

The State of Mobile in Rural Vietnam Report

2018/2019





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Foreword

Vietnam is a mobile-first market, with nearly all internet users owning a smartphone and $\frac{3}{4}$ using it as their preferred connection device. Mobile is also the primary digital platform in rural Vietnam.

Despite the strength of mobile in Vietnam, there is currently a lack of publicly available research on rural audiences and consumers, especially when it comes to their digital behaviors on mobile.

Where past research has been available, it quickly dates and does not adequately reflect the current state of mobile in a rapidly changing landscape. Additionally, past research on mobile behavior has covered Vietnam as a country in its entirety, without drilling down into rural audiences.

“Mobile is the primary digital platform in rural Vietnam.”

As a result, marketers in Vietnam have been forced to resort to a ‘one-size-fits-all’ approach, which targets both urban and rural users as the same audience.

At the Mobile Marketing Association (MMA), we aim to help marketers lead an imperative for marketing change in ways that enable future breakthroughs while optimizing current activities. That’s why we believe that this report “*The State of Mobile in Rural Vietnam 2018/2019*” will help create a meaningful impact for marketers in Vietnam, who are looking to implement growth strategies by targeting and engaging with rural Vietnamese consumers.

Report Purpose and Objective

This report aims to provide marketers with valuable insights on the state of mobile of rural audiences in Vietnam, specifically in terms of digital behaviors, payment methods, and responsiveness towards online advertising, especially on mobile. The report will draw out implications for marketers to utilize for their upcoming marketing campaigns in 2019.

By enlightening, empowering, and enabling marketers, the MMA shapes future success, while propelling business growth today.

Report Contributors

“*The State of Mobile in Rural Vietnam 2018/2019*” report by the MMA is a project led by Google with participation from MMA’s network of partners, including Adtima, Dentsu Aegis Network, Infocus, Kantar Worldpanel and Nielsen.



Executive Summary: Key Trends & Insights



For the purposes of this report, the rural demographic in Vietnam is defined as the population that resides outside the six major cities of Ha Noi, Hai Phong, Da Nang, Nha Trang, Ho Chi Minh, and Can Tho.

At present, up to 70% of the population in each province of Vietnam live in rural areas. Vietnam is a mobile-first market, with nearly all internet users owning a smartphone and $\frac{3}{4}$ using it as their preferred connection device. The market has over 51 million smartphones, representing over 80% of the population aged 15-years and older.

In rural Vietnam, 68% of mobile phone owners have a smartphone.

The rural Vietnamese demographic spends on average three hours connected to the internet each day. While PC ownership is the more likely primary connection device in urban areas, rural

internet users prefer their smartphone. Wi-Fi at their home is the preferred connection method. Mobile data is purchased infrequently in equal splits between pre and post-paid data where Wi-Fi is not available.

The rural Vietnamese have a strong sense of both national pride and family integrity, with togetherness being an important aspect of everyday life. With family as a core value, the mother fulfils an important role in driving the family forward, by guiding the future of her children.

A key personal challenge for today's rural Vietnamese is the notion of leaving the rural environment and the lifestyle limitations associated with it. Due to these limitations, the internet (through their mobile) has become even more important in providing the resources that rural Vietnamese require to meet their needs and wants.

Rural users spend 40% of their time on the internet interacting with each other via chat apps. On average, rural Vietnamese access instant messaging apps 6 to 7 times per day, with an average session lasting 20 minutes.

Mothers are one of the key demographics in Vietnam, with their media habits and life priorities being guided by a strong desire to see their children succeed. YouTube is seen as a tool for mothers to groom their children for success and help them to achieve the aspirations they consider themselves as not having fulfilled.

Millennials in rural Vietnam use the internet to build their own competencies, and in turn, increase the collective family status. They are generally more driven than mothers, using media to build and master skills for their own progression. However, like mothers, millennials would use the internet more frequently if data was cheaper and connections were faster. The relevance of online advertising plays a critical role in conversion and marketers need to leverage this to reach rural Vietnamese audiences effectively. By leveraging the aspirations of rural Vietnamese, marketers can



tailor their message to showcase how their products and services can help the audience achieve their goals and aspirations.

Marketers should create advertising that showcases a transformation of image, stature, identity, body, skills, and knowledge. They should also illustrate progress, such as providing examples of rural Vietnamese achieving life goals including owning a vehicle, getting a good job, or achieving public recognition.

KEY RURAL HIGHLIGHTS

140
min per day

Rural users use instant messaging apps 6-7 times per day for an average of 20 minutes per session

82%

Amount of rural users using the YouTube app on mobile for relaxation

40%

Time spent interacting with each other via chat apps

70%

Amount of rural users who click on relevant Search ads

45%

Amount of rural users making in-store purchases as a result of searching online

90%

Amount of Zalo users who use Zalo on a daily basis



TAM PHAN BICH, COUNTRY
MANAGER, VIETNAM, MYANMAR
& CAMBODIA, MOBILE MARKETING
ASSOCIATION

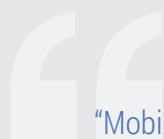


In rural Vietnam, consumers primarily use smartphones. With the number of people in this important demographic growing, there are multiple opportunities for marketers to target these users.

Vietnam is one of the strongest growth markets for mobile ad spending in the region. This is only expected to increase as smartphone penetration and the consumption of online content rises."



NITIN GAJRIA, COUNTRY
MANAGER VIETNAM,
GOOGLE



"Mobile Search is the top information seeking channel for rural Vietnamese and is highly utilised by the majority of consumers. With Vietnamese using mobile search and social media as their core information sources across all categories, mobile marketers need to tailor their advertising to the aspirations of this important rural demographic.

With over half the population actively using mobile search and leveraging other internet sources like video and music for education and entertainment, this report gives marketers the insights they need to craft solutions that target this important demographic effectively."



Introduction to Rural Vietnam

Definition of which city/demographic is classified as rural

Defining the rural demographic in Vietnam is complex due to different companies using various classification schemes. For the purposes of this report, the rural Vietnam demographic is defined as areas that exclude the six major cities of Ha Noi, Hai Phong, Da Nang, Nha Trang, Ho Chi Minh, and Can Tho.

Currently up to 70% of the population in each province of Vietnam live in rural areas.

An overview of Infrastructure, internet access and mobile penetration

Of internet users in Vietnam, 94% own a smartphone. A smartphone is defined as a mobile phone which performs many of the functions of a computer, typically has a touchscreen, internet access and an operating system capable of running downloaded apps. Smartphone penetration has doubled since 2014, with 72% of the market accessing the internet via this device and Wi-Fi being the primary internet connection method.

Demographic, Internet Penetration & Devices

Device ownership and primary device for connection

Smartphone penetration in Vietnam has doubled since 2014 and there are now 51 million smartphones, representing over 80% of the 15 plus aged population. In rural Vietnam, 89% of the population have mobile phones, with 68% of these owning a smartphone.

Level of engagement online throughout the day

Rural users spend 40% of their daily internet time interacting with each other via chat apps. With rural Vietnamese accessing instant messaging apps six to seven times per day with an average session lasting 20 minutes.

Locations of accessing connection

Although Wi-Fi in their own home is the preferred connection method, mobile data is purchased by rural Vietnamese consumers in

equal splits between pre- and post-paid data where Wi-Fi is not available. The lack of 3G and 4G connections may limit rural smartphone users to connect mainly at home, hindering mobile data consumption. However, Urbanites have more access to these networks and therefore buy mobile data more regularly.

Internet habits by location

Vietnamese online consumers use mobile search and social media as their core information sources. Mobile search is used frequently to satisfy informational needs and users are open to interacting with search advertisements. Entertainment is the most searched category in 95% of urban and 86% of rural consumers.

When compared to their rural counterparts, urban consumers are more readily activated by Search ads when making purchases. They are an online-savvy segment with an inquisitive mind and a strong enthusiasm for spending. Relevant content is a key driver for clicking on ads.



KHOA DOAN, DIRECTOR,
CONSUMER INSIGHTS,
NIELSEN

"Today Vietnamese use their smartphones as their primary internet access device. Leveraging their mobile devices, they actively communicate with each other while using online content to entertain and educate themselves. As a mobile first market where messaging, social media, online video, and e-payments are growing at a rapid pace, the mobile economy of rural Vietnam is growing providing greater opportunities for mobile marketers."

Internet habits and device ownership by audience (mothers and millennials)

Mothers

Mothers are one of the key demographics in Vietnam, with there being several significant differences when it comes to internet usage among mothers and women without children. Mothers tend to own more devices, such as TVs and tablets, and those who buy mobile data are less likely to control their online usage. However, it is non-mothers who are more likely to buy mobile data and appear more comfortable with smartphone usage.

The media habits and life priorities of Vietnamese mothers are guided by a strong desire to see their children succeed. Accessing online video content is a part of many mothers' daily lives, with nearly half watching online video content with others. Mothers say they would use services, such as YouTube, more frequently if internet data was cheaper and faster, and if it had more educational content.

YouTube is used as a tool for mothers to groom their children for success, helping their children achieve the aspirations they themselves were unable to fulfil. Both rural and urban mothers want content that can teach them something new, as well as provide a seamless user experience in familiar formats.

Millennials

Millennials are looking to progress by building their own competencies, and in turn, increasing the collective status of their family. Millennials are more likely to access the internet several times day and from numerous locations (including work and internet cafes). This substantial connection also leads to long internet session times.

Millennials are more likely to use a smartphone as their primary connection device, which translates into a higher likelihood of buying mobile data. However, those over 35 years of age are more likely to use a more traditional PC connection. This smartphone usage shows millennials appear more comfortable on mobile devices when it comes to behaviours such as app installation.

They are generally more driven than mothers to use media to build and master skills for their own progression. However, like mothers, millennials would use YouTube even more if internet data was cheaper and faster, and if there was more educational content. YouTube ads must feel relevant to millennials' needs and relatable to their lives.

YouTube can also be used as a tool by millennials for self-achievement and progression, which contributes to the collective status building of their family.



Google Search & YouTube

Main drivers for using the two platforms

In Vietnam, the number of users who search daily and leverage search is 1.4x higher in urban than rural areas. Search is primarily used to obtain quick and relevant information, and users are generally receptive to ads that are applicable to their lives. Ultimately, search is used to drive awareness, consideration, and purchase.

98% of Vietnamese who watch YouTube on mobile devices regularly use the YouTube app, with no difference in access between urban and rural users. However, there are differences in the way that YouTube is used across these demographics. Urbanites appear to engage with the site at a deeper level, whether it is through watching more content for education, or as part of the purchase process. They are also more likely to multi-screen, whereas rural users predominantly use smartphones at home.

Top highlights on media consumption behaviours (content, perception, and frequency)

Mobile Search is the top information seeking channel, with urban users being a key customer segment as they are more receptive to ads and are inclined to purchase more than their rural counterparts. Urban consumers tend to be younger, more curious, and more willing to use multiple information channels than their rural peers.



82% of rural Vietnamese use YouTube for relaxation, as opposed to 65% of their urban counterparts. However, only 11% of them use it for learning compared to 42% of Urbanites. Listening to music is another popular category, with 67% of Urbanites and 59% of rural Vietnamese using YouTube for this purpose. Urban users also watch more video genres than their rural counterparts in every category.

Role of platform in influencing path of purchase

People that search on mobile tend to follow up with a purchase, with 70% of rural Vietnamese clicking on relevant search ads and 45% making in-store purchases as a result of searching online.

Rural Audience - Ethnography Findings

The psyche of rural audience: what motivates them, what are their daily challenges and aspirations?

A key aspiration among many rural Vietnamese is to create a life for themselves in the major cities or abroad. In a laborious, enterprise driven economy, time is money. Media fights for attention in the daily lives of rural Vietnamese. They also have a strong sense of national pride and family integrity, and togetherness is very important to them.

How does the psyche dictate the way they consume media?

What is the role of online media?

Sharing of content is low compared to other SEA rural markets, due to a combination of low confidence and trust. Trust is built through popular acceptance, authority, reviews, and credibility. Television dominates this space currently. In terms of online content, video rules as it carries values of transparency and trust.



How the rural audience use YouTube and Search

43% of users who search online daily also access YouTube daily, with entertainment being the top search category. Mobile search is also an important information source for most categories, including those with high mass appeal and high daily involvement.



SANDIP ROY, CHIEF
OPERATING OFFICER,
DENTSUX VIETNAM

“Rural Vietnamese continue to leverage the internet to communicate, stay informed, and purchase goods online. As one of the fastest growing consumer markets, with internet access and smartphone penetration increasing at a rapid rate, marketers can leverage the insights from this report to drive conversion in this market. With mobile being the primary avenue rural Vietnamese utilise to access the internet, understanding what motivates this demographic is vital to mobile marketing success”

Research Data References

Adtima Understanding Rural User Study, Google SEA Search User Insights, Google SEA Search User Insights – Vietnam, YouTube Audience Insights (Quant), YouTube Profiling – Vietnam, Mobile Vietnam – A Rural Perspective (Infocus presentation), Kantar Worldpanel Vietnam

Rural Audiences on Digital Platforms

How does the rural audience use and interact with different digital platforms?

Mobile is the primary digital platform in rural Vietnam. Television dominates trust which is built through popular acceptance, authority, reviews, and credibility. However, Zalo, Facebook, and YouTube are important platforms across every demographic. YouTube's importance as an alternative and complementary platform to television is highlighted by the fact that over 65% of Vietnamese visit YouTube first after they have missed something on TV and 75% of Vietnamese mothers watch content on YouTube because it is exclusive and not available on other channels.

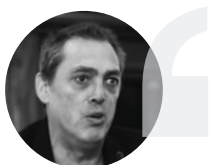
Three quarters of rural users listen to music on Zing MP3 while doing other tasks on the internet, with more than 90% of Zalo users using it on a daily basis. Usage increases during special seasons such as Tet and Christmas, as users reach out to connect with family

and friends. Among Zalo official accounts, entertainment and daily news yields the highest interest which aligns with Search and YouTube behaviour.

Deep dive into mobile usage

Vietnam is now a mobile-first market, with nearly all internet users owning a smartphone and $\frac{3}{4}$ using it as their preferred connection device.

Rural users spend 40% of their average internet time interacting with each other via chat apps. On average, rural Vietnamese access instant messaging apps six to seven times per day with an average session lasting 20 minutes. Users predominantly use their mobile devices for communication and entertainment, with communication being the primary need in the rural north of the country, while social usage and content sharing behaviour are the primary needs in the rural south.



RALF MATTHAES,
MANAGING DIRECTOR,
INFOCUS

"Rural mobile users are strongly represented in services, education, retail and agriculture categories. With smartphone internet browsing, social media, and instant messaging forming the core online activities of this growing market segment, mobile marketers can leverage the insights of this report to create effective, targeted advertising."

Instant Messaging, News & Media

Smartphone internet browsing dominates in rural Vietnam, demonstrated by analysing search behaviour where these categories are the most popular. Instant messaging apps dominate online activity, with 38% of users utilizing online chat daily.

Zalo, Facebook, telephony, and Gmail will continue to drive overall communications means for the foreseeable future. FaceTime, Viber, and Instagram are beginning to take root. However, new entrants could make a major impact as well.

Payment via Phone Apps

Due to the lack of development of modern retail in rural areas, a large discrepancy exists in terms of where rural and urban mobile users shop. The retail market for this rural demographic is dominated by traditional trade and wet markets. Taking these factors into account, there is an opportunity for e-commerce and significant room for online marketplace growth, especially in rural areas.



Research Data References

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Online Commerce & Mobile Payments Landscape

How rural audiences make purchases and how mobile ads influence these decisions

Of the Vietnamese population, 43% use a mobile device to shop. This includes 77% who order their goods online, preferring to have them delivered rather than collecting the goods themselves. However, 82% of users believe that it's safer to shop in the real world and 54% stating that internet security is the primary reason they do not shop online.

When it comes to advertising, local retailers are preferred, and consumers are sceptical that online purchases will match the product's online images. This provides an opportunity for local retailers to adopt a multi-channel sales strategy.

Payment landscape (cash/cashless) and any early indicators of mobile banking/mobile wallet opportunities

According to the State Bank of Vietnam, less than half the population have bank accounts, with the ratio especially low in rural areas. As mobile devices spread, and communication infrastructure improves, e-payment is set to become even more popular. To tap into this growth VNG, operator of the country's most popular messaging app Zalo, had plans to install terminals for its ZaloPay e-payment service at 1,000 locations by the end of 2018.

Vietnam's e-payment pioneer, MoMo, has a nationwide network of 4,000 agents, who provide basic banking services such as deposits, withdrawals, and money transfers, making the service popular in rural areas. Migrant workers, for example, can deposit cash into their MoMo accounts and transfer it to other locales not serviced by ATMs.



PETER CHRISTOU, EXPERT
SOLUTIONS DIRECTOR,
KANTAR WORLDPANEL

"With increasing connectivity in rural Vietnam, there is huge potential for online shopping to grow. Today, local retailers are still preferred, providing an opportunity for local retailers to adopt a multi-channel sales strategy."

Research Data References

Adtima Understanding Rural User Study, Adtima MMA Pull Out Data, E-payment soars in Vietnam as a solution to skimpy bank coverage

Implications: How Marketers Can Reach Rural Vietnam Audiences Effectively

Vietnam is a mobile first market. The relevance of online advertising plays a critical role in conversion, and marketers need to leverage these two factors to reach rural Vietnamese audiences effectively.

Leveraging the aspirations of the rural Vietnamese, marketers should tailor their message to showcase how their products and services can help them achieve their goals and aspirations. Marketers should create advertising that showcases a transformation of image, stature, identity, body, skills, and knowledge. They should also illustrate progress, such as providing examples of rural Vietnamese achieving life goals including owning a vehicle, getting a good job, or achieving public recognition.

As rural Vietnamese leverage the internet for communication, entertainment, and education, aligning their messaging with these three categories can help marketers derive messages that appeal to their target audience. Curating their content so that it is organised by interests, skills, or knowledge can help marketers achieve these goals.

Segment your database

Geographic segmentation of your CRM is key to ensuring that relevant messaging is reaching the right audiences. The ability to target rural audiences and nurture them over time, via marketing automation platforms, will ensure that your tailored messaging to rural audiences is effective at every touch point.

Refine your mobile ad strategy

It's clear that mobile needs to be a fundamental marketing channel. A mobile strategy requires careful consideration in order to reach target audiences with meaningful information, which enables rural consumers to make decisions based on their needs and desires. This can be achieved by using the correct tools to reach the right audiences.

Tailor your messaging for context & usefulness

Low relevancy of ads, such as products that are too expensive or unavailable in their area translates into low purchase conversion. Ads



NGUYEN ANH TUAN,
MANAGING DIRECTOR,
ADTIMA

"With over half of the Vietnam population living in rural areas, this untapped market needs a dedicated marketing approach to unlock its potential. With increased smartphone usage and the popularity of e-payment solutions, the rural Vietnamese are a prime market for growth. As smartphone penetration is at 68% in this demographic and growing, there are unlimited opportunities for mobile advertisers to craft relevant ads and grow their revenues."

must feel useful, relatable, and create an emotional connection to resonate. Brands should consider tailoring communications for urban and rural as two separate audiences to increase resonance and purchase conversion.

Target your Search ads

While rural audiences are sometimes less receptive to Search ads compared to their urban counterparts, a substantially higher percentage of rural users click through on Search ads. This indicates there is merit in tailoring Search ads specific to rural audiences.

Align digital experiences with physical retail experiences

With a high percentage of rural audiences researching online but preferring to buy in physical stores, marketers need to ensure a seamless experience between offline and online

channels. Importantly, they need to ensure that the products and services advertised to rural audiences are available to them in physical stores in their local area.

Online also has a role to play in increasing choice for rural consumers and overcoming the lack of modern retail outlets, via a smooth and trusted online buying experience. Products that rural consumers are interested in are not always available at physical stores, so online retail can meet this need and drive demand.

Leverage video for content marketing

With 82% of rural Vietnamese using YouTube to relax, there is a strong opportunity to reach them with video. However, only 11% of rural Vietnamese use YouTube for learning, which means marketers need to strategize meaningful and relevant ways to engage and interact with their target audience via video content.





Conclusion

“The State of Mobile in Rural Vietnam 2018/2019” report aims to provide valuable insights on mobile for rural audiences in Vietnam, specifically in terms of digital behaviours, payment methods, and responsiveness towards online advertising, especially on mobile.

The report draws out implications for marketers to utilize for their upcoming marketing campaigns in 2019. With Vietnam being a mobile first market, the relevance of online advertising plays a critical role in engaging rural Vietnamese prospects, and marketers need to leverage this effectively in order to reach these target audiences.

Acknowledgements

The Mobile Marketing Association would like to acknowledge the efforts and contributions of the following MMA member companies in producing this report:



www.google.com

Google's mission is to organize the world's information and make it universally accessible and useful. Through products and platforms like Search, Maps, Gmail, Android, Google Play, Chrome and YouTube, Google plays a meaningful role in the daily lives of billions of people and has become one of the most widely-known companies in the world. Google is a subsidiary of Alphabet Inc.

About Nitin Gajria, Country Director, Vietnam / Cambodia / Laos; Google Asia Pacific

Nitin Gajria is the Country Director for Google Vietnam / Cambodia / Laos. He has been at Google for 5 years, prior to which he spent 13 years in Brand Marketing at Procter & Gamble and Mead Johnson working across the Asia Pacific region. Nitin is keenly interested in technology start-ups and is an angel investor himself. Nitin is a husband and a father. He hails from Mumbai in India, completed his education in Kolkata, India and has lived and worked in Singapore and Sydney, Australia over the last 18 years. He spends most weeks in HCMC or Hanoi meeting interesting people.



Leader in mobile
adtima.vn

Adtima is the number one premium publisher in Vietnam. We own the largest ecosystem of internet platforms which play essential parts in Vietnamese daily life, from entertainment (Zing MP3, Zing TV), news (Zing.vn, Bao Moi) to messaging (Zalo). Adtima is also a thought-leader in mobile marketing industry that not only provide brands credible platforms to increase their credibility and reach but also valuable insights to develop marketing and business strategy.

About Mr. Nguyen Anh Tuan, Managing Director

Tuan is one of leading experts in the technology and digital media industry. He has consulted and developed platforms for many online newspapers, as well as created digital products attracting millions of users. He is also the co-founder and CEO of Baomoi.com, a leading news and media company in Vietnam with successful investment from IDG Ventures.



dentsuX relaunched as a global network from erstwhile dentsu media around June 2017. dentsuX relies on the power of strong belief in “Experience Beyond Exposure”. Hence dentsuX Vietnam has evolved by solidifying the in-house business units of Communication Design (creative services), Sports Business Division, Talent Management, and Content & Digital/Technology with the aim to become a pioneering full-service player in the market along with its strong media expertise in media planning & buying services. As dentsuX, we design experiences to work with, rather than against human nature, we are creating experiences that win.

About Sandip Roy, Chief Operating Officer

As Chief Operating Officer for dentsuX Vietnam, Sandip manages the overall operations of the agency. He has more than 20 years of experience working across agencies in India, Indonesia, Singapore and is currently based in Vietnam for the last 4 years. His major exposure has been managing global clients like P&G & MasterCard in a regional role while based in Singapore and thereafter leading a rapid expansion of Mediacom Indonesia at a later stage.



Kantar Worldpanel is the global expert in shoppers’ behaviour. Through continuous monitoring, advanced analytics and tailored solutions, Kantar Worldpanel inspires successful decisions by brand owners, retailers, market analysts and government organizations globally. With over 60 years’ experience, a team of 3,500, and services covering 60 countries directly or through partners, Kantar Worldpanel turns purchase behaviour into competitive advantage in markets as diverse as FMCG and baby products, among many others.

About Peter Christou, Expert Solutions Director

Peter Christou has worked in FMCG market research for over 11 years and has extensive experience within consumer panels and custom research. Acting as a partner and consultant to his clients, he has serviced a diversified portfolio of international clients in that time and has always displayed great passion, commitment, actionable insights and partnership spirit. He started out in the UK and since October 2014 in Vietnam, always with Kantar Worldpanel. In his current role, Peter is working collaboratively with clients to help them utilize and connect panel data in order to gain competitive advantages and drive successful brands, through providing in-depth shopper, media and consumer insights, actionable business ideas and a valuable business partnership for his clients.



Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers Watch and Buy. Nielsen's Watch segment provides media and advertising clients with Total Audience measurement services across all devices where content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen provides its clients with both world-class measurement as well as analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries that cover more than 90 percent of the world's population.

About Khoa Doan, Director, Consumer Insights

Khoa joined Nielsen Vietnam in 2009 and is currently leading the Consumer Insights Business Development team to assist clients across FMCGs, financial institutions, mobile/telecoms and technologies, retailer in understanding consumer insights to build and grow strong brands, fine-tune and develop new products and services to meet consumers' unmet needs, and evaluate the compliance towards the organization processes/ procedure to ultimately grow the business in Vietnam. Khoa's expertise in Consumer Research spans across a wide range of key research areas including U&A, brand tracking, product and concept test, market sizing, branding & segmentation, and customer satisfaction studies across qualitative & quantitative aspects.



Infocus is a provider of market research services, with a mission to provide research insights that are focused, faster and efficient. Obtaining the answers you need to make business decisions should not be as slow, unreliable, or expensive as it is now. Infocus Mekong Research was born out of our clients wish to deliver more actionable insights and business driven issue-based research "better, faster & cheaper" for Vietnam, Myanmar, Cambodia and Laos. We focus on the understanding of your business issues so we can provide the right solutions and expertise to uncover the insights you need to make impactful decisions that will drive growth.

About Ralf Matthaes, Founder & Managing Director

Ralf has lived in and researched Vietnam since 1994. After 20 years of Corporate life, Ralf established Infocus Mekong Research, Vietnam's first dedicated smartphone-based research agency, specializing in consumer trends, market entry and strategic brand development and digital testing.

Early in 2018 Ralf created a Joint Venture with Miaozhen Systems, China's largest digital advertising monitoring and planning group and now offers world class Digital ROI Management in Vietnam.

In 1996, Ralf established TNS Vietnam, followed up by Kantar Media & Worldpanel, TNS Cambodia & Myanmar and was in 2013 was promoted to Regional Managing Director - Mekong Region: Cambodia | Laos | Malaysia | Myanmar | Thailand | Vietnam. Ralf specializes in market entry, retail, FMCG and media for the greater Mekong region.



About the Mobile Marketing Association

www.mmaglobal.com

The Mobile Marketing Association (MMA) is the world's leading global non-profit trade association comprised of more than 800 member companies, from nearly fifty countries around the world. MMA Member companies hail from every faction of the mobile media ecosystem. Our consortium includes brand marketers, agencies, enabling technologies, media companies and others. The MMA's mission is to accelerate the transformation and innovation of marketing through mobile, driving business growth with closer and stronger consumer engagement.

About Tam Phan Bich, Country Manager

Phan Bich Tam is currently the Country Manager of Mobile Marketing Association in Vietnam, Myanmar and Cambodia. Her passion is instrumental in building a strong and cohesive mobile marketing ecosystem that aims to boost mobile as an indispensable medium since 2013. With more than 12 years of experience, Tam has handled many different roles from Sales & Marketing Director, Regional Sales Manager and as CEO in various businesses. Tam is passionate about building community, making impacts, and encourage the application of mobile marketing for business transformation. Tam has been leading CSR Universal Project (Non Profit) and COO for Kolter Awards Program in Vietnam, also lecturing at VietnamMarcom, the most famous marketing school in Vietnam.

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