Outline

Section 1:
Objectives, Survey Design and Organisation

Section 2:
Findings

Section 3:
Key Findings, Conclusions and Recommendations
Section 1: Objectives, Survey Design and Organisation

Section 2: Findings

Section 3: Key Findings, Conclusions and Recommendations
**Measuring the Information Society**

*Adapted from the OECD Guide to Measuring the Information Society (2009)*

- **ICT Supply**
  - ICT Sector
    - services
    - manufacturing
    - wholesale trade

- **ICT Demand**
  - Access & use by:
    - households
    - individuals
    - businesses
    - public org’s
    - private org’s

- **Infrastructure products**
- **Skills & knowledge**
- **Public policy**
  - regulation
  - legislation
  - ICT strategies

**Economic & social impact of ICT**

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**Objectives of study**

Describe awareness, attitudes and usage by enterprises, institutions, households and individuals of communication services

- Describe awareness and attitudes by enterprises, institutions, households and individuals to: Access/coverage, QoS, Affordability, Content, Data privacy, and Information security

- Establish type of communication facilities owned and/or used and the nature of ownership

- Ascertain proportion of income spent on various communication services

- Identify current and potential future communications market attributes

- Determine level and/or extent of multiple ownership of communication facilities in various categories of communication services

- Identify existing communication gaps and propose options to address these
Survey Overview

Degree of precision desired for survey estimates, cost and operational limitations and efficiency of design all influenced survey sample size

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Households &amp; Individuals</th>
<th>Businesses</th>
<th>Institutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domains</td>
<td>1 = National level</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tabulation groups</td>
<td>Urban, Rural</td>
<td>National level</td>
<td>National level</td>
</tr>
<tr>
<td>Sampling method</td>
<td>Stratified, multi-stage random sampling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oversampling</td>
<td>Urban 60%, Rural 40%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clustering</td>
<td>Enumeration Areas (EA) National Census</td>
<td></td>
<td></td>
</tr>
<tr>
<td>None response</td>
<td>Random substitution</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sample frame</td>
<td>Census sample from UBOS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Method</td>
<td>Interviews on 7” android tablets using ODK Collect</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timelines</td>
<td>Data collected between June and July 2014</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confidence level</td>
<td>95%</td>
<td>95%</td>
<td>95%</td>
</tr>
<tr>
<td>Target sample size</td>
<td>768</td>
<td>398</td>
<td>78</td>
</tr>
<tr>
<td>Actual sample size</td>
<td>1529</td>
<td>445</td>
<td>70</td>
</tr>
</tbody>
</table>

Survey Design

Survey was designed to be nationally representative in terms of scope. Sampling was random and performed in several steps.

- Target all households, businesses and institutions
- Individuals 15+ years
- Enumeration Areas from UBOS’s national census sample frame
- 3 questionnaires: household & individual, business and institutional
- Stratified, multi-stage random sampling
**ITU ICT Indicators**

<table>
<thead>
<tr>
<th>Coding</th>
<th>Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>HH1</td>
<td>Proportion of households with a radio</td>
</tr>
<tr>
<td>HH2</td>
<td>Proportion of households with a television</td>
</tr>
<tr>
<td>HH3</td>
<td>Proportion of households with a telephone</td>
</tr>
<tr>
<td>HH4</td>
<td>Proportion of households with a computer</td>
</tr>
<tr>
<td>HH5</td>
<td>Proportion of individuals with a computer</td>
</tr>
<tr>
<td>HH6</td>
<td>Proportion of households with Internet</td>
</tr>
<tr>
<td>HH7</td>
<td>Proportion of individuals with Internet</td>
</tr>
<tr>
<td>HH8</td>
<td>Proportion of individuals using the internet, by location</td>
</tr>
<tr>
<td>HH9</td>
<td>Proportion of individuals using the internet, by type of activity</td>
</tr>
<tr>
<td>HH10</td>
<td>Proportion of individuals using a mobile phone</td>
</tr>
<tr>
<td>HH11</td>
<td>Proportion of households with internet, by type of service</td>
</tr>
<tr>
<td>HH12</td>
<td>Proportion of individuals using the internet, by frequency</td>
</tr>
<tr>
<td>HH13</td>
<td>Proportion of households with multichannel television, by type</td>
</tr>
<tr>
<td>HH14</td>
<td>Barriers to household internet access</td>
</tr>
</tbody>
</table>

**Survey Organisation**

*Country was divided into 4 operational zones—central, eastern, northern and western based on language and logistical efficiency.*

3 field teams (1 supervisor + 4 enumerators)

Sample data weighted to represent national population
ODK platform + 7” android tablets

GSM Network + generators
Discussion

Section 1:
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Key Findings, Conclusions and Recommendations
Households with different ICT assets

Radio was the most widely owned form of communication asset, while desktop computers were the least owned.

- **Radio**: 60.8% (All households), 59.6% (Urban), 64.9% (Rural)
- **TV**: 14.8% (All households), 8.9% (Urban), 35.7% (Rural)
- **Cassette/DVD/CD**: 8.1% (All households), 3.2% (Urban), 26.9% (Rural)
- **Refrigerator**: 4.3% (All households), 14.0% (Urban), 14.0% (Rural)
- **Working Laptop**: 1.2% (All households), 2.2% (Urban), 4.3% (Rural)
- **Electric or Gas Cooker**: 1.9% (All households), 0.8% (Urban), 5.8% (Rural)
- **Working Desktop Computers**: 0.8% (All households), 0.8% (Urban), 0.3% (Rural)

Households

Dissemination Workshop Slides
Household with no Internet access

What is the main reason why the household does not have a working Internet Connection?

- Don’t know how to use it: 37.3% (Urban), 51.7% (Rural)
- Don’t need it: 32.0% (Urban), 18.2% (Rural)
- Can not afford it: 11.1% (Urban), 4.4% (Rural)
- Not available in our area: 10.6% (Urban), 6.6% (Rural)
- Have access to internet elsewhere: 1.7% (Urban), 1.4% (Rural)
- Other: 1.4% (Urban), 0.9% (Rural)
- Privacy or security reasons: 0.1% (Urban), 0.2% (Rural)

Individuals
**Individual access and usage of ICTs**

*Radio was the most widely owned and used form of communication, followed by mobile phones*

<table>
<thead>
<tr>
<th>Access/Usage</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owned a mobile phone</td>
<td>52.3%</td>
</tr>
<tr>
<td>Used a mobile in last 3 months</td>
<td>62.8%</td>
</tr>
<tr>
<td>Owned a radio</td>
<td>83.4%</td>
</tr>
<tr>
<td>Listen to radio</td>
<td>70.4%</td>
</tr>
<tr>
<td>Owned a computer</td>
<td>3.8%</td>
</tr>
<tr>
<td>Used Internet in last 3 months</td>
<td>6.5%</td>
</tr>
<tr>
<td>Used public phone in last 3 months</td>
<td>5.8%</td>
</tr>
<tr>
<td>Watched TV</td>
<td>15.5%</td>
</tr>
<tr>
<td>Used postal services</td>
<td>3.2%</td>
</tr>
<tr>
<td>Used mobile money</td>
<td>24.4%</td>
</tr>
</tbody>
</table>

**Barriers to Mobile Phones Ownership**

*Why don't you have a mobile phone?*

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I cannot afford it</td>
<td>88.7%</td>
</tr>
<tr>
<td>No electricity at home to charge the mobile phone</td>
<td>72.0%</td>
</tr>
<tr>
<td>No mobile coverage where I live</td>
<td>38.9%</td>
</tr>
<tr>
<td>I don't have anyone to call</td>
<td>18.9%</td>
</tr>
<tr>
<td>My phone is broken</td>
<td>6.8%</td>
</tr>
<tr>
<td>My phone got stolen</td>
<td>6.7%</td>
</tr>
</tbody>
</table>
**Mobile phones—SIMs**

**Why do you have more than one SIM card?**

- Get cheap rates on each network: 72.1% Urban, 53.1% Rural
- Availability of phones that can hold more multiple SIM: 47.6% Urban, 47.6% Rural
- Friends and family are on different networks: 44.3% Urban, 44.3% Rural
- Poor network coverage in some areas: 35.3% Urban, 35.3% Rural
- Take advantage of special offer/bundle/promotion from provider: 27.7% Urban, 27.7% Rural

**Mobile phone—Calling constraints**

*Cost was the biggest constraint, followed by network coverage*

**What prevents you from making more phone calls from the mobile phone?**

- Cost of calls: 77.4%
- Coverage: 12.9%
- Nothing: 7.6%
- People I want to call have no phones: 1.3%
- Other: 0.8%
Radio
Still most dominant in terms of access and usage with less location (rural vs. urban) bias compared to other forms of communication

70.4% indicated they listened to radio. 83.4% of these also owned a personal radio

83.3% listened to radio at home. 10.3% listened at friends’, relatives’ or neighbours’ home

Radio—Listening
What time do you normally listen to radio? (multiple-select)

<table>
<thead>
<tr>
<th>Time</th>
<th>Rural</th>
<th>Urban</th>
</tr>
</thead>
<tbody>
<tr>
<td>05:00-08:00</td>
<td>24.4%</td>
<td>22.5%</td>
</tr>
<tr>
<td>08:00-12:00</td>
<td>55.4%</td>
<td></td>
</tr>
<tr>
<td>12:00-16:00</td>
<td>47.1%</td>
<td>40.0%</td>
</tr>
<tr>
<td>16:00-20:00</td>
<td>71.5%</td>
<td>60.7%</td>
</tr>
<tr>
<td>20:00-24:00</td>
<td>53.0%</td>
<td>51.7%</td>
</tr>
<tr>
<td>24:00-5:00</td>
<td>11.4%</td>
<td>11.0%</td>
</tr>
</tbody>
</table>
Radio—What programmes do you listen to?

(Multi-select)

- News: 78.9% urban, 88.6% rural
- Programmes on local issues: 50.3% urban, 64.7% rural
- Music: 43.6% urban, 52.0% rural
- Religious: 24.3% urban, 30.8% rural
- Educational programmes: 19.5% urban, 29.0% rural
- Sports: 27.8% urban, 26.0% rural
- Health programmes: 18.1% urban, 25.8% rural
- Politics: 15.8% urban, 19.8% rural
- Business purposes: 15.3% urban, 19.8% rural
- Other: 2.9% urban, 1.7% rural

Television

Huge disparity in watching TV by location. Access to TV greatly influenced by access to electricity and affordability of TV sets

1 in 10 (15.5%) individuals watched TV.
Matches with 14.8% of households that owned TVs

44.9% of Urban individuals watched TV compared to only 9.0% of rural individuals
**TV—Location**

*Where do you watch TV normally?*

- **at home**: Urban 44.6% | Rural 36.3% | Total 80.9%
- **public places (bars, community halls, TV Clubs)**: Urban 8.6% | Rural 16.6% | Total 25.2%
- **at friends, relatives or neighbours home**: Urban 9.1% | Rural 1.6% | Total 10.7%
- **other**: Urban 1.3% | Rural 2.6% | Total 4.0%
- **On my mobile phone**: Urban 0.1% | Rural 0.0% | Total 0.1%

**TV—Viewing**

*What time do you normally watch TV? (multiple-select)*

- **05:00-08:00**: Urban 3.8% | Rural 1.7% | Total 5.5%
- **08:00-12:00**: Urban 11.8% | Rural 7.0% | Total 18.8%
- **12:00-14:00**: Urban 13.4% | Rural 12.8% | Total 26.2%
- **14:00-17:00**: Urban 19.5% | Rural 27.4% | Total 46.9%
- **17:00-19:00**: Urban 43.0% | Rural 62.4% | Total 105.4%
- **19:00-21:00**: Urban 51.6% | Rural 61.6% | Total 113.2%
- **21:00-23:00**: Urban 54.2% | Rural 54.2% | Total 108.4%
- **23:00-05:00**: Urban 5.6% | Rural 5.6% | Total 11.2%

Dissemination Workshop Slides
**TV—What programmes do you watch?**

(Multiple-select)

- **News**: 80.2% Urban, 84.1% Rural
- **Sports**: 28.5% Urban, 42.0% Rural
- **Programmes on local issues**: 32.7% Urban, 36.3% Rural
- **Music**: 25.5% Urban, 33.4% Rural
- **Educational programmes**: 16.9% Urban, 29.3% Rural
- **Business programmes**: 15.2% Urban, 30.6% Rural
- **Religious**: 18.9% Urban, 16.6% Rural
- **Health programmes**: 13.4% Urban, 18.5% Rural
- **Other**: 14.1% Urban, 9.6% Rural
- **Politics**: 12.7% Urban, 8.3% Rural

**TV—Reasons did not watch TV**

If you don’t watch TV, why not?

- **House has no electricity**: 56.9% Urban, 73.7% Rural
- **Cannot afford a TV set**: 61.4% Urban, 67.0% Rural
- **No TV signal in my area**: 10.7% Urban, 19.3% Rural
- **Dont have time to watch TV**: 11.2% Urban, 6.5% Rural
- **Not interested**: 4.7% Urban, 2.9% Rural
Public Telephones

Use of public telephones has continued to decline based on usage trends of various communication services

5.8% of individuals had used a public phone in the past 3 months

Public Phones—Distance

Walking distance to nearest Public Phone from home

<table>
<thead>
<tr>
<th>Distance</th>
<th>Urban</th>
<th>Rural</th>
</tr>
</thead>
<tbody>
<tr>
<td>too far to walk</td>
<td>24.5%</td>
<td>71.4%</td>
</tr>
<tr>
<td>1 to 2 hours</td>
<td>9.5%</td>
<td></td>
</tr>
<tr>
<td>30 to 60 minutes</td>
<td>5.3%</td>
<td>7.1%</td>
</tr>
<tr>
<td>20 to 30 minutes</td>
<td>3.6%</td>
<td>10.6%</td>
</tr>
<tr>
<td>10 to 20 minutes</td>
<td>3.6%</td>
<td></td>
</tr>
<tr>
<td>less than 10 minutes</td>
<td>4.8%</td>
<td></td>
</tr>
</tbody>
</table>
Public Phones—Motivation for use

- Use it because it is cheaper: 17.8% (Urban), 35.6% (Rural)
- Difficulties charging the battery of mobile: 19.1% (Urban), 21.2% (Rural)
- Do not have a mobile phone: 23.8% (Urban), 18.3% (Rural)
- Other: 9.5% (Urban), 2.4% (Rural)
- Easier than having to recharge airtime mobile: 5.8% (Urban), 2.4% (Rural)
- For privacy or anonymity: 0.5% (Urban), 2.4% (Rural)
- Do not have a fixed line phone at home: 1.0% (Urban), 0.0% (Rural)

Public Phones—Still relevant?

A number of factors signify that public phones are still relevant despite the downward trend

- Don’t own mobile phones: 47.7%
- Can’t afford mobile phone: 88.7%
- Shared mobile phone use: 22.1%
- Active SIM, but no mobile phone: 6.1%
Computers and Internet
Most individuals did not own any computing devices. Mirroring Internet access, which was still low and largely urban dominated.

Only 3.8% of individuals owned a computing device while 6.5% had used the Internet in the past 3 months.

19.4% of Urban individuals had used the Internet compared to only 3.7% of their Rural counterparts.

Internet—Frequency of use
Age was not a good predictor of frequent Internet usage. But access location and related cost of access played an important role.

How often on average have you used the Internet in the last 3 months?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>At least once a day</th>
<th>At least once a week</th>
<th>At least once a month</th>
<th>Less than once a month</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>28.2%</td>
<td>39.8%</td>
<td>17.2%</td>
<td>14.8%</td>
</tr>
<tr>
<td>25-34</td>
<td>32.7%</td>
<td>24.2%</td>
<td>25.8%</td>
<td>17.3%</td>
</tr>
<tr>
<td>35-44</td>
<td>33.4%</td>
<td>23.7%</td>
<td>22.3%</td>
<td>20.6%</td>
</tr>
<tr>
<td>45-54</td>
<td>40.3%</td>
<td>30.9%</td>
<td>28.8%</td>
<td>20.6%</td>
</tr>
</tbody>
</table>
Internet—Limits to use

What limits your use of the Internet?

- too expensive to use
  - Urban: 52.8%
  - Rural: 53.9%
- few people to communicate with via the Internet
  - Urban: 34.3%
  - Rural: 53.9%
- the Internet is very slow
  - Urban: 35.1%
  - Rural: 47.7%
- worried about surveillance/privacy invasion
  - Urban: 13.9%
  - Rural: 10.8%
- there is no interesting content for me
  - Urban: 10.3%
  - Rural: 10.8%
- lack of local language content
  - Urban: 1.6%
  - Rural: 0.0%

Computers and Internet—Change ISP

Would you be prepared to change your Internet provider if you were offered a higher speed or greater downloading capacity for the same price?

- No, for other reasons
  - All individuals: 7.0%
  - Rural: 4.6%
  - Urban: 9.0%
- No, because switching is too much effort
  - All individuals: 9.2%
  - Rural: 15.4%
  - Urban: 3.9%
- No, because you are satisfied with what you have
  - All individuals: 20.2%
  - Rural: 25.8%
  - Urban: 25.8%
- Yes
  - All individuals: 63.6%
  - Rural: 66.2%
  - Urban: 61.3%
Computers and Internet—Social media

Are you signed up for any online social network (Facebook, Mixit, Badoo, Twitter)?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>77.2%</td>
<td>22.8%</td>
</tr>
<tr>
<td>15-24</td>
<td>85.2%</td>
<td>14.8%</td>
</tr>
<tr>
<td>25-34</td>
<td>78.7%</td>
<td>21.3%</td>
</tr>
<tr>
<td>35-44</td>
<td>73.5%</td>
<td>26.5%</td>
</tr>
<tr>
<td>45-54</td>
<td>55.0%</td>
<td>45.0%</td>
</tr>
</tbody>
</table>

Internet—Non users

What are the reasons why you do not use the Internet? (multiple-select)

- I don’t know how to use it: 92.4%
- No computer / internet connection: 88.1%
- I don’t know what the Internet is: 85.0%
- No interest / not useful: 74.1%
- Too expensive: 65.5%
- None of my friends use it: 54.9%
- No time, too busy: 28.9%
- Is too slow, limited bandwidth: 10.9%
All of the major operators currently provide mobile money platforms to augment their other communication service offerings.

24.4% of individuals had sent or received mobile money.

17.0% reported having a bank account in a bank/microfinance/SACCO.

Mobile Money—Purpose

What do you use mobile money transfers for?

- 63.1% receive payments
- 68.4% airtime top up
- 59.0% Utility bill payments
- 10.0% Pay school fees
- 20.0% Pay for goods and services
- 5.2% Insurance Payments
- 5.9% Salary payments
- 3.2% Receive international remittances via Western Union

All individuals
- Rural
- Urban
**Expenditure on communication**

*Most mobile phones owners (86.7%) did not have an established budget for mobile phone use, but decided on case-by-case basis*

<table>
<thead>
<tr>
<th></th>
<th>All</th>
<th>Rural</th>
<th>Urban</th>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly free disposal income</td>
<td>19,400</td>
<td>15,200</td>
<td>38,600</td>
<td>15,100</td>
<td>24,600</td>
</tr>
<tr>
<td>Monthly expenditure on public phones</td>
<td>1,100</td>
<td>700</td>
<td>1,700</td>
<td>1,000</td>
<td>1,100</td>
</tr>
<tr>
<td>Monthly expenditure on mobile phone use</td>
<td>12,000</td>
<td>10,100</td>
<td>17,200</td>
<td>10,600</td>
<td>13,200</td>
</tr>
</tbody>
</table>
There is huge disparity in terms of access to different ICTs among the small businesses present in the EAs.

### Business access to ICTs

<table>
<thead>
<tr>
<th></th>
<th>Fixed line</th>
<th>Postal box</th>
<th>Computers</th>
<th>Internet access</th>
<th>Mobile phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>All businesses</td>
<td>0.8</td>
<td>0.6</td>
<td>1.5</td>
<td>0.8</td>
<td>63.6</td>
</tr>
<tr>
<td>Formality:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Informal</td>
<td>0.5</td>
<td>0.6</td>
<td>1.6</td>
<td>0.9</td>
<td>61.9</td>
</tr>
<tr>
<td>Semi-formal</td>
<td>2.9</td>
<td>0.7</td>
<td>1.3</td>
<td>0.3</td>
<td>76.5</td>
</tr>
<tr>
<td>Location:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rural</td>
<td>1.2</td>
<td>0.2</td>
<td>0.2</td>
<td>0.0</td>
<td>63.5</td>
</tr>
<tr>
<td>Urban</td>
<td>0.3</td>
<td>1.2</td>
<td>3.5</td>
<td>1.9</td>
<td>63.7</td>
</tr>
</tbody>
</table>

### Business communications

Does the business communicate with important ..... with any of the following?

- In person/Face to Face: 98.4%
- Fax: 96.9%
- SMS: 6.2%
- Email: 0.7%
- Mobile phone: 62.7%
**Business transactions**

How does your business transact financially with .....?

- **Cash**: 98.8% (Customers), 99.5% (Suppliers)
- **Mobile Money transfers**: 5.4% (Customers), 10.6% (Suppliers)
- **Send money with someone**: 7.0% (Customers), 10.0% (Suppliers)
- **Bank account transfer**: 0.0% (Customers), 1.9% (Suppliers)
- **Check/Cheque**: 1.3% (Customers), 1.8% (Suppliers)
- **Letter of Credit**: 0.0% (Customers), 0.6% (Suppliers)
- **Online banking**: 0.0% (Customers), 0.3% (Suppliers)
- **Western Union or Moneygram**: 0.0% (Customers), 0.2% (Suppliers)
- **Credit card**: 0.7% (Customers), 0.0% (Suppliers)

Institutions
**Institutional ICT access and usage**

*More institutions had postal boxes compared to households or businesses (reliance on written documents for communication)*

- Use mobile phones for institutional purposes: 87.1%
- Have a postal box: 54.3%
- Own any computers: 32.9%
- Working fixed line telephone connection: 17.1%
- Have Internet access: 12.9%
- Have an institutional website: 10.0%
- Provide institutional email to employees: 7.1%
- Working fax machine: 4.3%

**No Institutional computers**

*Why does the institution not have computers?*

- Too expensive/we can not afford computers: 74.5%
- No electricity to power computers: 48.9%
- No need for computers: 27.7%
- Computers are not available in my area: 19.2%
- Computer(s) broke down: 6.4%
- Computer(s) got stolen: 2.1%
No Institutional Internet access

Why does institution not have Internet access?

- Too expensive/I can not afford: 62.3%
- No need for Internet: 24.6%
- Not available in my area: 21.3%
- Use Public Internet access: e.g. Internet cafe: 16.4%
- Internet is too slow to use it: 4.9%

Discussion
Section 1:
Objectives, Survey Design and Organisation

Section 2:
Findings

Section 3:
Key Findings, Conclusions and Recommendations

**Gender—access and use of ICTs**

*Owned device, could use anytime*

<table>
<thead>
<tr>
<th></th>
<th>Owned a radio</th>
<th>Owned a mobile phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of individuals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All individuals</td>
<td>83.4</td>
<td>52.3</td>
</tr>
<tr>
<td>Female</td>
<td>82.0</td>
<td>44.4</td>
</tr>
<tr>
<td>Male</td>
<td>84.9</td>
<td>61.6</td>
</tr>
</tbody>
</table>

**Usage from any location (last 3 months)**

<table>
<thead>
<tr>
<th></th>
<th>Listened to radio</th>
<th>Watched TV</th>
<th>Used a computer</th>
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</thead>
<tbody>
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<td>Percentage of individuals</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All individuals</td>
<td>70.4</td>
<td>15.5</td>
<td>11.4</td>
<td>6.5</td>
<td>62.8</td>
</tr>
<tr>
<td>Female</td>
<td>67.0</td>
<td>13.9</td>
<td>9.2</td>
<td>6.0</td>
<td>57.2</td>
</tr>
<tr>
<td>Male</td>
<td>74.5</td>
<td>17.4</td>
<td>14.0</td>
<td>7.2</td>
<td>69.6</td>
</tr>
</tbody>
</table>
## Location—access and use of ICTs

*Owned device, could use anytime*

<table>
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<td><strong>Percentage of individuals</strong></td>
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<td></td>
</tr>
<tr>
<td>All individuals</td>
<td>83.4</td>
<td>52.3</td>
</tr>
<tr>
<td>Rural</td>
<td>83.7</td>
<td>46.6</td>
</tr>
<tr>
<td>Urban</td>
<td>82.0</td>
<td>77.9</td>
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</table>

## Usage from any location (last 3 months)

<table>
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</tr>
<tr>
<td>Rural</td>
<td>70.3</td>
<td>9.0</td>
<td>8.7</td>
<td>3.7</td>
<td>57.9</td>
</tr>
<tr>
<td>Urban</td>
<td>71.3</td>
<td>44.9</td>
<td>23.8</td>
<td>19.4</td>
<td>85.1</td>
</tr>
</tbody>
</table>

## Age—use of ICTs

*Usage from any location (last 3 months)*

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td><strong>Percentage of individuals</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All individuals</td>
<td>70.4</td>
<td>15.5</td>
<td>11.4</td>
<td>6.5</td>
<td>62.8</td>
</tr>
<tr>
<td>15—24</td>
<td>66.6</td>
<td>17.4</td>
<td>11.6</td>
<td>9.0</td>
<td>52.9</td>
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<tr>
<td>25—34</td>
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<td>9.9</td>
<td>3.9</td>
<td>10.2</td>
<td>67.1</td>
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<tr>
<td>35—44</td>
<td>62.7</td>
<td>15.2</td>
<td>8.8</td>
<td>4.3</td>
<td>63.3</td>
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<tr>
<td>45—54</td>
<td>80.8</td>
<td>10.9</td>
<td>17.0</td>
<td>4.2</td>
<td>66.3</td>
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<tr>
<td>55—64</td>
<td>76.9</td>
<td>7.5</td>
<td>2.6</td>
<td>0.1</td>
<td>63.6</td>
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<tr>
<td>65—74</td>
<td>75.8</td>
<td>5.1</td>
<td>0.3</td>
<td>0.0</td>
<td>59.3</td>
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<tr>
<td>75+</td>
<td>64.1</td>
<td>0.0</td>
<td>12.5</td>
<td>0.0</td>
<td>30.3</td>
</tr>
</tbody>
</table>
### Level of education—use of ICTs

**Usage from any location (last 3 months)**

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>All individuals</td>
<td>70.4</td>
<td>15.5</td>
<td>11.4</td>
<td>6.5</td>
<td>62.8</td>
</tr>
<tr>
<td>None</td>
<td>54.9</td>
<td>3.5</td>
<td>0.9</td>
<td>0.0</td>
<td>29.7</td>
</tr>
<tr>
<td>Primary (P1-P7)</td>
<td>69.6</td>
<td>6.4</td>
<td>4.0</td>
<td>0.2</td>
<td>59.5</td>
</tr>
<tr>
<td>Secondary: O-level (S1-S4)</td>
<td>81.0</td>
<td>27.8</td>
<td>15.8</td>
<td>5.1</td>
<td>86.0</td>
</tr>
<tr>
<td>Secondary: A-level (S5-S6)</td>
<td>78.4</td>
<td>50.5</td>
<td>37.4</td>
<td>29.7</td>
<td>94.9</td>
</tr>
<tr>
<td>Tertiary: diploma/certificate:</td>
<td>85.9</td>
<td>51.4</td>
<td>46.7</td>
<td>39.2</td>
<td>97.1</td>
</tr>
<tr>
<td>Tertiary: BSC/BA:</td>
<td>90.0</td>
<td>60.5</td>
<td>76.6</td>
<td>69.6</td>
<td>100.0</td>
</tr>
<tr>
<td>Tertiary: Masters:</td>
<td>75.6</td>
<td>87.8</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
</tbody>
</table>

### Main activity—use of ICTs

**Usage from any location (last 3 months)**

<table>
<thead>
<tr>
<th></th>
<th>Listened to radio</th>
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<th>Used a computer</th>
<th>Used the Internet</th>
<th>Used a mobile phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>All individuals</td>
<td>70.4</td>
<td>15.5</td>
<td>11.4</td>
<td>6.5</td>
<td>62.8</td>
</tr>
<tr>
<td>Employed</td>
<td>82.3</td>
<td>37.5</td>
<td>38.0</td>
<td>26.1</td>
<td>90.5</td>
</tr>
<tr>
<td>Self-employed</td>
<td>75.0</td>
<td>14.8</td>
<td>9.8</td>
<td>4.1</td>
<td>71.4</td>
</tr>
<tr>
<td>Unemployed</td>
<td>54.9</td>
<td>6.4</td>
<td>6.8</td>
<td>3.3</td>
<td>41.8</td>
</tr>
<tr>
<td>Unpaid housework (e.g. housewife)</td>
<td>69.8</td>
<td>12.8</td>
<td>2.5</td>
<td>1.8</td>
<td>50.6</td>
</tr>
<tr>
<td>Retired</td>
<td>77.2</td>
<td>14.1</td>
<td>9.7</td>
<td>4.7</td>
<td>65.3</td>
</tr>
<tr>
<td>Student/Pupil</td>
<td>72.7</td>
<td>29.3</td>
<td>26.6</td>
<td>23.6</td>
<td>57.6</td>
</tr>
</tbody>
</table>
Trends in individual access to ICTs

Trends in individual access to ICTs (2008—2014)

- Owned a Radio
  - 2008: 68.4%
  - 2012: 76.2%
  - 2014: 83.4%

- Owned a computer
  - 2008: 2.5%
  - 2012: 3.8%
  - 2014: 20.7%

- Owned a mobile phone
  - 2008: 2.5%
  - 2012: 3.8%
  - 2014: 46.7%

Trends in individual usage of ICTs

Trends in individual use of ICTs (2008—2014)

- Listened to Radio
  - 2008: 87.3%
  - 2012: 82.3%
  - 2014: 70.4%

- Used a mobile phone
  - 2008: 20.7%
  - 2012: 27.5%
  - 2014: 62.8%

- Used a computer
  - 2008: 15.5%
  - 2012: 11.4%
  - 2014: 70.8%

- Used the Internet
  - 2008: 5.8%
  - 2012: 4.8%
  - 2014: 6.5%

- Used a public telephone
  - 2008: 14.8%
Mobile phones—QoS

Are you happy with your current service provider? (answered YES)

- 53.1% of all individuals are happy with their service provider.
- 57.9% of urban individuals are happy with their service provider.
- 51.3% of rural individuals are happy with their service provider.

Mobile phones—MNP

Would you consider changing your service provider if you could keep your number? (answered YES)

- 12.3% of all individuals would consider changing their service provider.
- 19.6% of urban individuals would consider changing their service provider.
- 9.7% of rural individuals would consider changing their service provider.
Mobile phones—Policy & strategy

For policy purposes, UCC needs to differentiate between mobile phone ownership, SIM ownership and access to mobile phones

Address factors that make access to communications expensive (cost of handsets and cost of usage)

Address factors that lead to poor coverage especially in rural areas

Address factors that make access to power impossible, difficult or expensive

Recommendations

i. Use of mobile phones declined for the first time ever in Uganda. Tax Policy negating impact of full liberalisation and RCDF efforts?

ii. Radio remains most ubiquitous and non-discriminating channel for government to citizen (G2C) communication.

iii. Television access remains preserve of a very small minority that is relatively well off. How then do we best fund digital migration?
Reinvent use of postal services and facilities: accelerate on going definition of geo-defined postal codes to facilitate last mile access for e-commerce; one-stop-centre for e-gov.

Revisit concept of using one’s SIM in a public phone or other device. Lower cost of usage drastically to widen access.

Support small businesses through enabling affordable access to and effective use of ICTs

The survey: Is this the best way of doing this? How about impact? Move to the next level!