DIGITAL IN 2018 IN VIETNAM

ESSENTIAL INSIGHTS INTO INTERNET, SOCIAL MEDIA, MOBILE, AND ECOMMERCE USE ACROSS VIETNAM

we are social

Hootsuite™

GLOBAL OVERVIEW

JAN 2018

DIGITAL AROUND THE WORLD IN 2018

KEY STATISTICAL INDICATORS FOR THE WORLD'S INTERNET, MOBILE, AND SOCIAL MEDIA USERS

TOTAL POPULATION	INTERNET USERS	ACTIVE SOCIAL MEDIA USERS	UNIQUE MOBILE USERS	ACTIVE MOBILE SOCIAL USERS
7.593 BILLION	4.021 BILLION	3.196 BILLION	5.135 BILLION	2.958 BILLION
URBANISATION: 55%	PENETRATION: 53%	PENETRATION: 42%	PENETRATION: 68%	PENETRATION: 39%

SOURCES: POPULATION: UNITED NATIONS; U.S. CENSUS BUREAU; INTERNET: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; MIDEASTMEDIA.ORG; FACEBOOK; GOVERNMENT OFFICIALS; REGULATORY AUTHORITIES; REPUTABLE MEDIA; SOCIAL MEDIA AND MOBILE SOCIAL MEDIA: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; DING; TECHRASA; SIMILARWEB; KEPIOS ANALYSIS; MOBILE: GSMA INTELLIGENCE; GOOGLE; ERICSSON; KEPIOS ANALYSIS. **NOTE:** PENETRATION FIGURES ARE FOR TOTAL POPULATION (ALL AGES).

JAN 2018

ANNUAL GROWTH

YEAR-ON-YEAR CHANGE IN KEY STATISTICAL INDICATORS

INTERNET USERS	ACTIVE SOCIAL MEDIA USERS	UNIQUE MOBILE USERS	ACTIVE MOBILE SOCIAL USERS
+7%	**+13%**	**+4%**	**+14%**
SINCE JAN 2017	SINCE JAN 2017	SINCE JAN 2017	SINCE JAN 2017
+248 MILLION	**+362 MILLION**	**+218 MILLION**	**+360 MILLION**

SOURCES: POPULATION: UNITED NATIONS; U.S. CENSUS BUREAU; INTERNET: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; MIDEASTMEDIA.ORG; FACEBOOK; GOVERNMENT OFFICIALS; REGULATORY AUTHORITIES; REPUTABLE MEDIA; SOCIAL MEDIA AND MOBILE SOCIAL MEDIA: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; DING; TECHRASA; SIMILARWEB; KEPIOS ANALYSIS; MOBILE: GSMA INTELLIGENCE; GOOGLE; ERICSSON; KEPIOS ANALYSIS. GROWTH DATA: WE ARE SOCIAL & HOOTSUITE'S *DIGITAL IN 2017* REPORT.

JAN
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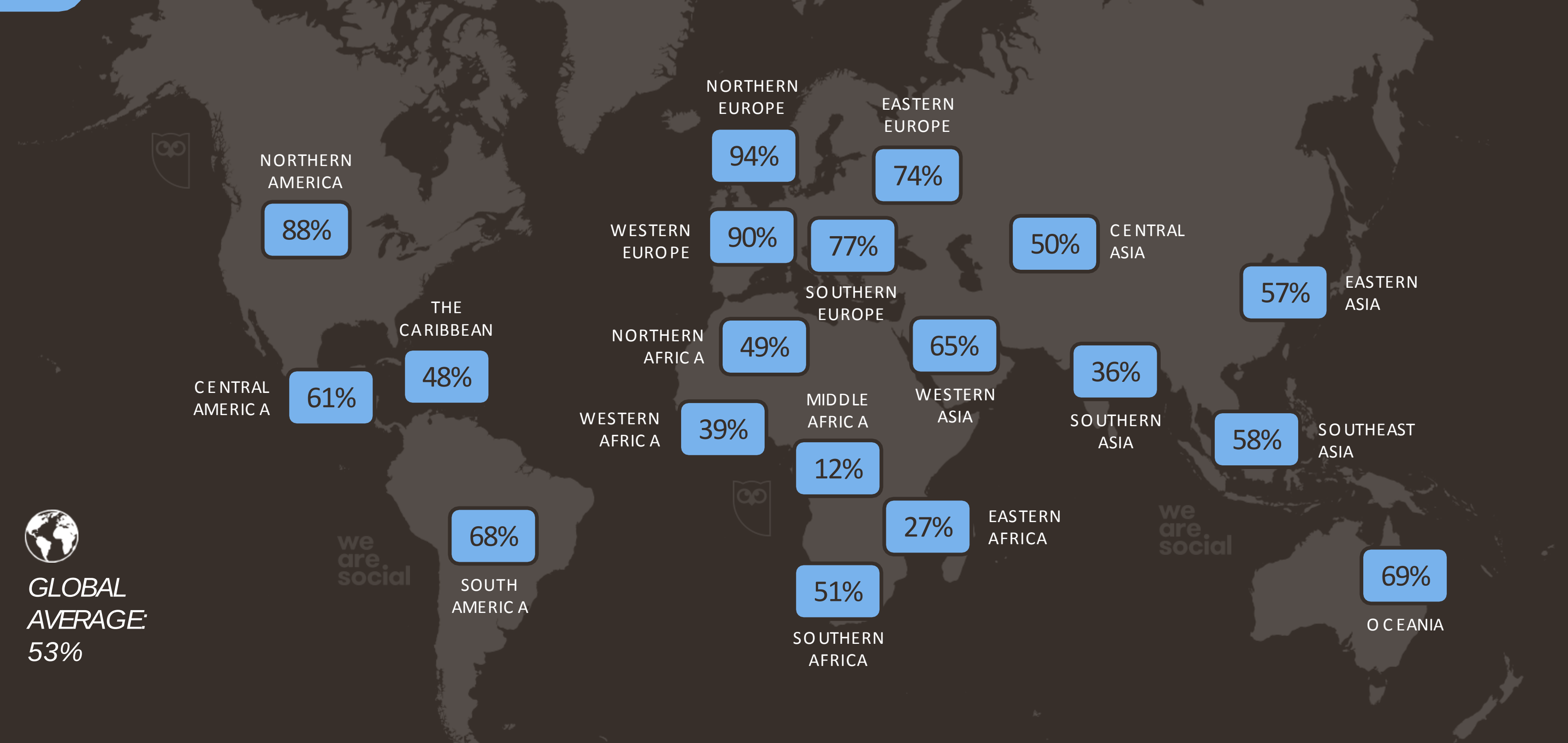
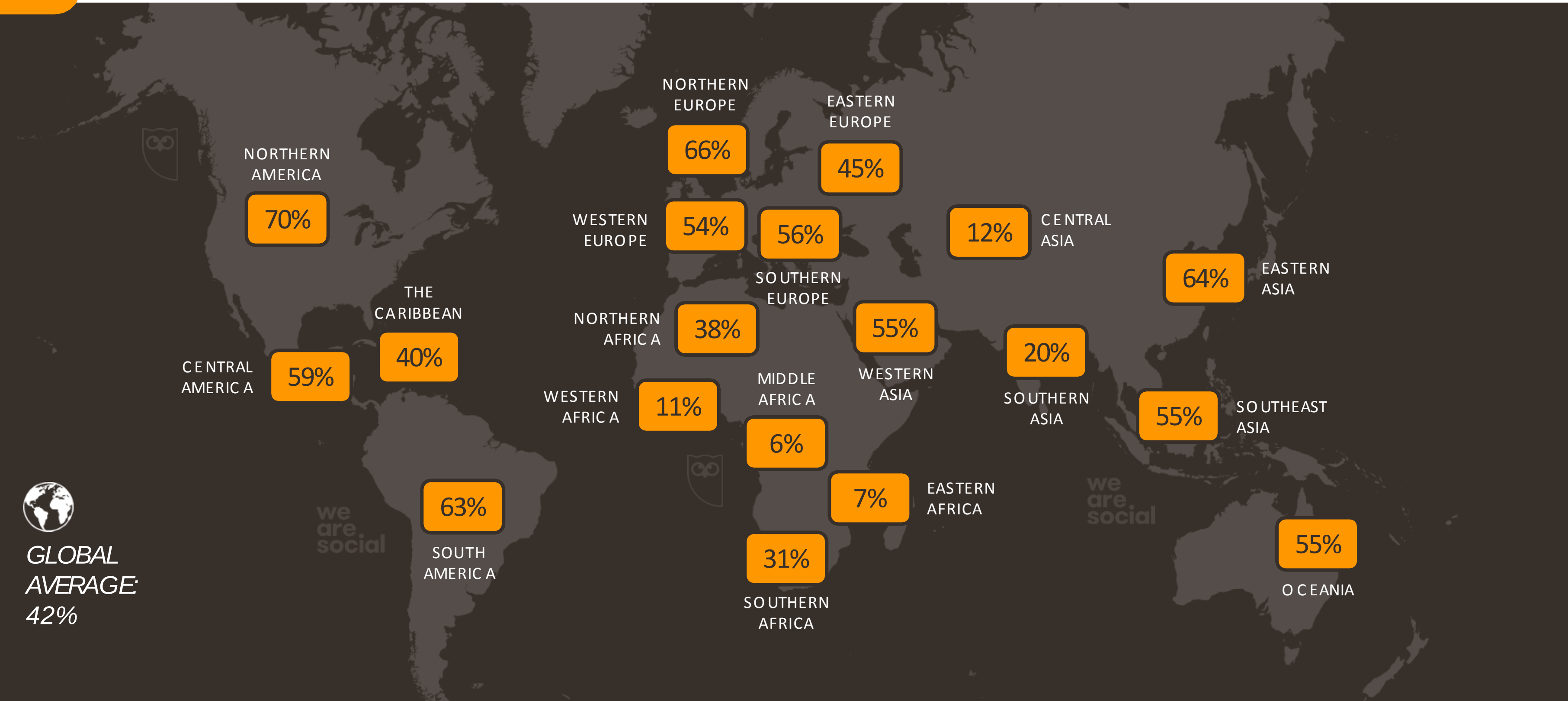
INTERNET PENETRATION BY REGION



SOURCES: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; MIDEASTMEDIA.ORG; FACEBOOK; GOVERNMENT OFFICIALS; REGULATORY AUTHORITIES; REPUTABLE MEDIA. **NOTE:** PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

SOCIAL MEDIA PENETRATION BY REGION



SOURCES: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; DING; TECHRASA; SIMILARWEB; KEPIOS ANALYSIS.
NOTE: PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

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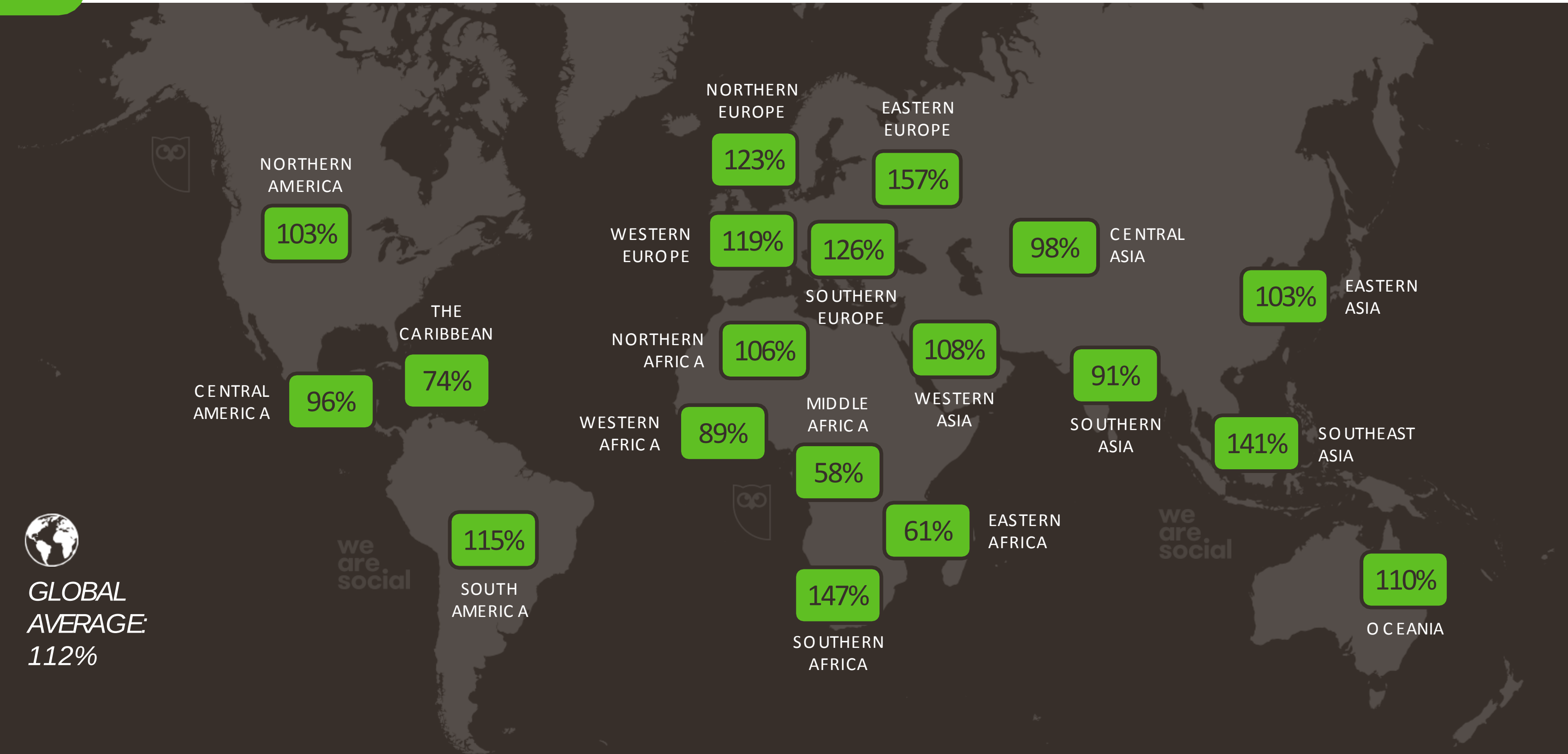
MOBILE CONNECTIVITY BY REGION

NOTE: NOT UNIQUE USERS

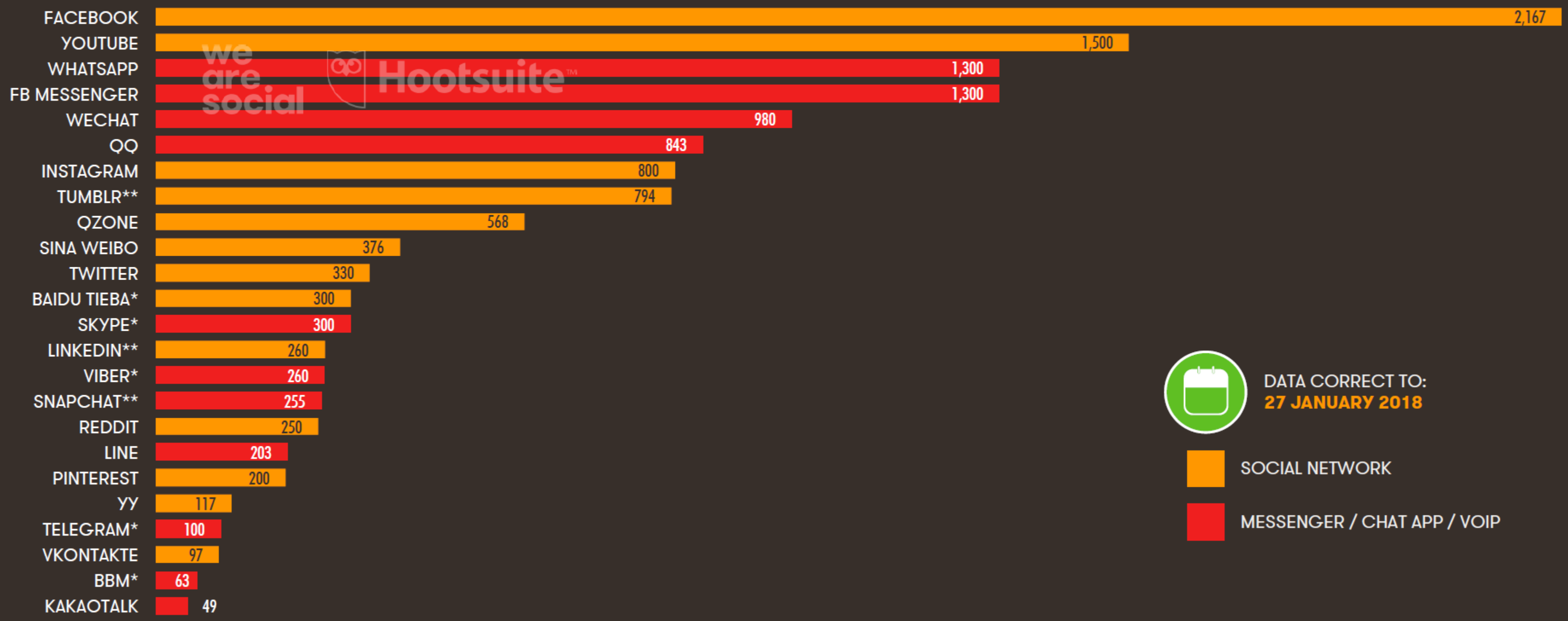


SOURCES: GSMA INTELLIGENCE, Q4 2017. NOTE: PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

JAN 2018

ACTIVE USERS OF KEY GLOBAL SOCIAL PLATFORMS

BASED ON THE MOST RECENTLY PUBLISHED MONTHLY ACTIVE USER ACCOUNTS FOR EACH PLATFORM, IN MILLIONS



DATA CORRECT TO: **27 JANUARY 2018**

SOCIAL NETWORK

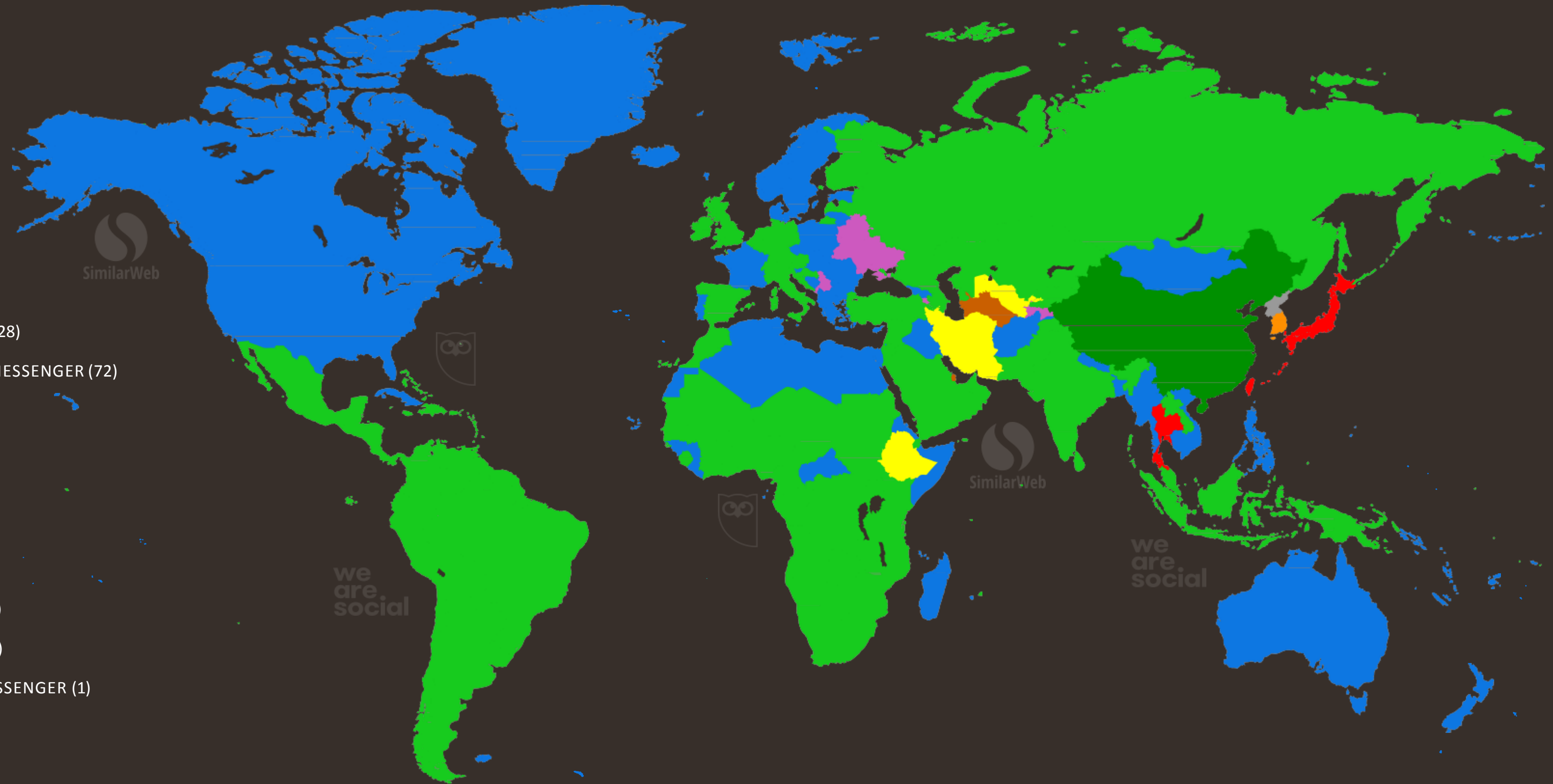
MESSENGER / CHAT APP / VOIP

SOURCES: KEPIOS ANALYSIS; LATEST COMPANY EARNINGS RELEASES, PRESS RELEASES OR MEDIA STATEMENTS; REPORTS IN REPUTABLE MEDIA; ALL AS OF JANUARY 2018. ***ADVISORY:** PLATFORMS IDENTIFIED BY (*) HAVE NOT PUBLISHED UPDATED USER FIGURES IN THE PAST 12 MONTHS, SO FIGURES MAY BE LESS RELIABLE. ****NOTES:** THESE PLATFORMS DO NOT PUBLISH MAU DATA. TUMBLR FIGURE IS FOR MONTHLY UNIQUE VISITORS IN DEC 2017, VIA SIMILARWEB. SNAPCHAT FIGURE VIA TECHCRUNCH, JUN 2017. LINKEDIN DATA VIA FORTUNE / APPTOPIA, APR 2017.

JAN 2018

TOP MESSENGER APPS BY COUNTRY

BASED ON THE GOOGLE PLAY STORE RANK FOR EACH COUNTRY IN DECEMBER 2017



- WHATSAPP (128)
- FACEBOOK MESSENGER (72)
- VIBER (10)
- WECHAT (3)
- LINE (3)
- TELEGRAM (3)
- IMO (3)
- KAKAOTALK (1)
- HANGOUTS (1)
- ANDROID MESSENGER (1)
- NO DATA (14)

SOURCE: SIMILARWEB, JANUARY 2018, BASED ON THE GOOGLE PLAY APP STORE RANK FOR DECEMBER 2017. FIGURES IN PARENTHESES IN THE LEGEND REPRESENT THE NUMBER OF COUNTRIES / TERRITORIES IN WHICH EACH PLATFORM IS THE TOP-RANKED MESSENGER APP.

WE ARE SOCIAL'S ANALYSIS: DIGITAL IN 2018

With more than 4 billion people using the internet for an average of 6 hours each per day, digital has become an essential part of everyday life for most of us. We're using that connectivity in almost every aspect of our lives, whether it's chatting with friends, playing games, researching products, tracking our health, or even finding love. As a result, brands need to evolve beyond today's siloed approach to digital, and build seamless digital integration into everything they do – just as our audiences already have. Here are some tips to help with that:

Start with what people really need and want, and not just what the technology can do

Focus on creating mutual value at every opportunity, instead of simply 'selling more stuff'

Make it easy for people to buy online as soon as they're ready, wherever they are

Harness digital tools to keep the conversation going, even after you make a successful sale

To learn more about what these Digital, Social and Mobile trends mean for your brand, click here to download our Think Forward report.

HOOTSUITE'S PERSPECTIVE: 2018 SOCIAL TRENDS

The evolution of social ROI. It's the end of the road for vanity metrics. Expect to see more organisations evolve their metrics as they look to quantify social's contribution to tangible business challenges such as lowering costs, increasing revenue, mitigating risk, and attracting talent.

Mobile fuels the growth of social TV. In 2018, social networks will encourage brands to become broadcasters as mobile video and social-TV content take the spotlight. We advise caution here as the metrics that bump the stock price of social networks—such as mobile video views—might not help your organisation achieve your own business outcomes.

Trust declines, while peer influence rises. From Trump's tumultuous triumph over traditional media to the fake news phenomenon, we saw a shift in media culture in 2017. It's clear we're moving away from trusting traditional institutions—and moving towards smaller spheres of influence where customer communities and engaged employees matter more than ever.

Humans, meet AI. The machines have risen. And marketers have discovered they can be delightfully useful. But while marketers rush ahead with chatbots and AI-generated content, it's still unclear whether customers will value these human-less engagements.

The promise (and reality) of social data. From tying together analytics systems to CRM integrations, marketers underestimated the complexity of social data initiatives. Organisations must recalculate the effort and resources needed to turn social data into a true—and unified—source of customer insights.

Click here to download our 2018 Social Media Trends Toolkit to align your strategy with the year's key social network and digital trends.

VIETNAM

JAN 2018

DIGITAL IN VIETNAM

A SNAPSHOT OF THE COUNTRY'S KEY DIGITAL STATISTICAL INDICATORS

TOTAL POPULATION	INTERNET USERS	ACTIVE SOCIAL MEDIA USERS	UNIQUE MOBILE USERS	ACTIVE MOBILE SOCIAL USERS
96.02 MILLION	64.00 MILLION	55.00 MILLION	70.03 MILLION	50.00 MILLION
URBANISATION: 35%	PENETRATION: 67%	PENETRATION: 57%	PENETRATION: 73%	PENETRATION: 52%

SOURCES: POPULATION: UNITED NATIONS; U.S. CENSUS BUREAU; INTERNET: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; MIDEASTMEDIA.ORG; FACEBOOK; GOVERNMENT OFFICIALS; REGULATORY AUTHORITIES; REPUTABLE MEDIA; SOCIAL MEDIA AND MOBILE SOCIAL MEDIA: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; DING; TECHRASA; SIMILARWEB; KEPIOS ANALYSIS; MOBILE: GSMA INTELLIGENCE; GOOGLE; ERICSSON; KEPIOS ANALYSIS. NOTE: PENETRATION FIGURES ARE FOR TOTAL POPULATION (ALL AGES).

JAN 2018

ANNUAL DIGITAL GROWTH

YEAR-ON-YEAR CHANGE IN KEY STATISTICAL INDICATORS

INTERNET USERS	ACTIVE SOCIAL MEDIA USERS	UNIQUE MOBILE USERS	ACTIVE MOBILE SOCIAL USERS
+28%	+20%	+0.1%	+22%
SINCE JAN 2017	SINCE JAN 2017	SINCE JAN 2017	SINCE JAN 2017
+14 MILLION	+9 MILLION	+79 THOUSAND	+9 MILLION

SOURCES: POPULATION: UNITED NATIONS; U.S. CENSUS BUREAU; INTERNET: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; MIDEASTMEDIA.ORG; FACEBOOK; GOVERNMENT OFFICIALS; REGULATORY AUTHORITIES; REPUTABLE MEDIA; SOCIAL MEDIA AND MOBILE SOCIAL MEDIA: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; DING; TECHRASA; SIMILARWEB; KEPIOS ANALYSIS; MOBILE: GSMA INTELLIGENCE; GOOGLE; ERICSSON; KEPIOS ANALYSIS. GROWTH DATA: WE ARE SOCIAL & HOOTSUITE'S *DIGITAL IN 2017* REPORT.

JAN 2018

POPULATION & ECONOMIC INDICATORS

ESSENTIAL DEMOGRAPHICS AND KEY ECONOMIC INDICATORS

TOTAL POPULATION	FEMALE POPULATION	MALE POPULATION	ANNUAL CHANGE IN POPULATION SIZE	MEDIAN AGE
96.02 MILLION	50.5%	49.5%	+1.0%	30.9 YEARS OLD

POPULATION LIVING IN URBAN AREAS	GDP PER CAPITA	LITERACY (TOTAL)	FEMALE LITERACY	MALE LITERACY
35%	$6,435	95%	93%	96%

SOURCES: UNITED NATIONS; US CENSUS BUREAU; UNESCO; WORLD BANK, IMF; CIA WORLD FACTBOOK.

JAN 2018

DEVICE USAGE

PERCENTAGE OF THE ADULT POPULATION* THAT CURRENTLY USES EACH KIND OF DEVICE [SURVEY-BASED]

MOBILE PHONE (ANY TYPE)	SMART PHONE	LAPTOP OR DESKTOP COMPUTER	TABLET COMPUTER
97%	72%	43%	13%

TELEVISION (ANY KIND)	DEVICE FOR STREAMING INTERNET CONTENT TO TV	E-READER DEVICE	WEARABLE TECH DEVICE
97%	5%	[N/A]	1%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. ***NOTE:** DATA REPRESENTS ADULT RESPONDENTS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS.

TIME SPENT WITH MEDIA

SURVEY-BASED DATA: FIGURES REPRESENT RESPONDENTS' SELF-REPORTED ACTIVITY

AVERAGE DAILY TIME SPENT USING THE INTERNET VIA ANY DEVICE	AVERAGE DAILY TIME SPENT USING SOCIAL MEDIA VIA ANY DEVICE	AVERAGE DAILY TV VIEWING TIME (BROADCAST, STREAMING AND VIDEO ON DEMAND)	AVERAGE DAILY TIME SPENT LISTENING TO STREAMING MUSIC
6H 52M	2H 37M	2H 43M	1H 21M

SOURCE: GLOBALWEBINDEX, Q2 &Q3 2017. BASED ON A SURVEY OF INTERNET USERS AGED 16-64.
NOTE: TIME SPENT USING SOCIAL MEDIA INCLUDES SOCIAL NETWORKS AS WELL AS MESSENGERS / CHAT APPS.

JAN 2018

ATTITUDES TOWARDS DIGITAL

HOW INTERNET USERS* PERCEIVE THE ROLE OF TECHNOLOGY, AND THEIR PERSPECTIVE ON PRIVACY ISSUES

BELIEVE THAT NEW TECHNOLOGIES OFFER MORE OPPORTUNITIES THAN RISKS	PREFER TO COMPLETE TASKS DIGITALLY WHENEVER POSSIBLE	BELIEVE DATA PRIVACY AND PROTECTION ARE VERY IMPORTANT	DELETE COOKIES FROM INTERNET BROWSER TO PROTECT PRIVACY	USE AN AD-BLOCKING TOOL TO STOP ADVERTS BEING DISPLAYED
61%	63%	76%	45%	38%

SOURCES: GOOGLE CONSUMER BAROMETER, JANUARY 2018; GLOBALWEBINDEX, Q2 &Q3, 2017. **NOTES:** GOOGLE FIGURES BASED ON A SURVEY OF ADULT INTERNET USERS. SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON METHODOLOGY AND AUDIENCE DEFINITIONS. GLOBALWEBINDEX FIGURES BASED ON A SURVEY OF INTERNET USERS AGED 16-64. ***NOTE:** THESE FIGURES ONLY REPRESENT THE ATTITUDES AND ACTIVITIES OF INTERNET USERS.

JAN 2018

INTERNET USE

BASED ON REPORTED INTERNET USER DATA, AND USER-CLAIMED MOBILE INTERNET USE

TOTAL NUMBER OF ACTIVE INTERNET USERS	INTERNET USERS AS A PERCENTAGE OF THE TOTAL POPULATION	TOTAL NUMBER OF ACTIVE MOBILE INTERNET USERS	MOBILE INTERNET USERS AS A PERCENTAGE OF THE TOTAL POPULATION
64.00 MILLION	67%	61.73 MILLION	64%

SOURCES: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; MIDEASTMEDIA.ORG; FACEBOOK; GOVERNMENT OFFICIALS; REGULATORY AUTHORITIES; REPUTABLE MEDIA; GLOBALWEBINDEX, Q2 &Q3 2017. NOTES: GLOBALWEBINDEX DATA IS BASED ON A SURVEY OF INTERNET USERS AGED 16-64, BUT DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE. PENETRATION FIGURES BASED ON POPULATION DATA FROM THE UNITED NATIONS AND THE U.S. CENSUS BUREAU.

JAN 2018

INTERNET USERS: DIFFERENT PERSPECTIVES

REPORTS OF THE TOTAL NUMBER OF INTERNET USERS FROM DIFFERENT DATA PROVIDERS

INTERNET WORLD STATS	ITU (INTERNATIONAL TELECOMMUNICATION UNION)	INTERNET LIVE STATS	CIA WORLD FACTBOOK
64.00 MILLION	44.65 MILLION	49.06 MILLION	50.60 MILLION

SOURCES: INTERNETWORLDSTATS; INTERNATIONAL TELECOMMUNICATION UNION (ITU); INTERNETLIVESTATS; CIA WORLD FACTBOOK; ALL LATEST REPORTED FIGURES AS OF JANUARY 2018.

JAN 2018

FREQUENCY OF INTERNET USE

HOW OFTEN INTERNET USERS ACCESS THE INTERNET FOR PERSONAL REASONS (ANY DEVICE)

EVERY DAY	AT LEAST ONCE PER WEEK	AT LEAST ONCE PER MONTH	LESS THAN ONCE PER MONTH
1	7	31	?
94%	6%	0%	0%

JAN 2018

INTERNET CONNECTIONS: SPEED &DEVICES

AVERAGE INTERNET CONNECTION SPEEDS, AND THE DEVICE THAT PEOPLE USE MOST OFTEN TO ACCESS THE INTERNET

AVERAGE INTERNET SPEED VIA FIXED CONNECTIONS	AVERAGE INTERNET SPEED VIA MOBILE CONNECTIONS	ACCESS THE INTERNET MOST OFTEN VIA A COMPUTER OR TABLET	ACCESS EQUALLY VIA A SMARTPHONE AND COMPUTER OR TABLET	ACCESS THE INTERNET MOST OFTEN VIA A SMARTPHONE
24.77 MBPS	20.33 MBPS	9%	16%	68%

SOURCES: OOKLA SPEEDTEST, NOVEMBER 2017; GOOGLE CONSUMER BAROMETER, JANUARY 2018. GOOGLE'S FIGURES BASED ON RESPONSES TO A SURVEY.
NOTES: DATA REPRESENTS ADULT RESPONDENTS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. DEVICE USAGE PERCENTAGES MAY NOT SUM TO 100% DUE TO "DON'T KNOW" OR INCOMPLETE ANSWERS.

JAN 2018

SHARE OF WEB TRAFFIC BY DEVICE

BASED ON EACH DEVICE'S SHARE OF ALL WEB PAGES SERVED TO WEB BROWSERS

LAPTOPS & DESKTOPS	MOBILE PHONES	TABLET DEVICES	OTHER DEVICES
73%	24%	3%	[N/A]
YEAR-ON-YEAR CHANGE: +23%	YEAR-ON-YEAR CHANGE: -31%	YEAR-ON-YEAR CHANGE: -53%	YEAR-ON-YEAR CHANGE: [N/A]

SOURCES: STATCOUNTER, JANUARY 2018, AND STATCOUNTER, JANUARY 2017.

JAN 2018

SIMILARWEB'S RANKING OF TOP WEBSITES

RANKINGS BASED ON AVERAGE MONTHLY TRAFFIC TO EACH WEBSITE IN Q4 2017

#	WEBSITE	CATEGORY	MONTHLY TRAFFIC	TIME PER VISIT	PAGES PER VISIT
01	GOOGLE.COM.VN	SEARCH	375,300,000	12M 26S	6.8
02	FACEBOOK.COM	SOCIAL	351,400,000	25M 04S	21.7
03	YOUTUBE.COM	TV & VIDEO	329,900,000	27M 15S	11.9
04	GOOGLE.COM	SEARCH	323,200,000	13M 24S	15.3
05	VNEXPRESS.NET	NEWS & MEDIA	73,400,000	9M 07S	4.2
06	ZING.VN	SOCIAL	61,900,000	14M 47S	6.6
07	YAHOO.COM	NEWS & MEDIA	41,200,000	5M 49S	4.6
08	COCCOC.COM	SEARCH	37,500,000	6M 54S	2.6
09	NEWS.ZING.VN	NEWS & MEDIA	32,400,000	7M 11S	3.6
10	KENH14.VN	NEWS & MEDIA	32,100,000	7M 31S	4.8

SOURCE: SIMILARWEB, JANUARY 2018, BASED ON AVERAGE MONTHLY DATA FOR Q4 2017. **NOTES:** MONTHLY TRAFFIC REPRESENTS TOTAL VISITS TO EACH SITE, NOT UNIQUE VISITORS. DATA FOR SOME COUNTRIES REPRESENTS DESKTOP TRAFFIC, WHILST OTHERS REPRESENTS TRAFFIC FROM BOTH DESKTOP AND MOBILE DEVICES. **ADVISORY:** SOME WEBSITES REFERENCED ON THIS SLIDE MAY CONTAIN ADULT CONTENT, OR CONTENT THAT IS UNSUITABLE FOR THE WORKPLACE. PLEASE USE CAUTION WHEN VISITING UNKNOWN WEBSITES.

JAN 2018

ALEXA'S RANKING OF TOP WEBSITES

RANKINGS BASED ON THE NUMBER OF VISITORS TO EACH SITE, AND THE NUMBER OF PAGES VIEWED ON EACH SITE PER VISIT

#	WEBSITE	TIME	PAGES
01	COCCOC.COM	1M 04S	1.26
02	GOOGLE.COM.VN	6M 39S	10.32
03	YOUTUBE.COM	8M 18S	4.79
04	GOOGLE.COM	7M 32S	8.56
05	DKN.TV	3M 53S	2.26
06	FACEBOOK.COM	10M 21S	4.00
07	VTV.VN	2M 10S	1.96
08	ZING.VN	6M 54S	4.07
09	VNEXPRESS.NET	8M 25S	4.43
10	TAIMIENPHI.VN	2M 12S	1.80

#	WEBSITE	TIME	PAGES
11	24H.COM.VN	7M 25S	5.64
12	KENH14.VN	7M 35S	4.78
13	DANTRI.COM.VN	6M 04S	3.65
14	THETHAO247.VN	3M 52S	3.40
15	PHIMMOI.NET	4M 13S	4.49
16	YAHOO.COM	4M 02S	3.61
17	LAZADA.VN	7M 29S	5.55
18	MANGVIECLAM.COM	2M 22S	1.70
19	BAOMOI.COM	2M 52S	2.36
20	VIETNAMNET.VN	4M 43S	2.92

SOURCE: ALEXA, JANUARY 2018. **NOTES:** 'TIME' REPRESENTS TIME SPENT ON SITE PER DAY. 'PAGES' REPRESENTS NUMBER OF PAGE VIEWS PER DAY. ALEXA USES A COMBINATION OF AVERAGE DAILY VISITORS AND PAGE VIEWS OVER A ONE-MONTH PERIOD TO CALCULATE ITS RANKING. RANKINGS ON THIS SLIDE ARE BASED ON THE MONTH TO 16 JANUARY 2018. **ADVISORY:** SOME WEBSITES REFERENCED ON THIS SLIDE MAY CONTAIN ADULT CONTENT, OR CONTENT THAT IS UNSUITABLE FOR THE WORKPLACE. PLEASE USE CAUTION WHEN VISITING UNKNOWN WEBSITES.

JAN 2018

WEEKLY ONLINE ACTIVITIES BY DEVICE

PERCENTAGE OF THE TOTAL POPULATION* ENGAGING IN EACH ACTIVITY AT LEAST ONCE PER WEEK [SURVEY-BASED]

USE A SEARCH ENGINE	VISIT A SOCIAL NETWORK	PLAY GAMES	WATCH VIDEOS	LOOK FOR PRODUCT INFORMATION
SMARTPHONE: 44%	SMARTPHONE: 52%	SMARTPHONE: 24%	SMARTPHONE: 53%	SMARTPHONE: 14%
COMPUTER: 19%	COMPUTER: 21%	COMPUTER: 9%	COMPUTER: 21%	COMPUTER: 6%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. *NOTES: DATA BASED ON SURVEY RESPONSES FROM ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE.

JAN 2018

TOP GOOGLE SEARCH QUERIES IN 2017

RANKING OF THE TOP SEARCH TERMS ENTERED INTO GOOGLE'S SEARCH ENGINE THROUGHOUT 2017

#	QUERY	INDEX
01	PHIM	100
02	FACEBOOK	60
03	BAO	41
04	XSMB	37
05	YOUTUBE	32
06	GOOGLE	30
07	BONG DA	28
08	NHAC	25
09	SO XO	23
10	24H	22

#	QUERY	INDEX
11	XSMN	21
12	DỊCH	20
13	XỔ SỐ	15
14	TIN TUC	15
15	GAME	14
16	GMAIL	13
17	XEM PHIM	12
18	FB	11
19	ZING	11
20	GOOGLE DỊCH	11

SOURCE: GOOGLE TRENDS, JANUARY 2018. **NOTES:** GOOGLE DOES NOT PUBLISH SEARCH VOLUMES, BUT THE 'INDEX' COLUMN SHOWS RELATIVE VOLUME FOR EACH QUERY COMPARED TO THE SEARCH VOLUME FOR THE TOP QUERY (AN INDEX OF 50 MEANS THAT THE QUERY RECEIVED 50% OF THE SEARCH VOLUME OF THE TOP QUERY).

JAN 2018

FREQUENCY OF WATCHING ONLINE VIDEO

HOW OFTEN INTERNET USERS WATCH ONLINE VIDEOS (ANY DEVICE)

WATCH ONLINE VIDEOS EVERY DAY	WATCH ONLINE VIDEOS EVERY WEEK	WATCH ONLINE VIDEOS EVERY MONTH	WATCH ONLINE VIDEOS LESS THAN ONCE A MONTH	NEVER WATCH ONLINE VIDEOS
1	7	31	365	X
71%	22%	3%	1%	2%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. **NOTE:** DATA REPRESENTS ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS.

JAN 2018

HOW INTERNET USERS WATCH TELEVISION

COMPARISON OF THE METHODS AND DEVICES USED FOR ACCESSING AND DISPLAYING 'TELEVISION' CONTENT

REGULAR TELEVISION ON A TV SET	RECORDED CONTENT ON A TV SET	CATCH-UP / ON-DEMAND SERVICE ON TV SET	ONLINE CONTENT STREAMED ON A TV SET	ONLINE CONTENT STREAMED ON ANOTHER DEVICE
95%	7%	16%	11%	23%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. **NOTE:** DATA REPRESENTS ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS.

SOCIAL MEDIA USE

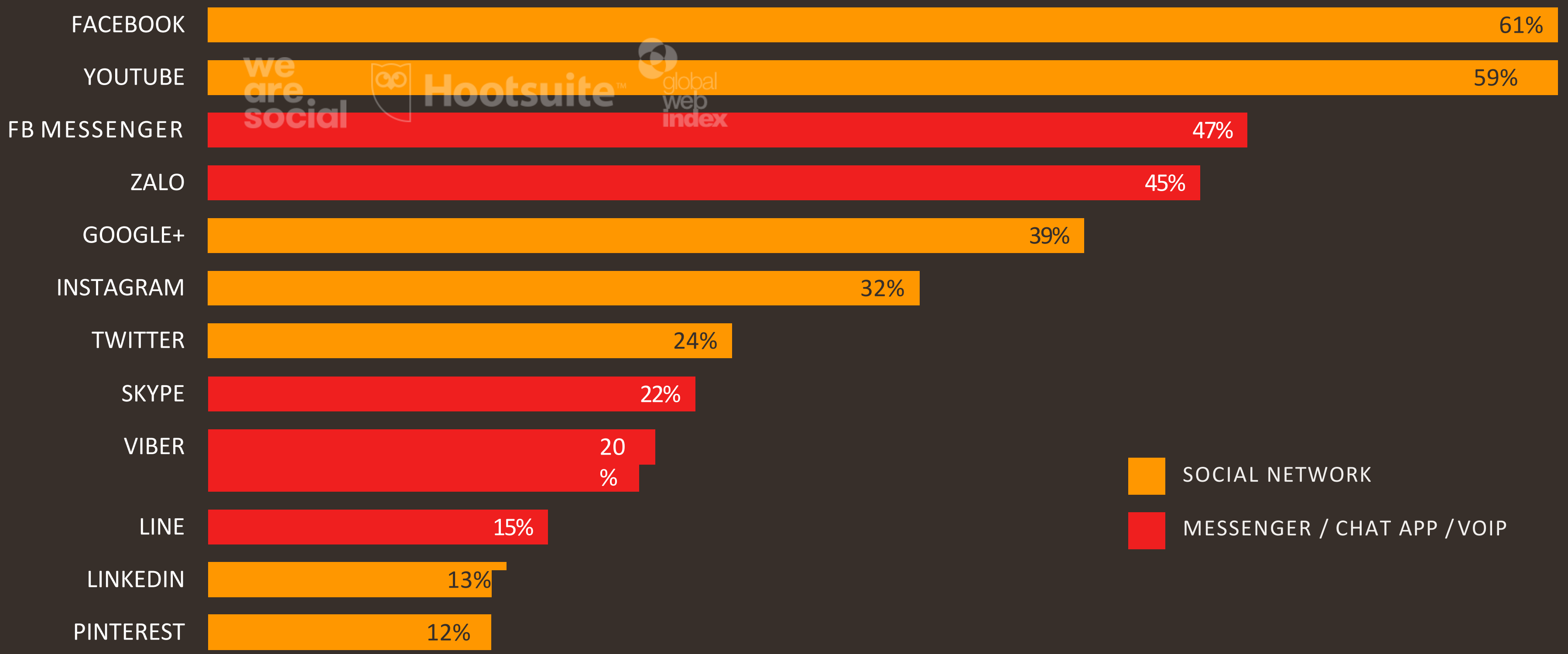
BASED ON THE MONTHLY ACTIVE USERS REPORTED BY THE MOST ACTIVE SOCIAL MEDIA PLATFORM IN EACH COUNTRY

TOTAL NUMBER OF ACTIVE SOCIAL MEDIA USERS	ACTIVE SOCIAL USERS AS A PERCENTAGE OF THE TOTAL POPULATION	TOTAL NUMBER OF SOCIAL USERS ACCESSING VIA MOBILE	ACTIVE MOBILE SOCIAL USERS AS A PERCENTAGE OF THE TOTAL POPULATION
55.00 MILLION	57%	50.00 MILLION	52%

SOURCES: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; DING; TECHRASA; SIMILARWEB; KEPIOS ANALYSIS
NOTE: PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

MOST ACTIVE SOCIAL MEDIA PLATFORMS

SURVEY-BASED DATA: FIGURES REPRESENT USERS' OWN CLAIMED / REPORTED ACTIVITY



SOURCE: GLOBALWEBINDEX, Q2 & Q3 2017. BASED ON A SURVEY OF INTERNET USERS AGED 16-64. **NOTES:** DATA FOR PLATFORMS WITH AN ASTERISK (*) IS COLLECTED IN A DIFFERENT PART OF THE SURVEY TO OTHER PLATFORM DATA. ALL DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE. **ADVISORY:** FIGURES ARE BASED ON RESPONSES TO A SURVEY, AND MAY NOT CORRELATE TO SOCIAL MEDIA PENETRATION FIGURES SHOWN ELSEWHERE IN THIS REPORT; FOR FULL DETAILS, SEE THE NOTES AT THE END OF THIS REPORT.

JAN 2018

FACEBOOK USAGE ANALYSIS

A CLOSER LOOK AT FACEBOOK USE, BROKEN DOWN BY MOBILE USE AND SELF-DECLARED GENDER OF USERS

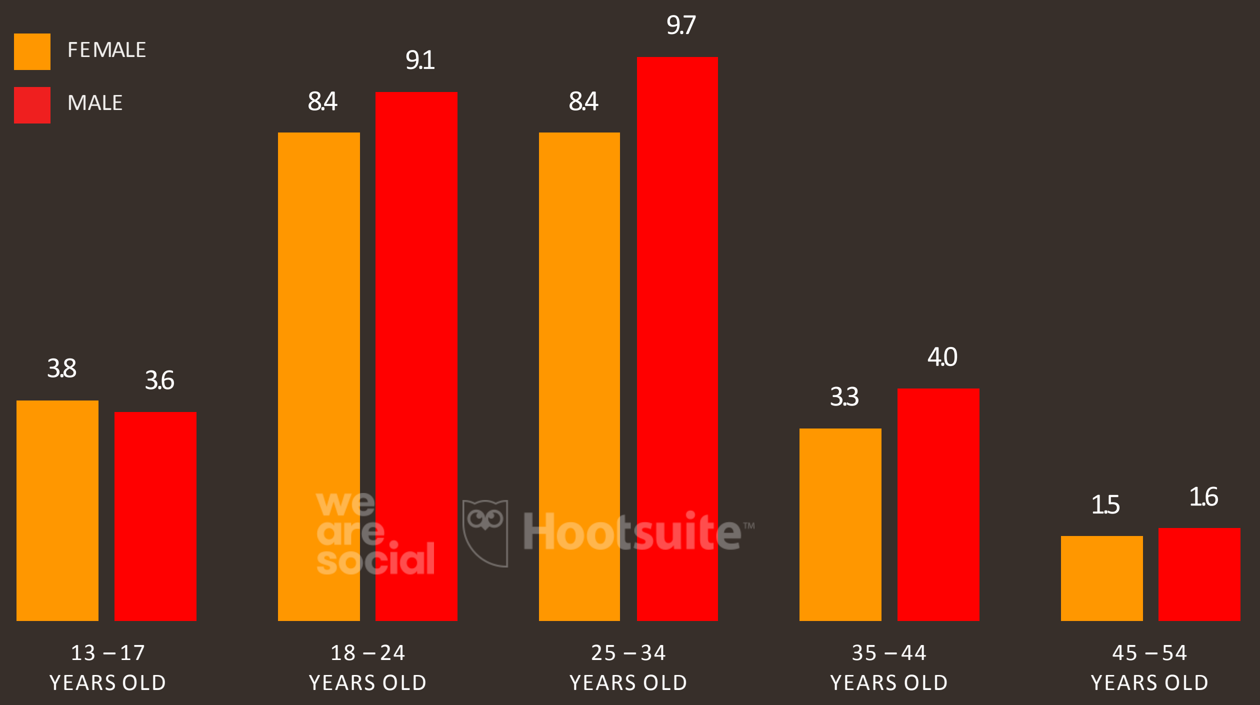
TOTAL NUMBER OF MONTHLY ACTIVE FACEBOOK USERS	ANNUAL CHANGE IN FACEBOOK USERS vs. JANUARY 2017	PERCENTAGE OF FACEBOOK USERS ACCESSING VIA MOBILE	PERCENTAGE OF FACEBOOK PROFILES DECLARED AS FEMALE	PERCENTAGE OF FACEBOOK PROFILES DECLARED AS MALE
55.00 MILLION	+20%	91%	47%	53%

SOURCE: EXTRAPOLATION OF FACEBOOK DATA, JANUARY 2018.

JAN 2018

PROFILE OF FACEBOOK USERS

A BREAKDOWN OF THE COUNTRY'S FACEBOOK'S USERS BY AGE AND GENDER, IN MILLIONS



AGE	TOTAL	FEMALE	MALE
TOTAL	**55,000,000**	**47%**	**53%**
13 – 17	7,400,000	7%	7%
18 – 24	17,000,000	15%	16%
25 – 34	18,000,000	15%	18%
35 – 44	7,300,000	6%	7%
45 – 54	3,100,000	3%	3%
55 – 64	1,300,000	1%	1%
65+	540,000	0.3%	0.7%

SOURCE: EXTRAPOLATION OF FACEBOOK DATA, JANUARY 2018. **NOTES:** THE 'TOTAL' COLUMN OF THE INSET TABLE SHOWS ORIGINAL VALUES, WHILE GRAPH VALUES HAVE BEEN DIVIDED BY ONE MILLION. TABLE PERCENTAGES REPRESENT THE RESPECTIVE GENDER AND AGE GROUP'S SHARE OF TOTAL NATIONAL FACEBOOK USERS. TABLE VALUES MAY NOT SUM EXACTLY DUE TO ROUNDING IN THE SOURCE DATA.

JAN 2018

AVERAGE FACEBOOK PAGE POST REACH

AVERAGE MONTHLY GROWTH IN PAGE LIKES ('FANS'), AVERAGE REACH OF PAGE POSTS vs. PAGE LIKES, AND PAID MEDIA

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
+1.16%	17.6%	6.7%	28.2%	39.2%

SOURCE: LOCOWISE, JANUARY 2018. DATA REPRESENTS AVERAGE FIGURES FOR FULL-YEAR 2017. **NOTE:** REACH FIGURES COMPARE THE NUMBER OF TIMES THAT A POST WAS SERVED IN USERS' NEWSFEEDS TO THE TOTAL NUMBER OF PAGE 'FANS' (I.E. USERS THAT HAD LIKED THE PAGE) AT THE TIME THAT THE POST WAS PUBLISHED.

JAN 2018

AVERAGE FACEBOOK ENGAGEMENT RATES

THE NUMBER OF PEOPLE WHO ENGAGE WITH A FACEBOOK PAGE'S POSTS vs. THE NUMBER OF PEOPLE THAT THOSE POSTS REACH

AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE POSTS (ALL TYPES)	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE VIDEO POSTS	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE PHOTO POSTS	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE LINK POSTS	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE STATUS POSTS
4.30%	9.56%	6.29%	5.28%	5.17%

SOURCE: LOCOWISE, JANUARY 2018. DATA REPRESENTS AVERAGE FIGURES FOR FULL-YEAR 2017. **NOTE:** ENGAGEMENT RATES COMPARE THE NUMBER OF PEOPLE WHO INTERACTED WITH A POST TO THE TOTAL NUMBER OF UNIQUE USERS TO WHOM THAT POST WAS SERVED, REGARDLESS OF WHETHER THOSE USERS WERE FANS OF THE PAGE AT THAT TIME.

JAN 2018

INSTAGRAM USAGE ANALYSIS

AN OVERVIEW OF MONTHLY ACTIVE INSTAGRAM USERS, BROKEN DOWN BY GENDER

TOTAL NUMBER OF MONTHLY ACTIVE INSTAGRAM USERS	ACTIVE INSTAGRAM USERS AS A PERCENTAGE OF TOTAL POPULATION	FEMALE USERS AS A PERCENTAGE OF ALL ACTIVE INSTAGRAM USERS	MALE USERS AS A PERCENTAGE OF ALL ACTIVE INSTAGRAM USERS
5.90 MILLION	6%	58%	42%

SOURCE: EXTRAPOLATION OF DATA FROM INSTAGRAM (VIA FACEBOOK), JANUARY 2018. PENETRATION RATES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

JAN 2018

MOBILE USERS vs. MOBILE CONNECTIONS

COMPARING THE NUMBER OF UNIQUE MOBILE USERS TO THE NUMBER OF MOBILE CONNECTIONS

NUMBER OF UNIQUE MOBILE USERS (ANY TYPE OF HANDSET)	MOBILE PENETRATION (UNIQUE USERS vs. TOTAL POPULATION)	TOTAL NUMBER OF MOBILE CONNECTIONS	MOBILE CONNECTIONS AS A PERCENTAGE OF TOTAL POPULATION	AVERAGE NUMBER OF CONNECTIONS PER UNIQUE MOBILE USER
70.03 MILLION	73%	146.5 MILLION	153%	2.09

SOURCES: UNIQUE MOBILE USERS: GSMA INTELLIGENCE, JANUARY 2018; GOOGLE CONSUMER BAROMETER, JANUARY 2018; MOBILE CONNECTIONS: GSMA INTELLIGENCE, Q4 2017. **NOTE:** PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

JAN 2018

MOBILE CONNECTIONS BY TYPE

BASED ON THE NUMBER OF CELLULAR CONNECTIONS (NOTE: NOT UNIQUE INDIVIDUALS)

TOTAL NUMBER OF MOBILE CONNECTIONS	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 & 4G)
146.5 MILLION	153%	88%	12%	34%

SOURCE: GSMA INTELLIGENCE, Q4 2017. **NOTE:** PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

MOBILE CONNECTIVITY INDEX

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

OVERALL COUNTRY INDEX SCORE	MOBILE NETWORK INFRASTRUCTURE	AFFORDABILITY OF DEVICES & SERVICES	CONSUMER READINESS	AVAILABILITY OF RELEVANT CONTENT & SERVICES
59.65	41.30	68.70	74.02	60.30
OUT OF A MAXIMUM POSSIBLE SCORE OF 100	OUT OF A MAXIMUM POSSIBLE SCORE OF 100	OUT OF A MAXIMUM POSSIBLE SCORE OF 100	OUT OF A MAXIMUM POSSIBLE SCORE OF 100	OUT OF A MAXIMUM POSSIBLE SCORE OF 100

SOURCE: GSMA INTELLIGENCE, Q4 2017. TO ACCESS THE COMPLETE MOBILE CONNECTIVITY INDEX, VISIT HTTP://WWW.MOBILECONNECTIVITYINDEX.COM/

JAN
2018

MOBILE ACTIVITIES

SURVEY-BASED DATA: FIGURES REPRESENT RESPONDENTS' SELF-REPORTED ACTIVITY

PERCENTAGE OF THE POPULATION USING MOBILE MESSENGERS	PERCENTAGE OF THE POPULATION WATCHING VIDEOS ON MOBILE	PERCENTAGE OF THE POPULATION PLAYING GAMES ON MOBILE	PERCENTAGE OF THE POPULATION USING MOBILE BANKING	PERCENTAGE OF THE POPULATION USING MOBILE MAP SERVICES
61%	60%	53%	30%	50%

SOURCE: GLOBALWEBINDEX, Q2 & Q3 2017. BASED ON A SURVEY OF INTERNET USERS AGED 16-64.
NOTE: DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE.

SMARTPHONE LIFE MANAGEMENT ACTIVITIES

PERCENTAGE OF THE TOTAL POPULATION USING A SMARTPHONE TO PERFORM EACH TASK [SURVEY-BASED]

USE THE ALARM CLOCK FUNCTION	MANAGE DIARY OR APPOINTMENTS	CHECK THE WEATHER	TRACK HEALTH, DIET, OR ACTIVITY LEVELS
43%	24%	22%	7%

TAKE PHOTOS OR VIDEOS	CHECK THE NEWS	READ E-BOOKS OR E-MAGAZINES	MANAGE LISTS (E.G. SHOPPING, TASKS)
47%	36%	33%	15%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. ***NOTES:** DATA BASED ON SURVEY RESPONSES FROM ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE.

JAN 2018

TOP APP RANKINGS

RANKINGS OF TOP MOBILE APPS BY MONTHLY ACTIVE USERS AND BY NUMBER OF DOWNLOADS

RANKING OF MOBILE APPS BY MONTHLY ACTIVE USERS

#	APP NAME	DEVELOPER / COMPANY
01	FACEBOOK	FACEBOOK
02	FACEBOOK MESSENGER	FACEBOOK
03	ZALO	VNG
04	ZING MP3	VNG
05	VIBER	RAKUTEN
06	GRAB	GRAB
07	INSTAGRAM	FACEBOOK
08	NHACCUATUI	NCT
09	SKYPE	MICROSOFT
10	UBER	UBER TECHNOLOGIES

RANKING OF MOBILE APPS BY NUMBER OF DOWNLOADS

#	APP NAME	DEVELOPER / COMPANY
01	FACEBOOK MESSENGER	FACEBOOK
02	FACEBOOK	FACEBOOK
03	ZALO	VNG
04	ZING MP3	VNG
05	CAMERA360	PINGUO
06	B612	NAVER
07	NHACCUATUI	NCT
08	SNOW SELFIE CAMERA	NAVER
09	WIFI MASTER KEY	SHANGHAI LANTERN NETWORK
10	SHOPEE	GARENA ONLINE

SOURCE: APP ANNIE, JANUARY 2018, BASED ON DATA IN THE *APP ANNIE 2017 RETROSPECTIVE* REPORT. FOR MORE DETAILS, VISIT HTTPS://WWW.APPANNIE.COM/
NOTES: RANKINGS ARE BASED ON COMBINED DATA FOR BOTH THE APPLE iOS APP STORE AND THE GOOGLE PLAY APP STORE. MONTHLY ACTIVE USER RANKINGS ARE BASED ON MONTHLY AVERAGES FOR FULL-YEAR 2017. **NOTE:** RANKINGS EXCLUDE PRE-INSTALLED APPS, SUCH AS YOUTUBE ON ANDROID DEVICES, AND SAFARI ON APPLE DEVICES.

FINANCIAL INCLUSION FACTORS

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

HAS A BANK ACCOUNT

31%

HAS A CREDIT CARD

2%

MAKES AND / OR RECEIVES MOBILE PAYMENTS VIA GSMA

0.5%

MAKES ONLINE PURCHASES AND / OR PAYS BILLS ONLINE

9%

PERCENTAGE OF WOMEN WITH A CREDIT CARD

2%

PERCENTAGE OF MEN WITH A CREDIT CARD

2%

PERCENTAGE OF WOMEN MAKING INTERNET PAYMENTS

8%

PERCENTAGE OF MEN MAKING INTERNET PAYMENTS

11%

SOURCE: WORLD BANK GLOBAL FINANCIAL INCLUSION DATA (2015). **NOTE:** FIGURES REPRESENT THE PERCENTAGE OF PEOPLE AGED 15+, NOT TOTAL POPULATION.

E-COMMERCE ACTIVITIES IN PAST 30 DAYS

SURVEY-BASED DATA: FIGURES REPRESENT RESPONDENTS' SELF-REPORTED ACTIVITY

SEARCHED ONLINE FOR A PRODUCT OR SERVICE TO BUY	VISITED AN ONLINE RETAIL STORE	PURCHASED A PRODUCT OR SERVICE ONLINE	MADE AN ONLINE PURCHASE VIA A LAPTOP OR DESKTOP COMPUTER	MADE AN ONLINE PURCHASE VIA A MOBILE DEVICE
57%	54%	47%	33%	33%

SOURCE: GLOBALWEBINDEX, Q2 & Q3 2017. BASED ON A SURVEY OF INTERNET USERS AGED 16-64.
NOTE: DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE.

E-COMMERCE SPEND BY CATEGORY

TOTAL ANNUAL AMOUNT SPENT ON CONSUMER E-COMMERCE CATEGORIES, IN UNITED STATES DOLLARS

FASHION & BEAUTY	ELECTRONICS & PHYSICAL MEDIA	FOOD & PERSONAL CARE	FURNITURE & APPLIANCES
$358.3 MILLION	$840.7 MILLION	$232.7 MILLION	$367.9 MILLION

TOYS, DIY & HOBBIES	TRAVEL (INCLUDING ACCOMMODATION)	DIGITAL MUSIC	VIDEO GAMES
$386.3 MILLION	$541.1 MILLION	$9.3 MILLION	$186.1 MILLION

SOURCES: STATISTA DIGITAL MARKET OUTLOOK, E-COMMERCE INDUSTRY, E-TRAVEL INDUSTRY, AND DIGITAL MEDIA INDUSTRY, ALL ACCESSED JANUARY 2018.
NOTE: FIGURES ARE BASED ON ESTIMATES OF FULL-YEAR CONSUMER SPEND IN 2017, AND DO NOT INCLUDE B2B SPEND.

E-COMMERCE GROWTH BY CATEGORY

ANNUAL CHANGE IN THE TOTAL AMOUNT SPENT ON CONSUMER E-COMMERCE CATEGORIES, IN UNITED STATES DOLLARS

FASHION & BEAUTY	ELECTRONICS & PHYSICAL MEDIA	FOOD & PERSONAL CARE	FURNITURE & APPLIANCES
+34%	+16%	+20%	+18%

TOYS, DIY & HOBBIES	TRAVEL (INCLUDING ACCOMMODATION)	DIGITAL MUSIC	VIDEO GAMES
+21%	+27%	+8%	+14%

SOURCES: STATISTA DIGITAL MARKET OUTLOOK, E-COMMERCE INDUSTRY, E-TRAVEL INDUSTRY, AND DIGITAL MEDIA INDUSTRY, ALL ACCESSED JANUARY 2018.
NOTE: FIGURES ARE BASED ON ESTIMATES OF FULL-YEAR CONSUMER SPEND IN 2017, AND DO NOT INCLUDE B2B SPEND.

JAN 2018

E-COMMERCE DETAIL: CONSUMER GOODS

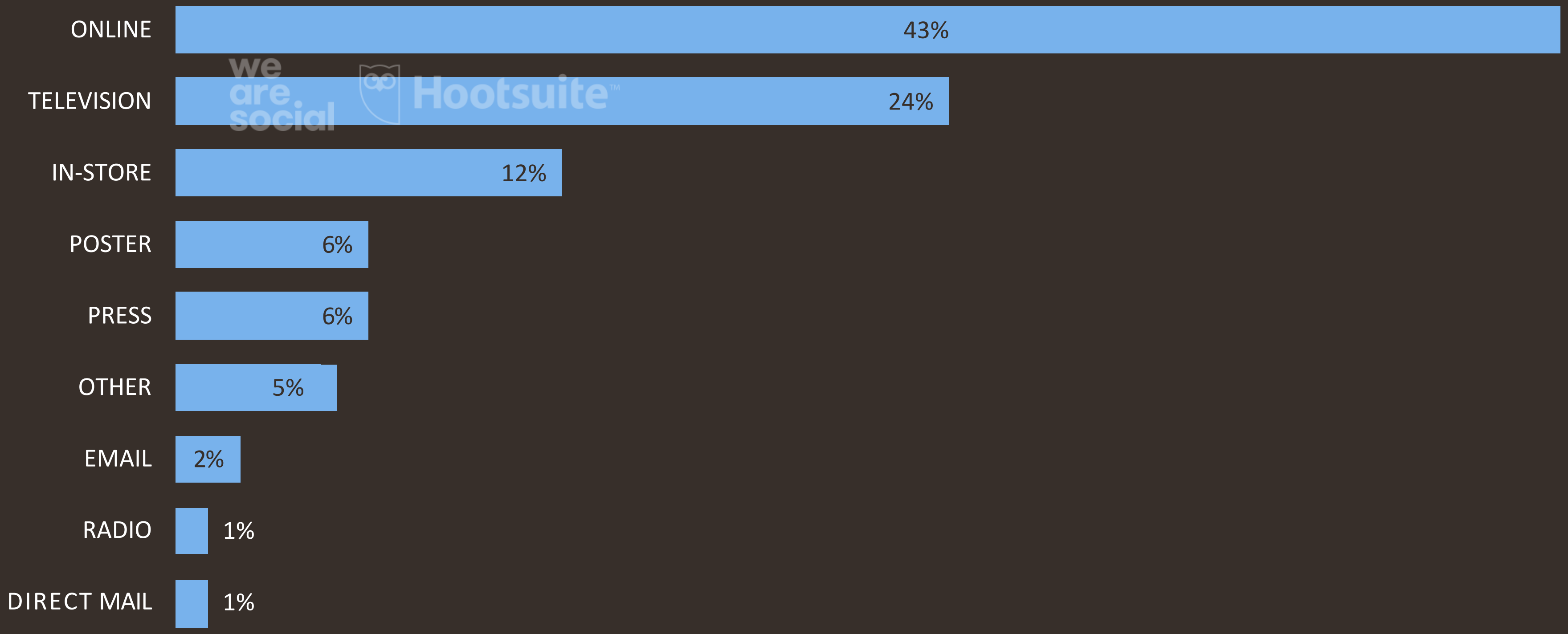
AN OVERVIEW OF THE E-COMMERCE MARKET FOR CONSUMER GOODS, WITH VALUES IN UNITED STATES DOLLARS

TOTAL NUMBER OF PEOPLE PURCHASING CONSUMER GOODS VIA E-COMMERCE	PENETRATION OF CONSUMER GOODS E-COMMERCE (TOTAL POPULATION)	VALUE OF THE CONSUMER GOODS E-COMMERCE MARKET (TOTAL ANNUAL SALES REVENUE)	AVERAGE ANNUAL REVENUE PER USER OF CONSUMER GOODS E-COMMERCE (ARPU)
35.08 MILLION	37%	$2.186 BILLION	$62
YEAR-ON-YEAR CHANGE: +6%		YEAR-ON-YEAR CHANGE: +20%	YEAR-ON-YEAR CHANGE: +14%

SOURCE: STATISTA DIGITAL MARKET OUTLOOK, E-COMMERCE INDUSTRY, ACCESSED JANUARY 2018. **NOTES:** FIGURES REPRESENT SALES OF PHYSICAL GOODS VIA DIGITAL CHANNELS ON ANY DEVICE TO PRIVATE END USERS, AND DO NOT INCLUDE DIGITAL MEDIA, DIGITAL SERVICES SUCH AS TRAVEL OR SOFTWARE, B2B PRODUCTS AND SERVICES, RESALE OF USED GOODS, OR SALES BETWEEN PRIVATE PERSONS (P2P COMMERCE). PENETRATION FIGURE REPRESENTS PERCENTAGE OF TOTAL POPULATION, REGARDLESS OF AGE.

ADVERTISING MEDIA: FIRST AWARENESS

THE CHANNEL THAT FIRST INTRODUCED INTERNET USERS* TO A PRODUCT OR SERVICE THAT THEY SUBSEQUENTLY PURCHASED



SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. ***NOTE:** DATA REPRESENTS ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. FIGURES MAY NOT TOTAL TO 100% DUE TO ROUNDING.

MORE INFORMATION

CLICK THE LINKS BELOW TO READ AND DOWNLOAD THE FULL SET OF 2018 GLOBAL DIGITAL REPORTS, AND ACCESS ADDITIONAL INSIGHTS AND RESOURCES FROM BOTH HOOTSUITE AND WE ARE SOCIAL:

we are social

CLICK HERE TO ACCESS WE ARE SOCIAL'S RESOURCES

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SPECIAL THANKS: GLOBALWEBINDEX

GlobalWebIndex is the leading provider of audience profiling data to agencies, publishers and brands worldwide.

90% GLOBAL COVERAGE

QUARTERLY DATA COLLECTION ACROSS 42 MARKETS

CROSS-DEVICE COVERAGE

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SPECIAL THANKS: GSMA INTELLIGENCE

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.

Learn more about GSMA Intelligence at **http://www.gsmaintelligence.com**

SPECIAL THANKS: STATISTA

Statista is one of the world's largest online statistics databases. Its Digital Market Outlook products provide forecasts, detailed market insights, and key indicators on 8 digital verticals including e-commerce, digital media, advertising, and smart home with 33 segments across more than 50 regions and countries.

78% OF GLOBAL INTERNET POPULATION

50 DIGITAL ECONOMIES

90% OF WORLDWIDE ECONOMIC POWER

MORE THAN 30,000 INTERACTIVE STATISTICS

Learn more about Statista's Digital Market Outlook at **http://www.statista.com**

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Locowise is a social media performance measurement platform that helps agencies to manage clients, produce and prove value, and win new business.

CUSTOM REPORT BUILDER WITH OVER 300 METRICS

CAMPAIGN ANALYSIS, TRACKING AND REPORTING

INSIGHTS FROM ALL YOUR NETWORKS IN ONE PLACE

PREDICTIVE METRICS TO DRIVE FUTURE STRATEGY

Find out more: **https://locowise.com**

SPECIAL THANKS: SIMILARWEB

SimilarWeb is the pioneer of market intelligence and the standard for understanding the digital world. SimilarWeb provides granular insights about any website or app across all industries in every region.

WEB INTELLIGENCE

APP INTELLIGENCE

GLOBAL COVERAGE

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SPECIAL THANKS: APPANNIE

App Annie delivers the most trusted app market data for businesses to succeed in the global app economy. Over 1million registered members rely on App Annie to better understand the app market, and how to improve user acquisition strategies (paid and ASO), retention, product development to further grow their businesses, and leverage the opportunities around them.

1 MILLION
REGISTERED USERS

BEST-IN-CLASS
DATA

COVERAGE ACROSS
150 COUNTRIES

UNPARALLELED
SERVICE &SUPPORT

Find out more: **http://www.appannie.com**

SPECIAL THANKS: KLEAR

Klear is a big data search engine for influencers. Klear is trusted by the world's leading brands and agencies to help build, scale, and measure influencer programs.

GLOBAL COVERAGE, DOWN TO CITY LEVEL

500 MILLION PROFILES

60,000 INFLUENCE CATEGORIES

FULL INFLUENCER CAMPAIGN SOLUTION

Find out more: **http://klear.com**

SPECIAL THANKS

We'd also like to offer our thanks to the following data providers for publishing much of the remaining data included in this year's reports:

GOOGLE

STATCOUNTER

OOKLA

ALEXA

ERICSSON

Lastly, a big thank you to the **The Noun Project**, who supply and inspire the icons we use in these reports.

DATA SOURCES USED IN THIS REPORT & NOTES ON METHODOLOGIES

POPULATION DATA: United Nations World Population Prospects, 2017 Revision; US Census Bureau (accessed January 2018); United Nations World Urbanization Prospects, 2014 Revision. Literacy rates from UNESCO (accessed January 2018). GDP data from World Bank (accessed January 2018). Median age data from US Census Bureau (accessed January 2018).

DIGITAL DEVICE OWNERSHIP DATA: Google Consumer Barometer (accessed January 2018)**.

DIGITAL ATTITUDES DATA: GlobalWebIndex (Q2 & Q3 2017)*; Google Consumer Barometer (accessed January 2018)**.

INTERNET USER DATA: InternetWorldStats (accessed January 2018); ITU, *Individuals Using the Internet*, 2016; Eurostat online database, *Individuals – internet use* (accessed January 2018); CIA World Factbook (accessed January 2018); Northwestern University in Qatar, *Media use in the Middle East, 2017* (accessed January 2018); national government and regulatory body websites; government officials cited in reputable media. Mobile internet use data from GlobalWebIndex (Q2 & Q3 2017)* and extrapolation of data from Facebook (January 2018). Time spent, and mobile internet usage and penetration data extrapolated from GlobalWebIndex (Q2 & Q3 2017)*. Share of web traffic data from StatCounter (January 2018). Frequency of internet use data from Google Consumer Barometer (accessed January 2018)**. Internet connection speed data from Ookla's *Speed Test* (December 2017). Website rankings from SimilarWeb (Q4 2017) and Alexa (December 2017). Google search query rankings from Google Trends (data for 12 months to January 2018). Frequency of use and TV viewing habits from Google Consumer Barometer (accessed January 2018)**.

SOCIAL MEDIA AND MOBILE SOCIAL MEDIA DATA: Latest reported monthly active user numbers from Facebook, Tencent, VKontakte, LINE, Kakao, Google, Sina, Twitter, Skype, Yahoo!, Viber, Baidu, and Snap, as quoted directly in company documents, or as reported by reputable media (all latest data available at time of publishing in January 2018). Time spent on social media from GlobalWebIndex (Q2 & Q3 2017)*. Facebook and Instagram age and gender figures extrapolated from Facebook data (January 2018). Facebook reach and engagement data from Locowise; data represents monthly averages for full-year 2017.

MOBILE PHONE USERS, MOBILE CONNECTIONS, AND MOBILE BROADBAND DATA: Latest reported global and national data from GSMA Intelligence (Q4 2017); extrapolated global data from GSMA Intelligence (January 2018); Ericsson Mobility Report (November 2017). Usage data extrapolated from GlobalWebIndex (Q2 & Q3 2017)*; Google Consumer Barometer (accessed January 2018)**. GSMA Intelligence Mobile Connectivity Index (accessed January 2018): http://www.mobileconnectivityindex.com/ Smartphone Life Management Activity data from Google Consumer Barometer (accessed January 2018). Mobile app rankings and app usage insights taken from App Annie's *2017 Retrospective* and *Why You Mobile Strategy Needs Apps* reports – for more details, visit http://bit.ly/AppAnnie2017.

E-COMMERCE DATA: Statista *Digital Market Outlook*, e-Commerce, e-Travel, and digital media industry reports (accessed January 2018). For more info, visit http://www.statista.com. GlobalWebIndex (Q2 & Q3 2017)*; Google Consumer Barometer (accessed January 2018)**.

FINANCIAL INCLUSION DATA: World Bank Global Financial Inclusion (accessed January 2018).

NOTES: Some 'annual growth' figures are calculated using the data reported in Hootsuite and We Are Social's *Digital in 2017* report: http://bit.ly/GD2017GO.

*GlobalWebIndex manages a panel of more than 18 million connected consumers, collecting data every quarter across 40 countries around the world, and representing 90% of the global internet population. Visit http://www.globalwebindex.net for more details.

**Google's Consumer Barometer polls a nationally representative total population (online & offline) aged 16+ in each country surveyed except in Argentina, Brazil, China, India, Japan, South Korea, Malaysia, Mexico, Philippines, Vietnam, and the USA, where the sample base is aged 18+. For more details, visit http://www.consumerbarometer.com/.

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 preparation methodologies used by these organisations, as well as the different sample periods during which the 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 have been collected by the same organisation using the same methodology and approach in each wave.

Similarly, reports of internet user numbers vary considerably between different sources, due to the complex nature of collecting this data. In part, this is because there are fewer commercial imperatives for governments and regulators to collect and publish regular internet user data compared to, for example, the regular user number updates published by social media companies, who depend on such data to sell their products and services.

However, the latest user numbers published by these companies 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.

Because of this, on occasion, we've used the latest monthly active user data from social media companies to inform our internet user numbers, especially in less-developed economies, where 'official' internet user numbers are published less frequently. As a result, there are a number of countries in this report where the number of social media users equals the number of internet users.

It's unlikely that 100 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, in some instances in this year's report, metrics may have decreased year-on-year due to corrections in the source data, actual declines in user numbers, and changes in the primary data source we've used in our reporting due to reasons such as increased reliability, or the non-availability of updated numbers from previous providers.

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: info@kepios.com

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