The Lived Costs of Communications

Experiencing the lived cost of mobile communications in low and very low income households in urban South Africa 2014

Luci Abrahams and Kiru Pillay, LINK Centre

A R2K and LINK Centre Research Project

FOREWORD

The cost of communication has often been simply understood in quantitative terms, applying a certain monetary amount to the cost of a phone call or access to the Internet. This monetary amount only explains part of the story, however, as it does not necessarily capture an individuals "lived" experience trying to access their right to communicate. This report is based on research commissioned by the Right2Know Campaign and conducted by the LINK Centre at the University of Witwatersrand and aims to illuminate these lived experiences associated with the cost to communicate.

As a campaign that advocates for every South African's right to communicate, Right2Know does not believe an individual should have to negotiate between putting food on their table and accessing communication technologies. However, this negotiation is not often present in discussions about the cost of communication. Understanding how South Africans experience the struggle to afford airtime, data or access to the Internet is a way to demonstrate the "true" cost of communication and advocate for policy and community action that upholds the right to communicate.

This report combines quantitative and qualitative research conducted by the LINK Centre as part of 5 focus groups in 3 provinces: Gauteng, the Western Cape and Kwazulu-Natal. The participants in these focus groups discussed their relationship with communications technologies and the various struggles they experience exercising their right to communicate. It is the hope of the Right2Know Campaign that this research will expand our understanding of the cost of communication and advocate for a rights-based approach to telecommunications policy. The "lived" experiences outlined in this report too often lean towards a struggle to pay for basic communications and barriers to access next generation networks that offer high speed Internet. An alternative future is possible where the "lived" experiences will include, instead, a sense of hope, optimism and possibility with regards to communications technologies.

EXECUTIVE SUMMARY

In considering the lived cost of communications in urban South Africa, and noting the effective mobile substitution of voice and the emergence of mobile apps and mobile Internet, this exploratory research sought to understand how mobile phone users experience ownership of mobile phones and the cost of ownership, access and usage. The report represents an initial exploration into this "lived experience", as a basis for (i) understanding mobile communications from the perspective of the user; and (ii) a future investigation into the strengths and weaknesses of existing policy and regulation from the perspective of the lived experience.

The research, conducted through focus groups composed of participants from low-income (ZAR6,400 – ZAR3,201 per month) and very low-income (ZAR3,200 per month and below) households in three cities, Johannesburg, Cape Town and Durban, revealed three major findings.

Value for money: The experience of mobile communications of the majority of participants was limited to making calls, receiving calls, sending or receiving SMS's and instant messages. Few participants living in low and very low-income households experience the wide array of communications services and mobile Internet communications that are on offer. This is largely because price levels are out of alignment with household income levels. Despite the high price for communications relative to household income, the majority of participants used private access, not public access. This indicates the limitations of both private and public access to mobile communications and the Internet for these income groups. Most focus group participants expressed the need for affordable, low-cost mobile communications, rather than "free airtime" packages, which in their design often did not meet the needs of these consumer groups.

Consumer rights, consumer protection and scams in the mobile communications environment: The focus group sessions indicate that consumers are very concerned about possible scams that have negative financial implications, and are not clear on how to manage these risks. Quality of service was of some concern, though not major concern, but should be further explored from a regulator's perspective. Consumers participating in the focus groups have explicitly expressed the need for regulation of consumer protection, hence the agenda for social regulation should include greater attention to consumer rights and consumer protection.

Lived experience of digital futures versus policy and regulation: The focus group discussions indicate that the agenda for communications policy and economic regulation should explicitly include the needs of mobile communications users with household income below ZAR6,400 per month. This is important with respect to fostering a digital future in which the majority of households can experience the array of possible benefits from mobile communications technologies, services and content.

GLOSSARY OF TERMS

lived cost	how people experience the benefit and cost of a good or service
mobile apps	software applications on a mobile device
mobile Internet	Internet accessed on a mobile device
rhoqo	a mobile phone that only receives calls
SMS	short message service
sims	sim-cards
starter pack	a telecoms service package at entry level pricing for the first time user to get started, for either voice of Internet communications that includes a sim-card and limited airtime for voice; or a sim-card or 3G dongle or other basic connectivity equipment with limited data bundles

TABLE OF CONTENTS

SECTION 1 EXPERIENCING COMMUNICATIONS IN SOUTH AFRICA: INTRODUCTION AND RESEARCH OBJECTIVES

In an effort to understand how South Africans experience the cost of communications, the trade-offs they make in their lives to afford communications, and the impact on their ability to afford the cost of living generally, the Right2Know organisation comissioned research on the "lived cost of communications", including mobile cellular communications and mobile Internet. The research sought to create an understanding of whether consumers feel they are getting value for money and quality of service. The LINK Centre at the University of Witwatersrand undertook the focus group research.

1.1 Objectives of the research

In considering the lived cost of communications in urban South Africa, and noting the effective mobile substitution of voice and the emergence of mobile apps and mobile Internet, this exploratory research sought to understand how mobile phone users experience ownership of mobile phones, access to mobile communications and the cost of ownership and access. The report represents an initial exploration into this "lived experience", as a basis for (i) understanding mobile communications from the perspective of the user; and (ii) a future investigation into the strengths and weaknesses of existing policy and regulation from the perspective of the lived experience.

South Africa's four mobile operators (MTN, Vodacom, Cell C and Telkom Mobile) and two fixed operators (Telkom and Netoel) have built an extensive electronic communications network across the length and breadth of South Africa in the past 18 years. Ownership of mobile phones is high across income levels, with the majority of consumers using pre-paid access[1]. Amongst low income households, a number of practices have emerged to maximize the value of mobile communications, including practices such as the usage of multiple sim-cards (sims) to maximize the savings from making on-net calls and to eliminate the costs of off-net calls and buying multiple "starter packs", in order to leverage the special rates and low-cost deals offered by operators. The regulated reduction of mobile termination rates over the period 2010 – 2013 has led to more competitive pricing in the pre-paid mobile market, yet, prices for prepaid mobile remain high in relation to household income, as further discussed in Section 2.

While operators have brought down prices in an attempt to offer more competitive rates, the campaign work of R2K in low-income communities suggests that these reductions have had limited impact on the ability of households to afford the services. The disparity between the cost reductions introduced by mobile operators and the lived cost experience of low-income users is a subject that needs more careful attention. Furthermore, as mobile apps become increasingly popular amongst mobile users, it is not clear whether low-income households use mobile apps and mobile Internet access extensively. As mobile becomes a dominant technology in society and innovation occurs in the capacity of the device and the associated services, it is of broad interest to know to what extent the majority of the population, namely low-income households, are participating in the mobile revolution. Hence, the purpose of this particular study is to capture, in the words of the users, a perspective on the affordability of

[1] Gillwald, A., Moyo, M. & Stork, C. (2012). Understanding what is happening in ICT in South Africa – A supply- and demand-side analysis of the ICT Sector. Evidence for policy action, Policy Paper 7, 2012, Research ICT Africa, Cape Town

mobile communications usage and its impact on the ability of users to maximize the potential of these information and communication tools.

1.2 Research Methodology

The investigation adopted a mixed methods approach with greater emphasis placed on a qualitative data collection strategy. Documenting lived experiences and deriving in-depth knowledge is best achieved by qualitative research methods. For this reason focus groups were used as the primary research method. The survey component of the research[2] was conducted in order to create a profile of the research participants, in terms of their household context, income levels, and broad trends in mobile access.

Focus group methods of data collection introduce the benefit of group interactive discussion as a means to gaining a more complex sense of the research problem than is achieved through a simple one-on-one interview.[3] This means that a more complex data set emerges in the focus group as participants engage with each other to reveal more about the subject under discussion, each highlighting particular facets of the problem. In this situation, the researcher may play the role of facilitator, in the sense that a broad set of questions are presented to frame the discussion, but the researcher does not intervene or direct the conversation. The role of the researcher is to prompt the discussion towards filling in any gaps in the data. While some of the data may initially appear anecdotal, the focus group discussion generally reveals whether the data reflects common experiences or alternative experiences. Finding common experiences within a focus group and across multiple focus groups suggests a reasonable degree of validity and generalizability of the data, due to the triangulation, which has occurred across focus groups held in different settings or geographies. The method is particularly useful for exploratory research on lived experience, where the researcher is enquiring into the nature of the experience and the participants' interpretation of that experience.

The focus groups in this study comprised of between 13 and 17 particpants, which was small enough to give everyone the opportunity to express an opinion, but still large enough to provide a diversity of opinions. The focus groups were useful for generating information on collective views, and the meanings that lie behind those views. They also provided a rich understanding of participants' experiences and beliefs.

1.3 The Five Focus Groups

Five focus groups were held during the month of October 2014 in the cities of Joburg (Gauteng), Cape Town (Western Cape) and Durban (KwaZulu-Natal).

Gauteng is geographically the smallest of the nine provinces, but is also the economic hub of South Africa with the largest population, estimated at 12.3-million.[4] **Soweto** is the largest urban residential township in South Africa and is located in the City of Johannesburg Metropolitan Municipality. 98.5% of the population is Black African and 1,271,628 residents live in 355,331 households.[5] According to Census 2011 data,[6] 584,326 individuals had no income, while 467,941

---

[2] The survey and focus group data collection instruments are attached as Appendix A and B respectively.

[3] Babbie, E., & Mouton, J. (2001). *The practice of social research*. Cape Town: Oxford University Press, pp.291-293

[4] www.statssa.gov.za/Census2011/Products/GP_Municipal_Report.pdf

[5] census2011.adrianfrith.com/place/798026

[6] Statistics South Africa (2013). Census 2011. Pretoria: Statistics South Africa (StatsSA). Table created from data published on StatsSA website.

had an individual monthly income of ZAR6,400 or less, and 75,286 had an individual monthly income of more than ZAR6,400 (noting that there were 140,162 individuals for whom monthly income was not specified). The focus group was held in Soweto, at a school in Moletsane. The school is no longer in use for public education, but is maintained and run by a group of community activists to provide a range of community-oriented development services.

The **Western Cape** is geographically the fourth largest of the provinces with an estimated population of 5.8-million inhabitants.[7] The focus groups were held in Mitchells Plain and Khayelitsha. **Mitchells Plain,** another of South Africa's large townships is located about 32 km from the City of Cape Town, and has an estimated population of 310,485 people, living in 67,995 households, of diverse class backgrounds. According to the City of Cape Town Census 2011 report[8], 90.8% of the population is Coloured, 31.6% was either younger than 15 or older than 65, and 24% of the labour force was unemployed. Household income estimates indicate that monthly household income was ZAR3,200 or less for 38.2% of the population and ZAR6,400 or less for 58.3% of the population.[8] The focus group was held at a house in Eastridge, one of the poorest communities in the Western Cape. **Khayelitsha** township, located along the N2 highway some 50 kilometres from Cape Town, has a population of approximately 391,749 people living in 118,809 household.[9] Like Mitchell's Plain, Khayelitsha is a mix of low income and lower-middle income households. According to the City of Cape Town Census 2011 report,[8] the demographic makeup of Khayelitsha was 99% Black African, 51% of the population was either younger than 15 years or 65 years and older, and 38% of the labour force was unemployed. 73,8% of households had a monthly income of ZAR3,200 or less, 88% of households had a monthly income of ZAR6,400 or less and approximately 55% of households lived in informal settlements. The focus group was held at the Khayelitsha Community Development Centre.

Kwazulu-Natal is geographically the seventh largest of the nine provinces. It has an estimated population of 10,267,300.[10] Household income is not included here because the participants came from a variety of areas. For the first focus group, participants were transported to the venue from the following suburbs of Durban: Ntuzuma, Mobeni Heights, Inanda, Lamontville, Umlazi, Wentworth. The second focus group was drawn from UKZN students originating from rural areas, specifically Newcastle, Umzimkhulu, Mtata, Ixopo, Ngontameni, Empangeni, Bizana and Ladysmith, representing an urban-rural perspective. The two focus groups were held at the Wylie House Children's Home in Berea and at the R2K regional office based at the University of KwaZulu-Natal (UKZN), located in Glenwood, Durban.

7 www.statssa.gov.za/Census2011/Products/Provinces-at-a-glance.pdf see Table 1.1 of Appendix
8 www.capetown.gov.za/en/stats/2011CensusSuburbs/2011_Census_CT_Suburb_Mitchells_Plain_Profile.pdf
9 www.capetown.gov.za/en/stats/2011CensusSuburbs/2011_Census_CT_Suburb_Khayelitsha_Profile.pdf
10 www.statssa.gov.za/Census2011/Products/KZN_Municipal_Report.pdf

1.4 Focus Group Demographics

At the outset of the focus group sessions the participants were asked to complete a short survey. The survey was intended to build a profile of the focus group participants, as well as a broad perspective of mobile phone ownership and access to voice and Internet, at both a household and individual level. The survey instrument (see Appendix B) gathered data under the headings of "Household Profile and Access" and "Individual Profiles, ICT Access and Usage". Selected information from the survey is presented in this section of the report.

In total, 79 people took part in the focus groups and in the survey, constituted as follows:

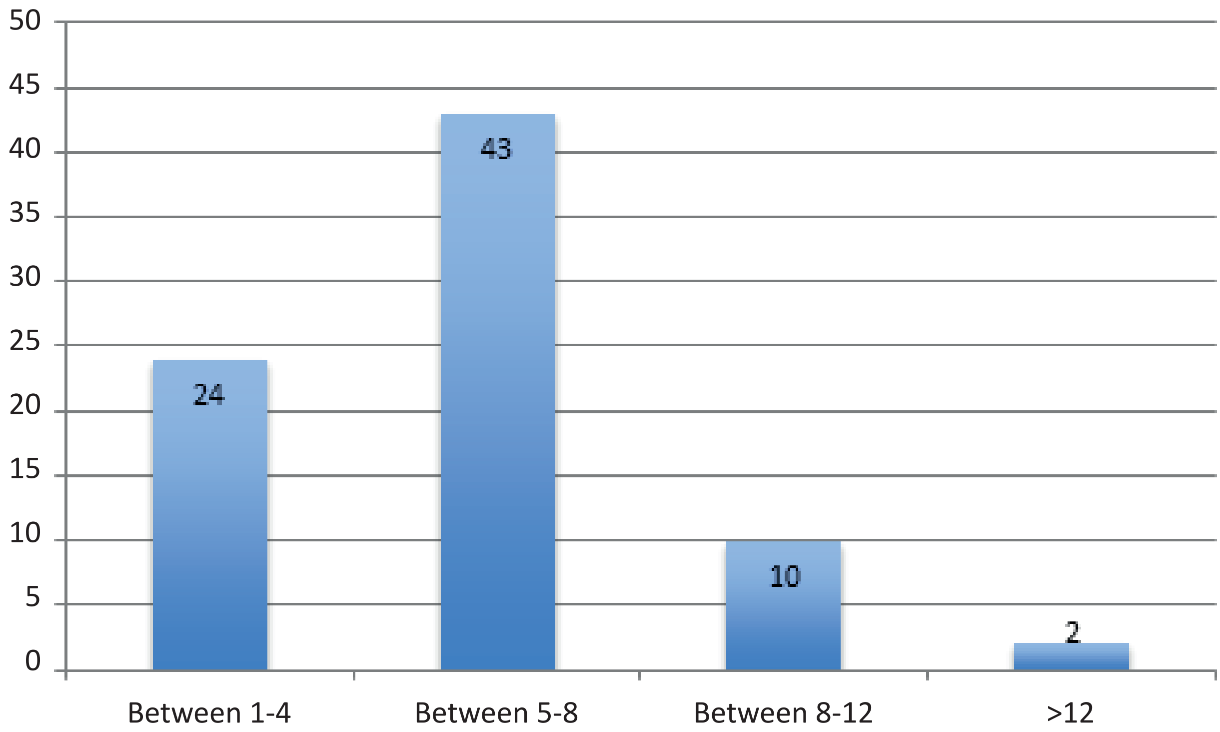
- Berea Durban Focus Group – 14 participants
- UKZN Durban Focus Group – 16 participants
- Khayelitsha Focus Group – 15 participants
- Mitchells Plain Focus Group – 17 participants
- Soweto Focus Group – 17 participants

Of the 77 responses received that related to the question of the race of the households, the majority of the households were African (61 or 79.2%), with a small number of Coloured households being represented (16 or 20.8%). There were no White or Indian households in the sample.[11]

The following section describes the household demographics of the participants.[12]

1.4.1 Household Composition

Figure 1: Household composition



[11] White and Indian households are significantly small within the population

[12] Even though 79 surveys were administered, not all responses were valid and neither were all the questions answered by all respondents which means that the number of responses do not always add up to 79

Twenty-four of the households, or 30% had between one and four occupants. The majority of households (43 or 54.4%) were composed of between five and eight members, with 10 households having between eight and twelve members. Two households had more than 12 occupants, with one housing 18 and the other 21 people. In the 18-member household, nine were students while in the 21-member household, 11 were students.

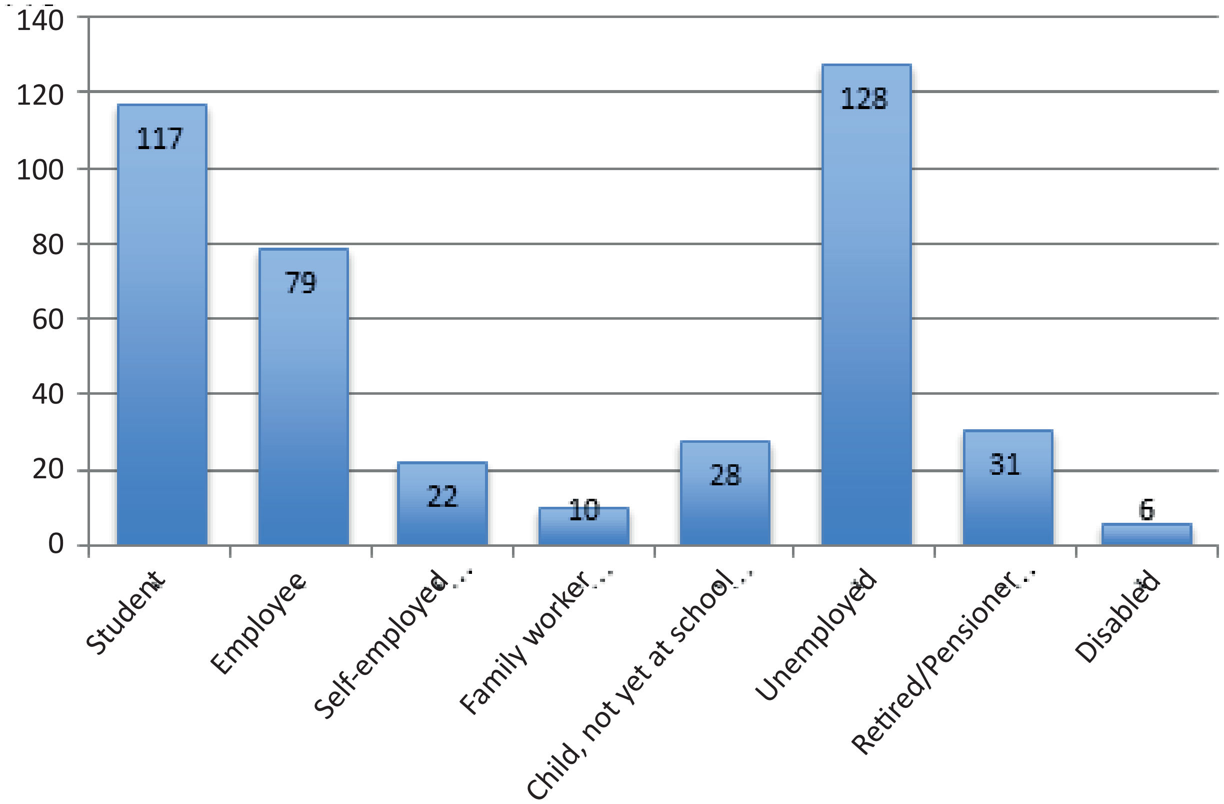
1.4.2 Employment

The 79 households housed a total 478[13] people whose employment status can be broken down as follows (Figure 2):

- 117 were students
- 79 were employees of an organisation
- 22 were self-employed
- 10 were family workers
- 28 were children who are not yet in school
- 128 were unemployed
- 31 were retired and
- 6 were disabled

The two groups most represented were students (27.7 %) and the unemployed (30.4%).[14]

Figure 2: Household employment status



The country's unemployment rate is recorded as 25.4%[15] by Statistics South Africa in their Quarterly Labour Force Survey (QLFS) released on 29th July 2014. The QLFS also indicates the number of 'discouraged job seekers' at 2,355,000.

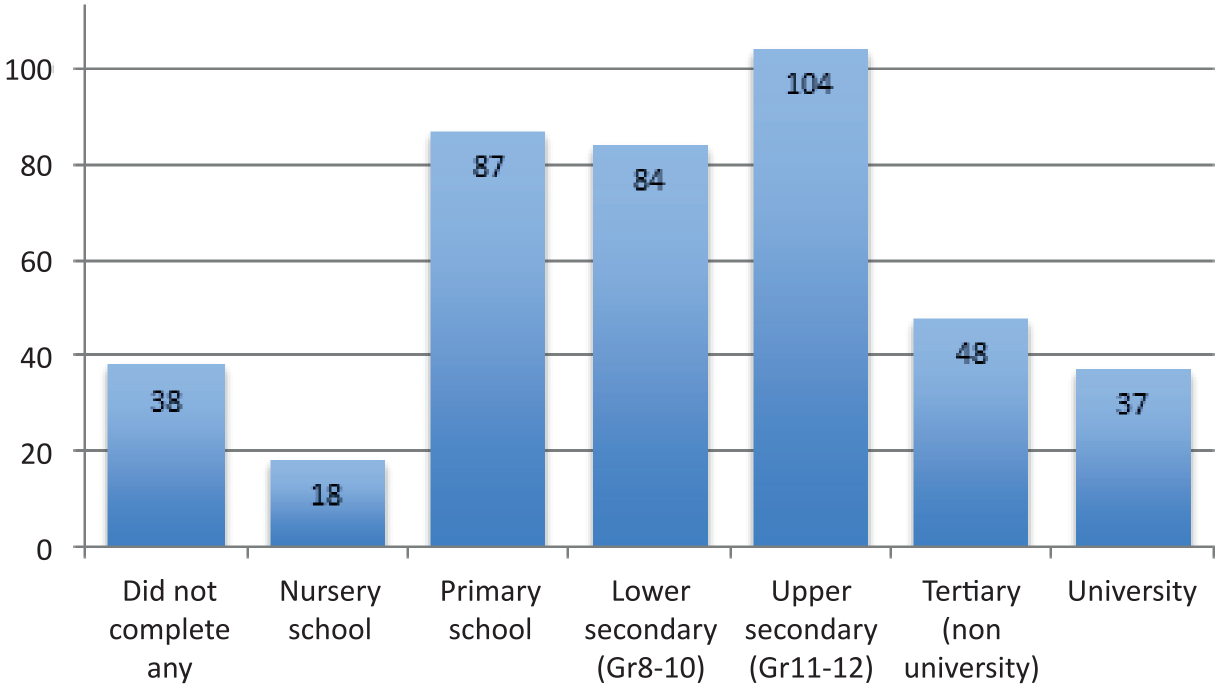
[13] While the first question revealed that the households consisted of 478 people, only the status of 421 were reported on.

[14] These percentages were calculated from the total of 421 that were reported on

[15] beta2.statssa.gov.za/publications/P0211/P02112ndQuarter2014.pdf

1.4.3 Education Levels

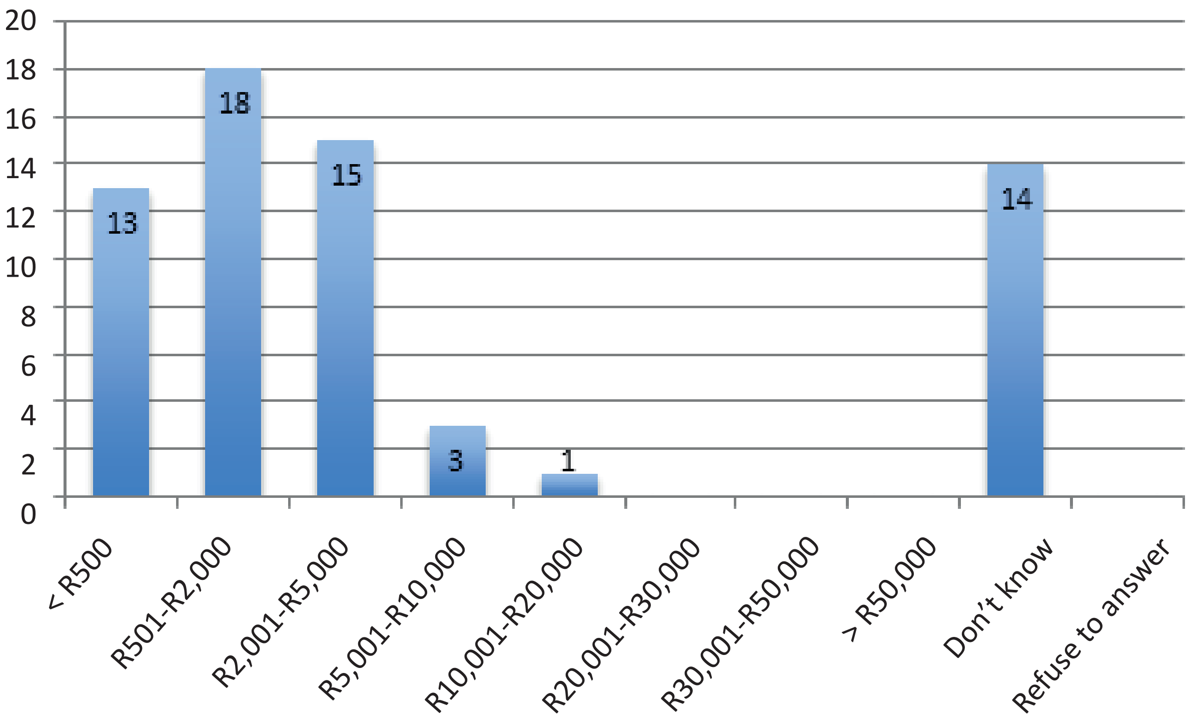
Figure 3: Household education levels



Data regarding education levels was gathered for 416 members of households. A total of 87 or 20.9% of people had a primary school education, while 84 or 38.8% had completed lower secondary, with 104 or 25% having completed either grades 11 or 12. Just 8.8% of people had a university qualification. Higher Education South Africa (HESA) reports participation in higher education to be 17.3%, though participation is heavily skewed by race.[16]

1.4.4 Household Income

Figure 4: Household Income



16 www.hesa.org.za/sites/hesa.org.za/files/HESA_Portfolio Committee Presentation_5 March 2014_Final.pdf

There were 64 responses to the question on household income. Thirteen households had a household income of less than R500 per month while eighteen households had an income of between R501 and R2,000. This represents 48.4% of the sample.

The 2010 QLFS states that South African employees who were in paid employment had median monthly earnings of R2,800. The median monthly earnings for men (R3,033) were higher than that for women (R2,340), in other words women in paid employment earned only 77,1% of what men did.[17]

1.5 Overview of the Right2Know[18] campaign and the LINK Centre[19]

The **Right2Know** campaign, launched in August 2010, is a coalition of civil society organisations, community groups, social movements and social advocates, initially established to respond to the Protection of State Information Bill (the Secrecy Bill). The Campaign quickly broadened its scope to tackle related issues. The Right2Know Campaign operates in four provinces – the Eastern Cape, Gauteng, KwaZulu-Natal and the Western Cape. The R2K vision is:

> *We seek a country and a world where we all have the right to know – that is to be free to access and to share information. This right is fundamental to any democracy that is open, accountable, participatory and responsive; able to deliver the social, economic and environmental justice we need. On this foundation a society and an international community can be built in which we all live free from want, in equality and in dignity.*

The **LINK Centre** conducts academic research on public policy, sector regulation and innovation in the field of electronic communications and ICT (information and communications technology) in Southern Africa. As the ICT sector contributes to e-transformation in other sectors of the economy and in the lives of people, LINK's research aims to document and analyse these transitions and transformations, and thereby to contribute to future policy formulation and sectoral innovation. Furthermore, LINK aims to provide comment and guidance with respect to the regulatory frameworks that impact on the broad electronic communications sector, including e-services and e-government. LINK's postgraduate and certificate programmes are designed to foster greater knowledge amongst all players in the electronic communications, ICT and Internet sectors. LINK is located in the Faculty of Humanities, in the School of Literature, Language and Media (SLLM) at the University of the Witwatersrand. LINK has developed its policy influence in South and Southern Africa, drafting policy recommendations and strategy for government, in addition to its public-interest policy work.

[17] www.statssa.gov.za/Publications/P02112/P021122010.pdf

[18] www.r2k.org.za

[19] www.wits.ac.za/linkcentre/16569/link.html

SECTION 2 COMMUNICATIONS CONTEXT AND SURVEY-BASED PROFILE OF URBAN COMMUNICATIONS USAGE

Section 2 of the report presents a background perspective on the mobile electronic communications sector, notably mobile voice, mobile apps and mobile Internet.

According to the SA and SADC Media Facts 2014 survey,[20] while 44% of households live on an income of less than R5000 per month, there were 134.8 mobile subscribers per 100 people in 2014 (not accounting for multiple sims and machine uses). An AMPS report[21] indicates that 37.2m adults in SA (or 97%) can be reached through a mobile phone in the household (2.4 phones per household). The Media Facts survey reported that 18.3% of households had a computer, 9.8% had Internet access, 41% of South Africans were Internet users and 27% had accessed the Internet in the four weeks prior to the survey, with lower usage being amongst the Black population at 22%. Local online media in South Africa is extensive including the categories of business and finance; motoring; news, industry news, community news and current affairs; marketing; sport and other categories. Online educational media is a small but growing content area. Mobile advertising is big business and more than eight million adults had accessed the Internet from their mobile phone in the 7 days prior to the survey, in order "to read web/mobi sites, participate in social media such as Twitter and Facebook, watch video and other content."[19] The survey reports that advertising via mobile includes SMS, call-me adds, mobile links to promotions, notification of deals available at the point-of-sale, e-newsletters and other forms of advertising.

A Research ICT Africa[22] policy paper describes pricing in the prepaid mobile market in South Africa as follows: Using an international benchmark for price, namely the Organisation for Economic Co-operation and Development (OECD) 2010 prepaid lower-user mobile basket (40 calls per month), the report gives MTN's 2012 cheapest lower-user basket price as ZAR167 and Vodacom's 2012 cheapest lower-user basket as ZAR138. In the first quarter of 2013, prices were reduced with MTN and Vodacom prices for the OECD lower-user basket estimated at ZAR122, Cell C's low-user basket price closer to ZAR100 and Telkom Mobile's price at ZAR103. Telkom Mobile was reported as offering the lowest price, a promotional offer of on-net and off-net price at ZAR0.95 per minute. The policy paper also reports that 26% of urban mobile users download apps to their mobile phone, 20% read and write emails, 8.6% send or receive money and mobile broadband is cheaper than fixed.[21]

Thus, an atypical South African household with income below ZAR5,000 per month, comprised of two adults only, could make 40 calls per month (approximately one call per person per day) for approximately R120 each (4.8% of monthly income of ZAR5,000), noting that a significant majority of subscribers would get this price as MTN or Vodacom customers. In a more typical household of 3.5 persons, with household income below ZAR6,400 per month, each household member could make approximately one call per day for approximately R120 each (approximately 6.5% of monthly income of ZAR6,400).

[20] www.omd.co.za/media_facts/Blueprint_2014_OMG Media facts.pdf

[21] www.slideshare.net/RaymondB/mobile-in-south-africa-2014-amps

[22] Gillwald, A., Moyo, M. & Stork, C. (2012) Understanding What is happening in ICT in South Africa – A supply- and demand- side analysis of the ICT Sector. Evidence for Policy Action, policy Paper 7, 2012, Research ICT Africa

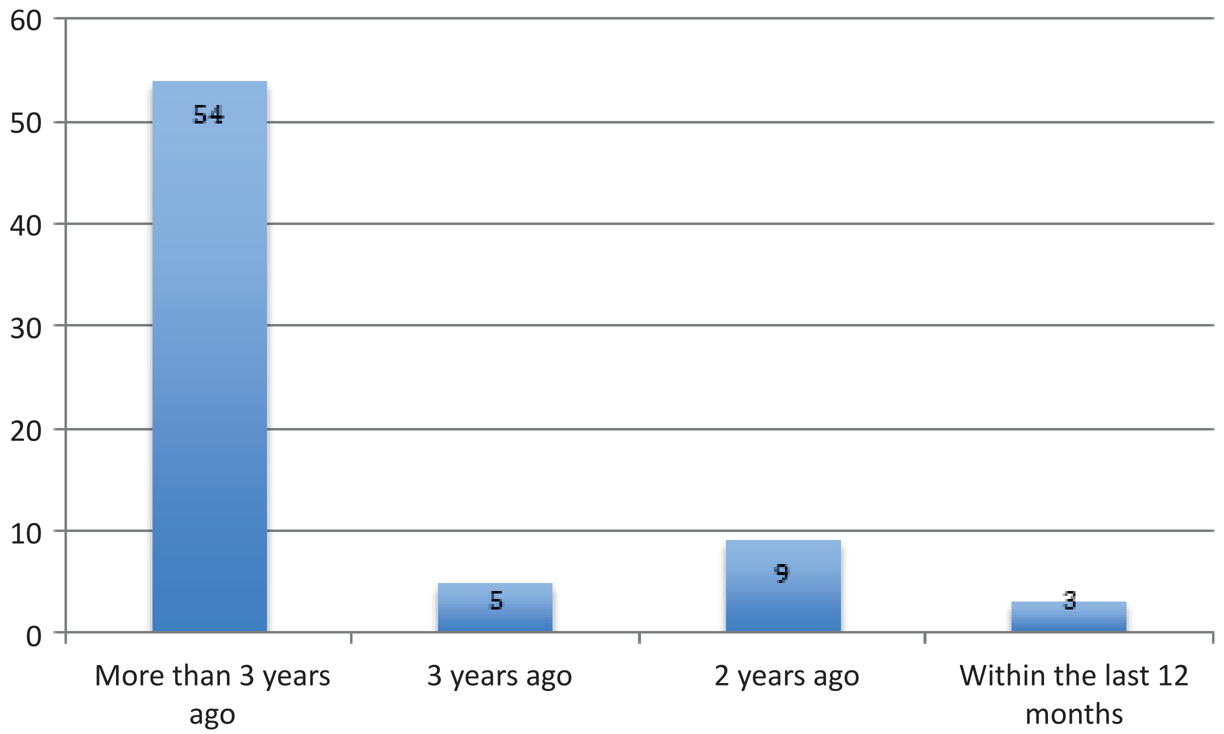
2.1 Ownership and Access

This section presents data on individual ownership, access to mobile phones and access to the Internet from a mobile phone amongst the focus groups.

2.1.1 Household ownership of mobile phones

Four households indicated that no member of the household owns a cell phone. Two of these households were in Mitchells Plain, one was in Khayelitsha and one was the household of a university student (UKZN focus group). For the vast majority of households that did own at least one cell phone, there was a high correlation between the number of people and the number of phones in the household.

Figure 5: Length of time having a mobile phone



Of the 71 respondents who completed the question on duration of ownership, 54 (76%) indicated that the first phone in the household was acquired more than three years ago. This would indicate a level of sophistication or at very least familiarity with the technology. Only three households had acquired phones in the last 12 months.

2.1.2 Individual ownership of mobile phones

With respect to individual ownership of cell phones the following was recorded:

- 43 respondents had one SIM
- 19 respondents had two SIMs
- 8 respondents had three SIMs and
- 1 respondent had four SIMs

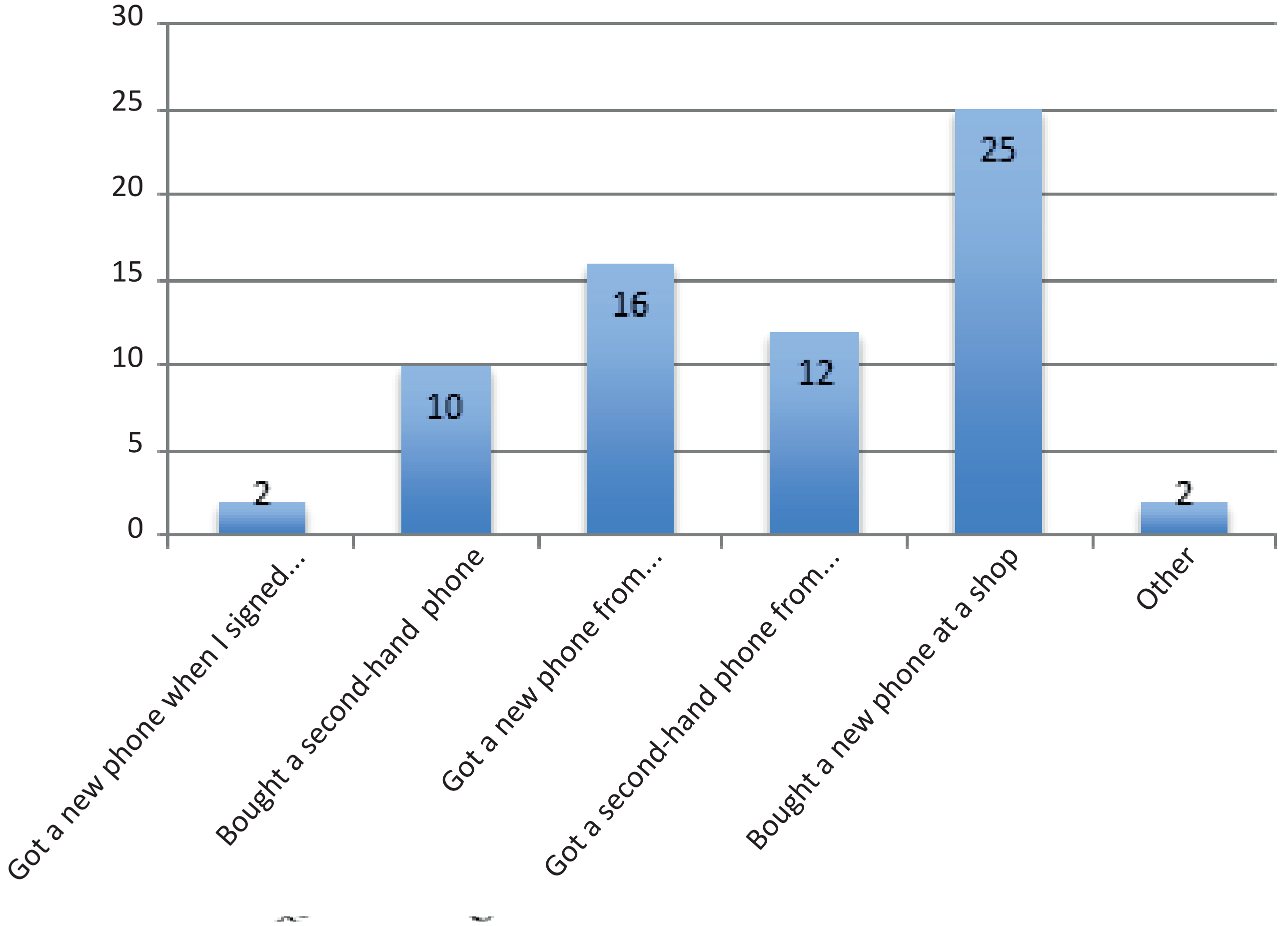
Only one respondent did not have an active SIM card. There were 7 blank responses to this question. An overwhelming majority of respondents (64 out of 66 responses or 96.9%) had prepaid contracts. Of the remaining two respondents, one had a contract and one had both.

2.1.3 Most frequent uses for the mobile phone

The top three uses of the mobile phone were reported as making phone calls, receiving phone calls and social networking e.g. Facebook. It must be noted that this question was not well answered with some respondents choosing more than the three options, as specified in the question. These responses were ignored. In total 51 responses were considered valid.

Twenty-five of 67 respondents indicated that they own a new cell phone, which they had bought at an outlet with no contract attached. This represents 37.3% of respondents. Two respondents received new phones as part of a postpaid contract. Sixteen respondents received new phones from family or friends. From the above data, it can be summarised that the majority of respondents had new cell phones i.e. 43 out of 67 or 64.1% (see Figure 6).

Figure 6: Mobile phone acquisition



Twenty-two of the remaining 24 respondents were in possession of used phones, either purchased or received from family or friends.

2.1.4 Internet Access via mobile phone

Figure 7: Internet access via mobile phone

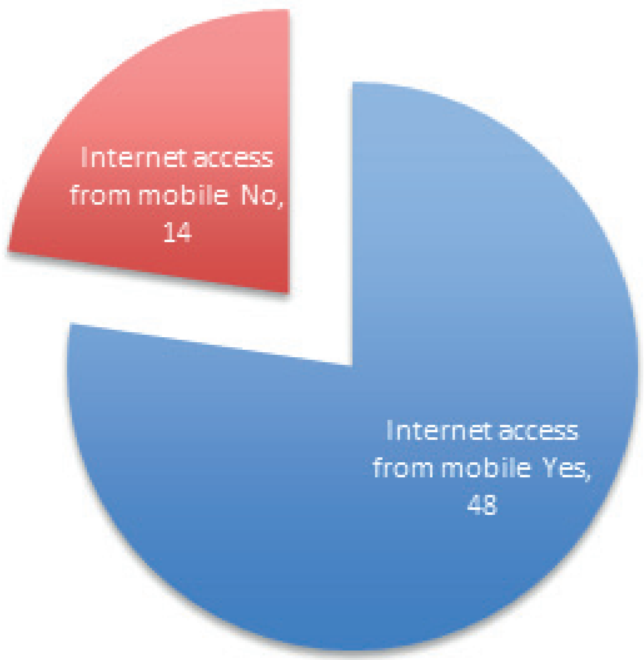


Figure 8: Recent Internet usage

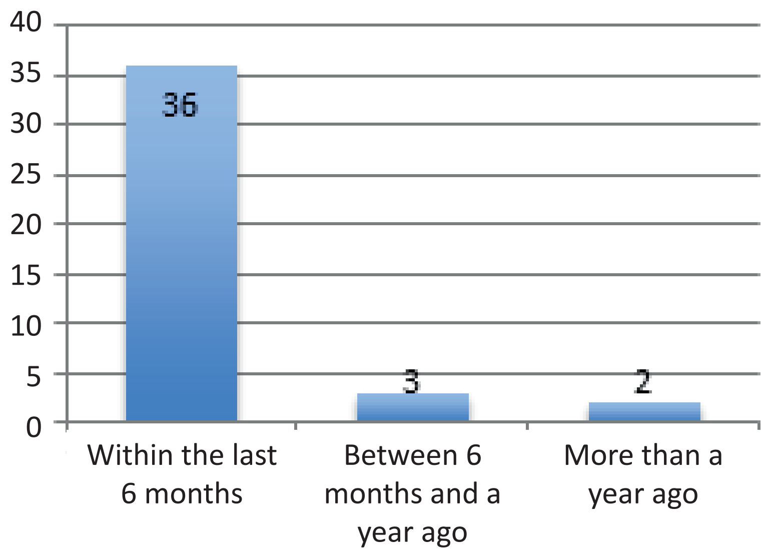
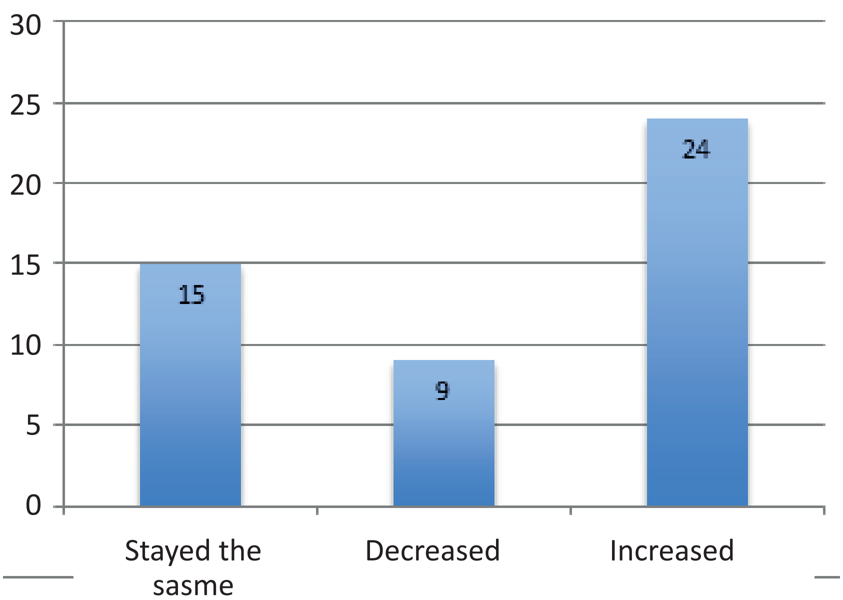


Figure 9: Change in access



The majority of respondents (48 out 62 responses or 77.4%) have accessed the Internet from their mobile phones. Thirty-six indicated that they had done so in the last six months (see Figures 7 and 8). Fifty percent of respondents indicated that the frequency of access to the Internet had increased compared to six months ago (Figure 9). This indicates that mobile Internet access is relatively recent in the communities where focus groups were held.

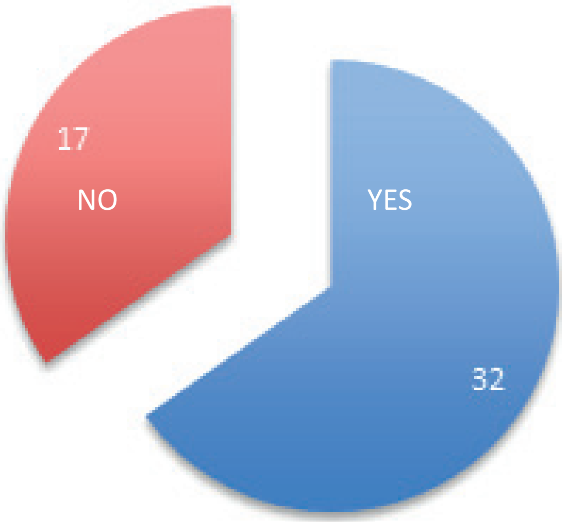
2.1.5 Reasons for Internet Usage

The top three reasons for accessing the Internet were reported as:

- Looking for information about education, training or course offers
- Sending and receiving emails and
- Looking for a job or sending a job application

With respect to the downloading of apps, 32 of 47 respondents, which represents 65.3%, reported having downloaded mobile apps (Figure 10).

Figure 10: Mobile apps usage



2.2 Summary of survey results

The survey sought to provide a socio-demographic profile of the focus group participants, their mobile phone ownership and usage. It was not the primary data collection method. While the data can be generalised to the broader population of low income and low-middle income households, it is the recommendation of the researchers that additional surveys be conducted to verify and validate the results of this survey, across a broader cross-section of households and geographic areas.

SECTION 3 URBAN PERSPECTIVES ON THE LIVED COST OF COMMUNICATION

Section 3 of the report presents the perspectives and stories told in the open discussion sessions for each of the focus groups.

All focus groups were drawn from low income or very low income households. Participants in the Soweto focus group were invited by the Gauteng Internet Society. The association with the Internet Society partly accounts for the relatively young, tech-orientated character of the Soweto focus group. For all other focus groups, the R2K organisers invited participants from the communities within which they work. This partly accounts for the character of the other focus groups, bringing in perspectives from partially employed or unemployed women, people working in the informal sector and university students.

The focus groups highlight a deep but precarious relationship with mobile communications technology and services. From the narratives collected during the focus group sessions, it became apparent that this relationship may be more precarious in some areas than in others, for example more precarious in Eastridge and parts of Khayelitsha. This diversity in precariousness suggests the need for attention to understanding the lived experience of mobile communications access in much greater depth, with particular attention to smaller income segments than ZAR3,200 or ZAR6,400. For example, as indicated in Section 1 above, many focus group participants lived in households with monthly income of ZAR500 or less.

3.1 Focus Group: Moletsane, Soweto, 22 October 2014

The Soweto focus group took place at a decommissioned school used for church activities and community education. Of the 17 participants, 7 were female, 10 were male. The stories of the experience of life with a cellphone are evocative of an intimacy with technology and through technology. Many stories told in this focus group emphasized the meaningfulness of technology beyond the simplicity of a phone call. One narrative is about the experience of being in many places at the same time and participating in many activities in real time without being there.

> *I call my friends, emails, look for a job, take photos, listen to music, access Internet, I'll never do nothing without my cellphone. Now what I like about my phone – it shortens my trips I can always call that person. And for social responsibilities, Whatsapp can talk to someone who's in China, a friend of mine working for Toyota SA in Korea doing marketing, many people around the world. Social networks make me feel that they are close to me, even if they are out of the country...they tell me about their experiences, we talk every day. If I lost my phone, I would be missing out on life "too much" because I chat with a charger on it.*
>
> *Ja cellphone yo! If it's dead that means my life is stuck 'cos almost everything I do is in my phone, the most thing that catches my attention is the level of personal security you can send an emergency message to somebody and people can find you that's one of the nicest things about a cellphone. It happened to me, I sent a message to my friend in less than an hour they were there to pick me up.*
>
> *My relationship with my phone – it's my life – there's only one me but I can do business in many places with my phone. Most people are not putting much effort to do various*

things, but using the phone for shopping, book a flight. Most of the youth prefer a smartphone because you can use it for almost anything, but sometime using it for things they are not supposed to use it for like pornography. Heard about Oscar Pistorius sentence first on the mobile phone. Facebook, Twitter, News 24, radio streaming, lots of information always coming in. During lazy days, if you are lazy to write you can just record and listen to it and get writing eg reports from a workshop. Most but not all you have to pay for – download the recorder application and get updates.

Very annoying when starting to have a low running Internet, in some cases can't recharge or boost your airtime or bundles because you may not have access, and monetary wise can't buy more airtime. Requires a lot to keep your relationship with your phone, or no Whatsapp, no Google Plus. If you have a meeting somewhere, then you can't be part of the meeting if you are somewhere else, but you can still hear about or be in the meeting.

Simultaneous with the experience of being accessible is the experience of the many forms of value gained through being locally or globally connected. Value is enjoyed when using the phone or the Internet, while knowledge, social and economic value is also transferred to other members of the family or community.

I have made an amendment with my cell phone, I keep it loaded with airtime because sometimes you may miss something. Cellphones are a central part of our lives in case of an emergency, in case of an accident or an incident, you can find yourself being stranded. I send a message, don't write letters, improves the network that people create so I can call them anytime and propose business.

Real examples – 2009 I was in an accident! I was driving alone and I was so weak that I could not move. Started calling my friend, my mom, no ambulance could come cos that's a dark area, isolated, and there are no people there. Video calling – at the IGF in Turkey it (the meeting) was streaming live and we could watch and listen to the live streaming and we could interact with them from Midrand South Africa. Global meeting with nine countries involved in the IGF – we were engaged with them, reply online with chats, feel like you are there in Turkey, interact with them and get an immediate response once you have typed your question. Business – we are spread across Soweto, we create a group and hold meetings in Whatsapp in terms of business objectives.

Most people in the township use the mobile phone for communication, but use the laptop for business. Phone is more for chatting, engaging people, getting information at the right time.

Relationship with the Internet – relationship with the community within the Internet – many different communities and organisations – know about different projects that they're doing in Malawi – why did they implement that particular project for the youth and then a platform to engage with those people and sell services or offerings. Selling home appliances through OLX and Gumtree, I sell Samsung home appliances through my own website and using a mobi app that I downloaded.

I use the Internet on my gogo's phone – search for openings and positions in several companies where I wish to work in the future and the career I wanna advance in. Most of the time I'm a social freak, I love to talk with people. So I clean the house and the yard, I give gogo a service to use her phone.

As a committee member of SANCO I use the Internet to find out about meetings and get information about TV and fridge usage. I repaired my fridge using Google. Most things I want to know are on the Internet like information on subsidized housing or selling online.

Get an education online and graduate from online academies – eg marketing and branding at IQ Academy.

I'm a technician I remember trying to fix a laptop – YouTube video showed me how to fix it.

People are trying to become entrepreneurs – Internet is good for people to learn about a particular industry – I remember when I started selling food I went on the Internet so that I could create my own business that is different from what was already existing. If you have a challenge and you don't know how to deal with it, Internet can help you – from my experience I had a challenge with creating some business recommendations – I went on the Internet and popped in my challenge and someone sent me software. I searched "how to create this document", it gave me options, there was a popup and we interacted live and he sent me a template which you use online, so anyone can see the document online. Another experience that I've had, last week, Africa e-store introduced me to some Portuguese guy and we used Google translate and copy and paste and I engaged with that person via email.

Comments were made on the underutilization and inappropriate use of the Internet, some uses being merely trivial, while others may be high risk.

Most people are familiar with the chat lines and apps rather than the Internet – what the Internet is capable of doing, the information that it carries. Google will give you each and everything but people don't understand yet. Internet is mostly for socializing.

When we are in the home setup where there are couples, cellphones tend to interrupt home life, people don't pay attention to each other … and it's dangerous when driving. There are child safety loopholes as people use the Internet in the wrong way – robbery, rape, banking details, identity theft.

Knowledge of the Internet is lacking from the school and home environment – kids are not being taught about the Internet, but government is giving schools tablets and putting textbooks online – heard about it while doing my research at Molapo Gauteng South West College. Also in Roodepoort have issued tablets to FET college, and then will move to Grade 10 to Grade 12. Students have to hand in the tablets at the end of the year.

Main focus is socializing, then business, then education. I would like education to be first, then business, then socializing. None of the educational events eg promoting e-learning or e-business are coming to Soweto. Soweto Development and Innovation Centre (SDIC) is making people aware of the Internet like finding your way on maps. Teachers don't know how to use the laptops given by department, so what is the good of those laptops?

3.2 Focus group: Eastridge, Mitchells Plain, Cape Flats 24 October 2014

This second focus group took place in the backyard of a local resident with 17 women older than 24 years participating in the exercise. In general, focus group participants experienced the benefits of a mobile phone, including social support through technology. However, the concerns expressed were about the costs of usage in relation to the proportion of spend required against low or no income, rather than in relation to the to value of the mobile phone. None of the participants in this focus group had their own Internet access. While some participants were dependent on family members or other associates for knowledge gained through Internet content, some participants had no access to the Internet, not even through an intermediary. Concerns were expressed about inappropriate use and parental control.

> *Vir my is die phone, save 'it vir jou om plekke toe te gaan, by voorbeeld as die kind siek by die huis is kan one se wat die problem is. Gebeur amper elke keer, as jy nie geld het vir taxi, dan het jy geld vir boodskappe. Met Whatsapp kan jy a conversation hou, as jy nie geld het nie kan chat op die phone. Some phones needs money, some not, to Whatsapp. Die smart phones soos Nokia don't need airtime. Voordeel is – kan alles doen even as jy nie genoeg geld het nie, en emergency notification sonder geld. As die kind in die hospitaal is, of transfer to another hospitaal, then send SMS to please call me.*
>
> *About using OLX to purchase, if you don't like to have debt and have cash for OLX and Gumtree, and gives you a better guarantee than the shop. I purchase over OLX, cheaper and good quality, not paying instalments and HP. Ever since I bought stuff on OLX, I'm still in communication with those people and built a friendship.*
>
> *If you don't know your illness, it's hard. I have been diaganosed with Lupus and I didn't know what it was, I asked someone to google on their smart phone. I used to work and the customer brought me the information about what to eat and about the illness, made me feel better, because I know what to eat, what not to eat, who also has the same illness, not supposed to drink or smoke.*
>
> *If you study a certain subject, you can get information about what you studying and get valuable information for assignments for religious studies. My son and daughter go on the Internet for me.*
>
> *But it's bad because children may use mobile phones inappropriately, should be mainly for work. More care must be taken for children. Negative consequences of social media for example a child in Garden Village went on "ou toilets"[23] – a man asked to meet her in Maitland and she disappeared.*
>
> *My children were practically raised with cellphones but I wanted to know everything and set limits and parental control. Putting photos means children get recognised on Twitter and Faceboook. So we must talk about these things. A couple of years ago, an 18 year old met someone on Mixit and and the child was raped.*

The lived experience of the cost to communicate revealed interesting uses of the lower denominations for airtime vouchers, while at the same time indicating a sense of frustration with the structure of the airtime packages and the lack of substance to the promise of "free airtime". It is perceived that the packages are structured from the perspective of the operator, whose network is offered "free" at off-peak periods, rather than being structured from the perspective of the user who would prefer affordable airtime to be used at their own convenience.

[23] "Ou toilets" is a trashing website where people post slanderous remarks about each other

I always buy R5 but does'nt last a day, or buy megabytes for access to Internet, need to have a plan, 30 MB for R100, 20MB for R30, if you buy R10 airtime you have to use it in 24 hours, you must phone it out to get the R200 and only to MTN, so still controlled usage because you cant use the full amount in the short space of time, I'm from far every Saturday I use my power call and I ask them to gather and we talk, but cant phone far like Joburg, phoning from MP to Upington, Keimoes, Atlantis and Hout Bay, but not Joburg or France, I monitor the usage, limited to certain areas, need to use a world sim-card but must do MTN to MTN, if they send it 10 o clock at night how must I use it up at night, I monitor every minute, every second. Some calls to geographic areas not allowed. Keep the money for Saturday to phone Upington so I can learn a lot about the family. When I get my grant I buy airtime maybe R20, once I phoned New Zealand, but quality was not so good.

Always buying airtime, more than R100 a month, every time R5 or R10, so about R100 a week maybe less, maybe more, or give a missed call, or use the neighbour. R5 and R10 an hour at Internet café – go to the library for free Internet even with R12 for taxi fare still cheaper to go to the library.

SMS is widely used and seen as an effective means of communication.

[I] phoned Eskom, and was using up airtime because the phone was on hold. So I sent an SMS, then within two seconds, got a reference, better than a landline.

Consumer protection emerged as a major topic with participants complaining of numerous scams, including a scam related to social grants. While some scams could be ignored, others lured people into parting with money. Some argued that since RICA, there is no privacy because the mobile number is known and this has led to scams and fraud. Participants said that more protection is needed through the law – more protection, more public information, warnings and other forms of protection.

I got a message from hospital about the hospital bill but I haven't been to hospital!

ABSA left messages demanding a house loan repayment, and payment for cash loans, where did they get my details? Lots of scams.

One particular story that emerged at the end of the focus group discussion pertains to money apparently lost through buying airtime with the SASSA debit card, ie the card issued by the South African Social Security Agency. While this study did not delve into this particular issue, it was reported that the SASSA card is used to buy goods and services including airtime. While the SASSA card can only be used as a debit card, focus group participants claimed that people who bought airtime for a specific amount had a larger amount deducted than the amount paid for airtime. The participants linked these two events, though it is not clear whether the events, namely purchasing airtime and losing a portion of the social grant through "deductions" is linked, and how these events may be linked. It would be appropriate for the R2K campaign to do further investigations into the nature of the problem.

3.3 Focus group: Khayelitsha Community Development Centre, Scott Road, Khayelitsha, Cape Flats, 25 October 2014

A young Khayelitsha participant was proud of his *rhoqo*, this in an era where the importance of mobile devices has elevated the smartphone to the level of electronic muse.

> *Criminals don't want the rhoqo!*
>
> *My story starts with excitement that we going to have Internet, have access to information and be able to communicate with each other. We hear of having a PC at home to communicate, electronic media has been used to communicate with people far away from each other, sometimes you know people who are far away and you are eager to meet them but sometimes you don't know the people who are with you in the room. Internet has been very informative, I like to type in titles of films. I haven't met anyone who is interested in taking up the challenge when it comes to cost, even my brothers think it is a waste of time taking up the challenge. I have used FaceBook, but most of the time I'm at the Internet café or using a laptop at home, not on my phone because I am using rhoqo, I hope on a temporary basis, but at home using a laptop, buying data bundles, but the laptop swallow them so fast so you must know what you are looking for. I was looking for information on media and searching for books about the use of social media by youth in universities and colleges to assess the impact it has on youth in universities and colleges. Using the Internet at home is different from the Internet café because in Cape Town you can pay R5 for an hour at an Internet café, but you can't use R5 of Internet at home.*

The view was expressed that the "free airtime" has no real value, it's a promise of value, but not real value. While operators may offer these packages with certain audiences in mind, other market segments are trying to use them, because they need the low cost of use and are attempting to maximize the value of the spend on communications.

> *The lady has a mobile phone and she has family in the Eastern Cape. Something she enjoys is that she buys airtime for R6 with the promise of getting R60 "free airtime", but the part she does'nt like is that R60 airtime is between 8 and 12 at night, only you must finish it before 12. The time limit is too short, if she's gonna call people, so she did'nt use the R60 "free airtime". When you try to use it, buy R10, then get R70, when it finishes, it all finishes so you don't even know whether your airtime is also gone. It appears that the remaining part of the R6 is also gone by midnight – (airtime is) like Cinderella's pumpkin.*
>
> *My daughter bought two phones, for Vodacom and MTN. At 12pm mobile operator X gives airtime. At that time everybody is sleeping you can't call anyone. Mobile operator X is a xxx, because if you didn't use the airtime between 12 and 5 the airtime is gone when you wake up. "Night shift" – the timing is inconvenient.*

The waste pickers story is one of the more fascinating stories. Waste pickers travel through the suburbs of South Africa collecting selected waste for resale and recycling, including glass, plastic and other materials. Waste picking has transitioned from an individual, informal income seeking activity into a more formal, structured and organized economic activity. It is seen as an emerging economic form, with significant potential for establishment of small and medium-sized business and for generating substantial income in an environment where land-fill use is expensive and environmentally unfriendly and recycling is becoming more attractive. The waste pickers among the focus group participants are part of a group of more than a thousand waste pickers in Cape Town, and communicate with the national organization, the South African

Waste Pickers Association, which is connected with the Global Alliance of Waste Pickers.[24]

> *I have a lot of paperwork that we sometimes have to email or scan if we have to send them to Groundwork and SA Waste Pickers Association in Joburg, and then I obviously cant send it from my 24-hour Internet on my mobile phone. At a library the Internet is either offline or slow, if I go to an Internet café I have to pay R9 per page for up to 6 pages or more, then you have to pay that much, or sometimes the Internet café is closed. Sometimes we make use of offices like Workers World and you have to pay to travel to the office, whereas if I had access at home it would save me money and time. People expect you to answer email within a day or two, whereas you only have access to the Internet once or twice a week. So if your reply was one or two days delayed people think you don't care, most of the time the leadership has to put money together to pay for the expenses.*

3.4 Focus group: Wylie Children's Home, Berea, Durban, 24 October 2014

In many of the focus group discussions, participants expressed a social relationship with the mobile phone. Among the 13 participants in this focus group, many never switch their phone off, while others switch their phone off only when they want to ignore someone or if they 'need a break. Participants expressed that it is very important to stay connected and the majority admit to FOMO (fear of missing out). The mobile phone makes life easier, for

example it was easier to arrange the focus group, because of the cellphone. The phone acts as an important safety device, where people call parents when stranded. Participants use social networking extensively, including Facebook, Twitter, MXit, BBM, weChat, ToGo, Whatsapp, Instagram, PepClub. All use Google – for school related activities, job hunting, games, email. One participant has a blog about digital media.

> *I love my phone (the participant has named his phone), I use it everyday, except when I have no airtime. Whatsapp, Internet, I read news, no games. No airtime is a big problem, I feel stranded.*

> *My parents won't allow me to have a phone.*

> *I love my phone, making and receiving calls, SMSs, games, chat to people around the location, family, friends – my phone would never be off.*

> *Can't "survive" without a phone.*

The relationship with the Internet was considered very important, but finding a job on the Internet was considered very difficult. Facebook and Whatsapp groups are equally important, enabling open discussions about and arranging meetings of the Talent Awareness Project, a community group to which these participants belong. Some participants do research on the Internet, while others listen a lot to the radio.

Comments were also made about negative social behaviors, such as paying for a relationship with airtime, and stealing or "transferring" airtime. Some participants said they would not transfer and would be angry if someone took their airtime. The rest of the group considered "transferring" acceptable behavior.

> *Paying for a relationship with airtime, must make sure you have airtime, but it feels bad.*

[24] globalrec.org/tag/south-african-waste-pickers-association/

Transferring airtime using a USSD code is common, not considered stealing even if the other person is unaware that airtime has been transferred from their phone, often done to family members, small amounts involved between R2 and R5, so not considered stealing.

Other examples of negative behaviors included the story of the Maths teacher who BBMs during class. The teacher gives the class a worksheet, doesn't explain the content, and then BBMs the business studies teacher who owns a business, then sits and runs the business from the classroom. Participants said they prefer face-to-face relationships and many do not approve of gossip taking place in group chats.

Most of the time people always on their cellphones. It takes too much of your time. Can't even have a decent conversation because they busy on the phone. How can you have a conversation when someone says LoL?

People are using phones in church; a pastor is using his cellphone during a service.

3.5 University of Kwazulu Natal, Glenwood, Durban, 25 October 2014

Of the 16 participants, only three were not on Facebook, while only two were on Twitter. Facebook is used to access for latest news, and to make lots of new friends. For some, the mobile phone is a status symbol, and the local slang for old phones is OOVA (derogatory term).

I just can't live without my phone, always on, stress if I don't have it, cant sleep if phone not next to me, panic if can't find phone.

Makes my life easier…all ways, applying at university received SMS notification of acceptance, whenever I need money from parents, don't have public phones, need to call ambulance, police, searching for jobs, news.

…have friends in Mozambique, feel like you there…

Use for work purposes, emails, phone calls, taking photos, Facebook, Whatsapp…it's a fashion

Transferring airtime is acceptable from granny even though she doesn't know (R2). Transferring airtime is not right but we still do it.

Google is important for fashion, jobs, Gumtree and OLX very popular…

On the other hand, social networks are seen as a time killer to use only when bored. Participants discussed loading R29 onto the phone, but having no money to make a call as if some background app is reducing the airtime bought. This was experienced as very frustrating, leaving users feeling violated, and denied the right to communicate.

3.6 Understanding key issues pertaining to the lived cost of communications

The mobile phone is experienced as a necessity for everyday life, with some risks, which can be managed. Cost is clearly an important issue because it emerges from the focus groups that participants, all from low-income communities, have limited disposable finances to buy the communications services made possible by purchasing airtime.

What is the lived experience of the cost of mobile communications for low and very low-income households? While this study did not examine the lived cost for particular income segments, the interactive focus group discussions gave a keen sense of the lived cost in household income categories (i) ZAR2,001 – ZAR5,000 per month; (ii) ZAR501 – ZAR2,000 per month and (iii) ZAR500 or less per month. In these household income categories, the potential loss of economic opportunities experienced by the inability to communicate can have strong negative effects on households, including failure to access food and income opportunities with economic efficiency. Amounts of R6 and R10 are significant sums of money in these income categories, as they make the difference between being able to communicate and not being able to communicate.

The overwhelming majority of focus group participants speak in the language of airtime and minutes, not of data bundles or Gigabytes, indicating that the transition from buying a commodity to buying a service or buying value has not yet taken place. Mobile Internet is recent, and mobile apps are largely uncharted territory. Participants advised that while they can buy airtime for R6, they cant buy a data bundle for R6, expressing an awareness of missing out on the information society, an awareness of finding oneself marginalized by the extension of inequality in the mobile call and the mobile date communications market. This digital inequality links to the larger structures of inequality in the economy and society.

Data communications packages offered in 2014 included a price of R38 for a 250MB bundle or 15c per MB and R19 for a 1GB data bundle valid for 24 hours.[25] The latter firm Brightwave, a South African-Chinese venture, has installed antennas around Soweto and is advertising WiFi access for R19 for 1Gig for 24 hours, and R49 for 5 Gigs. The University of Johannesburg Soweto campus is reported to have BrightWave WiFi access. However, it is not clear how the consumer would use Facebook for up to 51 hours or browse for up to 102 hours if the 1GB data bundle is valid for only 24 hours. This presents a low-cost access option for many Soweto households, but the business model is new and the longer term effects and benefits are not yet clear.

Without commenting on the cost to provide data services, it is noted that consumers in the low to very low-income households, would have difficulty in regularly affording data services and would pay R19 – R38 or more for a limited service, whether in the volume of data consumed or in data-time consumed.

"Free airtime" is experienced as a hook pulling consumers into unbudgeted consumption, which can escalate relatively quickly. Even where mobile messaging may be a more economically efficient form of accessing family and economic opportunities than transport, free airtime is met with increasing frustration and cannot be assumed to be affordable. The lack of transparency in the real cost of a call and the real cost of a data bundle requires attention from advocacy groups, from the regulator and from mobile operators. Low income consumers want to know, be able to calculate and budget for the real cost of communication. Most firms publish prices on the website and Telkom publishes a full tariff list on its website. However, few consumers of mobile communications will have access to this online information.

[25] www.telkommobile.co.za/plans/prepaid-data/ and www.brightwave.co.za/our-products

SECTION 4 PERCEIVED SOCIO-ECONOMIC IMPACT OF THE COST TO COMMUNICATE

Section 4 of the report sets out the response to the structured questions presented at the focus group sessions.

4.1 Importance of a mobile phone in the household and the community

The mobile phone is deemed important for so many reasons, including easy information, easy contact, and other social and economic reasons.

In terms of social importance, community activists can easily communicate with others in different provinces. Mobile and Internet communication makes the community "even more connected" than before, for example more than a thousand people communicating about an event taking place in Soweto, such as distributing the poser for Summersplash. Using Cell C group chat and other group communications, people are connected on this network of phones. Those participating in groups believe it's important to meet the people in the group at some stage, as a friend is someone you know not just someone that you meet on social media. "If I don't know the person, they are not yet my friend".

Very important
Staying in touch
Day to day living
Asking parents what to cook

Social communication makes the household easier to run in ways that are very important in communities with limited income to spare. For example, it is really important that if the household is short of bread they can ask someone to bring it from town, as there is no money for a trip to buy bread. Specific forms of economic importance include reliance on the mobile phone for receiving a response to job and other work-related transactions. University students find mobile phones to be useful at a household level for cellphone banking, transferring money and for paying bills (only 1), but experience trust issues because they are unfamiliar with these services. They also find mobile phones to be useful at a community level to distribute information, making community meeting announcements is very common, as well as for crime prevention (dial 10111). Organisations dealing with crime prevention use cellphones extensively to send information. While these "every day uses" may appear very basic, they are vital and directly translatable into cash and time savings, as well as safety benefits for low income households.

4.2 Main purpose of using the phone

In Soweto and Durban, the main purpose was making calls, receiving calls and SMS. In Eastridge, the most important purpose was interpreted as "everyday emergencies" such as school, hospital or Eskom notifications and participants were unlikely to use the phone unless it became really necessary. In Khayelitsha, mobile phone calls were important to contact the approximately 100 waste pickers in the area, though (using the promotional rates) "they always complain because of phoning after 7". Another purpose is safety "you don't have to travel to places that are unsafe". Airtime and socializing are also strongly connected, to identify where to find friends and social events. Thus the lived experience of mobile phone usage in communities with low household income is evidence of the power of electronic communications at the most basic level, leaving significant room for moving up the value chain of mobile and Internet usage and drawing greater benefit from the potential social and economic power of communications. University students stated that calls are still the primary form of communication, because SMS was considered less reliable as it could be ignored. The "power user" gap is a particular form of the digital divide that is strongly felt in the lived experience of the focus group participants.

4.3 Views on the price of calls, cost of airtime and data bundles

Perceptions of the price of calls and the actual cost of communications were relatively consistent across the five focus groups. Given the socio-economic status of the five communities in which focus groups were conducted, the price of a call, the cost of airtime and data bundles were seen as expensive. A smartphone is expensive, both because the device is expensive and because consumers can't recharge a smartphone for R10 or 3MB, they need a high volume of airtime on a smartphone, which is beyond what most households can afford. Two strong lines of thought emerged (i) many people are not buying smartphones due to price and (ii) those who can only just afford a smartphone are buying the phone on credit in order to access better communications, but will need to advance their usage of the smartphone in order to receive real value and benefit. Only a few participants were aware of the advantage of sending emails "for the whole month with BIS for R60".

Participants said that many people make real sacrifices, for example some people would prefer to buy airtime than to buy bread, or share money. They feel they must "lose something" (i) because communication is necessary and (ii) there is no easy alternative way to communicate. One participant said they depend on someone else to have money for airtime because they are unemployed. The participants in the Mitchell's Plain focus group estimated that on average they spend about R10 a day, possibly up to R300 a month on airtime. They believed it would be beneficial to have very low prices for calls (for example 1c per minute) in a small geographic radius, thus reducing the cost to communicate. They say that the high prices during office hours make communication difficult because this is the time of day when they need to communicate. The suggestion was made that price packages should be set at a level that enables communities to be connected, through low priced Internet, because connecting through Facebook requires more data bundles than can be used for R12, a typical daily amount available for Internet access.

Consumers are creatively using a range of packages to maximize the benefits, noting that consumers have to buy multiple sim-cards to get the benefits of different packages. There is a strong attraction to receiving free data bundles when buying airtime, even though this is perceived as buying the loyalty of the consumer. "I need both of these things and this network is giving me both so I have to be loyal". Some retail brands offer free airtime to sell their products, eg packet soup and potato crisps brands and lower-income users avidly collect and aggregate the airtime vouchers.

With multiple sim-cards and airtime vouchers, consumers construct a utilization portfolio, using Vodacom to Vodacom (eg 60 minutes for R2), and MTN to MTN, then Cell C for data bundles for social media. Having multiple sim-cards enables the consumer to communicate with many more people than having a single sim. The variety of price plans (eg Zone) influences communication choices, so for example MTN users use their phones at night, to get free data when spending R6. Participants were very aware of the various price plans. There is a sense that mobile operators are making it easier and cheaper to access mobile communications, but not without the financial risk of losing the micro-investment of R6 or R10 or R20 paid for airtime plus free minutes or free data bundles. Participants also stressed that the effect of free airtime is to get people to constantly buy airtime every day, because airtime is attractive but constantly depleted.

One participant was very interested in the idea that Vodacom may be launching the rich education cloud for free data bundles for e-learning, where a user name can be created for access to content in the cloud via a mobile device, for example previous year's maths papers for matric level study.

A key area of discussion was the constant promotion of new smartphones. The complaint was that smartphones are constantly being promoted to replace the previous series, but consumers are not guided with respect to the benefits of the applications. For example, the Nokia S60 is strongly marketed, but consumers are not sure which S60 platform has been suspended and this negatively influences buying behavior as decisions are made with limited knowledge. Consumers buy smartphones in response to advertising, but are not clear on the value they are getting. When they buy a smartphone, it requires additional funds to pay for the apps, which many cannot afford, thus owning the smartphone becomes pointless. Furthermore, consumers are opening accounts at retail stores unnecessarily in order to get the smartphone at what is perceived to be a lower cost. There is continuous pressure to upgrade to the next model of smartphone, which consumers respond to because of the perceived threat that a particular platform of the previous version of the phone will be cut off. Thus, advertising pushers consumers to keep buying and upgrading, while the benefits are constrained by income.

In Durban, both the community focus group and the UKZN student focus group said that phones and airtime were "very expensive", but having a specific type of phone is important because they have become a status symbol: "I wish I had an iPhone". One of out thirteen would buy airtime over hanging out with friends, while 14 out of the 29 in the Durban focus groups would buy airtime rather than food even if they were hungry. More participants in the university focus group had smartphones than those in the community group.

Analysing the focus group discussion indicates a real sense of exhaustion of the participants, with trying to figure out the value gained from so many price packages, from the often complex and convoluted way in which actual cost is unclear in the various specials and deals available.

4.4 Quality of service and customer support

Quality of service is perceived as poorer than expected. An example was made of a Sowetan's personal experience of making a call or using the Internet in Dubai. "When you make a call the other side is ringing immediately, however in SA you have to wait, there is a lag time. Sometimes Internet is slow compared to Dubai experience. Call that person and ask 'have you received my email', 'no still waiting'". "It seems we don't have the best technology for fast connections. If you try to make a call on 31 December, there is poor service because the network is overloaded". "Crossed lines remain".

Eastridge participants said that some operators have good signal and there is good service, but they encounter service problems with other operators. In this case, the cheaper cost of the call to the consumer has no value. Participants from the UKZN focus group held the view that quality of service "comes and goes" and that operators are ignoring the rural areas that they come from. Quality of service appears to be suffering because the free airtime specials and restricted times of the day when these special deals are available overloads the network. The value gained from airtime is negatively affected by the poor network quality. For example, in a case where a participant bought airtime, which ran out even though she could not use it effectively due to poor network quality. It was also argued that free airtime deals should be structured to enable the consumer to call any number, because he/she may not have enough people to call on the same network.

With respect to trust and customer support, there is a strong impression that there are many scams perpetrated on mobile networks and that operators pass on numbers without the knowledge of the consumer. Participants from Eastridge said that, after RICA, there was more cold calling about loans. Participants also felt that operators were not helpful, for example when a phone is lost and they want to do a sim-swop, the call centre asks questions about how much airtime was on the phone, the last three numbers called and other information. This leads to frustration and some participants have lost both their phone and their number.

While there is no clear indication of which networks offer better quality of service, the Cape Town workshops suggested that MTN had better quality of service. However, brand loyalty irrespective of quality of service was claimed to be very strong across all focus groups. It should be noted that many participants had sim-cards for two or three mobile operators.

4.5 Packages, bundles and specials

Linking to the earlier discussion on the price of calls, participants reflected on the many types of packages and special deals, including operator to operator packages, low usage packages, recharge packages that come with free airtime, specials where the calling part can talk for free or at a discounted rate, and low cost calling plans for Internet access.

Power bundles were popular amongst the Soweto focus group, being where a consumer buys R5 worth of airtime, then dials a number to get free airtime. However, participants did not believe they were getting the full value of the R5 and the free airtime, because it needed to be used within a very short space of time. Some participants use normal pre-paid airtime, many participants use packages and bundles, but these bundles change and they have to keep track of the changes and whether they are value for money. “There’s enough options and enough packages but never enough money”. “When it’s up, then it’s up”. “Please call me’s 6 or 10 a day, you no longer get 25 free SMS’s a day. Only 4 out of 17 participants have Whatsapp.

A regular refrain about the problems with special deals, raised several times, in a few of the focus groups was that the called party complains of the time of day of the call: “When I call my family in the Eastern Cape or call my friend they say why do you call me at 12 o’clock I’m asleep”.

Budgeting is crucial when planning for airtime: an amount of money is set aside food, electricity, transport, because of the obligation to buy airtime in order to communicate. Eastridge participants said they constantly diverted money for airtime from money earmarked for food. It is not possible to divert money from that set aside for rent, but they constantly economise and buy specials looking for money for airtime. “Every time I buy specials, I see the savings as going to airtime. With some grocery specials you get airtime, even R1. Airtime is used for advertising, for example if you buy chips at Shoprite, you get R2 airtime. Sometimes you think the other way round, but it’s mainly food versus airtime. Airtime is the most important because of what I have to do with airtime”. Some participants said that they accumulate small amounts of airtime and add the difference in cash in order to make calls.

Many participants believed that package deals did not offer the anticipated value. They felt that they "lost a lot of airtime when I bought a new phone. I phoned Operator X and they said I had subscribed but I hadn't subscribed to anything, when you OPT OUT R7 gets taken off, even if you have no airtime, when you put airtime then the R20 just goes".

> *With discounts you are not sure whether you are really getting a discount, and R5 airtime is going eg R2.80 per minute during the day. And the voice announcing the end of airtime and tells you to buy more even while you are still talking. We all know how much airtime we have and our calls are being interrupted. If you have no airtime she does'nt call you. She's using up our airtime and I get frustrated 'cos you just loaded this small amount of airtime eg R3 remaining but she says one minute remaining while we all know that a minute is 90c.*

A participant in Khayelitsha argued that the benefit is to the operators not the consumers. "I think we don't get any benefit – for example you get the free airtime after buying airtime but don't use it all so where's the benefit? So we spend more for less. You spend more for less, because you're obligated to use up your own airtime first. Another complaint focused on SMS-based competitions: How many of you did buy airtime for SMS and then they give R8-million to one person? In yet another case, the free airtime was clearly valuable: If I buy the R20 airtime those waste pickers are in trouble because I call all of them about the meeting, remind them in advance, so it is a benefit.

4.6 Other ways of leveraging benefit and getting Internet access

Some participants said they used a friend's phone such as a Samsung S4 as a WiFi access point. There appears to be limited or no free WiFi access in urban townships such as Soweto, with retail outlets in shopping malls offering password only WiFi access, which is experienced as being no access. In a particular case, the participant had approached an employee in a particular retail outlet to enquire about the password and was told that the employee did not know the password. This borders on false advertising and would be a matter for the consumer council to consider. The report of this experience also draws attention to the fact that we may underestimate the importance of complementary forms of data access, such as the role of the retail sector (coffee shops, retail stores, etc) in providing free, cheap or affordable Internet access, though clearly this cannot be relied on as a standard form of access to Internet-based economic and social transactions.

4.7 Impact of cellphone costs on communities

The attractiveness and potential usefulness of cellphones is taking away money, which could be budgeted for education, rather than using cellphones ineffectively. "For example, in a family of six, with only one person working, this person buys a phone for R2000, but the siblings don't have school shoes". There is a culture of buying new smartphones on hire-purchase accounts, as well as a market of illicit trade in reselling stolen smartphones.

Some participants felt that the focus on short-term goals with respect to smartphone ownership was an opportunity cost for education. Participants argued that it is necessary to shift towards greater educational use of cellphones and the Internet. "People have to understand the need and benefit from the technology rather than being fashionable. Even though they are too expensive to use or to buy, we need them because it connects us to opportunities and experiences". However, there is limited knowledge of the value and potential of smartphones and computers, eg Touchpad 5, thus it is now necessary to focus on maximizing use. It was argued that few Sowetans could afford smartphones, but they were buying smartphones due to peer pressure. This should be seen as an opportunity to focus attention on maximizing the value of the technology. "We need awareness campaigns on how to communicate, for example [dealing with] the stigma of HIV-AIDS and understanding the value of communications usage [in this regard].

4.8 Socio-economic impact

In the discussion on the socio-economic impact of mobile calls and mobile phone usage, a few examples emerged. An Eastridge participant told the story that she cannot afford to travel to her familial home in Upington on a regular basis at the cost of R1000 per trip. Since she can only travel to Upington once a year, she uses airtime to socialize with remote family, to find out who died, who had babies, who married, who graduated, engage in local gossip, and get family updates, through holding a long distance family conference by mobile call on Saturdays. She regards Facebook as too personal, too public, mostly for younger people. Thus, in theory, regular weekend family calls provide a significant, lower cost, social benefit for a family group who cannot afford to see each other on a regular basis.

Other small benefits were mentioned, for example sending an SMS to "buy me bread", wedding invitations by SMS, all saves money. Since Please Call Me is limited to 10 per day, often participants can't communicate, particularly when the person on the other side doesn't have airtime. Here, sending "Please Call Me" (also called buzzing) is used to establish that the person is still ok. Missed calls are still used as a strategy to indicate that the calling party wants to communicate.

When asked what they wanted in the future, some participants suggested (i) more airtime for people who get grants (ii) give consumers more airtime or data bundles for the same amount of money and (iii) make airtime available for less than R1 a minute in poor communities.

A participant said: "I think the whole picture is incomplete because you have to say abc because there is not enough time to communicate so there is a lot left unsaid. Most of us do not calculate how much we spend a month, spending R5 or R10 or R25 and we don't calculate.

Use of the Internet has limited socio-economic impact because the Internet user is more aware and knowledgeable and can share information obtained with others: "It has that impact but its got a downfall because its costly and you don't stay on the Internet as much as you would love to, you have to cut your time very short than when you were in an Internet café". "You get to learn new things, if you want to meet another company eg for waste pickers you can go on the Internet and learn about it. That becomes a barrier of some sort (for those who are not on the Internet). With social networks you can do a lot – people in Gauteng know about the struggles in Cape Town". "With my rhoqo phone which does'nt have social media I have to borrow his phone so I'm always going to ask for someone else's phone. If I need to call my grandfather in the Eastern Cape I have to borrow the phone so my dignity is going nowhere".

4.9 Summing up the focus group discussions

Possibly the best way of summing up the focus group interactions is the sense of frustrated digital citizens, people who have strong needs and interests in using advanced digital communications services, but for whom very few services or packages are either suitable in terms of their communications needs or affordable in terms of their individual and household incomes.

A notable area of silence with respect to communications and Internet access was the absence of experience of community and public access to the Internet, as only a few participants referred to access at a community library and none of the participants referred to Internet access at a public access centre.

SECTION 5 KEY POLICY AND ADVOCACY POINTS

The Right2Know Campaign commissioned the LINK Centre to undertake this research project on the 'lived cost of communications' to establish how people experience the cost of communications, the trade-offs they make in their lives to afford communications and the impact on their ability to afford the cost of living generally. Right2Know has worked extensively with activist communities to advocate for more affordable access to communications technologies. In recent years, the debate on affordability of telecommunications has often centered on dropping the cost per minute of a phone call, sending an SMS, or accessing data networks. Telecommunications companies are lauding their efforts to lower these costs, however, the Campaign still hears stories about the working class poor struggling to afford basic airtime, let alone access to next generation networks and the Internet.

Pricing studies[26] that explore the issue of affordability, while extensive in their economic analysis, are limited in the ways in which they understand the actual experiences of individuals struggling to afford access to communication technologies on a day-to-day basis. Right2Know, therefore, wished to commission a research project that gave the problem a human face by putting the focus on the real cost to real people. The Campaign aimed to do this by capturing the experiences of users with regards to the affordability of cellphone usage, to establish just how affordable these services actually are, and how cost impacts on the ability of users to maximize the potential of cellphones and information and communication technologies.

5.1 Understanding the "lived cost" of a call

Individuals and households pay between R120 per month for 40 calls and R300 per month for an unknown quantum of calls and SMS. This is relatively high cost against a household income of R3500 per month, the top end of the household income for the majority of focus group participants. At approximately 3 - 6% of household income, there is limited financial opportunity to move to the next level of electronic communications usage, demonstrated by the comments about the limitations of owning a smartphone, while not having the money to effectively utilize its greater technology and service capacity. By virtue of the experiences shared in the focus groups, it can be deduced that the experience of the call is limited to the most basic conversation with a focus on the efficient use of the limited airtime available.

5.2 Understanding the "lived cost" of Internet and mobile Internet

Households with the demographic profile and income levels reported above will not move easily into the digital Internet age. The experience of the limited Internet usage that can be bought with a few rand is so meager as not to constitute a realistic Internet experience that leads to socio-economic impact. Yet, the mobile phone is the device that is already in the hands of most households. The cost of almost any other device constitutes a barrier to Internet use for low-income communities, living on a monthly household income of ZAR6,400 or less. Furthermore, the high cost of mobile Internet relative to monthly household income limits the value of the mobile phone as a piece of technology that can bridge the digital divide.

[26] Research ICT Africa: www.researchictafrica.net/prices/Fair_Mobile_PrePaid.php

5.3 Known effects of the reduction in mobile termination rates

While mobile termination rate (MTR) reductions have brought down prices, it appears that the MTR reductions has had only a marginal impact on the increased ability to communicate at the low and very low household income levels. This may be early to say for the latest MTR reductions, but is apparent with respect to the reductions for the past 3 years – in other words, despite the three-year glide path decided by the regulator, ICASA, affordability is low given low household income levels.

5.4 Consumer rights and consumer protection

Consumer rights are an important aspect of access to electronic communications. As mobile communications becomes available to many households, more people are affected by the risks associated with scams set up in the mobile environment. Regulators have an important role to play in reducing the risks associated with scams and should conduct regular surveys and monitoring to stay abreast of the issues and intervene as and when appropriate. For a detailed discussion of the role of regulators and approaches that have been used on the African continent to protecting consumer rights in the electronic communications sector, see the publications Consumer Best Practices in the Telecoms Sector[27] and Empowering Regulators to Protect Consumer Rights in the ICT sector.[28] The first publication advises that consumer empowerment and consumer protection from unfair practices should be high on the agenda of the regulator. A key question posed in the discussion on consumer best practices, as presented in this report is:

> *What do consumers feel about the services they receive and what are service providers doing to address any concerns they might have?*

This brief investigation has sought insight into the first part of the question, namely what consumers feel about the services they receive, as an important element of understanding "lived cost". This exploratory work did not survey or monitor the consumer concerns in any depth, as it was intended to highlight concerns rather than to gather extensive data on these concerns. The findings of this report indicate that it may be appropriate for R2K to (i) regularly survey the concerns of consumers about the services they receive and (ii) meet with the sector regulator ICASA to better understand the current state of consumer protection in the mobile and Internet communications environment.

5.4.1 The reality of "free airtime"

Free airtime isn't free. Consumers buy free airtime and experience limited usage and limited value. They perceive the "free" airtime as lost and sometimes the "bought" airtime as well. "Free" airtime is a driver of consumer behavior, pushing continual topping up, which effectively constitutes experiencing access at the margins of the communications market. From this brief work and analysis of the data, the need is clear for mobile operators, mobile service providers, consumers, the regulator and advocacy groups to better understand the "real cost" of mobile communications to low income and very low-income consumers and households. "Free airtime" is a ruse as the participants do not experience this as a free service.

---

[27] Gross, I., Lewis, C., & Southwood, R. (2012). Consumer best practices in the telecoms sector. Johannesburg: LINK Centre, University of the Witwatersrand. Available at www.wits.ac.za/files/...pdf

[28] Lewis, C. & Southwoord, R. (2012). Empowering regulators to protect consumer rights in the ICT sector. Johannesburg: LINK Centre, University of the Witwatersrand. Available at www.wits.ac.za/files/...pdf

5.4.2 Scams that present risk in the mobile communications environment

Consumers experience various types of scams, which were poorly explained during these particular focus group sessions, but which nevertheless tend to pre-occupy and raise concerns among consumers. R2K is therefore advised to consider conducting further research with a special focus on scams being conducted in the mobile communications sector and the extent to which consumers are at risk, as well as particular forms of consumer protection that the electronic communications sector regulator or the consumer council should be called upon to exercise.

5.4.3 Future advocacy on consumer rights and consumer protection

Based on the above discussion in section 5.4 in particular, R2K is advised to delve into the detail of consumer rights and consumer protection issues as a significant component of its price campaigns.

5.5 Being part of a digital future: issues for policy and regulation

The investigation into the lived experience of mobile communications, including voice, messaging and Internet, is an important one because it enables consumers of communications, advocacy groups such as R2K, policy-makers and regulators to reflect on the following things: (i) the effects of existing policy (ii) the outcomes due to specific changes in policy.

If South Africa is to transition effectively towards experiencing digital futures in health, education and work; to transition towards living in “smart cities”; to see e-transformation influence social and economic development; then the participation of citizens in low and very low-income households in such digital futures and transformed social and economic environments should be constantly monitored and understood. The lived experience shows the reality beyond the objectives of policy.

Despite the high cost of mobile communications relative to individual and household income, the majority of participants access mobile communications through pre-paid airtime or data bundles, not through community access or public access centres.

APPENDIX A FOCUS GROUP SEMI-STRUCTURED QUESTIONS FOR OPEN DISCUSSION

(1) How important is the mobile phone to your household / to your community?

(2) What is the main purpose for which the mobile phone is used?

(3) What are the perceptions around price of calls and actual costs of communications?

(4) What are the perceptions around the Quality of Service?

(5) What techniques are employed to exploit different packages from operators e.g. multiple SIMS, power hour, other?

(6) What are the other ways of leveraging benefit from operators?

(7) To what extent is money diverted from other household expenses to communication?

(8) What is your experience of the socio-economic impact of the cost to communicate?

APPENDIX B SURVEY*

* This survey format has been revised from a previous survey design prepared for the Gauteng Provincial Government in 2009-2010

SURVEY

The Lived Costs of Communication in South Africa

R2K & LINK Centre Joint Research Project

The Right2Know Campaign and the LINK Centre at the University of the Witwatersrand have partnered to undertake a study on the lived cost of communications in South Africa. The study explores how people experience the cost of communications, the trade-offs they make to afford communications and the impact on their ability to afford the cost of living generally. The study will also explore whether South Africans feel they are getting 'value for money' in terms of the quality of the service. The study takes place in Johannesburg, Cape Town and Durban.

Session Leaders

Luci Abrahams, LINK Centre

Kiru Pillay, LINK Centre

A: Household Profile and Access

Household Composition

HM	Name (only first name)	Gender 1: Male 2: Female	Year of Birth				Population Group				Educational Level (completed on 31/12/09)			Employment		
							A	C	I	W						
01																
02																
...																

[Please circle the name of Household Member in the HM column who is being interviewed]

Codes		
Population Group	**Educational Level**	**Employment**
A = African/ Black	0 = Did not complete any	1 = Student
C = Coloured	1 = Nursery school	2 = Employee
I = Indian/ Asian	2 = Primary school	3 = Self employed
W = White	3 = Lower secondary (G8-10)	4 = Family worker
	4 = Upper secondary (G11-12)	5 = Child not yet at school
	5 = Tertiary (non-university)	6 = Unemployed
	6 = University	7 = Retired/ Pensioner
	7 = Post- Graduate Degree	8 = Disabled

Household Income (net monthly income)			
Less than R500		R10 001 – R20 000	
R501 – R2 000		R20 001 – R30 000	
R2 001 – R5 000		R30 001 – R50 000	
R5 001 – R10 000		More than R50 000	
Don't know		Refuse to answer	

Mobile phone

1. **Does anyone in the household own a mobile phone?**

☐ Yes ***(continue to next question)*** ☐ No

2. **How many of you living in the house own mobile phones?**

☐

3. **When did this household first acquire a mobile phone?**

a) More than three years ago ☐
b) Three years ago ☐
c) Two years ago ☐
d) Within the last 12 months ☐

4. **How many phones in your household are smart phones?**

☐

Internet Access

5. **Does this household have access to the Internet at home?**

☐ Yes ☐ No *(if No, go to Q8)*

6. **What type of Internet connection is this (more than one answer possible)?**

a) Modem dialup ☐
b) ISDN dialup ☐
c) ADSL ☐
d) Leased line ☐
e) Wireless ☐
f) Broadband ☐
g) Don't know ☐

7. **On which of these devices is the Internet accessed at home (more than one answer possible)?**

a) Desktop computer ☐
b) Laptop computer ☐
c) Handheld computer ☐
d) Mobile phone ☐
e) Other (specify):__________________ ☐

8. **What are the reasons for not having access to the Internet at home (more than one answer possible)? *Only answer this question if No in Q5***

a) Have access to the Internet elsewhere ☐
b) Don't want Internet (because the content is harmful) ☐
c) Don't need Internet (because not useful, not interested, etc) ☐
d) Equipment cost to high ☐
e) Access cost too high (telephone, etc.) ☐
f) Lack of skills ☐
g) Physical disability ☐
h) Privacy and security concerns ☐
i) Other (Specify):______________________________________ ☐

B: Individual Profile, ICT Access and Use

Mobile Phone Access and Usage

9. Which of the following statements best describe you?

a)	I have an active SIM card and own a mobile phone		*(go to the next question)*
b)	I have an active SIM card, and although I don't own my own mobile phone I have access to one		*(go to the next question)*
c)	I neither have an active SIM card nor a mobile phone		*(go to Q17)*

10. How many ACTIVE mobile phone numbers (SIM cards) do you have?

11. Is (are) your active mobile phone number(s) prepaid or postpaid (contract) phone(s)?

a)	Prepaid	
b)	Postpaid (contract)	
c)	Both (have multiple)	

12. What do you use your mobile phone for?

Yes	No		Yes	No	
		Making phone calls			Sending emails
		Receiving phone calls			Receiving emails
		Sending SMS			Using as a diary
		Receiving SMS			Keeping time
		Taking photos			Conducting my banking
		Taking video clips			Playing games
		Sending MMS			Sending faxes
		Receiving MMS			Downloading music
		Listening to music			Social networking (Facebook, etc)
		Sending BEEPs, FLASHs, BUZZ, MISSED CALLS or PLEASE CALL ME			
		Receiving BEEPs, FLASHs, BUZZ, MISSED CALLS or PLEASE CALL ME			
		Used to generate income			

13. Tick the 3 most frequent uses of your mobile phone

Tick		Tick	
	Making phone calls		Sending emails
	Receiving phone calls		Receiving emails
	Sending SMS		Using as a diary
	Receiving SMS		Keeping time
	Taking photos		Conducting my banking
	Taking video clips		Playing games
	Sending MMS		Sending faxes
	Receiving MMS		Downloading music
	Listening to music		Social networking (Facebook, etc)
	Sending BEEPs, FLASHs, BUZZ, MISSED CALLS or PLEASE CALL ME		
	Receiving BEEPs, FLASHs, BUZZ, MISSED CALLS or PLEASE CALL ME		
	Used to generate income		

14. How did you get your current (latest) mobile phone?

a)	Got a new mobile phone when I signed a contract	
b)	Bought a second-hand phone	
c)	Got a new phone from family or friends	
d)	Got a second-hand phone from family or friends	
e)	Bought new phone at shop	
f)	Other (Specify):________________________	

15. What is the name of your current provider(s) (more than one answer possible)?

a)	Cell C	
b)	MTN	
c)	Virgin Mobile	
d)	Vodacom	

16. I'm going to read out some statements. Please tell me if you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree.	**Strongly Agree**	**Agree**	**Neither Agree nor Disagree**	**Disagree**	**Strongly Disagree**
a) Using a mobile phone makes my life easier					
b) Using a mobile phone saves me travelling time and costs					
c) Using a mobile phone helps me to stay informed about the latest news					
d) Using a mobile phone helps me to socialise					
e) Using a mobile phone helps me to find jobs					
f) Using a mobile phone provides me with a sense of security in the case of emergency					
g) Using a mobile phone helps me to run my business					
h) Using a mobile phone is fashionable					

17. Why don't you have your own active SIM card? ***(Only answer this question if you answered Q9.c)***.

a)	Cost of buying a SIM card	
b)	Cost of calls	
c)	No access to a handset in which to use the SIM card	
d)	No mobile coverage where I live	
e)	I don't have anyone to call	
f)	I use a fixed-line phone	
g)	I use a community public phone	
h)	Other	

18. Do you plan to get a mobile phone for your own use for the future?

	Yes ***(go to the next question)***		No

19. When do you expect to make this purchase?

a) Within the next three months ☐
b) Within the next six months ☐
c) Within the next 12 months ☐
d) Within the next two years ☐

Internet Access and Usage on a Mobile Device

20. Have you ever used the Internet from your mobile phone?

☐ Yes ***(go to the next question)*** ☐ No *(if No, go to Q25)*

21. When did you last use the Internet on your mobile phone?

a) Within the last six months ☐
b) Between six months and a year ago ☐
c) More than a year ago ☐

22. On average, how often have you used the Internet in the last six months?

a) Every day or almost every day ☐
b) At least once a week (but not every day) ☐
c) At least once a month (but not every week) ☐
d) Less than once a month ☐

23. Would you say that compared to six months ago, the time you spent on the Internet has

a) Stayed the same ☐
b) Decreased ☐
c) Increased ☐

24. For which of the following activities did you use the Internet in the last six months?

	Yes	No
Communication, Information search and on-line services		
a) Sending and receiving emails		
b) Finding information about goods and services		
c) Using services related to travel and accommodation		
d) Downloading software (other than games software)		
e) Reading or downloading online news/ newspapers/ news magazines		
f) Looking for a job or sending a job application		
g) Seeking health-related information		
Banking, selling of goods or services		
h) Internet Banking		
i) Selling of goods or services		
j) Buying goods or services		
k) Paying online using credit cards		
Training and education		
l) Looking for information about education, training or course offers		
m) Doing an online course (in any subject)		
n) Consulting the Internet with the purpose of learning		

25. **Where, apart from your mobile phone, have you used the Internet in the last six months (using a computer or any other means)**

a) At home	
b) At place of work (other than home)	
c) At place of education	
d) At another person's home	
e) At other places:	
i. Public library	
ii. Post office	
iii. Community centre	
iv. Internet Café	
v. Government office	

Advanced Internet Access and Usage on a Mobile Device

26. **For which of the following advanced services did you use the Internet in the last six months for the following communication activities?**

	Yes	No
a) Telephoning over the Internet		
b) Video calling (via webcam) over the Internet		
c) Using services related to travel and accommodation		
d) Posting messages to chat sites, newsgroups or online discussion fora		
e) Using instant messaging		
f) Reading weblogs or blogs		
g) Creating and maintaining own weblog or blog		
h) None of the above		

27. **Did you download a mobile app in the last six months?**

☐ Yes ***(go to the next question)*** ☐ No

28. **Which mobile apps do you use?**

____

____

____

____