



**SPOTLIGHT ON VIETNAM**

**UNDERSTANDING THE  
CONSUMER PERSPECTIVE  
ON DATA PRIVACY IN  
SOUTHEAST ASIA**

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# FOREWORD

The Interactive Advertising Bureau Southeast Asia and India (IAB SEA+India) Regional Board wanted to understand more about what consumers understand, or think they understand, about online privacy. Where there is a plethora of information available about what the digital advertising sector is doing - or needs to be doing - to ensure consumers' data is kept secure, there is little recent data about online privacy from a consumer perspective.

This survey was answered by more than eight thousand consumers in Singapore, Indonesia, Malaysia, Thailand, Vietnam and the Philippines. A little over 1100 respondents were based in Vietnam, and the survey questions were translated into Vietnamese to increase reach and ensure additional accuracy in understanding the questions and in providing the answers.

The results show regional consistencies and a few discrepancies between countries as to their level of understanding of how their information is used by companies; and what they, the consumer, can do to protect their online data. It also reveals how consumers feel about access to free content in exchange for their personal information, and their attitudes to paying for advertising-free online content.

As you read this report you may find there are variances in statistics quoted. This is because multiple at-source references were used.

We hope that you find this research report of help. If you have any questions or would like further information about this research, please contact us at [hello@iabseaindia.com](mailto:hello@iabseaindia.com)

**Miranda Dimopoulos**



**Regional CEO**  
IAB SEA+India





# METHODOLOGY

1. Questions were devised by a special projects group of the IAB SEA + India Regional Board
2. Surveys were created in four languages -
  - a. English (99% of responses were from Singapore, Malaysia and the Philippines)
  - b. Bahasa Indonesia
  - c. Thai
  - d. Vietnamese
3. Surveys were distributed by the IAB SEA+India, the Carousell Media Group, and GrabAds to their databases across Singapore, Malaysia, Indonesia, India, Philippines, Vietnam and Thailand
4. The survey was conducted from mid-July to mid-August 2022
5. It was voluntary to answer each question
6. Age groups ranged from 18 years old up to 75 years or older, categorised into two main groups - 34 years and under; and 35 years and over
7. Any significant differences in responses between genders is noted in the summary of each of the answers to questions
8. According to the survey tool, the typical timeframe to complete the questionnaire was between 2 minutes 30 seconds to 4 minutes 25 seconds
9. Additional research was done by IAB SEA+India Research Team to provide context and background to this survey and to analyse the results.

## In Vietnam

10. 99% of respondents live in Vietnam, the remaining 1% spread across Singapore, Malaysia, Indonesia, Thailand and India
11. The main body of respondents (76%) was in the age group of 18-34 years so younger respondents dominate the sample
12. 53% of respondents were female
13. According to the survey tool, the typical timeframe to complete the questionnaire was between 2 minutes 30 seconds to 4 minutes 25 seconds.



## KEY POINTS OF INTEREST FROM THIS SURVEY



76% of respondents in Vietnam are aged under 34 years



55% are willing to pay for access to advertising-free online content



81% are willing to login to a website in return for receiving fewer, more relevant advertisements



53% say they fully understand data privacy, while 41% say they fully understand what internet cookies do



34% say they are fully aware of changes to internet cookies in the future



58% would log in to a website using their mobile phone number instead of an email address



73% of respondents want to receive a verification code when they log in to a website



79% would prefer to have a single login to access any website



Whether respondents fully understood, or thought they understood, what data privacy means did not significantly affect their answers across all the questions in this survey

## Gender differences

For some questions there was little difference between the responses of men and women. However, the following responses had more than 5% in the variances:

- More men (63%) than women (50%) have paid for subscriptions for digital content such as Netflix, Spotify, newspapers, sports
- More men (60%) than women (47%) say they fully understand what data privacy means
- More men (60%) than women (46%) say they fully understand how to protect their privacy online
- More men (49%) than women (35%) say they fully understand what internet cookies do
- More men (46%) than women (33%) say they fully understand when internet cookies are or are not being used when browsing a website
- More men (46%) than women (35%) say they fully understand what happens when they accept cookies when browsing websites
- Significantly more men (43%) than women (27%) say they are fully aware of changes to internet cookies in the future
- More men (48%) than women (37%) say they fully understand that they see advertisements online in exchange for access to free content.







# BACKGROUND

## Population and Economy

The Socialist Republic of Vietnam has a [population](#) of 98.51 million and is led by the Vietnam Communist Party. The General Statistics Office says that 63% of the population live rurally and the remaining 37% live in urban areas as at the end of 2021.

Vietnam is the sixth largest economy in Southeast Asia behind Indonesia, Thailand, Singapore, the Philippines and Malaysia. Its annual GDP as at September 2022 was USD363 billion. Out of the six countries in this survey, Vietnam has experienced the [strongest annual growth](#) in GDP, at 13.6% year on year in Q3 2022.

The IMF in September 2022 raised their Vietnam growth forecast to 7% for 2022, one percentage point from the previous three months. It notes that it is the only significant upward revision among major Asian economies. It has, however, lowered the projection for 2023 by 0.5 percentage points to 6.7% which would still leave the [Vietnam economic growth](#) as the fastest among Asia's major economies.

## Civil Rights

The International Covenant on Civil and Political Rights (ICCPR) came into force in March 1976 to protect Freedom of Expression and Information (FOE/I). Vietnam ratified it in 1982. While the Constitution of Vietnam 2013 and its law along with the ICCPR provide for freedom of expression for individuals, the press and other media, these rights have not necessarily been respected and there are reports of censorship of media critical of the government.







## The conundrum

The question here is whether, even with protective treaties and laws in place, Vietnamese people can expect their own government not to access personal data. An article published by the [Vietnam Law Magazine](#) in July 2022 says that Vietnam does not have a separate, comprehensive law with a common understanding specifically covering personal data and personal data protection.

It notes that laws use around 10 terms including *personal information*, *private information*, and *personal information on the internet*, across some 70 legislative documents that are, according to the report, “conflicting, overlapping, inadequate or unsuitable.”

A Paper published by the University of Melbourne and authored by lecturers from The Vietnam National University and the National University Hanoi, examines digital rights and the [limiting of freedom of expression](#) in Vietnam during the Covid-19 Pandemic. It states that while Vietnam grants FOE/I as a constitutional right, many other laws and regulations exist to restrict this freedom including the Penal Code, Media and Press Law, Internal Security Act, Computer Act and the power granted by declaring a State of Emergency.

At the same time, the government has set ambitious targets under its move to digital government, economy and society by 2030. To achieve this, data privacy and security is paramount, particularly if targets include having [80% of the population](#) aged 15 and over with online transaction accounts at banks, and 50% of the adult population using digital or personal electronic signatures.

## Background

### Internet & Technology

Vietnam also wants to be in the top 40 countries globally in the Global Cybersecurity Index (GCI). This is set out in its National Digital Transformation Program by 2025 whereby Vietnam will overhaul government operations, business processes, the working lifestyles of citizens and create a safe, secure and humane digital environment. The planned result will be a digital government, digital economy, digital society and digital businesses that have the capacity to compete globally.

In April 2022 The Ministry of Information and Communications (MIC) said that 74% of adults were using smartphones in Vietnam and it intends increasing this to 85% by year end. The Department of Telecommunications (of the MIC) said that in March 2022 there were 93.5 million smartphone subscribers. As of August 2022 the MIC reports that 72% of households use broadband cable internet, with an end of year target of 75%.

The high number of people living in the provinces still using feature phones means that 8.6 million out of 10 million people will need to move to smartphones in order to achieve government targets.





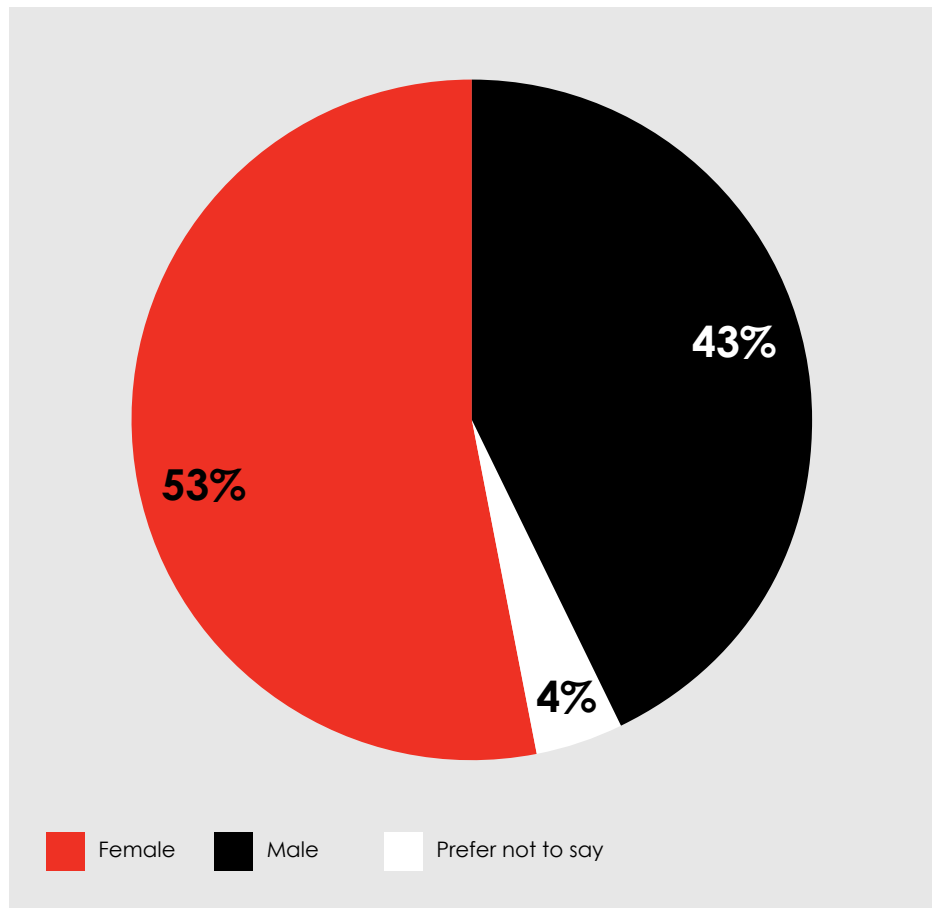


SURVEY RESULTS:  
**VIETNAM**

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## Gender Profile

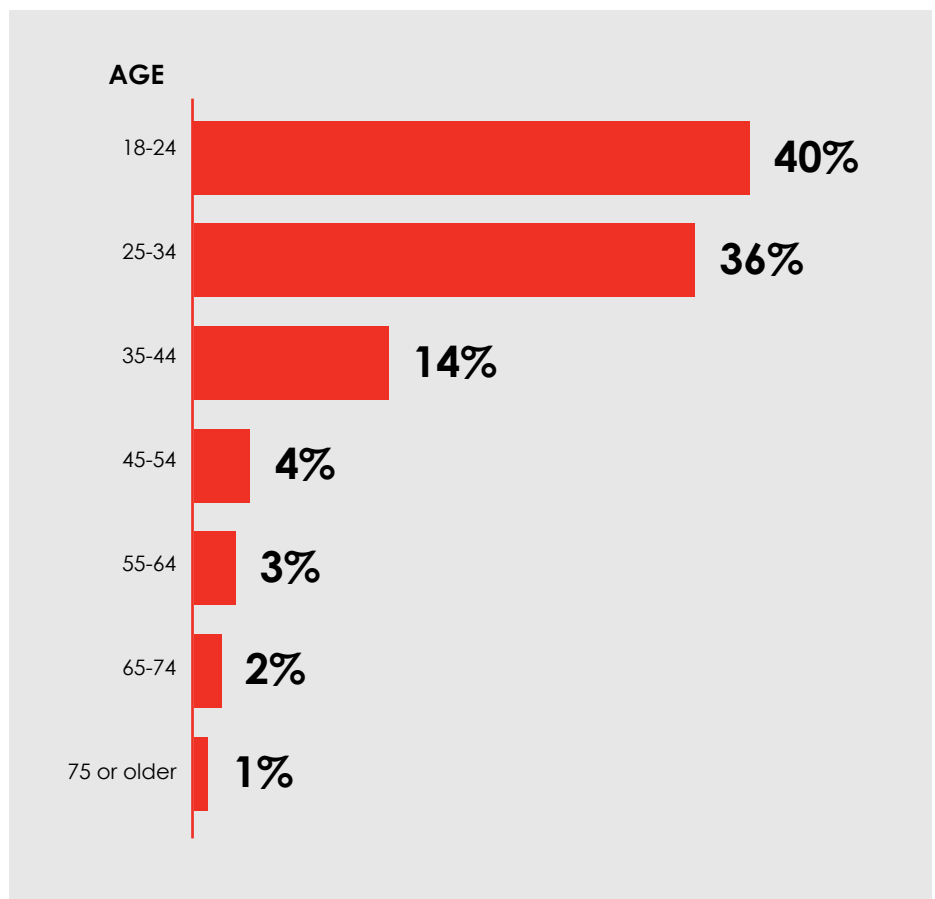
More women than men volunteered to complete this survey.



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## Age Group

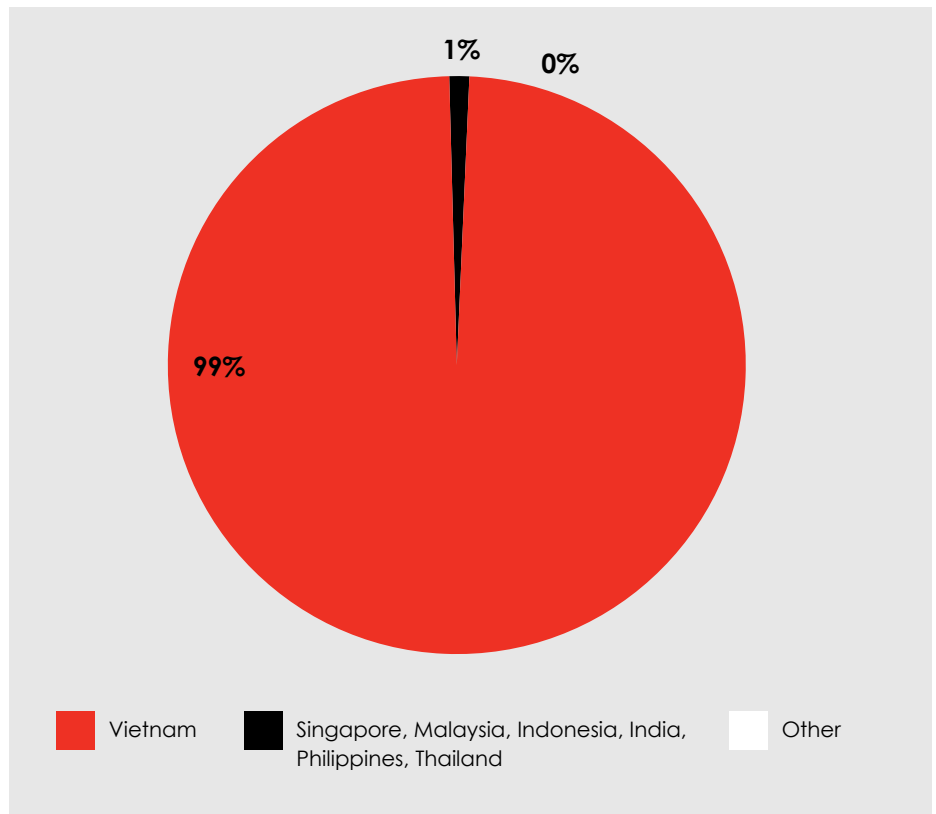
76% of respondents from Vietnam are aged 34 years and under, with just 24% aged over 35 years, making them the youngest group of respondents in this survey.



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## Where respondents live

Nearly all of the respondents to this survey (99%) live in Vietnam with the remaining 1% living across the other countries in the region.

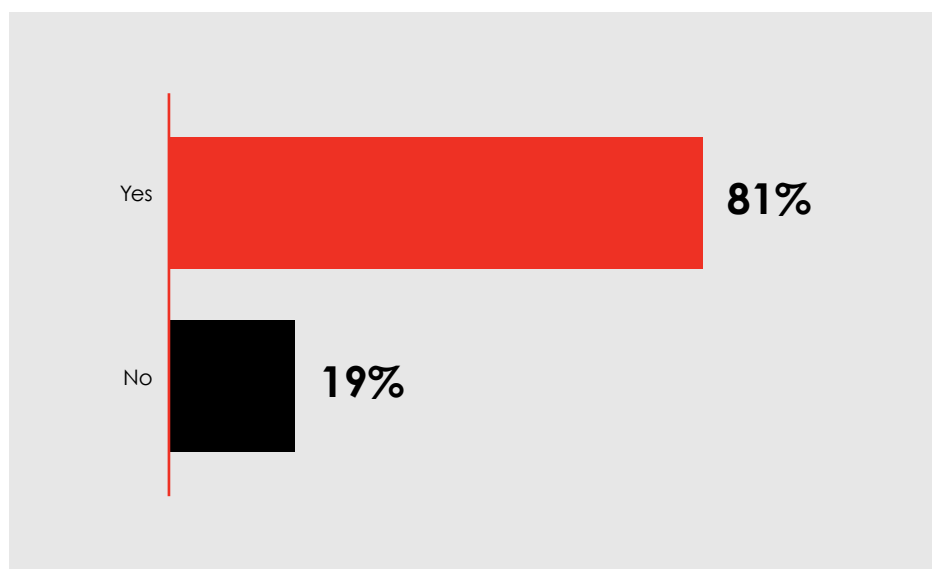


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## Willingness to login to a website if it means fewer, more relevant advertisements

Eight out of ten Vietnamese respondents (81%) are willing to provide login details to a website in return for receiving fewer, more relevant advertisements, the highest in this survey. Vietnam is followed by Thailand (60%), Indonesia (49%) and Singapore/Malaysia/Philippines (43%). There is little difference between gender responses (82% women), (80% men).

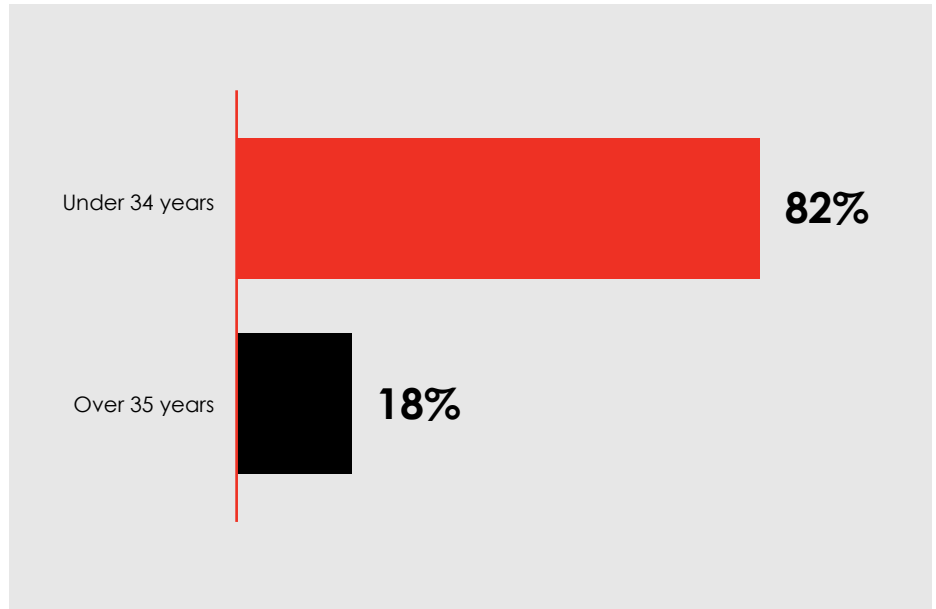
## Willingness to login to a website for fewer, more relevant advertisements





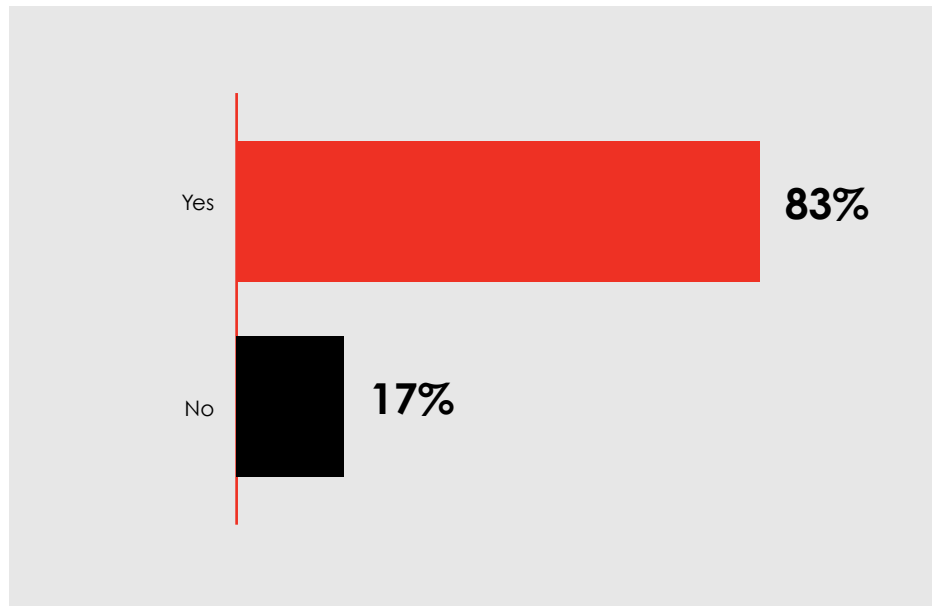
Breaking this down into age groups, the majority of respondents (82%) willing to provide login details in return for fewer advertisements are under 34 years old.

### **By Age Group: Willingness to login to a website with fewer, more relevant ads**



When filtering this question by respondents who say they understand, or think they understand what data privacy means and what cookies do, there is a marginal increase to 83% of people who are willing to login to a website if it means fewer, more relevant advertisements.

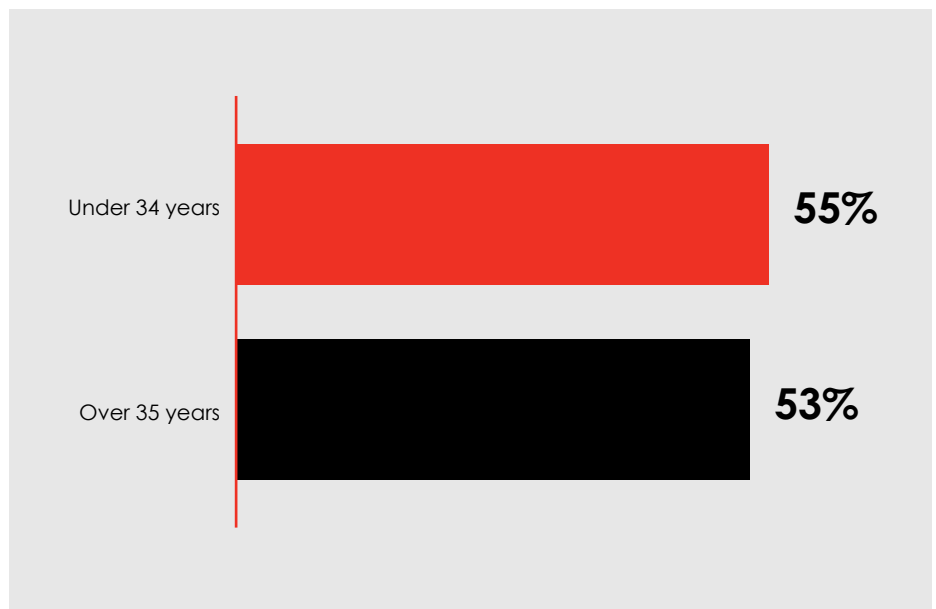
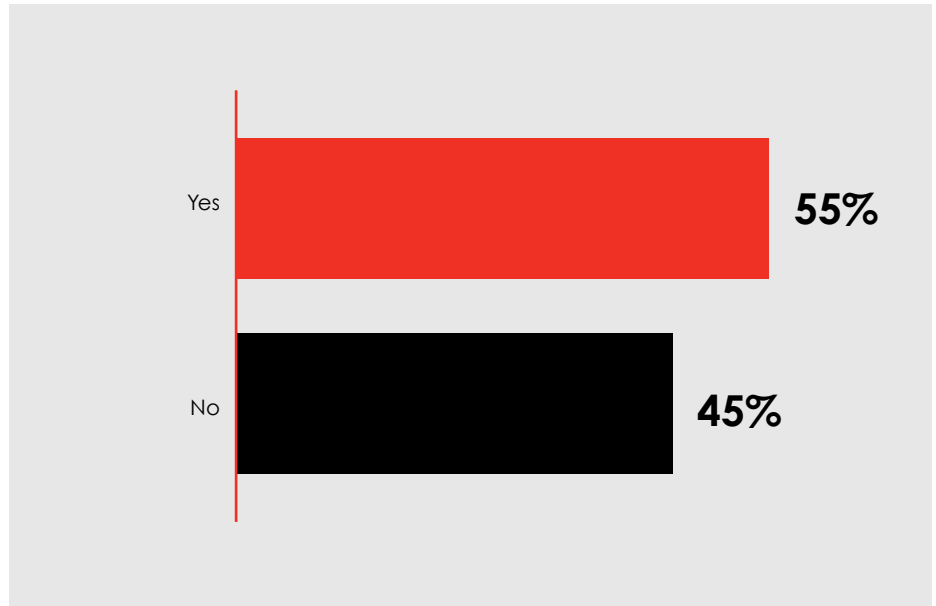
### **Filtered by I understand, or think I understand what data privacy means and what cookies do**



## Willingness to pay to access online content if it means not seeing online advertisements

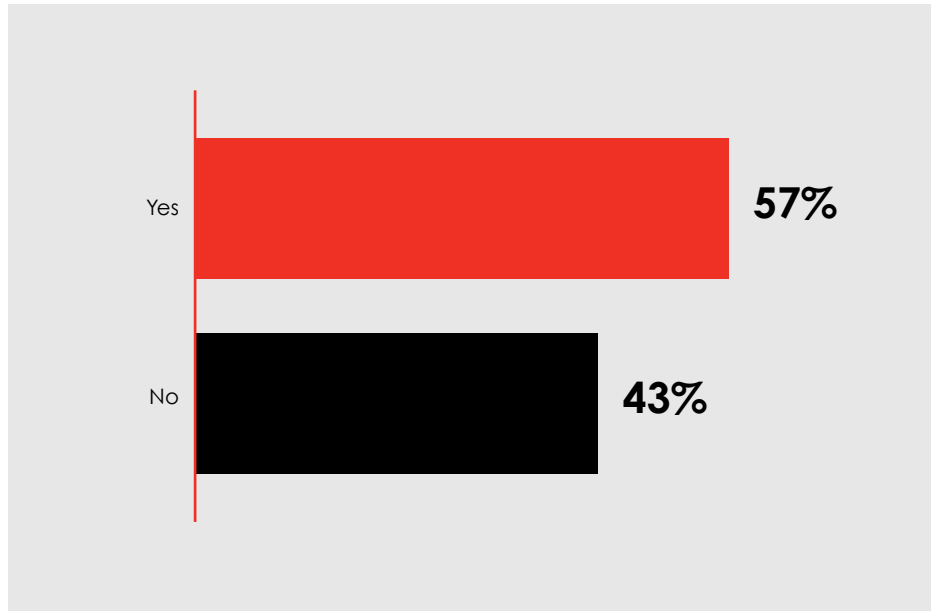
Just over half of respondents (55%) are willing to pay for content in order to stop seeing online advertisements. Most respondents (53%) willing to pay for content are over 34 years of age. More men (58%) than women (53%) are prepared to pay for ad-free content.

### Willingness to pay to access online content if it means not seeing online advertisements



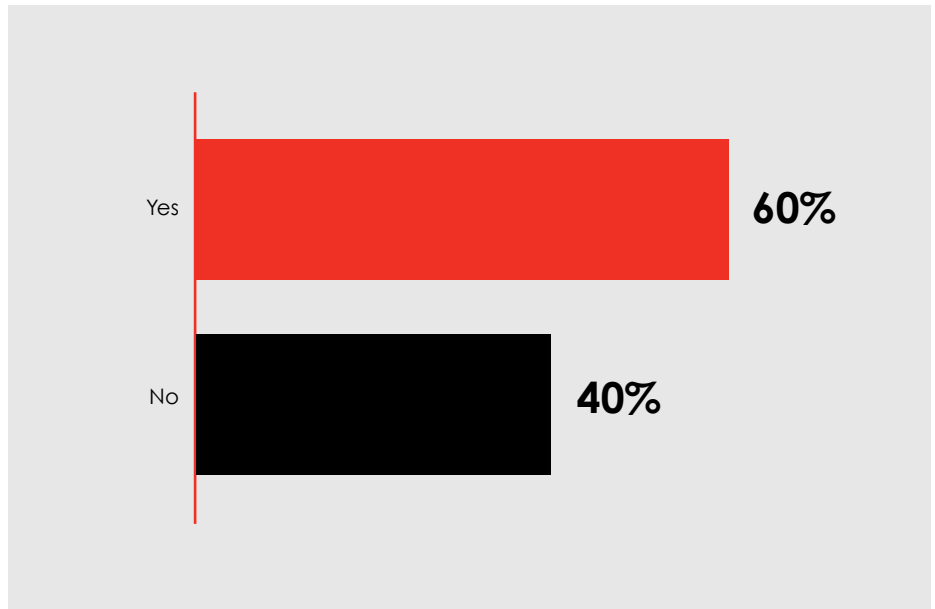
When filtering this question by respondents who say they understand, or think they understand what data privacy means, there is a small increase to 57% of respondents willing to pay for advertising-free content.

**Filtered by I understand, or think I understand what data privacy means**



When filtering this question by respondents who say they understand, or think they understand what cookies do, this increases to six out of 10 (60%) of respondents who are willing to pay to access advertising-free content.

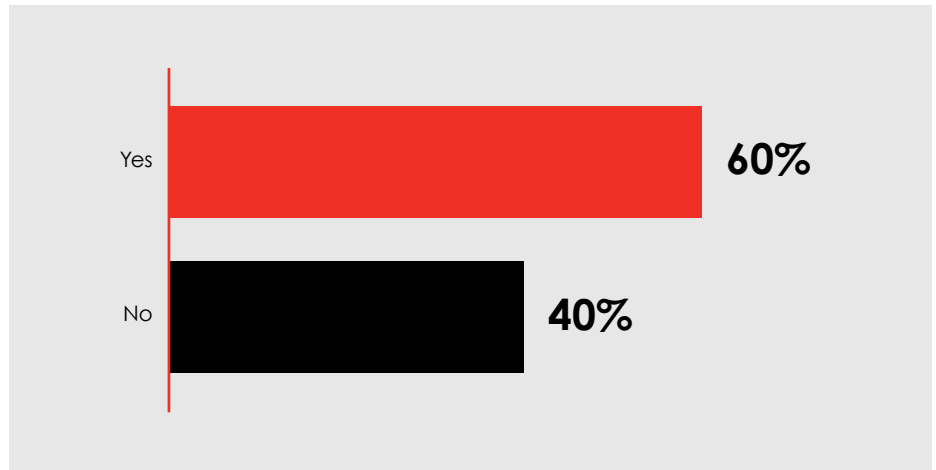
**Filtered by I understand, or think I understand what cookies do**



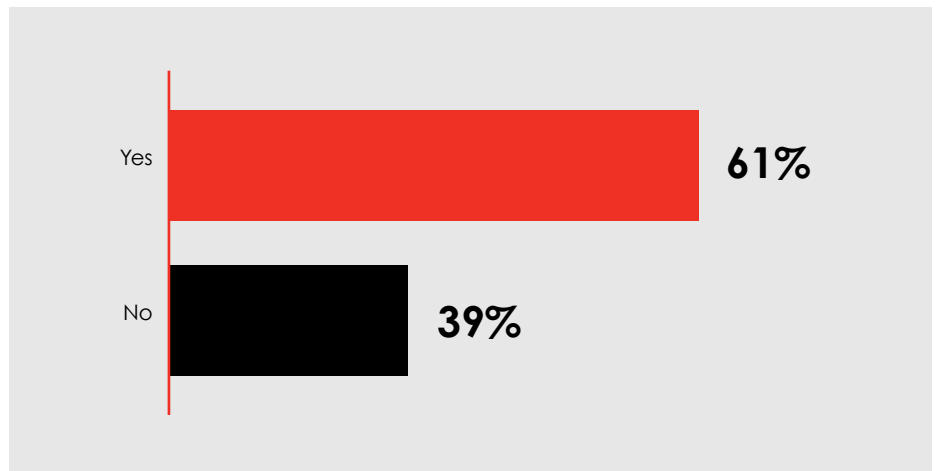
## Willingness to share information about interests in return for free content

Six out of 10 respondents (60%) would share information about their interests in return for free content. This increases marginally to 61% for respondents who understand, or think they understand what data privacy means and what cookies do. Genders were equal at 61% of respondents willing to share information about their interests.

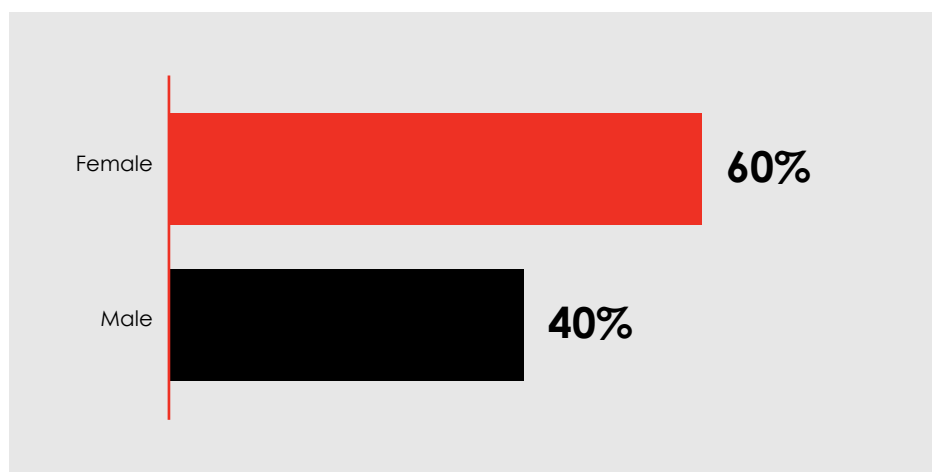
### Willingness to share information about interests in return for free content



### Filtered by I understand, or think I understand, what data privacy means and what cookies do



### Willingness to share information about interests in return for free content

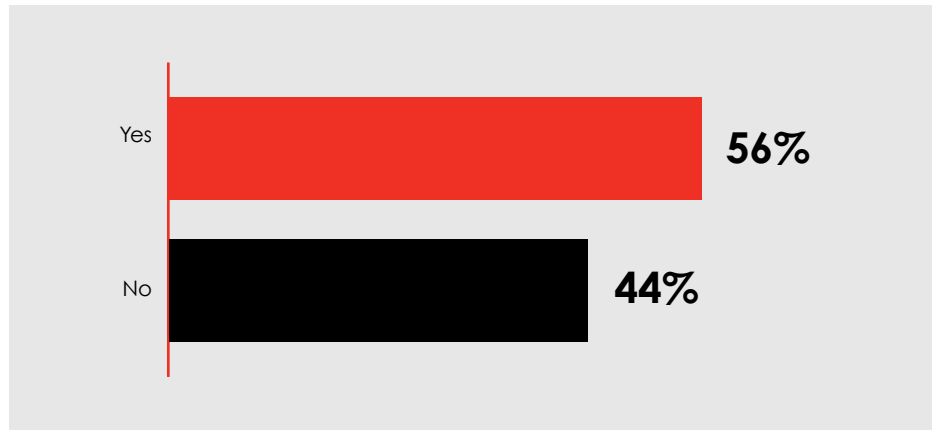




## Respondents who have paid for subscriptions for digital content such as Netflix, Spotify, newspapers, sports

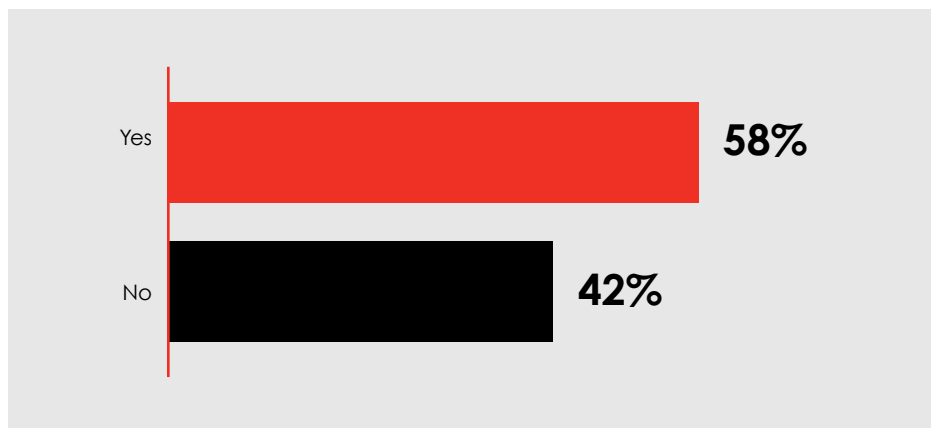
More than half of respondents (56%) have paid for subscriptions to channels that provide digital content, six out of 10 (59%) of whom are aged under 34 years. More men (63%) than women (50%) have paid for subscriptions to digital content.

### Respondents who have paid for subscriptions for digital content such as Netflix, Spotify, newspapers, sports

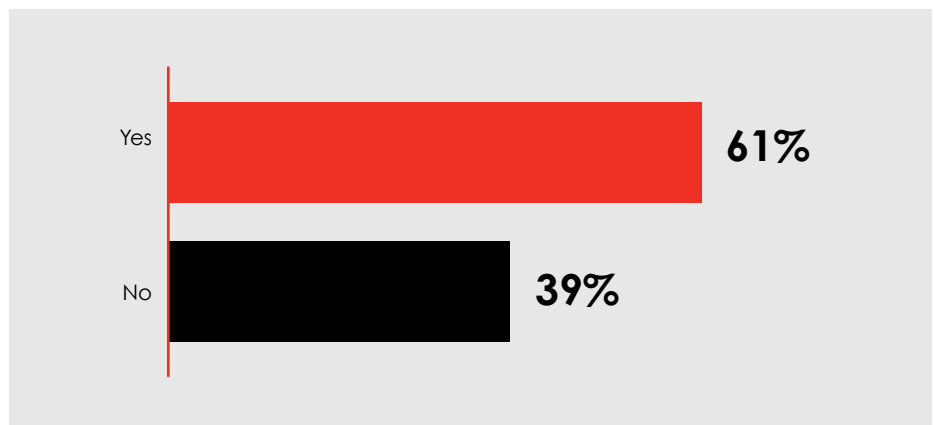


58% of respondents who answered Yes to this question also understand, or think they understand what privacy means; and 61% say they understand or think they understand what cookies do.

### Filtered by I understand, or think I understand what privacy means



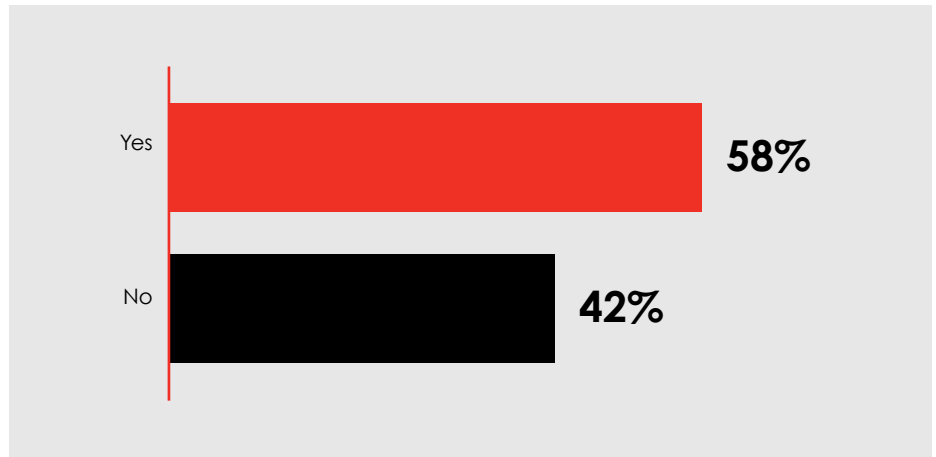
### Filtered by I understand, or think I understand what cookies do



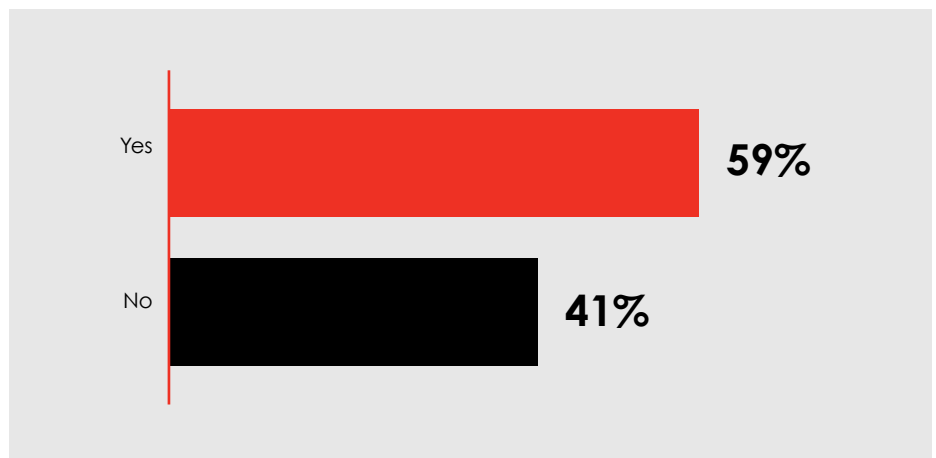
## Respondents willing to enter an email address into a website for access to free online content

Six out of 10 respondents (58%) are willing to enter their email address into a website if it gives them access to free online content. This remains the same across both age groups. Of those who answered yes to this question, 59% say they understand or think they understand what data privacy means; and 60% say they understand or think they understand what cookies do. There was minimal variance in gender responses to this question.

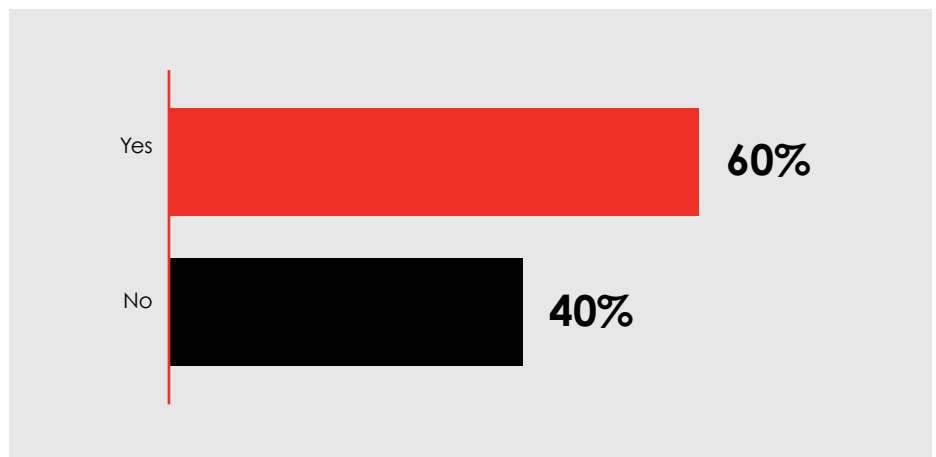
### Respondents willing to enter email address into website for access to free online content



### Filtered by I understand, or think I understand, what data privacy means



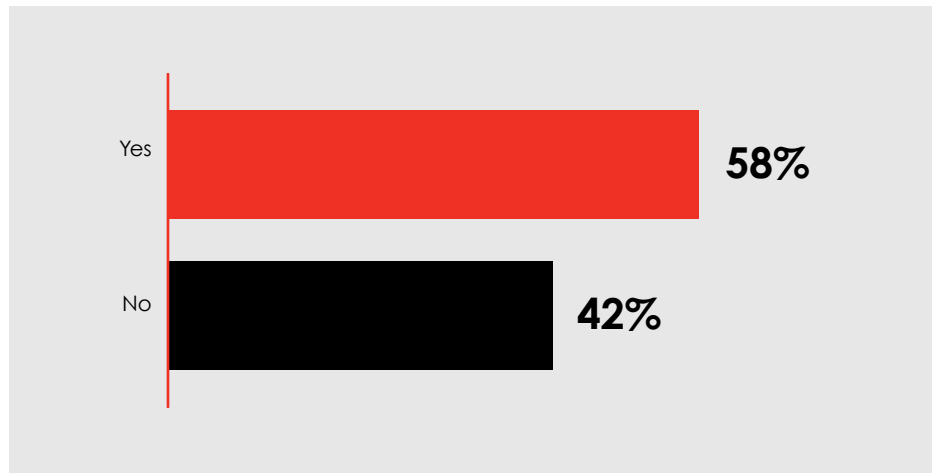
### Filtered by I understand, or think I understand what cookies do



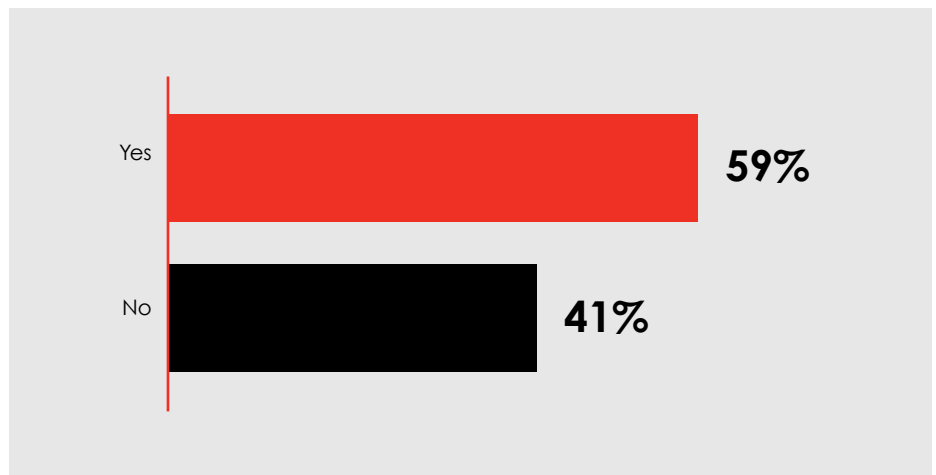
## Respondents who would prefer to log in to a website using their mobile phone number instead of their email address

Six out of 10 respondents (58%) would log in to a website using their mobile phone number instead of an email address. Of these, 59% are aged under 34 years. 59% of respondents say they understand or think they understand what data privacy means (59%) and what cookies do (60%). There was minimal variance in gender responses to this question.

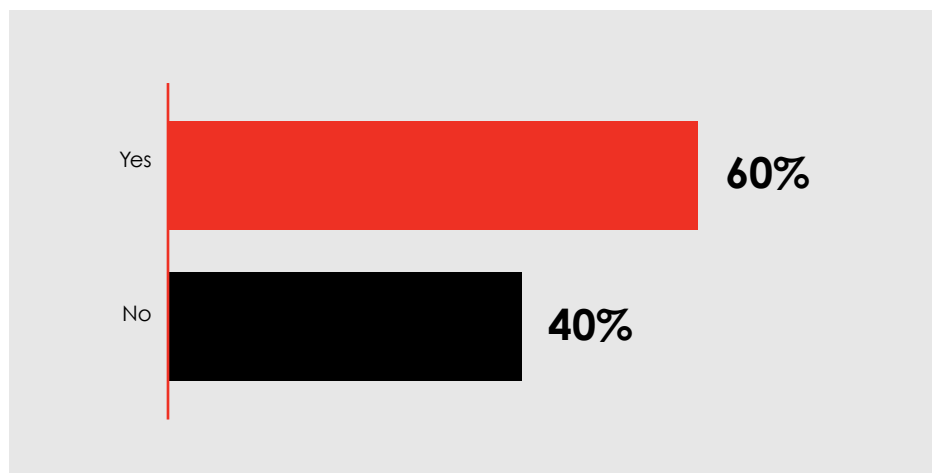
### Respondents preferring to log in to a website using their mobile phone number instead of their email address



### Filtered by I understand, or think I understand, what data privacy means



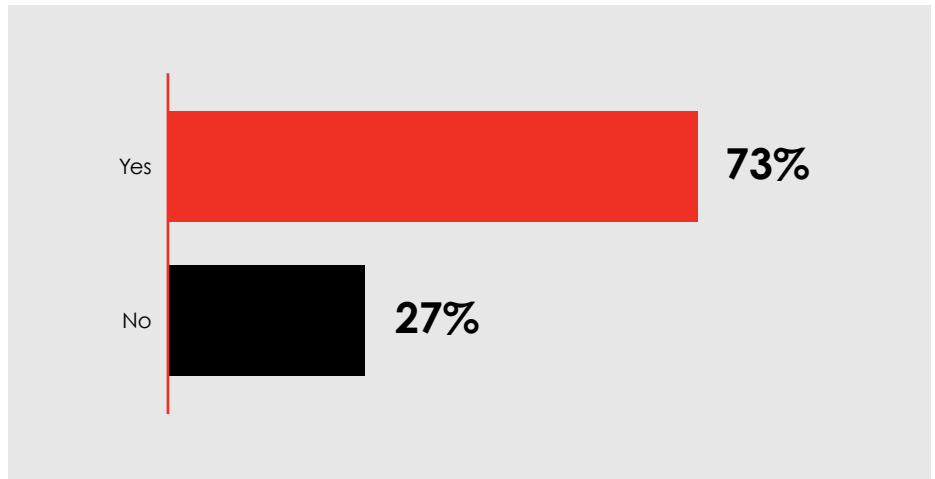
### Filtered by I understand, or think I understand what cookies do



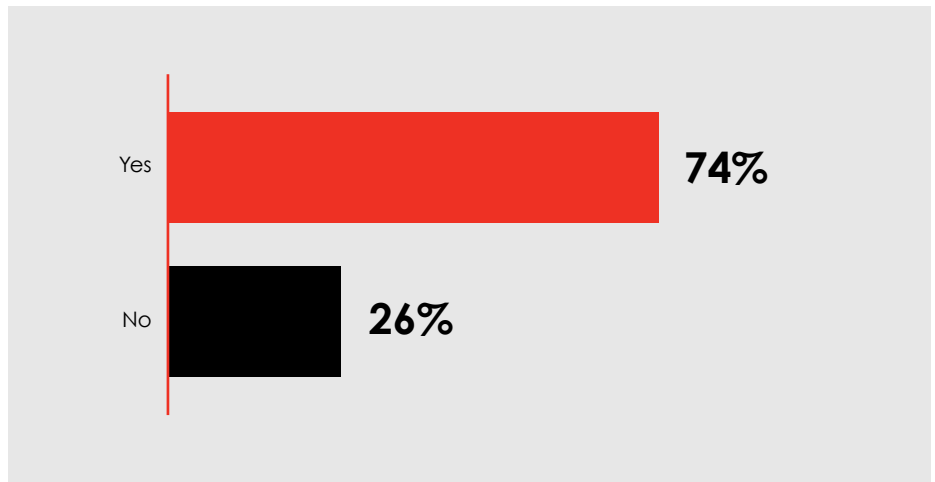
## Preference to receive a verification code when logging in to a website

Most respondents (73%) want to receive a verification code when they log in to a website, 72% of whom are aged under 34 years. 74% say they understand, or think they understand what data privacy means, while 75% say they understand, or think they understand what cookies do. Both men and women responded equally (73%) to this question.

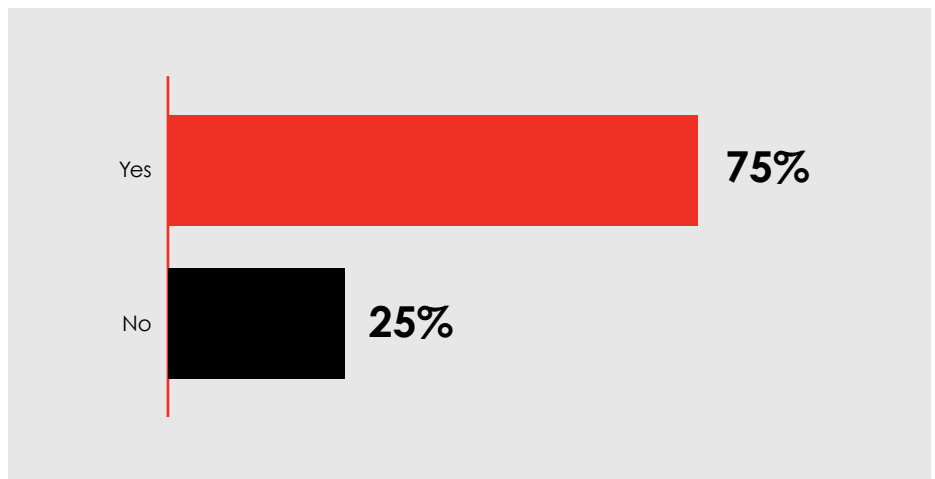
### Preference to receive a verification code when logging in to a website



### Filtered by I understand, or think I understand, what data privacy means



### Filtered by I understand, or think I understand what cookies do

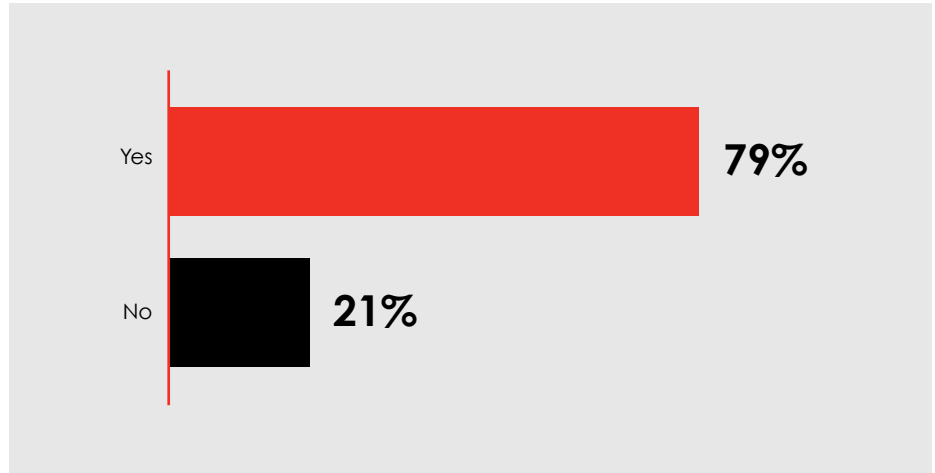




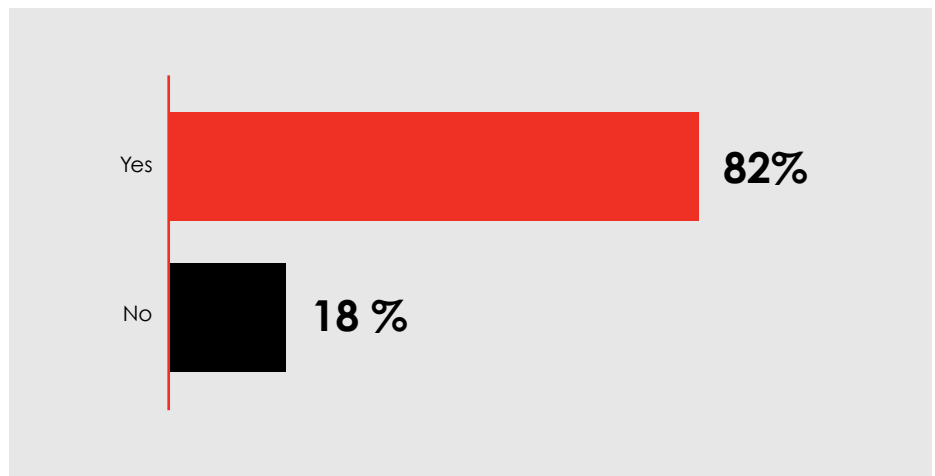
## Single login to access any website

The majority of respondents (79%) would prefer to have a single login that they can use to access any website, rather than creating logins for each website separately. Eight out of 10 (81%) are aged under 34 years; 82% say they understand, or think they understand what data privacy means, and 81% say they understand, or think they understand what cookies do. There was minimal variance in gender responses to this question.

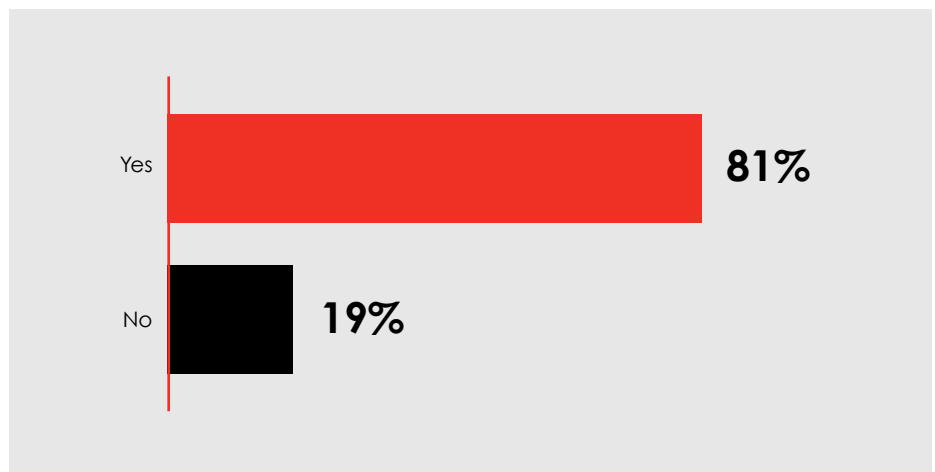
### Prefer to have a single login to access any website



### Filtered by I understand, or think I understand, what data privacy means

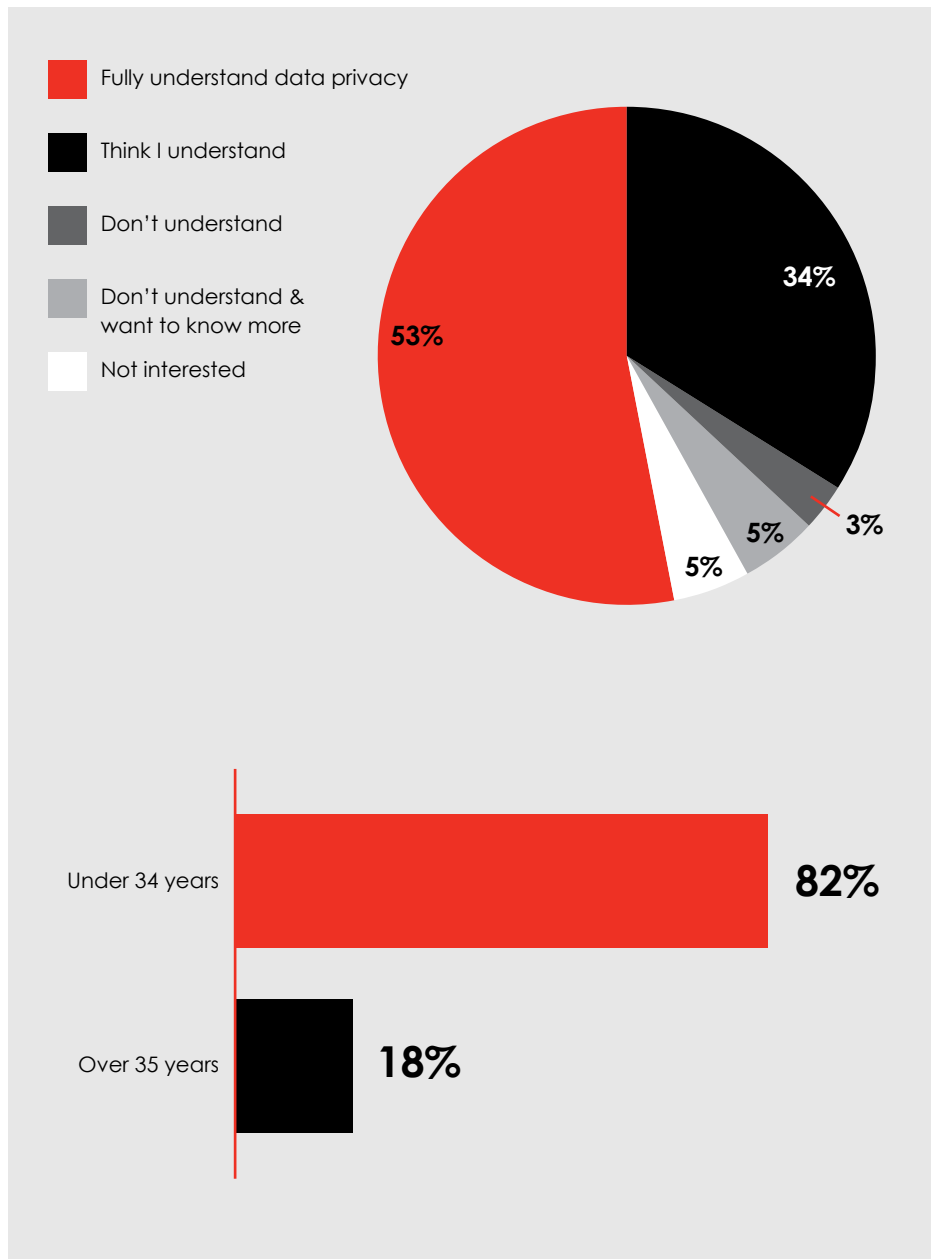


### Filtered by I understand, or think I understand what cookies do

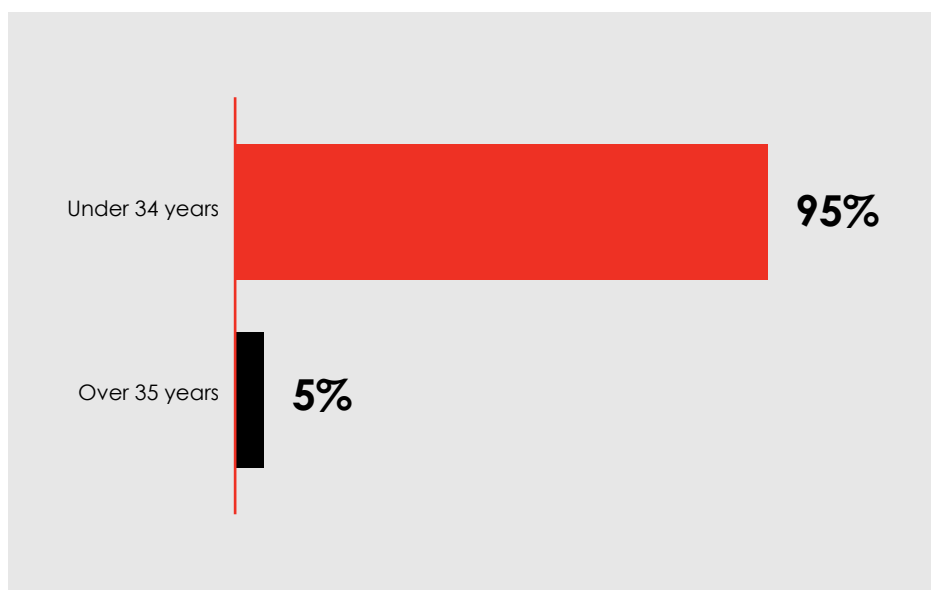


## I understand what data privacy means

Nine out of 10 respondents (53%) say they fully understand data privacy, less than Singapore/Malaysia/Philippines (64%) and Indonesia (62%) but more than Thailand (38%). The majority (82%) are aged under 34 years 95% of whom also say they understand, or think they understand what cookies do. More men (60%) than women (47%) say they fully understand what data privacy means.



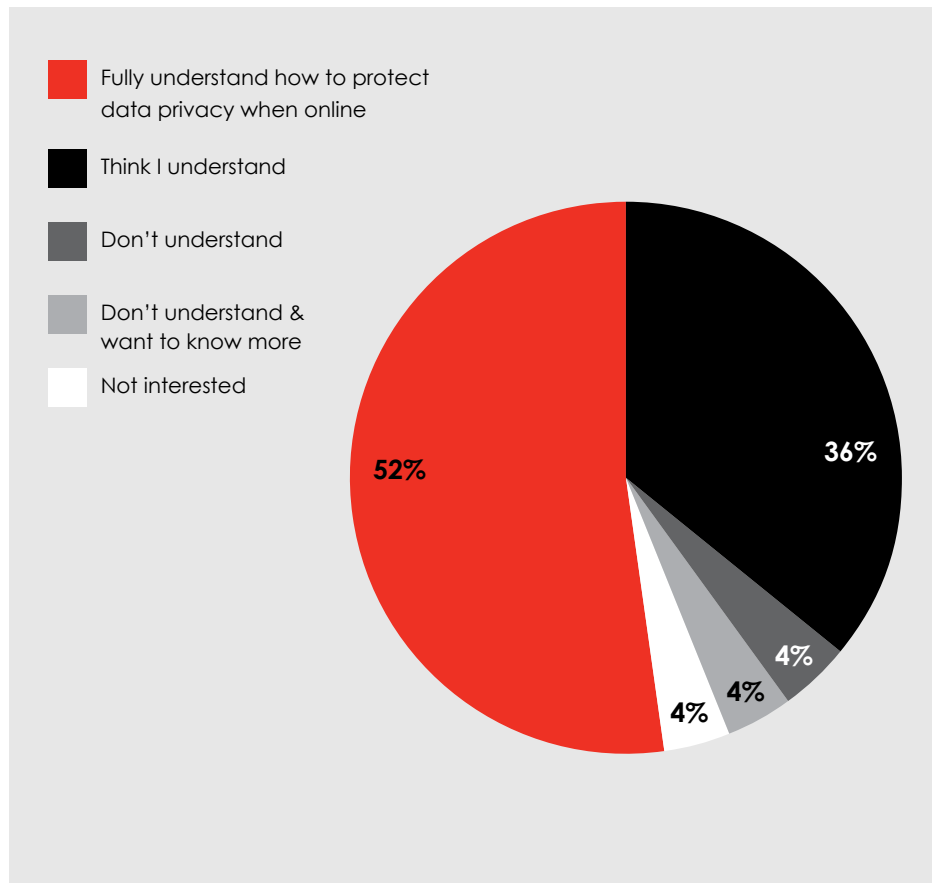
## Filtered by I understand, or think I understand what cookies do



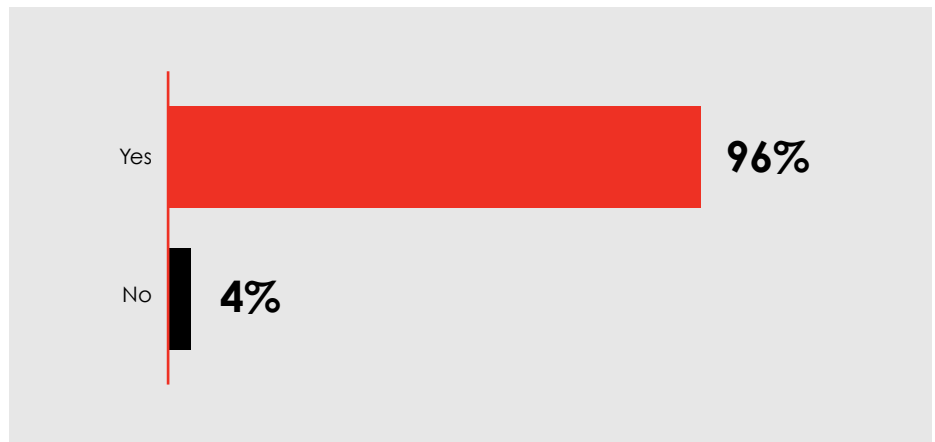
## When I'm online, I understand how to protect my privacy if I want to

The majority of respondents say they fully understand, or think they understand how to protect their privacy when online, six out of 10 (59%) of whom are aged under 34 years.

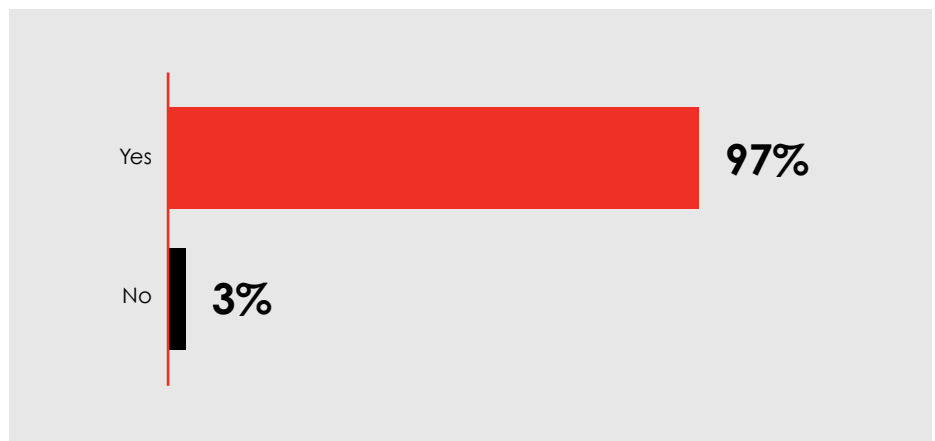
Nearly all (96%) say they understand, or think they understand what data privacy means and what cookies do (97%). More men (60%) than women (46%) say they fully understand how to protect their privacy when online.



## Filtered by I understand, or think I understand, what data privacy means

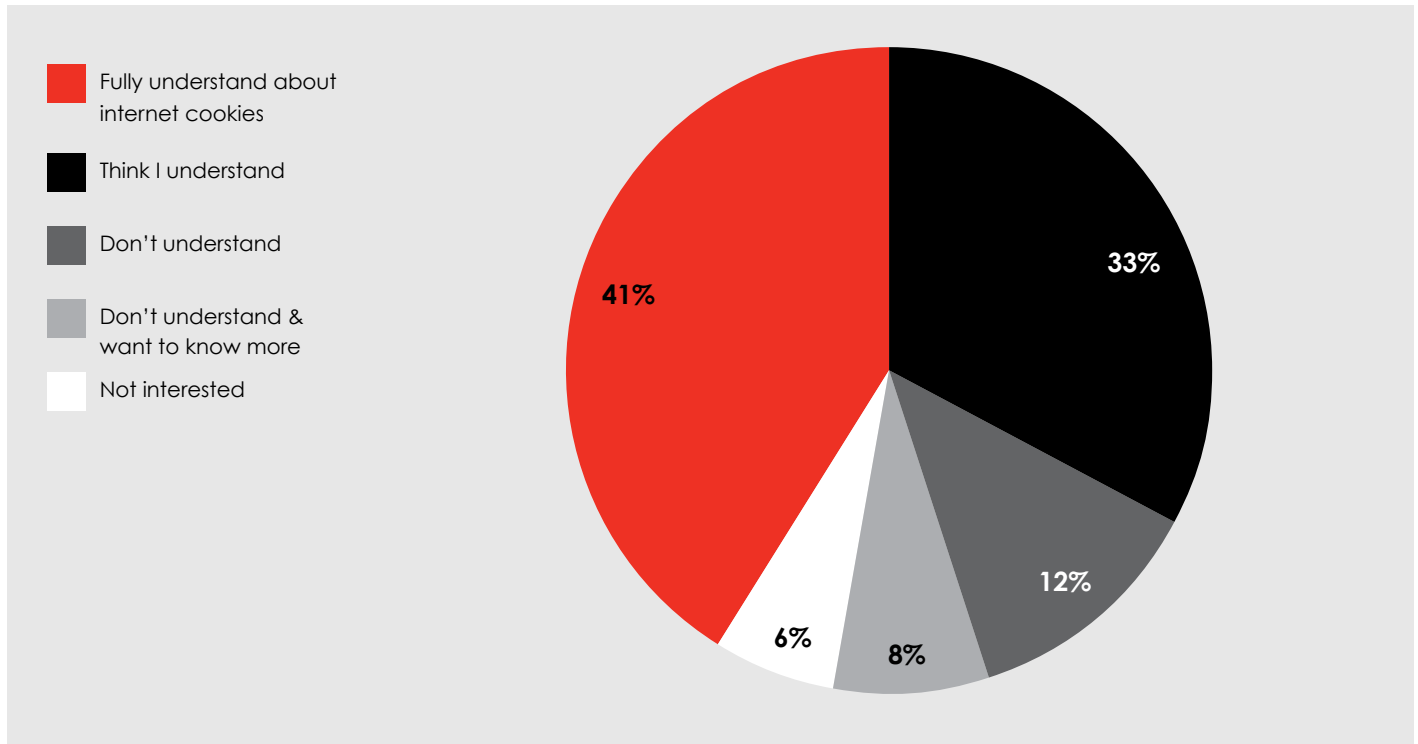


## Filtered by I understand, or think I understand what cookies do

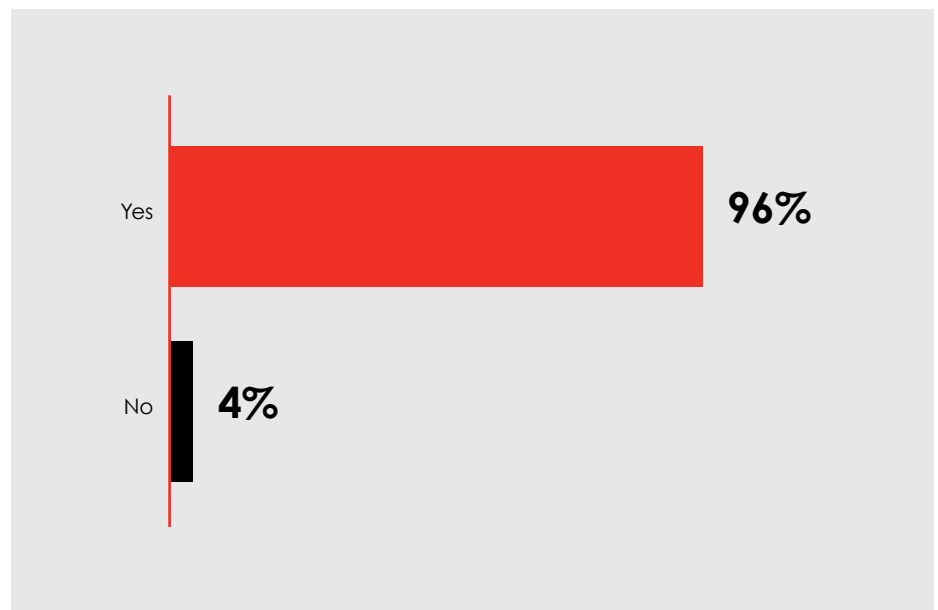


## I know what internet cookies do

Most respondents (80%) either fully understand or think they understand about internet cookies of whom 96% understand, or think they understand what data privacy means. More men (49%) than women (35%) say they fully understand what cookies do.



### Filtered by I understand, or think I understand, what data privacy means

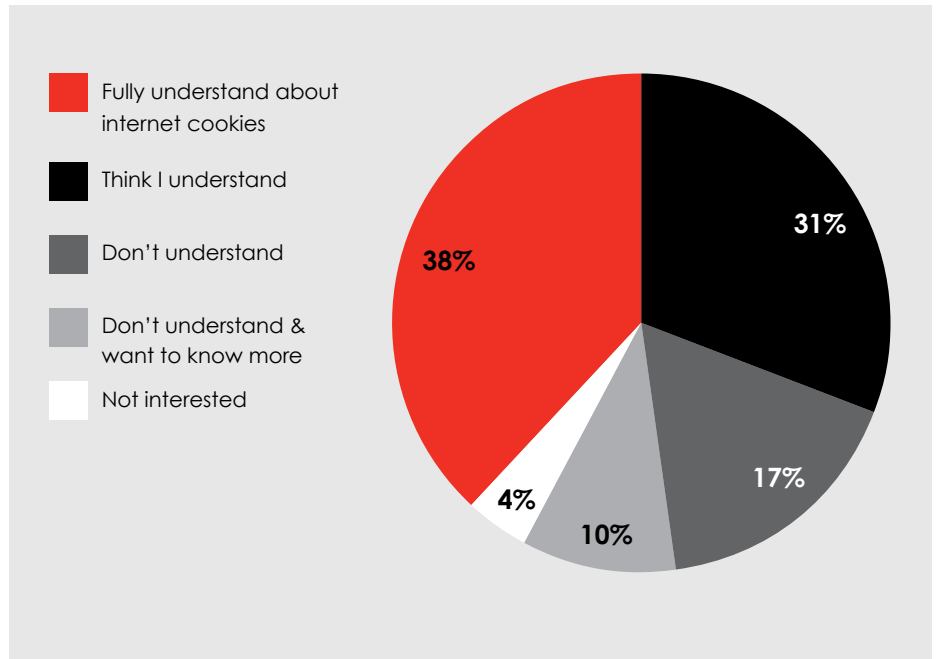




## I know when internet cookies are or are not being used

While the majority of respondents (69%) say they fully understand or think they understand when internet cookies are - or are not - being used on a website they are browsing, 17% say they don't understand them at all while 10% don't understand and want to know more. More men (46%) than women (33%) say they fully understand when cookies are or are not being used.

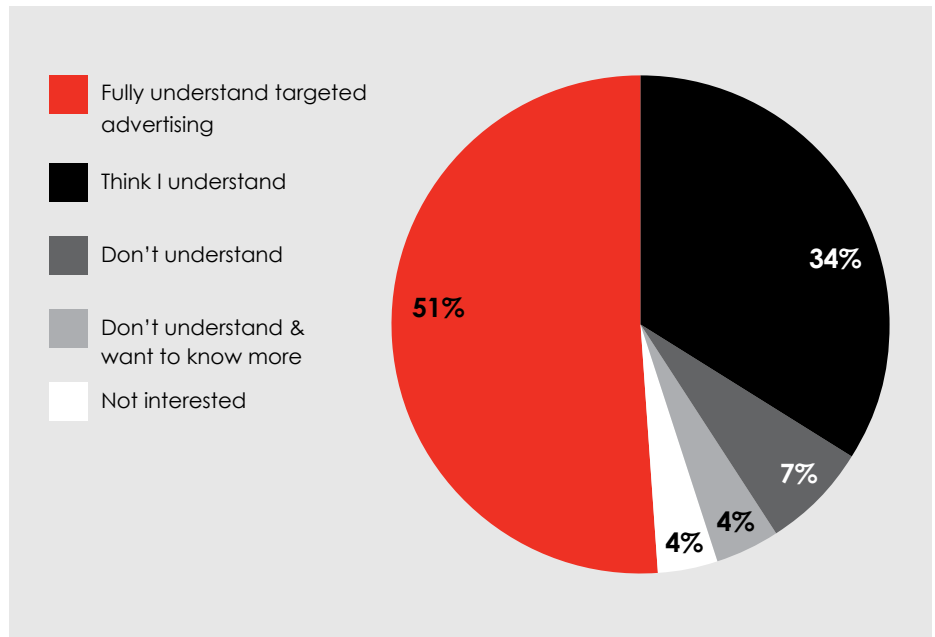
### I know when internet cookies are or are not being used



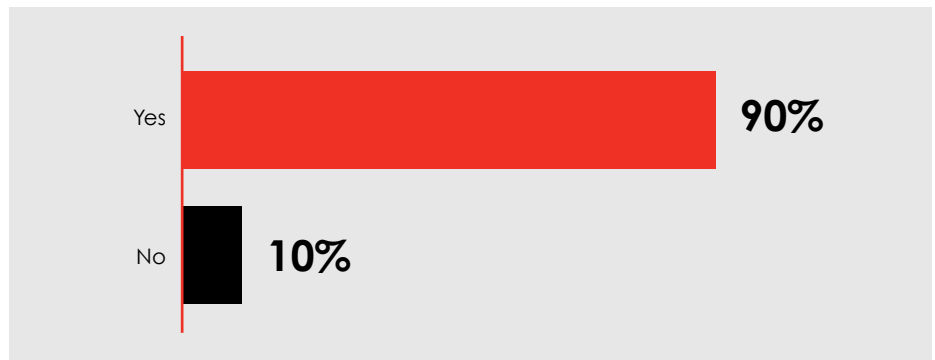
## I know that I receive advertisements for products and services of interest to me based on things I look at online

Most respondents (85%) say they fully understand or think they understand how they receive advertisements based on what they've been looking at online; 90% say they understand, or think they understand what data privacy means, and what internet cookies do (91%). There was minimal variance in gender responses to this question.

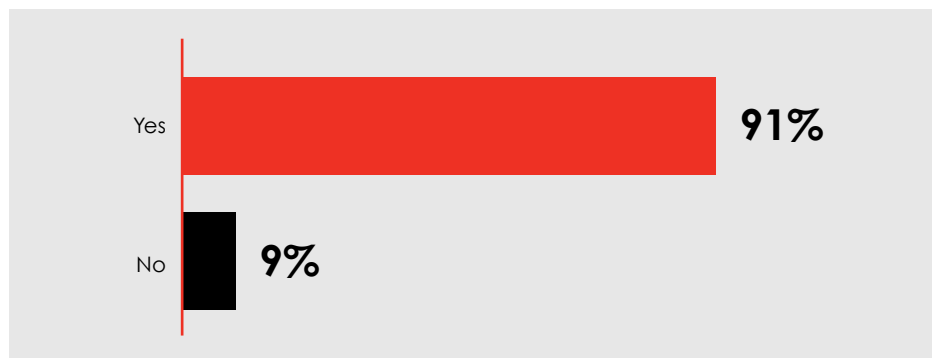
### I know I receive advertisements for products and services based on what I view online



### Filtered by I understand, or think I understand what data privacy means



### Filtered by I understand, or think I understand what cookies do

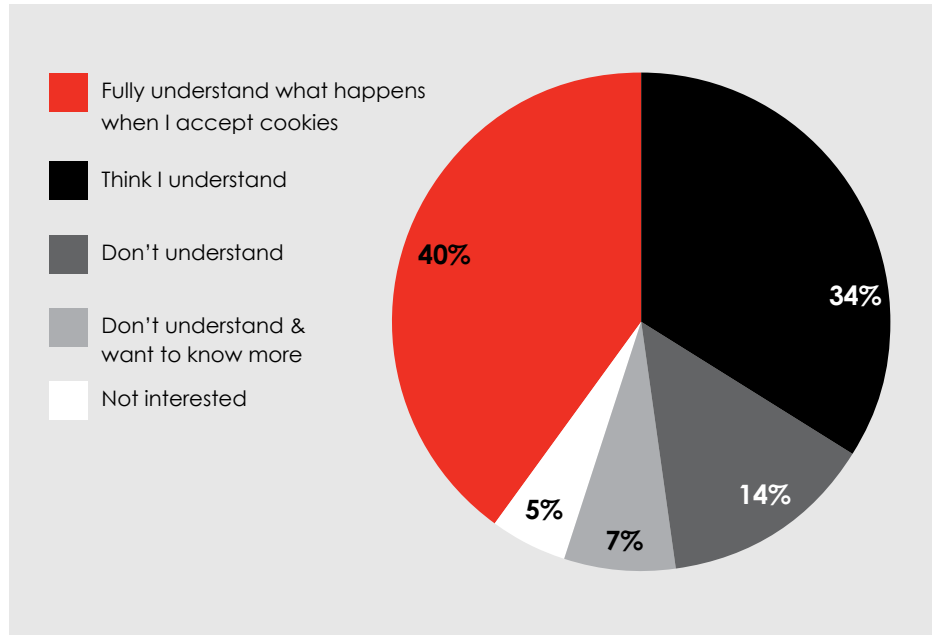


## I know what happens when I accept cookies when looking at websites

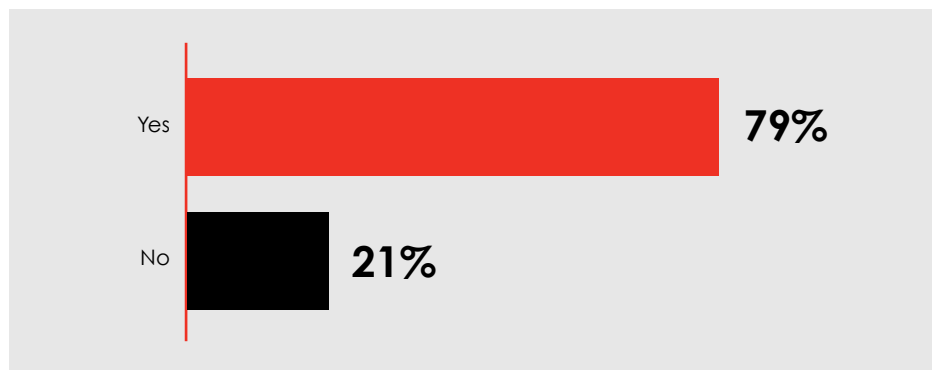
More than eight out of 10 (83%) respondents say they understand or think they understand what happens when they accept Internet cookies when browsing websites.

79% say they understand, or think they understand what data privacy means, and what internet cookies do (87%). More men (46%) than women (35%) say they fully understand what happens when they accept internet cookies.

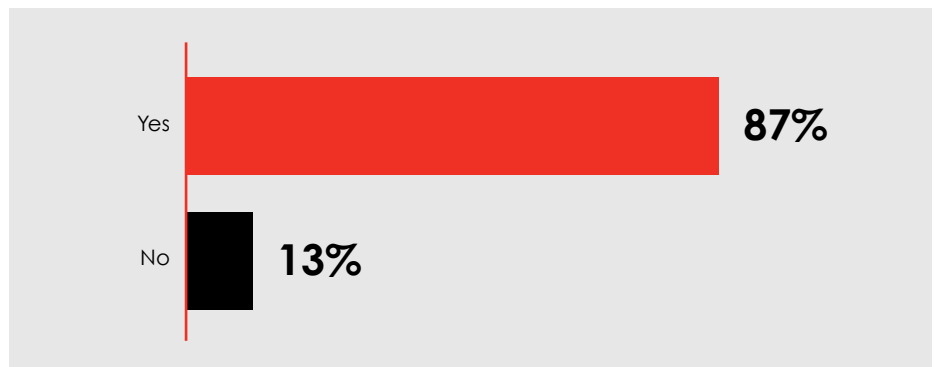
## I know what happens when I accept cookies when looking at websites



## Filtered by I understand, or think I understand what data privacy means



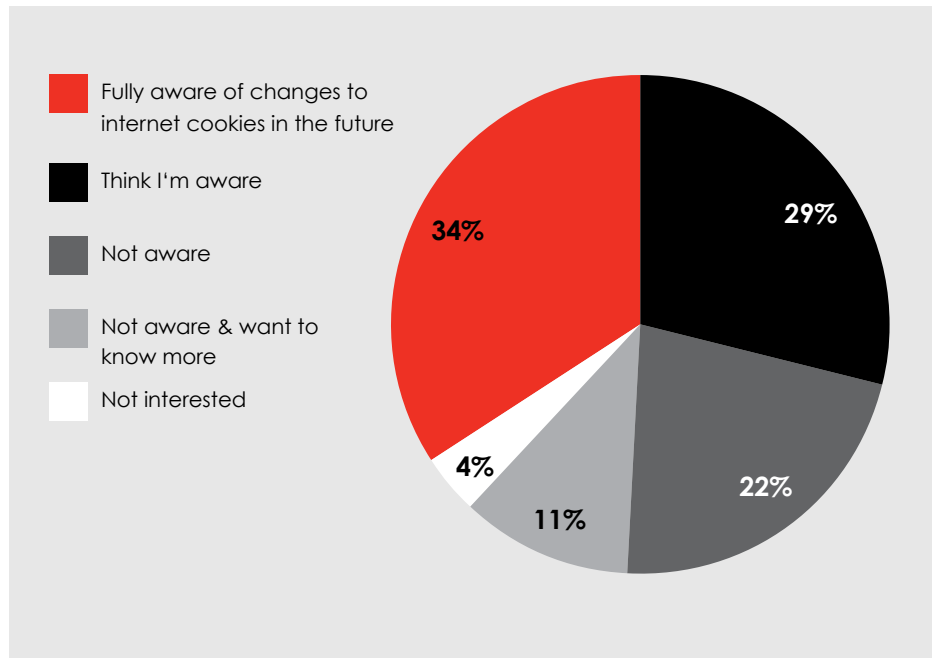
## Filtered by I understand, or think I understand what cookies do



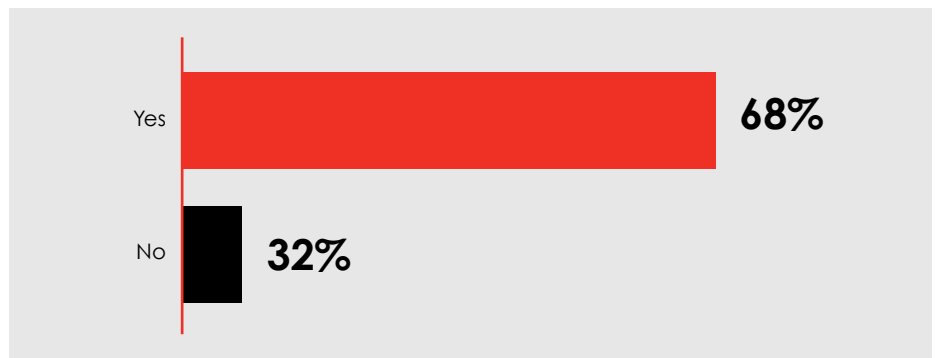
## I am aware of changes to internet cookies in the future

Six out of 10 respondents (63%) say they are fully aware or think they are aware of changes to internet cookies in the future. Significantly more men (43%) than women (27%) say they are *fully* aware of these future changes.

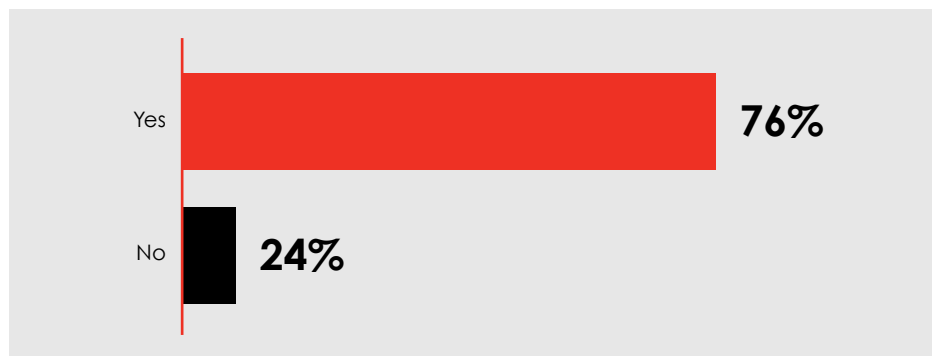
### I am aware of changes to internet cookies in the future



### Filtered by I fully understand, or think I understand what data privacy means



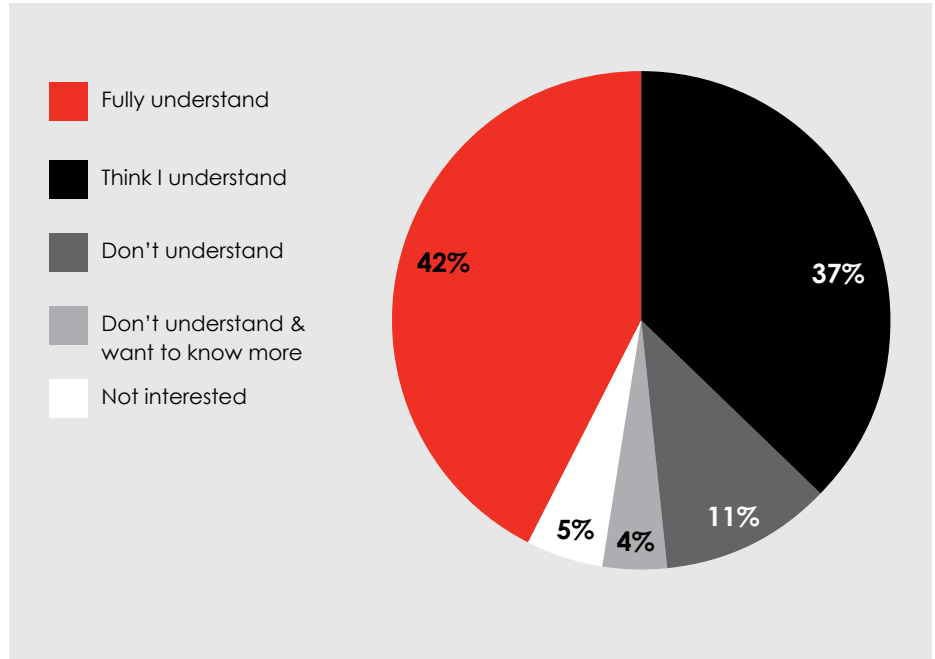
### Filtered by I fully understand, or think I understand what cookies do



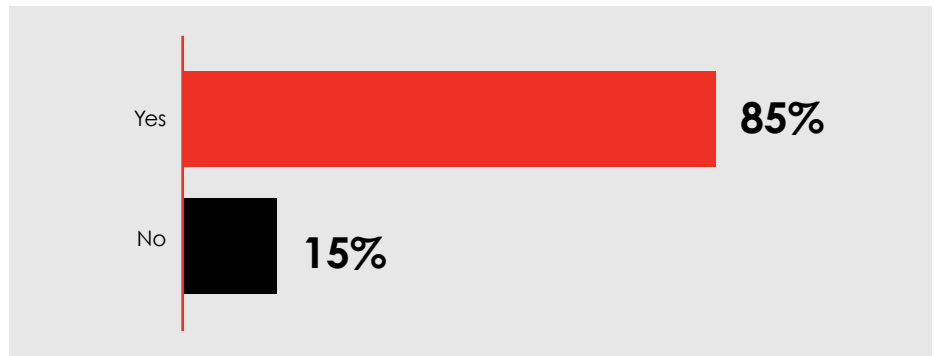
## I understand I will see advertisements online in exchange for access to free content

Eight out of 10 respondents (79%) fully understand or think they understand that they see online advertisements in exchange for access to free content. More men (48%) than women (37%) say they fully understand this.

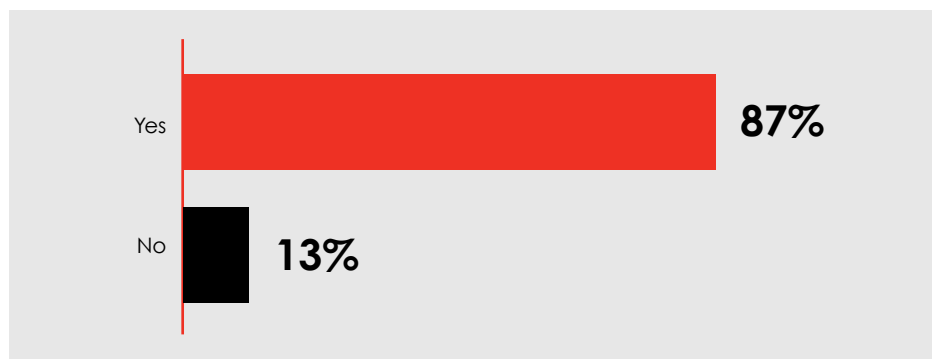
## I understand I will see advertisements online in exchange for access to free content



## Filtered by I understand, or think I understand what data privacy means



## Filtered by I understand, or think I understand what cookies do





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