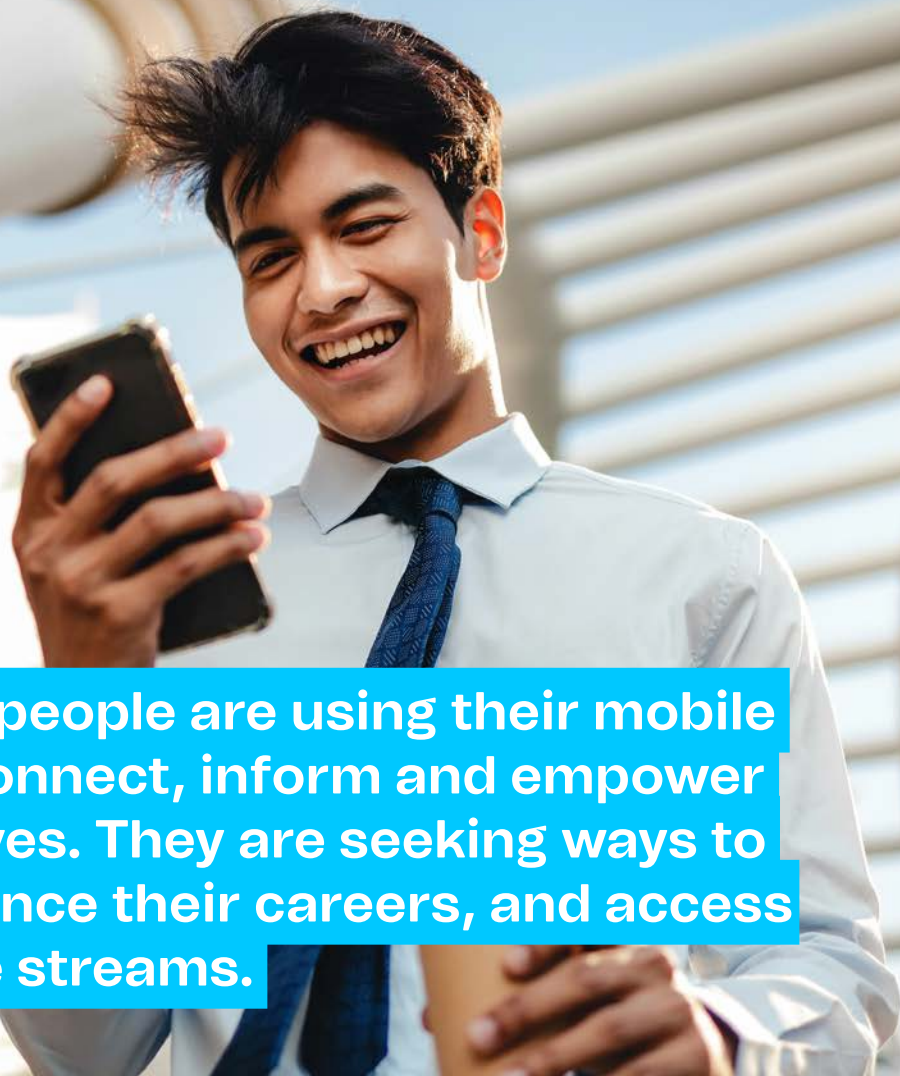# TELENOR ASIA
DIGITAL LIVES DECODED
2023

Across Asia people are using their mobile devices to connect, inform and empower their daily lives. They are seeking ways to upskill, enhance their careers, and access new revenue streams.

Foreword

A majority of the 8,000 people we surveyed in 2022 said using a smartphone strongly improves their daily life, benefitting social lives and careers as well as saving them time and providing entertainment.

In its second year, **Digital Lives Decoded** continues to chart how mobile usage and digital life evolves. To do so, **Digital Lives Decoded 2023** delves further into the areas of our online existence that stood out the most in our first study asking people what matters most to enjoying a better digital life in Asia.

In August this year, Telenor surveyed over 8,000 mobile users across **Bangladesh**, **Indonesia**, **Malaysia**, **Pakistan**, **the Philippines**, **Singapore**, **Thailand**, and **Vietnam**. We explored whether people are using their mobile to build healthy social connections online, and the factors that might inhibit this. We looked into how people are using their mobile to learn and grow professionally, in addition to opening up new opportunities and income streams. We explored whether people have the knowledge and tools to limit the risks that come with spending time online. Finally, we asked people whether they believe their mobile use can reduce our impact on the planet.

Our first study in 2022 came at a time when the world was emerging from a global pandemic and the pace of digital adoption accelerated. This year's findings build on those trends, signalling that mobile phone usage continues to gain momentum.

Greatest impact shifts from social to work

In 2023, we see a shift in where mobile usage has the greatest impact on people's lives. The 2022 study pointed largely to social factors, while this year, work emerges strongly with people seeking ways to upskill, enhance their careers, and access new revenue streams that only mobile connectivity allows. They are becoming more productive while ensuring that they can find a good work-life balance. Critically, they are not sacrificing the important interpersonal relationships that underpin all other aspects of their life.

Yet, as mobile devices become increasingly central to our lives, so does the need for all stakeholders to continue understanding the people and parts of the ecosystem most at risk. Respondents across the region highlighted a concern shared by many – the online safety of the most vulnerable people in our families such as the elderly and younger generations. We must continue working with all stakeholders to ensure that people are educated and informed about online security risks, and create a safe online environment to allow all generations to take advantage of the potential of mobile.

Drivers for better digital lives

Digital Lives Decoded 2023 offers a view of the five drivers for better digital lives in Asia – and the areas where improvements are still needed. To inspire continued progress across these five dimensions, Telenor's experts have weighed in with recommendations.

We hope you will find these insights helpful.

Enjoy the read!

Petter-Børre Furberg
Head of Telenor Asia

Research methodology

The second year of the "**Digital Lives Decoded**" study delves into five key drivers that show how mobile technology impacts the lives of people across the region in significant ways:

- **Building healthy social connections online**
- **Opening up new opportunities at work**
- **A safer online experience**
- **Learning and growing with new skills and education**
- **Reducing our impact on the planet**

This report summarises findings from a survey undertaken in August 2023 of 8,087 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 split evenly by gender, ranging from 18 years and older. Survey respondents were granted anonymity and Telenor's involvement was not disclosed.

Pakistan
1,011

Bangladesh
1,011

Thailand
1,010

Vietnam
1,010

The Philippines
1,010

Malaysia
1,013

Singapore
1,010

Indonesia
1,012

Overall number of respondents

8,087

○ Where Telenor has operations

Chapter One: Our Evolving Digital Lives

Driver 1
Building healthy social connections online

Driver 2
Opening up new opportunities at work

In the first **Digital Lives Decoded** study in 2022, the role of mobile connectivity in enhancing our daily lives was evident. Fast forward to 2023 – it is even further entrenched into our daily lives and routines.

A resounding 73% of respondents spend at least half their day using their mobile devices, with the highest usage observed in **Malaysia** (89%), **Thailand** (86%) and **the Philippines** (86%).
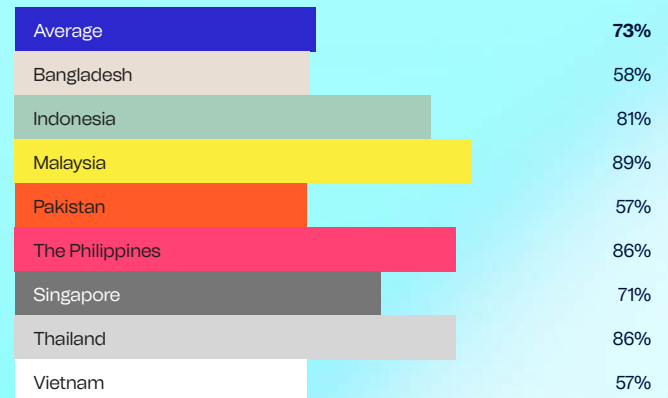
Consistent with last year's finding, more women (46%), than men (35%), spend over three quarters of their day glued to their mobiles. They are more likely than men to use their mobiles to learn new skills (97%), which they say could benefit them by creating additional income streams (66%) or by entering a new line of work (45%). Meanwhile, other daily reasons for their use include staying in touch with people, for entertainment and for their own wellbeing.

The ubiquity of the mobile becomes increasingly evident as it impacts many aspects of our lives, from our professional and personal endeavours to fostering more informed decisions around lifestyle choices and environmental considerations.

% of day spent using mobile device

More than 50%

Average	**73%**
Bangladesh	58%
Indonesia	81%
Malaysia	89%
Pakistan	57%
The Philippines	86%
Singapore	71%
Thailand	86%
Vietnam	57%

Never without mobile devices

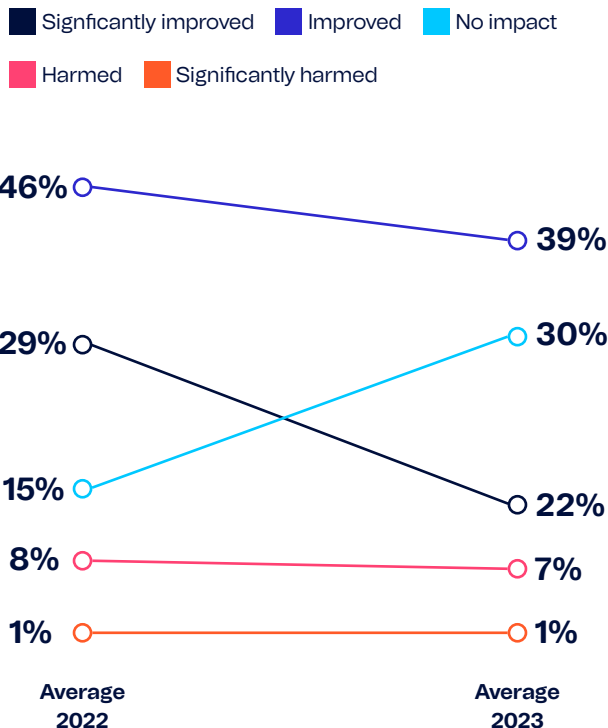| The Philippines	Thailand	Malaysia
24%	20%	19%

Building healthy social connections online

The positive influence of mobile use extends to our personal relationships as well. Similar to 2022, 2023 saw a favourable outlook on the role of mobile in relationships, with 61% of people (versus 75% in 2022) feeling that it has improved or significantly improved their relationship with family members. Likewise, 72% (versus 79% in 2022) report positive improvements in their relationship with their friends. Fewer than 10% acknowledge any detrimental impact on relationships with friends and family due to their mobile devices.

Of note is the generational gap. While 25% of those under 30 believe mobile use has significantly improved their relationship with their partner/spouse, only 10% of the plus-60 respondents felt the same.

Impact of mobile device usage on relationship with family members

■ Signficantly improved ■ Improved ■ No impact
■ Harmed ■ Significantly harmed

46% → 39%
29% → 22%
15% → 30%
8% → 7%
1% → 1%

Average 2022   **Average 2023**

Impact of mobile device usage on relationship with partner/spouse

Significantly improved

Average	21%
18-29	25%
30-39	21%
40-49	19%
50-59	17%
60+	10%
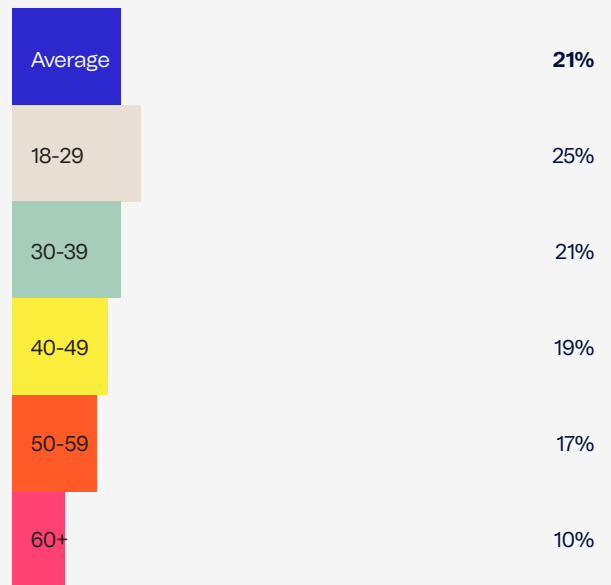
Connected, informed and empowered

Across the region, people said that mobile use connects, informs and empowers them. In **Pakistan** and **Bangladesh**, people were especially likely to report a sense of empowerment from using their mobiles, whether through accessing information, online learning, watching videos or messaging others. These positive effects are worth noting in the context of the growth in internet penetration in both countries where the internet population grew in **Bangladesh** from 5% in 2010 to 39% in 2021 and in **Pakistan** from 8% in 2010 to 21% in 2021 (The World Bank).

Feelings when accessing information via mobile device

	Empowered	Anxious	Connected	Informed	None of these
Looking at content before sleep	21%	10%	31%	32%	6%
Using search engines	30%	6%	27%	34%	2%
Reading news, sport	24%	8%	26%	40%	3%
Reading books	24%	7%	25%	35%	9%
Learning on educational apps or websites	31%	7%	25%	32%	5%

Feelings when accessing information via mobile device

	Empowered	Anxious	Connected	Informed	None of these
Shopping online	36%	8%	29%	22%	5%
Listening to music	33%	8%	33%	19%	6%
Messaging others	25%	7%	46%	20%	2%
Video calling others	24%	8%	46%	18%	4%
Social media	29%	9%	36%	24%	2%

On a regional level, respondents identified mobile activities that contributed to their sense of empowerment. These include shopping online (36%) and listening to music (33%). Additionally, messaging or video calls (46%), social media (36%) and reading news (40%) on the mobile were recognised as effective means of feeling connected and informed.

As an example of how people are using their phones to empower themselves – this year's respondents told us that their mobile use is helping them navigate the ongoing cost of living crisis. People across the region use mobile devices to compare prices (70%), find the best deal (65%) or track their spending (41%). Indonesia, once again, has the highest number of respondents who compare prices (82%) and find deals (84%), reflecting a combination of growing mobile use and its high density of young, digitally savvy population.

Positive impact of mobile devices in managing cost of living
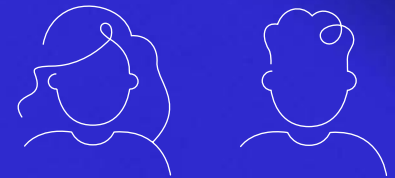
	Average	Female	Male
Compare prices	70%	70%	70%
Find deals	65%	67%	64%
Using apps which track spending	41%	44%	39%
Budgeting apps	34%	37%	32%
Monitor and optimise my energy/ water use	28%	30%	26%
Participate in second-hand online marketplace	34%	35%	34%
Shared economy services e.g. ride share, bike share	30%	30%	31%
None of the above	4%	4%	5%

People's appetite for mobile continues to grow

Looking ahead, a staggering 70% of people expect to further increase the time they spend on their mobile, with 28% saying they anticipate a significant increase in mobile use.

While this figure reflects a slight decline from the previous year, it signals a continuation of the upward trajectory observed last year. **Malaysia** and **Thailand** are again among those leading this trend, however it is most evident in **Pakistan**, where 37% foresee a significant uptick, an increase from 32% in 2022's survey.

Mobile device usage is still expected to grow over the next 1-2 years

■ Somewhat increase   ■ Significantly increase

	Somewhat increase	Significantly increase	Total
Average	42%	28%	**70%**
Bangladesh	40%	23%	63%
Indonesia	44%	25%	69%
Malaysia	43%	30%	73%
Pakistan	36%	37%	73%
The Philippines	37%	35%	72%
Singapore	41%	22%	63%
Thailand	52%	31%	83%
Vietnam	41%	20%	61%
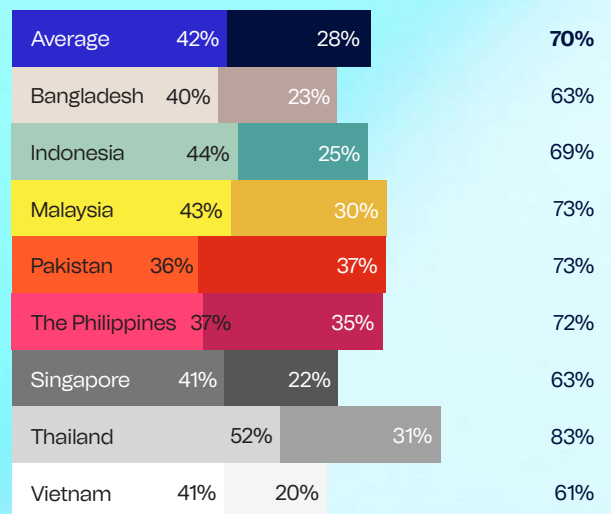
Going mobile for work and life

Work (76%) emerges this year as the primary driver increasing people's mobile use, a contrast to 2022 when social interaction took the lead. People also expect to increase the time spent on online services and/or apps (71%) while social interaction (63%) remains a big driver with many saying Facebook remains the most popular place to connect with others.

With 2023's data suggesting that work-related activities will increase people's mobile use, this opens up new opportunities for companies to take advantage of technology to optimise performance.

Biggest reason for the increase in mobile device usage

Increased use for work

Average	76%
Bangladesh	75%
Indonesia	86%
Malaysia	73%
Pakistan	73%
The Philippines	77%
Singapore	70%
Thailand	73%
Vietnam	80%
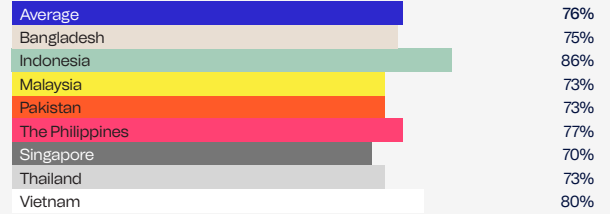
Increased use of everyday online services and/or apps

Average	71%
Bangladesh	67%
Indonesia	80%
Malaysia	71%
Pakistan	60%
The Philippines	69%
Singapore	74%
Thailand	78%
Vietnam	69%
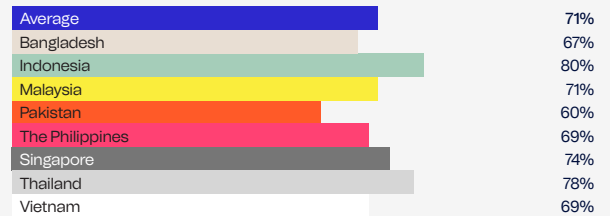
Increased use for social interaction

Average	63%
Bangladesh	43%
Indonesia	77%
Malaysia	70%
Pakistan	41%
The Philippines	71%
Singapore	70%
Thailand	67%
Vietnam	63%
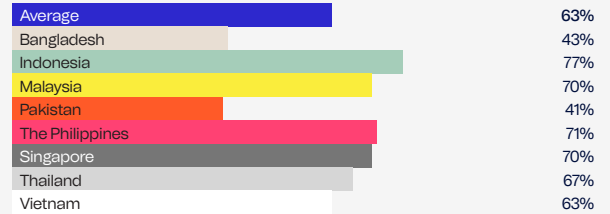
Increased use of online entertainment

Average	52%
Bangladesh	45%
Indonesia	63%
Malaysia	54%
Pakistan	35%
The Philippines	53%
Singapore	54%
Thailand	63%
Vietnam	51%
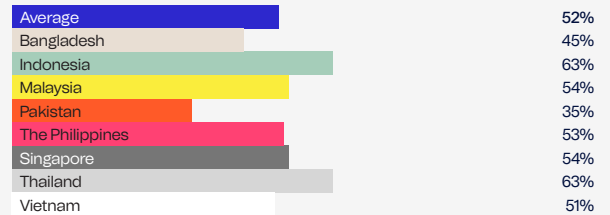
Increased use for physical fitness and wellness

Average	28%
Bangladesh	26%
Indonesia	35%
Malaysia	26%
Pakistan	17%
The Philippines	27%
Singapore	26%
Thailand	38%
Vietnam	30%
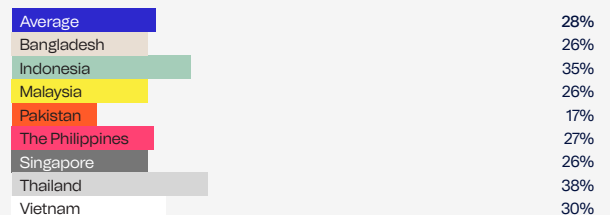
Opening up new opportunities at work

Mobile devices continue to be an important enabler when it comes to the careers of respondents. 83% believe mobile usage for work has improved or significantly improved productivity over the last five years. Those in **the Philippines** have gained the most, with 39% believing mobile use has dramatically impacted their working lives by significantly improving their productivity. Younger generations were most likely to indicate that they had experienced these improvements, a common theme in our report.

In **Bangladesh** and **the Philippines**, respondents are most likely to feel that mobile devices have improved or significantly improved the performance and quality of their work (93% and 95%, respectively, versus the regional average of 87%). Interestingly, respondents in **Singapore** were the least likely to feel that mobile devices had improved either their productivity or performance.

Mobile technology and devices continue to have positive impact in many areas of work

■ Significantly improved　■ Improved

Performance and quality	**Productivity**
53%	56%
35%	27%

Communication and relationships	**Career and skills development**
47%	53%
37%	30%

Impact of mobile technology in the workplace, by country

■ Significantly improved　■ Improved

Performance and quality

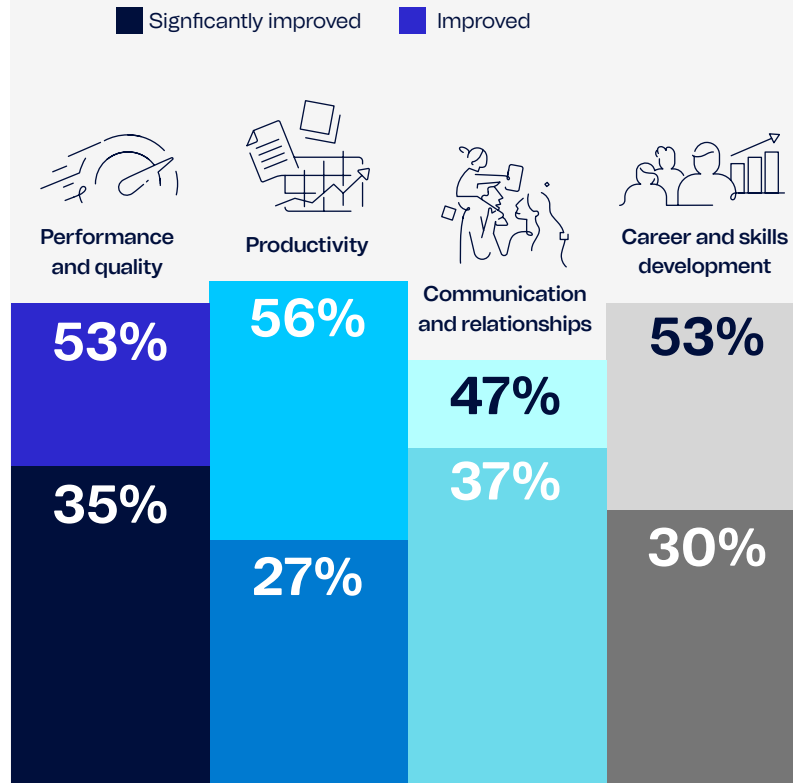|	Improved	Significantly improved	Total
Average	53%	35%	88%
Bangladesh	45%	47%	92%
Indonesia	67%	25%	92%
Malaysia	56%	30%	86%
Pakistan	43%	47%	90%
The Philippines	51%	43%	94%
Singapore	56%	18%	74%
Thailand	51%	31%	82%
Vietnam	51%	36%	87%

Communication and relationships

	Improved	Significantly improved	Total
Average	47%	37%	84%
Bangladesh	52%	30%	82%
Indonesia	65%	23%	88%
Malaysia	58%	25%	83%
Pakistan	51%	26%	77%
The Philippines	53%	39%	92%
Singapore	58%	17%	75%
Thailand	56%	27%	83%
Vietnam	54%	30%	84%

Productivity

	Improved	Significantly improved	Total
Average	56%	27%	83%
Bangladesh	52%	30%	82%
Indonesia	65%	23%	88%
Malaysia	58%	25%	83%
Pakistan	51%	26%	77%
The Philippines	53%	39%	92%
Singapore	58%	17%	75%
Thailand	56%	27%	83%
Vietnam	54%	30%	84%

Career and skills development

	Improved	Significantly improved	Total
Average	53%	30%	83%
Bangladesh	36%	55%	91%
Indonesia	56%	31%	87%
Malaysia	50%	29%	79%
Pakistan	40%	45%	85%
The Philippines	45%	50%	95%
Singapore	52%	20%	72%
Thailand	48%	31%	79%
Vietnam	47%	34%	81%

Upskilling to upscale careers

In 2022, our **Digital Lives Decoded** reports highlighted how mobile use was helping people across the region flourish in career and skills development. While the trend has slowed, perhaps due to post-pandemic adjustments, it remains noteworthy. 30% of regional respondents continue to feel that mobile use has significantly improved their career and skills development.

Those noting significantly improved access to careers and skills development brought about by mobile devices over the last 5 years

Average 2022	52%
Average 2023	**30%**
Bangladesh	37%
Indonesia	21%
Malaysia	24%
Pakistan	44%
The Philippines	38%
Singapore	14%
Thailand	29%
Vietnam	32%

This is especially evident in **Pakistan**, with 45% and 40% of respondents seeing their career and skills development significantly improve and improve respectively in the past five years. Interestingly, respondents in **Singapore** were 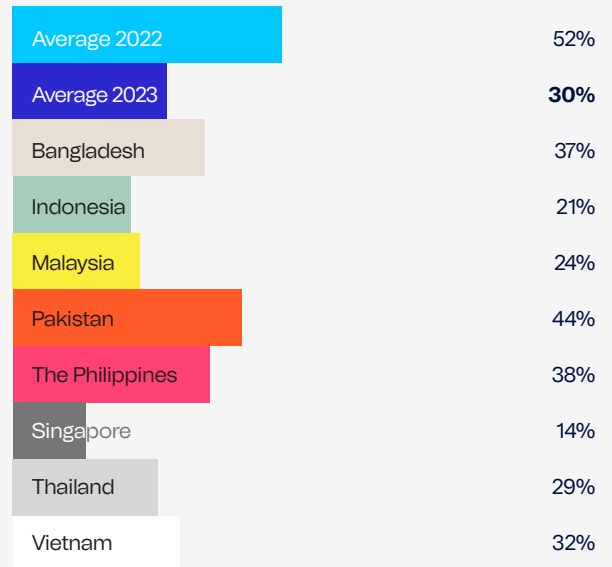the least likely to feel the impact of mobile on their careers. Only 62% believed mobile has improved their career and skills development, and only 75% acknowledged its impact on their productivity and performance, compared to the regional average of 83% on both dimensions.

Striking the right balance

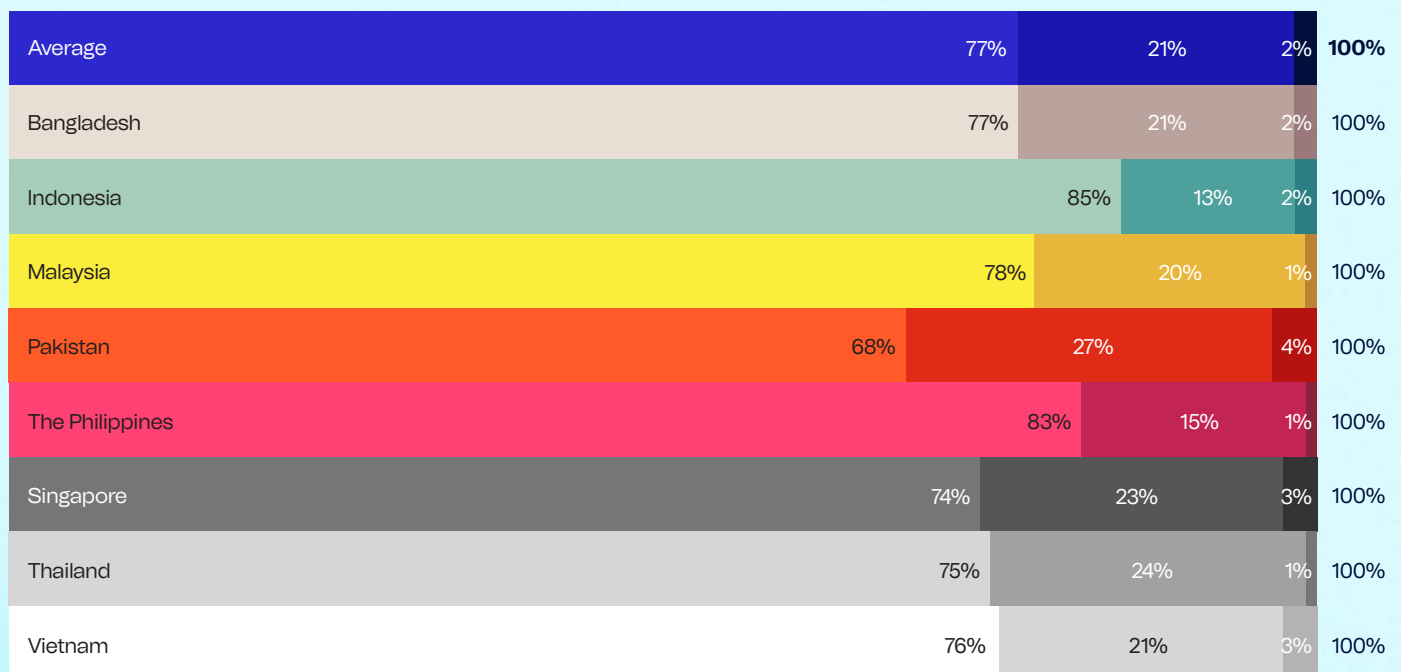Remarkably, a significant majority of respondents reported an improvement in their work-life balance from mobile use, with only 7% expressing otherwise. **Singapore** respondents, however, held a different view compared to their regional counterparts, with 20% feeling that mobile use does not positively contribute to their work-life balance.

The findings also highlight the positive influence mobile use has on overall wellbeing. Less than 10% of respondents report experiencing negative emotions such as anxiety due to mobile use. Moreover, 77% of respondents feel that they have achieved a good balance with the mobile in their private life.

How do you feel overall about your relationship with the mobile phone in your private life?

Legend: ■ Good balance ■ Overusing ■ Underutilising

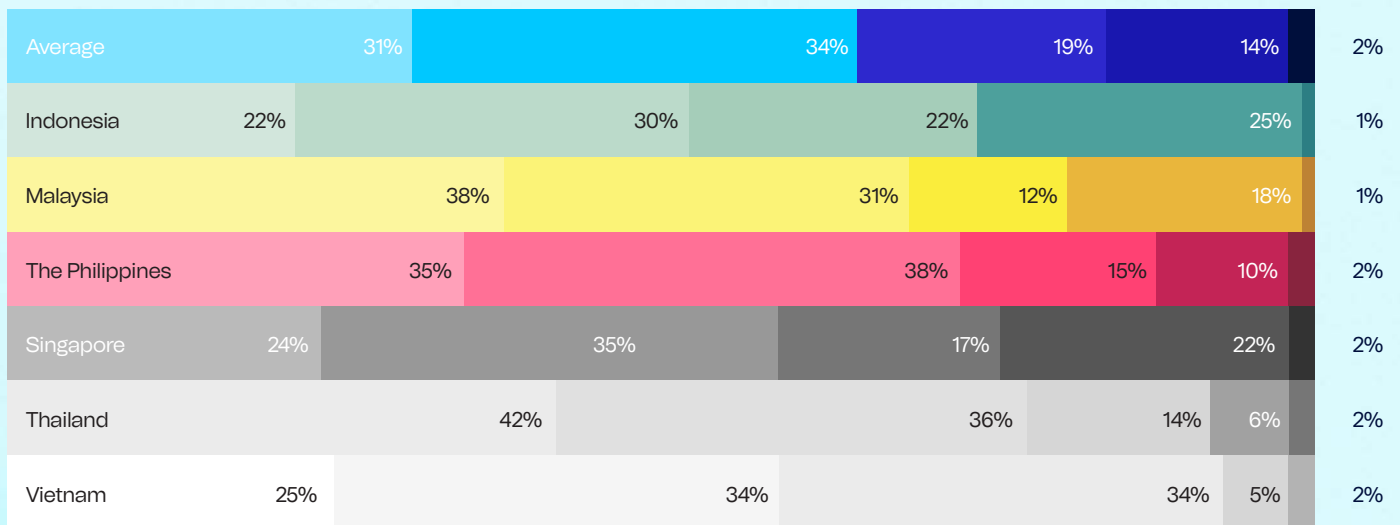|	Good balance	Overusing	Underutilising	Total
Average	77%	21%	2%	**100%**
Bangladesh	77%	21%	2%	100%
Indonesia	85%	13%	2%	100%
Malaysia	78%	20%	1%	100%
Pakistan	68%	27%	4%	100%
The Philippines	83%	15%	1%	100%
Singapore	74%	23%	3%	100%
Thailand	75%	24%	1%	100%
Vietnam	76%	21%	3%	100%

5G potential gains momentum

By 2030, it is expected that 41% of all mobile connections in the Asia Pacific will be powered by 5G, amounting to 1.4 billion 5G connections (GSMA Mobile Economy APAC 2023 Report). Regionally, in Southeast Asia, we are starting to see this play out. The South Asian markets included in this study (**Bangladesh** and **Pakistan**) are in the initial stages of 5G exploration.

On the whole, 34% of our respondents say they use a 5G connection to power their mobile devices most of the time, with key uses being video/music streaming (78%) and work/studies (72%). Women are more likely than men to use this enhanced connectivity to access health and wellbeing opportunities (50% versus 41%) and education and training (57% versus 51%).

Frequency of usage – 5G networks

Legend: ■ All the time ■ Most of the time ■ Some of the time ■ None of the time ■ Unsure

	All the time	Most of the time	Some of the time	None of the time	Unsure
Average	31%	34%	19%	14%	2%
Indonesia	22%	30%	22%	25%	1%
Malaysia	38%	31%	12%	18%	1%
The Philippines	35%	38%	15%	10%	2%
Singapore	24%	35%	17%	22%	2%
Thailand	42%	36%	14%	6%	2%
Vietnam	25%	34%	34%	5%	2%

Due to the faster internet speeds available through 5G, have you used your mobile phone more in any of the following areas?

On the other hand, for the 16% do not use 5G at all, they cite reasons such as not having a 5G-enabled phone (52%) or a lack of coverage (39%).

Significant regional variations on the adoption and future adoption of 5G also remain. More work must be done to ensure fair access to 5G advancements is possible for all.

	Education/ Training	Health and Wellness
Average	50%	46%
Female	53%	49%
Male	47%	42%

Reasons for not accessing 5G networks

	Lack of coverage in my area	Avoid high data charges	Phone does not have 5G functionality	No need for faster internet speed
Average	33%	18%	57%	21%
Indonesia	40%	6%	71%	10%
Malaysia	46%	13%	57%	18%
The Philippines	34%	10%	68%	11%
Singapore	14%	40%	35%	45%
Thailand	22%	25%	76%	10%
Vietnam	46%	15%	44%	19%

Telenor's View

"We're at a juncture in Asia. While 4G remains an important technology for people's daily use of mobile, and will remain so for years to come in terms of both capacity and speed - 5G is starting to reshape the broader landscape. There are ambitious digital transformation agendas at the national level and more pressure on businesses, too. We are now in a situation where in addition to 5G, other key technologies i.e. AI, IoT and Cloud services are coming together at the same time. This is the beginning of a digital shift where 5G is the enabler of the "industrial internet". By bringing these technologies together we can create new opportunities for businesses and society.

The potential here is significant and Telenor Asia's operating companies are already working on big scale enterprise projects in many sectors. In the energy and shipping industries, they've built internet of things platforms for safer and smarter logistics. In banking and retail, they have solutions to digitalise and streamline customer touchpoints. In each case, the solutions are tailored to each enterprise's requirements.

A lot of future value will be in large scale industrial use cases using a combination of these technologies (5G, AI, IoT, Cloud, Edge Computing) with the right infrastructure, right partners and understanding of local regulations."

Eugene Teh
SVP and Head of Business Competence, Telenor Asia

Chapter Two: Creating a Safer Online World

Driver 3
A safer online experience
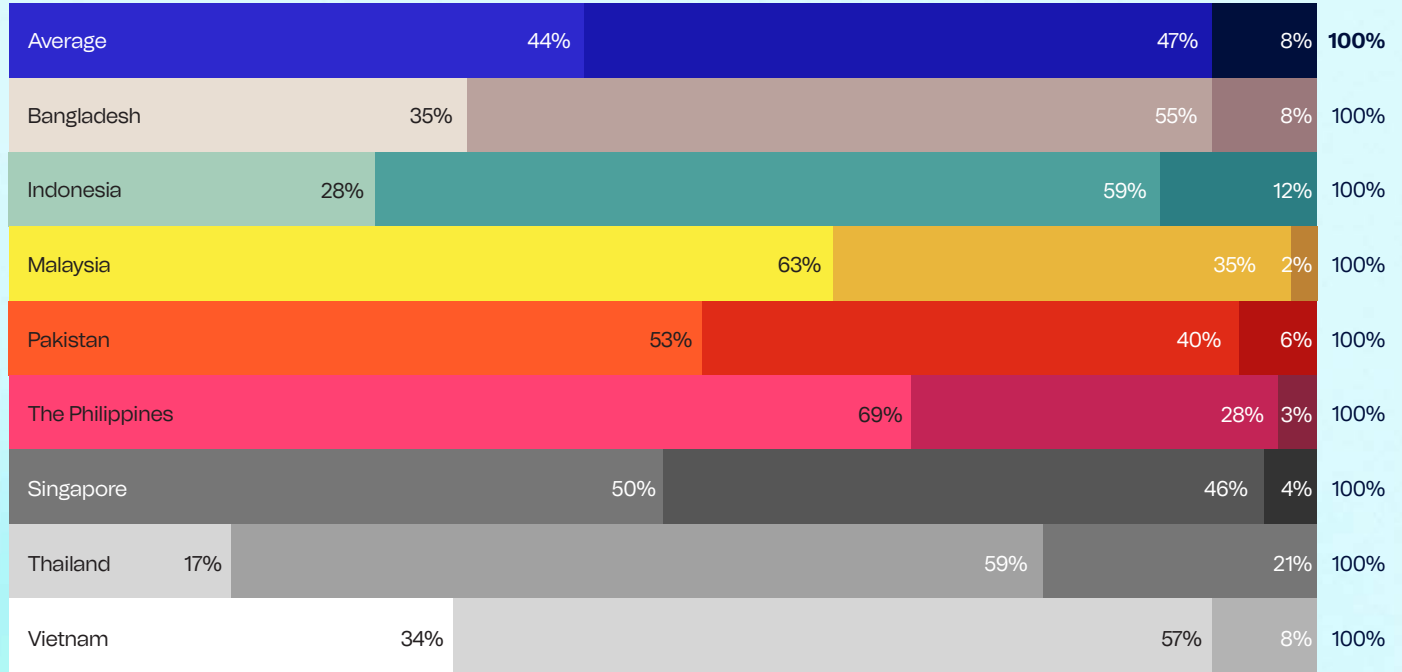
Growing concerns around security

As our mobile use grows, and with it, the number of devices we use to connect, so do people's concerns regarding privacy and security.

2023 will be marked as the year of generative AI. The advancements in AI tools and the potential they could unlock in people's lives are extraordinary, yet so are the threats these emerging technologies can bring if used irresponsibly. This has shed new light on how people regard the interplay between the technology that has become part of their day-to-day lives and the privacy or security of themselves and family members.

Of those interviewed, 57% stated that privacy and security considerations are paramount to how they approach the services and apps they access on their mobile device. A staggering 9 in 10 respondents said they were concerned about privacy and security, and just below half (44%) indicated they were very concerned. Filipinos (69%) are the most seriously concerned with **Thailand** an outlier for a second year with a mere 17% seriously concerned about the privacy and security on their phone.
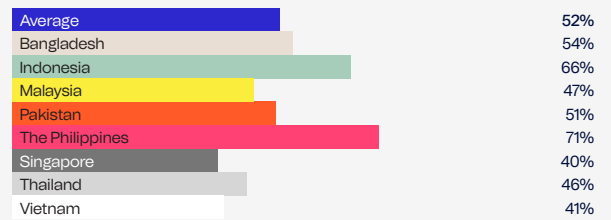
Level of concern over privacy and security on mobile devices
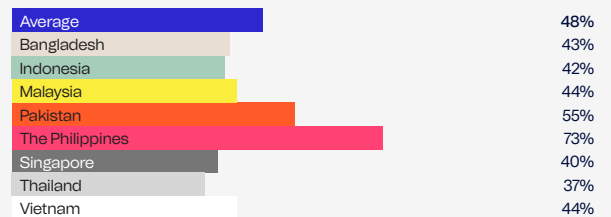
■ Very concerned   ■ Somewhat concerned   ■ Not concerned

	Very concerned	Somewhat concerned	Not concerned	Total
Average	44%	47%	8%	100%
Bangladesh	35%	55%	8%	100%
Indonesia	28%	59%	12%	100%
Malaysia	63%	35%	2%	100%
Pakistan	53%	40%	6%	100%
The Philippines	69%	28%	3%	100%
Singapore	50%	46%	4%	100%
Thailand	17%	59%	21%	100%
Vietnam	34%	57%	8%	100%

How concerned are you about the following security concerns on your mobile?

Data leakage (most concerned)

Average	52%
Bangladesh	54%
Indonesia	66%
Malaysia	47%
Pakistan	51%
The Philippines	71%
Singapore	40%
Thailand	46%
Vietnam	41%

Phishing (fake emails) and scams (most concerned)

Average	48%
Bangladesh	43%
Indonesia	42%
Malaysia	44%
Pakistan	55%
The Philippines	73%
Singapore	40%
Thailand	37%
Vietnam	44%

Digging deeper, data theft (52%) and phishing scams (48%) are of the most significant concern on a regional level. 29% of respondents indicate they encounter an instance of phishing at least once a week.

In terms of online content, more men than women are concerned about fake news (61% versus 53%), with men also saying they come across fake news on a more regular basis than women (56% to 46% at least once a week).

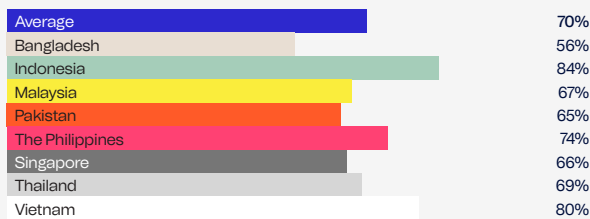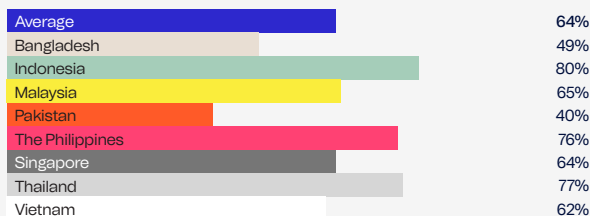## Key concerns about fake news when using mobile devices

Female

53%

Male

61%
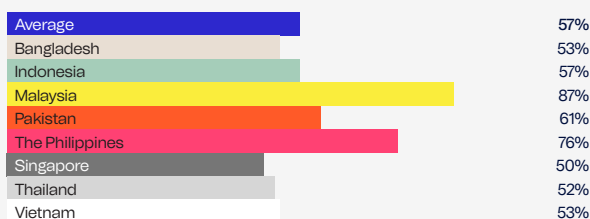
Key concerns about mobile usage

Data theft

Average	70%
Bangladesh	56%
Indonesia	84%
Malaysia	67%
Pakistan	65%
The Philippines	74%
Singapore	66%
Thailand	69%
Vietnam	80%

Identity theft

Average	64%
Bangladesh	49%
Indonesia	80%
Malaysia	65%
Pakistan	40%
The Philippines	76%
Singapore	64%
Thailand	77%
Vietnam	62%

Fake news

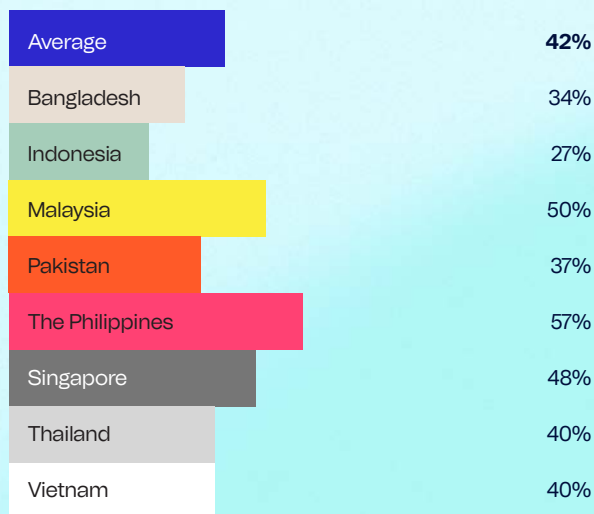|	
Average	57%
Bangladesh	53%
Indonesia	57%
Malaysia	87%
Pakistan	61%
The Philippines	76%
Singapore	50%
Thailand	52%
Vietnam	53%

Protecting ourselves and our loved ones online

While most of our respondents feel empowered and connected due to their mobile use, many have concerns for the online safety of vulnerable members of their family – the elderly and young children. Over three quarters (77%) highlight concerns over the online safety of elderly family members, with this being most apparent in **Malaysia** (90%), **the Philippines** (89%), and **Singapore** (84%). Those interviewed indicated an even greater concern for young people's online safety at 81%. This is most prominent in **the Philippines** (95%).
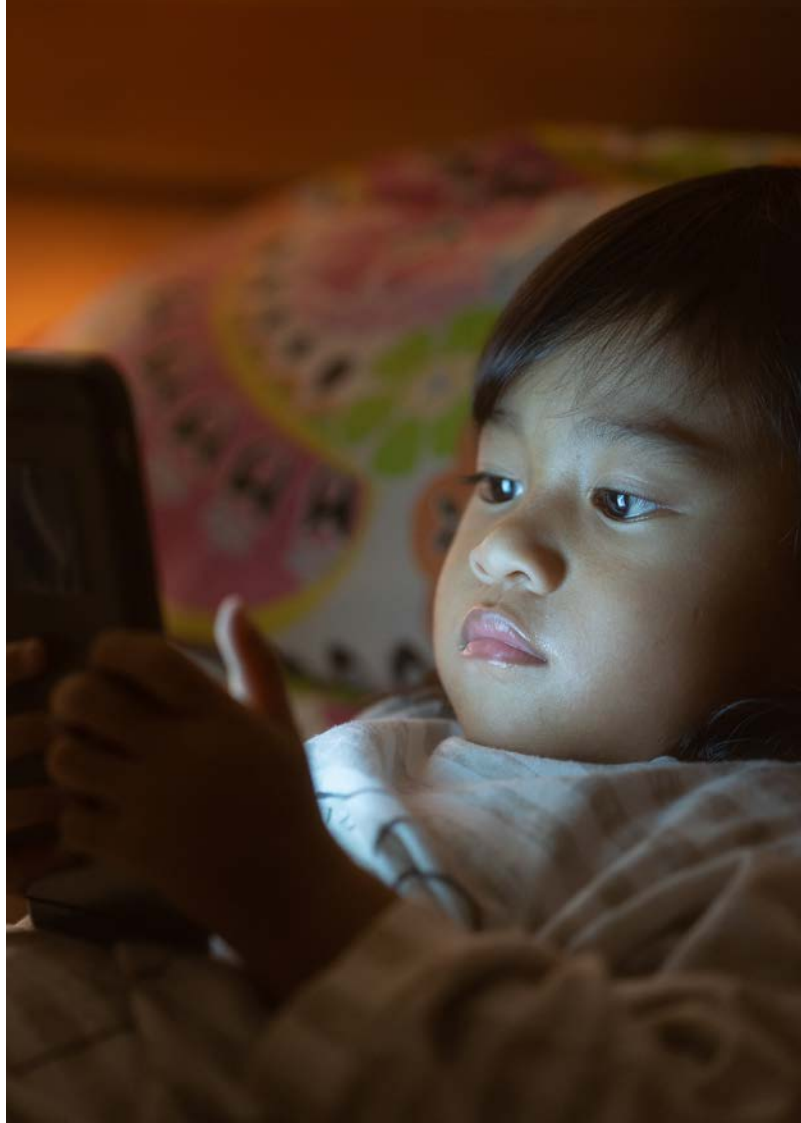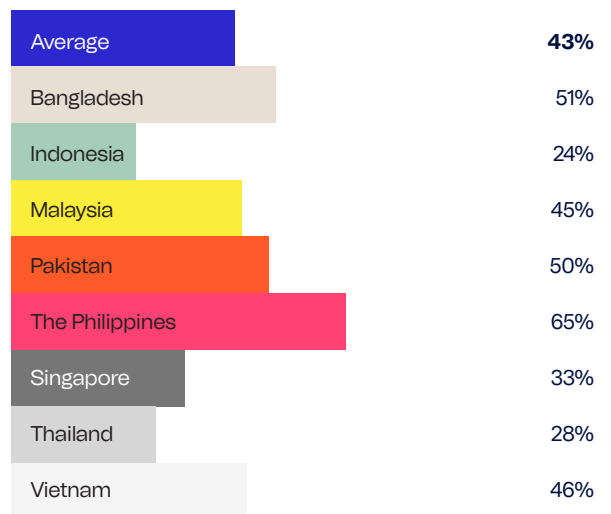
Respondents express concerns over online safety for elderly family members...

Significantly concerned

Average	**42%**
Bangladesh	34%
Indonesia	27%
Malaysia	50%
Pakistan	37%
The Philippines	57%
Singapore	48%
Thailand	40%
Vietnam	40%

...As well as for younger family members

Significantly concerned

Average	**43%**
Bangladesh	51%
Indonesia	24%
Malaysia	45%
Pakistan	50%
The Philippines	65%
Singapore	33%
Thailand	28%
Vietnam	46%

What do you think is the best way to educate your family members about online safety, by age?

Setting up parental/safety controls

Average	59%
Bangladesh	55%
Indonesia	69%
Malaysia	57%
Pakistan	57%
The Philippines	70%
Singapore	42%
Thailand	61%
Vietnam	60%
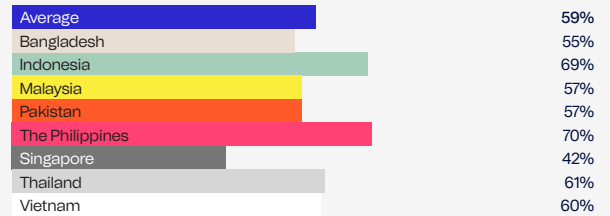
Having open discussions about online risks

Average	71%
Bangladesh	75%
Indonesia	61%
Malaysia	67%
Pakistan	74%
The Philippines	79%
Singapore	71%
Thailand	72%
Vietnam	67%

Providing guidelines for safe online behaviour

Average	67%
Bangladesh	66%
Indonesia	78%
Malaysia	64%
Pakistan	65%
The Philippines	71%
Singapore	60%
Thailand	68%
Vietnam	66%
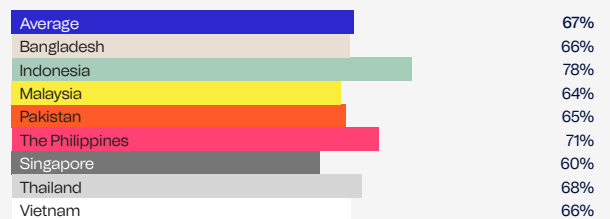
Regularly monitoring their online activities

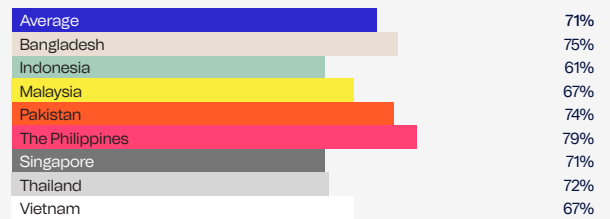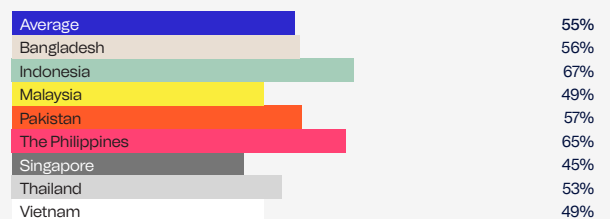|	
Average	55%
Bangladesh	56%
Indonesia	67%
Malaysia	49%
Pakistan	57%
The Philippines	65%
Singapore	45%
Thailand	53%
Vietnam	49%

Encouragingly, many of our respondents feel there are ways to combat these risks. 71% of people say the best way to combat online safety is through open discussion with family members about online risks. This was followed by 67% believing that providing guidelines for safe online behaviour is the best way to ensure the safety of their most vulnerable family members. It is clear that respondents across the region believe the best preventative measures are through education.

All stakeholders have a part to play

In terms of individual online security, 89% feel that skills gaps could put them at risk of scams and security breaches, and almost 50% feel somewhat concerned over their ability to keep pace with future changes. Of those feeling very concerned, it is the younger generations who worry most about the potential skills gap and risk of scams and breaches. This most likely reflects the level of touch points younger people have with mobile technology and how aware they are of the changes in technology – such as those being introduced by Artificial Intelligence.

Level of concern that a skills gap may expose respondents to security risks while using mobile device, by age group

■ Concerned   ■ Not concerned

	Concerned	Not concerned	Total
Average	89%	11%	**100%**
Bangladesh	90%	10%	100%
Indonesia	86%	14%	100%
Malaysia	96%	4%	100%
Pakistan	95%	5%	100%
The Philippines	93%	7%	100%
Singapore	92%	8%	100%
Thailand	74%	26%	100%
Vietnam	89%	11%	100%

Who should take responsibility for mobile security?

Device manufacturer
11%

Telco
16%

Government
11%

User
20%

Shared responsibility from all of the above
39%

Unsure
2%

While respondents seek solutions, they do not believe the responsibility rests with any single stakeholder. 39% feel that mobile security is a shared responsibility between the device manufacturer, telco, government, and the individual end-user, highlighting the necessity for open dialogue and joint working between stakeholders in the mobile value chain.
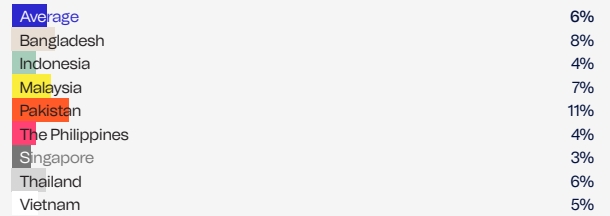
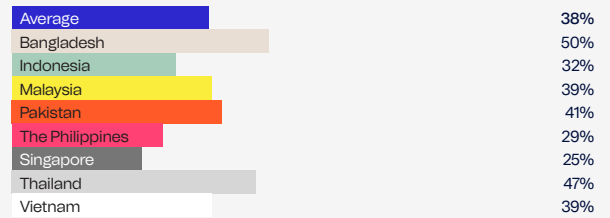## More must be done to combat online harassment

Online harassment or bullying is a huge concern for many people and has impacted the lives of many of our respondents. 17% of those participating in our survey said they experience online harassment or bullying at least once a month, which is highest in **Bangladesh** (23%) and lowest in **Singapore** (11%). Men (19%) appear more likely to experience negative behaviour directed towards them than females (15%).

How frequently have you experienced the following in the last 1-2 years? Online harassment or bullying

Daily

Average	6%
Bangladesh	8%
Indonesia	4%
Malaysia	7%
Pakistan	11%
The Philippines	4%
Singapore	3%
Thailand	6%
Vietnam	5%

At least once a month

Average	38%
Bangladesh	50%
Indonesia	32%
Malaysia	39%
Pakistan	41%
The Philippines	29%
Singapore	25%
Thailand	47%
Vietnam	39%

Yet, most concerning amongst all our data is that online harassment or bullying is far more acute among younger generations than their older counterparts. Almost 70% of this demographic had experienced negative behaviour directed towards them online in the last 1 – 2 years, with some 79% stating that this had adversely impacted their mental health during this same period.
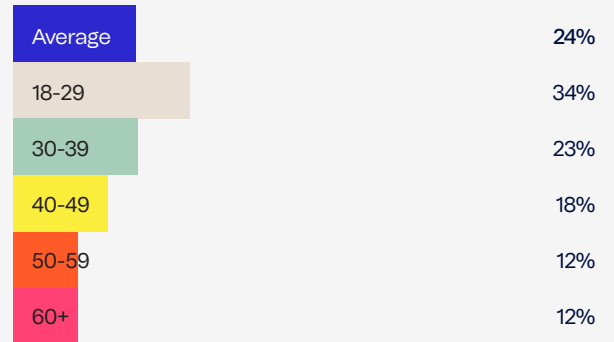
More action must be taken to support young people on this front. Much like online security, it is the responsibility of all stakeholders to ensure greater access to education and tools to help those most affected by harmful actions online.

Has your mental health and wellbeing been adversely affected by these experiences?
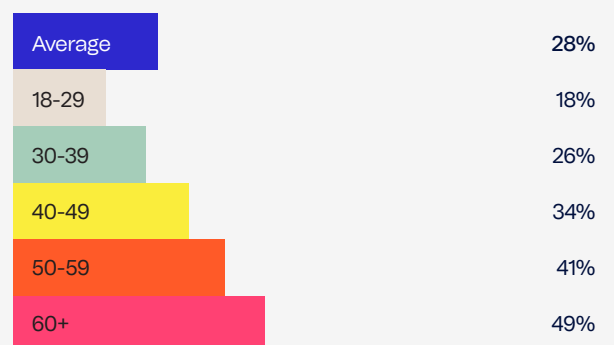
Yes, significantly

Average	24%
18-29	34%
30-39	23%
40-49	18%
50-59	12%
60+	12%

Yes, moderately

Average	44%
18-29	45%
30-39	47%
40-49	43%
50-59	41%
60+	34%

No

Average	28%
18-29	18%
30-39	26%
40-49	34%
50-59	41%
60+	49%

Telenor's View

"Digital skills are the currency of the future! This is a reality for everyone – whether it's the Thai girl grappling with cyberbullying on social media, or the Pakistani farmer seeking knowledge on climate change adaptation. Whether it's a small business in Malaysia reeling from a security breach, or youth in Bangladesh trying to integrate at the workplace. Everyone needs continuous learning and upgrading of skills to match the needs of today and the fast-approaching future.

Telenor has pledged to train 3 million people in digital skills between 2023 and 2025. The target audience includes children, youth and youth-led Small and Medium Enterprises across our footprint. Our initiatives place special focus on gender, vulnerable and marginalised groups. Through meaningful partnerships and based on our long history of working in this space, our projects will utilize both technological and hybrid solutions to include the digitally excluded, impart advanced skills, and ensure a safe online experience for all.

By synergising our expertise and modern technology, we can help advance people's digital future and open doors of opportunities in a safe way."

Zainab Siddiqui
VP Sustainability, Telenor Group

Chapter Three: A Gateway to the Future

Driver 4
Learning and growing with new skills and education

Driver 5
Reducing our impact on the planet

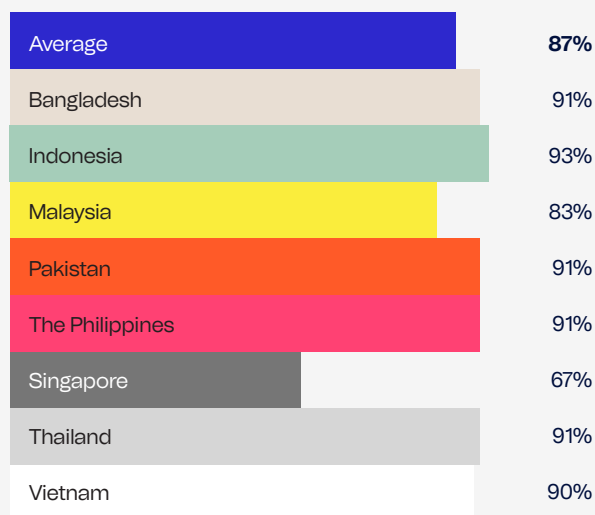## Learning and growing with new skills and education

Another way in which mobile use has changed people's lives is by opening up access to knowledge. Across generations, people are learning new skills, managing their finances, and building alternative income streams through their mobile.

Over half (56%) of those surveyed said their mobile use continues to open the door to learning new skills and 87% of respondents said they had used their mobile to learn a new skill in the last 12 months. People in **Indonesia** were most likely to use their mobile device to learn new skills, with almost all those surveyed (93%) indicating that they had done so in the last year.
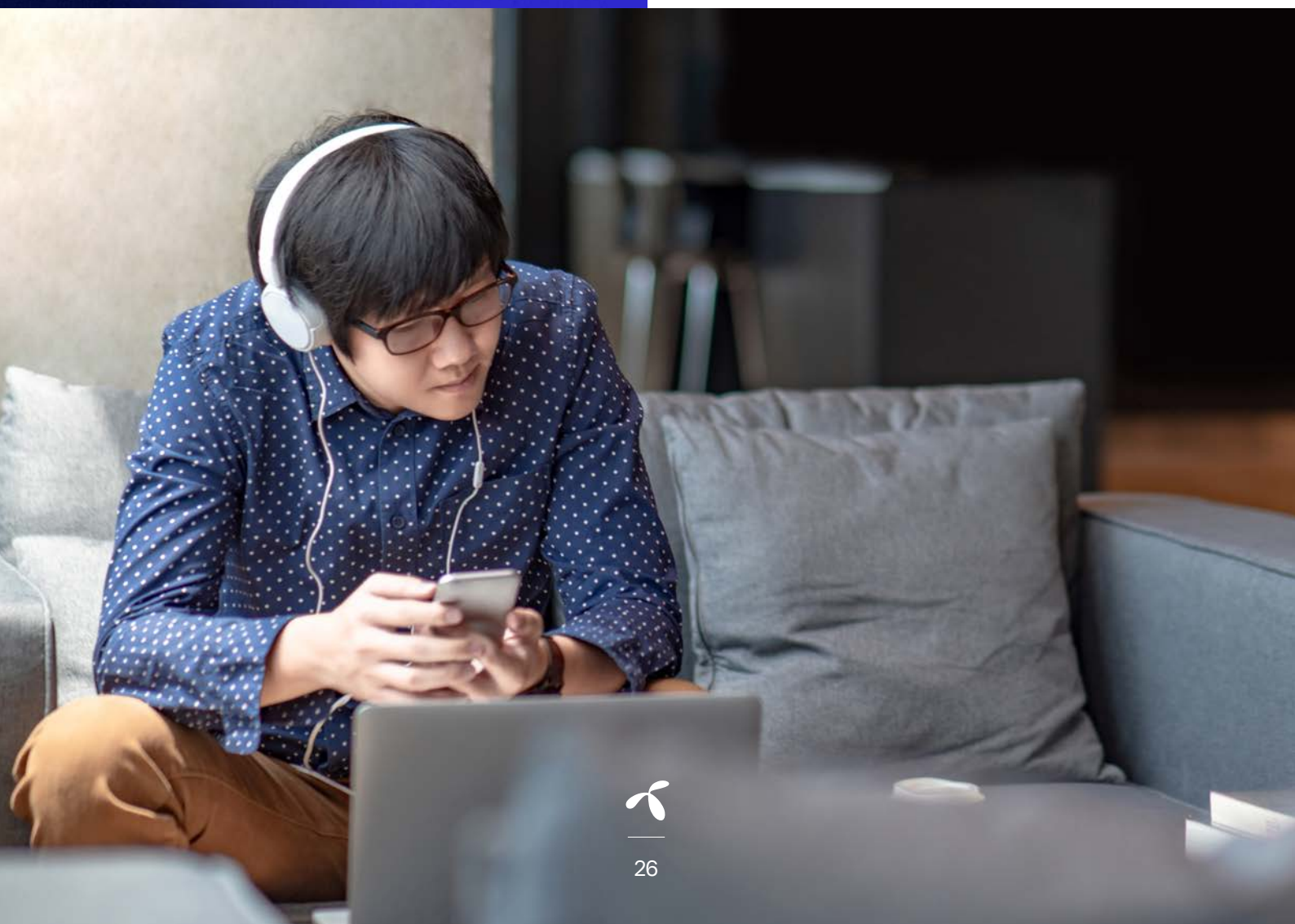
Across the region people plan to use their mobile to help them improve video and photography skills, manage social media and sell on eCommerce sites. In **Thailand**, 67% of respondents want to improve communication skills, against a regional average of 57%. In **Bangladesh**, 66% of people hope their new online skills can get them ahead at work or enter a new line of work. In **Pakistan**, people have been using mobile to access educational content significantly more than any other nation surveyed (68% daily).

Proportion of respondents who have used their mobile device to learn a new skill over the last 12 months

Average	**87%**
Bangladesh	91%
Indonesia	93%
Malaysia	83%
Pakistan	91%
The Philippines	91%
Singapore	67%
Thailand	91%
Vietnam	90%

New skills people hope to gain on their mobile

|	Selling on e-commerce	Communication skills e.g. languages	Using generative AI tools like Chat GPT	Graphic design / digital marketing	Social media management
Average	**49%**	**57%**	**44%**	**32%**	**50%**
Bangladesh	**50%**	**60%**	**49%**	**42%**	**56%**
Indonesia	**54%**	**55%**	**44%**	**39%**	**49%**
Malaysia	**46%**	**52%**	**39%**	**28%**	**45%**
Pakistan	**52%**	**65%**	**36%**	**39%**	**58%**
The Philippines	**56%**	**40%**	**52%**	**36%**	**45%**
Singapore	**36%**	**48%**	**41%**	**19%**	**30%**
Thailand	**47%**	**67%**	**47%**	**31%**	**63%**
Vietnam	**48%**	**70%**	**44%**	**23%**	**50%**

Younger respondents use their mobile devices at higher rates than older generations to learn a new skill (92% in the last 12 months) and significantly improve their career and skills development (34%). At the same time, older generations should not be overlooked, with 64% of the 60-plus group stating they felt a sense of accomplishment in learning new skills – the highest among any of the age groups surveyed.

Proportion of respondents who have used their mobile device to learn a new skill over the last 12 months, by age group

Group	Percentage
Average	87%
18-29	92%
30-39	89%
40-49	84%
50-59	78%
60+	74%

These new skills are providing people with a sense of accomplishment and personal wellbeing

Group	Percentage
Average	48%
18-29	41%
30-39	47%
40-49	52%
50-59	56%
60+	64%
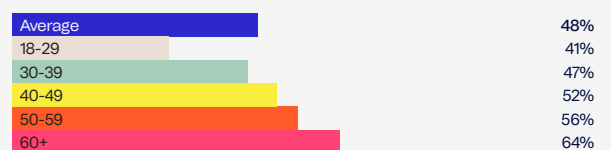
Boosting the economy through new income streams

The new skills people are picking up through their mobile use can enable them to build new income streams. 67% said they would like to use the skills they have learned via their mobile device to earn additional income – with this highest in **Indonesia** (74%) and lowest in **Singapore** (50%).

People hope to put their new skills into action in a number of different ways

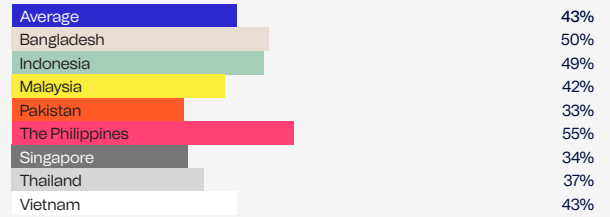|	Additional income stream	Ahead/ promoted at work	Entering a new line of work	Applying for a new job	Establishing a new business	Builds personal wellbeing
Average	67%	42%	45%	27%	31%	48%
Bangladesh	66%	66%	63%	42%	35%	35%
Indonesia	74%	33%	45%	19%	47%	55%
Malaysia	60%	38%	43%	32%	31%	42%
Pakistan	75%	23%	49%	34%	42%	63%
The Philippines	71%	45%	36%	29%	33%	36%
Singapore	50%	28%	31%	25%	20%	48%
Thailand	72%	53%	37%	18%	31%	57%
Vietnam	71%	47%	57%	17%	13%	46%

Making better environmental choices

Due to the increased reality of the environmental crisis, climate change and sustainability are increasingly important subjects for everyone, irrespective of age. 90% of respondents are concerned or very concerned about carbon emissions and the associated impact on climate change.
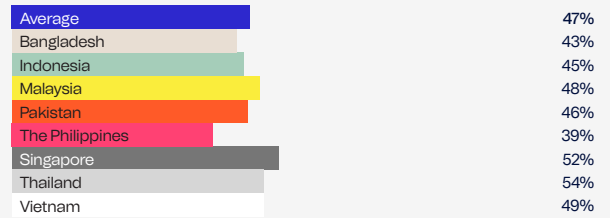
Critically, 72% of the people we surveyed felt that their mobile device helps them live more sustainably by reducing their paper usage, affording them access to education and information, and being more informed about daily life choices, such as information around transport options. Encouragingly, over 70% of respondents across the region used apps related to environmental sustainability weekly, except for Indonesia and Singapore, where only 54% of respondents do so.

People across the region express a high level of concern over carbon emissions and the impact on climate change
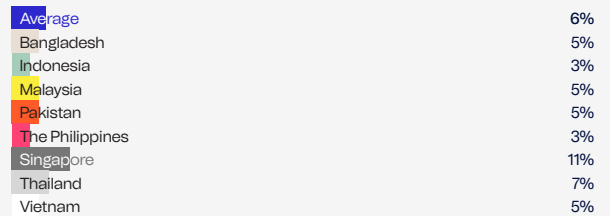
Very concerned

Average	43%
Bangladesh	50%
Indonesia	49%
Malaysia	42%
Pakistan	33%
The Philippines	55%
Singapore	34%
Thailand	37%
Vietnam	43%

Somewhat concerned

Average	47%
Bangladesh	43%
Indonesia	45%
Malaysia	48%
Pakistan	46%
The Philippines	39%
Singapore	52%
Thailand	54%
Vietnam	49%

Not concerned

Average	6%
Bangladesh	5%
Indonesia	3%
Malaysia	5%
Pakistan	5%
The Philippines	3%
Singapore	11%
Thailand	7%
Vietnam	5%

Do you feel your mobile phone allows you to live more sustainably?

Yes

Average	**72%**
Bangladesh	68%
Indonesia	78%
Malaysia	74%
Pakistan	93%
The Philippines	76%
Singapore	58%
Thailand	71%
Vietnam	57%
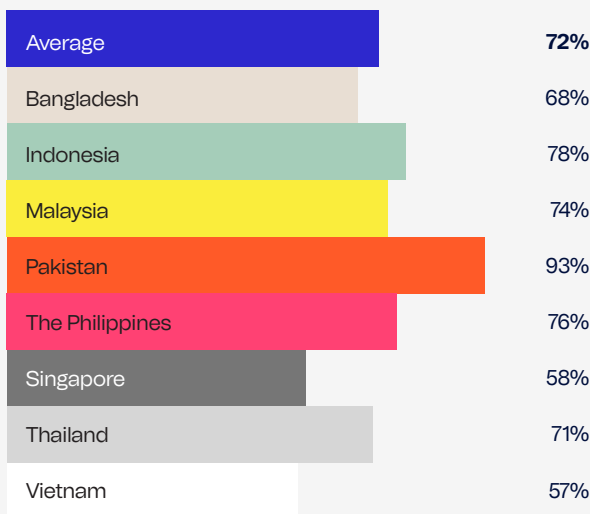
From SP Group in **Singapore** helping people track their carbon footprint, through to a marketplace called GreenDay that lists sustainable products from eco-conscious merchants in **Malaysia**, apps provide users with increasing ways to live more sustainable lives. Of note, respondents in **Pakistan** were the most enthusiastic about how they can use their mobile to live more sustainably (93%).

Consumers demand more from their mobile providers

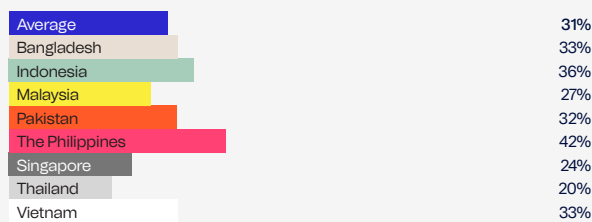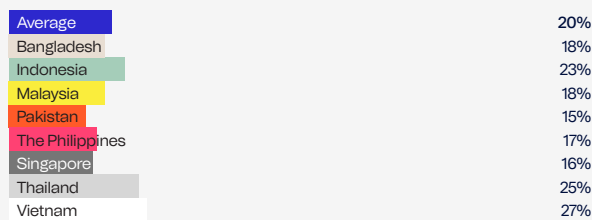As people become more informed about climate change, they demand more from their mobile operators. Almost 80% say they would pay more to switch to a mobile plan that produces a substantially lower carbon footprint, with 51% regionally saying they would pay up to 10% – in **Vietnam**, this number who would pay 10% more jumps to 60%. Moreover, 70% say that the sustainability practices of their telecoms provider are important in their choice of whether to use them or not, with **the Philippines** (81%) and **Bangladesh** (79%) being the highest in the region and **Singapore** being the lowest (48%).

How important are climate change and sustainability practices in influencing your choice of telecommunications provider?

- Very important
- Important
- Somewhat important
- Not important/unconcerned

	Very important	Important	Somewhat important	Not important/unconcerned	
Average	38%	32%	19%	11%	100%
Bangladesh	40%	39%	15%	6%	100%
Indonesia	38%	39%	14%	9%	100%
Malaysia	34%	32%	23%	11%	100%
Pakistan	46%	29%	20%	5%	100%
The Philippines	56%	25%	13%	6%	100%
Singapore	24%	24%	28%	24%	100%
Thailand	33%	32%	25%	10%	100%
Vietnam	30%	37%	19%	14%	100%

Proportion of users willing to pay more for a mobile plan with a lower carbon footprint

Yes, willing to pay up to 5% more

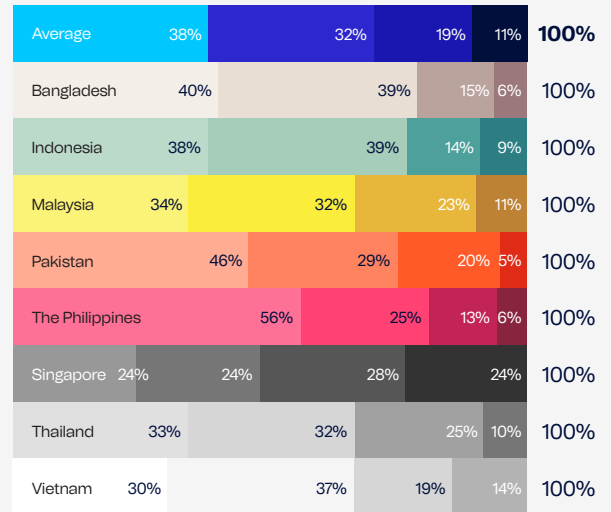|	
Average	31%
Bangladesh	33%
Indonesia	36%
Malaysia	27%
Pakistan	32%
The Philippines	42%
Singapore	24%
Thailand	20%
Vietnam	33%

Yes, willing to pay up to 10% more

Average	20%
Bangladesh	18%
Indonesia	23%
Malaysia	18%
Pakistan	15%
The Philippines	17%
Singapore	16%
Thailand	25%
Vietnam	27%

Yes, willing to pay up to 15% more

Average	11%
Bangladesh	12%
Indonesia	11%
Malaysia	11%
Pakistan	10%
The Philippines	8%
Singapore	9%
Thailand	15%
Vietnam	15%

This is encouraging, however, some caution is advised in reading these particular results based on data from other sustainability studies conducted in the region, for example the e-Conomy SEA 2022 report conducted by Google, Temasek and Bain & Company indicates a sizeable gap between what consumers say and actual purchasing behaviour.

While interest in sustainability is rising across the region, the same study found that consumers generally have insufficient information about the available sustainable choices. When they do, they do not always trust the sustainability claims companies make.

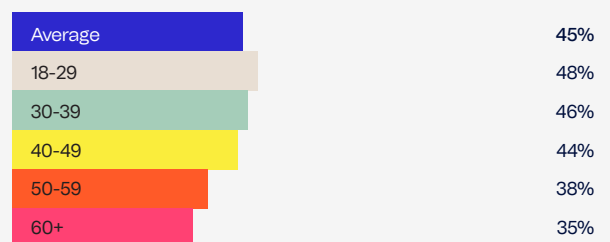# Young people benefit more than any other age group

The relationship between young people (18–29) and mobile use has been discussed extensively, often through the prism of social media. Throughout our 2023 report, we have shown the importance of mobile use across many touch points of a young person's life. Often providing them with greater freedom to make choices that enhance their lives. Many young people use their mobile devices to supercharge their careers, to enter a new line of work (48%) and/or apply for a new job (33%), and as mentioned previously, to learn new skills and drive their career development. Our data suggests these positive trends with young people cut across different markets.

Young people are using their devices to demand and take action. 42% of our respondents in that age group are very aware of their carbon footprint, and 41% state that the sustainability practices of their telco provider are very important to them. They are also the most likely to say that their mobile device allows them to live more sustainably – some 75% of respondents asked across the region.
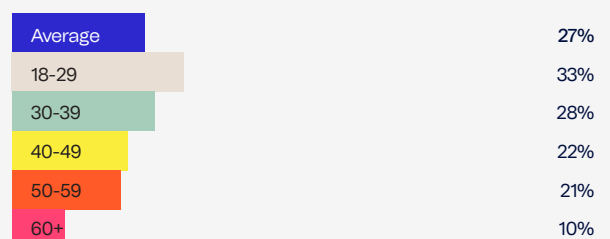
Whether to improve communication skills (59%), such as languages, or to develop new income streams through becoming a content creator (39%), young people are switching on and finding agency in mobile connectivity.

Young people are upskilling on their mobile devices and are using these skills to enter new lines of work or apply for new jobs

Entering a new line of work

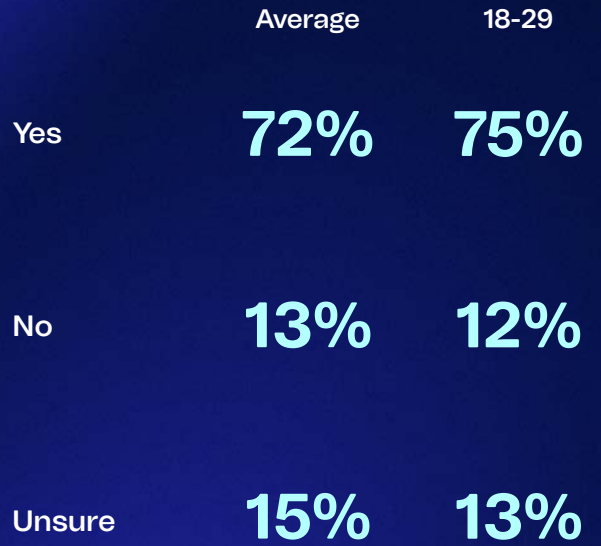|	
Average	45%
18-29	48%
30-39	46%
40-49	44%
50-59	38%
60+	35%

Applying for a new job

Average	27%
18-29	33%
30-39	28%
40-49	22%
50-59	21%
60+	10%

Younger people are more aware of their carbon footprint

■ Average ■ 18-29 year olds

Very Aware

Somewhat Aware

42%

34%

44%

36%

Do you feel your mobile phone allows you to live more sustainably?

	Average	18-29
Yes	72%	75%
No	13%	12%
Unsure	15%	13%
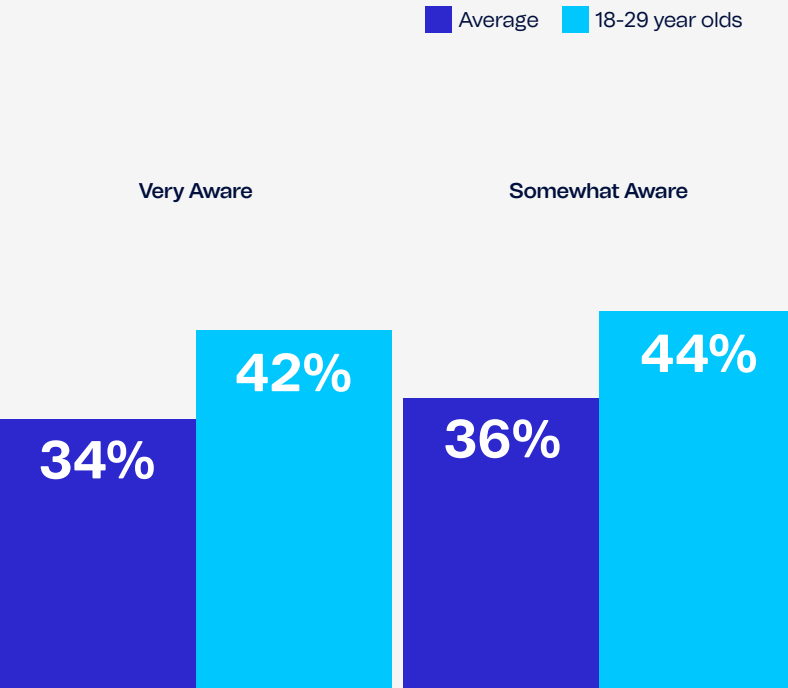
Younger people are more likely to have learnt a new skill via their mobile device over the last 12 months

	Average	18-29
Yes	87%	92%
No	9%	5%
Unsure	4%	3%
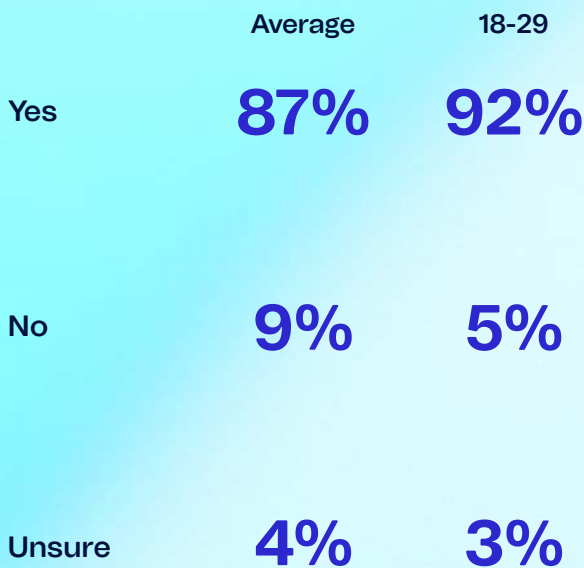
They are using these skills to improve their communication skills...

	18-29
Communication skills e.g. languages	59%

...or become content creators

	18-29
Become a content creator	39%

Telenor's View

"The effects of climate change is happening all around us. Countries such as Pakistan and Bangladesh are amongst the most vulnerable to increasing levels of extreme weather – posing risk to both people and infrastructure.

At Telenor, action starts with climate mitigation. Anchored on Science-Based targets we have set under the Science-based target Initiative (SBTi), we aim to reduce our scope 1 and 2 emissions by 50% by 2030, by swapping diesel generators with solar battery solutions, and purchasing renewable energy where we can. We also have a Scope 3 target to get 68% of suppliers to set their own science-based targets by 2025.

Climate adaption comes next. Telenor Asia is proactively working to ensure that we have energy efficient and resilient networks through a combination of measures such as elevating, protecting, or hardening towers and network equipment, ensuring battery backups, solar panels, and raising sensitive equipment above flooding levels.

Last, but not least, is climate enablement. If we are to transition into a low emission future there is no escape from radically improving and redefining all sectors of our economy – be it our cities, transportation, farming, and industries. The telecom industry is central to delivering on this, through connectivity, smart solutions and IoT. "

Johan Martin Seland
Head of Sustainability, Telenor Asia

Conclusion

People are still overwhelmingly positive about the impact mobile connectivity has on their lives. The findings from this year's study point to the great potential this holds at an individual level, for businesses and for society at large.

Last year's study had a clear imprint from the pandemic, largely in the changed behaviours it pointed to. This year, the findings indicate how these changed behaviours and digital resilience are being built upon, and daily habits are being recalibrated.

So, how do this year's findings add up to a better digital life? People are using mobile technology to live better digital lives by learning new skills, improving relationships, creating new economic opportunities and living more sustainably. They are also taking steps to safeguard themselves, and vulnerable family members from online risks and harms.

People are using their phones to live better digital lives by learning new skills, improving relationships, creating new economic opportunities, and living more sustainably.

People's appetite to remain connected shows no sign of slowing down, and this year, a clearer picture emerges of the great opportunity this holds. To unlock the full potential of mobile, Telenor Asia has identified the following three areas for attention: first, promoting investment in connectivity networks; second, encouraging take-up of new technologies, and finally, a strong and continuous emphasis on digital skills.

1) Promoting investment in connectivity networks

As mobile becomes increasingly central to people's lives, continuous upgrading of networks is key to enabling next-generation digital life, work and business. Additionally, further investment in networks will be necessary to make them more secure and green. Governments should therefore prioritise investment in networks as a key policy outcome alongside traditional metrics such as competitive prices. Regulators should have a 'growth mandate' to promote industry growth alongside duty of care to consumers and the environment.

For example, spectrum management policies can be tuned towards encouraging network investment by lowering spectrum prices and introducing flexible payment schemes for spectrum fees. Furthermore, rationalising taxation policies, introducing measures that support cost-effective infrastructure deployment as well as fair and efficient use of universal service funds will drive greater internet adoption and boost the industry's capacity to reinvest into the sector. Ultimately, network investment will drive consumer and environmental outcomes but will require a reorientation of regulatory philosophy and approach.

2) Encourage take up of new technologies to advance digital societies

Our collective digital future will be shaped by emerging technologies, including 5G, AI and IoT, that will transform lives, modernise industries, and alter the course of the global economy. It is imperative for policy makers, ecosystem players and other stakeholders to adopt and encourage adoption of these technologies in a safe, responsible and sustainable manner.

On 5G adoption, the lack of a 5G-capable device and not needing faster internet speeds are among the top reasons cited in our survey for not taking up 5G. This points to a priority for policy interventions to address 5G-device accessibility as well as relevant skills and locally relevant digital content and services to move the needle in 5G adoption. Improving the willingness to adopt 5G will in turn improve investment incentives of the industry to invest in 5G networks.

Rapid take up of generative AI such as ChatGPT has increased the impetus to update or introduce new policies and frameworks that ensure ethical, trustworthy and fair AI. Policy design for fast-evolving technology domains such as AI necessitates active collaboration among stakeholders, including policymakers, regulators, academia, and the private sector – to ensure accountable and equitable deployment, not just from a moral perspective but also as a business imperative. Where open data sets for AI and other emerging technologies are used, governments are should consider a risk-based approach to ensure trustworthy use, protecting the data from both intentional tampering and unintentional inaccuracies while mitigating bias, data privacy and cybersecurity threats.

At the same time, Governments should ensure that policies and frameworks are pro-innovation. This calls for a 'Regulation 4.0' approach that promotes timely review and update of legacy frameworks in view of encouraging innovation; utilizing more flexible, light-touch co-regulatory approaches for new frameworks and allow regulatory sandboxes for experimentation.

3) A strong and continuous emphasis on digital skills

A critical component of an inclusive digital nation is ensuring that no individual, community, or business is left behind, maximising digitalisation's social and economic benefits. Enhancing digital skills among citizens is an important step of narrowing the usage gap by making everyone comfortable with a digital-first approach, enabling them to participate as creators and consumers of digital content. Failing to address this will result in many not being equipped to deal with the risks that come with technological advances, such as privacy concerns, security, fraud and misinformation.

The survey results highlight online bullying, phishing and data theft as key areas where digital skills need to be inculcated and developed. There is an urgent need for a holistic approach, including embedding ICT training in national curricula, developing programs (in consultation with the private sector) for lifelong training in advanced technical skills, encouraging adoption of new technologies by businesses of all kinds and developing policies that accelerate digital entrepreneurship. Telecom and technology companies with direct touch points with customers can supplement with online safety content in a range of different formats, including short form via social media, interactive forms via online games, and together with Governments and civil society in physical and virtual classrooms.

Overall, safeguarding users and our digital space is a joint responsibility and requires a multi-stakeholder approach. We, as individuals have a key responsibility to continuously up-skill and be aware and wary of new threats. Parents need to impart age-appropriate digital skills and hygiene to their children and we as a society need to help our seniors and less digital literate use the internet safely. Government and private sector can develop software, tools and protocols to supplement as well as address ecosystem-wide risks. A continuous emphasis and approach are necessary to keep up with a fast-evolving threat landscape.

Market snapshots

🇧🇩 Bangladesh

Mobile devices are empowering people in Bangladesh

- Bangladeshis are more likely than their regional counterparts (33% vs 22% on average) to feel that mobile devices have significantly improved their relationships with family members, including spouses and children.
- 77% feel they have a good balance in their mobile usage and do not feel they are overusing it, reflecting an improvement on the 71% reported in 2022.
- Compared to other countries, mobile users in Bangladesh and Pakistan feel the most empowered when using their mobile device for online activities such as shopping, using search engines and messaging others.
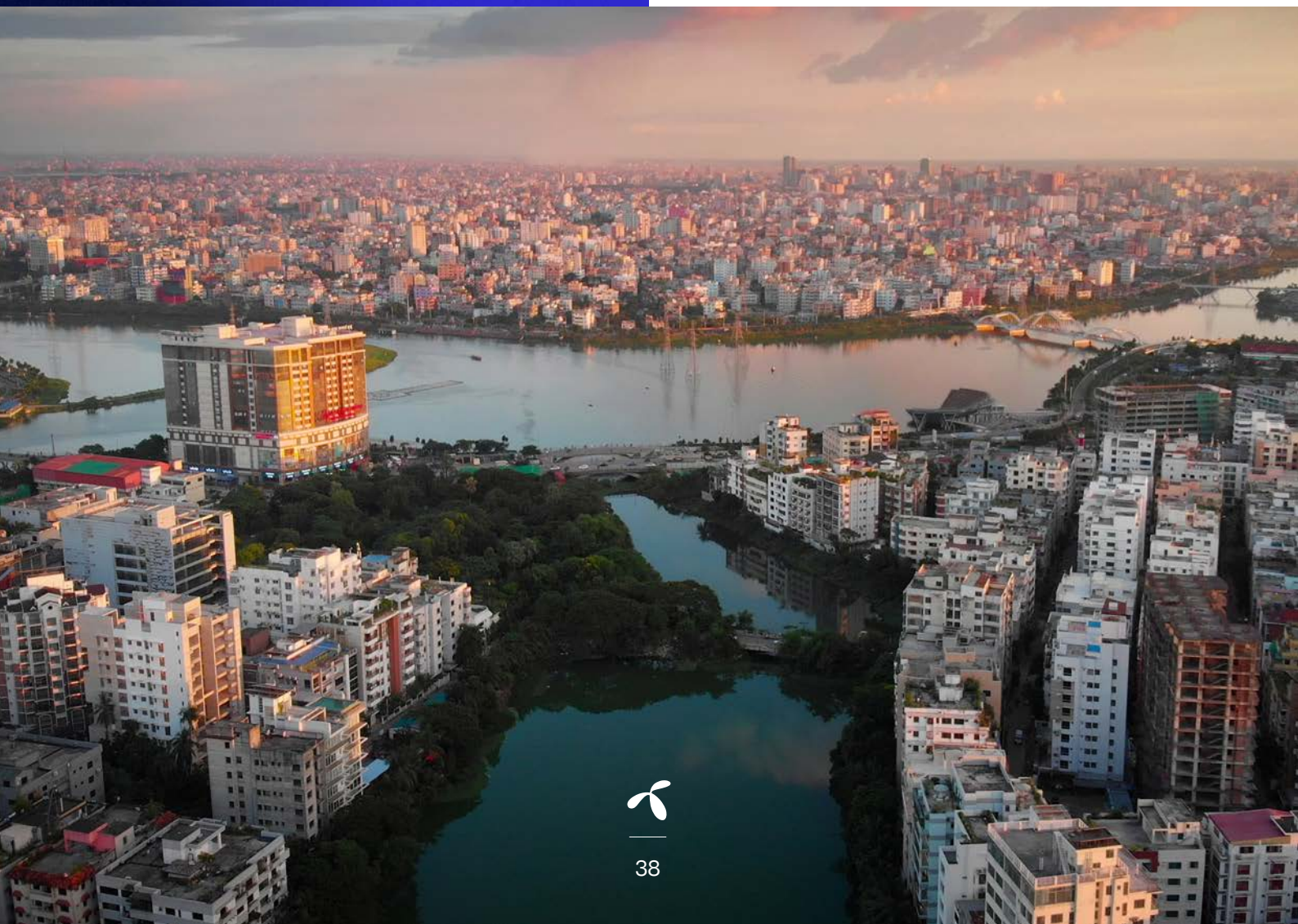
Over two-thirds feel very confident in their digital skills…

- Mobile users in Bangladesh and Indonesia feel the most confident in their digital skills to get the most out of the online world. 67% feel very confident, compared to 54% on average. However, females display markedly less confidence than their male counterparts (Females: 58%, Males 73%).
- Bangladeshis use their mobile device to access education, with 36% doing so, higher than the regional average of 27%. This trend is skewed towards male respondents (42%), contrasting with 2022 when a more even gender split was reported.

…And feel that mobile devices have significantly improved their performance and quality at work

- Respondents in Bangladesh are notably more inclined to believe that mobile devices have significantly improved their performance and quality at work over the last 1-5 years (47% vs 35% on average). This perception is particularly strong among those aged over 60 years.
- Bangladeshis are also among the most likely to feel that their employer fully utilises the potential of mobile technologies in the workplace (80% vs 70% overall).

They are also using their devices to learn new skills, but online safety and security are concerns

- Bangladeshis are most likely to use their mobile device to learn a new skill (91% vs 87% overall). They also indicate the greatest hope that these new online skills can get them ahead or enter a new line of work (63% vs 45% overall).
- When learning new skills through their mobile device, Bangladeshis are most likely to put these into practice by providing freelance or consultancy services through online channels (60% vs 37% on average).
- 82% of Bangladeshis say their employers are supportive of them using generative AI for work on their mobile devices, while 47% of them expect their use of generative AI to increase in the next six months.

- Online harassment or bullying has, however, impacted the lives of many of our respondents. Bangladeshi respondents are more likely to experience online harassment or bullying, with 49% experiencing this at least once a month, compared to 38% regionally.
- 90% are concerned about the privacy and security of their mobile devices, in line with the regional average. 42% view privacy and security concerns as the most significant barrier to making the most out of mobile devices at work.

The sustainability practices of mobile operators are a key decision-making factor for Bangladeshis

- 68% of Bangladeshis feel that their mobile devices allow them to live more sustainably, while 79% of Bangladeshis said that the sustainability practices of their mobile operator are either very important or important in their choice of whether to use them or not.
- 90% of Bangladeshis rely on their mobile phone in extreme weather events, with all saying their mobile use is important in monitoring and alerting them to extreme events in the future.

Indonesia

Indonesians expect work to be the primary driver of mobile device use over the next 2 years

- 70% of Indonesians expect mobile usage to increase over the next 1-2 years, most likely from greater use for work (86%), the highest among the countries surveyed. This is a decline from 2022 when 77% expected to increase mobile usage over the following 1-2 years.
- From the markets surveyed, Indonesians are most likely to feel that they have struck a good balance with their mobile usage (85% vs 77% overall feel like they are not overusing it). But it is worth noting that those aged 18-29 are likelier to feel they are overusing their mobile devices.
- When they fail to connect to the mobile internet, Indonesians are by far the most likely to have feelings of anxiety (60% vs a 40% average), with males and females equally impacted.

- 92% of Indonesians use digital wallets on their mobile device for payments, a significantly higher proportion than their regional counterparts (75% average).

Managing the cost of living through mobile devices is entrenched in the daily lives of Indonesians

- To manage their cost of living, cost-conscious Indonesians are most likely to use their mobile device to find deals (84% vs 65% overall) and compare prices (82% vs 70% overall), with females more likely to do so.

Mobile devices are also enhancing skills acquisition and workplace capabilities

- Indonesian's are least likely to feel that their employer is currently missing out on revenue opportunities afforded by mobile technology (40% vs 27% average) and are also least likely to feel that mobile technologies provide employees with an edge in the workplace.
- 93% of Indonesians have used their mobile device to learn a new skill over the last year, compared to an average of 87%, with males and females equally likely to have done so. 74% expect to use these newly acquired skills to provide an additional income stream.

Indonesians are confident in their skills to get the most out of the digital world

- Indonesians express the least concern about their ability to keep pace with future technological changes. 51% report that they are not concerned, compared to 27% overall.
- But 75% of Indonesians express concerns over online safety among younger family members compared to 80% on average.

Mobile devices are helping people in Indonesia live more sustainably

- 78% of respondents in Indonesia feel that their mobile device allows them to live more sustainably, higher than the regional average of 72%. Reduced paper usage and better access to information about transportation services are key drivers.

Malaysia

Malaysians are avid users of mobile technology

- On average, 89% of Malaysians spend at least half of their day using their mobile device, compared to 73%. One in five (20%) currently feel they are overusing technology, and nearly the same (19%) are never without their phone.
- When they cannot connect to the mobile internet, 46% of Malaysians feel frustrated, a larger proportion than the 39% reported overall.
- To manage their cost of living, mobile users in Malaysia are most likely to use budget apps and apps that track spending than their regional counterparts, with nearly half (49%) of them using such apps as compared to 41% overall.
- 83% of Malaysians have access to a digital wallet compared to 75% overall.

But digital skills gaps and keeping pace with technology are concerns for Malaysians

- Malaysians are among the least likely to feel very confident in their digital skills to get the most out of the online world (48% vs 54%).
- They are also most likely to feel very concerned about their ability to keep pace with future technological changes (43% vs 27% overall). Those aged 18-29 years are significantly more likely to express these concerns compared to those aged over 60 years.
- In addition, more than half (55%) of Malaysian respondents are most likely to feel that a skills gap could expose them to online risks such as scams or security breaches, compared to 40% regionally, with those ages 18-29 and females feeling most concerned.
- Malaysian respondents are most likely to indicate that their company is currently missing out on revenue

opportunities due to underdeveloped use of mobile technology (67%, compared to 54% on average).

- 49% of Malaysians expect to increase their use of generative AI in the workplace over the next 6 months, below the regional average of 55%. 39% hope to use their mobile devices to gain skills in generative AI, also below the regional average of 44%.

There are also deep concerns over the privacy and security of mobile devices

- 63% of Malaysians express great concerns over privacy and security on their mobile device, compared to 44% regionally.
- Data theft (67%), identity theft (65%) and fake news (57%) are the top three concerns around mobile use.
- They also acknowledge concerns over online safety for vulnerable family members such as the elderly (90% vs 77% overall).

Malaysians acknowledge the importance of sustainability in relation to their mobile usage

- 74% of Malaysians acknowledge that the mobile allows them to live more sustainably.
- 89% of Malaysians feel that climate change and sustainability practices are important in influencing their choice of telecommunications provider.
- Nearly half (47%) of those aged 18-29 are very concerned about the environmental impact of their mobile use, while four in 10 of say that climate and sustainability practices would influence their choice of telco.

Pakistan

Mobile users in Pakistan use their devices daily for education, healthcare and food delivery...

- Respondents in Pakistan are the most likely to expect significant increases in mobile device use over the next 1-2 years (37% vs 28% on average), with the greatest increase expected among those over 50 years. This is an uptick on 2022, when 32% expected to significantly increase their mobile usage over the next 1-2 years.
- Across the board, mobile users in Pakistan are among the most likely to feel empowered when using their mobile device for online activities such as shopping, using search engines and messaging others.
- Respondents in Pakistan are more likely than their regional counterparts to use their mobile device daily to access education (68% vs 27% overall), healthcare (27% vs 14% overall) and food and grocery delivery apps (30% vs 16% on average).

...But are most likely to feel they are overusing their devices

- Mobile users in Pakistan are most likely to feel they are overusing their devices with 27% expressing this sentiment (compared to 21% on average), the highest of the markets surveyed.
- When searching for news stories on social media, mobile users in Pakistan show a greater propensity to access stories using X (formerly Twitter) than other countries, with 18-29-year-olds only slightly more likely to use it than those aged over 60 years.
- However, they are also the most likely to feel they have experienced fake news daily in the last 1-2 years (39% compared to 21% on average).

Pakistanis feel mobile devices have enhanced their performance and quality at work...

• In the workplace, Pakistanis are among the most likely to feel that mobile devices have significantly improved their performance and quality over the last 1-5 years (47% vs a 35% average). They are also the most likely to feel that mobile devices have significantly improved their career and skills development over the same period (44% vs 30% overall), with females deriving greater benefits.

...But privacy and security, and digital skills gaps remain concerns

• While Pakistanis feel confident in their digital skills to get the most out of the online world, they are the most likely to express concerns over their ability to keep pace with future technological changes (51% vs 27% overall). They are also concerned that a skills gap could expose them to scams or security breaches.

• Privacy and security concerns pose less of a barrier to Pakistanis' ability to use their mobile devices to the fullest potential for work (32% vs 49% on average), in line with trends from 2022.
• They are also more likely than their regional counterparts to encounter fake news daily (39%, compared to 21% regionally).

Pakistanis are using their devices to optimise well-being and contribute to sustainability efforts

• To enhance their overall well-being, 29% of Pakistanis use their mobile devices daily for mental or spiritual well-being apps, higher than the overall average of 18%.
• 93% of respondents in Pakistan feel that their mobile device allows them to live more sustainably, much higher than the regional average of 72%. Pakistanis value the sustainable advantages offered by mobile devices, including reduced travel or commuting needs, decreased paper usage and increased access to education and information.

Philippines

Filipinos remain the most likely to be inseparable from their mobile devices

- Filipinos are most likely to have their mobile on them at all times, with 24% saying they are never without it, compared to the regional average of 14%. A slight reduction on 2022, when 29% indicated that they were never without their mobile device.
- 86% of Filipinos spend at least half their day using their mobile device compared to 73% on average.
- Filipinos feel that mobile use positively impacts their personal lives, with 49% saying they felt it had improved their relationship with family members, compared to the regional average of 39%.
- 83% of Filipinos believe they have achieved a healthy balance with their mobile use.This is higher than the regional average of 77% and second only to Indonesia (85%).

Many are using their device to acquire new skills…

- 51% of Filipinos feel very confident in utilising their digital skills to get the most out of the online world, compared to a regional average of 54%. However, they are also the most likely to be very concerned about not being able to keep up with future change, 40% say they are very concerned, significantly higher than the regional average of 27%.
- When it comes to using mobile devices to acquire new skills, most Filipinos hope to gain skills related to communication, such as learning a new language, at 65%, followed by photography skills at 59%, and video skills at 57%. 75% of Filipinos would use these skills to pursue an additional income stream.
- Almost one-third (31%) of Filipinos use their mobile device for educational purposes daily – greater than the regional average of 27%. Those aged 18-29 years are more likely to use their phones daily for this purpose compared to older cohorts.
- In the workplace, 39% of Filipinos feel that using mobile devices for work has significantly improved their productivity over the last five years. This compares to an average of 27%.

…But mobile privacy and security are top priorities for Filipinos

- Mobile privacy and security continue to concern Filipinos. 69% say they are very concerned, compared to the regional average of 44%. Phishing (73%) and data leakage (71%) emerge as the most prominent areas of concern.
- Filipinos are particularly worried about the impact of mobile privacy and security on vulnerable family members. 89% are concerned over the online safety of elderly family members, compared to an average of 77%. 94% are concerned about the safety of younger family members compared to 80% overall.

The sustainability practices of their mobile provider is important to Filipinos

- 76% of Filipinos are aware of the environmental impact of mobile phone usage, higher than the 68% average.
- 81% of Filipinos say that the sustainability practices of their telecoms provider are important in their choice of whether to use them or not, the highest in the region (70% on average).

Singapore

Younger Singaporeans expect to increase their mobile use in the next 1-2 years, driven by social interaction...

- Over a quarter (27%) of Singaporeans expect their mobile usage to stay the same in the next two years – the highest percentage of all the markets.
- However, 34% of respondents aged 18-29 expect their usage to increase in the coming years, significantly more than any other age group. This is expected to be driven by social interaction (70%) and work (67%).
- The same group also feel that mobile devices have significantly improved their relationships with family members, friends and partners or spouse.

But there is potential for an increase in mobile usage for work-related purposes in Singapore

- Only 58% of Singaporeans believe they are currently utilising their mobile device and its features to its fullest potential, compared to the average of 79%. This comes as almost one-third (32%) of Singaporeans acknowledge that mobile tech skills will give employees a competitive edge in the workplace and are concerned that they will be outdated.
- Singaporeans are also the least likely to attribute improvements in their performance and productivity at work to mobile devices. Only 18% acknowledged that mobile devices had significantly improved the performance and quality of their work, compared to 35% on average.
- Furthermore, only 14% believe mobile devices have significantly improved their career and skills development, compared to 30% on average.
- Almost 20% of Singaporeans felt their mobile had not contributed positively to their work-life balance, compared to only 7% of their regional counterparts.

Mobile devices do not feature highly as a means to learning new skills in Singapore

- Singaporeans are the least likely to use their phones to learn new skills. Only 67% say they have used their mobile device to do so in the last 12 months, compared to a regional average of 87%. They are also the least likely to use their mobile device daily for educational purposes – at 9% compared to the average of 27%.
- They are also least likely to feel they would like to use any skills gained through their mobile device to earn additional income (50% vs 67% on average).

Concerns remain over mobile security and particularly among elderly family members

- 92% of Singaporeans are concerned that the mobile skills gap could expose them to scams and security breaches. One in three (33%) Singaporeans say they experience an instance of phishing at least once a week.
- 84% of Singaporeans express concerns over online safety among elderly family members, compared to 77% on average.
- While 21% regionally report encountering online harassment or bullying at least once a week, this only happens to 15% of Singaporeans, the majority aged 18-29.

Singaporeans are less concerned about the environmental impact of their mobile use

- Only 50% of Singaporeans are aware of the environmental impact of their mobile devices usage, compared to 68% overall.
- Singaporeans are least likely to say that the sustainability practices of their telecoms provider is either important or very important in their choice of whether to use them or not (48% vs 70% on average).

Thailand

Thais are avid users of mobile devices and expect usage to increase further over the coming years

- 86% of Thais spend at least half their day using their mobile device compared to 73% on average.
- 83% of Thai mobile users expect their mobile device usage to increase in the next two years. More females (35%) than males (28%) expect this to increase significantly.
- The majority (78%) of users expect this to be driven by increased reliance on everyday online services and apps. Interestingly, 38% expect this to be driven by increased physical fitness and wellness use – higher than the regional average of 28%.
- Thai mobile users are more likely to feel frustrated than their regional counterparts when unable to

connect to the internet on their mobile device, at 55% – the highest percentage among all the markets, and higher than the regional average of 39%.

Mobile gaming remains a popular Thai pastime

- Thai respondents are the most likely to use their phone for gaming, with 44% saying they use their mobile device for this daily, compared to the average of 30%. This is distributed evenly amongst age groups.
- Males are more likely to use their mobile device daily for gaming at 48%, compared to 41% of females.

Over half of Thais have no concerns over keeping pace with future technological changes...

- 54% of respondents say they are not concerned about their ability to keep pace with future technological

changes – significantly higher than the regional average of 27%. Females are more likely to be concerned, with 50% saying they are at least somewhat concerned, compared to 42% of males.

...And many are using mobile devices to learn new skills

- Encouragingly, 91% of Thais have used their device to learn new skills in the last 12 months. They are the most likely to use their mobile device to gain communication skills (67%) for example new languages, followed by video skills (59%) and photography skills (56%).
- Thais are the least concerned about privacy and security on their phone, an outlier for a second year, with only 17% expressing serious concerns (44% on average).

🇻🇳 Vietnam

Work is expected to be a key driver for the growth in Vietnamese mobile device usage

- Only 9% of Vietnamese mobile users say they are never without their phone, lower than the regional average of 14%.
- Vietnamese mobile users are most likely to use their phone daily for social networking/messaging (71%), entertainment (66%), and email/communication purposes (55%)
- 61% of Vietnamese mobile users believe their mobile device usage will at least somewhat increase in the next 1-2 years, compared to 70% regionally. 80% of Vietnamese mobile users expect this increase to be driven by work.
- While the study shows that mobile users are utilising their phones to combat the cost of living crisis in

various ways, Vietnamese mobile users are more likely to use apps that track spending – 52%, compared to the regional average of 41%. They are also most likely to use their phones to monitor their energy use (37% compared to 28% regionally) and participate in shared economy services (38% compared to 30% regionally).

Many hope to acquire new skills, such as learning languages via their mobile device

- In terms of gaining skills through mobile device usage, 70% of Vietnamese mobile users hope to gain communication skills such as learning new languages – significantly higher than the regional average of 57%. Males are slightly more inclined to gain skills around generative AI than females, compared to females – 49% compared to 37%.

- The majority (92%) of Vietnamese respondents say their mobile device usage has at least moderately improved their work-life balance.
- Vietnamese mobile users tend to believe that their employers are missing out on revenue opportunities due to lagging use and application of mobile technology.

Ongoing concerns persist regarding privacy and security but they are less pronounced than 2022

- 34% are very concerned over the privacy and security of their mobile device, although this is a marked decline from the 46% reported for 2022.
- Privacy and security concerns are distributed evenly amongst age groups with top concerns being phishing and scams (44%), data leakage (41%) and spyware and ransomware, both at 35%.

- Those aged between 18-29 years tend to feel more strongly about privacy and security regarding mobile usage. Those above 60 are most likely to be most concerned about data theft (93%).

Vietnamese are willing to pay more for mobile plans which are more sustainable

- While over half (57%) of Vietnamese respondents say their mobile device allows them to live more sustainably, this is lower than the regional average of 72%. However, 60% of Vietnamese mobile users would pay up to 10% for a mobile plan that produces a substantially lower carbon footprint, compared to only 51% regionally.