



TELENOR ASIA DIGITAL LIVES DECODED

Part One: Live

Telenor Asia's **Digital Lives Decoded** study surveyed over 8,000 mobile internet users across eight markets in South and Southeast Asia on the impact mobile devices are having on the way they live, with a focus on quality of life, relationships, and outlook for the future.

A common appreciation for an "always-on" life

93% mobile usage improves quality of life

With women leading this trend



64%
women



52%
men

say mobile phones have "significantly improved" their lives

Greatest improvement in quality of life in Southeast Asia



Vietnam
98%



Indonesia
97%

With South Asian markets less convinced



Bangladesh
91%

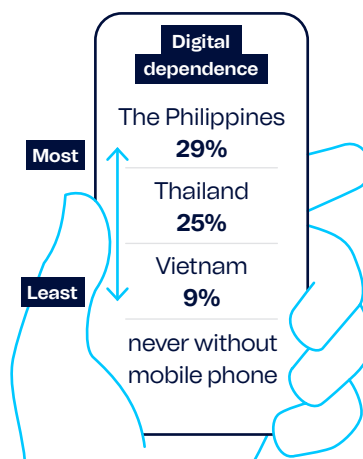
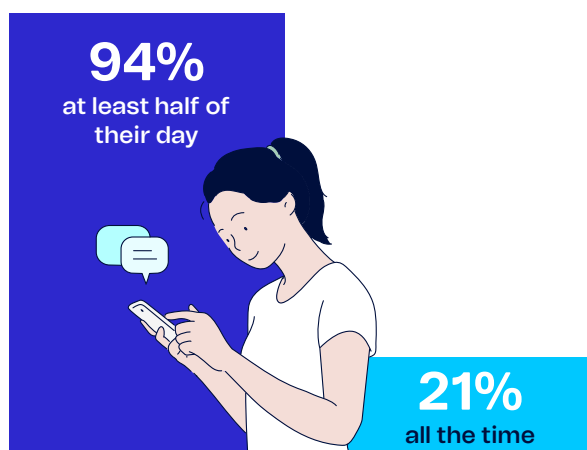


Pakistan
88%

Five key trends for continued surge in digital adoption

1. Swiping up for an always-on lifestyle

Respondents surveyed have their phone with them for large parts of the day



74%
expect to increase mobile usage in next 12 to 24 months

Trend greatest in **Thailand** at **82%**

Vietnam catching up with **81%** forecasting increased mobile use

Gen Z more likely to feel they are overusing technology

Average

19%

Gen Z

26%

...**76%** believe they have struck a good balance on technology usage

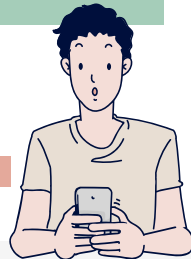
2. Keeping up as digital life charges ahead

85% worry about skills keeping pace with technology changes

Most concerned



Least concerned



Younger respondents also more concerned about digital skills keeping pace with technology changes



Gen Z

55%



Millennial

50%



Gen X

41%



Baby Boomer

41%

"Very concerned" about keeping pace

3. (Lack of) trust in the digital world

Privacy and security of mobile devices a concern for **93% of respondents**

People in Thailand are least concerned



versus



Younger respondents are more concerned

64%

Gen Z

59%

Millennials

55%

Gen X

56%

Baby Boomers

"Very concerned" about privacy and security

4. Tapping into a more sustainable life

People are optimistic about the potential of mobile technology to lead more sustainable lives

67% of those surveyed believe that digital access is "very important" for them to lead greener lives in the future.



Key benefits

70%

reduce paper, waste and electricity

67%

more efficient communications

55%

better access to public transport with more information

5. Mobile technology is closing divides

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%

Levelling the playing field

Better access

Education services

88%

Healthcare services

88%

Greater financial inclusion

Increase in access to financial services

92%

Significant increase

57%

Disparities persist between urban and rural areas



City

60%



Rural

50%

Greater access to financial services

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.