



Digital Vietnam 2010

Yahoo!-TNS Net Index Highlights
Ho Chi Minh City, Vietnam

YAHOO!

KANTAR MEDIA

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Yahoo!-TNS Net Index 2010

- At Yahoo! and TNS, we believe in the power of deep, fact-based insights that drive bigger ideas and better results for our clients
- In 2009, Yahoo!-TNS Net Index initiative was launched to gather a baseline understanding of Vietnamese internet users across four major cities
 - Single-source cross-media view i.e. beyond internet media
 - ‘Big picture’ overview covering media habits, lifestyles, psychographics to brand preferences
- 2010 wave aims to gain deeper insights into areas of current, topical interest
 - Expanded coverage with increased sample sizes
 - Expanded scope to track shifts in consumer behaviour



Research Design

Methodology	Personal face-to-face interviews using two-part structured questionnaires (linked with TNS Media Habits Survey)
Area Coverage	Ho Chi Minh City, Hanoi, Da Nang, Can Tho
Respondents	Males and Females aged 15+ years old across all socio-economic classes who have used the internet in the past month
Sample Size	1,507
Sampling Approach	Multi-stage Probability Sampling
Fieldwork Period	December 2009



Study Scope

	2009	2010
Internet User Profile	x	x
Internet Access & Activities	x	x
Web Motivations	x	Expanded
Internet Portals	x	x
Search Engines	x	x
Web-based E-mail	x	x
Instant Messengers	x	x
Social Networking	x	x
Community Groups/Forums	x	Expanded
Blogging		x
User Generated Content		x



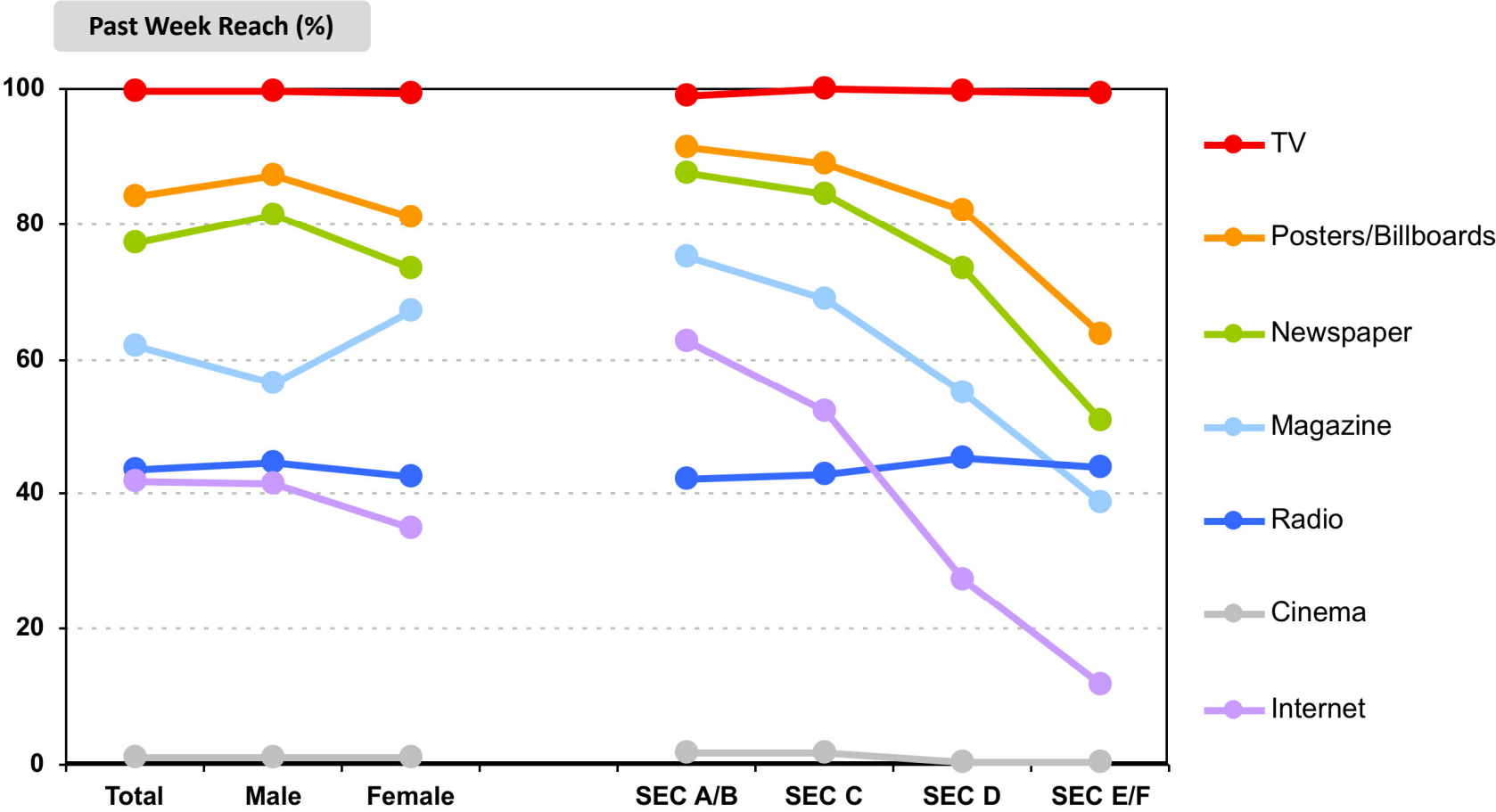
Study Scope

	2009	2010
Mobile Internet	x	Expanded
Online Transactions		x
Online Gaming		x
Online News		x
Cross Media Usage (i.e. TV, Print And Radio)	x	x
Product Consumption & Brand Preferences	x	x
User Psychographics & Attitudes	x	Expanded



2008-2009: Recap

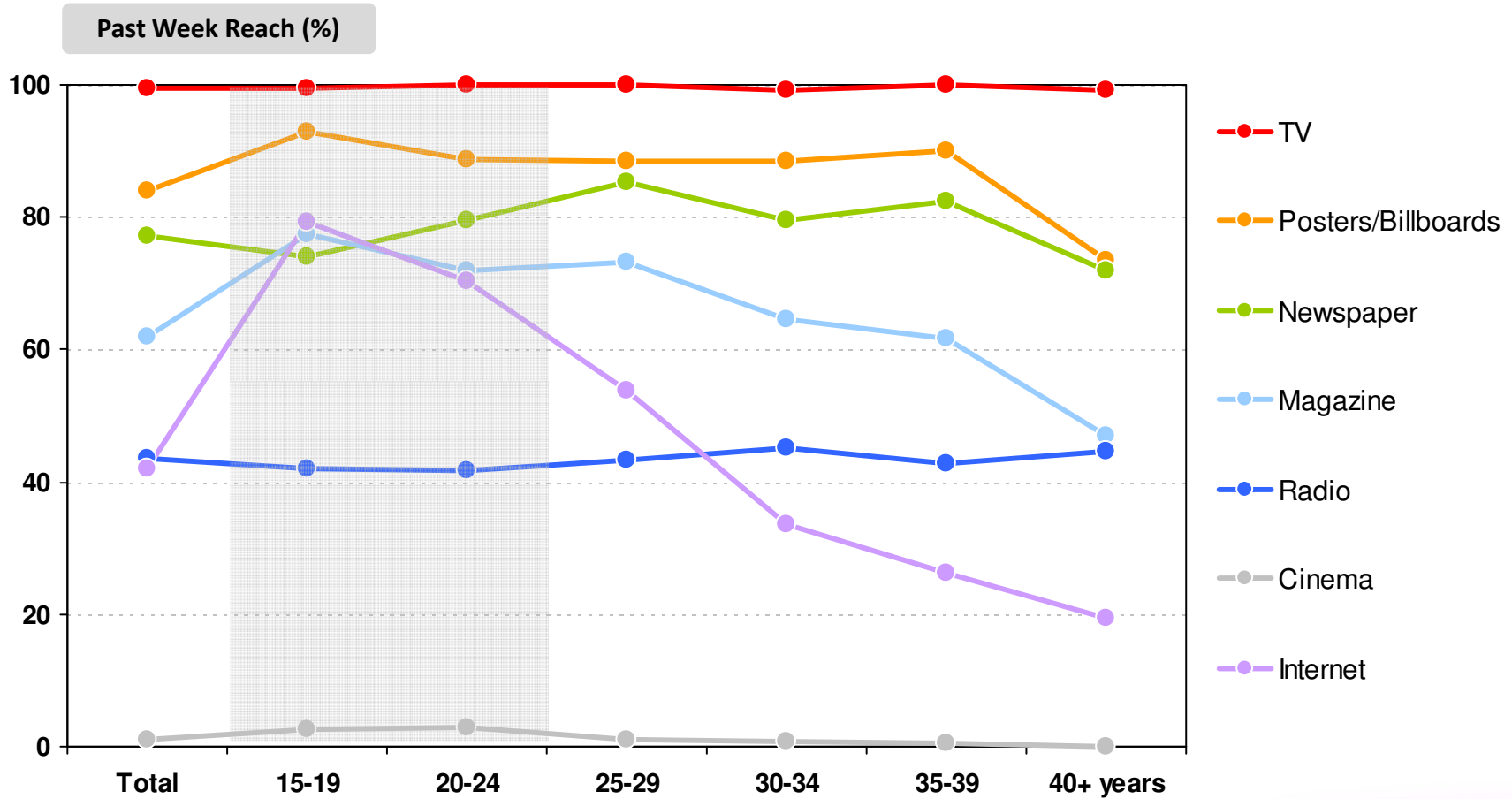
Internet - strong affinity with the upscale...



Base: Males and Females aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
 Source: TNS Media Habits Survey 2008 Wave 2



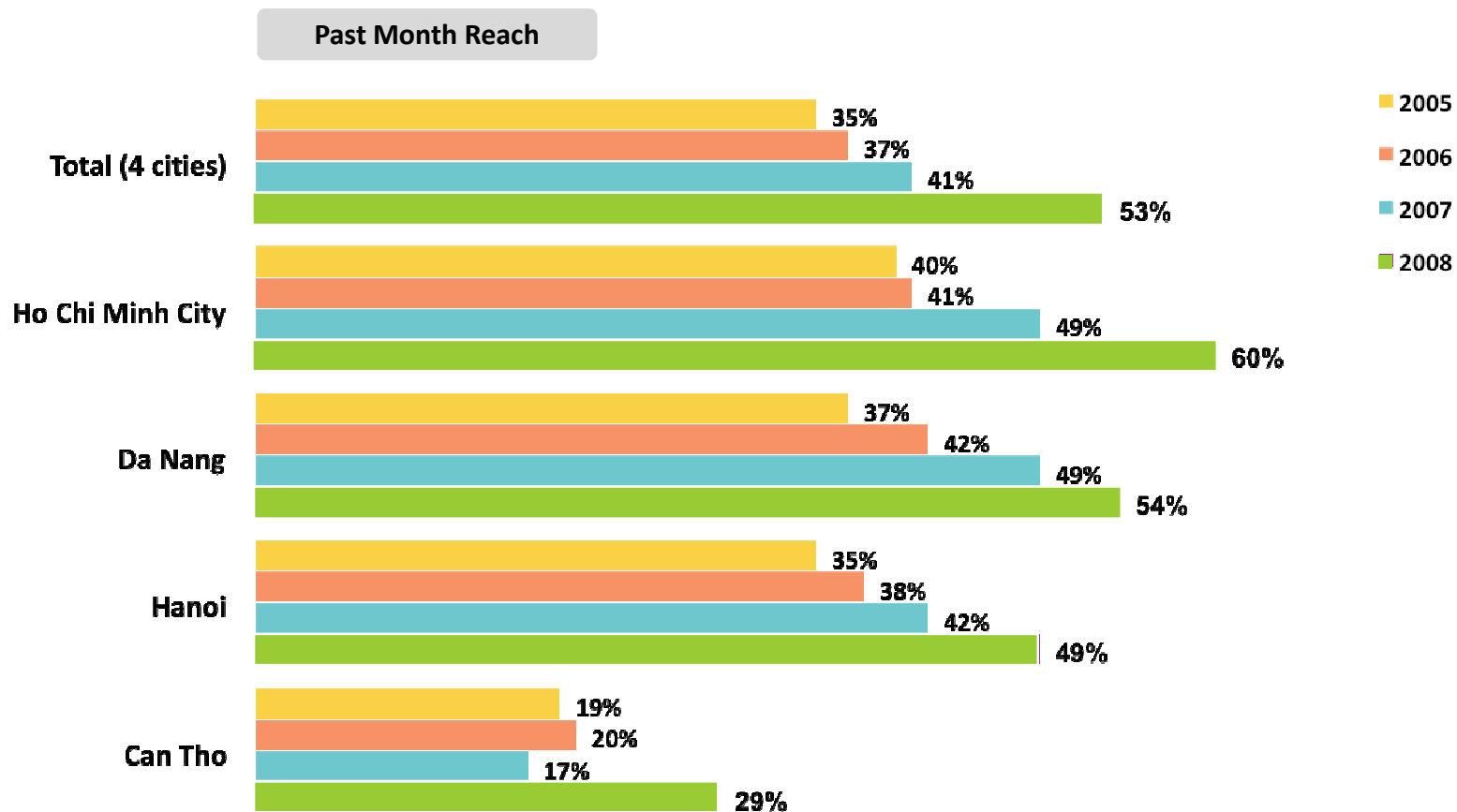
... and the Vietnamese youth



Base: Males and Females aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
 Source: TNS Media Habits Survey 2008 Wave 2



Not just a Ho Chi Minh City phenomenon...

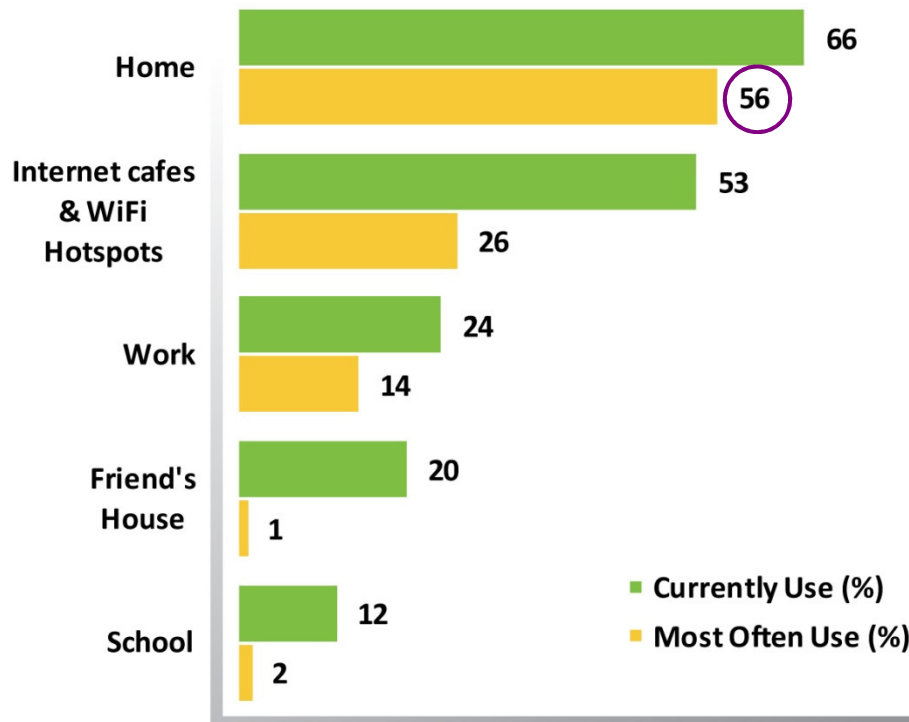


Base: Males and Females aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: TNS Media Habits Survey (2005-2008)

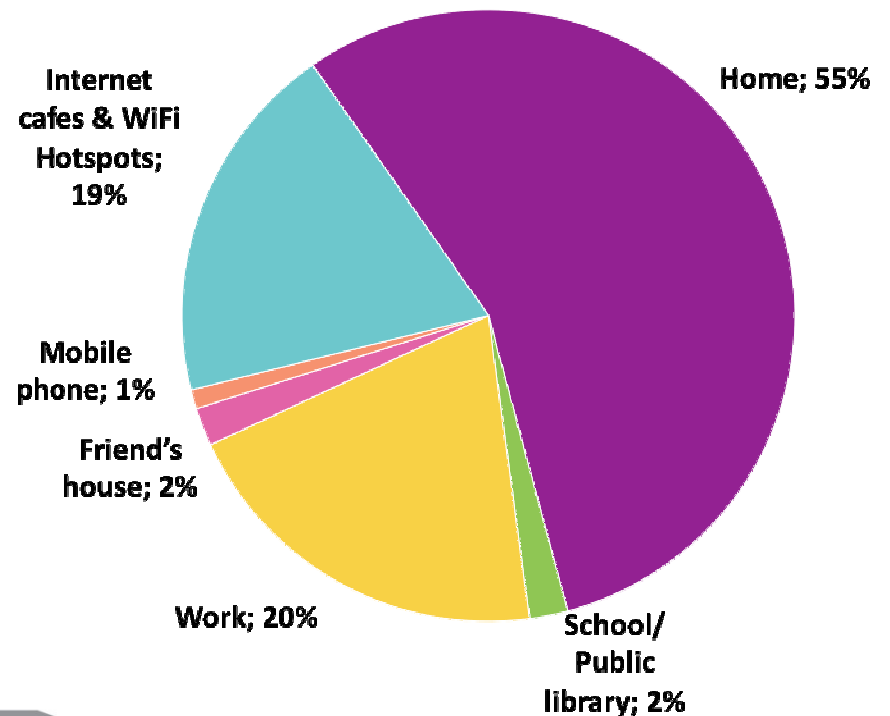


Home internet surpassed internet café access

Place of Access - Past 3 Months (%)



Share of Internet Hours

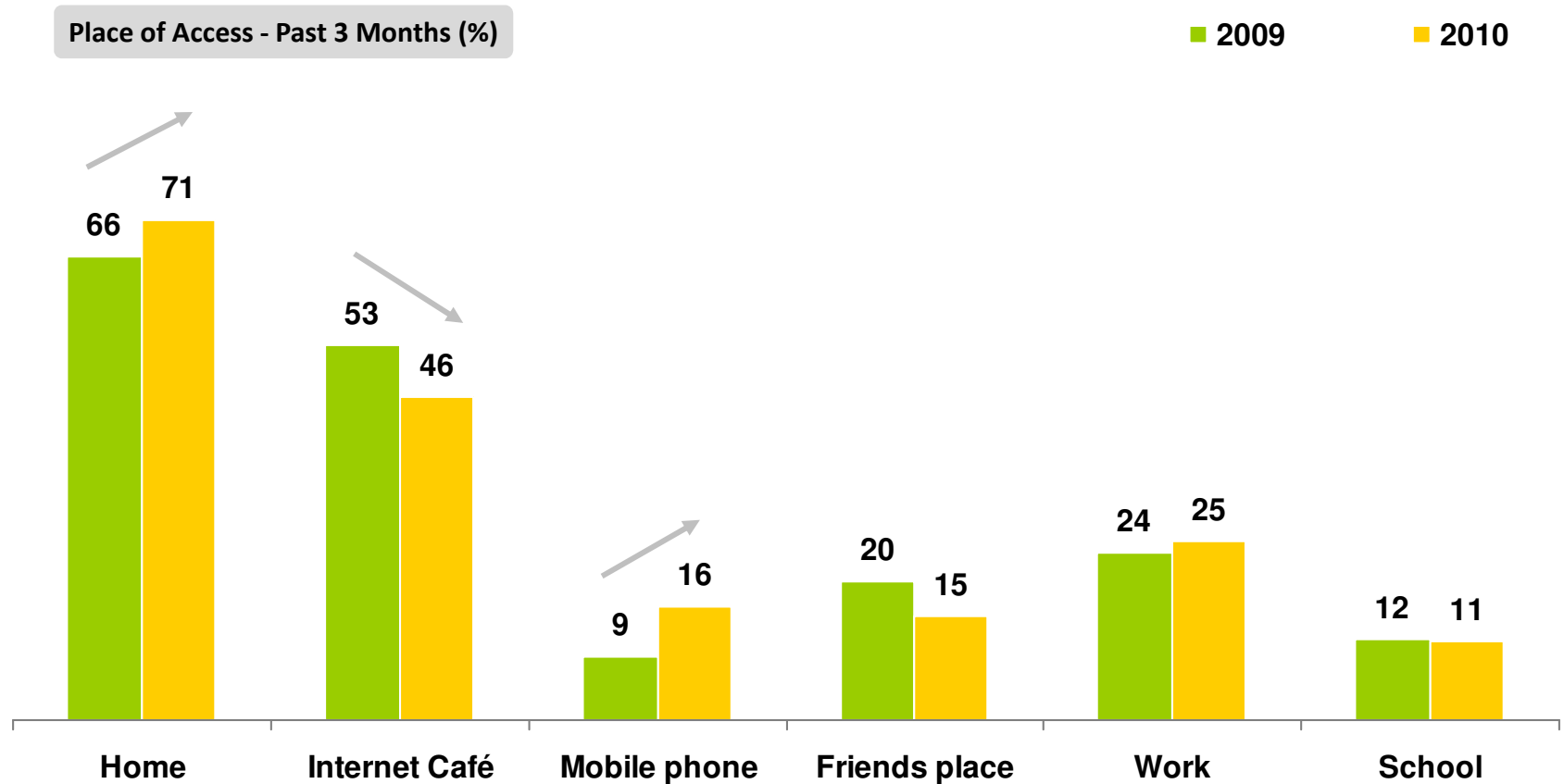


Base: Past month internet users aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
 Source: Yahoo!-TNS Net Index 2009



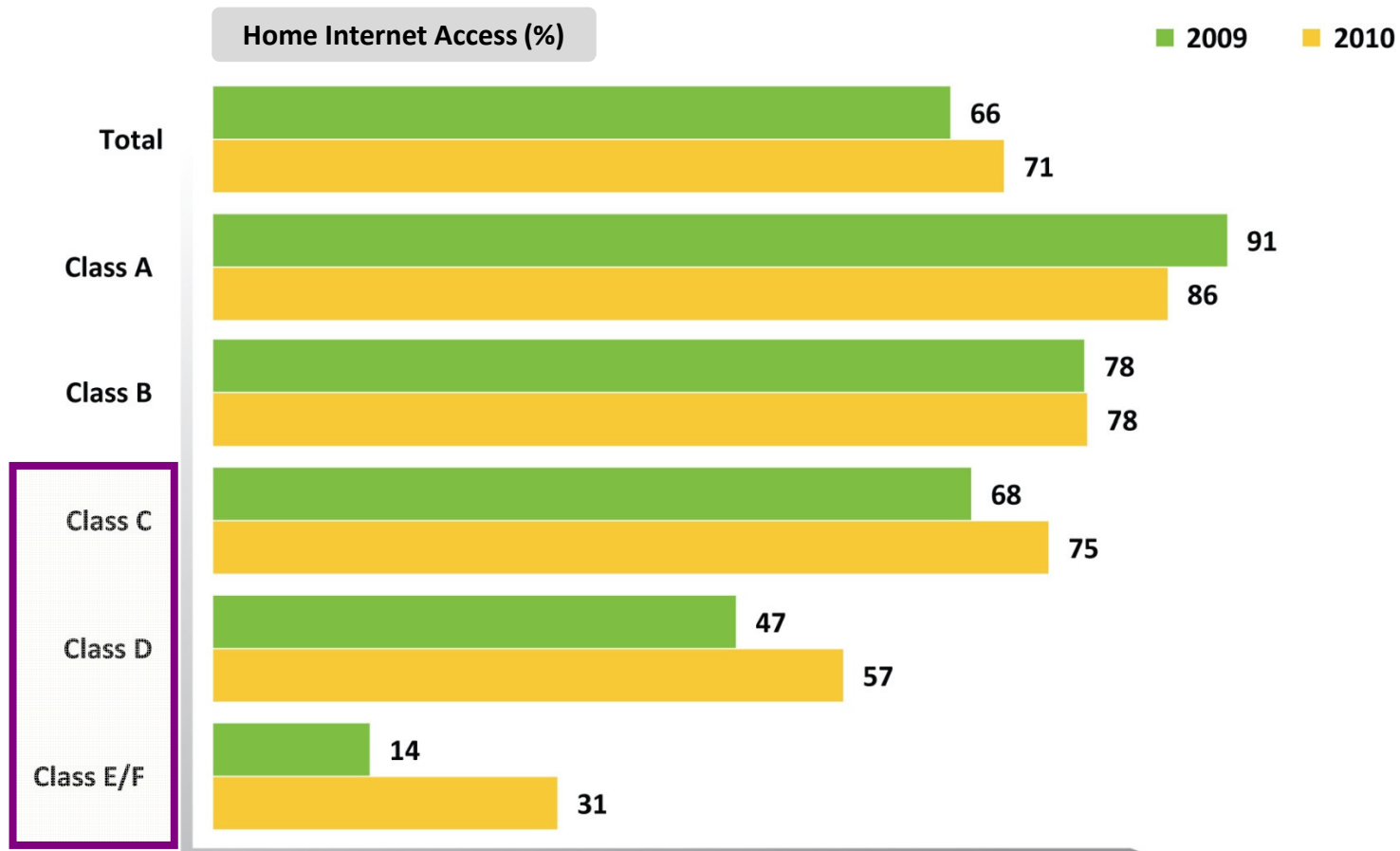
2009-2010: Shifts and Trends

From shared to private access...



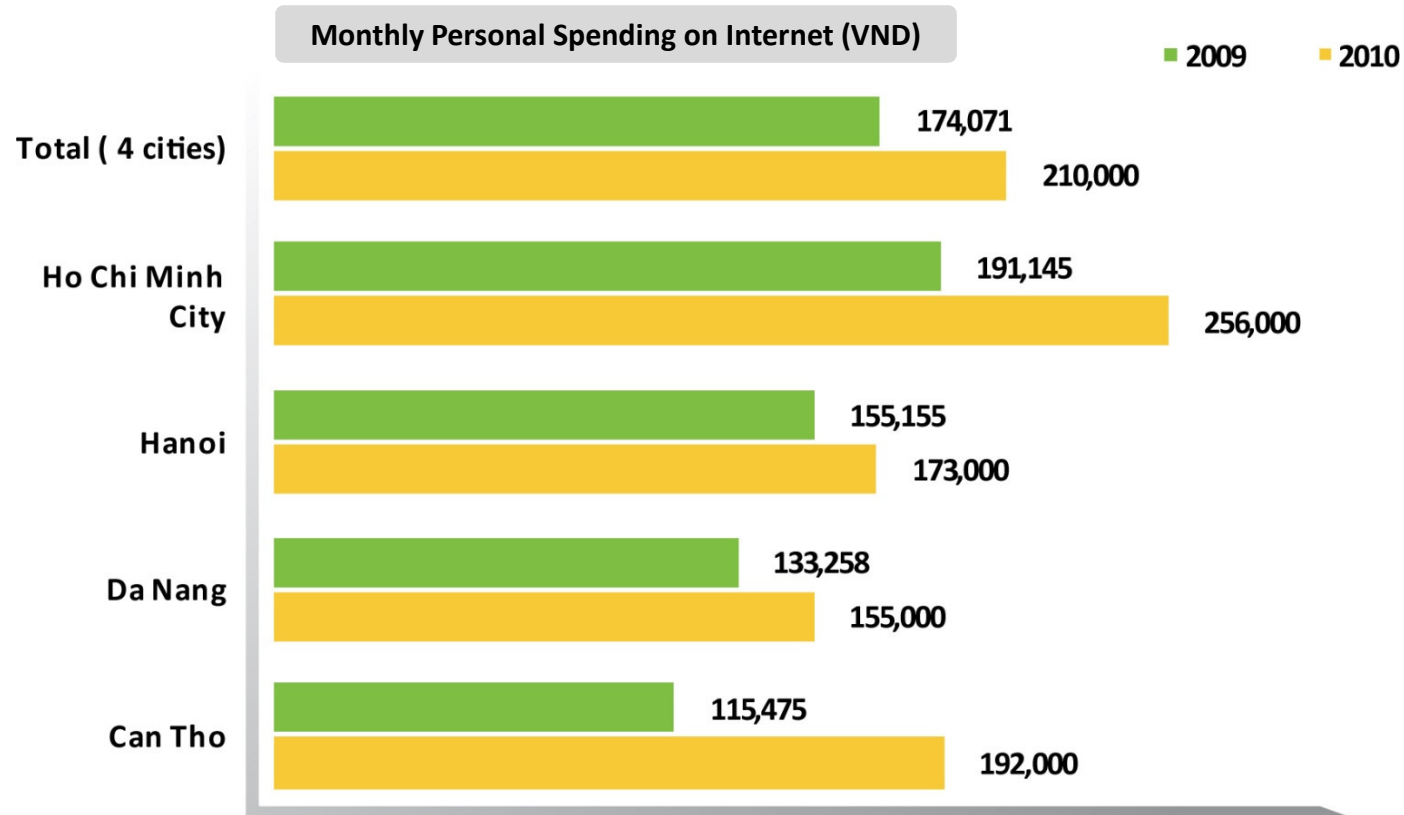
Base: Males and Females aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: TNS Media Habits Survey 2010

Increasingly driven by lower SECs...












Base: Past month internet users aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: Yahoo!-TNS Net Index 2010

Users are spending more on internet access (average increase of 20% in expenditure)



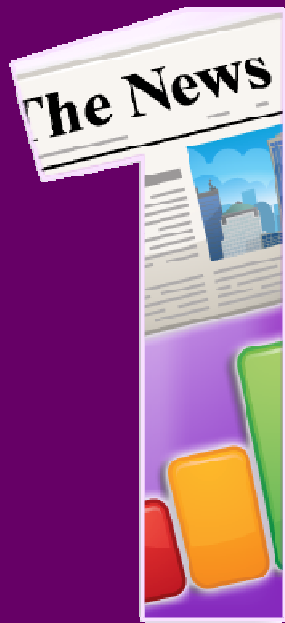
Base: Past month internet users aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: Yahoo!-TNS Net Index 2010

Key internet activities remain unchanged but preferences may be evolving...

Select Monthly Online Activities (%)	2009	2010*
Reading news online	89	97 
Visited internet portal front pages	88	96 
Used search engines	82	94 
Used instant messengers	73	73
Downloaded or uploaded music files online	67	58 
Used email	58	51 
Played games online	46	48
Watched TV programmes or videos clips online	43	48
Visited public chat rooms	27	40 
Remixed content sourced online	26	37 
Visited a social networking site	-	31
Purchased products online	4	11 
Paid to access or download digital content online	3	8 

* In 2009/10, there has been a re-classification of cities in Vietnam. Some rural districts have now being officially classified as urban (e.g. New Hanoi now includes Hatay). Comparisons between 2009 and 2010 are indicative only.

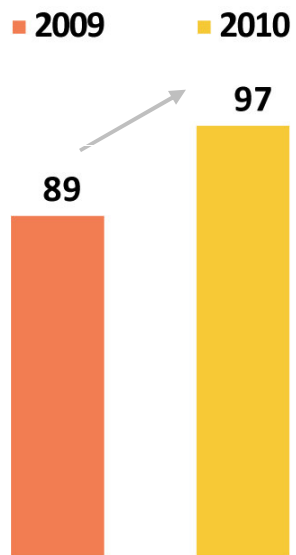
Base: Past month internet users aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: Yahoo!-TNS Net Index 2010



Online news remains Vietnam's top internet activity (and growing)

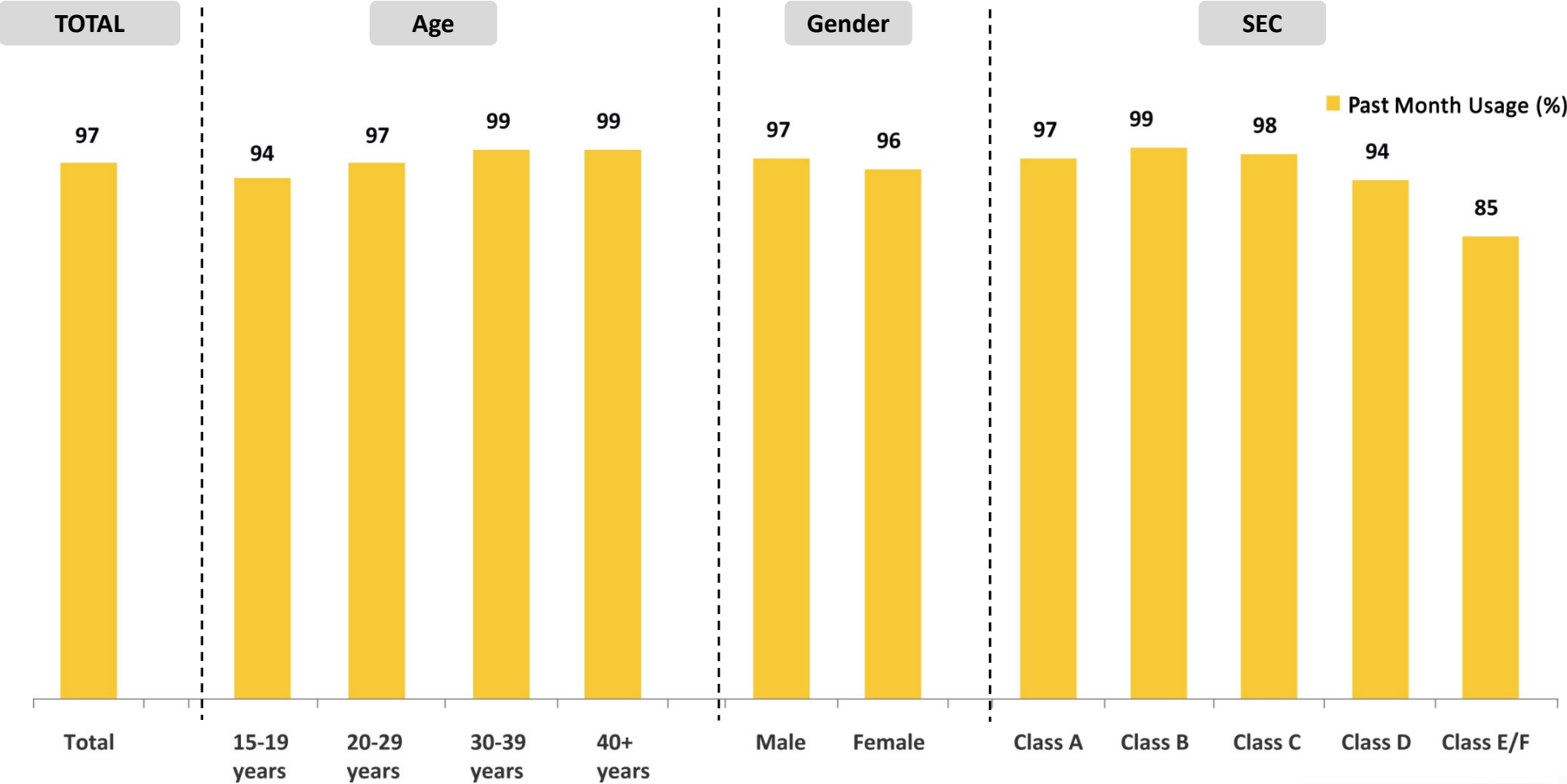
Vietnamese internet users are news hounds

Past Month Reach (%)



Base: Past month internet users aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: Yahoo!-TNS Net Index 2010

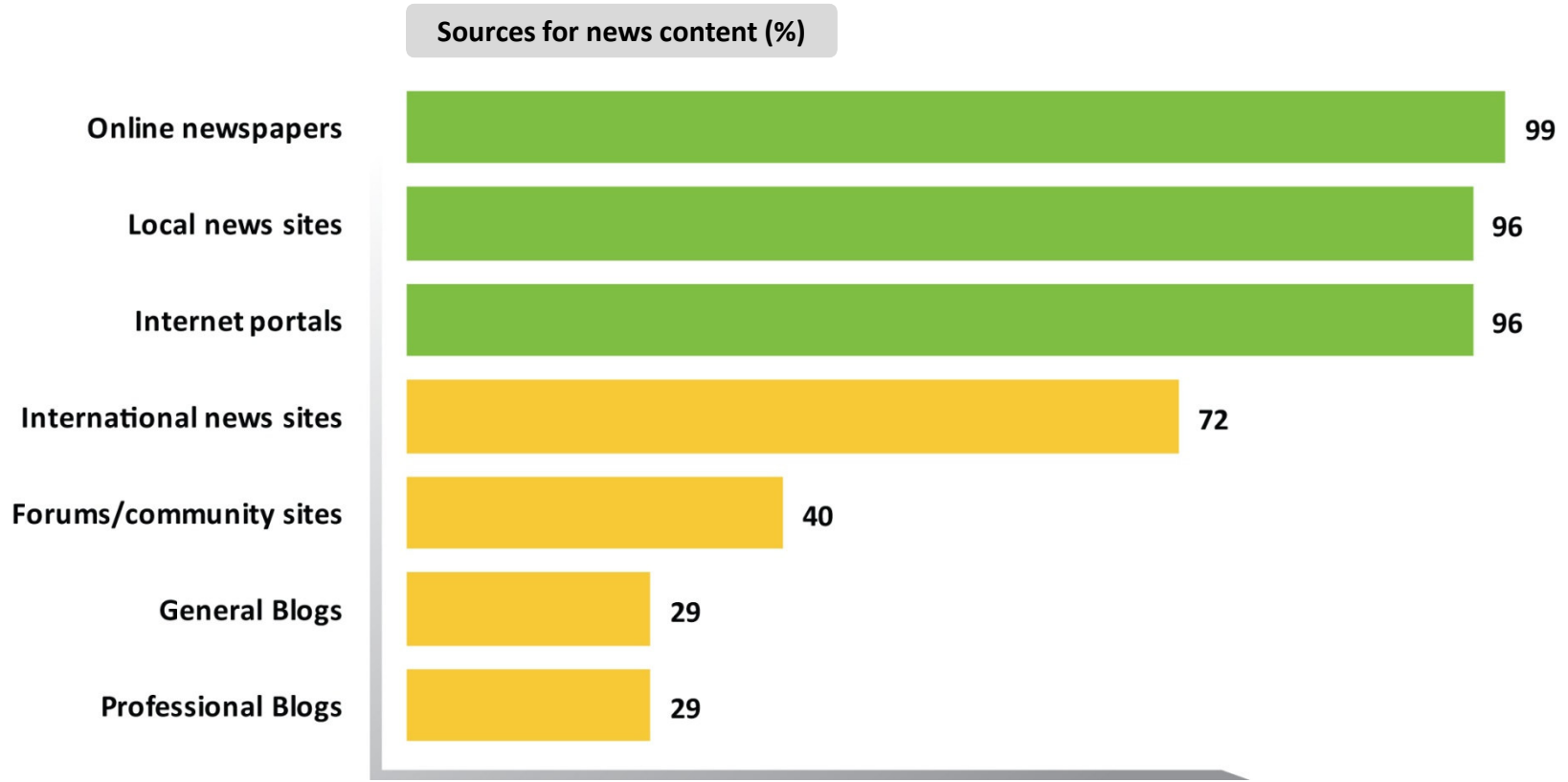
Online news reading is popular across classes – no demographic skew



Base: Past month internet users aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: Yahoo!-TNS Net Index 2010



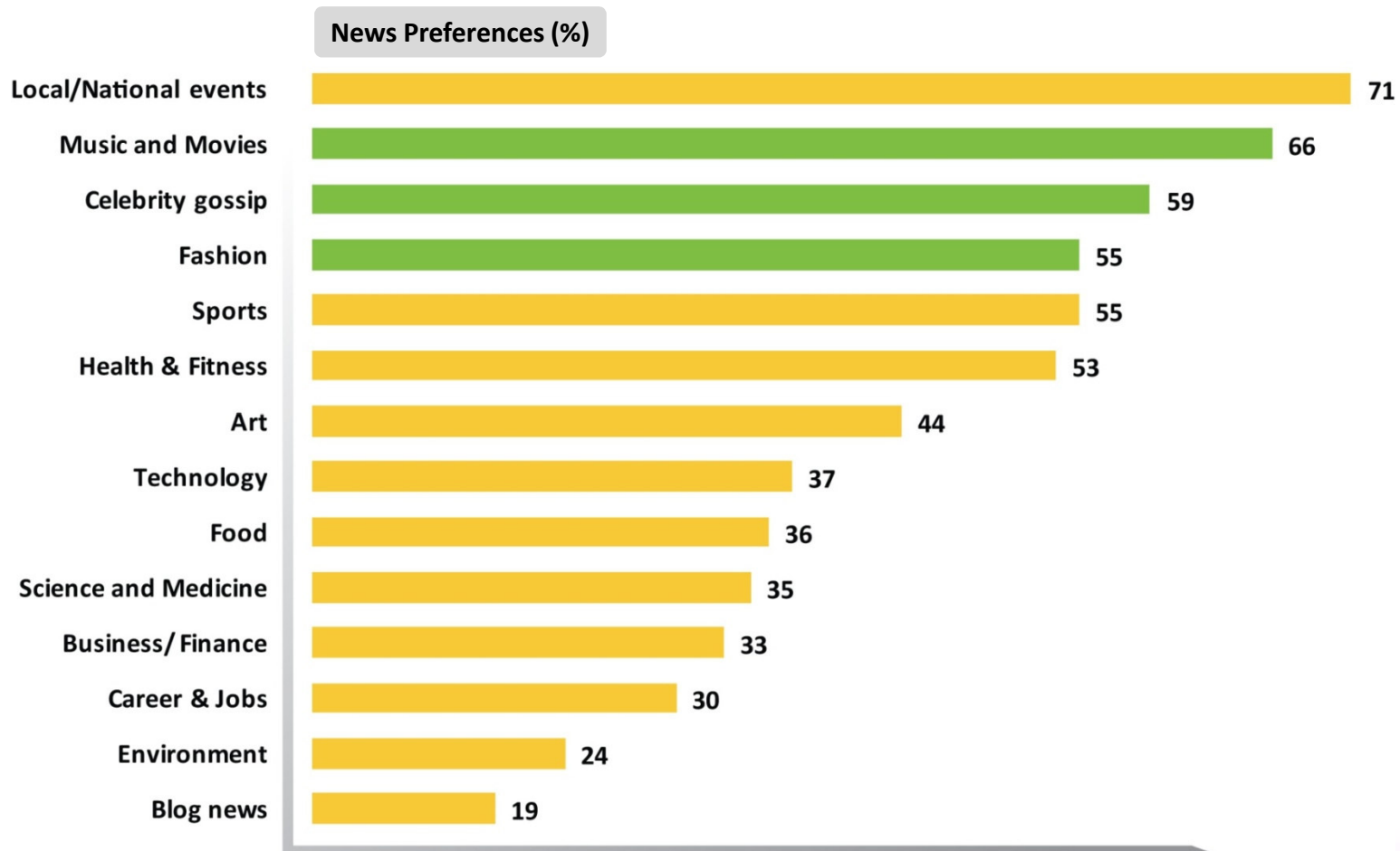
Online newspapers, local news sites and internet portals are key content sources



Base: Internet users aged 15+ across all 4 major cities who have read news online in the past month
Source: Yahoo!-TNS Net Index 2010



Clear preference towards entertainment-related news content...



Base: Internet users aged 15+ across all 4 major cities who have read news online in the past month
Source: Yahoo!-TNS Net Index 2010



... particularly amongst teens and females

	Index Scores*					
	Male	Female	15-19 years	20-29 years	30-39 years	40+ years
Local/National events/fairs	102	98	81	97	118	126
Music and Movies	90	112	120	104	82	72
Celebrity gossip	87	116	116	109	80	67
Fashion	71	134	110	107	95	60
Sports	139	53	87	101	107	113
Health & Fitness	85	118	76	103	115	121
Art	84	119	108	105	85	89
Technology	135	58	92	107	105	85
Food	60	147	92	109	97	93
Science and Medicine	123	72	86	107	96	115
Business/ Finance	99	101	38	110	147	125
Career & Jobs	104	95	71	121	100	94
Environment	95	106	79	99	100	152
Blog news	76	128	161	116	24	34

* An index score above 100 (or below 100) indicates a skew. Higher (lower) the score, larger (smaller) the skew.

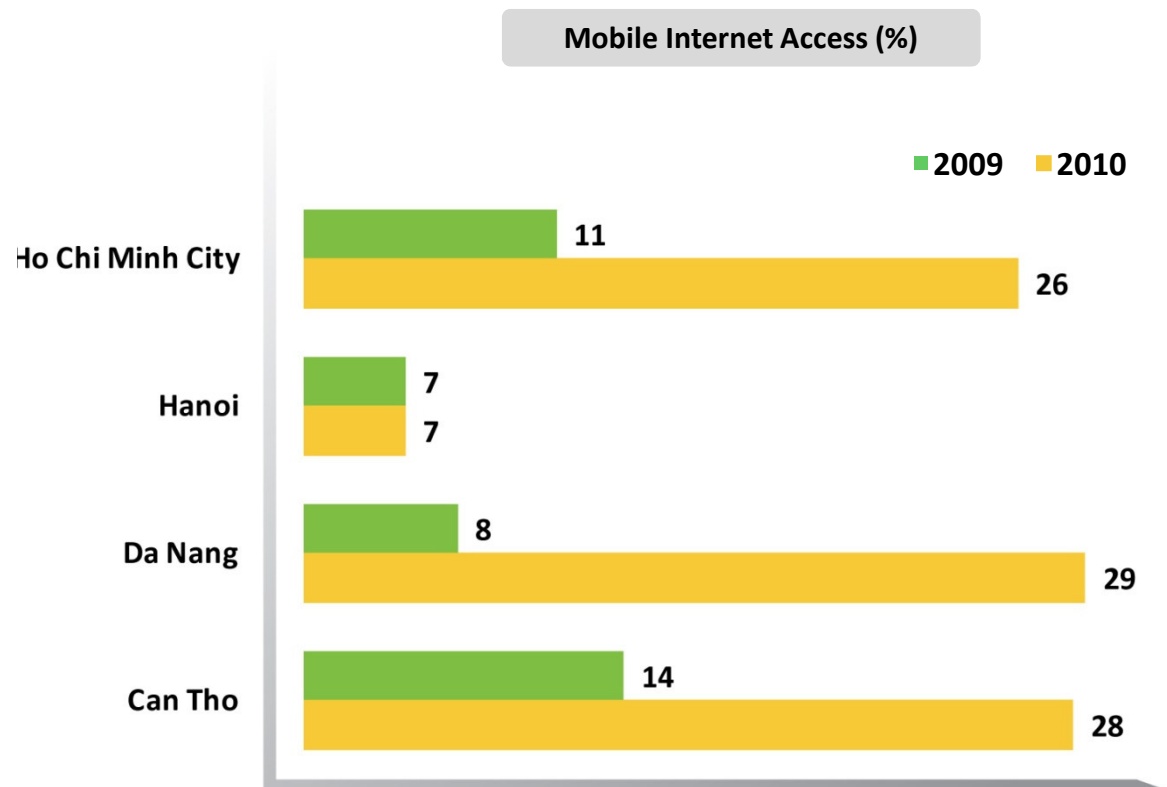
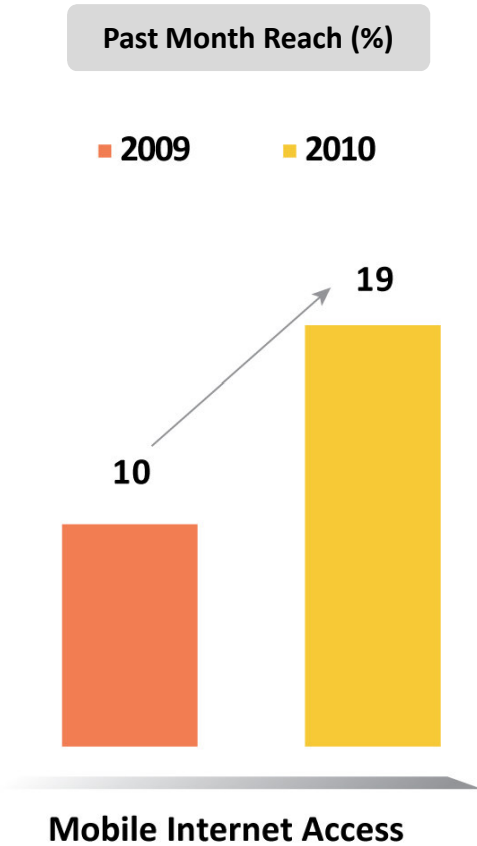
Base: Past month internet users aged 15+ across all 4 major cities who have read news online in the past month
Source: Yahoo!-TNS Net Index 2010





Watch the third-screen:
Mobile internet catching up fast

Attractive tariffs and 3G launch driving internet access through mobile phones

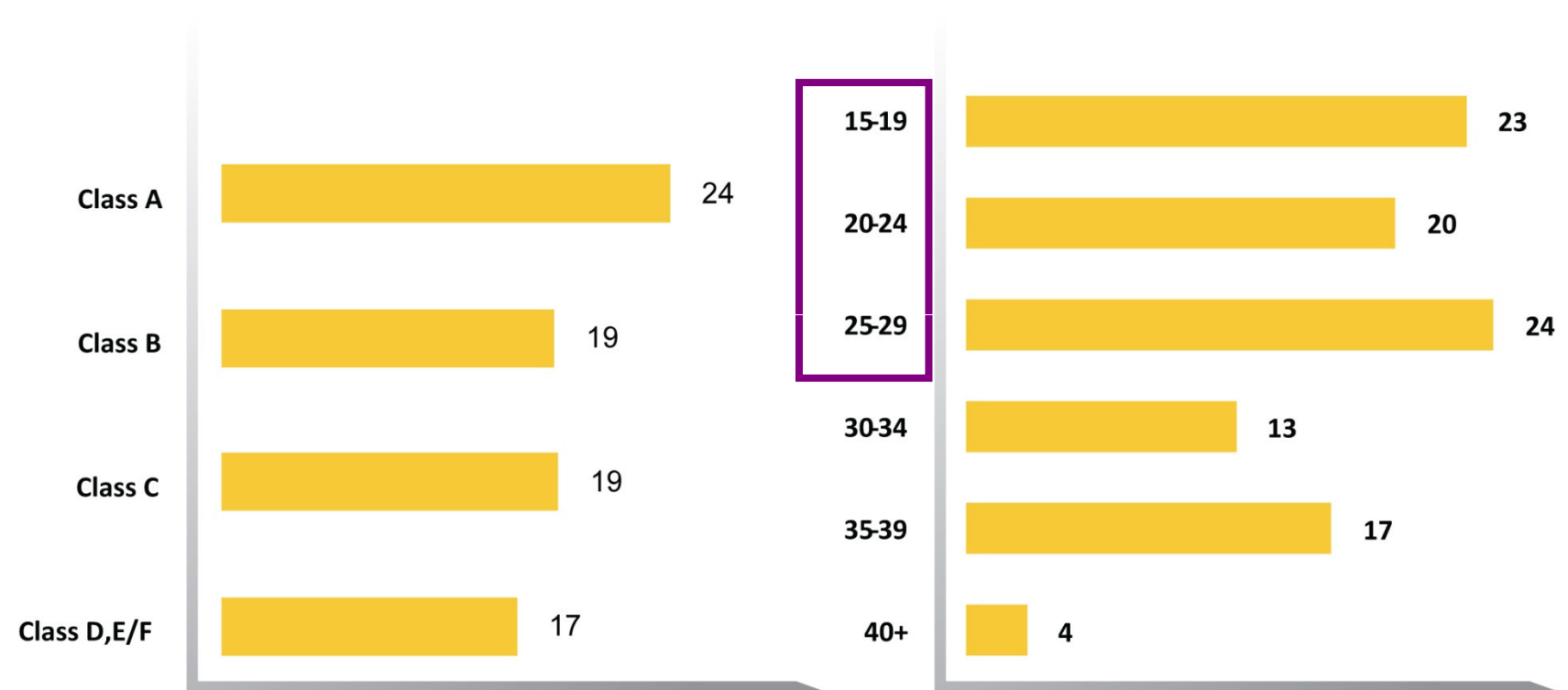


Base: Past month internet users aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: Yahoo!-TNS Net Index 2010



The youth are early adopters

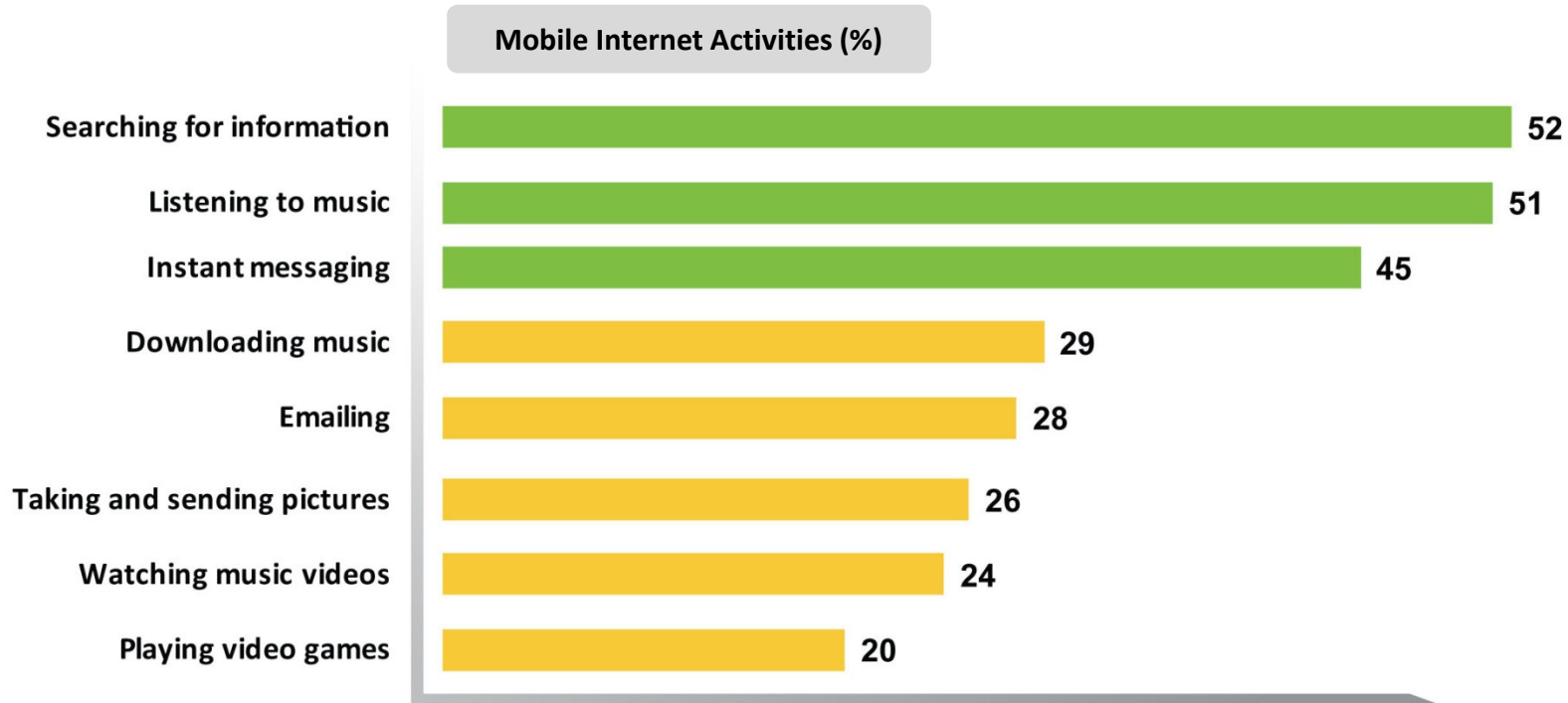
Mobile Internet Access (%)



Base: Past month internet users aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: Yahoo!-TNS Net Index 2010



Search and entertainment are key mobile internet drivers



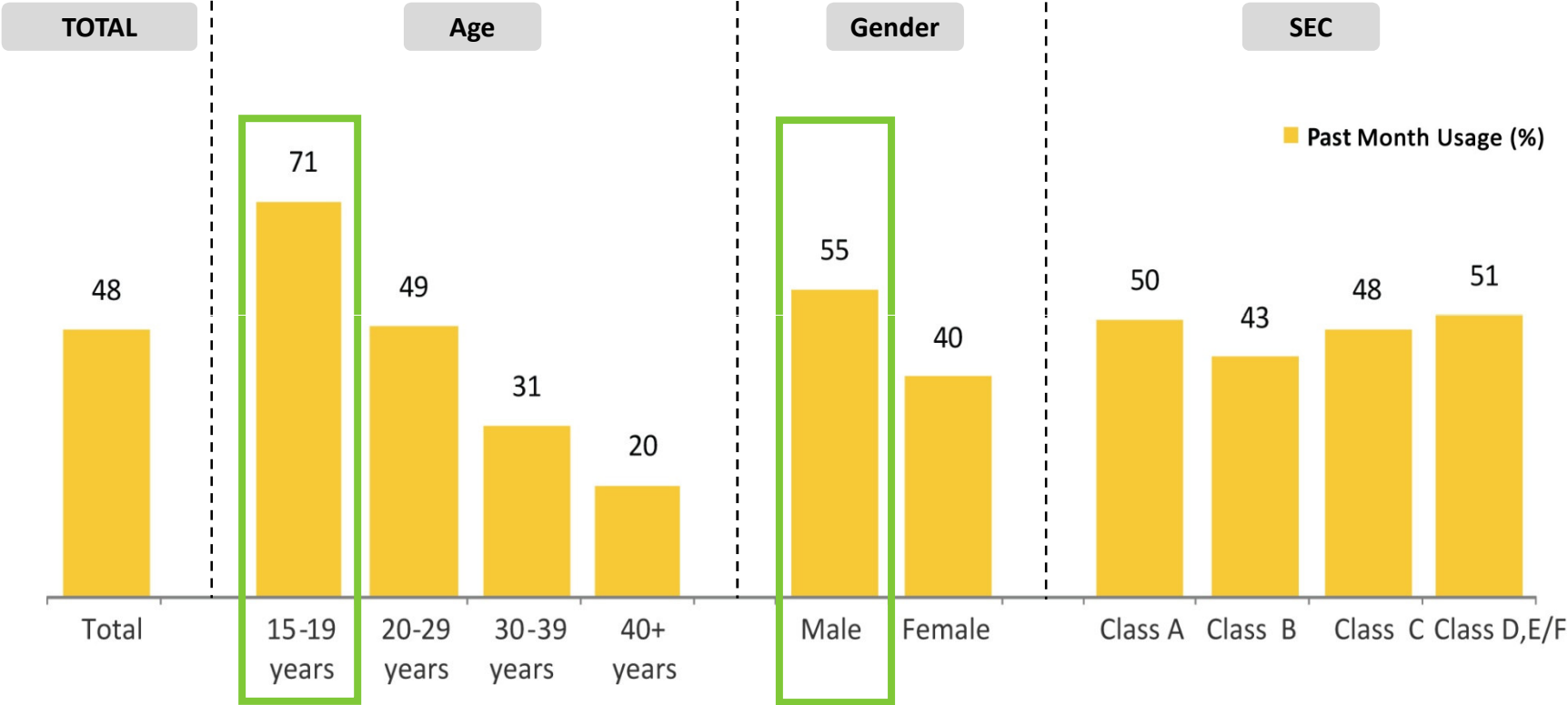
Base: Past month mobile internet users aged 15+ across all 4 major cities
Source: Yahoo!-TNS Net Index 2010





Online gaming is becoming
a dominant entertainment activity

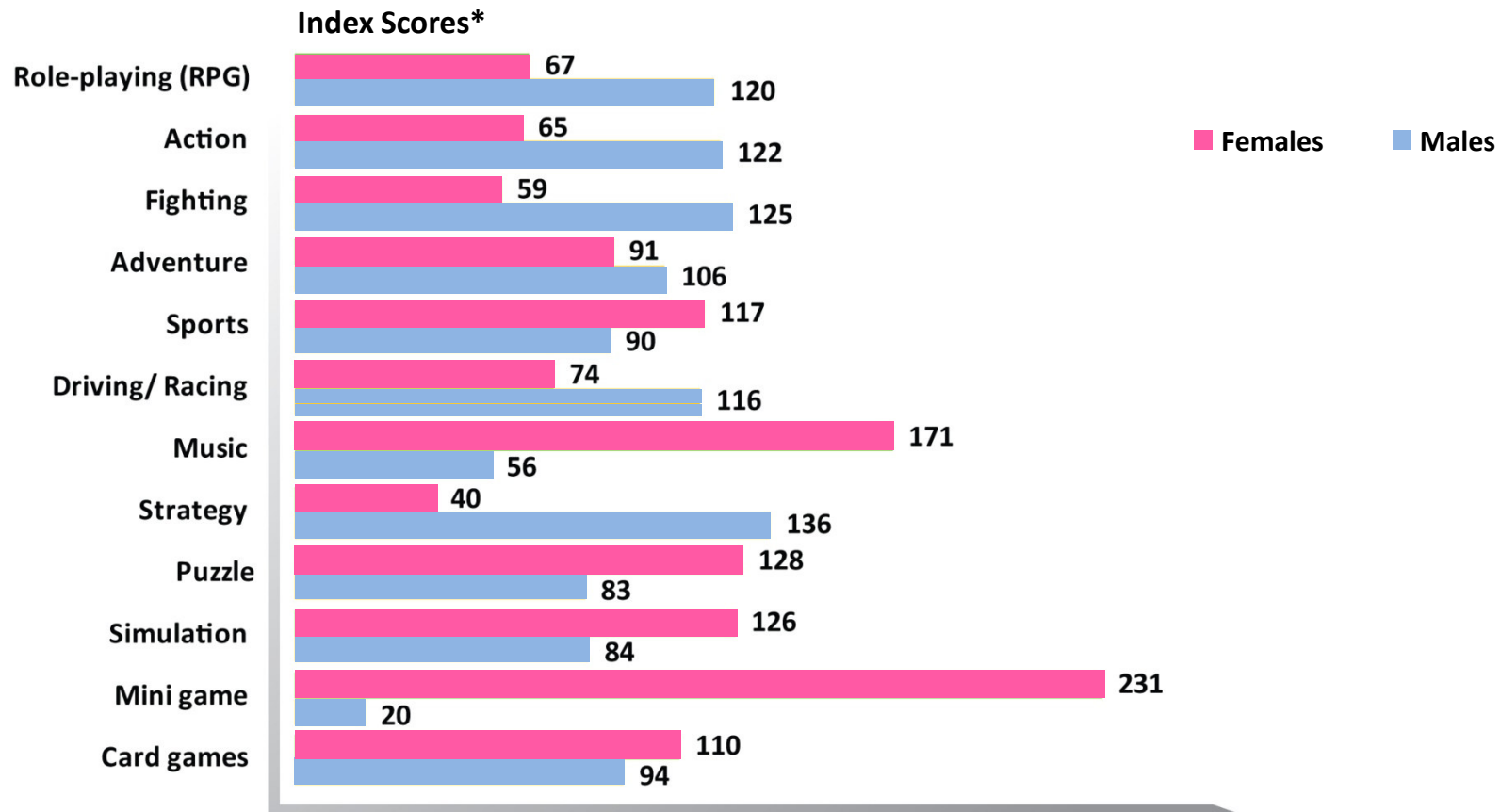
Young males are leading the online gaming movement...



Base: Past month internet users aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: Yahoo!-TNS Net Index 2010



Males prefer action-oriented games; Females are more inclined towards casual games



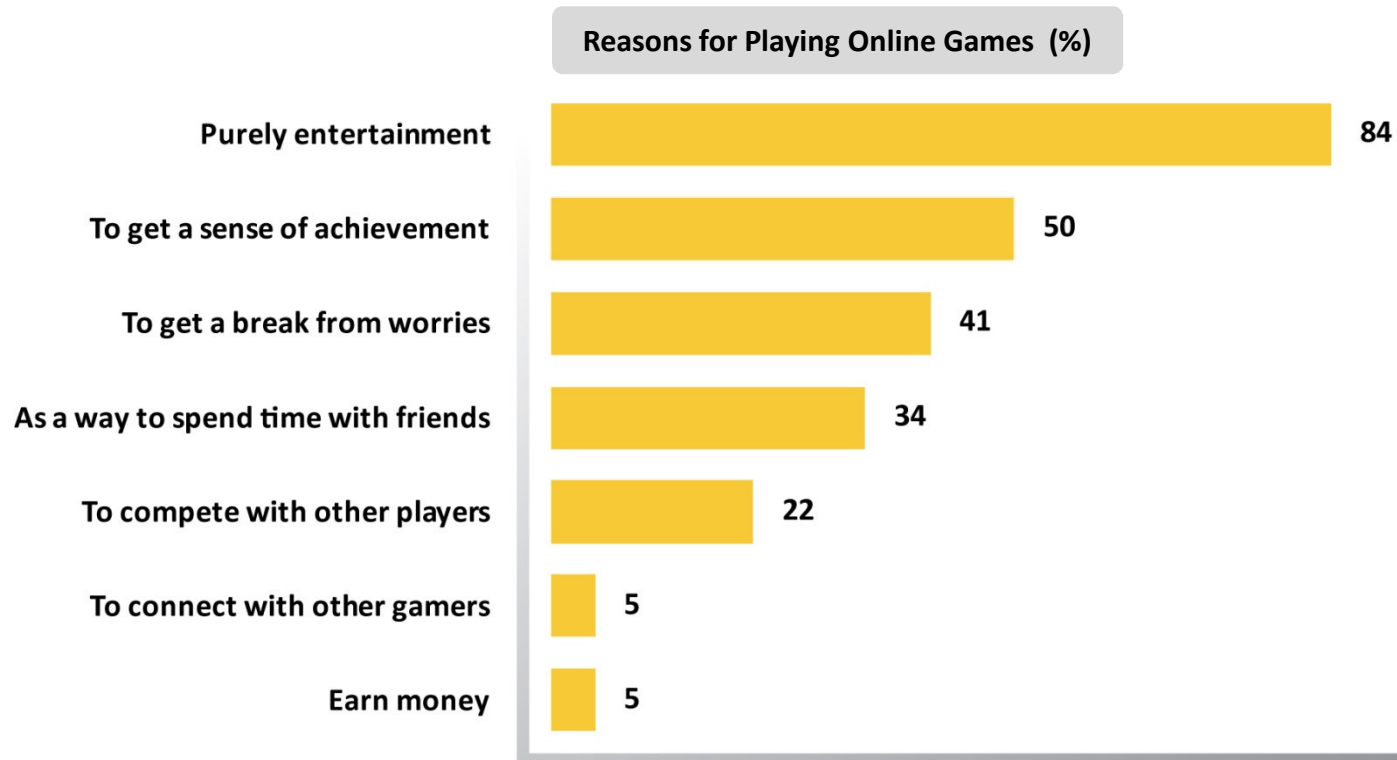
* An index score above 100 indicates a skew. Higher (lower) the score, larger (smaller) the skew.

Base: Internet users aged 15+ across all 4 major cities who have played games online in the past month

Source: Yahoo!-TNS Net Index 2010



Not just for entertainment value...



Base: Internet users aged 15+ across all 4 major cities who have played games online in the past month
Source: Yahoo!-TNS Net Index 2010

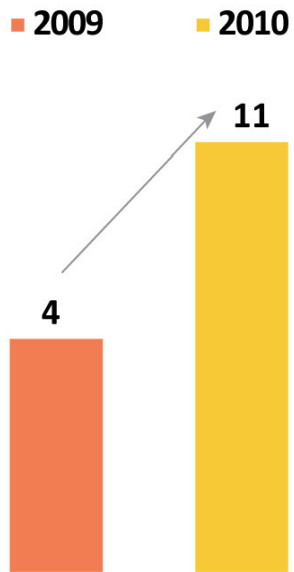




Online transactions is
an emerging trend

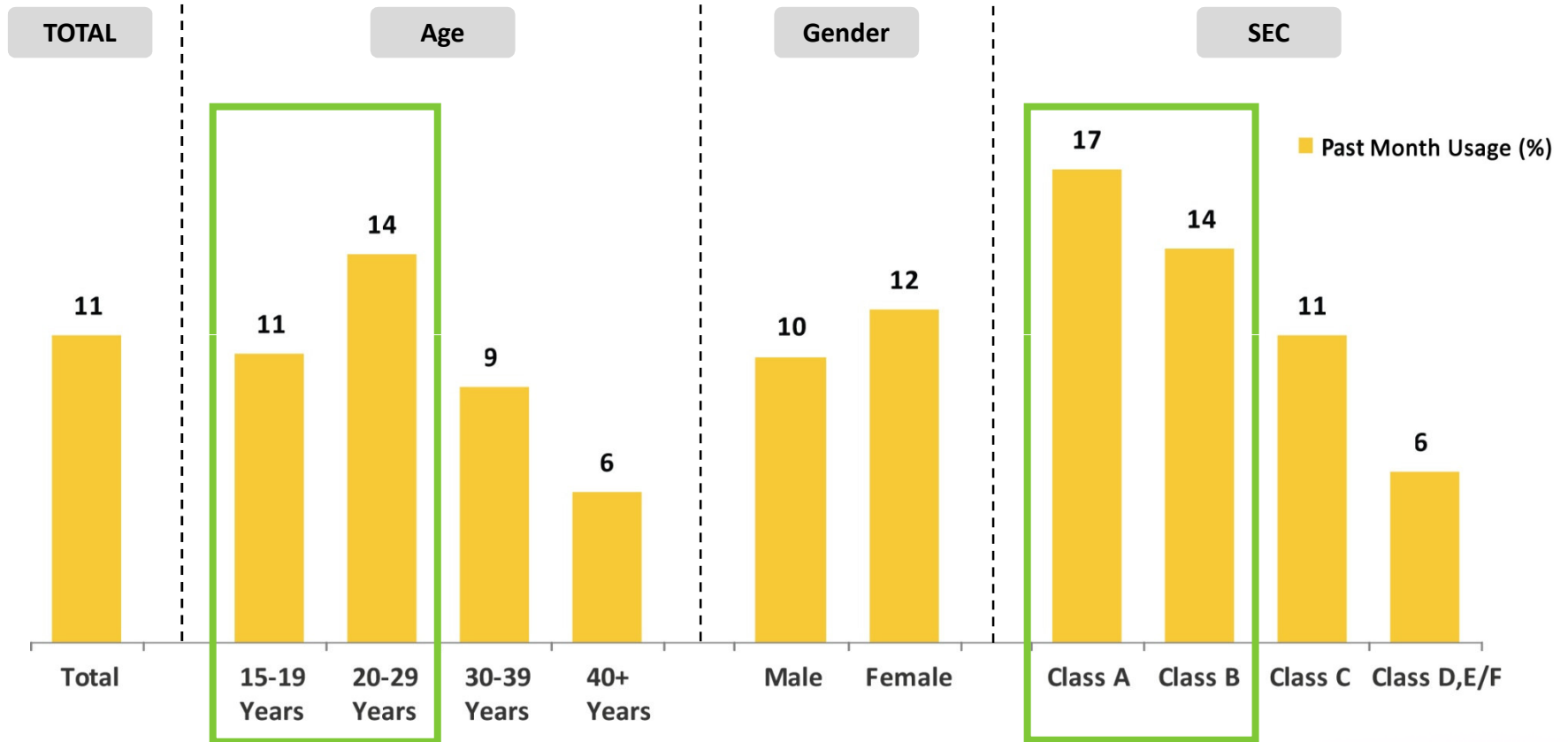
Online transactions are showing a notable surge

Past Month Usage (%)



Base: Past month internet users aged 15+ across all major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: Yahoo!-TNS Net Index 2010

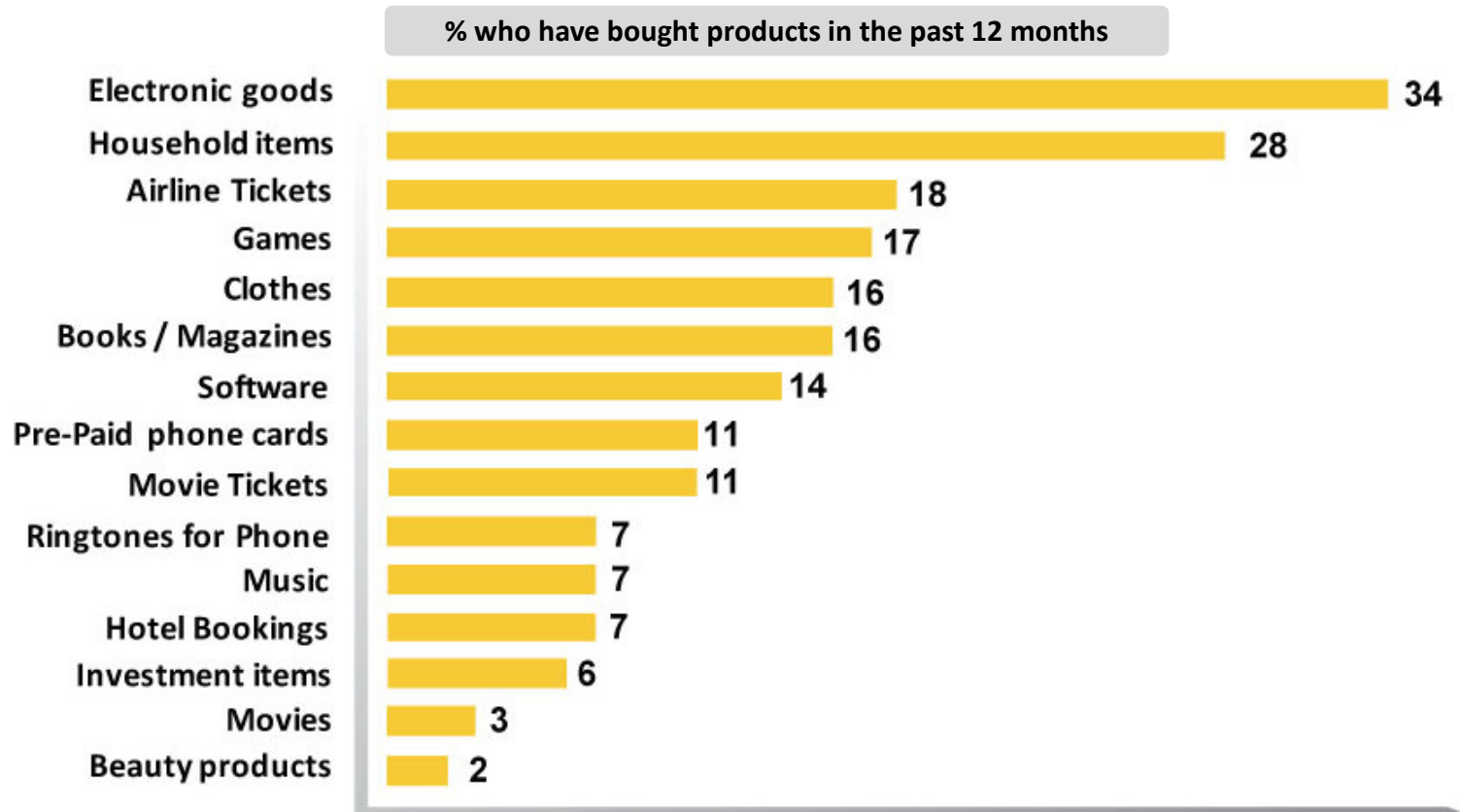
More prevalent amongst the youth and upscale



Base: Past month internet users aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: Yahoo!-TNS Net Index 2010



Consumer durables and household goods are the more frequent online purchases



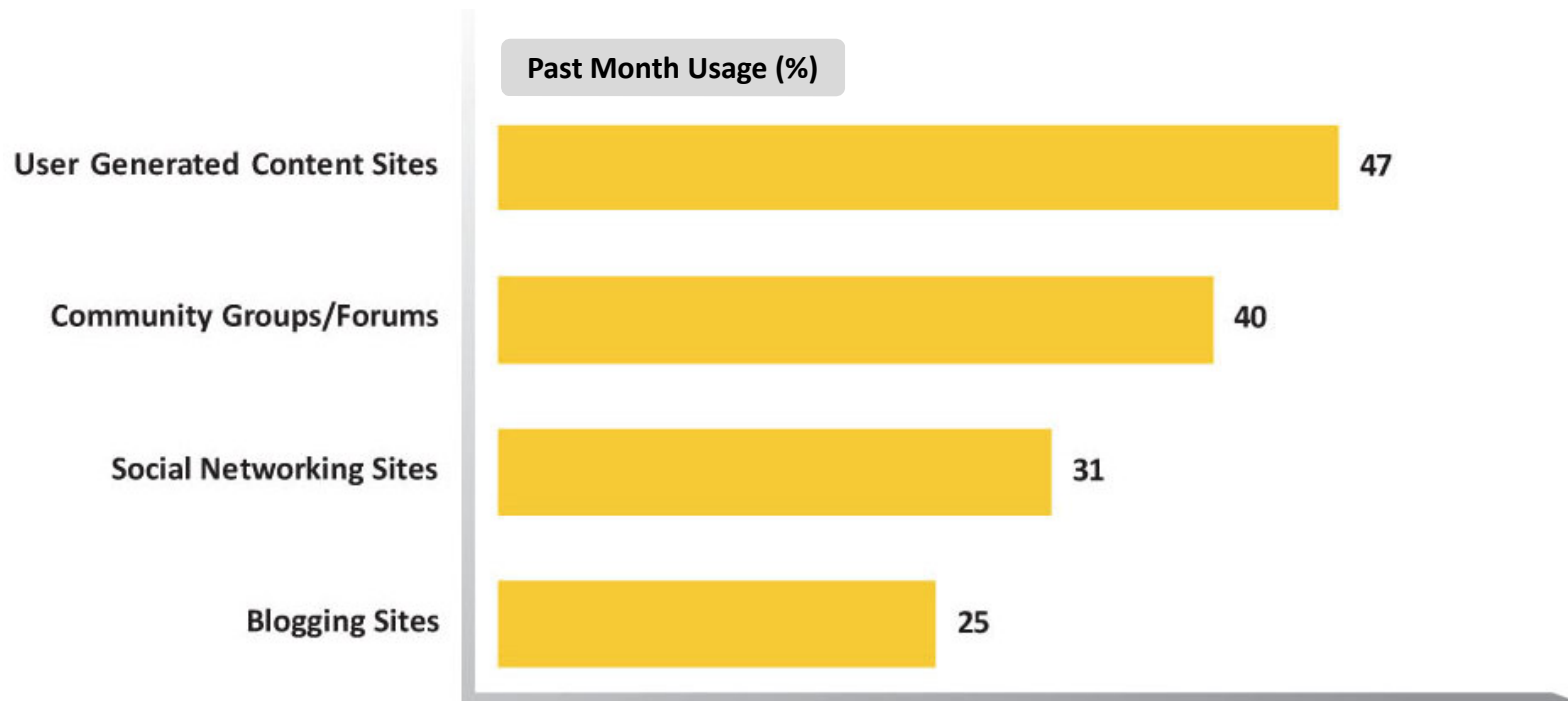
Base: Internet users aged 15+ across all 4 major cities who have transacted online in the past month
Source: Yahoo!-TNS Net Index 2010





Social media is changing
the rules of engagement

UGC sites and community groups/forums are more popular than social networking sites



Base: Past month internet users aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: Yahoo!-TNS Net Index 2010



Social media is still a youth medium

	Index Scores*								
	Male	Female	Class AB	Class CD	Class E/F	15-19 years	20-29 years	30-39 years	40+ years
UGC sites	100	100	116	92	96	112	109	88	57
Community/Groups	113	85	102	99	100	129	107	69	58
Social Networking sites	96	104	130	86	91	134	102	81	47
Blogging sites	91	111	104	96	138	147	118	36	31

* An index score above 100 (or below 100) indicates a demographic skew. Higher (lower) the score, larger (smaller) the skew.

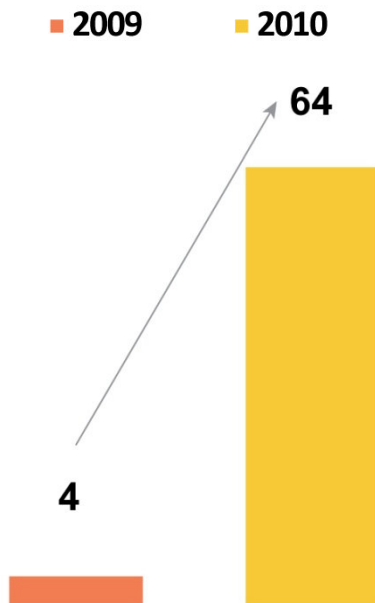
Base: Past month internet users aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)

Source: Yahoo!-TNS Net Index 2010



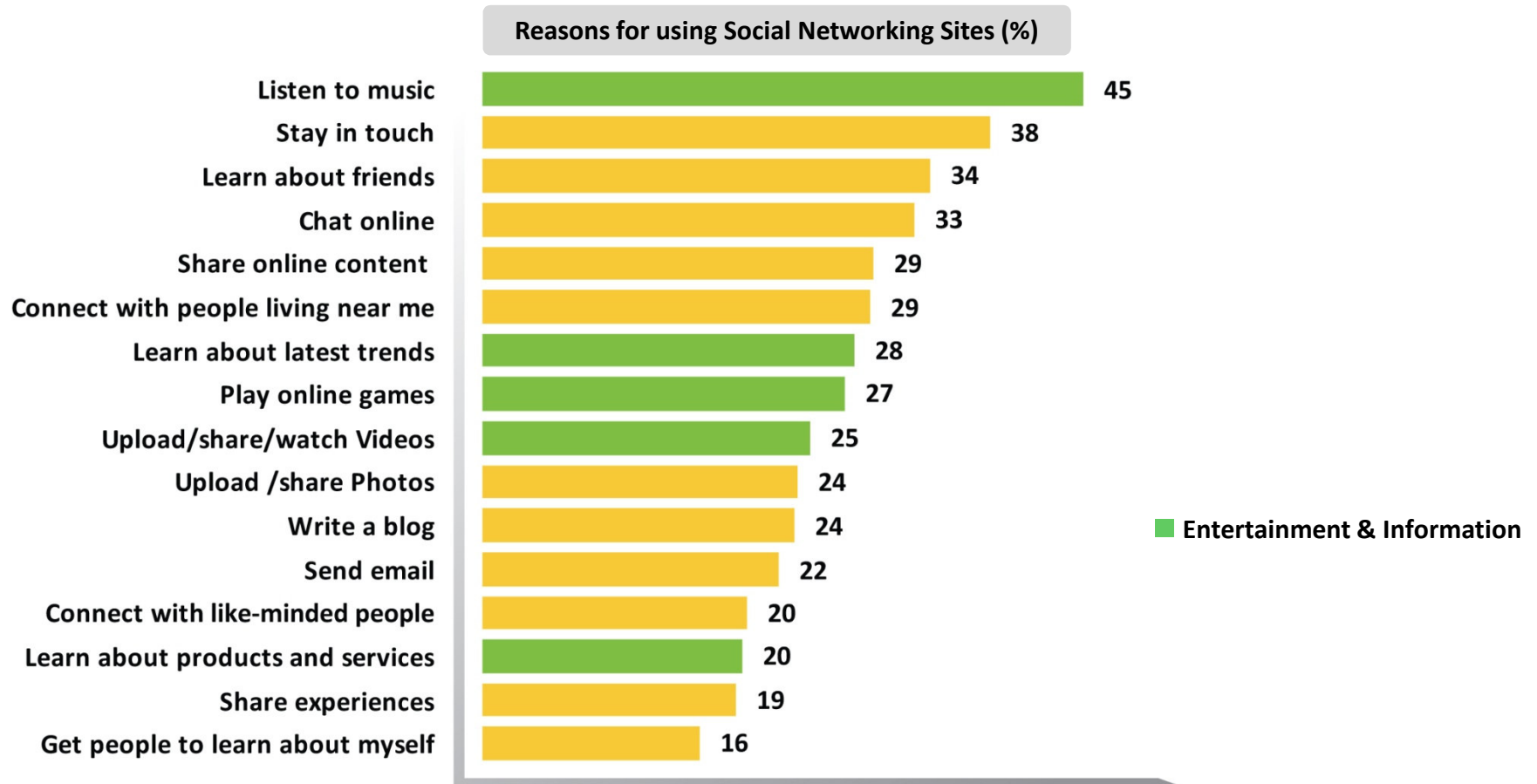
Facebook is driving the growth of the social networking category

Past Month Usage (%)



Base: Past month internet users aged 15+ across all 4 major cities (Ho Chi Minh City, Hanoi, Da Nang and Can Tho)
Source: Yahoo!-TNS Net Index 2010

Not merely for connecting and communicating...



Base: Internet users aged 15+ across all 4 major cities who have used social networking sites in the past month
Source: Yahoo!-TNS Net Index 2010



Social networks do differ for the young and 'not-so-young' ...

Social Network Contacts	Total %	Index Scores*			
		15-19 years	25-29 years	30-39 years	40+ years
Regular friends	88	105	102	99	59
Referrals from friends	31	110	120	39	59
Friends with whom you had lost contact	22	99	130	52	25
Family members	22	109	95	77	142
People from outside your city/country	22	85	121	103	30
People you only know in the virtual world	15	99	108	70	132
Co-workers	15	22	128	188	157
People you met once or twice in person	9	102	123	26	114

* An index score above 100 (or below 100) indicates a skew. Higher (lower) the score, larger (smaller) the skew.

Base: Internet users aged 15+ across all 4 major cities who have used social networking sites in the past month

Source: Yahoo!-TNS Net Index 2010



For information on Yahoo!-TNS Net Index 2010 (Vietnam)
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