

What do we really know?

ask@cimigo.com

8 April 2020





All digital data collection



7 offices nationally



600 strong tablet
armed field force



40,000 online
active panel members



40 CATI stations



400 m sq.
CLT space



4 group rooms



Cimigo **Onmobile**
native app



Cimigo MROC
community platform

Cimigo is the leading independent data collection agency in Vietnam. Cimigo has interviewed 950,000 consumers, 700,000 retailers and 30,000 healthcare professionals in the past 24 months. Let us bring our unrivalled resources to bear on your projects in Vietnam.



Bring the Voice of the Customer to your boardroom

Market research to answer your most difficult questions to gain inspiration to your brand in Asia

Find out more

News & Events



Marketing planning for the big bounce back

April 05, 2020

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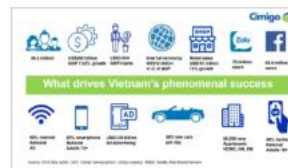


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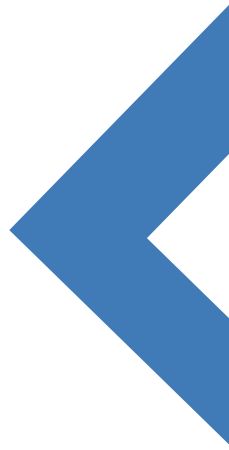
Indonesian consumers on Jakarta's pollution and ganjil genap

A Cimigo study of Indonesian consumers on Jakarta's Air Pollution...

How much bigger is the urban population of HCMC over Hanoi?



Hanoi



HCM

140%

180%



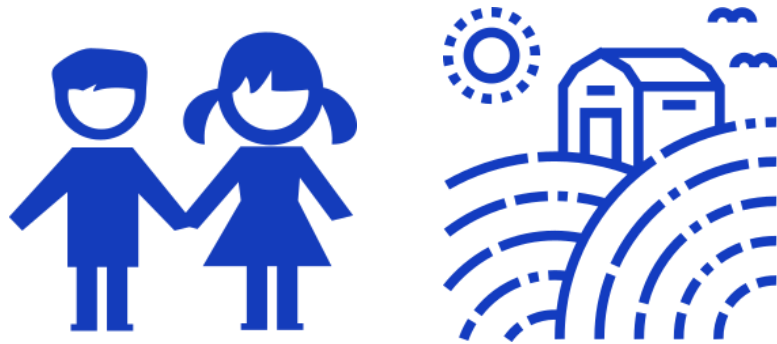
In 2019 there were 96.2 million people in Vietnam.

Vietnamese woman bear 2.09 children, but only 1.36 in HCMC.

Hanoi urban population has 3,962,927 people. HCMC urban population has 7,127,364 people.

Source: GSO, Cimigo

Vietnam's fastest growing segments?



0-12 years and Rural



50+ and Urban



Source: GSO, Cimigo

Which country is the most interconnected for trade globally?



Interconnected global trade is defined as imports plus exports as a % of GDP. Vietnam is at 200%. For SARS in 2003 and H1N1 (Swine) in 2009 Vietnam was far less interconnected.

Source: GSO, WEF, Cimigo

Which is growing at the fastest rate?



8,900 per day



885 per day



8,900 motorbikes sold per day in 2019. A 4% decline.

885 cars sold per day in 2019. A 46% increase.

Cimigo estimate that zero tolerance alcohol driving laws and media coverage, will cut alcohol sales by 17% in 2020 as the volume was highest just before TET. Sales will recover to 2019 levels in 2021.

Source: VMA, VAA, Cimigo

What proportion of women aged 20-64 work?



96%

of men (20-64 years) work



88%

of women (20-64 years) work



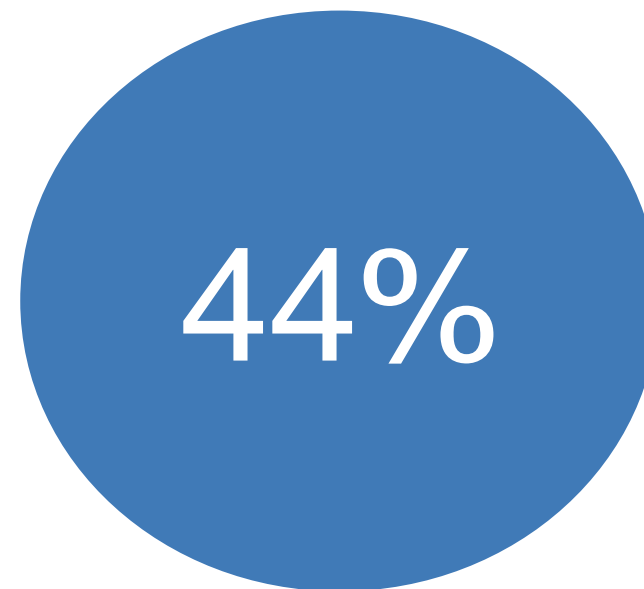
59%

**is the working population
as a % of the total in 2020.**

Highest % working population in region. It significantly lowers dependency ratios at just 0.7 per employed person. This gives GDP a huge boost. Urban working adults have on average 1.67 sources of income.
Source: GSO, Global Demographics, Cimigo

What proportion of households are now middle class?

Monthly household income of \Rightarrow 15,000,000 VND



Households with an income of \Rightarrow 10,000,000 now represent 44% of households.

Households with an income of \Rightarrow 15,000,000 now represent 20% of households

There are 27,488,281 households in Vietnam.

Source: GSO, Cimigo

Internet economy at US\$12 billion – who takes most share?



Internet economy
US\$12 billion
4.2% of GDP

US\$3 billion in 2015 and
1.7% of GDP.



31%
Online travel



38%
Online shopping



23%
**Ads, media,
games**



8%
Ride hailing



Who made the most profit in 2018?



Real question is who lost the least?

2018 losses: Shopee **-1,901** Ty VND, Lazada **-1,773** Ty VND, Tiki **-756** Ty VND, Sendo **-701** Ty VND

Source: CAFEF

Who is winning the fintech battle, so far....?



2018 losses: Momo **-1,000** Ty VND, ZaloPay **-177** Ty VND
 Source: Hanoi Times, Cimigo

Who added the most stores in 2019?



2,287 minimarts
120 supermarkets

vs. 2018
644 new stores



964 minimarts
0 supermarkets

556 new stores



400 minimarts
122 supermarkets

184 new stores

Source: Cimigo



Who has the higher click through rate for display ads?

Google

0.35%



0.89%



Source: Google and Facebook

Which took more screen time per day?

Social



2h32m
(any device)



TV/Video



2h31m
(any delivery/device)

Source: We Are Social

Which were there more of?

**Foreign air
passengers**



**42 million
(up 14% over 2018)**

**Domestic Vietnamese
air passengers**



**74 million
(up 11% over 2018)**



Source: ACV

Unleashed

1. Rapid urbanisation demands ultra convenience.
2. Most interconnected trading nation globally.
3. More women work in Vietnam than anywhere else in region.
4. Middle class acceleration.
5. Internet economy shifts consumer priorities. Internet economy at US\$12 billion.
6. Online shopping will surpass modern trade share of sales in 2028.
7. Experience economy is flying.
8. Speed of change – opportunities to leap frog abound.

BOUNCE BACK





96.2 million



US\$289 billion
GDP 7.02% growth



US\$3,004
GDP/capita



Internet economy
US\$12 billion
4.12 of GDP



Retail sales
US\$163 billion
15% growth



72 million
users



64.4 million
users

What drives Vietnam's phenomenal success



68% internet
National
All



85% smartphone
National
Adults 15+



US\$3.09 billion
All advertising



885 new cars
per day



66,000 new
Apartments
HCMC, HN, DN



48% banked
National
Adults 18+

Plan now to stay ahead of the big bounce back



New rituals and norms, some will be permanent.



Shifting shopping channels and huge boost to online.



Majority of consumers and businesses will be far more thrifty.



Comfort seeking in small indulgencies.



Communications need to be far more uplifting.



Budgets schedules between sales activation and brand need to be adjusted through stages of the bounce back.

Some of the temporary consumer behaviour changes forced upon us by the pandemic, will be permanently game changing. We will all have found new ways to working, socialising, entertaining, shopping, minimising travel costs, being thrifty, staying fit and eating well.



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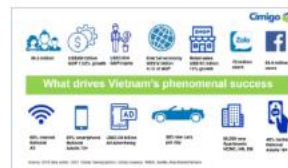


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