

AFTER ACCESS

THE INSIDE INTERNET STORY OF AFRICA, ASIA AND LATIN AMERICA

MOBILE AND INTERNET USE IN THE GLOBAL SOUTH HAS NO 'ONE-SIZE-FITS-ALL' APPROACH



#AfterAccess

A new demand-side body of research on mobile phone and internet access and use in the public domain



The Sample

Over 17,000 face-to-face interviews covering 26% of the Global South population in 16 countries across Asia, Africa and Latin America. Asia captures insights for the population group 15-65 while Africa and Latin America Capture for 15 and above.



Why was the research done? To gather strong evidence for policy-makers and regulators

IN SUMMARY

Regional and cross-regional comparisons are useful, especially with more similar conditions in emerging economies across the regions than within regions in some country cases. But analysis of outcomes in the local political and economic context is critical to identifying effective strategies to reduce digital inequality. Avoiding a 'one-size-fits-all' strategy for Internet, mobile device and mobile money policy will be key if the opportunity presented by these technologies is to be capitalised on by the Global South.

THE #AFTERACCESS SURVEYS NOW INCLUDE THESE COUNTRIES

- Lesotho*
- Uganda
- Senegal
- Sri Lanka
- Nepal
- Ecuador



Social media is a significant driver of Internet use in Latin America, Asia and Africa

*Lesotho was the initial After Access pilot survey undertaken in 2016 with the support of ITU and Lesotho Communications Authority

OTHER ISSUES IDENTIFIED

- E-commerce engagement is extremely low, particularly in Asia
- Incidence of microwork is negligible in the African countries surveyed outside of Kenya, Nigeria and South Africa
- An unstable or non-existent power supply prevents large parts of the developing world from engaging in Internet-based education or business

RECOMMENDATIONS

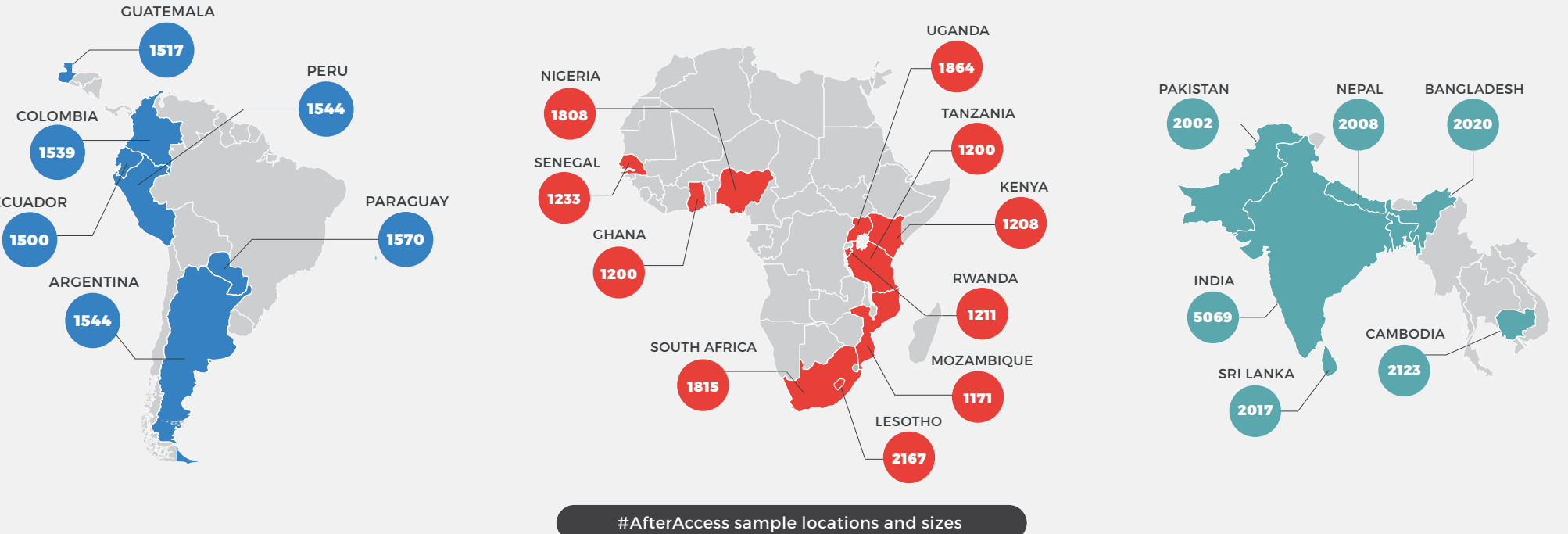
- Complementary access (public Wi-Fi)
- Extensive price reductions
- Strategies for stimulating Internet take-up alongside top-down supply-side strategies
- Development of relevant content
- Meaningful support of indigenous start-ups and apps developers

WATCH THIS SPACE FOR MORE

- Gender
- Youth
- Urban poor
- The future of work

ABOUT #AFTERACCESS

Nationally representative surveys of ICT access and use by households and individuals in the public domain in 16 developing countries of the Global South



“The quality and richness of what’s in [the #AfterAccess research] means they should be widely read and should have considerable potential impact. If policymakers are to make effective use of ICTs they need to know what’s actually happening in their societies, rather than relying on a mix of old or unreliable data, hype and glib assumptions. They need surveys like these and they need to take account of what they say.”

DAVID SOUTER, MANAGING DIRECTOR, ICT DEVELOPMENT ASSOCIATES



THE FINDINGS

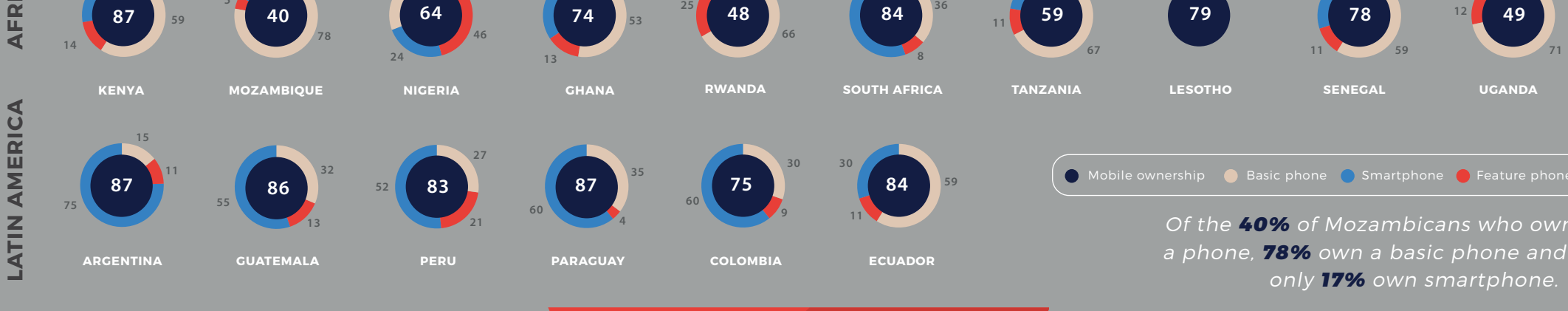
Two-thirds of the population in Bangladesh have never heard of the Internet, although 72% have a mobile phone. In five of the seven African countries surveyed more than half of the population still use a basic mobile phone. In Latin America, while Internet and smartphone penetration is high, there are still important gender and urban-rural gaps.

The social, political, economic and developmental factors at play in these regions are complex. It is clear that a 'one-size-fits-all' global strategy and blanket policymaking for connectivity will not be successful.

MOBILE INSIGHTS

1. MOBILE OWNERSHIP AND INTERNET CONNECTIVITY IN AFRICA, ASIA AND LATIN AMERICA ARE WORLDS APART

Many people now own mobile phones, but just owning a mobile phone is not enough. Mobile penetration is relatively high across all three regions, but more than half of the respondents in five out of seven African countries use a basic phone with no Internet connectivity. In Latin America, on the other hand, there is relatively high smartphone ownership or featured phones with Internet connectivity. There are also significant variations within regions.

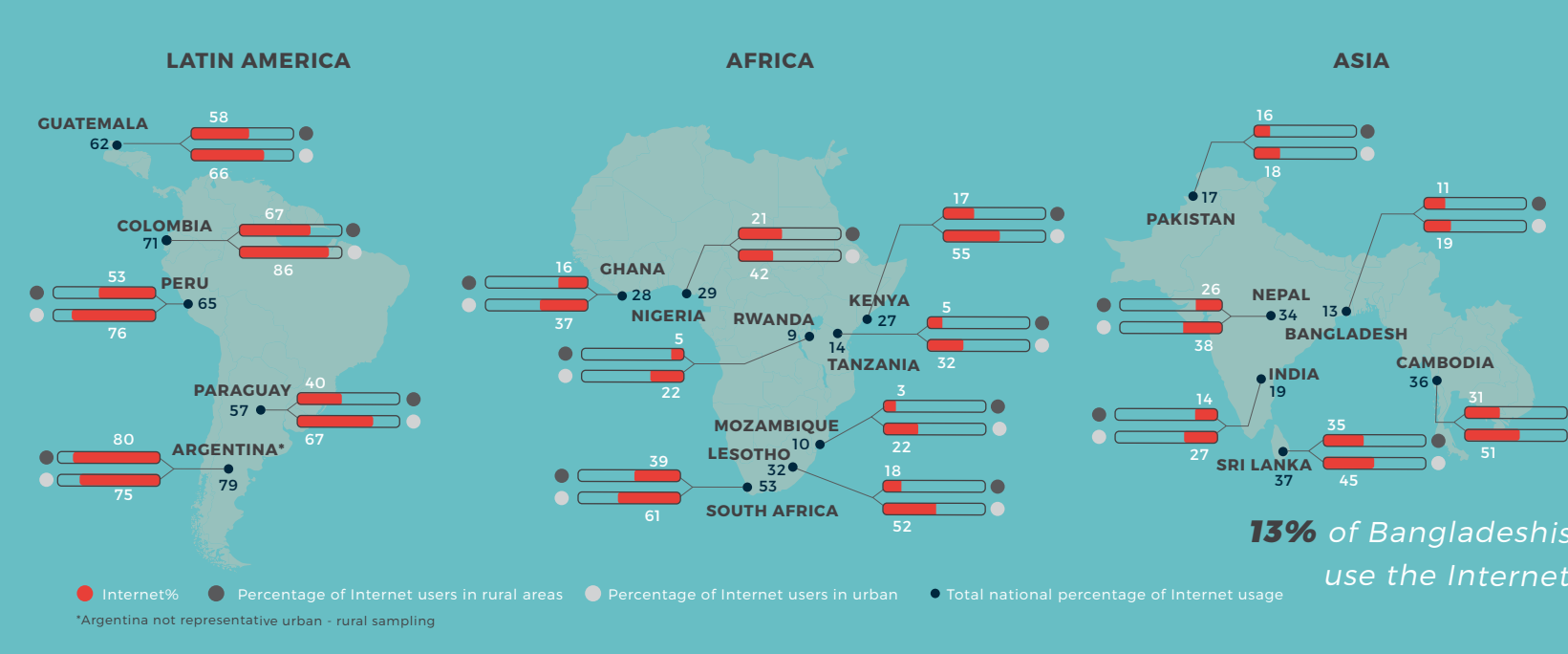


Of the 40% of Mozambicans who own a phone, 78% own a basic phone and only 17% own a smartphone.

INTERNET LOCATION INSIGHTS

2. URBAN USE FAR OUTSTRIPS RURAL USE IN ALL THREE REGIONS

The #AfterAccess data demonstrates that living in urban or rural areas which have greater coverage does not necessarily get populations online. Relying on aggregated figures alone masks the issues faced by both rural and urban populations who cannot exploit the potential of the service. Disaggregated data brings other issues to light which the #AfterAccess's research will explore in more detail.



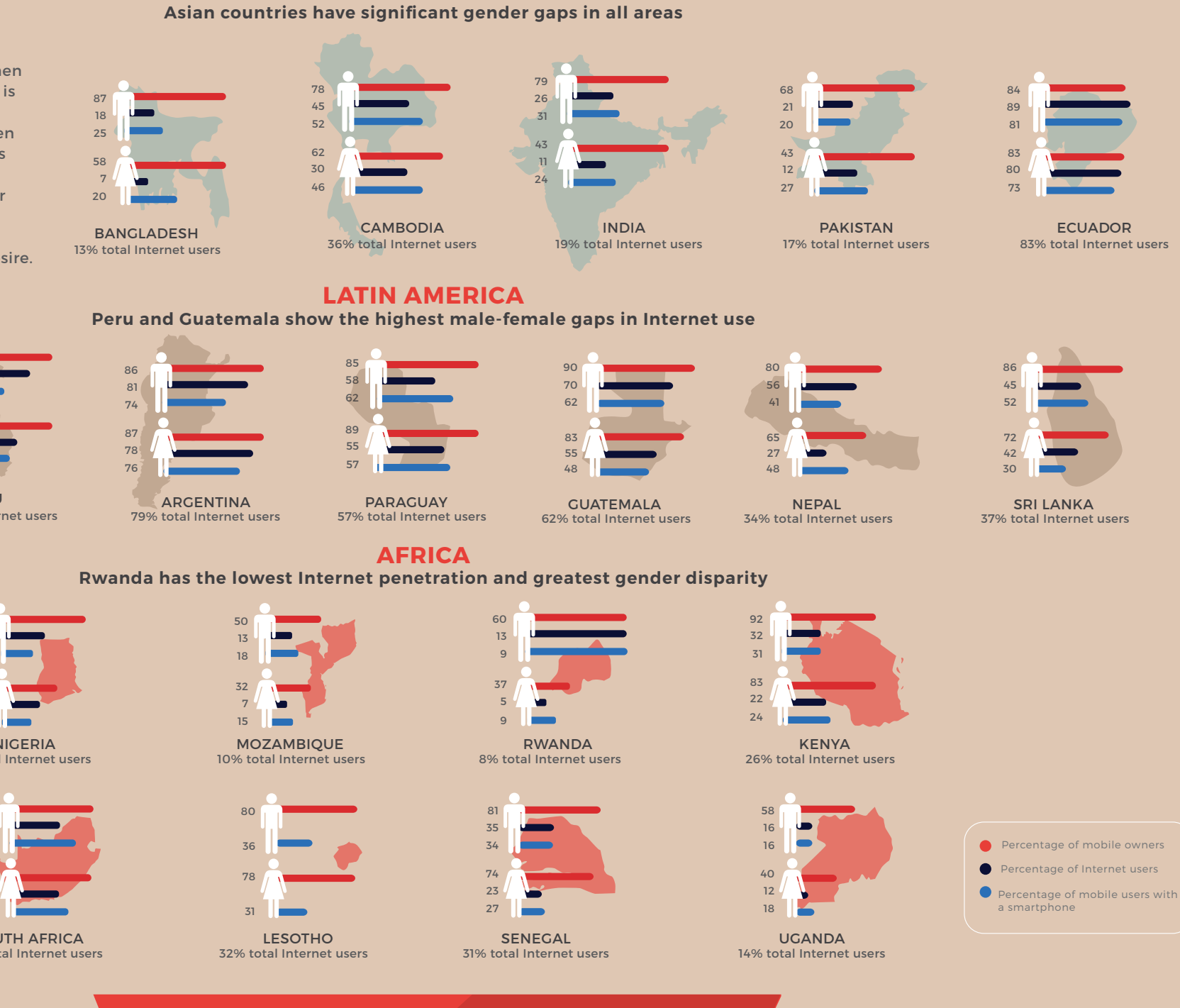
Peru and Paraguay show the highest urban-rural gaps in social media use in Latin America

13% of Bangladeshis use the Internet

INTERNET GENDER INSIGHTS

3. THE GENDER GAP PERSISTS, ESPECIALLY IN AFRICA AND ASIA

The digital gender gap mirrors offline gender inequality. In India, 57% more men use the Internet than women and there is no quick fix. Education levels and their associated income are what drive women across the regions to adopt new services and technologies. Ensuring equitable access to education will result in greater employment opportunities and allow women to independently select the ICT products and services they need and desire.

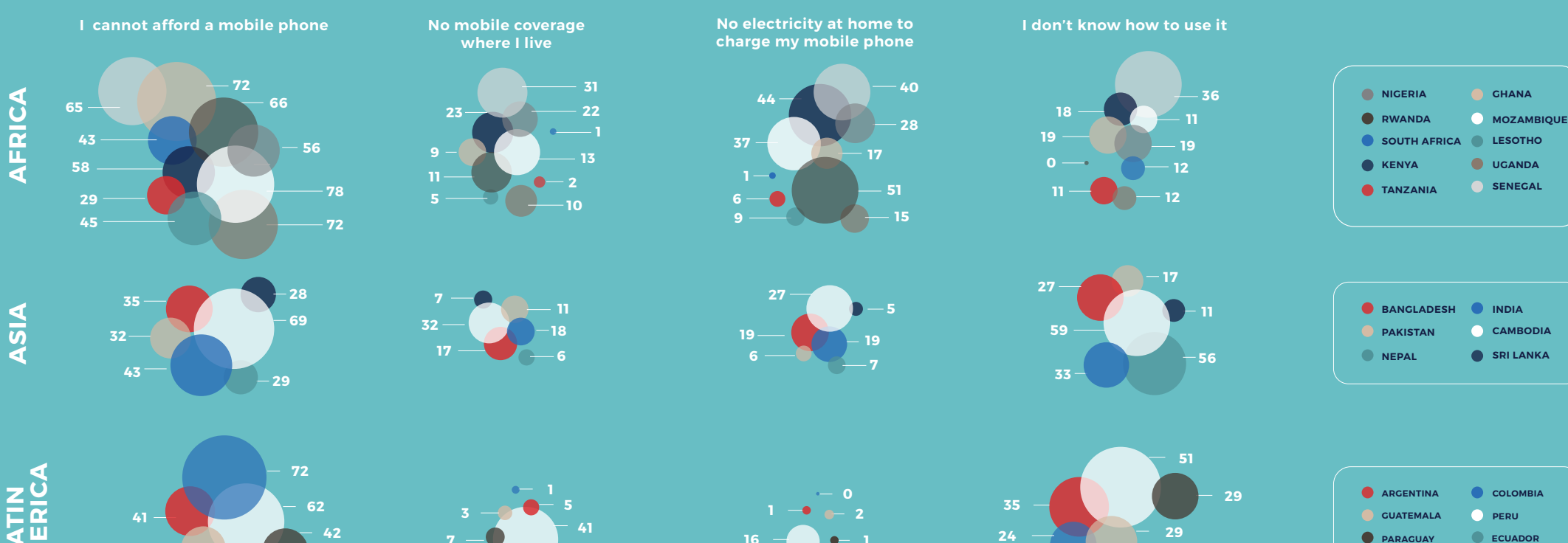


Rwanda has the lowest Internet penetration and greatest gender disparity

4. UNAFFORDABILITY AND LACK OF AWARENESS ARE KEY BARRIERS TO ADOPTION

Understanding why people are not online is as important as understanding the ways that people access and use the Internet. Unaffordability is the primary barrier to mobile and smartphone ownership in all three regions, and the absence of electricity is as big a challenge to overcome in parts of Asia and Africa as the lack of mobile coverage. Other barriers to internet access and mobile phone ownership for the different regions may be accessed on the afteraccess.net website.

BARRIERS TO MOBILE OWNERSHIP



BARRIERS TO INTERNET USE

