

2024

# *Digital Lives Decoded Thailand*

Connecting to a smarter  
and safer digital life

 telenor asia | **GW.I.**



# Foreword



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Telenor entered Thailand in the year 2000, amidst the excitement of the new millennium. In 2023, the amalgamation of True and dtac created Thailand's leading telecom-tech company and was Southeast Asia's largest telco merger by enterprise value. Today, as a co-owner of True Corporation, we are marking 25 years of Telenor in Thailand and are pleased to present this edition of **Digital Lives Decoded Thailand**.

In its third year, this study focuses on how mobile connectivity is shaping smarter and safer lives in Thailand. The pace of digital transformation is nothing short of astonishing. This report underscores the dominance of mobile in Thailand and unpacks the sweeping influence of artificial intelligence (AI) on the everyday experiences of internet users in the country.

People in Thailand are among the most connected in Southeast Asia, with 99% accessing the internet through a smartphone. They have enthusiastically embraced a digital life. On average, Thai users spend nearly five hours online daily, higher than the Southeast Asian average of 4 hours and 35 minutes. Mobile phones are a gateway to

income streams, education opportunities and smarter, safer, and more connected communities. Three in four people already use AI tools in their daily lives on social media, entertainment and online shopping, and it is not slowing down. As AI use becomes further embedded into everyday life, people are generally positive about the social and economic impact this will have in the future.

This progress brings responsibility. Digital literacy and data privacy take centre stage in ensuring that technology empowers – not exploits. With the right tools and knowledge, we can navigate the digital world responsibly, fostering a safer, more inclusive online ecosystem.

I hope this report offers a snapshot into the digital behaviours and attitudes of people in Thailand, to guide policymakers, businesses, and individuals towards a safer and smarter digital future.

Together, we aspire to build a digital Thailand and use technology advancements to create a brighter, more connected future for all.

# *In this report*

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## Methodology

This report is based on a survey that Telenor Asia commissioned GWI to undertake in August 2024. Survey respondents were granted anonymity and Telenor's involvement was not disclosed.

GWI has a panel of **over 22 million internet users** globally. To ensure its research is reflective of the online population in each market, GWI sets appropriate quotas on age, gender, and education.

GWI's recontact methodology enables respondents who have completed its core survey within the last year to be recontacted to take additional surveys. This data can then be synchronised with the core data, which consists of over 57,000 data points.

All figures in this report are among internet users aged 16-64 in Thailand, and drawn from the following studies:

### **GWI Core**

- Conducted quarterly, with questions remaining the same wave-on-wave
- Q3, Q4 2023 and Q1, Q2 2024, N=17,573

### **Telenor's custom research**

- General population survey
- Using GWI's recontact methodology on the GWI core audience
- Fielded June 24<sup>th</sup> to July 13<sup>th</sup> 2024, N=1,002

**Generations referenced throughout are defined as follows in 2024:** Gen Z aged 16-27, Millennials – 28-41, Gen X – 42-60, Baby boomers – 61-64

# 2024 snapshot

## Mobile devices dominate Thai internet users' digital lives

Smartphone ownership is universal among internet users in Thailand (99%), with consistency across all demographics. 93% say their mobile is the most important device they use to access the internet. As of 2024, Thai internet users spend an average of almost **five hours** online daily via mobile devices: almost half an hour more than the Southeast Asian average (4:35). Although there has been a plateau since 2020, daily usage has increased by more than 50 minutes since 2016.

Thai internet users are also 37% less likely than the Southeast Asian average to own a PC or laptop, and 39% more likely to own just one device.

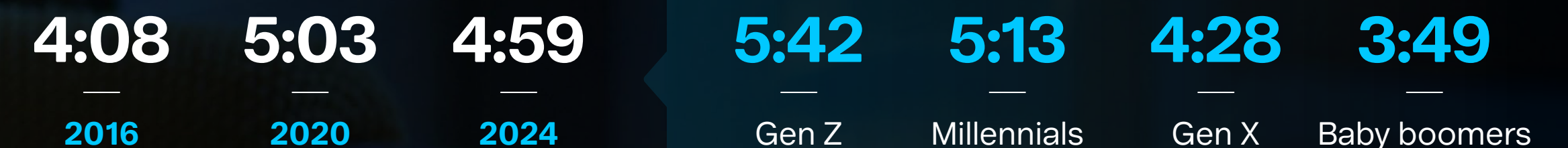
This further underscores the dominance of mobile in Thailand's digital landscape.

Looking at how behaviours are being shaped, it is clear mobile devices are not just communication devices, but a gateway to smarter, safer, and more connected lifestyles.

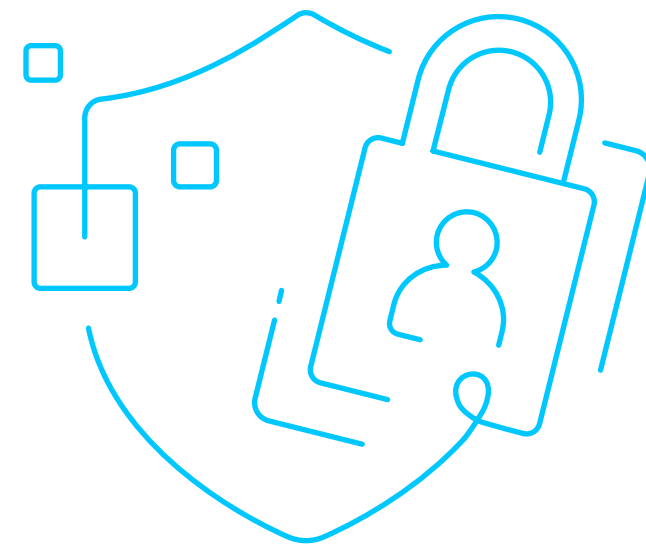
With the growing integration of AI into mobile devices, the importance of understanding cyber threats and maintaining strong security posture will become even more critical in protecting personal data and ensuring digital safety.

### Daily time

Time spent online via mobile daily (h:mm)



Source: GWI Core • Audience: Internet users aged 16-64



## Thai internet users are less concerned about data privacy risks than regional peers

In the face of digital evolution and increased awareness of online security, personal data privacy continues to be top of mind in Thailand.

75% of respondents feel they lack control over their personal data online, a higher proportion than the Southeast Asian average (68%). In spite of this, Thailand is the least likely market in Southeast Asia to worry about how companies use their personal data online, with only 1 in 4 expressing concerns in 2024. This figure has remained stable over the last five years.

With Thailand internet users falling behind Southeast Asian counterparts for feeling in control of their data, but also in being concerned about its use, there is clearly an opportunity to empower and educate its internet population on the importance of data privacy.

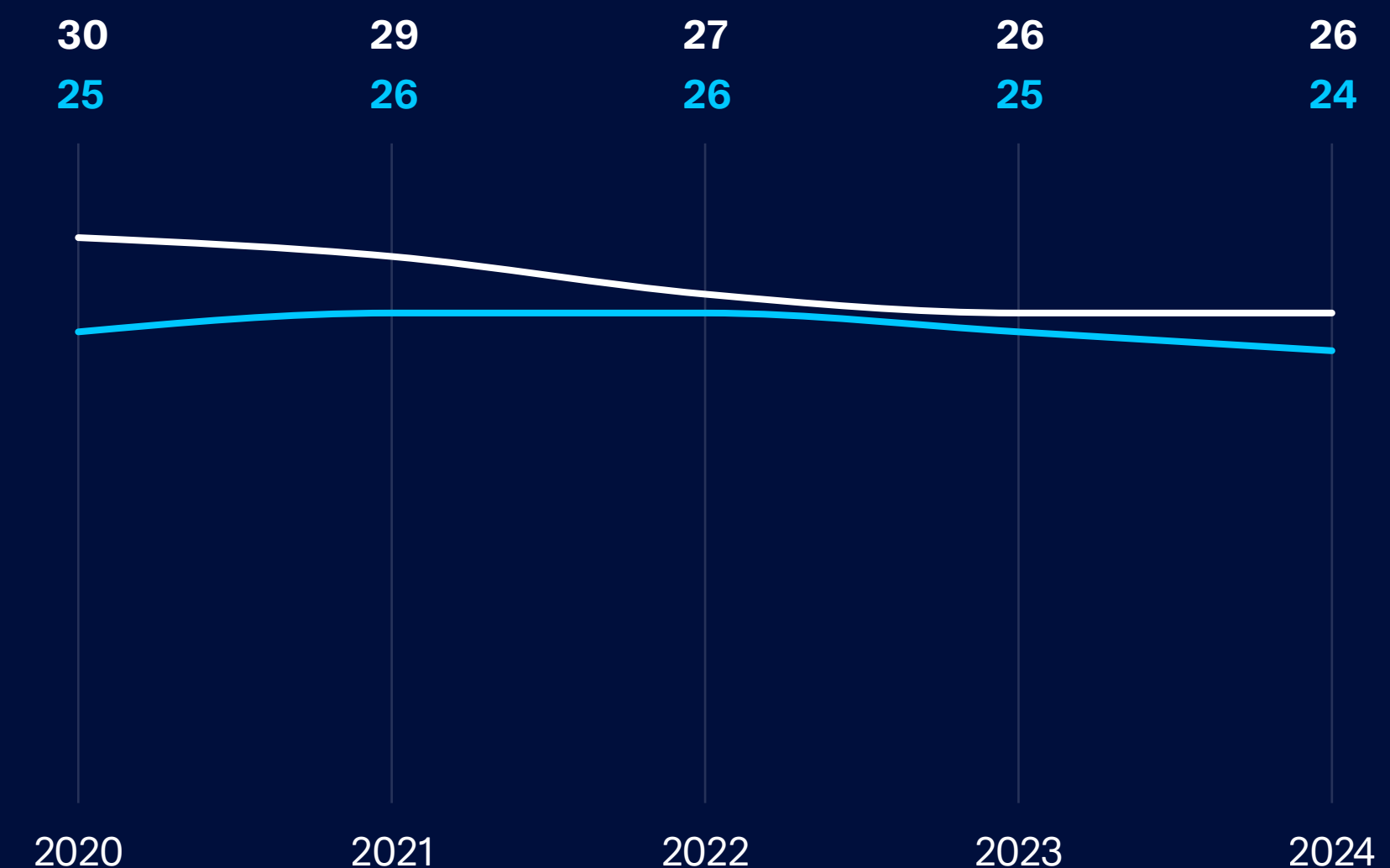
38% of baby boomers (70-78 yrs of age) say they worry how their personal data is being used, versus 23% of Gen Z (12-27 yrs of age). This explains why the oldest generation is the most likely to want brands to be transparent about how they collect and use data, with over half (54%) baby boomers saying so, versus just 36% of Gen Z.

# 1 in 4 worry about how companies use their personal data

## Attitudes to online privacy

% who say the following describes them

- I feel in control of my personal data online
- I worry about how companies use my personal data online



Source: GWI Core • Audience: Internet users aged 16-64

28% 23%

Gen Z

26% 20%

Millennials

23% 27%

Gen X

29% 38%

Baby boomers

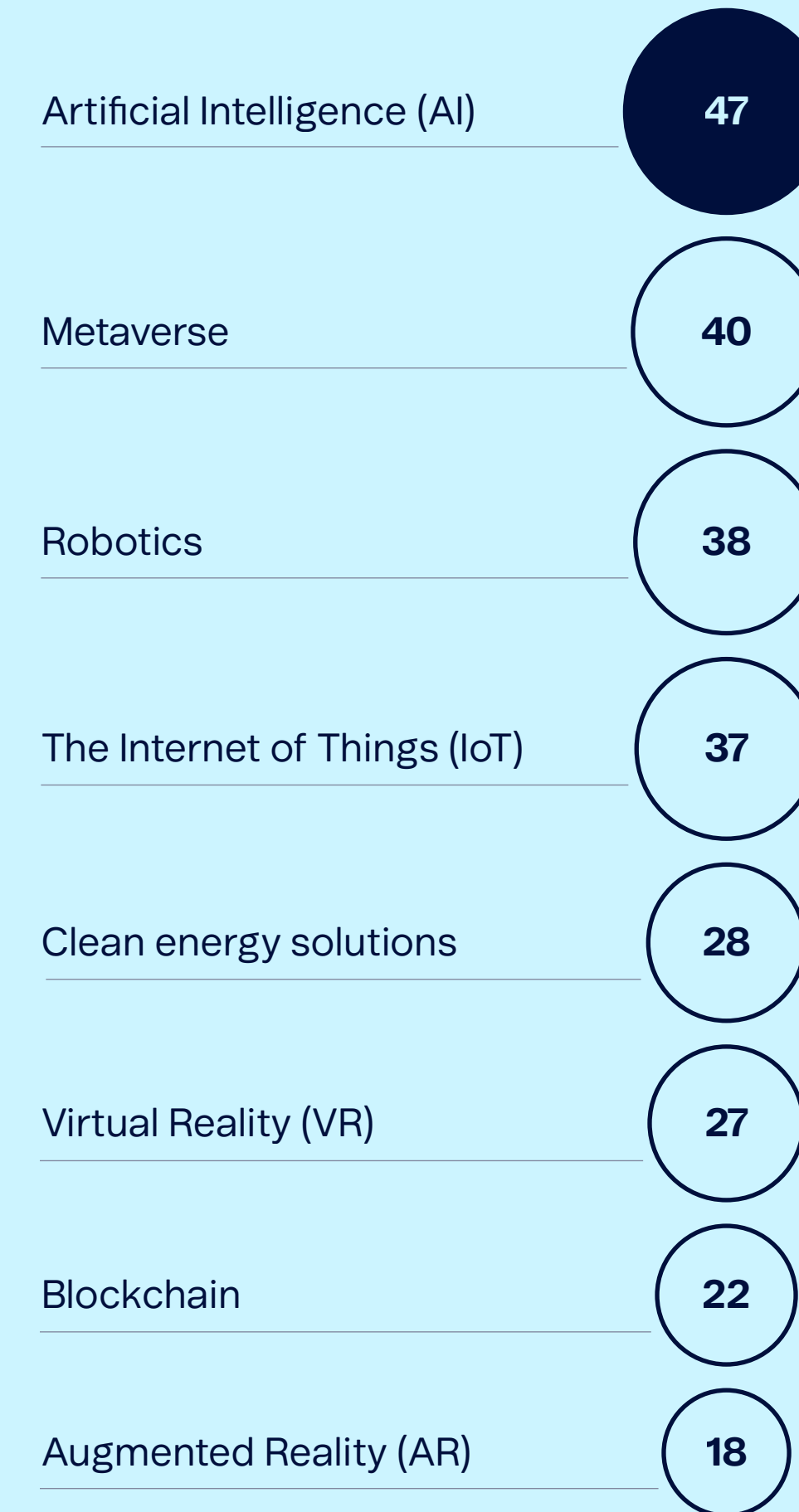


## AI is making its mark in Thailand, but views on its impact are divided

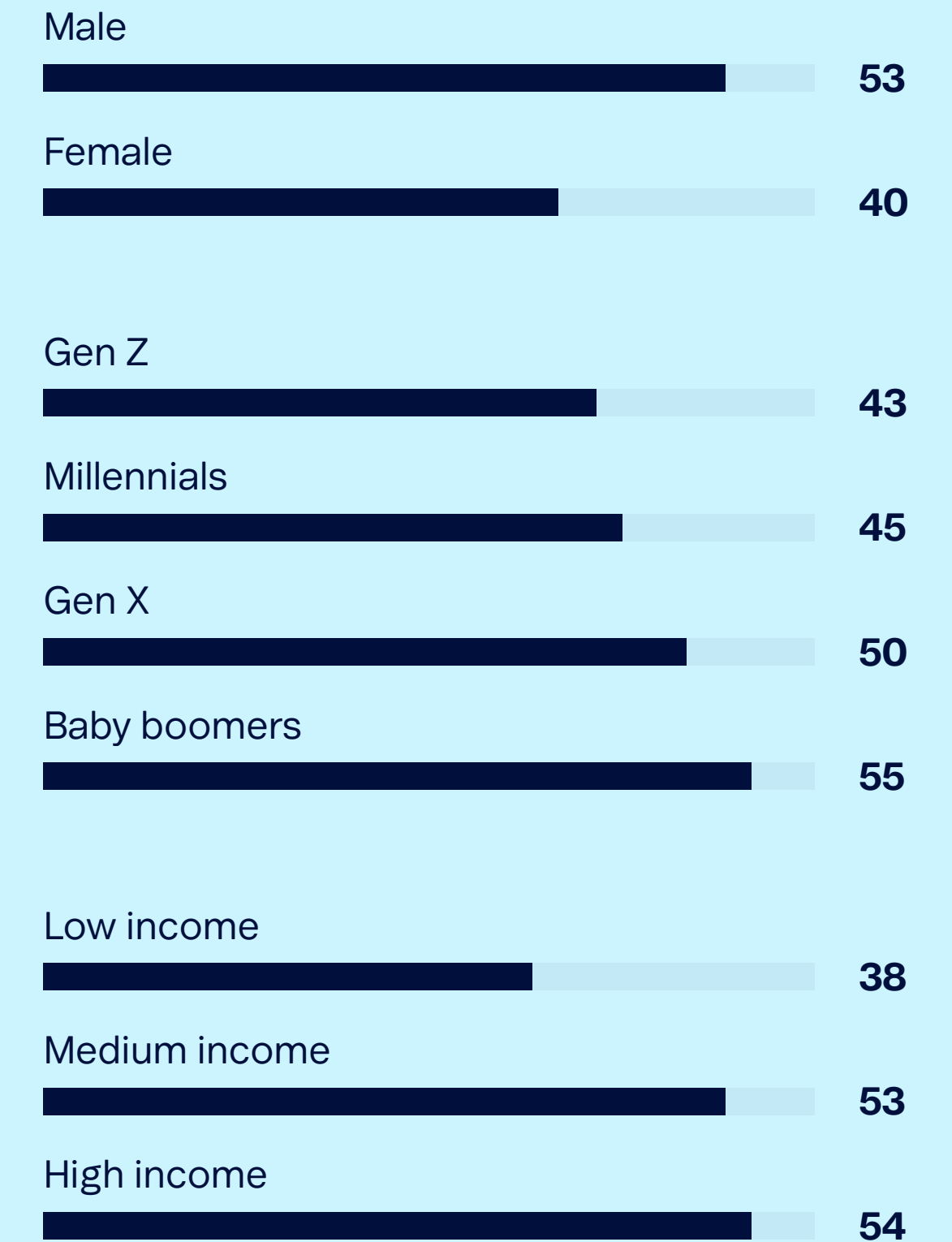
When looking at attitudes towards emerging technologies, nearly half of internet users say they are most excited by AI. This excitement is highest among males (53%), baby boomers (55%) and high-income consumers (54%).

## Excitement for emerging technologies

% who are excited about these technologies



### AI excitement by demographics



Source: GWI Core • Audience: 17,573 internet users aged 16-64

# *Living a smarter and safer digital life*



## How mobiles help daily life

% who say their mobile phone has been helpful or unhelpful in the following areas of life

● Extremely helpful ● Helpful ● Unhelpful

Keeping up to date with the latest news



Keeping you entertained



Teaches me new skills



Career



Keeping me safe



Social life

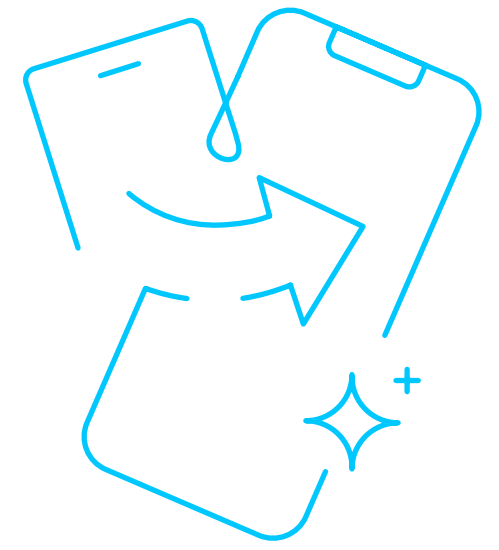


Work-life balance



Source: Telenor study • Audience: 1,002 internet users aged 16-64

## Mobiles are helping people in Thailand to live a smarter life



Greater and quicker access to information, enhancing navigation and connectivity, boosting productivity and supporting general well-being are some of the ways the mobile phone has enabled people to live a smarter life.

### Entertainment

Over 4 in 10 said their mobile has been 'extremely helpful' for staying entertained, with over 1 in 4 watching short form videos or browsing their social media feed on their mobile phone first thing in the morning. Among those who say the benefits of a mobile outweigh the risks, 1 in 2 say this is because they can access streaming videos, play games and listen to music – more than those who cited productivity and other functional benefits.

### Financial management

Despite the sensitive nature of financial information and risks that come with it, 6 in 10 say that contactless payments and mobile wallets help them to live a smarter life. 6 in 10 also appreciate access to online banking and managing finances on their mobile phone.

### Access to information

Over half say that being able to search for quick answers and solutions has enabled them to live a smarter life, with instant access to news and online learning among the top reasons. Among those who view the benefits of mobile devices outweighing the risks, easy access to information, communication and services anytime/anywhere is the second most cited benefit.

### Social connectivity

Mobile phones have significantly improved social connectivity. Over 1 in 4 find them extremely helpful for their social life, while 4 in 10 say mobiles enable a smarter life through connecting them with like-minded individuals online. The ability to stay in touch with others is regarded as the top benefit of mobile phones.



## Ways mobiles are allowing smarter lives

% who say their mobile phone has allowed them to live a smarter life in the following ways



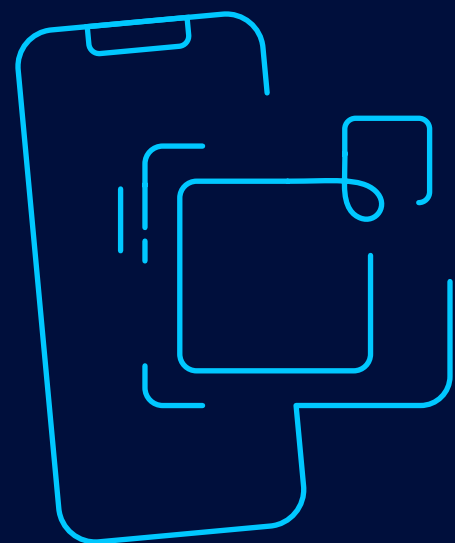
Source: Telenor study • Audience: 1,002 internet users aged 16-64

## Reasons mobile benefits outweigh the risks

% who say this is why the benefits of a mobile phone outweigh the potential risks



Source: Telenor study • Audience: 966 internet users aged 16-64



## People feel safer IRL (in real life) with their mobile

The impact of the mobile phone on personal safety is generally positive. Over 1 in 3 report feeling safer with a mobile phone, particularly men and younger users. Conversely, only 8% feel less secure with their mobile, despite the acknowledged risks of cyber threats and security concerns.

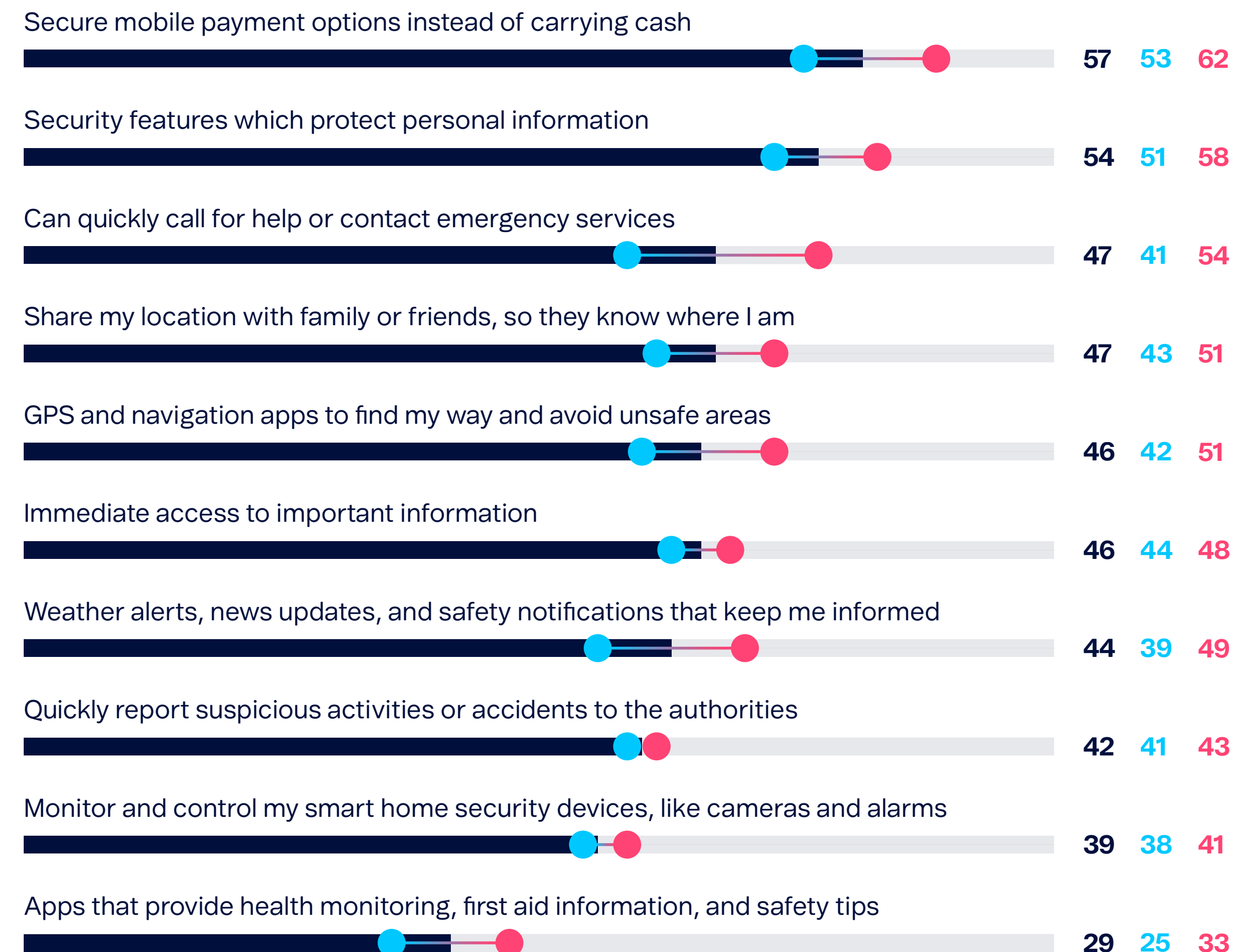
Secure payments contribute significantly to the safety benefits afforded by the mobile phone. Among those who feel safer with their mobile phones, the top reasons were due to secure mobile payment options instead of carrying cash and security features like fingerprint or facial recognition. Both were more important than contacting emergency services, which was the top benefit cited by internet users in Singapore and Malaysia.

Women are also more attuned to the safety benefits than men, especially on the ability to quickly call for help or contact emergency services.

## Reasons mobile makes them feel more safe

% who say this is why their mobile phone makes them feel safer

● All ● Male ● Female



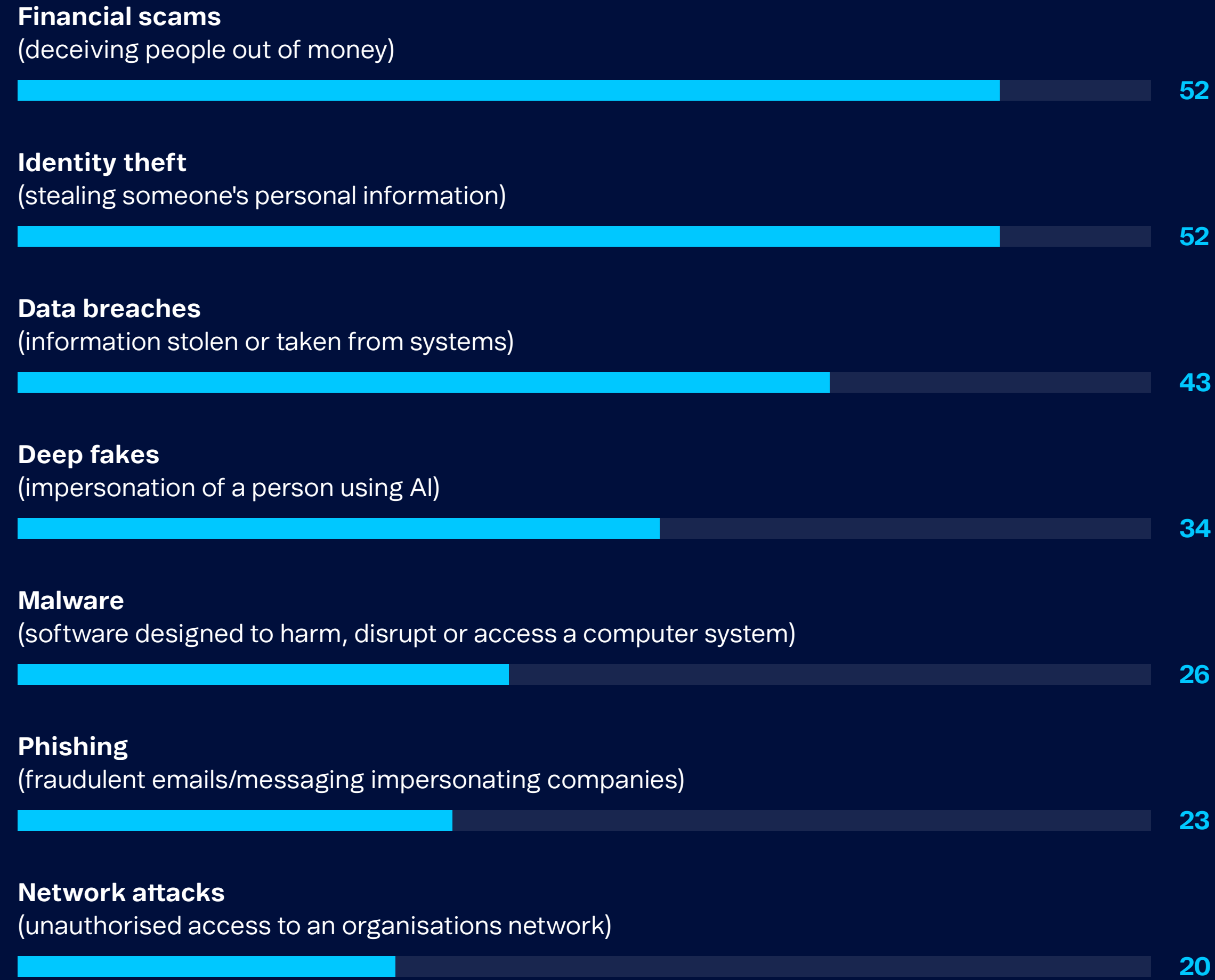
Source: Telenor study • Audience: 366 internet users aged 16-64

# *Scams and improving security posture*



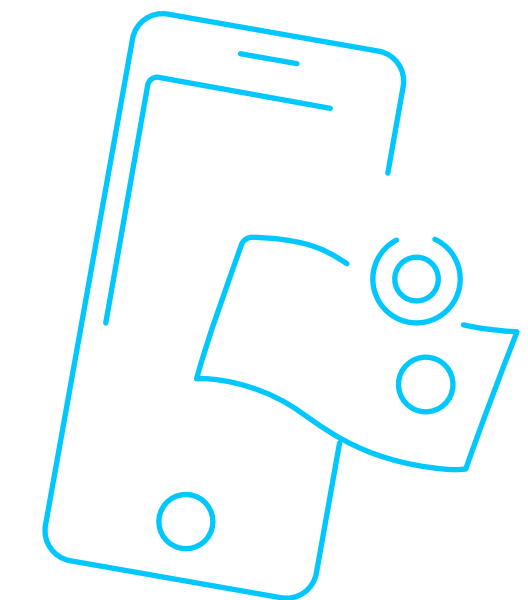
# Cyber threat concerns

% who say these are top concerns with new technology like generative AI and IoT



Source: Telenor study • Audience: 1,002 internet users aged 16-64

## Financial scams and identity theft are the top concerns in Thailand



8 in 10 Thai internet users frequently worry about the security of their online accounts, with over 1 in 2 worrying about financial scams and identity theft. These concerns increase with age but are also primarily present among urban-suburban and middle-high income groups. Low-income earners and rural dwellers are less likely to worry about either.

On the flip side, phishing is a less significant concern here than elsewhere in the region. 1 in 4 in Thailand are concerned about phishing, versus a third of internet users in Singapore and Malaysia.

94% of internet users in Thailand employ at least one privacy measure, yet fewer are using online privacy measures than they were in 2020, with the proportion of those using private browsing mode (-25%), ad-blockers (-29%) and VPNs (-55%) declining in the last four years (2024 vs 2020).

# Thai respondents worry about online security but continue to trust in websites

## Privacy tools used

% who use the following online privacy options

**94%**

At least one privacy measure

**77%**

Read privacy notices

**70%**

Clear browsing history/cache

**64%**

Use a private browsing mode or window

**49%**

Decline consent to provide further contact

**47%**

Decline cookies on websites

**47%**

Unsubscribe/opt out of lists

**36%**

Use an ad-blocker

**33%**

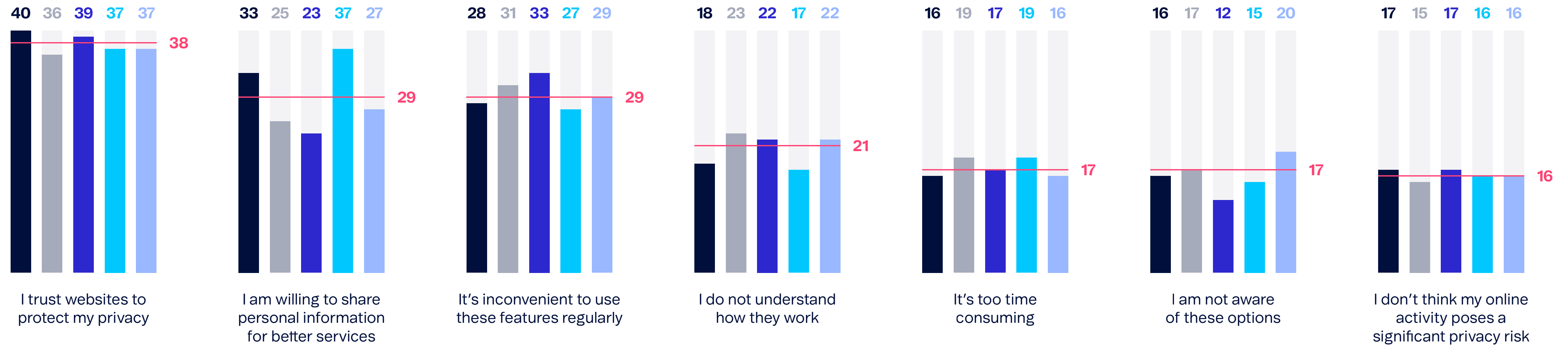
Use a VPN

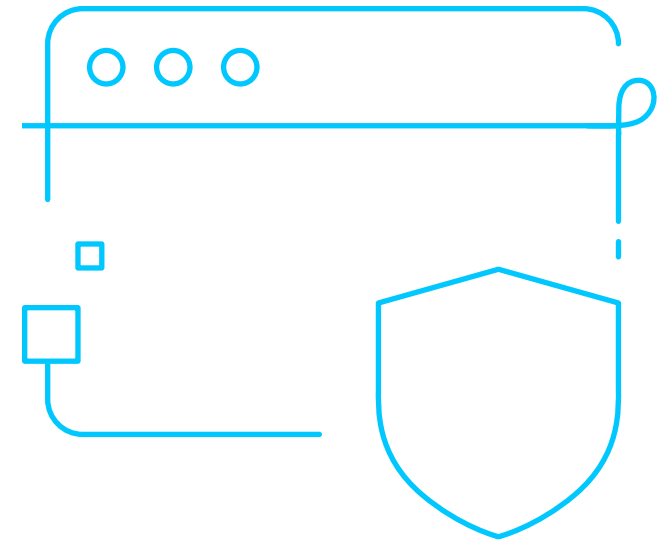
## Reasons for not taking action

Among those who do not take one or more privacy actions, % who say this is why

Source: Telenor study • Audience: 895 internet users aged 16-64

● All ● Male ● Female ● Gen Z ● Millennials ● Gen X and baby boomers





Only a third use VPNs, declining to 3 in 10 among women and 25% of Gen X/baby boomers. Those who don't use ad-blockers or VPNs are significantly more likely than average to say they don't take online security measures because they don't understand how they work.

Among those not utilising privacy tools, the top reason is trusting websites to protect their privacy: 38% in Thailand said this, compared to just 21% in Singapore. In fact, 3 in 4 trust the security measures of the websites they use frequently, with half not declining cookies or consent to provide further contact, rising to around 60% of older generations.

Even though internet users worry about security of their online accounts, they feel confident in their ability to protect personal information online and trust websites to protect their privacy.

This underscores the need for greater awareness on the risks involved in sharing information online, as well as education on privacy tools. Investing in training could bolster people's confidence in protecting themselves against the sophisticated scams.

## Data privacy attitudes

% who agree with the following statements

● All ● Male ● Female ● Gen Z ● Millennials ● Gen X & baby boomers

Frequently worry about the security of my online accounts



Find it challenging to stay informed about the latest online security threats



Feel confident in my ability to protect my personal information online

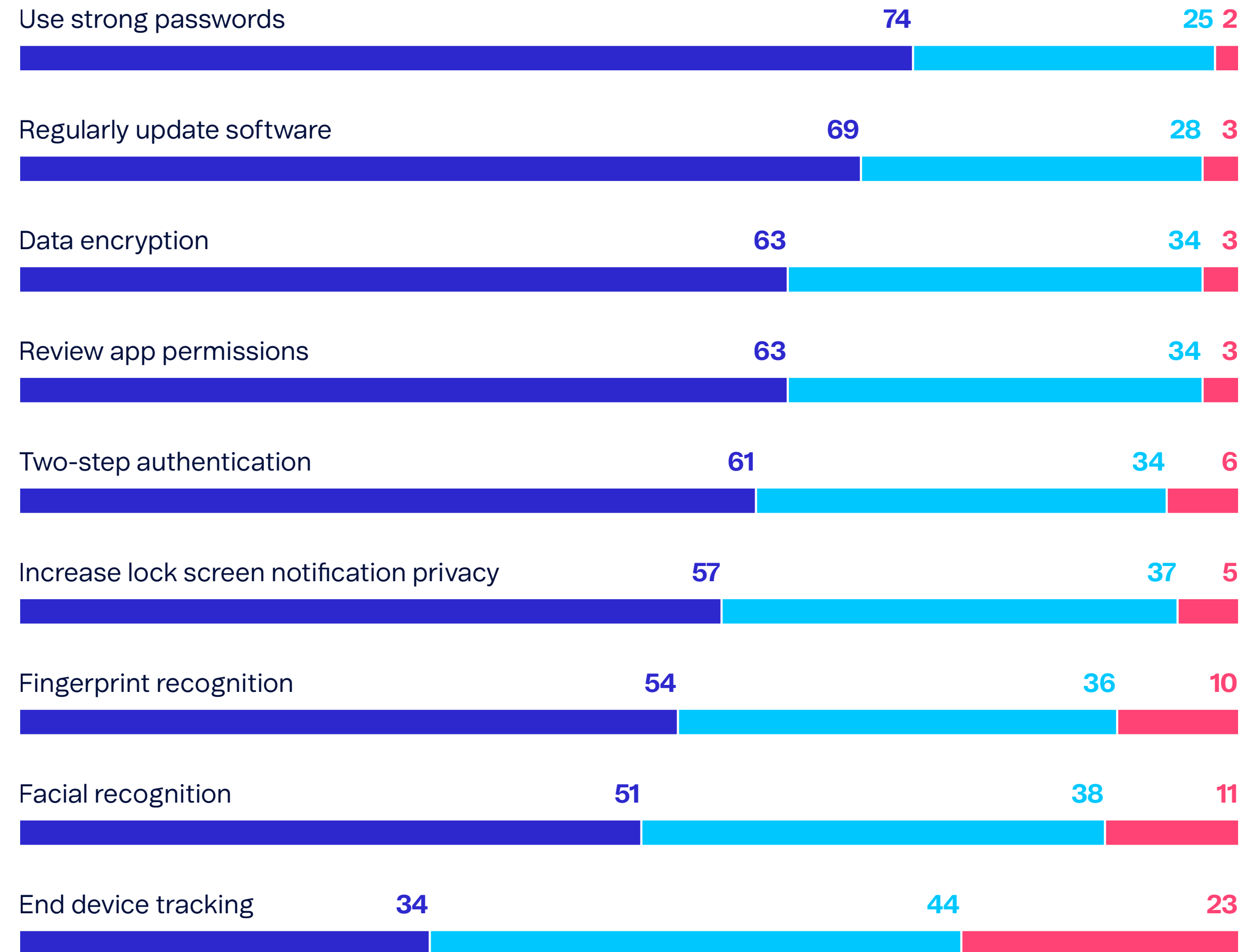


Source: Telenor study • Audience: 1,002 internet users aged 16-64

## Improving security posture

% who say the following with regards to improving the security on their mobile phone

● Currently doing ● Intend to do ● Will not do



Source: Telenor study • Audience: 1,002 internet users aged 16-64

## The privacy paradox – to share or not to share?



The trusting nature of Thailand’s internet users continues to be evident in the steps they are reluctant to take for mobile security. 23% said they will not end device tracking on their mobile phone – this security feature attracting significantly more resistance than others.

Additionally, around 6 in 10 would give permission to companies to access their personal data in exchange for personalized offers/services, and 58% give permission to social media apps in exchange for usage of AI photo enhancers/AI filters. This highlights the common privacy paradox: people are concerned about tracking yet are unwilling to give up the daily conveniences that come from allowing technology to track them.




## Rural dwellers feel less confident online

Rural dwellers feel less confident online than their urban counterparts: only two-thirds feel confident in their ability to protect their personal information online, versus 73% of those living in cities. While they are more likely than urban-dwellers to take several security measures, including using VPNs and ad-blockers, they fall behind on security posture on their mobile phone, being around 20% less likely than average to use data encryption or regularly update software.



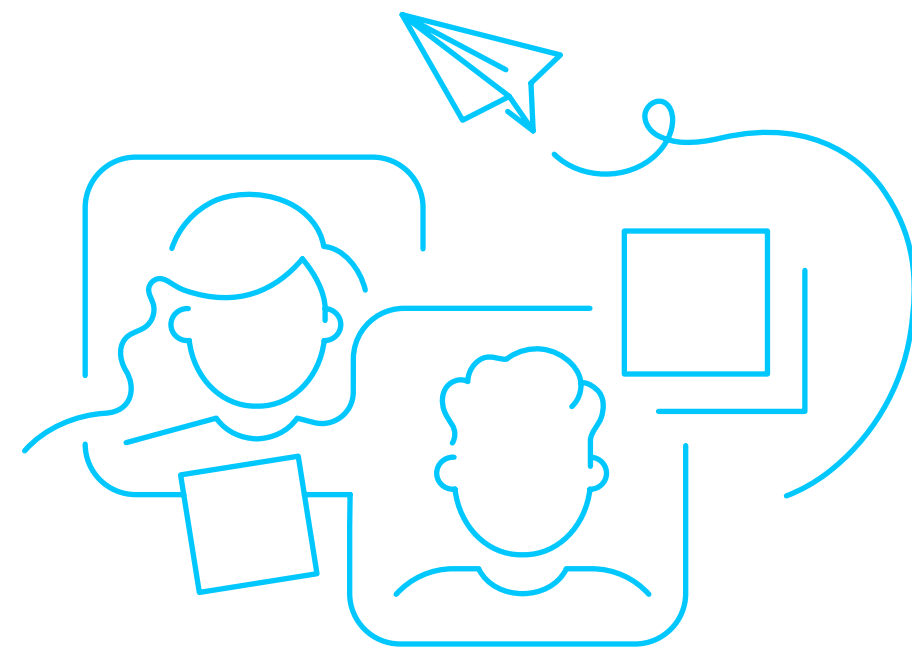




Despite privacy concerns, people are unwilling to give up the daily conveniences that come from allowing technology to track them

# ***Navigating AI perceptions and impact***





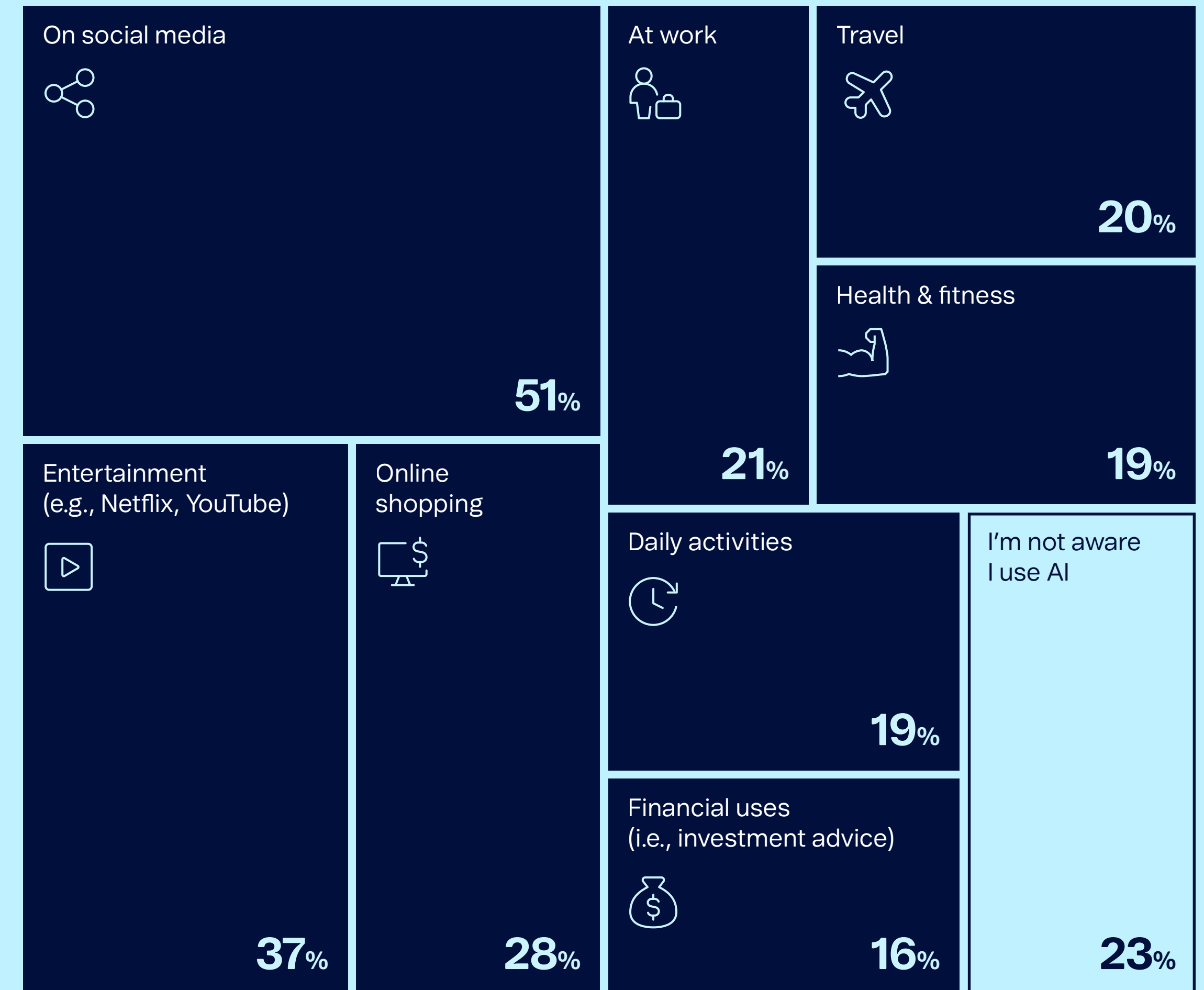
## AI is generally perceived positively in Thailand

The enthusiasm for AI in Thailand is clear, with more than 3 in 4 respondents already using AI tools. Entertainment is the key arena, with more than 50% using AI on social media and close to 40% on streaming apps. Around 8 in 10 believe AI will have a positive impact on these areas of society (social media and the arts).

Around half of the respondents trust AI-generated information a lot or completely, especially educational content. However, financial advice sees the greatest scepticism.

## Usage of AI tools

% who use AI in the following situations

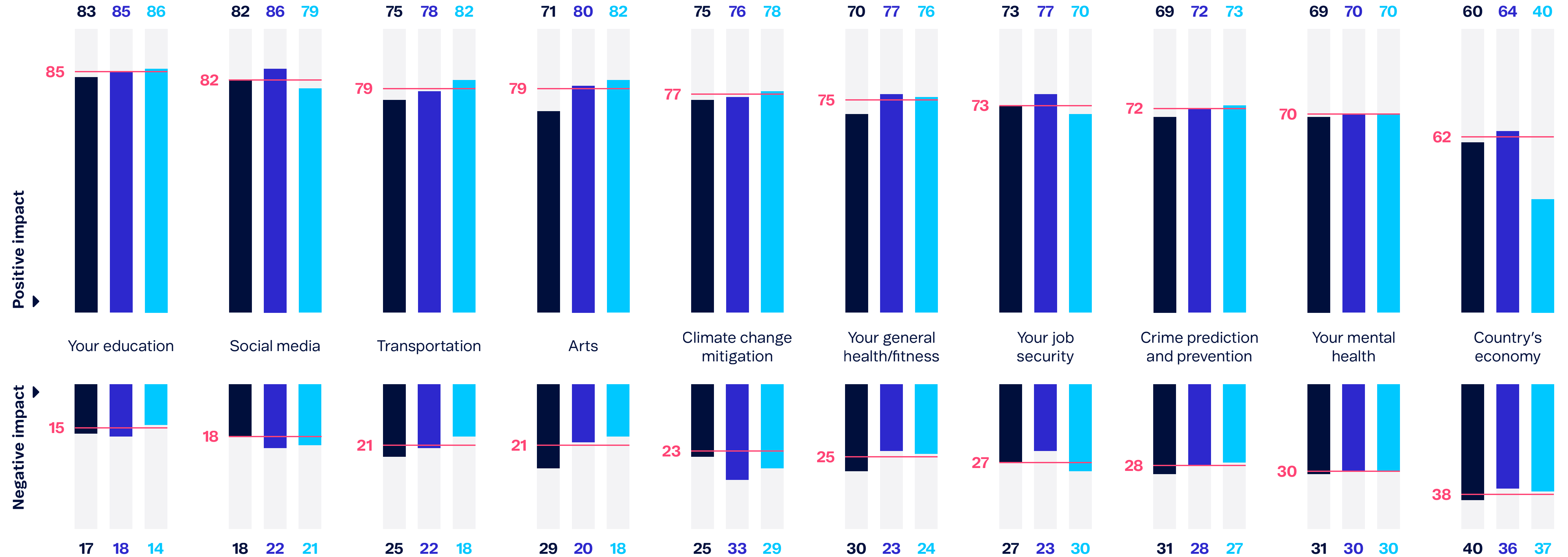


Source: Telenor study • Audience: 1,002 internet users aged 16-64

# Future impact of AI on society

% who think AI will have a positive/negative impact on the following

● All ● Gen Z ● Millennials ● Gen X and baby boomers

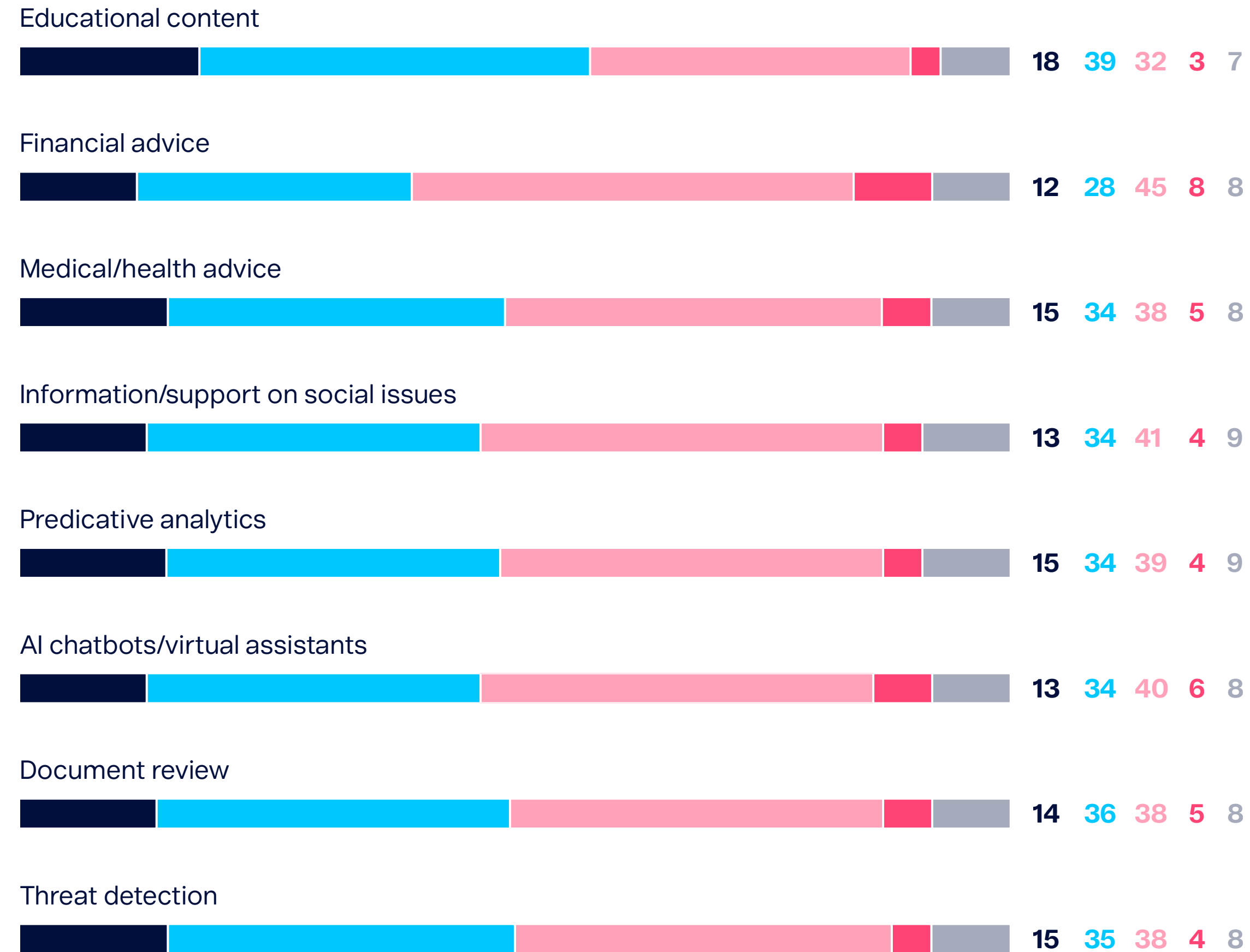


Source: Telenor study • Audience: 1,002 internet users aged 16-64

# Trust in AI-generated information

% who say they trust AI-generated information related to the following to this extent

● Trust completely ● Trust a lot ● Trust a little ● Don't trust ● Don't know



Source: Telenor study • Audience: 1,002 internet users aged 16-64



# AI is already transforming education, but has some way to go in the workplace

## AI as an educational tool

85% believe that AI will contribute positively to their education, surpassing anticipated benefits in other areas such as transportation, the economy and consumer health.

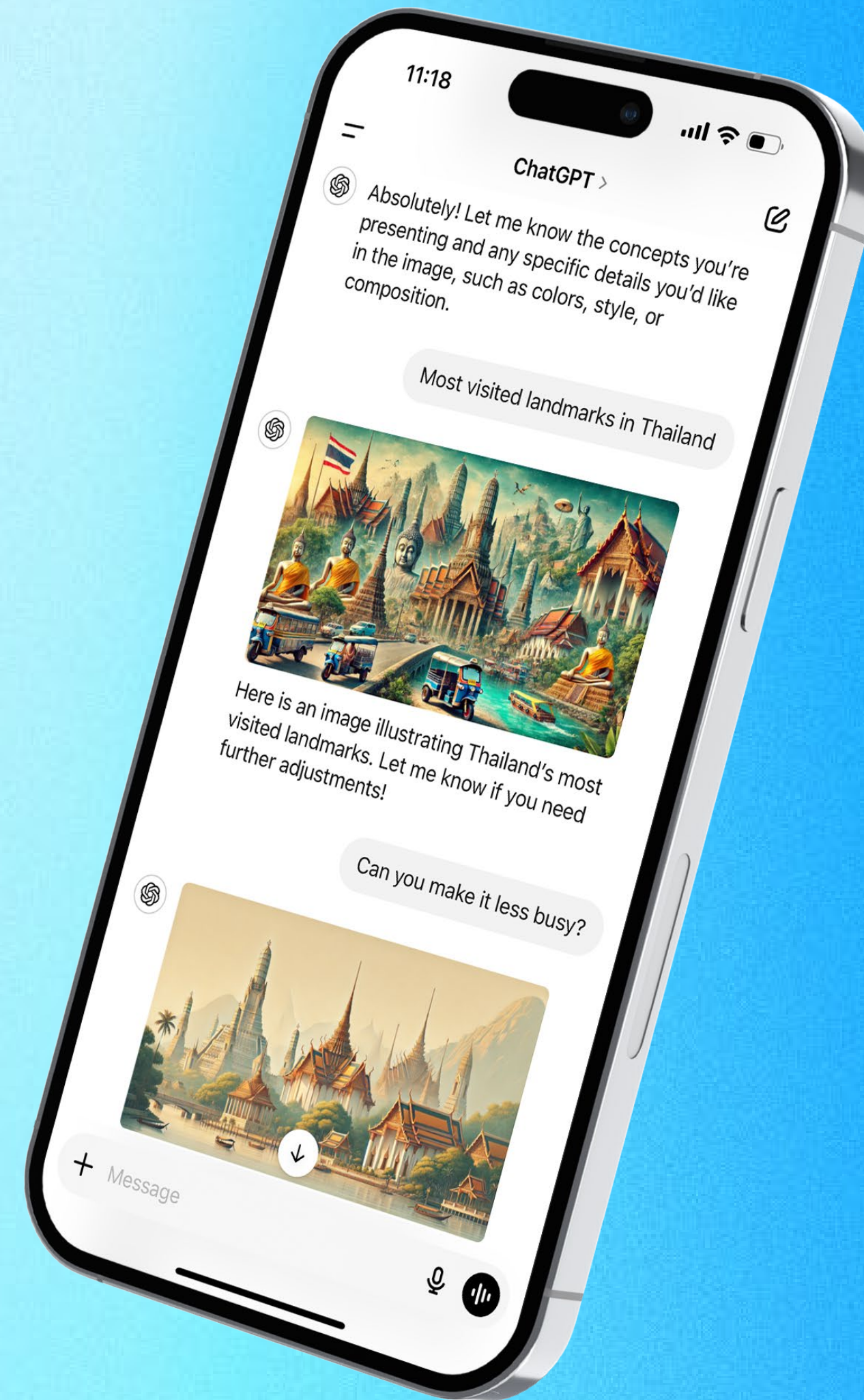
Gen Z tend to be especially trusting, with almost 7 in 10 trusting educational content a lot/completely, versus half of older generations. This trust signals the potential for AI to play a pivotal role in revolutionising education, making it more accessible and adaptable to different learning needs.

## AI in the workplace

Thailand is currently lagging behind other Southeast Asian markets for using AI in the workplace, with only around 1 in 5 using AI for work (versus over a third in Malaysia and Singapore).

However, those who use AI at work are 13% more likely than those who do not to believe it will have a positive impact on their job security. They are also 43% more likely to trust AI-generated information, especially from AI chatbots.

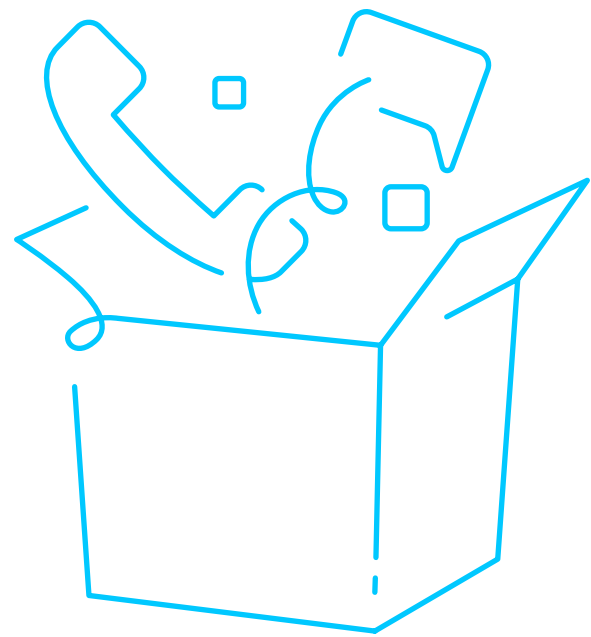
High-income earners are 21% more likely to be using AI at work. Additionally, they tend to hold a more optimistic view of AI's impact on society. As AI adoption increases in the workplace, it is expected to have knock-on effects on other areas of society.



**Almost 6 in 10 trust AI-generated educational content a lot or completely**

**1 in 4 feel negatively about the impact of AI on job security**

# Nearly 1 in 2 worry about AI integrated devices misusing personal data



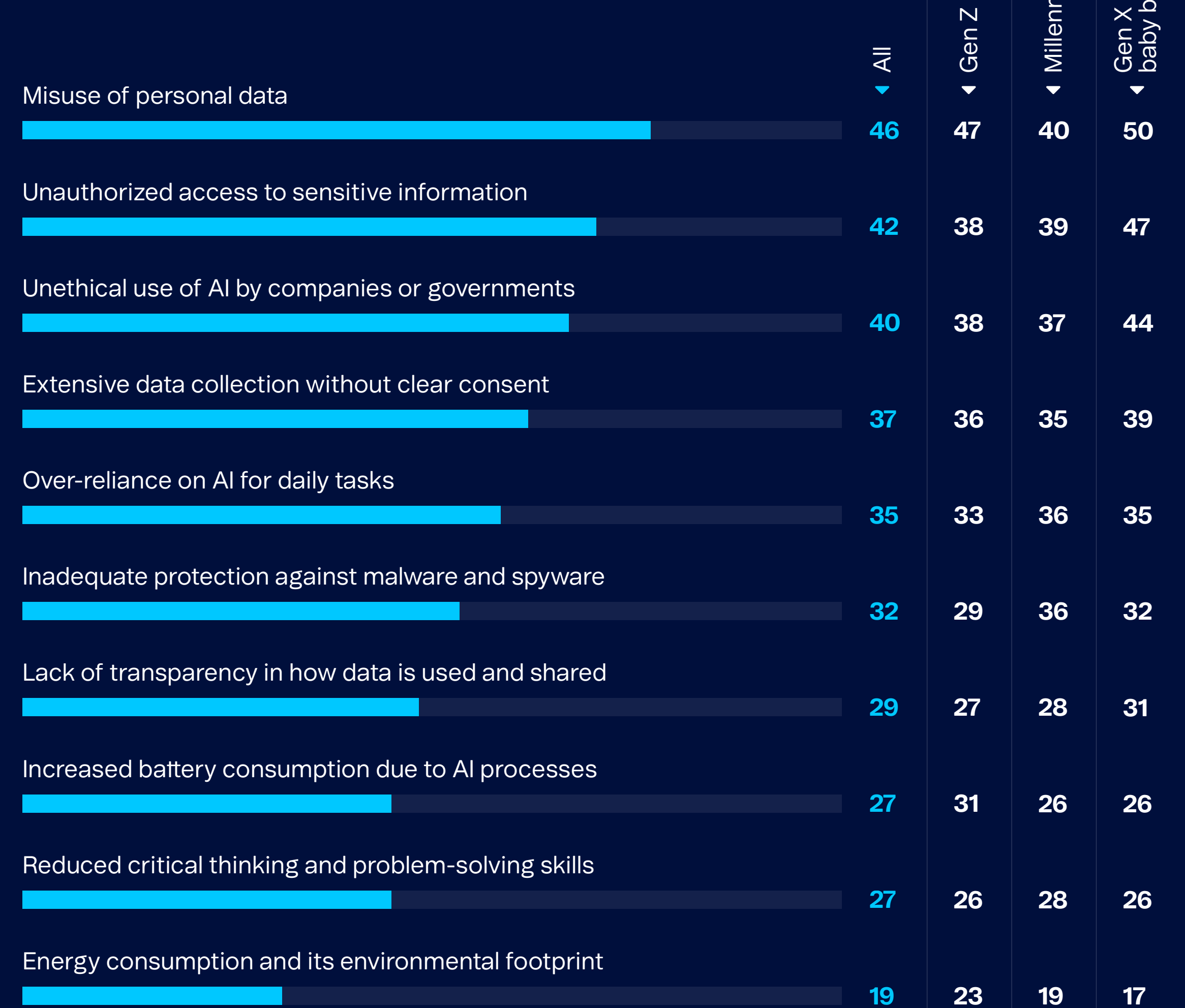
## Misuse of personal data is the top AI fear among older, affluent groups

The new era of AI-integrated mobile phones is transforming user experience – automating tasks and hyper-charging personalisation. To make that work, increasing amounts of data from the user will be harvested.

It is no surprise then that misuse of personal data is the top concern among Thai respondents regarding AI-integrated devices, with 46% worrying about this. However, fears around AI-integrated devices are more muted in Thailand than in Malaysia and Singapore.

## AI smart device fears

% who have the following concerns around AI smart devices

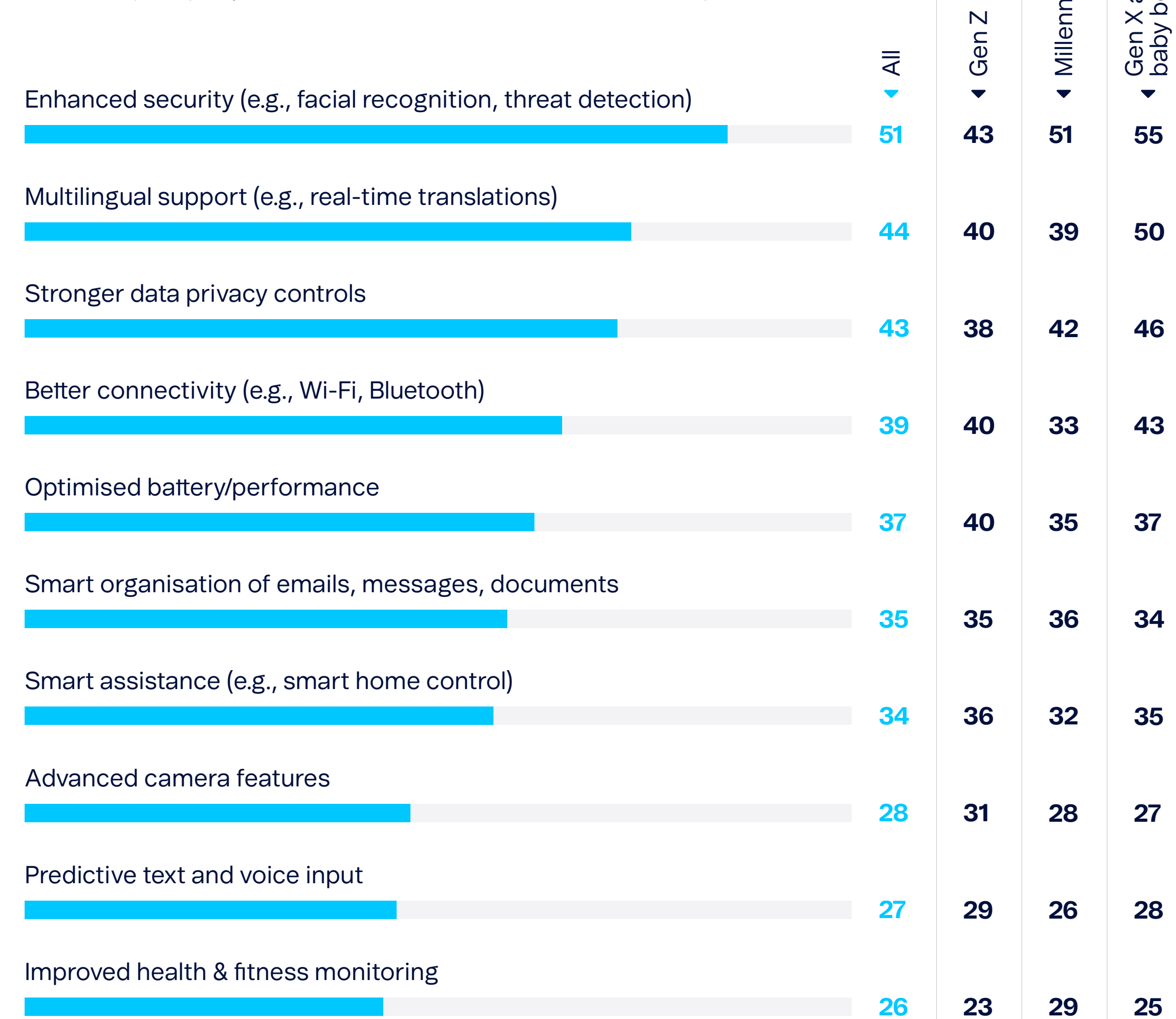


Source: Telenor study • Audience: 1,002 internet users aged 16-64



## AI smart device expectations

% who say they expect an AI smart device to do the following



Source: Telenor study • Audience: 1,002 internet users aged 16-64



# 1 in 2 expect an AI smart device to provide enhanced security

## Anxiety and expectations are generational

Gen X and Baby Boomers are more concerned and worried about AI's general misuse of data, including unauthorized access to sensitive information and unethical use of AI by companies or governments. It is unsurprising then that these generations are more likely to expect enhanced security and stronger data privacy controls from an AI smart device.

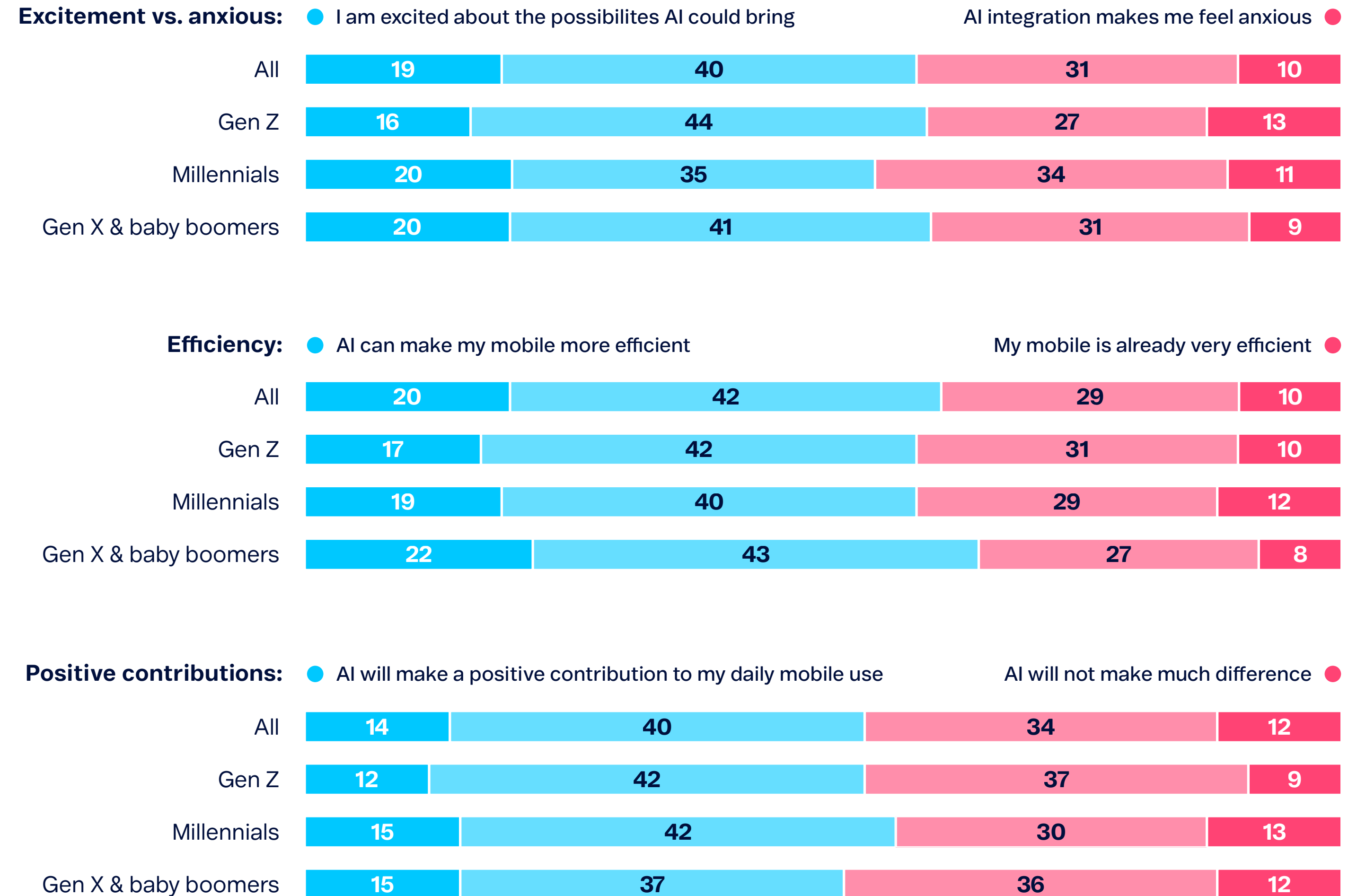
In comparison, Gen Z expect AI-smart devices to have optimized battery/performance, smart assistance and advanced camera features. They are less likely than the Thai average to worry about inadequate protection against malware and spyware and unauthorized access to sensitive information. This reflects their concerns or lack thereof.

Those who worry about their data privacy when thinking about AI integrations tend to also say AI will make their device more efficient (72%) and to be excited about the new possibilities AI could bring (67%).

This highlights another paradox: while people have data concerns, they still recognise the significant benefits AI can offer. Concerns do not necessarily decrease enthusiasm, and addressing fears could increase future adoption.

## AI attitudes

% who say the following with regards to these statements (4-point scales)



Source: Telenor study • Audience: 1,002 internet users aged 16-64



## Women need more convincing of AI benefits

Women are more likely than men to say AI integration makes them feel anxious rather than excited (46% vs 37% of men). They are also less likely than men to trust all types of AI-generated information, and more likely to think AI will have a negative impact on all aspects of society.

A general lack of confidence with new technology is likely to be a key driver behind this; women are 78% less likely to be confident versus men (38% vs. 49%, GWI Core Survey). Men are also 32% more likely to follow the latest tech news (GWI Core Survey), and therefore likely to be familiar with AI and its potential benefits.

To address this disparity, focusing on how AI can enhance mobile experiences in ways that resonate with women's specific needs and interests could be crucial in shifting perceptions and increasing their enthusiasm.



# Conclusion

As we reflect on the insights from the **Digital Lives Decoded 2024 Thailand** report, it is clear that the digital landscape in Thailand is rapidly evolving, driven by the widespread adoption of mobile technology and the transformative potential of artificial intelligence (AI).

The report paints a vivid picture of a nation powered by mobile technology and the transformative potential of AI. To fully embrace this momentum and tackle the challenges ahead, there are three areas where individuals, institutions and government can deepen efforts to create a safer online experience.

First, build trust. Enthusiasm for AI among Thai users, particularly in areas such as social media, entertainment, and

online shopping, underscores its potential to create smarter, safer, and more connected communities.

However, the report also reveals a divide in trust towards AI-generated information, particularly in financial advice. To address this, it is crucial to foster greater transparency and build trust in AI technologies through education and robust data privacy measures. True Corporation's AI Charter offers one example of how corporates can help build trust in AI by committing to the ethical use of this technology.

Second, educate all. While Thai users express high levels of concern about data privacy, they prioritise convenience over these concerns and are less worried

about how companies use their personal data compared to regional peers. There were also interesting discrepancies in the level of concern shown by different income brackets, with those earning less indicating much less concern around data privacy issues. To prepare for this future, it is essential to invest in digital literacy, to ensure that all users can make informed decisions about their online footprint.

As Thailand moves into the 5G and AI era, AI emerges as a significant driver of innovation and efficiency across various sectors. By embracing AI and integrating it into key sectors such as manufacturing, healthcare, and finance, Thailand can cement its position as a leader in the digital economy and drive sustainable economic growth.

Third, encourage digital responsibility. By equipping individuals with the knowledge and tools to navigate the digital landscape safely and effectively, we can help them harness the benefits of emerging technologies. Fostering a culture of digital responsibility and promoting best practices in data privacy and security will be key to building a safer and more inclusive digital environment.

By prioritising education, awareness, and holding high standards around responsible technology, we can create a more secure digital landscape and empower Thais to thrive confidently in the digital age.

