DIGITAL 2025

VIETNAM

THE ESSENTIAL GUIDE TO DIGITAL TRENDS

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PARTNERS THAT MAKE THE GLOBAL DIGITAL REPORTS SERIES POSSIBLE

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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
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BHUTAN	CURAÇAO	GUADELOUPE	KYRGYZSTAN	MOZAMBIQUE	RUSSIAN FEDERATION	SWEDEN	WESTERN SAHARA
BOLIVIA	CYPRUS	GUAM	LAOS	MYANMAR	RWANDA	SWITZERLAND	YEMEN
BONAIRE, ST. EUSTATIUS & SABA	CZECHIA	GUATEMALA	LATVIA	NAMIBIA	ST. BARTHÉLEMY	SYRIA	ZAMBIA
BOSNIA & HERZEGOVINA	DENMARK	GUERNSEY	LEBANON	NAURU	ST. HELENA	TAIWAN	ZIMBABWE

IMPORTANT NOTES ON COMPARING DATA

The findings published in this report use the latest data available at the time of production. This may include revised figures for historical data points that were not available when we produced previous reports in the Global Digital Reports series. From time to time, we may also change the data sources that we use to inform specific data points, and we may also change how we calculate certain values. Similarly, our data partners may change the ways in which they source, calculate, or report the data that they share with us. As a result, findings published in this report **may not correlate** with findings published in our previous reports, especially where such findings represent change over time (e.g. annual growth). Where we report figures for change over time, such figures will use the latest available data, so we recommend using the **values published in this report**, rather than trying to recalculate such values using data from previous reports. When we're aware of the potential for historical mismatches, we include a note on **comparability** in the footnotes of each relevant slide. Where we include such advisories, or where we report values for change over time as "[N/A]", the most recent data **do not correlate** with the equivalent data point(s) published in previous reports, so we **strongly advise readers not to compare** these figures with equivalents published in previous reports. In particular, the social media platforms featured in this report regularly revise the figures that they report for advertising reach, and this may result in the latest numbers appearing to be lower than the values for the same data points published in our previous reports. However, these revisions **do not** necessarily imply any change in the active use of these platforms, and should not be interpreted as such. Furthermore, in addition to changes in data sources and calculations, please note that the figures we publish for "social media user identities" **may not** represent unique individuals. This is because some individuals may manage multiple social media accounts, and because some social media accounts may represent 'non-human' entities (e.g. businesses, animals, music groups, etc.). As a result, the figures we publish for social media user identities may **exceed** the figures that we publish for total population or for individuals using the internet, but such anomalies do not represent mistakes. For more information, please read our notes on data variance, mismatches, and curiosities: https://datareportal.com/notes-on-data.

GLOBAL HEADLINES

GLOBAL DIGITAL HEADLINES

OVERVIEW OF THE ADOPTION AND USE OF CONNECTED DEVICES AND SERVICES

NOTE: SIGNIFICANT REVISIONS TO SOURCE DATA MEAN THAT FIGURES SHOWN HERE ARE NOT COMPARABLE WITH PREVIOUS REPORTS. SEE THE IMPORTANT NOTES AT THE START OF THIS REPORT FOR DETAILS.

TOTAL POPULATION	CELLULAR MOBILE CONNECTIONS	INDIVIDUALS USING THE INTERNET	SOCIAL MEDIA USER IDENTITIES
8.20 BILLION	**8.78 BILLION**	**5.56 BILLION**	**5.24 BILLION**
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
+0.9%	**+2.2%**	**+2.5%**	**+4.1%**
+70 MILLION	**+190 MILLION**	**+136 MILLION**	**+206 MILLION**
URBANISATION	TOTAL vs. POPULATION	TOTAL vs. POPULATION	TOTAL vs. POPULATION
58.1%	**107%**	**67.9%**	**63.9%**

SOURCES: U.N.; GOVERNMENT AUTHORITIES; GSMA INTELLIGENCE; ITU; EUROSTAT; CNNIC; KANTAR & IAMAI; PLATFORM RESOURCES; OCDH; BETA RESEARCH CENTER; KEPIOS ANALYSIS. **ADVISORY:** SOCIAL MEDIA USER IDENTITIES MAY NOT REPRESENT UNIQUE INDIVIDUALS. **COMPARABILITY:** SOURCE CHANGES AND BASE REVISIONS. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS. GLOBAL DATASETS MAY USE DIFFERENT SOURCES vs. COUNTRY AND REGIONAL DATA, SO SUMS MAY NOT MATCH. **IMPORTANT:** NEGATIVE VALUES MAY INDICATE SOURCE DATA CORRECTIONS, AND MAY NOT REPRESENT DECREASES IN THE RELEVANT METRIC. WHERE YEAR-ON-YEAR CHANGE IS "[N/A]", COMPARISONS WITH HISTORICAL DATA WILL PRODUCE INACCURATE RESULTS. PLEASE SEE NOTES ON DATA.

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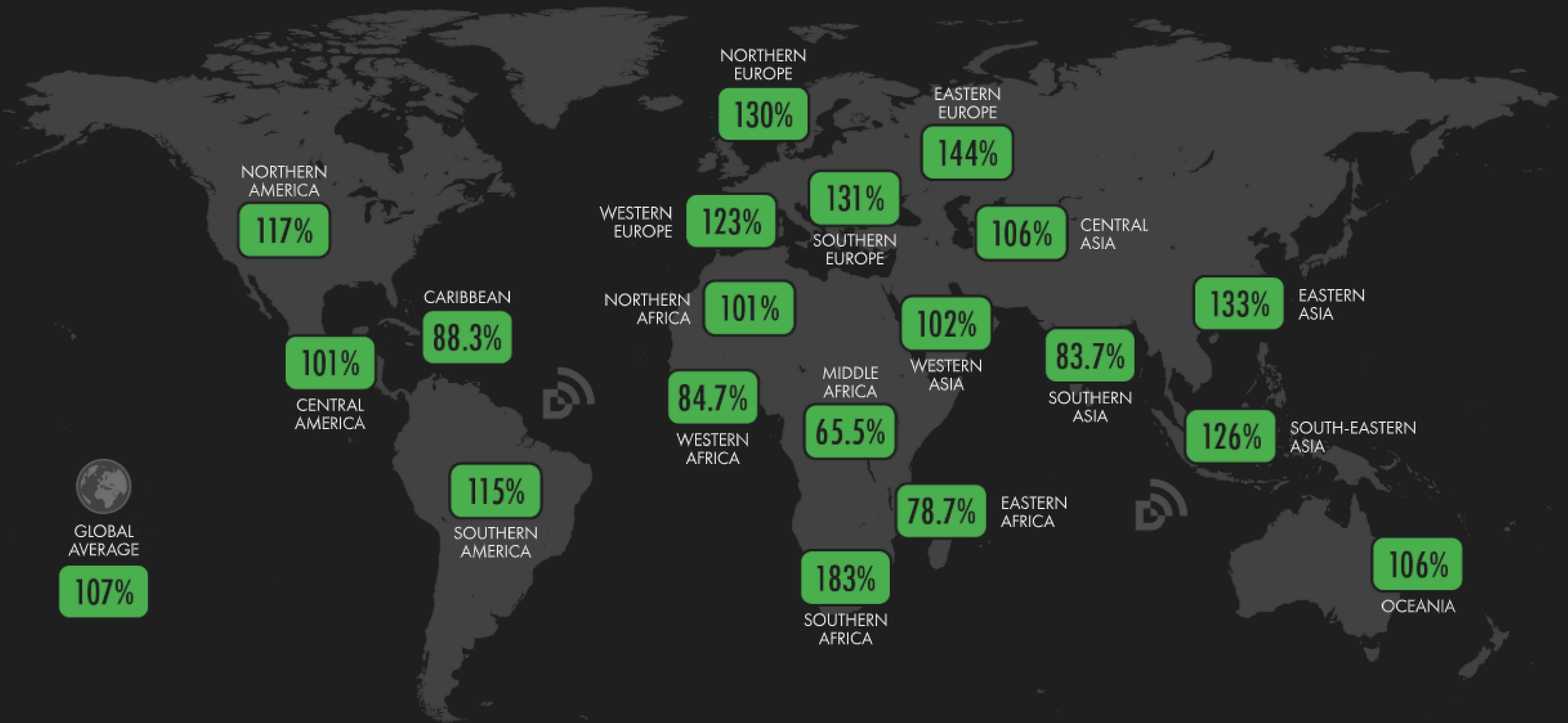
MOBILE CONNECTIVITY

CELLULAR MOBILE CONNECTIONS COMPARED WITH TOTAL POPULATION

GLOBAL OVERVIEW



SOURCES: GSMA INTELLIGENCE; UNITED NATIONS. **NOTE:** FIGURES MAY EXCEED 100% BECAUSE SOME INDIVIDUALS MAY USE MORE THAN ONE CELLULAR CONNECTION. REGIONS BASED ON THE UNITED NATIONS GEOSCHEME. **COMPARABILITY:** BASE CHANGES. SEE NOTES ON DATA.

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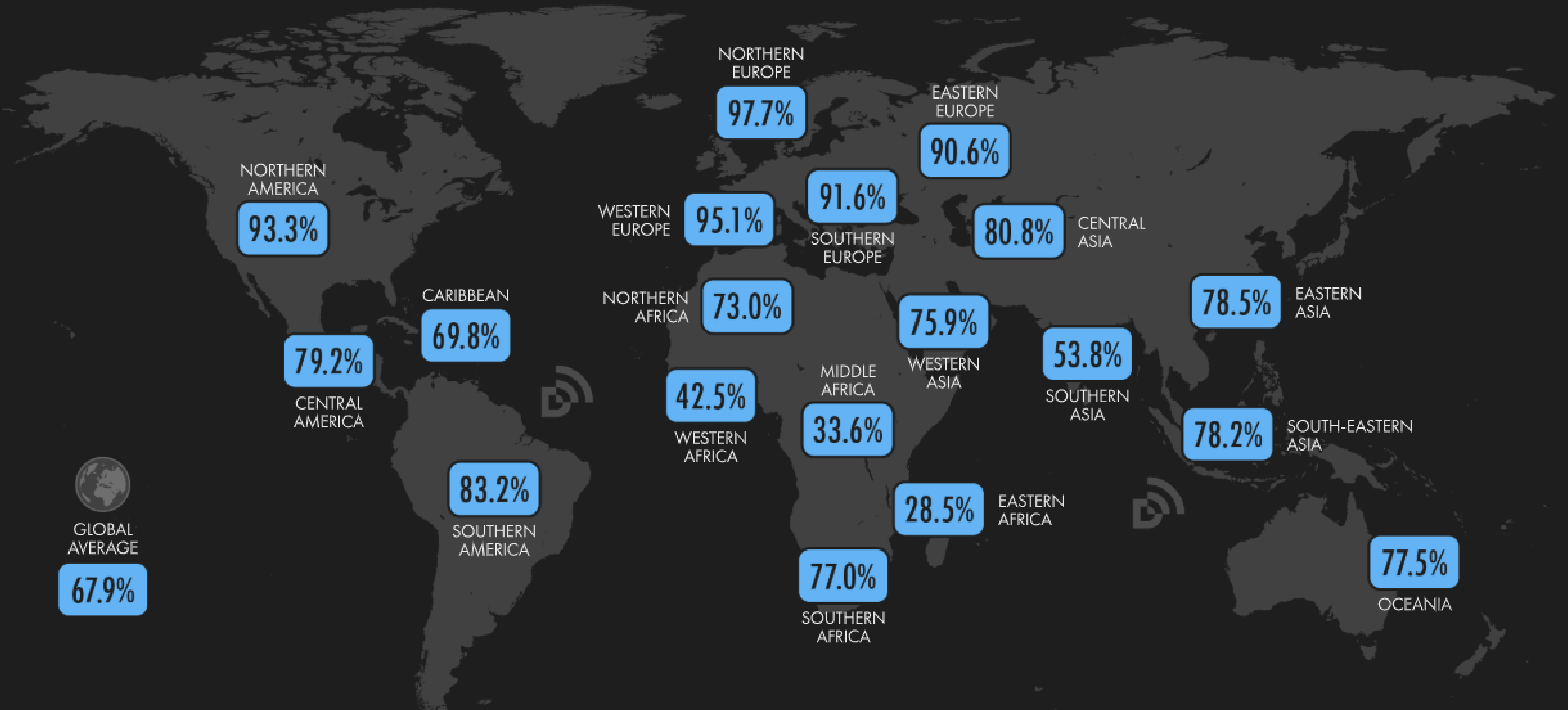
INTERNET ADOPTION

INDIVIDUALS USING THE INTERNET AS A PERCENTAGE OF TOTAL POPULATION



SOURCES: KEPIOS ANALYSIS; ITU; GSMA INTELLIGENCE; EUROSTAT; GOOGLE'S ADVERTISING RESOURCES; CNNIC; KANTAR & IAMAI; GOVERNMENT RESOURCES; UNITED NATIONS. **NOTE:** REGIONS BASED ON THE UNITED NATIONS GEOSCHEME. LOCAL COUNTRY VALUES HAVE BEEN CAPPED AT 99% OF THE POPULATION. **COMPARABILITY:** SOURCE AND BASE CHANGES. ALL FIGURES USE THE LATEST AVAILABLE DATA, BUT SOME SOURCES DO NOT PUBLISH REGULAR UPDATES, SO FIGURES MAY UNDER-REPRESENT ACTUAL USE. SEE NOTES ON DATA.

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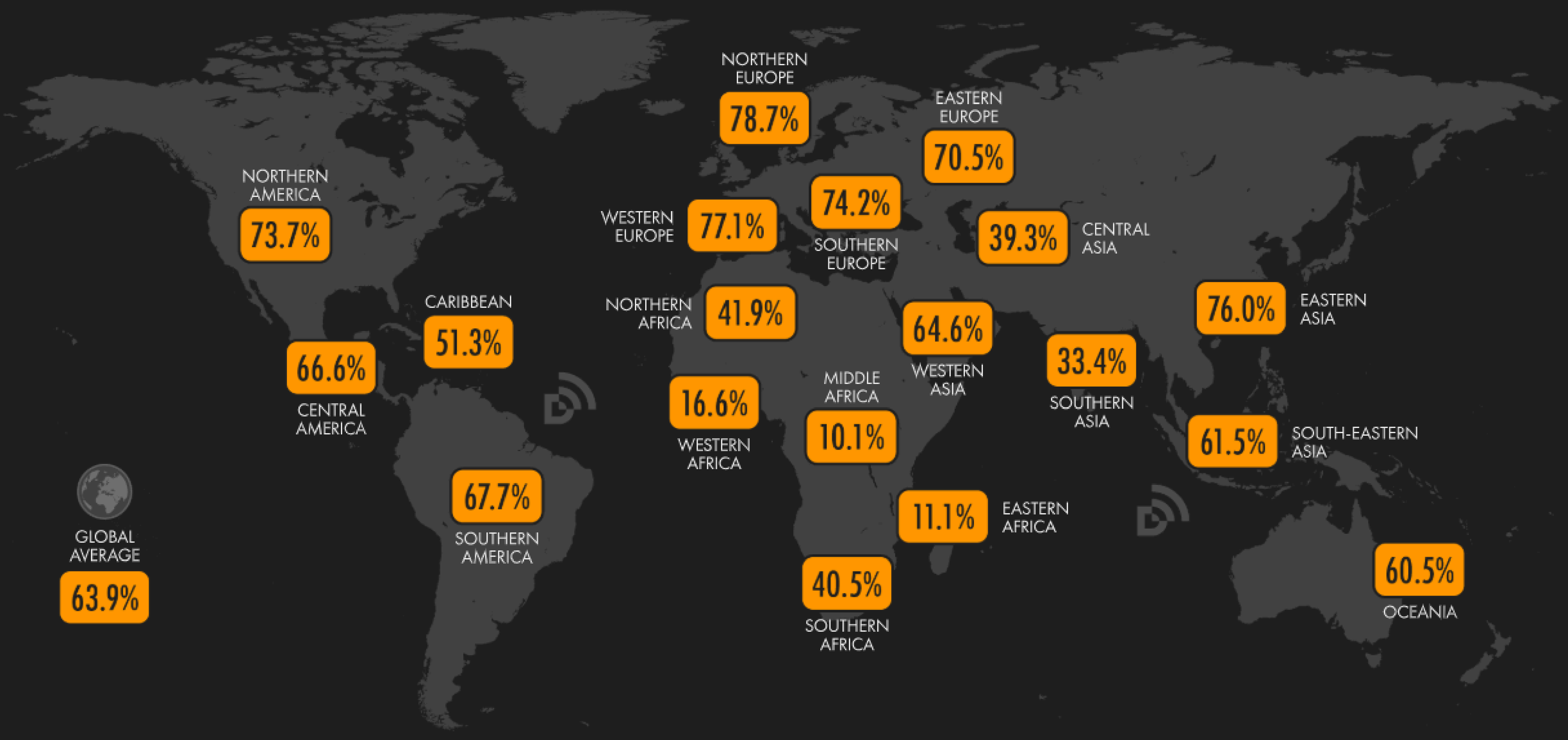
SOCIAL MEDIA USE vs. TOTAL POPULATION

SOCIAL MEDIA USER IDENTITIES AS A PERCENTAGE OF THE TOTAL POPULATION (NOTE: USER IDENTITIES MAY NOT REPRESENT UNIQUE INDIVIDUALS)



SOURCES: KEPIOS ANALYSIS; COMPANY ADVERTISING RESOURCES AND ANNOUNCEMENTS; CNNIC; BETA RESEARCH CENTER; OCDH. ADVISORY: SOCIAL MEDIA USER IDENTITIES MAY NOT REPRESENT UNIQUE INDIVIDUALS. NOTES: DOES NOT INCLUDE DATA FOR SYRIA. REGIONS BASED ON THE UNITED NATIONS GEOSCHEME. COMPARABILITY: SOURCE AND METHODOLOGY CHANGES; BASE REVISIONS. FIGURES FOR LOCAL AND REGIONAL SOCIAL MEDIA USE RELY ON DIFFERENT DATASETS TO GLOBAL FIGURES. SEE NOTES ON DATA.

EXPLORE OUR FLAGSHIP DIGITAL 2025 REPORTS

CLICK HERE TO READ OUR FLAGSHIP DIGITAL 2025 GLOBAL OVERVIEW REPORT, PACKED WITH ALL THE NUMBERS YOU NEED TO MAKE SENSE OF THE CURRENT STATE OF DIGITAL

CLICK HERE TO READ OUR DIGITAL 2025 LOCAL COUNTRY HEADLINES REPORT, WITH ESSENTIAL STATS FOR DIGITAL ADOPTION IN EVERY COUNTRY AROUND THE WORLD

VIETNAM

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OVERVIEW OF THE ADOPTION AND USE OF CONNECTED DEVICES AND SERVICES

NOTE: SIGNIFICANT REVISIONS TO SOURCE DATA MEAN THAT FIGURES SHOWN HERE ARE NOT COMPARABLE WITH PREVIOUS REPORTS. SEE THE IMPORTANT NOTES AT THE START OF THIS REPORT FOR DETAILS.

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TOTAL POPULATION	CELLULAR MOBILE CONNECTIONS	INDIVIDUALS USING THE INTERNET	SOCIAL MEDIA USER IDENTITIES
101 MILLION	**127 MILLION**	**79.8 MILLION**	**76.2 MILLION**
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
+0.6%	**+1.8%**	**+0.3%**	**+4.8%**
+625 THOUSAND	**+2.2 MILLION**	**+223 THOUSAND**	**+3.5 MILLION**
URBANISATION	TOTAL vs. POPULATION	TOTAL vs. POPULATION	TOTAL vs. POPULATION
40.5%	**126%**	**78.8%**	**75.2%**

SOURCES: U.N.; GOVERNMENT AUTHORITIES; GSMA INTELLIGENCE; ITU; EUROSTAT; CNNIC; KANTAR & IAMAI; PLATFORM RESOURCES; OCDH; BETA RESEARCH CENTER; KEPIOS ANALYSIS. **ADVISORY:** SOCIAL MEDIA USER IDENTITIES MAY NOT REPRESENT UNIQUE INDIVIDUALS. **COMPARABILITY:** SOURCE CHANGES AND BASE REVISIONS. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS. GLOBAL DATASETS MAY USE DIFFERENT SOURCES vs. COUNTRY AND REGIONAL DATA, SO SUMS MAY NOT MATCH. **IMPORTANT:** NEGATIVE VALUES MAY INDICATE SOURCE DATA CORRECTIONS, AND MAY NOT REPRESENT DECREASES IN THE RELEVANT METRIC. WHERE YEAR-ON-YEAR CHANGE IS "[N/A]", COMPARISONS WITH HISTORICAL DATA WILL PRODUCE INACCURATE RESULTS. PLEASE SEE NOTES ON DATA.


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THE LIVEABLE WEB
we are social
PRIMAL RENAISSANCE
LOW STAKES SOCIAL
INTENTIONAL CONSUMERISM
MODERN MYTHMAKING
NEW INTIMACIES
THE FIVE TRENDS
Explore the trends:
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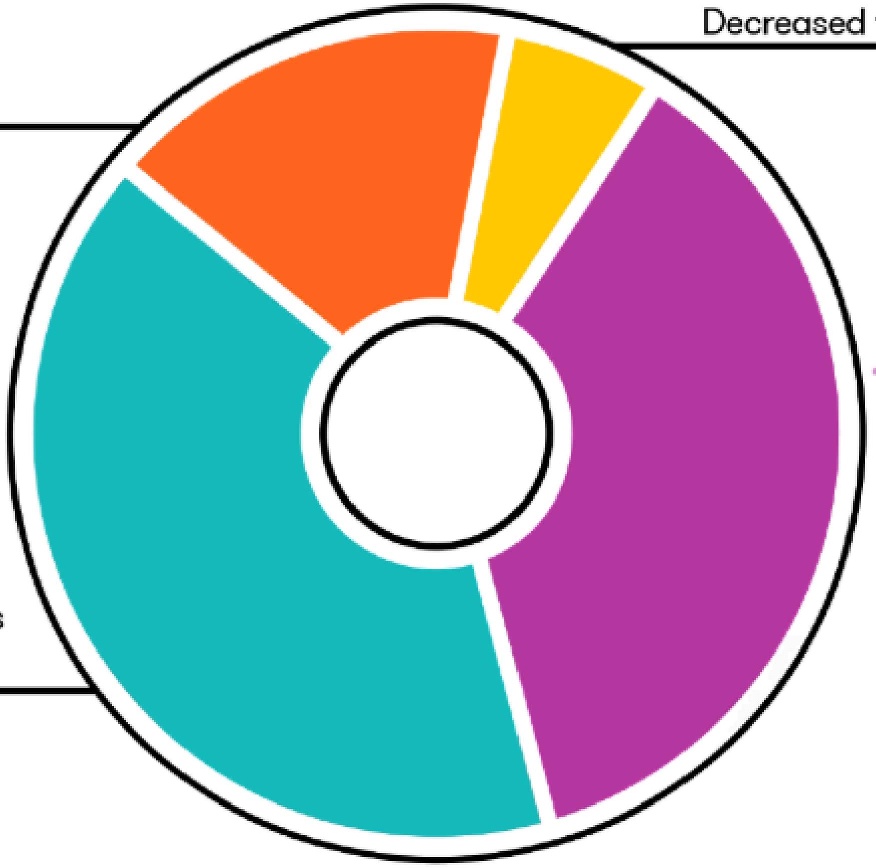
How marketers planned their 2025 social media budgets



Decreased their budgets
6%

Didn't know
18%

Kept their budgets the same
39.5%

36.5% of respondents planned to increase their social budgets in 2025

We asked over 1,000 marketing professionals around the world about the ins and outs of their strategies and workflows. See how yours measure up.

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POPULATION ESSENTIALS

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POPULATION ESSENTIALS

DEMOGRAPHICS AND OTHER KEY INDICATORS

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TOTAL POPULATION	FEMALE POPULATION	MALE POPULATION	YEAR-ON-YEAR CHANGE IN TOTAL POPULATION	MEDIAN AGE OF THE POPULATION
101 MILLION	51.0%	49.0%	+0.6% +625 THOUSAND	33.4

URBAN POPULATION	POPULATION DENSITY (PEOPLE PER KM²)	OVERALL LITERACY (ADULTS AGED 15+)	FEMALE LITERACY (ADULTS AGED 15+)	MALE LITERACY (ADULTS AGED 15+)
40.5%	324.2	96.0%	95.0%	97.0%

SOURCES: KEPIOS ANALYSIS; UNITED NATIONS; LOCAL GOVERNMENT AUTHORITIES; WORLD BANK; UNESCO; CIA WORLD FACTBOOK; OUR WORLD IN DATA; INDEXMUNDI; KNOEMA. ALL VALUES REFLECT THE LATEST AVAILABLE DATA, BUT VALUES MAY NOT ALL BE FROM THE SAME PERIOD.

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POPULATION OVER TIME

TOTAL POPULATION AND YEAR-ON-YEAR CHANGE

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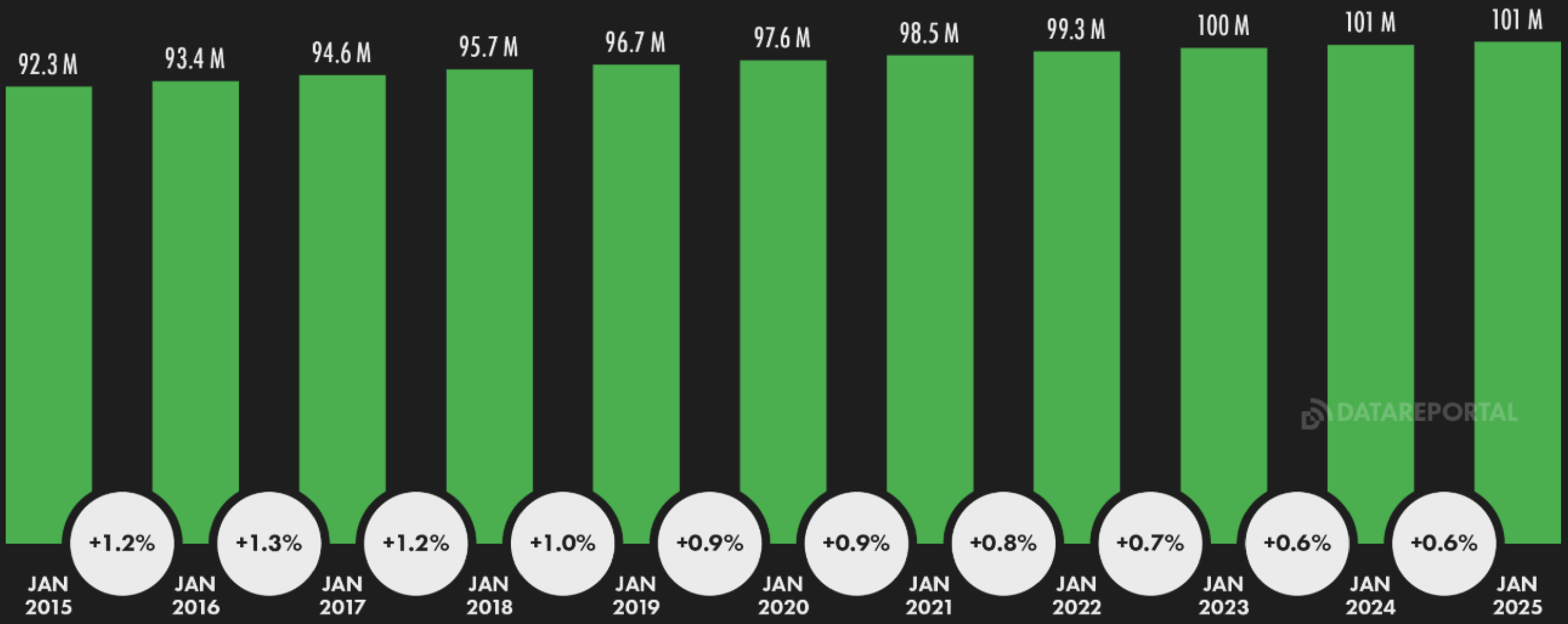

SOURCES: UNITED NATIONS; KEPIOS ANALYSIS. **NOTE:** WHERE LETTERS ARE SHOWN NEXT TO FIGURES ABOVE BARS, "K" DENOTES THOUSANDS (E.G. "123 K" = 123,000), "M" DENOTES MILLIONS (E.G. "1.23 M" = 1,230,000), AND "B" DENOTES BILLIONS (E.G. "1.23 B" = 1,230,000,000). WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. **COMPARABILITY:** BASE REVISIONS. FIGURES MAY NOT CORRELATE WITH VALUES PUBLISHED IN OUR PREVIOUS REPORTS.

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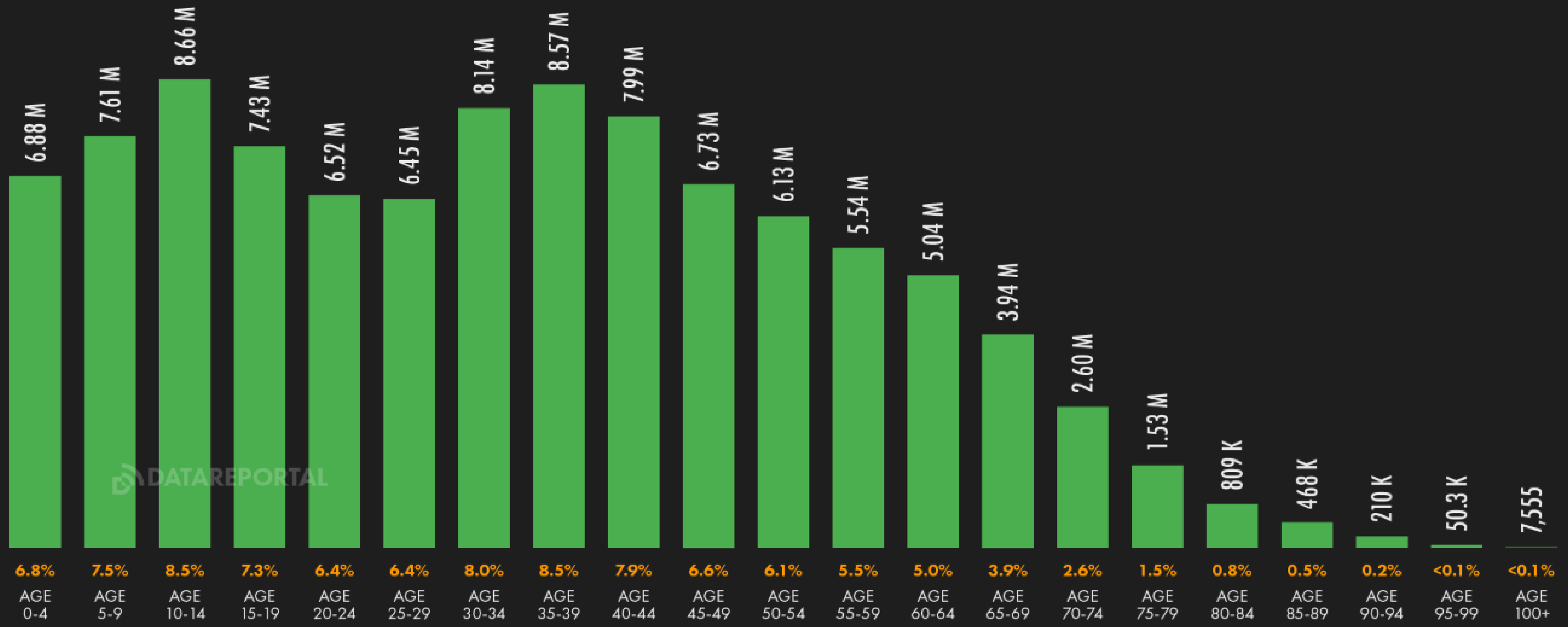
AGE DISTRIBUTION OF THE POPULATION

THE NUMBER OF PEOPLE IN EACH AGE GROUP, AND THE AGE GROUP'S ASSOCIATED SHARE OF THE TOTAL POPULATION

VIETNAM



SOURCES: EXTRAPOLATIONS OF DATA PUBLISHED BY THE UNITED NATIONS AND LOCAL GOVERNMENT AUTHORITIES. **NOTES:** PERCENTAGE VALUES BELOW EACH BAR REPRESENT THE RESPECTIVE AGE GROUP'S SHARE OF THE TOTAL POPULATION. WHERE LETTERS ARE SHOWN NEXT TO FIGURES ABOVE BARS, "K" DENOTES THOUSANDS (E.G. "123 K" = 123,000), "M" DENOTES MILLIONS (E.G. "1.23 M" = 1,230,000), AND "B" DENOTES BILLIONS (E.G. "1.23 B" = 1,230,000,000). WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. **COMPARABILITY:** BASE REVISIONS. FIGURES MAY NOT CORRELATE WITH VALUES PUBLISHED IN OUR PREVIOUS REPORTS.

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FINANCIAL AND DEVELOPMENTAL INDICATORS

WORLD BANK INDICATORS FOR FINANCIAL DEVELOPMENT, ACCESS TO ESSENTIAL SERVICES, AND DEVICE OWNERSHIP

VIETNAM

GROSS DOMESTIC PRODUCT (CURRENT U.S. DOLLARS)	$468 BILLION
GROSS DOMESTIC PRODUCT (PPP; CURRENT INTERNATIONAL DOLLARS)	$1.63 TRILLION
GROSS DOMESTIC PRODUCT PER CAPITA (CURRENT U.S. DOLLARS)	$4,649
GROSS DOMESTIC PRODUCT PER CAPITA (PPP; CURRENT INTERNATIONAL DOLLARS)	$16.2 THOUSAND
NET NATIONAL INCOME PER CAPITA (CURRENT U.S. DOLLARS)	$2,992
PERCENTAGE OF THE POPULATION EARNING LESS THAN $3.65 (2017, PPP) PER DAY	4.2%
PERCENTAGE OF THE POPULATION USING AT LEAST BASIC DRINKING WATER SERVICES	98.0%
PERCENTAGE OF THE POPULATION USING AT LEAST BASIC SANITATION SERVICES	92.2%
PERCENTAGE OF THE POPULATION WITH ACCESS TO ELECTRICITY	100%
PERCENTAGE OF THE POPULATION THAT OWNS A MOBILE PHONE (ANY TYPE)	95.7%

SOURCES: IMF; WORLD BANK (BOTH LATEST PUBLISHED DATA UP TO 2024). **DEFINITIONS:** "$3.65 (2017, PPP)": REFLECTS LOCAL "PURCHASING POWER PARITY", BASED ON THE WORLD BANK'S 2017 EXCHANGE BENCHMARK. "BASIC DRINKING WATER": PERCENTAGE OF THE TOTAL POPULATION THAT DRINKS WATER FROM AN IMPROVED SOURCE, PROVIDED COLLECTION TIME IS NOT MORE THAN 30 MINUTES FOR A ROUND TRIP. "BASIC SANITATION": PERCENTAGE OF THE TOTAL POPULATION USING IMPROVED SANITATION FACILITIES THAT ARE NOT SHARED WITH OTHER HOUSEHOLDS. **COMPARABILITY:** FIGURES USE LATEST PUBLISHED VALUES UP TO 2024; DATA MAY NOT ALL BE FROM THE SAME YEAR. VALUE FOR MOBILE PHONE OWNERSHIP MAY NOT MATCH VALUES SHOWN ELSEWHERE IN THIS REPORT.

MEDIA & DEVICES

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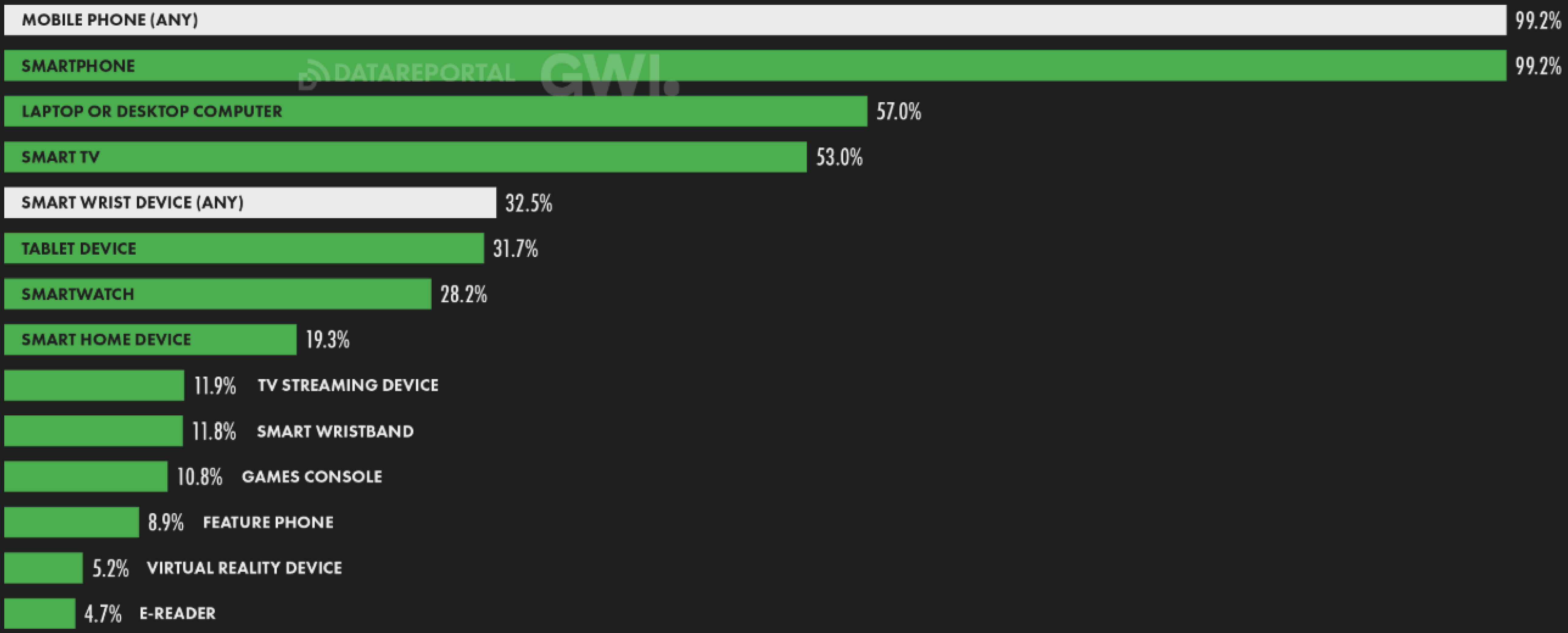
DEVICE OWNERSHIP

PERCENTAGE OF INTERNET USERS AGED 16+ WHO OWN EACH KIND OF DEVICE

VIETNAM



SOURCE: GWI (Q3 2024). **NOTE:** WHITE BARS IDENTIFY THE USE OF A COMBINATION OF DEVICES THAT ARE ALSO SHOWN INDIVIDUALLY ON THIS CHART. FOR EXAMPLE, "MOBILE PHONE (ANY)" REPRESENTS OWNERSHIP OF A "SMARTPHONE" AND / OR A "FEATURE PHONE". **COMPARABILITY:** CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

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MEDIA USE

THE PERCENTAGE OF INTERNET USERS AGED 16+ WHO CONSUME EACH MEDIA TYPE

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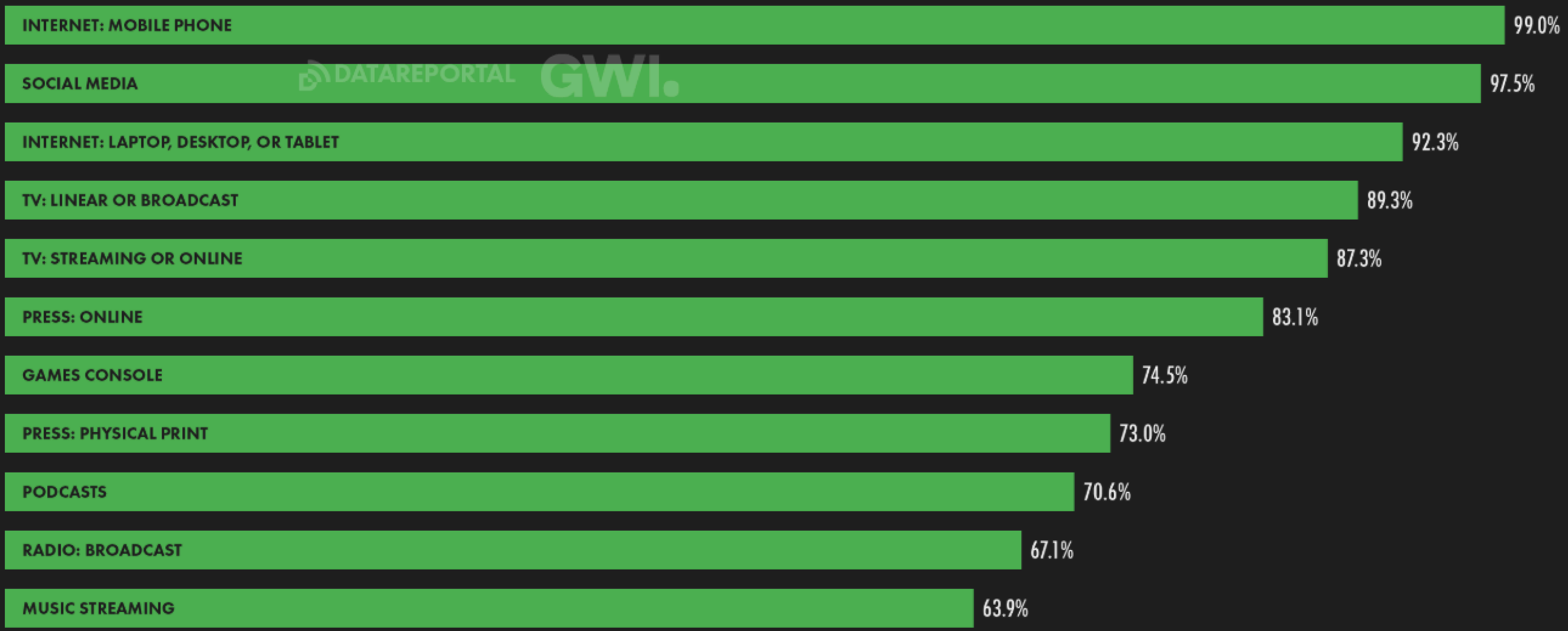

SOURCE: GWI (Q3 2024). **COMPARABILITY:** CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA. **POTENTIAL MISMATCHES:** THE VALUES SHOWN HERE ARE BASED ON THE TIME THAT PEOPLE SAY THEY SPEND CONSUMING EACH MEDIA TYPE, AND MAY DIFFER FROM SIMILAR DATA POINTS SHOWN ELSEWHERE IN THIS REPORT THAT REFLECT OTHER BEHAVIOURS SUCH AS USE OF DEVICES TO ACCESS THE INTERNET..

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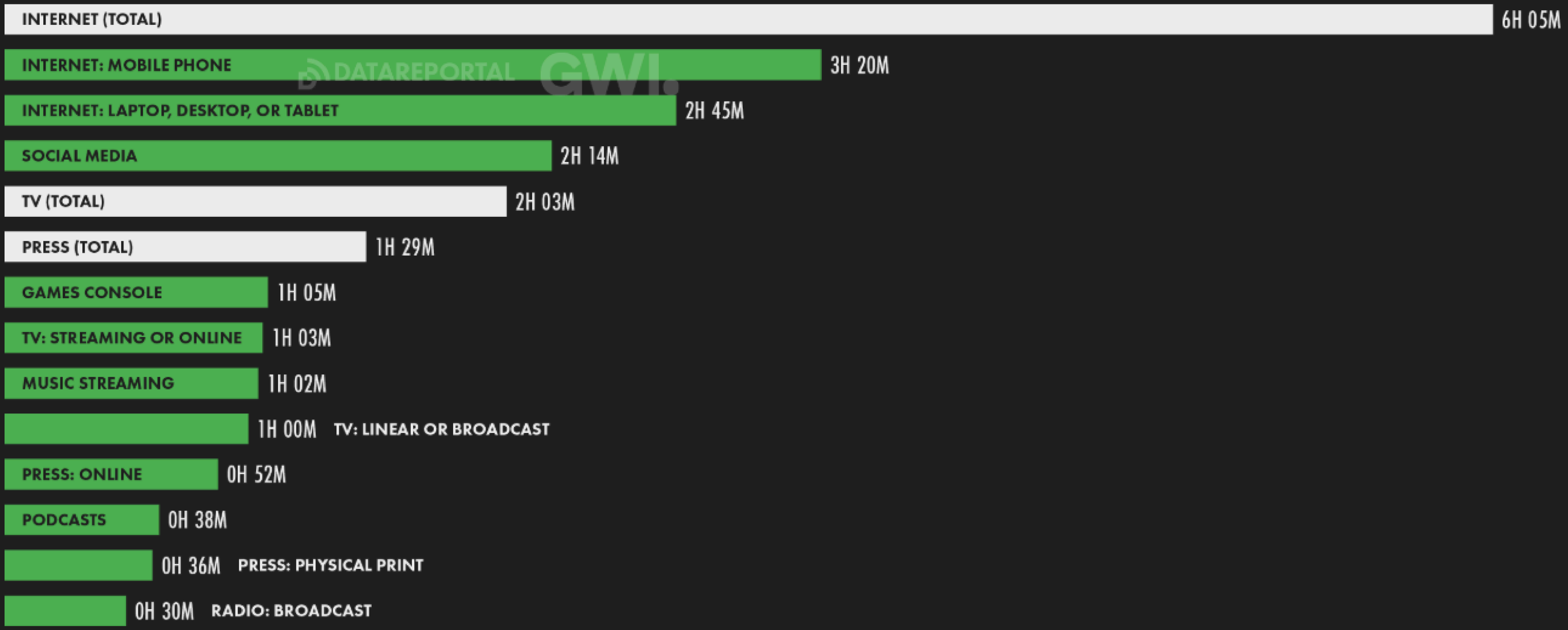
DAILY TIME SPENT WITH MEDIA

THE AVERAGE AMOUNT OF TIME (IN HOURS AND MINUTES) THAT INTERNET USERS AGED 16+ SPEND WITH EACH MEDIUM OR DEVICE EACH DAY

VIETNAM



SOURCE: GWI (Q3 2024). NOTES: PEOPLE MAY CONSUME DIFFERENT MEDIA CONCURRENTLY, AND SOME MEDIA SHOWN IN THIS CHART MAY APPEAR IN MORE THAN ONE BAR. FOR EXAMPLE, "SOCIAL MEDIA" APPEARS AS A STANDALONE MEDIUM, BUT IT IS ALSO A COMPONENT OF "INTERNET" TIME. WHITE BARS IDENTIFY THE USE OF A COMBINATION OF MEDIA OR DEVICES THAT ARE ALSO SHOWN INDIVIDUALLY ON THIS CHART. FOR EXAMPLE, "TV (TOTAL)" COMBINES THE VALUES FOR "TV: LINEAR OR BROADCAST" AND "TV: STREAMING OR ONLINE". COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

MOBILE CONNECTIVITY

USE OF MOBILE PHONES AND DEVICES THAT CONNECT TO CELLULAR NETWORKS

VIETNAM

NUMBER OF CELLULAR MOBILE CONNECTIONS (EXCLUDING IOT)	NUMBER OF CELLULAR MOBILE CONNECTIONS COMPARED WITH TOTAL POPULATION	YEAR-ON-YEAR CHANGE IN THE NUMBER OF CELLULAR MOBILE CONNECTIONS	SHARE OF CELLULAR MOBILE CONNECTIONS THAT ARE BROADBAND (3G, 4G, 5G)
127 MILLION	126%	+1.8% +2.2 MILLION	100%

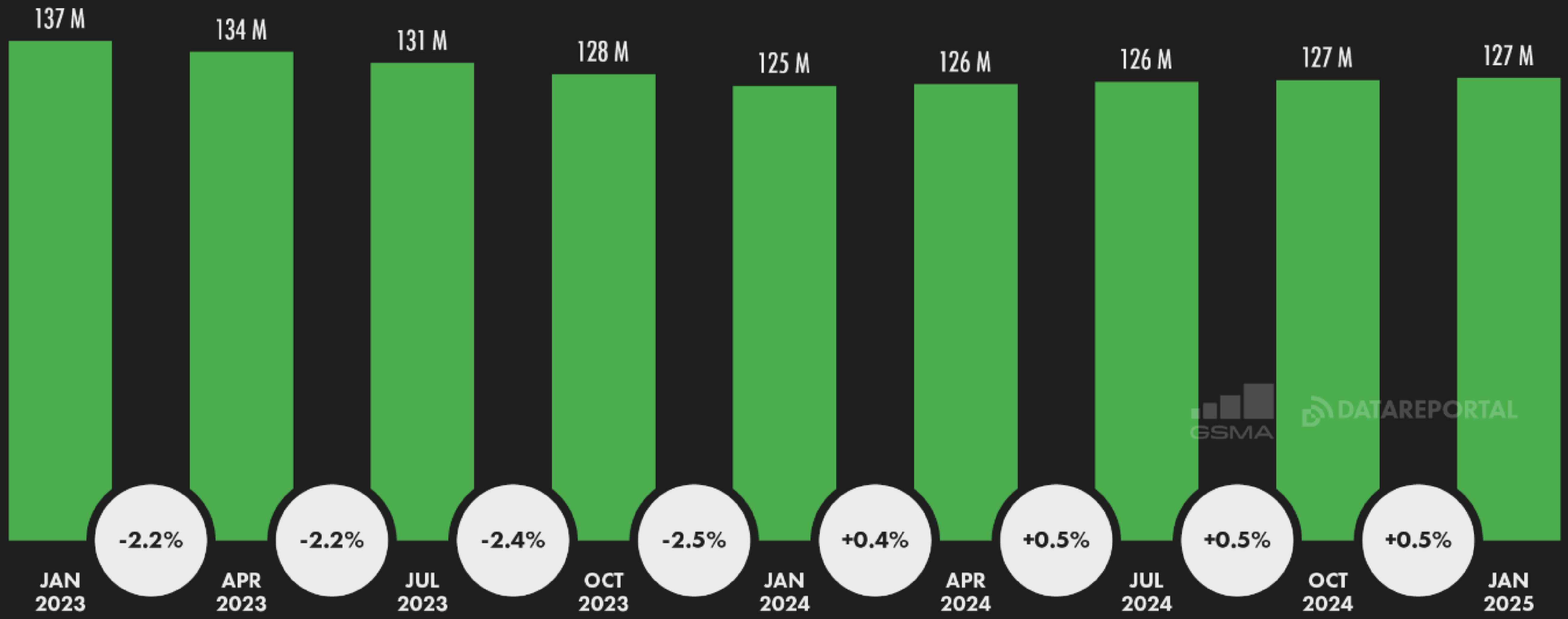
SOURCE: GSMA INTELLIGENCE. **NOTES:** TOTAL CELLULAR CONNECTIONS INCLUDE DEVICES OTHER THAN MOBILE PHONES, BUT EXCLUDE CELLULAR IOT CONNECTIONS. FIGURES MAY SIGNIFICANTLY EXCEED FIGURES FOR POPULATION DUE TO MULTIPLE CONNECTIONS AND CONNECTED DEVICES PER PERSON. **COMPARABILITY:** BASE CHANGES. VERSIONS OF THIS CHART PUBLISHED IN SOME OF OUR PREVIOUS REPORTS FEATURED CELLULAR CONNECTION FIGURES THAT INCLUDED CELLULAR IOT CONNECTIONS. FIGURES SHOWN HERE DO NOT INCLUDE CELLULAR IOT CONNECTIONS.

MEDIA & DEVICES

CELLULAR MOBILE CONNECTIONS OVER TIME

NUMBER OF CELLULAR MOBILE CONNECTIONS OVER TIME

VIETNAM



SOURCE: GSMA INTELLIGENCE. **NOTES:** EXCLUDES CELLULAR IOT CONNECTIONS. WHERE LETTERS ARE SHOWN NEXT TO FIGURES ABOVE BARS, "K" DENOTES THOUSANDS (E.G. "123 K" = 123,000), "M" DENOTES MILLIONS (E.G. "1.23 M" = 1,230,000), AND "B" DENOTES BILLIONS (E.G. "1.23 B" = 1,230,000,000). WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. **COMPARABILITY:** BASE CHANGES. SEE NOTES ON DATA.

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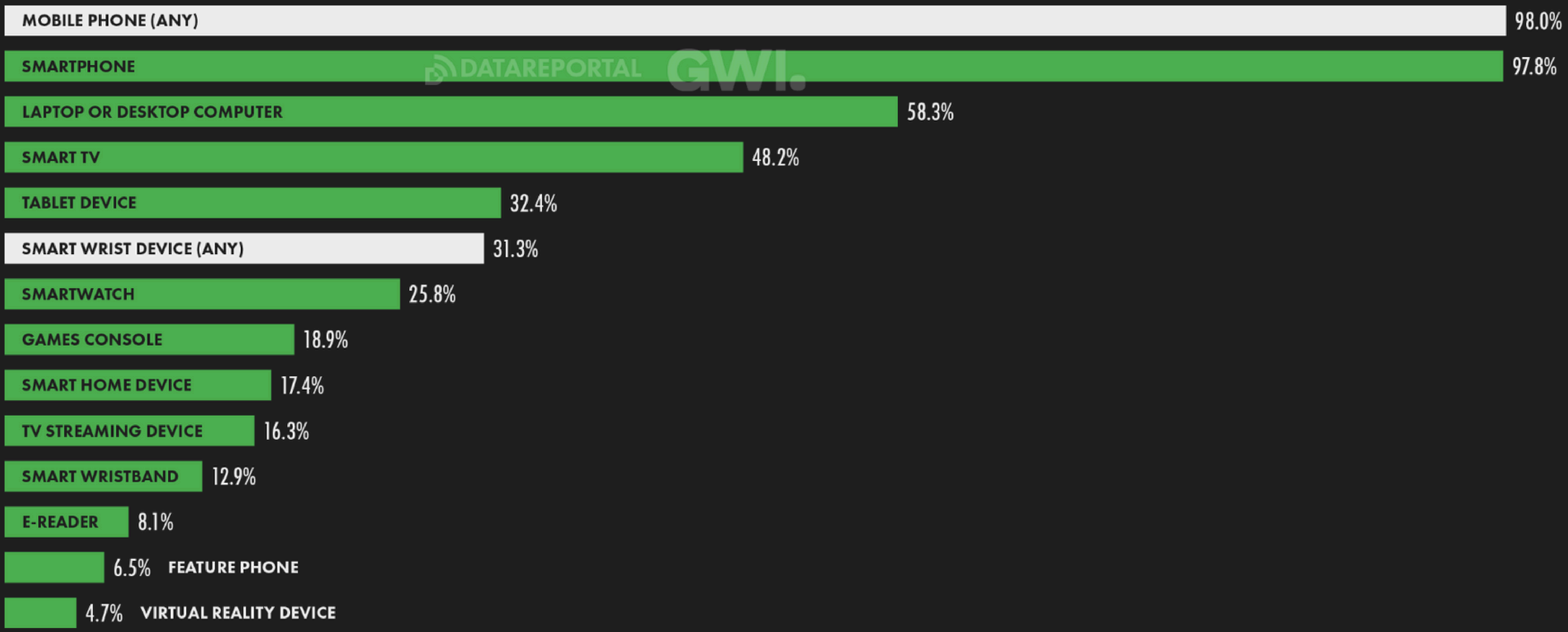
DEVICE OWNERSHIP

PERCENTAGE OF INTERNET USERS AGED 16+ WHO OWN EACH KIND OF DEVICE

GLOBAL OVERVIEW



SOURCE: GWI (Q3 2024). **NOTE:** WHITE BARS IDENTIFY THE USE OF A COMBINATION OF DEVICES THAT ARE ALSO SHOWN INDIVIDUALLY ON THIS CHART. FOR EXAMPLE, "MOBILE PHONE (ANY)" REPRESENTS OWNERSHIP OF A "SMARTPHONE" AND / OR A "FEATURE PHONE". **COMPARABILITY:** CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

INTERNET USE

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OVERVIEW OF INTERNET USE

ESSENTIAL INDICATORS OF INTERNET ADOPTION AND USE

VIETNAM

INDIVIDUALS USING THE INTERNET	INDIVIDUALS USING THE INTERNET vs. POPULATION	YEAR-ON-YEAR CHANGE IN TOTAL INTERNET USERS	YEAR-ON-YEAR CHANGE IN INTERNET USERS vs. POPULATION
79.8 MILLION	78.8%	+0.3% +223 THOUSAND	-0.3% -27 BPS

INDEXED SHARE OF GLOBAL INTERNET USERS vs. GLOBAL POPULATION SHARE	PERCENTAGE OF INTERNET USERS ACCESSING VIA MOBILE PHONES	AVERAGE DAILY TIME SPENT USING THE INTERNET	YEAR-ON-YEAR CHANGE IN DAILY TIME SPENT USING THE INTERNET
116.1	97.7%	6H 05M	-3.5% -13 MINS

SOURCES: KEPIOS ANALYSIS; ITU; GSMA INTELLIGENCE; EUROSTAT; GOOGLE'S ADVERTISING RESOURCES; CNNIC; KANTAR & IAMAI; GOVERNMENT RESOURCES; UNITED NATIONS. TIME SPENT AND MOBILE SHARE DATA FROM GWI (Q3 2024). **NOTES:** PERCENTAGE CHANGE FIGURES SHOW RELATIVE YEAR-ON-YEAR CHANGE. "BPS" FIGURES REPRESENT BASIS POINTS, AND SHOW ABSOLUTE YEAR-ON-YEAR CHANGE. **COMPARABILITY:** SOURCE AND BASE CHANGES. ALL FIGURES USE THE LATEST AVAILABLE DATA, BUT SOME SOURCES DO NOT PUBLISH REGULAR UPDATES, SO FIGURES MAY UNDER-REPRESENT ACTUAL USE. SEE NOTES ON DATA.

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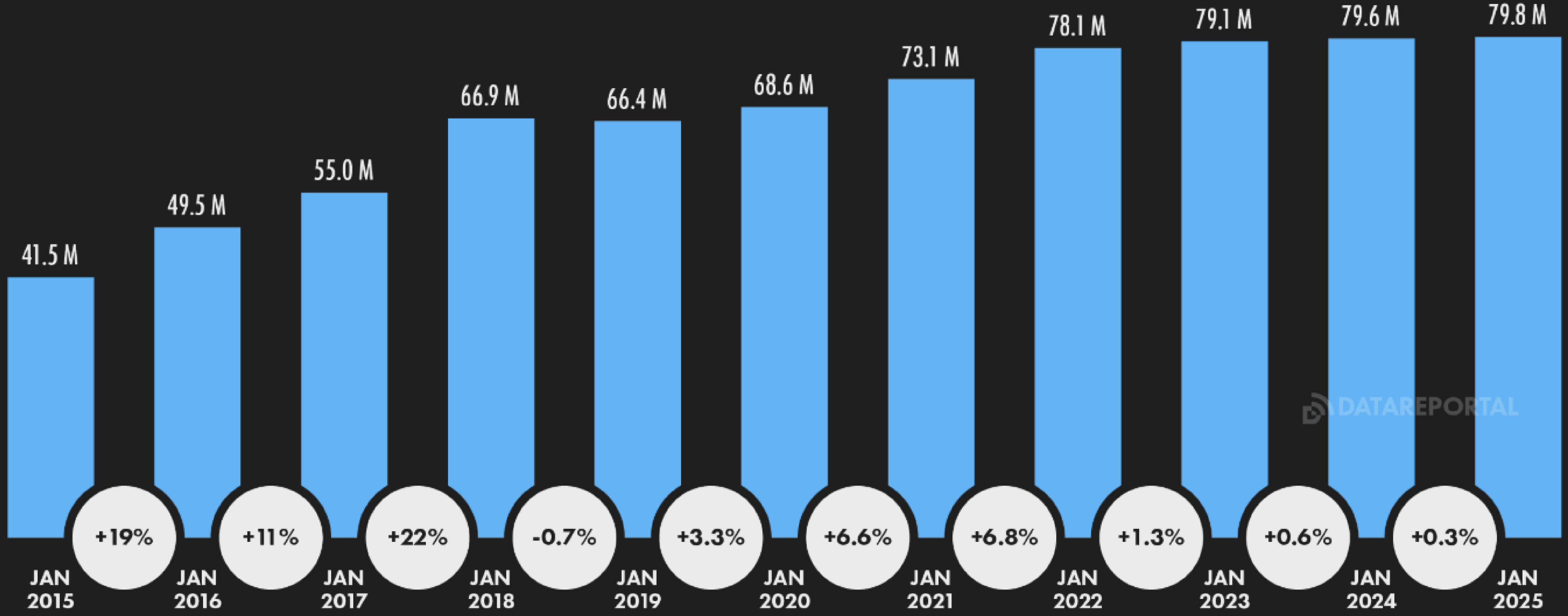
INTERNET USE OVER TIME (YOY)

NUMBER OF INDIVIDUALS USING THE INTERNET, AND YEAR-ON-YEAR CHANGE

VIETNAM



SOURCES: KEPIOS ANALYSIS; ITU; GSMA INTELLIGENCE; EUROSTAT; GOOGLE'S ADVERTISING RESOURCES; CNNIC; KANTAR & IAMAI; GOVERNMENT RESOURCES; UNITED NATIONS. **NOTE:** WHERE LETTERS ARE SHOWN NEXT TO FIGURES ABOVE BARS, "K" DENOTES THOUSANDS (E.G. "123 K" = 123,000), "M" DENOTES MILLIONS (E.G. "1.23 M" = 1,230,000), AND "B" DENOTES BILLIONS (E.G. "1.23 B" = 1,230,000,000). WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. **COMPARABILITY:** SOURCE AND BASE CHANGES. ALL FIGURES USE THE LATEST AVAILABLE DATA, BUT SOME SOURCES DO NOT PUBLISH REGULAR UPDATES, SO FIGURES FOR RECENT PERIODS MAY UNDER-REPRESENT ACTUAL USE. SEE NOTES ON DATA.

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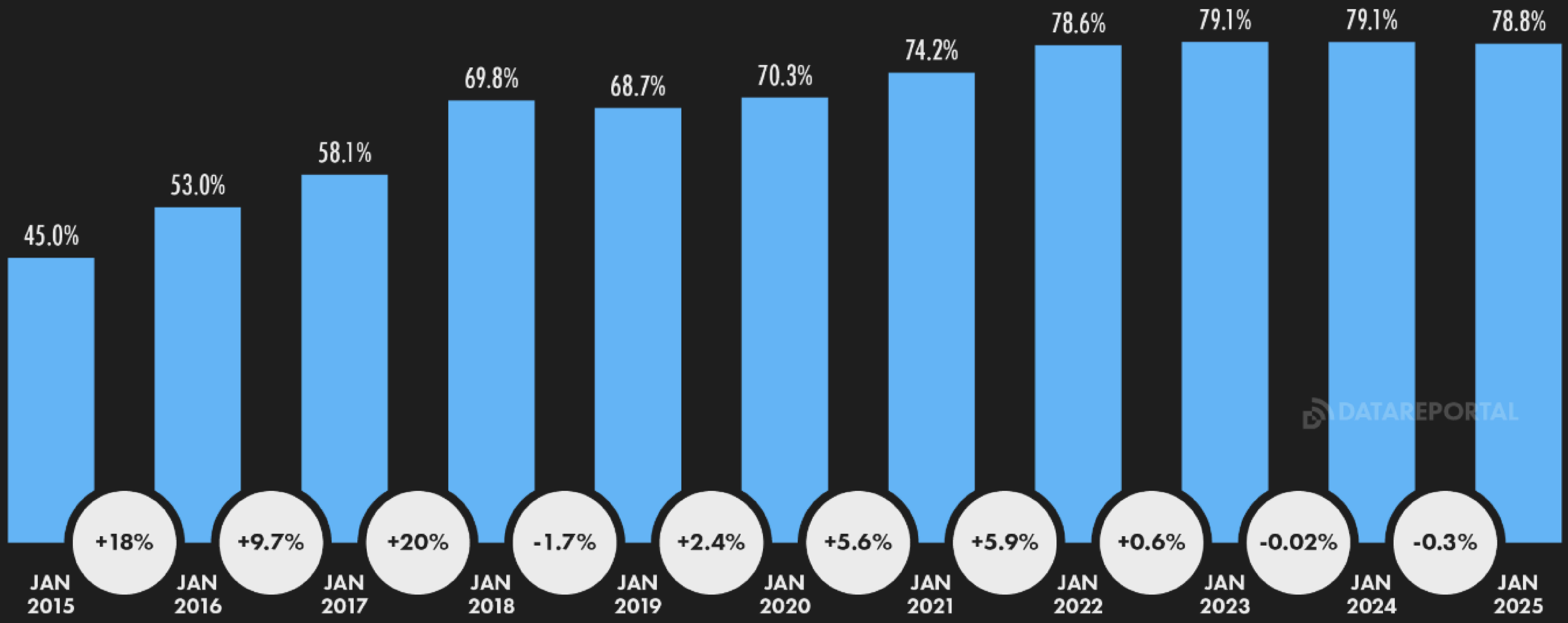
2025

INTERNET ADOPTION RATE OVER TIME (YOY)

NUMBER OF INDIVIDUALS USING THE INTERNET AS A PERCENTAGE OF TOTAL POPULATION, AND YEAR-ON-YEAR RELATIVE CHANGE

VIETNAM



SOURCES: KEPIOS ANALYSIS; ITU; GSMA INTELLIGENCE; EUROSTAT; GOOGLE'S ADVERTISING RESOURCES; CNNIC; KANTAR & IAMAI; GOVERNMENT RESOURCES; UNITED NATIONS. **NOTES:** PERCENTAGES IN THE WHITE CIRCLES SHOW THE RELATIVE CHANGE IN INTERNET ADOPTION vs. THE PREVIOUS PERIOD (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). **COMPARABILITY:** SOURCE AND BASE CHANGES. ALL FIGURES USE THE LATEST AVAILABLE DATA, BUT SOME SOURCES DO NOT PUBLISH REGULAR UPDATES, SO FIGURES FOR RECENT PERIODS MAY UNDER-REPRESENT ACTUAL ADOPTION. SEE NOTES ON DATA.

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INTERNET USER PERSPECTIVES

INTERNET USER NUMBERS PUBLISHED BY DIFFERENT SOURCES

VIETNAM

INTERNET USERS: KEPIOS	INTERNET USERS: ITU	INTERNET USERS: CIA WORLD FACTBOOK
79.8 MILLION	79.1 MILLION	75.0 MILLION
vs. POPULATION 78.8%	vs. POPULATION 78.1%	vs. POPULATION 74.0%

SOURCES: AS STATED ABOVE EACH ICON. **NOTES:** WHERE SOURCES PUBLISH INTERNET ADOPTION AS A PERCENTAGE (I.E. PENETRATION), WE COMPARE THE LATEST PUBLISHED ADOPTION RATES WITH THE LATEST FIGURES FOR POPULATION TO DERIVE ABSOLUTE USER NUMBERS. WHERE SOURCES PUBLISH ABSOLUTE USER NUMBERS, WE COMPARE THESE ABSOLUTE USER FIGURES WITH THE LATEST FIGURES FOR POPULATION TO DERIVE VALUES FOR "vs. POPULATION". KEPIOS CAPS INTERNET ADOPTION AT 99% OF THE TOTAL POPULATION. **COMPARABILITY:** POTENTIAL MISMATCHES. INTERNET USER FIGURES QUOTED ELSEWHERE IN THIS REPORT USE DATA FROM MULTIPLE SOURCES, INCLUDING SOURCES NOT FEATURED ON THIS SLIDE.

DAILY TIME SPENT USING THE INTERNET

AMOUNT OF TIME THAT INTERNET USERS AGED 16+ SPEND USING THE INTERNET EACH DAY

VIETNAM

DAILY TIME SPENT USING THE INTERNET ACROSS ALL DEVICES	TIME SPENT USING THE INTERNET ON MOBILE PHONES	TIME SPENT USING THE INTERNET ON COMPUTERS AND TABLETS	MOBILE'S SHARE OF TOTAL DAILY INTERNET TIME
6H 05M	3H 20M	2H 45M	54.9%

SOURCE: GWI (Q3 2024). COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

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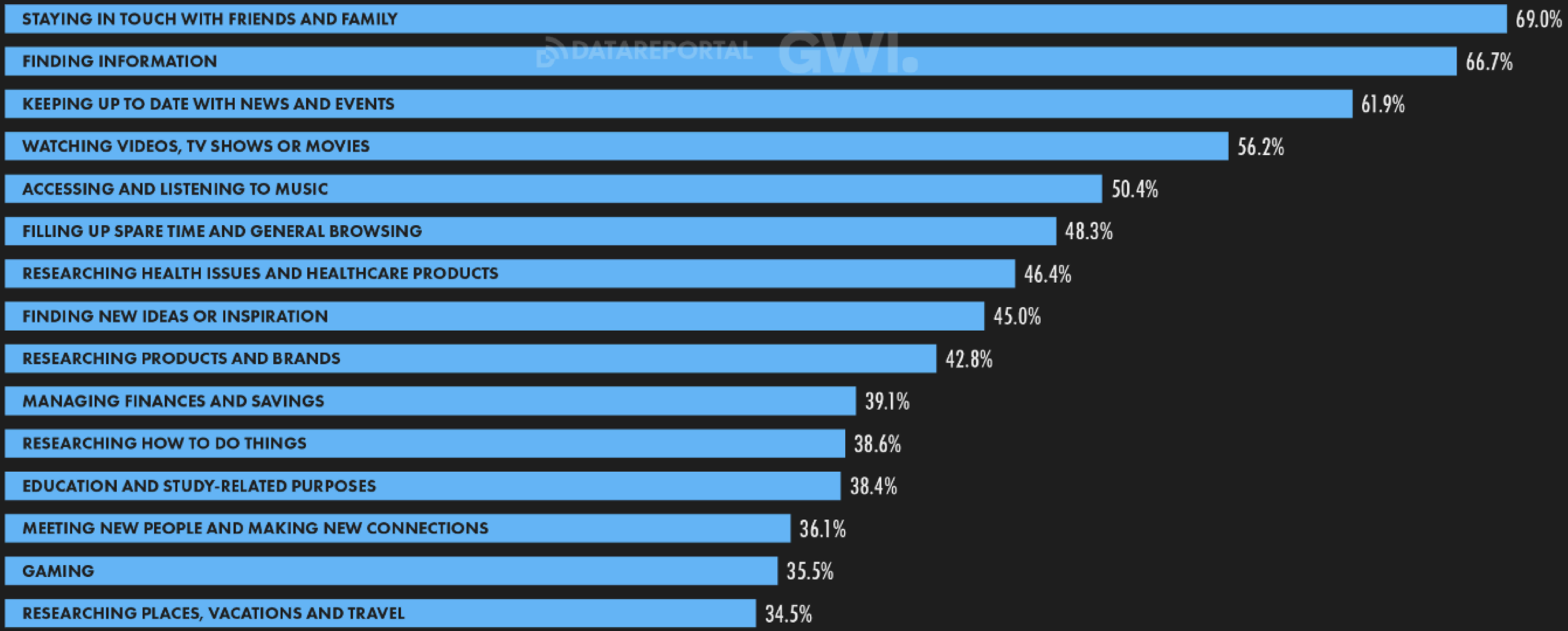
MAIN REASONS FOR USING THE INTERNET

PRIMARY REASONS WHY INTERNET USERS AGED 16+ USE THE INTERNET

VIETNAM



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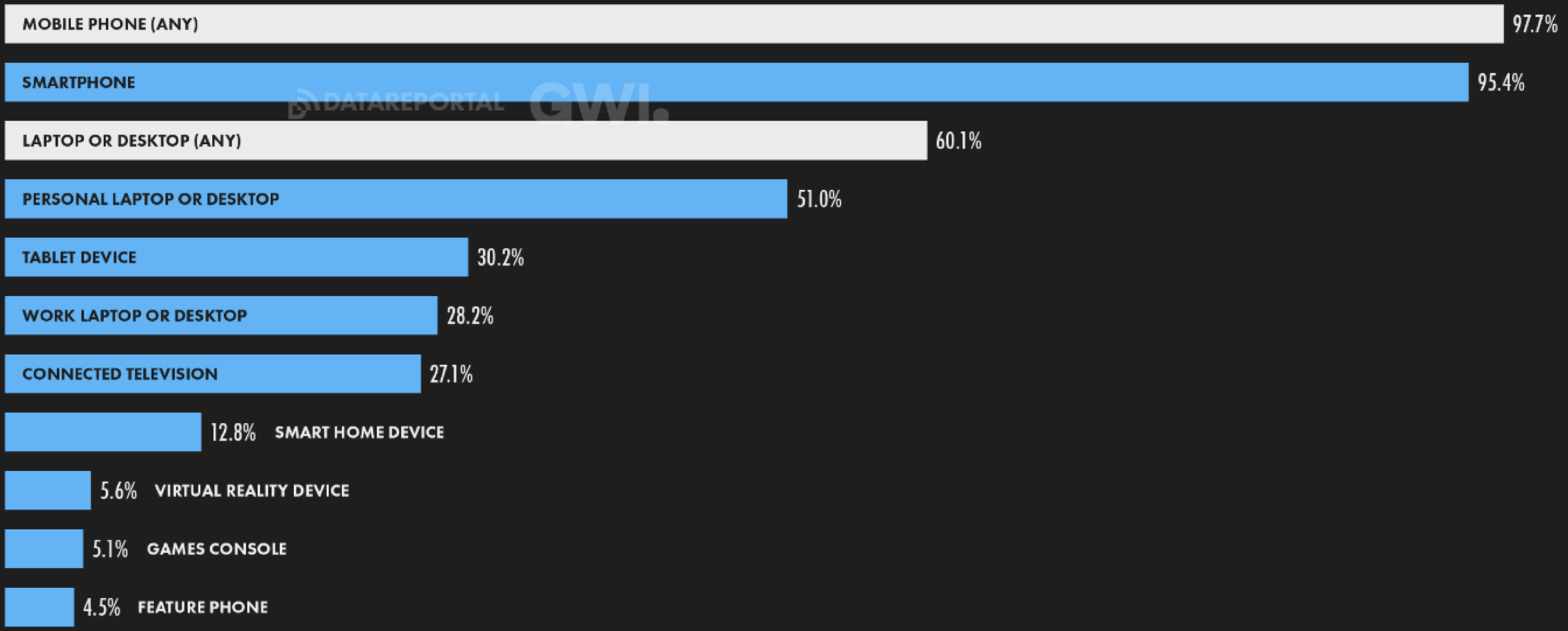
DEVICES USED TO ACCESS THE INTERNET

PERCENTAGE OF INTERNET USERS AGED 16+ WHO USE EACH KIND OF DEVICE TO ACCESS THE INTERNET

VIETNAM



SOURCE: GWI (Q3 2024). **NOTE:** WHITE BARS IDENTIFY THE USE OF A COMBINATION OF DEVICES THAT ARE ALSO SHOWN INDIVIDUALLY ON THIS CHART. FOR EXAMPLE, "MOBILE PHONE (ANY)" SHOWS THE USE OF A "SMARTPHONE" AND / OR A "FEATURE PHONE". **COMPARABILITY:** CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

INTERNET CONNECTION SPEEDS

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MEDIAN SPEEDS AND LATENCY FOR MOBILE AND FIXED INTERNET CONNECTIONS

VIETNAM

MEDIAN SPEED OF MOBILE INTERNET CONNECTIONS	YEAR-ON-YEAR CHANGE IN MEDIAN SPEED OF MOBILE INTERNET CONNECTIONS	MEDIAN SPEED OF FIXED INTERNET CONNECTIONS	YEAR-ON-YEAR CHANGE IN MEDIAN SPEED OF FIXED INTERNET CONNECTIONS
DOWNLOAD (MBPS) 75.72	▲ DOWNLOAD +60.9%	DOWNLOAD (MBPS) 153.99	▲ DOWNLOAD +46.6%
UPLOAD (MBPS) 23.23	▲ UPLOAD +19.1%	UPLOAD (MBPS) 127.84	▲ UPLOAD +26.7%
LATENCY (MS) 21	▲ LATENCY -8.7%	LATENCY (MS) 3	▲ LATENCY 0%

SOURCE: OOKLA. **NOTES:** FIGURES REPRESENT MEDIAN DOWNLOAD AND UPLOAD SPEEDS IN MEGABITS PER SECOND, AND MEDIAN CONNECTION LATENCY IN MILLISECONDS, FOR THE THREE-MONTH PERIOD ENDING IN NOVEMBER 2024. VALUES DENOTED BY "▲" SHOW YEAR-ON-YEAR CHANGE. **GUIDANCE:** A NEGATIVE VALUE FOR YEAR-ON-YEAR CHANGE IN LATENCY REPRESENTS AN IMPROVEMENT, BECAUSE LOWER LATENCY SHOULD RESULT IN FASTER CONTENT DELIVERY. **COMPARABILITY:** STARTING IN MAY 2024, VALUES REPRESENT ROLLING QUARTERLY AVERAGES. PRIOR TO MAY 2024, VALUES REPRESENTED SINGLE-MONTH AVERAGES.

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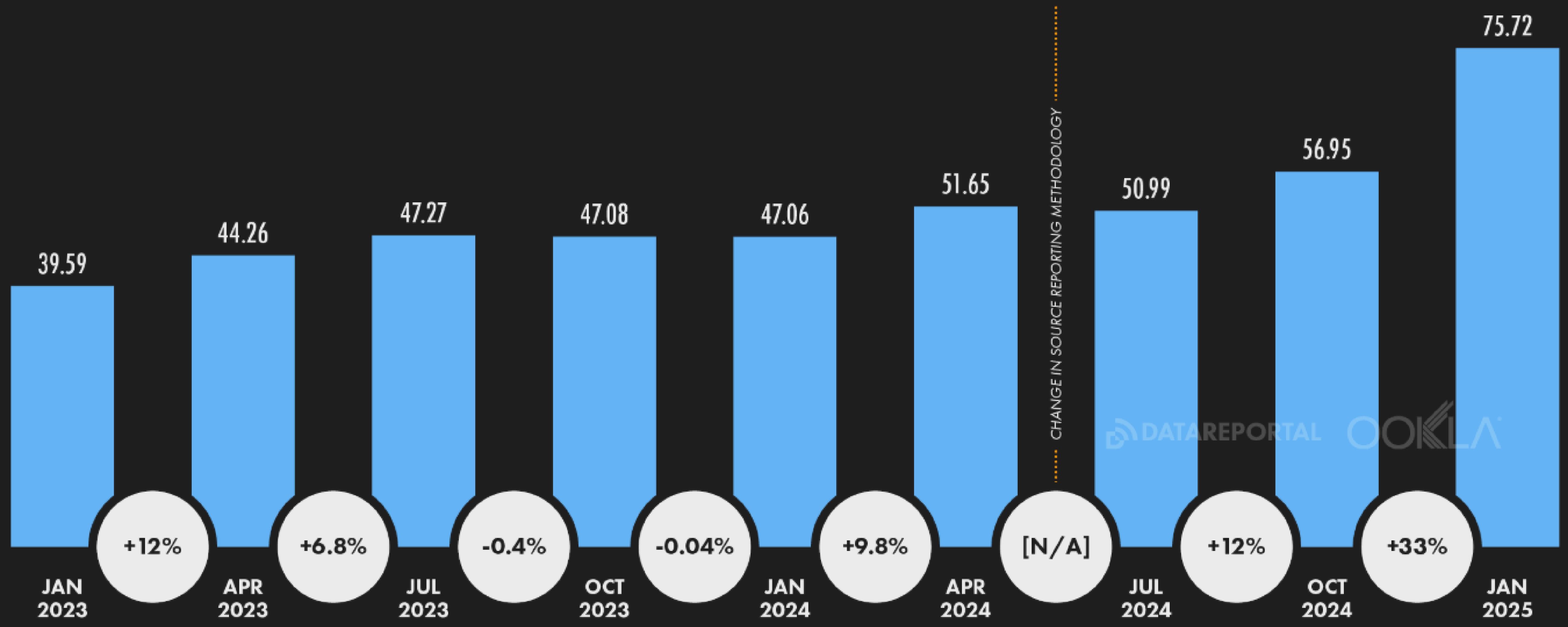
MOBILE INTERNET CONNECTION SPEEDS (QOQ)

MEDIAN DOWNLOAD SPEEDS FOR MOBILE INTERNET CONNECTIONS (IN MBPS)

VIETNAM

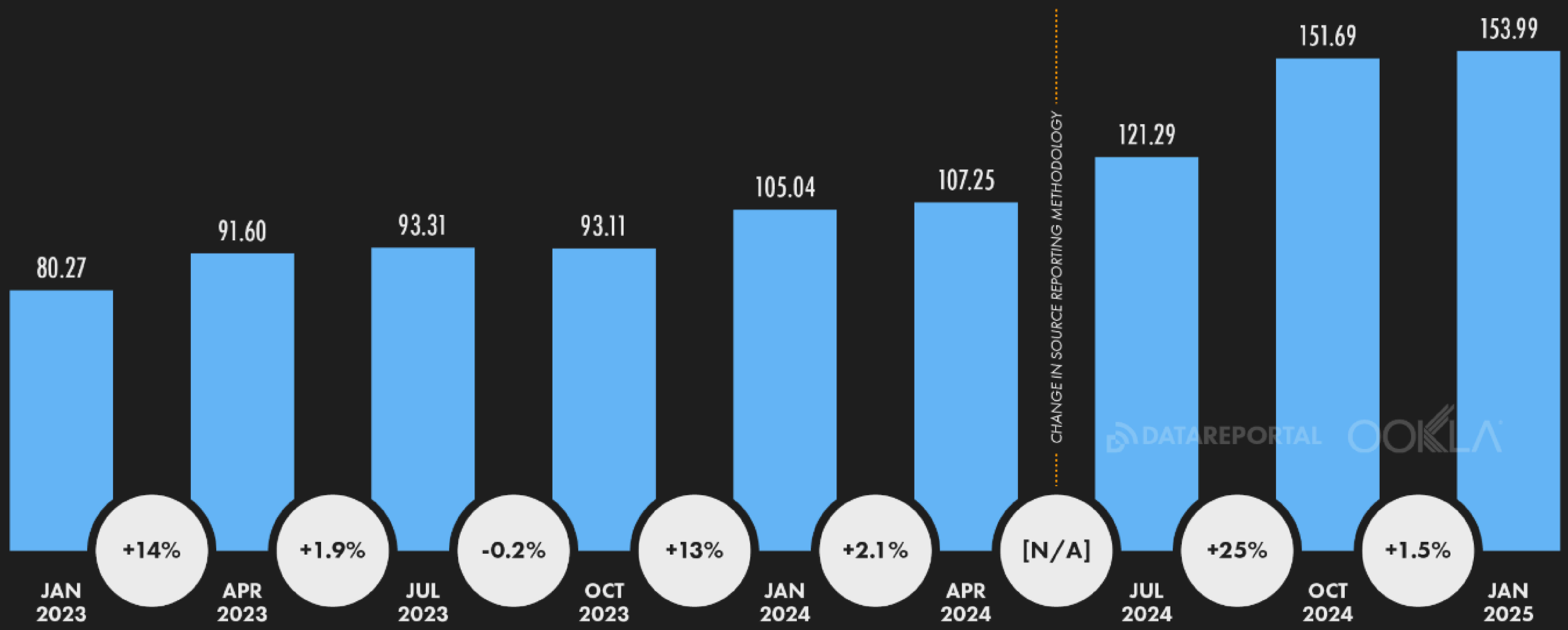


SOURCE: OOKLA. **NOTES:** FIGURES REPRESENT MEDIAN DOWNLOAD SPEEDS (IN MEGABITS PER SECOND). PERCENTAGE CHANGE VALUES SHOWN IN THE WHITE CIRCLES REPRESENT THE CHANGE BETWEEN STATED PERIODS. **COMPARABILITY:** STARTING IN MAY 2024, VALUES REPRESENT ROLLING QUARTERLY AVERAGES. PRIOR TO MAY 2024, VALUES REPRESENTED SINGLE-MONTH AVERAGES.

FIXED INTERNET CONNECTION SPEEDS (QOQ)

MEDIAN DOWNLOAD SPEEDS FOR FIXED INTERNET CONNECTIONS (IN MBPS)

VIETNAM



SOURCE: OOKLA. NOTES: FIGURES REPRESENT MEDIAN DOWNLOAD SPEEDS (IN MEGABITS PER SECOND). PERCENTAGE CHANGE VALUES SHOWN IN THE WHITE CIRCLES REPRESENT THE CHANGE BETWEEN STATED PERIODS. COMPARABILITY: STARTING IN MAY 2024, VALUES REPRESENT ROLLING QUARTERLY AVERAGES. PRIOR TO MAY 2024, VALUES REPRESENTED SINGLE-MONTH AVERAGES.

SHARE OF WEB TRAFFIC BY DEVICE

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PERCENTAGE OF TOTAL WEB PAGES SERVED TO WEB BROWSERS RUNNING ON EACH KIND OF DEVICE

VIETNAM

MOBILE PHONES	LAPTOP AND DESKTOP COMPUTERS	TABLET DEVICES	OTHER DEVICES
83.31%	15.09%	1.60%	0%
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
-1.3%	+6.9%	+11.1%	0%
-114 BPS	+98 BPS	+16 BPS	[UNCHANGED]

SOURCE: STATCOUNTER. **NOTES:** FIGURES REPRESENT THE NUMBER OF WEB PAGES SERVED TO BROWSERS RUNNING ON EACH TYPE OF DEVICE COMPARED WITH THE TOTAL NUMBER OF WEB PAGES SERVED TO BROWSERS RUNNING ON ANY DEVICE IN DECEMBER 2024. PERCENTAGE CHANGE VALUES REPRESENT RELATIVE CHANGE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE THE ABSOLUTE CHANGE. FIGURES MAY NOT SUM TO 100% DUE TO ROUNDING. WHERE VALUES SHOW AS "+▲", THE GROWTH VALUE DOES NOT FIT IN THE AVAILABLE SPACE. THIS IS TYPICALLY DUE TO CALCULATIONS INVOLVING GROWTH FROM A STARTING POINT OF ZERO OR NEAR ZERO.

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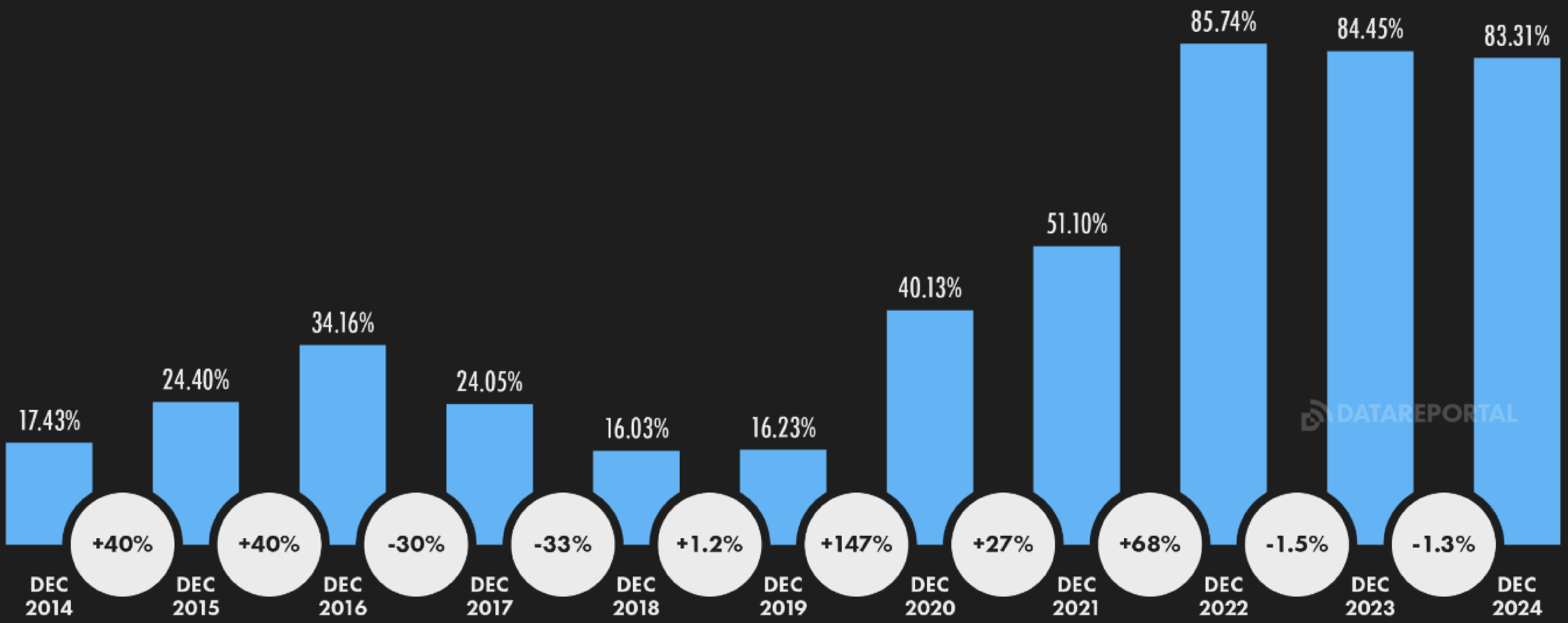
MOBILE'S SHARE OF WEB TRAFFIC (YOY)

SHARE OF TOTAL WEB TRAFFIC (PERCENTAGE OF WEB PAGE REQUESTS) ORIGINATING FROM WEB BROWSERS RUNNING ON MOBILE PHONES

VIETNAM



SOURCE: STATCOUNTER. **NOTES:** FIGURES REPRESENT THE NUMBER OF WEB PAGES SERVED TO WEB BROWSERS RUNNING ON MOBILE PHONES COMPARED WITH THE TOTAL NUMBER OF WEB PAGES SERVED TO WEB BROWSERS RUNNING ON ANY DEVICE. PERCENTAGE CHANGE VALUES IN THE WHITE CIRCLES REPRESENT RELATIVE CHANGE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%).

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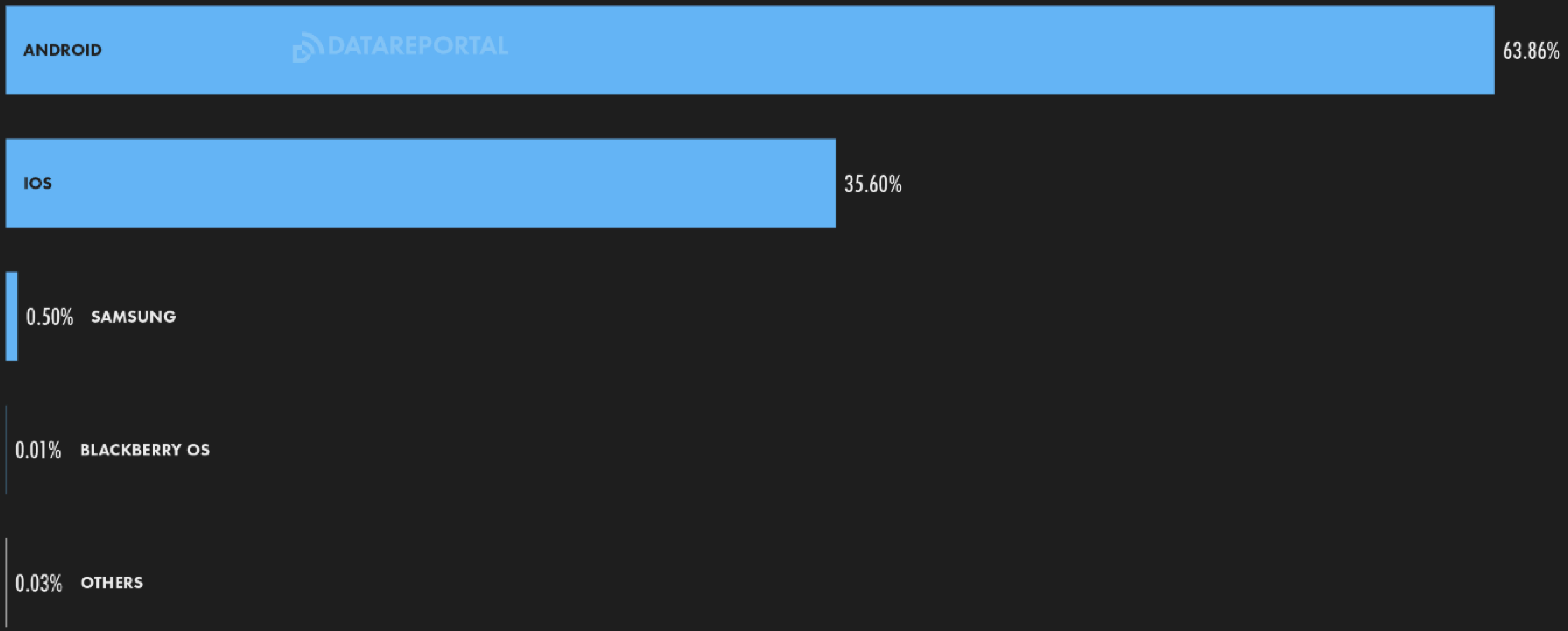
SHARE OF MOBILE WEB TRAFFIC BY MOBILE OS

PERCENTAGE OF WEB PAGE REQUESTS ORIGINATING FROM MOBILE HANDSETS RUNNING EACH MOBILE OPERATING SYSTEM IN DECEMBER 2024

VIETNAM



SOURCE: STATCOUNTER. **NOTES:** FIGURES REPRESENT THE NUMBER OF WEB PAGES SERVED TO BROWSERS ON MOBILE PHONES RUNNING EACH OPERATING SYSTEM COMPARED WITH THE TOTAL NUMBER OF WEB PAGES SERVED TO MOBILE BROWSERS IN DECEMBER 2024. 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. FIGURES MAY NOT SUM TO 100% DUE TO ROUNDING.

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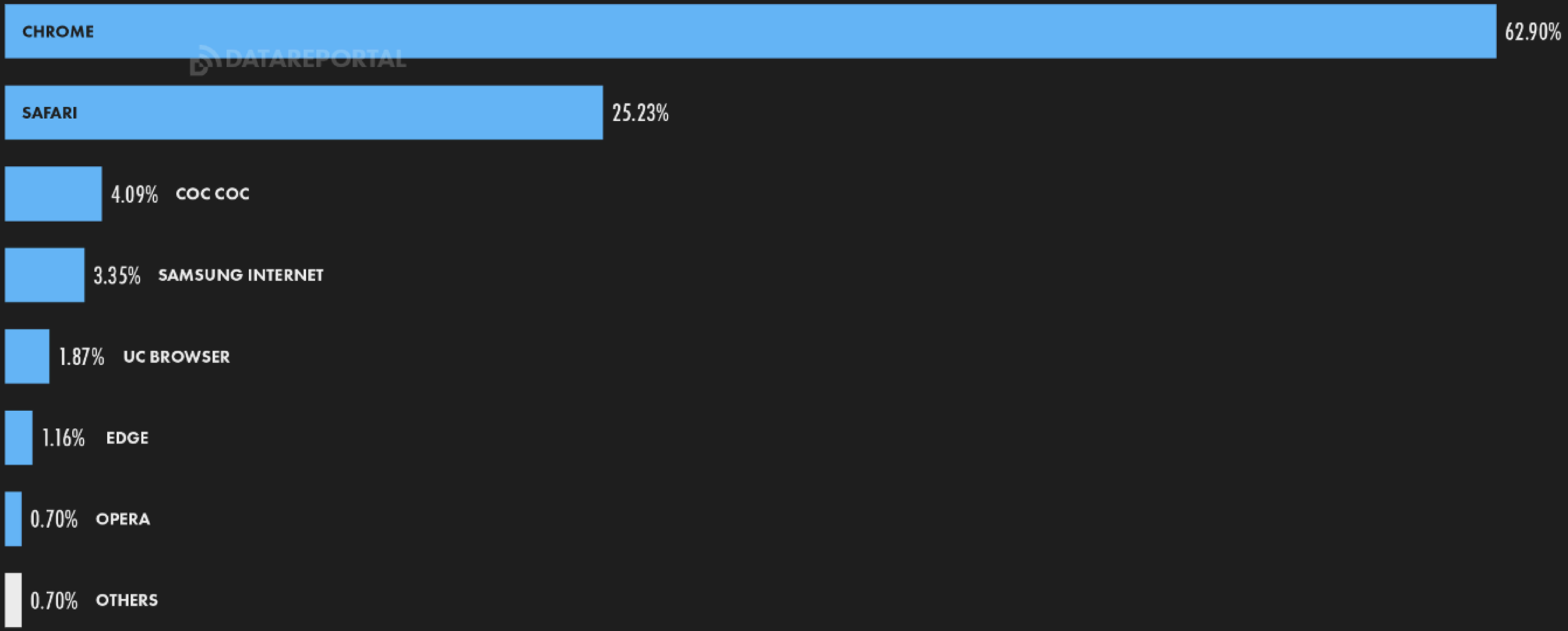
SHARE OF WEB TRAFFIC BY BROWSER

PERCENTAGE OF TOTAL WEB PAGES SERVED TO EACH BRAND OF WEB BROWSER RUNNING ON ANY DEVICE

VIETNAM



SOURCE: STATCOUNTER. **NOTES:** FIGURES REPRESENT THE NUMBER OF PAGE VIEWS SERVED TO EACH BROWSER AS A PERCENTAGE OF TOTAL PAGE VIEWS SERVED TO WEB BROWSERS RUNNING ON ANY KIND OF DEVICE IN DECEMBER 2024. FIGURES MAY NOT SUM TO 100% DUE TO ROUNDING.

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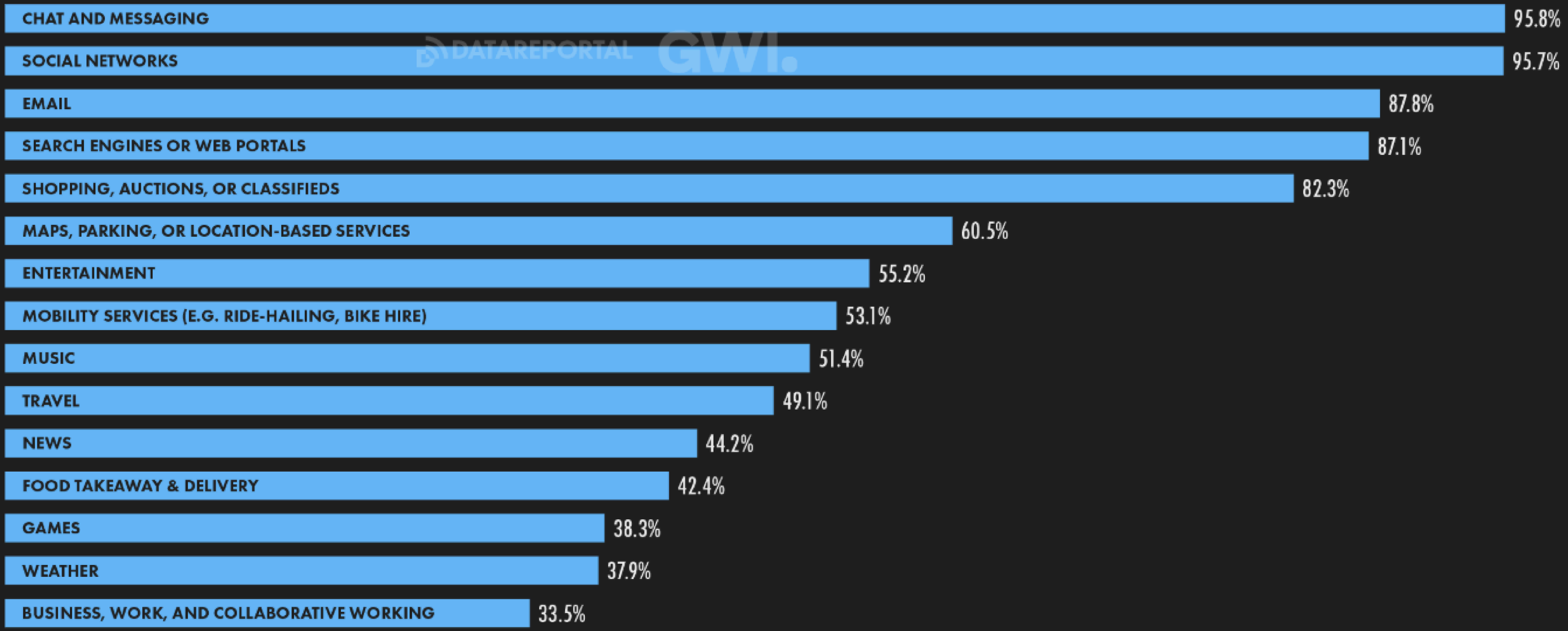
TOP TYPES OF WEBSITES VISITED AND APPS USED

PERCENTAGE OF INTERNET USERS AGED 16+ WHO HAVE VISITED OR USED EACH KIND OF DIGITAL PROPERTY IN THE PAST MONTH

VIETNAM



SOURCE: GWI (Q3 2024). **COMPARABILITY:** CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA. THE TREATMENT OF THE QUESTION USED TO INFORM THIS CHART CHANGED IN GWI'S Q4 2023 SURVEY, SO VALUES ARE NOT COMPARABLE WITH VALUES PUBLISHED IN PREVIOUS REPORTS.

TOP WEBSITES: SIMILARWEB RANKING

SIMILARWEB'S RANKING OF THE MOST VISITED WEBSITES, BASED ON WEBSITE TRAFFIC BETWEEN 01 SEPTEMBER AND 30 NOVEMBER 2024

VIETNAM

#	WEBSITE	TOTAL VISITS (MONTHLY AVE.)	UNIQUE VISITORS (MONTHLY AVE.)	AVERAGE TIME PER VISIT	AVERAGE PAGES PER VISIT
01	GOOGLE.COM	1.57 B	84.0 M	11M 07S	7.99
02	YOUTUBE.COM	537 M	22.9 M	21M 18S	12.45
03	FACEBOOK.COM	424 M	24.2 M	16M 48S	24.39
04	SHOPEE.VN	171 M	54.8 M	4M 47S	5.80
05	VNEXPRESS.NET	129 M	17.6 M	4M 52S	4.68
06	ZALO.ME	108 M	18.9 M	6M 25S	4.85
07	CHATGPT.COM	101 M	10.0 M	4M 54S	3.66
08	TRUYENQQTO.COM	88.7 M	4.49 M	20M 59S	9.24
09	VIETJACK.COM	75.0 M	16.9 M	9M 39S	3.93
10	24H.COM.VN	64.9 M	8.64 M	9M 57S	4.42

#	WEBSITE	TOTAL VISITS (MONTHLY AVE.)	UNIQUE VISITORS (MONTHLY AVE.)	AVERAGE TIME PER VISIT	AVERAGE PAGES PER VISIT
11	DANTRI.COM.VN	64.8 M	10.9 M	12M 24S	4.95
12	GOOGLE.COM.VN	59.7 M	7.50 M	5M 50S	5.45
13	BAOMOI.COM	58.2 M	14.9 M	7M 05S	5.49
14	THUVIENPHAPLUAT.VN	52.5 M	25.4 M	6M 28S	2.91
15	TIKTOK.COM	51.0 M	9.74 M	10M 15S	11.92
16	TUOITRE.VN	47.8 M	13.1 M	2M 56S	2.54
17	VIETNAMNET.VN	41.6 M	13.3 M	1M 58S	2.99
18	TRUYENFULL.IO	39.1 M	1.80 M	26M 45S	9.72
19	YAHOO.COM	37.9 M	4.01 M	8M 04S	4.58
20	WIKIPEDIA.ORG	37.9 M	11.2 M	3M 31S	2.83

SOURCE: SIMILARWEB. RANKING AND VALUES BASED ON TRAFFIC BETWEEN 01 SEPTEMBER AND 30 NOVEMBER 2024. **NOTES:** VALUES IN THE "UNIQUE VISITORS" COLUMN REPRESENT THE NUMBER OF DISTINCT 'IDENTITIES' ACCESSING EACH SITE, BUT MAY NOT REPRESENT UNIQUE INDIVIDUALS, AS SOME PEOPLE MAY USE MULTIPLE DEVICES OR BROWSERS. VALUES FOR "TOTAL VISITS" AND "UNIQUE VISITORS" REPRESENT MONTHLY AVERAGES. FIGURES ENDING IN "B" ARE IN BILLIONS; FIGURES ENDING IN "M" ARE IN MILLIONS; FIGURES ENDING IN "K" ARE IN THOUSANDS. TIME SHOWN IN MINUTES AND SECONDS. **ADVISORY:** SOME SITES FEATURED IN THIS RANKING MAY CONTAIN ADULT CONTENT, VIRUSES, MALWARE, OR OFFENSIVE CONTENT. READERS SHOULD AVOID VISITING UNKNOWN DOMAINS.

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TOP WEBSITES: SEMRUSH RANKING

SEMRUSH'S RANKING OF THE MOST VISITED WEBSITES, BASED ON WEBSITE TRAFFIC IN NOVEMBER 2024

VIETNAM

#	WEBSITE	TOTAL VISITS (MONTHLY AVE.)	UNIQUE VISITORS (MONTHLY AVE.)	AVERAGE TIME PER VISIT	AVERAGE PAGES PER VISIT
01	GOOGLE.COM	1.61B	80.5M	12M 39S	5.04
02	YOUTUBE.COM	997M	53.8M	22M 14S	6.65
03	FACEBOOK.COM	388M	38.5M	20M 31S	11.06
04	VNEXPRESS.NET	191M	15.4M	10M 10S	2.75
05	SHOPEE.VN	81.7M	24.5M	11M 15S	4.22
06	GOOGLE.COM.VN	80.4M	8.09M	8M 21S	4.12
07	ZALO.ME	79.7M	21.4M	14M 12S	2.26
08	24H.COM.VN	74.6M	8.41M	12M 06S	2.72
09	CHATGPT.COM	73.7M	8.25M	7M 45S	2.52
10	DANTRI.COM.VN	69.2M	9.31M	16M 40S	2.71
11	TRUYENFULL.IO	63.2M	3.14M	38M 07S	7.13
12	COCCOC.COM	53.9M	3.00M	15M 26S	3.02
13	TIKTOK.COM	51.0M	14.8M	14M 40S	10.78
14	KENH14.VN	49.8M	7.53M	7M 21S	2.34
15	VIETJACK.COM	49.4M	9.35M	14M 05S	3.29
16	WIKIPEDIA.ORG	48.2M	15.6M	9M 24S	2.33
17	THEGIOIDIDONG.COM	48.2M	18.1M	8M 20S	2.26
18	TUOITRE.VN	44.3M	8.39M	7M 22S	2.02
19	MSN.COM	40.6M	1.54M	21M 37S	4.10
20	THUVIENPHAPLUAT.VN	40.2M	13.4M	32M 08S	2.77

SOURCE: SEMRUSH. FIGURES REPRESENT TRAFFIC VALUES IN NOVEMBER 2024. NOTE: VALUES IN THE "UNIQUE VISITORS" COLUMN REPRESENT THE NUMBER OF DISTINCT 'IDENTITIES' ACCESSING EACH SITE, BUT MAY NOT REPRESENT UNIQUE INDIVIDUALS, AS SOME PEOPLE MAY USE MULTIPLE DEVICES OR BROWSERS. FIGURES ENDING IN "B" ARE IN BILLIONS; FIGURES ENDING IN "M" ARE IN MILLIONS; FIGURES ENDING IN "K" ARE IN THOUSANDS. TIME SHOWN IN MINUTES AND SECONDS. ADVISORY: SOME WEBSITES FEATURED IN THIS RANKING MAY CONTAIN ADULT CONTENT, VIRUSES, MALWARE, OR OFFENSIVE CONTENT. READERS SHOULD AVOID VISITING UNKNOWN DOMAINS. COMPARABILITY: SOURCE METHODOLOGY CHANGES.

FEB 2025

APP RANKING: MONTHLY ACTIVE USERS

MOBILE APPS AND GAMES RANKED BY AVERAGE MONTHLY ACTIVE USERS BETWEEN 01 SEPTEMBER 2024 AND 30 NOVEMBER 2024

VIETNAM

#	MOBILE APP	COMPANY
01	FACEBOOK	META
02	ZALO	VNG
03	YOUTUBE	GOOGLE
04	FACEBOOK MESSENGER	META
05	TIKTOK	BYTEDANCE
06	GOOGLE	GOOGLE
07	CHROME BROWSER	GOOGLE
08	SHOPEE	SEA
09	GOOGLE PLAY SERVICES	GOOGLE
10	GOOGLE MAPS	GOOGLE

#	MOBILE GAME	COMPANY
01	ARENA OF VALOR	SEA
02	FREE FIRE	SEA
03	ROBLOX	ROBLOX
04	PUBG MOBILE	TENCENT
05	MINECRAFT POCKET EDITION	MICROSOFT
06	TALKING TOM GOLD RUN	JINKE CULTURE - OUTFIT7
07	PLAY TOGETHER	HAEGIN
08	CHESS.COM	CHESS.COM
09	SUPREME DUELIST STICKMAN	NERON'S BROTHER
10	CANDY CRUSH SAGA	ACTIVISION BLIZZARD

SOURCE: DATA.AI (A SENSOR TOWER COMPANY). NOTES: RANKINGS BASED ON AVERAGE COMBINED MONTHLY ACTIVE USERS ACROSS IPHONES AND ANDROID PHONES BETWEEN 01 SEPTEMBER 2024 AND 30 NOVEMBER 2024. RANKINGS INCLUDE PRE-INSTALLED APPS (E.G. YOUTUBE ON ANDROID PHONES).

FEB 2025

APP RANKING: DOWNLOADS

RANKING OF MOBILE APPS AND MOBILE GAMES BY TOTAL NUMBER OF DOWNLOADS BETWEEN 01 SEPTEMBER 2024 AND 30 NOVEMBER 2024

VIETNAM

#	MOBILE APP	COMPANY
01	ZALO	VNG
02	MB BANK	MB BANK
03	TIKTOK	BYTEDANCE
04	THREADS	META
05	VNEID	TRUNG TÂM DỮ LIỆU QUỐC GIA VỀ DÂN CƯ
06	SHOPEE	SEA
07	FACEBOOK	META
08	TIKTOK NOTES	BYTEDANCE
09	CHATGPT	OPENAI
10	CAPCUT	BYTEDANCE

#	MOBILE GAME	COMPANY
01	FREE FIRE	SEA
02	ARENA OF VALOR	SEA
03	ANNOYING PUZZLE GAME	GPLAY JSC
04	TALKING TOM GOLD RUN	JINKE CULTURE - OUTFIT7
05	ROBLOX - VNG	VNG
06	OFFLINE GAMES - NO WIFI GAMES	JINDOBLU
07	MINI GAMES: CALM & RELAX	ONESOFT
08	PLAY TOGETHER	HAEGIN
09	ĐẤU TRƯỜNG LOKAPALA VTC GAME	VTC
10	X-SAMKOK	4399

SOURCE: DATA.AI (A SENSOR TOWER COMPANY). NOTES: RANKINGS BASED ON COMBINED USER ACTIVITY ACROSS THE GOOGLE PLAY STORE AND APPLE IOS APP STORE BETWEEN 01 SEPTEMBER 2024 AND 30 NOVEMBER 2024.

FEB 2025

APP RANKING: CONSUMER SPEND

RANKING OF MOBILE APPS AND MOBILE GAMES BY TOTAL CONSUMER SPEND BETWEEN 01 SEPTEMBER 2024 AND 30 NOVEMBER 2024

VIETNAM

#	MOBILE APP	COMPANY
01	TIKTOK	BYTEDANCE
02	TELEGRAM	TELEGRAM
03	YOUTUBE	GOOGLE
04	CAPCUT	BYTEDANCE
05	GOOGLE ONE	GOOGLE
06	VIEON	DZONES HUB
07	WEPLAY	WEJOY
08	ZALO	VNG
09	TINDER	MATCH GROUP
10	CHATGPT	OPENAI

#	MOBILE GAME	COMPANY
01	COIN MASTER	MOON ACTIVE
02	ARENA OF VALOR	SEA
03	FREE FIRE	SEA
04	CANDY CRUSH SAGA	ACTIVISION BLIZZARD
05	RISE OF KINGDOMS	LILITH
06	X-SAMKOK	4399
07	PUBG MOBILE	TENCENT
08	ZOMBIE WAVES	FUN FORMULA
09	LEAGUE OF LEGENDS: WILD RIFT	TENCENT
10	BẮN CÁ VUI - LỄ HỘI SĂN CÁ	CÔNG TY TNHH GAME VIỆT

SOURCE: DATA.AI (A SENSOR TOWER COMPANY). NOTES: RANKINGS BASED ON COMBINED USER ACTIVITY ACROSS THE GOOGLE PLAY STORE AND APPLE IOS APP STORE BETWEEN 01 SEPTEMBER 2024 AND 30 NOVEMBER 2024. "CONSUMER SPEND" ONLY INCLUDES SPEND ON APPS AND IN-APP PURCHASES VIA APP STORES, AND DOES NOT INCLUDE REVENUES FROM ECOMMERCE OR MOBILE ADVERTISING.

ACCESSING ONLINE INFORMATION

PERCENTAGE OF INTERNET USERS AGED 16+ WHO ENGAGE IN EACH KIND OF ONLINE ACTIVITY

VIETNAM

USE A SEARCH ENGINE (E.G. GOOGLE, BING, DUCKDUCKGO) EACH MONTH	USE VOICE ASSISTANTS (E.G. SIRI, GOOGLE ASSISTANT) TO FIND INFORMATION EACH WEEK	VISIT SOCIAL NETWORKS TO LOOK FOR INFORMATION ABOUT BRANDS AND PRODUCTS
87.1%	20.7%	60.6%

USE IMAGE SEARCH TOOLS (E.G. GOOGLE LENS, PINTEREST LENS) ON MOBILE EACH MONTH	SCAN A QR CODE ON A MOBILE PHONE EACH MONTH	USE ONLINE TOOLS TO TRANSLATE TEXT INTO DIFFERENT LANGUAGES EACH WEEK
34.0%	58.3%	34.5%

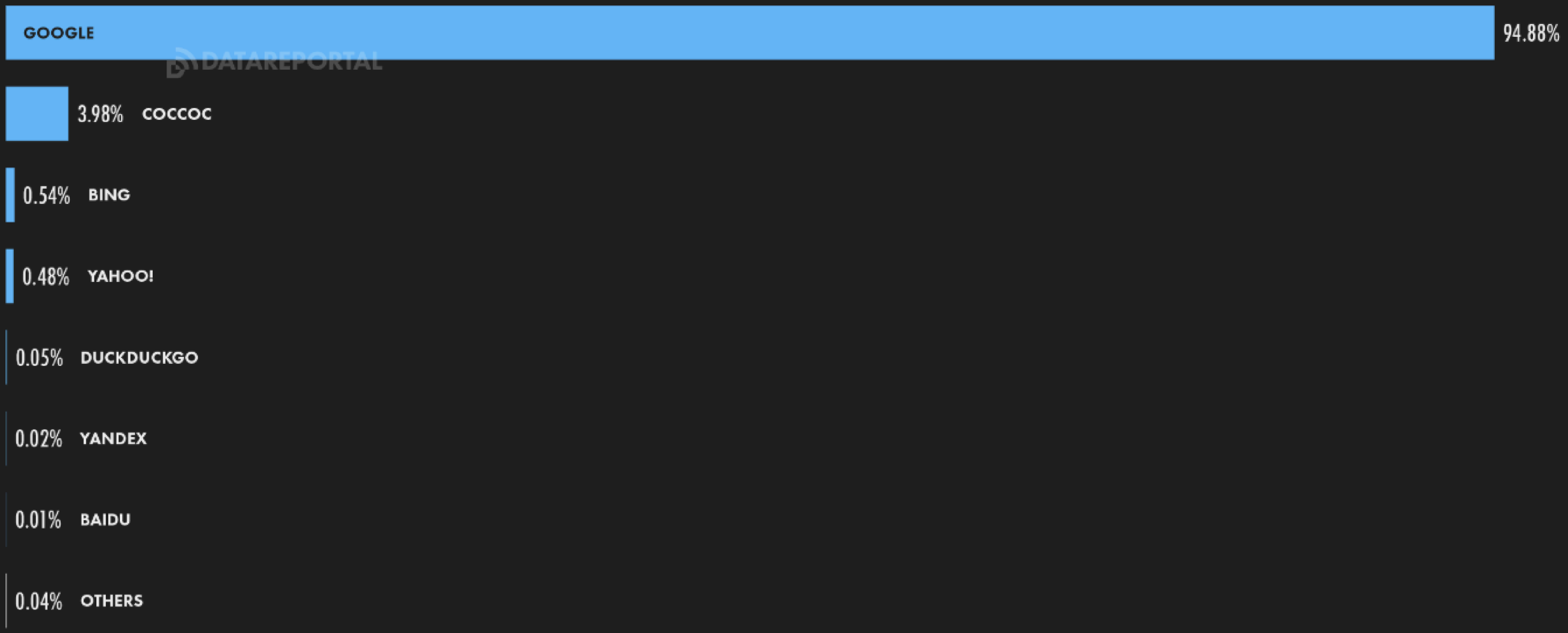
SOURCE: GWI (Q3 2024). COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

FEB 2025

SHARE OF SEARCH ENGINE REFERRALS

PERCENTAGE OF TOTAL WEB TRAFFIC REFERRED BY SEARCH ENGINES THAT ORIGINATED FROM EACH SEARCH SERVICE

VIETNAM



SOURCE: STATCOUNTER. **NOTES:** FIGURES REPRESENT THE NUMBER OF PAGE VIEW REFERRALS ORIGINATING FROM EACH SERVICE AS A PERCENTAGE OF TOTAL PAGE VIEW REFERRALS ORIGINATING FROM SEARCH ENGINES IN DECEMBER 2024. FIGURES MAY NOT SUM TO 100% DUE TO ROUNDING.

FEB 2025

TOP GOOGLE SEARCHES

QUERIES WITH THE GREATEST VOLUME OF GOOGLE SEARCH ACTIVITY BETWEEN 01 JANUARY 2024 AND 31 DECEMBER 2024

VIETNAM

#	SEARCH QUERY	INDEX vs. TOP QUERY
01	PHIM	100
02	XỔ SỐ	88
03	DỊCH	62
04	XSMB	36
05	XSMN	36
06	GG	35
07	XỔ SỐ MIỀN NAM	34
08	THỜI TIẾT	31
09	YOUTUBE	28
10	LỊCH	26

#	SEARCH QUERY	INDEX vs. TOP QUERY
11	GOOGLE	25
12	XỔ SỐ MIỀN BẮC	25
13	GG DỊCH	22
14	FACEBOOK	18
15	XỔ SỐ HÔM NAY	16
16	FB	15
17	DICH	14
18	VN	13
19	SXMB	13
20	SO XO	11

SOURCE: GOOGLE TRENDS, BASED ON SEARCHES CONDUCTED BETWEEN 01 JANUARY 2024 AND 31 DECEMBER 2024. **NOTES:** ANY SPELLING ERRORS OR LANGUAGE INCONSISTENCIES IN SEARCH QUERIES ARE AS PUBLISHED BY GOOGLE TRENDS, AND ARE SHOWN "AS IS", TO ENABLE READERS TO IDENTIFY POTENTIAL CHANGES IN HOW PEOPLE USE LANGUAGE IN DIGITAL ENVIRONMENTS. GOOGLE DOES NOT PUBLISH ABSOLUTE SEARCH VOLUMES, BUT THE "INDEX vs. TOP QUERY" COLUMN SHOWS RELATIVE SEARCH VOLUMES FOR EACH QUERY COMPARED WITH THE SEARCH VOLUME OF THE TOP QUERY. **ADVISORY:** GOOGLE TRENDS USES DYNAMIC SAMPLING, SO RANK ORDER AND INDEX VALUES MAY VARY DEPENDING ON WHEN THE TOOL IS ACCESSED, EVEN FOR THE SAME SEARCH QUERY AND QUERY TIME PERIOD.

ONLINE SHOPPING

FEB 2025

FINANCIAL INCLUSION FACTORS

PERCENTAGE OF THE TOTAL POPULATION AGED 15+ THAT OWNS OR USES EACH PRODUCT OR SERVICE

VIETNAM

	TOTAL	FEMALE	MALE
ACCOUNT WITH A FINANCIAL INSTITUTION	56.1%	52.5%	59.9%
CREDIT CARD OWNERSHIP	5.6%	4.0%	7.3%
DEBIT CARD OWNERSHIP	48.9%	45.5%	52.4%
MOBILE MONEY ACCOUNT (E.G. MPESA, GCASH)	16.5%	14.7%	18.3%
MADE A DIGITAL PAYMENT (PAST YEAR)	42.0%	40.3%	43.8%
MADE A PURCHASE USING A MOBILE PHONE OR THE INTERNET (PAST YEAR)	40.4%	42.1%	38.5%
USED A MOBILE PHONE OR THE INTERNET TO SEND MONEY (PAST YEAR)	31.6%	29.9%	33.4%
USED A MOBILE PHONE OR THE INTERNET TO PAY BILLS (PAST YEAR)	25.0%	24.5%	25.6%

SOURCE: WORLD BANK. **NOTES:** SOME FIGURES HAVE NOT BEEN UPDATED IN THE PAST YEAR, SO MAY BE LESS REPRESENTATIVE OF CURRENT REALITIES. PERCENTAGES ARE OF PEOPLE AGED 15 AND ABOVE, NOT OF TOTAL POPULATION. MOBILE MONEY ACCOUNTS ONLY REFER TO SERVICES THAT STORE FUNDS IN AN ELECTRONIC WALLET LINKED DIRECTLY TO A PHONE NUMBER, SUCH AS MPESA, GCASH, AND TIGO PESA. FIGURES FOR MOBILE MONEY ACCOUNTS DO NOT INCLUDE PEOPLE WHO USE 'OVER-THE-TOP' MOBILE PAYMENT SERVICES SUCH AS APPLE PAY, GOOGLE PAY, OR SAMSUNG PAY. **COMPARABILITY:** DECIMAL ACCURACY OF SOURCE DATA MAY RESULT IN MINOR ROUNDING DIFFERENCES (±0.1%) COMPARED WITH VALUES PUBLISHED ON THE WORLD BANK'S ONLINE DATA PORTAL.

WEEKLY ONLINE SHOPPING ACTIVITIES

PERCENTAGE OF INTERNET USERS AGED 16+ WHO ENGAGE IN SELECTED ECOMMERCE ACTIVITIES EACH WEEK

VIETNAM

PURCHASED A PRODUCT OR SERVICE ONLINE	ORDERED GROCERIES VIA AN ONLINE STORE	BOUGHT A SECOND-HAND ITEM VIA AN ONLINE STORE	USED AN ONLINE PRICE COMPARISON SERVICE	USED A BUY NOW, PAY LATER SERVICE
60.6%	24.7%	13.4%	24.5%	12.3%

SOURCE: GWI (Q3 2024). COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

OVERVIEW OF CONSUMER GOODS ECOMMERCE

HEADLINES FOR THE ADOPTION AND USE OF CONSUMER GOODS ECOMMERCE (B2C ONLY)

VIETNAM

NUMBER OF PEOPLE PURCHASING CONSUMER GOODS VIA ONLINE CHANNELS IN 2024	ESTIMATED TOTAL ANNUAL SPEND ON ONLINE CONSUMER GOODS PURCHASES (USD, 2024)	AVERAGE ANNUAL REVENUE PER CONSUMER GOODS ECOMMERCE SHOPPER (USD, 2024)	SHARE OF 2024 CONSUMER GOODS ECOMMERCE SPEND ATTRIBUTABLE TO PURCHASES MADE VIA MOBILE PHONES	2024 ONLINE PURCHASES vs. TOTAL CONSUMER GOODS PURCHASE VALUE ACROSS ALL RETAIL CHANNELS
27.0 MILLION	**$13.9 BILLION**	**$499**	**55.1%**	**7.6%**
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
+7.6% (+1.9 MILLION)	+15.0% (+$1.8 BILLION)	+5.8% (+$27.20)	+2.0% (+109 BPS)	+7.0% (+50 BPS)

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** "CONSUMER GOODS" INCLUDE: BEAUTY & PERSONAL CARE; BEVERAGES; DIY & HARDWARE STORE; ELECTRONICS; EYEWEAR; FASHION; FOOD; FURNITURE; HOUSEHOLD ESSENTIALS; PHYSICAL MEDIA; OTC PHARMACEUTICALS; TOBACCO PRODUCTS; TOYS & HOBBY. FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2024, AND COMPARISONS WITH THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE. "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. **COMPARABILITY:** SIGNIFICANT BASE REVISIONS AND MAJOR CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

FEB 2025

ECOMMERCE: CONSUMER GOODS CATEGORIES

ESTIMATED ANNUAL SPEND IN EACH CONSUMER GOODS ECOMMERCE CATEGORY (B2C ONLY, U.S. DOLLARS, FULL-YEAR 2024)

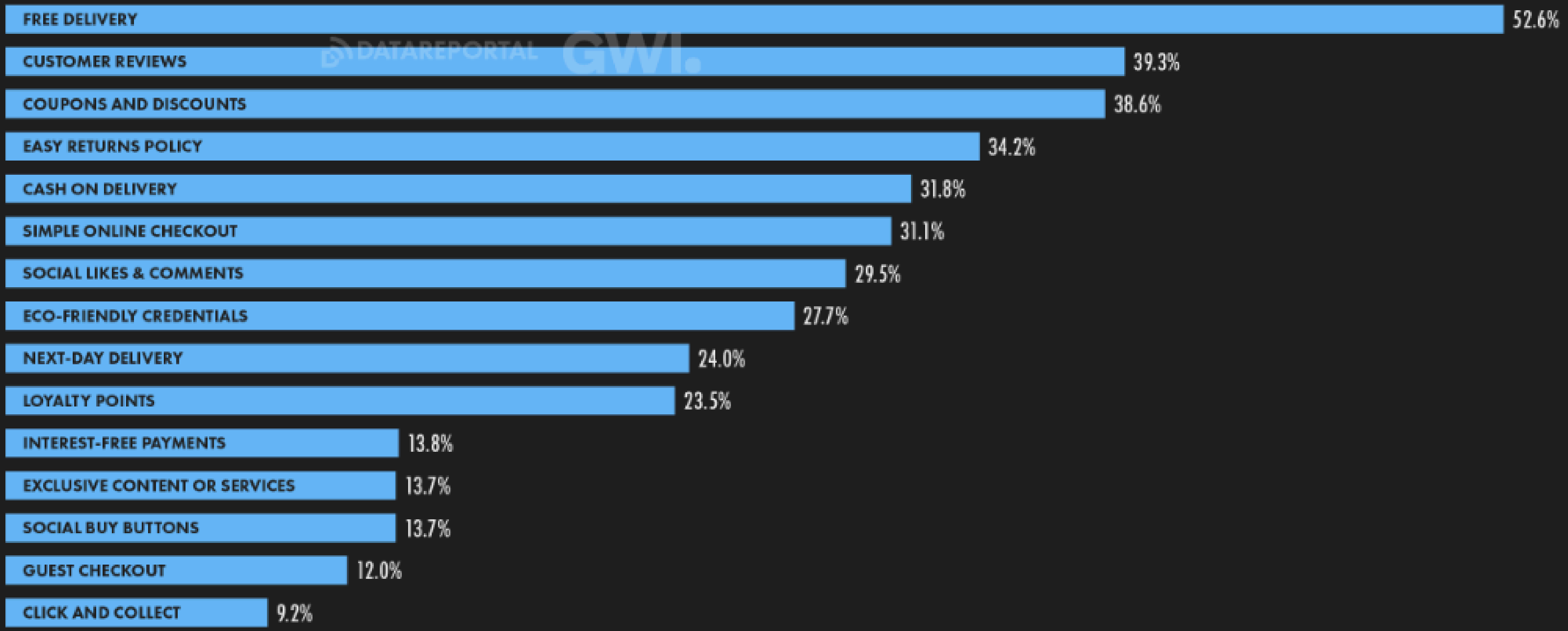
VIETNAM

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** WHERE LETTERS ARE SHOWN NEXT TO FIGURES, "K" DENOTES THOUSANDS (E.G. "123 K" = 123,000), "M" DENOTES MILLIONS (E.G. "1.23 M" = 1,230,000), AND "B" DENOTES BILLIONS (E.G. "1.23 B" = 1,230,000,000). WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. FIGURES REPRESENT ESTIMATES OF FULL-YEAR REVENUES FOR 2024 IN U.S. DOLLARS. THE "PHYSICAL MEDIA" CATEGORY DOES NOT INCLUDE DIGITAL DOWNLOADS OR STREAMING. **COMPARABILITY:** SIGNIFICANT BASE REVISIONS AND MAJOR CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

ONLINE PURCHASE DRIVERS

PERCENTAGE OF INTERNET USERS AGED 16+ WHO SAY EACH FACTOR WOULD ENCOURAGE THEM TO COMPLETE AN ONLINE PURCHASE

VIETNAM



SOURCE: GWI (Q3 2024). COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

FEB 2025

TOP GOOGLE SHOPPING SEARCHES

SHOPPING QUERIES WITH THE GREATEST VOLUME OF GOOGLE SEARCH ACTIVITY BETWEEN 01 JANUARY 2024 AND 31 DECEMBER 2024

VIETNAM

#	SEARCH QUERY	INDEX vs. TOP QUERY
01	IPHONE	100
02	DỊCH	92
03	SAMSUNG	81
04	GIÀY	59
05	ĐỒNG HỒ	58
06	ĐIỆN THOẠI	49
07	SÁCH	45
08	GG	39
09	GAME	38
10	XE MÁY	36

#	SEARCH QUERY	INDEX vs. TOP QUERY
11	XE ĐẠP	35
12	OPPO	33
13	GG DỊCH	33
14	SHOPEE	29
15	MÁY TÍNH	28
16	GOOGLE	27
17	LEGO	26
18	NIKE	25
19	REDMI	23
20	LAPTOP	23

SOURCE: GOOGLE TRENDS, BASED ON SHOPPING SEARCHES CONDUCTED ON GOOGLE SEARCH BETWEEN 01 JANUARY 2024 AND 31 DECEMBER 2024. **NOTES:** ANY LANGUAGE ANOMALIES OR SPELLING ERRORS IN QUERIES ARE AS PUBLISHED BY GOOGLE TRENDS, AND ARE SHOWN "AS IS", TO ENABLE READERS TO IDENTIFY POTENTIAL CHANGES IN HOW PEOPLE USE LANGUAGE IN THEIR SEARCH ACTIVITIES. GOOGLE DOES NOT PUBLISH ABSOLUTE SEARCH VOLUMES, BUT THE "INDEX vs. TOP QUERY" COLUMN SHOWS RELATIVE SEARCH VOLUMES FOR EACH QUERY COMPARED WITH THE SEARCH VOLUME OF THE TOP QUERY. **ADVISORY:** GOOGLE TRENDS USES DYNAMIC SAMPLING, SO RANK ORDER AND INDEX VALUES MAY VARY DEPENDING ON WHEN THE TOOL IS ACCESSED, EVEN FOR THE SAME TIME PERIOD.

FEB 2025

ONLINE GROCERY SHOPPING OVERVIEW

HEADLINES FOR THE ADOPTION AND USE OF ONLINE GROCERY ORDERING AND DELIVERY SERVICES

VIETNAM

NUMBER OF PEOPLE ORDERING GROCERIES VIA ONLINE PLATFORMS	YEAR-ON-YEAR CHANGE IN THE NUMBER OF PEOPLE BUYING GROCERIES ONLINE	TOTAL ANNUAL VALUE OF ONLINE GROCERY ORDERS (USD, 2024)	YEAR-ON-YEAR CHANGE IN MARKET VALUE: ONLINE GROCERY ORDERS	AVERAGE ANNUAL SPEND PER USER: ONLINE GROCERY ORDERS (USD, 2024)
14.6 MILLION	+12.5% +1.62 MILLION	$1.77 BILLION	+27.3% +$380 MILLION	$121

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** INCLUDES FOOD & BEVERAGES, PERSONAL CARE AND HOUSEHOLD ITEMS, QUICK COMMERCE, AND MEAL RECIPE KITS (E.G. HELLOFRESH). ONLY INCLUDES ORDERS MADE VIA ONLINE SERVICES, BUT INCLUDES "CLICK-AND-COLLECT" ORDERS WHERE ITEMS ARE PURCHASED ONLINE BUT PICKED UP BY THE BUYER. FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2024. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. **COMPARABILITY:** BASE AND CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

FEB 2025

ONLINE TRAVEL AND TOURISM

ANNUAL ONLINE SPEND ON TRAVEL AND TOURISM SERVICES (U.S. DOLLARS, FULL-YEAR 2024)

VIETNAM

FLIGHTS	TRAINS	CAR RENTALS	LONG-DISTANCE BUSES
$5.08 BILLION	**$154 MILLION**	**$419 MILLION**	**$165 MILLION**
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
+10.2% (+$470 MILLION)	**+8.6% (+$12 MILLION)**	**+7.3% (+$28 MILLION)**	**+9.2% (+$14 MILLION)**

HOTELS	PACKAGE HOLIDAYS	VACATION RENTALS	CRUISES
$935 MILLION	**$759 MILLION**	**$199 MILLION**	**$1.20 MILLION**
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
+7.9% (+$68 MILLION)	**+11.0% (+$75 MILLION)**	**+7.3% (+$14 MILLION)**	**+11.3% (+$122 THOUSAND)**

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** ONLY INCLUDES PURCHASES MADE VIA ONLINE CHANNELS. FIGURES REPRESENT ESTIMATES OF FULL-YEAR REVENUES FOR 2024 IN U.S. DOLLARS, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. VALUES DO NOT INCLUDE REVENUES ASSOCIATED WITH PUBLIC TRANSPORT, NON-COMMERCIAL FLIGHTS, FERRIES, TAXIS, RIDE-SHARING, RIDE-HAILING, OR CHAUFFEUR SERVICES. **COMPARABILITY:** BASE AND CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

ONLINE RIDE-HAILING OVERVIEW

HEADLINES FOR THE ADOPTION AND USE OF ONLINE RIDE-HAILING SERVICES

VIETNAM

NUMBER OF PEOPLE USING ONLINE RIDE-HAILING SERVICES	YEAR-ON-YEAR CHANGE IN THE NUMBER OF ONLINE RIDE-HAILING SERVICE USERS	TOTAL ANNUAL VALUE OF ONLINE RIDE-HAILING BOOKINGS (USD, 2024)	YEAR-ON-YEAR CHANGE IN MARKET VALUE: ONLINE RIDE-HAILING BOOKINGS	AVERAGE ANNUAL VALUE PER USER: ONLINE RIDE-HAILING BOOKINGS (USD, 2024)
28.1 MILLION	+7.4% +1.94 MILLION	$1.73 BILLION	+8.8% +$140 MILLION	$61.54

SOURCE: STATISTA MARKET INSIGHTS. NOTES: IN THIS CONTEXT, "RIDE-HAILING" ENCOMPASSES ON-DEMAND TRANSPORTATION FACILITATED VIA MOBILE APPS AND ONLINE PLATFORMS. VALUES INCLUDE THE BOOKING OF RIDES IN PRIVATE VEHICLES (E.G. UBER, LYFT, GRAB) AND TRADITIONAL TAXI SERVICES. ONLY INCLUDES BOOKINGS THAT ARE MADE VIA ONLINE SERVICES. FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2024. VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. COMPARABILITY: BASE AND CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

DIGITAL FINANCE

USE OF ONLINE FINANCIAL SERVICES

PERCENTAGE OF INTERNET USERS AGED 16+ WHO OWN OR USE EACH KIND OF DIGITAL FINANCIAL SERVICE

VIETNAM

USE A BANKING, INVESTMENT, OR INSURANCE WEBSITE OR MOBILE APP EACH MONTH	USE A MOBILE PAYMENT SERVICE (E.G. APPLE PAY, SAMSUNG PAY) EACH MONTH	OWN ANY FORM OF CRYPTOCURRENCY (E.G. BITCOIN, ETHER)
25.2%	24.0%	16.0%

SOURCE: GWI (Q3 2024). COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

OVERVIEW OF CONSUMER DIGITAL PAYMENTS

HEADLINES FOR THE ADOPTION AND USE OF DIGITALLY ENABLED PAYMENT SERVICES BY END CONSUMERS

VIETNAM

NUMBER OF PEOPLE MAKING DIGITAL PAYMENTS	YEAR-ON-YEAR CHANGE IN THE NUMBER OF PEOPLE MAKING DIGITAL PAYMENTS	TOTAL ANNUAL VALUE OF DIGITAL PAYMENT TRANSACTIONS (USD, 2024)	YEAR-ON-YEAR CHANGE IN THE VALUE OF DIGITAL PAYMENT TRANSACTIONS	AVERAGE ANNUAL VALUE OF DIGITAL PAYMENTS PER USER (USD, 2024)
36.6 MILLION	+9.7% +3.24 MILLION	$32.2 BILLION	+15.6% +$4.35 BILLION	$880

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** "DIGITAL PAYMENTS" INCLUDE MOBILE P.O.S. PAYMENTS (E.G. PAYMENTS VIA APPLE PAY OR SAMSUNG PAY), B2C DIGITAL COMMERCE, AND B2C DIGITAL REMITTANCES. VALUES DO NOT INCLUDE B2B TRANSACTIONS. FIGURES REPRESENT ESTIMATES FOR FULL-YEAR FOR 2024, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. **COMPARABILITY:** BASE CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

ONLINE HEALTH & FITNESS

DIGITAL HEALTH, FITNESS, AND WELLBEING

PERCENTAGE OF INTERNET USERS AGED 16+ THAT MAKE USE OF CONNECTED HEALTH, FITNESS, AND WELLBEING DEVICES AND SERVICES

VIETNAM

USE A DIGITAL HEALTH OR FITNESS WEBSITE OR MOBILE APP EACH MONTH	CHECK HEALTH SYMPTOMS ONLINE EACH WEEK	USE ONLINE RESOURCES TO IDENTIFY TREATMENTS FOR EVERYDAY AILMENTS	OWN A SMARTWATCH (E.G. APPLE WATCH)	OWN A SMART WRISTBAND (E.G. FITBIT)
29.0%	21.1%	86.7%	28.2%	11.8%

SOURCE: GWI (Q3 2024). COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

DIGITAL HEALTH TREATMENT & CARE OVERVIEW

HEADLINES FOR THE ADOPTION AND USE OF DIGITALLY ENABLED HEALTHCARE TREATMENTS AND CARE

VIETNAM

NUMBER OF PEOPLE USING DIGITAL HEALTH TREATMENT & CARE	YEAR-ON-YEAR CHANGE IN USERS OF DIGITAL HEALTH TREATMENT & CARE	TOTAL ANNUAL VALUE OF THE DIGITAL HEALTH TREATMENT & CARE MARKET (USD, 2024)	YEAR-ON-YEAR CHANGE IN MARKET VALUE: DIGITAL HEALTH TREATMENT & CARE MARKET	AVERAGE ANNUAL VALUE PER USER: DIGITAL HEALTH TREATMENT & CARE (USD, 2024)
10.5 MILLION	+6.0% +600 THOUSAND	$594 MILLION	+16.9% +$85.8 MILLION	$56.39

SOURCE: STATISTA MARKET INSIGHTS. NOTES: INCLUDES DIGITAL TOOLS THAT ARE USED TO DIAGNOSE, TREAT, AND MANAGE MEDICAL CONDITIONS, INCLUDING BIOMETRIC SENSORS AND DIGITAL CARE MANAGEMENT. DOES NOT INCLUDE SMART CLOTHING, SMART SHOES, OR SMART EYEWEAR. FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2024, AND COMPARISONS TO EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE; "BPS" VALUES SHOW ABSOLUTE CHANGE. COMPARABILITY: BASE AND CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

ONLINE DOCTOR CONSULTATIONS OVERVIEW

HEADLINES FOR THE ADOPTION AND USE OF ONLINE DOCTOR CONSULTATION SERVICES

VIETNAM

NUMBER OF PEOPLE USING ONLINE DOCTOR CONSULTATION SERVICES	YEAR-ON-YEAR CHANGE IN USERS OF ONLINE DOCTOR CONSULTATION SERVICES	TOTAL ANNUAL VALUE OF ONLINE DOCTOR CONSULTATIONS (USD, 2024)	YEAR-ON-YEAR CHANGE IN MARKET VALUE: ONLINE DOCTOR CONSULTATIONS	AVERAGE ANNUAL VALUE PER USER: ONLINE DOCTOR CONSULTATIONS (USD, 2024)
2.24 MILLION	+5.2% +110 THOUSAND	$42.4 MILLION	+14.2% +$5.26 MILLION	$18.93

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SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** INCLUDES TELEMEDICINE AND OTHER DIGITAL TOOLS THAT ENABLE PATIENTS TO CONSULT WITH DOCTORS REMOTELY. FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2024, AND COMPARISONS TO EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE; "BPS" VALUES SHOW ABSOLUTE CHANGE. **COMPARABILITY:** BASE AND CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

FEB
2025

DIGITAL FITNESS & WELL-BEING OVERVIEW

HEADLINES FOR THE ADOPTION AND USE OF DIGITAL FITNESS & WELL-BEING DEVICES AND SERVICES

VIETNAM

NUMBER OF PEOPLE USING DIGITAL FITNESS & WELL-BEING DEVICES AND SERVICES	YEAR-ON-YEAR CHANGE IN THE NUMBER OF DIGITAL FITNESS & WELL-BEING USERS	TOTAL ANNUAL VALUE OF THE DIGITAL FITNESS & WELL-BEING MARKET (USD, 2024)	YEAR-ON-YEAR CHANGE IN MARKET VALUE: DIGITAL FITNESS & WELL-BEING MARKET	AVERAGE ANNUAL VALUE PER USER: DIGITAL FITNESS & WELL-BEING (USD, 2024)
14.8 MILLION	+12.8% +1.68 MILLION	$290 MILLION	+19.2% +$46.6 MILLION	$19.62

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** INCLUDES SMARTWATCHES, FITNESS AND ACTIVITY TRACKING WRIST-WEAR, SMART SCALES, FITNESS APPS THAT TRACK ACHIEVEMENTS, NUTRITION APPS (E.G. CALORIE COUNTING), AND MEDITATION AND MINDFULNESS APPS. DOES NOT INCLUDE SMART CLOTHING, SMART SHOES, SMART EYEWEAR, HEALTH TRACKING APPS, PARAMETER-SPECIFIC BIOSENSORS (E.G. BLOOD GLUCOSE MONITORS), OR APPS THAT FOCUS ON SPECIFIC DISEASES. FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2024, AND COMPARISONS TO EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE; "BPS" VALUES SHOW ABSOLUTE CHANGE. **COMPARABILITY:** BASE AND CATEGORY DEFINITION CHANGES.

SMART HOME

SMART HOME MARKET OVERVIEW

VALUE OF THE MARKET FOR SMART HOME DEVICES (U.S. DOLLARS)

VIETNAM

NUMBER OF HOMES WITH SMART HOME DEVICES	TOTAL ANNUAL VALUE OF THE SMART HOME DEVICES MARKET	VALUE OF SMART HOME APPLIANCES MARKET	VALUE OF SMART HOME CONTROL & CONNECTIVITY DEVICE MARKET
3.64 MILLION	$329 MILLION	$165 MILLION	$51.6 MILLION
YEAR-ON-YEAR CHANGE +15.2% (+480 THOUSAND)	YEAR-ON-YEAR CHANGE +19.1% (+$53 MILLION)	YEAR-ON-YEAR CHANGE +18.2% (+$25 MILLION)	YEAR-ON-YEAR CHANGE +27.2% (+$11 MILLION)

VALUE OF SMART HOME SECURITY DEVICE MARKET	VALUE OF SMART HOME ENTERTAINMENT DEVICE MARKET	VALUE OF SMART HOME COMFORT & LIGHTING MARKET	VALUE OF SMART HOME ENERGY MANAGEMENT MARKET
$48.8 MILLION	$35.3 MILLION	$15.2 MILLION	$12.5 MILLION
YEAR-ON-YEAR CHANGE +19.7% (+$8.0 MILLION)	YEAR-ON-YEAR CHANGE +12.4% (+$3.9 MILLION)	YEAR-ON-YEAR CHANGE +22.1% (+$2.8 MILLION)	YEAR-ON-YEAR CHANGE +14.7% (+$1.6 MILLION)

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** "SMART HOME DEVICES" INCLUDE: DIGITALLY CONNECTED AND CONTROLLED HOME DEVICES THAT CAN BE REMOTELY CONTROLLED; SENSORS, ACTUATORS AND CLOUD SERVICES THAT ENABLE HOME AUTOMATION; CONTROL HUBS THAT CONNECT SENSORS AND ACTUATORS TO REMOTE CONTROLS AND TO EACH OTHER; AND SMART HOME-RELATED SOFTWARE SALES (INCLUDING SUBSCRIPTION FEES). DOES NOT INCLUDE SMART TVS, OR B2B OR C2C SALES. FIGURES REPRESENT ESTIMATES OF FULL-YEAR REVENUES FOR 2024 IN U.S. DOLLARS, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. **COMPARABILITY:** BASE CHANGES. SEE NOTES ON DATA.

FEB 2025

AVERAGE ANNUAL REVENUE PER SMART HOME

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

VIETNAM

PENETRATION OF SMART HOME DEVICES	ARPU: SPEND ON ALL SMART HOME DEVICES	ARPU: SMART HOME APPLIANCES	ARPU: SMART HOME CONTROL & CONNECTIVITY DEVICES
15.4%	$90.22	$93.80	$36.18
YEAR-ON-YEAR CHANGE +13.7% (+185 BPS)	YEAR-ON-YEAR CHANGE +3.2% (+$2.82)	YEAR-ON-YEAR CHANGE -2.9% (-$2.81)	YEAR-ON-YEAR CHANGE +3.7% (+$1.29)

ARPU: SMART HOME SECURITY DEVICES	ARPU: SMART HOME ENTERTAINMENT DEVICES	ARPU: SMART HOME COMFORT & LIGHTING	ARPU: SMART HOME ENERGY MANAGEMENT
$23.78	$17.00	$6.97	$7.16
YEAR-ON-YEAR CHANGE -0.1% (-$0.03)	YEAR-ON-YEAR CHANGE -5.1% (-$0.91)	YEAR-ON-YEAR CHANGE +0.3% (+$0.02)	YEAR-ON-YEAR CHANGE -8.3% (-$0.65)

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** "SMART HOME DEVICES" INCLUDE: DIGITALLY CONNECTED AND CONTROLLED HOME DEVICES THAT CAN BE REMOTELY CONTROLLED; SENSORS, ACTUATORS AND CLOUD SERVICES THAT ENABLE HOME AUTOMATION; CONTROL HUBS THAT CONNECT SENSORS AND ACTUATORS TO REMOTE CONTROLS AND TO EACH OTHER; AND SMART HOME-RELATED SOFTWARE SALES (INCLUDING SUBSCRIPTION FEES). DOES NOT INCLUDE SMART TVS, OR B2B OR C2C SALES. FIGURES REPRESENT ESTIMATES OF FULL-YEAR SPEND PER SMART HOME FOR 2024 IN U.S. DOLLARS, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. **COMPARABILITY:** BASE CHANGES. SEE NOTES ON DATA.

ENTERTAINMENT

FEB 2025

TV CONSUMPTION AND STREAMING

EXPLORING THE TV VIEWING BEHAVIOURS OF INTERNET USERS AGED 16+

VIETNAM

PERCENTAGE OF INTERNET USERS WHO WATCH ANY KIND OF TV EACH MONTH	YEAR-ON-YEAR CHANGE IN INTERNET USERS WHO WATCH ANY KIND OF TV	DAILY TIME THAT INTERNET USERS SPEND WATCHING ANY KIND OF TV	YEAR-ON-YEAR CHANGE IN DAILY TV VIEWING TIME (ALL FORMS OF CONTENT DELIVERY)
98.2%	+1.2% +120 BPS	2H 03M	-12.5% -18 MINS

INTERNET USERS WHO STREAM TV CONTENT vs. INTERNET USERS WHO WATCH ANY KIND OF TV	DAILY TIME SPENT WATCHING TV CONTENT STREAMED OVER THE INTERNET	YEAR-ON-YEAR CHANGE IN DAILY TIME SPENT WATCHING STREAMING TV CONTENT	TIME SPENT WATCHING STREAMING TV CONTENT AS A PERCENTAGE OF TOTAL TV TIME
98.0%	1H 03M	-11.2% -8 MINS	51.5%

SOURCE: GWI (Q3 2024). COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA. NOTES: PERCENTAGE CHANGE VALUES SHOW THE RELATIVE CHANGE IN THE RESPECTIVE METRIC vs. THE PREVIOUS PERIOD (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES SHOW ABSOLUTE CHANGE.

FEB 2025

MOST STREAMED CONTENT ON NETFLIX

FLIXPATROL'S RANKING OF THE MOST STREAMED CONTENT ON NETFLIX BETWEEN 01 JANUARY AND 31 DECEMBER 2024

VIETNAM

MOST STREAMED MOVIES

#	MOVIE NAME	INDEX
01	MAI	100
02	MINIONS: THE RISE OF GRU	65
03	SONG OF THE SOUTH	54
04	NO MORE BETS	42
05	BADLAND HUNTERS	37
06	HOW TO MAKE MILLIONS BEFORE GRANDMA DIES	31
07	ON THE DRINKING TABLE UNDER THE PLANNING TABLE	29
08	MA DA: THE DROWNING SPIRIT	28
09	FACE OFF 6: THE TICKET OF DESTINY	27
10	THE LAST WIFE	27

MOST STREAMED TV SHOWS

#	TV SHOW NAME	INDEX
01	QUEEN OF TEARS	100
02	LOVE NEXT DOOR	72
03	DEMON SLAYER: KIMETSU NO YAIBA	69
04	KAIJU NO. 8	59
05	DOCTOR SLUMP	57
06	GYEONGSEONG CREATURE	56
07	SOLO LEVELING	53
08	MISS NIGHT AND DAY	52
09	EMILY IN PARIS	49
10	DAN DA DAN	46

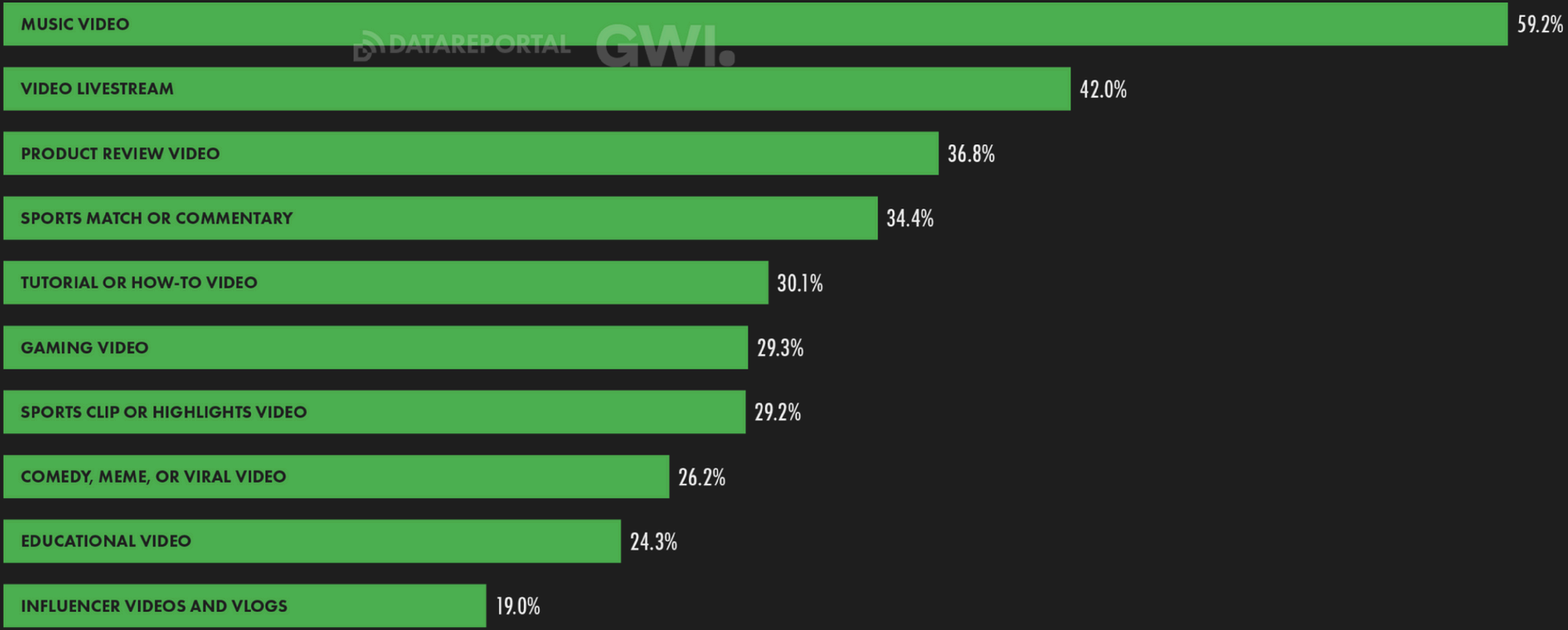
SOURCE: FLIXPATROL. SEE FLIXPATROL.COM. NOTES: THE SAME CONTENT MAY HAVE DIFFERENT TITLES IN DIFFERENT COUNTRIES. RANKINGS BASED ON FLIXPATROL'S ANALYSIS OF VIEWING ACTIVITY BETWEEN 01 JANUARY AND 31 DECEMBER 2024. "INDEX" VALUES COMPARE THE FLIXPATROL "POINTS" VALUE FOR EACH TITLE TO THE FLIXPATROL "POINTS" VALUE OF THE TOP-RANKED TITLE IN EACH PLATFORM'S RANKING.

FEB 2025

TYPES OF ONLINE VIDEO CONTENT WATCHED

PERCENTAGE OF INTERNET USERS AGED 16+ WHO WATCH EACH KIND OF VIDEO CONTENT VIA THE INTERNET EACH WEEK

VIETNAM



SOURCE: GWI (Q3 2024). COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

ONLINE AUDIO

PERCENTAGE OF INTERNET USERS AGED 16+ WHO CONSUME EACH KIND OF AUDIO CONTENT VIA THE INTERNET EACH WEEK

VIETNAM

WATCH OR LISTEN TO ONLINE MUSIC VIDEOS	LISTEN TO MUSIC STREAMING SERVICES	LISTEN TO ONLINE RADIO SHOWS OR STATIONS	LISTEN TO PODCASTS	LISTEN TO AUDIO BOOKS
59.2%	37.6%	14.8%	22.2%	20.9%

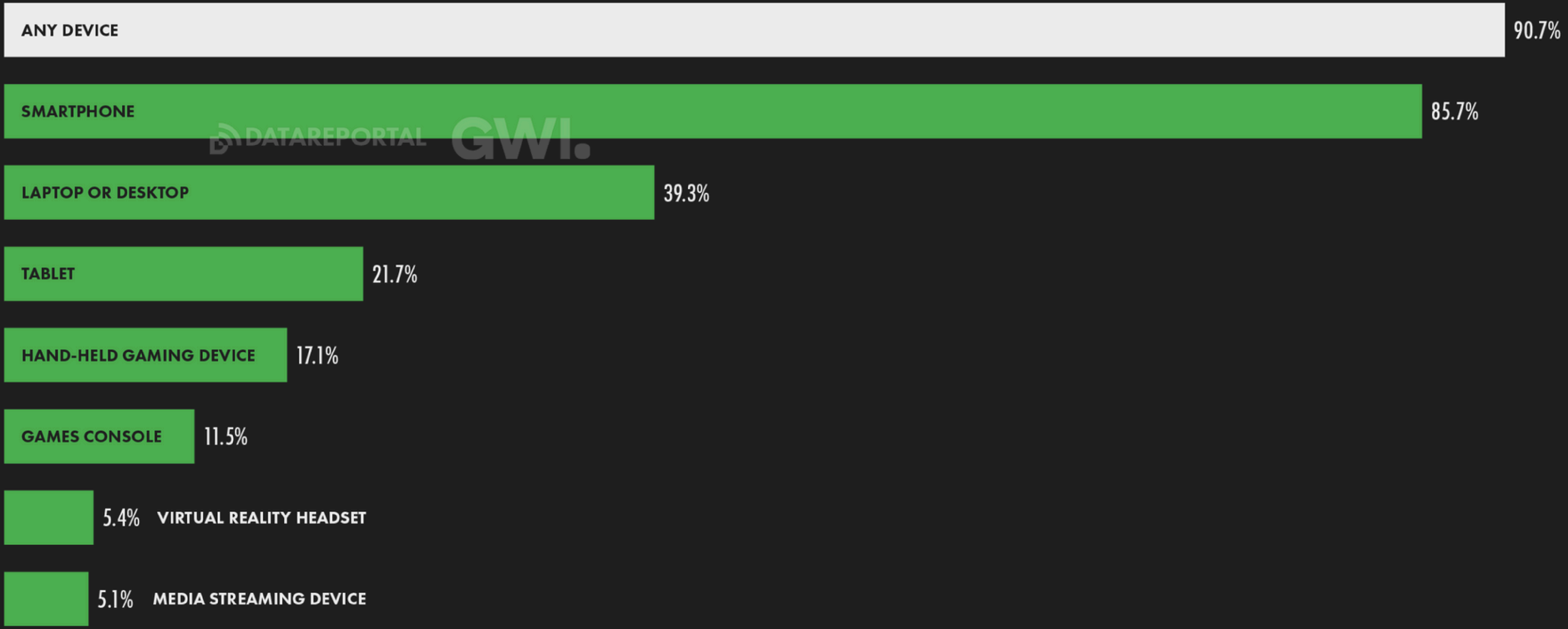
SOURCE: GWI (Q3 2024). COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

FEB 2025

DEVICES USED TO PLAY VIDEO GAMES

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

VIETNAM



SOURCE: GWI (Q3 2024). COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

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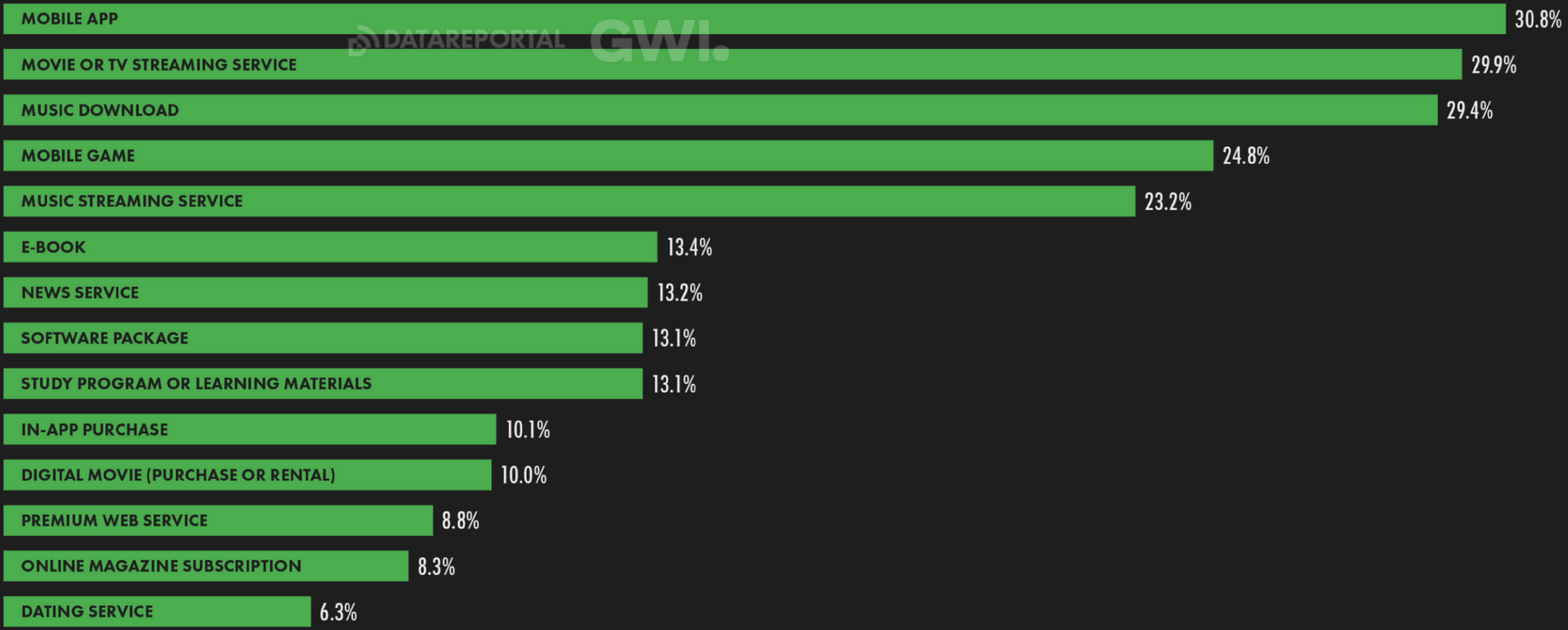
DIGITAL CONTENT PURCHASES

PERCENTAGE OF INTERNET USERS AGED 16+ WHO PAY FOR EACH TYPE OF DIGITAL CONTENT EACH MONTH

VIETNAM



SOURCE: GWI (Q3 2024). COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

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DIGITAL MEDIA SPEND

FULL-YEAR 2024 SPEND ON DIGITAL MEDIA SUBSCRIPTIONS AND DOWNLOADS (IN U.S. DOLLARS)

VIETNAM

TOTAL	VIDEO GAMES	VIDEO-ON-DEMAND	EPUBLISHING	DIGITAL MUSIC
$921 MILLION	$457 MILLION	$367 MILLION	$35.6 MILLION	$62.0 MILLION
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
+12.6% (+$103 MILLION)	+12.0% (+$49 MILLION)	+14.3% (+$46 MILLION)	+7.2% (+$2.4 MILLION)	+9.8% (+$5.6 MILLION)

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** FIGURES REPRESENT ESTIMATES FOR FULL-YEAR SPEND IN 2024 IN U.S. DOLLARS, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. INCLUDES CONTENT DOWNLOADS AND SUBSCRIPTIONS TO STREAMING SERVICES AND ONLINE PUBLISHERS. DOES NOT INCLUDE PHYSICAL MEDIA OR USER-GENERATED CONTENT. **COMPARABILITY:** BASE AND CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

FEB 2025

DIGITAL MEDIA ARPU

AVERAGE FULL-YEAR 2024 SPEND (IN U.S. DOLLARS) PER ONLINE PURCHASER OF DIGITAL MEDIA SUBSCRIPTIONS AND DOWNLOADS

VIETNAM

TOTAL	VIDEO GAMES	VIDEO-ON-DEMAND	EPUBLISHING	DIGITAL MUSIC
$38.09	$88.78	$15.17	$6.85	$6.40
PER SHOPPER, PER YEAR	PER SHOPPER, PER YEAR	PER SHOPPER, PER YEAR	PER SHOPPER, PER YEAR	PER SHOPPER, PER YEAR
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
+7.5% (+$2.66)	+6.3% (+$5.28)	+9.1% (+$1.27)	+2.2% (+$0.15)	+7.2% (+$0.43)

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** FIGURES REPRESENT ESTIMATES FOR AVERAGE FULL-YEAR ONLINE SPEND (IN U.S. DOLLARS) PER ONLINE PURCHASER OF EACH MEDIA TYPE IN 2024, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. INCLUDES CONTENT DOWNLOADS AND SUBSCRIPTIONS TO STREAMING SERVICES AND ONLINE PUBLISHERS. DOES NOT INCLUDE PHYSICAL MEDIA OR USER-GENERATED CONTENT. **ADVISORY:** FIGURES FOR INDIVIDUAL FORMATS MAY EXCEED THE VALUE FOR "TOTAL" DUE TO THE DIFFERENT NUMBER OF SHOPPERS IN EACH CATEGORY. **COMPARABILITY:** BASE AND CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

SOCIAL MEDIA USE

OVERVIEW OF SOCIAL MEDIA USE

HEADLINES FOR SOCIAL MEDIA ADOPTION AND USE (NOTE: USER IDENTITIES MAY NOT REPRESENT UNIQUE INDIVIDUALS)

VIETNAM

NUMBER OF SOCIAL MEDIA USER IDENTITIES	QUARTER-ON-QUARTER CHANGE IN SOCIAL MEDIA USER IDENTITIES	YEAR-ON-YEAR CHANGE IN SOCIAL MEDIA USER IDENTITIES	AVERAGE DAILY TIME SPENT USING SOCIAL MEDIA	AVERAGE NUMBER OF SOCIAL PLATFORMS USED EACH MONTH
76.2 MILLION	+3.4% +2.5 MILLION	+4.8% +3.5 MILLION	2H 14M YOY: -7.1% (-10 MINS)	7.1 YOY: +7.6% (+0.5)

SOCIAL MEDIA USER IDENTITIES vs. TOTAL POPULATION	SOCIAL MEDIA USER IDENTITIES AGED 18+ vs. POPULATION AGED 18+	SOCIAL MEDIA USER IDENTITIES vs. INDIVIDUALS USING THE INTERNET	FEMALE SOCIAL MEDIA USER IDENTITIES vs. TOTAL SOCIAL MEDIA USER IDENTITIES	MALE SOCIAL MEDIA USER IDENTITIES vs. TOTAL SOCIAL MEDIA USER IDENTITIES
75.2%	103.5%	95.4%	51.2%	48.8%

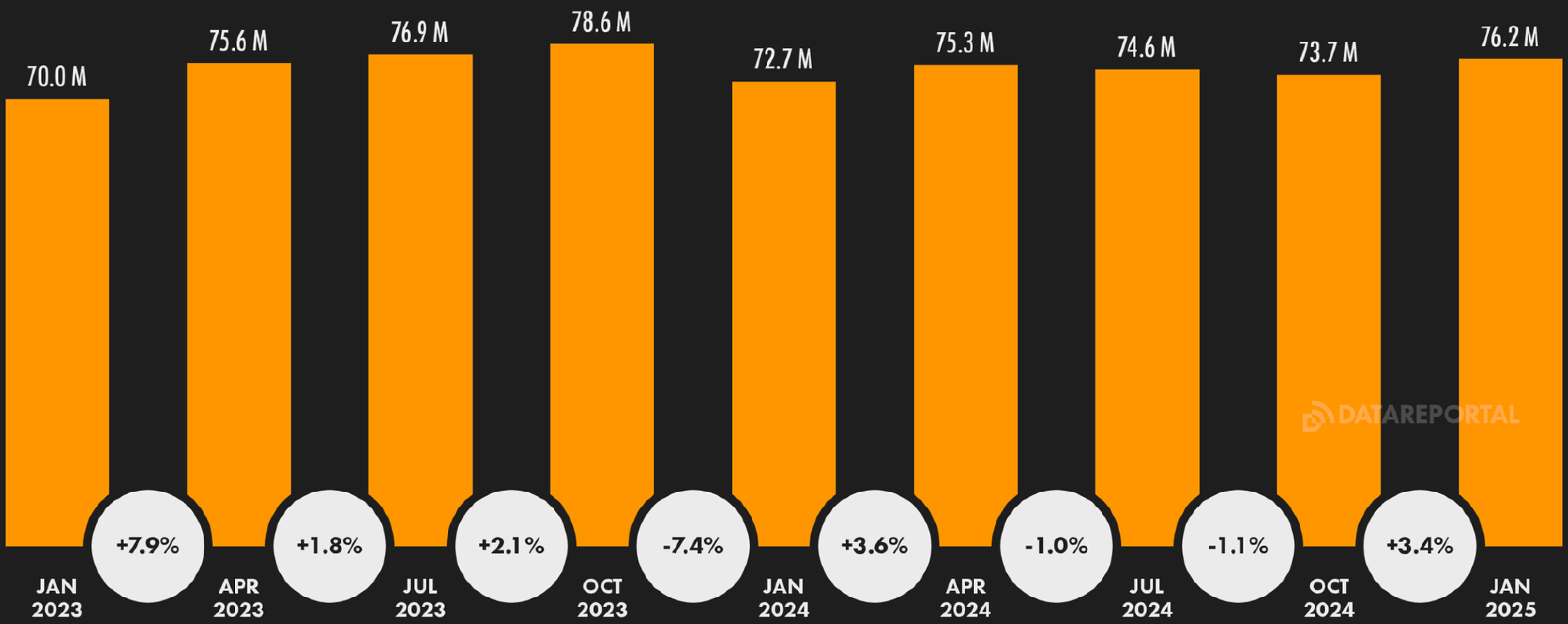
SOURCES: KEPIOS ANALYSIS; COMPANY ADVERTISING RESOURCES; CNNIC; BETA RESEARCH CENTER; OCDH; U.N.; GWI (Q3 2024). **NOTES:** WHERE PRESENT, "[BASE REVISIONS]" INDICATES THAT VALUES FOR TRENDS OVER TIME ARE NOT REPRESENTATIVE OF CHANGES IN ACTUAL SOCIAL MEDIA USE. AVERAGE NUMBER OF PLATFORMS INCLUDES DATA FOR YOUTUBE. **ADVISORY:** SOCIAL MEDIA USER IDENTITIES MAY NOT REPRESENT UNIQUE INDIVIDUALS. COMPARISONS WITH POPULATION AND INTERNET USERS MAY EXCEED 100% DUE TO DUPLICATE AND FAKE ACCOUNTS, USER AGE MISSTATEMENTS, DIFFERENT REPORTING PERIODS, AND DIFFERENCES BETWEEN CENSUS COUNTS AND RESIDENT POPULATIONS. **COMPARABILITY:** SOURCE AND METHODOLOGY CHANGES; BASE REVISIONS. SEE NOTES ON DATA.

FEB
2025

SOCIAL MEDIA USE OVER TIME (QOQ)

NUMBER OF SOCIAL MEDIA USER IDENTITIES, AND QUARTERLY RATE OF CHANGE (NOTE: USER IDENTITIES MAY NOT REPRESENT UNIQUE INDIVIDUALS)

VIETNAM

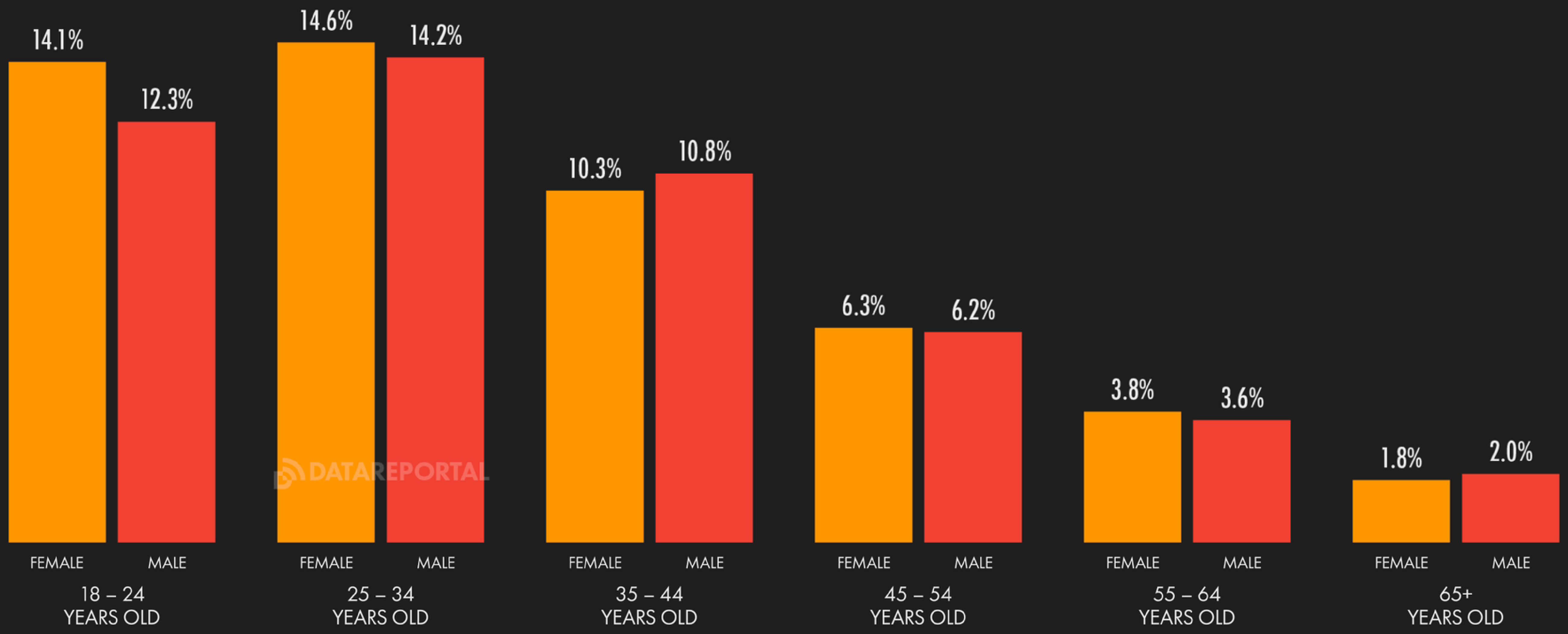


SOURCES: KEPIOS ANALYSIS; COMPANY ADVERTISING RESOURCES AND ANNOUNCEMENTS; CNNIC; BETA RESEARCH CENTER; MEDIASCOPE; OCDH. **NOTE:** WHERE LETTERS ARE SHOWN NEXT TO FIGURES ABOVE BARS, "K" DENOTES THOUSANDS (E.G. "123 K" = 123,000), "M" DENOTES MILLIONS (E.G. "1.23 M" = 1,230,000), AND "B" DENOTES BILLIONS (E.G. "1.23 B" = 1,230,000,000). WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. **ADVISORY:** SOCIAL MEDIA USER IDENTITIES MAY NOT REPRESENT UNIQUE INDIVIDUALS. **COMPARABILITY:** SOURCE AND METHODOLOGY CHANGES; BASE REVISIONS. SEE NOTES ON DATA.

DEMOGRAPHIC PROFILE: META'S ADULT AUDIENCE

SHARE OF COMBINED, DEDUPLICATED AD REACH FOR USERS AGED 18+ ACROSS FACEBOOK, INSTAGRAM, AND MESSENGER, BY AGE AND GENDER

VIETNAM



SOURCES: META'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES USE MIDPOINTS OF PUBLISHED RANGES. **NOTE:** META'S ADVERTISING TOOLS NO LONGER PROVIDE DEMOGRAPHIC DATA FOR USERS BELOW THE AGE OF 18, SO WHILE THERE MAY BE ACTIVE USERS OF THE COMPANY'S PLATFORMS BELOW THIS AGE, THESE USERS NO LONGER APPEAR IN THE COMPANY'S POTENTIAL AD REACH DATA. GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE". **ADVISORY:** VALUES MAY NOT MATCH SHARE OF TOTAL ACTIVE USER BASE. USER AGE MISSTATEMENTS MAY DISTORT SOURCE DATA. **COMPARABILITY:** SOURCE DATA INCONSISTENCIES MAY MEAN THAT VALUES SHOWN HERE DO NOT CORRELATE WITH VALUES SHOWN ELSEWHERE IN THIS REPORT. BASE REVISIONS. SEE NOTES ON DATA.

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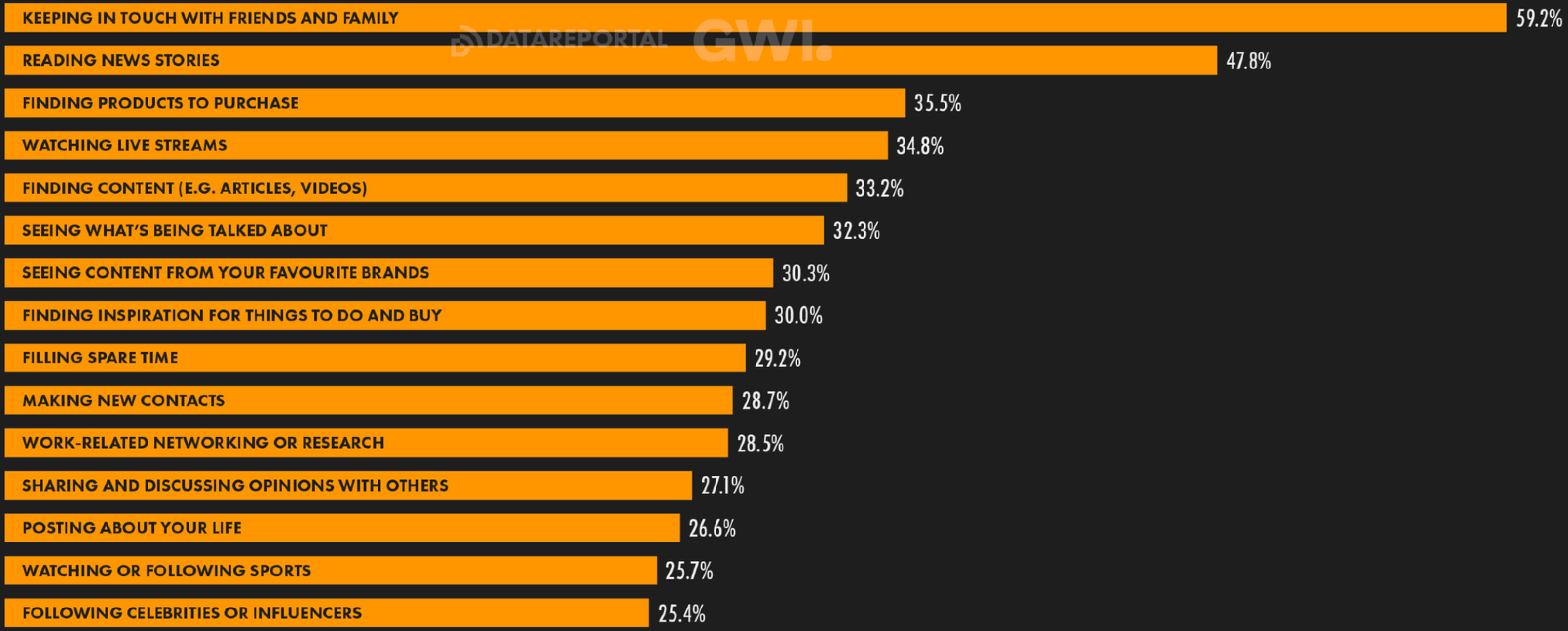
MAIN REASONS FOR USING SOCIAL MEDIA

PRIMARY REASONS WHY SOCIAL MEDIA USERS AGED 16+ USE SOCIAL MEDIA PLATFORMS

VIETNAM



SOURCE: GWI (Q3 2024). **NOTE:** FIGURES REPRESENT THE SHARE OF INTERNET USERS AGED 16+ WHO REPORT USING AT LEAST ONE SOCIAL MEDIA PLATFORM OR MESSENGER SERVICE IN THE PAST MONTH. **COMPARABILITY:** CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

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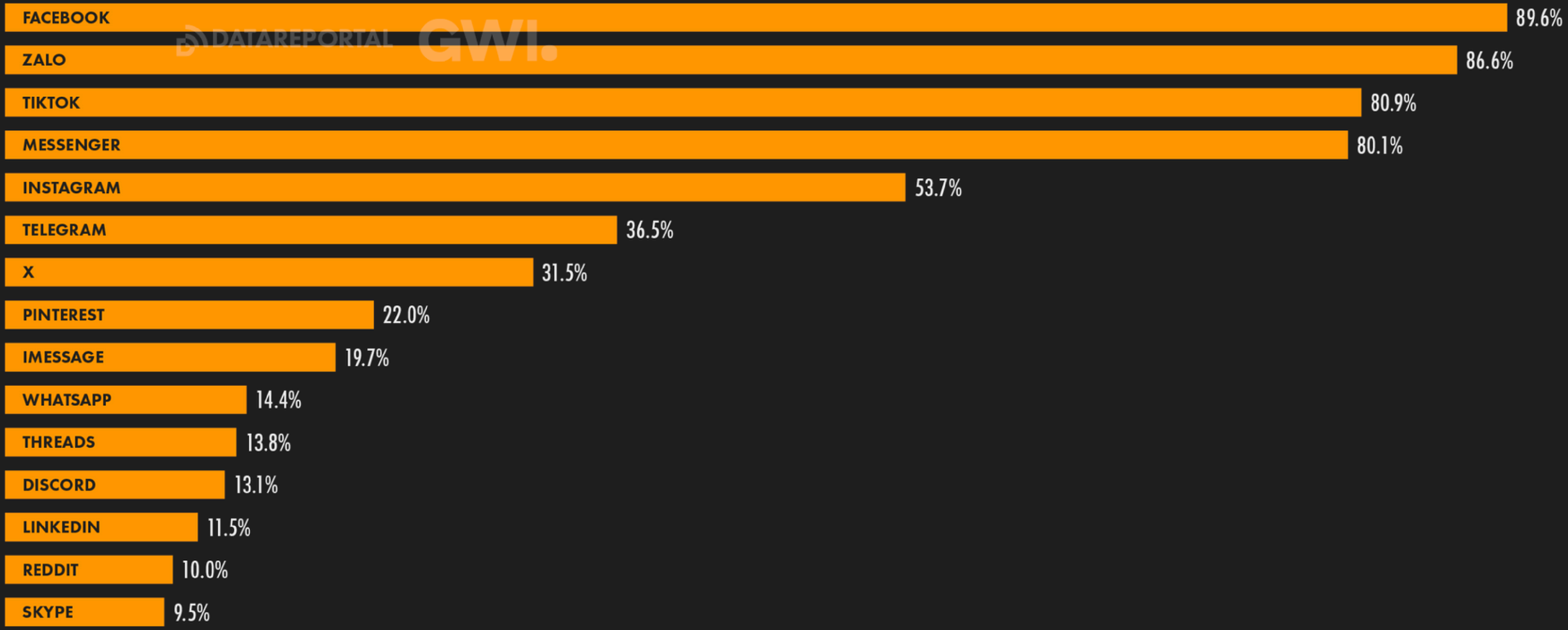
MOST USED SOCIAL MEDIA PLATFORMS

PERCENTAGE OF INTERNET USERS AGED 16+ WHO USE EACH PLATFORM EACH MONTH

NOTE: YOUTUBE IS NOT OFFERED AS AN ANSWER OPTION FOR THIS QUESTION IN GWI'S SURVEY, SO IT WILL NOT APPEAR IN THIS RANKING

VIETNAM



SOURCE: GWI (Q3 2024). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16+. SEE GWI.COM. **NOTE:** YOUTUBE IS NOT OFFERED AS AN ANSWER OPTION FOR THIS QUESTION IN GWI'S SURVEY.

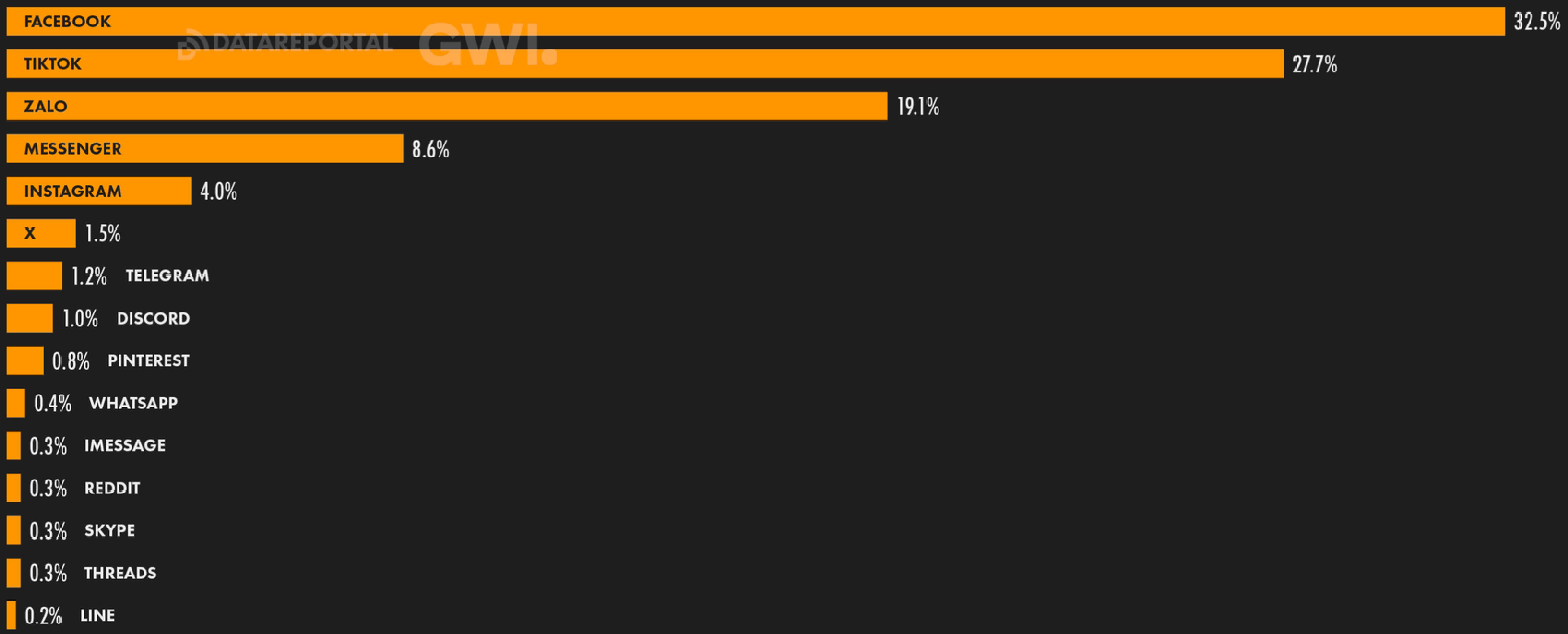
FEB 2025

FAVOURITE SOCIAL MEDIA PLATFORMS

PERCENTAGE OF ACTIVE SOCIAL MEDIA USERS AGED 16+ WHO SAY THAT EACH OPTION IS THEIR "FAVOURITE" SOCIAL MEDIA PLATFORM

NOTE: YOUTUBE IS NOT AVAILABLE AS AN ANSWER OPTION IN THE SURVEY QUESTION THAT INFORMS THIS CHART

VIETNAM



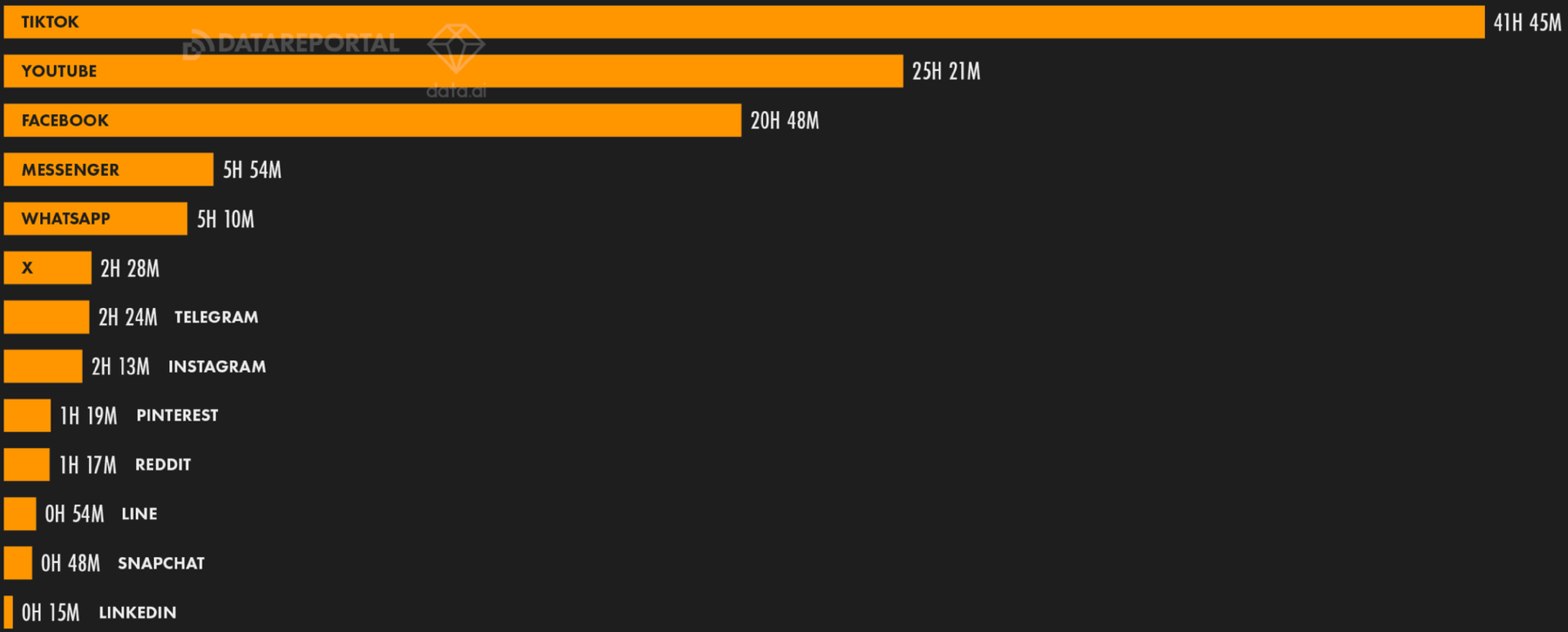
SOURCE: GWI (Q3 2024). NOTES: ONLY INCLUDES INTERNET USERS AGED 16+ WHO HAVE USED AT LEAST ONE SOCIAL MEDIA PLATFORM IN THE PAST MONTH. SURVEY RESPONDENTS COULD CHOOSE FROM OTHER OPTIONS NOT SHOWN ON THIS CHART, SO VALUES MAY NOT SUM TO 100%. YOUTUBE IS NOT AVAILABLE AS AN ANSWER FOR THIS QUESTION IN GWI'S SURVEY. COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

FEB 2025

SOCIAL MEDIA APPS: AVERAGE TIME PER USER

AVERAGE TIME PER MONTH THAT ACTIVE USERS SPENT USING EACH PLATFORM'S ANDROID APP IN NOVEMBER 2024

VIETNAM



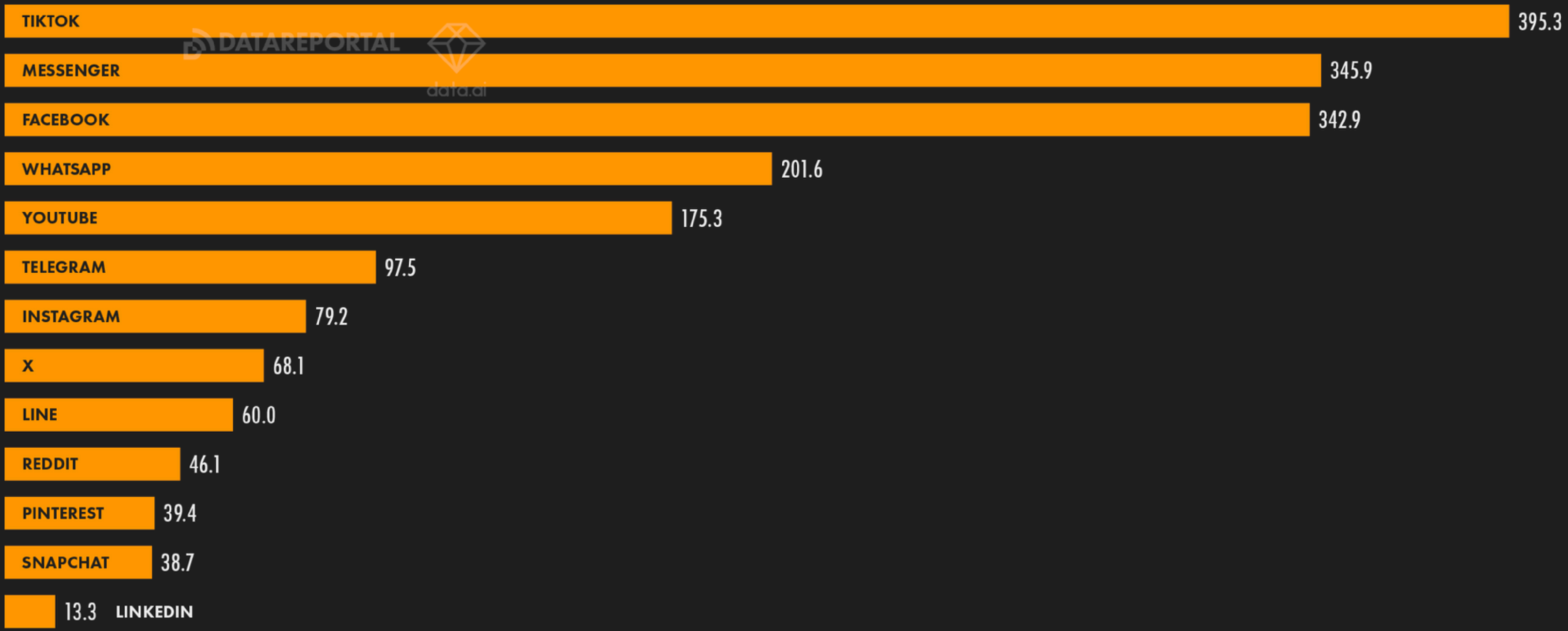
SOURCE: DATA.AI (A SENSOR TOWER COMPANY). NOTE: ONLY INCLUDES DATA FOR A SELECTION OF THE WORLD'S MOST USED SOCIAL MEDIA APPS. FIGURES REPRESENT AVERAGE TIME SPENT (IN HOURS AND MINUTES) PER USER, PER MONTH USING EACH PLATFORM'S MOBILE APP ON ANDROID PHONES IN NOVEMBER 2024.

FEB 2025

SOCIAL MEDIA APPS: AVERAGE MONTHLY SESSIONS

AVERAGE NUMBER OF TIMES THAT ACTIVE USERS OF EACH PLATFORM'S ANDROID APP OPEN THE RESPECTIVE APP EACH MONTH

VIETNAM



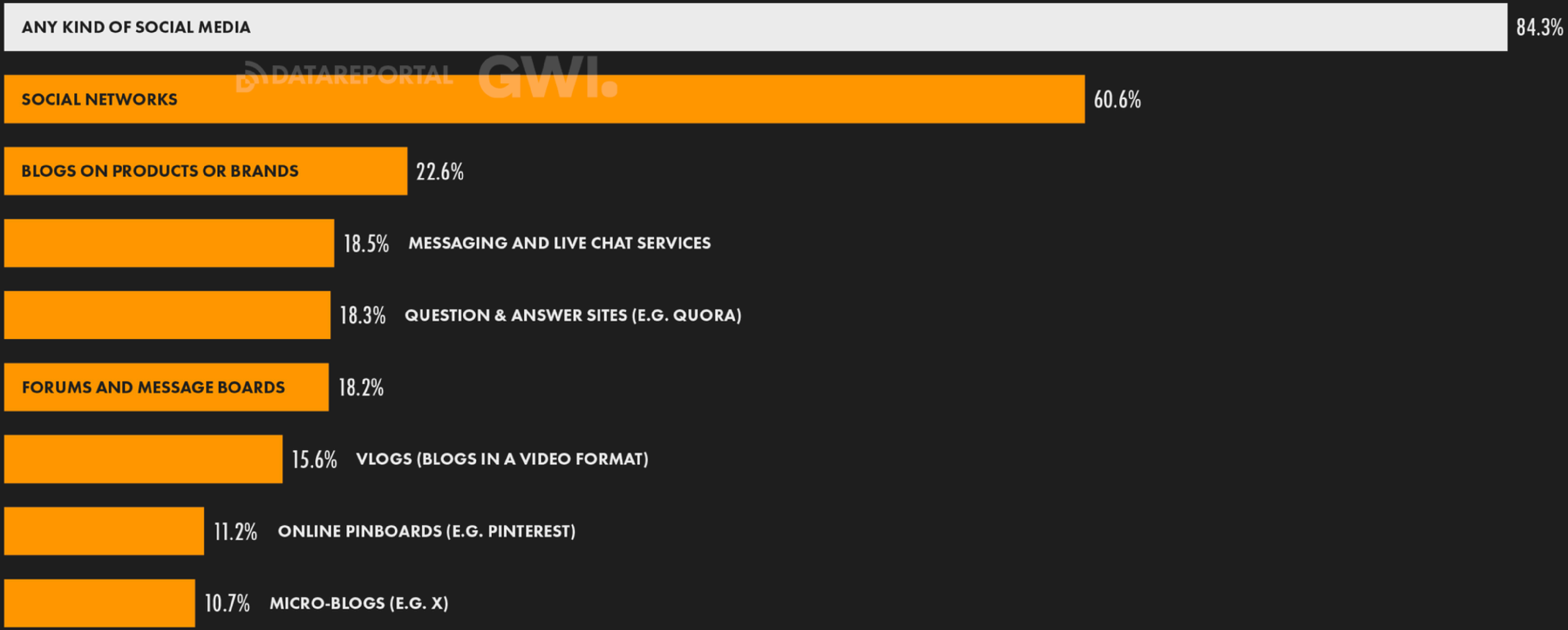
SOURCE: DATA.AI (A SENSOR TOWER COMPANY). **NOTE:** ONLY INCLUDES DATA FOR A SELECTION OF THE WORLD'S MOST USED SOCIAL MEDIA APPS. "ACTIVE USERS" DENOTE USERS WHO OPEN THE RESPECTIVE PLATFORM'S APP ON AN ANDROID PHONE AT LEAST ONCE IN A GIVEN CALENDAR MONTH. FIGURES REPRESENT THE AVERAGE NUMBER OF TIMES THAT ACTIVE USERS OF THE RESPECTIVE PLATFORM'S ANDROID APP OPENED THAT APP EACH MONTH IN NOVEMBER 2024.

FEB 2025

USE OF SOCIAL MEDIA FOR BRAND RESEARCH

PERCENTAGE OF INTERNET USERS AGED 16+ WHO USE EACH SOCIAL MEDIA CHANNEL TO FIND INFORMATION ABOUT BRANDS AND PRODUCTS

VIETNAM



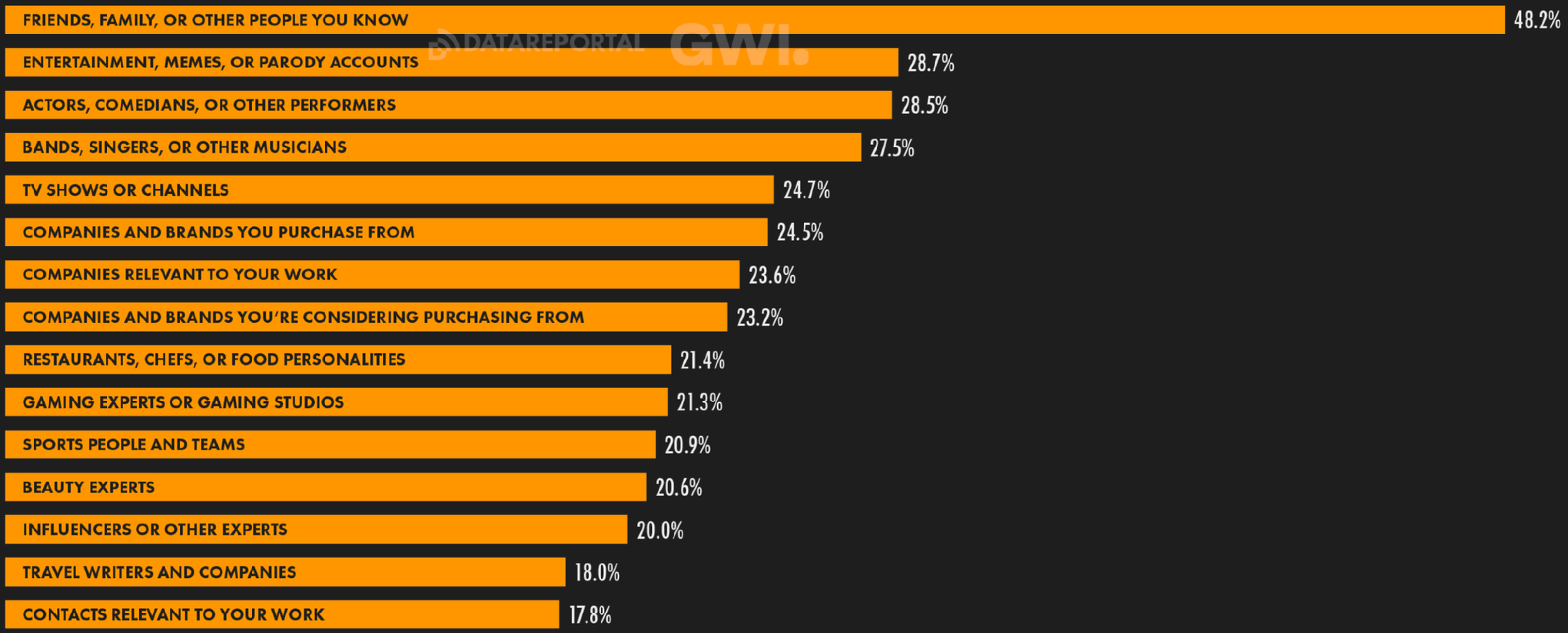
SOURCE: GWI (Q3 2024). **NOTE:** VALUES FOR "ANY KIND OF SOCIAL MEDIA" REPRESENT SOCIAL MEDIA USERS WHO SELECTED AT LEAST ONE OF THE INDIVIDUAL CHANNELS SHOWN ON THIS CHART.
COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

FEB 2025

SOCIAL MEDIA ACCOUNT TYPES FOLLOWED

PERCENTAGE OF SOCIAL MEDIA USERS AGED 16+ WHO FOLLOW EACH TYPE OF ACCOUNT ON SOCIAL MEDIA

VIETNAM



SOURCE: GWI (Q3 2024). NOTE: ONLY INCLUDES INTERNET USERS AGED 16+ WHO HAVE USED AT LEAST ONE SOCIAL MEDIA PLATFORM IN THE PAST MONTH. COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

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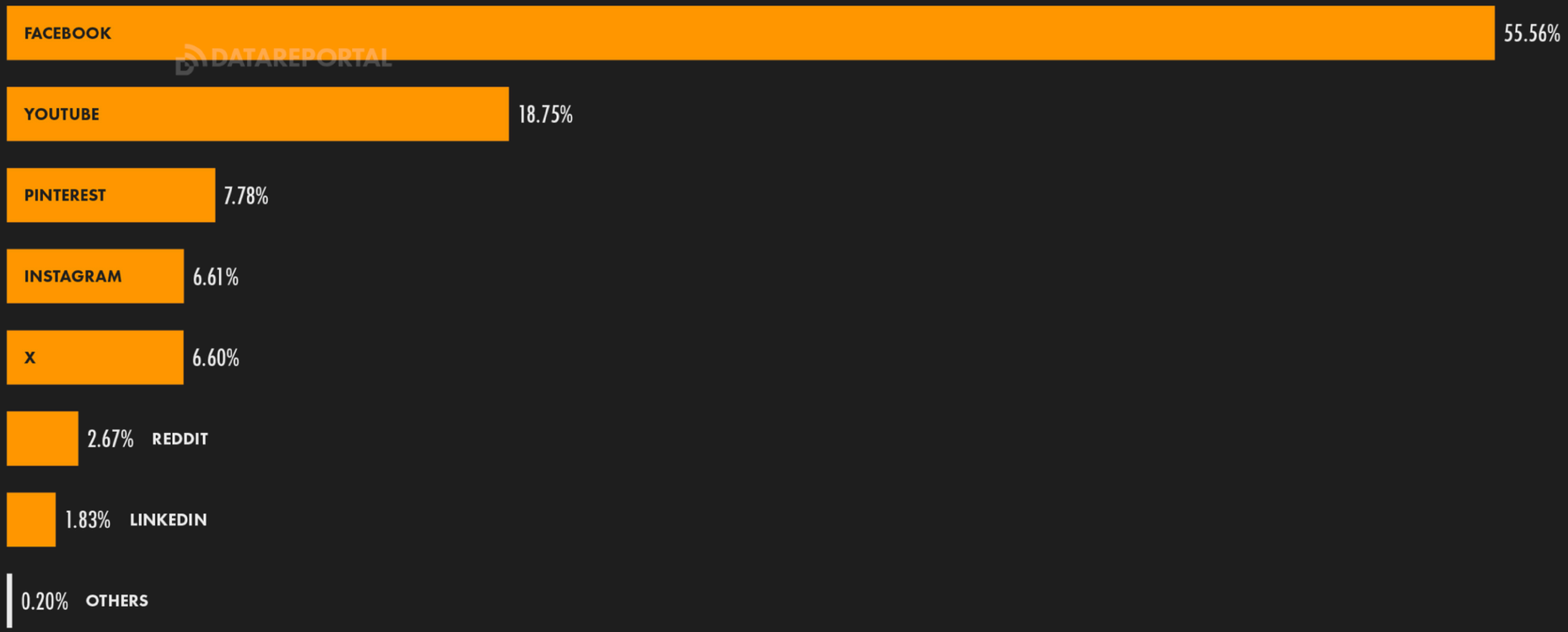
WEB TRAFFIC REFERRALS FROM SOCIAL MEDIA

SHARE OF WEB TRAFFIC ARRIVING ON THIRD-PARTY WEBSITES VIA CLICKS OR TAPS ON LINKS PUBLISHED IN SOCIAL MEDIA PLATFORMS (ANY DEVICE)

VIETNAM



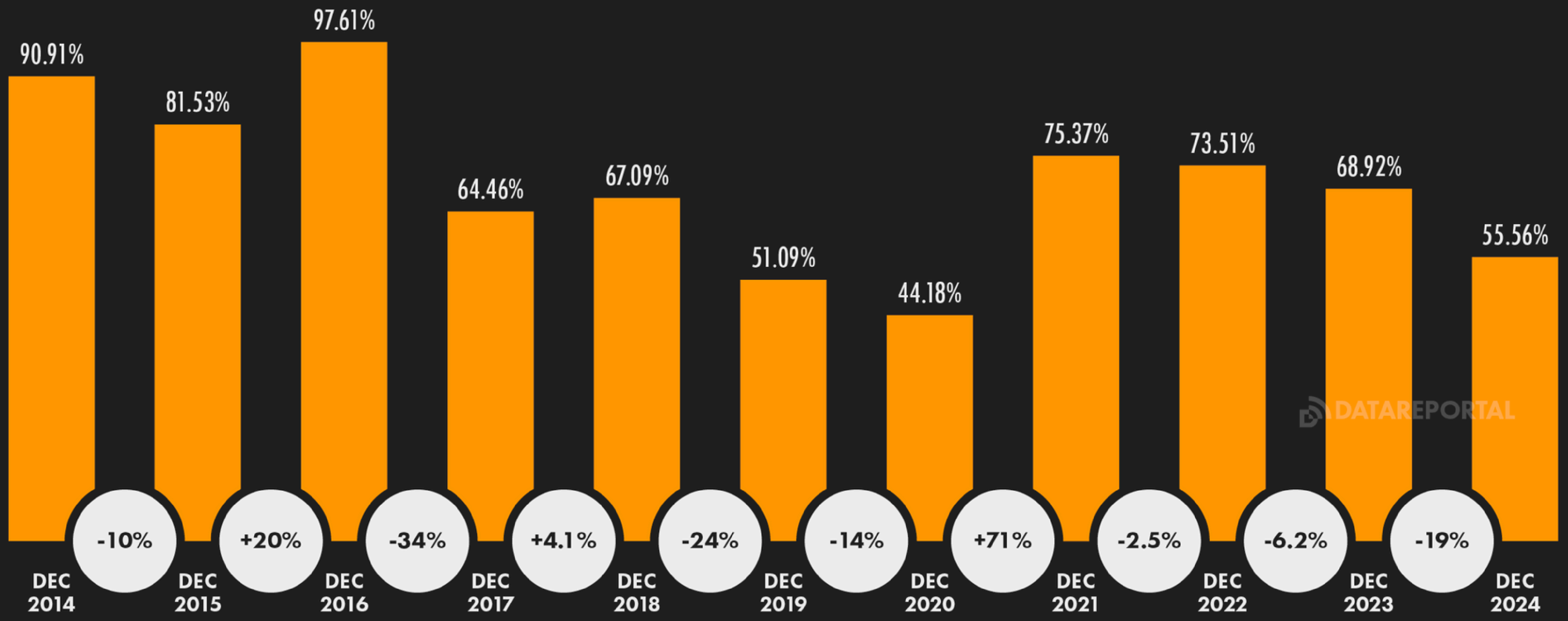
SOURCE: STATCOUNTER. **NOTES:** SHARE DOES NOT INCLUDE TRAFFIC FROM MESSENGER PLATFORMS. DATA ARE ONLY AVAILABLE FOR A SELECTION OF PLATFORMS, AND PERCENTAGES REFLECT SHARE OF AVAILABLE PLATFORMS ONLY. FIGURES REPRESENT THE SHARE OF WEB TRAFFIC ARRIVING ON THIRD-PARTY WEBSITES VIA CLICKS OR TAPS ON LINKS PUBLISHED ON EACH PLATFORM AS A PERCENTAGE OF TOTAL WEB TRAFFIC ARRIVING FROM THE AVAILABLE SELECTION OF SOCIAL PLATFORMS IN DECEMBER 2024. FIGURES MAY NOT SUM TO 100% DUE TO ROUNDING.

FEB 2025

FACEBOOK'S SHARE OF SOCIAL MEDIA REFERRALS

WEB TRAFFIC REFERRED BY FACEBOOK AS A PERCENTAGE OF WEB TRAFFIC REFERRED BY SOCIAL MEDIA PLATFORMS (ANY DEVICE)

VIETNAM



SOURCE: STATCOUNTER. **NOTES:** DATA ARE ONLY AVAILABLE FOR A SELECTION OF PLATFORMS, AND PERCENTAGES REFLECT FACEBOOK'S SHARE OF AVAILABLE PLATFORMS ONLY. FIGURES REPRESENT THE SHARE OF WEB TRAFFIC ARRIVING ON THIRD-PARTY WEBSITES VIA CLICKS OR TAPS ON LINKS PUBLISHED ON FACEBOOK AS A PERCENTAGE OF TOTAL WEB PAGE TRAFFIC ARRIVING FROM THE AVAILABLE SELECTION OF SOCIAL MEDIA PLATFORMS IN DECEMBER 2024.

YOUTUBE

FEB 2025

YOUTUBE: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON YOUTUBE

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM

TOTAL POTENTIAL REACH OF ADS ON YOUTUBE

62.3 MILLION

YOUTUBE AD REACH vs. TOTAL POPULATION

61.5%

YOUTUBE AD REACH vs. TOTAL INTERNET USERS

78.0%

QUARTER-ON-QUARTER CHANGE IN REPORTED YOUTUBE AD REACH

0%
[UNCHANGED]

YEAR-ON-YEAR CHANGE IN REPORTED YOUTUBE AD REACH

-1.1%
-700 THOUSAND

SHARE: FEMALE YOUTUBE AD REACH AGED 18+ vs. OVERALL YOUTUBE AD REACH AGED 18+

48.5%

SHARE: MALE YOUTUBE AD REACH AGED 18+ vs. OVERALL YOUTUBE AD REACH AGED 18+

51.5%

ADOPTION: OVERALL YOUTUBE AD REACH AGED 18+ vs. OVERALL POPULATION AGED 18+

72.6%

ADOPTION: FEMALE YOUTUBE AD REACH AGED 18+ vs. FEMALE POPULATION AGED 18+

67.7%

ADOPTION: MALE YOUTUBE AD REACH AGED 18+ vs. MALE POPULATION AGED 18+

77.9%

SOURCES: GOOGLE'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** AGE AND GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE" USERS AGED 18+. SOURCE DATA FOR REACH BY GENDER MAY NOT SUM TO PUBLISHED TOTAL, SO FIGURES FOR ADOPTION BY GENDER MAY NOT CORRELATE WITH FIGURES FOR OVERALL ADOPTION. **ADVISORY:** REACH MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES COMPARING REACH WITH POPULATION AND INTERNET USERS MAY EXCEED 100% DUE TO USER AGE MISSTATEMENTS, DUPLICATE AND FAKE ACCOUNTS, DIFFERING RESEARCH DATES, AND CHANGES IN RESIDENT POPULATIONS. **COMPARABILITY:** BASE REVISIONS. VALUES FOR CHANGE OVER TIME MAY BE DISTORTED. SEE NOTES ON DATA.

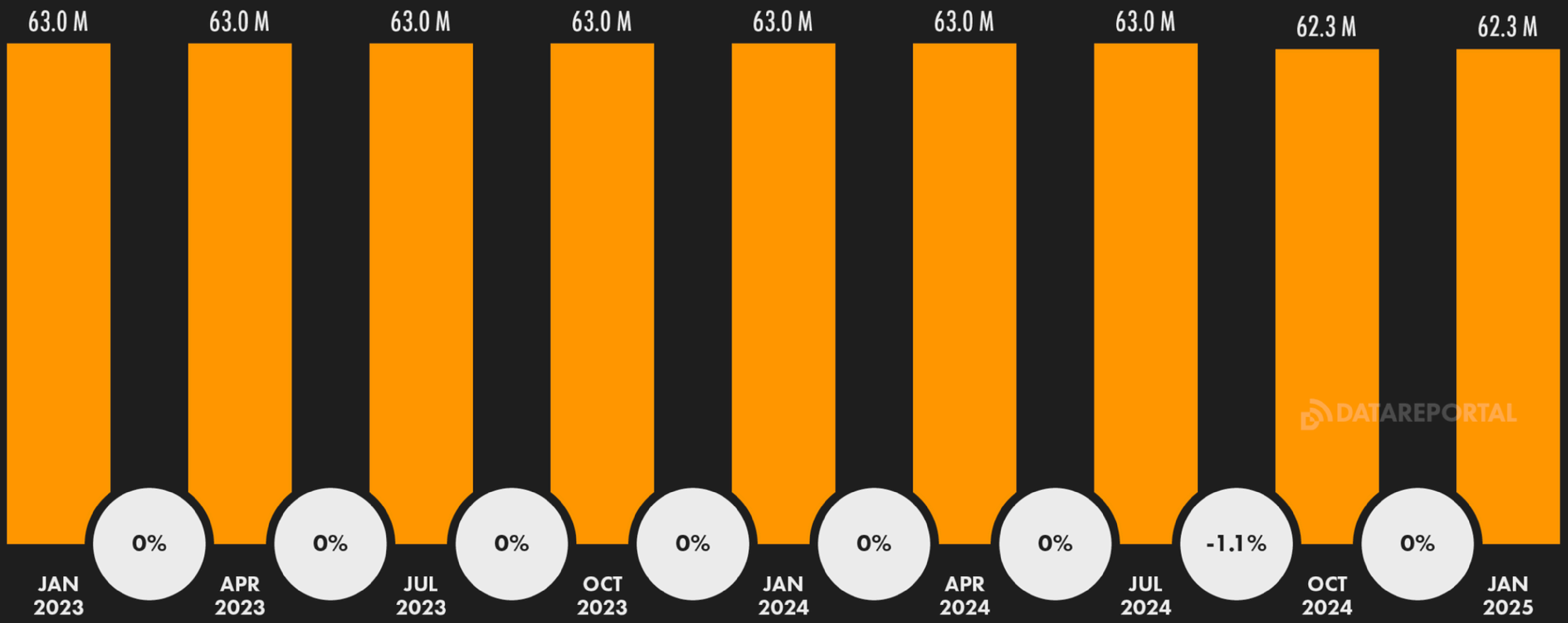
FEB 2025

YOUTUBE: REPORTED ADVERTISING REACH

TOTAL POTENTIAL AUDIENCE REACH OF ADS ON YOUTUBE, AND CHANGE IN REPORTED REACH OVER TIME

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM



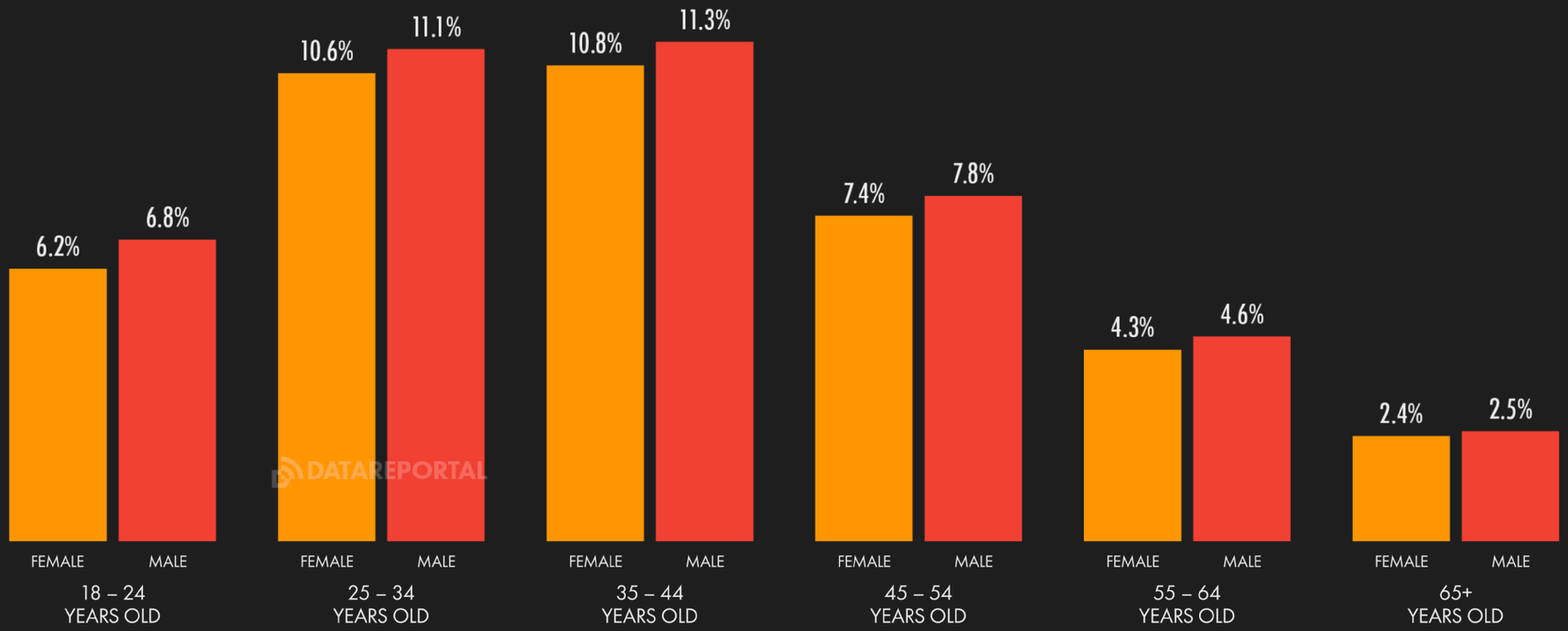
SOURCES: GOOGLE'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** WHERE LETTERS ARE SHOWN NEXT TO FIGURES ABOVE BARS, "K" DENOTES THOUSANDS, "M" DENOTES MILLIONS, AND "B" DENOTES BILLIONS. WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. **ADVISORY:** REACH MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. **COMPARABILITY:** IN ADDITION TO CHANGES IN ACTIVE USER NUMBERS, SOURCE DATA REVISIONS AND CORRECTIONS MAY RESULT IN MEANINGFUL CHANGES IN REPORTED REACH, WHICH MAY SIGNIFICANTLY DISTORT VALUES FOR CHANGE OVER TIME. SEE NOTES ON DATA.

YOUTUBE: ADVERTISING AUDIENCE PROFILE

SHARE OF YOUTUBE'S ADVERTISING AUDIENCE BY AGE GROUP AND GENDER

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM



SOURCES: GOOGLE'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** AGE AND GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE" USERS AGED 18+, BUT GOOGLE'S RESOURCES ALSO PUBLISH A VALUE FOR TOTAL AUDIENCE. VALUES SHOWN HERE REPRESENT SHARE OF TOTAL AUDIENCE, SO WILL NOT SUM TO 100%. **ADVISORY:** VALUES MAY NOT MATCH SHARE OF TOTAL ACTIVE USER BASE. USER AGE MISSTATEMENTS MAY DISTORT SOURCE DATA. **COMPARABILITY:** SOURCE DATA INCONSISTENCIES MAY MEAN THAT VALUES SHOWN HERE DO NOT CORRELATE WITH VALUES SHOWN ELSEWHERE IN THIS REPORT. BASE REVISIONS. SEE NOTES ON DATA.

FEB 2025

TOP YOUTUBE SEARCHES

QUERIES WITH THE GREATEST VOLUME OF YOUTUBE SEARCH ACTIVITY BETWEEN 01 JANUARY 2024 AND 31 DECEMBER 2024

VIETNAM

#	SEARCH QUERY	INDEX
01	KARAOKE	100
02	NHẠC	89
03	PHIM	74
04	CON	65
05	REMIX	58
06	REVIEW PHIM	25
07	MA	24
08	NHAC	24
09	DORAEMON	19
10	XỔ SỐ	18

#	SEARCH QUERY	INDEX
11	NHẠC REMIX	17
12	TIKTOK	17
13	ĂN	15
14	ANIME	13
15	NHẠC KARAOKE	12
16	CON VỊT	10
17	BÀI HÁT	10
18	CA NHẠC	9
19	CONAN	9
20	KARAOKE REMIX	9

SOURCE: GOOGLE TRENDS, BASED ON SEARCHES CONDUCTED ON YOUTUBE BETWEEN 01 JANUARY 2024 AND 31 DECEMBER 2024. **NOTE:** ANY SPELLING ERRORS OR LANGUAGE INCONSISTENCIES IN SEARCH QUERIES ARE AS PUBLISHED BY GOOGLE TRENDS, AND ARE SHOWN "AS IS", TO ENABLE READERS TO IDENTIFY POTENTIAL CHANGES IN HOW PEOPLE ENTER WRITTEN LANGUAGE IN DIGITAL ENVIRONMENTS. GOOGLE DOES NOT PUBLISH ABSOLUTE SEARCH VOLUMES, BUT THE "INDEX" COLUMN SHOWS RELATIVE SEARCH VOLUMES FOR EACH QUERY COMPARED WITH THE SEARCH VOLUME OF THE TOP QUERY. **ADVISORY:** GOOGLE TRENDS USES DYNAMIC SAMPLING, SO RANK ORDER AND INDEX VALUES MAY VARY DEPENDING ON WHEN THE TOOL IS ACCESSED, EVEN FOR THE SAME TIME PERIOD.

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FACEBOOK

FACEBOOK: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON FACEBOOK

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM

TOTAL POTENTIAL REACH OF ADS ON FACEBOOK	FACEBOOK AD REACH vs. TOTAL POPULATION	FACEBOOK AD REACH vs. TOTAL INTERNET USERS	QUARTER-ON-QUARTER CHANGE IN REPORTED FACEBOOK AD REACH	YEAR-ON-YEAR CHANGE IN REPORTED FACEBOOK AD REACH
76.2 MILLION	75.2%	95.4%	+3.4% +2.50 MILLION	+4.8% +3.50 MILLION

SHARE: FEMALE FACEBOOK AD REACH AGED 18+ vs. OVERALL FACEBOOK AD REACH AGED 18+	SHARE: MALE FACEBOOK AD REACH AGED 18+ vs. OVERALL FACEBOOK AD REACH AGED 18+	ADOPTION: OVERALL FACEBOOK AD REACH AGED 18+ vs. OVERALL POPULATION AGED 18+	ADOPTION: FEMALE FACEBOOK AD REACH AGED 18+ vs. FEMALE POPULATION AGED 18+	ADOPTION: MALE FACEBOOK AD REACH AGED 18+ vs. MALE POPULATION AGED 18+
51.2%	48.8%	103.5%	100.9%	104.2%

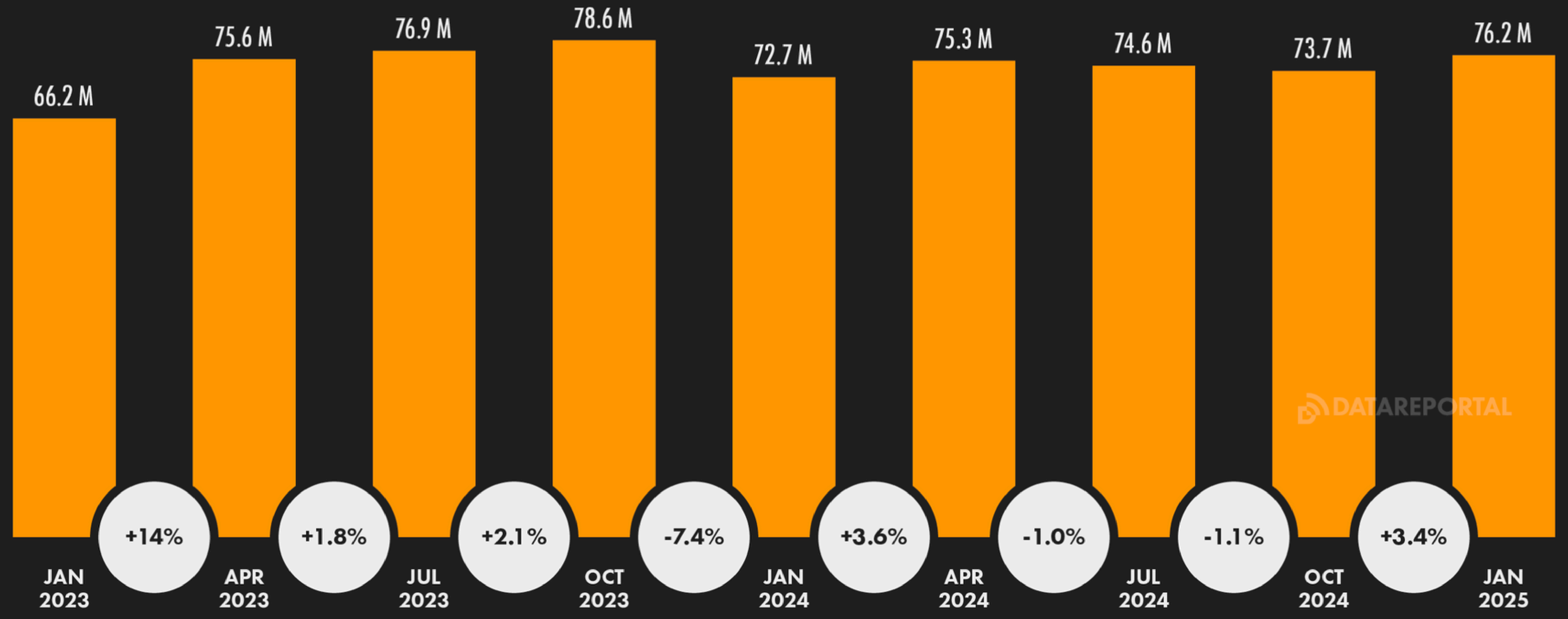
SOURCES: META'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES BASED ON MIDPOINTS OF PUBLISHED RANGES. GENDER DATA ONLY AVAILABLE FOR "FEMALE" AND "MALE". SOURCE DATA FOR REACH BY GENDER MAY NOT SUM TO PUBLISHED TOTAL, SO FIGURES FOR ADOPTION BY GENDER MAY NOT CORRELATE WITH FIGURES FOR OVERALL ADOPTION. **ADVISORY:** REACH MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES COMPARING REACH WITH POPULATION AND INTERNET USERS MAY EXCEED 100% DUE TO USER AGE MISSTATEMENTS, DUPLICATE AND FAKE ACCOUNTS, DIFFERING RESEARCH DATES, AND CHANGES IN RESIDENT POPULATIONS. **COMPARABILITY:** BASE REVISIONS. VALUES FOR CHANGE OVER TIME MAY BE DISTORTED. SEE NOTES ON DATA.

FACEBOOK: REPORTED ADVERTISING REACH

TOTAL POTENTIAL AUDIENCE REACH OF ADS ON FACEBOOK, AND CHANGE IN REPORTED REACH OVER TIME

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM



SOURCES: META'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES USE MIDPOINTS OF PUBLISHED RANGES. WHERE LETTERS ARE SHOWN NEXT TO FIGURES ABOVE BARS, "K" DENOTES THOUSANDS (E.G. "123 K" = 123,000), "M" DENOTES MILLIONS (E.G. "1.23 M" = 1,230,000), AND "B" DENOTES BILLIONS (E.G. "1.23 B" = 1,230,000,000). WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. **ADVISORY:** REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS, OR MATCH THE TOTAL ACTIVE USER BASE. **COMPARABILITY:** IN ADDITION TO CHANGES IN ACTIVE USER NUMBERS, BASE REVISIONS AND CORRECTIONS MAY RESULT IN MEANINGFUL CHANGES IN REPORTED REACH, AND SUCH ADJUSTMENTS MAY SIGNIFICANTLY DISTORT VALUES FOR CHANGE OVER TIME. SEE NOTES ON DATA.

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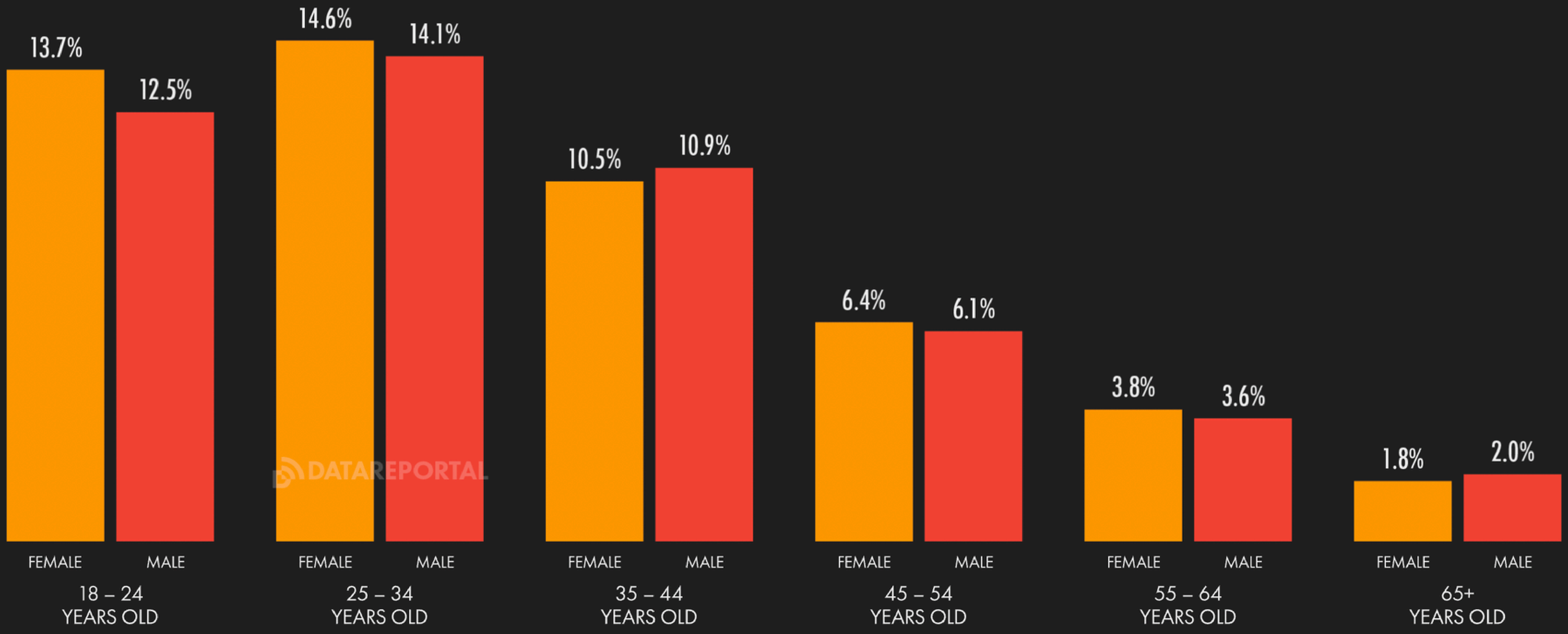
FACEBOOK: ADVERTISING AUDIENCE PROFILE

SHARE OF FACEBOOK'S ADULT ADVERTISING AUDIENCE AGED 18+ BY AGE GROUP AND GENDER

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM



SOURCES: META'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES USE MIDPOINTS OF PUBLISHED RANGES. **NOTE:** META'S ADVERTISING TOOLS NO LONGER PROVIDE DEMOGRAPHIC DATA FOR USERS BELOW THE AGE OF 18, SO WHILE THERE MAY BE ACTIVE USERS OF THE COMPANY'S PLATFORMS BELOW THIS AGE, THESE USERS NO LONGER APPEAR IN THE COMPANY'S POTENTIAL AD REACH DATA. GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE". **ADVISORY:** VALUES MAY NOT MATCH SHARE OF TOTAL ACTIVE USER BASE. USER AGE MISSTATEMENTS MAY DISTORT SOURCE DATA. **COMPARABILITY:** SOURCE DATA INCONSISTENCIES MAY MEAN THAT VALUES SHOWN HERE DO NOT CORRELATE WITH VALUES SHOWN ELSEWHERE IN THIS REPORT. BASE REVISIONS. SEE NOTES ON DATA.

FEB 2025

FACEBOOK ENGAGEMENT RATES: LOCOWISE

FACEBOOK PAGE POST ENGAGEMENTS AS A PERCENTAGE OF TOTAL PAGE FANS, AS REPORTED BY LOCOWISE

VIETNAM

AVERAGE FACEBOOK PAGE POST ENGAGEMENTS vs. PAGE FANS: ALL POST TYPES	AVERAGE FACEBOOK PAGE POST ENGAGEMENTS vs. PAGE FANS: PHOTO POSTS	AVERAGE FACEBOOK PAGE POST ENGAGEMENTS vs. PAGE FANS: VIDEO POSTS	AVERAGE FACEBOOK PAGE POST ENGAGEMENTS vs. PAGE FANS: LINK POSTS	AVERAGE FACEBOOK PAGE POST ENGAGEMENTS vs. PAGE FANS: STATUS POSTS
0.03%	0.10%	0.05%	0.004%	0.01%

SOURCE: LOCOWISE. FIGURES REPRESENT AVERAGES FOR THE PERIOD BETWEEN 01 SEPTEMBER AND 30 NOVEMBER 2024. **NOTES:** PERCENTAGES COMPARE THE COMBINED TOTAL OF REACTIONS, COMMENTS, AND SHARES WITH THE TOTAL NUMBER OF PAGE FANS. FIGURES ARE AVERAGES BASED ON A WIDE VARIETY OF DIFFERENT KINDS OF PAGE, WITH DIFFERENT AUDIENCE SIZES, IN VARIOUS GEOGRAPHIES.

INSTAGRAM

INSTAGRAM: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON INSTAGRAM

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM

TOTAL POTENTIAL REACH OF ADS ON INSTAGRAM	INSTAGRAM AD REACH vs. TOTAL POPULATION	INSTAGRAM AD REACH vs. TOTAL INTERNET USERS	QUARTER-ON-QUARTER CHANGE IN REPORTED INSTAGRAM AD REACH	YEAR-ON-YEAR CHANGE IN REPORTED INSTAGRAM AD REACH
10.6 MILLION	10.4%	13.2%	+2.4% +250 THOUSAND	-3.2% -350 THOUSAND

SHARE: FEMALE INSTAGRAM AD REACH AGED 18+ vs. OVERALL INSTAGRAM AD REACH AGED 18+	SHARE: MALE INSTAGRAM AD REACH AGED 18+ vs. OVERALL INSTAGRAM AD REACH AGED 18+	ADOPTION: OVERALL INSTAGRAM AD REACH AGED 18+ vs. OVERALL POPULATION AGED 18+	ADOPTION: FEMALE INSTAGRAM AD REACH AGED 18+ vs. FEMALE POPULATION AGED 18+	ADOPTION: MALE INSTAGRAM AD REACH AGED 18+ vs. MALE POPULATION AGED 18+
57.8%	42.2%	14.2%	15.9%	12.6%

SOURCES: META'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES BASED ON MIDPOINTS OF PUBLISHED RANGES. GENDER DATA ONLY AVAILABLE FOR "FEMALE" AND "MALE". SOURCE DATA FOR REACH BY GENDER MAY NOT SUM TO PUBLISHED TOTAL, SO FIGURES FOR ADOPTION BY GENDER MAY NOT CORRELATE WITH FIGURES FOR OVERALL ADOPTION. **ADVISORY:** REACH MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES COMPARING REACH WITH POPULATION AND INTERNET USERS MAY EXCEED 100% DUE TO USER AGE MISSTATEMENTS, DUPLICATE AND FAKE ACCOUNTS, DIFFERING RESEARCH DATES, AND CHANGES IN RESIDENT POPULATIONS. **COMPARABILITY:** BASE REVISIONS. VALUES FOR CHANGE OVER TIME MAY BE DISTORTED. SEE NOTES ON DATA.

INSTAGRAM: REPORTED ADVERTISING REACH

TOTAL POTENTIAL AUDIENCE REACH OF ADS ON INSTAGRAM, AND CHANGE IN REPORTED REACH OVER TIME

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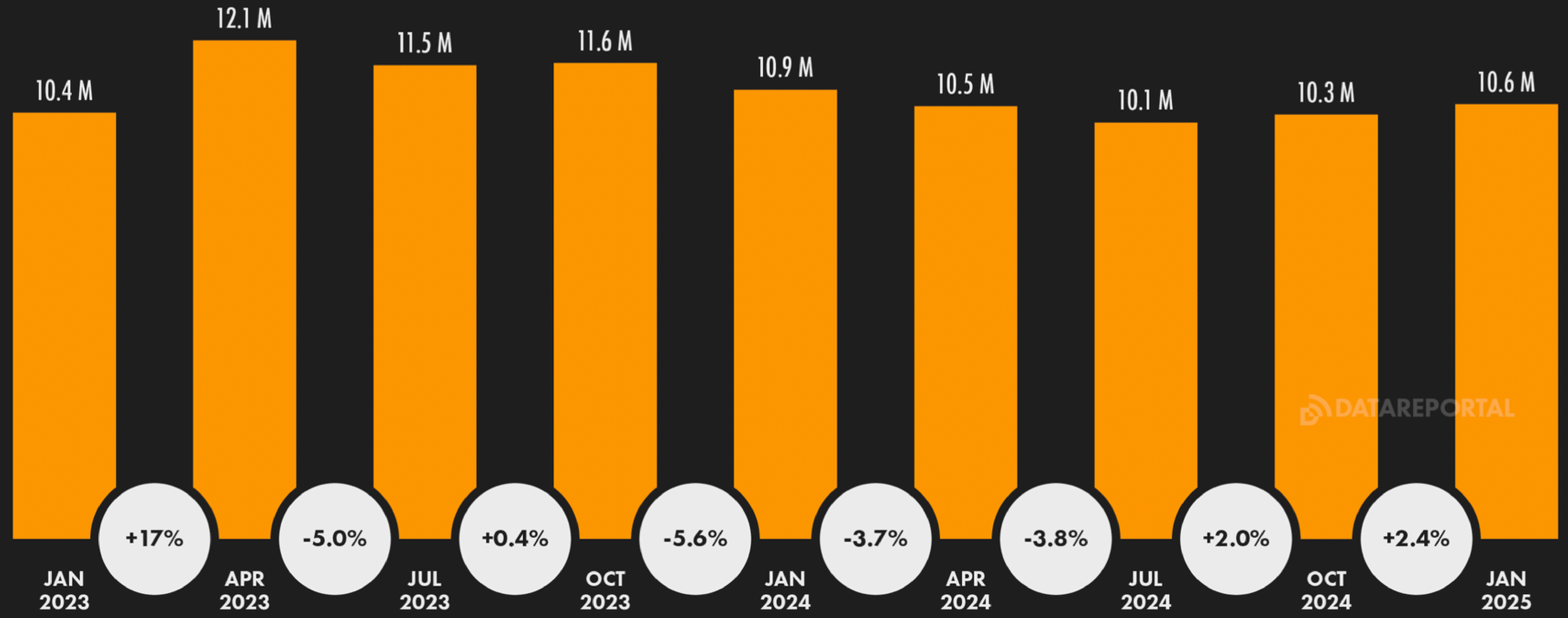


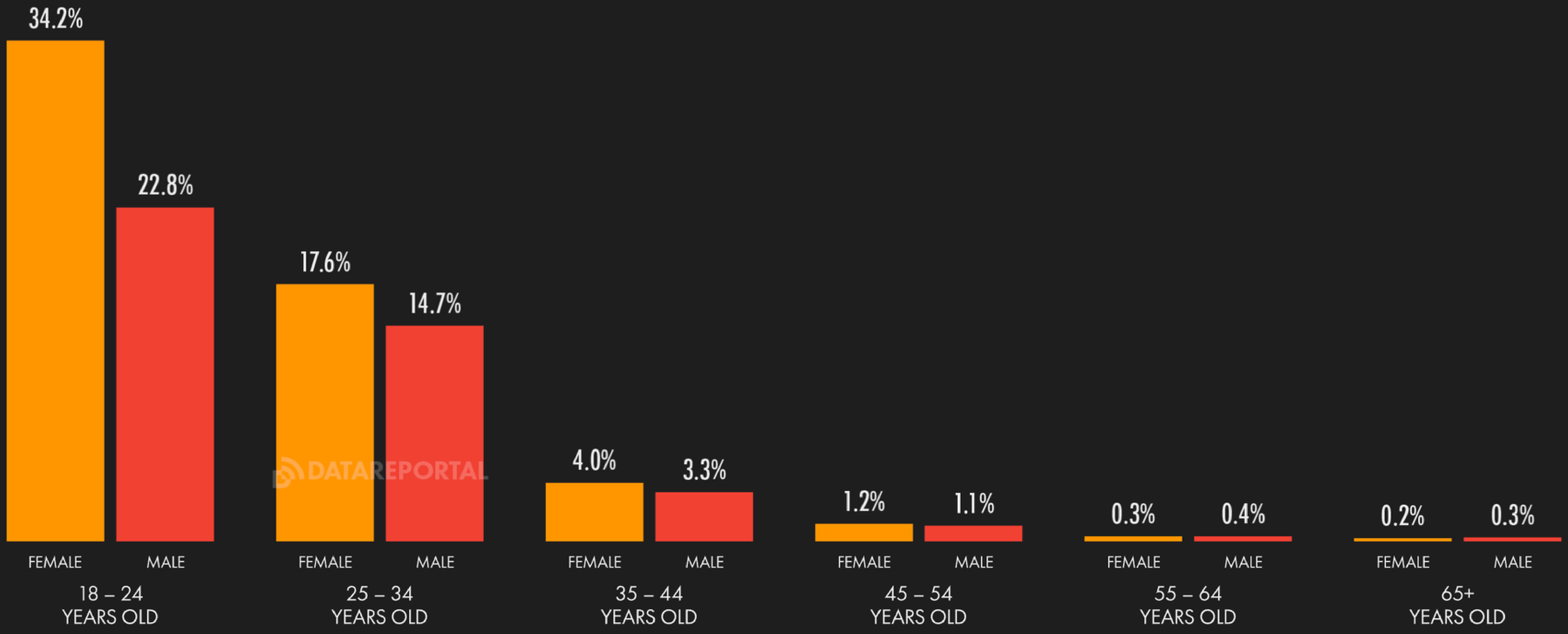
SOURCES: META'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES USE MIDPOINTS OF PUBLISHED RANGES. WHERE LETTERS ARE SHOWN NEXT TO FIGURES ABOVE BARS, "K" DENOTES THOUSANDS (E.G. "123 K" = 123,000), "M" DENOTES MILLIONS (E.G. "1.23 M" = 1,230,000), AND "B" DENOTES BILLIONS (E.G. "1.23 B" = 1,230,000,000). WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. **ADVISORY:** REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS, OR MATCH THE TOTAL ACTIVE USER BASE. **COMPARABILITY:** IN ADDITION TO CHANGES IN ACTIVE USER NUMBERS, SOURCE DATA REVISIONS AND CORRECTIONS MAY RESULT IN MEANINGFUL CHANGES IN REPORTED REACH, AND SUCH ADJUSTMENTS MAY SIGNIFICANTLY DISTORT VALUES FOR CHANGE OVER TIME. SEE NOTES ON DATA.

INSTAGRAM: ADVERTISING AUDIENCE PROFILE

SHARE OF INSTAGRAM'S ADULT ADVERTISING AUDIENCE AGED 18+ BY AGE GROUP AND GENDER

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM



SOURCES: META'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES USE MIDPOINTS OF PUBLISHED RANGES. **NOTE:** META'S ADVERTISING TOOLS NO LONGER PROVIDE DEMOGRAPHIC DATA FOR USERS BELOW THE AGE OF 18, SO WHILE THERE MAY BE ACTIVE USERS OF THE COMPANY'S PLATFORMS BELOW THIS AGE, THESE USERS NO LONGER APPEAR IN THE COMPANY'S POTENTIAL AD REACH DATA. GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE". **ADVISORY:** VALUES MAY NOT MATCH SHARE OF TOTAL ACTIVE USER BASE. USER AGE MISSTATEMENTS MAY DISTORT SOURCE DATA. **COMPARABILITY:** SOURCE DATA INCONSISTENCIES MAY MEAN THAT VALUES SHOWN HERE DO NOT CORRELATE WITH VALUES SHOWN ELSEWHERE IN THIS REPORT. BASE REVISIONS. SEE NOTES ON DATA.

TIKTOK

GUIDANCE ON TRENDS IN TIKTOK DATA

Our analysis of the potential advertising reach data published in TikTok's own tools has identified some unusual trends over recent months, and the figures for some geographies have seen large and unexpected declines. However, our analysis of third-party data indicates that there has been **no equivalent decline** in actual platform use during the same time period. As a result, we believe that the declines in TikTok's published ad reach data are likely due to "source corrections" – potentially involving the removal of duplicate accounts, false accounts, and accounts that engage in inauthentic behaviour – and / or a change in the company's reporting methodology. Consequently, readers should **not** interpret any decline in reported TikTok ad reach as being representative of any change in actual TikTok use. However, we've included the platform's published figures "as is", to enable readers to form their own judgements.

FEB 2025

TIKTOK: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE AGED 18+ THAT MARKETERS CAN REACH WITH ADS ON TIKTOK

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM

TOTAL POTENTIAL REACH OF ADS ON TIKTOK	TIKTOK AD REACH vs. TOTAL POPULATION	TIKTOK AD REACH vs. TOTAL INTERNET USERS	QUARTER-ON-QUARTER CHANGE IN REPORTED TIKTOK AD REACH	YEAR-ON-YEAR CHANGE IN REPORTED TIKTOK AD REACH
40.9 MILLION	40.3%	51.2%	-40.9% -28.3 MILLION	-39.7% -26.9 MILLION

SHARE: FEMALE TIKTOK AD REACH AGED 18+ vs. OVERALL TIKTOK AD REACH AGED 18+	SHARE: MALE TIKTOK AD REACH AGED 18+ vs. OVERALL TIKTOK AD REACH AGED 18+	ADOPTION: OVERALL TIKTOK AD REACH AGED 18+ vs. OVERALL POPULATION AGED 18+	ADOPTION: FEMALE TIKTOK AD REACH AGED 18+ vs. FEMALE POPULATION AGED 18+	ADOPTION: MALE TIKTOK AD REACH AGED 18+ vs. MALE POPULATION AGED 18+
48.7%	51.3%	55.6%	52.1%	59.3%

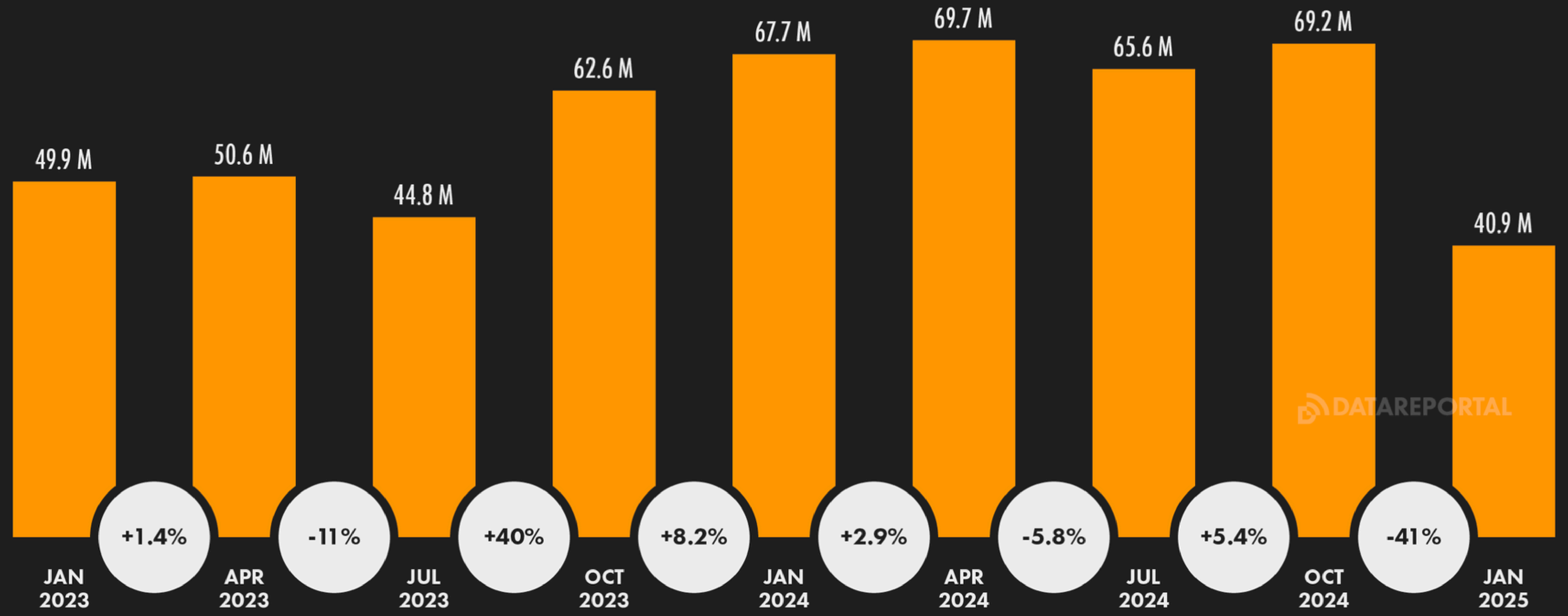
SOURCES: TIKTOK'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** REACH DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE" USERS AGED 18+. VALUES REFLECT MIDPOINTS OF PUBLISHED RANGES. SOURCE DATA FOR REACH BY GENDER MAY NOT SUM TO PUBLISHED TOTAL, SO FIGURES FOR ADOPTION BY GENDER MAY NOT CORRELATE WITH OVERALL ADOPTION. **ADVISORY:** REACH MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES COMPARING REACH WITH POPULATION AND INTERNET USERS MAY EXCEED 100% DUE TO USER AGE MISSTATEMENTS, DUPLICATE AND FAKE ACCOUNTS, DIFFERING RESEARCH DATES, AND CHANGES IN RESIDENT POPULATIONS. **COMPARABILITY:** BASE REVISIONS. VALUES FOR CHANGE OVER TIME MAY BE DISTORTED. SEE NOTES ON DATA.

TIKTOK: REPORTED ADVERTISING REACH

TOTAL POTENTIAL AUDIENCE REACH OF ADS ON TIKTOK, AND CHANGE IN REPORTED REACH OVER TIME

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM



SOURCES: TIKTOK'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES USE MIDPOINTS OF PUBLISHED RANGES. WHERE LETTERS ARE SHOWN NEXT TO BAR VALUES, "K" DENOTES THOUSANDS, "M" DENOTES MILLIONS, AND "B" DENOTES BILLIONS. WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. **ADVISORY:** REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS, OR MATCH THE TOTAL ACTIVE USER BASE. **COMPARABILITY:** IN ADDITION TO CHANGES IN ACTIVE USER NUMBERS, SOURCE DATA REVISIONS AND CORRECTIONS MAY RESULT IN MEANINGFUL CHANGES IN REPORTED REACH, AND SUCH ADJUSTMENTS MAY SIGNIFICANTLY DISTORT VALUES FOR CHANGE OVER TIME. REDUCED AVAILABILITY OF CERTAIN AD FORMATS MAY IMPACT REACH IN SOME COUNTRIES. SEE NOTES ON DATA.

FEB 2025

TIKTOK: ADVERTISING AUDIENCE PROFILE

SHARE OF TIKTOK'S ADULT ADVERTISING AUDIENCE AGED 18+ BY AGE GROUP AND GENDER

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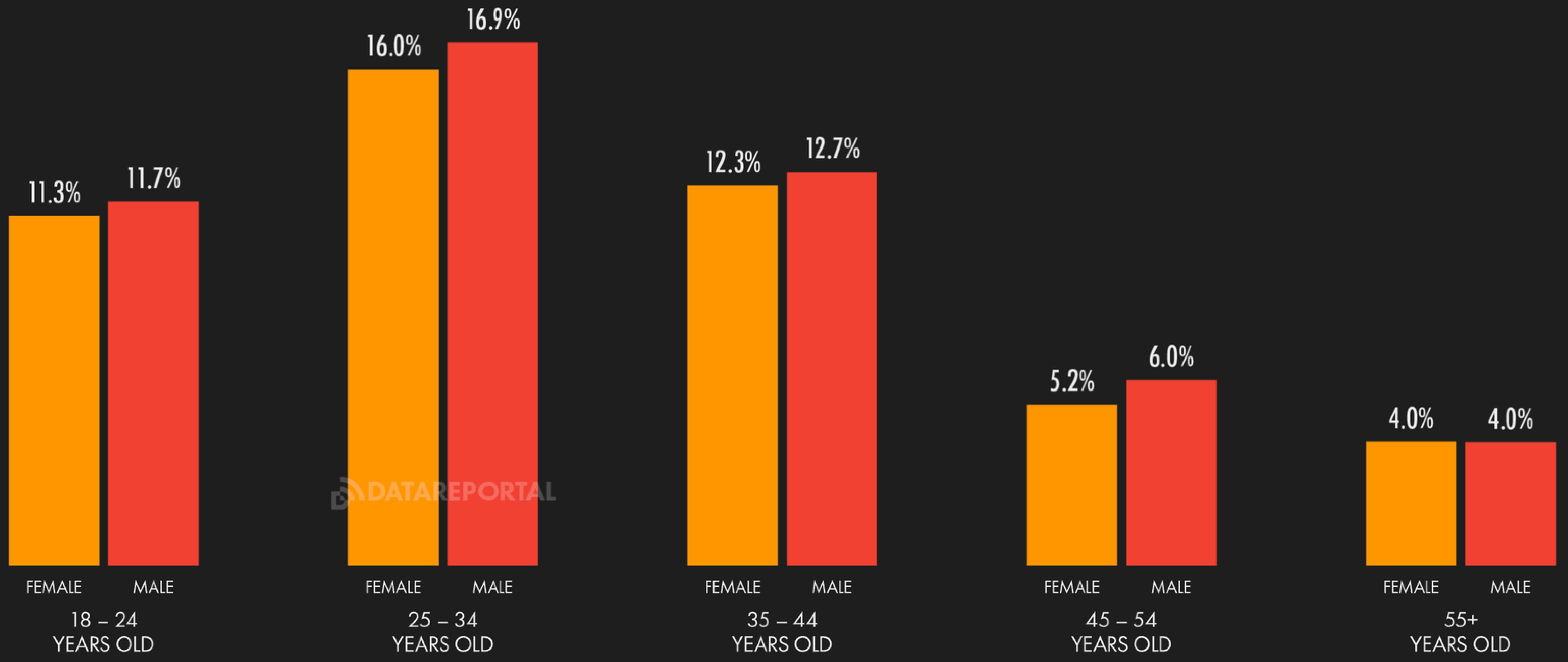
VIETNAM



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LINKEDIN

LINKEDIN: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON LINKEDIN

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM

TOTAL POTENTIAL REACH OF ADS ON LINKEDIN	LINKEDIN AD REACH vs. TOTAL POPULATION	LINKEDIN AD REACH vs. TOTAL INTERNET USERS	QUARTER-ON-QUARTER CHANGE IN REPORTED LINKEDIN AD REACH	YEAR-ON-YEAR CHANGE IN REPORTED LINKEDIN AD REACH
8.90 MILLION	8.8%	11.1%	+3.5% +300 THOUSAND	+18.7% +1.4 MILLION

SHARE: FEMALE LINKEDIN AD REACH AGED 18+ vs. OVERALL LINKEDIN AD REACH AGED 18+	SHARE: MALE LINKEDIN AD REACH AGED 18+ vs. OVERALL LINKEDIN AD REACH AGED 18+	ADOPTION: OVERALL LINKEDIN AD REACH AGED 18+ vs. OVERALL POPULATION AGED 18+	ADOPTION: FEMALE LINKEDIN AD REACH AGED 18+ vs. FEMALE POPULATION AGED 18+	ADOPTION: MALE LINKEDIN AD REACH AGED 18+ vs. MALE POPULATION AGED 18+
50.0%	50.0%	12.1%	6.5%	7.1%

SOURCES: LINKEDIN'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES REFLECT TOTAL REGISTERED "MEMBERS", SO ARE NOT COMPARABLE WITH OTHER PLATFORMS IN THIS REPORT. GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE". FIGURES FOR ADOPTION BY GENDER MAY NOT CORRELATE WITH OVERALL ADOPTION. **ADVISORY:** REACH MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES COMPARING REACH WITH POPULATION AND INTERNET USERS MAY EXCEED 100% DUE TO USER AGE MISSTATEMENTS, DUPLICATE AND FAKE ACCOUNTS, DIFFERING RESEARCH DATES, AND CHANGES IN RESIDENT POPULATIONS. **COMPARABILITY:** BASE REVISIONS. VALUES FOR CHANGE OVER TIME MAY BE DISTORTED. SEE NOTES ON DATA.

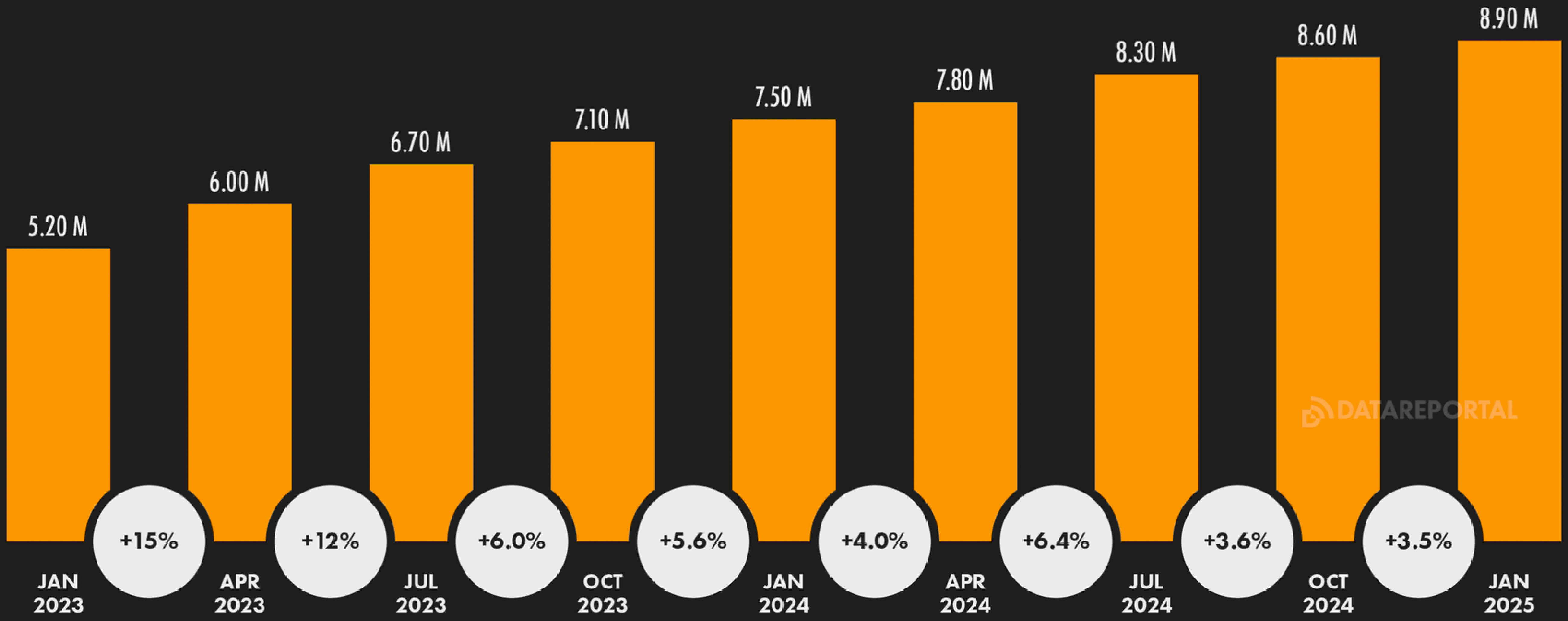
FEB 2025

LINKEDIN: REPORTED ADVERTISING REACH

TOTAL POTENTIAL AUDIENCE REACH OF ADS ON LINKEDIN, AND CHANGE IN REPORTED REACH OVER TIME

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM



SOURCES: LINKEDIN'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTE:** VALUES ARE BASED ON TOTAL REGISTERED MEMBERS, SO ARE NOT COMPARABLE WITH OTHER PLATFORMS IN THIS REPORT. WHERE LETTERS ARE SHOWN NEXT TO BAR VALUES, "K" DENOTES THOUSANDS, "M" DENOTES MILLIONS, AND "B" DENOTES BILLIONS. WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. **ADVISORY:** REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS, OR MATCH THE TOTAL ACTIVE USER OR REGISTERED MEMBER BASE. **COMPARABILITY:** IN ADDITION TO CHANGES IN USER NUMBERS, SOURCE DATA REVISIONS AND CORRECTIONS MAY RESULT IN MEANINGFUL CHANGES IN REPORTED REACH, AND SUCH ADJUSTMENTS MAY SIGNIFICANTLY DISTORT VALUES FOR CHANGE OVER TIME. SEE NOTES ON DATA.

FEB 2025

LINKEDIN: ADVERTISING AUDIENCE PROFILE

SHARE OF LINKEDIN'S ADVERTISING AUDIENCE BY AGE GROUP AND GENDER

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

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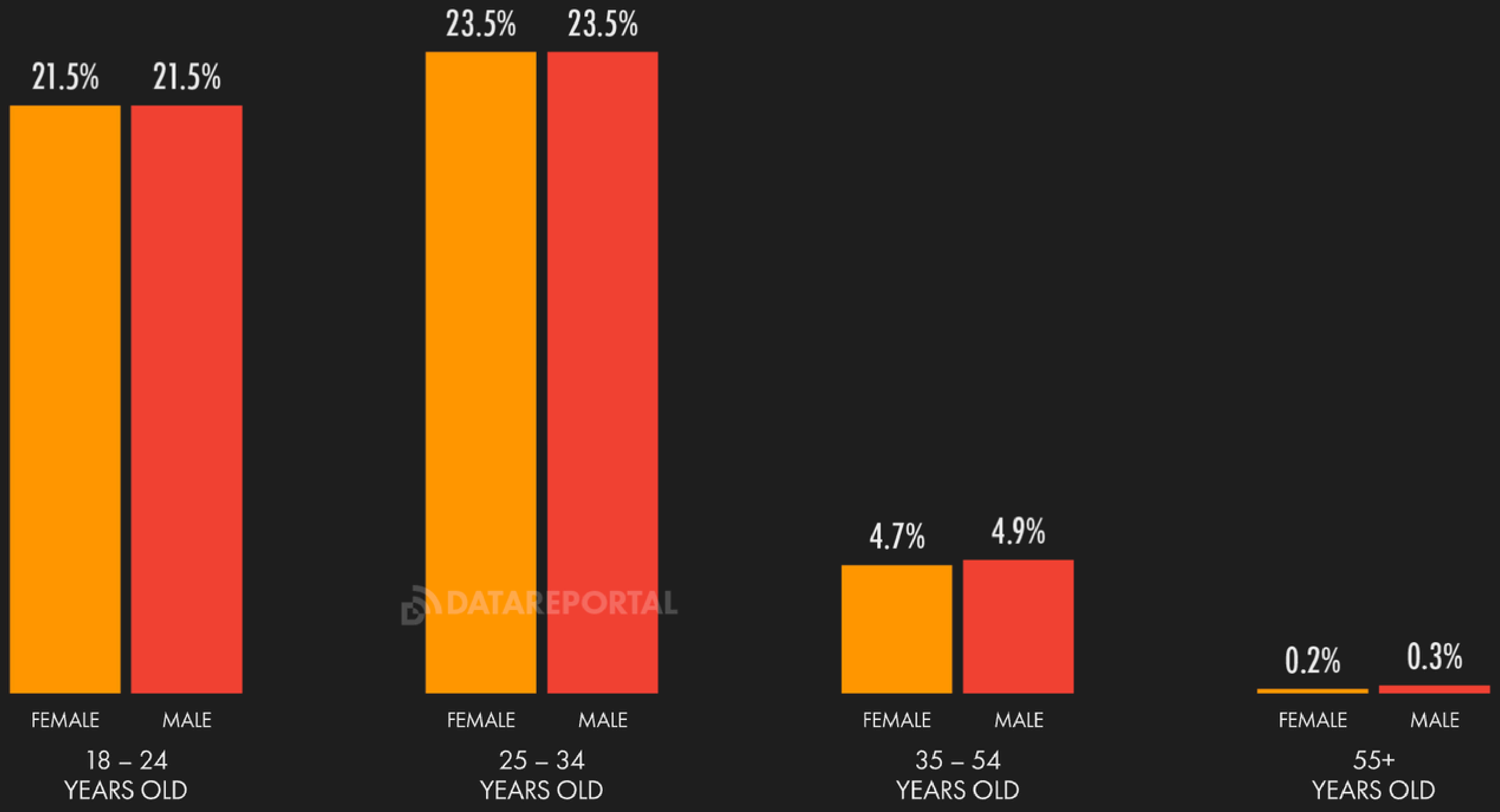

SOURCES: LINKEDIN'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE". **ADVISORY:** VALUES MAY NOT MATCH SHARE OF TOTAL ACTIVE USER BASE. USER AGE MISSTATEMENTS MAY DISTORT SOURCE DATA. **COMPARABILITY:** SOURCE DATA INCONSISTENCIES MAY MEAN THAT VALUES SHOWN HERE DO NOT CORRELATE WITH VALUES SHOWN ELSEWHERE IN THIS REPORT. BASE REVISIONS. SEE NOTES ON DATA.

MESSENGER

MESSENGER: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON MESSENGER

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM

TOTAL POTENTIAL REACH OF ADS ON MESSENGER	MESSENGER AD REACH vs. TOTAL POPULATION	MESSENGER AD REACH vs. TOTAL INTERNET USERS	QUARTER-ON-QUARTER CHANGE IN REPORTED MESSENGER AD REACH	YEAR-ON-YEAR CHANGE IN REPORTED MESSENGER AD REACH
55.9 MILLION	55.2%	70.0%	+1.9% +1.05 MILLION	+2.6% +1.40 MILLION

SHARE: FEMALE MESSENGER AD REACH AGED 18+ vs. OVERALL MESSENGER AD REACH AGED 18+	SHARE: MALE MESSENGER AD REACH AGED 18+ vs. OVERALL MESSENGER AD REACH AGED 18+	ADOPTION: OVERALL MESSENGER AD REACH AGED 18+ vs. OVERALL POPULATION AGED 18+	ADOPTION: FEMALE MESSENGER AD REACH AGED 18+ vs. FEMALE POPULATION AGED 18+	ADOPTION: MALE MESSENGER AD REACH AGED 18+ vs. MALE POPULATION AGED 18+
51.8%	48.2%	76.0%	75.2%	75.7%

SOURCES: META'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** LIMITED AVAILABILITY OF AD FORMATS MAY IMPACT REACH IN SOME COUNTRIES. VALUES BASED ON MIDPOINTS OF PUBLISHED RANGES. GENDER DATA ONLY AVAILABLE FOR "FEMALE" AND "MALE". FIGURES FOR ADOPTION BY GENDER MAY NOT CORRELATE WITH OVERALL ADOPTION. **ADVISORY:** REACH MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES COMPARING REACH WITH POPULATION AND INTERNET USERS MAY EXCEED 100% DUE TO USER AGE MISSTATEMENTS, DUPLICATE AND FAKE ACCOUNTS, DIFFERING RESEARCH DATES, AND CHANGES IN RESIDENT POPULATIONS. **COMPARABILITY:** BASE REVISIONS. VALUES FOR CHANGE OVER TIME MAY BE DISTORTED. SEE NOTES ON DATA.

FEB 2025

MESSENGER: REPORTED ADVERTISING REACH

TOTAL POTENTIAL AUDIENCE REACH OF ADS ON MESSENGER, AND CHANGE IN REPORTED REACH OVER TIME

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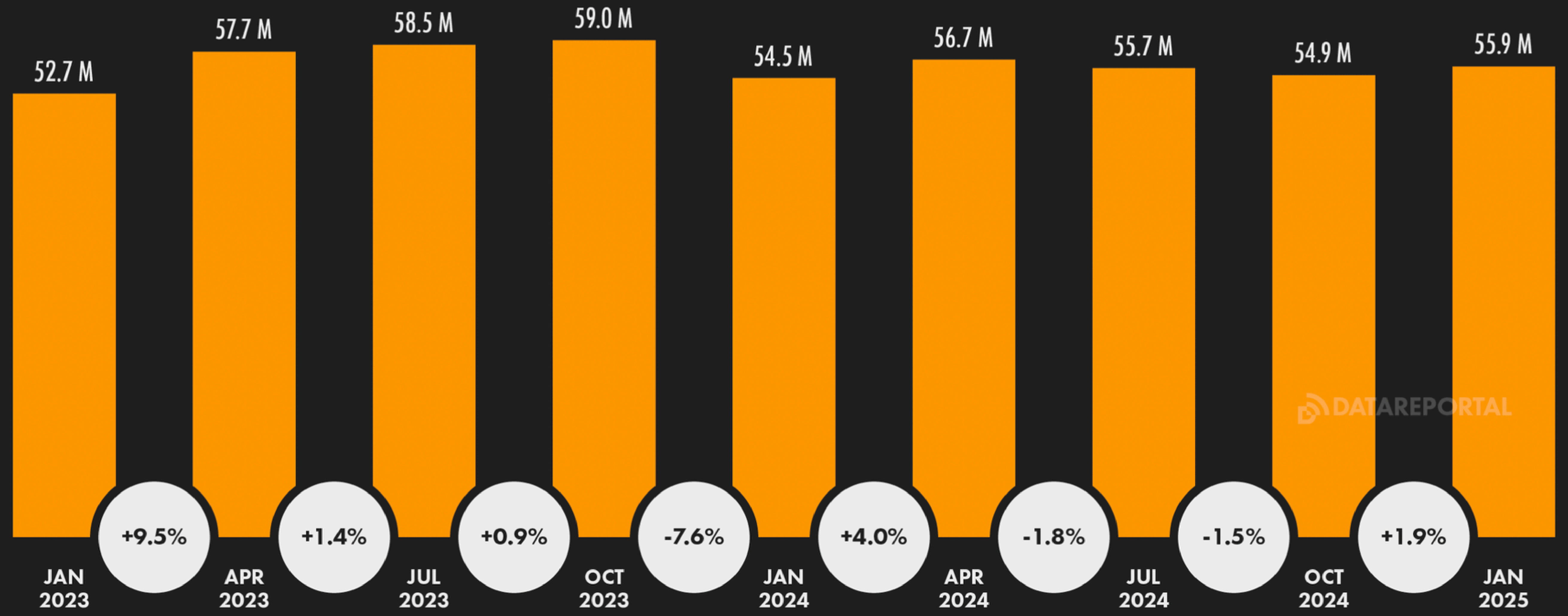
VIETNAM



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FEB 2025

MESSENGER: ADVERTISING AUDIENCE PROFILE

SHARE OF MESSENGER'S ADULT ADVERTISING AUDIENCE AGED 18+ BY AGE GROUP AND GENDER

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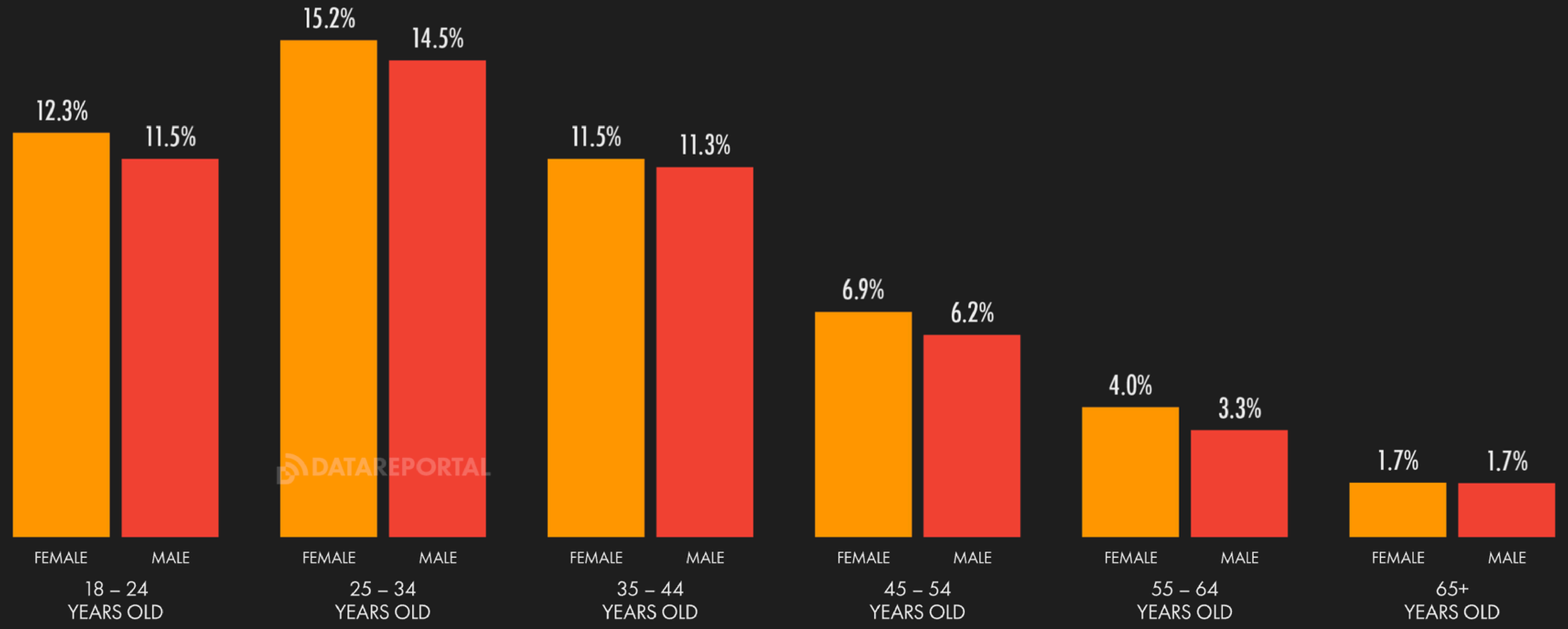

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X

X: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON X (TWITTER)

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM

TOTAL POTENTIAL REACH OF ADS ON X	X AD REACH vs. TOTAL POPULATION	X AD REACH vs. TOTAL INTERNET USERS	QUARTER-ON-QUARTER CHANGE IN REPORTED X AD REACH	YEAR-ON-YEAR CHANGE IN REPORTED X AD REACH
6.29 MILLION	6.2%	7.9%	-16.1% -1.20 MILLION	+12.6% +706 THOUSAND

SHARE: FEMALE X AD REACH AGED 18+ vs. OVERALL X AD REACH AGED 18+	SHARE: MALE X AD REACH AGED 18+ vs. OVERALL X AD REACH AGED 18+	ADOPTION: OVERALL X AD REACH AGED 18+ vs. OVERALL POPULATION AGED 18+	ADOPTION: FEMALE X AD REACH AGED 18+ vs. FEMALE POPULATION AGED 18+	ADOPTION: MALE X AD REACH AGED 18+ vs. MALE POPULATION AGED 18+
34.0%	66.0%	8.4%	5.5%	11.6%

SOURCES: X'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES USE MIDPOINTS OF PUBLISHED RANGES. GENDER DATA ONLY AVAILABLE FOR "FEMALE" AND "MALE". REACH BY GENDER MAY NOT CORRELATE WITH OVERALL ADOPTION. **ADVISORY:** FREQUENT ANOMALIES IN SOURCE DATA. REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES COMPARING REACH WITH POPULATION AND INTERNET USERS MAY EXCEED 100% DUE TO USER AGE MISSTATEMENTS, DUPLICATE AND FAKE ACCOUNTS, NON-INDIVIDUAL ACCOUNTS (E.G. BUSINESSES, MUSIC BANDS, ETC.), DIFFERING RESEARCH DATES, AND CHANGES IN RESIDENT POPULATIONS. **COMPARABILITY:** BASE REVISIONS. VALUES FOR CHANGE OVER TIME MAY BE DISTORTED. SEE NOTES ON DATA.

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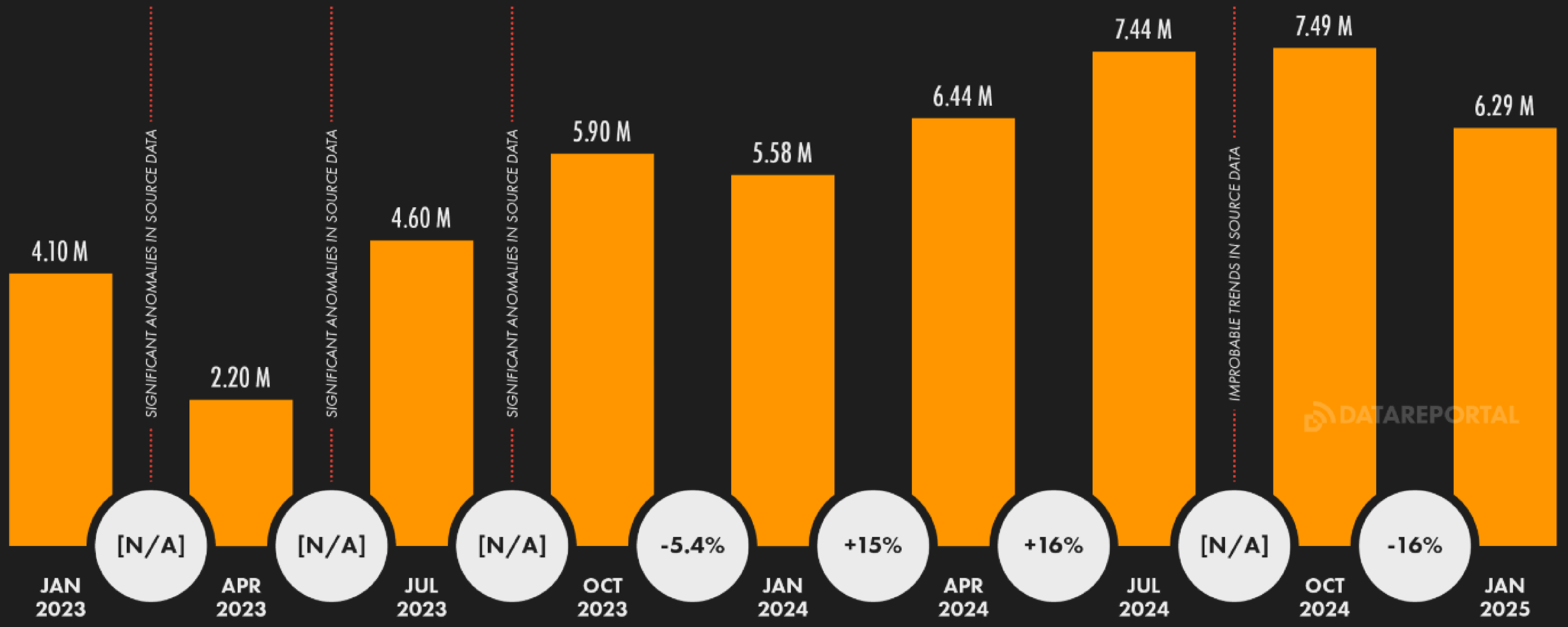
X: REPORTED ADVERTISING REACH

TOTAL POTENTIAL AUDIENCE REACH OF ADS ON X, AND CHANGE IN REPORTED REACH OVER TIME

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM



SOURCES: X'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES USE MIDPOINTS OF PUBLISHED RANGES. WHERE LETTERS ARE SHOWN NEXT TO BAR VALUES, "K" DENOTES THOUSANDS, "M" DENOTES MILLIONS, AND "B" DENOTES BILLIONS. WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. **ADVISORY:** SIGNIFICANT ANOMALIES IN SOURCE DATA. REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. **COMPARABILITY:** IN ADDITION TO CHANGES IN ACTIVE USER NUMBERS, SOURCE DATA REVISIONS AND CORRECTIONS AND CHANGES IN THE AVAILABILITY OF DATA BY LOCATION MAY RESULT IN MEANINGFUL CHANGES IN REPORTED REACH, WHICH MAY SIGNIFICANTLY DISTORT VALUES FOR CHANGE OVER TIME. SEE NOTES ON DATA.

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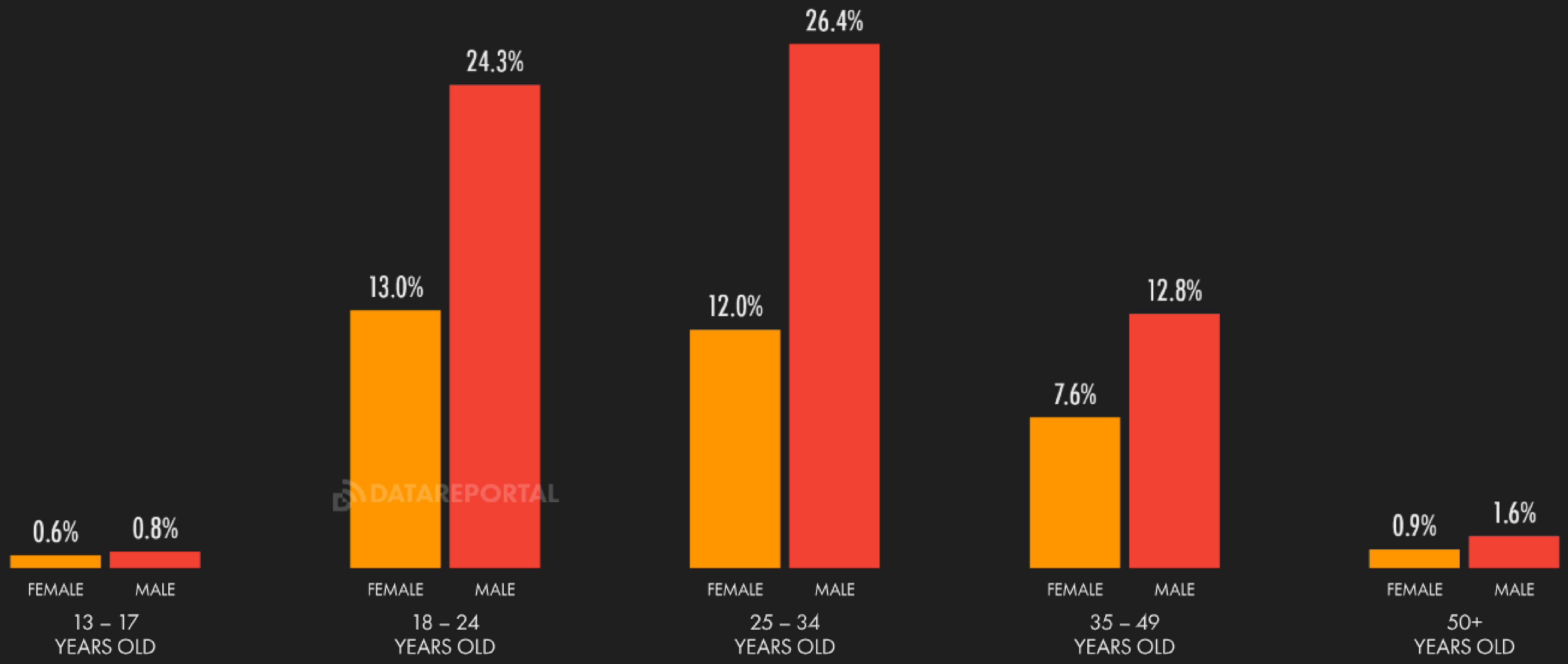
X: ADVERTISING AUDIENCE PROFILE

SHARE OF X'S ADVERTISING AUDIENCE BY AGE GROUP AND GENDER

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

VIETNAM



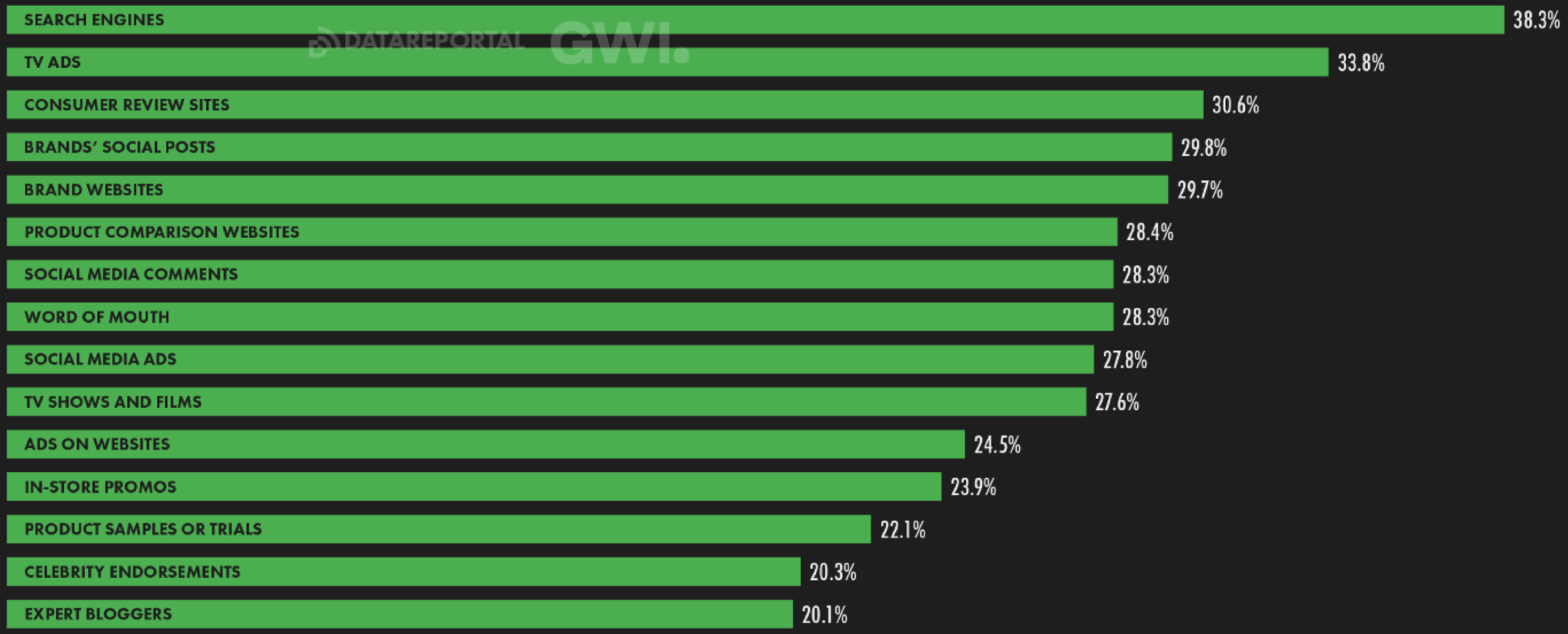
SOURCES: X'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES BASED ON MIDPOINTS OF PUBLISHED RANGES. GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE". VALUES MAY NOT SUM TO 100% DUE TO INCONSISTENCIES IN SOURCE DATA. **ADVISORY:** SIGNIFICANT ANOMALIES IN SOURCE DATA. VALUES MAY NOT MATCH SHARE OF TOTAL ACTIVE USER BASE. **COMPARABILITY:** SOURCE DATA INCONSISTENCIES MAY MEAN THAT VALUES SHOWN HERE DO NOT CORRELATE WITH VALUES SHOWN ELSEWHERE IN THIS REPORT. BASE REVISIONS. SEE NOTES ON DATA.

DIGITAL MARKETING

SOURCES OF BRAND DISCOVERY

PERCENTAGE OF INTERNET USERS AGED 16+ WHO DISCOVER NEW BRANDS, PRODUCTS, AND SERVICES VIA EACH CHANNEL OR MEDIUM

VIETNAM



SOURCE: GWI (Q3 2024). **COMPARABILITY:** CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

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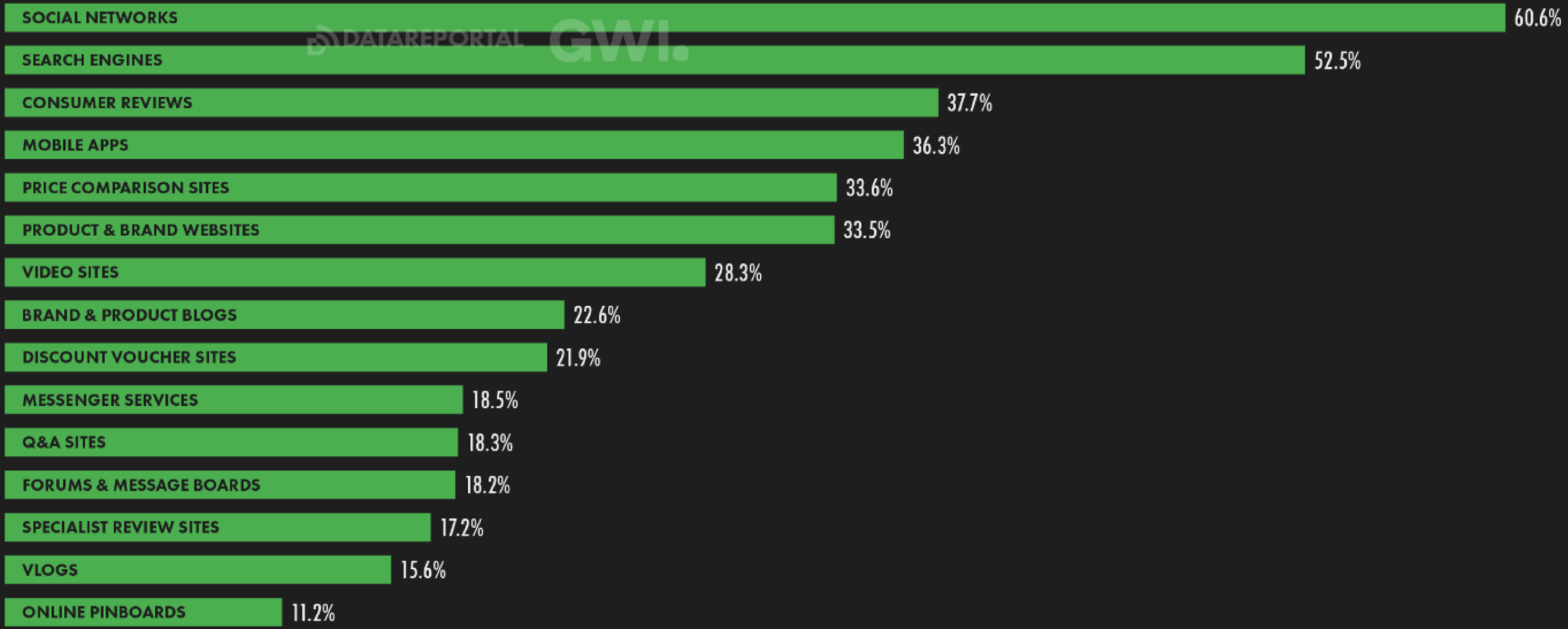
MAIN CHANNELS FOR ONLINE BRAND RESEARCH

PERCENTAGE OF INTERNET USERS AGED 16+ WHO USE EACH CHANNEL AS A PRIMARY SOURCE OF INFORMATION WHEN RESEARCHING BRANDS

VIETNAM



SOURCE: GWI (Q3 2024). COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

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ADVERTISING SPEND: TOTAL vs. DIGITAL

TOTAL AD SPEND ACROSS ALL CHANNELS, WITH DETAIL FOR DIGITAL AD SPEND (U.S. DOLLARS, FULL-YEAR 2024)

VIETNAM

TOTAL AD SPEND (INCLUDING ONLINE AND OFFLINE CHANNELS)	YEAR-ON-YEAR CHANGE IN TOTAL AD SPEND (ALL CHANNELS)	DIGITAL AD SPEND (INCLUDING SEARCH AND SOCIAL MEDIA)	YEAR-ON-YEAR CHANGE IN DIGITAL AD SPEND	DIGITAL AD SPEND AS A PERCENTAGE OF TOTAL AD SPEND
$2.76 BILLION	+6.4% +$167 MILLION	$1.43 BILLION	+11.3% +$145 MILLION	51.9%

SOURCE: STATISTA MARKET INSIGHTS. NOTES: FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2024, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). COMPARABILITY: BASE AND DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS. ADVISORY: THE DEFINITION OF "DIGITAL ADVERTISING" USED ON THIS CHART INCLUDES A BROADER VARIETY OF CHANNELS AND ACTIVITIES THAN THE DEFINITION USED ON SOME OTHER CHARTS IN THIS REPORT, SO VALUES MAY NOT CORRELATE ACROSS CHARTS.

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DIGITAL ADVERTISING SPEND

ANNUAL SPEND ON DIGITAL ADVERTISING BY FORMAT (U.S. DOLLARS, FULL-YEAR 2024)

VIETNAM

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** FIGURES REPRESENT ESTIMATES FOR FULL-YEAR SPEND IN 2024 IN U.S. DOLLARS. WHITE BARS DENOTED BY "(AGG.)" REPRESENT AGGREGATE VALUES, AND FIGURES INCLUDE COMBINED SUBSETS OF OTHER AD FORMATS ALSO SHOWN ON THIS CHART. FOR EXAMPLE, "SOCIAL MEDIA" SPEND INCLUDES A SUBSET OF REVENUES ALSO ASSOCIATED WITH ONLINE BANNER ADS AND ONLINE VIDEO ADS. WHERE LETTERS APPEAR NEXT TO FIGURES, "M" DENOTES MILLIONS, "B" DENOTES BILLIONS, AND "T" DENOTES TRILLIONS. **COMPARABILITY:** BASE CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

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DIGITAL MARKETING: ATTITUDES AND BEHAVIOURS

ATTITUDES AND BEHAVIOURS RELATING TO DIGITAL MARKETING AMONGST INTERNET USERS AGED 16+, INCLUDING AVERAGE AD SPEND PER CAPITA

VIETNAM

CONTEXT: AVERAGE DIGITAL AD SPEND PER INTERNET USER (USD; 2024)	FEEL REPRESENTED IN THE ADS THEY SEE AND HEAR	RESEARCH BRANDS ONLINE BEFORE MAKING A PURCHASE	VISIT SOCIAL MEDIA TO LEARN ABOUT BRANDS AND SEE BRANDS' CONTENT
$17.95	14.9%	52.8%	59.3%

VISITED A BRAND'S WEBSITE IN THE PAST MONTH	CLICKED OR TAPPED ON A BANNER AD ON A WEBSITE IN THE PAST MONTH	CLICKED OR TAPPED ON A SPONSORED SOCIAL MEDIA POST IN THE PAST MONTH	DOWNLOADED OR USED A BRANDED MOBILE APP IN THE PAST MONTH
42.7%	17.4%	23.7%	15.5%

SOURCE: AD SPEND DATA VIA STATISTA MARKET INSIGHTS; ALL OTHER VALUES VIA GWI (Q3 2024). NOTE: VALUES FOR AVERAGE DIGITAL AD SPEND ARE IN UNITED STATES DOLLARS, AND REPRESENT THE TOTAL SPEND ON DIGITAL ADS IN 2024 COMPARED WITH THE TOTAL NUMBER OF INTERNET USERS. COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

PROGRAMMATIC ADVERTISING OVERVIEW

SPEND ON PROGRAMMATIC ADVERTISING AND ITS SHARE OF THE DIGITAL ADVERTISING MARKET

VIETNAM

ANNUAL SPEND ON PROGRAMMATIC ADVERTISING (USD)	YEAR-ON-YEAR CHANGE IN PROGRAMMATIC ADVERTISING SPEND (USD)	PROGRAMMATIC'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND	YEAR-ON-YEAR CHANGE IN PROGRAMMATIC'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND
$1.13 BILLION	+13.7% +$136 MILLION	78.8%	+2.2% +166 BPS

SOURCE: STATISTA MARKET INSIGHTS. NOTES: FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2024, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. COMPARABILITY: BASE CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

IN-APP ADVERTISING OVERVIEW

SPEND ON ADVERTISING WITHIN MOBILE AND TABLET APPS, AND THE ASSOCIATED SHARE OF THE DIGITAL ADVERTISING MARKET

VIETNAM

ANNUAL SPEND ON IN-APP ADVERTISING (USD)	YEAR-ON-YEAR CHANGE IN IN-APP ADVERTISING SPEND (USD)	IN-APP ADVERTISING'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND	YEAR-ON-YEAR CHANGE IN IN-APP ADVERTISING'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND
$450 MILLION	+12.4% +$49.7 MILLION	31.4%	+1.0% +32 BPS

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2024, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. **COMPARABILITY:** BASE CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

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SEARCH ADVERTISING OVERVIEW

SPEND ON ONLINE SEARCH ADVERTISING (IN U.S. DOLLARS) AND ITS SHARE OF THE DIGITAL ADVERTISING MARKET

VIETNAM

ANNUAL SPEND ON ONLINE SEARCH ADVERTISING (USD)	YEAR-ON-YEAR CHANGE IN ONLINE SEARCH ADVERTISING SPEND	ONLINE SEARCH'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND	YEAR-ON-YEAR CHANGE IN ONLINE SEARCH'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND
$572 MILLION	**+15.2%** +$75.3 MILLION	**39.9%**	**+3.5%** +134 BPS

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SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2024, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. **COMPARABILITY:** BASE CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

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SOCIAL MEDIA ADVERTISING OVERVIEW

SPEND ON SOCIAL MEDIA ADVERTISING (IN U.S. DOLLARS) AND ITS SHARE OF THE DIGITAL ADVERTISING MARKET

VIETNAM

ANNUAL SPEND ON SOCIAL MEDIA ADVERTISING (USD)	YEAR-ON-YEAR CHANGE IN SOCIAL MEDIA ADVERTISING SPEND	SOCIAL MEDIA'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND	YEAR-ON-YEAR CHANGE IN SOCIAL MEDIA'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND
$398 MILLION	+12.0% +$42.7 MILLION	27.8%	+0.6% +18 BPS

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2024, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. **COMPARABILITY:** BASE CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

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INFLUENCER ADVERTISING OVERVIEW

SPEND ON INFLUENCER ADVERTISING ACTIVITIES (IN U.S. DOLLARS) AND THEIR SHARE OF THE DIGITAL ADVERTISING MARKET

VIETNAM

ANNUAL SPEND ON INFLUENCER ADVERTISING (USD)	YEAR-ON-YEAR CHANGE IN INFLUENCER ADVERTISING SPEND	INFLUENCER ADVERTISING'S SHARE OF TOTAL DIGITAL AD SPEND	YEAR-ON-YEAR CHANGE IN INFLUENCER ADVERTISING'S SHARE OF TOTAL DIGITAL AD SPEND
$87.0 MILLION	+15.6% +$11.7 MILLION	6.1%	+3.9% +23 BPS

SOURCE: STATISTA MARKET INSIGHTS. **NOTES:** FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2024, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. FIGURES REPRESENT THE MONETARY VALUE PAID DIRECTLY TO INFLUENCERS OR THEIR AGENTS, AND DO NOT INCLUDE THE VALUE OF PRODUCT GIVEAWAYS, MEDIA SPEND TO "BOOST" POSTS, OR AFFILIATE COMMISSIONS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. **COMPARABILITY:** BASE CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

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ONLINE PRIVACY AND SECURITY

PERSPECTIVES AND ACTIVITIES OF ONLINE ADULTS RELATING TO THEIR ONLINE DATA PRIVACY AND SECURITY

VIETNAM

WORRY ABOUT HOW COMPANIES MIGHT USE THEIR ONLINE DATA	DECLINE COOKIES ON WEBSITES AT LEAST SOME OF THE TIME	USE A TOOL TO BLOCK ADVERTISEMENTS ON THE INTERNET AT LEAST SOME OF THE TIME	USE A VIRTUAL PRIVATE NETWORK (VPN) TO ACCESS THE INTERNET AT LEAST SOME OF THE TIME
25.5%	28.4%	36.0%	29.1%

SOURCE: GWI (Q3 2024). COMPARABILITY: CHANGES IN AUDIENCE COMPOSITION AND SURVEY METHODOLOGY. SEE NOTES ON DATA.

MORE INFORMATION

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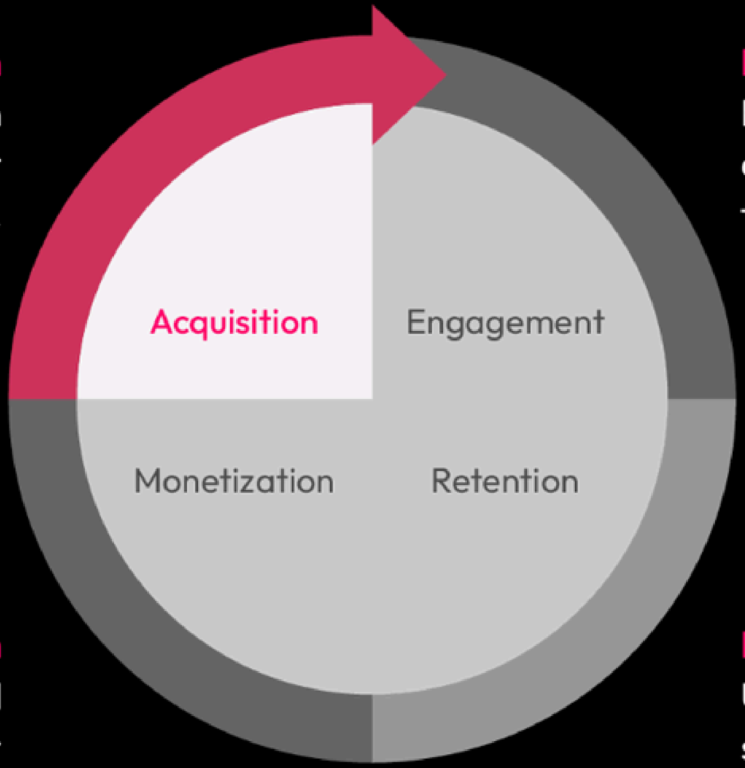

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NOTES ON DATA VARIANCE, MISMATCHES, AND CURIOSITIES

Note: *This page is a summary of our comprehensive notes on data variance, potential mismatches, and curiosities, which you can read in full at* https://datareportal.com/notes-on-data.

This report features data from a wide variety of different sources, including market research agencies, internet and social media companies, governments, public bodies, news media, and private individuals, as well as extrapolations and analysis of that data.

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

Please note that some data points may only be available for a limited selection of countries, so we may not be able to report the same data in all reports.

From time to time, we may also change the source(s) that we use to inform specific data points. As a result, some figures may appear to change in unexpected ways from one report to another. Wherever we're aware of these changes, we include details in the footnotes of each relevant chart, but please use caution when comparing data from different reports, because changes to research samples, base data, research methodologies, and approaches to reporting may mean that values are not comparable.

Furthermore, due to the differing data collection and treatment methodologies, and the different periods during which data have been collected, there may be significant differences in the reported metrics for similar data points throughout this report. For example, data from surveys often varies over time, even if that data has been collected by the same organisation using the same approach in each wave of their research.

In particular, reports of internet user numbers vary considerably between different sources and over time. In part, this is because there are significant challenges associated with collecting, analysing, and publishing internet user data on a regular basis, not least because research into public internet use necessitates the use of face-to-face surveys. Different organisations may also adopt different approaches to sampling the population for research into internet use, and variations in areas such as the age range of the survey population, or the balance between urban and rural respondents, may play an important role in determining eventual findings. Note that COVID-19 has limited internet user research.

Prior to our Digital 2021 reports, we included data sourced from social media platforms' self-service advertising tools in our calculations of internet user numbers, but we no longer include this data in our internet user figures. This is because the user numbers reported by social media platforms are typically based on active user accounts, and may not represent unique individuals. For example, one person may maintain more than one active presence (account) on the same social media platform. Similarly, some accounts may represent 'non-human' entities, including: pets and animals; historical figures; businesses, causes, groups, and organisations; places of interest; etc.

As a result, the figures we report for social media users may exceed internet user numbers. However, while this may seem counter-intuitive or surprising, such instances do not represent errors in the data or in our reporting. Rather, these differences may indicate delays in the reporting of internet user numbers, or they may indicate higher instances of individuals managing multiple social media accounts, or 'non-human' social media accounts.

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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