Ithra Digital Wellbeing

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Country Report

Indonesia

Country insights report 2024

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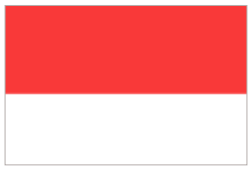


Indonesia

Overall score
54.5 (out of 100)

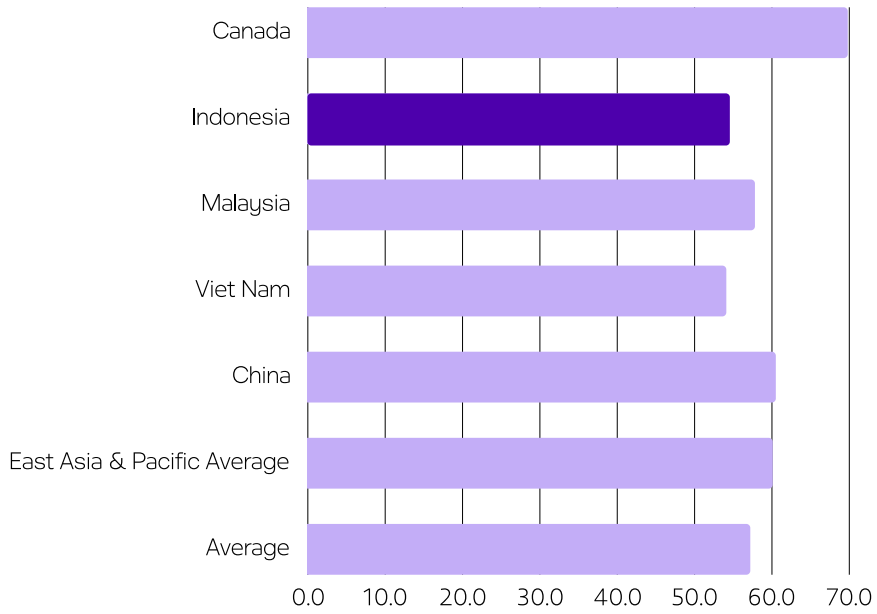
Placed
23rd (out of 35)

The Digital Wellbeing Index (DWI) showcases both strengths and areas for potential growth in Indonesia's digital landscape. With an overall score of 54.5, Indonesia placed 23rd among the 35 countries analyzed. The country is stronger in the "Capturing opportunities" pillars of the index, demonstrating strength in the education and skills pillar. The "Balancing needs" pillars present room for improvement, particularly in cybersecurity" and mental health.

With a score of 54.5, Indonesia is seventh out of eight countries in the South Asia and Pacific region. The country falls slightly below the DWI average (57.2). Its scores indicate room for improvement in digital wellbeing.

Comparative performance in the DWI

FIGURE 1



Source: Global Digital Wellbeing Index 2024

The context of digital wellbeing in the country

As a result of the COVID-19, Indonesia has placed a focus on accelerating their digital transformation. This largely focused on healthcare, with Indonesia announcing their "Transform Health Indonesia" policy, aiming to transition to a fully digitalized and integrated primary healthcare system by 2030. The program focuses on empowering marginalized communities, youth, women and frontline healthcare workers to engage with the government and donors, urging them to prioritize equitable adoption of digital technologies for Universal Health Coverage by 2030.

Various healthcare applications were developed and released during the pandemic in Indonesia and have become widely used in the country. The Ministry of Communication and Information Technology reported that the use of their healthcare applications had increased by 443% since the Covid-19 pandemic. Today they are helping the government to encourage herd immunity for the Indonesian people by providing vaccine service and information through the platform alongside other healthcare programs.

The pandemic acted as a catalyst for digital transformation, aligning with President Joko Widodo's directive to capitalize on their momentum and increase Indonesia's digital competency following the progress in digital healthcare. In 2020, the government announced five priorities within this transformation: infrastructure development, a National Data Center, human resource enhancement, digital economy consolidation, and legislative support. Initiatives range from expanding internet access in remote areas to fostering digital literacy, supporting MSMEs online, and advancing digital legislation.

In 2023, Indonesia announced "Digital Indonesia Vision 2045" following on from their rapid post pandemic digital transformation. There are three main pillars to this plan:

1. Encourage digital transformation of the Indonesian government, economy and society to become a global leader with strong and sustainable competitiveness.
2. Building an inclusive and collaborative digital ecosystem supported by an innovation-based economy, tech-enabled government and smart society.
3. Realizing an advanced and prosperous Indonesia through the development of an inclusive and digitally empowered economy, government and society.

To address the skills gap in digital leaders, the plan aims to attract technopreneurs and startup founders to collaborate in developing Indonesia's digital capabilities. Indonesia has also modelled various initiatives from their neighboring nations who have invested in digital capabilities before them. For example, learning from Singapore's national level e-Gov services which have helped to streamline government services and improve the accessibility for its citizens.

Various international organizations have become interest in the Indonesian government's commitment to a digital future and the potential of its economy, investing in its digital infrastructure. In 2023, The International Labour Organization (ILO) initiated the second phase of the "Promoting Small and Medium Enterprises through Entrepreneurs' Access to Financial Services" program in Jakarta. The initiative emphasizes four key strategies: improving SMEs' productivity through digital technology, supporting digital technology adoption by regional banks, enhancing the SME value chain ecosystem through digitalization, and collaborating with regional governments to support SMEs and financial services. Resulting improvements to the digital infrastructure in Indonesia ensure that its digital future looks promising

The country's strengths and areas for improvement

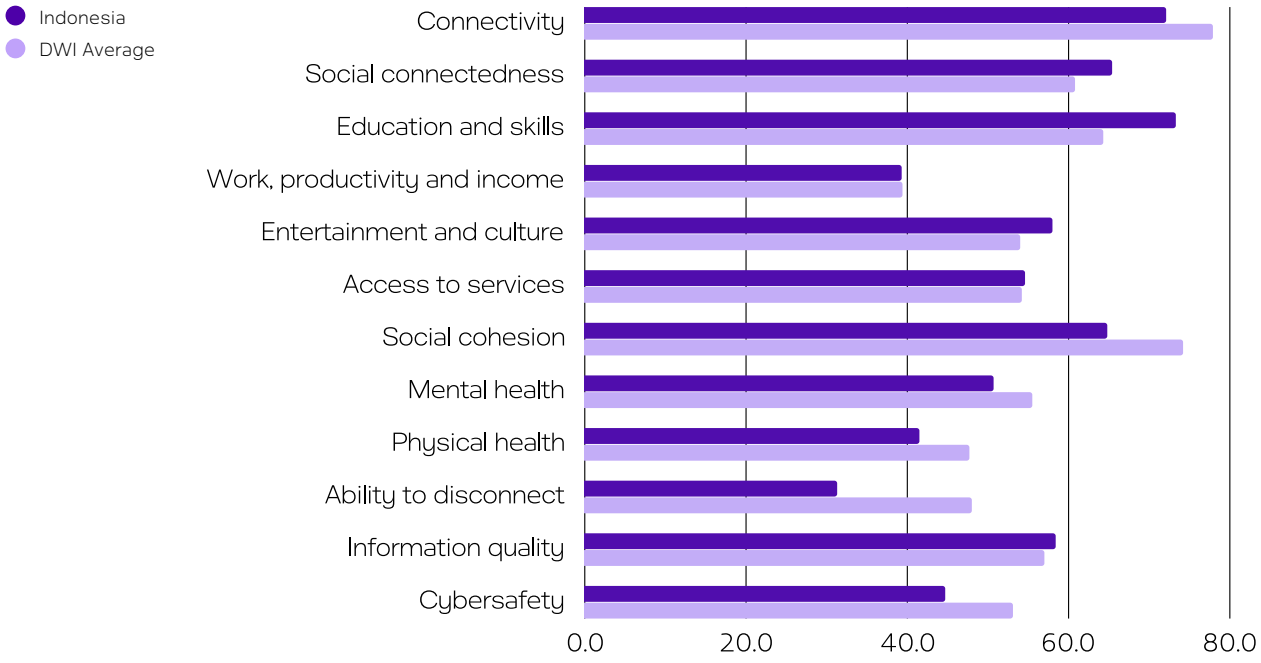
A significant strength of Indonesia is within the education and skills pillar, with a score of 73.3 (second). This reflects a developed digital education ecosystem, including new forms of sharing knowledge, learning and access to information. Another strength lies in the social connectedness pillar with a score of 65.4 (eighth), indicating an ability for Indonesians to maintain digital connections with family and friends alongside wider social and professional communities. Moreover, the index scores for the information quality pillar are high, placing Indonesia 11th out of the 35 countries, which suggests that citizens can apply critical thinking when navigating online information and identifying credible sources.

The index showcases various areas for improvement for the Indonesian digital landscape. The connectivity pillar score is 72.1 (27th) which indicates room to improve the general access to technology and the internet of citizens. Within this digital ecosystem, cybersafety also scored 44.7 (29th). Poor digital safety may create barriers to online engagement for citizens and may have knock-on effects on other indicators. Moreover, with a relatively low score in social cohesion (26th), more can be done to ensure that citizens from different demographics have equal access to technologies.

FIGURE 2

Source: Global Digital Wellbeing Index 2024

Performance of Indonesia by index pillars compared to DWI sample



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	72.1	27	Despite 96.2% of the population being covered by internet, only 66.5% of citizens use the internet. Moreover, international bandwidth has room for improvement.
Social connectedness	65.4	8	Use of social networks is high, with 80.2% of the population using a platform and user engagement above the index average. Moreover, technology is used by a large proportion of the population to stay connected with friends and family as well as meeting new people.
Education and skills	73.3	2	Interment and digital technology exposure has been successfully implemented in the education system, with survey respondents reporting high levels of digital content in lessons. Respondents also reported using digital tools to access online learning and skills training outside of formal education.
Work, productivity and income	39.3	18	While survey respondents reported the use of digital technologies for entrepreneurial activities and productivity, job searching appears to be less digitalized. There are far higher numbers graduating tertiary education with ICT qualifications compared to the DWI average. Although this may not result in an active tech community, according to low Github activity from Indonesia. Support for remote workers is also moderate, with no official law recognizing digital nomads.
Entertainment and culture	58.0	15	Arts, culture, leisure and entertainment all score above the DWI average. The government actively promotes art and culture, with 40% of survey respondents reporting creating and sharing creative work online. Digital devices also are important sources of entertainment with 83.9% of respondents using technology to engage in streaming, gaming and reading.
Access to services and goods	54.6	19	E-Gov services score highly with relatively strong digital government services and high engagement rates. E-Health is more moderately rated, with only 28% of respondents measuring their health and fitness digitally. Improvement can be made in digital finance and commerce, with low levels of survey respondents engaging in digital payment activity and shopping.
Social cohesion	64.8	26	While access policies for the vulnerable are strong, there is room for improvement in tackling gender and socio-economic imbalances in digital access and competency, including creation of policies to ensure children from remote areas equal access to digital learning.
Mental health	50.7	27	Addictive behaviors such as gaming and excessive social media use are below the DWI index average. While there was a belief in survey respondents that there was help available for addictive online content, government digital strategy does not directly address online addictions.
Physical health	41.5	21	Lower levels of physical inactivity are combined with 56% of respondent's not engaging in healthy habits due to digital technology. Moreover, there is room to improve on policies to improve physical impacts of digital use.
Ability to disconnect	31.3	27	While survey respondents reported an ability to maintain a healthy work/life balance when working or studying remotely, low numbers reported taking measures to ensure their physical and mental wellness
Information quality	58.4	11	While the government has released information on dealing with disinformation, this has not been transferred into the education system. Although, survey respondents did indicate taking active approaches to analyse the sources their information comes from.
Cybersafety	44.7	29	There is room for improvement in creating policies for cybersafety in the youth. There are above average levels of responses suggesting health impacts from online bullying. While there are moderate levels of data protection skills in the population, they experience high cyberthreat exposure.

Suggestions that may contribute to improvements across the digital ecosystem:

Inclusive remote learning initiatives
Ensure that isolated regions have access to technologies that support learning such as computers and tablets. These could be placed in schools or libraries to ensure equal and fair distribution among the population. Furthermore, design initiatives that support demographics with lower current digital representation in line with the initiatives set up under the five priorities in 2020. In order to engage more women and lower socio-economic background, content could be designed to upskill digital literacy alongside initiatives to promote wider digital accessibility.

Remote workers' rights
Ensure a more active remote community, recognizing digital nomads by law and supporting their stay via specific visas. This will help to build a more active tech community and prevent the high numbers of those educated in ICT skills from not using their skills in Indonesia. Creating this community will add to "Digital Vision Indonesia 2045" and foster an environment where remote workers and digital nomads remain in the country, actively upskilling the community around them.

Education on mental and physical health impacts of digital usage
Direct policies towards educating Indonesians about the impact of excessive digital activities on their physical and mental health. Initiates may be directed through the education system as well as well as through public health campaigns in the health applications that are used by large majorities of the population. It may be useful to include information about measures to ensure digital wellness given the low numbers of survey respondents that reported making efforts to do this in their daily lives.

Protecting youth online
Creating policies that protect the young online are important to controlling addiction and exposure to harmful content. Campaigns can be launched within formal education and the "Digital Vision Indonesia 2045" framework to bring awareness about being safe online including the long-term effects of certain types of content. Furthermore, designing reporting mechanisms for cyberbullying will help to mitigate the impacts that cyberbullies can have on their victims.

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.

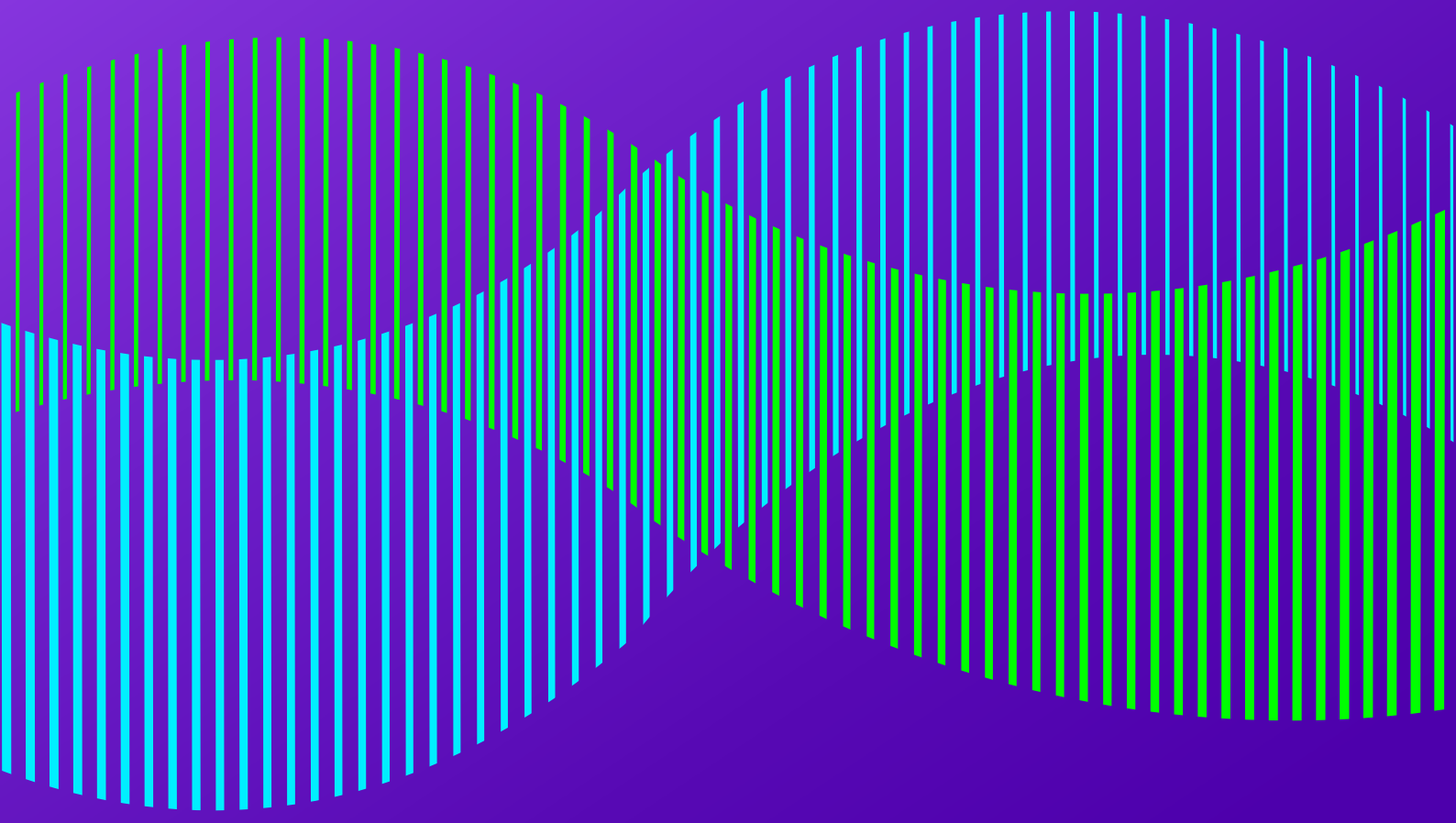


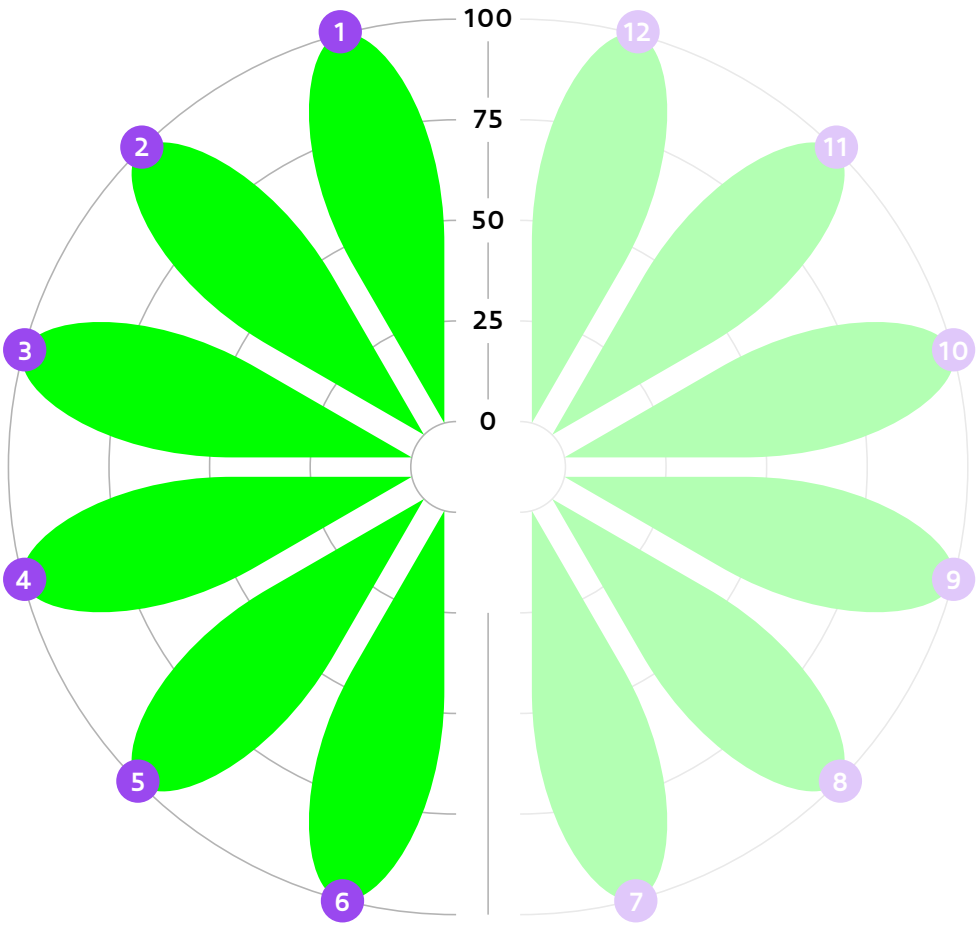
TABLE 1
Source: Global Digital Wellbeing Index 2024

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
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 Balancing Needs component, data collected for the DWI reveals:

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.

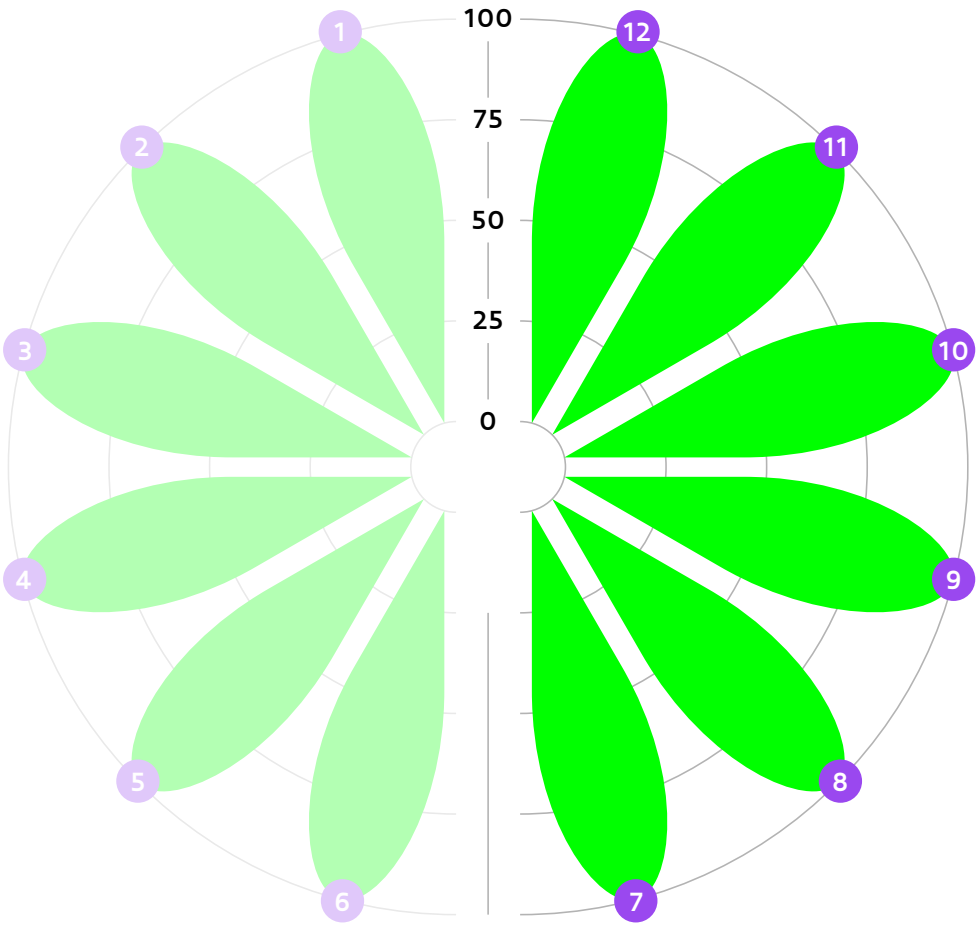
Challenges in data safety are more evident in middle-income countries, while cyberbullying needs more policy action around the world.

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.

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.



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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.

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.

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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.

sync.ithra.com