TELENOR ASIA DIGITAL LIVES DECODED

Part Three: Play

Decoding changing attitudes towards mobile connectivity in South and Southeast Asia

January 2023

Consumers in Asia are turning to mobile devices to boost their leisure time, switching downtime pursuits into 'up-time' opportunities.

Foreword

From virtual worlds to real-life communities, mobile access has flipped how we spend our "downtime" on its head.

The third instalment in our Digital Lives Decoded series examines the changing spectrum of people's leisure-time pursuits and pastimes – all now supercharged by a more digitally-savvy, post-pandemic population.

Two-thirds of people socialise more online than they do in real life; but rather than this being a negative trend, more than half of our respondents feel they are more socially connected as a result.

People are convincingly upbeat about the impact mobile has on their social lives, helping them stay better connected with loved ones and build virtual communities with strangers based on shared interests. People are also spending a good chunk of their downtime tapping into online education or on-the-go learning apps. Close to one-third access educational apps daily, while four in ten believe the learning enabled by mobile technology has significantly improved their lives.

The standout finding from this report is around gaming. Mobile access has changed how people game and who gamers are. Thanks to the mobile, gaming has become a mass phenomenon, embedding virtual interactions and virtual worlds into daily life. This pastime is more inclusive and accessible than ever before, reaching across genders and generations. The increased number of people playing games is also driven by a relatively recent phenomenon: social gaming. Close to half of those surveyed expect to spend even more time on this in the next two years.

We see that gaming is bringing positive impact to real-life communities, reinforcing relationships and transforming the way we go about daily tasks. With that growth comes higher expectations of network operators as people seek more dependable, faster networks. Consumers recognise that this comes at a premium.

The metaverse has huge potential as a gaming platform of the future. While it is yet to fully capture the interests of consumers, people do recognise that their mobile phones have put a portal to the future in their hands as the metaverse slowly edges towards reality. The growing interest in the metaverse is creating an opportunity for telecoms operators to expand beyond the traditional, towards new capabilities and services – becoming not only an enabler of the technology through provision of 5G capabilities, but also a co-creator in the metaverse.

With all the new possibilities paved by the mobile, the average mobile user today literally has the world at his or her fingertips. Moving from passive user to active co-creator in virtual realities, he or she will become the new face of the customer we as network operators and businesses need to understand and keep up with. We hope the third part of our study will help to shed some light into the psyche of today's consumer as they live, work and play.

Jørgen C. Arentz Rostrup
Head of Telenor Asia

Research methodology

Launched in conjunction with Telenor Asia's 25th anniversary, the "Digital Lives Decoded" study is a three-part series looking at the role of mobile connectivity in how we live, work, and play.
The third instalment takes a slightly different track to look at the way many of us are now spending our leisure time. It includes data points from a survey undertaken in July 2022 of 8,227 mobile internet users spread across eight markets in South and Southeast Asia: 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 in the study was not disclosed.

Chapter One: Switching off by switching on

Mobile devices supercharge downtime

In previous Digital Lives Decoded reports, we have seen the role mobile connectivity has played in helping people supercharge their careers and earning potential as well as how it improves daily life. Nine in ten people are more dependent on their phone for leisure now than two years ago. Nearly half (47%) said their reliance has increased significantly, most keenly felt in Vietnam and Thailand where more than nine in ten feel more dependent on their devices than ever before.

Dependency on mobile phones for downtime activities over the last 2 years

Significantly increased

Overall	**47%**
Bangladesh	62%
Indonesia	39%
Malaysia	40%
Pakistan	48%
The Philippines	47%
Singapore	32%
Thailand	58%
Vietnam	50%

Somewhat increased

Overall	**42%**
Bangladesh	31%
Indonesia	48%
Malaysia	47%
Pakistan	42%
The Philippines	42%
Singapore	45%
Thailand	35%
Vietnam	45%

No change

Overall	**10%**
Bangladesh	6%
Indonesia	12%
Malaysia	12%
Pakistan	8%
The Philippines	11%
Singapore	22%
Thailand	6%
Vietnam	4%

One of the key reasons given is socialising online. For many, this was the only way to stay connected with loved ones during the pandemic. However, the habits we formed during the two-plus years seem to have become hard-wired in the way we live our lives today, with two-thirds (66%) saying they now socialise more online than in real life.

Younger generations tend to spend more time socialising online than their older peers, but Baby Boomers feel most connected to their loved ones as a result of mobile technology. More than half of our respondents (55%) say they feel more connected to the people they know because of social media while nearly half (47%) regularly meet new people online.

Socialising virtually has taken off over the last 2 years

I socialise more virtually than in-person

Overall	**66%**
Bangladesh	74%
Indonesia	75%
Malaysia	60%
Pakistan	66%
The Philippines	77%
Singapore	49%
Thailand	56%
Vietnam	71%

I regularly meet new people online

Overall	**47%**
Bangladesh	54%
Indonesia	45%
Malaysia	43%
Pakistan	44%
The Philippines	39%
Singapore	36%
Thailand	66%
Vietnam	50%

I feel more connected to people I know

Overal	**55%**
Bangladesh	61%
Indonesia	47%
Malaysia	55%
Pakistan	49%
The Philippines	58%
Singapore	51%
Thailand	63%
Vietnam	55%

I feel less connected to people I know

Overal	**23%**
Bangladesh	27%
Indonesia	17%
Malaysia	25%
Pakistan	22%
The Philippines	19%
Singapore	34%
Thailand	27%
Vietnam	16%

Baby Boomers are staying better connected and creating new social opportunities due to their mobile devices. 76% expect to increase time spent on social media in the next two years.

Socialising through mobile devices is having a positive impact across generations

	Gen Z	Millennial	Gen X	Baby Boomer
I socialise more virtually than in-person	70%	67%	62%	65%
I regularly meet new people online	48%	49%	47%	36%
I feel more connected to people I know	54%	52%	58%	63%
I feel less connected to people I know	22%	25%	22%	25%

Key to this trend is social media; around half of our respondents spend more than three hours a day using social media, and just over one in ten (12%) spend more than seven hours per day. This is greater than the time spent on gaming, streaming content, listening to music or podcasts and investing, and looks set to grow. Facebook remains the number one place to socialise online (88%), but other platforms are beginning to make inroads with Instagram and TikTok appealing to younger generations.

Top social media apps by generation

	Overall	Gen Z	Millenial	Gen X	Baby Boomer
Twitter	46%	45%	51%	41%	34%
Facebook	88%	84%	88%	90%	85%
Messenger Apps	67%	69%	67%	64%	64%
Instagram	61%	72%	63%	54%	47%
TikTok	46%	53%	47%	42%	36%

Time spent engaging in social media with the mobile phone

Less than one hour

Overall	**20%**
Bangladesh	23%
Indonesia	12%
Malaysia	23%
Pakistan	19%
The Philippines	12%
Singapore	34%
Thailand	8%
Vietnam	25%

3-6 hours

Overall	**36%**
Bangladesh	35%
Indonesia	43%
Malaysia	38%
Pakistan	38%
The Philippines	39%
Singapore	25%
Thailand	38%
Vietnam	34%

More than 7 hours

Overall	**12%**
Bangladesh	12%
Indonesia	13%
Malaysia	8%
Pakistan	12%
The Philippines	23%
Singapore	6%
Thailand	19%
Vietnam	5%

Time spent engaging in social media with the mobile phone – by generation

Less than one hour

Gen Z	Millennial	Gen X	Baby Boomer
22%	18%	17%	31%

3-6 hours

Gen Z	Millennial	Gen X	Baby Boomer
36%	39%	34%	26%

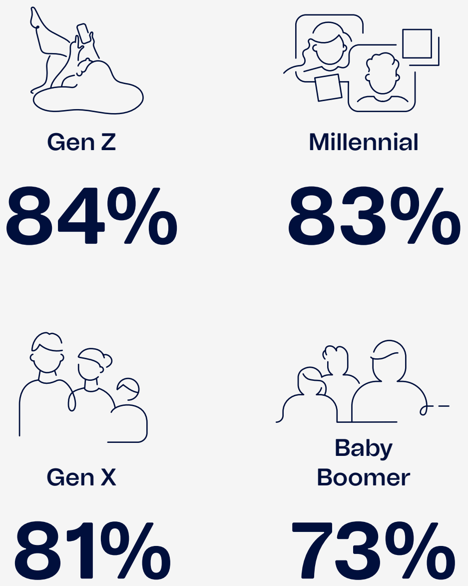
More than 7 hours

Gen Z	Millennial	Gen X	Baby Boomer
12%	14%	12%	5%

Downtime has become uptime

While social media is the mainstay of people's downtime, it is not the only use of their mobile devices. Respondents across the region are increasingly looking to their mobile devices for personal upskilling and development. 40% of respondents are using mobile devices to tap into learning and educational apps or websites, with women and younger generations most likely to experience the benefits. More than half of Gen-Zs (51%) surveyed said that learning on their mobile has significantly improved their quality of life, in contrast to only one quarter (25%) of older generations.

Learning on educational apps is improving quality of life



The growing desire for consumers in the region to learn on-the-go and enhance their personal development during downtime is reflected by 45% of respondents who spend at least an hour a day listening to podcasts.

This is exemplified by the results in Indonesia, which show that nearly six in ten Indonesians listen to podcasts for an hour or more a day.

People across the region are increasingly using their mobile devices for self-improvement, personal upskilling, and development. 82% believe that these learning opportunities positively impact their quality of life.

Time spent listening to podcasts

At least one hour

Overall	**45%**
Bangladesh	40%
Indonesia	57%
Malaysia	41%
Pakistan	34%
The Philippines	44%
Singapore	41%
Thailand	66%
Vietnam	40%

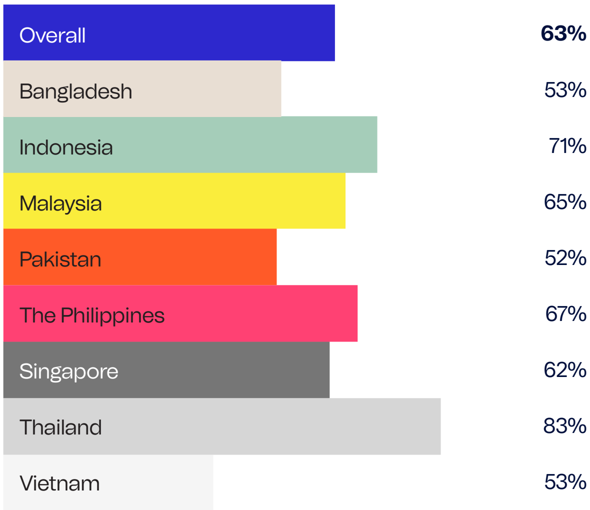
On-demand content losing ground?

Online media consumption has grown significantly over the past few years. The increasing number of devices capable of supporting digital media as well as faster internet speeds, has provided consumers with options to access media content of their choice anytime, anywhere.

While 63% of consumers in the region stream on-demand content for at least one hour a day, it is significantly skewed towards Millennials and Gen X. Alongside Baby Boomers, Gen Z's are least likely to spend time streaming on-demand content – preferring to spend their downtime on social media, gaming or listening to music.

Time spent streaming on-demand content

At least one hour a day



Our research shows that consumption of on-demand content is at it highest in Thailand, where an astounding 83% of people stream this form of content in some way for at least an hour a day. On the flip side, the South Asia countries Bangladesh and Pakistan have far fewer people streaming on-demand content at 53% and 52% respectively.

Time spent streaming on-demand content – by generation

At least one hour a day

Gen Z

54%

Millennial

68%

Gen X

66%

Baby Boomer

52%

While social and gaming channels have evolved rapidly over the past years, streaming video on-demand (SVOD) need to move quickly to remain relevant, particularly to younger users who are both price sensitive and less loyal. Our research suggests that only a third (37%) of people are likely to spend more time watching streamed content in the next one to two years. This pales in comparison to those who expect to spend more time socialising via social media (74%) or through social gaming on their mobile (45%).

Chapter Two: What people are playing

By 2025 more than four in five people[1] in Asia Pacific will have a smartphone. Those numbers are even higher in Southeast Asia where predictions[2] show that nearly nine in ten people will be a smartphone user by the end of this year.

Smartphone penetration is a key reason behind the growth of mobile gaming. Asia is home to 1.3 billion[3] mobile gamers, more than North America, Europe and Latin America combined. Today, gaming is the world's largest entertainment industry with an estimated revenue of US$196.8 billion in 2022[4] alone.

Estimates show that 82% of Southeast Asia's urban population are gamers. Across the region, China, Japan, and South Korea lead the gaming market, but Indonesia, Vietnam, the Philippines, and Thailand are quickly catching up.

This surge in gaming is evident among respondents surveyed. Four out of five respondents play mobile games in some way, with close to a third (31%) playing every single day. And it's not just the stereotypes of young men playing; our research shows that there is an even split among men and women, perhaps reflecting the wide appeal of mobile gaming versus console or PC.

1. https://www.gsma.com/mobileeconomy/wp-content/uploads/2022/07/GSMA_APAC_ME_2022_R_Web_Final.pdf
2. https://www.insiderintelligence.com/content/upside-internet-user-growth-remains-high-southeast-asia
3. https://mobidictum.biz/asia-has-around-1-3-billion-mobile-gamers/
4. https://newzoo.com/insights/trend-reports/newzoo-global-games-market-report-2022-free-version

Across South and Southeast Asia, people are playing mobile games a lot

I play games occasionally

Overall	**40%**
Bangladesh	42%
Indonesia	38%
Malaysia	44%
Pakistan	38%
The Philippines	37%
Singapore	41%
Thailand	38%
Vietnam	41%

I play often (2-3 times a week)

Overall	**29%**
Bangladesh	28%
Indonesia	30%
Malaysia	32%
Pakistan	23%
The Philippines	25%
Singapore	27%
Thailand	32%
Vietnam	36%

I play everyday

Overall	**31%**
Bangladesh	29%
Indonesia	30%
Malaysia	25%
Pakistan	25%
The Philippines	31%
Singapore	24%
Thailand	44%
Vietnam	41%

I do not play mobile games

Overall	**20%**
Bangladesh	31%
Indonesia	12%
Malaysia	22%
Pakistan	29%
The Philippines	13%
Singapore	29%
Thailand	11%
Vietnam	15%

There is no gender divergence between the amount of time playing games

	Male	Female
Less than one hour	26%	24%
1-2 hours per day	33%	30%
3-4 hours per day	16%	17%
Over 5 hours per day	10%	11%
None	15%	18%

In some markets, 5G is also driving the move to cloud-based gaming. This technology has disrupted the hegemony of consoles as the dominant platform and opened the market to new competitors, attracted by the lower cost of entry. While cloud gaming is still in its infancy, it is already broadening the appeal of games by increasing the number of devices that can be used to play.

Mobile access has completely changed how people game and who gamers are. A staggering 80% of people play mobile games and one in three play every single day.

Growing interest in online social gaming

Just as social media has allowed communities to create content and interact with each other, we have also seen the growth in social gaming taking these opportunities one step further – empowering people to step into and play games with others in virtual worlds.

Triggered by a significant increase in leisure time during the COVID lockdowns, social gaming took off and will likely remain a significant leisure pursuit for years to come. 45% of our respondents said they expected to spend more time online social gaming – a trend that is consistent among all generations and relatively equal among both men and women.

People expect to spend more time on social gaming in the next 1-2 years

Female

Overall	**43%**
Bangladesh	41%
Indonesia	42%
Malaysia	38%
Pakistan	35%
The Philippines	40%
Singapore	27%
Thailand	64%
Vietnam	49%

Male

Overal	**48%**
Bangladesh	44%
Indonesia	47%
Malaysia	46%
Pakistan	41%
The Philippines	53%
Singapore	37%
Thailand	59%
Vietnam	58%

That is clearly good news for games publishers and developers such as Epic, Riot and Tencent, which incorporate a social element to their gameplay. That creates user 'stickiness' and ensures players come back time after time, rather than switching to a new game.

In-game spending is growing

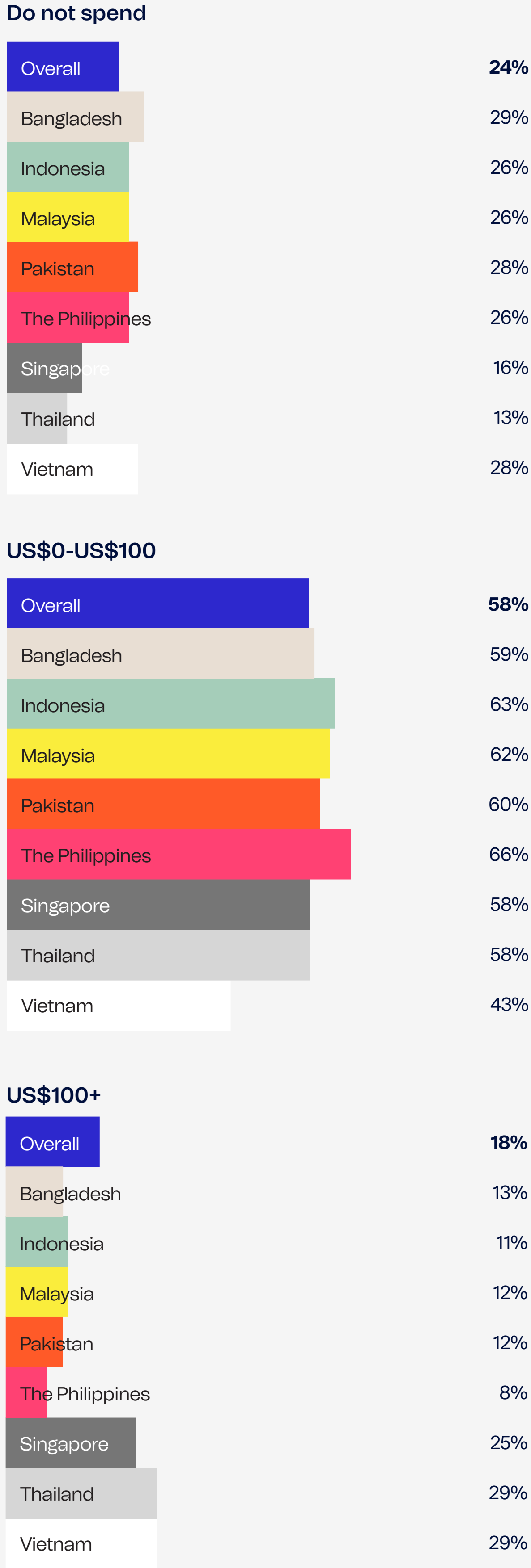
Nearly one in two respondents spend money on games and in-game features, with more than half spending at least US$10 per year on in-game items such as power-ups (40%), cosmetics / skins (32%) and timesavers (32%).

Almost one in five (18%) respondents spend at least US$100 a year on in-game items. Interestingly, the highest spenders are the Baby Boomers, with one in five spending between US$100 and US$300, and one in ten spending more than US$300 a year. In contrast, Millennials and Gen X spend between US$10 and $100 a year.

Annual spend on in-game items

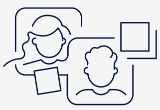
	Gen Z	Millennial	Gen X	Baby Boomer
Do not spend	28%	22%	23%	34%
Below US$10	27%	25%	22%	12%
US$10-US$100	27%	38%	35%	22%
US$100-US$300	16%	13%	13%	21%
Over US$300	3%	3%	7%	11%

Amount spent on in-game items per year



Just as social media has allowed communities to create content and interact with each other, we have also seen the growth in social gaming taking these opportunities one step further – empowering people to step into and interact with others in virtual worlds.

Mobile games spend by generation

	Gen Z	Millennial
Yes	54%	54%
No	46%	46%


	Gen X	Baby Boomer
Yes	43%	31%
No	57%	69%

Overall, the generational gap on mobile games spending is noticeably small, with 54% of Gen Z and Millennials, 43% of Gen X, and 31% of Baby Boomers, all spending at least some money on purchasing mobile games.

2023 represents a golden opportunity for developers and everyone else connected with mobile gaming to create an environment that is trusted while still delivering the gaming experience users want.

Noticeably, our research shows that the countries with the highest percentage of people spending at least some money on mobile games is Thailand (87%) and Singapore (84%).

Mobile eSports is the future

Asia has become the world's largest and most important market for eSports, driven by the market's growing appetite for mobile gaming, and extensive deployment of 5G networks. While China remains the world's largest eSports market by revenue, Southeast Asia is the world's fastest growing eSports market - expected to grow from US$39.2 million in 2021 to US$72.5 million in 2024[5] .

Close to two-thirds (64%) of our respondents either watch eSports or video game streamers. The audience tends to skew towards the younger and male (68%), with Gen Z more likely to watch than any other group.

Viewership of eSports or video-game streamers

Yes

Overal	**64%**
Bangladesh	71%
Indonesia	68%
Malaysia	58%
Pakistan	57%
The Philippines	71%
Singapore	43%
Thailand	69%
Vietnam	76%

No

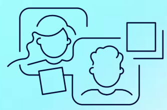
Overal	**36%**
Bangladesh	29%
Indonesia	32%
Malaysia	42%
Pakistan	42%
The Philippines	30%
Singapore	58%
Thailand	31%
Vietnam	24%

Viewership of eSports or video-game streamers - by generation

Proportion of those who watch

Gen Z

73%



Millennial

69%

Gen X

55%

Baby Boomer

48%

5. https://asia.nikkei.com/Business/Media-Entertainment/Southeast-Asia-s-red-hot-eSports-scene-draws-global-brands-as-sponsors

Viewership of eSports or video-game streamers - by generation

People who do not watch

Gen Z	Millennial	Gen X	Baby Boomer
27%	31%	45%	52%

Viewership of eSports or video-game streamers - by gender

	Male	Female
Yes	68%	60%
No	32%	40%

Nearly six in ten (59%) are willing to pay to watch eSports or support their favourite streamers. What is interesting is that among the group willing to pay to watch, they would rather do so with a mobile bundle (43%) than to pay a fixed fee (16%). There are natural variations across the region, though, with those in the Philippines, Vietnam and Bangladesh most drawn to watching while those in Singapore are least likely to watch, or pay for, eSports coverage.

Majority would pay to watch eSports or support favourite streamers

Yes, with a mobile bundle

Overal	**43%**
Bangladesh	48%
Indonesia	54%
Malaysia	40%
Pakistan	41%
The Philippines	35%
Singapore	34%
Thailand	45%
Vietnam	50%

Yes, for a fixed fee

Overal	**16%**
Bangladesh	17%
Indonesia	8%
Malaysia	15%
Pakistan	14%
The Philippines	25%
Singapore	12%
Thailand	18%
Vietnam	16%

No

Overal	**41%**
Bangladesh	35%
Indonesia	38%
Malaysia	45%
Pakistan	45%
The Philippines	41%
Singapore	54%
Thailand	37%
Vietnam	33%

Amidst the growth and popularity around gaming, there is ambivalence around its impact on our lives. Half the respondents (51%) say gaming has a positive impact on their life. Around a third (38%) say it has no impact while over one in ten (11%) believe it has a negative effect on their lives.

Younger respondents – particularly Gen Z and Millennials – are most likely to feel the greatest positive impact while Baby Boomers tend to feel gaming has little impact on their lives.

In terms of geographic split, Vietnam (64%) and Bangladesh (58%) are the most positive on the impact of gaming on their lives. Indonesia is simultaneously the most negative (15%) and the least enthusiastic about the positive impact gaming can have on user's lives (39%).

Impact of gaming habits and spending on personal life – by generation

	Gen Z	Millennial	Gen X	Baby Boomer
Significant positive impact	28%	25%	23%	16%
Positive impact	25%	30%	24%	20%
Neutral	34%	35%	41%	48%
Negative impact	11%	8%	9%	10%
Significant negative impact	2%	2%	2%	6%

Impact of gaming habits and spending on personal life

Significant positive impact

Overal	**24%**
Bangladesh	33%
Indonesia	14%
Malaysia	25%
Pakistan	22%
The Philippines	18%
Singapore	20%
Thailand	31%
Vietnam	32%

Positive impact

Overal	**27%**
Bangladesh	25%
Indonesia	25%
Malaysia	27%
Pakistan	26%
The Philippines	26%
Singapore	25%
Thailand	28%
Vietnam	32%

Neutral

Overal	**38%**
Bangladesh	29%
Indonesia	46%
Malaysia	37%
Pakistan	38%
The Philippines	48%
Singapore	41%
Thailand	34%
Vietnam	31%

Negative impact

Overall	**9%**
Bangladesh	11%
Indonesia	13%
Malaysia	8%
Pakistan	13%
The Philippines	7%
Singapore	11%
Thailand	4%
Vietnam	4%

Significant negative impact

Overall	**2%**
Bangladesh	3%
Indonesia	2%
Malaysia	3%
Pakistan	2%
The Philippines	1%
Singapore	3%
Thailand	3%
Vietnam	1%

Gaming in action: Pakistan

GameBird is Telenor Pakistan's first Esports platform. Launched in 2022 amidst a burgeoning Esports industry, it is Pakistan's top Esports platform, having hosted over 150+ tournaments and 30+ broadcasts of most popular gaming titles. To date, the platform has a digital footprint of 400,000 users and more than 60,000 monthly active users.

The second largest country in South Asia, Pakistan and its vibrant online gaming community has seen significant growth in the gaming and Esports space in recent years. The number of gamers in Pakistan is estimated to be 36.8 million (or 16% of the population) in 2022 and this is predicted to increase to 50.9 million, or 20.7% of the population by 2027.

Through Gamebird, gaming enthusiasts can be part of online and offline competitions and leagues, stream tournaments and access the latest news and development on gaming. GameBird athletes have notably represented Pakistan at various tournaments worldwide, including the 2022 Commonwealth Games in Birmingham, Global Esports Games in Istanbul, GET Riyadh, FreeFire World Series and Red Bull Campus Clutch Series in Brazil.

GameBird also serves as a publisher for game developers to bring their creations to a wider audience. The Developers' Game Jam: GameBird Edition Hackathon is one recent example, bringing together a growing community of game designers, developers, artists, and writers on a common platform to learn new skills and create video games of the future.

Gamebird is set to strengthen Pakistan's emerging gaming industry, which is estimated to be worth USD$160 million by 2027.

Chapter Three: Impact of play

Contrary to widely-held beliefs, mobile phones do not detract us from having social lives. In fact, people point to the positive impact of mobile phones on their lives - 93% say mobile phones improve their lives, 82% state that it enables greater connectivity with friends, family, and colleagues, and 57% say it is a source of personal entertainment.

Modern mobile phone users have grown up with social media, therefore it should be no surprise that many of our apps and habits are inherently bound to social usage. People are using mobile technology to connect more with loved ones, keeping open the channels of communication even when they cannot physically be together. As Asia steadily becomes a more urban society with younger generations moving away from their more rural homes, this is a trend that will help bind families and friends together.

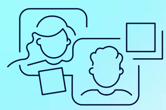
Moreover, people are connecting outside of their immediate family to build communities. 74% of respondents say that they expect to spend more time on social media over the next 2 years. Facebook, as noted earlier, remains the clear favourite for social interactions. Yet, community building goes far beyond the confines of social media. As our report has shown, 45% expect to be playing more social gaming moving forward, a clear indication that games can be a communal, rewarding experience. People develop communities around on-demand content, podcasts, educational opportunities, and so much more.

All generations expect to increase time spent on social media in the next 2 years

Proportion of people who expect to spend more time socialising online

Gen Z

73%



Millennial

74%

Gen X

73%

Baby Boomer

76%

Mobile activities respondents expect to spend time on in the next 2 years

Socialising through social media apps

Overall	**74%**
Bangladesh	75%
Indonesia	80%
Malaysia	72%
Pakistan	71%
The Philippines	80%
Singapore	54%
Thailand	77%
Vietnam	80%

Spending time in the virtual world

Overall	**34%**
Bangladesh	38%
Indonesia	32%
Malaysia	33%
Pakistan	33%
The Philippines	39%
Singapore	28%
Thailand	45%
Vietnam	23%

Online social gaming

Overall	**45%**
Bangladesh	43%
Indonesia	44%
Malaysia	42%
Pakistan	39%
The Philippines	46%
Singapore	32%
Thailand	62%
Vietnam	54%

None of these

Overall	**6%**
Bangladesh	6%
Indonesia	4%
Malaysia	8%
Pakistan	4%
The Philippines	2%
Singapore	17%
Thailand	3%
Vietnam	2%

Alternative online investments – e.g. NFTs

Overall	**46%**
Bangladesh	45%
Indonesia	44%
Malaysia	43%
Pakistan	43%
The Philippines	56%
Singapore	32%
Thailand	57%
Vietnam	52%

Streaming on-demand content

Overall	**37%**
Bangladesh	34%
Indonesia	37%
Malaysia	39%
Pakistan	28%
The Philippines	43%
Singapore	39%
Thailand	49%
Vietnam	32%

With the mobile phone, play is now also about self-improvement. Mobile technology provides a means for people to improve their lives. Whether it's formal learning via apps or informal knowledge absorption through podcasts, our respondents are putting their downtime to good use.

Looking to the future of play, while there is growing interest in the virtual reality, there are still many unanswered questions, especially about the metaverse and its role as an immersive gaming platform. Our research shows that consumers are on the fence about the technology, with just over half (52%) saying that they would be interested in watching live sports events in the metaverse. There is a similar ambivalence about other uses of the metaverse: 36% say they would be interested to attend concerts in the metaverse, while only 33% indicated interest in playing virtual reality games in the metaverse. So far, the metaverse has failed to spark significant interest.

Top areas of the metaverse respondents would like to explore

Watch live sport events in the metaverse/VR

Overall	**52%**
Bangladesh	64%
Indonesia	52%
Malaysia	52%
Pakistan	51%
The Philippines	52%
Singapore	33%
Thailand	62%
Vietnam	48%

Play virtual reality games in the metaverse

Overal	**33%**
Bangladesh	31%
Indonesia	36%
Malaysia	28%
Pakistan	24%
The Philippines	37%
Singapore	24%
Thailand	41%
Vietnam	39%

Attend music concerts the metaverse and/or immersive/virtual reality

Overall	**36%**
Bangladesh	39%
Indonesia	34%
Malaysia	42%
Pakistan	27%
The Philippines	46%
Singapore	36%
Thailand	37%
Vietnam	30%

Conclusion

From physical relationships to virtual communities, mobile technology is changing social landscapes across Asia. These changes have been hardwired into daily activities and interactions, with digital adoption showing no sign of slowing down.

This sweeping trend, which is clear through all three instalments of Digital Lives Decoded 2022, sends a strong message about the higher expectations people have today for mobile operators, the networks, and services they provide.

As we continue to explore how future generations of technology can optimise both physical and virtual worlds, here are three priorities our industry should bring with us into 2023:

1) Faster, stable and robust networks as well as innovative services to keep pace with people's future needs

Our research show that people expect to spend even more time social gaming in the next 2 years, and with Esports becoming an entertainment phenomenon regionally, demand for high performance connectivity will grow.

As people's needs evolve, so too must networks continuously improve to provide stable and fast connectivity. Telcos need to work with 'best in breed' partners to provide smooth gaming and streaming experiences while also ensuring high performance

networks able to handle high traffic, offer low latency and provide innovative services, for example, gaming-optimised connectivity and platform services such as metaverse. Strong collaboration between government and industry is also required, along with an investment environment that promotes long-term predictability and a regulatory framework that drives effective competition, innovation, and market growth.

2) Securing the internet for all

While people are broadly positive about the time they spend using their mobile and the immense opportunities available in a digital world, there are certain risks that accompany the surge in time spent online. Harmful content, issues around unethical online advertising and online scams are just some of the reasons behind the need to shape up how our industry can equip people, old and young, with critical tools to navigate the online world safely and become more creative, productive, and innovative netizens.

If online gaming is to become the next public square online, then it is vital to secure this space for all. We can leverage lessons learnt from social media, etc and get ahead of the curve to securing online gaming, the metaverse and beyond. Such a forward-looking attitude will help us proactively tackle new forms of online threats and hopefully mitigate them from becoming serious online harms. This is a joint responsibility on policy makers, connectivity, and digital service providers as well as the people using these services themselves. It calls for a concerted effort across the board.

3) Include everyone

While technological advancements have enabled new wave of innovations and new, creative ways of learning and playing virtually, much less has been done to reduce the global access gap. Those equipped with network access and internet-capable devices will be able to take part in the digital leap and reap the rewards. The unconnected, however, will lose ground and be further isolated digitally from this 'new world order' in the digital sphere.

Overall, though, our research shows the positive effects of mobile technology on all aspects of lives in Asia. Previous reports showed the power of devices and mobile broadband in helping people get ahead with their careers and this latest report underlines the power of technology to help people turn their downtime into uptime possibilities.

Market snapshots

Bangladesh

- Respondents in Bangladesh are the most avid users of their mobiles for downtime activities, with 62% reporting a significant increase in the time they spend on their mobile for entertainment, compared to a 47% average.
- Bangladeshis are among the most likely (61%) to feel more connected to people they know post-pandemic, second only to Thailand.
- 33% of Bangladeshis feel their mobile gaming habits and spending have a significant positive impact on other areas of their personal life (24% average).
- They are, however, least likely to spend money on in-game items. 29% do not spend at all, vs. 24% overall.
- Social gaming has taken hold among older generations in Bangladesh. 84% of older generations in Bangladesh watch eSports or video game streamers – more than any other generation and the largest proportion from Baby Boomers across all markets. They are also most likely to play mobile games occasionally (75%).

Indonesia

- Alongside those in the Philippines and Vietnam, Indonesians expect to increase the amount of time they spend socialising via social media apps (80% vs. 74% overall), with Baby Boomers particularly keen to do so (90%).
- More women than men in Indonesia are willing to pay to watch eSports or their favourite streamers (64% female vs. 58% male), a contrast to most other markets where this trend is reversed.
- Alongside Filipinos, 89% of Indonesians are most likely to feel that learning on educational apps positively impacts quality of life.
- Indonesians are also among the most likely in the region to listen to podcasts for at least one hour a day, with Millennials and Baby Boomers equally likely to do so.
- Respondents in Indonesia are least likely (39% vs. 51% average) to feel their gaming habits and spend positively impact their personal life with 15% feel it impacts negatively (11% average).

Malaysia

- Malaysian youth spend more time on TikTok and Instagram than their regional peers (63% and 83% vs. 53% and 72%).
- Social gaming is increasing in popularity among Malaysians. One in five engage more today than before the pandemic. Two in five Malaysians expect to increase the time they spend online social gaming.
- Malaysians expect to increase their time socialising and investing online in the coming years.
- Four in five Malaysians say that using educational apps on their mobile has positively impacted their quality of life.
- Gamers across the region are most likely to spend between US$10-100 per year on in-game items, with 34% spending within this range. Malaysians and Thais are most likely to do so, with 40% of spending in this category.

Pakistan

- Baby Boomers in Pakistan are eager adopters of social media apps. They are the most likely to increase time spent socialising via social media apps over the next two years (93%), compared to a 74% average.
- Respondents in Pakistan are least likely to spend time streaming on-demand, with one in five not streaming (vs. 14% average). They are also the least likely to increase this over the next two years.
- People in Pakistan are the least active listeners of podcasts via their mobile devices. Only 34% listen for more than one hour a day, compared to 45% overall, with slightly more females than males engaging (37% vs. 32%).
- Nearly three-quarters of people in Pakistan play mobile games at least once a day. However, Pakistan has the most significant number of respondents who do not play mobile games (29%).
- Pakistani respondents express the least interest in playing virtual reality games in the metaverse (24% versus 33% overall).

Philippines

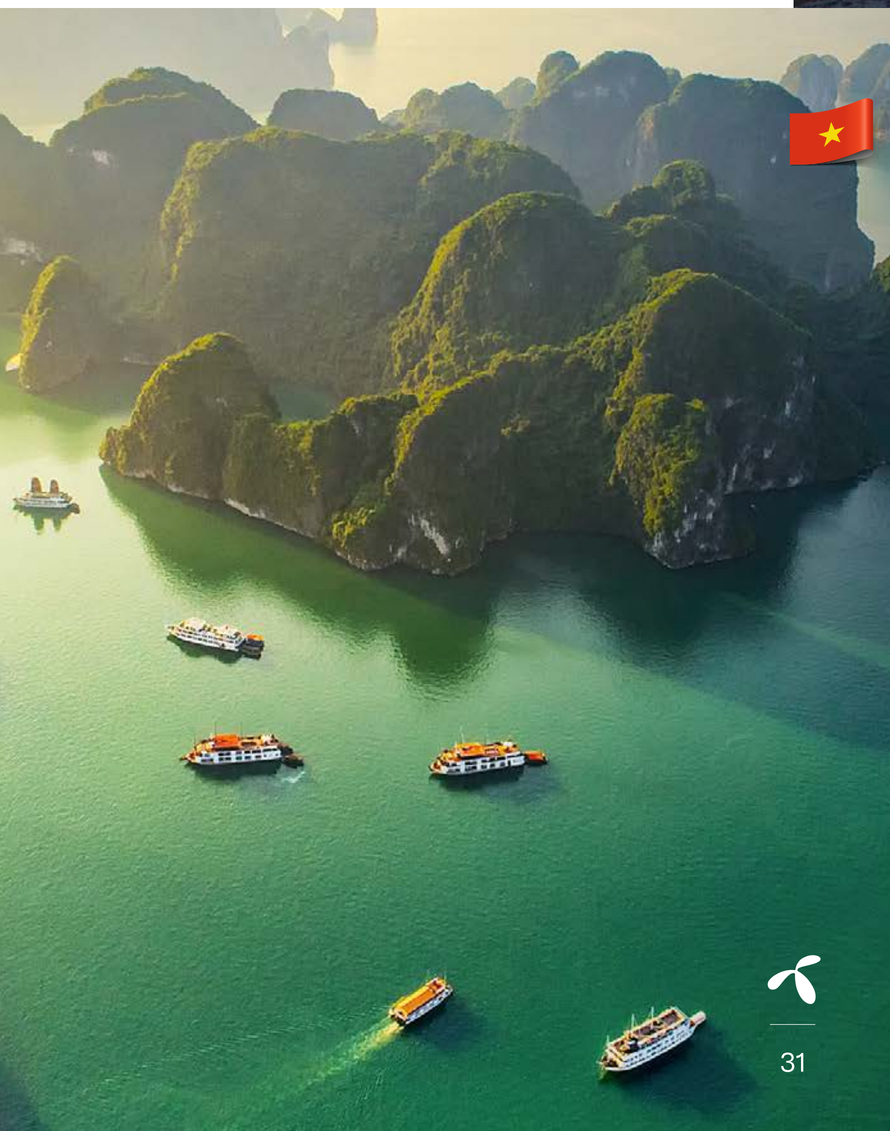
- Filipinos are heavy users of social media – almost two-thirds engage in social media via mobile devices for over 3 hours a day (49% average). 23% engage for over seven hours daily (12% average), while 90% of Baby Boomers expect to increase the time they socialise via social media apps in the next two years.
- Respondents in the Philippines are the most likely (77%) to find themselves socialising more virtually than in-person because of the pandemic, compared to a 66% average.
- 35% of Filipinos now engage in online social gaming, following Thailand (37%) but higher than the overall average (25%).
- Respondents in the Philippines are most likely (90%) to say that learning on educational apps or websites improves their quality of life, compared to an 82% average.
- 76% of male respondents in the Philippines are part of the eSports and video game streamers audience, compared to an average of 68%.

Singapore

- Singaporeans are least likely to find themselves socialising more virtually than in-person since the pandemic (49% vs. 66% average). Moreover, socialising via mobile devices has left one-third of Singaporeans feeling less connected to people they know compared to 23% on average.
- Respondents in Singapore spend the least time engaging in social media via mobile devices, with 34% saying that they spend less than one hour or none at all (vs. 20% overall).
- In line with this, respondents in Singapore are less likely to increase their social media usage in the next two years than their regional peers (54% vs. 74% average).
- While 29% of Singaporeans do not play mobile games, one of the highest among the markets surveyed, Baby Boomers are as likely as Gen Z's to play occasionally and equally likely as Gen Z's to spend between US$10-$100 on in-game spend.
- Respondents in Singapore are most keen to explore virtual reality games in the metaverse, (41% vs. a 33% average).

Thailand

- The pandemic has led to a sharp increase in the time Thai people spend socialising online, which is seen as a positive development by the people we asked. 66% regularly meet new people online (47% average), while 63% say their mobile helps them feel more connected to people they know (55% overall).
- Respondents in Thailand are most likely to increase time spent investing in alternative online investments (57%), streaming on-demand content (49%), and spending time in the virtual world (45%).
- Gaming Nation: 44% of Thais play mobile games daily, a higher percentage than other markets (average 31%).
- In line with this, people in Thailand are most likely to increase time spent online social gaming in the next two years (62%), compared to 45% overall.
- Thais are also the most likely to spend more than an hour a day listening to podcasts (66% vs. 45% average), skewed to Millennials and Gen X populations.



Vietnam

- Vietnamese respondents are among the most likely (80%) to increase the amount of time spent socialising through social media apps in the next two years, with 94% of Baby Boomers expecting to do so.
- 77 % of Vietnamese respondents play mobile games at least 2-3 times a week, joint highest with Thailand (overall average of 60%).
- Respondents in Vietnam are most likely to watch eSports or video game streamers (76% vs. 64% average), with males and females equally likely to do so and a staggering 94% of Gen Z.
- Vietnamese gamers show great willingness to pay for in-game items, with 30% spending over US$100 a year (18% average). Vietnamese in-game expenditure is higher than the regional average, with a preference for spending on power-ups (62% vs. 40% average), cosmetics, and time savers (both 46% vs. 33% average).
- Respondents in Vietnam are most likely to believe that their gaming habits and spending positively impact their quality of life (64% vs. 51% average).

Telenor Asia Digital Lives Decoded