

Rural and low income customers in Africa – priority issues

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Innovative Demand Models for Telecommunications Services



Collaborators:

- Uganda Communications Commission
- Botswana Telecommunications Authority
- National Communications Authority (Ghana)

DFID Knowledge and Research (KaR) programme



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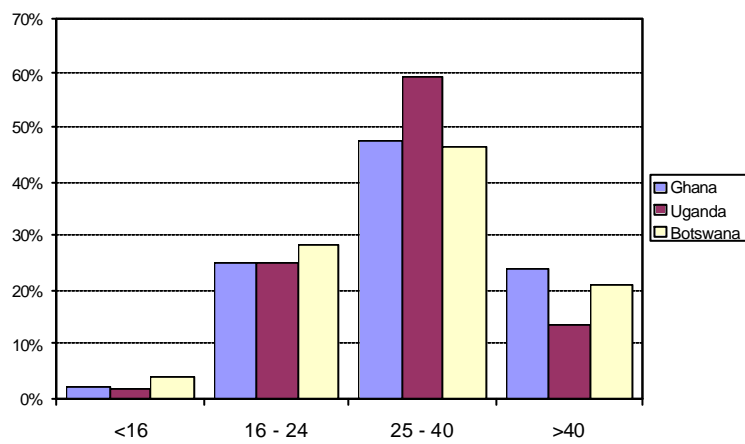




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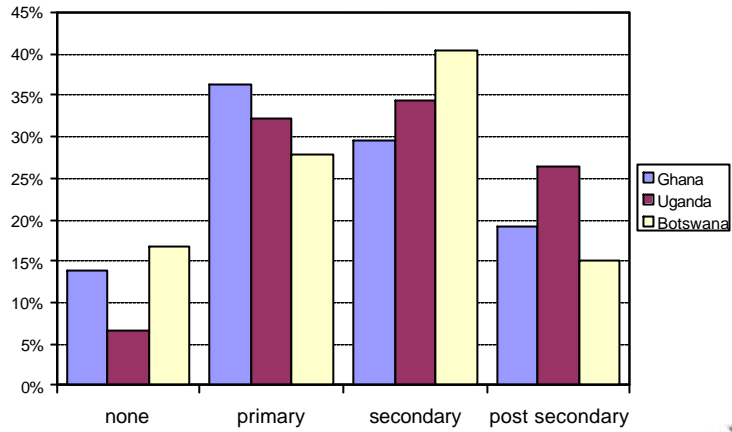
Sample - Age



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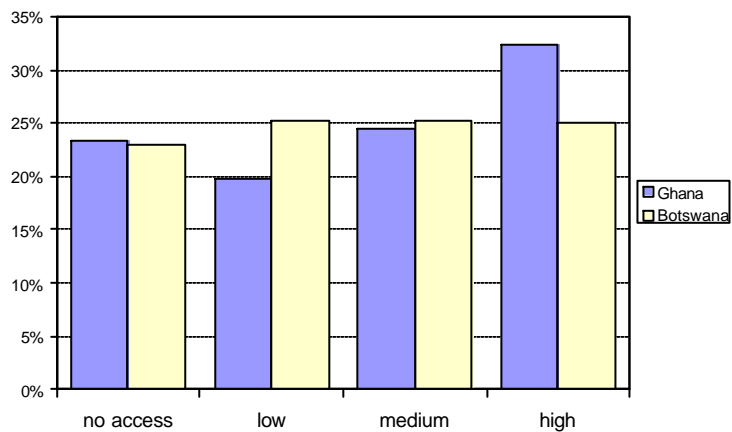
Sample – education



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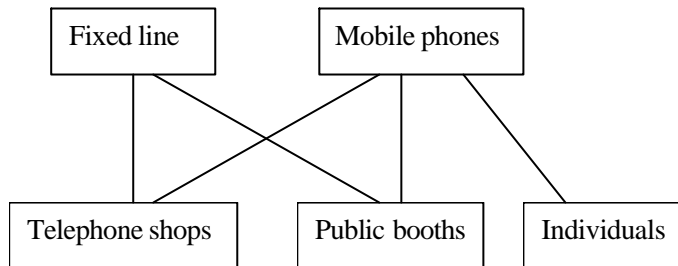
Sample – service level



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Phones and access



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Use of Phones (fixed & mobile)

	Botswana	Ghana	Uganda
Use of any phone	78%	87%	81%
Fixed line phones	67%	85%	36%
Mobile phones	45%	20%	68%

Regular use of phones – whole sample

	Botswana	Ghana	Uganda
Use of any phone	76%	80%	73%
Fixed line phones	76%	79%	29%
Mobile phones	29%	6%	63%

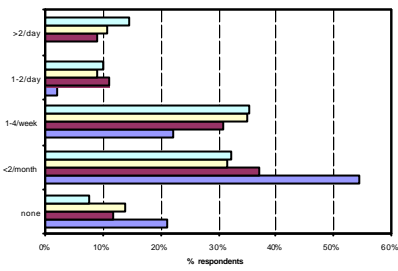
Regular use of phones – no access and rural areas



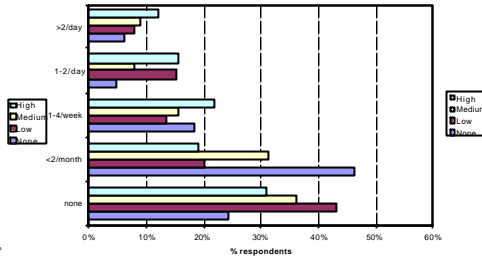
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Frequency of use - fixed



Ghana



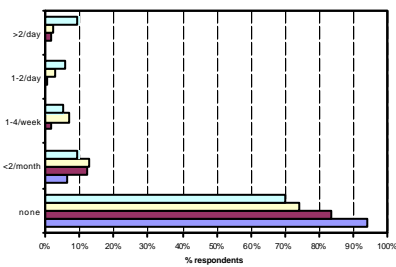
Botswana



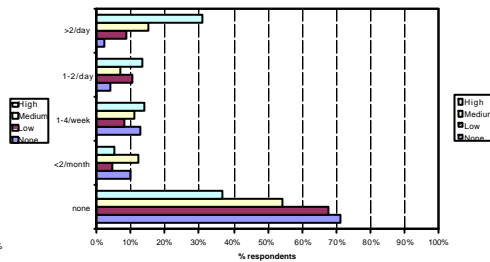
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Frequency of use - mobile



Ghana



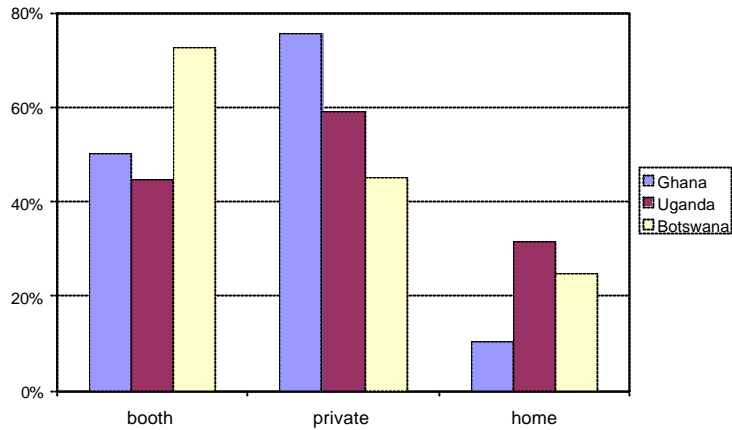
Botswana



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Means of access



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Use of Public access points

	Botswana	Ghana	Uganda
Public access (any)	69%	85%	72%
Booths	66%	55%	46%
Commercial providers	45%	76%	63%

Regular use of public access points

	Botswana	Ghana	Uganda
Public access (any)	73%	76%	64%
Booths	72%	39%	33%
Commercial providers	40%	71%	59%

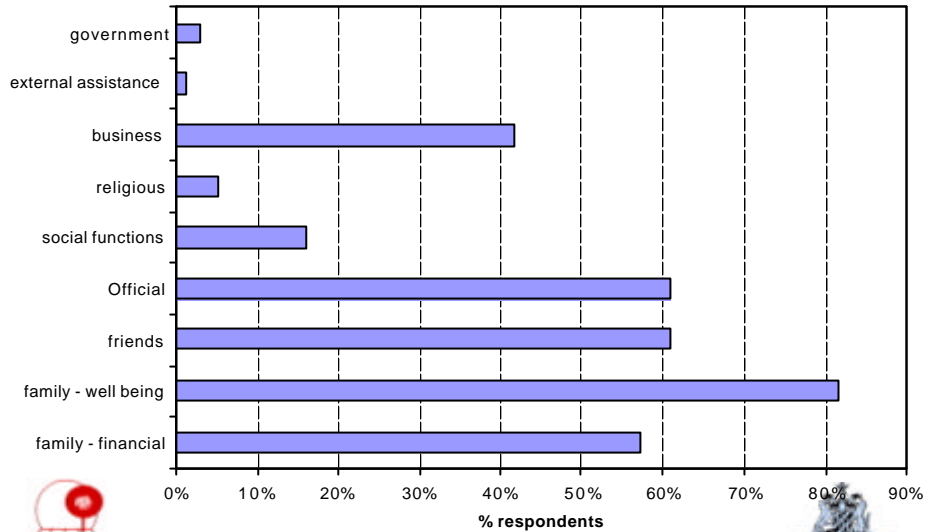
Regular use of public access points – no access and rural areas



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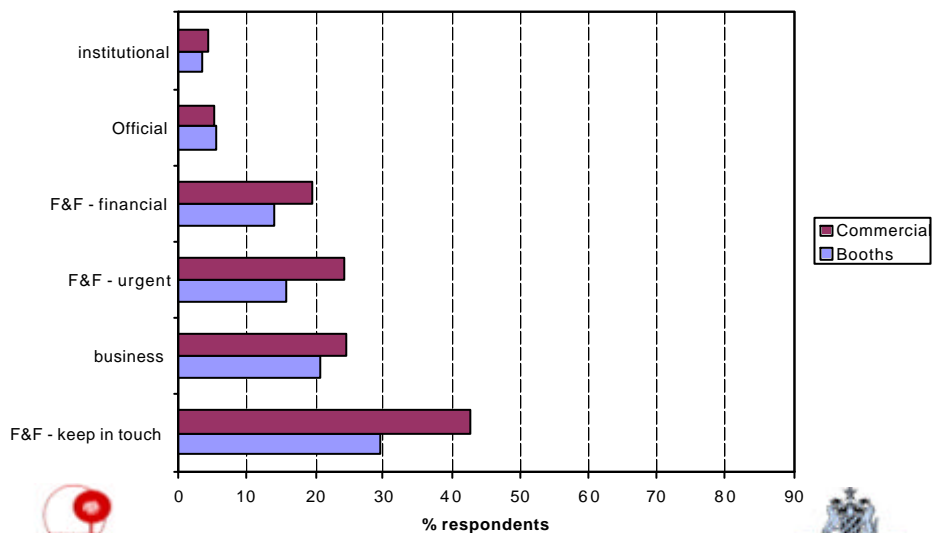
Purpose of calls – Ghana



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Purpose of calls – Uganda



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Phones – attitudes

Positive

- communicate with friends and family;
- speed of communication
- Security – travel and calling for assistance
- Convenience of mobile phones
- Privacy offered by mobile phones
- Cost savings from access to a local phone

Negative

- Maintenance and quality of service
- Cost – expense and billing systems
- Poor mobile network coverage;
- Danger of losing mobile phones.



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Public access points – attitudes

Positive

- Cost –booths regarded as cheaper
- Managing calls – cost and time
- Message services offered by attendants
- personal service (shops and attendants)

Negative

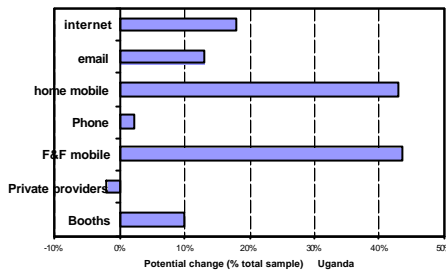
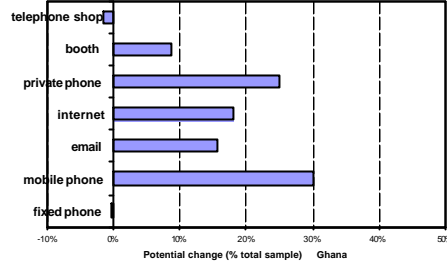
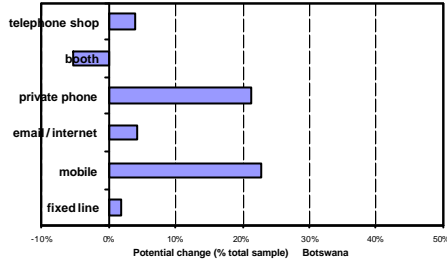
- Privacy
- maintenance of booths
- Queuing (booths and shops)
- High costs
- Cheating by attendants.



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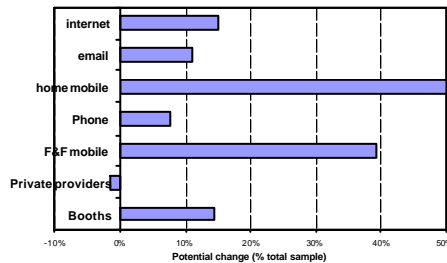
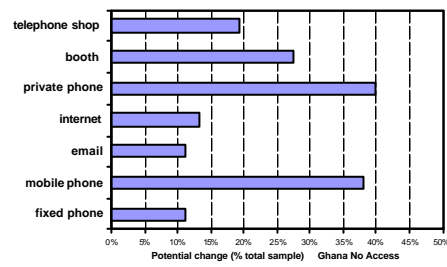
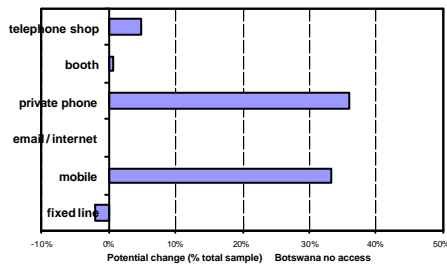
Potential for change



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Potential change – no access



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Barriers/drivers – fixed line

Barriers	All	None	Drivers	All	None
Botswana					
Will suffer from lines being cut at times	10	6	Communicate with friends & family abroad	3	1
Misuse leads to increased cost		7	Having a fixed phone is convenient	6	2
difficult to hear because of the poor lines		7	able to ask for money help from family	12	3
You will miss calls when out		11	Fixed phones are reliable	7	4
Ghana					
Phone will get cut off during your call		14	Communicate with friends & family abroad	1	1
Don't understand computerised instructions		12	Reduce the risk of misunderstanding		2
			Direct access to good information	3	3
			Reduce dangers of travel to nearest phone	10	4
Uganda (phones in general)					
Get cut off when talking on the phone		1	Cheaper than traveling to visit people		3
It is too expensive to call other networks	1	2	Know how to make calls using the phone	3	4
calls too expensive for beeps to be returned		8	Can make and receive calls anywhere	6	5
Can't phone people in areas with no network		12	Phone is a quick means of communication		6



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Barriers/drivers – mobile

Barriers	All	None	Drivers	All	None
Botswana					
Easily stolen or lost	15	11	Able to make calls at times of emergencies	4	1
Networks go down frequently	18	12	Able to ask money / help from family	8	2
Too expensive to purchase	.	16	Easy to use mobile phones	3	3
Easily damaged?	17	18	Able to sent and receive text messages	5	4
Ghana					
			Mobile phone too expensive to use		1
			Enable the use of text messages	2	
			SMS reduces cost of mobile communication	1	2
Uganda (see phones)					



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Barriers/drivers – booths

Barriers	All	None	Drivers	All	None
Botswana					
Public booths being poorly maintained	3		Public booths are cheaper	1	1
Public booths can capture your coins		2	Public booths are useful for emergency	2	
Ghana					
			Booths are the cheapest way to use phone	1	1
			Can make calls at ant time of day or night		2
Uganda					
Markup by attendants makes cost too high		1	attendant gives explanation of charges	1	
B ooth attendant will cheat me	2				



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Barriers/drivers – phone shops

Barriers	All	None	Drivers	All	None
Botswana					
Queuing due to a lack of phones	6	1	Able to make your call	2	2
Telephone shops provide no privacy	5	5	show you your balance while still talking	1	3
			Telephone shops are available	4	4
			Able to use phone shops when low on units	3	
Ghana					
Strangers do (not) get good service		1			
Uganda					
			Attendant receive calls and deliver messages	1	
			Attendant / staff gives a good service		1
			Attendant is friendly and helpful	2	2
			Convenient (near by)		3



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