

The Connected Consumer

# Redefining Vietnamese social media consumption

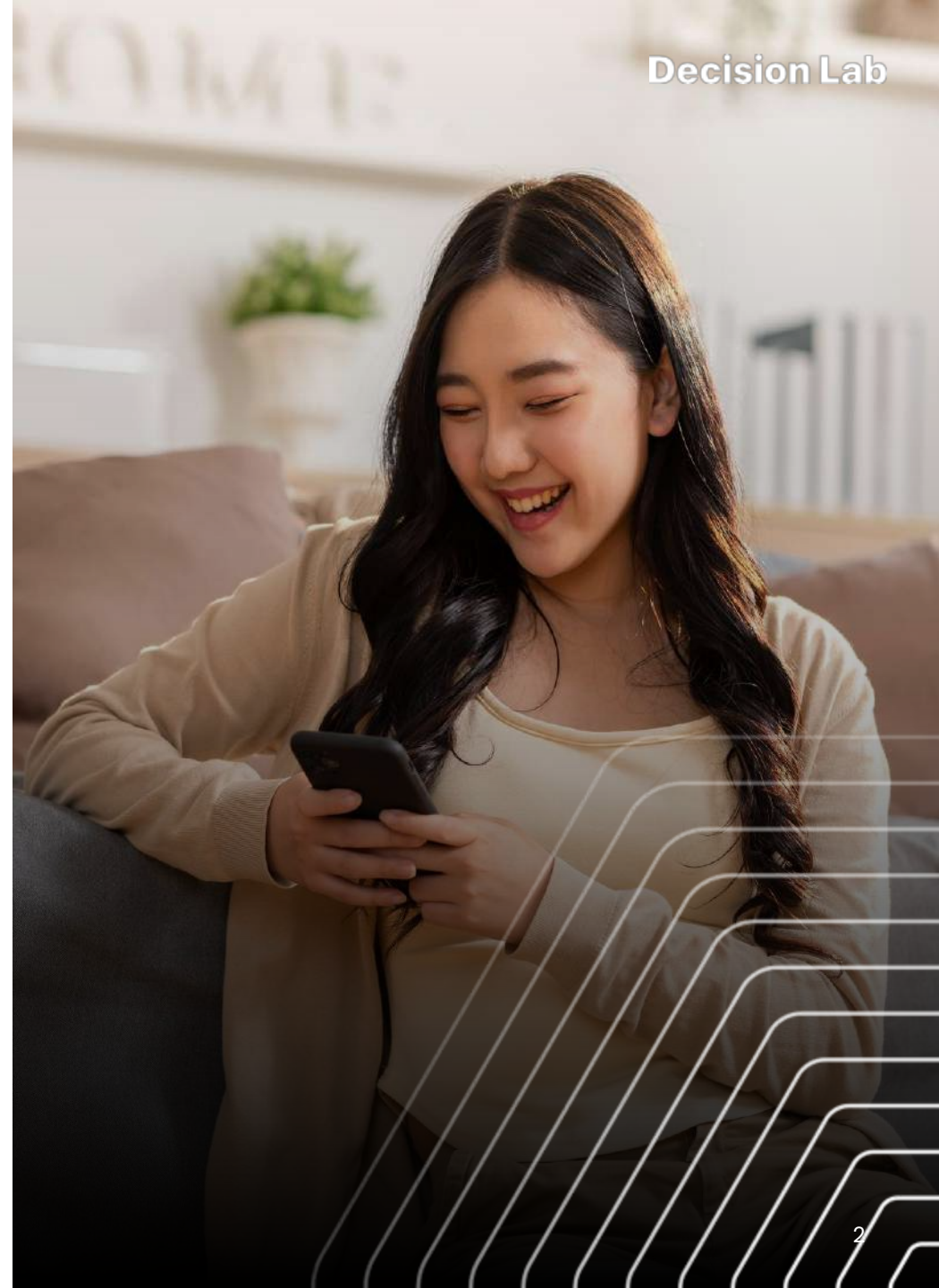


QUARTER 2 | 2024

# Content



1. Introduction
2. Social Media Landscape
3. Platforms by Activities
4. Platforms by Utilities
5. Opportunities for brands
6. Our solutions
7. Contact us







# Introduction

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## Background

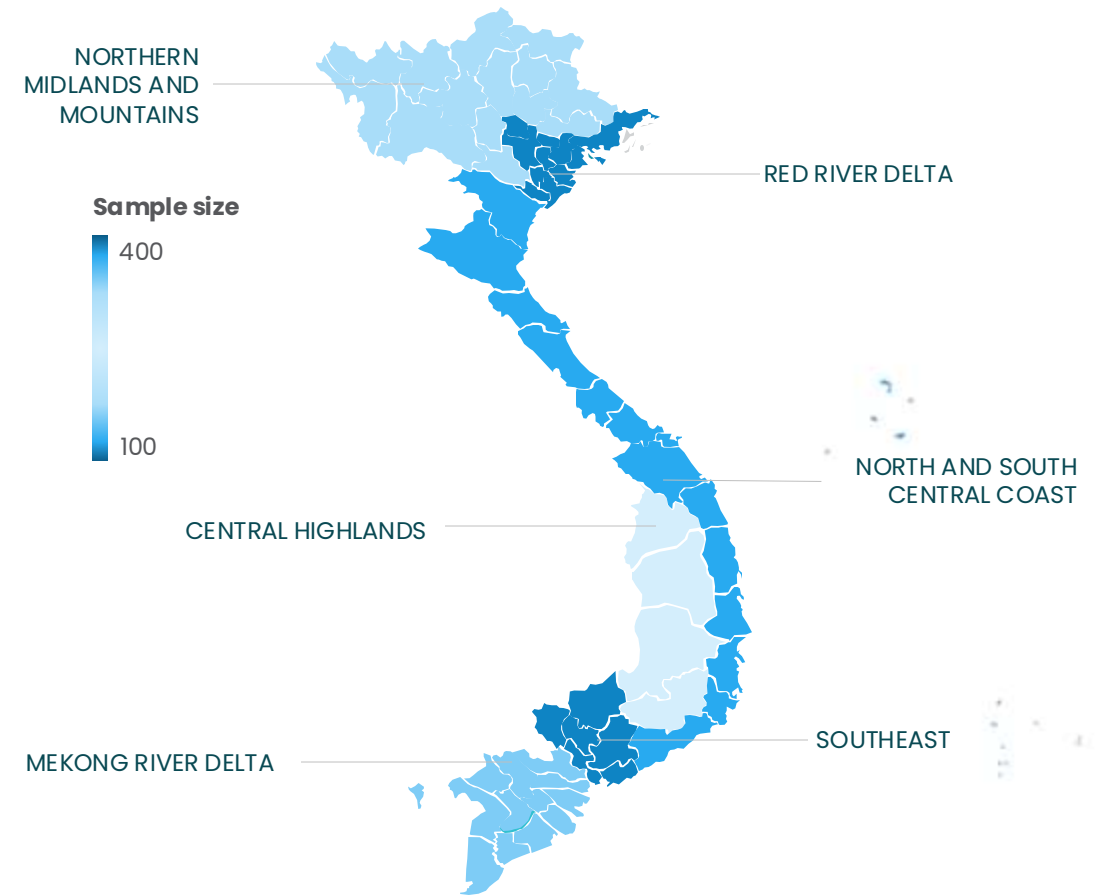
The Connected Consumer is a quarterly report conducted by Decision Lab since 2019. The study aims to provide the latest updates about Vietnamese digital consumption to support brands connect with consumers most effectively. Information in the report is analysed by Decision Lab's expert consultants and focuses on consumers' online habits, including social media usage, entertainment (music, movies, online videos), and utilities.

Disclaimer: This report has been prepared solely for information purposes over a limited time period to provide a perspective on the market. Information, analyses and conclusions contained herein should not be construed as definitive forecasts or guarantees of future performance or results. Decision Lab shall not be liable for any loss arising from the use of this report.

# Quantitative survey using online panel

QUARTER      SAMPLE COLLECTION PERIOD      TOTAL SAMPLE SIZE

<b>Q2 2024</b>	<b>April 2024 – June 2024</b>	<b>1,478</b>
Q1 2024	Jan 2024 – March 2024	1,446
Q4 2023	Oct 2023 – Dec 2023	1,330
Q3 2023	Jul 2023 – Sep 2023	1,330
Q2 2023	Apr 2023 – Jun 2023	1,603
Q1 2023	Jan 2023 – Mar 2023	1,741
Q4 2022	Oct 2022 – Dec 2022	1,584
Q3 2022	Jul 2022 – Sep 2022	1,507
Q2 2022	Apr 2022 – Jun 2022	1,644
Q1 2022	Jan 2022 – Mar 2022	1,455
Q4 2021	Oct 2021 – Dec 2021	881
Q3 2021	Jul 2021 – Sep 2021	1,440
Q2 2021	Apr 2021 – Jun 2021	1,833
Q1 2021	Jan 2021 – Mar 2021	2,028



# The Connected Consumers' profiles



## **Generation Z**

Born between 1997 – 2006

Age 18 – 27



## **Generation Y (Millennials)**

Born between 1981 – 1996

Age 28 – 43



## **Generation X**

Born between 1960 – 1980

Age 44 – 64

# Key highlights

## 01.

### **Threads expansion beyond core user base**

Threads has experienced a significant surge in popularity during the second quarter of 2024. After Gen Z, this text-based platform has become increasingly appealing to Gen Y. This expansion across generational demographics demonstrates Threads' growing appeal and adaptability in the Vietnam market

*(Slides 9, 10)*

## 02.

### **The indispensability of TikTok for Vietnamese consumers**

This quarter marks a pivotal milestone for TikTok as it reached an all-time high in daily media consumption among Vietnamese users. The platform stands out as the only social media app showing consistent growth since Q1 2023. This underscores the importance of including TikTok in brand strategies

*(Slides 13, 14)*

## 03.

### **Drop in YouTube's share of media and entertainment consumption**

YouTube's performance has begun to decline this quarter, with the platform experiencing a decrease in both long and short-form video consumption, as well as movie and music streaming. This trend may indicate that Vietnamese users are shifting towards alternative channels, and the digital landscape for video entertainment is heating up

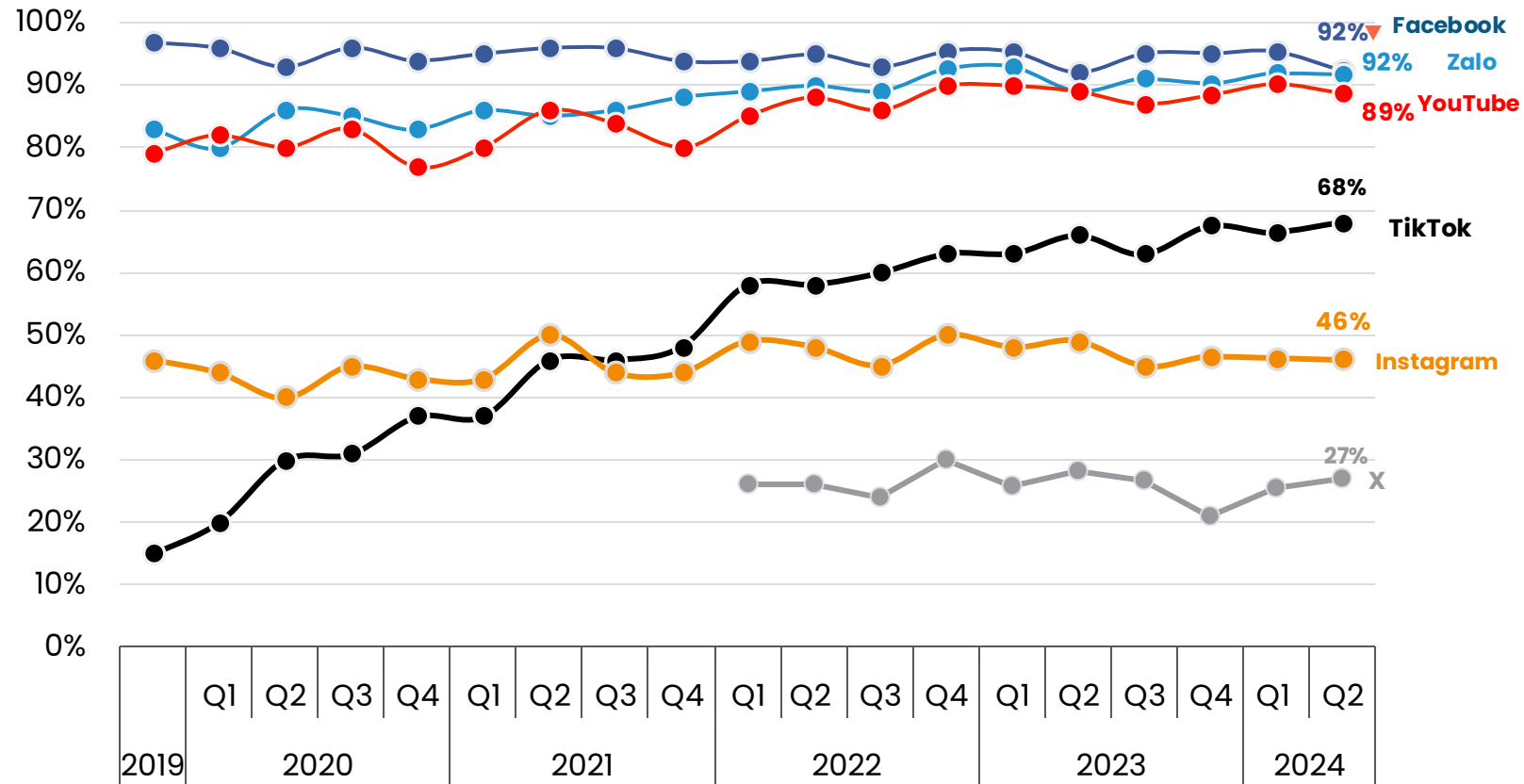
*(Slides 22, 23, 24, 25, 28, 30, 32, 33)*

# Social Media Landscape





### Top social media platforms—Penetration rates (%)



**Facebook has experienced a significant decline in usage, now sharing the lead with Zalo.**

**Concurrently, TikTok and X have experienced growth, diversifying platform usage among Vietnamese consumers**

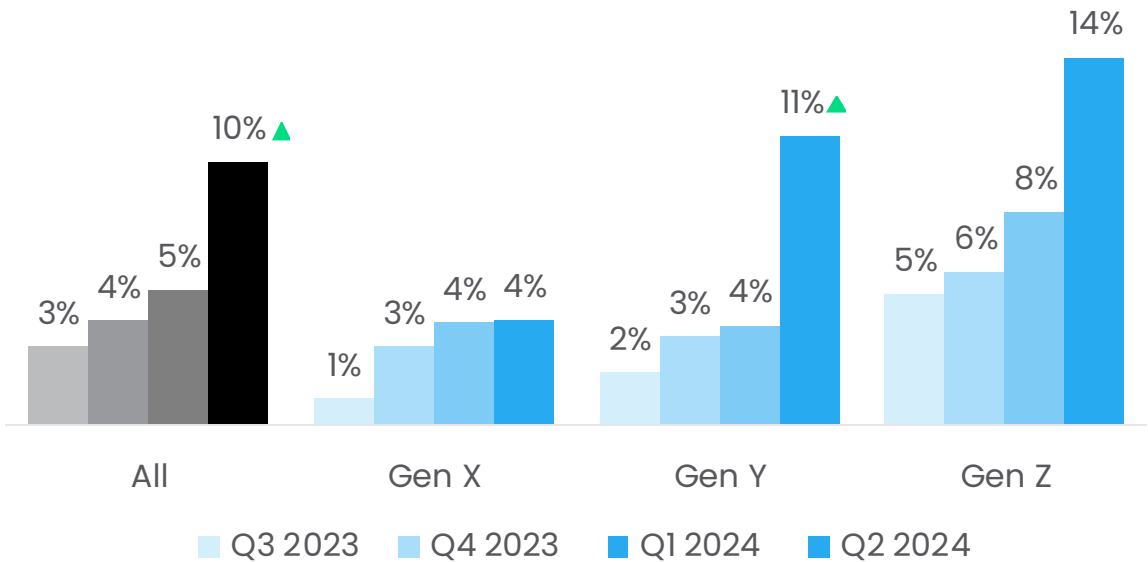
Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,478

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

▲ Increase significantly at 95% confidence level vs. Last quarter  
▼ Decrease significantly at 95% confidence level vs. Last quarter

### Threads' penetration (by generations)



Source: Decision Lab Connected Consumer Survey Q2 2024

Gen Z n=523  
Gen Y n=592  
Gen X n=363

Q Of the following, what social media platform do you use? You can choose multiple options.

▲ Increase significantly at 95% confidence level vs. Last quarter  
▼ Decrease significantly at 95% confidence level vs. Last quarter

Threads has experienced a remarkable surge in popularity, especially among Gen Y. This shift in user demographics suggests that the platform's appeal has expanded beyond its initial Gen Z base, increasing the relevance of text-based social media for older age groups in the current digital landscape

**On average, Gen Y and Gen Z have indicated a reliance on 3 apps for their daily needs, while Gen X only need 2 apps**

Average number of social media platforms used by Generation



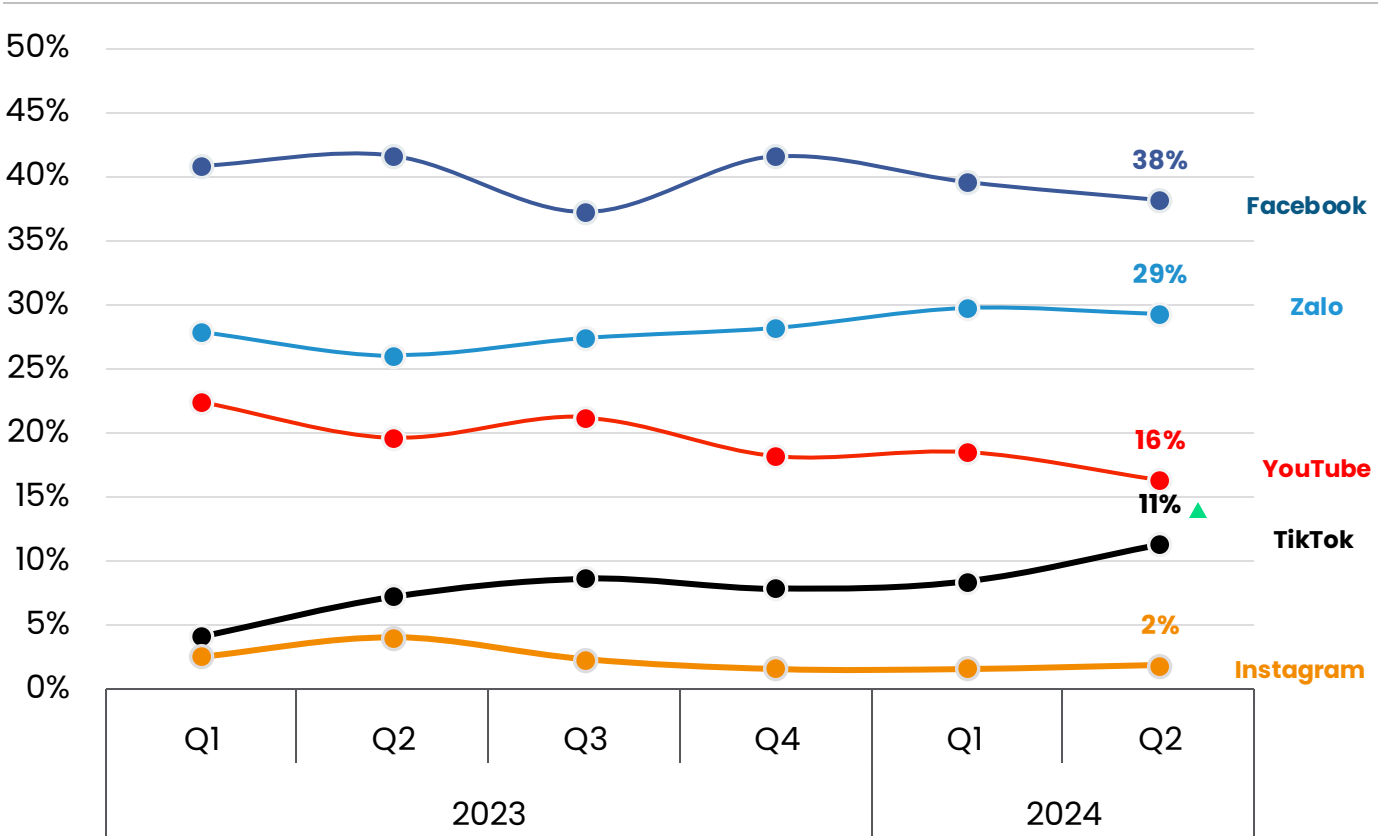
Source: Decision Lab Connected Consumer Survey Q2 2024

Q What social media platform do you think you can't live without ? You can select multiple options.



**TikTok's indispensability  
has reached a new peak in  
Q2 2024, cementing its  
growing influence on  
Vietnamese media  
consumption patterns**

Top primary apps



Source: Decision Lab Connected Consumer Survey Q2 2024

n = 1,192

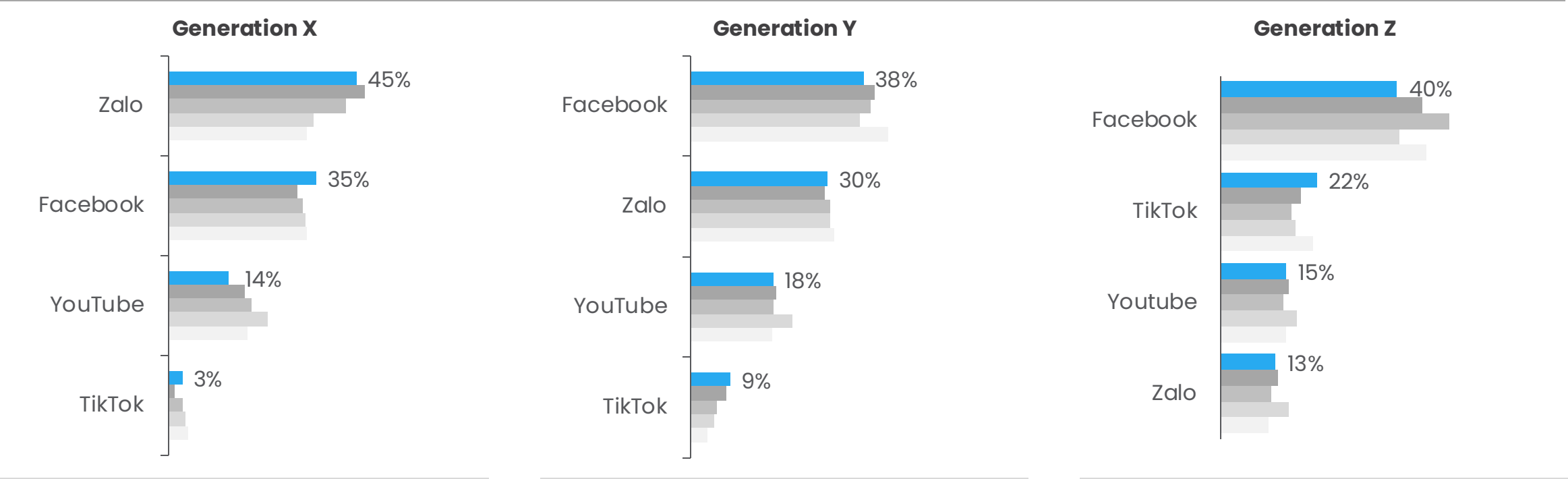
● If you can only use one social media platform, which platform will you select?

▲ Increase significantly at 95% confidence level vs. Last quarter  
▼ Decrease significantly at 95% confidence level vs. Last quarter



# The growth in TikTok's popularity has been primarily driven by Gen Z, making the platform surpass YouTube within this demographic

Top primary platforms (by generations)



Source: Decision Lab Connected Consumer Survey Q2 2024

n=279

n=474

n=439

Q If you can only use one social media platform, which platform will you select?

Q2 2024 Q1 2024 Q4 2023 Q3 2023 Q2 2023

# Summary

## Key takeaways

- In Q2 2024, the text-based social media platform Threads has experienced a significant surge in popularity, expanding its user base beyond Gen Z to include Gen Y. The growing adoption of Threads highlights the app's growing suitability to the Vietnamese users
- TikTok has become increasingly central to audience lives, with Gen Z leading its rapid adoption. This demographic has established TikTok as an indispensable platform, solidifying its position in the overall media consumption landscape



## Implications

- **Seize the opportunity on Threads:** As Threads gains popularity across generations in Vietnam, businesses should capitalise on the platform's early-stage incentives. Establishing a strong presence now can drive brand awareness, engagement, and conversions while opportunities are ripe
- **Invest in short-form video content:** It is crucial for brands to understand consumer insights regarding TikTok trends, challenges, and popular sounds. This will help create content that resonates with younger generations, ensuring relevance and engagement

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OOH

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# Platforms by activities



Casual browsing

Entertainment videos

Short videos

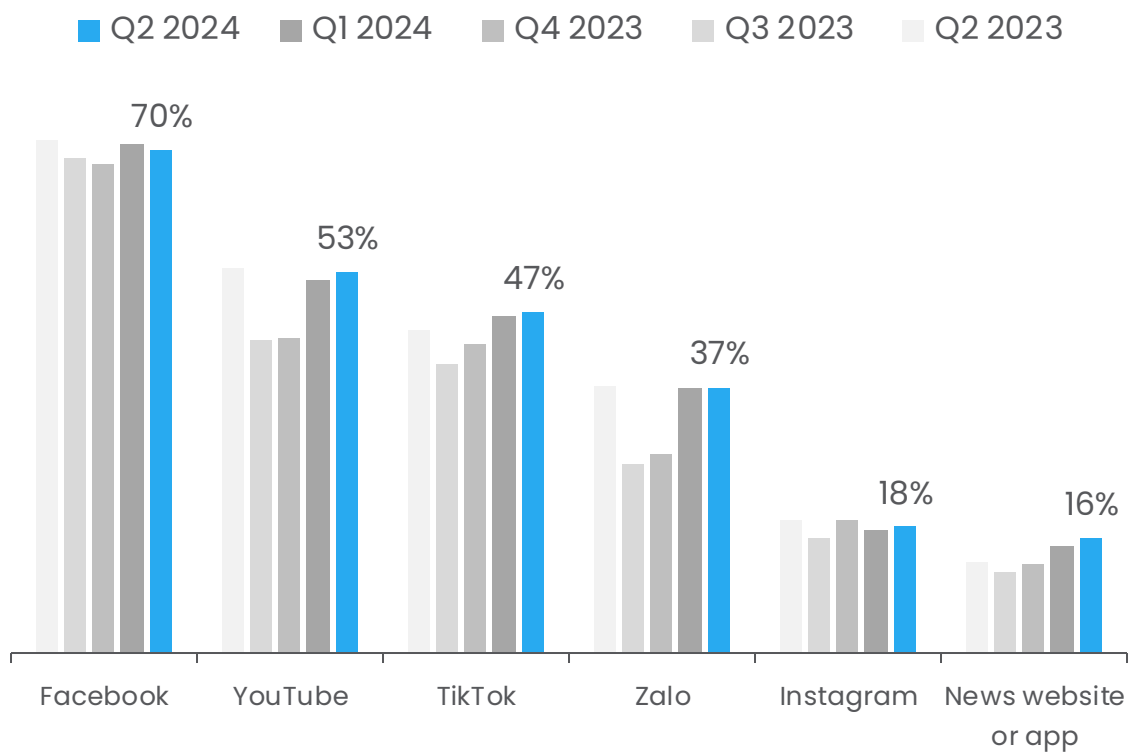
Movie streaming

Music streaming

News

Livestreaming

Top platforms for mindless browsing – Penetration rate (%)



Source: Decision Lab Connected Consumer Survey Q2 2024 n=1,478

Q When you browse websites or apps without any specific purpose, which website or app did you use? Choose all that apply.

Casual browsing

Facebook maintains its position as the top platform for mindless scrolling.

However, the gradual increase in news website usage has suggested a trend of informative content consumption when feeling bored

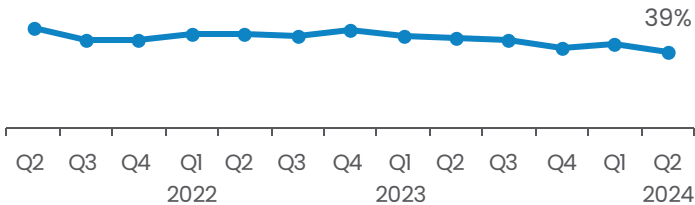
# Facebook's preference has experienced a slight decline, while TikTok and YouTube have made no significant changes this quarter

Top platforms for mindless browsing – Preference rate (%)

## Facebook

Q2 2024

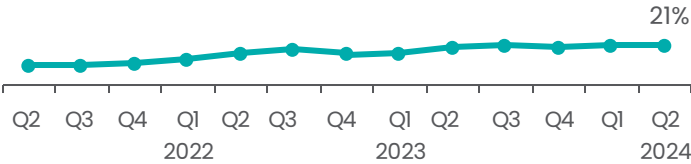
39% (-4%)



## TikTok

Q2 2024

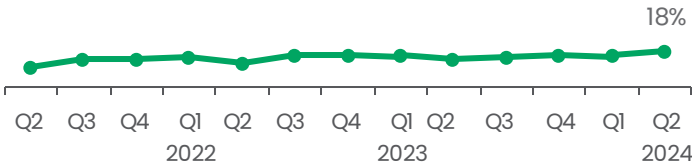
21% (+0%)



## YouTube

Q2 2024

18% (+3%)



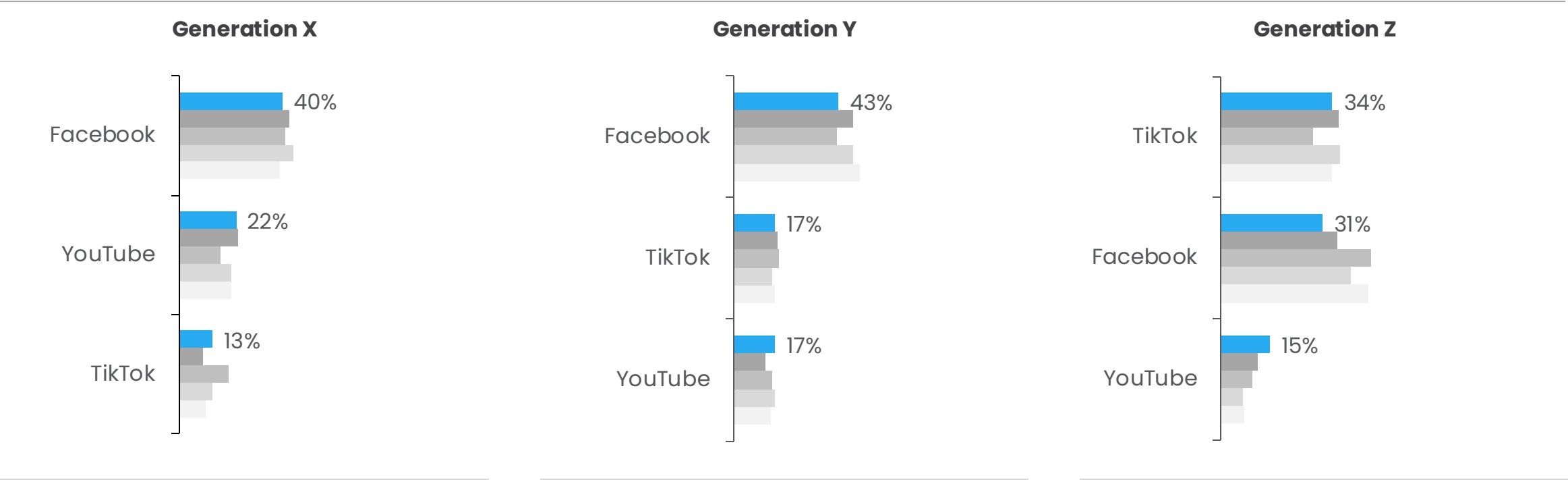
Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,411

Q When you browse websites or apps without any specific purpose, which website or app did you use the most?

# Facebook continues to lead among Gen X and Gen Y. However, its popularity has waned among Gen Z, highlighting TikTok's rising influence in this group

Top platforms for mindless browsing – Preference rate (%) by generations



Source: Decision Lab Connected Consumer Survey Q2 2024

n=345

n=568

n=498

Q When you browse websites or apps without any specific purpose, which website or app did you use the most?

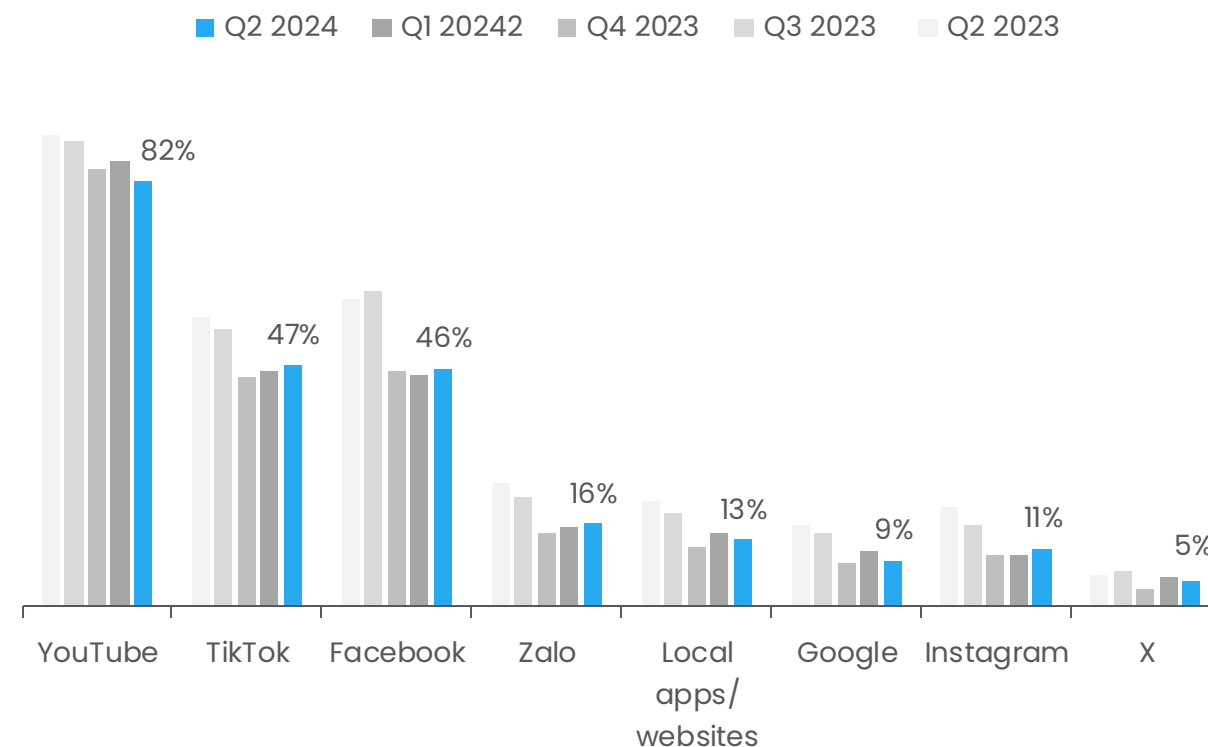
Q2 2024 Q1 2023 Q4 2023 Q3 2023 Q2 2023



## Entertainment videos

Although the top three platforms remain consistent with the last quarter, YouTube has experienced a slight decrease in usage. Additionally, TikTok and Facebook are competing fiercely for second place, implying the importance of monitoring user trends to keep up with evolving change in entertainment consumption

### Top platforms for entertainment videos-Penetration rate (%)



Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,478

Q Which websites/apps do you use to watch music or entertainment videos? Choose all that apply.

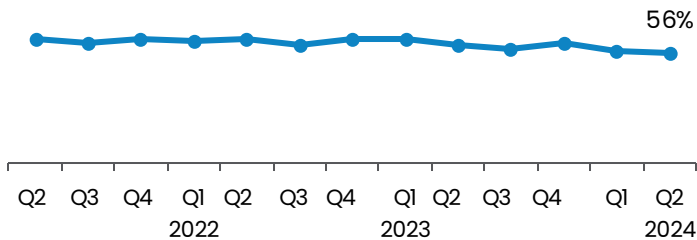
# YouTube's declining popularity since the beginning of 2024 has further intensified the competition from TikTok and Facebook in the entertainment sector

Top platforms for entertainment videos – Preference rate (%)

## YouTube

Q2 2024

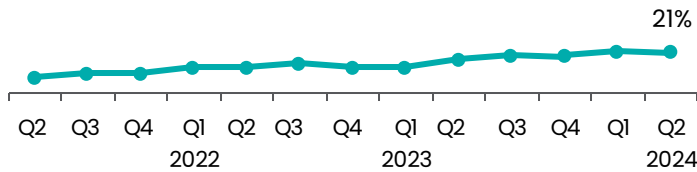
56% (-2%)



## TikTok

Q2 2024

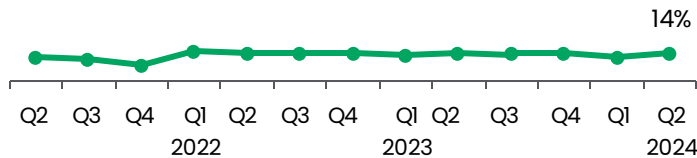
21% (+0%)



## Facebook

Q2 2024

14% (+2%)



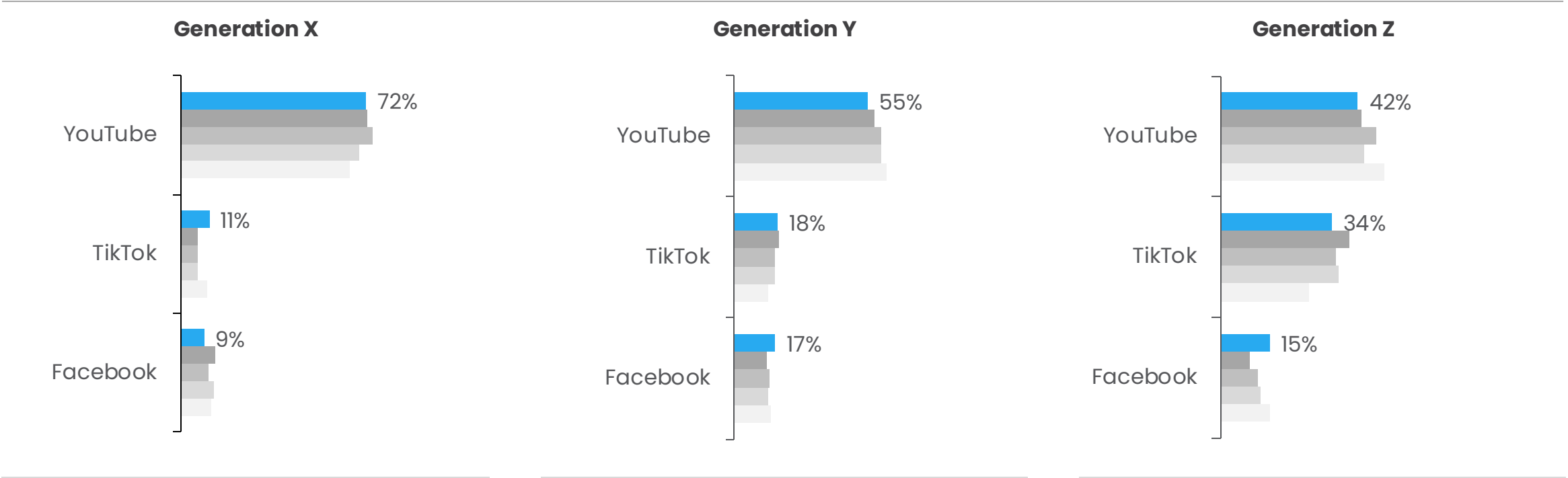
Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,469

Q Which websites/apps do you use most frequently to watch music or entertaining videos?

# YouTube has received the most prevalence among Gen X group, while TikTok is conquering the hearts of Gen Z

Top platforms for entertainment videos – Preference rate (%) by generations



Source: Decision Lab Connected Consumer Survey Q2 2024

n=361

n=591

n=517

Q Which websites/apps do you use most frequently to watch music or entertaining videos?

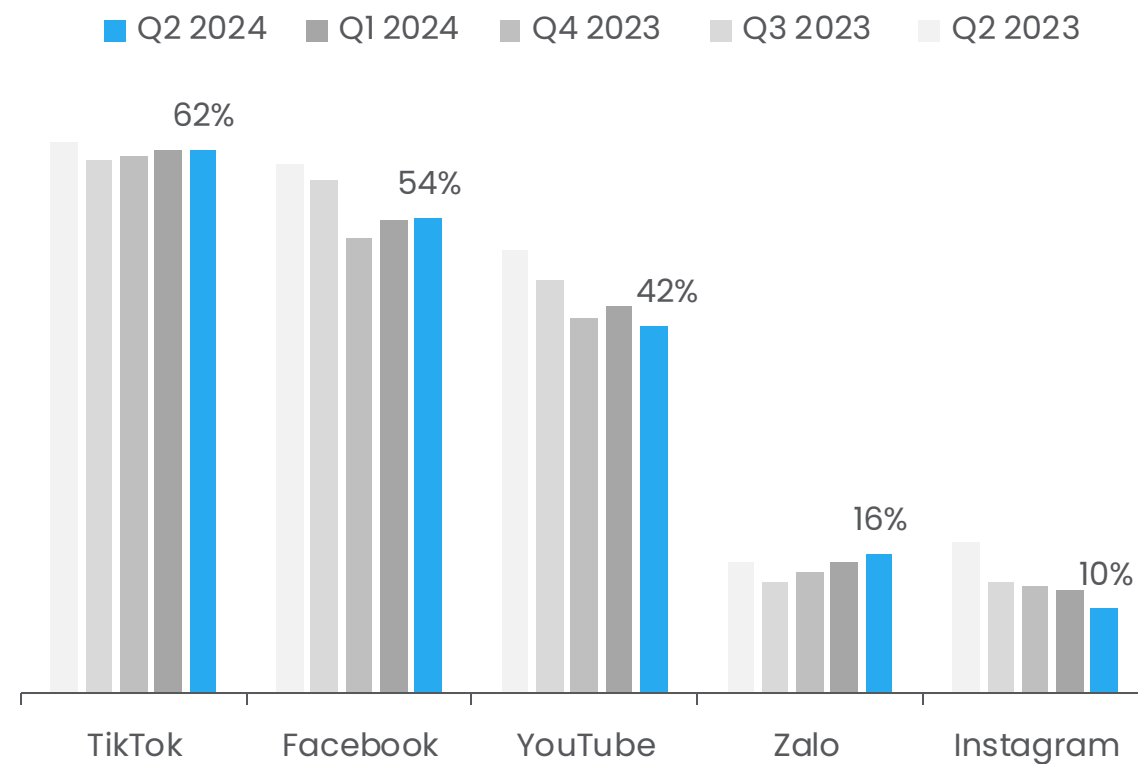
■ Q2 2024 ■ Q1 2024 ■ Q4 2023 ■ Q3 2023 ■ Q2 2023

## Short videos

TikTok has solidified its position as the dominant platform for short-form video content.

Interestingly, Zalo Video has exhibited sustained growth throughout the year, contrasting with Instagram Reels' ongoing decline in user engagement

### Top platforms for short videos – Penetration rate (%)



Source: Decision Lab Connected Consumer Survey Q2 2024

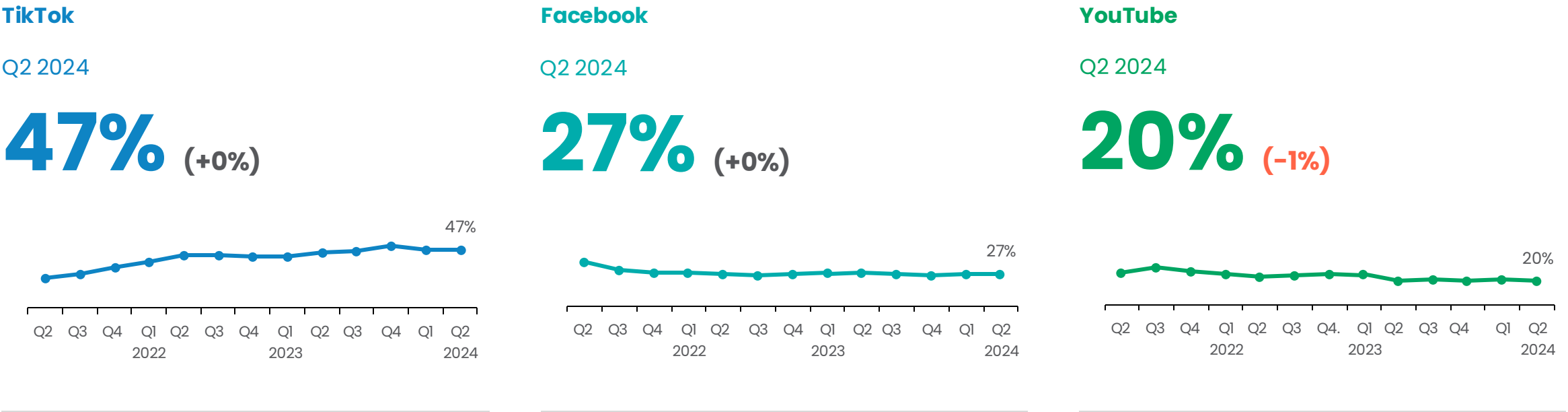
n=1,478

q Which websites/apps do you use to watch short videos (<3mins)? Choose all that apply.



# The top platforms for short video preferences remain stable, with TikTok continuing to dominate this category

Top platforms for short videos – Preference rate (%)



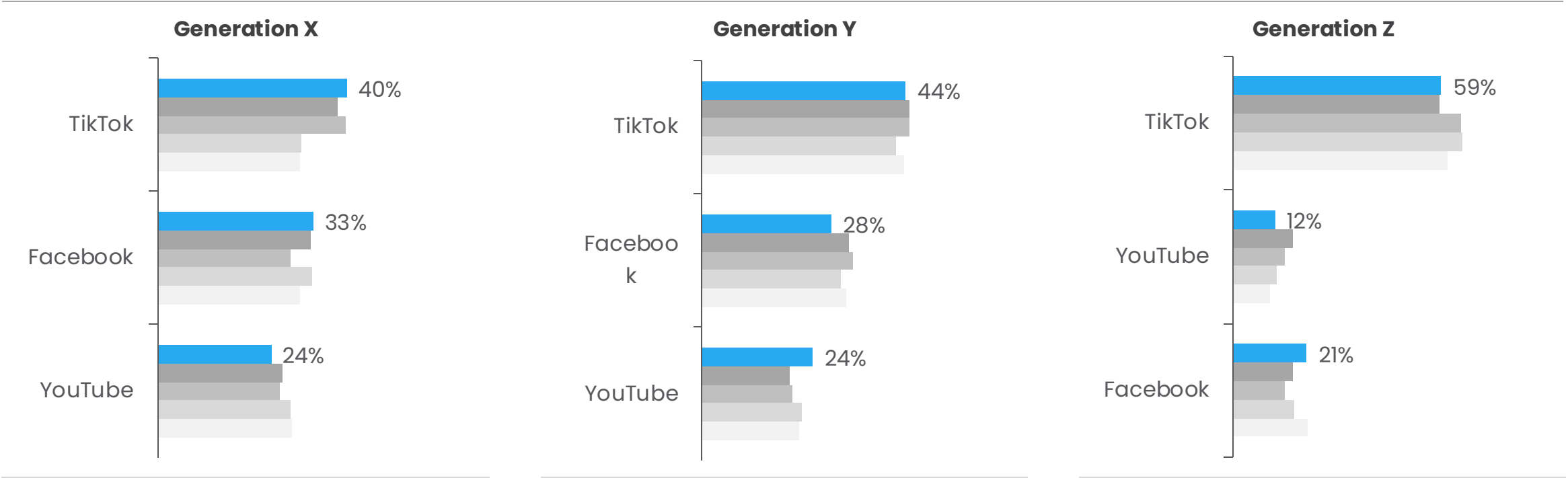
Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,465

Q Which websites/apps do you use most frequently to watch short videos (<3mins)?

# TikTok remains the preferred platform for short video consumption across all generations. Meanwhile, YouTube increasing in popularity among Gen Y and Facebook Reels gaining favor among Gen Z

Top platforms for short videos – Preference rate (%) by generations



Source: Decision Lab Connected Consumer Survey Q2 2024

n=362

n=584

n=519

Q Which websites/apps do you use most frequently to watch short videos (<3mins)?

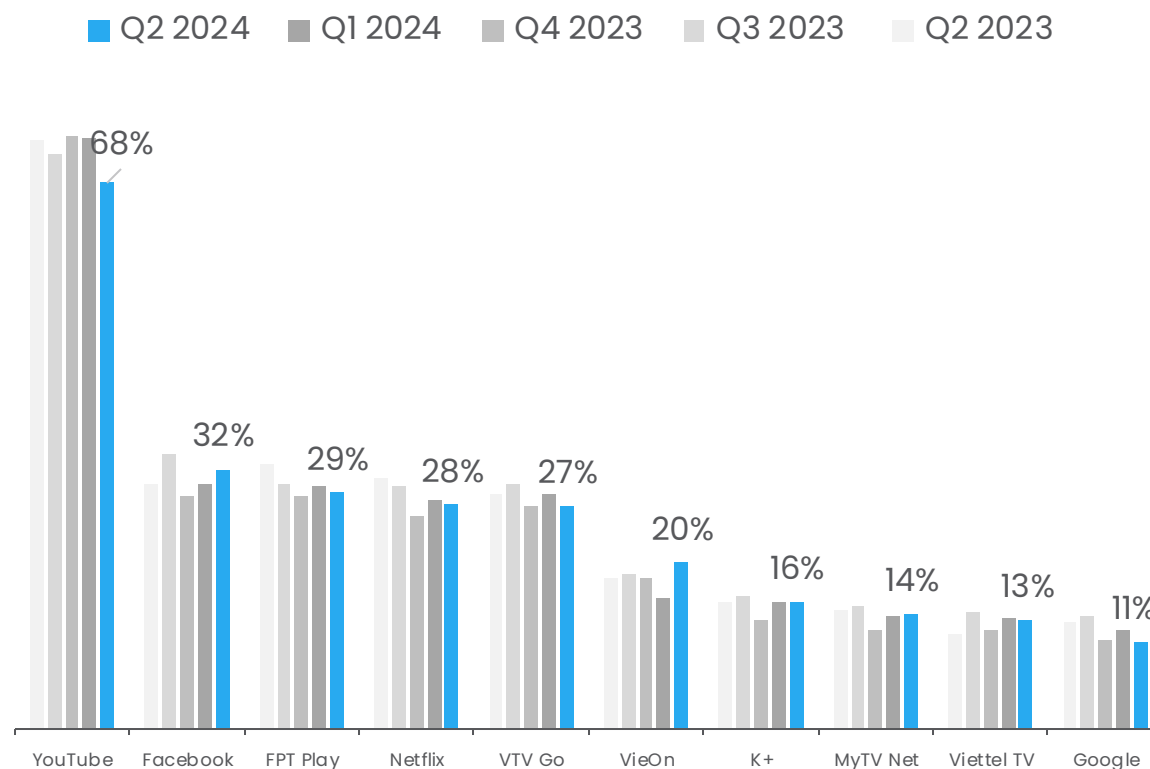
■ Q2 2024 ■ Q1 2024 ■ Q4 2023 ■ Q3 2023 ■ Q2 2023

## Movie streaming

The movie streaming landscape has remained relatively stable.

Within that, YouTube has observed a slight downturn in usage, while local player VieOn has demonstrated notable growth, possibly influenced by the release of popular TV shows

### Top platforms for movie streaming – Penetration rate (%)



Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,478

Q Which website/apps do you use to watch movies/TV shows? Choose all that apply.

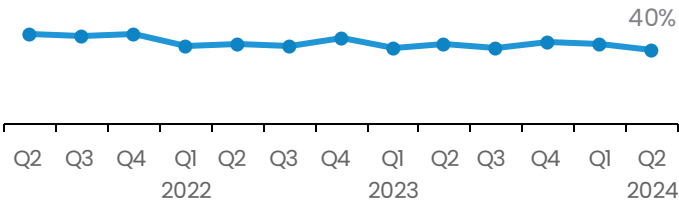
**YouTube's declining popularity, coupled with a slight uptick in local platform usage, indicates a growing preference for localised content. This trend suggests that domestic streaming services are gradually capturing the interest of viewers through their content offerings**

Top platforms for movie streaming – Preference rate (%)

YouTube

Q2 2024

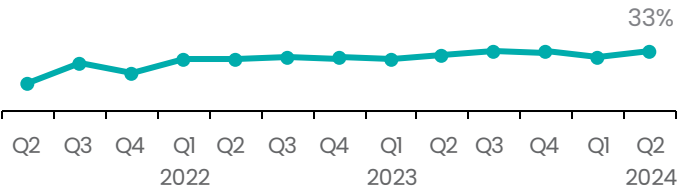
40% (-4%)



Local platforms\*

Q2 2024

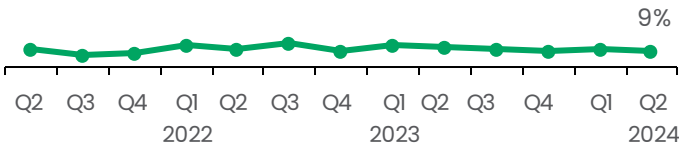
33% (+3%)



Netflix

Q2 2024

9% (-1%)



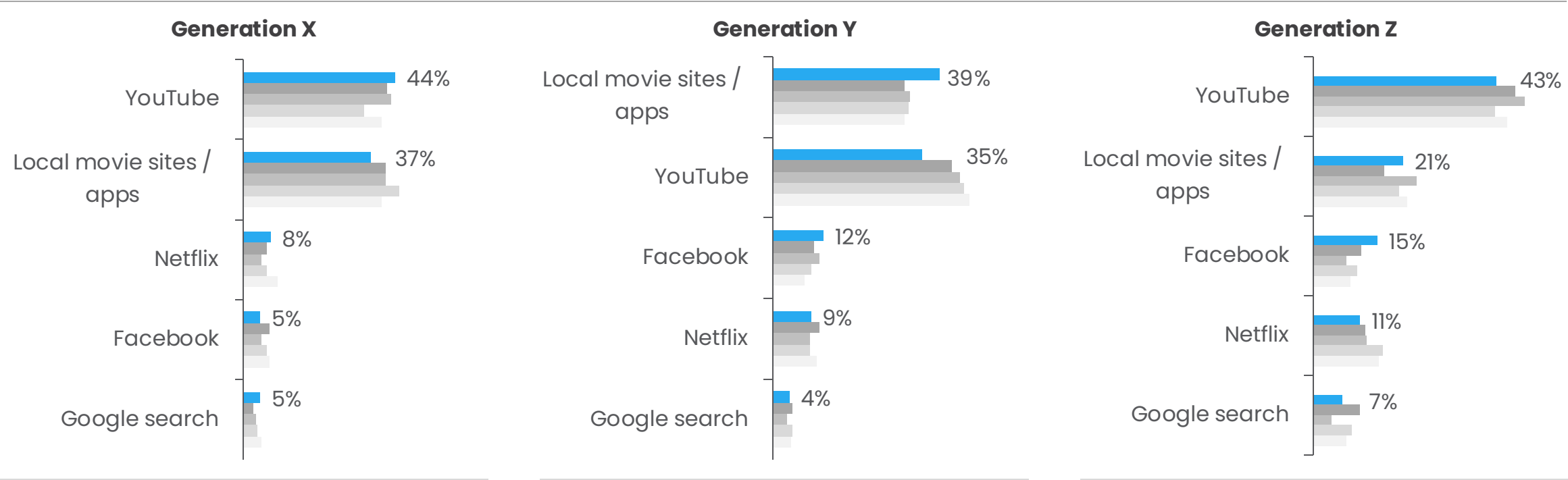
Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,445

Q Which of the following apps do you use most often to watch movies? \*Local platforms include: FPT Play, VTV Go, Keeng, MyTV Net, Viettel TV, Fim+/Galaxy Play, & VieON

# YouTube's popularity has declined significantly among Gen Y. Simultaneously, local streaming platforms have gained traction among younger demographics

Top platforms for movie streaming – Preference rate (%) by generations



Source: Decision Lab Connected Consumer Survey Q2 2024

n=357

n=582

n=506

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

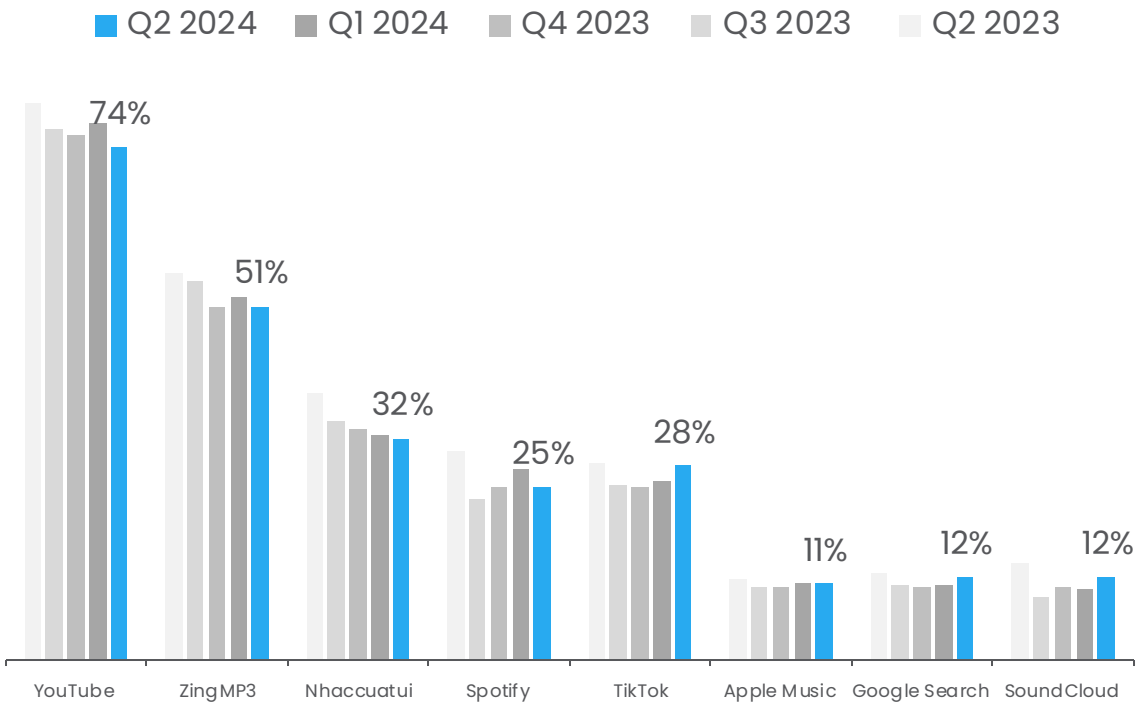
■ Q2 2024 ■ Q1 2023 ■ Q4 2023 ■ Q3 2023 ■ Q2 2023



# Music streaming

The music streaming landscape has maintained overall stability, despite a decline in user penetration across most platforms

Top platforms for music streaming – Penetration rate (%)



Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,478

Q Which apps or websites do you use to listen to music? Choose all that apply.

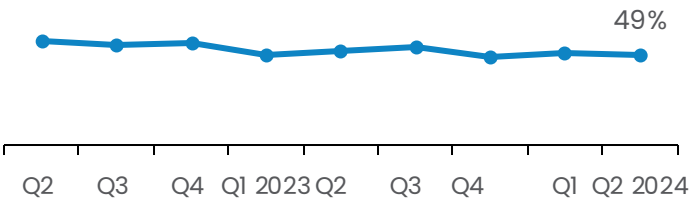
# YouTube has experienced a decline in popularity, yet it maintains a substantial lead over its closest competitor in the music streaming sector

Top platforms for music streaming – Preference rate (%)

## YouTube

Q2 2024

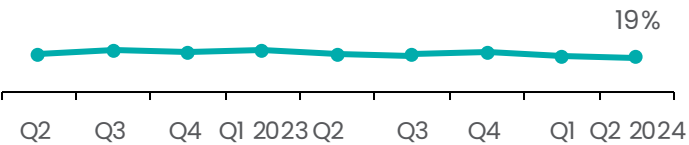
49% (-2%)



## ZingMP3

Q2 2024

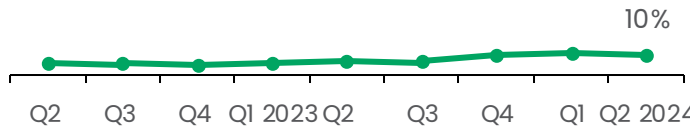
19% (+0%)



## Spotify

Q2 2024

10% (-2%)



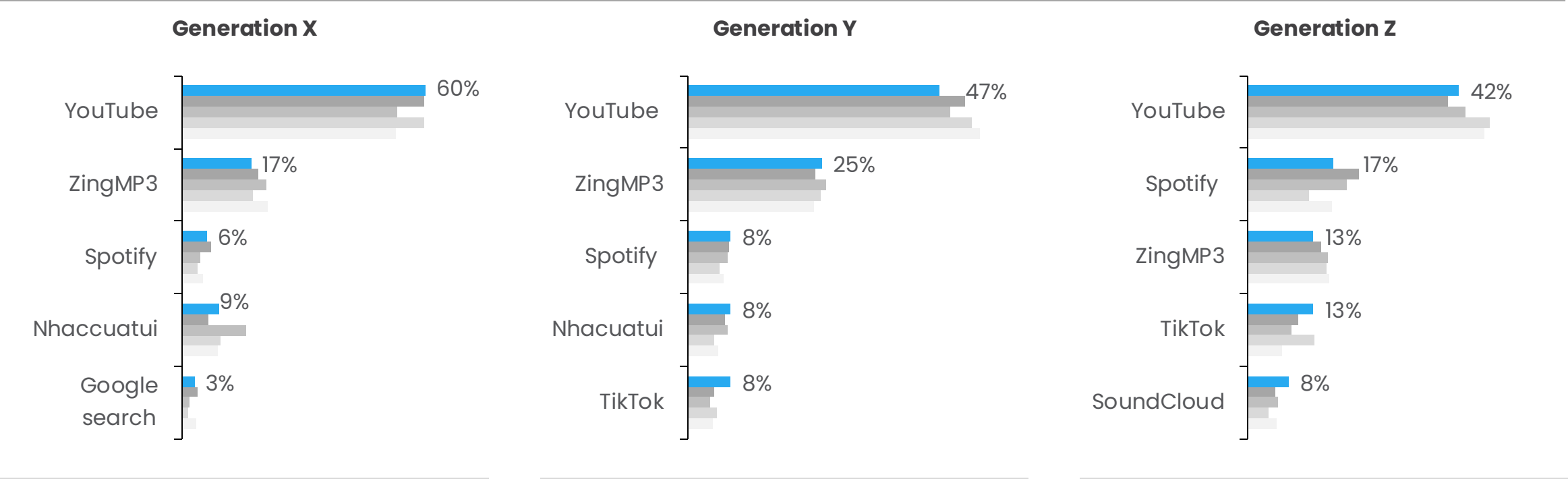
Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,465

Q Which of the following apps or websites do you use most often to listen to music?

However, TikTok has emerged as a strong competitor, particularly among the young groups, while Spotify has experienced a slight decline in popularity with Gen Z

Top platforms for music streaming – Preference rate (%) by generations



Source: Decision Lab Connected Consumer Survey Q2 2024

n=358

n=588

n=519

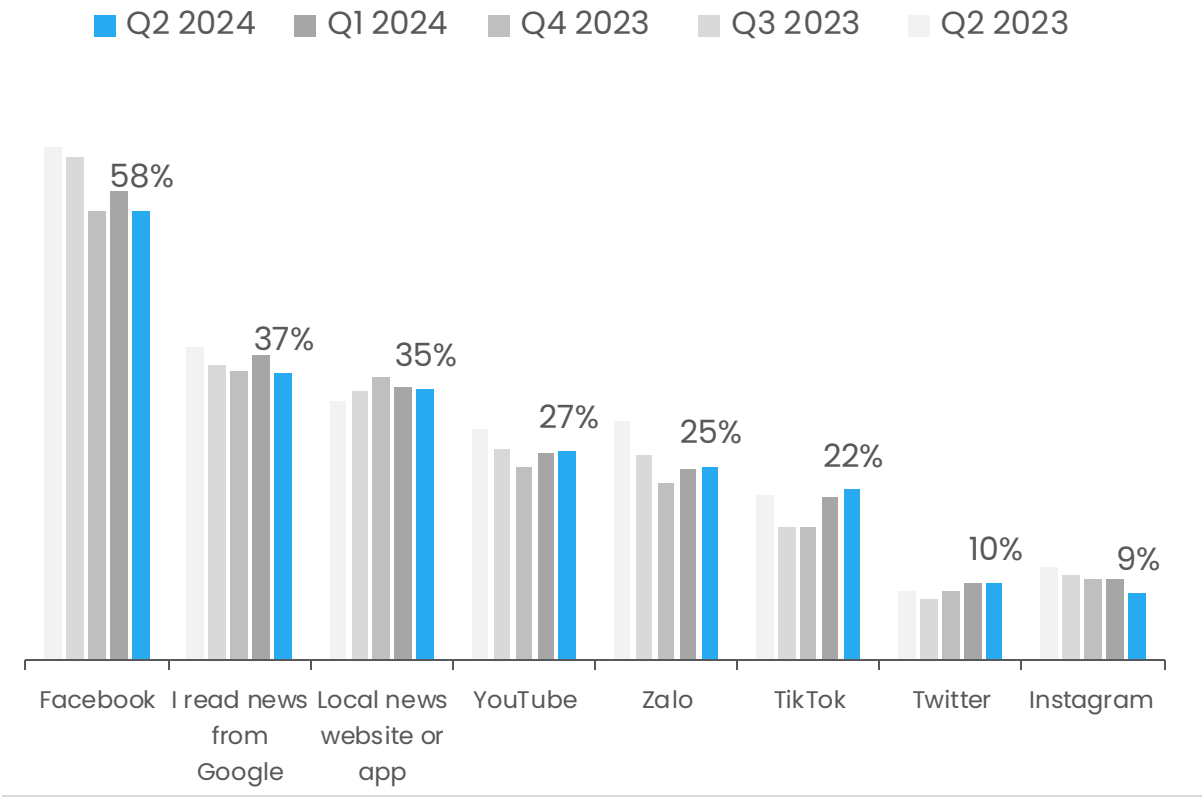
Q Which of the following apps or websites do you use most often to listen to music?

■ Q2 2024 ■ Q1 2023 ■ Q3 2023 ■ Q2 2023 ■ Q1 2023

# News

News consumption patterns remained relatively stable this quarter. However, TikTok’s role as a news source continued to grow, reinforcing the behavior of consuming information via short-form video. Notably, X (formerly Twitter) has replaced Instagram among the top news platforms

Top platforms for news—Penetration rate (%)



Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,478

q Which websites/apps do you use to read news? Choose all that apply.

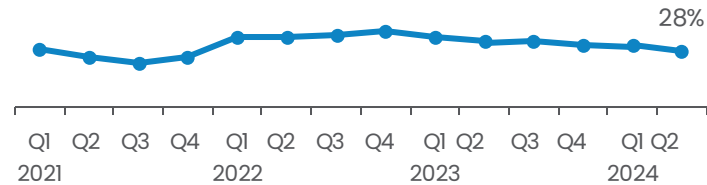
# The leading top news sources remain the same; however, Facebook has observed a slight decrease in user preference

Top platforms for news – Preference rate (%)

Facebook

Q2 2024

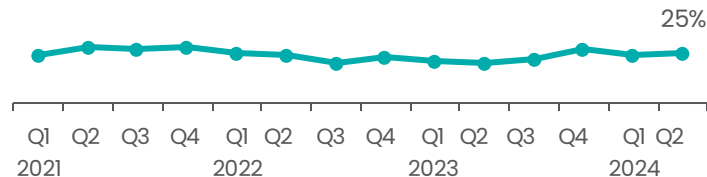
28% (-4%)



Local publishers

Q2 2024

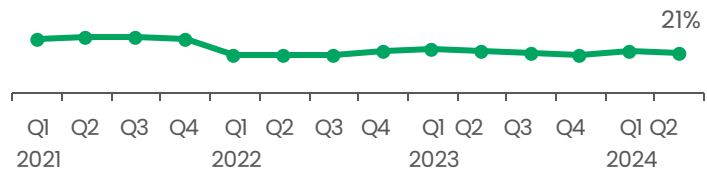
25% (+1%)



Google search

Q2 2024

21% (-1%)



Source: Decision Lab Connected Consumer Survey Q2 2024

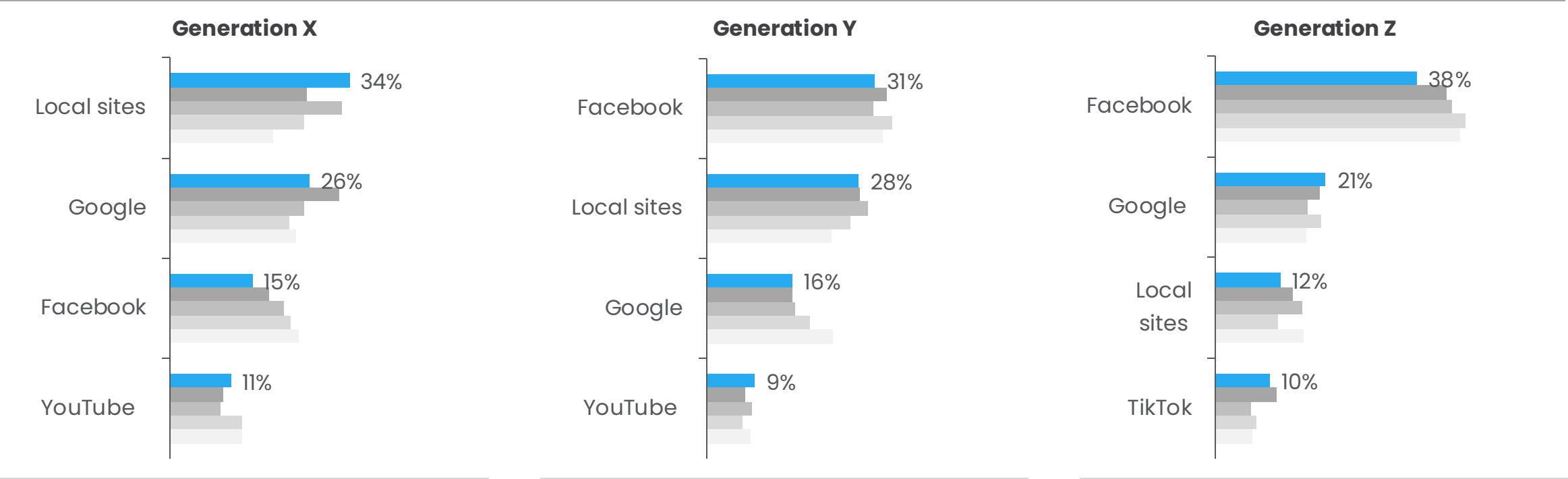
n=1,443

Q Which websites/apps do you use most often to read news?



# Facebook’s dominance in news consumption among younger generations has gradually decreased. Meanwhile, local news sites have surged in popularity among Gen X, overtaking Google as their primary news source

Top platforms for news – Preference rate (%) by generations



Source: Decision Lab Connected Consumer Survey Q2 2024 n=363

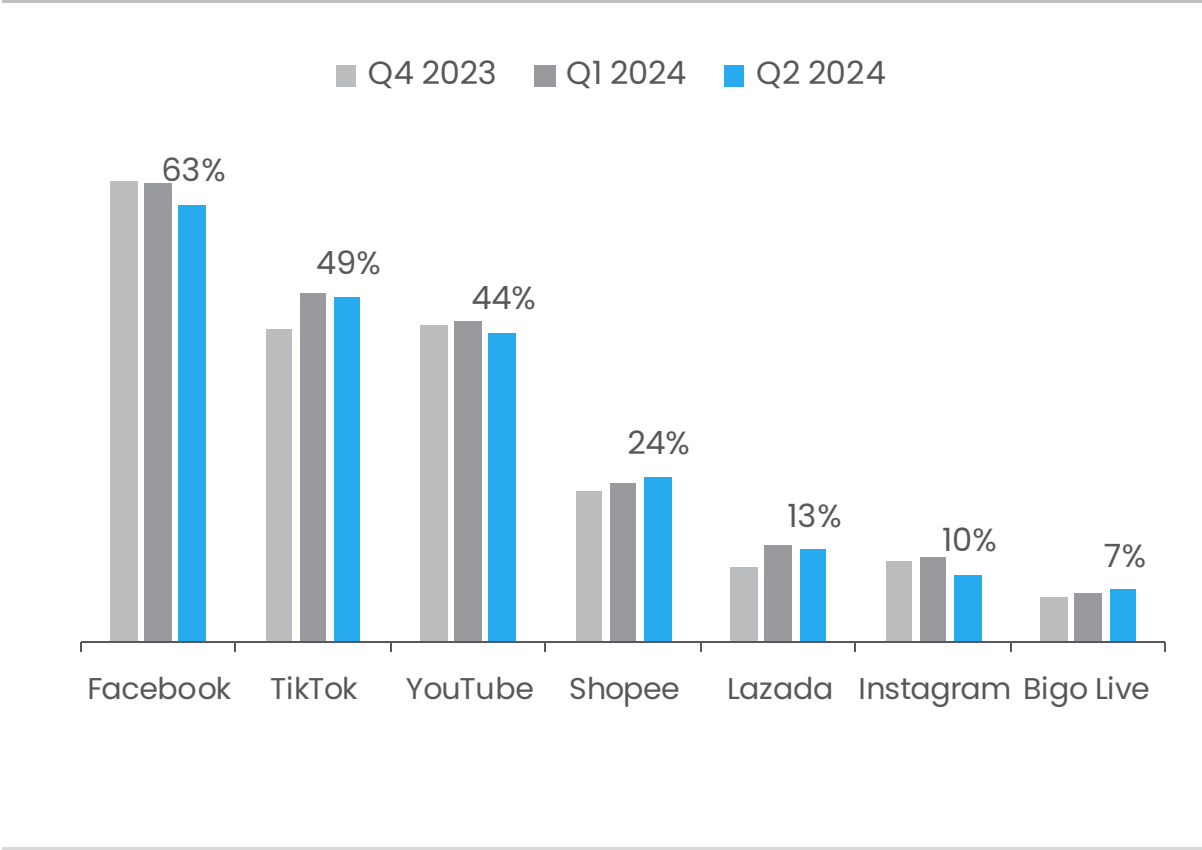
n=581

n=499

Q Which websites/apps do you use most often to read news?

■ Q2 2024 ■ Q1 2024 ■ Q4 2023 ■ Q3 2023 ■ Q2 2022

Top platforms for livestreaming—Penetration rate (%)



Source: Decision Lab Connected Consumer Survey Q2 2024 n=1,478

Q Supposed you want to watch some livestreaming content, which website or app would you use? Select all that apply.

Livestreaming

The livestreaming landscape has remained unchanged compared to the last quarter, with Facebook leading the category even with its slight decrease in penetration

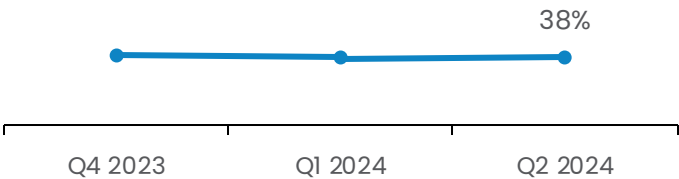
# Accordingly, the top preferred platforms to watch livestreaming content remain the same

Top platforms for livestreaming – Preference rate (%)

Facebook

Q2 2024

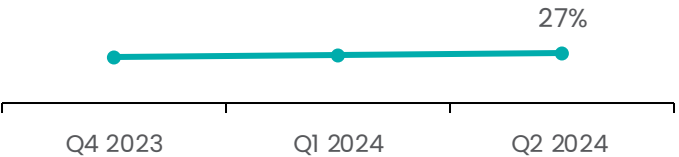
38% (+1%)



TikTok

Q2 2024

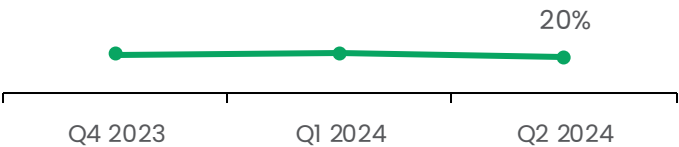
27% (+1%)



YouTube

Q2 2024

20% (-2%)



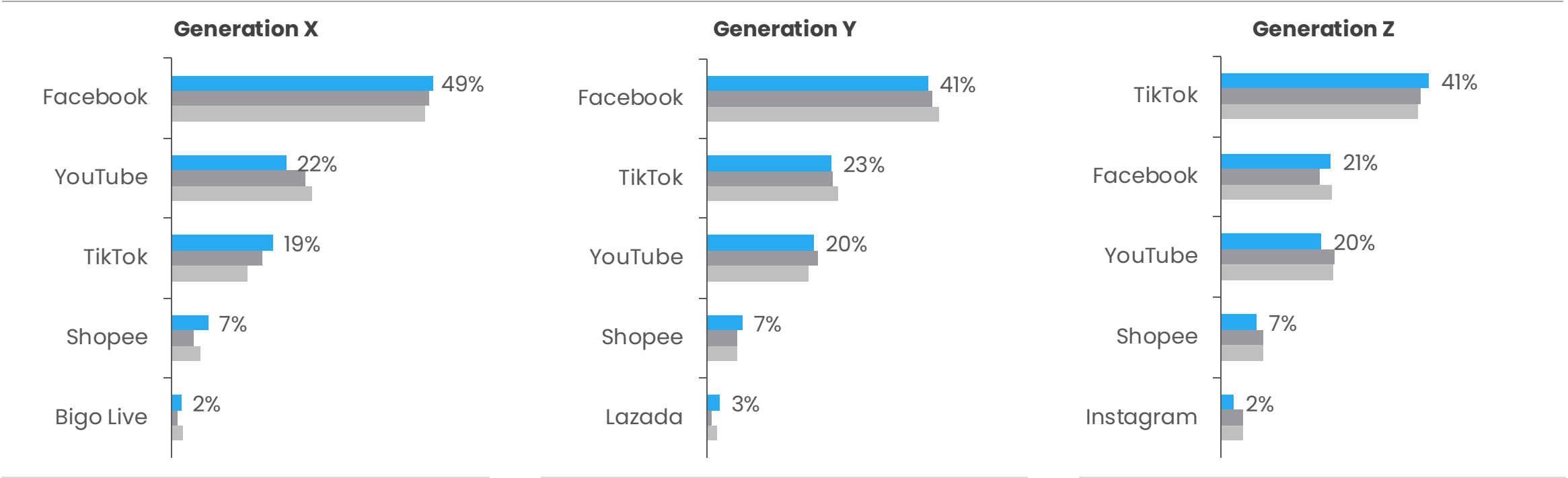
Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,395

Q Supposed you want to watch some livestreaming content, which website or app would you use most frequently?

**TikTok has emerged as the dominant platform for livestreaming among Gen Z, solidifying its favorability within this demographic. In contrast, older generations have gravitated towards Facebook for livestreaming, highlighting a clear generational divide in viewing preferences**

Top platforms for livestreaming – Preference rate (%) by generations



Source: Decision Lab Connected Consumer Survey Q2 2024

n=302

n=585

n=467

Q Supposed you want to watch some livestreaming content, which website or app would you use most frequently?

■ Q2 2024 ■ Q1 2024 ■ Q4 2023

# Summary

## Key takeaways

- Q2 2024 saw shifts in platform performance across various activities. In details:
  - YouTube's core strengths, which once positioned it as a leader in entertainment, have begun to diminish this quarter. The decline in YouTube's role for video and streaming services indicates that Vietnamese audiences are diversifying their media consumption and exploring alternative channels for entertainment
  - VieOn's overall improvement in Q2 2024 reflects a growing preference among Vietnamese viewers for locally produced TV shows and reality programs. This uptick suggests the changes of Vietnamese's taste for entertainment content



## Implications

- **Understand the consumer taste for content consumption:** With major platforms like YouTube losing traction to local competitors, it's evident that there's a rising demand for localized content. Brands need to delve into what resonates with their audience, including not only content themes but also formats and quality
- **Explore other advertising channels:** YouTube's waning dominance underscores the value of targeted advertising. Brands should investigate emerging platforms, such as local channels, to connect more effectively with their target audience, rather than relying on broad-based ads



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members  
in Vietnam



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attitudes, behaviours,  
and brand usage



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relevant data



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# Platforms by Utilities



Online shopping

Messaging

Digital finance

Food delivery

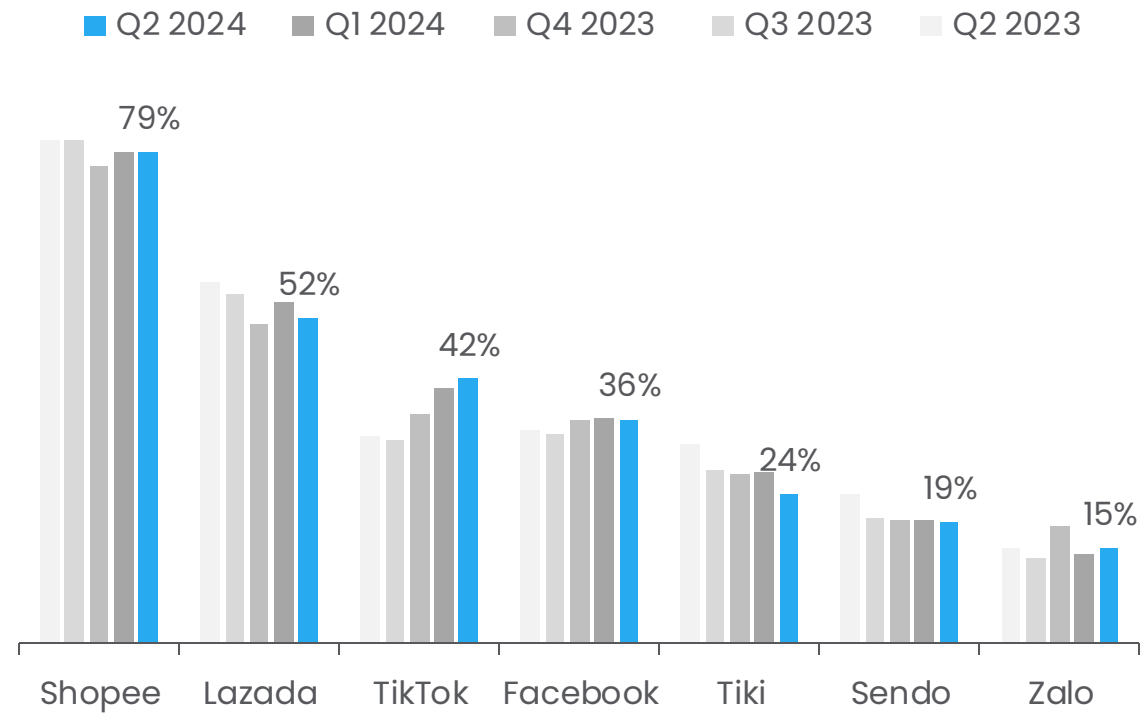
Ride-hailing



# Online shopping platforms

The online shopping category has remained stable compared to the previous quarter, with only Tiki having observed a notable decrease in usage

Top platforms for online shopping —Penetration rate (%)



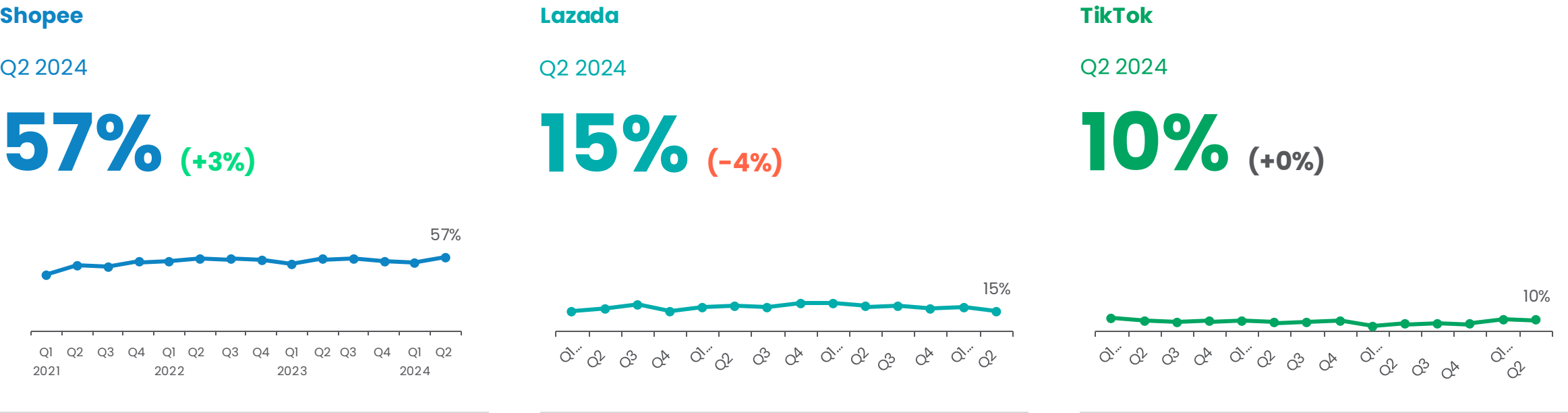
Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,478

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

# Despite the stability in the online shopping leaderboard, Lazada has observed a notable decrease in favorability

Top platforms for online shopping – Preference rate (%)



Source: Decision Lab Connected Consumer Survey Q2 2024

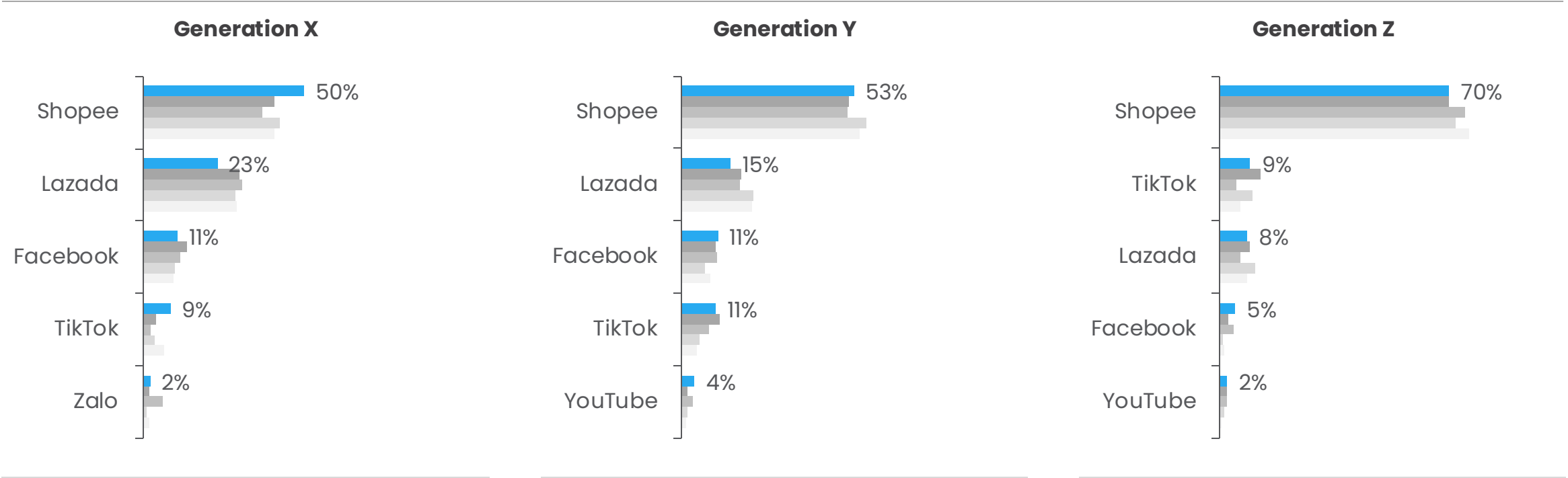
n=1,472

Q Which of the following platforms/apps do you use most often for online shopping?



# The decrease in preference for Lazada has originated from all generations. Meanwhile, Shopee and TikTok have been gaining traction among the oldest group, Gen X

Top platforms for online shopping – Preference rate (%) by generations



Source: Decision Lab Connected Consumer Survey Q2 2024

n=362

n=591

n=519

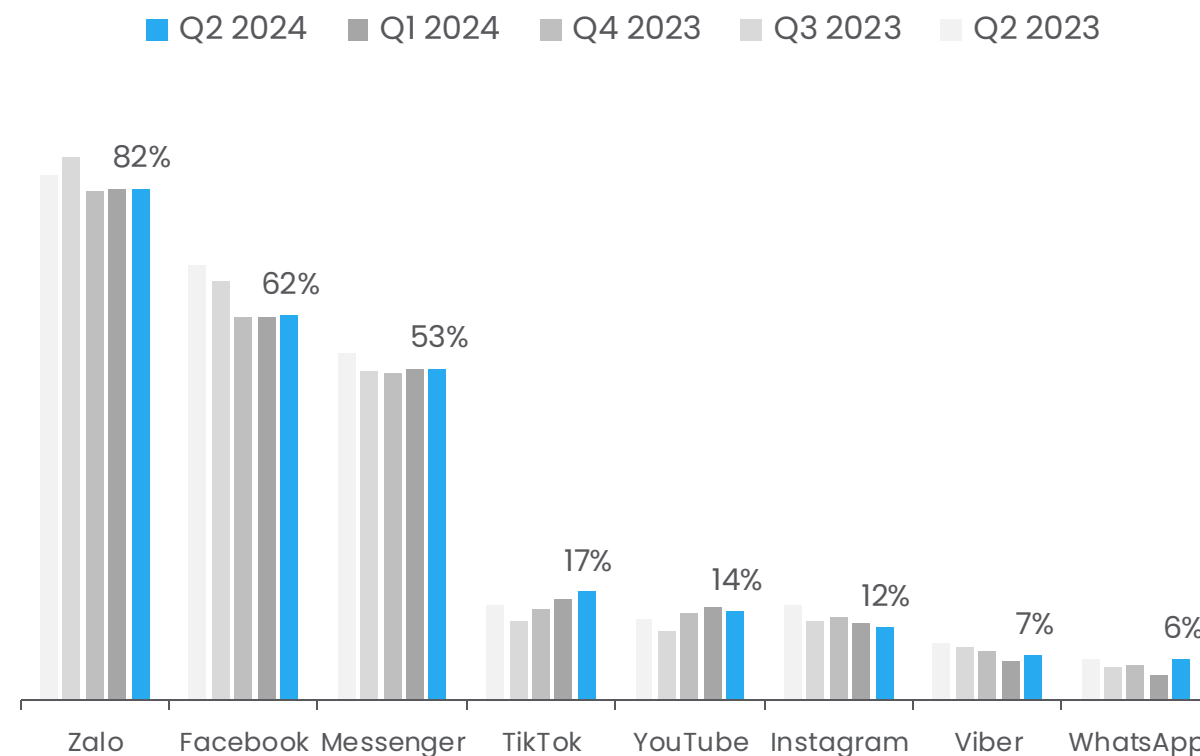
Q Which of the following platforms/apps do you use most often for online shopping?

■ Q2 2024 ■ Q1 2024 ■ Q4 2023 ■ Q3 2023 ■ Q2 2023

## Messaging platforms

Zalo and Facebook have remained Vietnam's leading platforms for casual messaging. Notably, Viber and WhatsApp have made a slight recovery on the leaderboard this quarter

### Top platforms for casual messaging —Penetration rate (%)



Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,478

Q Which websites/apps do you use to connect with friends and family? Choose all that apply.

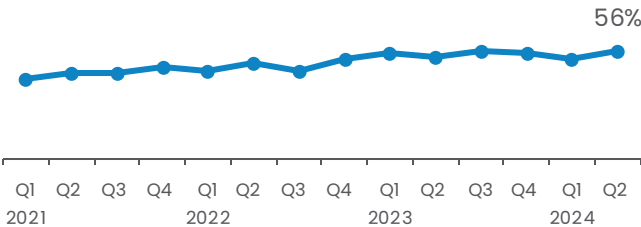
# Zalo has solidified its leading position in messaging utilities, registering a 4% increase in user preference. Meanwhile, Messenger and Facebook have been alternating for the second position

Top platforms for casual messaging – Preference rate (%)

Zalo

Q2 2024

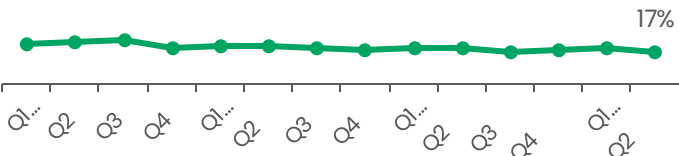
56% (+4%)



Messenger

Q2 2024

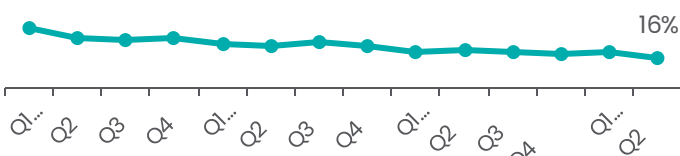
17% (-2%)



Facebook

Q2 2024

16% (-4%)



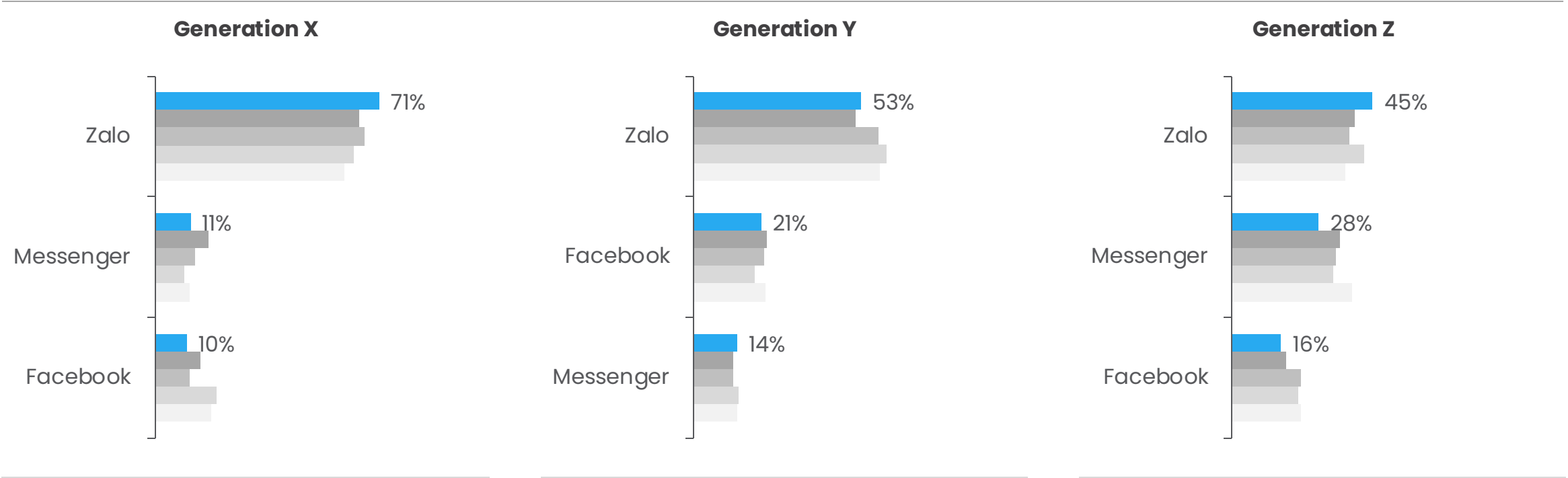
Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,467

Q Which of the following platforms/apps do you use most often for online shopping?

# Zalo's popularity has surged across generations. Conversely, Facebook has seen a decline in user preference across all groups, explaining its fall in the preference rankings this quarter

Top platforms for casual messaging – Preference rate (%) by generations



Source: Decision Lab Connected Consumer Survey Q2 2024

n=362

n=589

n=516

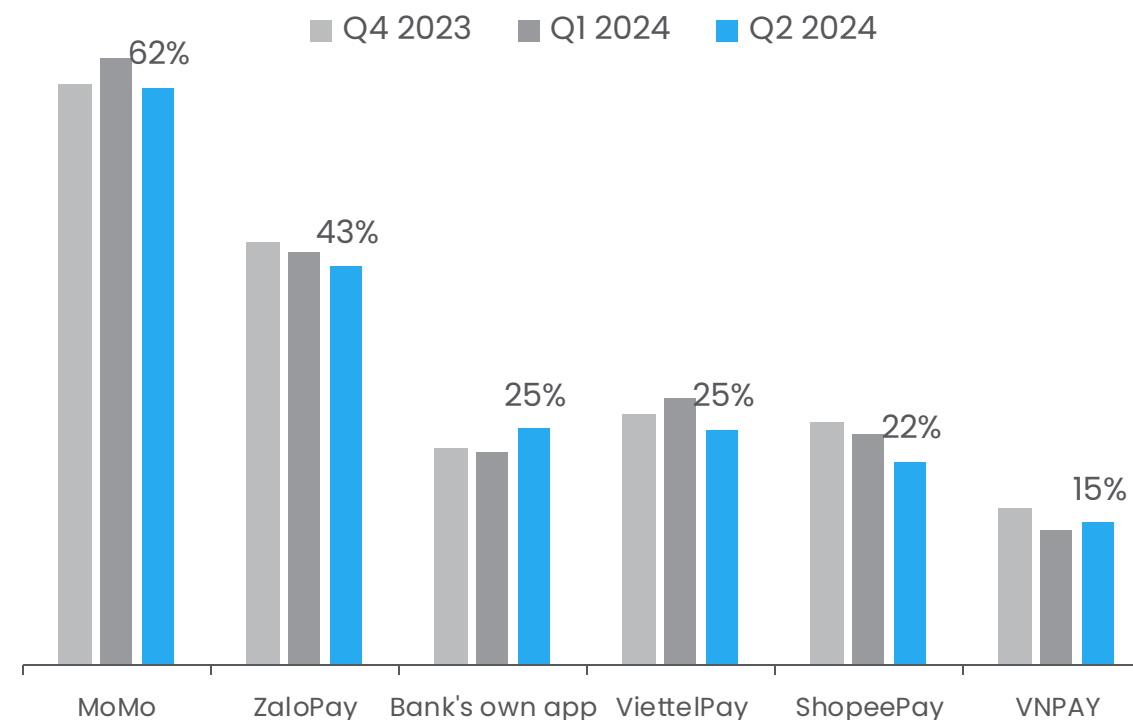
Q Which of the following platforms/apps do you use most often for online shopping?

■ Q2 2024 ■ Q1 2024 ■ Q4 2023 ■ Q3 2023 ■ Q2 2023

## Digital finance platforms

Despite a recent decline in usage across most platforms, the outlook for digital financial services remains positive, with MoMo maintaining its leadership

### Top digital financial platforms —Penetration rate (%)



Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,478

Q Which digital finance platforms do you use? Choose all that apply.

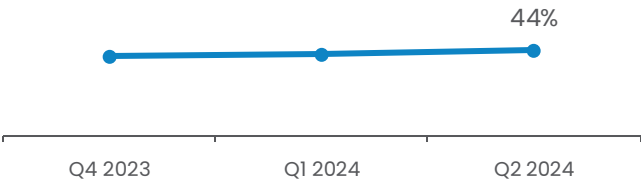
# User preference for MoMo has risen steadily in the digital finance market, solidifying its dominance and widening the lead over its competitors

Top platforms for digital finance – Preference rate (%)

MoMo

Q1 2024

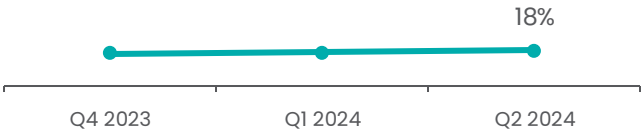
44% (+1%)



Bank's own app

Q1 2024

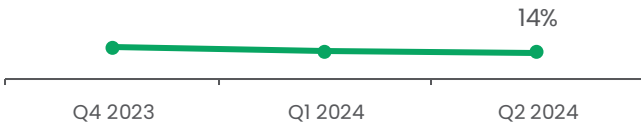
18% (+1%)



ZaloPay

Q1 2024

14% (+0%)



Source: Decision Lab Connected Consumer Survey Q2 2024

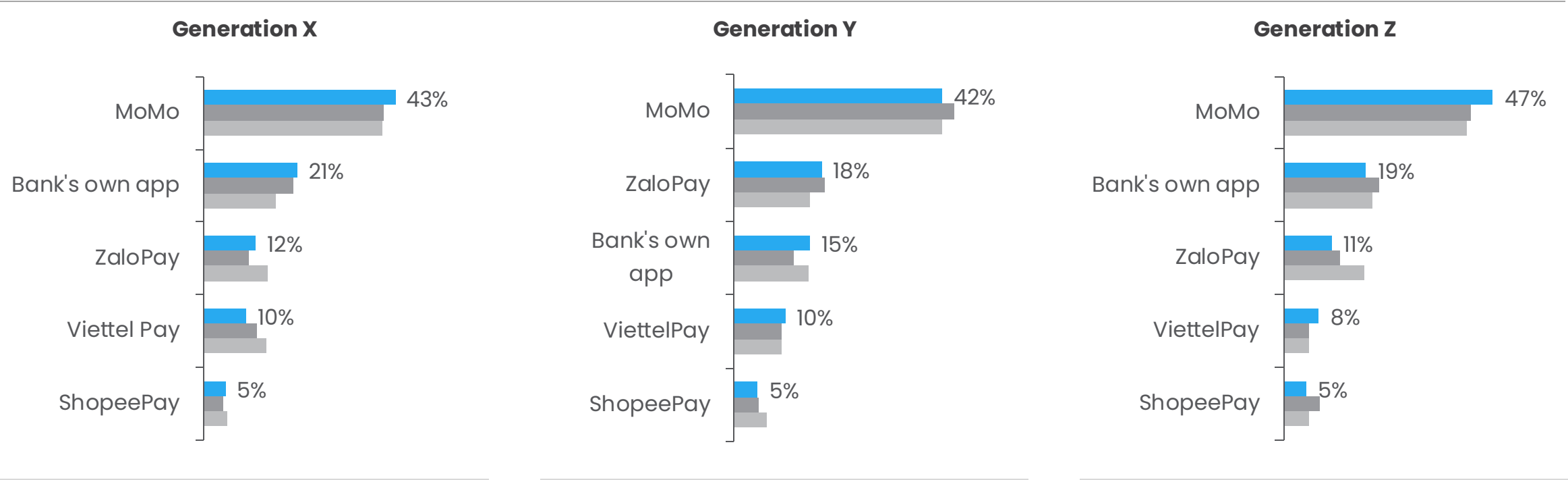
n=1,391

Q Which digital finance platforms do you use most often?



# Despite MoMo's leading position, ZaloPay has emerged as a strong contender, with significant preference from Gen Y and has reclaimed its position as the third favorite platform for Gen X

Top platforms for digital finance – Preference rate (%) by generations



Source: Decision Lab Connected Consumer Survey Q2 2024

n=294

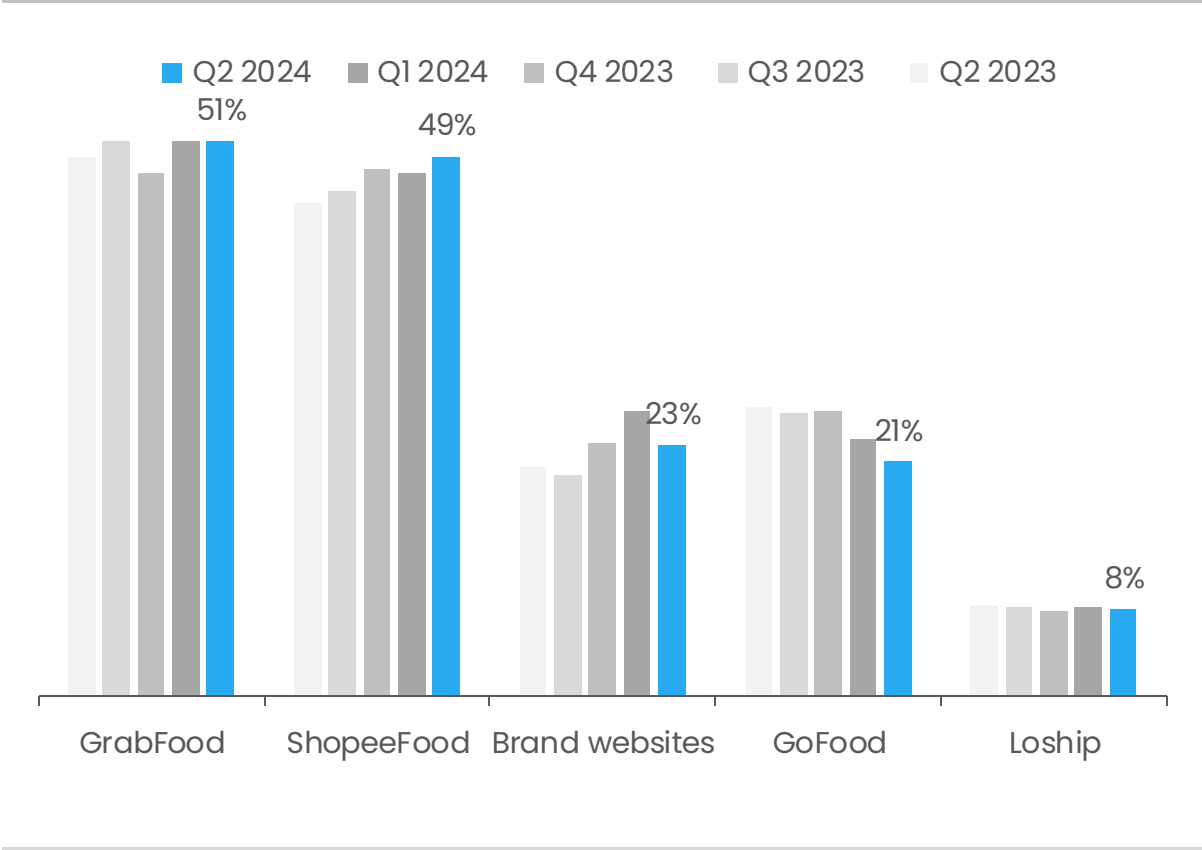
n=586

n=475

Q Which digital finance platforms do you use most often?

Q2 2024 Q1 2024 Q4 2023

Top platforms for food delivery—Penetration rate (%)



Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,478

q Which food delivery apps do you use? Choose all that apply.

# Food delivery platforms

The food delivery market has maintained its stability this quarter.

GrabFood's user base has remained steady, while ShopeeFood has seen an uptick in usage, suggesting that both platforms have solidified their joint leadership position in the category

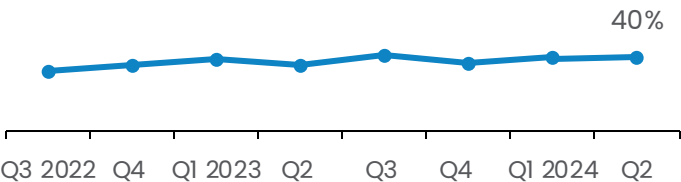
# ShopeeFood has seen a 2% rise in user preference for food delivery, narrowing the gap with GrabFood and making strides to capture consumers' hearts

Top platforms for food delivery – Preference rate (%)

GrabFood

Q2 2024

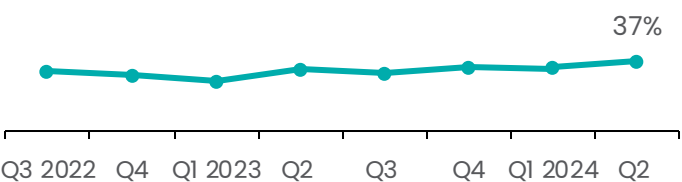
40% (+0%)



ShopeeFood

Q2 2024

37% (+2%)



Brand Websites

Q2 2024

12% (-2%)



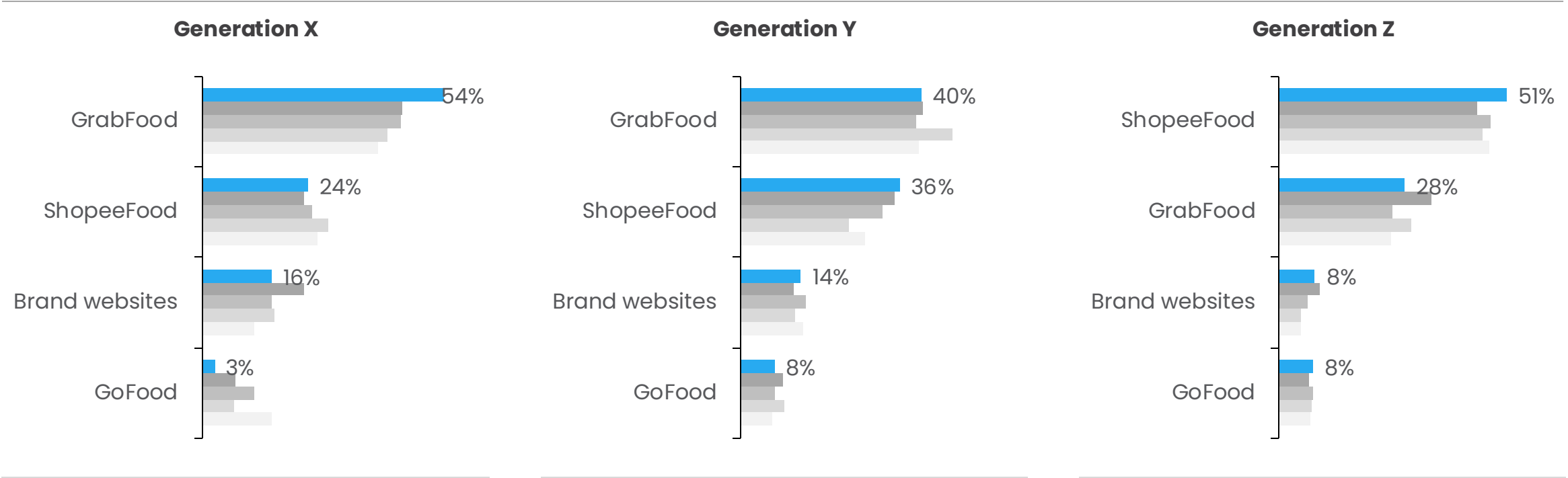
Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,251

Q Which food delivery app do you use most often?

**Within that, ShopeeFood has emerged as the favorite platform for Gen Z, while GrabFood retains its dominance among Gen X. This suggests a generational divide in food delivery preferences**

Top platforms for food delivery – Preference rate (%) by generations



Source: Decision Lab Connected Consumer Survey Q2 2024

n=278

n=535

n=438

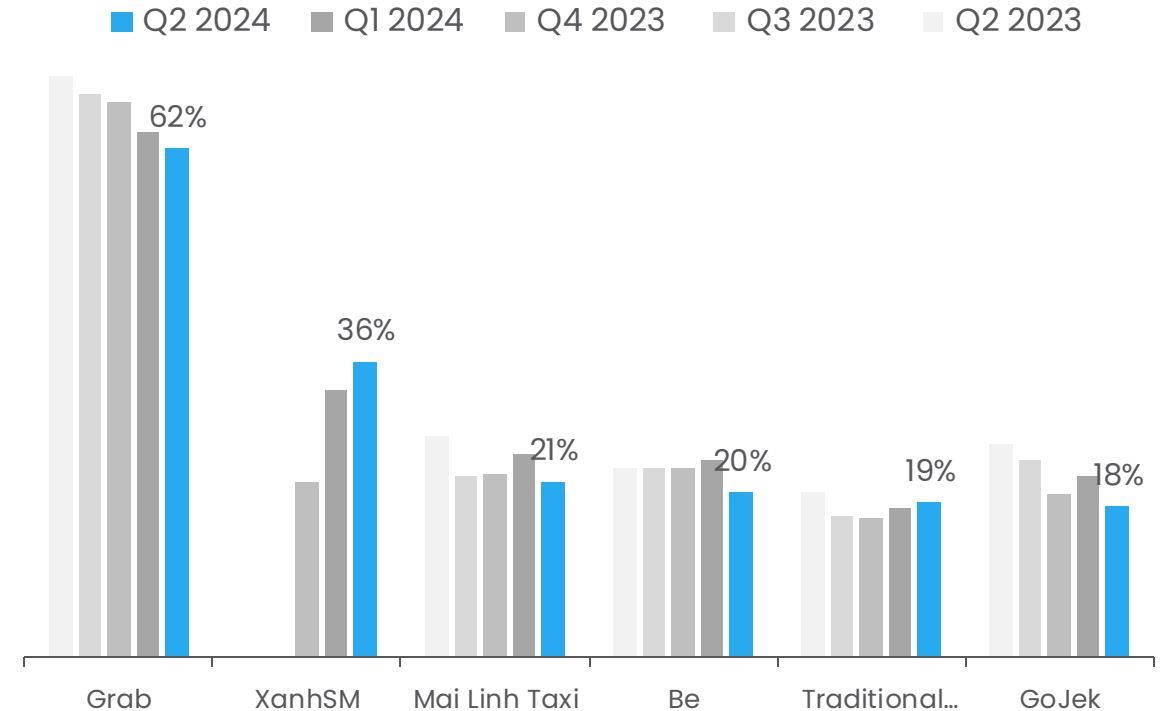
Q Which food delivery app do you use most often?

■ Q2 2024 ■ Q1 2024 ■ Q4 2023 ■ Q3 2023 ■ Q2 2023

## Ride-hailing platforms

The ride-hailing landscape is evolving, with XanhSM expanding its user base while established players like Grab, Be, and Gojek have experienced declining rates

### Top platforms for ride-hailing—Penetration rate (%)



Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,478

q Which apps or methods do you use for ride-hailing? Choose all that apply.

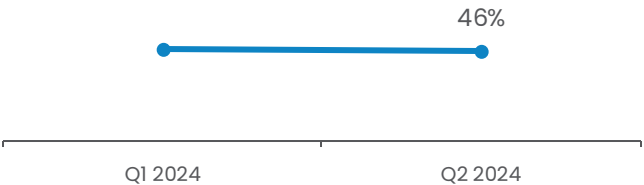
# Despite maintaining its position on the leaderboard for preferred car-hailing services, Taxi Mai Linh has seen a slight decline in user favorability this quarter

Top platforms for car ride-hailing – Preference rate (%)

GrabCar

Q2 2024

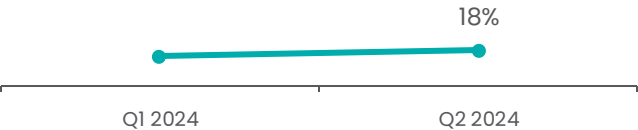
46% (-2%)



XanhSM Taxi

Q2 2024

18% (+3%)



Taxi Mai Linh

Q2 2024

9% (-2%)



Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,378

Q Which ride-hailing app or method do you use most often when ordering a car ride?



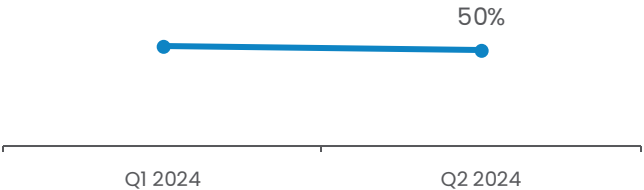
# The leading platform for bike-hailing services has maintained its position this quarter, with user preferences remaining largely unchanged

Top platforms for motorbike ride-hailing – Preference rate (%)

GrabBike

Q2 2024

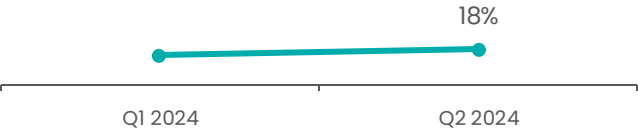
50% (-2%)



XanhSM Bike

Q2 2024

18% (+2%)



Traditional motorbike taxi

Q2 2024

12% (+2%)



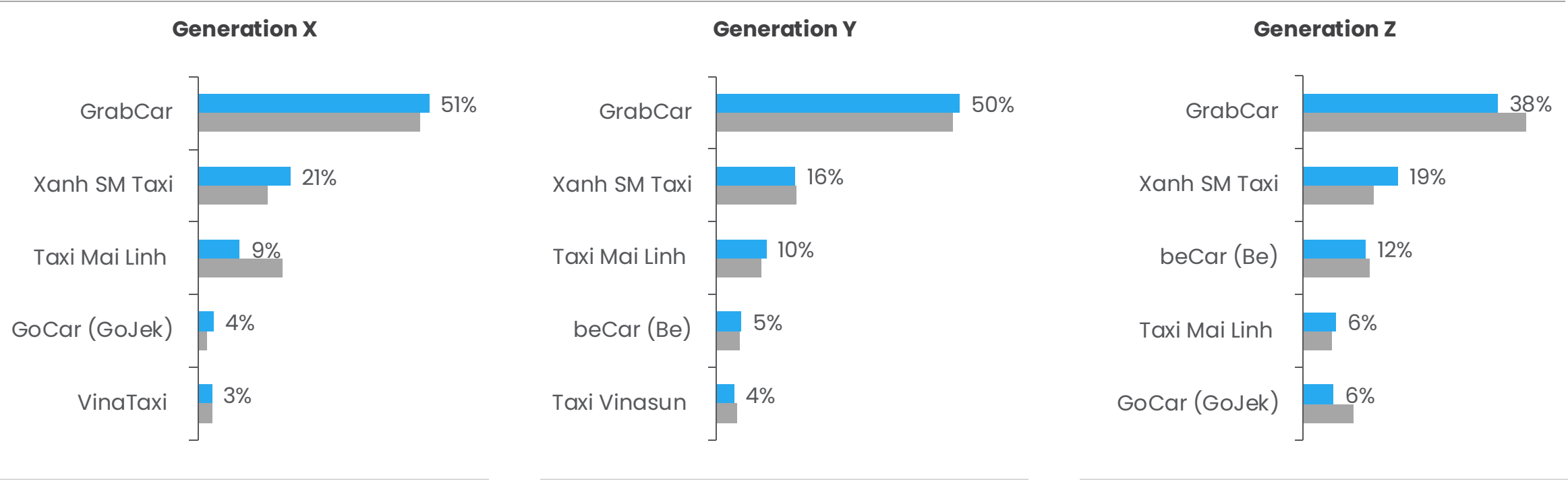
Source: Decision Lab Connected Consumer Survey Q2 2024

n=1,356

Q Which ride-hailing app or method do you use most often when ordering a motorbike ride?

**The top 3 car-hailing preferences for older generations remain unchanged this quarter. Interestingly, despite a decline in overall usage, beCar has retained its position as the third most preferred choice among Gen Z users**

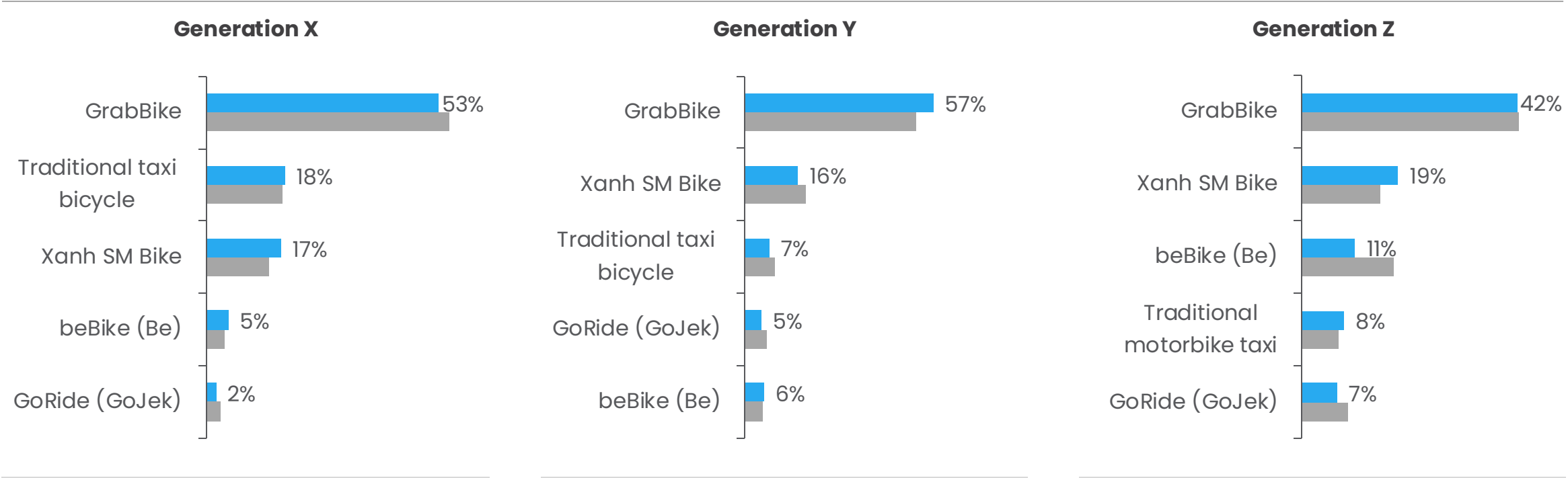
Top platforms for car ride-hailing – Preference rate (%) by generations



Source: Decision Lab Connected Consumer Survey Q2 2024      n=337      n=566      n=475

Similarly, the top three bike-hailing platforms have remained consistent for older groups, while beBike is still the third most preferred choice among Gen Z. This suggests a potential preference for specific features offered by Be that resonate with this demographic

Top platforms for motorbike ride-hailing – Preference rate (%) by generations



Source: Decision Lab Connected Consumer Survey Q2 2024

n=335

n=554

n=467

Q Which ride-hailing app or method do you use most often when ordering a motorbike ride?

■ Q2 2024 ■ Q1 2024

# Summary

## Key takeaways

- Despite stability in the utilities sector, each category shows subtle movement in platform penetration and preference, highlighting the dynamic nature of consumer behaviors. This underscores the importance of continuously monitoring usage trends to ensure brands stay aligned with consumers' needs



## Implications

- **Conduct constant tracking surveys of brand health and consumer behaviors**
  - Regular brand health monitoring helps brands stay informed about the competitive landscape. By consistently gathering data, brands can identify shifts in market dynamics and respond proactively
  - Consumer surveys allow brands to stay attuned to continually changing consumer preferences and trends. By understanding these shifts, brands can adapt their strategies to meet evolving consumer needs, ensuring they remain relevant and competitive

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and growing

**10 sectors**

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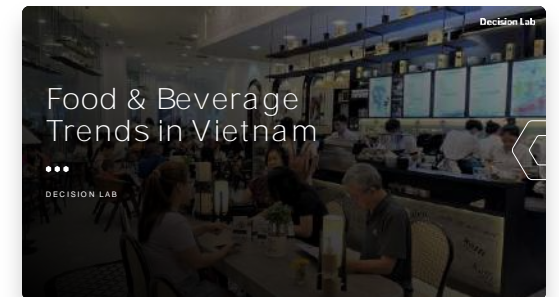
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