

TELENOR ASIA DIGITAL LIVES DECODED

Part One: Live



**Decoding changing attitudes
towards mobile connectivity in
South and Southeast Asia**

September 2022





We have seen the next wave of mass digital engagement and growth accelerate in markets throughout South and Southeast Asia

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Foreword

In the past 25 years, mobile connectivity has exploded in Asia, creating new industries, reshaping media, and transforming how we connect with each other. That growth story is often told through the prism of the region's largest economies: China, India, Japan, and South Korea. Since the outbreak of COVID-19, we have seen the next wave of mass digital engagement and growth accelerate in markets throughout South and Southeast Asia.

To take stock of fast-changing digital lifestyles in the region, Telenor conducted a survey of over 8,000 people using mobile devices and internet across **Bangladesh, Indonesia, Malaysia, Pakistan, the Philippines, Singapore, Thailand, and Vietnam.**

The survey highlighted that they share a common appreciation for the benefits of an "always-on" life. Cutting across different markets and age groups, most respondents are united by a firm belief that connectivity empowers them with more economic opportunity, convenience, and entertainment options. At an interpersonal level, mobile devices enrich relationships and enable them to stay connected, even as the aftershocks of the pandemic continue to disrupt how people interact with one another in various settings across their daily lives.

However, our study also reveals gaps in digital transformation in these markets. Older and rural users find fewer benefits to mobile access than their young, urban counterparts. Skill gaps, privacy and security have become serious concerns in every market we surveyed, with those living in cities more likely to say privacy and security is a strong consideration in how they use mobile devices and apps than those residing in rural areas.

As mobile connectivity evolves from a nice-to-have to a must-have, the need to understand these gaps is becoming more important to policymakers, businesses, and individuals alike. Lacking the right skills, awareness, devices, or being off the grid can severely restrict access to education, healthcare, and employment. In tandem, bringing more people online and accelerating digital adoption requires greater energy consumption so there is a need to better understand the carbon footprint of our online habits. Insights from this survey can thus act as a map of where to bridge the widest digital divides.

We believe we have reached a digital inflection point for Asia. This year Telenor celebrates a quarter of a century of operations in Asia. As we look forward, we wish that future to be one where mobile connectivity is empowering and sustainable for all. We hope you too will find that our "Digital Life Decoded" study brings deep insights into building that future together.



Jørgen C. Arentz Rostrup
Head of Telenor Asia



Research methodology

Telenor Asia's "Digital Lives Decoded" study is a three-part series looking at the role of mobile connectivity in how we live, work, and play. The first report examines the impact mobile usage is having on the way people live, with a focus on quality of life, relationships, access and inclusion, and outlook for the future.

This report summarises findings from a survey undertaken in July 2022 of 8,227 mobile internet users spread across eight markets in South and Southeast Asia, including Bangladesh, Indonesia, Malaysia, Pakistan, the Philippines, Singapore, Thailand, and Vietnam. Respondents were evenly split by gender, ranging in age from 18 years and older, and crossing four generations: Gen Z (Born 1997 – 2012); Millennials (Born 1981 – 1996); Gen X (Born 1965 – 1980) and Baby Boomers (Born 1946 – 1964). Survey respondents were granted anonymity and Telenor's involvement was not disclosed.



○ Where Telenor has operations



Chapter One: Swiping up for an always-on lifestyle

Enhancing relationships in a post-pandemic world

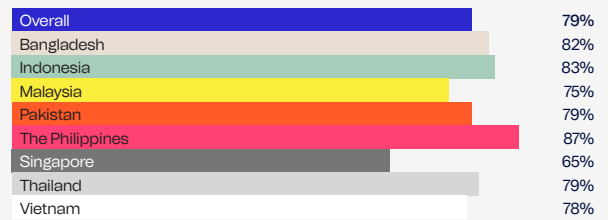
It's often reported that mobile usage is coming between people, distracting users from those around them and damaging relationships and interpersonal communication skills. However, our study dispels this notion and suggests that mobile connectivity is actually improving our relationships.

Out of a wide range of relationships the survey looked at, 78% across all markets feel that friendships are improved, while 75% say mobile devices help make family relationships better, with this trend highest for family groups in the Philippines (86%).

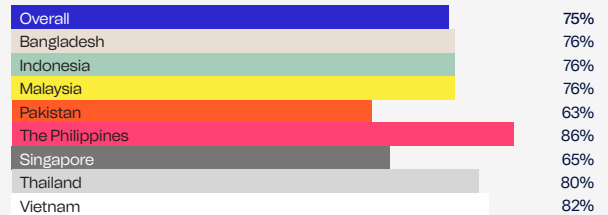
The numbers are similar for co-workers (74%) but starts to drop off slightly for relationships with partners (63%) and children (62%), with respondents in Pakistan and Singapore the least likely to say that mobile devices had improved the relationships with their children (51%).

Improving relationships

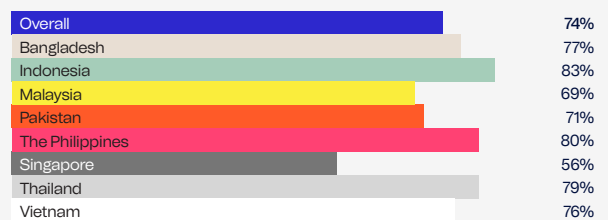
With friends



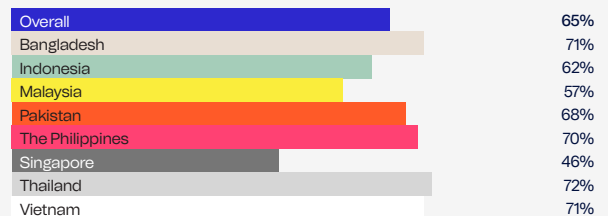
With family members



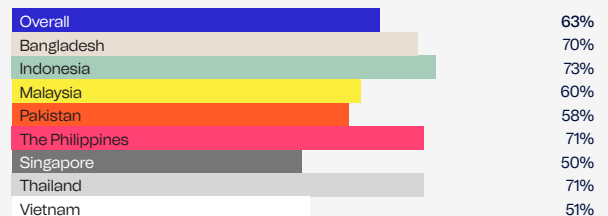
With co-workers



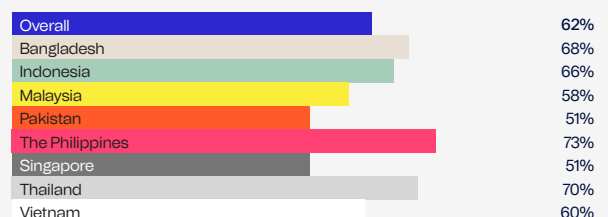
With service providers



With partners



With children



Improving quality of life

Building stronger relationships, being better informed, more productive and efficient – these are just some of the ways people believe mobile usage is making a positive impact on their daily lives.

Of those interviewed, 93% believe their mobile usage improves quality of life. Across the markets, respondents from Southeast Asia noted improvement to quality of life, more than those in South Asia with Vietnam at 98% and Indonesia at 97%. The South Asian markets surveyed are less convinced, with Bangladesh at 91% and Pakistan at 88%, the lowest.

Enriching lives

Mobile phone improves quality of life

Overall	58%	35%	93%
Bangladesh	53%	38%	91%
Indonesia	66%	31%	97%
Malaysia	51%	43%	94%
Pakistan	47%	41%	88%
The Philippines	61%	32%	93%
Singapore	51%	41%	92%
Thailand	69%	23%	92%
Vietnam	65%	33%	98%

■ Significantly improves
 ■ Improves

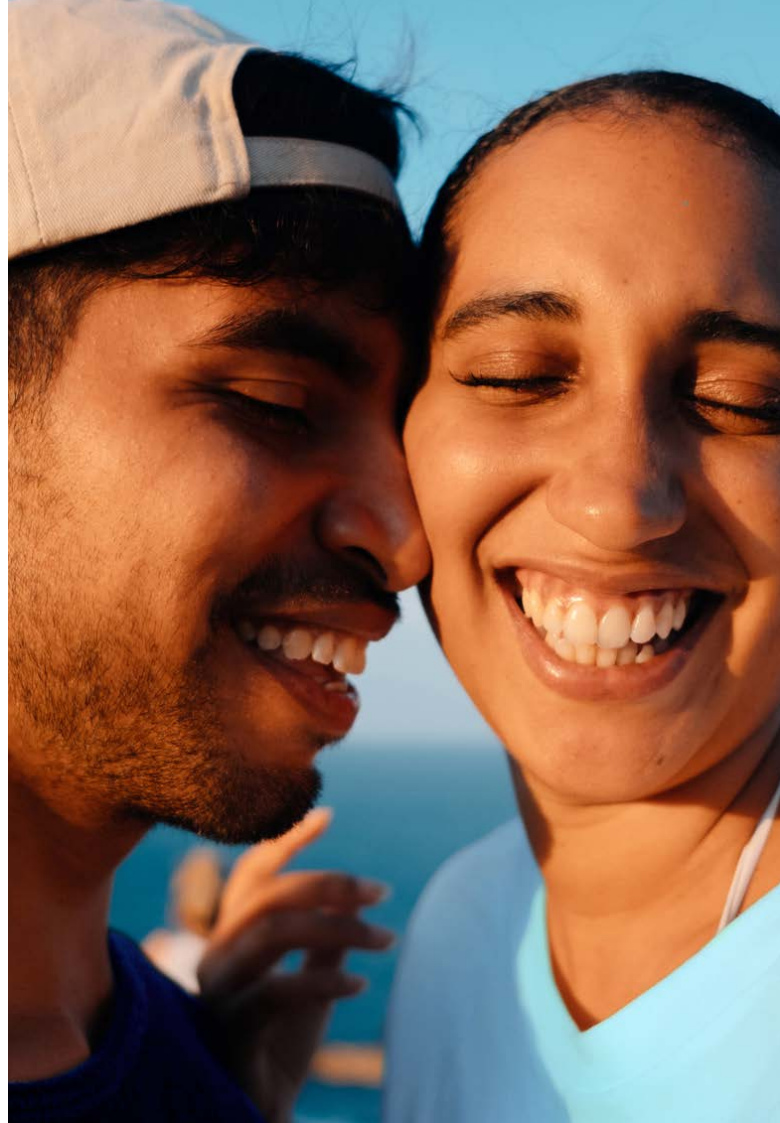
93% believe their mobile usage improves quality of life







What’s driving this sense of improvement?

More than four in five (82%) believe their mobile usage connects them more firmly to friends and family, with a similar number (81%) believing mobile devices simplify the process of communication, which ultimately saves them at least an hour a day.

Millennials, Gen X and Baby Boomers are also much more likely than other groups to say their mobile usage improves their relationships with family members and children. Nearly eight in 10 say it improves or significantly improves their family relationships. In comparison, just one in three Gen Z respondents feels that mobile usage helps them connect more effectively with family.



Mobile phone improves relationships

		With friends	With family members	With co-workers	With service providers	With partner or spouse	With children
	Gen Z	80%	69%	73%	67%	55%	49%
	Millennial	79%	76%	75%	67%	66%	64%
	Gen X	78%	76%	74%	62%	66%	65%
	Baby Boomer	77%	82%	68%	57%	64%	72%



Respondents also cite access to information to help with their daily lives (67%) and increased efficiency and productivity (65%) as key factors for better quality of life.

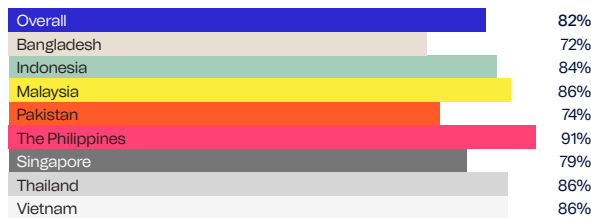
Aspects of mobile usage having the greatest impact on improving quality of life all relate to online connectivity. They include access to calls or emails (84%), use of search engines (83%), and use for work and as an e-learning tool (both at 82%). On the contrary, the three activities cited to reduce or significantly reduce quality of life are: looking at

content before sleep (15%), playing video games (14%) and using dating apps (11%).

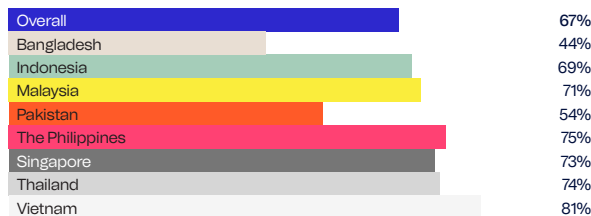
The connectivity theme also underlines the most useful mobile applications (or apps). Software and apps that connect users to work, education, and banking services are rated as the most popular by our respondents, with over half rating them as 'very useful' at 56%, 55% and 54% respectively. Overall, Singaporeans are by far the least likely to find these apps 'very useful', with only around one third saying this for banking apps (38%), work apps (31%), and education apps (30%).

Reasons for better quality of life

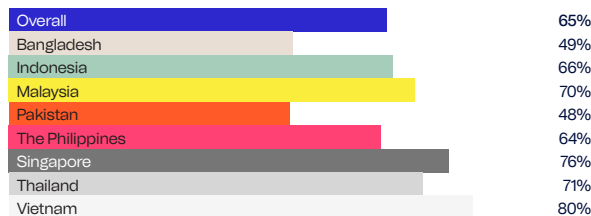
Greater connectivity to friends and family



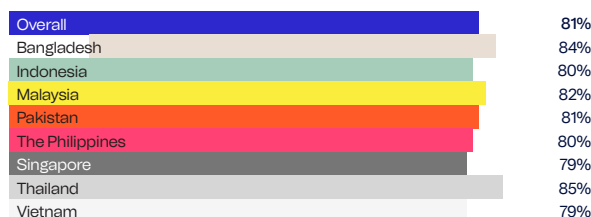
Access to information for daily tasks



Increased efficiency and productivity

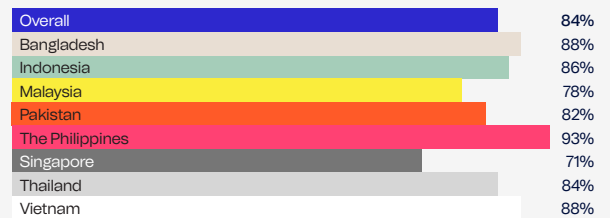


Communication with friends and family / save at least 1 hour a day

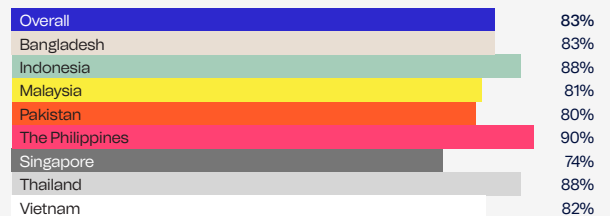


Activities that improve quality of life

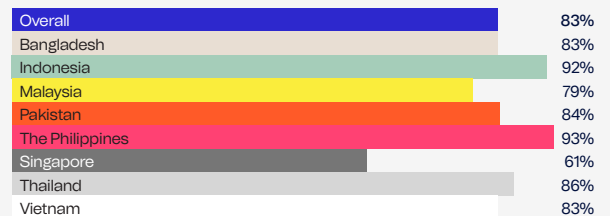
Communicating via calls or emails



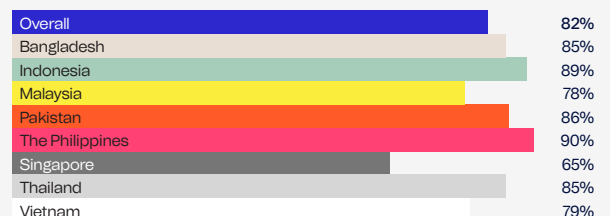
Using search engines



Using for work



Using for e-learning



Activities that reduce quality of life



Looking at content before sleep

15%



Playing video games

14%



Using dating apps

11%

“The findings from this survey corroborate what we also see from studies in other parts of the world. For people living under the same roof, the mobile phone is used extensively to coordinate tasks and activities in day-to-day life. For family and friends who don’t meet every day, the phone has a more important role in developing and maintaining the social bond – for instance, by sharing casual snapshots or getting emotional support through challenging times. This became more evident than ever during the pandemic and showed how mobile phones, in particular smartphones, can bring people together despite physical barriers and social distancing. Experiencing this during lockdowns has probably made people more open to testing out new communication services and functionalities in the years ahead.”

Dr. Wenche Nag

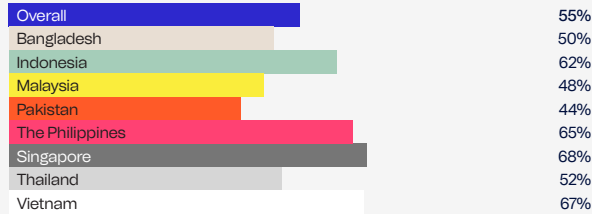
Senior Research Scientist, Telenor Research



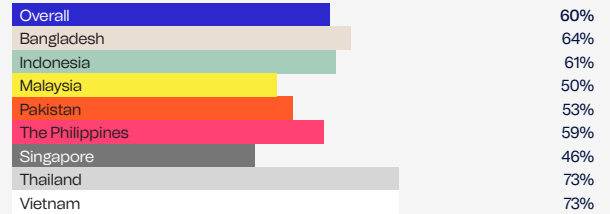
Gaps exist in generational views

Mobile phone significantly improves quality of life

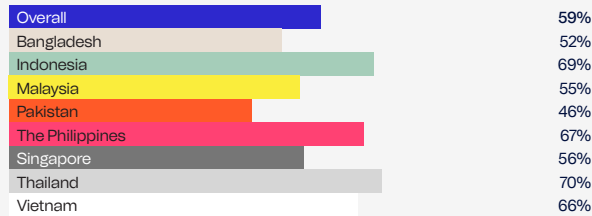
Gen Z



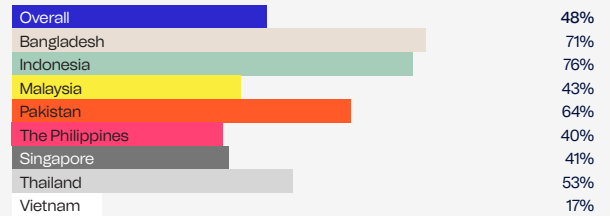
Gen X



Millennial



Baby Boomer



Nonetheless, there exist some significant differences between different demographics across the regions.

Across all age groups, Baby Boomers are least likely to say their mobile usage significantly improves quality of life, with half of people in this group (48%) feeling this way. Large differences can be seen by market, with only 17% of Baby Boomers in Vietnam saying mobile usage 'significantly' improves their quality of life, compared with 71% of the same age group in Bangladesh.

Baby Boomers are also the largest group who indicate that mobile devices significantly reduce their quality of life, with this sentiment particularly noticeable in the Philippines, where more than a quarter of the oldest age group (26%) feel this way. As a result, this age group also tend to use their phones less, with only 41% spending five or more hours a day, compared to 56% across all age groups.

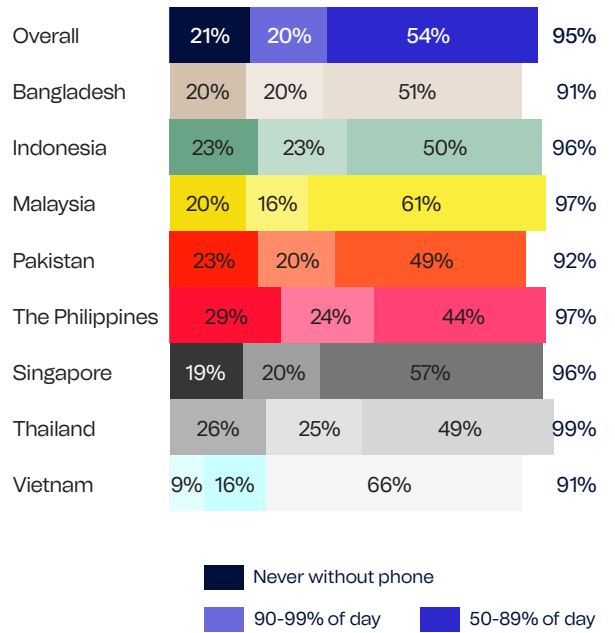


Surge in digital adoption shows no sign of slowing down

In spite of differences across generations, mobile usage shows no sign of abating across South and Southeast Asia.

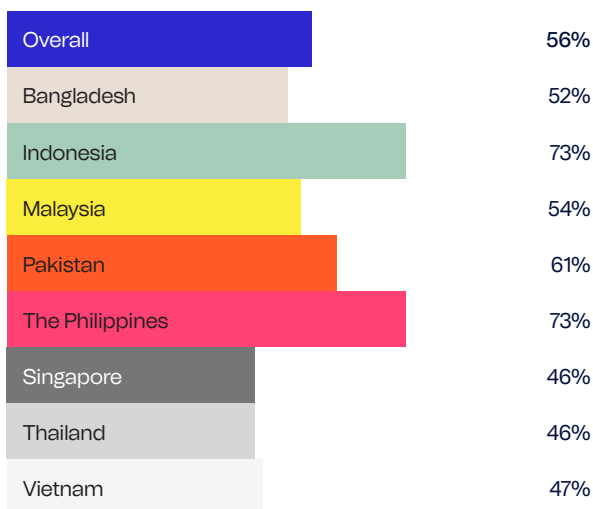
Nearly all surveyed (95%) have their mobile phone with them for at least half of their day, while over two in five (41%) have it for 90% of their day and more than one in five (21%) are never without their phone.

Majority have mobile devices with them for large parts of the day



Time engaging with mobile phone

At least 5 hours a day



Digital dependence is strongest in the Philippines and Thailand, with 29% and 25% respectively never without their mobile phones, while Vietnam is an outlier with fewer than one in 10 (9%) never without it. Yet, showing the great digital potential of this market, over four in five (81%) Vietnamese people believe their usage will increase further in the next 24 months.

Having mobile devices with them for a large part of the day also sees a knock-on effect on the time spent using them. Over half of the respondents (56%) say they spend at least five hours a day using their phones.

When looking at the markets, the highest usage is seen in Indonesia and the Philippines, with nearly three quarters (73%) of respondents spending at least five hours a day engaging with their mobile devices, compared with much lower rates at this usage level in Thailand (46%), Singapore (46%), and Vietnam (47%).



The growing need for connectivity and jump in usage during the pandemic has been widely discussed. Our findings show that more than a third of people (35%) say their usage has increased 'significantly' since the turn of the year, a rate greater than at any point over the past five years. Bangladesh has seen one of the sharpest digital acceleration in 2022 alone (41%), alongside the Philippines and Thailand, both at 40%.

In large part, the increased usage is being driven by social interaction, with 49% of respondents indicating this as the top reason for the increase, followed by work (28%), demonstrating the increasingly blurry line between personal and work time as a result of the pandemic.

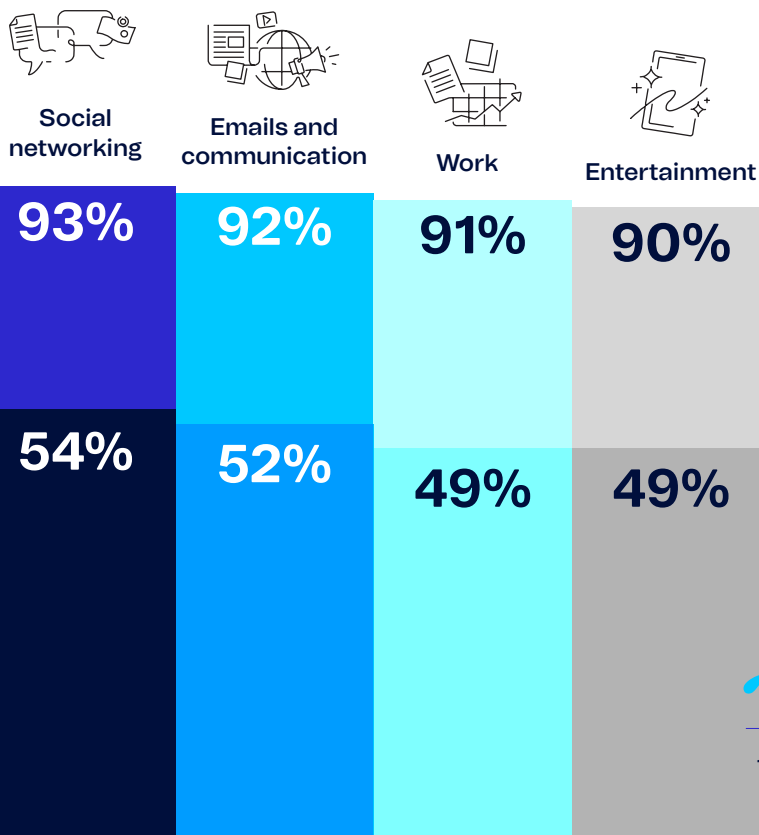
This can be seen in the daily and weekly usage numbers of different types of applications:

At a market level, respondents in the Philippines are the highest users of social media, with 70% using their devices for social networking daily, followed by 62% in Bangladesh and Indonesia, and 58% in Pakistan. Respondents in these same four markets are also more likely to use their mobile devices for email communications, work, and entertainment on a daily basis – suggesting the important role that mobile access is playing in connectivity and inclusion in these markets.

Usage of different mobile applications

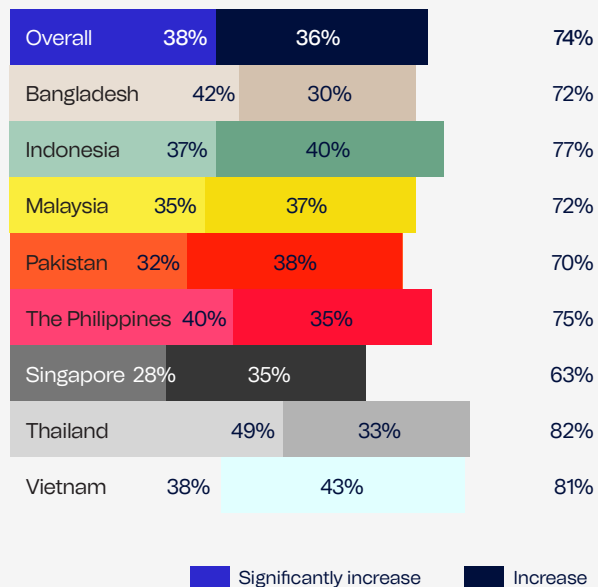
Daily / Weekly

■ Daily ■ Weekly



High usage rates are expected to continue into the future, with nearly three quarters (74%) of respondents expecting to see the time they spend on their phone rising in the next 12 to 24 months. This is most prevalent among respondents in Thailand (82%) and Vietnam (81%). Of these, nearly half (49%) of the respondents in Thailand are set to significantly increase their usage.

Increasing mobile phone usage in next 1-2 years



Drivers of increased mobile usage in next six to 12 months

Over four in five (82%) respondents expect work to be a key driver of their increased usage in the next year, with this trend being less prevalent in Singapore than other markets (29%). In addition to work, entertainment, social interaction and everyday online services are set to propel this growth.



Usage for work

82%



Usage for entertainment

73%



Usage for everyday online services

73%



Usage for social interaction

71%



Usage for physical fitness and wellness

59%

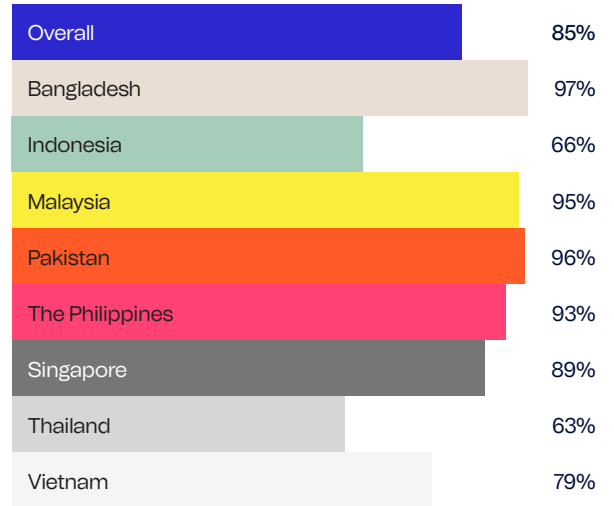


Many are concerned about keeping pace with rapidly changing technology

In spite of the current time spent on mobile devices, respondents are still concerned about their digital skills and whether they are sufficient to get the most out of technology in the coming years. 85% of people are concerned about keeping pace with rapidly changing technology, although almost everyone surveyed (98%) feel their skills are sufficient to get them by for now.

Interestingly, the younger respondents – Gen Zs (55%) and Millennials (50%) – are most concerned about having the right skills to keep pace with technology. Such concerns also differ greatly by market. More than nine in 10 respondents in Bangladesh, Malaysia, Pakistan and the Philippines are concerned about this, compared with fewer than seven in 10 in Indonesia and Thailand.

Concerned about keeping pace with technology



“Very concerned” about keeping pace



Gen Z

55%



Millennial

50%



Gen X

41%



Baby Boomer

41%



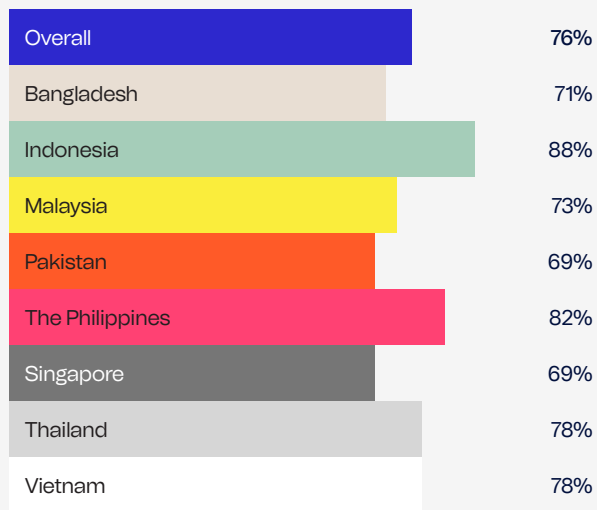
Striking a healthy balance

Despite the prevalent use of mobile devices for a wide range of tasks, most people feel they have found a balance with technology, with more than three-quarters (76%) believing they do not overuse their mobile devices.

When looking across the markets studied, those in Pakistan (69%) and Singapore (69%) were the least likely to say they had a good balance with the use of technology in their daily life.

Gen Zs are also most likely to feel they are overusing technology. 26% of Gen Zs feel this way compared to just 12% of Baby Boomers, suggesting that the latter group who did not grow up with mobile devices are better able to manage how they use them, compared to those who have lived with them all their lives.

Good balance of technology use



Relationship with mobile technology in personal life



Gen Z

Good balance

70%

Overusing

26%



Millennial

Good balance

76%

Overusing

20%



Gen X

Good balance

79%

Overusing

15%



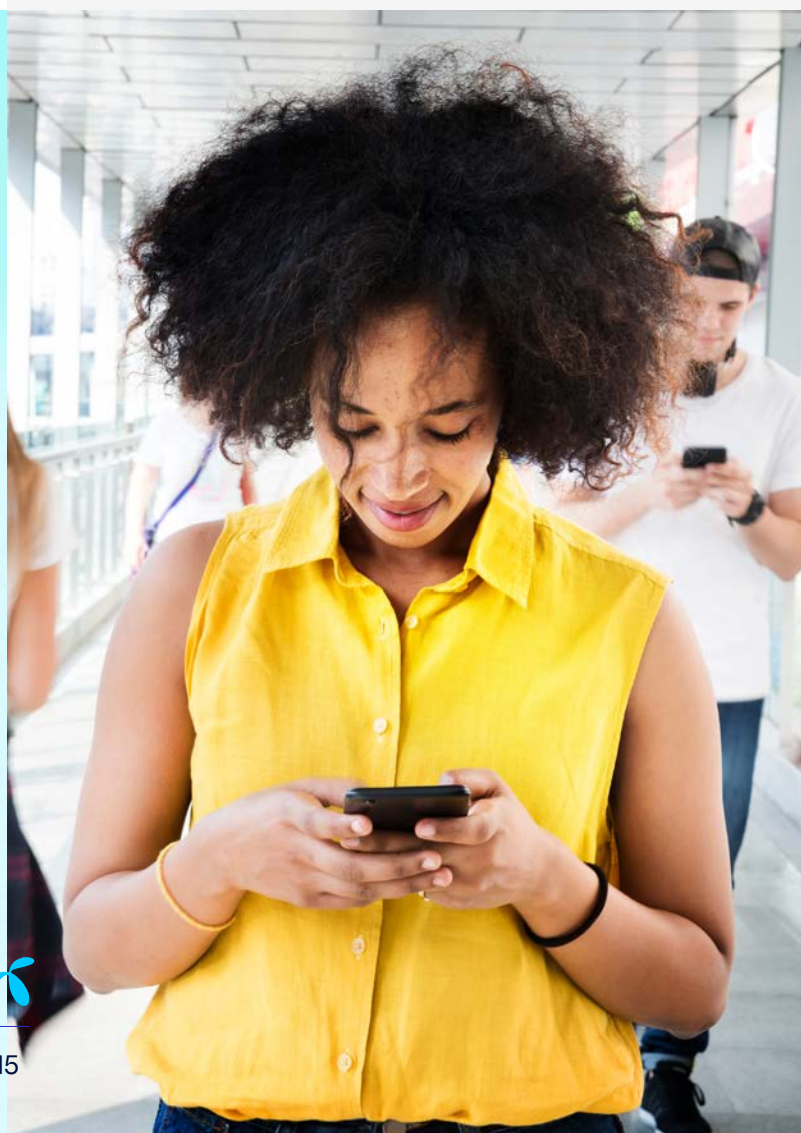
Baby Boomer

Good balance

78%

Overusing

12%



Chapter Two: Closing the digital divide

Women in the region unlocking significant benefits

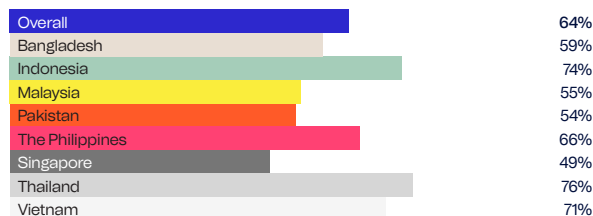
When we look at gender differences, more women (64%) believe mobile usage significantly improves their lives, as compared to men (52%). This trend is most apparent in Thailand (76%) and Indonesia (74%), where the highest number of women are connecting to 'significantly' better lives through their mobiles.

This points to mobile technology's potential to enrich the lives of women by connecting them with better access to information, entertainment, and more equal opportunities – with 47% of women saying mobile connectivity enhanced their options for working and generating income, compared with 40% of men. More women (54%) than men (44%) also indicate that they now have much greater access to education opportunities with mobile internet.

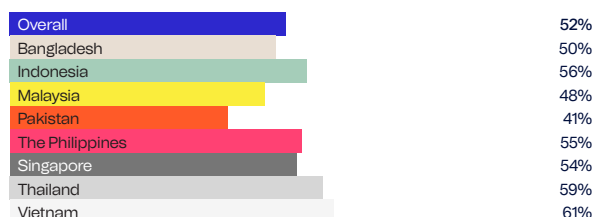
Interestingly, Singapore is the only market where this trend is reversed, with more males (54%) than females (49%) finding that mobile phones improve their lives significantly.

Mobile phone significantly improves quality of life

Female



Male



Women see greater potential in mobile usage



Women



Men

Better access to information for daily decision-making

71%

64%

Enhanced options for working and generating income

47%

40%

Greater access to education opportunities

54%

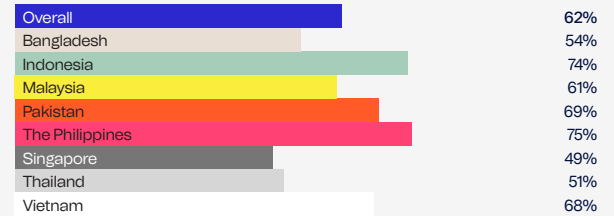
44%



Women were also found to be more avid users of mobile devices. Nearly two-thirds (62%) of women in the markets we studied said they spend an average of five hours on their phone, compared to just over half of men (51%).

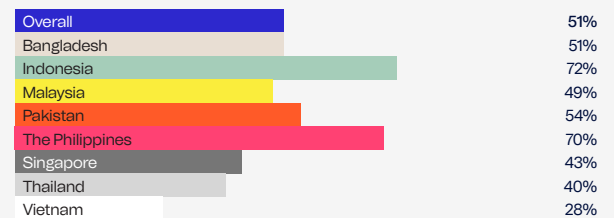
Spend at least 5 hours a day interacting with phone

Female



* Based on total female respondents

Male



* Based on total male respondents

Nearly two-thirds of women said they spend an average of five hours on their phone

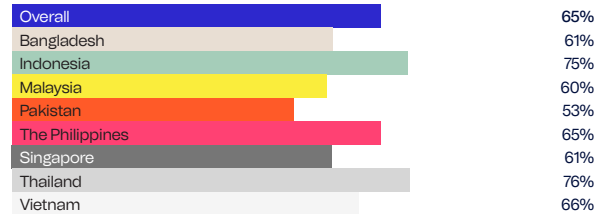


Bridging the urban and rural divide

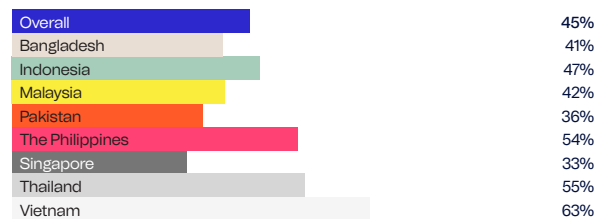
The impact of mobile connectivity in significantly improving quality of life is seen more visibly in city areas (65%), compared to just 45% in village or rural areas. Respondents living in cities in Thailand (76%) and Indonesia (75%) were more likely to see significant improvements in their quality of life than in all other markets. For rural dwellers, the highest impact on quality of life is seen for respondents in Vietnam, Thailand and the Philippines, with 63%, 55% and 54% respectively seeing significant improvements. Correspondingly, a larger number of people residing in cities (38%) than those living in village or rural areas (28%) expect to significantly increase their mobile usage in the next 12 to 24 months.

Mobile phone significantly improves quality of life

City



Rural



Rise in mobile usage



City

Increase

77%

Significantly increase

38%



Rural

Increase

69%

Significantly increase

28%





Financial inclusion has improved; access to education and healthcare are catching up

Increased mobile connectivity has also improved inclusion for most respondents. Majority indicate that mobile connectivity has given them greater access to services that are key to enriching their daily lives, such as education (88%) and healthcare services (88%).

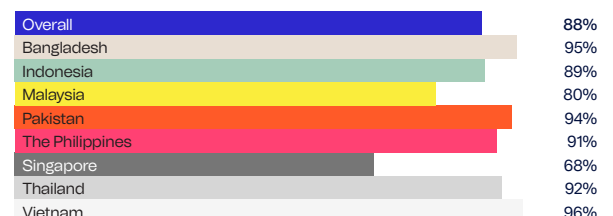
However, it is around financial inclusion where mobile devices are really levelling the playing field. 92% of respondents say having a mobile device has increased their access to financial services while more than half (57%) believe their access to financial services has significantly improved.

Mobile connectivity increases inclusion

Improves access to financial services



Improves access to education services



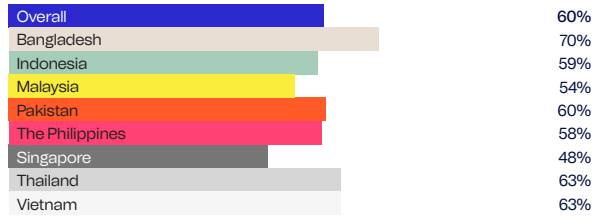
Improves access to healthcare services



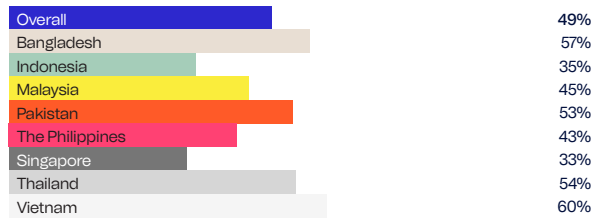
Mobile connectivity brings access to key services that people would not otherwise have had

Financial services

City

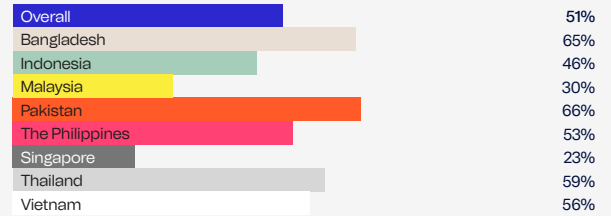


Rural / village

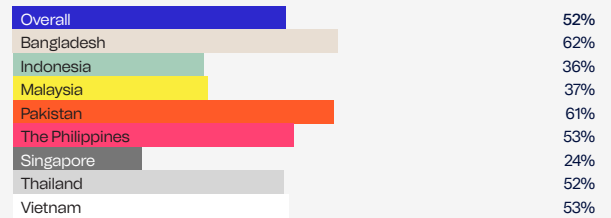


Education

City

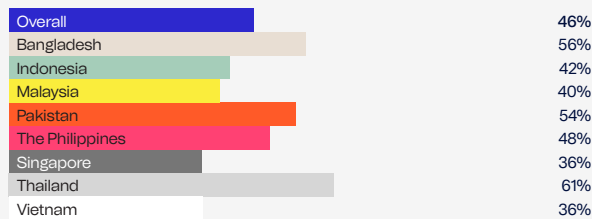


Rural / village

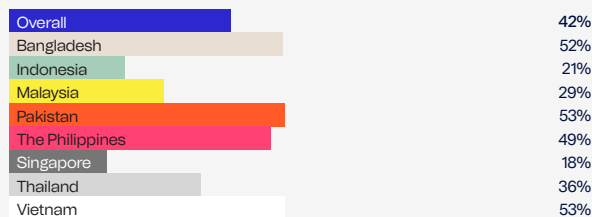


Healthcare

City



Rural / village



It is also worth noting the disparity between responses of those living in cities (60%) and rural areas (49%) who indicate the mobile connectivity provides greater access to financial services. This highlights the ongoing need to broaden the reach of these services to those outside urban areas.

Some differences between the markets are also seen, most notably between Singapore, the only city state in the study, and the other markets. In Singapore, significantly fewer respondents say that mobile devices have given them access to education, financial, and healthcare services that they otherwise would not have had.





"As shown in the survey, mobile internet and smartphones provide people with a plethora of possibilities when it comes to social relationships, education, health, work finances, and so on. The list seems endless. However, there is still a considerable share of people in these markets who face barriers in using such services. For instance, they might not have smartphones or just very basic ones, they might not have mobile internet access or an unreliable one, and they might lack the knowledge and skills to utilise the services. Thus, as we venture into the 2020s and beyond, it is crucial to work against what is often referred to as digital divides."

Dr. Wenche Nag
Senior Research Scientist, Telenor Research

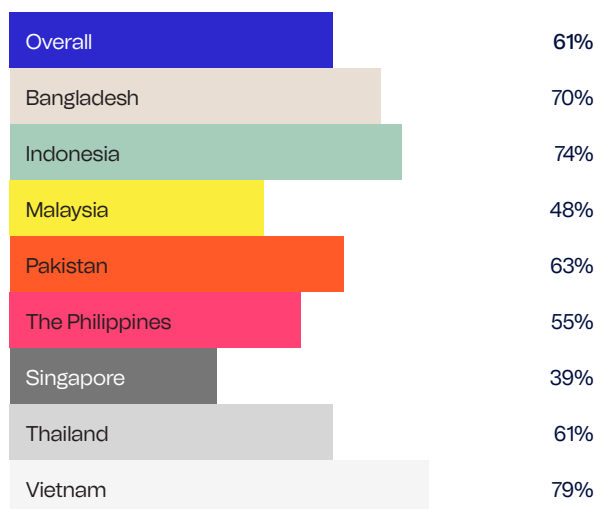
Chapter Three: Tapping into a sustainable future

The growing role of mobile technology in sustainable living

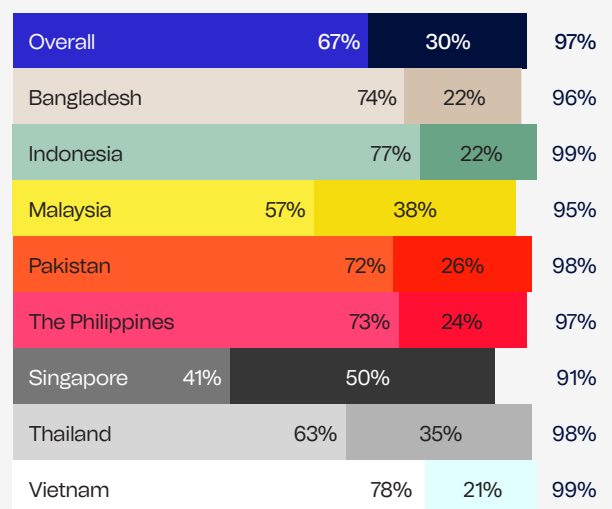
Close to two-thirds of respondents (61%) say they are very environmentally conscious. Interestingly, strong market variations exist, with people in Bangladesh (70%), Indonesia (74%) and Vietnam (79%) more likely to say they are very environmentally conscious than those in Malaysia (48%) and Singapore (39%).

This translates into how our respondents are increasingly viewing their mobile usage, with 97% now believing mobile phone access is an important factor for people living more environmentally sustainable lives in the future. This comes as a result of views that mobile access is helping to support a number of key areas of more sustainable living including reducing paper, waste, and electricity (70%), being able to communicate more efficiently (67%) and providing better access to public transport with more information (55%).

Viewing themselves as very environmentally conscious



Mobile phone important to living more sustainably



Very important Somewhat important





Baby Boomers recognise themselves as significantly less environmentally conscious than their younger peers

Generational differences in environmental consciousness

Very environmental conscious



Gen Z

64%



Millennial

63%



Gen X

58%



Baby Boomer

55%

Most notable is the difference in attitudes between some of the generations, with Baby Boomers recognising themselves as significantly less environmentally conscious than their younger peers (55% versus 64% of Gen Z).



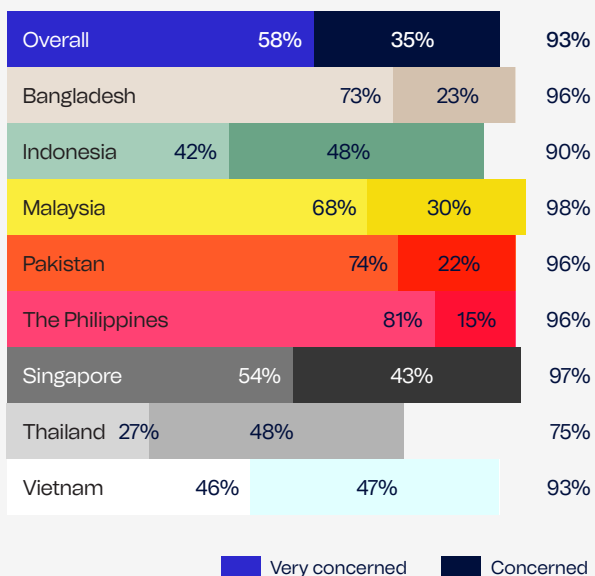
Privacy and security remain significant concerns

It is clear that there are significant benefits in owning and using mobile phones. However, security is a major concern for more than nine in 10 (93%) of our respondents, with well over half (59%) saying they are very concerned about the privacy and security of their mobile devices. Interestingly, overall concern about privacy and security was considerably lower in Thailand at 75%, compared to more than 90% for all other markets.

This concern is driving changes in behaviour for almost everyone. 98% of people say that privacy and security is now a factor in how, when and where they are using their devices as well as which apps they use and the services they access.



Concerned about privacy and security of devices



When viewed alongside concerns raised about keeping up with the pace of change, privacy and security need to be key considerations as the industry looks at critical skills for the digital economy and a hyper-connected world.





More than nine in 10 people believe that financial inclusion has improved because of their mobile usage



Conclusion

Telenor Asia's Digital Lives Decoded study shows the important role of mobile connectivity in empowering communities across Asia. However, we should not take respondents' enthusiasm and optimism as an excuse to stand still. Ensuring that technology continues to benefit all users requires continued progress in areas such as gender diversity, environmental sustainability, and driving usage in under-represented sectors. Here, we outline actions the industry can take, in partnership with multiple stakeholders.



1. Future-proof networks to keep pace with technological advances

People continue to immerse themselves in a digital world. Compared to before the pandemic, mobile data usage has more than doubled in most Asian markets, reshaping how we communicate at work and at home. We have seen digital usage by our 165 million customers growing by 60% in this same timeframe. Despite this digital acceleration, more than three in four respondents still expect to increase their time spent online in the next 12 to 24 months.

Meeting these future needs will require resilient and future-ready networks, to keep pace with technological advances. Readying underlying digital infrastructure for innovation requires early and long-term investments. This can be enabled through fair and transparent business environments, supported by consultative and collaborative regulatory processes.

2. Bridge the widest digital divides

As connectivity puts power into the hands of people, this study reveals where digital gaps remain, particularly in rural and elderly populations. To drive digital adoption and avoid people being left behind, the need to understand these gaps is becoming more important to policymakers, businesses, and individuals. For rural areas, concerted efforts are needed to increase the efficiency of investments through proactive policies – such as using universal service funds (USFs) to improve mobile infrastructure.

The study also showed that women who are connected spend more time than men with their mobile every day and see greater potential in this mobile use. Connected women are also more likely to see greater improvements to their daily lives, with mobile usage enhancing their options for working and generating income as well as giving them better access to information and education opportunities.



This further supports the importance of working to bridge the digital gender divide across Asia - especially in South Asia where disparities are starker. For example, in Pakistan, boys are four times more likely than girls to have mobile internet access.

3. Ensure skills for a digital future

There is also a common concern about keeping pace with rapidly changing technology, following a surge in digital adoption. This concern is even more pronounced among the younger generation. We believe that public-private collaborations are fundamental to helping enterprises and the workforce maximise their opportunities. Curriculums need to be updated to reflect the skills needed for the future. This includes online safety modules to ensure that the young are trained to use technology responsibly and safely.

4. Safeguard digital usage

With increasing consciousness around privacy and security, particularly notable among the older generations, managing these will be critical if mobile devices are to remain a cornerstone of our lives. Online safety is crucial to maintain trust, the bedrock of our digital future. Only with trust will people have confidence to participate in a digital world.

Building user awareness and competences is a first step towards ensuring safe and secure mobile usage. Supportive policies that safeguard privacy and security are also important to safeguard digital usage.

5. Address the climate dilemma

We also need to better understand the carbon footprint of our online habits, as we work together to create a future where mobile connectivity is empowering and sustainable for all. More data requires more energy and in view of this, we have a responsibility to focus on where the electricity we use comes from.



As businesses and digital players, we are one part of the solution – through demand we can create an ecosystem where there is more green/ renewable electricity available in national grids. At the same time, we need governments to rapidly develop greener grids and renewable energy focused policy frameworks in Asian markets. We need to work hand-in-hand to trigger change.

The study has reinforced the vital role that mobile connectivity plays in society, which came into sharp focus during the pandemic when billions of people became reliant on mobile technology and connectivity in nearly all aspects of life. Overall, these results should send a clear message to everyone connected with the mobile industry: people have high expectations for the improvements mobile technology can bring to their daily lives and believe digital solutions can be integral in tackling some of the major challenges facing the world today.



Market snapshots



Bangladesh

- Bangladeshi respondents feel the benefits of financial inclusion, driven by mobile usage, most strongly, with 66% expressing a significant positive impact compared to 57% overall.
- Baby Boomers in Bangladesh are most likely to report significant quality of life improvements from using their mobile phones (71%), compared to 45% for Baby Boomers overall.
- After social interaction (45%), respondents are most likely to cite work (35%) as the biggest reason for increased mobile use in the last 6-12 months – the highest among all markets and notably greater than the 28% average.
- They are also the most likely to use their phone to access entertainment on a daily basis – 61% versus 49% overall.
- While 98% of respondents feel confident about their digital skills, Bangladeshi respondents are also most likely to be concerned about keeping pace with technological changes, with 97% expressing concerns, compared to 85% overall.



Indonesia

- Indonesian respondents, alongside the Philippines, spend the greatest amount of time on their mobile phones, with 73% spending at least 5 hours a day, compared to 56% on average across all markets.
- Despite this, consumers here are most likely to feel that they have found a good balance with technology and are not overusing their mobile device – 88% compared to 76% overall.
- Indonesia sees the largest rural-urban divide in access to financial services among all markets. While 59% of city dwellers feel that their mobile phone has significantly improved their access to financial services, only 35% of those in rural areas believe this to be the case.
- Indonesians are most confident about their digital skills (99%). 34% express no concerns over being able to keep pace with changes in technology, against the average of 15%.





Malaysia

- Malaysian respondents (and their counterparts in Singapore) are least likely to find benefits in using education apps – 40% find them very useful compared to average of 56% – and banking apps (48% vs 54% overall).
- Similarly, they are less likely to find that their mobile devices significantly improve access to services: financial (51% vs 57% average), education (33% vs 49% average) and healthcare (35% vs 44% average).
- Malaysians are more inclined towards in-person communication – 52% rank spending time in-person with friends and family among the top three activities in their free time, compared to 47% overall. Fewer (60% vs 67% average) place connecting with friends and family online or through social media among their top leisure activities.
- One in three Gen Z respondents here cite privacy and security concerns as the top reason for reducing mobile usage in the past year, the highest across all markets.



Pakistan

- Respondents in Pakistan are least likely to feel that their mobile phone significantly improves their quality of life (47%), compared to 58% overall.
- They are also least likely to feel that their mobile phone improves their relationships with family members – 63% versus 75% overall.
- Respondents in Pakistan are most likely to be concerned about striking a good balance with mobile technology – 26% feel they are overutilising technology, compared to 19% overall.
- Baby Boomers in Pakistan (along with those in the Philippines) lead the way regionally in terms of the number of hours spent per day on their mobile, with 59% spending at least 5 hours per day on their phone. This compares to an average of 41% for Baby Boomers in the region.
- Baby Boomers in Pakistan also stand out as the generation most likely to increase already significant amounts of time with their mobile devices – 70% expect to further increase mobile usage over the next 1-2 years.





Philippines

- Respondents in the Philippines are heavy users of mobile phones – they are most likely to spend at least 90% of the day with their mobile phone (53%) compared to a 41% average across all markets.
- Their affinity towards their mobile devices could be attributed to the social benefits they bring:
- Mobile devices bring Filipinos the greatest quality of life benefits by providing them with greater connectivity with friends and family (91%), compared to an average of 82%.
- They are also the most likely to engage in social networking on a daily basis via their mobile (70%) compared to a 54% average.
- Filipinos are most likely to rate using their mobile for e-learning (90% vs 82% average) and work (93% vs 83% average) as beneficial to their quality of life compared to consumers in other markets.
- Despite significant mobile usage levels, Filipinos are also most likely to say that they are very concerned about mobile privacy and security (81%), versus 58% on average.



Singapore

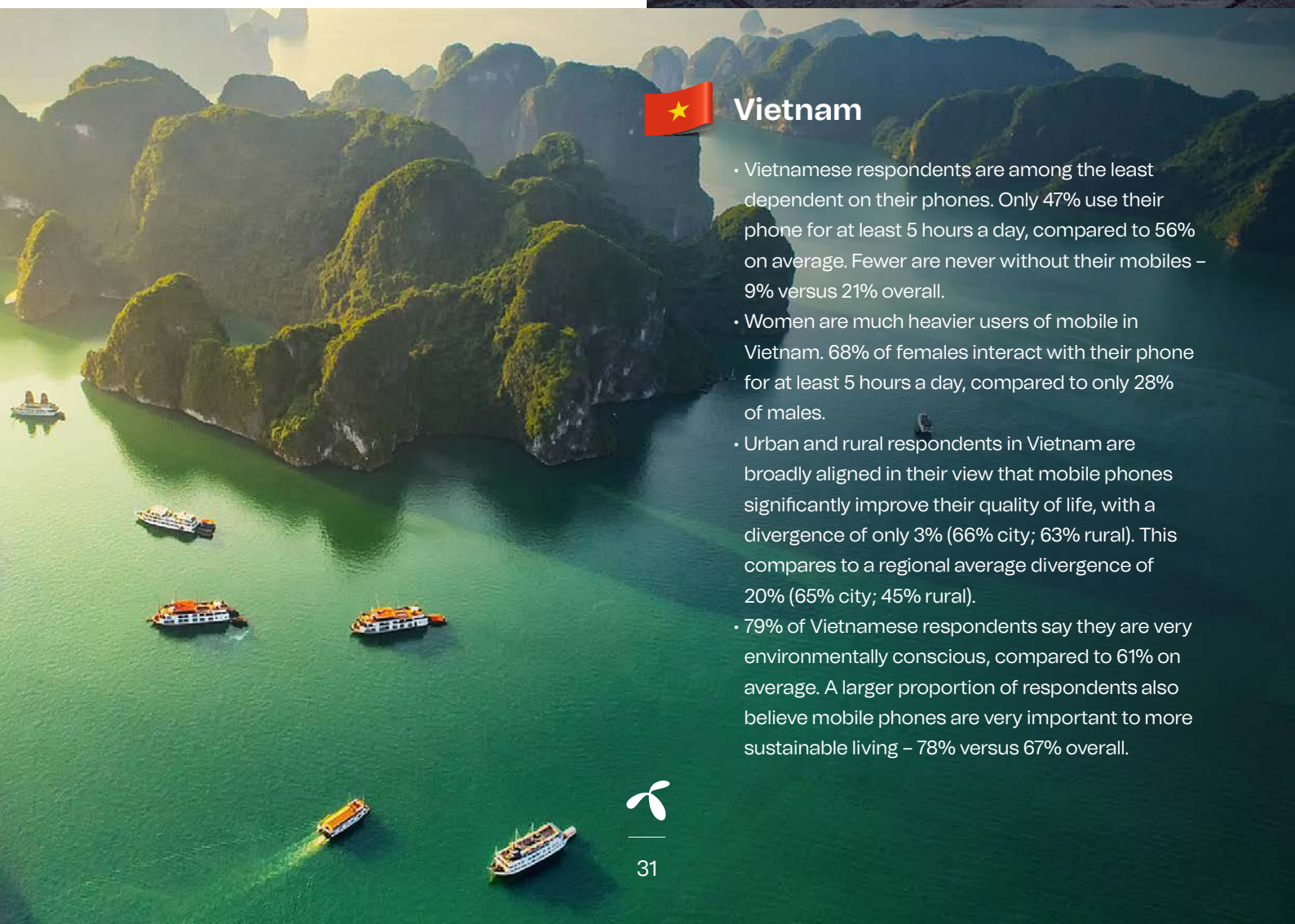
- Across the region, respondents in Singapore report the lowest increase in mobile phone usage (27% vs 35% average) over the past 6 months. 63% say they expect to increase usage in the next 1-2 years, compared to 74% overall.
- Singaporeans are least likely to say they have found a good balance with technology (69% vs 76% average).
- More men (54%) than women (49%) in Singapore say that mobile phones have significantly improved their lives, a contrast to the rest of the region where the trend is reversed (64% of women vs 52% of men).
- They are least likely to rate apps for work (31% vs 56% average), education (30% vs 56% average) and banking (38% vs 54% average) very useful.
- Singaporeans are also least likely to say that their relationship with friends (65% vs 79% average), family members (65% vs 75% average) and co-workers (56% vs 74% average) have improved due to their mobile phone.





Thailand

- Thai respondents are most likely to feel that their mobile usage significantly improves their quality of life (69%), compared to an average of 58% for all markets surveyed.
- They are least likely to be very concerned over privacy and security issues related to mobile use (28%), compared to an average of 59%.
- Thai respondents also express the greatest confidence in keeping pace with future technological changes, with only 63% sharing concerns in this area, compared to an average of 85%.
- Given the benefits they see, Thais are most likely to significantly increase their mobile usage over the next 1-2 years – 50% versus 38% overall.
- Over half of city dwellers (55%) in Thailand expect to increase their mobile usage over this period, compared to 40% of those living in rural areas.



Vietnam

- Vietnamese respondents are among the least dependent on their phones. Only 47% use their phone for at least 5 hours a day, compared to 56% on average. Fewer are never without their mobiles – 9% versus 21% overall.
- Women are much heavier users of mobile in Vietnam. 68% of females interact with their phone for at least 5 hours a day, compared to only 28% of males.
- Urban and rural respondents in Vietnam are broadly aligned in their view that mobile phones significantly improve their quality of life, with a divergence of only 3% (66% city; 63% rural). This compares to a regional average divergence of 20% (65% city; 45% rural).
- 79% of Vietnamese respondents say they are very environmentally conscious, compared to 61% on average. A larger proportion of respondents also believe mobile phones are very important to more sustainable living – 78% versus 67% overall.



