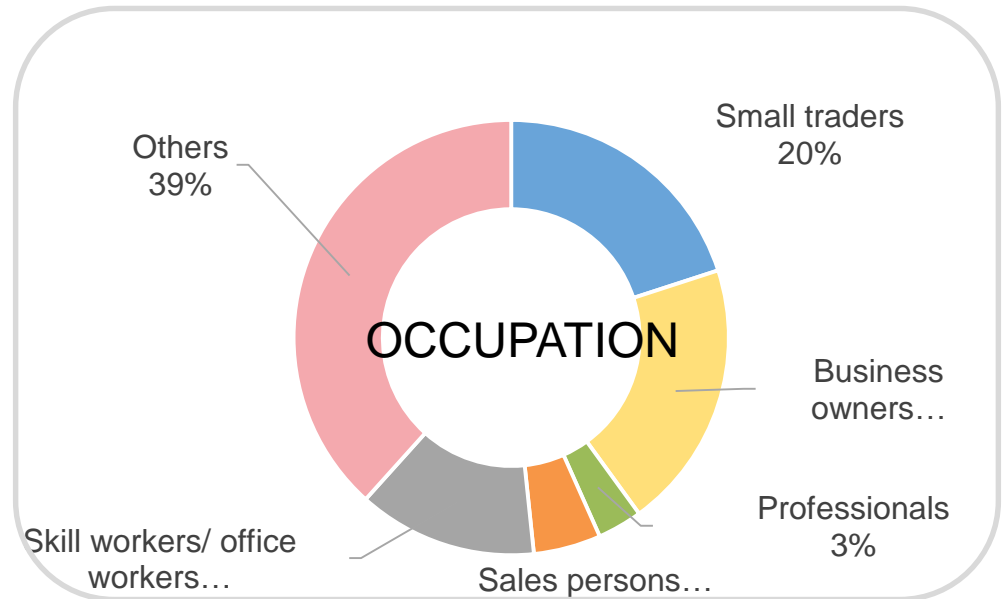
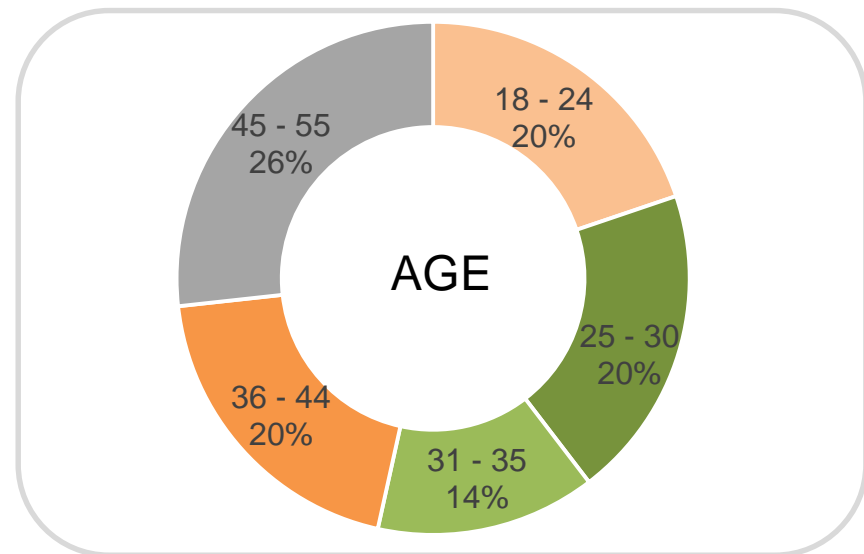
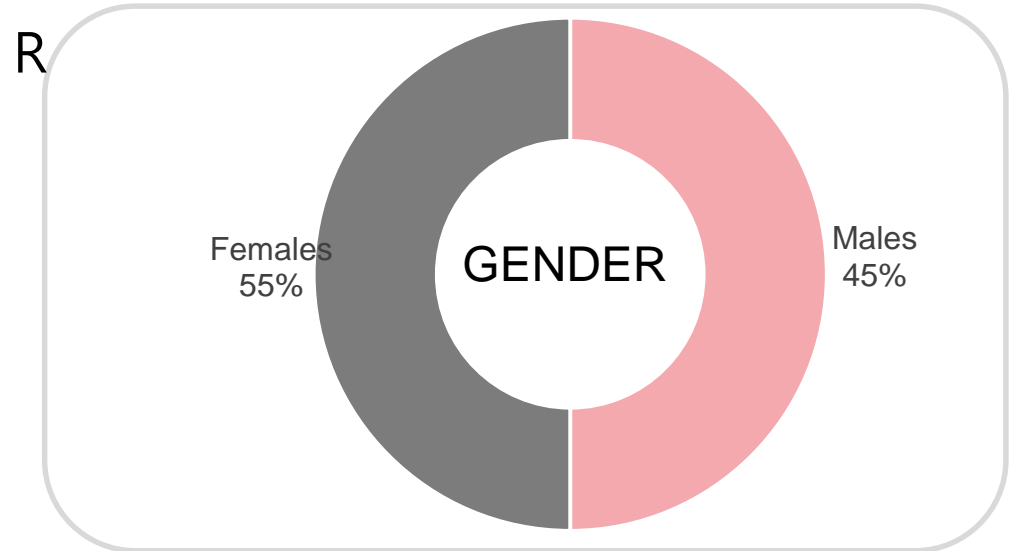
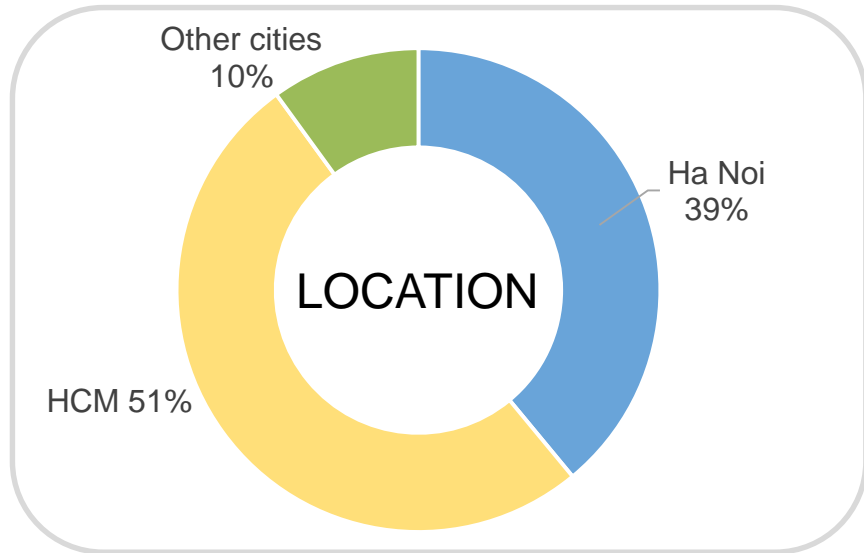
**Can be harassed by the strangers**

N = 300



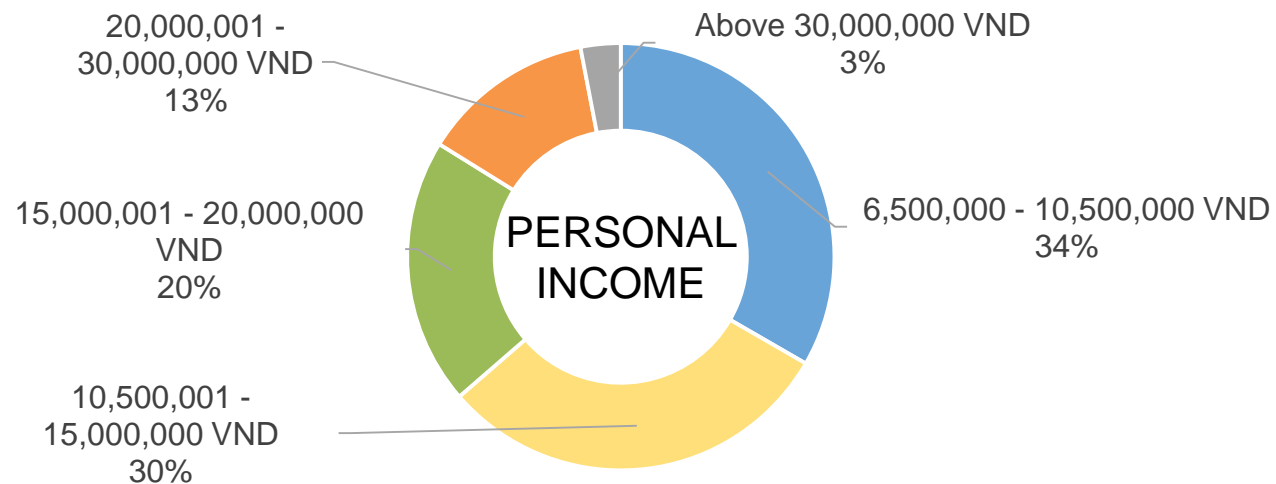
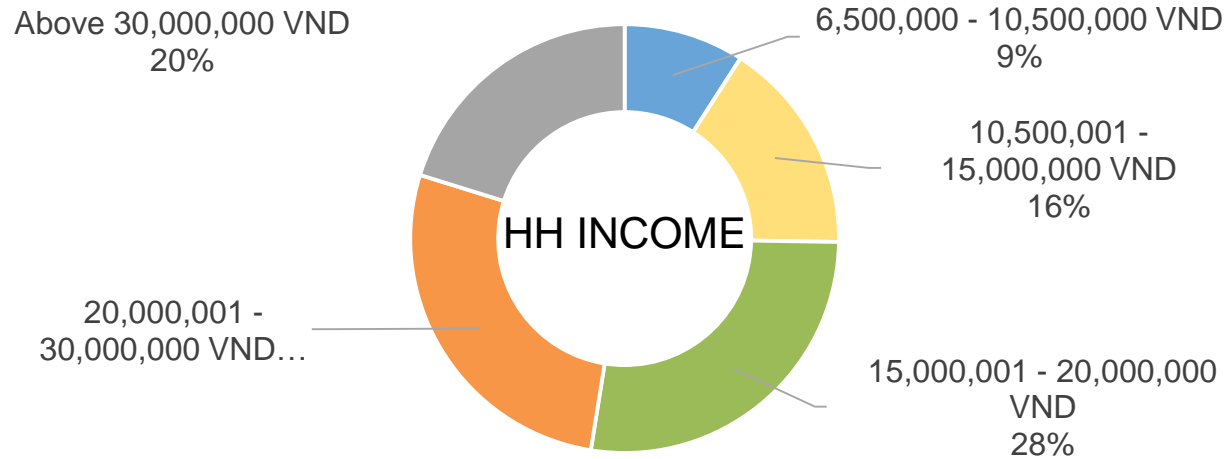
## PART 4. RESPONDENT PROFILE

# RESPONDENT PROFILE



## RESPONDENT PROFILE (Cont.)

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**CI Research look forward to  
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*THANK YOU*