



Vietnam consumer trends 2016

High income households doubled whilst economy tripled

05



15



Urban HH >US\$500	1.84 m	122%	4.08 m
Ad spend	280 m	579%	1.9 billion
GDP/person	US\$532	261%	US\$1,923
Economy	44 billion	298%	175 billion
Pop	83 m	10%	91 m

Life stages are maturing, as do purchase priorities

05



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Young single	37.3 m	-2%	36.8 m	33.5 m
Young married - no kids	9.1 m	-3%	8.8 m	7.0 m
Young married - a child < 10	18.4 m	-5%	17.4 m	12.9 m
Married youngest child >9 & <20	7.6 m	36%	10.3 m	12.9 m
Empty nester	4.6 m	63%	7.5 m	13.6 m
Old single	5.8 m	74%	10.1 m	16.2 m

25

Household structures change, with less kids setting priorities

05



33% of households had no children

19.4 m households
4.3 people/household

5.5 m urban
4 people/household

15



44% of households have no children

24.6 m households
3.7 people/household

8.7 m urban
3.4 people/household

New retail chasing share before profits

05



E-commerce is scratch cards at internet cafes

47 supermarkets

135 modern self service stores, mostly independent.

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Over 50,000 sites with Vietnam payment gateways plus Facebook stores
Impact on games, fast fashion, health supplements and appliances

975 supermarkets

1,800 modern self service stores, mostly chains. Sales dominated by young adult snacking hang outs.

Coffee, beer and fast service chains grow

05



Trung Nguyen and
Café Highlands

Beer garden dominance
6.6 litres per person

15



8 café brands with >160 outlets
Trung Nguyen has >1000

Rise in F&B chains

Rise in multi brand beer clubs
36.75 litres per person

Health consciousness translates into action

05



Health #3 concern

Food safety

Superficial claims of de-tox

Claimed regular exercise

15



Health #3 concern

Food safety

Vin Group Vineco invests in
hygienic fresh vegetable
production

Rise in organic and natural claims

Spend traditional remedies

60%:40% modern medicine

Health consciousness translates into spend

05



Health #3 concern

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Consumers spend US\$2 billion on overseas healthcare

120+ stores from 6 pharmacy chains
My Chau, Pharmacity , IC, Eco, V-Phano, Y Duc.

<http://sieuthiduocphamyte.com/>

100+ branded chain gyms

80+ branded health & beauty care stores;
Medicare, Guardian, GNC

Conspicuous consumption has always been mobile

05



What I drive

The Gioi Di Dong opened the 4th store.

15



What drives me

Over **1,450** stores from The Gioi Di Dong, FPT, Viettel and Viet Thong A.

Keeping up with the Nguyen's with consumer finance

05



6,000 new apartments sold

25,000 new car sales

US\$1.6 billion in consumer loans
3.6% of GDP

15



36,000 new apartments sold

120,000 new car sales

USD16 billion in consumer loans
9% of GDP

Home & improvements 40%
Home appliances / electronics 30%
Motorbikes / cars 15%

Self expression is far easier and immediate

05



Yahoo blogs

Singing

Football fever

15



35 million consumers posting emoticons, stickers, selfies and status updates

Mobile drives internet penetration and habits

05

15



Internet national penetration	13%	48%
Any mobile 15+ user	37%	69%
Smartphone 15+ user	NA	28%
Urban frequent online access	20%	72%
Urban time spent	120 min	180 min
Online mobile page views	NA	25%
View video on mobile	NA	23%

Mobile app
downloads grew
60% in 2015

Fragmented opportunities as mobile, video and IP TV converge

05



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The convergence of video and mobile, which when married with local media content and efficient streaming will reap huge rewards.

Watch out for [Clip](#) which has an abundance of local video on demand content and is closest you can come to a local YouTube in Vietnam.

Others include established telecommunications firms [FPTplay](#) (FPT), [NetTV](#) (Viettel) [MyTV](#) (VNPT) and new entrants [Fim+](#) and [Netflix](#) which may be limited by a focus on Hollywood content.

Experiences key to fulfilment

05



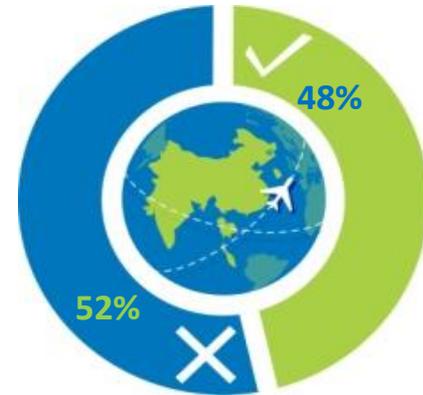
Focus on what I have

New brands, new durables

Travel tour groups

Domestic focus

15



Focus on what I have done

New experiences, places and adventure

Personal fulfillment and social validation

Independent travel further afield

Let Cimigo be the voice of your customers



7 offices
nationally



Cimigo
OnMobile
native app



40,000
active panel
members



Cimigo MROC
community
platform



40 CATI
stations



400 m sq.
CLT space



4 group
rooms



600 strong
tablet armed
field force

10 trends impacting purchase priorities



1. High income households doubled, whilst economy tripled.



2. Life stages are maturing. Household structures change, with less kids setting priorities.



3. New retail chasing share before profits.



4. Coffee, beer and fast service chains grow.



5. Health consciousness translates into action and spend.



6. Conspicuous consumption has always been mobile.



7. Keeping up with the Nguyen's with consumer finance.



8. Self expression is far easier and immediate.



9. Mobile drives internet penetration and habits. Fragmented opportunities as mobile, video and IP TV converge.



10. Experiences key to fulfilment.

Hãy lên tiếng để được lắng nghe

> Hãy tham gia thảo luận để tạo nên sự khác biệt

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