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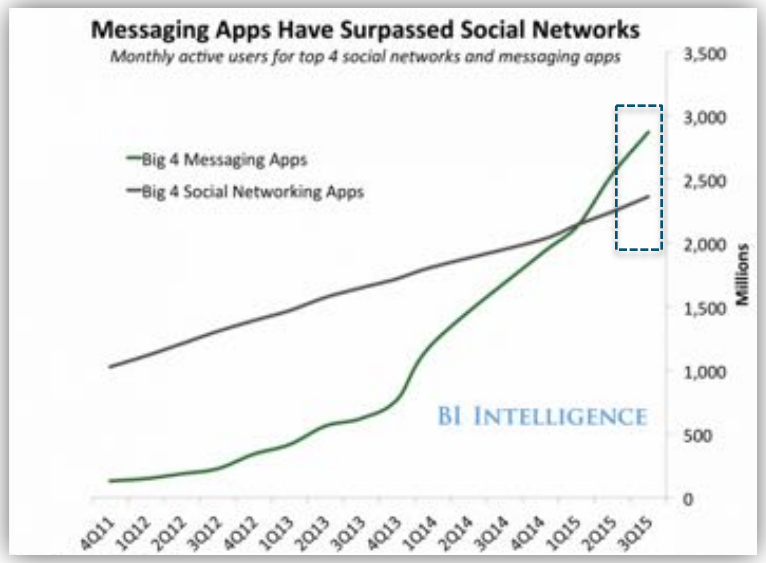
ZALO CHAT APP SHAPING THE CONVERSATION 3.0 IN VIETNAM




THE DAWN OF
CHATVERTISING

Messaging Apps - The Next Frontier In Mobile Marketing

People are more and more engaged with chat app than public social media networks for their to day-to-day communication



Top 4 Biggest Messaging apps surpassed social networks

Mobile phone messaging app user penetration (% of mobile phone internet users)

	2014	2015	2016	2017	2018	2019
Latin America	57.5%	68.1%	70.4%	73.0%	75.7%	77.4%
Asia-Pacific	57.7%	64.6%	67.2%	69.5%	71.2%	73.1%
North America	44.6%	58.7%	61.6%	65.9%	70.2%	74.5%
Western Europe	50.7%	58.0%	59.2%	59.9%	61.1%	62.3%
Central & Estern Europe	41.7%	53.5%	56.5%	59.0%	61.9%	64.4%
Middle East & Africa	30.7%	39.5%	40.8%	41.3%	42.2%	42.9%
Worldwide	51.7%	60.1%	62.4%	64.5%	66.4%	68.2%

Mobile phone messaging app user penetration (% of mobile phone users)

North America	30.8%	44.0%	49.3%	55.1%	60.1%	64.9%
Western Europe	30.3%	39.1%	43.4%	46.5%	49.3%	51.2%
Latin America	26.7%	36.1%	41.7%	46.3%	50.5%	53.6%
Asia-Pacific	27.1%	32.2%	35.2%	38.0%	40.7%	43.8%
Central & Estern Europe	21.4%	31.2%	36.3%	41.2%	45.3%	48.6%
Middle East & Africa	12.3%	17.0%	18.6%	19.8%	20.9%	21.9%
Worldwide	25.2%	31.7%	35.0%	38.0%	40.6%	43.3%

**Source: BI Intelligence & eMarketer, 2015*

Mobile Messaging Users in Vietnam Choose Homegrown Zalo

80% of Vietnamese users have installed Zalo on their smartphone (7% higher than Facebook Messenger)



Messaging Apps that Smartphone Users in Vietnam Have Installed on Their Smartphone, by Age, June 2016

% of respondents in each group

	18-25	26-30	30-35	35+	Total
Zalo	80%	83%	81%	71%	80%
Facebook Messenger	78%	72%	75%	69%	73%
Viber	33%	43%	51%	51%	40%
Skype	37%	40%	41%	23%	37%
Line	21%	18%	15%	11%	18%
Yahoo	9%	11%	16%	13%	11%
Tango	7%	10%	11%	13%	9%
WeChat	4%	7%	8%	2%	5%
WhatsApp	4%	4%	5%	3%	4%
KakaoTalk	3%	3%	4%	1%	3%
BeeTalk	3%	1%	3%	1%	2%
Snapchat	2%	1%	3%	2%	2%
Other	1%	3%	1%	1%	2%

Note: n=1,200
Source: DI Marketing, "Chat Apps Usage in Vietnam," June 10, 2016

*Source: DI Marketing & eMarketer, 2016

Mobile users spend more time on Zalo app than other mobile apps

Vietnamese users spend almost **10x** more on Zalo then daily average usage time of other app

Daily Time Spent Using Smartphone Apps vs. Web According to Smartphone App Users in Asia-Pacific, by Country, July 2016

minutes

	Smartphone apps	Smartphone web
China	45	55
India	44	62
Indonesia	69	66
Japan	22	38
Malaysia	59	54
Philippines	72	56
Singapore	45	46
South Korea	36	50
Thailand	68	50
Vietnam	51	47

Note: n=10,123 ages 18-64
Source: Google and TNS, "Mobile App Marketing Insights: Asia," Sep 22, 2016

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Average Number of Smartphone Apps Installed and Share Used Daily According to Smartphone App Users in Asia-Pacific, by Country, July 2016

	Apps installed	% used daily
China	38	21%
India	33	27%
Indonesia	33	20%
Japan	36	13%
Malaysia	34	21%
Philippines	39	21%
Singapore	44	19%
South Korea	53	21%
Thailand	32	24%
Vietnam	33	25%

Note: n=10,123 ages 18-64; read as smartphone app users in China have an average of 38 apps installed on their phone and use 21% of those apps daily
Source: Google and TNS, "Mobile App Marketing Insights: Asia," Sep 22, 2016

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Vietnamese smartphone users spend a daily average of 68 mins on ZALO

**Source: IPSOS & eMarketer, 2016*


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IN VIETNAM

Zalo - a Powerful Multipurpose Platform

Zalo provides more than just a messaging app, it is an all-in-one frictionless integration mobile-first platform



01 BRAND ACCOUNT

All brand's information and activities could be well integrated and connect customers within **one single entity**



Địa điểm ăn uống Zalo Official Account

Challenge: DDAU users love sharing reviews, discuss about favorite places and delicious foods. The app is not just reaching enough users across the nation.

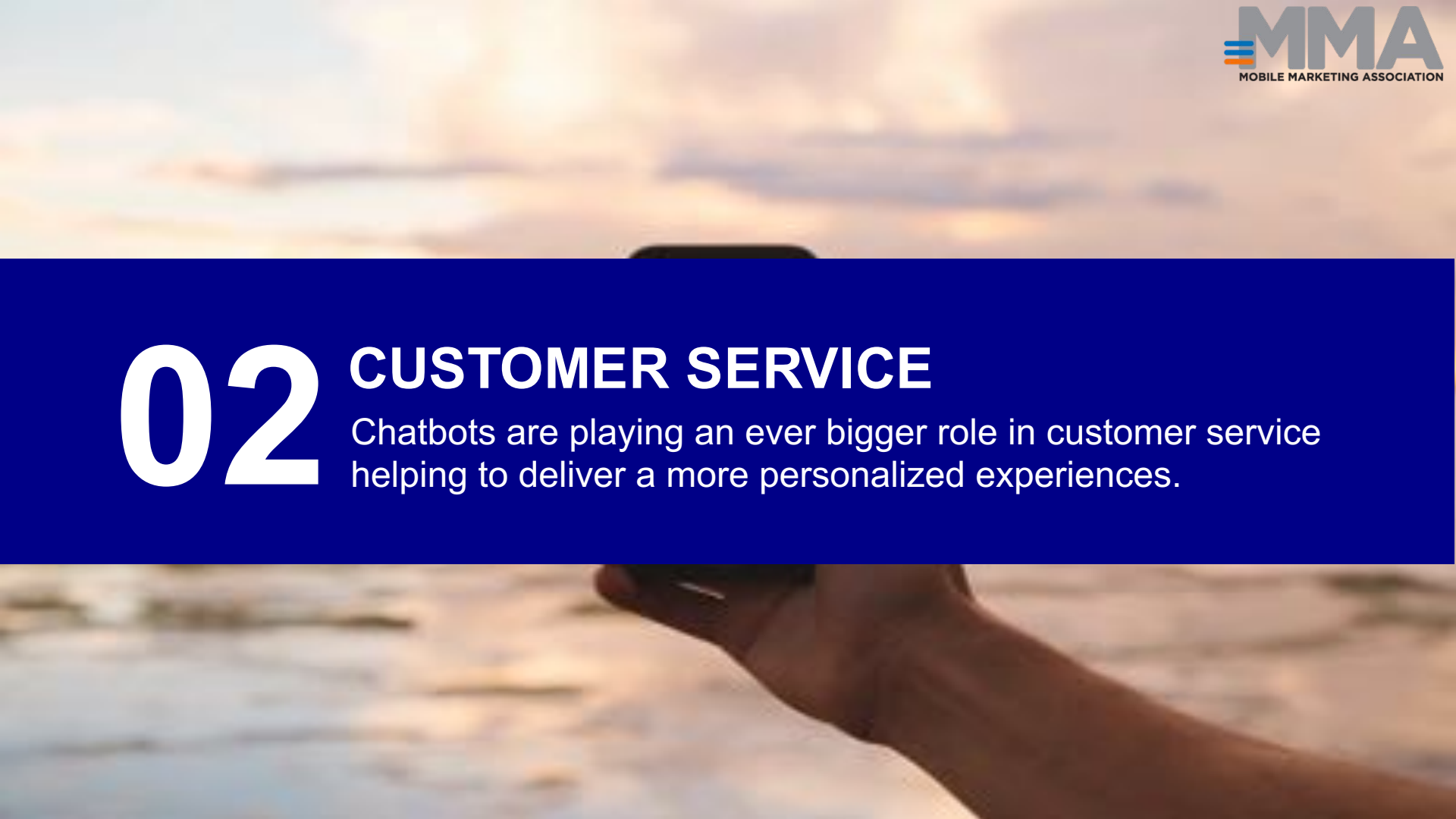
Summary:
An app-in-app model is a perfect solution for users to not only chat with their friends but also get a chance to keep updates about delicious restaurants and amazing travel experience all over the country. None of them need to leave Zalo. The experience is just so convenient and loveable.



7%
Engagement rate

30%
followers MoM

~ 300,000 followers



02 CUSTOMER SERVICE

Chatbots are playing an ever bigger role in customer service helping to deliver a more personalized experiences.

VACCINE SCHEDULES WEBAPP FOR MINISTRY OF HEALTH

Challenge: Moms are facing challenges in getting fundamental information about vaccination for kids. Ministry of Health even though has tried their best to update all timely information for moms but not many moms especially in rural areas honestly know where and when to get those useful updates.

Summary:
MOH has decided to launch a Zalo Vaccine Schedule Official Account to complete integrated all practical information including

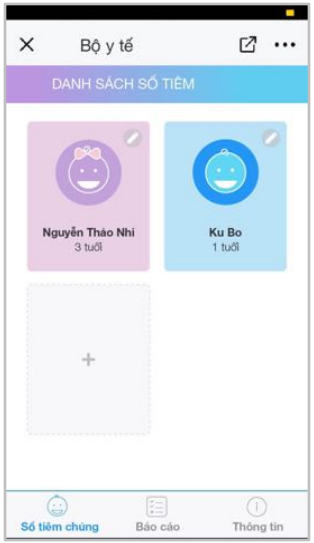
- Scheduled vaccine recommendations from birth through age 5
- Send personalized reminders when it's time for vaccination
- Look up the near-by locations at where vaccination is available



VACCINE SCHEDULES WEBAPP FOR MINISTRY OF HEALTH

MOH

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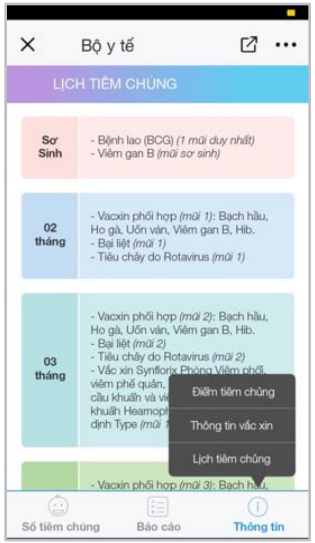
A personalized vaccine profile



A reminder when it's time for vaccination



A highlight vaccination report



Scheduled vaccine recommendations



Near-by vaccination locations



Useful vaccine information for moms

ZALO MOBILE GRADE BOOK

Challenge:

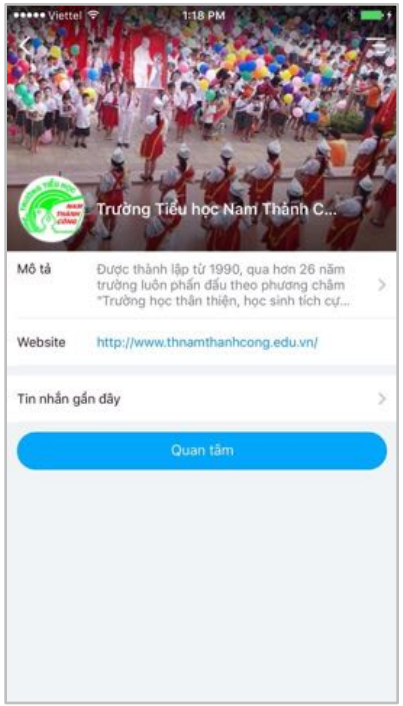
Teachers strive to establish partnerships with parents to support student learning. Strong communication is fundamental to this partnership and to building a sense of community between home and school. Parents normally got bored with traditional pushing-SMS communication method from schools.

Summary:

- OneEDU has used an Open API to connect with their network to provide **Zalo Mobile Grade Book** to 90 schools in Northern Region from now until Q1/2017.
- Nam Thanh Cong Elementary is pioneering apply this service
  - ✓ Send personalized monthly grade and teacher feedback to the parents
  - ✓ Send frequent principal notices/ scheduled exams
  - ✓ Query to search for any teacher's Zalo contacts
  - ✓ Chat/call with the school



ZALO MOBILE GRADE BOOK



An Official Account has been created



Parent can get school updates from sub-menu



Send frequent principal notices/ scheduled exams



Chat/call with the school or any teacher's Zalo contacts



03 ONLINE TO OFFLINE & ECOMMERCE TRANSACTIONS

Zalo has enabled an effortless shopping experiences through Zalo Shop function by linking social, CRM and ecommerce into one tight ecosystem



ZALO SHOP

ZALO SMART ASSISTANT

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04 PUBLIC SERVICES

Zalo is basically an ALL-IN-ONE app. It has the ability to connect all public services from utility payment to booking doctor appointments



XUYÊN Á GENERAL HOSPITAL

Challenge:

Long waiting times for hospital appointments as well as delays in diagnosis and treatment are among the most common sources of frustration. Patient experience generates a strong linkage to hospital image and hospital fees. Hospital operation efficiency and services also become differentiators among hospitals.

Summary:

Xuyen A General Hospital establish an Innovation Health Care Solution via Zalo OA. They design an admirable **Appointment Scheduling & Medical Diagnosis Book** to significantly improve their logistics and operations management including:

- ✓ Scheduling appointment with outpatient doctors or request for after-hour medical care at home
- ✓ Query for Medical Diagnosis history
- ✓ Checking diagnosis results





VIETNAM ELECTRICITY – HO CHI MINH CITY BRANCH

Challenge:

Electricity, gas, water and phone bills can be difficult to pay when you are unfortunately not available at home when Utility Officer come visit your house and unexpectedly forget the payment.

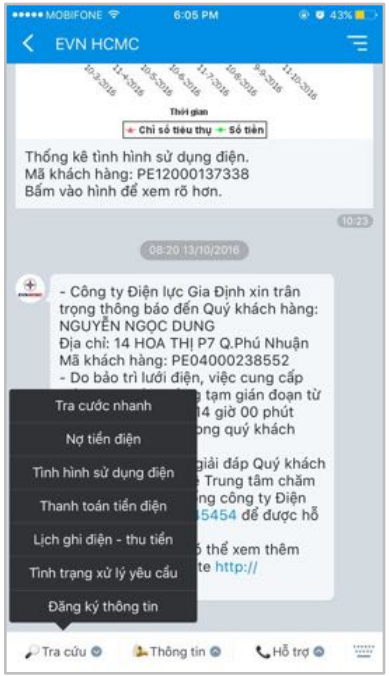
Summary:

Vietnam Electricity (EVN), a State-owned economic corporation which plays a key role in ensuring electricity supply for national economy, has made an end-to-end easy solution for electricity bill payment on Zalo. People find it exceedingly informative and helpful.

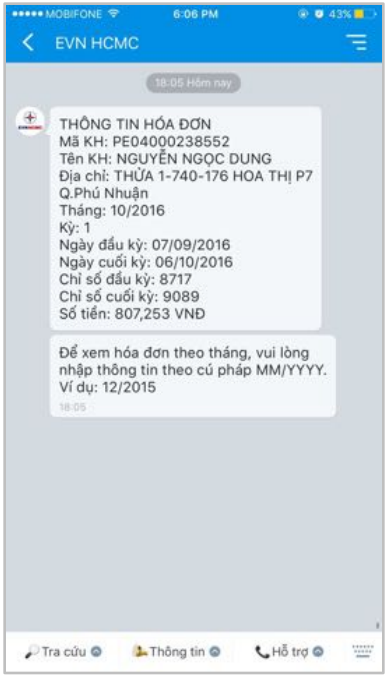
- Checking overdue electricity bill payment
- Query for electricity usage record and billing schedule
- Query for request solving status
- Electricity bill payment
- Supportive tips and safety information about energy saving
- Notifications for electricity maintenance schedule



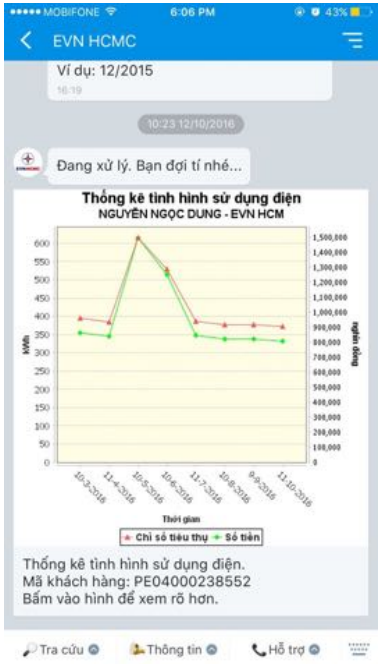
VIETNAM ELECTRICITY – HO CHI MINH CITY BRANCH



Query function related to electricity services



Auto-response message with pre-design syntax



Monitor electricity usage history for better saving energy plan



Notifications for electricity maintenance schedule


Zalo
ALL-IN
3.0 CONVERSATION PLATFORM