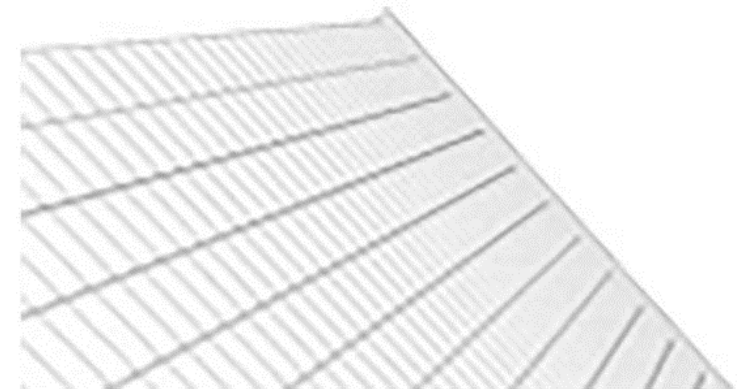


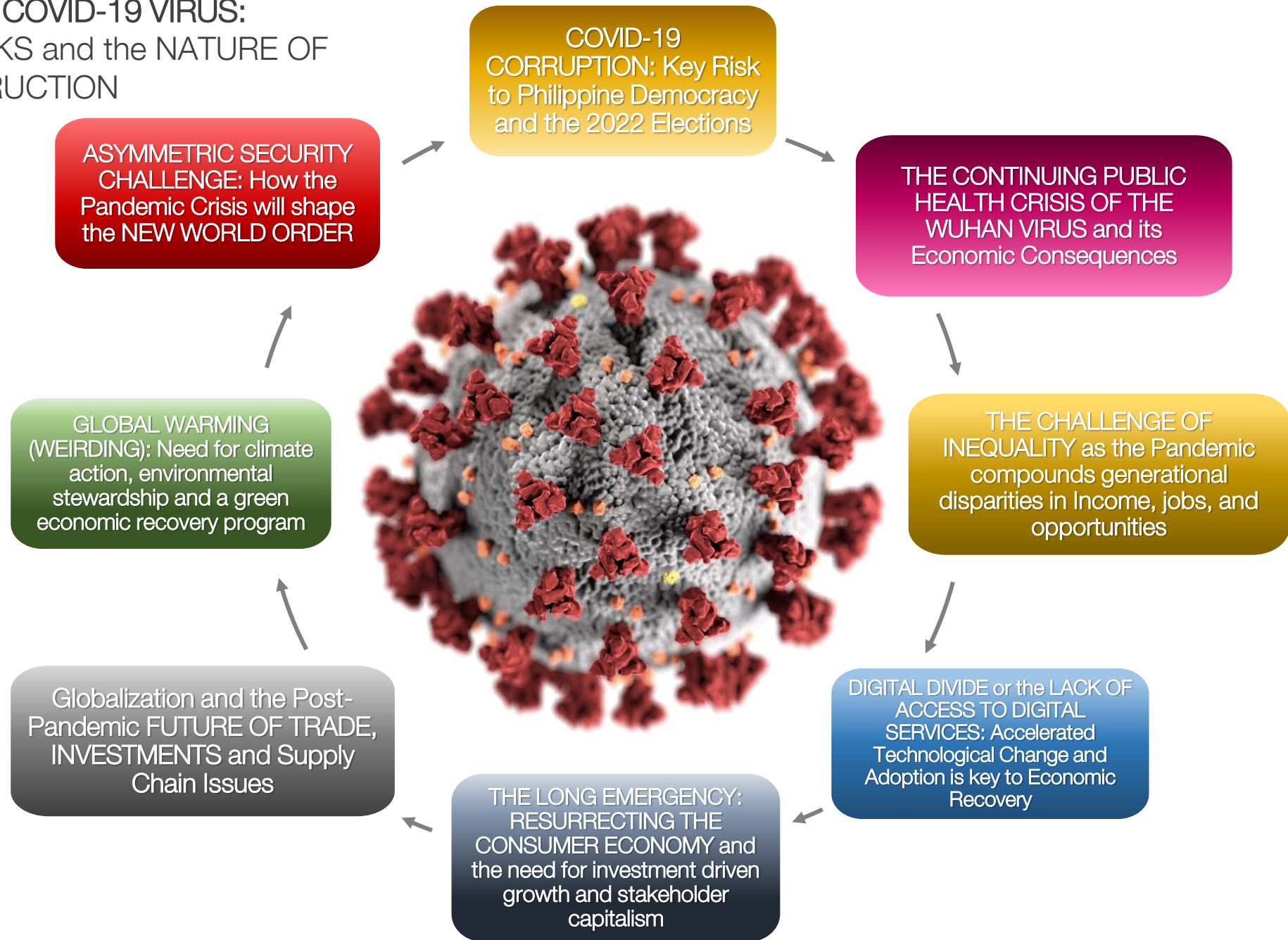
BUILDING DIGITAL INFRASTRUCTURE FOR A DIGITAL PHILIPPINES

9:00 AM – 11:00 AM | 11 MARCH 2021 (THURSDAY)

VIRTUAL TOWN HALL DISCUSSION



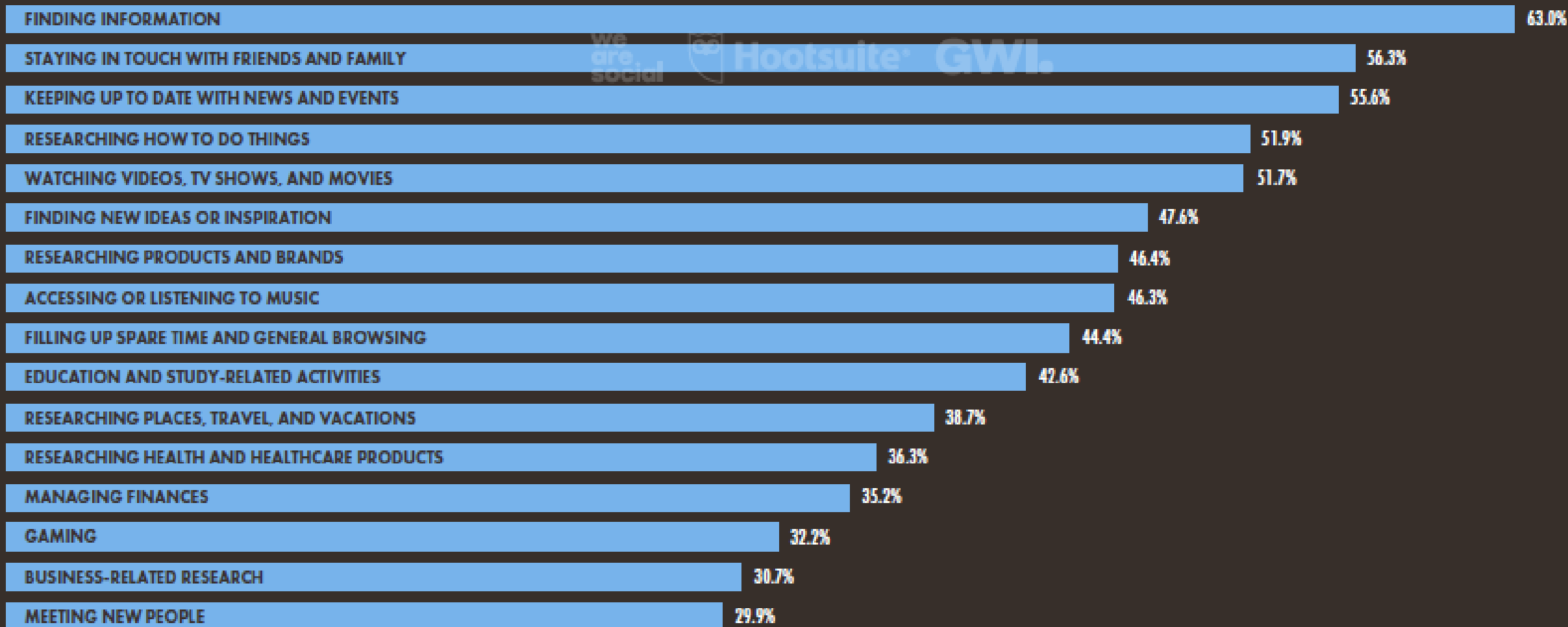
LIVING WITH THE COVID-19 VIRUS: 8 PANDEMIC RISKS and the NATURE OF CREATIVE DESTRUCTION



JAN
2021

REASONS FOR USING THE INTERNET

PRIMARY REASONS WHY GLOBAL INTERNET USERS AGED 16 TO 64 USE THE INTERNET



JAN
2021

THE PHILIPPINES

ESSENTIAL HEADLINES FOR MOBILE, INTERNET, AND SOCIAL MEDIA USE

 CHANGES TO DATA SOURCES FOR INTERNET USERS AND SOCIAL MEDIA USERS MEAN THAT VALUES ARE **NOT COMPARABLE** WITH PREVIOUS REPORTS



THE PHILIPPINES

TOTAL
POPULATION



110.3
MILLION

URBANISATION:
47.6%

MOBILE
CONNECTIONS



152.4
MILLION

vs. POPULATION:
138.2%

INTERNET
USERS



73.91
MILLION

vs. POPULATION:
67.0%

ACTIVE SOCIAL
MEDIA USERS



89.00
MILLION

vs. POPULATION:
80.7%



we
are
social



we
are
social

 **Hootsuite**

SOURCES: THE U.N.; LOCAL GOVERNMENT BODIES; GSMA INTELLIGENCE; ITU; GWI; EUROSTAT; CNNIC; APJ; OECD; SOCIAL MEDIA PLATFORMS' SELF-SERVICE ADVERTISING TOOLS; COMPANY EARNINGS REPORTS; MEDIASCOPE; CAFEBAZAAR. **COMPARABILITY ADVISORY:** SOURCE CHANGES. INTERNET USER NUMBERS NO LONGER INCLUDE DATA SOURCED FROM SOCIAL MEDIA PLATFORMS, SO DATA ARE **NOT COMPARABLE** WITH PREVIOUS REPORTS. SOCIAL MEDIA USER NUMBERS MAY NOT REPRESENT UNIQUE INDIVIDUALS, SO **MAY EXCEED INTERNET USER NUMBERS**.

JAN
2021

DAILY TIME SPENT ON MEDIA

THE AVERAGE DAILY TIME* THAT INTERNET USERS AGED 16 TO 64 SPEND ON DIFFERENT KINDS OF MEDIA AND DEVICES



TIME SPENT USING THE
INTERNET (ALL DEVICES)



10H 56M

TIME SPENT WATCHING TELEVISION
(BROADCAST AND STREAMING)



3H 30M

TIME SPENT USING
SOCIAL MEDIA



4H 15M

TIME SPENT READING PRESS MEDIA
(ONLINE AND PHYSICAL PRINT)



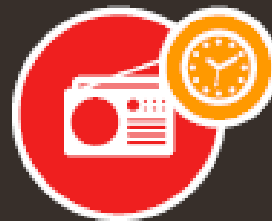
1H 12M

TIME SPENT LISTENING TO
MUSIC STREAMING SERVICES



2H 15M

TIME SPENT LISTENING
TO BROADCAST RADIO



0H 47M

TIME SPENT LISTENING
TO PODCASTS



0H 43M

TIME SPENT PLAYING VIDEO
GAMES ON A GAMES CONSOLE



1H 31M

SOURCE: GWI (Q3 2020). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE [GLOBALWEBINDEX.COM](https://www.globalwebindex.com) FOR MORE DETAILS.

*NOTES: CONSUMPTION OF DIFFERENT MEDIA MAY OCCUR CONCURRENTLY. TELEVISION INCLUDES BROADCAST (LINEAR) TELEVISION AND CONTENT DELIVERED VIA STREAMING AND VIDEO-ON-DEMAND SERVICES. PRESS INCLUDES ONLINE AS WELL AS PHYSICAL PRINT MEDIA. BROADCAST RADIO DOES NOT INCLUDE INTERNET RADIO.

JAN
2021

ECOMMERCE ACTIVITY OVERVIEW

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 THAT HAS PERFORMED EACH ACTIVITY IN THE PAST MONTH



SEARCHED ONLINE FOR
A PRODUCT OR SERVICE
TO BUY (ANY DEVICE)



GWJ.

89.3%

VISITED AN ONLINE
RETAIL SITE OR STORE
(ANY DEVICE)



87.8%

USED A SHOPPING
APP ON A MOBILE
PHONE OR ON A TABLET



GWJ.

85.7%

PURCHASED A
PRODUCT ONLINE
(ANY DEVICE)



we
are
social

80.2%

PURCHASED A
PRODUCT ONLINE
VIA A MOBILE PHONE



69.6%

JAN
2021

INTERNET CONNECTION SPEEDS: OVERVIEW

AVERAGE **DOWNLOAD** SPEEDS FOR MOBILE AND FIXED INTERNET CONNECTIONS, WITH YEAR-ON-YEAR COMPARISONS



AVERAGE DOWNLOAD
SPEED OF MOBILE
INTERNET CONNECTIONS



we
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22.50
MBPS

YEAR-ON-YEAR CHANGE IN
AVERAGE SPEED OF MOBILE
INTERNET CONNECTIONS



KEPIOS

+34.2%

AVERAGE DOWNLOAD
SPEED OF FIXED
INTERNET CONNECTIONS



Hootsuite

31.44
MBPS

YEAR-ON-YEAR CHANGE IN
AVERAGE SPEED OF FIXED
INTERNET CONNECTIONS



+23.1%

In the wake of the mobility restrictions during the strict quarantine conditions last year,

Philippine telcos have reported a 500% increase in data usage when lockdowns started last year because of the massive shift to online services to adapt to travel restrictions and working from home.

We see an increasing demand for broadband services as all business transactions are going digital.

Ookla reported for January 2021 that the Philippines continues to improve its overall Internet speed.

The Philippines is now at 86th spot from 111th on mobile internet speed, while maintaining its 100th spot on fixed broadband speed, when compared to year-on-year data.

Subfactors	2016	2017	2018	2019	2020
Regulatory framework	59	62	61	60	62
Capital	28	29	43	40	39
Technological framework	48	50	52	51	49

Regulatory framework	Rank	Capital	Rank	Technological framework	Rank
▷ Starting a business	62	IT & media stock market capitalization	41	▷ Communications technology	62
▷ Enforcing contracts	61	Funding for technological development	51	Mobile Broadband subscribers	52
Immigration laws	41	Banking and financial services	24	Wireless broadband	33
Development & application of tech.	46	Country credit rating	43	Internet users	58
Scientific research legislation	48	Venture capital	47	▷ Internet bandwidth speed	61
Intellectual property rights	54	▶ Investment in Telecommunications	10	▶ High-tech exports (%)	2

The **IMD World Digital Competitiveness Ranking 2020** report revealed that the Philippines placed 10th highest for investment in telecommunication led by **the private telecommunications companies**.

ASEAN Government Telco Infrastructure Spending

Malaysia

US\$233 million for increasing coverage and broadband speed

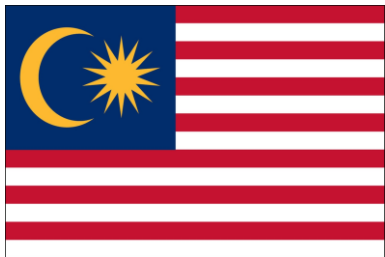
Thailand

US\$343 million to connect thousands of villages

Vietnam

US\$820 million for a 23,000-kilometer submarine cable system.

IMD World Digital Competitiveness Ranking 2020

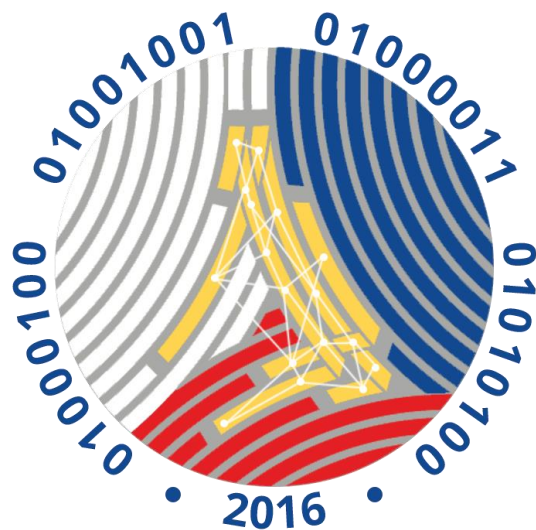


The Philippine government should invest in building digital infrastructure to cope with increasing demand for connectivity. Having adequate and robust digital infrastructure is crucial to our economic recovery and will have long term benefits that will drive sustainable growth.

Crucial for Economic Recovery

Digitization has proven to be vital to economic continuity and has enabled us to safely live and work in pandemic conditions. An extensive digital infrastructure will enable the nationwide delivery of hi-speed broadband services required for the fast digitization of government bureaucracies and private industries.

Building a robust broadband backbone is a long-term infrastructure asset that will boost the country's competitiveness in an emerging digital economy and indispensable, not just to survive this crisis, but to rebound and push for an acceptable pace of recovery.



DICT
DEPARTMENT OF INFORMATION AND
COMMUNICATIONS TECHNOLOGY

**CITIZEN
WATCH**

TELECOM TOWER WATCH

A multi-sectoral initiative to help push the fast development of digital infrastructure in the Philippines, that will promote the transparency and accountability of all relevant parties in accelerating the building pace of telecommunications towers nationwide.

“One thing that this pandemic has taught is the importance of the whole-of-society approach (government, private sector, and CSOs) to addressing our most pressing challenges. Given the increased importance of connective technology during this pandemic, **the continued development of our country’s digital infrastructure is one such of the key challenges that requires the combined efforts of multiple sectors of society.**”

Building digital infrastructure for a digital Philippines

BusinessWorld, 9 March 2021

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