ithra

Country Report
China

Country insights report 2024

sync

China

Overall score
60.5 (out of 100)

Placed
9th (out of 35)

The Digital Wellbeing Index (DWI) showcases a relatively strong digital landscape in China. With an overall score of 60.5, China is placed 9th among the 35 countries analyzed. Within this, China is placed 29th in the "Capturing opportunities" sub-index and 13th in the "Balancing needs" sub-index.

China is placed 2nd among the countries in the East Asia and Pacific region, scoring higher than the regional average of 60.1 and the overall DWI average of 57.2. However, the country also displays potential for growth in improving its digital wellbeing landscape. With a score of 62.5 China performs better in the Capturing opportunities sub-index while it shows room for improvement in the Balancing needs sub-index with a score of 58.4.
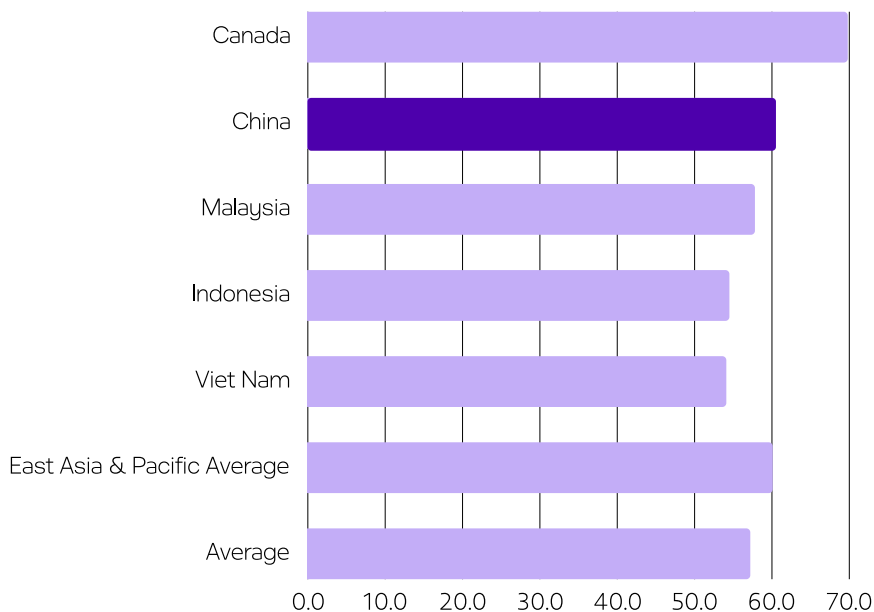
Comparative performance in the DWI

Country profile: China

The context of digital wellbeing in the country

China is a global leader in the digital space and has accelerated its digital transformation in the last few years. According to a report released at the Global Digital Economy Conference 2023 in Beijing, from 2016 to 2022, the scale of China's digital economy increased by 4.1 trillion U.S. dollars, with a compound annual growth rate of 14.2%. The share of the digital economy in China's GDP rose to 41.5%, making it an important engine for stable growth and transformation. Such transformations can positively impact digital wellbeing by fostering innovation, efficiency, and inclusive access to opportunities in the digital landscape.

The transformation in the digital economy is driven by businesses seizing the rapid expansion of internet access for Chinese consumers. By June 2023, China had about 1.08 billion internet users, nearly double the number recorded at the end of 2012. Meanwhile, internet penetration increased to almost 76% from 42.1% during this period. By 2027, it is predicted that 40% of the total revenue for China's top 2,000 companies will be generated by digital products, services and experiences, while the current figure stands at less than 20%. This largely comes from the high demand for online good and services from Chinese consumers, with 89% using independent shopping apps on smartphones weekly, as compared to 34% in the United States.

In January 2022, China unveiled its "14th Five-Year Plan for the Development of the Digital Economy," highlighting its significance for overall development. China aims to increase the contribution of "core industries" in the digital economy from 7.8% to 10% of total GDP by 2025. Key objectives include:
- Digital Infrastructure: Focus on enhancing digital infrastructure, including 5G network expansion.
- Data Utilization: Prioritizing data as a fundamental production factor.
- Digital Transformation: Implementing digital transformation across all industries.
- Innovation: Improving innovation capabilities in areas such as sensors, quantum computing, AI, and blockchain.
- Governance: Enhancing the governance system for the digital economy.
- Cybersecurity: Emphasizing cybersecurity and data security.
- International Engagement: Actively engaging with international partners like the EU, ASEAN, African countries, and "Belt and Road" nations on digital economy policies.
- "Secure and Controllable" Technologies: Promoting the adoption of secure and controllable local technologies.

Massive digital transformation provides people with broader access to information, services, and opportunities, contributing significantly to digital well-being through increased connectivity and empowerment.

The National Digital Plan in China is poised to have a significant impact on the acceleration of digital businesses in the country. It places a strong emphasis on integrating digital technologies into various aspects of society, instilling confidence in the ICT industry's development. Additionally, the plan aims to stimulate the growth of China's digital economy, offering opportunities in digital infrastructure, big data, and AI sectors while supporting the country's digital economic development. Furthermore, it recognizes the importance of digital sovereignty and cybersecurity, outlining measures to enhance data security, governance, and legal frameworks, thereby creating a trusted digital security environment. Lastly, the plan promotes international cooperation in the ICT sector through initiatives like the Digital Silk Road and participation in global frameworks, benefiting Chinese ICT vendors and contributing to the global deployment of ICT solutions, ultimately bolstering China's

global presence in the digital arena. Consequently, such measures not only accelerate economic growth but also boost the digital workforce in the country, while ensuring a safe and secure digital world.

As with many countries, the COVID-19 outbreak accelerated digital healthcare transformation in China. The number of online medical users increased from 214.8 million in December 2020 to 233.33 million in Jun 2021, a growth rate of 11.42%. Moreover, the scale of the internet medical market in China in 2019 was 133 billion yuan and reached 200 billion yuan in 2020.

One area of digital healthcare that has proved successful is the introduction of "internet hospitals" as part of the "Internet Plus Healthcare" strategy, which allows medical care and medicine distribution to be done online. By the end of 2022, the Chinese government had approved a total number of 2,700 internet hospitals, with the number of users of internet-based medical services in China reaching 363 million. This was supported by China's Ministry of Industry and Information Technology and the National Health Commission announcing the "5G+ Medical Health" pilot projects, which aligned hospitals and the rapid 5G network to deliver innovative and efficient digital health solutions for the Chinese population.

Within healthcare and the wider economy, China has shown a commitment to using future technology to enhance the wellbeing of its population. In 2022, the Ministry of Science and Technology issued several policies to promote the application and innovation of AI technology in the healthcare industry including disease prediction, clinical decision support systems, drug development and health management. Blockchain has also been incorporated within healthcare to create a secure national dataset of medical records that can be shared with social insurance authorities and medical institutions. It is expected that all public medical and health institutions in China will be connected to this national health information platform by 2025.

Chinese firms heavily invest in digital tech, focusing on AI, 5G, and cloud computing for enhanced productivity. Tencent Cloud, with over 50 models, offers personalized AI services, impacting finance, culture, media, government, and education. China's comprehensive digital initiatives, spanning economic transformation, healthcare, and technological innovation, converge to shape a digital landscape that not only propels economic growth but also prioritizes the wellbeing of its citizens, fostering innovation, efficiency, and inclusive access to opportunities in the digital realm.

## The country's strengths and areas for improvement

China scores highly in various aspects of the index, particularly in the access to goods and services pillar, where it is placed 2nd out of 35, indicating that the Chinese population have good access to technology-enabled areas that cover basic needs and increase life convenience. High rankings in both the physical health and mental health pillars, scoring 66.1 (4th out of 35) and 61.3 (7th out of 35) respectively, suggest that technology in China is used in a way that does not hinder and may even improve overall health. Lastly, a score of 65.8 (6th out of 35) in the social connectedness pillar suggests technology is an important aspect of how people maintain and form new relationships.

However, a score of 37.5 (placing 22nd out of 35) in the ability to disconnect pillar suggests that there is room for growth in the mechanisms and behaviours that support healthy technology use, including setting boundaries between work and other areas

of life. Also placing 22nd out of 35, a score of 52.7 in the entertainment and culture pillar indicates that technology could be used more to expose the Chinese population to different cultures and more varied information. Lastly, a score of 76.4 (placed 23rd out of 35) in the connectivity pillar means there could be room for improvement in providing internet access to all of China.

Performance of China by index pillars compared to DWI sample

● China
● DWI Average
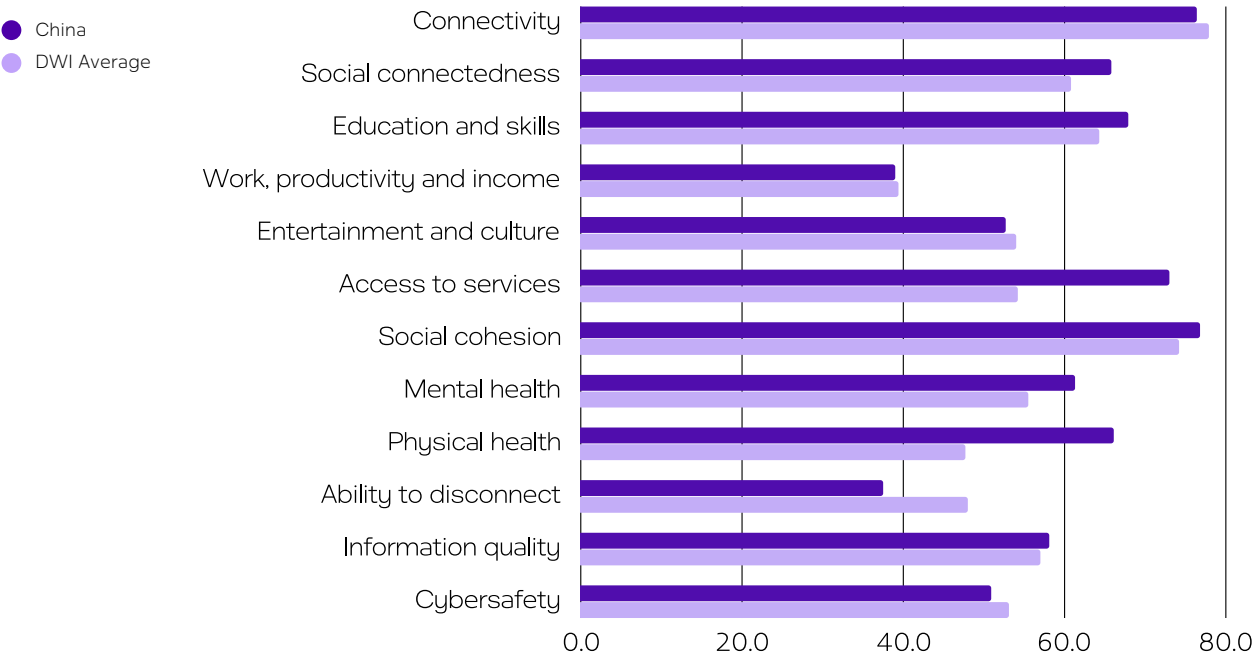
Overall performance by index pillars

TABLE 5 Source: Global Digital Wellbeing Index 2024

Dimensions	Score (0 to 100)	Placed (out of 35)	Key findings
Connectivity	76.4	23	While internet is relatively affordable, low international bandwidth and population penetration result in a lower score.
Social connectedness	65.8	6	Survey respondents suggest that relationships are supported by technology and users engage with their social media. However, this is offset by average levels of local social media platforms.
Education and skills	67.9	10	Digital education in schools and micro-credentials are areas of strength, while digital devices are used to access information and education at a level that is around the average of the index.
Work, productivity and income	39.0	19	While remote work is promoted and also recognised in law, there is no digital nomad visa. A strong ICT workforce exists alongside technology enabled work being evident in China from survey responses. Although, those looking for work via digital means was far below the index average.
Entertainment and culture	52.7	22	While survey respondents suggest art, culture, leisure and entertainment is regularly created and shared digitally, findings from DWI suggests the government could improve their promotion of culture and tourism online
Access to services and goods	73.0	2	The digitalization of government, health, finance, and transportation has been a huge success in China.
Social cohesion	76.8	15	Inclusion and access policies are evident across different demographics.
Mental health	61.3	7	Survey respondents do not suggest above average addictive behaviours. However, they report a high impact of remote working/ studying on mental health. This is coupled with DWI finding revealing that there is no current education on how to prevent technology from impacting mental health.
Physical health	66.1	4	Strong levels of activity are combined with low impacts of technology use on physical health.
Ability to disconnect	37.5	22	An absence of a right to disconnect law and limited behaviours to ensure digital wellness result in a relatively low score in this category.
Information quality	58.1	12	Survey respondents suggest that critical information and source evaluation skills are high. There is potential to bring in more education about misinformation in the curriculum.
Cybersafety	50.9	17	Various policies to ensure data safety exist and robust data protection behaviour is suggested by survey respondents. However, there is a lack of education for parents and children on digital safety and laws for reporting cyberbullying and online abuse could be improved.

Suggestions that may contribute to improvements across the digital ecosystem:

Internet penetration
Enhance the internet penetration (those using the internet) across China. Currently at 75.6%, almost on quarter of China does not have access to internet. This divide hinders the effectiveness of initiatives like internet hospitals contributing to regional disparities and limiting benefits for a significant portion of the population. Therefore, while 5G infrastructure within the new five-year-plan is an important investment in future technology, it is perhaps more critical to ensure investment is made to connect those who have no internet access.

Mental Health Impacts of Studying
Introduce curriculum-based education that informs children about how to protect their mental health when studying. This may take place through workshops in classrooms about healthy habits or by providing support to those struggling with the pressure of school, grades and parental expectations. It may also be useful to work with schools to ensure they are not placing excessive amounts of pressure on children. It could be reasonable to set out guidelines on how much time children should spend on their homework so that schools, children, and their parents have the same expectations on how much time should be spent studying.

Right to disconnect
Create a healthy balance between work and other aspects of people's lives by introducing a right to disconnect law. This law protects workers' rights to be able to switch off their digital technology while working remotely in order to protect their mental health. This initiative could be in conjunction with information campaigns to educate remote workers on better habits when working online. Information could be directed through the Internet Plus Healthcare strategy where citizens receive tips such as the importance of getting outdoors and not looking at their screen for too long.

Digital Safety
Create part of the curriculum that focuses on digital safety while also educating parents on how to ensure their children are safe online. This could introduce children to the various dangers that exist online and how to create settings that filter out harmful content. Similarly, parents can be educated through school emails or letters to make them aware of the dangers online and the importance of monitoring their child's activity. Combined with these initiatives should be an improvement in the reporting mechanisms so social media users can get harmful content off the internet before it is seen by children. This work could also be supported by artificial intelligence monitoring social media sites given China's strong investment in the area.

Global Digital Wellbeing Index Executive Summary

Digital technologies have reshaped how we connect, work, and perceive the world. As our dependence on these tools grows, so too does the need to understand and optimize the balance between technology use and wellbeing. The Global Digital Wellbeing Index (DWI) explores the foundational elements of digital wellbeing, acknowledging the complex and multifaceted dimensions involved. The DWI aims to stimulate global discussions, influence policymakers, and provide a benchmark for stakeholders to navigate the evolving landscape of digital wellbeing. It covers 35 countries and combines data from well-established secondary sources (e.g. UN, World Bank), a dedicated survey, and policy assessments into a framework that consists of 12 pillars, organized into two complementary components or sub-indices (1) balancing needs and (2) capturing opportunities. The DWI provides overall country-level scores out of 100, as well as scores for both components and for each of the 12 pillars (also out of 100).

In terms of overall scores on the index, Canada, Australia, Singapore, Estonia, France, the United Kingdom, Germany, the United States, and Italy do especially well. China stands out with a strong performance among middle-income countries. While wealthier countries achieve the best scores on average, having a higher income does not always guarantee a better performance: for example, China, Argentina, Colombia, Malaysia, Mexico, and Bulgaria achieve scores equal to or above the global average (57 out of 100). Across the entire sample, the pillars with the highest scores are connectivity (78) and social cohesion (74). Those with the lowest scores, requiring the most attention, are work, productivity and income (39), physical health (48), and the ability to disconnect (48). As highlighted throughout this report, each country has its relative digital wellbeing strengths as well as areas for growth and enhancement.

TABLE 1

Source: Global Digital
Wellbeing Index 2024

Overall performance in the DWI

Rank	Country		Score (0-100)
1		Canada	69.8
2		Australia	69.0
3		Singapore	68.1
4		Estonia	67.1
5		France	66.8
6		United Kingdom	66.3
7		Germany	65.2
8		United States	61.0
=9		China	60.5
=9		Italy	60.5
11		Argentina	60.2
12		Sweden	60.2
=13		Chile	59.6
=13		Korea, Republic of	59.6
15		Colombia	58.1
16		United Arab Emirates	57.9
17		Malaysia	57.8
=18		India	57.5
=18		Japan	57.5
20		Mexico	57.4
21		Bulgaria	57.2
22		Brazil	55.1
=23		Indonesia	54.5
=23		Kenya	54.5
25		Türkiye	54.4
26		Viet Nam	54.1
27		Saudi Arabia	53.8
28		South Africa	53.0
29		Ghana	50.6
30		Kuwait	50.0
31		Nigeria	48.4
32		Egypt	46.6
33		Pakistan	45.1
34		Bangladesh	44.1
35		Algeria	39.8

Balancing Needs

The "Balancing Needs" sub-index includes six pillars examining the risks posed by digital technology and to what extent these risks are being addressed. This component of the DWI captures the most direct action being taken around the world to support digital wellbeing.
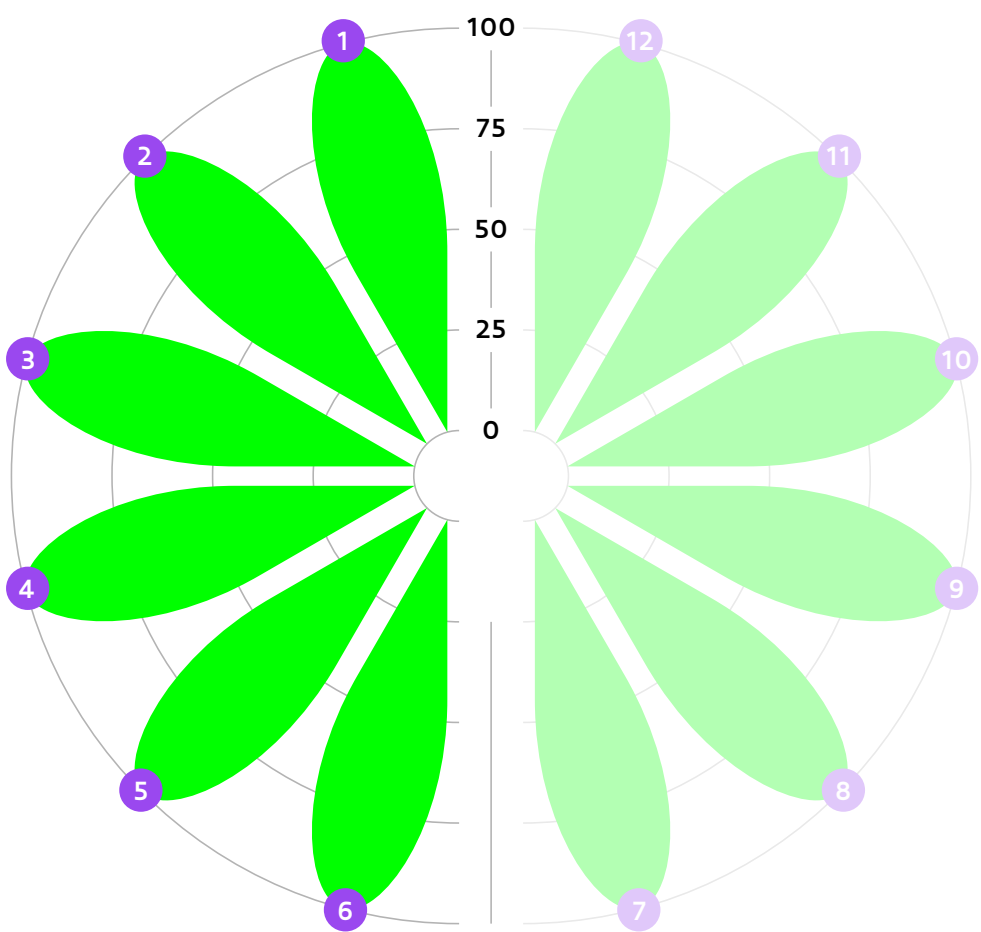
1 Social Cohesion	**5** Information Quality	9 Education and Skills
2 Mental Health	**6** Cybersafety	10 Work, Productivity, and Income
3 Physical Health	7 Connectivity	11 Entertainment and Culture
4 Ability to Disconnect	8 Social Connectedness	12 Access to Services and Goods

Policies to support digital mental health can help vulnerable individuals — an area with the potential to be improved across the board.

Singapore leads in the mental health pillar, followed by the United Kingdom and the Republic of Korea. Generally, advanced economies have better scores, but China and Algeria stand out among middle-income nations. Only eight countries have complete frameworks for digital mental health — that is, the use of digital technology to directly support mental health care and service provision — with Singapore, the United Kingdom, and Canada showcasing successful integration into education. Bangladesh, India, and the United Arab Emirates report greater levels of distress associated with extended digital technology use, while the United States, Australia and Canada report the most significant psychological impacts such as feelings of loneliness and anxiety linked with remote working or studying. Less affluent countries report lower levels of such distress, potentially due to less common remote activities, which can be linked to connectivity gaps and lower flexibility of work arrangements.

Maintaining physical health is a challenge given growing exposure to digital technologies, stressing the need for more dedicated policies.

Canada, France, and Australia lead in the physical health pillar; overall, richer countries attain higher scores in this area. Eight countries have clear government recommendations on the healthy use of digital technologies. Only Canada, India, Estonia, and Ghana fully address physical health risks in school curricula. Viet Nam, Malaysia, Ghana, and Nigeria reported more physical health complaints associated with digital technologies including dry eyes, headaches, and back pain. Algeria, Ghana, and Bangladesh reported greater disruption to offline activities such as in-person engagement with family and friends, and missing work and school related activities.

"Right to disconnect"[01] policies show decisive action to promote digital wellbeing and represent one area with the potential to be developed around the world.

Affluent countries are generally stronger in this area, with Australia, Italy, and Germany leading in the ability to disconnect pillar. Argentina, Mexico, and Colombia, middle-income countries, demonstrate a strong performance too. Nine countries in the DWI — Australia, Argentina, Canada, Chile, Colombia, France, Germany, Italy, and Mexico — have established legislation on the right to disconnect. When it comes to remote work or study, challenges in maintaining healthy boundaries show no significant differences across income segments, but advanced economies show overall higher adoption rates of measures to promote digital wellbeing at work.

Misinformation and disinformation pose risks to wellbeing that require government action around the world.

Estonia leads in the information quality pillar, followed by Argentina, and Canada. Fourteen countries demonstrate clear governmental action against misinformation. Seventeen countries, across all income levels integrate disinformation awareness into education. Trust in online information is highest in Nigeria, followed by Bangladesh, Germany, and Estonia with generally similar levels across income segments. Viet Nam, Indonesia, and Malaysia are the most active in verifying information accuracy.
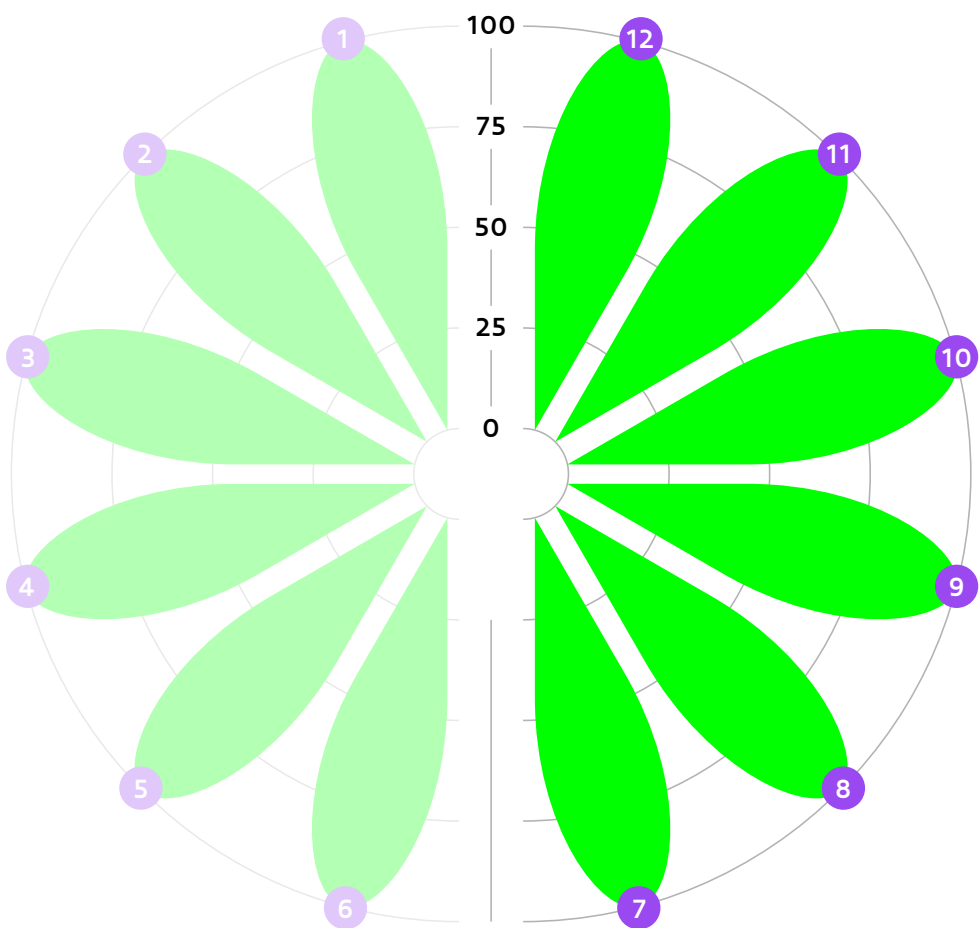
Challenges in data safety are more evident in middle-income countries, while cyberbullying needs more policy action around the world.

The top performers in the cybersafety pillar are the United States, France, and Singapore. The United States, Saudi Arabia, and the United Kingdom lead in cybersecurity commitment. More secure internet servers are found in wealthier nations. Australia, China, and Canada lead in user strategies to protect personal data. The United States leads in cyberbullying and cybersafety policies, followed by Canada and France. Across most countries, policies focused on parents are well established. These include resources and digital safety toolkits for parents to deal with cyberbullying. However, policies focused on children and youth, such as e-safety guidelines and provisions for cyber wellness in education curriculum, are less common.

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01   Refers to the "Right to disconnect" is defined as the right not to engage in work-related electronic communications during non-work hours.

Capturing Opportunities

The "Capturing Opportunities" sub-index/component examines six pillars comprising enablers of digital adoption and opportunity across a range of contexts. This component captures the pre-requisites for adopting digital technologies and the extent to which opportunities are maximized.

1 Social Cohesion

2 Mental Health

3 Physical Health

4 Ability to Disconnect

5 Information Quality

6 Cybersafety

7 Connectivity

8 Social Connectedness

9 Education and Skills

10 Work, Productivity, and Income

11 Entertainment and Culture

12 Access to Services and Goods

For the Capturing Opportunities component, data collected for the DWI reveals:

Digital interaction does not always lead to meeting people offline, and some of the least affluent countries are the most dynamic in online activism.
The strongest social connectedness is evidenced in the United Arab Emirates, Chile, Bulgaria, Colombia, and Malaysia. Social media engagement averages 68% across all countries, with advanced economies leading. Meeting new people using digital devices is less common in high-income nations (35%) compared with upper-middle-income (55%) and lower-middle-income countries (59%). China and India lead in online engagement, while Nigeria and Kenya are leaders in online activism. Generally, emerging economies score higher in active online engagement and activism.

Middle-income countries embrace online education and training, but still have a journey ahead in integrating digital skills (e.g. using digital safety tools, ability to verify misinformation) in curricula.
Estonia leads the education and skills pillar, followed by Indonesia, the Republic of Korea, Singapore, and Kenya. While this reflects a mix of income levels, richer countries generally score higher. Internet access in schools is led by advanced economies, and less affluent nations face challenges in integrating digital skills. Most countries recognize micro-credentials, indicating a widespread trend among both employees and employers to be more open to new types of qualifications. Middle-income countries show strong engagement with digital tools in education, and digital device use for accessing information is also high across this group.

Advanced economies lead in work flexibility, while digital technologies and regulation allow middle-income countries to participate more fully in the knowledge economy.
Estonia, Singapore, Australia, and the United Arab Emirates lead in the work, productivity, and income pillar, with upper-middle-income countries outperforming high-income ones on average. Less affluent countries — including India, Viet Nam, and Bangladesh — have ample room for growth. Remote work frameworks are more advanced in richer nations, while digital nomad visas[02] are prominent in middle-income countries such as Argentina, Colombia, and Brazil. Estonia and Singapore have some of the strongest tech sectors. Ghana and Kenya, meanwhile, have growing tech sectors, demonstrating how the digital economy can empower emerging economies.

Digital technologies are democratizing access to art and entertainment.
Argentina leads in the entertainment and culture pillar, followed by Estonia, the Republic of Korea, India, and Sweden. The DWI notes widespread government support for digital tourism and culture, particularly in wealthier countries. Estonia stands out in experiencing art digitally, while China leads in using technology for creating and sharing art. Middle-income countries generally report greater use of digital devices for consuming artistic and cultural content online compared to their high-income counterparts.

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02 "A digital nomad visa is a type of visa that allows you to work remotely for a country registered outside of the country you have chosen to currently live in. Typically, to work in another country, you must have a work permit, and be registered as a taxpayer. This requires you to uproot your entire life back home. Digital nomad visas, on the other hand, have the benefit of becoming a temporary resident of another country, while you work (and pay taxes) in your home country. In the majority of cases, digital nomads are not required to pay taxes in their host country." Source Schengen Visa Info https://www.schengenvisainfo.com/digital-nomad-visa/

There is widespread availability of key digital services for the population, but participatory policymaking remains nascent in some countries.

Seventeen out of the 35 countries have a telecom or ICT regulator for managing digital applications such as e-health and e-education. Meanwhile, Estonia leads in access to services and goods, followed by China and Singapore, with advanced economies dominating the top half of the list. China excels in overall digital health engagement, with lower-middle-income countries surpassing their higher-income counterparts. Digital payments have a 71% engagement rate globally. China leads in online shopping (80%), while Sweden and the United Kingdom do well in managing finances online, additionally, Estonia, Sweden, China, and Colombia show strong engagement with transportation technologies (e.g. car sharing or public transport apps).

Universal internet access is a goal around the world, but some disparities highlight the need for further government support.

The United Kingdom, followed by Canada and France, leads in social cohesion, which focuses on universal access policies, digital literacy for all, and digital inclusion). Almost all countries have universal access and service policies, while 16 countries, mostly high-income, feature comprehensive regulatory frameworks for information and communications technology accessibility. Digital literacy initiatives outside formal education show progress across countries, with notable examples in middle-income countries. The International Telecommunication Union gender parity score indicates that more women than men use the internet in some affluent countries, while Germany, the United Kingdom, and Estonia lead in socio-economic inclusion.

Some countries still require infrastructure investment to reach universal connectivity.

The United Arab Emirates, Saudi Arabia, and Kuwait excel in connectivity, with Malaysia and Bulgaria challenging the notion that only the wealthiest economies provide comprehensive connectivity. Despite widespread 4G coverage, some emerging economies face challenges in network infrastructure. Internet penetration rates vary significantly, with high-income countries at 93%, upper-middle-income countries at 79%, and lower-middle-income countries at 53%. Affordability issues reflect economic disparities, with people in richer nations spending less than 0.1% of their income on connectivity, compared with 2.3% and 5.4% in upper-middle and lower-middle-income countries.

sync

Sync is a digital wellbeing initiative by King Abdulaziz Center for World Culture (Ithra) with a vision to create a world where we are all in control of our digital lives.

The program is guided by extensive research - in collaboration with global entities - to understand the implications of technology and how it's affecting our lives, and translate the knowledge we gain into awareness campaigns, tools, experiences, educational content and programs aiming to raise global awareness around the topic.

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