

# 2011 Vietnam NetCitizens Report

## Internet Usage and Development in Vietnam

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April 2011

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# SUMMARY

## Internet usage and access

- According to official sources, internet penetration in Vietnam was at 31% by the end of 2010. Internet penetration in Vietnam is similar to countries like China, Philippines and Thailand. Vietnam has seen a more rapid growth of the internet over the last few years than most other countries in the region and is one of the fastest growing internet countries in the world.
- In urban Vietnam (12 cities included in the Vietnam NetCitizens Study 2011), more than 50% of the population have used the internet already. Hanoi has the highest internet penetration in Vietnam.
- Internet usage is mainly concentrated in higher economic classes. Whilst 70% of economic class A citizens use the internet, internet penetration is only about 20% for economic class D and E.
- Two-thirds of internet users access the internet every day, spending about 2 hours and 20 minutes on the internet on weekdays, less on weekends.
- The internet is usually accessed from home (78%) or work (31%). Internet cafes (26%) are widely used by younger Vietnamese and in smaller cities.

## Online Activities

- The most important activity on the internet is information gathering. Virtually all internet users regularly use search sites and read online news.
- Entertainment (e.g. listening to music, downloading music, watching movies, gaming) is another key activity. 78% of internet users have listened to music and 60% have downloaded music. Entertainment is far more important amongst younger people. Online entertainment activities have been growing over the past three years.
- The internet is used extensively for communication and online interaction. About 70% of internet users have already used chatting and email. 36% are a member of a social network and 20% keep their own blog.
- Online shopping and auction sites are not used very frequently yet. However, e-commerce has seen the strongest growth of all measured activities over the past 3 years.

## Visited websites

- Google and Zing are the most popular websites in Vietnam. Half of internet users have accessed Google and a third Zing, in the past 4 weeks.
- The most common online newspapers are Dan Tri, VnExpress, 24h and Tuoitre. The usage of online newspapers differs by geographical region.
- For blogging and social networking, the most popular sites are Facebook, ZingMe and Yahoo 360plus.
- Google is the favourite website for search and research activities. Zing is the preferred provider of most forms of online entertainment. Yahoo is favoured for communication activities such as e-mail and chatting.

## Internet Attitudes

- Most users think that the internet is an important source for news and information. The majority also find it useful to find out about new trends and brands. However, the information found on the internet is not always trusted.
- The internet is very useful to establish and maintain social connections for most. About half of them would describe the internet as a place where they can express themselves.
- The majority think that there is a wide choice of products available on the internet. However, a minority think it's safe to buy products online and 60% do not trust online payment systems.
- Vietnamese see the internet in a very positive light. Hardly anybody thinks that internet usage leads to social isolation, only a minority see a negative impact of the internet on young people.

## Mobile Internet

- 40% of internet users have accessed the internet by mobile phone already. Mainly the young access the internet via a mobile phone.
- Online activities from a mobile phone are similar to the activities from computers. Most important is gathering news and information, followed by social interaction.

## Demographic differences

- Internet penetration is higher amongst males and they use the internet longer per day than females. Whilst men are more likely to download movies and play games, women are more interested in visiting and writing blogs.
- Internet penetration is much higher amongst young age groups. Young people are very active online, using the internet longer and for more activities. The main activities for young people are entertainment, social networking and blogging. For older age groups the internet is used more for reading the news and gathering information.
- In Hanoi, internet penetration is higher and the internet is used longer on an average day compared to HCMC. Hanoians use the internet for online shopping, visiting forums and reading the news more often, whilst people in Saigon use the internet to chat, download music and play games more frequently.

### About Vietnam NetCitizens Report

Data in this report is based on a representative survey amongst nearly 3,400 internet users in 12 cities in Vietnam. The study is conducted by Cimigo and the report is available for free. If you are interested in a more detailed target group analysis, please contact us for a quotation.

Download this report for free: [www.cimigo.vn](http://www.cimigo.vn)  
Request your individual analysis: [contact@cimigo.vn](mailto:contact@cimigo.vn)

# 1. INTRODUCTION

## 1.1. Background

The internet in Vietnam has seen a rapid development in recent years. There has been a steady increase in both internet users, the number of websites in Vietnam and the technical resources to provide internet connections are constantly expanding. In a period of strong growth, it is vital for all companies involved with the online market to have reliable information about all relevant aspects of internet usage.

The Vietnam NetCitizens Report was initiated by Cimigo with the aim to create a better understanding of the Vietnamese internet market. The study has been available since 2003, initially across two cities; Ho Chi Minh City and Hanoi. Later the number of cities was expanded to include Da Nang, Can Tho, Hai Phong and Nha Trang. The 2011 study includes a total of 12 cities, with 6 additional tier 2 cities (Thanh Hoa, Thai Nguyen, Quy Nhon, An Giang, Dong Nai and Vung Tau).

## 1.2. Survey methodology

NetCitizens is conducted by Cimigo amongst Vietnamese internet users in urban Vietnam. This survey was conducted by Cimigo in November / December 2010, using Computer-Assisted Telephone Interviews (CATI).

More than 3,300 interviews amongst internet users in Vietnam were conducted. Respondents for the survey were selected from 12 cities in Vietnam, using the following sample sizes:

Total	n=3376
<i>Metro Vietnam</i>	
HCM	n=574
Hanoi	n=534
<i>Tier 1 cities</i>	
Hai Phong	n=320
Nha Trang	n=319
Da Nang	n=300
Can Tho	n=300
<i>Tier 2 cities</i>	
Thanh Hoa	n=204
Thai Nguyen	n=178
Quy Nhon	n=174
An Giang	n=161
Dong Nai	n=160
Vung Tau	n=152

Additionally to the internet users interviewed, the demographic profiles of more than 3,000 non-internet users were collected in order to compare users to non-users. In total, more than 6,200 interviews were conducted for the NetCitizens 2011 study.

For the selection of respondents, a random sample with quotas was captured. In each city, a representative sample of respondents was recruited using age and gender quotas based on the general urban population. The total results are weighted according to the city size to re-establish the original population proportion across cities.

### 1.3. Other data sources

- Data for internet usage and penetration in other countries was collected from [www.internetworldstats.com](http://www.internetworldstats.com)
- Data about the development of the internet penetration in Vietnam was taken from [www.vnnic.vn](http://www.vnnic.vn) (the website of VNNIC, the Vietnam Internet Network Information Center).

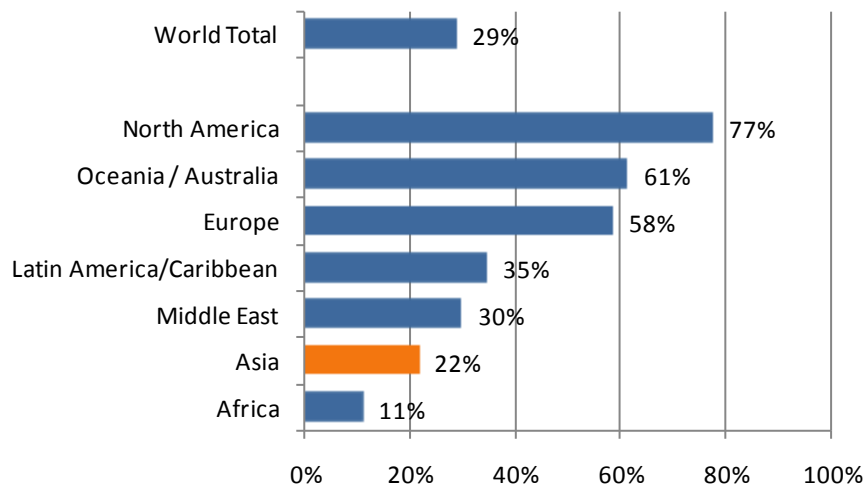
## 2. INTERNET USAGE AND ACCESS

### 2.1. Internet usage around the world and in Vietnam

By the end of 2010, nearly 2 billion people used the internet worldwide, representing about 29% of the global population. The number of internet users has increased by nearly 300 million within only one year. The highest internet penetration is found in North America (77%), Australia / Oceania (61%) and Europe (58%). In Asia, penetration is at 22% and thus second lowest next to Africa (source: internetworldstats.com).

In absolute numbers, more internet users can be found in Asia than in any other part of the world. Overall 42% of worldwide internet users are located in Asia. This is mainly due to the large population in China.

Fig. 1. Internet penetration around the world

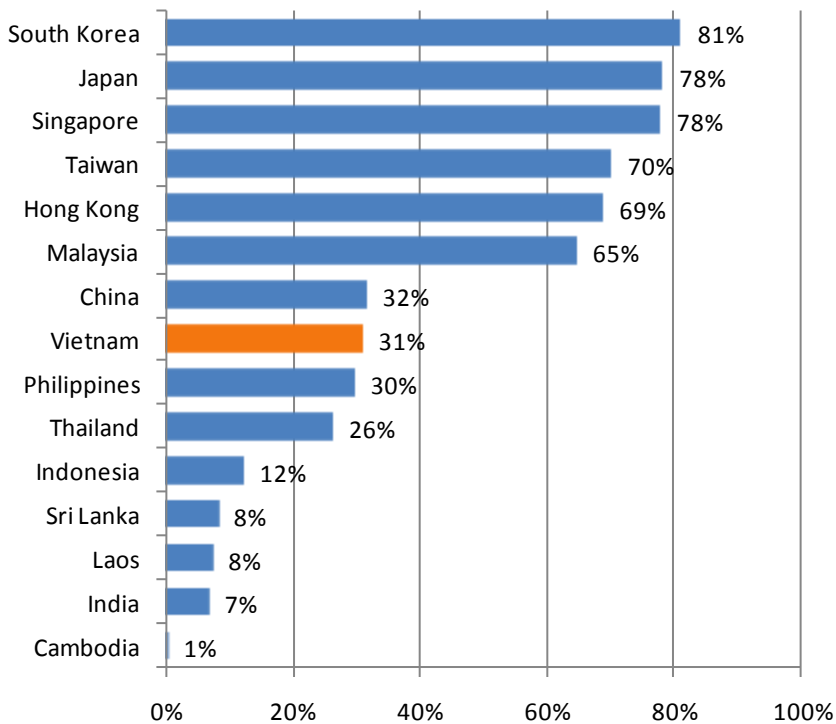


Source: [www.internetworldstats.com](http://www.internetworldstats.com)

Within key Asian countries, three different levels of internet penetration are found. In developed Asian countries (South Korea, Japan, Singapore, Hong Kong, Taiwan and Malaysia), internet usage is at 60-80%, with a slight year-to-year increase. In Asian emerging markets (China, Vietnam, Philippines and Thailand), internet penetration is around 20-30%, however internet growth rates per year are much higher. In developing markets (Laos, Cambodia) or populous countries with a large rural population (Indonesia, India), internet penetration is typically below 10%.



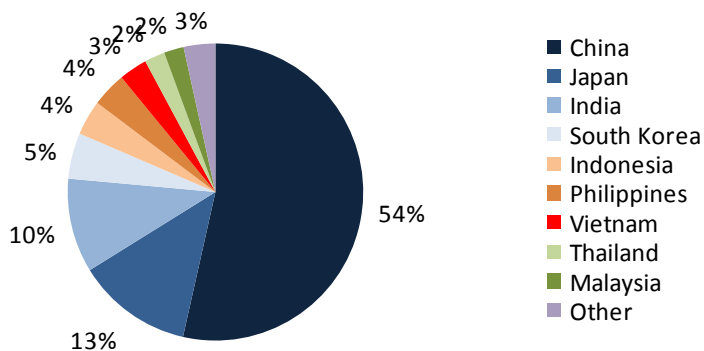
Fig. 2. Internet penetration in selected Asian countries



Source: [www.internetworldstats.com](http://www.internetworldstats.com), [www.vnnic.vn](http://www.vnnic.vn)

More than 50% of internet users in Asia are from China. The number of internet users in China is estimated at 420 million, which represents more than 20% of the worldwide internet population. Other Asian countries with a large number of internet users are Japan (99 million), India (81 million) and South Korea (39 million). According to official sources, there are currently 27 million internet users in Vietnam, which is more than in Thailand and Malaysia.

Fig. 3. Internet users in selected Asian countries

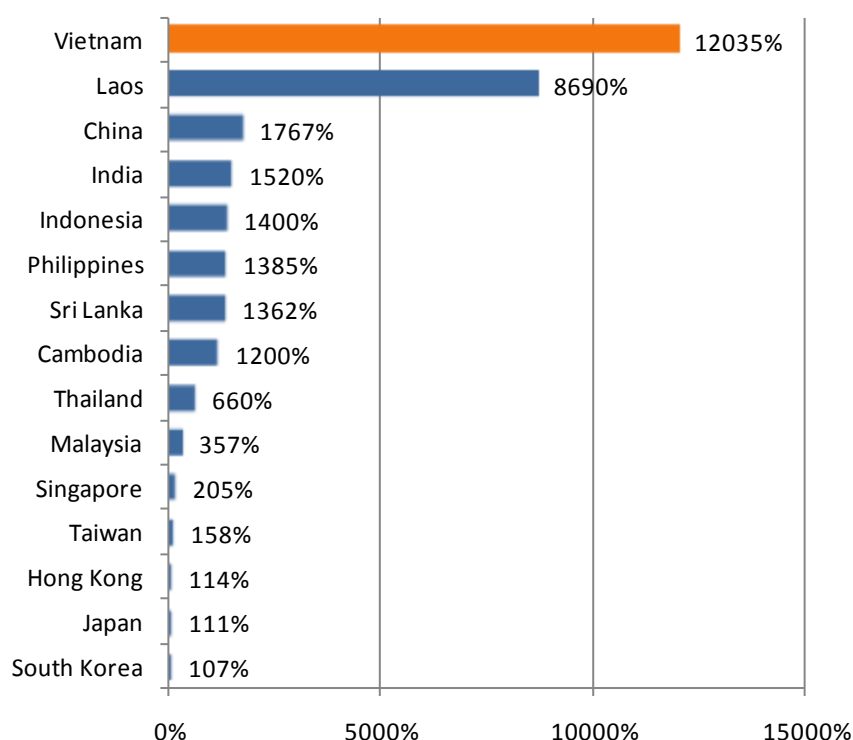


Source: [www.internetworldstats.com](http://www.internetworldstats.com)

Internet user growth rates differ strongly by country. In countries with high penetration rates, growth rates are lower than in countries with low penetration. Over the last 10 years, internet usage has grown by 100-200% in developed Asian countries (South Korea, Japan, Hong Kong, Taiwan and Singapore) and by around 500 - 1500% in Asian emerging markets.

Vietnam takes a unique position in this respect. Vietnam is the fastest growing internet country in the region and amongst the countries with the highest growth rates in the world. Since the year 2000, the number of internet users in Vietnam has multiplied by about 120. Ten years ago, internet penetration in Vietnam lied far behind most other Asian countries. In the meantime, Vietnam has caught up and internet usage has reached the level of other key emerging markets.

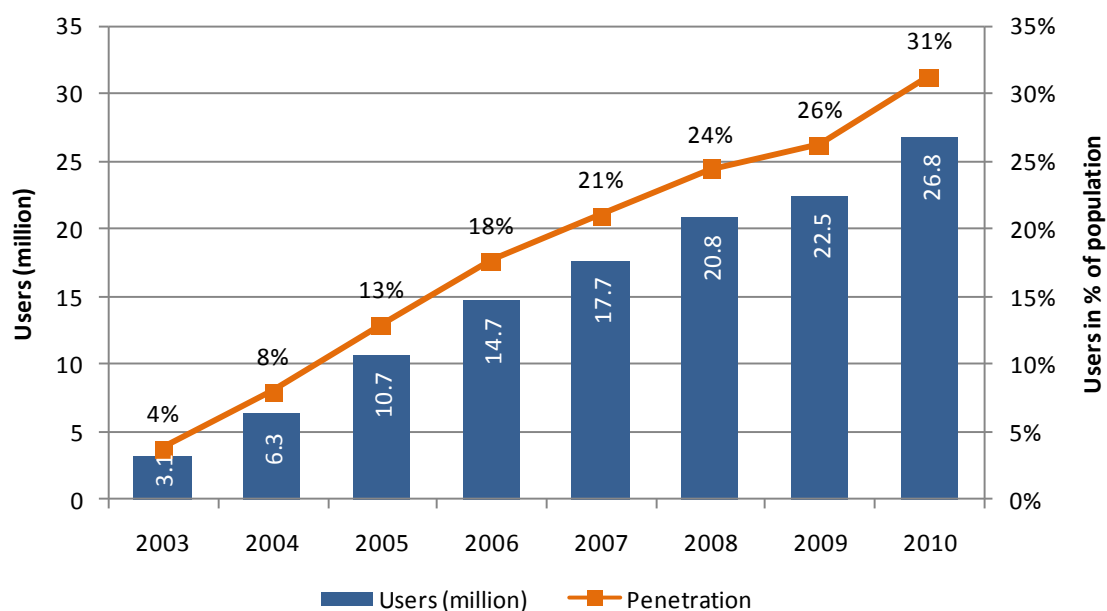
Fig. 4. Internet user growth 2000-2010 in selected Asian countries



Source: [www.internetworldstats.com](http://www.internetworldstats.com)

According to VNNIC (Vietnam Internet Network Information Center), 26.8 million people in Vietnam were using the internet by the end of 2010, representing 31% of the overall Vietnamese population.

Fig. 5. Internet users in Vietnam 2004-2010



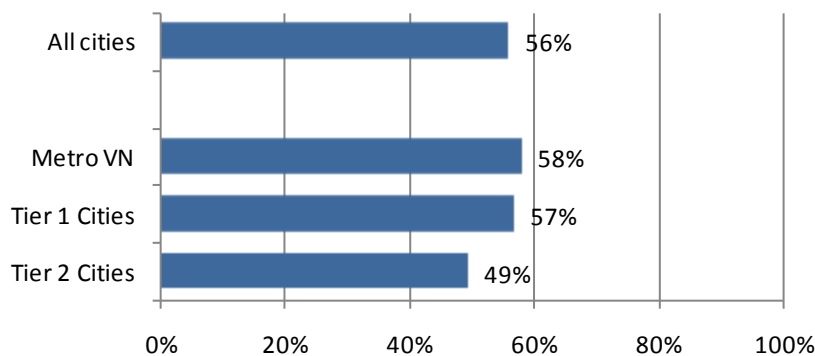
Source: [www.vnnic.vn](http://www.vnnic.vn)

## 2.2. Usage frequency and length

Amongst the cities covered in NetCitizens study, internet penetration in urban Vietnam is measured at 56%. Men (60%) are online more often than females (50%).

Internet penetration is higher in Metro Vietnam (Hanoi and HCMC) compared to smaller cities. Hanoi leads the internet penetration with 64%. In tier 1 cities (Da Nang, Can Tho, Nha Trang, Hai Phong), penetration is at around 57% and higher than in tier 2 cities. However, even in smaller cities internet penetration is nearly at 50%. Overall, it can be concluded that the majority of people living in urban Vietnam are actively using the internet<sup>1</sup>

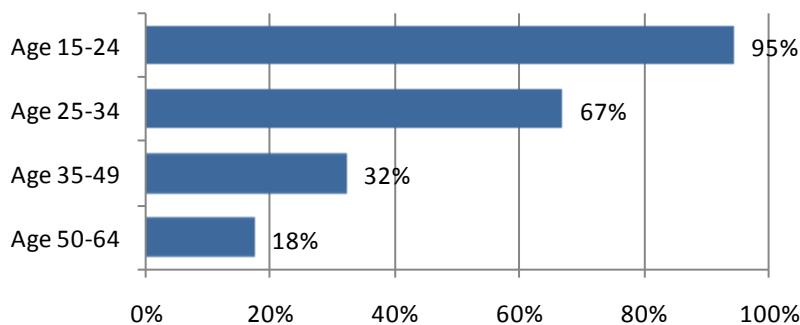
Fig. 6. Internet usage by type of city



Source: Cimigo NetCitizens

Internet usage varies by age. Amongst the young (15-24 years), internet usage is nearly universal at 95%. In the age group 25-34 years, two thirds are online. For older age groups, internet usage is lower.

Fig. 7. Internet usage by age

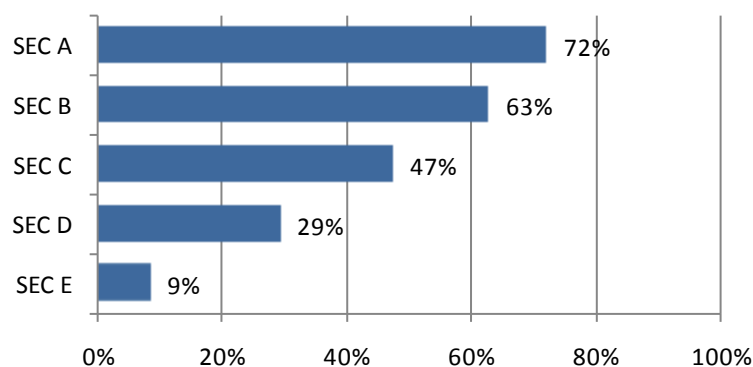


Source: Cimigo NetCitizens

<sup>1</sup> In the NetCitizens study, internet user is defined as a person living in urban Vietnam age 15+ who has accessed the internet at any time in the past. Due to differences in definition, internet penetration figures may not fully be comparable with other data sources (e.g. VNNIC figures).

As expected, the higher economic classes (SEC), who have more opportunities to access the internet, use it more often. Penetration at SEC A is over 70%, whilst it is below 10% for SEC E. In the middle economic classes (C/D), internet penetration is around 30-50%.

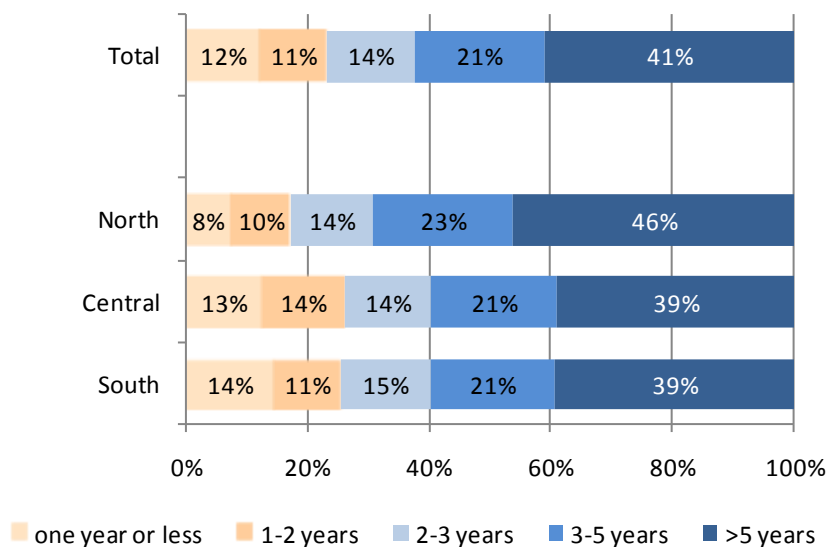
Fig. 8. Internet usage by economic class (SEC)



Source: Cimigo NetCitizens

Due to the strong growth in internet penetration, more than 20% of current users have started to use the internet within the past 1-2 years. 2 in 5 users have used the internet for more than 5 years. In the North, the share of long-term users is larger than in Central or in the South. This is due to the consistently higher internet penetration in Hanoi historically.

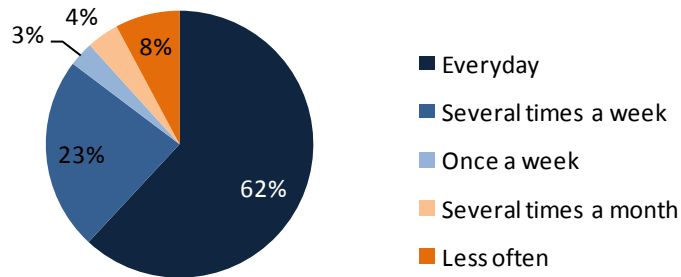
Fig. 9. Length of internet usage



Source: Cimigo NetCitizens

In Vietnam, internet users surf the internet very frequently. Nearly 90% of internet users access the internet more than once a week and more than 60% use it daily. Only a small minority of internet users (8%) use the internet less than once a week. In larger cities (Hanoi, HCMC, Danang) the internet is accessed more frequently than in smaller cities. Frequency of internet usage also increases with higher economic class. However, there is no correlation with frequency of access and age.

Fig. 10. Frequency of internet usage

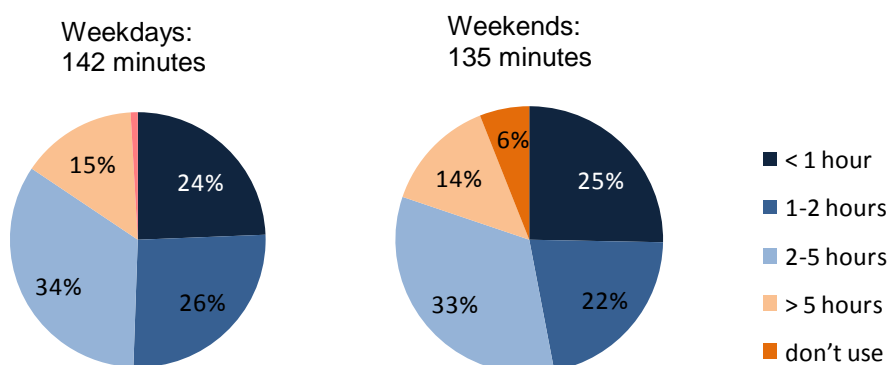


Source: Cimigo NetCitizens

Internet users in Vietnam spend considerable time online. During weekdays, the average user is online for 2 hours and 20 minutes. Male users are online 20 minutes longer than female users. The longest internet usage is measured in Hanoi with nearly 160 minutes per day (HCMC 150 minutes). Young people spend more time per day on the internet and people from higher economic classes are online for longer. Nearly half of users surf the internet for more than two hours a day.

On weekends, internet usage is reduced compared to weekdays. A minority of 6% do not use the internet on weekends at all. Only amongst young people (15-24 years), does usage not decrease during weekends.

Fig. 11. Length of internet usage



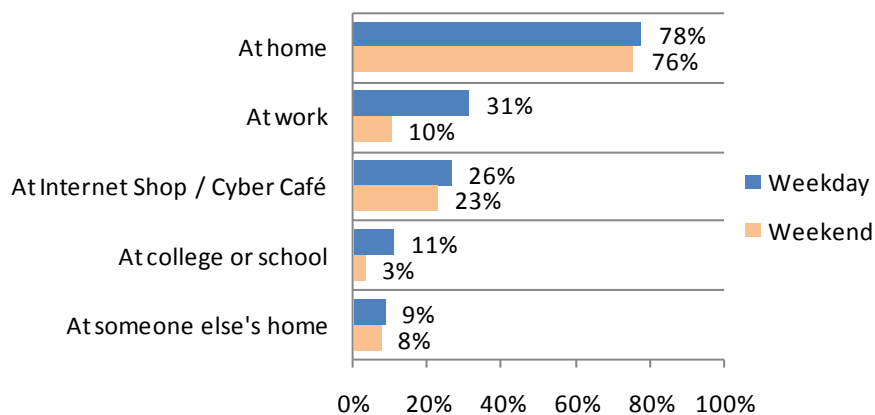
Source: Cimigo NetCitizens

## 2.3. Internet access

Most people access the internet from home (78%). Other popular places to use the internet are at work (31%) and in an internet shop or cyber café (25%). On weekends, access from work, college and internet shop / cyber café declines.

In the North (mainly Hanoi), access from home is more frequent than in other regions, internet shops / cyber cafes are less common. Internet cafes are most frequently visited by young age groups and people from lower economic classes.

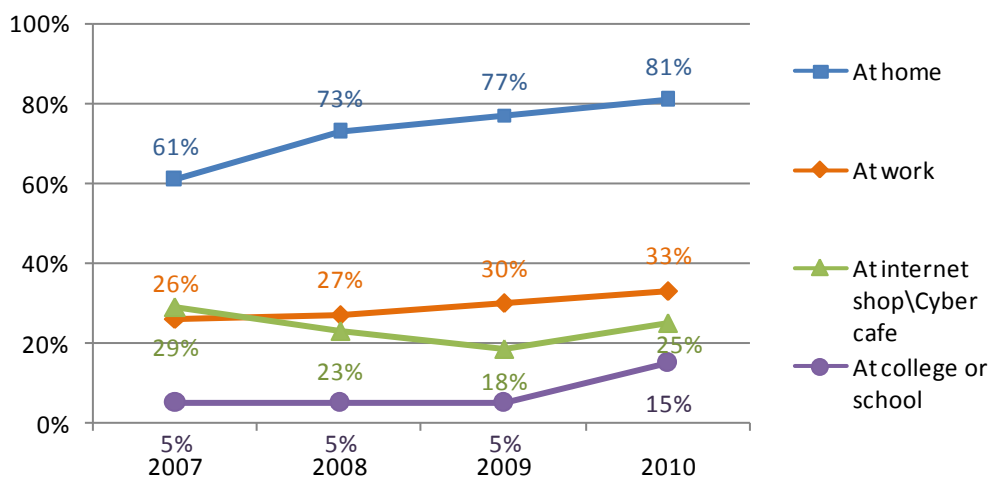
Fig. 12. Places of internet access



Source: Cimigo NetCitizens

Over the last 3 years, home access has gained in importance across all groups and regions. Internet access from home has increased by 20% since 2007. Between 2009 and 2010, access from all different places has increased (data based on internet usage on weekdays in Hanoi and HCMC).

Fig. 13. Places of internet access 2007-2010 (weekdays)

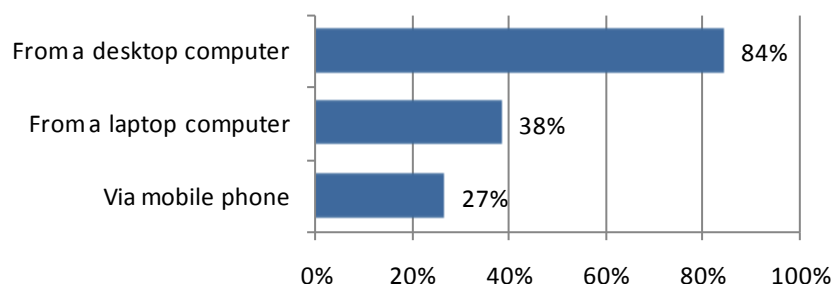


Source: Cimigo NetCitizens (Hanoi / HCMC only)

The usual way to access the internet is from a desktop computer. 80% access the internet from a desktop computer and 38% from laptops. A new way of accessing the internet is from a mobile phone (incl. smart phone), which one in four internet users usually do.

Laptop access is higher in metro Vietnam and in higher economic classes, where laptops are more prevalent. Mobile phone access, on the other hand, is not dependent on economic class but rather on age; a third of the internet users below 25 years usually access the internet from a mobile phone.

Fig. 14. Way of accessing the internet



Source: Cimigo NetCitizens

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Request your individual analysis: [contact@cimigo.vn](mailto:contact@cimigo.vn)



## 3. ONLINE ACTIVITIES AND APPLICATIONS

### 3.1. Overview

This chapter examines which activities users are engaging with online. 18 different online activities are included and have been classified into five categories:

- Information gathering
- Online entertainment
- Online communication
- Blogging and social networks
- Online business

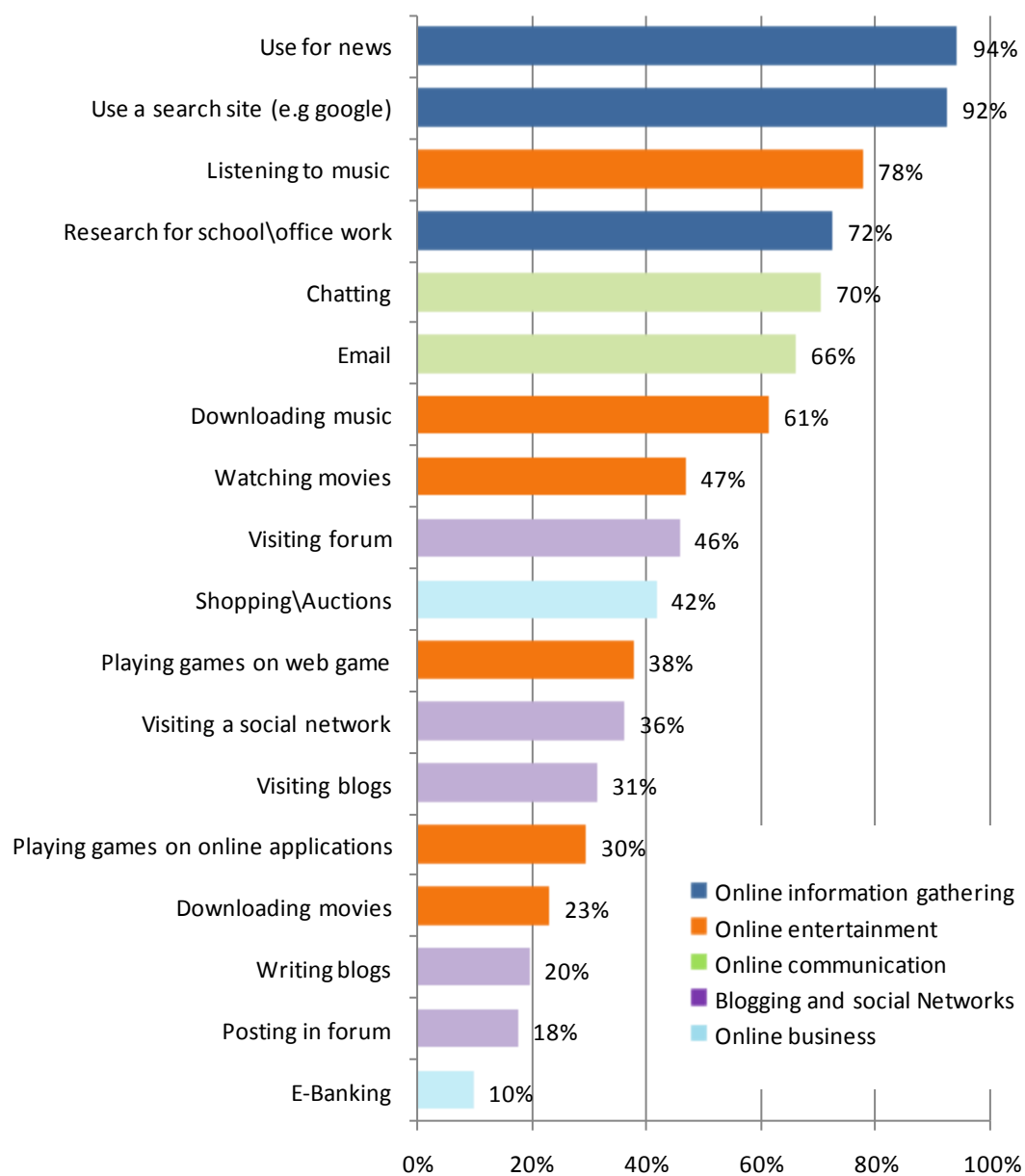
The most frequent activity on the internet is information gathering, such as reading the news or using search sites. Nearly all internet users in Vietnam use Google and read the news and most do so on a daily basis. The internet is frequently used to conduct research for school or work.

The second key field of online activity is entertainment. Music is the most popular area, nearly 80% of internet users have listened to music and more than 60% have downloaded music. Half are watching movies online and one in five have downloaded movies. Online gaming is less frequent (around 30%), but with a higher usage of web games (games that can be played online without downloading an application) than for online applications (games that have to be downloaded and installed first). Online entertainment activities are prevalent amongst the young.

Communication is a key activity on the internet. Key activities in this area are chatting and e-mails. With more interactive websites and online applications, users have the opportunity not only to retrieve information, but also to contribute their own content. Social networking and blogging are used frequently. 36% of internet users are a member of a social network and 20% keep their own blog. Networking and blogging activities are very frequent amongst the young.

E-commerce is not very developed. The most popular commerce sites are online auctions and shopping websites, which 40% of users have visited already. Online banking is still in its infancy. However, the usage of e-commerce and e-banking services has seen strong growth over the last few years.

Fig. 15. Online activities conducted in the past

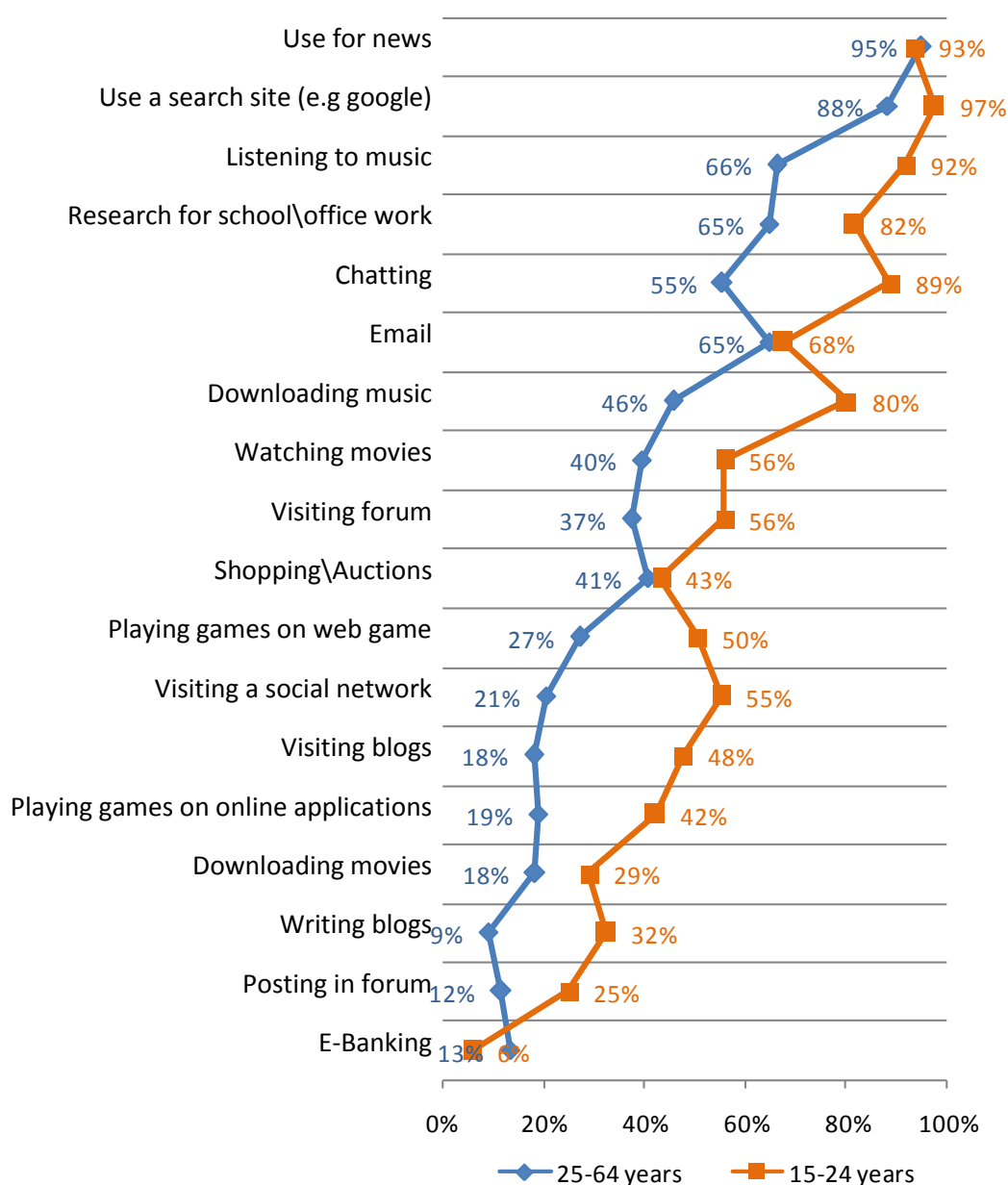


Source: Cimigo NetCitizens

The use of online activities and applications differs between age groups. In general, young internet users visit more websites and nearly all online activities measured in this report are used more frequently amongst younger age groups. The largest difference is measured for activities related to online interaction; such as visiting social networks, blogs or chatting. These activities are used nearly twice as frequently by the young age groups. Entertainment activities are considerably more popular amongst young age groups.

Some activities do not follow this pattern; reading news, e-mail, online shopping are not dependent on the user's age, but conducted by all age groups to the same extent.

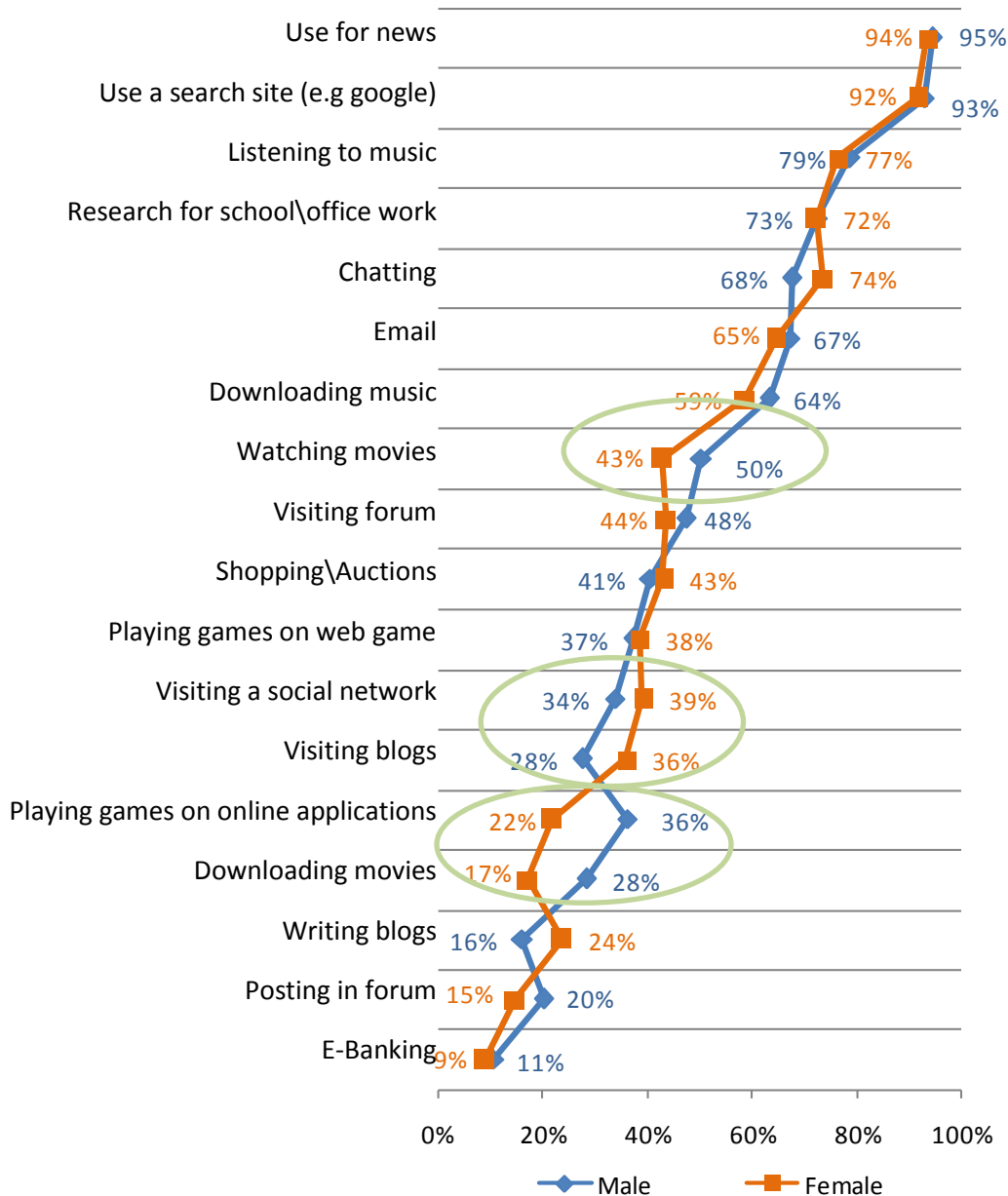
Fig. 16. Online activities conducted in the past by age group



Source: Cimigo NetCitizens

Men use the internet longer on an average day. Men conduct similar activities online as women; however there are some gender specific differences. Men watch and download movies more often and they are more likely to play online application games. On the other hand, women are more active in interactive activities, such as; chatting, social networking and blogging.

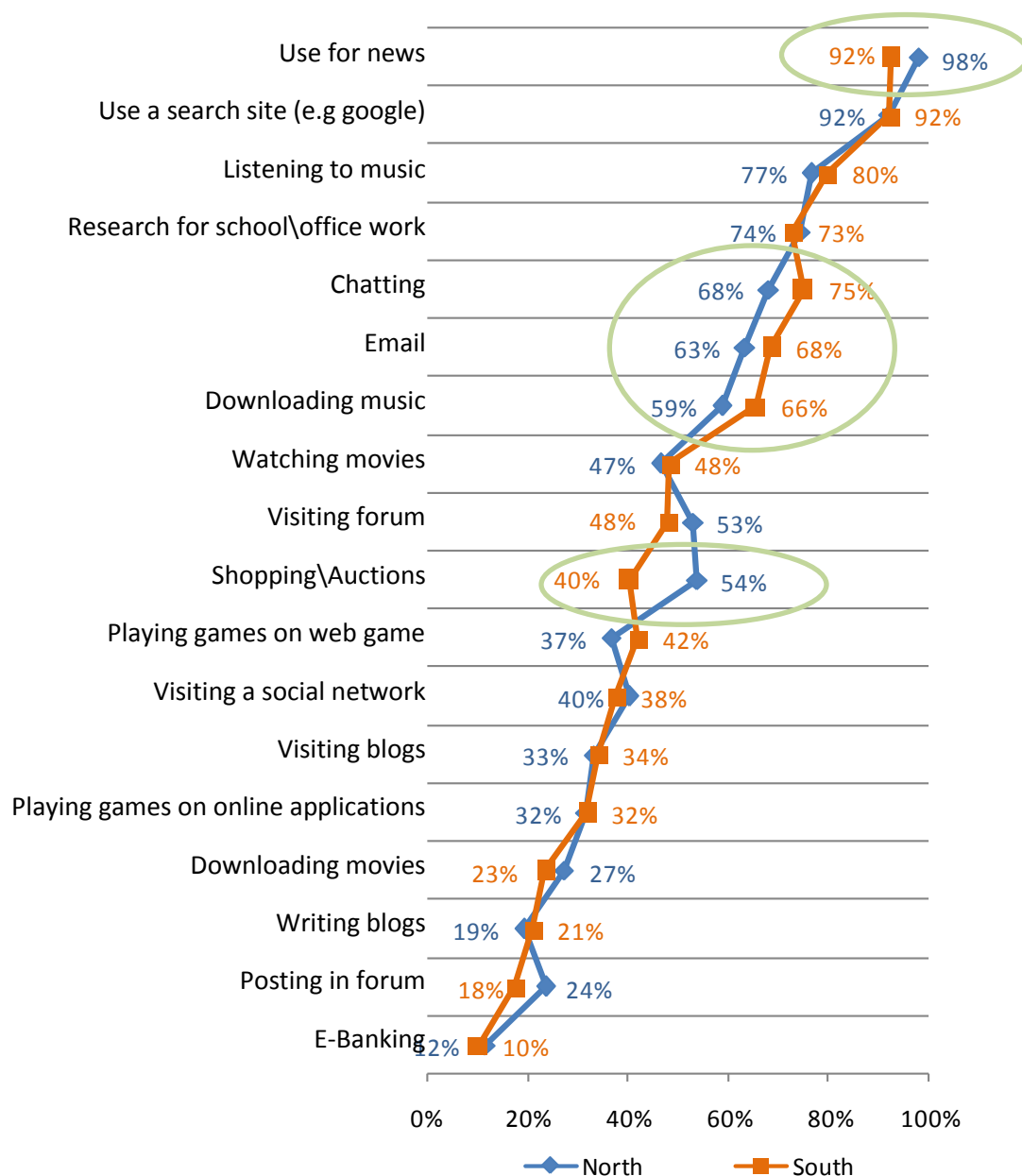
Fig. 17. Online activities conducted in the past by gender



Source: Cimigo NetCitizens

There are some geographical differences between the North and the South, which are mainly reflected in the different usage patterns between Hanoi and HCMC. In the North, the internet is used for news, visiting forums or shopping sites more often. Online shopping is nearly a third higher in the North than in the South. On the other hand, in the South people are using the internet for chatting, e-mail and downloading music more frequently.

Fig. 18. Online activities conducted in the past by geographical region



Source: Cimigo NetCitizens

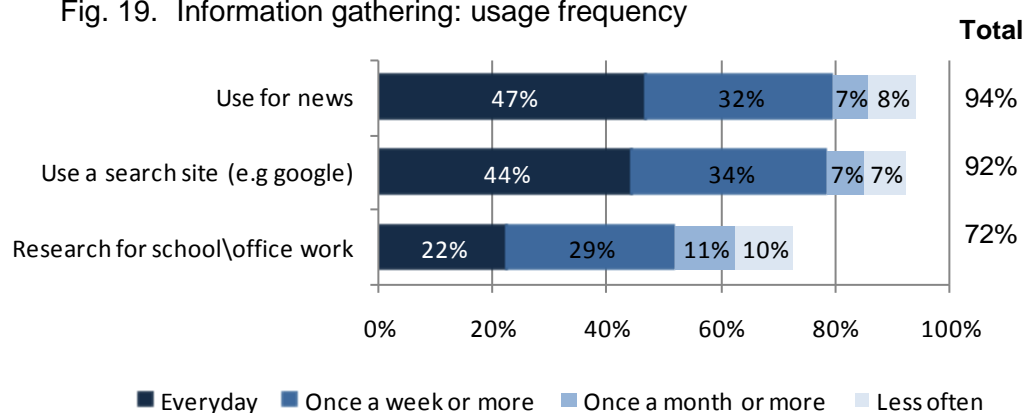
## 3.2. Information gathering

The category “Information gathering” includes the following three activities: 1) use for news, 2) using search sites, 3) research for school or work.

Reading the news is the most popular activity on the internet. Nearly 95% are reading news on the internet and 50% do so daily. Search sites such as Google are also visited daily by half of internet users. Research for school / work is conducted by more than 50% once a week or more.

Reading news and using search sites are the most common online activities across all age groups and geographical regions in Vietnam. Usage of news increases with higher economic classes and is higher in Metro Vietnam (mainly Hanoi). Search sites such as Google are visited by younger people more often.

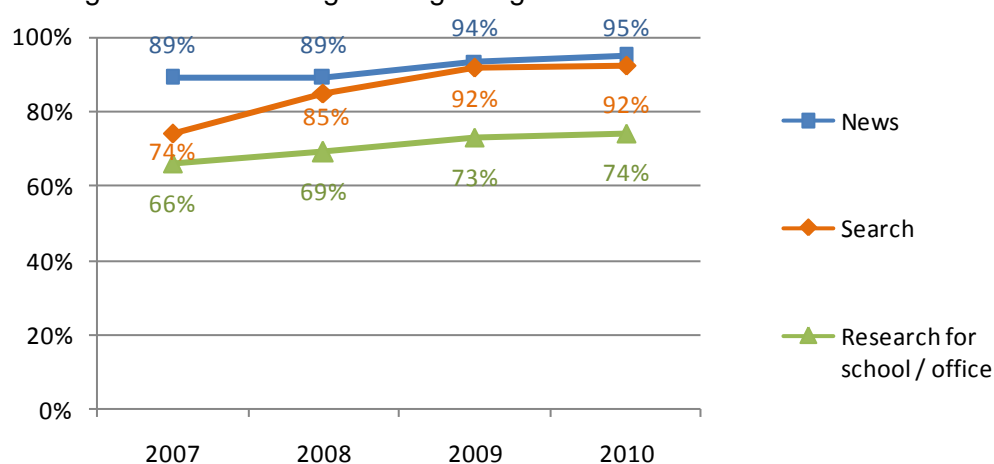
Fig. 19. Information gathering: usage frequency



Source: Cimigo NetCitizens

Over the past 3 years, the usage of online search sites has gained in importance. Less than 75% used search sites in 2007, now more than 90% do so. Reading the news online and doing research for work / school has also increased.

Fig. 20. Information gathering: usage 2007-2010



Source: Cimigo NetCitizens (Hanoi / HCMC only)

### 3.3. Entertainment

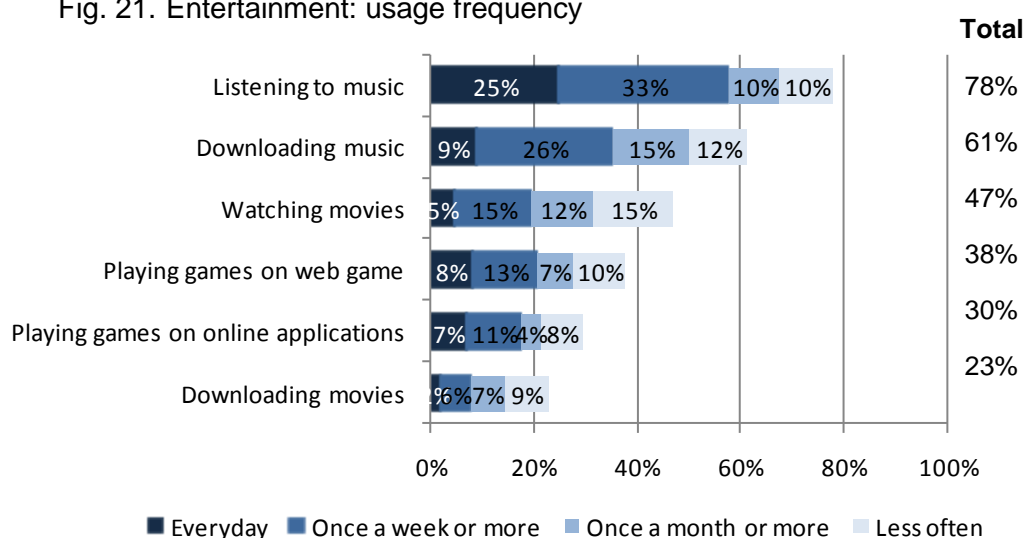
Online entertainment includes the following activities: 1) listening to music, 2) downloading music, 3) watching movies, 4) downloading movies, 5) playing games on web game,<sup>2</sup> and 6) playing online games on online applications.<sup>3</sup>

Entertainment is a key field of internet usage in Vietnam. The main activity related to entertainment is listening to music, which more than half of internet users do on a regular basis. 60% have downloaded music already and 40% do it once a week or more often. Nearly half of internet users have already watched movies online. Gaming is less popular for the majority of internet users; however there is a core of about 8% of internet users who game every day.

Entertainment is clearly an activity for younger people. Internet users from 15 -24 years use all online entertainment activities significantly more often. The largest age difference can be found for listening / downloading music and online application gaming.

Some entertainment activities are more popular with males than females. A gender specific usage difference is mainly observed for activities that require more advanced technical equipment, such as playing games on online applications and downloading movies.

Fig. 21. Entertainment: usage frequency

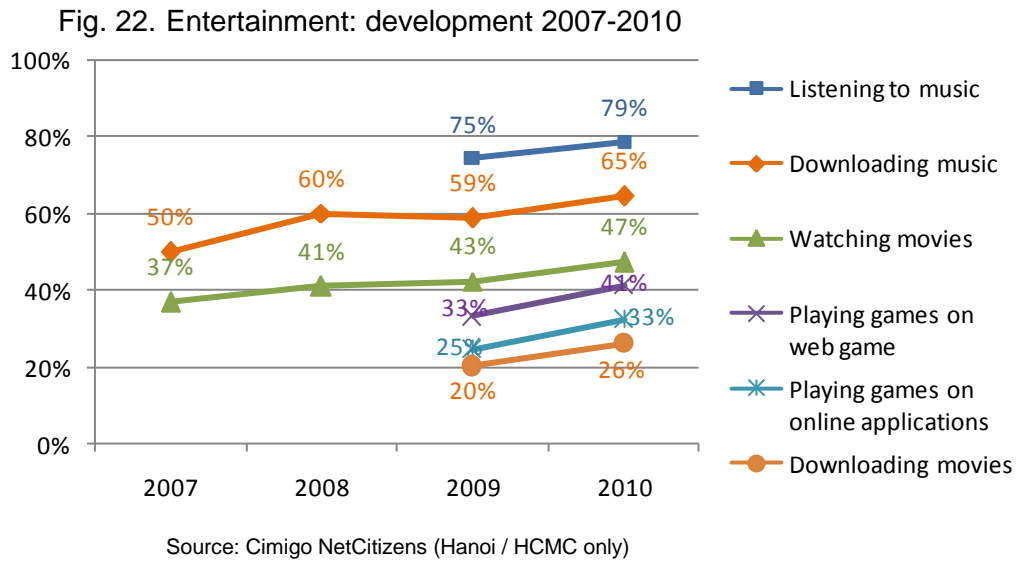


Source: Cimigo NetCitizens

<sup>2</sup> Web games are games that can be played on a website without downloading to the computer

<sup>3</sup> Online application games have to be downloaded to the computer first and can then be played independently from the website

The share of internet users that download music has increased by 15% over the past 3 years and watching movies on the internet has increased by 10% since 2007.



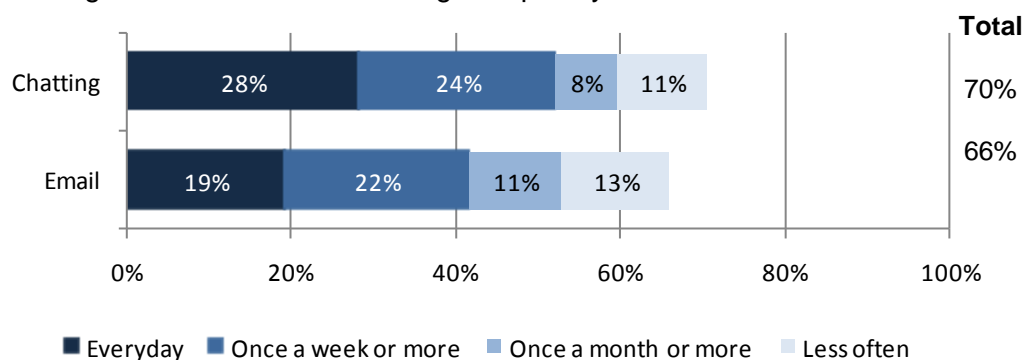


### 3.4. Communication

“Communication” in this report includes 2 activities: 1) e-mail and 2) chatting.

Communication plays an important part in internet usage. Chatting and e-mail are a very frequent form of online communication. Chatting online is more popular than writing an e-mail. Chatting is one of the most popular activities for young internet users, nearly half of 15-24 year olds chat on a daily basis. Whilst e-mail is used more frequently by 25-34 year olds.

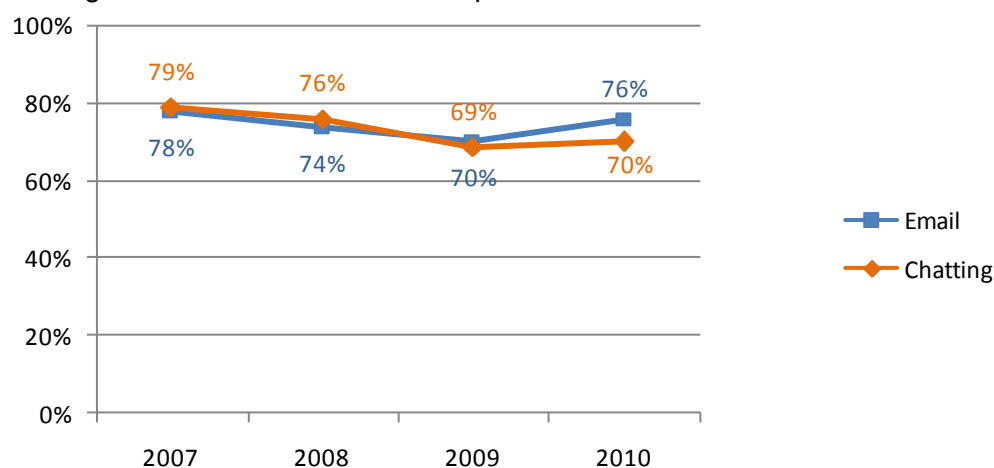
Fig. 23. Communication: usage frequency



Source: Cimigo NetCitizens

Using e-mail and chatting decreased between 2007 and 2009, but increased slightly in 2010.

Fig. 24. Communication: development 2007-2010



Source: Cimigo NetCitizens (Hanoi / HCMC only)

### 3.5. Blogging and social networks

The category “Blogging and social networks” includes the following five activities: 1) visiting forums, 2) posting in forums, 3) visiting blogs, 4) writing blogs and 5) visiting a social network.

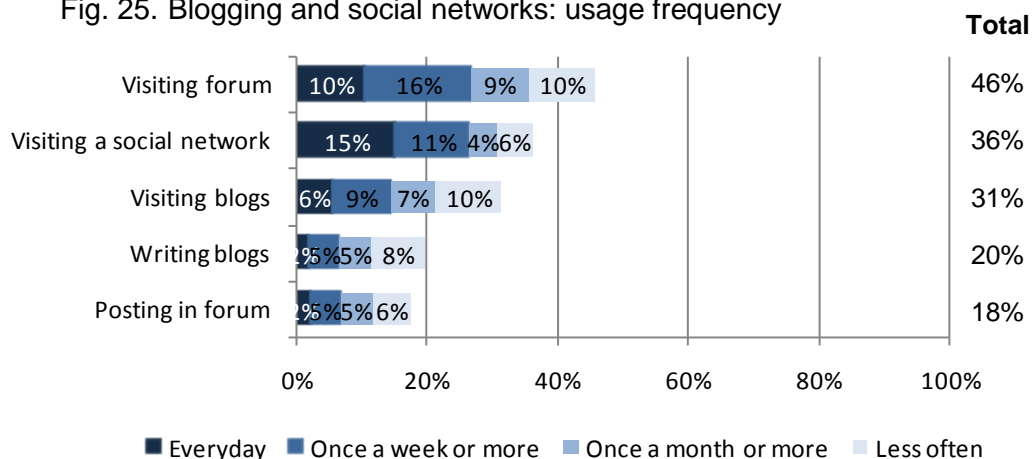
Blogs and social networks are used by a substantial number of people in Vietnam and constitute an important part of the internet life. Nearly half of internet users have already visited forums, blogs and social networks. Daily usage is highest for social networks (15%), whilst forums and blogs are visited on a weekly basis more often. An average user takes a rather passive role in blogging; whilst 30% have visited blogs, only 20% have actually written a blog themselves. The same pattern is observed for forums: 50% have already visited a forum, but only 18% have actively posted in a forum.

Blogging and social networking is clearly a field of activity for the young people. The majority of internet users below 25 have already visited a forum, blog and social network, usage is about 50% higher than older age groups. The main difference between age groups lies in the active contribution of content to the internet; users aged below 25 years are posting in forums and writing blogs three times as often as those to users aged 25-65 years.

An interesting difference can be observed between genders. Females are visiting and writing blogs more often, whilst visiting and posting in forums is more popular with males. Also social networks are used by females more often.

Use of all blogging and social networking activities increase with higher economic class. People from economic class A are twice as likely to use social networks than internet users from economic class D/E. Usage of forums is higher in the North (mainly Hanoi).

Fig. 25. Blogging and social networks: usage frequency

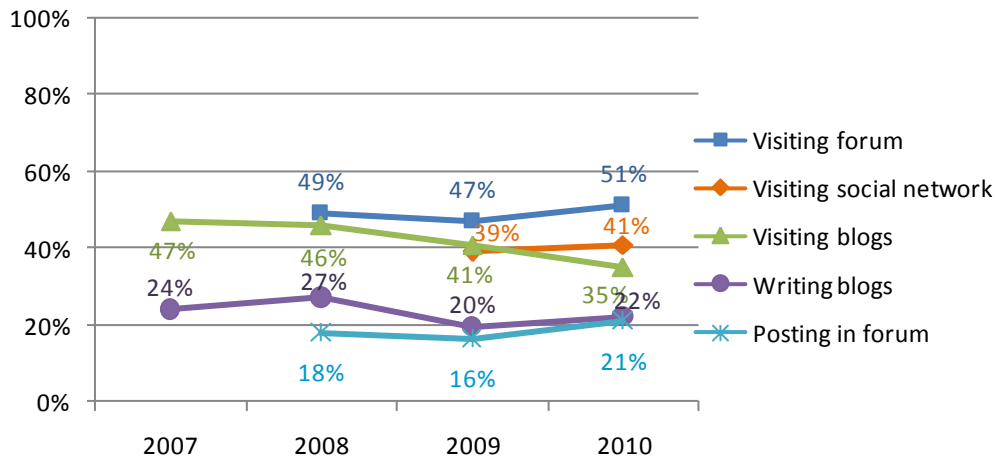


Source: Cimigo NetCitizens

Usage of forums and social networks has been on a constant level since 2007. A decrease can be found for visiting blogs with a drop from 47% to 35%. The main reason for this might be the closing of Yahoo 360 in 2009, which had been by far the most popular blogging application in previous years.

Note that these figures are percentages and not absolute numbers. With a growing internet penetration, the absolute number of people using blogs and social networks is increasing strongly.

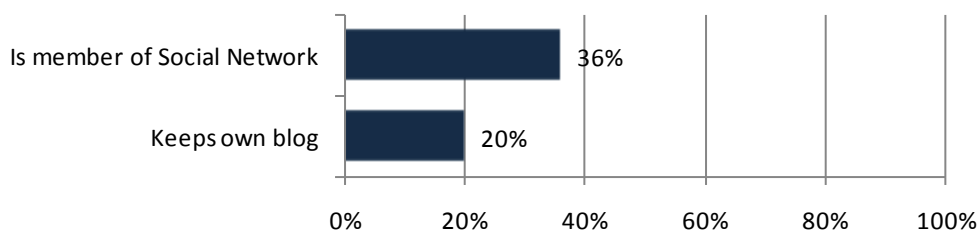
Fig. 26. Blogging and social networks: development 2007-2010



Source: Cimigo NetCitizens (Hanoi / HCMC only)

36% of internet users are a member of a social network and 20% keep their own blog. Membership in social networks and blogs are more common amongst females. Membership in social networks increases with higher economic classes and is more popular amongst young age groups.

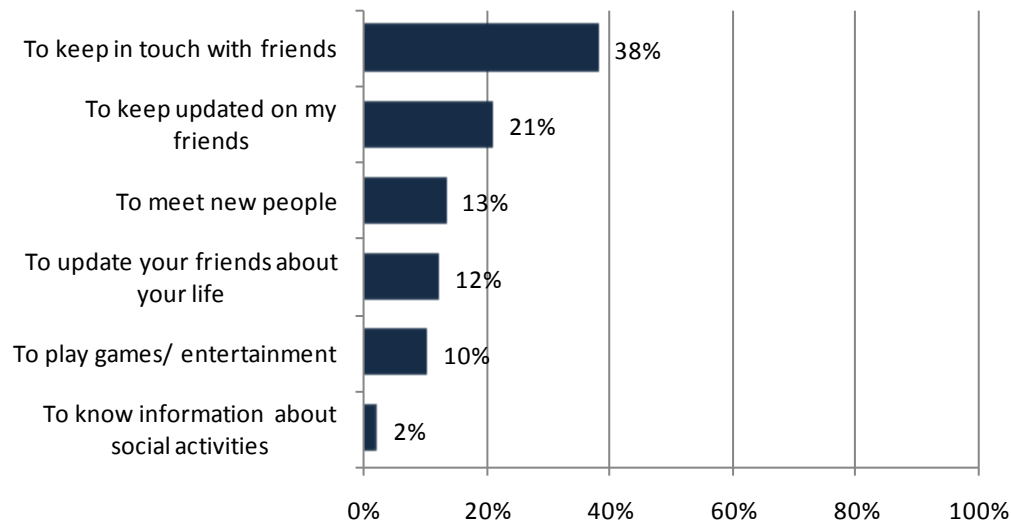
Fig. 27. Blogs and memberships in social networks



Source: Cimigo NetCitizens

The most important reason to use social networks is to keep in touch and be updated about friends. Meeting new people is also a key area of interest. Playing games or getting information about social activities / events is of far less importance in social networks.

Fig. 28. Reasons to use social networks



Source: Cimigo NetCitizens

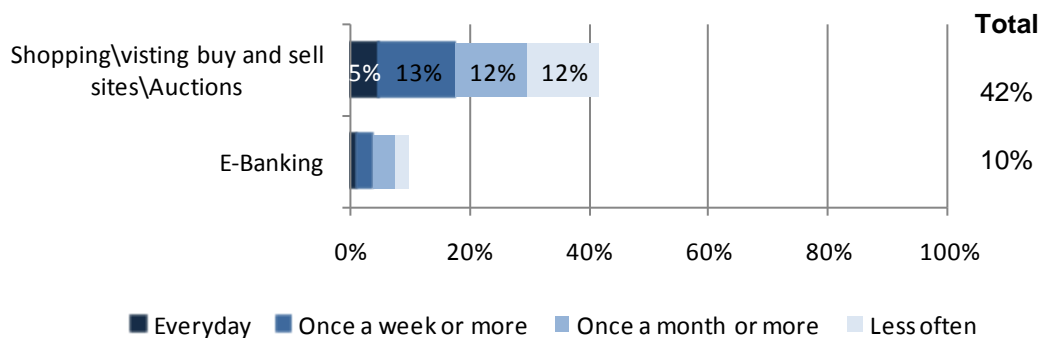
### 3.6. Online Business

The category “Online business” includes the following activities: 1) e-banking and 2) online shopping / visiting buy and sell sites / auctions.

Online business is not well developed. Only about 40% of internet users in Vietnam have ever visited an online shopping or auction site and very few have ever used e-banking.

Online shopping is more frequent in the North (58% in Hanoi) and most popular with the age groups 25-34. Both online shopping and e-banking are more common in higher economic classes.

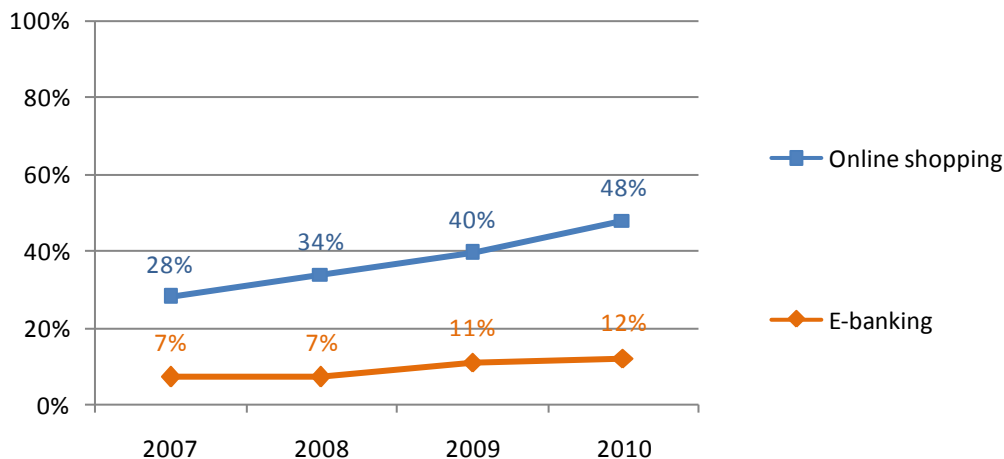
Fig. 29. Online business: usage frequency



Source: Cimigo NetCitizens

Online shopping has seen the strongest increase of all measured activities in the last few years. Online shopping has nearly doubled since 2007. Also e-banking has become more popular in this time period, increasing from 7 to 12%.

Fig. 30. Online business: development 2007-2010



Source: Cimigo NetCitizens (Hanoi / HCMC only)

## 4. WEBSITES VISITED

### 4.1. Websites visited in the past 4 weeks

This chapter highlights the websites that survey respondents have recently used during Nov-Dec 2010.<sup>4</sup>

Google continues being the most widely used website in Vietnam. Nearly half of internet users have used Google in the past month. Google is popular across gender, age groups, economic class and geographical regions.

Zing is the website with the second largest penetration. One in three internet users in Vietnam have used one of the various Zing websites in the past month. Amongst the different services Zing offers (movies, music, games, news, chat etc), mp3.zing.vn is the most popular with a penetration of 22%.

Dan Tri (dantri.com.vn) claims third place and is continuing to be the leading news website in Vietnam. Dan Tri is highly used in the North, but less in Central and the South.

About one in five internet users has recently used Yahoo. Included in this figure are yahoo.com, yahoo.com.vn, Yahoo messenger and Yahoo mail.

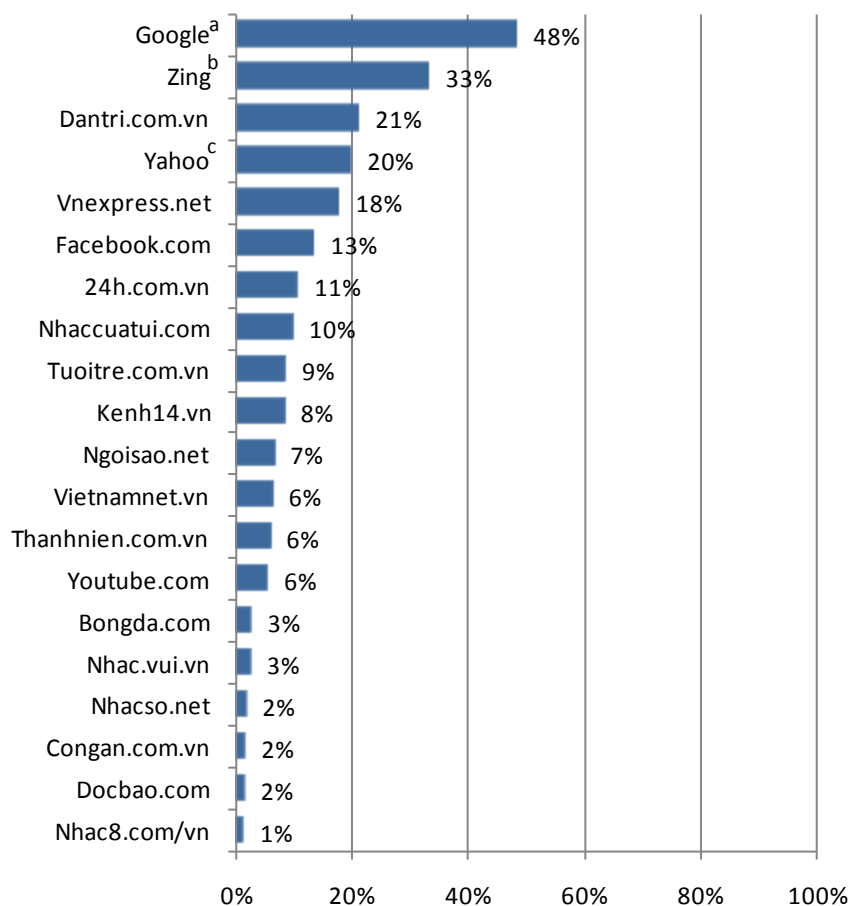
Vietnamese online newspapers; VnExpress (vnexpress.net) and 24h.com.vn have been used by 18% and 11% respectively, maintaining their position in the top 10. Tuoi Tre (tuoitre.com.vn) and Kenh14.vn reach nearly 10% penetration.

Facebook continues to be the leading social network website and jumped from 10<sup>th</sup> most visited site last year to 6<sup>th</sup> place this year with a 13% penetration.

The following ranking consists of a mix of online entertainment sites (nhaccuatui.com, nhac.vui.vn, nhacso.vn, nhac8.com, youtube.com), targeted to the youth with; music, sports, gaming sites etc.

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<sup>4</sup> Results in this chapter refer to the penetration of websites in the overall population of internet users in Vietnam. Penetration is measured with the % of internet users who have used specific websites in the past 4 weeks. Penetration doesn't take into consideration the frequency of visit, length of visit nor the number of clicks. Therefore, numbers reported in this chapter might differ from results reported by analytical website measurement tools, where website performance is usually measured with 'page views', 'unique visitors', 'unique visits' or similar metrics.

Fig. 31. Websites visited in past 4 weeks<sup>5</sup>

Source: Cimigo NetCitizens

a) incl. google.com, google.com.vn

b) incl. mp3.zing.vn, zing.vn, me.zing.vn, kiemthe.zing.vn, movie.zing.vn, news.zing.vn, volam.zing.vn

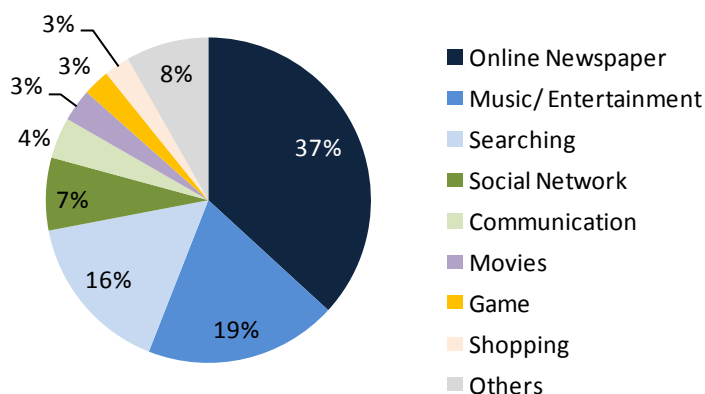
c) incl. yahoo.com, yahoo.com.vn, yahoo messenger, mail.yahoo.com, yahoo 360plus

Overall more than 2000 different websites were captured in this study. To give a better overview, websites were classified based on their main content and aggregated.

Online newspaper websites are used more than last year. When surfing the internet, users mainly go to search, news or music sites. Other popular website groups are social networks, games, shopping and movies.

<sup>5</sup> Time period Nov-Dec 2010

Fig. 32. Websites visited in past 4 weeks (classified)



Source: Cimigo NetCitizens

There is strong difference in website usage by age group. Younger users tend to use more websites than older users; therefore penetration of most websites is usually higher amongst young people.

Amongst the age group 15-24, Google and Zing are the two top sites, with penetration above 50%. Internet users aged 25-34 are predominantly focused on online newspapers and use of music and entertainment sites drops considerably. Internet users 35+ are focused on online newspapers and use entertainment sites to a very small extent only.

Fig. 33. Websites visited in past 4 weeks by age group

Website	Total	15-24	25-34	35-49	50-64
Google <sup>a</sup>	48%	53%	45%	45%	40%
Zing <sup>b</sup>	33%	55%	21%	8%	5%
Dantri.com.vn	21%	16%	25%	28%	23%
Yahoo <sup>c</sup>	20%	21%	21%	16%	12%
Vnexpress.net	18%	12%	26%	19%	10%
Facebook.com	13%	24%	7%	2%	0%
24h.com.vn	11%	8%	14%	10%	9%
Nhaccuatui.com	10%	15%	7%	3%	2%
Tuoitre.com.vn	9%	5%	10%	12%	18%
Kenh14.vn	8%	16%	2%	1%	1%

Source: Cimigo NetCitizens

a) incl. google.com, google.com.vn

b) incl. mp3.zing.vn, zing.vn, me.zing.vn, kiemthe.zing.vn, movie.zing.vn, news.zing.vn, volam.zing.vn

c) incl. yahoo.com, yahoo.com.vn, yahoo messenger, mail.yahoo.com, yahoo 360plus

The usage of online newspapers differs by geographical region. Dantri and 24h are used mainly in Hanoi, whilst penetration of Tuoitre is high in HCMC. News websites are used more often in Metro Vietnam compared to smaller cities.



Fig. 34. Websites visited in past 4 weeks by city

Website	Total	HCMC	Hanoi	Tier 1	Tier 2
Google <sup>a</sup>	48%	40%	38%	73%	52%
Zing <sup>b</sup>	33%	35%	24%	41%	31%
Dantri.com.vn	21%	8%	46%	28%	15%
Yahoo <sup>c</sup>	20%	18%	15%	31%	18%
Vnexpress.net	18%	19%	30%	10%	9%
Facebook.com	13%	14%	19%	13%	7%
24h.com.vn	11%	5%	16%	15%	12%
Nhaccuatui.com	10%	11%	4%	13%	11%
Tuoiitre.com.vn	9%	12%	1%	11%	7%
Kenh14.vn	8%	7%	14%	9%	6%

Source: Cimigo NetCitizens

a) incl. google.com, google.com.vn

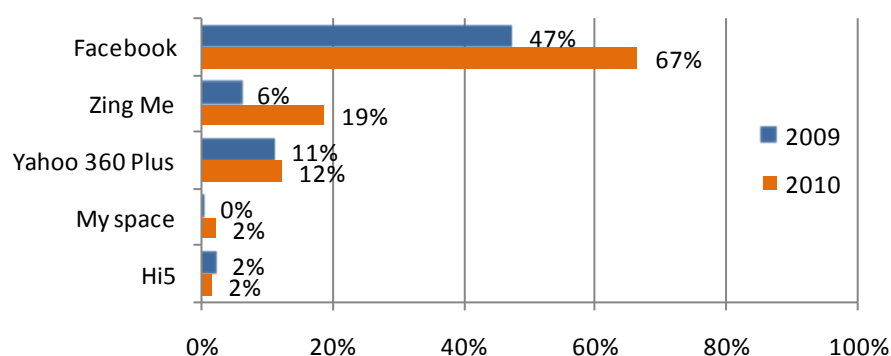
b) incl. mp3.zing.vn, zing.vn, me.zing.vn, kiemthe.zing.vn, movie.zing.vn, news.zing.vn, volam.zing.vn

c) incl. yahoo.com, yahoo.com.vn, yahoo messenger, mail.yahoo.com, yahoo 360plus

## 4.2. Websites used for blogging and social networking

In 2010, Facebook has been the most popular social networking website for internet users. Nearly 70% of those who use social networks had a membership on Facebook. Zing Me tripled within one year and climbs to the second place with nearly 20% of social networking users. Yahoo 360 Plus was used by 12% with little difference to 2009. Other less popular social networks are Myspace and Hi5.<sup>6</sup>

Fig. 35. Websites used for Social Networks

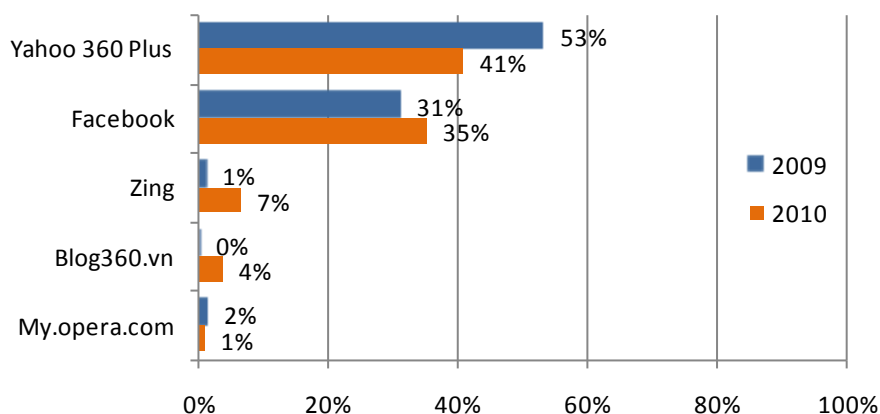


Source: Cimigo NetCitizens (percentages based on users who are a member of a social network)

<sup>6</sup> Social networks are defined as websites where you can create your own profile, invite friends and communicate with other members.

In terms of websites for blogs, Yahoo 360plus, the successor of Yahoo 360, is still the most important blog website but the penetration has decreased from 53% to 41%. Facebook is used by 35% as a blog. The newcomer of this field is Blog360.vn, a local blogging website which is used by 4%.<sup>7</sup>

Fig. 36. Websites used for blogs



Source: Cimigo NetCitizens (percentages based on users who have their own blog)

<sup>7</sup> A Blog is defined as a personal online journal that is frequently updated and intended for general public consumption

## 4.3. Most favourite websites

Respondents specified their preferred website for individual activities. Activities are grouped into the following categories:

- Information gathering
- Online entertainment
- Online communication
- Online business
- Online forums

### 4.3.1. Information gathering

Google is the unchallenged favourite in Vietnam for internet search or research. Nearly 90% use Google as their preferred search site and 50% prefer it for school / work research.

Preference for online newspapers is more varied. Overall, the top 3 popular news websites are Vnexpress, Dan Tri and Tuoi Tre. However, there are large differences by region. Dan Tri is favoured in the North, but not the South. VNExpress is favoured amongst the two big cities (Hanoi and HCMC) but less in smaller cities. Tuoi Tre is the preferred news site in the South, but not in the North.

Fig. 37. Favourite websites for information gathering

Research (school /office)		News	
Google	50%	Vnexpress.net	16%
Vnexpress.net	2%	Dantri.com.vn	15%
Tailieu.com	2%	Tuoitre.com.vn	8%
Search			
Google	89%		

Source: Cimigo NetCitizens (percentages based on users of each activity)

### 4.3.2. Online entertainment

In 2010 Zing continues leading almost all entertainment activities on the internet. Zing is the most preferred website for listening to / downloading music and gaming. Zing is overtaken by Youtube for watching and downloading movies.

Besides Zing, there are some other favourite websites in specific areas. Nhaccuatui, Nhacso and Nhacvui continue being liked for online music. For application gaming, vtc websites are the popular channels behind Zing.

Fig. 38. Favourite websites for online entertainment

Watching movies		Downloading movies		Listening to music	
Youtube	14%	Youtube	11%	Zing	49%
Zing	7%	Zing	8%	Nhaccuatui	17%
Xuongphim	5%	Krfilm.net	4%	Nhacso.net	6%
Downloading music		Web gaming		Application gaming	
Zing	55%	Zing	29%	Zing	29%
Nhaccuatui	18%	Trochoiviet.com	11%	Vtc.com.vn	6%
Nhac.vui.vn	4%	Facebook	8%	Au.vtc.com	5%

Source: Cimigo NetCitizens (percentages based on users of each activity)

### 4.3.3. Online communication

Yahoo is the most preferred provider of online communication. The majority would name Yahoo as their favourite provider for e-mail and chatting. Yahoo's popularity is very strong throughout gender, age groups, economic class and geographical regions.

Next to Yahoo, a minority prefer Google for e-mail (22%). Facebook and Skype are also favoured for chatting by a small proportion of users.

Fig. 39. Favourite websites for online communication

E-mail		Chatting	
Yahoo	65%	Yahoo	85%
Gmail	22%	Facebook	3%
Zing	1%	Skype	2%

Source: Cimigo NetCitizens (percentages based on users of each activity)

#### 4.3.4. Online business

Enbac.com becomes the most popular website for online shopping and auction. Besides enbac.com, 123mua.vn and 5giay.vn are still the top websites for online shopping. Enbac.com is strongly preferred in the North whilst 123mua.vn and 5giay.vn are used more frequently in the South.

Preferred providers of e-banking are Vietcombank, ACB and Techcombank.

Fig. 40. Favourite websites for online business

Online shopping		E-banking	
enbac.com	13%	Vietcombank.com.vn	23%
123mua.com	10%	Acb.com.vn	8%
5giay.com	8%	Techcombank.com	7%

Source: Cimigo NetCitizens (percentages based on users of each activity)

#### About Vietnam NetCitizens Report

Data in this report is based on a representative survey amongst nearly 3,400 internet users in 12 cities in Vietnam. The study is conducted by Cimigo and the report is available for free. If you are interested in a more detailed target group analysis, please contact us for a quotation.

Download this report for free: [www.cimigo.vn](http://www.cimigo.vn)  
Request your individual analysis: [contact@cimigo.vn](mailto:contact@cimigo.vn)

## 5. INTERNET ATTITUDES

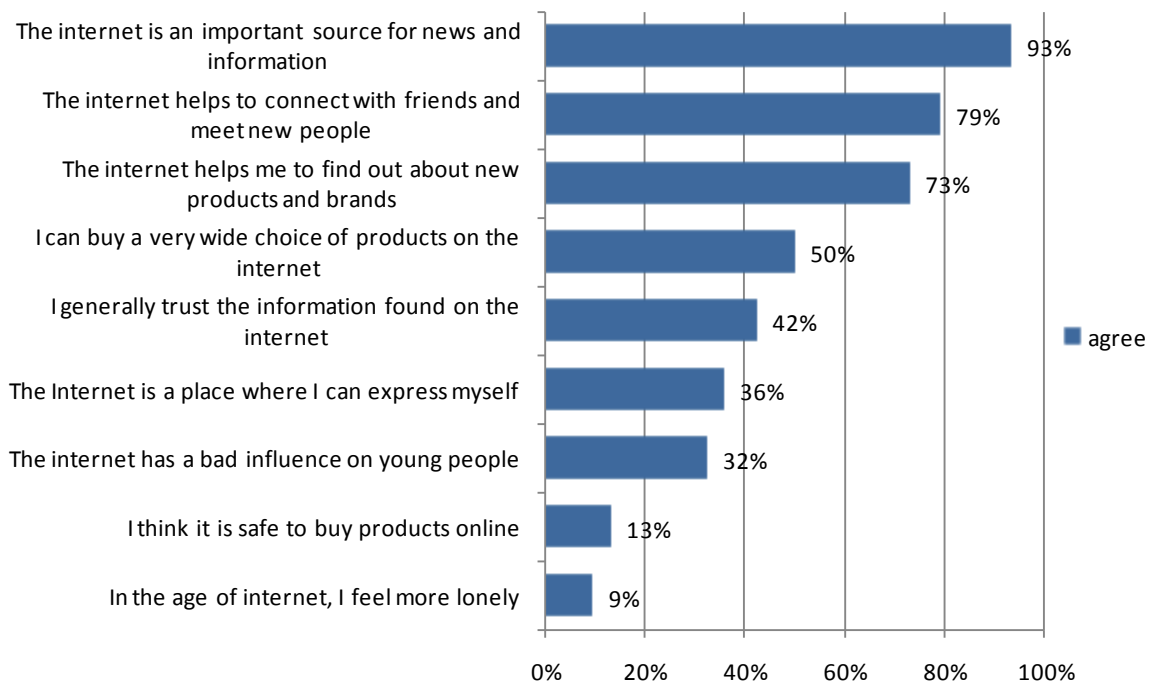
This chapter will investigate the perceptions that users have towards the internet. Attitudes are divided into the following areas: social connection, information gathering, negative effects, online buying and online advertising.

### 5.1. Overview

Information gathering and communication are the most important activities on the internet. Accordingly, the vast majority of internet users would strongly agree that 'the internet is an important source for news and information' and that 'the internet helps to connect with friends and meet new people'. More and more the internet is becoming a social space where people can generate their own content. For a third of respondents, the internet is a place where they can express themselves.

The internet also plays an increasingly important role for product selection and buying. Three quarters of internet users find out about new brands and products on the internet and about half of them think that they can buy a very wide choice of products online. However, trust in online payment is still low, as very few people think it is safe to buy products online.

Fig. 41. Overview of internet attitudes



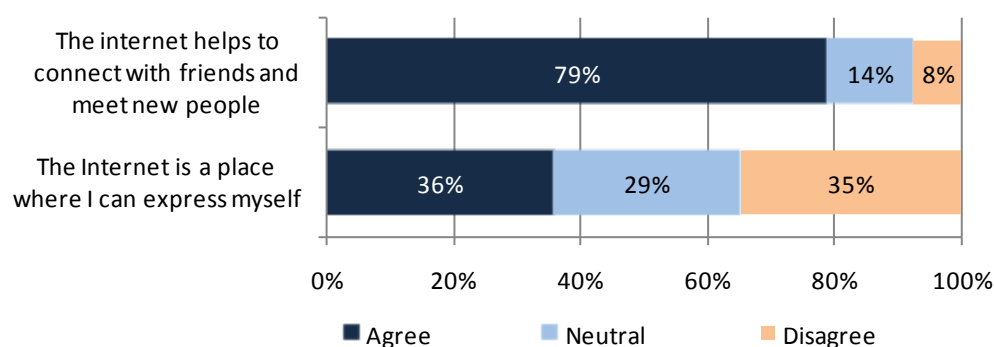
Source: Cimigo NetCitizens

## 5.2. Social connection

Establishing and maintaining connection with friends is a key area of the internet in Vietnam and chat, email, blogs and social networks are widely used. 80% of internet users think 'the internet plays an important role in connecting with friends and meeting new people'. Younger age groups agree to this statement more than older age groups.

For a third of internet users, the internet is a place where they can express themselves. Self-expression is more important for younger age groups (15-24 years).

Fig. 42. Attitudes towards social connection



Source: Cimigo NetCitizens

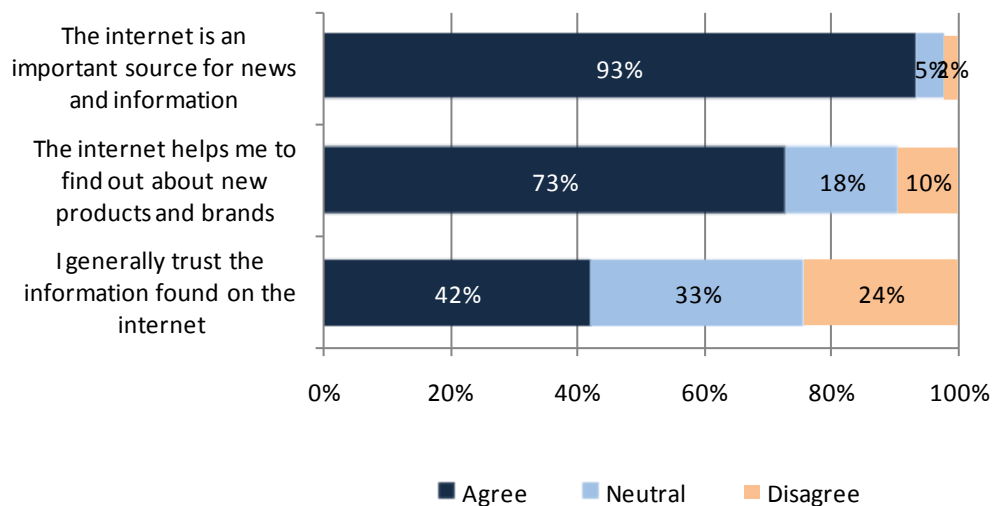
### 5.3. Information gathering

Using search and news sites are the most common activities on the internet. Accordingly, most internet users agree that the internet 'plays an important role as a source for news and information'. Agreement to this statement is higher amongst older age groups and users from higher economic classes.

Most users would agree that the 'internet is useful to find out about new products and brands'. Agreement is higher amongst males and users in the North.

However, the information found on the internet is not necessarily trustworthy. About a quarter says that they generally don't trust information found on the internet. Information in newspapers and on TV is generally seen as more trustworthy.

Fig. 43. Attitudes towards information gathering



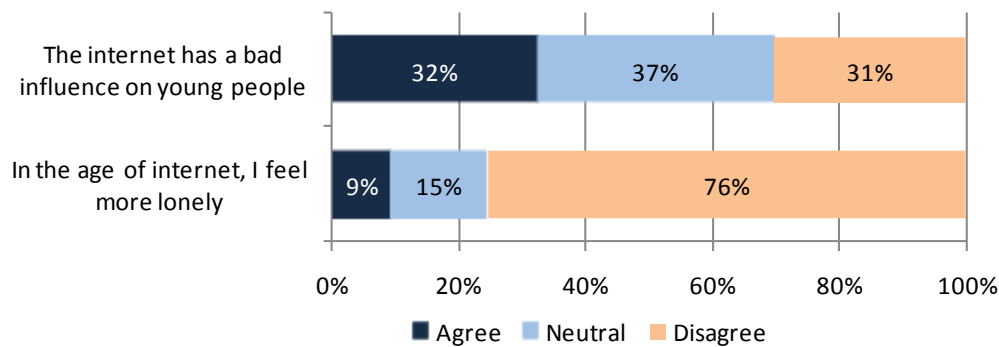
Source: Cimigo NetCitizens



## 5.4. Negative effects

There might be some negative effects of internet usage, for example an increasing social isolation or negative effects on young people who might not use the internet in an appropriate way. However, scepticism about the effects of the internet is not very strong in Vietnam. Very few people say they feel lonelier in the age of internet. Opinions about the negative effect on young people are mixed, with about a third that would agree, a third that is neutral and a third that would not agree to this.

Fig. 44. Attitudes towards trust

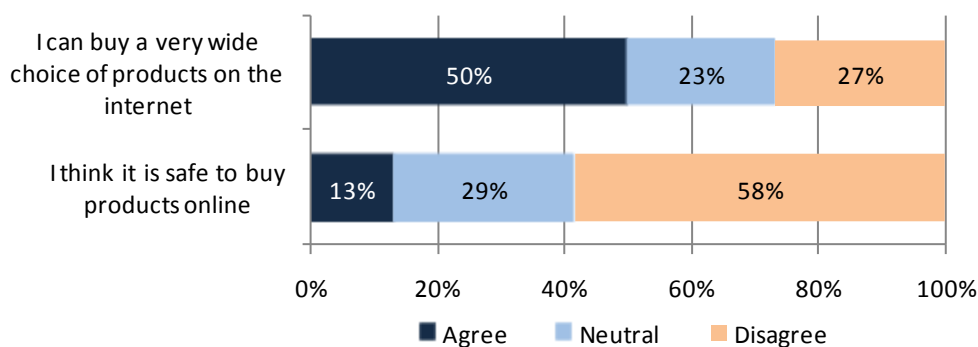


Source: Cimigo NetCitizens

## 5.5. Online buying

Buying products on the internet is not very common in Vietnam. Only a minority of internet users are using shopping and auction sites regularly. Most internet users would agree that they 'can buy a wide range of products on the internet'. However, only very few think it is 'safe to buy products online'. 60% do not trust in online payment systems.

Fig. 45. Attitudes towards online buying

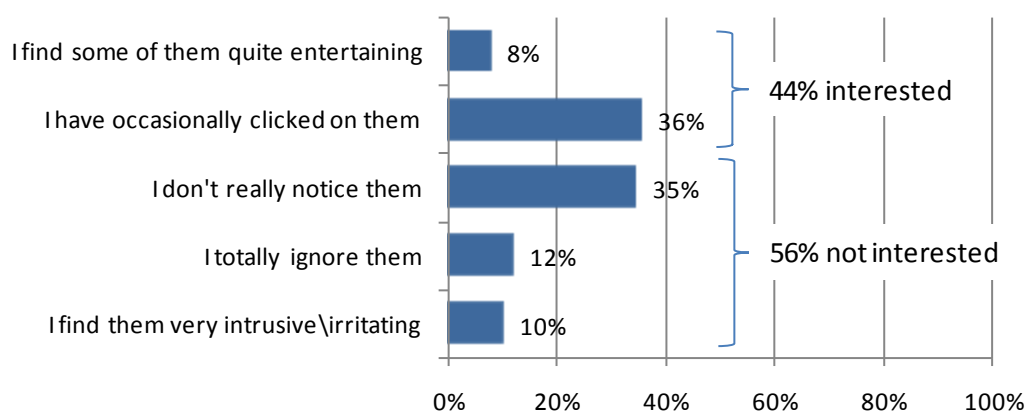


Source: Cimigo NetCitizens

## 5.6. Online advertising

The feelings towards online advertising are mixed. A small group of internet users find online ads very intrusive and irritating, but some find them quite entertaining. About half of users have a rather indifferent attitude towards online advertising, either ignoring or not noticing them at all. 36% sometimes click on an online ad that catches their attention. Young internet users have a more positive attitude towards online advertising and also tend to click more on ads that catch their interest.

Fig. 46. Attitudes towards online advertising

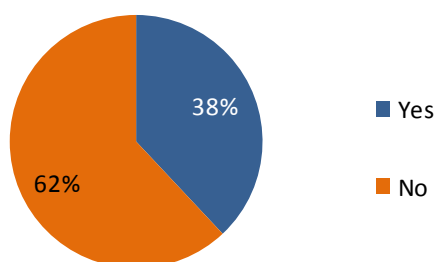


Source: Cimigo NetCitizens

## 6. MOBILE INTERNET

Using the internet on the mobile phone is a relatively new, but a strongly growing trend. Amongst all internet users, nearly 40% have already accessed the internet via their mobile phone or smart phone.

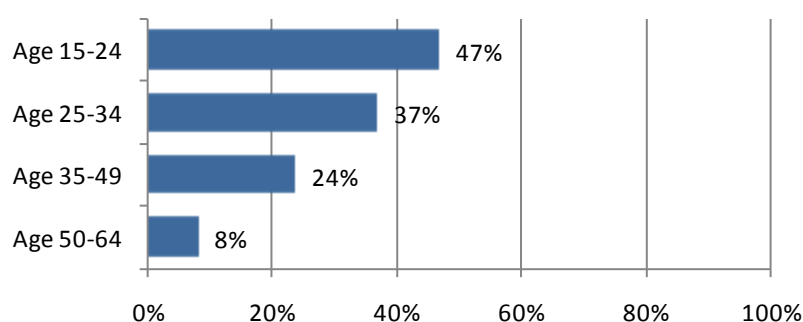
Fig. 47. Accessed internet on mobile phone



Source: Cimigo NetCitizens

Mobile phone internet access is mainly popular with younger age groups. People in the age 15-24 access the internet twice as often via mobile phone than people aged 35-49. Mobile internet access is higher in the North (mainly Hanoi / Hai Phong) compared to Central and the South.

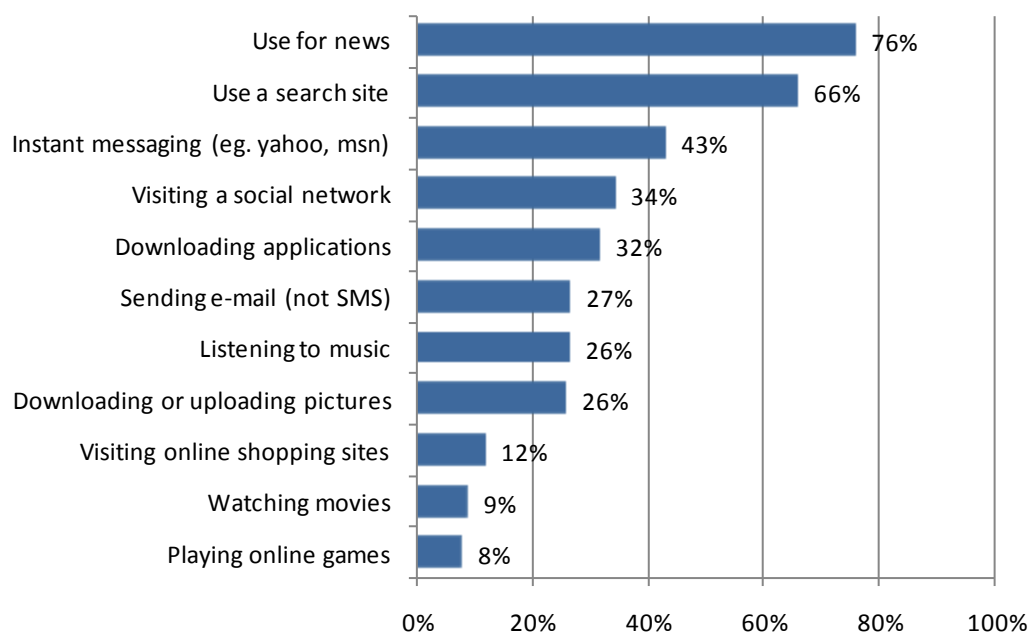
Fig. 48. Mobile internet access by age



Source: Cimigo NetCitizens

Online activities conducted from mobile access are largely similar to computer access. The most important are activities related to information gathering, such as reading the news and using search sites. Other popular activities are communication (such as instant messaging and sending e-mails) and social networking. Entertainment activities (listening to music, watching movies) and online shopping are less popular from a mobile phone.

Fig. 49. Activities conducted on mobile internet



Source: Cimigo NetCitizens (percentages based on people who access the internet on the mobile phone)

## 7. DEMOGRAPHIC DIFFERENCES

At various stages, this report identifies differences in internet usage between demographic groups; e.g. females/males, higher/lower economic classes, users from the North/South etc. This chapter will summarise the main differences.

### **Males vs. females**

- Internet penetration is higher amongst males. 60% of males in urban Vietnam have accessed the internet, whilst only 50% of females have.
- Men have been using the internet for a longer time. Nearly half of men have used the internet for 5 years or more, whilst for females it is only 35%. The share of females who have just used the internet for 1 year is higher.
- Males are using the internet 10-20 minutes longer on an average day. They also access the internet more frequently than females.
- Women are more interested in visiting and writing blogs than men, they also keep their own blog more often. Males on the other hand use the internet to download movies and to play games on online applications more often.

### **Old vs. young**

- The internet is clearly used by younger people more often. The age group of 15-24 year olds is very active online; the internet penetration in this age group is the highest; they access the internet most frequently, spend more time online and conduct more activities. Young people are accessing the internet via mobile phone most often.
- The main differences between old and young lies in activities related to social interaction and entertainment. Young people are far more active in chatting, blogging and social networking. They also use the internet to listen to music, watch movies or play games more often. There is no age-specific difference with regards to using internet as an information gathering medium (e.g. read news, search for information).

### **Hanoi vs. HCMC**

- In Hanoi, internet penetration is higher than in HCMC. Owing to a historically higher internet penetration, Hanoi users have been online for a longer time. The internet is used for about 10 minutes longer in Hanoi on an average working day (but not on the weekend).
- Users in Hanoi are accessing the internet from home more often and from internet cafes less often compared to HCMC. Access via mobile phone is also more frequent in Hanoi.
- Users in Hanoi are using the internet to read the news and visit online forums more often. Online auctions and shopping are more common in Hanoi compared to HCMC, mainly due to specific sites used in the North (e.g. enbac.com). On the other hand, people from Saigon use entertainment activities (listening and downloading music) and online chat more often.

### **High vs. low economic class**

- The internet is used by higher economic classes. Internet penetration in economic classes A and B is about three times as high as in economic classes D and E. Thus, the majority of internet users are currently from economic class A, B and C.
- Internet users from higher economic classes access the internet more frequently and spend more time online on an average day. The internet is typically accessed from home, whilst with lower economic classes' access from an internet café more often.
- Users from higher economic classes conduct more activities online. A high difference in usage can be observed for online shopping, sending e-mails, reading online news and participating in social networks, blogs and forums. On the other hand, there is no difference between economic classes with regards to online gaming, listening to music and watching movies.

# CIMIGO COMPANY PROFILE

Cimigo is an independent team of marketing and brand research specialists. Cimigo employs over 200 research specialists contributing to great brands and their effective communications.

Founded in Ho Chi Minh City, Vietnam in 2003 Cimigo then expanded across major cities in Vietnam and beyond. Within 12 months Cimigo opened offices in Ha Noi, Hai Phong, Da Nang, Can Tho and Nha Trang. In 2004 Cimigo developed operations in China and India. Today Cimigo operates across the Asia Pacific region from Japan to Cambodia.

Cimigo provides research based consulting. Cimigo advises four of the top five advertisers in Vietnam.

Cimigo regularly publishes reports that are publicly available in Vietnam. To see an overview of the latest studies, visit [www.cimigo.vn](http://www.cimigo.vn).

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### About Vietnam NetCitizens Report

Data in this report is based on a representative survey amongst nearly 3,400 internet users in 12 cities in Vietnam. The study is conducted by Cimigo and the report is available for free. If you are interested in a more detailed target group analysis, please contact us for a quotation.

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