

Teleuse@BOP4: understanding the use of ICTs by the BOP from emerging Asia

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ITS India Regional Conference

February 2012



This work was carried out with the aid of a grant from the International Development Research Centre, Canada and UKaid from the Department for International Development, 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
 - In 2011: This time it is 10,154 sample covering 6 countries
- 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

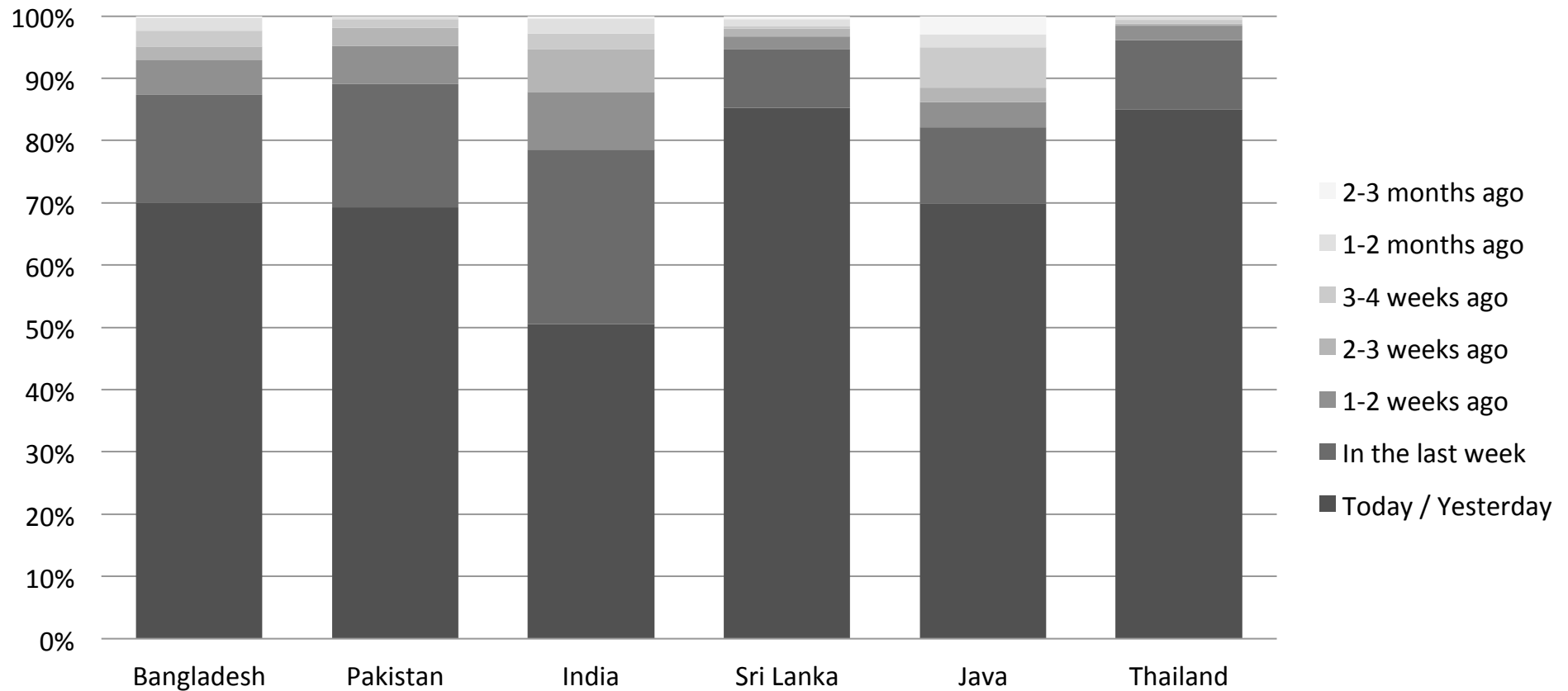
89-99% of BOP have used a phone in previous 3 months

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%

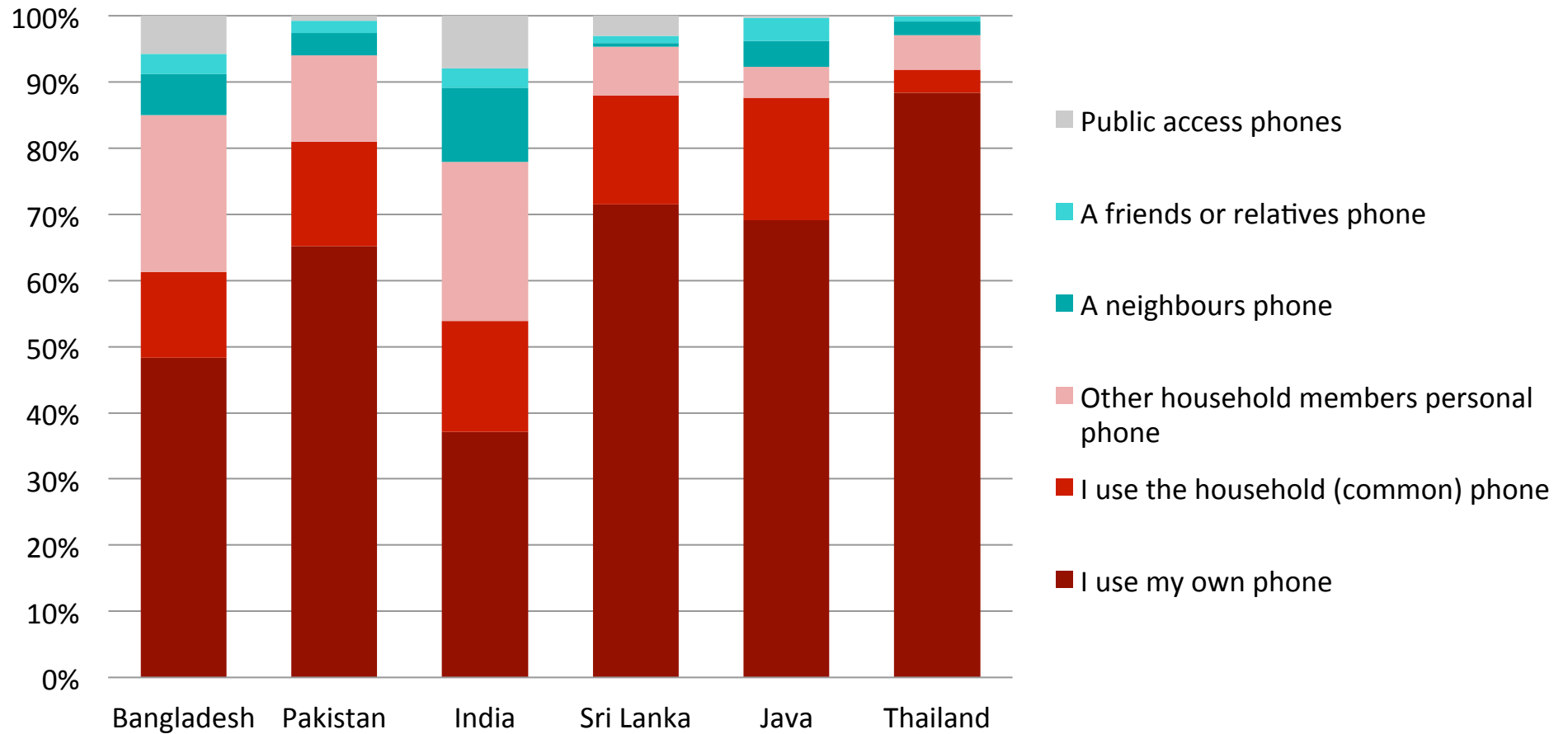
More 70% of BOP has made a call during the last week; atleast 69% in the last day (except India)

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



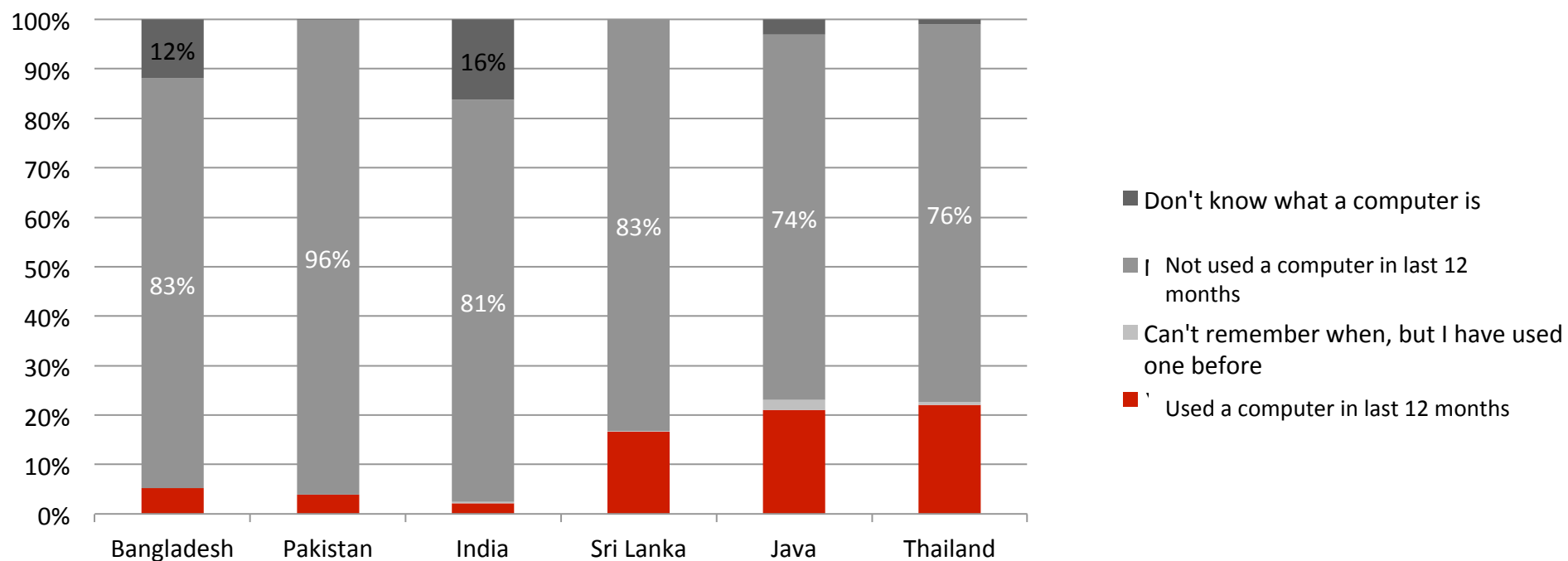
> 75 % of BOP have access within the household

Most frequently used phone (% of BOP teleusers)



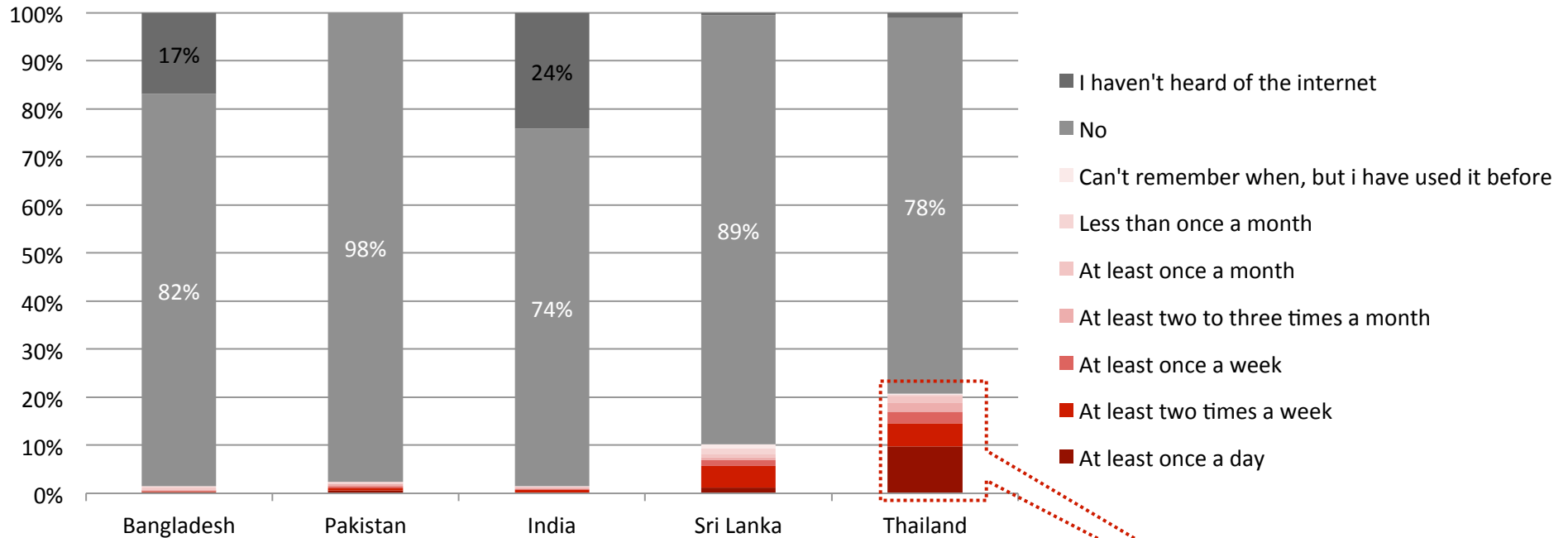
Awareness and use of computers very low at the BOP especially in BD & IN

Usage of computers (% of BOP teleusers)



Internet use at BOP is low; significant 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%

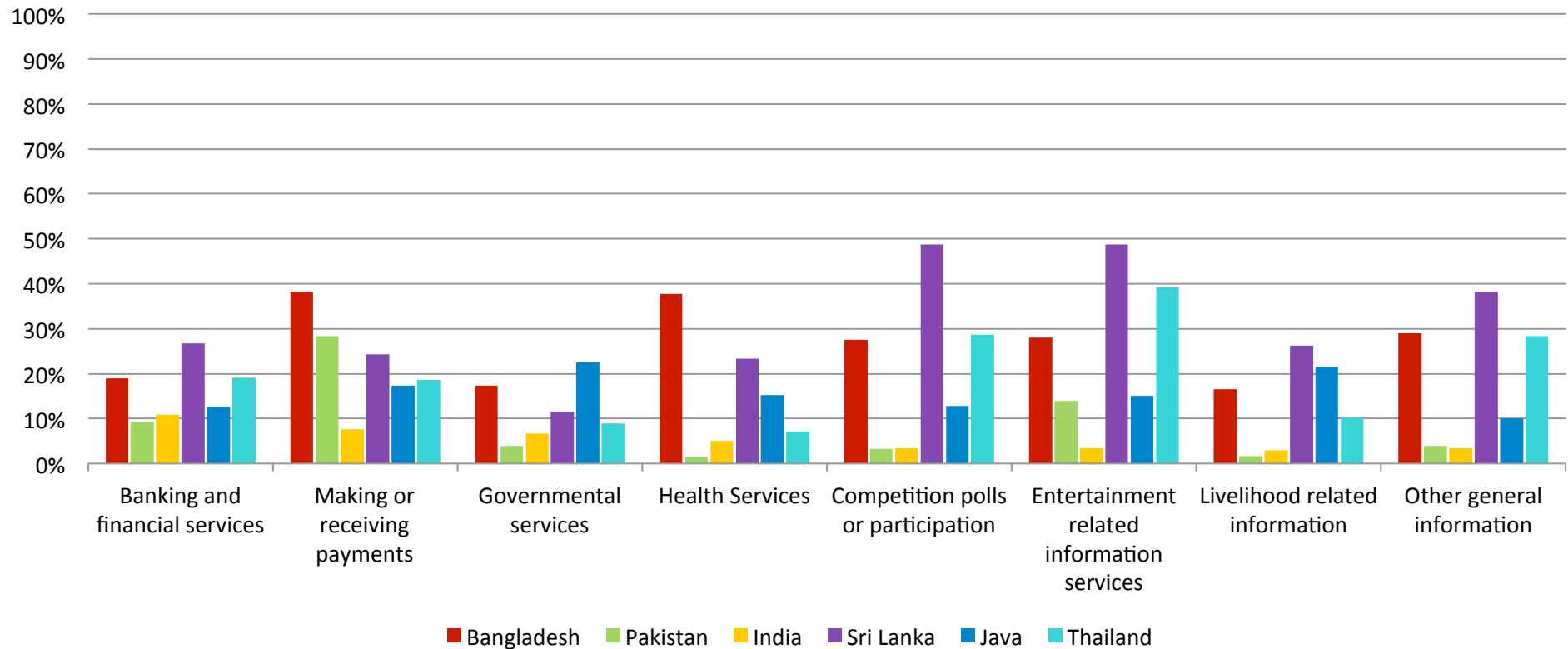
What BOP do with their mobile phones

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

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

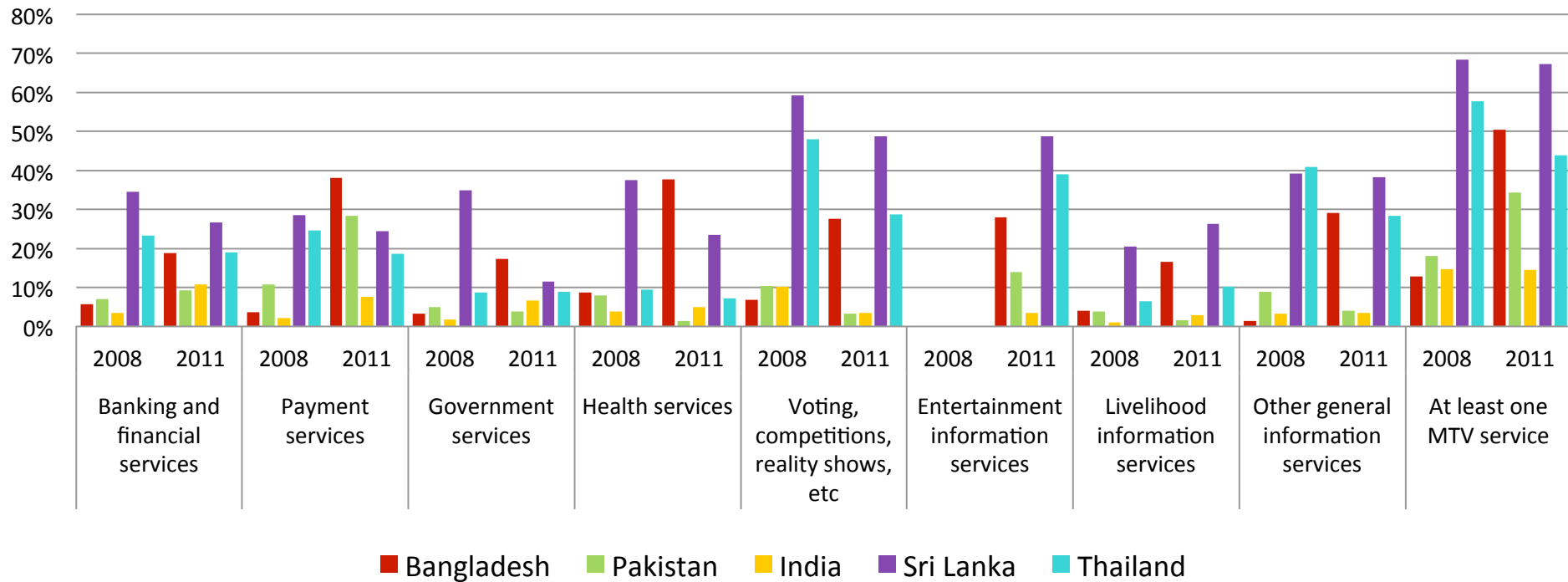
Awareness of More Than Voice (MTV) services that can be accessed through phone or computers
(% of BOP teleusers)



Among BOP teleusers

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

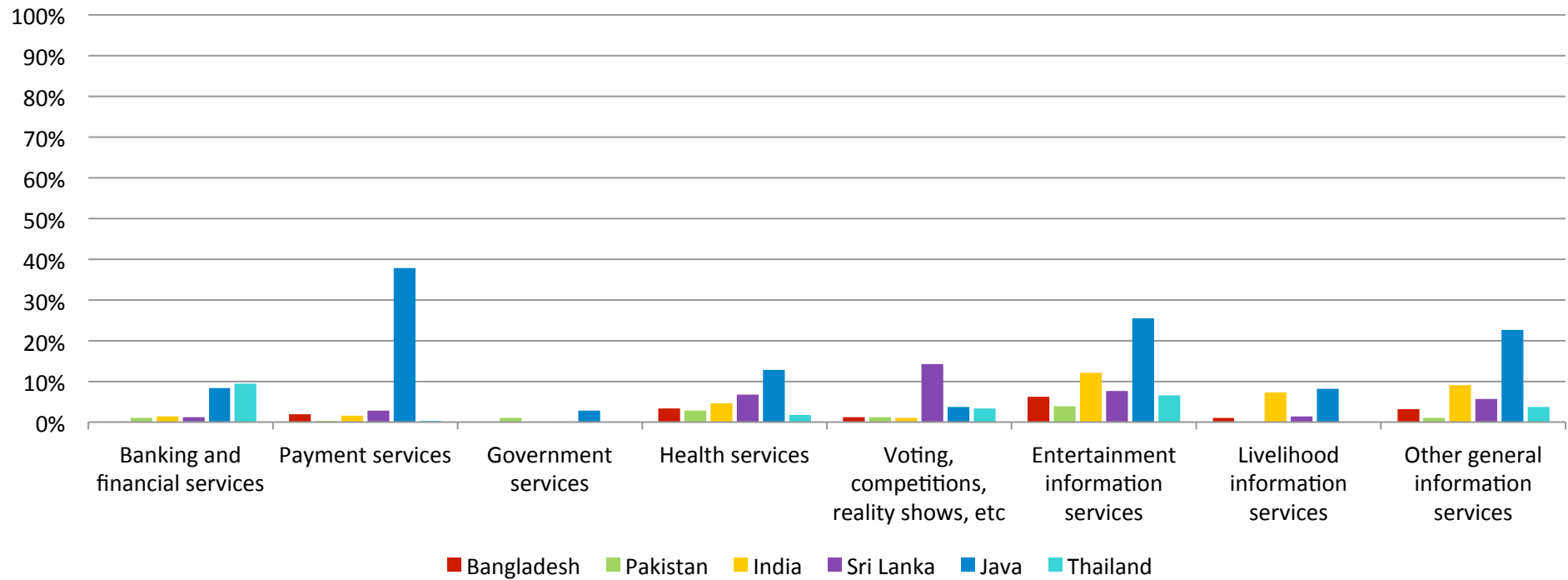
2008 vs 2011
Awareness of MTV services available on phones and computers (% of BOP teleusers)



Among BOP teleusers

BOP is not taking up MTV services

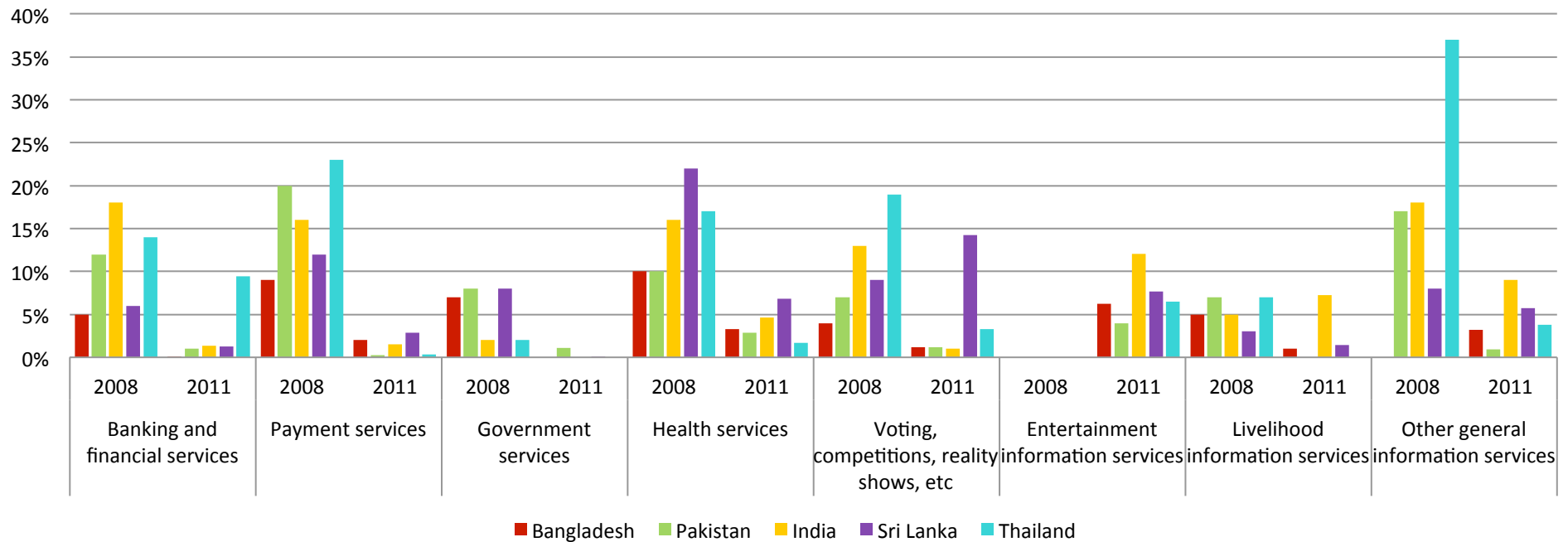
MTV service usage through phone or computer (% BOP aware of services)



Among BOP who are aware of MTV services

2008 vs 2011: MTV usage at BOP has fallen

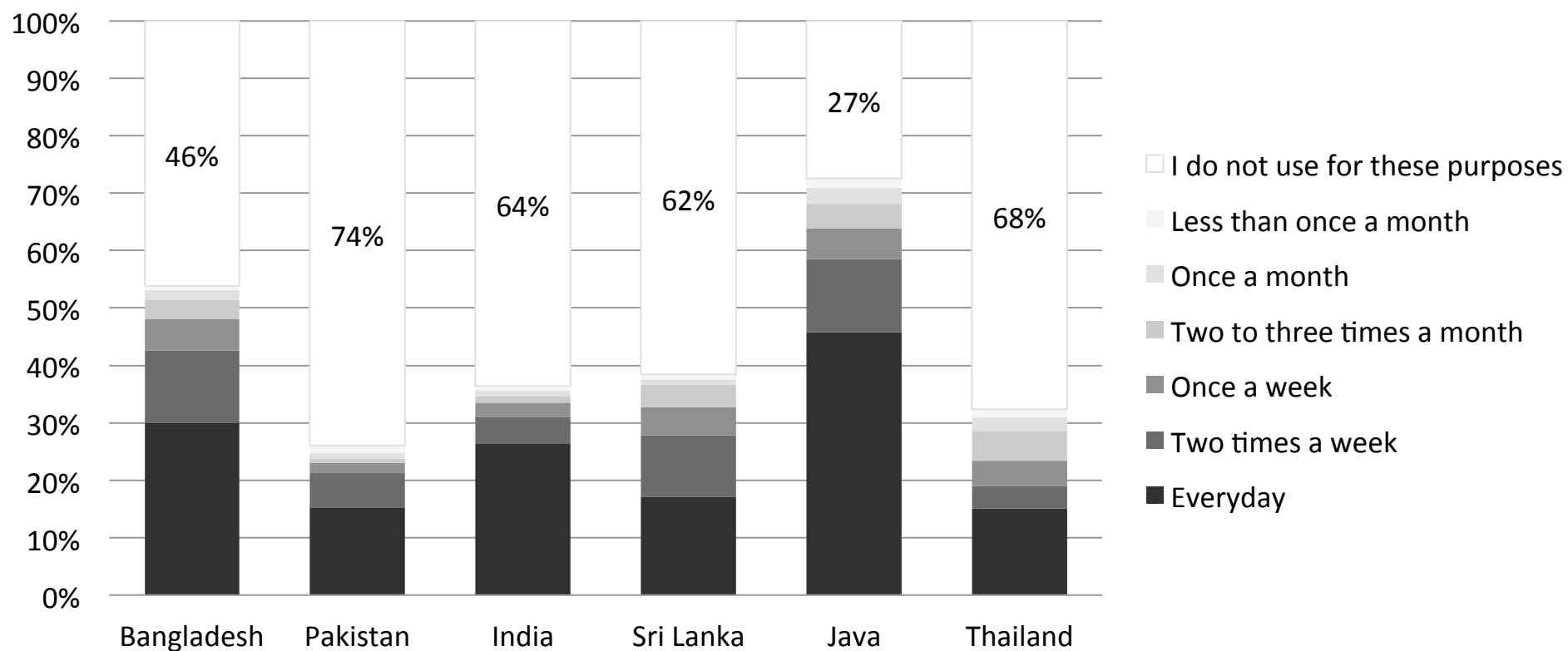
More-than-voice usage, 2008 vs 2011 (% of BOP teleusers who are aware of those services)



Among BOP teleusers who are aware of MTV services

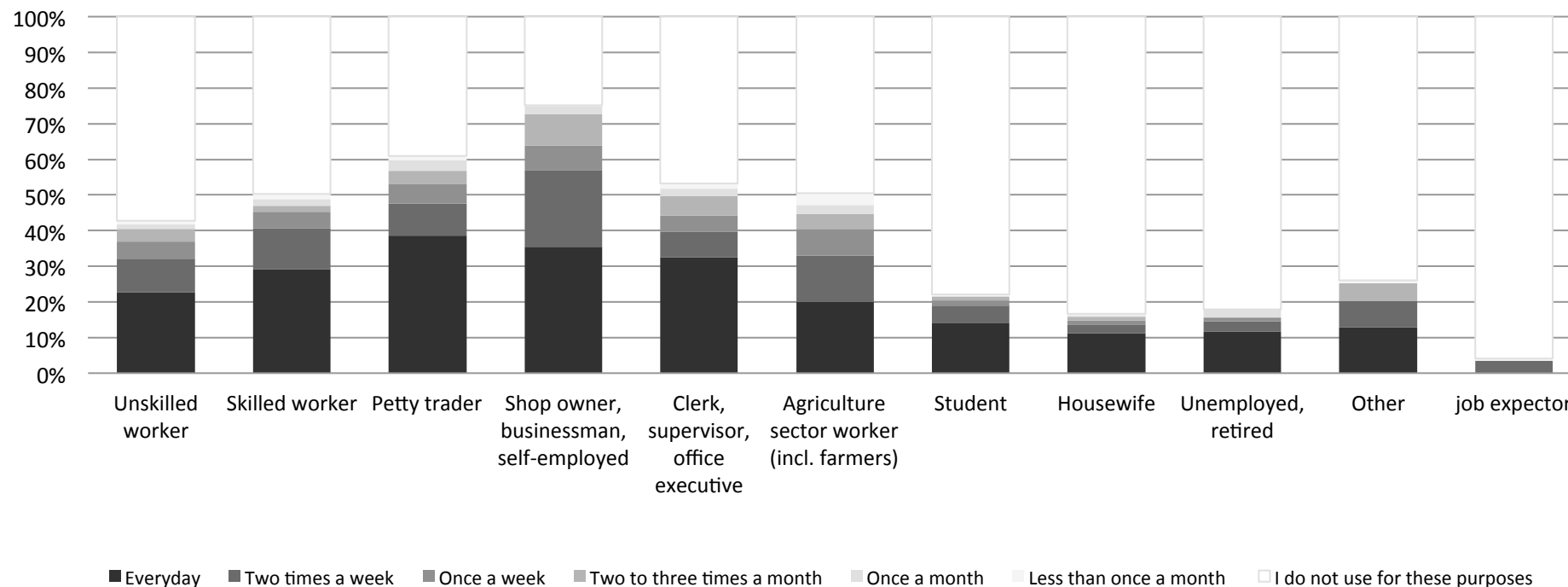
Majority at BOP don't use mobiles for financial, business or work communication, except in Java

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)



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
- Use is still limited to voice (with some SMS, radio, games etc)
 - Awareness and use of MTV services among BOP has not progressed much since 2008
 - Little use of mobile for productive purposes; benefits mostly perceived in emergency communication and maintaining relationships

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