

Understanding and Measuring Digital Consumer Behaviour Across Devices in Vietnam

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Agenda

- State of Digital in Vietnam
- Measuring Digital
- Measuring Mobile in Stages
- MMX Multi-Platform

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What is the state of digital in Vietnam?

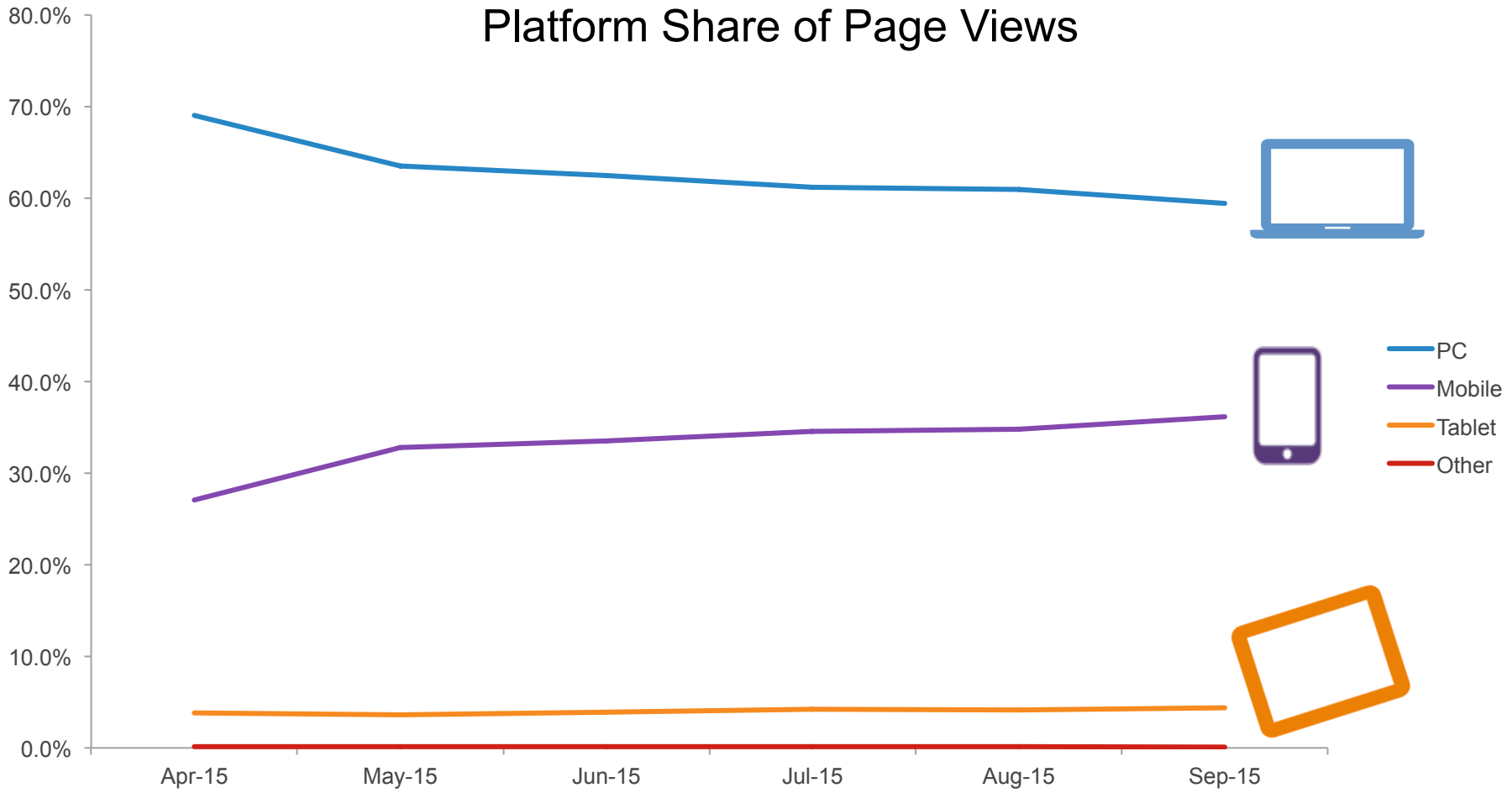
	New Enumeration
PC Home and Work 6+	23,838,314
PC Any Location 6+	27,780,722
Total Mobile (Smartphone/Tablet 18+)	24,951,731
Smartphone - Android	17,346,507
Smartphone - iOS	7,955,174
Tablet - Android	2,167,476
Tablet - iOS	2,115,377
Total Digital Population	37,397,256



Mobile Only: 9,616,534 **PC Only: 12,445,525**

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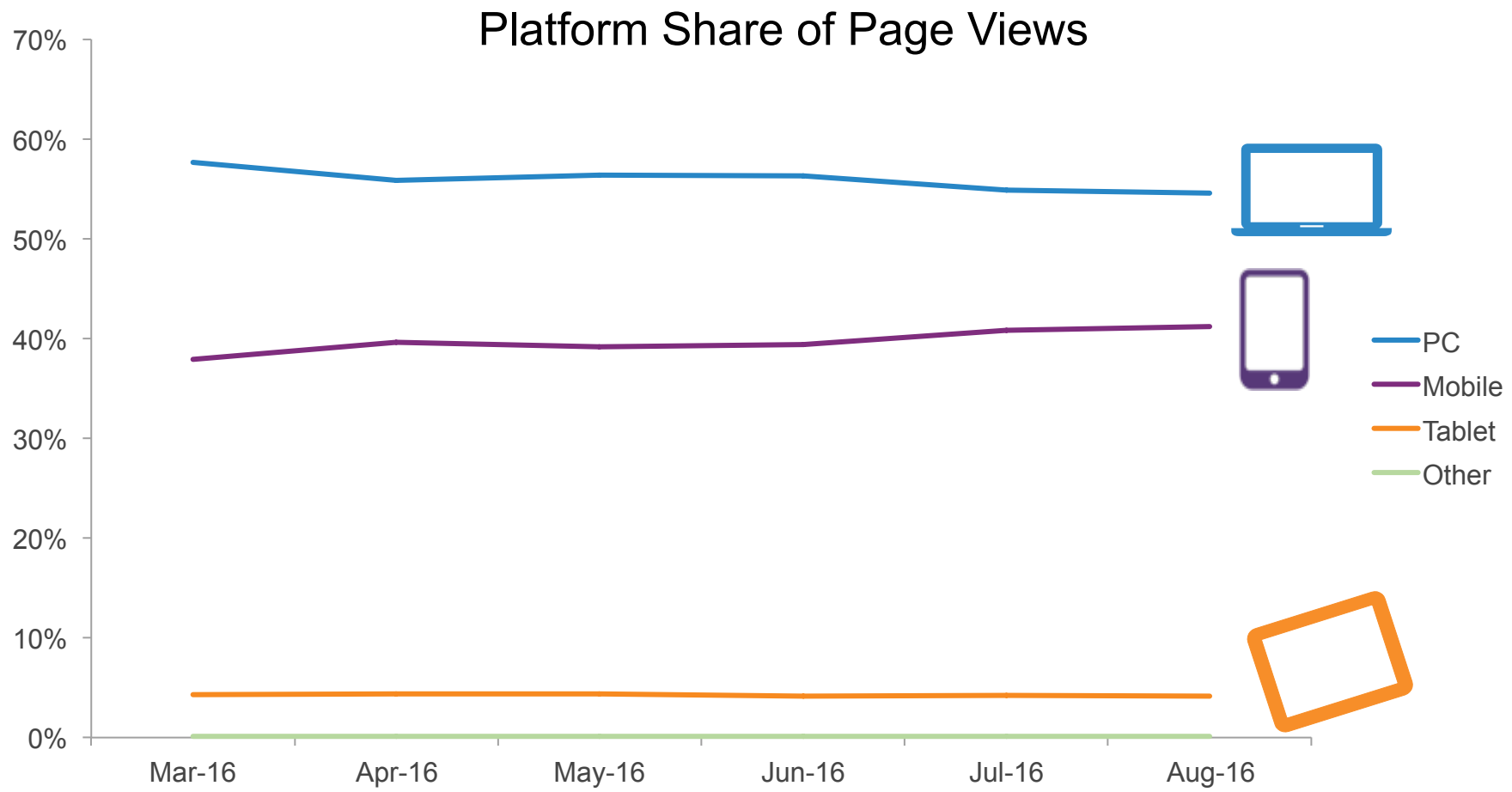
2015: Mobile web page view traffic is growing at the expense of PC traffic



Source: comScore Device Essentials, April – September 2015, Vietnam

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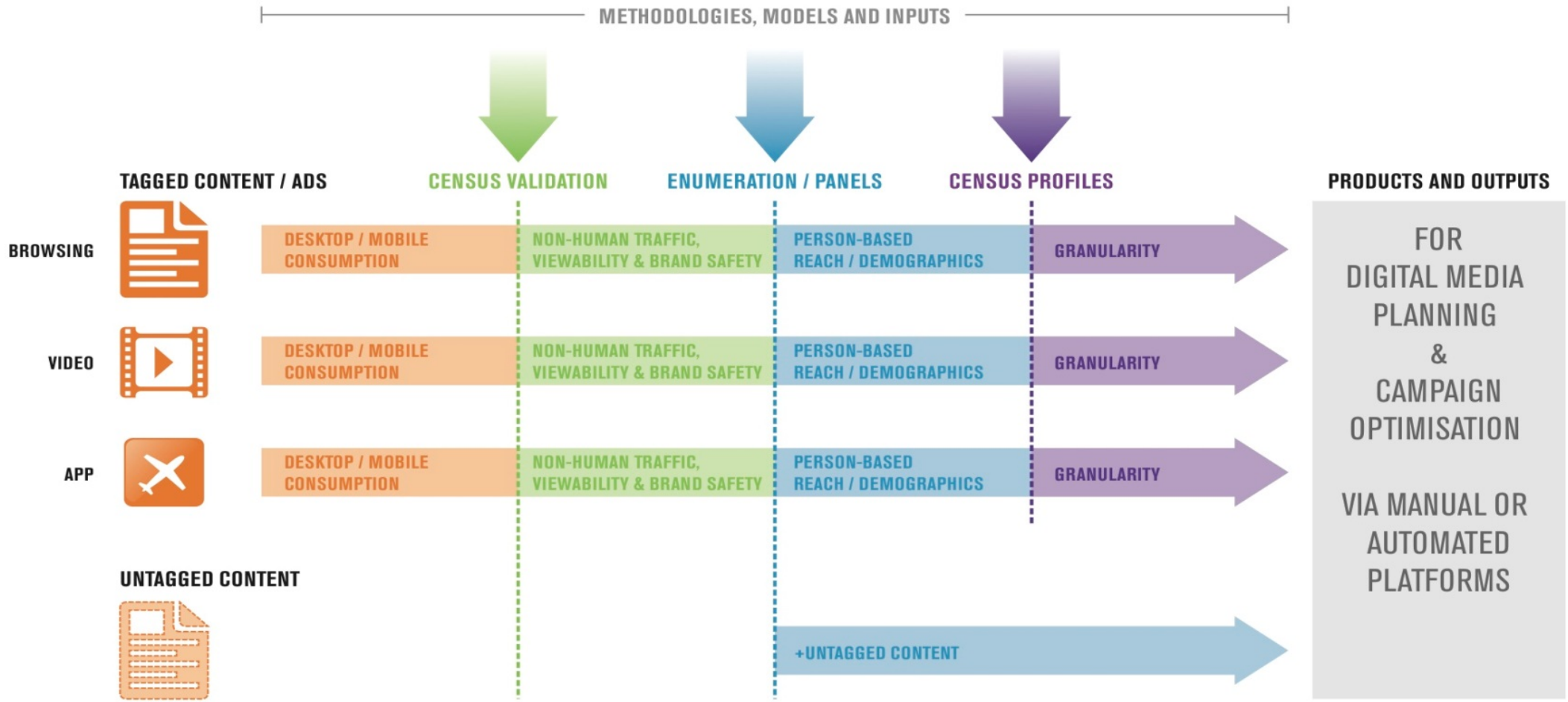
2016: PC and Mobile traffic stabilizing



Source: comScore Device Essentials, March – August 2016, Vietnam

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Measuring digital



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Measuring mobile – Phase 1

PHASE 1

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Mobile Metrix

- Mobile Metrix is census informed.
- Mobile Metrix measures tagged mobile pages and apps.
- Mobile Metrix reports on apps and browsers separately.

= Panel = Census Tags

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Vietnam: Mobile Metrix Top 10 properties

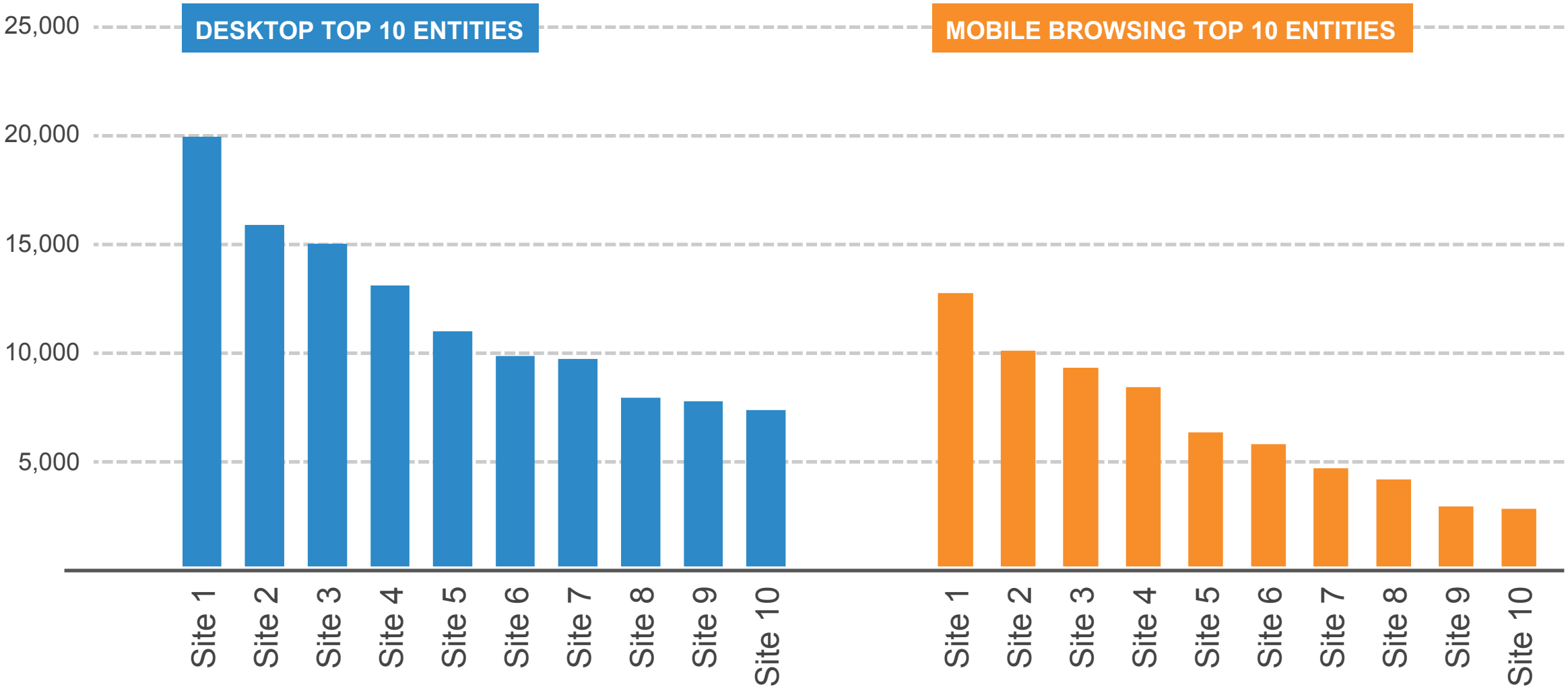
			Media	Total Mobile		iPhone		Android Phone		iPad		Android Tablet	
				Total Unique Visitors (000)	Total Minutes (000)	Total Unique Visitors (000)	Total Minutes (000)	Total Unique Visitors (000)	Total Minutes (000)	Total Unique Visitors (000)	Total Minutes (000)	Total Unique Visitors (000)	Total Minutes (000)
				(No filter applied)	(No filter applied)	(No filter applied)	(No filter applied)	(No filter applied)	(No filter applied)	(No filter applied)	(No filter applied)	(No filter applied)	
			Total Internet : Total Audience (Mobile Web & App)	25,914	4,476,873	7,955	1,369,567	17,347	2,547,442	2,115	292,515	2,167	267,348
			Top 100 Properties	N/A	...	N/A	...	N/A	...	N/A	...	N/A	...
1		P	Adtima-VNG Corporation	16,055	918,649	5,398	292,516	10,018	553,949	786	39,359	674	32,825
2		P	Admicro - VC Corp	13,606	732,641	4,161	230,120	8,803	412,650	698	61,759	625	28,113
3		P	FPT Online - EClick	11,305	659,739	3,666	223,402	7,037	352,857	625	56,831	535	26,649
4		P	24h Online Advertising JSC	11,056	795,215	3,212	225,678	7,241	499,956	591	36,579	554	33,003
5		P	WEBTRETHO.COM	7,564	174,751	3,025	59,663	4,247	103,124	285	6,690	229	5,273
6		P	YAN.VN	6,929	119,203	3,416	37,000	3,237	72,057	296	5,467	165	4,679
7		P	Thanh Nien	4,200	44,780	1,699	11,757	2,256	23,661	224	6,238	168	3,124
8		P	NHACCUATUI.COM	4,024	28,989	1,536	8,646	2,148	16,947	360	2,175	152	1,221
9		P	Yahoo Sites	3,098	29,651	1,163	10,827	1,743	14,171	155	3,525	135	1,129
10		P	TINMOI.VN	2,645	15,596	1,094	4,442	1,416	9,219	112	1,115	99	820

Source: comScore Mobile Metrix, August 2016, Vietnam

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Mobile is approaching desktop scale

(Figures in ’000 unique users)

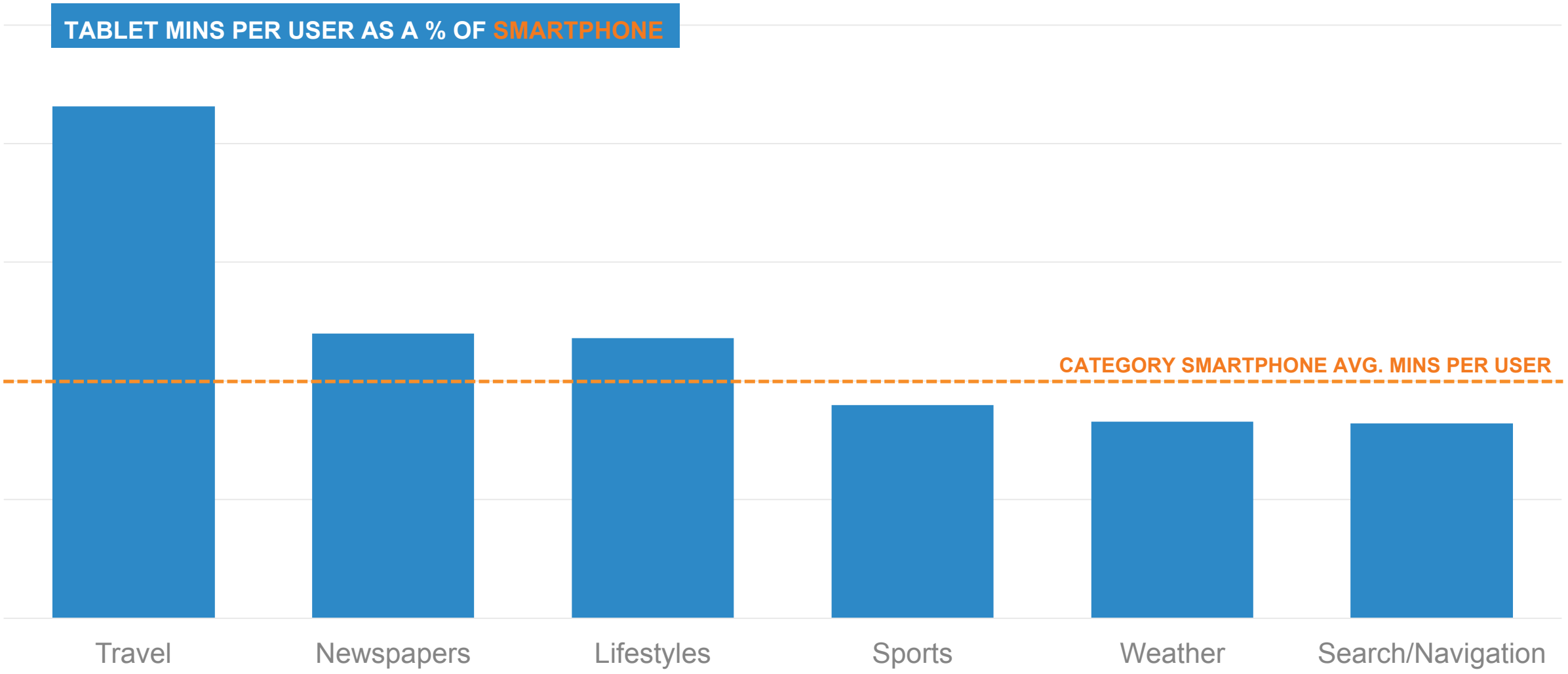


Source: comScore Mobile Metrix, Vietnam, August 2016

Note: Mobile Metrix in Indonesia uses comScore’s census-based methodology that reports on only tagged entities. Properties which only tag some of their assets (e.g. website but not app) or partially tag (e.g. homepage only) will only be measured on those tagged assets, which will have an impact on the total reported metrics of their entity.

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Choice of mobile device is heavily based on function

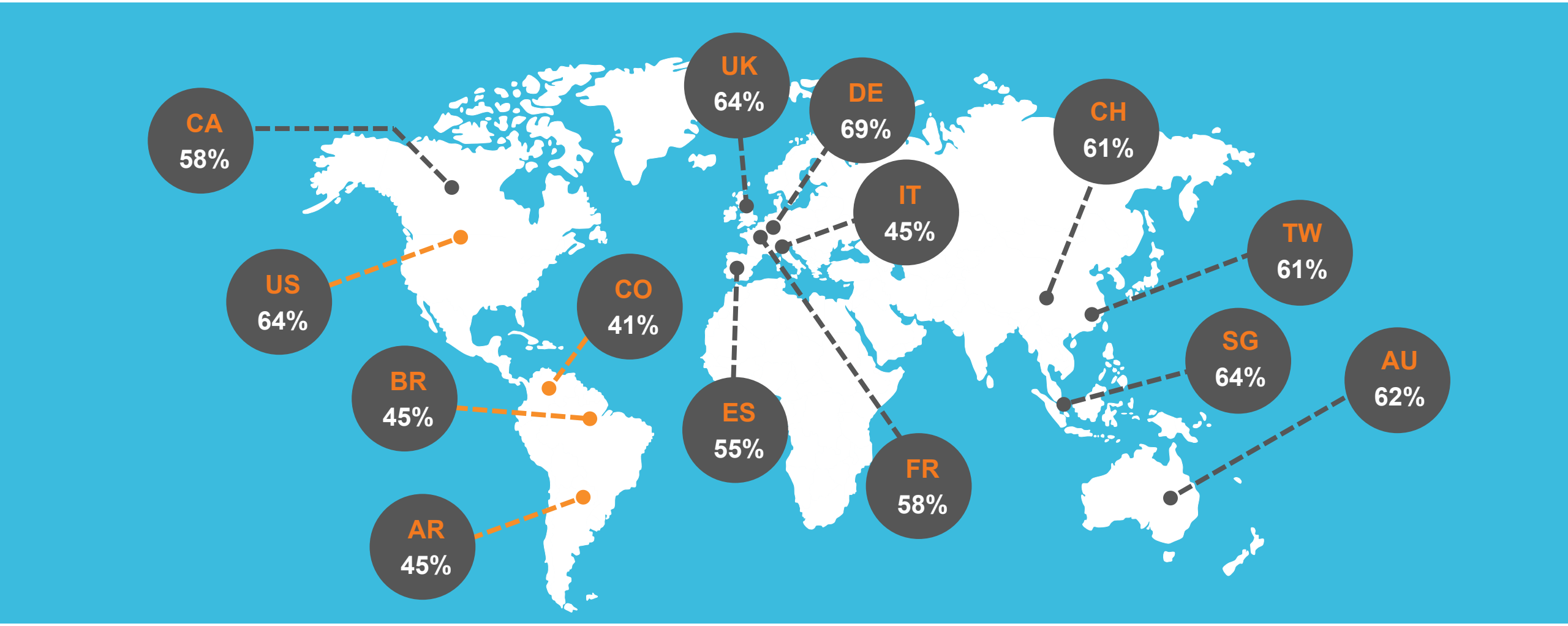


Source: comScore Mobile Metrix, Vietnam, August 2016
Note: Mobile Metrix in Indonesia uses comScore's census-based methodology that reports on only tagged entities. Properties which only tag some of their assets (e.g. website but not app) or partially tag (e.g. homepage only) will only be measured on those tagged assets, which will have an impact on the total reported metrics of their entity.

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Multi-Platform majorities are taking over

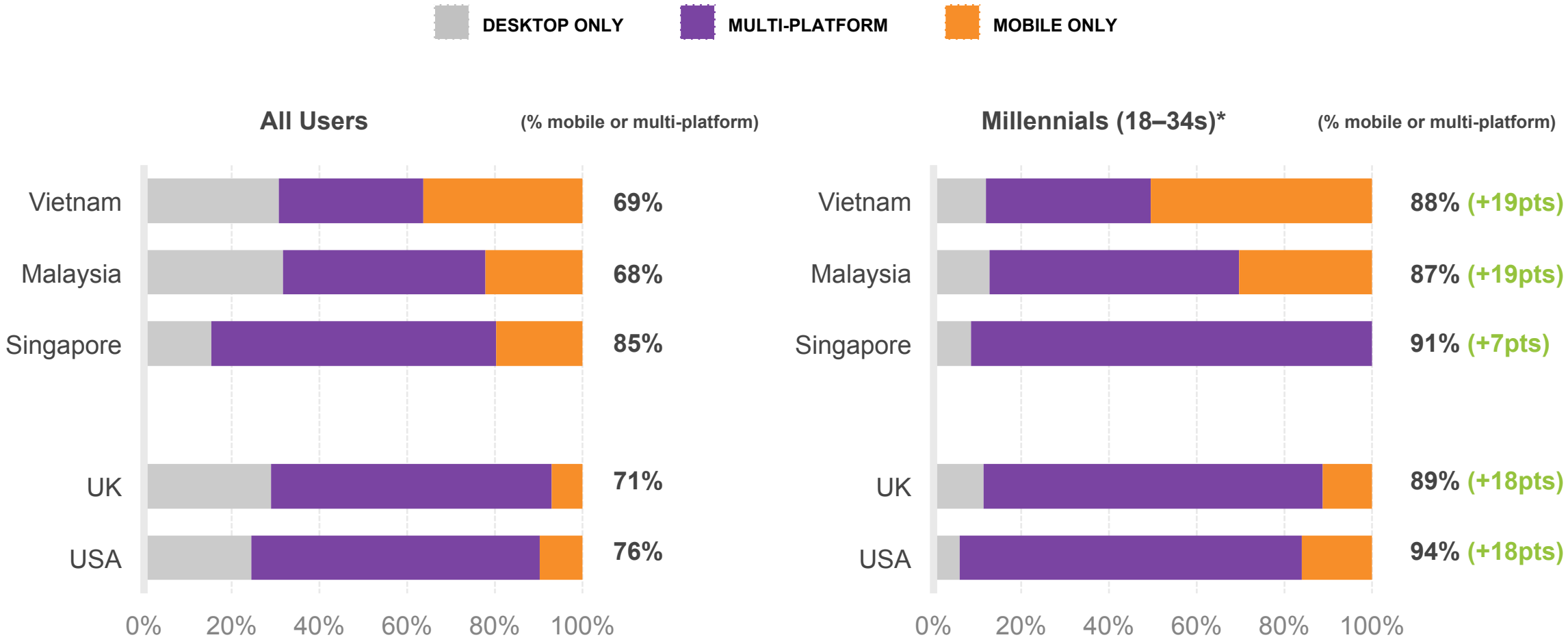
(% accessing digital content on more than one device)



Source: comScore MMX Multi-Platform, June 2016

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Younger demographics heavy drivers of mobile adoption



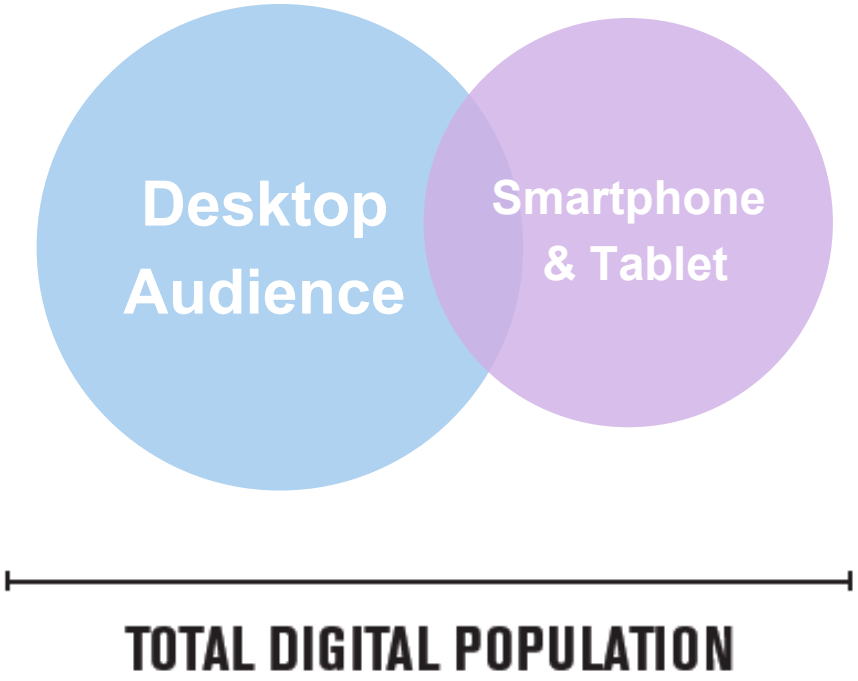
Source: comScore MMX Multi-Platform, August 2016 *Malaysia 15–34 for Millennial bracket
Note: Some markets use a census-based methodology for Smartphone and Tablet measurement, that reports on only tagged entities. Properties which only tag some of their assets (e.g. website but not app) or partially tag (e.g. homepage only) will only be measured on those tagged assets.

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Multi-Platform provides holistic digital media measurement across multiple devices

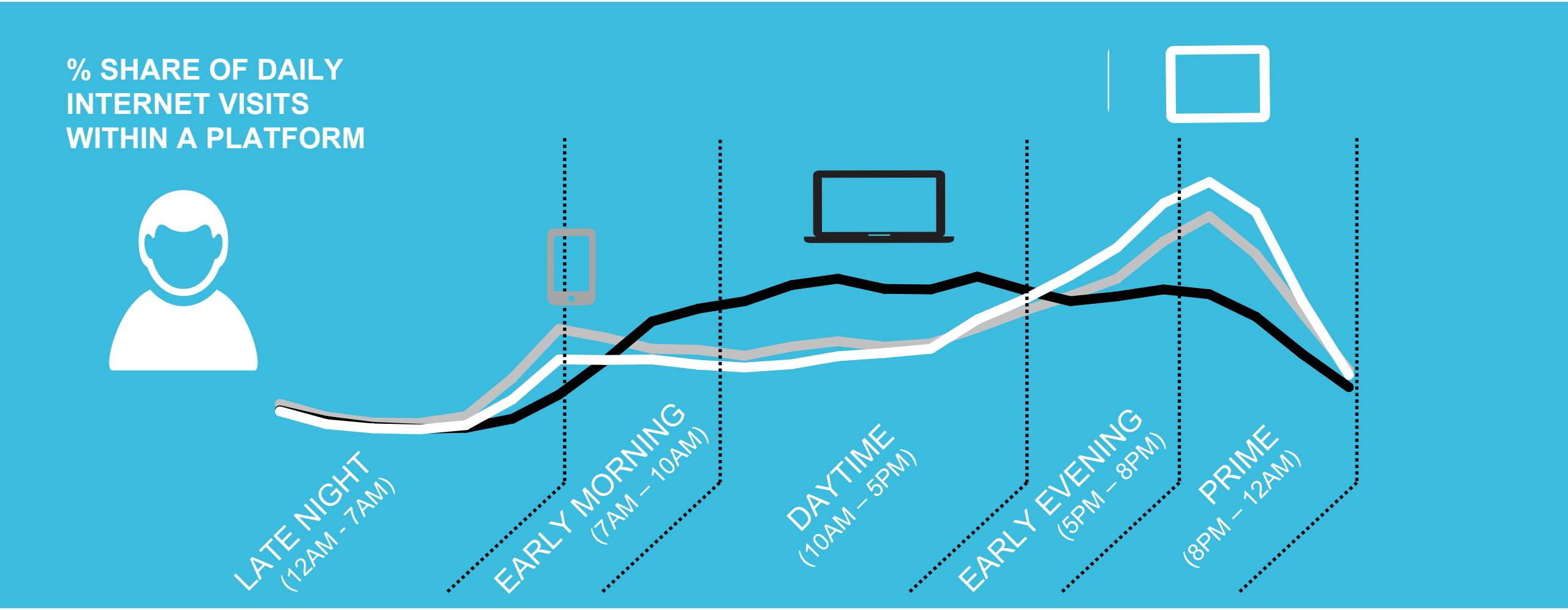
MMX Multi-Platform

provides an unduplicated view of total digital audience behaviour across desktops, smartphones and tablets.



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Example: Content is being consumed across multiple devices by the same person everyday

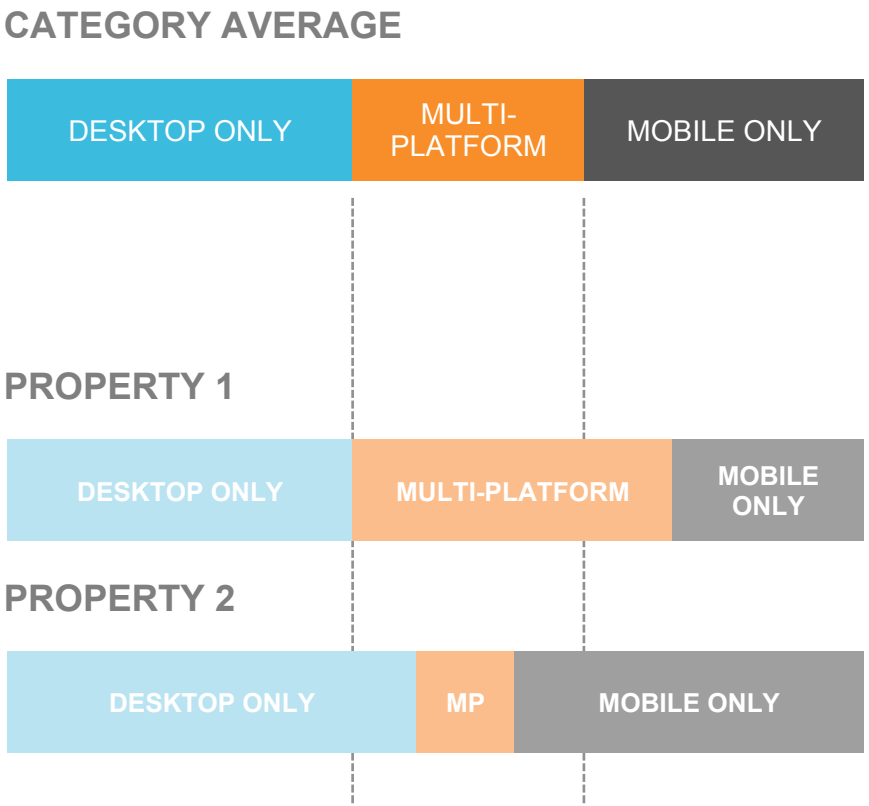


Source: comScore Device Essentials

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How does Multi-Platform consumption vary by property / category?

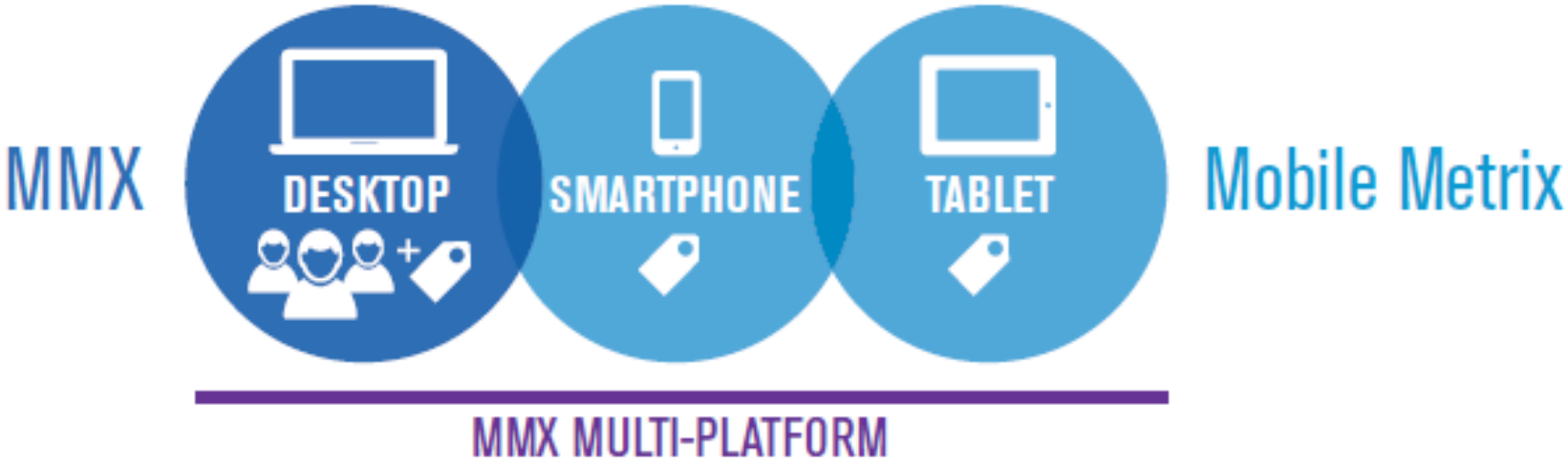
How does my properties' Multi-Platform consumption stack up?



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Measuring mobile – Phase 2

PHASE 2



- MMX Multi-Platform measures **unduplicated** audiences across desktop, smartphone and tablet.
- Mobile demographics in Mobile Metrix are modeled from Media Metrix.
- Mobile Metrix reports on apps and browsers separately and combined.

= Panel = Census Tags

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is now officially
LAUNCHED
in Vietnam!

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Vietnam: MMX Multi-Platform Top 10 properties

	Media	Total Unique Visitors/Viewers (000)			% Reach		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
		(No filter applied)	(No filter applied)	(No filter applied)	(No filter applied)	(No filter applied)	(No filter applied)
	Total Internet : Total Audience	37,397	23,838	25,914	100.0	100.0	100.0
	Top 100 Properties	N/A	N/A	N/A	N/A	N/A	N/A
P	Adtima-VNG Corporation	25,056	16,050	16,055	67.0	67.3	62.0
P	Google Sites	22,691	22,686	N/A	60.7	95.2	N/A
P	Admicro - VC Corp	22,096	14,164	13,606	59.1	59.4	52.5
P	24h Online Advertising JSC	17,570	10,443	11,056	47.0	43.8	42.7
P	FPT Online - EClick	16,406	8,973	11,305	43.9	37.6	43.6
P	Coc Coc	14,944	14,923	116	40.0	62.6	0.4
P	Facebook	13,721	13,721	N/A	36.7	57.6	N/A
P	BLUESEED.TV	12,366	12,366	N/A	33.1	51.9	N/A
P	YAN.VN	9,837	4,277	6,929	26.3	17.9	26.7
P	NHACCUATUI.COM	9,832	7,438	4,024	26.3	31.2	15.5

Source: comScore MMX Multi-Platform, August 2016, Vietnam

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Vietnam: MMX Multi-Platform Age & Gender

Target Audience	Total Internet		
	Total Unique Visitors/Viewers (000)		
	Total Digital Population	Desktop	Mobile
Total Audience			
Total Audience	37,397	23,838	25,914
Persons - Age			
Persons: 18-34	21,419	10,606	18,856
Persons: 35+	9,825	7,079	7,058
Males - Age			
Males: 18+	16,941	10,491	13,859
Females - Age			
Females: 18+	14,303	7,194	12,054

Source: comScore MMX Multi-Platform, August 2016, Vietnam

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Adtima – VNG on MMX Multi-Platform

Target Audience	Adtima-VNG Corporation		
	Total Unique Visitors/Viewers (000)		
	Total Digital Population	Desktop	Mobile
Total Audience			
Total Audience	25,056	16,050	16,055
Persons - Age			
Persons: 18-34	15,949	7,796	11,560
Persons: 35+	5,504	4,651	4,495
Males - Age			
Males: 18+	13,135	7,542	9,581
Females - Age			
Females: 18+	8,319	4,905	6,473

Vietnam >>

Unique Visitors/Viewers (000)

25,056	**16,050**	*15,794*	*4,558*	**16,055**	*15,416*	*1,460*
Total Digital Population	**Desktop**	*Desktop Web*	*Desktop Video*	**Total Mobile**	*All Smartphones*	*All Tablets*

USA >>

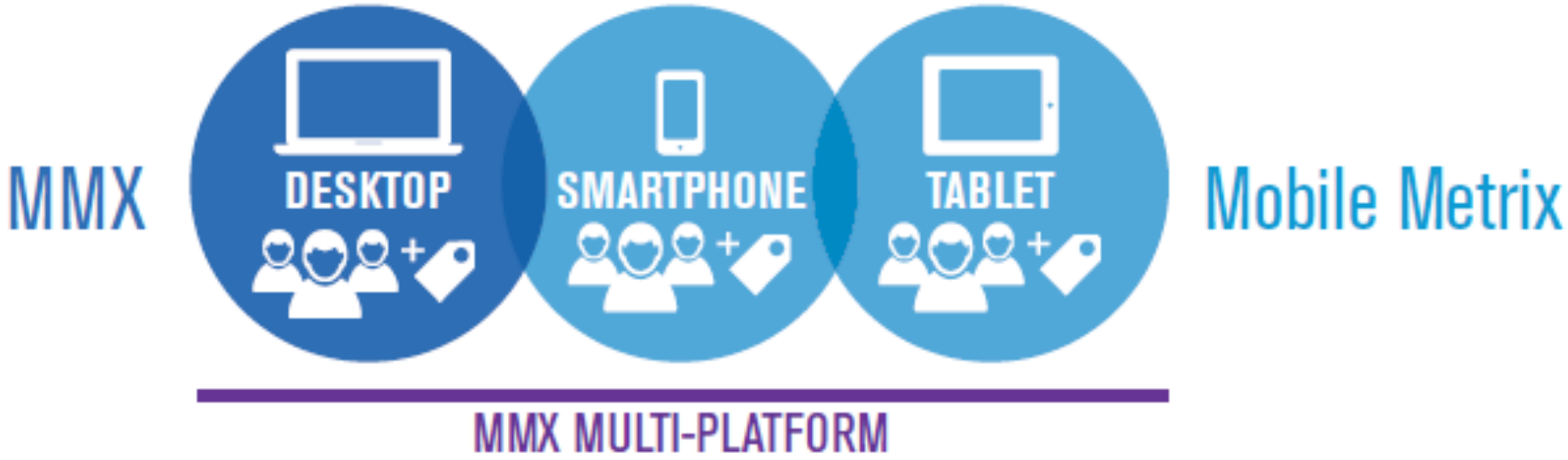
Unique Visitors/Viewers (000)

505	**256**	*215*	*79*	**263**	*229*	*35*
Total Digital Population	**Desktop**	*Desktop Web*	*Desktop Video*	**Total Mobile**	*All Smartphones*	*All Tablets*

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Measuring mobile – Phase 3

PHASE 3



- MMX Multi-Platform measures all desktop and mobile web pages and apps, including sites that are not tagged.
- Mobile demographics in Mobile Metrix are informed from the mobile panel.

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