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Internet use barriers and user strategies: perspectives from Kenya, Nigeria, South Africa and Rwanda

Chennai Chair

Executive summary¹
Beyond Access Public Policy Paper series.
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February 2017

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¹ This is the executive summary for the report to be released and published on the RIA website on the 8th of March. Contact communications@researchictafrica.net for notifications.

Acknowledgements

This study was commissioned by the Mozilla Foundation as part of a wider study examining the 'Beyond Access' challenges that underlie digital inequality being undertaken across the Global South with the support of International Development Research Centre (IDRC). Focus groups were also carried out in India in Asia and Peru and Columbia in Latin America. The focus groups were designed drawing on the results of the ICT access and use surveys conducted by Research ICT Africa in 2012. These studies provide a qualitative examination of internet use and the barriers and user-strategies adopted to overcome limitation. It also examined some of the supply side issues such as the role of subsidised OTT services in enabling or limiting access to and use of the Internet. The findings will be used to inform and refine the in-depth questionnaire that covers a myriad of issues from expenditure and capabilities of users to social networking and cybersecurity awareness.

"We don't believe possession of a smartphone is enough to unlock the possibility of the Web for a significant set of people. We believe the open Internet is a social, educational, and economic tool that can build communities and businesses, and empower individuals. We support field research and analysis to dig into deep questions about user behavior and real-world effects of access models." - Mitchell Baker, Mozilla

"As more and more governments, donors, and non-governmental organisations (NGOs) invest in technology to help improve conditions in areas such as agriculture, health, education, and gender empowerment, they need to understand how the communities they are trying to help access and use the technology. Without that understanding, their programs are vulnerable to failure." (Elder et al. 2013)

Published: February 2017

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Executive Summary

Affordability is cited as one of the biggest challenges to internet uptake and use. Some service providers and users of over-the-top (OTT) platforms and applications have devised strategies that allow the OTT services to be used as communication substitutes for traditional voice and SMS services over mobile devices. The OTT services have become the main entry point to the Internet for most users in the prepaid mobile environment that characterises most African markets. To entice price-sensitive users and to encourage new internet users, the availability of subsidised data - whether discounted or free - prompts questions of how internet access and use are affected. Does it enable access to the Internet for first-time users? Does it improve the intensity of use, allowing people to explore the Internet without concerns of cost? Does it lock people into pared-down versions of social networking platforms? This comparative country study, based on focus groups conducted in November 2016 in Kenya, Nigeria, Rwanda and South Africa, sought to develop evidence of why people, use the Internet the way they do, specifically when their data is subsidised.

To answer these questions RIA conducted focus groups in Kenya, Nigeria, Rwanda and South Africa in November 2017. The groups were stratified on the basis of urban and rural location and on gender. The finding highlighted the relationship that Internet access and use have with the social and economic context of both users and non-users. By reviewing the findings based on geographical location, gender and the extent of internet use, similarities as well as differences in the comparative countries can be identified. The Internet is an important means of communicating and finding information on various platforms whether social media, email or search engines. In an environment where voice and SMS tariffs are more expensive in comparison with similar data offers across all regions and regardless of location, the Internet is perceived as an easier and cheaper alternative.

Motivations for people to go online are widespread. Students go online for research purposes, professionals to communicate with colleagues and unemployed people go online to look for work opportunities. People use the Internet for business, work and for financial transactions. Staying in touch with friends and family, making new friends and possibly finding relationships online motivate people most to access and use the Internet, though this is seldom the sole reason.

With regards to content, people are unable to list their top sites but the search engine, Google, was identified as the main entry point to other sites that people accessed. Assessing whether there is a difference between men and women in content access, men seem to favour sports and betting content while women tend to search more for fashion, online-shopping and health content.

The lack of, or limited availability of, local content is a barrier to Internet uptake. In Rwanda and Nigeria local content is immensely popular. Informational government and local news sites are popular in the former, whereas Nigerian respondents preferred entertainment sites with movies, downloadable content and celebrity updates.

Surprising perhaps, considering the controversy around zero-rated services such as Freebasics, people are not highly dependent on subsidised data to access the Internet, but they are a tactic of broader price-control strategies. Mobile phones remain the most popular means of Internet access for most respondents. Using personal laptops, however, or accessing computers elsewhere such as the work place, internet café or public library, are another means of access for urban and peri-urban users, in particular. In all countries, fully-subsidised data is offered by one or two mobile operators. This does not tie down users to limited content available, nor does it result in new users going online because of it. What is clear across all countries is that subsidised data forms part of multiple user strategies for data-cost management, which is strongly dependent on the availability of 'free' data as well as the culture of OTT substitution.

None of the new internet users that formed part of the focus groups reported that they went online because of the availability of Freebasics. There was little awareness of the service in addition to scepticism regarding free data more general. There was a common perception that nothing is ever

truly free. These strategies included a preference for buying mobile monthly, weekly or daily data bundles, or using specific products such as Facebook or WhatsApp-only bundles. To capitalise on data offers and promotions (and as an indication of poor network quality) people also used multiple SIM cards. Poor network quality and coverage limits the consumption of subsidised data since some respondents reported not having service coverage. This lack of market choice is more prevalent in the rural areas of Kenya, Rwanda and South Africa.

Subsidised data does not lock users into particular content avenues since other means of accessing the internet were reported during the focus groups. Most respondents in urban and peri-urban areas used private individual connections, sought out free Wi-Fi provided by commercial entities, and sought the free public Wi-Fi provided in a public location or on transport services by government-led initiatives in Rwanda and South Africa. This service is mainly available in urban areas, as noted from the peri-urban and rural respondents who still had to travel to access public Wi-Fi points. Interestingly, some respondents in Rwanda and South Africa rely exclusively on internet cafés as they do not have mobile devices. Wi-Fi and internet cafés are used for data-intensive activities such as downloading movies or time consuming projects such as resumé writing.

Supply-side barriers to Internet use for both users and non-users alike are cited as limited coverage, poor quality of service and electricity shortages. In deep rural South Africa, the extent of internet use is limited by the limited sources of power to charge mobile phone batteries. The devices need to be taken to a different charging point, often overnight. The low affordability of data and devices is cited as another barrier to use by both internet users and non-users. For internet non-users, the choice of spending the income you have on data may have the opportunity cost of basic commodities such as food.

Moreover, skewed perceptions of internet content from the respondents limits internet use. Women in particular are wary of the content they would be exposed to online and how it can affect their intimate relationships. There is concern about privacy and security as people fear financial fraud or misrepresentation online. Gendered issues of patriarchy and power relations between men and women impair internet use and are perceived, in some cases, as interfering with their relationships. Time spent online is perceived by some men and women to take women away from looking after their partners and fulfilling family responsibilities.

Digital skills and illiteracy are demand-side issues that greatly affect non-users as well – even those who have smart devices, limiting their internet use.

The evidence gathered here is based on focus groups with individuals selected on the grounds of locality (urban or rural) and gender in order to explore social, cultural and softer economic issues with the depth that cannot be quantified in surveys. Gathering evidence in this way enables the identification and inference of emerging trends, usage patterns, price-quality optimisation and the way social relations influence these. It also raises issues that require quantification in the forthcoming “Beyond Access” survey being undertaken in 2017 across 20 countries in the Global South.

This study serves to nuance the quantitative evidence used for policymaking. To this end, the report indicates that subsidised data does not limit the extent of Internet use, but rather that the extent of Internet use needs to be understood in relation to several contextual factors. Internet users make use of subsidised data to manage their data costs together with other tactics. Reducing the cost of data and providing affordable services should remain a policy solution to low internet use. However, this should be done to improve infrastructural policy solutions, such as the release of spectrum and the promotion of community-based initiatives addressing rural connectivity where users often have little choice among services providers.

‘Beyond access’ challenges require a rights-based approach to deal with barriers such as privacy and security online by ensuring and raising awareness thereof, for example. The possibilities of achieving this in a digital context where offline rights do not exist is one of the biggest challenge for many

countries. Other factors limiting the participation of the poor and un-skilled, particularly women and rural populations, will require much more extensive multi-generational policy intervention to address broader inequalities in the economy and society, particularly in relation to unequal education, that play out on digital platforms. Without such interventions of redress, the expansion of the Internet will perpetuate and even amplify digital inequality in society.

“I think those free things to be honest do not motivate us to use the internet to buy data. Personally speaking those things do not motivate me. Those free data and what you call it, the Internet shark swallows it very quickly.”-Urban Male South African Respondent

