

BBG Research Series



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The Changing Media Landscape in Vietnam

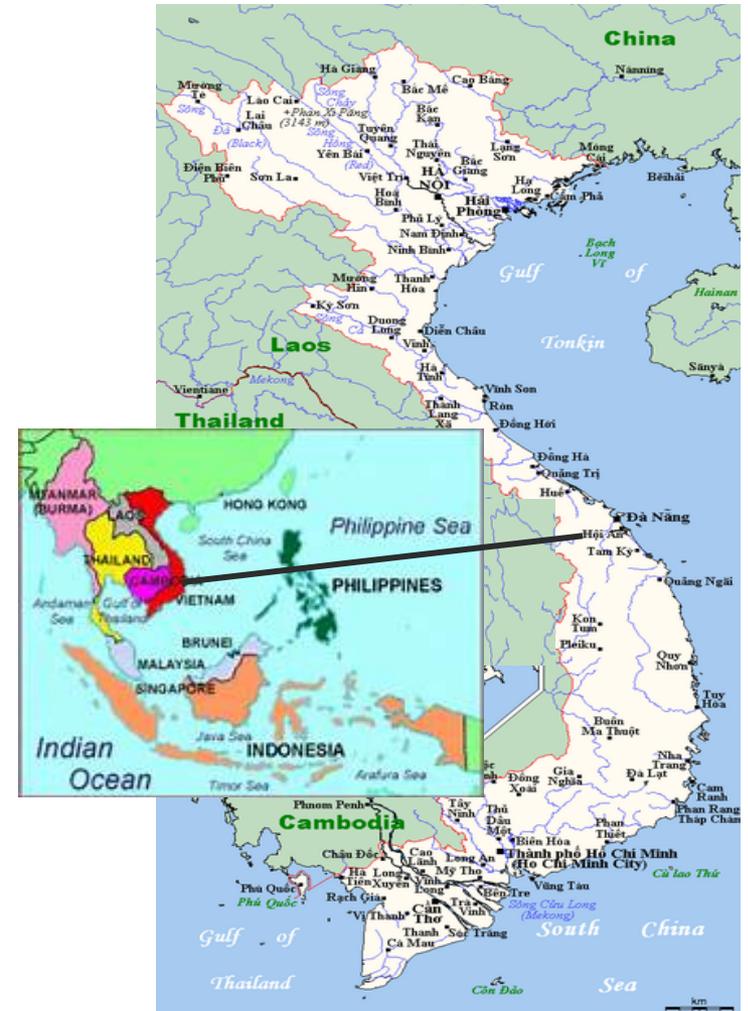


Vietnam

Findings from the World Poll

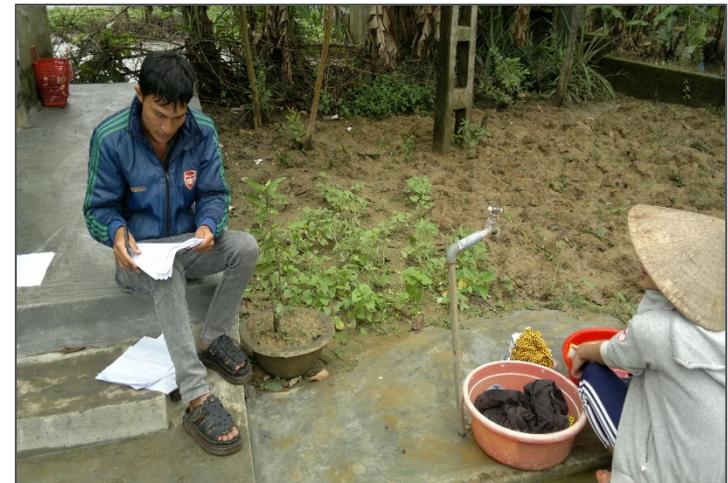
Vietnam Surveys — Background and Conditions

- Since 2006, there have been 10 annual national surveys of individuals aged 15 and older
 - Nationally representative of more than 57 million Vietnamese
 - Geographic exclusions in 2014 of areas that were deemed unsafe or remote areas representing about 10% of the total population
 - Sample size: 1,000 per year
 - Face-to-face mode
- PAPI: 2006-2014
- Response Rate: 71%



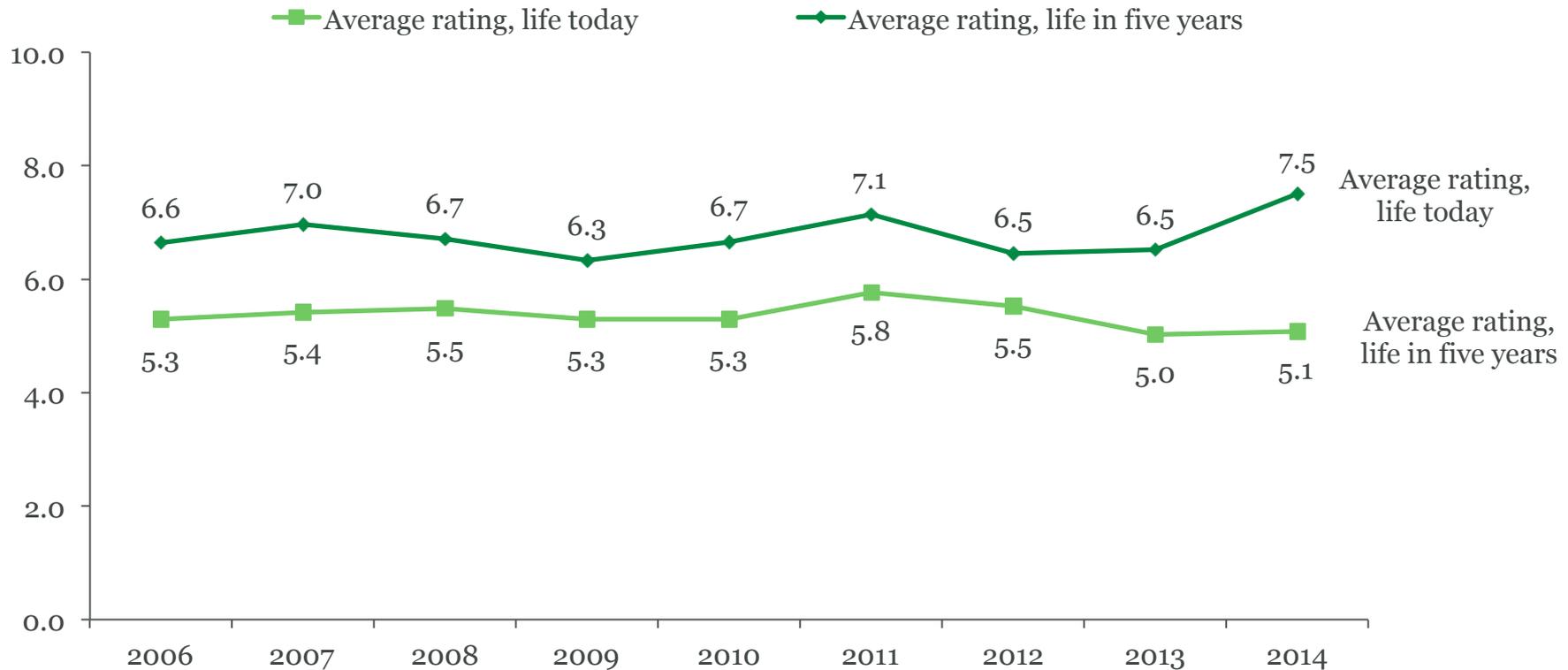
Conducting Survey Research in Vietnam

- Challenging transportation infrastructure
 - Far flung provinces with poor/no roads make travelling difficult
- Weather exacerbates difficulties
 - Flooding makes in-person interviewing difficult
 - October–April, central; May–September, north and south
- Disputed areas or areas under strict government control for security reasons
- Language barrier



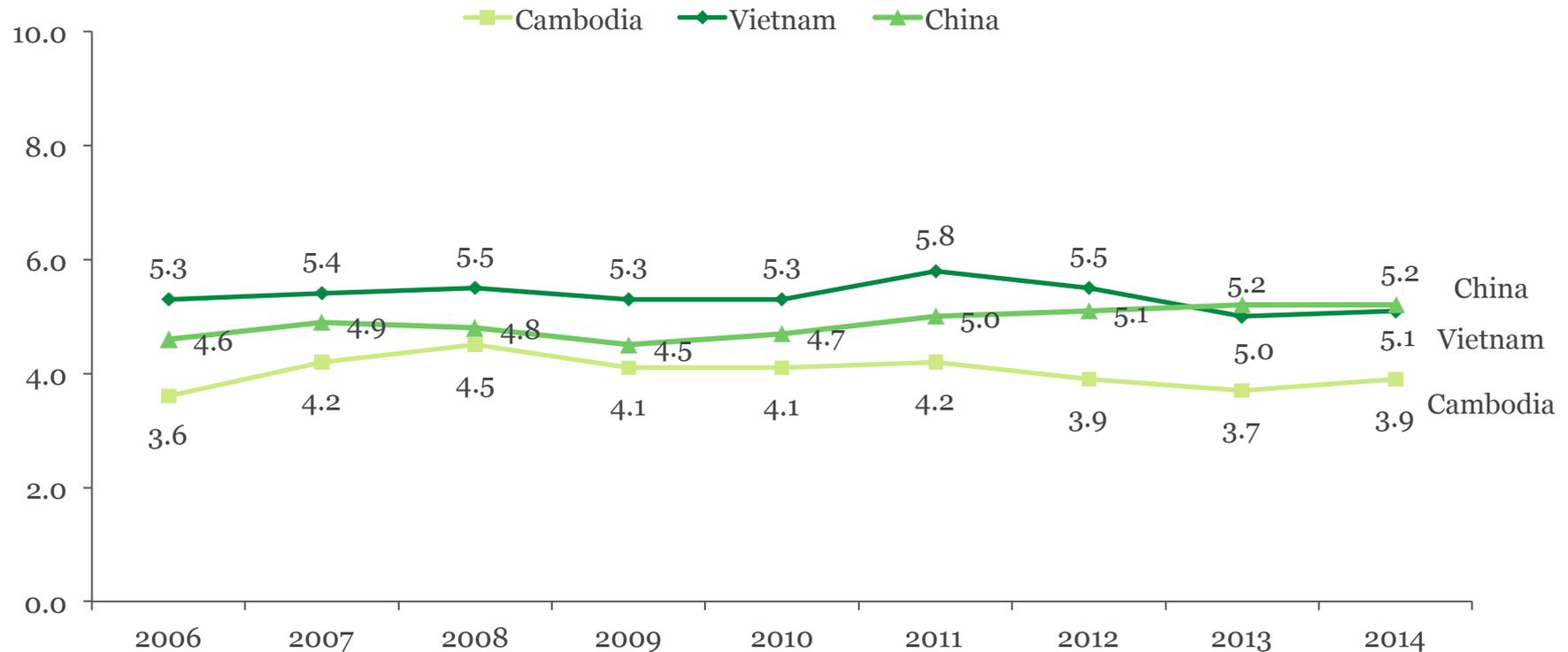
Vietnamese optimism about the future shows an increase

Please imagine a ladder with steps numbered from zero to 10. On which step would you say you currently stand? On which step do you think you will stand five years from now?



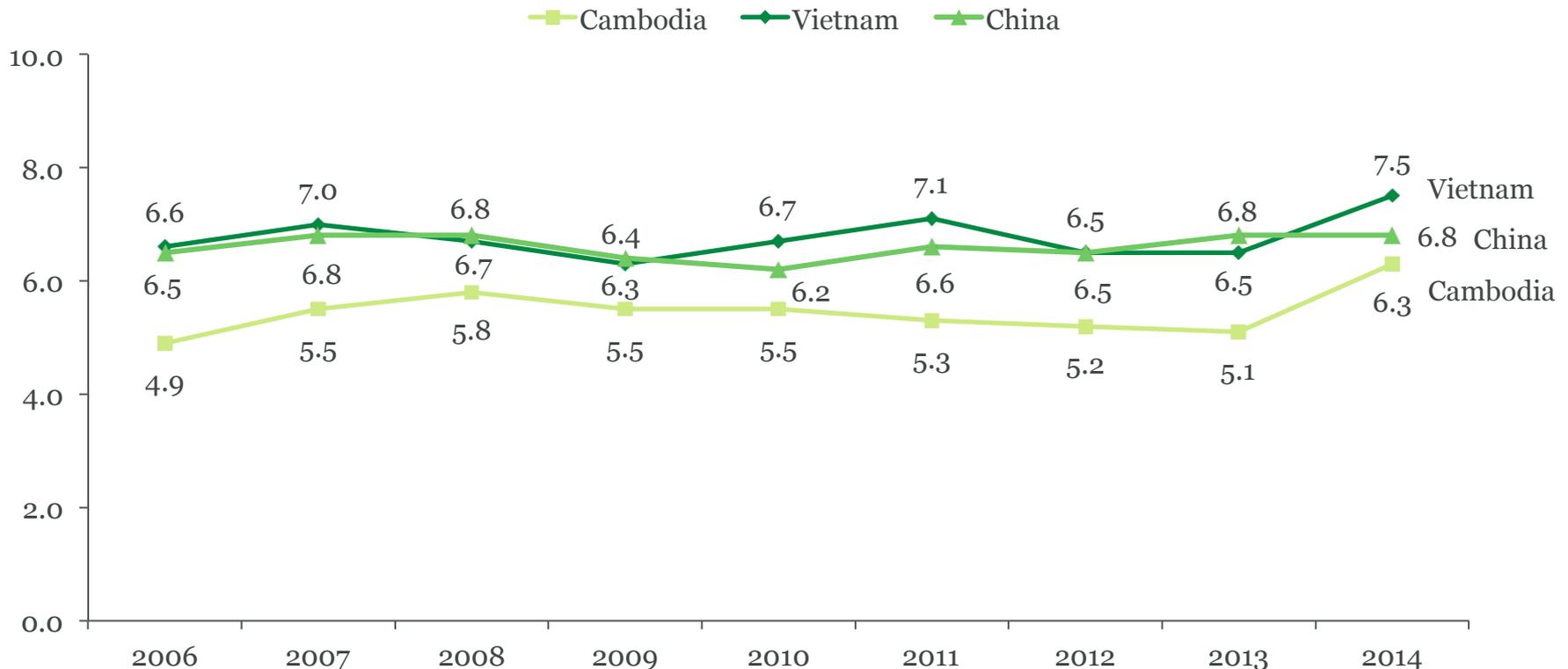
Vietnamese satisfaction with present life is largely unchanged; Chinese have seen an increase

Please imagine a ladder with steps numbered from zero to 10. On which step would you say you currently stand?



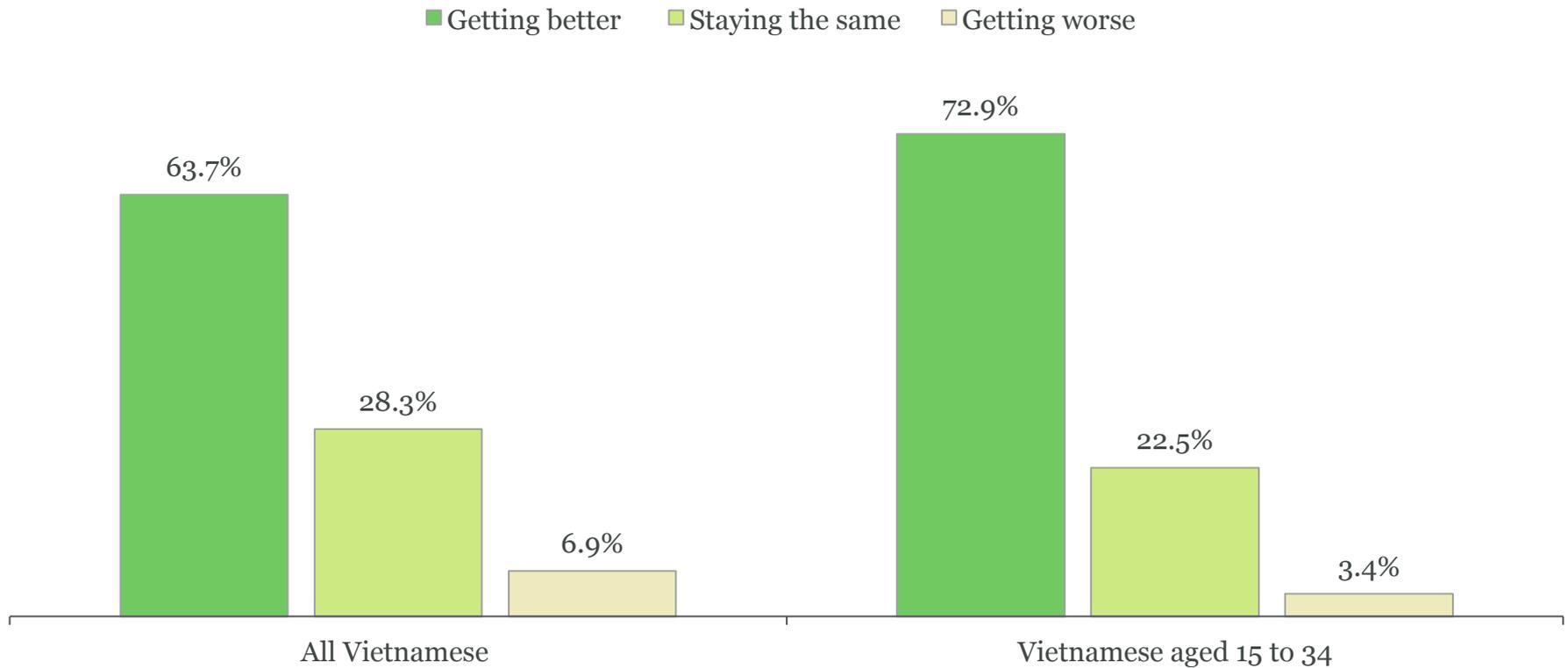
Vietnamese as optimistic about the future as the Chinese

Please imagine a ladder with steps numbered from zero to 10. On which step do you think you will stand five years from now?



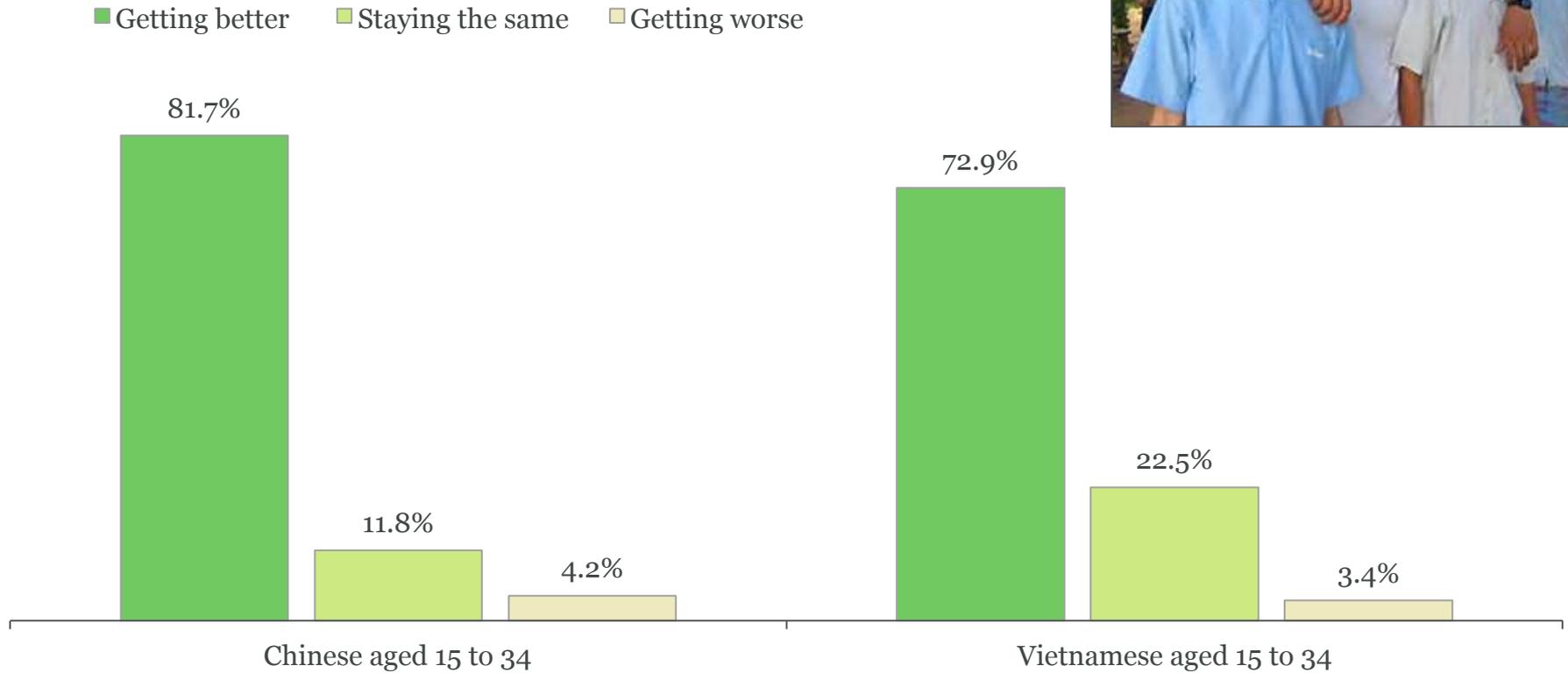
Most Vietnamese say their living standards are improving

Right now, do you feel your standard of living is getting better or getting worse?



Vietnamese youth are equally positive about momentum on standard of living

Right now, do you feel your standard of living is getting better or getting worse?

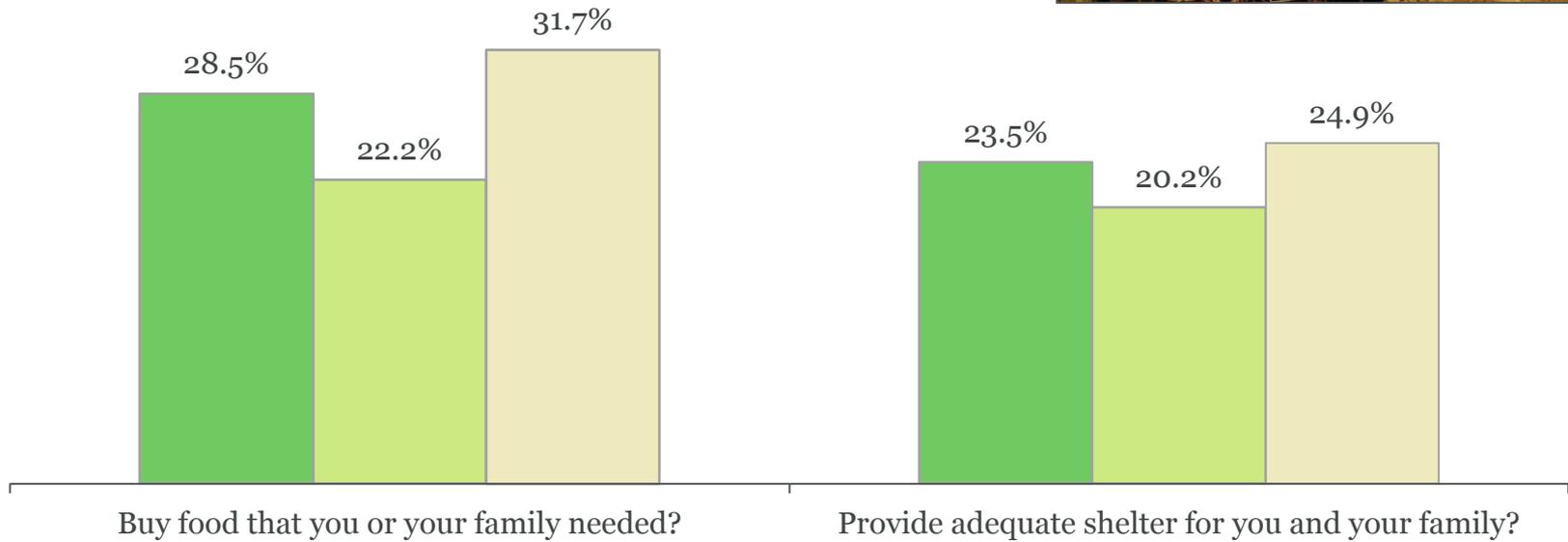


However, poverty remains a problem; many still have trouble paying for basic needs

Have there been times in the past 12 months when you did not have enough money to _____ ?



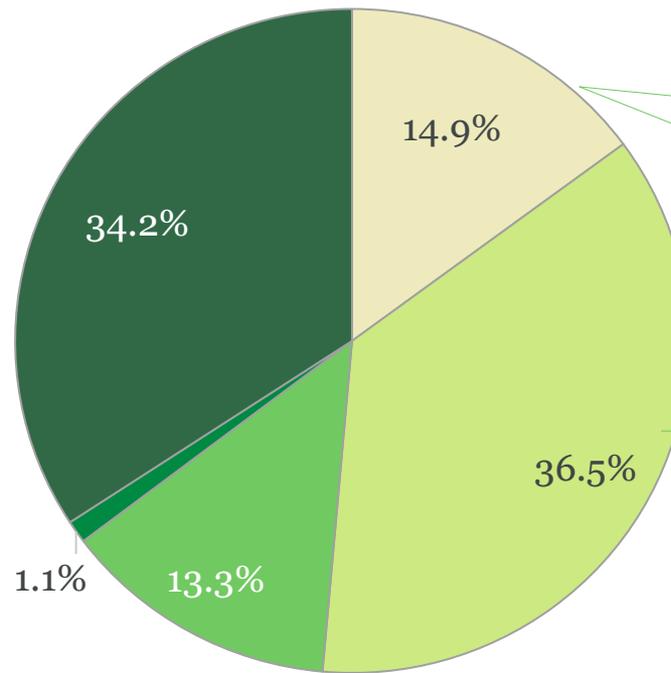
■ Total ■ Urban ■ Rural



Full-time self employment is the main source of livelihood

2014

■ Full-time for employer ■ Full-time for self ■ Part-time ■ Unemployed ■ Not in workforce

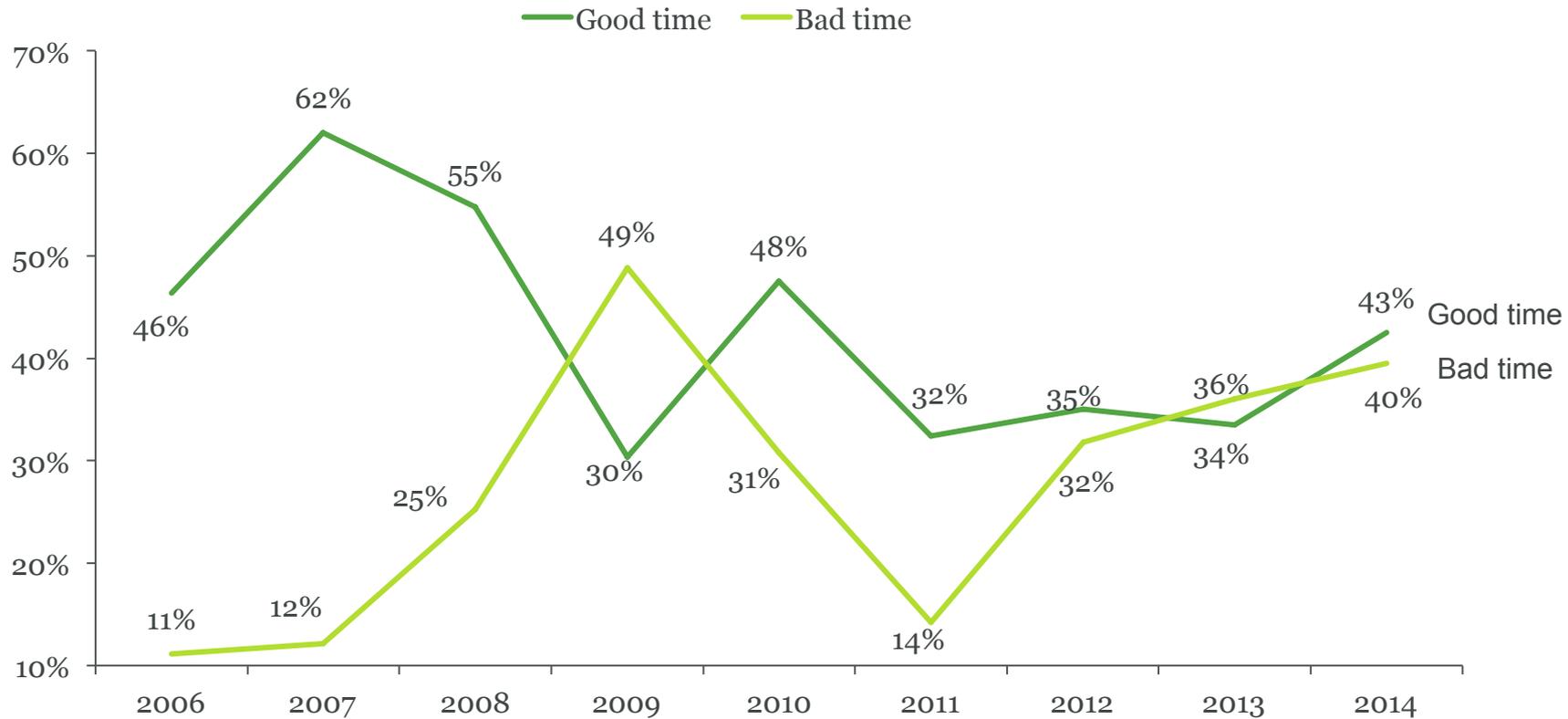


30% worried about losing their job

11% worried about losing their livelihood

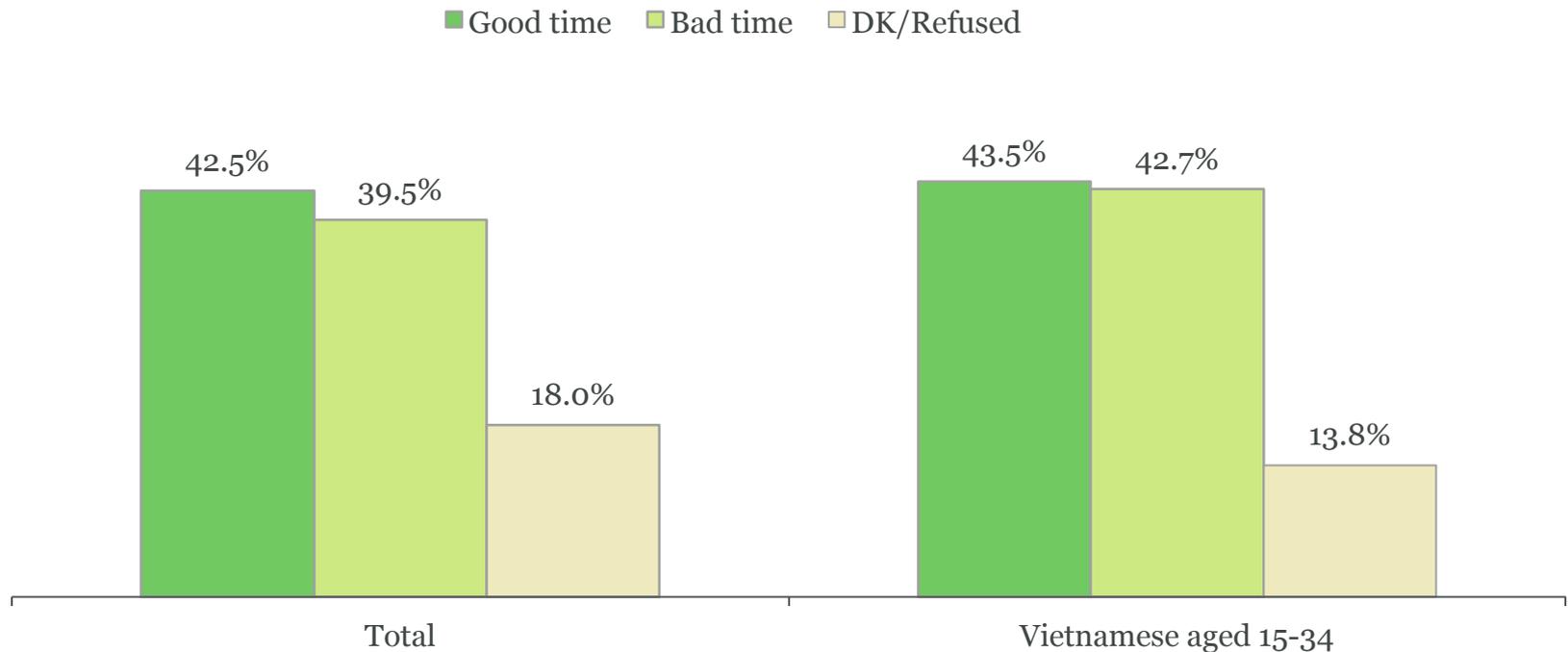
Optimism about finding a job is still lower than pre-economic crisis levels

Thinking about the job situation in the city or area where you live today, would you say that it is now a good time or a bad time to find a job?



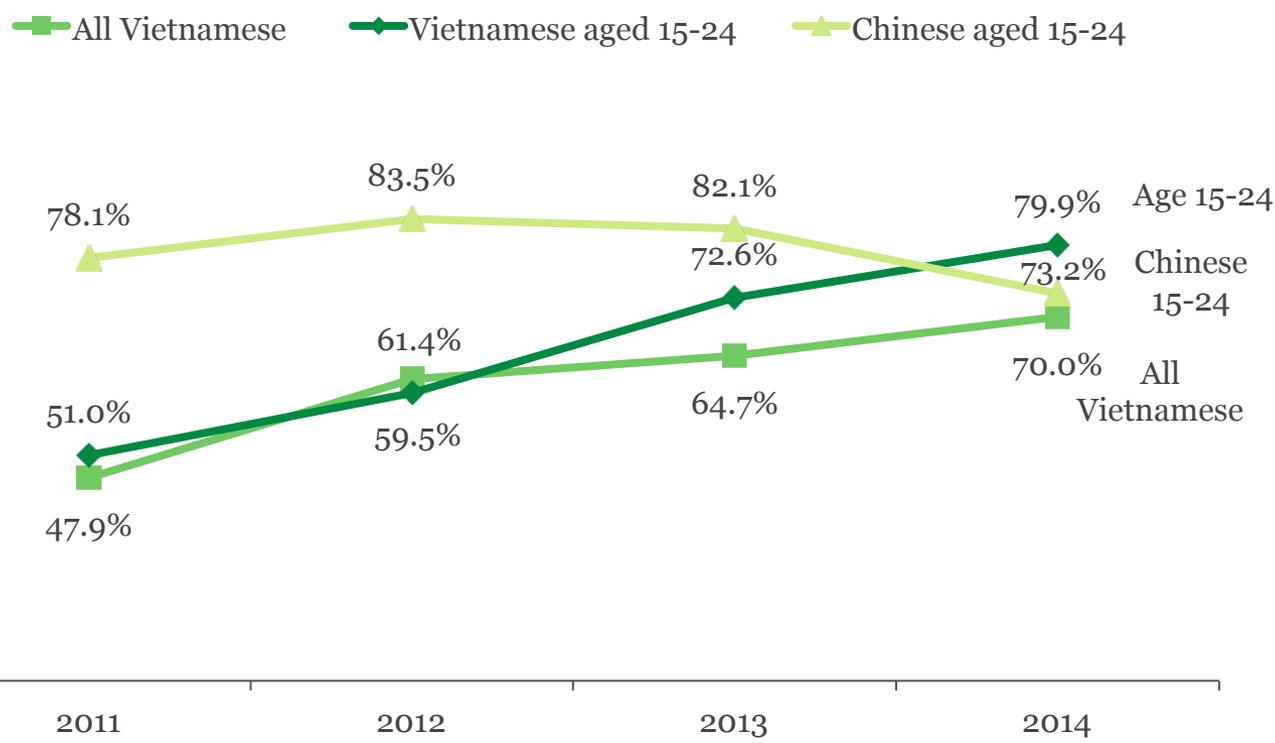
Youth optimism is unchanged for finding a job in 2014

Thinking about the job situation in the city or area where you live today, would you say that it is now a good time or a bad time to find a job?



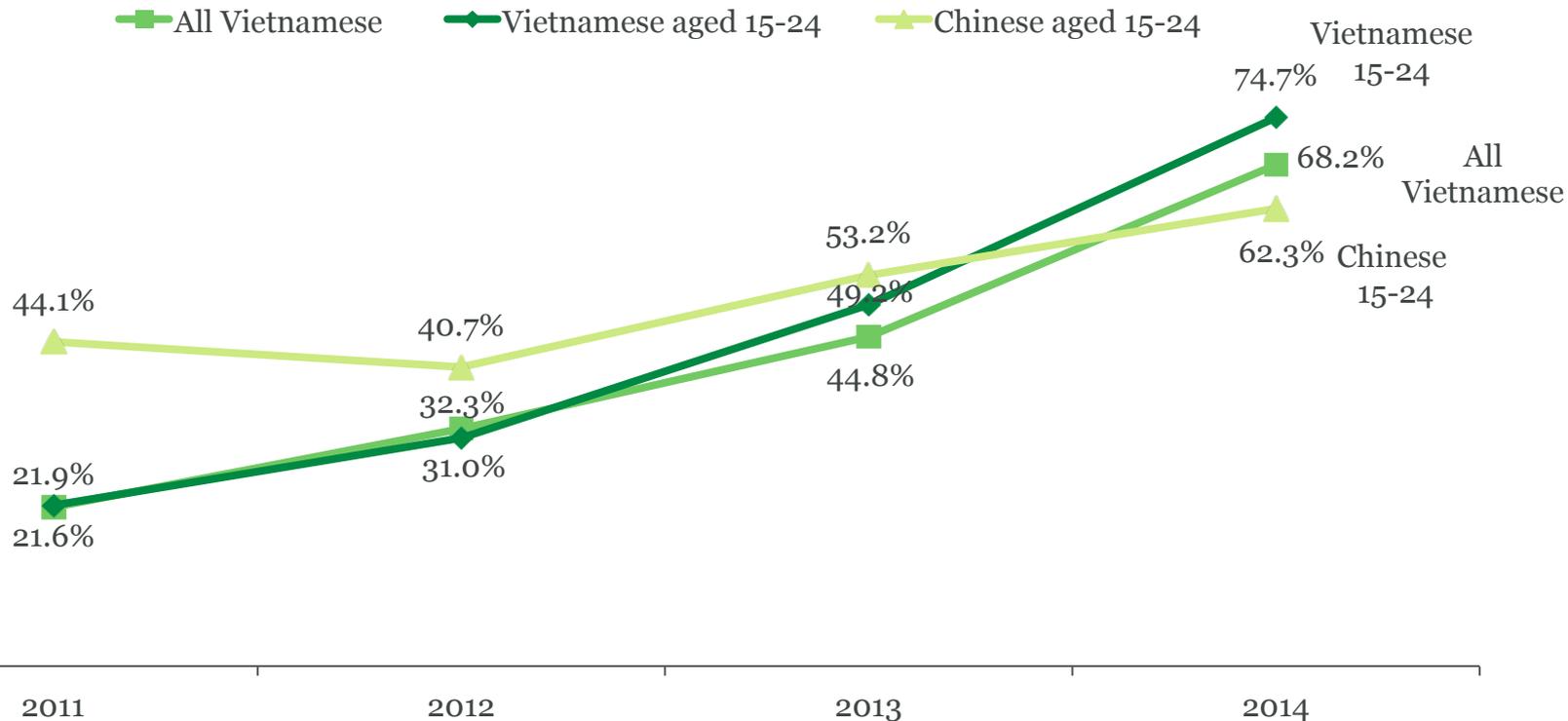
Positive views of business owners have been rising sharply and are particularly high among young Vietnamese

In Vietnam, are people who run their own businesses considered good role models for youth, or not? Percentage “yes, good role models.”



The proportion of Vietnamese who prefer to take a risk and build their own business has shot upward since 2011

Do you agree or disagree with the following statement: You would rather take a risk and build your own business than work for someone else.



Media Use in Vietnam

National Survey Background

- Face-to-face survey of 3,000 randomly selected Vietnamese adults (15+) covering 54 of Vietnam's 63 provinces and municipalities
- Nationally representative of more than 58 million Vietnamese adults
- Excluded some dangerous or very remote minority areas representing less than 15% of the population
- Conducted from January to March 2015



Fieldwork Challenges

- First time using CAPI
- Highly detailed questionnaire
- In the field, administration took 20 to 99 minutes
- Average: 35 minutes
- 83.8% response rate
- Small number of sampling units needed to be replaced – lack of access and danger
- Logistical challenges



Media Environment

Photo: AFP



Photo: AFP



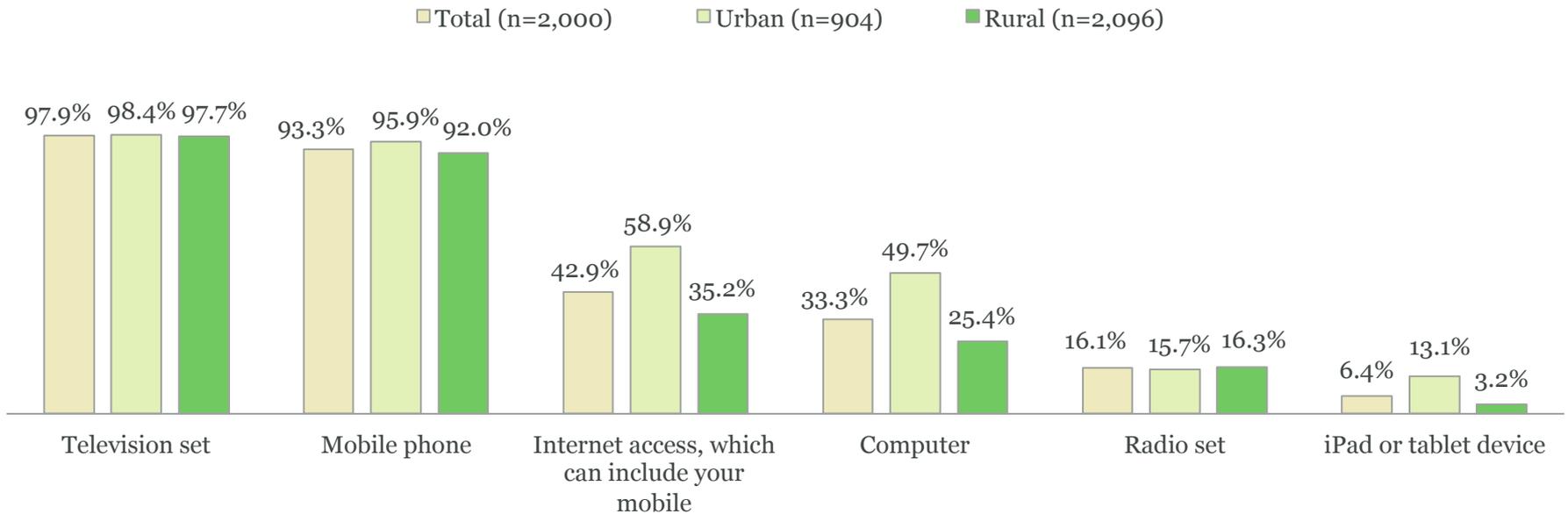
Photo: RFA



Photo: AFP

TV ownership is universal; mobile is close behind

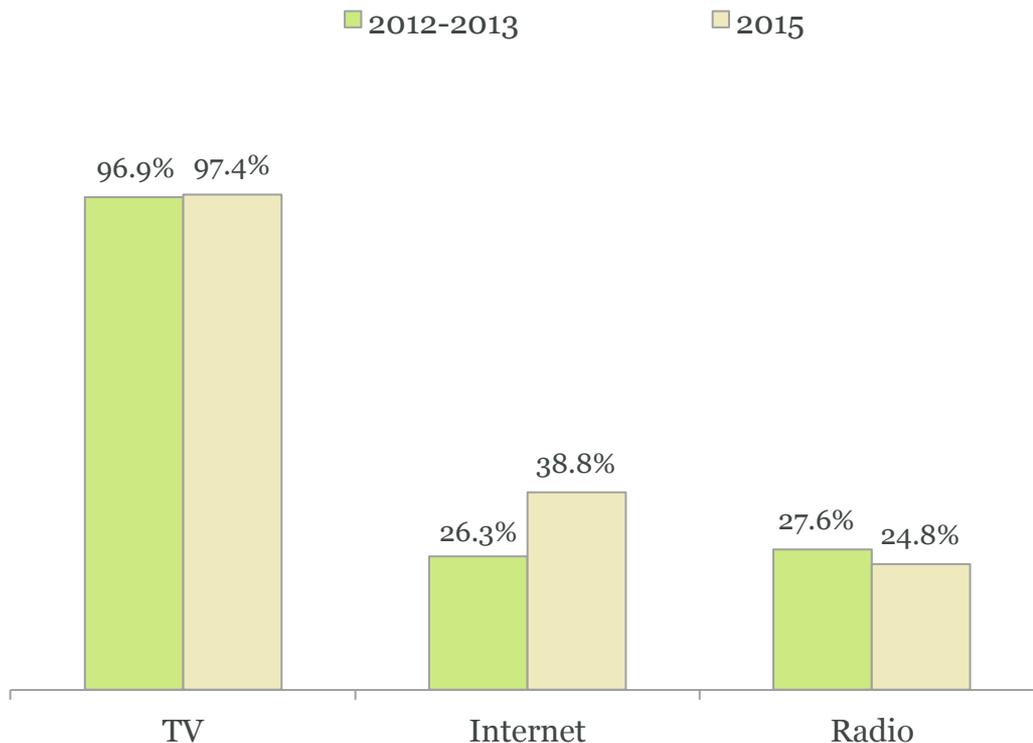
Which of the following do you have working in your household?



- TV ownership is identical to 2012
- Mobile ownership has grown by 10% since 2012; it was just over 50% in 2008
- Radio ownership is down from 21.2%; Internet is up, but asked differently in 2012

TV remains most used media; Internet use is growing

Percentages of Vietnamese adults who use TV, Internet and radio at least weekly



- 60% of urban TVs receive signals from cable
- Antennas and satellite dishes are more common in rural areas; almost all dishes are one meter or less
- Radio use is equally common in urban and rural areas, but trends upward with education
- Listening to the radio on mobile phones is almost as common as listening on a radio set

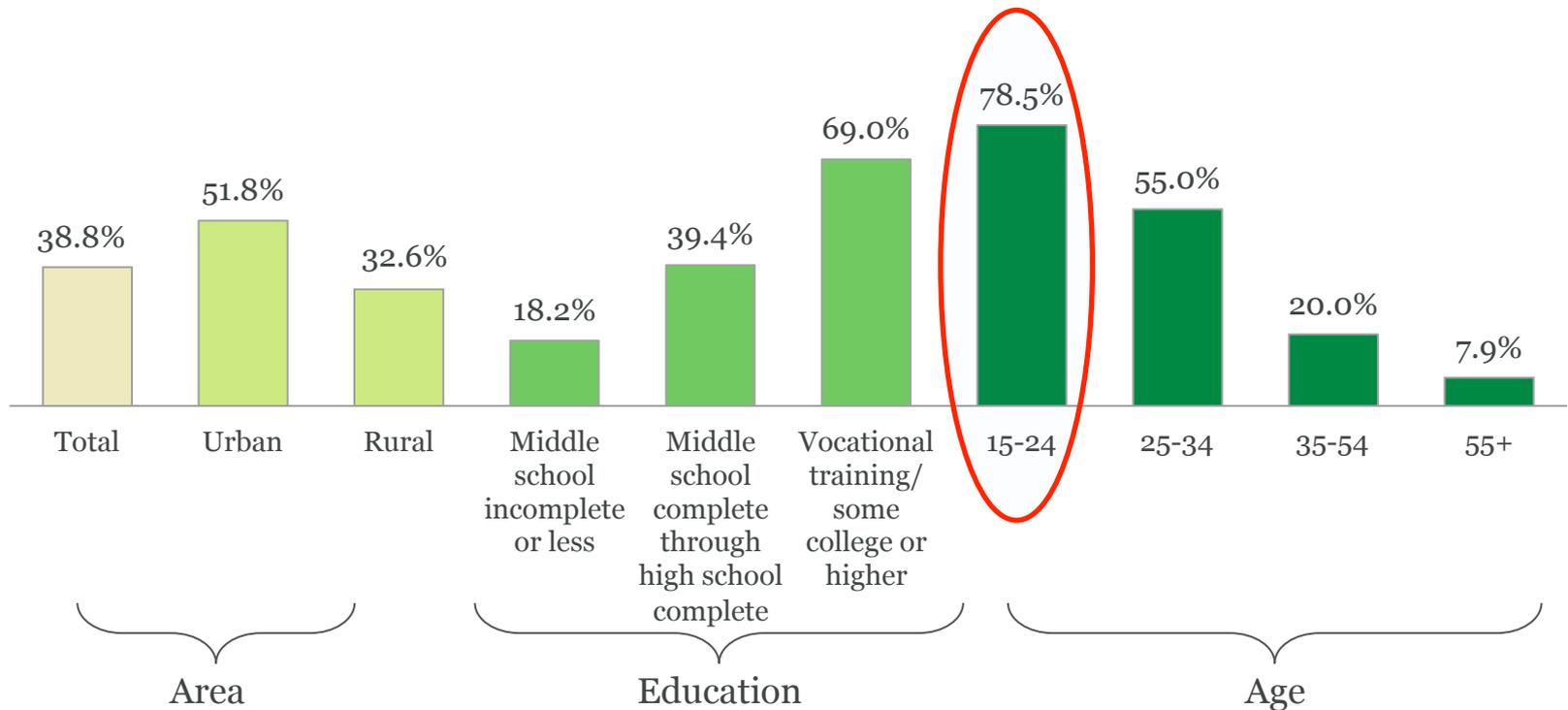
Mobile dominates the Internet in Vietnam

These are the access details among weekly Internet users and respondents overall.

		Weekly Internet Users (n=1,061)	All Respondents (n=3,000)
Devices	Mobile phone	80.5%	31.3%
	Desktop computer	45.5%	17.7%
	Laptop computer	26.5%	10.3%
	Tablet device, e.g., iPad, Google Nexus or Galaxy Tab	9.8%	3.8%
Languages	Vietnamese	99.4%	40.7%
	English	16.0%	6.4%
	Chinese	0.8%	0.3%

Youngest and most highly educated use Internet more

When was the last time that you used the Internet? The Internet could have been accessed using a computer, tablet, or a mobile phone, using social media sites such as Facebook or Viber, or using mobile apps. (Used in the last seven days.)



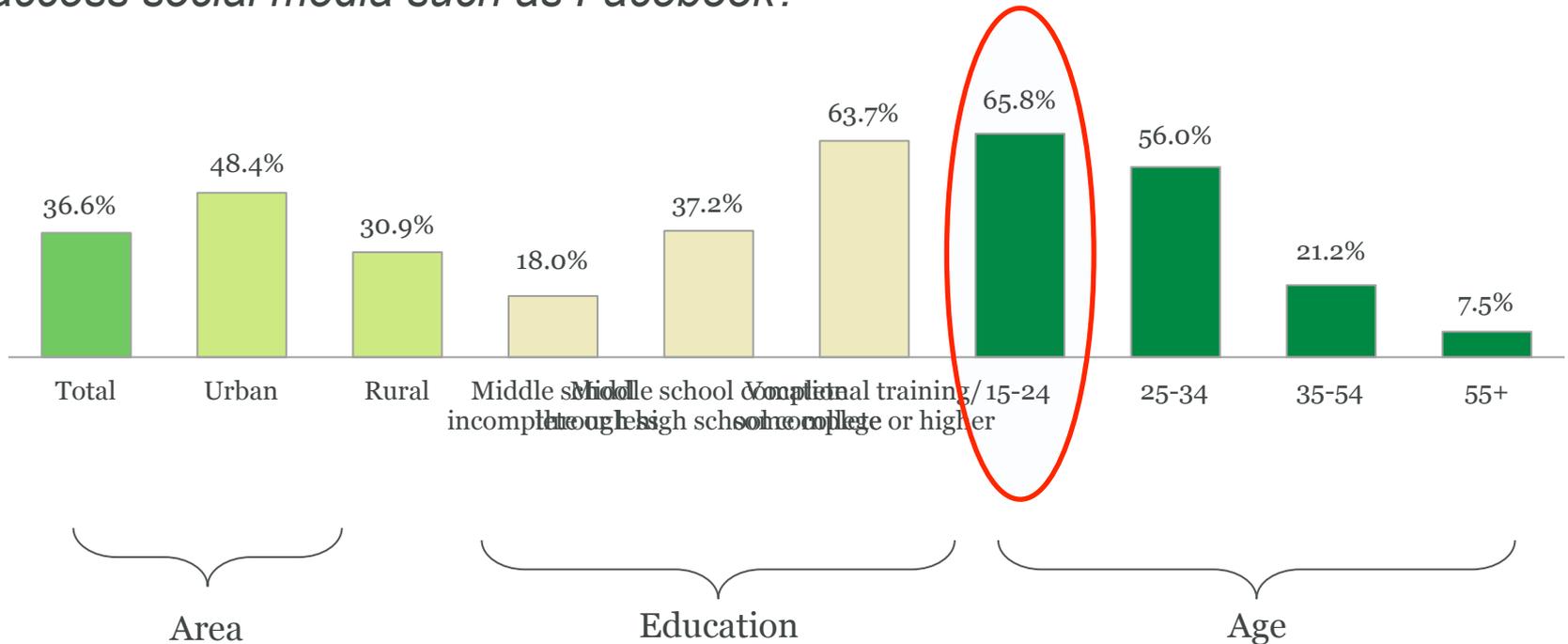
Large secondhand market spreads mobile ownership



Photos: RFA

Youngest cohort has the most advanced phones

Do you have a mobile phone that only receives calls and text messages, or do you own one that connects to the Internet, has mobile apps, or allows you to access social media such as Facebook?



Top Smartphones: Nokia (29.5%); Samsung Galaxy (27.4%); iPhone (14.3%)

Youngest cohort fuels mobile Internet

Percentage among all Vietnamese adults who have used a mobile phone for each function in the past week.

	Total (n=3,000)	Age 15-24 (n=429)	Age 25-34 (n=713)	Age 35+ (n=1,858)
Made/received a phone call	87.9%	89.6%	95.0%	84.2%
Sent/received SMS	70.9%	86.2%	87.9%	57.5%
Accessed the Internet	31.1%	62.4%	48.0%	11.2%
Listened to the radio	10.8%	20.6%	13.2%	5.7%

International giants are very widely used, especially by young people

Which of the following Internet or mobile services have you used in the past seven days on any computer or mobile device?

	Total Vietnamese Population (n=3,000)	Age				Total Vietnamese Population (n=3,000)	Age		
		15-24 (n=429)	25-34 (n=713)	35+ (n=1,858)			15-24 (n=429)	25-34 (n=713)	35+ (n=1,858)
Google	35.3%	71.3%	50.1%	14.4%	Zing me	18.5%	47.4%	25.8%	3.8%
Facebook	29.9%	72.8%	40.9%	7.8%	Zalo	18.4%	40.5%	29.3%	4.8%
YouTube	27.0%	59.7%	39.9%	8.2%	Yahoo!	7.9%	17.2%	11.9%	2.4%

- There was evidence of Facebook blocking beginning in 2009, but not anymore.
- In 2013, Vietnam passed a law banning anti-government content on social media.

Local companies – Zalo and Zing are making headway



- Both owned by ZNG Corporation, originally a gaming company
- Zalo: Chatting app, very cute emoticons, first messaging app preloaded on Nokia phones, 2G, 3G and 4G; aggressive marketing campaign
- Zing: More traditional social network; it was created in 2009



Photo:
TechInAsia

Applications for same brands most used

What three mobile phone software apps do you use most frequently? Results among Vietnamese who say they use mobile apps. (n=830)

	First Response	Included Among Three Responses
Facebook	47.3%	71.9%
Google	16.0%	40.0%
Zalo	13.2%	44.6%
YouTube	3.0%	20.2%
Zing/Zing Me	1.6%	11.7%

- China's giant app WeChat was barely mentioned.

News and Opinions



Photo: AFP



Photo: AFP



Photo: Adhoc



Photo: Mywork.com.vn

New media age gap extends to news gathering

Percentage who use each method/platform for news at least weekly.

	Total (n=3,000)	Age 15-24 (n=429)	Age 25+ (n=2,571)
TV	95.8%	93.7%	96.4%
Friends/relatives	74.7%	78.3%	73.7%
Mobile	48.1%	69.1%	42.1%
Internet	37.9%	72.9%	27.9%
Radio	21.3%	25.2%	20.2%
Print media	19.3%	20.2%	19.0%

Young Vietnamese news sources are more diverse and digital...

What are your three MOST important specific sources of news and information?

	Percentage Naming Source as Their First Response, Total Population (n=3,000)	Percentage Naming Source Among Their Three Possible Responses			
		Total Population (n=3,000)	Age 15-24 (n=429)	Age 25-34 (n=713)	Age 35+ (n=1,858)
VTV	43.9%	64.8%	48.6%	58.4%	74.1%
Your provincial TV station	16.0%	29.0%	22.8%	29.6%	31.4%
Vietnam Television Corporation (VTC)	9.9%	14.5%	8.2%	14.1%	17.2%
Ho Chi Minh City TV (HTV)	7.6%	12.8%	11.8%	12.6%	13.3%
24 Gio	2.6%	7.7%	16.6%	12.7%	1.9%
Ho Chi Minh City Television Choice Center (HTVC)	7.6%	7.6%	5.7%	7.9%	8.2%
Facebook	0.1%	4.7%	15.2%	4.6%	0.4%
Dantri.com.vn	0.9%	4.2%	5.0%	6.4%	2.9%
Kenh14.vn	3.4%	4.0%	14.6%	2.8%	0.2%
Zing	1.2%	3.2%	11.4%	2.6%	0.2%

... and South China Sea and environment top concerns

Please tell me what, in your opinion, are the three most serious problems facing Vietnam.
 Asked on an open-ended basis; most commonly mentioned problems.

	Percentage naming each problem as their first response			
	Total Population	Age 15-24	Age 25-34	Age 35+
Chinese territorial claims (i.e., South China Sea)	16.8%	17.3%	19.4%	15.6%
Crime/lack of safety	11.2%	9.6%	13.1%	7.3%
Environmental problems	8.5%	11.7%	7.3%	7.7%
Poverty	5.9%	2.8%	3.9%	8.2%
Unemployment/lack of jobs	5.6%	8.1%	7.5%	3.8%
Corruption	4.4%	2.3%	2.4%	6.0%
Education	3.3%	9.2%	2.3%	1.4%
Increasing food prices	3.0%	1.1%	3.9%	3.4%

Young Vietnamese close to their elders on key issues

Please tell me your level of agreement with each statement. Percent “strongly agree.”

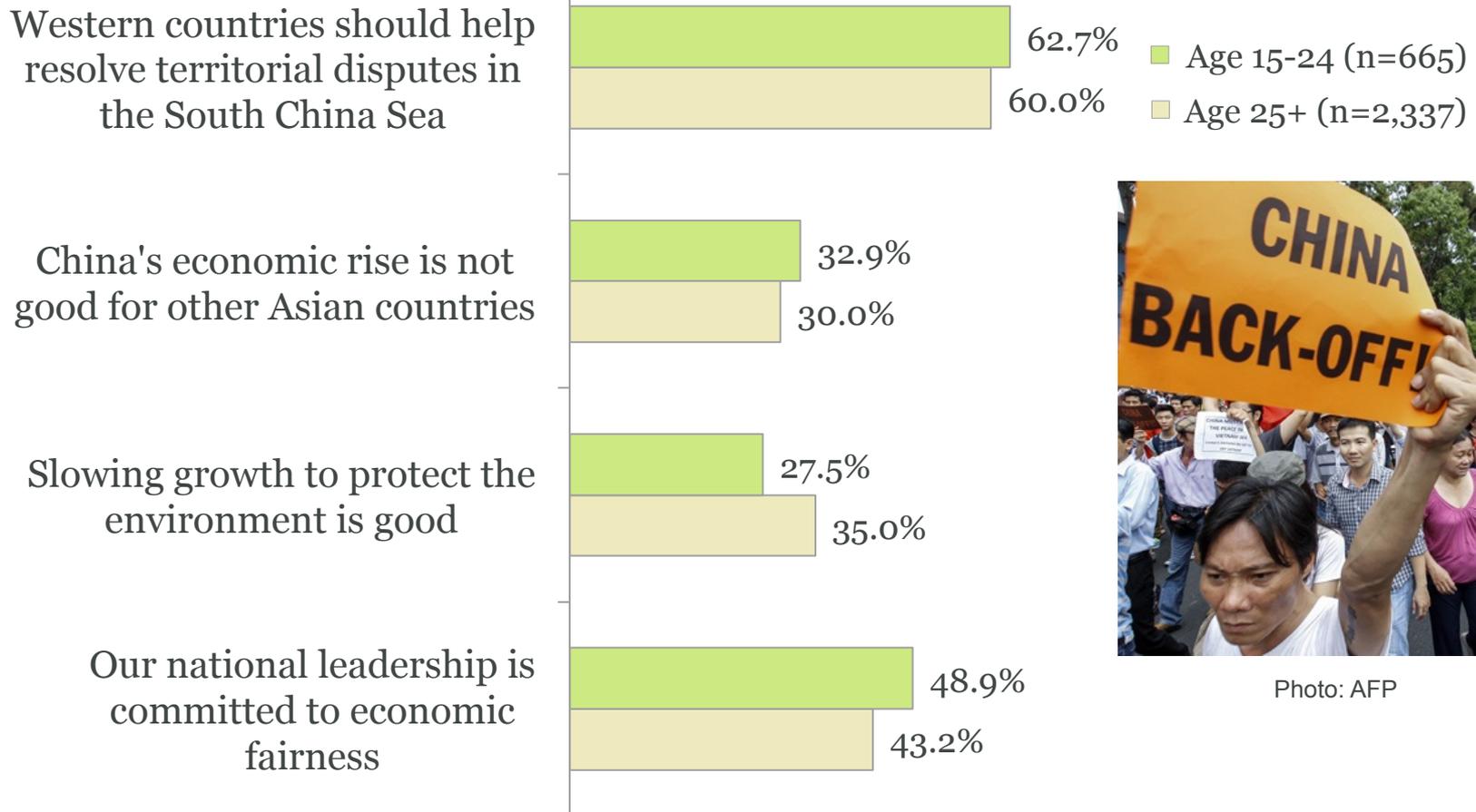


Photo: AFP

Young Vietnamese are more open to non-official news

Please tell me your level of agreement with each statement. Percent “strongly agree.”

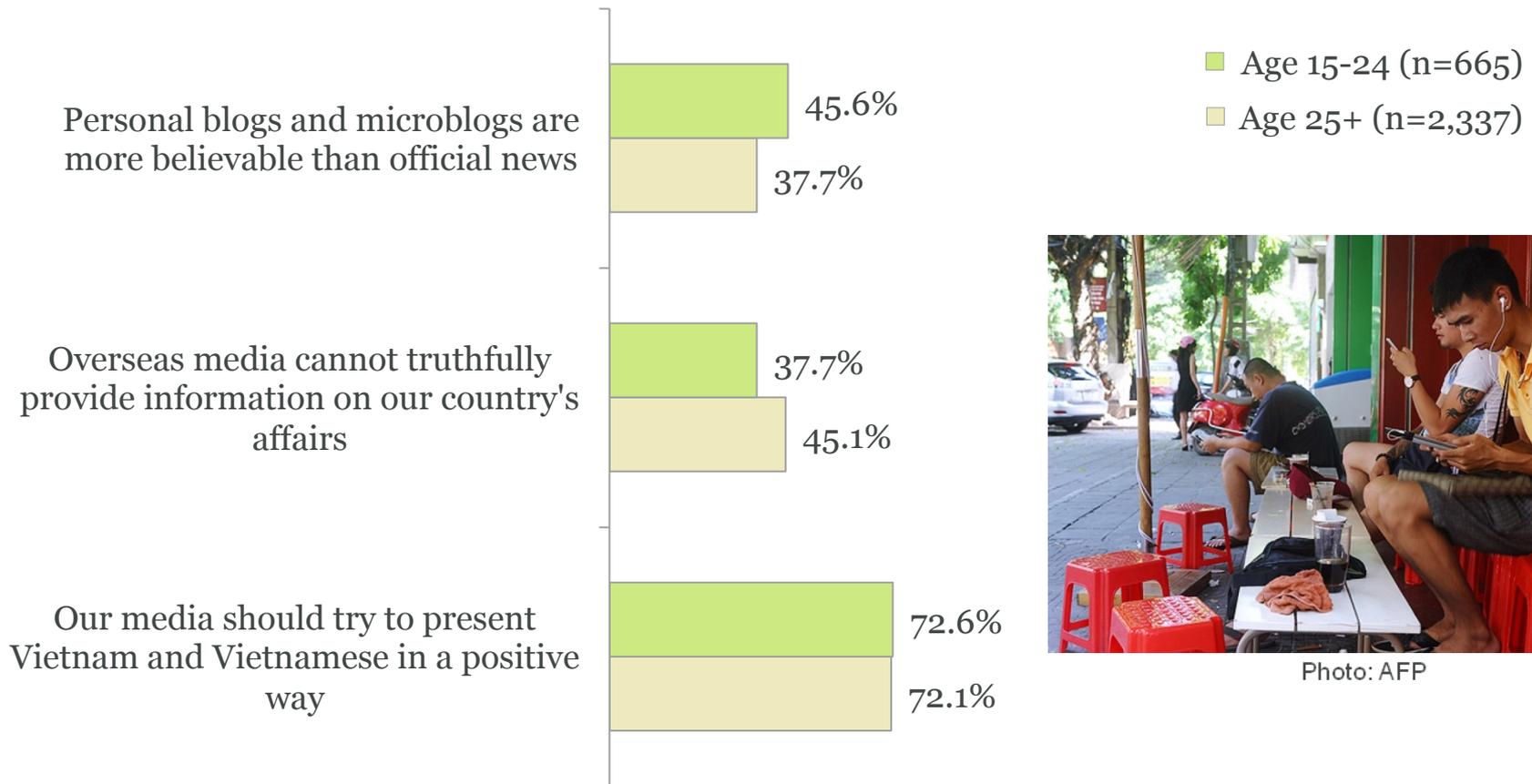


Photo: AFP

Conclusions

- Vietnam has a highly engaged, optimistic and entrepreneurial population and a rapidly changing media environment.
- Television remains the most used medium and the top source for news and information – especially from official TV.
- Vietnam severely restricts its news media but Vietnamese want their media to present the country and its people in a positive light.
- Vietnamese adults tend to say they trust blogs more than official news, though serious blogging is very risky.
- Young people are pushing digital media forward by what they own and what they do digitally. Mobile is the dominant platform.
- Google, Facebook and YouTube are very widely used.
- Across demographic segments, conflicts in the South China Sea are seen as Vietnam's most serious problem and Vietnamese overwhelming support of Western involvement in resolving this issue.



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