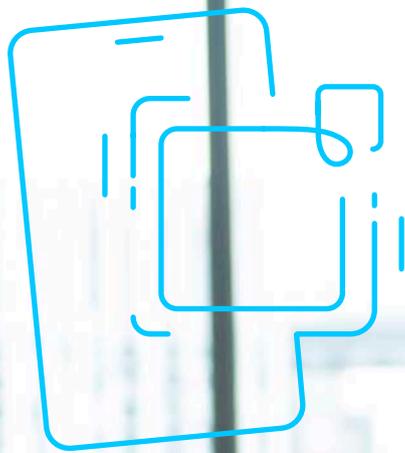


TELENOR ASIA DIGITAL LIVES DECODED

Part Two: Work



Decoding changing attitudes
towards mobile connectivity in
South and Southeast Asia

October 2022





Mobile technology holds immense potential in helping businesses realise greater resilience and growth by empowering employees and unlocking new revenue streams

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Foreword

In this period of economic and geopolitical uncertainty, what role can mobile technologies play to help companies attract and retain talent, be productive and build resilience for the next wave of transformation and adaptation? The ability of mobile technology – underpinned by resilient broadband networks and connectivity infrastructure – to mitigate disruption in terms of where work happens and enabling employees to continue to be productive, have been much discussed. But what has been less talked about, and is a simmering issue of growing importance to all stakeholders, is the aspect of trust.

Indeed, part two of our study of over 8,000 people in eight markets in South and Southeast Asia, shows that there is a high level of appreciation of the positive impact that mobile technology and connectivity have had in supercharging work performance and careers at an individual level, and its crucial role in driving the success of businesses, particularly with COVID-related restrictions in the past three years. The role of the mobile is especially crucial in many developing markets where fixed broadband remains unavailable or unaffordable for many.

Mobile technologies have also created new options for working and generating income. There are many stories of people building viable businesses through their mobile phones, from Thai housewives conducting successful home-based businesses through online marketing¹ to mango sellers in Bangladesh turning to e-commerce to find new distribution channels during crises².

However, privacy and security concerns, and a distrust of the technology, are standing in the way of employees and their organisations in extracting the fullest potential from mobile technology at work. This coupled with an uptick in

employee surveillance could push the issue of trust to the forefront for organisations – creating further challenges in talent management and retention.

Already, respondents are calling for a reimagining of the workplace and how internal communications, learning and development, and HR systems and processes can be redesigned and enhanced with the use of mobile technology to overcome trust-related barriers, to not only boost performance and productivity, but also improve relationships and satisfaction at work.

At the same time, with more mission-critical work migrating to digital and mobile platforms and the risk of cyberattack rising in tandem, the issue of trust also needs to be addressed from a network stability and security perspective. Remote and hybrid work is reliant on secure and resilient networks that enable employees to connect not just with one another and their customers, but also with the tech systems that power enterprises today. A cyberattack could have a crippling effect on any organisation, but just as importantly, delivering high-quality and stable mobile connectivity for all employees, anytime, anywhere is also an imperative in ensuring uninterrupted operations.

We are at a pivotal moment as organisations emerge from the pandemic and aim to build greater resilience, while ensuring that employees can thrive in the new world of work. As this second part of our study has shown, mobile technology holds immense potential in helping businesses realise this by empowering employees and unlocking new revenue streams. We hope that the insights on some of the gaps and opportunities around mobile connectivity can serve to guide leaders and stakeholders in charting the way forward in the digital-first economy.

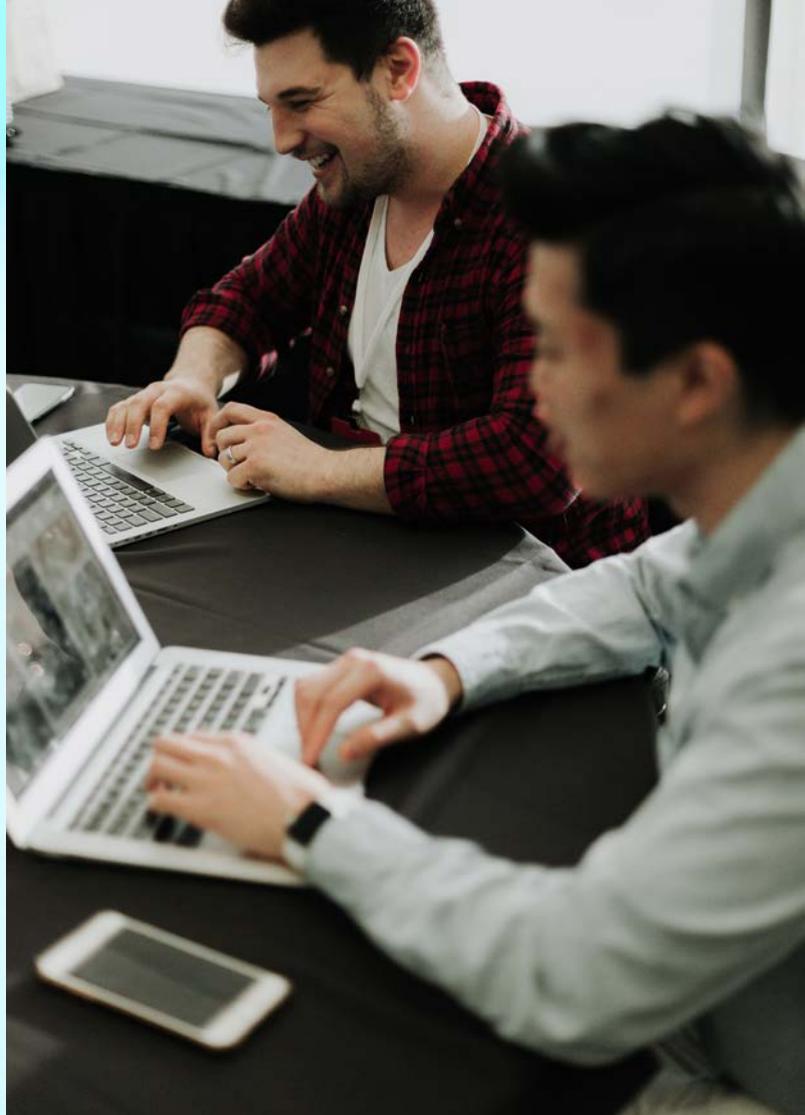


Jørgen C. Arentz Rostrup
Head of Telenor Asia

¹How a housewife from Chon Buri revived a disappearing heritage dish and built a successful online business in the process: <https://dtacblog.co/en/how-a-housewife-from-chon-buri-revived-a-disappearing-heritage-dish-and-built-a-successful-online-business-in-the-process/>
²<https://www.youtube.com/watch?v=znSzY7Ibu00>



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. This second instalment looks at the impact mobile technology and connectivity has on people's working lives.

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).

At work, these respondents hold positions ranging from entry-level to C-suite executives and come from a range of industries including agriculture; construction and engineering; consumer goods; education; financial services; food and beverage; government and public service; healthcare; IT, technology and telecommunications; manufacturing; professional services; and retail, among others.

Survey respondents were granted anonymity and Telenor's involvement was not disclosed.



Chapter One: Tapping into technology at work

The work landscape today is very different from the one we knew at the end of 2019. Mobile devices, virtual meetings and digital collaboration tools are enabling employees to spend at least some of their week working away from the office.

These tools and technologies, underpinned by secure, stable, high bandwidth connectivity, have played their part in mitigating some of the worst effects of the pandemic-induced recession seen in many parts of the world. Indeed, the International Telecommunications Union (ITU) estimated in 2020 that countries with the best connectivity would be able to offset large parts of the economic impact compared to those countries that had little or no access to high-speed infrastructure.³

³Economic Impact of Covid-19 on Digital Infrastructure: https://www.itu.int/dms_pub/itu-cl/opb/pref/D-PREF-EF_COV_ECO_IMPACT-2020-PDF-E.pdf

Supercharging performance and productivity

This is evident in our research: more than eight out of 10 respondents feel their performance and productivity had somewhat or significantly improved as a result of using mobile technology. Of which, more than half believe personal productivity had increased by 20 percent or more from pre-pandemic levels.

Respondents from the Philippines, Thailand and Indonesia are most likely to feel this way, and the highest proportion of those surveyed in the Philippines attributed personal productivity increases of more than 50 percent to the use of mobile devices and technology.



The outlier, among the markets surveyed, is Singapore where just under a third think mobile usage had contributed to a significant increase in personal productivity. A similar proportion of respondents in Singapore (23 percent) also feel that mobile technology has had no impact on productivity, and close to six percent believe productivity has worsened – these figures are the highest among markets surveyed. This could be due to the high fibre penetration rate and maturity of this market, diminishing the added value of the mobile device for personal productivity.

Increase in productivity due to mobile device and technology

Increase by 20 percent or more

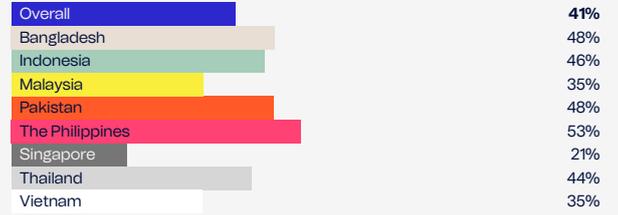


Increase by over 50 percent

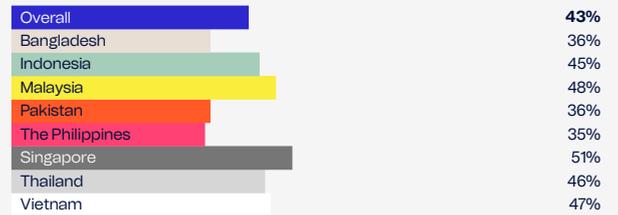


Impact of mobile device and technology on productivity

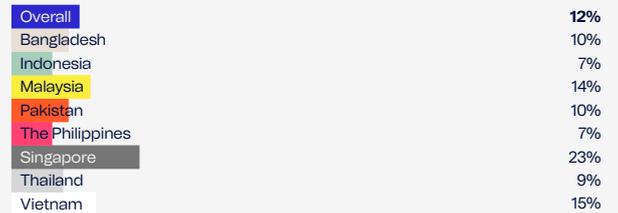
Significantly improved



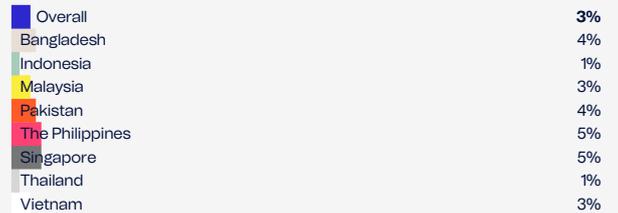
Somewhat improved



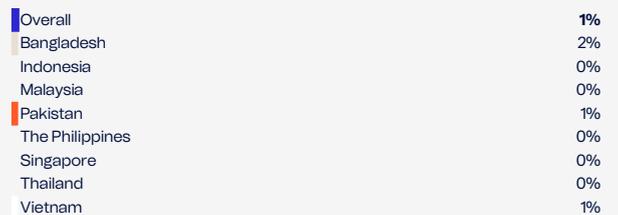
No change



Somewhat worsened



Worsened



As we look at the differences between age groups, Gen Z respondents are most likely to appreciate the impact of digital tools, devices and connectivity have had on significant improvements in their performance at work.

However, a twist on this finding is that this same group is least likely to report significant improvements in productivity. This trend is also seen among entry-level and junior-level employees, with a lower proportion of these respondents indicating significant productivity improvements.

Significantly improves performance



Gen Z

48%



Millennial

44%



Gen X

43%



Baby Boomer

34%

Significantly improves productivity



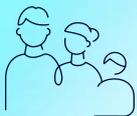
Gen Z

38%



Millennial

44%



Gen X

40%



Baby Boomer

39%

Significantly improves productivity



Senior Level
- Director /
C-Suite

45%



Mid-Level -
Manager /
Senior Manager

43%



Junior
Level -
Assistant

38%



Graduate /
Entry Level

38%



This perhaps reflects the needs of younger employees to be physically present in the office so they are visible and can build their personal networks or seek guidance and support from more senior colleagues.⁴ As a result, and despite the perceptions of younger workers being permanently connected to their smartphones, this age group is least likely to want a fully remote working experience.⁵

⁴Younger employees fear being left behind by remote work: <https://www.axios.com/2021/07/13/gen-z-remote-work>
⁵Why younger workers can't shake presenteeism: <https://www.bbc.com/worklife/article/20220819-why-young-workers-miss-out-on-flexible-hours>

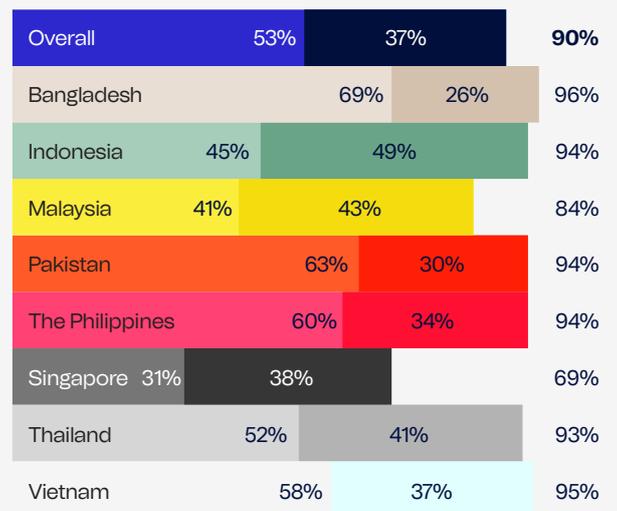


Supercharging careers, especially for those at the top and women

In addition to performance and productivity, nine out of 10 respondents also thought their careers and skills development have been positively impacted by the use of mobile technology.

Respondents in Bangladesh, Pakistan and the Philippines experienced the greatest impact of mobile technology on their career and skills development, with over six in 10 seeing significant improvement, perhaps as a result of opportunities to learn-on-the-go via mobile devices. City dwellers are also more likely to cite improvements.

Positive impact of mobile device and technology on career and skills development

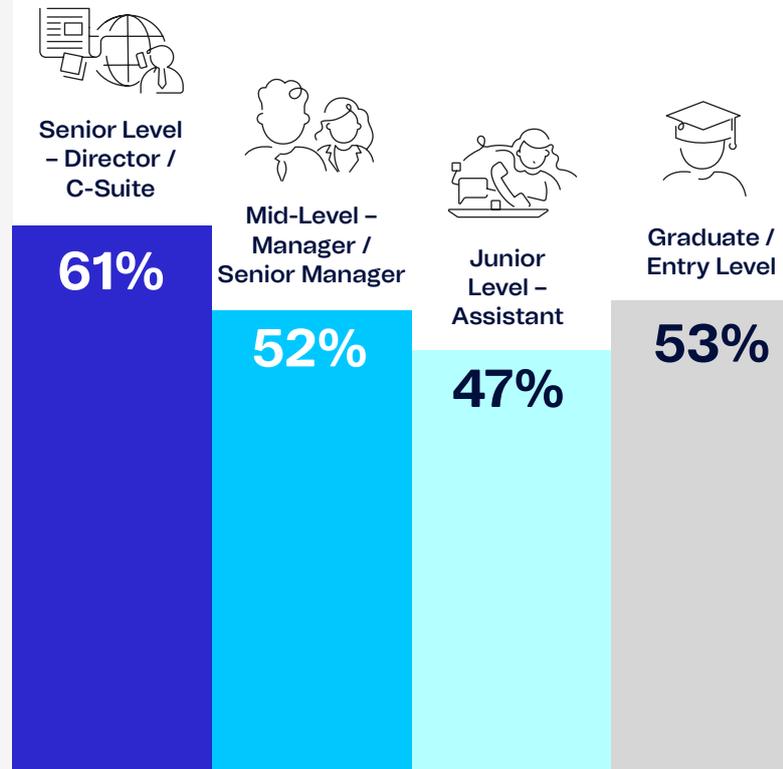


■ Significantly improves ■ Improves

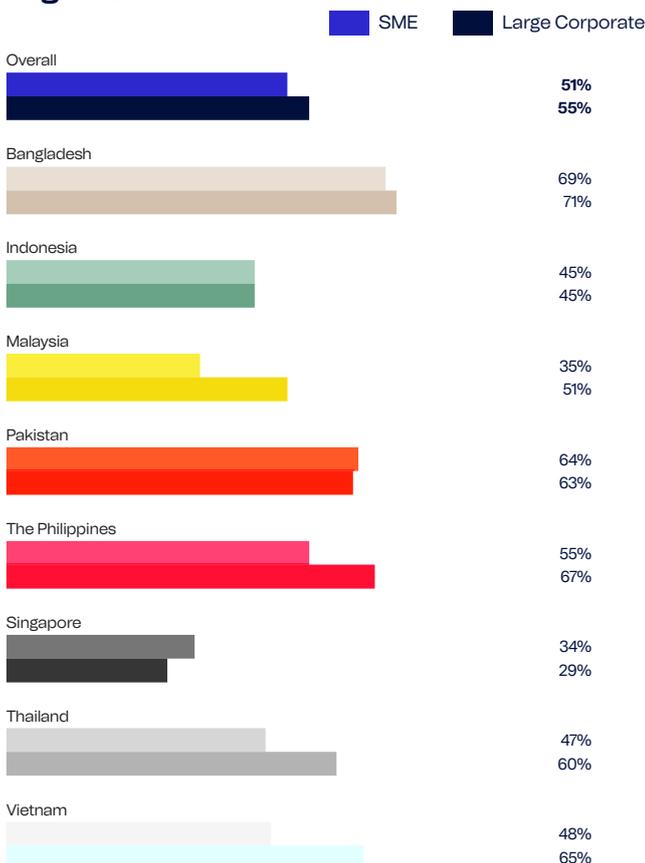


Seniority at work also seems to have an impact on how people perceive mobile technologies, with nearly two-thirds of respondents in senior level and C-suite positions expressing that the mobile device has had a significant impact on their career and skills development.

Significantly improves career and skills development



Significant improvement to career and skills development by size of organisation



The size of a company in some countries can also affect the level of impact of mobile devices have on people’s careers and skills. In Malaysia, for example, those working in large corporate businesses are significantly more likely to experience the positive benefits than their counterparts working in Small and Medium Enterprises (SMEs). A similar pattern was also seen in the Philippines, Thailand and Vietnam. This could reflect the generally larger budgets of bigger businesses to fund both the technology and learning and development initiatives. It also shows the need for SMEs to adopt digital tools and build up the digital skills of employees if they are to go further in unlocking their potential.



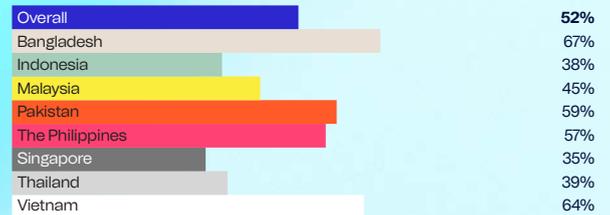
It is also worth noting that in some countries, the trend of mobile devices having a more positive impact on women compared to their male counterparts continues beyond daily life and tasks into the workplace as well. In Thailand for example, more women than men felt mobile devices had significantly improved their career and skills development at work. Sizeable gaps between women and men were also noted in Bangladesh, Indonesia and Pakistan. The same trends were seen in our first study, with more women than men in these markets believing that their mobile devices significantly improve quality of life by connecting them with better access to information and equal opportunities.

Significant improvement to career and skills development by gender

Female



Male



The trend of mobile devices having a more positive impact on women compared to their male counterparts continues beyond daily life and tasks into the workplace as well



Supercharging livelihoods

Mobile technologies have created opportunities to open new income streams and access new job and career opportunities.

Over half of our respondents feel mobile devices have enabled them to open new income streams over the last five years while half feel that mobile devices have increased their access to new job and career opportunities. However, there were differences between those who live in the city and rural areas, with more urbanites seeing the benefits of mobile technology in connecting them to new income and career opportunities.

Ability to open new income streams



Employed full-time

49%



Employed part time

53%



Self-employed

58%

Ability to access new job and career opportunities



Employed full-time

48%



Employed part time

55%



Self-employed

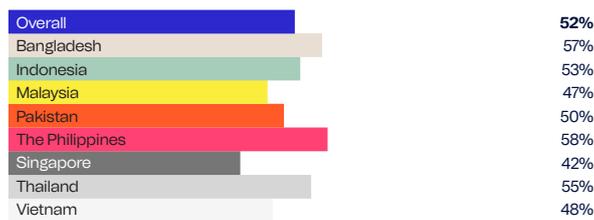
54%



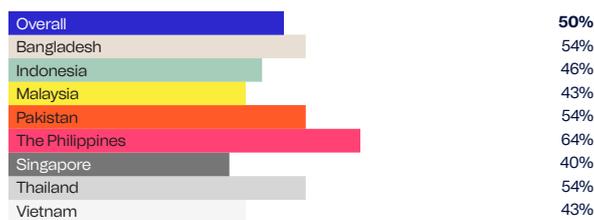
In line with the anecdotal stories about individuals who have built businesses or tapped into the region's gig economy using their mobile devices, the highest proportion of self-employed respondents highlight the ability to open new income streams as a key feature of how mobile technology has enhanced their work lives.



Ability to open new income streams



Ability to access new job and career opportunities



Across the region, respondents in the Philippines, Bangladesh and Thailand were most positive on new income streams afforded by mobile devices, while those in Singapore were the least positive. Respondents in the Philippines were most likely to value the opportunities to access new job and career opportunities via their mobile device over the last five years, with those in Singapore being most sceptical.



Echoing the first instalment of the report where more women believe mobile usage significantly improves their lives, the potential of mobile technology in enriching their lives by connecting them to new income streams was also evident. With the exception of Indonesia, Thailand and Singapore, more women in the rest of the markets believe their mobile devices provide them with the ability to open new income streams.

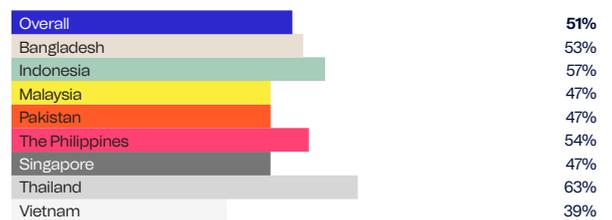
Women also see greater benefits from their mobile in accessing new job and career opportunities, with significantly more women than men indicating this in Vietnam (22-percentage points higher), Pakistan and Malaysia (12-percentage points higher for both).

Mobile connectivity opens new income streams

Female

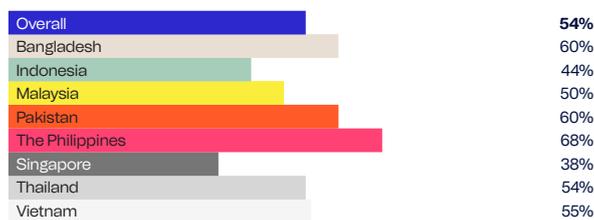


Male

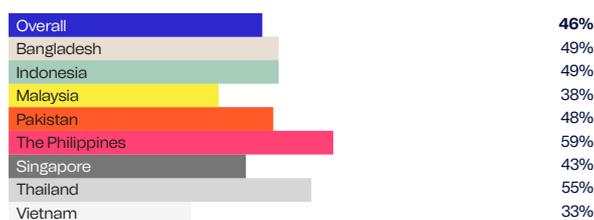


Connecting to new job and career opportunities

Female



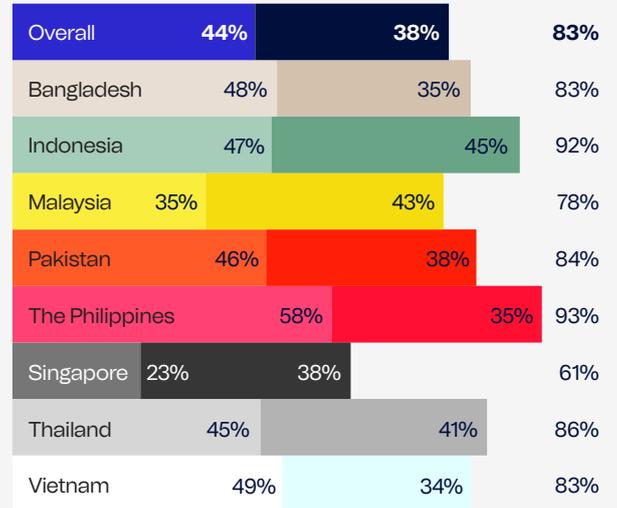
Male



Mobile technology has not just boosted work and income-generating opportunities; it has also had a positive impact on the quality of life more generally. Nearly half of respondents feel that being able to use a mobile device for work significantly improved their quality of life – a counterintuitive finding when there has been so much narrative about the negative impact of an ‘always-on’ work culture. To underline this point, just five percent of respondents out of the more than 8,000 who participated in our survey feel mobile usage reduced their quality of life.

While the majority still believe that using their mobile devices for work improves quality of life, in Singapore, only two in 10 feel the improvement is significant – the lowest among all markets surveyed. A notable 11 percent of Singaporean respondents say that this has reduced or significantly reduced their quality of life, compared to an overall average of five percent across markets the surveyed.

Impact of using mobile devices for work on quality of life



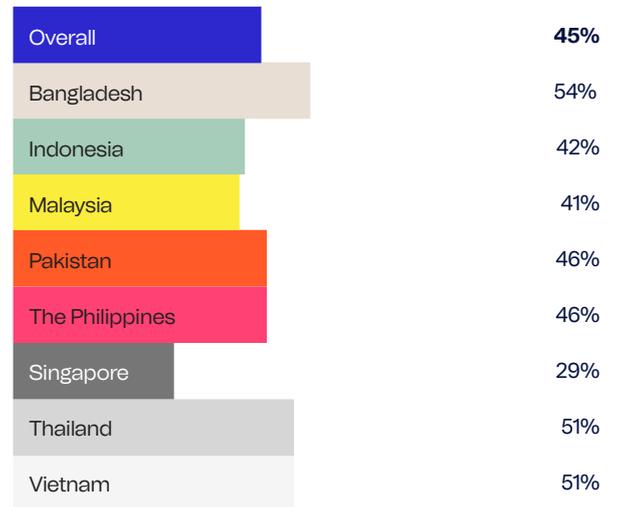
■ Significantly improves ■ Improves



It comes as no surprise, therefore, that a significant number of people believe they will use their mobile device significantly more in the next six to 12 months for work. Bangladesh, Vietnam and Thailand lead the pack with most people with higher expectations of mobile device usage for work. Singapore is again an outlier, with just under three in 10 expecting to significantly increase mobile usage, possibly given the relatively maturity and already high mobile use in this market.

Further, with those living in cities seeing greater benefits from using mobile technology for work as compared to their peers in rural areas, more city dwellers also expect to significantly increase mobile usage for work.

Significantly increase mobile usage for work in next six to 12 months



Significantly increase mobile usage for work



City

48%



Rural

37%

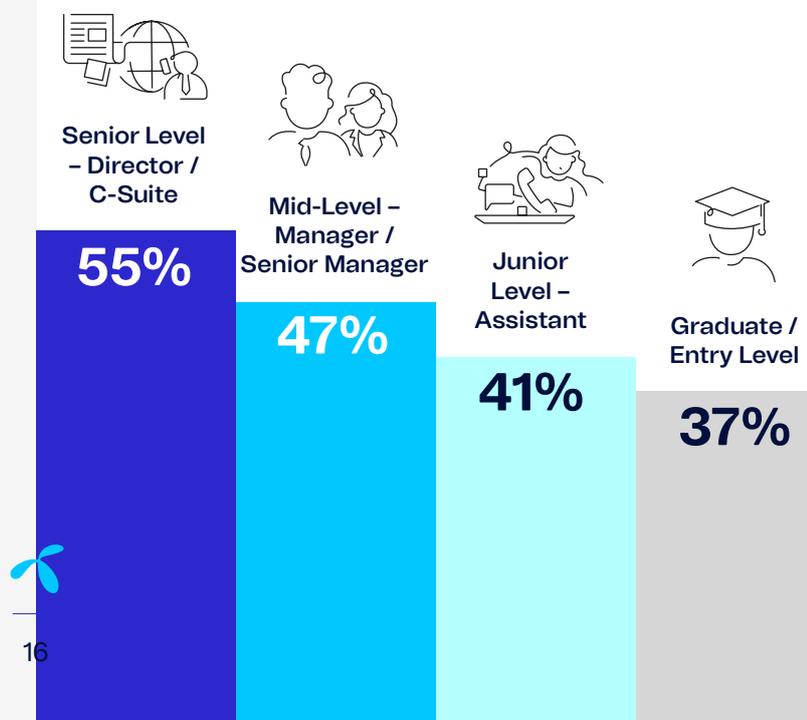


Bangladesh, Vietnam and Thailand lead the pack with the highest proportion of people expecting significantly higher mobile device usage for work



Significantly increase mobile usage for work in next six to 12 months

In addition, differences across seniority levels can also be seen. Over half of C-suite and senior level respondents see themselves significantly increasing mobile usage for work, while only less than four in 10 entry-level employees indicate the same. This points to a potential divergence in access to superior technologies available to more senior staff in the region, and the benefits C-suite executives say they have gained in productivity levels, career and skills development – motivators for senior employees to further boost their use of mobile technology.



Chapter Two: Clicking into a new work culture



As we emerge from the pandemic, it is clear that our working lives will not return to the way they were. Gone is the need to work nine-to-five in an office in city centres, replaced by a much more flexible approach to work.

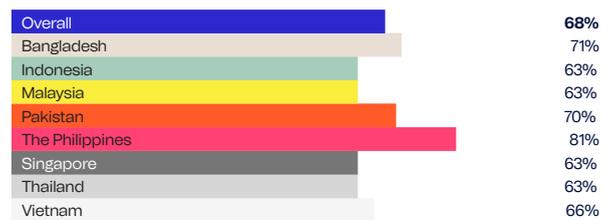
Greater mobile connectivity – and the faster decision-making it can bring – is helping some organisations gain a competitive edge.

Mobile technology underpins improvements at work, but rural respondents less convinced

This is recognised by the vast majority of respondents, with over two-thirds identifying greater connectivity as the key feature that has enabled them to enhance their work and work capabilities. A similar number also recognised that mobile devices facilitated better and faster team and customer communication.

Key features of mobile that have enhanced work

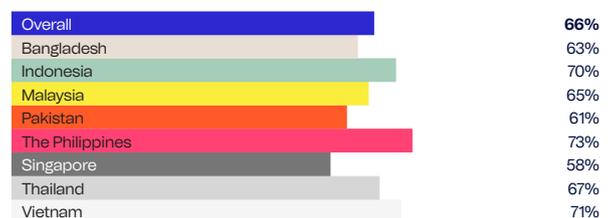
Greater connectivity



Ability to work remotely



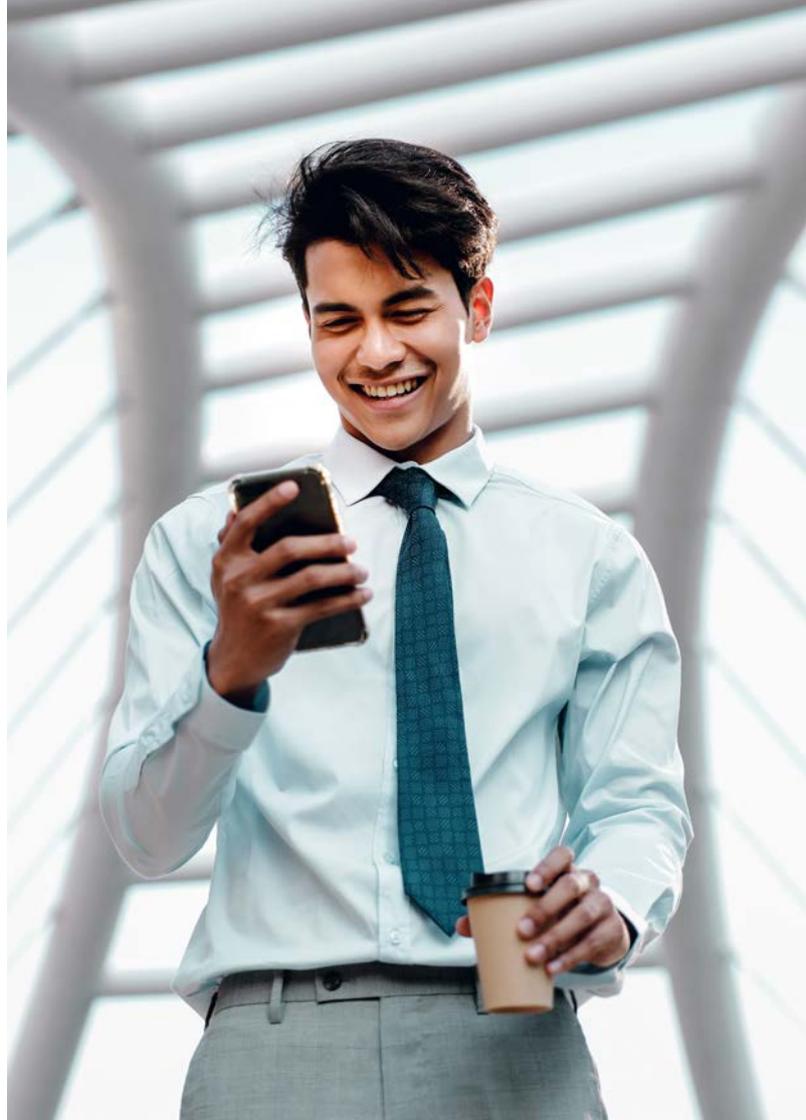
Faster team and customer communication



Respondents in cities tend to be more positive about the impact of mobile devices on their working lives, with connectivity and the ability to work remotely being key reasons given.

Key features of mobile that have enhanced work

| | | |
|-----------------------------------------------|--------------------|---------------------|
| Greater connectivity | City 70% | Rural 63% |
| Ability to work remotely | City 70% | Rural 60% |
| Faster team and customer communication | City 67% | Rural 59% |



Hybrid working and the work-from-home debate

The ability to work remotely is clearly a key outcome of the impact of mobile technology on work. This is a benefit appreciated by more than two-thirds of our respondents, particularly in Indonesia (76%) and the Philippines (75%). This is least appreciated in Singapore – 56 percent versus a 68 percent average across all markets.

As business speeds up, organisations are juggling how to successfully adopt hybrid or fully remote working practices.



Across industries, there were differences in how positively respondents view the key features of mobile devices and technology in enhancing their work and workplace capabilities. There was a significant gap between those working in media and communications services and consumer goods in how they saw mobile technology enhancing their ability to work remotely and promoting faster team and customer communication. This could likely be attributed to the level of flexibility that the workers in the two industries have to work from home.



Percentage of respondents who selected feature (highest and lowest)



Greater connectivity

| | |
|-----------------------------------|-----|
| Government and public service | 77% |
| NGOs and charitable organisations | 76% |
| Agriculture | 74% |
| Food and beverage | 74% |
| Mining | 74% |
| Education | 61% |
| Energy | 60% |
| Media and communications services | 42% |



Ability to work remotely

| | |
|-----------------------------------|-----|
| Media and communications services | 81% |
| NGOs and charitable organisations | 71% |
| Manufacturing | 70% |
| Consumer goods | 69% |
| Food and beverage | 63% |
| Real estate | 63% |
| Tourism and hospitality | 63% |
| Education | 61% |
| Mining | 58% |



Faster team and customer communication

| | |
|-----------------------------------|-----|
| Media and communications services | 77% |
| Transportation | 72% |
| Financial services | 72% |
| Construction and engineering | 71% |
| Healthcare | 71% |
| Energy | 58% |
| NGOs and charitable organisations | 58% |
| Consumer goods | 57% |
| Mining | 55% |



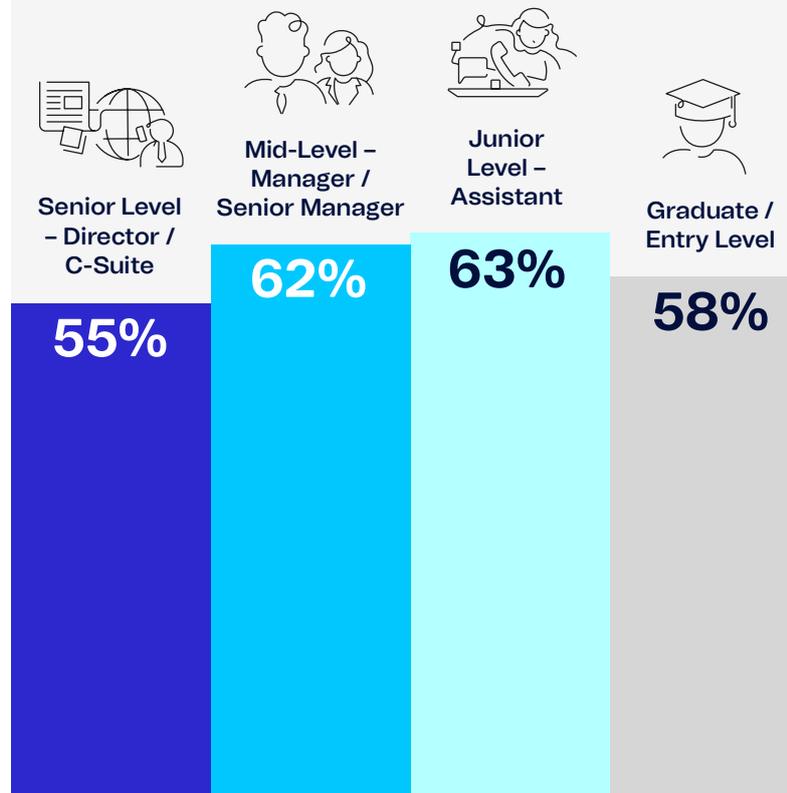
Trust issues on the rise

It is not all plain sailing though. There have been reports of an uptick in the instances of companies using tools for employee surveillance. Some of the world's largest financial services firms⁶ are already using technology to monitor their employees. This is likely to have a negative impact on employee morale and will affect both talent retention and acquisition.

This sentiment is echoed among six in 10 respondents, citing privacy and security reasons for not being able to extract the fullest potential from mobile technology. Privacy and security are also more of a barrier for entry to mid-level employees than C-suite executives. A sizeable minority (40 percent), with more working in large corporates than SMEs (43 percent versus 38 percent), also distrust the technology. These could all be signs of concern about how their managers might be planning to use this technology.

⁶<https://www.businessinsider.com/jpmorgan-chase-employees-describe-fear-mass-workplace-data-surveillance-wadu-2022-5>

Privacy and security



Greater mobile connectivity – and the faster decision-making it can bring – is helping some organisations gain a competitive edge



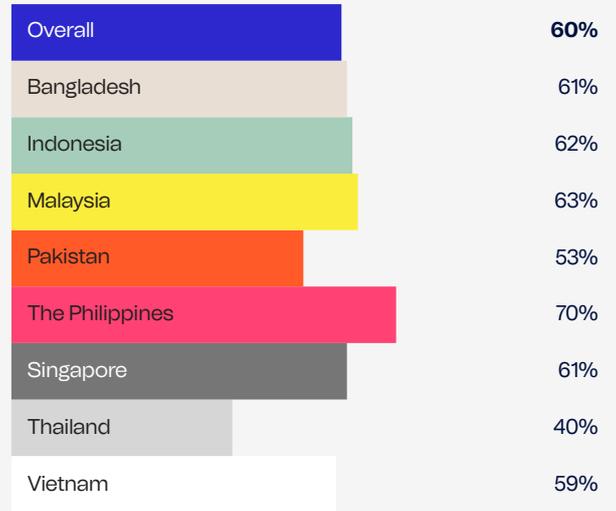
Privacy and security concerns are greatest for our respondents from the Philippines, while trust in the technology is of greatest concern in Bangladesh. This may be attributed to confidence in digital skills and ability to navigate trust-related issues surrounding mobile usage, with six in 10 respondents in Bangladesh – the highest among markets surveyed – also highlighting lack of skills and knowledge as a barrier to more effectively using mobile technology (see following section).

A slightly higher proportion of city dwellers (60%) view privacy and security to be a barrier as compared to those living in villages and rural areas (56%).

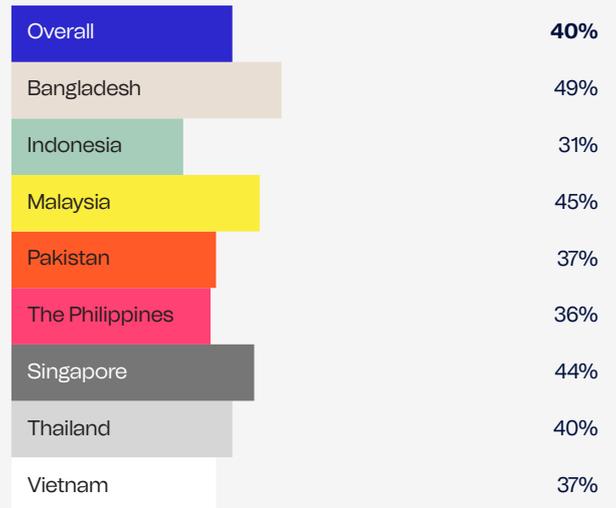


Most significant barriers to fully utilising mobile technology and/or its features to its fullest potential at work

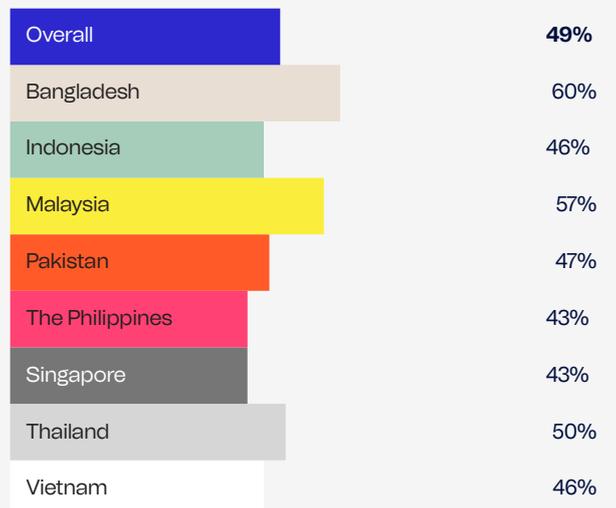
Privacy and security



Lack of trust in technology



Lack of skills and knowledge

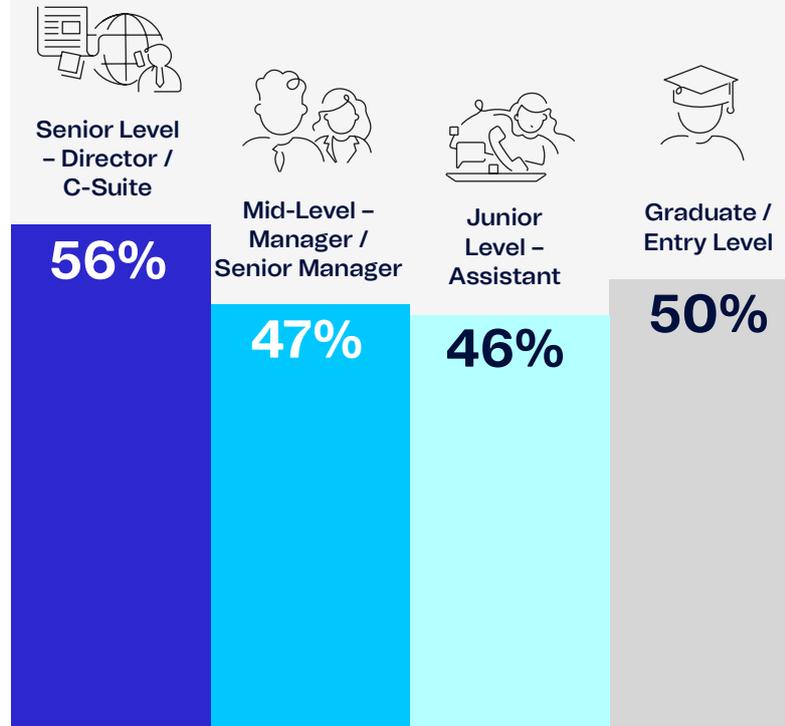


Tackling the digital skills shortage

It is also worth noting that nearly half of our respondents felt that they did not have the skills and knowledge to take advantage of the benefits afforded by mobile technology. This issue is particularly acute in Bangladesh.

Older members of our survey were more likely to feel they did not have the right knowledge; while C-Suite executives were also more likely than junior counterparts to feel they were under-equipped to leverage the power of mobile technology fully.

Lack of skills and knowledge



Perhaps indicative of the industry's pace of change, the highest proportion of respondents in media and communications services (70 percent) believe that lack of skills and knowledge are barriers to fully utilising mobile technology at work. This compares to the overall average of 49 percent and appears to be less of a concern for those working in financial services and transportation (44 percent for both).

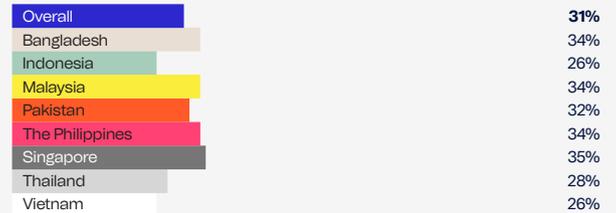


It is not, however, just technology that can be a barrier; workplace practices and resistance to change also have a part to play in the successful use of mobile technology. Just under a third of respondents feel that resistance to changing practices was a key barrier, while a similar grouping say that unhelpful working practices were the major obstacle.

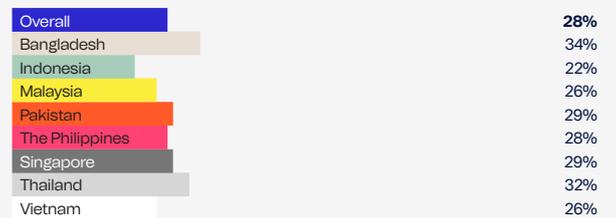
These findings were generally consistent across markets, business size, age groups and the seniority of the employee reflecting the fact that simply deploying mobile technology is not enough; it needs to be accompanied with training and updated working policies that better support today's digital-first working environment. These will help to ensure employees feel supported and that the business is able to harness the benefits safely and securely.

Significant barriers to fully utilising mobile technology for work

Resistance to changing practices and habits



Unhelpful workplace policies



Resistance to changing practices and habits



Senior Level –
Director / C-Suite

32%



Mid-Level – Manager
/ Senior Manager

33%



Junior Level
– Assistant

31%



Graduate /
Entry Level

27%



Senior Level –
Director / C-Suite

33%



Mid-Level – Manager
/ Senior Manager

29%



Junior Level
– Assistant

26%



Graduate /
Entry Level

25%



Chapter Three: Reimagining the workplace of the future

There is little doubt that working remotely is seen as a positive development by most employees who have enjoyed the greater flexibility it brings. However, we are only in the very earliest days of these new working practices and there are challenges that need to be addressed early on.

“For example, there is the challenge of so-called presence bias. Research is showing that employees who often work remotely can start to feel isolated simply as a result of not having access to the same information as their in-office peers. While virtual collaboration tools are rapidly improving, they are still no adequate replacement for those informal water cooler chats.

The increased flexibility to work from home can paradoxically lead to a reduction in equality and inclusion at the workplace. Those who, for various reasons, choose to work more remotely risk being shut out from important information and being sidelined in their careers.

Finally, there is also risk of the connection between employees and employers being undermined by hybrid working. More than two years on from the start of the pandemic, some employees have still never met their colleagues. How can businesses hope to create the connections that bind people to each other when they only ever meet over Zoom?”

**Jarle Moss Hildrum,
Senior Research Scientist, Telenor Research**



Communication and HR systems and processes need a rethink

These challenges are borne out in our survey with more than two-thirds believing internal team communication (69%) is a key area in which their employer could improve the use and application of mobile technology. A close second was learning and development (62 percent), while the third most-often cited area for improvement was HR systems and processes (54 percent).

Such challenges are more acute in large corporate organisations. Respondents from those businesses are more likely to think that their employer needed to improve HR systems and processes while nearly three-quarters of all C-suite executives feel internal team communications could be enhanced with better use of mobile technology.

Areas for improvement of use and application of mobile device and technology

Internal communication



Employee learning and development



HR systems and processes



Senior Level –
Director / C-Suite



Mid-Level –
Manager / Senior
Manager



Junior Level –
Assistant



Graduate /
Entry Level

Internal communication



Employee learning and development



HR systems and processes

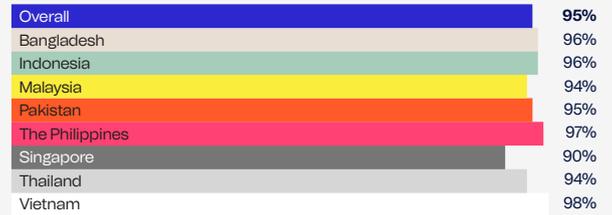


These concerns feed into respondents' worries about being able to keep up with new technologies. While almost everyone felt that being able to use these technologies effectively was key to giving them an edge in the workplace, almost half are concerned about their ability to utilise them effectively.

This worry is most noticeable among Gen Zs with half of them concerned about the pace of change; in contrast to their older peers with just over a third of Baby Boomers voicing the same concerns. This perhaps reflects the length of time Gen Zs have left in the workforce, and the likely huge changes they will see over the next few decades in how technologies for work will continue to evolve. Interestingly, C-suite executives (53 percent) are more concerned than other employees (39 percent average) about their skills becoming outdated.

Mobile technology skills will give employees a competitive edge in the workplace in the future

Potential for competitive edge



Concerned about keeping pace



Concerned about keeping pace



Gen Z

49%



Millennial

44%



Gen X

34%



Baby Boomer

40%

Concerned about keeping pace



Senior Level
- Director /
C-Suite

53%



Mid-Level -
Manager /
Senior Manager

38%



Junior
Level -
Assistant

38%



Graduate /
Entry Level

44%

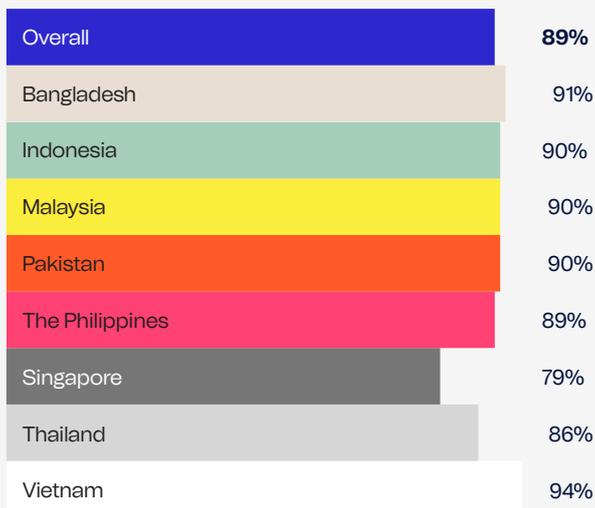
Reflecting the pace of change, the media and communications services industry stood out with the highest proportion of respondents (68 percent) indicating concerns about their skills becoming outdated. This compares to an overall response of 42 percent, and 23 percent of those in mining, holding similar sentiments.

Training needs to be dialled up

These concerns are borne out in the need for better training on skills related to mobile technology. Nine out of 10 respondents (89 percent) want to see more learning opportunities provided by their employers. Perhaps because they are less concerned about the pace of change, Baby Boomers are somewhat less keen on training than their younger counterparts, but even within this group, the majority see the value of more learning opportunities.

The demand for more training on mobile technology skills was seen across the markets surveyed, with Singapore being somewhat of an outlier, although even in that market, close to eight in 10 still say they would like more training from their employers.

More training



More mobile skills training wanted



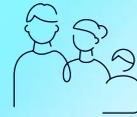
Gen Z

90%



Millennial

90%



Gen X

87%

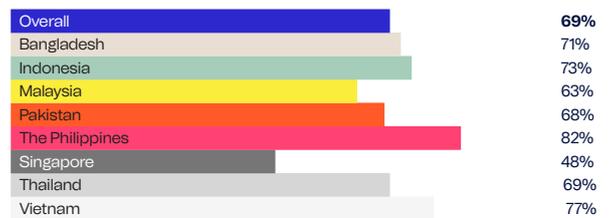


Baby Boomer

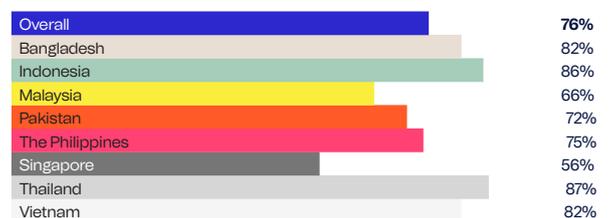
80%

Despite these worries, respondents recognise that mobile technology is here to stay with more than two-thirds voicing their opinion that being connected was 'very important' to the success of the organisation for which they work. Surprisingly given the concerns we touched on, more than three-quarters also believe their company is using mobile technology to its fullest potential.

Mobile connectivity very important to success of business

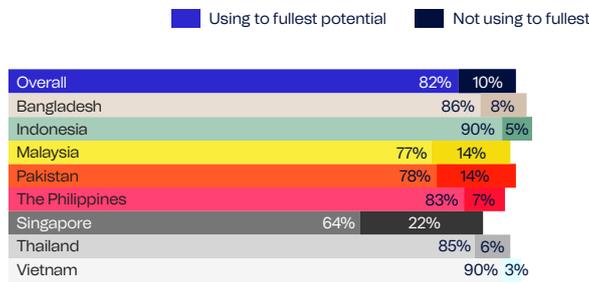


Company fully utilising potential



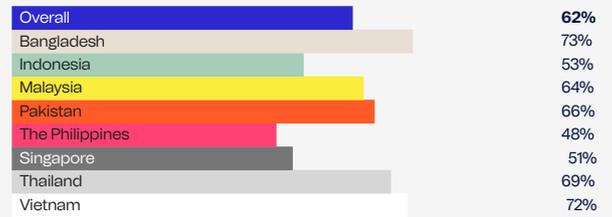
This positivity is also mirrored as people reflect on their own use of technology. More than eight in 10 believe they are using their mobile devices to their fullest extent at work, while just 10 percent believe they are not exploiting features effectively. Confidence about mobile usage was most keenly felt in Indonesia and Vietnam, and stand in contrast to Singapore where respondents felt least confident.

Utilisation of mobile for work



This general feeling of confidence does not permeate into all areas. Whilst we have just seen that people generally believe their organisations are using the technology they have effectively, nearly two-thirds of people feel there are untapped revenue opportunities which could be exploited with a better developed mobile technology infrastructure. These opportunities are most keenly felt in Bangladesh, Vietnam and Thailand, and chief technology officers in those markets should take a moment to consider what else they can do to drive revenue through mobile devices and technology.

Missing out on revenue opportunities



Missing out on revenue opportunities

IT, technology and telecommunications

69%

Consumer goods

67%

Retail

69%

Energy

67%

Utilities

67%

Transportation

52%

Tourism and hospitality

52%

NGOs and charitable organisations

47%

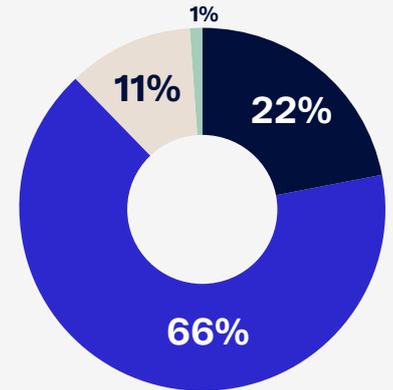
In terms of industries, respondents working in IT, technology and telecommunications; and retail, were most likely to believe that their companies were missing out on revenue opportunities because of underdeveloped use and application of mobile phone and technology capability.



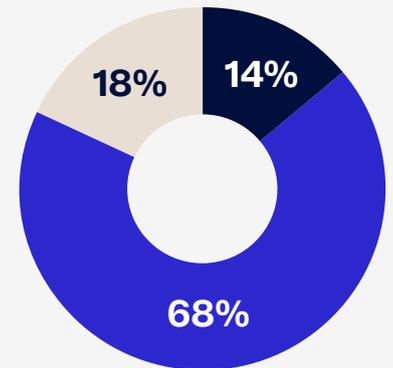
This view of missed opportunity is also underlined by how people rate their digital skills. Two thirds rated themselves as 'standard / average' while nearly a fifth felt their skills were 'basic.' This masks some interesting contrasts between the groups, noting in particular that closer to one in five of those working in large corporates were more likely to rate their digital skills as 'advanced' compared to just over one in ten of SMEs. As we have already seen in this report, this points to a need for SMEs to adopt digital tools and build up employees digital skills if they are to further unlock their potential.

Level of digital competency and skills

SMEs



Large Corporates



■ Basic ■ Standard ■ Advanced ■ No Skills

Basic

| Gen Z | Millennial | Gen X | Baby Boomer |
|-------|------------|-------|-------------|
| 21% | 18% | 16% | 23% |

Standard

| Gen Z | Millennial | Gen X | Baby Boomer |
|-------|------------|-------|-------------|
| 62% | 68% | 70% | 65% |

Advanced

| Gen Z | Millennial | Gen X | Baby Boomer |
|-------|------------|-------|-------------|
| 17% | 13% | 13% | 11% |

Generational differences in digital skills levels can be observed, with younger respondents – perhaps unsurprisingly given that these are digital natives – more likely to rate their skills as advanced.

A larger proportion of respondents working in real estate (22 percent) and IT, technology and telecommunications (20 percent) rate their digital skills as advanced. Respondents in media and communications rated their proficiency comparatively lower – only seven percent say they have advanced skills, while 31 percent hold basic skills. This fits with earlier observations about those working in this sector being most concerned about being outdated and believing that lack of skills and knowledge are barriers to them fully utilising mobile technology at work.



Conclusion

Mobile technologies and the hybrid working practices they support are here to stay for the long term. The way we work today is powered by seamless and resilient broadband connectivity, of which as we have seen in this study, mobile plays a key role in delivering a range of unique benefits and opportunities to employees and organisations alike.

Mobile devices are enabling workers to find more flexibility in their lives and they are reaping many other rewards as well, including improved quality of life. Unexpected benefits have accrued too, with many in our survey finding new ways to earn a living by tapping into the potential of mobile technology and connectivity.

It is not just employees who have benefitted; businesses too have seen improvements in performance and productivity with the majority of respondents believing that there are more business opportunities available for organisations in a digital-first world. Here, we outline how the industry, in partnership with multiple stakeholders, can respond to some of the key issues emerging from the findings of this report:

Mobile technologies and the hybrid working practices they support are here to stay for the long term



1. Build digital skills - as the key to unlocking digital opportunity in APAC

The findings of this study indicate a need for employers to shift the way they look at building people's skills. A sizeable number of our respondents do not feel they are able to keep up with the pace of change of mobile technology and as a consequence their digital skills are lagging.

Indeed, a recent study by regional economists found that by 2025 the average worker will need to acquire seven new digital skills⁷ to keep pace with technological change. The same study found that two out of three businesses are uncomfortable to adopt new technologies because they do not believe their workforce has the required skills to utilise this technology.

This goes to show how investment in areas such as training and future skill development for employees at all levels, and those looking to join the workforce, can help to elevate productivity, performance and capability. The benefits for corporates to work with government partners, academic partners and like-minded industry partners to build people's competitive skills and digital expertise are becoming clearer. There is significant opportunity at stake if we do not get this right.

2. Ensure digital inclusion for growth and resilience

This research points to mobile connectivity as an enabler of productivity, progress, flexibility and economic opportunity. Yet, we continue to see gaps in how this technology is used between urban and rural populations, large companies and SMEs, between industries and even between C-suite executives and their junior counterparts.

We need to keep working on bridging these gaps and level up the base. One key aspect to increasing digital usage is to make content and services available in a

context, language, and form that is relevant for people. Another is by ensuring that technology is affordable, that people can access and use smart devices or that people have the right tools and knowledge to come online. This requires investment, and attention. By tackling this today we are investing to bring all along, while anticipating future connectivity demands.

3. Trust at the heart of workplace digital transformation

Mobile technologies have enabled us to take work out of the workplace to profound impact on both individuals and businesses. While COVID has demonstrated and accelerated the value of mobile at work, users project yet greater use of mobile for work. But, a number of barriers hold back the full potential. Key to further enhancing the value of mobile for work is building trust and confidence in mobile technologies and in the companies that handle data and content online.

Mobile technologies are but one part of a multidimensional internet architecture and trust must extend across the entire stack as well as across the ecosystem of service providers. Such a broad task requires a concerted effort from both private and public sector to tackle constantly evolving and emerging risks in a dynamic threat landscape. This includes developing common standards, systems to ensure integrity of identity and to guard against malicious content, cooperation across industry and also between government and industry. Market forces should be allowed to drive development and advancement in network functionality and security, this requires enabling a business environment that encourages innovation in infrastructure deployment and operation. Finally, mobile users are very much on the frontlines here and it is also important for industry and government to educate and empower people to ensure secure use of mobile technologies.

⁷<https://alphabeta.com/our-research/unlocking-apacs-digital-potential-changing-digital-skill-needs-and-policy-approaches/>



Market snapshots



Bangladesh

- Respondents in Bangladesh are most likely (69% versus 53% overall) to feel that mobile devices and technology significantly improve their career skills and development.
- Given these benefits, they also expect the fastest growth in mobile use for work in the next six to 12 months, with 54% expecting to significantly increase usage, compared to an average of 45%.
- Despite this, respondents in Bangladesh are most likely to cite lack of skills and knowledge (60% versus 49% overall) and lack of trust in technology (49% versus 40% overall) as barriers to utilising their phone to its full potential for work.
- Compared to their regional peers, respondents in Bangladesh are more likely to believe that mobile technology opens new income streams (57% versus 52% overall).
- Those in Bangladesh (73%) are most likely to believe that their company is currently missing out on revenue opportunities because of underdeveloped use of mobile device and technology capability, versus a 62% average.



Indonesia

- Alongside those in Thailand, Indonesian respondents (86%) are most likely to feel that their company is fully utilising mobile devices and mobile technology in the workplace, compared to a 76% average.
- Versus peers, Gen X respondents in Indonesia are most likely (91%) to feel that their company is fully utilising potential use and application of mobile phone and technological capability, compared to the overall average of 74%.
- Respondents here are also the most likely, alongside those in Philippines (93%), to say that mobile devices use for work have improved the quality of their life (92% versus 83% overall).
- Indonesian respondents, and their Vietnamese peers, feel most confident that they are using their mobile device and mobile technologies to their fullest potential, with 90% believing this, compared to an 82% average.
- More men than women in Indonesia say that mobile connectivity opens new income streams (57% men versus 50% women) and provides access to new job and career opportunities (49% men versus 44% women), a contrast to most of the markets where the trend is reversed.





Malaysia

- Alongside their neighbouring Singaporeans, Malaysian respondents are least likely to feel that mobile technology provides opportunities to significantly improve career and skills development (45% compared to a 52% average).
- In addition, those working in large corporates (51%) in Malaysia are more likely to believe that mobile technology significantly improve their career and skills development than those working in SMEs (35%).
- They are also among the least likely to feel that mobile technologies create opportunities for new income generating streams (47% versus a 52% average) and new job and career opportunities (43% versus a 50% average).
- Alongside those in Bangladesh, Malaysian respondents (57%) are most likely to cite lack of skills and knowledge as barriers to utilising mobile technologies to their full potential in the workplace, compared to 49% overall.
- Second only to those in Bangladesh, they are also most likely to feel that a lack of trust in technology is preventing them from using mobile technology to the fullest potential at work.



Pakistan

- 69% of women in Pakistan feel that mobile devices and mobile technology significantly improves their career and skills development, the highest proportion across all markets and compared to a 54% average.
- Half of the respondents in Pakistan are concerned in keeping pace with digital skills (50%), only after Bangladesh (54%), compared to the overall average of 42%.
- They are among the least concerned about privacy and security as a barrier to utilising mobile technology to the fullest potential (53% versus a 60% average).
- Alongside those in Bangladesh (29%), respondents in Pakistan (24%) are most likely to rate their level of digital skills as basic.
- As a result, they are most likely to express concerns over keeping pace with digital skills (50%), second only to those in Bangladesh (54%) and compared to a 42% average.





Philippines

- Filipinos report significant enhancements in productivity at work stemming from mobile technology – 69% say productivity has improved by over 20%, and 35% feel this has increased by 50% or more, significantly higher than the average.
- Respondents here are most likely to feel that mobile phones have enhanced their ability to open new income streams (58% versus 52% average) and access new job and career opportunities (64% versus 50% average) – with the highest proportion of female respondents from the Philippines saying this.
- They also value mobile connectivity, with 82% saying that mobile connectivity is very important to business success (versus 69% average).
- Respondents in the Philippines are confident about their company's use of mobile devices and mobile technology capabilities, with only 48%, compared to 62% overall, thinking that their employers are missing out on revenue opportunities because of underdeveloped use or application.



Singapore

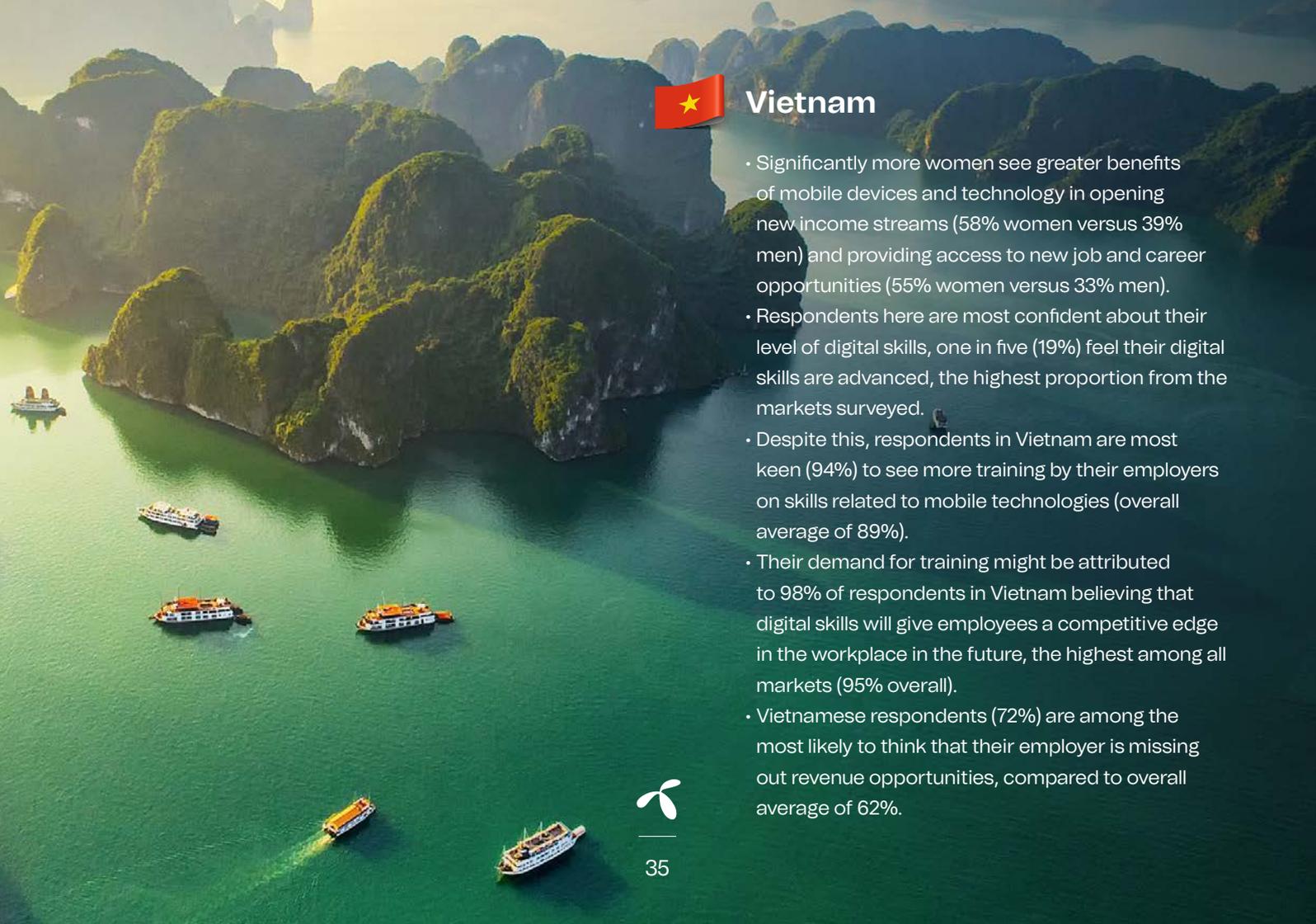
- Singaporeans are least likely to feel that mobile devices have increased their personal productivity, with only 35% reporting an increase of 20% or more and only 8% reporting an increase of over 50%, significantly lower than average.
- Respondents here are also most likely to feel that they are not fully utilising mobile technologies to their fullest potential in relation to their work (22% versus 10% overall).
- Singaporeans do not see mobile connectivity as important as their regional peers, with only 48% of respondents in Singapore, compared to 69% overall, saying this is very important to the success of their company.
- While the majority still believe that using mobile devices for work improves quality of life, in Singapore, only 23% feel the improvement is significant (versus 44% overall). A notable 11% of respondents here say this has reduced or significantly reduced quality of life, compared to an average of 5%.
- Only 29% of Singaporean respondents expect to significantly increase mobile usage for work in next six to 12 months, the least among all markets and considerably lower than the 45% average.





Thailand

- A notably larger proportion of women (61%) than men (39%) in Thailand feel their career and skills development is significantly improved by their mobile device, compared to an overall average of 54% of women and 52% of men.
- C-suite executives in Thailand (44%) are least likely to report significant benefits in career and skills development stemming from mobile technology (61% C-suite overall).
- Thai respondents are least concerned about keeping pace (25%) with mobile technology skills, compared to overall average of 42%.
- They are also most likely (87%) to say that their company is fully utilising the potential of mobile phones and technologies (versus 76% average).
- They are the least likely (40%) to cite privacy and security concerns as barriers to utilising mobile technology to the full potential (versus 60% average).
- Thai respondents are among the most positive about new income streams afforded by mobile devices, with 55% indicating this as compared to the overall 52%.



Vietnam

- Significantly more women see greater benefits of mobile devices and technology in opening new income streams (58% women versus 39% men) and providing access to new job and career opportunities (55% women versus 33% men).
- Respondents here are most confident about their level of digital skills, one in five (19%) feel their digital skills are advanced, the highest proportion from the markets surveyed.
- Despite this, respondents in Vietnam are most keen (94%) to see more training by their employers on skills related to mobile technologies (overall average of 89%).
- Their demand for training might be attributed to 98% of respondents in Vietnam believing that digital skills will give employees a competitive edge in the workplace in the future, the highest among all markets (95% overall).
- Vietnamese respondents (72%) are among the most likely to think that their employer is missing out revenue opportunities, compared to overall average of 62%.



