

Teleuse@BOP4: Preliminary findings

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Understanding emerging Asian BOP's use of ICTs (mostly phones) via **Teleuse@BOP** studies

- Multi-country studies conducted in 2005, 2006, 2008, 2011
 - Bangladesh, Pakistan , India, Sri Lanka, Indonesia (Java), Philippines, Thailand
 - Quantitative (representative survey) and qualitative research conducted
- Target group: BOP teleusers aged 15-60
 - BOP defined as Socio-Economic Classification (SEC) groups D and E
 - Teleusers defined as having used any phone in previous three months
- Different methodology and target group (USD1.25/day group) in Java

SEC D+E vs. USD2/day comparison

Actual population proportions

	Bangladesh	Pakistan	India	Sri Lanka	Thailand
SEC D+E (% of population)	73	59	69	44	33
Less than USD2 per day (% of population)	84	80	74	43	25
Year	2000	2004	2002	2003	2002
Source: World Resources Institute					

2011 focus on productive use of ICTs

- Representative sample of BOP *teleusers* (6 countries)
 - Questions on how ICTs used for productive uses; perceptions of economic benefits, etc.
- Non-representative sample of agricultural micro-entrepreneurs: Growers (farmers) & non-growers (4 countries)
 - Questions on knowledge and information needs, sources, uses, etc, as well as ICT use.
 - Separate presentation follows

Sample sizes

	Bangladesh	Pakistan	India	Sri Lanka ^[1]	Java ^[2]	Thailand	Total
BOP teleusers	2,050	1,835	3,181	1,200	1,088	800	10,154
Margin of error @ 95% CL (%)	± 2.0%	± 2%	± 2%	± 3%	± 2%	± 4%	

[1] Sri Lanka: Includes North and East

[2] Java region only; separate sampling procedures and BOP definition used

Multi-staged stratified sampling by probability proportionate to size to ensure representation of target group

- Primary sampling units (Regions/states/provinces/districts) randomly selected in 2006; kept the same for comparison in 2008 and 2011.
- Within selected PSUs, urban and rural centers randomly selected
- Within selected urban and rural centers, starting points randomly selected
 - Number of starting points within each center determined in proportion to its population
 - 10 HH per starting point selected using right-hand rule
 - Kish grid used to select from eligible respondents within HH

Study locations

Bangladesh		Pakistan		India		Sri Lanka		Thailand	
Dhaka	697	Sindh	421	Uttar Pradesh	853	Western	169	Chiang Mai	85
Chittagong	111	Punjab	1062	Harayana	114	Central	162	Pisanulok	86
Sylhet	154	Baluchistan	96	Assam	146	Southern	131	Suratthani	36
Rajshahi	623	Khyber Paktoon Khuwa	254	Tirupura	18	North Western & North Central	203	Songklah	37
Khulna	303			West Bengal	440	Uva & Sabaragamuva	231	Nakornrachasi ma	218
Barisal	161			Bihar	448	Northern & Eastern	304	Khonkaen	215
				Rajasthan	294			Nakornsawan	63
				Gujarat	268			Chonburi	59
				Tamil Nadu	326				
				Karnataka	272				
	2050		1834		3181		1200		800

AGENDA

- SAMPLE PROFILE
- ACCESS
- MOBILE OWNERSHIP AND USE
- MORE-THAN-VOICE
- PERCEIVED BENEFITS
- QUALITY OF SERVICE
- SUMMARY

Findings

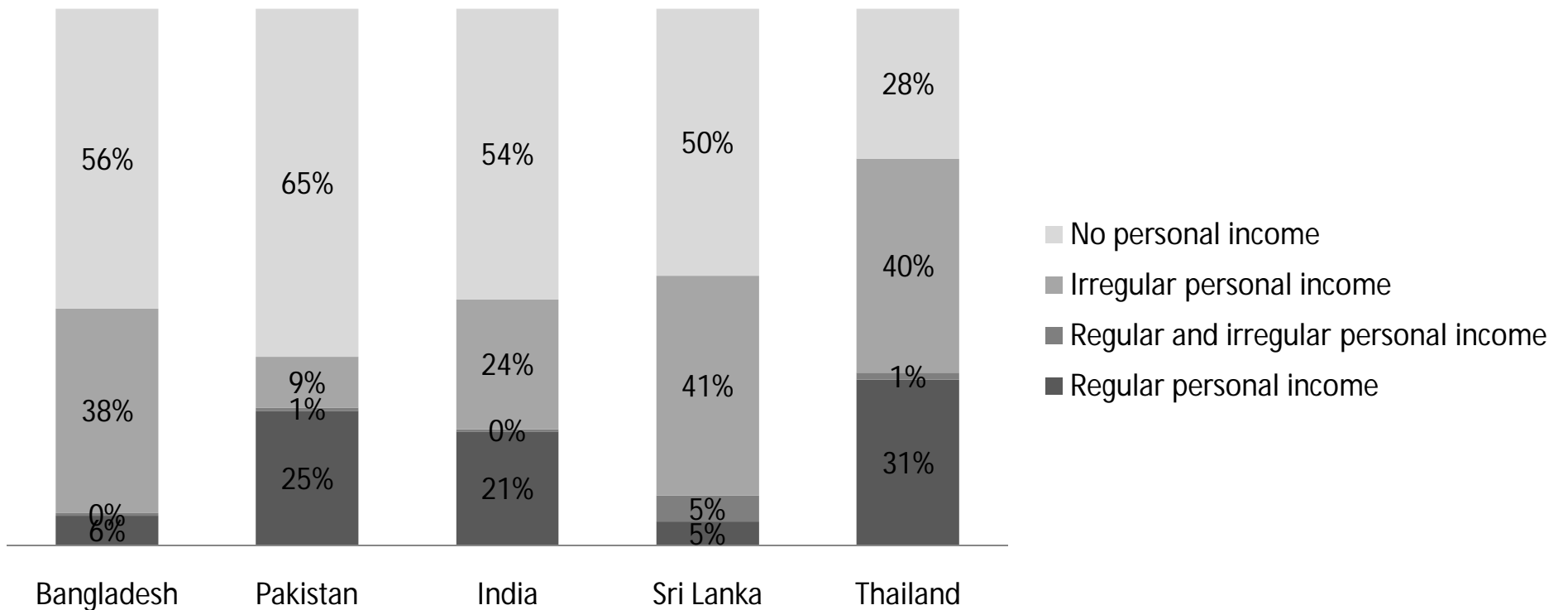
SAMPLE PROFILE

Sample profile

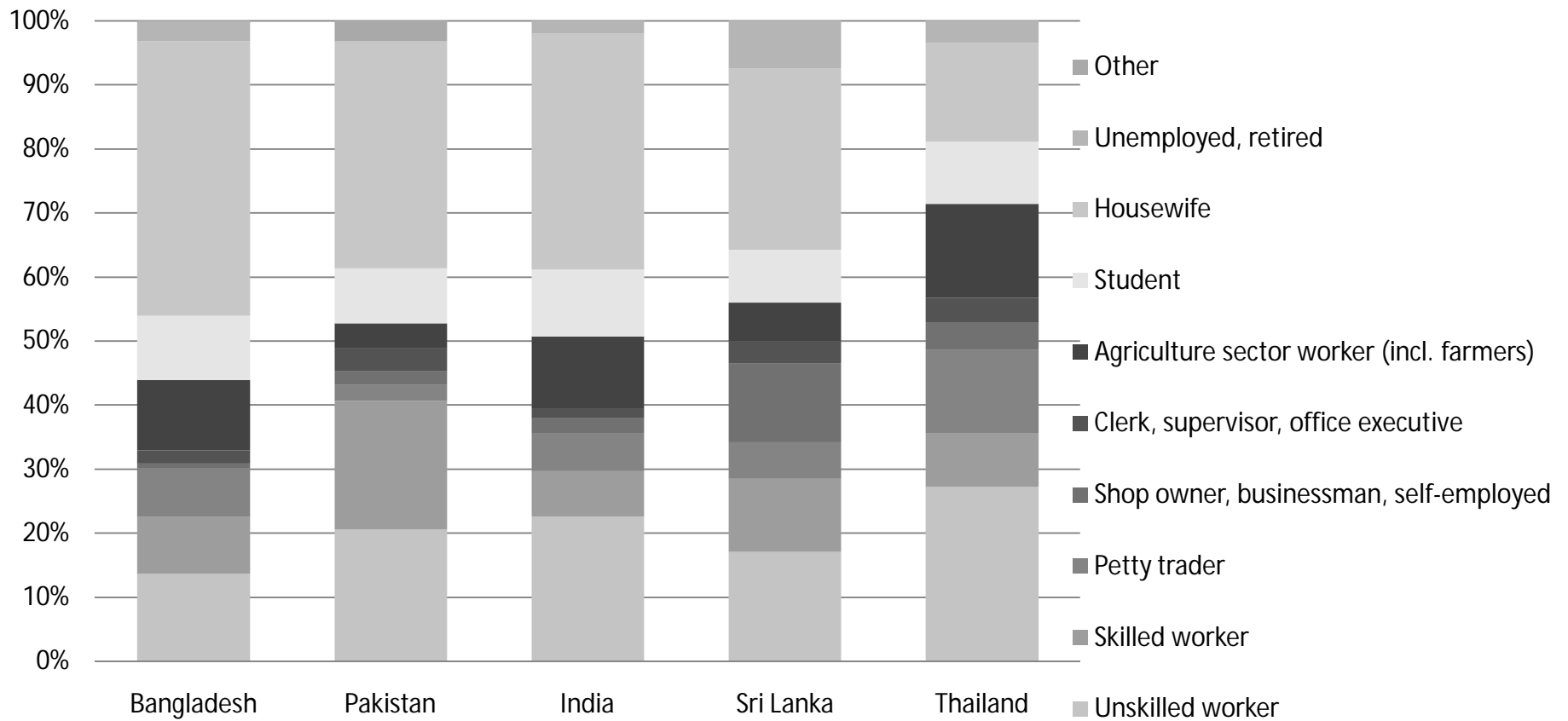
	Gender		Age		Location	
	Male (%)	Female (%)	Mean	SD	Urban (%)	Rural (%)
Bangladesh	49	51	33	12	26	74
Pakistan	42	58	31	10	38	62
India	45	56	32	12	19	81
Sri Lanka	40	60	35	12	15	85
Indonesia	49	51	36	13	43	57
Thailand	52	48	34	13	25	75

Majority either have no or irregular personal incomes

Personal income status (% of BOP teleusers)

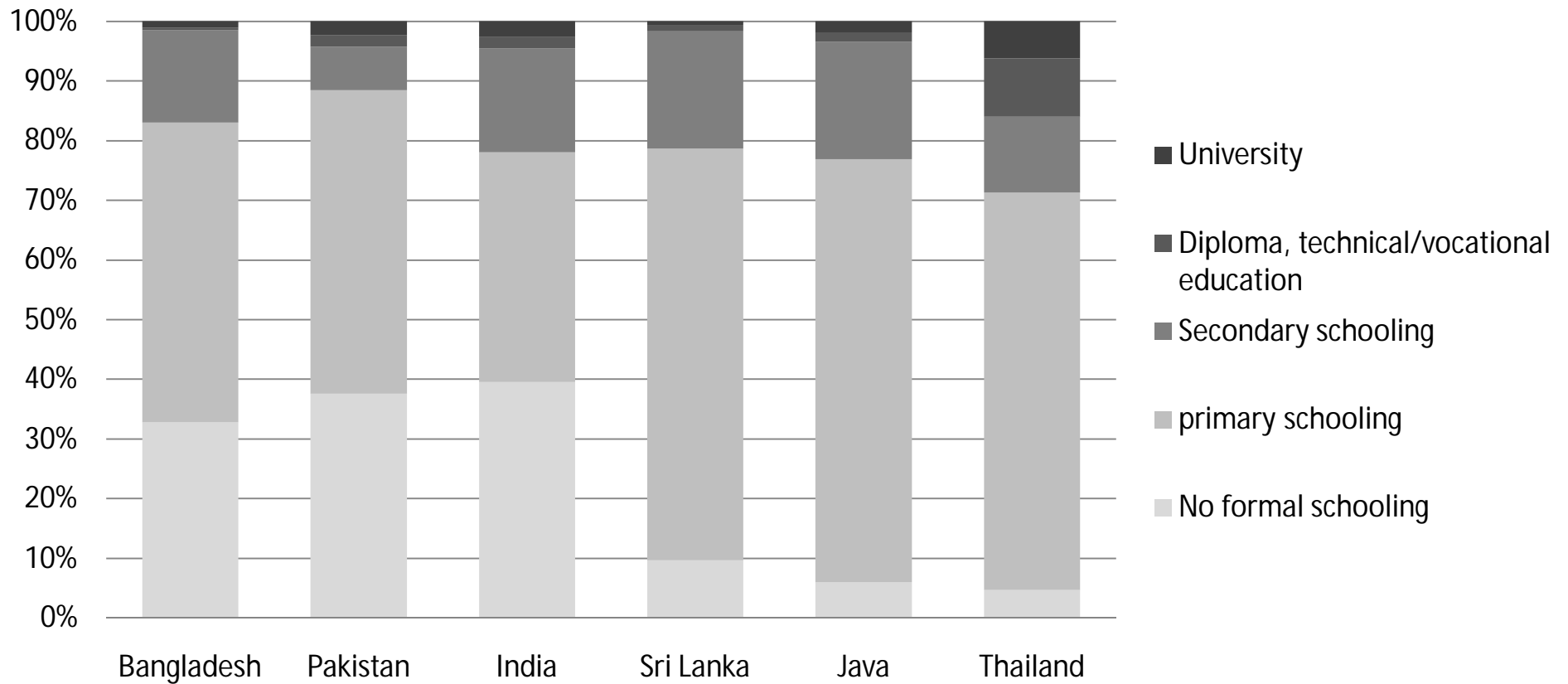


Primary occupation (% of BOP teleusers)



Most of BOP only have primary education

Highest educational achievement (% BOP teleusers)



Findings

ACCESS

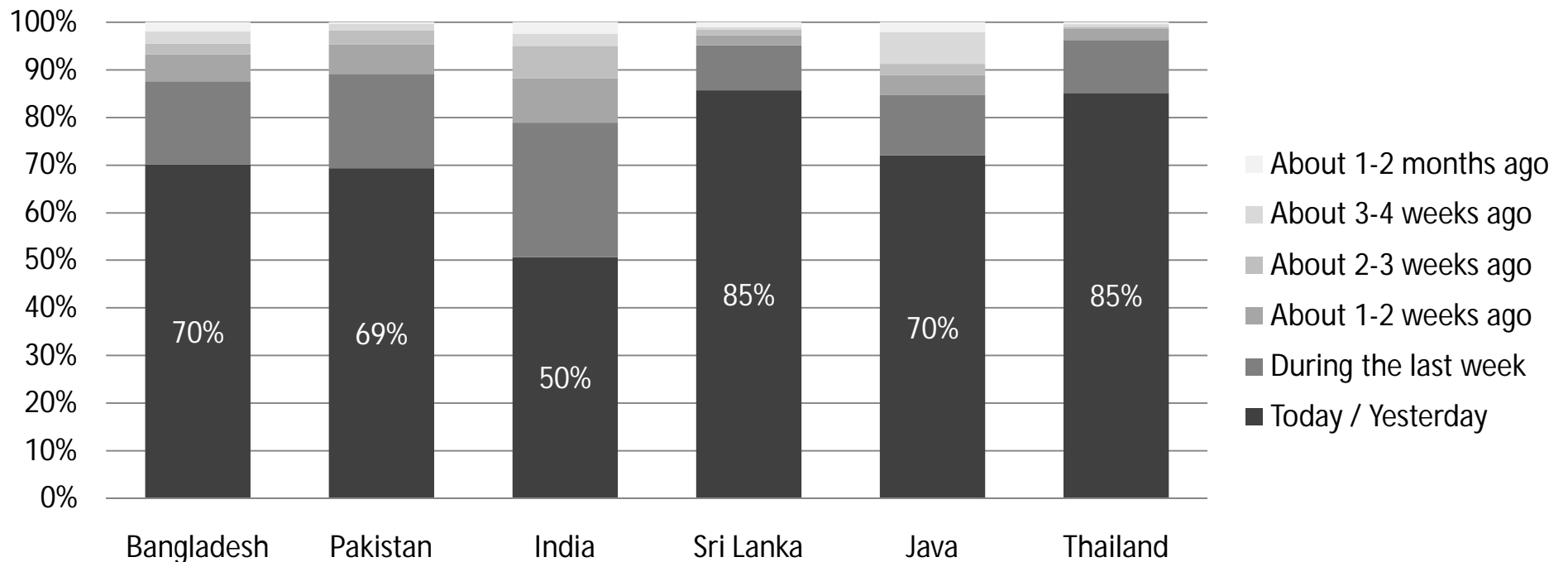
90% of BOP have used a phone in previous 3 months

Used a phone in the last 3 months (% of BOP)

	Bangladesh	Pakistan	India	Sri Lanka	Java	Thailand
2008	95%	96%	86%	88%	-	77 %
2011	99%	96%	89%	90%	90%	91%

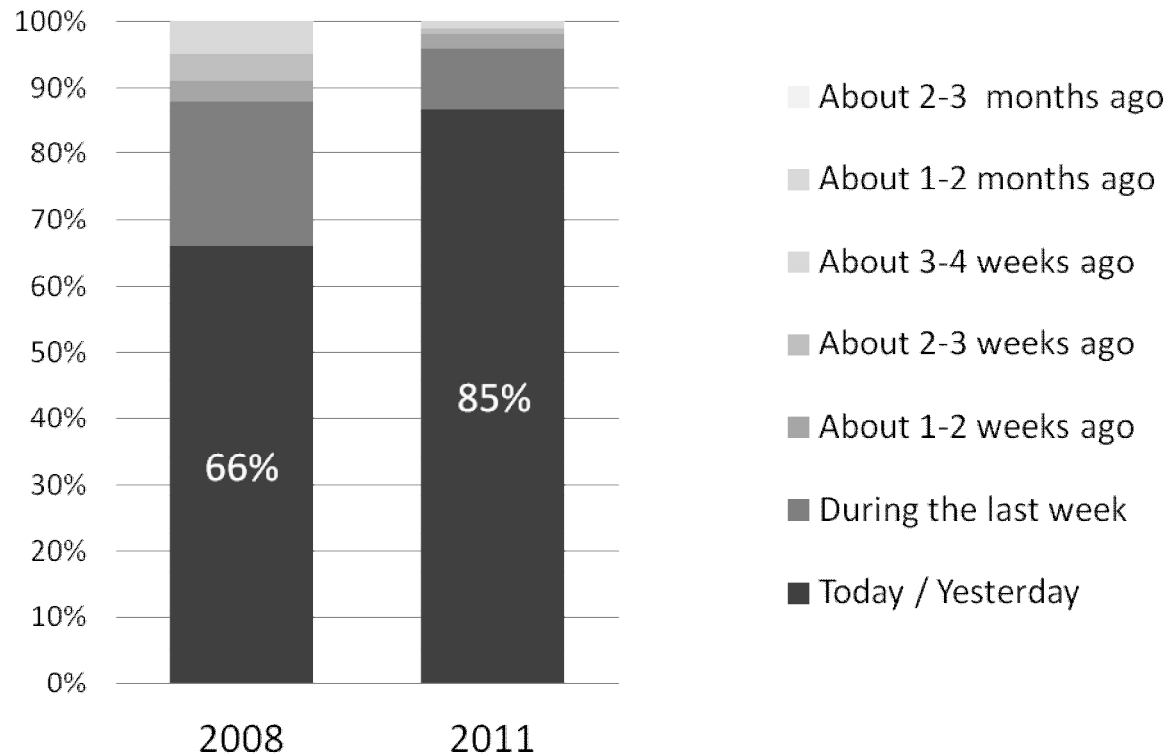
LK BOP are regular users; relatively more frequent users

Last time respondent used a phone (% of BOP teleusers)



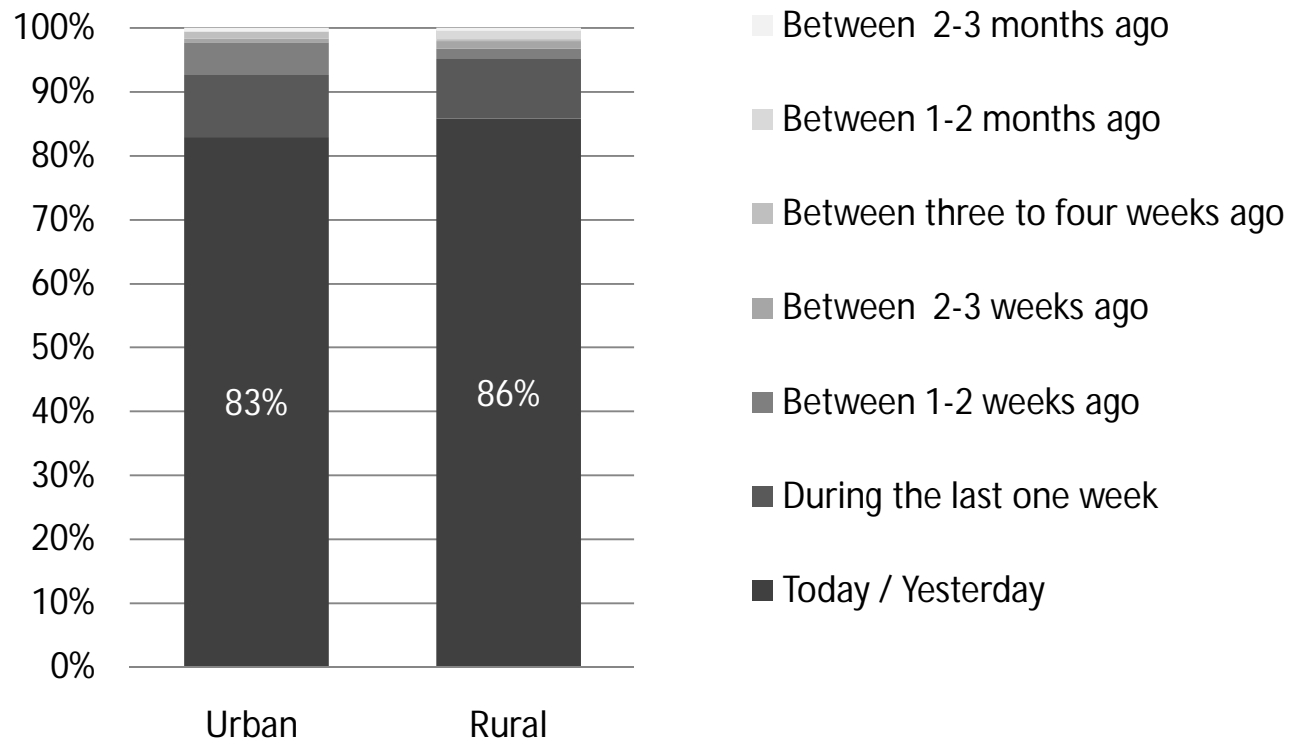
Sri Lanka 2008 vs 2011: 19% increase in BOP who made a call on the "day" of the survey

Last time respondent used a phone (% of BOP teleusers)



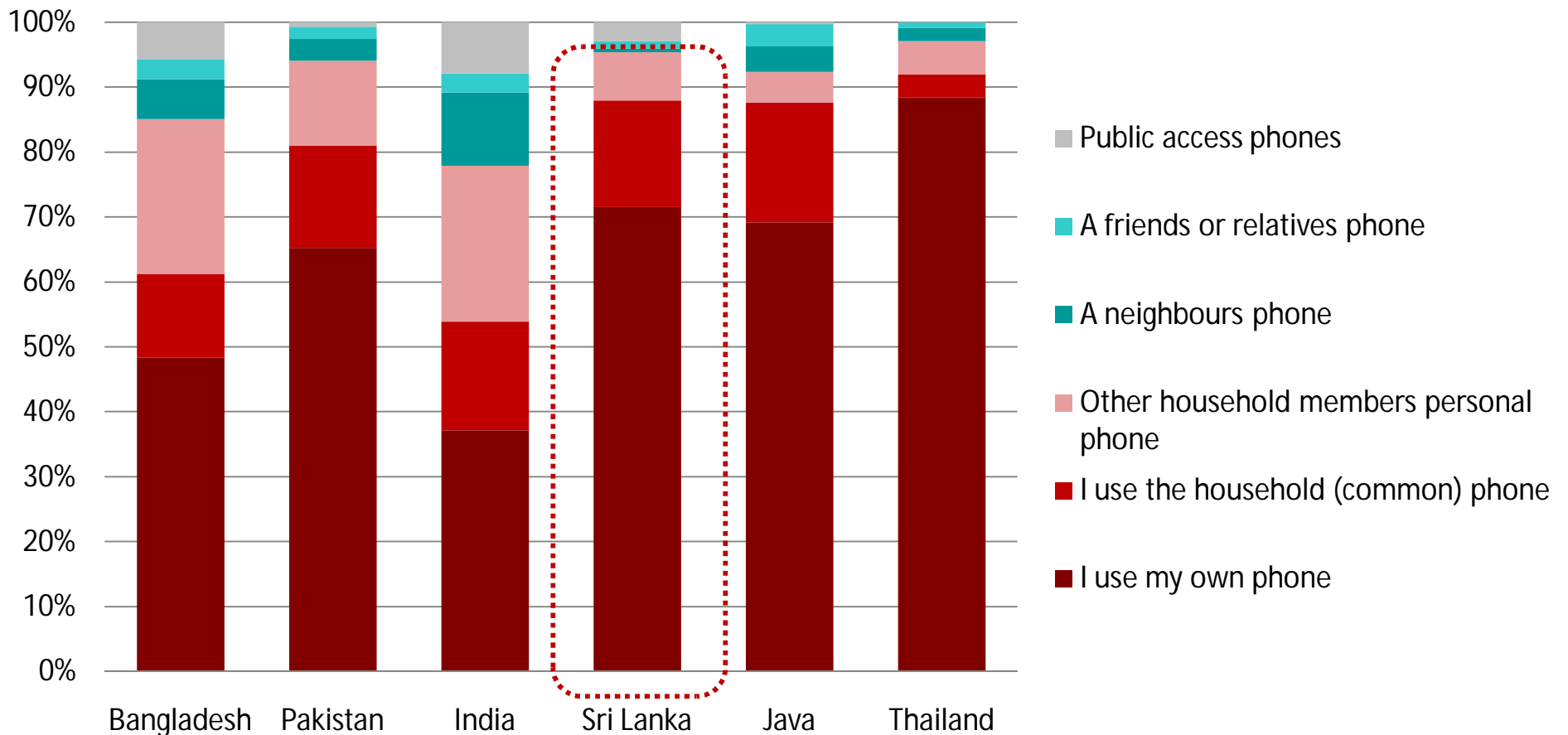
Rural BOP in Sri Lanka on par with urban BOP

Last time respondent used a phone (% of BOP teleusers)



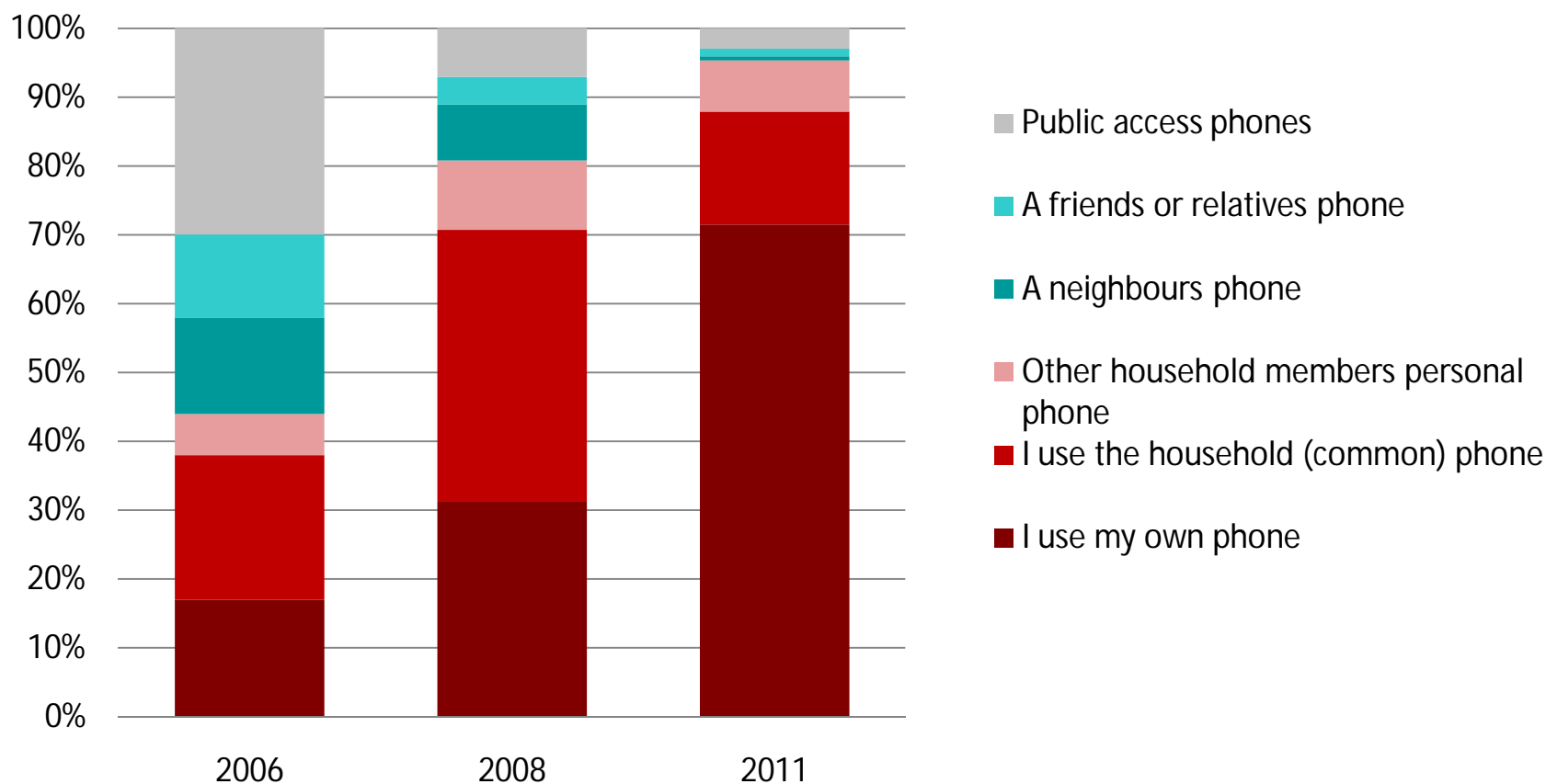
95% of BOP have access within the household

Most frequently used phone (% of BOP teleusers)



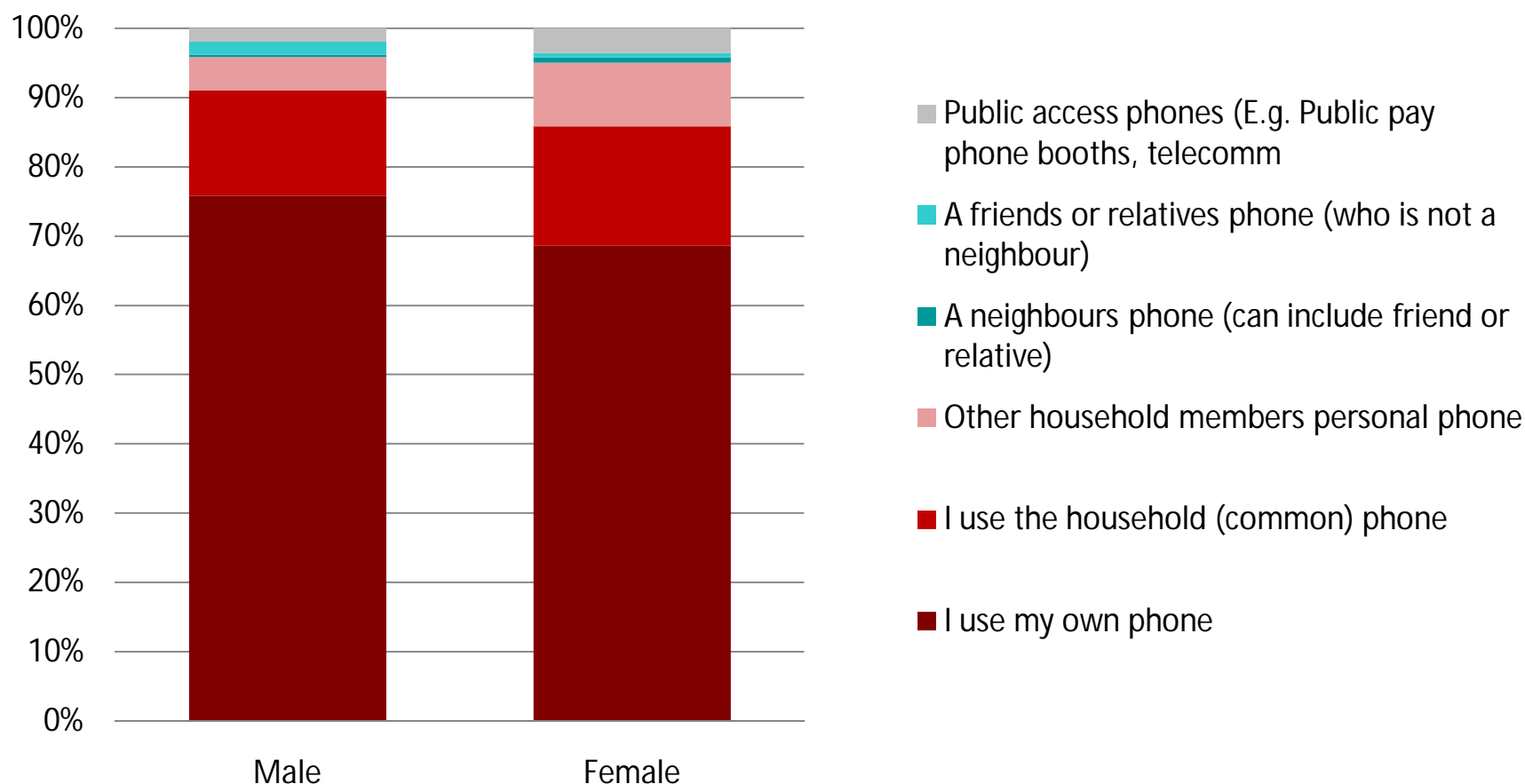
Sri Lanka 2006-2011: Fall in public phone and increase in household access

Most frequently used phone (% of BOP teleusers)

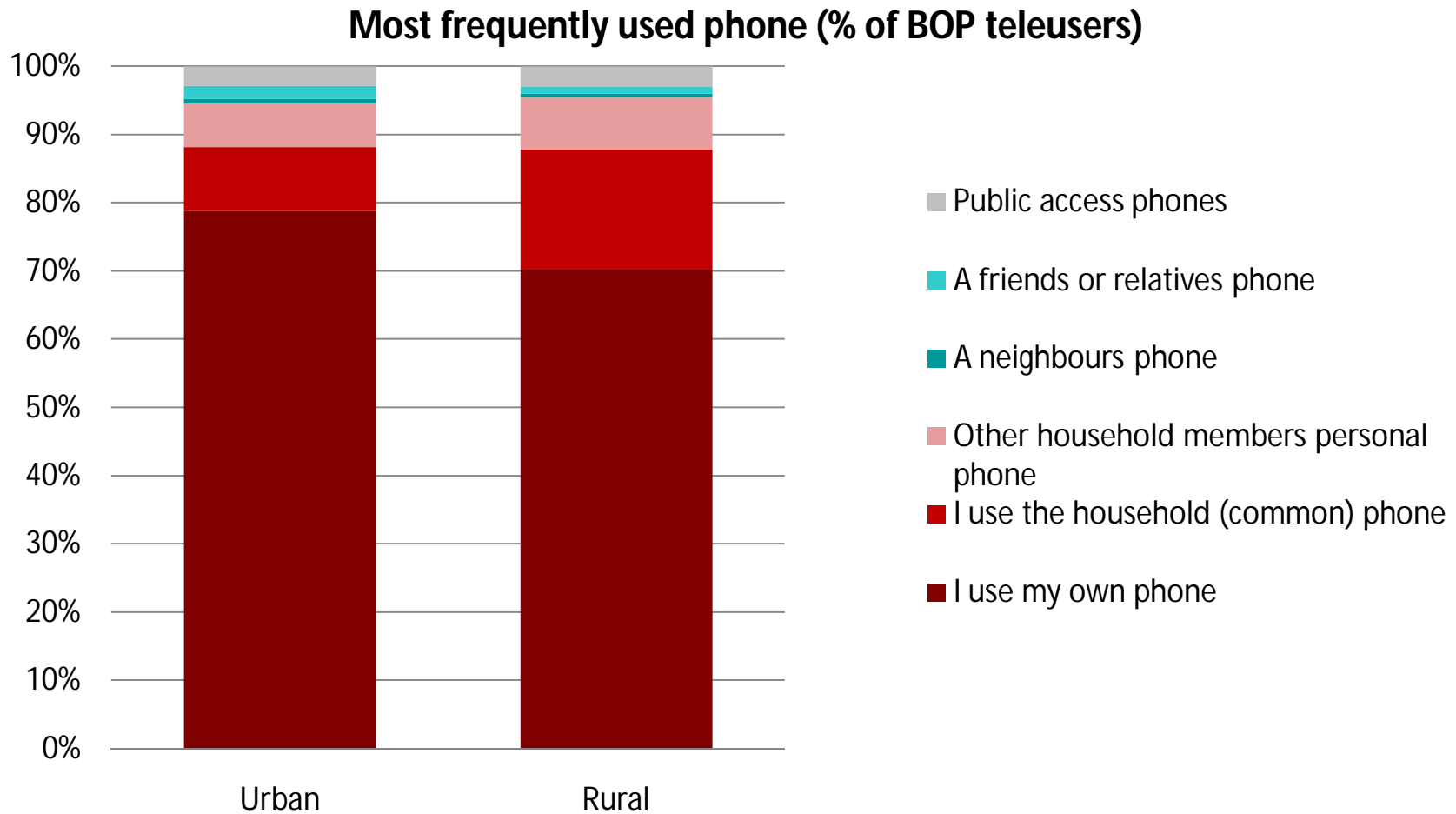


More females using household phones and others' phones within household

Most frequently used phone (% of BOP teleusers)



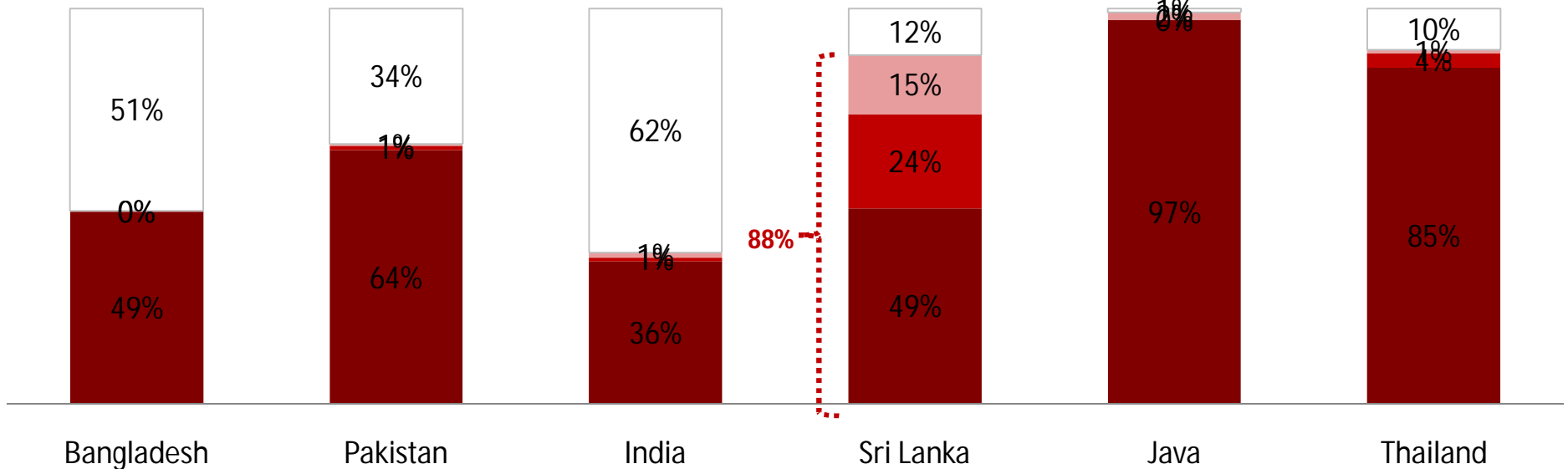
More reliance on other peoples' phones in rural areas



Fixed phones popular only in Sri Lanka

Household phone ownership (% of BOP teleusers' households)

■ Own mobile
 ■ Own mobile and fixed
 ■ Own fixed
 □ Own nothing



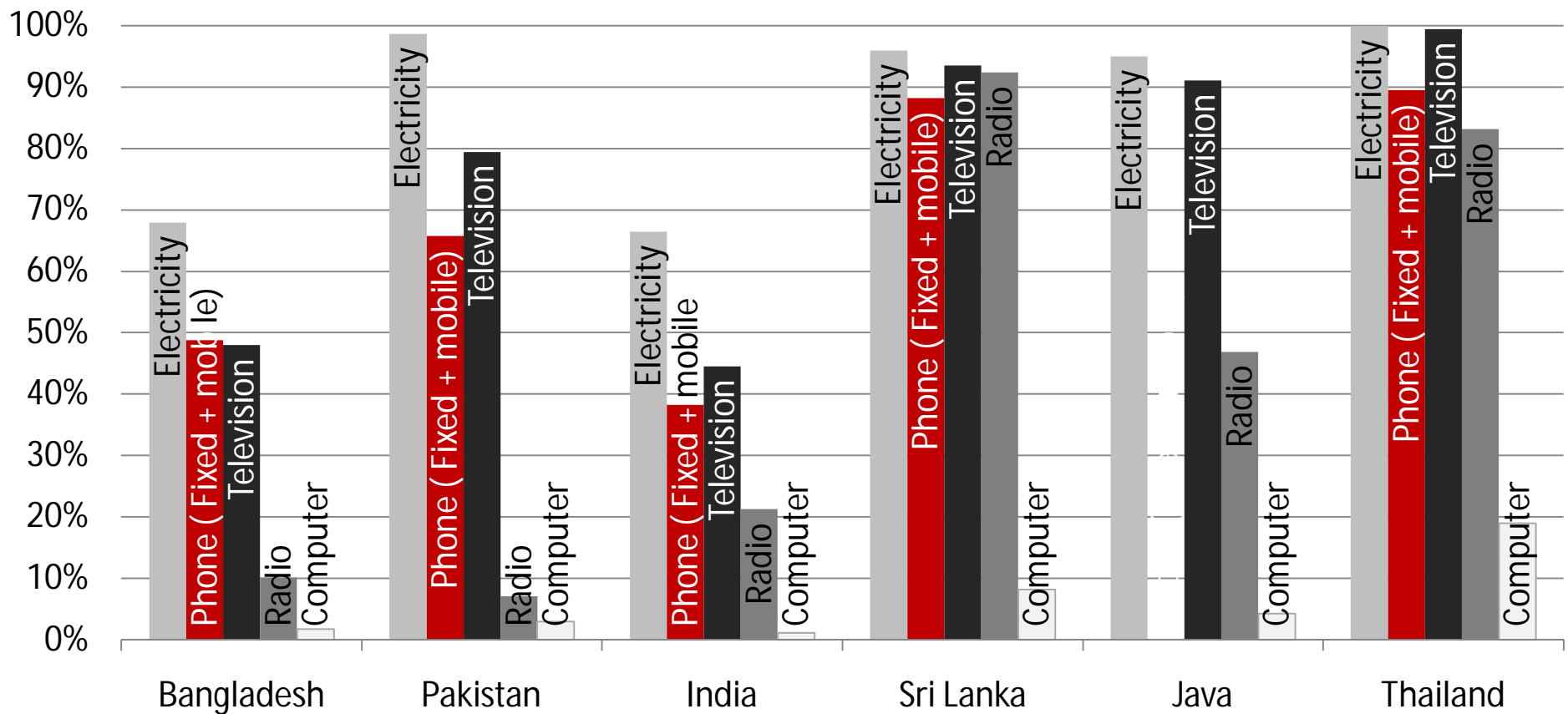
Household phone ownership in **Sri Lanka** (% BOP teleusers' households)

2008	76%
2011	88%

Among BOP teleusers' households

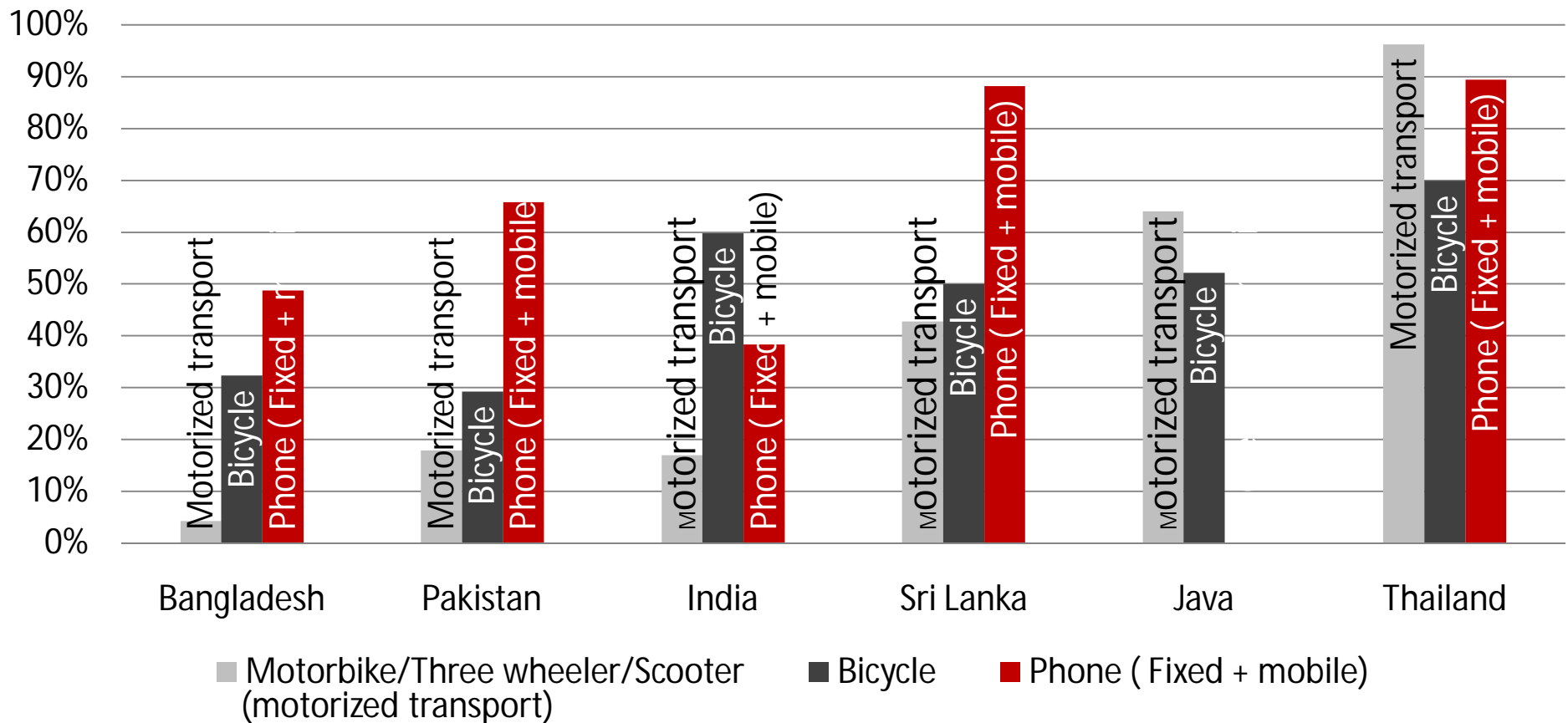
Household access to phone compared with electricity, TV, radio in Sri Lanka

Household access (%BOP outer sample)



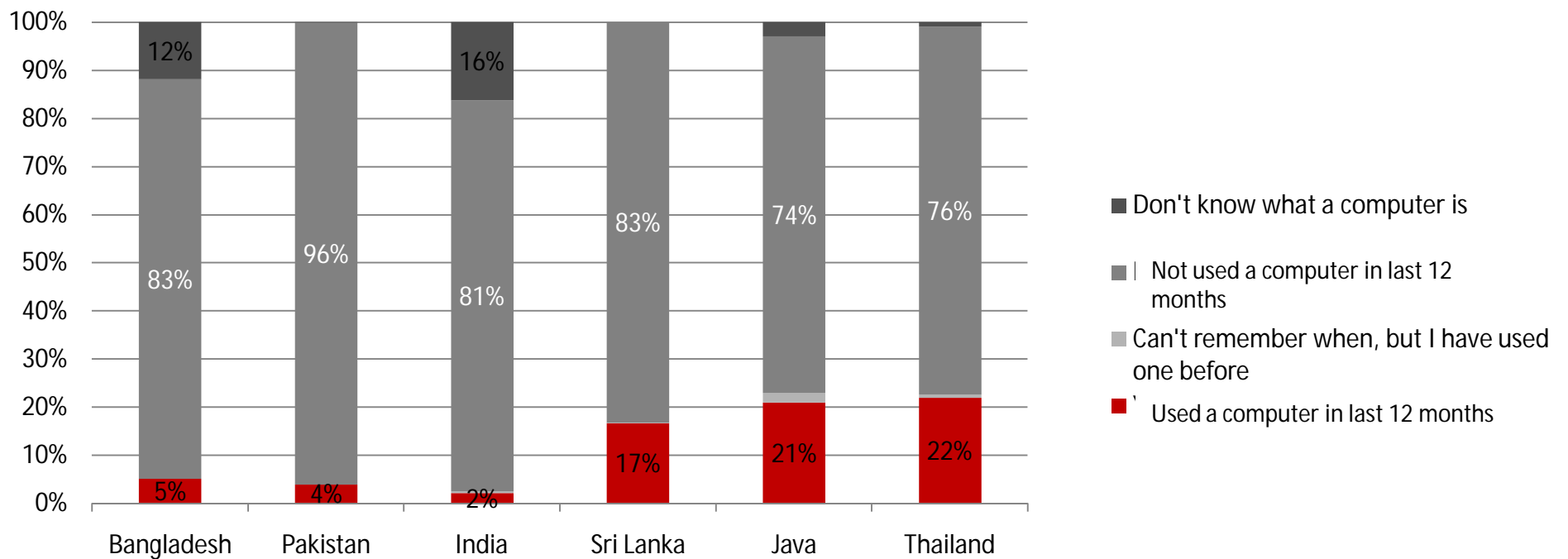
Access to household phones greater than to personal transport in LK

Household access to phones vs transport(%BOP outer sample)



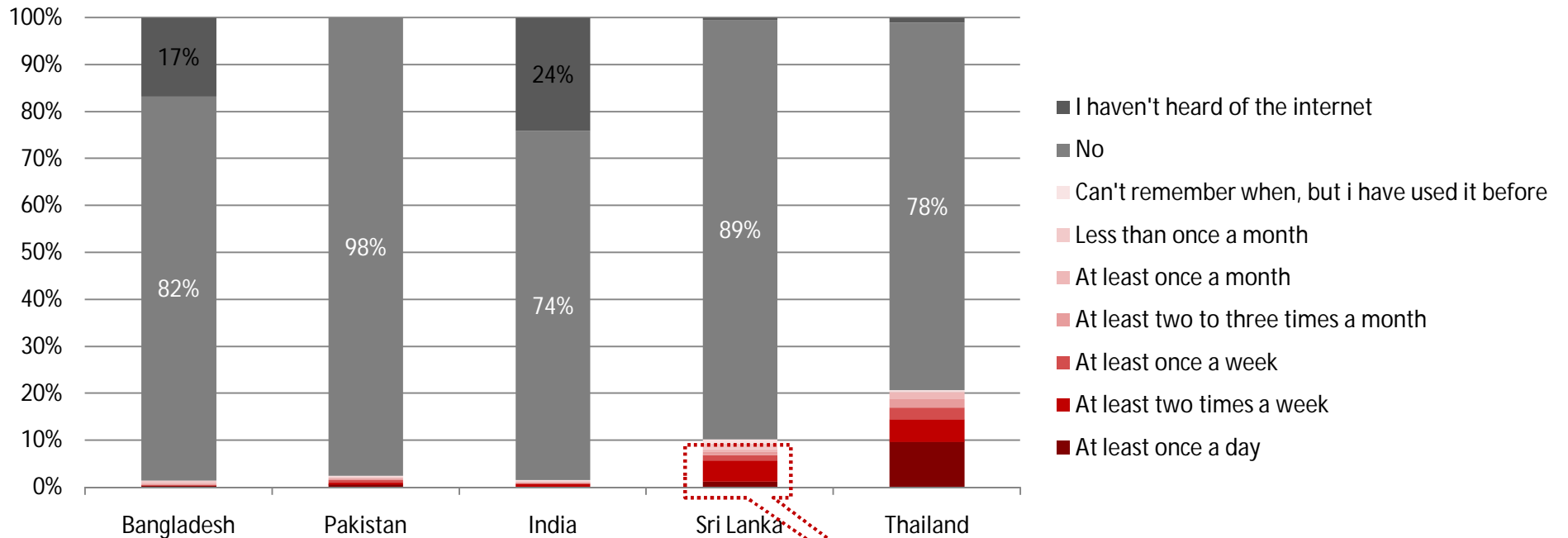
Computer usage low overall

Usage of computers (% of BOP teleusers)



Internet use similarly low; awareness problems in BD and IN

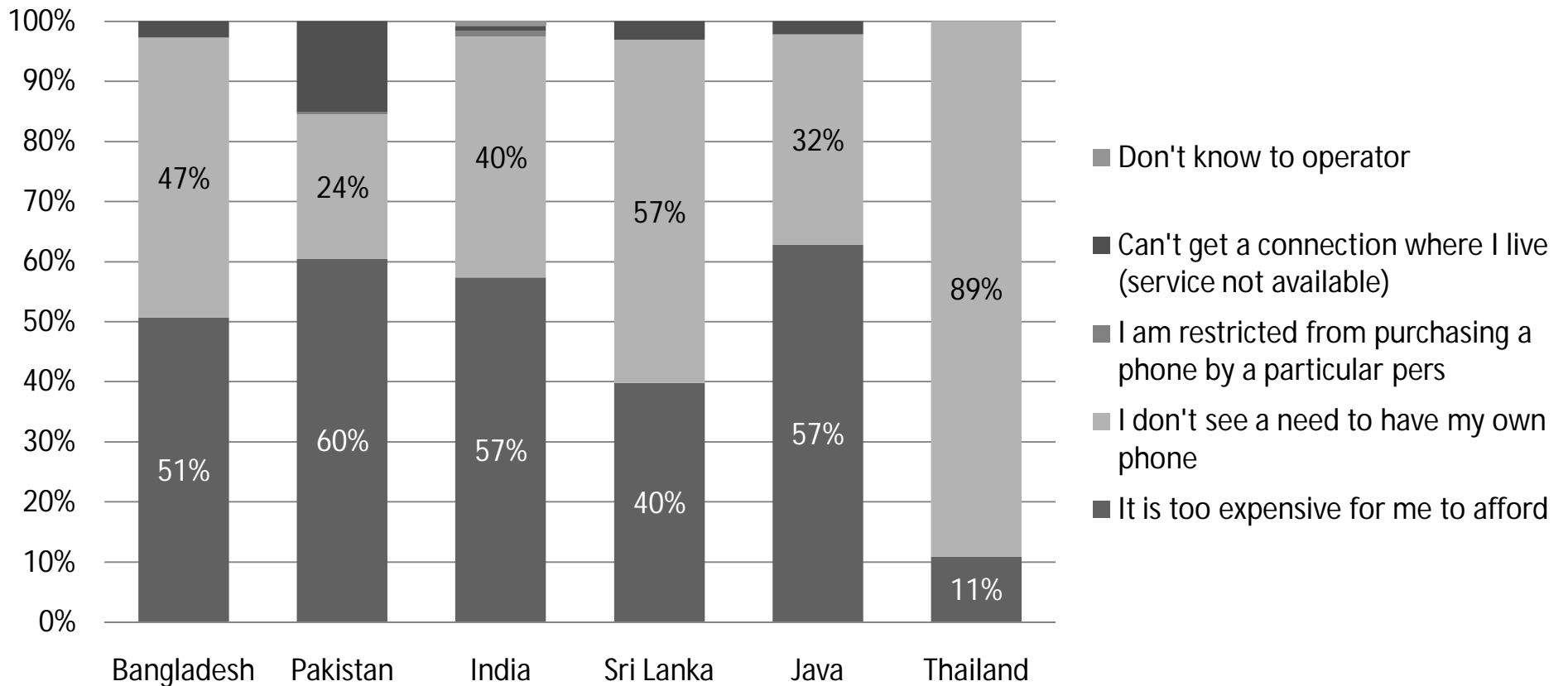
Internet use (% of BOP teleusers)



	Bangladesh	Pakistan	India	Sri Lanka	Thailand
Use the Internet (% of BOP teleusers)	2%	2%	1%	9%	21%

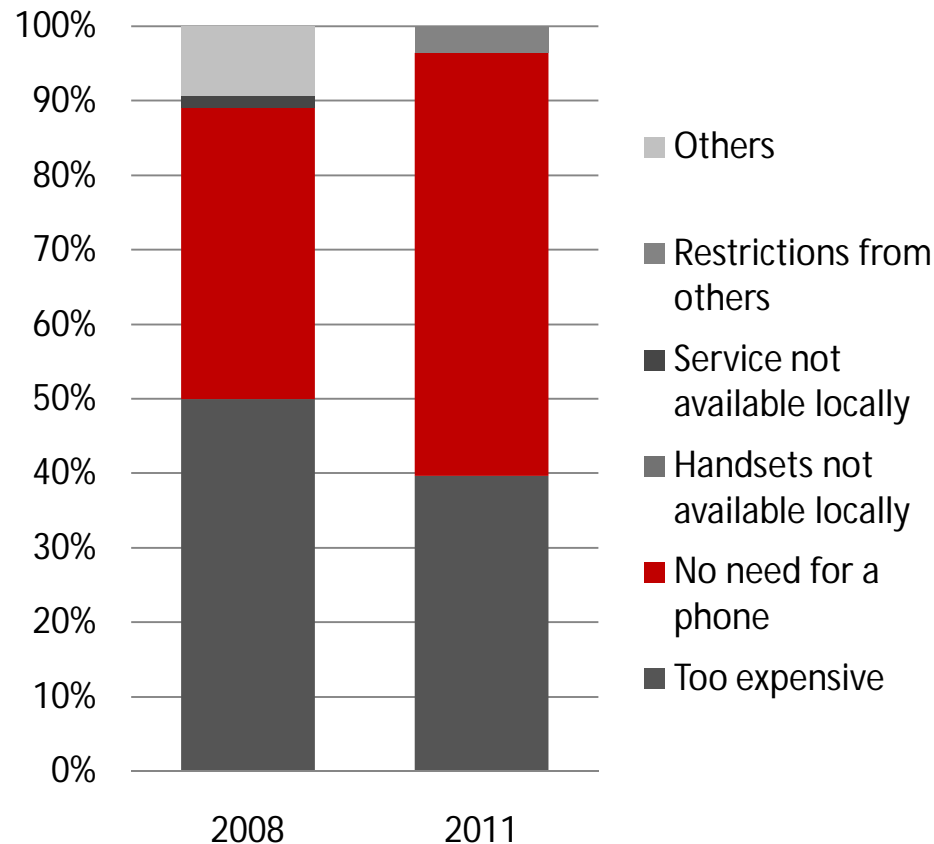
Non phone owners find phones too expensive or have no need for a phone (up from 40% in 2008)

Main reason for not owning a phone (% BOP who do not own phone)



% who don't want a phone is increasing as non-owner group becomes smaller

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

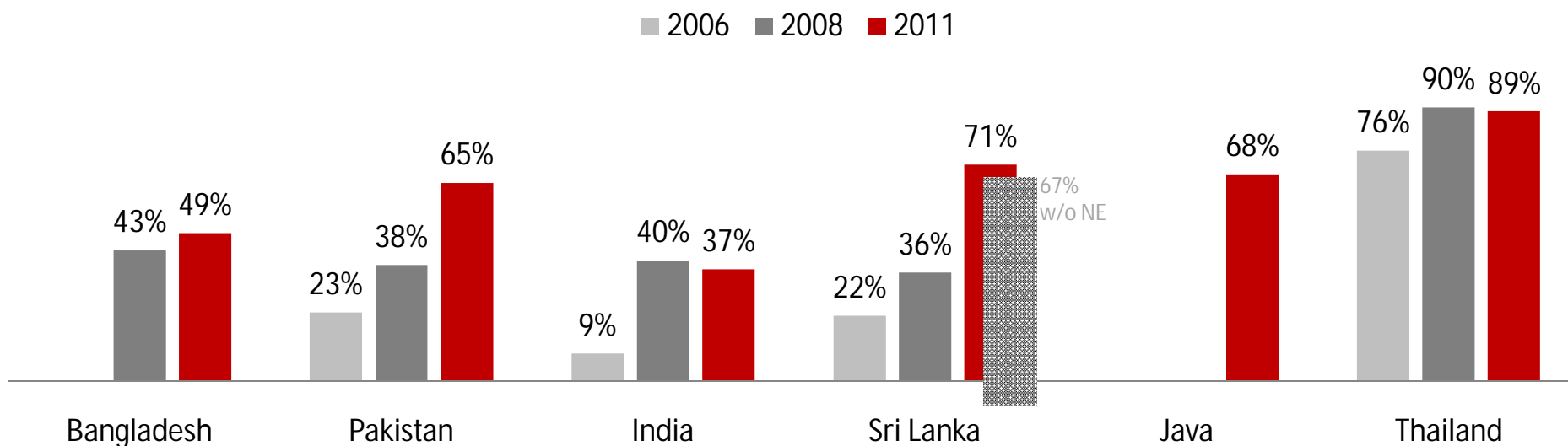


Findings

MOBILE OWNERSHIP AND USE

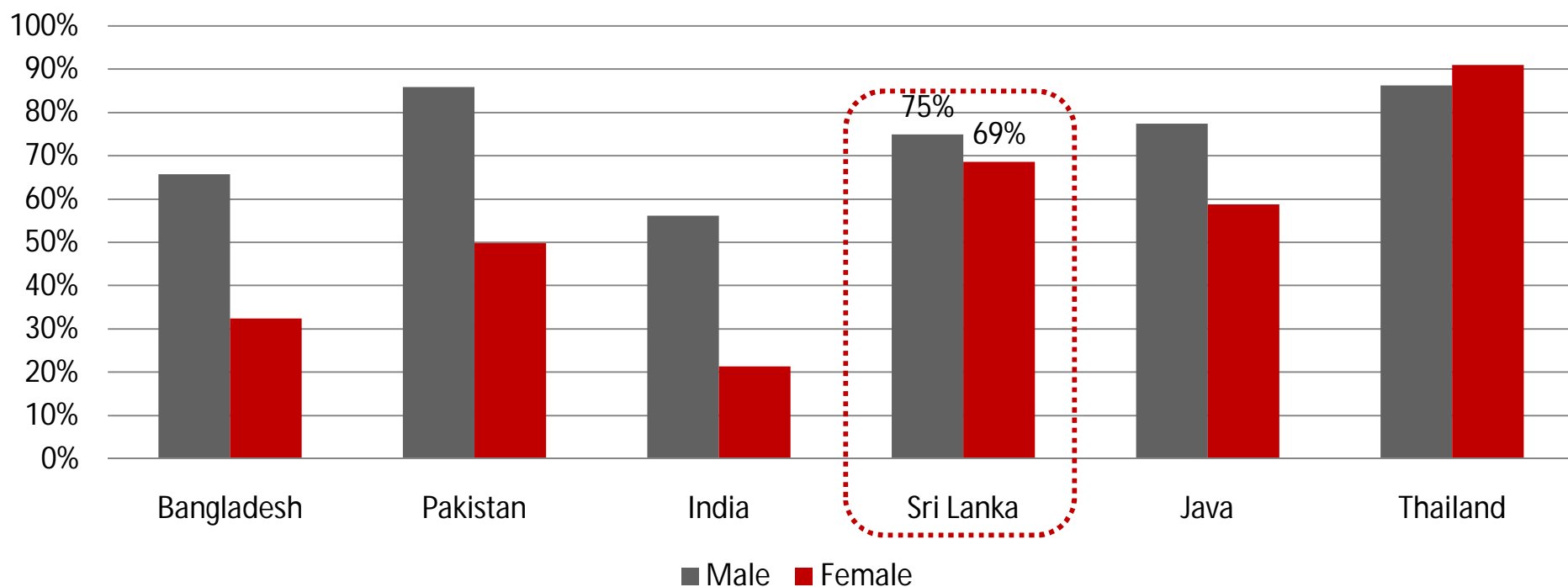
Significant increases in mobile ownership in Sri Lanka and Pakistan

Mobile phone ownership 2006-2011 - individual (% of BOP teleusers)



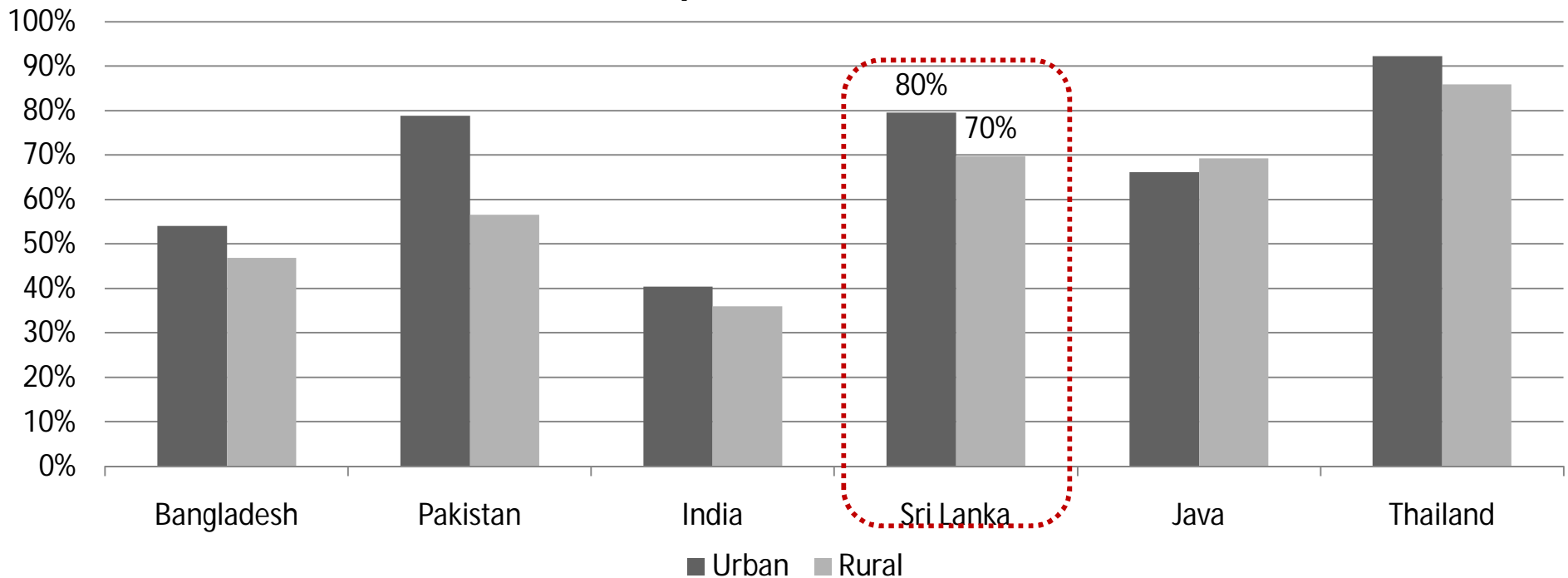
Gender gap in LK BOP mobile ownership is small

Mobile ownership - individual (% BOP teleusers)



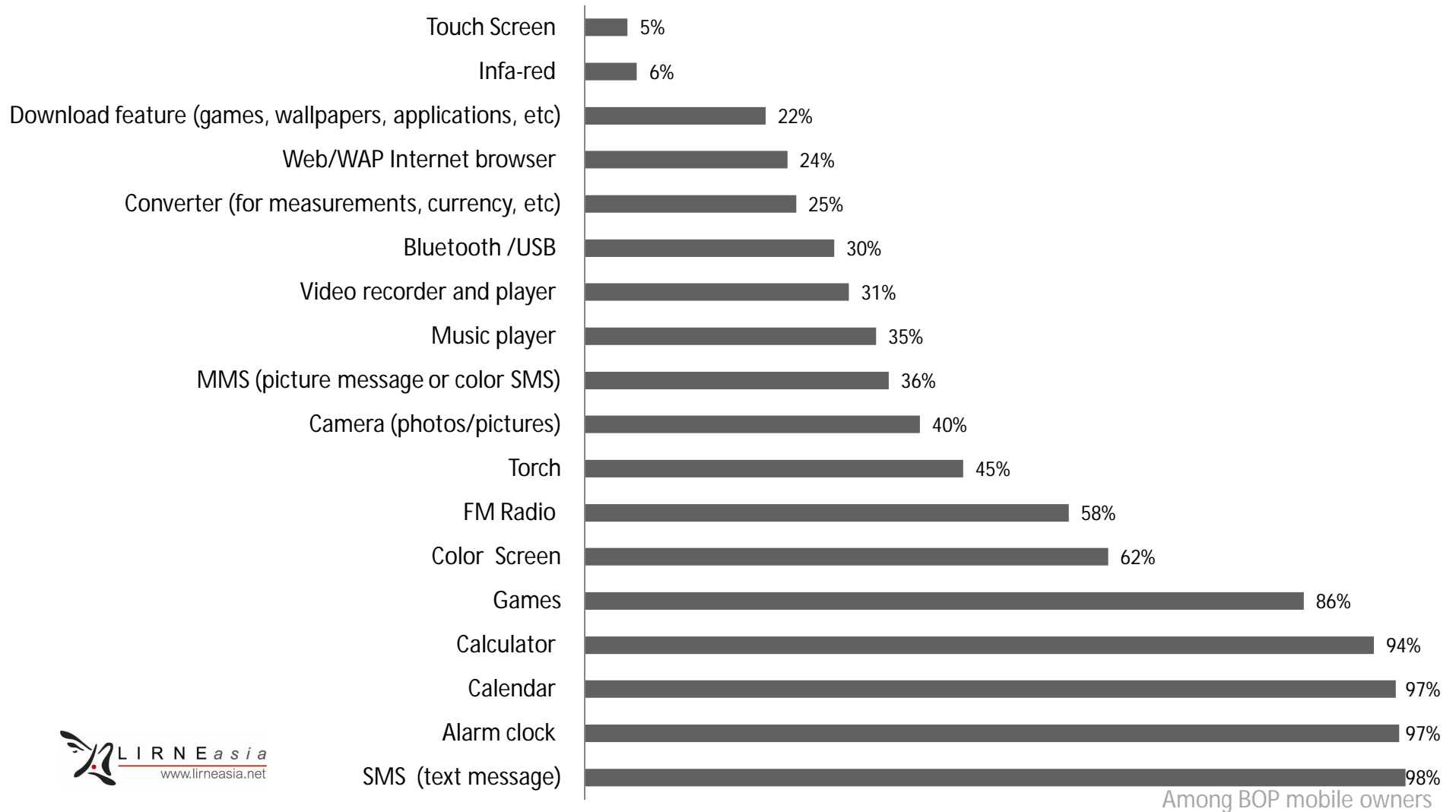
More people in urban areas own mobiles

Mobile ownership - individual (% BOP teleusers)



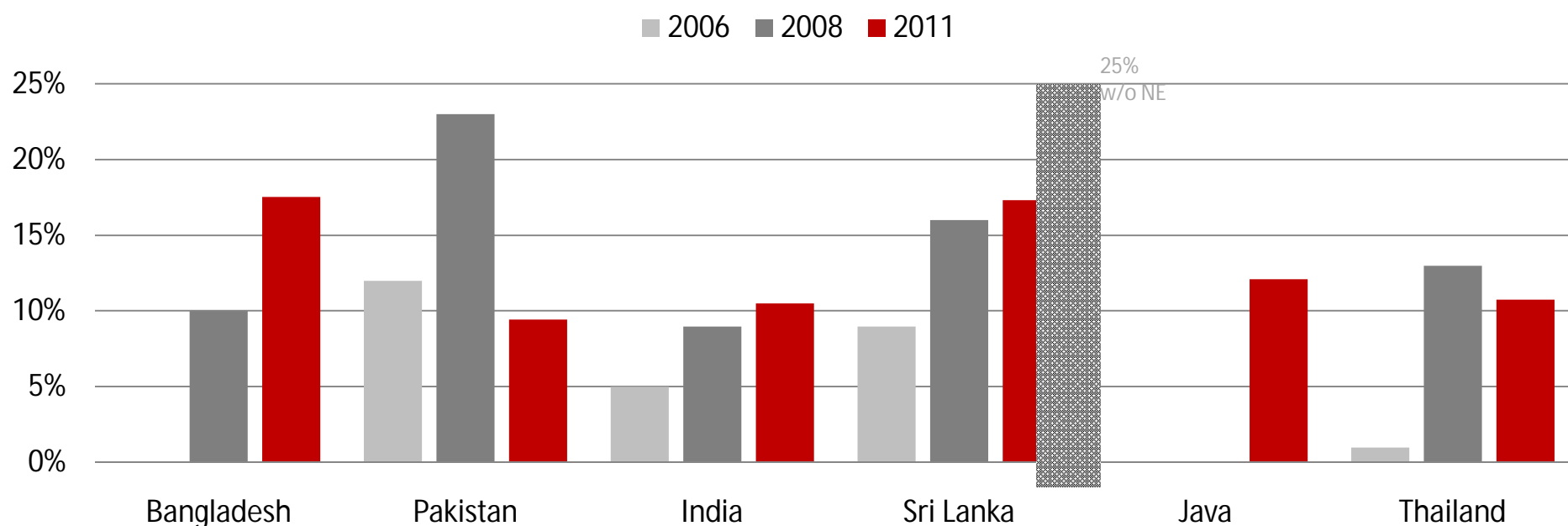
Majority of BOP phones have radio; 24% have a browser (perceived)

Features present on the mobile handset (% Sri Lankan BOP mobile owners)



Little change in multiple SIM ownership in Sri Lanka; Dramatic drop in Pakistan

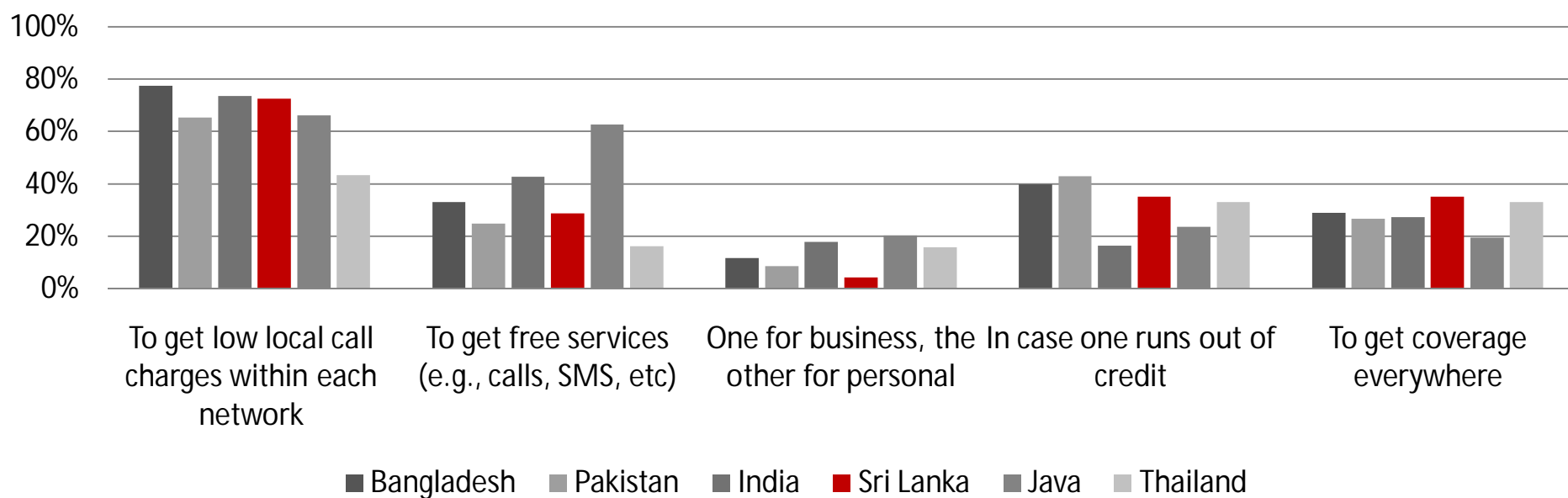
Multiple SIM ownership (% of BOP mobile owners)



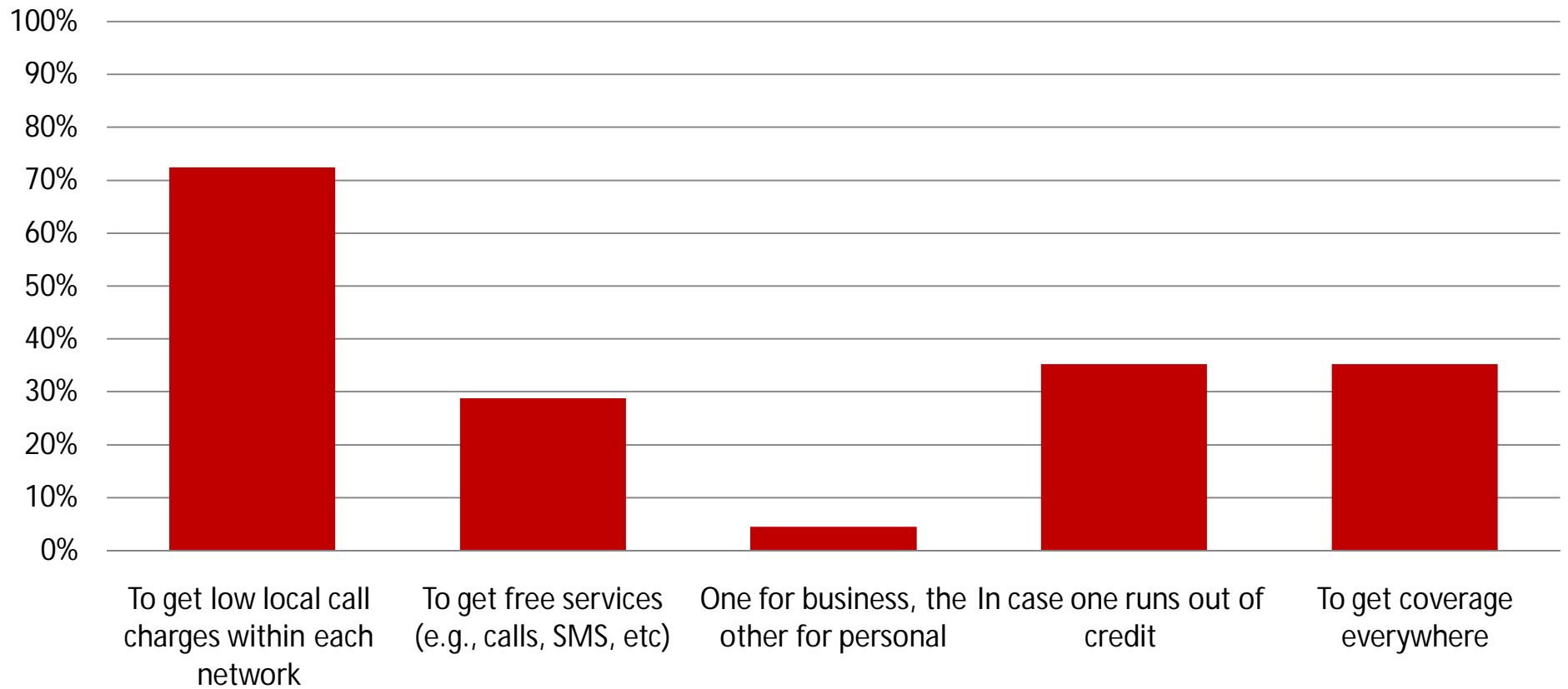
- Multiple SIM ownership higher among males than females

Cheaper on-net calls the main reason for multiple SIM ownership

Reason for multiple SIM ownership in Sri Lanka (% BOP MSOs)



Reason for multiple SIM ownership in Sri Lanka (% BOP MSOs)



Most BOP owners have one handset currently, but are on their second

	Bangladesh	Pakistan	India	Sri Lanka	Java	Thailand
No. of handsets owned currently (mean)	1.0	1.0	1.0	1.1	1.2	1.0
No. owned until now (mean)	2.5	1.9	1.7	2.1	3.9	2.5

What they do with mobile phones

Among BOP mobile owners

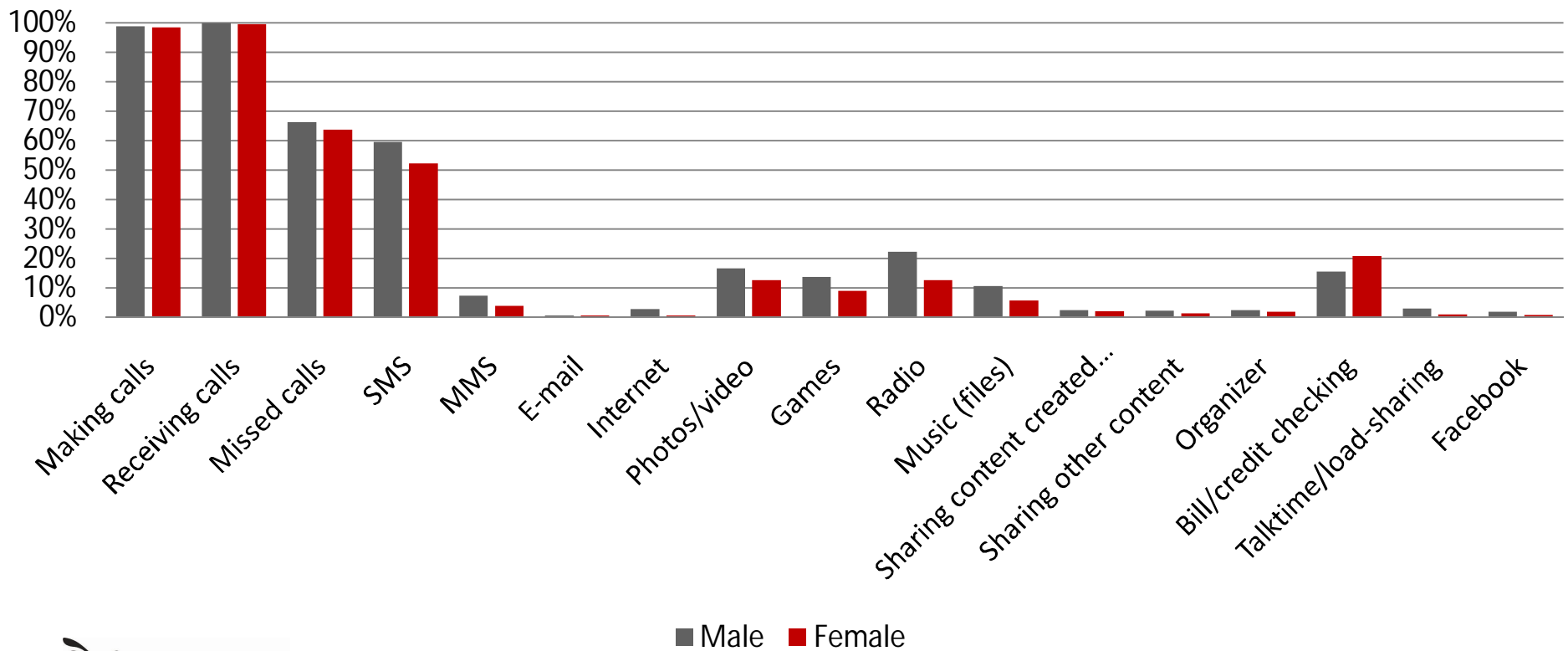
	% of BOP mobile owners					
	B'desh	Pakista n	India	S'Lanka	Java	Thailand
Make phone calls	100	99	100	99	96	100
Receive phone calls	100	95	99	100	94	99
Send/receive missed calls	86	71	78	65	54	24
Send/receive SMS	19	38	23	55	89	37
Send/receive MMS	1	2	3	5	14	8
Send/receive e-mail				1	3	2
Browse the Internet	3		1	1	10	5
Take photos/video	19	7	8	14	26	19
Play games	27	21	18	11	31	16
Listen to radio	13	15	12	17	26	18
Listen to music	25	5	15	8	26	30
Share that you have content created	1	1	3	2	8	3
Send/receive or download/upload other content	1	1	2	2	6	3
Use as an organizer	7	5	8	2	15	8
Check my bill/credit	13	20	11	18	16	3
Send/receive talk time/load	10	5	2	2	35	0
Access facebook	1			1	7	2
Access other social networking or blog applications					2	1

Sri Lanka 2008 v 2011: Playing games and balance checking decreased; camera and radio use increased

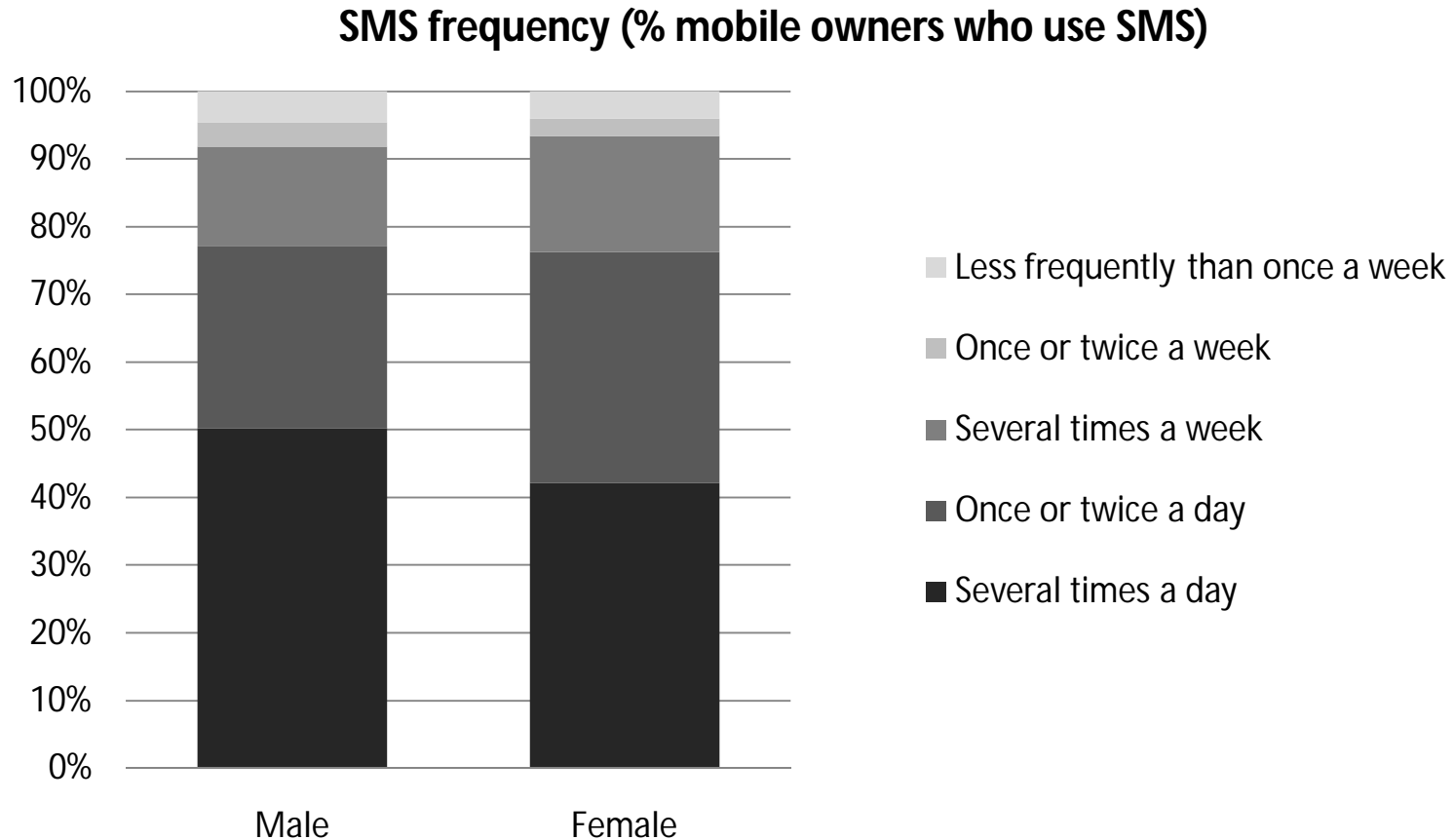
	% of BOP mobile owners	
	2008	2011
Make phone calls	100	99
Receive phone calls	100	100
Send/receive missed calls	73	65
Send/receive SMS	52	55
Send/receive MMS	6	5
Send/receive e-mail	0	1
Browse the Internet	2	1
Take photos/video	8	14
Play games	21	11
Listen to radio	12	17
Listen to music	7	8
Share that you have content created	6	2
Send/receive or download/upload other content	8	2
Use as an organizer	4	2
Check my bill/credit	50	18
Send/receive talk time/load	n/a	2
Access facebook	n/a	1

Sri Lanka male vs female: Slightly higher use for entertainment by males

What BOP owners use their mobiles for: male vs female (% of BOP mobile owners)



Sri Lanka male vs female: Males text more than women

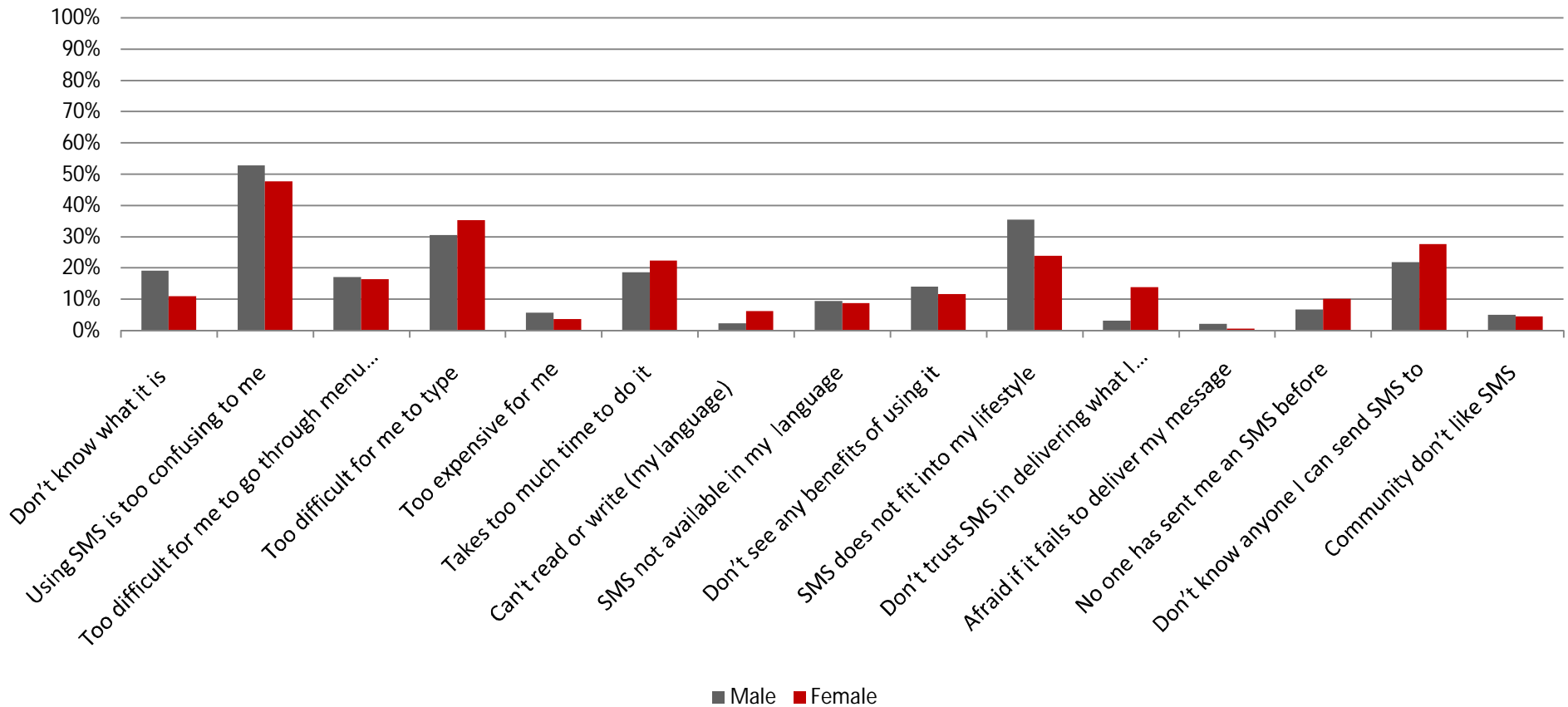


Main reason for not using SMS: it's too confusing

	Bangladesh	Pakistan	India	Sri Lanka	Thailand
I don't know what it is	54	11	61	14	3
Using SMS is too confusing to me	41	50	42	50	20
It is too difficult for me to go through menu and open it	6	20	25	17	8
It is too difficult for me to type	10	31	34	33	33
It is too expensive for me	3	5	8	4	13
It takes too much time to do it	12	27	19	21	27
I cannot read or write (my language)	8	33	12	5	0
SMS is not available in my own language	3	2	4	9	0
I don't see any benefits of using it	11	6	9	13	16
SMS does not fit into my lifestyle	5	5	4	28	17
I don't trust SMS in delivering what I want to say	4	2	2	10	2
I'm afraid if it fails to deliver my message	1	4	1	1	4
No one has sent me an SMS before	1	1	3	9	10
I don't know anyone I can send SMS to	4	1	1	25	50
People in my community don't like SMS	0	2	3	5	10

Sri Lanka male vs female: No big difference in reasons for not using SMS

Reason or not using SMS (% BOP mobile owners who only use voice calls)

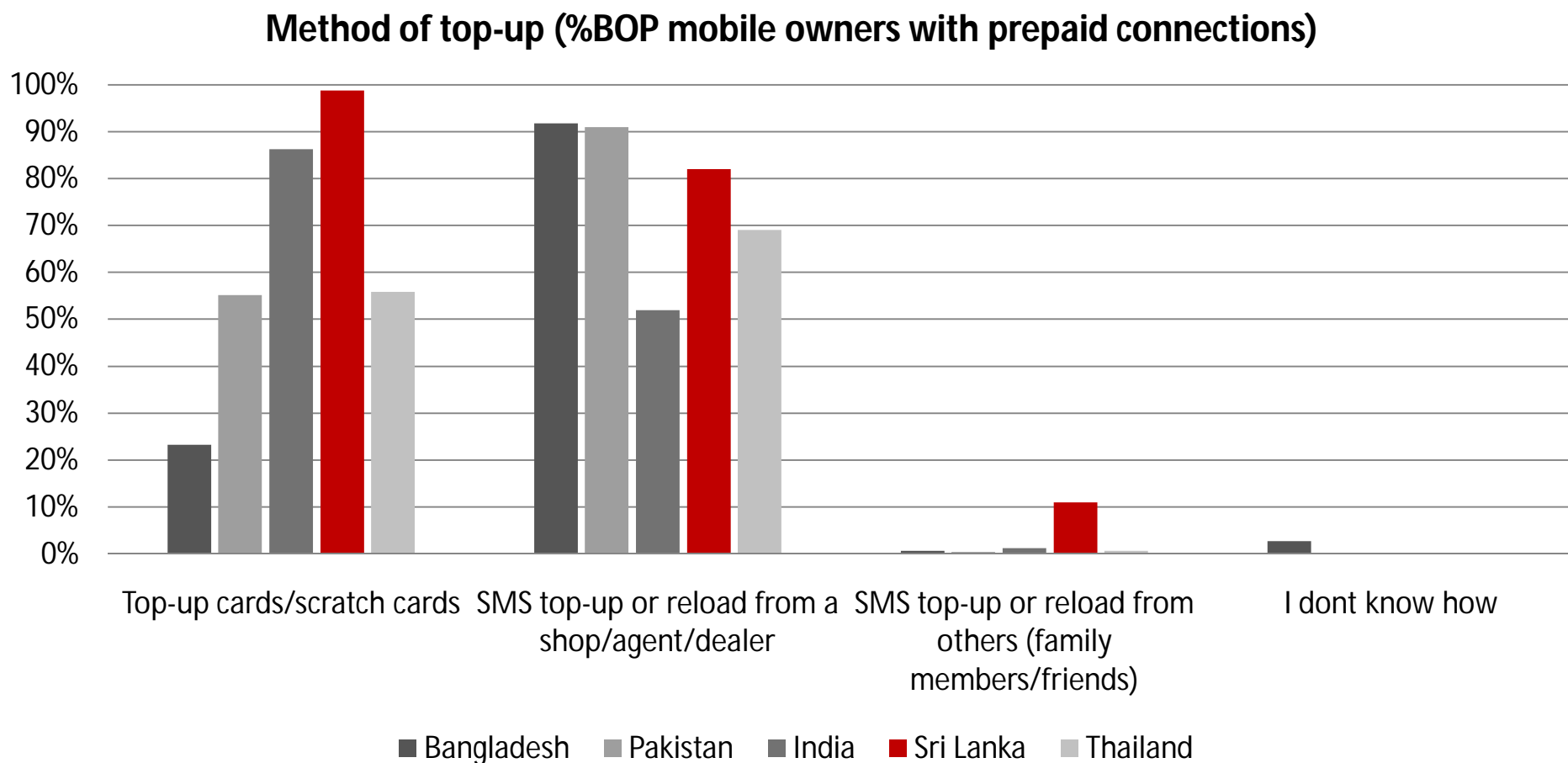


Postpaid at BOP only in Sri Lanka and Thailand

Primary mobile connection (% BOP mobile owners)

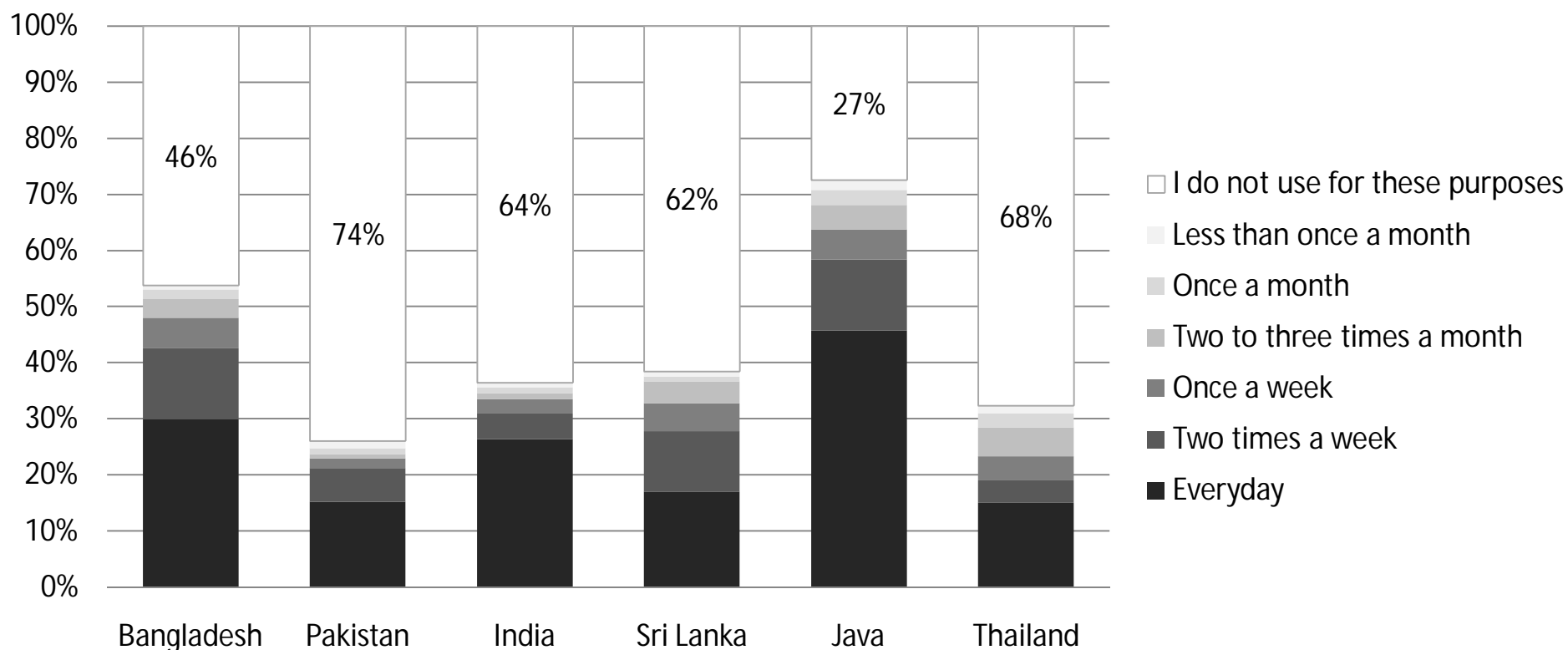
	Bangladesh	Pakistan	India	Sri Lanka	Java	Thailand
Pre paid	100	100	100	95	100	96
Post paid	0	0	0	5	0	4

Top-up cards still most popular in Sri Lanka and India



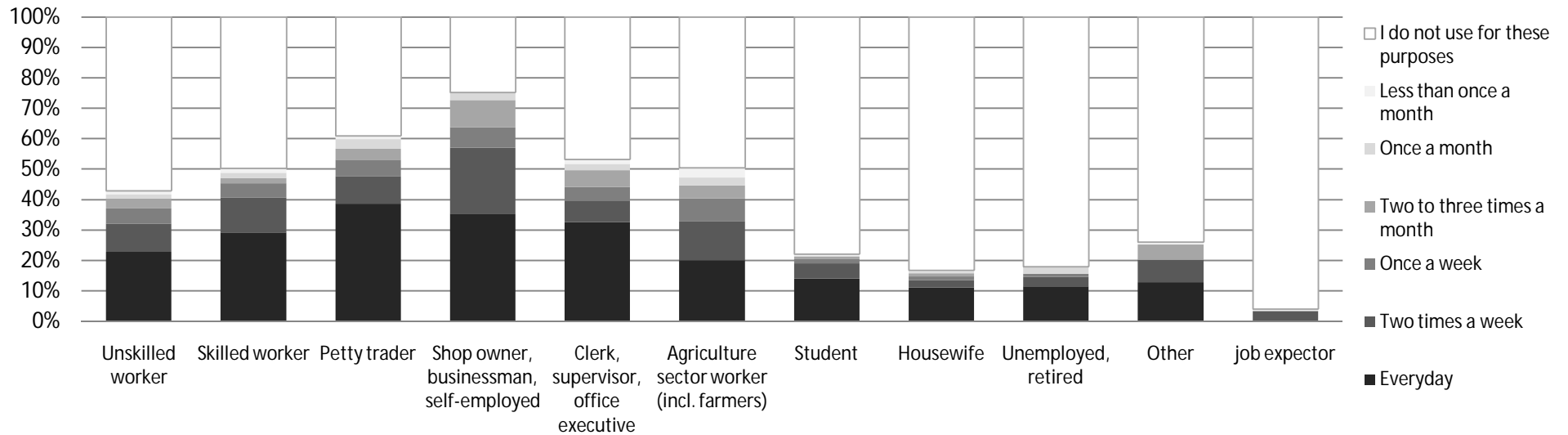
Majority don't use mobiles for financial, business or work related communication

Use of phone for financial, business or work related communications (% of phone owners)



Entrepreneurs and petty traders are heaviest business users

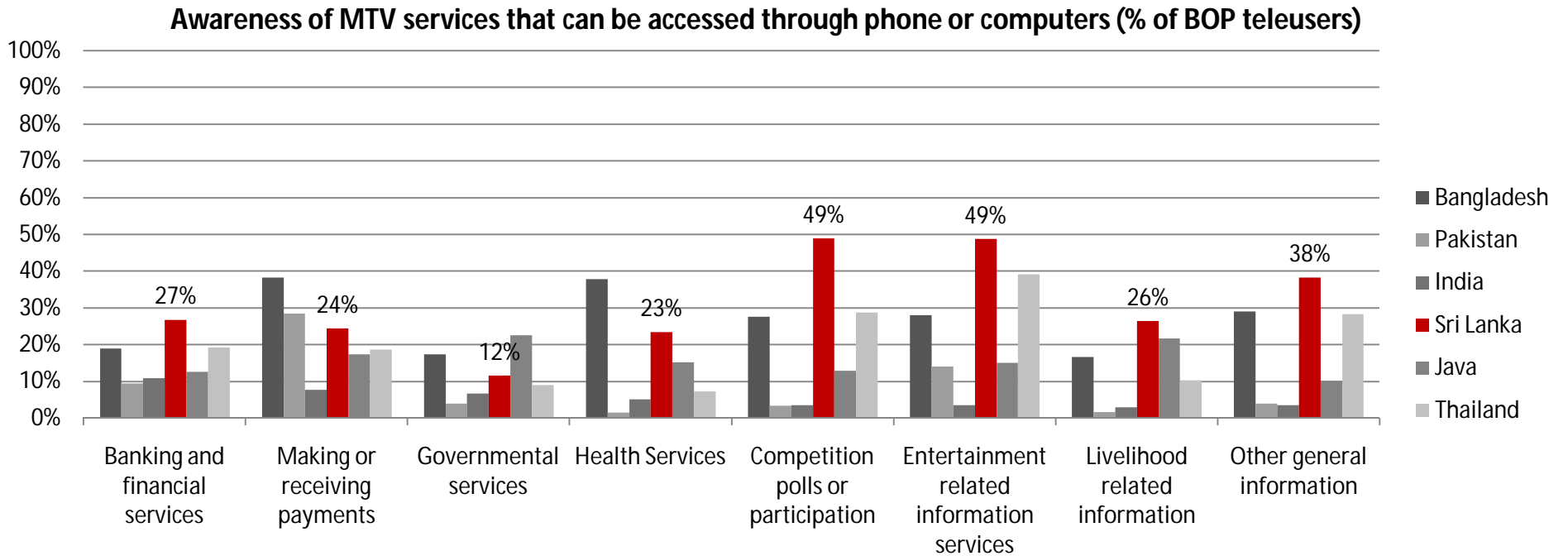
Use of the phone for financial, business or work-related purposes (% of BOP teleusers)



Findings

MORE-THAN-VOICE

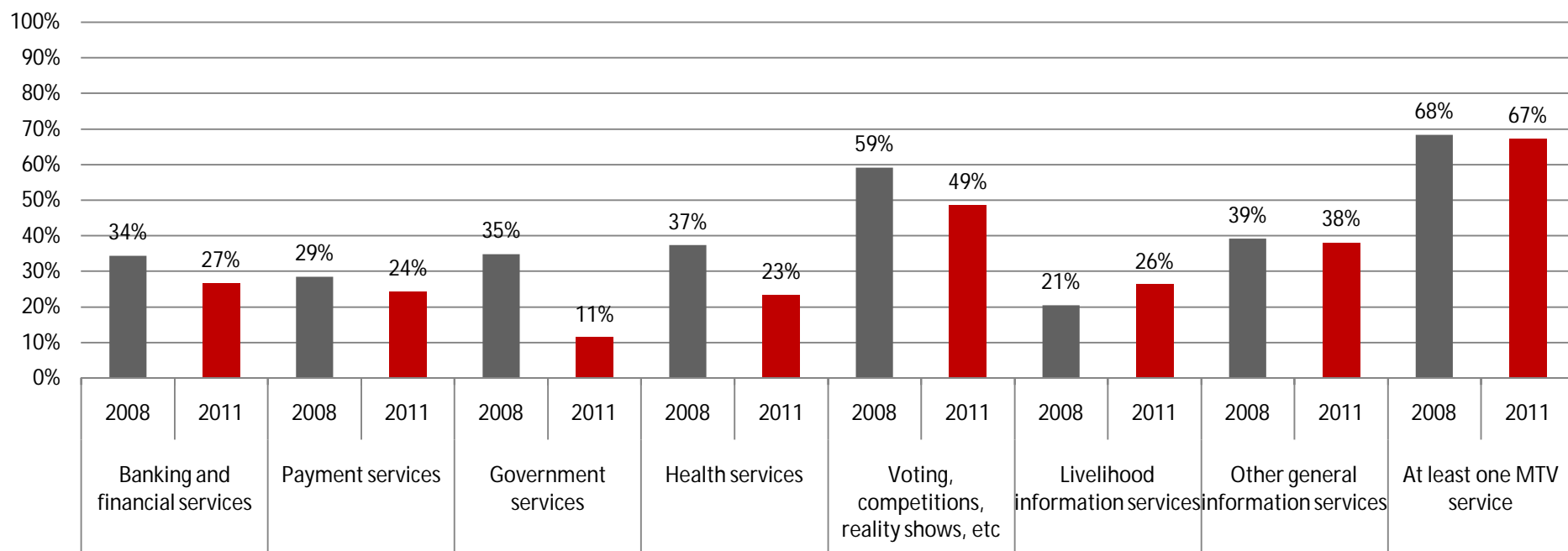
Awareness of entertainment and competition polls highest in Sri Lanka



Among BOP teleusers

In Sri Lanka awareness of MTV services has declined

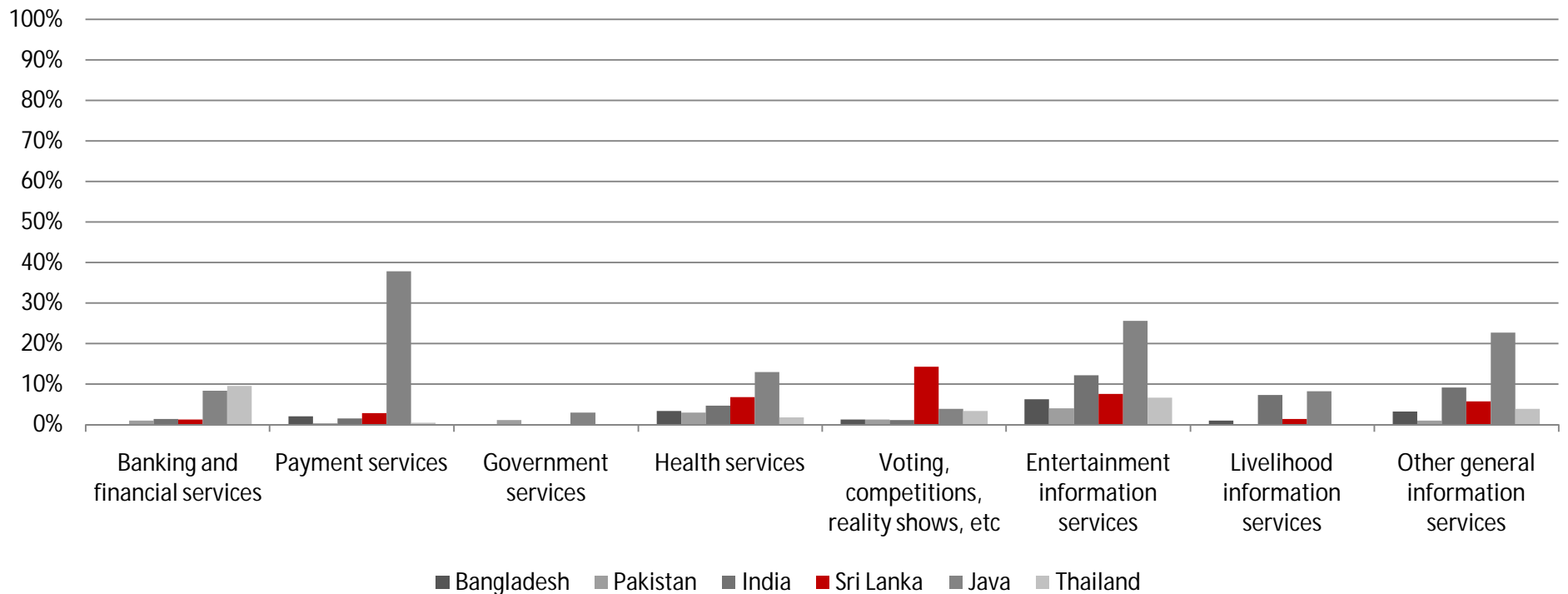
MTV Awareness 2008 vs 2011 (% of BOP teleusers)



Among BOP teleusers

BOP not taking up MTV services

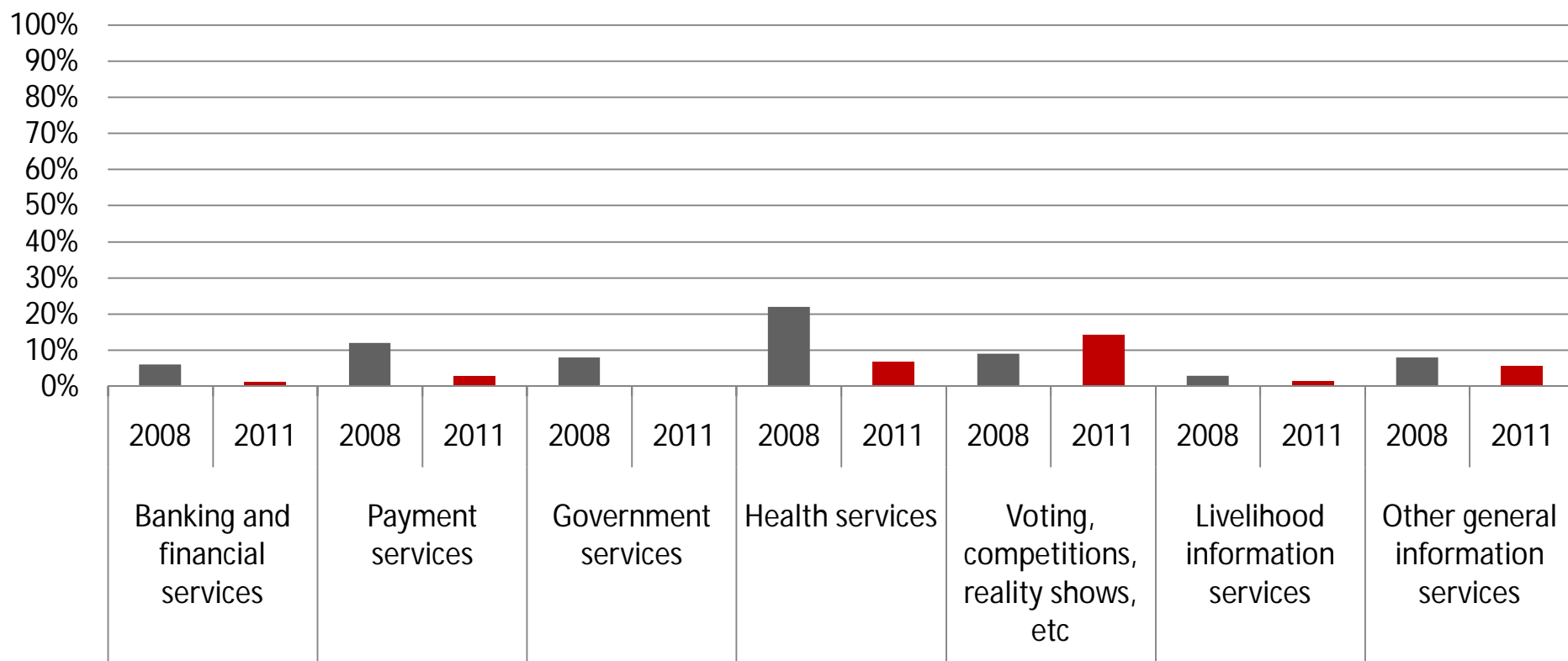
MTV service usage through phone or computer (% BOP aware of services)



Among BOP who are aware of MTV services)

Sri Lanka 2008 vs 2011: MTV usage at BOP in Sri Lanka has fallen

MTV usage (% BOP teleusers who are aware of those services)



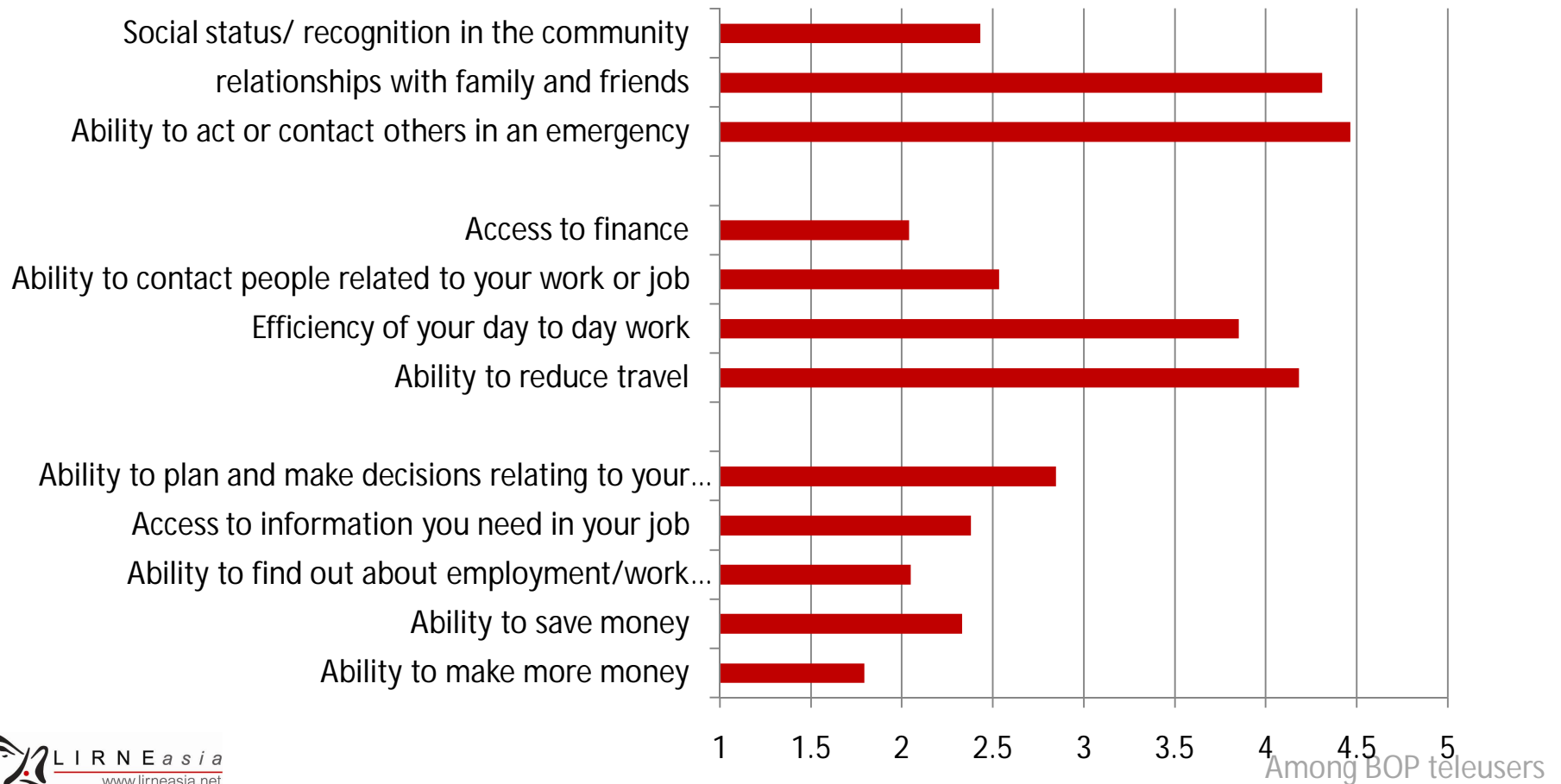
Among BOP teleusers who are aware of MTV services

Findings

PERCEIVED BENEFITS

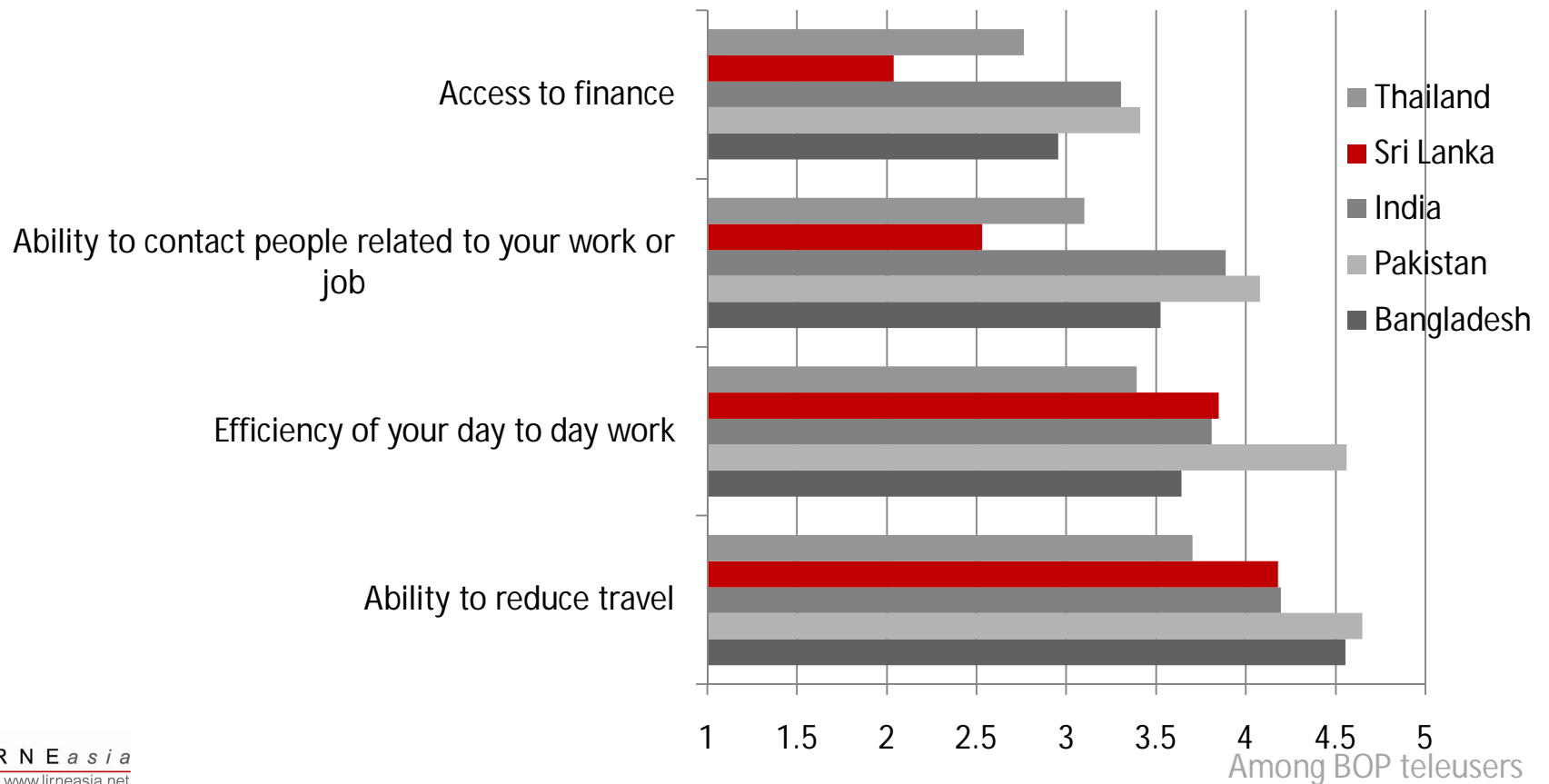
Main perceived benefits of phone access in **Sri Lanka** are emergency communication, maintaining relationships and saving on travel

Benefits of phones in Sri Lanka (mean rating)
1=No change 5=Improved greatly



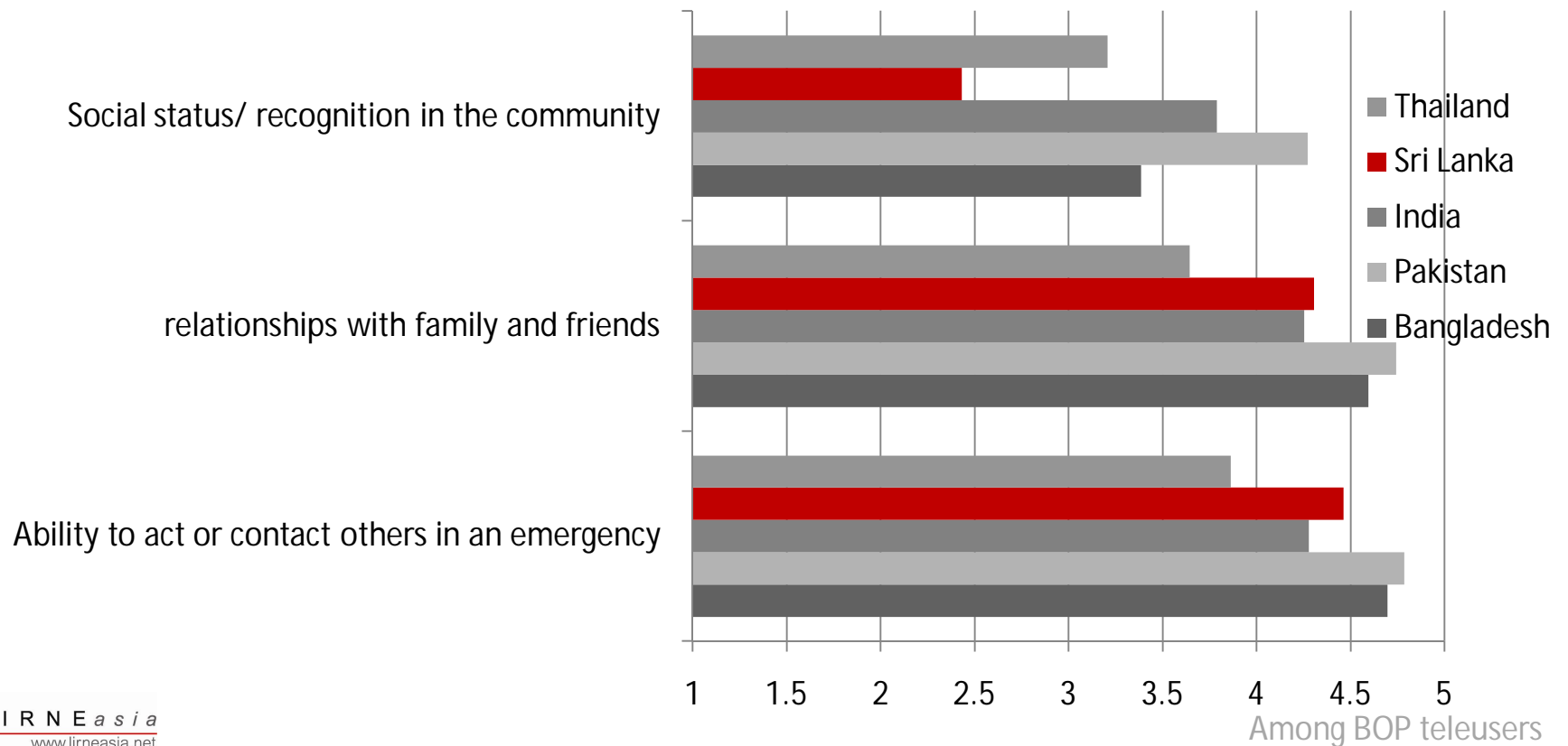
Main economic benefit of phone is reducing travel

Benefits of phones (%BOP teleuser)
1=No change 5=Improved greatly



The phone mainly benefit personal life

Benefits of phones (%BOP teleuser)
1=No change 5=Improved greatly

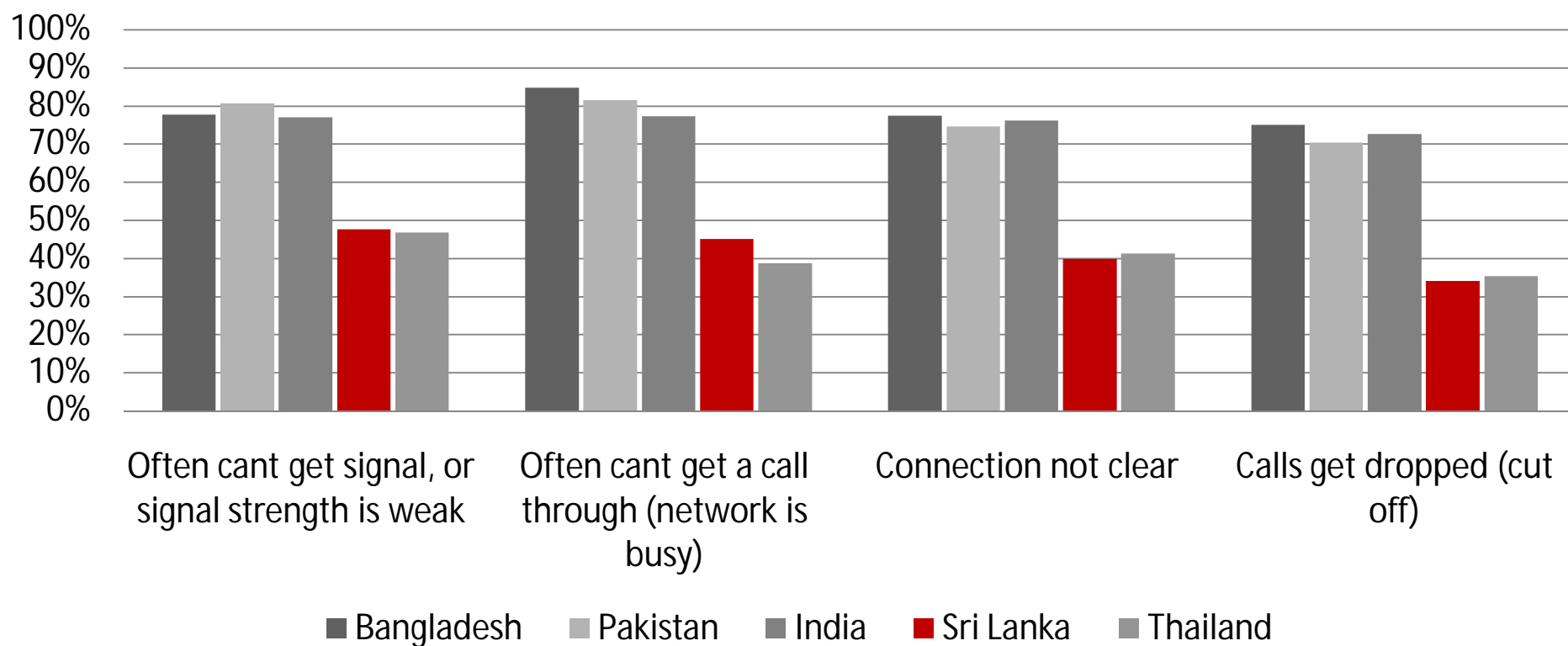


Findings

QUALITY OF SERVICE

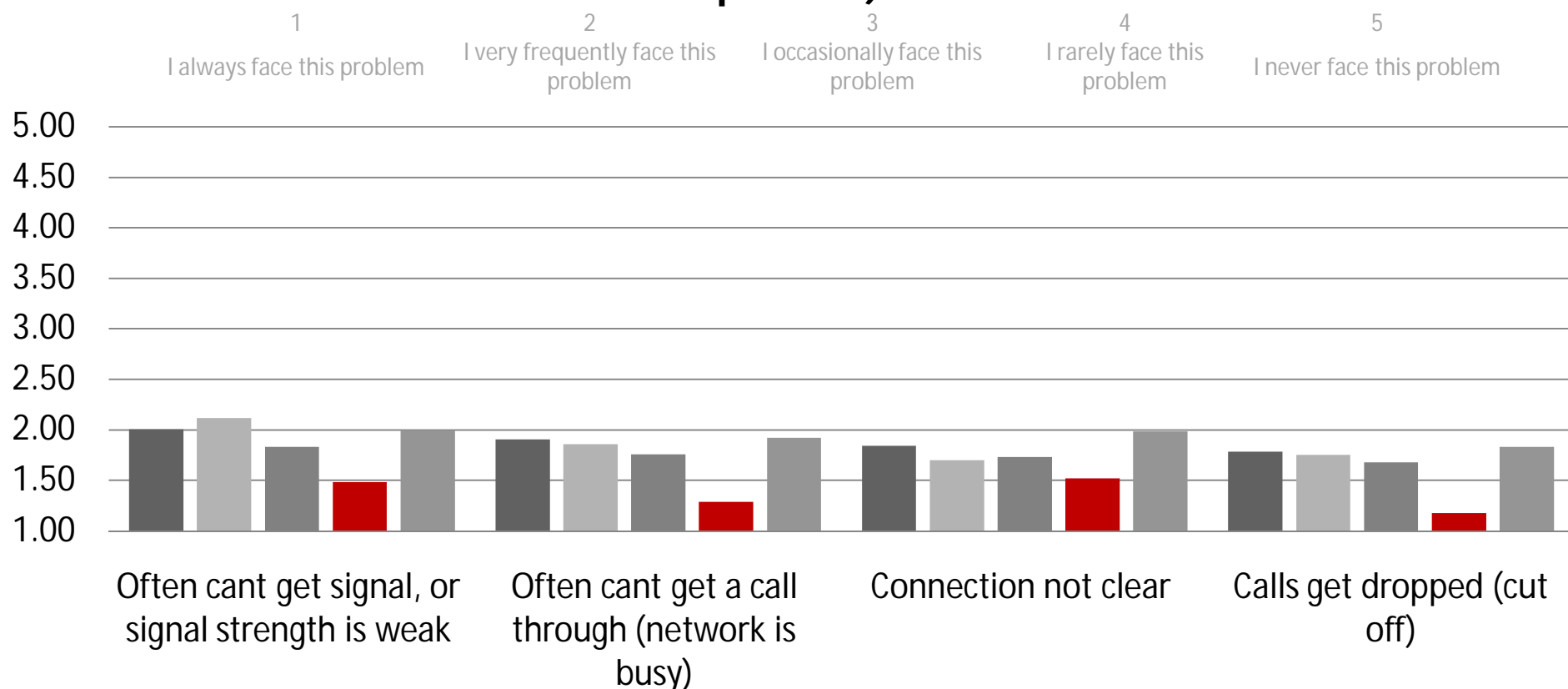
Sri Lankan BOP owners complain less than sub-continent BOP owners

Mobile quality problems (% of BOP mobile owners that face the problem)



Sri Lanka performs best on perceptions of how frequent quality problems are faced by BOP

Frequency of the problem faced (among mobile owners that face the problem)



Findings

SUMMARY

Summary

- Access is improving at both personal and household levels
 - Phones set to overtake TV and radio
 - Mostly mobile: 71% of BOP own a mobile; many on second handset
 - Multiple-SIM ownership high in NE; main reason is lower on-net rates
 - LK performs best on perceived quality of service
- Usage is still limited to voice (with some SMS, radio, games etc)
 - Little use of mobile for productive purposes; benefits mostly perceived in emergency communication and maintaining relationships
 - Awareness and use of MTV services among BOP not progressed much since 2008

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