

# Teleuse@BOP4: Preliminary findings

Rohan Samarajiva

9 December 2011, Bangkok



The work was carried out with the aid of a grant from the International Development Research Centre, Ottawa, Canada ([www.idrc.ca](http://www.idrc.ca)) and UKaid from the Department for International Development, UK ([www.dfid.uk](http://www.dfid.uk)).



# 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					

# Focus on productive use of ICTs in 2011

- Representative sample of BOP *teleusers* (6 countries)
  - Questions on productive use of ICTs; 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

# Sample sizes 2011

	Bangladesh	Pakistan	India	Sri Lanka <sup>[1]</sup>	Java <sup>[2]</sup>	Thailand	Total
BOP teleusers	2,050	1,835	3,181	1,200	1,088	800	<b>10,154</b>
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		Java		Thailand	
Dhaka	697	Sindh	421	Uttar Pradesh	853	Western	169	Jakarta	58	Chiang Mai	85
Chittagong	111	Punjab	1062	Harayana	114	Central	162	Banten	144	Pisanulok	86
Sylhet	154	Baluchistan	96	Assam	146	Southern	131	West Java	253	Suratthani	36
Rajshahi	623	Khyber Paktoon Khuwa	254	Tirupura	18	North Western & North Central	203	Central Java	284	Songklah	37
Khulna	303			West Bengal	440	Uva & Sabaragamuva	231	Yogyakarta	34	Nakornrachasima	218
Barisal	161			Bihar	448	Northern & Eastern	304	East Java	315	Khonkaen	215
				Rajasthan	294					Nakornsawan	63
				Gujarat	268					Chonburi	59
				Tamil Nadu	326						
				Karnataka	272						
	<b>2050</b>		<b>1834</b>		<b>3181</b>		<b>1200</b>		<b>1200</b>		<b>800</b>

# AGENDA

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

Findings

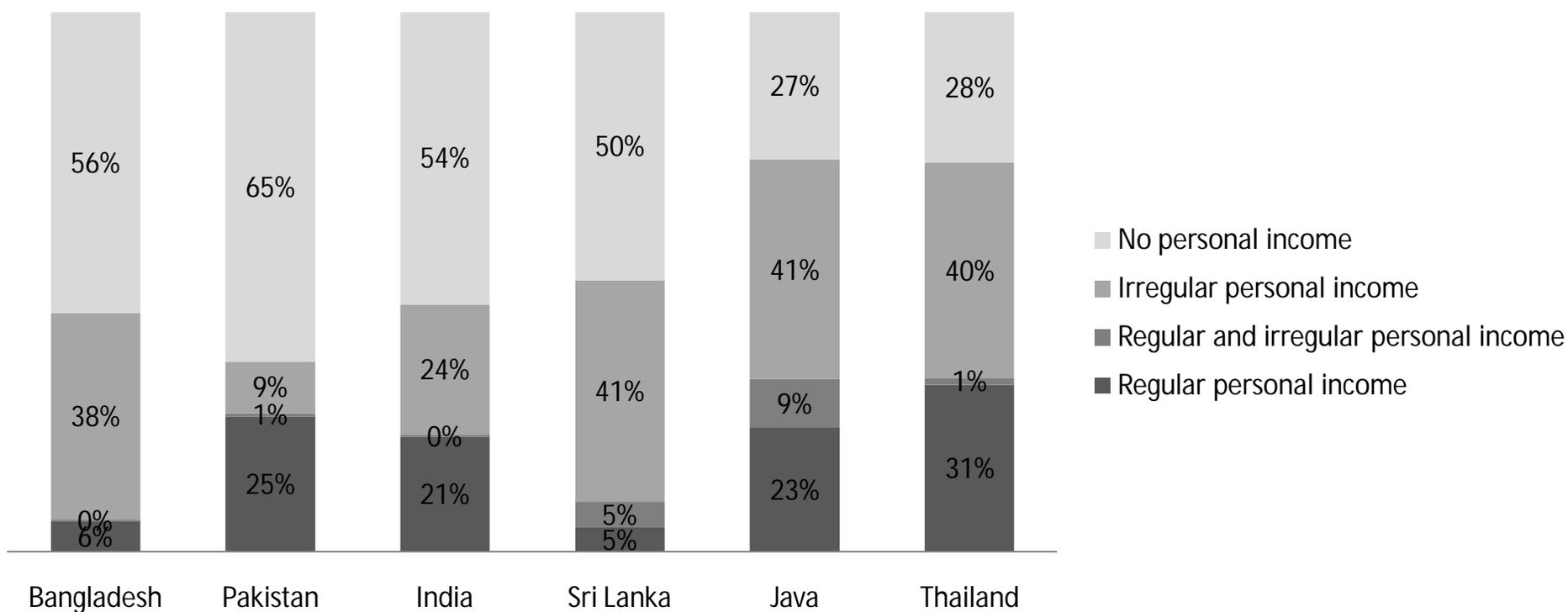
# **SAMPLE PROFILE**

# Sample profile

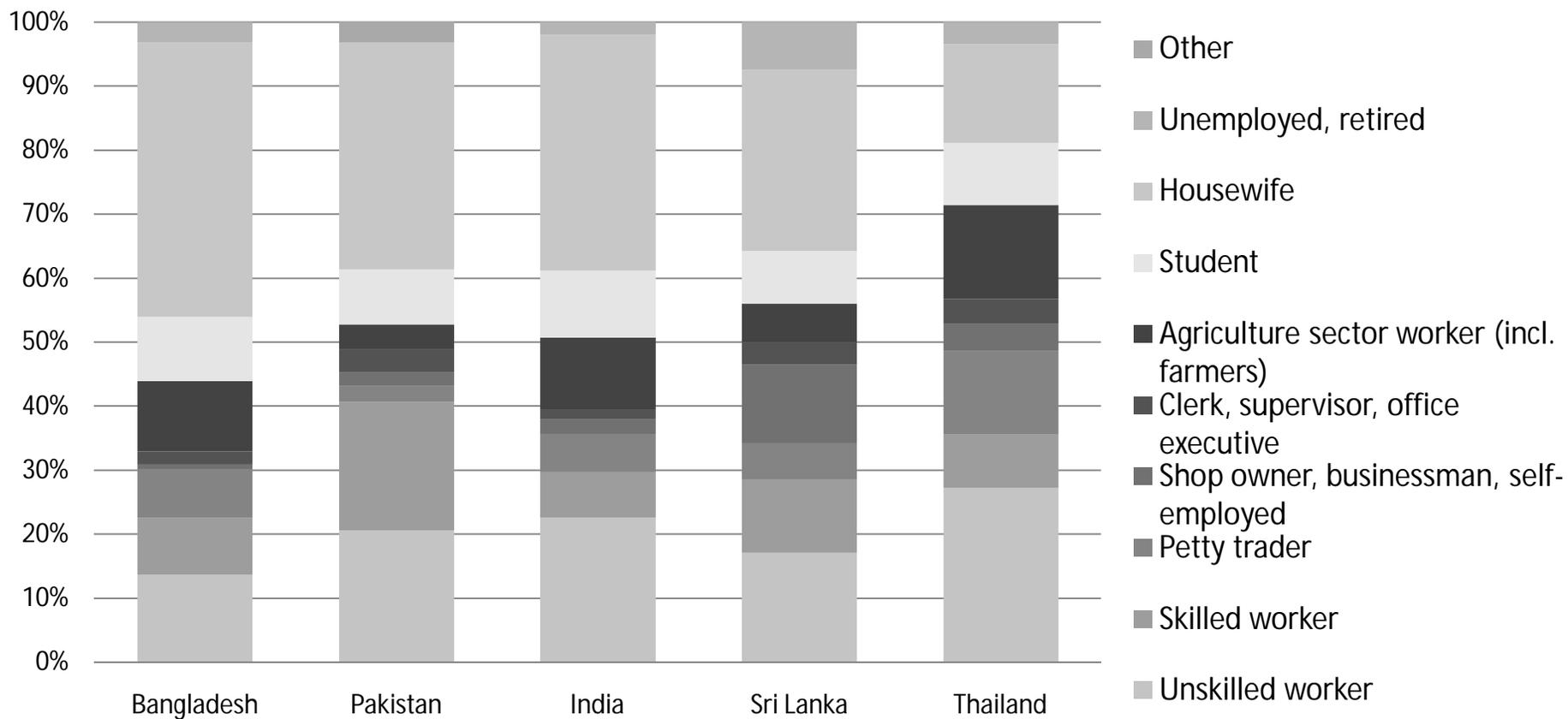
	Gender		Age		Location	
	Male (%)	Female (%)	Mean	SD	Urban (%)	Rural (%)
Bangladesh	49	51	33	12	26	74
Pakistan	42	58	31	10	38	62
India	45	56	32	12	19	81
Sri Lanka	40	60	35	12	15	85
Java	52	48	34	13	25	75
Thailand	49	51	36	13	43	57

# Majority either have no, or irregular, personal incomes

Personal income status (% of BOP teleusers)

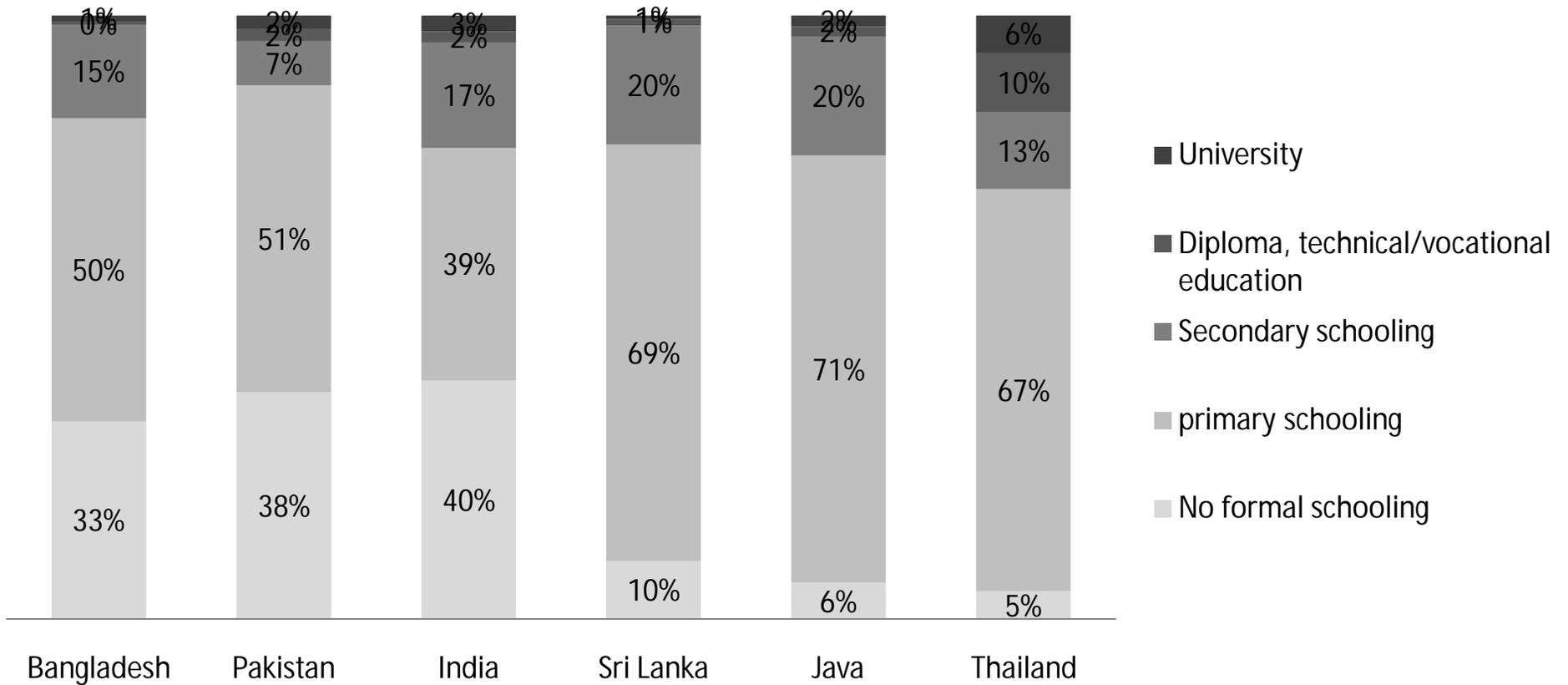


### Primary occupation (% of BOP teleusers)



# Most of BOP only have primary education

Highest educational achievement (% BOP teleusers)



Findings

# **ACCESS**

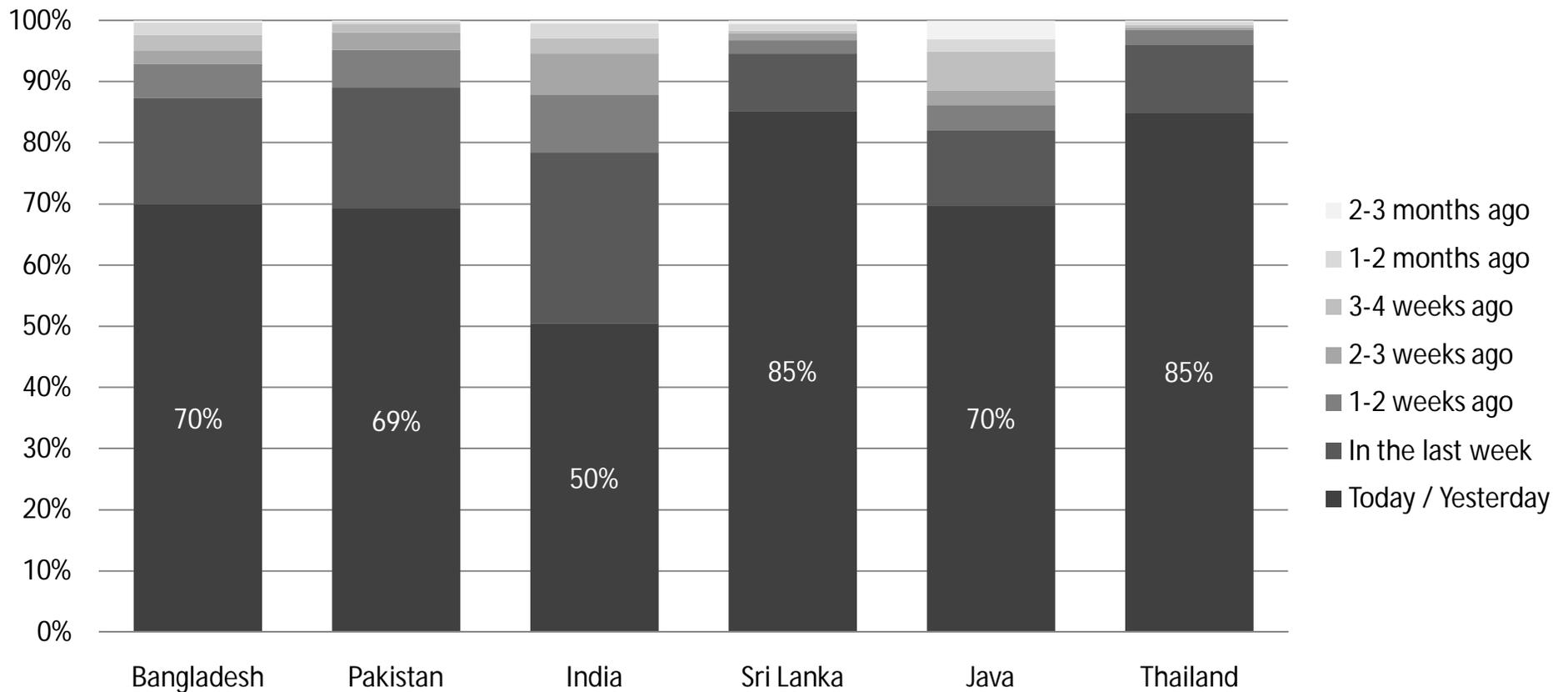
# 89-99% of BOP have used a phone in previous 3 months

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%

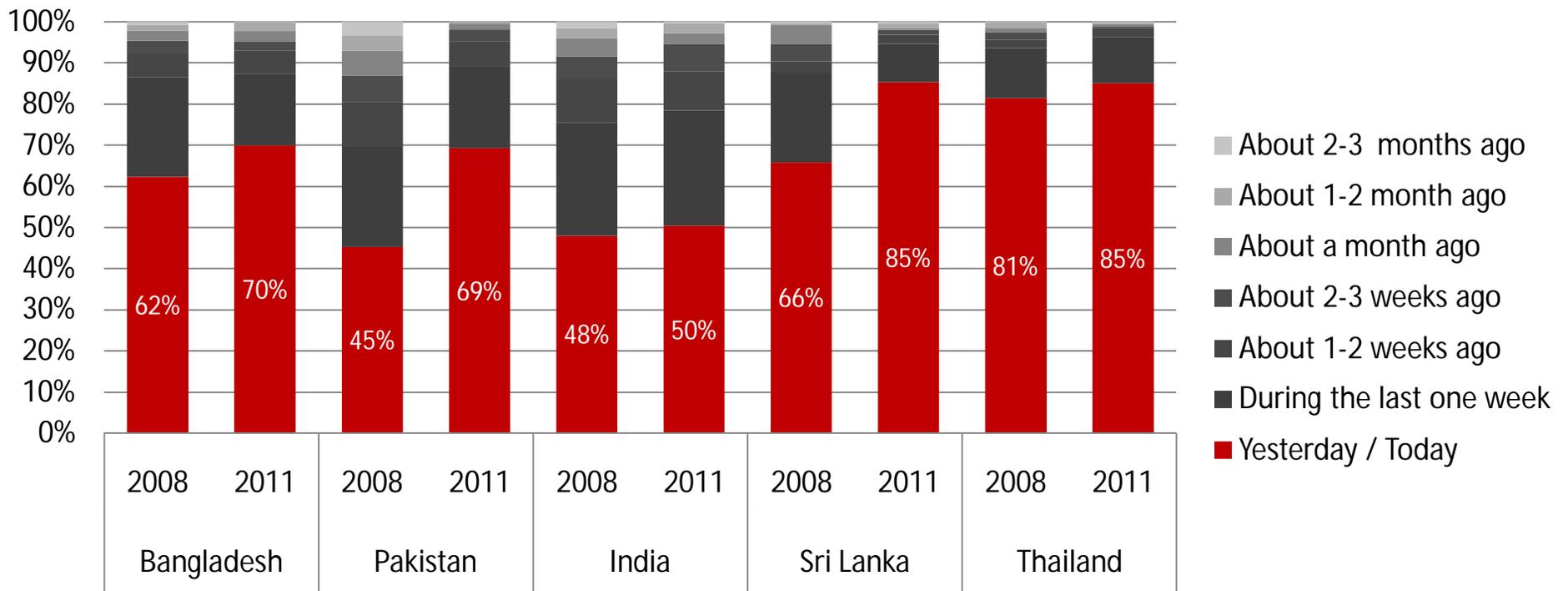
# More 70% of BOP has made a call during the last week, except in IN

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



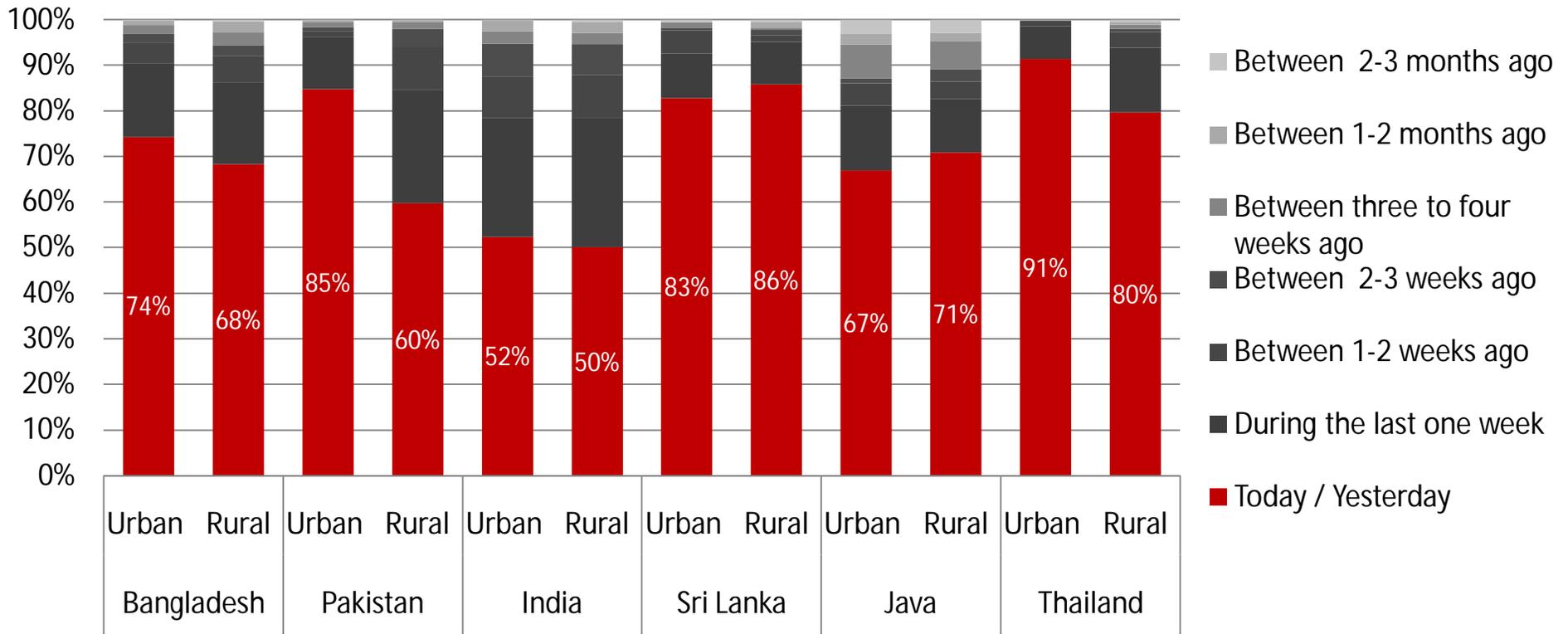
# 2008 vs 2011: % of BOP who made a call on the "day" of the survey increased in all countries

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



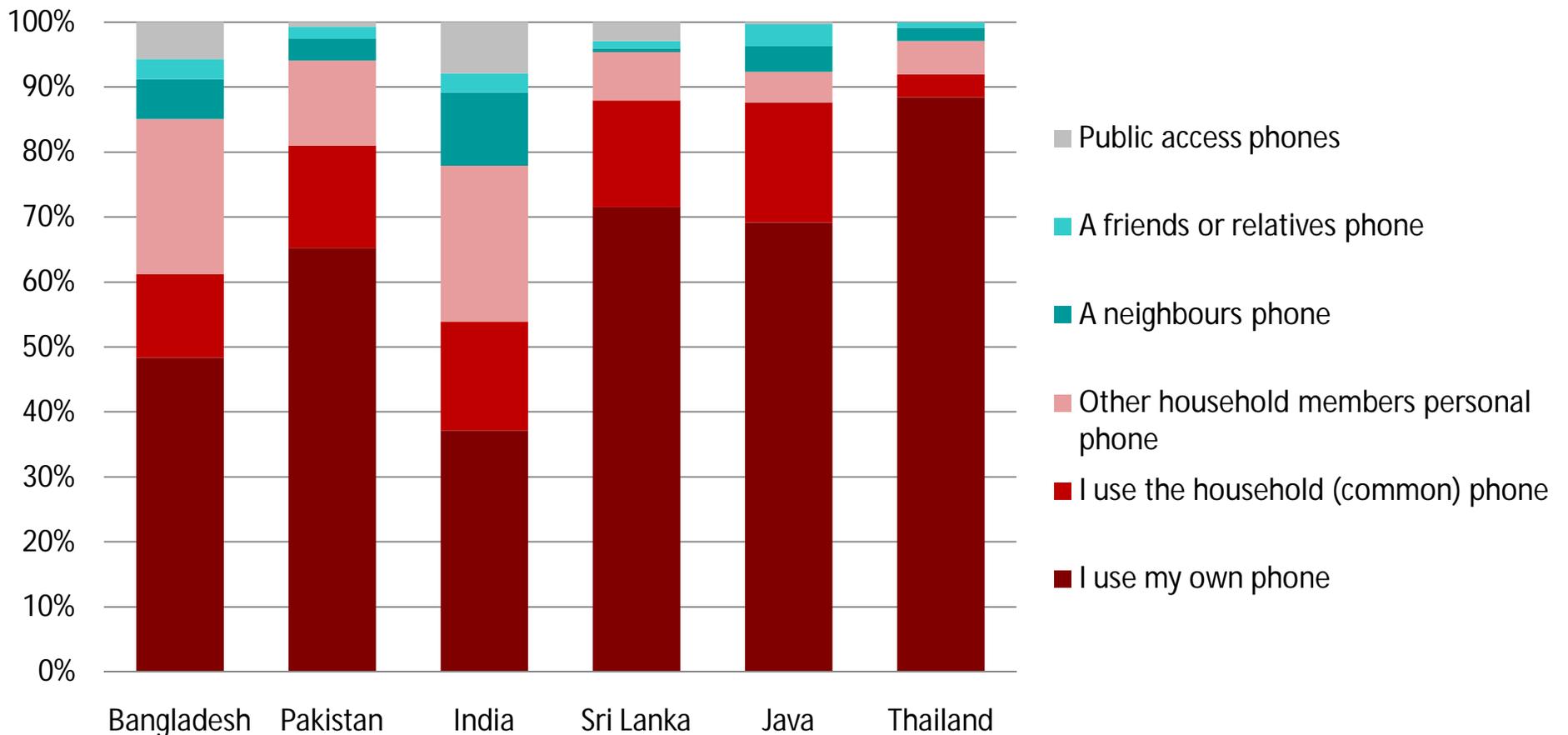
# Urban vs rural: Urban BOP call more regularly, except LK & Java (marginally)

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



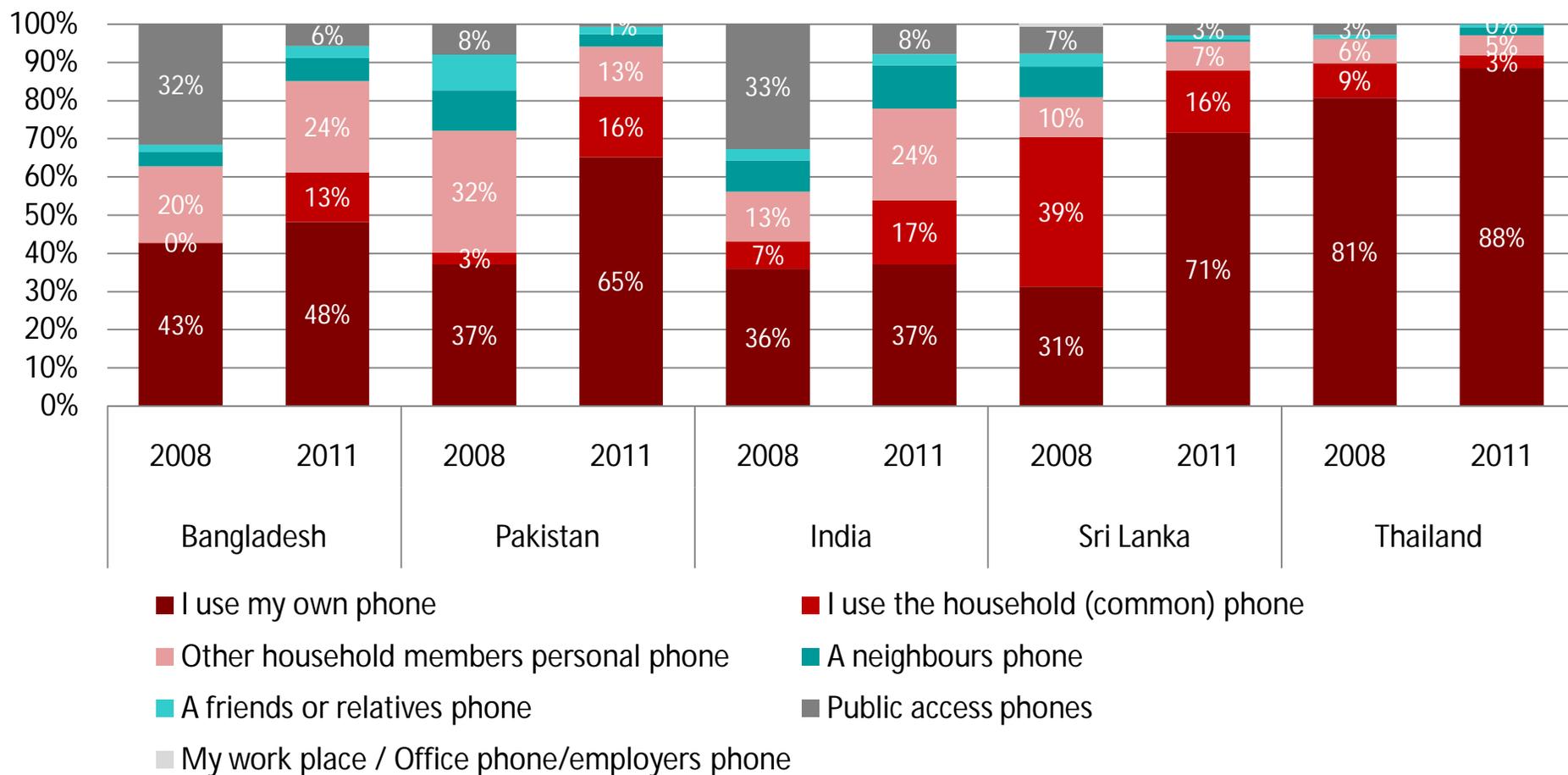
# > 75 % of BOP have access within the household

Most frequently used phone (% of BOP teleusers)



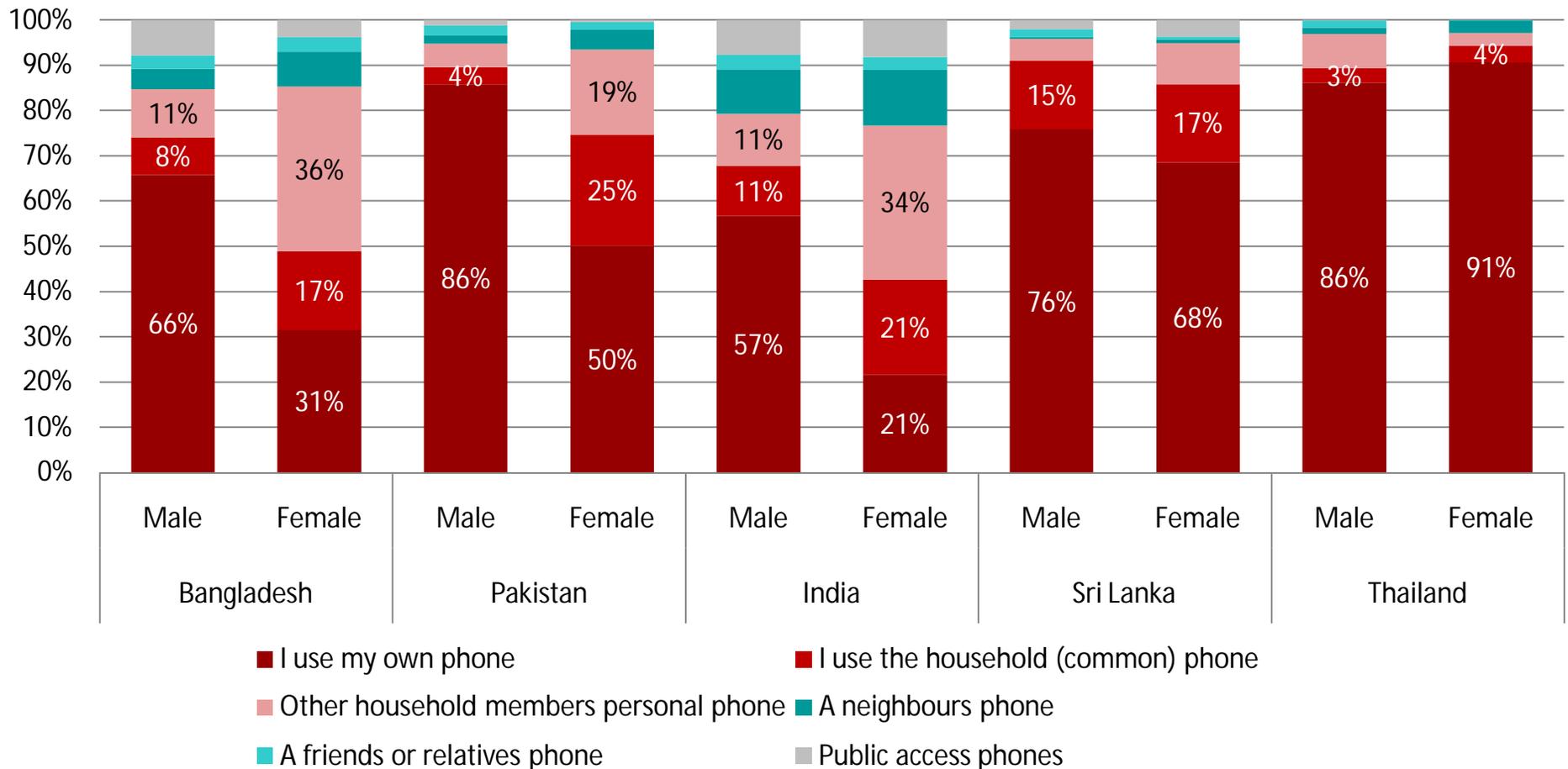
# 2008 vs 2011: Fall in public phone and increase in household/personal access at BOP

Most frequently used phone (% of BOP teleusers)



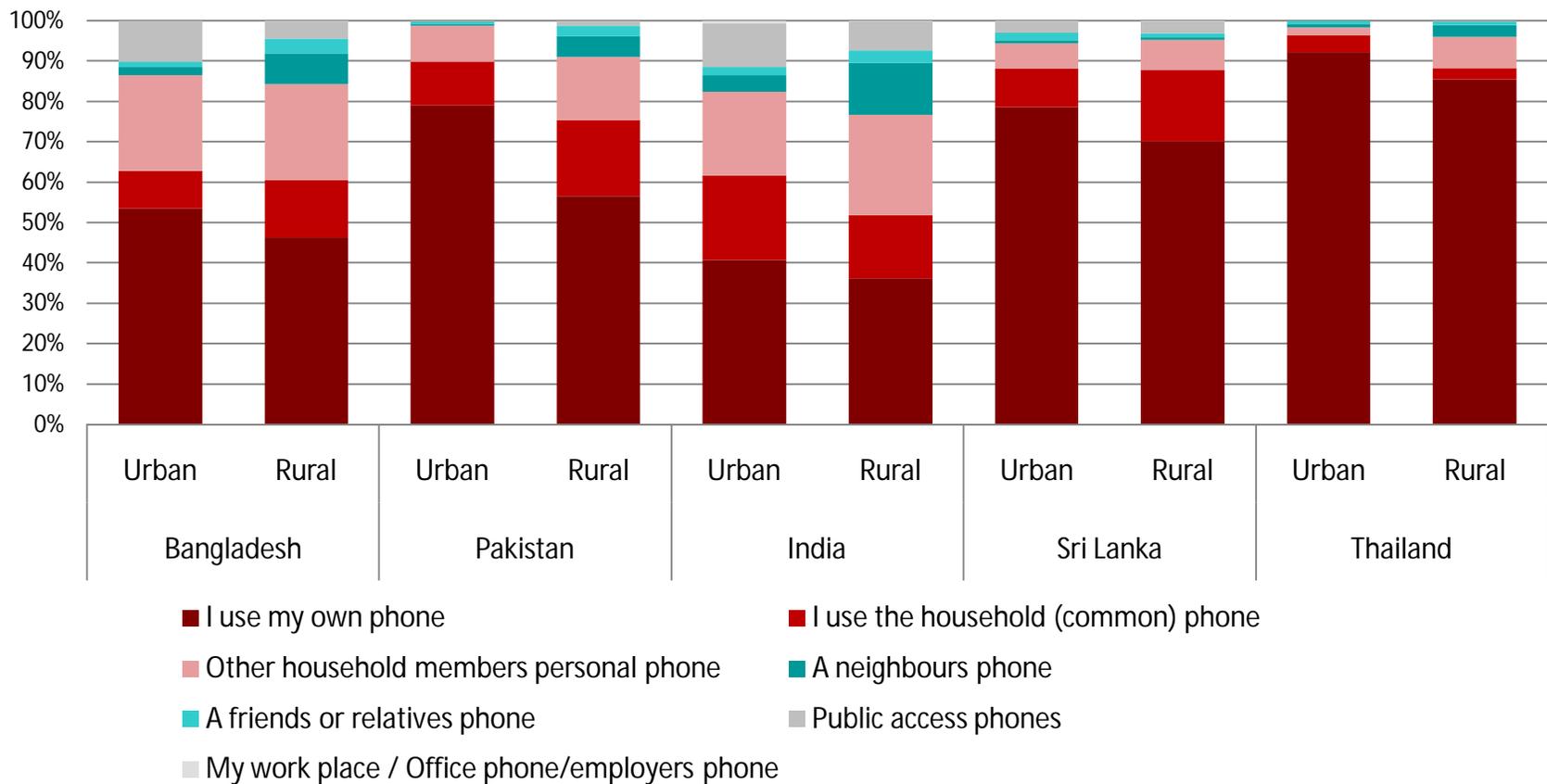
# Male vs female: Greater dependence by BOP females on household phones & others' phones within household, except in TH

Most frequently used phone (% of BOP teleusers)



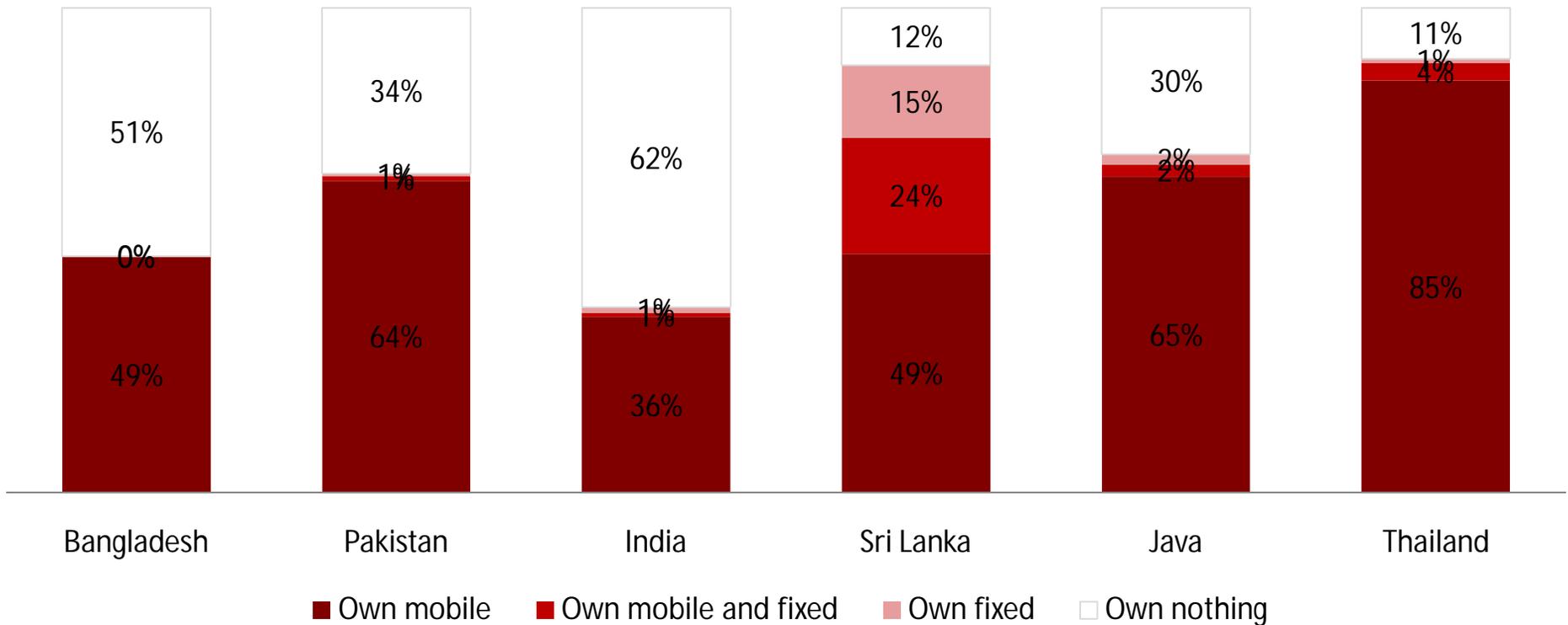
# Urban vs rural: Greater reliance on other peoples' phones in rural BOP

Most frequently used phone (% of BOP teleusers)



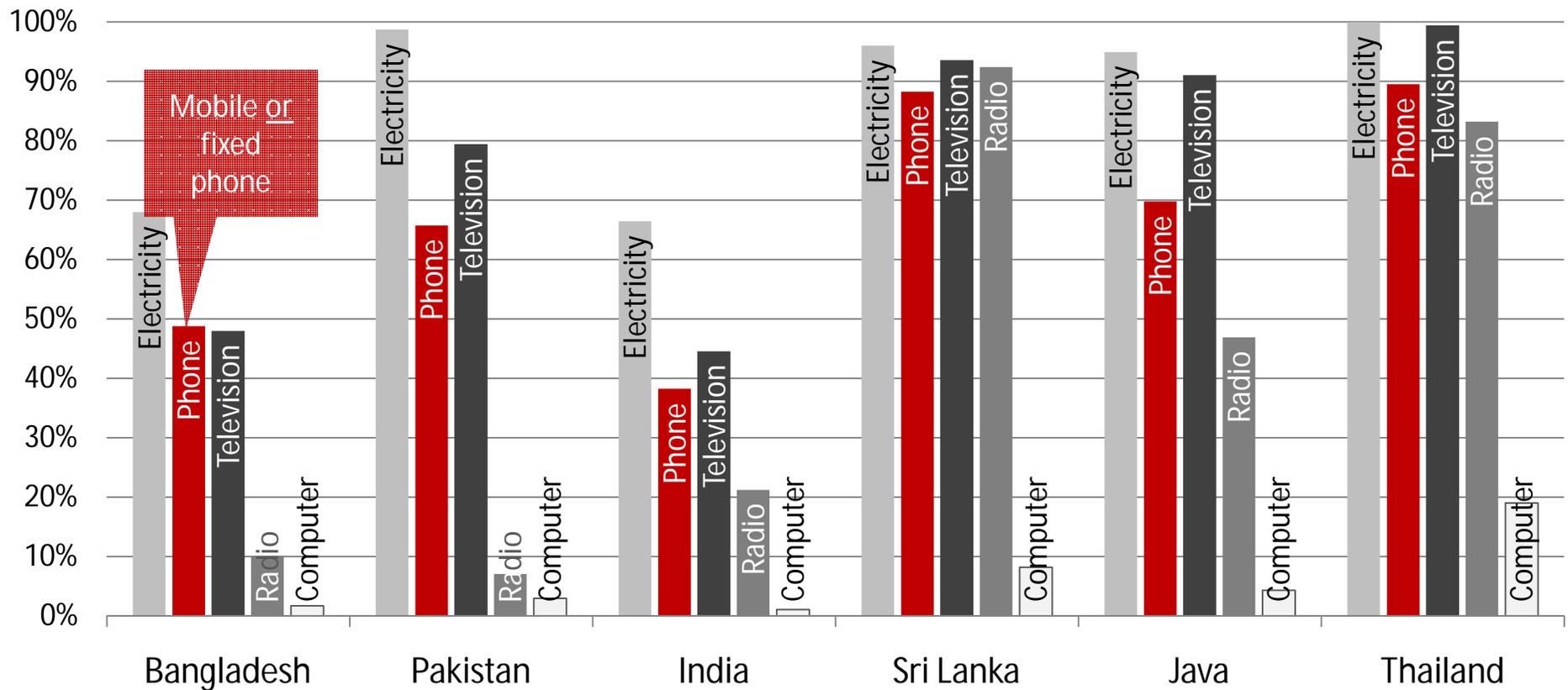
# Mobile dominates; "Fixed" phones popular only at LK BOP

Household phone ownership (%of BOP teleusers' households)



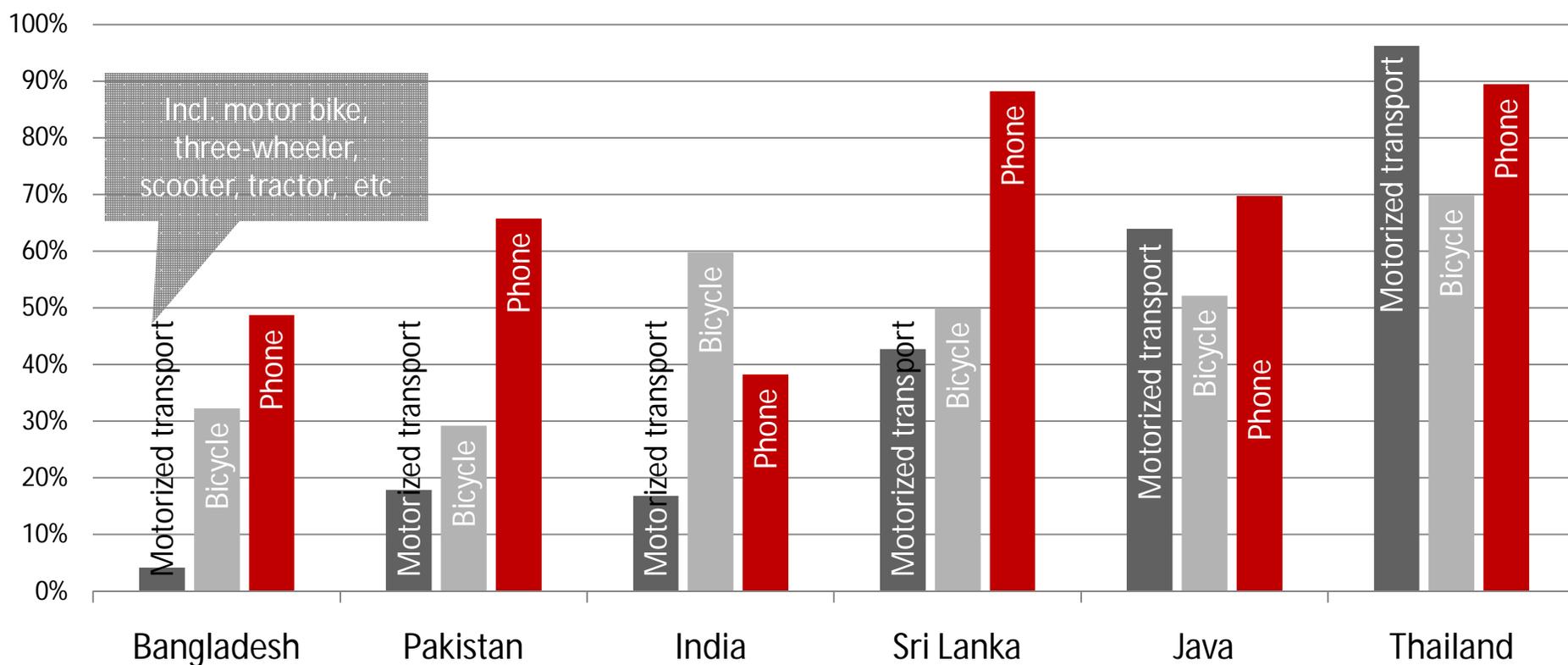
# Phones have overtaken radio at BOP everywhere except LK (but some mobiles are used as radios)

Household access (% of BOP teleusers)

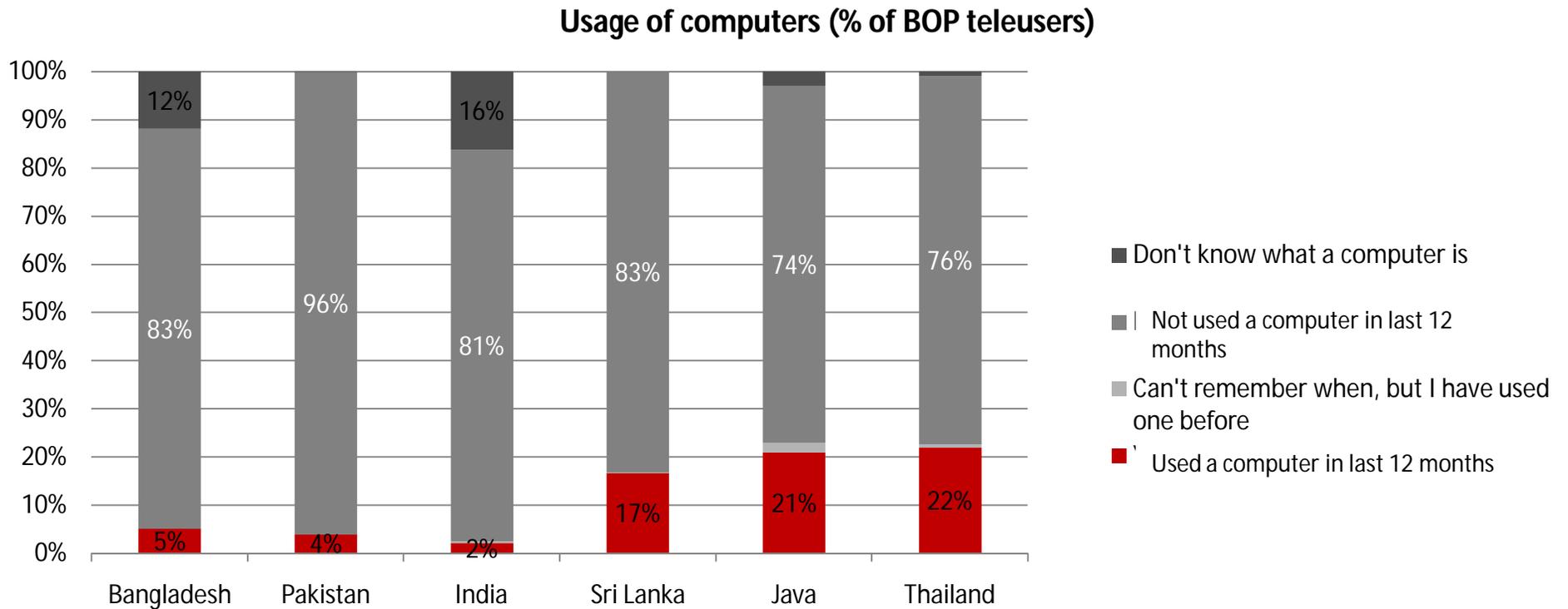


# Access to household phones greater than to motorized transport at BOP, other than in TH

Household access to phones vs transport (% of BOP teleusers)

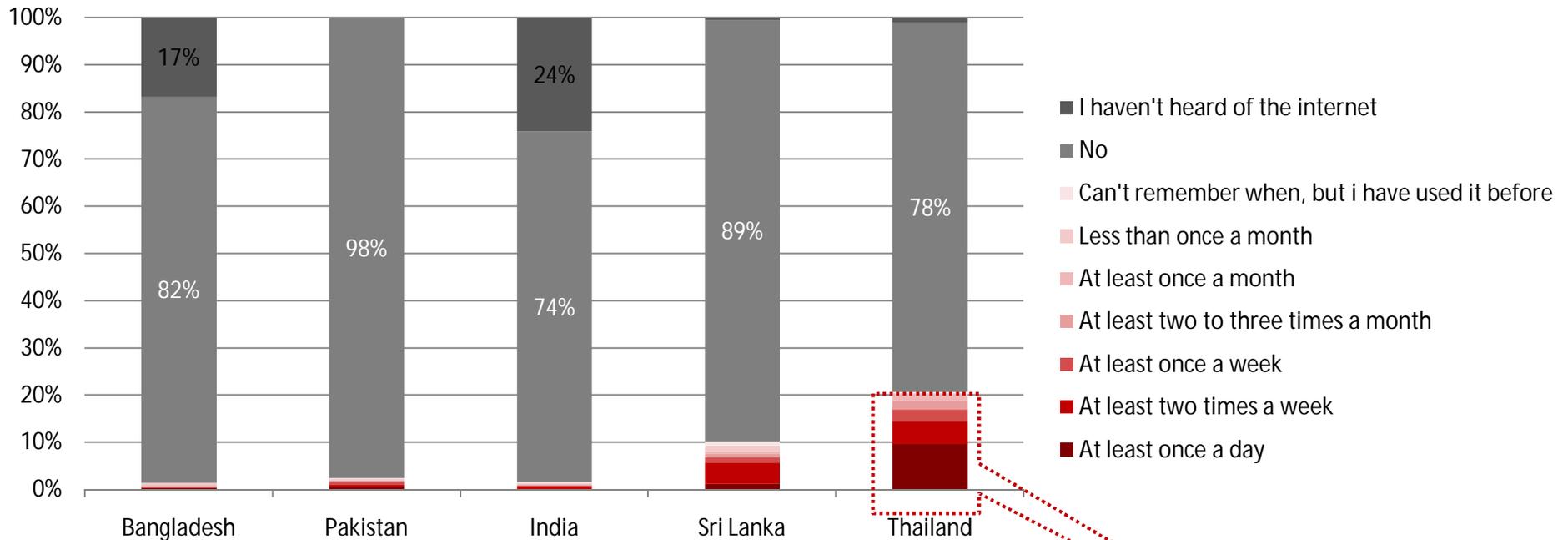


# Computer use at BOP low overall



# Internet use at BOP similarly low; sig. lack of awareness at BD & IN BOP

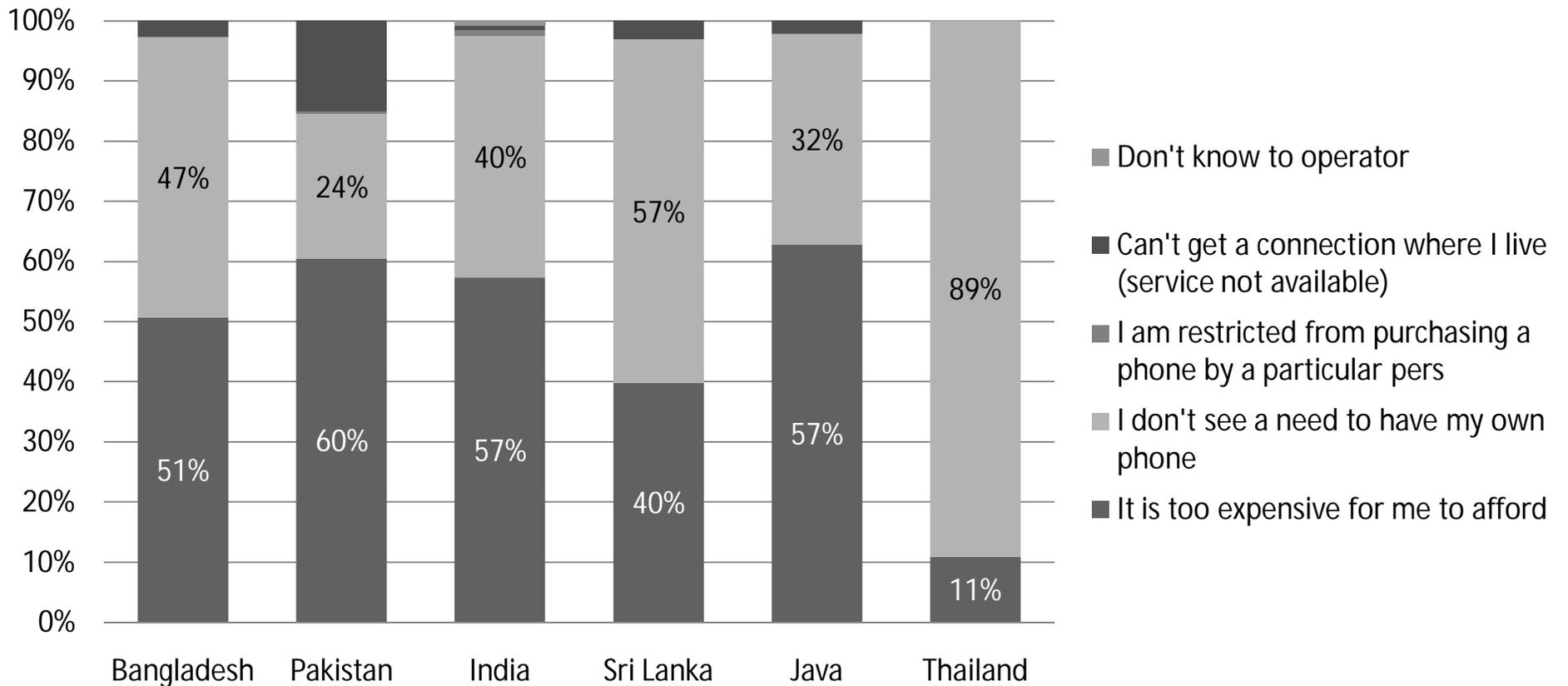
Internet use (% of BOP teleusers)



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

# Non-phone owners with no need for a phone increasing

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

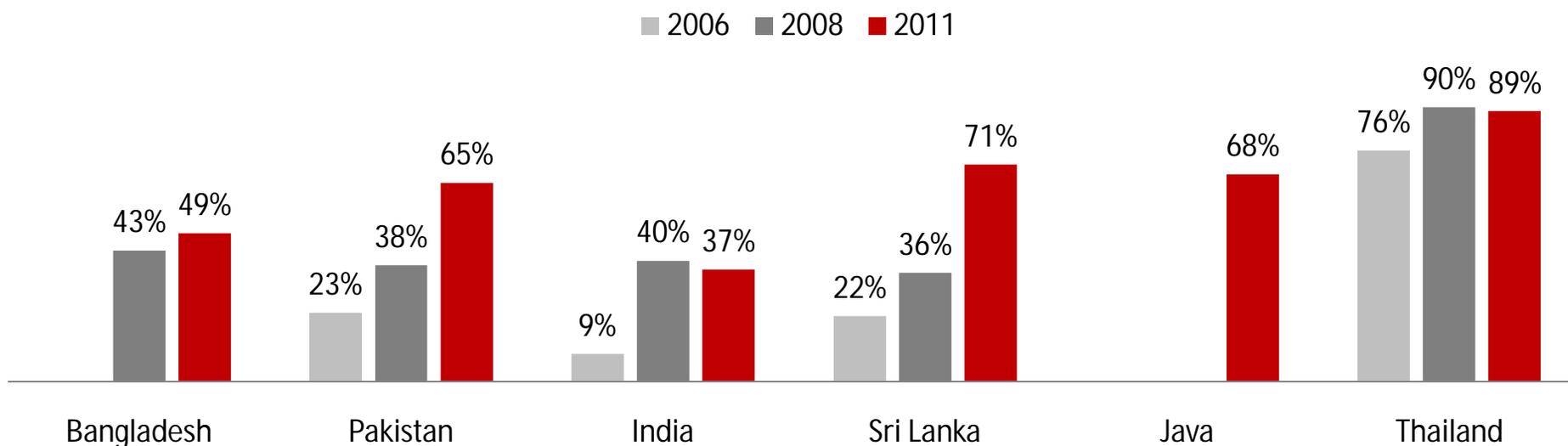


Findings

# **MOBILE OWNERSHIP AND USE**

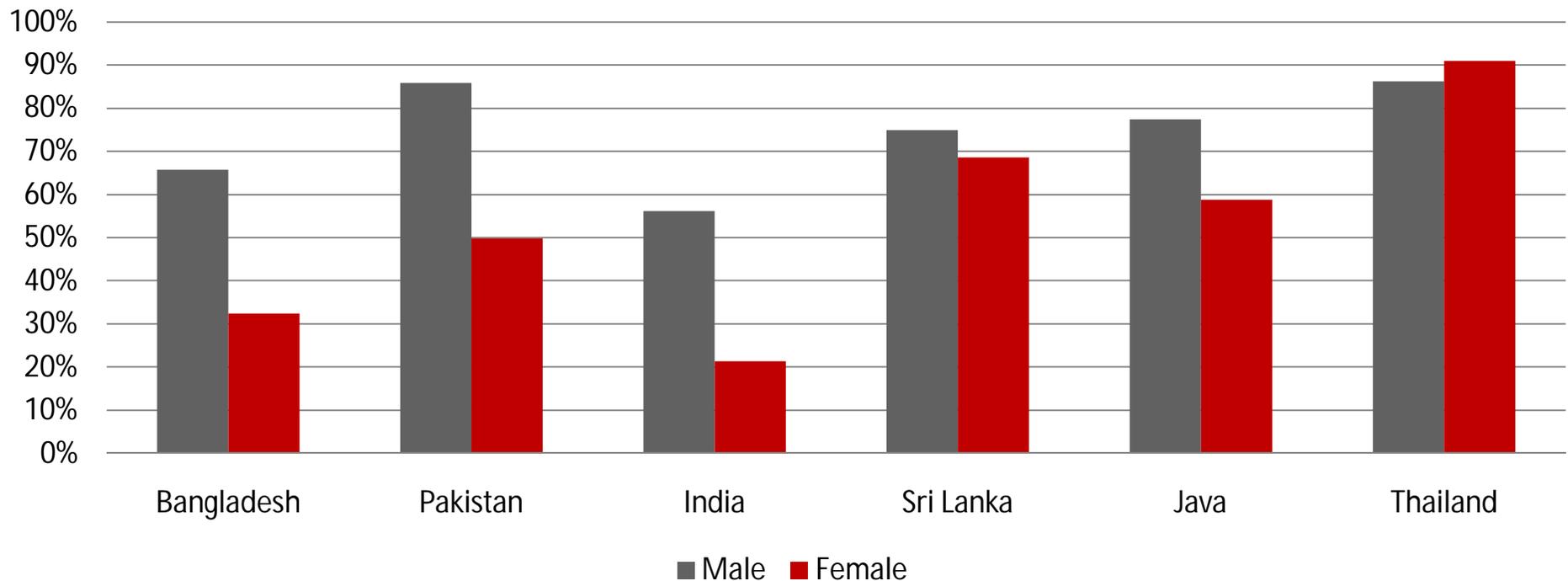
# Significant increases in BOP mobile ownership in Sri Lanka and Pakistan

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



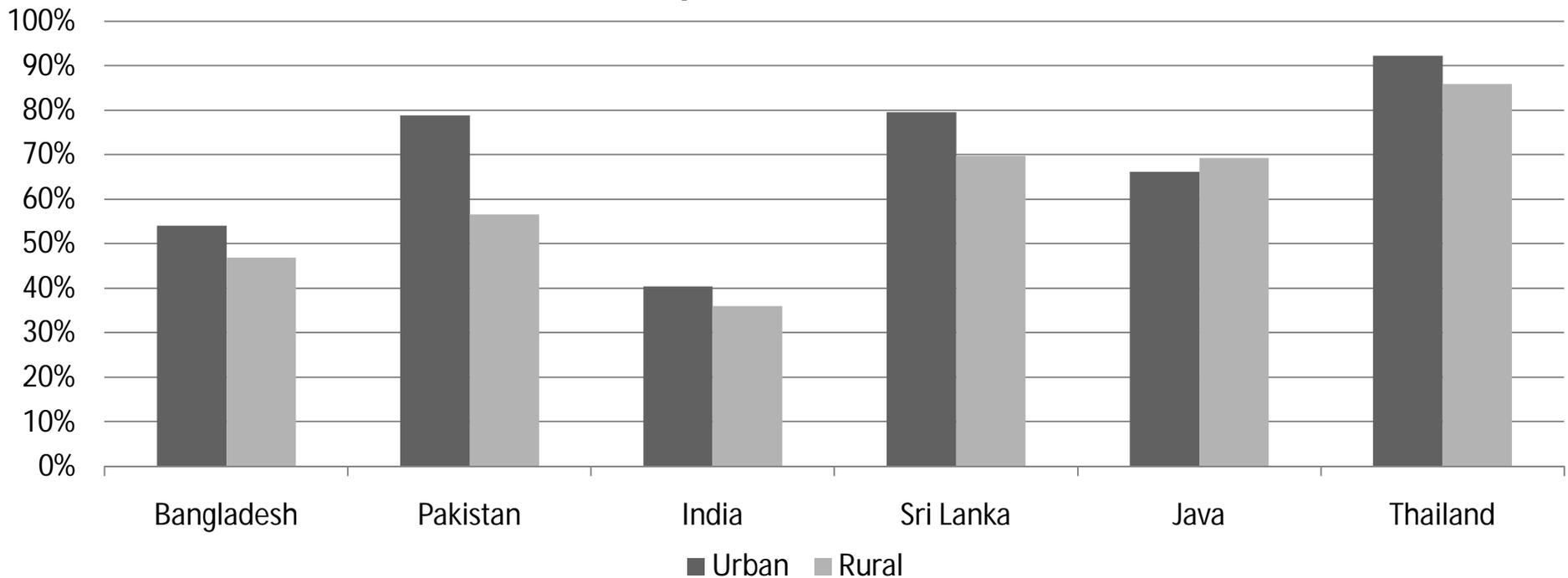
# Male vs female: Gender gap continues in BOP mobile ownership in sub-continent. Flipped in TH

Mobile ownership - individual (% of BOP teleusers)



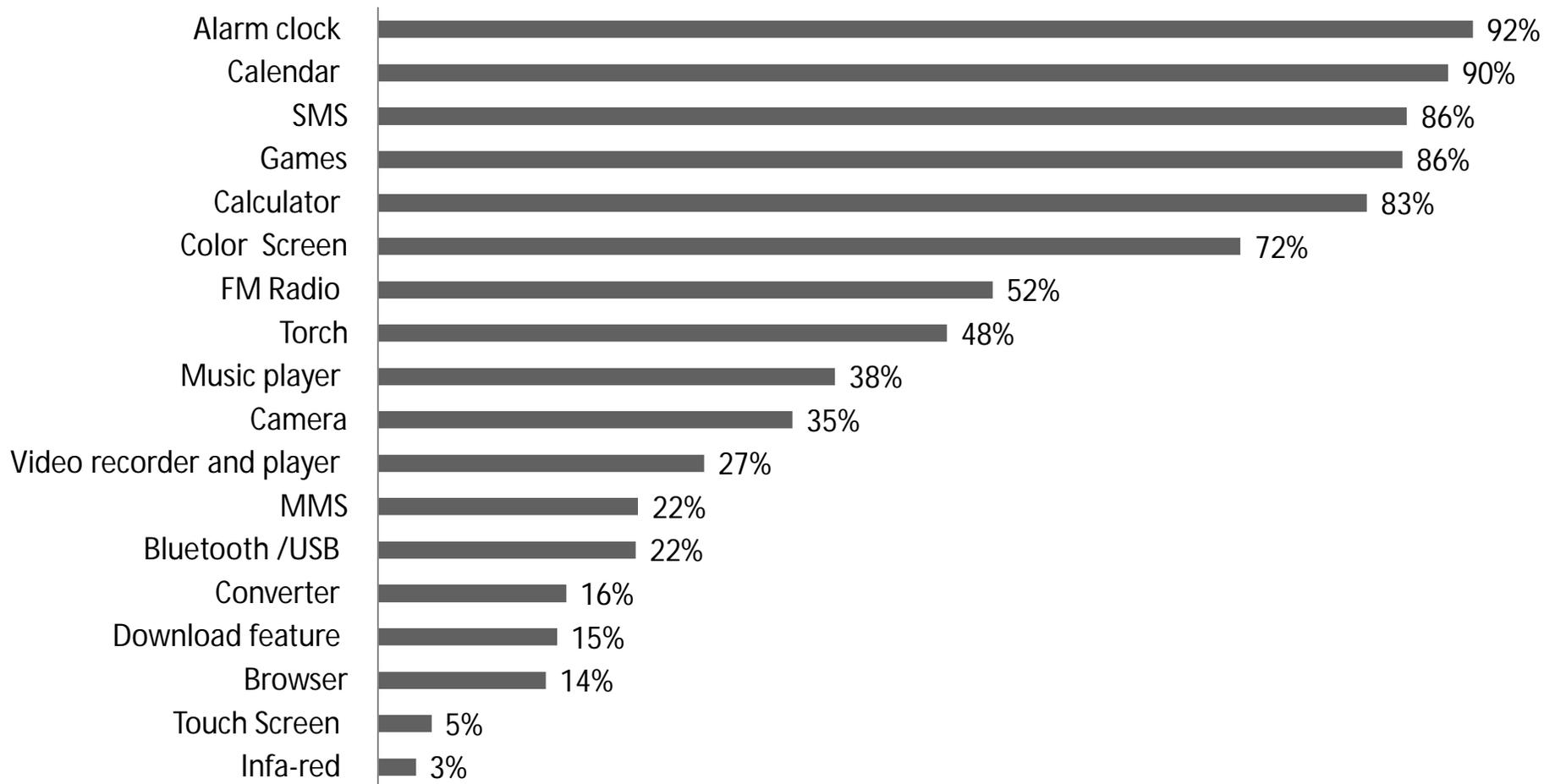
# Urban vs rural BOP: Urban mobile ownership higher than rural except in Java

Mobile ownership - individual (% BOP teleusers)



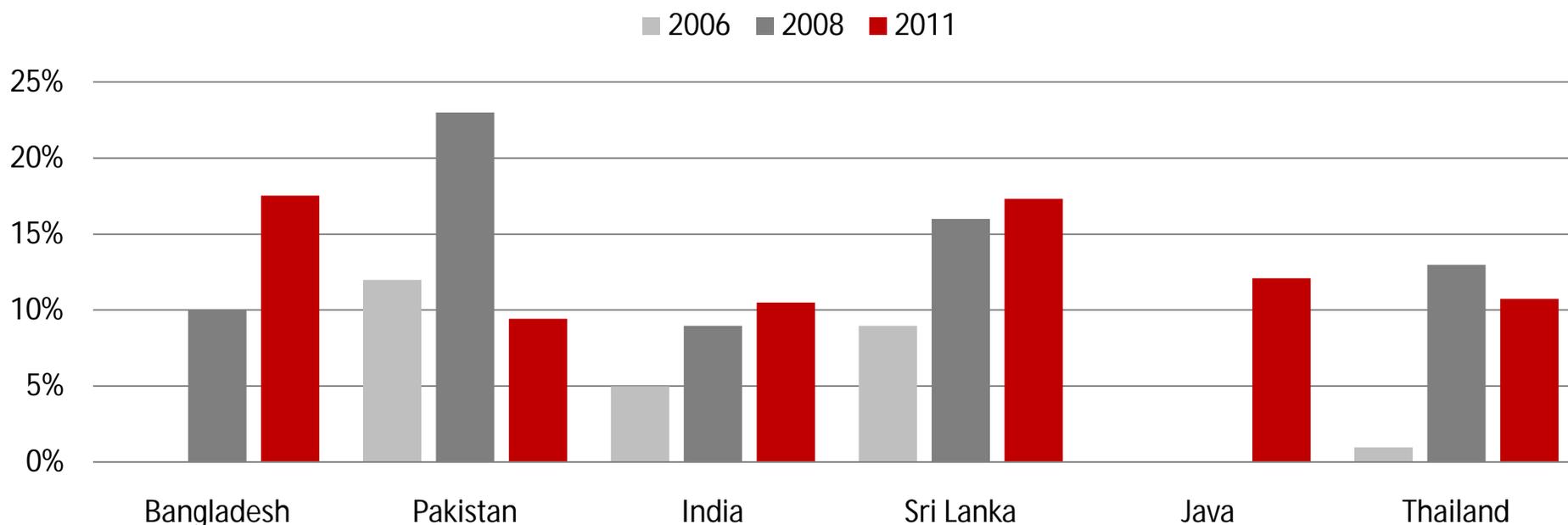
# Most BOP phones have radio; 14% have a browser & 5% touch screen (perceived)

Features present on mobile handset (% of BOP mobile owners; all countries except Java)



# 2006-2011: Dramatic drop in multiple SIM ownership at PK BOP; Sig. increase at BD BOP

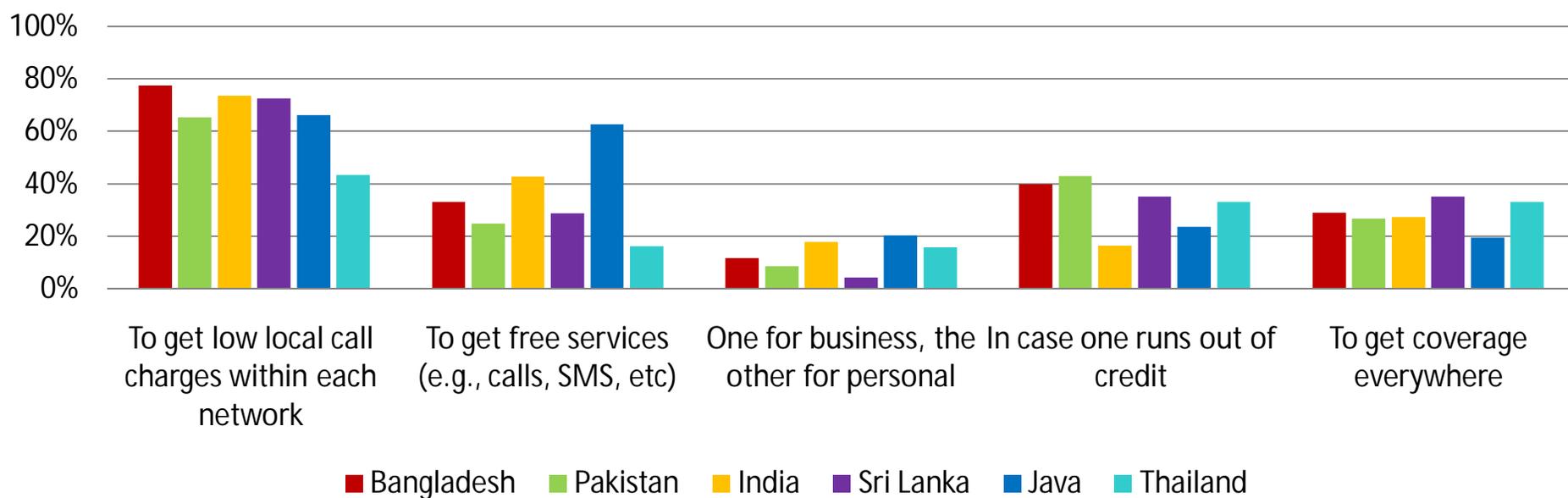
Multiple SIM ownership (% of BOP mobile owners)



- Multiple SIM ownership higher among males than females

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

Reason for multiple SIM ownership (% BOP MSOs)



# Most BOP owners have one handset currently, but are on their second (except in Java)

	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 at BOP

Among BOP mobile owners

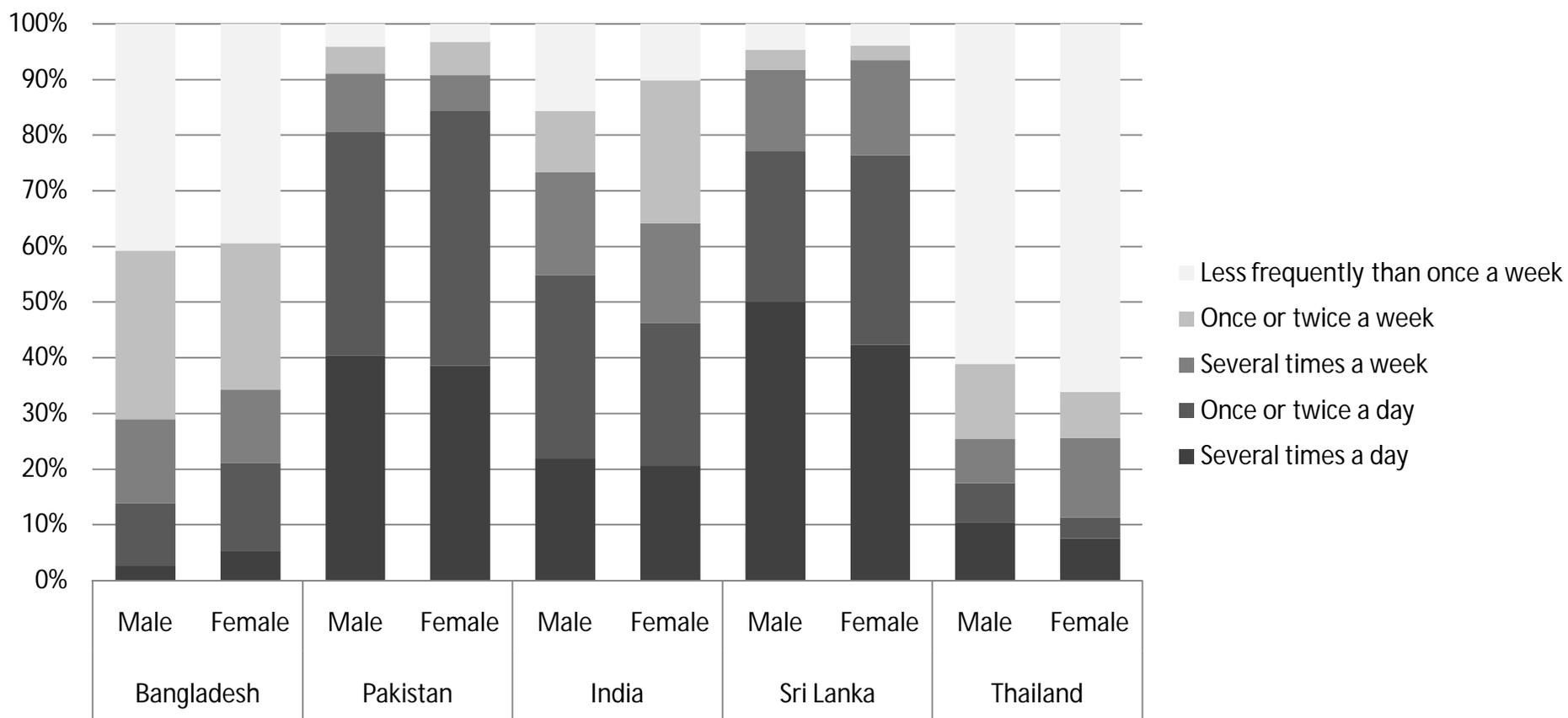
	% of BOP mobile owners					
	B'desh	Pakistan	India	S'Lanka	Java	Thailand
Make phone calls	100	99	100	99	96	100
Receive phone calls	100	95	99	100	94	99
Send/receive missed calls	86	71	78	65	54	24
Send/receive SMS	19	38	23	55	89	37
Send/receive MMS	1	2	3	5	14	8
Send/receive e-mail				1	3	2
Browse the Internet	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

# What they did in 2008

	% of BOP mobile owners				
	Bangladesh	Pakistan	India	Sri Lanka	Thailand
Taking phone calls	100	100	99	100	100
Receiving phone calls	100	100	98	100	100
Sending/receiving missed calls / beeps/ flashes / ring-cuts	94	84	84	73	39
Sending/receiving SMS	32	47	33	52	53
Sending/receiving MMS	1	4	4	6	4
Sending/receiving emails	0	0	1	0	1
Browsing the Internet	0	1	1	2	2
Taking photos /video clips	4	2	1	8	18
To play games by myself	13	18	7	21	17
To listen to the radio	0	7	3	12	22
To listen to music	4	5	3	7	22
To share content that you have created	1	2	2	6	3
To send or receive or download or upload other content	0	2	3	8	9
As an organizer	1	7	8	4	14
To check my bill / credit balance	11	40	25	50	39
Sending/receiving talk-time/load	8	35	7	3	6

# Male vs female: No big difference in SMS use frequency amongst those who text at BOP

SMS frequency (% mobile owners who use SMS)



# Top reasons for not using SMS: Don't know what it is; it's too confusing; too difficult to type

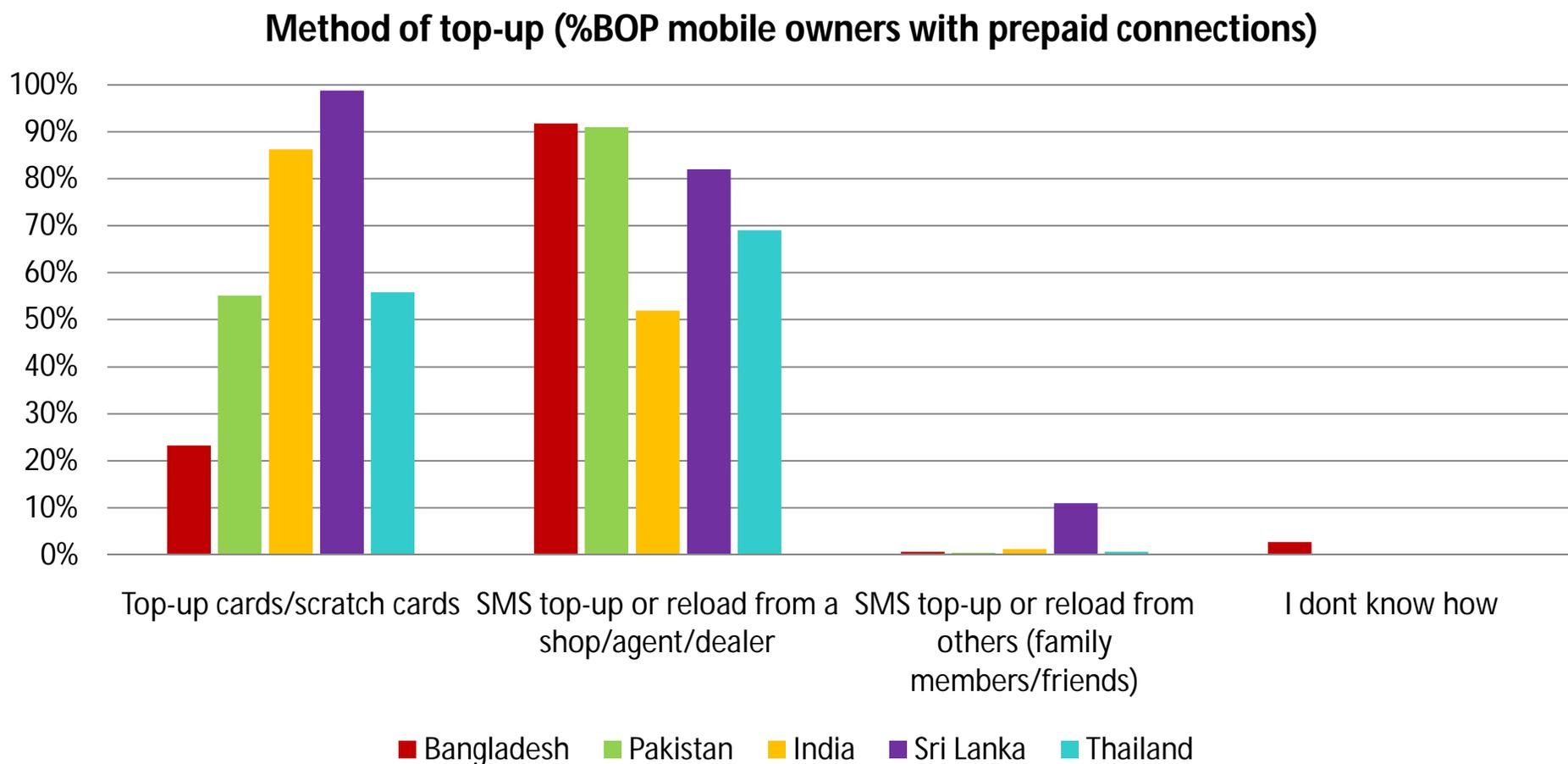
	Bangladesh	Pakistan	India	Sri Lanka	Thailand
I don't know what it is	54	11	61	14	3
Using SMS is too confusing to me	41	50	42	50	20
It is too difficult for me to go through menu and open it	6	20	25	17	8
It is too difficult for me to type	10	31	34	33	33
It is too expensive for me	3	5	8	4	13
It takes too 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

# Postpaid at BOP only in Sri Lanka and Thailand

## Primary mobile connection (% BOP mobile owners)

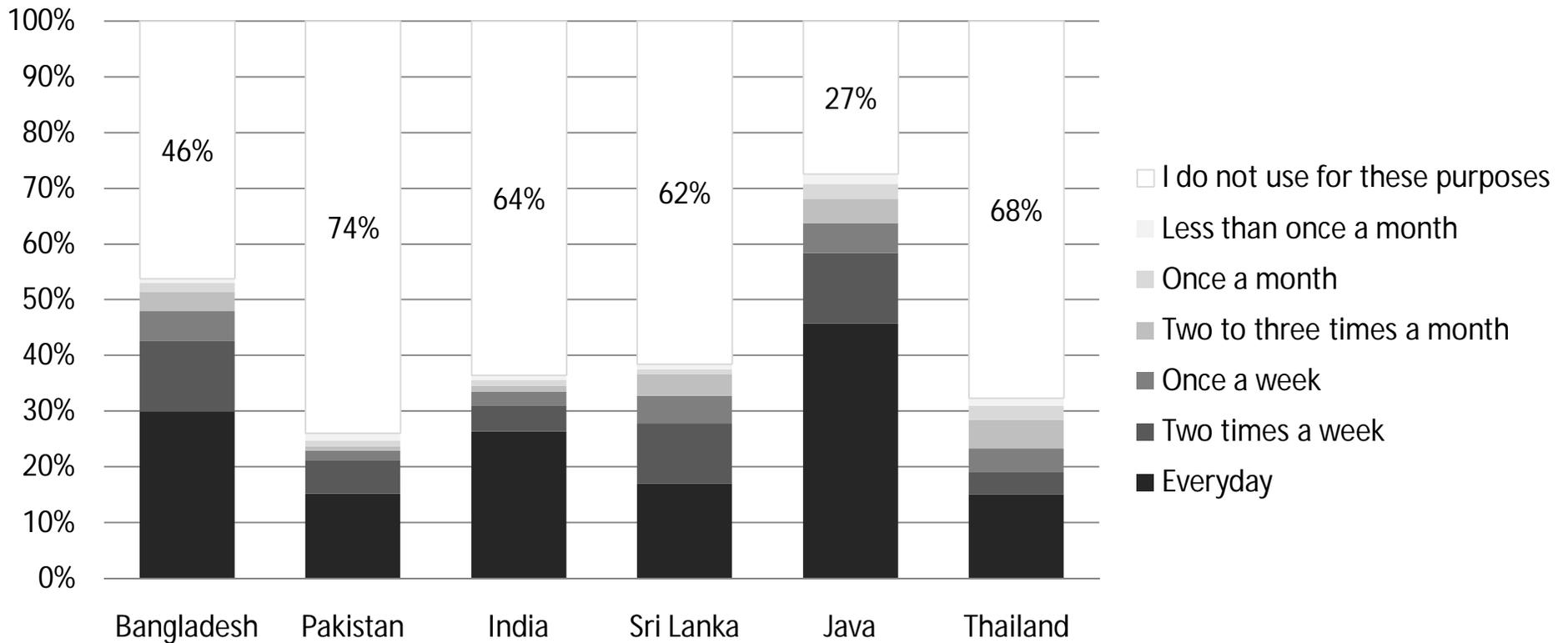
	Bangladesh	Pakistan	India	Sri Lanka	Java	Thailand
Pre paid	100	100	100	95	100	96
Post paid	-	-	-	5	-	4

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



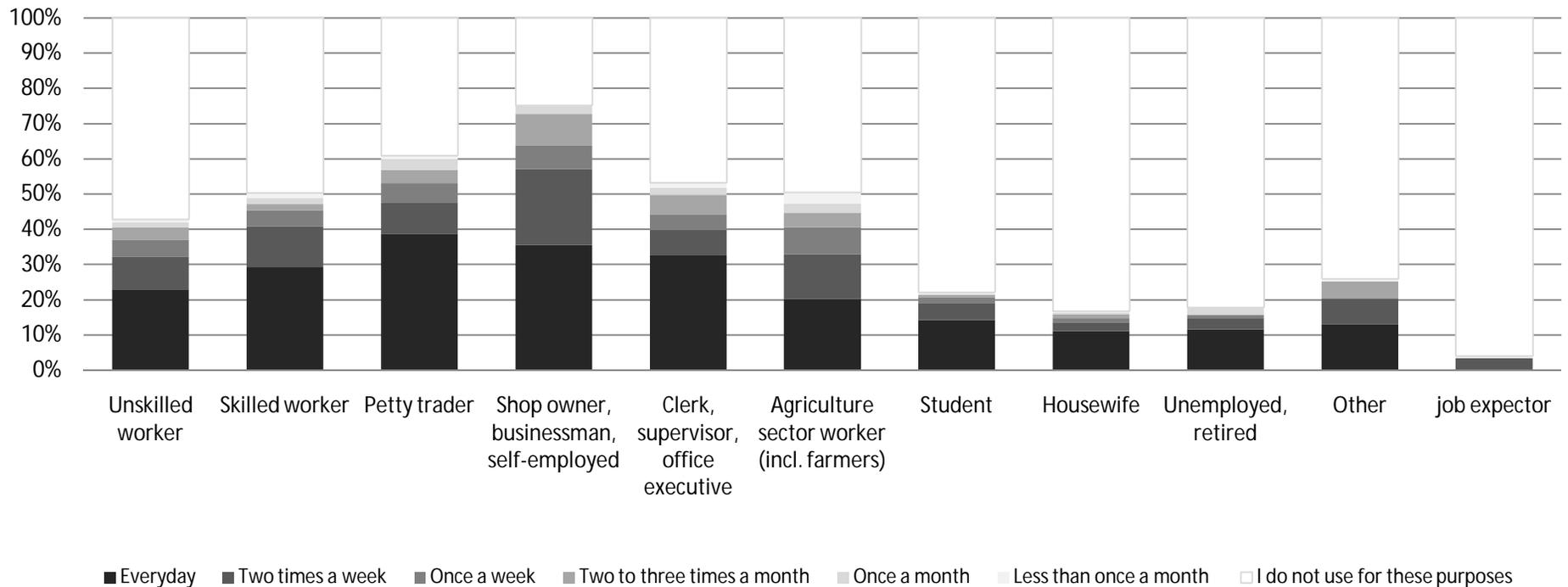
# Majority at BOP don't use mobiles for financial, business or work communication, except in Java

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



# Business people and petty traders are heaviest business users at BOP

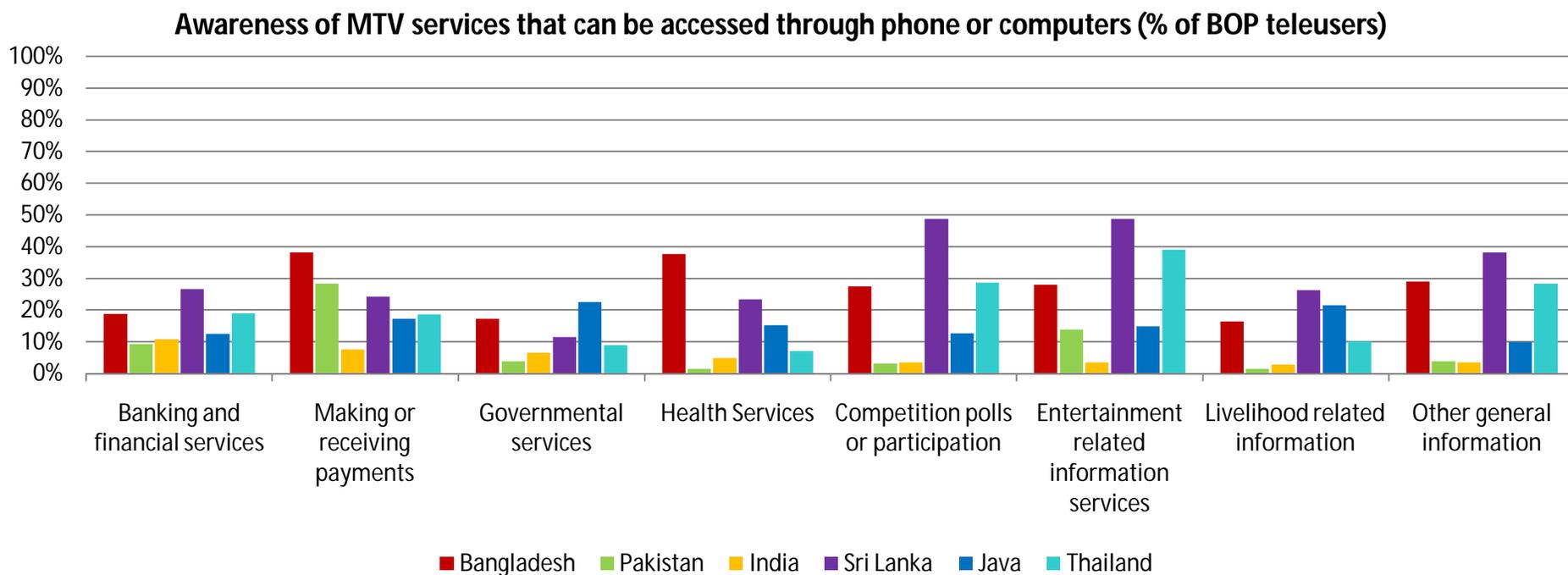
Use of the phone for financial, business or work-related purposes (% of BOP teleusers)



Findings

# **MORE-THAN-VOICE**

# Awareness of entertainment & competition polls at BOP highest in Sri Lanka

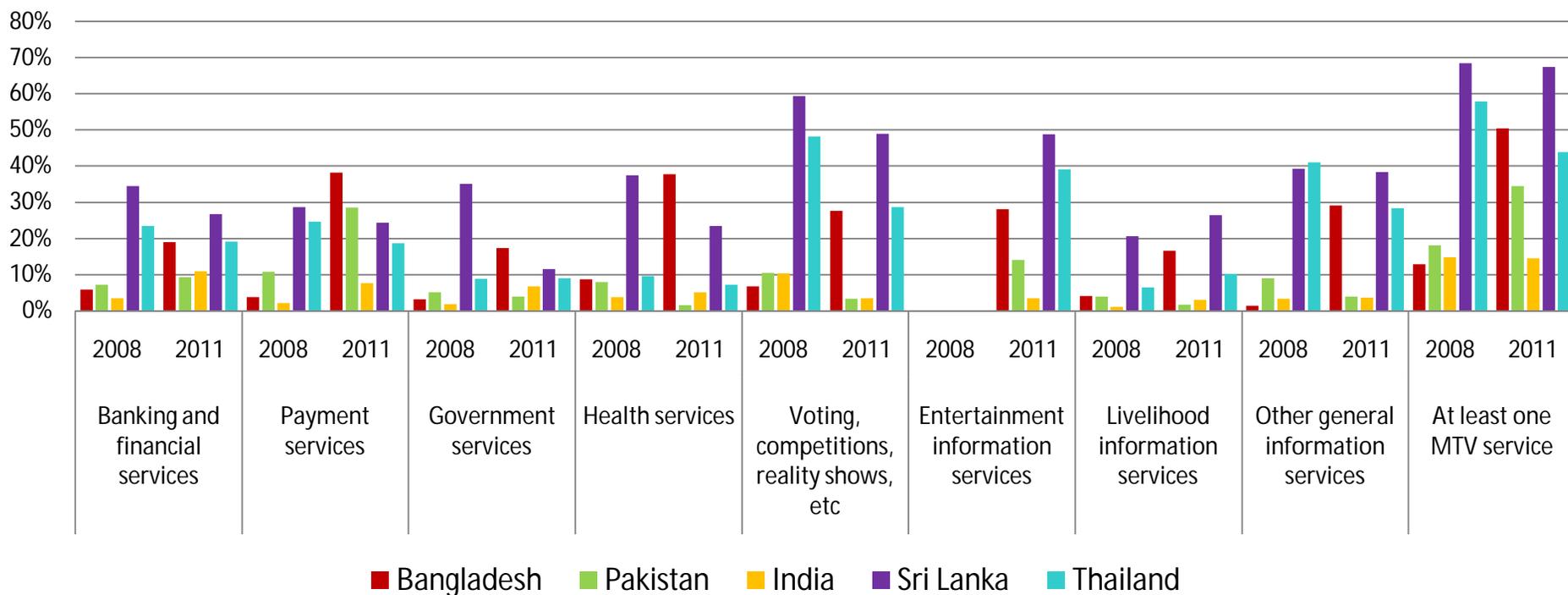


Among BOP teleusers

# 2008 vs 2011: Awareness of some MTV services has declined in some countries

2008 vs 2011

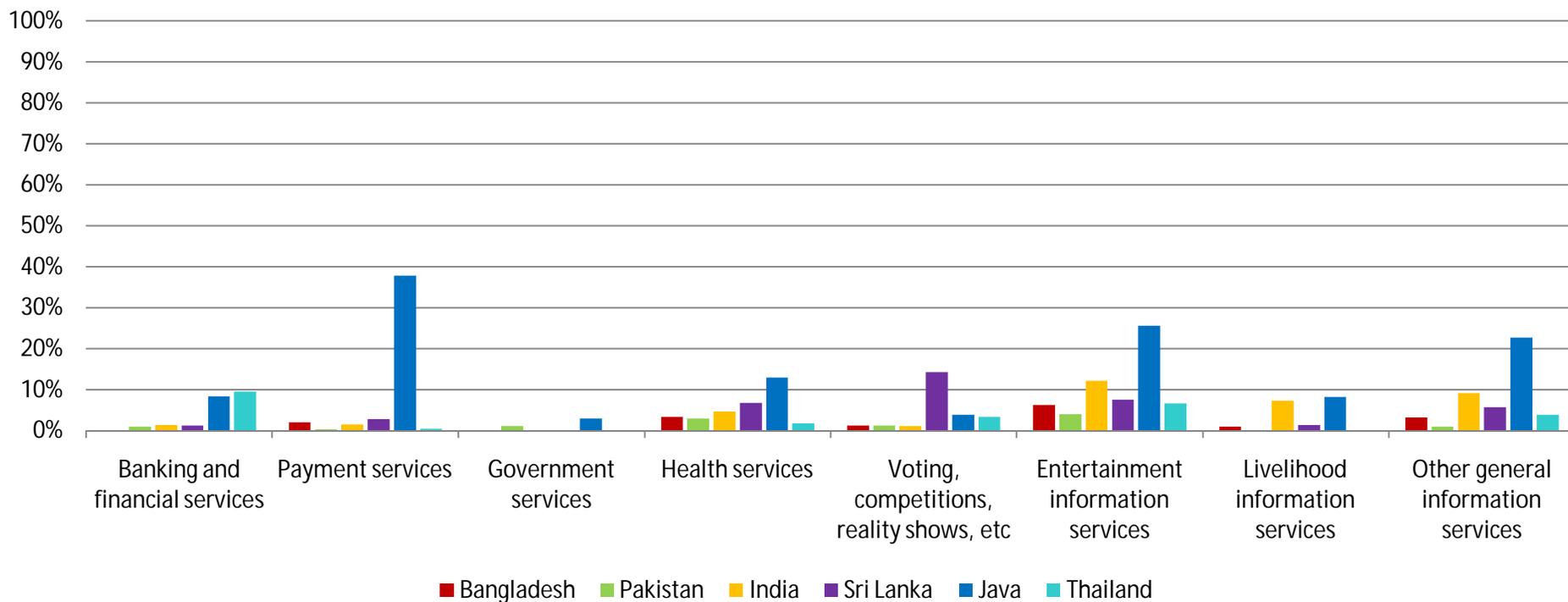
Awareness of MTV services available on phones and computers (% of BOP teleusers)



Among BOP teleusers

# BOP is not taking up MTV services

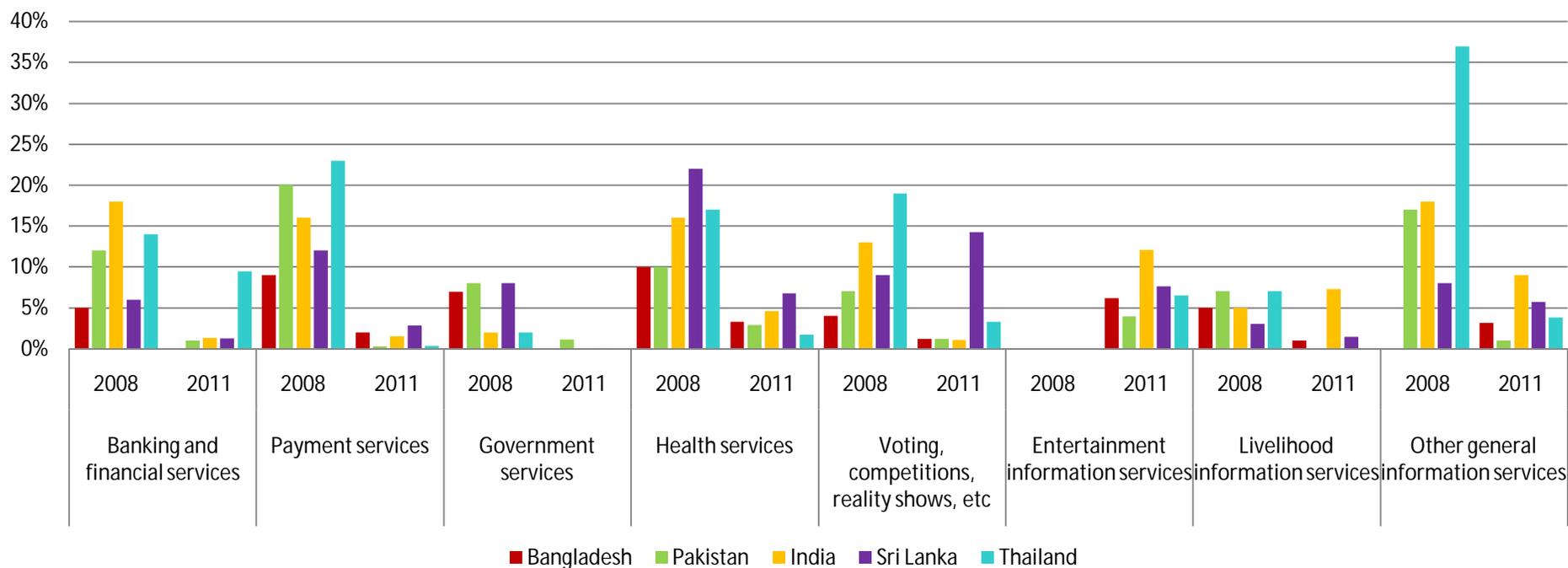
MTV service usage through phone or computer (% BOP aware of services)



Among BOP who are aware of MTV services

# 2008 vs 2011: MTV usage at BOP has fallen

More-than-voice usage, 2008 vs 2011 (% of BOP teleusers who are aware of those services)



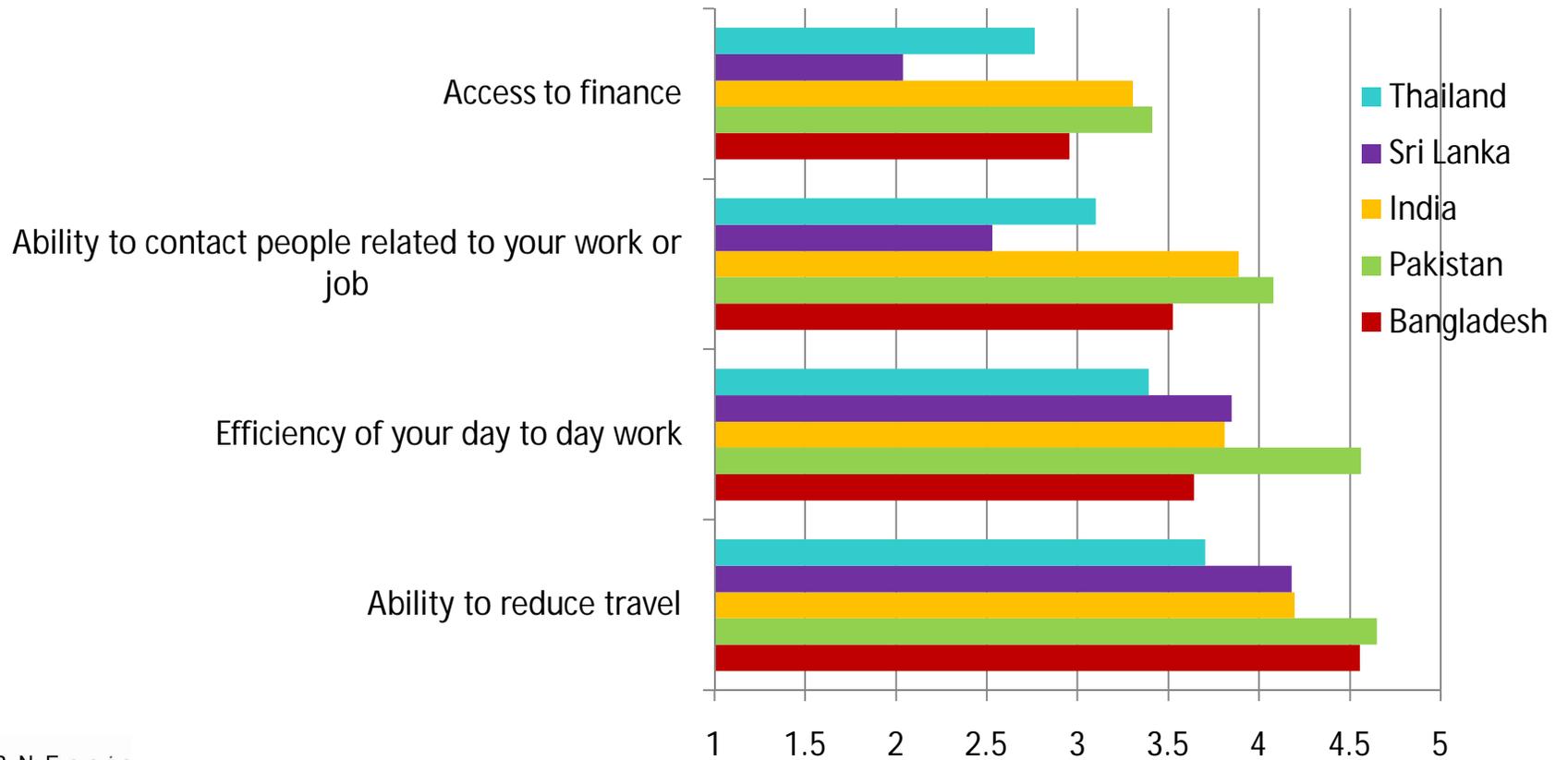
Among BOP teleusers who are aware of MTV services

Findings

# **PERCEIVED BENEFITS**

# Main economic benefit of phone is reducing travel

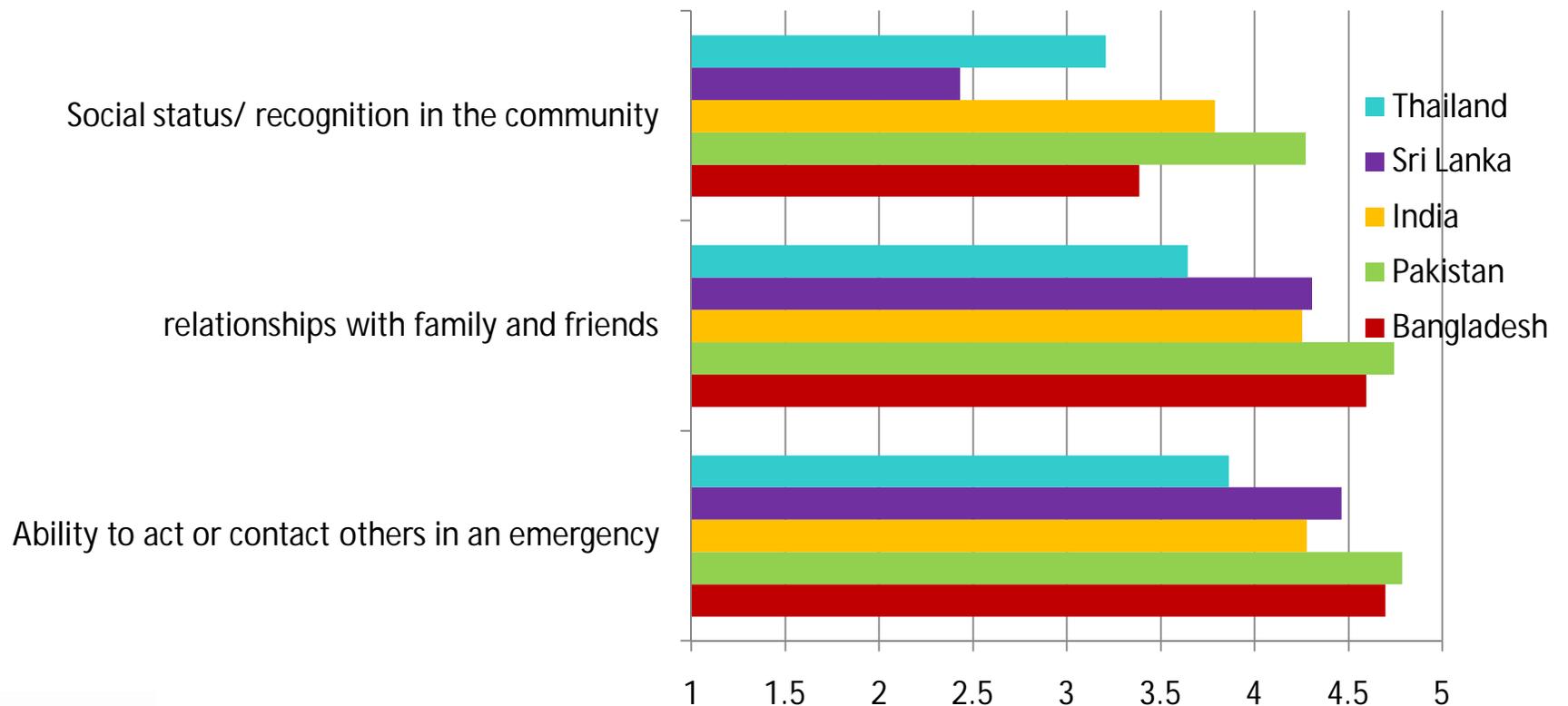
Benefits of phones (%BOP teleuser)  
1=No change 5=Improved greatly



Among BOP teleusers

# The phone mainly benefits personal life

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

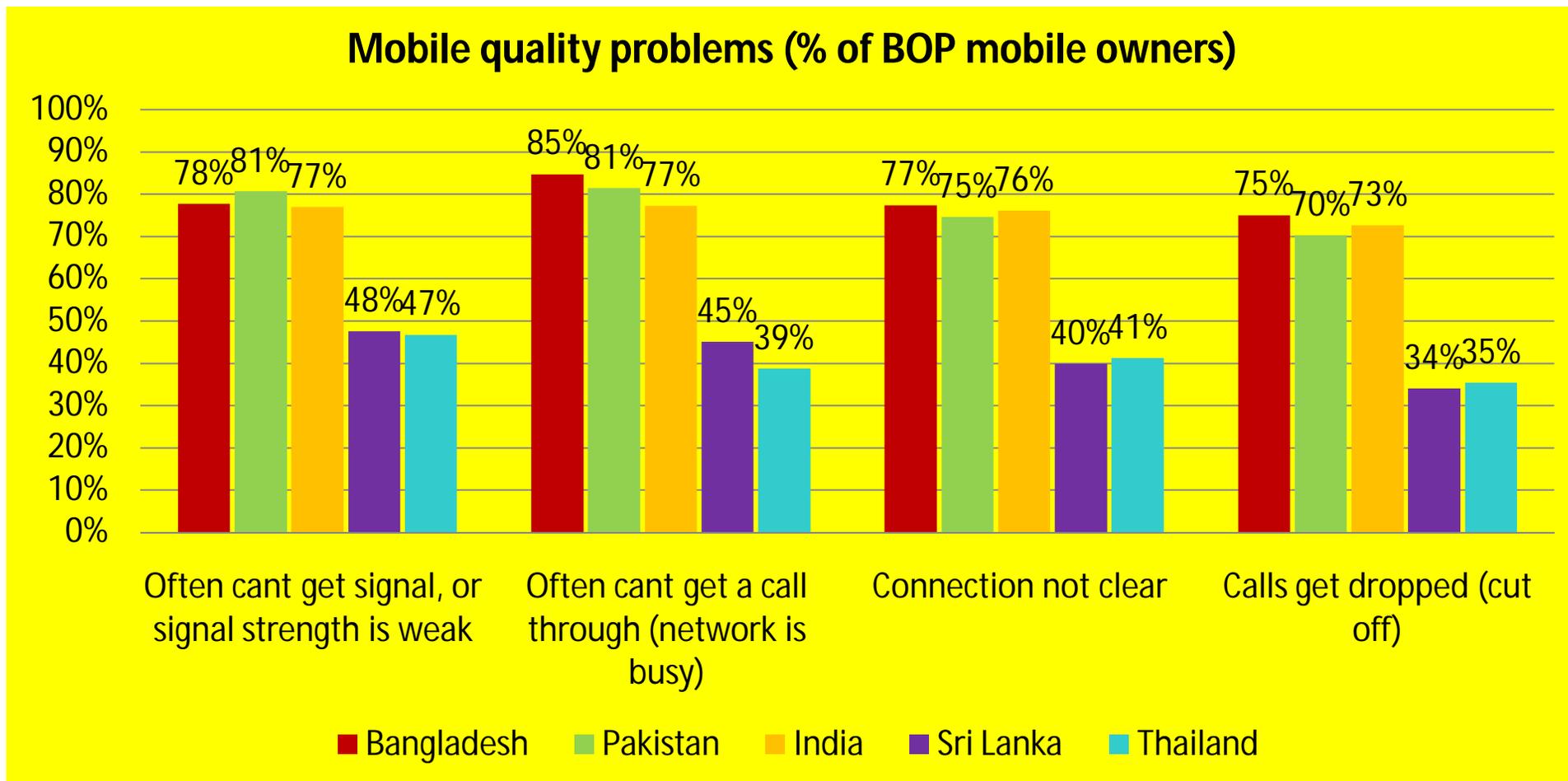


Among BOP teleusers

Findings

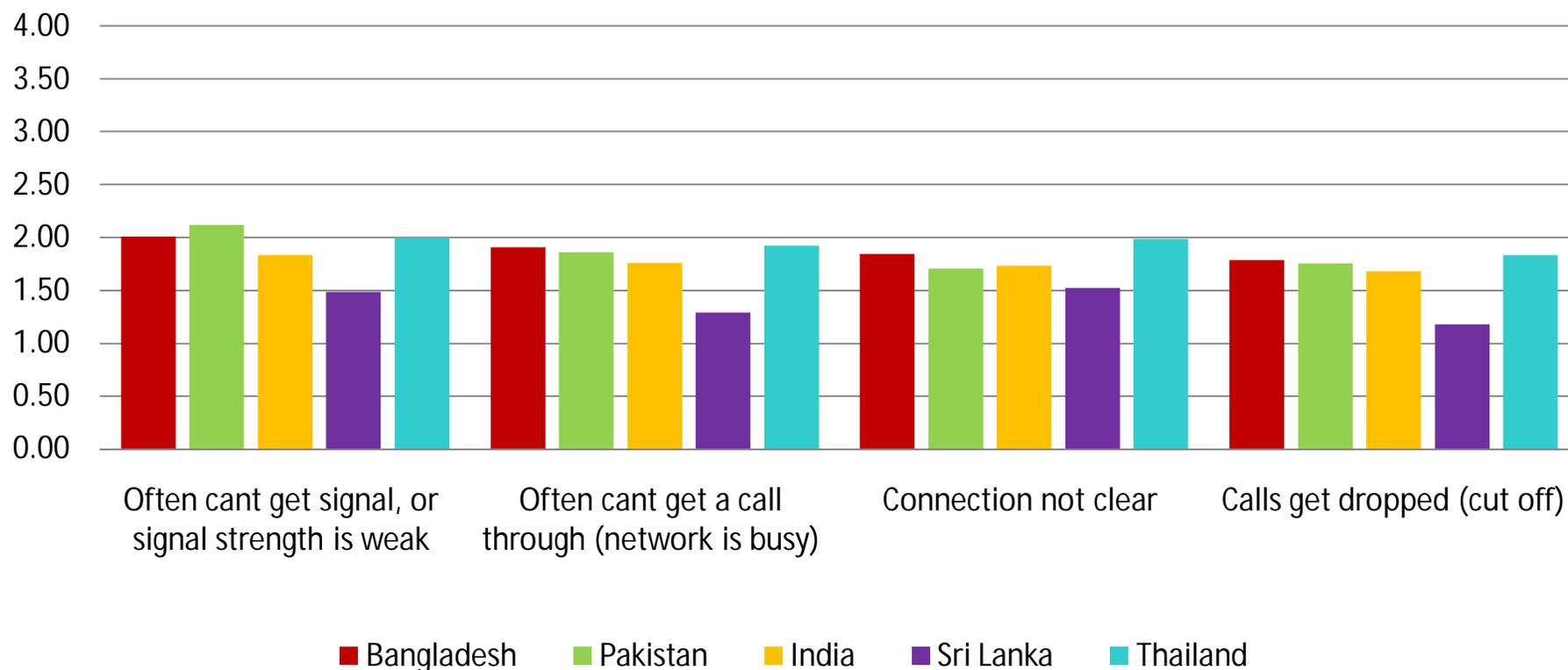
# **QUALITY OF SERVICE**

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

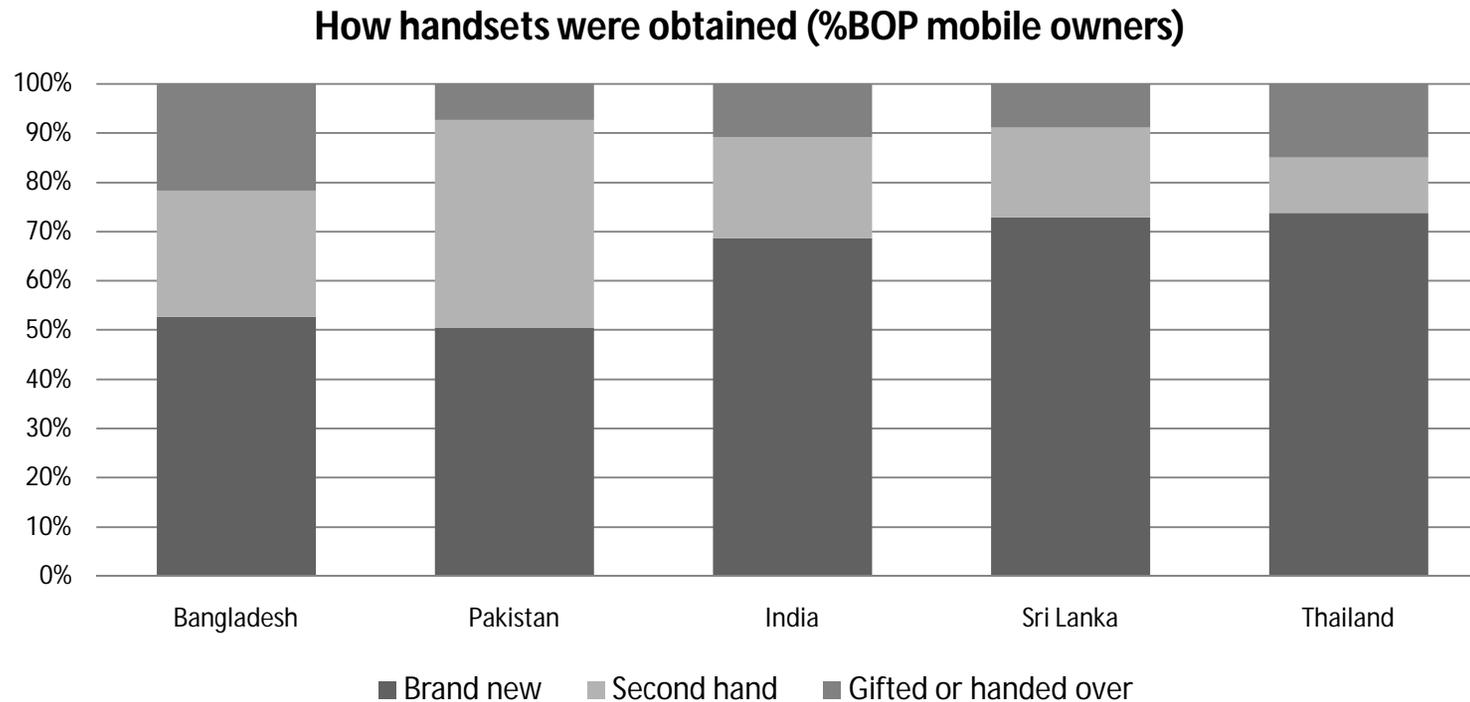


# Sri Lanka performs best on perceptions of how frequent quality problems are faced by BOP

Frequency of the problem faced (among mobile owners that face the problem)  
0 = Never, 4=Always



# Over 50% of BOP handsets were brand new when obtained (PK BOP highest with 2<sup>nd</sup> hand)



# Thai BOP spends more on handsets

## Approximate price paid for handset (USD)

	Mean	SD
Bangladesh	37	24.5
Pakistan	43	129.3
India	45	63.7
Sri Lanka	51	32.2
Thailand	93	82.2

Findings

# **SUMMARY**

# Summary

- Access is improving at both personal and household levels
  - Phones overtaking TV and radio
  - Mostly mobile: majority of BOP own a mobile; many on second handset
  - QOS problems perceived by BOP are moderate
- Use 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 has not progressed much since 2008

[samarajiva@lirneasia.net](mailto:samarajiva@lirneasia.net)

[www.lirneasia.net](http://www.lirneasia.net)