



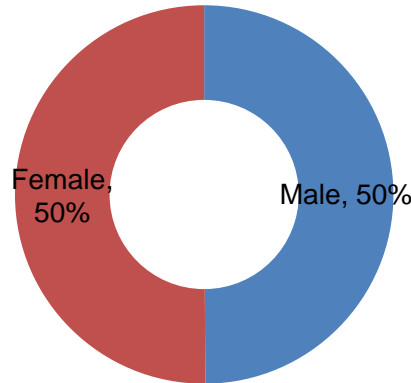
Q&Me is online market research provided by Asia Plus Inc.

## Vietnam EC market 2018

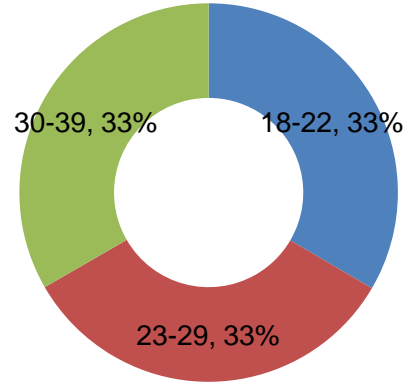
# Respondent profile (N=1050)

The survey is conducted to understand the online shopping lifestyle of urban population

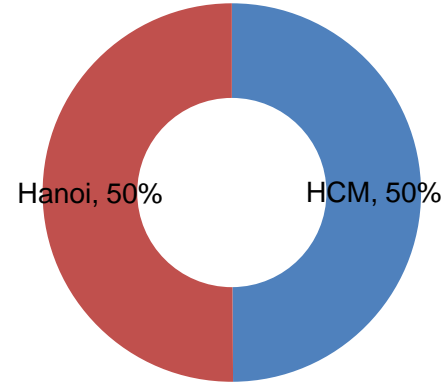
Gender



Age



City

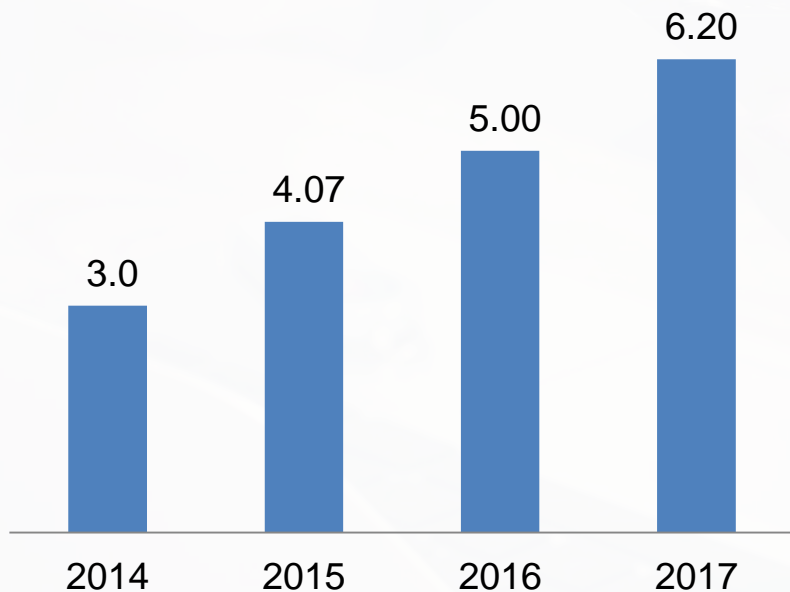


A high-angle, over-the-shoulder shot of a person with blonde hair tied back, sitting at a wooden desk. They are holding a black smartphone with both hands, looking at the screen. On the desk, there is a silver laptop, a white paper cup of coffee, a blue pen, and several notebooks. One notebook has a colorful striped cover, and another is open with handwritten notes. The scene is brightly lit, suggesting a professional or academic setting.

# Vietnam EC Market Highlight

# Market still has room to grow

Vietnam E-commerce market  
(in billion USD)



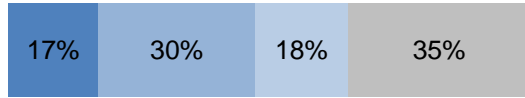
2020: **10B USD**



2018: 6.2B USD

# Highlight – Online shopper behaviors

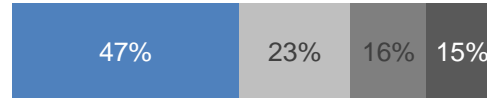
## Online shopping frequency



- Weekly and more
- Once - A few times / month
- Once / several months
- Never / Rarely

17% shop weekly, 30% buy monthly.

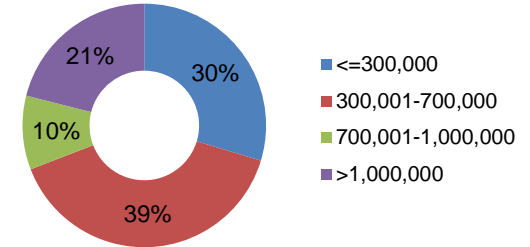
## Popular devices



- Smartphone (app)
- Home PC
- Smartphone (browser)
- Others

Mobile app account for 47%

## Monthly spending



Nearly 70% spend less than 700K

## Popular shopped categories



Fashion  
78%



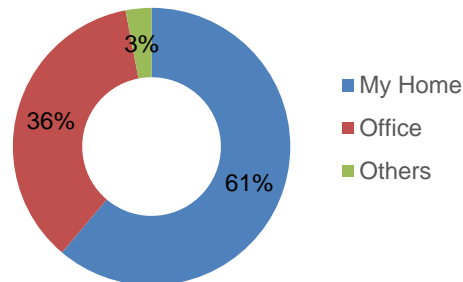
IT  
50%



Cosmetics  
44%

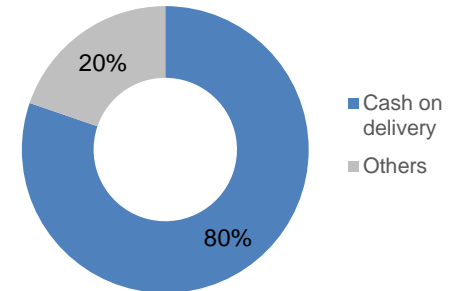
Fashion, IT, Cosmetics

## Delivery destination



1/3 are pickup at offices

## Payment methods

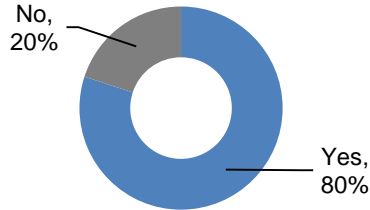


COD is still dominant method.



# Highlight – Online shopping motivations & satisfactions

## Online shopping usage



80% have shopped online.

## Reasons to shop online

Order anytime (63%)

Product variety  
(59%)

Mobile phone friendliness  
(58%)

Top 3 reasons to shop: **order anytime**,  
**product variety**, **phone friendliness**.

## Reasons not to shop online

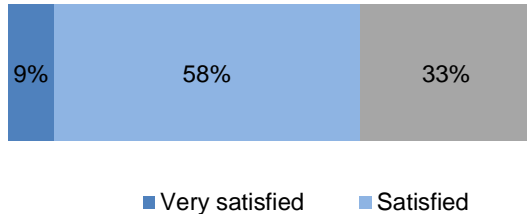
Quality concerns  
(50%)

Real shop preference  
(28%)

Security concerns  
(25%)

Biggest barrier to EC, **quality concern**,  
is unsolved throughout 2017-2018

## Customer satisfaction



67% are satisfied with online experiences

## Top 3 reasons for satisfaction

Product variety  
(67%)

Price  
(63%)

Promotions  
(53%)

Top 3 reasons for satisfaction: **product variety**, **price**, **promotions**.

## Top 3 reasons for dissatisfaction

Product quality  
(66%)

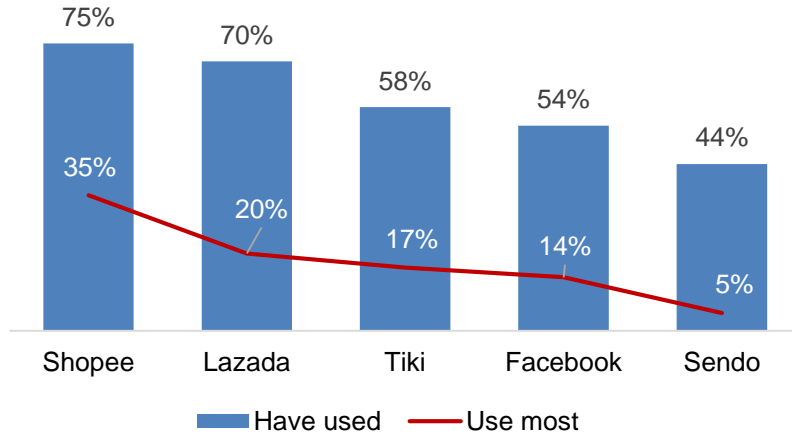
Delivery cost  
(38%)

Customer support  
(31%)

Dissatisfaction in product quality & customer support rose by 50% and 100% respectively.

# Highlight – Popular EC channels

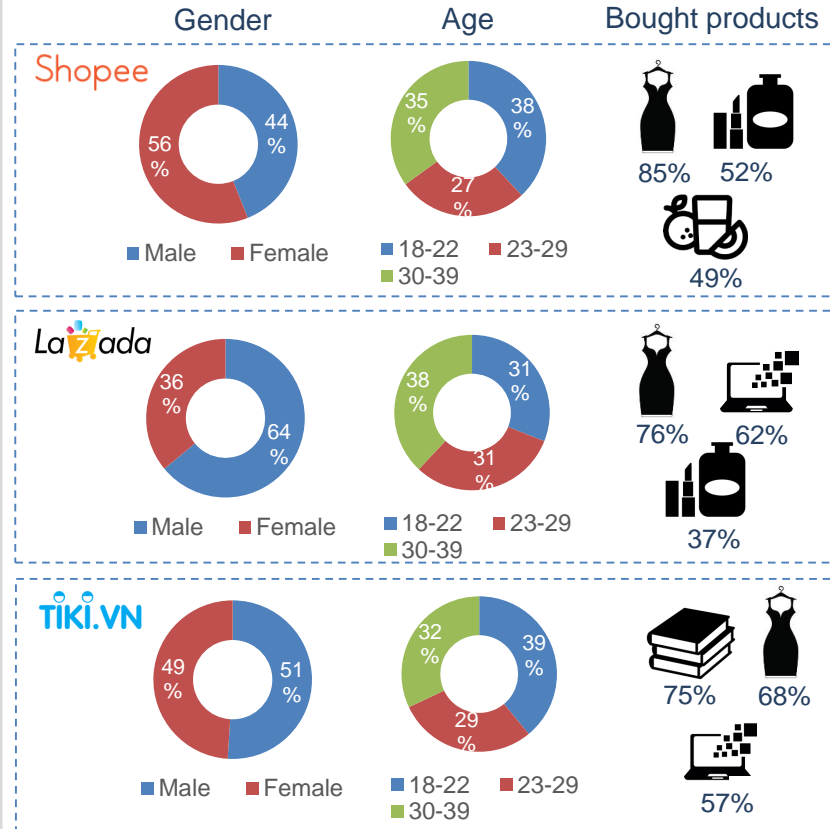
## Most popular EC sites



## Most recalled online store by category



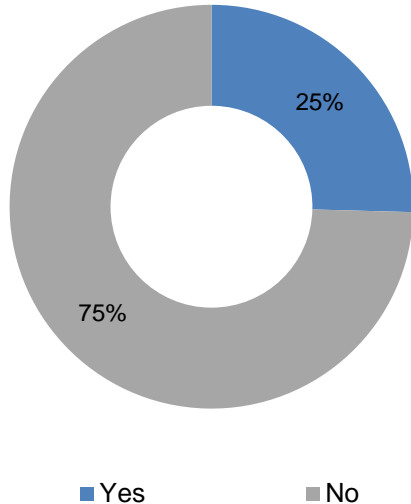
## Customer profile of major EC sites



# Highlight – Online selling

## Online selling

25% sell online some kind of products before.



## Popular online sold products

Popular sold categories: fashion, cosmetics, food and beverages.



Fashion  
39%



Cosmetics  
28%



Food, beverages  
25%



IT  
22%



Kitchen appliances  
15%

## Popular EC sites for selling online

Facebook is the most used platform to sell, used by 66%.

No.1



66%

No.2



49%

No.3



26%

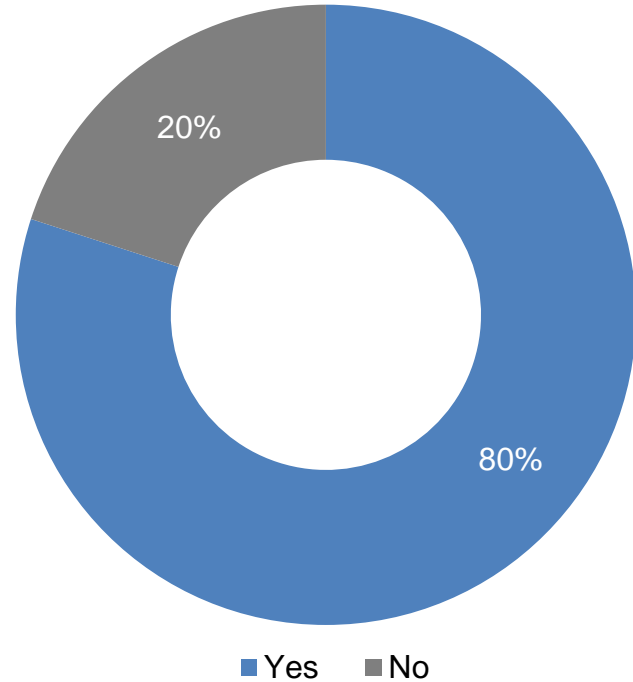


A close-up photograph of a person's hands typing on a laptop keyboard. The laptop screen displays a webpage with a profile picture and a bar chart. A semi-transparent blue banner is overlaid across the middle of the image, containing the text "Consumer behaviors in online shopping".

# Consumer behaviors in online shopping



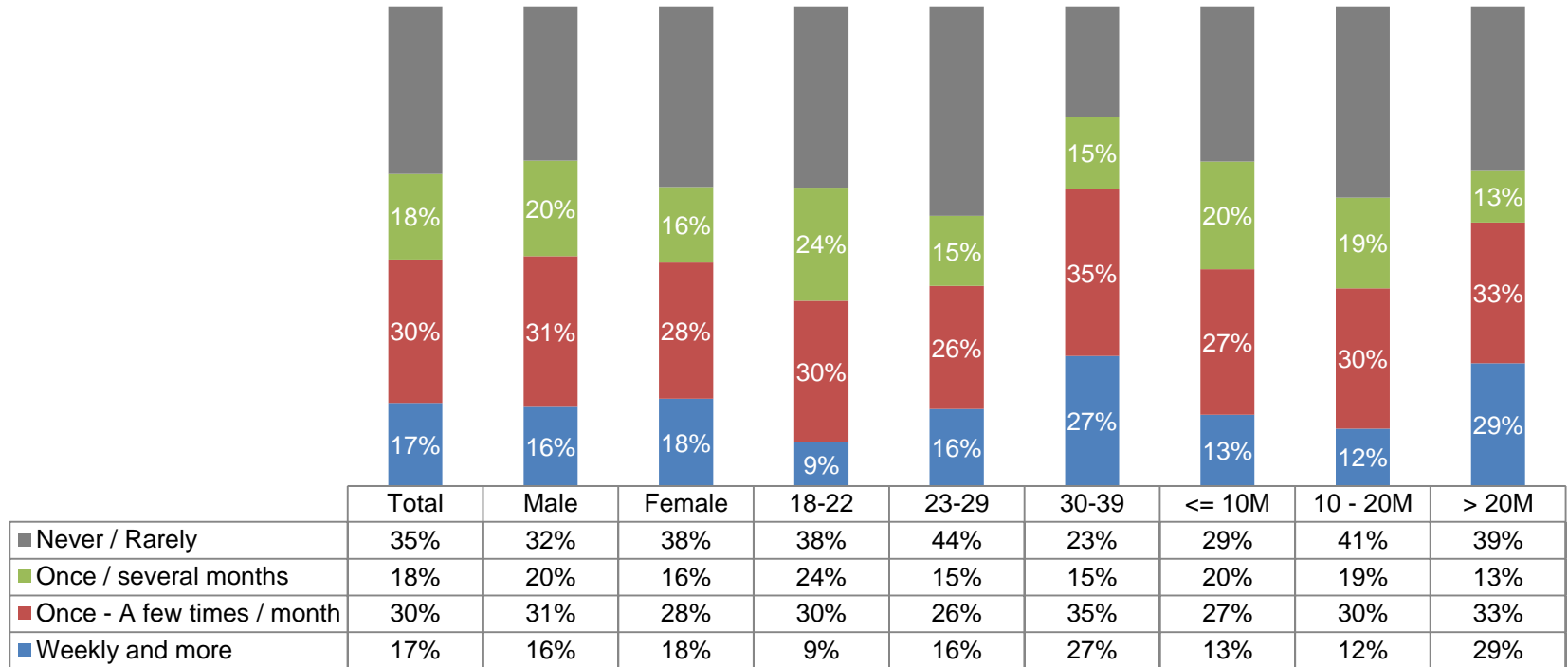
## Online shopping usage



80% said to have shopped online before.

Q. How often do you use online shopping? (including facebook) (N=1050)

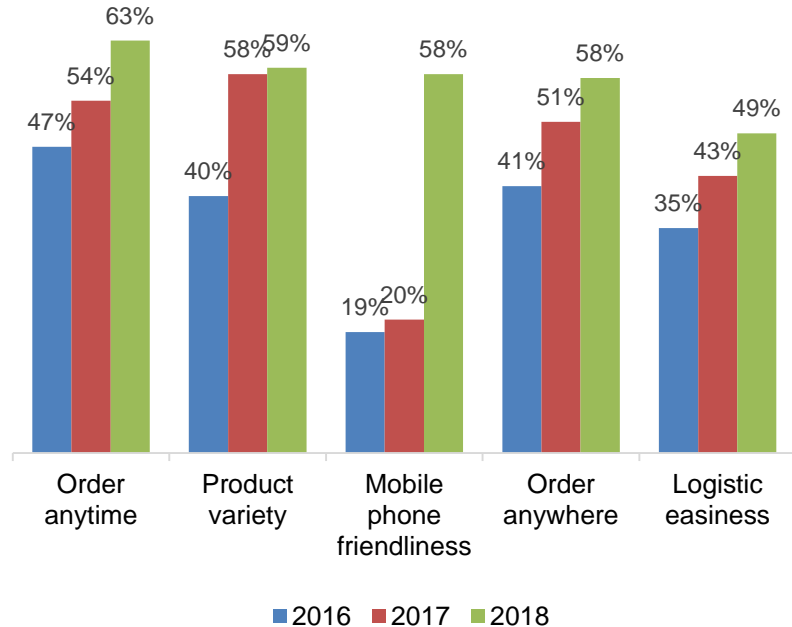
# Online shopping frequency



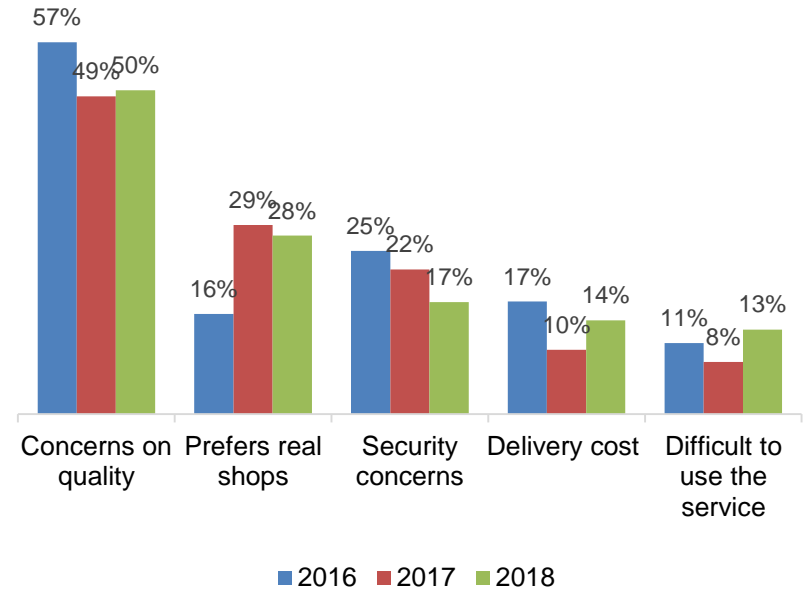
17% are frequent buyer. 30-39 year-olds and high-incomers shops online more.

# Why / Why not using online shopping

## Reasons to shop



## Reasons not to shop

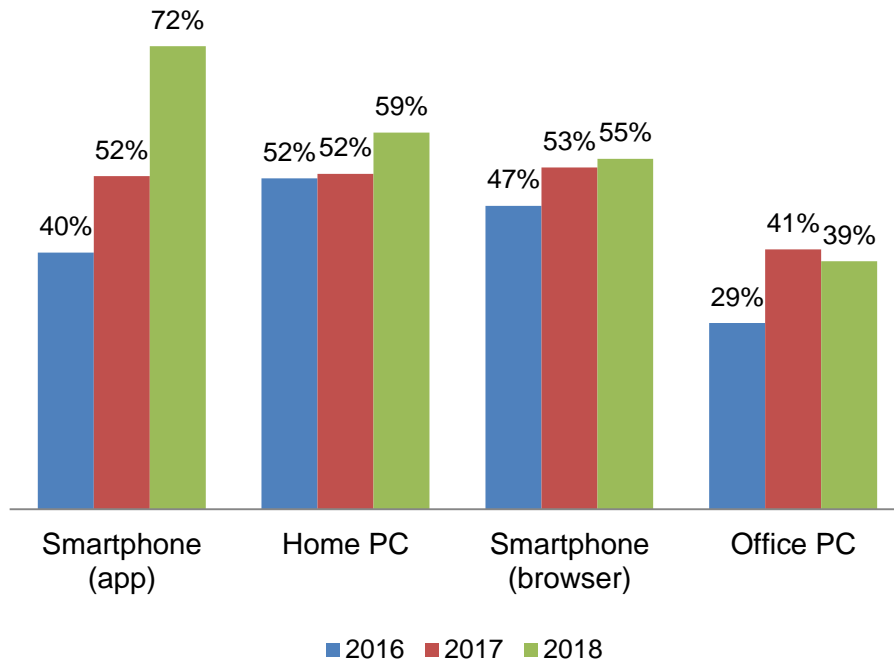


Mobile friendliness motivates a lot of people to shop online in 2018 compared to the previous years. No.1 reason not to shop is still quality concerns.

Q. What are the reasons that you use online shopping in general? (N=836)/ What are the reasons that you do not use online shopping? (N=234)



## Device to shop online

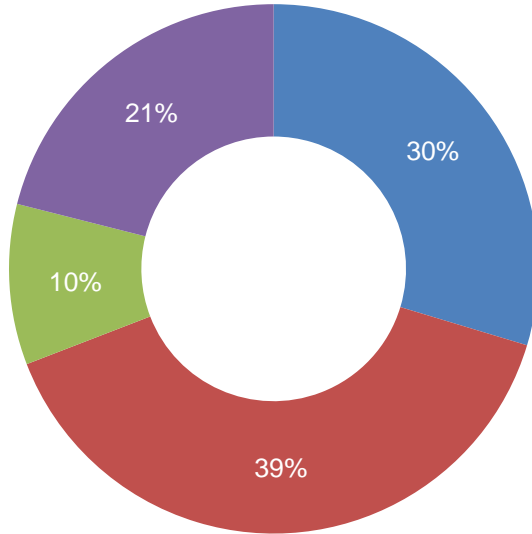


## Smartphone on the strong increase

Q. Which devices do you use for online shopping? (Please choose all the devices that you use) (N=836)

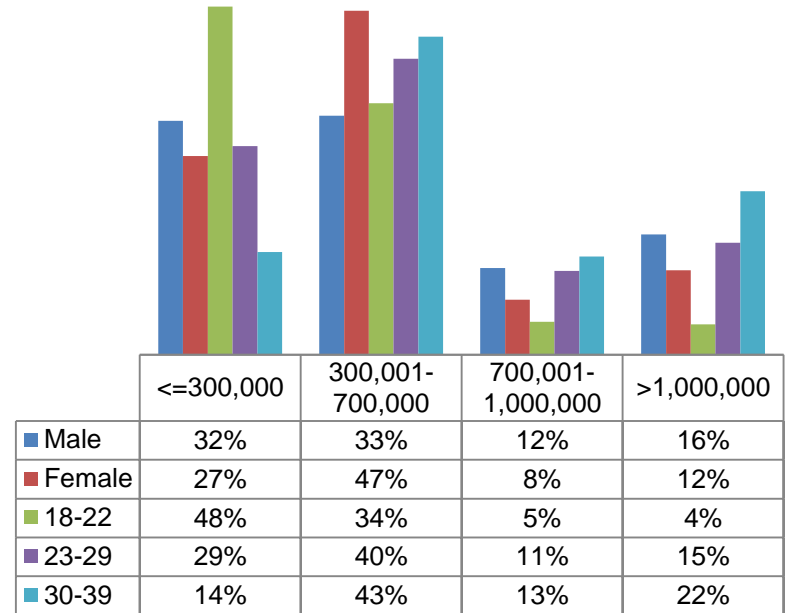
# Monthly spending for online shopping

Total



■ <=300,000 ■ 300,001-700,000 ■ 700,001-1,000,000 ■ >1,000,000

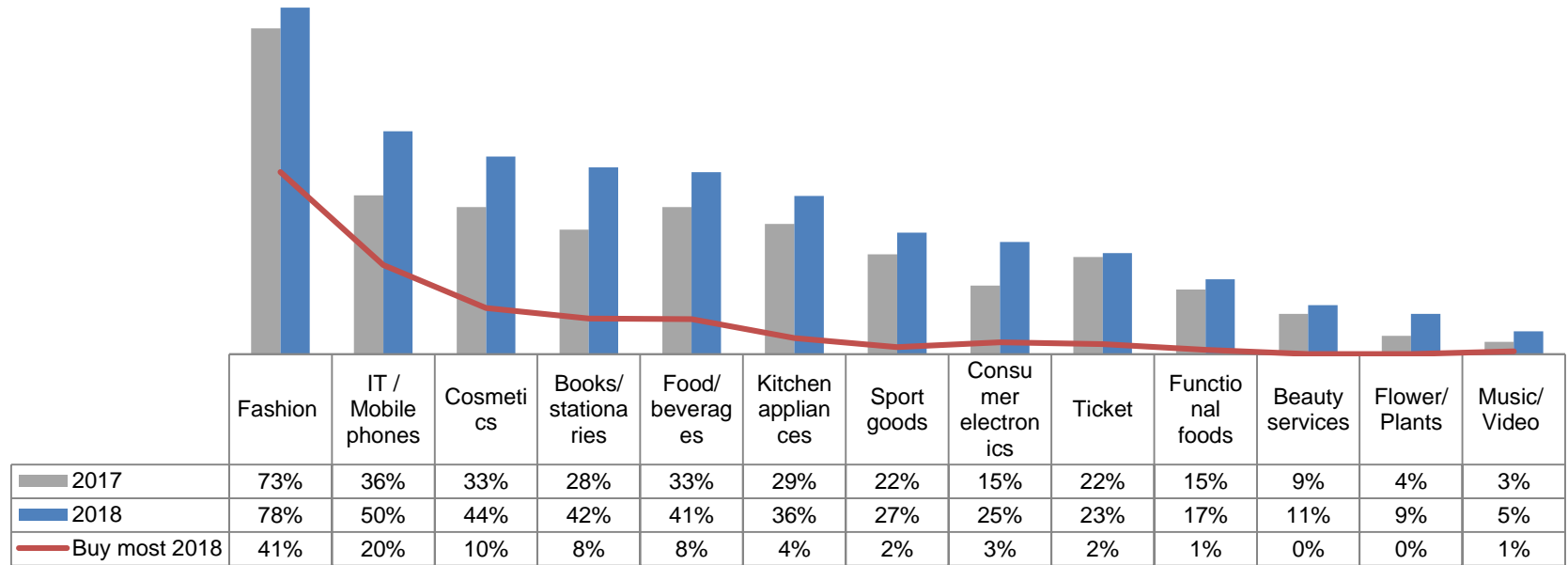
By profile



70% online shoppers spend 700,000 VND or lower per month. Heavy online spenders (spend >1M VND/month) are male and 30-39 years old.



# What to buy on online shopping



IT/Mobile phones, cosmetics and books & stationaries are on strong increase.

Q. Please choose ALL the products that you have bought online in the last 12 months (exclude food delivery service). (N=836);

Please choose the product that you buy online the most. (N=836)

# What to buy on online shopping by gender



88%



69%



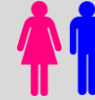
30%



68%



73%



19%



50%



35%



52%



31%



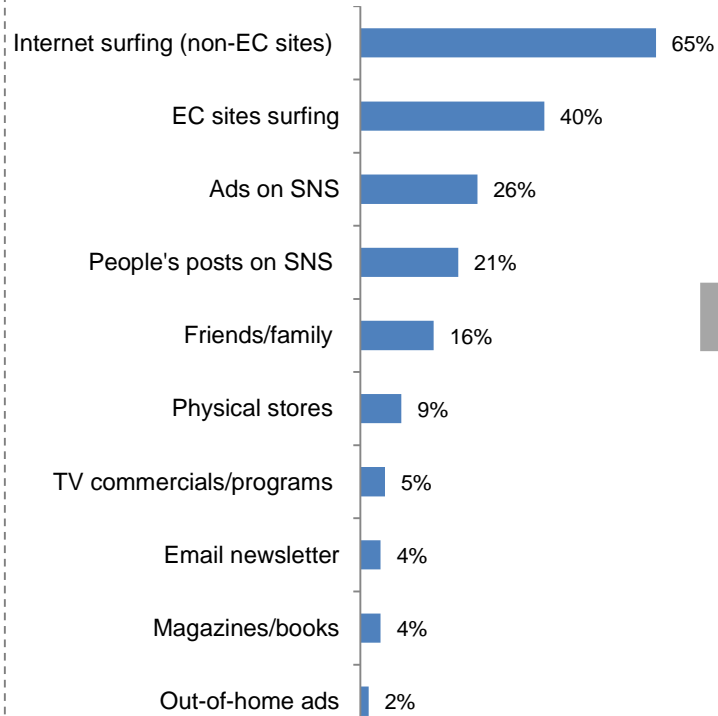
44%



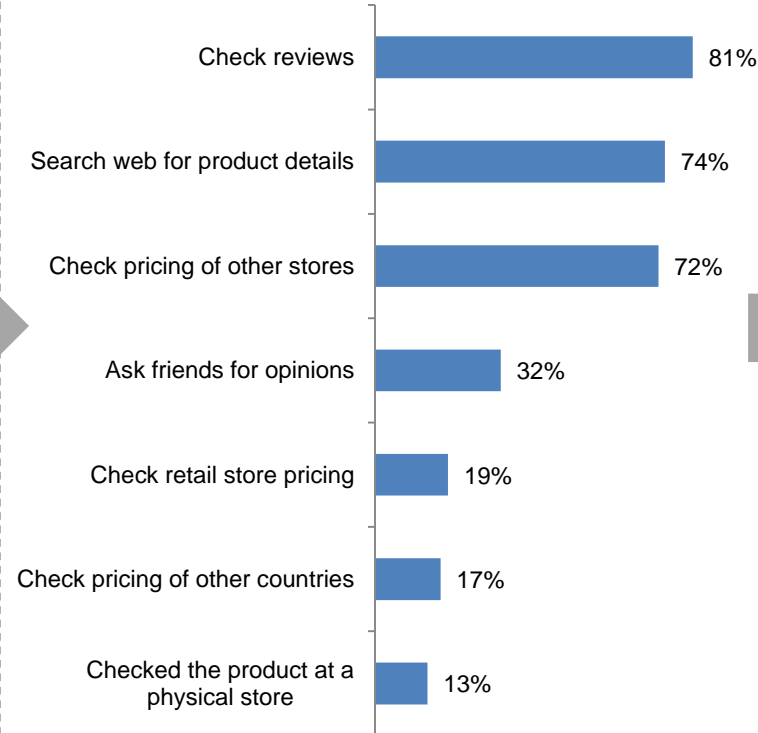
28%

# Purchase journey – Recognition, consideration, order

## Product recognition



## Consideration

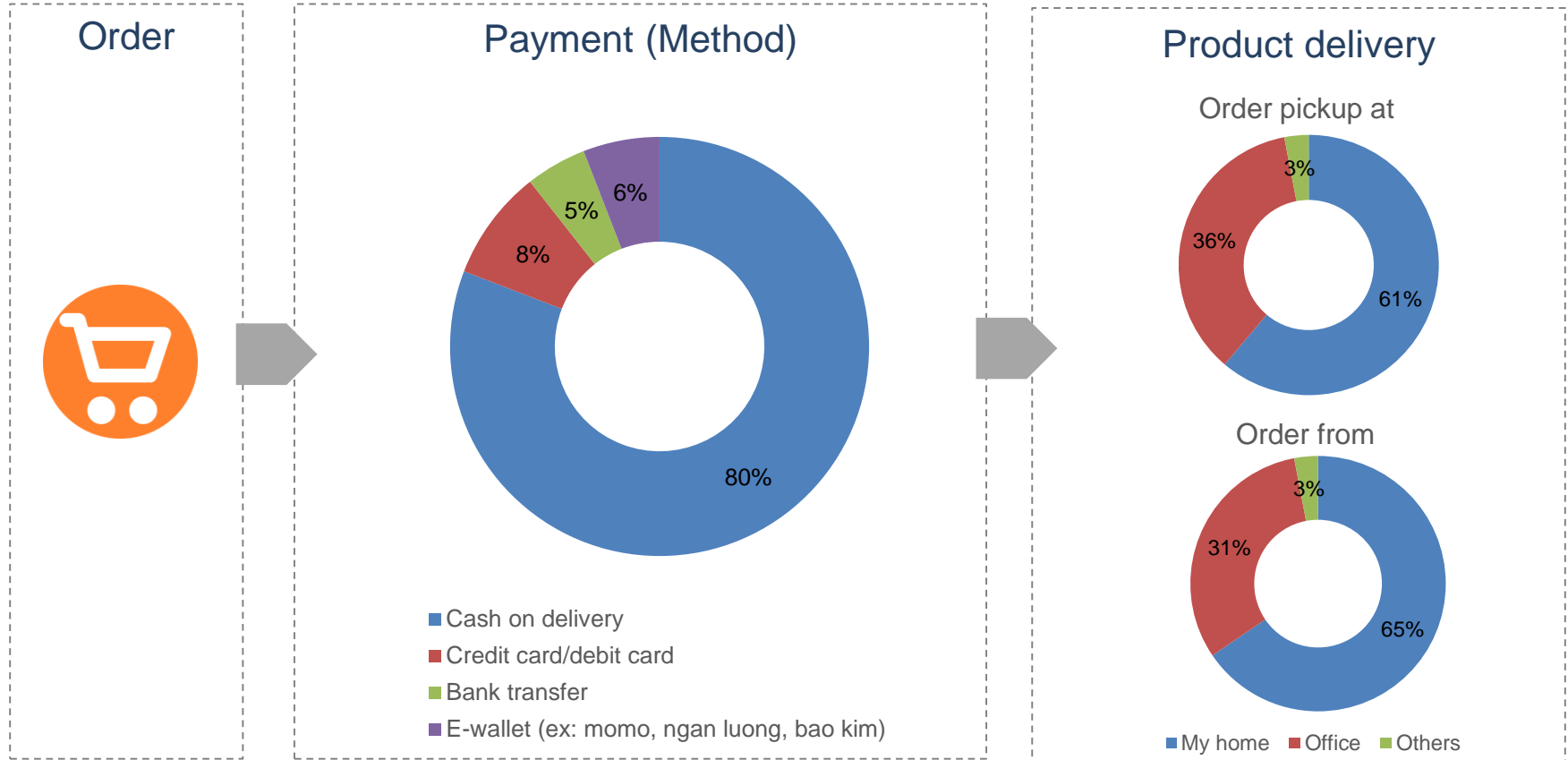


## Order



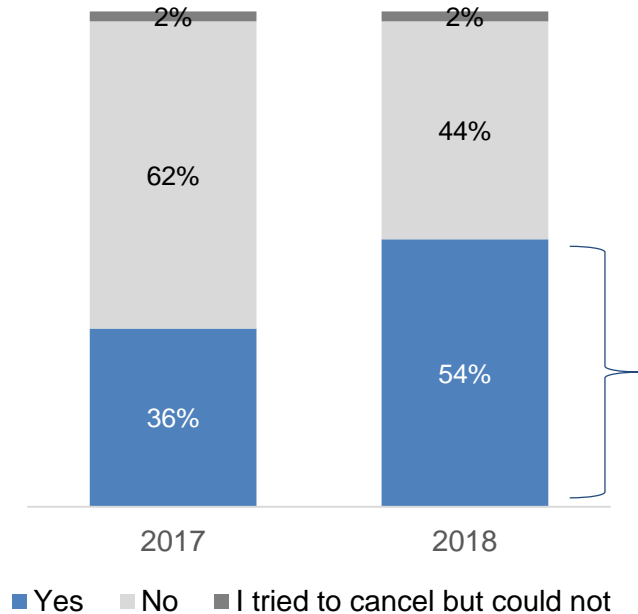
Q. What was the first reason for knowing the product you purchased?/ Please choose if you have taken any of the following actions before purchasing the product. (N=836)

# Purchase journey – Payment, receipt

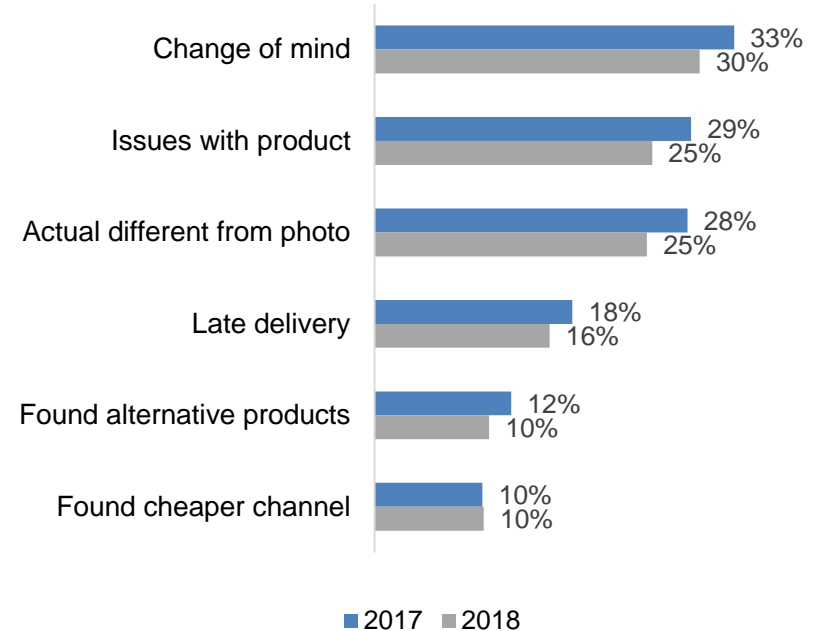


# Order Cancellation

## Cancellation experiences



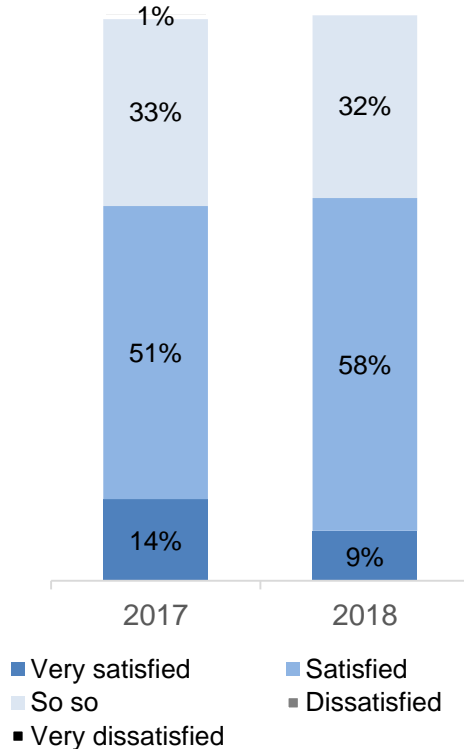
## Reasons for cancellation





Higher cancellation in 2018 could cause profitability issues for EC operators.

# Satisfaction / dissatisfaction in online shopping

Online shopping satisfactions



Satisfaction /dissatisfaction reasons

	'18	'17		'18	'17
Product variety	▲ 67%	60%	Product quality	▲ 66%	44%
Price	▲ 63%	62%	Delivery cost	▲ 38%	33%
Promotions	▲ 53%	45%	Customer support	▲ 31%	15%
Payment method	▲ 42%	37%	Delivery speed	▲ 23%	18%
Delivery speed	▼ 42%	45%	Cancel inflexibility	▲ 13%	9%

\*Positive changes are marked in green. The opposite is in red





# Online shopping improvement (vs. 1 year ago)



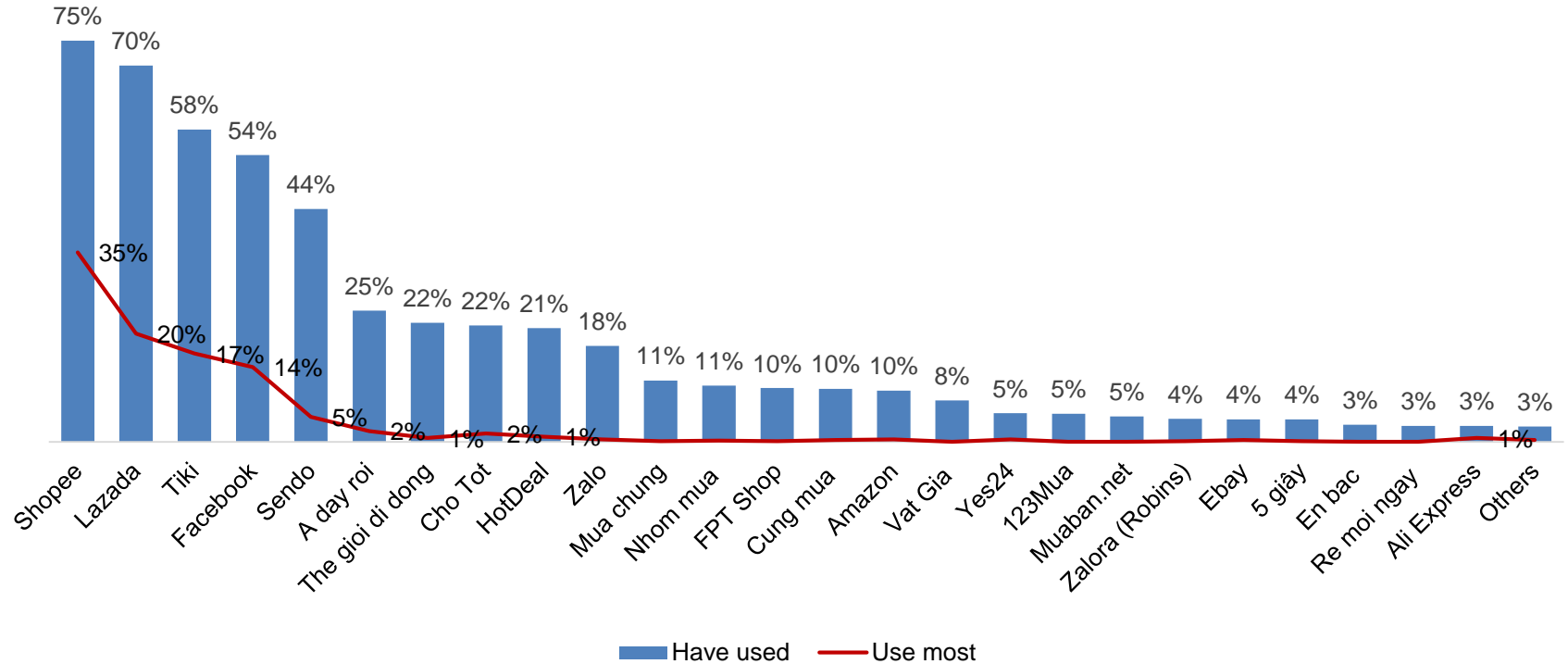
Product quality is improving the slowest while the easiness to find is increasing the most.

Q. Please choose what is applicable to you compared with a year ago, about online shopping? (N=643)

# Online channel characteristics



# Popular EC sites for shopping



Shopee, Lazada and Tiki are the 3 most popular EC sites. Facebook comes at 4<sup>th</sup>.

# Popular online shops by category

## Fashion

No.1

 **Shopee** (2017: No.2)  
All: 16% / M: 15% / F: 17%


No.2

 **Lazada** (2017: No.1)  
All: 15% / M: 18% / F: 12%

No.3

 **TIKI.VN** (2017: No.4)  
All: 7% / M: 7% / F: 7%


No.4


 **Sendo.vn** (2017: No.3)  
All: 5% / M: 6% / F: 4%

## Beauty care

 **Shopee** (2017: No.2)  
All: 12% / M: 13% / F: 11%

 **Lazada** (2017: No.1)  
All: 11% / M: 12% / F: 19%

 **TIKI.VN** (2017: No.3)  
All: 9% / M: 9% / F: 9%

 **Sendo.vn** (2017: No.6)  
All: 3% / M: 4% / F: 3%

## Food

 **Shopee** (2017: No.3)  
All: 10% / M: 9% / F: 12%

 **adayroi.com** (2017: No.2)  
All: 7% / M: 7% / F: 8%

 **TIKI.VN** (2017: No.4)  
All: 6% / M: 6% / F: 6%


 **Lazada** (2017: No.1)  
All: 5% / M: 6% / F: 5%

## IT / Electronics

 **thegioididong** (2017: No.2)  
All: 38% / M: 42% / F: 35%

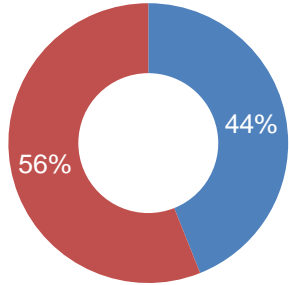
 **TIKI.VN** (2017: No.5)  
All: 19% / M: 16% / F: 21%

 **Lazada** (2017: No.1)  
All: 8% / M: 7% / F: 9%

 **FPT** (2017: No.3)  
All: 7% / M: 7% / F: 8%

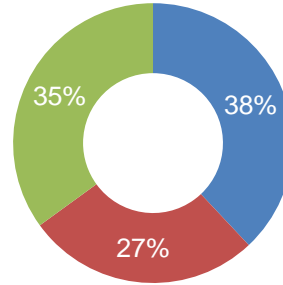
# Top brand diagnosis - Shopee

User gender



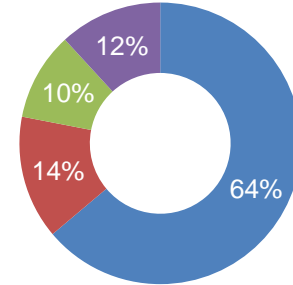
■ Male ■ Female

User age



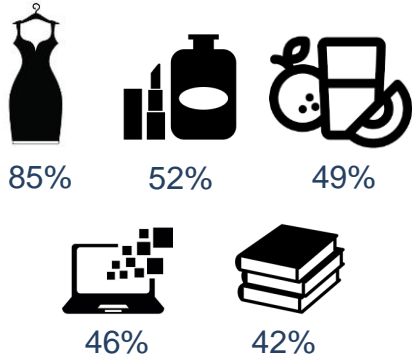
■ 18-22 ■ 23-29 ■ 30-39

Device to shop

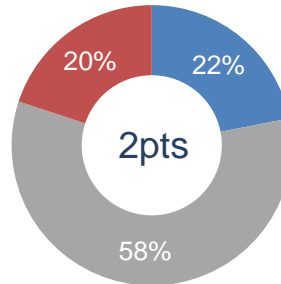


■ Smartphone (app) ■ Home PC  
■ Smartphone (browser) ■ Others

Popular products



Customer loyalty



■ Promoters ■ Passives ■ Detractors

Reasons to like the brand

Pricing (60%)

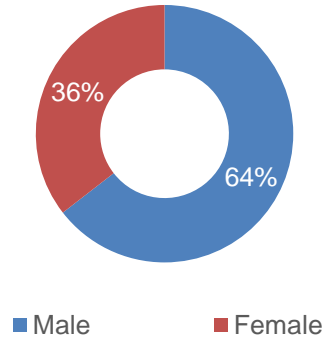
Delivery time (56%)

Product quality (53%)

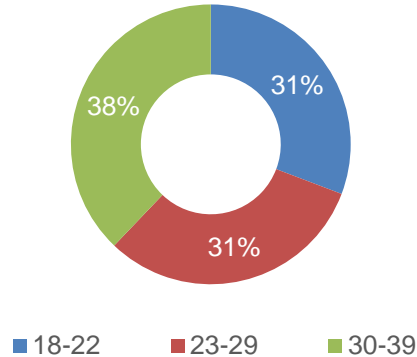
Payment method (46%)

# Top brand diagnosis - Lazada

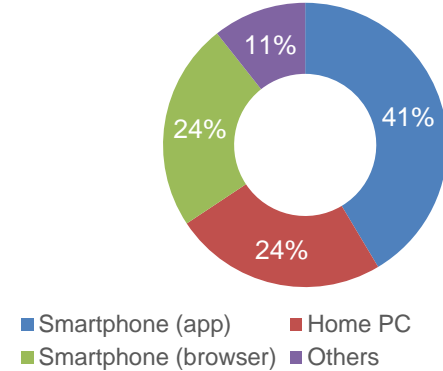
User gender



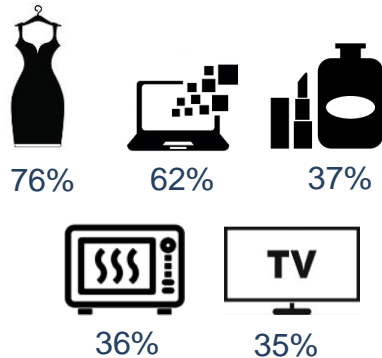
User age



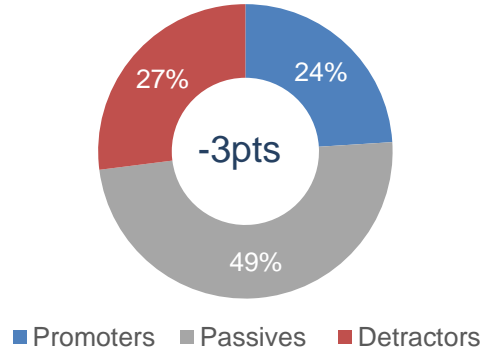
Device to shop



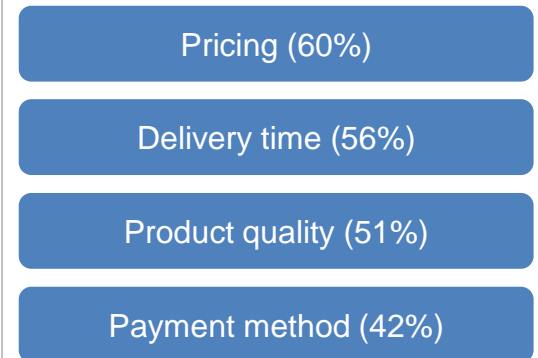
Popular products



Customer loyalty



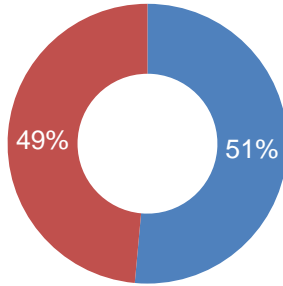
Reasons to like the brand





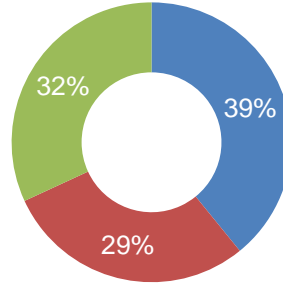
# Top brand diagnosis - Tiki

User gender



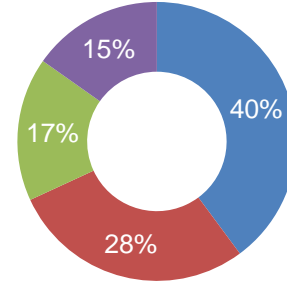
■ Male ■ Female

User age



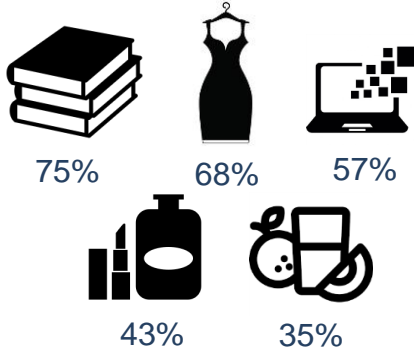
■ 18-22 ■ 23-29 ■ 30-39

Device to shop

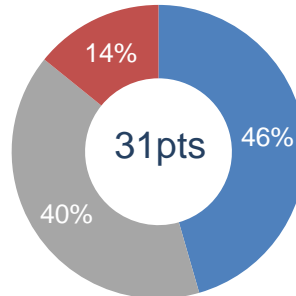


■ Smartphone (app) ■ Home PC  
■ Office PC ■ Others

Popular products



Customer loyalty



■ Promoters ■ Passives ■ Detractors

Reasons to like the brand

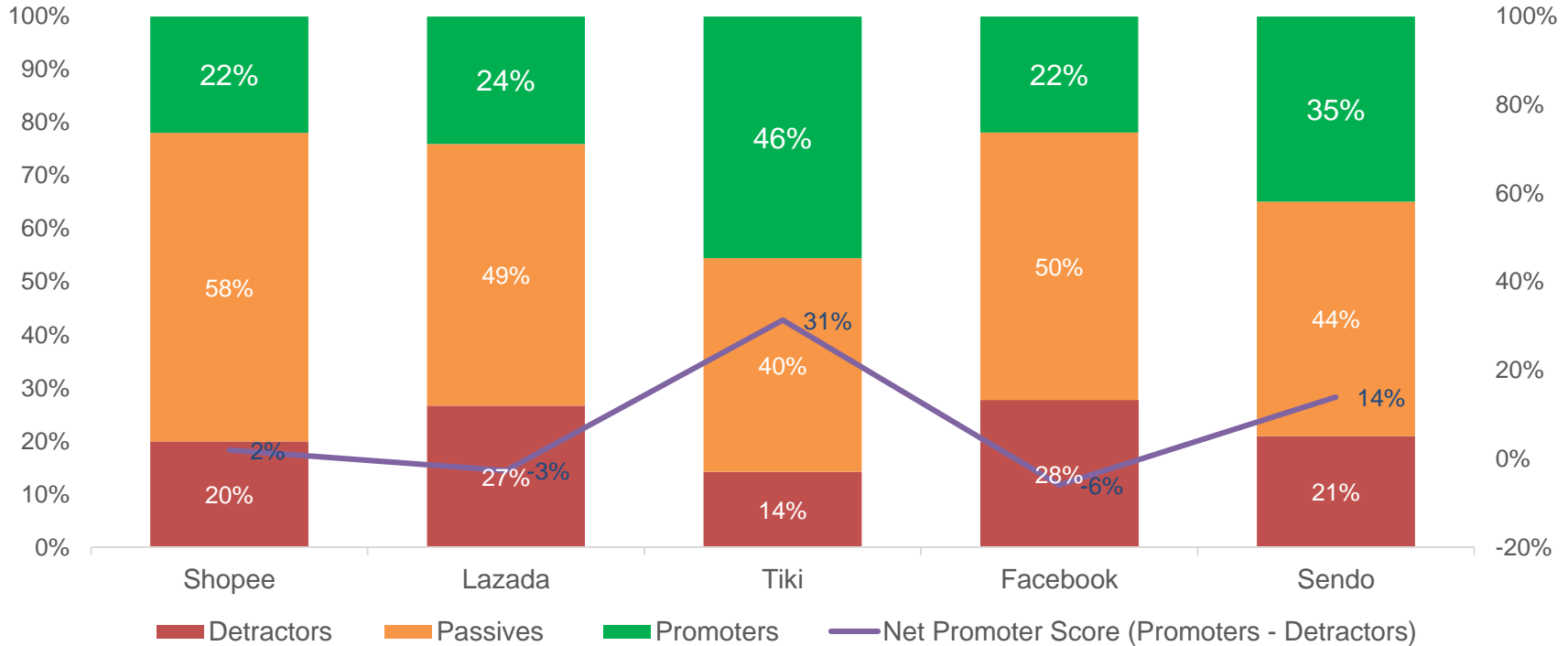
Delivery time (76%)

Product quality (71%)

Pricing (65%)

Payment method (51%)

# Customer loyalty for major online shopping site



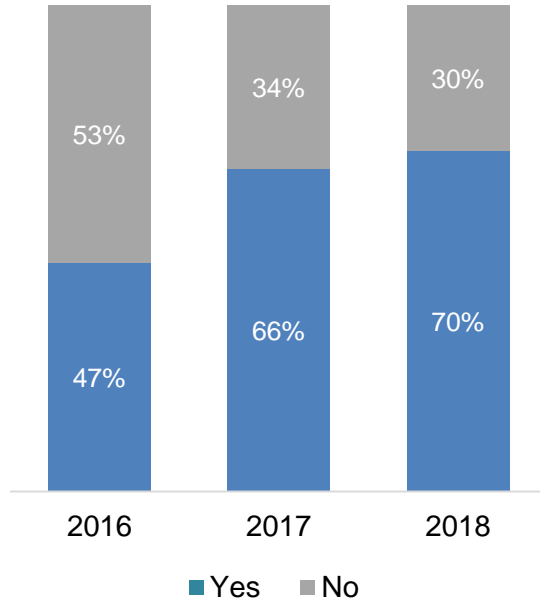
Tiki and Sendo have the most loyal customers. The remaining three, despite having many users, are very low in customer loyalty.



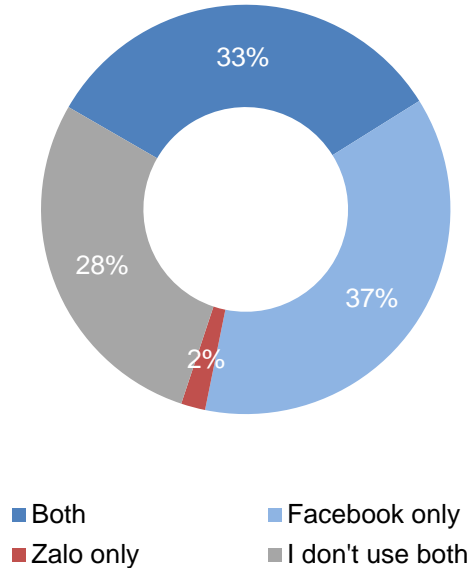
Increasing popularity of social commerce

# Usage rate of social commerce

## FB shopping users trend

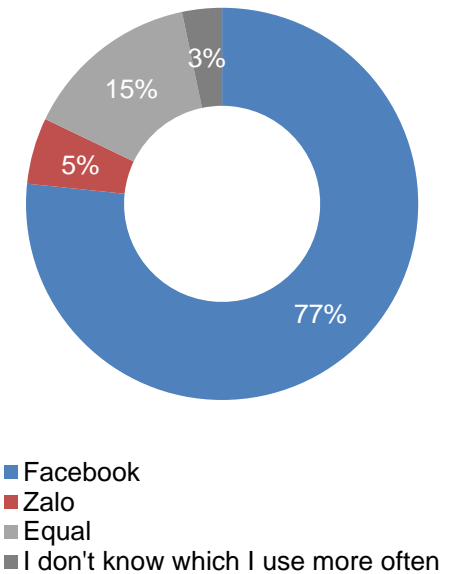


## Medias in use



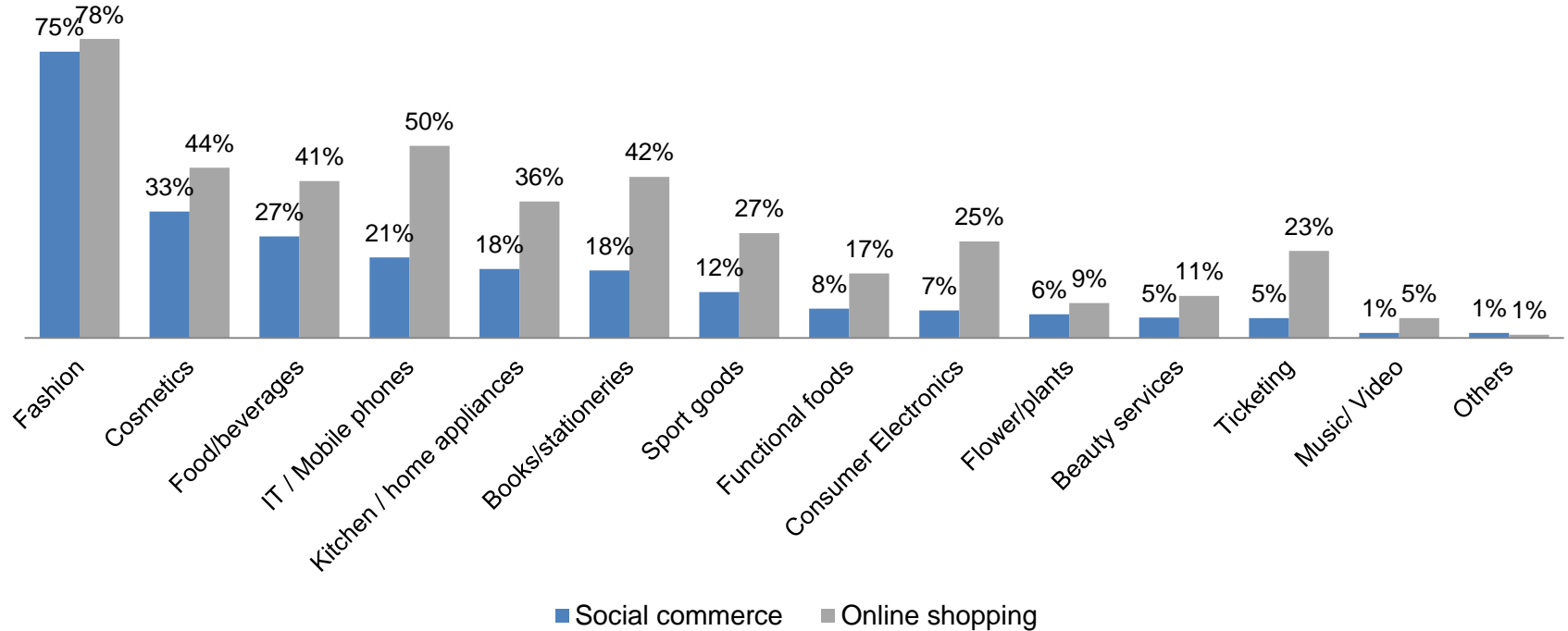
## Popular medias

\*Among people who use both for shopping



More than 70% have purchased online via social network. Facebook is used dominantly.

# What to buy on social commerce



Fashion is the dominant, followed by cosmetics. In general, people are more reserved when buying most product types on social media.

Q. What products have you ever bought via Facebook or Zalo? (N=600)

# Reasons to use social commerce



Easiness to order and pricing decreased significantly.



# Popular shopping pages on Facebook



1,404,272 likes  
(<https://goo.gl/gZ4eYP>)



1,349,379 likes  
(<https://goo.gl/7YCKsQ>)



1,330,300 likes  
(<https://bit.ly/2FBMnVX>)



1,178,815 likes  
(<http://bit.do/eBqtq>)



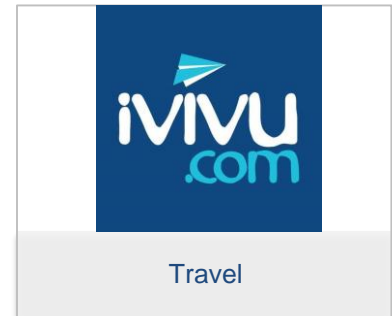
1,153,661 likes  
(<http://bit.do/eBqt9>)



1,152,602 likes  
(<http://bit.do/eBqtM>)



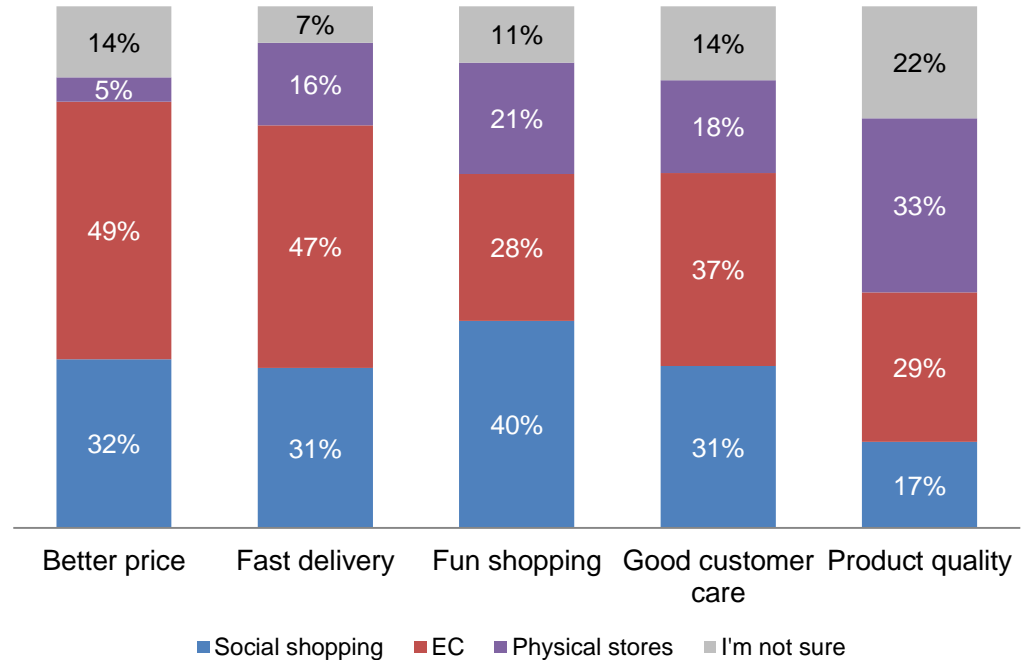
1,116,967 likes  
(<http://bit.do/eBqu9>)



1,053,462 likes  
(<http://bit.do/eBqwP>)



## Social shopping image differences



Social commerce – Fun shopping. EC – Better price, fast delivery. Physical stores – Product quality

Q. Which one do you think is more applicable to the following keyword? (N=600)



Selling via online

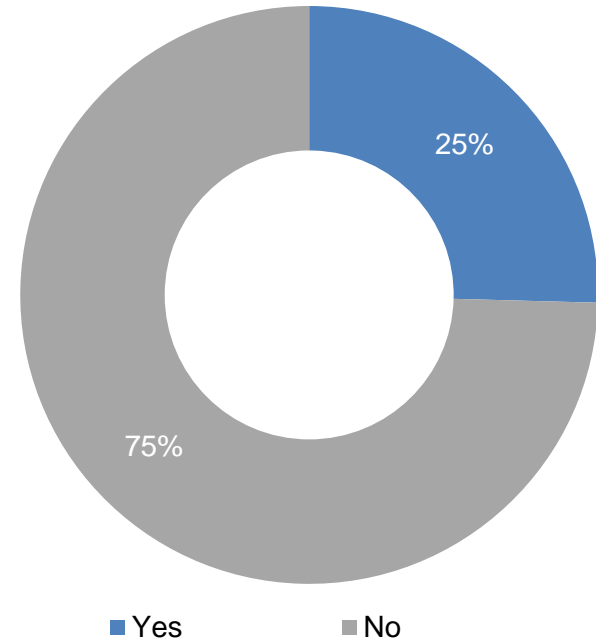
The image shows a hand holding a smartphone. The screen displays a financial analysis application. At the top, there is a search bar with a magnifying glass icon. Below it is a donut chart with the word 'ANALYSIS' in the center. The chart is divided into several segments of different colors (teal, blue, red, orange). Below the chart, there is a table with the following data:

UPDATE
+ 40.25 \$
- 05.75 \$

Below the table, there are several horizontal lines representing additional data or a list.



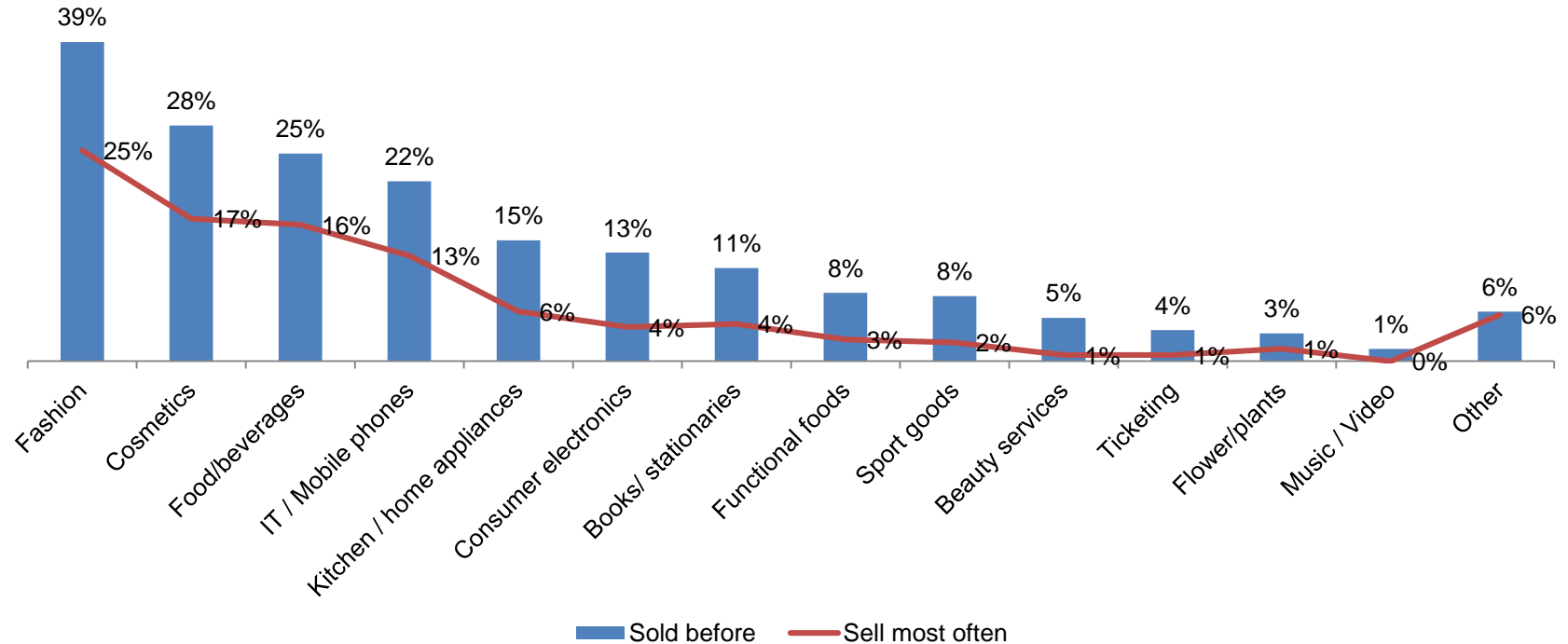
# Popularity of selling online



25% have sold products online.

Q. Do you sell any products online in the last 12 months? (N=1,050)

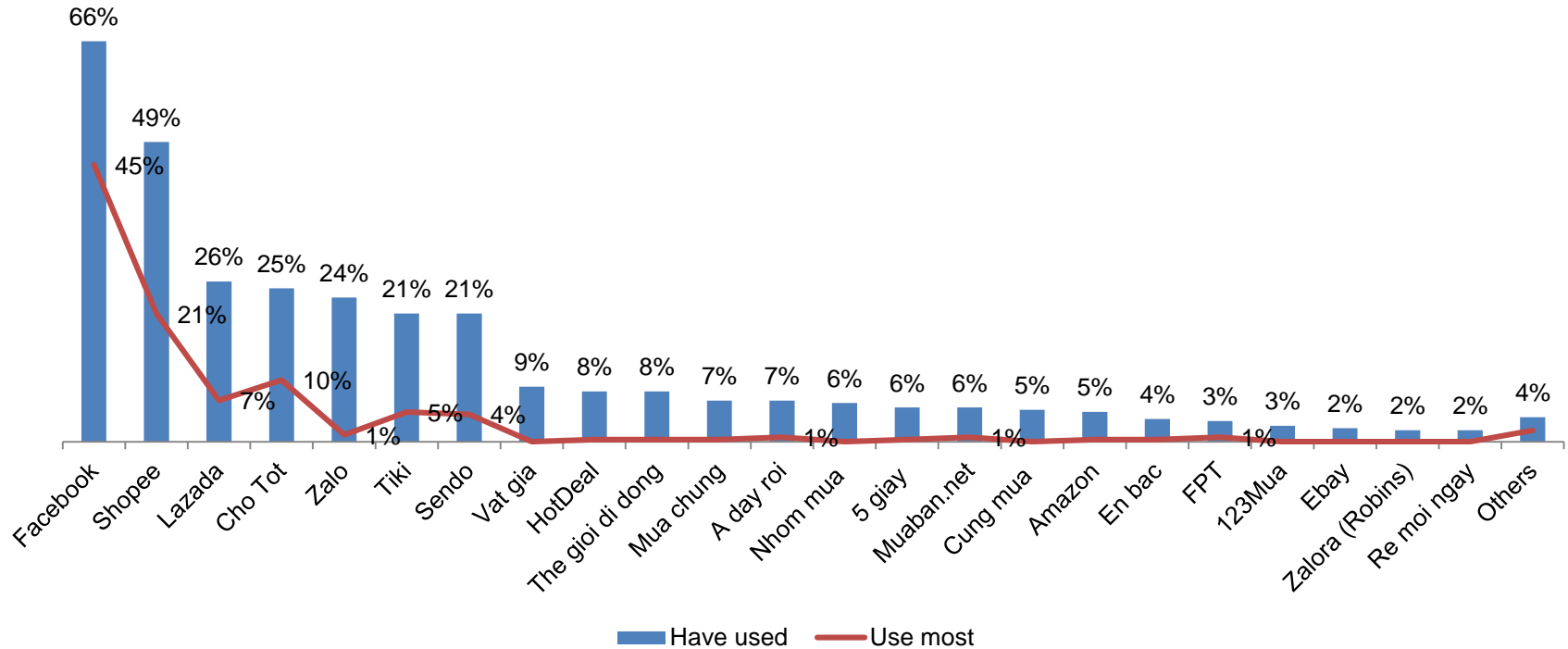
# Online selling usage



Popular products are fashion, cosmetics and food/beverages

Q. Please choose ALL the products that you have sold online/ sell most often in the last 12 months (N=267)

# Online EC sites for selling



Facebook is No.1 EC place for individuals to sell products. Shopee and Lazada follow.





## Q&Me – About Online Market Research Services

# Our research solutions

Provide the research services driven by the technologies

Admin platform

Plan, Manage and Analyze data



Consumer research app

Collect surveys from online consumers



Traditional market research

Effective retail audit or data collection

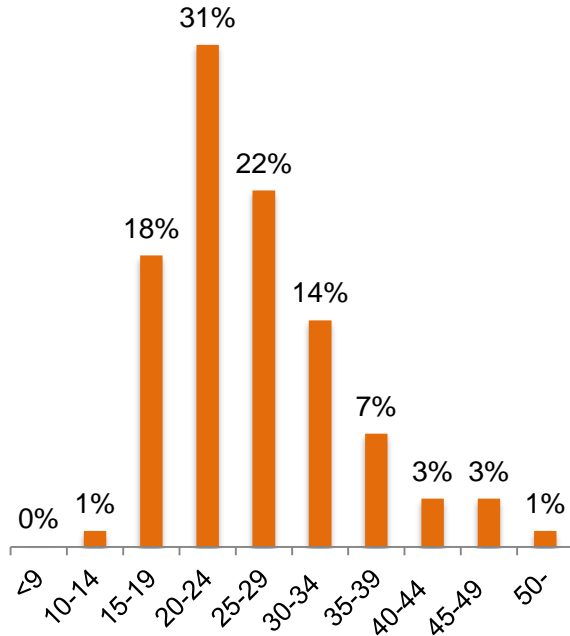




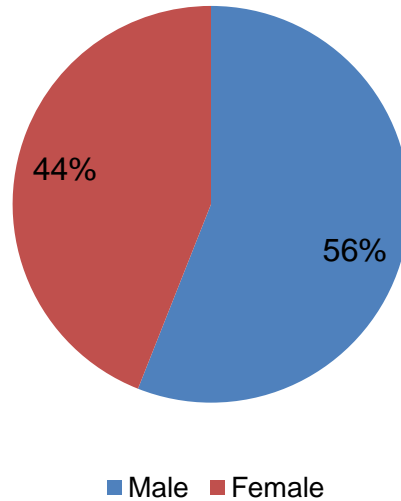
# Our advantage: Direct Panel Management

Our strength is **16-39 years old and urban areas**. This is where most biz customers would like to research. **400,000 members** as of Nov, 2018

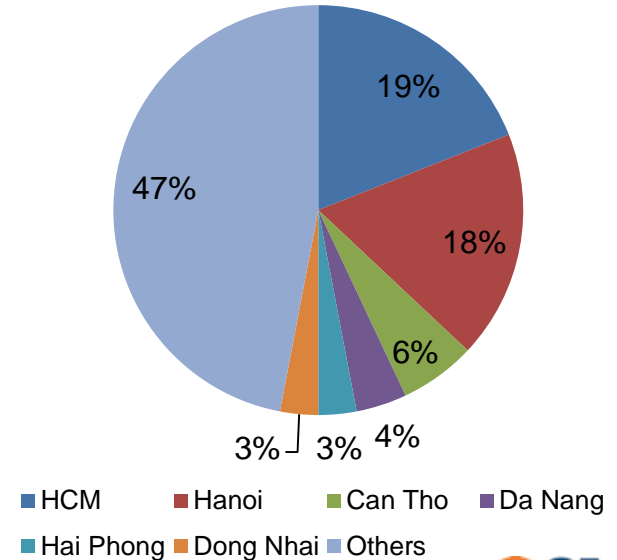
Age



Gender



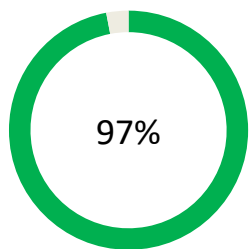
City



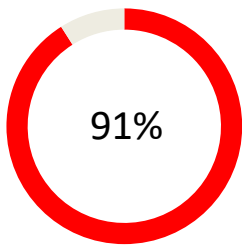
# Our advantage – Quick with quality

Online is considered to be “cheap and bad” in general. Q&Me provides several methods providing data with quality

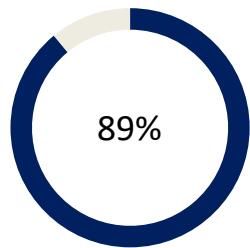
## Our quality score by SSI



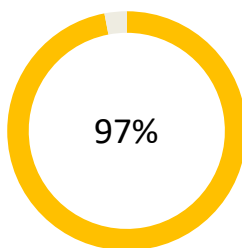
FACT CONSISTENCY SCORE



THOUGHT  
CONSISTENCY SCORE



STRAIGHT-LINER/ FLAT-  
LINER SCORE



SPEEDERS SCORE

### QUALITY CHECK SURVEY SPECIFICATION

N (Sample size)	300
IR (Incident rate)	100%
LOI (Length of Interview)	10 minutes
Success Criteria	Overall score of 80% or higher

### THE RESULTS

**Overall score** **93.5%**

Average score  
in the industry 73%

# Our quality assurance process



## Questionnaire based on the exact profile

- Refined and very detailed database panel

## Take out users with irrelevant replies

- Remove Fake questions hit users
- Remove Contradicted answer users
- Take out straight answer users

## Take out speed users

- We count the average median time and take out those who are less than that

## Manual check by the experienced researchers

- Our experienced researchers will check the relevance as well as open comments

## Re-assortment of panelist priorities

- Based on the survey results, bad users are screened out while prioritizing those who return s good feedbacks.

# Contact Us

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Contact: [info@qandme.net](mailto:info@qandme.net)

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