

December 2, 2020

E-commerce and online shopping behavior during Covid-19

YouGov[®]

Thue Quist Thomassen

CEO of YouGov Vietnam

Born in Denmark

Studied business and politics
in Hong Kong, Hanoi and
Copenhagen

12 years of Vietnam-
experience in market
research

Member of the EuroCham
Executive Committee

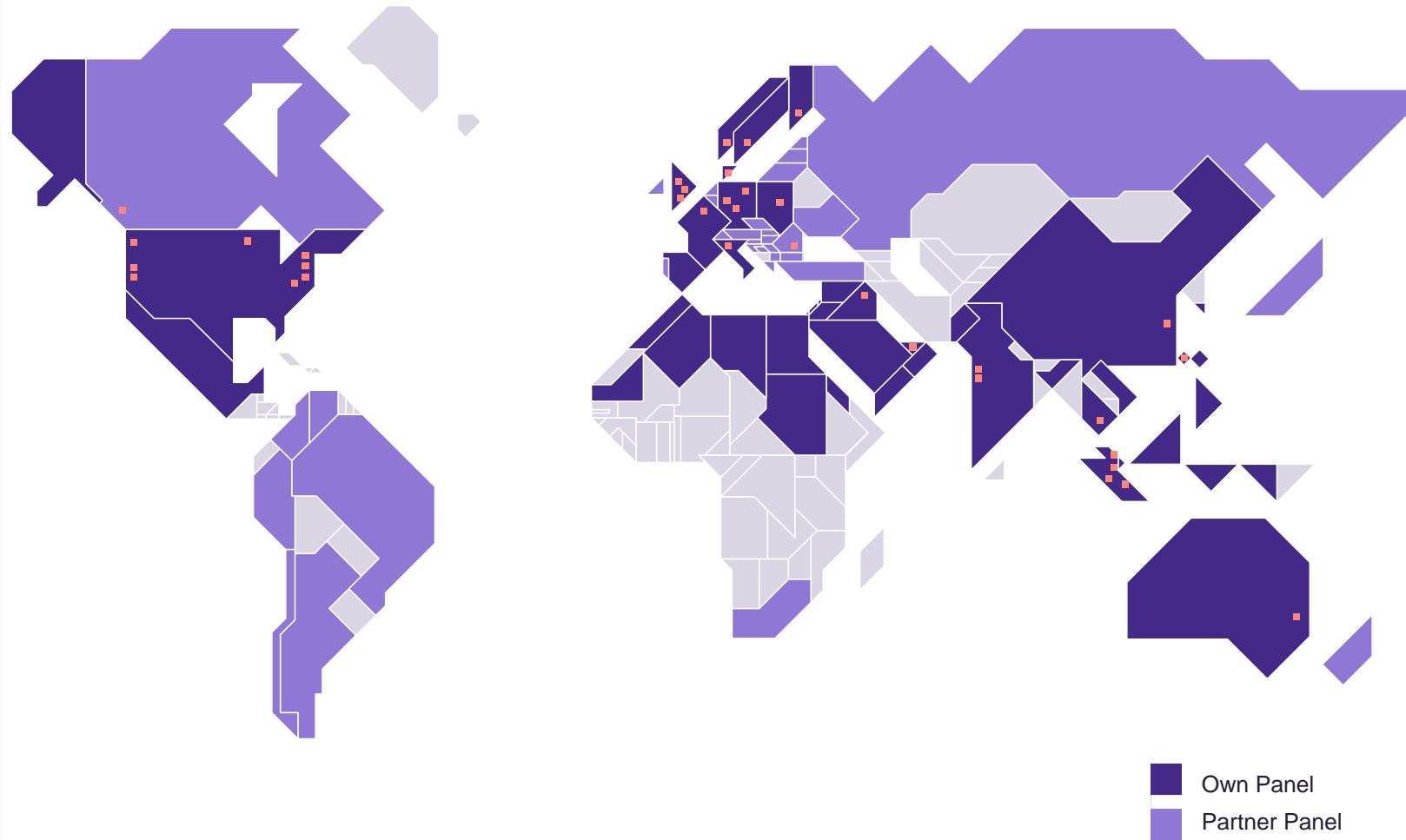


YouGov is an international **data analytics** group.

Our research base of opinion data is derived from our highly **participative** and **proprietary** panel of over 8 million people worldwide.

We combine this **continuous** stream of data with our extensive research expertise and broad industry experience to provide a range of both **systematic** syndicated and proprietary ad hoc research solutions for our clients.

YouGov has over 45 panels with on-the-ground teams in more than 25 markets globally. Leveraging technology, we work with clients from all locations.



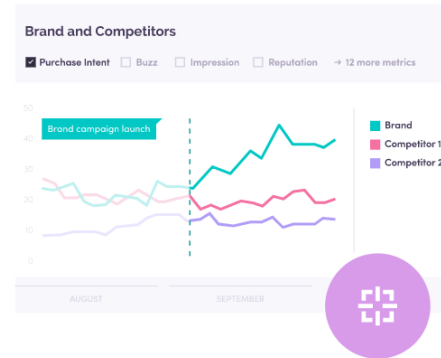
YouGovProfiles



Our 360° syndicated audience profiling and segmentation solution which allows you to understand who people are, based on variables we collect from our panellists.

16,000 annual interviews.

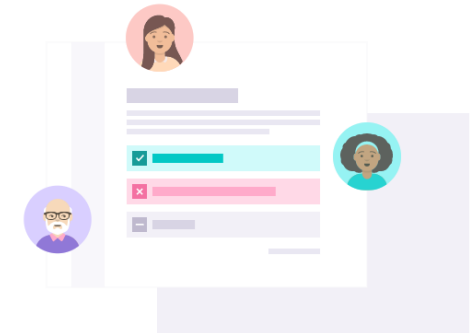
YouGovBrandIndex



Our flagship syndicated brand tracker that allows you to understand how your brand is being perceived on a continuous daily basis, based on a set of 16 key brand metrics.

43,800 annual interviews.

YouGovRealTime



Our ad-hoc solution that allows you to ask your questions to a set of audiences (representative or targeted) to better understand their responses to that set of proprietary questions.

What will I learn the next 15 minutes?

E-commerce spending in 2020

How do the top players differ?

Will Vietnam go cashless?

YouGov[®]

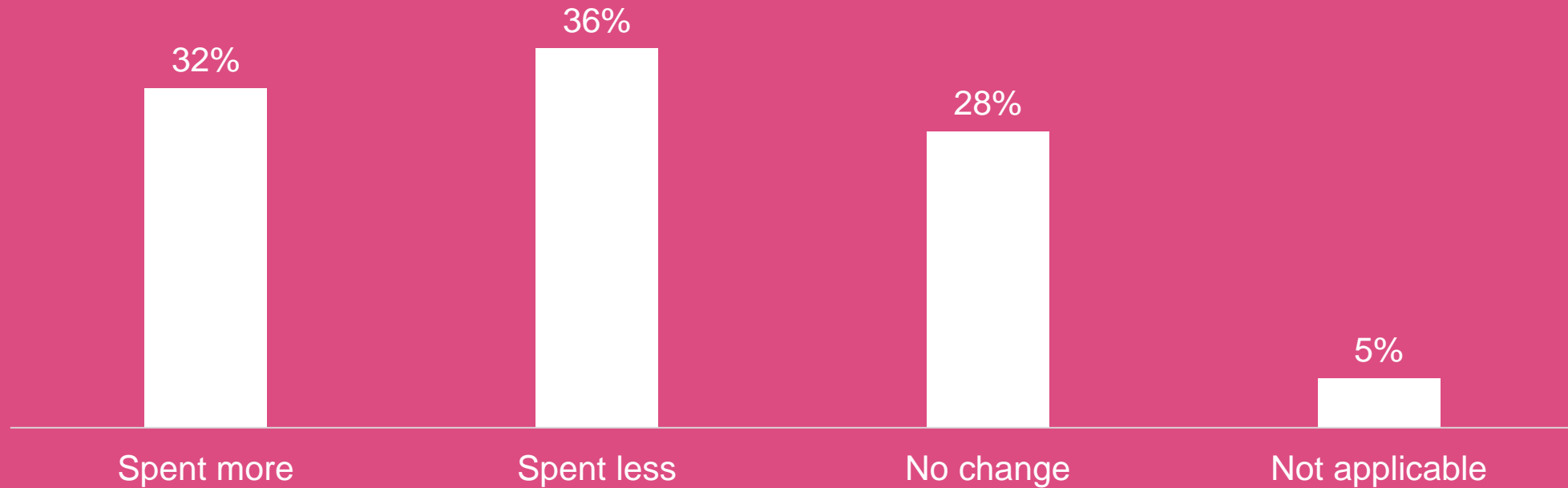
What happened to Vietnamese e-commerce during Covid-19?

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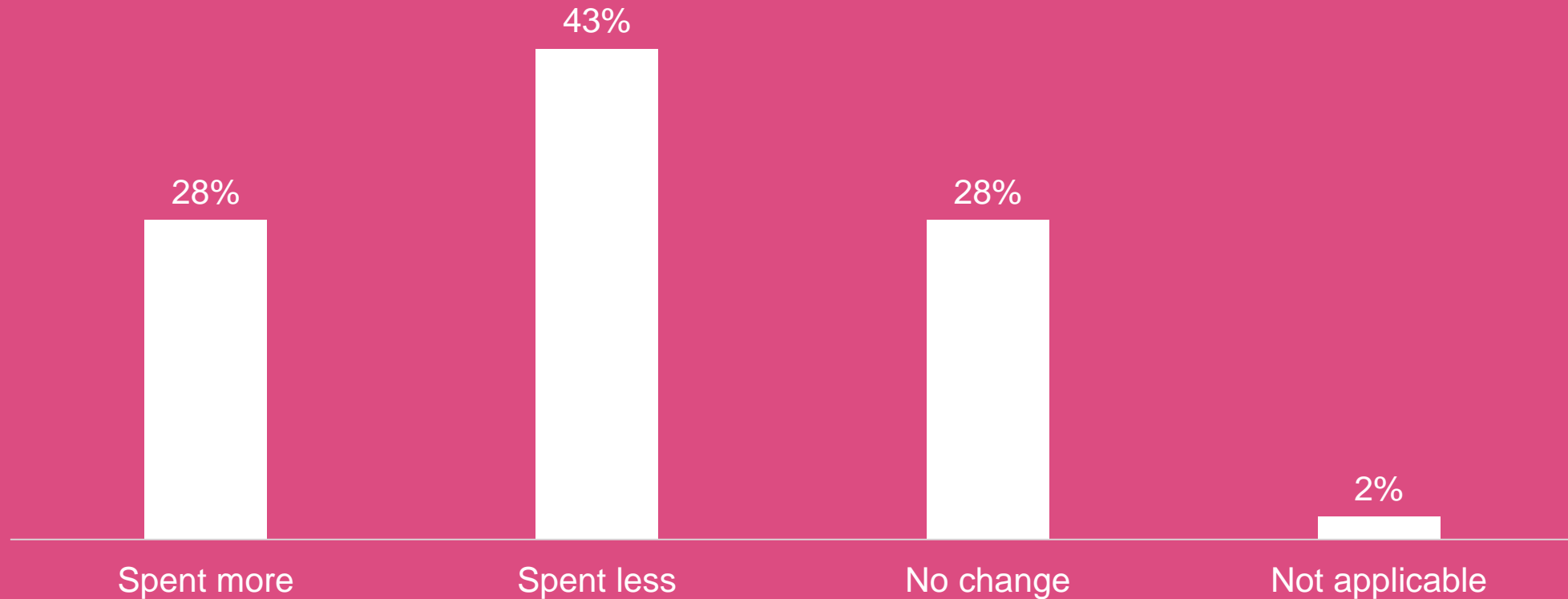
**Did “Covid-
shopping”
boost
Vietnamese
e-commerce?**



Spending in online retail saw a modest spike



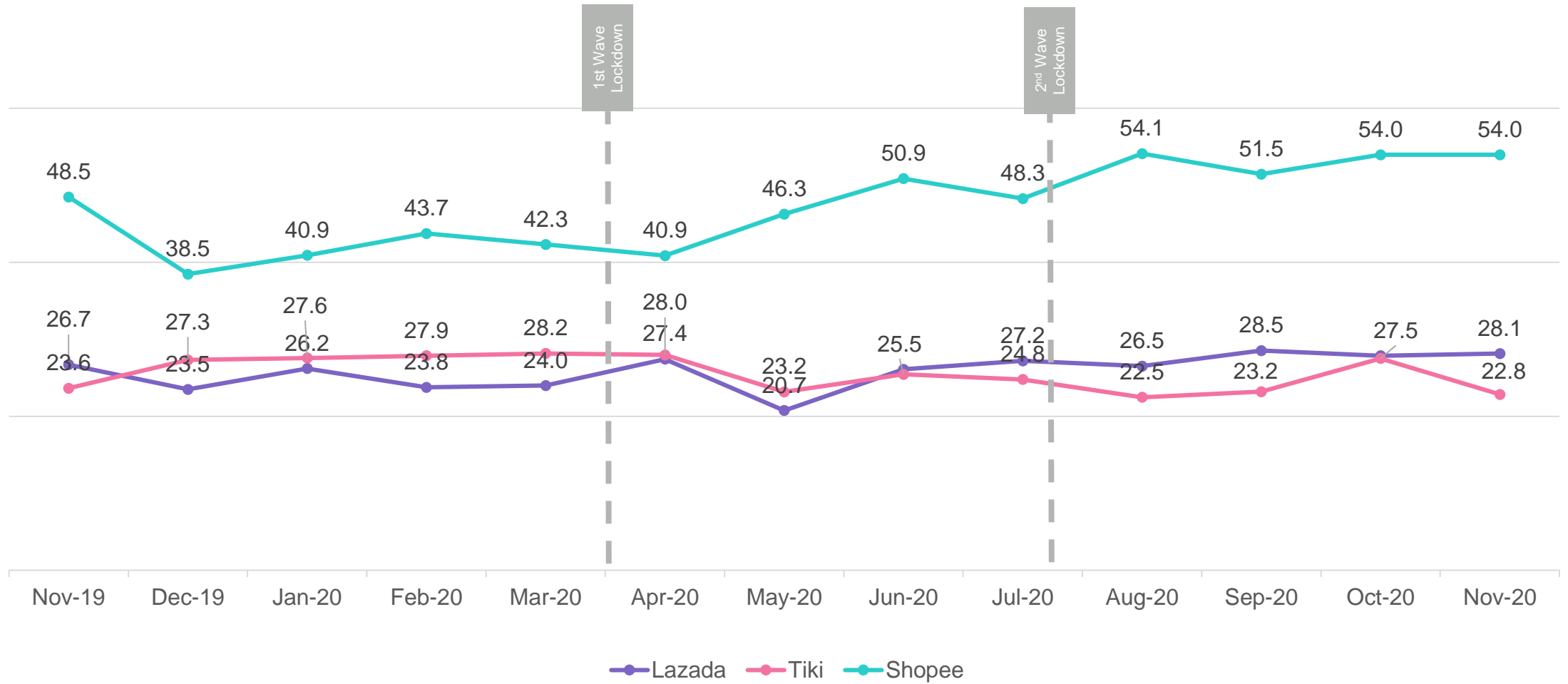
And managed to outperform the general drop that is seen in physical spending





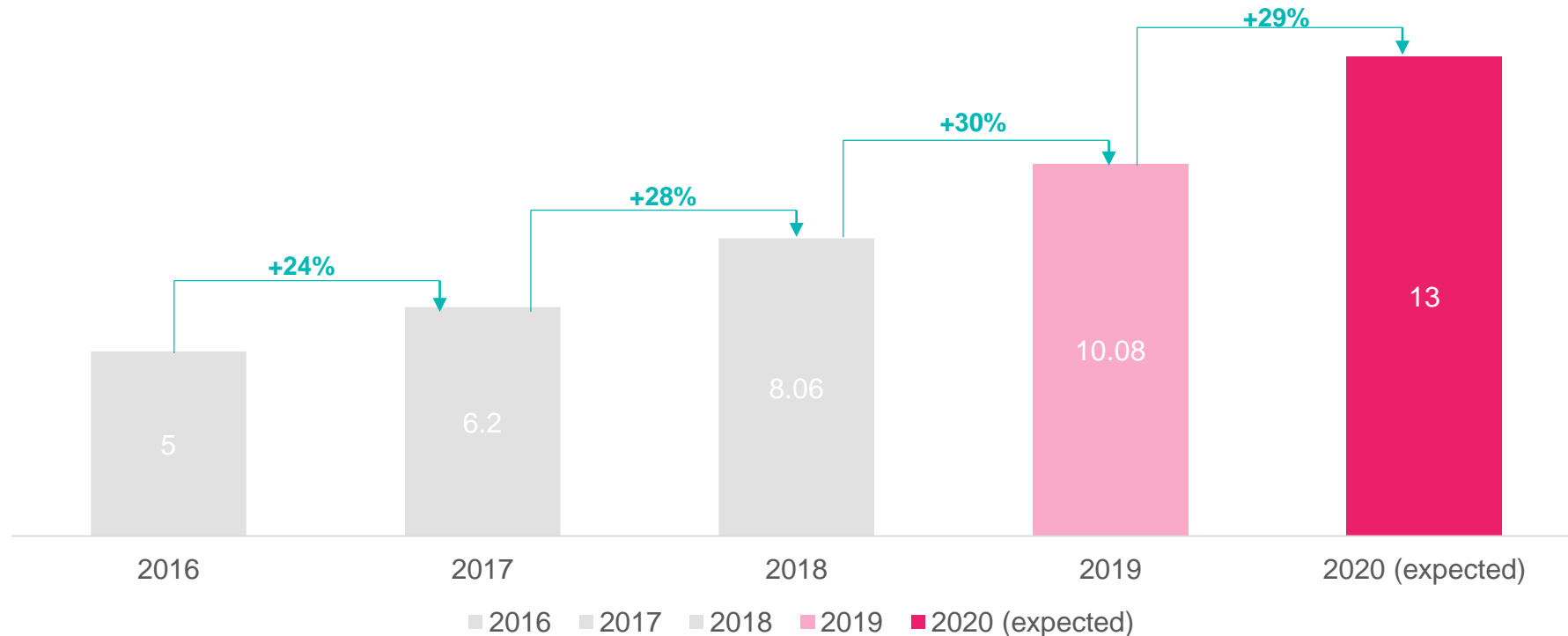
**Top players
were largely
unaffected
by lockdown**

Shopee, Tiki & Lazada – Current Customers (%)



E-Commerce revenue is projected to grow at a stable 29% this year

Revenue (\$ billions) and growth rate (%) of Vietnam's E-commerce sector



Source: Vietnam E-Commerce Whitebook, Vietnam E-Commerce and Digital Economy Agency, 2020

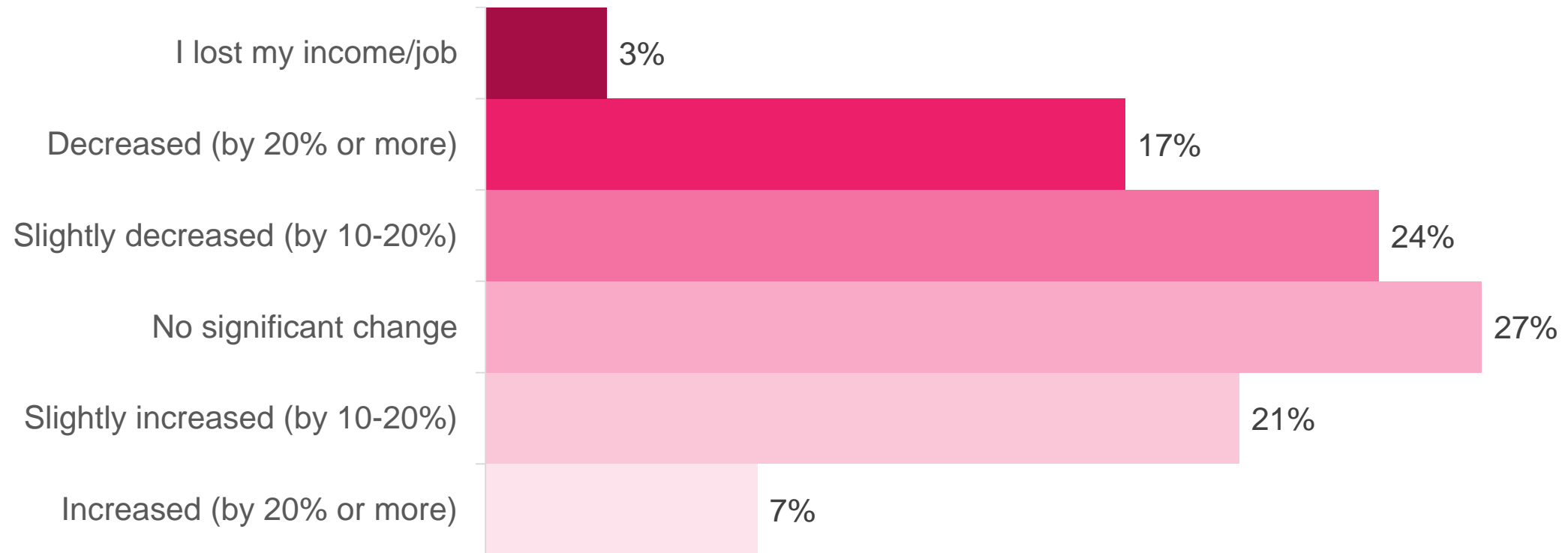
However...



**Watch out
for
tightening
belts**



Vietnam has seen very little fiscal stimulus and salaries are taking a hit



Now, let's turn to the brands

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This November, YouGov launched its Global Best Brands 2020 rankings



VIR Vietnam Investment Review

Corporate Investing Green Growth Property Money Timeout Sports Society World News Your Consultant

Coverage

E-commerce brands dominate YouGov Best Brands list on the Vietnam

Home » E-commerce brands dominate rankings of YouGov Best Brands 2020 in Vietnam

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Vietcetera.

Business · Nov 26, 2020

E-commerce Brands Dominate YouGov Best Brands Ranking In Vietnam

National carrier Vietnam Airlines holds

Forbes Vietnam

Tin mới Kinh doanh Doanh nghiệp Công nghệ Danh sách Góc nhìn

Vietnam Airlines tiếp tục dẫn đầu danh sách thương hiệu tốt nhất YouGov

Tác giả TRÂM BI - 15/11/2020

Vietnam Airlines tiếp tục dẫn đầu bảng xếp hạng thương hiệu tốt nhất tại Việt Nam năm 2020 của YouGov. Các thương hiệu thương mại điện tử ghi dấu ấn nổi bật do sự gia tăng mua sắm trực tuyến giai đoạn dịch bệnh Covid-19.

Công ty nghiên cứu thị trường quốc tế YouGov của Anh vừa công bố bảng xếp hạng thương hiệu toàn cầu (BrandIndex Rankings 2020). Bảng xếp hạng thương hiệu tốt nhất và 10 thương hiệu cải tiến nhất ở mỗi quốc gia. Tại Việt Nam.

Tinhtuong News

Vietnam Airlines tops YouGov best brand ranking

Published 1 week ago on November 20, 2020

Vietnam Airlines tiếp tục dẫn đầu danh sách thương hiệu tốt nhất, trên bảng xếp hạng hàng năm những thương hiệu lành mạnh toàn quốc của YouGov. Việc xếp hạng được dựa trên số điểm Index từ YouGov BrandIndex, công cụ liên tục đo lường sức khỏe của thương hiệu.

Điểm Index này được tính từ nhận thức của người tiêu dùng về các khía

BRANDS Vietnam Brands - Agency - Strategy Creative Thị trường - Kiến thức - Quan điểm Cộng đồng

YouGov: Các nền tảng thương mại điện tử thống trị danh sách các thương hiệu tốt nhất tại Việt Nam

YouGov Vietnam

Việt Nam Airlines tiếp tục dẫn đầu danh sách thương hiệu tốt nhất, trên bảng xếp hạng hàng năm những thương hiệu lành mạnh toàn quốc của YouGov. Việc xếp hạng được dựa trên số điểm Index từ YouGov BrandIndex, công cụ liên tục đo lường sức khỏe của thương hiệu.

Điểm Index này được tính từ nhận thức của người tiêu dùng về các khía

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CafeCredit » YouGov's Best Brands in Vietnam 2020 - Vietnam Airlines topped the list

YouGov's Best Brands in Vietnam 2020 - Vietnam Airlines topped the list

Saturday 21, 11 2020

This is the second consecutive year that Vietnam Airlines has reached the top of Vietnam's Best Brands in 2020 published by YouGov, a reputable international Internet-based market research and data analytics company.

YouGov

BEST BRANDS IN VIETNAM 2020

Vietnam Airlines topped the list

Overview of export-import turnover of Vietnam's chemicals and chemical products

SHOPEE LEADS IN Q3 E-COMMERCE TRANSACTIONS SKYROCKET ON 11/11

COAL IMPORTS AND EXPORTS IN THE FIRST 6 MONTHS OF 2020

"National Brands of Vietnam" - The recognition for Vietnamese products

Vietnam's weekly financial-monetary update (Week 47 - 2020)

Banking News (November 24th, 2020)

Top 10 Brands in Vietnam



BEST BRANDS 2020 VIETNAM
Top Ranked
1st Vietnam Airlines

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BEST BRANDS 2020 VIETNAM
Top Ranked
2nd Samsung



BEST BRANDS 2020 VIETNAM
Top Ranked
5th Panasonic



BEST BRANDS 2020 VIETNAM
Top Ranked
8th Omachi



BEST BRANDS 2020 VIETNAM
Top Ranked
3rd Thế giới di động



BEST BRANDS 2020 VIETNAM
Top Ranked
6th Tiki.vn



BEST BRANDS 2020 VIETNAM
Top Ranked
9th Kinh Do



BEST BRANDS 2020 VIETNAM
Top Ranked
4th Hào Hào



BEST BRANDS 2020 VIETNAM
Top Ranked
7th Shopee



BEST BRANDS 2020 VIETNAM
Top Ranked
10th Điện máy xanh

Top 10 improvers

YouGov

BEST BRANDS 2020 VIETNAM

Top Improver

1st Shopee

YouGov®

YouGov

BEST BRANDS 2020 VIETNAM

Top Improver

2nd Lifebuoy

YouGov

BEST BRANDS 2020 VIETNAM

Top Improver

3rd MoMo

YouGov

BEST BRANDS 2020 VIETNAM

Top Improver

4th ViettelPay

YouGov

BEST BRANDS 2020 VIETNAM

Top Improver

5th AirPay

YouGov

BEST BRANDS 2020 VIETNAM

Top Improver

6th Bách Hóa Xanh

YouGov

BEST BRANDS 2020 VIETNAM

Top Improver

7th Hào Hào

YouGov

BEST BRANDS 2020 VIETNAM

Top Improver

8th Concung

YouGov

BEST BRANDS 2020 VIETNAM

Top Improver

9th UNIQLO

YouGov

BEST BRANDS 2020 VIETNAM

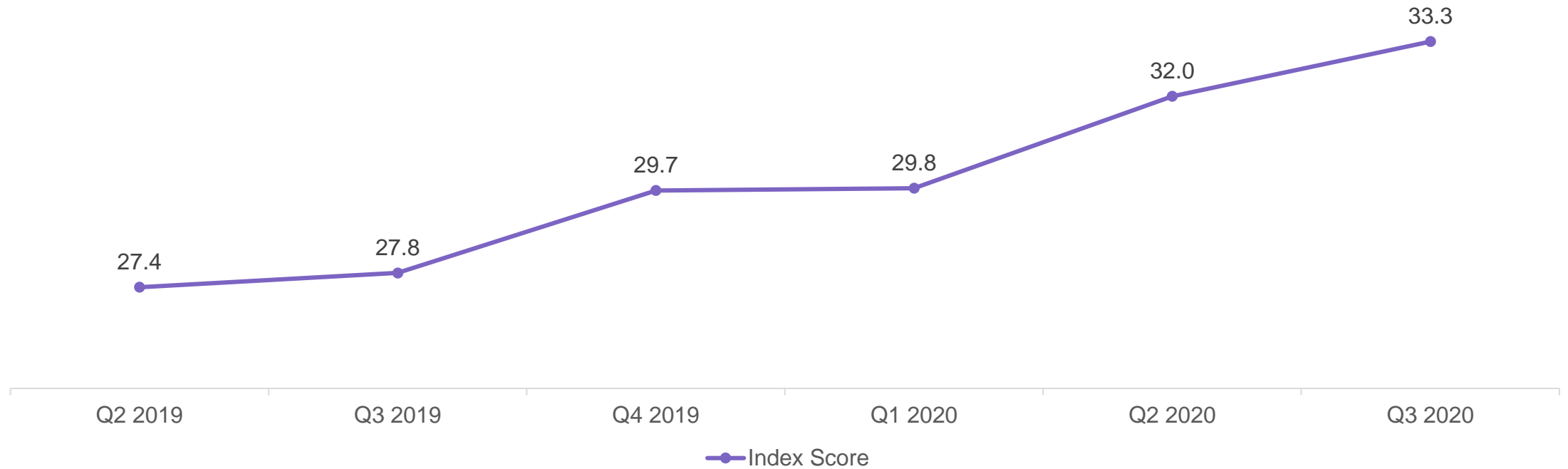
Top Improver

10th Tiki.vn



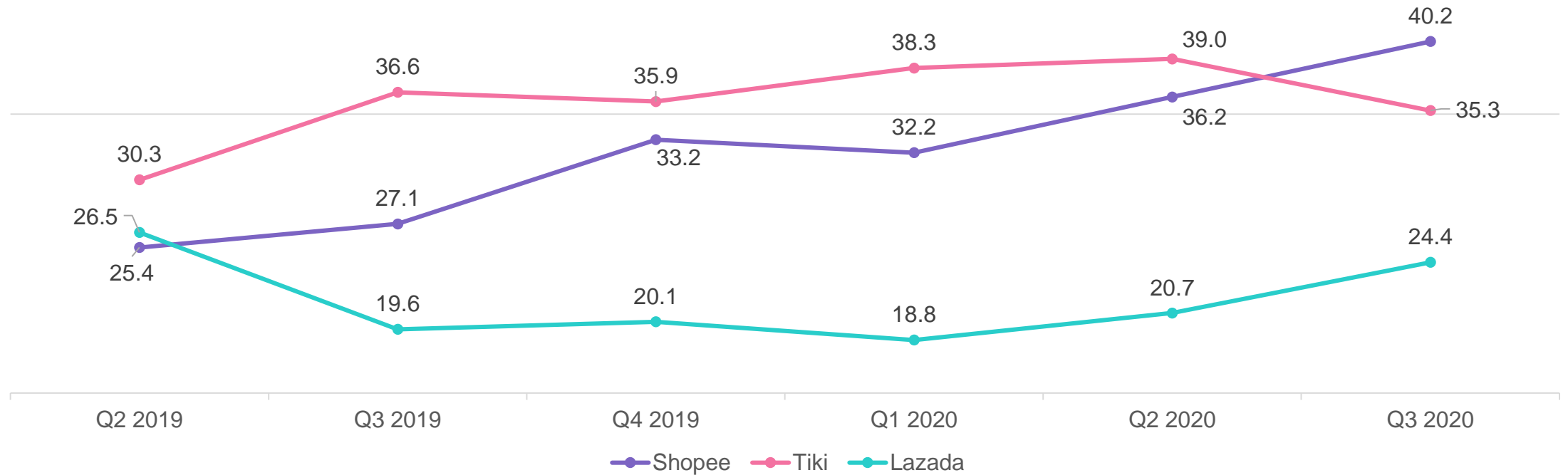
Top E-commerce players see continuous brand health growth

Top 3 E-commerce Players – Aggregate Index Score (Lazada, Tiki, Shopee)



Shopee is taking the lead in strengthening its brand health

Shopee, Tiki & Lazada – Index Score



**Let's have a look at
some of the
differences...**

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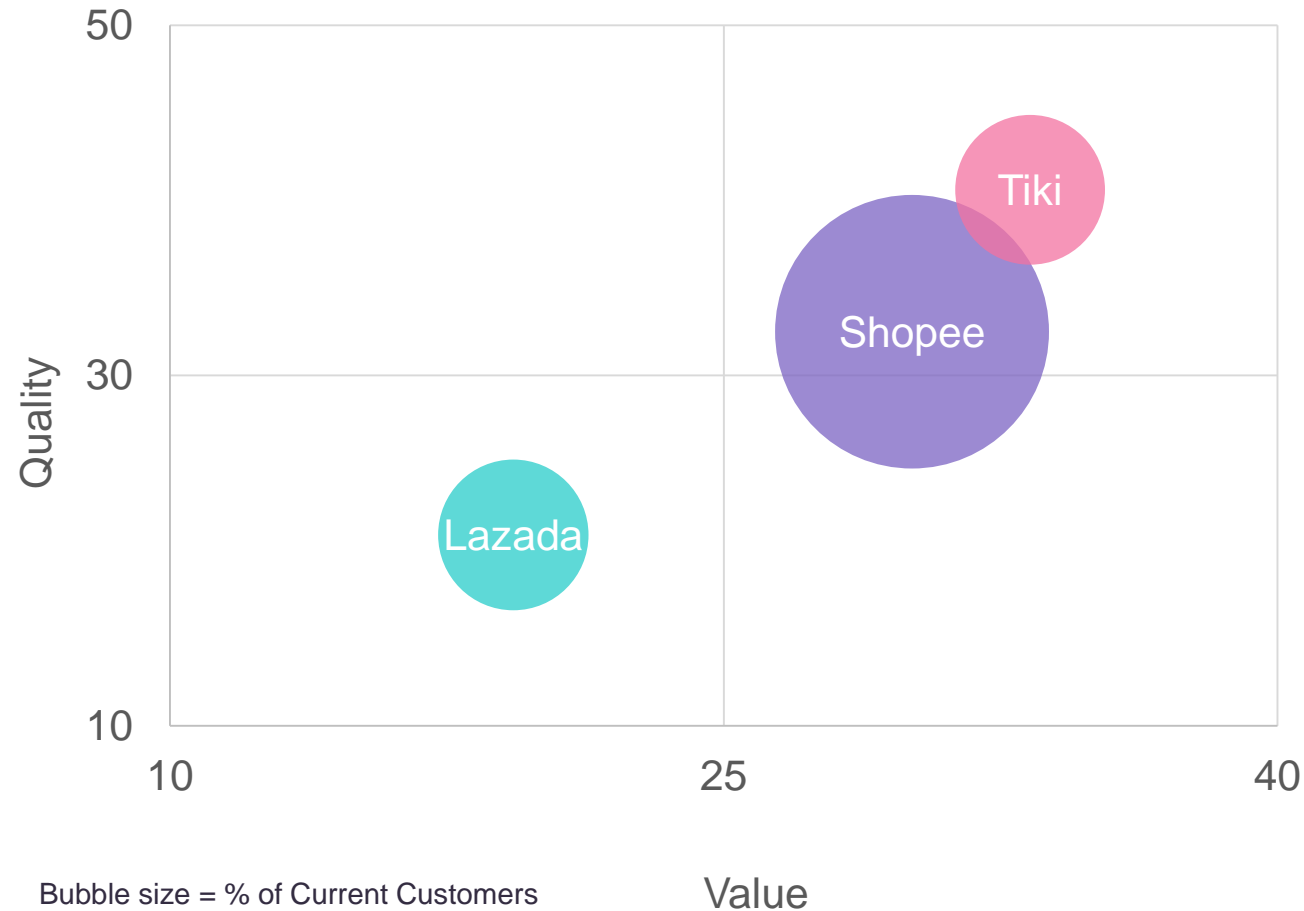
Top e-commerce sites rely on establishing a good impression on consumers and earning their recommendation for growth



Shopee's large customer base is maintained and supported by both its advertising efforts and recommendations from its customer.

Tiki meanwhile relies on recommendation to acquire and keep its buyers.





Despite having a smaller consumers base, Tiki maintains its position in the market by being the top provider of quality and good value for money.

Shopee is above market average for both metrics, but focuses more on providing good value than top-notch quality.



- Largest customer base
- Strong customers' recommendations & advertising efforts
- Marketing target all generations and all ad formats
- Position themselves as good value for money



- Heavy focus on digital formats, especially on Social Media
- Strong in earning customers' recommendations and impression
- Dominate in delivering quality and good value for money



- High brand awareness
- Generate lots of public attention through social media and high-profile KOLs
- Market positioning is being challenged by its key competitors

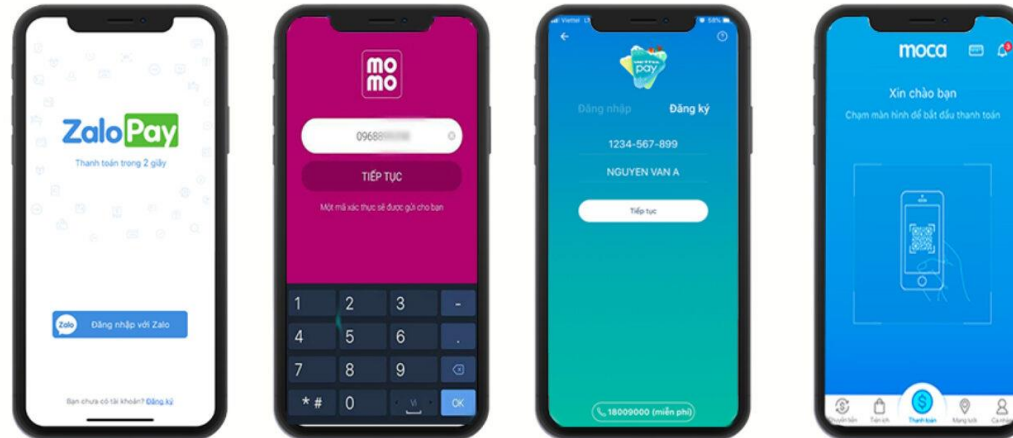
Could Vietnam go cashless?

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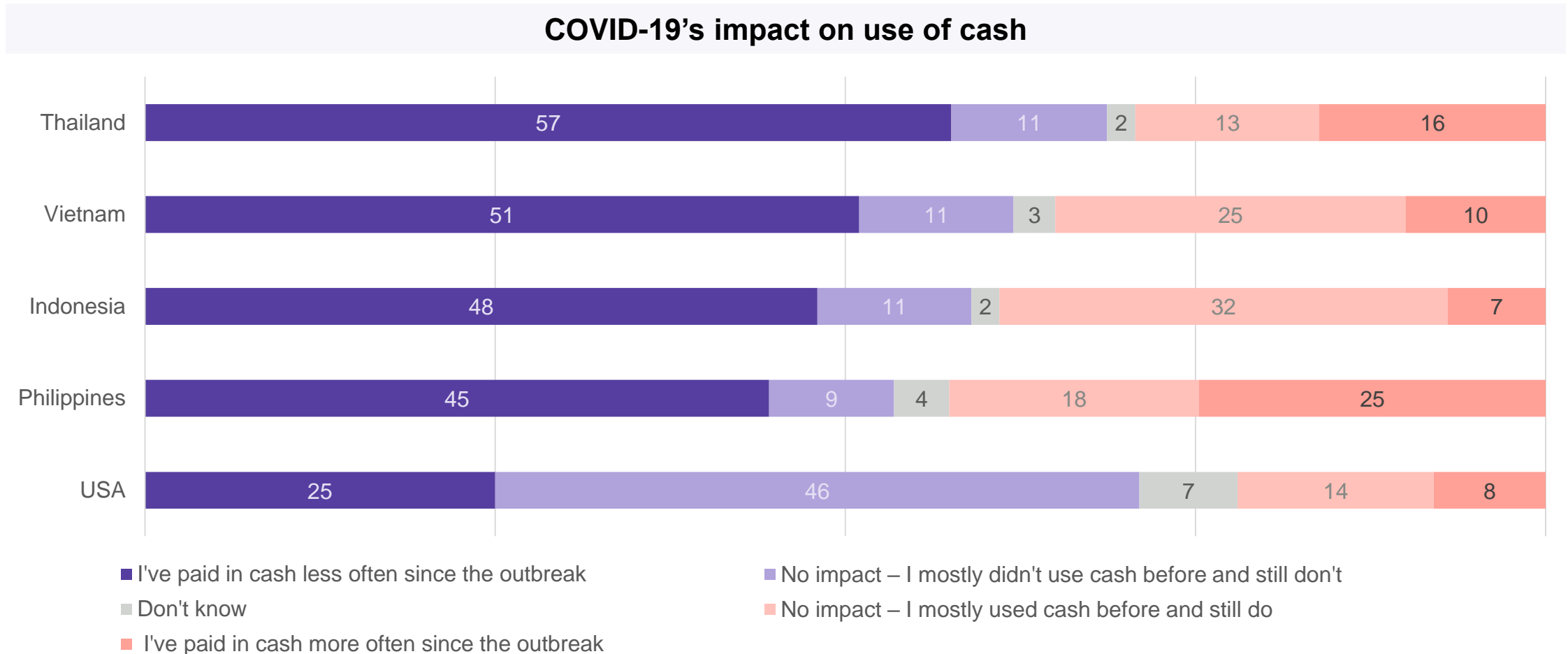
**Could this
really
become...**



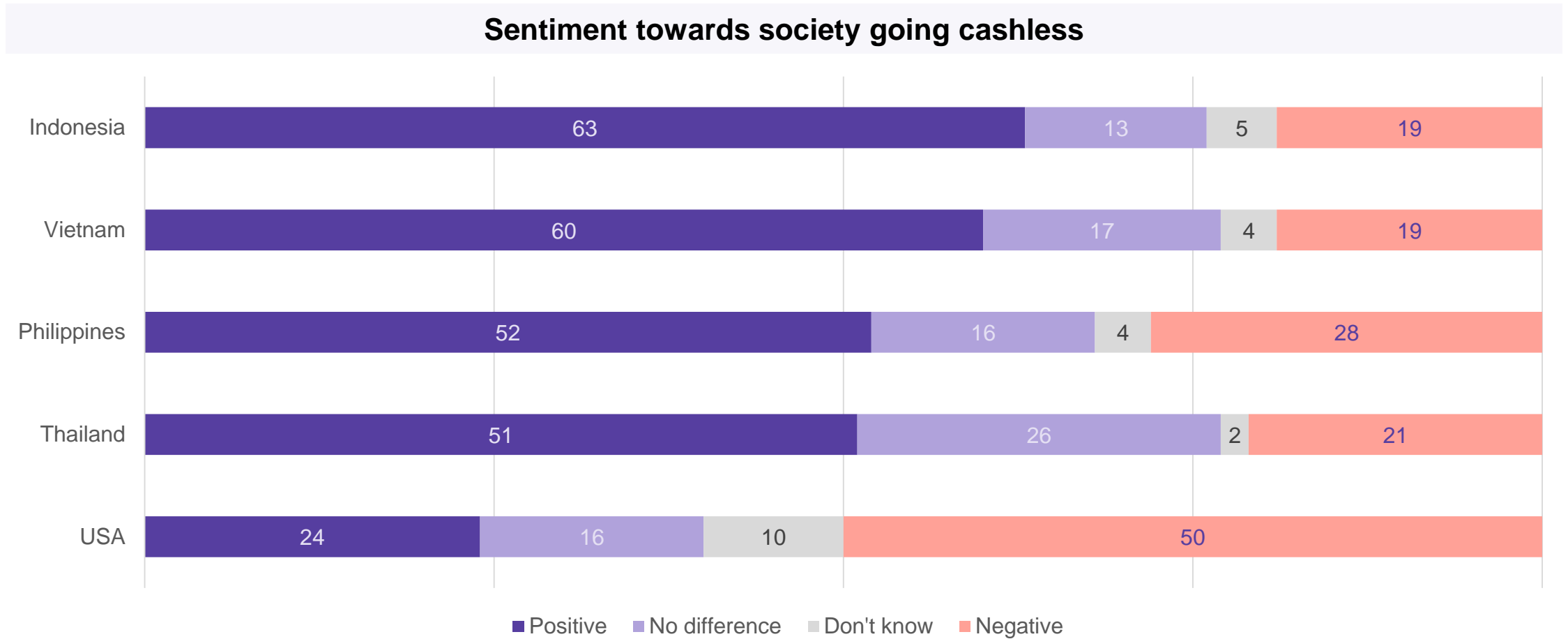
This...?



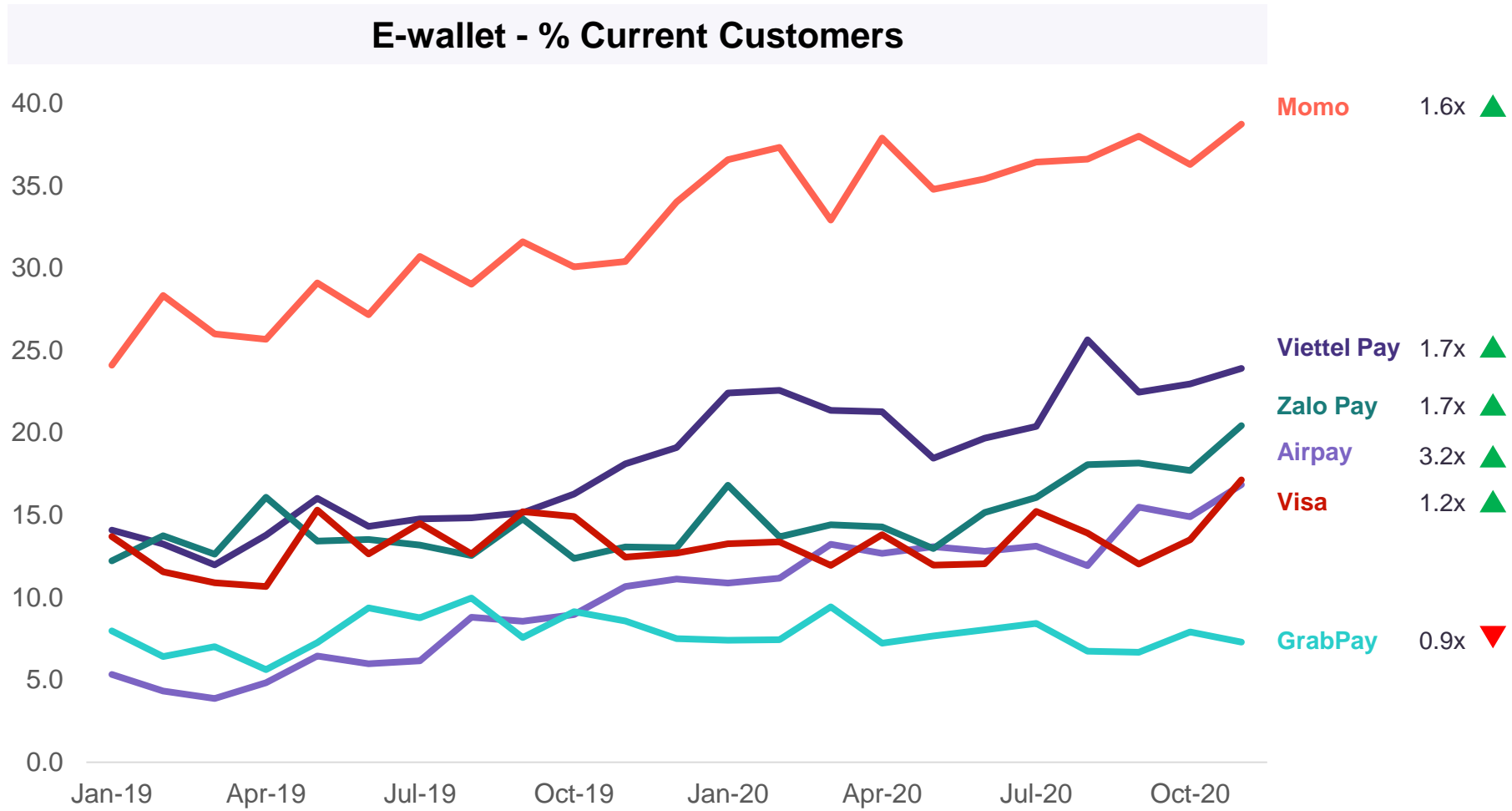
51% Vietnamese say they use cash less often since COVID-19 outbreak



60% Vietnamese think positively about Vietnam going cashless(!)



E-wallets are taking off



Summary

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E-commerce continues its growth trajectory despite Covid-19

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E-commerce continues its growth trajectory despite Covid-19

Branding and differentiation is increasingly important in e-commerce

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E-commerce continues its growth trajectory despite Covid-19

Branding and differentiation are increasingly important in e-commerce

E-wallets are taking off amid Covid-19

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Thank you for your attention!

**The best panel,
the best data,
the best tools**

YouGov[®]

The background features several overlapping, semi-transparent geometric shapes. On the right side, there are three prominent shapes: a teal one at the top, a pink one in the middle, and a purple one at the bottom. These shapes are layered, with some appearing as outlines and others as solid colors. The overall aesthetic is modern and data-oriented.