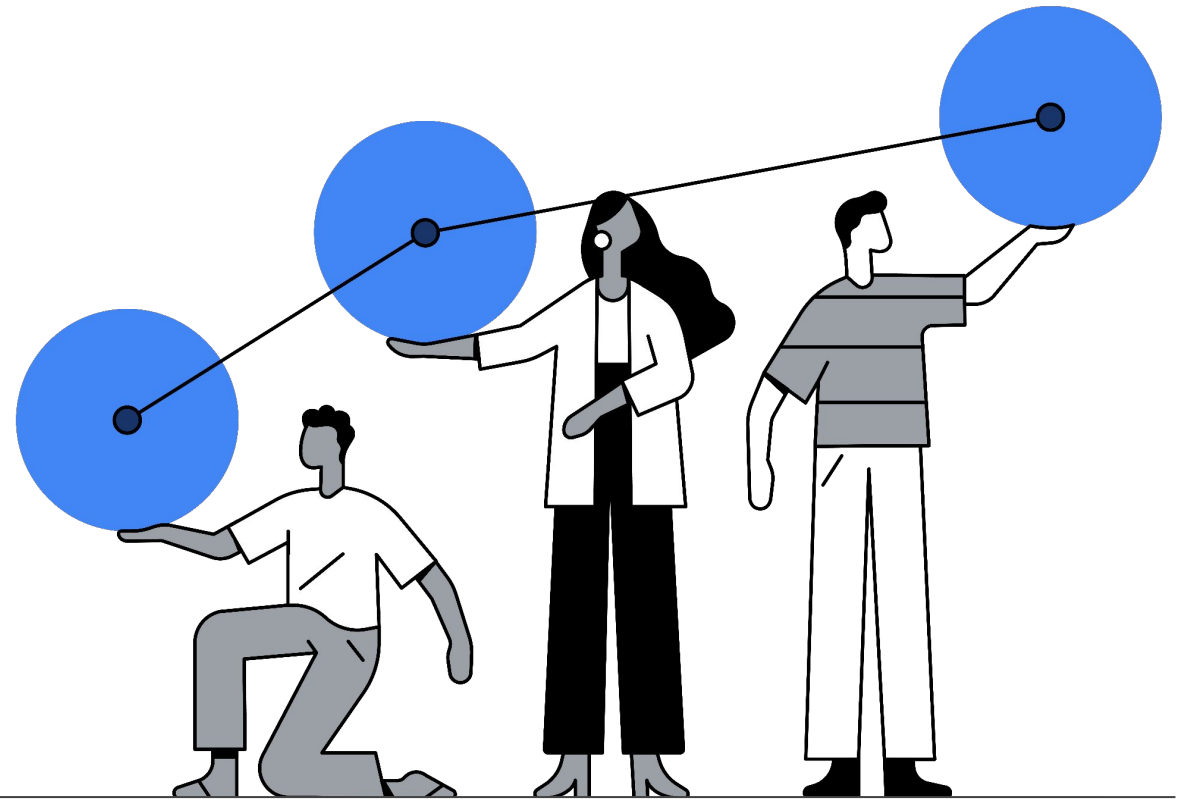


Ecosystem Report 2021

Modern Marketing





With increasing digital penetration and time spent, Vietnamese consumers spend over four hours a day on digital platforms for information, entertainment, networking as well as shopping. Low-priced data packages and cheap smartphones have meant that digital has become part of the average Vietnamese's lifestyle, and it's not incorrect to say that modern marketing is primarily digital in nature. But not all advertisers have understood the right way of leveraging the entire digital ecosystem for their brands. The understanding of digital marketing in most organizations is still basic with lack of clarity on platforms, objectives or even the right KPIs to be used.

First and foremost, there needs to be a clear vision within the organisation of what objectives would digital marketing help them in achieving. Next is an audit of where they stand, where do they want to move and in what timeframe. Thirdly, it is about who will help them in driving this change and unlocking the opportunities. This will need to be a combination of internal upskilling as well as identifying the right external agency and tech partners who can navigate this journey. Lastly, speed of activity is of essence since digital marketing evolves very fast with new consumer needs emerging all the time and players and technologies coming up to fulfil these needs. Testing and learning with the right metrics in place is an important component of modern digital marketing.



Shankar Rajagopal

CEO, Mindshare Group Vietnam



The flight to digital in Vietnam, fueled by COVID-19, has led to quick digital adoption and lasting growth. Brands in Vietnam have a massive opportunity to advance to their next stage of digital marketing maturity. That means creating a digital marketing strategy that extends beyond traditional marketing - beyond mobile with Connected TV, beyond urban into sub-geo regions, beyond awareness to performance-driven campaigns, and beyond cookies into a privacy-first future. Brands that put privacy first and consider what a first-party data strategy looks like for their businesses are the ones defining what Modern Marketing in Vietnam means today.



Tram Nguyen

Country Director, Vietnam, Laos, Cambodia, Google APAC



With COVID, digitalisation is no longer a luxury but a necessity. Given the outbreak's severe impact, we may see a permanent shift in business attitudes and behaviors towards digitalising, which will have an outsized impact on Vietnam's growing digital economy. Therefore, we have together built this annual report for the whole players of modern marketing. The ecosystem report addresses how advertisers and agencies, publishers and other stakeholders are planning their strategy in the movement of modern marketing. It focuses on providing a comprehensive view of how changes of modern marketing need to be taken into account by advertisers and stakeholders in the future with numerous insights and data.

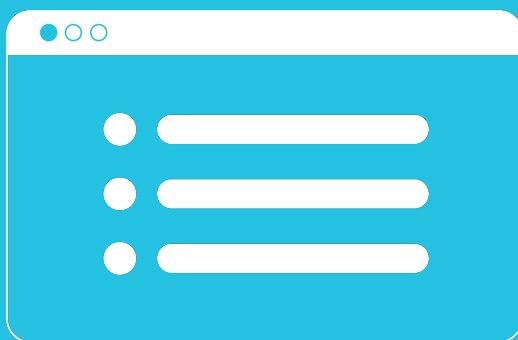


Phan Bich Tam

Country Manager, MMA Vietnam, Myanmar & Cambodia

Agenda

In this report, we aim to help marketers and business leaders build their digital marketing strategies by providing the latest insights into technology trends and practical solutions every marketer must know in the era of modern marketing.



- 1** [Digital adoption in Vietnam is now mainstream](#) 7
- 2** [Why modern marketing maturity matters and how organizations can get started](#) 12
- 3** [Key consumer trends and how they lead to marketers' solutions](#) 19
 - [Beyond mobile - with Connected TV \(CTV\)](#)
 - [Beyond awareness - with active shoppable formats](#)
 - [Beyond urban - with sub-location targeting](#)
- 4** [The Power of Preparing Now](#) 45
- 5** [How brands put AI, Programmatic, and APIs to advance on the digital maturity journey](#) 54
- 6** [Questions and resources to help you get started](#) 61

Executive Summary

Digital adoption is now mainstream in Vietnam, not only based on the number of internet user penetration but in the engagement and sentiments towards digital services. This trend is further accelerated with the pandemic, which has led to rapid adoption of digital services and online consumer behaviors that are here to stay.

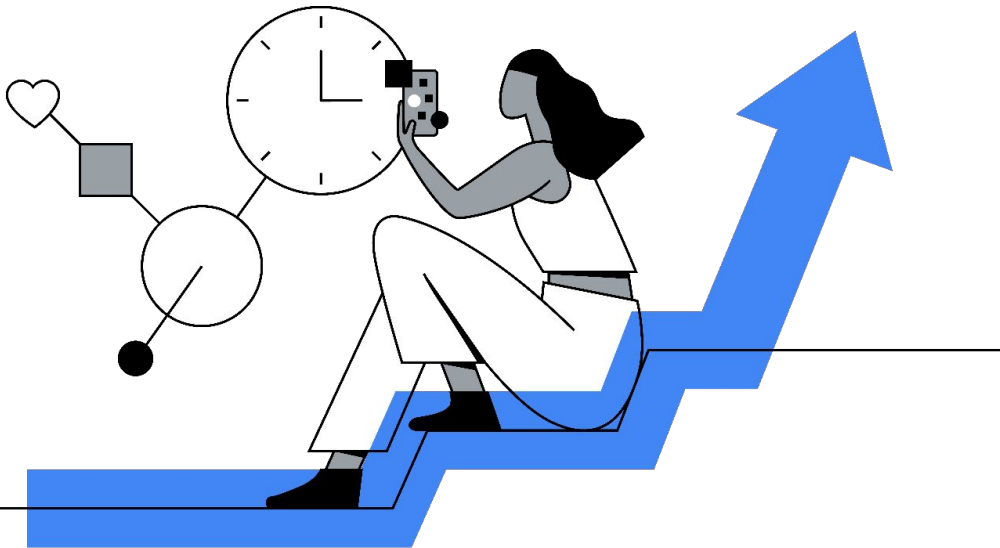
Modern marketing maturity matters for businesses to keep pace with changes in the advertising industry, consumer expectations, and advancements in underlying technologies for campaigns. There are four stages of digital maturity. There is huge headroom for brands in APAC in general, and in Vietnam specifically, to advance from nascent or emerging stages to the multi-moment stage. Organizations at the multi-moment stage can potentially unlock incremental revenues and cost efficiencies as they have direct relationships with their customers.

Key consumer trends lead to evolution of marketing solutions. In Vietnam, consumers are going beyond mobile to Connected TVs (CTV), driven by the pandemic and the rise of over-the-top (OTT) consumption in Vietnam. Consumers are going beyond awareness, to active shopping. E-commerce adoption and growths are driven by the shift in consumer behaviors to online from the way they get inspiration, research for product and service information to make purchase decisions. Consumers beyond metro areas are increasingly active online, giving brands opportunities to engage with non-urban consumers in much more interactive and localized ways.

The power of preparing now for a privacy-first future is agility in a changing environment. With higher expectations from online users and changes amongst platform technologies, organizations need to take actions to enable the ad-supported ecosystem while respecting user privacy. With a transparent approach towards first party data, effective advertising and user privacy can go hand in hand.

AI, Programmatic, and APIs are put to the test as organizations advance on the digital maturity stages. Those who experiment and prepare for a privacy-first future with emerging technologies see improvements in not only key performance metrics but also user engagement.

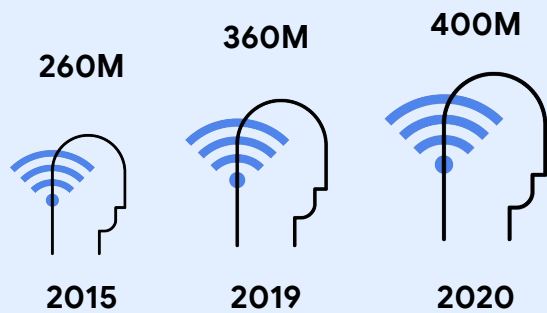
1



Digital Adoption
is now mainstream

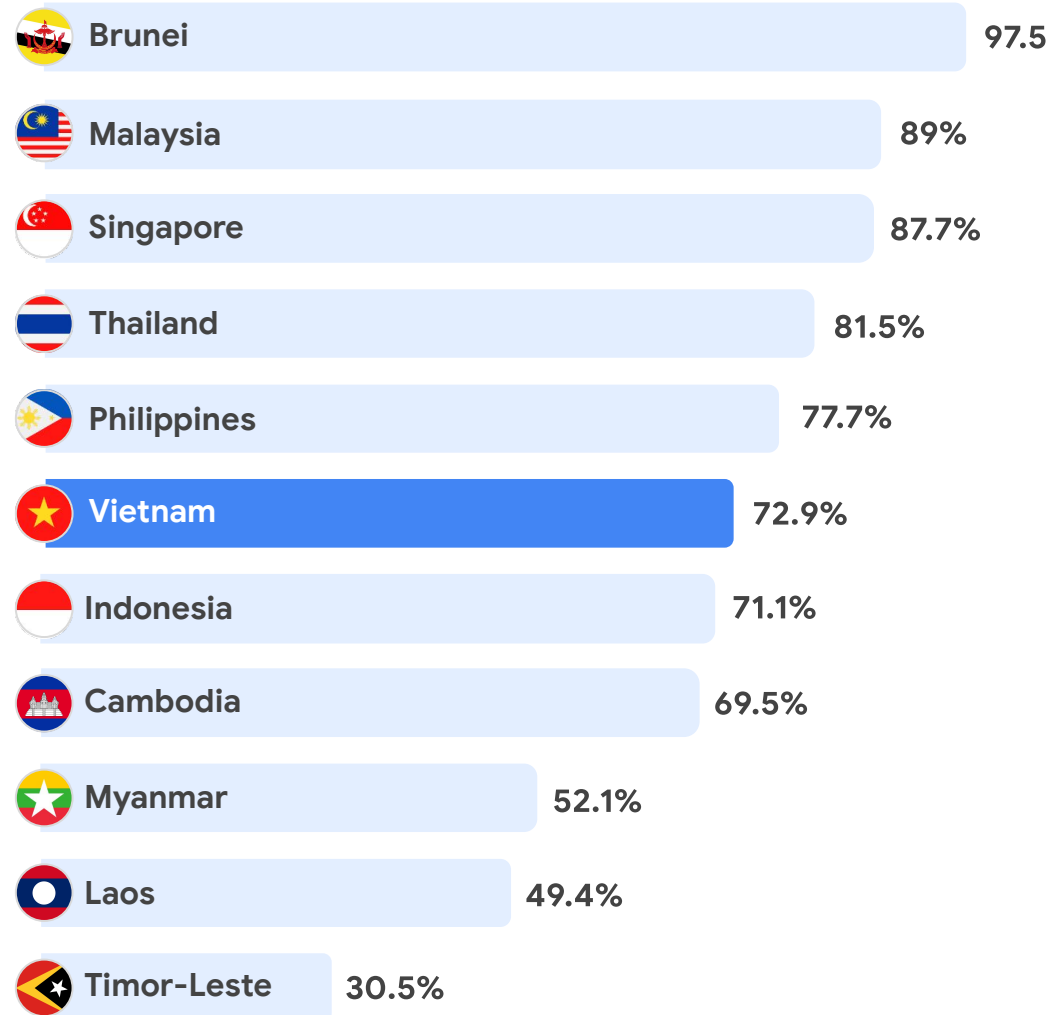
New internet user base is growing fast in Southeast Asia, with Vietnam reaching 73% penetration in 2020

Total Internet users in SEA



Source: e-Conomy SEA 2020 report; Statista (2020)

Internet penetration in Southeast Asia as of December 2020, by country

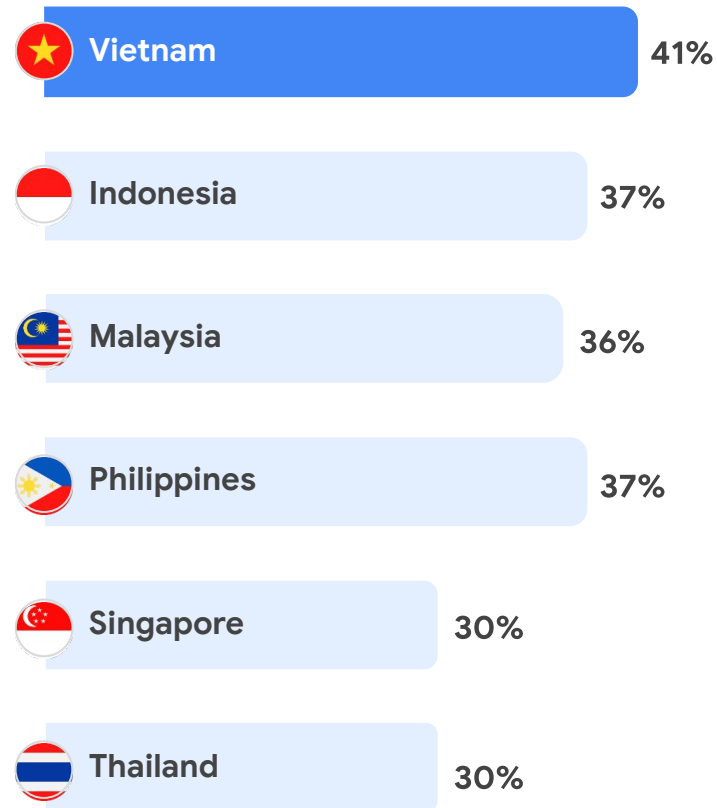


Vietnam sees the highest influx of new digital consumers among SEA countries due to COVID-19

Digital adoption is here to stay

*New digital services users: consumers who were not already purchasing / signing up for / subscribing to digital services, but did so as a result of lockdowns S7. You mentioned that you did the following in the past 6 months. Did this come about as a result of the Coronavirus/COVID-19 lockdown? Base: Total 'new' user responses: Singapore n=1443, Indonesia n=2762, Malaysia n=1628, Vietnam n=2814, Philippines n=1818, Thailand n=1707, SEA n=12,172 Source: Kantar. Note: %s are based on responses rather than respondent -on all who qualified for the vertical (not necessarily allocated to vertical)
Source: [e-Conomy SEA 2020 report](#)

% of consumers who are new to digital services out of total consumers of digital services



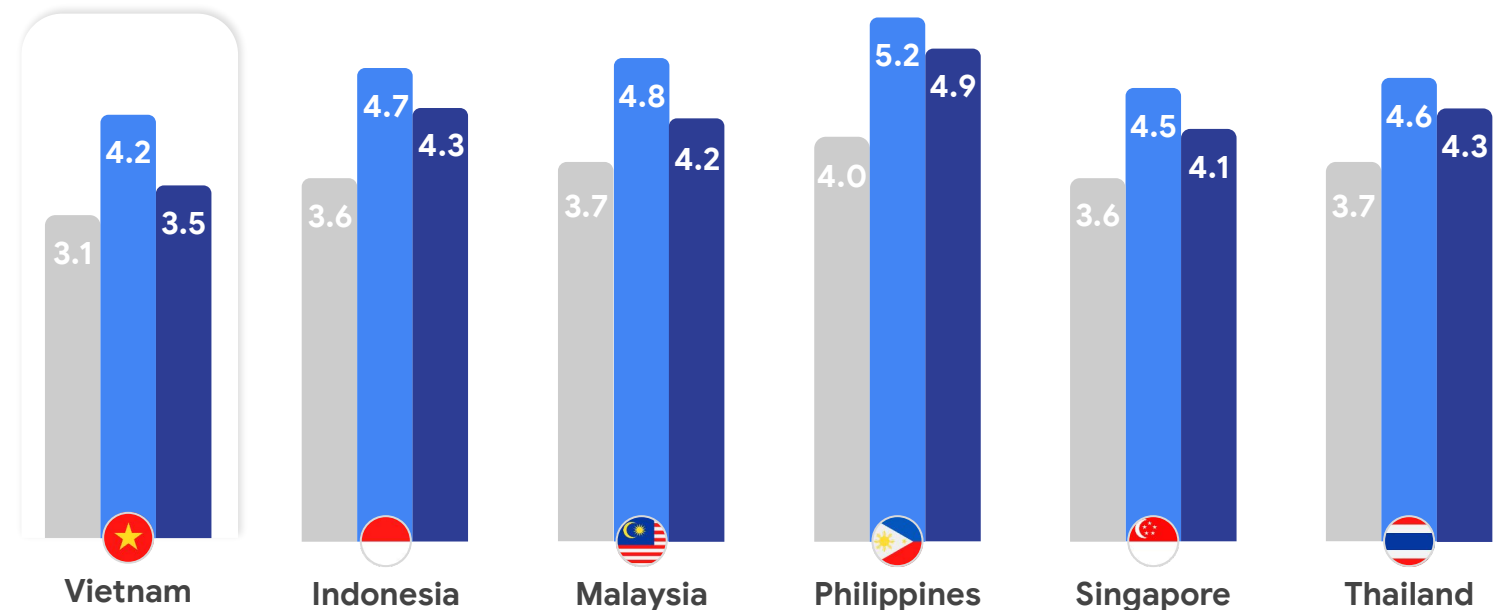
Across all markets, digital engagement increased by an additional hour of personal use per day during COVID restrictions



COVID also leads to increase in hours spent online per day in SEA, with Vietnam peaking at **4.2 hours**

Average hours spent online per day (personal use)

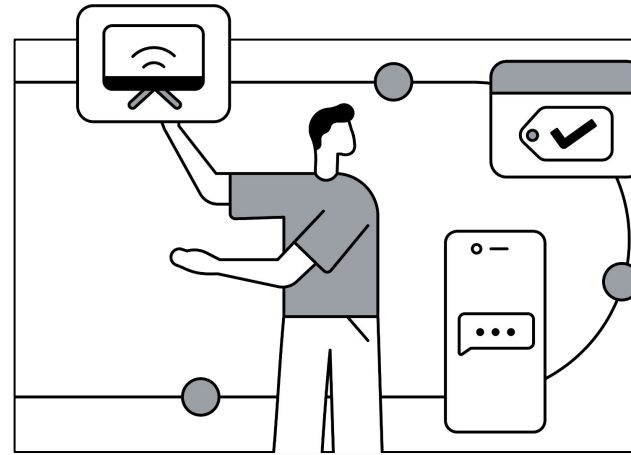
Before During After



12. When you go on the Internet (for personal usage, not for work), how long do you normally spend in a day? Base: New users: Singapore n=421, Indonesia n=563, Malaysia n=437, Vietnam n=591, Philippines n=464, Thailand n=377 Existing users: Singapore n=701, Indonesia n=813, Malaysia n=605, Vietnam n=744, Philippines n=640, Thailand n=648 Source: Kantar *Note: %s are based on respondent level within new/existing, rather than responses Source: e-Conomy SEA 2020 report

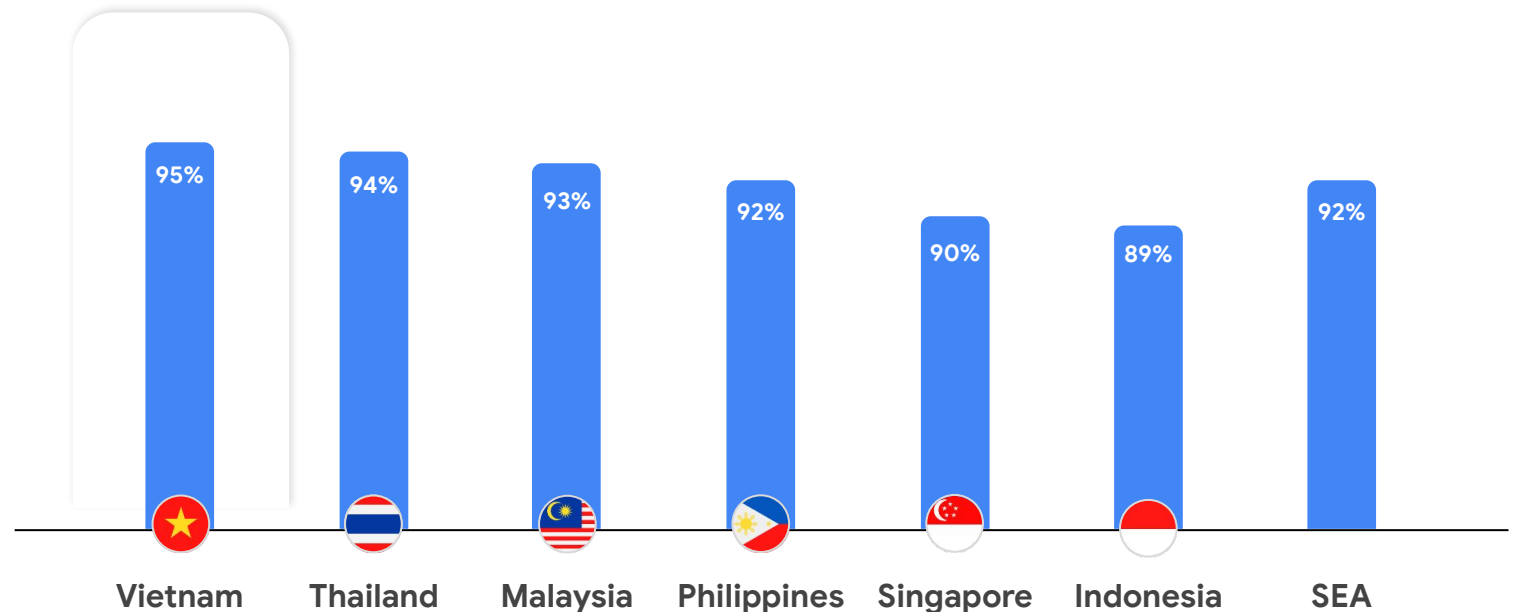
This surge in digital adoption is sustained as the majority of users find that digital technology helps them meet their needs

Milieu Insight research commissioned by Google. Fieldwork ran from July 1-5, 2021 in Singapore, Malaysia, Thailand, Indonesia, Vietnam and the Philippines, with a total n=6,000 interviews. Results are representative of the national online population according to age, gender and region for each country, and the margin of error is +/- 3% with a 95% confidence level.
Source: [Online with a Purpose: 9 months on, Google Aug 2021](#)

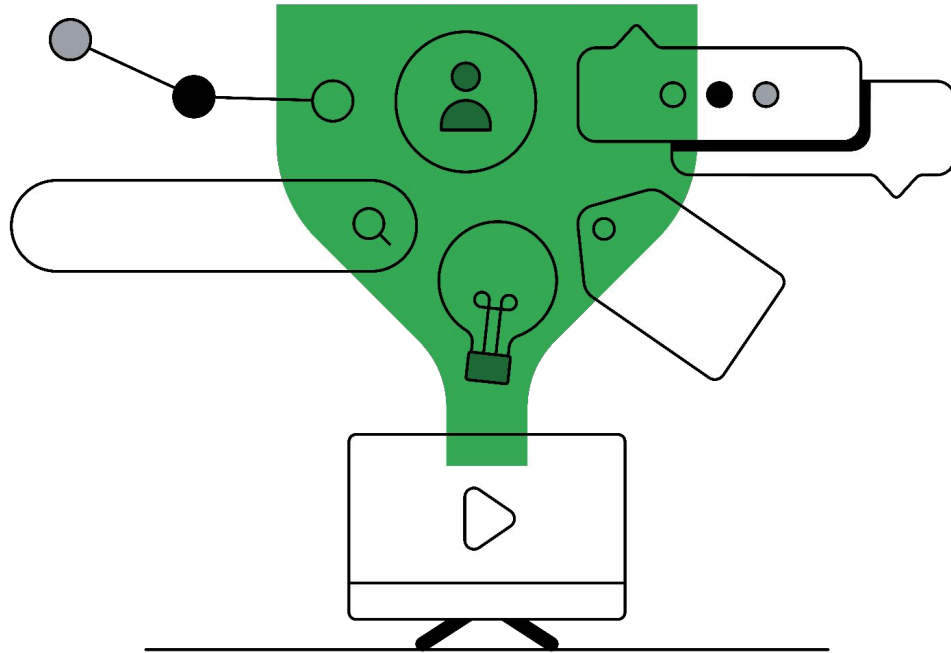


92% of users in SEA find that digital technology helps them meet their needs
Vietnam ranks **#1** among SEA countries

% of users for whom technology meets their needs

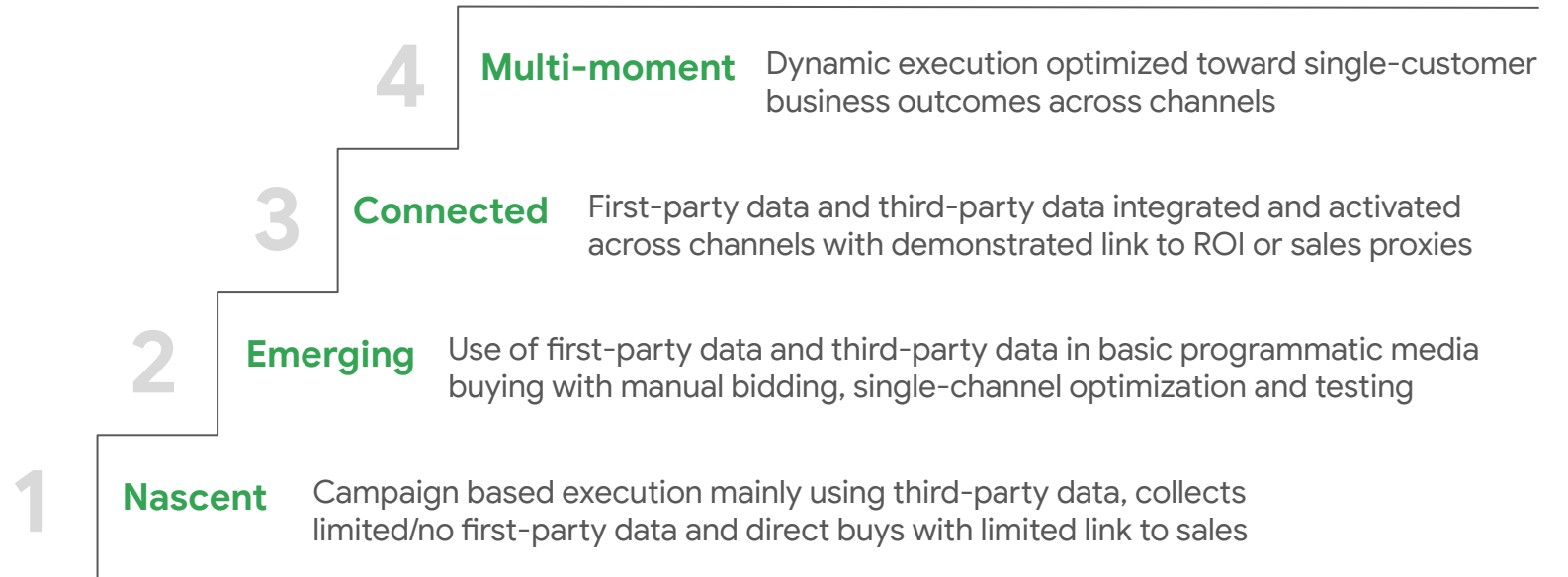


2

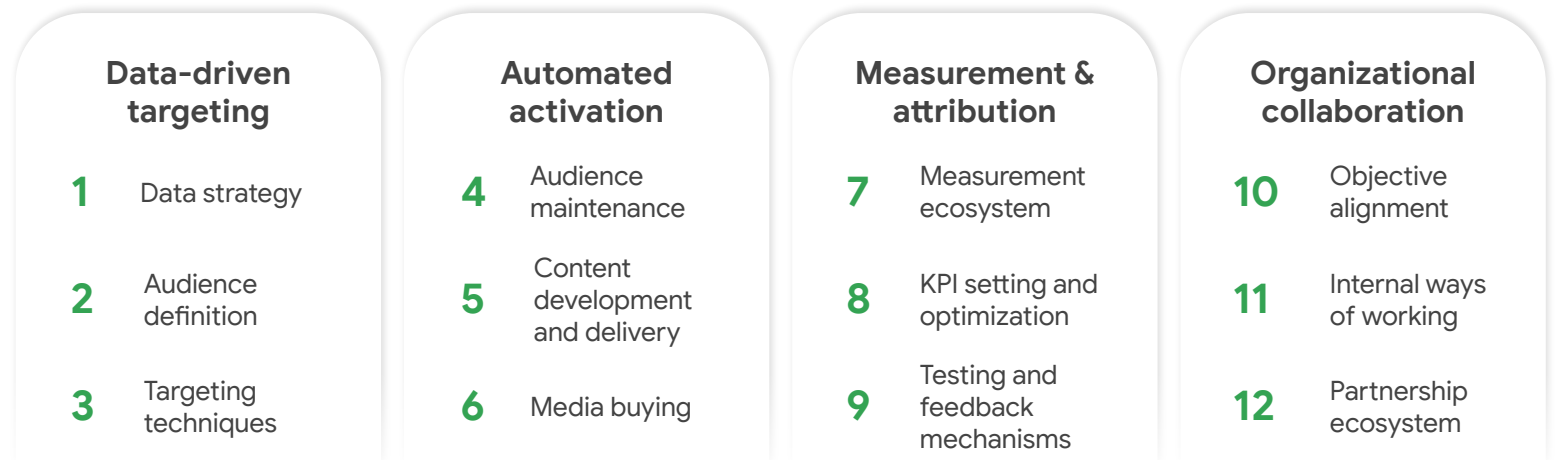


Why **modern marketing maturity** matters and how organizations can get started

The four stages of digital maturity considered across key activities



Key Activities



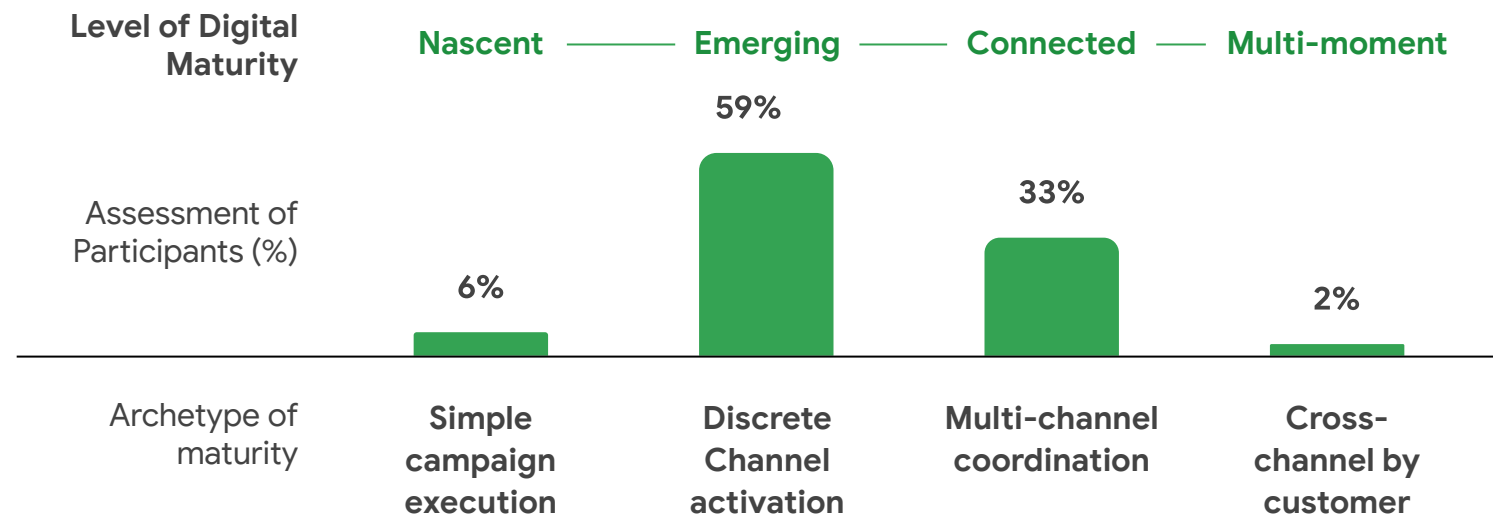
Source: [Understanding the path to digital marketing maturity](#), Boston Consulting Group, APAC

Still huge room for growth when it comes to digital marketing maturity

2%

of Asia Pacific brands are realizing the full potential of digital marketing only

Base n = 185
Source: BCG Digital Marketing Maturity study 2018 and 2019, Asia Pacific brands



“

In recent years, several Consumer Goods brands in Vietnam put in concerted efforts to drive Digital Marketing Maturity. Brands have invested hard work in aligning on a vision, structuring teams, building capability and a structured learning plan. Brands are testing programmatic consolidation and first-party data (1PD) campaign integration with many resulting in stronger campaign performance vs. previous baseline on ROI. A strong part of this performance also has to do with the improving quality of insights and ability to leverage machine learning as maturity improves. It's critical for brands to start this journey to ensure they don't fall behind in Digital Marketing Maturity.

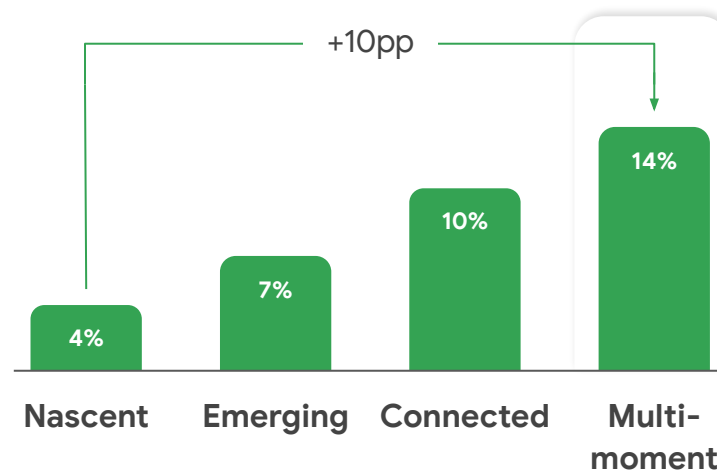


Rafael Scislowski

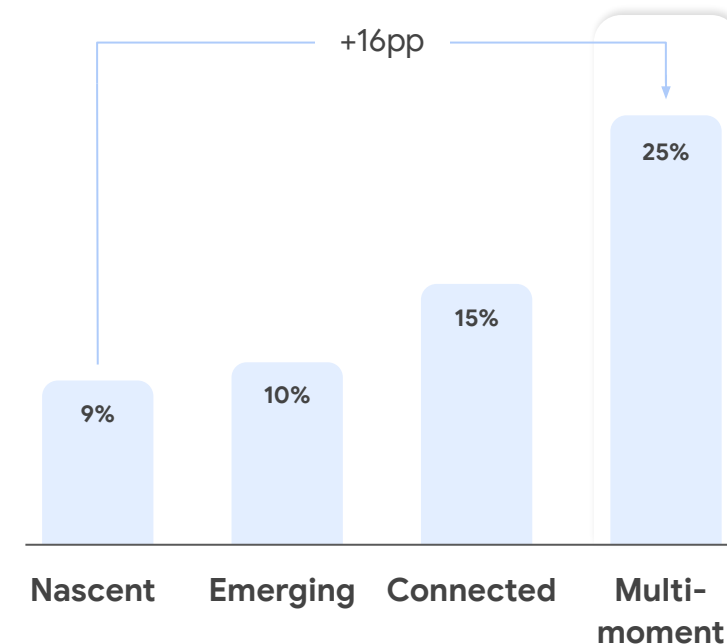
Industry Head, CPG, Vietnam
Google APAC

Moving up to Multi-moment can potentially unlock up to 14% increase in revenue & up to 25% reduction in cost

Average incremental **revenue** attributed to digital marketing (%)



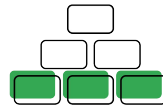
Average incremental **cost efficiencies** attributed to digital marketing (%)



Multi-moment brands attribute **~3x (10pp)** higher incremental revenues...
...and **~3x (16pp)** higher cost efficiencies

Note: pp refers to percentage point difference between two percentages
Source: BCG Digital Marketing Maturity study 2019, Asia Pacific brands

There is a clear path brands can follow to achieve the full benefits of digital marketing

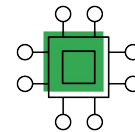


Foundation

Lay a strong foundation

Make every digital touchpoint the best-in-class:

- Speed
- Simplicity
- Convenience
- Discoverable



Technology

Leverage tools & technology

- Leverage tools to monitor signals from consumers
- Lean on automation and Machine Learning to capture emerging demand
- Adapt to new digital format



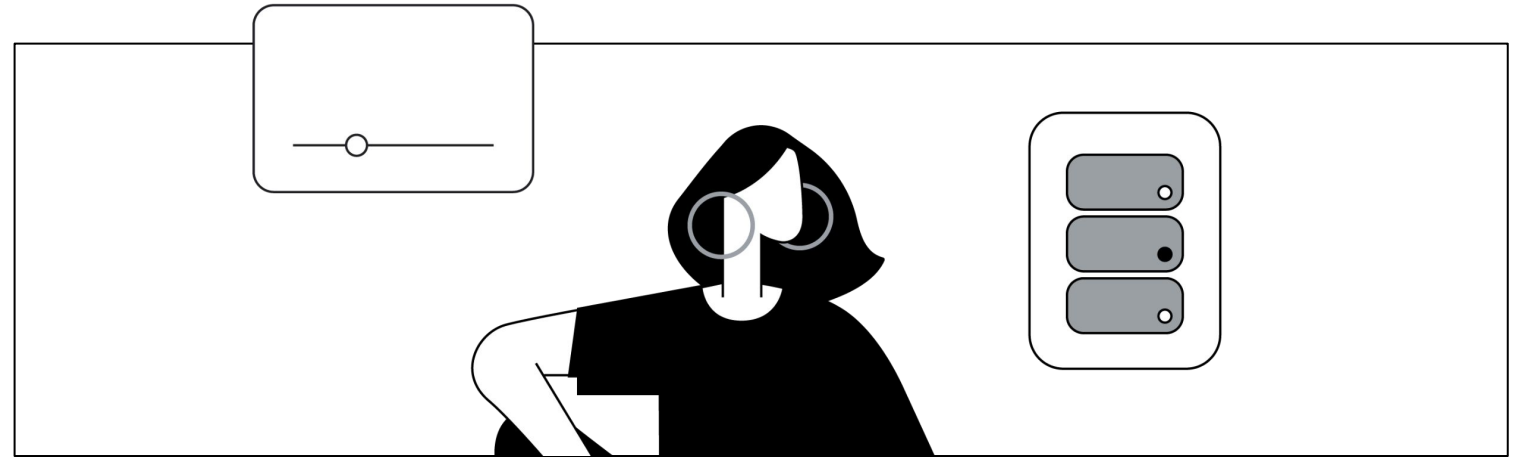
Data-driven decision making

Unlock the full value of data

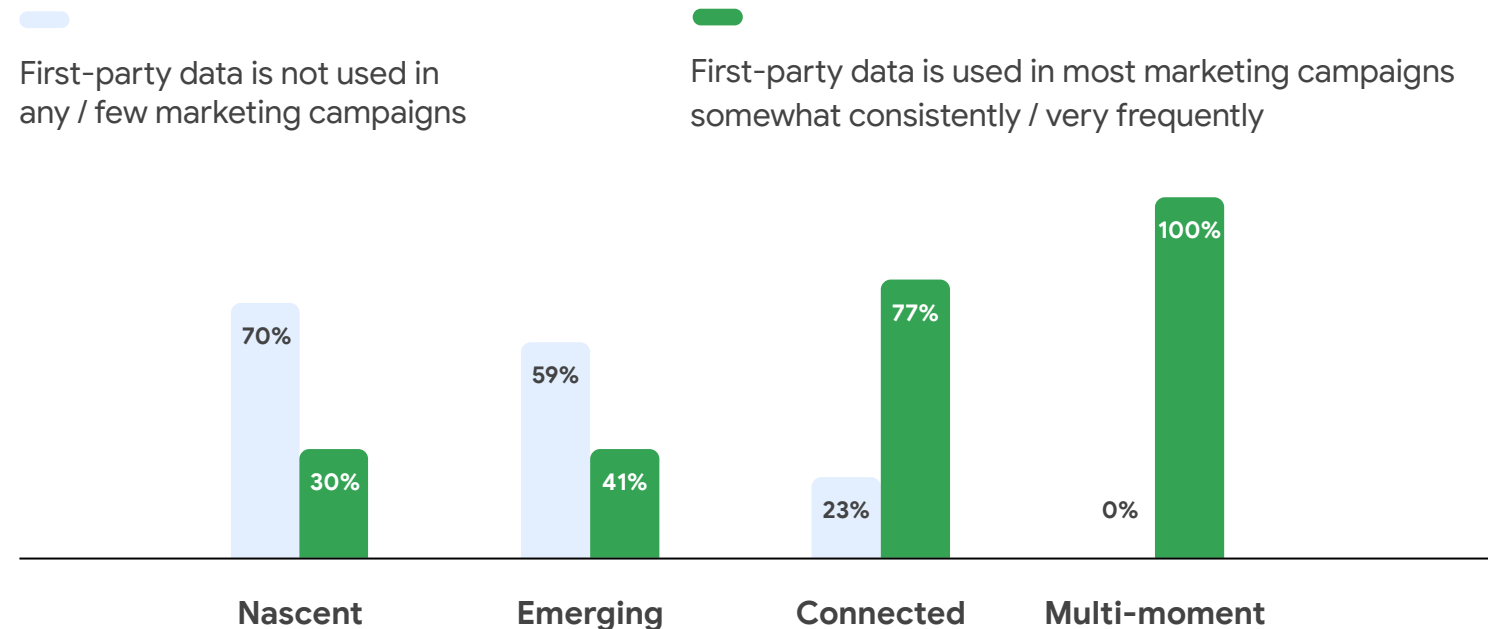
- Empower your team to transform digitally
- Leverage first party relationship and third party data to get a better picture of your customer journey

Ability to leverage first-party data in marketing campaigns is a key trait of multi-moment brands

Note: First-party data refers to data that a company directly collects from customers and thus owns; Taken from responses to "Which of the following best describes how embedded your first-party data is in your marketing efforts currently?"
Source: BCG Digital Marketing Maturity study 2019, Asia Pacific brands



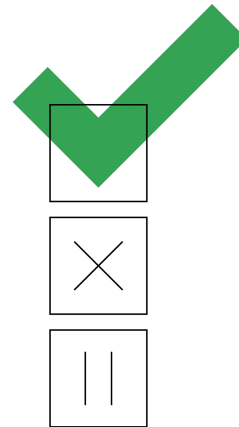
Level of first-party data embeddedness in marketing campaigns



The journey to maturity begins with assessing where your organization is on the maturity curve and where it wants to go

1

Start with an honest assessment of your maturity



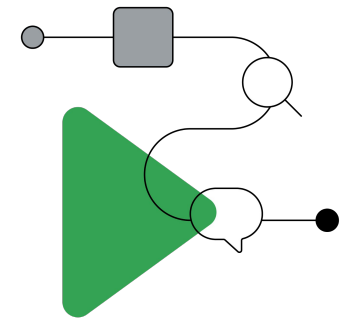
2

Set an ambitious yet realistic goal aligned with changing consumer expectations



3

Plan the roadmap to reach your goal in accordance with regulations

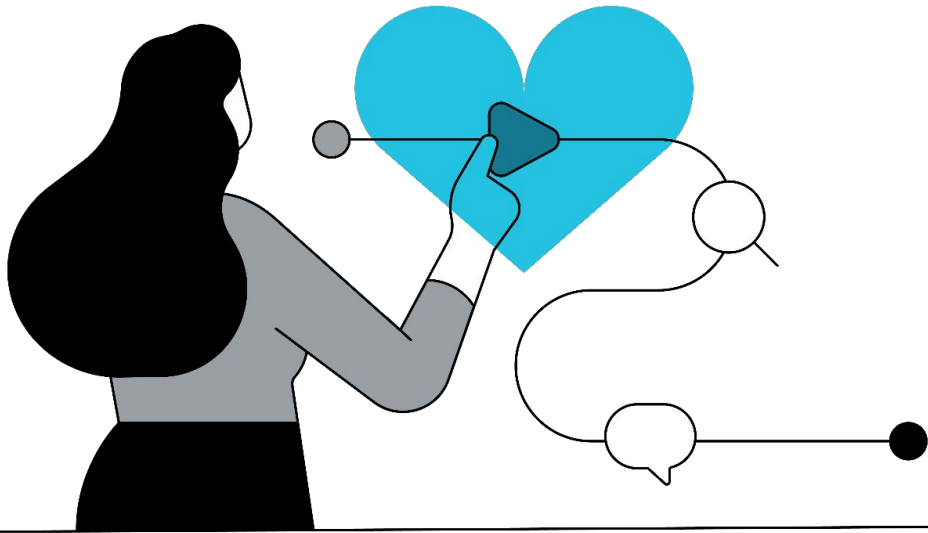


Leverage [Digital Maturity Benchmark](#) tool to evaluate your organization across key attributes



Source: BCG Digital Marketing Maturity study 2019, Asia Pacific brands

3



Key consumer trends and how they lead to marketers' solutions



**Beyond
Mobile**

with

Connected TV



**Beyond
Awareness**

with

Active Shopping



**Beyond
Metro**

with

Sub-location

Connected TV (CTV) is rising in across Vietnam



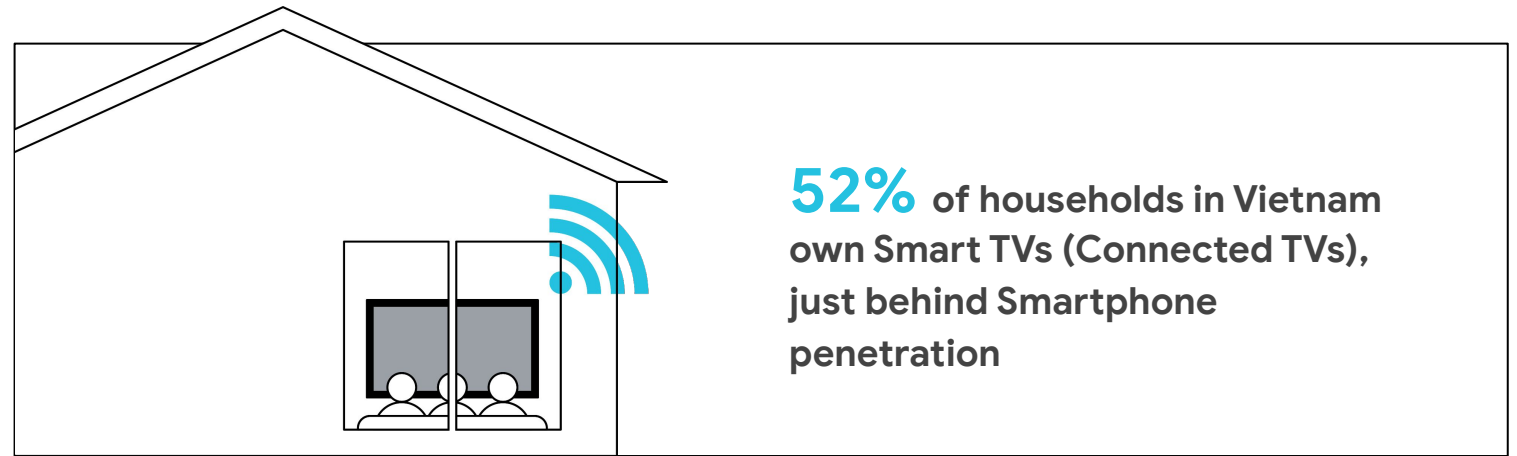
Connected TV owners' household location

50% Urban

35% Sub Urban

42% Rural

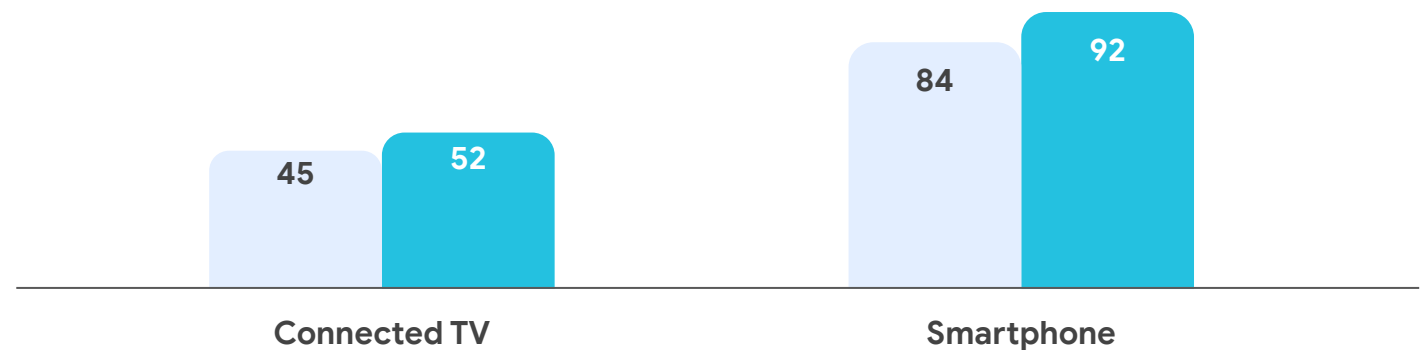
Source: GroupM Vietnam Touchpoint 2020; Global Web Index, H1-2020



Penetration of Household items (%)

2018 (N = 4,603)

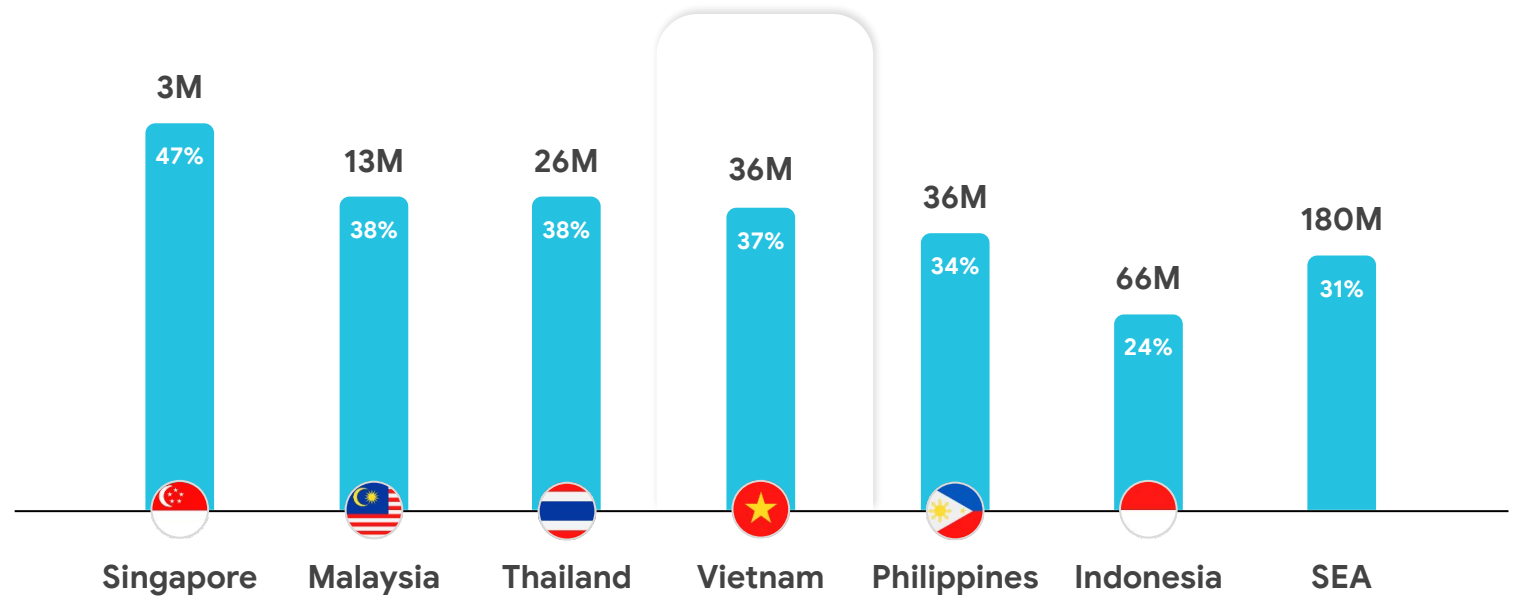
2020 (N = 4,500)



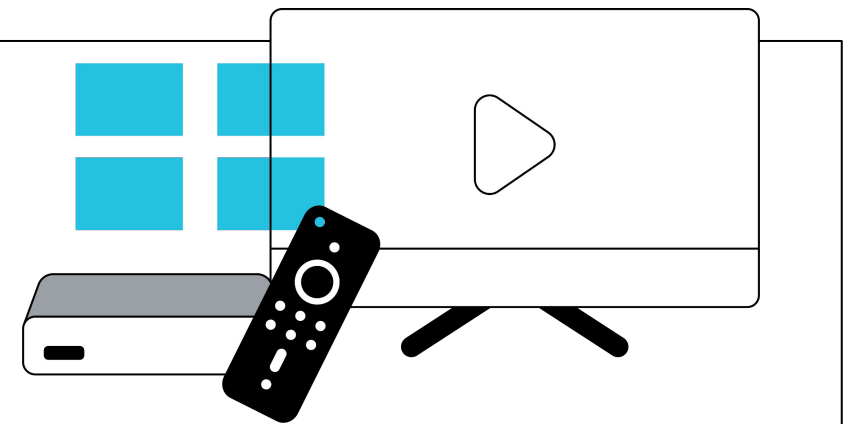
The rise of Connected TVs is fueled by the rise of OTT (over-the-top) media services

Source: The Trade Desk and Kantar, The Future of TV (Jan 2021), 3 new ways brands can connect with Vietnam this Tết 2022 (Think with Google) GWI, Vietnam, Q2 2020 to Q1 2021.

Penetration of OTT in SEA (%) and number of OTT viewers in SEA (M)

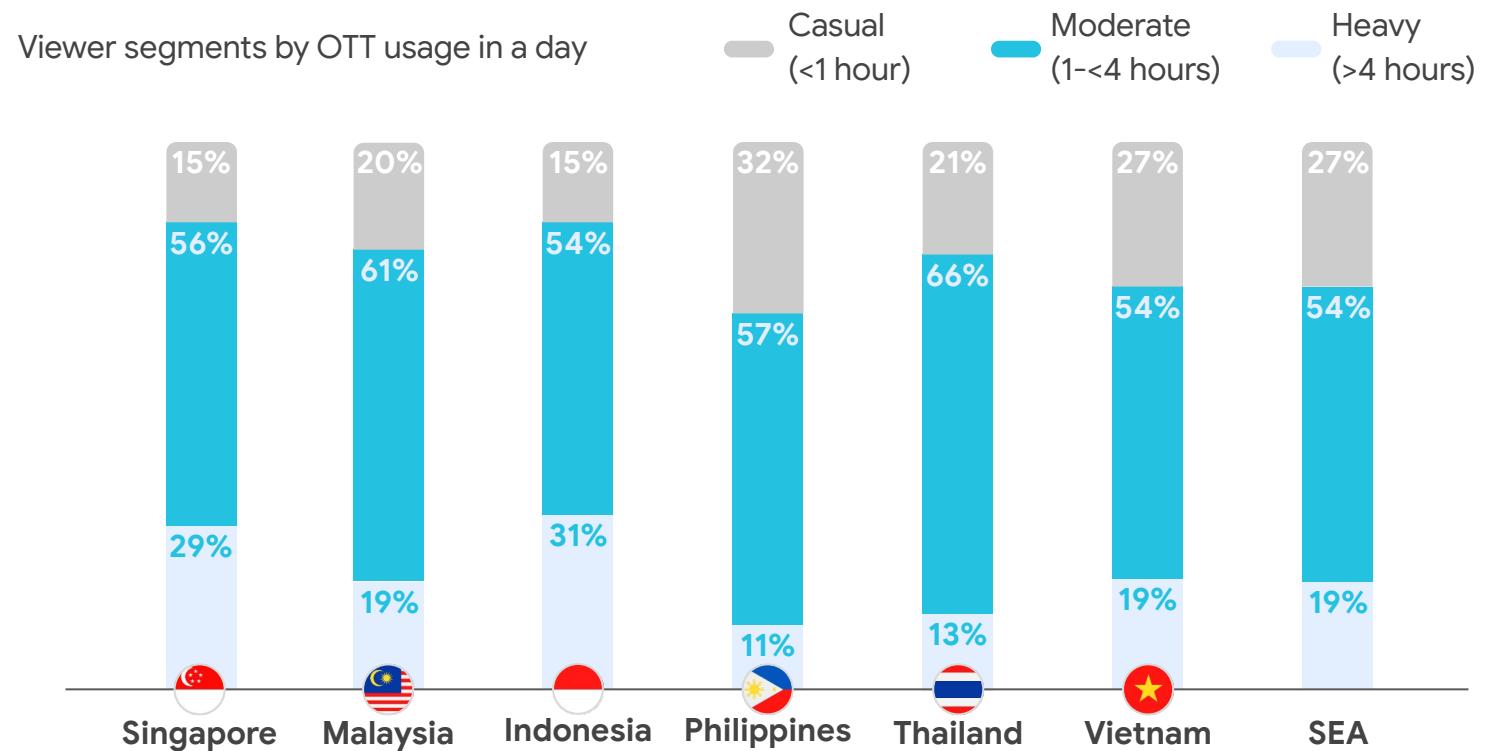
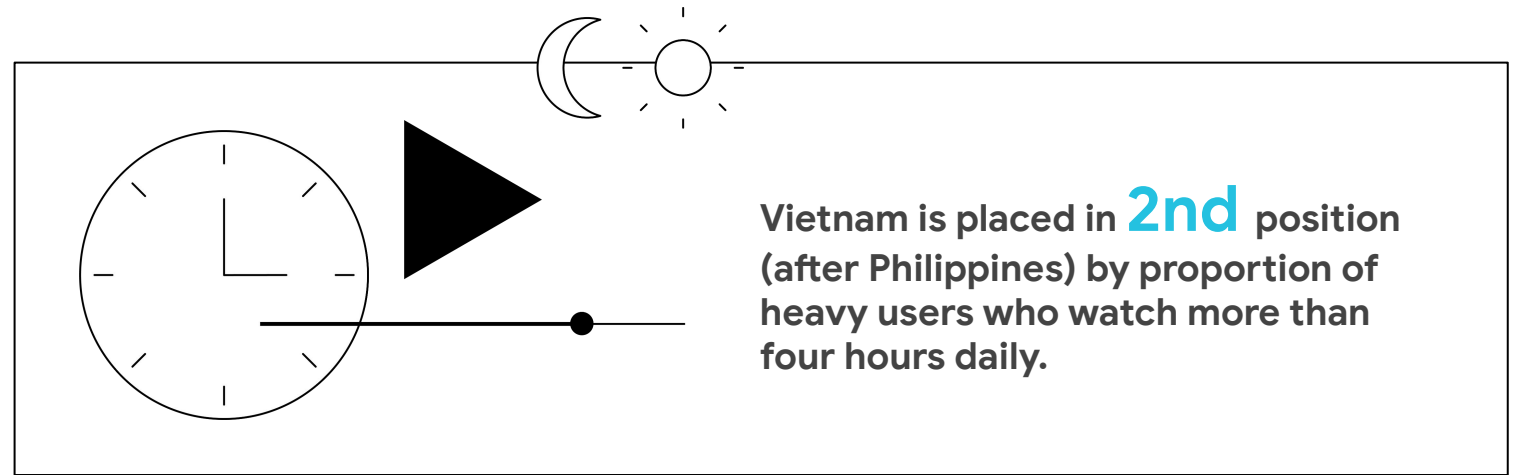


92% of Connected TV users watch online contents on YouTube as of 2020



Where people increasingly spend time indulging in OTT content

Source: The Trade Desk and Kantar, The Future of TV (Jan 2021)



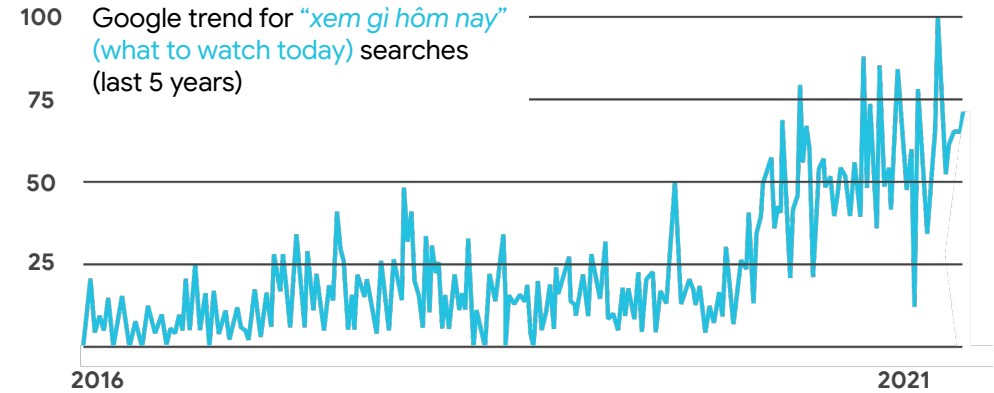
OTT's growth driven by more sophisticated audience demand, increasingly competitive landscape with both global & local players, fueled by COVID impact

Source: The Trade Desk and Kantar, The Future of TV (Jan 2021); Google Search Trend;

Rising audience demand on always-on quality contents, fueled by COVID impact

Increasingly competitive OTT market in Vietnam with both global & local players

72% of Vietnamese viewers plan to maintain or increase OTT viewing in the future



Foreign players

NETFLIX YouTube iQIYI WeTV

Local players

GalaxyPlay VieON ZTV DANET

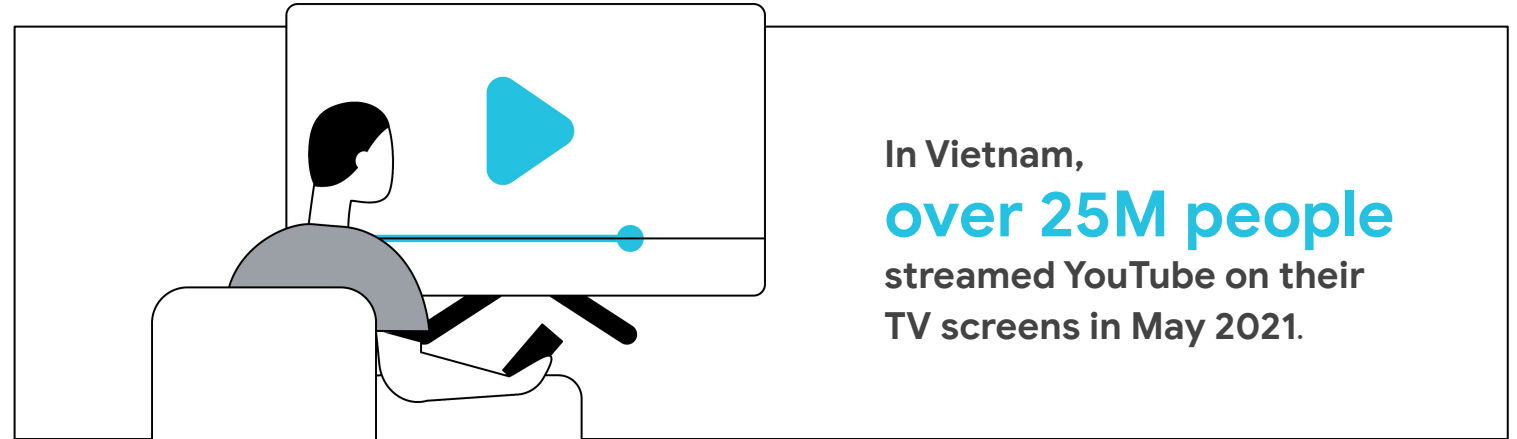
FPT Play myK+ VTV GIẢI TRÍ go

and many more

The way viewers watch TV has changed

YouTube on Connected TV is now becoming mainstream

Source: YouTube Internal Data, VN, May 2021 vs. May 2020 for YoY.
YouTube Internal Data, VN, May 2021



In Vietnam,
over 25M people
streamed YouTube on their
TV screens in May 2021.



Watch time of food content on TV screens has grown over **45%** year over year in Vietnam as of May 2021.



Watch time of humour content on TV screens has grown over **150%** year over year in Vietnam as of May 2021.



When watching YouTube on the TV screen in May 2021, viewers watched videos that were on average over 5% longer than the average of those viewed on mobile and desktop, and the average view was over **90%** longer.



Watch time of football content on TV screens has grown over **150%** year over year in Vietnam as of May 2021.



Watch time of variety shows on TV screens has grown over **200%** year over year in Vietnam as of May 2021.

CASE STUDY



Nestlé Milo unlocks incremental reach a YouTube on CTV and Linear TV campaign

The test

Nestlé Milo, wanting to promote their new packaging switch to paper straws, was keen to test if YouTube CTV can compliment their linear TV campaign and deliver incremental reach and exposure to core audience Female 25-44 on the big screen

The approach

Cross-media reach (XMR) reporting to conduct reach analysis on TV (TV campaigns) and YouTube (YouTube CTV campaign) run on core audience in Vietnam for 4 weeks

+7%

Reach (F25-44) with CTV on top of linear TV

-22%


Cost per rating point (CPRP) vs linear TV

2.6x

Expanded CTV campaign reach with co-viewing

+12%

Ad recall lift* for CTV campaign



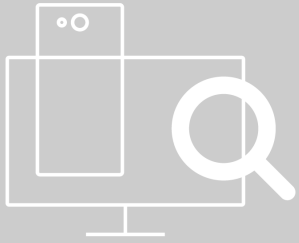
“The CTV experiment was successful in delivering on-target incremental reach and reaching other co-viewing family members. YouTube CTV is a growing trend in Vietnam and has shown its true potential in this experiment. We will continue to leverage this growing channel in the coming campaigns, with the help from our partners in YouTube”

Vu Nam Ha
Senior Brand Manager, Milo Team



PUBLICIS GROUPE

*Brand Lift conducted when the YT CTV campaign was airing independently.



**Beyond
Mobile**

with

Connected TV



**Beyond
Awareness**

with

Active Shopping



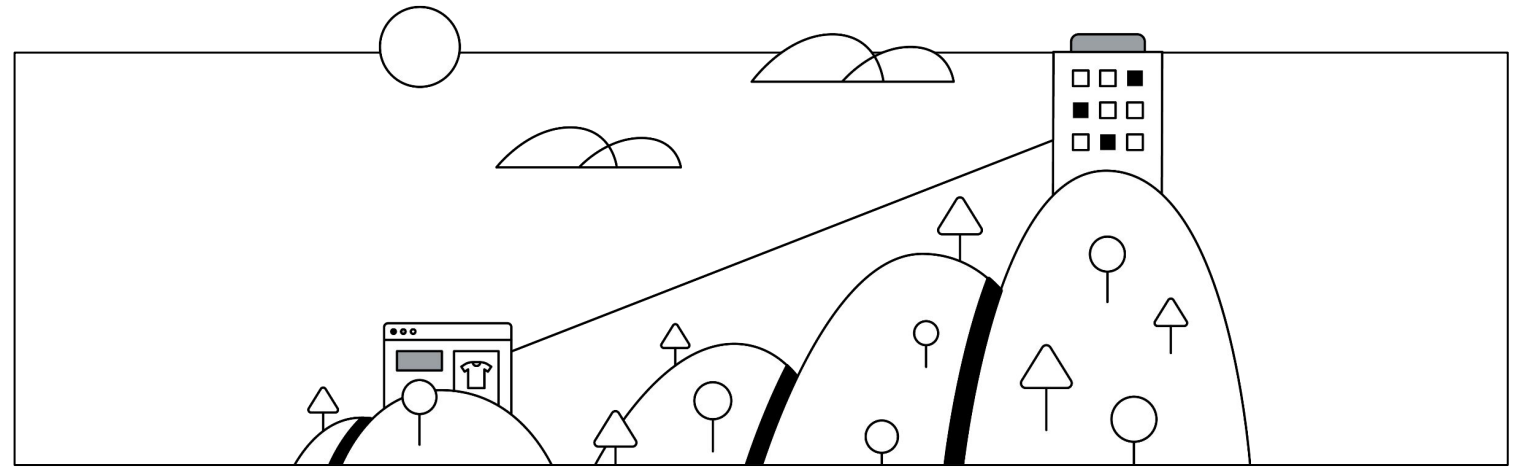
**Beyond
Metro**

with

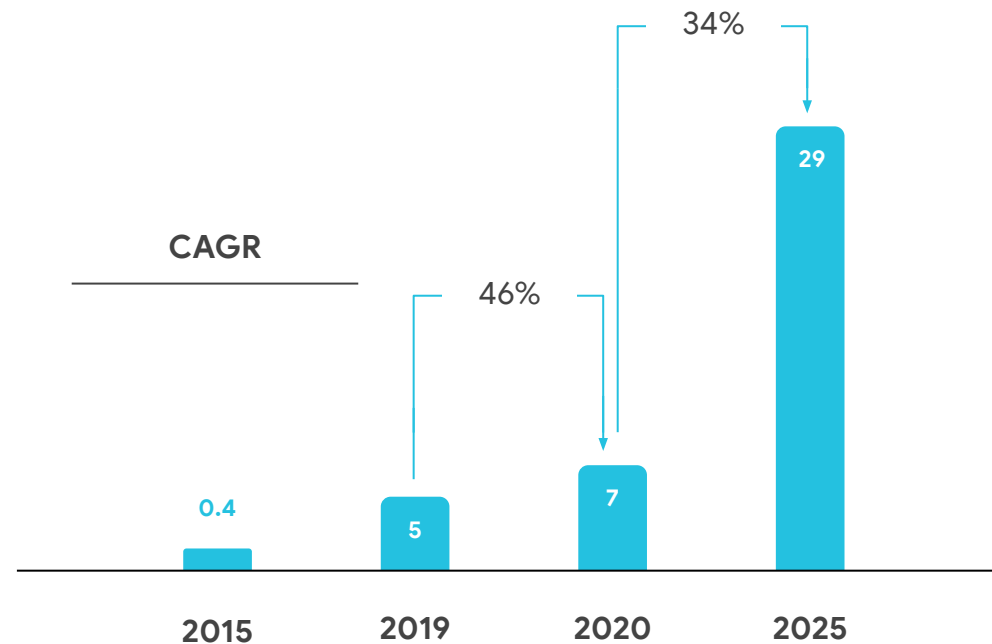
Sub-location

E-commerce is expected to grow at 34% CAGR from 2020 to 2025

Source: e-Conomy SEA 2020 report



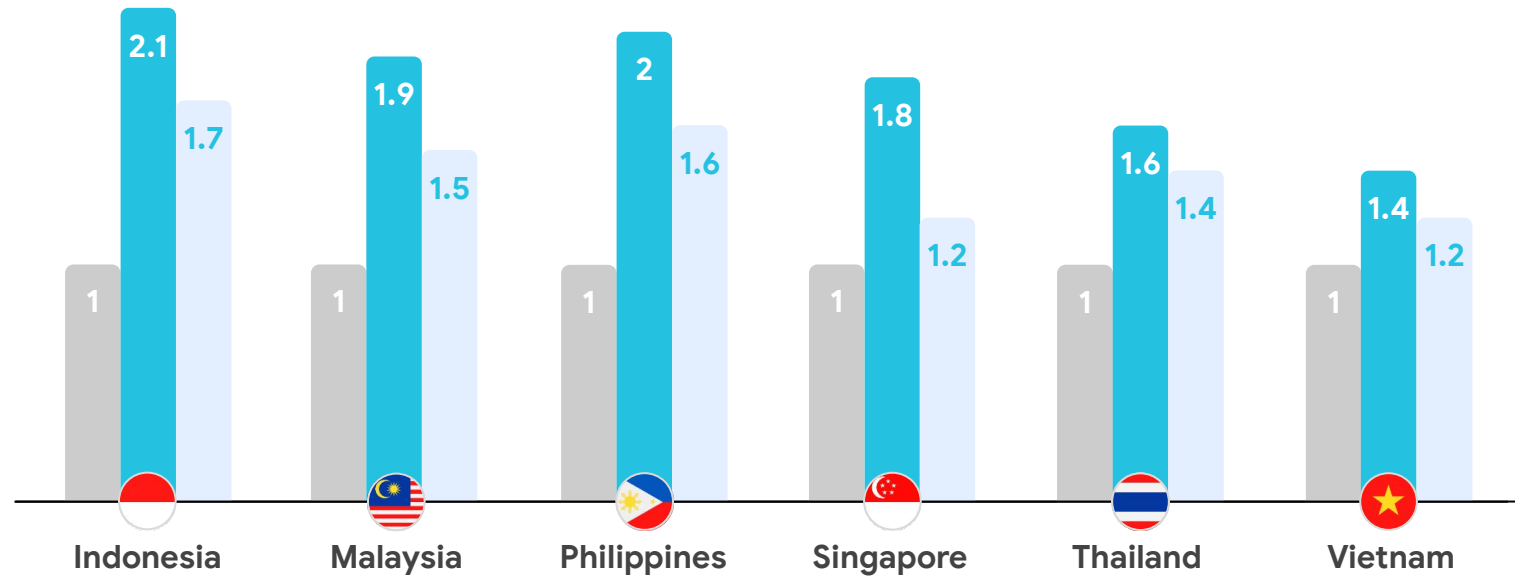
Vietnam e-Commerce GMV (\$B)



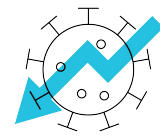
Lasting adoption of e-commerce is expected across regions

Usage of e-Commerce before, during and after COVID-19 lockdown, indexed to pre-COVID-19 levels

Before During After

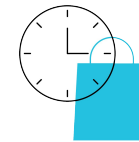


R3a. Before COVID-19, how much did you purchase ECOMMERCE online (e.g. app/website)? R3b. During COVID-19, how much did you purchase ECOMMERCE online (e.g. app/website)? R3c. Which of the following best describes the way you will purchase ECOMMERCE after COVID-19 is over? Based on the response of those who answered, "often/always purchase online" Base: e-Commerce (Consumer Electronics, Apparel & Beauty) Vertical: SEA n=3754, SG n=647, ID n=750, MY n=542, VN n=687, PH n=561, TH n=567 Source: Kantar, [e-Conomy SEA 2020 report](#)



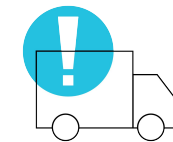
49%

of new users cited 'decreased exposure to COVID-19' as the reason to shop online



47%

on average cited 'save time and energy' as the top reason to shop online

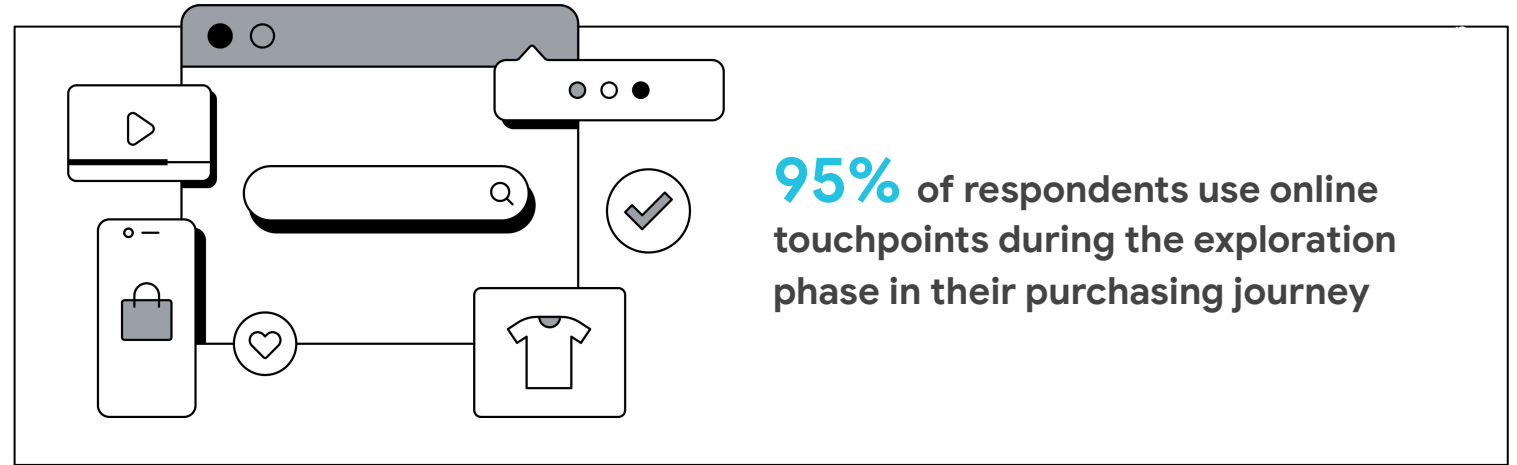


40%

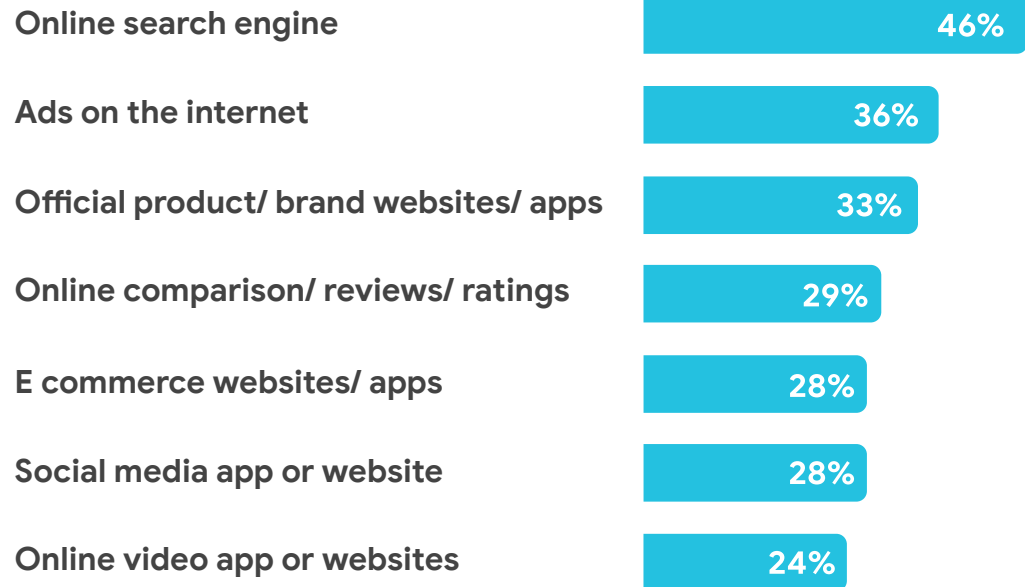
cited 'issues with delivery' as the top barrier to using e-Commerce

Now, online touchpoints have become the most popular sources of information to plan and explore products and services

Source: Source: Kantar's Shopper Pulse; Question: *Which sources of information did you use when you started to plan & explore while deciding on the product/service to purchase?; (Vietnam, April, June, August 2021; n = 3033)



Search engines & Brand websites apps are the most used sources among online touchpoints



Marketers should consider various online touchpoints and have a balanced strategy for cross-channel retail when approaching online shoppers along their journey

Social media, search, online video sites and marketplaces are great platforms to advertise to Vietnam shoppers

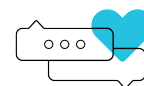
Source: Shopper Pulse APAC Wave 1 and 2 2021 (April, June & August 2021)
B10. You mentioned seeing Online Ads about the {A6_TEXT} while planning and exploring. Where did you see the online ad?
Base: Those who referred to online advertising during their initial research: VN n=704

Online ads seen



of the **1 in 3** (36%) Vietnamese shoppers who referred to online advertising during their initial research...

Platform advertising seen on



Over 1 in 2

(57%) saw ads on social media or chatting apps



1 in 2

(51%) saw ads on search engines



Over 4 in 10

(44%) saw ads on online video sites



4 in 10

(39%) saw ads on e-commerce websites/apps

CASE STUDY



Driving online sales for Samsung Mobile Phones & TV through Google's Retail Partnerships

SAMSUNG



Challenge

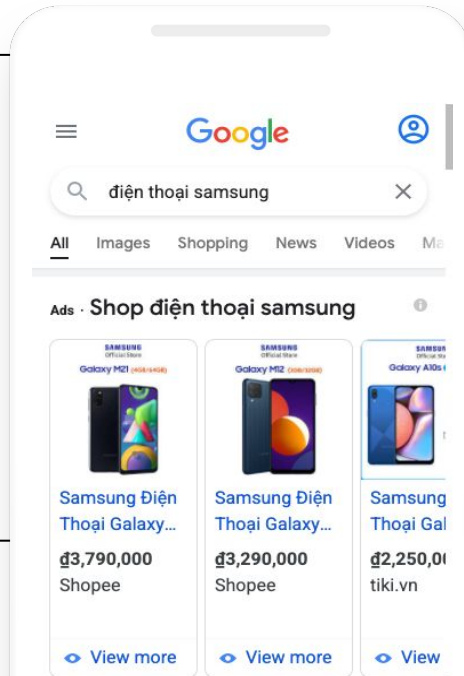
Prompted by a flight of users to eCommerce in the wake of the pandemic, Samsung sought to expand to new online revenue streams. Through the Retail Partnerships with Google program, Samsung partnered with top Vietnamese marketplaces Shopee and Tiki, to help drive more incremental sales with suitable ROI across their stores on the eCommerce platforms.

Mobile phones 

990% ROAS +32% conversion rate

Televisions 

636% ROAS



“We are very happy to be the first tech brand in Vietnam to participate in the Retail Partnership with Tiki through Google Ads. The combination of Google shopping solution and Tiki platform signals deliver outstanding campaign performance and we look forward to more of such collaboration in the future.”

Brian Ha Minh Tam

AV Online Head, Samsung Vietnam

CASE STUDY



L’Oreal Vietnam enhances their always-on ecommerce campaigns across platforms with Google Ads to drive leads and sales to L’Oreal Store on Shopee

L’ORÉAL



Approach

A full funnel approach with Video Action Campaigns and Discovery Ads for leads, and Smart Shopping Campaign for sales

Results & Learnings

- Strong always-on ROAS performance across all solutions, esp. driven by Smart Shopping
- YouTube & Discovery Ads drove strong engagement and therefore proved their assistive value for ecommerce campaigns

1.9

Campaign Sales ROAS (Apr 10 - May 17)

1.4X

CTR vs. VN Benchmark

2.1

Smart Shopping ROAS (Apr 10 - May 17)

2.2x

Vs. Standard Shopping ROAS (Apr 10 - May 17)

Multi-format for Shopping

The image displays three smartphone screens illustrating different advertising formats for L'Oréal products:

- Smart Shopping:** Shows a grid of product images on the Shopee platform with a search bar at the top.
- YT + Feed:** Shows a video ad on a YouTube feed featuring three women and the text "Bộ ba làm đẹp thần thánh!".
- Discovery:** Shows a video ad on a YouTube Discovery page with a red background and the text "LAN DA CANG MIN SONG SAC Chien NỮ".

“At L’Oreal VN, we are thrilled to pilot these new ecommerce solutions from Google as we believe they are innovative at the crossroad of consideration and conversion which come as a great addition to existing tools.”

Guy Pierre-Olivier
Chief Digital & Marketing Office,
L’Oreal Vietnam

CASE STUDY



Unilever Cleanipedia exploring lower funnel and collecting Data Acquisition & Distribution (DAD) by utilizing Performance Max, driving leads at large volume and efficient price



Cleanipedia

MINDSHARE



Approach

One of Unilever’s main objectives this year is to acquire sufficient PII/DAD and enrich data quality for better segmenting and targeting. This translated into campaign’s goal to generate customer leads through the giveaway form hosted on the Cleanipedia website.

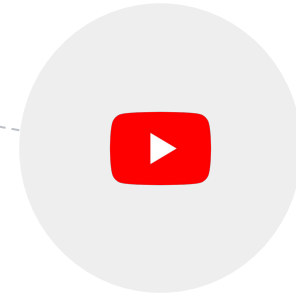
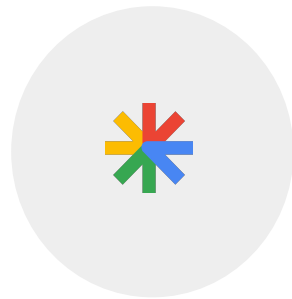
Results & Learnings

- Started out with Discovery and TrueView for Action campaigns running simultaneously for awareness and consideration
- Leveraged Performance Max (PMax) to drive the desired action - lead signups
- Used performance-driven audience segments including Customer list, Custom intent and Past website visitors audience to help feed the ML

-22% Cost Per Lead

+23% Lead Volume

160% KPI Volume



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CASE STUDY



Outride Anything Utilizing location-identifying service and Geo-targeting approach to reach the relevant Grab drivers



Objective

To support Grab drivers with a discounted oil change during COVID city lockdown using location-identifying service and geotargeting.

Methodology

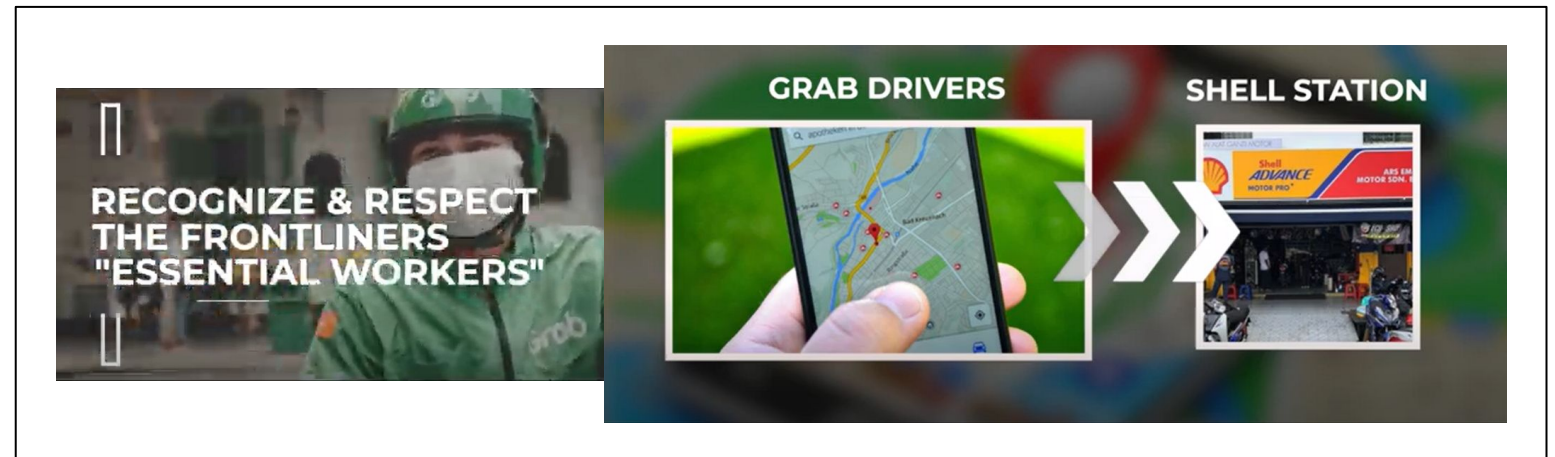
Using location-identifying service and Geo-targeting approach to reach out to the relevant GrabBike drivers. The app helped indicate whether they are more likely to visit a workshop based on the area they are around

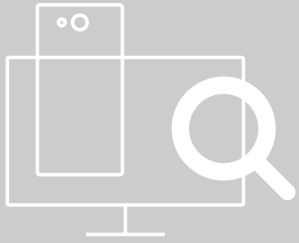
Leverage Shell Advance native image ad and video ad with a discount coupon to avail in their following oil change, valid only at the nearest workshop of Shell Advance. The geo-targeting helped the brand in maintaining the record of business sales

2.5M Grab drivers reached

225% Clicks delivered

200% ROI





**Beyond
Mobile**

with

Connected TV



**Beyond
Awareness**

with

Active Shopping

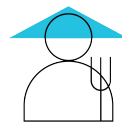
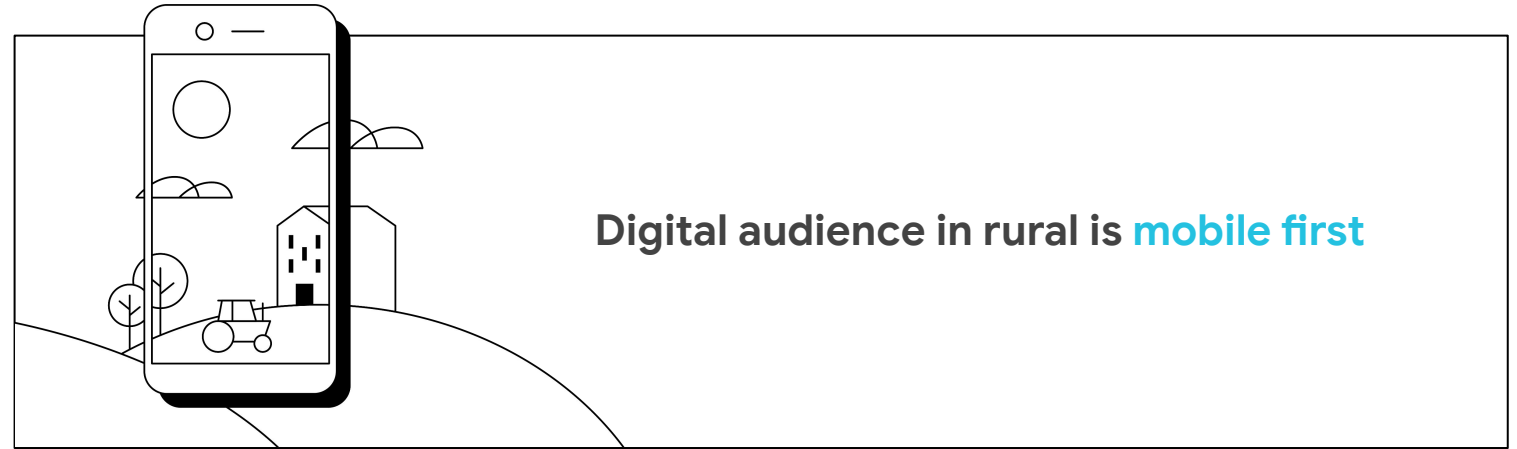


**Beyond
Metro**

with

Sub-location

Beyond Metros in Vietnam represent a substantial, largely untapped opportunity



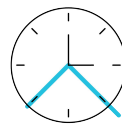
70%

Vietnamese population is rural



77%

of rural have Internet Access



91%

of online rural access Internet multiple times per day



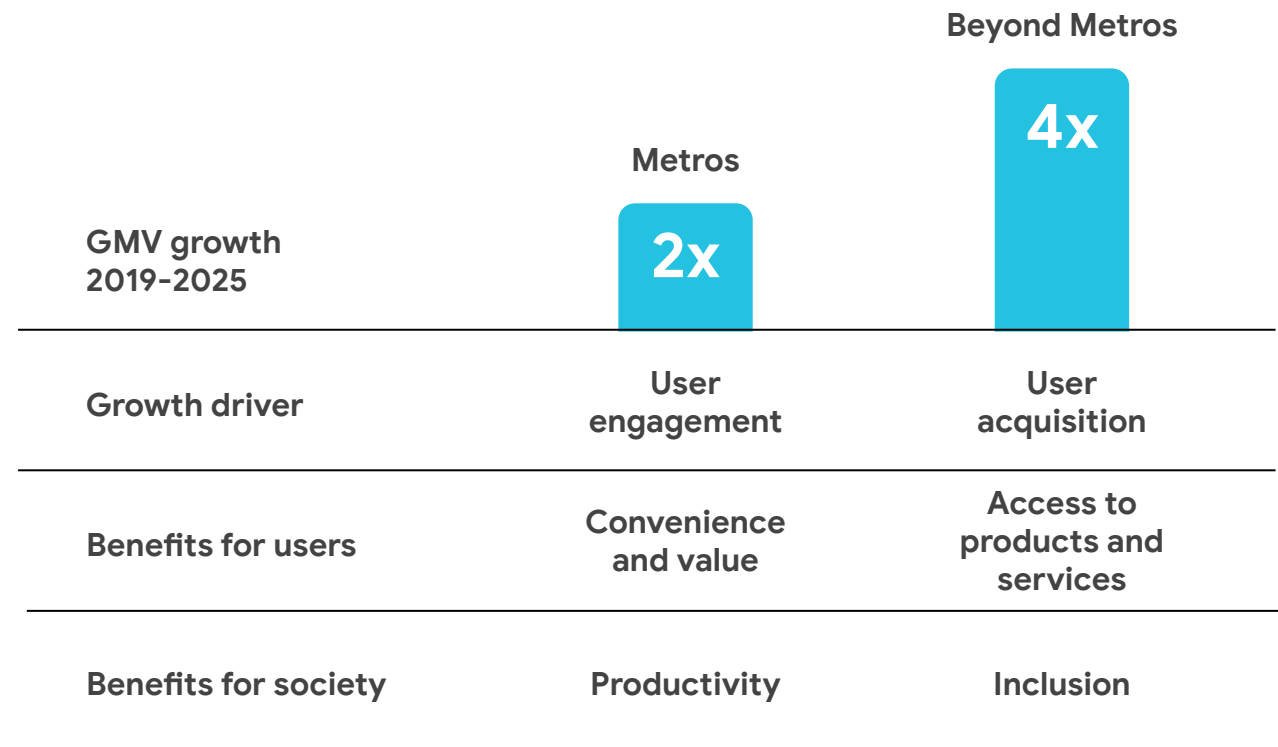
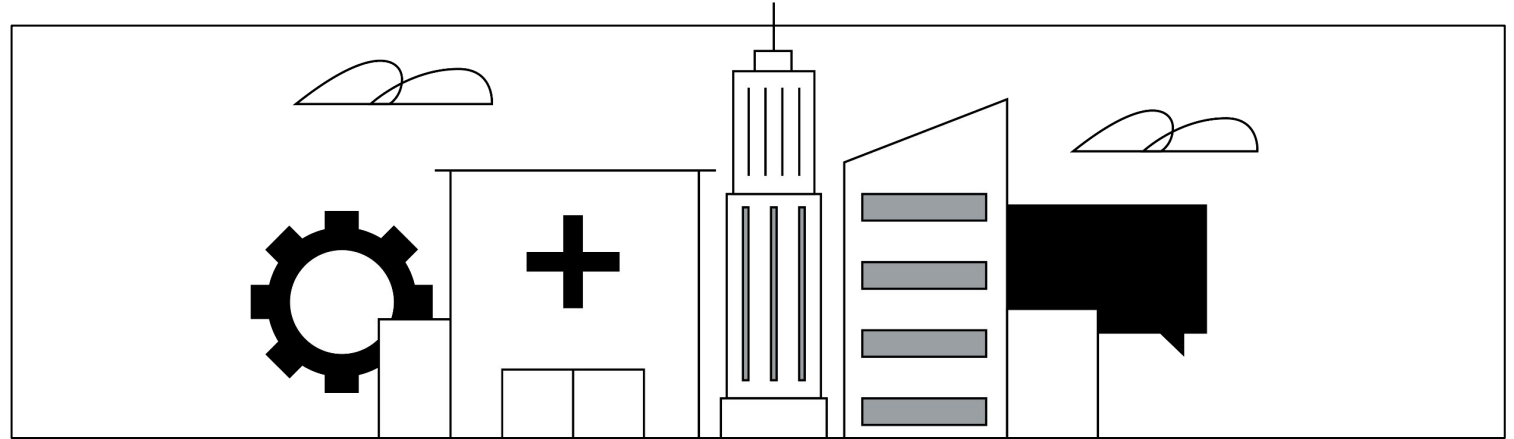
87%

with Internet access use smartphone as their primary online device

Source: World Bank, April 2018; Consumer Barometer, 2017; YouTube Profiling, Vietnam 2018

Beyond Metros poised to **grow** **twice** as fast as Metros

Source: e-Conomy SEA 2019 report
Metros are defined as Hanoi, Ho Chi Minh City, Da Nang and Can Tho; Beyond
Metros are the remaining cities

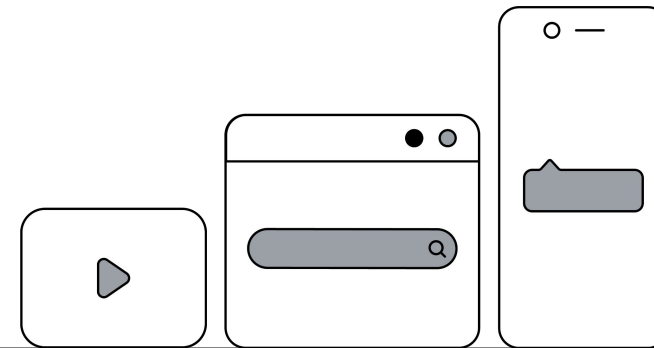


Non-metro areas are increasingly consuming media online

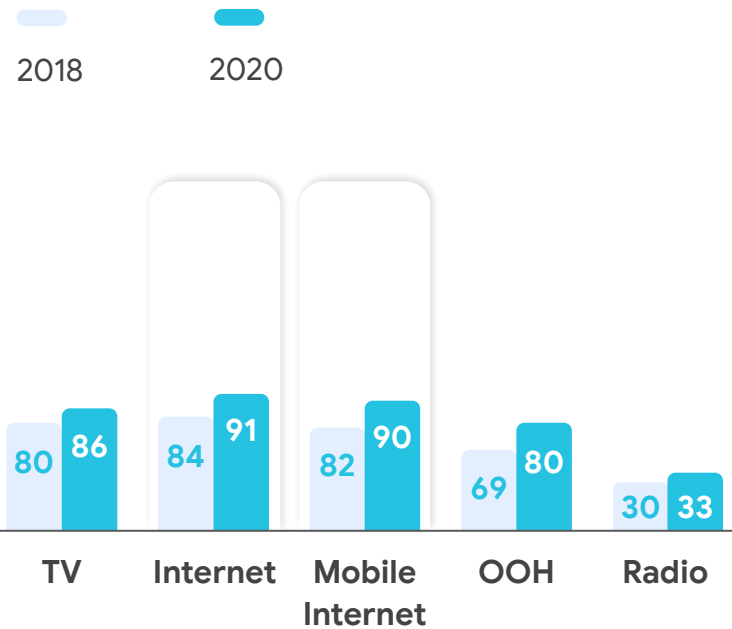
Contrary to the assumption that consumers in rural Vietnam are unfamiliar with non-traditional media, our research shows that there is increasing use of digital media consumption across multiple channels.

For the first time ever, Internet has surpassed TV in both penetration and time spend.

Source: GroupM Vietnam Touchpoint 2020

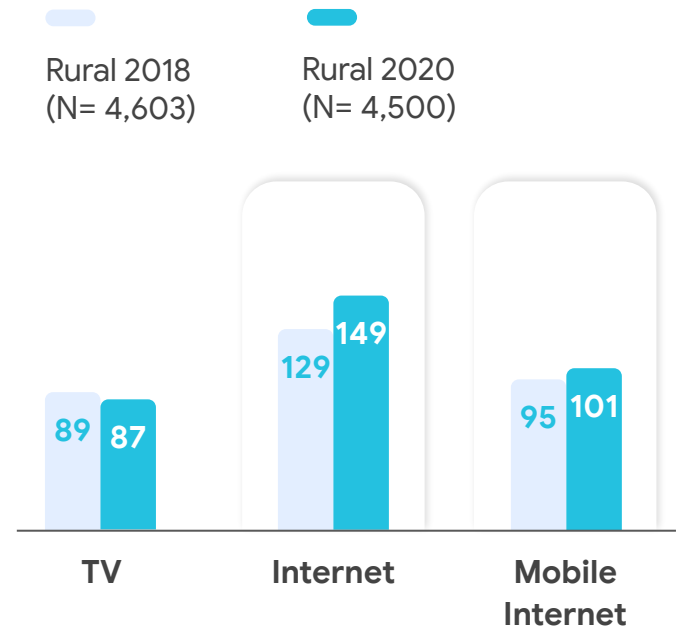


Media Penetration (%)



Base: Total respondents (N= 4,500)
Have you watched/ read/ listen/ been/ accessed... in the past 7 days (survey taken in Sep 2020)

Average minutes per day (minutes)



Base: Total respondents (N= 4,500)
How many hours do you spend on TV/ Addressable TV/ Newspaper/ Magazines/ Radio/ Internet?

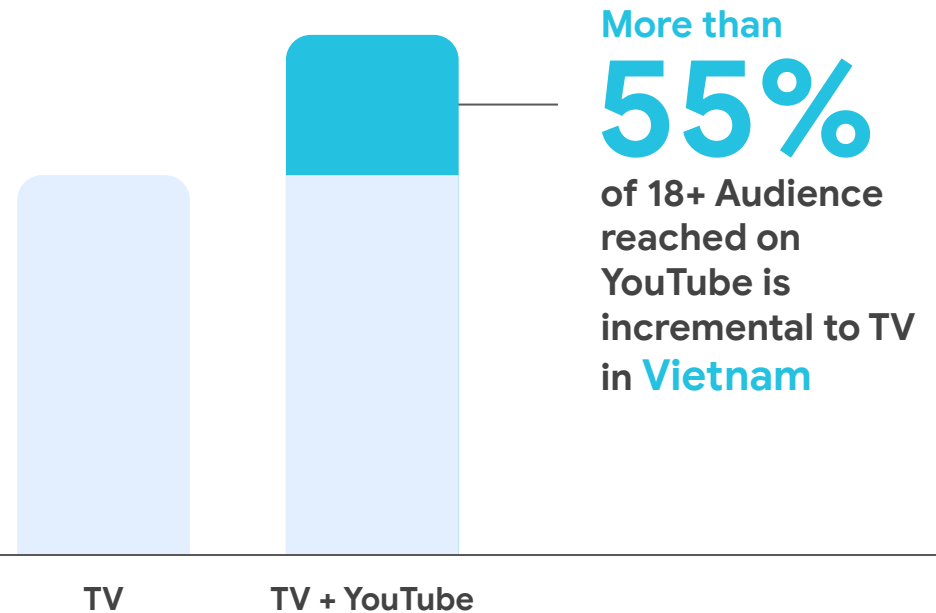
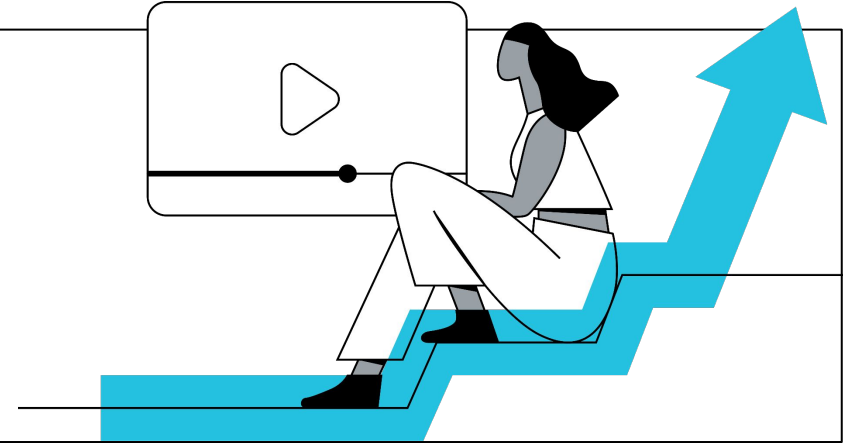
Making Digital a vital channel alongside TV to reach more target consumers



XMR reports are statistically calculated model of TV, YouTube and overlapped reach, frequency, spend and TRPs where TV measurement data is from market currency providers like Nielsen, the YouTube data is from Google's Unique Reach reporting solution inclusive of YouTube campaigns across all platforms, including Google Video Partners, and overlap is calculated using Google's Conditional Independence methodology (white paper published and approved). Duplicate reports have been removed.

Source: Google meta-analysis of cross media reach reports from Google's Cross-Media Reach Reporting solution (XMR) where TV measurement data is from Nielsen, Vietnam n = 423, January 2020-May 2021

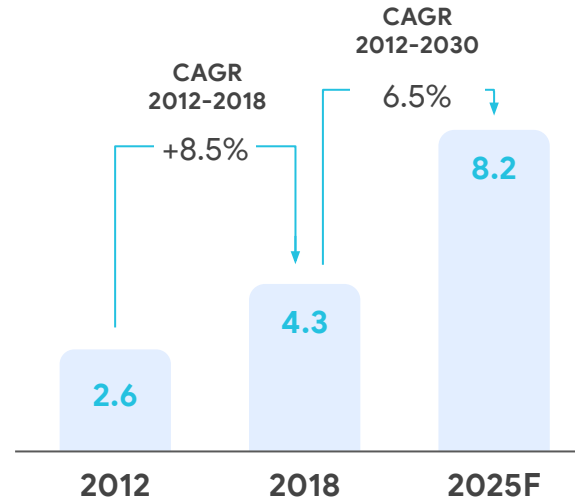
More than **30%** of 18+ year old audience reached on YouTube was incremental to TV in SEA



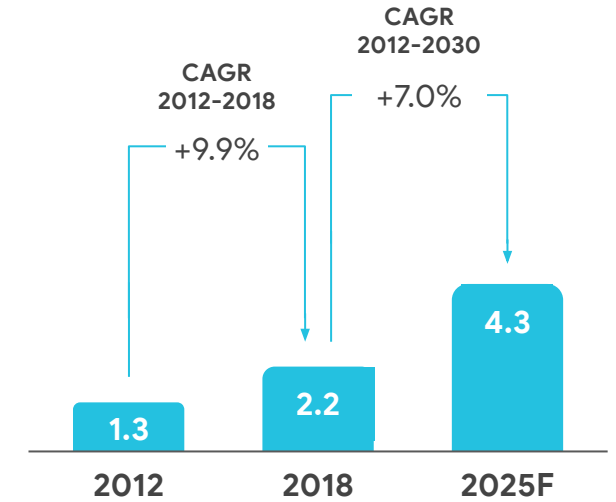
Consumers' purchasing power continue to increase, especially in non-metro areas

Source: Kantar Worldpanel Vietnam Insight Handbook 2020

Urban 4 key cities



Non-metro areas



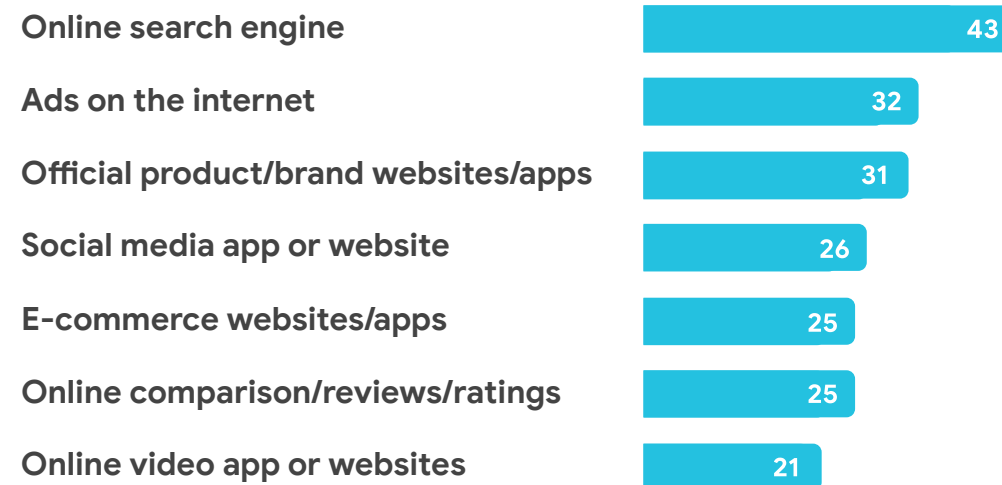
Search engine is the most common among online touchpoints for non-metro shoppers to research and find information about products/services before purchase

Source: Kantar's Shopper Pulse; Question: (*) Which sources of information did you use when you started to plan & explore while deciding on the product/service to purchase? (Vietnam, April, June, August 2021; n = 3033, non-major metro cities); (**) What type of information were you searching for or that you happened to notice? (Vietnam, April, June, August 2021; n = 742, non-major metro cities) Major metro cities are Hanoi, Ho Chi Minh City, Da Nang and Can Tho; Non-major metro cities are the remaining cities in Vietnam

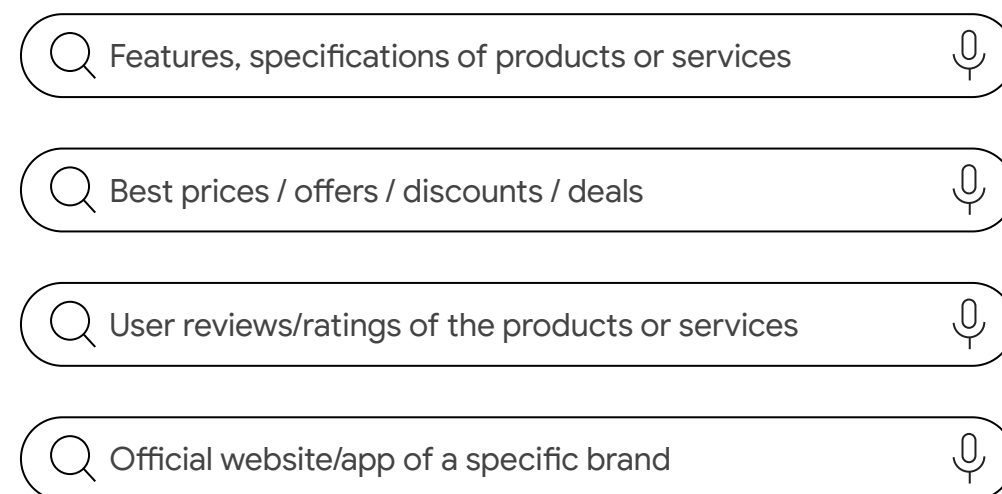
93% of respondents use online touchpoints during the exploration phase in their purchasing journey*

Online shoppers use search engines to find various topics of products, services or brands**

Top online touchpoints for non-metro shoppers*



(numbers are in percentages)



CASE STUDY



A TV + YouTube complementary media approach can help brands unlock significant incremental unique reach efficiently, and drive brand impact with core audiences



Objective

Measure incremental reach, efficiency and impact of YouTube on top of TV campaigns

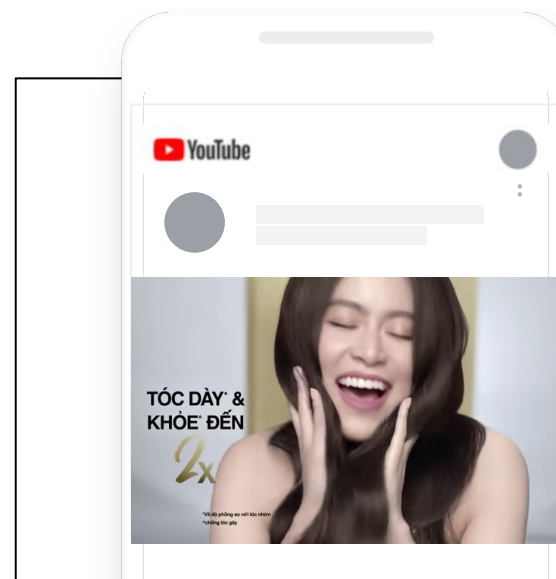
Methodology

- TV: TV campaign
- YouTube: TrueView for Reach (50%), Trueview Non-Skip (50%)

Both the TV and YT campaigns ran in Northern Midlands Vietnam for 8 weeks in Q4 2020, targeting female audiences aged 18-34. Cross media reach reporting measures the probability of each user being reached 1+ times across TV + YT media campaigns, showing the incremental unique reach of YouTube.

up to
+53% Incremental Reach on top of TV campaign

+12.4% Ad Recall Lift



“Winning in rural is important for all MNCs and an effective media strategy plays a vital role for any brand entrepreneur in Vietnam. To our case, we concluded Youtube successfully increased quality incremental reach and brand/business metric, then Youtube will play an important role for P&G branding campaign in future.”

Tommy Nguyen

Senior Media Manager, P&G VN

CASE STUDY



The Mekong Connection - Understanding the High Penetration of Mobile devices and Partnering with Telco to truly expand Rural exposure



*BPS is referred to as Basis Points
Source - GroupM

Objective

Dishwashing detergent brand Sunlight used a multi-pronged campaign to encourage reappraisal and win over rural consumers from the local brand in Vietnam.

Methodology

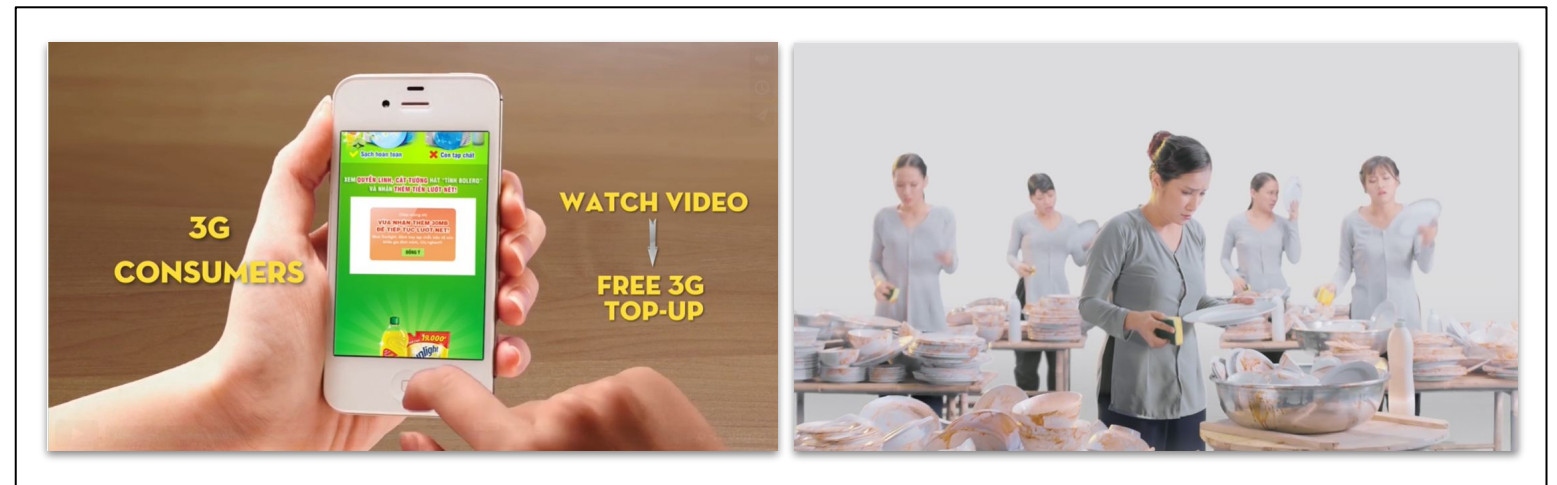
Marrying consumer behaviour (comedy content consumption) with clever location-based targeting using a telco partnership, Sunlight was able to serve its message at precisely the right time and effectively communicate its end benefit.

Sunlight sales grew by 25%, allowing it to overtake the local brand and become number one in both urban and rural areas of Mekong Delta for the first time

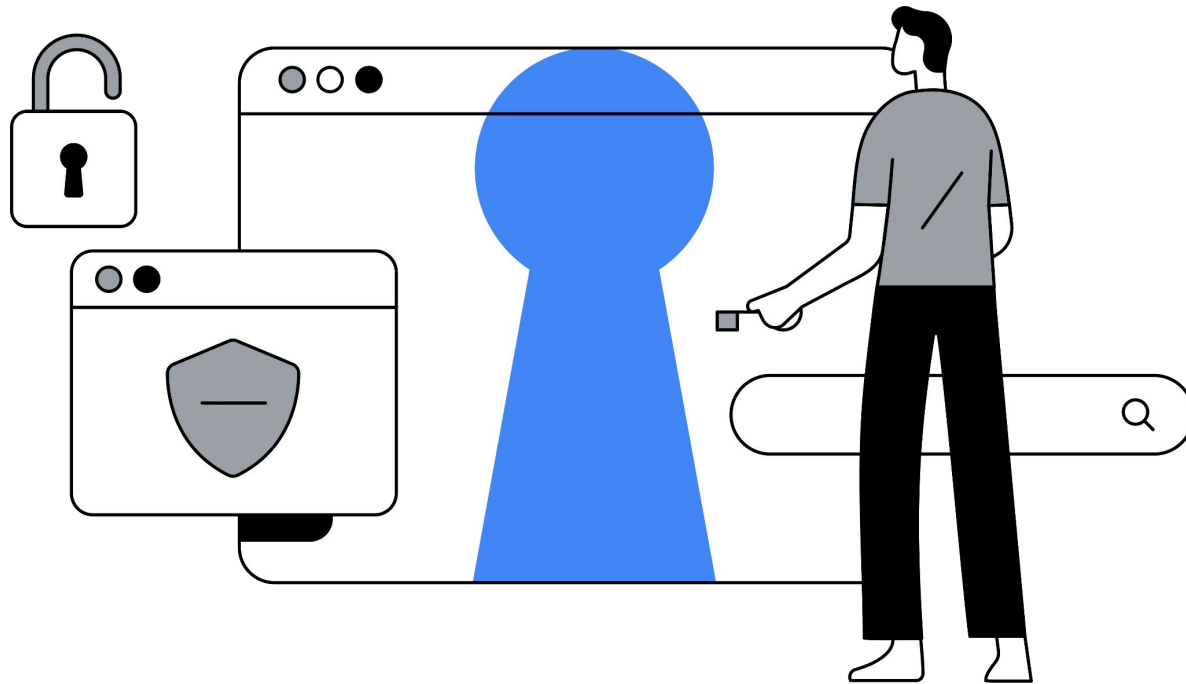
1.6M Women in rural reached

+23% Penetration by BPS* in rural

160% Sales increase in MKD



4

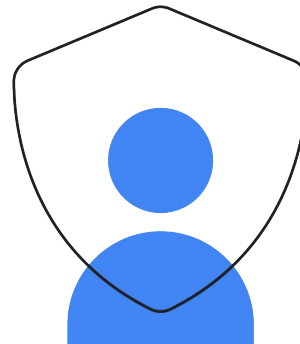


**The power of
preparing now -**
Steps businesses
can take today to
prepare for a
privacy-first future

People are increasingly aware of the importance of privacy and how their personal information gets collected and used

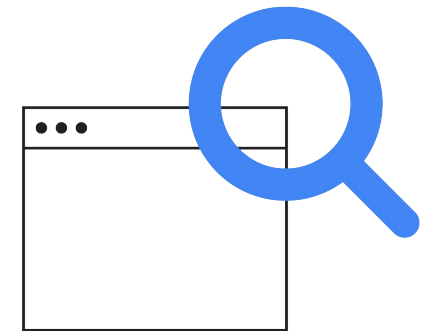
48%

of people globally have stopped buying or using a service from a company due to privacy concerns



4 out of the top 5

countries that searched for online privacy (in English) were from APAC



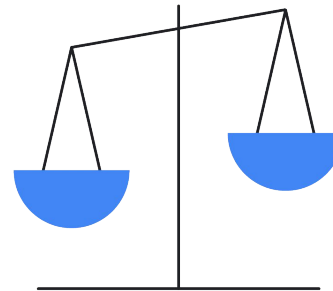
Source - The Digital Tipping Point 2019 Retail Report from Womble Bond Dickinson; Google Trends, July 9, 2021

New privacy regulations and technology platforms are changing the ways user data is collected, shared and measured, providing users with greater transparency and control over their privacy

Source - [The Power of Preparing for a Privacy-first Future](#)

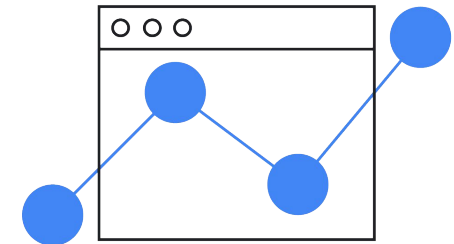
Regulatory Changes

Regulations are impacting how data can be collected and used



Technology Changes

Increased restrictions are impacting traditional data collection (e.g. third party cookies and Mobile Advertising IDs)



Suggested steps to improve your approach to data privacy, while still delivering business results.

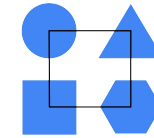
Collect and manage user data responsibly and transparently

Source - [The Power of Preparing for a Privacy-first Future](#)

Advertisers

Publishers

Collect



Consider what a first-party data strategy looks like for your business. Think about the **value exchange** you are offering users in return for sharing their data.

Collect and manage user data **responsibly** by providing clear privacy policies and ensuring that you offer users **transparency, choice, and control**.

- Implement durable **tagging solutions** (across your websites and apps) and leverage **first-party data, and CRM data** for personalized marketing.
- Improve first-party data usage by adding **more data sources**, fresher data, smarter
- Audit your **advertising & data partners** to ensure privacy-first policies.
- Implement a Customer Data Platform (CDP) or Data Management Platform (DMP) to **collect and store audience data** for use downstream.
- Pass **first-party signals to buyers** to increase monetization value.

Suggested steps to improve your approach to data privacy, while still delivering business results.

Ensure proper tracking and measurement setup

Source - [The Power of Preparing for a Privacy-first Future](#)

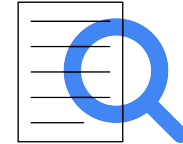
Advertisers

- Be flexible with how you **measure results** and use the insights to understand what matters to your users.
- Use automation and machine learning solutions to **model conversions** to fill in the gaps in data.

Publishers

- Use the data to **understand user engagement** with content, produce more of what works.
- Use your data to **segment your audiences** and optimize their experiences.
- Leverage audience segments to **monetize effectively** across both ads and other revenue-generating solutions (e.g. subscriptions).

Analyze



Proper tracking and measurement can help ensure that you're seeing a **representative view of performance across channels**, letting you **generate insights and adjust your strategy** accordingly.

Suggested steps to improve your approach to data privacy, while still delivering business results.

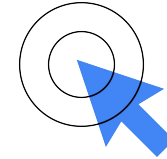
Modeling and automation help to maximize your own data

Source - [The Power of Preparing for a Privacy-first Future](#)

Advertisers

Publishers

Activate



Modeling and automation help to **maximize your own data** by augmenting what user data is available and capitalizing on other available signals.

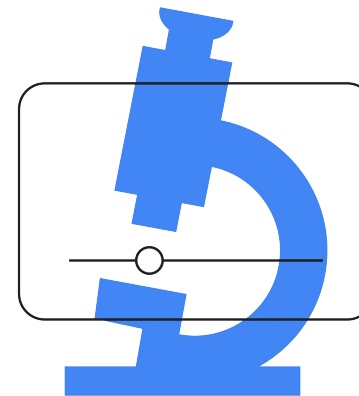
- Manage and align your data & ad platforms & cloud infrastructures, so that you can use machine learning to **analyze the data for insights / predict outcomes**.
- Ingest anonymized audience segments from your CDP or DMP into Google Ad Manager using Publisher Provided Identifiers (PPIDs).
- Consolidate and secure your data in Google Cloud, so that you you can use machine learning to **predict outcomes and optimize revenue** without compromising user privacy.
- Leverage **Privacy-forward ads solutions** to monetise content, such as Publisher Provided Identifiers, encrypted signals, and contextual signals using Key-values.

Be ready to adopt privacy- preserving technologies

Experiment and be ready to adopt privacy-preserving technologies

Work with your agencies/in-house teams or local industry bodies to contribute to the development of the [Privacy Sandbox](#). This is an open-source effort to develop new and more private advertising technologies (using techniques like aggregation, anonymization, on-device processing, and others) to select the right ads for people, protect them against fraud, measure results effectively, and protect businesses against ad fraud.

[How to get involved!](#)



Source - [The Power of Preparing for a Privacy-first Future](#)

CASE STUDY



Swiggy leverages Ads Data Hub & Google Marketing Platform (GMP) to drive marketing efficiencies and higher ROI



Source - Level up: Lessons from leading APAC brands on how to reach 'multi-moment' marketing maturity. Think with Google May 2020

1

Swiggy leveraged Ads Data Hub to join media data (YouTube, Display & OTTs) with CRM data to get a complete user journey view with Resettable Device Identifiers (RDID)

2

Measured sales and brand (custom surveys) metrics across their own micro-segments against ad exposure, order frequency, order value and demographics

3.5X

Increase in sweets' orders across Swiggy in comparison to festive season in 2018

7.1%


More users likely to order sweets from Swiggy post 2+ exposures across 3 video platforms

42%

Increase in sweets' % GMV contribution to overall Swiggy Orders versus 2018

7.5%

More users likely to buy sweets online post 2+ exposures on YouTube



“Ads Data Hub has significantly helped Swiggy to mould its data-driven marketing efforts. We can plan and measure digital media with higher levels of confidence post integrating ads data with our own analytics.”

Umesh Krishna
Brand Marketing & Head of Media, Swiggy

CASE STUDY



Predictive insights helps L'Oreal reach people most likely to purchase in stores

L'ORÉAL

Source - [First-party data playbook for marketing: A guide to inspire APAC brands](#), Think with Google, Nov 2020

L'Oreal's Google account team used Google Marketing Platform and Google Cloud to focus L'Oreal marketing campaigns to reach only the highest potential customers who were likely to purchase in stores, to ensure the campaigns were reaching the right audiences and converting into in-store sales

- L'Oreal analyzed data in BigQuery with website data from Analytics 360 and internal data without any personally identifiable information
- Then using AutoML, L'Oreal was able to predict which site visitors would go in-store to purchase
- Those audiences were easy to share with Google ad products Display & Video 360 and Google Ads
- L'Oreal even discovered new audiences through Similar Audiences and the Audience Expansion feature in Google Ads.

2.5X Increase in CTR

2.2X Higher ROAS

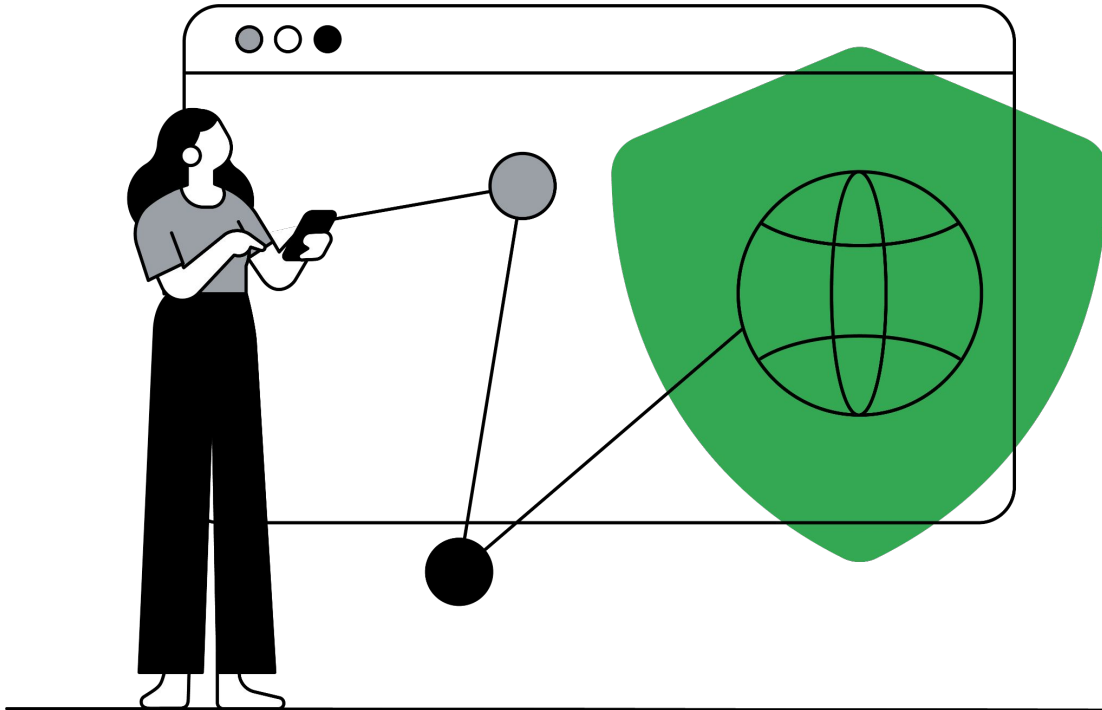


“Google Cloud helped us automatically determine which visitors are most likely to later purchase in our stores.”

Mandy Hon

Chief Digital Officer, L'Oreal Luxury Division in Taiwan

5



How brands put AI, Programmatic, and APIs to advance on the digital maturity journey

CASE STUDY



Real-Time Infection Alert System Utilizing Machine Learning and AI to boost Rural Expansion



Source: GroupM

The challenge

The brand faced two challenges: 1) the news of outbreaks only came once the disease had already infected people and 2) Vietnamese mums had the mindset to prefer cure over prevention

The approach

Based on historical correlation between disease outbreak pattern, weather data and search signal, Lifebuoy created a real-time forecast of upcoming disease outbreaks and alerted mums via their mobile phones.

3.5M

Moms alerted in the first month

500+

Penetration by BPS in rural

20%

Increase in sales nationwide

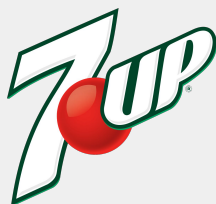


CASE STUDY



Weather API Campaign

Created weather API script and ruled it to different variations of campaign promotion responses depending on the current temperature in Ha Noi and Ho Chi Minh city



The approach

7UP Summer is the example of initiating a Beyond-Media campaign - closing the loop with predictive inputs, creating excitement with its creativity. Real time temperature trigger and city level (Ha Noi & Ho Chi Minh)

HOT campaign = Above 28oC in Ha Noi → rule ON with promotion campaign only for Ha Noi (Video + Display)

HOT campaign = Above 28oC in HCMC → rule ON with promotion campaign only for HCMC (Video + Display)

NO ACTION campaign = Below 28oC → rule OFF all campaigns

Customized creatives for each city and weather targeted to further increase relevance.

The rest of country running iTVC campaigns (Video) without rule

15.8M

Reach

12.4M

Views

82.5%

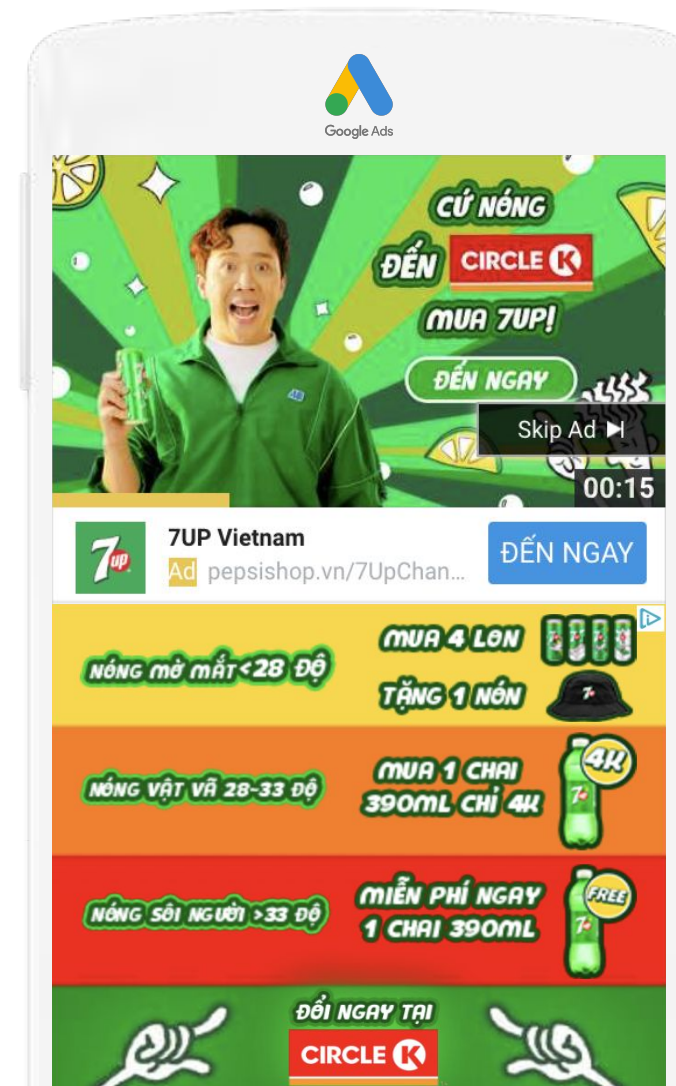
Arrival Rate

3.7x

Cheaper CPC

2.5x

Cheaper CPV



CASE STUDY



SPVB reached more unique users at a 37% lower CPR than industry benchmarks with programmatic campaign



The challenge

SPVB challenged Mindshare and Google to deliver their campaign reach and frequency objectives, while reducing media wastage without sacrificing presence across premium publisher inventory.

The approach

Our solution was to first build a 360 view of all media, by introducing Campaign Manager as the single source of truth to measure cumulative campaign reach.

Then, to reduce media wastage by controlling frequency, both YouTube and direct premium publishers were consolidated through a single platform, Display & Video 360.

37%

Lower CPR than industry benchmarks

35M

Reduction in **Cost per unique user** reached

1.4X

Greater potential reach with same investment



“The trend toward automation has hit the marketing world and programmatic is one example. We are delighted to partner with SPVB on this remarkable path to have real tangible benefits to our media strategy. This was a result of applying advanced technology, whether it was to manage frequency across integrated channels or to extend reach more desired audience at scale by precise targeting, which resulted in a better return on media investment for our clients.”

Anh Vu
Senior Director, Business Lead (SPVB) - Mindshare

Three conversations marketing teams need to have to prepare for Modern Marketing

1

How to start the Digital Marketing Maturity conversation?

Key questions:

- Where are we now?
- Where do we want to be in the future?
- How do we get there?

Resources:

[Review our Digital Marketing Maturity section](#)

Do your [self assessment](#) to find where you are on the Digital Maturity scale

Read more: [The Dividends of Digital Marketing Maturity \(Feb 2019\)](#)

2

How to start the Media Strategy conversation?

Key questions:

- What are the implications of Digital becoming mainstream media to our media strategy?

Resources:

Review our [Consumer Trend](#) and [Key Technology](#) sections

Read more: [Rethink ready: How to prepare your business for what's next \(Sep 2020\)](#)

3

How to start the Privacy conversation?

Key questions:

- How do we shift to privacy first when it comes to digital marketing in order to effectively achieve our objectives in the future?

Resources:

[Review our Privacy section](#)

Read more: [Privacy & Trust on Think with Google](#)

GLOBAL CASE STUDY



Leading digitally mature companies are using new solutions to improve success metrics



Source - [How DBS reinvents brand campaigns through innovative storytelling and a full-funnel approach - Think with Google, April 2021](#)

DBS Bank wins consideration with a data-driven video campaign

As a leading financial services group in Asia and a purpose-driven organisation, DBS believes that it has a responsibility to address the pressing social and environmental issues that we are facing today. Its online mini-series, SPARKS, is inspired by real-life stories and used as an ideal platform to convey important messages and affect positive change. To raise awareness on sustainability-related issues, nurture conversations with customers and drive preference for the bank, DBS launched Season 2 of SPARKS, themed “Everyday Heroes for a Better World,” on YouTube.

The brand partnered with Google and Kasatria, a Google Marketing Platform partner, to evaluate the impact of its brand marketing initiatives on customer consideration and preference using Display & Video 360, Campaign Manager, and Analytics 360.

When DBS Bank assessed its campaign performance with a holistic view of its data, it measured a 159% uplift in brand interest. The bank also saw that view-through attribution from the SPARKS campaign led to 17% of new wealth inquiries, as well as 15% of new loans and SME product applications. What’s more, awareness of SPARKS has increased likelihood of using DBS Bank products and services by ~10% compared to those who were unaware.



↑159%

**Uplift in
brand interest**



+17%

**of new
wealth inquiries**



+15%

**of new lends and SME
product applications**

GLOBAL CASE STUDY



Leading digitally mature companies are using new solutions to improve success metrics



Source - [How DBS reinvents brand campaigns through innovative storytelling and a full-funnel approach - Think with Google, April 2021](#)

India's Max Life lifts qualified leads with Google Marketing Platform solutions

As one of the top life insurance companies in India, Max Life is always looking to drive high-value leads while making the most of its budget. To connect with people most likely to be interested in its policies, the brand integrated Google Marketing Platform's full suite of products with its own customer relationship management (CRM) system.

Max Life analyzed user behavior on its website by using more than 180 signals from Analytics 360 and developed machine learning models to predict propensity scores for each online lead. The top 30% of audiences scored by the brand's model were identified as "high propensity" leads in Analytics 360, while "similar to high propensity" audiences were leveraged to acquire more high-value users.

The brand then activated lead acquisition campaigns in Display & Video 360 based on how close people were to signing up for a policy. Outcome Based Buying (OBB) was also used to optimize for important customer actions, such as clicks. Max Life's machine learning-based omnichannel marketing strategy resulted in a **4.5X higher lead to sale ratio, and a 44% lower cost per sale.**



↑ 4.5x
Higher lead to
sale ratio



↓ 44%
Lower cost
per sale

GLOBAL CASE STUDY



Leading digitally mature companies are using new solutions to improve success metrics

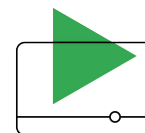
HJ Holdings

Source - [First-party data playbook for marketing: A guide to inspire APAC brands](#), Think with Google, Nov 2020

HJ Holdings keeps Japanese viewers engaged by consolidating its data

HJ Holdings streams videos in Japan using a subscription video on demand (SVOD) model that has over two million monthly subscribers. As the brand connected with more streamers through Google Ads, it noticed that the number of cancellations was also increasing. The cancellations inspired HJ Holdings to use its first-party data to identify potential churn to reduce it preemptively.

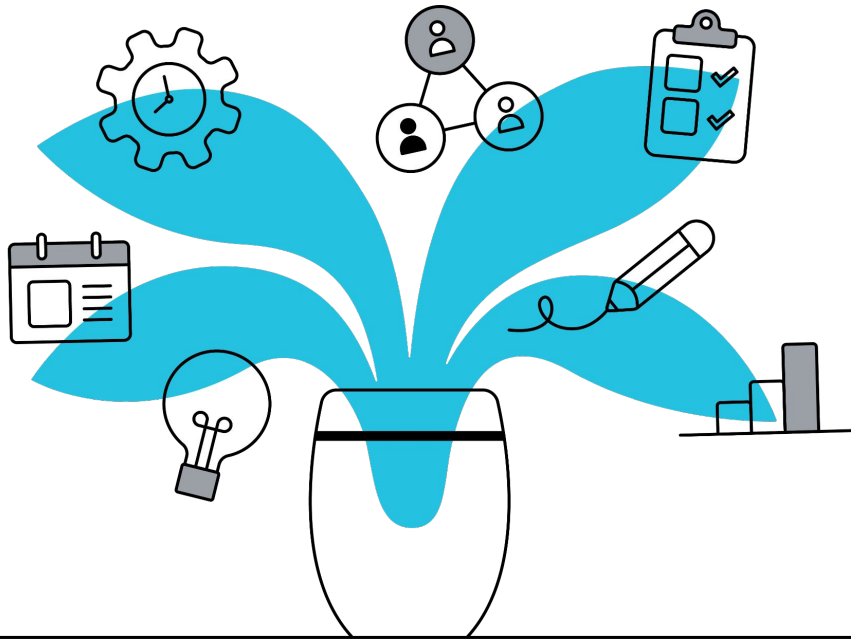
The brand integrated Analytics 360 and CRM data with BigQuery, a serverless data warehouse, and used Google's machine learning to extract a pool of users who were more likely to cancel their subscriptions. HJ Holdings then divided users who were more likely to cancel into test and control groups. The test group received display advertisements and push notifications from the HJ Holdings mobile app, while the control group did not. By re-engaging users who were more inclined to cancel, HJ Holdings reduced **churn by 7%**.



↓ 7%

Reduced churn rate

6



**Questions and
resources to help
you get started**

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- list of names in alphabetical order -

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