



DIGITAL 2020

VIETNAM

ALL THE DATA, TRENDS, AND INSIGHTS YOU NEED TO HELP YOU UNDERSTAND
HOW PEOPLE USE THE INTERNET, MOBILE, SOCIAL MEDIA, AND ECOMMERCE

we
are
social



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IMPORTANT NOTES ON CHANGES TO DATA

Changes to data sources, underlying data, and reporting methodologies mean that various figures in this report **will not be comparable** to similar figures that we published in previous Global Digital Reports. Wherever such changes affect data in this report, we have included a **◆ COMPARABILITY ADVISORY** in the footnotes of each relevant slide. These changes relate to either (1) a source change, where we have substantially changed the data sources that we use to inform data points; or (2) a base change, where either we or our data providers have made material changes to the ways in which we and / or they collect and / or report underlying data. Wherever such changes occur, we have also endeavoured to re-base the historical data we use for annual or quarterly growth figures, but where we have been unable to re-base historical data, we have included an advisory in the footnotes of each relevant slide. Please see the complete list of data sources at the end of this report for further details.



DIGITAL 2020

GLOBAL DIGITAL OVERVIEW

ESSENTIAL INSIGHTS INTO HOW PEOPLE AROUND THE WORLD USE THE INTERNET, MOBILE DEVICES, SOCIAL MEDIA, AND ECOMMERCE

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DIGITAL 2020

GLOBAL DIGITAL YEARBOOK

ESSENTIAL DIGITAL DATA FOR EVERY COUNTRY IN THE WORLD

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[CLICK HERE](#) TO READ OUR DIGITAL 2020
GLOBAL OVERVIEW REPORT, WITH MORE
THAN 200 PAGES OF ESSENTIAL CHARTS
AND INSIGHTS FROM AROUND THE WORLD

[CLICK HERE](#) TO READ OUR DIGITAL 2020
GLOBAL DIGITAL YEARBOOK, WITH
ESSENTIAL HEADLINE DIGITAL DATA
FOR EVERY COUNTRY IN THE WORLD

CLICK THE LINKS BELOW TO ACCESS OUR FULL SUITE OF GLOBAL DIGITAL REPORTS

GLOBAL OVERVIEW	BOTSWANA	DJIBOUTI	GUINEA	LESOTHO	NEPAL	ST. KITTS & NEVIS	TAJIKISTAN
DIGITAL YEARBOOK	BRAZIL	DOMINICA	GUINEA-BISSAU	LIBERIA	NETHERLANDS	ST. LUCIA	TANZANIA
ABKHAZIA	BRITISH VIRGIN IS.	DOMINICAN REP.	GUYANA	LIBYA	NEW CALEDONIA	ST. MARTIN	THAILAND
AFGHANISTAN	BRUNEI	ECUADOR	HAITI	LIECHTENSTEIN	NEW ZEALAND	ST. PIERRE & MIQUELON	TIMOR-LESTE
ÅLAND IS.	BULGARIA	EGYPT	HONDURAS	LITHUANIA	NICARAGUA	ST. VINCENT & THE GRENADINES	TOGO
ALBANIA	BURKINA FASO	EL SALVADOR	HONG KONG	LUXEMBOURG	NIGER	SAMOA	TOKELAU
ALGERIA	BURUNDI	EQUATORIAL GUINEA	HUNGARY	MACAU	NIGERIA	SAN MARINO	TONGA
AMERICAN SAMOA	CABO VERDE	ERITREA	ICELAND	NORTH MACEDONIA	NIUE	SÃO TOMÉ & PRÍNCIPE	TRANSNISTRIA
ANDORRA	CAMBODIA	ESTONIA	INDIA	MADAGASCAR	NORFOLK IS.	SAUDI ARABIA	TRINIDAD & TOBAGO
ANGOLA	CAMEROON	ESWATINI	INDONESIA	MALAWI	NORTHERN MARIANA IS.	SENEGAL	TUNISIA
ANGUILLA	CANADA	ETHIOPIA	IRAN	MALAYSIA	NORWAY	SERBIA	TURKEY
ANTIGUA & BARBUDA	CAYMAN IS.	FALKLAND IS.	IRAQ	MALDIVES	OMAN	SEYCHELLES	TURKMENISTAN
ARGENTINA	CENTRAL AFRICAN REP.	FAROE IS.	IRELAND	MALI	PAKISTAN	SIERRA LEONE	TURKS & CAICOS IS.
ARMENIA	CHAD	FIJI	ISLE OF MAN	MALTA	PALAU	SINGAPORE	TUVALU
ARUBA	CHILE	FINLAND	ISRAEL	MARSHALL IS.	PALESTINE	ST. MAARTEN	UGANDA
AUSTRALIA	CHINA	FRANCE	ITALY	MARTINIQUE	PANAMA	SLOVAKIA	UKRAINE
AUSTRIA	CHRISTMAS IS.	FRENCH GUIANA	JAMAICA	MAURITANIA	PAPUA NEW GUINEA	SLOVENIA	U.A.E.
AZERBAIJAN	COCOS (KEELING) IS.	FRENCH POLYNESIA	JAPAN	MAURITIUS	PARAGUAY	SOLOMON IS.	U.K.
BAHAMAS	COLOMBIA	GABON	JERSEY	MAYOTTE	PERU	SOMALIA	U.S.A.
BAHRAIN	COMOROS	GAMBIA	JORDAN	MEXICO	PHILIPPINES	SOUTH AFRICA	U.S. VIRGIN IS.
BANGLADESH	DEM. REP. OF CONGO	GEORGIA	KAZAKHSTAN	MICRONESIA	PITCAIRN IS.	SOUTH SUDAN	URUGUAY
BARBADOS	REP. OF CONGO	GERMANY	KENYA	MOLDOVA	POLAND	SPAIN	UZBEKISTAN
BELARUS	COOK IS.	GHANA	KIRIBATI	MONACO	PORTUGAL	SRI LANKA	VANUATU
BELGIUM	COSTA RICA	GIBRALTAR	NORTH KOREA	MONGOLIA	PUERTO RICO	SUDAN	VATICAN
BELIZE	CÔTE D’IVOIRE	GREECE	SOUTH KOREA	MONTENEGRO	QATAR	SURINAME	VENEZUELA
BENIN	CROATIA	GREENLAND	KOSOVO	MONTSERRAT	RÉUNION	SVALBARD & JAN MAYEN	VIETNAM
BERMUDA	CUBA	GRENADA	KUWAIT	MOROCCO	ROMANIA	SWAZILAND	WALLIS & FUTUNA
BHUTAN	CURAÇAO	GUADELOUPE	KYRGYZSTAN	MOZAMBIQUE	RUSSIAN FEDERATION	SWEDEN	WESTERN SAHARA
BOLIVIA	CYPRUS	GUAM	LAOS	MYANMAR	RWANDA	SWITZERLAND	YEMEN
BONAIRE, ST. EUSTATIUS & SABA	CZECH REP.	GUATEMALA	LATVIA	NAMIBIA	ST. BARTHÉLEMY	SYRIA	ZAMBIA
BOSNIA & HERZEGOVINA	DENMARK	GUERNSEY	LEBANON	NAURU	ST. HELENA	TAIWAN	ZIMBABWE



2020 GLOBAL HEADLINES

JAN
2020

DIGITAL AROUND THE WORLD IN 2020

THE ESSENTIAL HEADLINE DATA YOU NEED TO UNDERSTAND MOBILE, INTERNET, AND SOCIAL MEDIA USE

TOTAL
POPULATION



7.75
BILLION

URBANISATION:

55%

UNIQUE MOBILE
PHONE USERS



5.19
BILLION

PENETRATION:

67%

INTERNET
USERS



4.54
BILLION

PENETRATION:

59%

ACTIVE SOCIAL
MEDIA USERS



3.80
BILLION

PENETRATION:

49%



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SOURCES: POPULATION: UNITED NATIONS; MOBILE: GSMA INTELLIGENCE; INTERNET: ITU; GLOBALWEBINDEX; GSMA INTELLIGENCE; EUROSTAT; LOCAL TELECOMS REGULATORY AUTHORITIES AND GOVERNMENT BODIES; SOCIAL MEDIA PLATFORMS' SELF-SERVICE ADVERTISING TOOLS; APJII; KEPIOS ANALYSIS; SOCIAL MEDIA: PLATFORMS' SELF-SERVICE ADVERTISING TOOLS; COMPANY ANNOUNCEMENTS AND EARNINGS REPORTS; CAFEBAZAAR. ALL LATEST AVAILABLE DATA IN JANUARY 2020. **COMPARABILITY ADVISORY:** SOURCE AND BASE CHANGES.



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GLOBAL DIGITAL GROWTH

THE YEAR-ON-YEAR CHANGE IN ESSENTIAL INDICATORS OF DIGITAL ADOPTION

TOTAL
POPULATION



we
are
social

+1.1%

JAN 2020 vs. JAN 2019

+82 MILLION

UNIQUE MOBILE
PHONE USERS



+2.4%

JAN 2020 vs. JAN 2019

+124 MILLION

INTERNET
USERS



+7.0%

JAN 2020 vs. JAN 2019

+298 MILLION

ACTIVE SOCIAL
MEDIA USERS



+9.2%

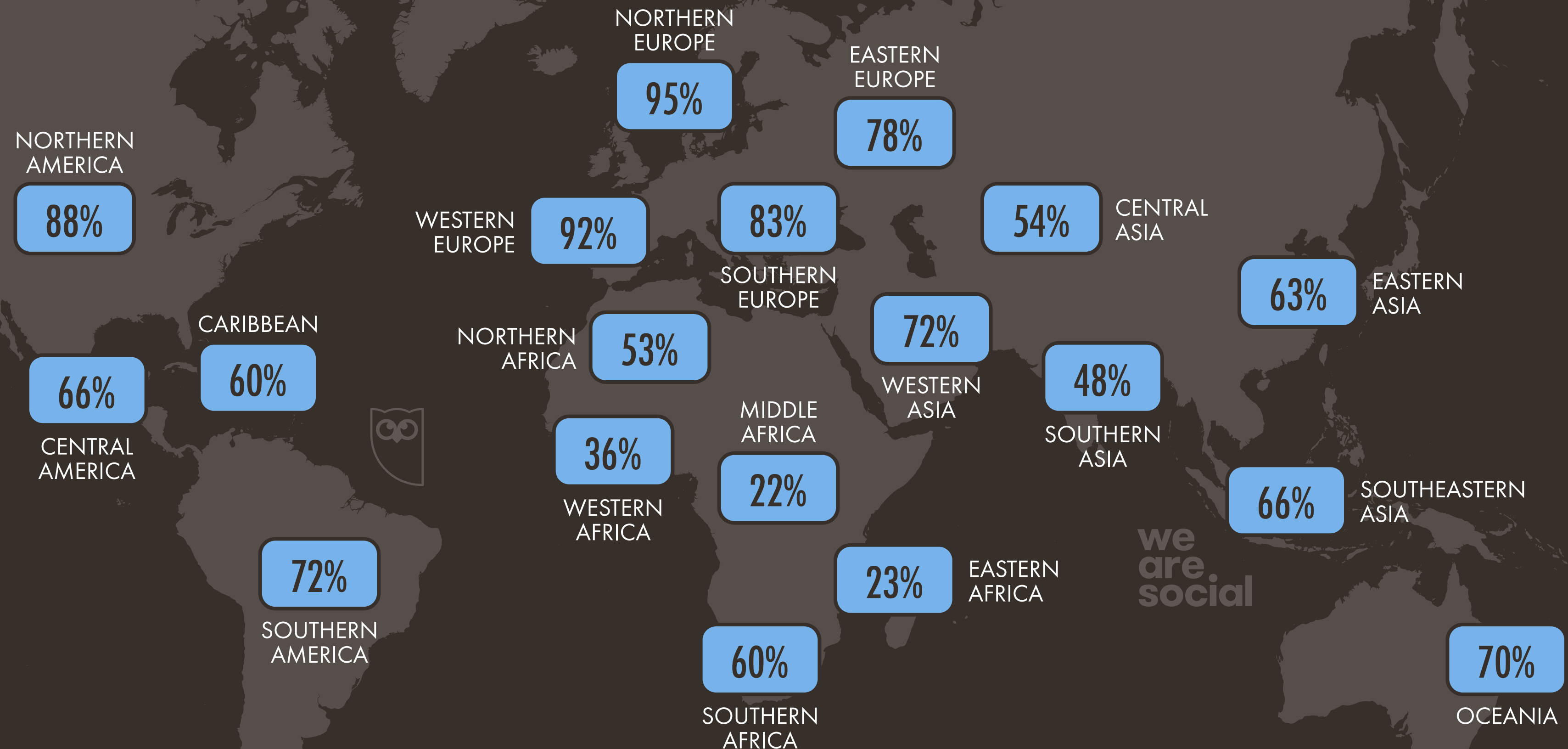
JAN 2020 vs. JAN 2019

+321 MILLION

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INTERNET PENETRATION BY REGION

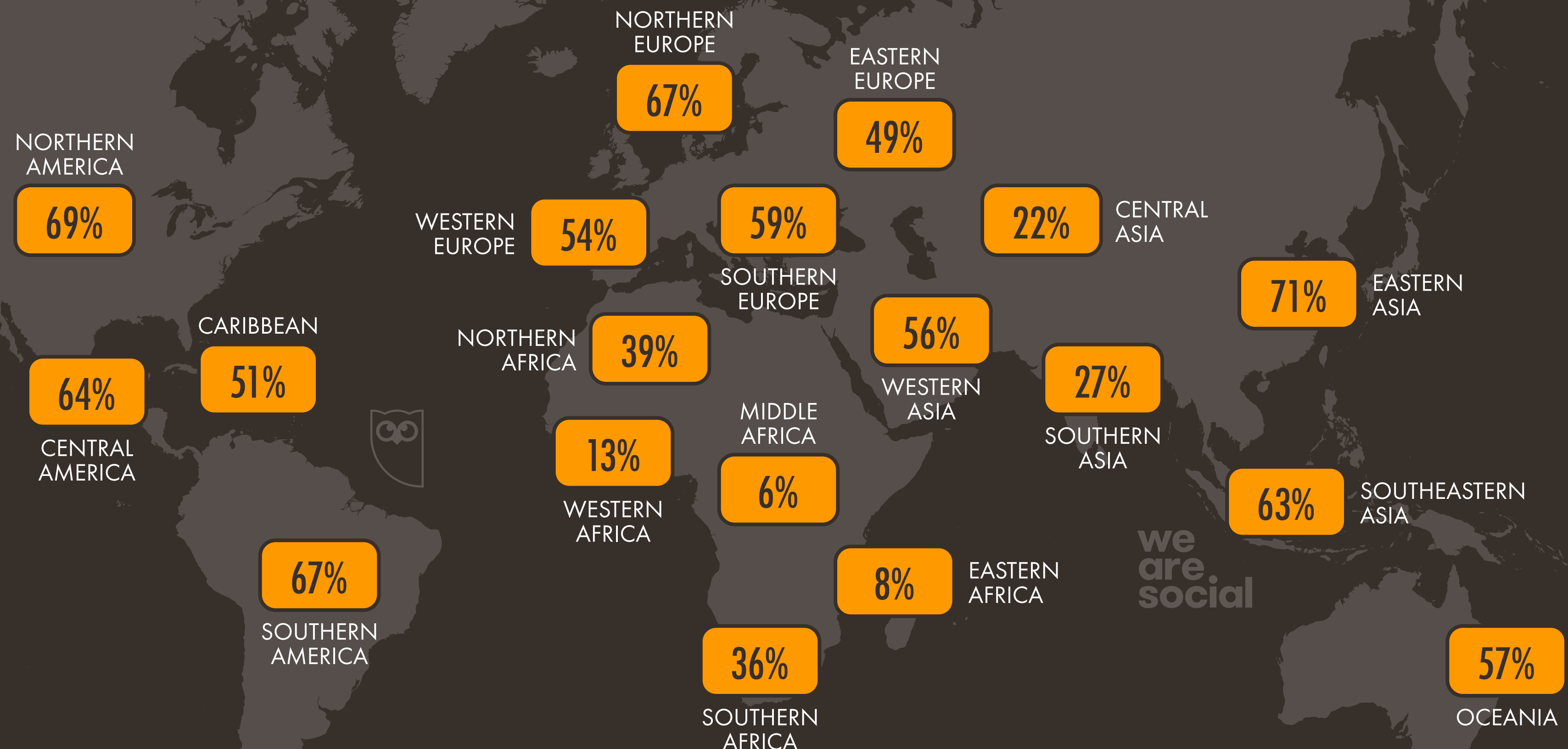
NUMBER OF INTERNET USERS IN EACH REGION COMPARED TO **TOTAL POPULATION***



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SOCIAL MEDIA USE vs. TOTAL POPULATION BY REGION

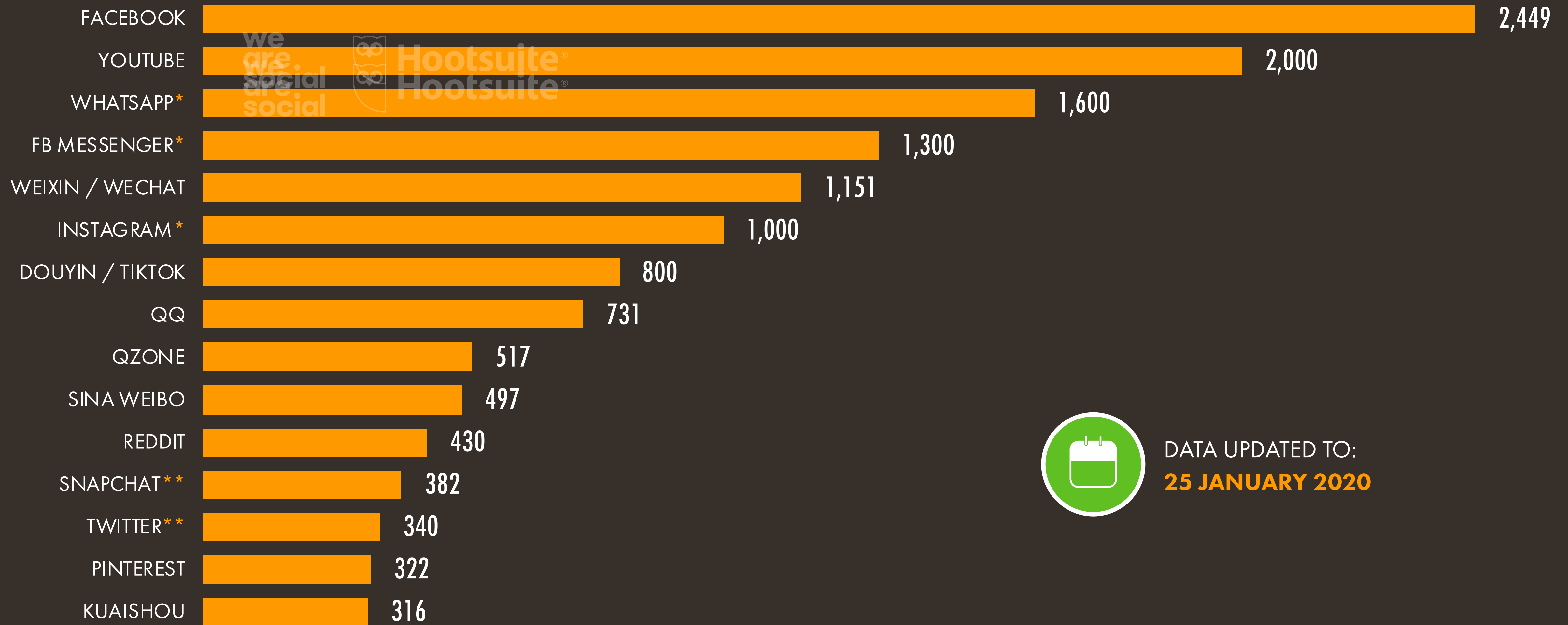
THE NUMBER OF ACTIVE SOCIAL MEDIA USERS IN EACH REGION COMPARED TO **TOTAL POPULATION***, REGARDLESS OF AGE



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THE WORLD'S MOST-USED SOCIAL PLATFORMS

BASED ON MONTHLY ACTIVE USERS, ACTIVE USER ACCOUNTS, ADVERTISING AUDIENCES, OR UNIQUE MONTHLY VISITORS (IN MILLIONS)

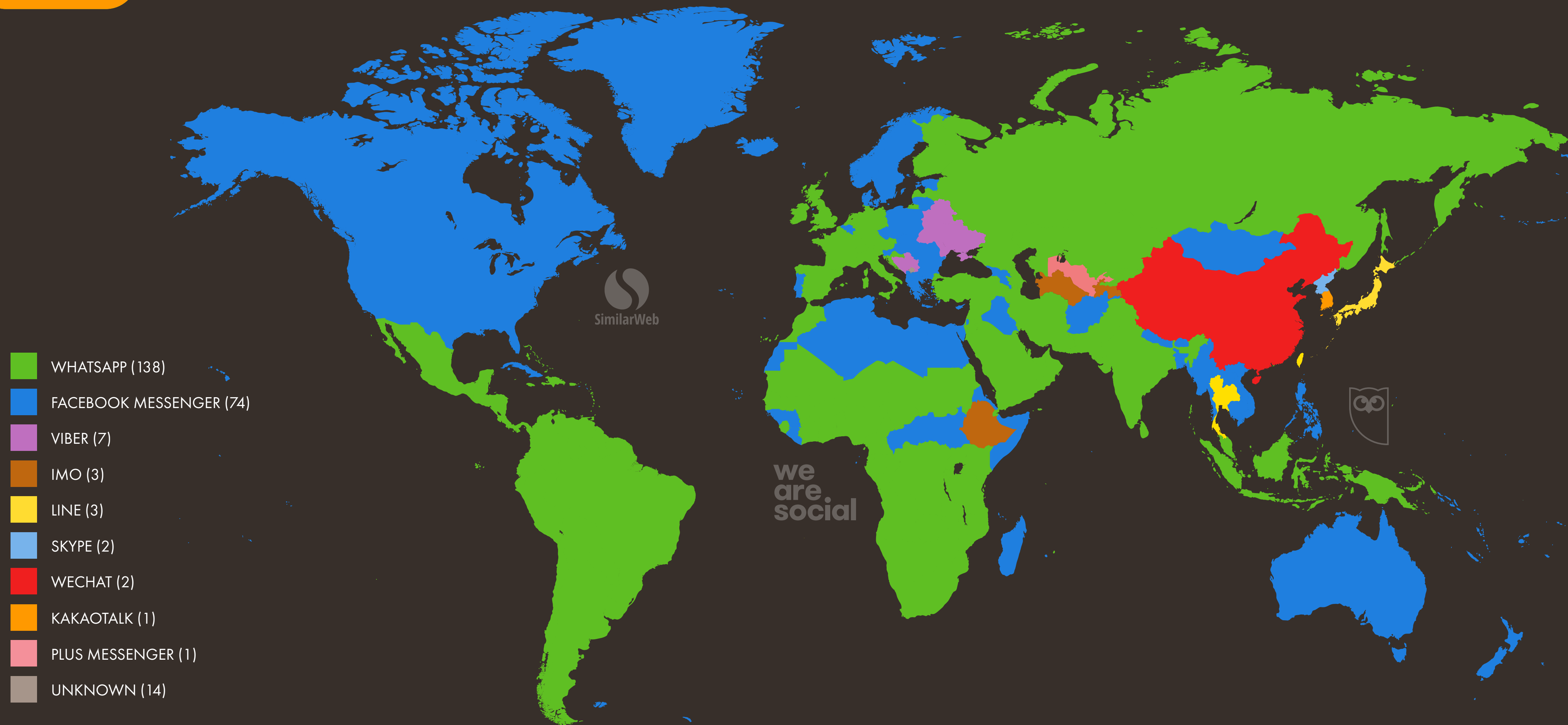


DATA UPDATED TO:
25 JANUARY 2020

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TOP MESSENGER APPS AROUND THE WORLD

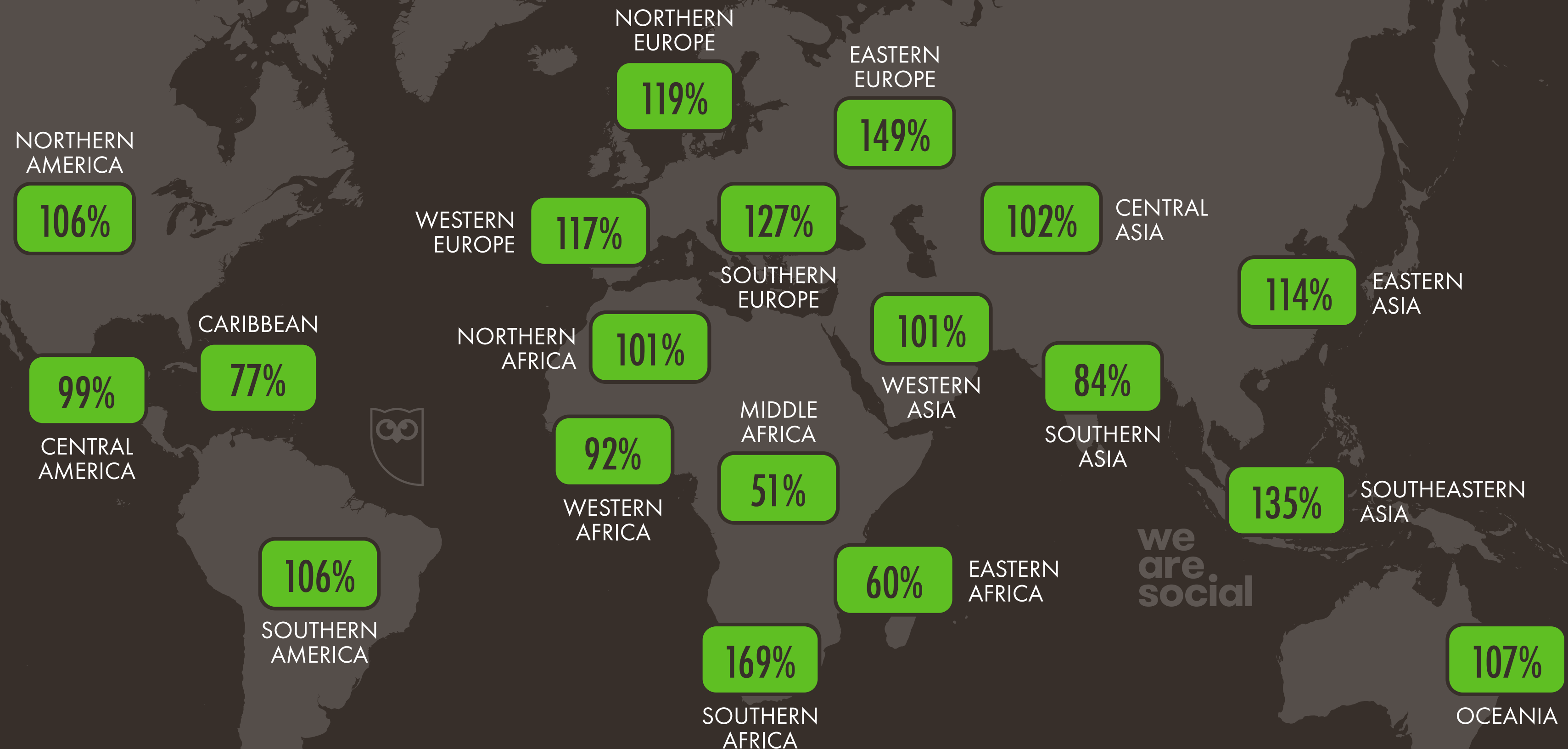
THE MOST ACTIVE MESSENGER APP* IN EACH COUNTRY OR TERRITORY IN DECEMBER 2019



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MOBILE CONNECTIVITY BY REGION

NUMBER OF MOBILE CONNECTIONS* IN EACH REGION COMPARED TO TOTAL POPULATION (REGARDLESS OF AGE)



SOURCE: GSMA INTELLIGENCE (JANUARY 2020, BASED ON DATA FOR Q4 2019). ***NOTES:** CONNECTION FIGURES DO NOT INCLUDE IOT CELLULAR CONNECTIONS. PERCENTAGES MAY EXCEED 100% DUE TO INDIVIDUAL USE OF MULTIPLE CONNECTIONS. REGIONS AS DEFINED BY THE UNITED NATIONS GEOScheme. **COMPARABILITY ADVISORY:** BASE CHANGES. SOME FIGURES MAY NOT BE DIRECTLY COMPARABLE TO DATA IN OUR PREVIOUS REPORTS.

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GLOBAL MOBILE APP RANKINGS: ACTIVE USERS

GLOBAL RANKINGS OF TOP MOBILE APPS AND GAMES BY AVERAGE **MONTHLY ACTIVE USERS** THROUGHOUT 2019

RANKING OF MOBILE **APPS** BY **MONTHLY ACTIVE USERS**

#	APP NAME	COMPANY
01	WHATSAPP MESSENGER	FACEBOOK
02	FACEBOOK	FACEBOOK
03	FACEBOOK MESSENGER	FACEBOOK
04	WECHAT	TENCENT
05	INSTAGRAM	FACEBOOK
06	TIKTOK	BYTEDANCE
07	ALIPAY	ANT FINANCIAL SERVICES GRP.
08	QQ	TENCENT
09	TAOBAO	ALIBABA GROUP
10	BAIDU	BAIDU

RANKING OF MOBILE **GAMES** BY **MONTHLY ACTIVE USERS**

#	GAME NAME	COMPANY
01	PUBG MOBILE	TENCENT
02	CANDY CRUSH SAGA	ACTIVISION BLIZZARD
03	HONOUR OF KINGS	TENCENT
04	ANIPOP	HAPPY ELEMENTS
05	GAME FOR PEACE	TENCENT
06	CLASH OF CLANS	SUPERCELL
07	POKÉMON GO	NIANTIC
08	SUBWAY SURFERS	KILOO
09	CLASH ROYALE	SUPERCELL
10	FREE FIRE	SEA

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GLOBAL ECOMMERCE ACTIVITIES

PERCENTAGE OF **INTERNET USERS AGED 16 TO 64** WHO REPORT PERFORMING EACH ACTIVITY IN THE PAST MONTH

SEARCHED ONLINE FOR
A PRODUCT OR SERVICE
TO BUY (ANY DEVICE)



global
web
index

80%

VISITED AN ONLINE
RETAIL STORE ON THE
WEB (ANY DEVICE)



90%

PURCHASED A
PRODUCT ONLINE
(ANY DEVICE)



global
web
index

74%

MADE AN ONLINE
PURCHASE VIA A LAPTOP
OR DESKTOP COMPUTER



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36%

MADE AN ONLINE
PURCHASE VIA A
MOBILE DEVICE



52%



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VIETNAM

THE ESSENTIAL HEADLINE DATA YOU NEED TO UNDERSTAND THE STATE OF MOBILE, INTERNET, AND SOCIAL MEDIA USE



VIETNAM

TOTAL
POPULATION



96.90
MILLION

URBANISATION:

36%

MOBILE PHONE
CONNECTIONS



145.8
MILLION

vs. POPULATION:

150%

INTERNET
USERS



68.17
MILLION

PENETRATION:

70%

ACTIVE SOCIAL
MEDIA USERS



65.00
MILLION

PENETRATION:

67%



we
are
social



SOURCES: POPULATION: UNITED NATIONS; MOBILE: GSMA INTELLIGENCE; INTERNET: ITU; GLOBALWEBINDEX; GSMA INTELLIGENCE; EUROSTAT; LOCAL TELECOMS REGULATORY AUTHORITIES AND GOVERNMENT BODIES; SOCIAL MEDIA PLATFORMS' SELF-SERVICE ADVERTISING TOOLS; APJII; KEPIOS ANALYSIS; SOCIAL MEDIA: PLATFORMS' SELF-SERVICE ADVERTISING TOOLS; COMPANY ANNOUNCEMENTS AND EARNINGS REPORTS; CAFEBAZAAR. ALL LATEST AVAILABLE DATA IN JANUARY 2020. **COMPARABILITY ADVISORY:** SOURCE AND BASE CHANGES.

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DIGITAL GROWTH INDICATORS

CHANGES IN KEY INDICATORS OF DIGITAL ADOPTION



VIETNAM

TOTAL
POPULATION



we
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social

+0.9%

JAN 2020 vs. JAN 2019

+896 THOUSAND

MOBILE PHONE
CONNECTIONS



+1.9%

JAN 2020 vs. JAN 2019

+2.7 MILLION

INTERNET
USERS



+10.0%

JAN 2020 vs. JAN 2019

+6.2 MILLION

ACTIVE SOCIAL
MEDIA USERS



+9.6%

JAN 2020 vs. APR 2019

+5.7 MILLION



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OVERVIEW OF THE POPULATION

CORE DEMOGRAPHIC INDICATORS



VIETNAM

TOTAL
POPULATION



96.90
MILLION

we
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social

FEMALES AS A PERCENTAGE
OF POPULATION*



50%



MALES AS A PERCENTAGE
OF POPULATION*



50%



ANNUAL CHANGE
IN TOTAL POPULATION



+0.9%
+896 THOUSAND



MEDIAN
AGE



32.5

URBAN POPULATION AS A
SHARE OF TOTAL POPULATION



36%



POPULATION DENSITY
(PEOPLE PER KM²)



313.9



OVERALL LITERACY RATE
(ADULTS AGED 15+)



95%



FEMALE LITERACY RATE
(ADULTS AGED 15+)



94%

we
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MALE LITERACY RATE
(ADULTS AGED 15+)



96%

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POPULATION BY AGE GROUP

THE TOTAL NUMBER OF PEOPLE WITHIN EACH AGE GROUP



VIETNAM

TOTAL
POPULATION



we
are
social

96.90
MILLION

POPULATION AGED
13 AND ABOVE



KEPIOS

80%
77.1 MILLION

POPULATION AGED
18 AND ABOVE



owl

73%
70.5 MILLION

POPULATION
AGED 16 TO 64



68%
65.6 MILLION

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DEVICE OWNERSHIP

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO OWN EACH KIND OF DEVICE



VIETNAM

MOBILE PHONE
(ANY TYPE)



94%



SMART
PHONE



93%



NON-SMARTPHONE
MOBILE PHONE



22%



LAPTOP OR DESKTOP
COMPUTER



65%



TABLET
DEVICE



32%

DEVICE FOR STREAMING TV
CONTENT OVER THE INTERNET



9.6%



GAMES
CONSOLE



6.9%



SMART HOME
DEVICE



13%



SMART WATCH
OR WRISTBAND



18%



VIRTUAL
REALITY DEVICE



3.1%



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DAILY TIME SPENT WITH MEDIA

AVERAGE DAILY TIME THAT INTERNET USERS AGED 16 TO 64 SPEND WITH DIFFERENT KINDS OF MEDIA AND DEVICES



VIETNAM

USING THE
INTERNET



we
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6H 30M

USING
SOCIAL MEDIA



global
web
index

2H 22M

WATCHING
TELEVISION*



2H 09M

LISTENING TO MUSIC
STREAMING SERVICES



global
web
index

1H 01M

USING A
GAMES CONSOLE



1H 00M





INTERNET USE

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OVERVIEW OF INTERNET USE

NUMBER OF PEOPLE USING THE INTERNET, AND HOW MUCH TIME THEY SPEND USING THE INTERNET EACH DAY



VIETNAM

TOTAL NUMBER
OF INTERNET USERS
ON ANY DEVICE



we
are
social

68.17
MILLION

INTERNET USERS
AS A PERCENTAGE OF
TOTAL POPULATION



70%

ANNUAL GROWTH
IN THE NUMBER
OF INTERNET USERS



global
web
index

+10.0%
+6.2 MILLION

AVERAGE DAILY TIME SPENT
USING THE INTERNET ON ANY
DEVICE BY EACH INTERNET USER



6H 30M



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MOBILE INTERNET USE

INTERNET USERS WHO ACCESS THE INTERNET VIA MOBILE PHONES



VIETNAM

TOTAL NUMBER
OF MOBILE
INTERNET USERS



65.99
MILLION

MOBILE INTERNET USERS
AS A PERCENTAGE OF
TOTAL INTERNET USERS



97%

SHARE OF ALL INTERNET
USERS ACCESSING
VIA SMARTPHONES*



96%

SHARE OF ALL INTERNET
USERS ACCESSING
VIA FEATURE PHONES*



3.2%

AVERAGE DAILY TIME SPENT
USING THE INTERNET
ON MOBILE DEVICES



3H 08M



SOURCES: ITU; GLOBALWEBINDEX; GSMA INTELLIGENCE; EUROSTAT; SOCIAL MEDIA PLATFORMS' SELF-SERVICE ADVERTISING TOOLS; LOCAL GOVERNMENT BODIES AND REGULATORY AUTHORITIES; APJII (ALL LATEST AVAILABLE DATA IN JANUARY 2020). TIME AND SHARE DATA VIA GLOBALWEBINDEX (Q3 2019) ***NOTE:** FIGURES FOR SHARE BY MOBILE DEVICE TYPE REPRESENT EACH DEVICE'S SHARE OF TOTAL INTERNET USERS AGED 16 TO 64, NOT JUST SHARE OF MOBILE INTERNET USERS. ♦ **COMPARABILITY ADVISORY:** SOURCE CHANGES.



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INTERNET CONNECTION SPEEDS: OVERVIEW

AVERAGE **DOWNLOAD** SPEEDS FOR MOBILE AND FIXED INTERNET CONNECTIONS, WITH YEAR-ON-YEAR COMPARISONS



VIETNAM

AVERAGE SPEED OF
MOBILE INTERNET
CONNECTIONS



we
are
social

30.39
MBPS

YEAR-ON-YEAR CHANGE IN
AVERAGE SPEED OF MOBILE
INTERNET CONNECTIONS



KEPIOS

+41%

AVERAGE SPEED OF
FIXED INTERNET
CONNECTIONS



we
are
social

43.26
MBPS

YEAR-ON-YEAR CHANGE IN
AVERAGE SPEED OF FIXED
INTERNET CONNECTIONS



+59%

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SHARE OF WEB TRAFFIC BY DEVICE

EACH DEVICE'S SHARE OF TOTAL **WEB PAGES** SERVED TO **WEB BROWSERS** IN DECEMBER 2019



VIETNAM

MOBILE
PHONES



16.2%

DEC 2019 vs. DEC 2018:

+1.2%

LAPTOPS &
DESKTOPS



82.6%

DEC 2019 vs. DEC 2018:

+0.5%

TABLET
COMPUTERS



1.1%

DEC 2019 vs. DEC 2018:

-36%

OTHER
DEVICES



[N/A]

DEC 2019 vs. DEC 2018:

[N/A]



we
are
social



we
are
social



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SOURCE: STATCOUNTER (ACCESSED JANUARY 2020). FIGURES REPRESENT EACH DEVICE'S SHARE OF WEB PAGES SERVED TO WEB BROWSERS ONLY. **NOTE:** FIGURES FOR DEVICE SHARE ARE FOR DECEMBER 2019; ANNUAL CHANGE FIGURES COMPARE MONTHLY SHARE VALUES FOR DECEMBER 2019 TO DECEMBER 2018.

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MOST-VISITED WEBSITES (ALEXA)

RANKING OF TOP WEBSITES BY AVERAGE MONTHLY TRAFFIC ACCORDING TO ALEXA



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#	WEBSITE		TIME / VISIT	PAGES / VISIT
01	GOOGLE.COM		12M 09S	14.6
02	YOUTUBE.COM		11M 44S	6.7
03	FACEBOOK.COM		17M 48S	7.8
04	GOOGLE.COM.VN		5M 08S	7.9
05	VNEXPRESS.NET		9M 18S	5.0
06	THETHAO247.VN		5M 10S	2.5
07	ZING.VN		7M 54S	4.7
08	SHOPEE.VN		12M 14S	8.3
09	24H.COM.VN		7M 45S	7.0
10	VTV.VN		2M 14S	2.0

#	WEBSITE		TIME / VISIT	PAGES / VISIT
11	KENH14.VN		8M 09S	4.7
12	DKN.TV		3M 11S	1.9
13	TIKI.VN		7M 40S	7.4
14	PHIMMOI.NET		4M 14S	5.2
15	DANTRI.COM.VN		6M 33S	3.7
16	WIKIPEDIA.ORG		3M 55S	3.0
17	LAZADA.VN		8M 43S	6.8
18	BONGACAMS.COM		3M 04S	1.7
19	ZALO.ME		4M 19S	1.9
20	FIVE88.COM		1M 34S	1.6

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TOP GOOGLE SEARCH QUERIES

THE MOST COMMON QUERIES THAT PEOPLE ENTERED INTO GOOGLE SEARCH THROUGHOUT 2019



VIETNAM

#	SEARCH QUERY	INDEX
01	PHIM	100
02	XSMB	65
03	XỔ SỐ	55
04	XSMN	43
05	GOOGLE	35
06	DỊCH	33
07	BONG DA	30
08	FACEBOOK	26
09	YOUTUBE	25
10	SO XO	25

#	SEARCH QUERY	INDEX
11	24H	22
12	XỔ SỐ MIỀN BẮC	19
13	XỔ SỐ MIỀN NAM	17
14	SXMB	17
15	XS	15
16	GOOGLE DỊCH	14
17	THỜI TIẾT	13
18	BÓNG ĐÁ	13
19	FB	13
20	TIN TUC	12

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ONLINE CONTENT ACTIVITIES

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO CONSUME EACH KIND OF CONTENT VIA THE INTERNET EACH MONTH



VIETNAM

WATCH
ONLINE VIDEOS



global
web
index

95%

WATCH
VLOGS



57%

LISTEN TO MUSIC
STREAMING SERVICES



global
web
index

73%

LISTEN TO ONLINE
RADIO STATIONS



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46%

LISTEN TO
PODCASTS



33%



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ONLINE PRIVACY AND WELL-BEING

EXTENT TO WHICH INTERNET USERS AGED 16 TO 64 WORRY ABOUT THEIR DIGITAL PRIVACY AND ONLINE WELL-BEING



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TRACKED SCREEN TIME OR
SET TIME LIMITS FOR SOME
APPS IN THE PAST MONTH



we
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34%

EXPRESSED CONCERN
ABOUT WHAT'S REAL OR
FAKE ON THE INTERNET*



[N/A]

EXPRESSED CONCERN
ABOUT HOW COMPANIES
USE THEIR PERSONAL DATA



global
web
index

60%

USED SOME FORM OF AD-
BLOCKING TOOL IN THE
PAST MONTH (ANY DEVICE)



KEPIOS

43%

DELETED COOKIES FROM
A WEB BROWSER IN THE
PAST MONTH (ANY DEVICE)



56%



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PLAYING GAMES: DEVICE PERSPECTIVE

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO PLAY VIDEO GAMES ON EACH KIND OF DEVICE



VIETNAM

ANY
DEVICE



we
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90%

SMART
PHONE



global
web
index

85%

PC (LAPTOP
OR DESKTOP)



owl

50%

GAMES
CONSOLE



global
web
index

9.1%

TABLET
COMPUTER



26%

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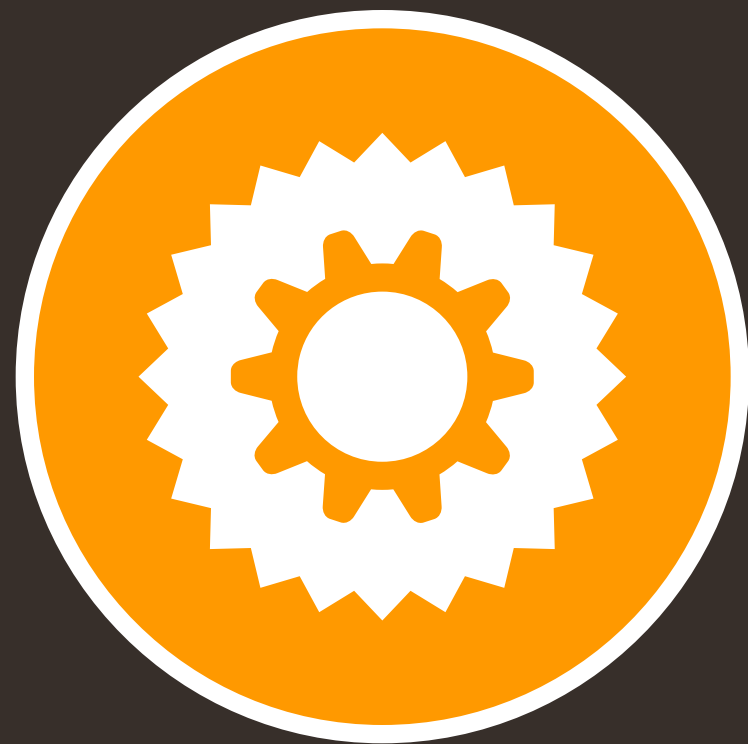
GAMING-RELATED ACTIVITIES

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO PARTICIPATED IN EACH GAMING-RELATED ACTIVITY IN THE PAST MONTH



VIETNAM

PURCHASED A
GAME ADD-ON
OR PAID FOR DLC*



6.1%

PLAYED A GAME ON
A CLOUD GAMING OR
STREAMING PLATFORM



13%

SHARED IMAGES
OR VIDEOS OF
OWN GAMEPLAY



12%

WATCHED A LIVE STREAM
OF OTHER PEOPLE
PLAYING GAMES



26%

WATCHED
AN ESPORTS
TOURNAMENT



18%



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ADOPTION OF DIGITAL INNOVATIONS

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO USE OR OWN EACH KIND OF DEVICE OR TECHNOLOGY



VIETNAM

USE VOICE SEARCH OR
VOICE COMMANDS EACH
MONTH (ANY DEVICE)



41%

we
are
social

WATCH TV CONTENT VIA A
STREAMING SUBSCRIPTION
SERVICE EACH MONTH



60%

global
web
index

OWN SOME
FORM OF SMART
HOME DEVICE



13%



OWN SOME
FORM OF
CRYPTOCURRENCY



7.5%



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2020

SMART HOME DEVICE MARKET OVERVIEW

SIZE AND VALUE OF THE MARKET FOR SMART HOME DEVICES IN 2019, WITH VALUE BY DEVICE SUB-CATEGORY (IN U.S. DOLLARS)



VIETNAM

NUMBER OF HOMES WITH
SMART HOME DEVICES



350.0
THOUSAND



TOTAL ANNUAL VALUE OF
SMART HOME DEVICES MARKET



\$105.0
MILLION

statista

VALUE OF SMART HOME CONTROL
& CONNECTIVITY DEVICE MARKET*



\$17.00
MILLION



VALUE OF SMART HOME
APPLIANCES MARKET



\$36.00
MILLION

VALUE OF SMART HOME
SECURITY DEVICE MARKET



\$24.00
MILLION

statista

VALUE OF SMART HOME
ENTERTAINMENT DEVICE MARKET



\$18.00
MILLION

we
are
social

VALUE OF SMART HOME
COMFORT & LIGHTING MARKET



\$8.00
MILLION

KEPIOS

VALUE OF SMART HOME
ENERGY MANAGEMENT MARKET



\$2.00
MILLION

SOURCE: STATISTA MARKET OUTLOOK FOR THE SMART HOME CATEGORY (ACCESSED JANUARY 2020). FIGURES REPRESENT ESTIMATES OF FULL-YEAR REVENUES FOR 2019, IN U.S. DOLLARS. SEE [STATISTA.COM/OUTLOOK/DIGITAL-MARKETS](https://www.statista.com/outlook/digital-markets) FOR MORE DETAILS. ***NOTES:** THE "CONTROL AND CONNECTIVITY" SEGMENT INCLUDES HUBS AND INTERFACES FOR "INTELLIGENT HOME NETWORKS" (E.G. SMART SPEAKERS, CENTRAL CONTROL UNITS, SMART PLUGS, ETC.).

we
are
social



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2020

SMART HOME DEVICE MARKET GROWTH

YEAR-ON-YEAR CHANGE IN THE SIZE AND VALUE OF THE SMART HOME MARKET (2019 vs. 2018), WITH DETAIL BY SUB-CATEGORY



VIETNAM

ANNUAL CHANGE IN
SMART HOME PENETRATION*



+64%



Y-O-Y VALUE CHANGE: OVERALL
SMART HOME DEVICES MARKET



+63%

statista

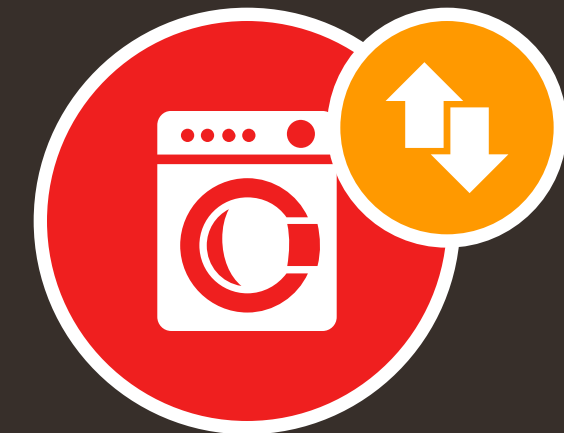
Y-O-Y VALUE CHANGE: SMART HOME
CONTROL & CONNECTIVITY MARKET



+85%



Y-O-Y VALUE CHANGE: SMART
HOME APPLIANCES MARKET



+64%

Y-O-Y VALUE CHANGE: SMART
HOME SECURITY DEVICE MARKET



+56%

statista

Y-O-Y VALUE CHANGE: SMART HOME
ENTERTAINMENT DEVICE MARKET



+54%

we
are
social

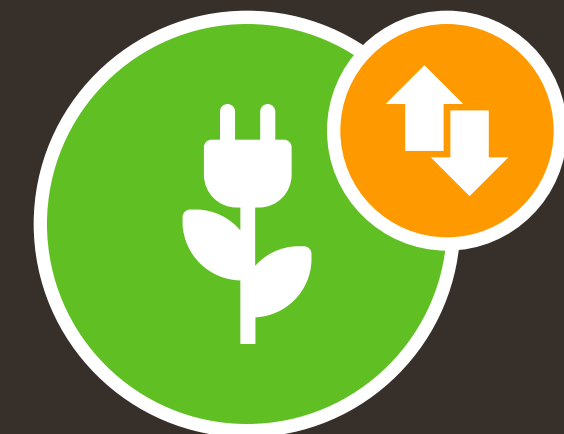
Y-O-Y VALUE CHANGE: SMART HOME
COMFORT & LIGHTING MARKET



+61%

KEPIOS

Y-O-Y VALUE CHANGE: SMART HOME
ENERGY MANAGEMENT MARKET



+73%



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2020

AVERAGE ANNUAL REVENUE PER SMART HOME

AVERAGE ANNUAL SPEND ON SMART HOME DEVICES PER SMART HOME IN 2019 (IN U.S. DOLLARS)



VIETNAM

PENETRATION OF
SMART HOME DEVICES*



1.8%



ARPU*: COMBINED SPEND ON
ALL SMART HOME DEVICES



\$300

statista

ARPU*: SMART HOME CONTROL
& CONNECTIVITY DEVICES



\$56



ARPU*: SMART
HOME APPLIANCES



\$231

ARPU*: SMART HOME
SECURITY DEVICES



\$148

statista

ARPU*: SMART HOME
ENTERTAINMENT DEVICES



\$76

we
are
social

ARPU*: SMART HOME
COMFORT & LIGHTING



\$36

KEPIOS

ARPU*: SMART HOME
ENERGY MANAGEMENT



\$20

SOURCE: STATISTA MARKET OUTLOOK FOR THE SMART HOME CATEGORY (ACCESSED JANUARY 2020). FIGURES REPRESENT ESTIMATES OF FULL-YEAR REVENUE FOR 2019, IN U.S. DOLLARS. SEE [STATISTA.COM/OUTLOOK/DIGITAL-MARKETS](https://www.statista.com/outlook/digital-markets) FOR MORE DETAILS. ***NOTES:** IN THIS CONTEXT, "PENETRATION" REFERS TO THE NUMBER OF HOMES WITH SMART HOME DEVICES, AND "ARPU" REFERS TO AVERAGE REVENUE PER HOME WITH A SMART DEVICE.





SOCIAL MEDIA USE

JAN
2020

SOCIAL MEDIA OVERVIEW

BASED ON THE REPORTED POTENTIAL ADVERTISING REACH OF SELECTED SOCIAL MEDIA PLATFORMS



VIETNAM

TOTAL NUMBER
OF ACTIVE SOCIAL
MEDIA USERS



we
are
social

65.00
MILLION

SOCIAL MEDIA USERS
COMPARED TO
TOTAL POPULATION



global
web
index

67%

CHANGE IN SOCIAL
MEDIA USER NUMBERS
(APR 2019 TO JAN 2020)



owl

+9.6%
+5.7 MILLION

PERCENTAGE OF ACTIVE
SOCIAL MEDIA USERS
ACCESSING VIA MOBILE



99%



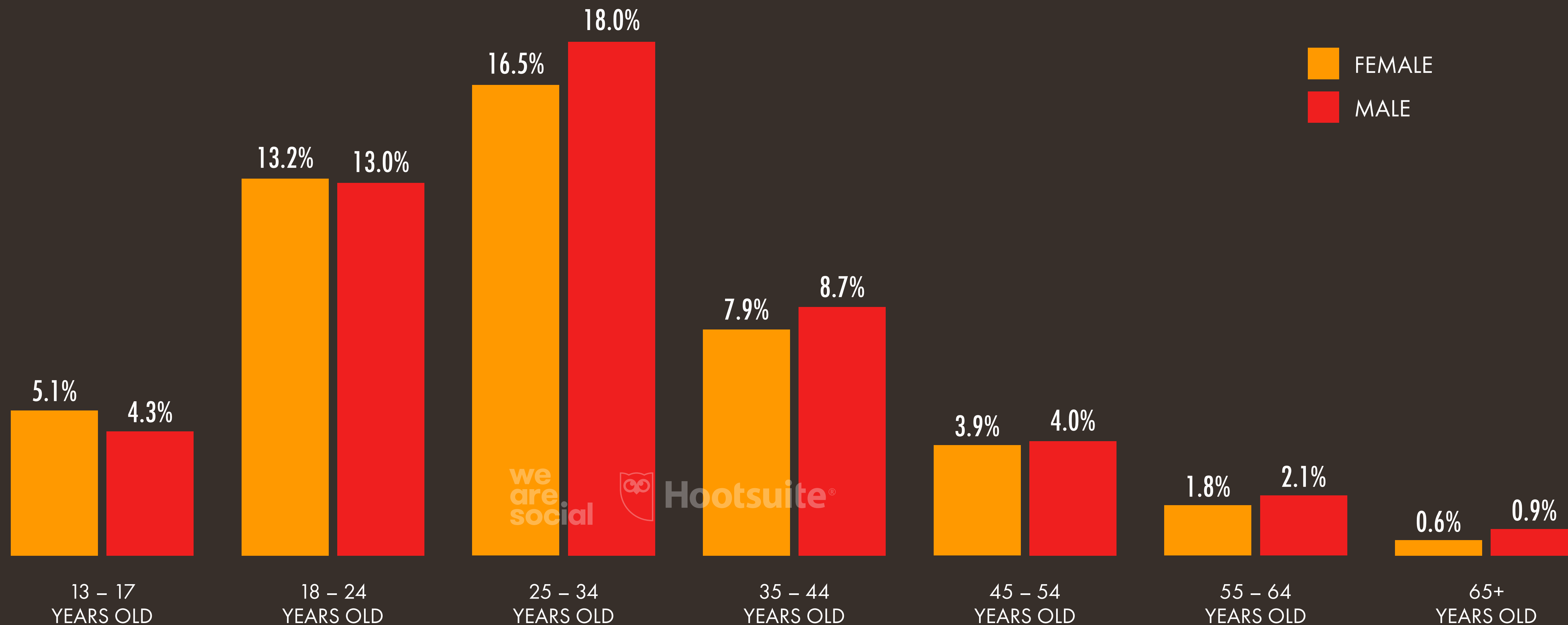
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2020

SOCIAL MEDIA ADVERTISING AUDIENCE PROFILE

SHARE OF THE TOTAL ADVERTISING AUDIENCE* ACROSS FACEBOOK, INSTAGRAM, AND FB MESSENGER, BY AGE AND GENDER



VIETNAM



JAN
2020

SOCIAL MEDIA BEHAVIOURS

DETAILS OF HOW INTERNET USERS AGED 16 TO 64 ENGAGE WITH SOCIAL MEDIA



VIETNAM

VISITED OR USED A SOCIAL
NETWORK OR MESSAGING
SERVICE IN THE PAST MONTH*



96%

ACTIVELY ENGAGED WITH
OR CONTRIBUTED TO SOCIAL
MEDIA IN THE PAST MONTH



89%

AVERAGE AMOUNT
OF TIME PER DAY SPENT
USING SOCIAL MEDIA



2H 22M

AVERAGE NUMBER OF
SOCIAL MEDIA ACCOUNTS
PER INTERNET USER*



8.9

PERCENTAGE OF INTERNET
USERS WHO USE SOCIAL
MEDIA FOR WORK PURPOSES



58%



SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE [GLOBALWEBINDEX.COM](https://www.globalwebindex.com) FOR MORE DETAILS.

***NOTE:** FIGURE FOR SOCIAL MEDIA ACCOUNTS MAY NOT INDICATE ACTIVE USE OF ALL ACCOUNTS EVERY MONTH. ***ADVISORY:** FIGURE FOR PERCENTAGE OF INTERNET USERS WHO VISITED OR USED A SOCIAL PLATFORM IN THE PAST MONTH MAY NOT CORRELATE TO TOTAL NUMBER OF SOCIAL MEDIA USERS DUE TO DIFFERENT REPORTING BASES AND METHODOLOGIES.



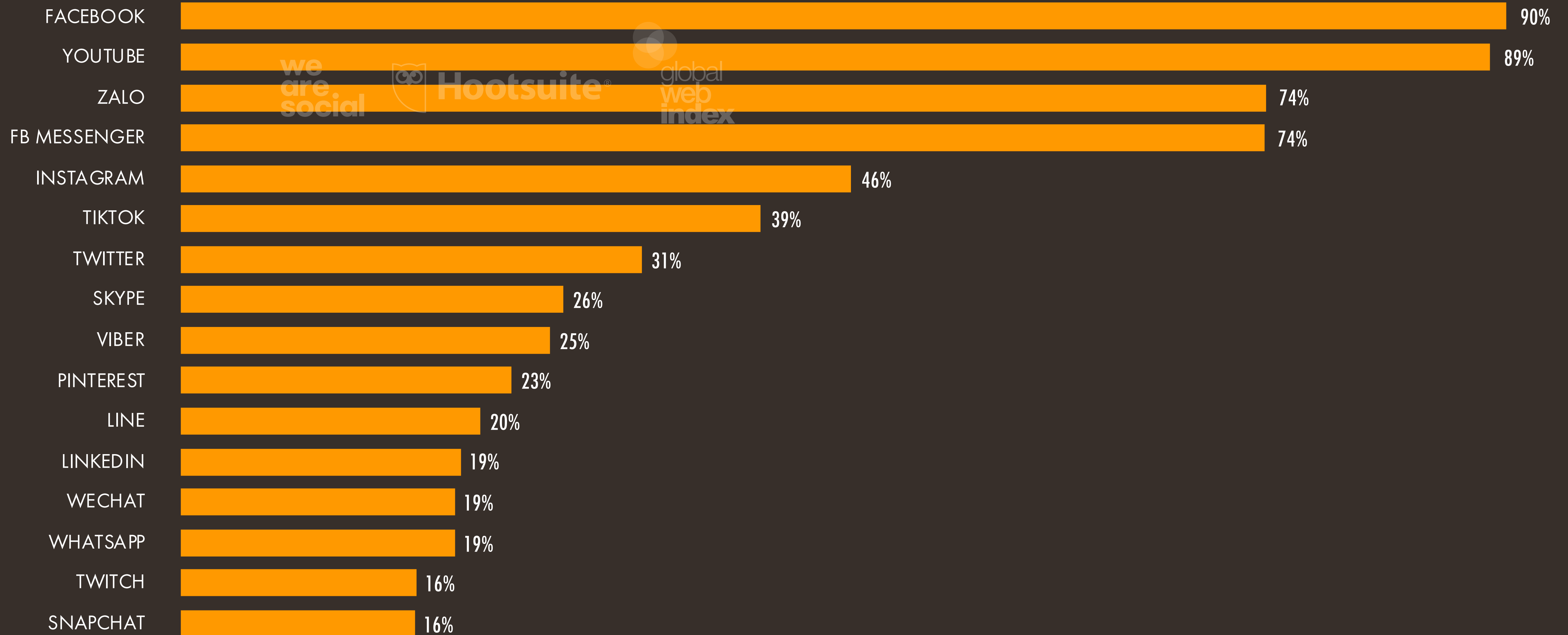
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MOST-USED SOCIAL MEDIA PLATFORMS

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO REPORT USING EACH PLATFORM IN THE PAST MONTH



VIETNAM



SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE [GLOBALWEBINDEX.COM](https://globalwebindex.com) FOR MORE DETAILS.
NOTE: FIGURES ARE BASED ON INTERNET USERS' SELF-REPORTED BEHAVIOUR, AND MAY NOT MATCH THE MONTHLY ACTIVE USER FIGURES OR ADDRESSABLE ADVERTISING AUDIENCE REACH FIGURES FOR EACH PLATFORM THAT WE PUBLISH ELSEWHERE IN THIS REPORT.

JAN
2020

FACEBOOK AUDIENCE OVERVIEW

THE POTENTIAL NUMBER OF PEOPLE THAT MARKETERS CAN REACH USING ADVERTS ON FACEBOOK



VIETNAM

NUMBER OF PEOPLE THAT
FACEBOOK REPORTS
CAN BE REACHED WITH
ADVERTS ON FACEBOOK



we
are
social

61.00
MILLION

FACEBOOK'S REPORTED
ADVERTISING REACH
COMPARED TO TOTAL
POPULATION AGED 13+



79%

QUARTER-ON-
QUARTER CHANGE
IN FACEBOOK'S
ADVERTISING REACH



+1.7%
+1.0 MILLION

PERCENTAGE OF
ITS AD AUDIENCE
THAT FACEBOOK
REPORTS IS FEMALE*



KEPIOS

49.2%

PERCENTAGE OF
ITS AD AUDIENCE
THAT FACEBOOK
REPORTS IS MALE*



50.8%



JAN
2020

FACEBOOK ACCESS BY DEVICE

THE DEVICES THAT FACEBOOK USERS USE TO ACCESS THE PLATFORM



VIETNAM

PERCENTAGE OF FACEBOOK
USERS ACCESSING VIA ANY
KIND OF MOBILE PHONE



98.7%

PERCENTAGE OF FACEBOOK
USERS WHO ONLY ACCESS VIA A
LAPTOP OR DESKTOP COMPUTER



1.3%

PERCENTAGE OF FACEBOOK
USERS WHO ACCESS VIA BOTH
PHONES AND COMPUTERS



19.8%

PERCENTAGE OF FACEBOOK
USERS WHO ONLY ACCESS
VIA A MOBILE PHONE



78.8%

JAN
2020

FACEBOOK ACTIVITY FREQUENCY

HOW OFTEN A 'TYPICAL' USER* PERFORMS EACH ACTIVITY ON FACEBOOK



VIETNAM

NUMBER OF
FACEBOOK PAGES
LIKED (LIFETIME*)



1



FEMALE: MALE:

1

1

POSTS LIKED IN
THE PAST 30 DAYS
(ALL POST TYPES)



9



FEMALE: MALE:

11

7

COMMENTS MADE IN
THE PAST 30 DAYS
(ALL POST TYPES)



8



FEMALE: MALE:

10

6

FACEBOOK POSTS
SHARED IN THE PAST 30
DAYS (ALL POST TYPES)



2



FEMALE: MALE:

2

1

FACEBOOK ADVERTS
CLICKED IN THE PAST 30
DAYS (ANY CLICK TYPE)



17

FEMALE: MALE:

20

15



JAN
2020

FACEBOOK PAGE REACH BENCHMARKS

AVERAGE* MONTHLY GROWTH IN PAGE LIKES ('FANS'), AVERAGE REACH OF PAGE POSTS, AND THE ROLE OF PAID MEDIA



VIETNAM

AVERAGE MONTHLY
CHANGE IN PAGE LIKES



locowise

+0.16%

AVERAGE POST REACH
vs. PAGE LIKES



we
are
social

7.6%

AVERAGE ORGANIC
REACH vs. PAGE LIKES



locowise

5.7%

PERCENTAGE OF PAGES
USING PAID MEDIA



owl

25.2%

AVERAGE PAID REACH
vs. TOTAL REACH



32.2%

JAN
2020

FACEBOOK ENGAGEMENT BENCHMARKS

AVERAGE* NUMBER OF PEOPLE WHO ENGAGE WITH A FACEBOOK PAGE POST COMPARED TO POST REACH



VIETNAM

AVERAGE ENGAGEMENT
RATE FOR FACEBOOK
PAGE POSTS OF ANY KIND



4.00%

AVERAGE ENGAGEMENT
RATE FOR FACEBOOK
PAGE VIDEO POSTS



9.86%

AVERAGE ENGAGEMENT
RATE FOR FACEBOOK
PAGE IMAGE POSTS



4.29%

AVERAGE ENGAGEMENT
RATE FOR FACEBOOK
PAGE LINK POSTS



4.28%

AVERAGE ENGAGEMENT
RATE FOR FACEBOOK
PAGE STATUS POSTS



1.17%

JAN
2020

INSTAGRAM AUDIENCE OVERVIEW

THE POTENTIAL NUMBER OF PEOPLE THAT MARKETERS CAN REACH USING ADVERTS ON INSTAGRAM



VIETNAM

NUMBER OF PEOPLE THAT
INSTAGRAM REPORTS
CAN BE REACHED WITH
ADVERTS ON INSTAGRAM



5.40
MILLION

INSTAGRAM'S REPORTED
ADVERTISING REACH
COMPARED TO TOTAL
POPULATION AGED 13+



7.0%

QUARTER-ON-
QUARTER CHANGE
IN INSTAGRAM'S
ADVERTISING REACH



+10%

PERCENTAGE OF
ITS AD AUDIENCE
THAT INSTAGRAM
REPORTS IS FEMALE*



61.1%

PERCENTAGE OF
ITS AD AUDIENCE
THAT INSTAGRAM
REPORTS IS MALE*



38.9%



JAN
2020

TWITTER AUDIENCE OVERVIEW

THE POTENTIAL NUMBER OF PEOPLE THAT MARKETERS CAN REACH USING ADVERTS ON TWITTER



VIETNAM

NUMBER OF PEOPLE THAT
TWITTER REPORTS
CAN BE REACHED WITH
ADVERTS ON TWITTER



KEPIOS

1.27
MILLION

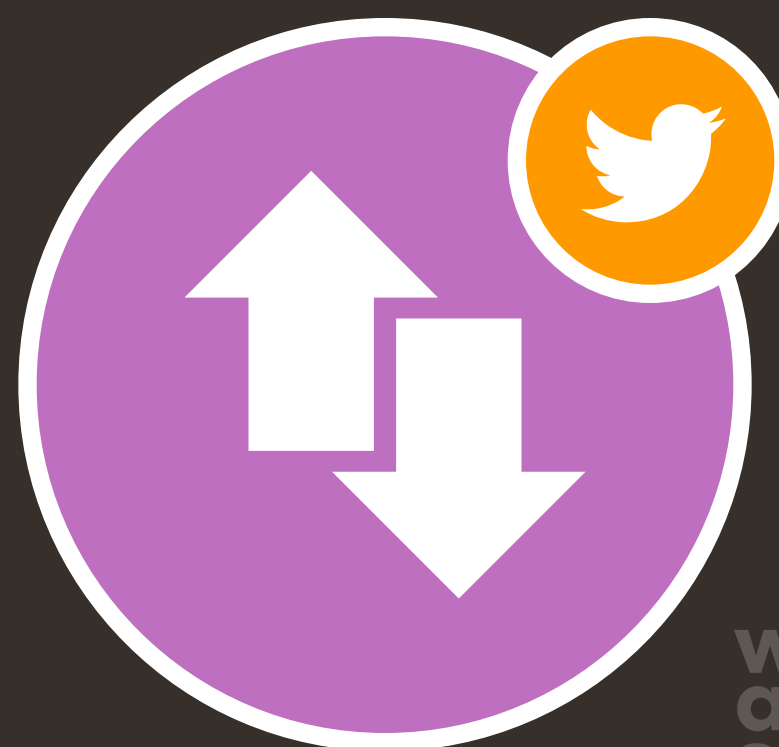
TWITTER'S REPORTED
ADVERTISING REACH
COMPARED TO TOTAL
POPULATION AGED 13+



we
are
social

1.6%

QUARTER-ON-
QUARTER CHANGE
IN TWITTER'S
ADVERTISING REACH



we
are
social

+8.1%

PERCENTAGE OF
ITS AD AUDIENCE
THAT TWITTER
REPORTS IS FEMALE*



we
are
social

46.3%

PERCENTAGE OF
ITS AD AUDIENCE
THAT TWITTER
REPORTS IS MALE*



53.7%

JAN
2020

LINKEDIN AUDIENCE OVERVIEW

THE POTENTIAL NUMBER OF PEOPLE THAT MARKETERS CAN REACH USING ADVERTS ON LINKEDIN



VIETNAM

NUMBER OF PEOPLE THAT
LINKEDIN REPORTS
CAN BE REACHED WITH
ADVERTS ON LINKEDIN*



3.30
MILLION

LINKEDIN'S REPORTED
ADVERTISING REACH
COMPARED TO TOTAL
POPULATION AGED 18+



4.7%

QUARTER-ON-
QUARTER CHANGE
IN LINKEDIN'S
ADVERTISING REACH



+3.1%

PERCENTAGE OF
ITS AD AUDIENCE
THAT LINKEDIN
REPORTS IS FEMALE*



55.9%

PERCENTAGE OF
ITS AD AUDIENCE
THAT LINKEDIN
REPORTS IS MALE*



44.1%



JAN
2020

TOP YOUTUBE SEARCH QUERIES

THE MOST COMMON QUERIES THAT PEOPLE ENTERED INTO YOUTUBE'S SEARCH TOOLS THROUGHOUT 2019



VIETNAM

#	SEARCH QUERY	INDEX
01	PHIM	100
02	KARAOKE	84
03	NHAC	68
04	NHẠC	66
05	HAI	21
06	MA	21
07	VỀ NHÀ ĐI CON	15
08	DORAEMON	14
09	TIK TOK	13
10	HÀI	12

#	SEARCH QUERY	INDEX
11	PHIM HAY	11
12	SIÊU NHÂN	10
13	NHẠC REMIX	10
14	BTS	9
15	THIEU NHI	9
16	BOLERO	9
17	NHAC TRE	9
18	NHAC THIEU NHI	7
19	HOẠT HÌNH	7
20	CA NHẠC	7



MOBILE USE

JAN
2020

MOBILE CONNECTIONS BY TYPE

OVERVIEW OF MOBILE CONNECTIONS WITH SHARE BY PAYMENT TYPE AND CONNECTION BANDWIDTH



VIETNAM

NUMBER OF MOBILE
CONNECTIONS
(EXCLUDING IOT)



GSMA

145.8
MILLION

MOBILE CONNECTIONS
AS A PERCENTAGE OF
TOTAL POPULATION



GSMA

150%

PERCENTAGE OF
MOBILE CONNECTIONS
THAT ARE PRE-PAID



GSMA

89%

PERCENTAGE OF
MOBILE CONNECTIONS
THAT ARE POST-PAID



we
are
social

11%

PERCENTAGE OF MOBILE
CONNECTIONS THAT ARE
BROADBAND (3G – 5G)



53%

JAN
2020

MOBILE CONNECTIVITY INDEX

GSMA INTELLIGENCE'S ASSESSMENT OF KEY ENABLERS AND DRIVERS OF MOBILE INTERNET CONNECTIVITY



VIETNAM

OVERALL COUNTRY
INDEX SCORE



64.98

OUT OF MAX. 100

MOBILE NETWORK
INFRASTRUCTURE



59.84

OUT OF MAX. 100

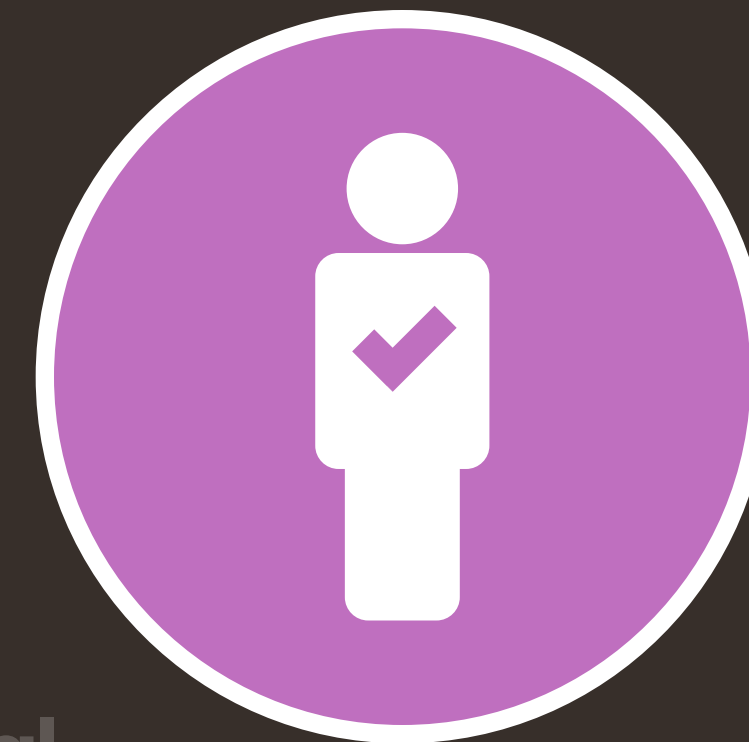
AFFORDABILITY OF
DEVICES & SERVICES



64.05

OUT OF MAX. 100

CONSUMER
READINESS



73.24

OUT OF MAX. 100

AVAILABILITY OF RELEVANT
CONTENT & SERVICES



63.51

OUT OF MAX. 100

JAN
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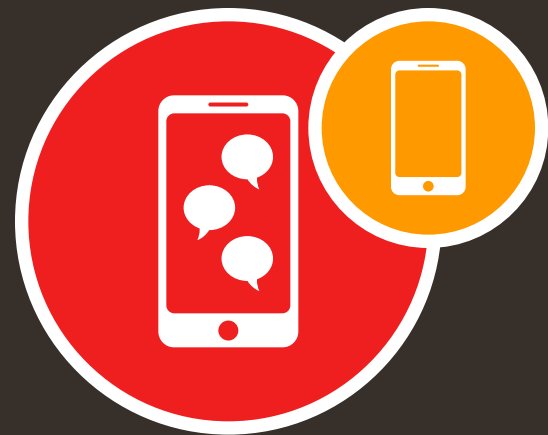
USE OF MOBILE APPS BY CATEGORY

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO REPORT USING EACH TYPE OF MOBILE APP EACH MONTH



VIETNAM

CHAT APPS
(MESSENGERS)



93%

global
web
index

SOCIAL
NETWORKING APPS



94%

we
are
social

ENTERTAINMENT
OR VIDEO APPS



85%

global
web
index

GAMES
(ANY TYPE)



58%

KEPIOS

SHOPPING
APPS



55%

MUSIC
APPS



60%



MAP
APPS



74%

global
web
index

BANKING
APPS



36%



DATING AND
FRIENDSHIP APPS



9.0%

global
web
index

HEALTH AND
FITNESS APPS



20%

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2020

MOBILE APP RANKINGS: ACTIVE USERS

RANKING OF TOP MOBILE APPS AND GAMES BY AVERAGE MONTHLY ACTIVE USERS THROUGHOUT 2019



VIETNAM

RANKING OF MOBILE APPS BY ACTIVE USERS

#	APP NAME	COMPANY
01	FACEBOOK	FACEBOOK
02	FACEBOOK MESSENGER	FACEBOOK
03	ZALO	VNG
04	ZING MP3	VNG
05	GRAB	GRAB
06	VIBER	RAKUTEN
07	VTC NOW	VTC
08	SHOPEE	SEA
09	INSTAGRAM	FACEBOOK
10	LAZADA	ALIBABA GROUP

RANKING OF MOBILE GAMES BY ACTIVE USERS

#	GAME NAME	COMPANY
01	ARENA OF VALOR	SEA
02	FREE FIRE	SEA
03	PUBG MOBILE	TENCENT
04	MINECRAFT POCKET EDITION	MICROSOFT
05	MINI WORLD BLOCK ART	MINIWAN
06	MOBILE LEGENDS: BANG BANG	MOONTON
07	DREAM LEAGUE SOCCER 2016	FIRST TOUCH
08	CANDY CRUSH SAGA	ACTIVISION BLIZZARD
09	CLASH OF CLANS	SUPERCELL
10	MY TALKING TOM	OUTFIT7

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MOBILE APP RANKINGS: DOWNLOADS

RANKING OF TOP MOBILE APPS AND GAMES BY NUMBER OF DOWNLOADS THROUGHOUT 2019



VIETNAM

RANKING OF MOBILE APPS BY NUMBER OF DOWNLOADS

#	APP NAME	COMPANY
01	FACEBOOK MESSENGER	FACEBOOK
02	FACEBOOK	FACEBOOK
03	TIKTOK	BYTEDANCE
04	ZALO	VNG
05	ZING MP3	VNG
06	SHOPEE	SEA
07	ULIKE	BYTEDANCE
08	HAGO	YY INC
09	B612	NAVER
10	TIKI.VN	TIKI

RANKING OF MOBILE GAMES BY NUMBER OF DOWNLOADS

#	GAME NAME	COMPANY
01	FREE FIRE	SEA
02	ARENA OF VALOR	SEA
03	PUBG MOBILE	TENCENT
04	TILES HOP: EDM RUSH	AMANOTES
05	MOBILE LEGENDS: BANG BANG	MOONTON
06	QQ SPEED	TENCENT
07	ZOMBIE TSUNAMI	MOBIGAME
08	SUBWAY SURFERS	KILOO
09	MY TALKING TOM 2	OUTFIT7
10	DOT N BEAT	BADSNOWBALL

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MOBILE APP RANKINGS: CONSUMER SPEND

RANKING OF TOP MOBILE APPS AND GAMES BY TOTAL CONSUMER SPEND THROUGHOUT 2019



VIETNAM

RANKING OF MOBILE APPS BY CONSUMER SPEND

#	APP NAME	COMPANY
01	BIGO LIVE	YY INC
02	HAGO	YY INC
03	GOOGLE ONE	GOOGLE
04	TINDER	INTERACTIVECORP (IAC)
05	ZALO	VNG
06	VIVAVIDEO	QUVIDEO
07	ZING MP3	VNG
08	KARAOKE NOW	CHANGYOU.COM
09	PICSART PHOTO STUDIO	PICSART
10	GOOGLE DRIVE	GOOGLE

we
are
social

RANKING OF MOBILE GAMES BY CONSUMER SPEND

#	GAME NAME	COMPANY
01	LORDS MOBILE	IGG
02	FREE FIRE	SEA
03	ARENA OF VALOR	SEA
04	RISE OF KINGDOMS	LILITH
05	PUBG MOBILE	TENCENT
06	BE THE KING	CHUANG COOL
07	RISE OF THE KINGS	ONEMT
08	AFK ARENA	LILITH
09	CASTLE CLASH	IGG
10	IDLE HEROES	DH GAMES



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SHARE OF WEB TRAFFIC BY MOBILE OS

SHARE OF **WEB PAGE REQUESTS** ORIGINATING FROM MOBILE HANDSETS RUNNING DIFFERENT MOBILE OPERATING SYSTEMS



VIETNAM

SHARE OF WEB TRAFFIC
ORIGINATING FROM
ANDROID DEVICES



we
are
social

61.2%

DEC 2019 vs. DEC 2018:

+3.3%

SHARE OF WEB TRAFFIC
ORIGINATING FROM
APPLE IOS DEVICES



KEPIOS

37.1%

DEC 2019 vs. DEC 2018:

-3.8%

SHARE OF WEB TRAFFIC
ORIGINATING FROM
KAI OS DEVICES



owl

[N/A]

DEC 2019 vs. DEC 2018:

[N/A]

SHARE OF WEB TRAFFIC
ORIGINATING FROM
SAMSUNG OS DEVICES*



lightbulb

0.3%

DEC 2019 vs. DEC 2018:

+25%

SHARE OF WEB TRAFFIC
ORIGINATING FROM
OTHER OS DEVICES



1.5%

DEC 2019 vs. DEC 2018:

-26%

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MOBILE ACTIONS

PERCENT OF INTERNET USERS AGED 16 TO 64 WHO PERFORM EACH ACTION USING THEIR MOBILE PHONE EACH MONTH



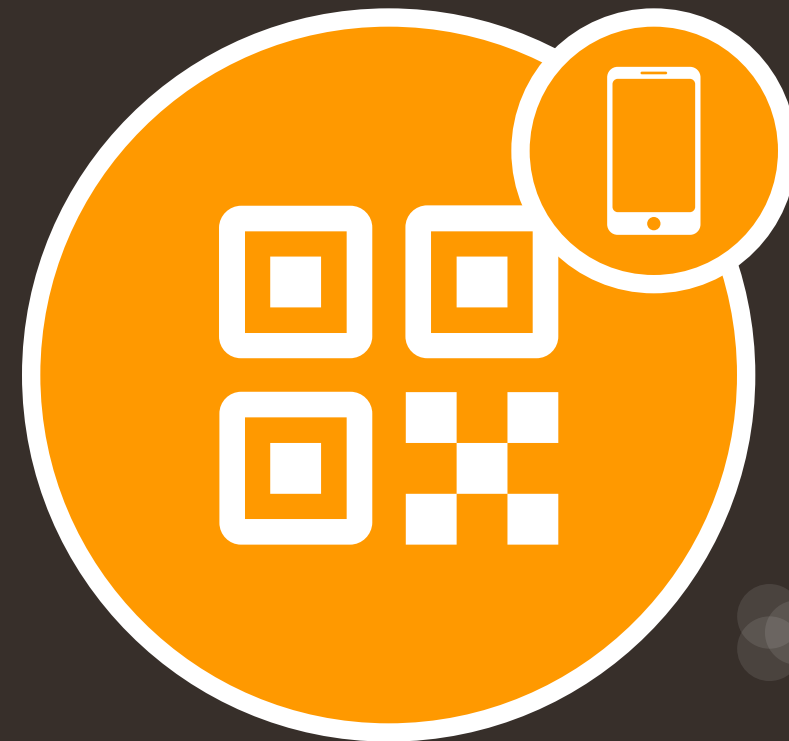
VIETNAM

WATCH CONTENT
ON A TV BY CASTING IT
FROM A MOBILE PHONE*



37%

USE OR
SCAN
QR CODES



37%

USE AN
IMAGE SEARCH
TOOL OR SERVICE



57%

USE A MOBILE
PHONE AS A TICKET
OR BOARDING PASS



15%

TRANSFER MONEY
TO FRIENDS
OR FAMILY



46%





ECOMMERCE USE

JAN
2020

FINANCIAL INCLUSION FACTORS

PERCENTAGE OF THE POPULATION AGED 15+ THAT REPORTS OWNING OR USING EACH FINANCIAL PRODUCT OR SERVICE



VIETNAM

HAS AN ACCOUNT WITH
A FINANCIAL INSTITUTION



30%



HAS A
CREDIT CARD



4.1%



HAS A MOBILE
MONEY ACCOUNT



3.5%



MAKES ONLINE PURCHASES
AND / OR PAYS BILLS ONLINE



21%

PERCENTAGE OF WOMEN
WITH A CREDIT CARD



3.7%



PERCENTAGE OF MEN
WITH A CREDIT CARD



4.6%



PERCENTAGE OF WOMEN
MAKING ONLINE TRANSACTIONS



21%



PERCENTAGE OF MEN
MAKING ONLINE TRANSACTIONS



20%



JAN
2020

ECOMMERCE ACTIVITIES

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO REPORT PERFORMING EACH ACTIVITY IN THE PAST MONTH



VIETNAM

SEARCHED ONLINE FOR
A PRODUCT OR SERVICE
TO BUY (ANY DEVICE)



global
web
index

84%

VISITED AN ONLINE
RETAIL STORE ON THE
WEB (ANY DEVICE)



75%

PURCHASED A
PRODUCT ONLINE
(ANY DEVICE)



global
web
index

75%

MADE AN ONLINE
PURCHASE VIA A LAPTOP
OR DESKTOP COMPUTER



we
are
social

35%

MADE AN ONLINE
PURCHASE VIA A
MOBILE DEVICE



59%



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2020

ECOMMERCE SPEND BY CATEGORY

TOTAL AMOUNT SPENT IN CONSUMER ECOMMERCE CATEGORIES IN 2019, IN U.S. DOLLARS



VIETNAM

FASHION
& BEAUTY



\$717.0
MILLION

statista

ELECTRONICS &
PHYSICAL MEDIA



\$716.0
MILLION



FOOD &
PERSONAL CARE



\$517.0
MILLION

we
are
social

FURNITURE &
APPLIANCES



\$526.0
MILLION

TOYS, DIY
& HOBBIES



\$487.0
MILLION



TRAVEL (INCLUDING
ACCOMMODATION)*



\$4.72
BILLION

we
are
social

DIGITAL
MUSIC



\$23.00
MILLION

statista

VIDEO
GAMES



\$117.0
MILLION

SOURCES: STATISTA MARKET OUTLOOKS FOR E-COMMERCE, TRAVEL, MOBILITY, AND DIGITAL MEDIA (ACCESSED JANUARY 2020). FIGURES BASED ON ESTIMATES OF FULL-YEAR CONSUMER SPEND FOR 2019, EXCLUDING B2B SPEND. SEE [STATISTA.COM/OUTLOOK/DIGITAL-MARKETS](https://www.statista.com/outlook/digital-markets) FOR MORE DETAILS. **NOTES:** DATA FOR DIGITAL MUSIC AND VIDEO GAMES INCLUDE STREAMING. **COMPARABILITY ADVISORY:** BASE CHANGES. DEFINITIONS FOR CATEGORIES DENOTED BY (*) HAVE ALSO CHANGED. DATA MAY NOT BE DIRECTLY COMPARABLE TO PREVIOUS REPORTS.

we
are
social



Hootsuite®

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2020

ECOMMERCE GROWTH BY CATEGORY

YEAR-ON-YEAR GROWTH IN TOTAL AMOUNT SPENT IN CONSUMER ECOMMERCE CATEGORIES (2019 vs. 2018)



VIETNAM

FASHION
& BEAUTY



+17%

statista

ELECTRONICS &
PHYSICAL MEDIA



+13%



FOOD &
PERSONAL CARE



+24%

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FURNITURE &
APPLIANCES



+19%

TOYS, DIY
& HOBBIES



+20%



TRAVEL (INCLUDING
ACCOMMODATION)*



+12%

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are
social

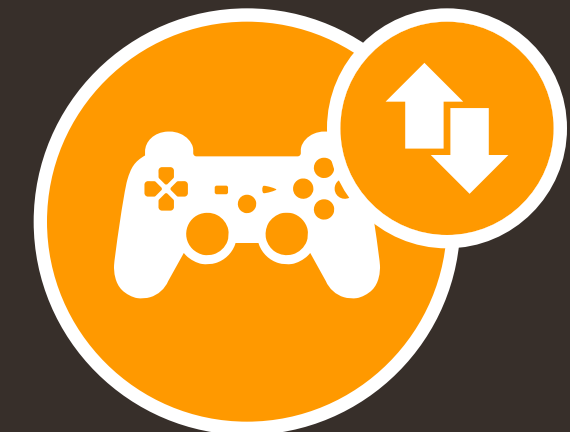
DIGITAL
MUSIC



+9.2%

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VIDEO
GAMES



+14%



JAN
2020

ONLINE PURCHASES OF CONSUMER GOODS

OVERVIEW OF THE MARKET FOR ONLINE CONSUMER GOODS PURCHASES IN 2019



VIETNAM

TOTAL NUMBER OF PEOPLE
PURCHASING CONSUMER
GOODS ONLINE IN 2019



54.70
MILLION

VALUE OF THE MARKET FOR
ONLINE CONSUMER GOODS
PURCHASES (IN U.S. DOLLARS)



\$2.96
BILLION

AVERAGE ANNUAL REVENUE PER
ONLINE CONSUMER GOODS
SHOPPER (ARPU) IN U.S. DOLLARS



\$54

ONLINE CONSUMER GOODS
ARPU AS A PERCENTAGE OF GDP
PER CAPITA (BOTH U.S. DOLLARS)



2.1%



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SOURCES: STATISTA MARKET OUTLOOK (ACCESSED JANUARY 2020). SEE [STATISTA.COM/OUTLOOK/DIGITAL-MARKETS](https://www.statista.com/outlook/digital-markets) FOR MORE DETAILS. ***NOTES:** FIGURES INCLUDE ONLINE B2C SPEND ON CONSUMER GOODS CATEGORIES ONLY (FASHION & BEAUTY, ELECTRONICS & PHYSICAL MEDIA, FOOD & DRINK, FURNITURE & APPLIANCES, AND TOYS, HOBBIES, & DIY), AND DO NOT INCLUDE SPEND ON TRAVEL, ACCOMMODATION, DIGITAL CONTENT, OR ANY B2B PURCHASES. **COMPARABILITY ADVISORY:** BASE CHANGES. DATA ARE NOT COMPARABLE TO PREVIOUS REPORTS.

JAN
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ECOMMERCE VALUE: ALTERNATIVE PERSPECTIVES

ALTERNATIVE PERSPECTIVES ON THE OVERALL SIZE, VALUE, AND GROWTH OF THE B2C ECOMMERCE MARKET (IN U.S. DOLLARS)



VIETNAM

TOTAL VALUE OF THE
CONSUMER (B2C)
ECOMMERCE MARKET



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\$6.00
BILLION

ANNUAL GROWTH
IN THE VALUE OF B2C
ECOMMERCE SPEND



+20%

B2C ECOMMERCE SPEND
AS A PERCENTAGE OF
TOTAL B2C RETAIL SPEND



1.0%

AVERAGE ANNUAL
ONLINE SPEND PER
B2C CONSUMER



\$95

MOBILE'S SHARE OF
B2C ECOMMERCE
TRANSACTION VALUE



48%



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2020

ECOMMERCE PURCHASES BY PAYMENT METHOD

PERCENTAGE OF ECOMMERCE TRANSACTIONS COMPLETED USING EACH METHOD OF PAYMENT



VIETNAM

CREDIT CARD



37%

CASH



17%

BANK TRANSFER



30%

EWALLET



11%

OTHER



6.0%

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KEPIOS

owl

lightbulb

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2020

DIGITAL PAYMENTS OVERVIEW

SIZE AND GROWTH OF THE DIGITAL PAYMENTS MARKET IN 2019 (IN U.S. DOLLARS)



VIETNAM

NUMBER OF PEOPLE
MAKING DIGITALLY ENABLED
PAYMENT TRANSACTIONS*



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51.10
MILLION

TOTAL ANNUAL VALUE
OF DIGITALLY ENABLED
CONSUMER PAYMENTS



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\$8.52
BILLION

ANNUAL CHANGE IN THE
VALUE OF DIGITALLY ENABLED
CONSUMER PAYMENTS



+20%

AVERAGE TOTAL ANNUAL VALUE OF
DIGITAL PAYMENT TRANSACTIONS
PER DIGITAL PAYMENTS USER



\$167



JAN
2020

RIDE-HAILING MARKET OVERVIEW

SIZE AND GROWTH OF THE RIDE-HAILING MARKET IN 2019 (IN U.S. DOLLARS)



VIETNAM

NUMBER OF PEOPLE
USING DIGITALLY ENABLED
RIDE-HAILING SERVICES*



4.70
MILLION

TOTAL VALUE OF THE
DIGITALLY ENABLED
RIDE-HAILING MARKET



\$471.0
MILLION

ANNUAL GROWTH IN THE TOTAL
VALUE OF THE DIGITALLY ENABLED
RIDE-HAILING MARKET



+32%

ANNUAL REVENUE PER
USER OF DIGITALLY ENABLED
RIDE-HAILING SERVICES



\$101



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SOURCES OF NEW BRAND DISCOVERY

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO SAY THEY DISCOVER NEW BRANDS AND PRODUCTS VIA EACH CHANNEL



VIETNAM

SEARCH ENGINES

40%

ADS ON TELEVISION

39%

TV SHOWS OR FILMS

30%

CONSUMER REVIEW WEBSITES

30%

BRAND OR PRODUCT WEBSITES

29%

WORD-OF-MOUTH RECOMMENDATIONS

28%

ADS ON WEBSITES

28%

POSTS ON BRANDS' SOCIAL MEDIA ACCOUNTS

28%

RECOMMENDATIONS OR COMMENTS ON SOCIAL MEDIA

27%

ADS IN SOCIAL MEDIA

26%

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TOP GOOGLE SHOPPING QUERIES

MOST COMMON GOOGLE SHOPPING SEARCH QUERIES THROUGHOUT 2019



VIETNAM

#	SEARCH QUERY	INDEX
01	GIÀY	100
02	ĐỒNG HỒ	92
03	IPHONE	70
04	SAMSUNG	68
05	ĐIỆN THOẠI	60
06	OPPO	37
07	XE MÁY	31
08	LAZADA	29
09	DỊCH	26
10	HONDA	23

#	SEARCH QUERY	INDEX
11	SHOPEE	23
12	GIÀY NỮ	21
13	TIKI	21
14	THE GIOI DI DONG	19
15	XIAOMI	19
16	GOOGLE	19
17	NIKE	18
18	YOUTUBE	17
19	ADIDAS	17
20	SENDO	17

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VALUE OF THE DIGITAL ADVERTISING MARKET

TOTAL SPEND (IN U.S. DOLLARS) ON DIGITAL ADVERTISING IN 2019, WITH DETAIL OF SPEND IN INDIVIDUAL SUB-CATEGORIES



VIETNAM

TOTAL DIGITAL AD
SPEND IN 2019



\$306.0
MILLION

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SPEND ON DIGITAL
SEARCH ADS IN 2019



\$118.0
MILLION

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SPEND ON SOCIAL
MEDIA ADS IN 2019



\$50.00
MILLION

SPEND ON DIGITAL
BANNER ADS IN 2019



\$54.00
MILLION

statista

SPEND ON DIGITAL
VIDEO ADS IN 2019



\$31.00
MILLION



SPEND ON DIGITAL
CLASSIFIED ADS IN 2019



\$53.00
MILLION

SOURCE: STATISTA MARKET OUTLOOK FOR DIGITAL ADVERTISING (ACCESSED JANUARY 2020). FIGURES REPRESENT FULL-YEAR DIGITAL ADVERTISING SPEND FOR 2019. SEE [STATISTA.COM/OUTLOOK/DIGITAL-MARKETS](https://www.statista.com/outlook/digital-markets) FOR MORE DETAILS. **NOTES:** SPEND VALUES ARE IN U.S. DOLLARS. INCLUDES ADVERTISING ON MOBILE AND DESKTOP DEVICES. VALUES DO NOT INCLUDE SPEND ON E-MAIL MARKETING, AUDIO ADVERTS, INFLUENCER MARKETING, SPONSORSHIPS, PRODUCT PLACEMENT, OR COMMISSION-BASED AFFILIATE SYSTEMS.



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DIGITAL ADVERTISING MARKET: VALUE GROWTH

YEAR-ON-YEAR CHANGE IN THE VALUE OF THE DIGITAL ADVERTISING MARKET BETWEEN 2018 AND 2019



VIETNAM

YEAR-ON-YEAR CHANGE
IN TOTAL DIGITAL AD SPEND



+9.2%

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YEAR-ON-YEAR CHANGE IN
DIGITAL SEARCH AD SPEND



+9.2%

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YEAR-ON-YEAR CHANGE IN
SOCIAL MEDIA AD SPEND



+17%

YEAR-ON-YEAR CHANGE IN
DIGITAL BANNER AD SPEND



+12%

statista

YEAR-ON-YEAR CHANGE IN
DIGITAL VIDEO AD SPEND



+7.7%



YEAR-ON-YEAR CHANGE IN
DIGITAL CLASSIFIED AD SPEND



+1.3%



CLICK THE LINKS BELOW TO ACCESS OUR FULL SUITE OF GLOBAL DIGITAL REPORTS

GLOBAL OVERVIEW	BOTSWANA	DJIBOUTI	GUINEA	LESOTHO	NEPAL	ST. KITTS & NEVIS	TAJIKISTAN
DIGITAL YEARBOOK	BRAZIL	DOMINICA	GUINEA-BISSAU	LIBERIA	NETHERLANDS	ST. LUCIA	TANZANIA
ABKHAZIA	BRITISH VIRGIN IS.	DOMINICAN REP.	GUYANA	LIBYA	NEW CALEDONIA	ST. MARTIN	THAILAND
AFGHANISTAN	BRUNEI	ECUADOR	HAITI	LIECHTENSTEIN	NEW ZEALAND	ST. PIERRE & MIQUELON	TIMOR-LESTE
ÅLAND IS.	BULGARIA	EGYPT	HONDURAS	LITHUANIA	NICARAGUA	ST. VINCENT & THE GRENADINES	TOGO
ALBANIA	BURKINA FASO	EL SALVADOR	HONG KONG	LUXEMBOURG	NIGER	SAMOA	TOKELAU
ALGERIA	BURUNDI	EQUATORIAL GUINEA	HUNGARY	MACAU	NIGERIA	SAN MARINO	TONGA
AMERICAN SAMOA	CABO VERDE	ERITREA	ICELAND	NORTH MACEDONIA	NIUE	SÃO TOMÉ & PRÍNCIPE	TRANSNISTRIA
ANDORRA	CAMBODIA	ESTONIA	INDIA	MADAGASCAR	NORFOLK IS.	SAUDI ARABIA	TRINIDAD & TOBAGO
ANGOLA	CAMEROON	ESWATINI	INDONESIA	MALAWI	NORTHERN MARIANA IS.	SENEGAL	TUNISIA
ANGUILLA	CANADA	ETHIOPIA	IRAN	MALAYSIA	NORWAY	SERBIA	TURKEY
ANTIGUA & BARBUDA	CAYMAN IS.	FALKLAND IS.	IRAQ	MALDIVES	OMAN	SEYCHELLES	TURKMENISTAN
ARGENTINA	CENTRAL AFRICAN REP.	FAROE IS.	IRELAND	MALI	PAKISTAN	SIERRA LEONE	TURKS & CAICOS IS.
ARMENIA	CHAD	FIJI	ISLE OF MAN	MALTA	PALAU	SINGAPORE	TUVALU
ARUBA	CHILE	FINLAND	ISRAEL	MARSHALL IS.	PALESTINE	ST. MAARTEN	UGANDA
AUSTRALIA	CHINA	FRANCE	ITALY	MARTINIQUE	PANAMA	SLOVAKIA	UKRAINE
AUSTRIA	CHRISTMAS IS.	FRENCH GUIANA	JAMAICA	MAURITANIA	PAPUA NEW GUINEA	SLOVENIA	U.A.E.
AZERBAIJAN	COCOS (KEELING) IS.	FRENCH POLYNESIA	JAPAN	MAURITIUS	PARAGUAY	SOLOMON IS.	U.K.
BAHAMAS	COLOMBIA	GABON	JERSEY	MAYOTTE	PERU	SOMALIA	U.S.A.
BAHRAIN	COMOROS	GAMBIA	JORDAN	MEXICO	PHILIPPINES	SOUTH AFRICA	U.S. VIRGIN IS.
BANGLADESH	DEM. REP. OF CONGO	GEORGIA	KAZAKHSTAN	MICRONESIA	PITCAIRN IS.	SOUTH SUDAN	URUGUAY
BARBADOS	REP. OF CONGO	GERMANY	KENYA	MOLDOVA	POLAND	SPAIN	UZBEKISTAN
BELARUS	COOK IS.	GHANA	KIRIBATI	MONACO	PORTUGAL	SRI LANKA	VANUATU
BELGIUM	COSTA RICA	GIBRALTAR	NORTH KOREA	MONGOLIA	PUERTO RICO	SUDAN	VATICAN
BELIZE	CÔTE D’IVOIRE	GREECE	SOUTH KOREA	MONTENEGRO	QATAR	SURINAME	VENEZUELA
BENIN	CROATIA	GREENLAND	KOSOVO	MONTSERRAT	RÉUNION	SVALBARD & JAN MAYEN	VIETNAM
BERMUDA	CUBA	GRENADA	KUWAIT	MOROCCO	ROMANIA	SWAZILAND	WALLIS & FUTUNA
BHUTAN	CURAÇAO	GUADELOUPE	KYRGYZSTAN	MOZAMBIQUE	RUSSIAN FEDERATION	SWEDEN	WESTERN SAHARA
BOLIVIA	CYPRUS	GUAM	LAOS	MYANMAR	RWANDA	SWITZERLAND	YEMEN
BONAIRE, ST. EUSTATIUS & SABA	CZECH REP.	GUATEMALA	LATVIA	NAMIBIA	ST. BARTHÉLEMY	SYRIA	ZAMBIA
BOSNIA & HERZEGOVINA	DENMARK	GUERNSEY	LEBANON	NAURU	ST. HELENA	TAIWAN	ZIMBABWE

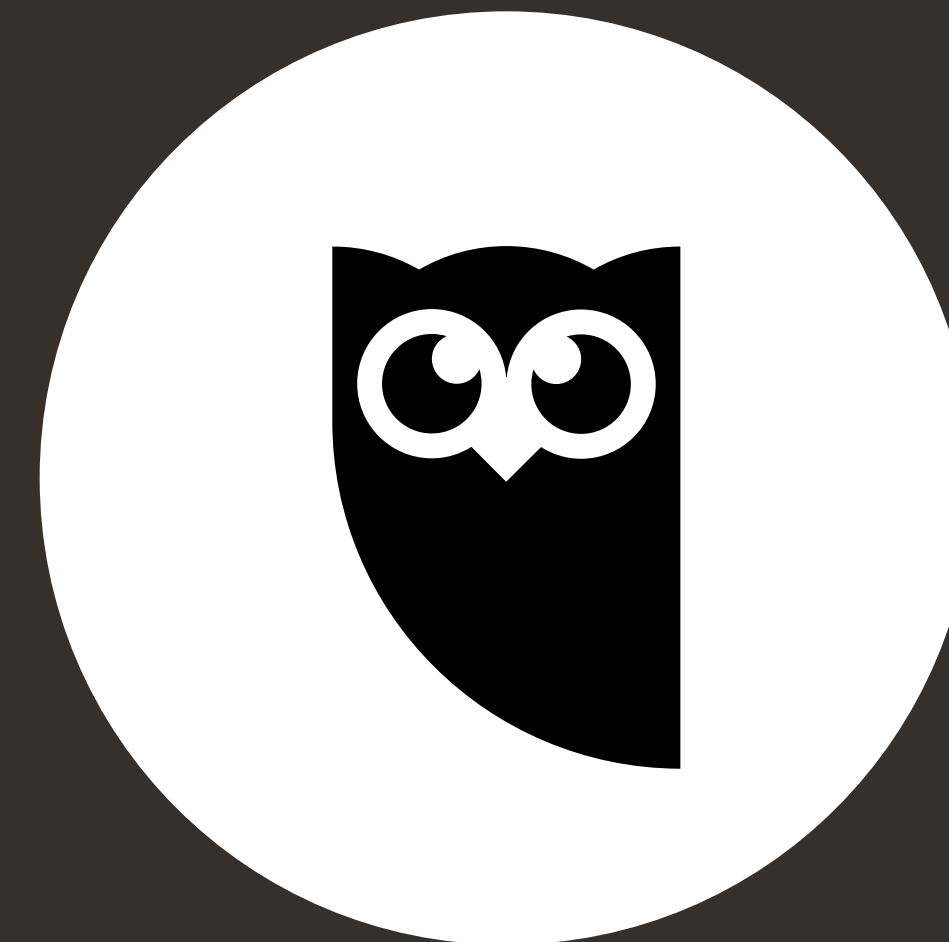


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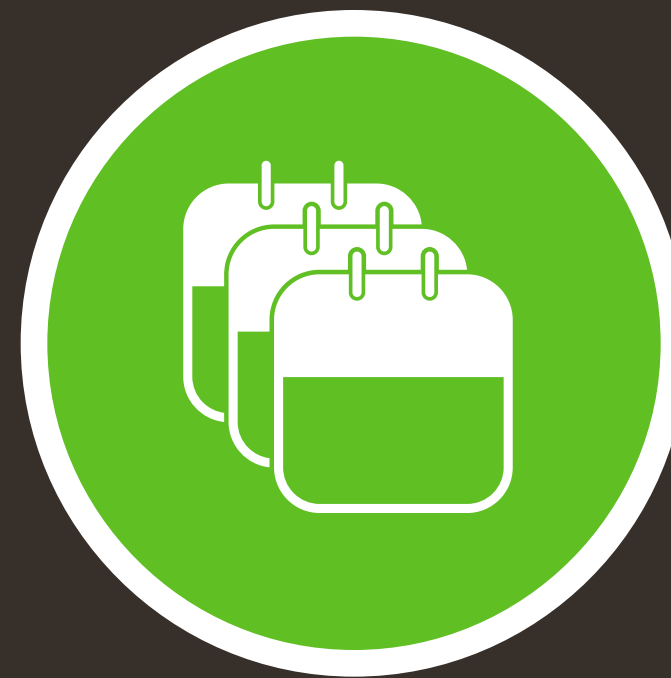
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COVERAGE**



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ACROSS 46 MARKETS**



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COVERAGE**

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INTERNET POPULATION**



**OVER 150 COUNTRIES
AND REGIONS**



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ECONOMIC POWER**



**MORE THAN 30,000
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The logo for GSMA Intelligence, featuring the text "GSMA" in a small red font above the word "Intelligence" in a larger black font, all contained within a white circular background.

GSMA Intelligence is the unit within the GSMA that houses the organisation's extensive database of mobile operator statistics, forecasts, and industry reports. GSMA Intelligence's data covers every operator group, network and MVNO in every country – from Afghanistan to Zimbabwe. Updated daily, it is the most accurate and complete set of industry metrics available, comprising tens of millions of individual data points.

Leading operators, vendors, regulators, financial institutions and third-party industry players rely on GSMA Intelligence to support strategic decision-making and long-term investment planning. The data is used as an industry reference point and is frequently cited by the media and by the industry itself. GSMA Intelligence's team of analysts and experts produce regular thought-leading research reports across a range of industry topics.

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SPECIAL THANKS: APP ANNIE



App Annie is the industry's most trusted mobile data and analytics platform. App Annie's mission is to help customers create winning mobile experiences and achieve excellence. The company created the mobile app data market and is committed to delivering the industry's most complete mobile performance offering. More than 1,100 enterprise clients and 1 million registered users across the globe and spanning all industries rely on App Annie as the standard to revolutionize their mobile business. The company is headquartered in San Francisco with 12 offices worldwide.



**1 MILLION
REGISTERED USERS**



**BEST-IN-CLASS
DATA**



**COVERAGE ACROSS
150 COUNTRIES**



**UNPARALLELED
SERVICE & SUPPORT**

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SimilarWeb provides the measure of the digital world. With an international online panel consisting of hundreds of millions of devices, SimilarWeb provides granular insights about any website or app across a wide array of industries. Global brands such as Google, eBay, and adidas rely on SimilarWeb to understand, track and grow their digital market share. The company has 450 employees and offices spanning four continents. SimilarWeb has been named one of Wall Street's Secret Weapons, and one of Calcalist's 2018 List of 50 Most Promising Israeli Startups.



**WEB
INTELLIGENCE**



**APP
INTELLIGENCE**



**GLOBAL
COVERAGE**



**GRANULAR
ANALYSIS**

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DATA SOURCES

POPULATION & DEMOGRAPHICS: United Nations World Population Prospects, 2019 Revision; US Census Bureau (accessed January 2020); United Nations World Urbanization Prospects, 2018 Revision; local government bodies (latest data available in January 2020). **Literacy rates:** UNESCO Institute for Statistics; UNICEF Data; World Bank DataBank; Pew Research; Ethnologue; IndexMundi; CIA World Factbook; Phrasebase (all accessed January 2020). **GDP and financial inclusions data:** World Bank DataBank; IMF Data; CIA World Factbook (all accessed January 2020). **Device ownership and time spent by media:** GlobalWebIndex (Q3 2019).*

INTERNET USERS: ITU Statistics; Eurostat Data Explorer; GlobalWebIndex; Facebook's self-serve advertising tools; local government authorities and telecom regulatory bodies; APJII (all accessed January 2020). **Mobile internet share** based on data from GlobalWebIndex (Q3 2019)*, and extrapolations of data reported in Facebook's self-serve advertising tools. **Internet connection speed** data from Ookla Speedtest (values for December 2019). **Time spent on the internet** from GlobalWebIndex (Q3 2019).* **World's top websites** from SimilarWeb (December 2019) and Alexa (monthly average based on 3-month period to mid-January 2020). **Web language** insights

via W3Techs (January 2020). **Google search** insights from Google Trends (data for full year 2019). Data on use of **data misuse fears**, **voice search**, and **ad blockers** from GlobalWebIndex (Q3 2019).* Data on concerns about '**fake news**' from Reuters Institute Digital News Report (2019 edition). **Content streaming** insights from GlobalWebIndex (Q3 2019).* **Smart Home** insights from Statista Digital Market Outlook* (accessed January 2020); GlobalWebIndex (Q3 2019).

SOCIAL MEDIA USERS & ADVERTISING

AUDIENCES: Social media platforms' self-service advertising tools (including extrapolations); company earnings announcements; press releases and promotional materials; remarks by senior platform executives at public events; statements on company websites; reports in reputable media (all latest data available in January 2020). **TikTok** data from a company sales presentation published by AdAge (October 2019). **YouTube** insights via YouTube press website (accessed January 2020). **Top messenger platforms** from SimilarWeb (January 2020, based on data for December 2019). **Time spent** on social media from GlobalWebIndex (Q3 2019)*. **Facebook and Instagram reach and engagement** data from Locowise (January 2020, based on averages for Q4 2019).

MOBILE USERS & CONNECTIONS: GSMA Intelligence (January 2020); Ericsson Mobility Report (November 2019); Ericsson Mobility Calculator and Visualizer tools (accessed January 2020). **Mobile Apps:** App Annie (January 2020); SimilarWeb (January 2020). **Mobile actions:** GlobalWebIndex (Q3 2019).

ECOMMERCE USERS & SPEND: Statista Digital Market Outlook* (accessed January 2020); GlobalWebIndex (Q3 2019)*; PPRO Payments & Ecommerce reports (2019 and 2020 editions). **Brand discovery channels:** GlobalWebIndex (Q3 2019). **Ride-Hailing** insights from Statista Digital Market Outlook* (accessed January 2020); GlobalWebIndex (Q3 2019). **Digital advertising market:** Statista Digital Market Outlook* (accessed January 2020); eMarketer (February 2019).

*For more details of GlobalWebIndex's methodology, visit <https://www.globalwebindex.com>.

*For more details of Statista's Market Outlook, visit <https://www.statista.com/outlook/digital-markets>.

NOTES ON DATA VARIANCE, MISMATCHES, AND CURIOSITIES

This report uses data from a wide variety of sources, including market research agencies, internet and social media companies, governments and public bodies, news media, journalists, and our own internal analysis.

Wherever possible, we've prioritised data sources that provide broader geographical coverage, in order to minimise the potential variations between data points, and offer more reliable comparison across countries. However, where we believe that an individual metric provides a more reliable reference, we've used such individual numbers to ensure the most accurate reporting.

Furthermore, due to differing data collection and treatment methodologies used by these organisations, and the different sample periods during which data were collected, there may be significant differences in the reported metrics for similar data points throughout this report. In particular, data collected via surveys often vary from one report to another, even if those data were collected by the same organisation using the same approach in each wave.

Similarly, reports of internet user numbers vary considerably between different sources. In part, this is because there are fewer commercial imperatives for governments and regulators to collect and publish regular internet user data. However, the user numbers published by social media platforms can be a useful proxy for the number of internet users in countries where no other reliable data are available, because all active social media users must have an active internet connection in order to access social media. These data are also more likely to be updated on a regular basis, as social media companies relies on this data to help sell their advertising products and services.

As a result, on occasion, we've used the latest addressable advertising audience data from social media platforms' self-service advertising tools to inform our internet user numbers, especially in less-developed economies, where 'official' internet user numbers are published less frequently. Consequently, there are a number of instances in this report where the reported number of social media users equals the reported number of internet users.

It's unlikely that one hundred percent of internet users in any given country will use the same social media platform though, so in cases where internet and social media user numbers are the same, it's likely that the actual number of internet users will be higher than the number we've reported.

Lastly, we've changed the source for a number of our data points in this year's reports, and a number of metrics that we reported in last year's Global Digital reports have also been revised by the original data provider since publication. As a result, some figures in this year's reports may appear to have changed in unexpected ways. Wherever we're aware of these changes, we've included details in the footnotes of each relevant chart, but please use caution when comparing data from different reports in case the original base has changed.

If you have any questions about specific data points in these reports, or if you'd like to offer your organisation's data for consideration in future reports, please email our reports team: reports@kepios.com.

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