



Q&Me is online market research provided by Asia Plus Inc.

## Digital marketer landscape in Vietnam (2020)

Asia Plus Inc.





# Overview

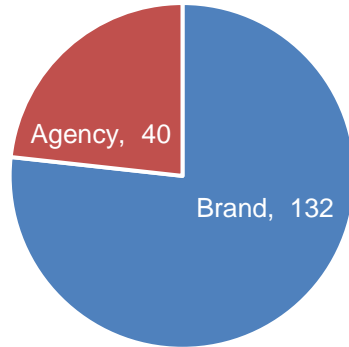
Vietnam advertisement market is in the middle of huge shift from the traditional to digital, as smartphone changes the lifestyle of consumers and many spend hours online daily. Also the market faces the impact of Covid-19 to capture the lifestyle changes of Vietnamese consumers.

Q&Me, market research service operated by Asia Plus Inc, has conducted the survey among 172 enterprises (132 brands, 40 agencies) in Nov 2020 to understand their marketing activities, relationship between brands and agencies, as well as the issues of Vietnam digital marketing industries.

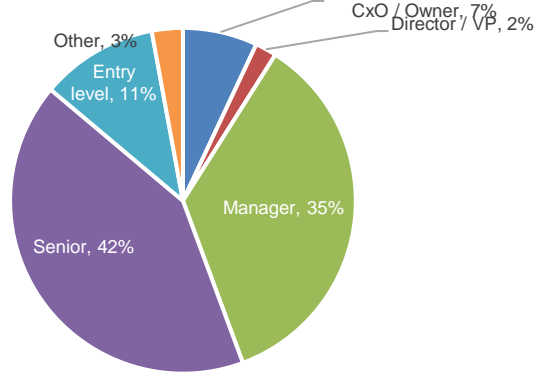
This is the third time that we conduct this survey, followed by 2018 and 2019.

# Respondent profile (N=172)

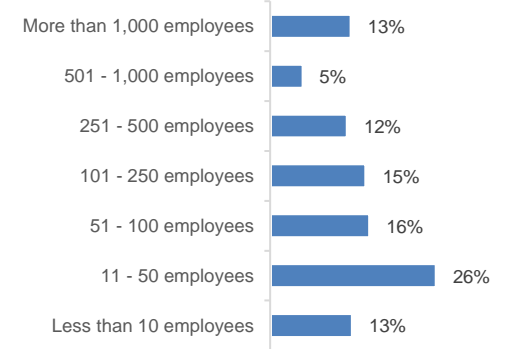
Type of respondents



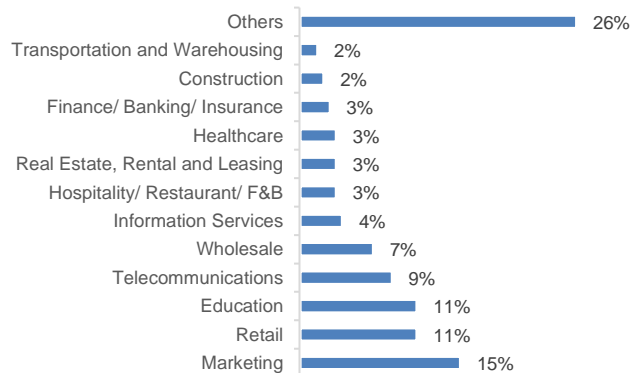
Title levels



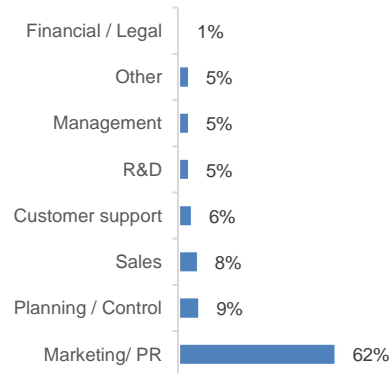
Company size



Industry



Role





A top-down view of a collaborative workspace. Three laptops are open on a light-colored wooden table. Two mugs, one blue and one clear, are placed on the table. A large, colorful, ornate mat with a central geometric design and the word 'KALEIDICO' is spread across the table. Several hands are visible, interacting with the laptops and the mat. A semi-transparent dark grey banner is overlaid at the bottom of the image.

Digital marketing activities



# Digital marketing activities by Vietnam enterprises

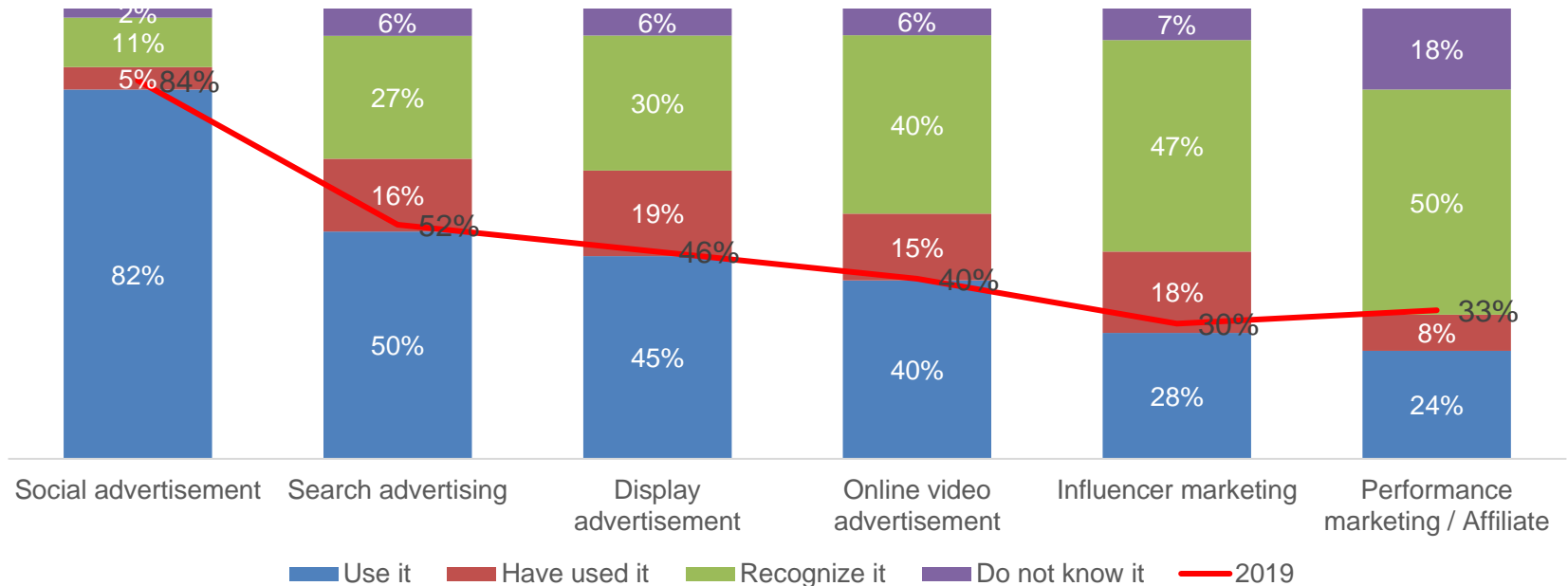
Social marketing like Facebook is used by over 80% of the companies. Almost all of the companies own Facebook accounts as their branding and promotion strategy. Facebook is indispensable tools for Vietnam enterprises.

Other than that, YouTube also remains one of the popular media for the ads distributions due to high media spending among Vietnamese.

One characteristics among Vietnam digital marketing is the operations on their own. 74% of the companies who run Facebook ads manage the operations themselves. Vietnamese enterprises tend to manage their operations in-house as the cost saving solutions.

# Popular digital marketing

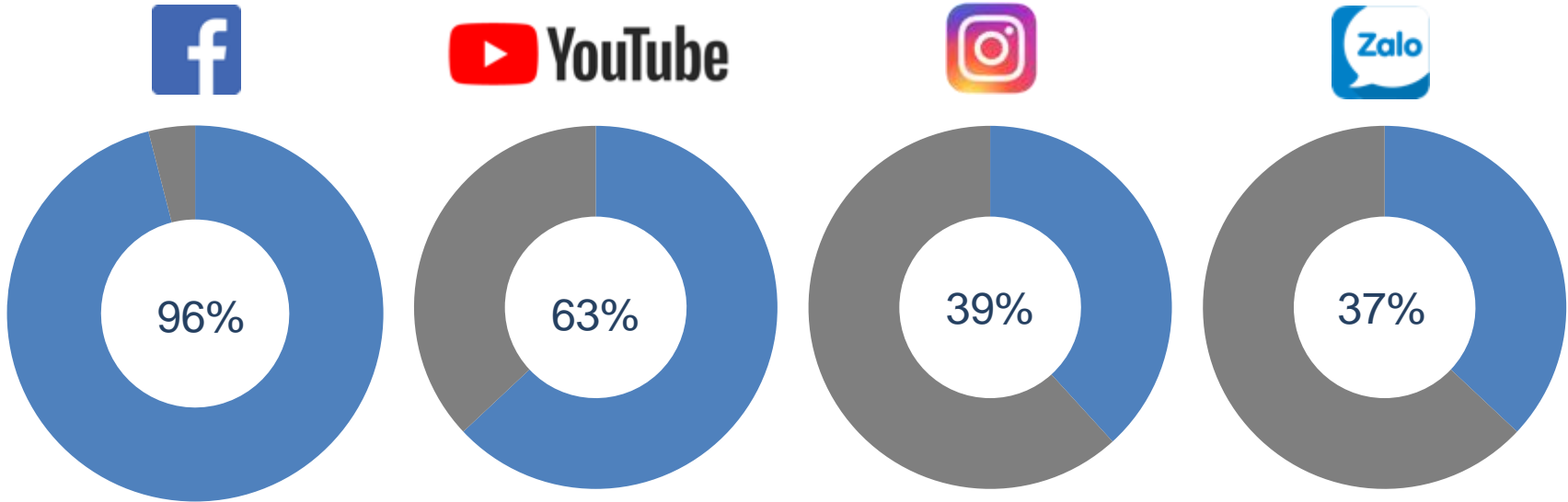
Social advertisement is by far the most popular methods among Vietnamese enterprises. Also half of the enterprises focus on search-related advertisements. Display / videos are also popular with the help of the services form Google.



Q. Please choose all the digital marketing advertisement that you spend your money on in last 12 month?

# Digital media in use

96% of the enterprises manage their own Facebook pages. Facebook is the standard communication tools for Vietnamese enterprises. 63% owns YouTube accounts. Instagram is rising but still the account ownership is limited to 1/3 of the enterprises.







Social media marketing





# Social media marketing among Vietnam enterprises

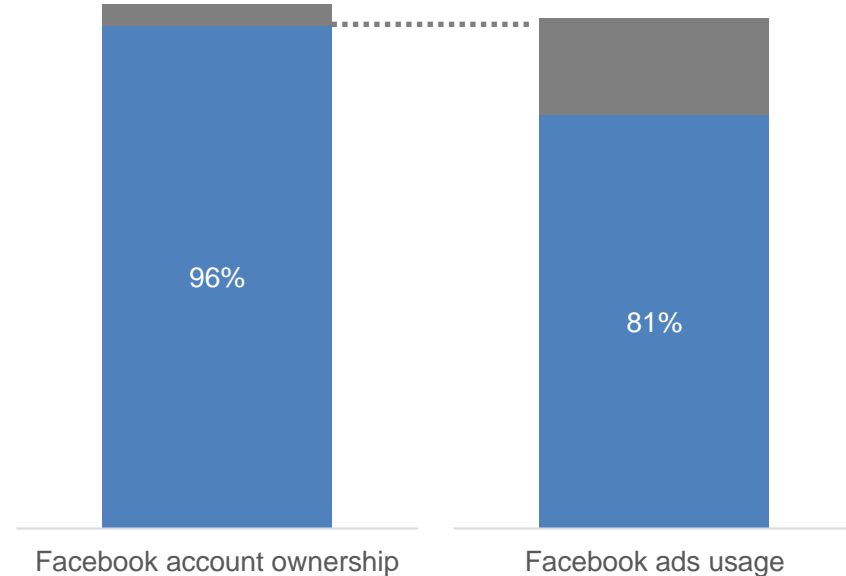
Facebook is a standard tools among Vietnam enterprises for their communications. Due to its easiness and effectiveness, Facebook ads is one of the most common marketing tools, and 81% of the enterprises that own Facebook accounts use it

The usage of Facebook marketing is for the branding such as branding and campaigns. The frequency of the post is very high among these companies with the aim to capture the potential users into conversions.

74% of the enterprises manage Facebook ads on their own as the tool is easy enough for them to manage. The large enterprises tend to outsource it for the professional operations.

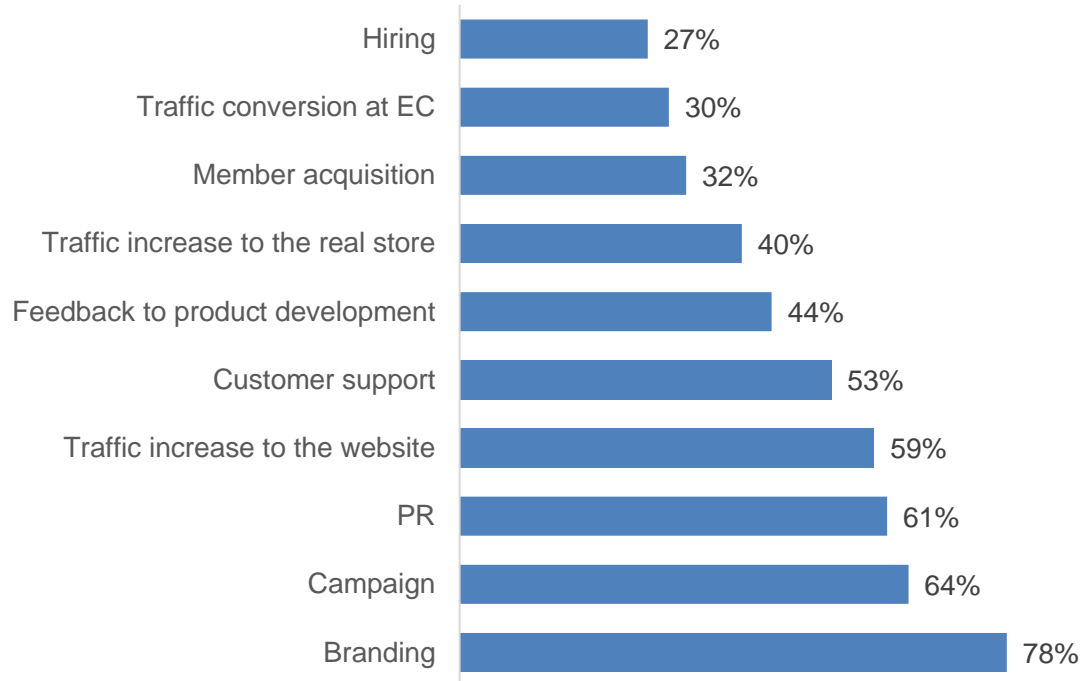
# Facebook account and ad usage

Out of 96% of the enterprises that has Facebook accounts, 81% run Facebook ads. Facebook ads are deeply penetrated among Vietnam digital marketing



# Facebook page usage objectives

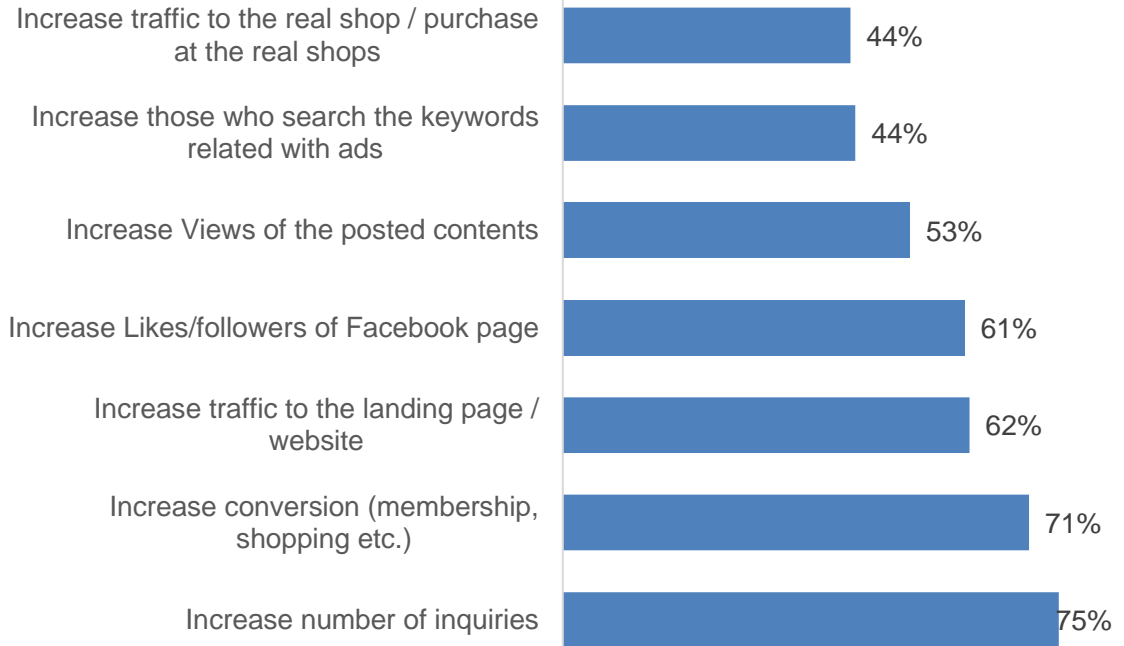
The objectives are versatile. The top motivations are the mix of branding / PR + campaign.



Q. Please choose the objective of Facebook corporate account?

# Facebook page usage motivations

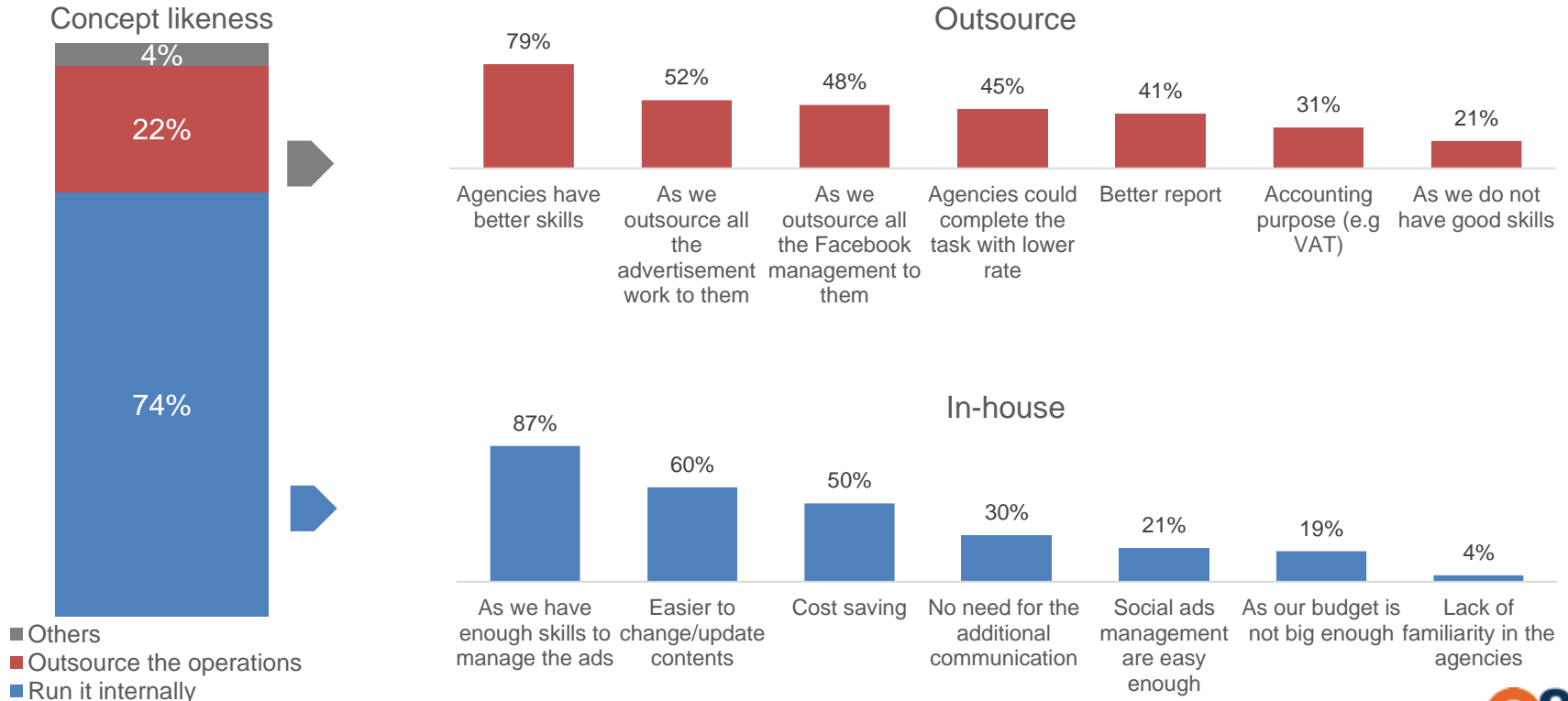
Facebook is used as the triggers for the next actions such as inquiries, membership, website access, due to the very big audience scale.





# Facebook ads operations and reasons

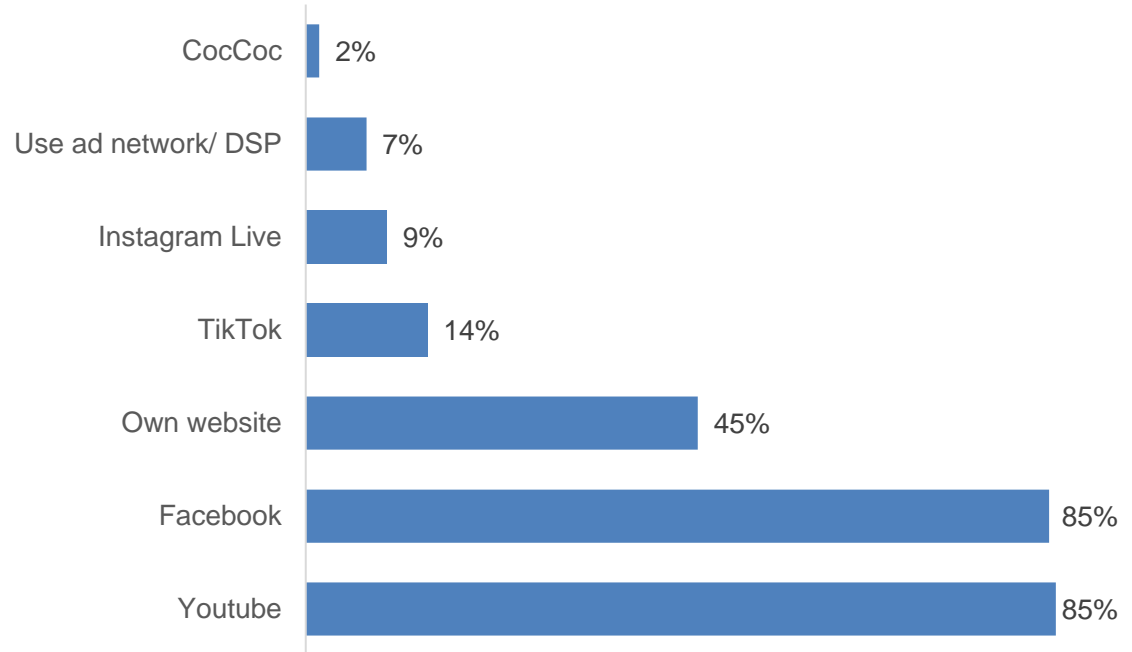
74% manages Facebook ads operations on their own due to its easiness of running ads and cost savings. Outsourced enterprises do that for the better skills.



Q. How did you run Facebook ads? / What are the reasons for the previous answers?

# Popular video advertisement platform

YouTube and Facebook are the two giant platform to run the video contents. Own website is less popular as only less than half enterprise do that.



Q. What medias do you use for your online video marketing?



Covid-19 impact on marketing

# Covid-19 impact on Vietnamese marketing

Covid-19 has impacted many lives of Vietnamese, and Vietnamese enterprises need to change their strategies.

Except for a few companies that got the benefit of Covid-19 such as foods and health care, many enterprises are forced to cut their budgets and their spending goes to online.

We see the clear trend that the activities such as magazines, newspaper and outdoors are cut while digital marketing budgets remain as almost equal as before.

On the other hand, TV is used by 10% of the respondent enterprises and the media remains as strong as before.

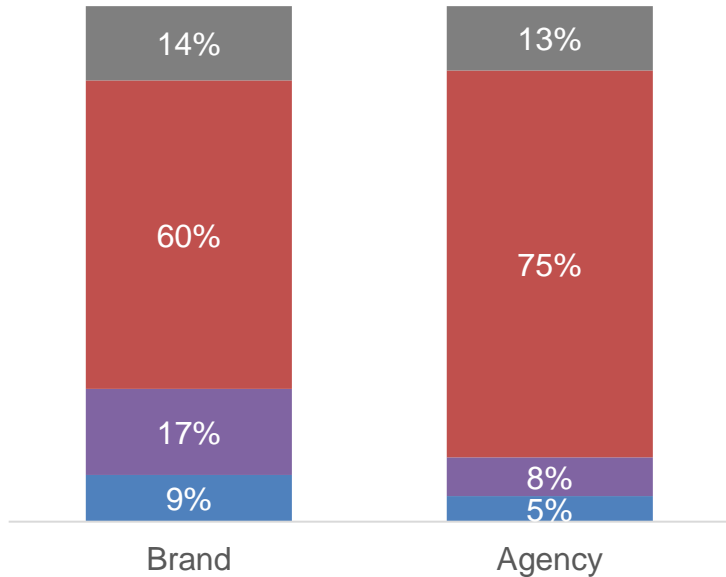




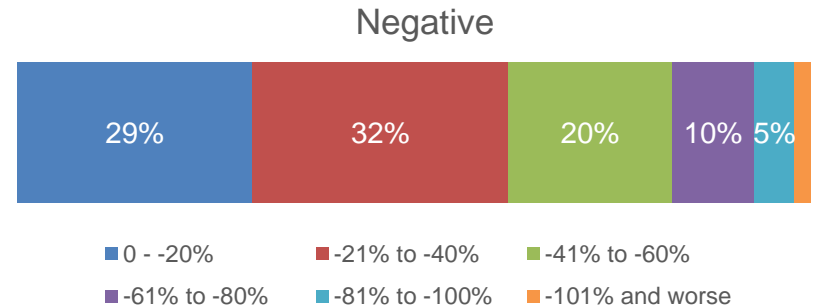
# Covid-19 impact on business

60% of brands and 75% of the agencies are hit by Covid-19 negatively, while the ratio that receives the business opportunities more are 26% and 13% respectively

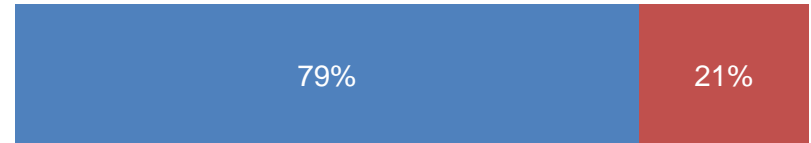
## Impact on business



## Business impact by %



## Positive



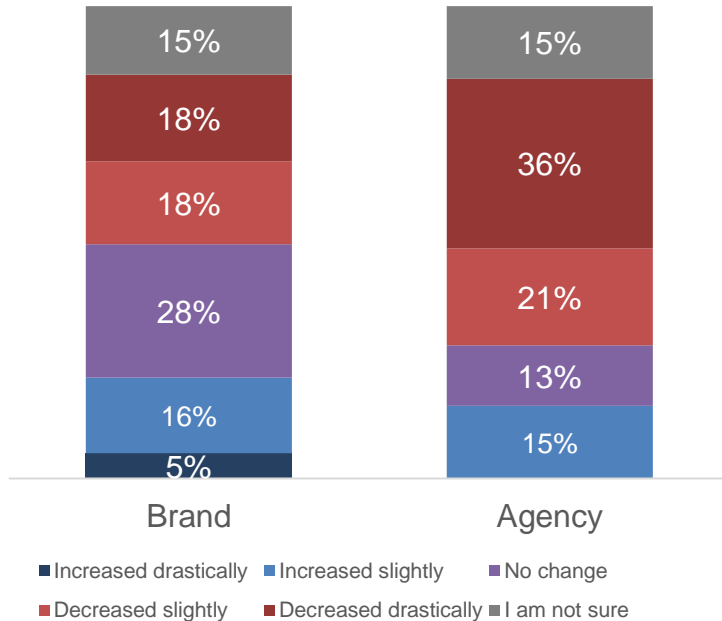
■ Positive business impact ■ No change  
■ Negative business impact ■ Others

■ 0 - 20% ■ 21% to 40%

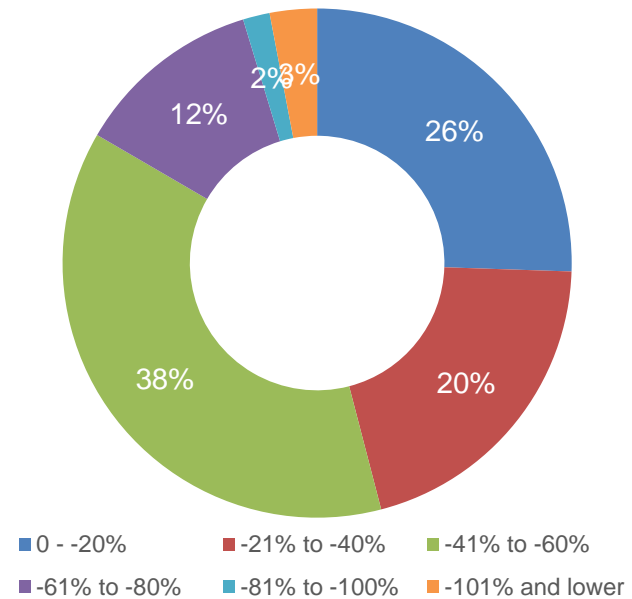
# Covid-19 impact on ad budget

36% of brands and 57% of the agencies had reduced their advertisement budgets while 21% of the companies had the opportunities to increase it.

Impact on ads budget



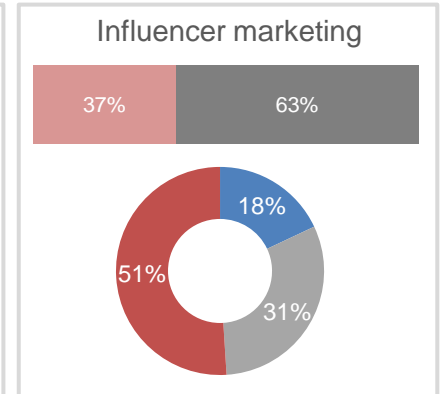
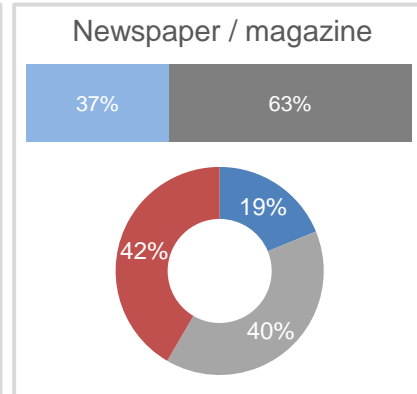
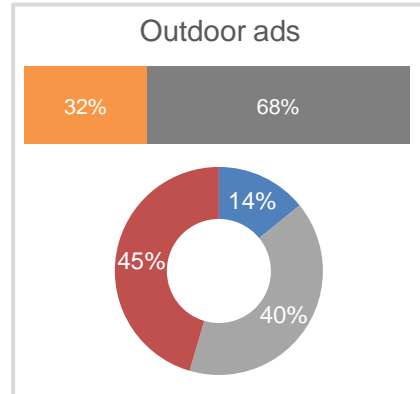
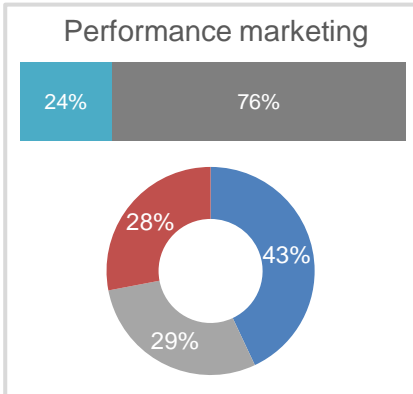
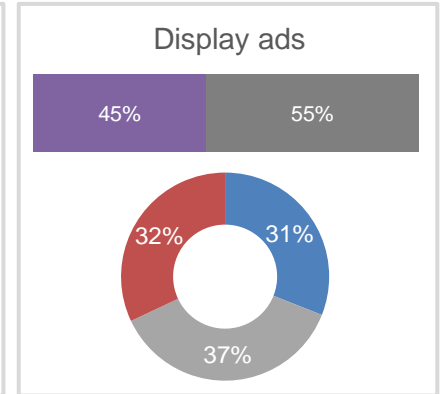
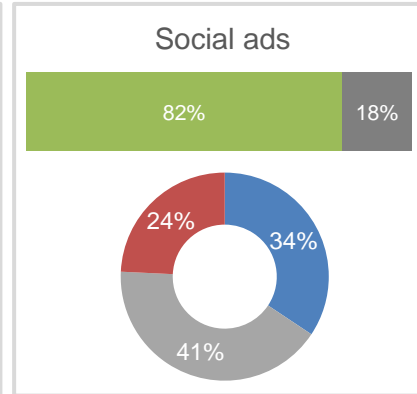
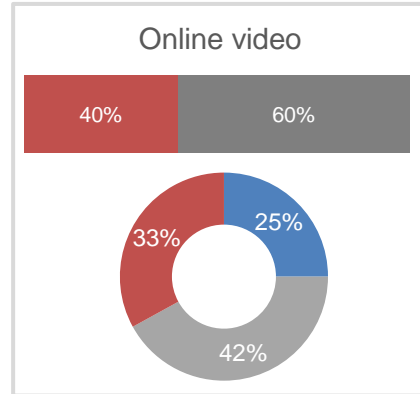
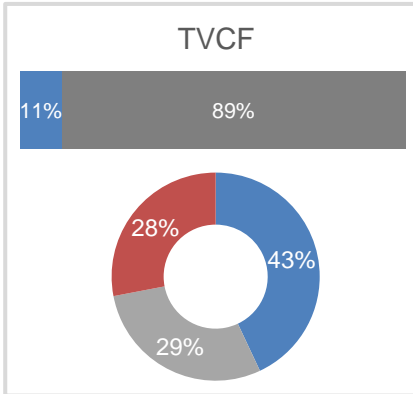
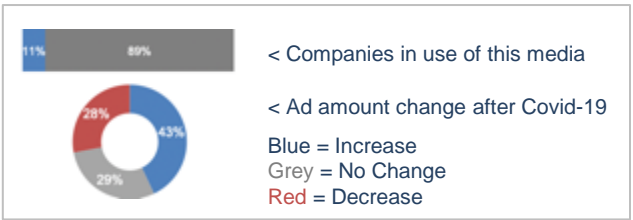
Business impact by %



Q. How does Covid-19 impacted your advertising budget? / How does Covid-19 impacted your client advertisement budget? / What is applicable to you as to the advertisement increase / decrease compared with pre-Covid 19 timing?

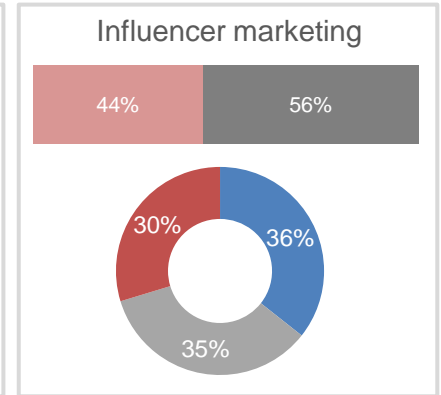
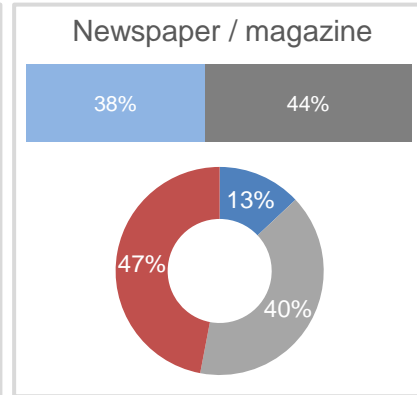
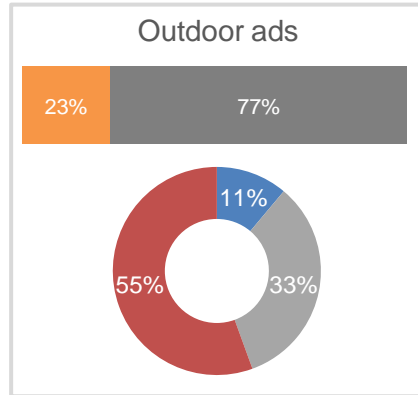
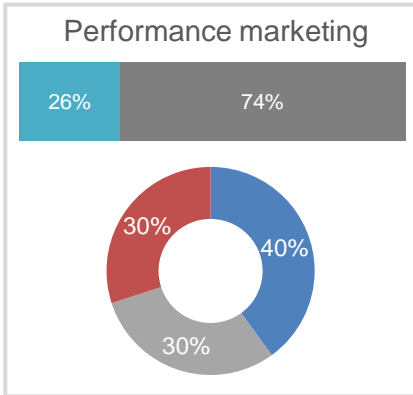
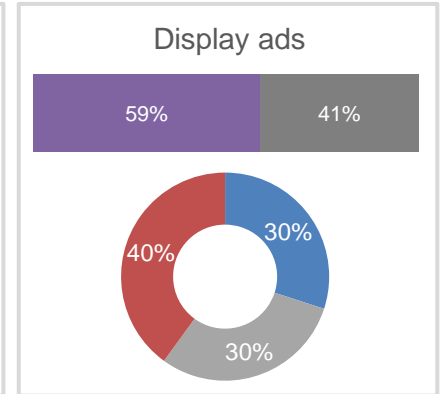
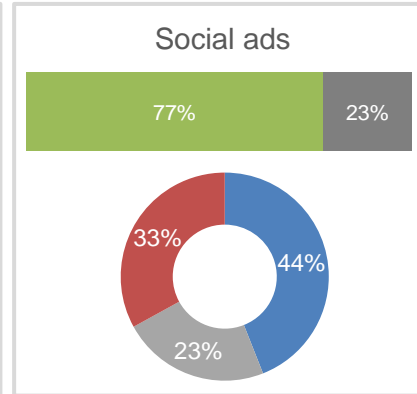
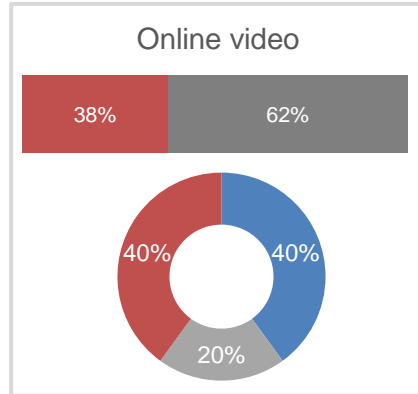
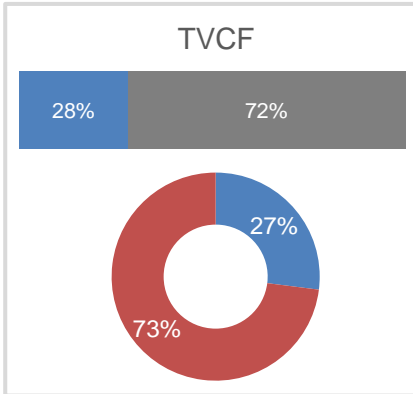
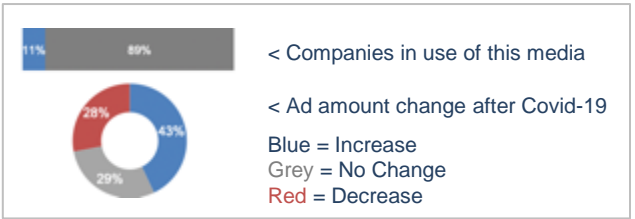
# Media impact - Brands

Traditional (Outdoor, newspaper, magazine) are cut while digital struggle to maintain



# Media impact - Agency

Traditional (Outdoor, newspaper, magazine) are cut while digital struggle to maintain

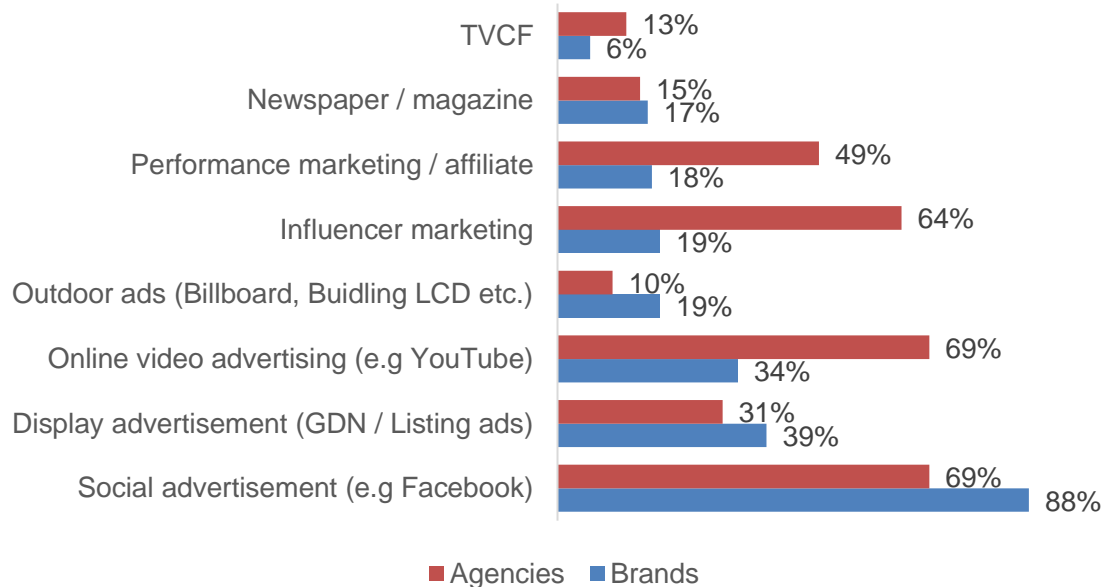






# Service that would have higher demands

While brands rely on social advertisements, agencies see more of the opportunities in varieties of the media. Online video is one of the things. Also, Influencer marketing / performance marketing has the gaps between agencies and brands probably due to the gap of the knowledges between two.

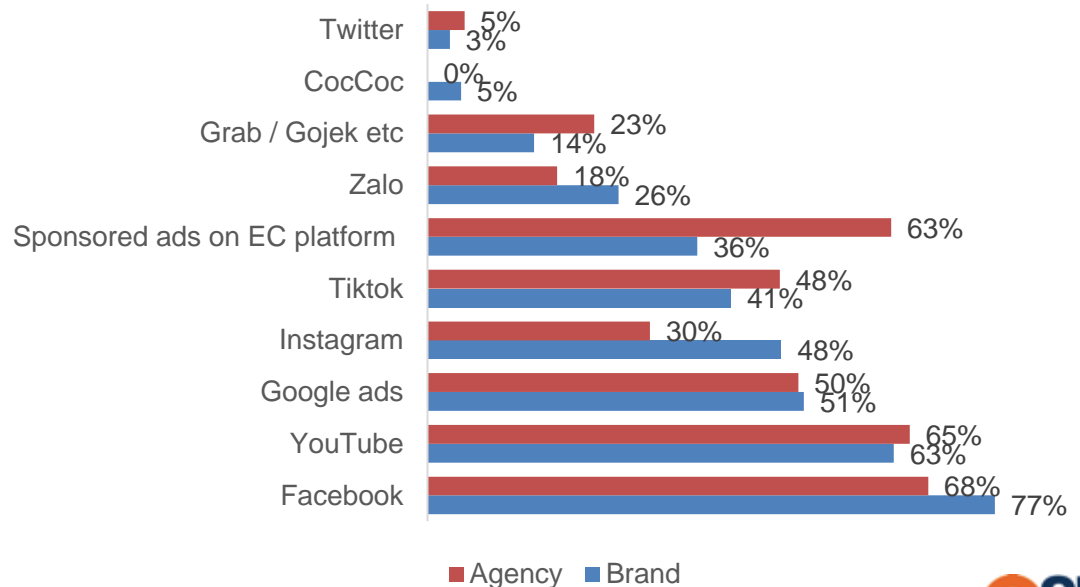


Q. (Brand) Please choose if there are anything that you would like to focus on now? / (Agency) Please choose if there are anything that the demand will increase



# Media that would have higher demands

While Facebook and YouTube remain as the two most popular media that both agencies and brands pay attention to, there are gaps as to how the opportunities are seen for EC platform. Agencies pay attention to the EC platform ads more, seeing the current rising transactions as the next opportunities.





Brand / Agency relationship



# Agency / brands relationships

Brands require a variety of support in order to make their marketing successful.

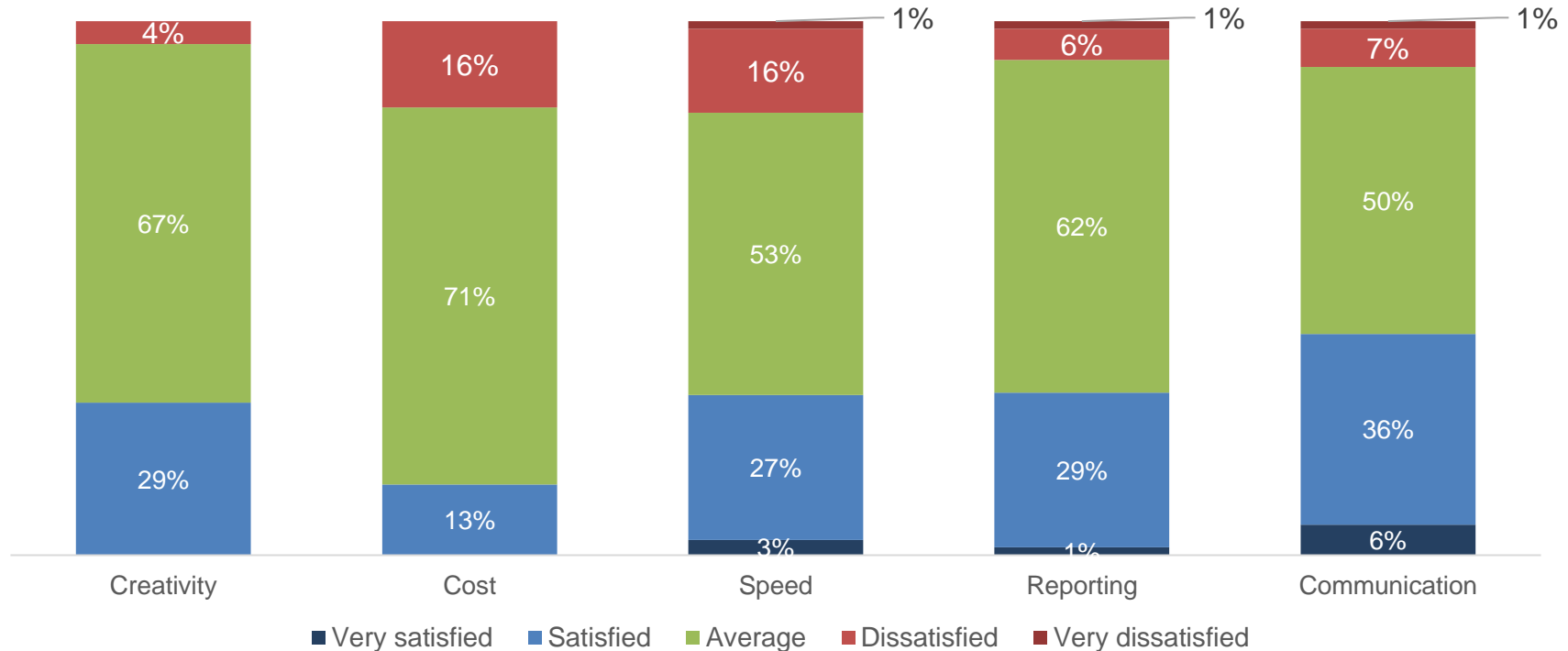
Brands have relatively good evaluations as to what agencies offer. They are satisfied with communications, reporting and the speed, while they wish the cost be lower.

Agencies, on the other hands, may feel that the information from the brands are not good enough. They are not happy with the briefing quality nor some are unhappy with how brands communicate.



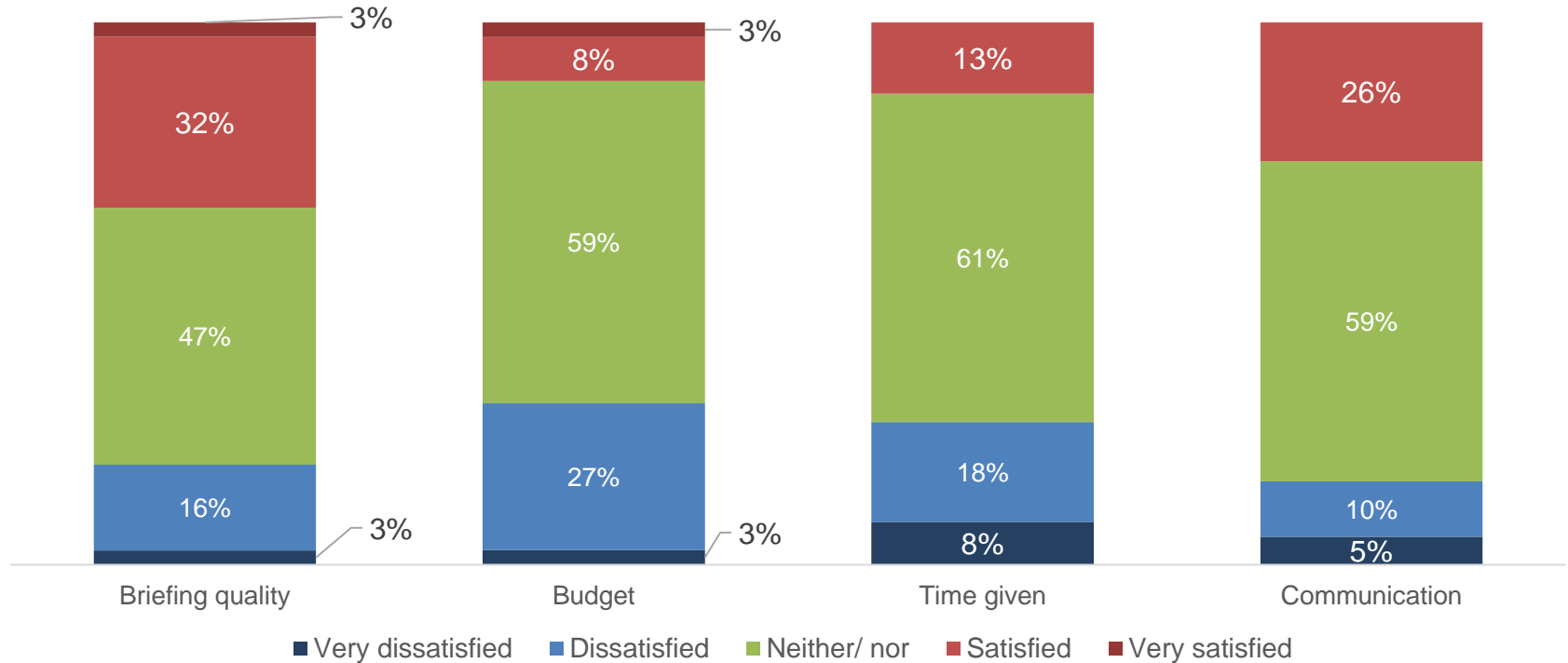


# Agency evaluation by brands



Agencies are rather happy with communication and reporting skills but wish cost could be more affordable.

# Brands evaluation by agency



Agencies wish to have the better briefing and the communications. The evaluations of the communication between brands and agencies are different.



Current issues of digital marketing

# Vietnam digital marketing in the future

Digital marketing in Vietnam is popular due to the better targeting and visibilities to see the effectiveness by data. On the other hand, they feel that digital media is not a perfect solutions when they aim at the elderly groups or the rural audiences.

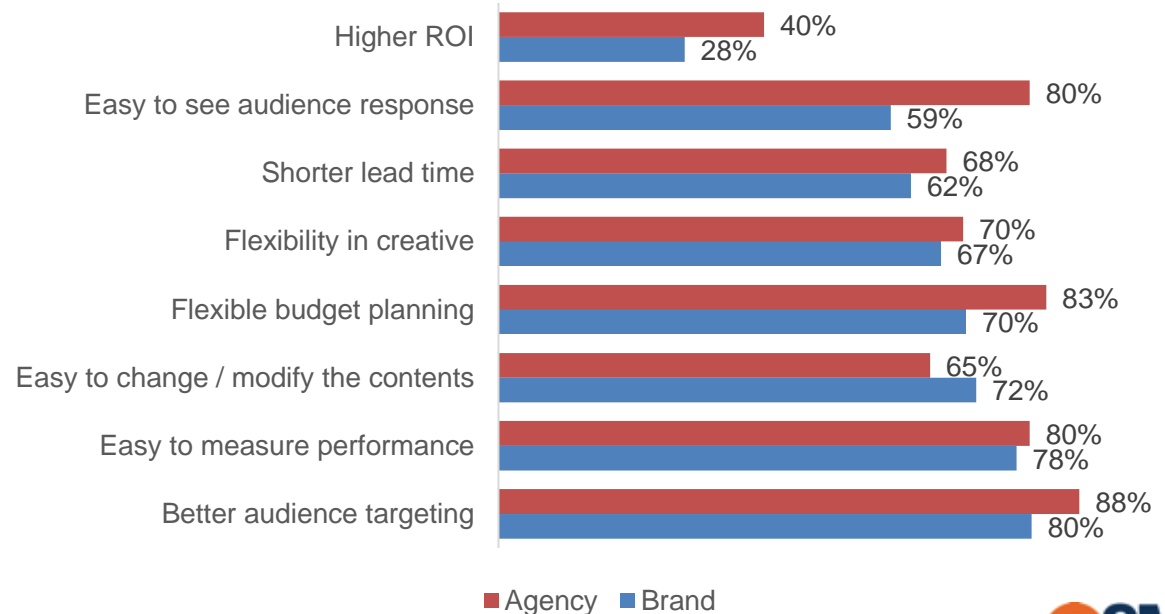
The marketers / agencies feel that they wish to have more opportunities to learn more of the latest techniques / skills to make their digital marketing better. A the same time, they wish their management have better understanding as to the digital marketing.

Overall their satisfaction in cost and audience reach is high. They wish to have better conversions and also the impact to the real sales impact, not only stopping with with the click / like only activities.



# Digital marketing benefit

Better reach to the target audience, performance measurement are believed to be the benefit of digital marketing in Vietnam. Agencies feel flexible budgeting and the audience response visibility as the unique benefits more than the brands.

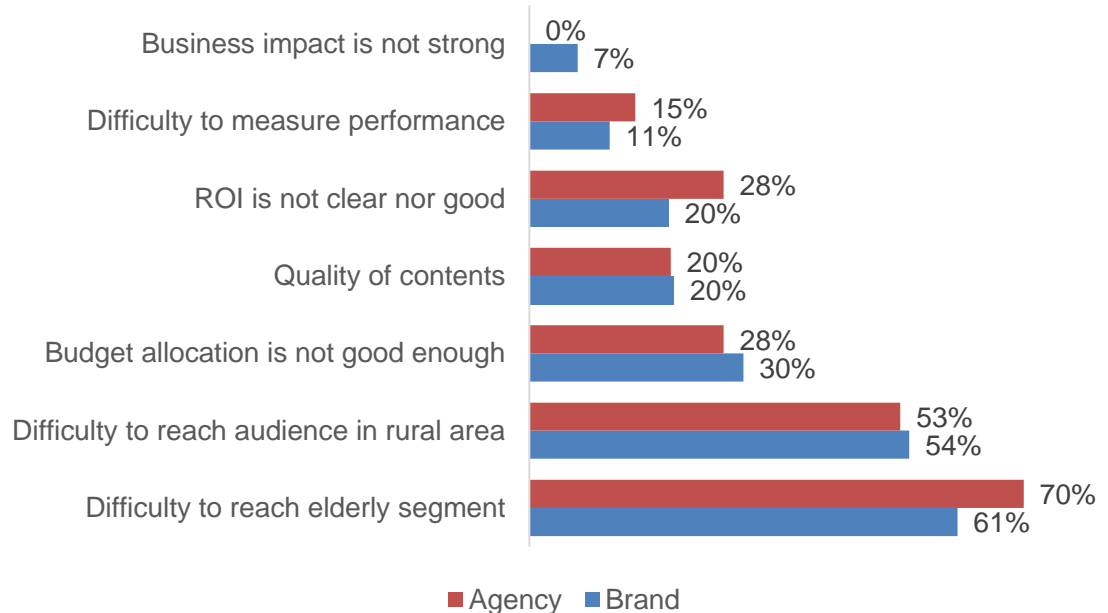


Q. What do you think is the advantage of digital marketing against traditional marketing?



# Digital marketing shortcomings

On the other hands, both of brands and agencies both understand that digital has the limitations in reaching the elderlies and also the rural people. The lack of reach in the elderlies may be an issues as there are some categories such as automotive, healthcare that have higher demands in elderly groups.

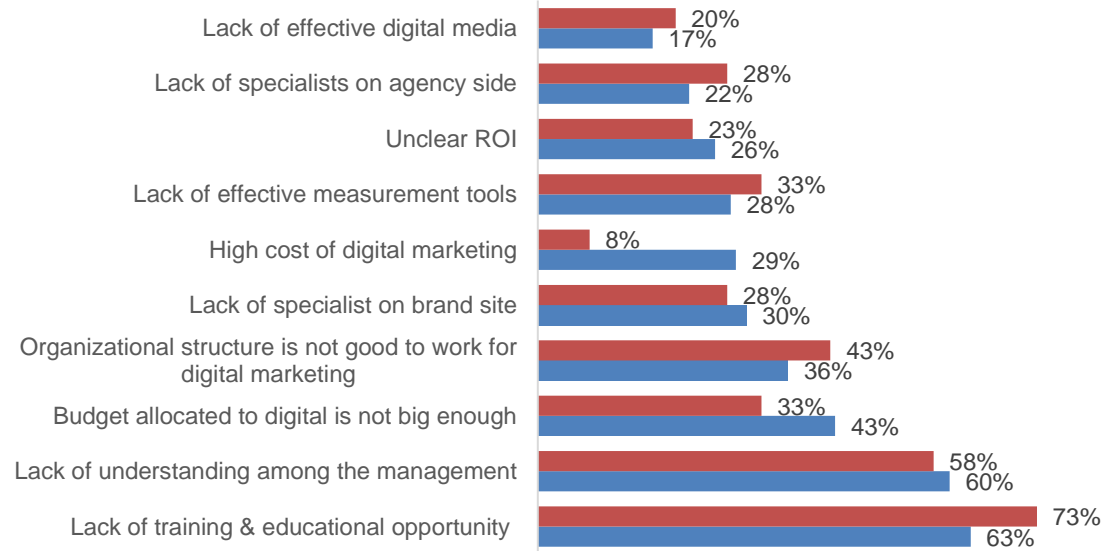


Q. What do you think is the disadvantage of digital marketing against traditional marketing



# Issues of digital marketing in Vietnam

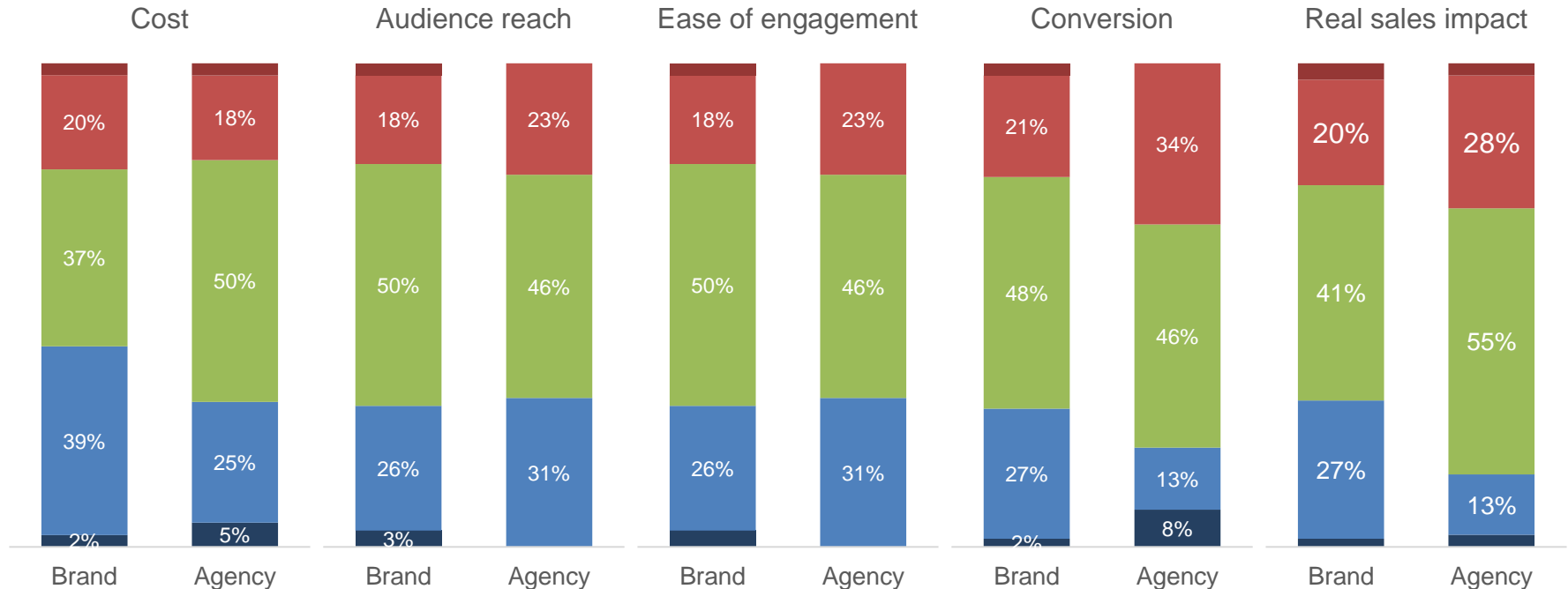
Lack of training, lack of management understanding are thought to be the two big issues for Vietnam digital marketing. Also some feel that the budgets are too much allocated for traditional marketing.



■ Agency ■ Brand

# Agency evaluation by brands

Overall their satisfaction in cost and audience reach is high. They wish to have better conversions and also the impact to the real sales impact, not only stopping with with the click / like only activities.



Q. How much are you satisfied with the following for your digital marketing campaigns within past 12 months?



SEE MORE REPORT HERE: VIETNAM MARKET REPORT COMMUNITY

About Q&Me service