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

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THƯ NGỎ

Trang điện tử Hướng nghiệp 4.0 (huongnghiep40.vn) ra đời với mục đích góp phần vào công cuộc định hướng nghề nghiệp cho các bạn học sinh THPT và sinh viên Việt Nam, trong bối cảnh cuộc Cách mạng công nghiệp 4.0 đã và đang bùng nổ mạnh mẽ hơn bao giờ hết. Bằng việc cung cấp những thông tin đa chiều, thiết thực và bổ ích về các ngành nghề có sức nóng và tiềm năng phát triển bền vững trong tương lai dài hạn thông qua các tin tức tổng hợp cùng những góc nhìn sâu rộng của các chuyên gia uy tín ở nhiều lĩnh vực như hướng nghiệp, khởi nghiệp, giáo dục, công nghệ thông tin, kinh tế, xã hội, tài chính ngân hàng…,trang điện tử huongnghiep40.vn được kỳ vọng sẽ mang đến những kiến thức nền tảng hữu ích về các ngành nghề trong xã hội cũng như thị trường nhân lực Việt Nam và thế giới.

Trang điện tử huongnghiep40.vn cam kết được xây dựng và phát triển với mục đích hoàn toàn phi lợi nhuận. Tất cả các bài viết và ebook được tổng hợp, đăng tải và chia sẻ tại đây đều có thể xem và tải về miễn phí, với mục đích góp thêm những cơ hội làm giàu kiến thức cho tất cả mọi người.

Chúc bạn đọc có được những thông tin bổ ích và định hướng nghề nghiệp đúng đắn cho tương lai.

Trân trọng,

Ban biên tập website huongnghiep40.vn

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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.

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	UNIQUE MOBILE PHONE USERS	INTERNET USERS	ACTIVE SOCIAL MEDIA USERS
7.75 BILLION	5.19 BILLION	4.54 BILLION	3.80 BILLION
URBANISATION: 55%	PENETRATION: 67%	PENETRATION: 59%	PENETRATION: 49%

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.

JAN 2020

GLOBAL DIGITAL GROWTH

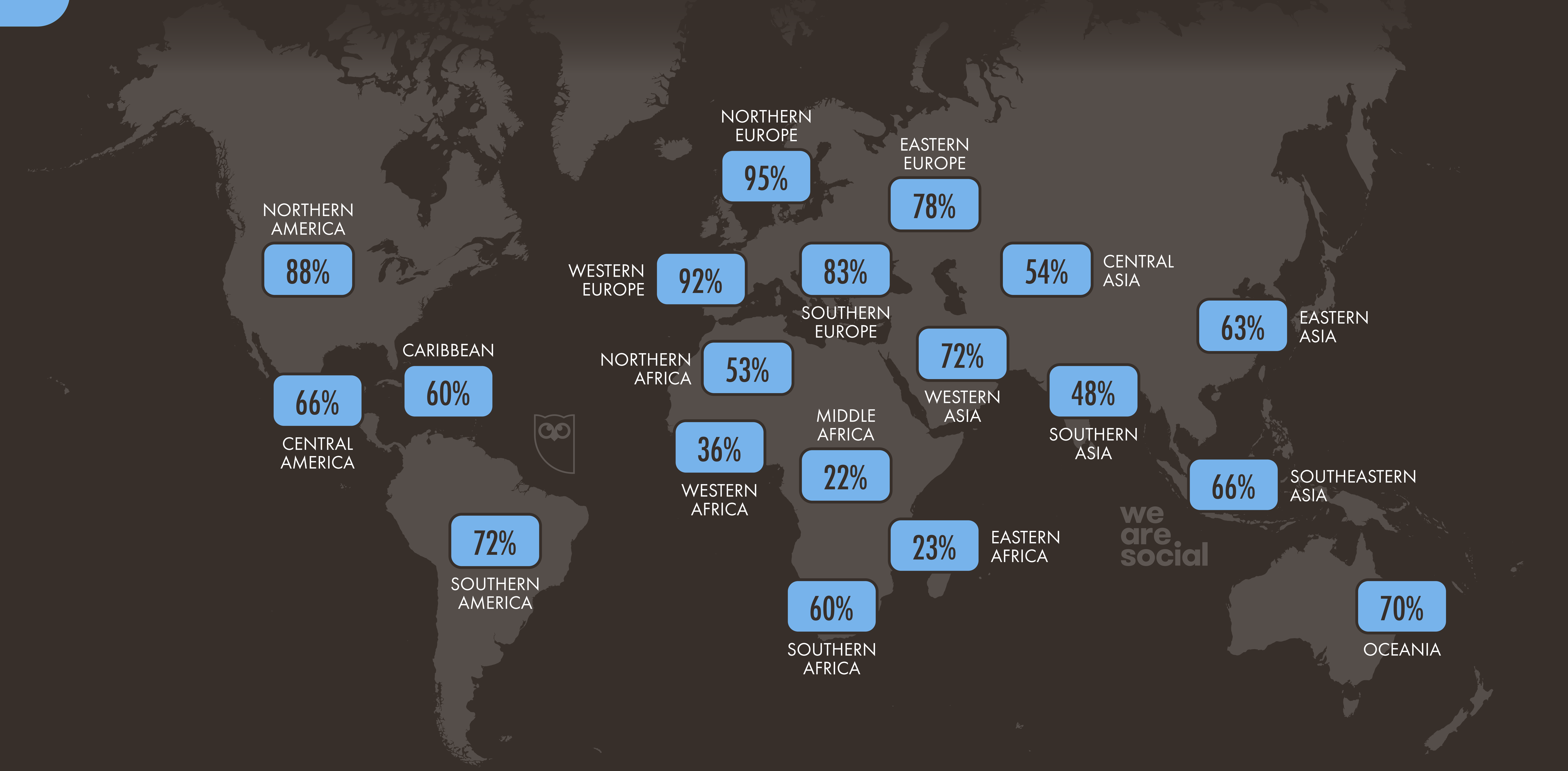
THE YEAR-ON-YEAR CHANGE IN ESSENTIAL INDICATORS OF DIGITAL ADOPTION

TOTAL POPULATION	UNIQUE MOBILE PHONE USERS	INTERNET USERS	ACTIVE SOCIAL MEDIA USERS
+1.1%	+2.4%	+7.0%	+9.2%
JAN 2020 vs. JAN 2019	JAN 2020 vs. JAN 2019	JAN 2020 vs. JAN 2019	JAN 2020 vs. JAN 2019
+82 MILLION	+124 MILLION	+298 MILLION	+321 MILLION

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.

INTERNET PENETRATION BY REGION

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

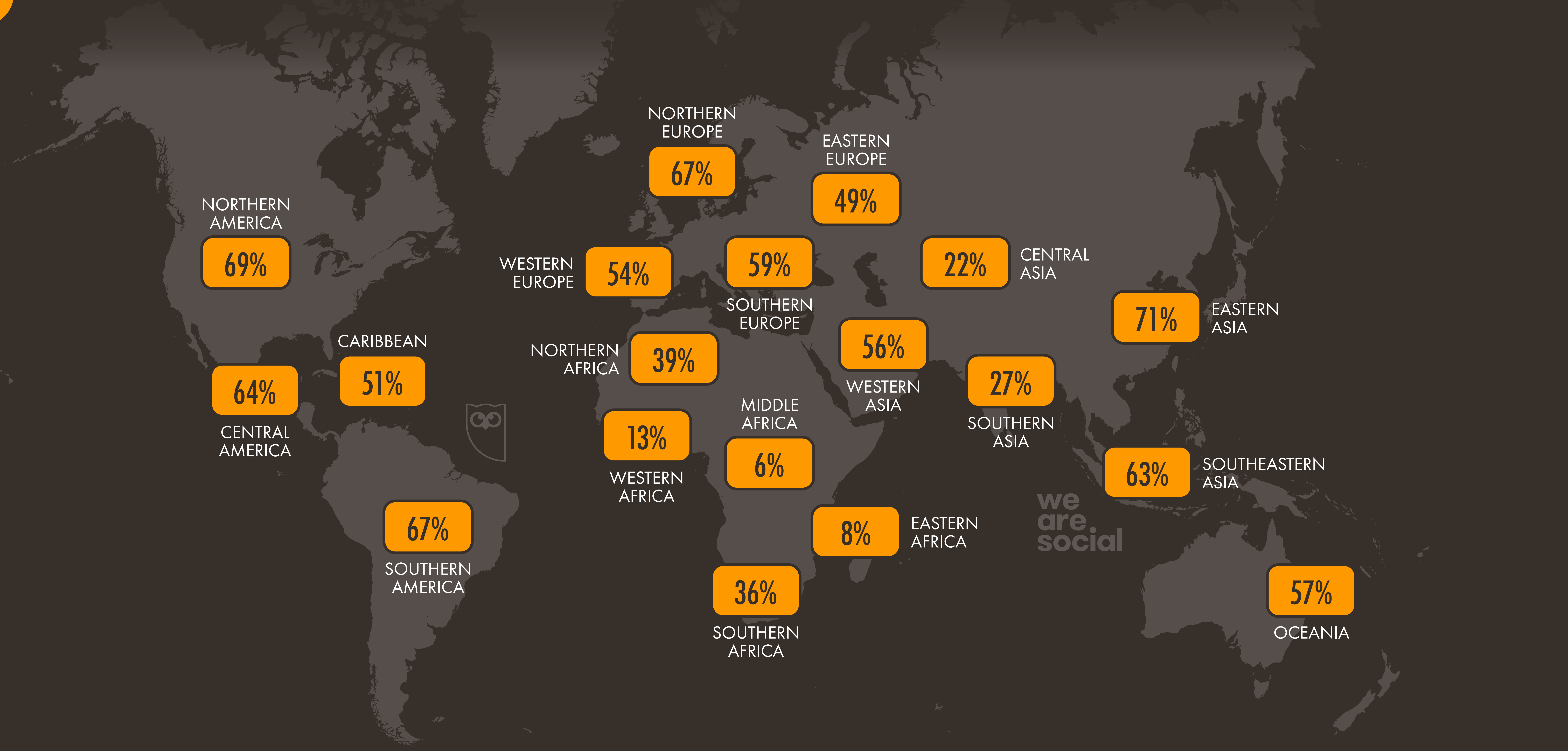


SOURCES: ITU; GLOBALWEBINDEX; GSMA INTELLIGENCE; EUROSTAT; SOCIAL MEDIA PLATFORMS' SELF-SERVICE ADVERTISING TOOLS; LOCAL GOVERNMENT BODIES AND REGULATORY AUTHORITIES; APJII; UNITED NATIONS. ***NOTE:** PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE. REGIONS AS DEFINED BY THE UNITED NATIONS GEOSCHEME.
◈ COMPARABILITY ADVISORY: IMPORTANT SOURCE CHANGES. FIGURES ARE NOT DIRECTLY COMPARABLE TO PREVIOUS REPORTS.

JAN 2020

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



SOURCES: KEPIOS ANALYSIS; COMPANY STATEMENTS AND EARNINGS ANNOUNCEMENTS; SOCIAL MEDIA PLATFORMS' SELF-SERVICE ADVERTISING TOOLS; MEDIASCOPE; CAFEBAZAAR (ALL LATEST DATA AVAILABLE IN JANUARY 2020). ***NOTES:** PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE. REGIONS AS DEFINED BY THE UNITED NATIONS GEOSCHEME. ◈ **COMPARABILITY ADVISORY:** SOURCE AND BASE CHANGES.

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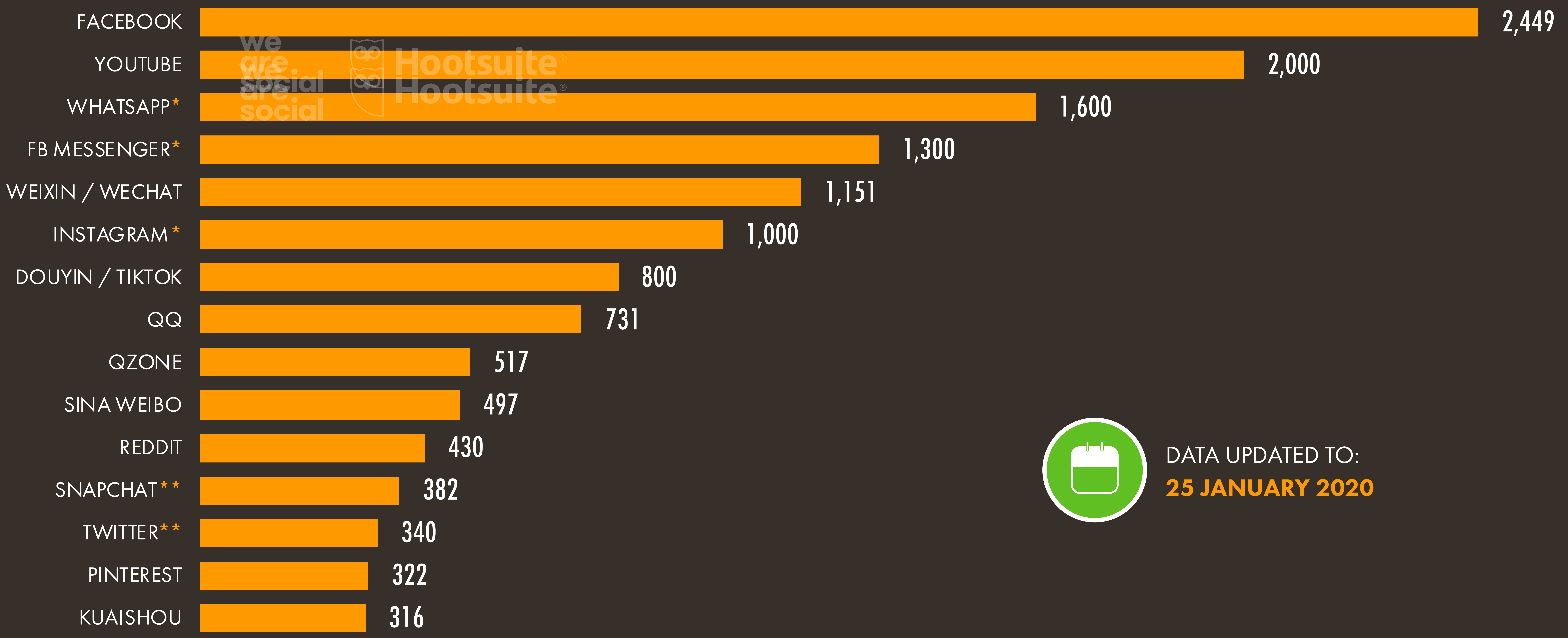
THE WORLD'S MOST-USED SOCIAL PLATFORMS

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

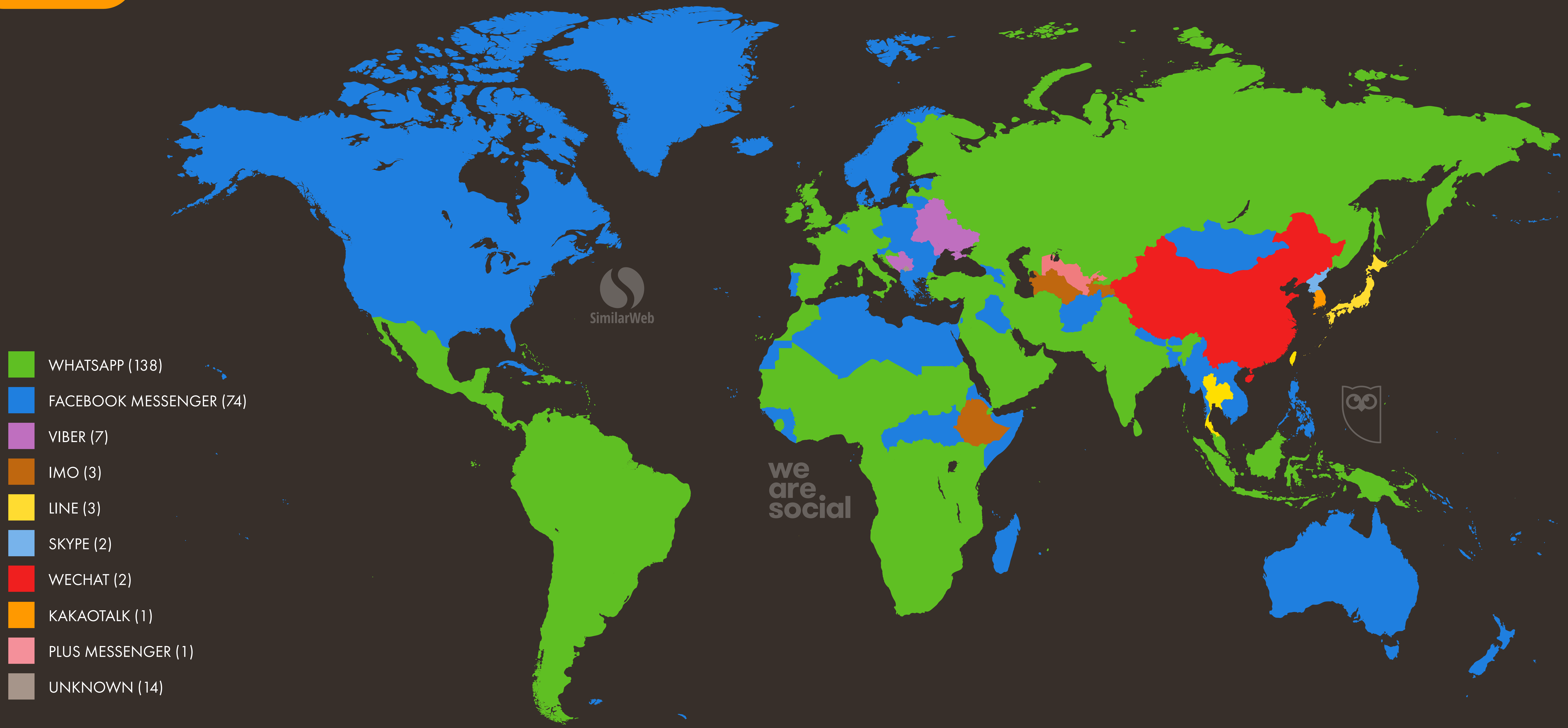


DATA UPDATED TO:
25 JANUARY 2020

SOURCES: KEPIOS ANALYSIS; COMPANY STATEMENTS AND EARNINGS ANNOUNCEMENTS; PLATFORMS' SELF-SERVICE ADVERTISING TOOLS (ALL LATEST AVAILABLE DATA). **NOTES:** PLATFORMS IDENTIFIED BY (*) HAVE NOT PUBLISHED UPDATED USER NUMBERS IN THE PAST 12 MONTHS. PLATFORMS IDENTIFIED BY (**) DO NOT PUBLISH MAU DATA. FIGURES FOR TWITTER AND SNAPCHAT USE EACH PLATFORM'S LATEST ADVERTISING AUDIENCE REACH FIGURE, AS REPORTED IN EACH PLATFORM'S SELF-SERVICE ADVERTISING TOOLS (JANUARY 2020).

TOP MESSENGER APPS AROUND THE WORLD

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

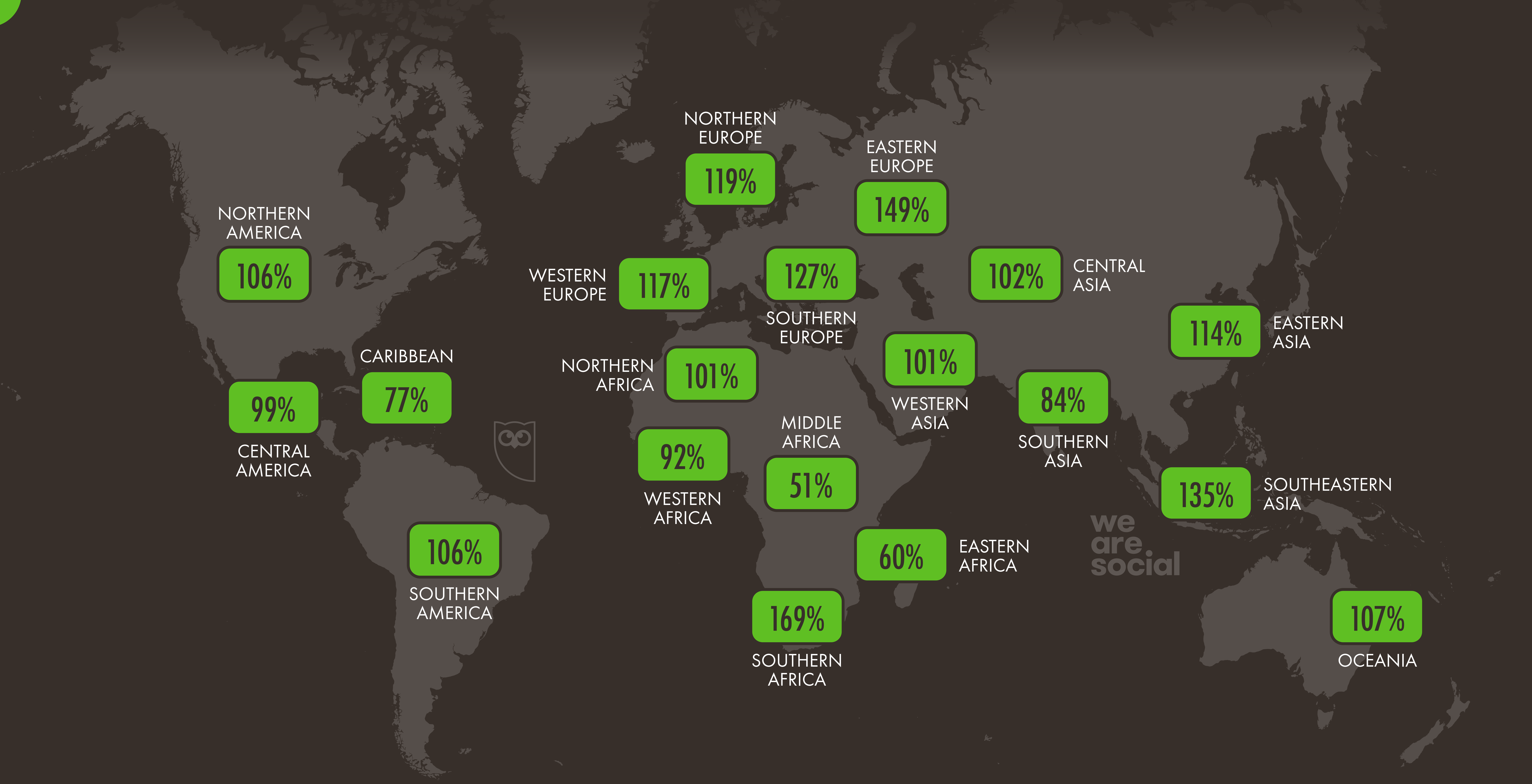


SOURCE: SIMILARWEB (JANUARY 2020). ***NOTES:** RANKINGS ARE BASED ON MESSENGER APPS WITH THE HIGHEST NUMBER OF AVERAGE DAILY ANDROID APP USERS IN EACH RESPECTIVE COUNTRY OR TERRITORY DURING DECEMBER 2019. FIGURES IN PARENTHESES IN THE LEGEND DENOTE THE NUMBER OF COUNTRIES OR TERRITORIES IN WHICH EACH APP IS THE TOP-RANKED MESSENGER. FIGURE FOR FACEBOOK MESSENGER INCLUDES MESSENGER LITE.

JAN 2020

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

SOURCE: APP ANNIE (JANUARY 2020). COMBINED DATA FOR ANDROID AND IOS DEVICES.

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)	VISITED AN ONLINE RETAIL STORE ON THE WEB (ANY DEVICE)	PURCHASED A PRODUCT ONLINE (ANY DEVICE)	MADE AN ONLINE PURCHASE VIA A LAPTOP OR DESKTOP COMPUTER	MADE AN ONLINE PURCHASE VIA A MOBILE DEVICE
80%	90%	74%	36%	52%

SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GLOBALWEBINDEX.COM FOR MORE DETAILS.

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

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TOTAL POPULATION	MOBILE PHONE CONNECTIONS	INTERNET USERS	ACTIVE SOCIAL MEDIA USERS
96.90 MILLION	145.8 MILLION	68.17 MILLION	65.00 MILLION
URBANISATION: 36%	vs. POPULATION: 150%	PENETRATION: 70%	PENETRATION: 67%

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.

DIGITAL GROWTH INDICATORS

CHANGES IN KEY INDICATORS OF DIGITAL ADOPTION

VIETNAM

TOTAL POPULATION	MOBILE PHONE CONNECTIONS	INTERNET USERS	ACTIVE SOCIAL MEDIA USERS
+0.9%	+1.9%	+10.0%	+9.6%
JAN 2020 vs. JAN 2019	JAN 2020 vs. JAN 2019	JAN 2020 vs. JAN 2019	JAN 2020 vs. APR 2019
+896 THOUSAND	+2.7 MILLION	+6.2 MILLION	+5.7 MILLION

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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OVERVIEW OF THE POPULATION

CORE DEMOGRAPHIC INDICATORS

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TOTAL POPULATION	FEMALES AS A PERCENTAGE OF POPULATION*	MALES AS A PERCENTAGE OF POPULATION*	ANNUAL CHANGE IN TOTAL POPULATION	MEDIAN AGE
96.90 MILLION	50%	50%	+0.9% +896 THOUSAND	32.5

URBAN POPULATION AS A SHARE OF TOTAL POPULATION	POPULATION DENSITY (PEOPLE PER KM²)	OVERALL LITERACY RATE (ADULTS AGED 15+)	FEMALE LITERACY RATE (ADULTS AGED 15+)	MALE LITERACY RATE (ADULTS AGED 15+)
36%	313.9	95%	94%	96%

SOURCES: UNITED NATIONS; U.S. CENSUS BUREAU; WORLD BANK; IMF; UNESCO; UNICEF; CIA WORLD FACTBOOK; PEW RESEARCH (ALL LATEST DATA AVAILABLE IN JANUARY 2020). **NOTE:** NEITHER THE UNITED NATIONS NOR THE U.S. CENSUS BUREAU PUBLISH DATA FOR GENDERS OTHER THAN 'FEMALE' OR 'MALE'. DATA AND GENDER DEFINITIONS AS REPORTED BY EACH RESPECTIVE ORGANISATION, BASED ON AVAILABLE DATA.

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POPULATION BY AGE GROUP

THE TOTAL NUMBER OF PEOPLE WITHIN EACH AGE GROUP

VIETNAM

TOTAL POPULATION	POPULATION AGED 13 AND ABOVE	POPULATION AGED 18 AND ABOVE	POPULATION AGED 16 TO 64
96.90 MILLION	80% 77.1 MILLION	73% 70.5 MILLION	68% 65.6 MILLION

SOURCES: UNITED NATIONS; U.S. CENSUS BUREAU (LATEST DATA AVAILABLE IN JANUARY 2020).

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DEVICE OWNERSHIP

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

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MOBILE PHONE (ANY TYPE)	SMART PHONE	NON-SMARTPHONE MOBILE PHONE	LAPTOP OR DESKTOP COMPUTER	TABLET DEVICE
94%	93%	22%	65%	32%
DEVICE FOR STREAMING TV CONTENT OVER THE INTERNET	GAMES CONSOLE	SMART HOME DEVICE	SMART WATCH OR WRISTBAND	VIRTUAL REALITY DEVICE
9.6%	6.9%	13%	18%	3.1%

SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64.

DAILY TIME SPENT WITH MEDIA

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

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USING THE INTERNET	USING SOCIAL MEDIA	WATCHING TELEVISION*	LISTENING TO MUSIC STREAMING SERVICES	USING A GAMES CONSOLE
6H 30M	2H 22M	2H 09M	1H 01M	1H 00M

SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GLOBALWEBINDEX.COM FOR MORE DETAILS. *NOTES: TELEVISION TIME INCLUDES BROADCAST (LINEAR) TELEVISION AND CONTENT DELIVERED VIA STREAMING AND VIDEO-ON-DEMAND SERVICES. USE OF DIFFERENT DEVICES AND CONSUMPTION OF DIFFERENT MEDIA MAY OCCUR CONCURRENTLY.

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

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TOTAL NUMBER OF INTERNET USERS ON ANY DEVICE	INTERNET USERS AS A PERCENTAGE OF TOTAL POPULATION	ANNUAL GROWTH IN THE NUMBER OF INTERNET USERS	AVERAGE DAILY TIME SPENT USING THE INTERNET ON ANY DEVICE BY EACH INTERNET USER
68.17 MILLION	70%	+10.0% +6.2 MILLION	6H 30M

SOURCES: ITU; GLOBALWEBINDEX; GSMA INTELLIGENCE; EUROSTAT; SOCIAL MEDIA PLATFORMS' SELF-SERVICE ADVERTISING TOOLS; LOCAL GOVERNMENT BODIES AND REGULATORY AUTHORITIES; APJII; UNITED NATIONS (ALL LATEST AVAILABLE DATA IN JANUARY 2020). TIME SPENT DATA FROM GLOBALWEBINDEX (Q3 2019), BASED ON A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GLOBALWEBINDEX.COM FOR MORE DETAILS. ◈ COMPARABILITY ADVISORY: SOURCE CHANGES.

MOBILE INTERNET USE

INTERNET USERS WHO ACCESS THE INTERNET VIA MOBILE PHONES

VIETNAM

TOTAL NUMBER OF MOBILE INTERNET USERS	MOBILE INTERNET USERS AS A PERCENTAGE OF TOTAL INTERNET USERS	SHARE OF ALL INTERNET USERS ACCESSING VIA SMARTPHONES*	SHARE OF ALL INTERNET USERS ACCESSING VIA FEATURE PHONES*	AVERAGE DAILY TIME SPENT USING THE INTERNET ON MOBILE DEVICES
65.99 MILLION	97%	96%	3.2%	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

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AVERAGE SPEED OF MOBILE INTERNET CONNECTIONS	YEAR-ON-YEAR CHANGE IN AVERAGE SPEED OF MOBILE INTERNET CONNECTIONS	AVERAGE SPEED OF FIXED INTERNET CONNECTIONS	YEAR-ON-YEAR CHANGE IN AVERAGE SPEED OF FIXED INTERNET CONNECTIONS
30.39 MBPS	+41%	43.26 MBPS	+59%

SOURCE: OOKLA (JANUARY 2020). FIGURES REPRESENT AVERAGE DOWNLOAD SPEEDS IN DECEMBER 2019, WITH COMPARISONS TO AVERAGE DOWNLOAD SPEEDS IN DECEMBER 2018.

SHARE OF WEB TRAFFIC BY DEVICE

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

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MOBILE PHONES	LAPTOPS & DESKTOPS	TABLET COMPUTERS	OTHER DEVICES
16.2%	82.6%	1.1%	[N/A]
DEC 2019 vs. DEC 2018: +1.2%	DEC 2019 vs. DEC 2018: +0.5%	DEC 2019 vs. DEC 2018: -36%	DEC 2019 vs. DEC 2018: [N/A]

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

SOURCE: ALEXA (JANUARY 2020). ***NOTES:** 'ALEXA' IS THE NAME OF AMAZON'S INSIGHTS ARM, AND DATA SHOWN HERE ARE NOT RESTRICTED TO ACTIVITIES ON 'ALEXA' VOICE-POWERED PLATFORMS. 'TIME / DAY' FIGURES REPRESENT ALEXA'S ESTIMATES OF THE AVERAGE DAILY AMOUNT OF TIME THAT VISITORS SPEND ON EACH SITE, ON DAYS THEY VISIT EACH SITE, MEASURED IN MINUTES AND SECONDS. **ADVISORY:** SOME WEBSITES FEATURED IN THIS RANKING MAY CONTAIN ADULT CONTENT. PLEASE USE CAUTION WHEN VISITING UNKNOWN WEBSITES.

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

SOURCE: GOOGLE TRENDS (ACCESSED JANUARY 2020); KEPIOS ANALYSIS. **NOTES:** GOOGLE DOES NOT PUBLISH SEARCH VOLUMES, BUT THE "INDEX" COLUMN SHOWS THE RELATIVE VOLUME FOR EACH QUERY COMPARED TO THE SEARCH VOLUME OF THE TOP QUERY (AN INDEX OF 50 MEANS THAT THE QUERY RECEIVED 50% OF THE SEARCH VOLUME OF THE TOP QUERY).

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	WATCH VLOGS	LISTEN TO MUSIC STREAMING SERVICES	LISTEN TO ONLINE RADIO STATIONS	LISTEN TO PODCASTS
95%	57%	73%	46%	33%

SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GLOBALWEBINDEX.COM FOR MORE DETAILS.

JAN 2020

ONLINE PRIVACY AND WELL-BEING

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

VIETNAM

TRACKED SCREEN TIME OR SET TIME LIMITS FOR SOME APPS IN THE PAST MONTH	EXPRESSED CONCERN ABOUT WHAT'S REAL OR FAKE ON THE INTERNET*	EXPRESSED CONCERN ABOUT HOW COMPANIES USE THEIR PERSONAL DATA	USED SOME FORM OF AD-BLOCKING TOOL IN THE PAST MONTH (ANY DEVICE)	DELETED COOKIES FROM A WEB BROWSER IN THE PAST MONTH (ANY DEVICE)
34%	[N/A]	60%	43%	56%

SOURCES: GLOBALWEBINDEX (Q3 2019), EXCEPT (*) REUTERS INSTITUTE DIGITAL NEWS REPORT (2019 EDITION). GLOBALWEBINDEX FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GLOBALWEBINDEX.COM FOR MORE DETAILS. (*) REUTERS INSTITUTE DIGITAL NEWS REPORT FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF ADULTS AGED 18 AND ABOVE.

JAN 2020

PLAYING GAMES: DEVICE PERSPECTIVE

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

VIETNAM

ANY DEVICE	SMART PHONE	PC (LAPTOP OR DESKTOP)	GAMES CONSOLE	TABLET COMPUTER
90%	85%	50%	9.1%	26%

SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GLOBALWEBINDEX.COM FOR MORE DETAILS.

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*	PLAYED A GAME ON A CLOUD GAMING OR STREAMING PLATFORM	SHARED IMAGES OR VIDEOS OF OWN GAMEPLAY	WATCHED A LIVE STREAM OF OTHER PEOPLE PLAYING GAMES	WATCHED AN ESPORTS TOURNAMENT
6.1%	13%	12%	26%	18%

SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GLOBALWEBINDEX.COM FOR MORE DETAILS.
***NOTE:** "DLC" STANDS FOR (ADDITIONAL) DOWNLOADABLE CONTENT, OFTEN AVAILABLE VIA IN-APP PURCHASES.

JAN 2020

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)	WATCH TV CONTENT VIA A STREAMING SUBSCRIPTION SERVICE EACH MONTH	OWN SOME FORM OF SMART HOME DEVICE	OWN SOME FORM OF CRYPTOCURRENCY
41%	60%	13%	7.5%

SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GLOBALWEBINDEX.COM FOR MORE DETAILS.

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

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

VALUE OF SMART HOME ENTERTAINMENT DEVICE MARKET

$18.00 MILLION

VALUE OF SMART HOME COMFORT & LIGHTING MARKET

$8.00 MILLION

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 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.).

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*	Y-O-Y VALUE CHANGE: OVERALL SMART HOME DEVICES MARKET	Y-O-Y VALUE CHANGE: SMART HOME CONTROL & CONNECTIVITY MARKET	Y-O-Y VALUE CHANGE: SMART HOME APPLIANCES MARKET
+64%	+63%	+85%	+64%

Y-O-Y VALUE CHANGE: SMART HOME SECURITY DEVICE MARKET	Y-O-Y VALUE CHANGE: SMART HOME ENTERTAINMENT DEVICE MARKET	Y-O-Y VALUE CHANGE: SMART HOME COMFORT & LIGHTING MARKET	Y-O-Y VALUE CHANGE: SMART HOME ENERGY MANAGEMENT MARKET
+56%	+54%	+61%	+73%

SOURCE: STATISTA MARKET OUTLOOK FOR THE SMART HOME CATEGORY (ACCESSED JANUARY 2020). GROWTH FIGURES REPRESENT THE YEAR-ON-YEAR CHANGE IN ESTIMATES OF FULL-YEAR REVENUE FOR 2019 COMPARED TO 2018. SEE STATISTA.COM/OUTLOOK/DIGITAL-MARKETS FOR MORE DETAILS. ***NOTES:** "PENETRATION" REFERS TO THE NUMBER OF HOMES WITH SMART HOME DEVICES. "Y-O-Y VALUE CHANGE" FIGURES REFER TO THE YEAR-ON-YEAR CHANGE IN REVENUE.

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*	ARPU*: COMBINED SPEND ON ALL SMART HOME DEVICES	ARPU*: SMART HOME CONTROL & CONNECTIVITY DEVICES	ARPU*: SMART HOME APPLIANCES
1.8%	$300	$56	$231

ARPU*: SMART HOME SECURITY DEVICES	ARPU*: SMART HOME ENTERTAINMENT DEVICES	ARPU*: SMART HOME COMFORT & LIGHTING	ARPU*: SMART HOME ENERGY MANAGEMENT
$148	$76	$36	$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 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	SOCIAL MEDIA USERS COMPARED TO TOTAL POPULATION	CHANGE IN SOCIAL MEDIA USER NUMBERS (APR 2019 TO JAN 2020)	PERCENTAGE OF ACTIVE SOCIAL MEDIA USERS ACCESSING VIA MOBILE
65.00 MILLION	67%	+9.6% +5.7 MILLION	99%

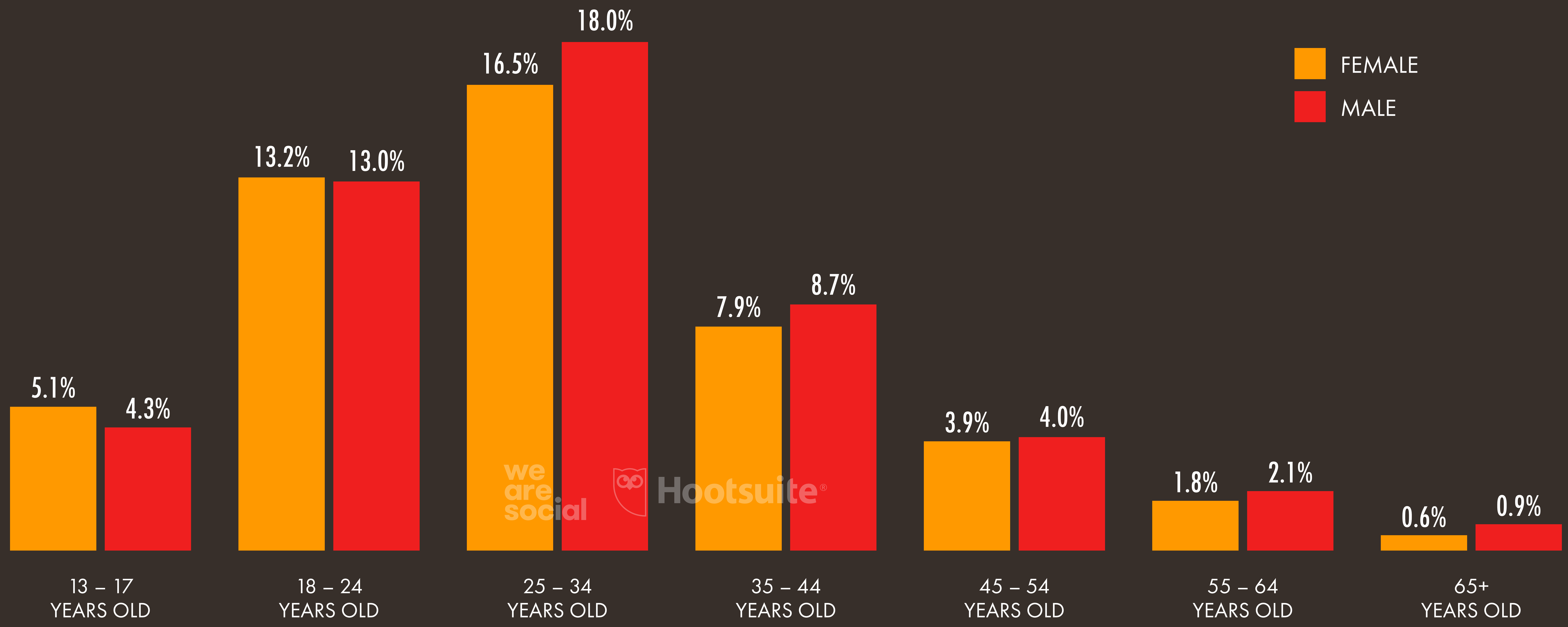
SOURCES: BASED ON DATA PUBLISHED IN SELECTED SOCIAL MEDIA PLATFORMS' SELF-SERVICE ADVERTISING TOOLS (JANUARY 2020), COMPANY STATEMENTS, EARNINGS ANNOUNCEMENTS AND MEDIA REPORTS (ALL LATEST DATA AVAILABLE IN JANUARY 2020), WITH COMPARISONS TO POPULATION DATA FROM THE UNITED NATIONS (LATEST DATA AVAILABLE IN JANUARY 2020). ◈ **COMPARABILITY ADVISORY:** SOURCE AND BASE CHANGES.

JAN 2020

SOCIAL MEDIA ADVERTISING AUDIENCE PROFILE

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

VIETNAM



SOURCE: EXTRAPOLATIONS OF DATA FROM FACEBOOK'S SELF-SERVICE ADVERTISING TOOLS (JANUARY 2020). BASED ON ACTIVE USERS OF FACEBOOK, INSTAGRAM, AND / OR FACEBOOK MESSENGER. ***NOTES:** FACEBOOK'S TOOLS DO NOT PUBLISH AUDIENCE DATA FOR GENDERS OTHER THAN 'MALE' OR 'FEMALE'. ***ADVISORY:** DATA ON THIS CHART REPRESENT THE SOCIAL MEDIA ADVERTISING AUDIENCE ONLY, AND MAY NOT CORRELATE TO RESPECTIVE SHARES OF TOTAL MONTHLY ACTIVE SOCIAL MEDIA USERS. ◈ **COMPARABILITY ADVISORY:** BASE CHANGES.

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*	ACTIVELY ENGAGED WITH OR CONTRIBUTED TO SOCIAL MEDIA IN THE PAST MONTH	AVERAGE AMOUNT OF TIME PER DAY SPENT USING SOCIAL MEDIA	AVERAGE NUMBER OF SOCIAL MEDIA ACCOUNTS PER INTERNET USER*	PERCENTAGE OF INTERNET USERS WHO USE SOCIAL MEDIA FOR WORK PURPOSES
96%	89%	2H 22M	8.9	58%

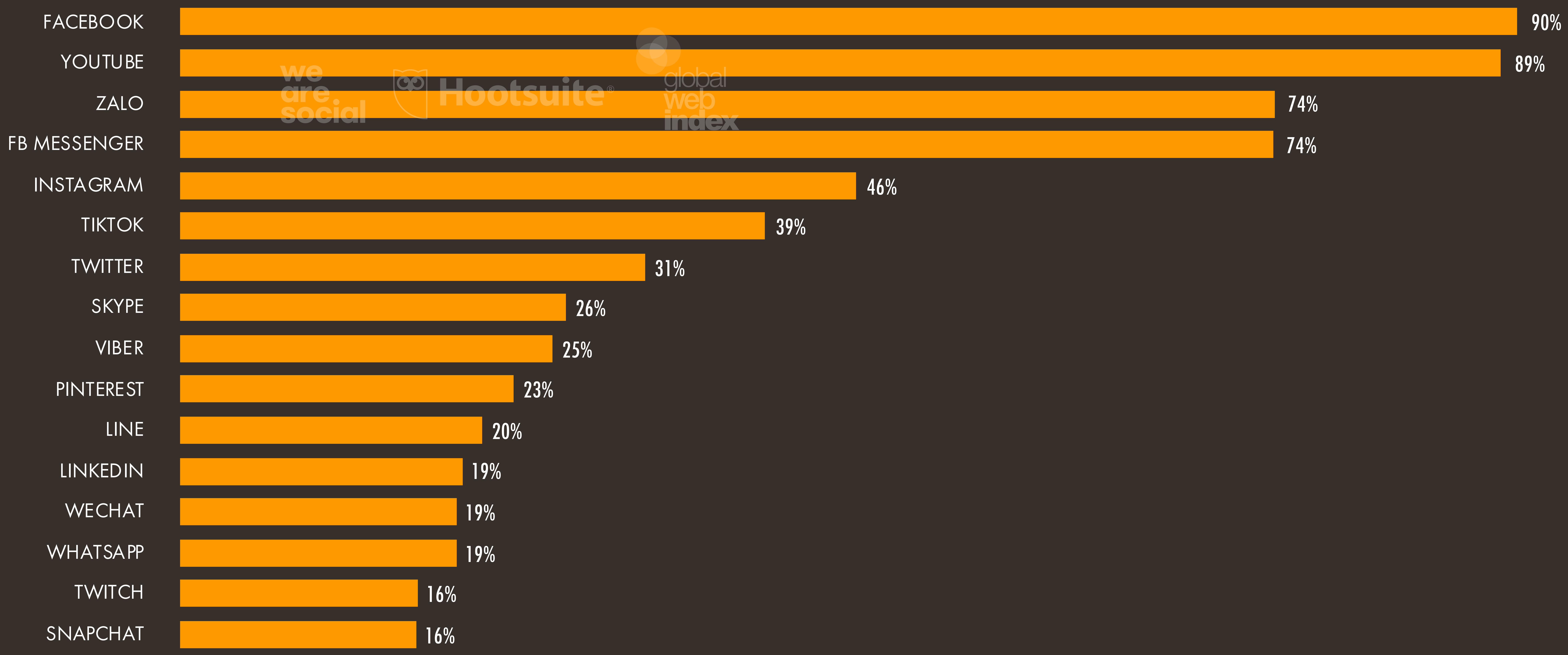
SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GLOBALWEBINDEX.COM FOR MORE DETAILS. ***NOTE:** FIGURE FOR SOCIAL MEDIA ACCOUNTS MAY NOT INDICATE ACTIVE USE OF ALL ACCOUNTS EVERY MONTH. ***ADVISORY:** FIGURE FOR PERCENTAGE OF INTERNET 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.

JAN 2020

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 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	FACEBOOK'S REPORTED ADVERTISING REACH COMPARED TO TOTAL POPULATION AGED 13+	QUARTER-ON-QUARTER CHANGE IN FACEBOOK'S ADVERTISING REACH	PERCENTAGE OF ITS AD AUDIENCE THAT FACEBOOK REPORTS IS FEMALE*	PERCENTAGE OF ITS AD AUDIENCE THAT FACEBOOK REPORTS IS MALE*
61.00 MILLION	79%	+1.7% +1.0 MILLION	49.2%	50.8%

SOURCES: FACEBOOK'S SELF-SERVICE ADVERTISING TOOLS (ACCESSED JANUARY 2020); POPULATION DATA FROM THE U.N. **NOTE:** FACEBOOK DOES NOT PUBLISH ADVERTISING AUDIENCE DATA FOR GENDERS OTHER THAN 'MALE' AND 'FEMALE'. **ADVISORY:** FIGURES REPORTED ON THIS CHART ARE BASED ON FACEBOOK'S ADDRESSABLE ADVERTISING AUDIENCE, AND MAY NOT MATCH TOTAL ACTIVE USERS. ◈ **COMPARABILITY ADVISORY:** BASE CHANGES. DATA MAY NOT BE COMPARABLE TO FIGURES PUBLISHED IN PREVIOUS REPORTS.

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	PERCENTAGE OF FACEBOOK USERS WHO ONLY ACCESS VIA A LAPTOP OR DESKTOP COMPUTER	PERCENTAGE OF FACEBOOK USERS WHO ACCESS VIA BOTH PHONES AND COMPUTERS	PERCENTAGE OF FACEBOOK USERS WHO ONLY ACCESS VIA A MOBILE PHONE
98.7%	1.3%	19.8%	78.8%

SOURCE: EXTRAPOLATIONS OF DATA FROM FACEBOOK'S SELF-SERVICE ADVERTISING TOOLS (JANUARY 2020). BASED ON FACEBOOK USERS AGED 18 AND ABOVE.

JAN 2020

FACEBOOK ACTIVITY FREQUENCY

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

VIETNAM

NUMBER OF FACEBOOK PAGES LIKED (LIFETIME*)	POSTS LIKED IN THE PAST 30 DAYS (ALL POST TYPES)	COMMENTS MADE IN THE PAST 30 DAYS (ALL POST TYPES)	FACEBOOK POSTS SHARED IN THE PAST 30 DAYS (ALL POST TYPES)	FACEBOOK ADVERTS CLICKED IN THE PAST 30 DAYS (ANY CLICK TYPE)
1	9	8	2	17
FEMALE: 1	FEMALE: 11	FEMALE: 10	FEMALE: 2	FEMALE: 20
MALE: 1	MALE: 7	MALE: 6	MALE: 1	MALE: 15

SOURCE: FACEBOOK (JANUARY 2020). *NOTE: FIGURES REPRESENT MEDIAN VALUES FOR ACTIVE FACEBOOK USERS AGED 18 AND ABOVE. FIGURE FOR THE NUMBER OF FACEBOOK PAGES LIKED IS THE MEDIAN NUMBER OF PAGES THAT THE TYPICAL FACEBOOK USER HAS 'LIKED' IN ALL THE TIME THEY HAVE BEEN USING FACEBOOK, NOT JUST IN THE PAST MONTH. FOR REFERENCE, THE WORLDWIDE MEDIAN IS JUST ONE PAGE.

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	AVERAGE POST REACH vs. PAGE LIKES	AVERAGE ORGANIC REACH vs. PAGE LIKES	PERCENTAGE OF PAGES USING PAID MEDIA	AVERAGE PAID REACH vs. TOTAL REACH
+0.16%	7.6%	5.7%	25.2%	32.2%

SOURCE: LOCOWISE (JANUARY 2020). FIGURES REPRESENT AVERAGES FOR Q4 2019. *ADVISORY: FIGURES REPRESENT AVERAGES FOR A BROAD RANGE OF DIFFERENT PAGES AND PAGE TYPES, AND PAGES WITH A GREATER NUMBER OF "PAGE LIKES" WILL TYPICALLY EXPERIENCE SIGNIFICANTLY LOWER LEVELS OF ORGANIC REACH COMPARED TO THE AVERAGES QUOTED HERE.

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	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE VIDEO POSTS	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE IMAGE POSTS	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE LINK POSTS	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE STATUS POSTS
4.00%	9.86%	4.29%	4.28%	1.17%

SOURCE: LOCOWISE (JANUARY 2020). FIGURES REPRESENT AVERAGES FOR Q4 2019. ***ADVISORY:** FIGURES REPRESENT AVERAGES FOR A BROAD RANGE OF DIFFERENT PAGES AND PAGE TYPES, AND PAGES WITH A GREATER NUMBER OF "PAGE LIKES" WILL TYPICALLY EXPERIENCE SIGNIFICANTLY LOWER LEVELS OF ENGAGEMENT COMPARED TO THE AVERAGES QUOTED HERE.

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	INSTAGRAM'S REPORTED ADVERTISING REACH COMPARED TO TOTAL POPULATION AGED 13+	QUARTER-ON-QUARTER CHANGE IN INSTAGRAM'S ADVERTISING REACH	PERCENTAGE OF ITS AD AUDIENCE THAT INSTAGRAM REPORTS IS FEMALE*	PERCENTAGE OF ITS AD AUDIENCE THAT INSTAGRAM REPORTS IS MALE*
5.40 MILLION	7.0%	+10%	61.1%	38.9%

SOURCE: FACEBOOK'S SELF-SERVICE ADVERTISING TOOLS FOR INSTAGRAM (ACCESSED JANUARY 2020); POPULATION DATA FROM THE U.N. **NOTE:** FACEBOOK'S TOOLS DO NOT PUBLISH ADVERTISING AUDIENCE DATA FOR GENDERS OTHER THAN 'MALE' AND 'FEMALE'. **ADVISORY:** FIGURES REPORTED ON THIS CHART ARE BASED ON INSTAGRAM'S ADDRESSABLE ADVERTISING AUDIENCE, AND MAY NOT MATCH TOTAL ACTIVE USERS. ◈ **COMPARABILITY ADVISORY:** BASE CHANGES. DATA MAY NOT BE COMPARABLE TO FIGURES PUBLISHED IN PREVIOUS REPORTS.

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	TWITTER'S REPORTED ADVERTISING REACH COMPARED TO TOTAL POPULATION AGED 13+	QUARTER-ON-QUARTER CHANGE IN TWITTER'S ADVERTISING REACH	PERCENTAGE OF ITS AD AUDIENCE THAT TWITTER REPORTS IS FEMALE*	PERCENTAGE OF ITS AD AUDIENCE THAT TWITTER REPORTS IS MALE*
1.27 MILLION	1.6%	+8.1%	46.3%	53.7%

SOURCE: EXTRAPOLATIONS OF DATA FROM TWITTER'S SELF-SERVICE ADVERTISING TOOLS (JANUARY 2020). FIGURES BASED ON MID-POINTS OF PUBLISHED RANGES. POPULATION DATA FROM THE U.N. ***NOTE:** TWITTER DOES NOT PUBLISH ADVERTISING AUDIENCE DATA FOR GENDERS OTHER THAN 'MALE' AND 'FEMALE'. GENDER SHARE FIGURES BASED ON AVAILABLE DATA. **ADVISORY:** DATA REPORTED BY TWITTER'S SELF-SERVICE ADVERTISING TOOLS ARE SUBJECT TO SIGNIFICANT FLUCTUATION. ◈ **COMPARABILITY ADVISORY:** SIGNIFICANT BASE CHANGES.

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*	LINKEDIN'S REPORTED ADVERTISING REACH COMPARED TO TOTAL POPULATION AGED 18+	QUARTER-ON-QUARTER CHANGE IN LINKEDIN'S ADVERTISING REACH	PERCENTAGE OF ITS AD AUDIENCE THAT LINKEDIN REPORTS IS FEMALE*	PERCENTAGE OF ITS AD AUDIENCE THAT LINKEDIN REPORTS IS MALE*
3.30 MILLION	4.7%	+3.1%	55.9%	44.1%

SOURCE: EXTRAPOLATIONS OF DATA FROM LINKEDIN'S SELF-SERVICE ADVERTISING TOOLS (JANUARY 2020). POPULATION DATA FROM THE U.N. ***NOTES:** LINKEDIN'S ADVERTISING AUDIENCE FIGURES ARE BASED ON TOTAL (REGISTERED) MEMBERS, NOT MONTHLY ACTIVE USERS, SO DATA ON THIS CHART MAY NOT BE COMPARABLE TO SIMILAR DATA POINTS FOR OTHER PLATFORMS. LINKEDIN DOES NOT REPORT ADVERTISING AUDIENCE FIGURES FOR GENDERS OTHER THAN 'MALE' OR 'FEMALE'. GENDER SHARE FIGURES HAVE BEEN EXTRAPOLATED FROM AVAILABLE DATA.

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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

SOURCE: GOOGLE TRENDS (ACCESSED JANUARY 2020); KEPIOS ANALYSIS. **NOTES:** GOOGLE DOES NOT PUBLISH SEARCH VOLUMES, BUT THE 'INDEX' COLUMN SHOWS THE RELATIVE VOLUME OF EACH QUERY COMPARED TO THE SEARCH VOLUME OF THE TOP QUERY (AN INDEX OF 50 MEANS THAT THE QUERY RECEIVED 50% OF THE SEARCH VOLUME OF THE TOP QUERY).

MOBILE USE

MOBILE CONNECTIONS BY TYPE

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

VIETNAM

NUMBER OF MOBILE CONNECTIONS (EXCLUDING IOT)	MOBILE CONNECTIONS AS A PERCENTAGE OF TOTAL POPULATION	PERCENTAGE OF MOBILE CONNECTIONS THAT ARE PRE-PAID	PERCENTAGE OF MOBILE CONNECTIONS THAT ARE POST-PAID	PERCENTAGE OF MOBILE CONNECTIONS THAT ARE BROADBAND (3G – 5G)
145.8 MILLION	150%	89%	11%	53%

SOURCE: GSMA INTELLIGENCE (JANUARY 2020, BASED ON DATA FOR Q4 2019). **NOTE:** PERCENTAGES vs. POPULATION MAY EXCEED 100% DUE TO INDIVIDUAL USE OF MULTIPLE CONNECTIONS. TOTAL GLOBAL CONNECTIONS FIGURE QUOTED HERE DOES NOT INCLUDE IOT CELLULAR CONNECTIONS. ◈ **COMPARABILITY ADVISORY:** BASE CHANGES. SOME FIGURES MAY NOT BE DIRECTLY COMPARABLE TO DATA IN OUR PREVIOUS REPORTS.

JAN 2020

MOBILE CONNECTIVITY INDEX

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

VIETNAM

OVERALL COUNTRY INDEX SCORE	MOBILE NETWORK INFRASTRUCTURE	AFFORDABILITY OF DEVICES & SERVICES	CONSUMER READINESS	AVAILABILITY OF RELEVANT CONTENT & SERVICES
64.98	59.84	64.05	73.24	63.51
OUT OF MAX. 100	OUT OF MAX. 100	OUT OF MAX. 100	OUT OF MAX. 100	OUT OF MAX. 100

SOURCE: GSMA MOBILE CONNECTIVITY INDEX (ACCESSED JANUARY 2020). THE MOBILE CONNECTIVITY INDEX MEASURES THE PERFORMANCE OF 165 COUNTRIES AGAINST KEY ENABLERS OF MOBILE INTERNET ADOPTION. COUNTRIES ARE SCORED WITHIN A RANGE OF 0 TO 100 ACROSS A NUMBER OF INDICATORS, WITH A HIGHER SCORE REPRESENTING STRONGER PERFORMANCE IN DELIVERING MOBILE INTERNET CONNECTIVITY. FOR MORE INFORMATION, VISIT WWW.MOBILECONNECTIVITYINDEX.COM

JAN 2020

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%
SOCIAL NETWORKING APPS	94%
ENTERTAINMENT OR VIDEO APPS	85%
GAMES (ANY TYPE)	58%
SHOPPING APPS	55%
MUSIC APPS	60%
MAP APPS	74%
BANKING APPS	36%
DATING AND FRIENDSHIP APPS	9.0%
HEALTH AND FITNESS APPS	20%

SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GLOBALWEBINDEX.COM FOR MORE DETAILS.

JAN 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

SOURCE: APP ANNIE (JANUARY 2020). COMBINED DATA FOR ANDROID PHONE AND IPHONE DEVICES.

JAN 2020

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

SOURCE: APP ANNIE (JANUARY 2020). COMBINED DATA FOR IOS AND GOOGLE PLAY STORES. **NOTE:** DOES NOT INCLUDE DATA FOR DOWNLOADS FROM THIRD-PARTY ANDROID STORES.

JAN 2020

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

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

SOURCE: APP ANNIE (JANUARY 2020). COMBINED DATA FOR GOOGLE PLAY AND IOS STORES. **NOTE:** DOES NOT INCLUDE DATA FOR DOWNLOADS FROM THIRD-PARTY ANDROID STORES.

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	SHARE OF WEB TRAFFIC ORIGINATING FROM APPLE IOS DEVICES	SHARE OF WEB TRAFFIC ORIGINATING FROM KAI OS DEVICES	SHARE OF WEB TRAFFIC ORIGINATING FROM SAMSUNG OS DEVICES*	SHARE OF WEB TRAFFIC ORIGINATING FROM OTHER OS DEVICES
61.2%	37.1%	[N/A]	0.3%	1.5%
DEC 2019 vs. DEC 2018: +3.3%	DEC 2019 vs. DEC 2018: -3.8%	DEC 2019 vs. DEC 2018: [N/A]	DEC 2019 vs. DEC 2018: +25%	DEC 2019 vs. DEC 2018: -26%

SOURCE: STATCOUNTER (ACCESSED JANUARY 2020). FIGURES REPRESENT EACH OPERATING SYSTEM'S SHARE OF WEB PAGES SERVED TO WEB BROWSERS ONLY. SHARE FIGURES ARE FOR DECEMBER 2019; ANNUAL CHANGE FIGURES COMPARE MONTHLY SHARE VALUES FOR DECEMBER 2019 TO DECEMBER 2018. ***NOTES:** FIGURES FOR SAMSUNG OS REFER ONLY TO THOSE DEVICES RUNNING OPERATING SYSTEMS DEVELOPED BY SAMSUNG (E.G. BADA AND TIZEN), AND DO NOT INCLUDE SAMSUNG DEVICES RUNNING ANDROID.

JAN 2020

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*	USE OR SCAN QR CODES	USE AN IMAGE SEARCH TOOL OR SERVICE	USE A MOBILE PHONE AS A TICKET OR BOARDING PASS	TRANSFER MONEY TO FRIENDS OR FAMILY
37%	37%	57%	15%	46%

SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GLOBALWEBINDEX.COM FOR MORE DETAILS.
***NOTE:** "CASTING" INCLUDES SCREEN MIRRORING.

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	HAS A CREDIT CARD	HAS A MOBILE MONEY ACCOUNT	MAKES ONLINE PURCHASES AND / OR PAYS BILLS ONLINE
30%	4.1%	3.5%	21%

PERCENTAGE OF WOMEN WITH A CREDIT CARD	PERCENTAGE OF MEN WITH A CREDIT CARD	PERCENTAGE OF WOMEN MAKING ONLINE TRANSACTIONS	PERCENTAGE OF MEN MAKING ONLINE TRANSACTIONS
3.7%	4.6%	21%	20%

SOURCE: WORLD BANK GLOBAL FINANCIAL INCLUSION DATA (LATEST DATA AVAILABLE IN JANUARY 2020).
NOTE: PERCENTAGES ARE OF ADULTS AGED 15 AND ABOVE, NOT OF TOTAL POPULATION.

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)	VISITED AN ONLINE RETAIL STORE ON THE WEB (ANY DEVICE)	PURCHASED A PRODUCT ONLINE (ANY DEVICE)	MADE AN ONLINE PURCHASE VIA A LAPTOP OR DESKTOP COMPUTER	MADE AN ONLINE PURCHASE VIA A MOBILE DEVICE
84%	75%	75%	35%	59%

SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GLOBALWEBINDEX.COM FOR MORE DETAILS.

JAN 2020

ECOMMERCE SPEND BY CATEGORY

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

VIETNAM

FASHION & BEAUTY	ELECTRONICS & PHYSICAL MEDIA	FOOD & PERSONAL CARE	FURNITURE & APPLIANCES
$717.0 MILLION	$716.0 MILLION	$517.0 MILLION	$526.0 MILLION

TOYS, DIY & HOBBIES	TRAVEL (INCLUDING ACCOMMODATION)*	DIGITAL MUSIC	VIDEO GAMES
$487.0 MILLION	$4.72 BILLION	$23.00 MILLION	$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 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.

ECOMMERCE GROWTH BY CATEGORY

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

VIETNAM

FASHION & BEAUTY	ELECTRONICS & PHYSICAL MEDIA	FOOD & PERSONAL CARE	FURNITURE & APPLIANCES
+17%	+13%	+24%	+19%

TOYS, DIY & HOBBIES	TRAVEL (INCLUDING ACCOMMODATION)*	DIGITAL MUSIC	VIDEO GAMES
+20%	+12%	+9.2%	+14%

SOURCES: STATISTA MARKET OUTLOOKS FOR E-COMMERCE, TRAVEL, MOBILITY, AND DIGITAL MEDIA (ACCESSED JANUARY 2020). FIGURES BASED ON COMPARISONS OF ESTIMATES OF FULL-YEAR CONSUMER SPEND IN 2019 AND 2018, EXCLUDING B2B SPEND. SEE STATISTA.COM/OUTLOOK/DIGITAL-MARKETS FOR MORE DETAILS. **NOTES:** DATA FOR DIGITAL MUSIC AND VIDEO GAMES INCLUDE STREAMING. ◈ **COMPARABILITY ADVISORY:** SOME BASE CHANGES. DATA MAY NOT BE DIRECTLY COMPARABLE TO FIGURES PUBLISHED IN PREVIOUS REPORTS.

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	VALUE OF THE MARKET FOR ONLINE CONSUMER GOODS PURCHASES (IN U.S. DOLLARS)	AVERAGE ANNUAL REVENUE PER ONLINE CONSUMER GOODS SHOPPER (ARPU) IN U.S. DOLLARS	ONLINE CONSUMER GOODS ARPU AS A PERCENTAGE OF GDP PER CAPITA (BOTH U.S. DOLLARS)
54.70 MILLION	$2.96 BILLION	$54	2.1%

SOURCES: STATISTA MARKET OUTLOOK (ACCESSED JANUARY 2020). SEE 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.

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	ANNUAL GROWTH IN THE VALUE OF B2C ECOMMERCE SPEND	B2C ECOMMERCE SPEND AS A PERCENTAGE OF TOTAL B2C RETAIL SPEND	AVERAGE ANNUAL ONLINE SPEND PER B2C CONSUMER	MOBILE'S SHARE OF B2C ECOMMERCE TRANSACTION VALUE
$6.00 BILLION	+20%	1.0%	$95	48%

SOURCE: PPRO, PAYMENTS AND E-COMMERCE REPORTS (2019 & 2020 EDITIONS).

JAN 2020

ECOMMERCE PURCHASES BY PAYMENT METHOD

PERCENTAGE OF ECOMMERCE TRANSACTIONS COMPLETED USING EACH METHOD OF PAYMENT

VIETNAM

CREDIT CARD	CASH	BANK TRANSFER	EWALLET	OTHER
37%	17%	30%	11%	6.0%

SOURCE: PPRO, PAYMENTS AND E-COMMERCE REPORTS (2019 & 2020 EDITIONS).

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*	TOTAL ANNUAL VALUE OF DIGITALLY ENABLED CONSUMER PAYMENTS	ANNUAL CHANGE IN THE VALUE OF DIGITALLY ENABLED CONSUMER PAYMENTS	AVERAGE TOTAL ANNUAL VALUE OF DIGITAL PAYMENT TRANSACTIONS PER DIGITAL PAYMENTS USER
51.10 MILLION	$8.52 BILLION	+20%	$167

SOURCE: STATISTA DIGITAL MARKET OUTLOOK FOR FINTECH (ACCESSED JANUARY 2020). FIGURES USE FULL-YEAR VALUES FOR 2019, WITH COMPARISONS TO EQUIVALENT 2018 DATA. SEE STATISTA.COM/OUTLOOK/DIGITAL-MARKETS FOR MORE DETAILS. ***NOTE:** IN THIS CONTEXT, "DIGITALLY ENABLED PAYMENTS" INCLUDE PAYMENTS FOR PRODUCTS AND SERVICES MADE OVER THE INTERNET, AND MOBILE PAYMENTS AT POINT-OF-SALE (POS) VIA SMARTPHONE APPS.

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*	TOTAL VALUE OF THE DIGITALLY ENABLED RIDE-HAILING MARKET	ANNUAL GROWTH IN THE TOTAL VALUE OF THE DIGITALLY ENABLED RIDE-HAILING MARKET	ANNUAL REVENUE PER USER OF DIGITALLY ENABLED RIDE-HAILING SERVICES
4.70 MILLION	$471.0 MILLION	+32%	$101

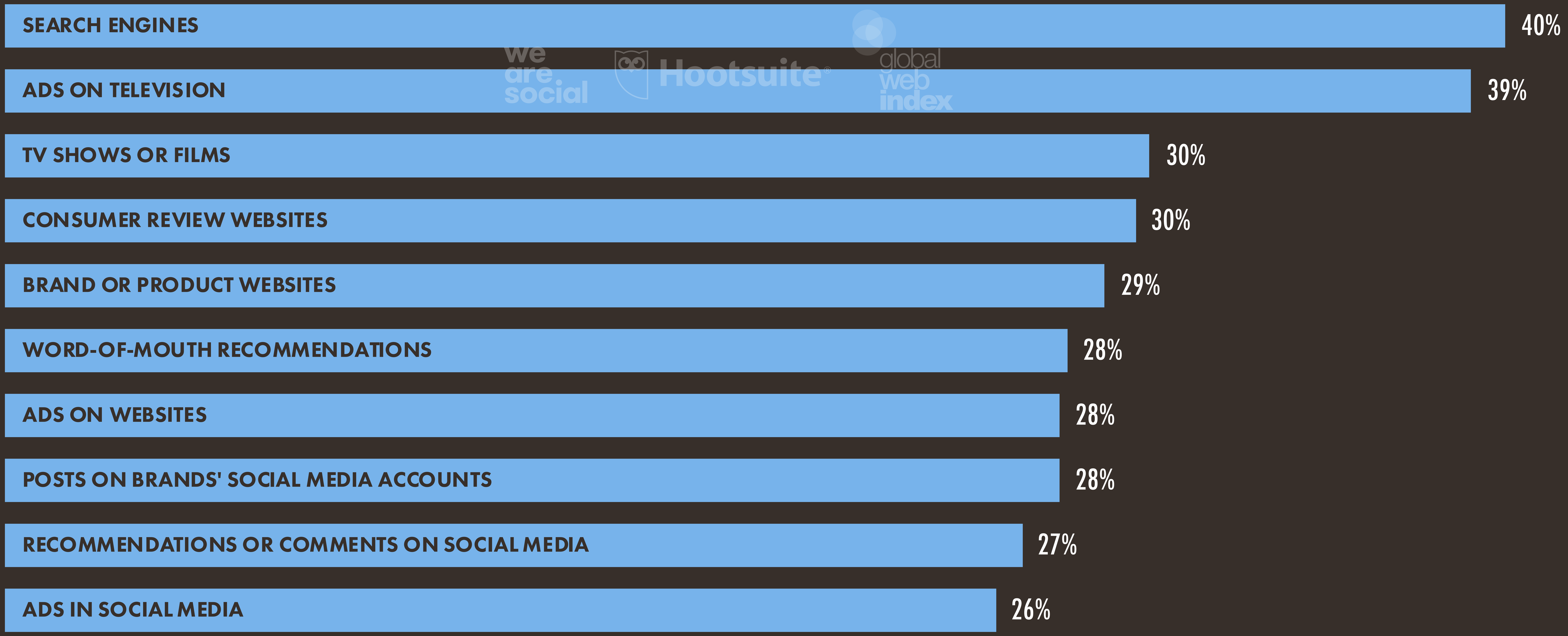
SOURCE: STATISTA MARKET OUTLOOK FOR ONLINE MOBILITY SERVICES (ACCESSED JANUARY 2020). FIGURES USE FULL-YEAR VALUES FOR 2019, WITH COMPARISONS TO EQUIVALENT 2018 DATA. SEE STATISTA.COM/OUTLOOK/MOBILITY-MARKETS FOR MORE DETAILS. ***NOTE:** IN THIS CONTEXT, "DIGITALLY ENABLED RIDE-HAILING SERVICES" INCLUDE TRANSPORTATION NETWORK COMPANIES THAT OFFER RIDES IN PRIVATE VEHICLES (E.G. UBER, DIDI, GRAB), RIDE-POOLING SERVICES, AND REGULAR TAXI SERVICES BOOKED ONLINE OR THROUGH A SMARTPHONE APP.

JAN 2020

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



SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GLOBALWEBINDEX.COM FOR MORE DETAILS.

JAN 2020

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

SOURCE: GOOGLE TRENDS (ACCESSED JANUARY 2020). **NOTES:** GOOGLE DOES NOT PUBLISH SEARCH VOLUMES, BUT THE "INDEX" COLUMN SHOWS RELATIVE VOLUMES FOR EACH QUERY COMPARED TO SEARCH VOLUMES FOR THE TOP QUERY (AN INDEX OF 50 MEANS THAT THE QUERY RECEIVED 50% OF THE SEARCH VOLUME OF THE TOP QUERY).

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

SPEND ON DIGITAL SEARCH ADS IN 2019

$118.0 MILLION

SPEND ON SOCIAL MEDIA ADS IN 2019

$50.00 MILLION

SPEND ON DIGITAL BANNER ADS IN 2019

$54.00 MILLION

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 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.

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	YEAR-ON-YEAR CHANGE IN DIGITAL SEARCH AD SPEND	YEAR-ON-YEAR CHANGE IN SOCIAL MEDIA AD SPEND
+9.2%	+9.2%	+17%

YEAR-ON-YEAR CHANGE IN DIGITAL BANNER AD SPEND	YEAR-ON-YEAR CHANGE IN DIGITAL VIDEO AD SPEND	YEAR-ON-YEAR CHANGE IN DIGITAL CLASSIFIED AD SPEND
+12%	+7.7%	+1.3%

SOURCE: STATISTA MARKET OUTLOOK FOR DIGITAL ADVERTISING (ACCESSED JANUARY 2020). FIGURES COMPARE FULL-YEAR DIGITAL ADVERTISING SPEND IN 2019 TO EQUIVALENT DATA FOR 2018. SEE STATISTA.COM/OUTLOOK/DIGITAL-MARKETS FOR MORE DETAILS. **NOTES:** 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 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
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96% OF THE GLOBAL INTERNET POPULATION

OVER 150 COUNTRIES AND REGIONS

98% OF WORLDWIDE ECONOMIC POWER

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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.

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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

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WEB INTELLIGENCE

APP INTELLIGENCE

GLOBAL COVERAGE

GRANULAR ANALYSIS

Learn more about SimilarWeb at https://www.similarweb.com

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Learn more about Locowise at https://locowise.com

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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