

68M

INTERNET USERS

6H30M

INTERNET
SPENT DAILY

MOBILE LANDSCAPE

IN VIETNAM 2019 - 2020



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About this report

Purpose & Objective of this report

This report aims to provide marketers with valuable figures of mobile marketing in Vietnam during 2019 – 2020, specifically in terms of raising mobile trends that contributed to the big success of various campaigns.

Report Contributors

“Mobile Ecosystem 2019/2020” report by the MMA is a project led by Adtima with participation from MMA’s network of partners, including Infocus (IFM), Facebook, Kantar Media, Coc Coc and Google.



About this report



Rohit Dadwal
Managing Director
MMA - Asia Pacific

“The reckoner underlines the marketing industry’s certainty when it comes to the rapidly expanding mobile channel. The industry on the whole recognises that the modern era of market is upon us and we need to embrace it. This new age of marketing is going to be built on tools and technology that this report helps to outline along with great examples through the lens of various industry leaders who are the torch bears of this change and helping @shapethefuture for marketers and agencies in India and abroad.



Le Ba An Binh
Head of Adtima

”With 93% penetration, smart phone is the most popular connected device in Vietnam. Consumers now spend most of their time on mobile to work, connect with others, entertain and shop. As the result, mobile marketing has become the key to unlock consumer’s journey on digital. To to that, marketer need to understand about mobile touchpoints and what are consumer’ behaviors on those. At Adtima, we are proud to help businesses to answer questions via our expertise in leading the ecosystem of 60 million users.



PART 1

MOBILE MARKETING

INFRASTRUCTURE

2019 - 2020





Giang Xuan
Facebook

“ Vietnam is a mobile-first country and mobile is the 1st connection point of consumers to anything. Mobile ad spend therefore is rising significantly in recently year and estimated accounts for almost 70% of digital ad spend in line with smartphone ownership, low internet access cost and free-wifi popularity. Digital has become mainstream and advertisers need to accelerate their digital capabilities and drive marketing efficiency with mobile-first approach towards consumers to capture the change and maximise their brands' performance



Vu Anh Nguyen
Deputy CEO
Coc Coc

” This year we saw an acceleration towards online usage because of the pandemic. Mobile Internet has definitely benefited from it and we saw it in higher user engagement metrics. Vietnam has done an amazing job at managing the crisis but consumers still experienced lockdowns and social distancing measures that increased the shift from offline to online and contactless. Once they experienced the convenience of online buying and on demand services, they kept coming back. As smartphone penetration is getting higher, mobile marketing is more and more relevant to reach consumers. At the same time, it is more than ever important to stay relevant while both advertisers and publishers are competing for user attention. So it is crucial to be able to reach the right consumer at the right time in their journey. Businesses who are able to do so and quickly adjust to the changing environment will build a strong relationship with their customers and get most of the benefits.





Definition of Mobile Marketing in Vietnam

- Channels that define Mobile Marketing/ Advertising
- Case studies to illustrate for the application of each Mobile Marketing/ Advertising definition
- Mobile ecosystem in Vietnam



Channels that define Mobile Marketing/ Advertising

Mobile Messaging

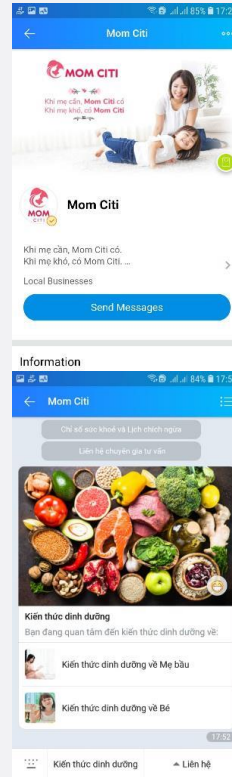
- A standard for messaging systems that allow sending messages between mobile devices that consists of short messages, normally with text only content.

Benefits

- Crisp – Explains purpose & user response expectation in 160 characters
- Economical - Cheaper than many other digital media vehicles
- Ease of use – All mobile users are aware of how SMS works
- Mass reach – 100% of mobile phone users can be reached via this medium
- Save for later – An SMS gets stored in phone for later reference

Limitations

- Linguistic challenge: There are challenges in delivering customized language (script) messages
- Targeting: Third party databases are not a reliable source for reaching a specified TG
- Passive communication: Requires user involvement for a CTA fulfilment
- User Pays : Cost implication for end user



Nutifood Mom City Personalized messaging that meet the needs

Background

- Nutifood desired to Recruit new users and engage with them at the right moments with relevant messages to enhance brand consideration

Key expectations

- Need to capture consumer's journey at individual level
- Need a platform to send message effectively at the key milestones to remind brand message

Solutions

1. Develop brand hub
2. Recruit users
3. Engage with them via personalized message
 - a. Automatic sent via Zalo
 - b. Customized message for each segment
 - Per Trimester
 - Message: provide clinical proven knowledge, highlight product message + trigger purchase
 - Frequency



Channels that define Mobile Marketing/ Advertising

Mobile App

- Software solutions that power the business logic for mobile marketing initiative(s).

Benefits

- Seamless user experience
- Can serve utility or innovative/experiential engagement
- Long sustaining customer relationship and sustenance via offers and content
- High TOM - Users download app for a specific purpose therefore their top of mind recall for the app is high

Limitations

- Multiple Operating Systems
- Costly application development
- Driving traffic and downloads requires additional marketing budgets



Zing MP3

- The original and leading music streaming app
- Full-fledged on-demand music service
- Personalized experience

Premium Display

Make sure your brand pop in the users' sight

Audio Ads

Reach users in screen less music moment

Sponsored & Branded Playlist

Enhance brand message by associating with the right music moments

Promote MV & Audio

Promote your brand's music to million users on Zing MP3

Sponsored MV & Branded MV

Be present in the latest music video, or partner with the top artists to create your own branded music



Channels that define Mobile Marketing/ Advertising

Mobile Video

- Video as a creative type overcomes one of the biggest objections to mobile ads: using sight, sound, and motion to tell a brand's story overcomes the limitations of screen size. Moreover, it builds a dynamic, immersive, rich media ad that works across the fragmented mobile interactive landscape.

Benefits

- A stunning and captivating way for publishers and content creators to share immersive stories
- Increased share-ability
- Marketers can take a deep dive into analytics
- Share, views, complete views, likes and other social interaction all metrics that marketers love to know about
- With vertical video now rising, more and more people will consume videos on mobile as they usually use mobile without tilting the screen horizontally

Limitations

- Viewer has an option to skip the video ads
- Non skippable video ads may make the user hop onto another video
- Many ads are inserted in single video so there is a lot of competition. Therefore, marketers have to go that extra mile to create great content

Using Facebook PockeTVC to create video ads – Success story of Ngoc Dung Beauty Salon



- Ngoc Dung Beauty Salon has used video ads on Facebook to run a campaign to increase brand awareness, thereby reusing an advertising film. The campaign used PockeTVC to re-crop the trailer into a series of 15-second mobile-optimized vertical videos. To know if the mobile-optimized ad is more effective, Ngoc Dung Beauty Salon also runs a video ad with a full, uncut ad clip simultaneously.

Campaign results

- Reaching 3.9 million people
- Increase ad recall by 6 points when switching from long video to short video
- 4 points increase in brand awareness when switching from long videos to short videos

Channels that define Mobile Marketing/ Advertising

Native Advertising

- Native ads give you the control to design the perfect ad units for any channel (across social, video, audio, search, text and is not limited to a platform). With our Native Ad API, you can determine the look and feel, size and location of your ads. Because you decide how the ads are formatted, ads can fit seamlessly in your application.

Benefits

- Native advertising benefits publishers, advertisers and the audience
- Allows for advertisements to be unobtrusive
- Higher audience engagement leading to better CTR

Limitations

- Native is a new advertising format and therefore marketers don't know how to read its performance and where to benchmark it
- Higher spends on creating good content



Leverage Native Content to let audience hear brand's stories

Sport's popularity present a unique opportunity for brands to create content and increase their audience size



Channels that define Mobile Marketing/ Advertising

Rich Media

- Rich media is a digital advertising term for an ad that includes advanced features like video, audio, or other elements that encourage viewers to interact and engage with the content.

Benefits

- Interactive & Dynamic capability: High on interaction catering to audio, video, animation.
- Play me: The RM banner can be a playable format with a gratification fulfilment
- Powerful branding: Even if the ad isn't clicked on, viewers are still more likely to see and remember the ad than traditional display advertising

Limitations

- Size heavy: Takes time to load, need good internet connection to work seamlessly
- High risk on ad blockage

P/S created best brand experience in mobile rich media – Leveraging AR & Messaging

- P/S created the campaign "The Amazing Adventure of King Leo and Friends" to encourage Vietnamese children to brush their teeth more frequently:
- P/S made brushing teeth for children, which are "really disgusting", become much more interesting thanks to the fun experience while brushing and playing with AR camera.
- 21 fun characters were created to take turns to lead the adventure.
- 5 minutes before bed during 21 days, a lovely message from the chat bot would always appear on time to remind children to "pick up the brush and go" with "King Leo and friends"



Source: Brands Vietnam – "In order for the children to eagerly look forward to brushing time, what did P / S do?"

Channels that define Mobile Marketing/ Advertising

Loyalty Program

- A loyalty program is a rewards program offered by a company to customers who frequently make purchases in this case purchased on the mobile app. A loyalty program may give a customer advanced access to new products, special sales coupons or free merchandise.

Benefits

- Brand love: Caters to loyal users who want to be a part of the brand platform
- Stickiness: Increases repeat usage with engaging content and useful info
- Gold class: Increase customer loyalty and future sales, helps in up-selling
- VIP feel good: No problems of carrying cards and coupons they are present in your app virtually

Limitations

- Notional value: Many coupons are available only if you make a bigger purchase, the consumer may feel cheated and hence uninstall your app

VPBank CommCredit – Enhance connection, Deliver efficiency



- CommCredit Zalo OA as the main channel to connect and take care of their customer. Besides, by applying the latest innovations such as hyper-targeting Ads & CRM Integration, CommCredit aims to send personalized content to maximize customer service experiences.
- Results:
 - 310% ROI
 - 70K+ followers on CommCredit Zalo OA
 - Saving 30% Operating Costs



Channels that define Mobile Marketing/ Advertising

Location based

- In Location targeting section, you can select the name of one or more countries, states, provinces, cities, congressional districts, zip codes (US only) or post codes (internationally) to show your ads to people in those locations. You can also choose a radius within which the ads should be displayed

Benefits

- Sharp targeting: Targets the customer when near the store helps increase customer's intention of a buy
- Share of competition: Marketers can target their competition's locations and try and get their customers as well
- Here i am: Improves your businesses search results as well

Limitations

- Limited reach: Area to which you can target your consumers is restricted
- Data usage: Needs strong mobile data to use maps
- Limited market landscape: Not vastly available everywhere

How Philips reached premium audience in Vietnam

Background

Philips wanted to create greater awareness and drive consideration for premium products. The core target audience was young Vietnamese families in upscale apartment buildings.



The team mapped-out major residential districts in Ho Chi Minh City and Hanoi, identified apartment buildings within each district and graded every building based upon the facilities it offered. 'Grade-A' buildings were tagged and polygons were built around them.

The team then overlaid this geographic data with Inmobi's Audience Data to identify those audiences that matched the core target. Each time a core user was seen within the custom virtual geofence, a Philips ad was delivered within apps on their device.

Results:

- Reached 80% of premium audiences in 120 grade-A buildings in Ho Chi Minh City and Hanoi
- Users spent 48 seconds on the ad unit
- 88% of users agreed on the 'brand for me' dimension
- 65% of users were more favorably aligned to the brand

Channels that define Mobile Marketing/ Advertising

Livestream

Livestream lets brands present their events, performances and gatherings on an interactive online platform. Viewers can watch from a phone, computer or connected TV. Reactions, shares, comments, and other interactive features enable brands to engage with their audience.

Benefits

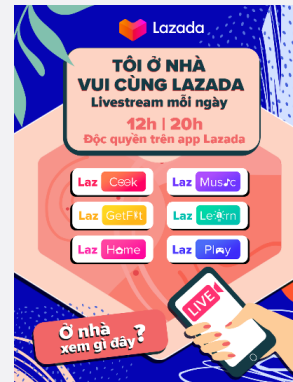
- Shared experience & participation
- Deliver more polished experience, VOD content for additional views/distribution, or promotional/media strategy is integral to distribution
- Create more “authentic or in-the-home feel”, interactive features (Q&A stickers, minigame etc)

Limitations

- Occasional technical issues such as lagging, blurry videos, slow transmission etc. that impact on audience’s experience
- Risks of receiving negative feedback instantly

Lazada - Livestream to facilitate Shopertainment

During Covid-19 pandemic, Lazada embarked on the campaign “Peace of mind at home shopping”. Lazada did not arrange many live streaming schedules in a day, but spans on weekdays with many topics. Each topic has a hashtag, which makes it easy for viewers to follow and find their favorite content such as: LazCook, LazMusic, LazGetfit, LazLearn, LazHome, LazPlay. The most prominent activities such as cooking tutorials, organizing online concerts with music stars, creative games for families and children ...



Mobile ecosystem in Vietnam

Currently the landscape is divided into three major clusters, which at times overlap and supplement each other

- **The client facing industry** primarily consists of agencies and their technology partners. They focus on delivering the Best KPI on advertising spends of brands.
- **The ad-tech industry** majorly consists of the two type of players, the one that work on top of operator delivery pipes – SMS, IVR and OBDs and the segment that relies on mobile internet connections to reach out to publishers.
- **The last mile connectors** are the ones which are used by end users for accessing any of the digital content or services.

Definitions of the terms used in the Mobile Scape

- **Media Agencies** – An agency works with brand owners to identify a brand's position, messaging and creative communication.
- **DSPs** – Demand Side Platforms which focus on buying media for clients with an aim to increase the return on spends. They generally comprised of a manual trading desk as well as a programmatic buying channel called real time bidding platform.
- **Ad networks** – Advertising networks were the purest form of networks, where a single network would interact on both sides the brands and publishers and would then match the demand to supply. The DSP, SSP and trading desks are the evolved versions of the ad-networks.
- **Exchanges** – Exchanges are the platforms which are connected to several DSPs and SSPs. They are generally used for increasing the reach on either the demand or supply side.
- **DMPs** – Data Management Platforms are platforms that aggregate user level data and help DSPs as well as SSPs in making bid level decisions of pricing, bidding, bid winning probabilities as well as the conversion probabilities at each impression level.
- **SSPs** – Supply side platforms are the counter parts of the DSPs. They are the media selling platforms, with a focus on increasing the publisher revenue. They generally comprised of a manual trading desk as well as a programmatic selling channel called real time auction platforms.
- **Social Media and Instant Messaging platforms** – a dedicated website or other application which enables users to communicate with each other by posting information, comments, messages, images, etc.
- **Content Aggregators:** A content aggregator is an app or a web service that gathers content from different sources for reuse or re-monetization.



Mobile ecosystem in Vietnam

Definitions of the terms used in the Mobile Scape

- **Mobile Gaming** – A video game played on mobile phone, tablet or portable media player
- **Mobile Browsers** – A mobile browser is a web browser designed for use on a mobile device such as a mobile phone or PDA. Mobile browsers are optimized so as to display Web content most effectively for small screens on portable devices.
- **Rich media platforms** – they are the creative suits required to create, host and manage the delivery of the specialized ad units. The rich media ad units allow a user to interact with the elements of the creative.
- **Location Tech** – ad technology platforms used for enriching the targeting and decision making part of the ad serving using location data of the users.
- **Measurement and Analytics platforms** – Third party measurement and attribution platforms which act as an unbiased delivery measurement tools.
- **Carriers/ISPs** – Wireless communication service providers which owns or controls all elements necessary to sell and deliver services to the end user.
- **Devices** – Manufacturers or marketers of portable computing devices like smartphones and tablets.
- **Operating System** – Software specifically designed to run on mobile devices such as mobile phones, smartphones, tablets.
- **App Stores** – Digital distribution platform for mobile apps.





Reach of mobile among consumers in Vietnam

- Mobile population growth overtime
- Phone ownership
- Mobile connection type
- Online activities by mobile phone



Internet Penetration in Vietnam

The number of internet users in Vietnam has increased by 10% during the period 2019 – 2020, which is even higher than the growth rate of total population (0.9%). On average, Vietnamese people spend 6 hours and a half on internet every day. These data prospects Vietnamese internet landscape as a fertile playground for digital marketers to engage with audience.

Total Population



96.90 million

Urbanization
36%



+ 896 thousands

Jan 2020 vs Jan 2019
+ 0.9%

Internet User



68.17 million

Penetration
70%



+ 6.2 million

Jan 2020 vs Jan 2019
+ 10%



Average daily time spent using
Internet of any device by each
Internet User
6h 30m



Mobile Connection Type & Internet Speed

More than half of Vietnamese internet population (53%) have used mobile connection via broadband (3G – 5G) with high speed, which indicates their high level of convenience and accessibility to digital platforms and content. It is a good signal for digital marketers to come up with various online advertising solutions across locations and time frames to engage with audience.



145.8 million

Number of mobile connections (exclude IOT)



89%

Percentage of mobile connection that are pre-paid



11%

Percentage of mobile connection that are post paid



53%

Number of mobile connections that are broadband (3G – 5G)



30.39 MBPS

Average speed of mobile internet connection



+41%

Year-on-year change in average speed of mobile internet connections



43.26 MBPS

Average speed of fixed internet connections



+59%

Year-on-year change in average speed of fixed internet connections



Device Ownership

Smart Phone is the most popular mobile device in Vietnam with 93% penetration, playing key role as prevailing mobile-connection platforms. Besides, big-screen devices, including laptop/ desktop or tablet, also occupies quite significant part in Vietnamese usage repertoire.



94%

Mobile phone
(any type)



93%

Smart phone



22%

Non- Smart phone



65%

Laptop or desktop
computer



32%

Tablet devices



9.6%

Device for streaming
TV content over the
internet



6.9%

Game Console



13%

Smart Home device



18%

Smart watch or
wristband



3.1%

Virtual reality
device



Phone Ownership by Demographic

Age	Total	Pop Million	Mobile Penetration	Users
16-19	8%	5.76	80%	4.61
20-29	26%	18.72	95%	17.78
30-39	23%	16.56	95%	15.73
40-49	18%	12.96	90%	11.66
50-59	14%	10.08	65%	6.55
60 plus	11%	7.92	30%	2.37
Total	100%	72,000,000		58.7

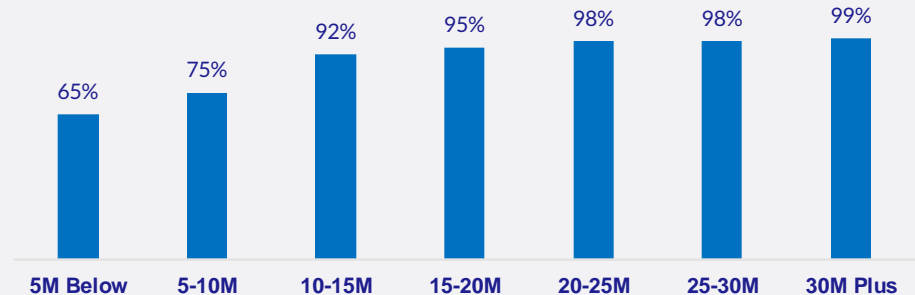
Source: "IFM Mobile report for Google" - Infocus Mekong Vietnam (2020)

Phone Penetration by Demographic

Smart phone ownership is ubiquitous, Income has no real impact nor does Location. The only variable is Age, which indicates the levels of being tech savvy. Once over 50 years of age, smart phone usage drops significantly.

Location	Mobile Ownership
Metro Urban 1 Million Plus Population	90 – 95%
Secondary Cities (350,000 to 800,000) Population	85 – 90%
Rural	75 – 85%

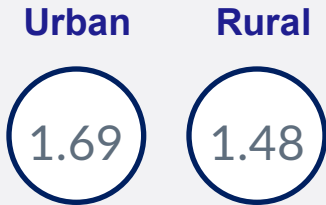
Penetration by Income



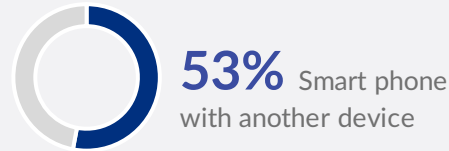
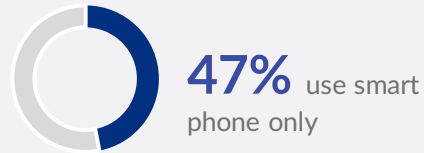
Online Devices in Vietnam

With higher number of devices owning, urban consumers tend to use dual devices rather than use smart phone only.

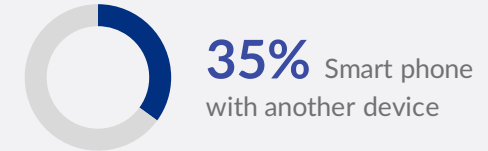
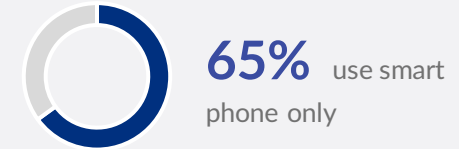
Number of Device Online



Urban

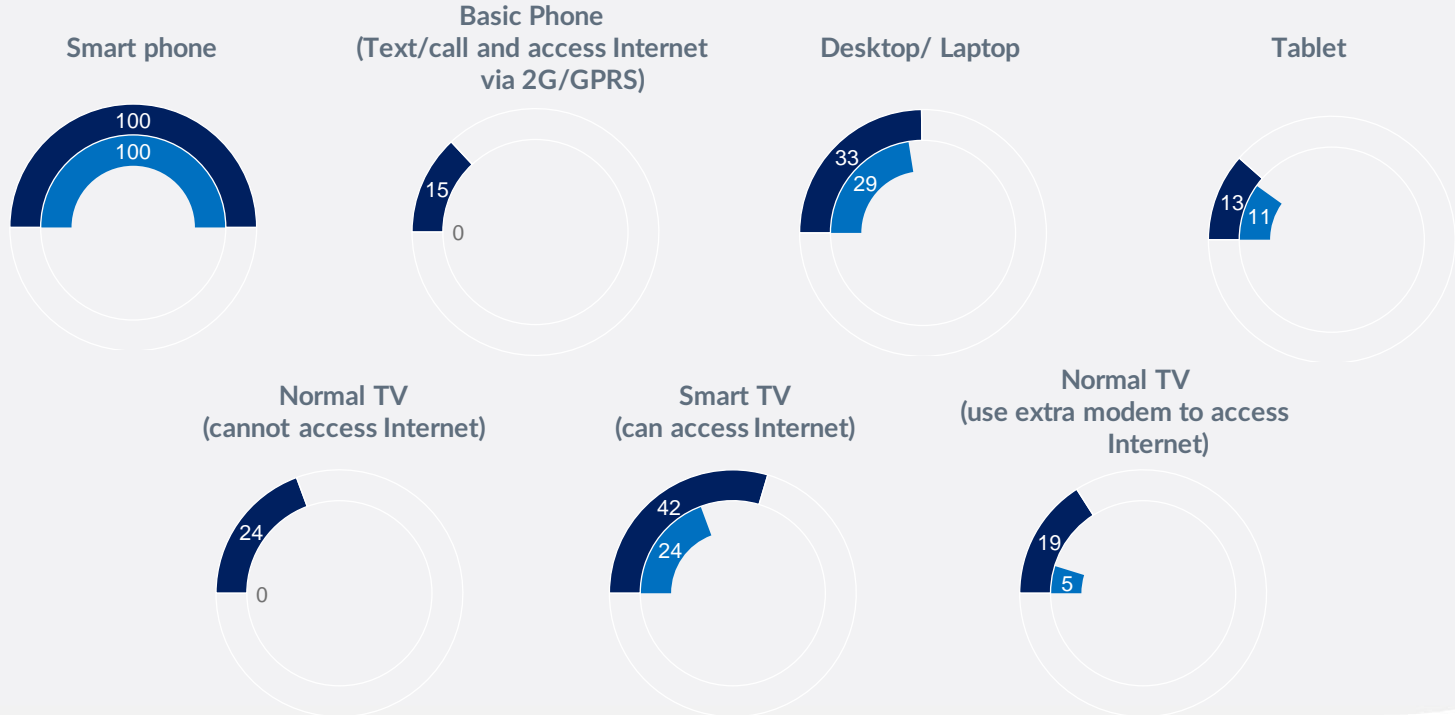


Rural



Online Devices in Urban Vietnam

Smart phone is the most popular device to access to the Internet in Urban, followed by desktop/laptop and smart TV.



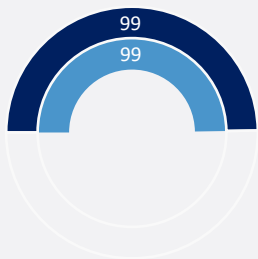
Currently owned

Used to access Internet

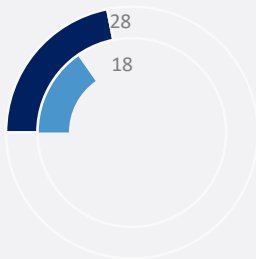
Online Devices in Rural Vietnam

Similar to Urban, Smart phone is the most popular device to access to the Internet in Rural. However, the other devices in Rural have significantly lower usage rate compared with smart phone due to limited affordability of rural audience.

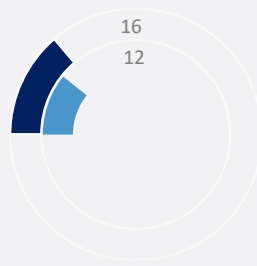
Smart phone



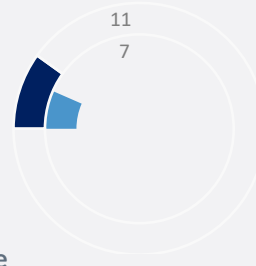
Smart TV (can access Internet)



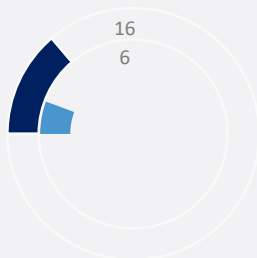
Laptop



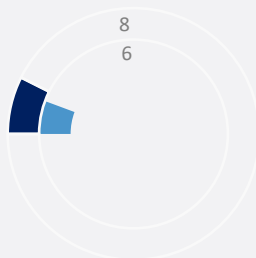
Desktop



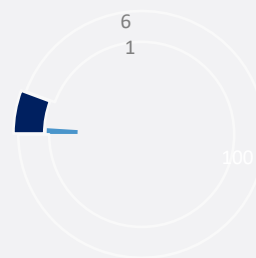
Normal TV (cannot access Internet)



Tablet



Basic Phone (Text/call and access Internet via 2G/GPRS)



Currently owned

Used to access Internet



Online Rural households are more valuable than offline households

Online Rural Households

HW Age: <49yo (71%)
HH size: 4+ members (64%)
Income: >4.5m (64%)

76%

Fridge

32%

Washing
Machine

16%

Laptop

67%

Smartphone

FMCG spent / month: 850K VND

FMCG growth: ~8%

Offline Rural Households

HW Age: <49yo (50%)
HH size: 3- members (60%)
Income: >4.5m (36%)

58%

Fridge

16%

Washing
Machine

2%

Laptop

16%

Smartphone

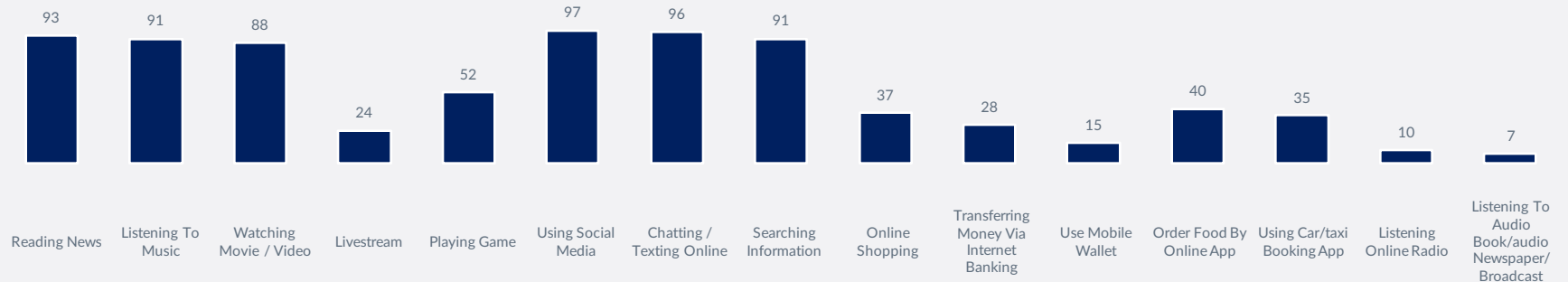
FMCG spent / month: 625K VND

FMCG growth: ~4%

Online Activities in Urban

Chatting/texting online, using social media and reading news are the most popular activities did in Urban with highest frequency a day. Beside that, other activities via booking & shopping app such as Ordering Food, Using Car/ Taxi, Shopping also account for quite significant part.

Activities did in P1M on any devices & frequency (%)



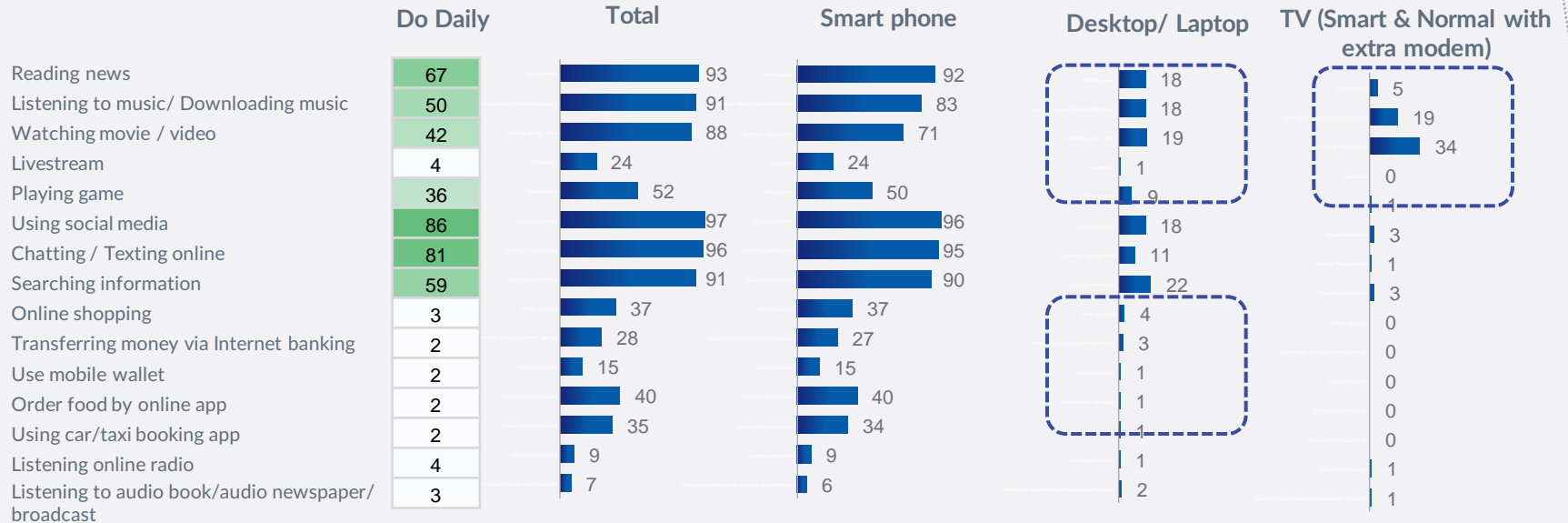
Source: Adtima Audience Pulse – “Adtima – Kantar Urban Connected Moment study” (2019 – 2020)



Online Activities by Devices in Urban

Urban residents tend to use smartphone for all online activities. Desktop/laptop is only used for searching information, reading news or watch movie while smart TV is used to watch movie and listen to music.

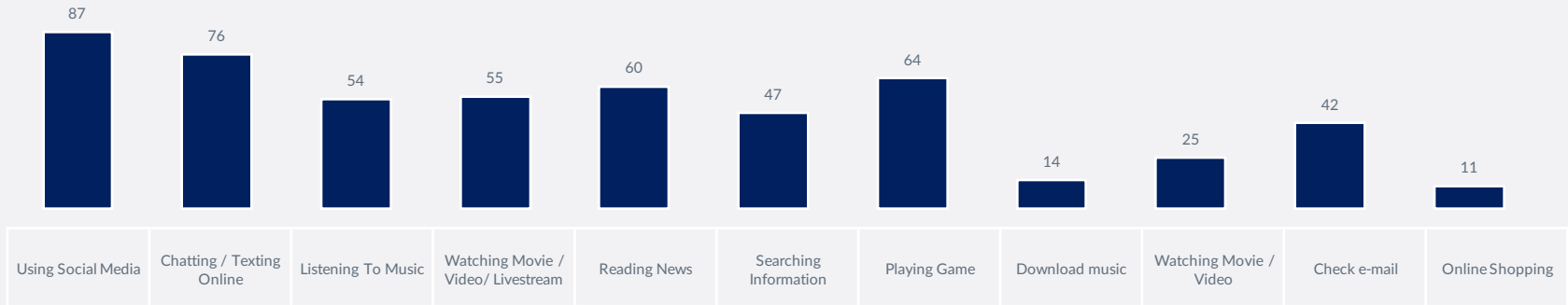
Activities did in P1M (%)



Online Activities in Rural

Using Social Media, Chatting/ Texting Online, Listening to Music, Playing Games are top four online activities conducted in Rural. Besides, Listening to Music and Watching Movies/ Videos are also very popular.

Activities did in P1M on any devices & frequency (%)

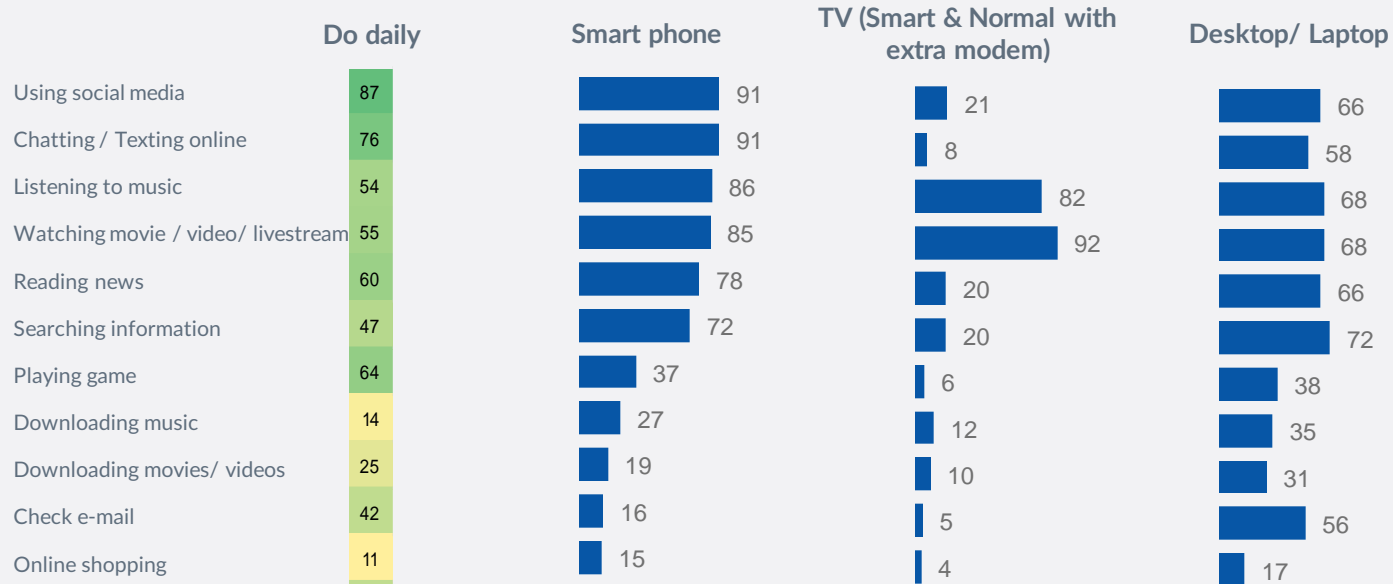


Source: Adtima Audience Pulse – “Adtima – Kantar Rural Media Landscape” (2019)

Online Activities by Devices in Rural

Smart Phone is the prominent device across multiple online activities. TV is more favored for music and video related activities.

Activities did in P1M (%)



Source: Adtima Audience Pulse – “Adtima – Kantar Rural Media Landscape” (2019)

Optimizing advertising creative for mobile

- Principles/ Tips for successful mobile creatives



Think Fast

Attract Attention Quickly

Get attention to video ads as quickly as possible.

Research by Facebook and Nielsen shows that up to 47% of value in a video campaign is given in the first 3 seconds, while up to 74% of value is given in the first 10 seconds.

Start with your most notable ingredients.

Hook people up with your most engaging content. Choose an eye-catching thumbnail for the video. Start with your awesome product photos and live wallpapers.

Highlight your "main character".

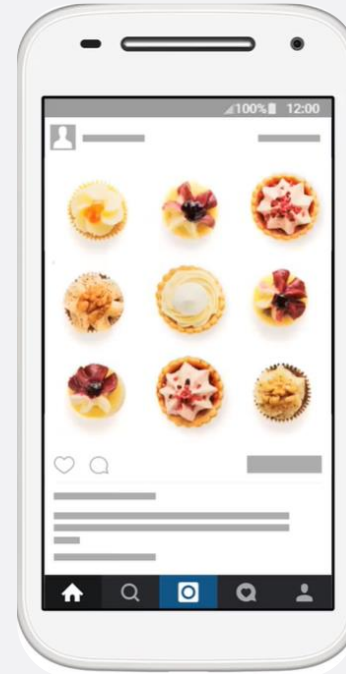
If you have a celebrity, a celebrity, or a favorite brand, let everyone know right away.

Incorporate brand attributes right from the start.

The branded ads and the first 10 seconds message can reach 3 times as effective as people.

Use compelling article content.

Add interesting, curious or surprising article content to complement your advertising.



Think Sound-off

Design for sound mute

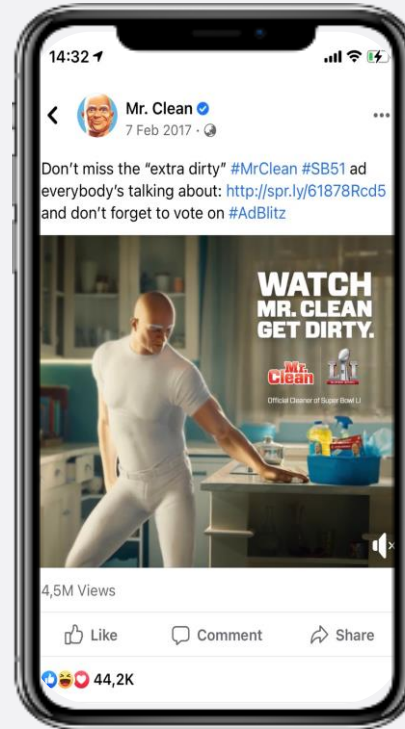
In a recent study, 76% of ranked video ads required sound to understand.

Tell stories with pictures.

Build a visual story so people can understand your message without sound.

Use text and graphics to help convey your message.

Communicate with text overlays, text, and graphics to tell the most important part of the story so people can read your message out loud and clearly. You can also try adding subtitles to the ad.



Frame pictures

Frame your stories with pictures

Screen sizes are getting smaller and smaller, so tell stories with pictures to help draw attention and articulate messages.

Explore the different frames.

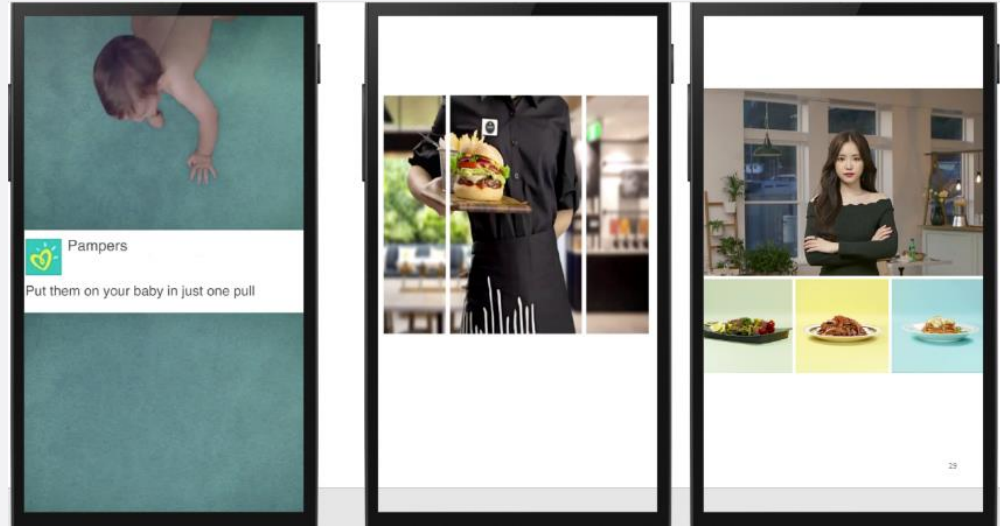
You can re-frame your videos into a square format to use more space on your mobile screen and draw more attention to your content.

Highlight the main ingredients.

Focus on keyframes that will grab your audience's attention and reinforce your message.

Create visual surprises.

Try playing with different dimensions or moving between the foreground and background of the scene.



Play More

Create unique experience to engage with audience

There is no optimal solution for mobile and it's important to find content that is right for your target audience.

Experiment to learn.

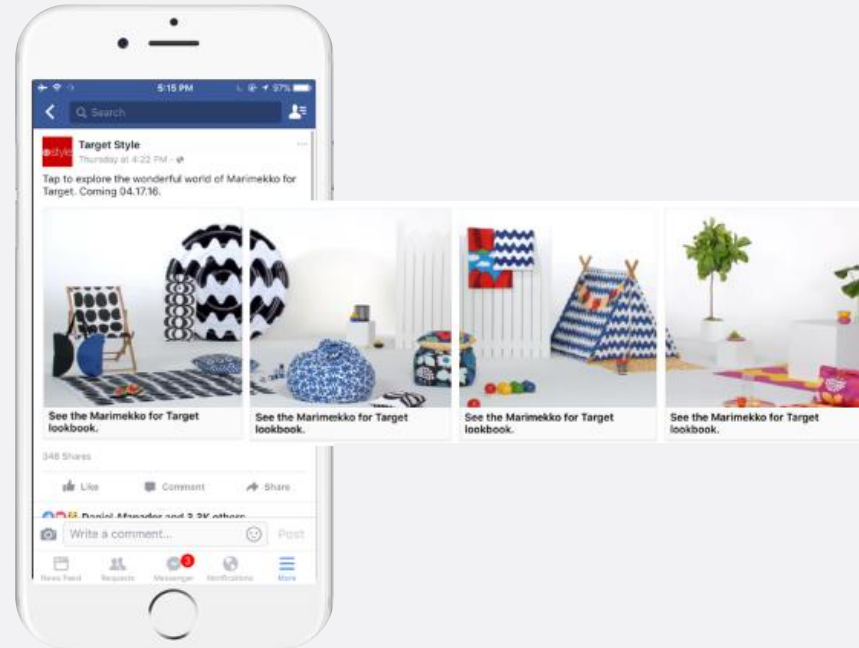
From different videos to new ways of copying, the amount of content you can test in your ad is almost limitless.

The video should be as short as possible and as long as necessary.

Attention is giveaway, so tell your story as quickly as possible while delivering your main message clearly.

Boundary expansion.

New types of video offer creative ways to get attention, like Facebook's Canvas, the first mobile ad unit that helps you create a fast, full-screen loading experience in News Feed.



And think Screen-Off

Audio platforms empower brands to reach people on occasions where visual media cannot, tapping right into user's activities like cooking, exercising, commuting to workplace, doing housework, relaxing and more.

Build a personal connection

Craft out a worthy experience with high moment-relevancy by considering all elements of interest, time, location, music genres & themes.

Keep your message clear & concise

Under 40 words, clear pronunciation with a consistent pace, tone and tempo, KISS (keep it short, and sweet)

Clear brand mentioned and RTB

Repeat product name multiple times with a clear reason to believe & including a VOICE OVER CTA.

Ear-catching music and sound effects - to catch attention and be reminded by playful, recalling sound effects to enhance brand love and brand recall.

Resonate with other brand messages

Incorporate with other media channels/ formats including display, video & audio ads to maximize synergy & brand impact.



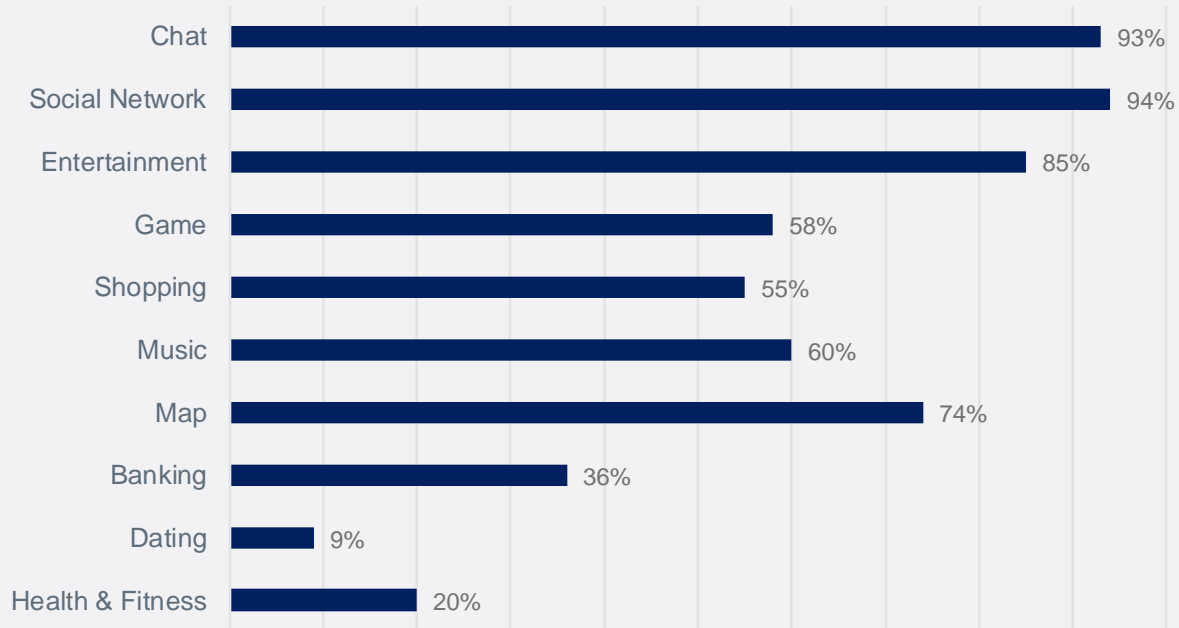
Mobile App Ecosystem in Vietnam

- Top downloaded/ used apps by each category (e.g. social network, e-commerce, music, video...)
- User behavior, time spent, usage frequency



Usage of Mobile Apps by Category

Online Chatting, Using Social Network, Entertainment and Map apps are top three mostly used mobile apps.



Source: "Mobile App Ecosystem in Vietnam" – Coccoc (2020)

Mobile App Rankings: Active Users & Downloads

Ranking of top mobile apps by average monthly active users throughout 2019

#	App Name	Company
01	Facebook	Facebook
02	Facebook Messenger	Facebook
03	Zalo	VNG
04	Zing MP3	VNG
05	Grab	Grab
06	Viber	Rakuten
07	VTC Now	VTC
08	Shopee	SEA
09	Instagram	Facebook
10	Lazada	Alibaba Group

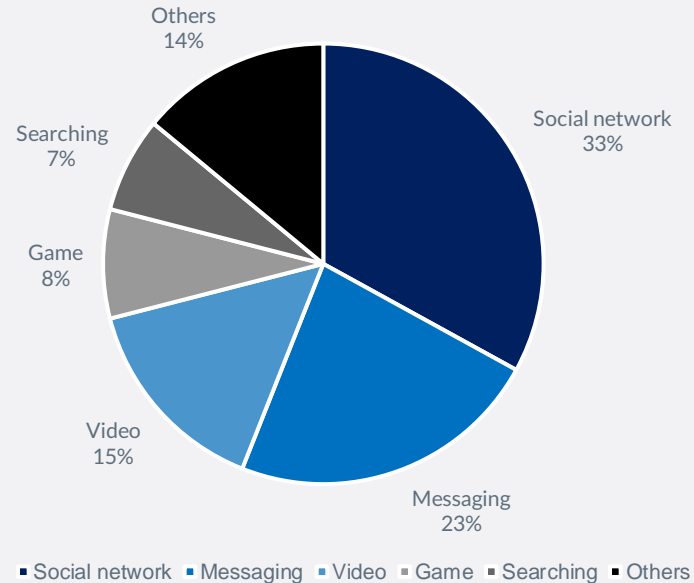
Ranking of top mobile apps by number of downloads throughout 2019

#	App Name	Company
01	Facebook Messenger	Facebook
02	Facebook	Facebook
03	Tiktok	Bytedance
04	Zalo	VNG
05	Zing MP3	VNG
06	Shopee	SEA
07	ULIKE	Bytedance
08	Hago	YY Inc
09	B612	Naver
10	Tiki.vn	TIKI

Source: "Mobile App Ecosystem in Vietnam" – Coccoc (2020)

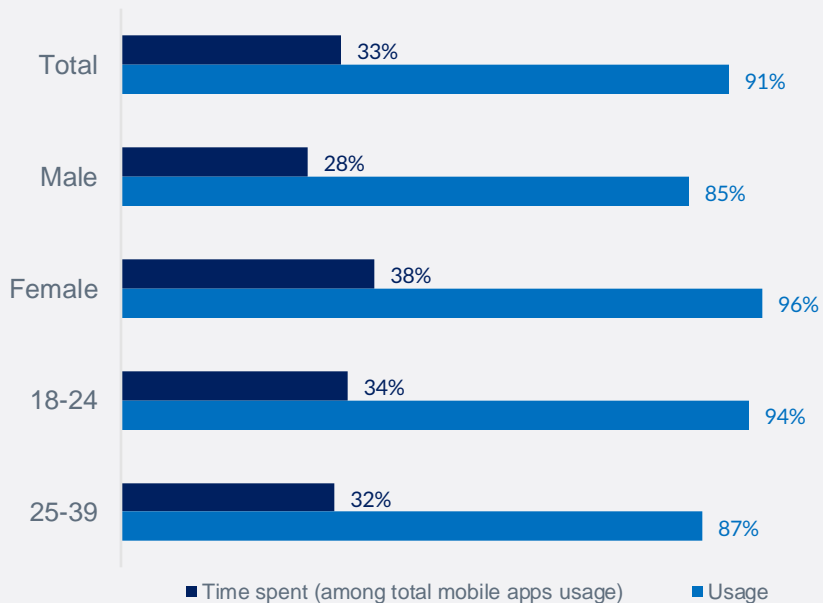
Time Spent among mobile apps

Social Network and Messaging are top two mobile apps that occupy for most of daily time of Vietnamese audience. Video app comes as the third place that occupies for 15% of their daily time.



Social Network

Usage by Demographic Profile



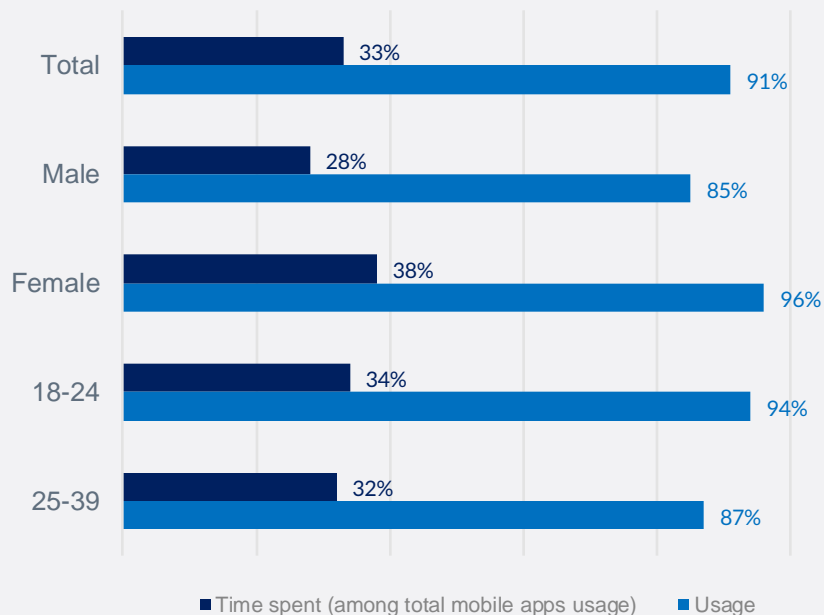
#	App	Usage
1	Facebook	89.8%
2	Instagram	29.6%
3	Twitter	2.8%
4	Facebook Page	2.8%
5	Tinder	0.9%



Source: "Mobile App Ecosystem in Vietnam" – Coccoc (2020)

Messaging

Usage by Demographic Profile



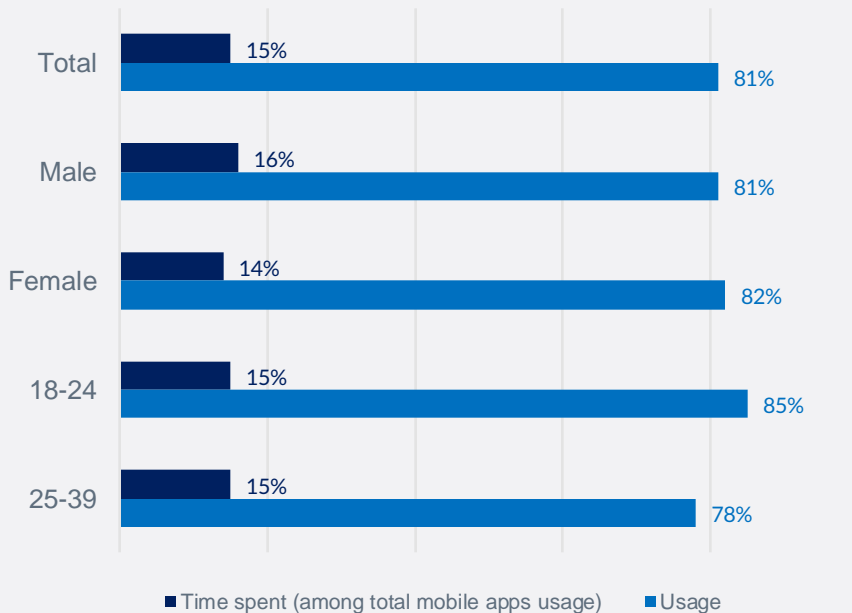
#	App	Usage
1	Messenger	88%
2	Zalo	79.6%
3	Viber	16.7%
4	Skype	15.7%



Video

Social network mobile app is used by 91% of users and occupies for 33% of the time. Top apps by usage is Facebook, followed by Instagram, Twitter.

Usage by Demographic Profile

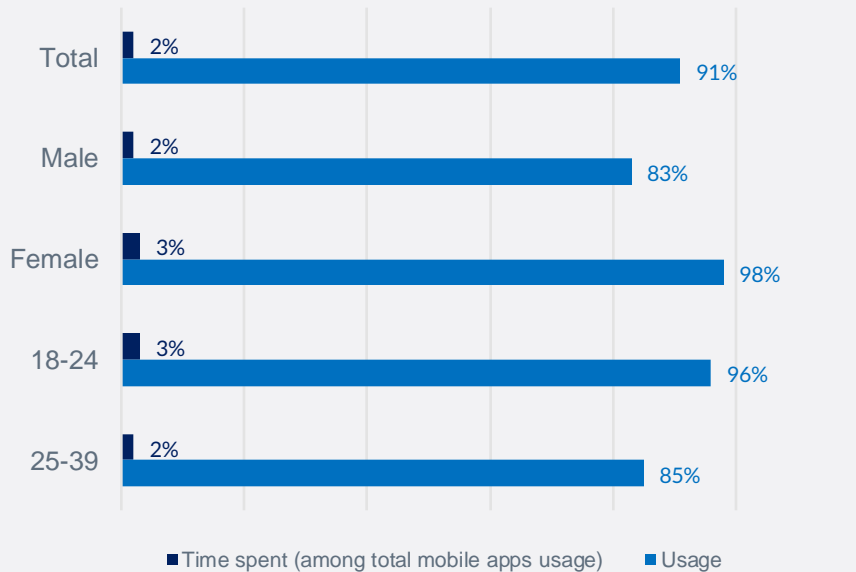


#	App	Usage
1	Youtube	80.6%
2	Tiktok	17.6%
3	BIGO Live	0.9%
4	Vlive	0.9%

Source: "Mobile App Ecosystem in Vietnam" – Coccoc (2020)

Photo

Usage by Demographic Profile



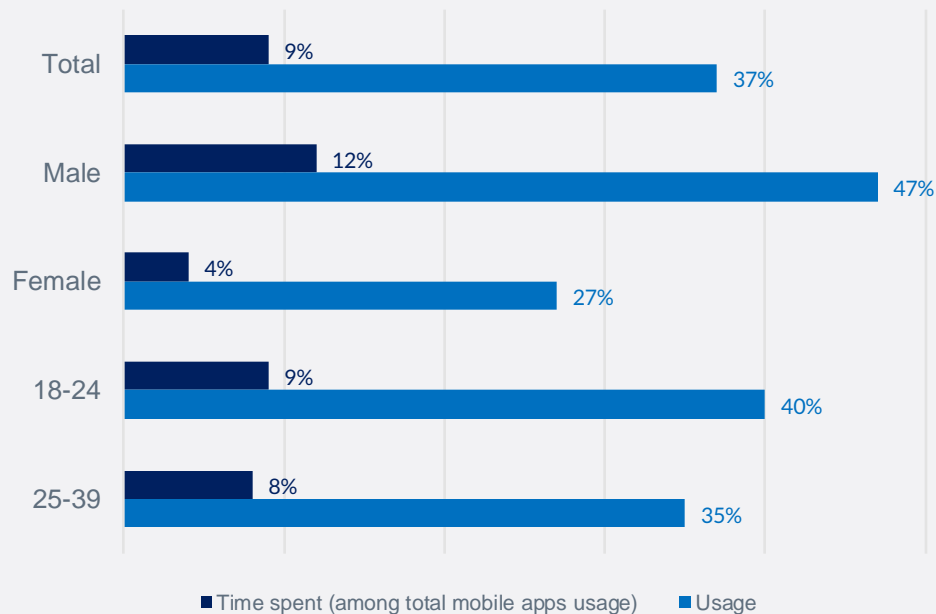
#	App	Usage
1	Photos	78.7%
2	Camera	78.7%
3	Foodie	7.4%
4	Ulike	6.5%
5	Snow	6.5%



Source: "Mobile App Ecosystem in Vietnam" – Coccoc (2020)

Game

Usage by Demographic Profile

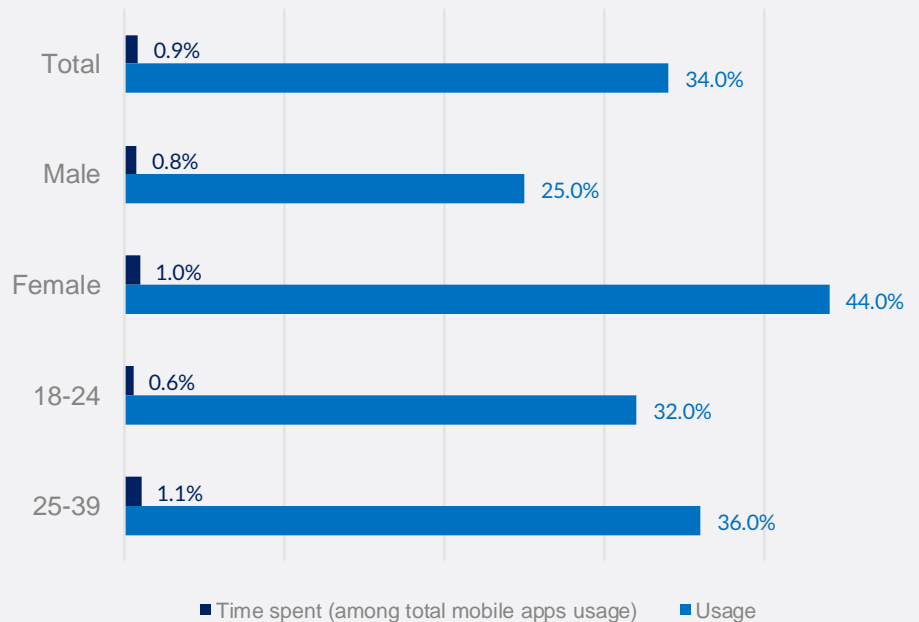


#	App	Usage
1	Ganera Liên Quân	11.1%
2	PUBG Mobile VN	9.3%
3	Candy Crush Saga	7.4%
4	Garena Free Fire	2.8%
5	My Talking Tom	1.9%



Shopping

Usage by Demographic Profile



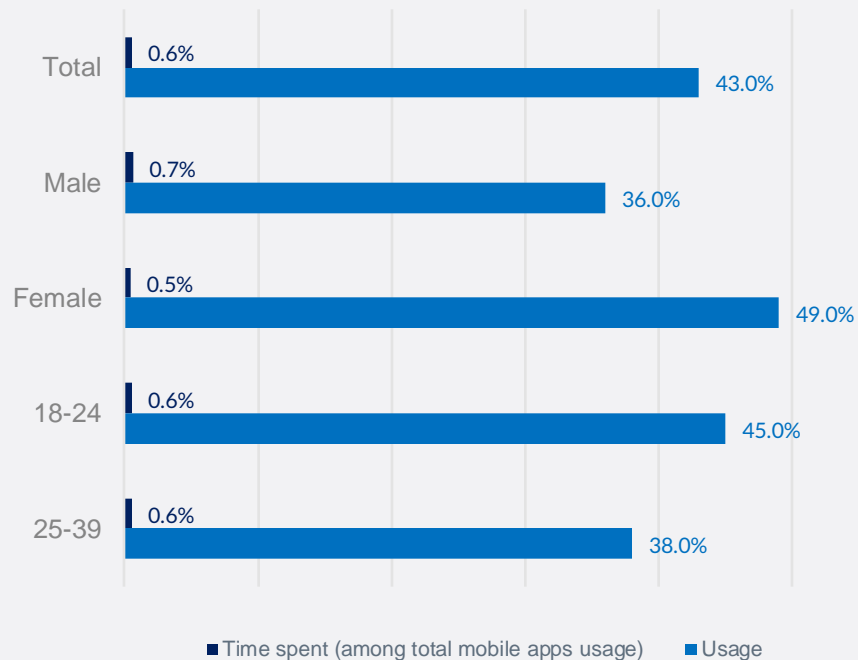
#	App	Usage
1	Shopee	21.3%
2	Tiki	10.2%
3	Sendo	6.5%
4	Lazada	4.6%
5	Chợ Tốt	0.9%



Source: "Mobile App Ecosystem in Vietnam" - Coccoc (2020)

Rideshare & Food Delivery

Usage by Demographic Profile



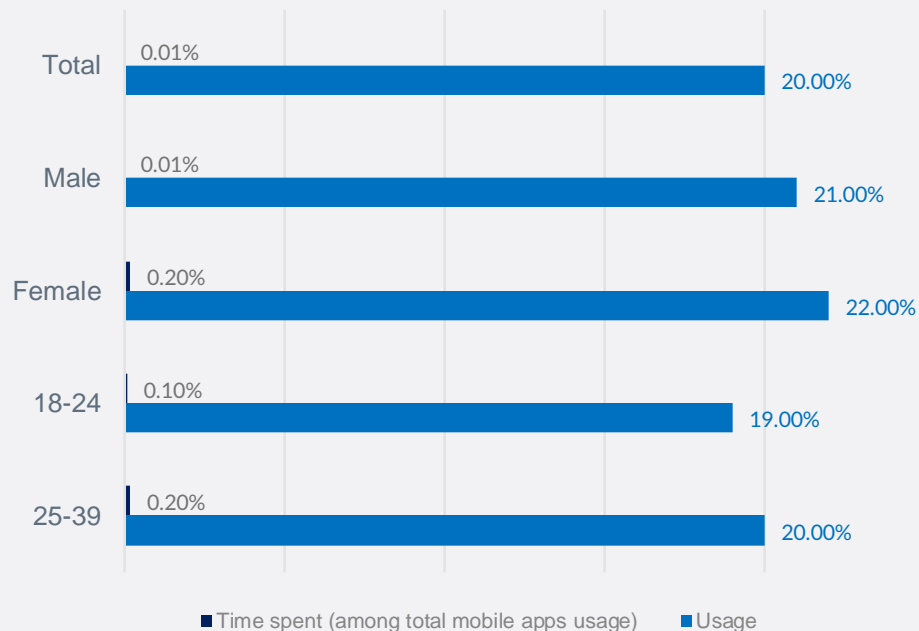
#	App	Usage
No.1	Grab	29.6%
No.2	GO-VIET	13.0%
No.3	Be	5.6%
No.4	Now	5.6%
No.5	Baemin	5.6%



Source: "Mobile App Ecosystem in Vietnam" – Coccoc (2020)

Mobile Payment

Usage by Demographic Profile



#	App	Usage
1	Vietcombank	9.3%
2	MoMo	7.4%
3	ZaloPay	2.8%
4	BIDV Smart banking	1.9%
5	Air Pay	1.9%



PART 2

MOBILE MARKETING TRENDS

VR



AR





Tram Nguyen
Country Director
Vietnam/Laos/Cambodia
Google

Thanks to Vietnam's efforts for universal smartphone access (including in rural areas), 5G coverage and low cost access to data nationwide, more people are going online through mobile devices than ever before. More than 90% of Vietnam's internet users connect to the Internet primarily through their mobile phones. As a result, consumers are learning to stay informed and updated with the latest trends and information thanks to the Internet. Consumers turn to Google to research in order to make informed decisions. They go to YouTube to be inspired and entertained. Consumers have increasingly complex digital journeys and heightened consumer expectations of brands and businesses to be there and helpful. Marketers face the challenge of clearly understanding what matters most to consumers in their moments of needs. At Google, we help brands leverage Mobile Marketing to meet their customers at the right time, right place with the right relevant information.



Tam Bich
Vietnam Country Manager
MMA

This report is one of the most crucial parts for MMA this year. With the help of many partners, we believe that these number are worthy data that can act as an important role in helping marketers and agencies in the ecosystem to refer and make their next big decision in their marketing strategy.



Artificial Intelligence Applied to Mobile Marketing



Artificial Intelligence Applied to Mobile Marketing

- In a rising speed, Artificial Intelligence (AI) will impact, each time more strategically, its applications in sales, CRM and marketing.
- The main benefits from the adoption of AI includes a more cohesive feedback between consumer and brand, implementing adequate attribution models, ensuring that marketing has been reaching the established goals and providing in-depth data-based insights. Advanced Machine Learning techniques are being developed, enabling systems to analyze big chunks of data and group similar ones, something that opens room for learning even when data is scarce.
- Mobile will play a central role, for the simple fact that it is the easier way to get customer feedback. Chatbots make both life and data collection simpler, but the combination of mobile data and AI also allow for a “silent” feedback collection: did the campaign help create an action, such as the user’s visit to a store, or was it completely ignored?

Clear Men Beer – Say Cheers!

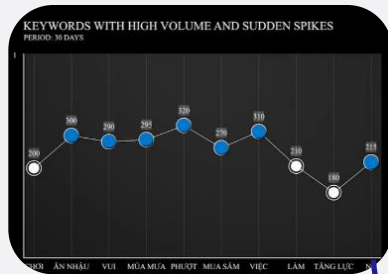
Clear Men created the innovative variant “Clear Men Beer”. The marketing team understands that audience have beer when they say cheers, and they decided to focus on cheers moment hijack to create awareness for this new “Clear Men Beer”. Their strategy was to define and capitalize on moments related to drinking beer. They even desired to go one step ahead by forecasting when Vietnamese audience were about to say cheers by leveraging AI Predictive Modelling.



Artificial Intelligence Applied to Mobile Marketing

Step 1: Identify & Generate “Cheers Moments” via AI

- Clear Men team cooperated with Grapeshot, using its advanced Predictive Modelling powered by AI to screen numerous articles and identify key words with high volume and sudden spikes. They used those key words as seeds to generate more potential trending key words after using machine-learning algorithms to analyze current trends.
- A custom “cheers moment” segment key words was created with new potential key words added to the master list every day and hijacked by contextual targeting in order to achieve 100% share of voice.



Artificial Intelligence Applied to Mobile Marketing

Step 2: Scale up by targeting at compassion moments

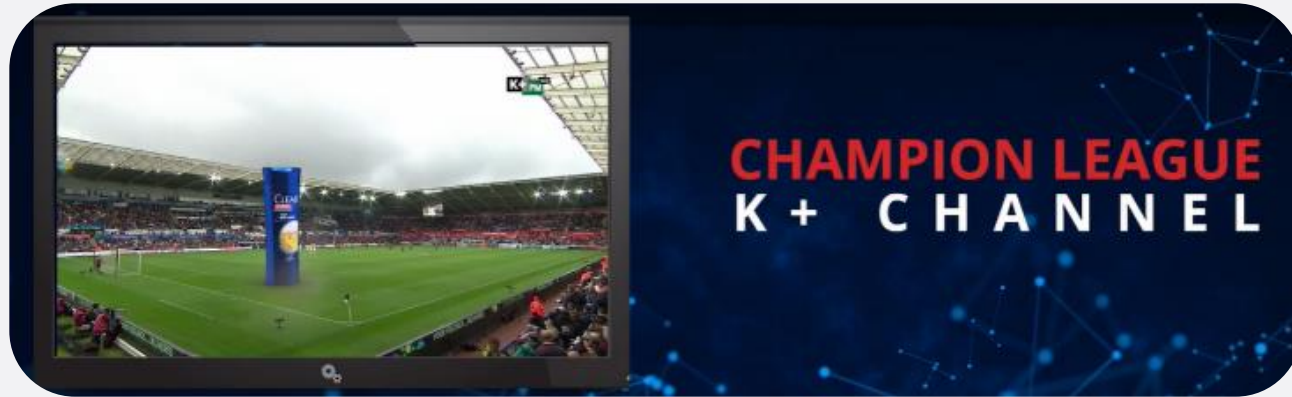
- To scale it up, the marketing team leveraged media signals based on Vietnamese men's compassion points to create four key moments: travel, sport, commuting, gaming. Each time audience come across those moments, Clear Men Beer would appear and cheer them with appropriate videos and messages.



Artificial Intelligence Applied to Mobile Marketing

Step 3: Own future “Cheer” events & moments

In addition to this, they forecasted popular upcoming events and partnered with local TV channel K+ as well as big e-sport leagues in Vietnam (“VCS League of Legend”) to hijack livestreaming about “cheers moments”.



Artificial Intelligence Applied to Mobile Marketing

Impressive Impacts

By hijacking not only current trending moments but also future “cheers” moments with AI powered, Clear Men was able to reduce 25% biddable spend with reach maintained. 10,000,000 Vietnamese men were reached. Search query volume increased by 70%. There are 176,000 engagements. Brand awareness increased by 6%. And four months after campaign run, Clear increase 2% market share

10M Vietnamese men
were reached

+70% Search
Query volume

+2% Market share

176K Engagemnets

25% Biddble media spend
reduce with reach maintained



The Power of Voice: Audio Advertising Explodes



The Power of Voice: Audio Advertising Explodes

- Audio bends around our lives, but that doesn't mean it's background noise. Those screen-free moments are frequently the most meaningful in our day. With music streaming and playlists in particular, we can match our every mood, mindset, and activity — our context — with exactly the right score.
- All of this is great news for advertisers looking to reach highly engaged audiences in an impactful way — audio's ubiquity allows you to fill otherwise unreachable gaps in the consumer's journey, while streaming's emotional quotient means we're receiving new signals about individuals' real-life context. Plus, a fun side effect: if we're listening on-the-go, we're likely not stopping to mute a 15-second ad, and we're certainly not walking away from the TV to cram in a chore during a commercial break.

Tea+ Oolong Lemon And ZingMp3

Targeting at young and active audiences, who favors outdoor activities and healthy products, Tea+ Olong Lemon launches the campaign “Thanh Mat Nhe Tenh” to enhance brand consideration via offering product's benefits. Coming up with attractive idea to target at young and active audience, Tea+ has launched campaign under media strategy called VAK - Visual, Audio, Kinesthetic on Zing MP3.



The Power of Voice: Audio Advertising Explodes

Situation

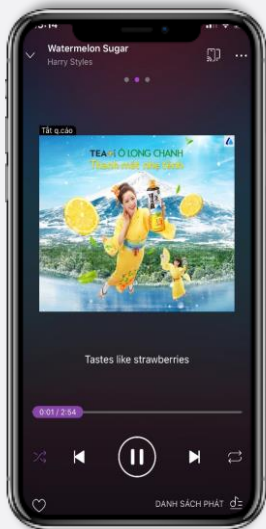
- 2019 is quite a year to Tea+ with the success of Tea+ Olong Lemon “Theo Anh Khong” campaign. However, this poses a challenge for Tea+ to keep up with previous achievement in 2020. In 2020, Tea+ Olong business objective is growing sales and market share in the North and Central of Vietnam. To achieve the business goal at these two areas, Tea+ has launched a campaign to increase brand consideration and drive more sales. With distinctive dryness and heat in the North and Central of Vietnam, outdoor activities during the summer are restricted although this is the most ideal time for such entertainment.

Action

- For Audio segment, Tea+ has chosen Zing MP3 to tap in screen-less moments of audience. Zing MP3 is considered as the leading music streaming platform, offers a wide variety of playlists for daily music moment. The campaign has its message delivered via an energetic summer theme on Zing MP3, over 4 solutions: Audio ads, Pre-play, Display ads, Summer-themed playlist with Tea+ tone & mood

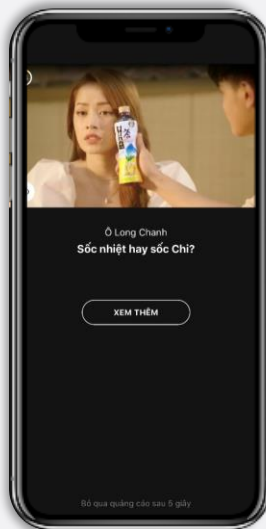


The Power of Voice: Audio Advertising Explodes



Audio Ads

Audio Ads plays the key role in campaign as it catch audiences' attention with lively melodies.



Pre-play and Display ads

Pre-play and Display ads with colorful visual contributed to increase brand awareness.



Sponsored Playlists

Tea+ creates a set of sponsored playlists with Summer theme to serve various music preferences



The Power of Voice: Audio Advertising Explodes

Impressive Impact

- The success is based on the collaboration between Tea+ and Zing MP3. This highlights the influence that music has on Vietnamese young generation and the its potential that brands can leverage.

Total Impression **x2,2 KPI**

Total Playlist listened **x1,7 KPI**

SALE
+ 226% VS TARGET

Penetration
+ 146% vs target

Total audio ads impression
x 1,9 KPI





VR/ AR and AI Promote Interactive Content



VR/ AR and AI Promote Interactive Content

- Virtual Reality (VR) and Augmented Reality (AR) already have all that is necessary to become massive technologies. Most new Android phones support the Virtual Reality Platform developed by Google, Daydream, so 74% of smartphone users are ready to access related content. Apple is also heavily investing in these technologies and has recently released ARKit, its Augmented Reality platform for iOS.
- Mobile will be, in the next few years, the imperative condition to get into the VR and AR universes. An important change in course is the evolution of “storytelling” to “storyliving” – the core of the magic offered by VR and AR. “They both have the potential to deliver ad messages in a much more powerful way than formats such as text, static images and traditional videos. The multi-sensorial communications help people see, hear, feel and identify better with other people’s experiences”, said Ignacio Zuccarino, head of creative at Google Zoo.

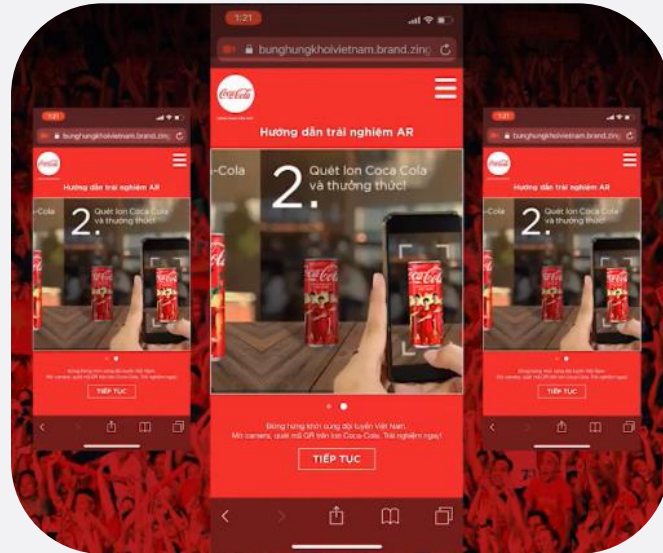
Coca-Cola Uplift Vietnam AR

- Football in Vietnam remains a source of great excitement, and also this is a passion point that many brands have been leveraged. How Coca-Cola’s communication can stand out from the clutter and provide a meaningful engagement with consumer. By leveraging Digital and Augment Reality technology, the brand is able to uplift the emotions of ordinary supporters in football moments through immersive experiences and bringing in personalization at the same time.



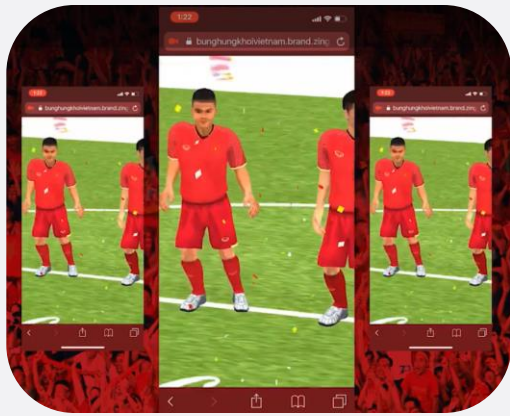
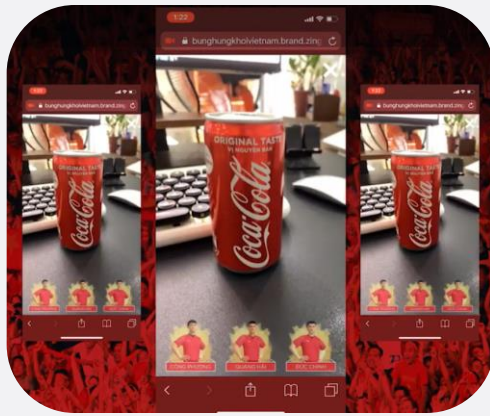
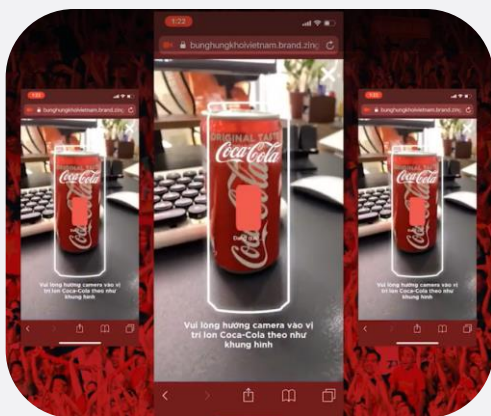
VR/ AR and AI Promote Interactive Content

Step 1: Create a series of limited edition cans with built-in immersive experience



VR/ AR and AI Promote Interactive Content

Step 2: Scan the PR code the witness Vietnam's to favorite footballer score and break into a signature Coca Cola "Jig dance" in AR



VR/ AR and AI Promote Interactive Content

Scans

8,000+

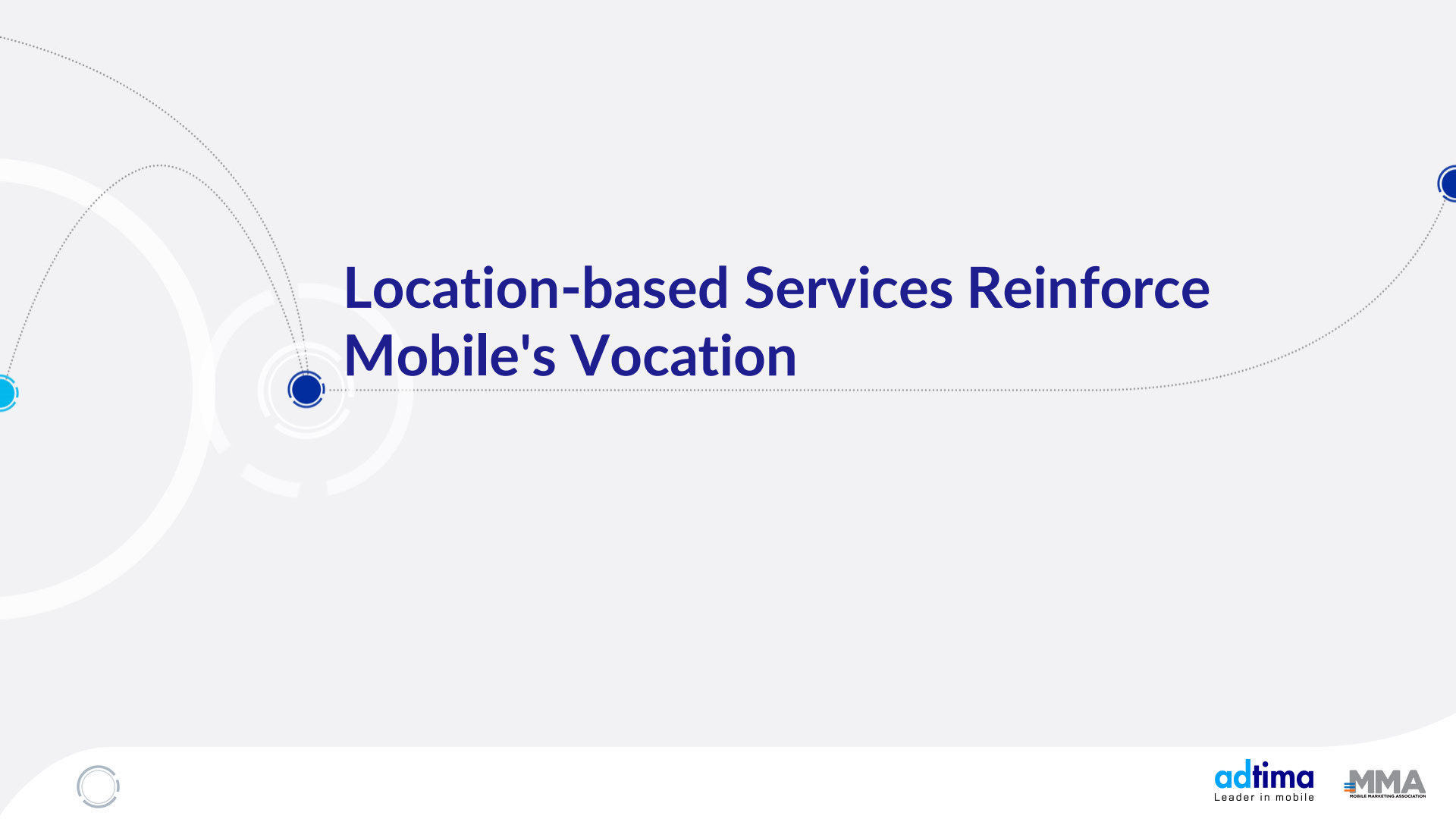
Brand love

+2 points

Avatar changes

3,500





Location-based Services Reinforce Mobile's Vocation



Location-based Services Reinforce Mobile's Vocation

- The explosion of mobile enabled the evolution of location-based marketing and placed it at the center of brand strategies. Many brands already exploit consistently the opportunities of geolocation and, moving forward, these applications should become more sophisticated.
- When it comes to marketing, there are several advantages geolocation-based data could empower, such as customizing products or services and getting to know consumer behavior in-depth, or finding non-invasive ways to talk to consumers. After building a relevant presence – when the brand approaches the user at the right time and place, serving in-context messages –, investments are optimized.
- In countries with a plural audience, such as Vietnam, mobile also enables the creation of a national and local communication strategy.

Infection Alert System - Lifebuoy

- A data-driven initiative enabling Lifebuoy to fulfill its mission to stay ahead of infections. A disease alert dashboard in collaboration with Google to send customized targeted alerts and health care tips to brand's audience in different provinces/cities of Vietnam, based on forecast of popular hygiene-related disease outbreaks.



Lifebuoy – Stay one step ahead of Infection

Situation

- Every year, there were around 1.8 millions of Vietnamese people suffering from seasonal diseases. Seasonal diseases such as hand-foot-mouth, diarrhea, H1N1 etc. had been getting more out of control. The problem was that firstly, public news was delivered only after the diseases had broken out. Secondly, moms still went for cues rather than prevention. So alerting them about the diseases in advance was significantly important. As a leading hygiene brand, Lifebuoy's mission was to help mom stay one step ahead of infection creating the "Infection Alert System".

Action

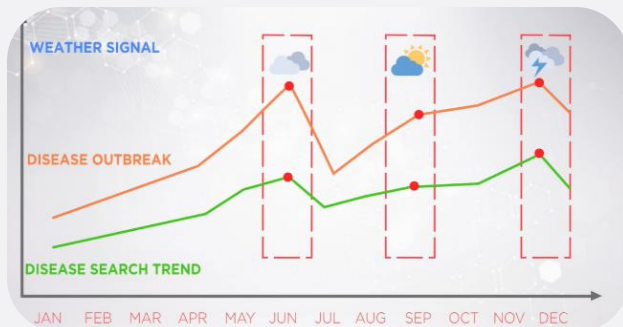
- Empowering the power of data and AI, Lifebuoy developed the automatic "Infection Alert System", which real-time and hyper-customized. It helped forecast potential diseases at right place and deliver right message to alert moms.



Lifebuoy – Stay one step ahead of Infection

Step 1: Identify the potential disease outbreak

- The first aim was to understand the correlation between weather signals, disease search trend and disease outbreak. Lifebuoy leveraged Google “Ruled by Weather” to create forecast about four types of disease by seasons, including Flu, Hand-foot-mouth, Dengue, Diarrhea. It allowed them to see which potential diseases are at city level and in real time.



Step 2: Deliver the relevant alert to Moms

- Lifebuoy created a set of master asset and hyper-customized it for 64 cities and provinces across Vietnam. Based on potential disease prediction in each city or province, their campaign status would turn “on” or “off” automatically and the customized creative asset would be delivered accordingly. Even when multiple diseases happened at the same time, moms could still receive the most relevant message for their regions.



Lifebuoy – Stay one step ahead of Infection

Step 3: Feed Moms the worm of knowledge

- Not stopping at the disease alert, Lifebuoys also build partnership with helloBACSI to provide moms with useful hygiene education so that they could learn about these diseases and ways how to prevent them.



Lifebuoy – Stay one step ahead of Infection

Impressive Impacts

- In just one month, 3.5 millions of moms were alerted about diseases and provided knowledge. Lifebuoy sales in each city or province increased significantly. When Ha Noi experienced the flu outbreak, Lifebuoys sales there increased by 18%. When Dong Nai experienced the hand-foot-mouth outbreak, Lifebuoys sales there uplifted by 29%. The campaign helped Lifebuoys sales grow by 20%, penetration increase by 100 bps in urban and 500 bps in rural. The “Infection Alert System” helped Lifebuoys become Vietnamese moms’ best assistant to predict and prevent diseases as well as fulfil its mission as protect Vietnamese health.

SALES
+18% IN HA NOI

SALES
+20% NATIONWIDE

SALES
**+29% IN DONG
NAI**

PENETRATION
+500bps in rural

PENETRATION
+100bps in urban





Bridge the online & offline (O2O) world for seamless consumers' experience

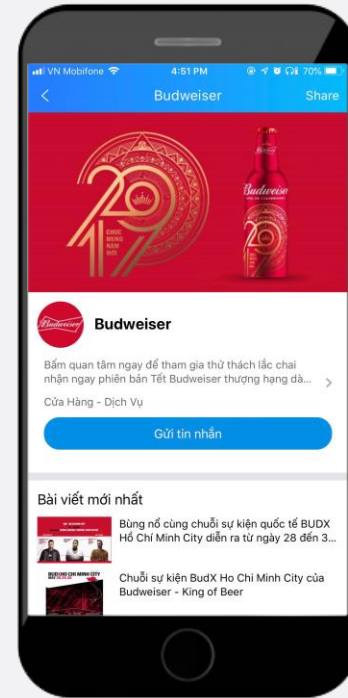


Bridge the O2O world for seamless consumers' experience

- Customer journey optimization always plays an important role in business to help brands bring out good experience for users as well as establish strong foundation for sustainable performance. With Southeast Asian consumers using their smartphones 3.7 hours per day, and 97% of commerce still occurring offline, Southeast Asian marketers are leveling up their abilities to design customer journeys that span consumers' online and offline worlds. However, in order to do that we first need to overcome the challenge of integrating multiple channels and devices into an online to offline (O2O) customer journey. New O2O capabilities in market are enabling brands to engage, serve and supply their consumers in new innovative ways.

Budweiser – Zalo OA campaign to drive activation engagements

- New year is the peak time that beverage and alcoholic brands make unique and interesting advertising campaigns to attract consumers' attention, thereby increasing sales. Budweiser also did stand out from the exciting playground of the industry during the 2019 Tet holiday with the campaign "Shake and win" to bring impressive results and attracted the attention of consumers. By building up mini game directly on Budweiser OA, they optimized game flow and stayed to remind audiences, drive them to offline transactions.



Bridge the O2O world for seamless consumers' experience

Integrated end-to-end services through the project



1. Maximize reach of in-target audience

Gyroscope for motion detecting engagement



2. Mobile interactive

Join game "shaking beer" to receive QR code for receiving beer gift



3. E-voucher redemption system

Data back-end for voucher issuance



4. Personalized communication

Deep segmentation for personalized messages



5. Exchange gift at suggested supermarket

Location services for convenience of redemption



Messaging as a Marketing Platform



Messaging as a Marketing Platform

- In an exponential growth curve, higher in developing markets, marketing based on instant messaging will finally become customized. “It is more interactive, people tend to see and respond messages in-app. It is common to interact on the platform with a salesman. As for SMS, it is not as user friendly, and e-mail is impersonal”, says Flaschi, sales director at Infobip Latin America.
- Brands should get to know their customer base better and then to segment its communications, in order to fight a possible rejection. Flaschi also recommended that “The future of messaging will be brands interacting not only to talk about price, but also to bring people relevant information, that they still need to search for today. Push will be on demand for the customer, because he does not want to be bothered with irrelevant messages. Crossing technologies with marketing intelligence will make room for this innovation”.

Leverage Zalo Official Account & Chatbot to become reliable partner of modern aquiculture

- The icon of "Anh Ba Chuẩn" was brought by Neovia Vietnam - a member of world's leading group in the field of animal nutrition and health. To help aquiculture learning about "Three Standard" models and get advice from experts everywhere & everytime, “Anh Ba Chuan” Zalo OA born. Beside supporting useful and reliable information from experts for aquiculture. Official Account is also a useful information channel between people and experts in fisheries sector, to create a good conditions for those who need a quick and timely answer.



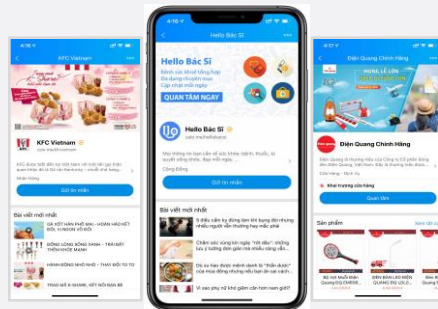
Messaging as a Marketing Platform

Zalo Official Account

Zalo Official Account (OA) is the two-way and personalized communication hub of individuals, businesses, communities and government with the aim of interacting, connecting, transmitting information to audience. OA is aimed at becoming the content hub for users where they can passively or actively update brand information.

- Zalo Official Account works as an opt-in model that requires users to follow a specific OA to receive messages. That is to protect users' privacy when they have active rights to choose which stakeholder to connect as well as to bring out the positive impact to business when brands can repeat exposure, advertise freely, personalize communication and build loyalty.
- With that strategic foundation, Zalo is a platform for both push & pull marketing application. That does not only allow advertisers to push contents to audiences but also builds up a communication hub for audience to proactively access such as chat with CS, update content, query information etc

Key features



Broadcast message/Notifications
Send message to target customers and preset timing

Customer services
Automatic and interactive communication platform with customers

Content creation
Create and store unlimited content in various formats (e.g. image, video etc.)



Messaging as a Marketing Platform

- With Adtima ecosystem, rural users can reach "Anh Ba Chuan" Zalo OA through Zalo ads (which target on rural users) with following functions



Zalo Ads



Zalo Official Account



Submenu



Chatbot



Broadcast message





Mobile retailing empowers big retailers to fulfil consumer needs



Mobile retailing empowers big retailers to fulfil consumer needs

- Mobile access to product information, discounts and more has dramatically shifted shopper behavior. With an affordable, easy-to-use mobile solution, retail marketers can create a seamless 'omnichannel' experience, which helps increase customer engagement and loyalty along with sales and revenues. In addition, retailers can capture meaningful data about in-store shoppers to further brand loyalty and revenue goals:

Big C – Create holistic on-apps and in-store experience for shoppers

- Big C – one of the largest retailer chain have noticed the mobile-commerce trend and under the pressure of Covid they also seeking for an effective solutions to capture consumer demand and achieve business results. Through mobile, Big C can deliver an instant online connection via their retail stores, printed catalogs, advertising, and other traditional points of sale



Mobile retailing empowers big retailers to fulfil consumer needs



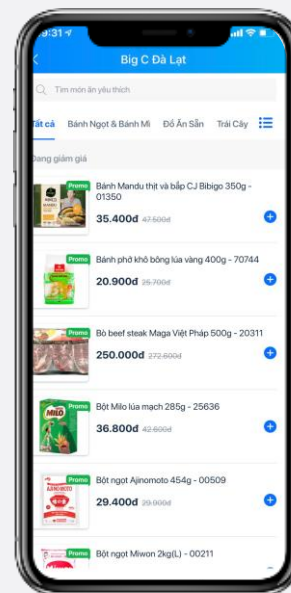
Open
Big C Zalo OA



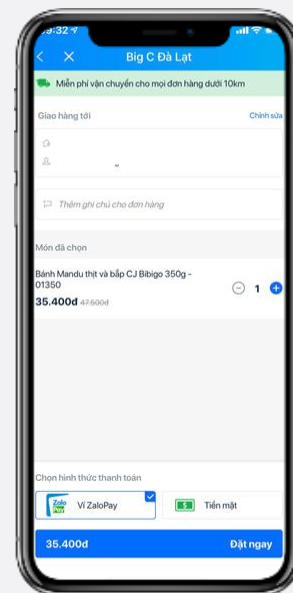
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THANK YOU!

