

VIETNAM DIGITAL MUSIC LANDSCAPE 2024-2025

Professionalization, Co-Creation, & Explosion



TABLE OF CONTENTS

01

Foreword

02

Modern Portrayal of Vietnamese Digital Music Listeners 2025

03

Key Stakeholders in Vietnam Digital Music Landscape

04

10 Emerging Trends In Digital Music & What's Waiting Ahead

05

Appendices

FOREWORD - VIETNAM DIGITAL MUSIC LANDSCAPE 2024-2025



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2024 has witnessed remarkable growth and maturity in Vietnam's digital music market. The expansion of digital platforms, social media, and entertainment programs empowers artists to express their creativity, showcase their unique identities, and collaborate on innovative musical projects, bringing new and diverse music to audiences. This growth is further fueled by the increasing professionalization of the industry, with strong support from networks of service businesses, management entities, brand agencies, media companies, and fan communities. This vibrant ecosystem not only fosters artistic expression but also enriches the cultural landscape of Vietnam. As the industry continues to evolve, we can expect even greater achievements in the years to come.

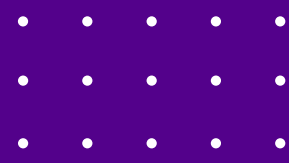
With the colorful and dynamic landscape of Vietnam's music scene, this is a golden opportunity for artists, networks of businesses in the industry, governing bodies, and music lovers to jointly build a professional, creative, and high-potential digital music market in Vietnam. However, what changes might we see in the factors that drive the success of this market? What is the roadmap for the sustainable development of artists, and how important is fandom establishment? What opportunities and challenges lie ahead for the sustainable and healthy development of the market? What are the next trends in Vietnamese music?

This report, *Vietnam Digital Music Landscape 2024-2025*, updated by the research team at the *School of Communication and Design, RMIT University Vietnam*, offers valuable insights into the Vietnamese music landscape in 2024 and forecasts music trends that will shape this industry in 2025.

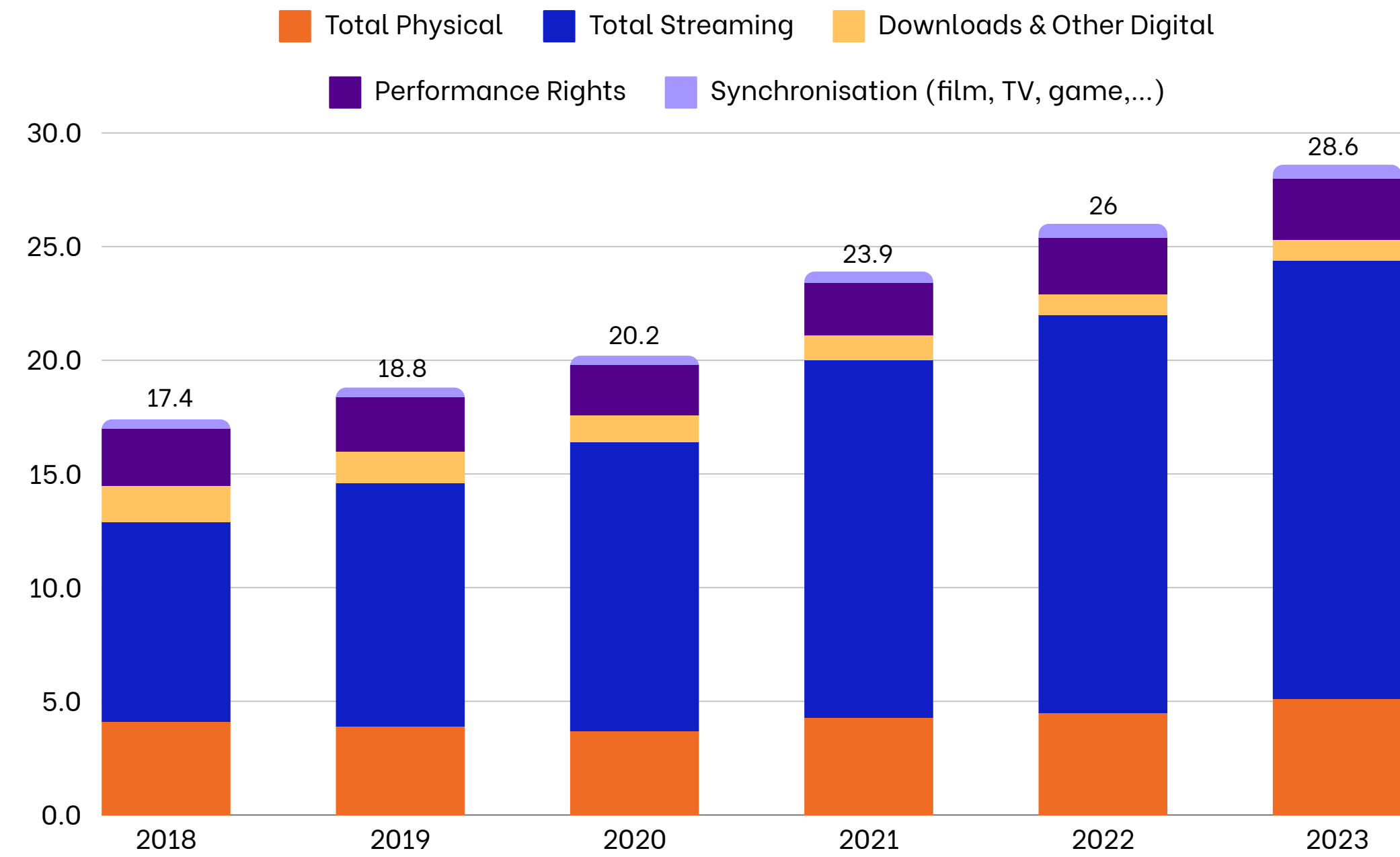
MODERN PORTRAYAL OF VIETNAMESE DIGITAL MUSIC LISTENERS 2025



OVERVIEW OF GLOBAL MUSIC LANDSCAPE



GLOBAL RECORDED MUSIC INDUSTRY REVENUES 2018-2023 (BILLION USD)¹



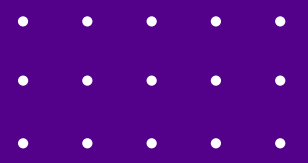
28.6 billion USD

revenue of global digital streaming 2023¹

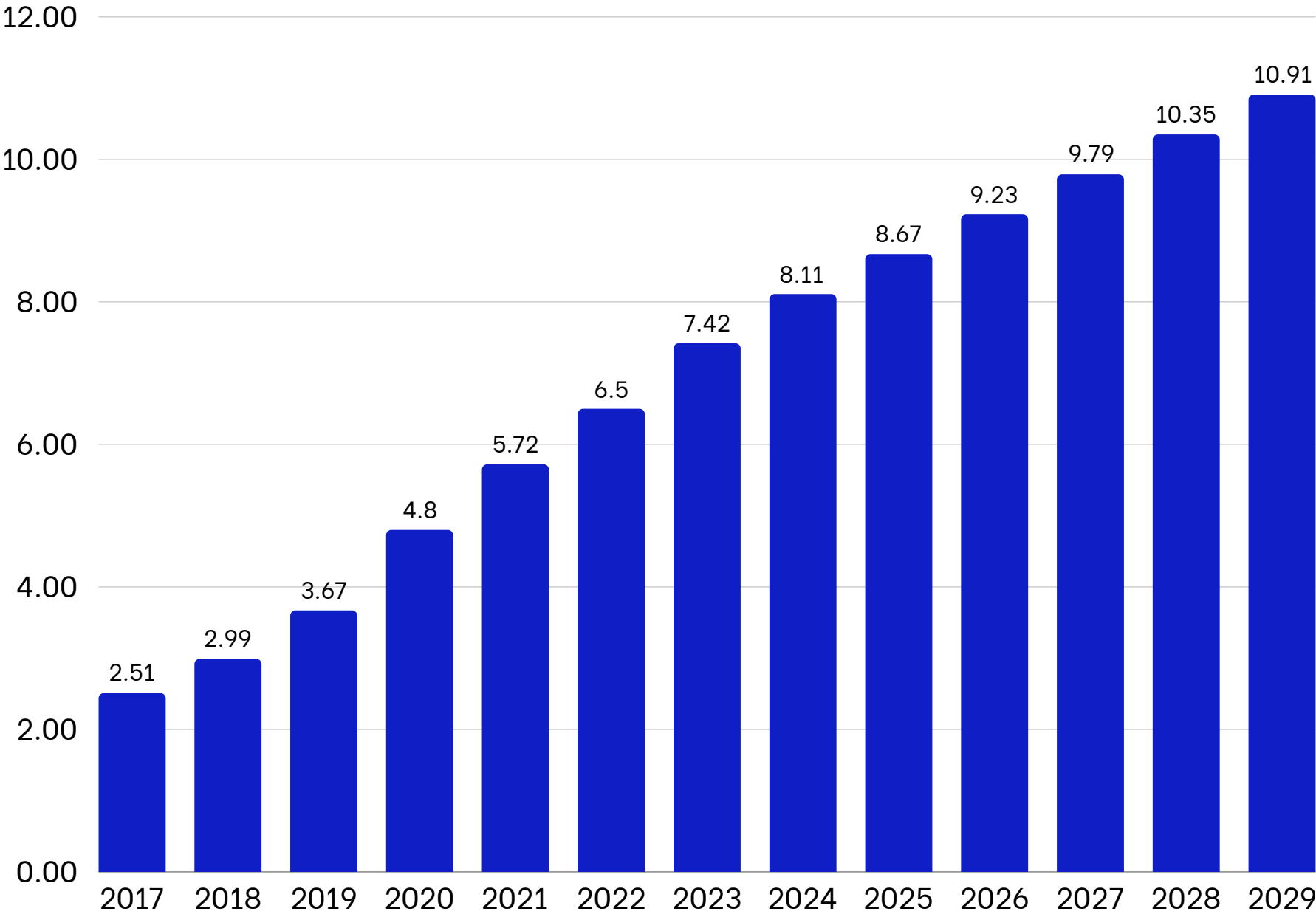
The global music industry is experiencing strong growth, with revenue reaching USD 28.6 billion as of 2023. This revenue comes from physical music sales, music streaming, music downloads, performance rights, and various music distribution channels. **Music streaming, is the largest source of revenue, generating USD 19.3 billion and accounting for more than half of the total industry revenue.**

¹ Global Music Report 2024 by International Federation of the Phonographic Industry (IFPI)

OVERVIEW OF ASIA'S MUSIC LANDSCAPE



ASIA'S DIGITAL STREAMING REVENUE FORECAST 2017-2029 (BILLION USD) ²



14.9%

growth in revenue of Asia's digital streaming 2023 ¹

Asia is solidifying its position as one of the world's most dynamic digital music markets, with an impressive revenue growth rate of 14.9% in 2023. Projected revenues are expected to reach USD 8.11 billion in 2024 and rise to USD 10.91 billion by 2027. **Asia's digital music market showcases a promising future, unlocking numerous opportunities for investors and artists alike.**

¹ Global Music Report 2024 by International Federation of the Phonographic Industry (IFPI)
² Digital Music - Asia by Statista Market Forecast



OVERVIEW OF VIETNAM'S CULTURAL INDUSTRY

The production value of Vietnam's cultural industries, including revenue and investment, from 2018 to 2022 is estimated to have contributed **VND 1,059 trillion (approximately USD 44 billion³) with an annual growth rate of 7.2%.**

Recognizing the crucial role of culture, the Vietnamese government has identified the development of the cultural industry as a priority. It aims to achieve fast, sustainable, and distinctive growth by leveraging digital platforms. Within this framework, **digital music is considered a key drive of development.**

#44 Worldwide

#4 Southeast Asia

Vietnam's rankings according to the Global Creativity Index about the growth level of the Creative Economy sector⁵

³ *Developing Vietnam's cultural industries rapidly, sustainably, uniquely, and with identity* by Nhan Dan Newspaper

⁴ *Directive from the Prime Minister on the development of Vietnam's cultural industries* by Government's Electronic Portal

⁵ *Vietnam climbed two spots in the 2024 Global Innovation Index* by the Ministry of Science and Technology

66

“Under the guidance of the government, Vietnam’s cultural industry is becoming a vital pillar of the national creative economy. By harmonizing creativity, production, and commercialization, the industry not only generates significant economic value but also contributes to preserving and enhancing the nation’s cultural identity. The potential for sustainable growth, particularly in digital music, will serve as a strong impetus for Vietnam to affirm its position on the global cultural industry map.”

Dr. Donna Cleveland

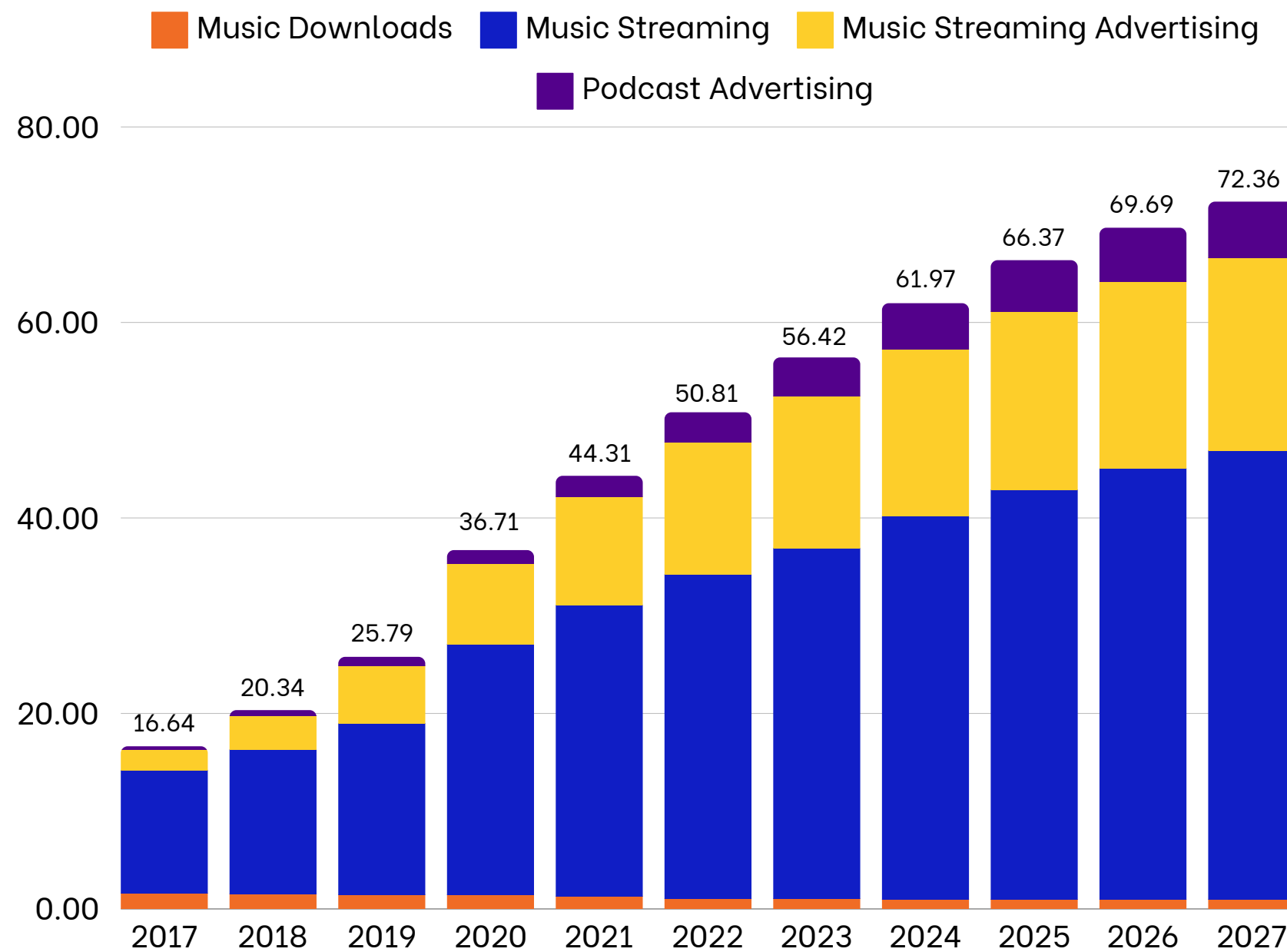
Associate Professor

Dean of the School of Communication and Design
at RMIT University Vietnam



OVERVIEW OF VIETNAM'S DIGITAL MUSIC LANDSCAPE

VIETNAM DIGITAL AUDIO MARKET FORECAST 2017-2027 (MILLION USD)²



In Vietnam, **revenue from online music streaming dominates, with projections reaching nearly USD 40 million in 2024.** Digital audio advertising ranks second, with approximately USD 20 million, highlighting the significant potential of this business model. Although podcast advertising remains modest, it is developing rapidly with high growth rates. The overall market is forecasted to grow at a rate of 8-10% annually, reaching a revenue of USD 72.36 million by 2027.

47.7%

Internet users accessing digital platforms to listen to music⁶

61.4%

users listening to music through digital platforms⁷

40 million USD

digital music revenue in Vietnam in 2024²

1 hour 8 mins

time spent by users listening to music on digital platforms⁸

² Digital Music - Vietnam by Statista Market Forecast

⁶ Digital 2024: Vietnam (Main reasons to use Internet) by We Are Social

⁷ Digital 2024: Vietnam (Social media usage) by We Are Social

⁸ Digital 2024: Vietnam (Daily duration used for social media) by We Are Social

VIETNAMESE MUSIC ON THE SOUTHEAST ASIA MAP

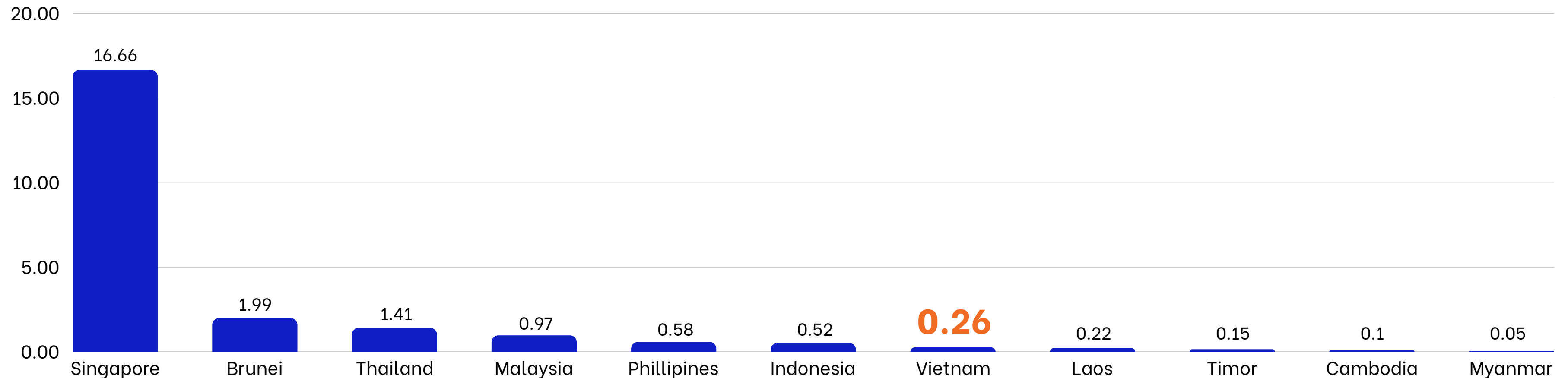


With an average revenue per capita of USD 16.66, Singapore has created a significant gap compared to other countries in the region. Vietnam, in comparison, stands at only USD 0.26, currently ranked 7. However, **Vietnam possesses a digital music market with immense development potential. With the right strategies and investments, Vietnam market is poised for significant growth in the coming years.**



Vietnam's ranking in Southeast Asia in average monthly revenue per capita in the digital music market^{9,10}

MONTHLY REVENUE PER CAPITA IN SOUTHEAST ASIA MUSIC MARKET 2024 (USD)^{9,10}

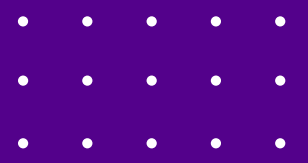


⁹ Southeast Asia Music Revenue by Statista Market Forecast

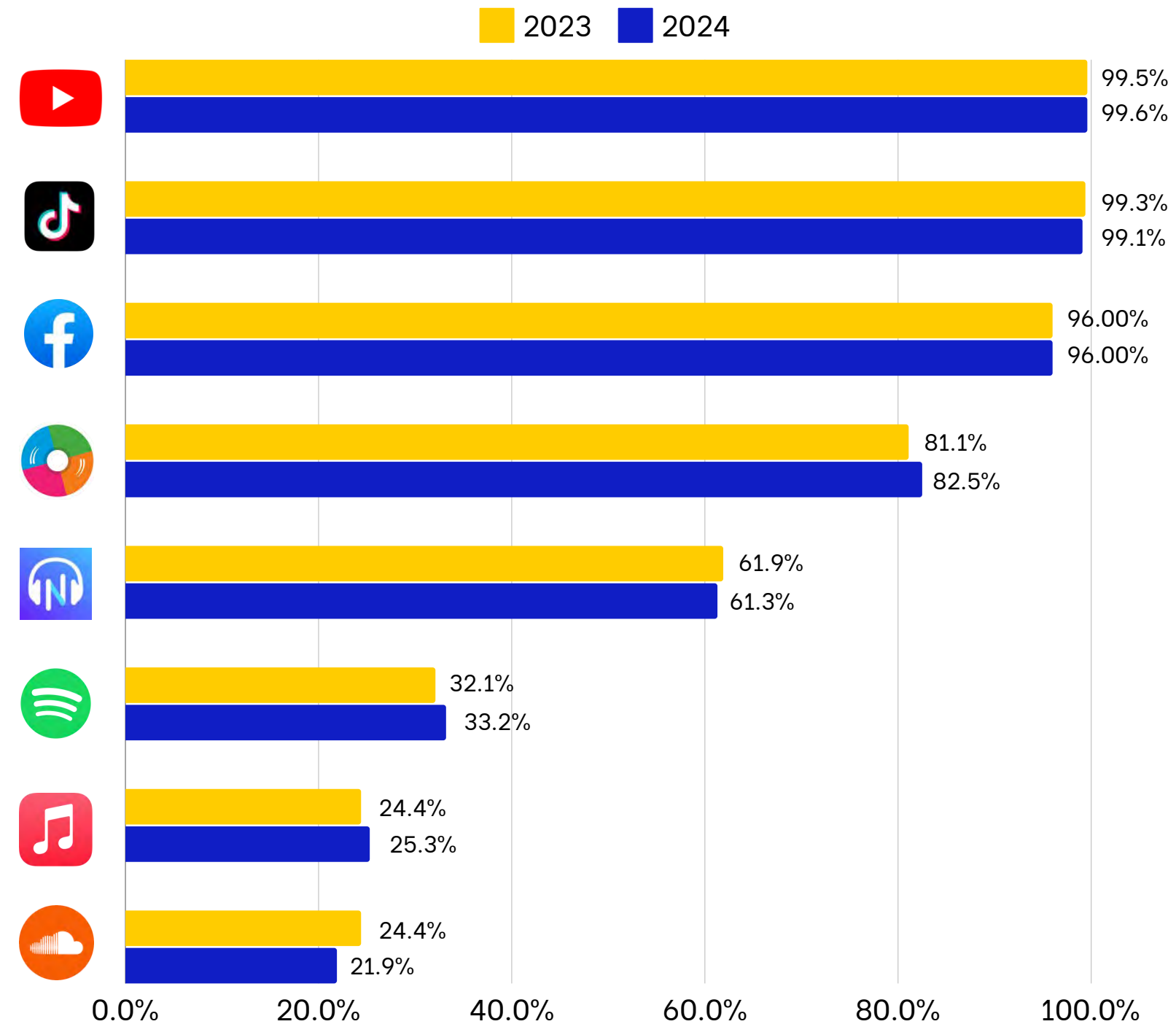
¹⁰ Population data of Southeast Asia by Worldometer

*The figures above were calculated using: [Total revenue by country] / [Total population by country]

VIETNAMESE MUSIC LISTENERS: PLATFORMS



POPULAR MUSIC STREAMING PLATFORMS



YouTube (99.6%) has maintained its top spot over the past 2 years due to its market expansion and provision of high-quality music services with advanced personalization capabilities, attracting more users. **TikTok (99%)** ranks 2nd thanks to the popularity of short videos and the rapid spread of song trends. **Facebook (96%)** remains 3rd on the ranking, highlighting the strength of this social media platform in connecting users and sharing music content.

1 YouTube

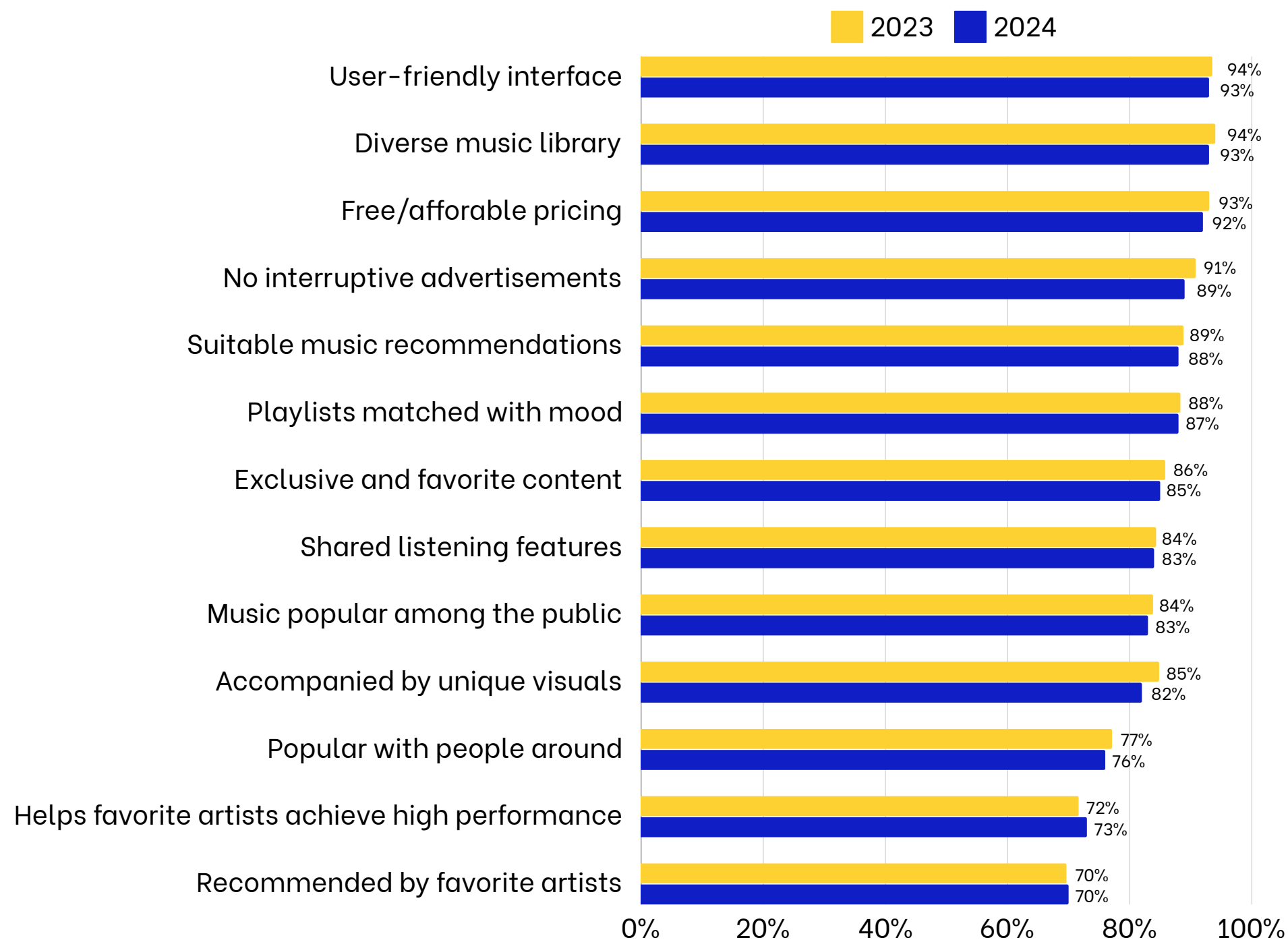
2 TikTok

3 Facebook

*Q: In the past month, on which platforms have you listened to music?

VIETNAMESE MUSIC LISTENERS: PLATFORMS

CRITERIA FOR CHOOSING A MUSIC STREAMING PLATFORM

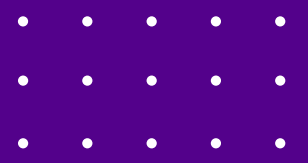


*Q: What factors do you consider when listening to music on platforms?

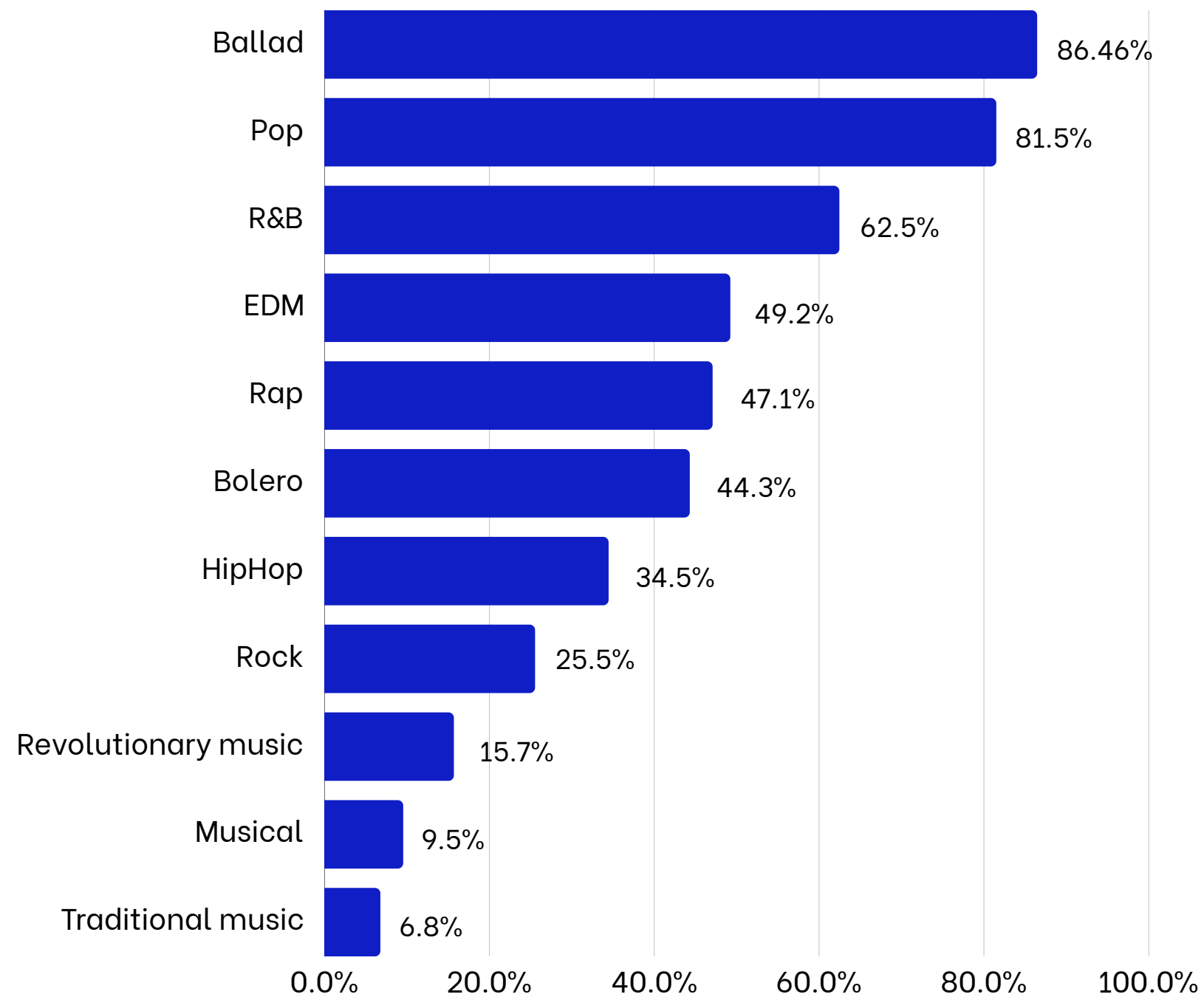
In both 2023 and 2024, users highly valued three key factors when choosing a music platform: **a user-friendly interface (93%)**, **a diverse music library (93%)**, and **free/low pricing (92%)**. However, there has been a noticeable shift in usage trends, as users increasingly prioritize convenience and smooth user experience (interface) over merely focusing on the volume of available music (library size).

- 1 User-friendly interface**
- 2 Diverse music library**
- 3 Free/affordable pricing**

VIETNAMESE MUSIC LISTENERS: GENRES



FAVORITE MUSIC GENRES

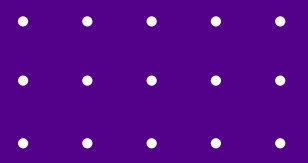


*Q: Which music genre do you prefer?

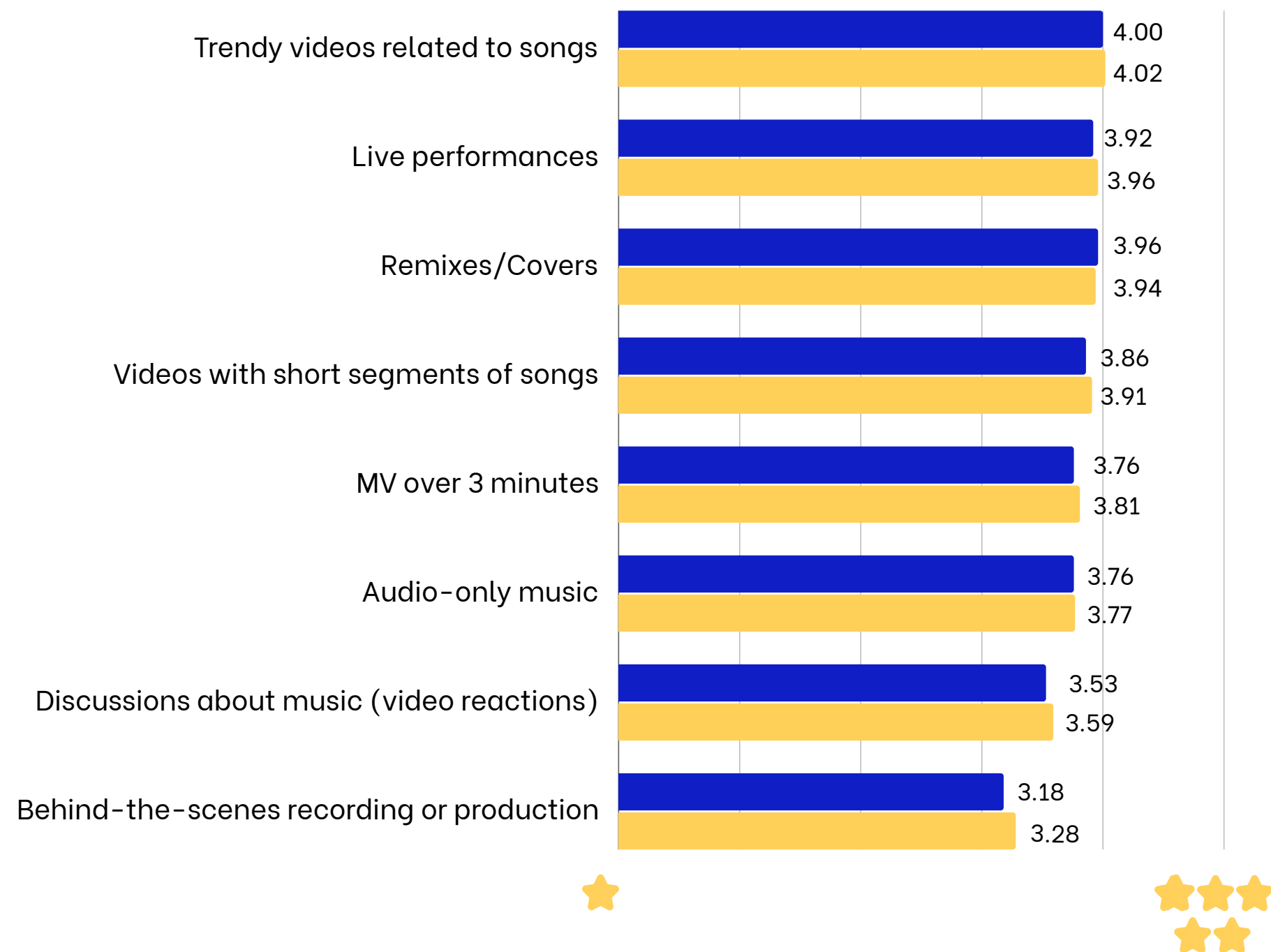
The Vietnamese music market this year has witnessed significant changes in preferences and listening trends among the public, reflecting diversity and richness across various music genres. Specifically, **Ballad** leads with 86.5%, showing a strong preference for gentle, emotional tracks. Following closely is **Pop** at 81.5%, thanks to its broad appeal and catchiness. Genres such as **R&B** (62.5%), EDM (49.2%), and Rap (47.1%) are also among the most favored, marking their importance in the development of contemporary music in Vietnam.

- 1 **Ballad**
- 2 **Pop**
- 3 **R&B**

VIETNAMESE MUSIC LISTENERS: PREFERENCES



FAVORITE MUSIC-RELATED CONTENT

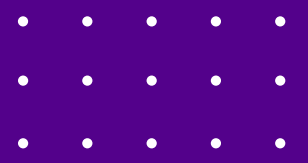


The trend of consuming online music content in 2024 revolves around **trendy videos related to songs, live performances, and remixes/covers**. These types of content are often easily accessible and quickly establish a connection with viewers on digital platforms. Not only do they deliver a dynamic music experience, but they also emphasize the interaction between artists and audiences, strengthening their engagement with music. Notably, **live performances have become increasingly popular compared to 2023, thanks to the rise of music events (concerts, live shows)**.

- 1 Trendy videos related to songs**
- 2 Live performances**
- 3 Remixes/Covers**

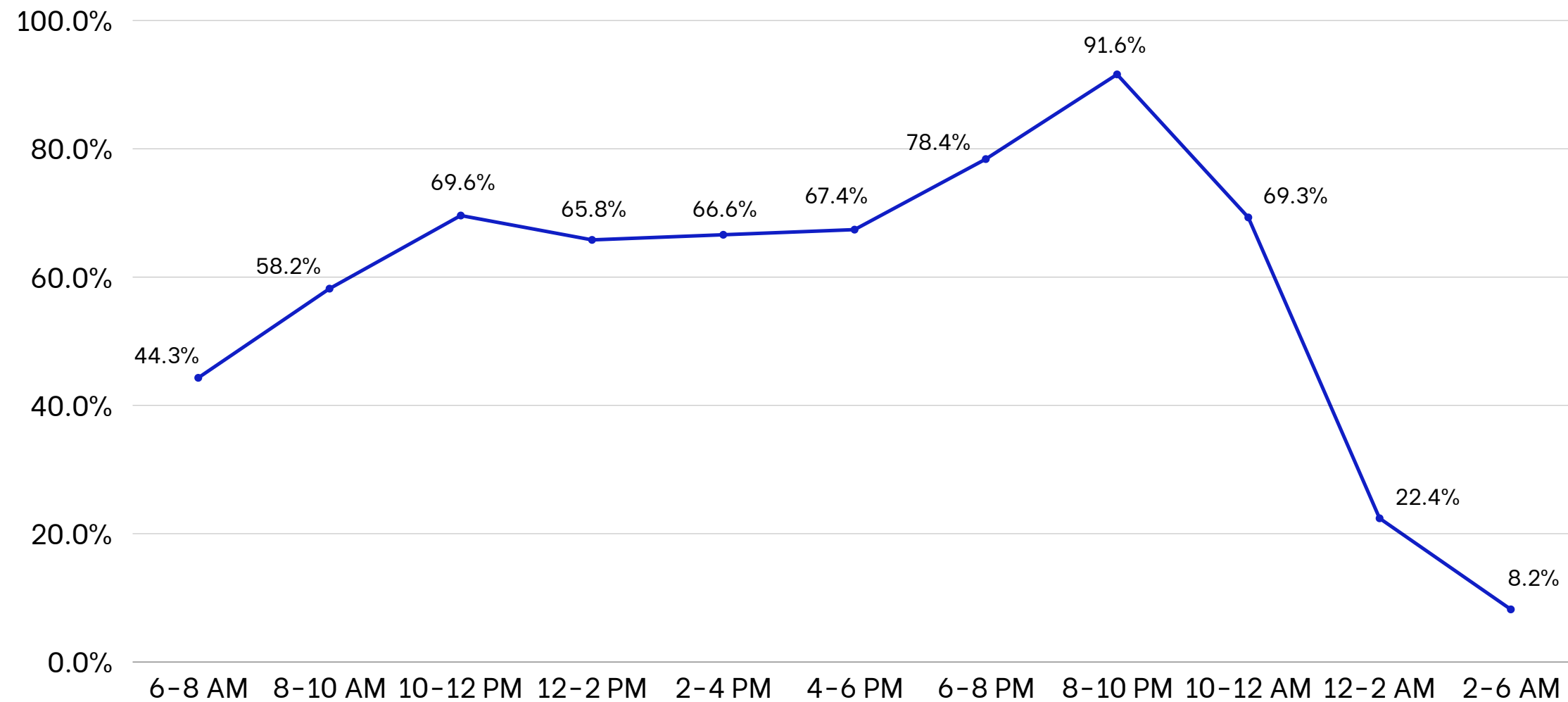
*Q: Which types of content related to music do you prefer on a scale of 1-5?

VIETNAMESE MUSIC LISTENERS: TIME

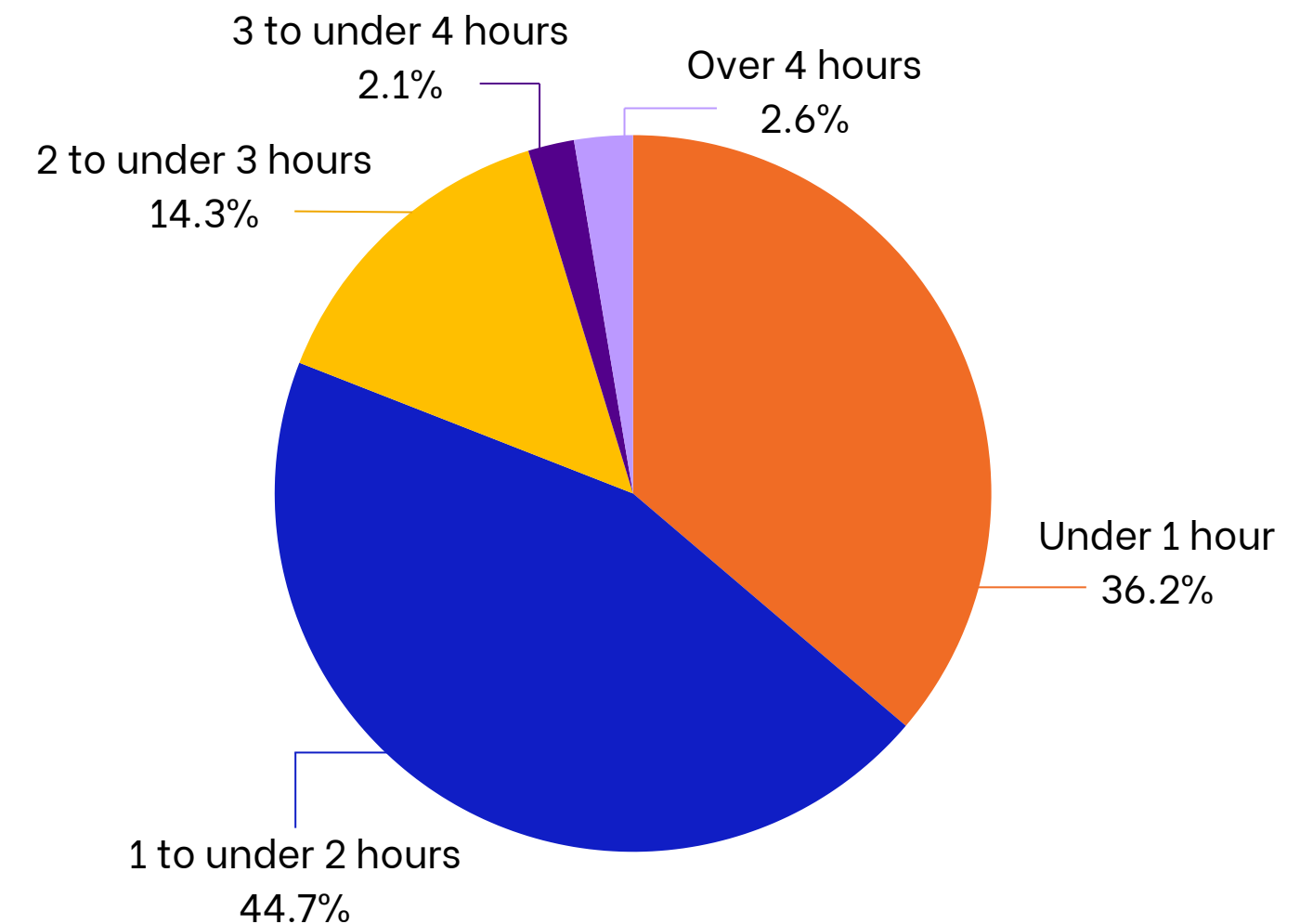


The most common duration people spend listening to music daily ranges from **1 to under 2 hours per day**. In 2024, users tend to listen to music during **the evening (6 PM - 12 AM)** to relax after a long day, or during **10-12 PM** when higher concentration is needed for work or study. This change contrasts with 2023 when users primarily listened during early mornings (6-7 AM) or late nights (10 PM - 2 AM). The shift is attributed to the appearance of music programs aired at corresponding times.

FAVORITE TIME FOR MUSIC STREAMING



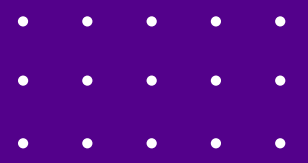
DAILY TIME SPENT LISTENING TO MUSIC



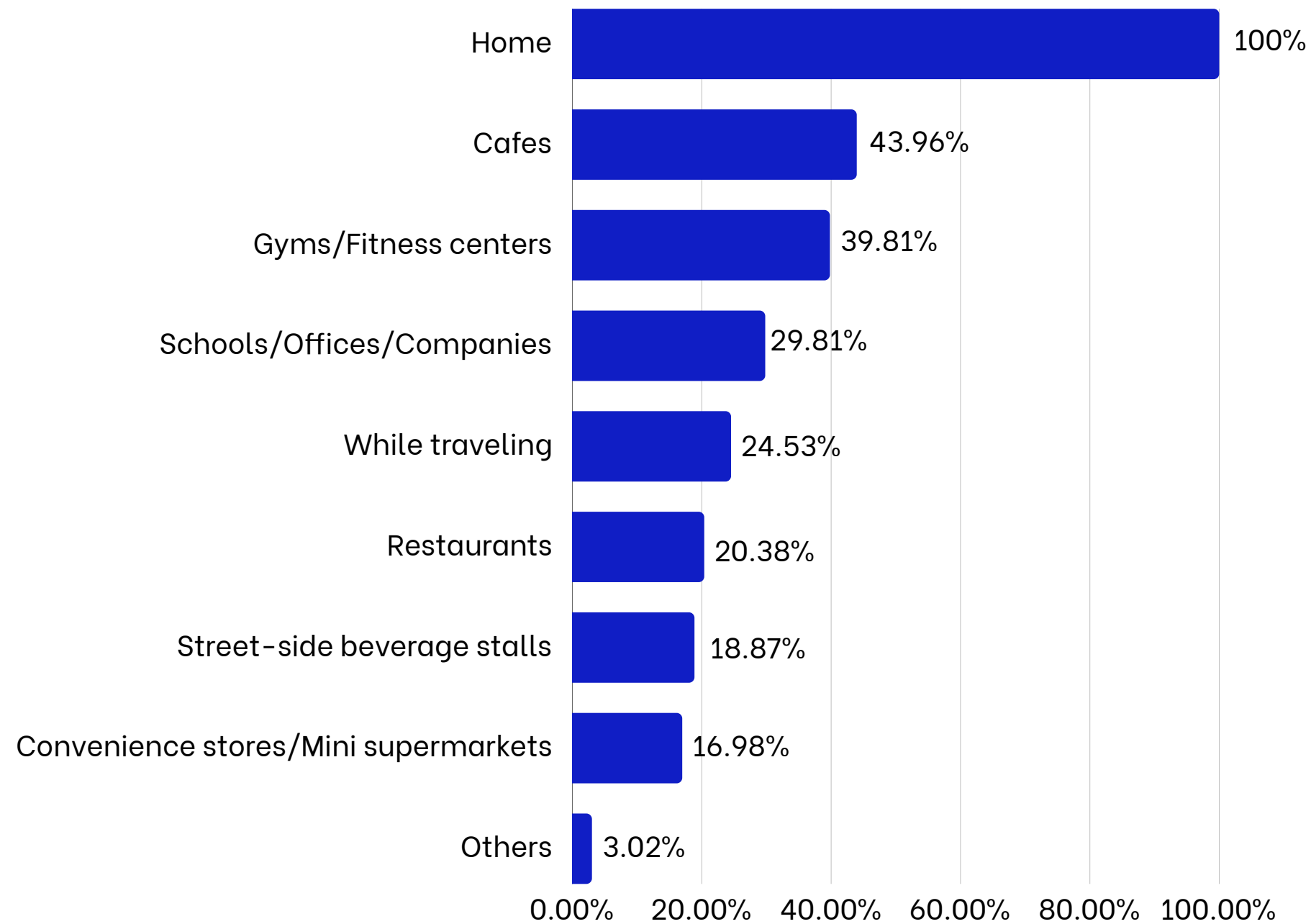
*Q: During which time slots do you typically listen to music in a day?

**Q: How much time do you allocate to listening to music daily?

VIETNAMESE MUSIC LISTENERS: LOCATIONS



POPULAR LOCATIONS FOR MUSIC STREAMING

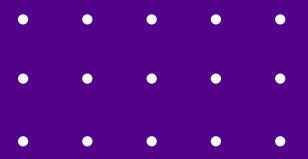


Listeners today enjoy music in various spaces. However, 100% of users agree that home is the ideal place to listen to music. This is because **home provides a private, comfortable space where people can combine listening to music with daily activities** such as relaxing, working, or resting. In addition, cafes (43.96%) and gyms (39.81%) are also popular spots, as **these locations offer environments conducive to enhancing the experience and enjoyment of music.**

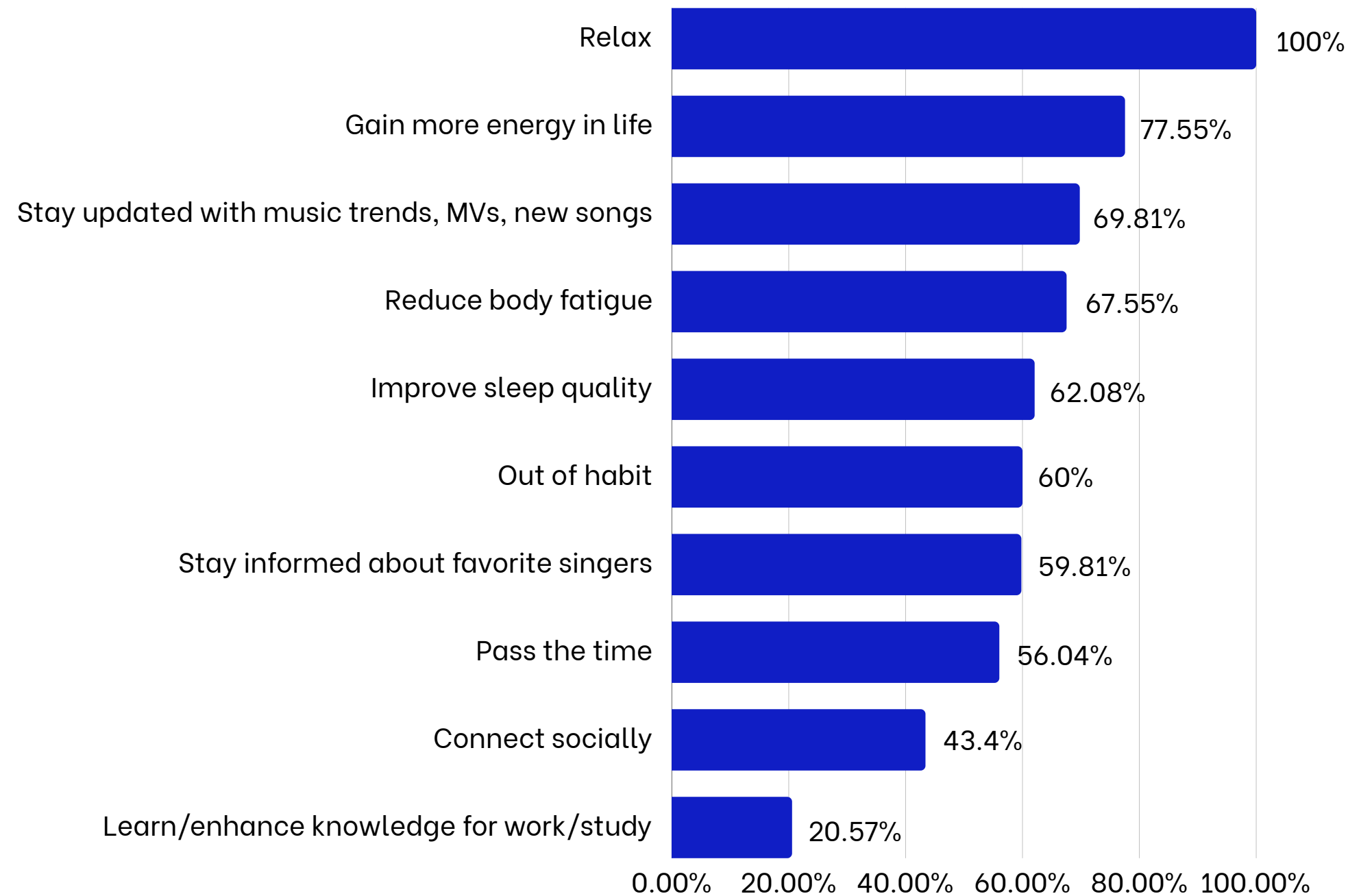
- 1 **Home**
- 2 **Cafes**
- 3 **Gym/Fitness centers**

* Q: Where do you usually listen to music from the following locations?

VIETNAMESE MUSIC LISTENERS: MOTIVATIONS



POPULAR MOTIVATIONS FOR MUSIC STREAMING



Music possesses a magical power in enhancing the **quality of life**.¹¹ Music not only helps with relaxation (100%) and alleviates stress (77.55%) to face daily challenges but also serves as a means to stay updated with the latest trends (69.81%). Regular music listening supports physical and mental health, such as reducing body fatigue (67.55%) and improving sleep quality (62.08%).

- 1 Relax**
- 2 Gain more energy in life**
- 3 Stay updated with trends**

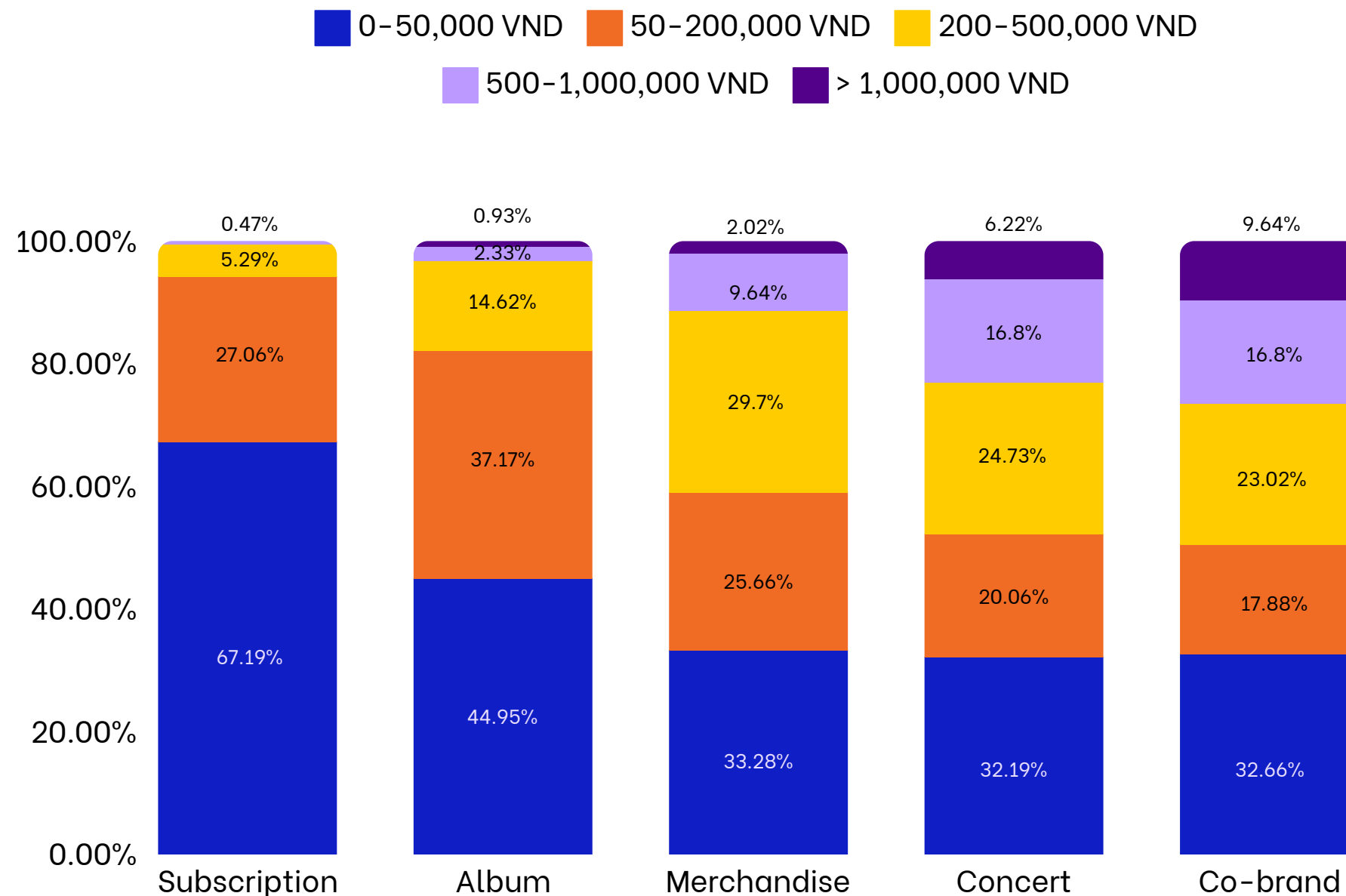
* Q: Why do you listen to music?

¹¹ *Mental health benefits of music therapy for young audiences* by ProQuest LLC

VIETNAMESE MUSIC LISTENERS: PURCHASE POWER



AVERAGE MONTHLY SPENDING ON MUSIC-RELATED PRODUCTS



Complete List of Music-Related Products:

- Subscription packages for digital music platforms
- Albums/Singles/Physical records
- Merchandise (e.g., lightsticks, T-shirts, photobooks, etc.)
- Concerts/Liveshows/Fan events
- Co-branded products with artists (e.g., Son Tung M-TP x Biti's Hunter, etc.)

Fans express their loyalty through their willingness to spend on various types of products. Among these, co-branded products featuring artists are the most prominent, with the majority of users spending over 1 million VND for premium items, while subscription packages and albums/singles are more favored in the more accessible price range. Despite the diversity of products, **the average spending of fans focuses on around 50,000 VND, indicating an easy approach for fans to access products related to their idols.**

“As a Vietnamese fan, I am always ready to spend money to support my favorite idol, from buying albums and merchandise to attending concerts. With my deep love for the artist, I don’t hesitate to invest in memorable music experiences. The financial strength and passion of Vietnamese fans have proven that we are not only a strong force but also active supporters in the artist’s journey.”



Ms. Pham Ngoc Minh

Office worker – Music fan



*Q: What items related to music are you willing to spend money on?

KEY STAKEHOLDERS IN VIETNAM'S DIGITAL MUSIC LANDSCAPE

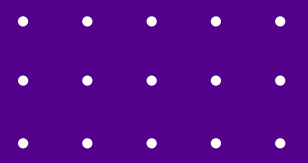




ARTISTS - KEY FACTOR IMPACTING MUSIC LISTENERS

Artists are at the heart of Vietnam's music industry. They not only represent and convey the emotions and messages of musical works through their voices and performances but also breathe life into melodies and lyrics. By forming emotional connections with fans, they help affirm the influence of music. Vietnamese artists are actively preserving and promoting the uniqueness of Vietnam's music to the global audience. Through their music, they are narrowing cultural gaps between nations, fostering understanding and appreciation for Vietnamese culture. Their professional image and quality music help attract diverse audiences worldwide. While facing challenges such as language barriers and intense competition, Vietnamese artists, with the support of management agencies, distributors, and fans, are steadily solidifying their position in the international music scene. As Vietnamese music continues to evolve and innovate, we can expect its artists to play an even greater role in shaping the future of the global music landscape

CAREER JOURNEY OF MUSICAL ARTISTS



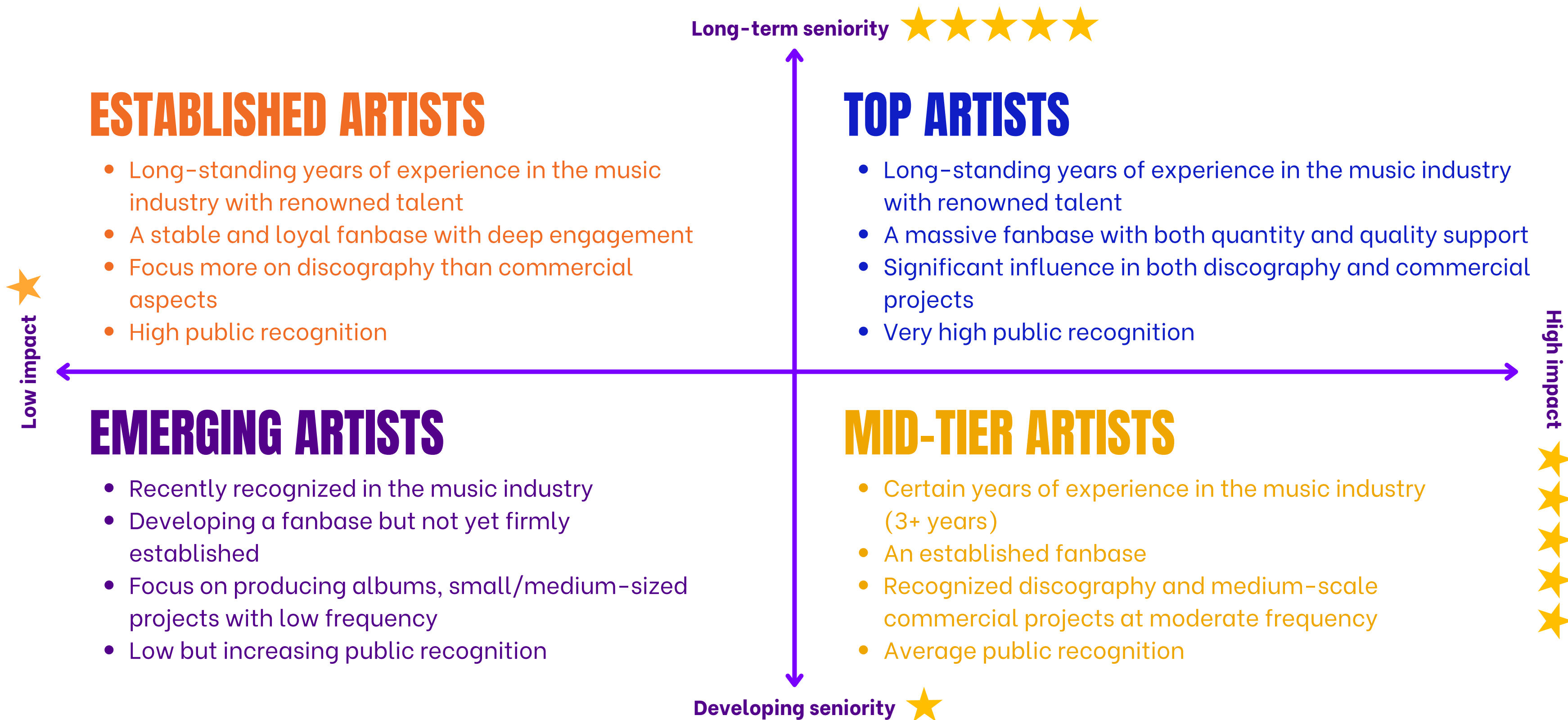
Disclaimer: The categorization herein is based on research analysis and is intended for reference only.

Core Strategies	Main Activities	Begin	Development	Growth	Completion	Legacy
Creative Development	Songwriting & Music Production	★★★★★	★★★★★	★★★★	★★★	★★
Career Orientation	Visual & Personal Branding Definement Build Online Presence Initial Fan Engagement	★★★★	★★★★★	★★★★	★★★★	★★★
Public Engagement & Digital Promotion	Live Performances Streaming & Digital Promotion Fan Club Development	★★★	★★★★	★★★★★	★★★★★	★★★★
Commercial Partnerships & Market Expansion	Brand Ambassadorships Touring & International Expansion Merchandise Sales	★★	★★★	★★★★★	★★★★★	★★★★
Legacy Building & Strategic Influence	Mentorship & Influence Strategic Partnerships & Legacy Projects	★	★★	★★★	★★★★	★★★★★

★	★★	★★★	★★★★	★★★★★
Minimal importance – Almost no focus or relevance at this stage.	Low importance – Rarely prioritized, minimal effort or focus required.	Moderate importance – Necessary but not central to growth or progress.	High importance – Critical for success and growth, significant effort required.	Maximum importance – Absolutely essential for long-term success and sustainability.

ARTIST CATEGORIZATION BASED ON CAREER JOURNEY & IMPACT

Disclaimer: The categorization herein is based on research analysis and is intended for reference only.



* Seniority is measured by the level of public recognition (as evidenced by major awards, solo performances, a consistent and loyal fanbase over time)

* Influence is determined by fan engagement (number of fans), and commercial viability (performances, brand collaborations, etc.)

ESTABLISHED ARTISTS: SPOTLIGHT

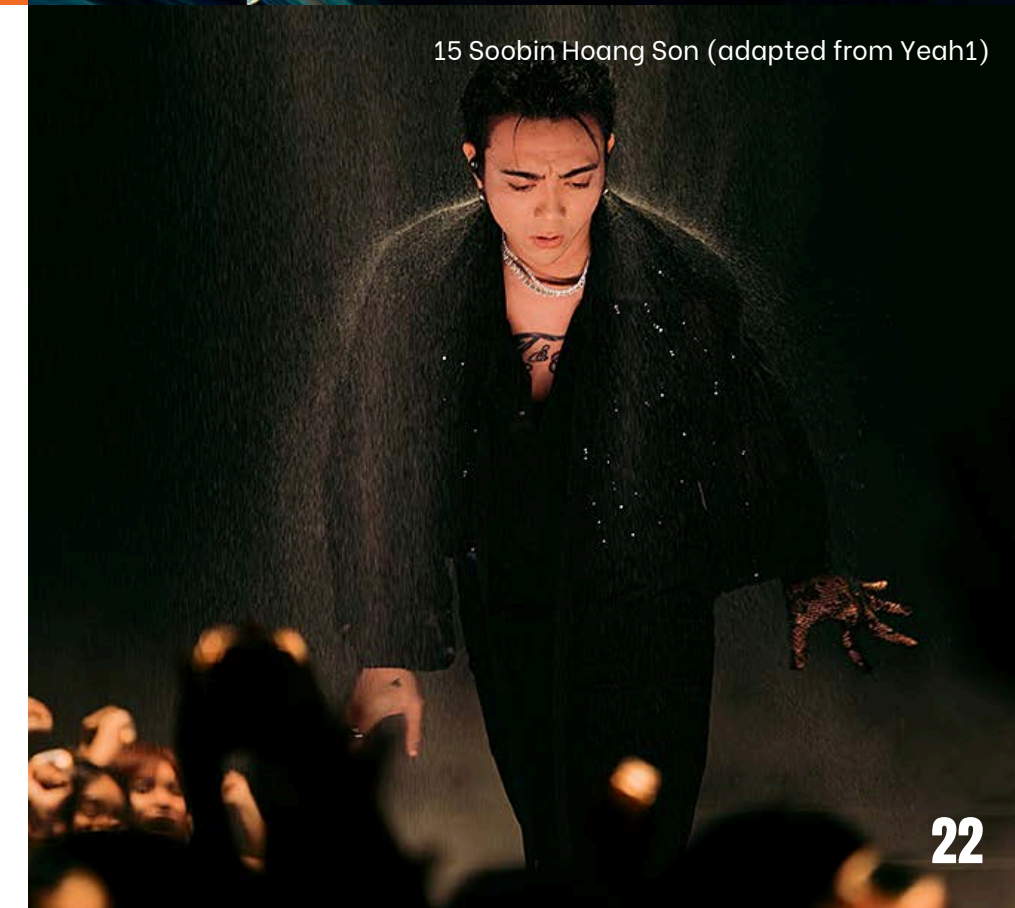
MY LINH & SOOBIN HOANG SON

In 2024, My Linh continued to solidify her position as a top Diva through numerous notable activities. She shone brightly when participating in the show *Chi Dep Dap Gio Re Song*, earning the title *Sister of the Year* thanks to her ability to convey authenticity and charisma, affirming her comeback as a key figure of the show's second season.¹² My Linh also made her mark by performing at prestigious events such as the *Nha Trang International Jazz Music Festival* and musician *Duc Huy's Live Concert*. Additionally, her appearances at widely discussed events like *Live Tour May Lang Thang* and *Miss Universe Vietnam 2024* highlighted the perfect blend of artistry and commercial appeal. Together with her iconic performance style, My Linh has become an exemplary established artist, maintaining her top-tier position for over a decade.

Soobin Hoang Son achieved numerous remarkable milestones in 2024, marking 10 years of his music career.¹³ In April 2024, he released his debut album *Bat No Len* alongside the MV *Gia Nhu*, which quickly reached #1 on domestic YouTube Music charts, garnering 80 million views and widespread attention through the #GiaNhu hashtag on TikTok. Around the same time, Soobin left an impression during *Anh Trai Vuot Ngan Chong Gai* reality show, particularly with his rendition of the iconic *Trong Com*, which went viral on YouTube and became a popular meme. Notably, he won the *Most Favorite Brother* award at the show's finale, further demonstrating his ability to attract fans and ever-increasing influence.

¹² *Trang Phap cried as she lost, My Linh won Sister of the Year award by Vietnamnet*

¹³ *Soobin - from a prodigy to a beloved star by VnExpress E-Newspaper*



TOP ARTISTS: SPOTLIGHT

SON TUNG M-TP, MY TAM & HA ANH TUAN

Son Tung M-TP continues to solidify his position as a top-tier artist in 2024 through a series of remarkable successes. His two songs, *Chung Ta Cua Tuong Lai* and *Dung Lam Trai Tim Anh Dau*, created waves on social media, amassing 69 million and 100 million views on YouTube, respectively. Additionally, he serves as an ambassador for major brands like Ponnie, MBBank, and Modern. His recent performance at *Viettel Y-Fest 2024* in Hanoi and the launch of his exclusive merchandise line *BE THE SKY* further highlighted his influence.¹⁶ With over 22 million followers on Facebook and Instagram, Son Tung M-TP consistently ranks among the top 10 most influential figures on social media, maintaining his powerful impact.¹⁷

My Tam leaves her mark with sold-out liveshow *My Soul 1981* across various provinces in Vietnam. She also made significant contributions to major cultural events such as *Da Nang Enjoy Festival 2024* and the *HoZo 2024 International Music Festival*. My Tam impressed fans by selling 1,570 *Tri Am* DVDs in just 1 minute.¹⁸ Meanwhile, Ha Anh Tuan continues to demonstrate his unique appeal in engaging his loyal fanbase—those who accompany him at every performance, from the *Storii Concert* in Hanoi to the *Sketch A Rose Concert* in Singapore and Australia, attracting nearly 6,000 attendees.¹⁹

¹⁶ Announcement of Be The Sky Project by Tuoi Tre Newspaper

¹⁷ Top 10 Influential Figures Data Report by Buzzmetrics

¹⁸ My Tam's 3-Hour Sold-Out DVD Sales by Thanh Nien Newspaper

¹⁹ Sketch A Rose Concert Success in Hanoi and Abroad by Bazaar Vietnam



20 Son Tung MTP (adapted from 24 Hour)



21 My Tam (adapted from Thanh Nien Newspaper)



22 Ha Anh Tuan (adapted from The thao-Van hóa)

MID-TIER ARTISTS: SPOTLIGHT

HIEUTHUHAI, DUC PHUC & AMEE

HIEUTHUHAI had a breakthrough year in 2024 with significant success from the reality show *Anh Trai Say Hi*, where he won the championship thanks to his exceptional songwriting, performances, charisma, and hit collaborations in the show such as *Ngao Ngo* and *Kim Phut Kim Gio* which topped the trending chart on YouTube Vietnam.²³ He further solidified his status through Season 3 of *2 Ngay 1 Dem* reality show and major events such as *Hypalooza Summer Festival 2024* and *Viettel Y-Fest 2024*. With collaborations with prominent brands like Grab, Sting, Blanc 1664, and Closeup, HIEUTHUHAI boasts over 4 million followers on Facebook and Instagram, consistently ranking among the top 10 most influential figures on social media.¹⁷

Duc Phuc made a remarkable impact with the songs *Di Chua Cau Duyen* and *Ngay Dau Sau Chia Tay* (4.7 and 13 million YouTube views). Additionally, his *Tet Cui Vui Lay Via* MV in collaboration with Lay's reached 19 million views. Duc Phuc also showcased his musical talent, securing 5th place in the *Anh Trai Say Hi* show.²⁴ Meanwhile, AMEE ended her four-year hiatus with EP *MONGMEE* and its single *Mong Yu* (9.2 million YouTube views), ranking 1st and 3rd on Apple Music and YouTube Vietnam charts, respectively. Keywords related to this MV consistently topped trending searches on social media.²⁵

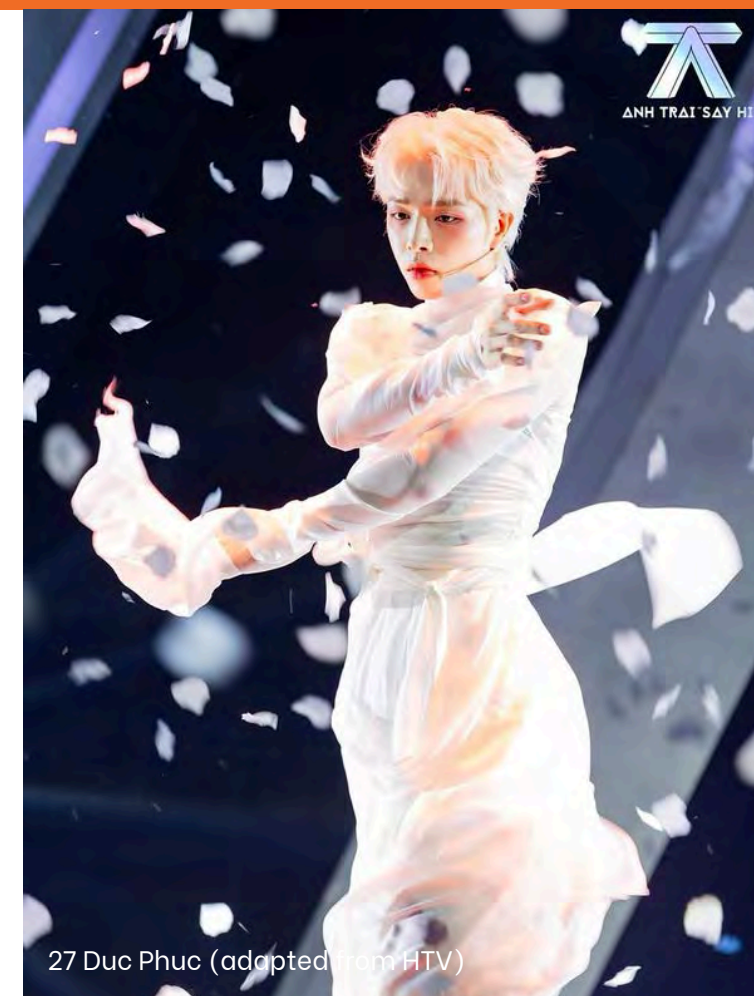
²³ *Rapper HIEUTHUHAI: From "ordinary person" to "Anh Trai Say Hi" champion* by Nguoi Dua Tin

²⁴ *Duc Phuc's 9-Year Journey: Highlighting Musical Talent in "Anh Trai Say Hi"* by Tuoi Tre Newspaper

²⁵ *"Mong Yu" by AMEE Conquers Vietnamese Charts* by Dien Anh Magazine



26 HIEUTHUHAI (adapted from 24Gio)



27 Duc Phuc (adapted from HTV)



28 AMEE (adapted from Facebook)

EMERGING ARTISTS: SPOTLIGHT

RHYDER, QUANG HUNG MASTERD & DUONG DOMIC

RHYDER, winner of *Giong Hat Viet Nhi 2013*, experienced a resurgence in popularity in 2024 through his appearance in *Anh Trai Say Hi*, securing the runner-up position. Known for songwriting and performances of hits like *Hao Quang* (20 million views) and *Anh Biet Roi* (9 million views), RHYDER quickly entered the top trending charts on YouTube and became one of the top 10 most influential social media figures in the past 3 months.³¹ Additionally, he boasts 1.6 million monthly listeners on Spotify, with tracks featuring rapper Andree Right Hand and WOKEUP *Dan Choi Sao Phai Khoc* and *Sieu Nhan Khong Biet Bay* collaborating with P/S, as well as performances at major events like *Prime's Night Concert* by VPBank, attracting thousands of fans.³⁰

Anh Trai Say Hi show remains a strong platform to promote emerging artists. Quang Hung MasterD, previously favored in Thailand even more than in his home country, returned to Vietnam with impactful performances, achieving 4th place in the finale. His two fan meetings were sold out, dominating music discussions in October 2024.³¹ Meanwhile, Duong Domic showcased his versatility through singing, rapping, dancing, and playing instruments, steadily building a larger fan base and making his recent track *Mat Ket Noi* top the YouTube Vietnam chart.³² With such successes, both artists are in the top 10 most influential social media figures over the past 2 months.¹⁷

29 Quang Anh Rhyder: From a Village Boy to "Anh Trai Say Hi" Star by Dan Tri Newspaper

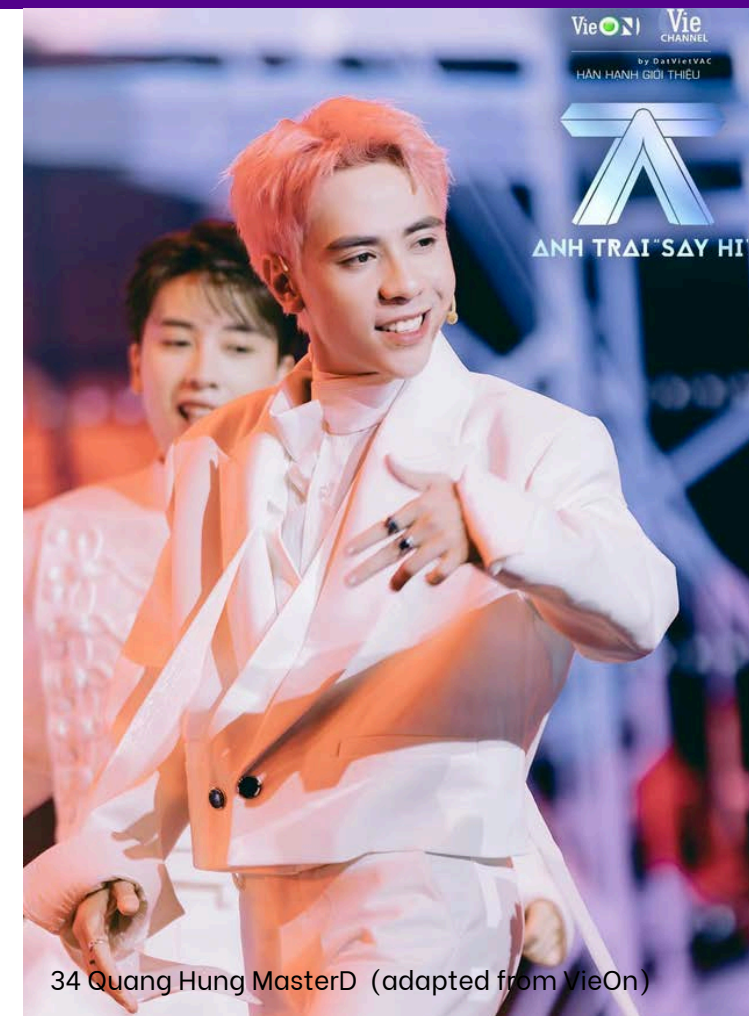
30 RHYDER, Anh Tu shine in Prime's Night Concert by Tien Phong Newspaper

31 From Thailand's National Crush to Vietnam's Star Performer by Kenh14

32 "Anh Trai" Duong Domic Breaks into 2024's Top Music Trends by Vietnamnet



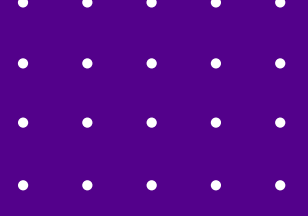
33 RHYDER (adapted from VieOn)



34 Quang Hung MasterD (adapted from VieOn)



35 Duong Domic (adapted from VieOn)



36 Vu Cat Tuong's fans with lightsticks (adapted from Kenh 14)

Fans are among the most significant factors in an artist's success. The relationship between artists and fans often forms naturally as fans are attracted to the artist's music and image. Especially, loyal fans (superfans) voluntarily support artists by engaging in various activities, from online interactions to attending live events. There are four types of fans:

Non-fan

No particular interest in artists; may know them via social media but do not actively listen or seek further.

Music Fan

Enjoy music in general but are not attached to any specific artist, following diverse genres with minimal interaction.

Casual Fan

Interested in specific artists, following them on social media and listening regularly but with limited time or financial investment.

Superfan

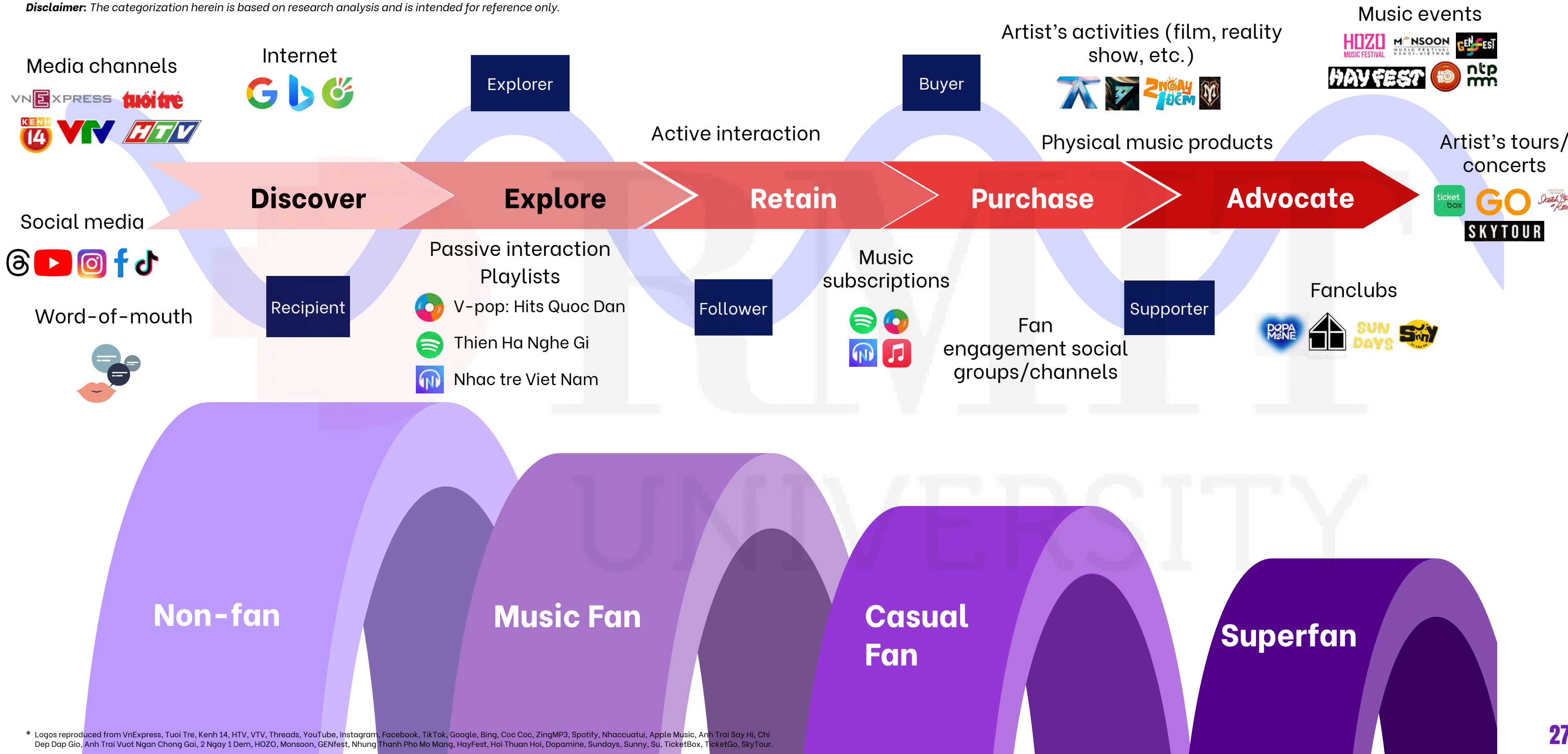
The most loyal, actively supporting artists by buying albums, attending shows, and spending time and money on following them.

17%

of expatriates living in Vietnam listen to Vietnamese music or artists³⁷

MUSIC JOURNEY OF FANS

Disclaimer: The categorization herein is based on research analysis and is intended for reference only.



* Logos reproduced from VnExpress, Tuoi Tre, Kenh 14, HTV, VTV, Threads, YouTube, Instagram, Facebook, TikTok, Google, Bing, Coc Coc, ZingMP3, Spotify, Nhaccuatui, Apple Music, Anh Trai Say Hi, Chi Dep Dap Gio, Anh Trai Vuot Ngan Chong Gai, 2 Ngay 1 Dem, HOZO, Monsoon, GENfest, Nhung Thanh Pho Mo Mang, HayFest, Hoi Thuan Hoi, Dopamine, Sundays, Sunny, Su, TicketBox, TicketGo, SkyTour.

SUPPORT LEVELS OF FANS



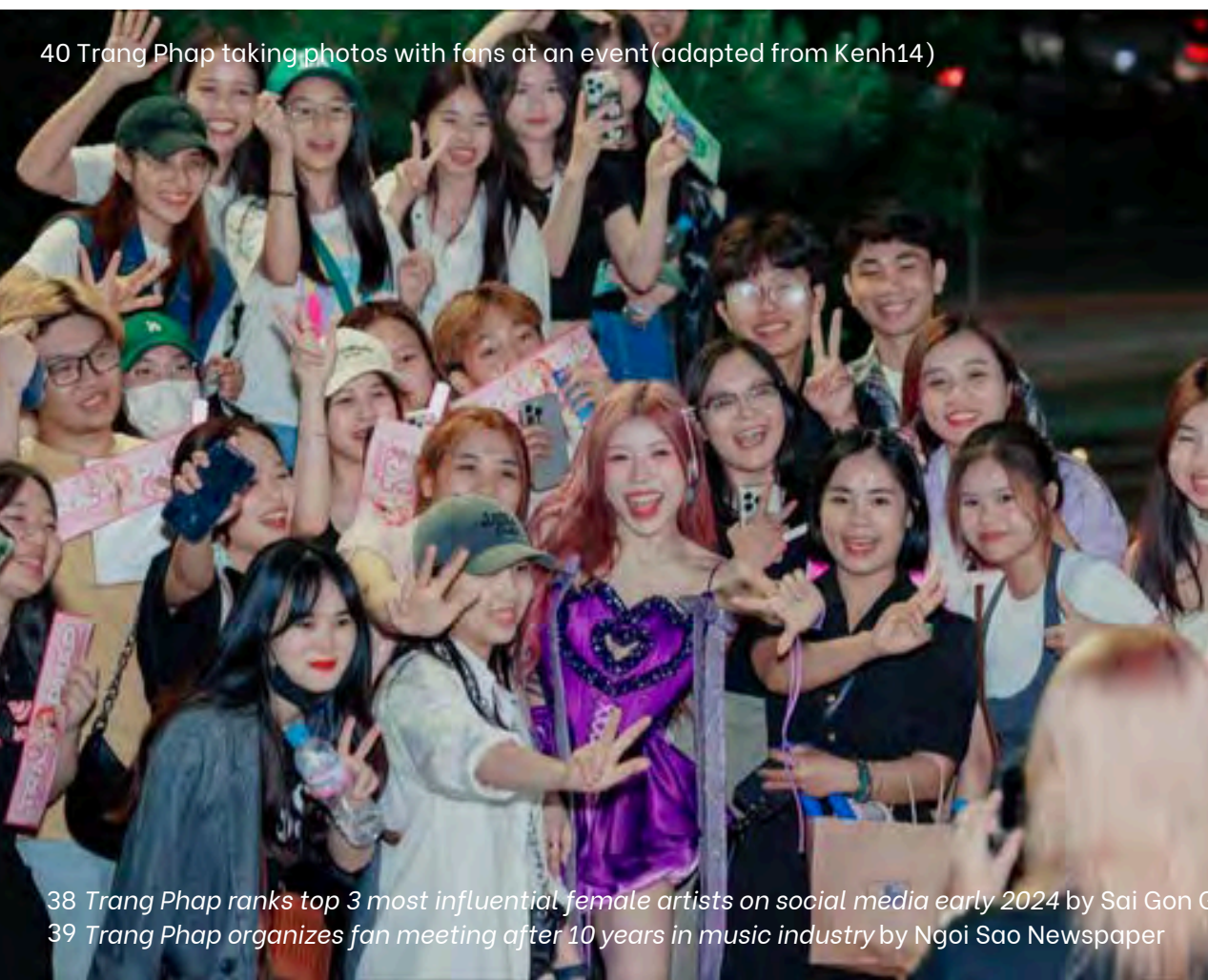
Disclaimer: The categorization herein is based on our research analysis and is intended for reference only.

	Average monthly spending	Characteristics	Behaviors
Non-fan	0 VND	Passive music consumption	Music is consumed through social media platform recommendations. Users are not active listeners and are unlikely to spend on music.
Music Fan	< 50,000 VND	Subscribe to digital music platforms Follow artists and update releases on social media	After discovering favorite songs/artists, users subscribe to listen to their preferred tracks. Subscription costs usually fall below VND 50,000/month.
Casual Fan	50-200,000 VND	Subscribe to digital music platforms Buy Albums/Singles/Physical discs Buy Merchandise (Lightsticks, Apparel, Photobooks, etc.)	Once listening to artists' music remarkably, fans start spending on activities such as music festivals, concerts, and merchandise. These items typically range between VND 50,000-200,000/month.
Superfan	> 500,000 VND	Subscribe to digital music platforms Subscribe to artists' broadcast channels and fanclubs' social media groups Buy Albums/Singles/Physical discs Buy Merchandise (Lightsticks, Apparel, Photobooks, etc.) Buy Co-branded artist products	Fans become highly loyal to artists and support them by purchasing co-branded products and music-related items such as albums/singles. Monthly spending exceeds VND 500,000.

CASE STUDY: TRANG PHAP AND FANDOM-BUILDING JOURNEY



With over 10 years in the music industry, Trang Phap has not only left her mark on music but has also cultivated a strong and influential fan community (fandom) named *FC Kande*. According to Buzzmetrics, Trang Phap consistently ranked among the top 3 most influential female artists on social media during the first 4 months of the year following her performance at *Chi Dep Dap Gio Re Song*.³⁸ During her fan meeting on April 29, 2024 – the largest event of her career – the fandom demonstrated their passionate support through unique activities such as gifting food trucks to her staff and renting LED screens for promotion.³⁹ Remarkably, tickets for the event sold out within minutes, with 150,000 website visits recorded. Beyond music, *FC Kande* actively participates in social initiatives, raising over VND 50 million to support communities affected by the Yagi typhoon. Additionally, they engage in charity projects inspired by Trang Phap’s humanitarian spirit, such as *Nuoi Em*, *One Body Village*, and *Bung No 0 Dong*. **This unwavering support from a well-mannered and socially responsible fandom has not only solidified Trang Phap’s position as a leading artist but also created significant social value, underscoring the power of fan communities in driving an artist’s success.**



40 Trang Phap taking photos with fans at an event (adapted from Kenh14)



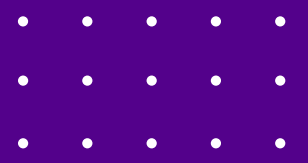
41 Trang Phap at her fan meeting (adapted from Ngoi Sao)



42 Trang Phap signing for her fan at an event (adapted from Sai Gon Giai Phong Newspaper)

³⁸ Trang Phap ranks top 3 most influential female artists on social media early 2024 by Sai Gon Giai Phong Newspaper
³⁹ Trang Phap organizes fan meeting after 10 years in music industry by Ngoi Sao Newspaper

FANS - RECOMMENDATIONS



Given the vital role of fans in the development and promotion of music, artists should prioritize the establishment and cultivation of official fan clubs with engaging activities, rather than allowing fan groups to operate autonomously. Building official fan clubs fosters loyalty, expands the artist's reach, and guides the fan community toward healthy and positive interactions. This proactive approach helps minimize unsanctioned fan activities, reduces the likelihood of negative arguments and extreme views between fan clubs, and protects the artist's image, which indirectly benefits the music market as a whole. The robust development of organized fan clubs also enables brands to develop effective cooperation strategies with artists and their fans, recognizing the diverse purchasing power and product preferences within these communities. For example, brands can target superfans with exclusive events and artist-related merchandise to strengthen their connection with the brand. Furthermore, the government plays a crucial role in fostering a well-mannered fan community. This can be achieved by supporting safe music events, establishing codes of conduct for fans, and cultivating a healthy environment that encourages music lovers to become dedicated fans, thereby contributing to the expansion of the Vietnamese music market.



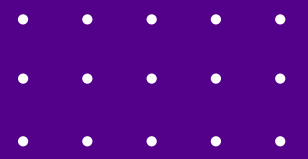
“Fans in Vietnam are now largely influenced by digital platforms. They can listen to a sound clip on TikTok without knowing the singer but still remember the song by heart. Recommendations from friends and suggestions from the platform create a strong word-of-mouth effect, helping the song become known to many people. This requires artists to be more proactive in interacting with fans, from small things like updating their profiles on platforms to reach new listeners, or organizing activities that are more engaging and spread more strongly.”

Mr. Nguyen Huu Anh

Founder & CEO
at The First Management



DIGITAL STREAMING PLATFORMS



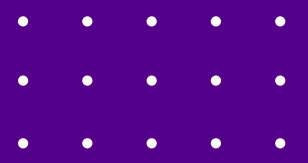
Digital Streaming Platforms (DSPs) play an intermediary role, helping artists and record companies release music, organize music events, distribute music products, and reach target audiences both domestically and internationally. Vietnam's digital music streaming market is projected to reach USD 45.97 million by 2027. The streaming activity in Vietnam is highly dynamic, with prominent local platforms (Zing MP3, NhacCuaTui) and global platforms (Spotify, Apple Music, YouTube).

25.92 million USD

revenue from digital music streaming in Vietnam in 2024⁴³

⁴³ Revenue of Vietnam's digital music streaming market from 2017–2027 by Statista

DIGITAL STREAMING PLATFORMS



AUDIO-BASED

AUDIO- & VIDEO-BASED

Disclaimer: All information is current as of December 2024.

#ListenToShare

- Spotify Premium's playlist sharing feature with friends: listeners can share a single playlist, adding new songs for both to enjoy together.
- 246 million premium users worldwide as of Q2-2024.⁴⁴



#V-PopUniverse

- Platform with the most Vietnamese music.⁴⁵
- Copyright for Vietnamese music increased to 98%.
- 50% increase in listening time per session using the *Music Suggestions* feature.⁴⁵



#SpatialAudio

- Lossless and Hi-res Lossless audio, with support for *Spatial Audio* and *Dolby Atmos*, bringing a true audio-hearing experience.
- *Apple Music Sing* feature: users can sing karaoke with lyrics displayed on the screen and adjust the original vocals to match their own singing style.
- Added 4 million premium subscribers in 2023.⁴⁶



#ComprehensiveExperience (both audio & visual)

- YouTube Music combines high-quality sound and visuals for a complete experience.
- *Hum to Search* feature enables users to hum a tune to identify songs on YouTube.
- YouTube Premium reached 100 million subscribers by 2024.⁴⁷



#AudioTrend

- The platform creates the most challenges and trends, helping songs gain more recognition.
- Vietnam has 69.67 million users, ranking 5th globally in *Countries with the most TikTok users as of April 2024*.⁴⁸



⁴⁴ Q2 Revenue Report 2024 by Spotify

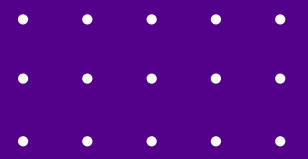
⁴⁵ Vietnam Music Report 2023 by Zing MP3

⁴⁶ Apple Music Usage and Revenue Trends 2024 by Business of Apps

⁴⁷ YouTube Usage and Revenue Trends 2024 by Business of Apps

⁴⁸ Top 5 Countries with Most TikTok Users, April 2024 by VnEconomy

DIGITAL STREAMING PLATFORMS - HIGHLIGHTS



49 Spotify Vietnam's billboard to promote for Mỹ Linh (adapted from Facebook)

Music distribution

Music platforms help distribute music and connect artists to their target audience through playlists, ensuring music is delivered effectively. For example, with Spotify, artists can feature in playlists like *Hot Hits Vietnam* or *Thien Ha Nghe Gi*, helping them increase their visibility through high-quality curated playlists. However, this position is highly competitive and usually settled for popular artists.

Artists & music product promotion

Platforms support artists by showcasing their works on playlist covers, organizing promotional campaigns across digital channels (advertisements, social media posts, etc.), and hosting exclusive events like livestreams or premieres. This helps artists maximize the reach of their releases and create connections with their fans. Domestic platforms like Zing MP3 prioritize Vietnamese artists, creating a step forward by supporting rankings through Zing Chart.

Online fan communities

Platforms assist artists in connecting with their fans through interactive features such as follows, comments, and shares, creating a lively ecosystem that connects artists and fans directly.

Revenue sharing

Platforms share revenue generated from streams and artist music productions, helping them secure a stable income from digital music.

DIGITAL STREAMING PLATFORMS - RECOMMENDATIONS

To better understand audience preferences on today's rapidly evolving digital platforms, management companies and artists should proactively analyze user data. This analysis can help optimize release strategies and cultivate deeper connections with diverse fan groups. Brands can leverage this data to sponsor playlists or music campaigns on digital music platforms that align with their target audience, creating opportunities to expand their reach and build a strong brand image. Furthermore, the government should implement policies that encourage and support the development of digital music platforms. These policies should focus on promoting and increasing the visibility of Vietnamese music playlists and artists to protect and celebrate cultural identity. Simultaneously, they should advocate for the rights of Vietnamese artists within an increasingly competitive global music landscape.



50 Zing MP3's interface (adapted from E-Magazine Người do thi)



“Artists and management companies need to collaborate closely with digital music platforms to build detailed promotional plans and reach users more effectively. Playlists like Zing MP3’s Artist’s Story exemplify platforms that not only serve as distribution channels but also help artists narrate their stories through music. This partnership enhances artists’ visibility to the public, boosting their success in release campaigns.”

Ms. Ton Nu Nhu Ngoc
Head of Labels & Artist Solutions
at Believe Vietnam



ORGANIZATIONS FOR MUSIC OPERATION



The government and specialized organizations play a crucial role in shaping legal frameworks and supporting the music industry's development, from intellectual property laws to managing live performances. Artists, service companies, and the music sector need the support of these organizations to address copyright issues, performance regulations, and cultural development policies. Additionally, music-related activities and events need close collaboration between agencies for licensing, enforcement of supportive policies, and public-private partnerships.

GOVERNMENT AGENCIES



BỘ VĂN HÓA THỂ THAO VÀ DU LỊCH

Manages cultural policies and issues permits for music events

Ministry of Culture, Sports and Tourism (MOCST)



Issues performance licenses and oversees artistic activities

Department of Performing Arts



VIETNAM COPYRIGHT

Protects copyrights and resolves disputes related to music copyrights

Copyright Office of Vietnam (COV)



Licenses and monitors local music events

Department of Culture and Sports (provincial)

Disclaimer: All information is current as of December 2024.

NON-GOVERNMENTAL ORGANIZATIONS



Represents global interests in the recording industry, promotes the value of records, protects producer copyrights, and expands the use of commercial music distribution

International Federation of the Phonographic Industry (IFPI)



Protects the rights and interests of domestic recording labels and handles copyright issues

Recording Industry Association of Vietnam (RIAV)



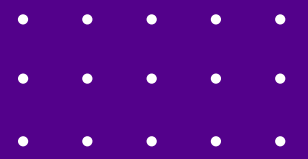
VIETNAM MUSIC INDUSTRY NETWORK

Provides education, networking, and partnership support for developing Vietnam's music industry

Vietnam Music Industry Network (VMIN)

* Logos reproduced from từ Ministry of Culture, Sports and Tourism, Department of Performing Arts, Copyright Office of Vietnam, Department of Culture and Sports (province), International Federation of the Phonographic Industry (IFPI), Recording Industry Association of Vietnam, Vietnam Music Industry Network (VMIN).

ORGANIZATIONS FOR MUSIC OPERATION - HIGHLIGHTS



51 Experts' Discussion at Department of Culture and Sports (adapted from VMIN)



52 National Music Festival 2024 (adapted from Ninh Binh Newspaper)



53 Vietnam Music Week (adapted from VMIN)

Copyright management and protection of recording value

Organizations such as the Copyright Office of Vietnam carry out the licensing and protection of intellectual property rights, ensuring the copyright of artists and related parties in the music industry. Meanwhile, IFPI implements strategies to develop and uphold copyright regulations, resolve copyright disputes, and ensure the music industry operates transparently and legally.

Support for music industry development

The government and VMIN activities provide support programs for artists through cultural and artistic events, meetings and exchanges between parties in the industry, as well as with international market, thereby promoting the development of artists and the domestic music industry. IFPI collects and publishes data on music sales and listening habits, supporting music companies to understand the needs and trends of Vietnamese listeners.

Performance licensing and content oversight

Agencies such as the Ministry of Culture, Sports, and Tourism regulate performance licensing and music activities to ensure compliance with legal regulations and cultural values. IFPI promotes awareness about legal music usage in business, helping the public better understand the economic value of music.

Promote international cooperation

The government fosters favorable conditions for artists to participate in cultural exchange events and festivals with other countries, such as *The Japan Vietnam Festival*, enhancing Vietnam's global music presence.

Manage the impact of AI in music

IFPI advocates for policies and regulations regarding the development and application of AI in music, ensuring both the dissemination and advancement of the technology, while safeguarding the labor and creative efforts of artists and music producers in a fair and appropriate manner.

ORGANIZATIONS FOR MUSIC OPERATION - RECOMMENDATIONS

Management authorities need to enhance the legal framework concerning copyright, intellectual property, and public-private partnerships to foster investment in the cultural, musical, and entertainment industries. Policies must safeguard the rights of all parties, resolve policy conflicts, and ensure the music market operates harmoniously, contributing to Vietnam's cultural and creative industries. Establishing a network that connects companies, artists, and organizations will facilitate the implementation of cultural development programs and encourage public-private partnership. Furthermore, gathering feedback from stakeholders will help improve regulations, creating a sustainable foundation for the industry. In addition, training programs on financial, legal, and ethical standards should be organized to support artists and management companies in building long-term careers and positively contributing to the community.



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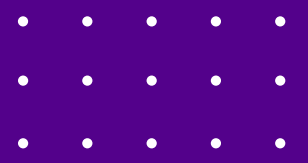
“The Department and the Ministry are always looking for a common voice between the state and the private sector to develop Vietnamese music. The Ministry and UNESCO’s report on culture mention the contributions to music of the Vietnam Music Industry Network (VMIN). VMIN also has a new department - Industry Relations, to contact and exchange with departments, sectors, and embassies of other countries on culture. This shows that both the state and the private sector are always trying to contribute to the development of the current cultural industry.”

Ms. Nghiem Phuong Thao

Founder & CEO
at Vietnam Music Industry Network (VMIN)



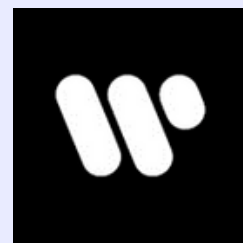
MUSIC LABELS & DISTRIBUTORS



Music service companies and music distributors play an important role in the development and distribution of artists' music. Artists approach these organizations to collaborate on music releases and build promotional strategies. International distributors operate from the upstream stages of production, such as copyright management and publishing, while local distributors act as a bridge between artists and digital music platforms.

Disclaimer: All information is current as of December 2024.

GLOBAL



A branch of Warner Music Group, supporting production, management and promotion of artists like Vu., Madihu, Chillies

Warner Music Vietnam



Belong to Universal Music Group, world's leading music corporation, with global artists (Taylor Swift, Billie Eilish,...) and Vietnamese artists (Wren Evans, tlinh,...)

Universal Music Vietnam



Manage the careers of Vietnamese artists such as Ha Le, Hooligan, Kim Kunny, supporting copyrights and global promotions

Sony Music Entertainment (SME)

LOCAL



For Gen Z artists, specializing in producing and promoting music on digital platforms

MMusic



Focus on production and distribution partnerships, collaborating with local media channels

VIVI Music VN



Offer music publishing solutions for artists such as Miu Le and GERDNANG

MixUs

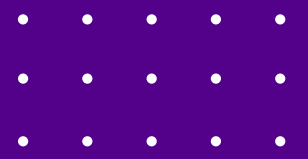


A music distribution network, supporting artists in increasing presence on local platforms like Zing MP3

POPS

* Logo reproduced from Warner Music Vietnam, Universal Music Vietnam, Sony Music Entertainment, MMusic, VIVI Music VN, MixUs, POPS.

MUSIC LABELS & DISTRIBUTORS - HIGHLIGHTS



Global distribution and release

Major global recording labels support artists in releasing music on international platforms such as Spotify and Apple Music, helping them expand their reach outside the Vietnamese market.

Local and regional distribution

Local distributors help artists bring their music to platforms like ZingMP3 and Nhaccuatui, enabling direct access to audiences within Vietnam and the Southeast Asian region.

Strategic planning and development consulting

Global distributors provide consulting services and strategic planning to help artists optimize their profiles on music platforms, aiming to increase views and interactions. Meanwhile, local distributors focus on developing strategic plans tailored to the tastes of Vietnamese audiences.

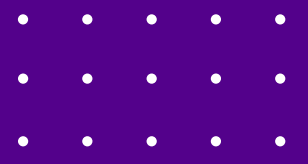
Investment and advertising

Major global record labels invest financially in artists, supporting them in building images and marketing strategies both locally and globally. Local distributors prioritize developing advertising strategies that align with the domestic market without over-relying on investments from large firms.

Copyright and benefit management

Major record labels ensure the protection of artists' copyrights and access to legitimate revenue sources. For local distributors, collaborations with companies and legal partnerships at the local level ensure that copyright is protected within the domestic market.

MUSIC LABELS & DISTRIBUTORS - RECOMMENDATIONS



For artists, working closely with record labels, both domestic and international, to develop effective release plans will help maximize reach and revenue. In addition, when working with professional distributors, artists can build profiles and protect their copyrights more effectively, thereby attracting more fans and partners. Meanwhile, brands can cooperate in promotional projects through artists and the music distribution networks of major record labels, thereby strengthening marketing campaigns. However, to create opportunities for Vietnamese artists to access a larger market without having to depend on foreign companies, the government needs to actively support domestic distribution companies. At the same time, regulations protecting the cooperative rights between artists and distributors need to be established and monitored closely, ensuring transparency in contracts and revenue sharing.



“International record labels play a bridging role not only in bringing Vietnamese artists’ music to international platforms, but also in supporting artists in promotional campaigns, building their image, and shaping their musical style to suit the international market. The participation of major labels is not simply about distributing music, but also contributing to raising the position of Vietnamese artists on the world music map. This investment from international record labels allows Vietnamese artists to reach millions of listeners, increasing their ability to develop both in terms of revenue and branding.”

Mr. Tran Thang Long

Head of Domestic Artists & Repertoire and Marketing
at Universal Music Vietnam



MUSIC MANAGEMENT, MARKETING, & PRODUCTION SERVICES

Marketing agencies and service platforms play a crucial role as intermediaries connecting artists with audiences, assisting artists in building their image, promoting music products, and reaching fans. To succeed, artists often need these agencies to design promotional plans and manage relationships with commercial partners. Meanwhile, these units proactively engage with artists to provide specialized solutions or comprehensive services (360-degree service), ranging from development orientation, creative content production, publishing management to public advertising campaigns.

* Logo reproduced from ST.319 Entertainment, C Mazor Entertainment, The First Management Entertainment, 6th Sense Entertainment, METUB, Double U, Brandbeats, The Talent, S-Hube, OnlyC Production, 1989s, BPRO, Believe Vietnam, The Orchads, Merlin, VIEENT.

Disclaimer: All information is current as of December 2024.

TALENT MANAGEMENT



ST.319 Entertainment



C Mazor



The First Management



6th Sense Entertainment

ARTIST AGENCY



METUB



Double U



Brandbeats



The Talent

PRODUCTION HOUSE



S-Hube



OnlyC Production



1989s



BPRO

DIGITAL MUSIC DISTRIBUTOR



Believe Vietnam



The Orchads



Merlin



VIEENT

MUSIC MANAGEMENT, MARKETING, & PRODUCTION SERVICES - HIGHLIGHTS



55 C Mazor Entertainment (adapted from C Mazor)



56 S-HUBE Production (adapted from Sai Gon Giai Phong Newspaper)

Development of branding strategies and marketing

Management companies support artists in building their personal brands and developing comprehensive communication strategies, ensuring the artists' visibility on both domestic and international media platforms.

Content management and multi-media promotion

Management companies and agencies provide network services and music marketing by promoting artists' products on platforms such as YouTube and TikTok. They also offer consulting on content and advertising strategies that align with target audience segments, maximizing engagement through direct interactions.

Music production

Producers offer services in music production, directing artists toward creating music products that align with market trends and cater to listeners' preferences.

Digital music distribution

Distributors like Believe Vietnam assist independent artists and domestic labels in releasing music on global platforms such as Spotify and Apple Music.

MUSIC MANAGEMENT, MARKETING, & PRODUCTION SERVICES - RECOMMENDATIONS

Artists and management companies need to identify the services that need support, from full contracts to managing specific areas such as media or sponsorship to suit their development needs. In addition, artists also need to professionalize in closely coordinating with production, distribution, and B2B marketing units to make the process of creating music, releasing, and shaping sponsorship and advertising strategies more effective. This is also an opportunity for brands to contact producers to seek sponsorship opportunities for exclusive music production projects, thereby effectively promoting products/services, and better connecting with current/potential customers. Management agencies play an important role in encouraging and organizing industry exchange events such as VMIN (Vietnam Music Industry Network), creating opportunities for music operations, management, and services to meet, learn, and support the development of artists and the operation of the Vietnamese music industry.



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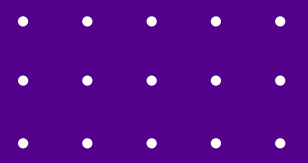
“The current young generation has the seeds of their own musical personalities, but still needs support from management units to develop further. Professional management companies will work and promote on behalf of artists with clients, publishers, copyright protection centers, marketing, press, etc. while artists will focus on honing their professional skills and creativity. Depending on each individual’s goals, the path of musical development can have more or less influence from the management company.”

Mr. Hien Bui

Founder & CEO
at C Mazor Entertainment



DIGITAL MUSIC AMPLIFIERS: SOCIAL MEDIA



Social media has become a crucial channel for spreading and promoting music products. Artists and their management teams actively engage with major social media platforms to interact with listeners, leveraging the power of user-generated content (UGC). These platforms play a significant role in shaping how listeners access and interact with music.

50%

social media campaigns featuring UGC help increase engagement levels⁵⁷

1.3X

Users feel that **TikTok** allows them to co-create content and support each other (compared to traditional media)⁵⁸

#9

Vietnam's ranking in the *list of countries with the most YouTube users as of 7/2024*⁵⁹

#7

Vietnam's ranking in the *list of countries with the most Facebook users as of 4/2024*⁶⁰

550,000

Instagram user growth in Vietnam 2024⁶¹

⁵⁷ 51 Key UGC Metrics for 2024 by Flocker

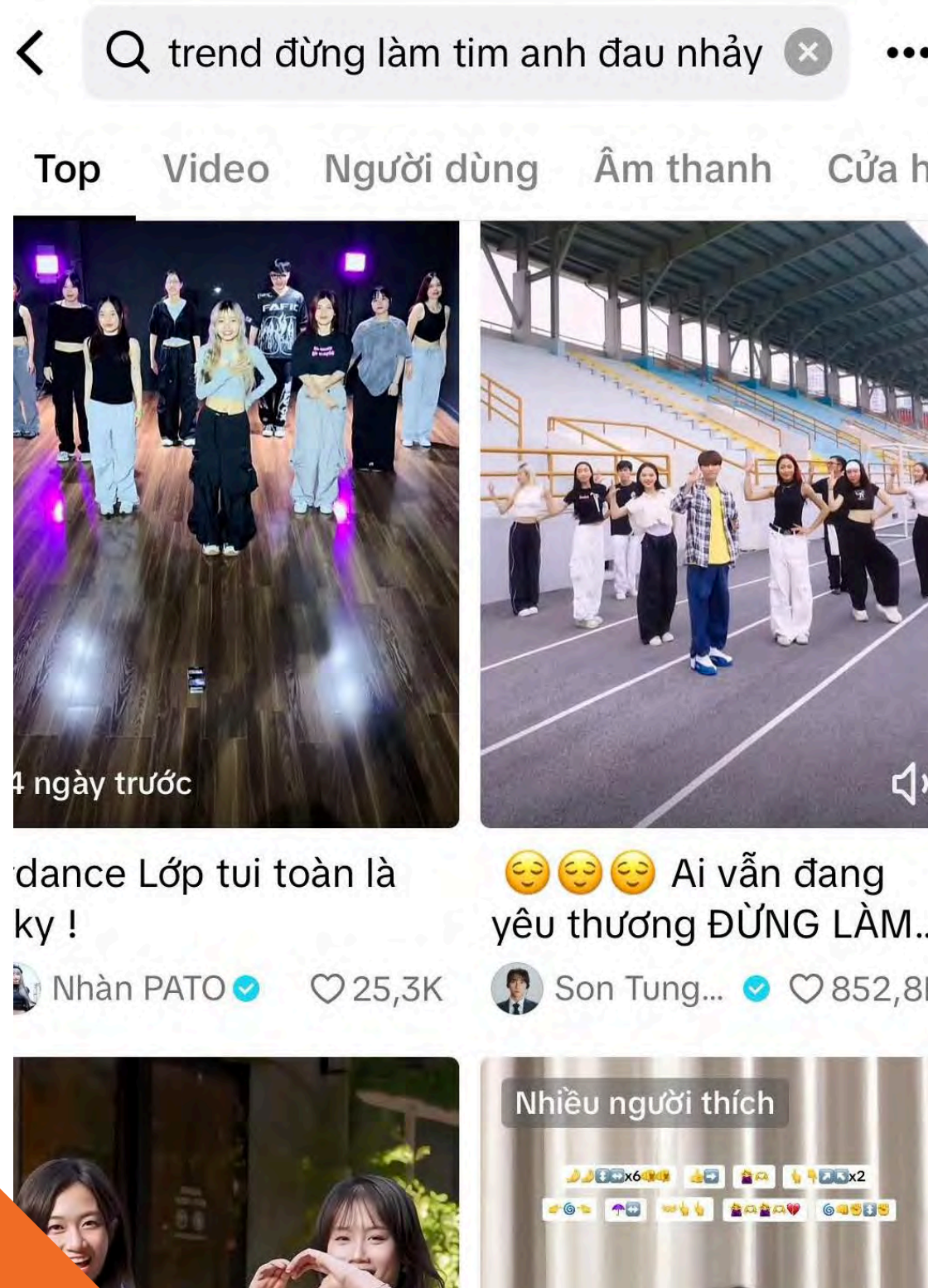
⁵⁸ What's Next: Gen Z Trends by Spotify

⁵⁹ Top Countries by YouTube Audience Size as of July 2024 by Statista

⁶⁰ Top countries based on Facebook audience size as of April 2024 by Statista

⁶¹ Digital 2024: Vietnam (Instagram users in Vietnam in 2024) by We Are Social

DIGITAL MUSIC AMPLIFIERS: SOCIAL MEDIA - HIGHLIGHTS



62 Trend ' Dung Lam Trai Tim Anh Dau' (adapted from Muc Tim Newspaper)

Encourage users to create UGC with sound

Provide music clips and video templates of artists on social media platforms for users to easily create UGC such as dance challenges, trending videos, etc., thereby spreading music products.

Encourage interaction through live content

Support livestream and communication through broadcast channels and chat groups, helping artists interact directly with fans when releasing music products, and creating strong call-to-action messages to fans.

Support enhanced recognition

Provide tools such as blue checkmarks to verify accounts or statements, and official music content to help artists increase credibility and reach users better.

Manage and optimize official sound

Manage artists' official sounds to prevent muting or copyright infringement, and only allow users to use them within the permitted scope.

DIGITAL MUSIC AMPLIFIERS: SOCIAL MEDIA - RECOMMENDATIONS

For artists and management companies, constantly building a strong social media campaign suitable for each platform is a leading strategy that determines success, such as building a separate channel to interact with fans (broadcast channel), having representatives in music groups, creating 360-degree content about new music products, behind the scenes, and suitable content types. In addition, organizing regular activities, livestreams, or fun competitions in groups for fans helps increase interaction and expand coverage for artists. Music activities created by artists and fans on social networks are also opportunities for brands to utilize sponsorship campaigns and cooperate in developing content with artists, thereby increasing brand presence, such as challenge videos or livestreaming product launch events. In order to promote the sustainable and transparent development of music on social networks, in addition to creating favorable development policies, management agencies need to pay attention to monitoring the activities of fans - anti-fans who attack individuals, pry into private lives, share unverified personal information, distort, and seriously violate the personal image of artists. This subsequently creates a fair, civilized music environment, developing in harmony with the Vietnamese economy and culture.



“Social media like TikTok has become a powerful tool for artists to promote their music. Going viral through dance challenges or creative videos from users not only helps increase recognition but also increases the number of searches for the song on other platforms. Artists not only need to release songs but also need to continue to invest in creating creative content, interacting with the community through challenges and activities such as livestreams or fan meetings to retain fans and develop their name.”

Mr. Nguyen Huu Anh

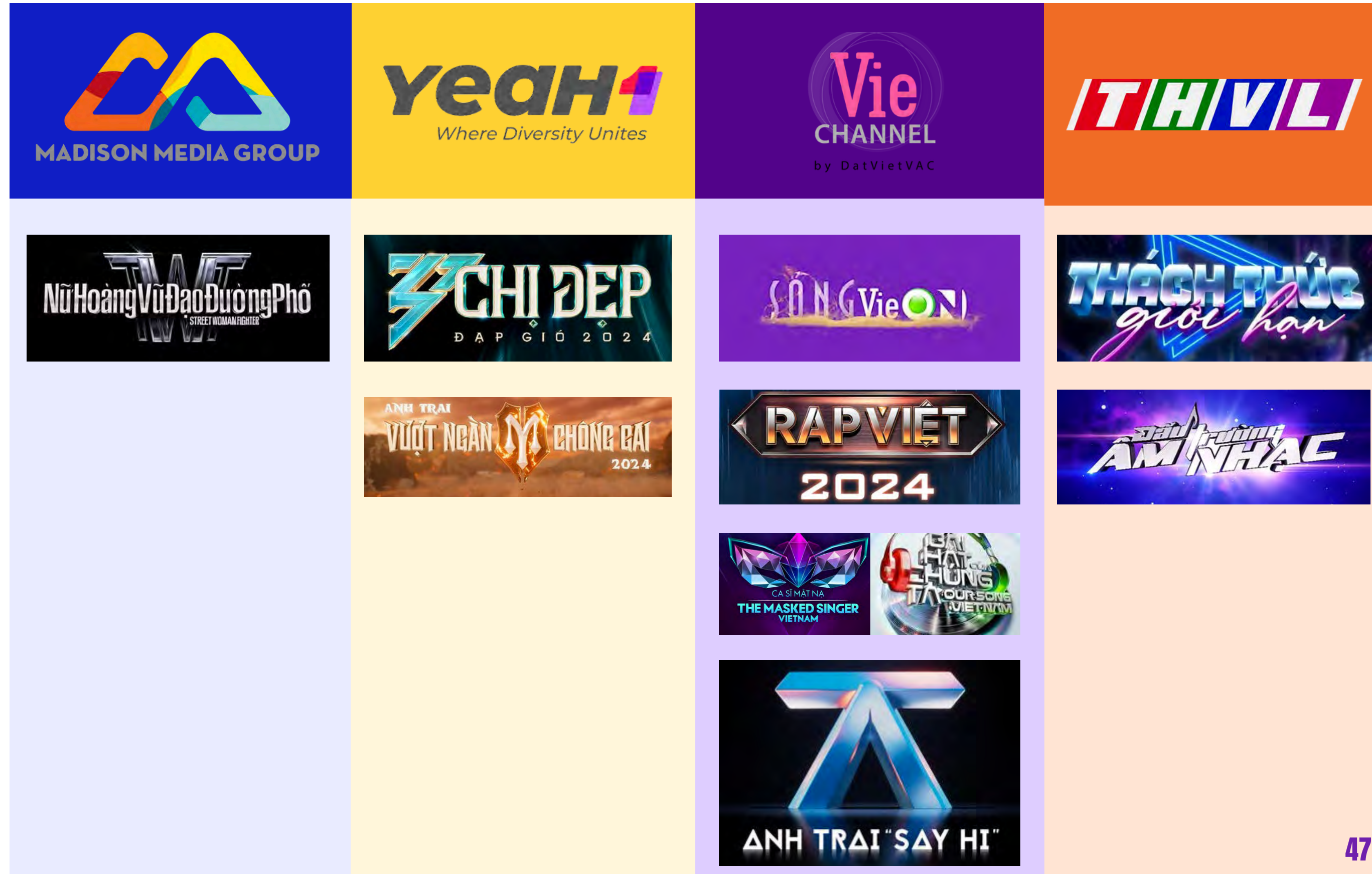
Founder & CEO
at The First Management



DIGITAL MUSIC AMPLIFIERS: ENTERTAINMENT & TV SHOWS

Music entertainment and reality TV shows are important tactics for artists to reach and conquer mass audiences. Artists, especially young ones, often participate in these shows to increase recognition and build a loyal fan base. Production companies collaborate with artists and brands to create engaging entertainment content, through which artists have the opportunity to showcase their talents and personalities.

Disclaimer: All information is current as of December 2024.



ENTERTAINMENT & TV SHOWS - HIGHLIGHTS



Create chances to promote

Entertainment shows like *Rap Viet* invite artists to perform or become judges, helping them reach a wide range of audiences and build their personal image.

Engage with fans

Programs that help artists connect with fans through direct interactive activities, such as voting or organizing fan meetings.

Create entertaining content

Entertainment shows are not only an artistic playground, but also create side content such as interviews, behind-the-scenes, and challenges, helping artists reach more audiences on other platforms like TikTok and YouTube.

Promote popularity rapidly

Influential entertainment shows help emerging artists quickly gain attention and make a name for themselves.

178,770

discussions

after the first episode of *Rap Viet* aired, ranked **#2** on the *SocialTrend Ranking Music Chart*⁶³

6.87 million

engagements

42,140

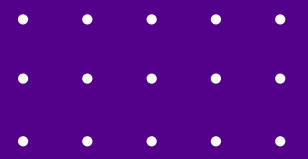
discussions

after announcing the artist line-up of *Chi Dep Dap Gio Re Song 2024 Season 2*, ranked **#4** on the *SocialTrend Ranking Music Chart*⁶³

502,600

engagements

ENTERTAINMENT & TV SHOWS - RECOMMENDATIONS



The influence of entertainment programs creates opportunities for artists, especially new artists, to express their personal style and talent through many angles, from television to social networks, helping them reach a wide audience and increase recognition, thereby diversifying their activities and different musical tastes. This is also an effective touch point for brands to reach suitable target customer files through sponsoring these programs. Not only appearing with the program, but brands can also take advantage of the appeal of famous artists in the program and open up new partnership opportunities to promote brand image and attract attention from the fan community. For the entertainment and music market to develop further, the government should support the management, licensing, and sponsorship of music entertainment programs to encourage artists to participate and develop their careers. This not only leverages the music industry but also creates opportunities for audiences to experience quality content. However, it is also necessary to pay attention to the code of conduct, content, and form of expression that must be appropriate for mass media.



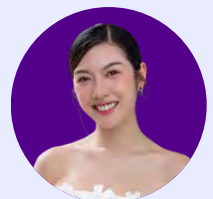
64 'Chi Dep Dap Gio Re Song' TV show 2023 (adapted from Giao Thong Newspaper)



“Participating in entertainment shows helps artists affirm their talents, expand their audience and attract loyal fans. These programs easily create viral moments for artists on social networks, helping them maintain their popularity and possibly become stars in the entertainment industry.”

Ms. Pham Hong Thuy Van

Artist - Founder & CEO
at SHeGAN



DIGITAL MUSIC AMPLIFIERS: MUSIC EVENTS



Music events in Vietnam are an important channel for artists to approach more audiences. Artists participate in these events not only to perform but also to expand their influence, increase their followers, and connect deeply with fans. The programs are usually categorized into 4 groups:



65 'Nhưng Thanh Pho Mo Mang' music festival (adapted from Ngoi Sao)

Artist's personal liveshows

Individual events of each artist (My Tam - *Tri Am*, Ha Anh Tuan - *Sketch A Rose*, etc.)

Festivals with multiple artists

Large music events with many artists, targeting young audiences (*Nhung Thanh Pho Mo Mang*, *GENfest*, etc.)

State-sponsored cultural exchange events

The event aims to promote cultural exchange, and performances within the framework of national cultural holidays (*HoZo International Music Festival*, *Ho Chi Minh City River Festival*, etc.)

Events with international artists

Festivals or liveshows featuring international artists (*8Wonder Winter Festival* with the participation of *Imagine Dragons*)

Disclaimer: All information is current as of December 2024.

66 Generated from Vietnam's e-newspapers 2024

50+ music festivals/concerts in Vietnam 2024⁶⁶

DIGITAL MUSIC AMPLIFIERS: MUSIC EVENTS - HIGHLIGHTS



Book directly through agencies

Organizers contact artist managers or agencies to invite them to perform at festivals or concerts, ensuring the participation of famous artists and creating great attraction for the event.

Share ticket revenue

For indie or emerging artists, promoters can negotiate a revenue split from tickets instead of a fixed fee, reducing financial risk for both parties.

Promotion and media coordination

Organizers use social media and digital channels to promote the event with artists, from livestreams to teaser videos on YouTube or Facebook, to attract audiences.

Create special events for artists

For major artists or self-organized shows, the organizer flexibly meets specific requirements for space, stage, and experience to ensure performance quality.

DIGITAL MUSIC AMPLIFIERS: MUSIC EVENTS - RECOMMENDATIONS

To maximize the value of image and style, both artists and management companies must evaluate the suitability of each event before participating. In addition, participating in major festivals or cultural exchange events not only helps increase coverage but also demonstrates social and community responsibility in promoting Vietnamese music and culture. For brands, sponsoring or co-organizing music events of different scales helps reach target customers more effectively. In addition to media appearances, brands can organize direct activities at events such as giving out samples, playing games, and creating a connection between the brand and the music experience, thereby increasing the number of customers. The role of the state remains highly important in developing public-private partnerships in culture, acting as a bridge between stakeholders to organize and promote music festivals and cultural exchanges domestically and internationally, helping artists develop their reputation and elevate Vietnamese music in the international scape. In addition, the state needs to pay attention to improving event infrastructure and planning to build and restructure stadiums, theaters, and increasingly modern public facilities and services, which are essential macro strategies to serve the experience of organizing music events for artists and the experience of going to concerts for audiences, contributing to the enrichment of Vietnamese music.



68 Ho Chi Minh City River Festival (adapted from Tuổi Trẻ Newspaper)

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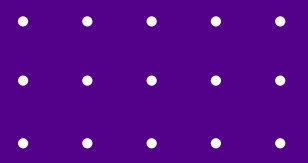
“International festivals help indie artists reach out to a global audience. While language barriers can be a challenge, overseas events have helped them attract new listeners and followers every month. This proves that indie artists can thrive through international music events, build a global fan base and establish a foothold in the music scene.”

Mr. Nguyen Thanh Nhat Minh

Guitarist at FBand & Studio Owner
at M'Acoustic Studio



ACCOMPANYING MUSIC: BRANDS



71 Tea+ collaborated with Wren Evans (adapted from Advertising Vietnam)



72 HIEUTHUHAI & Phuong Ly collaborated with CloseUp (adapted from Advertising Vietnam)

Artists and brands proactively approach each other to utilize common values. Brands often seek out artists to leverage their image, music, and influence to promote communication campaigns or products. Conversely, artists also proactively approach brands to seek opportunities for collaboration and sponsorship of music projects, music videos, or concerts, helping them have more funding for music production and increase their reach.

Disclaimer: All information is current as of December 2024.

60%

audiences remember brands when there is both images and sound ⁶⁹

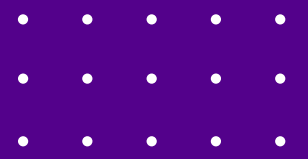
49%

gen Z says brands that sponsor live events and concerts make them more likely to use that brand in the future ⁷⁰

⁶⁹ When music becomes a “weapon” in a brand’s marketing strategy by VTV Online

⁷⁰ Culture Next 2024: Gen Z Trends by Spotify

ACCOMPANYING MUSIC: BRANDS - HIGHLIGHTS



Sponsor/organize music projects (MV, albums, artist tours, music events - festivals, & music entertainment programs)

Full or partial sponsorship of music projects with brand display in artists' music products, or in music events and programs, helps increase recognition and connection with the community.



Brand ambassador and communication cooperation

Allow artists to become the face of the brand, playing a role in promoting product images in long-term campaigns, through posts, livestreams on social networks, and participating in live brand events (customer appreciation concerts, new product launches, etc.).

Branded products (Merchandise)

Brands collaborate with artists to launch special co-branded products, which help engage fans and increase artist recognition and exposure, while boosting brand sales.

ACCOMPANYING MUSIC: BRANDS - RECOMMENDATIONS

One of the urgent strategies for artists in today's highly commercialized music industry is to build relationships and seek opportunities to collaborate with brands that have promotional strategies that are appropriate for music and artists, such as sponsoring MVs, special events, or joint promotional programs. This helps artists increase their recognition, build a strong image, and create a stable source of revenue. On the other hand, brands also need to consider investing in artists and projects with suitable images and styles, creating natural interactions and connections with the brand image. For sponsorship and investment activities to be effective, brands need to limit their deep intervention in artistic creation and music program operations. Moreover, collaborative activities need to be constantly updated with trends to create diverse promotional experiences that are easy for audiences to access. For example, recent effective forms of sponsorship include launching exclusive merchandise with artists, sponsoring artists' own fan meetings, etc. This is also an opportunity for the government to continue promoting public-private partnerships, creating conditions for brands to participate in and sponsor cultural programs and festivals, helping to boost both the music industry and the Vietnamese economy.



75 Pepsi - Thirsty for more Music Festival (adapted from The thao 24/7)

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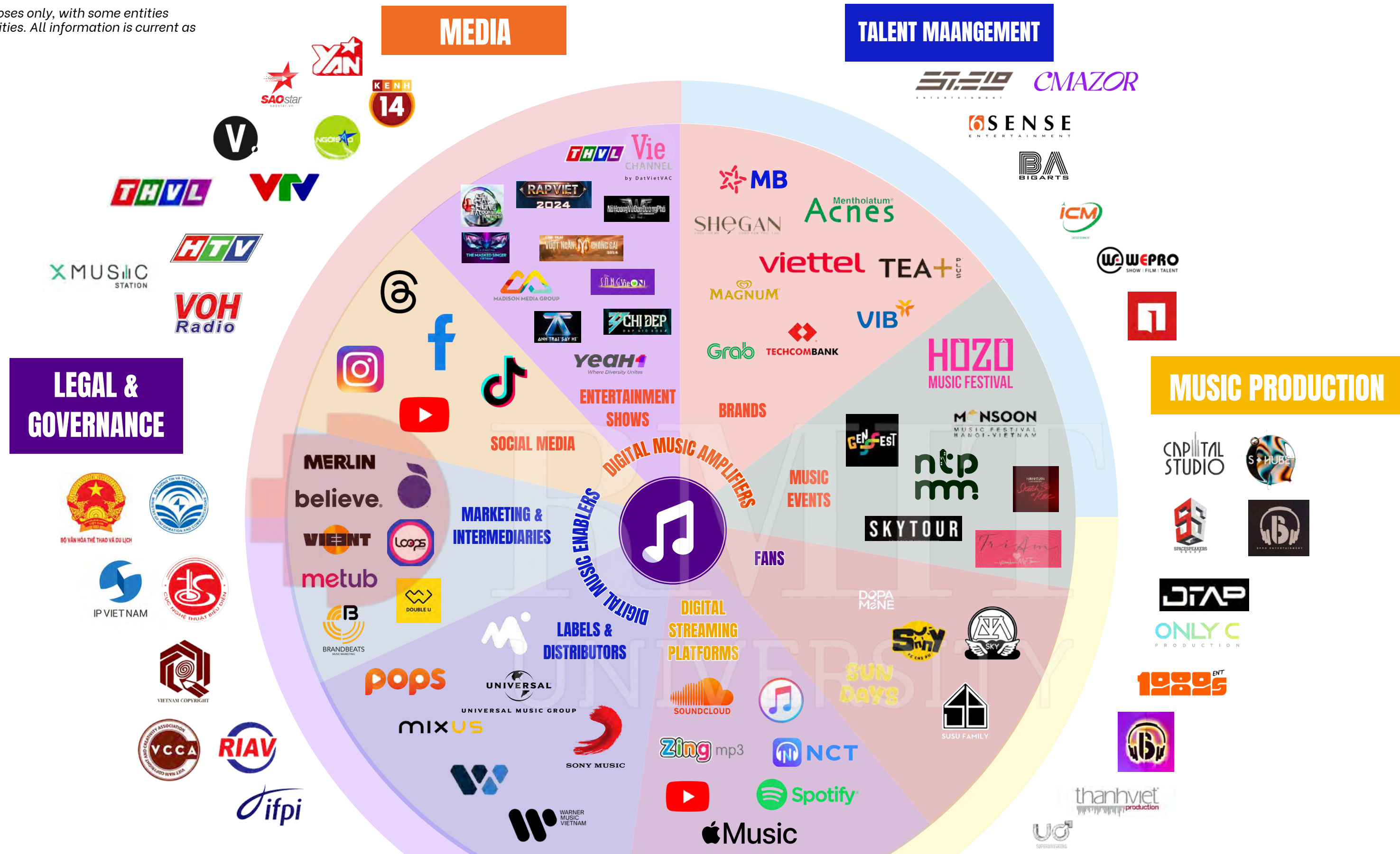
“Nowadays, brands do not just stop at advertising but also invest more heavily in music programs. These programs, despite their fragmented content, are still the most attractive programs to viewers. With creative formats, carefully invested programs not only attract audiences but also help brands make a strong impression. Brands such as VIB and Techcombank have been very successful in investing in music programs, creating a big difference in the eyes of the audience and enhancing brand recognition.”

Mr. Nguyen Tien Huy

Founder & CEO
at Pencil Group

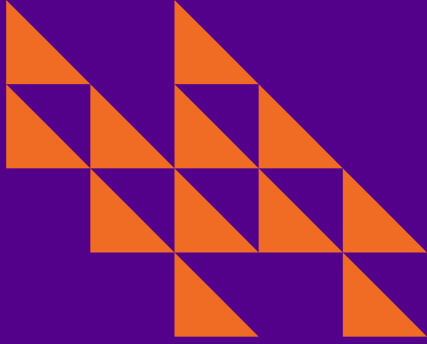


Disclaimer: For reference purposes only, with some entities owning overlapped responsibilities. All information is current as of December 2024.

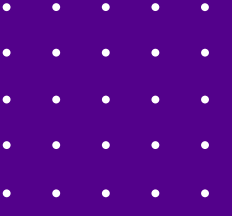


10 EMERGING TRENDS IN VIETNAM'S DIGITAL MUSIC LANDSCAPE 2025

Commerical – Social Potentials



10 EMERGING TRENDS IN VIETNAM'S DIGITAL MUSIC LANDSCAPE 2025



- 1** **Mix and Match: Artist Group Collaboration and Mashup**
- 2** **Increasing Professionalism in Music Management**
- 3** **Growing Attention to Artist Ethical Standards**
- 4** **Role of Music in Cultural Development - Public-Private Partnership**
- 5** **Superfans Become Increasingly Significant**
- 6** **Impact of Artificial Intelligence on Music Composition and Consumption**
- 7** **Rise of Live Music Events**
- 8** **Diversity of Artist Unique Identities**
- 9** **Diversification of Artist Income Streams**
- 10** **Fragmentation in Evaluating Artist Achievements**

1. MIX AND MATCH: ARTIST GROUP COLLABORATION AND MASHUP

The surge of reality TV shows featuring music groups has fostered a trend of collaborative performances. Artists from various generations and entertainment fields are now coming together in highly creative mashup performances.⁷⁶ Mashups blending contemporary V-pop songs with traditional Vietnamese music have resulted in diverse renditions, from modern styles like hip-hop and rap to emotionally rich cultural art performances, revitalizing musical works. This model not only helps artists trend on platforms like YouTube and Spotify but also generates significant social media buzz, providing opportunities for both emerging and established artists to shine together, propelling the music market into a new phase of growth. Despite this, this trend could overshadow solo artists in a market dominated by events featuring multiple artists, reshaping the Vietnamese music landscape to prioritize collaboration over individual performances.⁷⁷

⁷⁶ The explosion of the star-studded music group model by Cong an Nhan dan Newspaper

⁷⁷ Vietnamese music group 'rescued' by ZNews



78 Chi Dep Dap Gio 2024 (adapted from Yeah1)

79 Anh Trai Say Hi (adapted from VieOn)



80 Anh Trai Vuot Ngan Chong Gai (adapted from Yeah1)

81 Chi Dep Dap Gio Re Song-2023 (adapted from Yeah1)

MIX AND MATCH: ARTIST GROUP COLLABORATION AND MASHUP: IMPLICATIONS



The development of music groups brings both opportunities and challenges for the Vietnamese music industry. Programs that feature collaborations among established and emerging artists provide platforms for them to interact with their fans, boosting ticket sales, streaming figures, and social media engagement, which attract significant attention from the media. Brands can leverage the appeal of these programs and participating artists to create strong marketing campaigns, thus enhancing brand value.

To maintain a healthy and non-monopolistic market, managers should consider adjusting strategies to support independent artists, such as facilitating their participation in various music events, enhancing collaborations with established artist groups at exclusive events, and ensuring the harmonious development of artist groups, individual artists within those groups, and other solo artists. This approach ensures the sustainable growth of the Vietnamese music industry by fostering a diverse and balanced artistic landscape. It supports the development of individual artists, both within groups and as solo performers.

“

“The rise of artist groups brings numerous benefits to the development of the entertainment industry. Each group performance garners significant media attention due to the collective power of multiple artists participating. This drives the growth of individual artists and opens up greater opportunities for sponsorships and collaborations. On the other hand, the debut of star groups like LUNAS and MOPIUS poses significant challenges for managers in ensuring artists’ rights and maintaining sustainable operations. Moreover, independent artists may face difficulties in competing and standing out if they do not engage with these group trends.”

Mr. Nguyen Huu Anh

Founder & CEO
at The First Management





CASE STUDY: CHI DEP DAP GIO RE SONG, ANH TRAI VUOT NGAN CHONG GAI, ANH TRAI SAY HI

In 2024, Vietnam's entertainment scene was electrified by two boy group shows, *Anh Trai Vuot Ngan Chong Gai* and *Anh Trai Say Hi*, alongside the lasting buzz from Season 1 and the return of Season 2 of *Chi Dep Dap Gio Re Song*, as well as the upcoming debut of *Em Xinh Say Hi* in 2025. These programs consistently rank among the most discussed topics on social media, thanks to the humorous interactions of numerous famous artists and the diversity of performances they deliver. Season 1 of *Chi Dep Dap Gio Re Song* successfully introduced the group LUNAS, featuring standout members like Ninh Duong Lan Ngoc, Trang Phap, and Huyen Baby. Their debut song *Moonlight* quickly amassed millions of views on YouTube and garnered a robust fanbase. Similarly, *Anh Trai Say Hi* and *Anh Trai Vuot Ngan Chong Gai*, with over 60 talented artists, impressed audiences by producing hits that achieved millions of views and dominated trending digital charts. These shows also saw high viewership and extensive social media discussions. The trend continues with *Em Xinh Say Hi*, set to premiere in 2025, solidifying the strong appeal of reality TV shows featuring music groups, mix-and-match collaborations, and artist mashups in Vietnam.

1 million

number of discussions about the show *Anh Trai Say Hi*, ranked **#1** on the Top 10 *SocialTrend Ranking Music - Entertainment Program* in 9/2024⁸²

253,440

number of discussions about the show *Anh Trai Vuot Ngan Chong Gai*, ranked **#2** on the Top 10 *SocialTrend Ranking Music - Entertainment Program* in 9/2024⁸²



2. INCREASING PROFESSIONALISM IN MUSIC MANAGEMENT

The rapid growth and increasing complexity of the entertainment music industry, combined with the success of singers managed and guided systematically, have led to a surging demand among independent artists for professional music management. Artists are seeking a more structured approach to their careers, encompassing everything from artistic direction to business investment contracts. This also includes scheduling, event planning, digital platform promotion, fandom management, media relations, and more. With this growing complexity, artists must balance creativity with operational responsibilities. As a result, management teams are becoming essential players, helping artists navigate the commercial aspects of their careers while allowing them to focus on their art.⁸⁴ **Establishing professional systems enables artists to expand their reach, develop their careers sustainably, and maintain their artistic vision without missing business opportunities.**

85 The First Management (adapted from Dep Magazines)

84 *Artists need managers* by Van Hoa Newspaper

INCREASING PROFESSIONALISM IN MUSIC MANAGEMENT: IMPLICATIONS

The shift toward professionalism in Vietnam's music market is changing how artists operate and achieve success. Professionalism allows artists to expand their promotional reach, connect with audiences, collaborate with brands more effectively, and build a sustainable career. Artists with a clear management system can focus on their creative work. Meanwhile, public and commercial aspects such as contracts, partnerships, and digital management are optimized. This ensures the comprehensive growth of an artist's career, both artistically and commercially.

For brands, collaborating with artists using a professional model offers several key advantages: smoother cooperation processes, predictable timelines, and measurable outcomes, thus aligning creative branding with marketing goals.

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“Many artists have not focused on optimizing their personal profiles on digital music platforms like Spotify, Apple Music, ... Information is not frequently updated, old images persist, and new songs are not constantly promoted on these platforms, leading to untapped potential and weak connections with fans. To grow, artists need to embrace professionalism even in the smallest tasks, such as updating their images, information, and creative works, which significantly enhance their ability to reach and interact with audiences on these platforms.”

Ms. Ton Nu Nhu Ngoc

Head of Labels & Artist Solutions
at Believe Vietnam





5AM



88 SpaceSpeakers Label at 5AM event (adapted from Instagram)



89 SpaceSpeakers with Pepsi 55 Radar (adapted from SpaceSpeakers)

CASE STUDY: SPACESPEAKERS'S PROFESSIONAL DEVELOPMENT JOURNEY

SpaceSpeakers, founded by Touliver, is a prime example of how professionalism can transform a group of artists into a commercial powerhouse. Established in 2011 by independent artists in the fields of hip-hop and electronic music, SpaceSpeakers has developed into a comprehensive structure, notable for its unique music strategies and brand-building, with prominent artists like Binz, Soobin Hoang Son, and Rhymastic in its lineup. Their development has not only enabled SpaceSpeakers to organize major concerts celebrating their musical journey but also opened up opportunities for collaborations with leading brands. In 2024, SpaceSpeakers actively engaged in key activities such as *Sunrise Music Event 5AM* in Ho Chi Minh City, in partnership with Vietnam Airlines and Vietcetera,⁸⁶ as well as the *Gieo Mam Thien Tam* concert in Hanoi with VinGroup. They also took a mentoring role in the music reality show *Pepsi x 55 RADAR*. Additionally, in May 2024, SpaceSpeakers announced their strategic partnership with Top One Studio, marking an important milestone where artists in the music industry cooperate with a reputed marketing agency in Vietnam.⁸⁷ **The balance between creativity and professionalism strengthens the position of SpaceSpeakers, opening opportunities for collaborations, brand development, and global expansion.**

86 SpaceSpeakers launches music making show, shares tips on how to turn songs into hits by Vietcetera

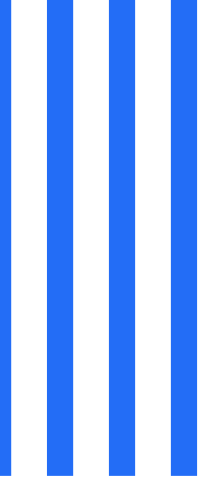
87 Top One Studio signs strategic partnership with SpaceSpeakers Label and Suboi by VTV Online

3. GROWING ATTENTION TO ARTIST ETHICAL STANDARDS

As the music industry grows and artists' fan bases expand, along with increased commercialization, the public and brands have increasingly high expectations for ethical standards and professional behaviors from artists as influential figures in society. The trend of 'responsible music' emphasizes that artists need not only talent but also compliance with the law, respect for copyright, and their audiences' values. They must avoid controversial actions or statements, whether on stage, with colleagues, or in their personal lives. Such behavior not only affects individual artists but also has implications for the healthy development of the industry as a whole⁹⁰. The Ministry of Culture, Sports, and Tourism introduced the *Code of Conduct* in 2021. Since then, they have continued to push for stricter limitations on the appearances of artists who violate regulations in the press and on social media. As a result, some artists have faced penalties and been shunned by brands and public opinion. This has driven artists to place greater emphasis on ethical training and situational handling skills, enabling them to better meet public expectations.



GROWING ATTENTION TO ARTIST ETHICAL STANDARDS: IMPLICATIONS



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“Artists today face intense scrutiny regarding their statements, images, and music. Therefore, to ensure that artists adhere to the cultural and artistic communication standards set by the Ministry of Culture, Sports, and Tourism, and to protect the image of artists in the eyes of the audience, Zing MP3 implements strict policies and thoroughly censors song keywords and content. This ensures compliance with ethical standards, while simultaneously safeguarding the platform’s and artists’ reputations and delivering positive value to the audience.”

Ms. Tran Thi Mai Anh

Business Development Manager
at Zing MP3 & Zing Media





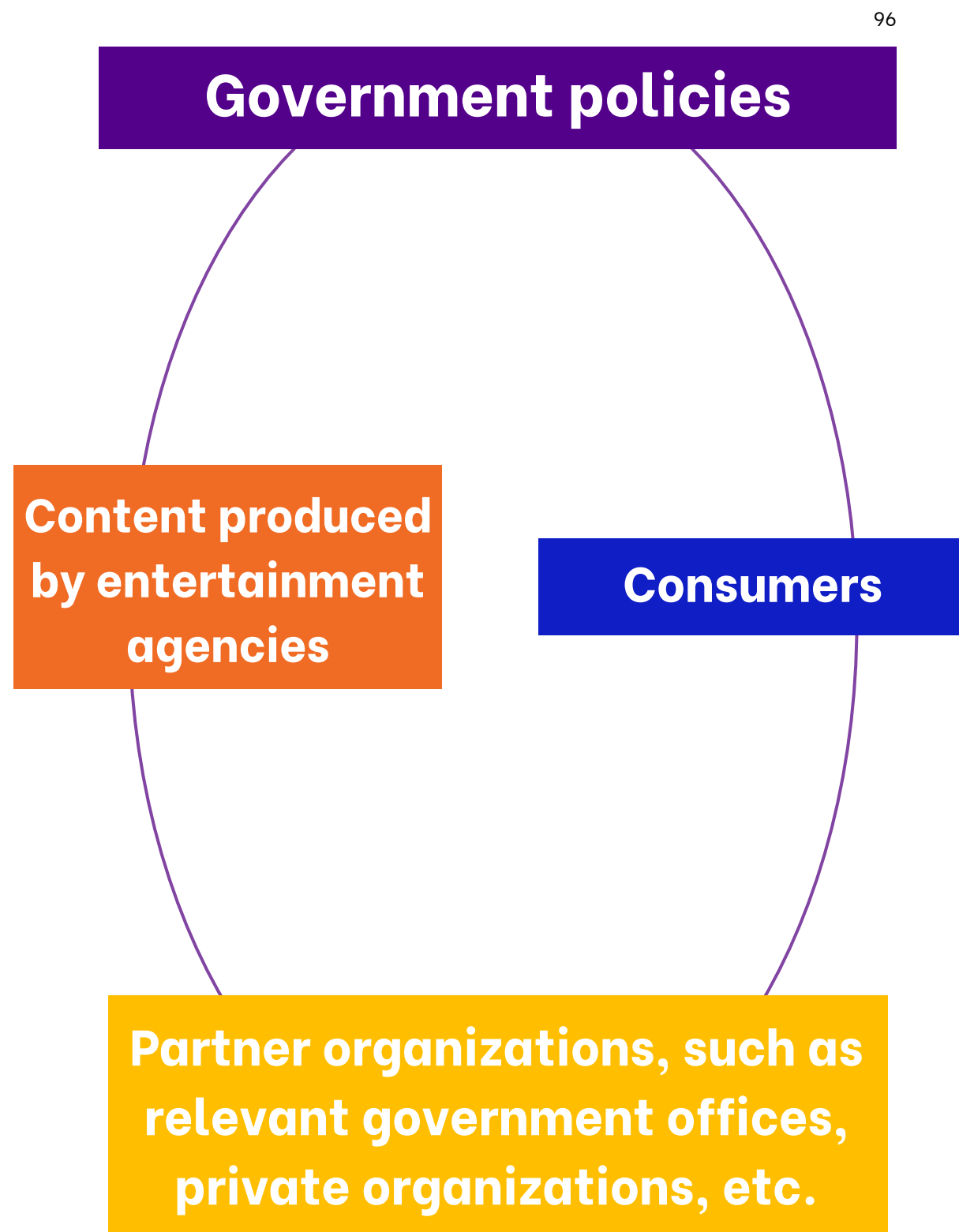
CASE STUDY: GLOBAL ARTIST MANNERS AND LESSONS FOR VIETNAM

Globally, strict measures are applied to regulate artists' conduct, aiming to build positive influence and prevent negative societal impacts. In South Korea, entertainment companies like SM, YG, and JYP implement rigorous 3-to-10-year training programs for trainees, focusing on communication skills, crisis management, and social responsibility. China has also taken strong action, including blacklisting and banning unethical artists.⁹¹ Rosé, a member of BLACKPINK, is a prime example of the effectiveness of a well-structured training system. Born in New Zealand and raised in Australia, Rosé joined YG Entertainment at 15 and underwent a challenging trainee journey. She endured grueling practice schedules and persistent loneliness but overcame with determination and discipline to become a global star. Throughout her career, Rosé has maintained a non-scandal professional image and consistently upheld her responsibilities to the public. Her success with the song *APT.* and her debut solo album highlight her dedication to her craft. In Vietnam, many artists have risen to fame too quickly without proper training, leading to scandals over their conduct that have sparked public outrage.⁹² Artists and management companies in Vietnam should draw lessons from international models to cultivate a positive artist image and avoid negative impacts on the music industry.

⁹¹ *Improving the cultural behavior of artists* by Nhan Dan Newspaper

⁹² *Artists and professionalism in behavior and communication* by Sai Gon Giai Phong Newspaper

4. ROLE OF MUSIC IN CULTURAL DEVELOPMENT - PUBLIC-PRIVATE PARTNERSHIP



In 2024, the public-private partnership model plays an important role in organizing cultural, entertainment, and music events, contributing to the cultural development of Vietnam. According to research, the coordination between government policies, entertainment content production agencies, consumers, and partner organizations has created remarkable success. Events such as the *HoZo International Music Festival* in Ho Chi Minh City and the *Monsoon Music Festival* in Hanoi are prime examples⁹⁴. Government and local support policies provide a solid foundation, while private entertainment companies play a key role in producing high-quality content and organizing professional events to attract both domestic and international audiences. These festivals not only offer opportunities for artists to showcase their talents but also leverage Vietnam's cultural standing on the global stage by attracting international audiences. Moreover, these events stimulate local economies, generating significant demand for lodging, dining, and consumer services during festival seasons⁹⁵. **As such, music has become a strategic tool not only for preserving cultural heritage but also for promoting sustainable economic and social development in Vietnam.**

94 *Music Festivals Promote the Development of Cultural Industries* by Nhan Dan Newspaper

95 *To Have Music Industry Cities* by Dai bieu Nhan Dan E-Newspaper

96 *Korean Government's Policy in Developing K-pop* by Journal of Letters

ROLE OF MUSIC IN CULTURAL DEVELOPMENT - PUBLIC-PRIVATE PARTNERSHIP: IMPLICATIONS

Collaborative cultural and music events in Vietnam not only bring cultural value but also boost the economy by creating favorable conditions for connections among artists, brands, and the public, while attracting a significant number of tourists. These events contribute to the local economy, especially in sectors such as hospitality, dining, and supporting industries like transportation and tour operators.

Furthermore, these initiatives promote the spread of Vietnamese culture to both domestic and international communities, fostering national identity through music and art. This approach contributes to building a vibrant cultural industry, positioning Vietnam as an increasingly attractive destination for hosting cultural and artistic events globally

“

“Public-private partnership cultural and music events are being increasingly promoted, attracting greater attention and more diverse organizations to create platforms for artists to connect with and show appreciation to local audiences. Local festivals also tend to invite artists born in that region to strengthen cultural ties and provide opportunities for artists to expand their influence and contribute to the country’s music and cultural heritage.”

Mr. Nguyen Tien Huy

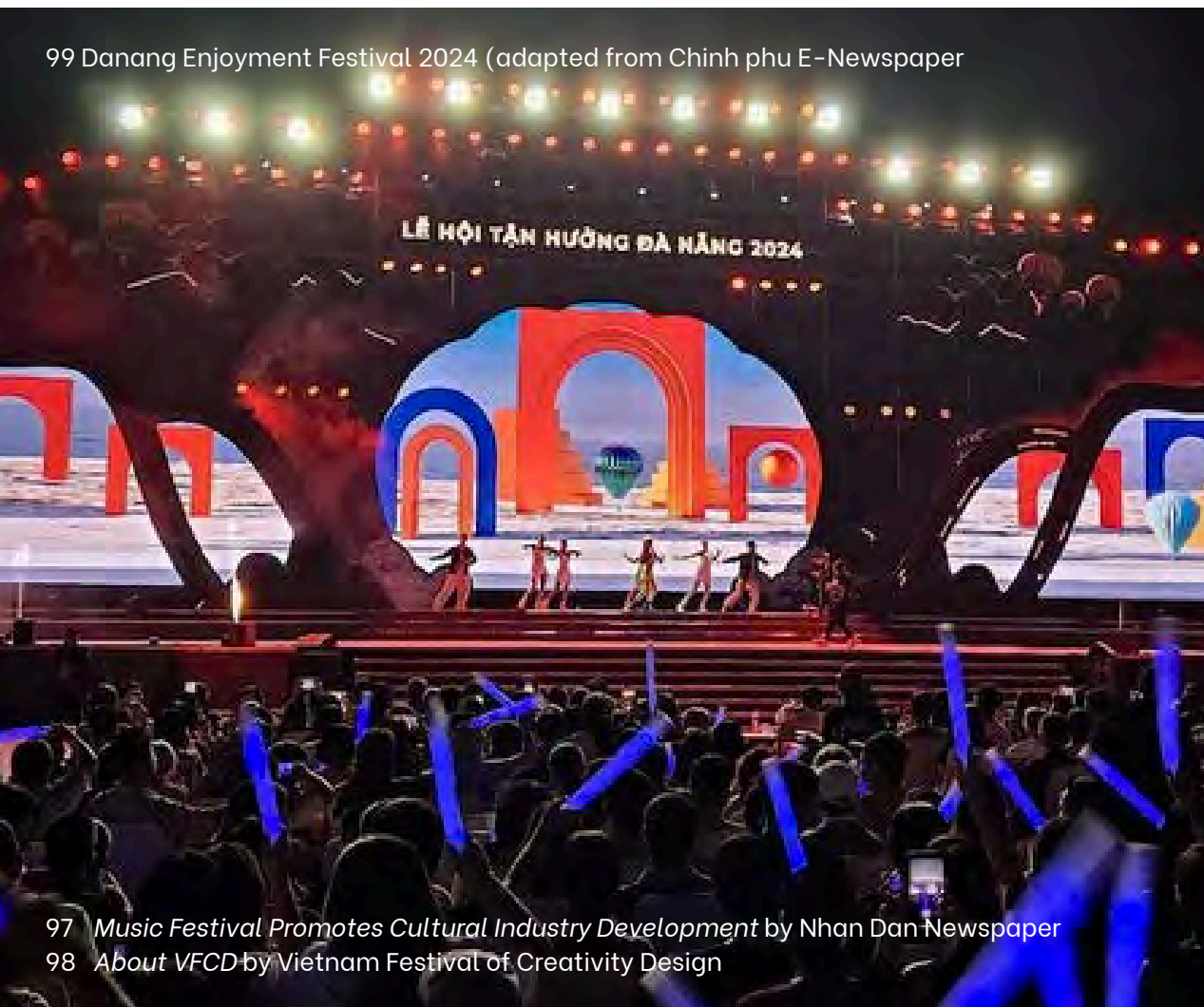
Founder & CEO
at Pencil Group



CASE STUDY: MAJOR PUBLIC-PRIVATE MUSIC EVENTS IN VIETNAM

Over the past year, Vietnam hosted numerous significant music and cultural events, contributing to cultural and economic development. **HoZo International Music Festival** in Ho Chi Minh City attracted over 200,000 attendees, showcasing a wide variety of genres ranging from traditional to EDM. In Hanoi, the **Monsoon Music Festival** drew an audience of 80,000 participants. The second annual **Ho Chi Minh City River Festival 2024** combined water sports, parades, and artistic performances, celebrating the rich culture of rivers and waterways. The **Danang Enjoyment Festival 2024** also captivated visitors with artistic, entertainment, and coastal tourism activities.⁹⁷ In addition to these performance festivals, the 6th **Vietnam Festival of Creativity and Design (VFCD)**, organized by RMIT University Vietnam in collaboration with the Vietnam Institute of Culture and Arts Studies, aimed to support the development strategy for cultural industries under the UNESCO Creative Cities Network. This event reinforced Vietnam's position on the global creative map.⁹⁸

99 Danang Enjoyment Festival 2024 (adapted from Chinh phu E-Newspaper)



101 Ho Chi Minh City River Festival 2024 (adapted to Vietnam.vn)

97 Music Festival Promotes Cultural Industry Development by Nhan Dan Newspaper

98 About VFCD by Vietnam Festival of Creativity Design



5. SUPERFANS BECOME INCREASINGLY SIGNIFICANT

The vibrant activity of passionate fans (superfans) is having a significant impact on Vietnam's music industry. With more than 75% of music consumption still concentrated on domestic products, superfans, especially those from Gen Z, are playing a crucial role in enhancing the popularity of local artists.¹⁰² They are not passive listeners. Instead, they actively promote their idols, purchase concert tickets, and propel artists to the top of platforms like YouTube and Spotify. Inspired by K-pop culture, this model often achieves great success due to strong social media engagement and participation in events. However, superfans also exert significant influence over artists' careers, offering enthusiastic support but potentially turning away if their expectations are not met. **This dynamic creates opportunities for deeper connections with fans while presenting challenges in managing the public image of artists. Artists and their management teams must carefully navigate fan expectations and maintain a positive image to avoid alienating their dedicated fanbase.**

130%

fans are willing to spend over VND 500,000 on music-related products

¹⁰² This day has finally come: Young people love Vietnamese artists, pure Vietnamese concerts "sell out" because of the appeal of domestic idols by CafeF

* Q: What items related to music are you willing to spend money on?

SUPERFANS BECOME INCREASINGLY SIGNIFICANT: IMPLICATIONS

Superfans are the most dedicated and loyal fan group, fostering online interactions through engaging content and discussions to expand the reach of artists and stakeholders. They regularly subscribe to music platforms to increase views and streams on platforms like YouTube and Spotify. Additionally, they purchase tickets for music events, concerts, exclusive merchandise, and participate in exclusive experiences like meet-and-greet sessions, bringing financial benefits to brands and creating new event models for production companies.

Having said that, to avoid negative effects such as obsessive behavior or backlash from unmet expectations, artists and business partners need to understand superfans' psychology to build sustainable relationships aligned with their aspirations. This enables them to effectively leverage superfans' loyalty to enhance commercial value and foster stronger bonds

“

Domestic market accounts for 70% of music consumption in Vietnam, with superfans playing a vital role - especially Gen Z, who are willing to spend money on unique, exclusive events. These fans not only love music but also engage deeply with their idols through social media, helping to enhance public visibility. Overseas music events of Vietnamese artists recently have showcased superfans' willingness to spend on unique event experiences and support for their idols on both domestic and international stages.”

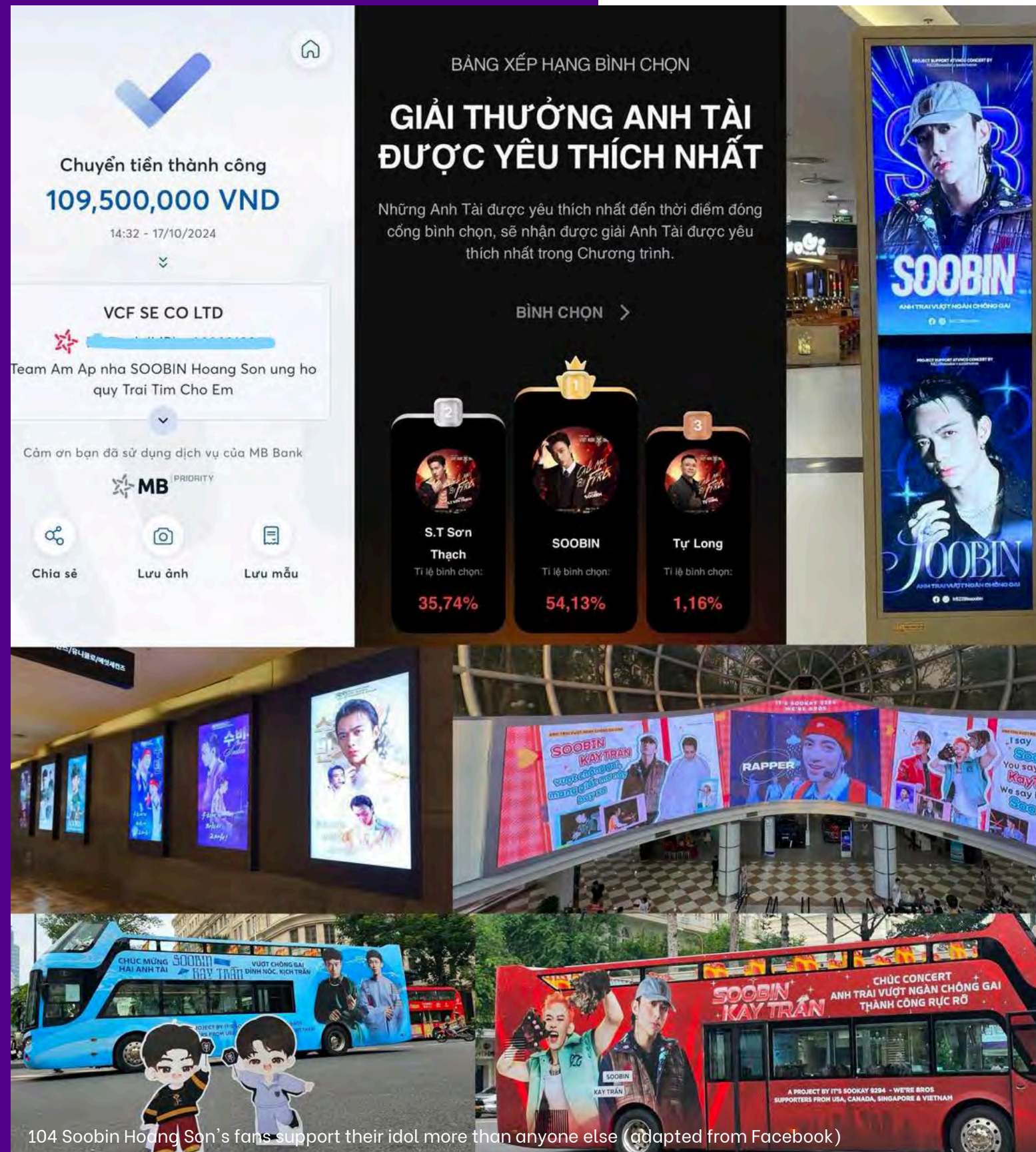
Mr. Hien Bui

Founder & CEO
at C Mazor Entertainment



CASE STUDY: IMPRESSIVE SPENDING

POWER OF SOOBIN HOANG SON'S FANS



104 Soobin Hoang Son's fans support their idol more than anyone else (adapted from Facebook)

103 SOOBIN's superfans donate more than 100 million VND to overcome the consequences of typhoon Yagi by CafeF

Soobin Hoang Son's fans are not only large in quantity but also renowned for their willingness to spend and their wholehearted dedication to their idol. At the concert *Anh Trai Vuot Ngan Chong Gai*, Soobin's fans made a strong impression with large-scale projects: long lines of fans at check-in booths, the appearance of a "prince" Soobin mascot, three double-decker buses promoting Soobin's image roaming the city, and grand LED screens at prominent locations like Vincom Pham Ngoc Thach, Takashimaya, and SkyLED Thu Thiem – the largest LED screen in Southeast Asia. Previously, Soobin's fans also orchestrated a strategic voting campaign and contributed hundreds of millions of VND to secure the *Most Favorite Brother* award. Beyond their support for Soobin's career, these fans also stood out for their philanthropic activities. Before the concert, they donated VND 109 million to a fund for children's heart surgeries and had previously contributed over VND 100 million to help mitigate the aftermath of the Yagi typhoon.¹⁰³

Soobin's fan community demonstrates remarkable social responsibility, spreading positivity and showcasing their intense love and support for their idol.



6. IMPACT OF AI ON MUSIC COMPOSITION AND CONSUMPTION

Artificial Intelligence (AI) is becoming a powerful tool in Vietnam's music industry, effectively supporting the creative and production processes. AI assists music producers by quickly generating sound samples and providing fresh ideas to refine tracks, thereby accelerating production timelines.¹⁰⁵ By efficiently addressing technical challenges, AI allows artists and producers to focus on creativity rather than repetitive tasks. AI is also widely applied in promotion and communication, streamlining video editing, content creation, and social media strategies. **In the future, AI is expected to expand its influence into areas like management and scheduling, providing even greater support for artists.**¹⁰⁶

89%

Vietnamese people know how to use AI¹

¹⁰⁵ *The Impact of Artificial Intelligence (AI) in Transforming Marketing Communications: A Theoretical Review* by Expert Journal of Marketing

¹⁰⁶ *AI and the Future of Entertainment Technology* by HAL Open Science

¹ *Global Music Market Report 2024* by International Federation of the Phonographic Industry (IFPI)

IMPACT OF ARTIFICIAL INTELLIGENCE ON MUSIC COMPOSITION AND CONSUMPTION: IMPLICATIONS

AI is transforming the music industry, particularly in management and operations. AI tools automate processes such as tracking audience interactions, analyzing music consumption data, and streamlining distribution workflows, allowing artists and their teams to focus more on creativity and improving decision-making processes.

AI also holds the potential to facilitate partnerships between musicians and brands, creating personalized user experiences, enhancing engagement, and amplifying brand recognition. Additionally, AI can analyze music data, track interactions, and optimize release strategies. Brands can then create playlists, soundtracks, or custom events to attract audiences.

However, a significant concern is the misuse of AI, such as replicating an artist's voice without consent. This raises the need for stricter intellectual property laws to protect creative rights.

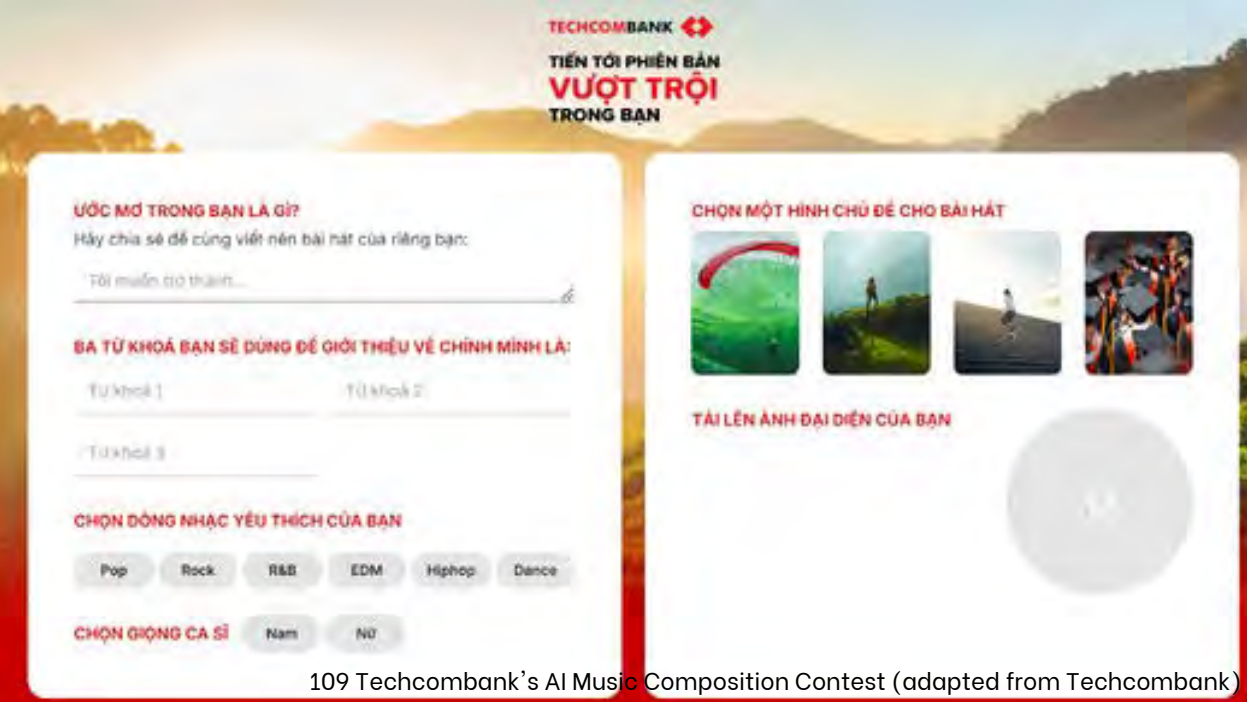
“

“The uncontrolled use of AI, with limited legal restrictions and enforcement mechanisms, can lead to countless unforeseen consequences for the music industry. One prominent example is the use of (1) creative works of others or (2) elements such as images and voices (singing/speaking) of others by AI developers to train AI without obtaining permission or compensating the rights of holders. This is essentially a form of ‘appropriation’ of the investment and creativity of artists as well as music production companies, causing harm and posing a threat to the development of the music industry, which inherently relies heavily on human factors.”

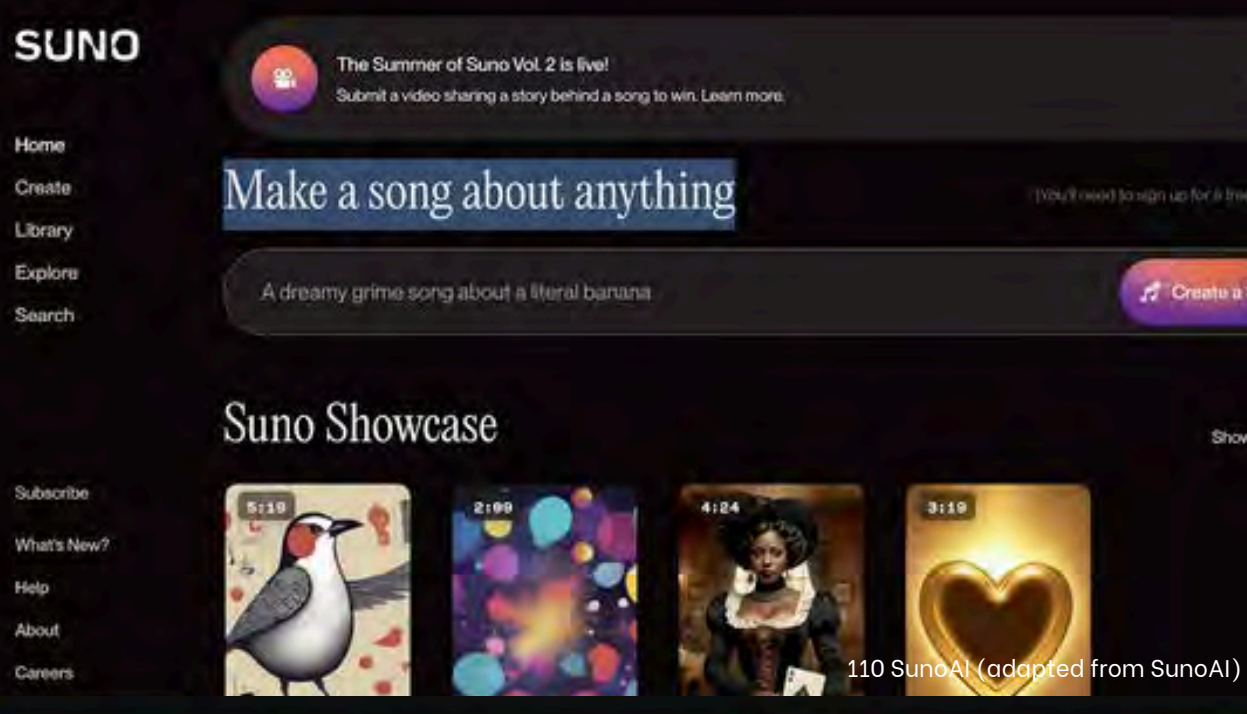
Mr. Tao Minh Hung

Vietnam Country Head at IFPI (International Federation of the Phonographic Industry)





109 Techcombank's AI Music Composition Contest (adapted from Techcombank)



110 Suno AI (adapted from Suno AI)



111 Artist Le Thuy's voice was imitated by AI (ảnh từ YouTube)

CASE STUDY: INNOVATIVE, USEFUL AND CONTROVERSIAL APPLICATIONS OF AI

2024 witnessed an explosion in AI applications in Vietnam's music industry, spanning from creativity to legal controversies. **Techcombank's campaign, *Striving for a Superior Version*, leveraged AI to allow users to experiment with music composition, resulting in over 10,000 songs being created.** This initiative not only conveyed Techcombank's message of personal ambition and brand alignment but also generated significant social media buzz, enabling efficient utilization of user-generated content.¹⁰⁷

In addition, **Suno Inc., an international AI music company, is gaining widespread recognition in Vietnam with its capability to let non-professionals compose up to 1,200 songs per month using just a few lines of description.** Albums produced via Suno have made their way onto Spotify, ushering in an era where music is more accessible than ever. Over 600,000 users worldwide, including teachers and businesses, have utilized Suno AI to create music for education and software training.

On the flip side, the case involving **People's Artist Le Thuy opposing AI cloning of her voice in K-Pop songs without permission has sparked discussions about ethics and legality.**¹⁰⁸ This incident underscores the risks of AI distorting the value of art and the identity of artists, calling for stricter regulatory oversight. These events highlight both the potential and challenges for the creative industry as AI continues to evolve.

107 Techcombank uses AI to create thousands of songs inspired by VnExpress E-Newspaper
 108 People's Artist Le Thuy is upset because AI imitated her voice by VnExpress E-Newspaper



7. RISE OF LIVE MUSIC EVENTS

The strong growth of live music performances in Vietnam shows a major change in entertainment habits, as more and more people choose to participate in these events. In 2024, the market witnessed a diversity of forms and scales of performances, from youth festivals such as *Nhung Thanh Pho Mo Mang*, *GENfest*, *Hoi Dong Hoi*, to private live shows by My Tam, Ha Anh Tuan, Trung Quan, Vu., and branded music events such as *Viettel Y-Fest*, *Sting Ravolution*, or large-scale idol-culture concerts such as *Anh Trai Say Hi* and *Anh Trai Vuot Ngan Chong Gai* with tens of thousands of audiences.¹¹² **These events not only strengthen the connection between artists and audiences but also promote the consumption of music products and online interactions after the event, creating rich music experiences, contributing to changing the Vietnamese music market.**



114 GENfest music festival (adapted from GENfest)



115 Ravolution Music Festival (adapted from Ravolution Music Festival)



116 Y-Fest Customer Appreciation Super Concert (adapted from Viettel)



117 Trung Quan at Live concert 1689 (adapted from Doanh Nhan Tre)

41%

Vietnamese people travel to attend live concerts, both domestically and internationally¹¹³

112 *Future of large-scale concerts with Vietnamese artists after "Anh Trai Say Hi"* by Du Lich TPHCM Magazine

113 *Vietnamese consumers rank second in Asia-Pacific for concert tourism: Visa data points to 3 trends for 2024* by Visa

RISE OF LIVE MUSIC EVENTS: IMPLICATIONS



Live music performances bring significant opportunities for the music industry and its related partners. For artists, these events serve as a platform to attract a broader and more diverse audience. These events also enhance engagement and boost music streams on digital platforms like YouTube and Spotify.

For brands, sponsoring or collaborating with live music events is an effective way to increase brand awareness, particularly among younger audiences. Brands can capitalize on opportunities such as selling exclusive co-branded merchandise with artists, setting up on-site activation booths, and leveraging digital connections to engage with music-loving consumers.

Although these events are attracting growing audiences, they still face several challenges. The growing frequency of music events requires organizers and artists to carefully balance production costs, sponsorship revenue, and ticket sales targets to ensure profitability. This includes challenges such as securing suitable venues, managing artist schedules, and marketing events effectively in a competitive landscape. Nonetheless, this growth highlights that live performances will continue to play a key role in Vietnam's music market.



“The Vietnamese music industry will rely on two factors: (1) the number of people paying for music streaming applications, and (2) the level of attendance at live music events. Although Vietnamese audiences have started attending concerts more frequently, the attendance rate is still lower compared to other Southeast Asian countries. For the market to truly grow, attending live music events needs to become a habitual practice. This will help create a more sustainable concert market, allowing artists to thrive and the music industry to flourish.”

Mr. Tran Thang Long

Head of Domestic Artists & Repertoire and Marketing at Universal Music Vietnam



CASE STUDY: NOTABLE YEAR-END LIVE MUSIC EVENTS

The year-end festival season of 2024 witnessed an explosion of music events, affirming the robust development of Vietnam's live performance market.¹¹⁸ **GENfest 2024**, with the theme *Streets Within Streets*, took place at the end of November, drawing attention with a stellar lineup of artists such as Suboi, Andree, PSY, and LOCO, offering a unique blend of music and culture.¹¹⁹ Simultaneously, **Nhung Thanh Pho Mo Mang Series** spanned all three regions of the country, featuring popular artists like Den, tlinh, Chillies, and numerous indie performers, captivating young audiences. Notably, the **8WONDER Winter 2024** event on December 8 in Ho Chi Minh City drew significant attention with the legendary global band Imagine Dragons performing alongside top Vpop artists like Soobin, Chi Pu, and GERDNANG.¹²⁰ Concurrently, the **Ravolution Music Festival** on December 7 in Thu Duc City gathered an impressive lineup of international DJs, promising an exceptional electronic music night. Following this, the **Anh Trai Vuot Ngan Chong Gai** and **Anh Trai Say Hi** concerts returned to Hanoi in December, heating up the wave of "domestic idol fandom." **HoZo International Music Festival** continued to establish itself as the top international music event in Vietnam, taking place from December 13 to 15 in Ho Chi Minh City, featuring over 100 international artists and My Tam.¹²¹ Wrapping up the year, the **City Tet Fest Thu Duc 2025**, held from December 28 to January 1, 2025, showcased 40 international and domestic artists, led by JustaTee, along with an extravagant **live show by Ho Ngoc Ha** at the Saigon Riverside Park.¹²² These events not only set new entertainment standards but also propelled Vietnam's music industry to greater heights.

118 The potential of Vietnamese concerts and music events before the "gateway" of integration by ELLE Magazines

119 GENfest 2024: Music connects communities by Nguoi Lao Dong Newspaper

120 Ho Chi Minh City explodes with 'super music festival' by Thanh Nien Newspaper

121 HOZO 2024 - Vietnam's largest community music festival returns for 3 months, with My Tam by Tuoi Tre Newspaper

122 Top 5 blockbuster music festivals ready to explode the year-end festival atmosphere by Thanh Tra Newspaper



123 Poster music festivals (adapted from Facebook)

123 Poster HOZO (ảnh từ Facebook)



8. DIVERSITY OF ARTIST UNIQUE IDENTITIES

In 2024, artist identity has proven to be an important part of the Vietnamese music industry. More and more artists are leading the entire music production process, from writing lyrics and composing melodies to producing and building their personal image. This allows them to express their musical personalities while ensuring consistency and uniqueness in their crafts. This allows artists to convey their personal stories, emotions, and messages more authentically, thus creating a deeper connection with the audience.¹²⁴

This trend is present in many different generations and music genres, from young Gen Z artists like Wren Evans, Grey D, and tlinh to established names like My Tam and Ha Anh Tuan. In an age where audiences increasingly demand authenticity from strong identities, artists who can maintain artistic integrity **create lasting cultural impact, building loyal fan bases, increasing engagement, and expanding their influence both domestically and internationally.**

124 Tung Duong: The highest value of a singer is singing culture by VTV Online

DIVERSITY OF ARTIST UNIQUE IDENTITIES: IMPLICATIONS

The influence of an artist's unique identity is creating numerous opportunities for both artists and businesses in Vietnam's music industry. Artists with distinctive styles can build loyal and sustainable fan communities. This leads to increased attendance at performances and higher revenue from digital music and merchandise. Brands collaborating with these artists can leverage fan enthusiasm through event sponsorships, exclusive products, or campaigns centered on the artist's authentic story.

To effectively capitalize on this trend, businesses should align with the artist's storytelling and style in brand-building, focusing on long-term investment rather than pushing for short-term commercial gains.

Furthermore, management companies should respect the creative freedom and individuality of artists to enhance fan engagement. By allowing artists to express themselves authentically, management companies can foster a stronger connection between artists and their fans through personal narratives and behind-the-scenes content.

“

“The ability of artists to build their personal identity is increasingly emphasized in the music market. This is particularly evident among the younger generation of artists, as they share personal stories, mental health challenges, and their dreams. They understand the importance of leveraging their personal narratives in their artistic journey and utilize tools such as social media and Reels to engage with fans.”

Ms. Nghiem Phuong Thao

Founder & CEO
at VMIN (Vietnam Music Industry Network)

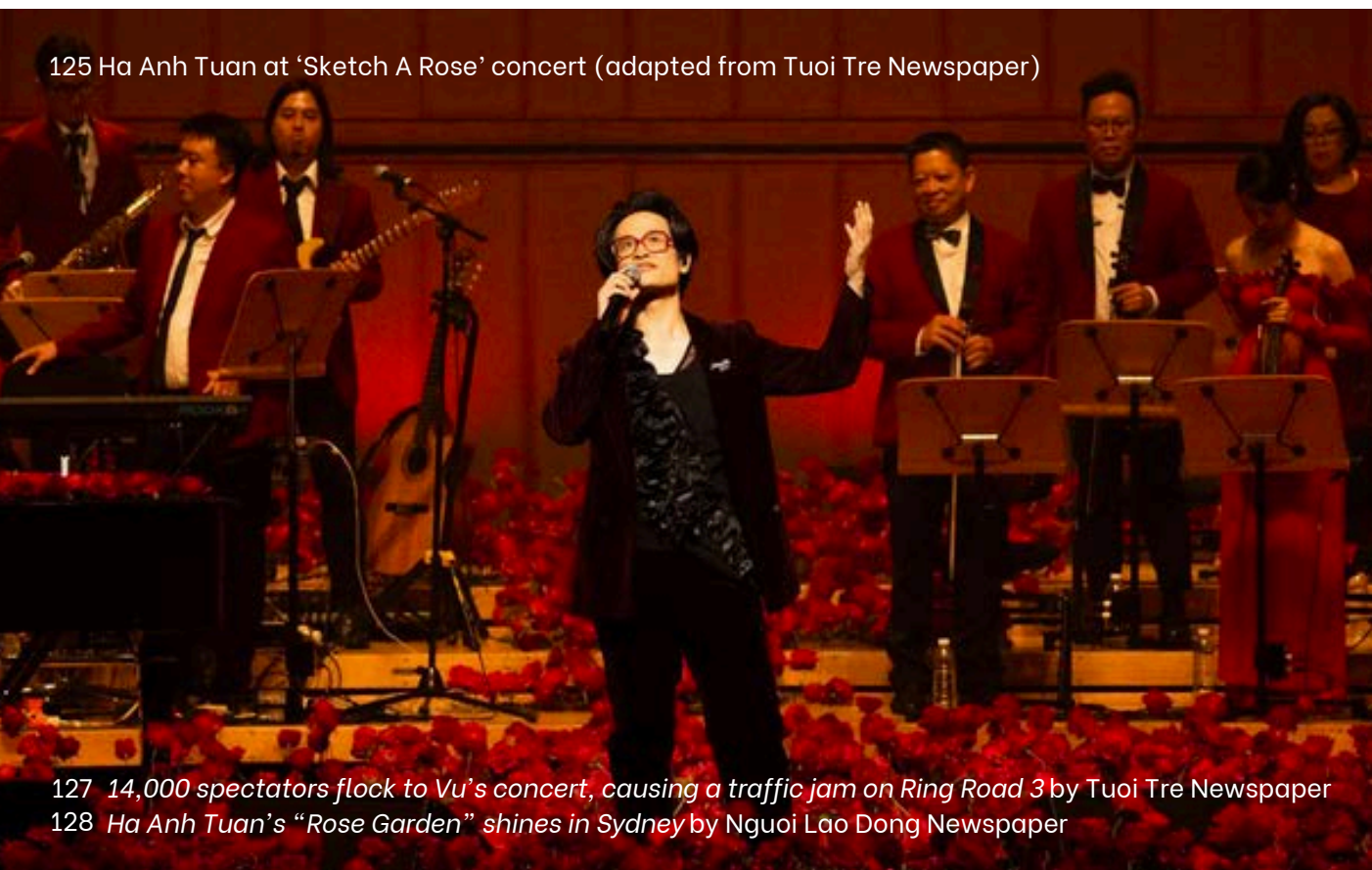


CASE STUDY: HA ANH TUAN & VU.: PRINCES OF LOVE SONGS & INDIE

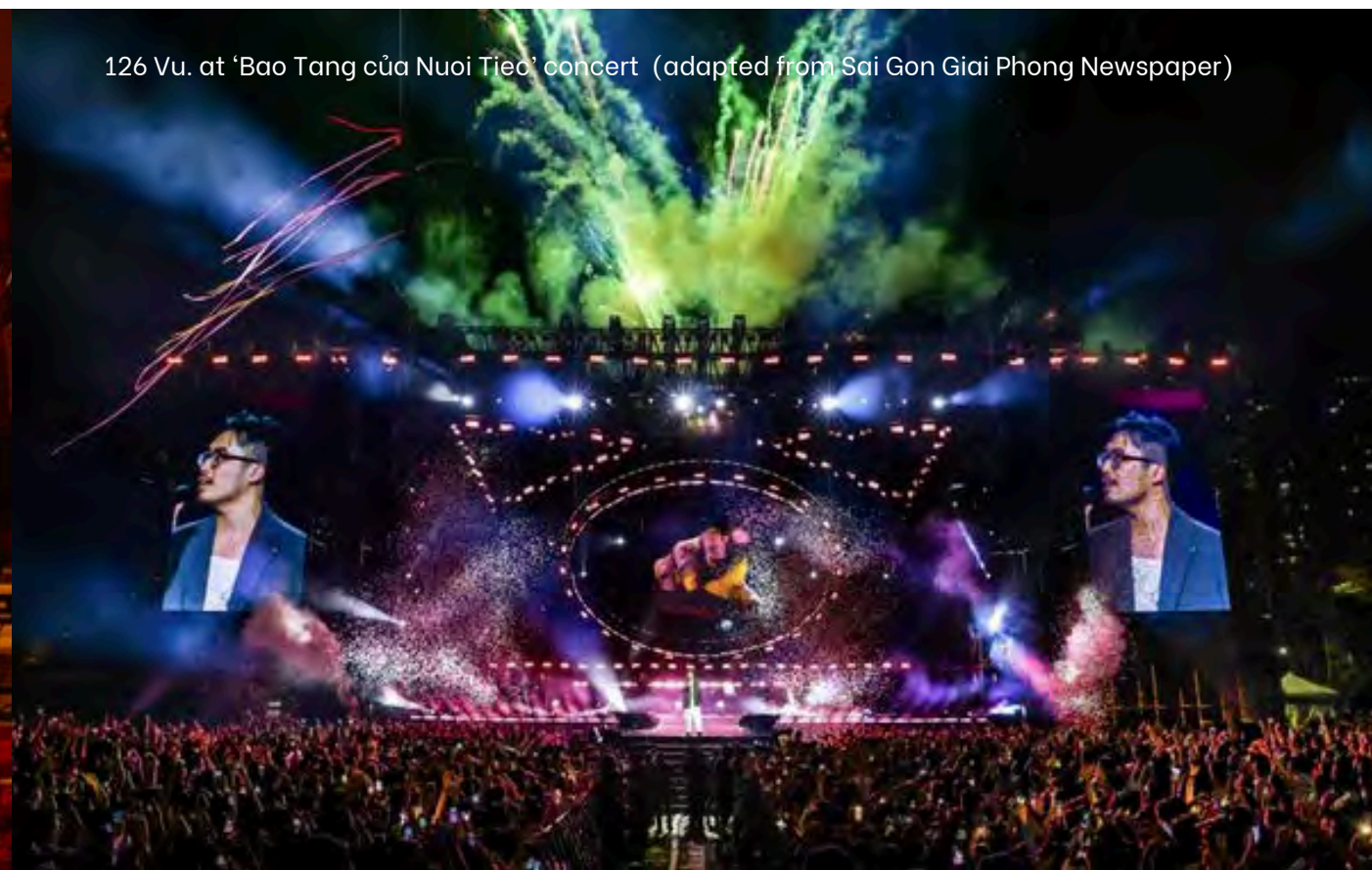


Ha Anh Tuan, known as the *Prince of Love Songs*, and Vu., the *Prince of Indie*, are 2 artists with their own identities and musical authenticity who have conquered audiences in Vietnam and internationally. **Ha Anh Tuan stands out with his emotional storytelling and gentle, elegant performance style.** Instead of grandiose promotions, he brings authentic experiences through each performance. In 2024, his concert *Sketch A Rose* in Singapore and Australia, with songs like *Xin Cho Toi* and *Chua Bao Gio*, created memorable experiences, affirming Ha Anh Tuan's unique identity in the hearts of fans across generations at home and abroad.

Meanwhile, **Vu., with his narrative, emotional, and somewhat melancholic musical style about love**, has affirmed his position through self-composed songs like *La Lung* and *Binh Yen*. In 2024, his concert *Bao Tang Cua Nuoi Tiec* in Ho Chi Minh City and Hanoi attracted 22,000 spectators, demonstrating Vu.'s strong connection with fans.



125 Ha Anh Tuan at 'Sketch A Rose' concert (adapted from Tuoi Tre Newspaper)



126 Vu. at 'Bao Tang của Nuoi Tiec' concert (adapted from Sai Gon Giai Phong Newspaper)

22,000

audiences at Vu.'s concert *Bao Tang Cua Nuoi Tiec* in Ho Chi Minh City and Hanoi¹²⁵

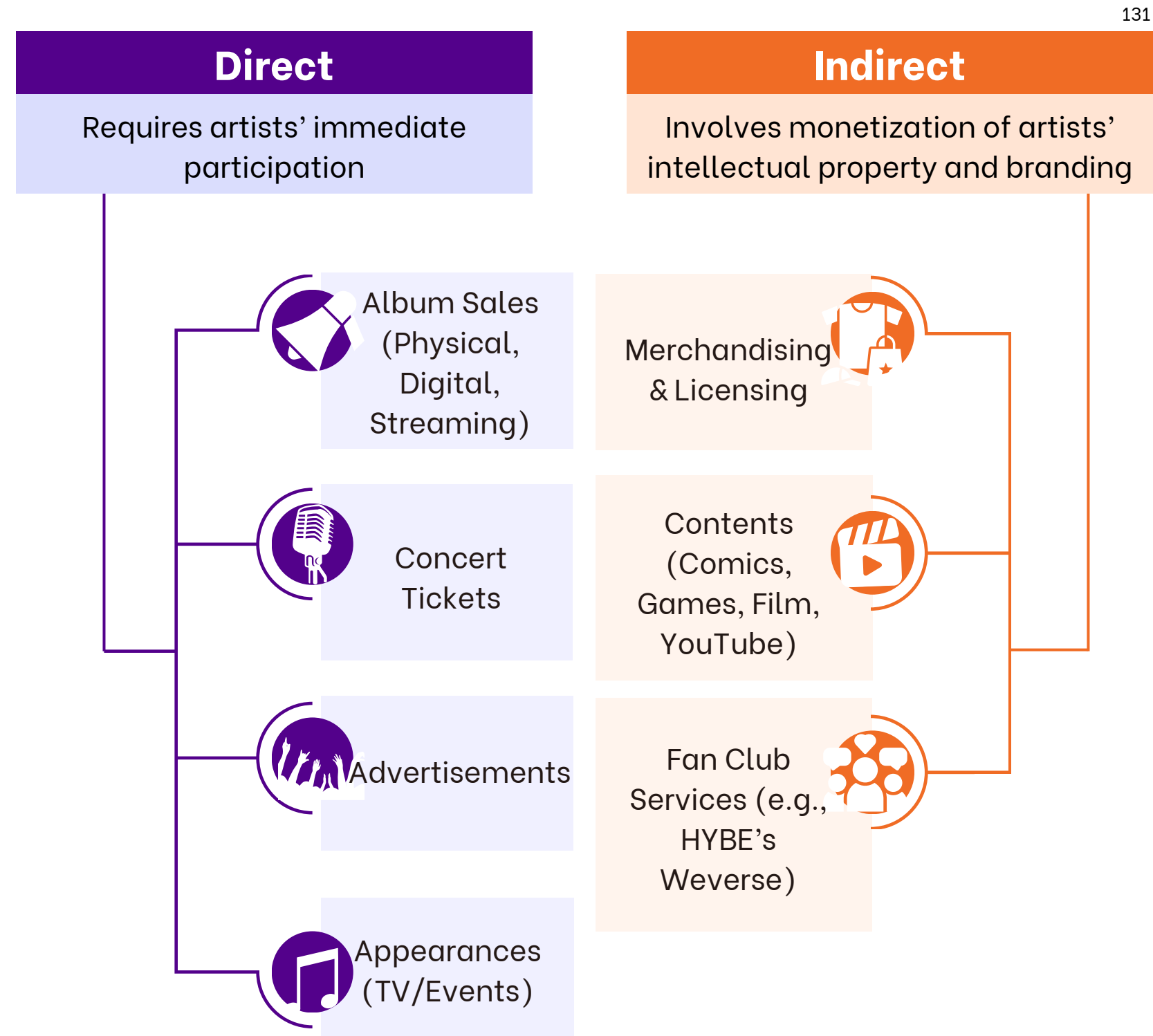
6,000

audiences at Ha Anh Tuan's concert *Sketch A Rose* in Singapore and Australia¹²⁶

127 14,000 spectators flock to Vu.'s concert, causing a traffic jam on Ring Road 3 by Tuoi Tre Newspaper

128 Ha Anh Tuan's "Rose Garden" shines in Sydney by Nguoi Lao Dong Newspaper

9. DIVERSIFICATION OF ARTIST INCOME STREAMS



The income structure of artists is becoming more diverse, divided into two groups: direct and indirect. Direct income includes album sales (physical, digital, streaming), concert tickets, advertising, and appearances at events. Indirect income comes from commercializing the artist's personal brand through franchising, digital content (films, comics, YouTube), fan club services, and merchandise sales. Direct revenue from advertising and events still accounts for a significant portion of artists' income. In recent years, however, income sources have become more diverse thanks to the emergence of music distribution through online platforms, music shows, and other indirect services.¹²⁹ **Applying a diversified income model helps Vietnamese artists cultivate stronger relationships with fans, achieve financial stability, and promote the sustainable development of their careers. This allows artists to be less reliant on any single income stream, reducing their vulnerability to market fluctuations and supporting their long-term artistic endeavors.**¹³⁰

89%

Vietnamese people use digital platforms to enjoy copyrighted music, contributing to increasing artists' income¹

¹²⁹ Strange phenomenon of Vietnamese music by Tien Phong Newspaper

¹³⁰ Enterprises pouring money into Vietnamese singers - 'double-edged sword' by Vietnamnet

¹³¹ K-Pop industry: Overview and general outlook by PGP

¹ Global Music Market Report 2024 by International Federation of the Phonographic Industry (IFPI)

DIVERSIFICATION OF ARTIST INCOME STREAMS: IMPLICATIONS

Diversified income streams help artists reduce reliance on one or two revenue sources, ensuring financial stability even during challenging times such as economic crises or the COVID-19 pandemic when the number of live performances drops significantly. However, this trend also presents new challenges for artists. To take advantage of these opportunities, artists must develop new skills and expand their activities into various entertainment sectors. They also need to strategize financial management to make smart decisions, all while maintaining the quality of their music and personal image. Consequently, competition in the industry also intensifies as artists must stay prominent and active across multiple platforms.

For brands, the diversified income streams of artists provide more collaboration options. This could include sponsoring online content, partnering on merchandise lines, or integrating music into brand activations across various platforms. Artists who understand branding and marketing become more attractive partners, and such collaborations also help artists expand the reach of their music.

“

“Artists need brands for support to help their songs reach a wider audience. Brands also need artists to enhance their image. This is a mutually beneficial relationship, and brands are very selective when choosing artists to collaborate with. Artists not only need talent but also economic awareness, aiming for sustainable business development in the future.”

Ms. Pham Hong Thuy Van

Artist – Founder & CEO
at SHeGAN



CASE STUDY: SON TUNG M-TP'S DIVERSE SOURCES OF INCOME



134 Son Tung MTP performed at Y-Fest (adapted from Viettel)



135 Son Tung MTP advertised for Ponnie (adapted from Facebook)



136 Merchandise 'Be The Sky' collaborated with Son Tung MTP (adapted from Facebook)



137 Poster 'Sky Tour' movie (adapted from Facebook)

Son Tung M-TP is a typical example of income diversification, combining both direct and indirect sources of income. In terms of direct income, he earns huge revenue from streams and views of his hit songs on digital platforms such as YouTube, Spotify, and Zing MP3. Son Tung M-TP's YouTube channel is estimated to bring in revenue of USD 81,600–1,300,000 (roughly VND 2.01–32.05 billion) per year.¹³² Son Tung M-TP's concerts and live performances always attract a large audience, with an estimated rate of up to VND 1 billion/show.¹³³ In addition, his role as a brand ambassador for MBBank and Ponnie in 2024 has contributed to a significant increase in income from advertising and event participation.

In addition, Son Tung M-TP effectively utilizes indirect revenue through his SKY fandom, with exclusive products and events. For example, the music documentary *Sky Tour* released in 2020 earned more than VND 5 billion after 3 days of release. Most recently, the *BE THE SKY* merchandise series continued to make its mark. He also built his personal brand through digital content such as behind-the-scenes videos and creative activities on social networks, helping to expand his sphere of influence.

132 How much money does Son Tung M-TP make from his billion-view YouTube channel by CafeF

133 Crazy rates of Son Tung and My Tam at present by VTC News

10. FRAGMENTATION IN EVALUATING ARTIST ACHIEVEMENTS

The current system of recognizing the achievements of Vietnamese artists is fragmented and inconsistent. **Unlike standard systems such as the *Grammy* in the West or *Perfect All-Kill (PAK)* in Korea, Vietnam does not have a centralized organization to comprehensively measure the achievements of artists.** Although traditional awards such as *Cong Hien*, *Lan Song Xanh*, and *WeChoice* are still considered prestigious, they have limitations. Each award is organized by a separate unit, serves a different audience, and has its own jury. This makes them unable to comprehensively reflect the artist's ability. Meanwhile, in the context of more artists using international platforms to promote their products, 'new-style achievements' based on data from DSPs and social networks (YouTube, Spotify, Apple Music, etc.) are increasingly popular, especially with young artists, because they directly reflect the audience's interest.¹³⁸ However, the lack of a standardized system for recognizing achievement leads to much debate about how to measure it. Some argue for prioritizing commercial metrics like streams and sales, while others emphasize artistic merit and critical acclaim. This makes the assessment of success subjective and controversial.

¹³⁸ Why Son Tung and HIEUTHUAI's achievements cause controversy by ZNews



FRAGMENTATION IN EVALUATING ARTIST ACHIEVEMENTS: IMPLICATIONS

The inconsistency in performance measurement systems creates both opportunities and challenges. Beyond traditional awards judged by panels, artists can leverage various platforms to showcase their achievements, from YouTube to Spotify and Apple Music. However, this also creates confusion for brands, audiences, and even artists themselves when assessing success. Brands may struggle to select artists for collaboration due to the lack of clear criteria for comparing achievements. Fans can become confused, leading to debates over artists' accomplishments and true popularity.

To establish credibility despite these challenges, artists must proactively utilize and build their presence across multiple ranking systems and awards to maximize visibility and achievements. Simultaneously, the need for a formal and reputable system is becoming increasingly urgent to ensure fairness and transparency in recognizing artists' accomplishments. This would not only provide a clear benchmark for success but also help foster a more competitive and credible music industry in Vietnam.

“

Traditional awards such as Cong Hien, Lan Song Xanh, and WeChoice remain highly prestigious in Vietnam's music industry, with each catering to different audiences and offering unique perspectives. However, the current trend has shifted toward evaluating achievements based on platforms like Zing MP3, YouTube, Apple Music, and Spotify. Interestingly, artists increasingly use accomplishments on DSPs as benchmarks for their success. For instance, appearing in annual Recap/Wrapped projects of DSPs has become a significant milestone for them each year.”

Ms. Tran Thi Mai Anh

Business Development Manager
at Zing MP3 & Zing Media

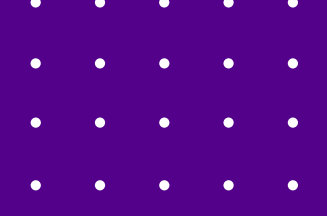




CASE STUDY: CONTROVERSY ABOUT WREN EVANS'S PERFECT ALL-KILL

Wren Evans—a promising Gen Z artist from Vietnam—also had to struggle because of the fragmentation in the music recognition system. In 2024, when Wren Evans announced that he had achieved a *Perfect All-Kill (PAK)* with the song *Tung Quen*, many controversies arose because the concept of PAK is only popular in K-Pop and has no equivalent standard in V-pop.¹³⁹ The PAK system in Korea requires a song to top all charts at the same time, in real-time, daily, weekly, and hourly. Moreover, this title is recognized by a reputable neutral organization that monitors data from all platforms. Users can also directly access other music-listening websites, such as Melon, VIBE, etc. to compare data. In Vietnam, although Wren Evans topped 7 charts, he and his team relied on data that had not been updated and verified in real-time to subjectively and spontaneously declare the result, which raised doubts about the validity of this achievement. Not only that, his other colleagues such as HIEUTHUAI and Vu. also self-claimed PAK when measured across different charts and platforms, calling into question the consistency of the title. **This underscores that: without an official system to certify these achievements, artists and fans will continue to face uncertainty and controversy over their success.**

/ METHODOLOGY



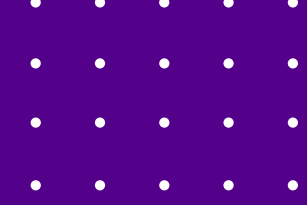
To ensure objectivity, the information in the report is compiled based on many different research methods. First, the team used secondary research from many official sources published in market reports and academic research from reputable sources around the world to have an overview of the global music trends of the audience.

Next, to gain a deeper understanding of audience preferences and the development of the music industry, the team conducted primary research. For quantitative research, the research team conducted a 2-phase survey (1/2024 and 7/2024) with 643 digital music listeners across Vietnam. The team then conducted qualitative in-depth interviews with 20 experts and managers from leading Vietnamese and foreign cultural and music companies operating in Vietnam in September, October, and November 2024.

To make the report more objective, the report also compared the changes in the digital music industry in Vietnam in 2024 with the trend forecasts published in the white paper “Vietnam Digital Music Landscape 2023-2024” (December 2023), thereby adjusting the published information and forecasting the market situation in 2025.

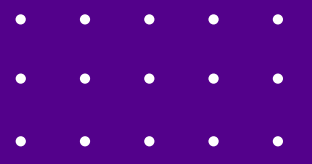


/ TERMINOLOGY



- **2 Ngay 1 Dem (Reality TV Show):** 2 Days 1 Night
- **Anh Em Ket Doan (Concert):** Brothers United
- **Anh Trai Say Hi (Music TV Show):** Brothers Say Hi
- **Anh Trai Vuot Ngan Chong Gai (Music TV Show):** Call Me By Fire
- **Bao Tang Cua Nuoi Tiec (Concert):** Museum of Regret
- **Bung No 0 Dong (Fan-led Charity Project):** Zero Dong Full Tummy
- **Chi Dep Dap Gio Re Song (Music TV Show):** Sisters Who Make Waves
- **Cong Hien (Award):** Dedication
- **Dong Song Tam Hon (Concert):** River of Souls
- **Em Xinh Say Hi (Music TV Show):** Sisters Say Hi
- **Gieo Mam Thien Tam (Concert):** Sowing Seeds of Kindness
- **Hoi Dong Hoi (Concert):** Council Assembly
- **Lan Song Xanh (Award):** Green Waves
- **Live Tour May Lang Thang (Concert):** Clouds Wandering
- **Nhac tre Viet Nam (Playlist):** Vietnam's Young Music
- **Nhung Thanh Pho Mo Mang (Concert):** Dreamy Cities
- **Nuoi Em (Fan-led Charity Project):** Raise Children
- **Rap Viet (Music TV Show):** Vietnamese Rap
- **Thien Ha Nghe Gi (Playlist):** What People Listen To
- **Tri Am (Concert):** Kindred Souls
- **V-pop: Hits Quoc Dan (Playlist):** V-pop: National Hits

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APPENDICES



Forecasted Music Trends in
the 2023-2024 Report and
Related Notable Events



1. THE CREATOR ECOSYSTEM: BLUEPRINT OF THE INDUSTRY

CHI XE - FROM TIKTOK PHENOMENON TO PROFESSIONAL ARTIST

In 2024, the digital content creation ecosystem like TikTok has not only changed the way people reach the public but has also become a place to nurture young artists. A typical example is Chi Xe, who has used TikTok to build her personal brand and expand her artistic journey. Initially, she became famous through million-view videos like *Ai* and *Hai ban tay cua em*, thanks to her clear voice and relatable content. In August 2024, Chi Xe released her first MV *Seenderella*, collaborating with Kai Dinh and producer NewL, marking her transformation from an online phenomenon to a professional artist. Next, the MV *Y Em La* in collaboration with Trang Phap helped her spread her influence, affirming the role of the creative ecosystem in shaping artists in the digital age.¹⁴⁰

3 million YouTube views after 3 months of releasing MV *Seenderella* *

1.3 million Spotify streams after 3 months of releasing the song *Seenderella* *

142 Chi Xe (adapted from Nguoi Lao Dong Newspaper)



2. LOCAL ADAPTATIONS WITH GLOBAL STANDARDS

VUONG BINH - A BREAKTHROUGH IN DEBUTING NEW ARTISTS

The professionalization of Vietnamese music, predicted in 2023, has continued to grow strongly in 2024. Vuong Binh, a former member of boy group MONSTAR managed by ST.319 Entertainment, released the album *Anh Bo Vai* under the guidance of music director Hua Kim Tuyen and the S.HUBE Label team, which brings together leading producers such as WOKEUP and DuongK. The album demonstrates the connection between music and personal identity, along with a professional production process, including teasers, MVs, and playlists released simultaneously on major music streaming platforms such as Spotify, Apple Music, YouTube, Zing MP3, and Nhaccuatui. Vuong Binh's debut not only affirms his artistic ability but also demonstrates professionalism in management and promotion, marking the progress of Vietnamese music on the journey to reach global standards.

¹⁴⁰ Chi Xe - From TikTok phenomenon to professional singer by Sports and Culture Newspaper

¹⁴¹ Achievements of the album *Bo Vai* by St.319 Entertainment

* **Disclaimer:** All information is current as of December 2024

#1 Apple Music Vietnam after 6 days of releasing the album *Anh Bo Vai* ¹⁴¹

143 Vuong Binh (adapted from Facebook)

5 bản nhạc bạn nghe nhiều nhất năm 2024

Đừng Làm Trái Tim Anh Đau
Sơn Tùng M-TP
Tổng cộng 51 lần nghe

Những Lời Hứa Bỏ Quên
Vũ. và Dear Jane

Đại Lộ Mặt Trời (Japanese Version)
Chillies và MORISAKI WIN

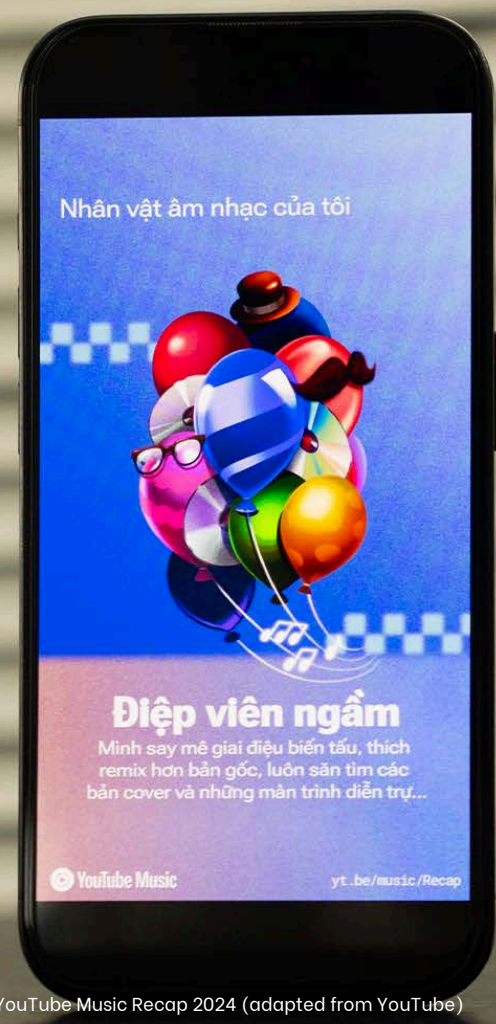
Ai Gieo Chử Đắng
Andree Right Hand, RHYDER và...

Dành Hết Xuân Thi Để Chờ Nhau
Vũ. và Hà Anh Tuấn

© YouTube Music

yt.be/music/Recap

146 YouTube Music Recap 2024 (adapted from YouTube)



3. PERSONALIZED MUSIC ALGORITHM

YOUTUBE MUSIC 2024 RECAP - PERSONALIZED MUSIC JOURNEY

Over the past year, personalized algorithms have continued to shape the way people listen to music and connect with artists online. *YouTube Music 2024 Recap* features *Music Personas*, which reflect individual users' musical tastes, such as *Undercover Agents* for remix lovers. This feature comes with song statistics, favorite artists, a timeline of music listening, and podcast data – a breakthrough. The presentation in the form of Instagram Stories is not only easy to share but also encourages the discovery of new genres. Personalized algorithms not only help users relive their musical journeys but also create opportunities for artists to increase streams and promote further. *YouTube Music 2024 Recap* proves that personalization is the key to connecting artists and audiences.¹⁴⁴

4. RISING OF INDIE & UNDERGROUND

INDIE & UNDERGROUND CONTINUES TO BE WIDELY WELCOMED

2024 has witnessed a strong rise in Indie and Underground, as predicted in last year's report. Indie is no longer a niche genre but has reshaped the Vietnamese music market. Many artists have returned with quality albums such as *Mong Manh* of Moi, *Suyt 1* of Ngot or *Tu Vuc Tham Den Ria Anh Sang* of The Cassette. Events such as *CAM Gala* and *Dong Song Tam Hon* have helped Indie reach a mass audience, as many shows are constantly sold out of all tickets. Indie artists have also professionalized with well-invested tours and recording contracts. At the same time, Rap – the symbol of Underground – continues to stir up the market. *Rap Viet* and phenomena such as HIEUTHUHAI, RHYDER, or Phap Kieu from the show *Anh Trai Say Hi* have made Rap a trend among young people.¹⁴⁵ The combination of Indie and Underground diversifies audience tastes, while opening up opportunities for Vietnamese music to reach further.



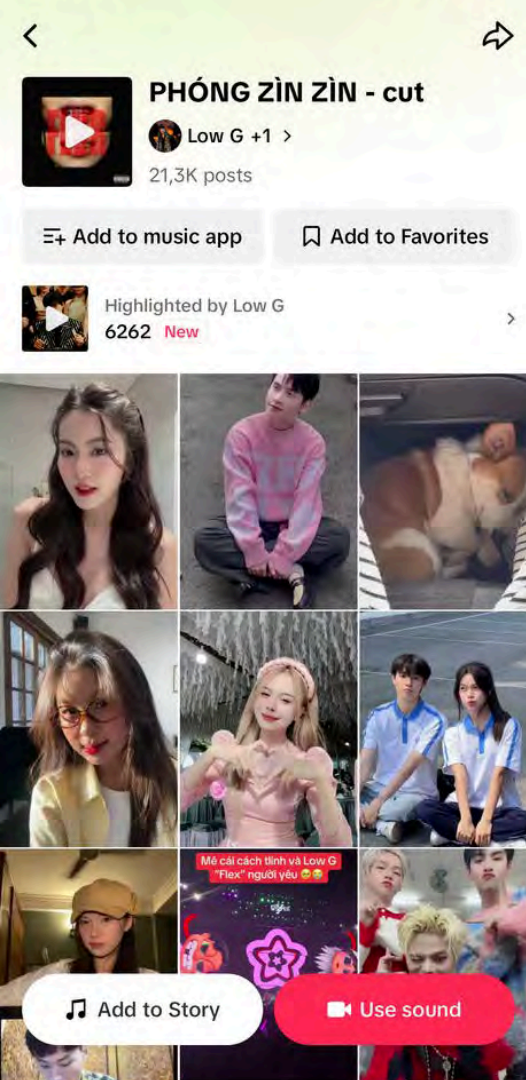
147 Indie Việt (ảnh từ VTV)



148 'Anh Trai Say Hi' show (adapted from VieOn)

144 YouTube Music Released 2024 Recap: Statistics of the entire history of music and podcast listening through 25 stories by VatVo Studio

145 HIEUTHUHAI and the dominance of rap in Anh trai say hi by Lao Dong Newspaper



5. "FAST MUSIC" ERA

PHONG ZIN ZIN - THE EXPLOSIVE HIT IN THE "FAST MUSIC" ERA

The era of “fast music” and platforms like TikTok has been the launching pad over the past year for short, memorable, and viral songs, typically *Phong Zin Zin* by tlinh and Low G. With its bright melody, witty rap lyrics, and adorable messages about love, the song not only attracted listeners but also created a hit on social networks. The explosion of *Phong Zin Zin* is evidenced by tens of thousands of TikTok videos using the song as background music, from spontaneous dance moves to everyday moments. The song’s spontaneity and freedom have strongly connected with the younger generation, making it a viral hit. *Phong Zin Zin* with its accessibility has reshaped the way modern music connects with the public, affirming the position of Vietnamese rap/hip-hop in the modern music flow, especially on digital platforms.¹⁴⁹



151 Low G and tlinh in 'Phong Zin Zin' (adapted from Low G)



6. FOLKTRONICA

RE-ENACTING FOLKLORE CULTURE THROUGH "ANH TRAI VUOT NGAN CHONG GAI"

Anh Trai Vuot Ngan Chong Gai left a strong impression in 2024, continuing to emphasize folk and contemporary music. Outstanding performances such as *Me Yeu Con* and *Trong Com* not only entertain but also arouse cultural pride, reviving traditional values in the hearts of young audiences. People’s Artist Tu Long shared: “Culture is essence! Culture is origin! Culture is nation”.¹⁵⁰ The performance *Trong Com* which he collaborated with SOOBIN Hoang Son and Cuong Seven innovated while still maintaining the national identity, attracting a strong response from the online community. The show is not only a music stage but also a cultural bridge, affirming the role of music in preserving and developing national identity. This success has opened up a new direction, where tradition and modernity blend, promoting the sustainable development of Vietnamese music culture.



149 Review of EP “FLVR”: tlinh returns, Low G remains strong by ELLE Man Magazine
 150 People’s Artist Tu Long spreads traditional culture in ‘Anh trai vuot ngan chong gai’ by Thanh Nien Newspaper
 *Disclaimer: All information is current as of December 2024

152 'Anh Trai Vuot Ngan Chong Gai' TV show (adapted from Yech1)

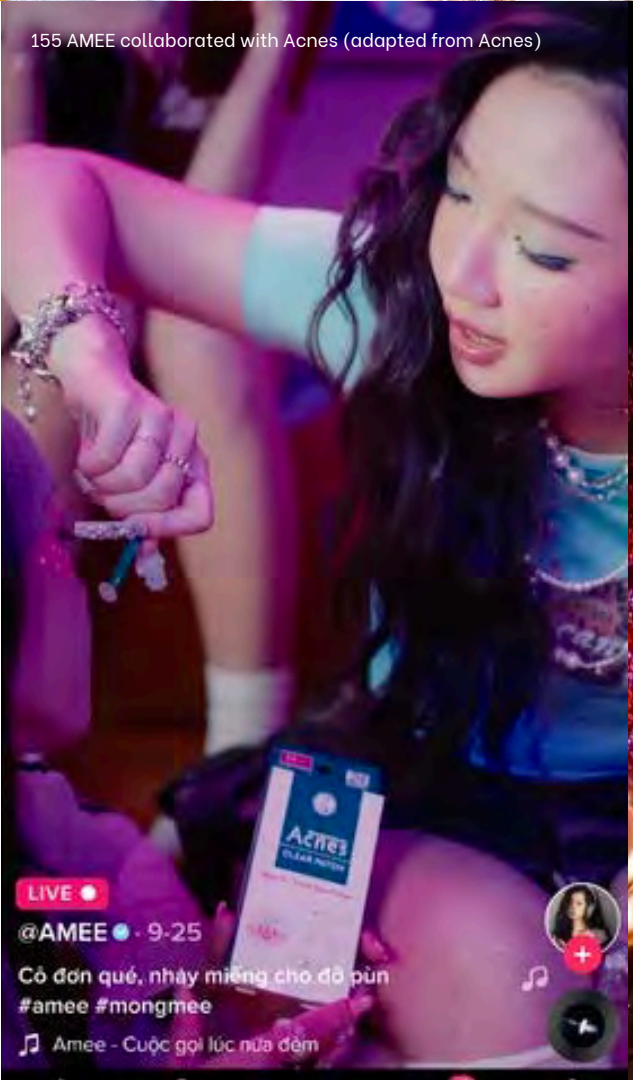


7. “FANFUNDING”: CONTENT CREATOR DONATIONS RISE FOR ARTISTS

FC SUNDAY OF HIEUTHUHAI AND FUNDRAISING CULTURE

In 2024, fan fundraising activities emerged strongly, especially in idol-group reality shows, becoming a driving force for organizing events and connecting artists with fans. HIEUTHUHAI’s *FC Sunday* is a typical example. With more than 133,000 followers, this community has raised funds beyond expectations, such as the birthday project in 8/2024 reaching more than VND 145 million, exceeding the target by 145%. At *GENfest*, fans called for VND 13 million to sponsor food trucks, while expecting to raise VND 106 million for the *Anh Trai Say Hi* concert in December. In addition, *FC Sunday* also carried out activities such as volunteering, running LED screens, organizing check-in booths, and giving gifts to fans, strengthening the connection between artists and fans. These successes affirm the role of fandom in developing Vietnamese music.¹⁵³

305 million VND successfully raised funds of *FC Sunday* for HIEUTHUHAI’s support projects in 2024*



8. COMMERCIALIZED MUSIC

AMEE X ACNES & VIETTEL Y-FEST: WHEN MUSIC LEADS THE BRAND

The trend of music commercialization in 2024 recorded many impressive campaigns, where art and brand blend. AMEE’s MV *Cuoc Goi Luc Nua Dem*, in collaboration with the brand Acnes, quickly became popular on TikTok and the charts thanks to its creative content and effective promotional strategy. This success shows the influence of artists in touching the audience’s emotions. Similarly, *Viettel Y-Fest 2024* attracted more than 60,000 audiences with top performances from Son Tung M-TP, Hoa Minzy, and HIEUTHUHAI. The event not only promoted the 5G network service but also conveyed the message “Connecting from the heart”, creating a memorable super music festival. These projects demonstrate the development of music commercialization when art and brands work together to win the public.

173 million TikTok views for MV *Cuoc Goi Luc Nua Dem*⁶⁹

2.5 million Viettel Y-Fest 2024 livestream viewers*

⁶⁹ When music becomes a “weapon” in a brand’s marketing strategy by VTV Online
¹⁵³ What we see from the unprecedented fever in Vietnamese showbiz by Tien Phong Newspaper

*Disclaimer: All information is current as of December 2024



9. RESPONSIBLE MUSIC

FUNDRAISING CONCERT NIGHT "ANH EM KET DOAN" BY DUY MANH & TUAN HUNG

The trend of responsible music in 2024 was affirmed through the liveshow *Anh Em Ket Doan* by Duy Manh & Tuan Hung, to raise funds to support people affected by the storm Yagi. On the evening of September 21, the event in Tam Dao attracted 5,000 live audiences and more than 1 million views via livestream, despite the unfavorable weather. The two artists performed more than 30 famous songs, from *Cau Vong Khuyet* to *Tinh Em La Dai Duong*, and auctioned special items, raising hundreds of millions of VND more. In total, the program raised 3 billion VND to the Central Committee of the Vietnam Fatherland Front. The moment Duy Manh and Tuan Hung hugged each other on stage sent a message of solidarity. The liveshow proves that music has the power to spread humanistic values.

3 billion VND

support for flood victims from liveshow ¹⁵⁷

1 million

online and offline viewers ¹⁵⁷

160 Liveshow 'Anh Em Ket Doan' (adapted from VTCNews)



161 Vu. & Dear Jane performed the Cantonese version (adapted from Bazaar Vietnam)

10. BEYOND THE BOUNDARIES

VU. & PHUONG MY CHI BRING VIETNAMESE MUSIC TO INTERNATIONAL LEVEL

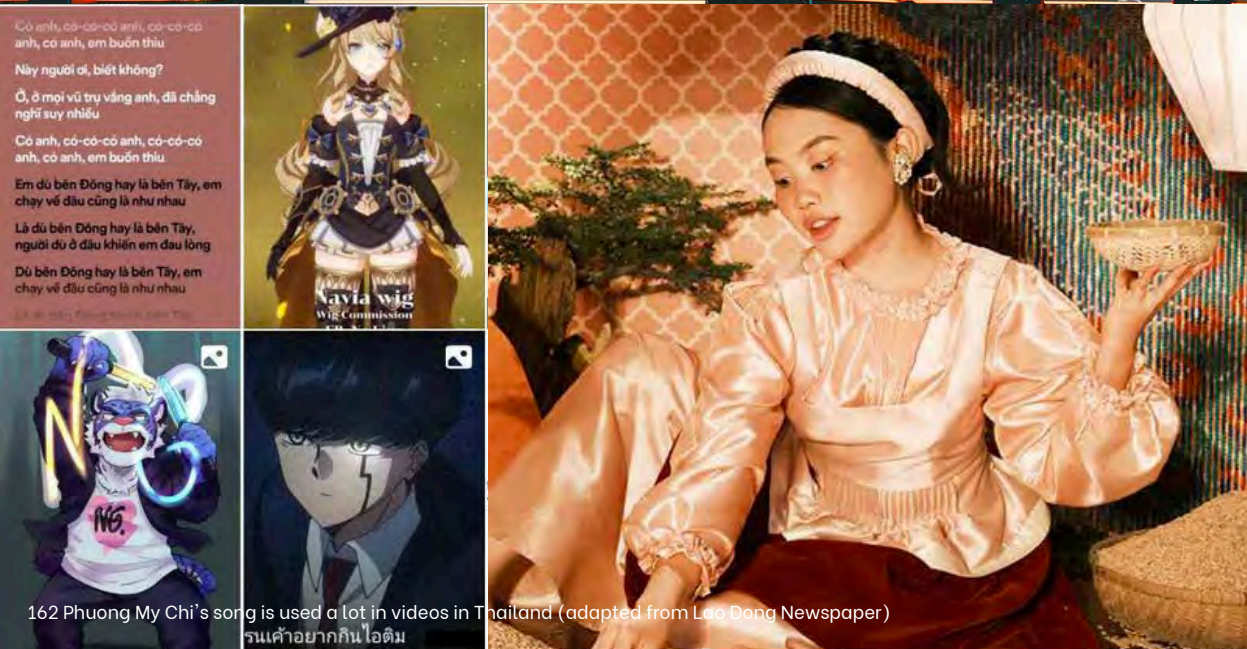
Vu. and Phuong My Chi are 2 typical representatives in strongly spreading the borderless music trend of Vietnam on the international map in 2024. At the *CHILL CLUB Chart Award 2024* in Hong Kong, Vu. collaborated with the band Dear Jane, performing the song *Nhung Loi Hua Bo Quen* in Vietnamese and Cantonese, receiving great support from the audience. Released in late 2023, this song reached #31 on Spotify Hong Kong and #60 on Spotify Global Chart. Meanwhile, Phuong My Chi with the song *Vu Tru Co Anh* unexpectedly became a hit in Thailand, entering the Top 50 Spotify Viral Songs Thailand with 2 versions: the original (#35) and the live version (#19). Both artists are pioneering the way to bring Vietnamese music across borders, opening an era of creativity and global integration.

#31

on **Spotify Hong Kong** for the song *Nhung Loi Hua Bo Quen* by Vu. and Dear Jane ¹⁵⁸

#35

on **Spotify Viral Songs Thailand** for the song *Vu Tru Co Anh* by Phuong My Chi ¹⁵⁹



162 Phuong My Chi's song is used a lot in videos in Thailand (adapted from Lao Dong Newspaper)

¹⁵⁷ Tuan Hung - Duy Manh's music night raised over 3 billion VND, 1 million viewers by VTCNews
¹⁵⁸ Hong Kong audiences showered Vu. and Dear Jane with compliments by Bazaar Vietnam

¹⁵⁹ Vietnamese song suddenly sought after by Thai people, attracting millions of views by Lao Dong Newspaper

A white audio waveform graphic on the left side of the slide, consisting of vertical lines of varying heights that taper off to the right.

VIETNAM DIGITAL MUSIC LANDSCAPE 2024-2025

A white audio waveform graphic on the right side of the slide, consisting of vertical lines of varying heights that taper off to the left.

Professionalization, Co-Creation & Explosion