

What do we know about the teleuse of those “not like us”?

Rohan Samarajiva

15 March 2012, Atlanta



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

Java study used a different method. Represents those making less than USD 1.25/day

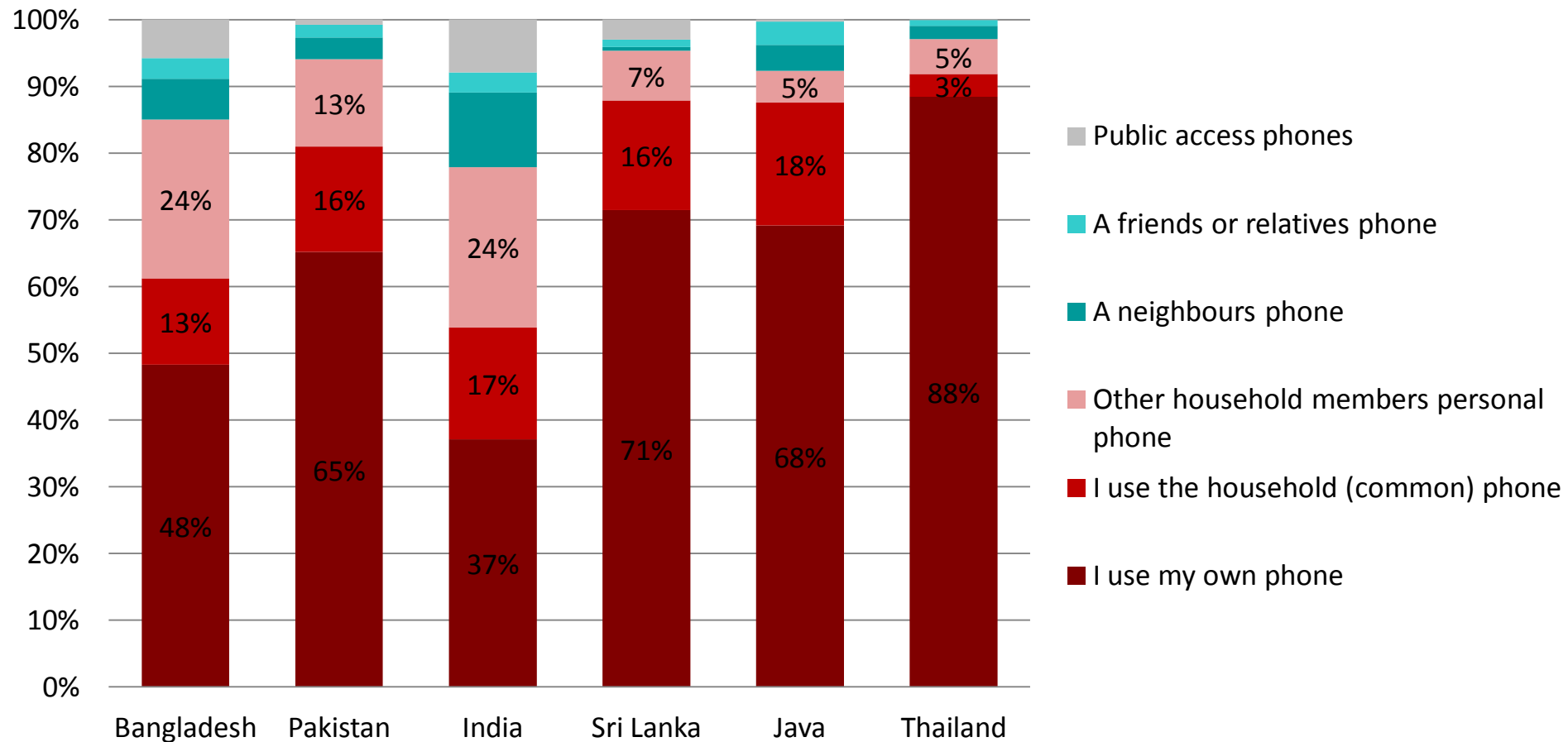
89-99% of BOP had used a phone in previous 3 months

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%

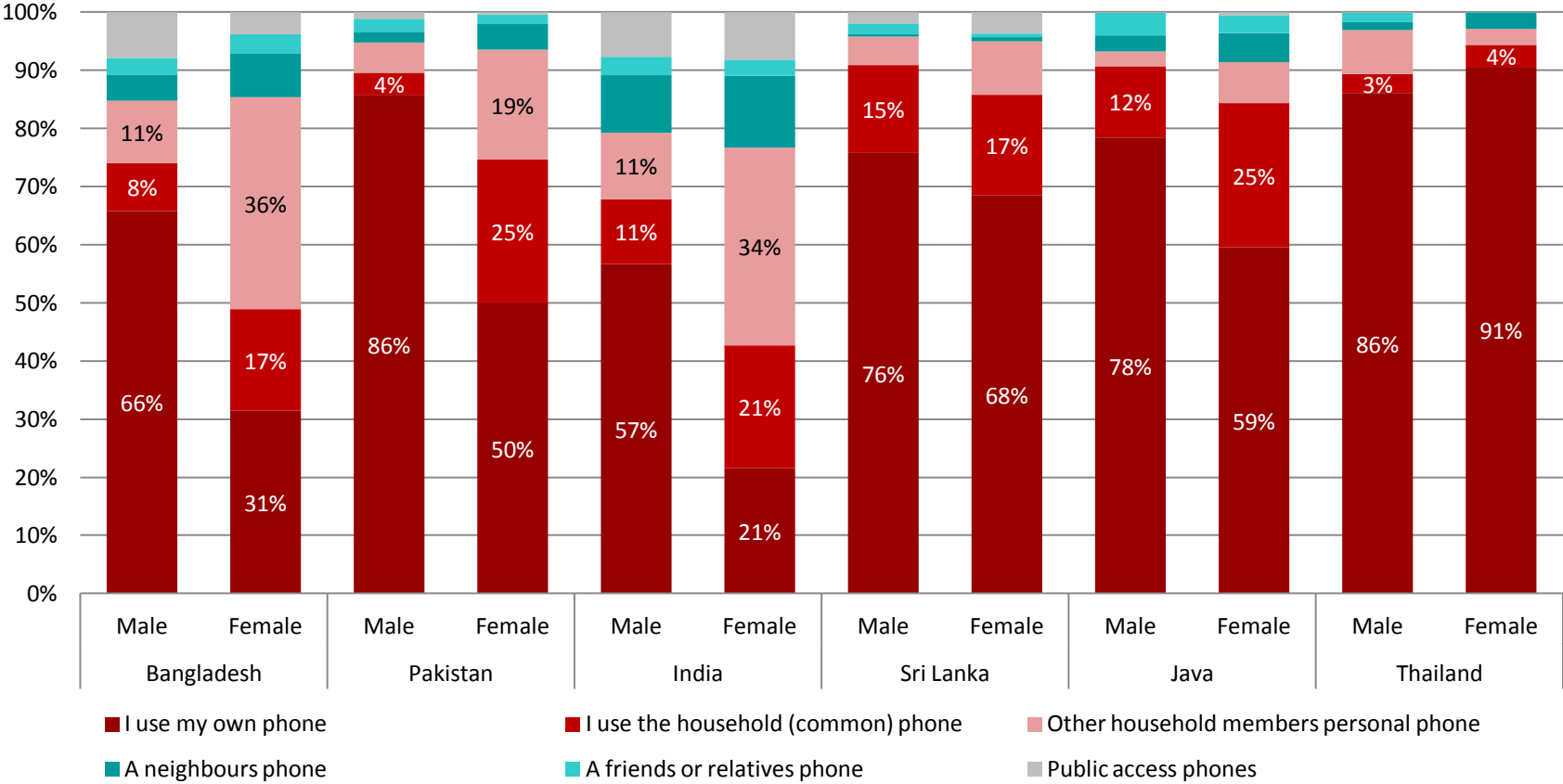
> 75 % of BOP have access within the household

Most frequently used phone (% of BOP teleusers)



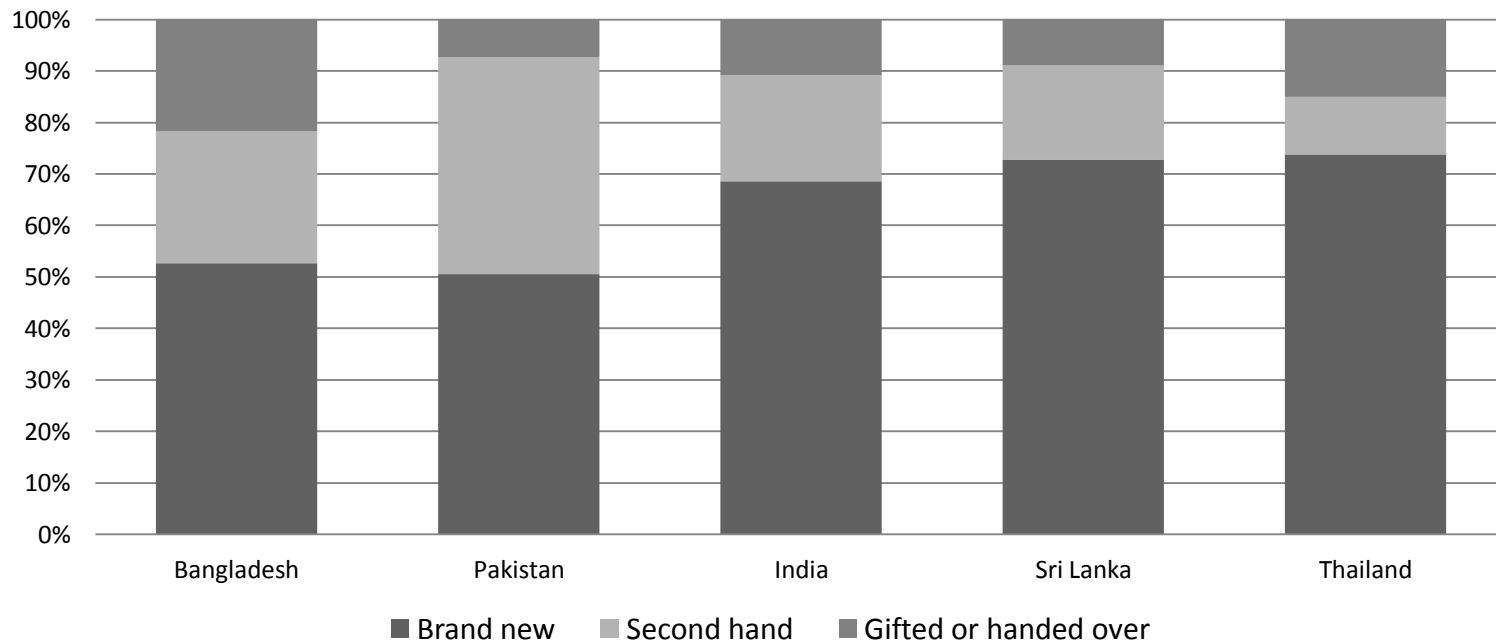
Male vs female: Greater dependence by BOP females on household phones & others' phones within household, except in TH

Most frequently used phone (% of BOP teleusers)



Over 50% of BOP handsets were brand new when obtained (PK BOP has highest secondhand use)

How handsets were obtained (%BOP mobile owners)



Thais spend the most on handsets

	Brand new		Second hand	
	Mean (USD)	SD	Mean (USD)	SD
Bangladesh	44	25	23	12
Pakistan	50	72	23	31
India	51	68	24	15
Sri Lanka	56	31	28	28
Thailand	100	85	47	44

High prices indicate presence of smartphones: Thailand BOP has; Sri Lanka BOP does not.

What they do with mobile phones at BOP

Among BOP mobile owners

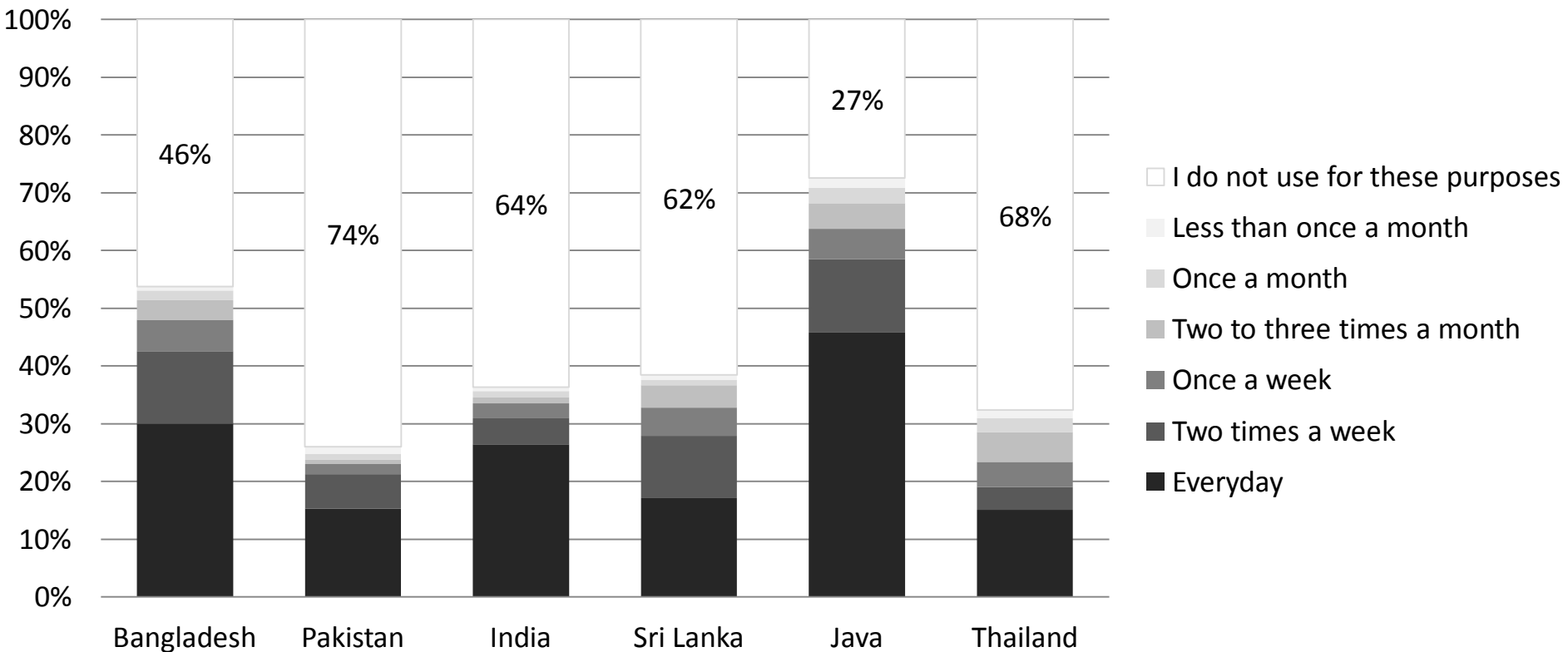
	% of BOP mobile owners					
	B'desh	Pakistan	India	S'Lanka	Java	Thailand
Make phone calls	100	99	100	99	96	100
Receive phone calls	100	95	99	100	94	99
Send/receive missed calls	86	71	78	65	54	24
Send/receive SMS	19	38	23	55	89	37
Send/receive MMS	1	2	3	5	14	8
Send/receive e-mail				1	3	2
Browse the Internet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

SMS and entertainment more popular among those below 35

	B'desh		P' tan		India		S Lanka		Thailand	
	35 or less	Above 35	35 or less	Above 35	35 or less	Above 35	35 or less	Above 35	35 or less	Above 35
Taking phone calls	100%	100%	99%	99%	100%	99%	100%	98%	100%	100%
Receiving phone calls	100%	100%	95%	95%	99%	99%	100%	100%	99%	99%
Sending/receiving missed calls	87%	84%	74%	65%	82%	71%	77%	49%	32%	17%
Sending/receiving SMS	25%	5%	46%	20%	29%	10%	73%	32%	50%	23%
Sending/receiving MMS	2%	0%	3%	0%	4%	1%	8%	1%	14%	2%
Sending/receiving e-mail	0%	0%	0%	0%	0%	0%	1%	0%	3%	1%
Browsing the Internet	4%	0%	0%	0%	1%	0%	2%	0%	9%	1%
Taking photos/video	24%	7%	8%	5%	10%	4%	20%	7%	29%	9%
To play games	35%	9%	24%	13%	23%	8%	15%	5%	26%	6%
To listen to radio	16%	4%	17%	12%	15%	6%	20%	12%	25%	12%
To listen to music	31%	11%	7%	2%	18%	8%	11%	3%	46%	14%
To share that you have content created	1%	0%	2%	0%	4%	1%	3%	1%	5%	1%
To send/receive or download/upload other content	2%	0%	2%	0%	3%	1%	2%	1%	5%	1%
As an organizer	8%	4%	6%	5%	9%	7%	3%	1%	10%	6%
To check my bill/credit	13%	12%	23%	12%	11%	10%	20%	16%	4%	3%
Sending/receiving talktime/load	11%	9%	6%	3%	2%	1%	2%	2%	0%	1%
To access facebook	1%	0%	0%	0%	0%	0%	2%	0%	4%	0%
To access other social networking or blog applications	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%

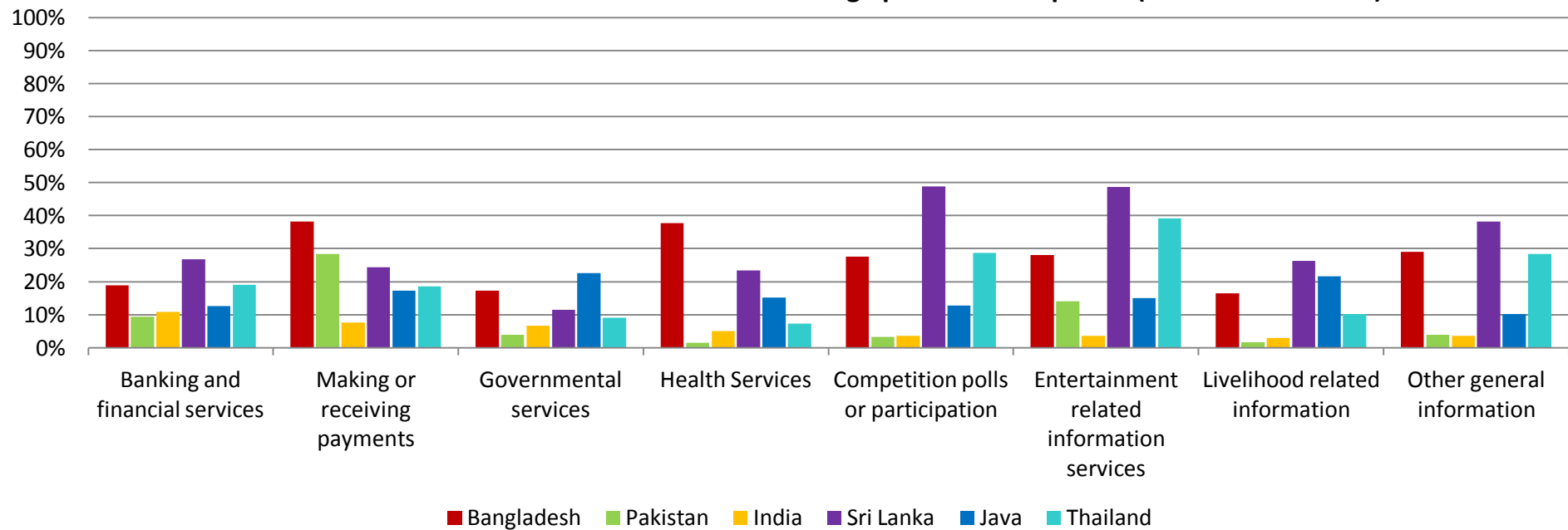
Use of mobiles for financial, business or work communication highest in Java

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



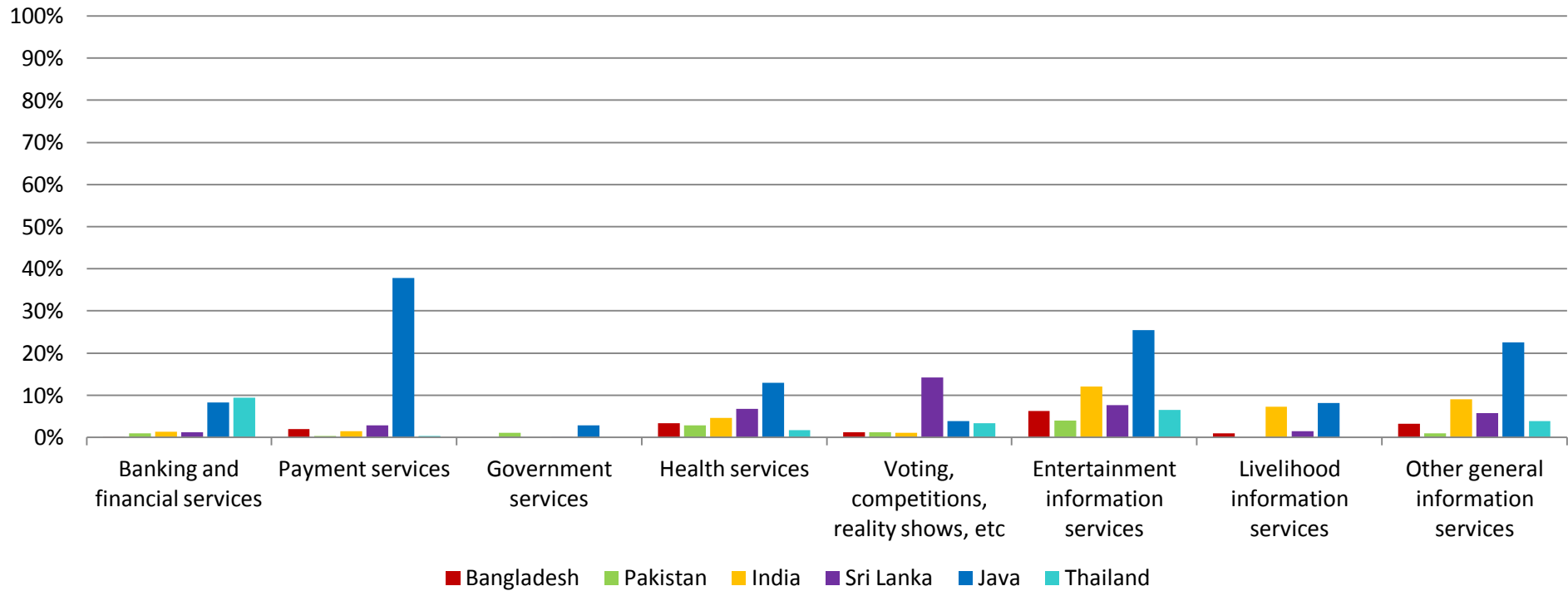
Awareness of more-than-voice services low in general

Awareness of MTV services that can be accessed through phone or computers (% of BOP teleusers)



... Use even lower

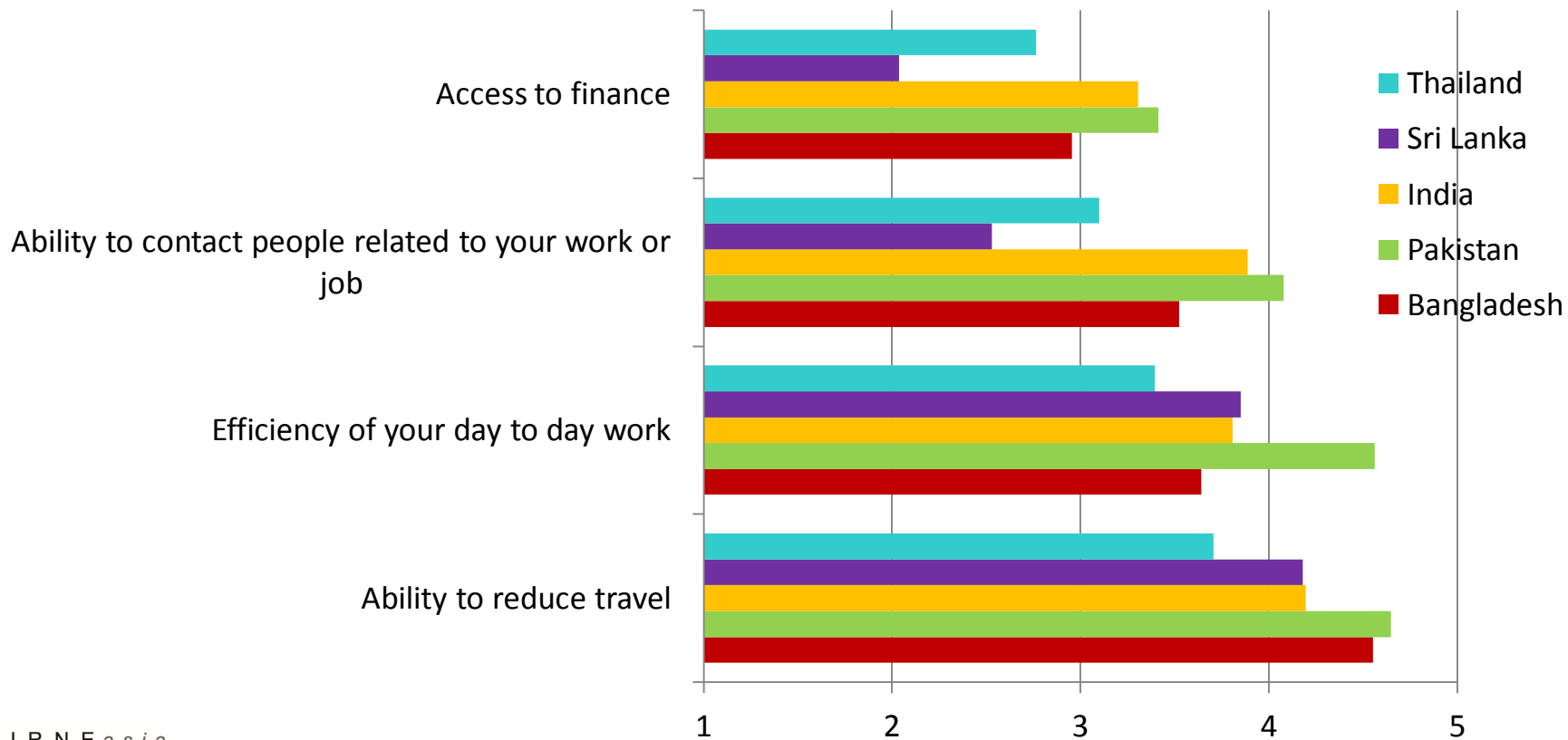
MTV service usage through phone or computer (% BOP aware of services)



Among BOP who are aware of MTV services

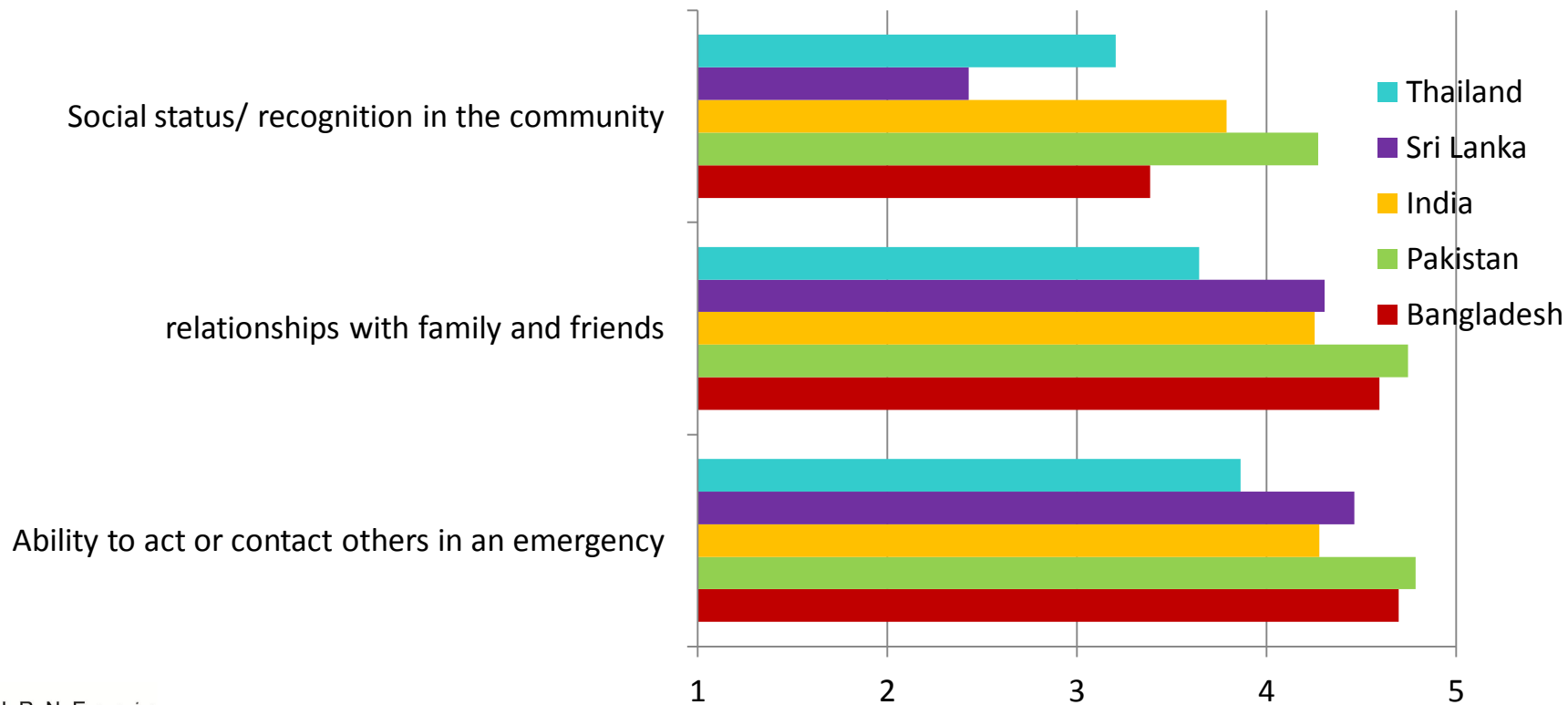
Main perceived economic benefit is reducing travel

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






Voice telephony mainly benefits personal life

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



Ag micro enterprise survey

Research Objective- Understanding the use of ICTs and Information requirements of farmers (growers) and collectors, traders & retailers (non-growers)

			
Sample size (grower)	100	205	100
Sample size (Non-growers)	100	147	100

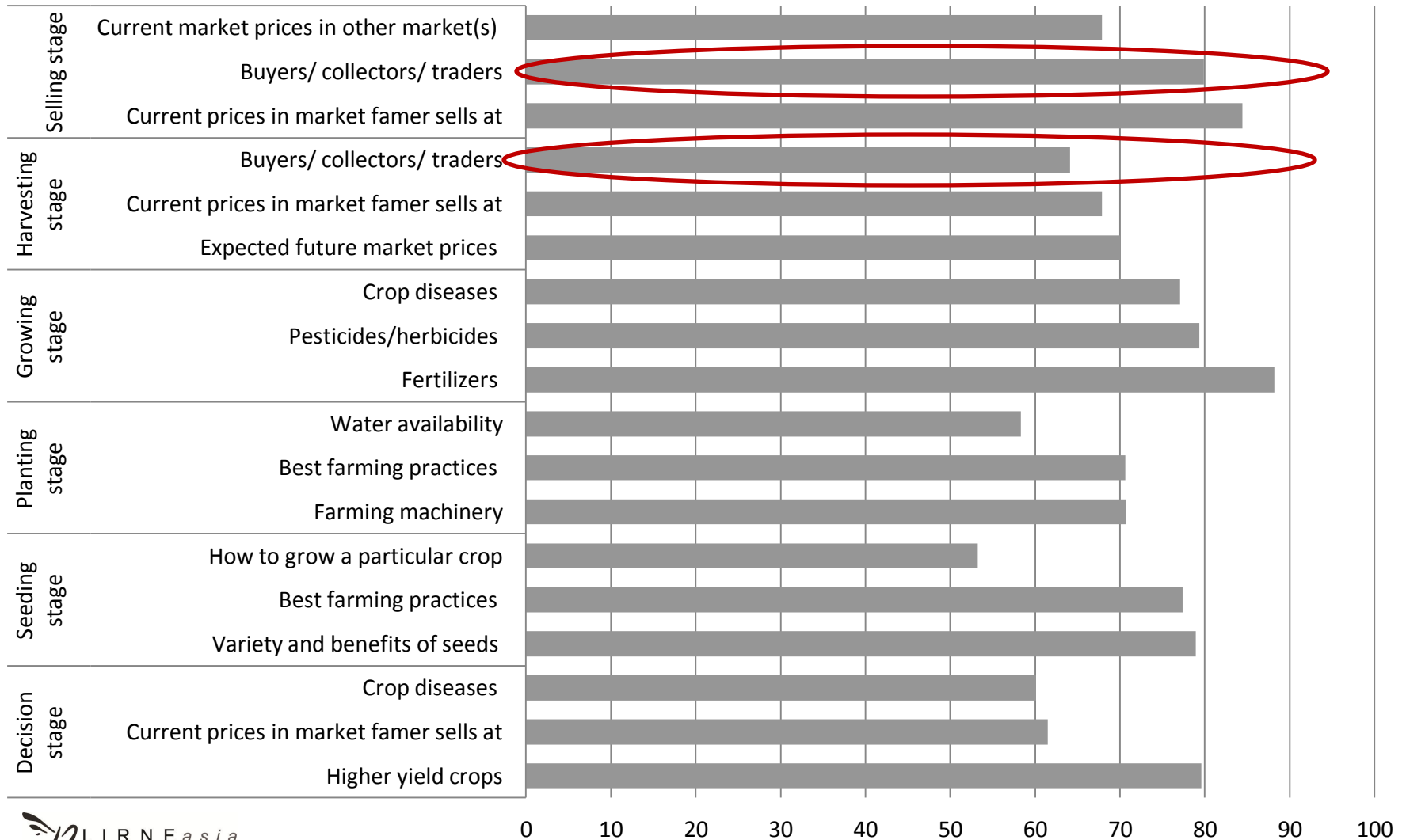
growers are:

- owner farmer / leased farmer / agricultural worker
- the main decision maker regarding farming activities
- selling some part of his crops to generate the income
- working on less than 5 acres

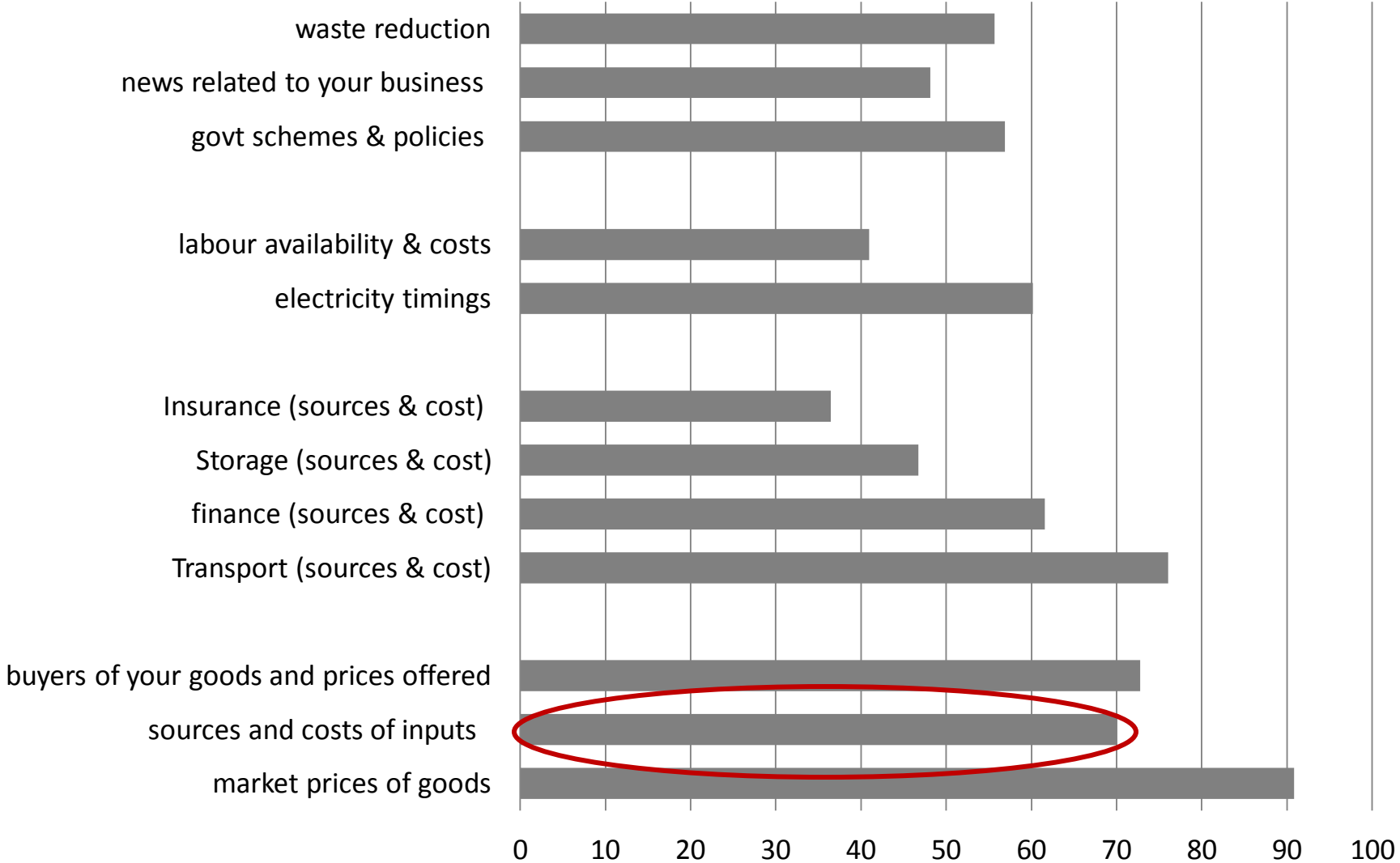
non-growers are:

- Trader / Commission agent / Collector / Retailer of agricultural food crops
- Belonging to SEC C, D, E households
- Owners of a micro enterprise with 0 – 9 employees

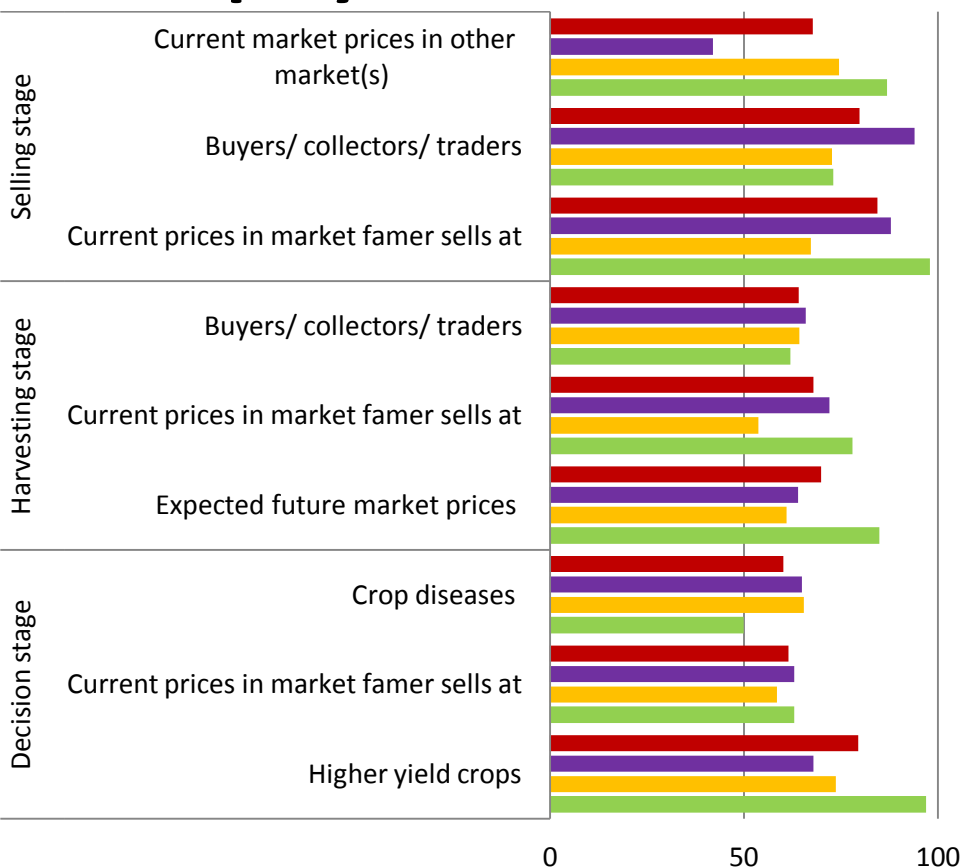
Growers are looking for non growers...



...and non-growers are looking for growers

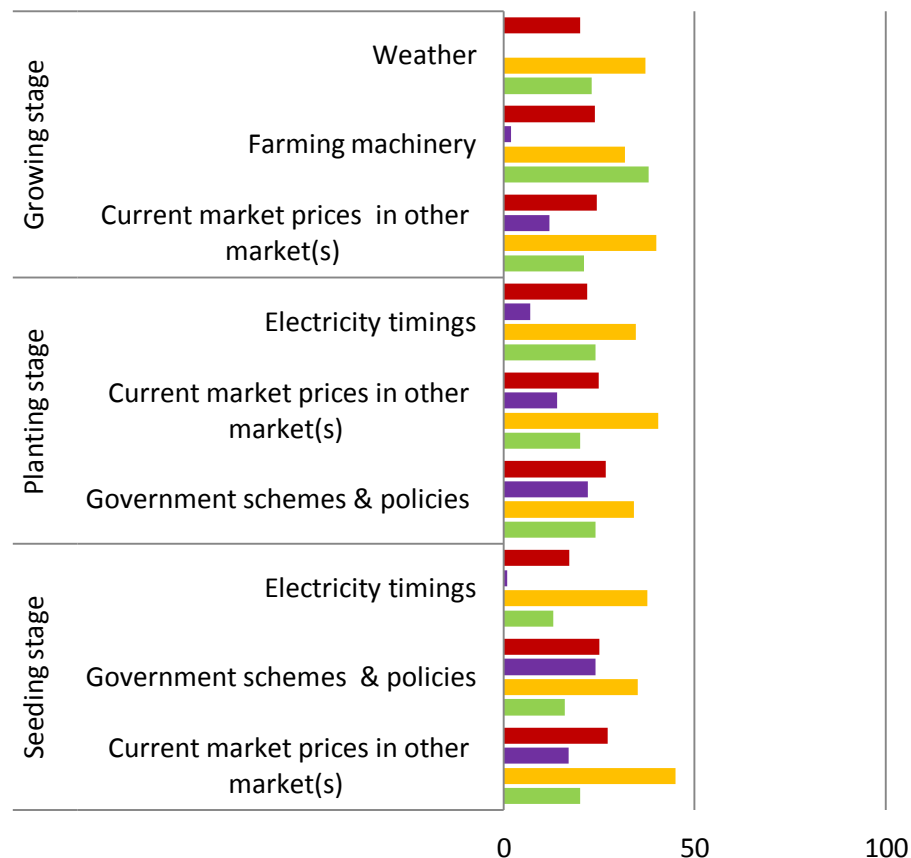


Different info sought by growers at diff times in crop cycle



■ Avg Info Req ■ Sri Lanka ■ India ■ Bangladesh

Top 3 information needs



■ Avg ■ Sri Lanka ■ India ■ Bangladesh

Bottom 3 information needs