

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

[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

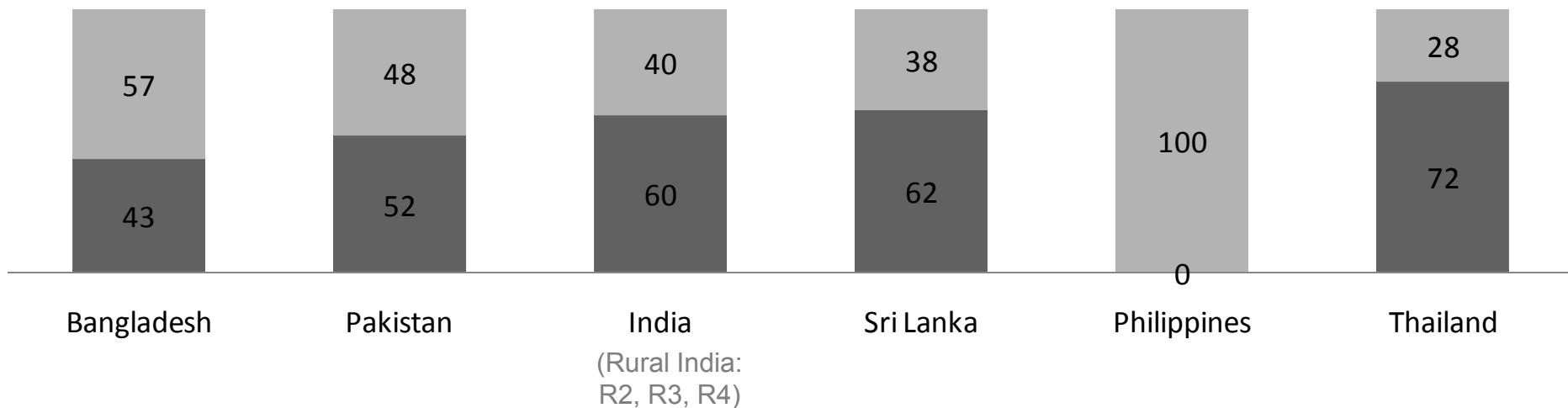
- Fieldwork between September and November 2008
  - Pakistan & Bangladesh fieldwork commenced after end of Ramadan (1st week October)

# 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



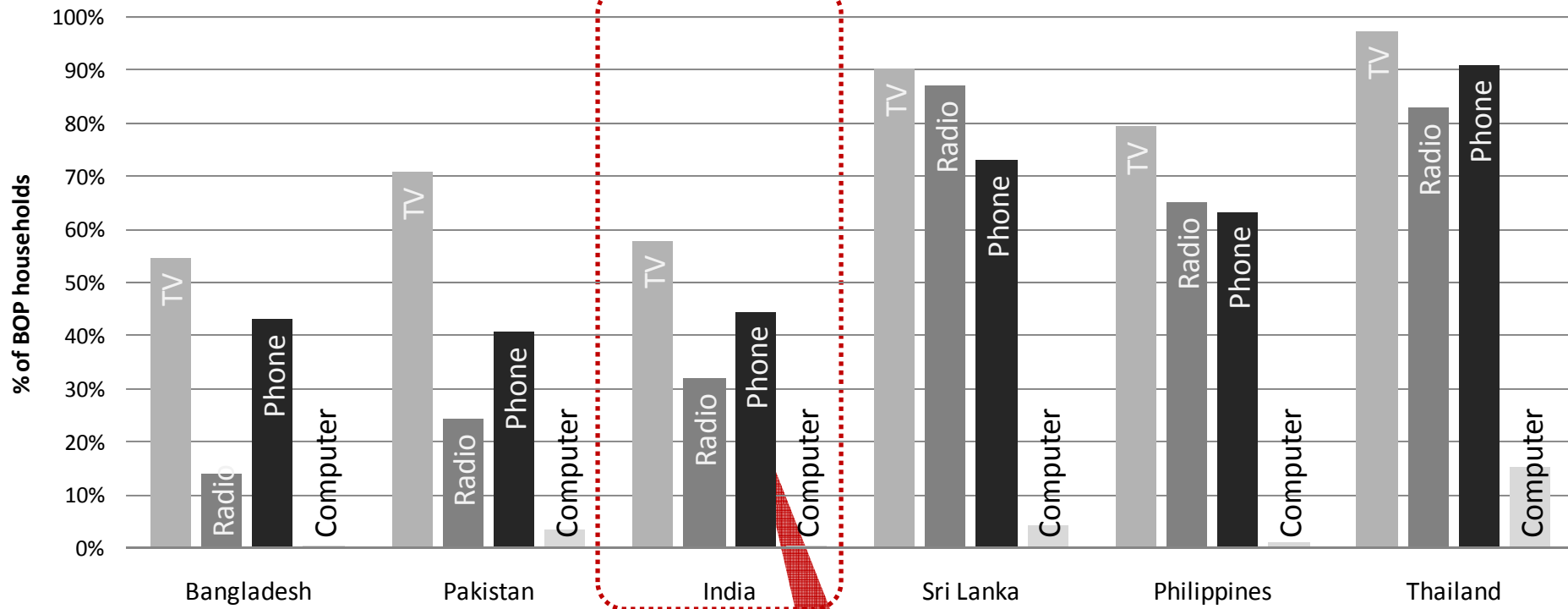
# Link between SEC D+E and "\$2 per day" definition

## 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

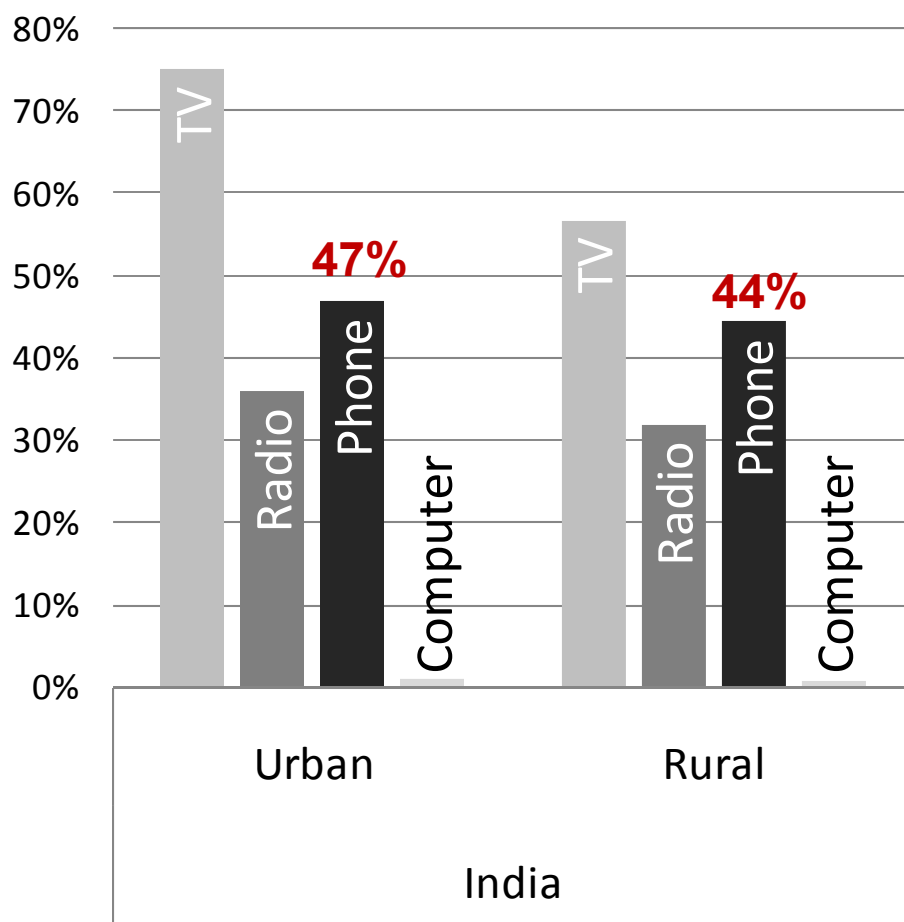
# Phones have overtaken radios in BOP households in the Indo-Gangetic Plain

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



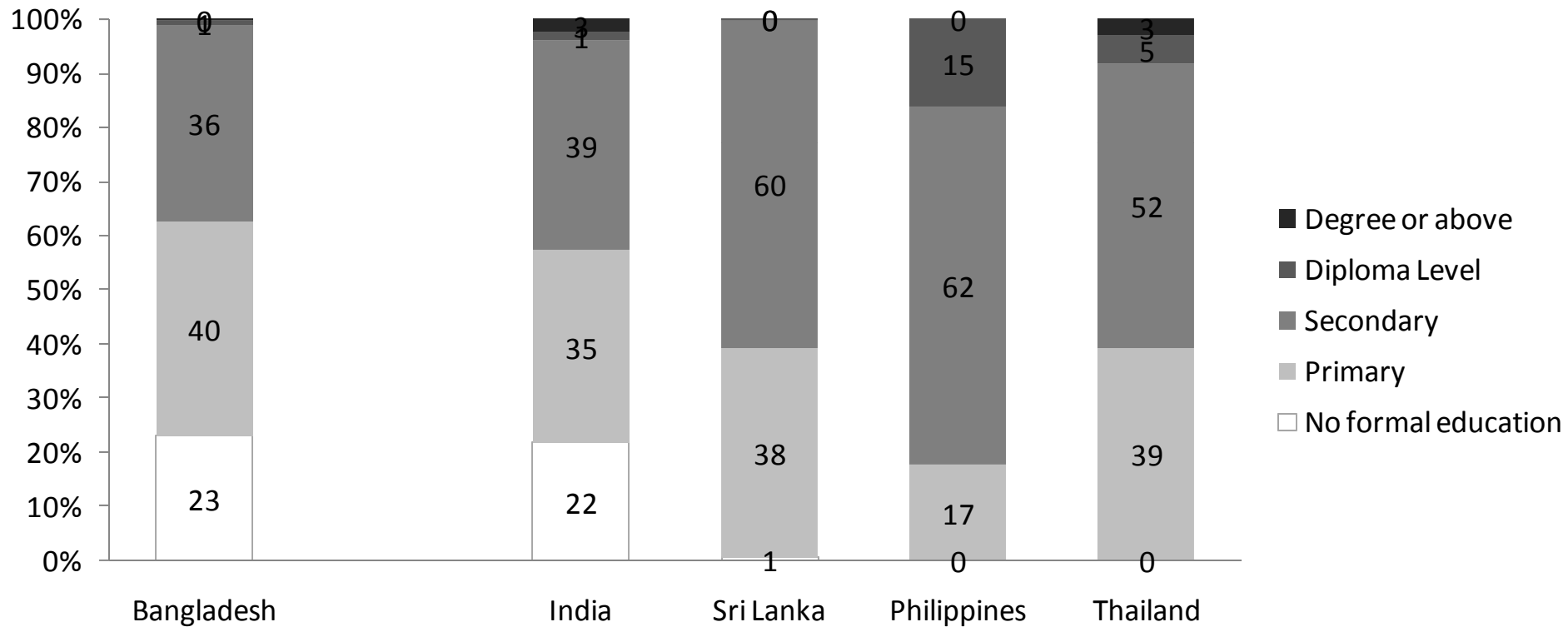
Mobile  
or  
fixed  
phone

### 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

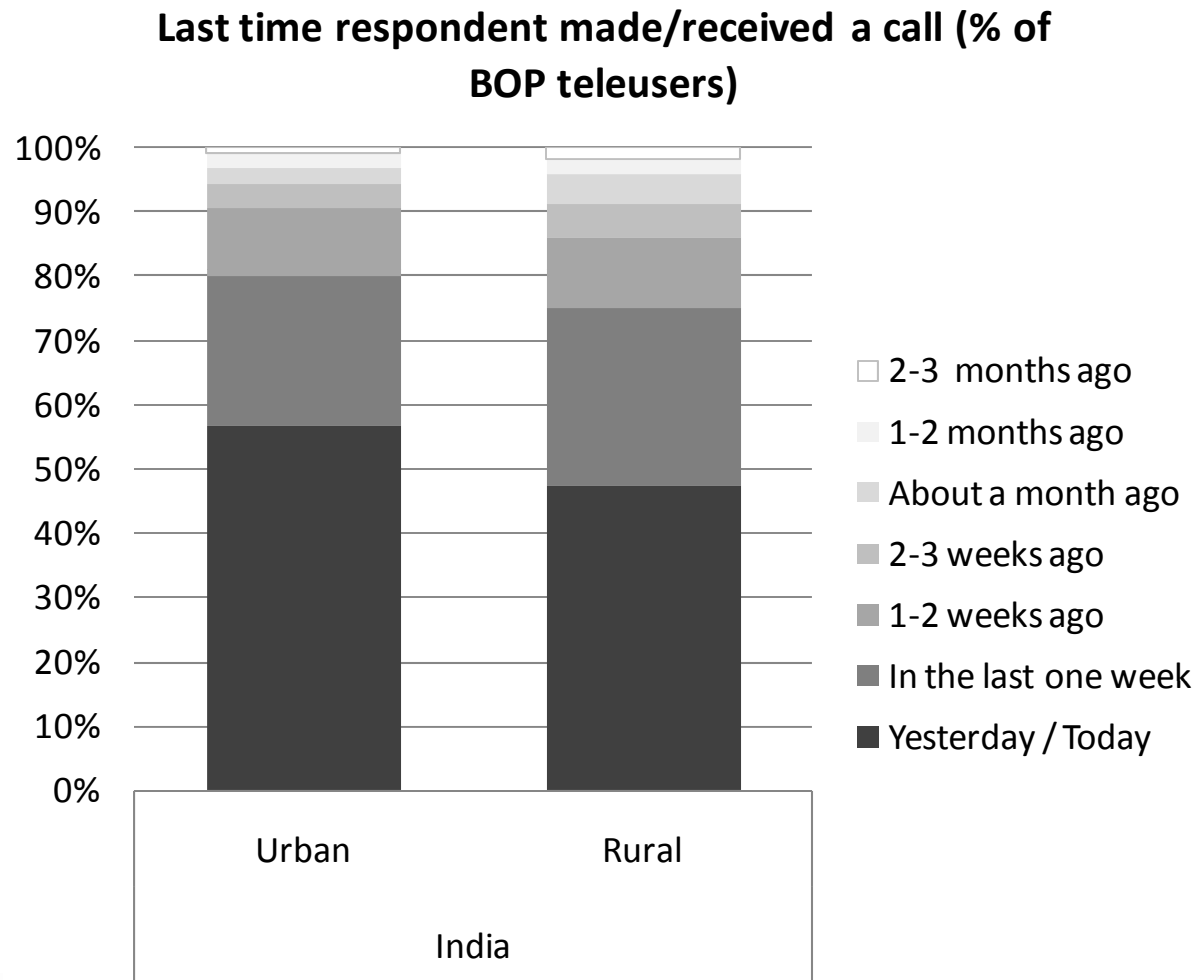
## Used a phone in the last 3 months

	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%

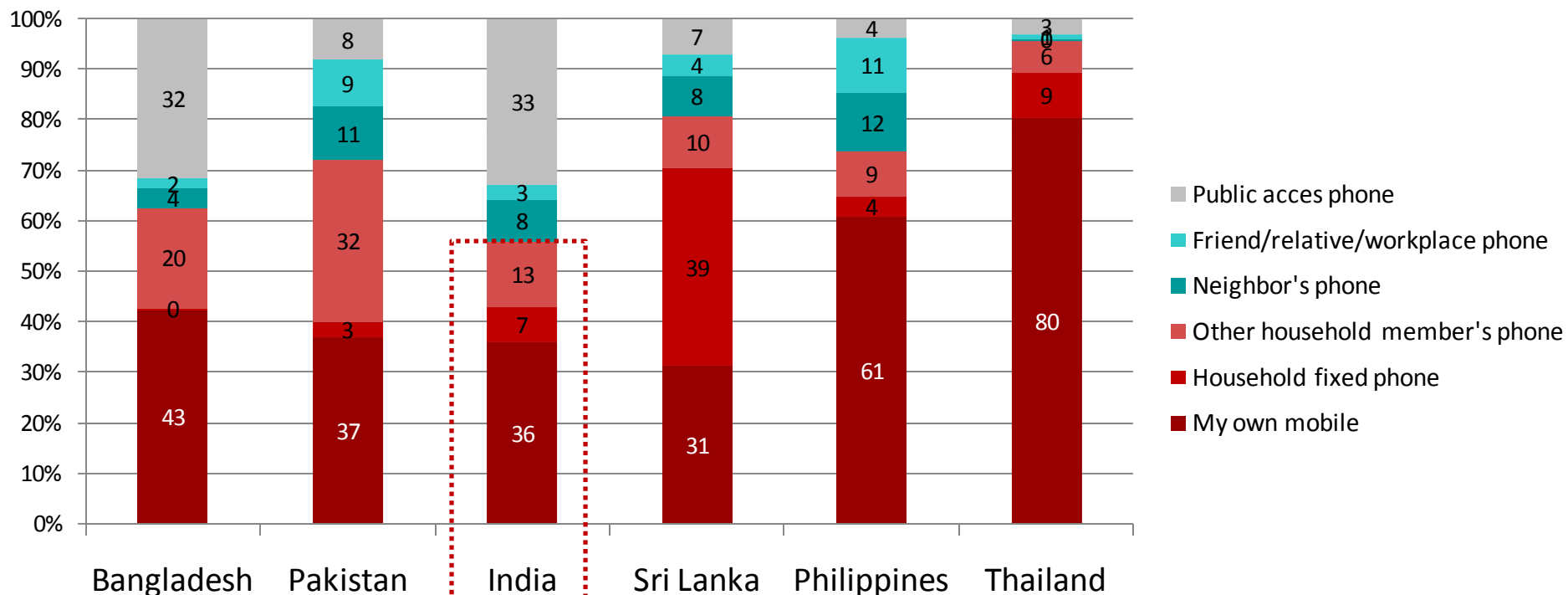
# More than **two thirds of rural BOP teleusers** used a phone in the last week





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

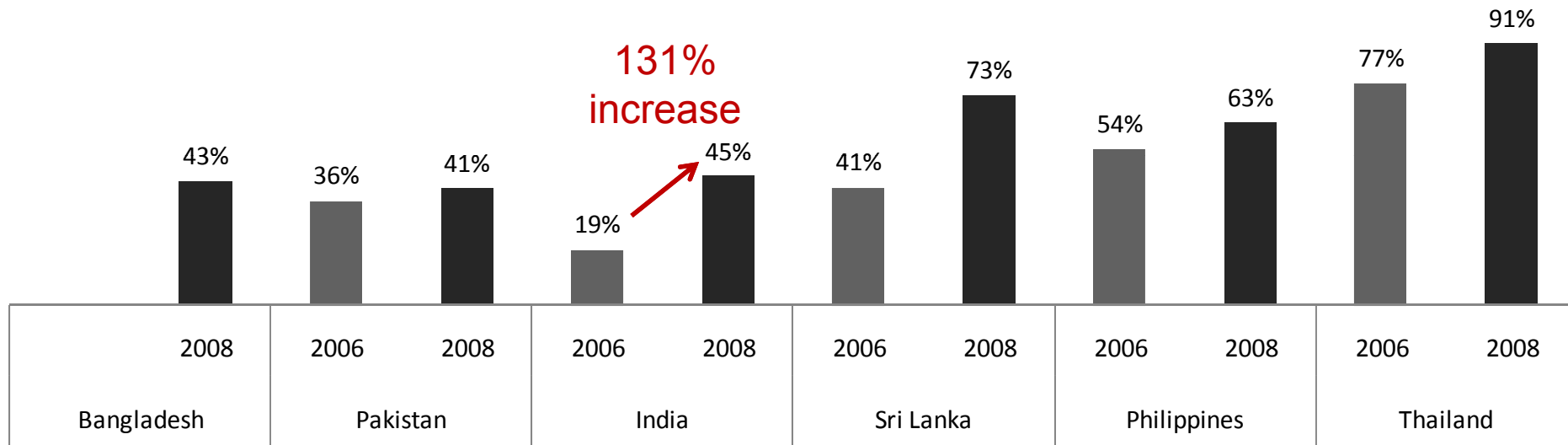
Most frequently used phone (% of BOP teleusers)



Access within the household

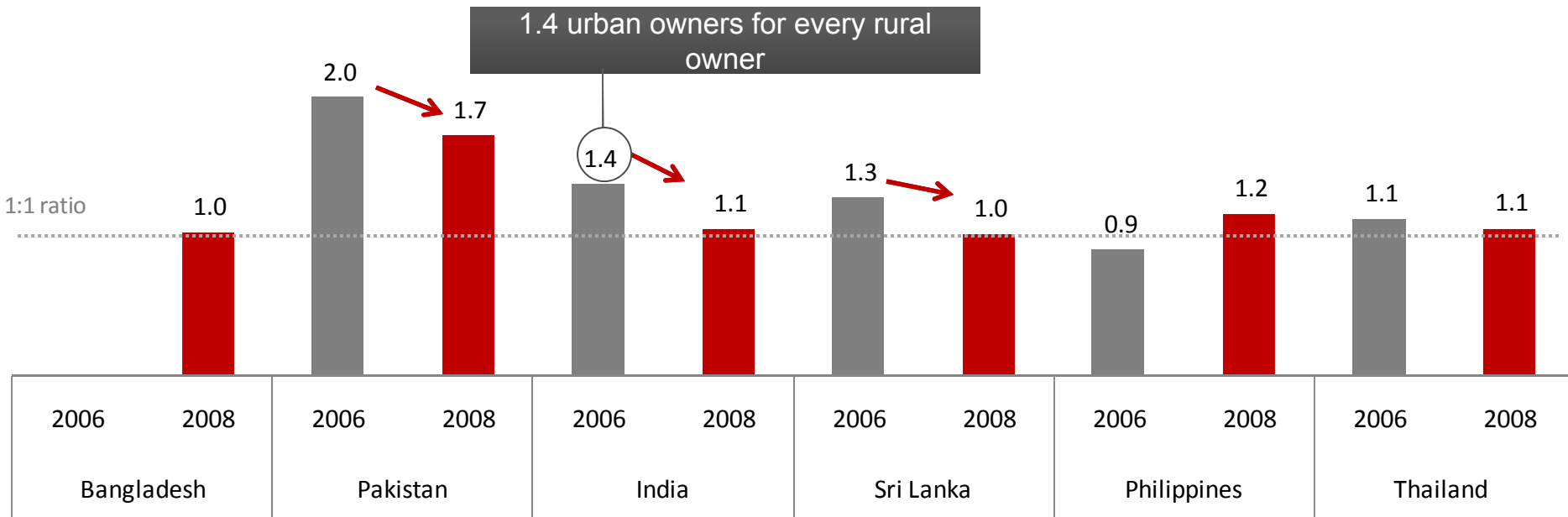
# Largest % growth in Indian total BOP phone ownership

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)



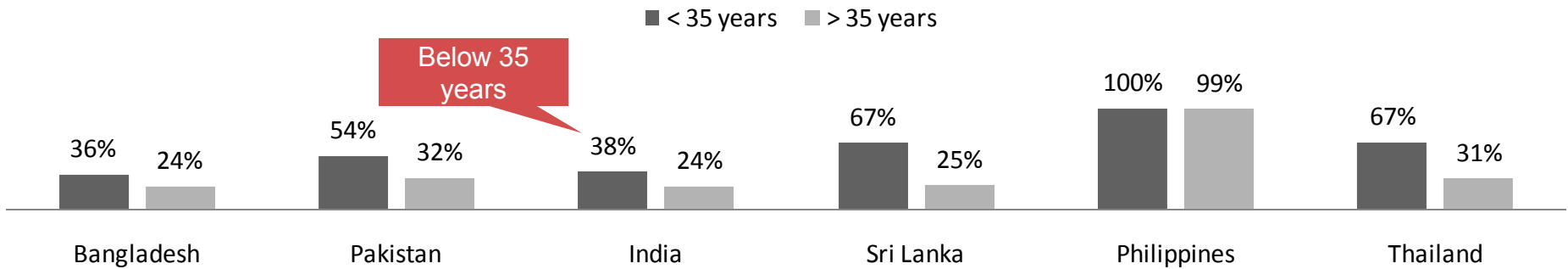
# What do they do? Mostly calls, SMS, missed calls, balance checking

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%

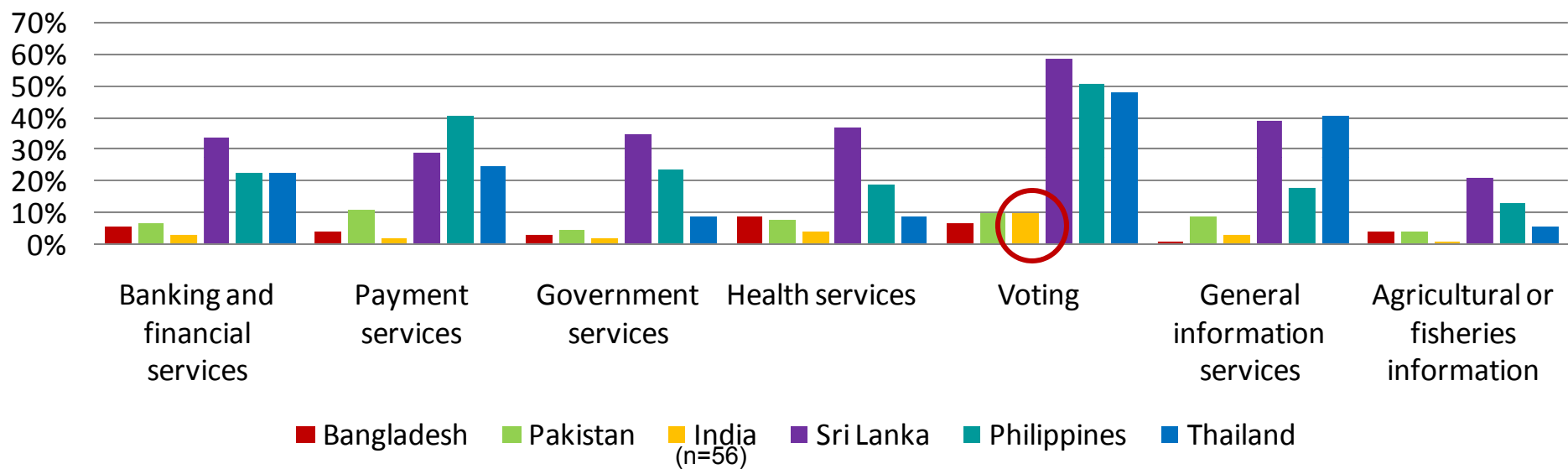
# SMS popular among youth

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)

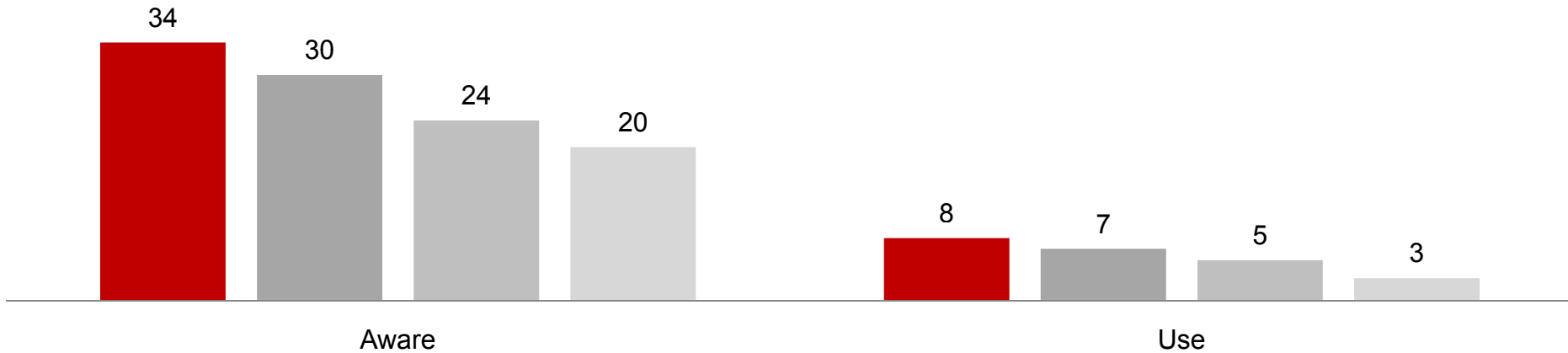
# Usage is *even* poorer

	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