

THAI DIGITAL GENERATION SURVEY

What the post-pandemic world means for Thailand

By Sea Insights
September 2021



About Us

About the Company

Sea Insights is Sea's research and public policy unit. Its mission is to develop a deeper understanding of the rapidly evolving digital economy in Southeast Asia and Taiwan. Its research aims to inform leaders, from both the private and public sectors, on critical policy and strategy matters facing the digital ecosystem in the region.

Sea is a leading global consumer internet company. Sea's businesses include Garena, a leading global online games developer and publisher, Shopee, the largest pan-regional e-commerce platform in Southeast Asia and Taiwan, and SeaMoney, a leading digital payments and financial services provider in Southeast Asia.

Authors

Santitarn Sathirathai, PhD

Group Chief Economist
santis@sea.com

Michael Wan

wanm@sea.com

Lam Zhao Yao

lamzy@sea.com

Semi Kang

kangsm@sea.com

Nathan Chaniago

chaniagon@sea.com

Crystal Liu Jiquan

liucjq@sea.com

Bradford Loh

lohbrad@sea.com

Source

These findings are based on the 2021 ASEAN Youth Survey done in collaboration with the World Economic Forum. This year, we reached close to 86,000 people through our Garena and Shopee platforms as well as social media channels.

In this special edition of our study, we broadened our survey to include the digital workforce, people aging 16-60 who have some digital exposure, instead of just focusing on youths (16-35) as we did in the past. This allows us to examine other age groups who are increasingly participating in the online economy.

For More Insights

<https://www.sea.com>

<https://medium.com/seainsights>



EXECUTIVE SUMMARY

Understanding the world post-pandemic through the lens of the “Digital Generation”: Key Findings

Going beyond youths: The “Digital Generation”

- The past two years have seen unprecedented acceleration in digital adoption across the Thai population. Use of digital tools is no longer confined to youths. The “Digital Generation” needs to be redefined to include a broader set of the population that has digitalised various aspects of their lives.
- As such, in this special edition of our study, we are broadening our survey to include the people aged 16 to 60 who have some level of digital exposure, instead of just focusing on youths (16 to 35) as we did in the past.
- We obtained 12,800 completed surveys with around 2000 of which were MSME owners. While the bulk of our respondents will naturally still be youths, this expanded scope allows us to examine other age groups who are increasingly participating in the digital economy.

Impact of the Pandemic

- **Significant hit to income, savings and mental health.** The negative Impact of the pandemic has been significant especially in terms of economic and mental health wellbeing. Around 70% of those surveyed reported a decline in income and savings. Meanwhile, roughly 60% of respondents also suffered deterioration in their mental health. One year into the pandemic and the share of people struggling with remote working remained close to 80%.
- **MSMEs and women are more vulnerable.** Particularly hard-hit are MSME owners, women and those working in the trade, dining and tourism sectors. They suffered greater income decline and also a sharper decline in mental health. Those with a lower level of digital adoption tend to also experience a greater decrease in income.
- **Flashes of resilience and entrepreneurial spirit.** Despite the challenging environment, 46% of the respondents found new jobs or businesses. 50% of MSMEs started a new business during the pandemic, and 25% of them created new jobs. Businesses with an online presence are more likely to have found a new business and create new jobs.

Understanding the world post-pandemic through the lens of the “Digital Generation”: Key Findings

Digitalisation

- **Strong desire to digitalise further.** Over 60% want to increase digital usage going forward, particularly MSMEs and women. Thai respondents stood out from the region in that they attach greater importance to digitalising finance including payments and lending.
- **Digitalisation has a flywheel effect.** We found that those who see themselves as already active digital users tend to be the ones that want to increase digitalisation further. Perhaps, the desire to utilise digital tools increases once one has experienced the benefits of digitalisation, which then leads to actively overcoming the barriers to digitalisation, creating a positive loop.
- **The barriers to digitalisation differ across groups.** For limited digital users, digital skills related issues are the most common barriers to further digital usage, followed by problems with access. On the contrary, the active digital users tend to cite device issues, followed by concerns over trust and security in the online world.
- **Digital skills transfers during the pandemic.** Almost 40% of the respondents learned how to use digital tools from others and around one-third taught others how to use digital tools. Interestingly, those in their 30s to 40s are most likely to be the “teachers”.

Future post pandemic

- **Pandemic will be long lasting and transformative.** 40% think the pandemic will last beyond 2 years. Around 60% of people think the world will be different or very different after the pandemic.
- **Higher tech adoption the opportunity, economics crisis the top concern.** Thailand is the only country that considers an increase in technology adoption as the most likely opportunity in the post-pandemic era. 86% of Thai respondents, see digitalisation as important for economic recovery. On the other hand, 63% said they are most worried about an economic crisis, followed by another pandemic.
- **Greater mental health awareness featured prominently.** Women and entrepreneurs are more likely to view mental health awareness as a significant opportunity in the post-covid world.
- **Tech usage and resilience are the top skills for the future.** Thai respondents view tech usage, resilience, and self-discipline, and a global mindset as the most important skills in the post pandemic world. However, less than 50% of respondents believe they have sufficient proficiency in the top three most important skills.

Impact of the Pandemic



COVID-19 has significant impact on income, savings and mental health

The pandemic has been a difficult time for Thais. Not only has it significantly disrupted the way they work, but also adversely impacted their economic and mental welfare.

Nearly 80% of those working or studying found it difficult to do so remotely. When only looking at youths and comparing to last year's results, we find that a higher share of this year's youths found it impossible to work and study remotely.

Perhaps more pressing than the difficulty to work remotely, is the economic losses that have occurred. Around two-thirds of Thais reported their incomes decreasing, with significant losses befalling nearly half of Thais. This decrease is accompanied by a proportional decrease in their savings.

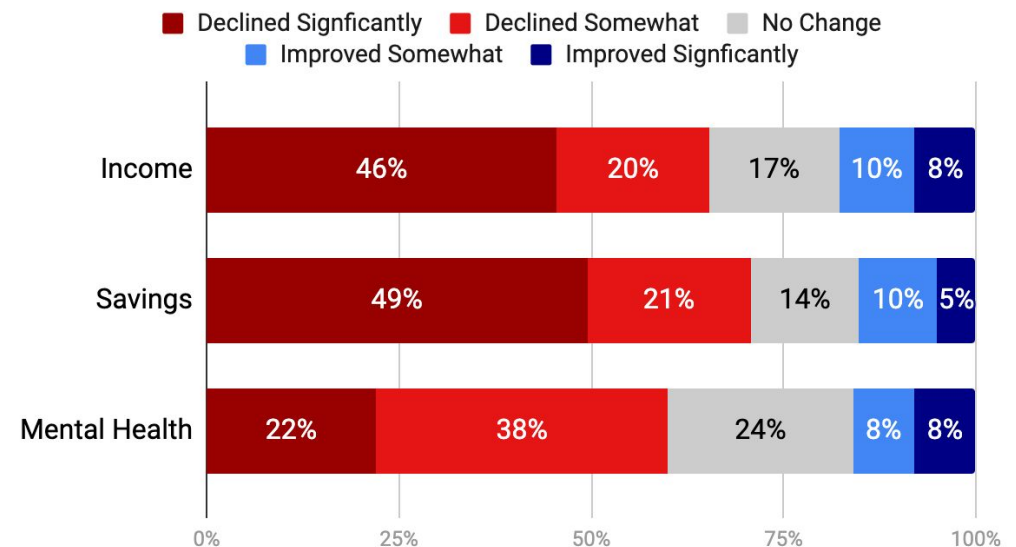
Going beyond economic outcomes, the pandemic has also taken its toll on the mental health of respondents. Over half of Thais reported a decline in their mental health. Moreover, 43% reported a decline in their social life as well.



78%

of students, employees and business owners **struggled with working or studying remotely**. 6% found it impossible to do so.

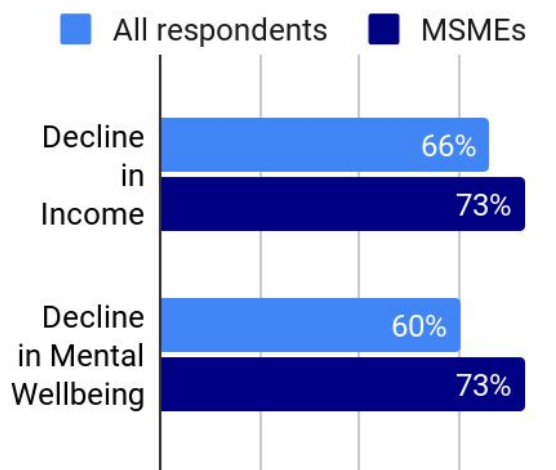
Comparing their current situation to before the pandemic...



MSMEs, women, and those working in dining and tourism were especially hard hit

MSMEs

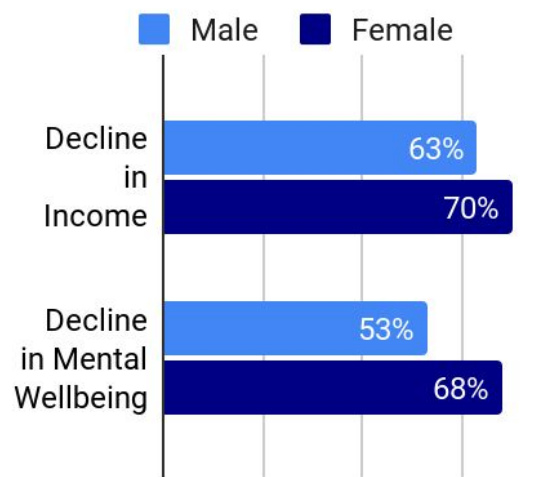
% reporting a decline



MSME entrepreneurs saw a decline in their income and mental health. This may be due to how their incomes and cash flows are highly exposed to swings from economic cycles.

Women

% reporting a decline



Women are also more likely to report a decline in their incomes and mental health. This may partly reflect how women are often the ones who take time off work to take care of family members during social distancing.¹

Dining & Tourism

% reporting a decline in income



78%
Dining &
Tourism



74%
Wholesale &
Retail Trade

Dining, tourism and trade saw the greatest decline in incomes amongst all the different sectors. These sectors were also some that were the most affected by mobility changes brought by the pandemic.

1. See [World Bank's Thailand Economic Monitor January 2021](#)

But we also see signs of resilience and entrepreneurial spirits

Despite the challenging environment, 46% of Thais found new jobs or businesses. In addition, half of MSMEs showed their entrepreneurial spirits by starting a new business during the pandemic, while 25% of them also created new jobs.

Businesses with an online presence are more likely to have found new businesses and create new jobs, particularly women. This not only reflects their entrepreneurial ability, but also how a significant proportion of women set-up an online business to supplement household incomes while also juggling other responsibilities. Consistent with this, we also found that, apart from existing entrepreneurs, homemakers and full time workers are the most likely to start new business.

Thais not only found, but also created employment opportunities

46% of the respondents found new jobs or businesses

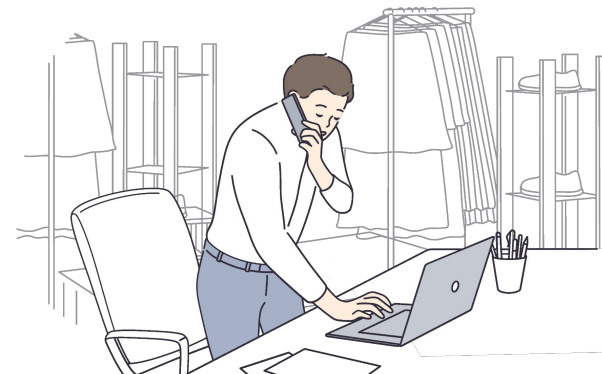


Women, Homemakers and Existing MSME Owners are much more likely to start a new business

MSMEs had to adapt to the pandemic, creating new jobs in the process

50% of MSMEs started a new business during the pandemic

25% of MSMEs created new jobs



MSMEs with an **online presence** were more likely to both create new jobs and businesses

Labor demand varied greatly across different sectors

During the pandemic, workers in the dining and tourism industry saw a significant downturn in employment. Those working in manufacturing and the industrial sectors were also disproportionately affected.

On the other hand, the logistics sector had the greatest share of people who found new jobs (29%), followed by agriculture (26%). The former may reflect the rapid growth of e-commerce sector due to accelerated digital adoption while the latter may be due to reverse migration trend, whereby urban workers returned to rural areas during social distancing.¹

Sectors with the largest share of new workers

% of workers who found their job during the pandemic



29%

Logistics



26%

Agriculture



23%

Tech &
Telecom

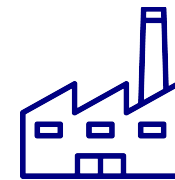
Sectors with the largest share of labour loss

% of workers who lost their job during the pandemic



24%

Dining &
Tourism



16%

Manufacturing

1. อ่านเพิ่มเติมได้ที่ [บทความของธนาคารแห่งประเทศไทยเรื่องแรงงานคืนถิ่นหลังโควิด19](#)

A photograph of two people sitting at a table in a cafe or office setting. The person on the right is holding a white tablet. The person on the left is holding a pen and looking at a smartphone. On the table are two cups of coffee, a spiral notebook, and a pen. The image has blue wavy borders at the top and bottom.

The Promise of Digitalisation

Digitalisation has a flywheel effect: The more digitalised you are, the more you want to digitalise

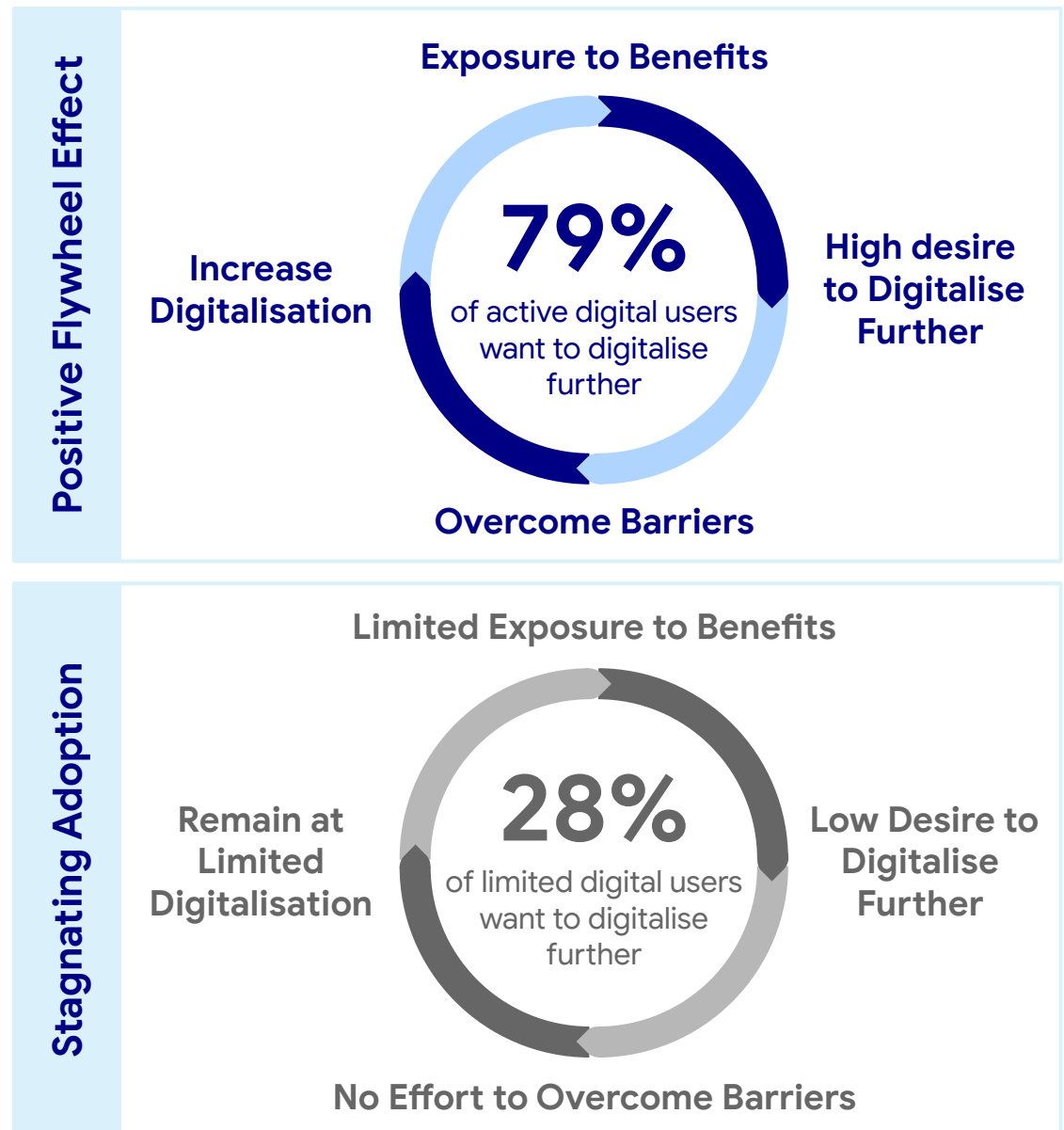
People who see themselves as active digital users, already using digital tools to complete many of their tasks, are also the ones who want to further increase their digital usage the most. We find that this relationship holds for each of the nine aspects of life we explored (see Appendix).

This could reflect a “digitalisation flywheel effect”,¹ whereby the desire to utilise digital tools increases once one has experienced their benefits. This leads to more investment and training to overcome the barriers to digitalisation, creating a positive, self-reinforcing loop. This may also explain why the jump in digital adoption during the pandemic tend to have a lasting impact, as documented in the 2020 edition of our ASEAN Youth Report.²

Conversely, individuals who have not experienced the benefits of digitalisation may have less incentive to overcome the hurdles necessary to obtain them. These findings point to the importance of policies that help nudge people into a virtuous circle.

1. See Jim Collins’ “Turning the Flywheel: A Monograph to Accompany Good to Great”

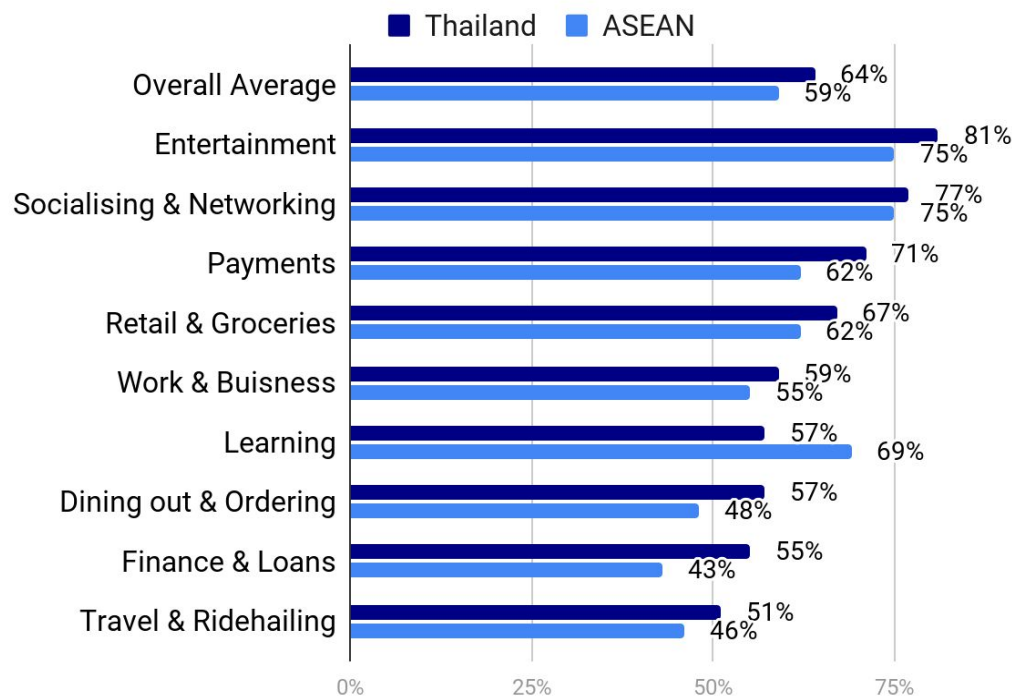
2. “ASEAN Youth Report 2020” [\[link\]](#)



Majority of Thais are eager to further increase digital usage

Thais already had a relatively high level of digital adoption. On average, Thais are using digital tools to complete 64% of their tasks, higher than the regional average of 59%. In fact, the only area Thais are less digitalised in, compared to the region is in learning and education (57% in Thailand compared to 69% regionally). Importantly, over 60% also want to increase digital usage going forward, particularly MSMEs and women who were also those who were more hard hit by the pandemic.

How digitalised are you in the different aspects of your life?



62% of Thais desire to digitalise their lives even further

Who wants to digitalise the most:
(% of those who want to digitalise further)



65%
Women



72%
MSMEs

Top desired areas for further digitalisation:

Socialising	Entertainment	Payments
Retail & Groceries	Work & Business	

Note: Respondents were asked how many tasks in each aspect of life are done digitally and given the options of "Almost all", "Many tasks", "Some tasks", "A few tasks", "None", which were then assigned a corresponding level of digitalisation (100%, 75%, 50%, 25%, 0, respectively).

How digitalisation has benefited Thais

Convenience, speed, and access to information are the top three benefits of digitalisation that Thai users report. The value placed on convenience and time-saving illustrates the importance of a digital journey that is both seamless and smooth. Any frictions or interruptions in their online journey can materially diminish the benefits of digitalisation and its adoption.

For MSME entrepreneurs, digitalisation can decrease disruptions to business operations by improving access to important goods and services. Moreover, they appear to be using online business to generate alternative income streams during difficult times. This may have contributed to greater resilience among MSMEs with digital presence (see next page).

Top 3 biggest benefits from using digital tools for Thais

1. **Greater convenience** (62%)
2. **Time saving through automation** (52%)
3. **Easy access to information** (52%)

The biggest benefits from using digital tools for Thai MSME entrepreneurs



Improving access to goods and services
(62% vs 48% Sample Avg)



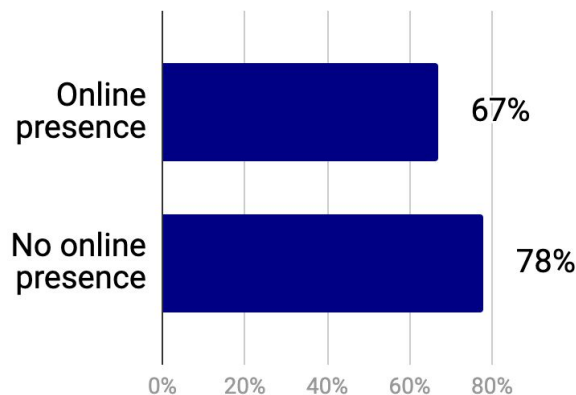
The ability to generate alternative income
(60% vs 38% Sample Avg)

MSMEs and individuals who are more digitalised tend to fare better economically during the pandemic

This is true even when we compare those within the same industry, level of education and age group.¹ Interestingly, higher levels of digitalisation does not necessarily improve mental health outcomes. This may partly reflect the mental strain associated with working from home, such as loneliness lack the of boundaries between work and leisure.²

MSMEs

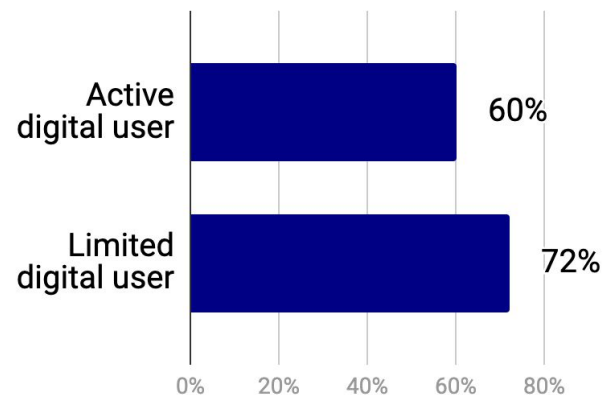
% reporting a decline in income



MSMEs with an online presence were more **less likely to have their incomes decline**

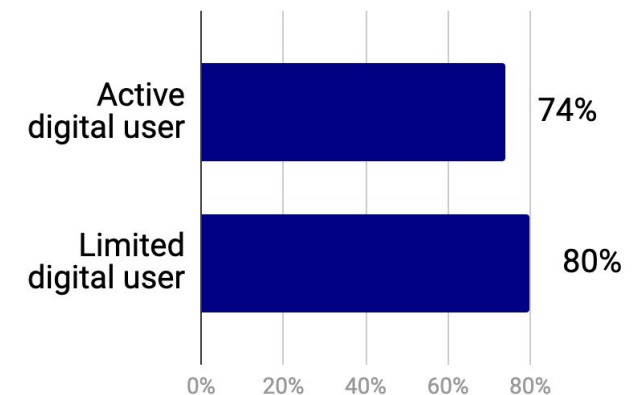
Active digital users³

% reporting a decline in income



Individuals who utilised digital tools more are **less prone to suffer income decline**

% who found working or studying remotely was difficult



Individuals who utilised digital tools actively are **less likely to report it is difficult or impossible to work remotely**

1. Although we cannot conclude anything about the direction of causality, our regression analysis that controls for demographics (e.g. education, industry, age and gender) reveals that a higher level of digitalisation is associated with a lower risk of income decline (See appendix).

2. Financial Times, "[Feeling the strain: stress and anxiety weigh on world's workers](#)".

3. Active Digital Users are those who use digital tools to complete "many" to "almost all" of their work or business tasks, while Limited Digital Users do only "a few" to "none".

Thai workforce see significant benefits from digitalising finance

Within the region, Thailand stood out as being one of the most financially digitalised populations, with not only high-levels of digital adoption in payments and loans, but also a strong desire to digitalise further.

Payments

Thailand is the only country that considers **payment interoperability** as the most important factor in driving digital transformation of the economy (45%). Thanks to PromptPay, the Bank of Thailand's payment infrastructure, many Thais have already experienced the benefits of e-payments, increasing its perceived value. This may be further emphasised by the recent positive outcomes of disbursing government aid to vulnerable Thais through digital means.¹

65% of Thai respondents use e-payments to complete most of their transactions (51% regionally)

76% of Thai MSMEs would like to be more digitalised in their payments

Lending & Financing

Digitalisation of credit and financing is another area of note. More than half of Thai respondents want to digitalise lending, particularly among MSMEs, who were also more hard hit by the pandemic. Therefore, government initiatives like digital lending and digital factoring licenses are steps in right direction. Broadening use of the national digital ID to facilitate remote onboarding of customers could also provide an important foundation for more digitalised financial services.

53% of Thai respondents want to further digitalise how they access financing (43% regionally)

66% of Thai MSMEs would like their access to loans and financing to be more digitalised

1. World Bank, [Thailand Economic Monitor](#), July 2021

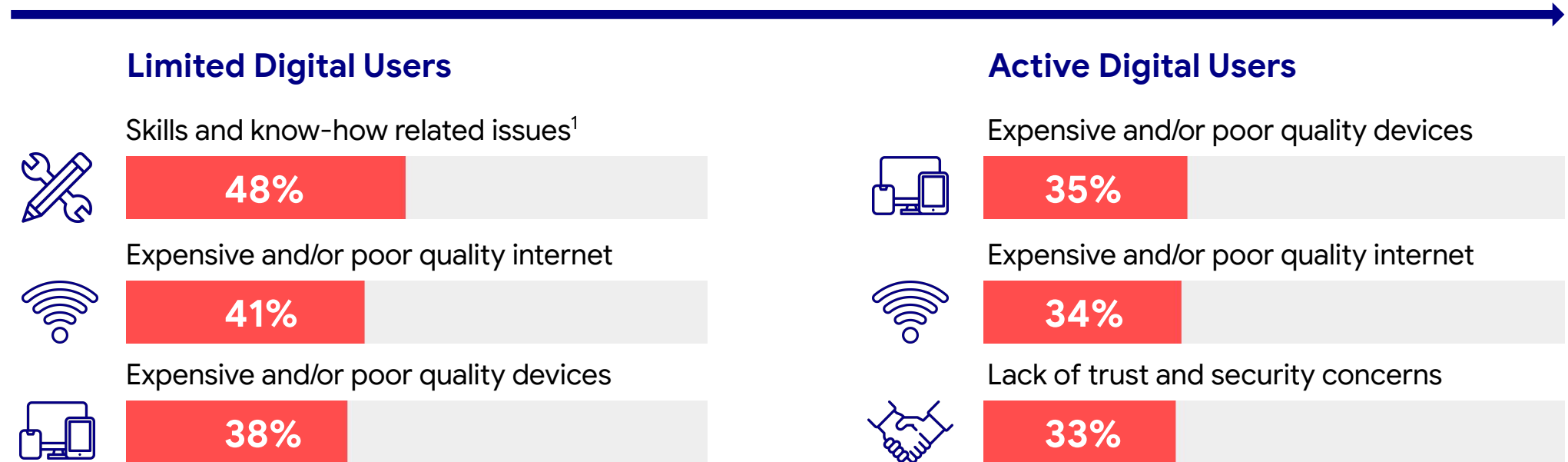
Different approaches required for different groups to digitalise

In general, expensive or poor internet and devices are the most commonly cited barriers. However, there are variations across levels of digitalisation. For limited digital users, a lack of digital skills and know how are the most commonly cited barriers to further digital usage, followed by problems with access. Know how related issues also include not fully realising the benefits that the technology can stop them from exploring.

On the contrary, the active digital users tend to cite device and internet access as the main barriers, followed closely by concerns over trust and security in the online world. These findings point to the need to tailor any effort to raise digital adoption to specific needs of different groups.

Top 3 barriers to digitalisation

Level of digitalisation



1. Which includes lacking digital skills and know-how, lack of confidence and having no opportunity to use digital tools

The pandemic sparked a significant transfer of digital skills

The 30s to 40s generation played a key role as both learners and teachers

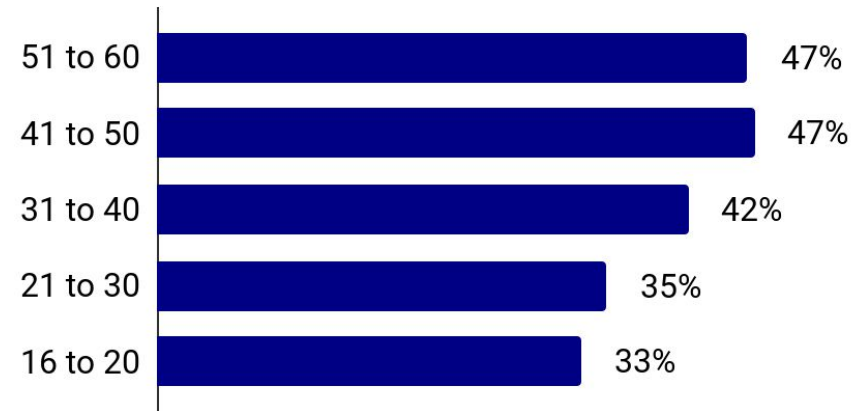
There was a significant transfer of digital skills across the population during the pandemic. On average, 38% of respondents said they learned how to use a new digital tool from another person, while 33% said they taught someone.

Compared to other age groups, those in their 40s to 60s are much more likely to be “learners” of digital skills, reflecting a mindset of lifelong learning.

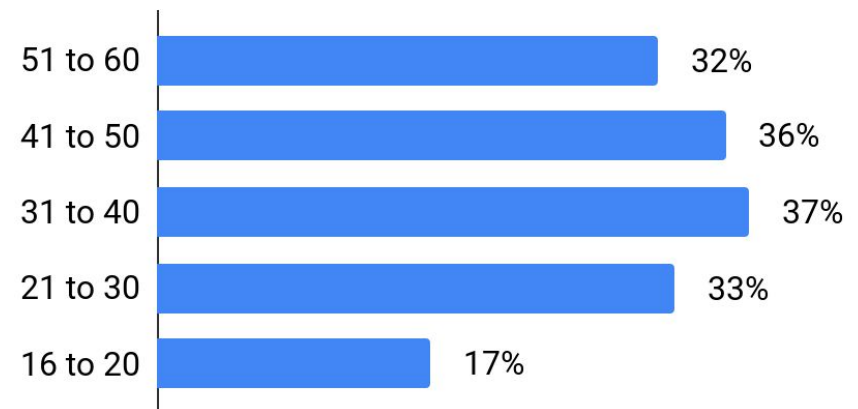
Somewhat surprisingly, older respondents, particularly those in their 30s to 40s, were the most likely to have taught others new digital skills. With a propensity to share their digital know-how, this age group behaves like a “digital ambassador” to their peers.

On the other hand, the younger respondents, those typically considered as digital natives, were less likely to do so. While may be inclined to assume that “digital ambassadors” tend to be the youth, our findings suggest that other generations can also serve that role.

Learning from others to use a new digital tool



Teaching others to use a new digital tool

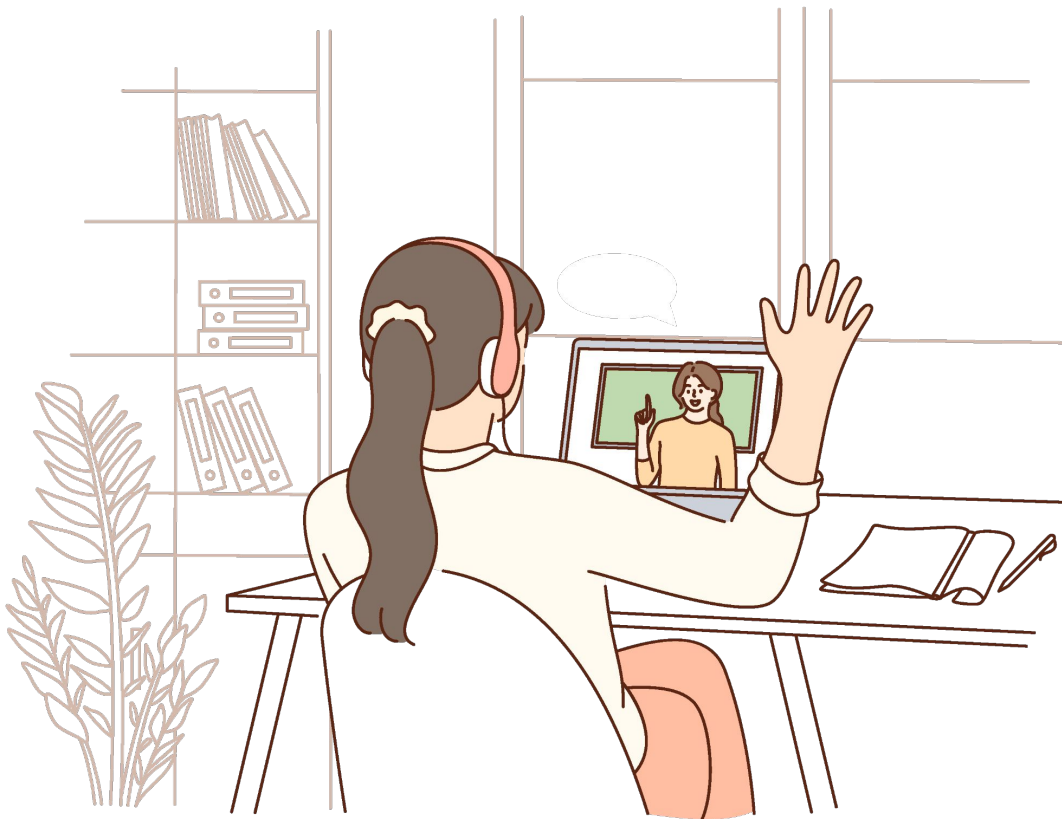




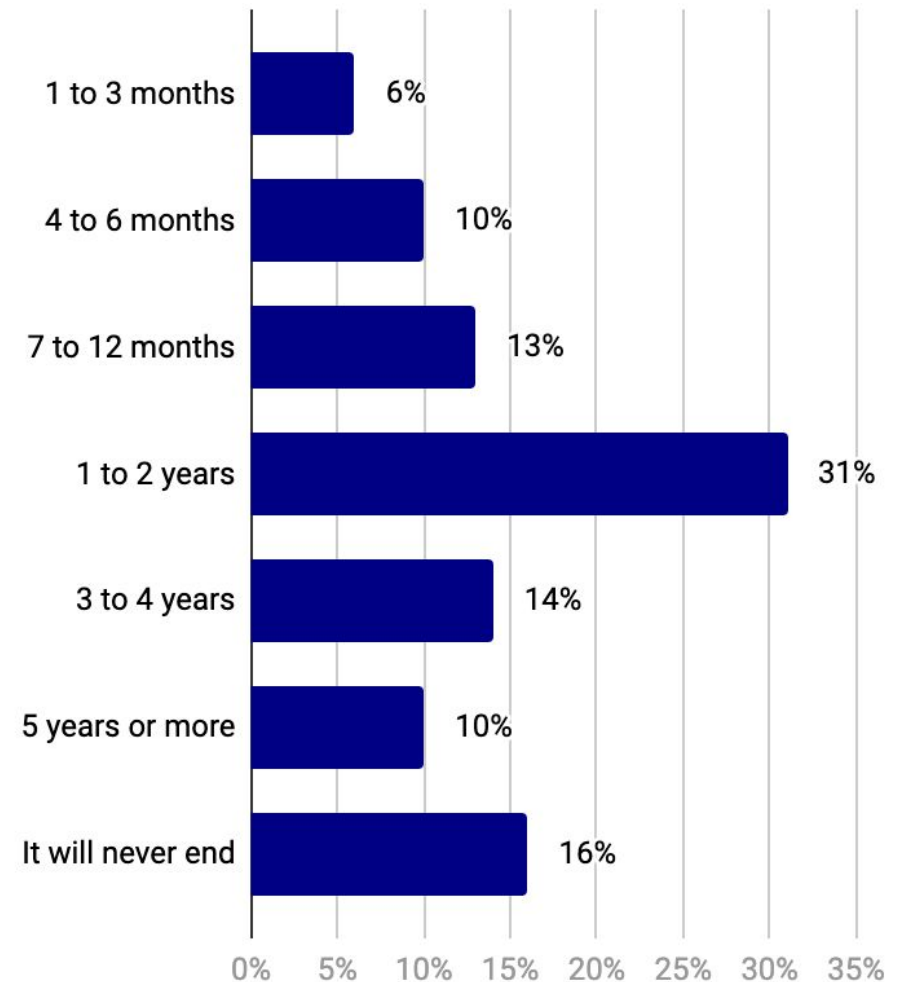
The Post-Pandemic Future

The pandemic will be long lasting and transformative

While the majority of Thai respondents believe the pandemic will end within 2 years, 40% think it could take longer and 16% believe it will never end. Meanwhile, close to 60% of the Thai people surveyed also think the world will be significantly different after the pandemic.



When will the pandemic end?

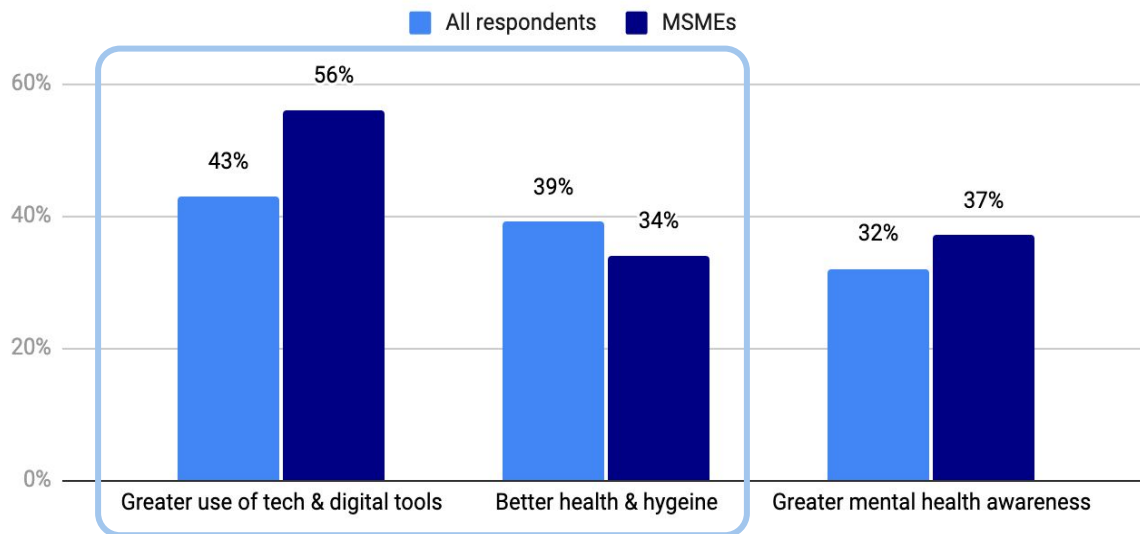


Thais expect adoption of tech to increase further after the pandemic

Thailand is the only country in the region that regards greater use of digital tools and technology as the biggest opportunity in the post-pandemic world. Other countries tend to place improvement in healthcare at the top of their list. Similarly, 86% of Thais surveyed believe digitalisation will be a key factor in economic recovery.

MSME owners are particularly supportive of digitalisation. They are the most likely to believe that digitalisation is a critical driver of economy, with its adoption certainly increasing in the future. Interestingly and contrary to popular belief, we also found that older respondents were more confident in the economic promise of digitalisation than their younger counterparts.

Top 3 things most likely to happen in a post-pandemic world



“Digitalisation is important to economic recovery”



91%

MSMEs

91%

Aged >35

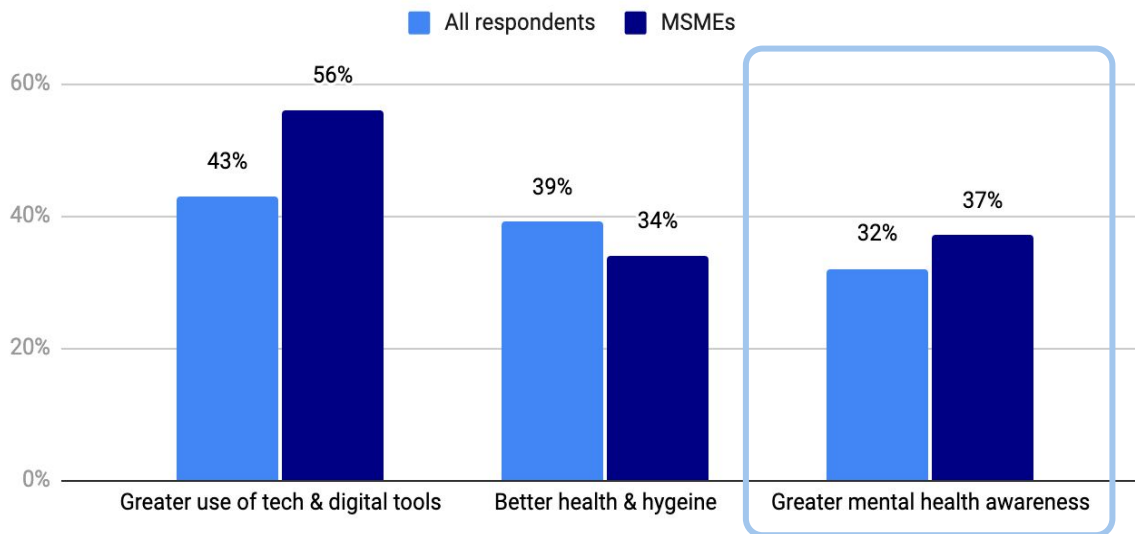
86%

All respondents

Greater recognition of mental health issues and a more caring society

Greater awareness of mental health also came up prominently as a potential positive change for the future among those we surveyed. This is particularly true for women and entrepreneurs. Coincidentally these two groups were also more likely to report deterioration in mental health. Moreover, following closely behind is the possibility of becoming a more caring and compassionate society. With a sizable share of respondents (30%), this expectation may be an extension of how people have extended helping hands to those in need during the crisis.

Top 3 things most likely to happen in a post-pandemic world



“Greater awareness of mental health is a top 3 thing that is most likely to happen”



38%

Females

37%

Entrepreneurs

32%

All respondents

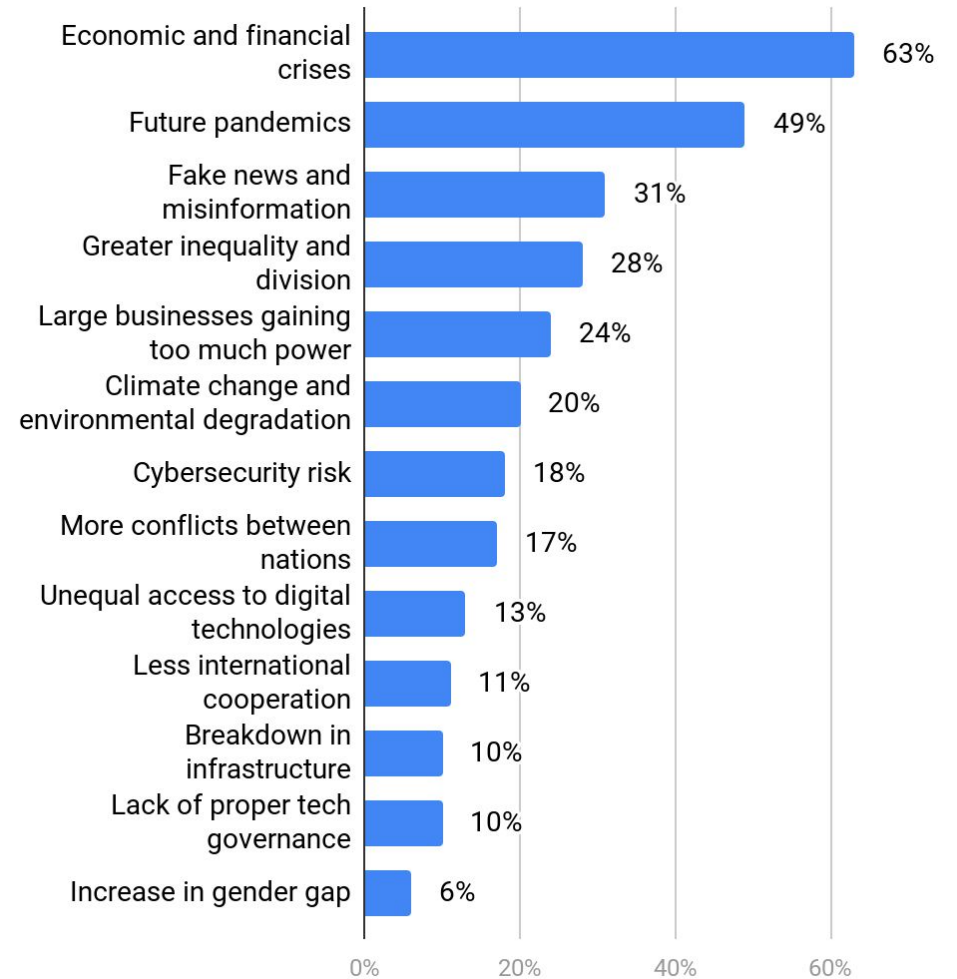
Future economic crises are the number one concern for Thais

When asked what they were most worried would happen in the post-pandemic world, Thai respondents indicated another economic crisis and future pandemics at the very top of their list. While their concerns may be justified, this may also simply reflect their belief that the current pandemic may last for some time.

Concerns around fake news came in third, probably due to the surge of misinformation around health and medical developments during the pandemic. Other prominently featured risks include rising inequality and market power as well as environmental degradation.



What are you most worried about after the pandemic?



Tech usage and resilience are the top skills for the future

Global mindset and language skills are also considered as important

When asked about the 3 most important skills needed for the post-pandemic world, respondents chose the ability to use tech, resilience and adaptability, and self-discipline.

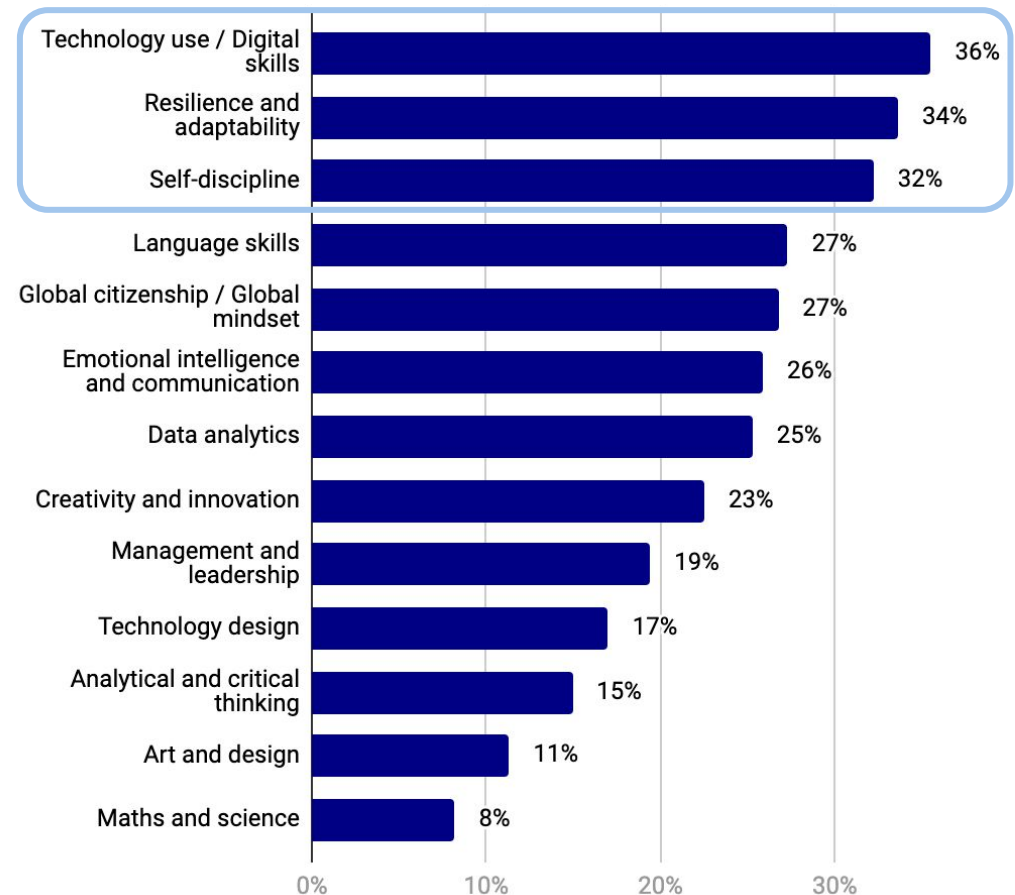
The top 3

The importance of tech skills is unsurprising given the respondents' general view that technology is crucial for the future. The importance of resilience, adaptability and self-discipline probably reflect the challenges people have had to endure and overcome throughout the pandemic. We see these skills as closely related to the “entrepreneurial mindset”, which allows individuals to stay determined, learn from failures, and adapt in uncertain environments.

A global mindset¹ and language skills

These are also deemed important skills for the future, ranking 4th & 5th. In fact, within the region, Thailand has the highest percentage of respondents choosing global mindset as their top 3 most important skill. This may reflect how Thais think the ability to connect with the world will become ever more important after the pandemic.

The most important skills for the future



1. A global mindset is often defined as the ability to perceive and decode behaviors in multiple cultural contexts and to appreciate the differences among cultures and bridge the interfaces between them. See Forbes [“Being Global II: Global Leaders Have a Global Mind”](#).

Proficiency in these critical skills has room to improve

<50% of respondents believe they are proficient in the most important skills for the future

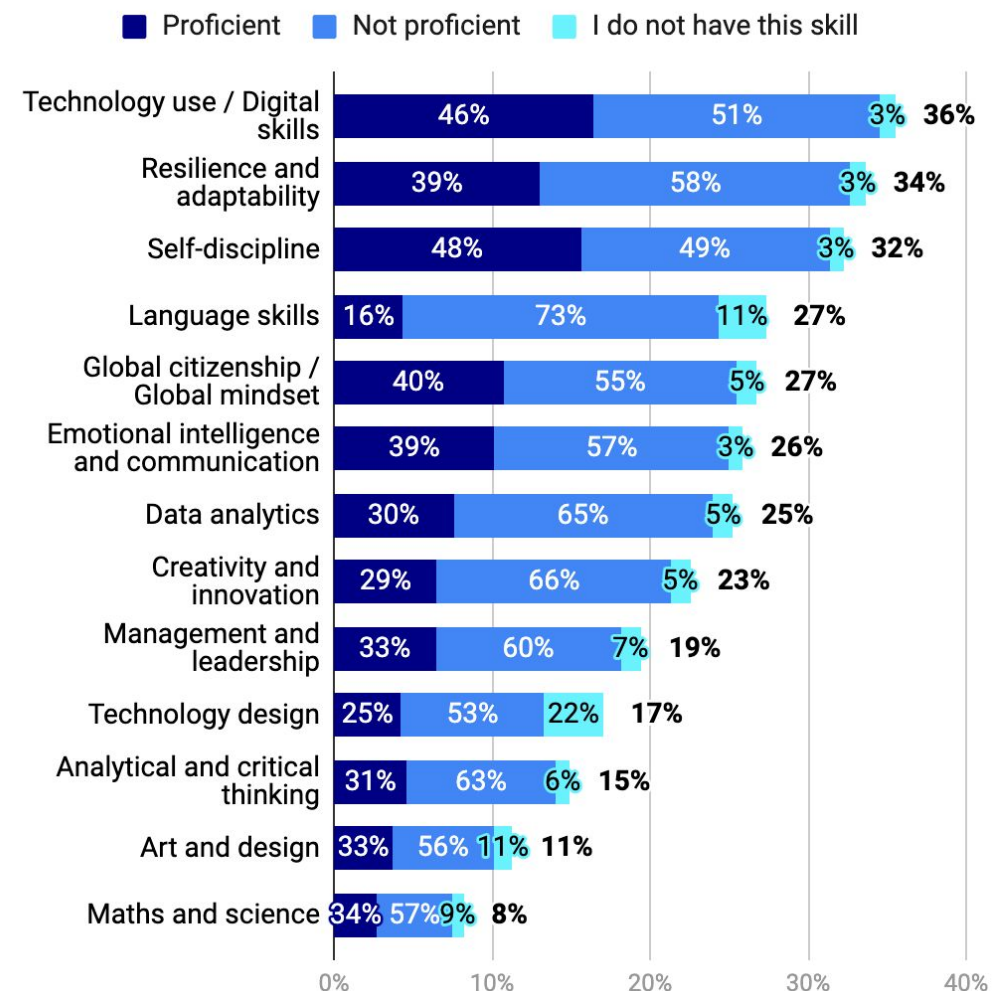
Respondents were asked to rate their proficiency in the three skills they thought were most important for the future. Skills that are more important in general are those with a higher proportion of Thais who consider themselves proficient. For example, 36% of respondents consider digital skills as essential, of which only 46% believe they are proficient.

However, given that less than half of respondents rate themselves as proficient in these key skills point to potential room for improvement in their training, upskilling and reskilling.

These efforts will create a more productive workforce and, at the very least, will help improve their confidence. The areas in most need of attention are tech design (e.g. coding) and language skills, both boasting the largest gaps in proficiency.

On average, Thais rated themselves broadly in line with the region across virtually all skills except language. Here they considered themselves as a lot less proficient (16% vs 23% regionally).

Proficiency of key skills for the future



Skill importance and proficiency differ across age groups

We found that respondents' views on skill importance and their proficiency can vary across different generations.

For technology use, interestingly, we find that its perceived importance increases significantly by age. However, this is not the case when asked about proficiency. People in their 20s to 40s seem to have greater confidence in this skill than the older and younger generations.

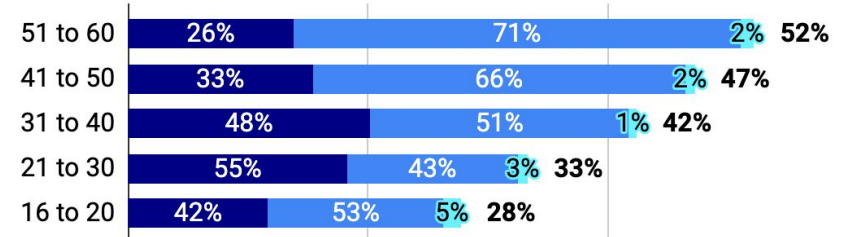
For technology design skills, such as coding and programming, we found a different pattern. Younger generations are more likely to think that such skills are important and they also tend to be more confident in their proficiency. This is one of the areas where more investment might be needed in trainings to build more programmers to cater to the accelerating digitalisation.

For global mindset, different generations appear to share similar views on its importance. On the proficiency front, however, the youth believe themselves to be much more proficient at being global citizens which may reflect their greater global exposure through online and social media.

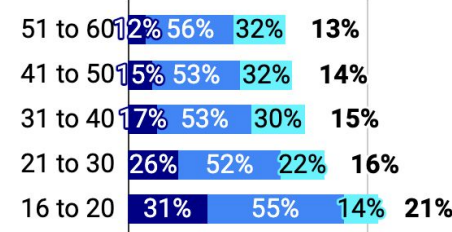
Proficiency of important skills by age

■ Proficient ■ Not proficient ■ I do not have this skill

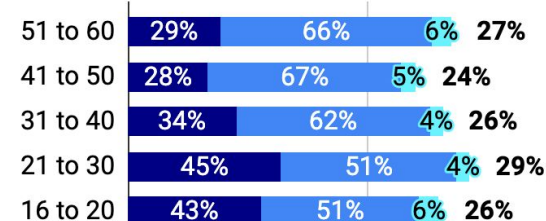
Technology Use



Technology Design



Global Citizenship / Global Mindset



MSMEs: What have we learned about them?

Compared to sample average, MSMEs owners are/have:

More vulnerable.

They are more likely to experience declines in income, savings and mental health.

Adaptable and entrepreneurial.

They are more likely to started a new business (50% vs 24% average) and some also created new jobs for others (25% vs 19%), especially women entrepreneurs.

Benefits significantly from digitalisation.

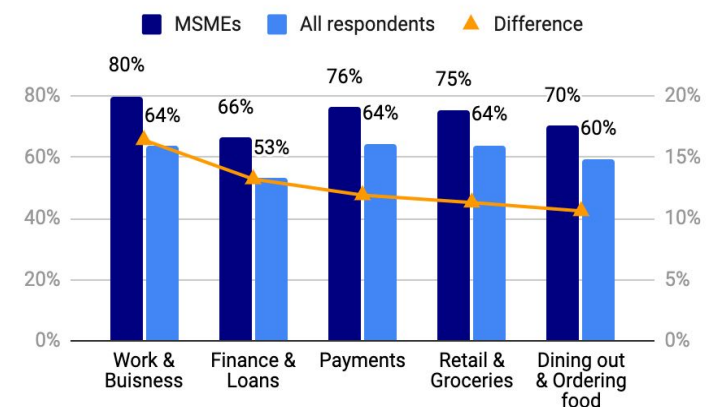
Benefits from digitalisation go beyond convenience to include access to goods and services, earning additional income. Those with an online presence tend to suffer less income decline.



Strong desire to adopt technology.

They tend to be more keen to digitalise than general respondents, especially in the area of work/business, financing and payments. They are also more likely to view digitalisation as important for recovery and that skills to use technology is crucial.


% who want to be more digitalised in the following aspect of their lives



MSME Case Study



Saowalak

 Local Mauhom Clothes

 Phrae Province

Saowalak was successfully running her Mauhom clothes business for over 5 years until taking a hit by the pandemic in 2020. Her physical shops were closed, and sales dropped to only 10%. Income during the crisis was not enough for her to take care of all her employees and family.

Shopee came across as an opportunity for her during this time. Pivoting to the digital platform brought back orders and jobs for the local people in her community. By leveraging Shopee's large customer base, she is now selling all sizes and types of Mauhom clothes online, creating sustainability for not just her family but for everyone in the community.



Watch full story [here](#).

10 Takeaways for the Future



10 Takeaways for the Future

1. A whole new world.

More than a year into the pandemic, we have already seen large shifts in behavioural norms via digital adoption. But respondents are expecting even more changes when the pandemic ends, with greater focus on tech usage and health.

2. Greater support needed for MSMEs and women.

Apart from the tourism sector, MSMEs and women are the hardest hit by the pandemic both economically and mental health-wise. They are also the ones who show signs of adaptability, from finding new businesses to adopting technology. These groups deserve greater support from both the public and private sectors.

3. Opportunity to improve (physical and mental) healthcare

The people we surveyed saw the prospect of improving healthcare and rising awareness of mental health issues as the top three most likely things to happen in a post pandemic world. We should not underestimate the importance of mental health issues given the high level of stress during the pandemic.

4. Digitalisation for economic recovery.

The consistent message throughout the survey is Thai respondents have a strong desire to digitalise further. They also believe that technology adoption will be important for the economic recovery, particularly among women and MSMEs entrepreneurs.

5. Build on a strong foundation of digital payments.

Thailand is more digitalised than its peers in the area of payments, likely thanks to the Bank of Thailand's policies, such as PromptPay. This provides a strong foundation for further digitalisation in financial services (e.g. lending) to improve financial inclusion. The majority of respondents report wanting greater digitalisation in finance, particularly MSMEs, who may have experienced fundings problems during the pandemic.



10 Takeaways for the Future

6. Avoiding a digital divide

Avoiding the divide requires better and more affordable internet access, digital skills and trust. But priorities may differ across different demographics. Limited digital users requires more help on digital skills training, whereas active users need good devices and a secure online environment.

7. Digitalisation needs a nudge.

Digital adoption has a flywheel effect. Policymakers may need to help nudge these users to utilise the technology until they realise its benefits e.g. by linking economic stimulus programs with digital adoption. They will then be more open to investment and training to overcome the barriers to further digitalisation, creating a positive loop. On the contrary, any friction to the digitalisation journey experience will prevent the flywheel effect from taking off.



8. Find your digital ambassadors.

People tend to learn how to use digital tools from each other during the pandemic. We found that the “digital ambassadors” are not just the youth, but can come from various age groups, especially those in their 30s-40s. This is something that can be built upon to increase digital upskilling between and within generations.

9. Equip the workforce with an entrepreneurial mindset.

Digital skills are necessary but not sufficient for the future. The Thai workforce also needs an entrepreneurial mindset that allows them to stay resilient, adapt to changing circumstances, and learn from failures. Such a mindset is by no means exclusive to entrepreneurs and can benefit the broader workforce too.

10. Raise the global exposure of talents.

Many Thai respondents ranked global mindset and languages high up in the ranking of skills for the future. It will be worth considering programs to raise global exposure of Thai talents. This could be an area whereby academic institutions, businesses, and policymakers can explore further together.



APPENDIX

Appendix: Survey methodology

ASEAN Youth Survey - 2021:

- The results of this report are largely based on the Annual ASEAN Youth Survey, conducted in partnership with the World Economic Forum.
 - Between June and July, we reached close to 86,000 people through our Garena and Shopee platforms as well as social media channels. The majority of the respondents (~76%) are youths aged 16 to 35, with the remaining are aged 36 to 60.
 - Respondents from Thailand amounted to 12,800, of which 2,000 were MSME owners.
-

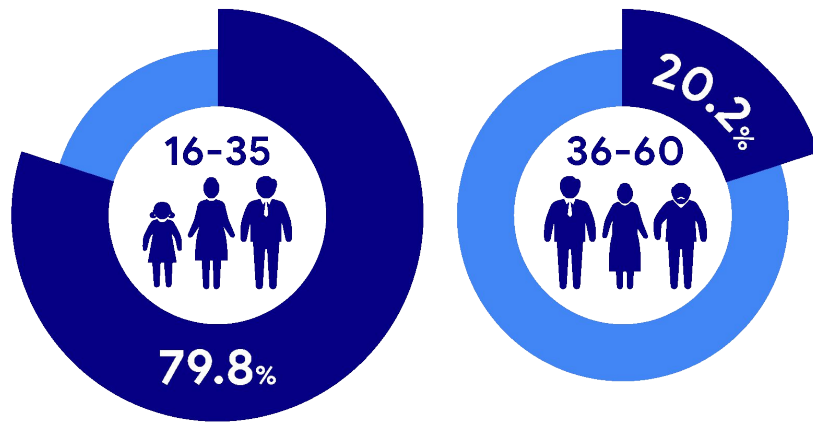
ASEAN Youth Survey - 2020:

- In 2020, we surveyed around 70,000 youths aged 16 to 35 through Garena and Shopee platforms, in partnership with the World Economic Forum.
- The study tried to find out how ASEAN youths managed to adapt to COVID-19 and the key gaps that the public, private and social sectors need to work together on to support the youths.

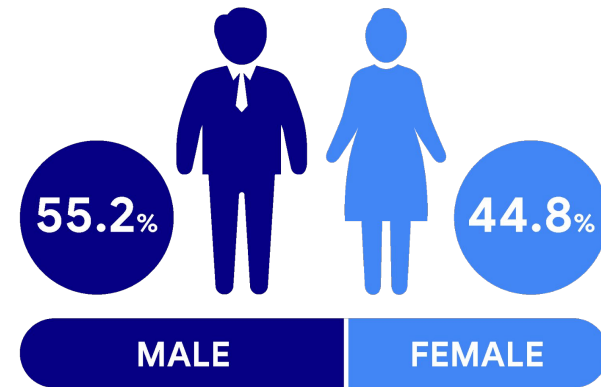
Appendix: Survey Demographics - Thailand

Total respondents: 12,843

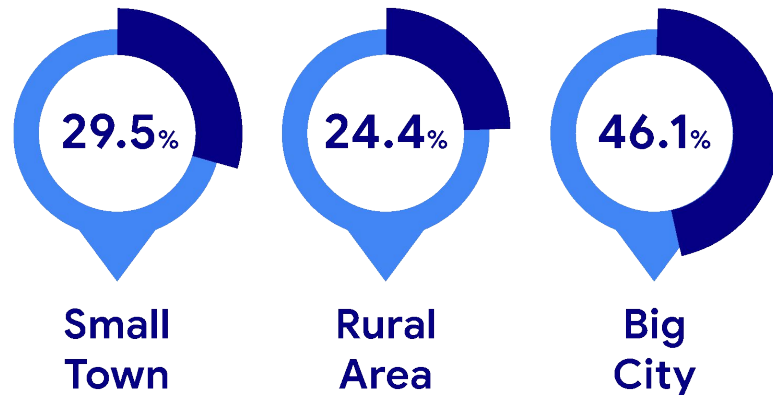
Age



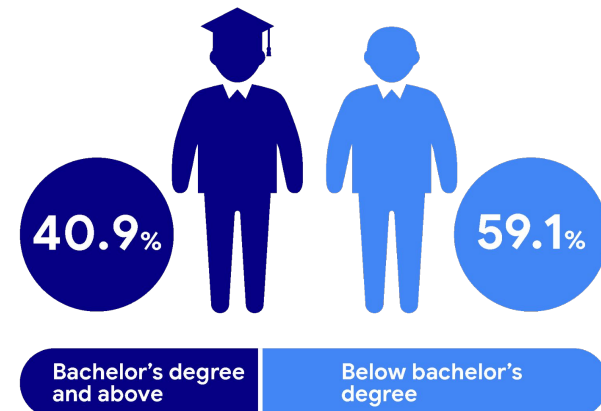
Gender



Location



Education



Appendix: Notes

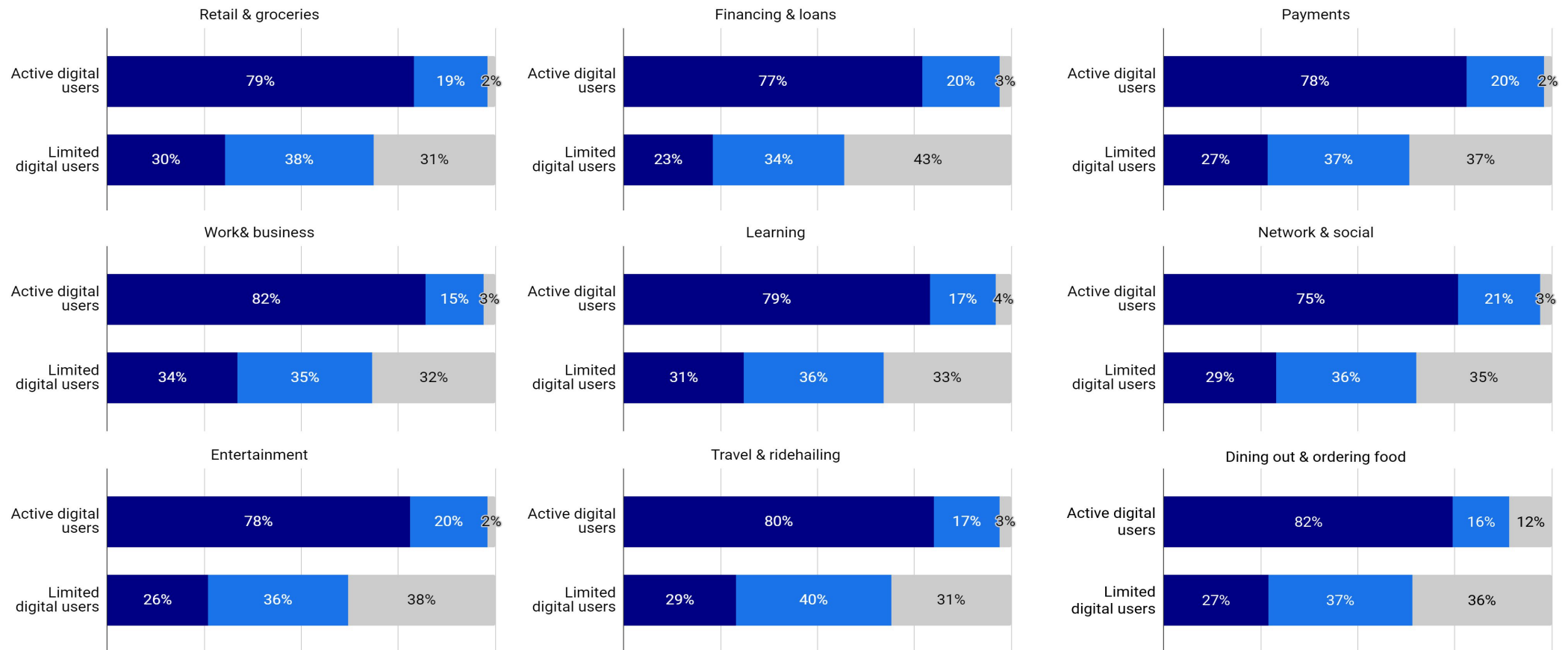
In our survey, respondents were asked how many tasks in each of the below aspect of life are done digitally and given the options of “Almost all”, “Many tasks”, “Some tasks”, “A few tasks”, “None”:

1) Retail / Groceries, 2) Finance / Loans, 3) Payments, 4) Work / Business, 5) Learning, 6) Networking / Social, 7) Entertainment, 8) Travel / Ridehailing, 9) Dining out / Ordering food.

We found that active digital users are more likely to want to further increase their digital usage for all nine aspects (see chart below).

Do you want to do the following tasks more digitally?

■ Yes, will use more ■ No, this is enough ■ No, will use less



Appendix: Previous research

Reports from Sea Insights - Sea's Research and Public Policy Unit

1. Thai Youth Report 2020 - COVID-19: A Profound Transformation: see [link](#)
2. ASEAN Youth Survey 2020 - The True Test of Resilience & Adaptability: see [link](#)
3. Reimagining SME Recovery in Indonesia (2020): see [link](#)
4. Uncovering Thailand's Hidden Assets Through E-commerce (2019): see [link](#)
5. ASEAN Youth Survey 2019 - ASEAN Youths and the Future of Work: see [link](#)
6. What do Indonesian youth think about jobs in the age of disruption (2019): see [link](#)
7. Youth x Entrepreneurship in Thailand 4.0 (2019): see [link](#)

For more of our research, go to www.medium.com/seainsights

