



# **CUSTOMER BEHAVIOUR** **4G LTE** **VIETNAM**

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# Customer Behaviour 4G LTE Vietnam 2017

- RESEARCH OBJECTIVES & METHODOLOGY
- BEHAVIOUR & EXPERIENCES
- CUSTOMER SATISFACTION MEASUREMENT
- ANALYSIS AND SUGGESTIONS

**Consists of 8  
questions,  
including 2  
groups of 24  
questions and  
answers.**

**13,828**

Successful Responses  
From 40,000 Samples.

**April 1<sup>st</sup> – July 1<sup>st</sup>**

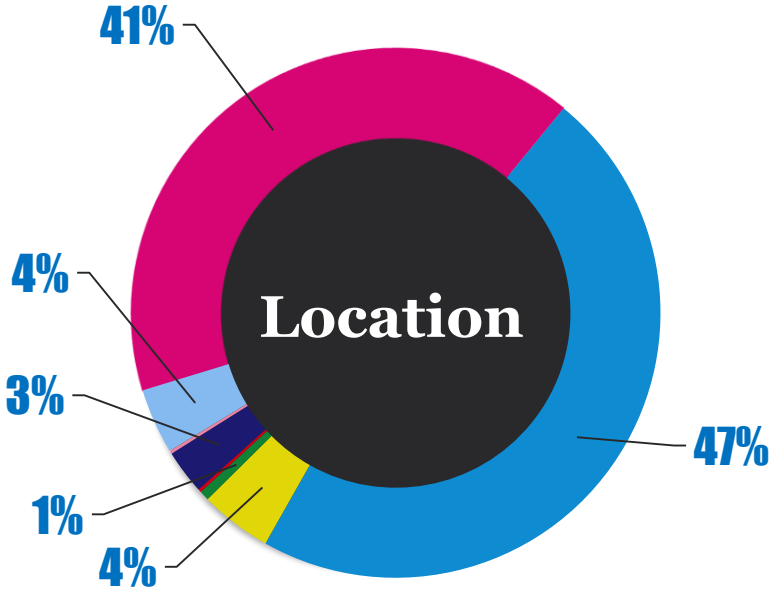
**2017**

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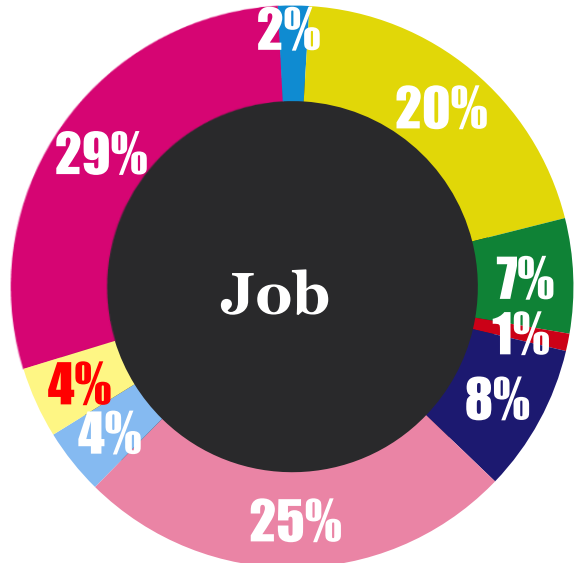
**3 periods**



# Interview results



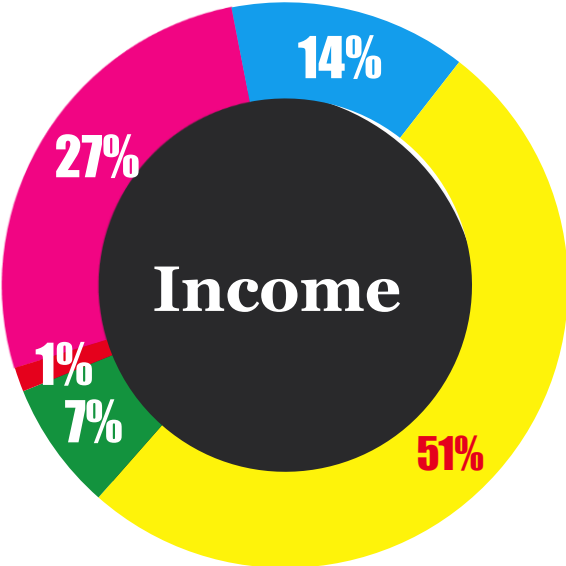
- Ha Noi
- Ho Chi Minh City
- Can Tho
- Hai Phong
- Dong Nai
- Da Nang
- Binh Duong
- Vung Tau



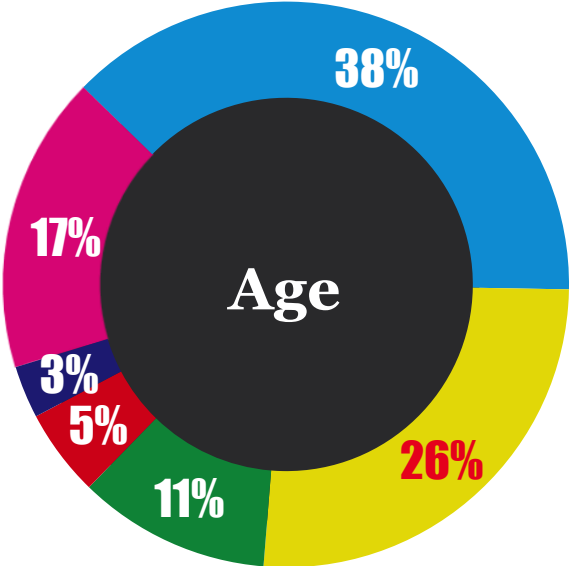
- Student
- House Helper
- Self Employment
- Teacher
- Doctor
- Engineer
- Manual Labour
- Accountant
- Other



# Interview results



- < 3 mil VND
- 3 - 5 mil VND
- 5 - 10 mil VND
- 10 - 20 mil VND
- > 20 mil VND



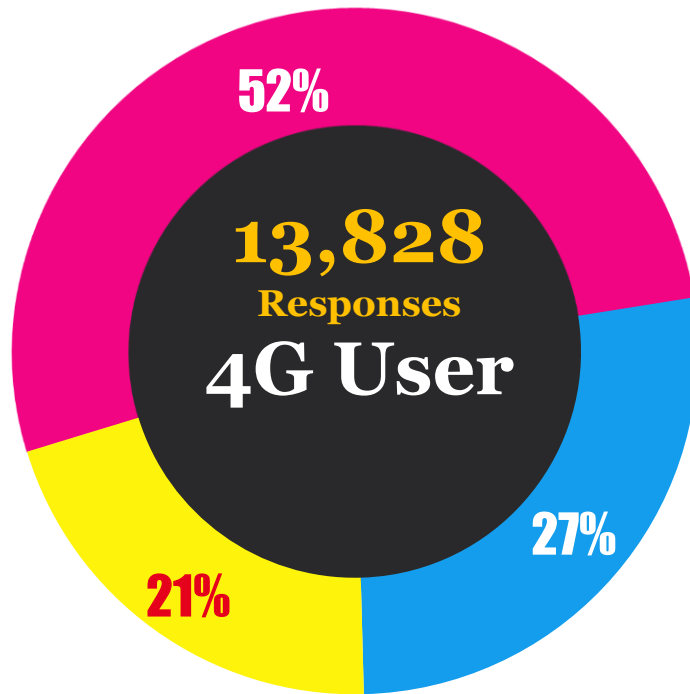
- 15 to 20
- 21 to 30
- 31 to 40
- 41 to 50
- 51 to 60
- > 60



# Who use 4G and numbers ?

- **88%** Hanoi & HCM City
- **74%** Students, Self Emp't & Manual Labor
- **51%** Income 5-10mil VND/monthly
- **38%** Age from 21-30

# Interview results



■ VIETTEL

■ MOBIFONE

■ VINAPHONE



*Trail licensing in 2015 & debut in PhuQuoc/Kien Giang, developing well market in Hanoi from November last year, slow developing 4G Stations but providing high quality @ prime areas. Less than million 4G activated*



*2015 got trial license 4G, efforts to install and implement 4G stations to nationwide, official launch in April. Numbers of new 4 SIM and upgrading cards up to 4million & about 2mil users purchased 4G packages*



*Trial licensing from October 2015, official licensing and changing 4G SIM from July 2016. Strongly growth in HCM City by end of 2016. More than 1 million 4G SIM activated and spent \$ for 4G effectively*



*Got trial license in 2015 from MIC but not ready for providing 4G services yet.*





<p><b>79k\$</b> month 2G, 30' voice free</p>	<p><b>70k\$</b> month 2G</p>	<p><b>70k\$</b> month 2.4G</p>
<p><b>10k\$</b> day 2G</p>	<p><b>10k\$</b> day 300Mb</p>	<p><b>10k\$</b> day 1.5G</p>
<p><b>Regular:</b> 75\$/50Kb</p>	<p><b>Regular:</b> 60\$/1 Mb</p>	<p><b>Regular:</b> 75\$/50Kb</p>

*Price premium is increasing linked to higher speeds & lots more benefits & much more as*

**UNLIMITED VIDEOS ON YOUTUBE  
FACEBOOK FREE WITHOUT BANDWITH...**



# LEVEL OF NEEDS FROM CUSTOMERS ON 4G DATA SPEED

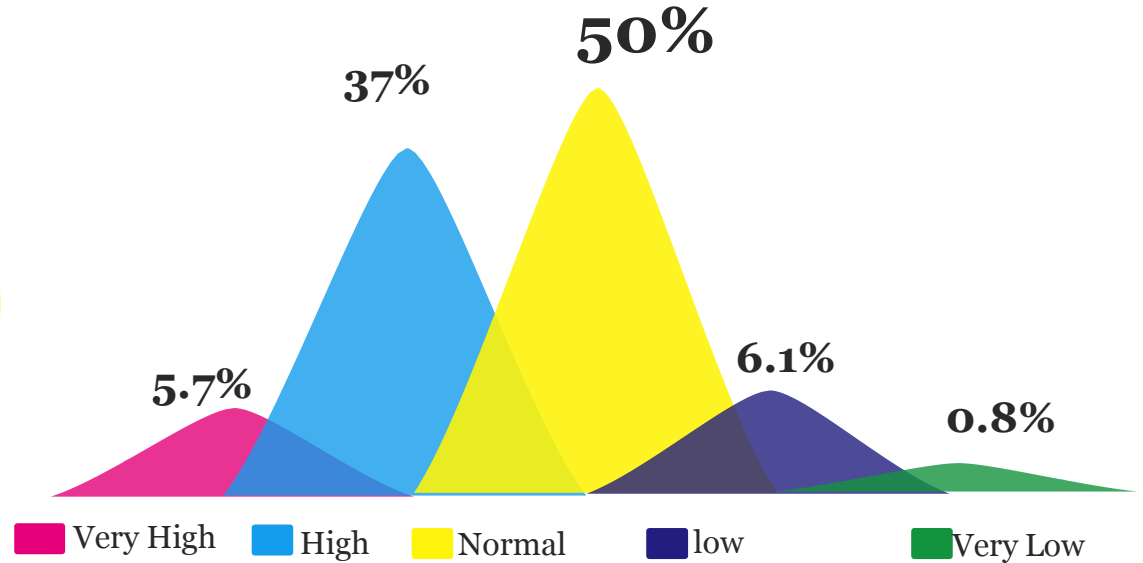
13 828 users commented that 4G services meet their needs as follows:

Most largest 3 groups  
feedback on 4G service  
responded **Very high & High**  
from their requirement/needs:

Student: **52%**

Self employment: **46%**

Manual labour: **35%**

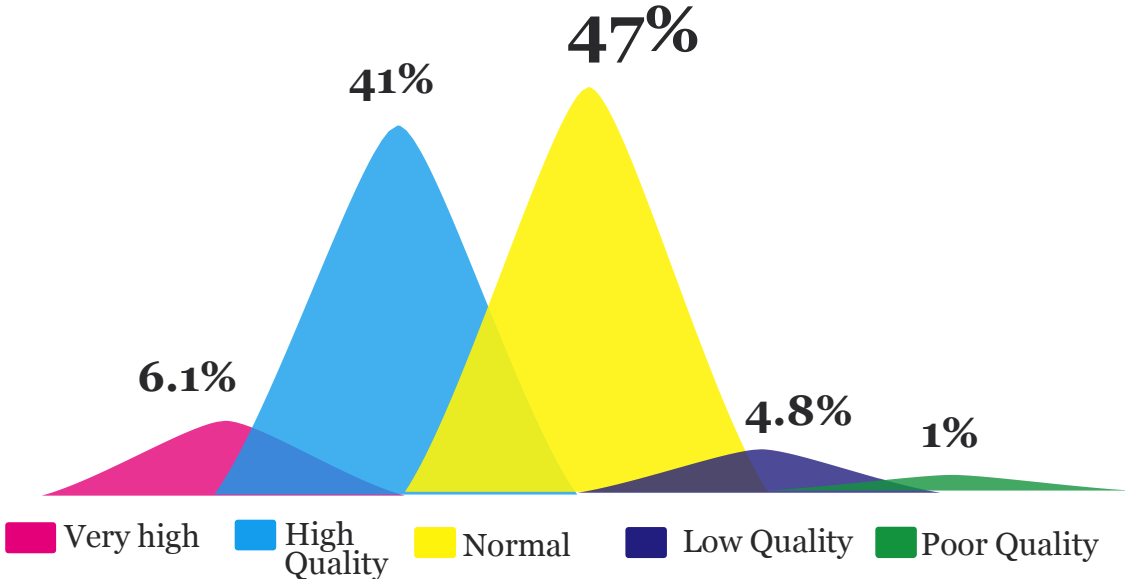


# CUSTOMERS COMMENT ON 4G INTERNET QUALITY

13,828 users comment on 4G quality is as follows:

Quality ratio on 4G services at **High & Very high** from 3 groups:

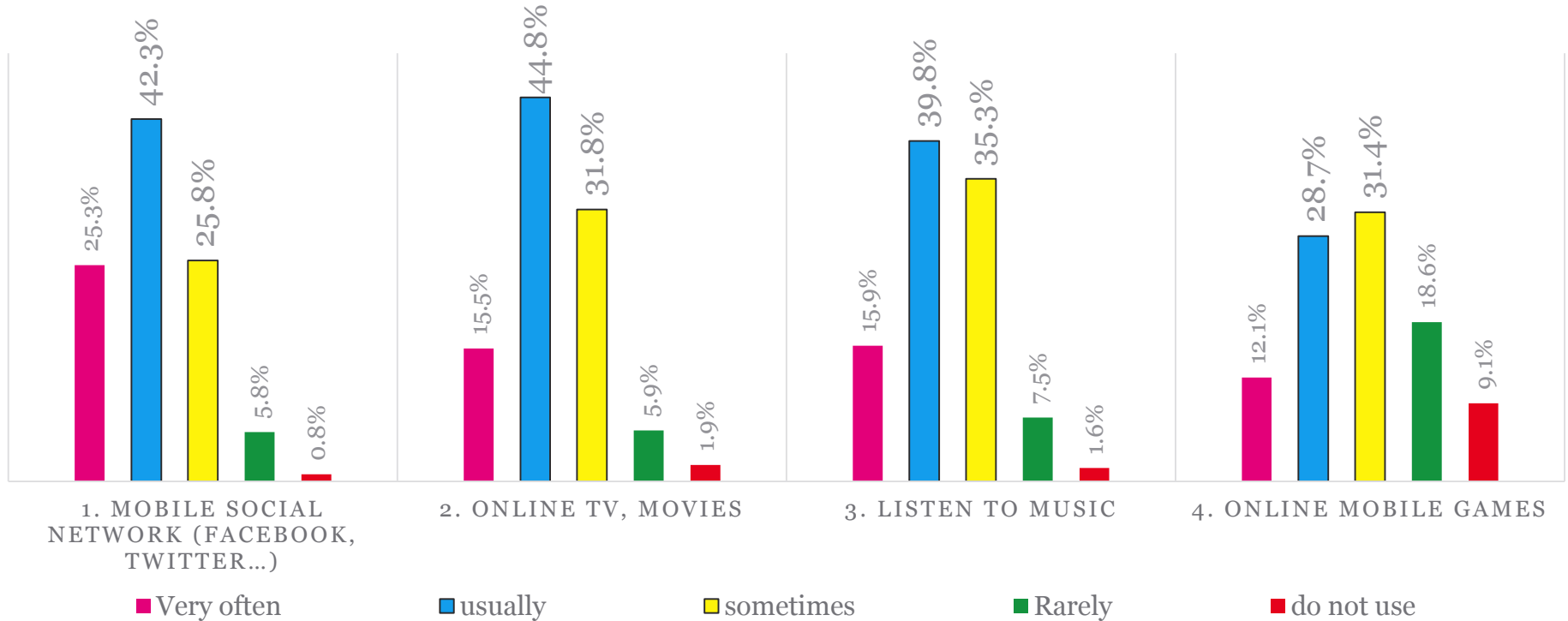
Income 3-5 mil: **55%**  
Self employment: **51.9%**  
Hanoi Area **50.2%**



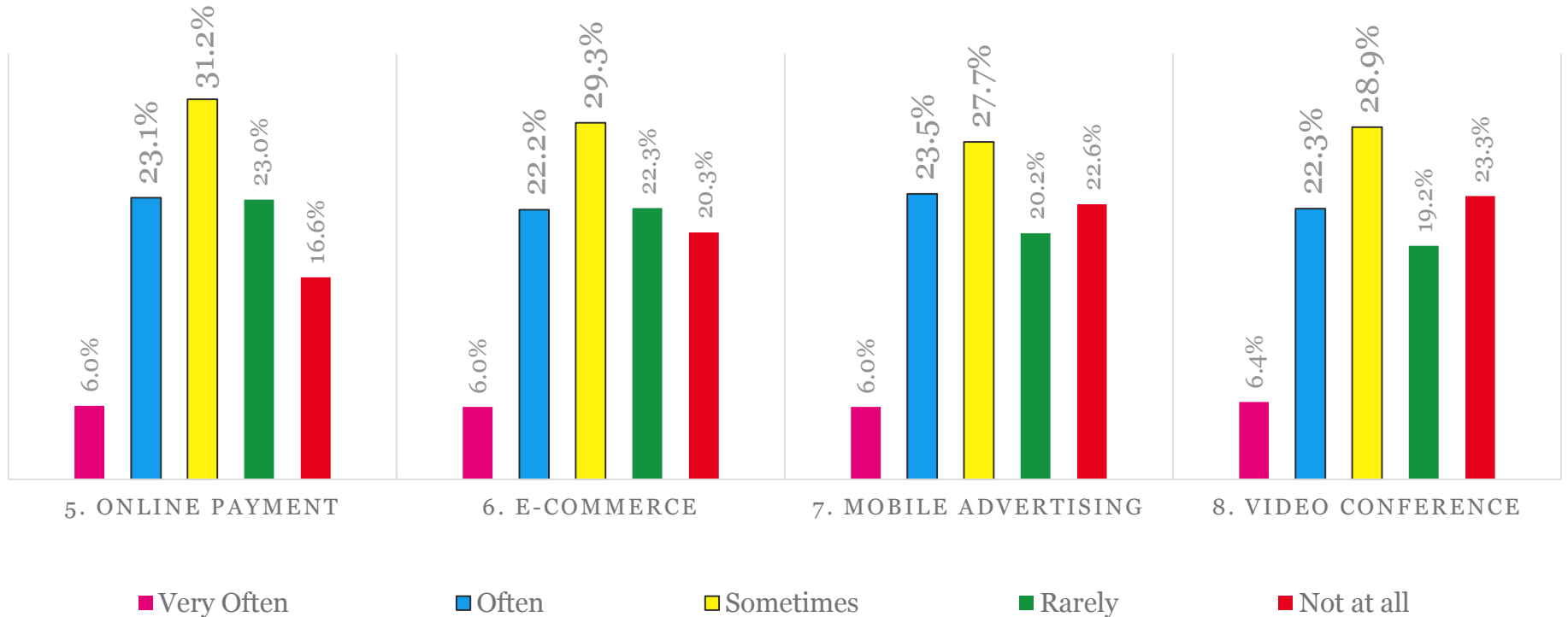
# Customer Behaviour & Experiences



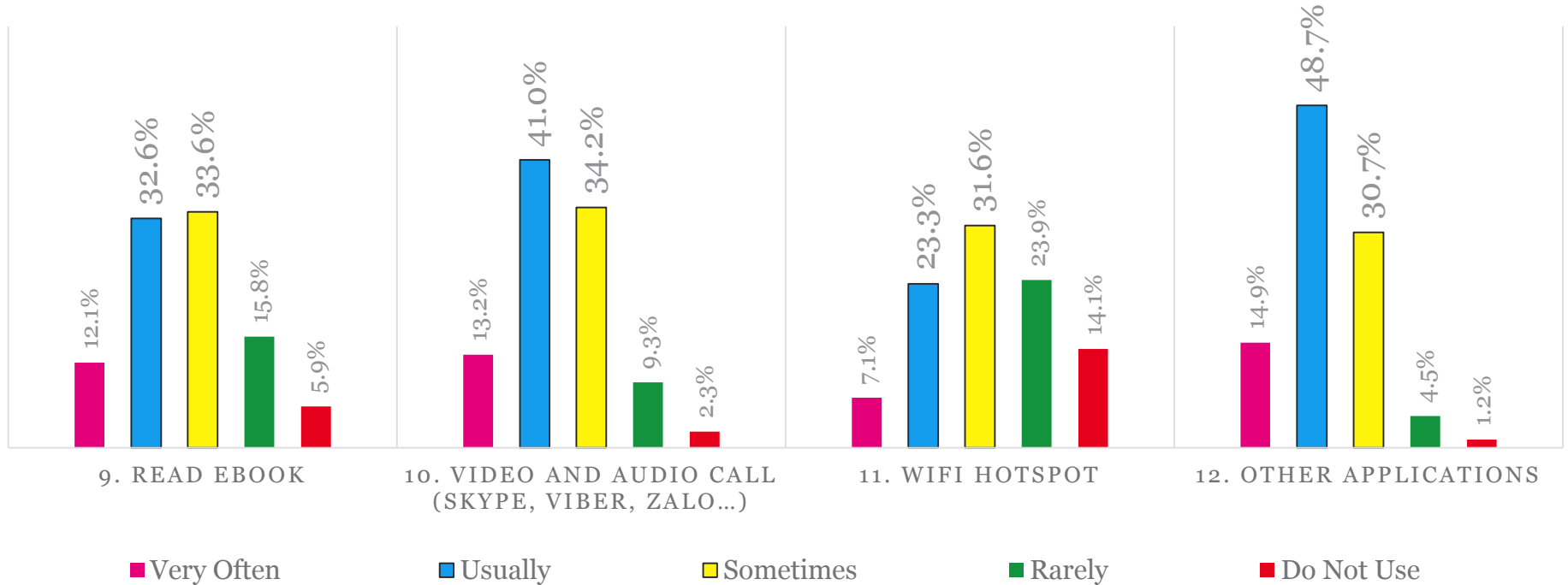
# CUSTOMER BENEFITS AND USAGE ON 4G SERVICES (TABLE 1)



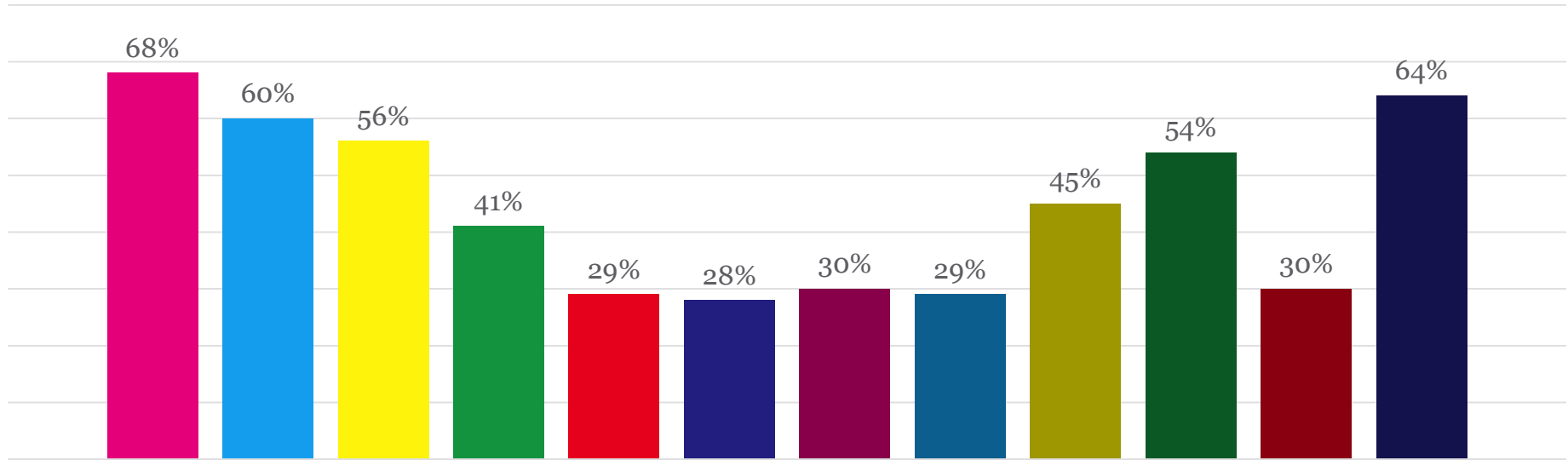
# CUSTOMER BENEFITS AND USAGE ON 4G SERVICES (TABLE 2)



# CUSTOMER BENEFITS AND USAGE ON 4G SERVICES (TABLE 3)



# WHAT BENEFITS & TOOLS USING 4G FOR ?



- Mobile social networks (Facebook, Twitter...)
- Listen to music
- Online payment
- Mobile advertising
- Read ebook
- Wifi hotspot

- Online TV, movies
- Online mobile games
- Mobile commerce
- Video conference
- Video and Audio call (Skype, Viber...)
- Other applications



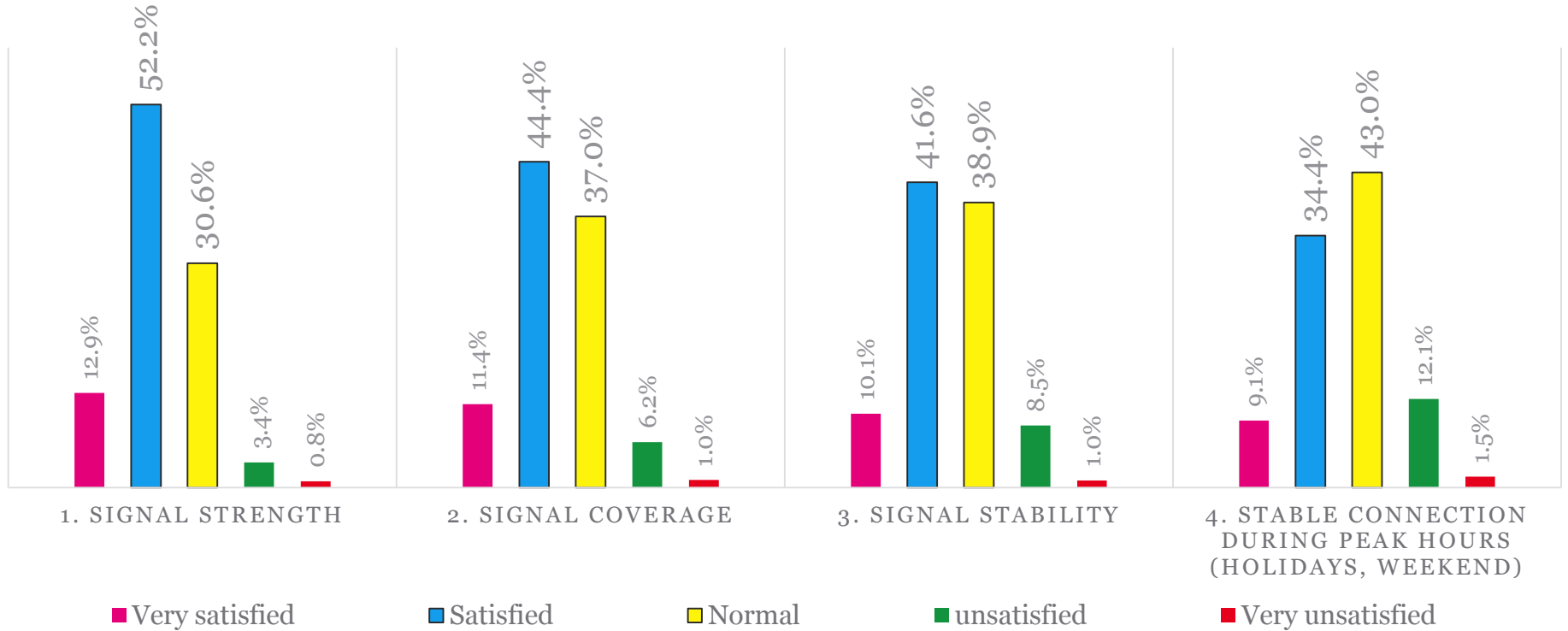


08:08  
Sun, Feb 26

# Customer Satisfaction & Feedbacks



# SATISFACTION MEASUREMENT OF SERVICE CRITERIA 4G (GROUP 1)



# Stability, Stability ... and More Stability

**56%**

Self Employment  
(Deliver, Uber,  
Grab...) are satisfied  
with the stability of  
4G.

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Operators need to improve their quality of signal  
stability to draw 37% of customers “confuse” into  
“fully trusted/Confident” of services

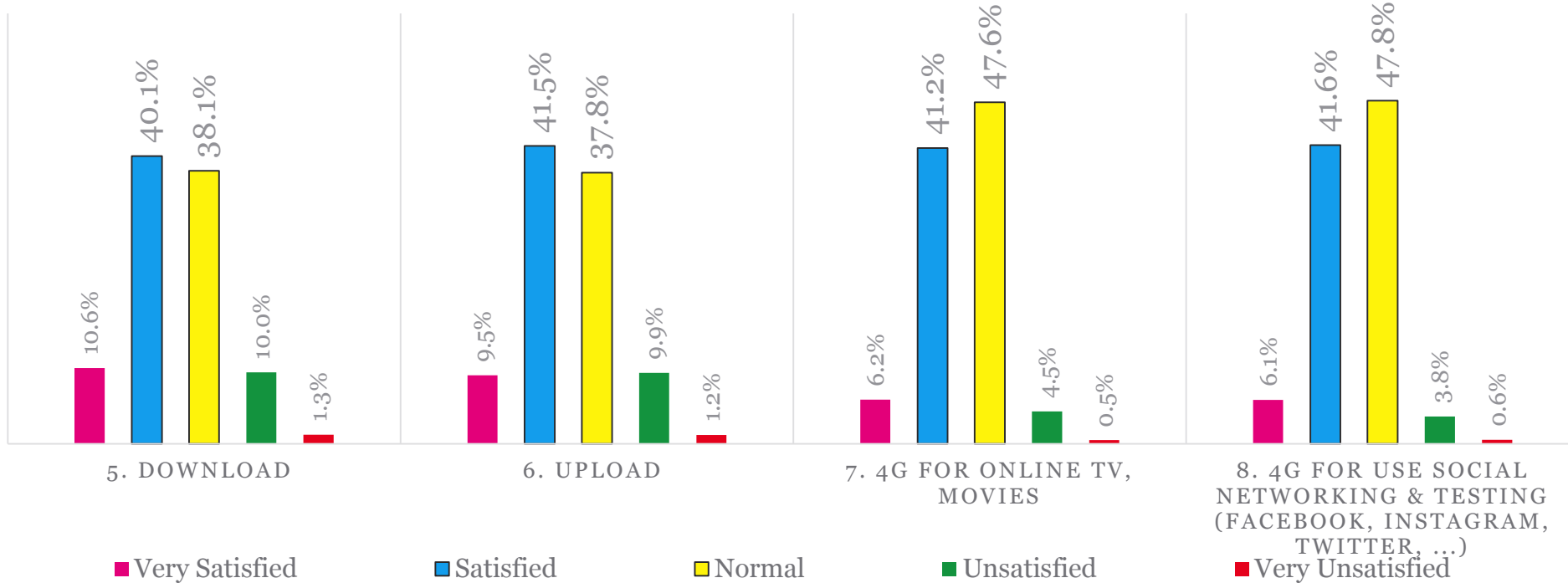
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**7%**

of this sector are  
unsatisfied about the  
stability of 4G.



# SATISFACTION MEASUREMENT OF SERVICE CRITERIA 4G (GROUP 2)



# What do the mobile Gamers / Entertainment say about the 4G speed?

**58%**

of the mobile Gamers/ Entertainment are satisfied and above with the 4G speed.

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33% said “no comments”.

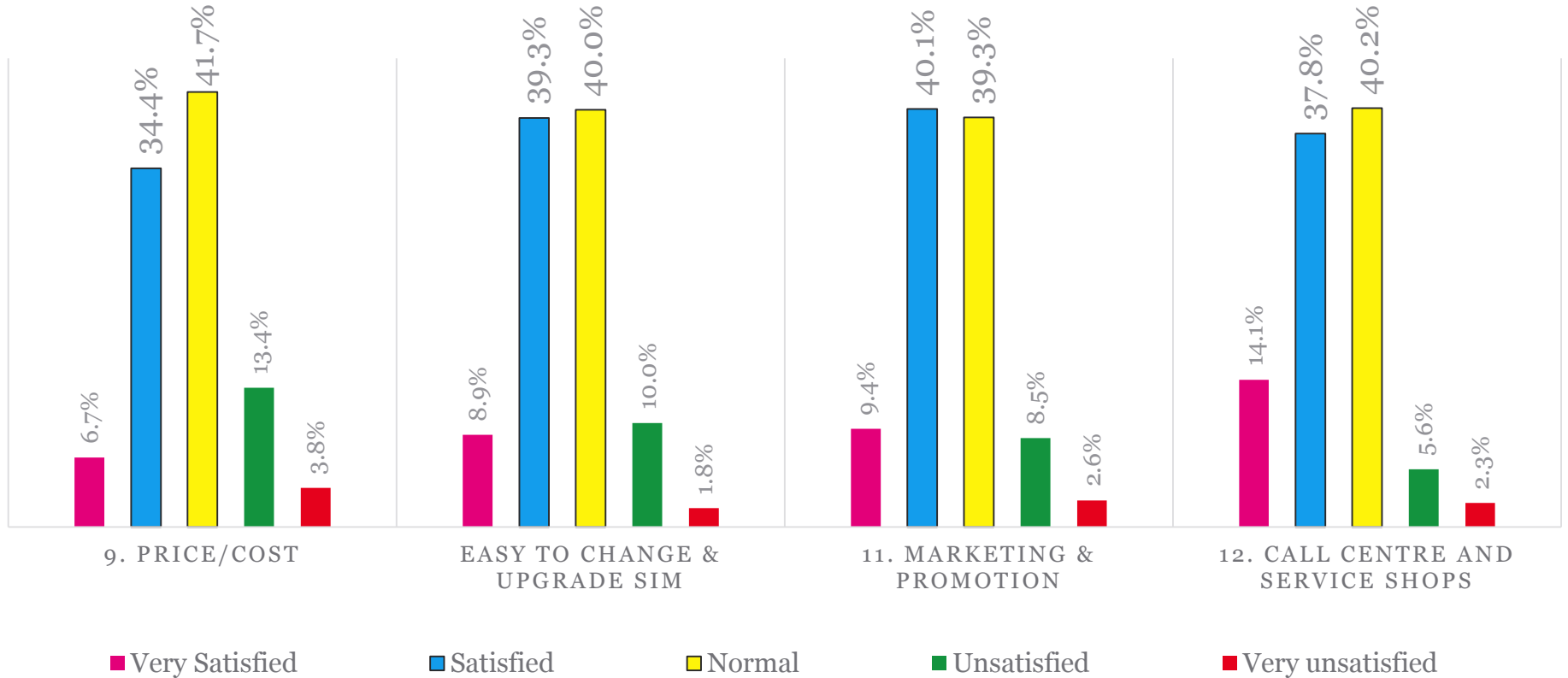
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**9%**

of this sector are unsatisfied about the 4G speed.



# SATISFACTION MEASUREMENT OF SERVICE CRITERIA 4G (GROUP 3)



# End Users most complain and negative feedbacks on Price/Cost 4G?

**17%**

End users  
Dissatisfied on  
package and price  
for 4G

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**81%**

End Users expected  
more promotion and  
marketing campaign  
for 4G

# Customer Conclusion



**29%**

**CUSTOMERS USE 4G FOR  
WORK (payment,  
commerce, advertising,  
conference)**

**56%**

**CUSTOMERS USE 4G  
FOR ENTERTAINMENT  
(social network, movies,  
TV, music, gaming)**





# What are key drivers for Operators LTE take off

Key factors to accelerate revenue and quality

Operators have to improve the quality of the Mobile Broadband experience and drive revenue from voice to data usage and leverage rural areas where fix line not available.

Operators need to improve 4G service network coverage, expanding the reach of the new service to the potential customers as lower income, ages, hospitality, transportations, airports, station.

Customer perspective: Give more high speed internet for trial and experiences and increasing number of regular customers or post paid ones. Successful operators smartly approach high and medium income segment

Combine with 4G Smartphone devices to launch or coordinate to Education sector and self develop more apps for users and entertainment sector

**Thank You**

