

Teleuse at the bottom of the pyramid *data booklet*

Findings from a six-country study in emerging Asia

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bottom of the pyramid
data booklet

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Who are the BOP?

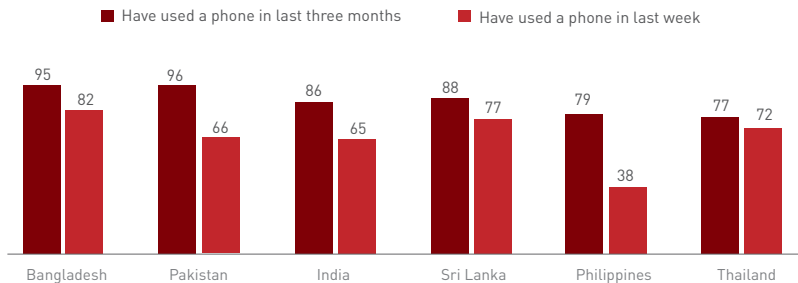
This study classifies the “bottom of the pyramid” (BOP) as those belonging to socio-economic classification groups D and E* (the bottom two).

Roughly, these people coincide with those earning less than USD2 per day, on average.

The study looks at teleuse among 15-60 year-olds at the BOP.

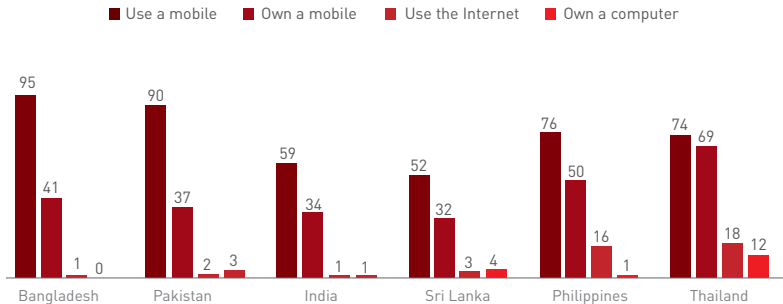
* In the Philippines, the BOP is defined as SEC group E only. Tribal areas in Pakistan and conflict areas in India and Sri Lanka are excluded from the study.

Use of the phone (% of BOP)

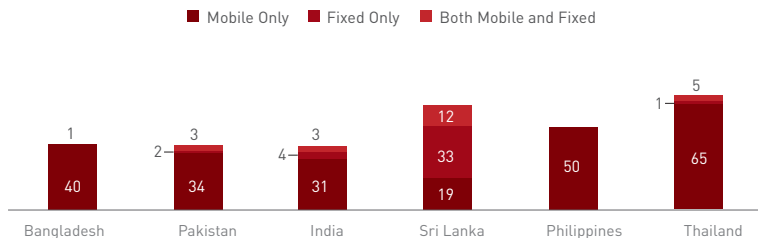


Teleusers were defined as those who had used a phone to make or receive a call at all in the three months preceding the survey. Usage could have been through any kind of phone (mobile, fixed, public, work phone, etc); includes usage that is paid for as well as free-of-charge.

ICT use versus ownership (% of BOP)



Type of phone owned (% of BOP households)



Total phone ownership [% of BOP households]*					
41%	39%	38%	64%	50%	70%

Fixed phone ownership considered on a household basis.
Mobile phone ownership considered on an individual basis.

* Numbers may differ due to rounding

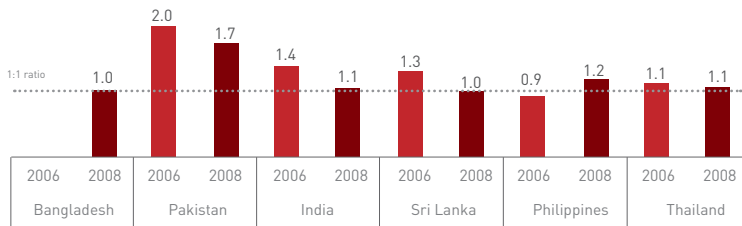
Growth in multiple SIM ownership

(% of BOP mobile owners who own more than 1 SIM card)

	Bangladesh	Pakistan	India	Sri Lanka	Philippines	Thailand
2006	-	12%	5%	9%	9%	1%
2008	10%	23%	9%	16%	19%	13%

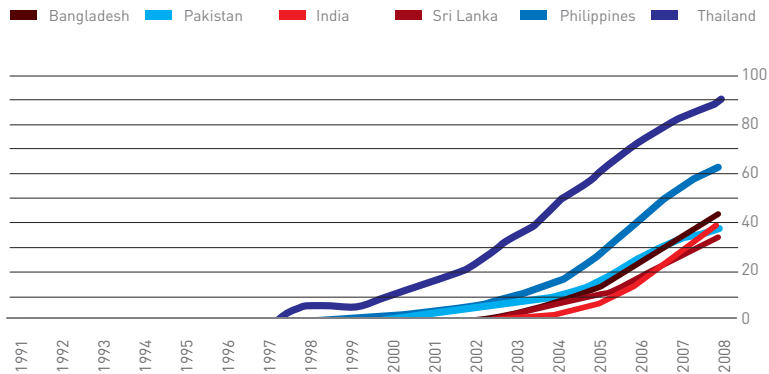
2006 data from Teleuse@BOP2 survey. 2006 data not available for Bangladesh.
Excludes SEC D teleusers in the Philippines.

Change in urban-rural phone ownership divide (Urban: rural)



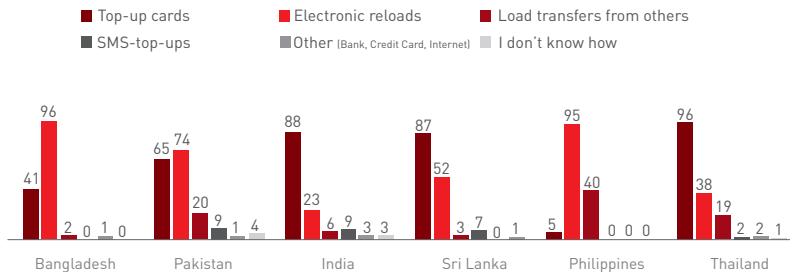
2006 data from Teleuse@BOP2 survey. 2006 data not available for Bangladesh.
Excludes SEC D teleusers in the Philippines.

Growth in mobile ownership (% of BOP teleusers)



	Bangladesh	Pakistan	India	Sri Lanka	Philippines	Thailand
Got connected in the 12 months preceding survey (% of BOP mobile owners)	22	13	26	23	14	8

Prepaid mobile top-up method (% of BOP prepaid mobile owners)



98.6 percent of BOP mobile connections are prepaid on average across the study countries.

Ways that mobiles are used (% of BOP mobile owners)

To make phone calls

To receive phone calls

To send/receive missed calls

To send/receive SMS

To send/receive MMS

To send/receive emails

To browse the Internet

To take photos /video clips

To play games (individually)

To play games (interactively)

To listen to the radio

To listen to music (files which have been downloaded or sent by others, excluding radio)

To share content that you have created (ringtones, wallpapers, pictures, games and video clips)

To share or down/upload other content (e.g., ringtones, wallpapers, pictures, games and video clips)

As an organizer (appointments, reminders, alarm, clock etc)

For balance/bill-checking

Ways that mobiles are used (% of BOP mobile owners)

	Bangladesh	Pakistan	India	Sri Lanka	Philippines	Thailand
	100%	100%	99%	100%	89%	100%
	100%	100%	98%	100%	99%	100%
	94%	84%	84%	73%	86%	39%
	32%	47%	33%	52%	100%	53%
	1%	4%	4%	6%	13%	4%
	0%	0%	1%	0%	0%	1%
	0%	1%	1%	2%	0%	2%
	4%	2%	1%	8%	4%	18%
	13%	18%	7%	21%	14%	17%
	1%	1%	1%	1%	3%	1%
	0%	7%	3%	12%	5%	22%
	4%	5%	3%	7%	3%	22%
	1%	2%	2%	6%	5%	3%
	0%	2%	3%	8%	10%	9%
	1%	7%	8%	4%	9%	14%
	11%	40%	25%	50%	3%	39%



Teleuser profile: Ronnie | Manila, Philippines

27 years | Shop assistant / Barbecue vendor / e load seller

Downloads ringtones as well as has ring-back tones on her phone; these expire within 24 hours, so she does this frequently.

Also downloads these from the Internet at a cybercafé too.

04-Feb-2009

0:33 AM

SINGLE LADIES MP3

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More MP3s, all FREE!

avalanche (David Cook)

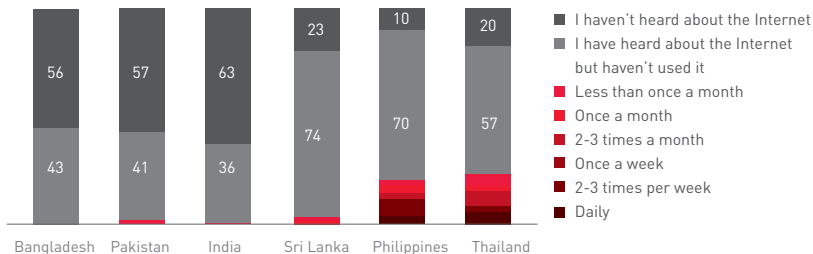
When She Cries

(YMP)

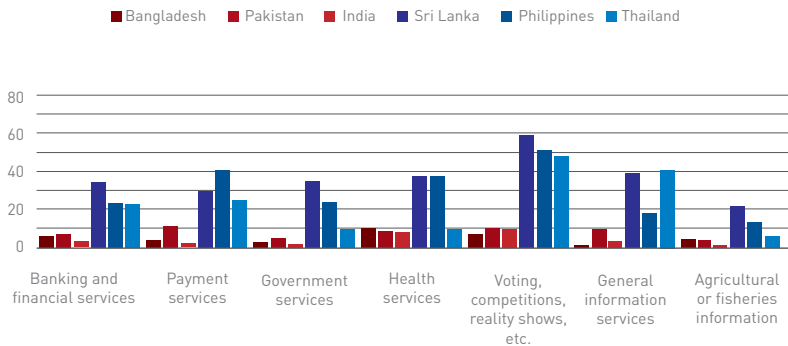
Options

Back

Internet use (% of BOP teleusers)



Awareness of “Mobile2.0” services available on phones and computers (% of BOP teleusers)



Usage of “Mobile 2.0” services (% of BOP teleusers who are aware of services)

	Bangladesh		Pakistan		India	
	Regularly	Not Regularly	Regularly	Not Regularly	Regularly	Not Regularly
Banking and financial services	0%	5%	2%	10%	1%	17%
Payment services	0%	9%	5%	15%	5%	11%
Government services	0%	7%	1%	7%	2%	2%
Health services	0%	10%	2%	8%	2%	14%
Voting, competitions, reality shows, etc	0%	4%	1%	6%	6%	7%
General information services	*	*	5%	12%	3%	15%
Agricultural or fisheries information	0%	5%	2%	5%	4%	1%

Table continues overleaf

* Numbers too small for statistical analysis

Usage of “Mobile 2.0” services
 (% of BOP teleusers who are aware of services)

	Sri Lanka		Philippines		Thailand	
	Regularly	Not Regularly	Regularly	Not Regularly	Regularly	Not Regularly
Banking and financial services	0%	6%	1%	6%	1%	13%
Payment services	0%	12%	4%	8%	6%	17%
Government services	1%	7%	0%	7%	1%	1%
Health services	0%	22%	2%	5%	0%	17%
Voting, competitions, reality shows, etc	1%	8%	1%	14%	2%	17%
General information services	0%	8%	2%	10%	11%	26%
Agricultural or fisheries information	0%	3%	3%	4%	2%	5%

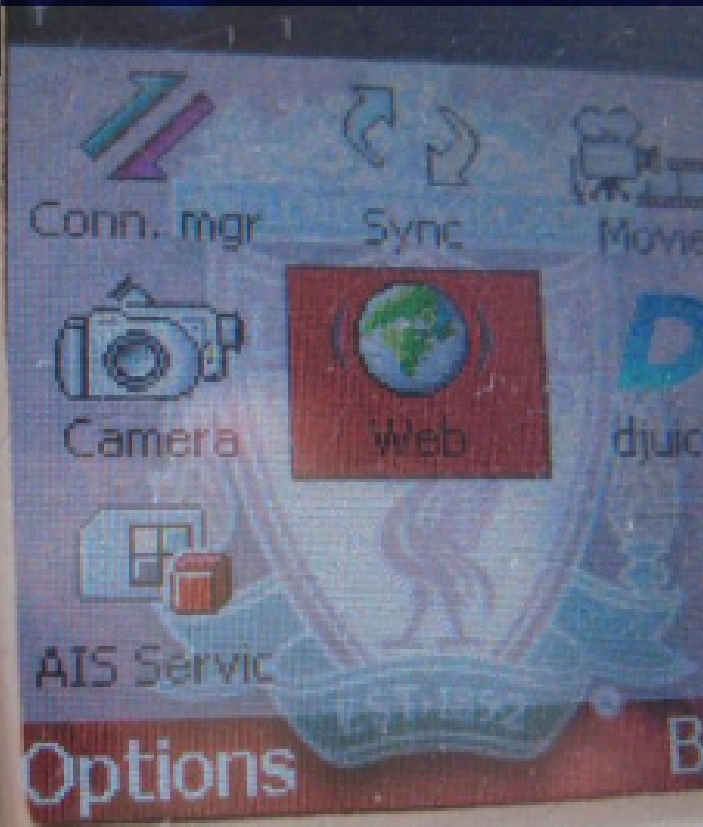
Those that don't use them say so because they either don't know how to use the services, they don't think that they are applicable to them, or they find them too expensive, especially when the same service or information is available free through other modes.

Teleuser profile: Dinn | Automobile mechanic

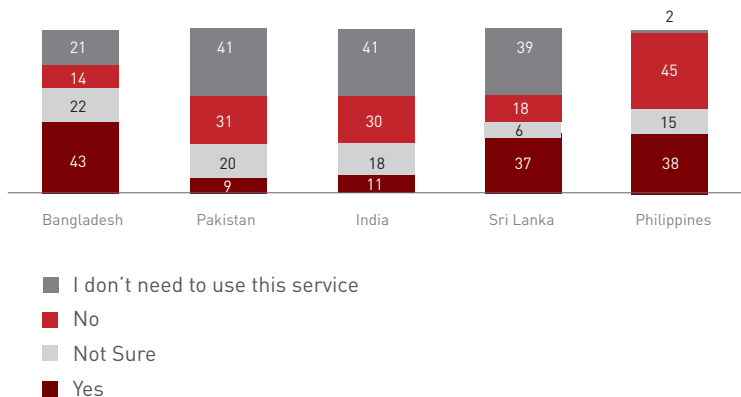
15 years | Jae Hom, Thailand

Previously subscribed to sports news on his mobile, until he felt that the service was not worth spending on, since the same information is available for free on the TV and Internet.

Tried using the Internet on his mobile, but lost all his credit (THB50) in less than 5 minutes. He no longer uses it on his mobile. Instead, he goes to a cyber café and downloads ringtones, wallpapers and themes for his mobile and uploads his mobile photos to his Hi5 page. A two-hour visit only costs him THB20.

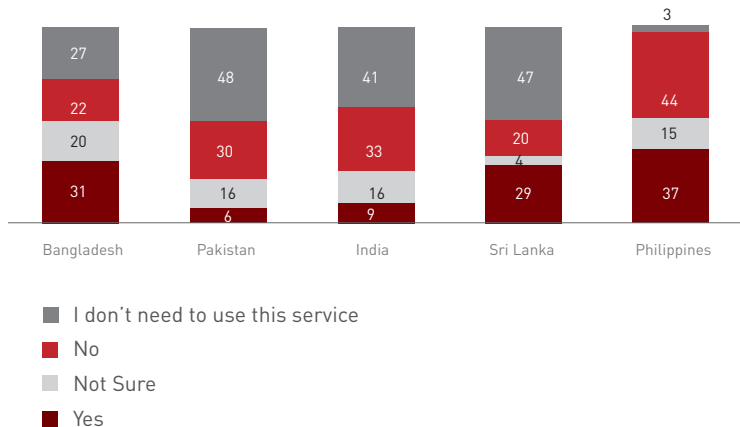


Willingness to try money transfer services via a mobile phone [% of teleusers who are unaware of such services]



Data for Thailand not available.

Willingness to try accessing government services via a mobile phone [% of teleusers who are unaware of such services]

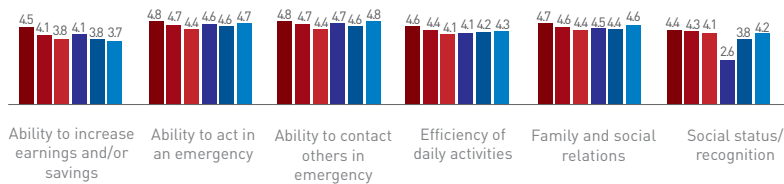


Data for Thailand not available.

Perceived benefits of telecom access (general; average rating)

1 = worsened 2 = slightly worsened 3 = no change 4 = slightly improved 5 = improved

■ Bangladesh ■ Pakistan ■ India ■ Sri Lanka ■ Philippines ■ Thailand

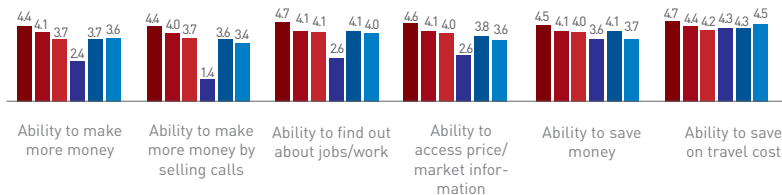


Among BOP teleusers (owner and non-owners-users) with personal incomes > 0
Teleusers were asked to rate on a scale of 1-5, how telecom access had improved each aspect of their lives.

Perceived benefits of telecom access (livelihood-related; average rating)

1 = worsened 2 = slightly worsened 3 = no change 4 = slightly improved 5 = improved

■ Bangladesh ■ Pakistan ■ India ■ Sri Lanka ■ Philippines ■ Thailand



Among BOP teleusers (owner and non-owners-users) with personal incomes > 0

Teleusers were asked to rate on a scale of 1-5, how telecom access had improved livelihood-related aspects of their lives.

Teleuser profile: Zayed | Shopkeeper

21 years | Sonargaon, Bangladesh

Sole reason for obtaining mobile was to expand his business.

Mobile has helped him reduce travel time and cost, remotely coordinate matters at the shop, increase business and expand business network.

Previously travelled twice a month to Dhaka to order stocks, costing a min. of BDT500 (USD7) + ~23 hours + two day's worth of lost business each month.

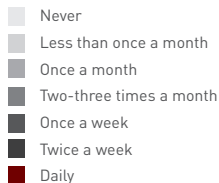
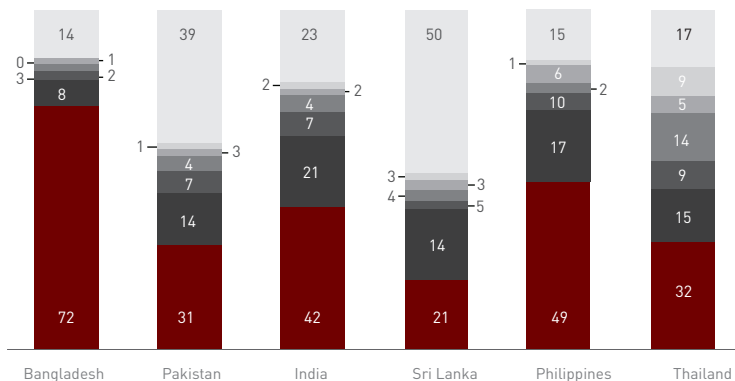
Now communicates with suppliers via mobile; stocks are delivered to him, giving a net saving of BDT 460 (USD 6.44) + ~23 hours per month.

Monetary + time savings allowed him to start new poultry business. Plans to start reload business too.

Once facilitated money "transfer" through mobile top-up for the village "maulavi" while away in Dhaka; the maulavi sent BDT1,000 to Zayed's mobile, who then paid the same in cash to the maulavi's family in the village.



Use of the phone for financial, business or work-related purposes [% of BOP mobile owners]



Teleuser profile: Ronnie | Manila, Philippines

27 years | Shop assistant / Barbecue vendor / e load seller

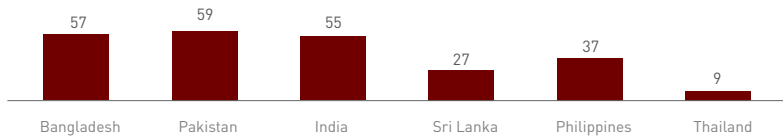
Coordinates with shop owner and suppliers, places orders, checks prices and coordinates supply pick-up via text.

Prefers coordinating orders via text since it provides written records and confirmations, unlike voice communication.

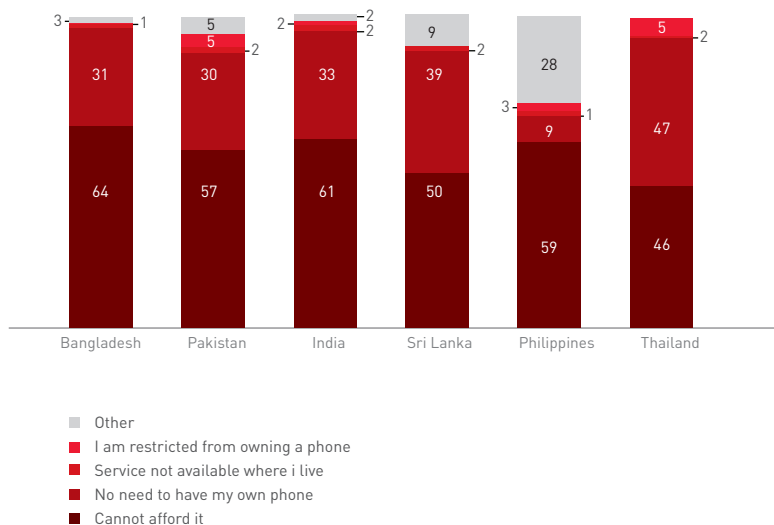
Recently started e load business; earns PHP 100 for every PHP 1,000 sold.



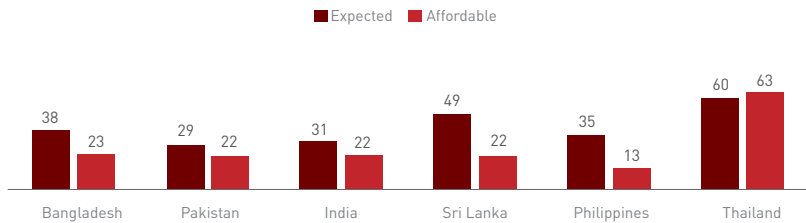
Non-ownership (% of BOP teleusers)



Key reason for not owning a phone (% of BOP non-owners)

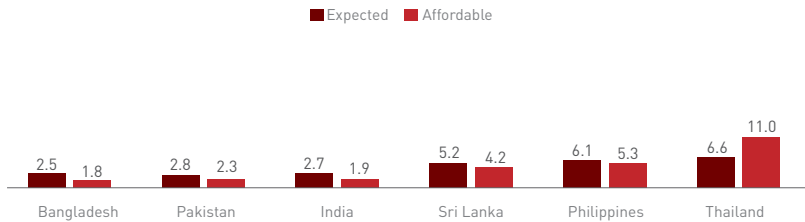


Perceptions of initial cost of getting connected: What the cost is expected to be vs. what is affordable (USD)



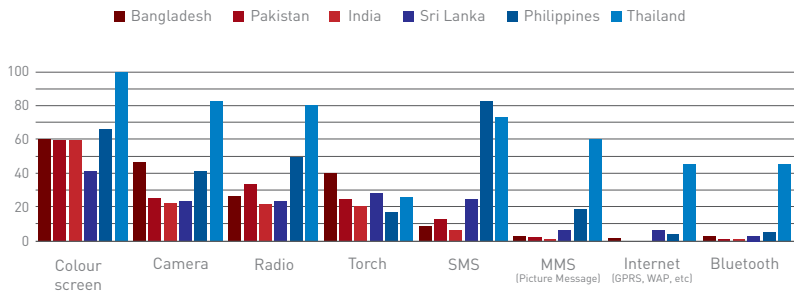
Asked from current non-owner users. Includes handset cost.

Perceptions of monthly cost of use: What the cost is expected to be vs. what is affordable (USD)



Asked from current non-owner users.

Phone features desired (% of potential BOP mobile phone owners)



Non-owner users were asked if they planned on getting connected within the 12 months following the survey; of those that said they planned to get connected through a mobile phone, they were asked what phone features were they looking for.

Study sample sizes

	Bangladesh	Pakistan ^[1]	India ^[2]	Sri Lanka ^[3]	Philippines ^[4]	Thailand ^[5]	Total
BOP teleusers	2,050	1,814	3,152	924	800	800	9,540
Margin of error (@ 95% CI) (%)	± 3%	± 2%	± 2%	± 3%	± 4%	± 4%	

[1] Pakistan: Excludes tribal regions

[2] India: Excludes five states due to internal conflicts

[3] Sri Lanka: Excludes North and East

[4] Philippines: Excludes SEC D population

[5] Thailand: Excludes Bangkok SEC D and E population

Additional 200 (approximately) studied in depth via focused group discussions, mini-ethnographies and home visits.

For more information and downloads:

<http://lirneasia.net/projects/2008-2010/bop-teleuse-3/>

This research was carried out with the aid of a grant from the International Development Research Centre, Canada and the Department for International Development, UK, with contributions from Telenor Research & Development Centre Sdn. Bhd., Malaysia.



Quantitative fieldwork was carried out between September and October 2008.

Qualitative fieldwork was carried out between January and February 2009.

Photographs by CKS Consulting Pvt Ltd (India).