

Challenges of educating for effective communication in the Internet age

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What's different?

- Audience has changed
- Media have changed
- Content has changed

- Has media education changed?

Agenda

- What do we know about the audience(s)?
 - Focus on the hardest problem: the Bottom of the Pyramid (BOP) in the Indo-Gangetic Plain
 - Findings from LIRNEasia's teleuse@BOP3 research
- What do we know about media and content?
- What should we try to achieve, and how?

How has the audience changed?

Teleuse@BOP

- **Objective: To understand how BOP interacts with ICTs (mostly phones) to better inform policy**
 - Large surveys of 'BOP' conducted in 2005, 2006, 2008
 - Almost **20,000 face to face interviews** in **6 countries** since 2005
 - Bangladesh (2008)
 - Pakistan
 - India
 - Sri Lanka
 - Philippines
 - Thailand
- Funded by the International Development Research Center (IDRC) of Canada with contributions from Telenor Research and Innovation

Methods

Quantitative

- 9,950 face-to-face interviews
- 1 week usage patterns via diary method (50% of sample)
- Sep-Oct 2008

Qualitative

- Focused group discussions
- Mini-ethnographies
- Depth interviews with migrant teleusers
- Feb-Mar 2009

- Multi-stage stratified sampling, random selection of households and individuals
- Migrant worker teleusers at “bottom of the pyramid”
 - SEC groups C** + D + E*
 - “internal” and “external” migrants that send money home
 - Findings available in March 2009

Samples

	Bangladesh	Pakistan ^[1]	India	Sri Lanka ^[2]	Philippines ^[3]	Thailand ^[4]	Total
BOP teleusers	2,050	1,814	3,152	924	800	800	9,540
Margin of error @ 95% CL (%)	± 3%	± 2%	± 2%	± 3%	± 4%	± 4%	
Diary Sample	1,025	900	1,600	450	400	400	4,775
Migrant workers	350	300	400	200	200	100	1,550

[1] Pakistan: Excludes tribal regions

[2] Sri Lanka: Excludes North and East

[3] Philippines: Survey was undertaken only among SEC E

[4] Thailand: Excludes Bangkok as the SEC DE population in Bangkok is very small

Sampling logic

- Multi-staged stratified sampling by probability proportionate to size
 - Regions (states/provinces/districts) randomly selected in 2006; kept the same for comparison in 2008 (except BN)
 - Stratification of cities within state, province etc
 - Geographical ordering of cities, villages
 - PPS selection of cities, villages
- Within PSU
 - Random starting points
 - 10 HH per starting point; right hand rule
 - KISH grid to select respondent in HH

Study locations and dates

Region	State
North	Uttar Pradesh
	Haryana
West	Rajasthan
	Gujarat
East	Bihar
	West Bengal
South	Tamil Nadu
	Karnataka
North East	Assam
	Tripura,
	Arunachal Pradesh

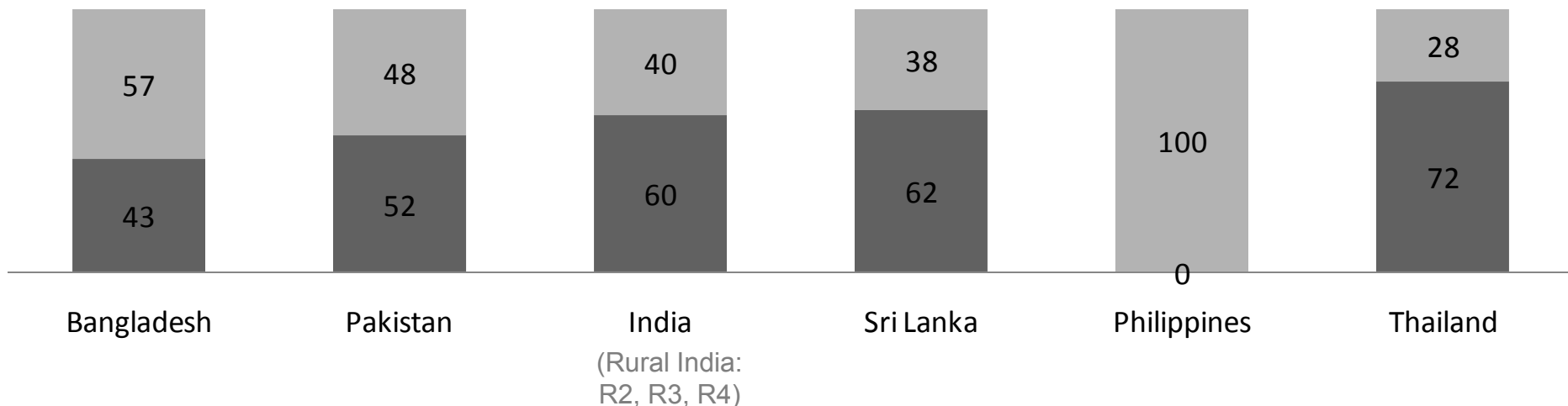
- Fieldwork between September and November 2008
 - Pakistan & Bangladesh fieldwork commenced after end of Ramadan (1st week October)

Representing **429 million** in India

- **Households with teleusers** at “bottom of the pyramid”
 - SEC groups D + E
 - Aged 15-60

Socioeconomic group classification (% of sample)

■ SECD ■ SECE



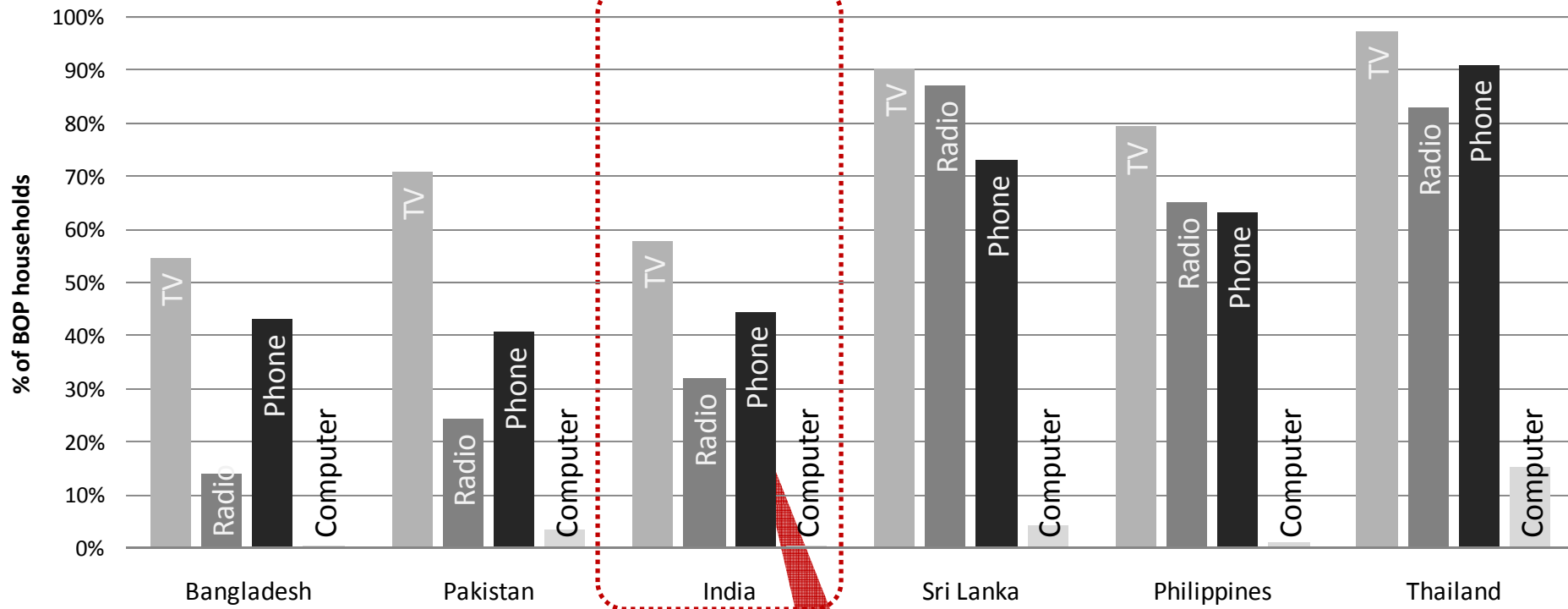
Link between SEC D+E and "\$2 per day" definition

Actual population proportions

	Bangladesh	Pakistan	India	Sri Lanka	Philippines	Thailand
SEC D+E (% of population)	73	59	69	44	38 [SEC E]	33
Less than \$2 per day (% of population)	78	85	86	45	40	28

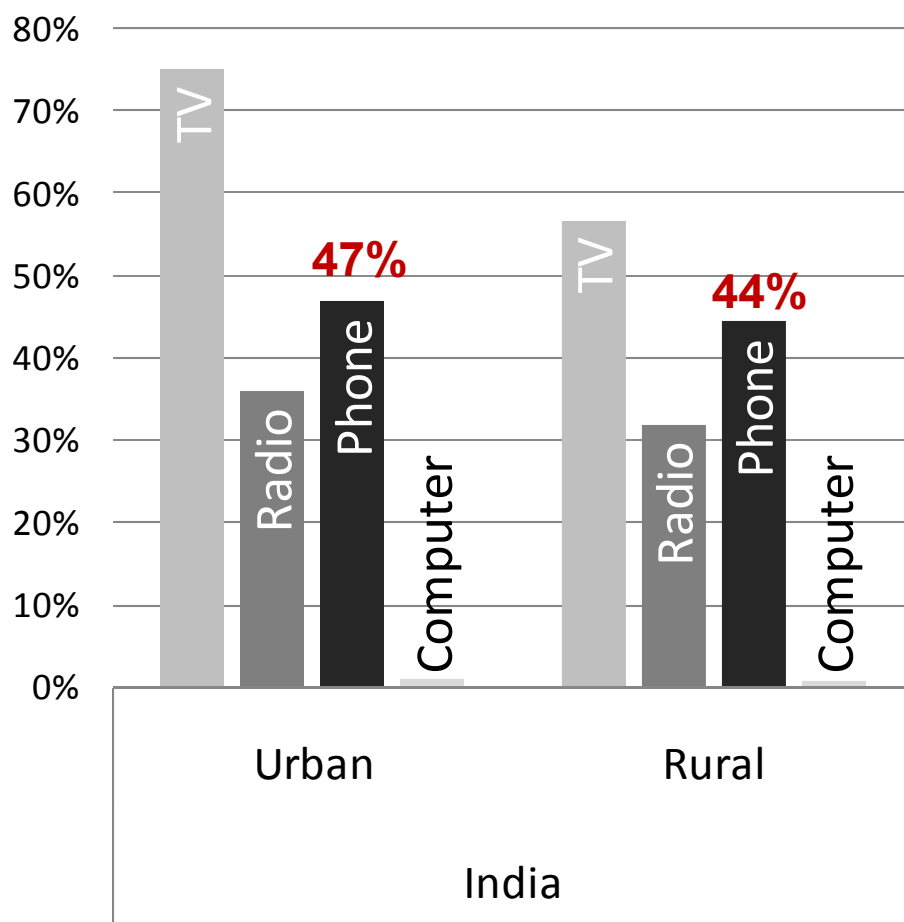
Phones have overtaken radios in BOP households in the Indo-Gangetic Plain

Access to communication technologies within the household (% of BOP teleusers)



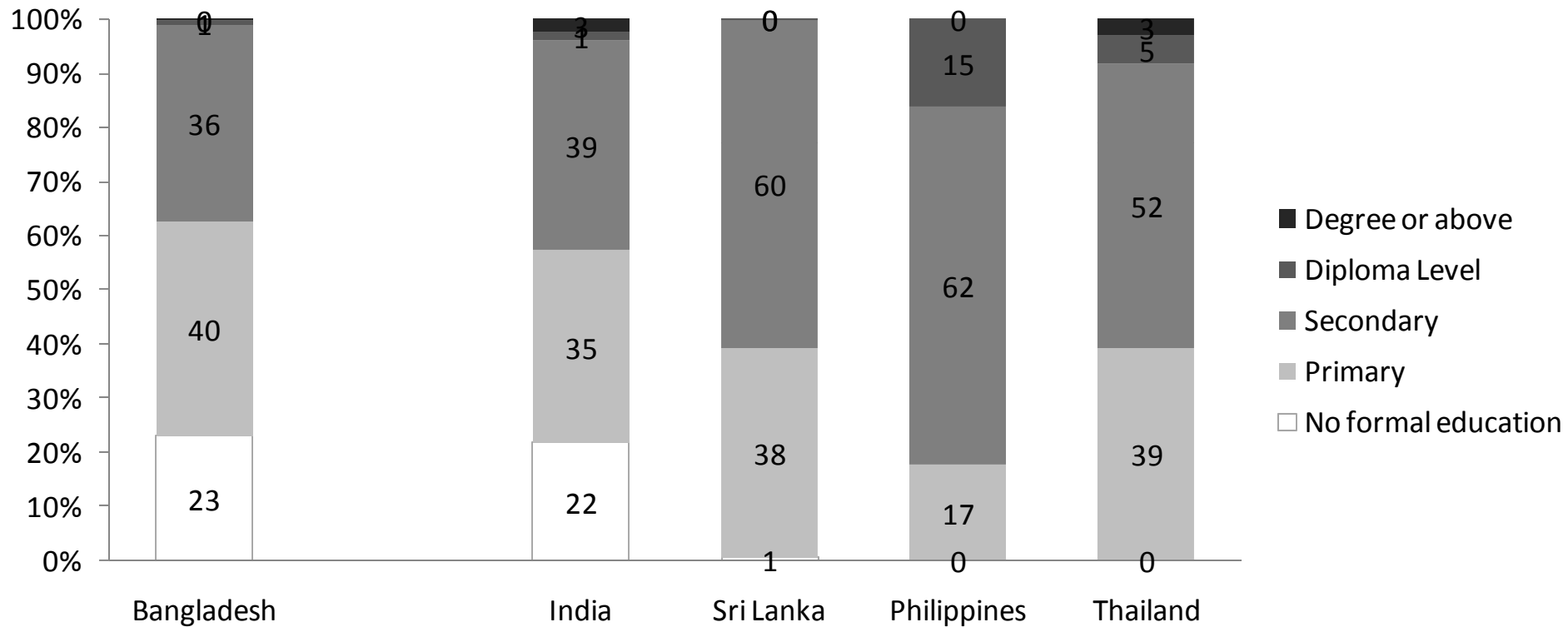
Mobile
or
fixed
phone

Access to communication technologies within the household (% of BOP teleusers)



Educational attainment does not exceed primary or secondary education

Educational attainment (% of BOP teleusers)



Recent use of the phone to make/receive calls

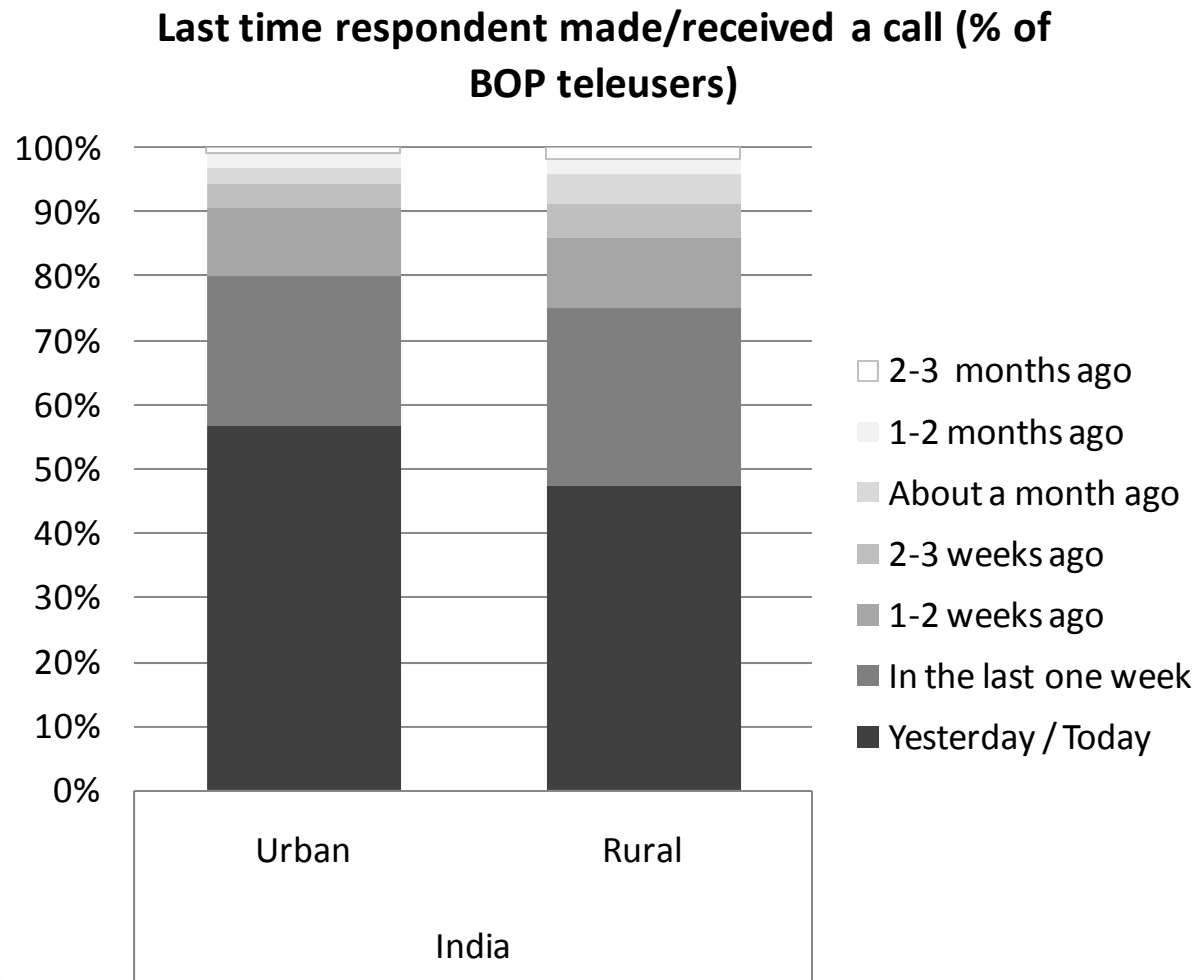
Used a phone in the last 3 months

	Bangladesh	Pakistan	India	Sri Lanka	Philippines	Thailand
% of BOP (outer sample)	95%	96%	86%	88%	79%	77%

Used a phone in the last week

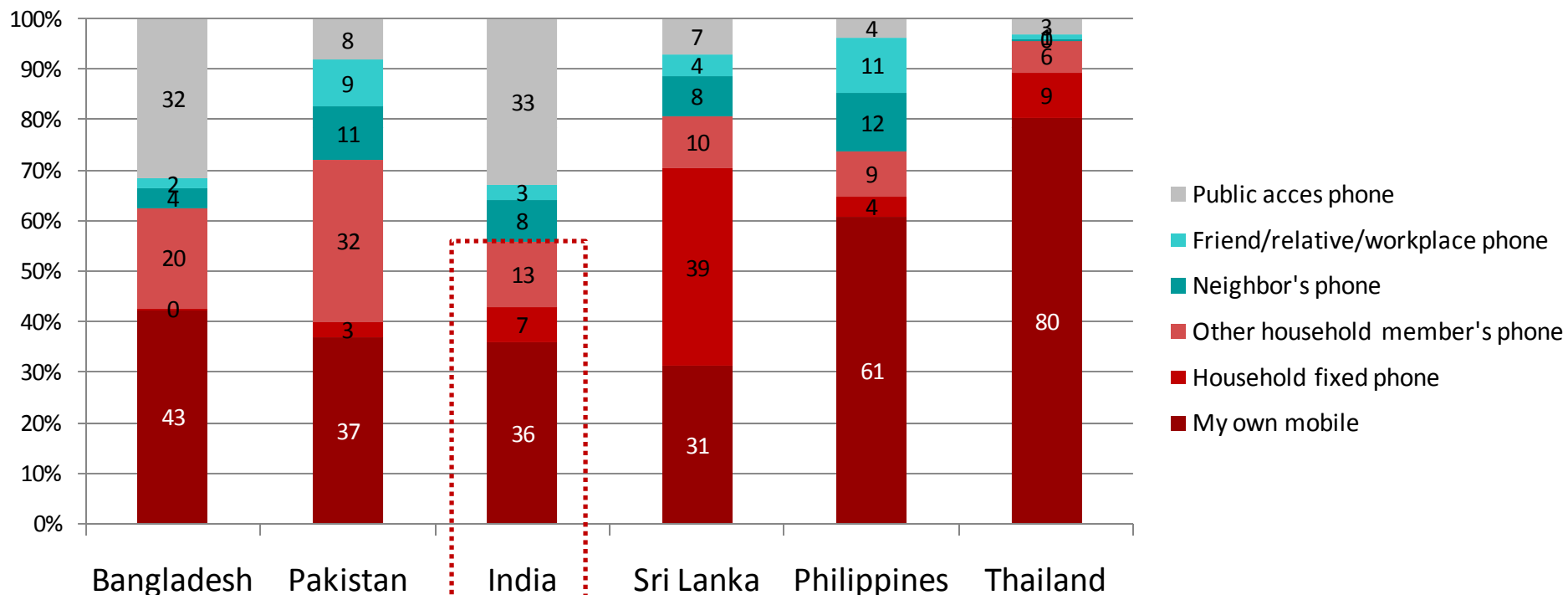
	Bangladesh	Pakistan	India	Sri Lanka	Philippines	Thailand
% of BOP (outer sample)	82%	66%	65%	77%	38%	72%

More than **two thirds of rural BOP teleusers** used a phone in the last week



Mobiles are used most as the primary phone; public phones in second place

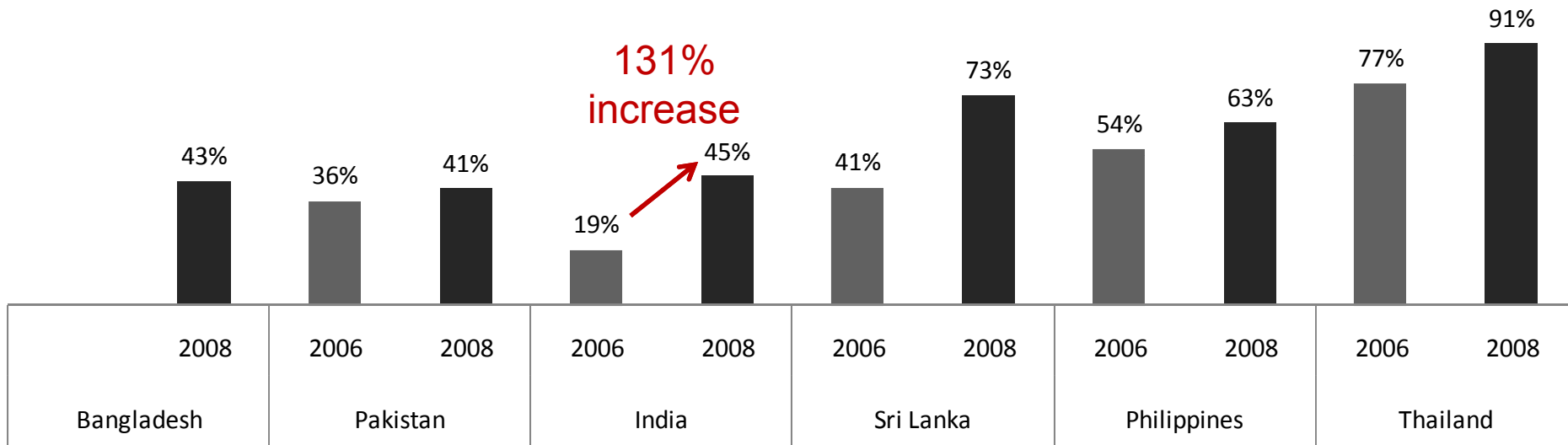
Most frequently used phone (% of BOP teleusers)



Access within the household

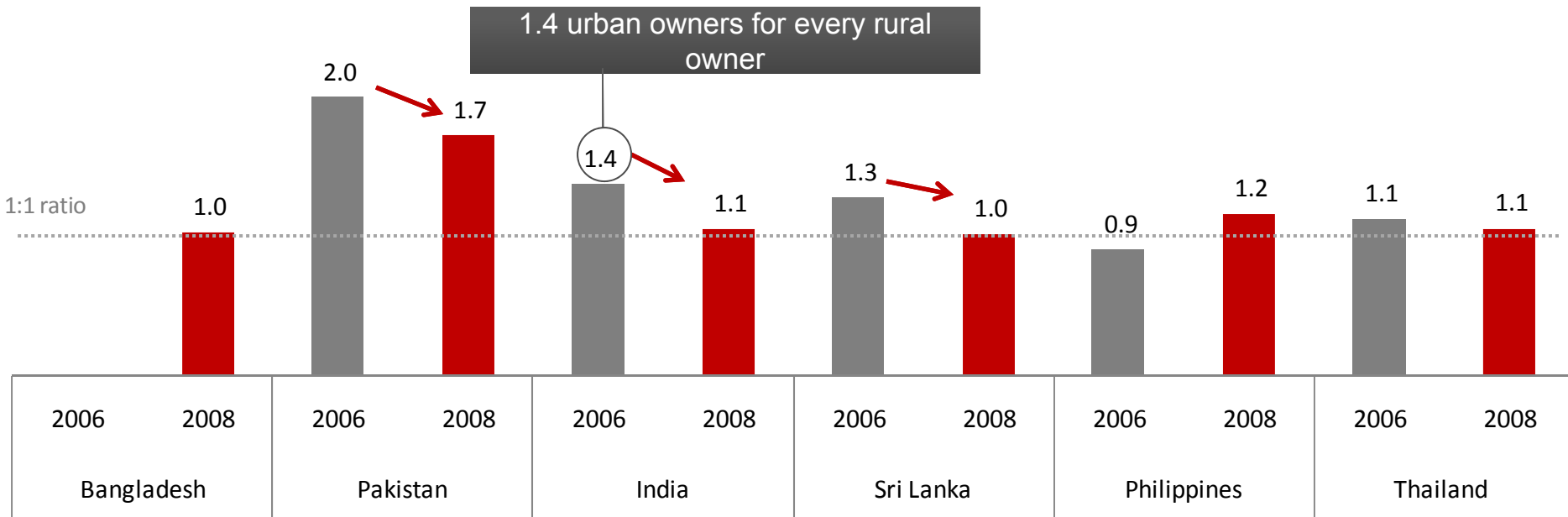
Largest % growth in Indian total BOP phone ownership

Total BOP phone ownership: 2006 vs 2008 (% of BOP teleusers)



Urban-rural divide in total BOP phone ownership **declining**

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



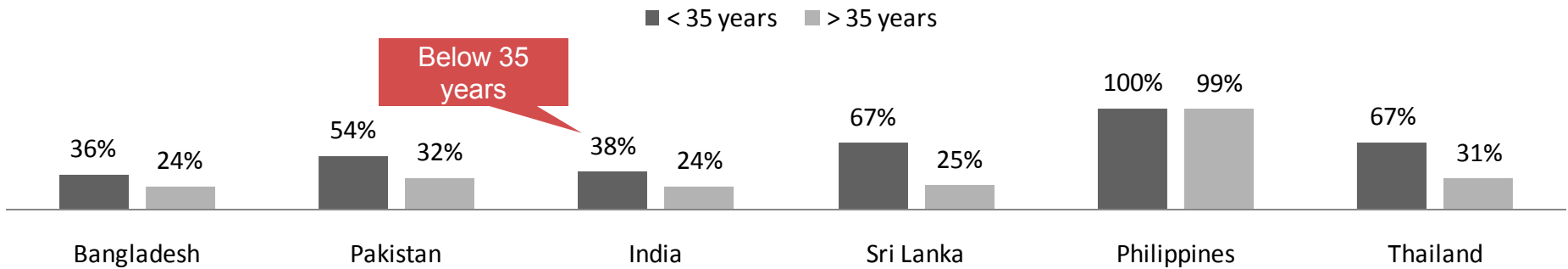
What do they do? Mostly calls, SMS, missed calls, balance checking

Among BOP mobile owners

	B'desh	Pakista n	India	S' Lanka	Ph'pines	T'land
	% of BOP mobile owners					
Taking phone calls	100%	100%	99%	100%	89%	100%
Receiving phone calls	100%	100%	98%	100%	99%	100%
Sending/receiving 'missed calls'	94%	84%	84%	73%	86%	39%
Sending/receiving SMS (text messages)	32%	47%	33%	52%	100%	53%
Sending/receiving MMS (picture messages)	1%	4%	4%	6%	13%	4%
Sending/receiving emails	0%	0%	1%	0%	0%	1%
Browsing the Internet	0%	1%	1%	2%	0%	2%
Taking photos /video clips	4%	2%	1%	8%	4%	18%
To play games (individual)	13%	18%	7%	21%	14%	17%
To play games (interactive)	1%	1%	1%	1%	3%	1%
To listen to the radio	0%	7%	3%	12%	5%	22%
To listen to music (files which you have downloaded or been sent by others, not radio)	4%	5%	3%	7%	3%	22%
To share content that you have created (E.g. ringtones, wallpapers, pictures, games and video clips)	1%	2%	2%	6%	5%	3%
To send or receive or download or upload other content (E.g., ringtones, wallpapers, pictures, games and video clips)	0%	2%	3%	8%	10%	9%
As an organizer (keep appointments, reminders, alarm and clock)	1%	7%	8%	4%	9%	14%

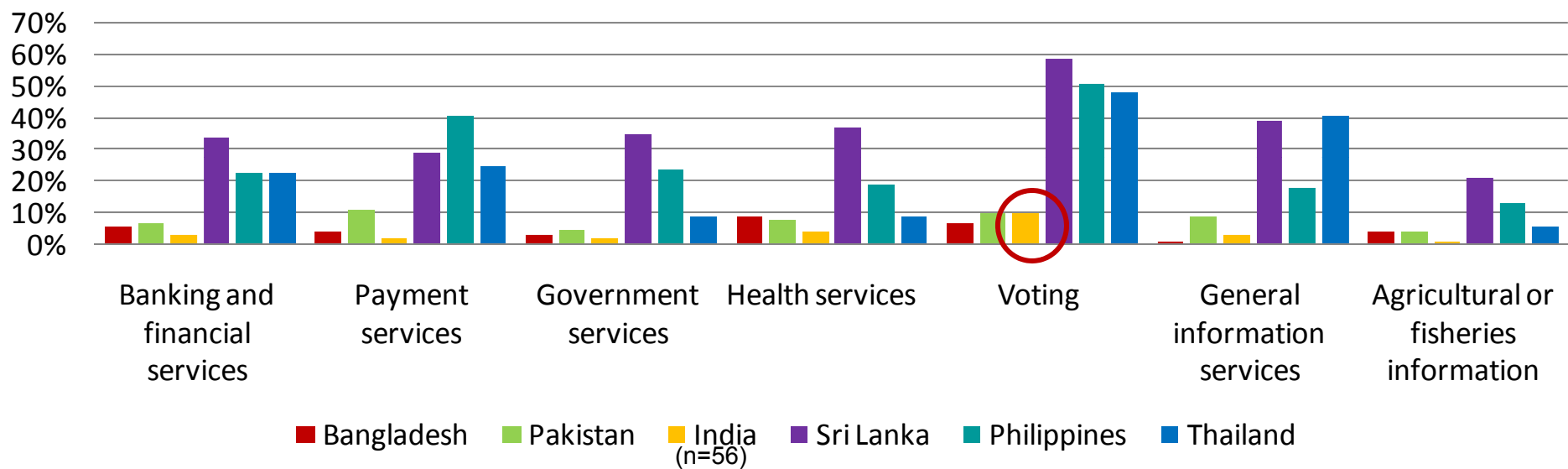
SMS popular among youth

SMS use on mobile (% of BOP mobile owners)



Poor awareness of more-than-voice services in India

Awareness of services at the BOP (% of BOP teleusers)



- 10% are aware of voting applications in India (competitions, real time polling, live participation in TV/radio programs, etc)

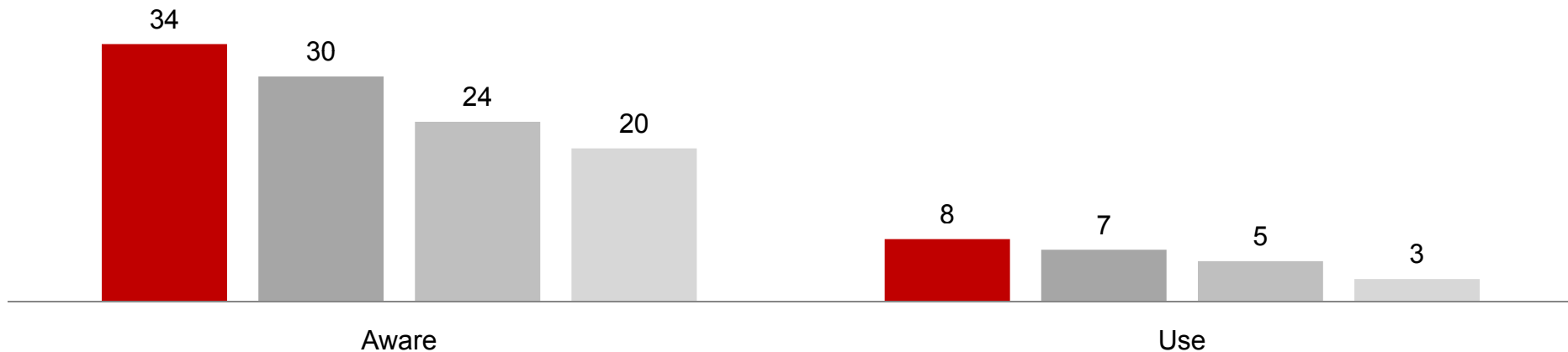
Usage is *even* poorer

	India (% of BOP teleusers who are aware of such services)	
	Use regularly	Use, but not regularly
Banking and financial services		1%
Payment services		
Government services		
Health services		1%
Voting	1%	1%
General information services		
Agricultural or fisheries information		

With the most potential: younger cohorts more familiar with “more-than-voice”

Awareness and use of Mobile2.0 services (% of BOP teleusers, all countries)

■ Age group 15-24 ■ Age group 25-34 ■ Age group 35-49 ■ Age group 50-60



What do we know about media and content?

What is known for certain?

- MSM are in trouble all over the world, except in India
 - Can we assume India is immune to the forces battering MSM in the medium to long term?
- User-generated content is becoming more important everywhere, including in our region
 - More and more MSM websites are including blogs
 - Cases of blogs breaking stories, or pursuing stories that MSM have dropped, exist
 - User-generated content is changing TV

What should we try to achieve and how?

Master's level education in media & new communication

- User-producers are going to be increasingly important, but they are not going to get Master's degrees
 - So they should be educated through the media themselves
 - We can do “train-the-trainer”
 - It is vitally important that the education we provide takes into account the most current and comprehensive information about user-producers
- In the short-term most of the people who will benefit from Master's level education will be
 - Teaching at various levels
 - Conventional media professionals
 - A few involved in management, policy and regulation

Are Master's Programs at IGNOU likely to be sufficient to meet the demand?

- No, but they can play a catalytic role
 - Provide a model for the hundreds of Masters-level programs that the country needs
 - Add a capacity-building component, ideally in collaboration with leading institutions such as Jamia Millia, to identify scholars/teachers with potential in regional and startup institutions and provide opportunities for them to upgrade their abilities