



The leading
performance marketing
agency in Asia

DIGITAL MARKETING LANDSCAPE 2018-2019

Presented by Vu Kim Oanh
Founder & CEO Omega Media Worldwide JSC





VIETNAM



OVERVIEW 2018



2018

- The world's total ads spend : **558 bil USD**
- Vietnam's Total ads spend : **2,98 bil USD**, increasement **2-3 times**
- Internet ads spend : **872 mil USD** equivalent of **29%** of total ads spend

Source by: Group M & TNS

DIGITAL IN VIETNAM



(*) Theo wearesocial

ANNUAL DIGITAL GROWTH



(*) Theo wearesocial

FREQUENCY OF INTERNET USE



(*) Theo wearesocial

SHARE OF WEB TRAFFIC BY DEVICE



(*) Theo wearesocial

SIMILARWEB'S RANKING OF TOP WEBSITES

| # | WEBSITE | CATEGORY | MONTHLY TRAFFIC | TIME PER VISIT | PAGES PER VISIT |
|----|---------------|--------------|-----------------|----------------|-----------------|
| 01 | GOOGLE.COM.VN | SEARCH | 375,300,000 | 12M 26S | 6.8 |
| 02 | FACEBOOK.COM | SOCIAL | 351,400,000 | 25M 04S | 21.7 |
| 03 | YOUTUBE.COM | TV & VIDEO | 329,900,000 | 27M 15S | 11.9 |
| 04 | GOOGLE.COM | SEARCH | 323,200,000 | 13M 24S | 15.3 |
| 05 | VNEXPRESS.NET | NEWS & MEDIA | 73,400,000 | 9M 07S | 4.2 |
| 06 | ZING.VN | SOCIAL | 61,900,000 | 14M 47S | 6.6 |
| 07 | YAHOO.COM | NEWS & MEDIA | 41,200,000 | 5M 49S | 4.6 |
| 08 | COCCOC.COM | SEARCH | 37,500,000 | 6M 54S | 2.6 |
| 09 | NEWS.ZING.VN | NEWS & MEDIA | 32,400,000 | 7M 11S | 3.6 |
| 10 | KENH14.VN | NEWS & MEDIA | 32,100,000 | 7M 31S | 4.8 |

(*) Theo wearesocial

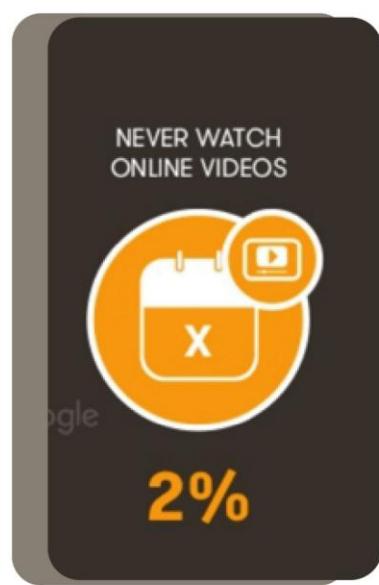
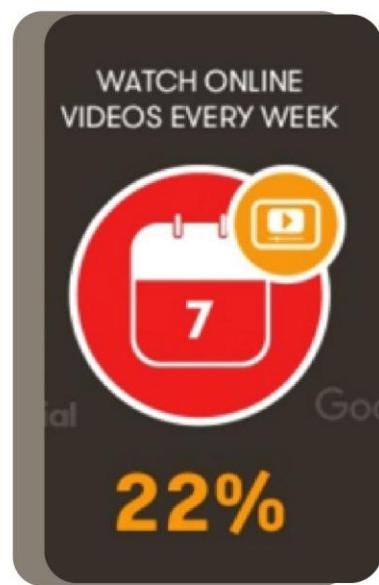
TOP GOOGLE SEARCH QUERIES IN 2017

| # | QUERY | INDEX |
|----|----------|-------|
| 01 | PHIM | 100 |
| 02 | FACEBOOK | 60 |
| 03 | BAO | 41 |
| 04 | XSMB | 37 |
| 05 | YOUTUBE | 32 |
| 06 | GOOGLE | 30 |
| 07 | BONG DA | 28 |
| 08 | NHAC | 25 |
| 09 | SO XO | 23 |
| 10 | 24H | 22 |

| # | QUERY | INDEX |
|----|-------------|-------|
| 11 | XSMN | 21 |
| 12 | DỊCH | 20 |
| 13 | XỔ SỐ | 15 |
| 14 | TIN TUC | 15 |
| 15 | GAME | 14 |
| 16 | GMAIL | 13 |
| 17 | XEM PHIM | 12 |
| 18 | FB | 11 |
| 19 | ZING | 11 |
| 20 | GOOGLE DỊCH | 11 |

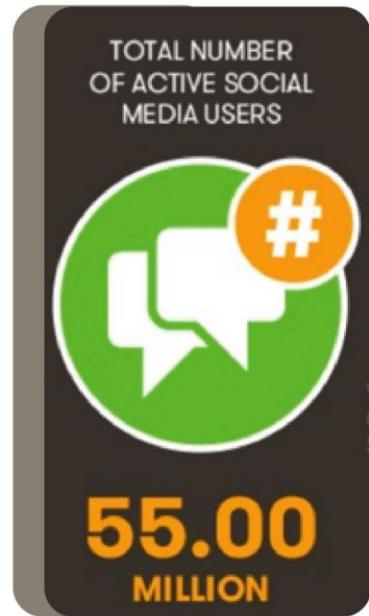
(*) Theo wearesocial

FREQUENCY OF WATCHING ONLINE VIDEO



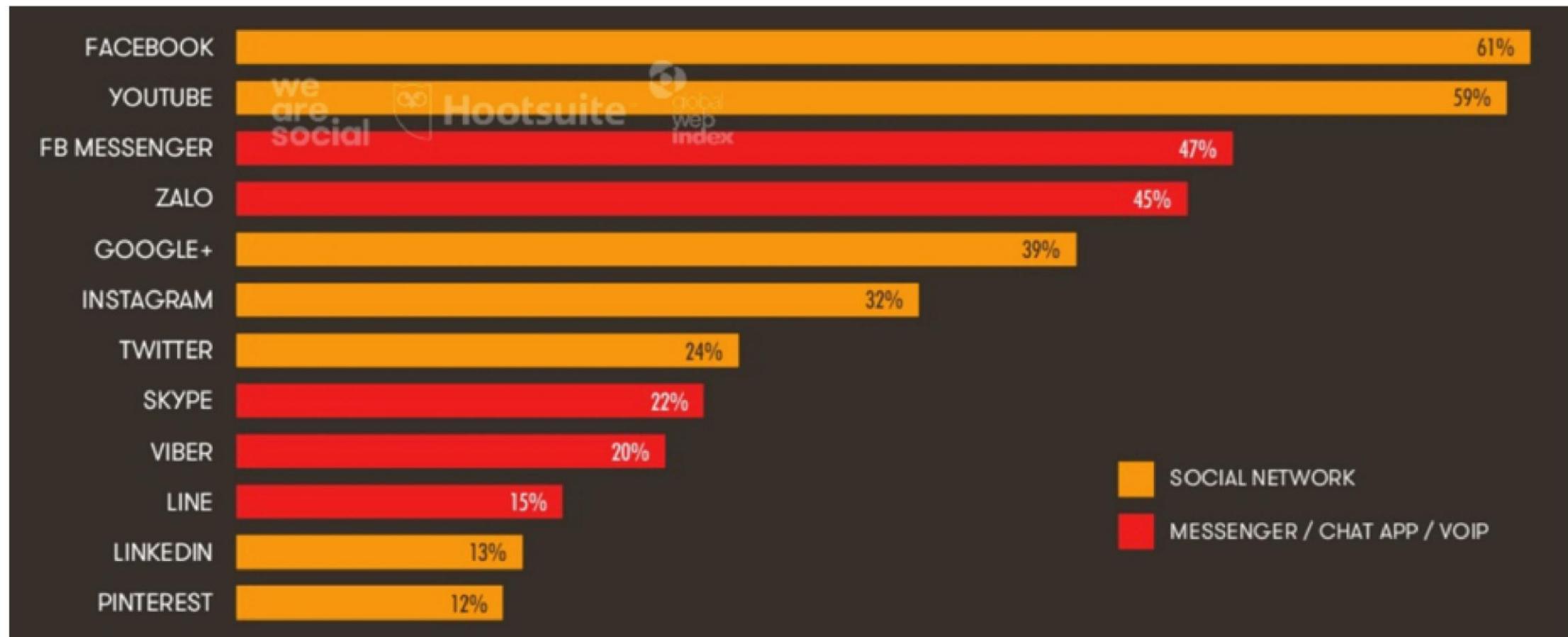
(*) Theo wearesocial

SOCIAL MEDIA USE



(*) Theo wearesocial

MOST ACTIVE SOCIAL MEDIA PLATFORMS



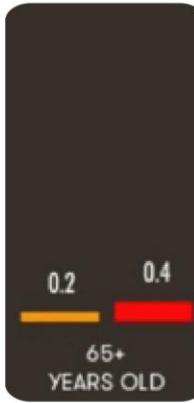
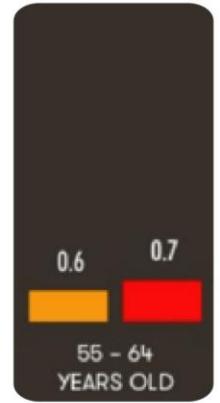
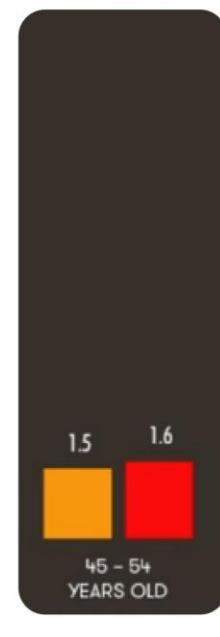
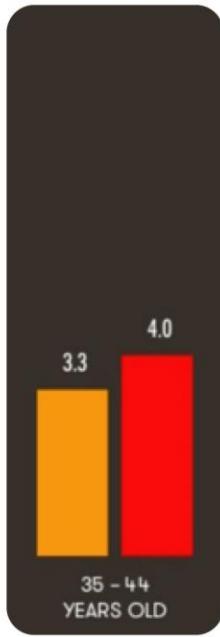
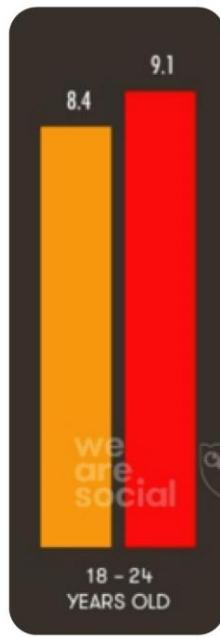
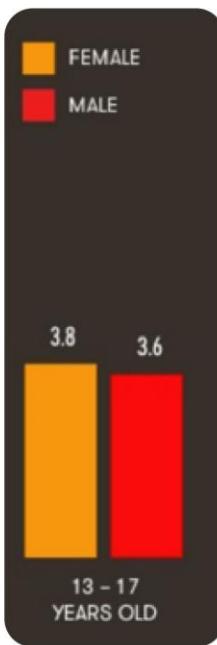
(*) Theo wearesocial

FACEBOOK USAGE ANALYSIS



(*) Theo wearesocial

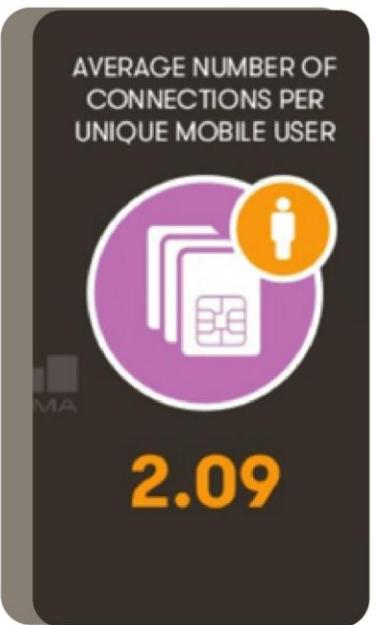
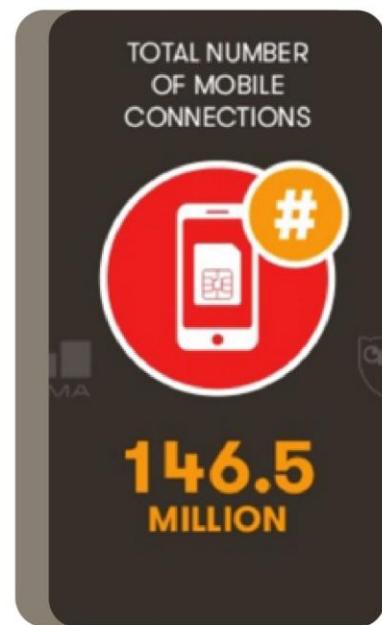
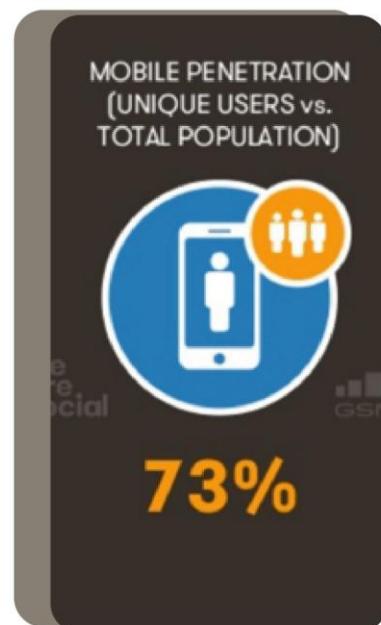
PROFILE OF FACEBOOK USERS



| AGE | TOTAL | FEMALE | MALE |
|---------|------------|--------|------|
| TOTAL | 55,000,000 | 47% | 53% |
| 13 - 17 | 7,400,000 | 7% | 7% |
| 18 - 24 | 17,000,000 | 15% | 16% |
| 25 - 34 | 18,000,000 | 15% | 18% |
| 35 - 44 | 7,300,000 | 6% | 7% |
| 45 - 54 | 3,100,000 | 3% | 3% |
| 55 - 64 | 1,300,000 | 1% | 1% |
| 65+ | 540,000 | 0.3% | 0.7% |

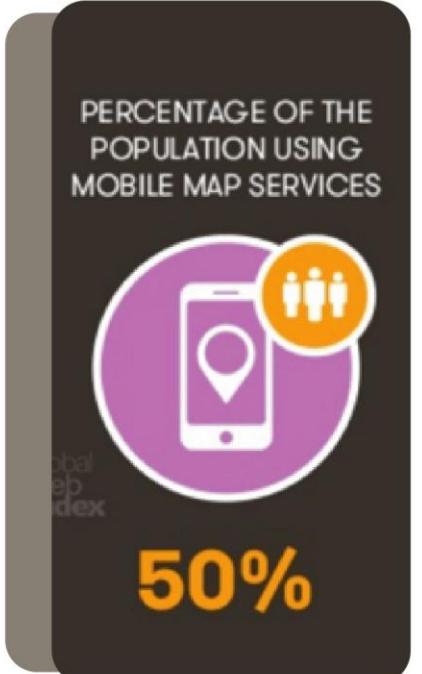
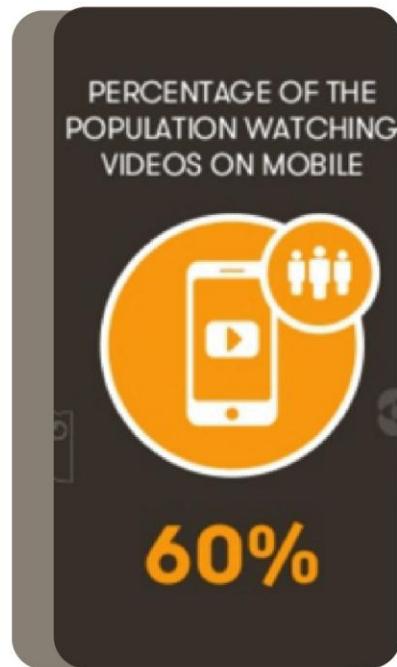
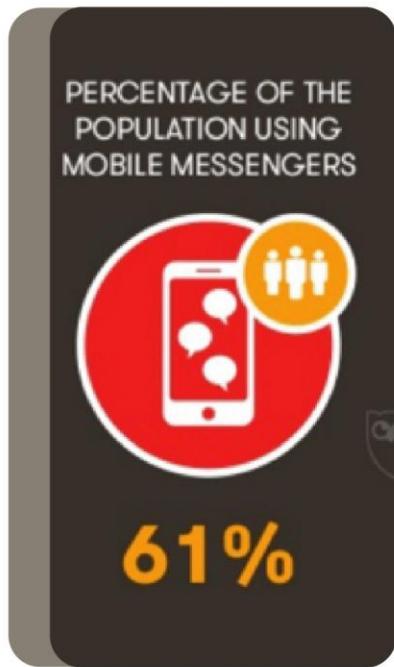
(*) Theo wearesocial

MOBILE USERS vs. MOBILE CONNECTIONS



(*) Theo wearesocial

MOBILE ACTIVITIES



(*) Theo wearesocial

TOP APP RANKINGS

RANKING OF MOBILE APPS BY MONTHLY ACTIVE USERS

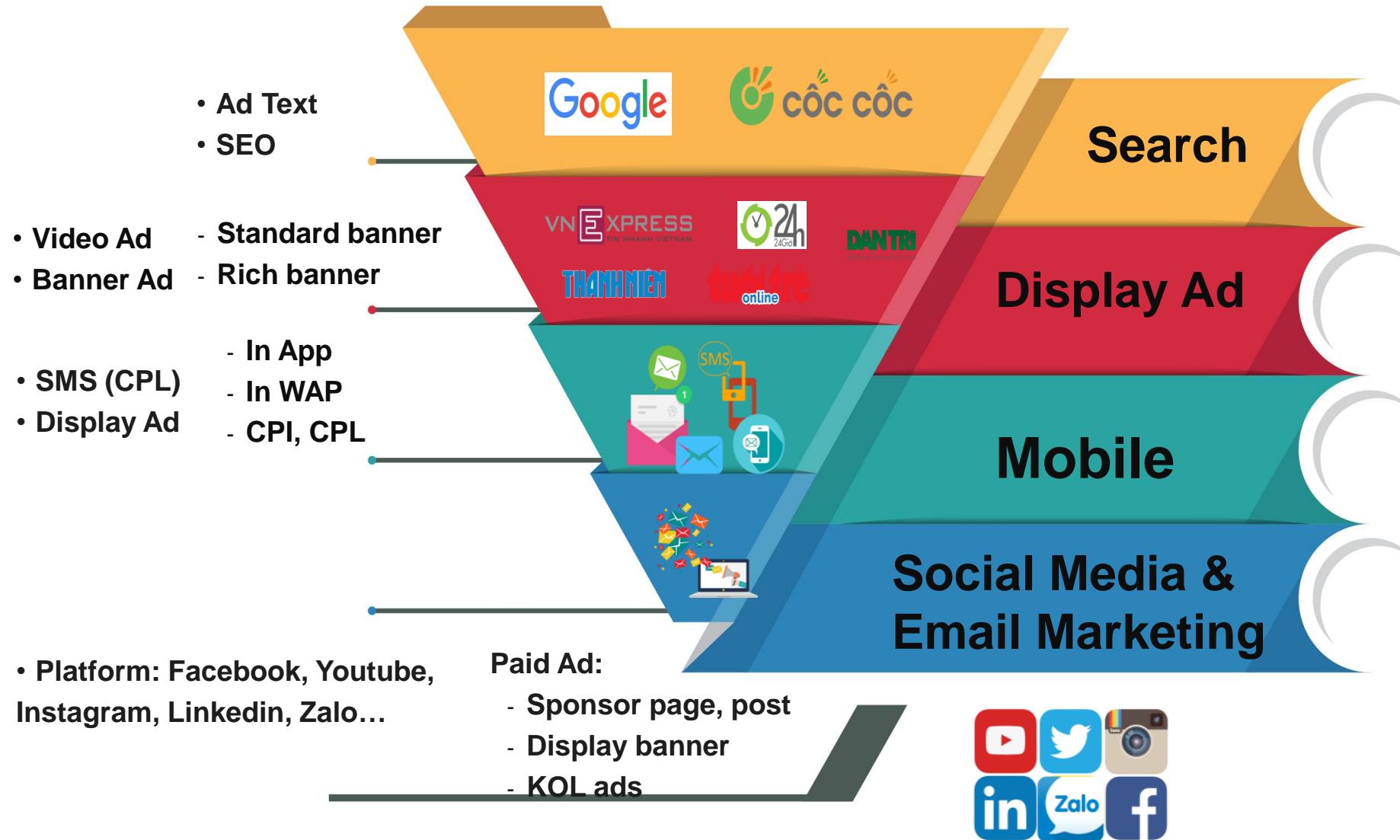
| # | APP NAME | DEVELOPER / COMPANY |
|----|--------------------|---------------------|
| 01 | FACEBOOK | FACEBOOK |
| 02 | FACEBOOK MESSENGER | FACEBOOK |
| 03 | ZALO | VNG |
| 04 | ZING MP3 | VNG |
| 05 | VIBER | RAKUTEN |
| 06 | GRAB | GRAB |
| 07 | INSTAGRAM | FACEBOOK |
| 08 | NHACCUATUI | NCT |
| 09 | SKYPE | MICROSOFT |
| 10 | UBER | UBER TECHNOLOGIES |

RANKING OF MOBILE APPS BY NUMBER OF DOWNLOADS

| # | APP NAME | DEVELOPER / COMPANY |
|----|--------------------|--------------------------|
| 01 | FACEBOOK MESSENGER | FACEBOOK |
| 02 | FACEBOOK | FACEBOOK |
| 03 | ZALO | VNG |
| 04 | ZING MP3 | VNG |
| 05 | CAMERA360 | PINGUO |
| 06 | B612 | NAVER |
| 07 | NHACCUATUI | NCT |
| 08 | SNOW SELFIE CAMERA | NAVER |
| 09 | WIFI MASTER KEY | SHANGHAI LANTERN NETWORK |
| 10 | SHOPEE | GARENA ONLINE |

(*) Theo wearesocial

ONLINE MEDIA CHANNELS



ONLINE MEDIA BUYING PROGRESS

2007

2009

2013- present

- CPD (Cost per duration)

- CPM (Cost per mille)
- CPC (Cost per click)/
PPC (Pay per click)
- CPL (Cost per Lead)

- CPA (Cost per acquisition)
- CPS (Cost per sales)

ONLINE METRICS

- CPI
- NRU (New register user)
 - Paid user



Retention rate (RR)

LU (Loyal User)

ARPU (Average revenue per user)

ARPPU (Average
revenue per
paying user)

Web tracking tools :

Ad Server: **Sizmek**



In-target: **Miaozhen Systems**



BAV (Brand Safety & viewability): **IAS Integral Ad Science**

MOAT

grapeshot



TRACKING TOOLS

VIETNAM'S DIGITAL ADVERTISING LANDSCAPE 2018



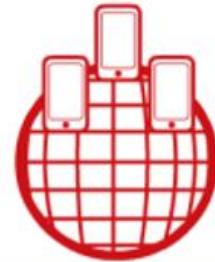


DIGITAL MARKETING TRENDS 2019



#2: MOBILE-FIRST FOCUSED

#1 MOBILE



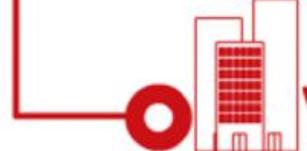
GLOBAL SMARTPHONE USERS WILL REACH

2 BILLION BY 2015

- ✓
- ✓
- ✓
- ✓

ACROSS ALL INDUSTRIES: MOBILE INTERNET TRAFFIC IS INCREASING AT A RATE OF

3.5% PER MONTH



TABLET USERS ACCESS SEARCH **73.9%** OF THE TIME
MORE THAN ANY OTHER OTHER DEVICES



New ads format, more creative
Location based
Mobile apps
Budget > 30%

#3: CONTENT MARKETING & REAL TIME CONTENT



#3: CONTENT DIVERSITY





- Infographic
- Video
- Live Stream video is booming

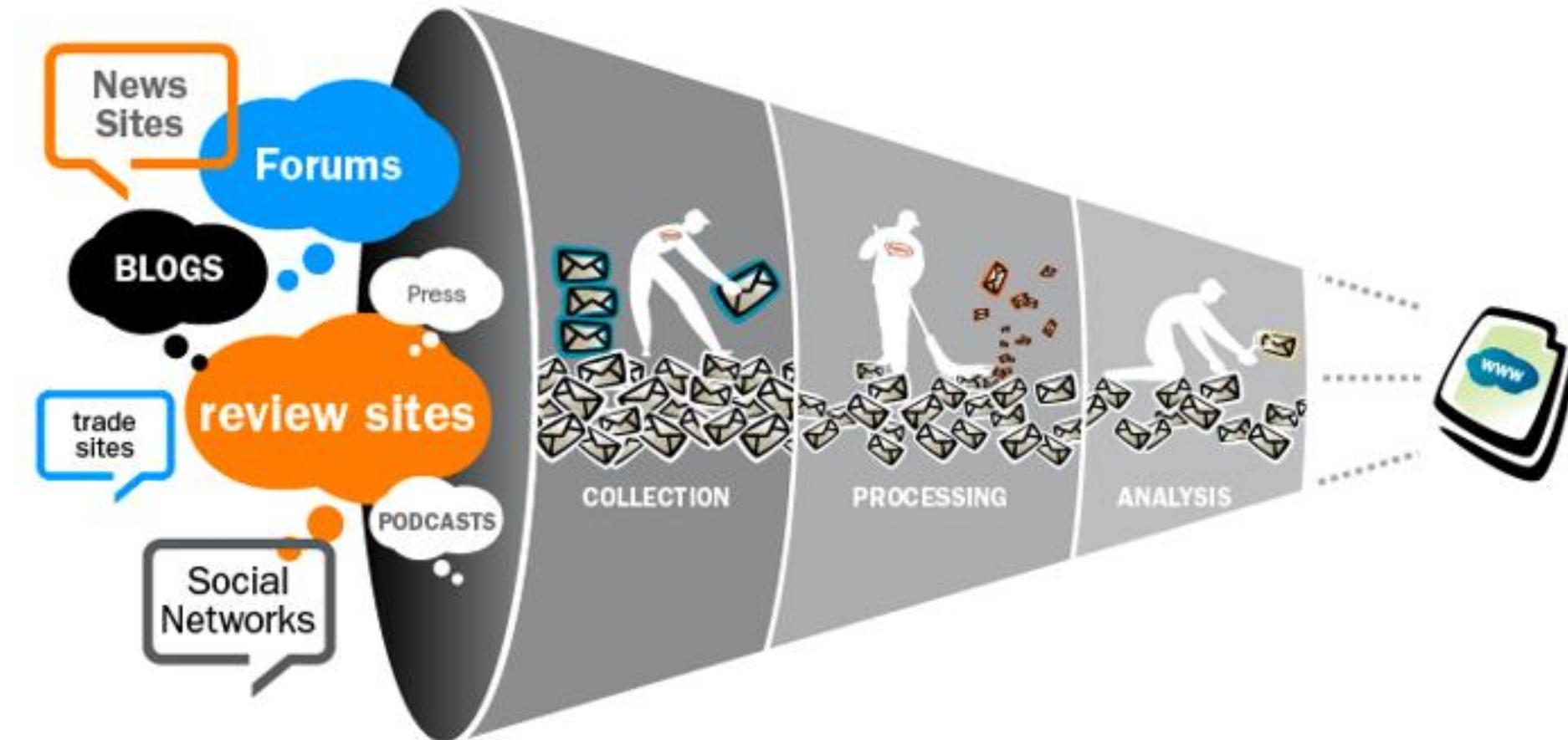
#3: MULTI-NETWORKS INTERACTION



#4. REALTIME SOCIAL LISTENING

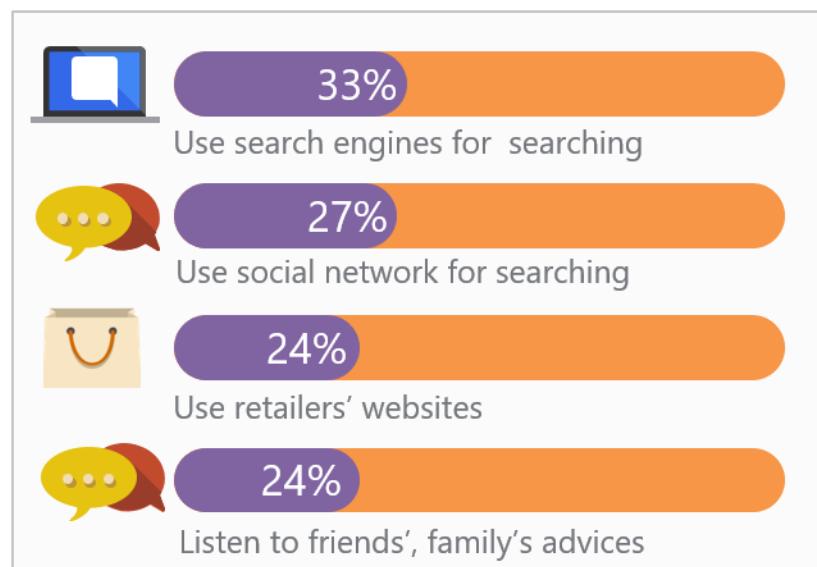


#4. REALTIME SOCIAL LISTENING



#5. E-COMMERCE & SOCIAL SHOPPING

Online shopping people usually do research by
search engines and social network



#5. E-COMMERCE & SOCIAL SHOPPING

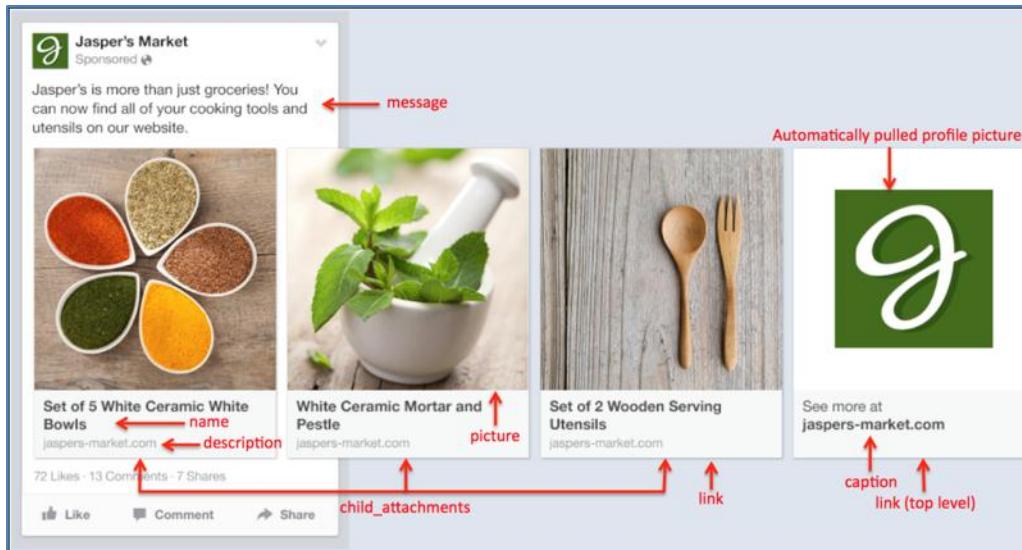
Many people who haven't bought anything online want to start shopping online



44% Vietnamese internet users

who haven't bought anything online want
to shop online in the next 12 months

#5. E-COMMERCE & SOCIAL SHOPPING



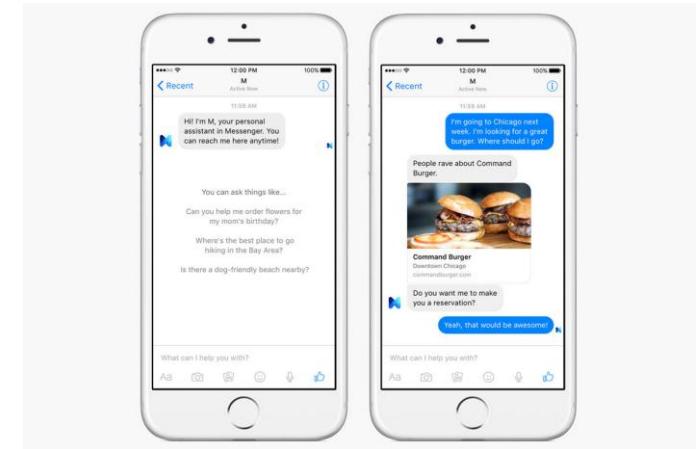
6. KOL Platform



7. Performance marketing



8 Chat Bots , Automation marketing



Thank you!



Contact: 0366866983

Mail: oanhvu@omegamedia.vn