

### Digital Sri Lanka during COVID-19 lockdowns

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### LIRNEasia: a pro-poor, pro-market Asia Pacific think tank; focus on infrastructure policy and regulation



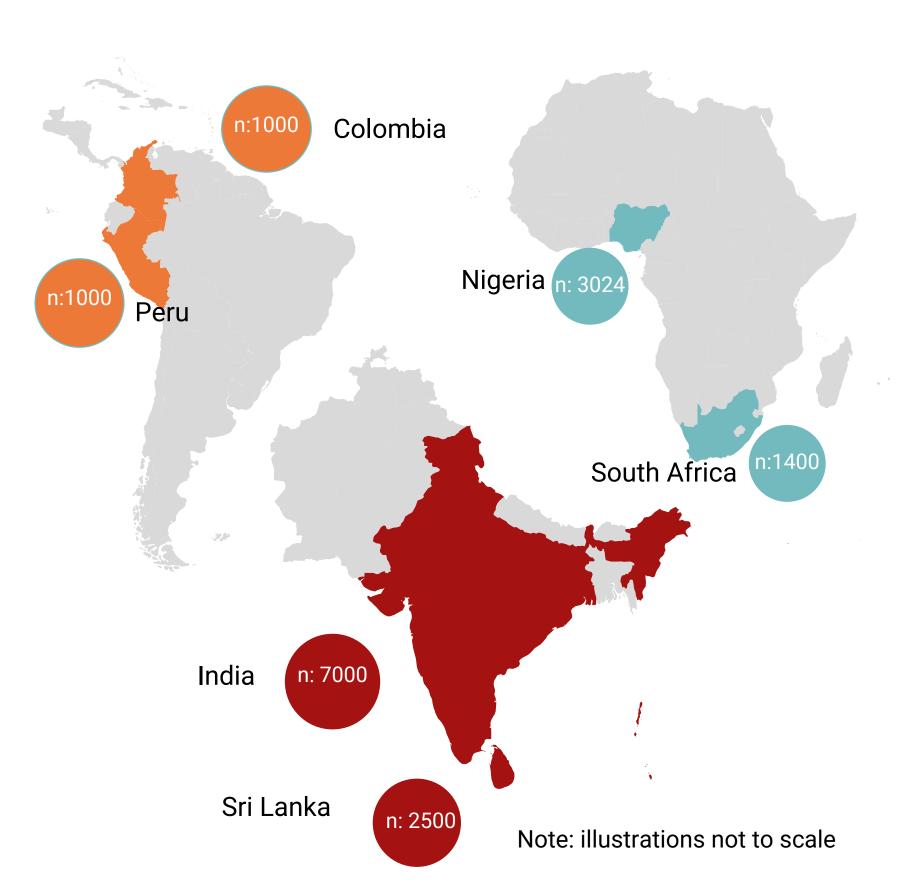
#### **Our Mission:**

"Catalyzing policy change through research to improve people's lives in the emerging Asia Pacific by facilitating their use of hard and soft infrastructures through the use of knowledge, information and technology"

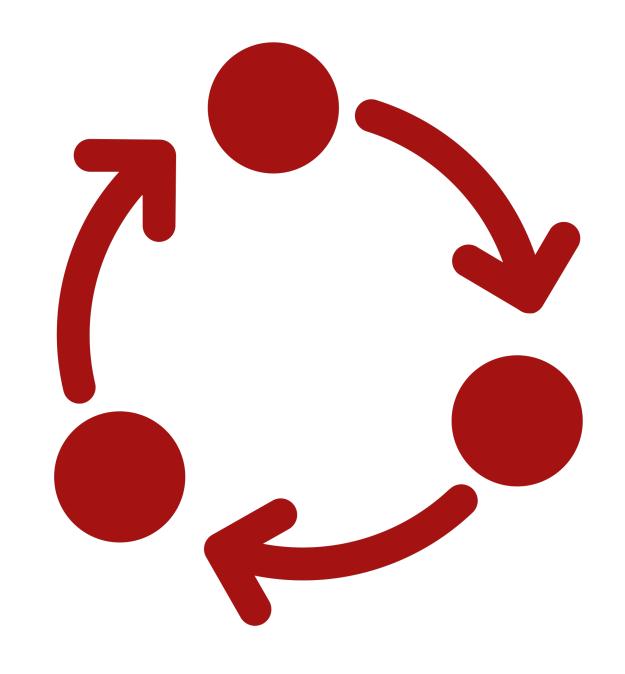


### **About the study**

- Assesses the socio-economic impacts of COVID-19 by analyzing access to last mile delivery of services (including education, food, work and government services), with a focus on digital technologies
- Funded by IDRC, through a joint grant given to 3 regional think tanks:
   LIRNEasia, Research ICT Africa and Instituto de Estudios Peruanos
- Research in Sri Lanka and India conducted by LIRNEasia
- Fieldwork in Sri Lanka conducted by Survey Research Lanka (selected through a competitive bidding process)





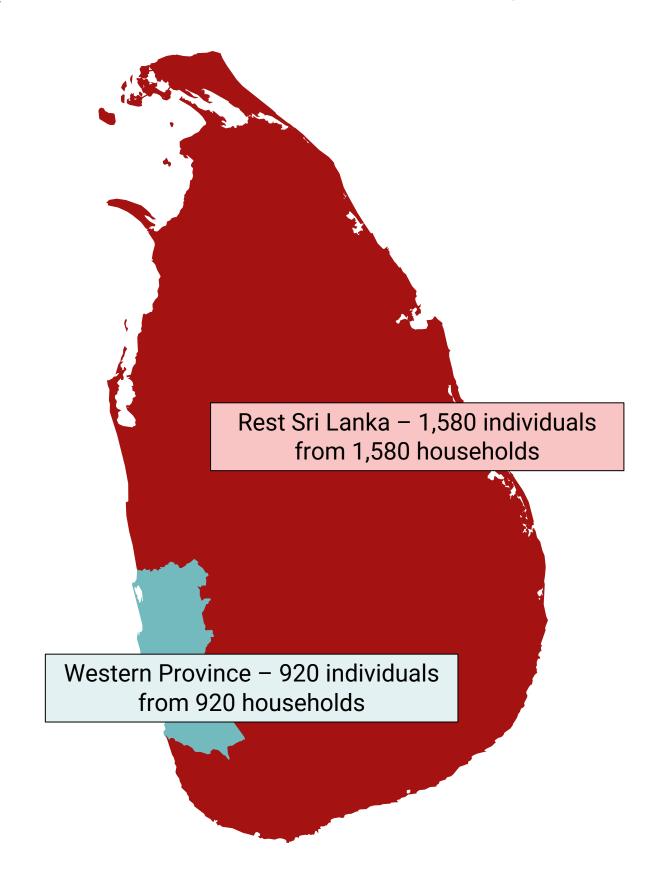


### Methodology





(95% confidence interval; +/-2.8% margin of error)



#### Nationally representative sample





**GN** divisions

Sample designed to be representative of 15+ population at:

- National level,
- Urban-rural level
- Men vs. women
- Western province vs rest Sri Lanka
- SEC (socio-economic classification, a proxy for income)
- Age

Fieldwork time period: 4-Mar-2021 to 11-Oct-2021



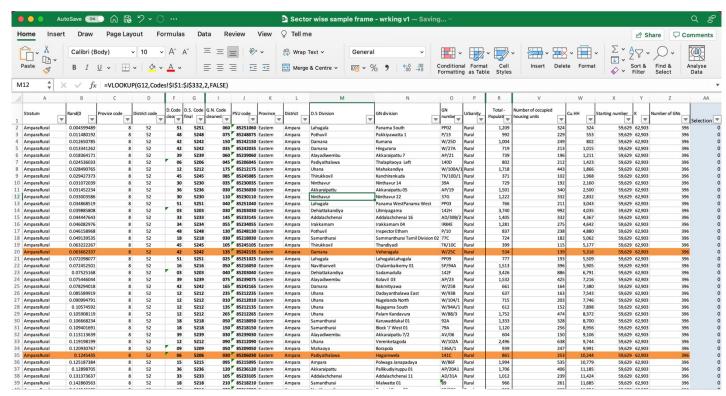
#### Stage 1

Stratified random sampling of the primary sample units (PSUs) with probability proportionate to size (PPS) sampling

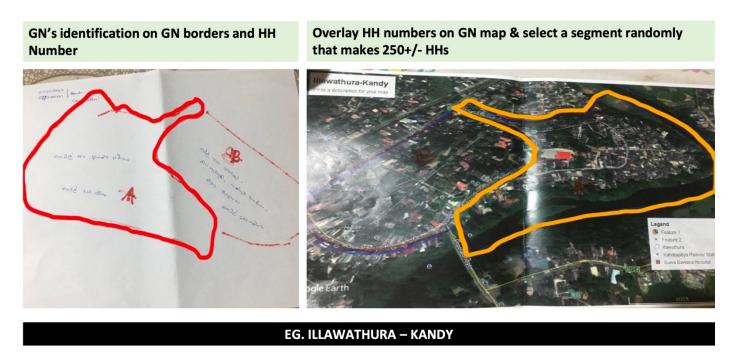
Split the sample frame\* into urban and rural PSUs

Randomly select required number of PSUs using PPS

Segment PSUs with > 250 households, and select 1 segment randomly for listing



Sri Lanka sample frame



A segmentation map



## Obtain PSU information (boundaries, households, etc.) from key informants (KIs)

#### Stage 2

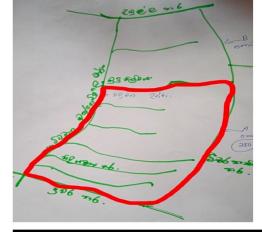
Mapping and listing of selected PSUs

#### Mapping & segmentation

- Verify the Survey department's GN level map of randomly selected GN with the help of key informants
- Segment wards and villages where the number of households > 250

#### GN's identification on GN borders and HH Number

#### Overlay HH numbers on GN map & select a segment randomly that makes 250+/- HHs





EG. KURUNEGALA TOWN EAST

Segment map of Kurunegala town east GN

#### Listing of households

List structures of the entire segment to identify the eligible households for sampling





Listing is being conducted by enumerators

#### Stage 3

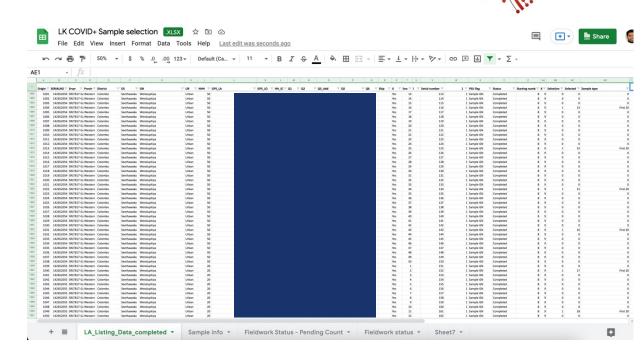
Random selection of listed households

#### Stage 4

Household interview (with household head or suitable representative) and individual interview (with randomly selected individual)

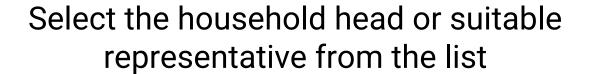
### Randomly select households through systematic random sampling using the household lists collected during the listing

Randomly select 20-25 households for the main survey by the research team



Random selection of households for the main survey

List all the household members in the household roster



Conduct the household section of the interview

Randomly select a member aged 15+ from the list

Conduct the individual section of the interview





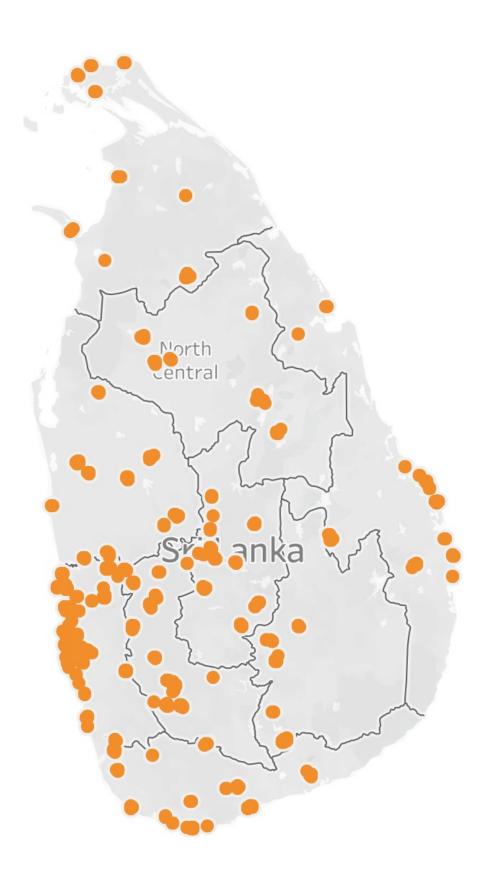




Household and individual interviews are being conducted by enumerators



### Sample household locations (GPS locations)







### Findings

- Internet access & use
- Impacts on
  - Education
  - Work & household income
  - Access to food & platforms
  - Government services & contact tracing





# Internet access & use



### 61% of households had an active internet connection; 44% of the population aged 15+ were internet users

of households had an active internet connection

3.9 m households

households



of 15 + population were internet users



7.3 m individuals

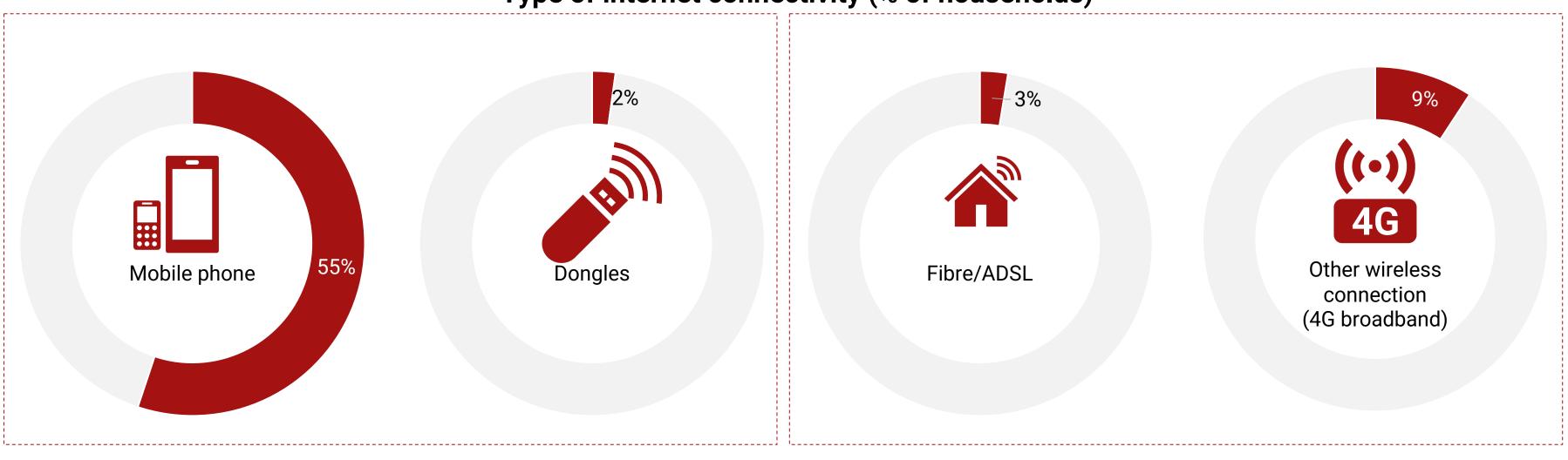
Q2: Have you ever used the Internet? (Websites and applications like Google, Facebook, WhatsApp, email, etc.)

Q1: Does this household have a working Internet connection, if so what type? (one that is exclusive for the household and is accessible to all household members)



## 55% of households used mobile phones for internet connectivity



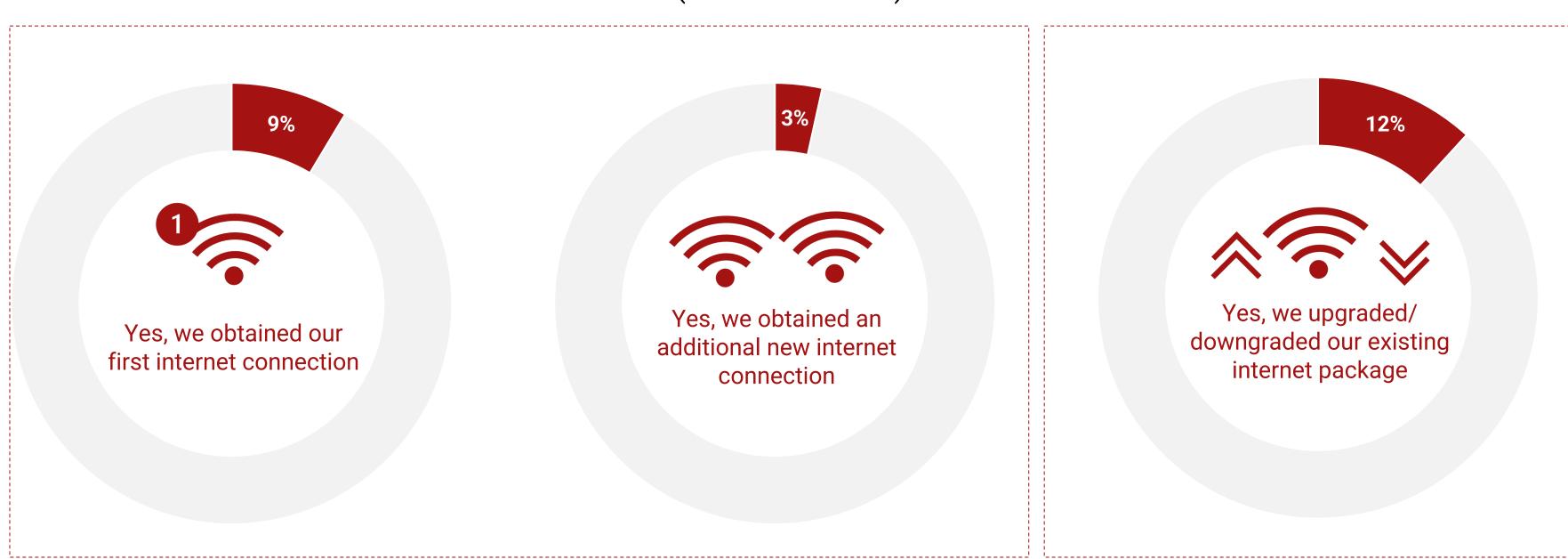


Mobile

- Q1: Does this household have a working Internet connection, if so what type? Internet using mobile phones (using the mobile phone itself or using the mobile as a Wi-Fi hotspot)
- Q2: Does this household have a working Internet connection, if so what type? Internet using dongles
- Q3: Does this household have a working Internet connection, if so what type? Internet access using wired connection such as Fibre/ADSL
- Q4: Does this household have a working Internet connection, if so what type? Internet using other wireless connection (4G broadband etc.)

# 12% of households obtained a new internet connection due to the pandemic; another 12% changed their existing internet package

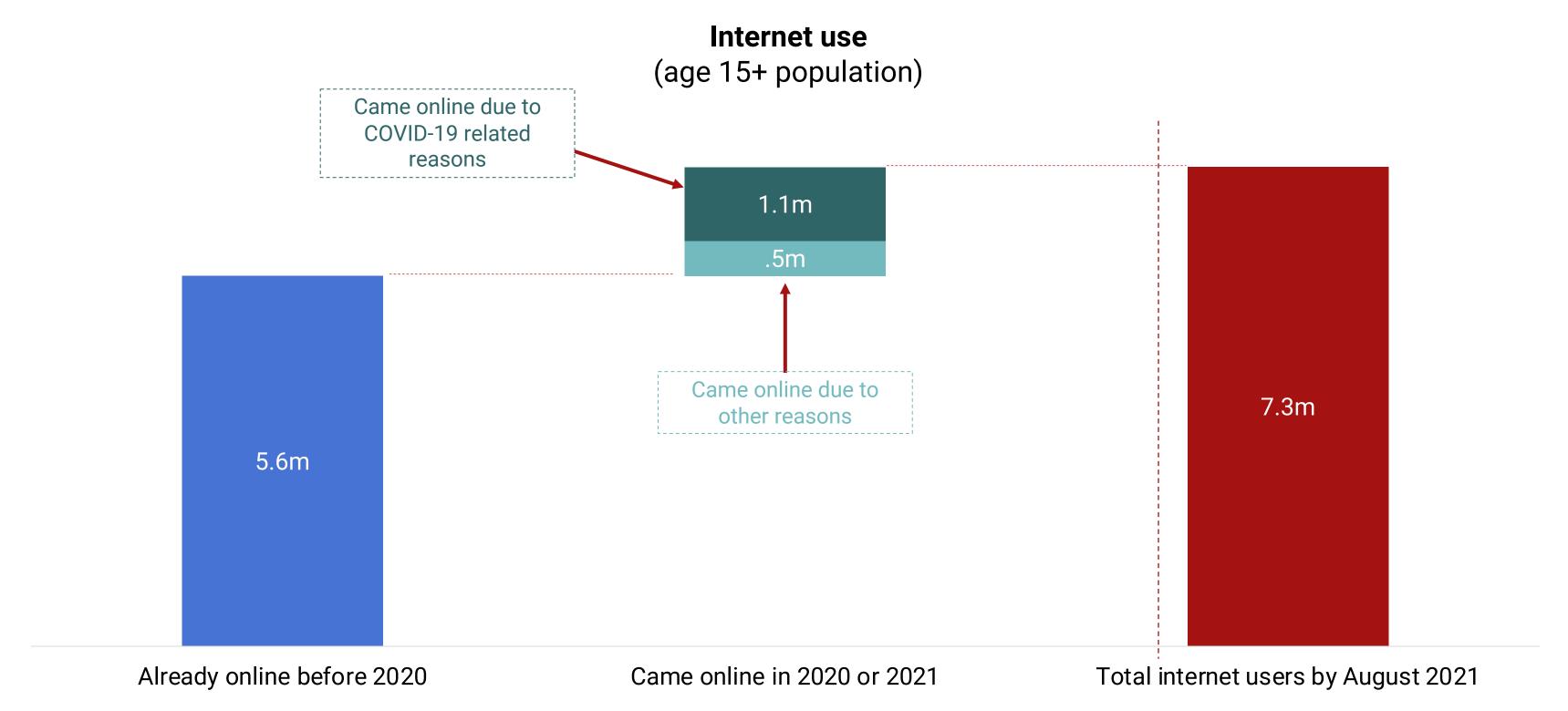
Changes to the internet connection due to COVID-19 crisis (% of households)



New connection Changed package

#### LIRNEasia Pro-poor. Pro-market.

## 1.6 million individuals came online in 2020 and 2021; 68% (1.1m) of which due to COVID-19 related reasons



An earlier version of this slide set contained an error in this slide. This has been corrected

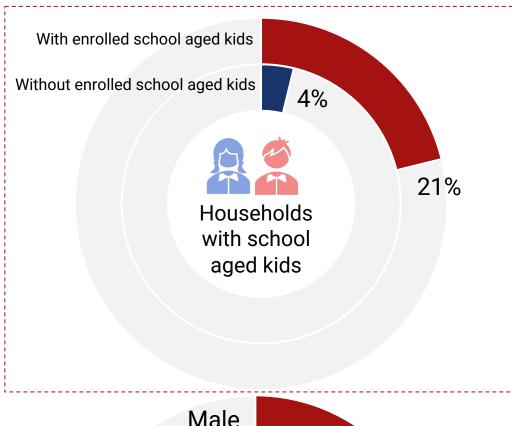
Q1: When did you first use the internet?

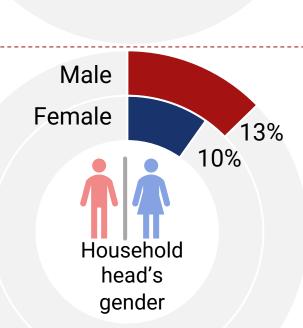
Q2 : Did you begin using the internet/get online as a result of the COVID-19 crisis?

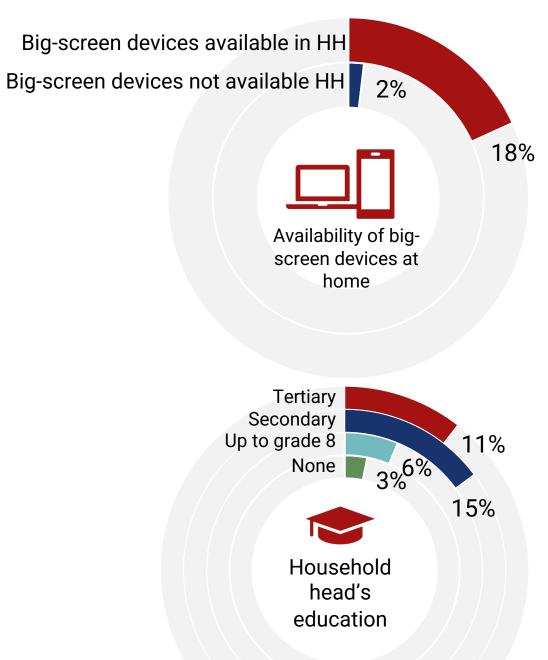


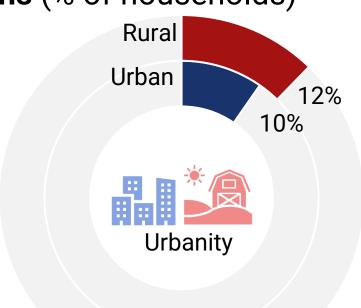
## Majority of households that got connected were those with school going children

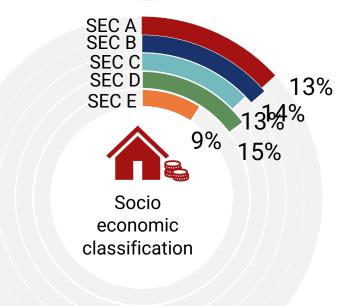
Households who obtained a new internet connection due to COVID-19 related reasons (% of households)













## Internet use in Sri Lanka below that of countries with lower GNI per capita such as India and Nigeria

Country	GNI per capita (Atlas method, current USD, 2020)	Internet use (% of 15+ population, 2021)
India	1,900	47%
Nigeria	2,000	54%
Sri Lanka	3,720	44%
South Africa	5,410	62%

Sources: World Bank, LIRNEasia, Research ICT Africa

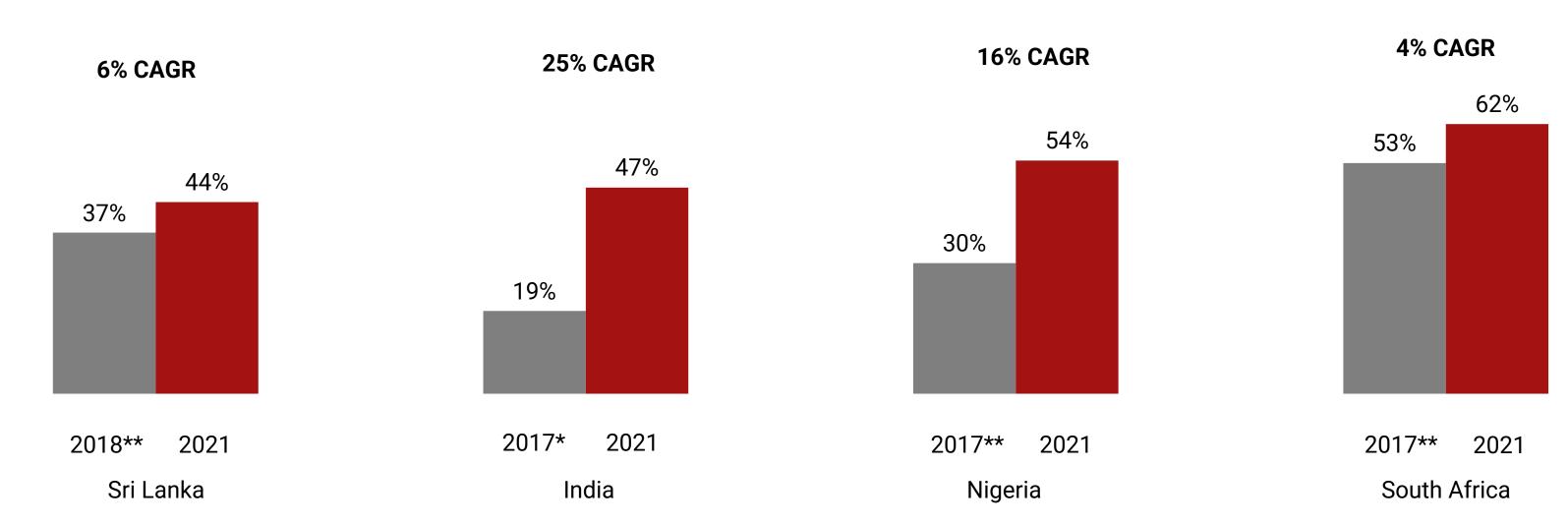
Q: Have you ever used the Internet? (Websites and applications like Google, Facebook, WhatsApp, email, etc.)



## India's and Nigeria's faster internet take up responsible for Sri Lanka being overtaken

#### Internet use

(% of age 15+ population)



<sup>\*</sup> for the ages of 15-65 population including Kerala.

<sup>\*\*</sup> for the ages of 15-65

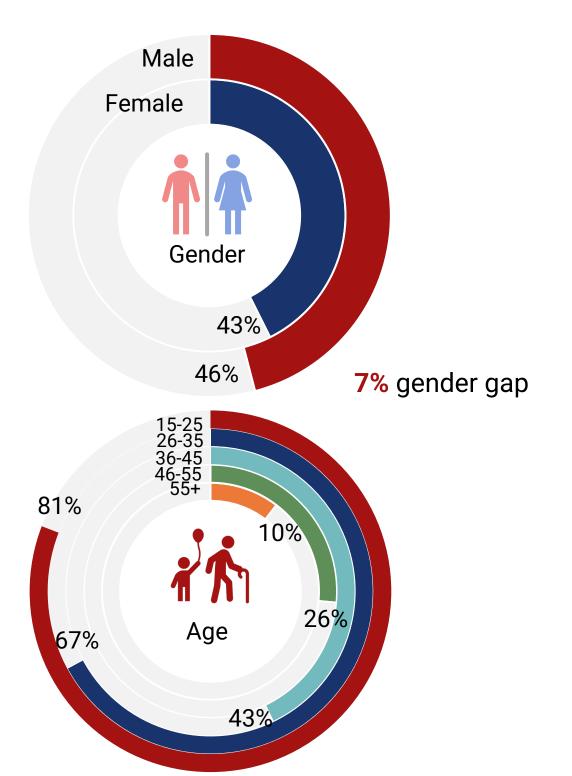
Q: Have you ever used the Internet? (Websites and applications like Google, Facebook, WhatsApp, email, etc.)

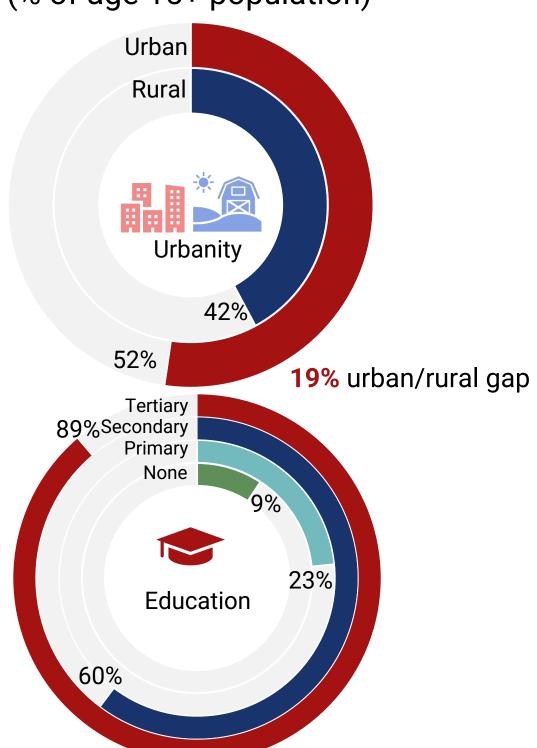
### Internet use lower among the poor, less educated, elderly, rural, unemployed and women

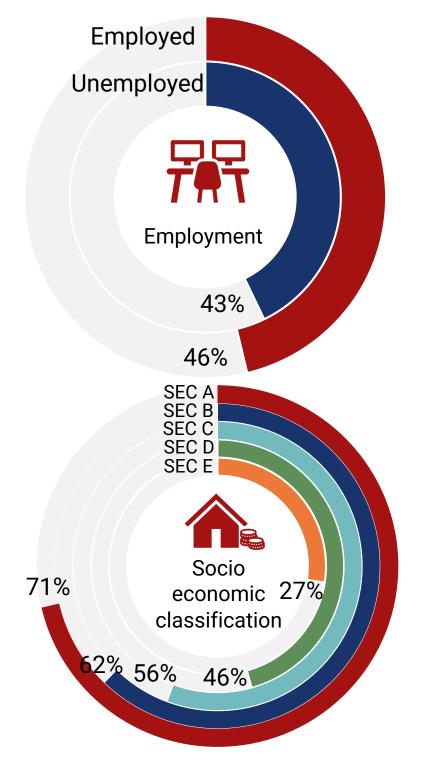




(% of age 15+ population)

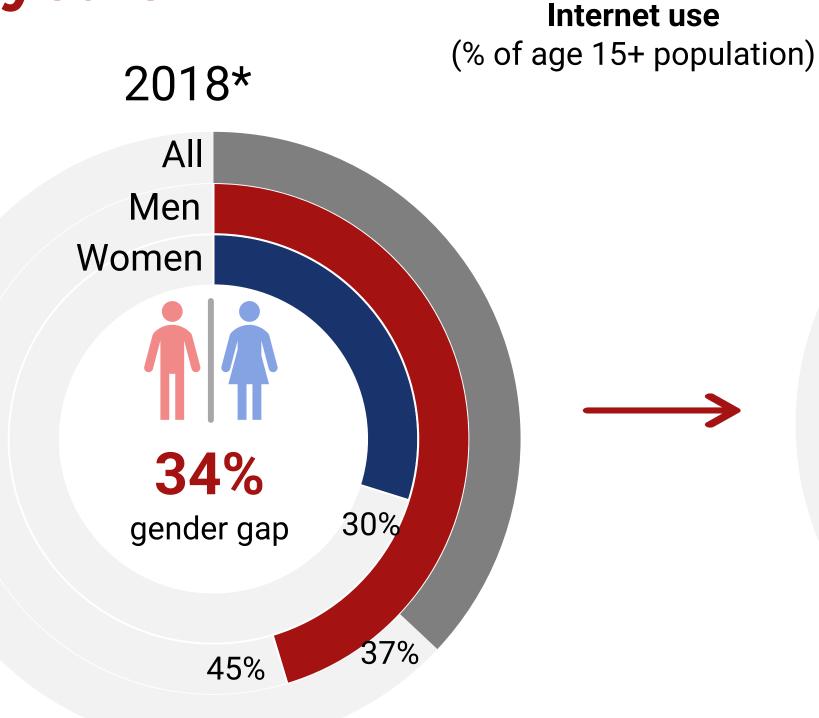


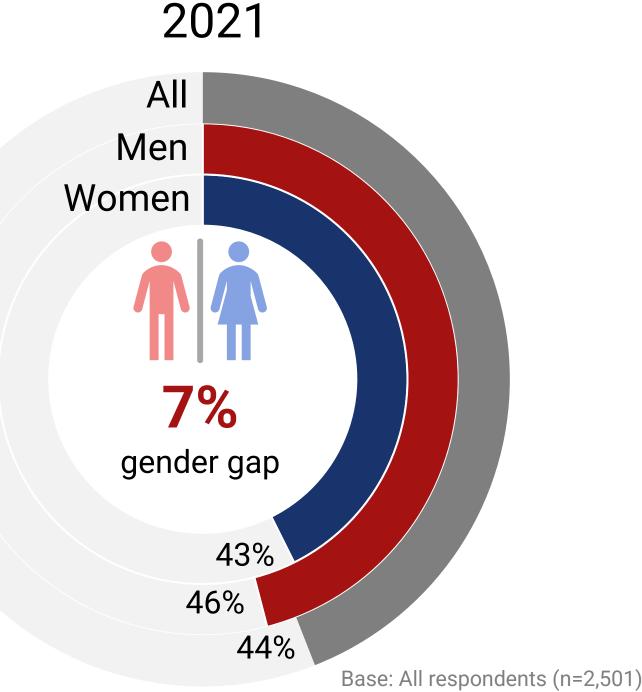






Gaps are reducing -- gender gap fell from 34% to 7% over 4 years

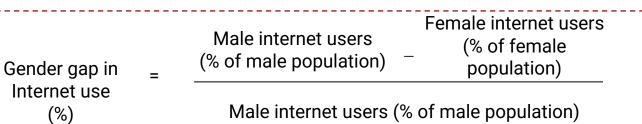




\* for the ages of 15-65 population

Q: Have you ever used the Internet? (Websites and applications like Google, Facebook, WhatsApp, email, etc.)

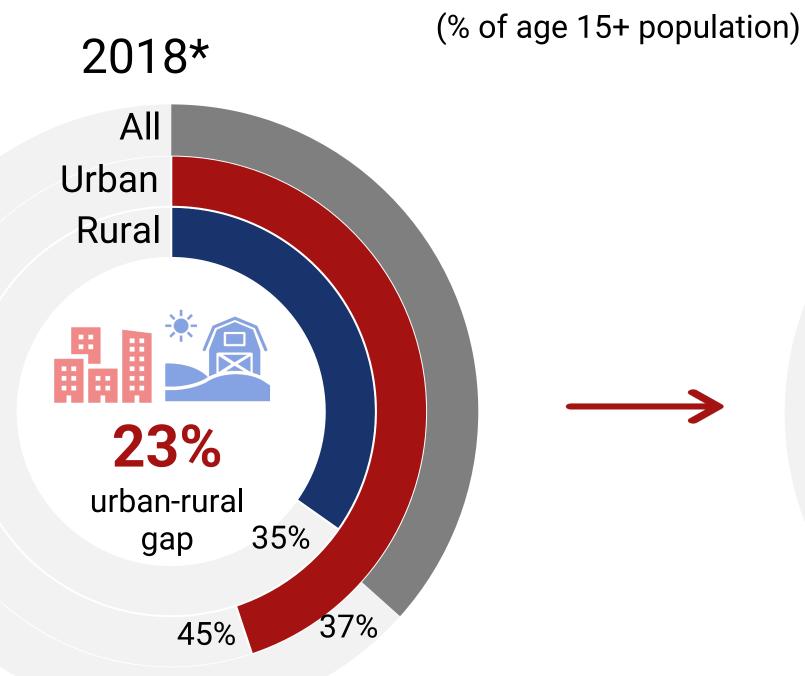
Base: All respondents (n=2,017)

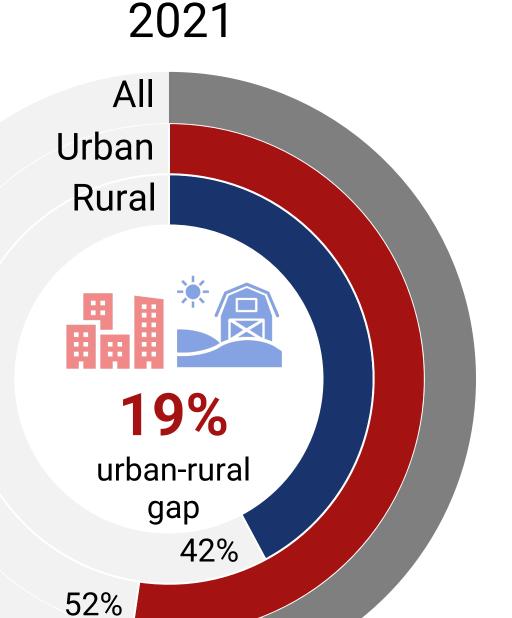




### But some other gaps (e.g.: urban-rural) remained

#### **Internet** use





Base: All respondents (n=2,501)

\* for the ages of 15-65 population

Q: Have you ever used the Internet? (Websites and applications like Google, Facebook, WhatsApp, email, etc.)

Base: All respondents (n=2,017)

Urban-rural
gap in Internet users
use (%)

Urban internet users
(% of urban population) — (% of rural population)

Urban internet users (% of urban population)

44%



### But 2.2 million households and over 9.2 million individuals were still unconnected

of households did not have an active internet connection

3.9 m households 2.2 m households

of 15 + population were not internet users



7.3 m individuals

9.2 m individuals

Q2: Have you ever used the Internet? (Websites and applications like Google, Facebook, WhatsApp, email, etc.)

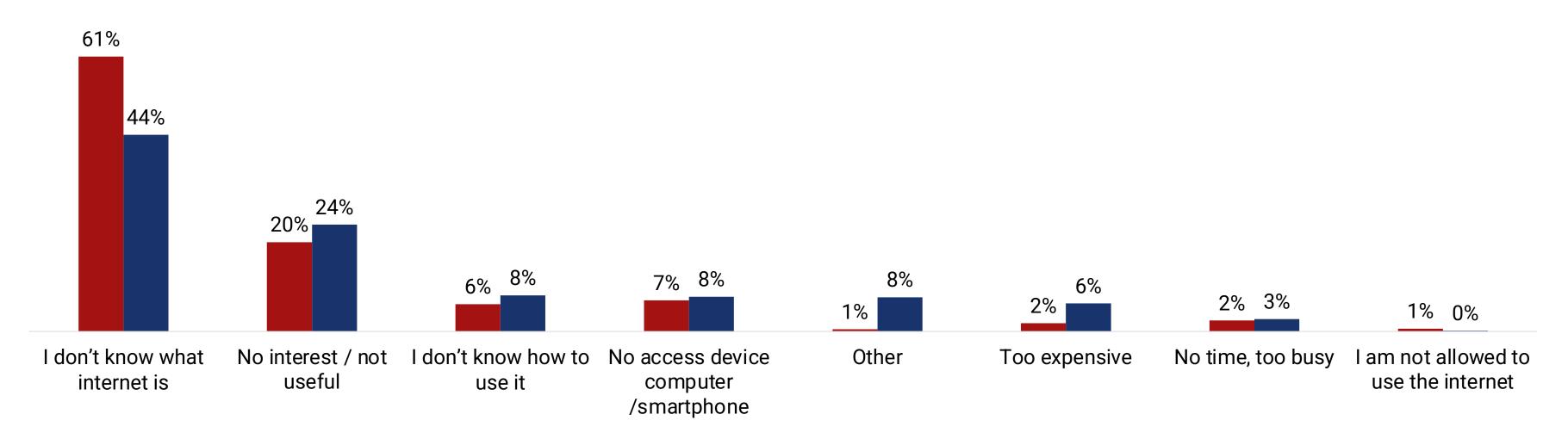
Q1: Does this household have a working Internet connection, if so what type? (one that is exclusive for the household and is accessible to all household members)

### Lack of awareness remains a key challenge to nonuse, but non-users are increasingly citing skills, access to devices and cost as constraints to use

#### Main reason for non-use

(% of age 15+ non internet users)

**■** 2018\* **■** 2021

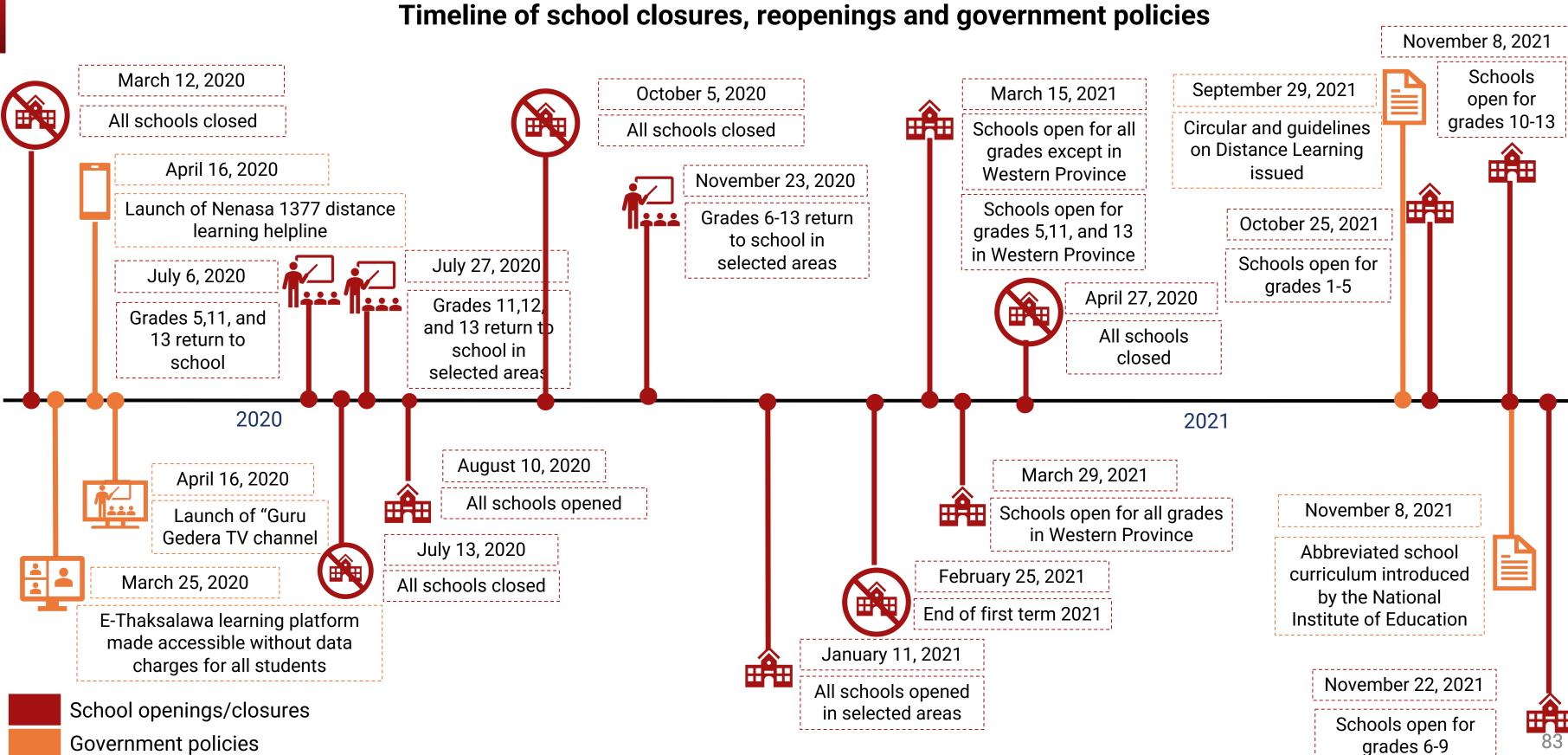




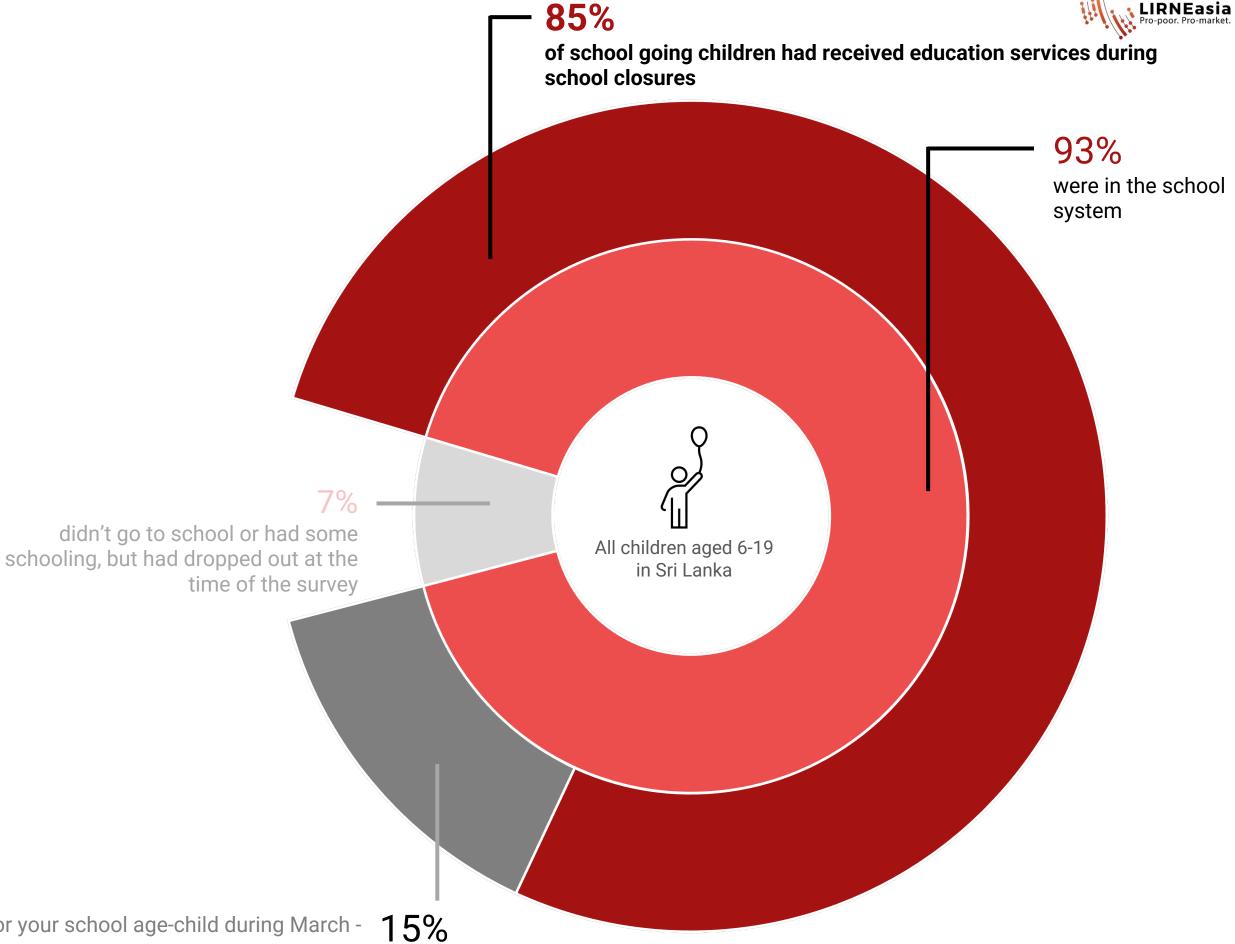


### Education

## COVID-19 led to unforeseen school closures, necessitating new policies and programmes to be launched



85% of school going children had received education services during school closures between March and July 2020



Q: Did you receive any of the following education services for your school age-child during March - July period when schools were closed?

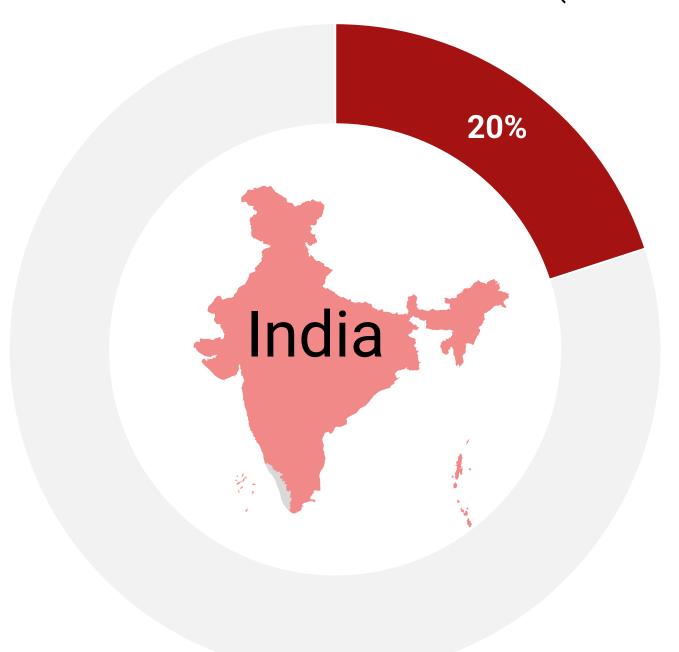
Base: School aged children (n=1,963)

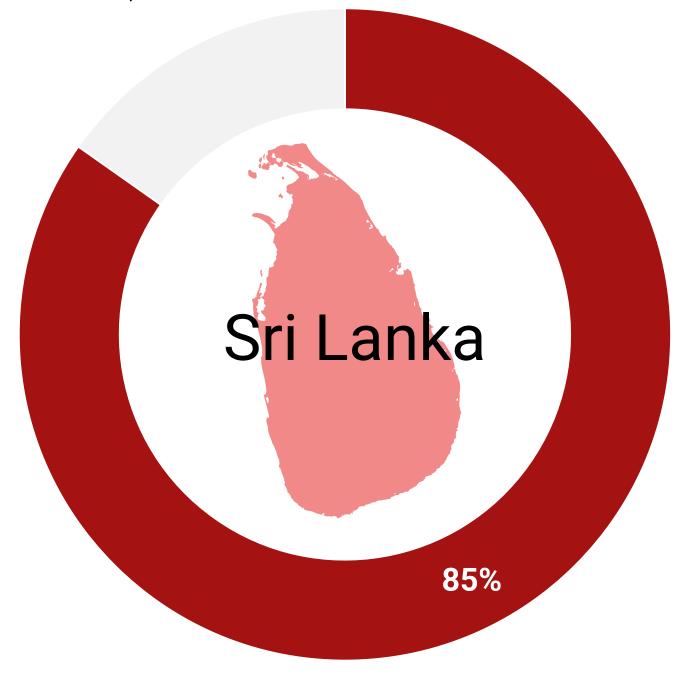
## Sri Lanka greatly outperformed India in access to education during school closures



#### **Education during the lockdown**

(% of enrolled school-aged children)



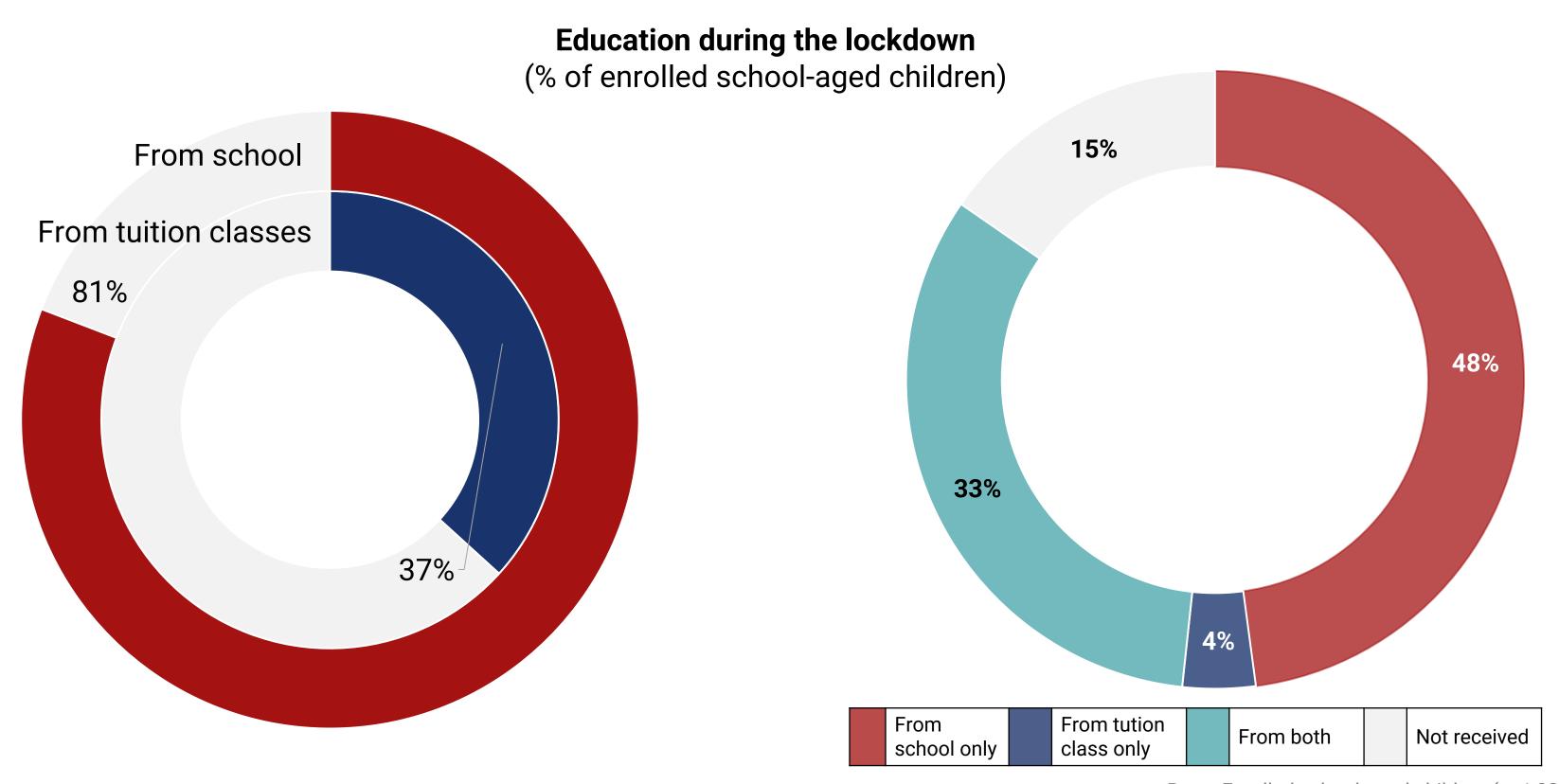


India: When schools were closed due to COVID-19, did any child in the household receive any educational services from the school they attended or from the tuition providers?

Sri Lanka: Did you receive any of the following education services for your school age-child during March -July period when schools were closed?

Base: Enrolled school-aged children(India n = 6,716)(Sri Lanka: n=1,809)86

### 81% of the students received remote education from school; 37% relied on tuition classes

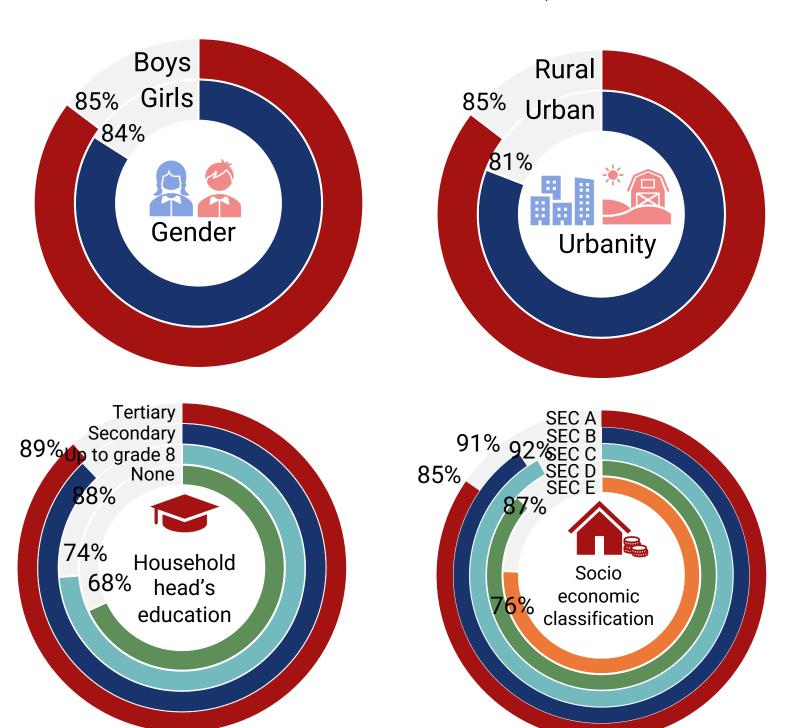


# Access to education was greater among children from households with more educated household heads, but age, gender and urban-rural gaps were minimal

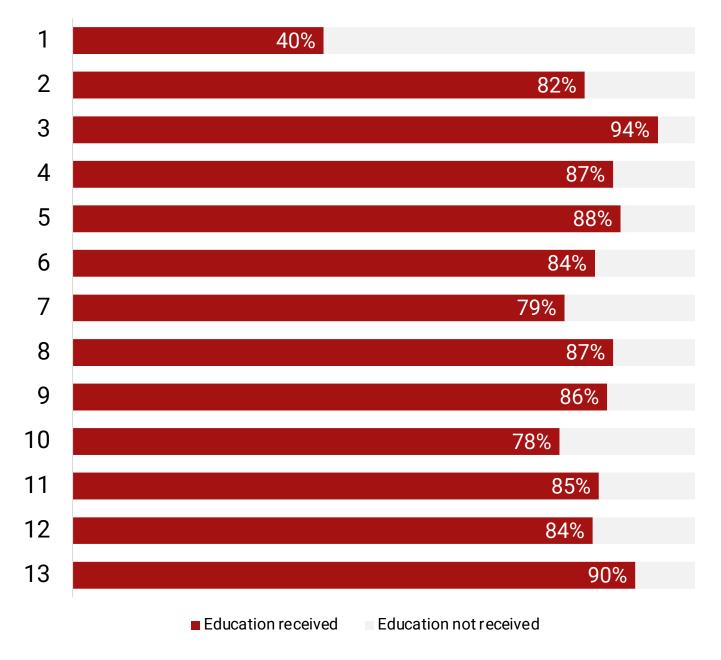


#### **Education during the lockdown**

(% of enrolled school-aged children)

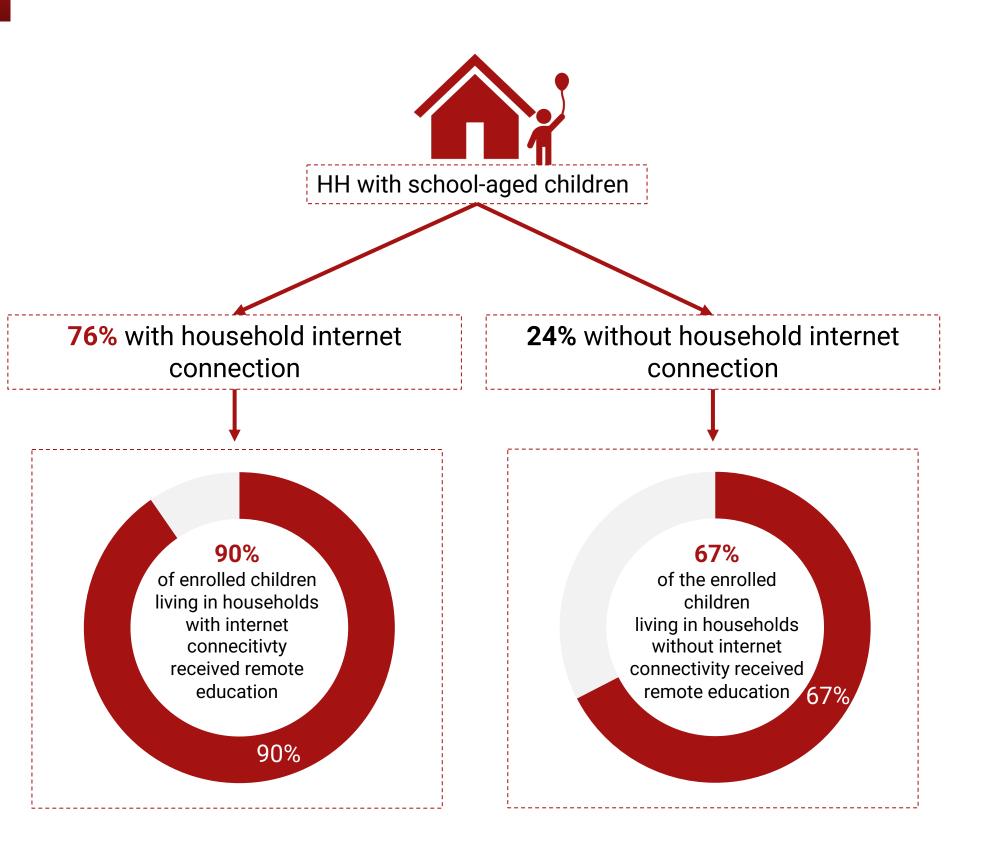


#### Grade of the student





### Internet connectivity was a key factor in facilitating remote education

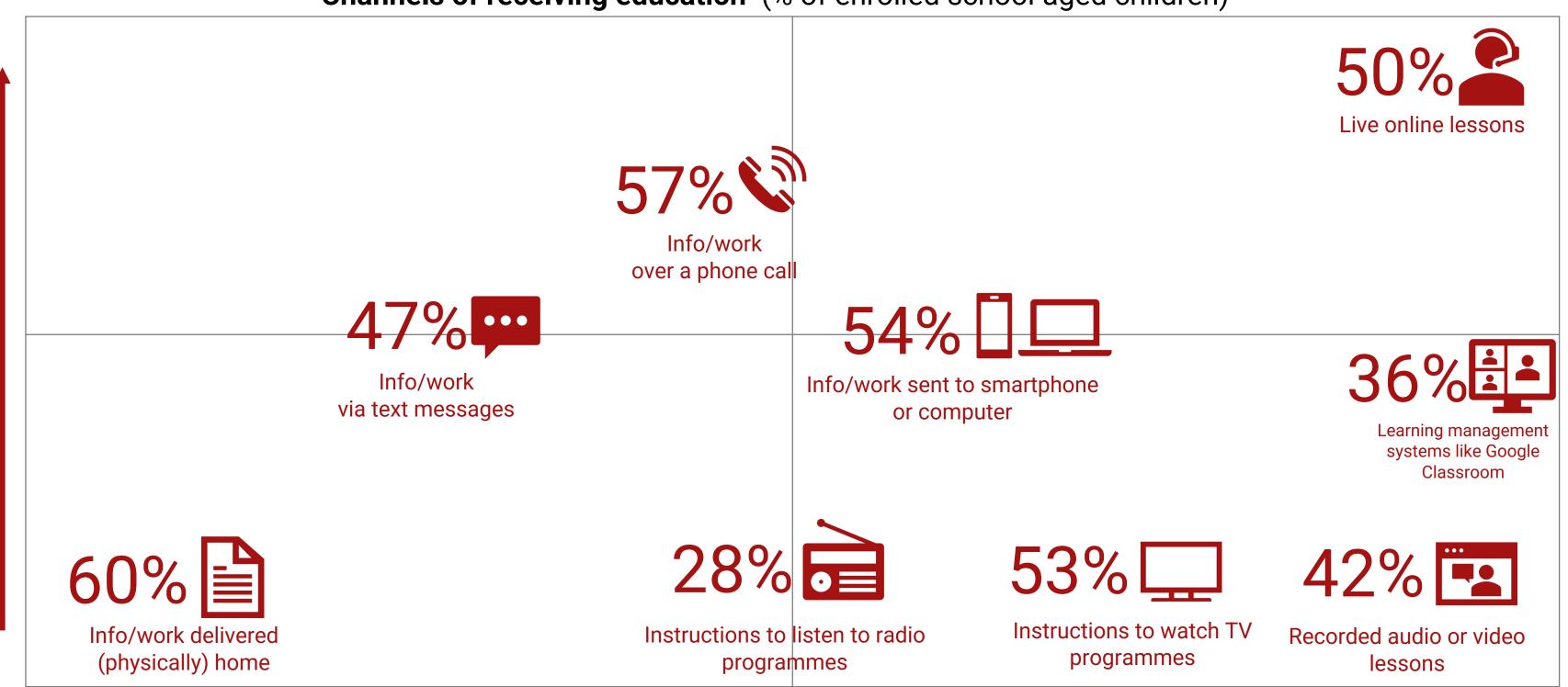


- Connected households more often:
  - Richer
  - Have more educated household heads
  - Have big-screen devices
- Unconnected households more often:
  - Poor
  - Have less educated household heads
  - Don't have big-screen devices



### Students' remote "learning" experience varied vastly

Channels of receiving education (% of enrolled school aged children)



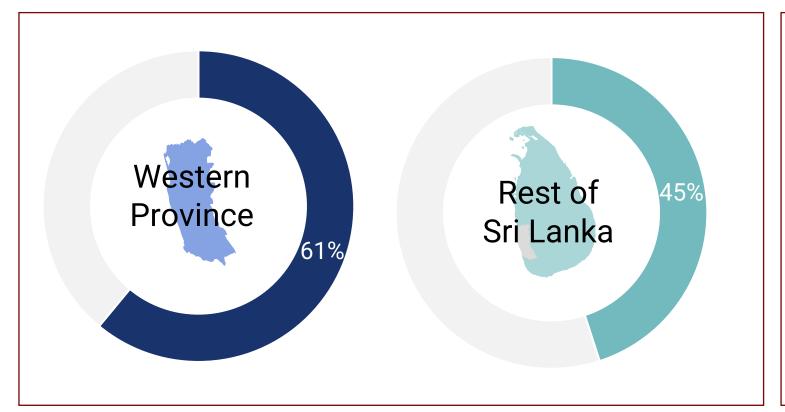


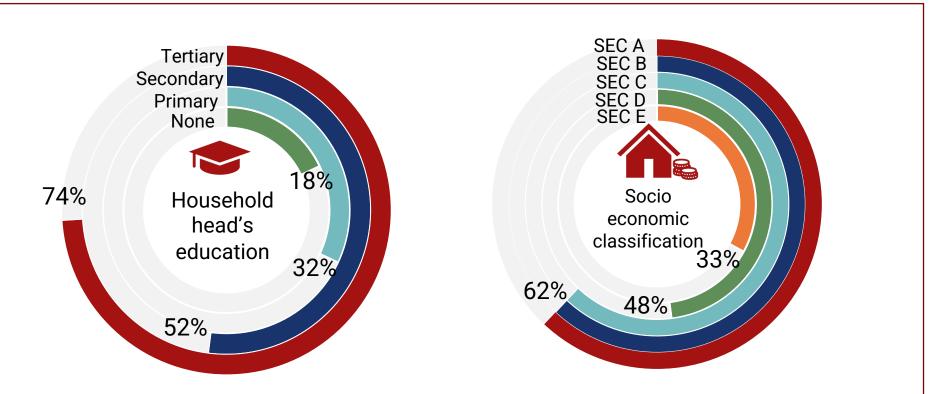
## Feedback is important for learning: not everyone got feedback during their remote learning experience



48%

of enrolled children during school closures received feedback from teachers



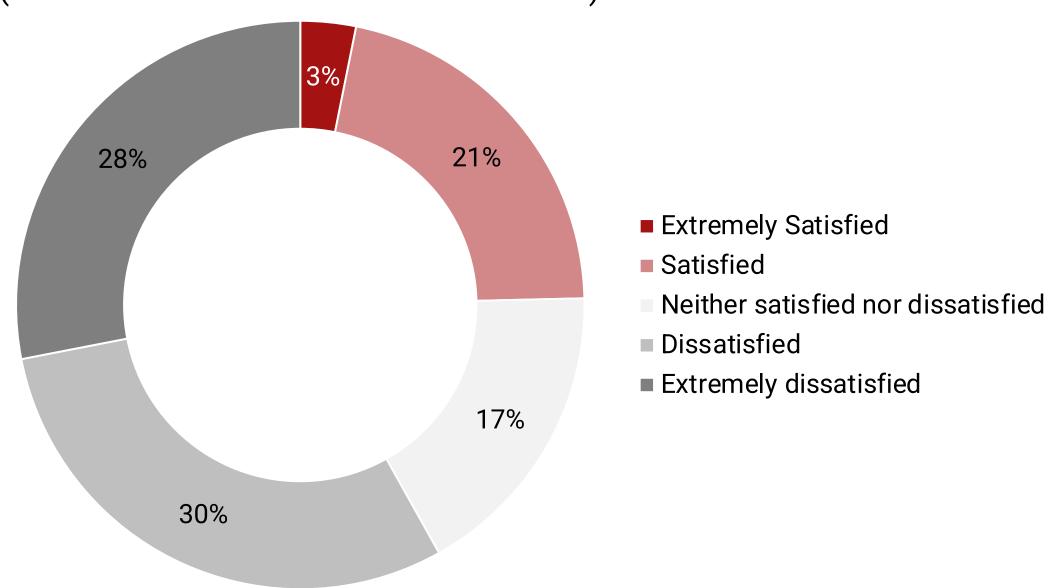




## Despite high access to remote education, over 58% of households were dissatisfied with their experience

#### Satisfaction with remote education

(% of households who received education)

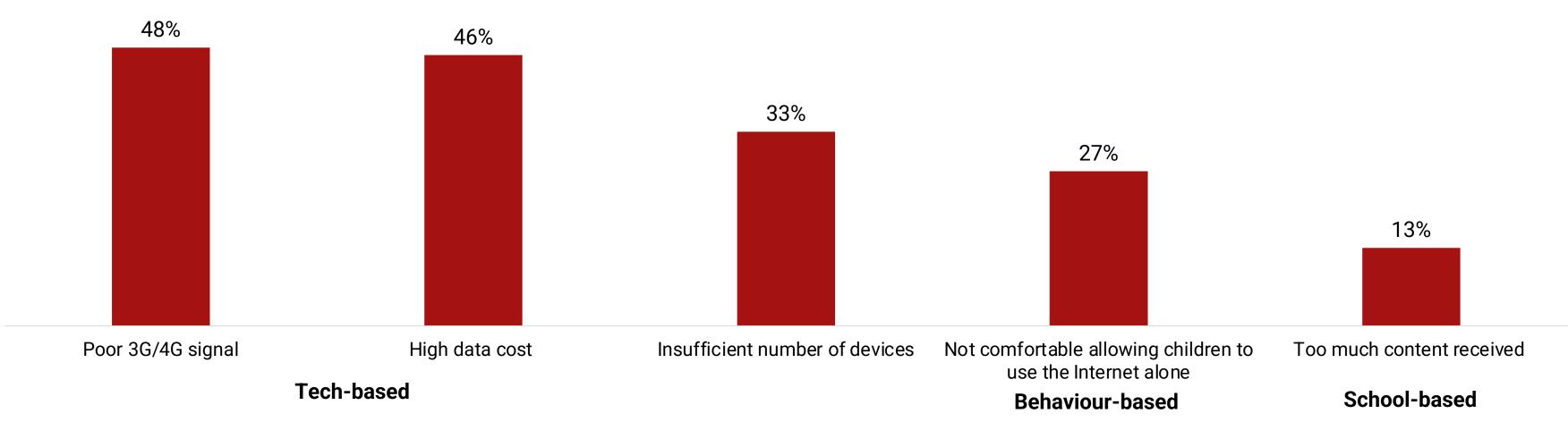




### Nearly half of households with students receiving education cited poor connectivity and high data costs as challenges around access to education

Difficulties with respect to education during the pandemic

(% of households with kids who received education)



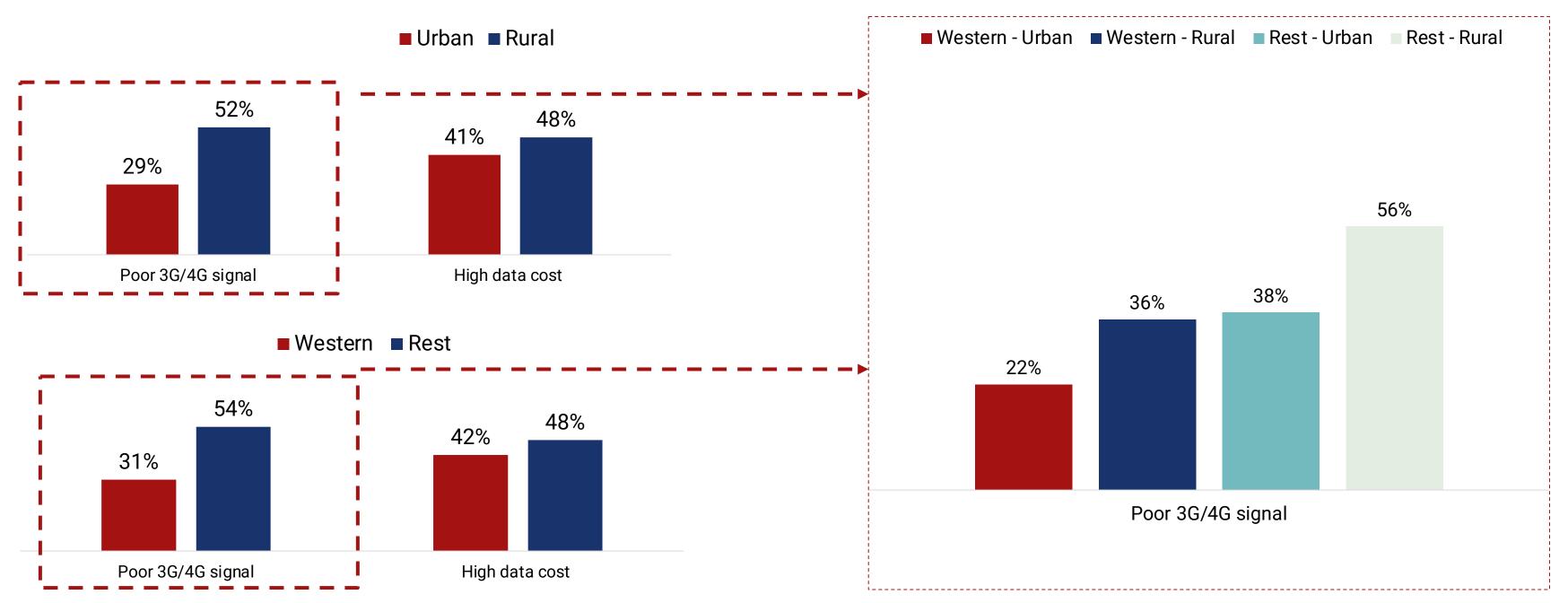
Q: Which statement is applicable for you with regards to the education of the children of this household during lockdown?



## Poor connectivity constraining education of those outside urban areas and the Western Province

#### Difficulties with respect to education during the pandemic

(% of households with kids who received education)



Q: Which statement is applicable for you with regards to the education of the children of this household during lockdown?



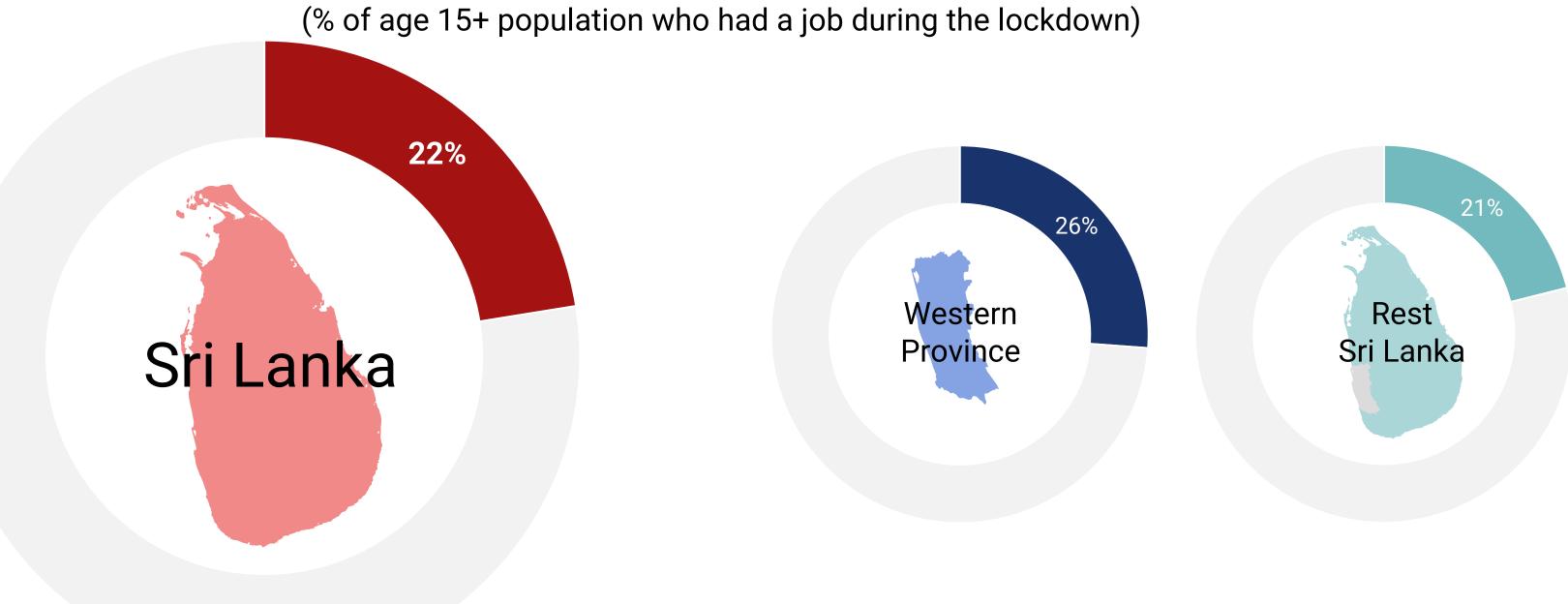


### Work

# 22% of those who had a job during the lockdown worked remotely



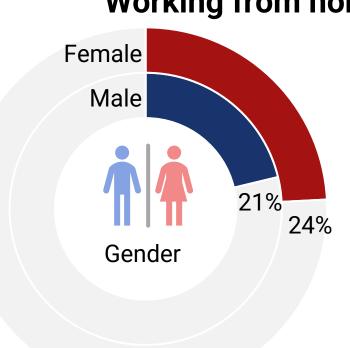


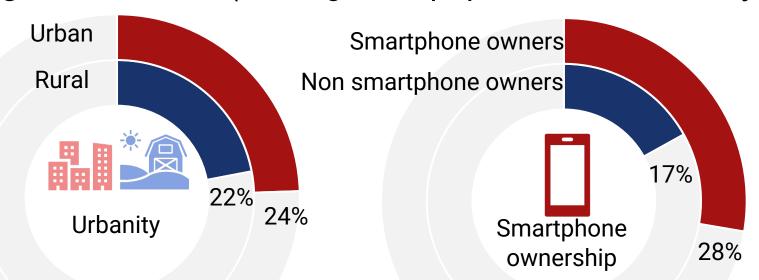


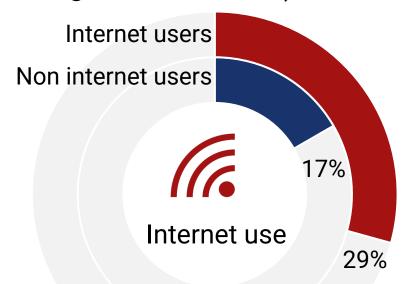


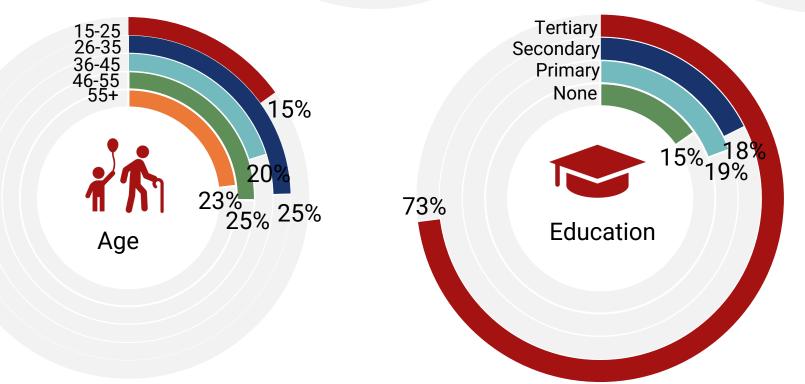
# Those who worked from home were more educated, and from a higher socio-economic background

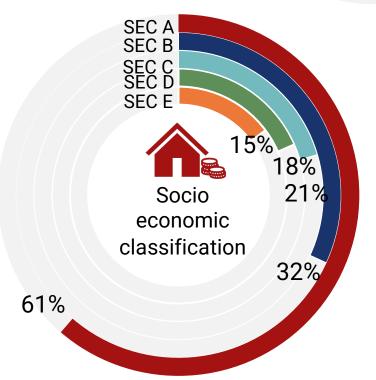
Working from home during the lockdown (% of age 15+ population who had a job during the lockdown)









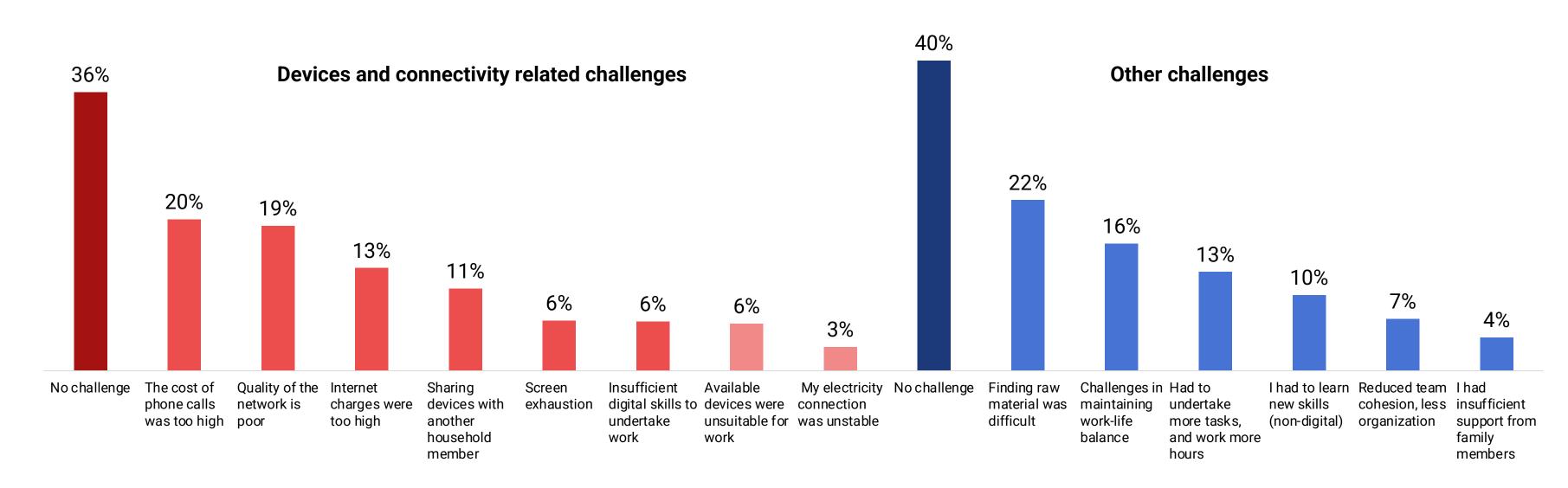






#### Challenges faced when engaging in remote work

(% of those who engaged in remote work during lockdown)



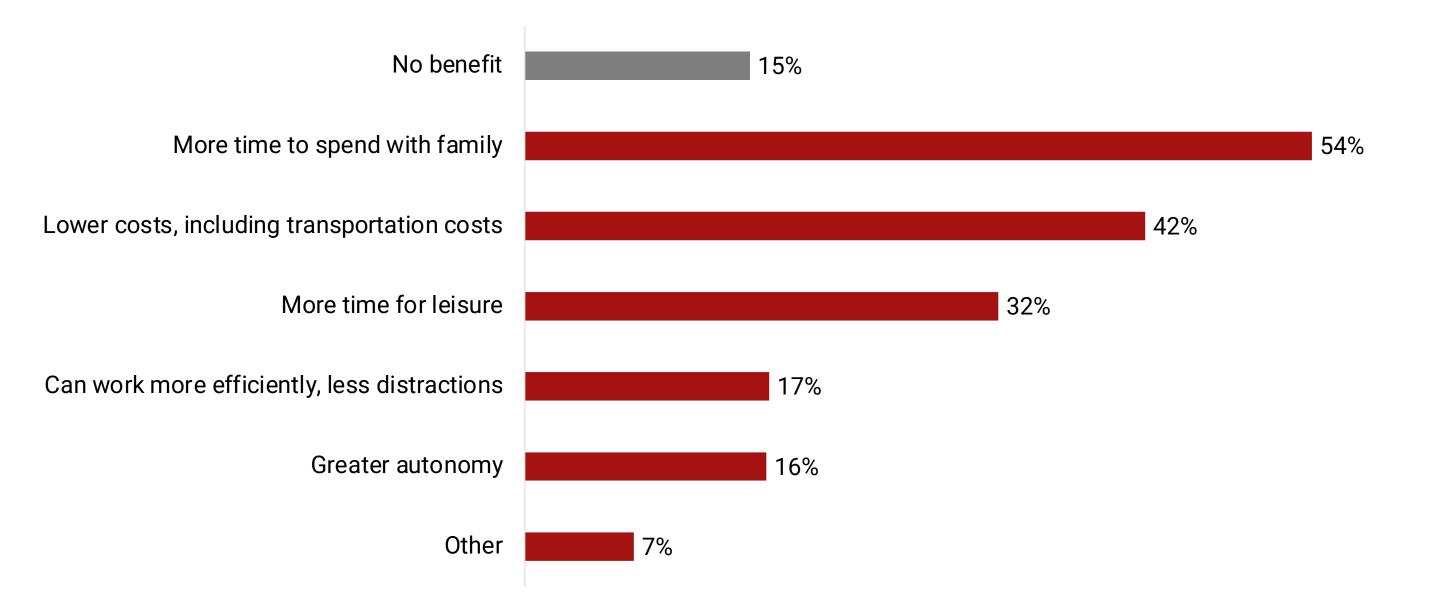
Q1: What are/were the challenges with regards to devices and connectivity you faced in engaging in remote work?

Q2: What were the other challenges that you faced in engaging in remote work?

# 54% stated that they were able to spend more time with family due to engaging in remote work

### Benefits experienced when engaging in remote work

(% of those who engaged in remote work during lockdown)



LIRNEasia

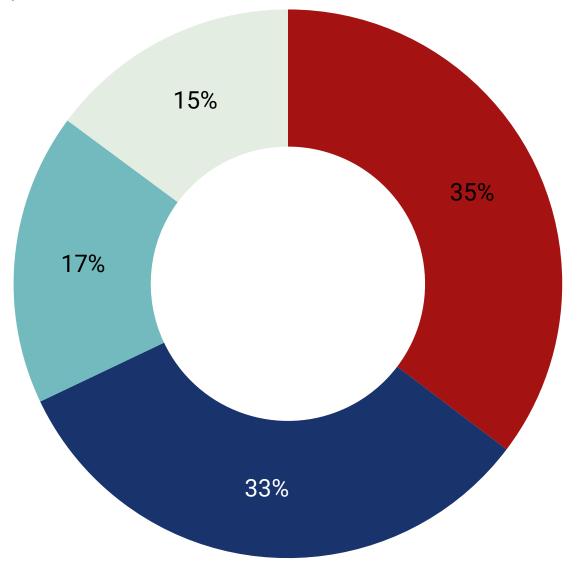


### Only 35% had returned to a workplace full time

### Returning to physical workplace post lockdown

(% of those who engaged in remote work during lockdown)

- Yes, I have returned to a physical workplace full-time
- I am no longer employed
- Yes, I have returned to a physical workplace, but only on select days/weeks or for select tasks, and do the rest at home
- I continue to work remotely full time







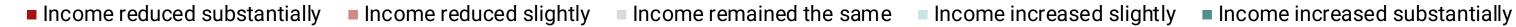
# Household income

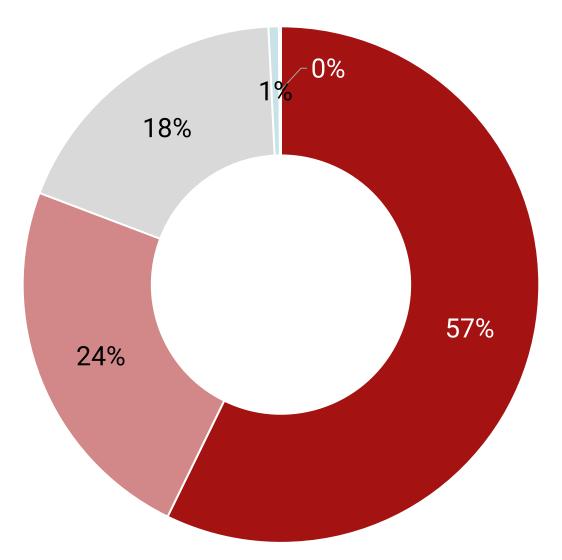


# Over 80% experienced income loss during the lockdown

### Monthly household income: Before the pandemic vs during lockdown

(% of all households)





Q1: Think about the entire monthly income of your household,
Think about the entire monthly income of your household, Please tell me by looking at this card, which statement is most applicable for the income of your household during the lockdown due to COVID-19 compared to before lockdown?

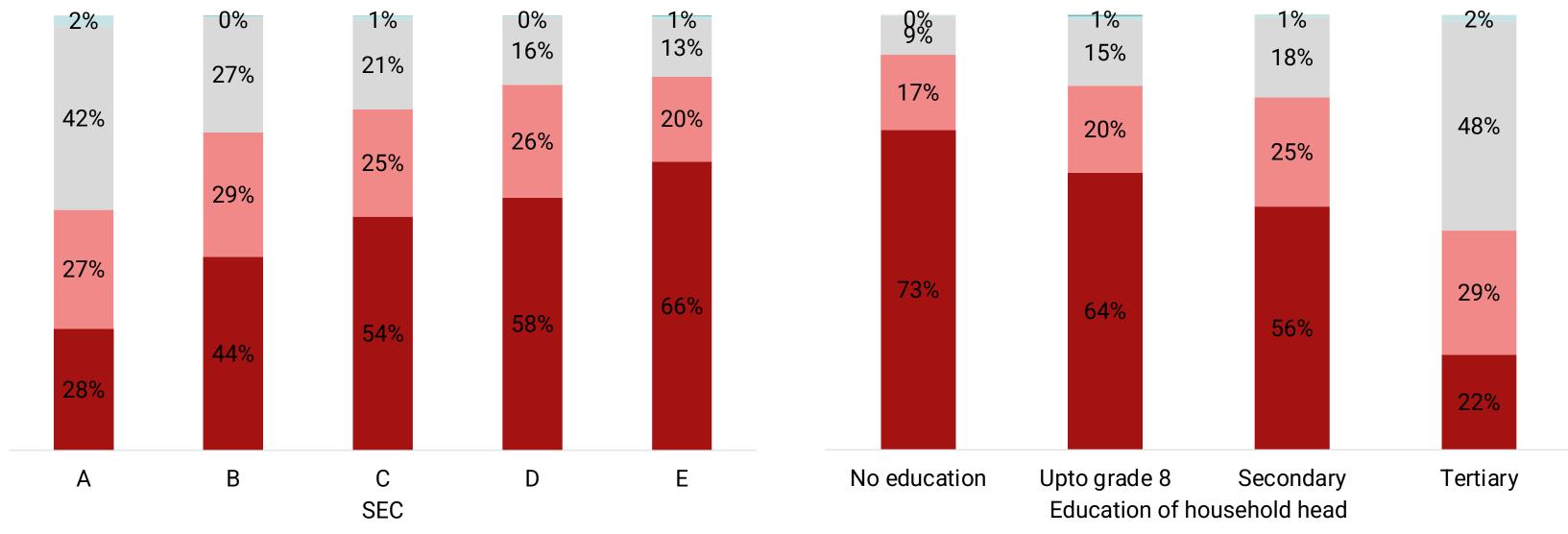
Base: All households (n=2,501)



# Poorer households with less educated household heads were most impacted

### Monthly household income: Before the pandemic vs during the severest lockdown

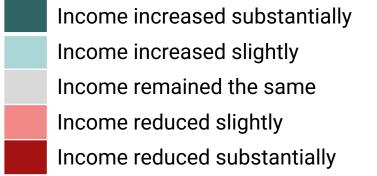
(% of all households whose income reduced substantially)



Q: Think about the entire monthly income of your household,

Please tell me by looking at this card, which statement is most applicable for the income of your household during your most severe lockdown period as compared to the period before COVID 19.

Base: All households





# Incomes at the time of survey implementation were below pre-pandemic levels in 74% of households

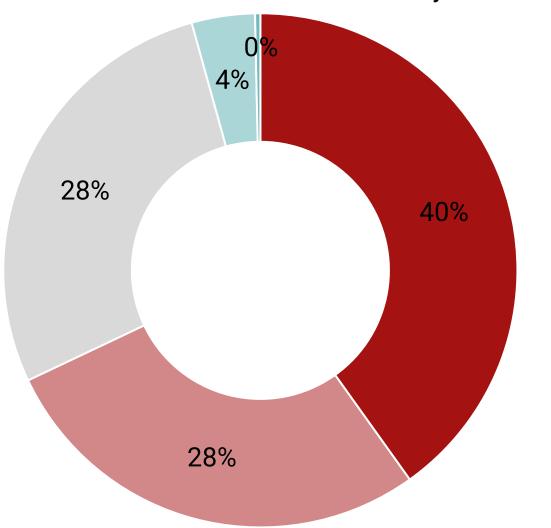
### Monthly household income: Before the pandemic vs during the survey 2021

(% of all households)

- Income reduced substantially
- Income increased slightly

- Income reduced slightly
- Income increased substantially











## Most accessed food and groceries through local grocery shops and mobile vendors; only 2% of households used online platforms

### Methods used to access food and grocery during lockdown

(% of households)



Recived as aid







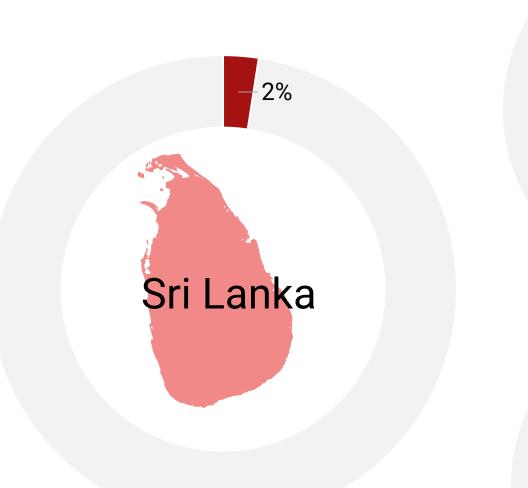


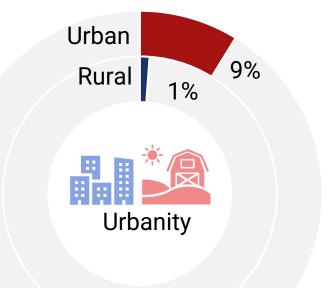


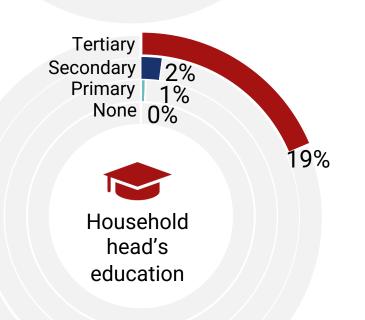
Households using online platforms were predominantly in the Western Province, urban, wealthy, with more educated household heads

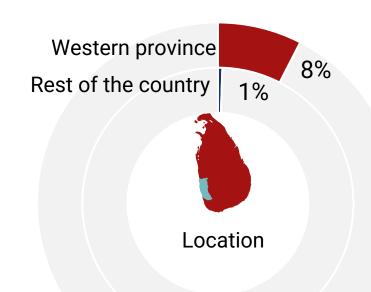
**Obtaining food via online platforms** 

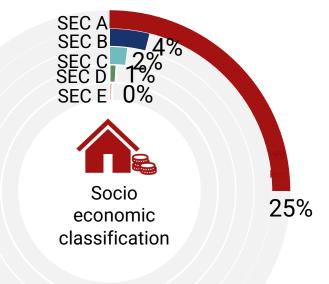
(% of households)







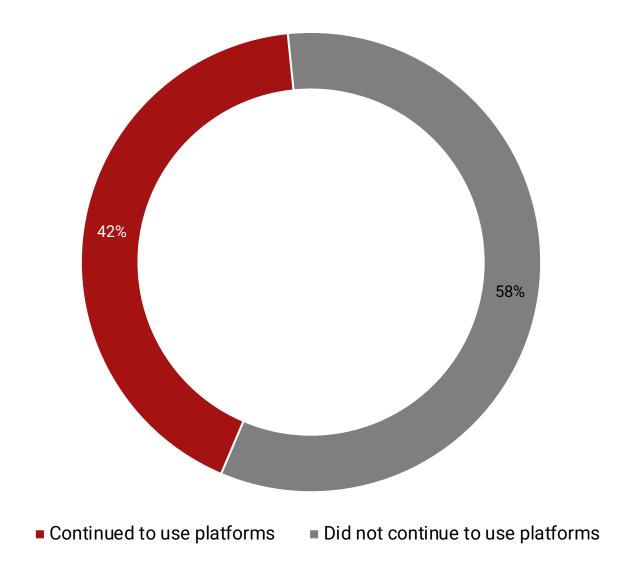




# 58% of platform users during lockdown did not use them after – most cited the lack of need as a reason for not doing so

#### Use of platforms after the lockdown

(% of households who used online platforms for food delivery during the lockdown)



### Reason for not continuing to use online platforms for food delivery (% of households did not continue to use online platforms for food delivery)







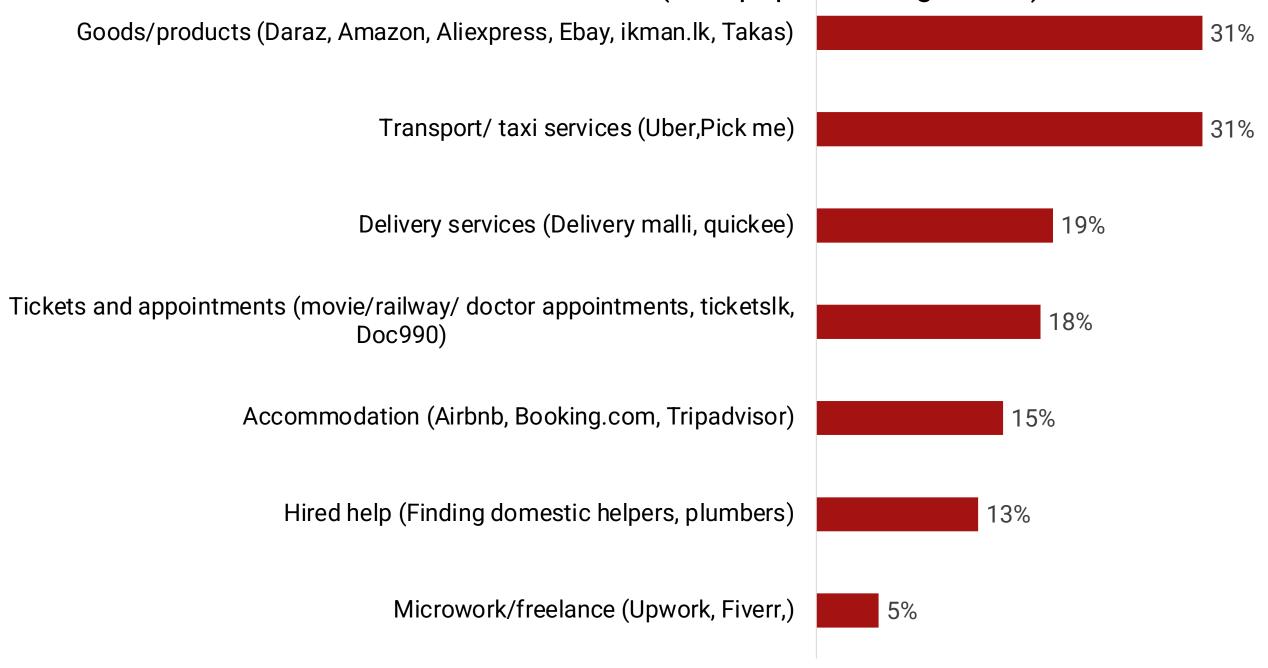
### Platform use



# 31% were aware of platforms selling goods/products, and providing transport and taxi services

### Awareness of internet platforms and applications

(% of population aged 15+)





### Awareness did not always translate to use

### Awareness and use of platforms and applications to buy and sell goods or services

(% of age 15+ population)

	Awareness	Use
Platform	All time	During lockdown
Goods/products (Daraz, Amazon, Aliexpress, Ebay, ikman.lk, Takas)	31%	3.0%
Transport/ taxi services (Uber,Pickme etc.)	31%	3.2%
Delivery services (DTDC, Fastrack)	19%	1.2%
Tickets and appointments (ticketslk, Doc990)	18%	0.4%
Accommodation (Airbnb, Goibibo, Booking.com, Tripadvisor)	15%	0.1%
Hired help (Finding domestic helpers) e.g. Urban Company	13%	0.2%
Microwork/freelance (Upwork, Fiverr)	5%	0.0%

Q1: Have you heard of Internet platforms or applications being available to buy and sell goods in the following areas?

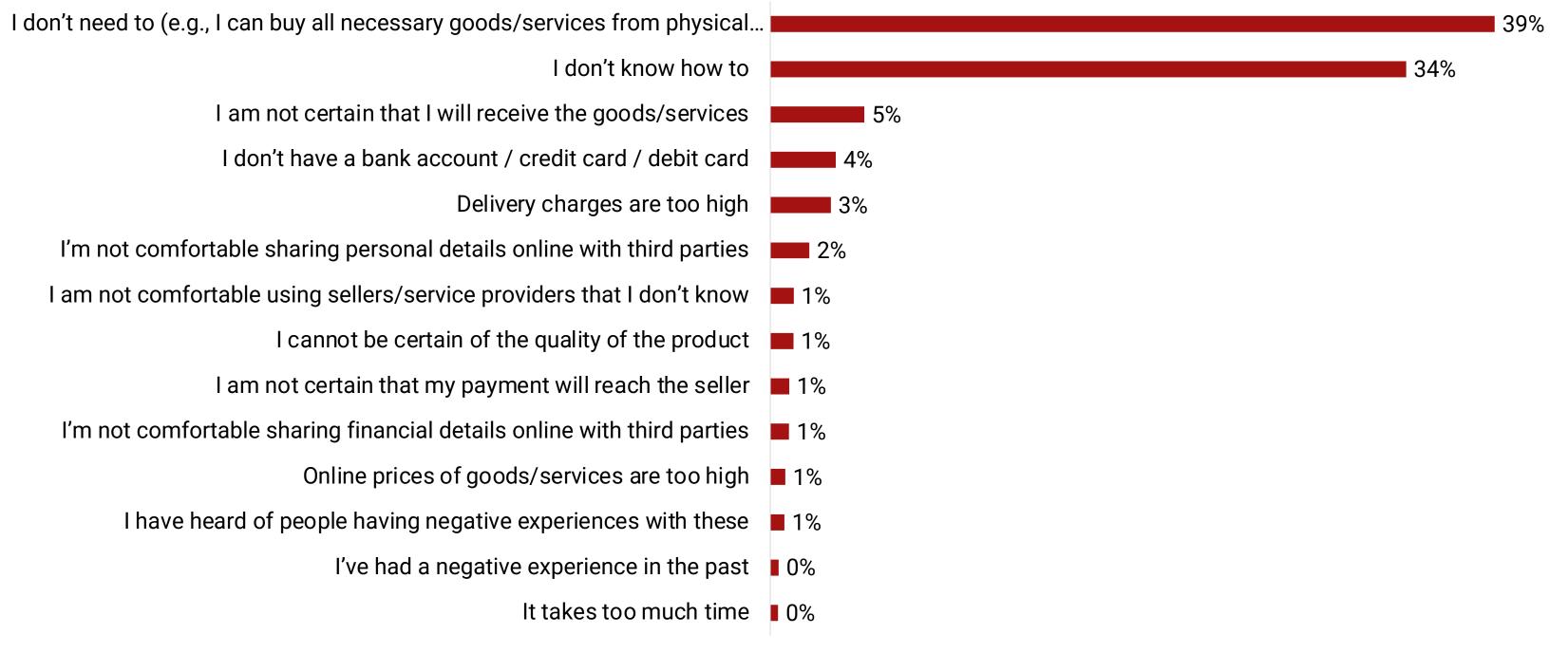
Q2: Have you used Internet platforms/apps to buy goods or services of the following types?



# 39% cited the lack of knowledge about platforms as the reason for non-use

### Reasons for not using internet platforms and applications to buy goods or services

(% of those who have not used internet platforms and applications)







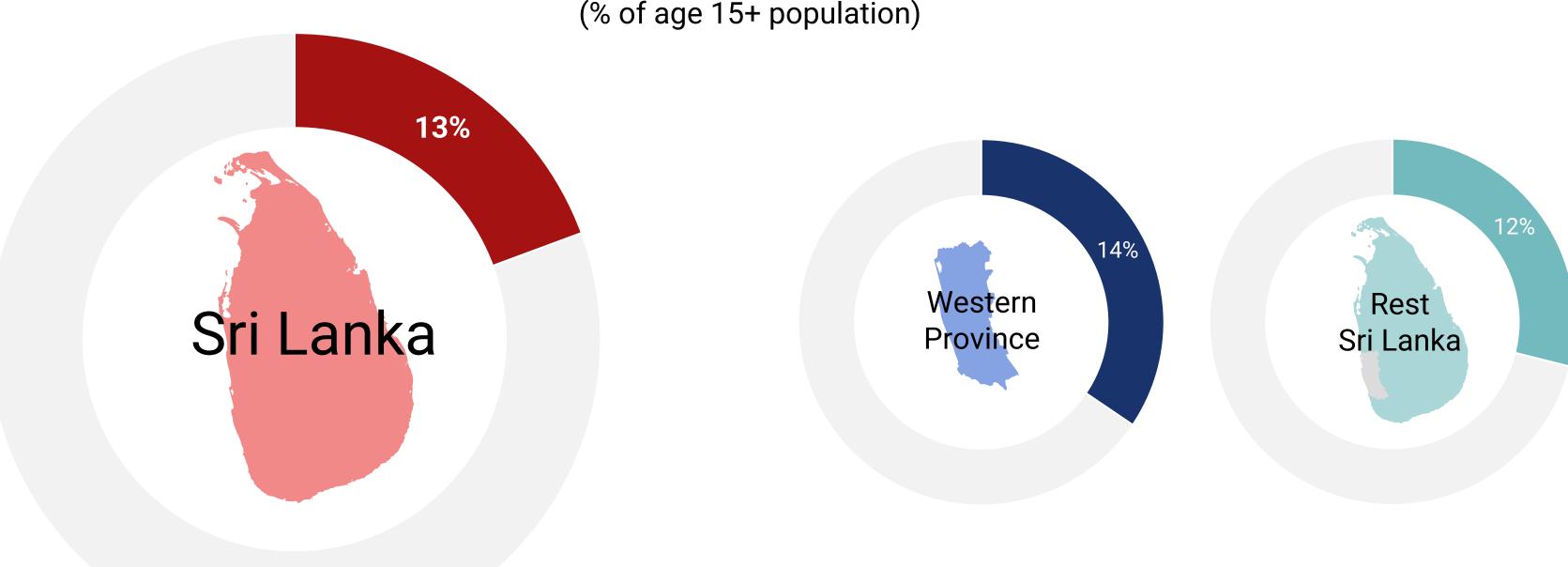
## Digital government



### 13% of the population accessed government websites

### **Government website access**

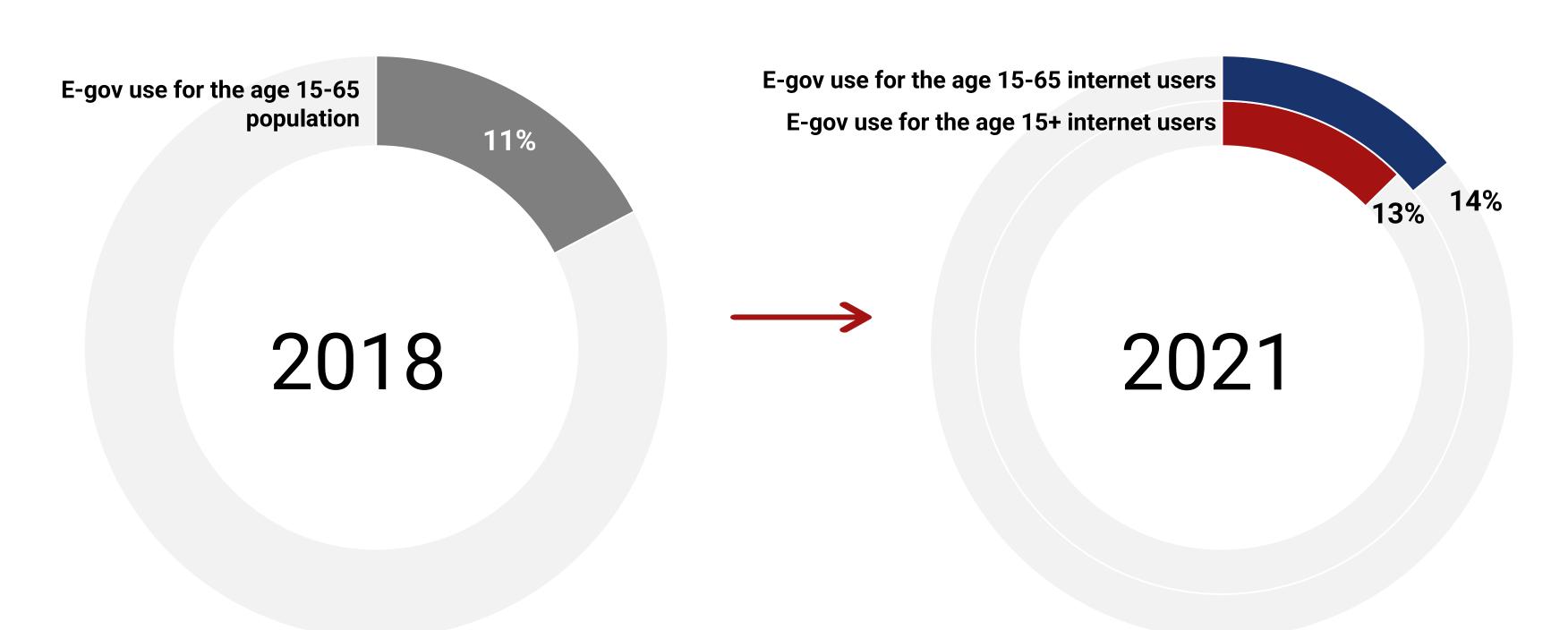
(% of age 15+ population)



Q: Do you use the internet to access government websites? ("government websites" may include central, provincial and local government institutions offices, ministerial, tax office, police office, state-owned health facilities, state-owned public facilities (such as the airports, toll-way, etc) and any other government-related institutions)



# Marginal growth in access to government websites since 2018

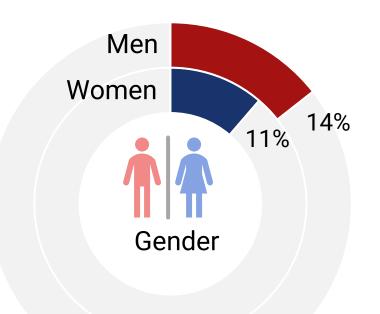


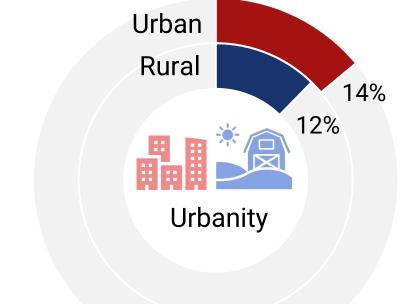
#### LIRNEasia Pro-poor. Pro-market.

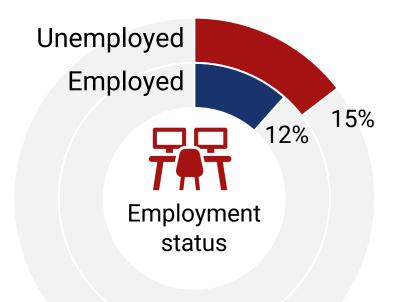
## Younger, more educated populations from higher socio-economic groups accessed government websites

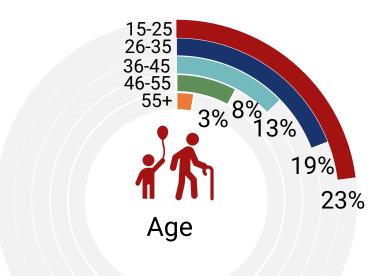
#### **Government website access**

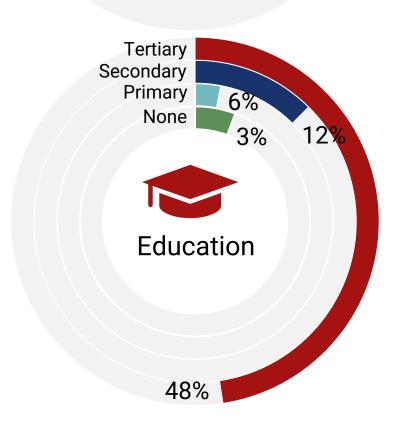
(% of age 15+ population)

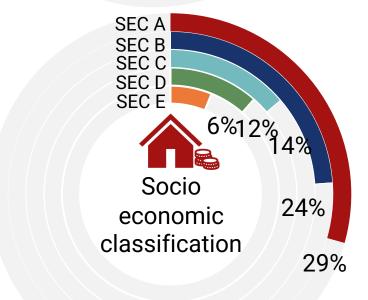




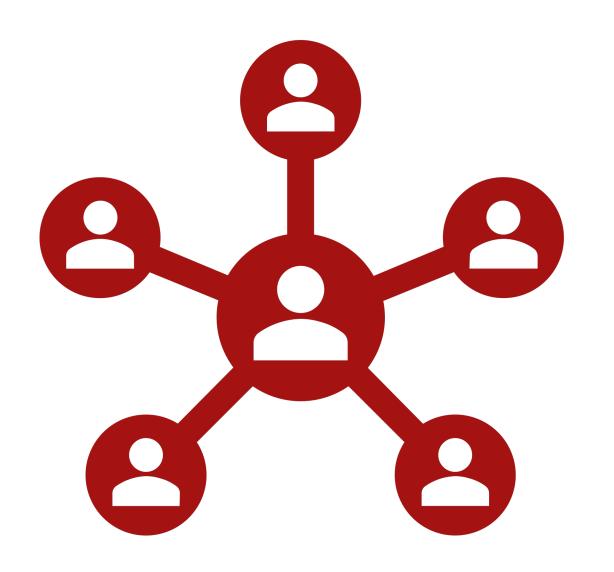










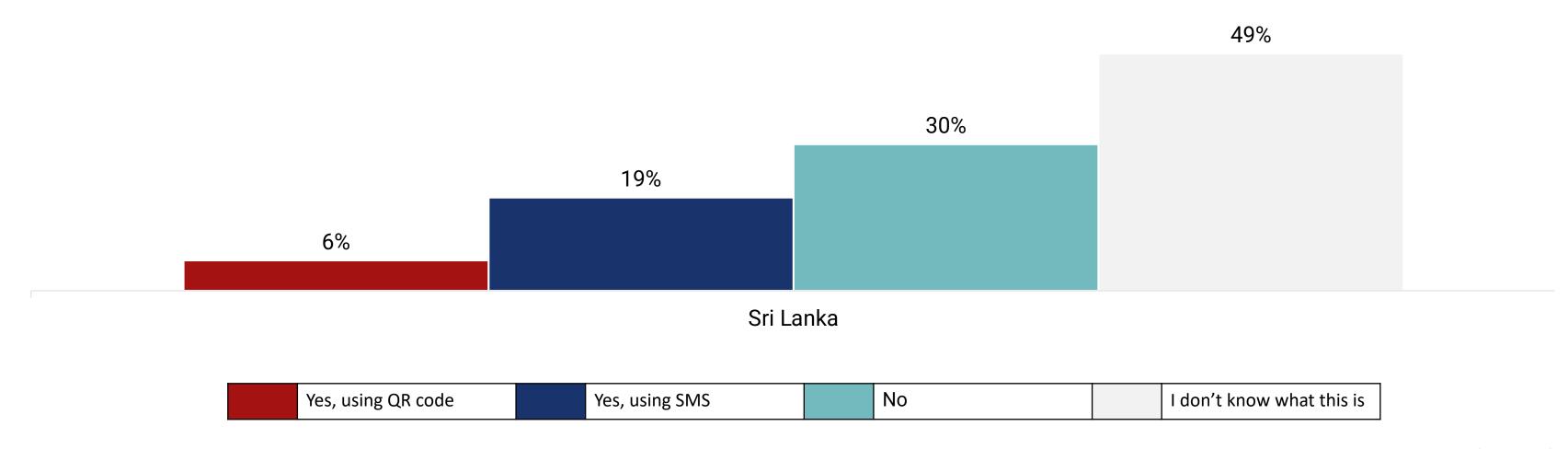


# Contact tracing

# 22% of mobile owners used mobile based check in systems; nearly 50% were lacked knowledge about such mechanisms

### Use of mobile phone-based contact tracing mechanisms

(% of age 15 + mobile phone owners)





For more information www.lirneasia.net