

Rising smartphone usage paves way for ecommerce opportunities in Southeast Asia

Article

The trend: Smartphone usage spiked during the pandemic, and it's a habit that has endured worldwide. The number of smartphone users in Southeast Asia will reach **326.3 million** in

2022 and rise steadily through 2026, per our forecast.

- The accessibility of smartphone technology has helped facilitate mobile internet consumption. Nearly nine in 10 internet users in Southeast Asia will use smartphones this year.
- Smartphone penetration among internet users in the region will range from a high of 98.8% in Thailand to a low of 81.7% in the Philippines in 2022.
- This year, the number of Southeast Asia smartphone users will grow faster than the number of overall mobile phone users.

Smartphone Users in Southeast Asia, by Country, 2021-2026

millions, % change, and % of internet users

	2021	2022	2023	2024	2025	2026
Indonesia	121.0	125.1	129.2	133.4	137.5	141.3
—% change	6.2%	3.4%	3.3%	3.3%	3.0%	2.8%
—% of internet users	83.6%	83.2%	83.5%	84.0%	85.3%	86.5%
Vietnam	60.6	62.8	63.8	65.0	66.3	67.3
—% change	8.6%	3.6%	1.6%	1.9%	1.9%	1.7%
—% of internet users	94.7%	96.0%	96.1%	96.4%	96.7%	96.9%
Philippines	53.4	56.4	58.9	61.1	62.8	64.1
—% change	6.8%	5.6%	4.5%	3.8%	2.7%	2.1%
—% of internet users	79.6%	81.7%	83.6%	85.2%	86.0%	86.4%
Thailand	51.4	53.1	54.1	54.7	55.3	55.8
—% change	8.3%	3.2%	1.9%	1.2%	1.0%	0.9%
—% of internet users	98.8%	98.8%	97.6%	97.8%	97.8%	97.9%
Malaysia	23.7	24.3	24.7	25.2	25.6	25.8
—% change	2.8%	2.3%	1.9%	1.7%	1.5%	1.1%
—% of internet users	89.1%	89.3%	89.1%	89.0%	88.7%	88.1%
Singapore	4.6	4.7	4.8	4.9	4.9	5.0
—% change	2.1%	1.6%	1.5%	1.5%	1.2%	1.1%
—% of internet users	92.4%	92.4%	92.5%	92.7%	92.8%	92.8%
Southeast Asia	314.8	326.3	335.6	344.4	352.3	359.4
—% change	6.8%	3.7%	2.8%	2.6%	2.3%	2.0%
—% of internet users	87.5%	88.0%	88.3%	88.9%	89.6%	90.1%

Note: individuals of any age who own at least one smartphone and use the smartphone(s) at least once per month; numbers may not add up to total due to rounding
Source: Insider Intelligence, March 2022

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Poised for growth: Since the pandemic, Southeast Asia consumers have used smartphones for a range of purposes, including gaming, food delivery, and mobile payments. These market sectors stand to gain as internet usage expands.

- Consulting firm Frost & Sullivan estimates the food delivery gross merchandise value in Southeast Asia will rise to \$49.72 billion in 2030 from \$15.15 billion in 2021.

- Mobile and desktop/laptop gaming revenues in the region will reach \$6.7 billion in 2025, growing at a 7.8% CAGR between 2021 and 2025.

The big takeaway: As Southeast Asia moves toward a more digital-oriented way of life, brands can gain and retain buyers and users by leveraging local knowledge and avoiding blanket solutions that might not work for individual markets.

Go further: For more on our forecast for internet, smartphone, and tablet users in Southeast Asia, read our [report](#).