

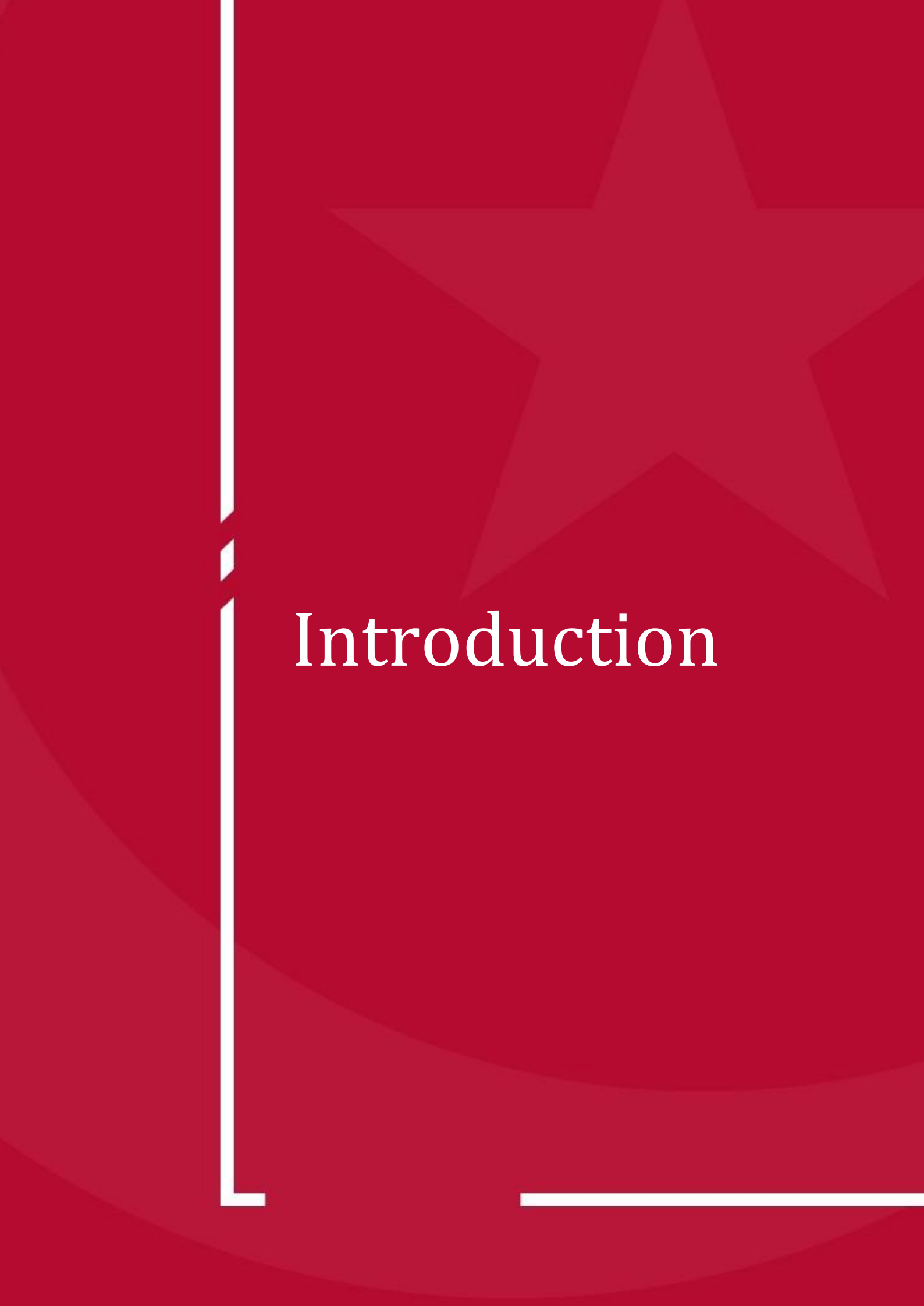
P@SHA Internet Study 2013

Supported By



Survey Conducted By



The background is a solid red color. A large, faint, five-pointed star is centered in the upper half of the image. A white L-shaped line is positioned on the left side, starting from the top and extending down to the bottom, with a small gap in the middle. A horizontal white line is located at the bottom right of the image.

Introduction

INTRODUCTION

P@SHA, the Pakistan Software Houses Association for IT and ITES, commissioned Gallup Pakistan to conduct a survey on the social and economic influence of Internet in Pakistan, particularly the impact of issues of accessibility and power outages in the country.

The study describes the present composition (demographics) of the Internet user, as well as attempting to characterise non-users and to discover likely trends in changing demographic profiles of users and their access techniques and methods in the future.

Other than the users themselves, we further examine sources of information likely to be routinely accessed, in terms of general information, entertainment, sports etc, as well as most accessed activities online, advertising and most popular websites currently visited.

Within the range of access techniques, we studied the available options, locations, device categories, costs and bandwidth. We attempted to cross-match this information with the usage habits of persons from different socio-economic backgrounds, including the time spent online and the frequency of online access. Usage habits further involve the pattern of information access, be it the gain of general knowledge, communication, entertainment, e-commerce, employment (ie work-related) as well as socio-political objectives.

We have studied the impact of mobile Net access, in terms of device ownership, habits and value-added service usage.

In the context of usage, we have studied how accessibility is instrumental in terms of reshaping concepts of social networks, friendships, extended acquaintanceship and so on, and the effect and implications of such trends upon beliefs and attitudes to the control and regulation of the Internet. This detailed understanding was particularly focused on the urban user (where we found a major fraction of users) but we also studied the broad usage and behaviour of rural user-ship.

Finally, we looked at the aspect of non-usership, including ex-users, to understand the factors influencing Net access and the possibility of including such access within the routine lifestyle choices in the future, given the present attitude expressed towards such access.

These profiles were compared and contrasted against key demographic factors, such as income levels, life stages, education and gender.

CONTENTS

Introduction.....	3
Summary.....	7
Study Highlights.....	12
Demographics.....	169

The background is a solid red color. A large, faint, five-pointed star is centered in the upper half of the image. A white L-shaped line is positioned on the left side, starting from the top and extending down to the bottom, with a short horizontal segment at the bottom right.

Summary

SUMMARY

We confirmed that Internet usage across Pakistan is rising. This dictates the necessity of engaging seriously with users as well as non-users to understand the effect of involvement with and across global communications, implying increasingly familiar contact with a broadening of the concept of community, at different levels and with different aspects of routine life, be it related to work or otherwise.

Interestingly, the Net (ie globally interconnected digital networks) is perceived largely, for urban users, as a source of entertainment and communication, rather than a source of information per se. We may speculate why this is so, but in the study, our examination of the Net is seen in the context of usage and exposure to other media, especially television, to which it is most likened. The Net appears to rank high in terms of trust, especially noticeable amongst professional users such as doctors and scientists. However, the bias towards entertainment was noticeable even amongst persons such as students and also persons in the medium to high socio-economic bracket (monthly income 50k+). Along the communications axis, online communicators appear to carry more weightage than persons in the physical space, as far as trust is concerned.

Within entertainment, the Net was overwhelmingly used for accessing (downloading/streaming) video and audio (music and films), and for keeping in touch with a wide social circle (via online community networking sites such as Facebook). However, access to news also figured high, as a popular online activity.

Online commercial activity was found weighted towards the payment of bills and banking services, but only amongst a small percentage of users. Direct commerce, such as buying and selling, hardly figured. As far as direct contact with marketers is concerned, the Net (mostly Facebook) ranked second to television in terms of specific advertisement recall, with print media (newspapers) coming in third.

Within online activity, search (Google) and social networking (Facebook) were most frequently reported, with general portals (Yahoo) and video (YouTube) second in terms of popularity, insofar as frequency of access is concerned.

The trend towards increasing usage was confirmed by comparing the higher numbers of usage amongst persons who reported access over 5 years as against those who have been users for four years or less. Users are also more comfortable with personal access, at home and/or office, rather than the use of shared points, such as cyber cafes, and more with personal devices such as mobiles and laptops. Affordability also plays a role here, hence fixed line access is found more common than WiFi and cable. Reported bandwidth ranged from 512 kbps to 2 Mbps across the country, at costs between Rs 500-1,000 per month. These figures were sharply divided between regions (provinces).

Interestingly, despite the limited breadth of usage reported, the frequency and extent of online access seems to indicate that the Net is considered essential. Daily access of 3 hours and more is commonplace, across a spectrum of users from low-income to graduates and post-graduates. There isn't much difference between weekend and workday usage, in terms of online activities. However, it does seem that some ethnic groups (Punjab, Sindh) consider the Internet more reliable and informative than television.

Within information seeking, news was major, but topics of personal interest and sports is also popular. There is a noticeable gender split, with males seeking out news and sports while women look for healthcare, research/projects and cooking recipes. The two major search resources are Google (maximum) and Yahoo. Aside from text and chat, exchanging photographic material seems very popular. Actually using the capability of self-publishing (posting personal opinions and information via blogs etc) was not reported, compared to relatively passive consumption (ie news and entertainment). Even here, this is more likely to be men than women, insofar as news and sports is concerned, or downloading music/video. The latter is also, not very surprisingly, skewed towards students.

Online commerce is not very extensive, with financial transaction activity being largely banking and bill payment. Such commerce as actually takes place is most often fulfilled through physical cash (cash on delivery), and this can be observed more or less similarly across all demographic groups. However, the possibility of using online commerce to save money seems to be greater amongst lower income reporting groups.

Ethnicity also plays a role in socio-political engagement, with users in Punjab reporting the highest levels of participation, but the overall level of participation, both online and offline, is low. Amongst all user groups work searches and transactions, specifically relating to employment, come across as more popular than any other participatory activity.

Mobile devices are also used for online access, but the penetration of smartphones is limited, with relatively inexpensive devices (below 10k) becoming more generally available. However, breadth of usage is yet to pick up, with reported popularity of value-added services quite low, even though awareness seems high. Specific usage was reportedly for mostly mobile telephony-related activities such as Easy Load and Caller Tunes. Easy Paisa, which leverages mobile accessibility, was also known and used.

Emerging technologies are considered important for general improvement of societal conditions, but there is scepticism about the extent to which this has taken place. The ease of access to rich media communication with family and friends abroad, or elsewhere in the country, is appreciated, and an important reason for being online. It also plays a role in creating new social relationships, but the reported usage is mostly young people.

Commercial services have a long way to go. Poor user experience is said to be a leading reason for this, and possibly the overall infrastructure for e-commerce will need improvement before this sector can be said to have taken off.

Another concern may be privacy, although awareness seems limited to privacy rights as far as social networking (Facebook) is concerned. The possibility of personal data misuse as a consequence of online transactions through insecure methods does not seem to be well understood, as is evidenced by the fact that some people reported that it is the government's responsibility to regulate online commerce for the purpose.

Respondents seemed to be generally agreed on the need to regulate online content accessibility for the young, but not on what that age limit should be. Perhaps the fact that the value of knowledge accessibility is crucial to build a well-balanced maturity plays some role in recommending younger age limits to accessibility here. Encouragingly, no gender bias is noticed.

The rural Pakistani reports that the Internet is useful for discovering ratings on products or films, but for taking action on defects, or for crucial information like the quality of local schools, a physical visit or verification is the norm. Importantly, rural

mobile telephonic connectivity is quite relevant to Internet usage, even more (albeit marginally) than for the urban user, but the latter also has several alternate choices, and uses them.

Once connected, however, the patterns of usage are not really that different, neither in terms of what information is accessed or at what time. As expected, confusion about morals results in many users acknowledging that the Internet is very useful, and simultaneously condemning it for enabling 'immoral' usage.

The majority of residents still do not use the Internet, and we wanted to know why this is. Affordability is a major factor, with about 25 per cent of respondents listing this as a reason, but looking forward to remedying that situation within the next two years. Lack of knowledge of computers, lack of ownership of suitable devices and sheer lack of interest were other major reasons reported.

There is, to some extent, some value judgment reported. Ex-users express a desire and even a plan to get back to using the Net, but those without any usage in the past are extensively sceptical, with less than 25 per cent expressing a desire to use the Net at some point in the future. Alternatives, such as watching television or socialising with friends (both of which may primarily be considered 'entertainment') are used instead.



Study Highlights

STUDY HIGHLIGHTS

Urban

Personal contact, either in person or using the telephone, is important to many urban respondents (30-40%) when enquiring about very local or specific information, such as schools/colleges or travel. However, for product comparisons, or film reviews (formal/informal), or to report product complaints, significantly higher numbers of Pakistanis (40-60%) overall (across all demographics) reported that they prefer to use the Internet.

We looked a little closer, to try and understand this phenomenon. Significantly, both men and women reported more or less the same habits, except that for the category of housewives, the use of the Internet was lower than the national average. Across income groups, as expected, we found that persons with less income resort more often to physical sources of information, but as income levels rise, needs were expressed across categories of information with far more finely nuanced characterisation.

In terms of relative importance of media, the Internet scored higher than television, newspapers or radio, which fared the worst.

We examined the comparative figures across genders, finding that women tend to trust television more than the Internet, preferring to resort to television in preference, in order to satisfy their information needs. This pattern of preference was repeated across income groups, with the highest income level group of respondents reporting the greatest preference for the Internet.

We also asked people from different levels of education to rate emerging over traditional forms of information media, and once again, found that as educational levels increased, the preference for the Internet also rose. The popularity of radio was much lower, compared to competition for mindshare from television and newspapers.

As age increases, so does preference for the Internet, except amongst housewives, who said they prefer newspapers.

Aside from information, entertainment is a very important provision for the media categories we studied (Internet, television, newspaper and radio). Socialising was nearly as important, across the board, as television and the Internet, which scored the highest of the three in terms of expressed preference, with the fourth category, radio, coming a distant fourth. Women are less likely to prefer the Internet than men, but also are more likely to spend time socialising than using any form of media, for the purpose of entertainment.

In terms of essentiality for entertainment, the highest income groups reported more or less the same preference for the Internet as the lower categories, and only slightly less than that for television. Socialising and finally radio were reportedly much less popular. This pattern was repeated across education levels, but surprisingly, the most highly educated reported less preference for either television or the Internet than the less educated respondents, as also for socialising. With very low figures reported for radio, the comparisons are less meaningful.

The pattern changed radically for age categories, with socialising being relatively more important with increasing age, but much less so for either the Internet or television, in comparison with persons in younger age groups. Again, housewives are more likely to socialise, but it must be noted that in terms of comparative preferences, both housewives and retirees say they were less likely to use the Net than younger people. All categories of persons found the Internet to be more reliable (trustworthy) than any other medium.

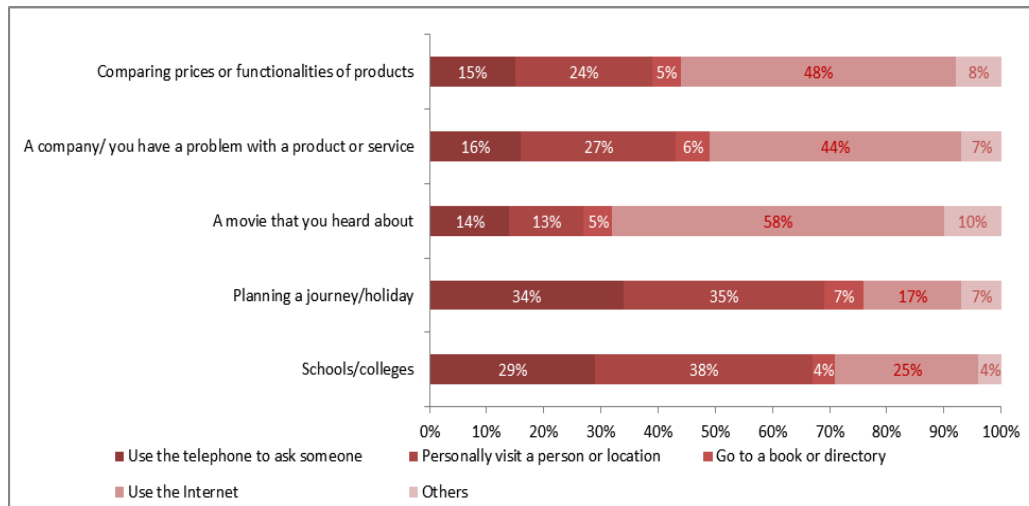
We compared these trust levels with trust in people, by selecting various categories of professions, describing doctors, scientists, or people in Pakistan (in general) with random people met on the Internet. Across the board, preferences were expressed for professionals (most doctors or scientists), but least for other people in Pakistan, even less than for people met on the Internet. The same kind of response was found across income levels of people, with increasing levels of distrust as income levels of respondents rose, but finally when we analysed the responses by life stage (age), we found that older people (retirees) preferred to trust scientists or doctors over uncategorised people in general, whether people in Pakistan or random people communicated with over the Net.

We studied what people do on the Net, asking them to report by activity, such as chatting, social networking, following news, downloading media (music/film) or streaming (movies/videos/drama), which were uniformly the highest usage activities reported. In contrast, e-commerce activities, such as banking, purchasing (buying/selling), bill payments and travel bookings were sharply less popular. Almost inevitably, advertising recall on the Net was also not very high, except for advertising noted on Facebook, whose recall levels were nearly as high as for television, and slightly higher than for billboards. A significant number of people (32%) actually click on online advertisements.

In terms of actual websites recalled (unprompted), Google had the highest reported recall level, followed by Facebook, Yahoo and YouTube, scoring well over reported usage of email (Hotmail/GMail) or Skype, and even MSN (chat). When pressed for specifics, the reported usage patterns were surprisingly similar, but slightly different for men as compared with women.

In the same general category of respondents, we looked for mobile usage, and found it is predominantly basic phone usage, although usage of colour phones, and phones equipped with Bluetooth or Wifi (ie smartphones, primarily) is much higher than plain vanilla mobile telephony devices. Given the capability, about half the smartphone users actually did access the Net using their phones.

Table 1.1: Sources of data used overall



Use of the telephone (29%) and personal visits (38%) have been common when respondents want to seek information regarding schools/colleges and when planning for a journey or holiday (34% telephone users and 35% personal visit). However, most Pakistanis use the internet as the first source of data when they need details about movies that they had heard of (58%), when they want to compare prices and functionalities of different products (48%) and when they face problems with products (44%).

Table 1.2: Sources of data used by gender: Male

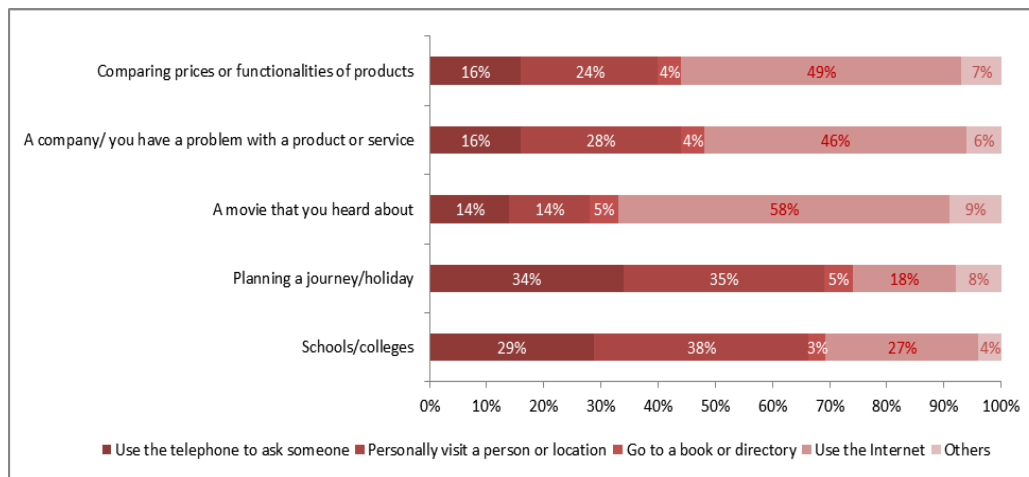
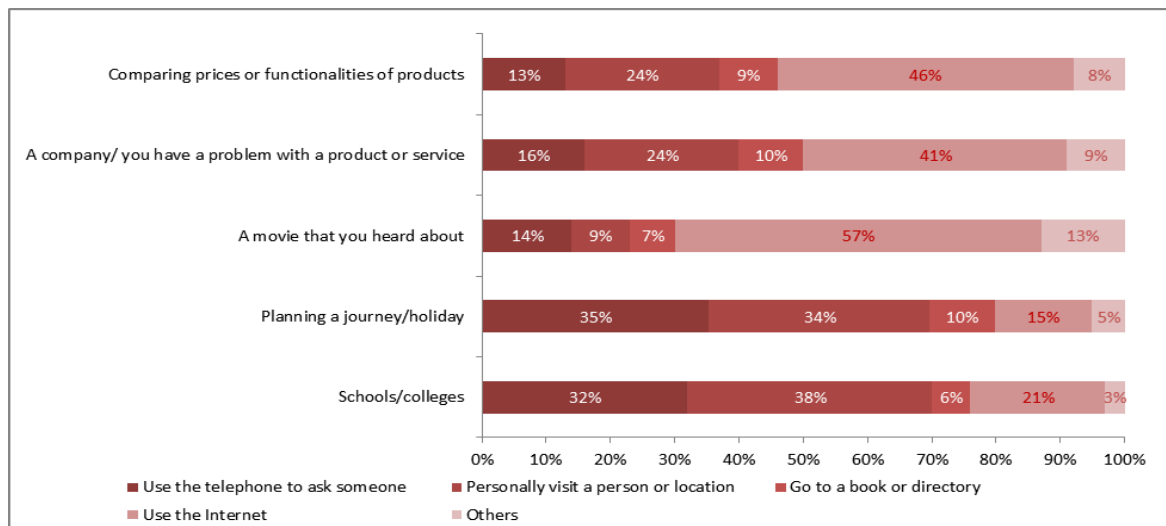


Table 1.3: Sources of Data used by gender, female



There is no remarkable difference found among male [Fig. 1.2] and female [Fig 1.3] users when they look for different sources of information. However, females also turn to books or directories when they don't find enough information on common sources

Table 1.4: Sources of data used by respondents with income up to PKR 15,000

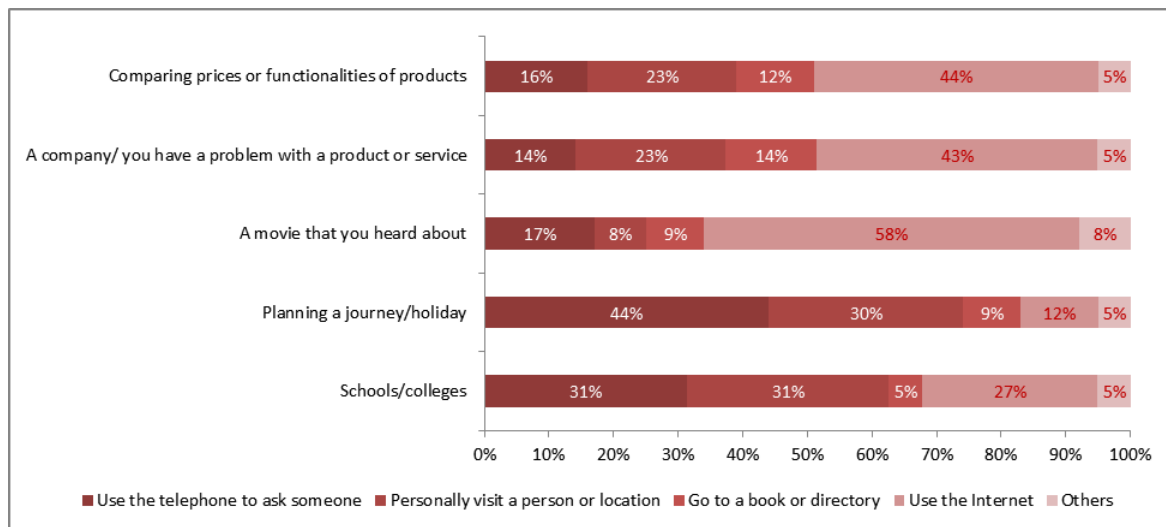


Table 1.5: Sources of data used by respondents with income up to PKR 30,000

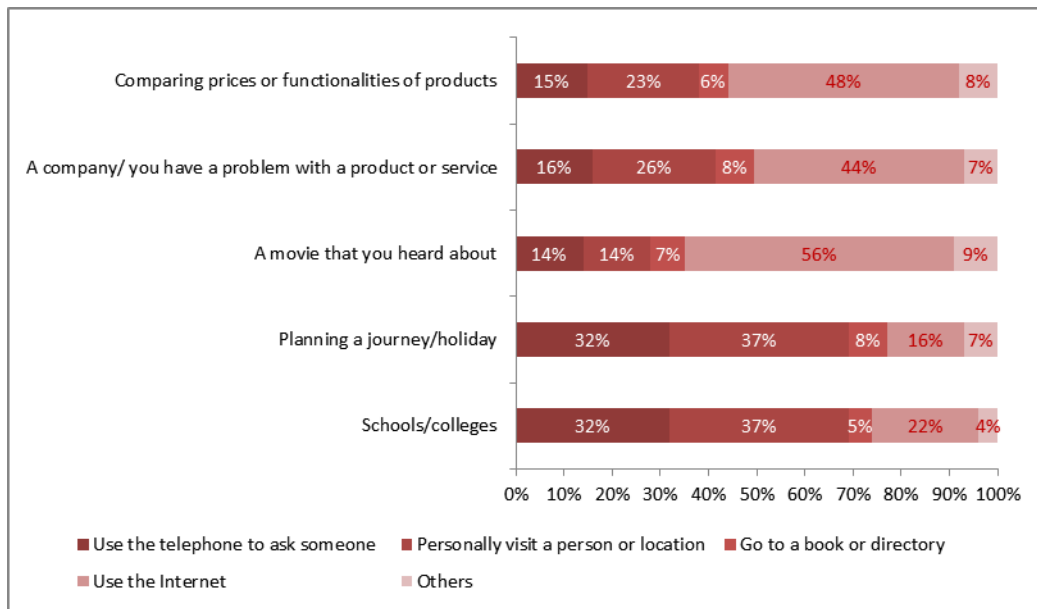


Table 1.6: Sources of data used by respondents with income between PKR 30000-50000

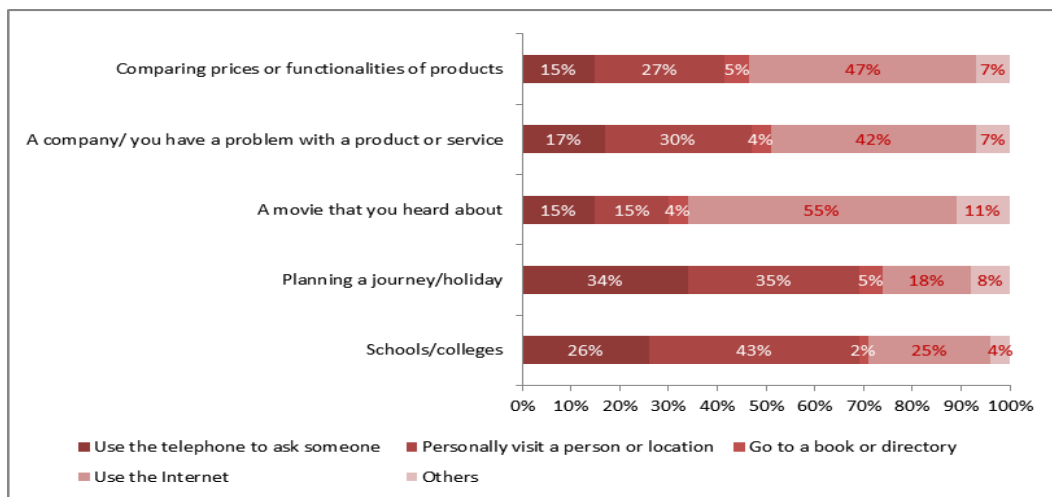
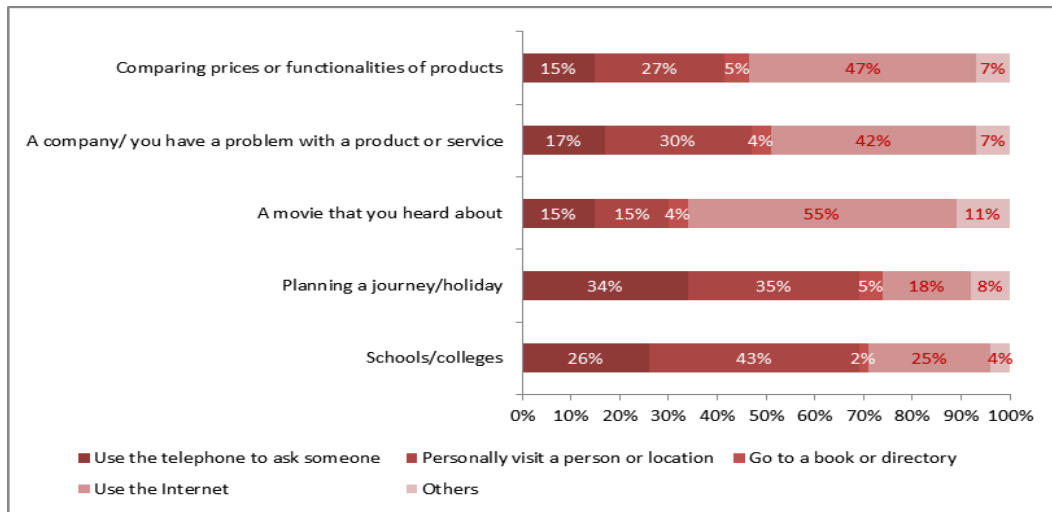
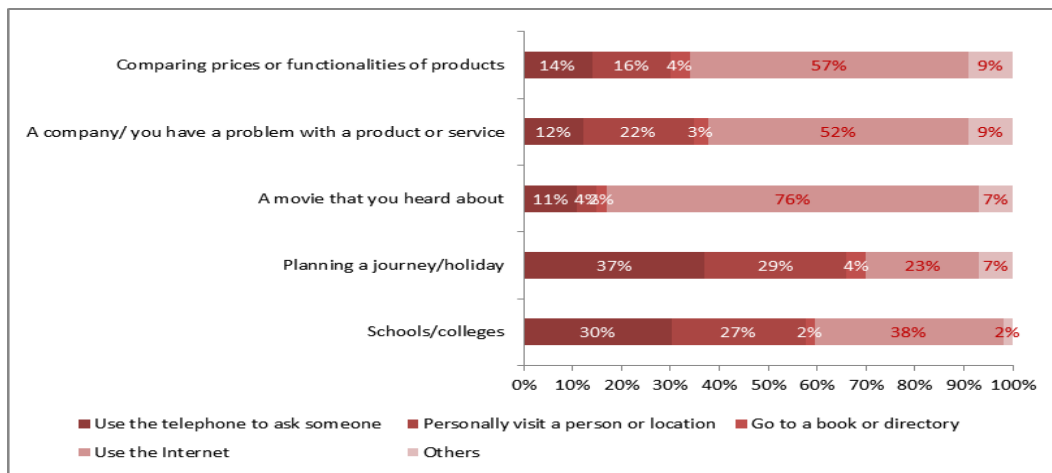


Table 1.7: Sources of data used by respondents with income above PKR 50000



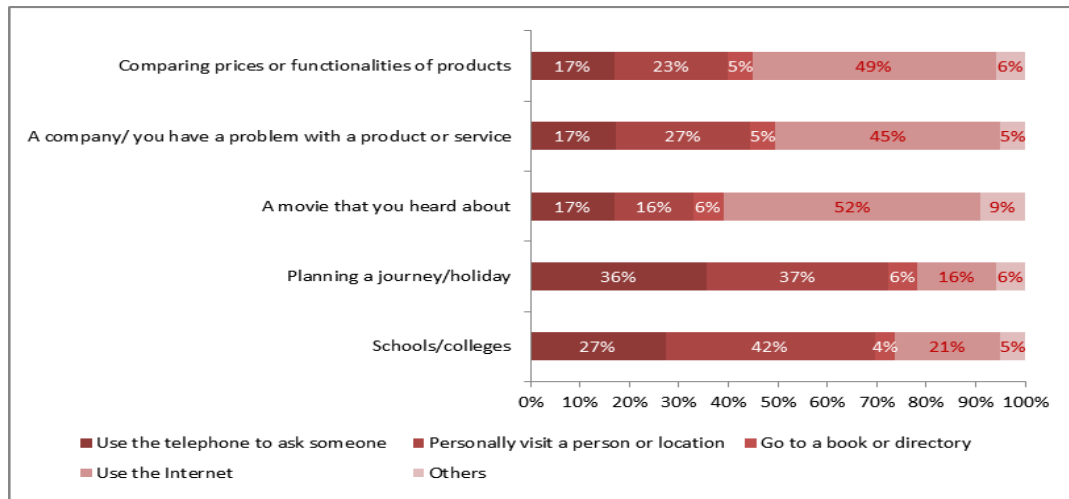
The key observation is that only 12% of low income groups [Fig. 1.4] use the internet while planning a holiday. Furthermore, low income users use books/directories more frequently as a first source of information for all queries. Mid-income users closely mirror the overall trends in terms of internet usage. High-income users have similar internet usage patterns as overall respondents. However, they have higher tendencies to make personal visits to find out more about colleges 43% [Fig. 1.7], movies, and comparing prices as well as to find out more about companies.

Table 1.8: Sources of data used by students (n=721)



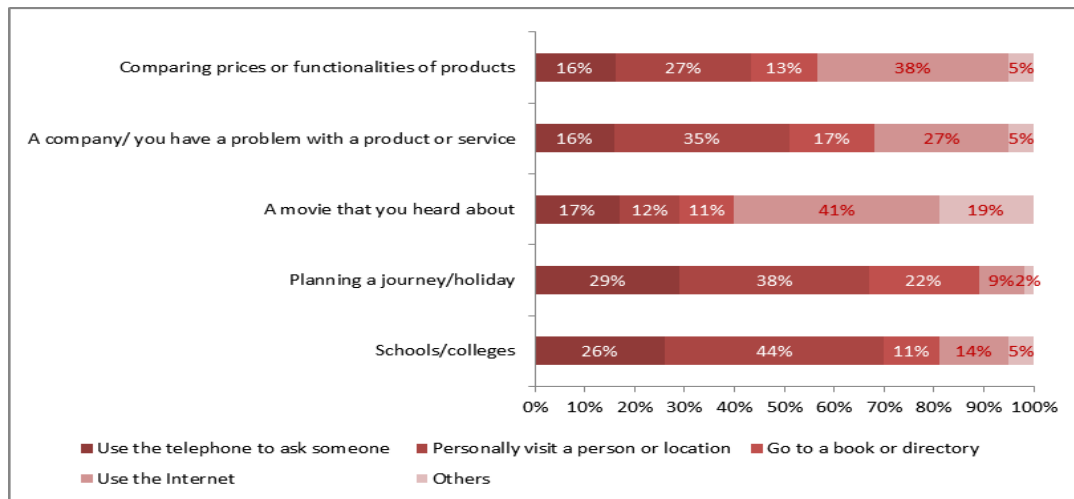
More students use the internet as the first source of information more frequently than the overall respondents. Overall, they prefer lesser personal visits (perhaps owing to the low mobility expected of students).

Table 1.9: Sources of data used by employed respondents (n=721)



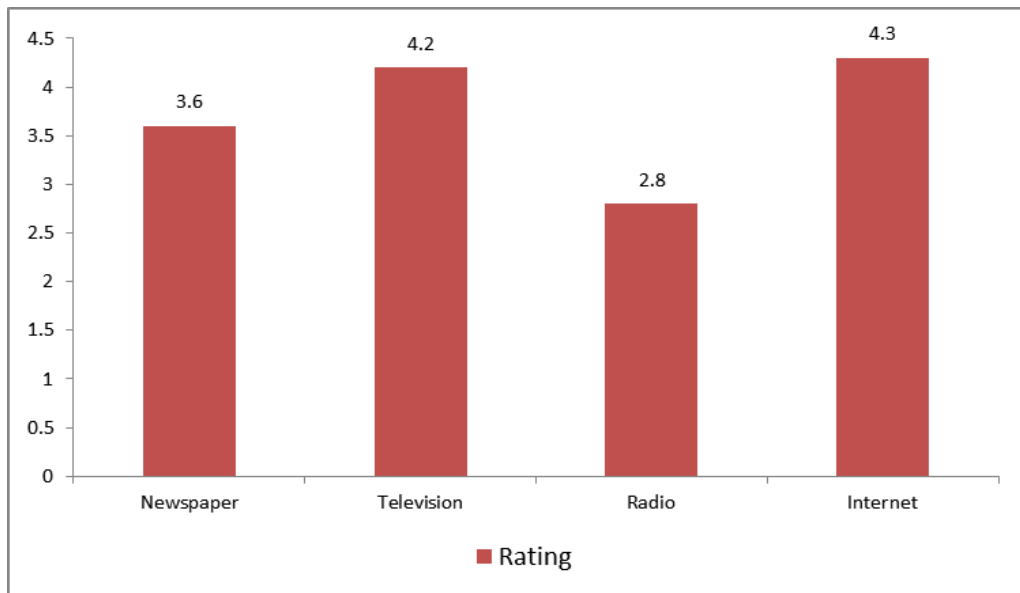
Employed Pakistanis use the internet slightly less for finding out more about movies and colleges – favouring personal visits over using the internet.

Table 1.10: Sources of data used by housewives (n=110)



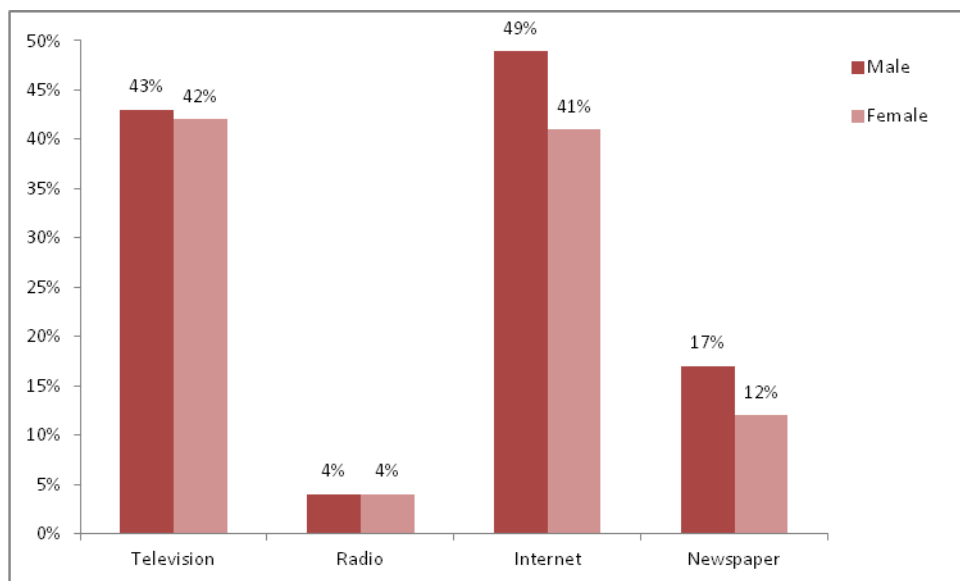
Housewives turn to personal visits and books/directories when first looking for information on various concerns. Their use of the internet is much lower than the national average for all categories, especially when they are looking for information on companies and while planning holidays.

Table 1.11: Average rating of importance given to media as information source



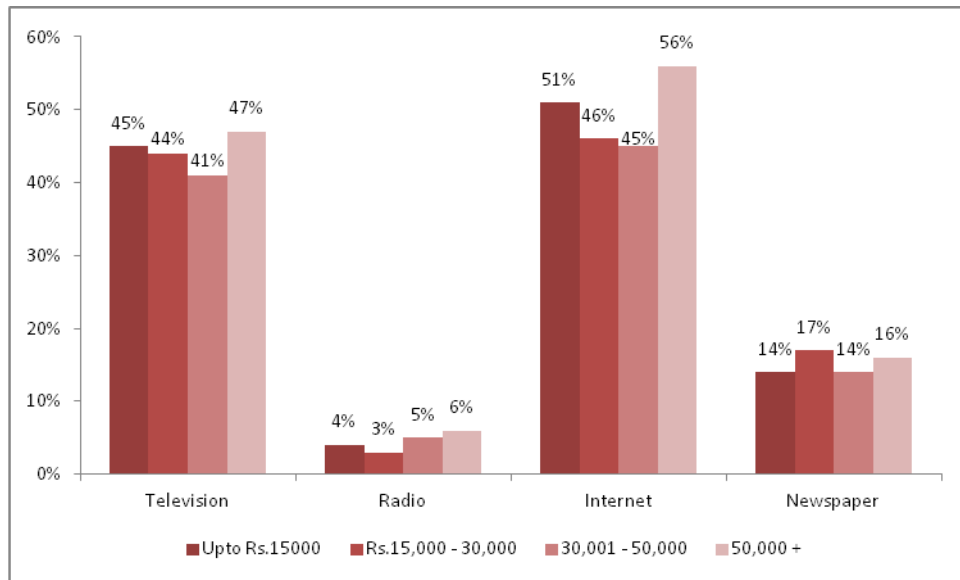
Overall users consider the internet as the most important source for information (4.3) followed closely by TV (4.2).

Table 1.12: Percentage of respondents identifying types of media as “essential” information source, by gender



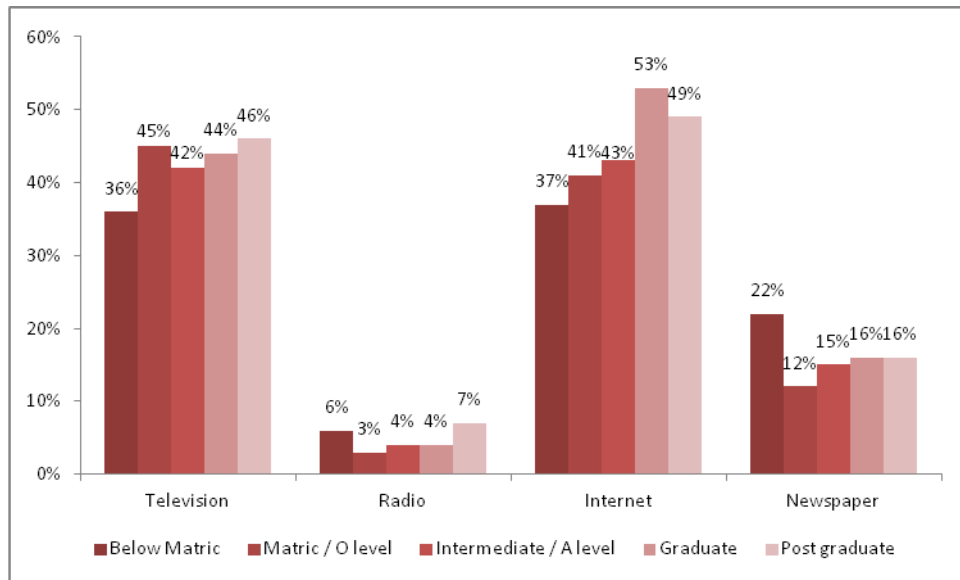
For both genders, internet is essential but they differ in 8 percentage points i.e females are less inclined towards internet as compared to TV (42%). However, males preferred Internet (49%) over TV (43%). Both genders regard TV as an essential source of information – with the female gender preferring TV to the internet.

Table 1.13: Percentage of respondents identifying types of media as “essential” information source, by income group



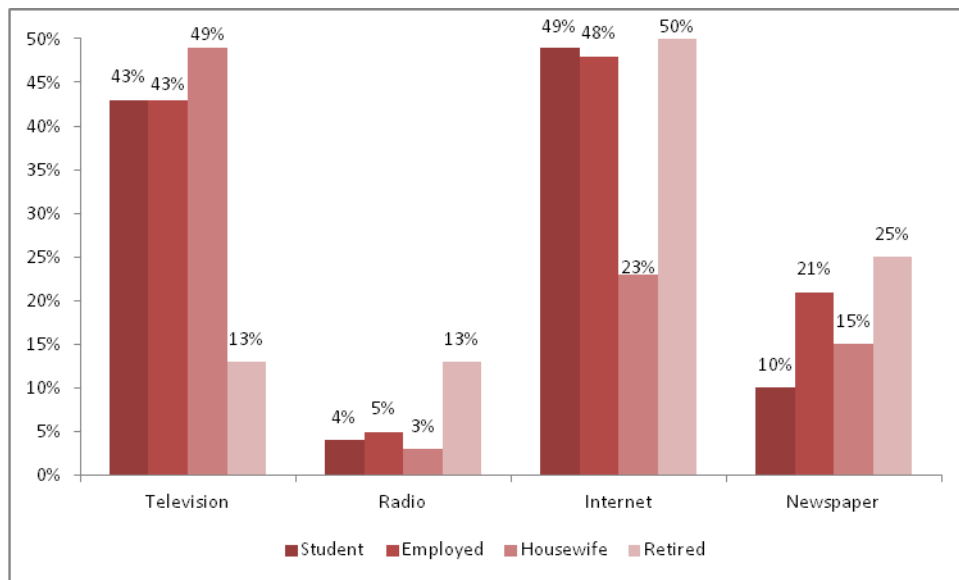
All income groups consider the internet as the most important source for information followed by TV. The chunk of users preferring the internet over TV is the largest in the highest income group.

Table 1.14: Percentage of respondents identifying types of media as “essential” information source, by level of education



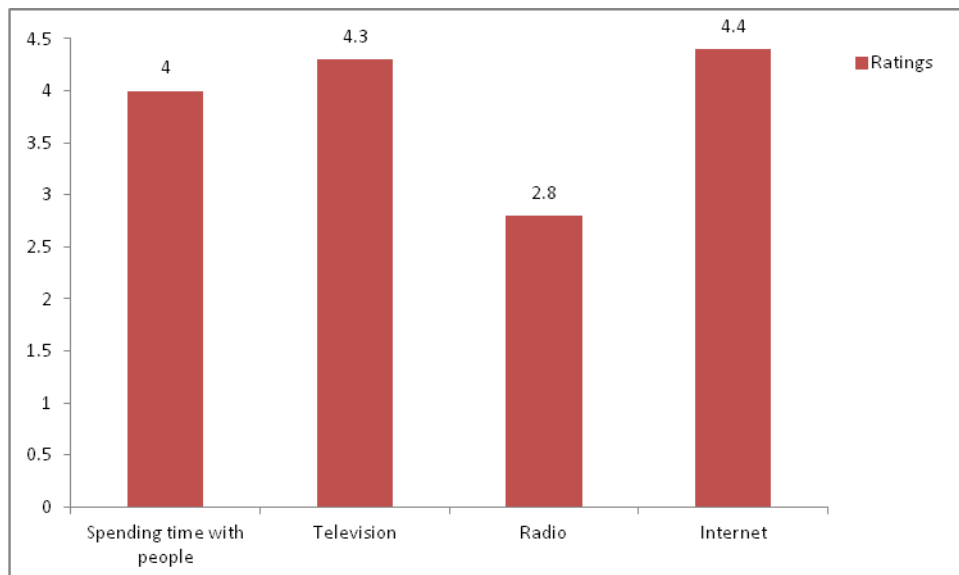
Graduates and above are more inclined towards internet as the most important source of information followed by TV, whereas less educated respondents consider both sources almost equally essential. Interestingly, the least educated group have the highest inclination to consider newspapers as essential when compared to other educated groups – this could be a reporting bias.

Table 1.15: Percentage of respondents identifying types of media as “essential” information source, by life stage



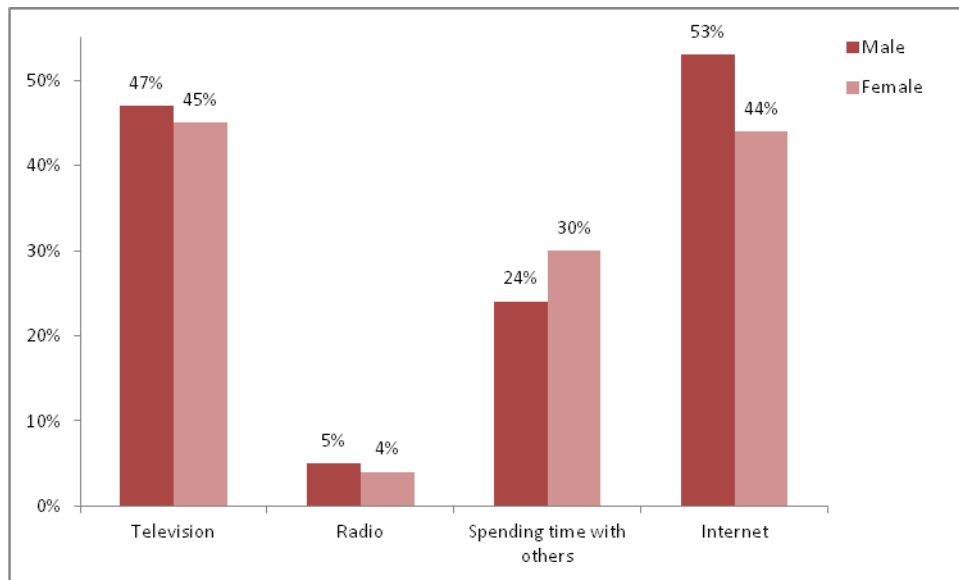
As compared to other groups of this segment, housewives give less importance to the internet as a source of information while all other groups of this segment thought internet is an essential source of information. People are significantly less dependent on newspaper and radio. A healthy 50% of retired respondents regard the internet as an essential source of information.

Table 1.16: Overall average ratings of entertainment sources



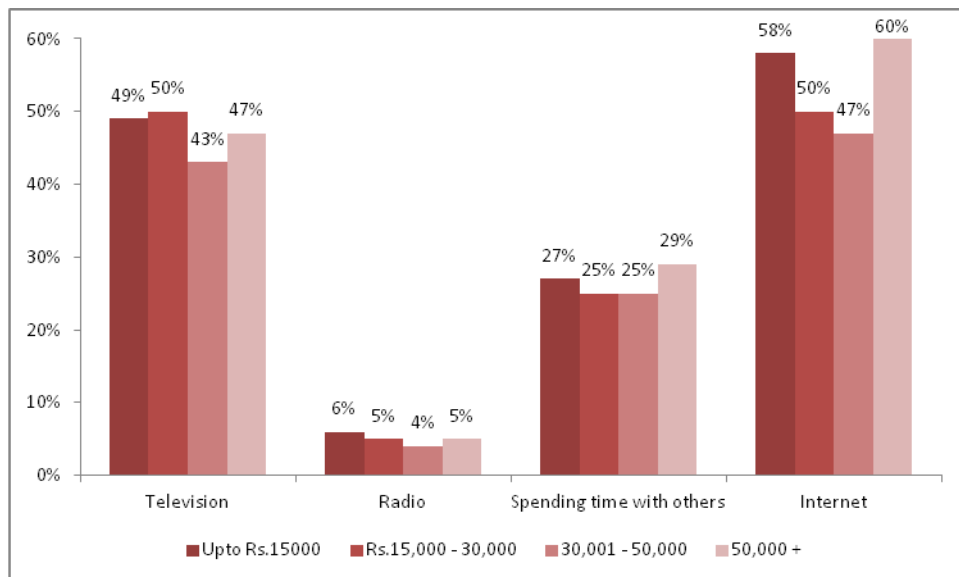
Life has become fast paced and people do not get as much time to socialize with each other and thus internet has become more popular as far as entertainment is concerned. The internet is more important as a source of entertainment overall (4.4) vs. TV (4.3) and spending time with other people (4).

Table 1.17: Percentage of respondents identifying types of media as “essential” entertainment source, by gender



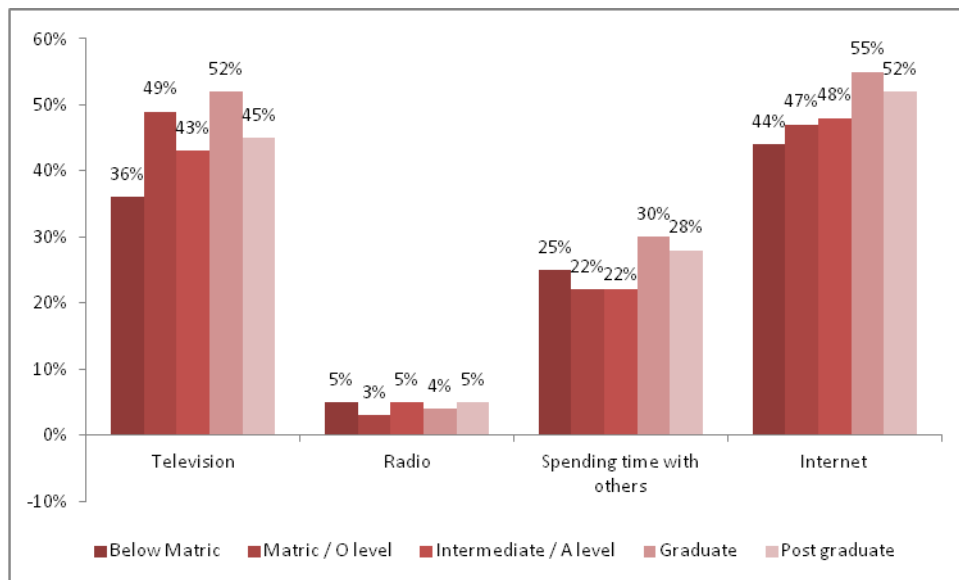
53% of males preferred internet as an essential source of entertainment followed by TV (47%). Females are 1 percentage point more likely to watch TV than Internet. They also assigned more importance to socializing with people (30%) as compared to males.

Table 1.18: Percentage of respondents identifying types of media as “essential” entertainment source, by income group



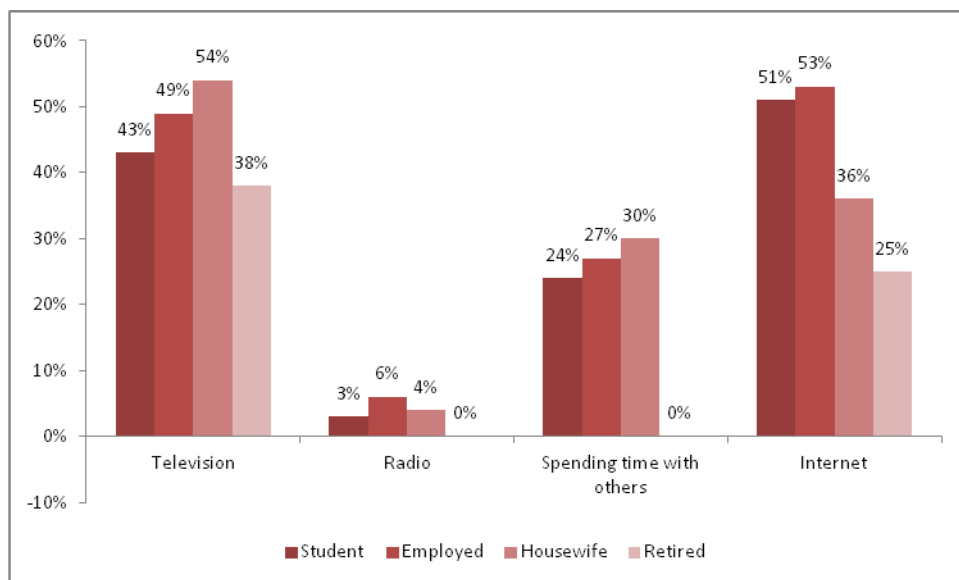
60% of higher income group (Rs. 50,000 +) preferred internet as an essential source of entertainment followed by lower (up to Rs. 15,000) group (58%). Lower-mid income group (Rs. 15,000 to 30,000) gives equal importance to internet and television for entertainment (50%). Radio is the least essential source of information for all income groups.

Table 1.19: Percentage of respondents identifying types of media as “essential” entertainment source, by education level



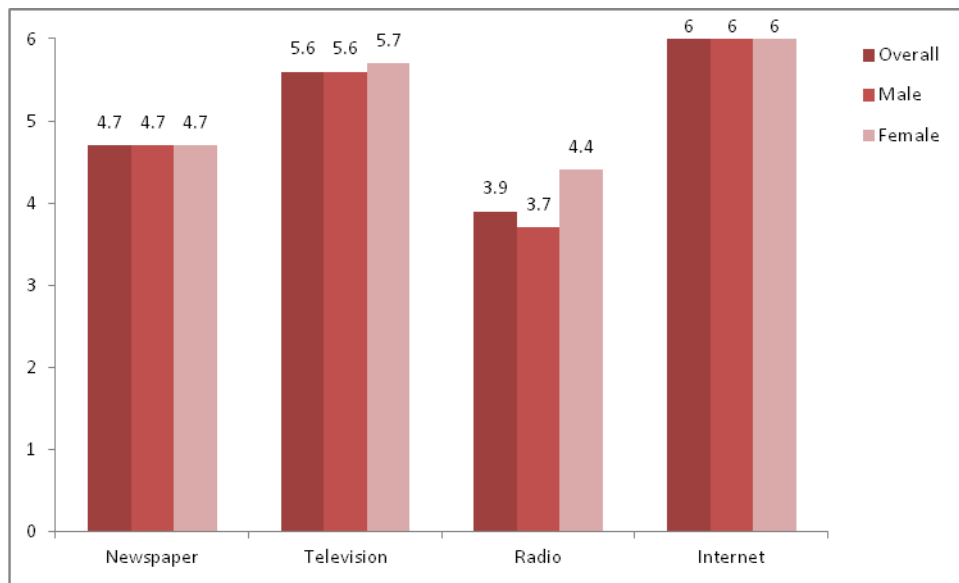
At all levels of education other than matriculates, the internet is more important for entertainment than spending time with other people and watching television. However for Matric/'O' level graduates, TV (49%) is more important than the internet (47%).

Table 1.20: Percentage of respondents identifying types of media as “essential”



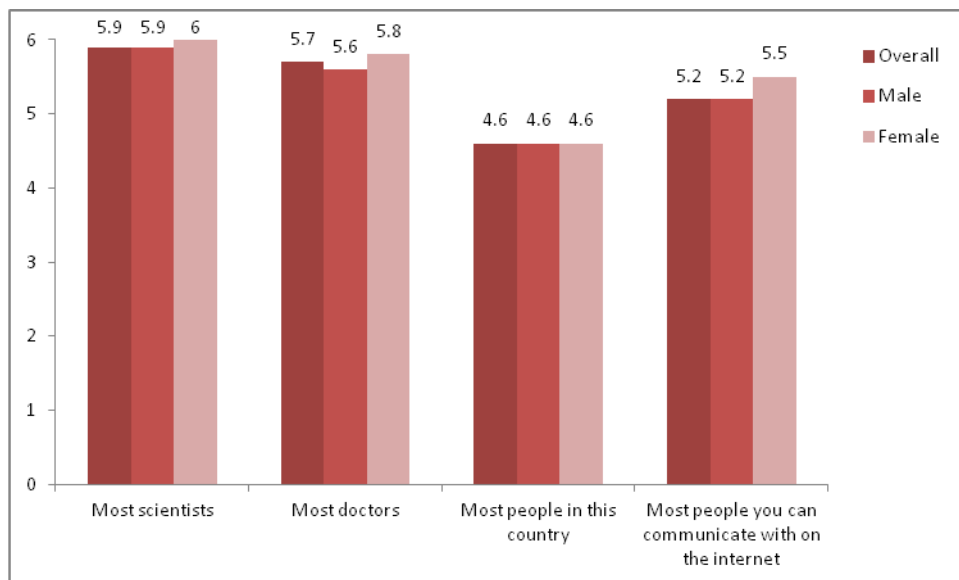
Employed (53%) and students (51%) assigned most importance to internet, whereas for housewives watching television remained most important. 30% of housewives also reported spending time with others as essential.

Table 1.21: Overall and gender-wise average ratings of respondents' level of trust in different media



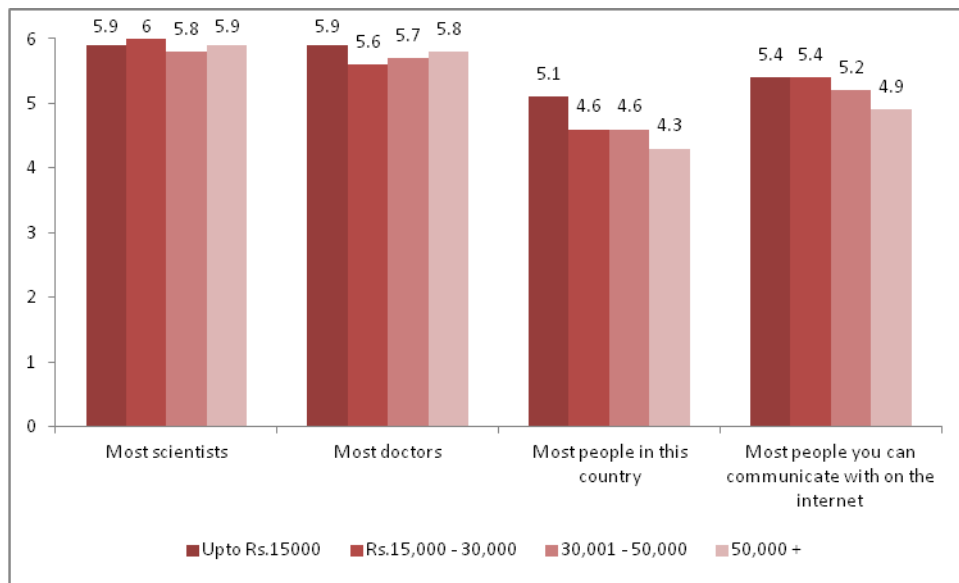
The key take out is that users trust the internet more than other media. This does not differ among males and females.

Table 1.22: Overall and gender-wise average ratings of respondents' level of trust in people



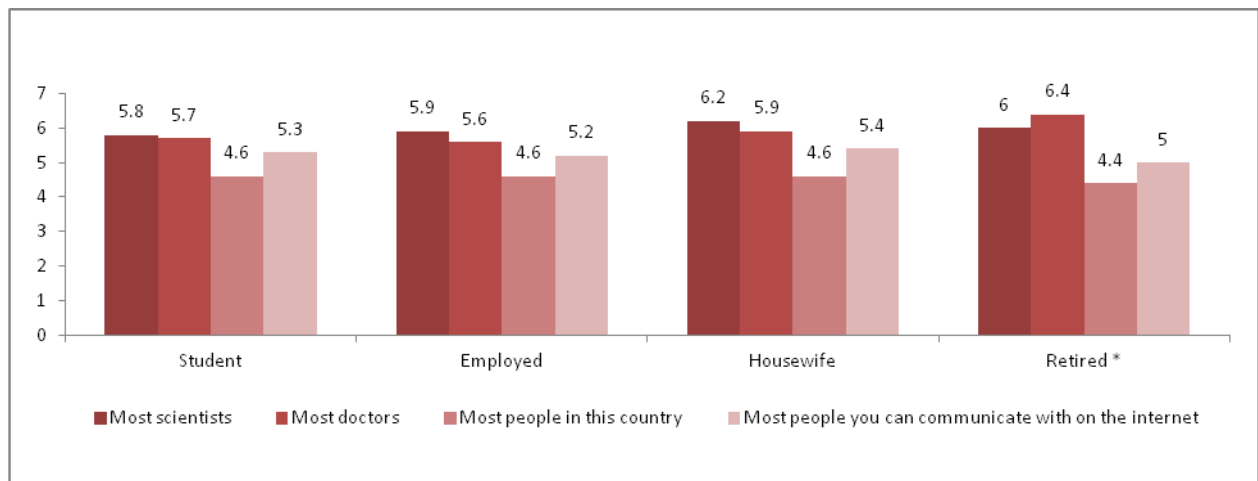
Scientists were found to be the most trusted followed by doctors. Internet users trusted the people they communicated with on the internet more as compared to most people in the country.

Table 1.23: Average ratings of respondents' level of trust in people, by income



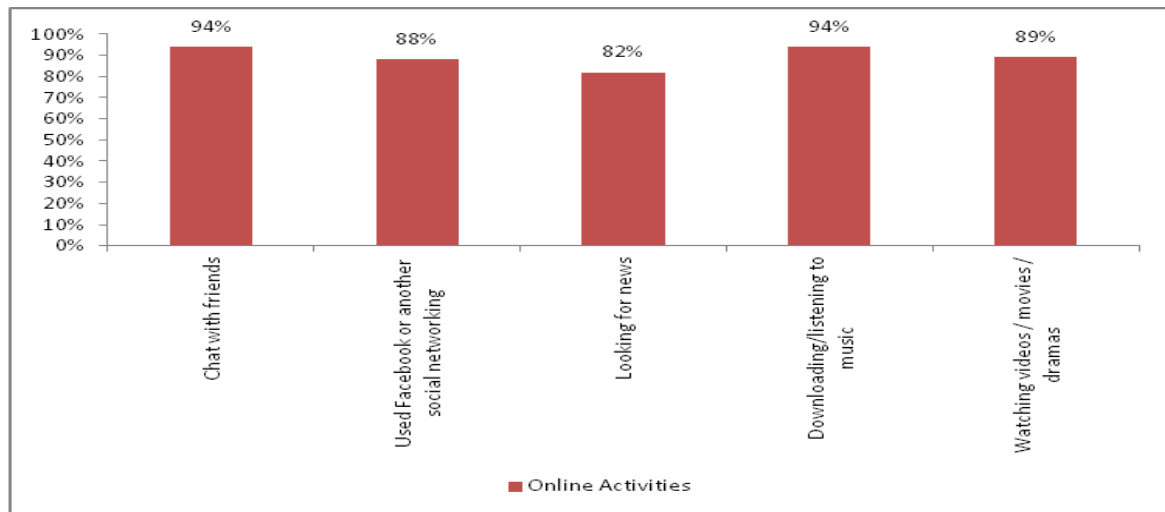
Overall trust decreases as the income increases. However, the trend of trusting people with whom the respondents communicated with over the internet more than most people in the country remains the same across all income groups.

Table 1.24: Average ratings of respondents' level of trust in people, by life stage



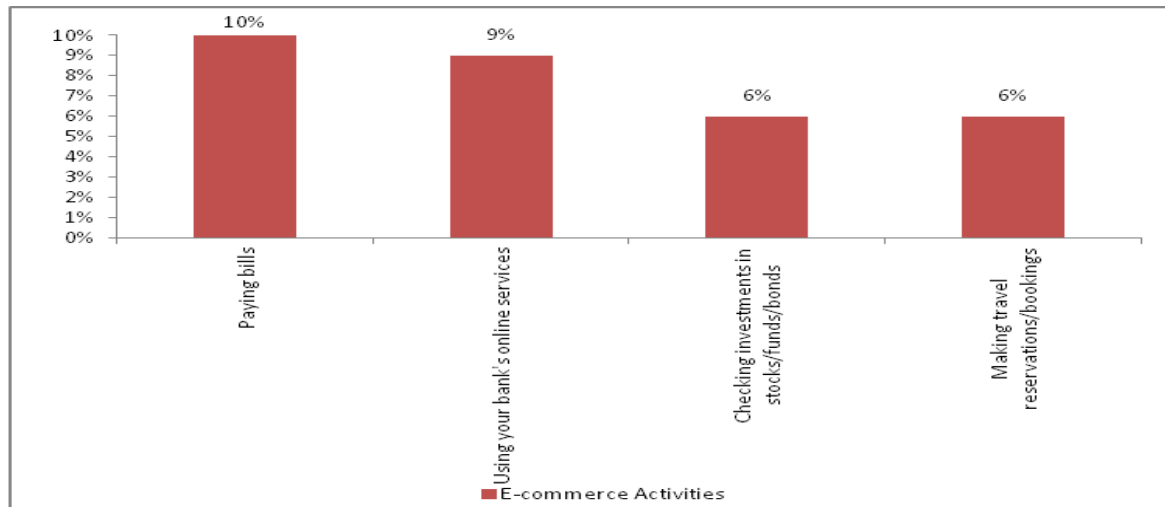
The group that stands out here are the retired respondents - they have much higher trust in scientists and doctors vs. the national average and lower trust in people with whom they communicate with over the internet than the national average.

Table 1.25: Top online activities (overall)



Overall, the 5 most common online activities nationally were chatting with friends, using social networks like Facebook, searching for news, downloading music and watching movies. Chatting with friends and downloading music took the major chunk (with 94% share each) followed by watching videos/movies (89%) as the most popular online activities. Besides, social networking on Facebook (88%) and searching for news (82%) emerged as the other popular online activities.

Table 1.26: Top e-commerce services used online (overall)



Within the e-commerce sphere, the 4 most commonly used services are paying bills, using a bank's online services, checking investments and making travel reservations with paying bills (10%) and using online bank services (9%) were the most commonly used e-commerce activities among those who used any kind of online service.

Table 1.27: Overall ad recall on various media vehicles

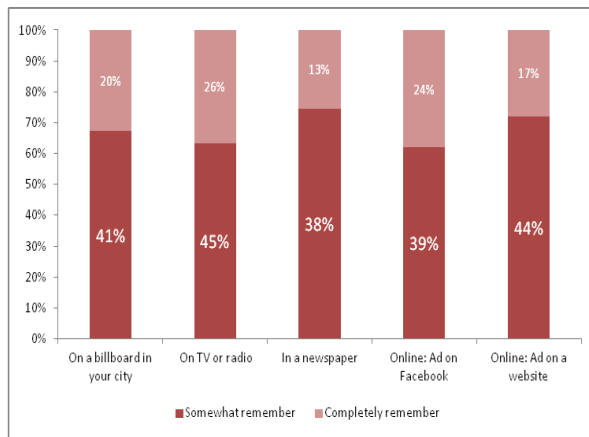
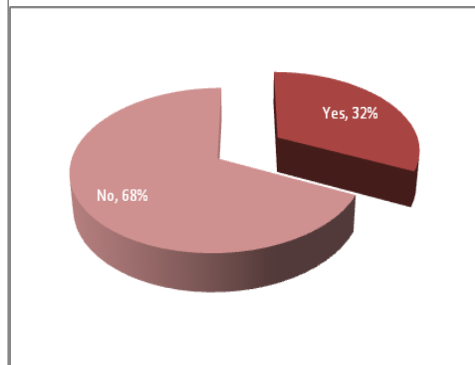


Table 1.28: % of respondents who have clicked at least once

Ever clicked on an Internet ad?



Respondents had the highest recall for ad campaigns on TV – but ads seen online on Facebook had a surprisingly high recall as they came in a close second to TV and had higher recall than ads seen on billboards. Summarily, 63% of the respondents remembered the last ad that they saw on Facebook [Fig. 1.27] vs. 61% who remembered the last ad that they saw on a billboard [Fig. 1.27]. Out of those who had seen internet ads, 32% clicked on one [Fig. 1.28].

Table 1.29: Types of mobile phones used (Base: 1392)

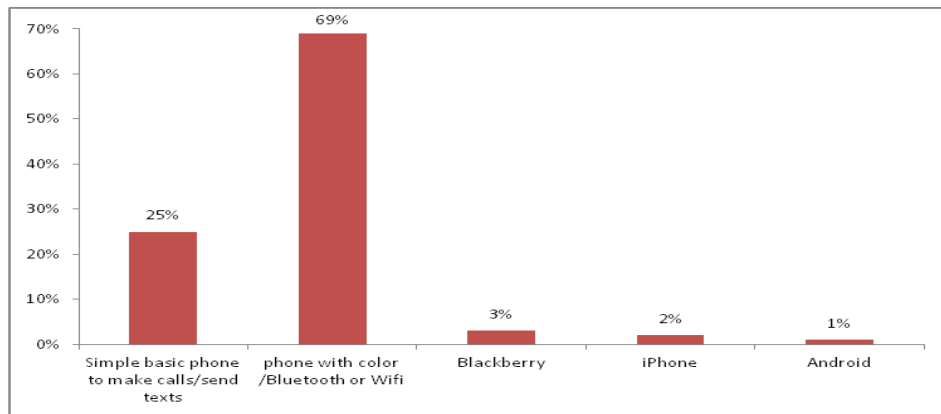
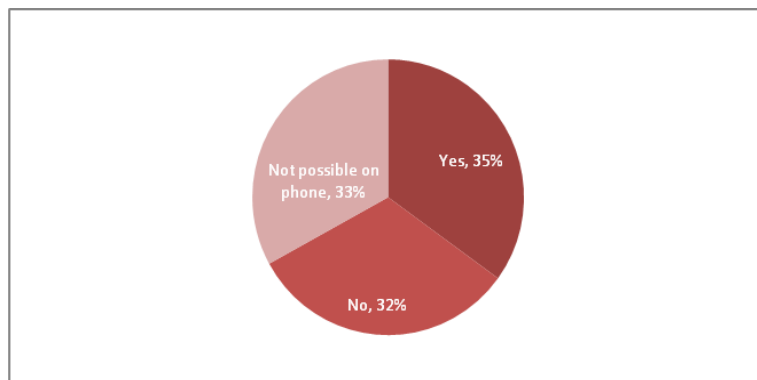


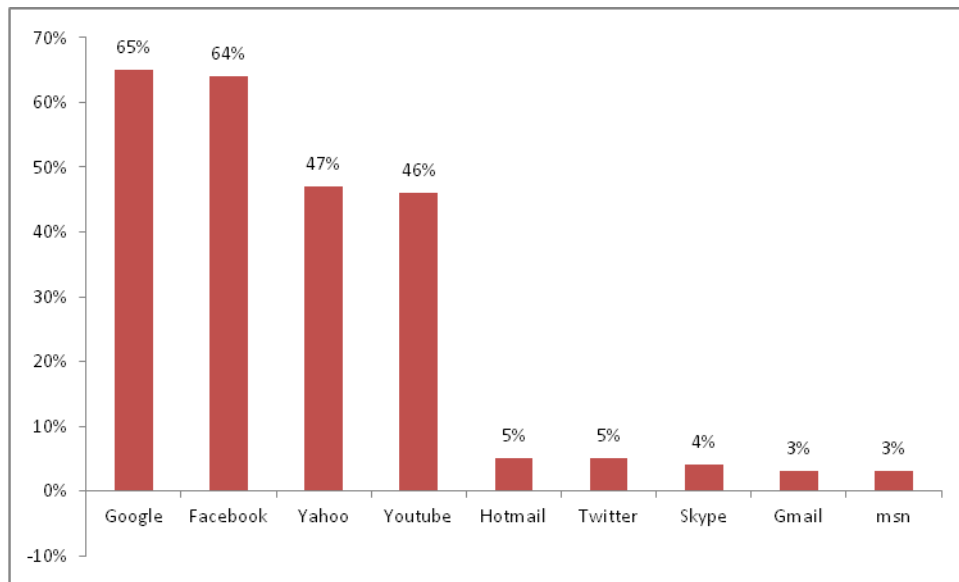
Table 1.30: Percentage of total respondents using mobile internet



69% of those who owned a mobile phone [Fig. 1.29] were using a phone with colors, Bluetooth and /or Wi-Fi. Interestingly, the other 25% were using simple basic phones with only the basic features of making calls and sending texts.

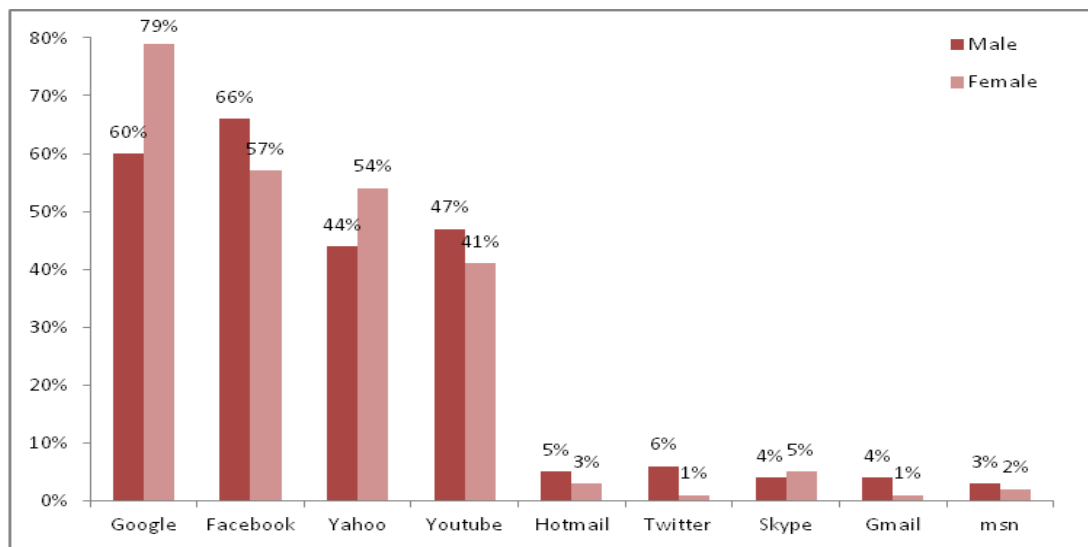
Out of those who had internet capability on their phones, a majority did use the internet [Fig. 1.30].

Table 1.31: Most visited websites, overall



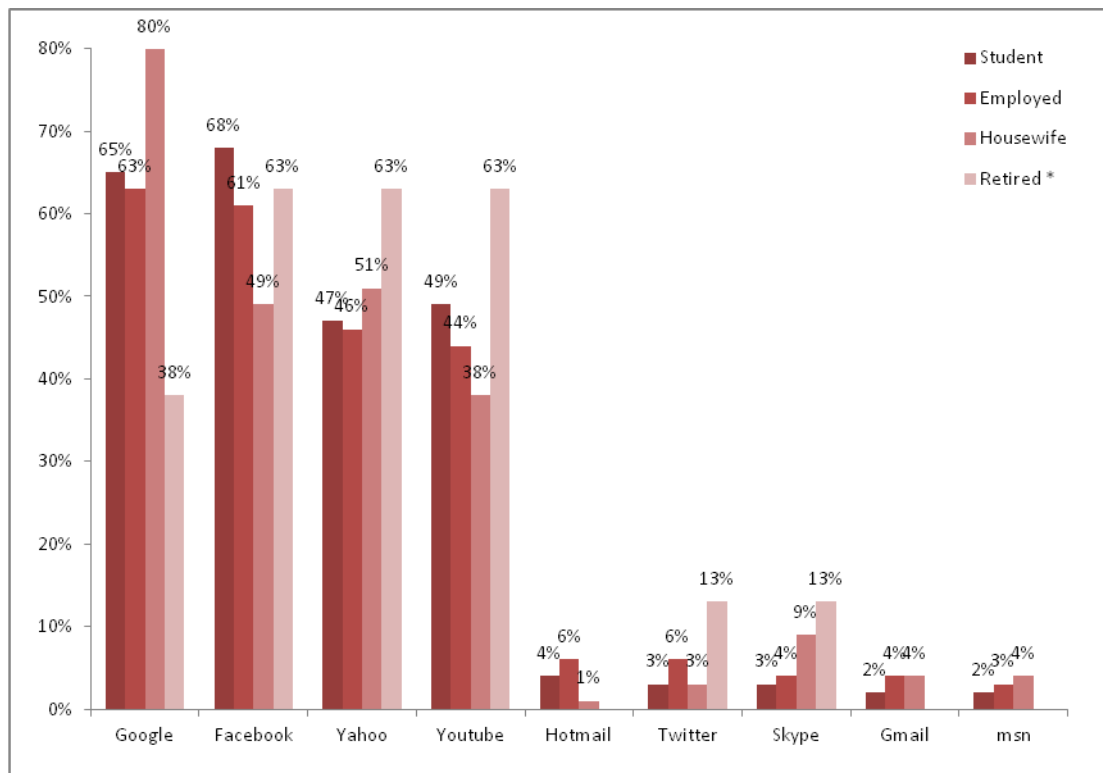
At unprompted level, Google (65%) was named as the top visited website among all the users followed by Facebook (64%), Yahoo (47%) and Youtube (46%).

Table 1.32: Most visited websites, by gender



Males are more active in social networking and video sharing as they mostly visited Facebook (66%) and Youtube (47%), whereas females preferred search engines like Google (79%) and Yahoo (54%) followed by social networking websites such as Facebook (57%).

Table 1.33: Most visited websites, by life stage



The students and employed groups are evenly distributed among search engine and

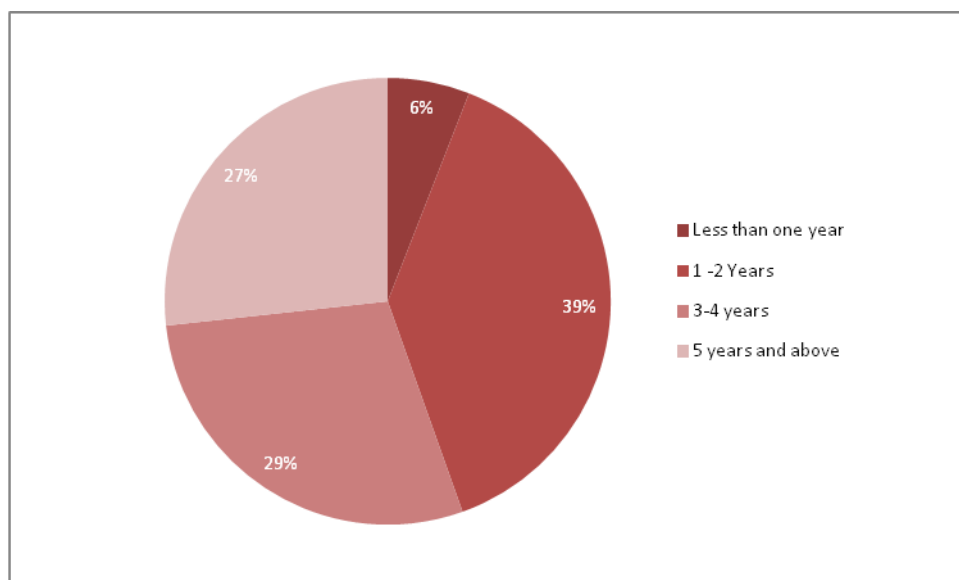
Facebook, but housewives who are internet users seemed more curious than others and mostly visited websites through search engines like Google (80%). Retired segment used YouTube, Yahoo and Skype more vs other life stage segments.

Access

We found that, broadly, a reasonably significant (just over a quarter) of respondents had Net access and used it for over 5 years, compared with hardly six per cent who had gained such access only within the last year. Within the long-term users, more were men than women, and more users had higher income and higher education. Usage is growing, with both students and housewives reporting access for 1 to 2 years. Mostly, access took place within the home, but young student women were more likely than men to gain access at school/college/university. Some high-income respondents also use the Net while travelling.

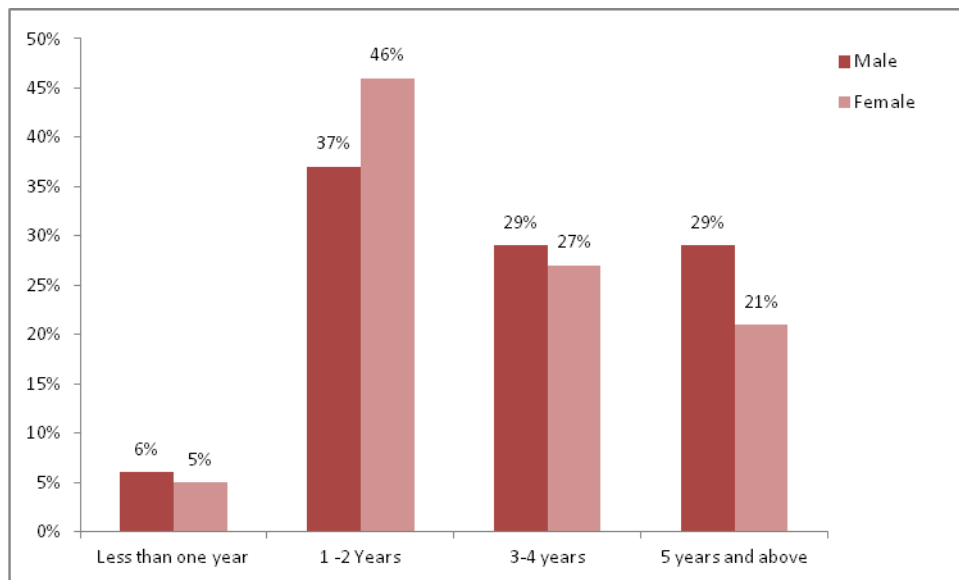
Most users gain access through a laptop or desktop (personal computer), and as many as 30% use both a mobile as well as a personal computer for access. Slightly more women use only a mobile phone, as do more users in general belonging to lower income groups. Most household access is through a telephone line, with cable service a distant second. Over a third of respondents reported paying in excess of Rs 1,000 per month for their regular internet access.

Table 2.1: Internet usage break up according to number of years it has been used



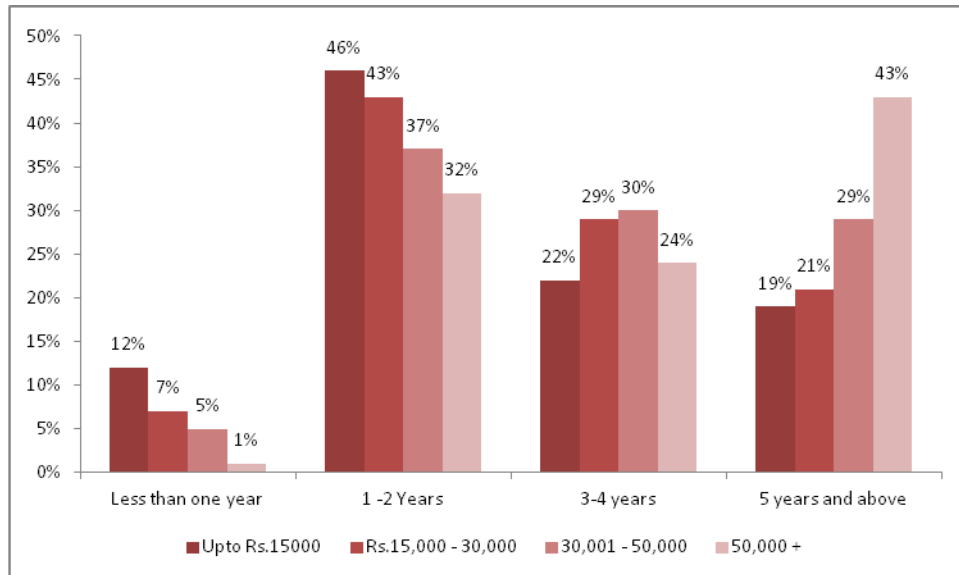
67% of internet users have been online for the last 1 to 4 years. 27% of the users have been online for 5 years and more.

Table 2.2: Internet usage: how long it has been used, by gender



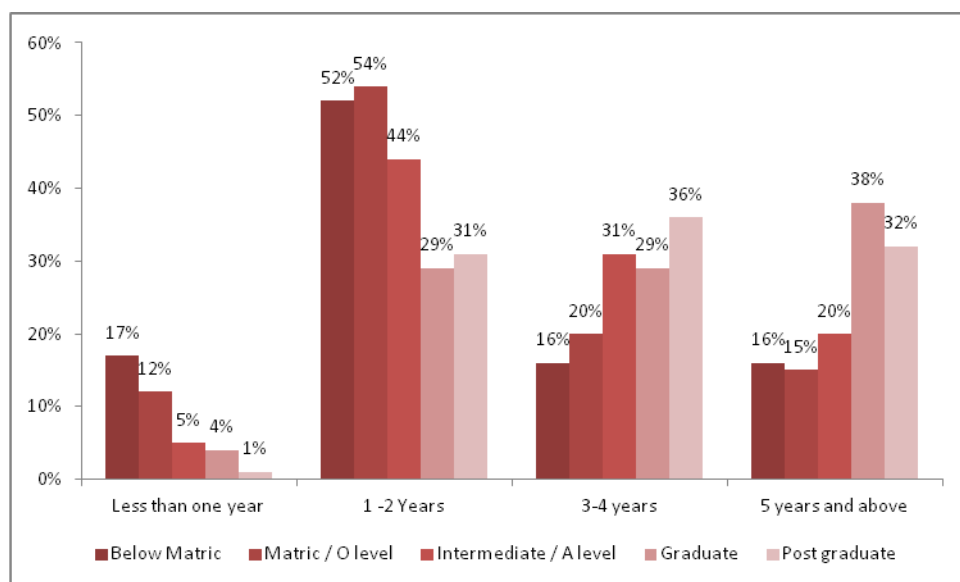
Males have used the internet for much longer compared to females. Over half of the males (58%) have used the internet for more than 3 years. Females have had shorter internet usage history as 46% have only been using the internet for last 1-2 years.

Table 2.3: Internet usage: how long it has been used, by income



The higher income groups have been online for longer vs. lower income groups. More than two thirds of the Rs. 50k+ income group (67%) has been using internet for 5 or more years whereas most of the lower (46%) and middle income groups (43%) started using the internet during the last 1-2 years.

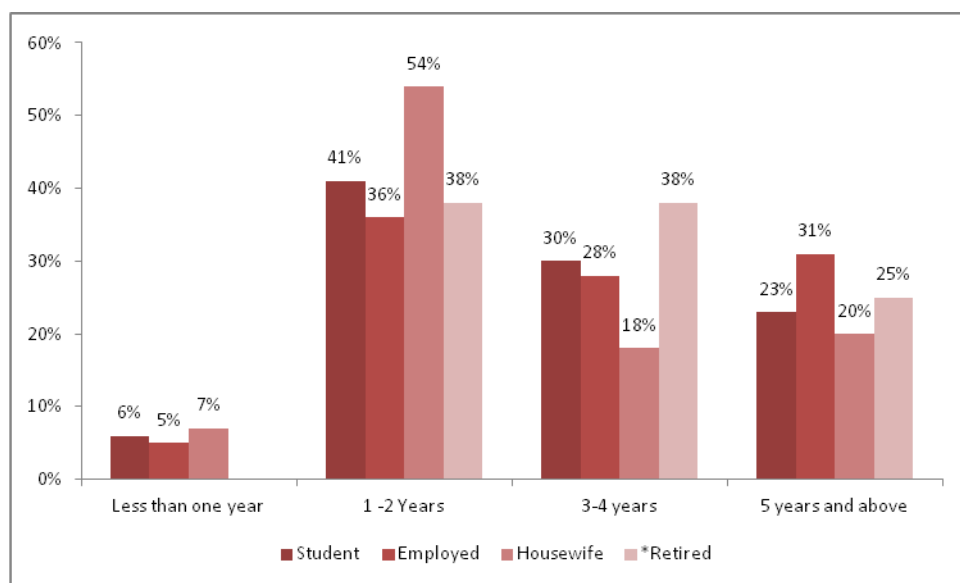
Table 2.4: Internet usage: how long it has been used, by level of education



Higher level of education is strongly associated with a higher likelihood of using the internet. Graduates (67%) and post graduates (68%) have been using the internet for the last 3-5 years or more. Those with lower education levels have recently started using the internet.

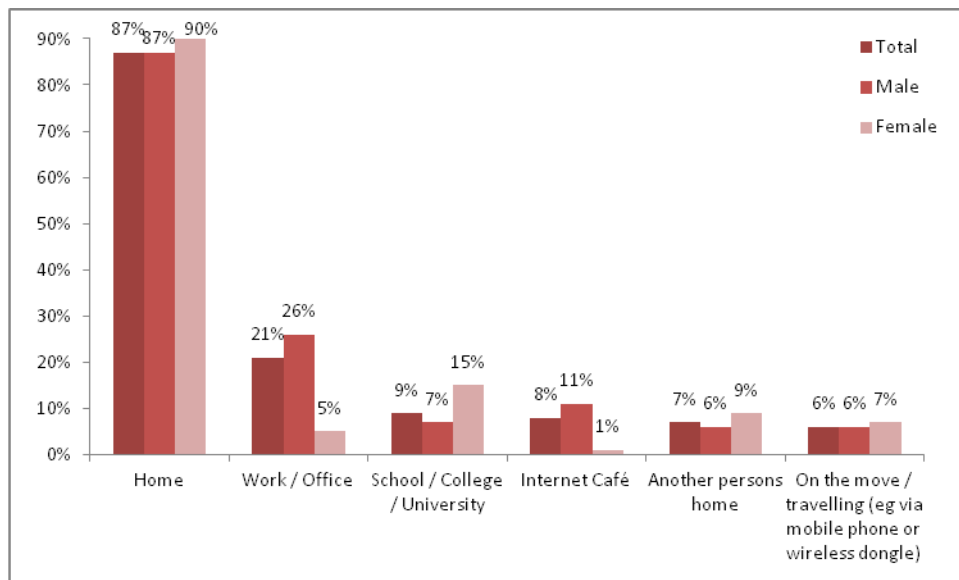
Table 2.5: Internet usage: how long it has been used, by life stage

* Caution: Small base. Not relevant for statistical significant analysis



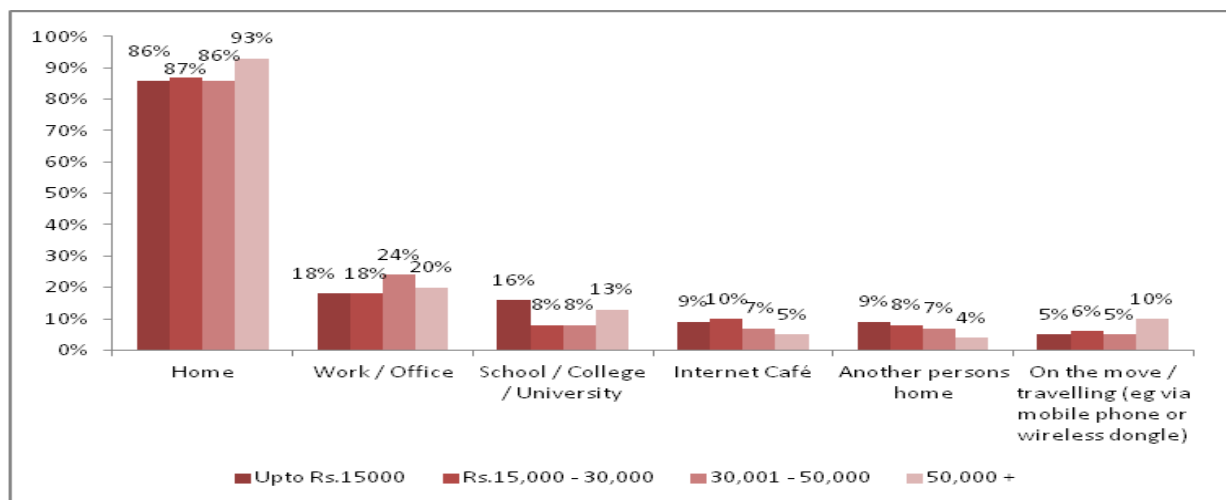
Employed users emerged as the most experienced users as they have been online for over 5 years followed by students who remained online for the last 3-4 years. More than half of the housewives (54%) started using the internet in the last couple of years. A majority of respondents from all life-stages have only been online for the last 1-2 years.

Table 2.6: Internet usage: where internet is accessed from, by gender



Employed users emerged as the most experienced users as they have been online for over 5 years followed by students who remained online for the last 3-4 years. More than half of the housewives (54%) started using the internet in the last couple of years. A majority of respondents from all life-stages have only been online for the last 1-2 years.

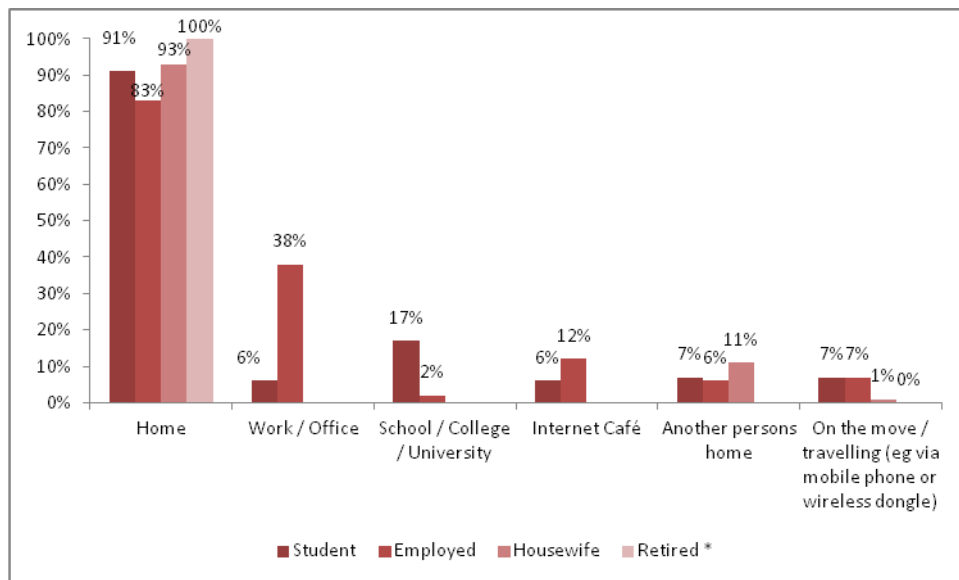
Table 2.7: Internet usage: where internet is accessed from, by income



Lower income groups use the internet more frequently than the national average at schools/universities/colleges.

Table 2.8: Internet usage: where internet is accessed from, by life stages

*Caution: Small base. Not relevant for statistical significant analysis



Besides home, students easily access the internet at their institutions (17%) while employed persons are online at their workplace (38%). Housewives also find it convenient to use the internet at another person's house (11%). 7% of students and employed respondents use the Internet on the move.

Table 2.9: Internet usage: types of devices used for access, overall

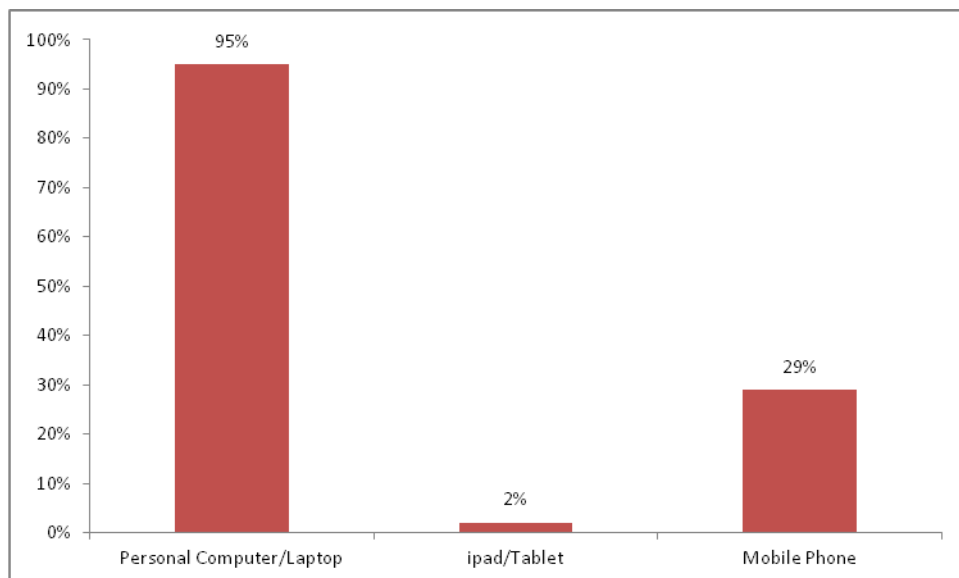
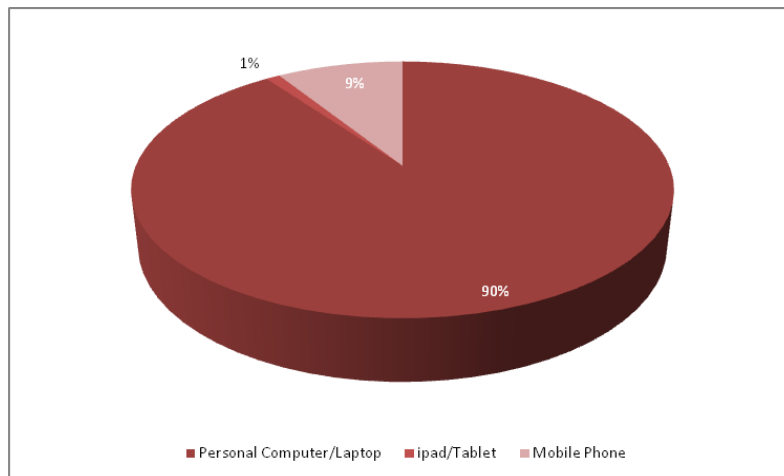


Table 2.10: Internet usage: device used most often, overall



95% of respondents connect to the internet via a PC or a laptop while 29% connect via a mobile device [Fig. 2.9]. Encouragingly, 9% [Fig. 2.10] of the respondents use their mobile phones as a primary means of connectivity.

Table 2.11: Internet usage: types of devices used for access, by gender

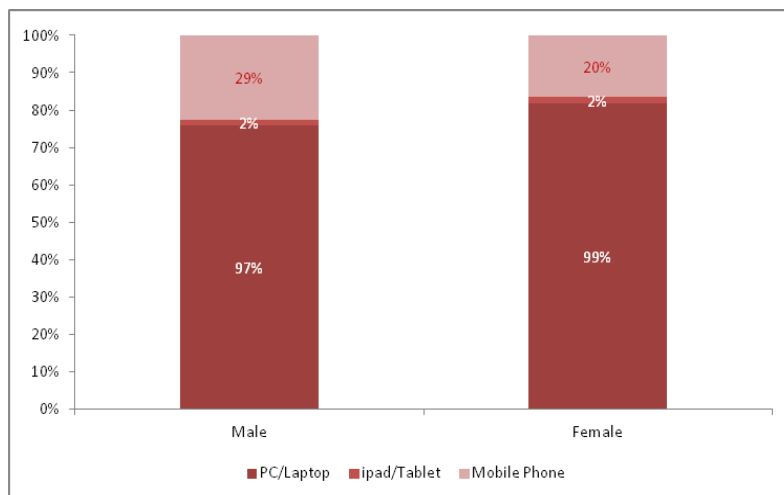
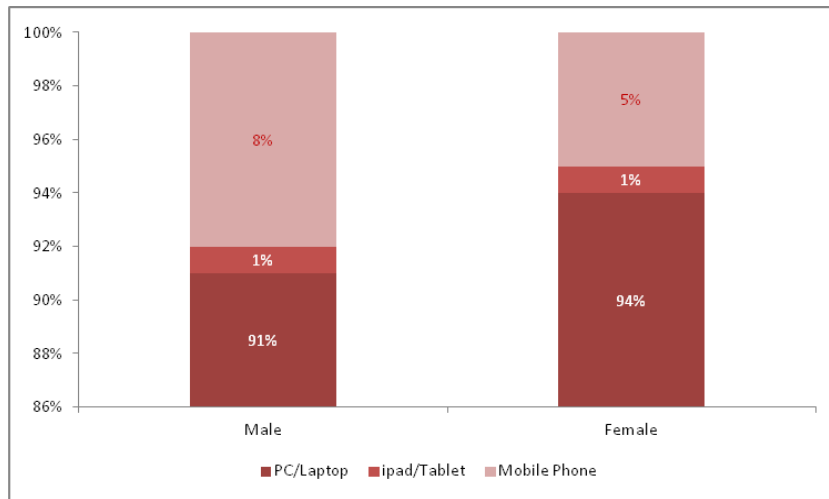


Table 2.12: Internet usage: device used most often, overall, by gender



Both genders preferred PCs/Laptops for using the internet [Fig. 2.11-Fig. 2.12].

Table 2.13: Internet usage: types of devices used for access, by income

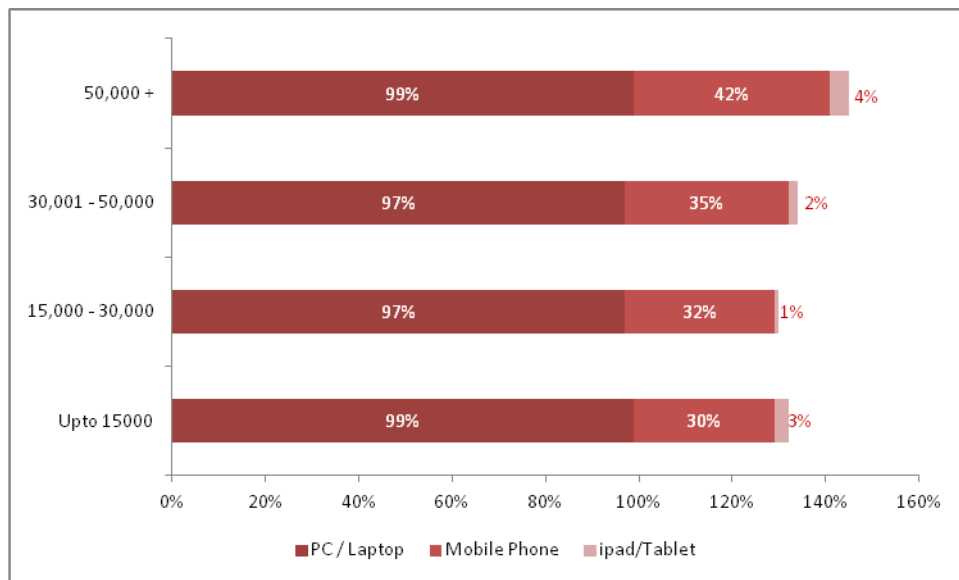
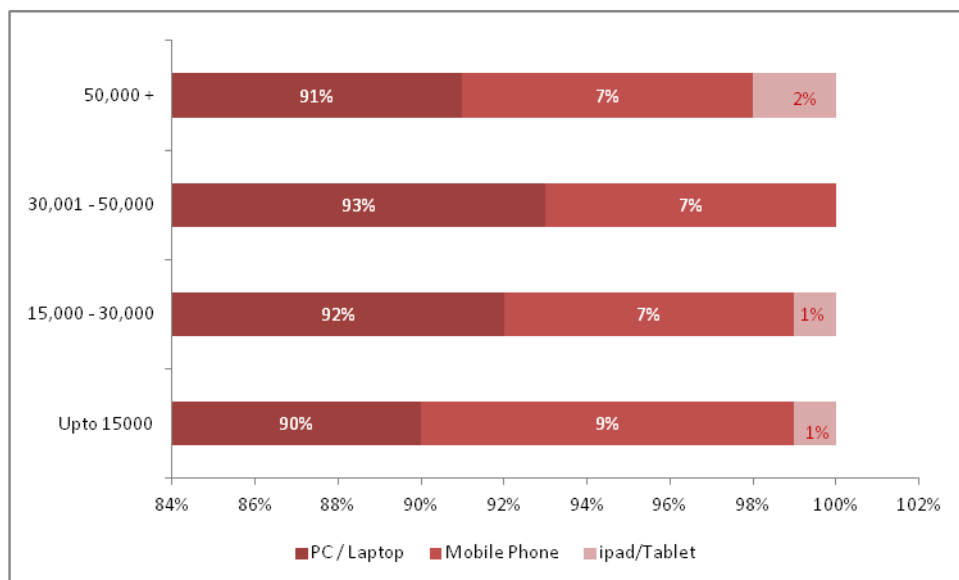
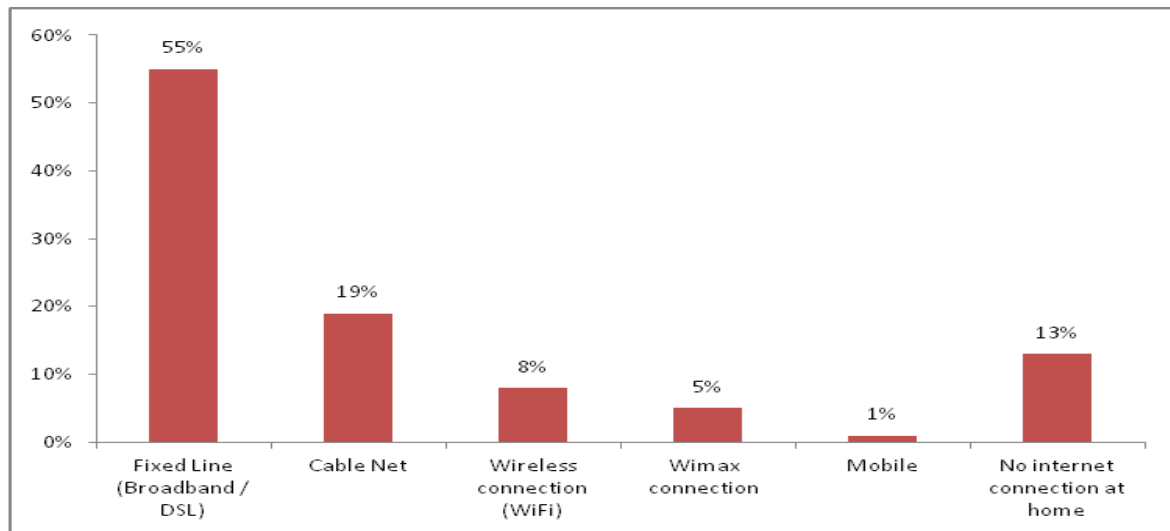


Table 2.14: Internet usage: device used most often, by income



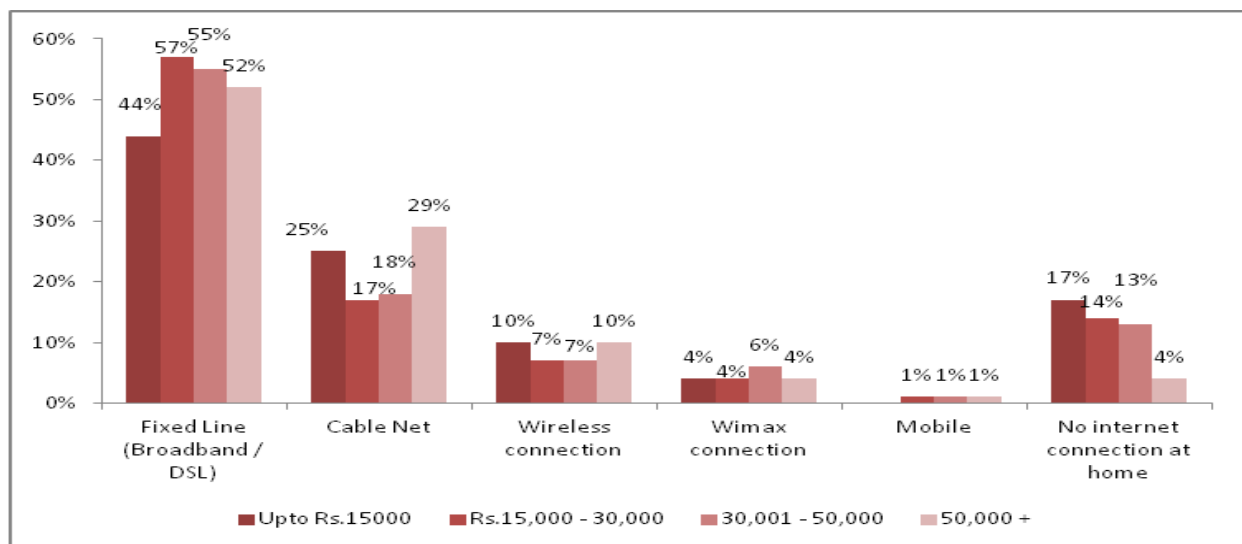
All income groups tend to use multiple technologies to get connected. Within the higher income groups (Rs. 50,000+), the usage of mobile phones as secondary connectivity devices grows exponentially vs. other income groups as 42% of respondents in this income bracket also use their mobile phones to stay connected [Fig. 2.13]. However, a surprising 9% of the lowest income group (Rs 15,000 and below) use their mobile phones most frequently to connect [Fig. 2.14].

Table 2.15: Internet usage: types of access in household, overall



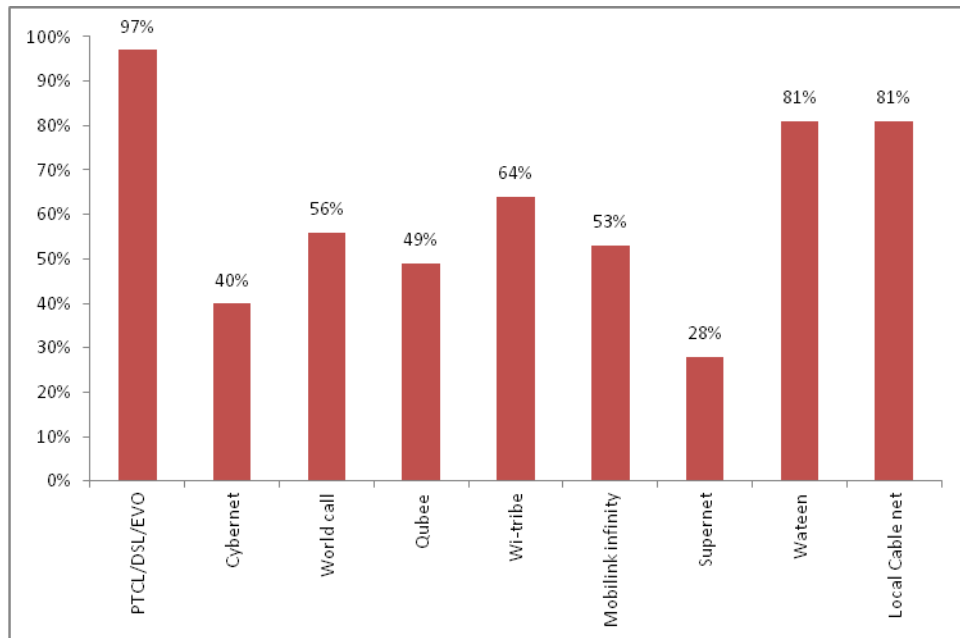
55% of internet users access the internet at home via a fixed line (broadband/DSL). 19% of the users use a cable net connection.

Table 2.16: Internet usage: types of access in household, by income



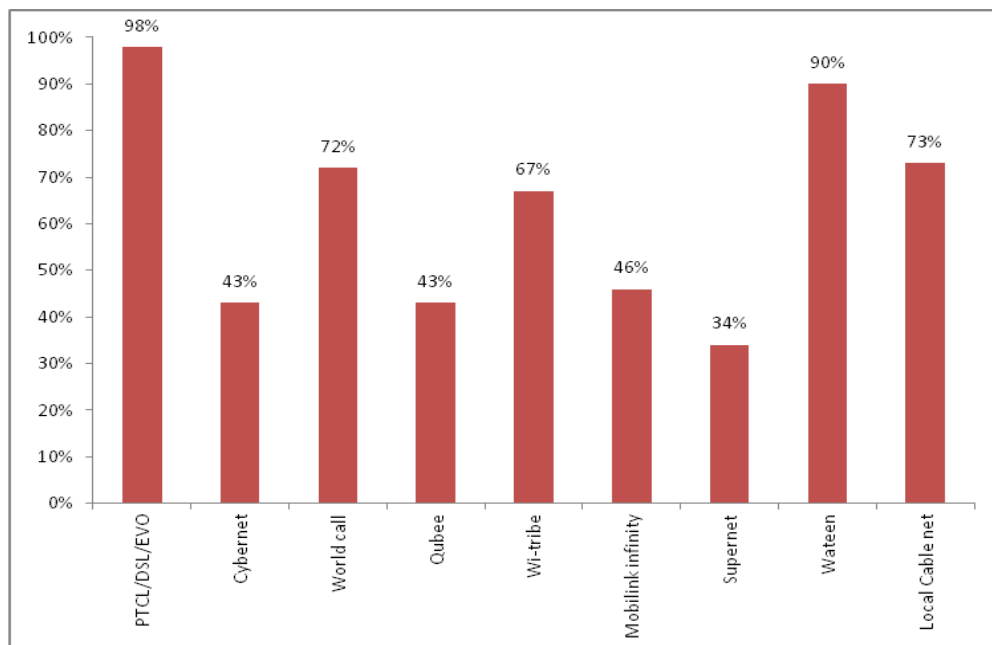
The income groups were using multiple devices to access the internet. The middle (57%) and high income groups (55%) were mostly dependent on fixed line Broadband or DSL. Cable net and Wireless connections are more common among both lower and higher income categories. Mobile phone and Wi-Max were the least used types of internet access.

Table 2.17: ISPs available to respondents, overall



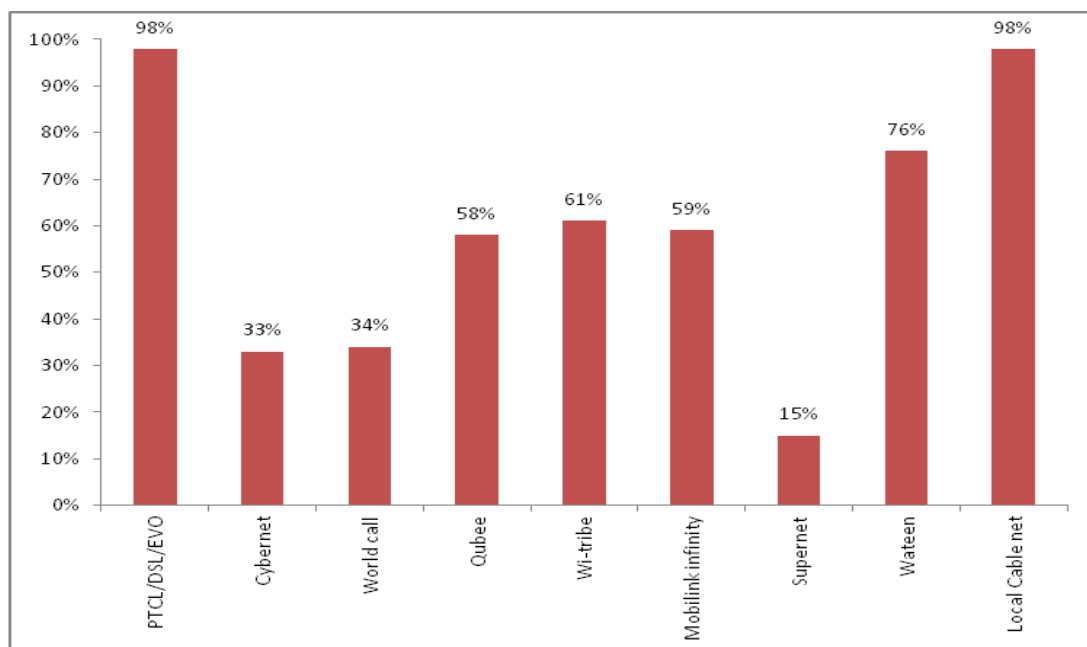
97% of the respondents used PTCL (97%), followed by Wateen and Local cable net providers (81%).

Table 2.18: ISPs available to respondents in Punjab



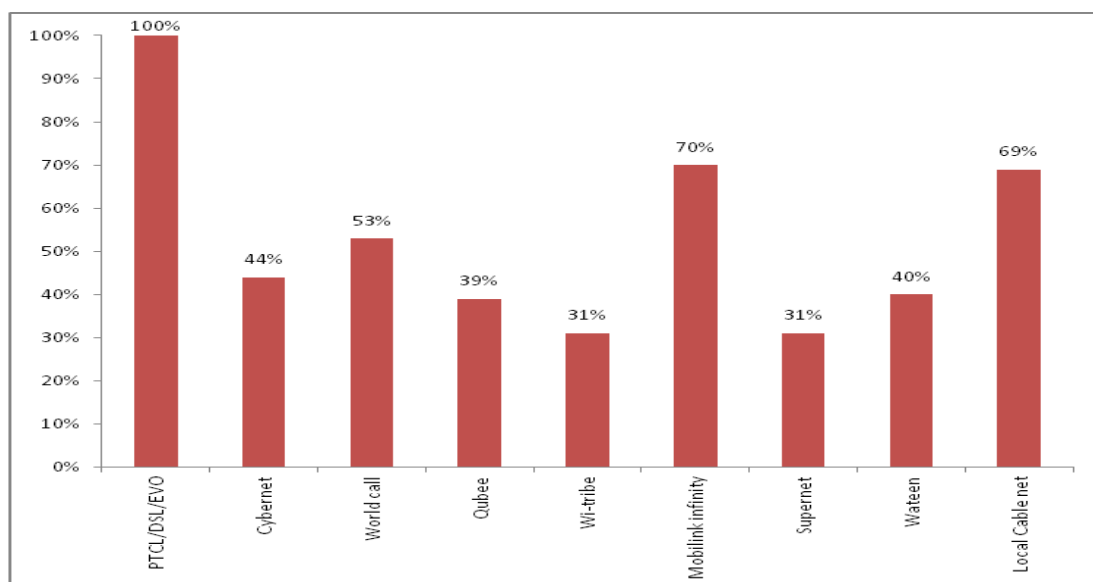
In the Punjab province, besides PTCL, the other top three ISPs were Wateen (90%), cable net (73%) and World Call (72%).

Table 2.19: ISPs available to respondents in Sindh



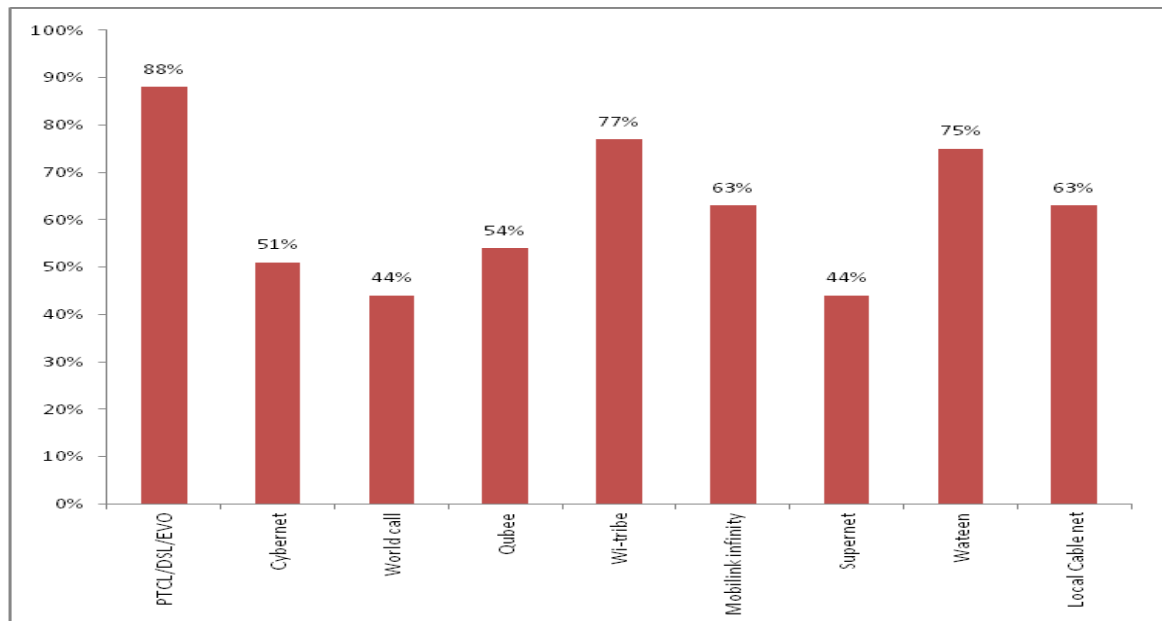
PTCL and local cable ISPs offer equal coverage in Sindh (98%), followed by Wateen (76%). The other prominent available ISPs were Wi-tribe (61%) and Qubee (58%).

Table 2.20: ISPs available to respondents in Baluchistan



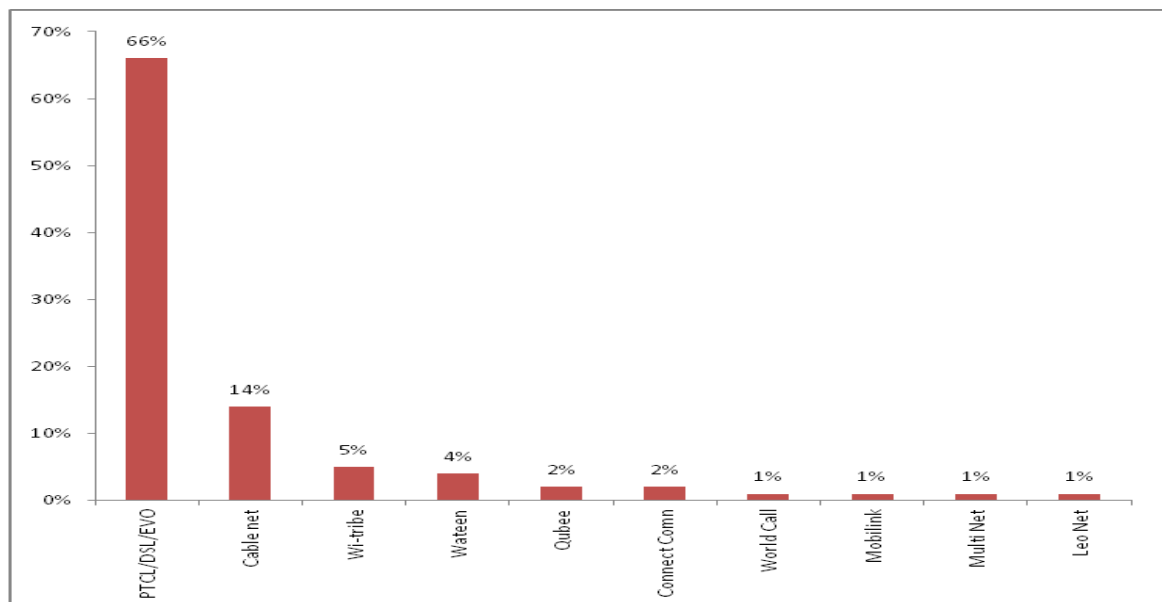
Users of Baluchistan perceived Mobilink Infinity (70%) to be the second-most widely available ISP after PTCL, followed by local cable providers (69%).

Table 2.21: ISPs available to respondents in KPK



Wi-tribe (77%) and Wateen (75%) are almost equally available in urban area of KPK province. Mobilink Infinity (63%) is also available.

Table 2.22: ISPs used by respondents at home



66% of the respondents use PTCL (66%) followed by cable net (14%).

Table 2.23: ISPs used at home by respondents – Punjab

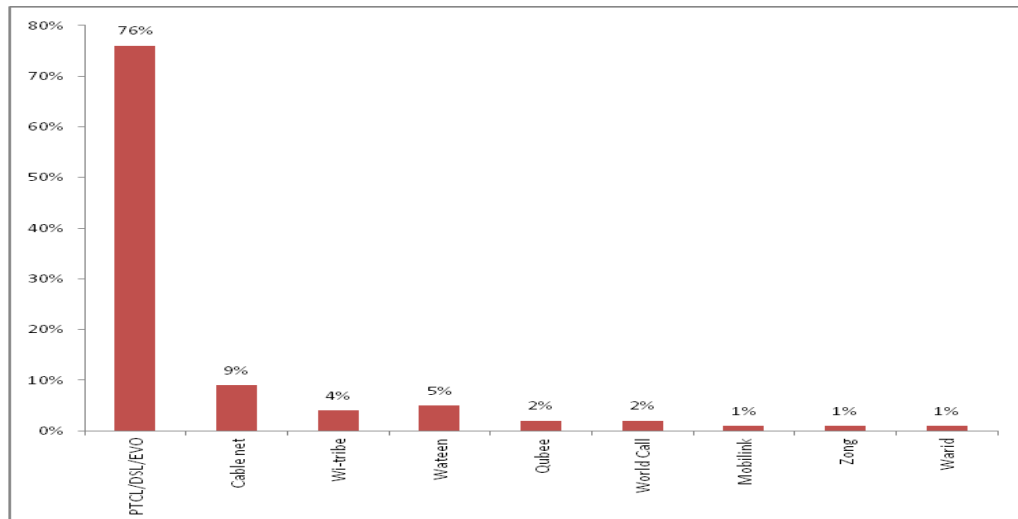


Table 2.24: ISPs used at home by respondents – Sindh

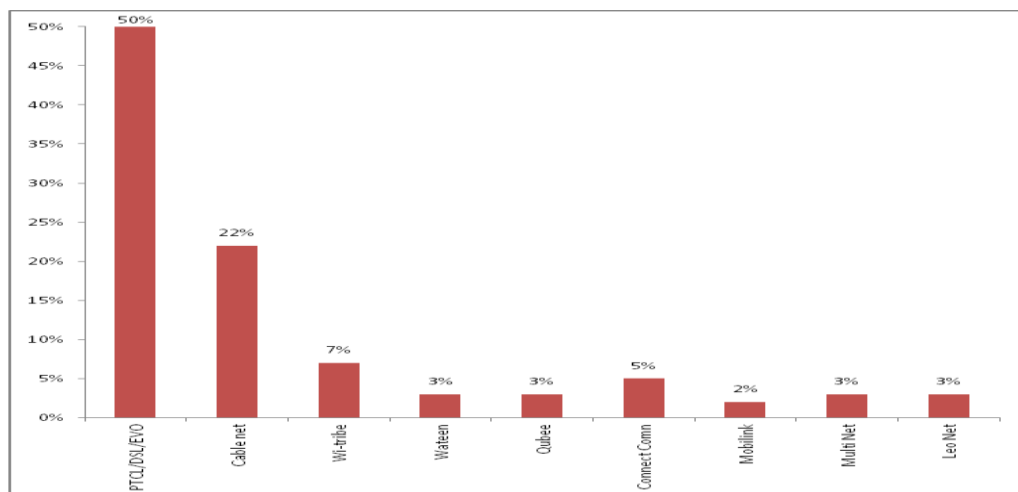


Table 2.25: ISPs used at home by respondents – Baluchistan

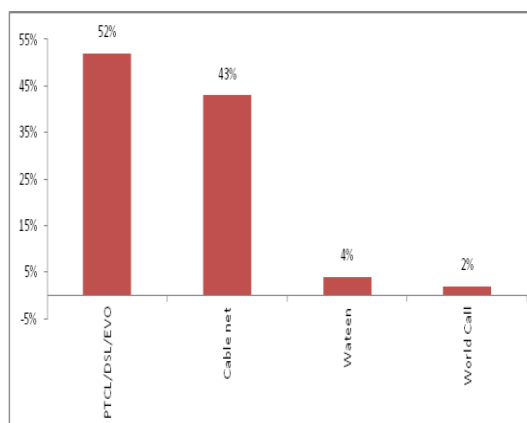
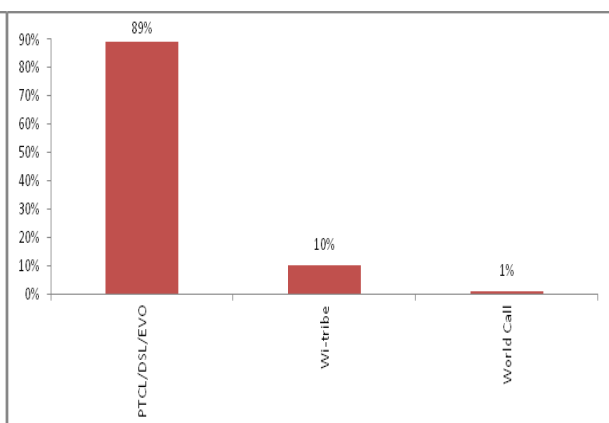
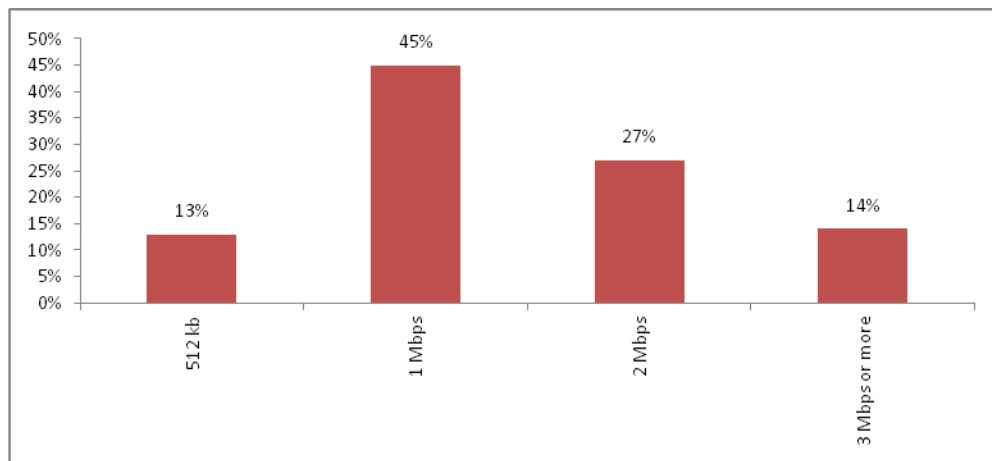


Table 2.26: ISPs used at home by respondents – KPK



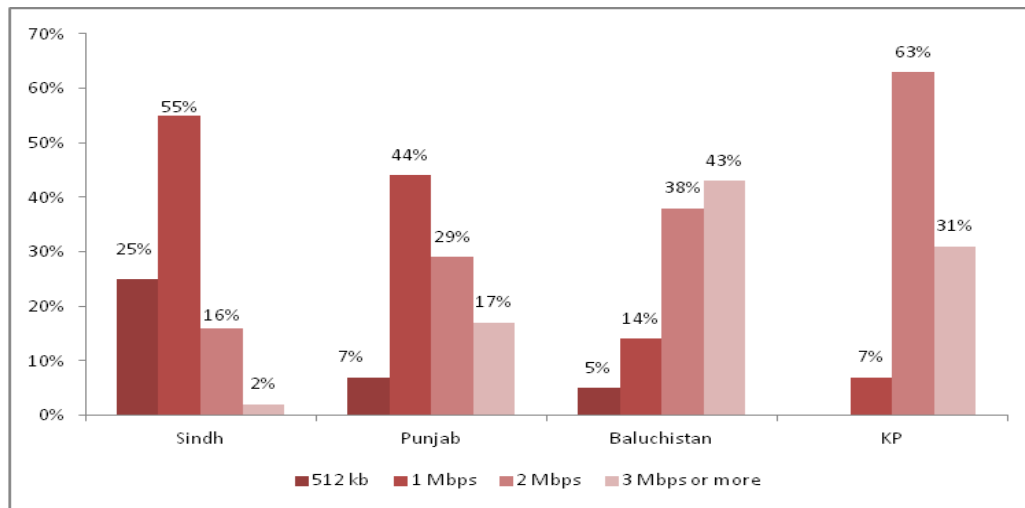
PTCL got the highest usage share across all provinces but cable net is also widely used in each province except for KPK [Fig. 2.23-2.36]. In Punjab, no other brand has significant share except for local cable net access [Fig. 2.23]

Table 2.27: Internet access speed used by respondents, overall



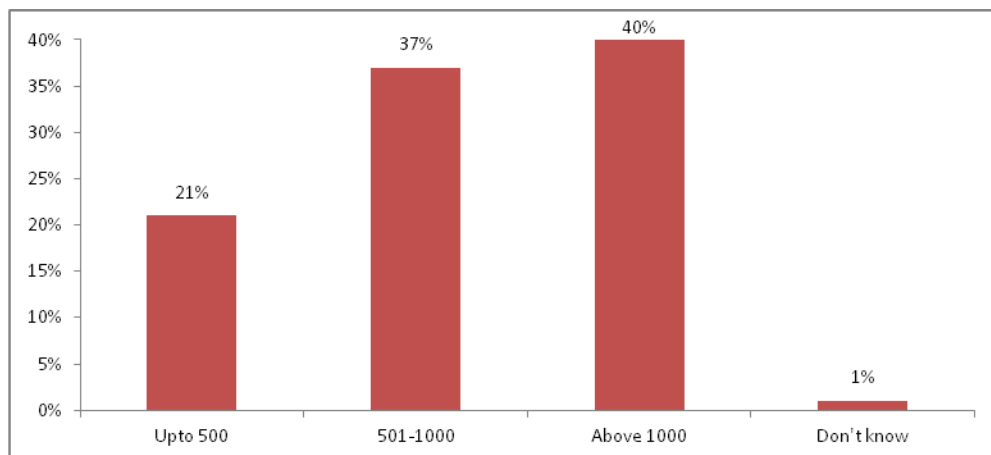
45% of internet users connect through a 1 Mbps connection, where as 27% claim to receive a 2 Mbps connection.

Table 2.28: Internet access speed used at home, by province



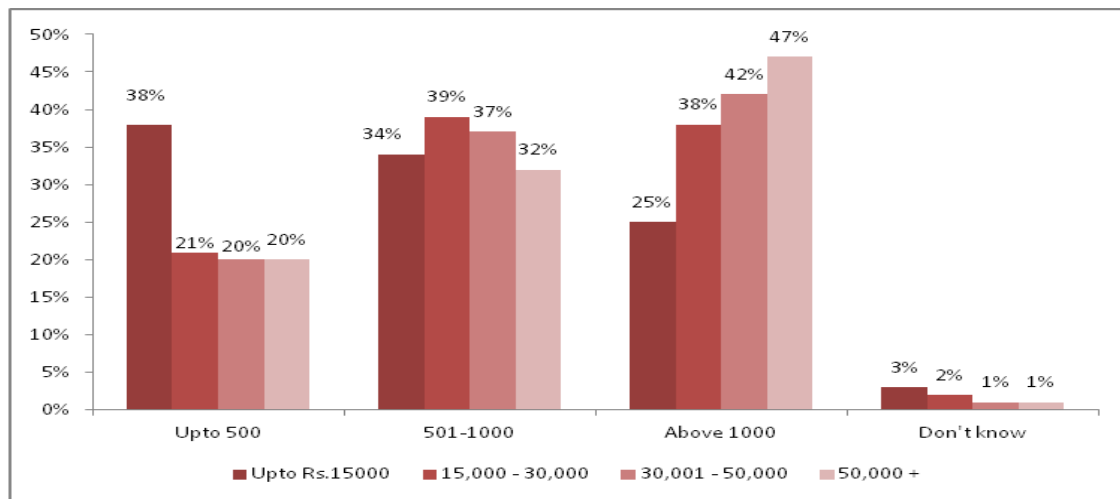
Users at home from Sindh province were mostly accessing the speed up to 1Mbps and some other were using 2Mbps or more. In Punjab the common accessible speed was 1-2 Mbps followed by 3 Mbps +. Interestingly, KPK users at home perceived to be using the highest internet among all provinces. Less than two third were using 2 Mbps internet connection while other 31% using more than 3Mbps. There were very few users in KPK who access the speed of 1Mbps.

Table 2.29: Monthly expense of internet access, overall (Expense in PKR)



More than three fourth (77%) of the users pay PKR 500+ for their monthly internet connection.

2.30: Monthly expense of internet access, by income (Expense in PKR)



As the monthly fees increases it is directly related to the monthly HH income. The low income groups accessed the internet at low rates i.e. below Rs. 500 (38%), whereas higher income groups paid more than Rs. 1000 for each month (47%).

Usage (time)

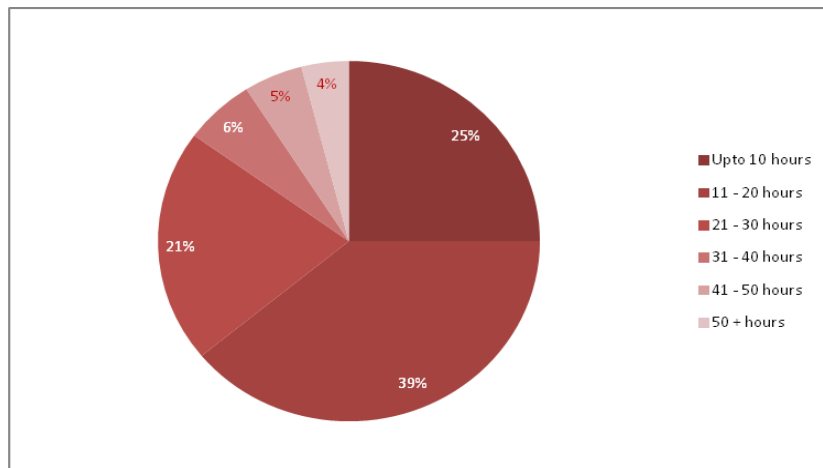
About a third of all respondents spent at least 3 hours a day on average online. This was skewed somewhat in favour of education levels, but daily usage was common across the board by gender (92% men, 80% women). In terms of occupation, students and the employed used online access most frequently (daily), with housewives a little less often. Regular usage did not seem to be much affected by language considerations, possibly because of the importance (as reported, essential) given to Internet usage. A fifth of all respondents spend as much as four hours online daily, with a tenth being heavy users (over 6 hours a day). On closer examination, women were slightly less likely to be heavy users, with about 20 % spending upwards of four hours a day compared with about 40% of men.

Examined by income levels, nearly half of the most affluent respondents are heavy users, compared with a third of the least affluent. Retirees are the least likely to be heavy users (almost none), compared with students and the employed, nearly half in each category averaging over four hours a day. Of the educated, the higher the education levels, the more likely to spend a greater amount of time online (roughly 60% of graduates and post graduates using the Net for over 4 hours a day).

90 % of all users said they were likely to be online at least once a day, of which men were slightly more likely (92%) to report this than women (80%), and amongst women, only 19% of housewives reported such daily access as likely.

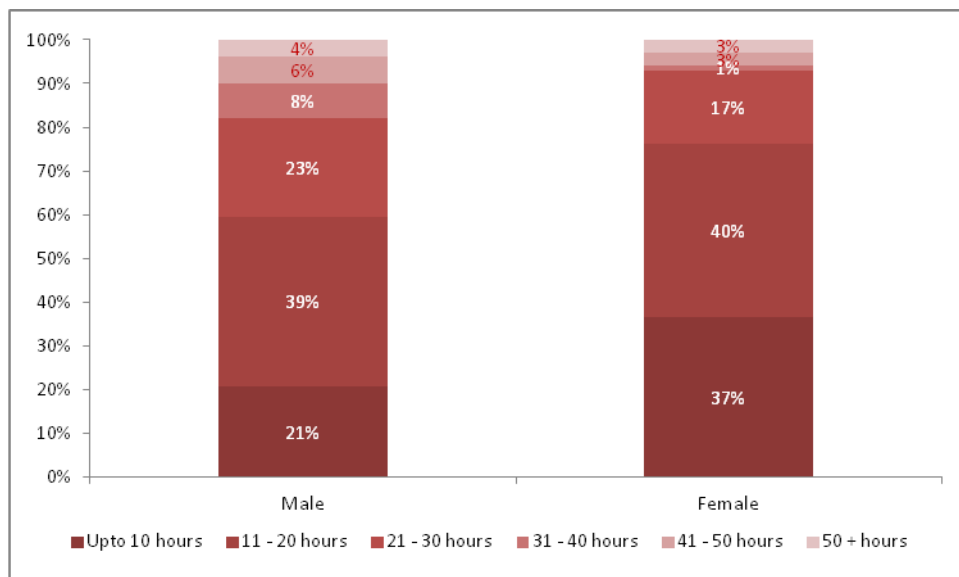
Net usage was reported to concentrate between 8 pm and midnight, reinforcing the perception that most reported usage is from the home. The detailed figures of reported daily usage will be useful for further analysis by demographic, as is the comparative daily use of time using various media (reading, television, radio) and socialising with friends, which is presented in the report with reported figures for weekday and weekend usage.

Table 3.1: Overall number of hours spent online in a week



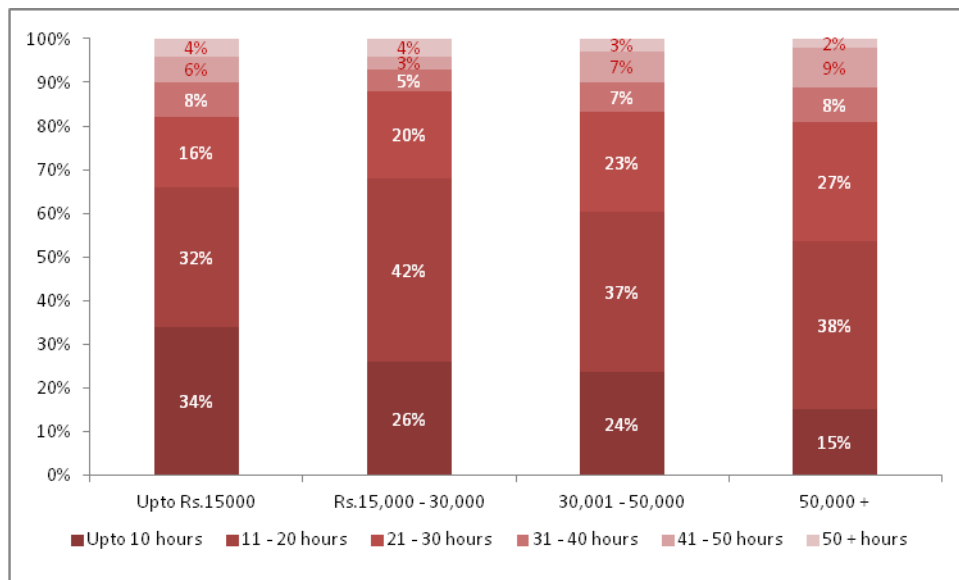
More than one third of the Internet users (39%) spend 11-20 hours online in a week. 25% use it for up to 10 hours whereas another 21% spend about 21-40 hours online weekly. The heavy users (6+ hours of daily usage) were 10% of the users segment.

Table 3.2: Hours spent online in a week, by gender



Both genders mostly spend 11-20 hours online weekly. 37% of females only spend 10 hours or less online whereas 31% of males spend 21-40 hours online weekly.

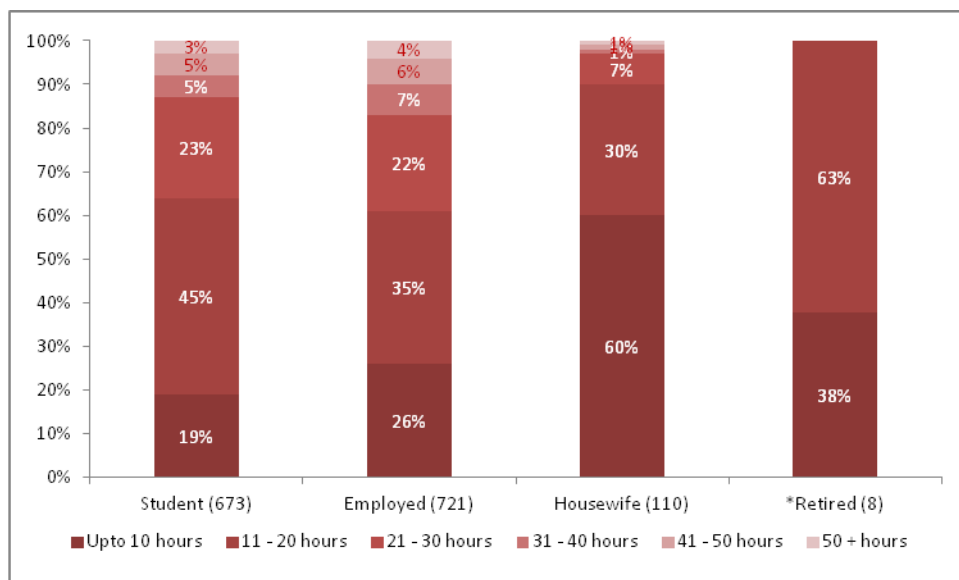
Table 3.3: Hours spent online in a week, by income



For less than 10 hours usage, share of low income group was high (34%). High income groups tend to spend more time online - 27% of those earning Rs. 50,000 and more spend up to 30 hours online weekly.

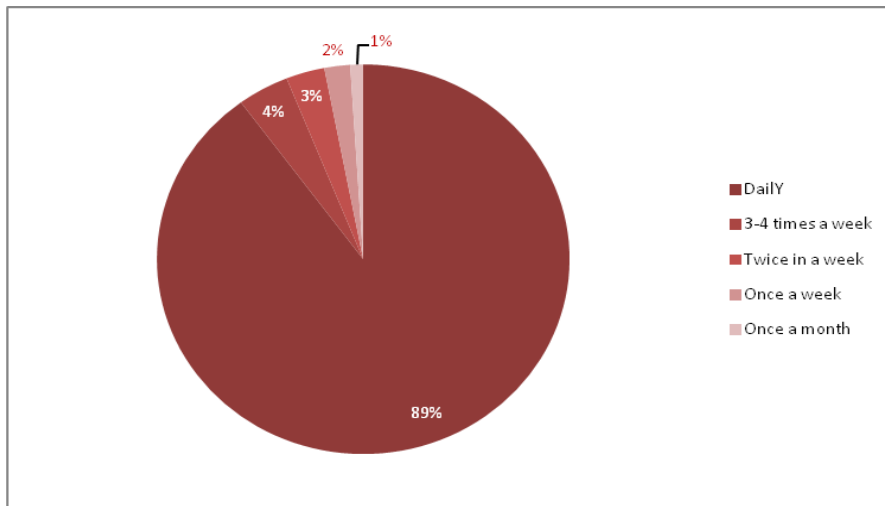
Table 3.4: Hours spent online in a week, by life stage

***Caution: Small base. Not relevant for statistical significant analysis**



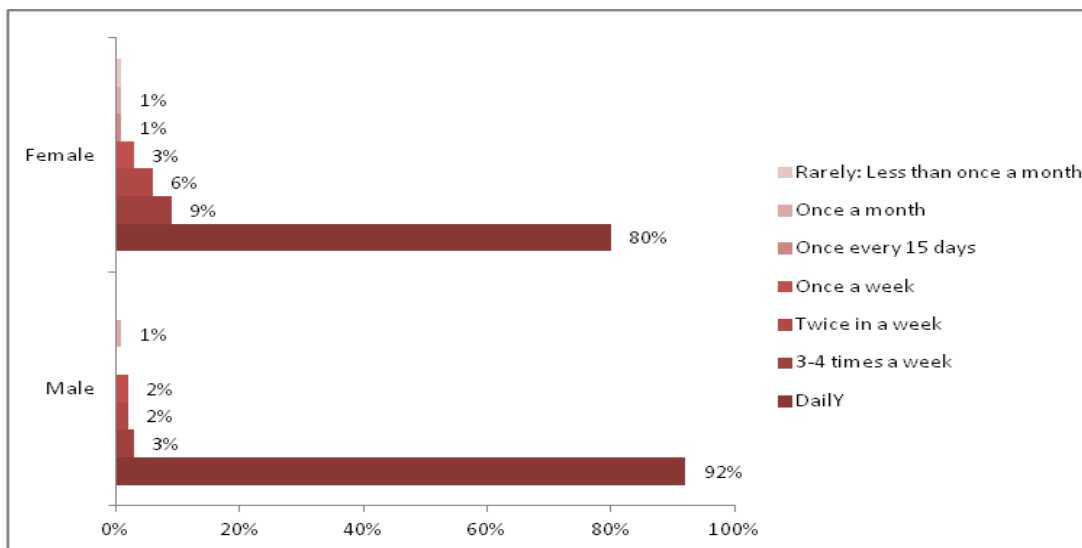
Housewives (60%) are mostly online for up to 10 hours a week, whereas retired persons are mostly online for 11-20 hours weekly. Students were the largest group who used internet for 20 hours (45%). However, for the longest online hours per week (20-50 hours and 50 + hours) students and employed users shared equal participation.

Table 3.5: Overall frequency of internet usage



Most Internet users connect to the internet daily (89%).

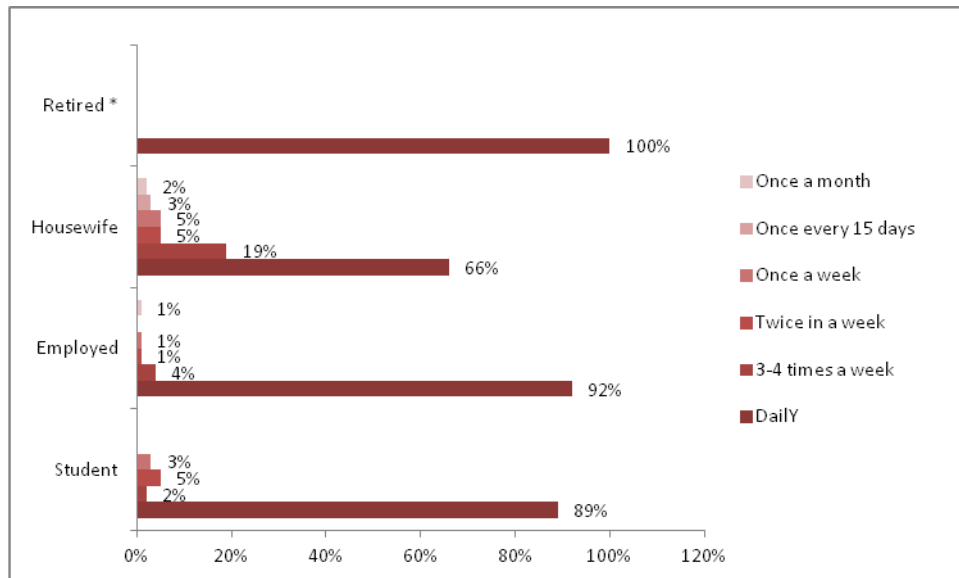
Table 3.6: Frequency of internet usage, by gender



Although both genders use the internet on a daily basis but males were more regular as compared to females (92%).

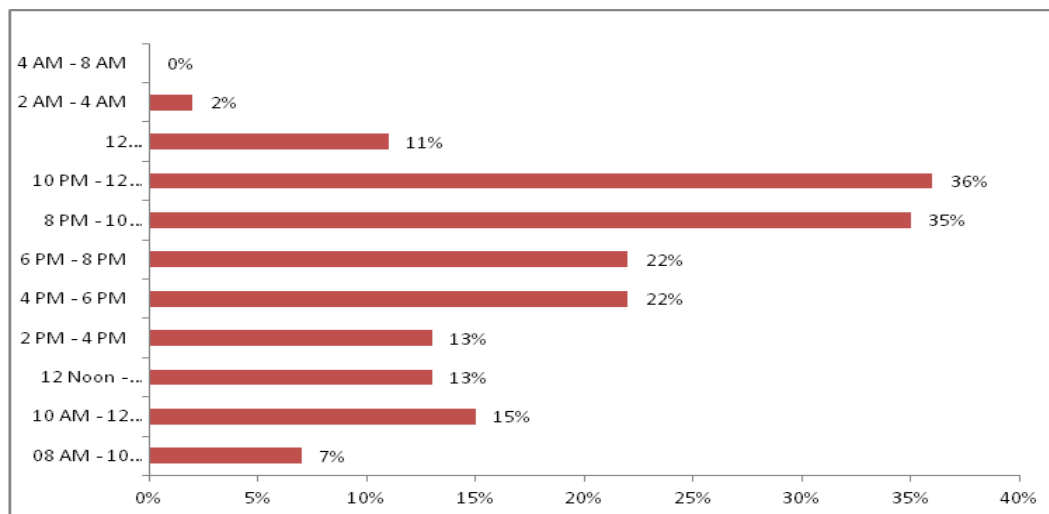
Table 3.7: Frequency of internet usage, by life stage

*Caution: Small base. Not relevant for statistical significant analysis



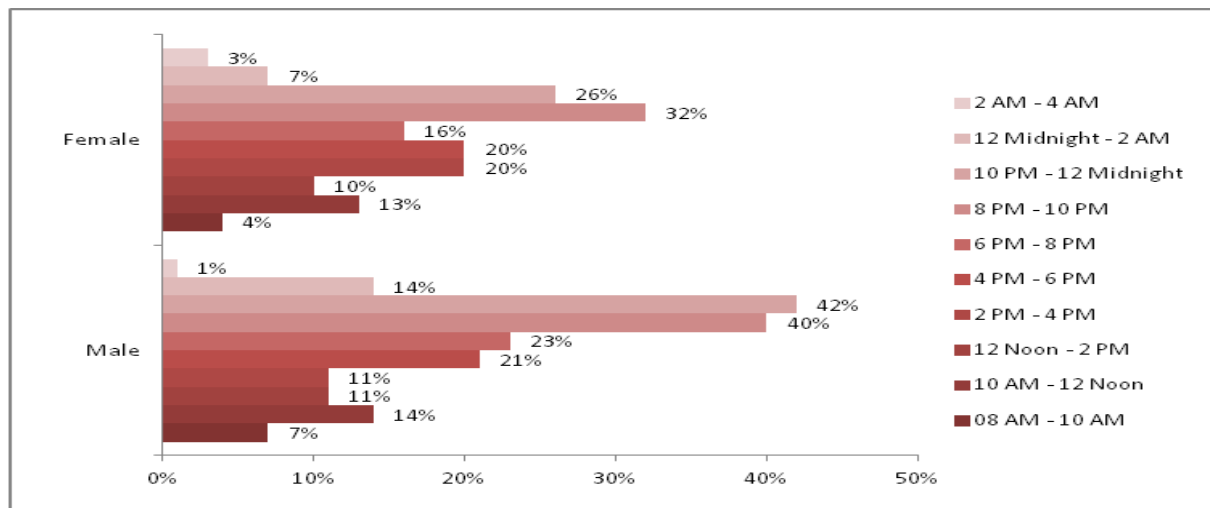
Housewives were the only life-stage group to report less than 80% of daily internet usage: 19% of housewives only use the internet 3-4 times a week.

Table 3.8: Most likely time slots to be online, overall



Overall, the two most common timeslots to be online were 8 pm – 10 pm and 10 pm – midnight.

Table 3.9: Most likely time slots to be online, by gender



Females are much more likely to be online in the afternoon vs. males: up to 20% of female respondents reported being online between 2 pm and 4 pm vs. only 11% of males. Males are more likely to be online from 10 pm to midnight – 42% vs. only 26% of females.

Table 3.10: Most likely time slots for students to be online

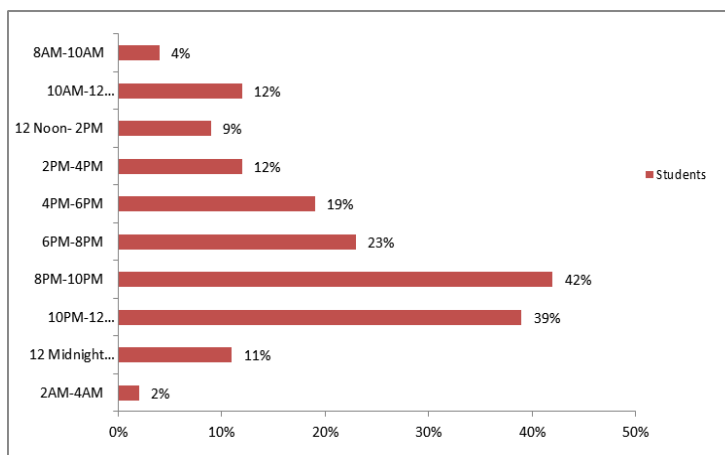


Table 3.11: Most likely time slots for employed respondents to be online

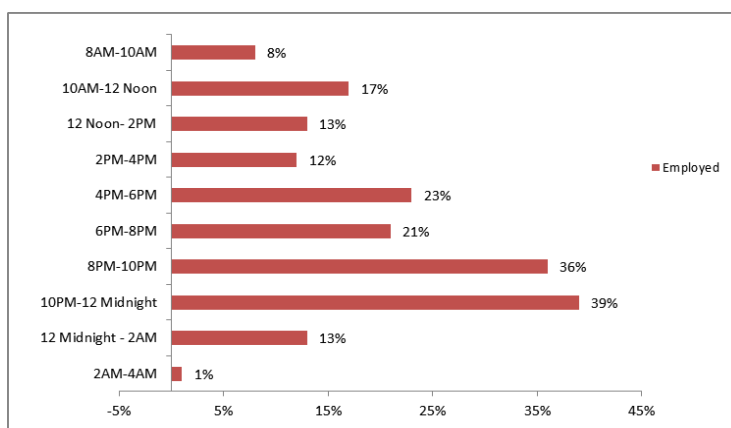
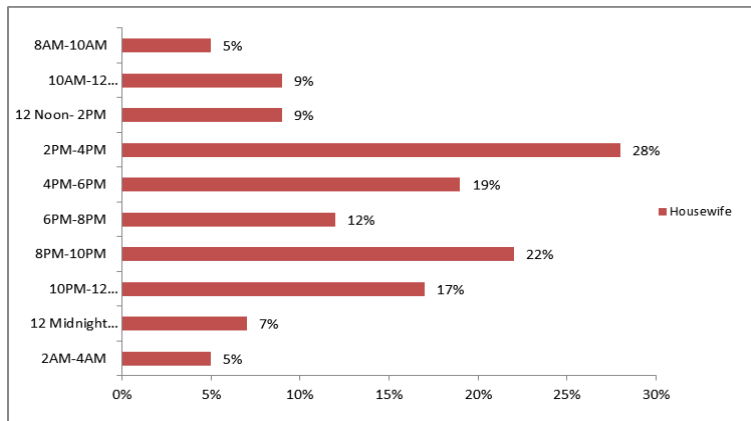


Table 3.12: Most likely time slots for housewives to be online



Students dominated the time slot of 8pm-10 pm (42%) (Fig. 3.10), while housewives utilized the afternoon slot 2pm-4pm (28%) [Fig.3.12]. The 10 pm to midnight slot was equally dominated by students and the employed segment [Fig. 3.10 & Fig. 3.11].

Table 3.13a: Time spent online by males - weekend vs weekday daily average

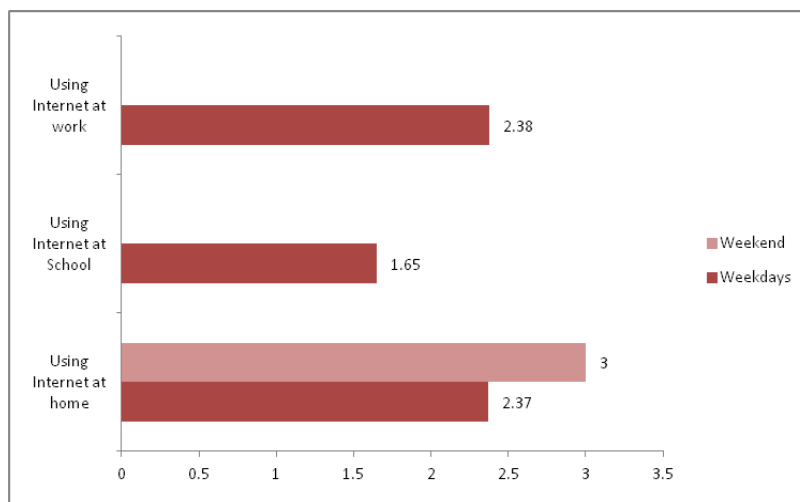


Table 3.13b: Time spent in other activities by males – weekend vs weekday daily average

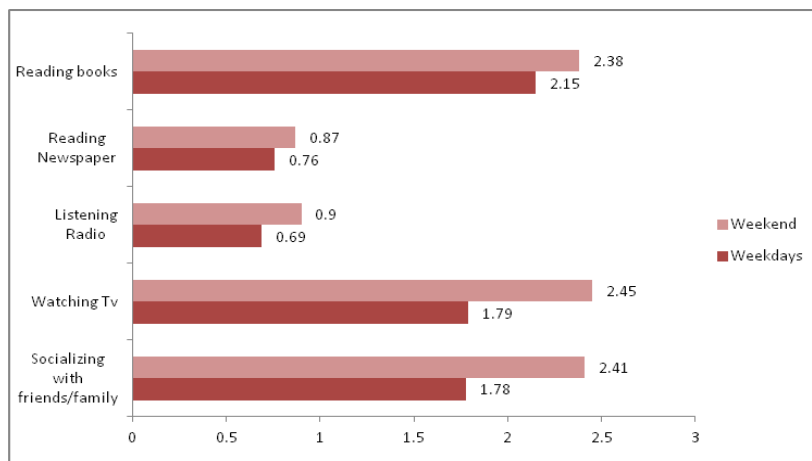


Table 3.14a: Time spent online by females - weekend vs weekday daily average

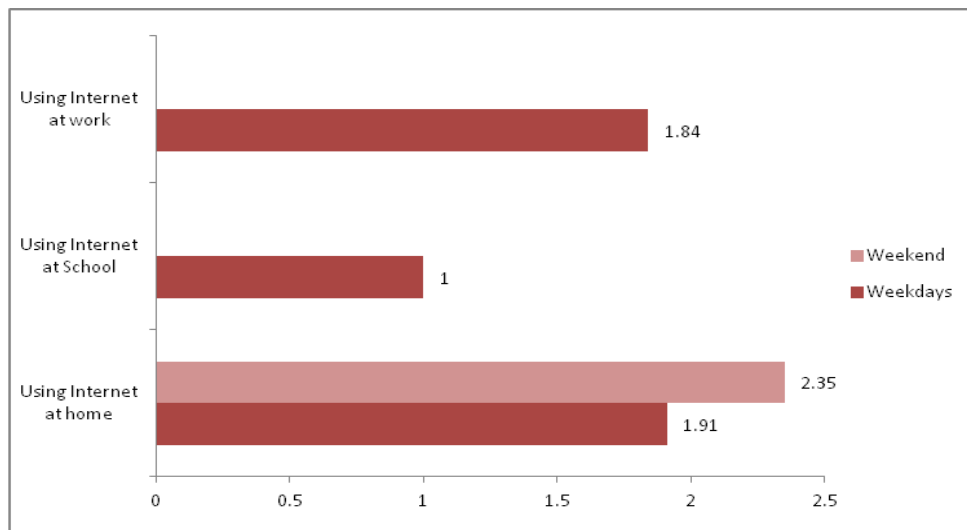
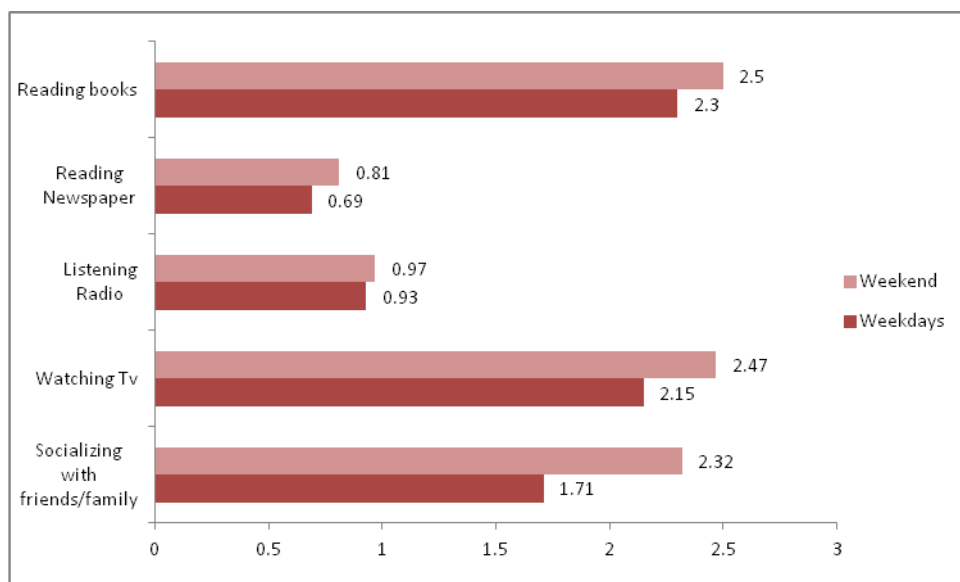


Table. 3.14b: Time spent in other activities by females – weekend vs weekday daily average



The responses were unanimous when males were asked for hours spent online during weekdays and weekends. [Fig. 3.13a & Fig. 3.13b]. Male users spent more time on internet than any other activities as compared to females, whereas females are more likely to watch TV both on weekend and weekdays [Fig. 3.14b]. Both genders were also fond of socializing and reading books [Fig. 3.13b & Fig. 3.14b].

Table 3.15a: Time spent online by students – weekend vs weekday daily average

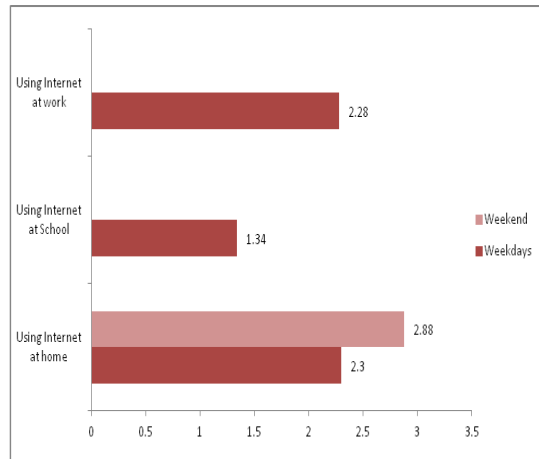
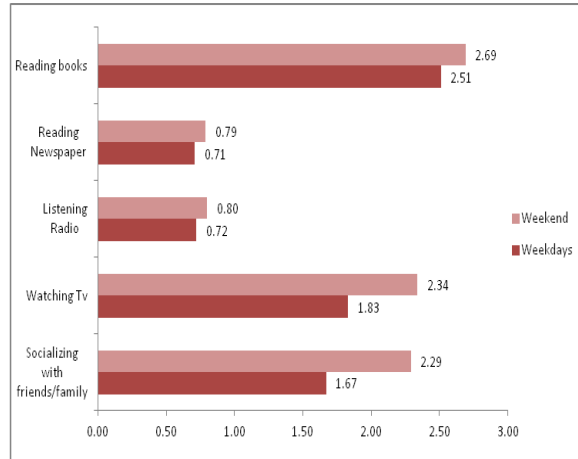


Table 3.15b: Time spent in other activities by students – weekend vs weekday daily average



Reading books was the most important activity for the students as they reported 2 and a half hours in a week [Fig. 3.15b]. They also spend less than 3 hours in reading books on weekends. Besides reading, they spend their time on using internet at home (2.8+ hours) [Fig. 3.15a]. In their leisure time, they liked to watch TV or socializing with friends/family.

Table 3.16a: Time spent online by employed respondents- weekend vs weekday daily average

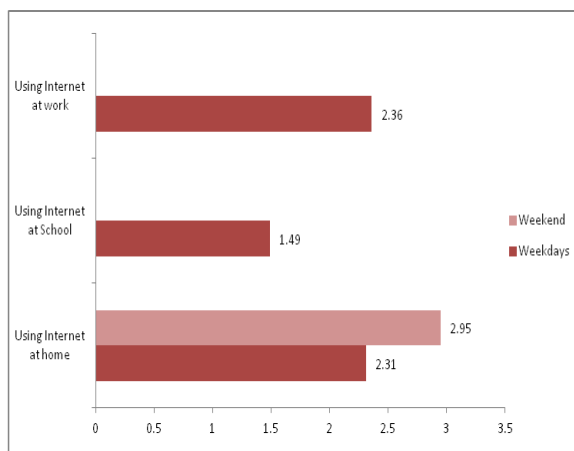
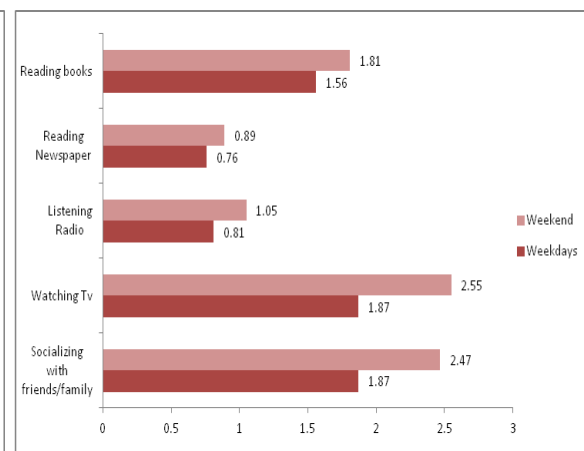


Table 3.16b: Time spent in other activities by employed respondents – weekend vs weekday daily average



The employed persons spent much more time on Internet as compared to any other activity [Fig. 3.16a]. They also kept a balance in socializing and watching TV (1.87 hours each) [Fig. 3.16b]. Using internet was the top most activity on weekends as they remain online for about 3 hours.

Table 3.17a: Time spent online by housewives - weekend vs weekday daily average

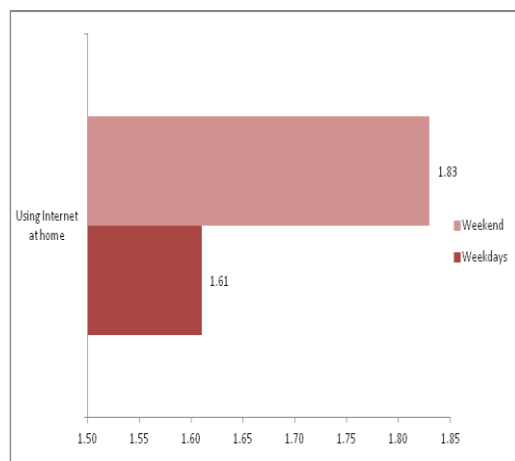
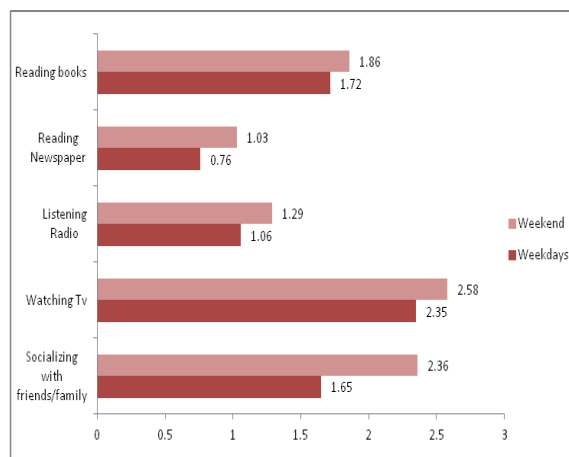
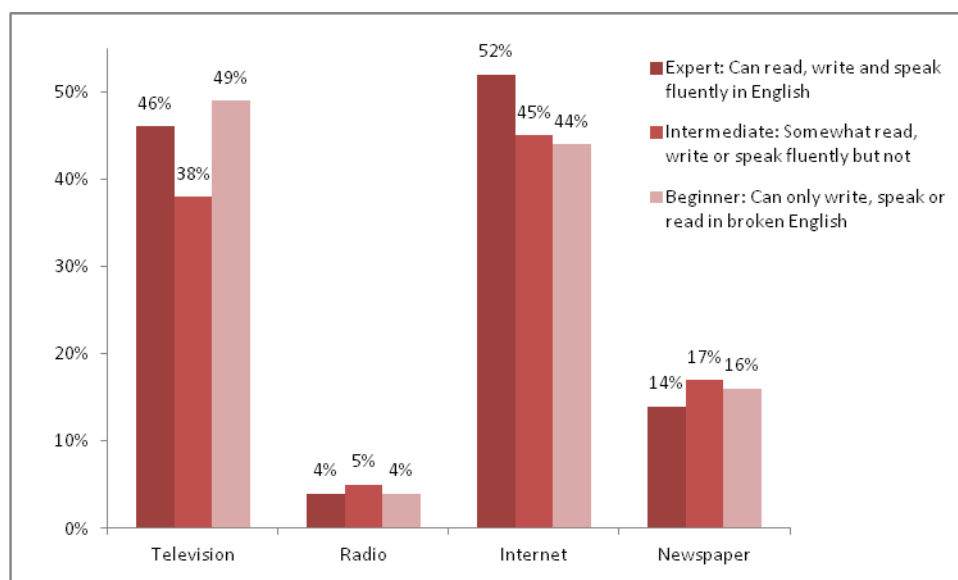


Table 3.17b: Time spent in other activities by housewives – weekend vs weekday daily average



The employed persons spent much more time on Internet as compared to any other activity. They also kept a balance in socializing and watching TV (1.87 hours each). Using internet was the top most activity on weekends as they remain online for about 3 hours [Fig. 3.17a].

Table 3.18: Percentage of respondents identifying types of media as “essential” entertainment source, by language proficiency



The experts (52%) who were fluent in English gave the highest importance ratings to the internet when they look for information, whereas intermediate and beginners almost got equal share in giving importance ratings to internet (45%). Beginners in English rated TV as the most important source of information surpassing the internet.

Usage (purpose)

News searches were reported as the most common use for the Internet, followed by a range of personal interest search topics, and finally, sports. The usage of Google search was reported by nearly 90% of all users.

Within the category of news, nearly 60% of users reported that they read the news through newspapers as well as the Net, and as many as 10% reported using the Net only. Aside from news and sports (search being used regularly for finding items on news as well as other topics of personal interest), academic subjects, healthcare and local information were the most popular, followed by jokes and cartoons.

When analysing the responses in greater detail, it can be seen that the frequency pattern is somewhat different, as news searches are not anywhere as frequent as the broad category of items of personal interest. Within some categories of reported usage (work information, travel), there were users, nearly half of all users, in fact, who had never even searched once.

Gender differences also show up sharply in this analysis, with wide gaps in categories such as sports (85% men, 48% women), job searches (60% men, 36% women) and news (88% men, 63% women).

Overall, looking at occupation, the employed tend to use the Net most productively, followed by women, who frequently look at cooking and health information, while students often look at academic-related searches.

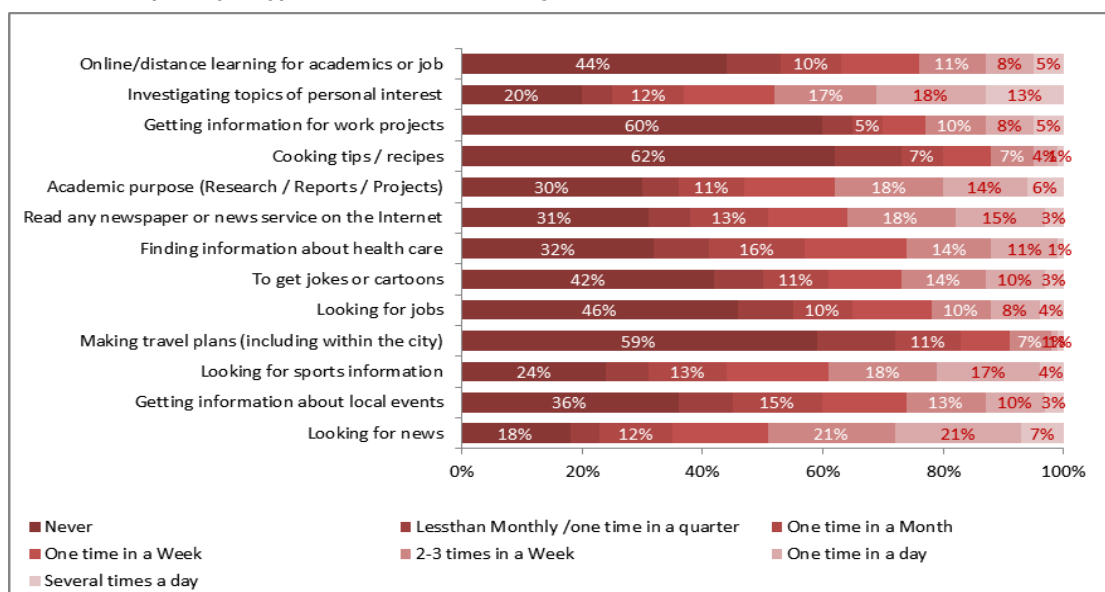
There is one category of online information that compares directly with that available either on television or other offline sources and that is news. We note that accessing news is a practice that occurs uniformly across all income brackets, even considering that the cost of access may affect its frequency somewhat. In terms of normal occupations, the employed tend to access news information most regularly, though, whilst housewives are least likely to do that. Students also report they are less likely to frequent news sources, either online or offline, with close to half avoiding (print) newspapers entirely.

Table 4.1a: Types of information seeking online, overall



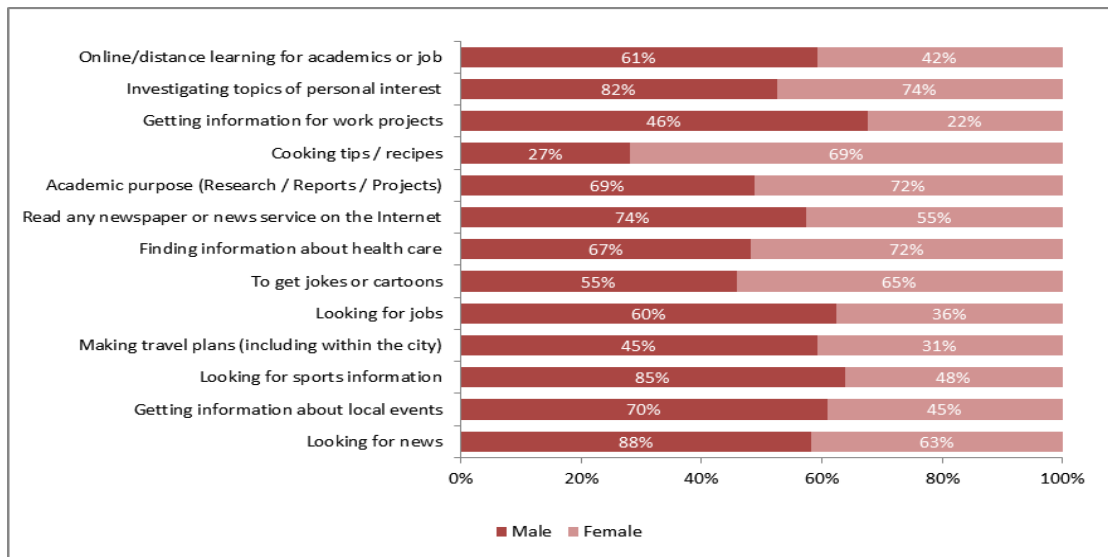
The most popular types of online information seeking were looking for news (82%), searching topics of personal interest (80%) and sports information (75%).

Table 4.1b: Popularity of types of information seeking, overall



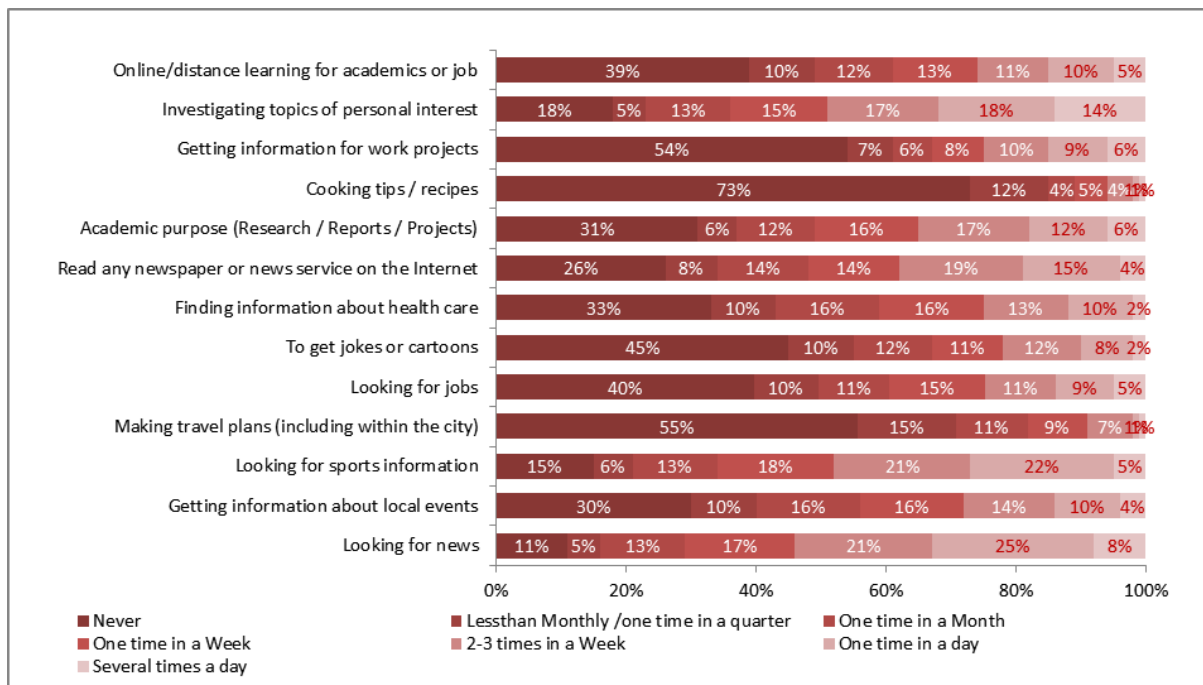
The online information seeking doesn't seem very popular as it was not frequently done in daily routine. However, seeking topic of personal interest (13%) was the only information that was searched several times in a day. News (21%) and sports (17%) information did get some popularity since more users searched for them daily as compared to other types of information. Most popularly searched information on a monthly basis was on health care and local events (16% vs. 15%), while reading newspaper online and academic purpose deemed as weekly activities. Cooking tips (62%), work projects (60%) and travel plans (59%) were the least popular types of information as more than half of respondents never searched for each of them.

Table 4.2a: Types of information seeking online, by gender



Men are more likely to use the internet to get information on news (88%), sports (85%) and personal topics (82%) than women. Women are more health conscious and thus spent more time on it and working on academic reports (72%) followed by cooking recipes (69%) and jokes (65%). The significant gaps found between genders were sports (85% men vs. 48% women), online work projects (46% vs. 22%), job searching (60% vs. 36%), local events and news (88% vs. 63%).

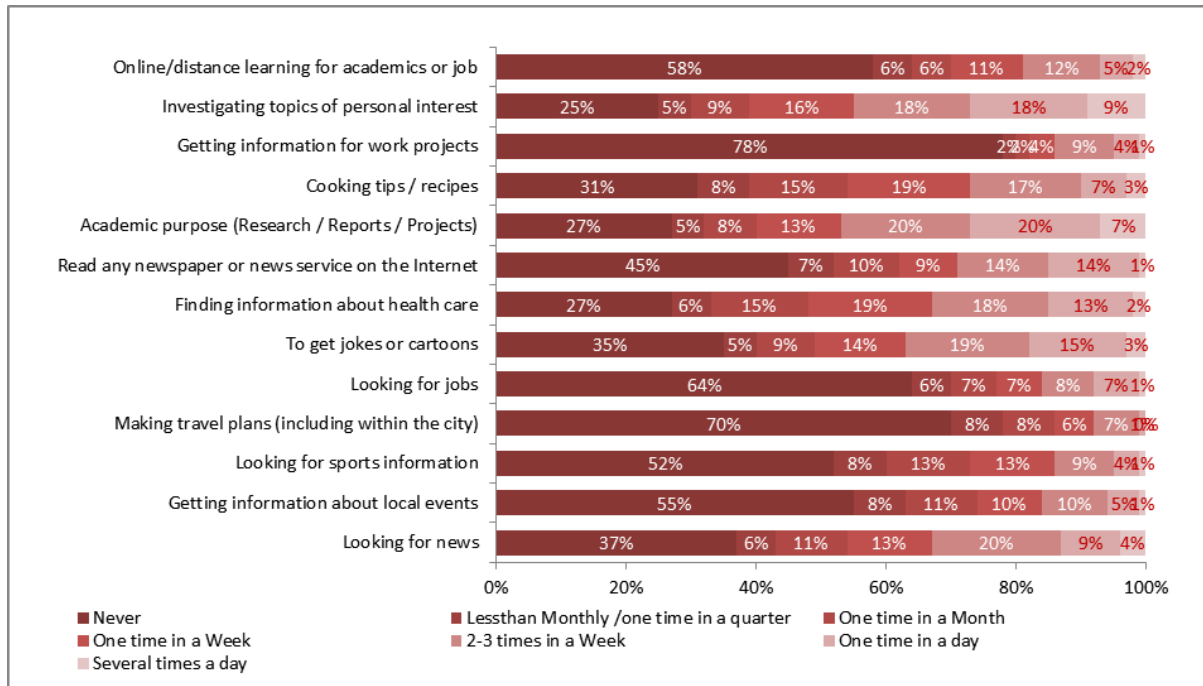
Table 4.2b: Popularity of types of information seeking – male



Within the male segment, personal interest topics were the most popular type of information that they searched several times a day (14%). Individually, news and sports information

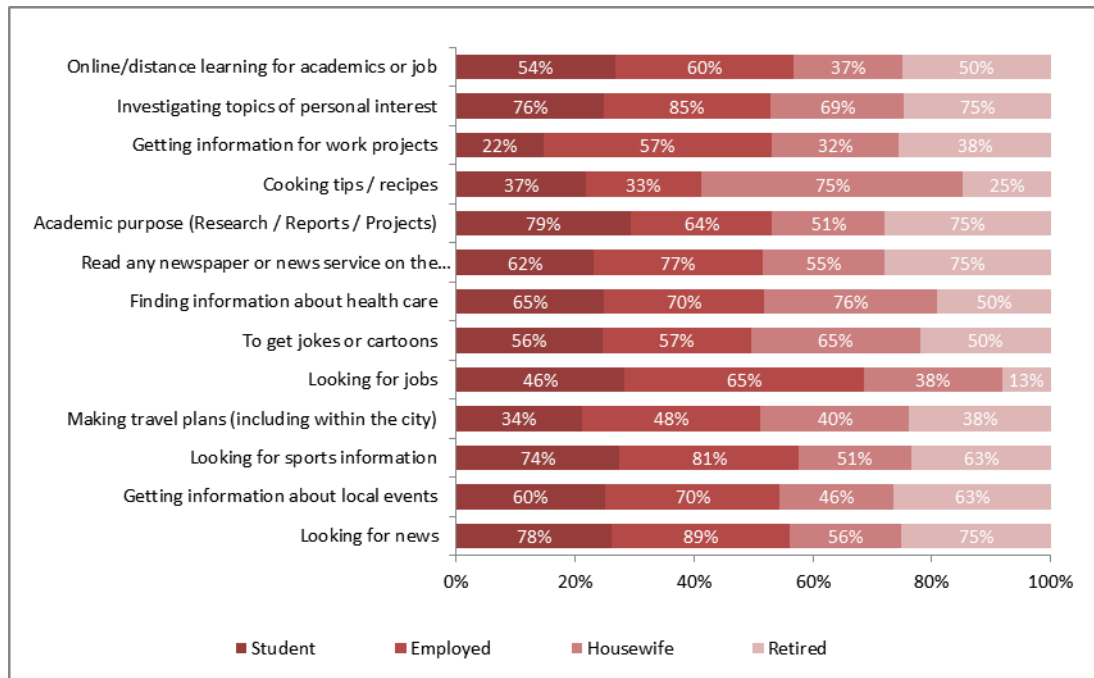
were the most searched information among males as they go for them either on a daily or weekly basis. Men were least interested in making travel plans (55%) and cooking tips (73%) for which they never searched anything online.

Table 4.2c: Popularity of types of information seeking – female



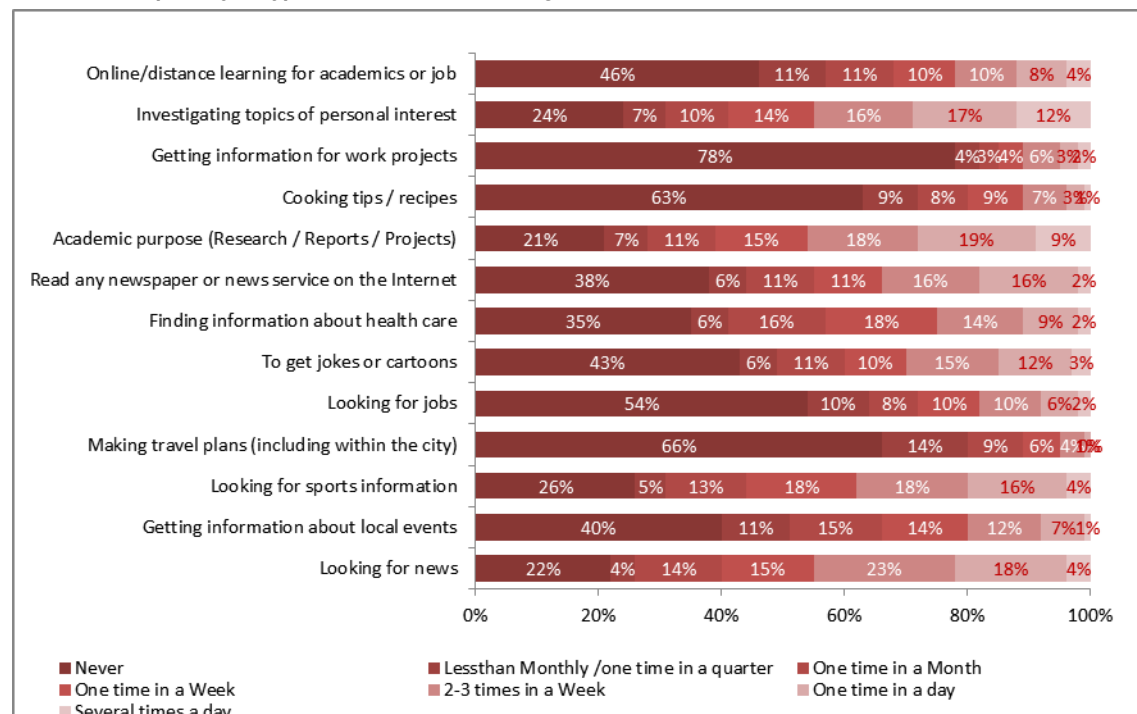
The daily internet surfing for females regarding information seeking was not dominant in category except academic purpose (27%) followed by personal interest topics (18%). Weekly famous types of information were healthcare and cooking recipes (37% vs. 36%). Females were least interested in getting information on work projects (78%), making travel plans (70%) and job searching (64%) as they never looked for them on internet.

Table 4.3a: Types of information seeking online, by life stage



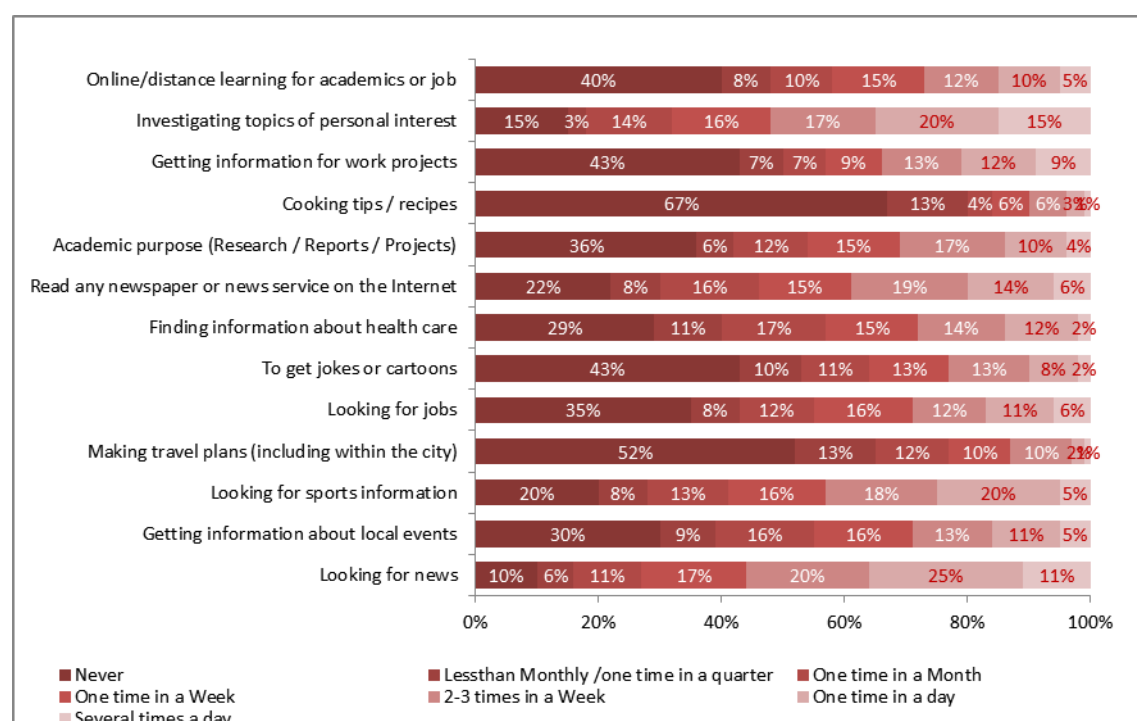
Employed respondents tend to use the internet most widely. They seek information more frequently on news (89%), personal topics (85%), sports (81%) and online news paper (77%), and local events (70%) although these are popular among all other groups also. On the other hand, students continued to use the internet more frequently than the other groups to work on academic projects/reports (79%). Housewives actively looked for health information (76%), cooking recipes (75%) and jokes/cartoons (65%). Travel plans, and work projects were the least used searches by all groups.

Table 4.3b: Popularity of types of information seeking – student



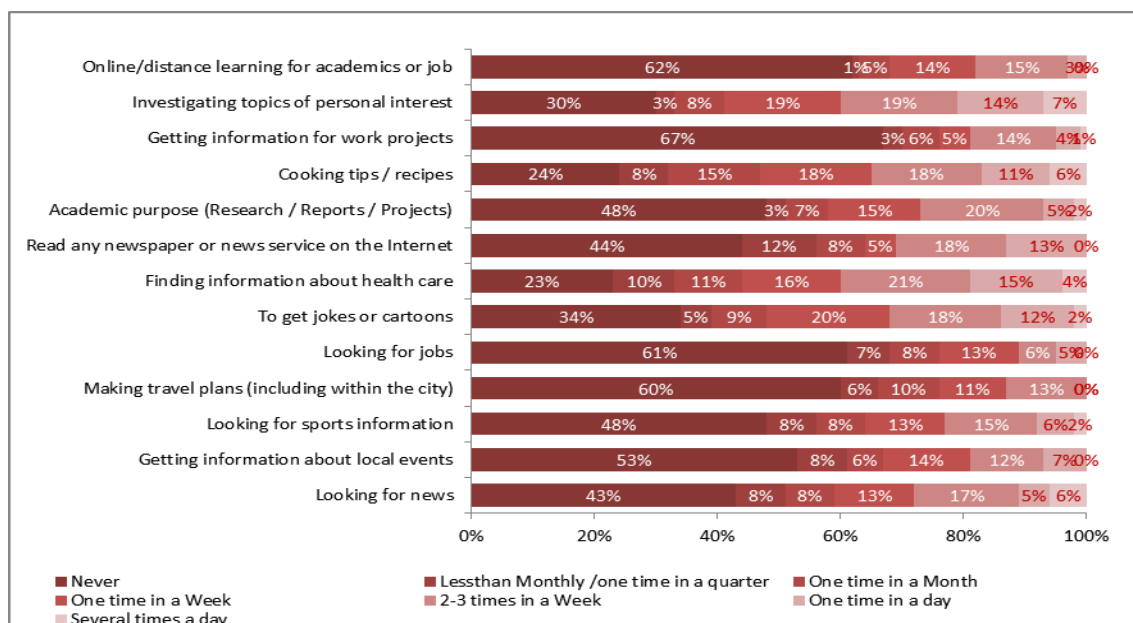
Students remained busy in their academic projects or daily assignments throughout the week, hence it is the most famous type of daily (28%) information seeking activity for this segment. The other famous daily information types were news and sports (22% vs. 20%), whereas healthcare (32%) and personal interests (30%) were deemed as weekly famous information types other than academics.

Table 4.3c: Popularity of types of information seeking – employed



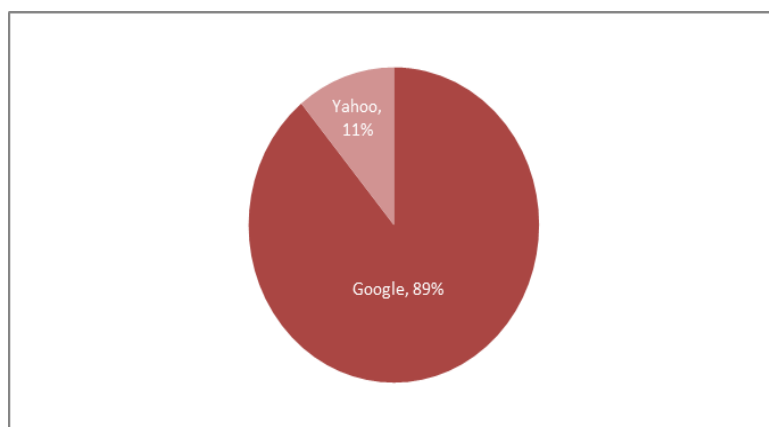
Employed segment actively searched for different types of information on a daily to monthly basis. News 36%) and personal topics (35%) kept them busy during daily routine, whereas they were inclined towards sports and online news service on a weekly basis (34%).

Table 4.3d: Popularity of types of information seeking – housewife



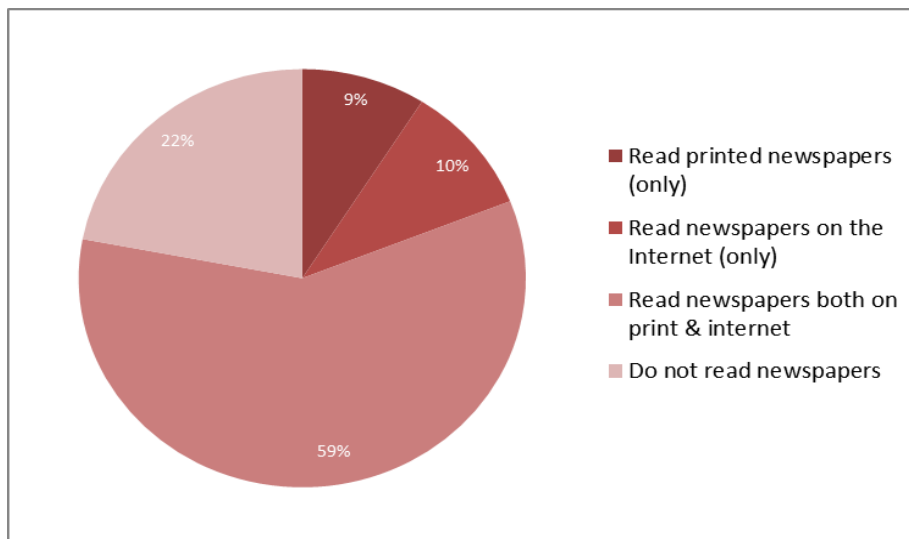
Cooking tips (17%) and healthcare information (19%) were the most popular types of information among housewives especially as a part of their daily routine. Personal topics and jokes/cartoons also keep them engaged on a weekly basis (38%).

Table 4.4: Most commonly used search engine



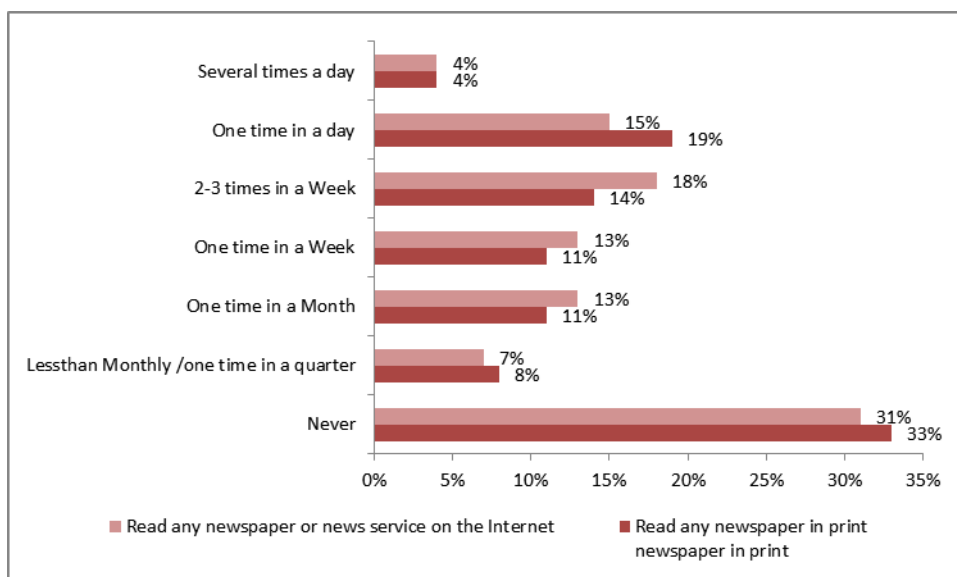
Google (89%) dominated as the top search engine among all users, followed by Yahoo (11%).

Table 4.5: Overall newspaper readership (online vs offline)



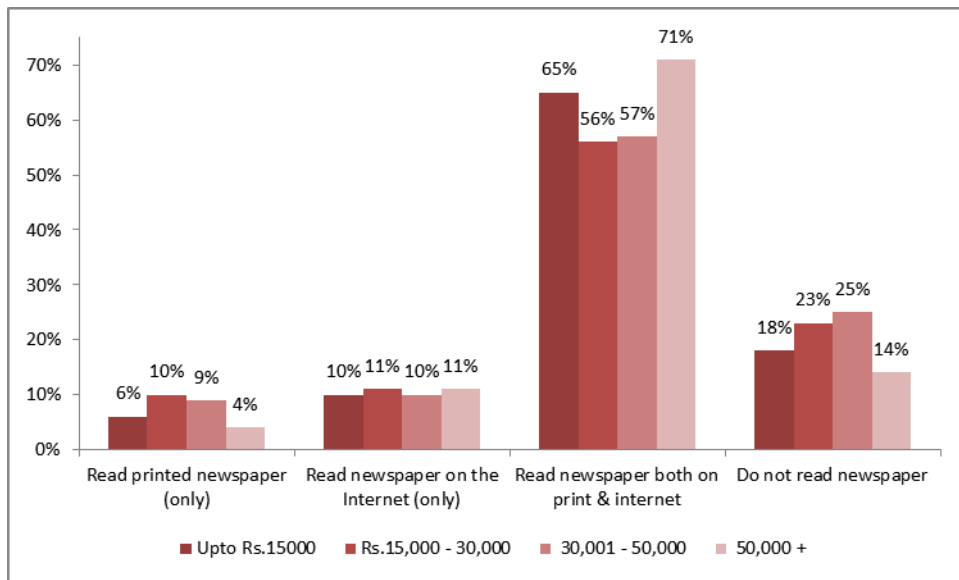
More than half of the internet users (59%) read newspapers both online and offline. However, reading newspaper exclusively on either print or internet was low (10% online vs. 9% offline). Less than one fourth of the users do not read newspapers at all.

Table 4.6: Overall frequency of newspaper readership (online vs offline)



Only 4% of the users read newspaper several times a day either offline or online. There is no significant difference observed in frequencies of readership online vs. offline. About one third of the respondents never read newspaper offline and 31% didn't use online service for reading newspaper.

Table 4.7a: Newspaper readership (online vs offline), by income



The online readership didn't vary significantly among the various income groups. A surprising majority of low income group users (65%) read newspapers both in print and online.

Table 4.7b: Frequency of newspaper readership (online vs offline) – income up to PKR 15,000

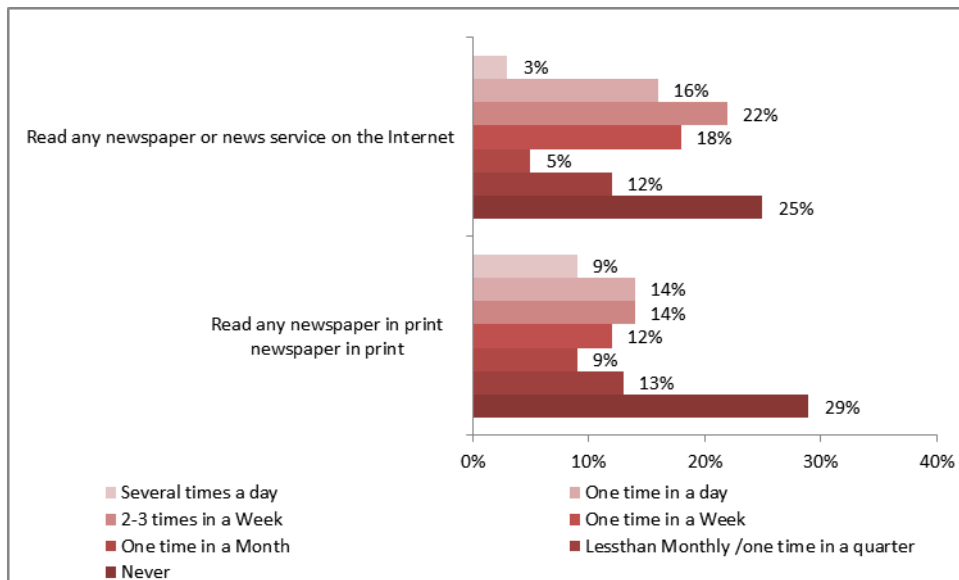


Table 4.7c: Frequency of newspaper readership (online vs offline) – income PKR 15,001 to 30,000

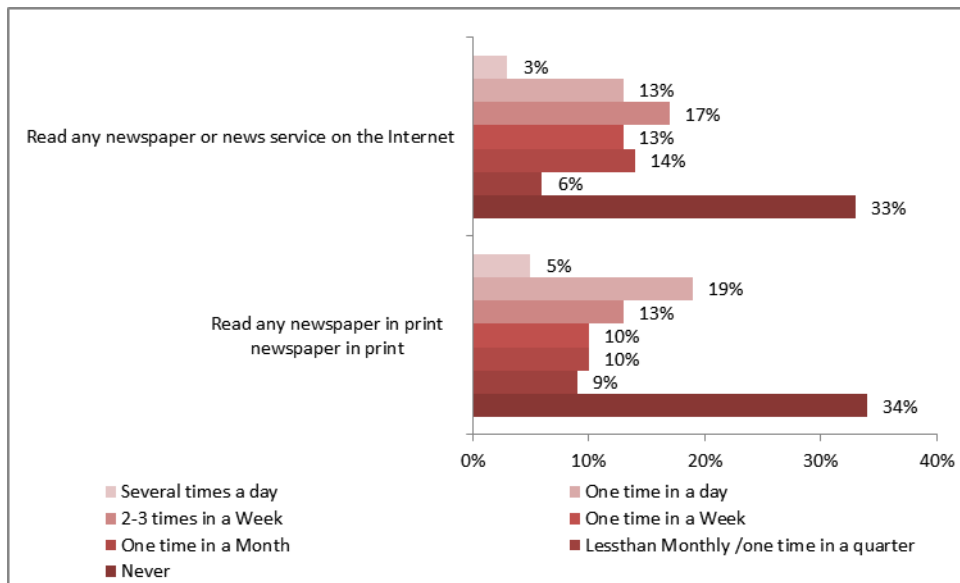


Table 4.7d: Frequency of newspaper readership (online vs offline) – income PKR 30,001 to 50,000

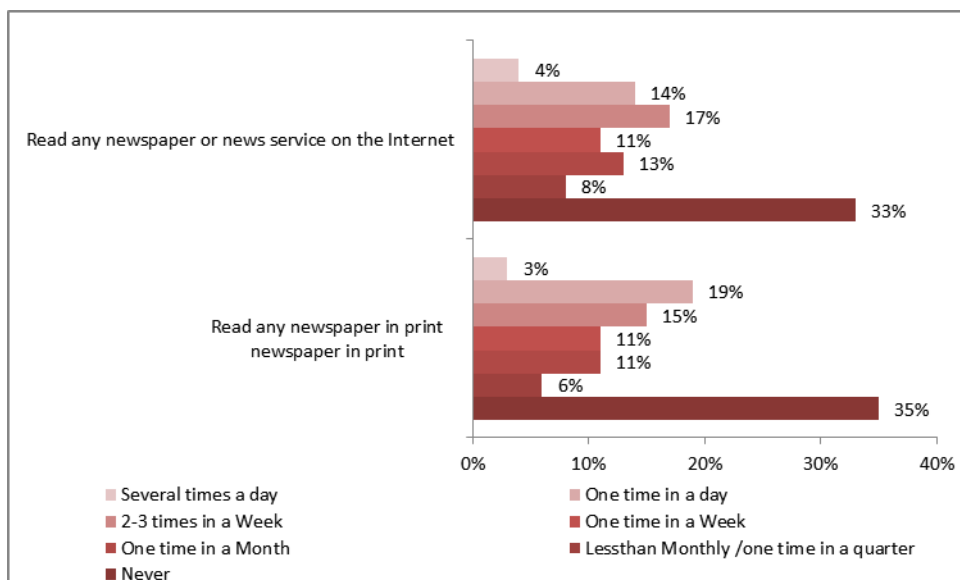
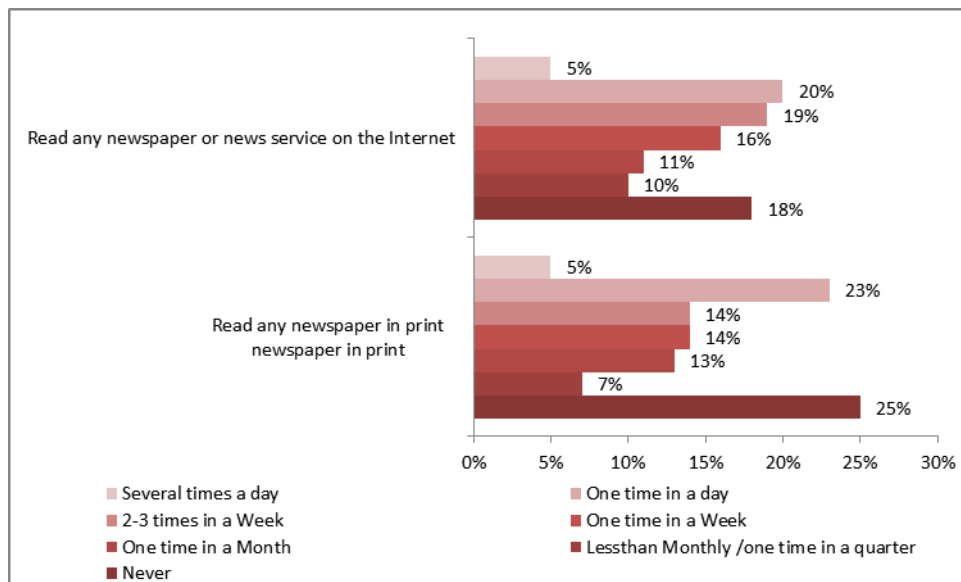
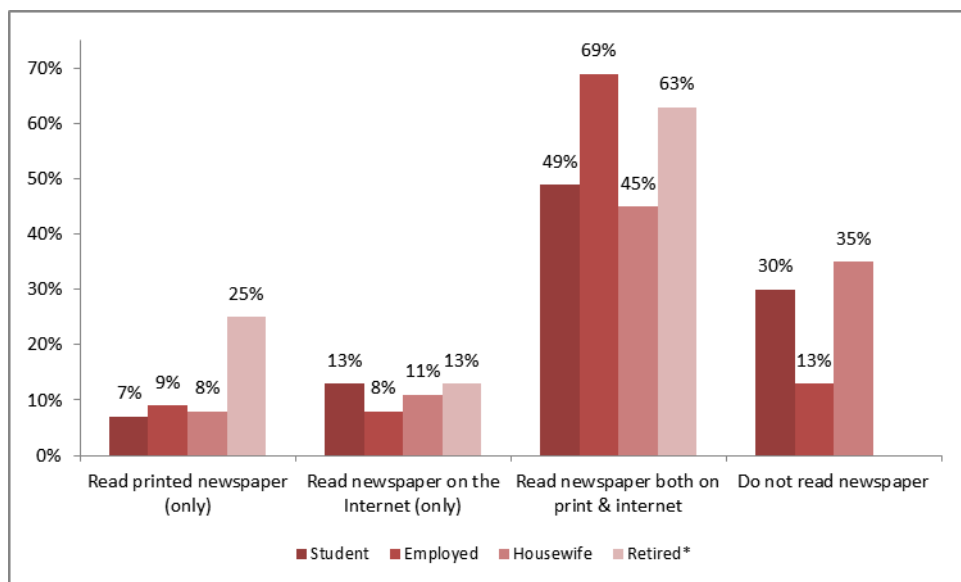


Table 4.7e: Frequency of newspaper readership (online vs offline) – income exceeding PKR 50,000



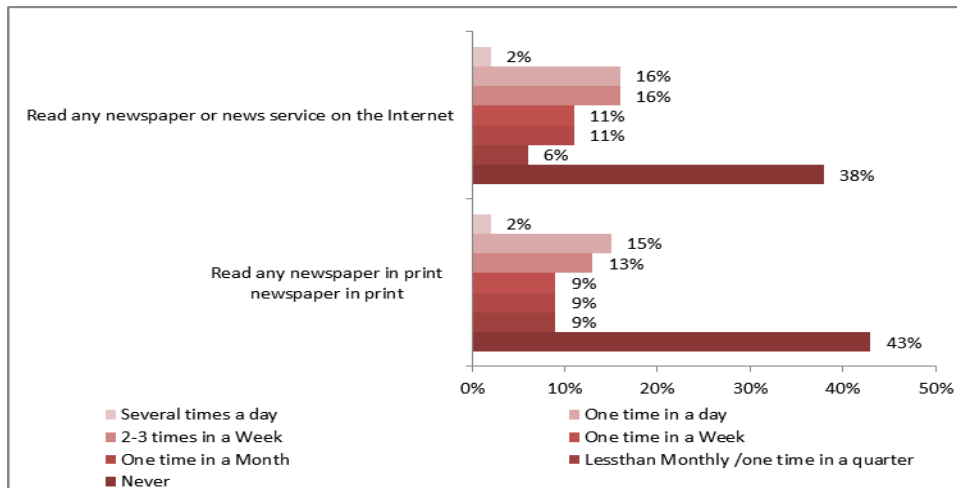
There were no significant differences observed among different income for daily and weekly frequencies [Fig 4.7b-Fig 4.7e]. However, low income groups were more likely to read newspaper offline (23%) on a daily basis and online on a weekly basis (40%). Their monthly readership was almost equal for both (13% vs. 12%)[Fig 4.7b]

Table 4.8a: Newspaper readership (online vs offline), by life stage



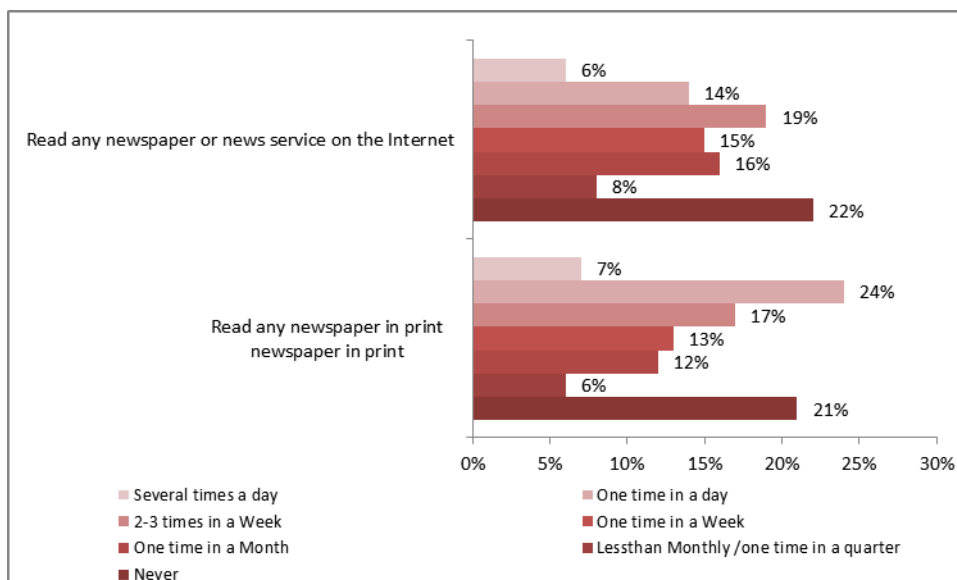
Employed persons surpass all other segments in reading newspapers both in print and online. 30% of students and 35% of housewives do not read newspapers at all.

Table 4.8b: Frequency of newspaper readership (online vs offline) – student



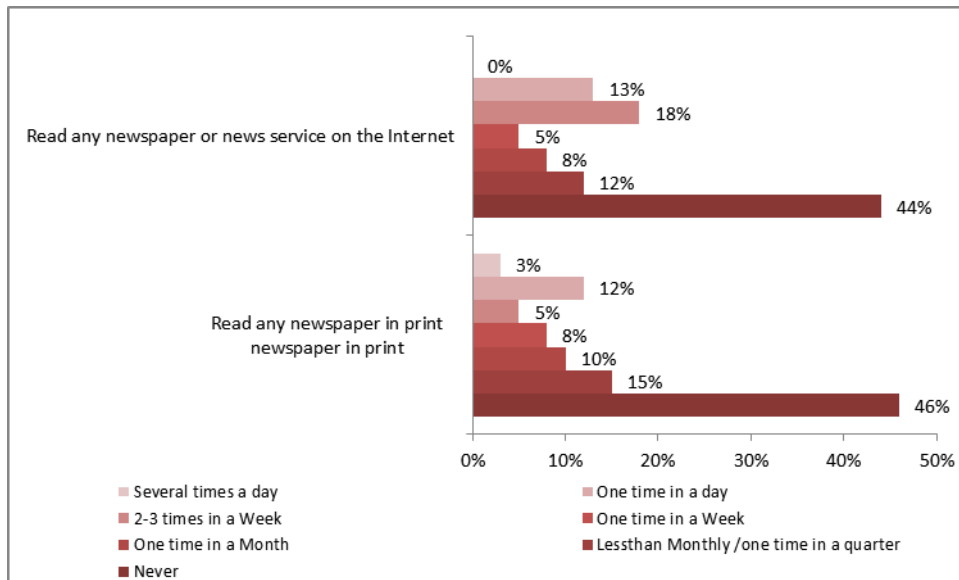
The daily readership of students, both online and offline was almost equal (18% vs. 17%). 43% of students didn't read print newspaper at all, whereas for online readership this figure was 38%.

Table 4.8c: Frequency of newspaper readership (online vs offline) – employed



The daily print readership was highest among employed as compared to other groups (24%). However for online readership, 20% of the respondents used online service on a daily basis, whereas more than one third (34%) read it on a weekly basis.

4.8d: Frequency of newspaper readership (online vs offline) – housewife



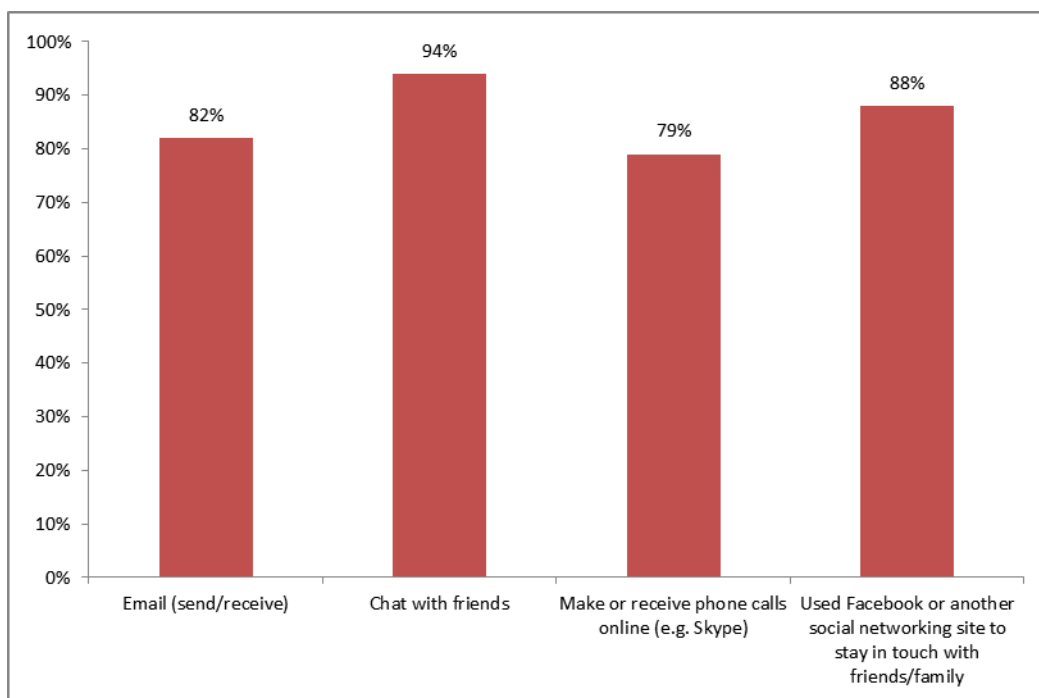
The daily print readership was not that encouraging amongst housewives as 46% of the respondents said that they never read any newspaper in print, while 15% of the respondents read newspapers once in a quarter. 12% of the housewives also said that they do read a print newspaper on a daily basis. 44% of the housewives never read any newspaper or news service, while 18% of the respondents said they do check online news few times in a week.

Usage (communication and creativity)

Our research indicates that online accessibility is a boon to staying in touch with family and friends. Nearly all users (94%) reported using chat frequently, while 88% reported they used Facebook, mainly for the same reason, to stay in touch with family and friends. However, we did not find that the capability of Web for self-publishing was appreciated as much, with questions about creativity being responded to by claiming the active posting of photographs. In fact, over 3/4 of all users mentioned posting photographs in connection with online creativity, but it is not clear whether this is really a new and different form of communication rather than creativity, per se.

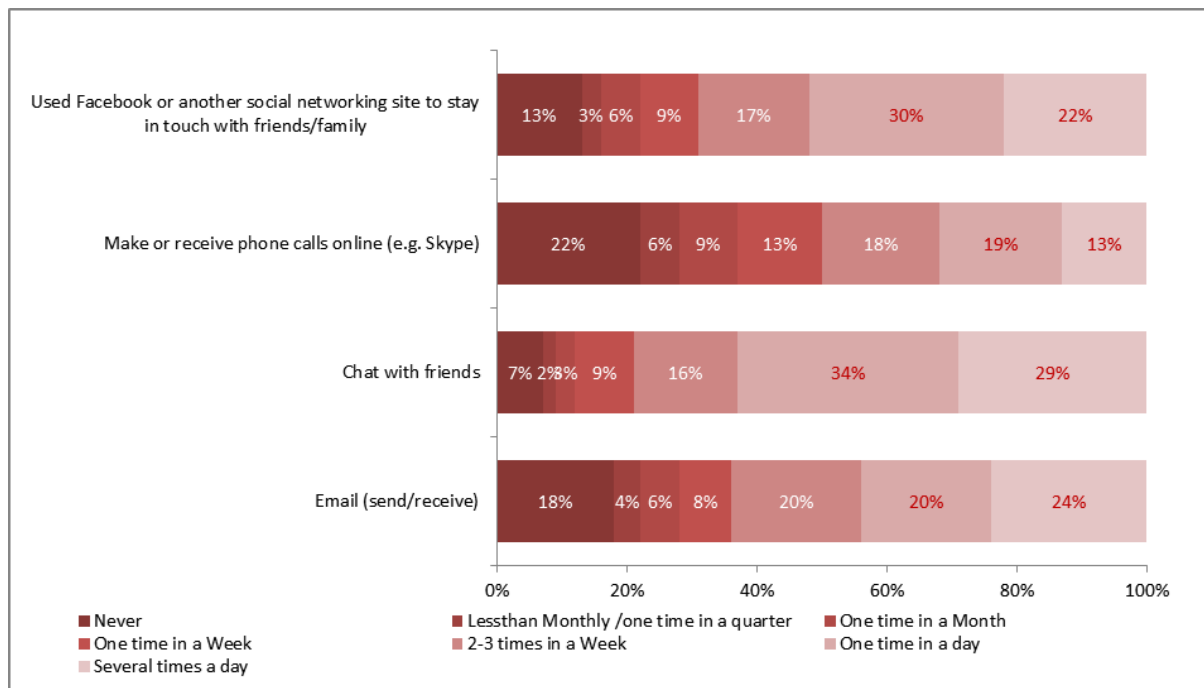
As a matter of fact, posting pictures (78%) is reported more popular (and far more frequent) than either reading (44%) or writing (34%) blogs, which lends some credence to this possibility. The lower numbers of students who report reading (40%) and writing (26%) blogs is not a good sign, and the relatively low frequency of even uploading pictures (the most popular form of online creativity reported) reinforces this conclusion.

Table 4.9a: Overall usage of types of online communication



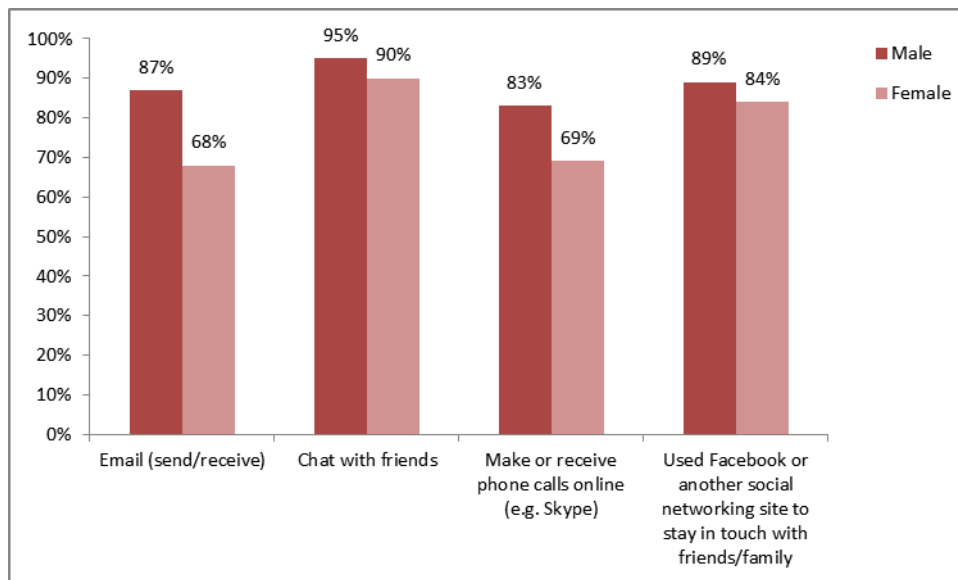
The most common way of communicating online is through live chat (94%), followed by the use of Facebook or other social networking sites (88%).

Table 4.9b: How frequently each type of online communication is used, overall



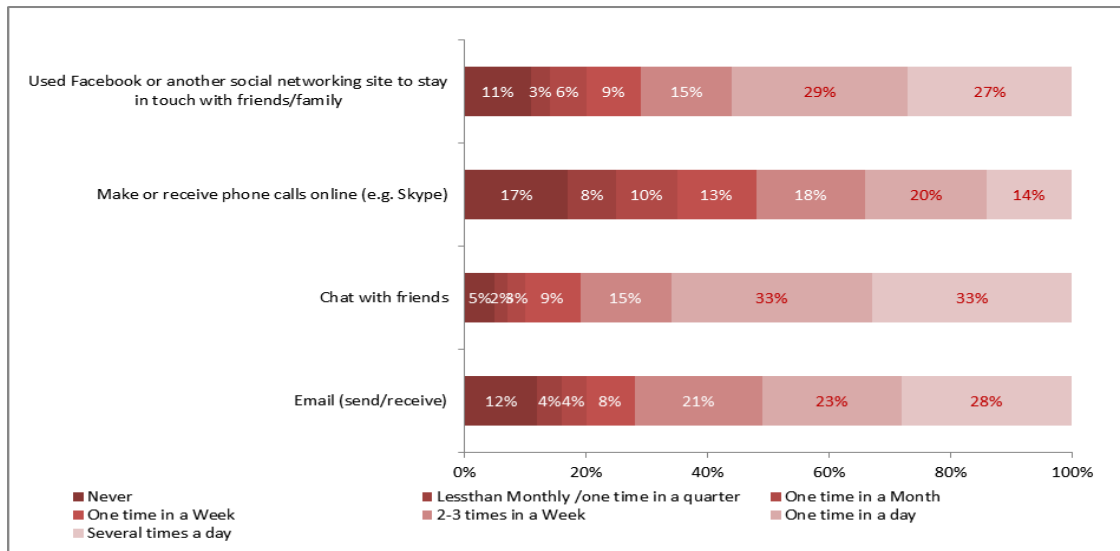
Chatting with friends was the most exciting activity for internet users as they have adapted it on a daily basis (34%) as well as multiple times (29%) followed by social website like Facebook having a daily share of 52%. Sending and receiving emails were also famous as twice a week (20%).

Table 4.10a: Gender-wise usage of types of online communication



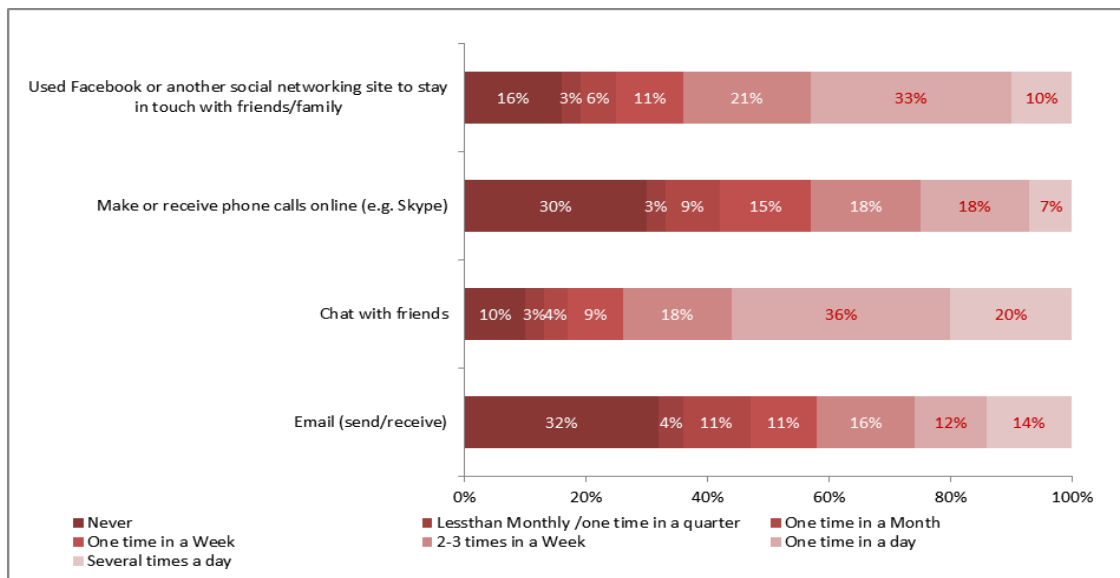
Males communicate online more than females. The two activities with the highest discrepancy between male and female communication were sending/receiving email (87% vs. 68%) and making calls online (83% vs. 69%).

Table 4.10b: How frequently each type of online communication is used - male



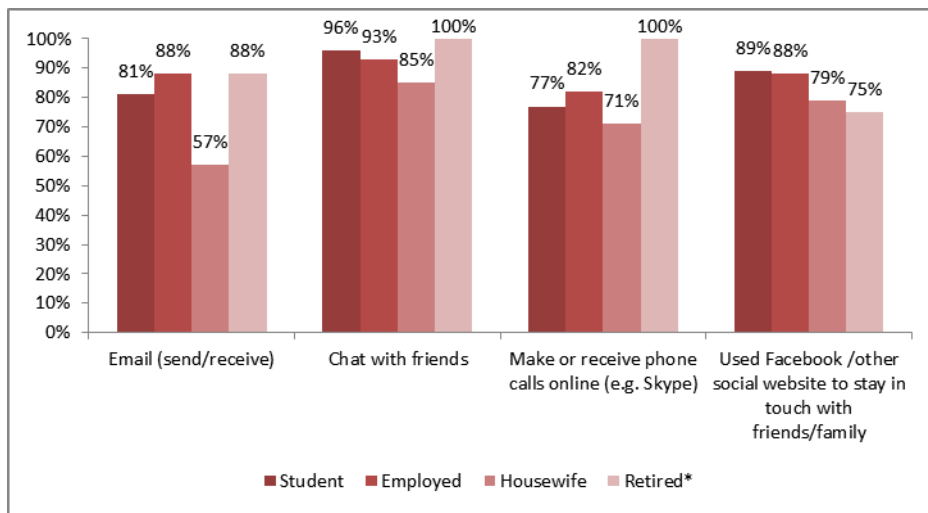
Overall chatting (66%) was the most participating daily activity for males followed by Facebook (56%) and sending/receiving emails (53%). However, weekly share was high for Skype calls (31%).

Table 4.10c: How frequently each type of online communication is used – female



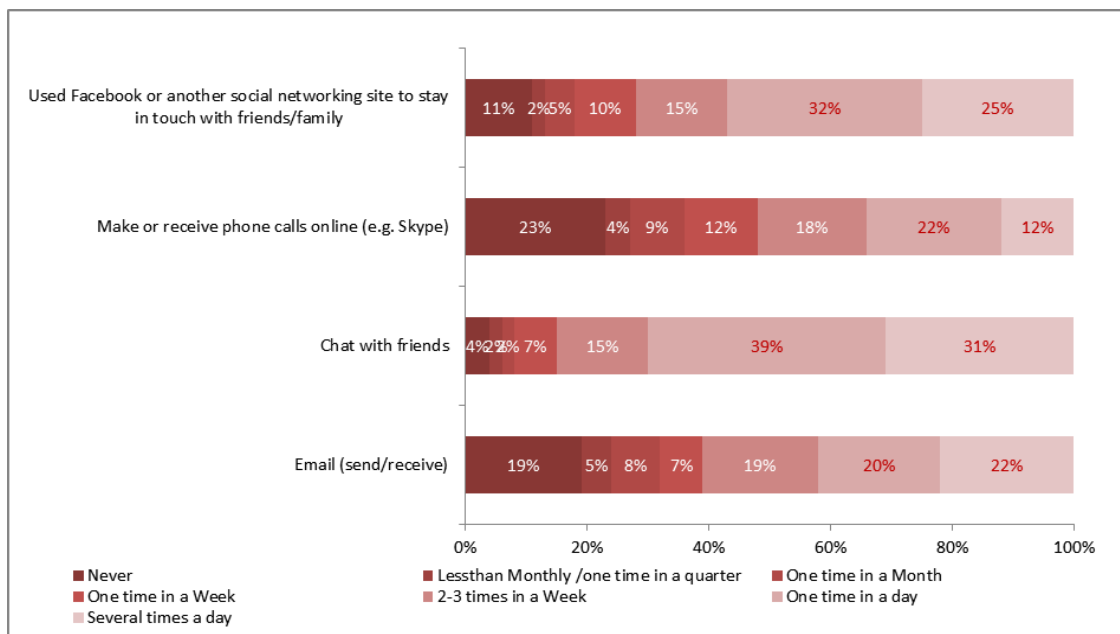
Females were less communicative for all online activities as compared to males. However, they are more likely to connect to Facebook once in a day as compared to males (33% vs. 29%). Live chat was the most popular activity for females as it is a part of their daily routine (56%), whereas famous weekly activity was Skype calls (33%). 32% of females never used internet for sending or receiving emails.

Table 4.11a: Usage of types of online communication, by life stage



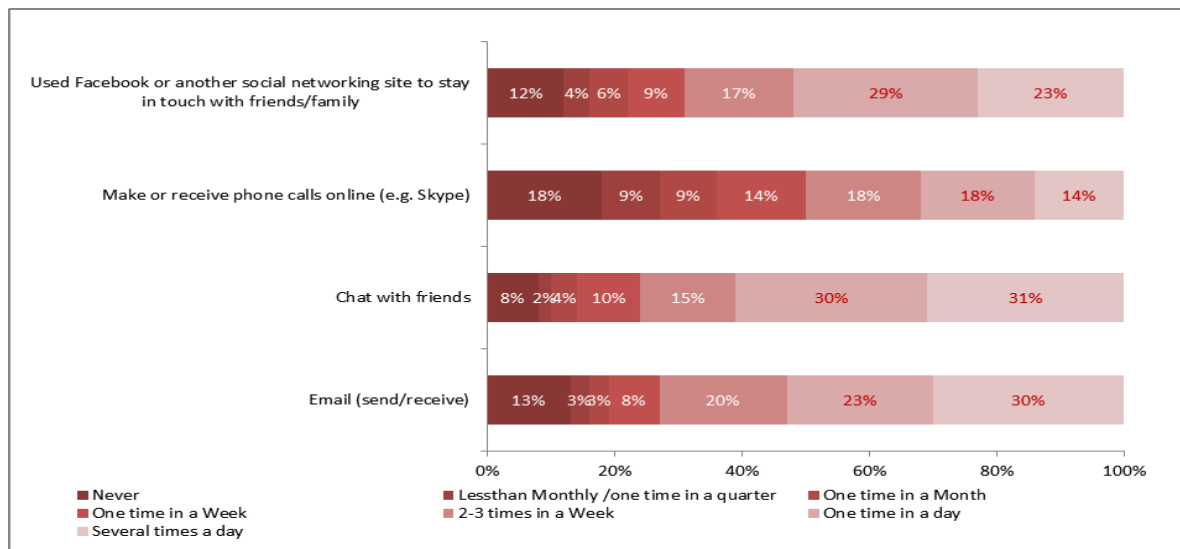
Live chat is the most preferred communication activity for students and retired persons. Housewives showed a lesser inclination towards email as a method of communication.

Table 4.11b: How frequently each type of online communication is used – students



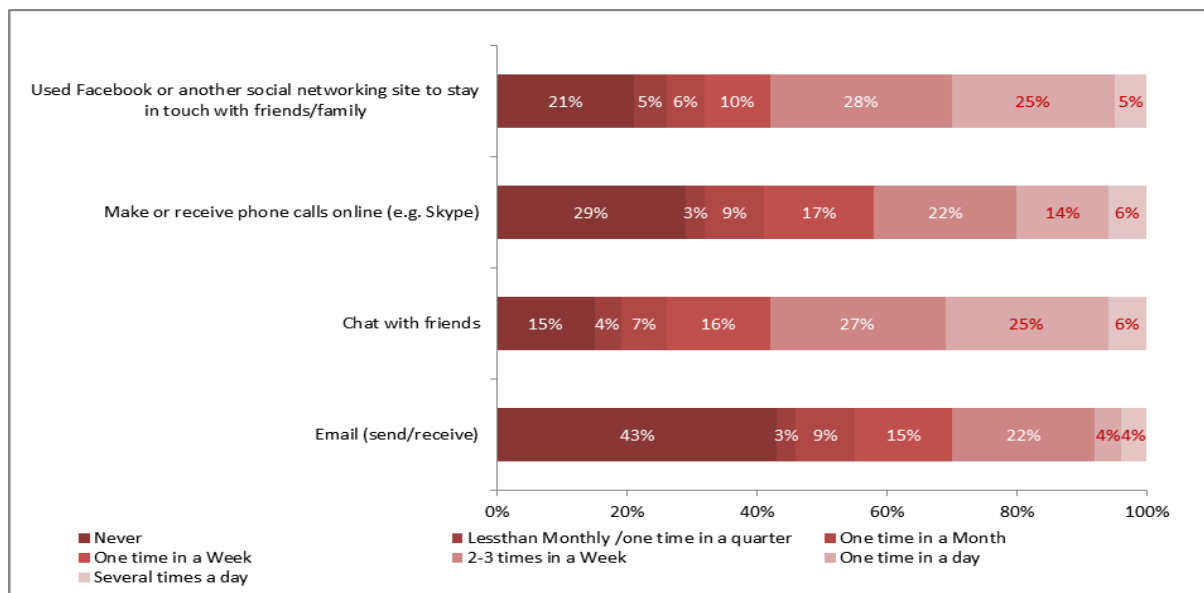
Students actively participated in online chat with friends as 31% of them did engage in it multiple times daily and 39% once in a day. They are also addicted to Facebook as one fourth of them liked to stay connected on Facebook multiple times a day and 32% get online once in a day. Students also used email for communication as 42% used it on a daily basis and 19% use it twice a week.

Table 4.11c: How frequently each type of online communication is used – the employed



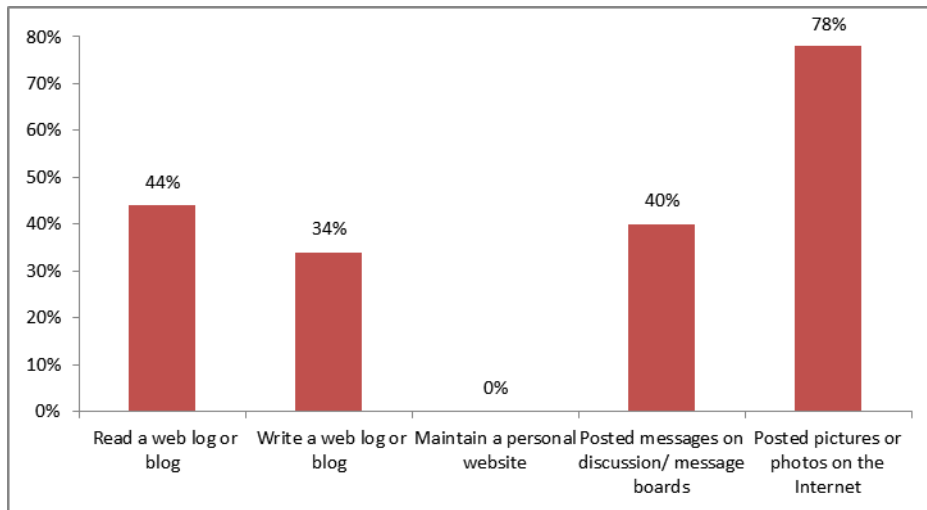
There seemed a consensus on live chat and emails when employed group replied towards online communication (31% vs. 30%) several times a day. Facebook competed with chat for daily share (29%) and emails for weekly (28%).

Table 4.11d: How frequently each type of online communication is used – housewives



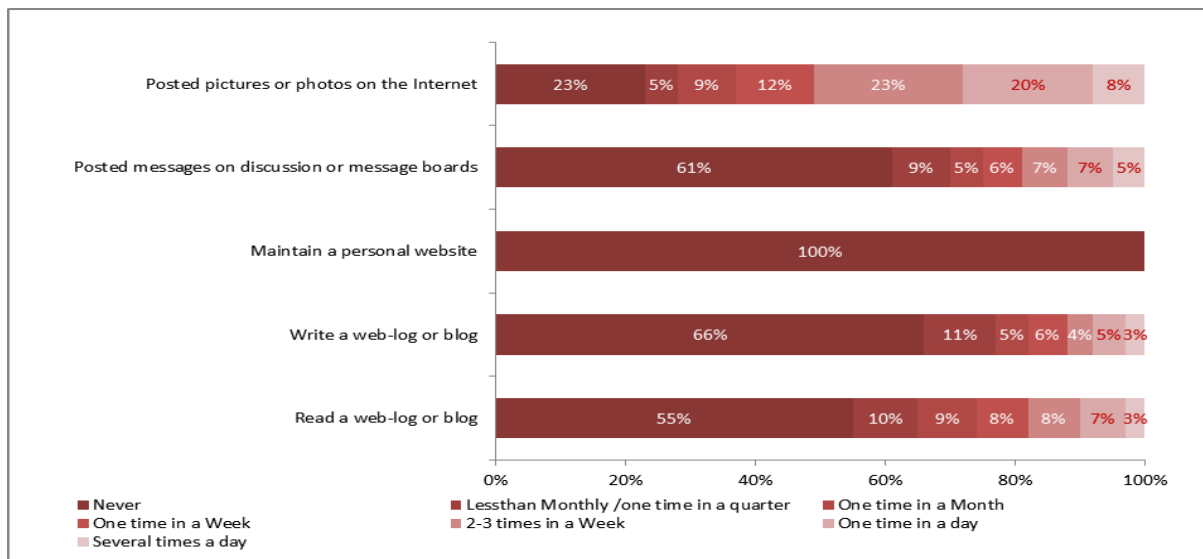
Housewives used Facebook (52%) for daily communication more as compared to other online sources. Chatting was the second most popular activity for housewives both on a daily (31%) and weekly basis (43%).

Table 4.12a: Creative usage of the internet, overall



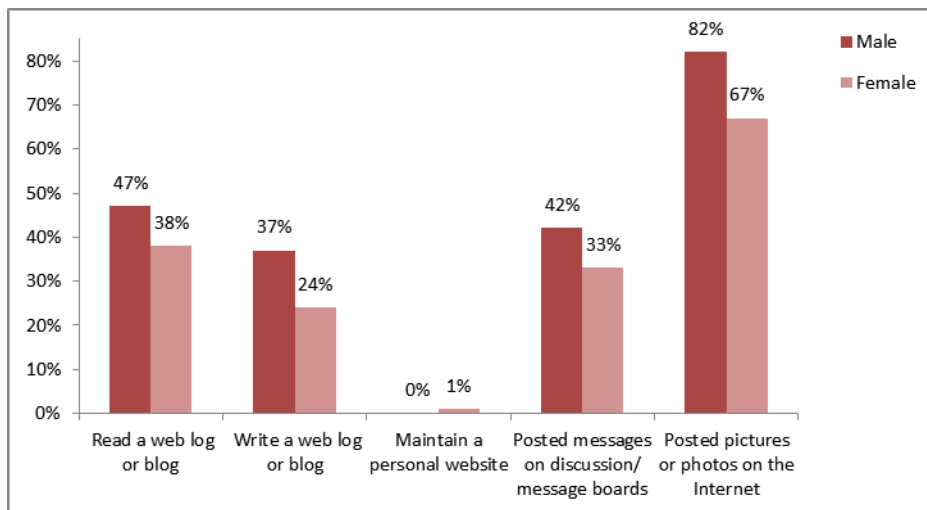
As expected, content creation is lower than communication. More than three fourths of the users (78%) participated in posting pictures on the internet and this activity surpassed all other productive online activities. Users did take part in reading a web blog or its comments but did not show particular interest in posting messages on or writing their own blog.

Table 4.12b: How frequently respondents engage in each creative activity, overall



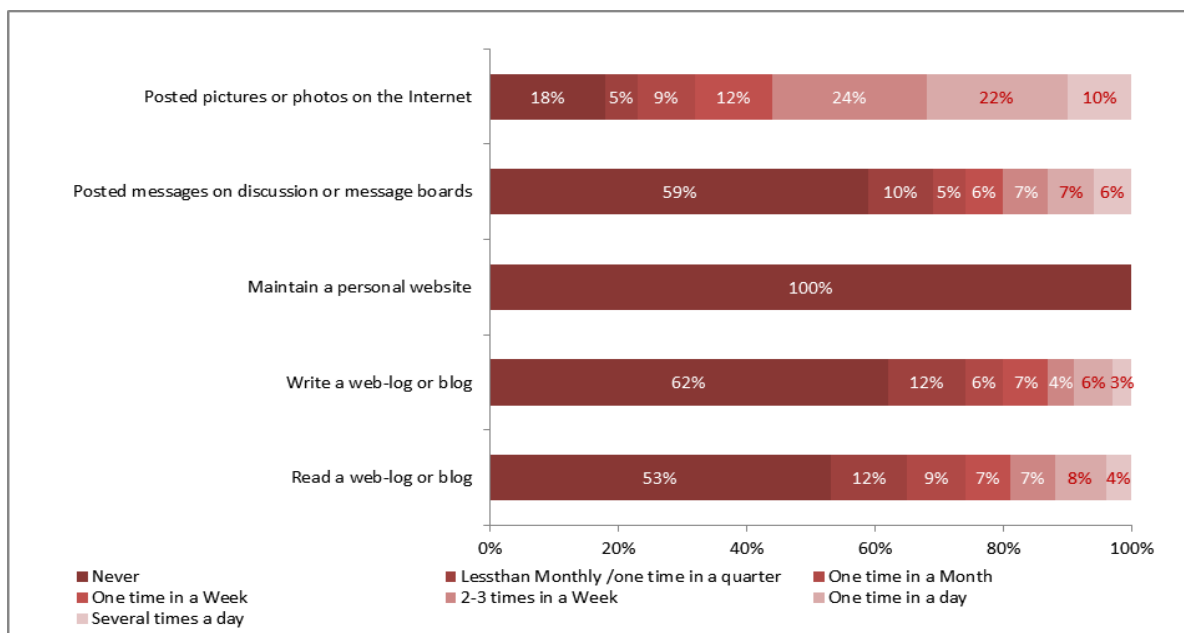
The internet users seemed creative only while posting pictures/photos on the internet with a daily share of 28% and a weekly share of 35%.

Table 4.13a: Creative usage of the internet, by gender



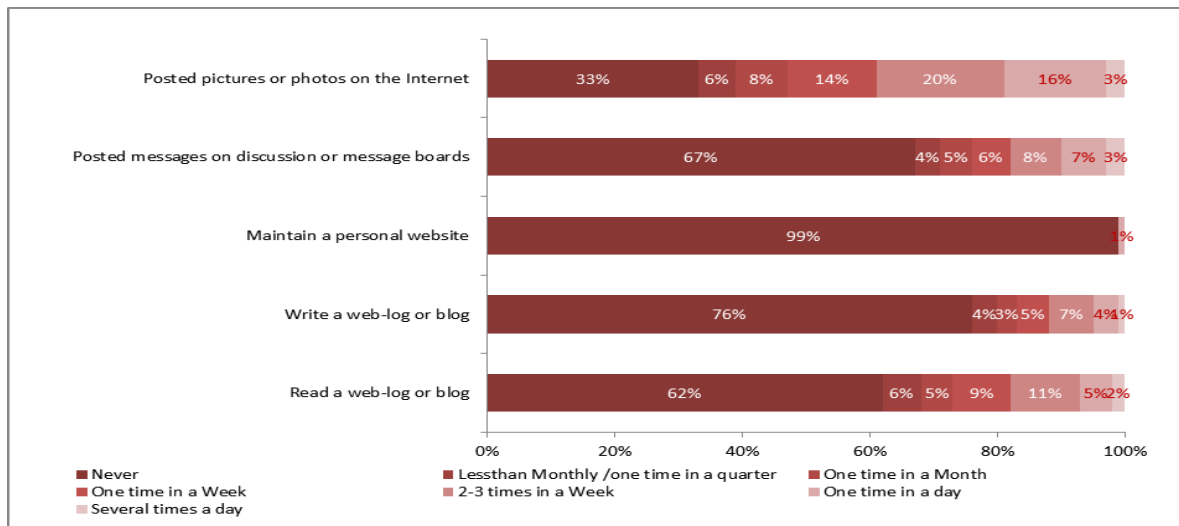
Females participated less in all content creation activities vs. males. Both genders were more likely to participate in posting/uploading pictures on the internet than any other productive online activity.

Table 4.13b: How frequently respondents engage in each creative activity – male



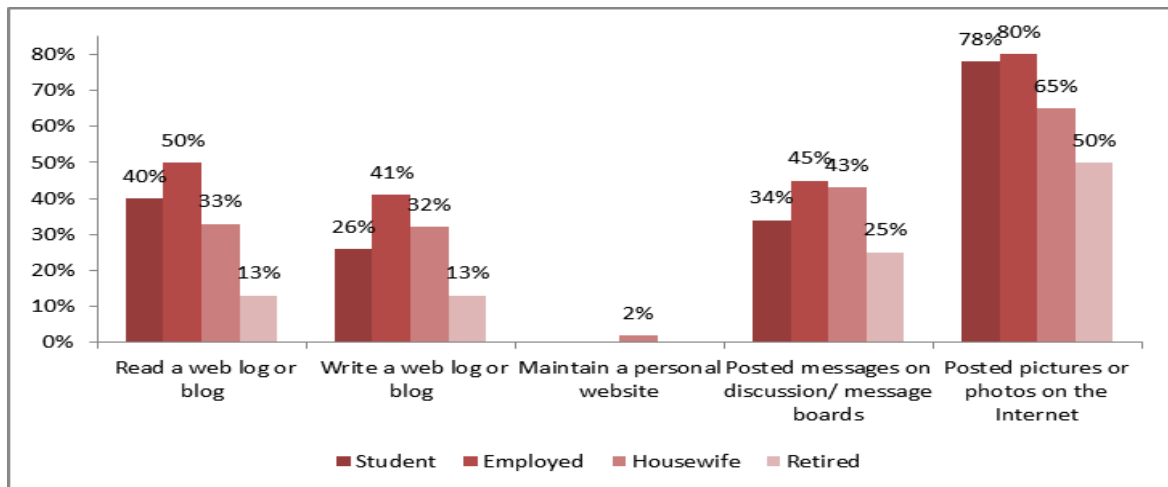
The weekly participation of males was not very prominent but seemed equal for content production like reading a blog (14%) followed by posting messages on discussion boards (13%) and writing a blog (11%). The highest daily share was observed for posting pictures (32%) and weekly share as 36%.

Table 4.13c: How frequently respondents engage in each creative activity – female



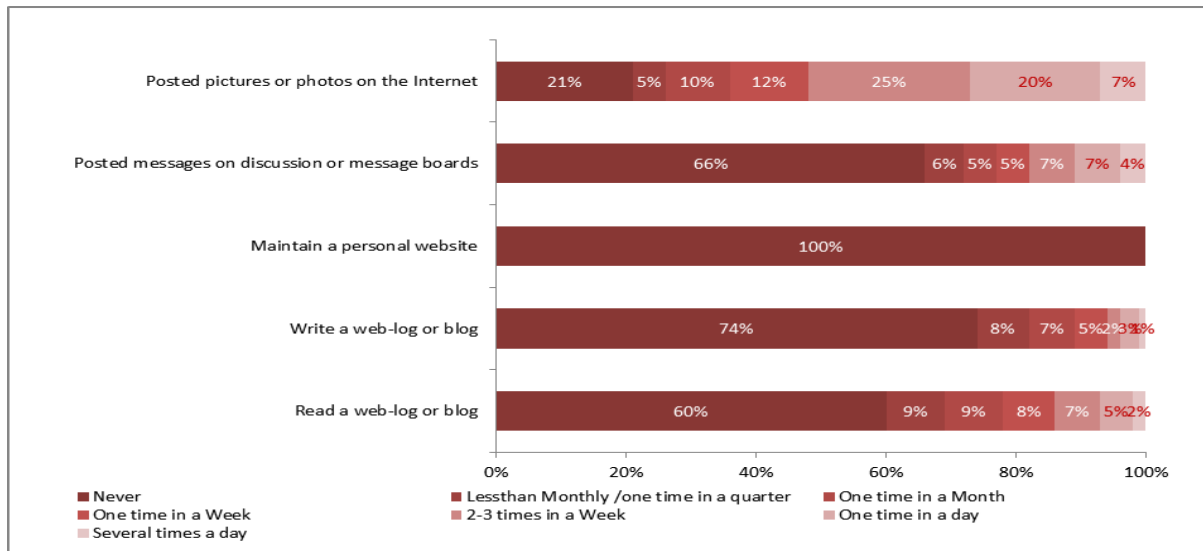
Females took part in reading a blog (20% weekly) but didn't show significant interest in producing content. However, just like males, their online creative share was the highest for posting pictures daily (19%) and weekly (34%). For posting messages on discussion boards they maintained a weekly share almost equal to males (14% vs. 13%). Maintaining a website was also observed slightly among the female segment (2%).

Table 4.14a: Creative usage of the internet, by life stage



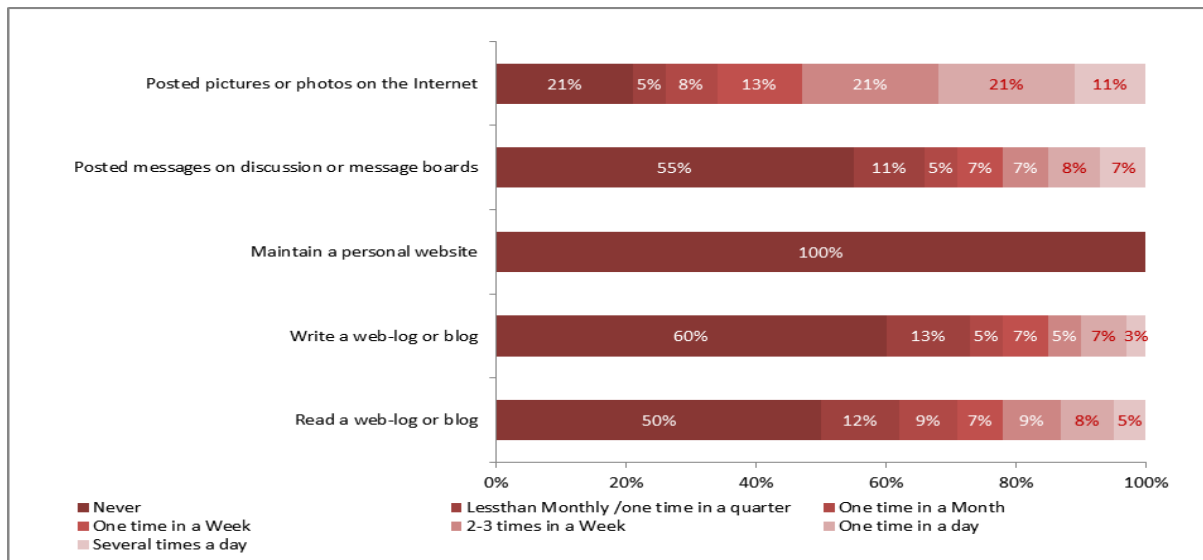
Employed users were the most frequent producers of online content. Overall, they posted and uploaded photos more frequently (80%) followed by reading blogs (50%). Students and housewives were less likely than employed users to undertake most creative activities.

Table 4.14b: How frequently respondents engage in each creative activity – students



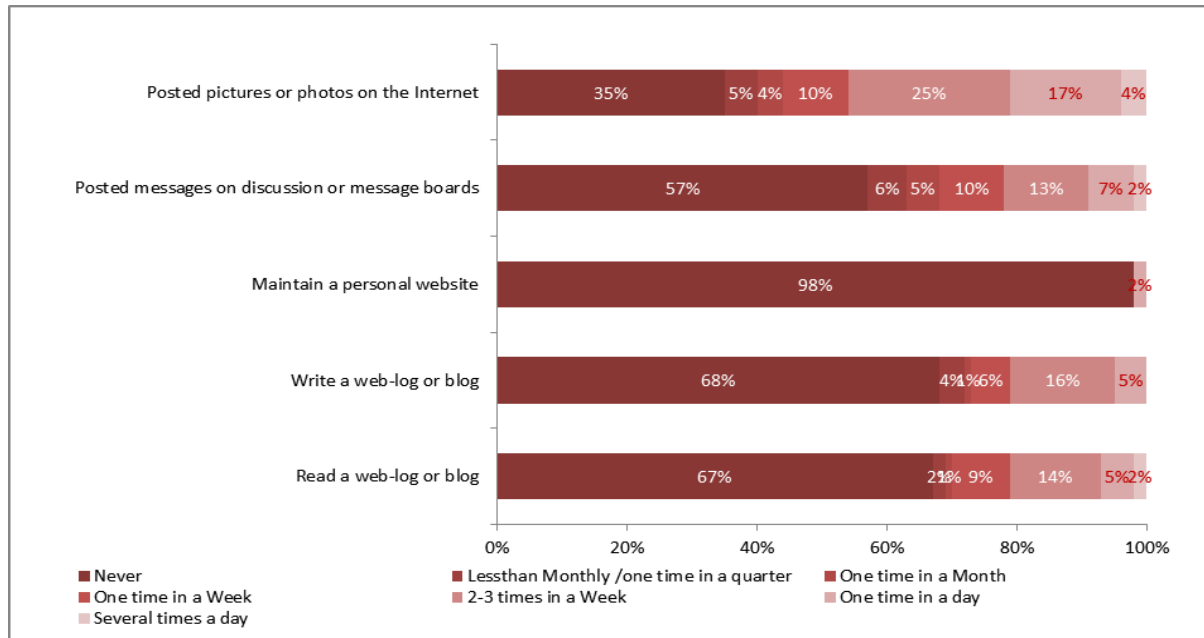
Students didn't actively participate in writing an online blog and other content based activities. Their weekly share for reading a blog was 15%. They keenly took part in posting pictures and photos with 27% daily and 37% weekly share.

Table 4.14c: How frequently respondents engage in each creative activity – the employed



The employed group was also inclined towards posting pictures on the internet but they also participated daily in reading blogs (13%) and posting messages on discussion boards (15%). The weekly share was 16% and 14% respectively. The highest participation was for posting pictures daily (32%) and 34% weekly.

Table 4.14d: How frequently respondents engage in each creative activity – housewives

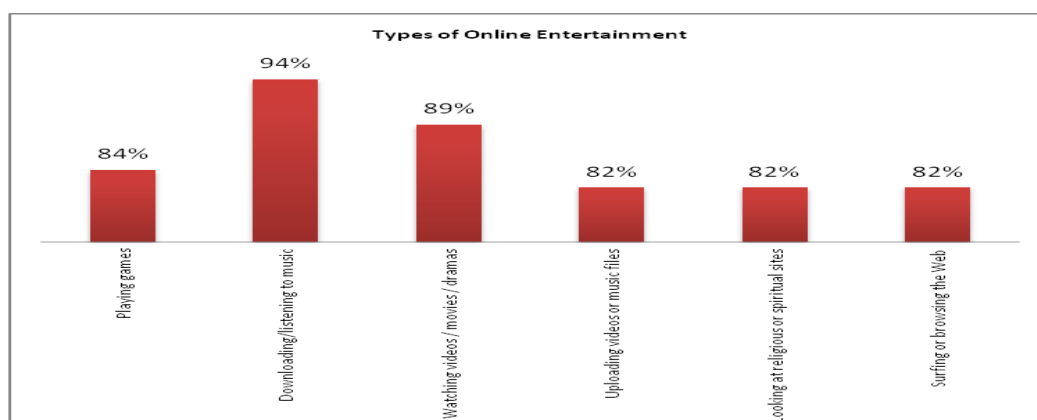


The daily and weekly famous activity for housewives was posting pictures (21% vs. 35%). The weekly participation of housewives was equal for posting messages on discussion boards and reading a web blog (23%).

Usage (entertainment)

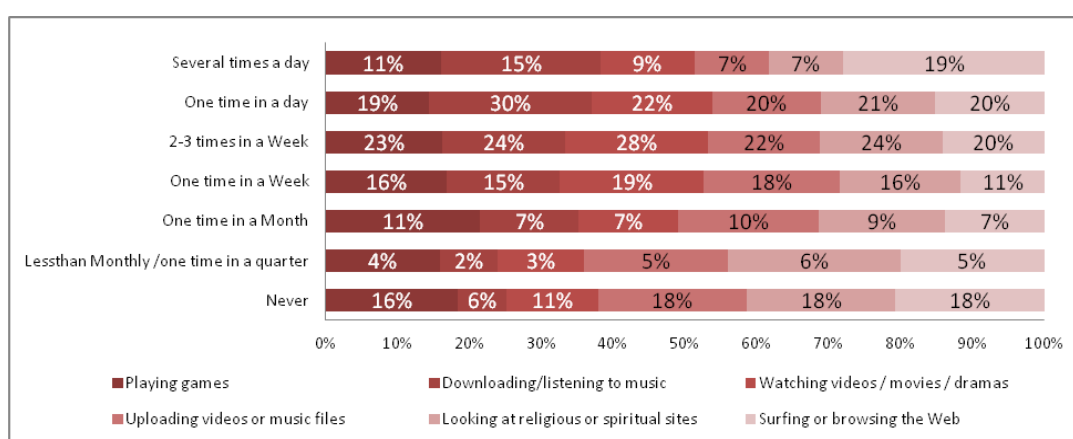
Music (94%), video (89%) and games (84%) were major reasons for using online access, trumping by far any productive activity. However, men are more likely and frequent participants in these forms of activity. Interestingly, within the narrow focus of faith-related activity, men were also slightly more likely (84%) to access such sites more frequently than women (76%). Women did report a greater preference (52%) than men (45%) for accessing films/drama/videos on a regular basis, however.

Table 4.15a: Internet usage for entertainment, overall



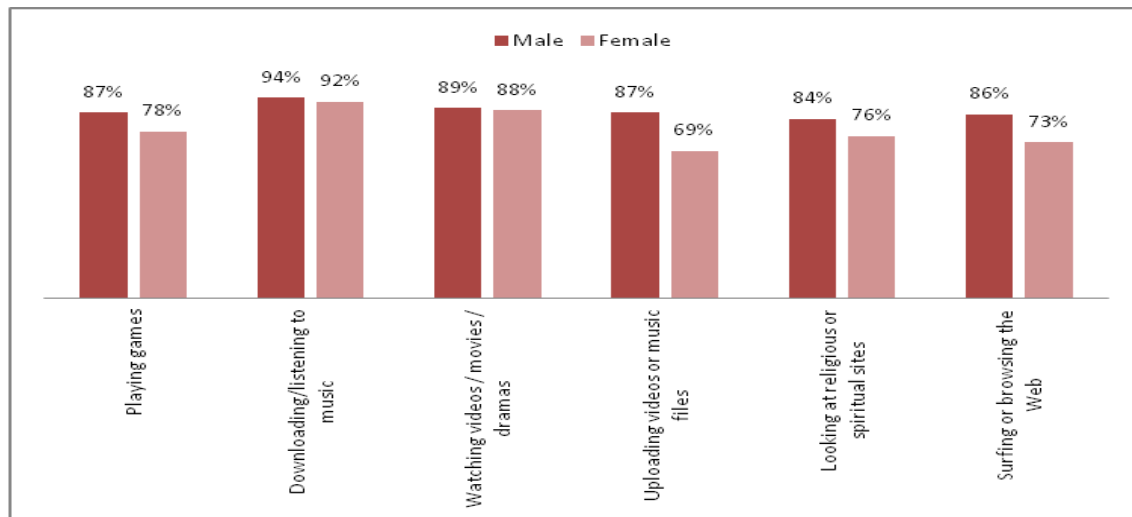
The internet users were closely engaged in online entertainment and leisure activities. The most common entertainment activities were downloading/listening to music (94%), watching videos/dramas (89%) and playing games (84%).

Table 4.15b: How frequently respondents engage in online entertainment, overall



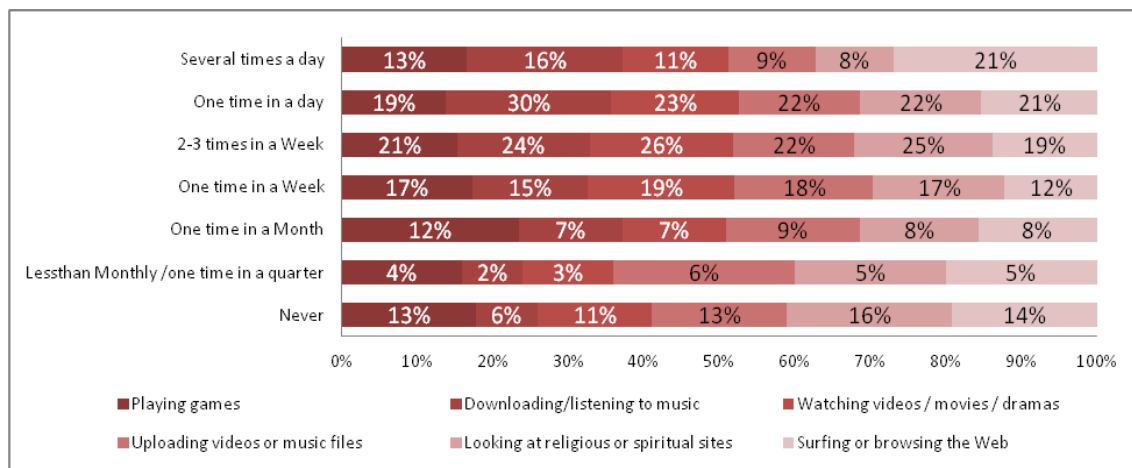
Downloading/listening to music was the most exciting activity throughout the daily (45%) and weekly routines (39%). The daily share of surfing the internet several times a day was the highest (19%). Watching videos/movies/dramas (47%) got the highest weekly share. Whereas, looking at religious sites and uploading videos followed with an equal weekly share (40%).

Table 4.16a: Internet usage for entertainment, by gender



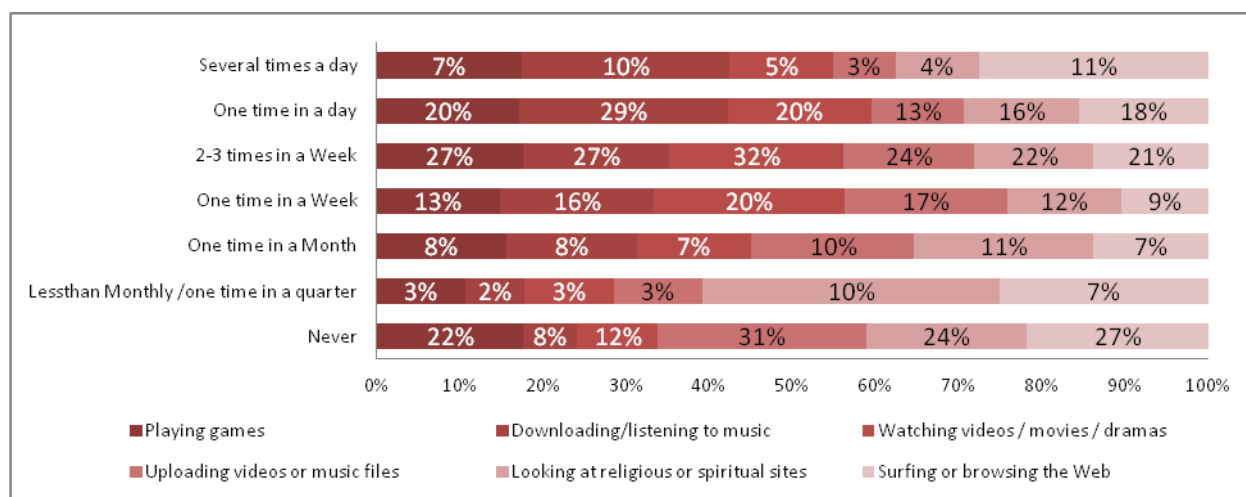
Females closely follow males in pursuing all entertainment-related activities, especially in watching videos and downloading music. Females trail behind the most in uploading videos and generally browsing the web.

Table 4.16b: How frequently respondents engage in online entertainment – male



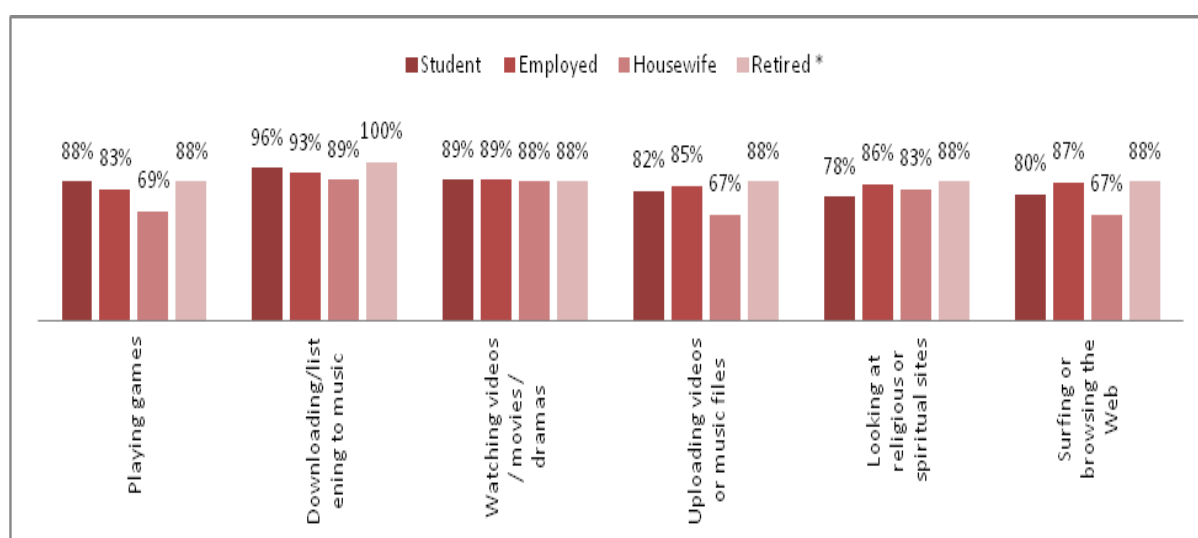
Males were more inclined towards downloading/listening to music (46%) followed by browsing (42%) as a part of their daily routines. The other entertainment and leisure based activities which took highest weekly share were watching videos/movies/dramas (45%) followed by looking at religious sites (42%) and uploading videos (40%).

Table 4.16c: How frequently respondents engage in online entertainment – female



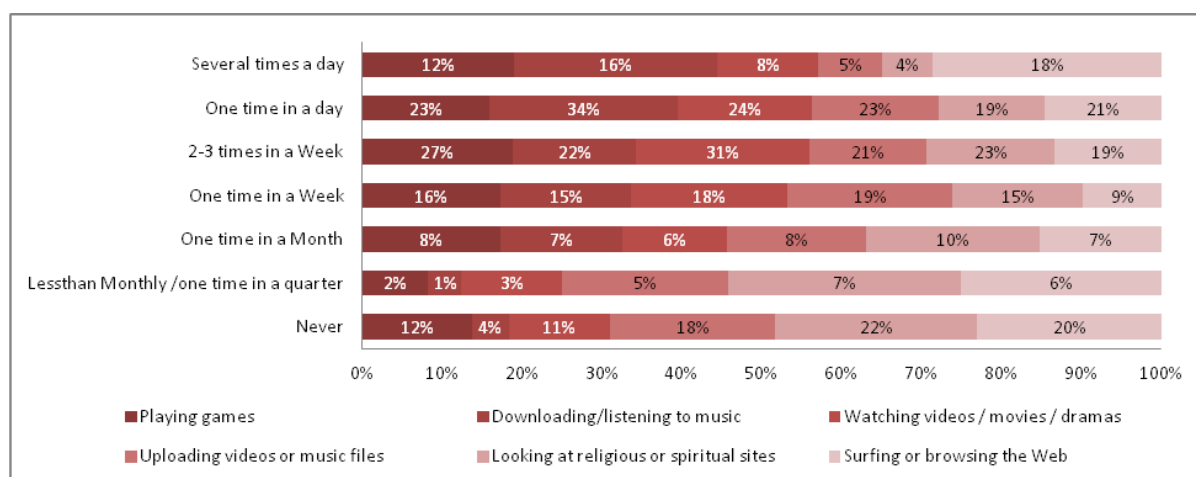
The daily share of females for all leisure activities was low as compared to males. However, for downloading/listening to music (39% vs. 46%) and playing games (27% vs. 32%) they were close to males. Females are ahead of males in watching videos /dramas/movies on weekly basis (52% vs. 45%).

Table 4.17a: Internet usage for entertainment, by life stage



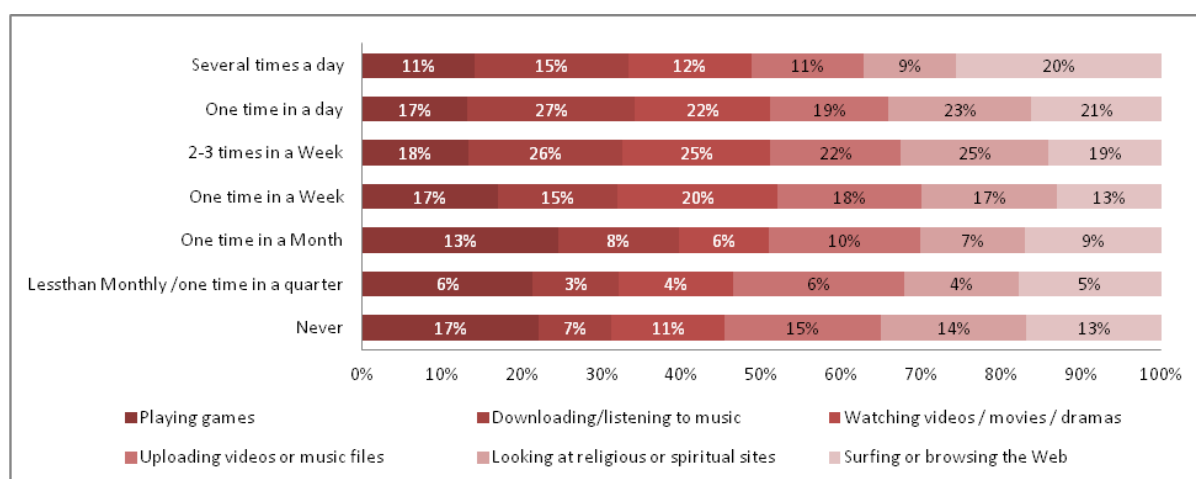
Students and employed users most frequently participated in online entertainment and leisure activities. They were more likely to download/listen to music (96%), watch videos (89%) and play games (88%). Housewives seemed less inclined to play games, upload music/videos and in general web browsing.

Table 4.17b: How frequently respondents engage in online entertainment – students



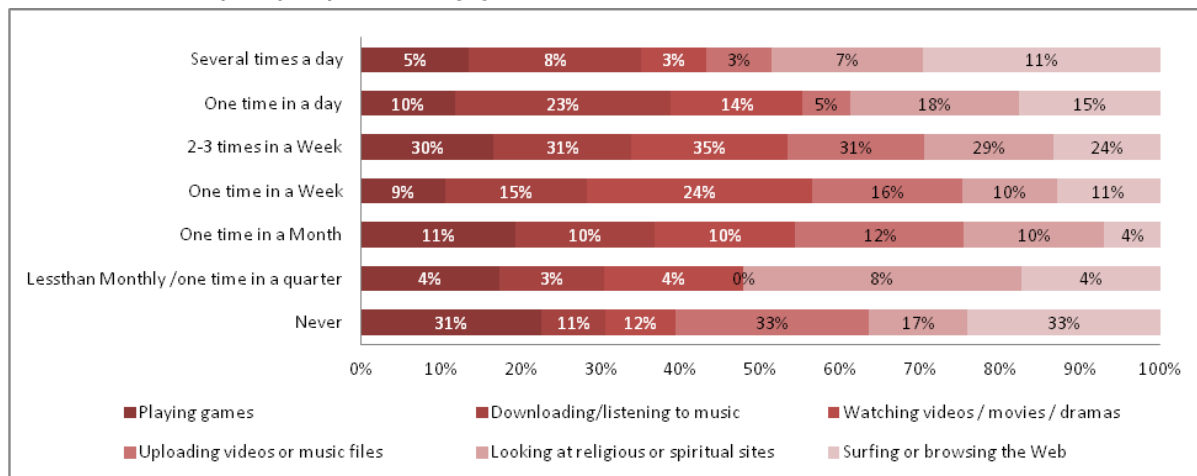
Students were closely engaged in downloading music or listening to music than any other entertainment based activity as their daily routine (50%). The popular weekly activities were watching videos/dramas/movies (49%) and playing games (43%).

Table 4.17c: How frequently respondents engage in online entertainment – the employed



The employed group mainly inclined towards downloading music but they are still less in comparison to students in the daily share (42% vs. 50%). They actively participated in web browsing on a daily basis (41%) and watching videos /dramas/movies on a weekly basis (45%).

Table 4.17d: How frequently respondents engage in online entertainment – housewives



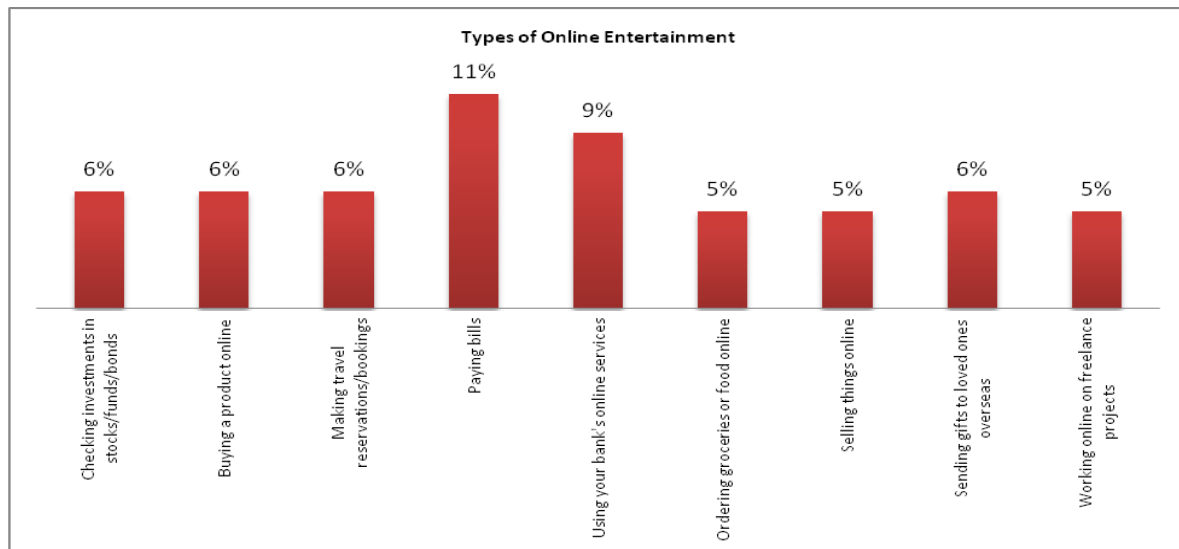
Housewives were the least active groups in the life stage segment as their daily share revolves around downloading music but they have the highest weekly share for watching videos/drams/movies (59%) and downloading/listening to music (46%). One third of the housewives never connected to the internet for browsing and uploading videos/music files.

Usage (e-commerce)

Direct use of the Net for e-commerce activity is presently very low. Within the various categories of activities we use to describe e-commerce, those perceived as being low-risk (paying bills, or looking at bank statements, for instance), get the highest level of popularity, but even this is very low indeed, barely single digit numbers (11% and 9% respectively). These activities also happen to be regular and fairly low frequency (most kinds of bills only need be paid once a month, for instance). With such low numbers, it is hard to spot or even focus on trends. However, of those who have actually used online services for purchases, it is interesting and relevant to know that they significantly prefer (71%) cash payment (COD) over credit cards or direct bank transfers. P@SHA has been working on improving the infrastructure for online funds interchange, and this study shows us that more work is needed in this area, to improve the perceived reliability and lower the levels of risk perceptions.

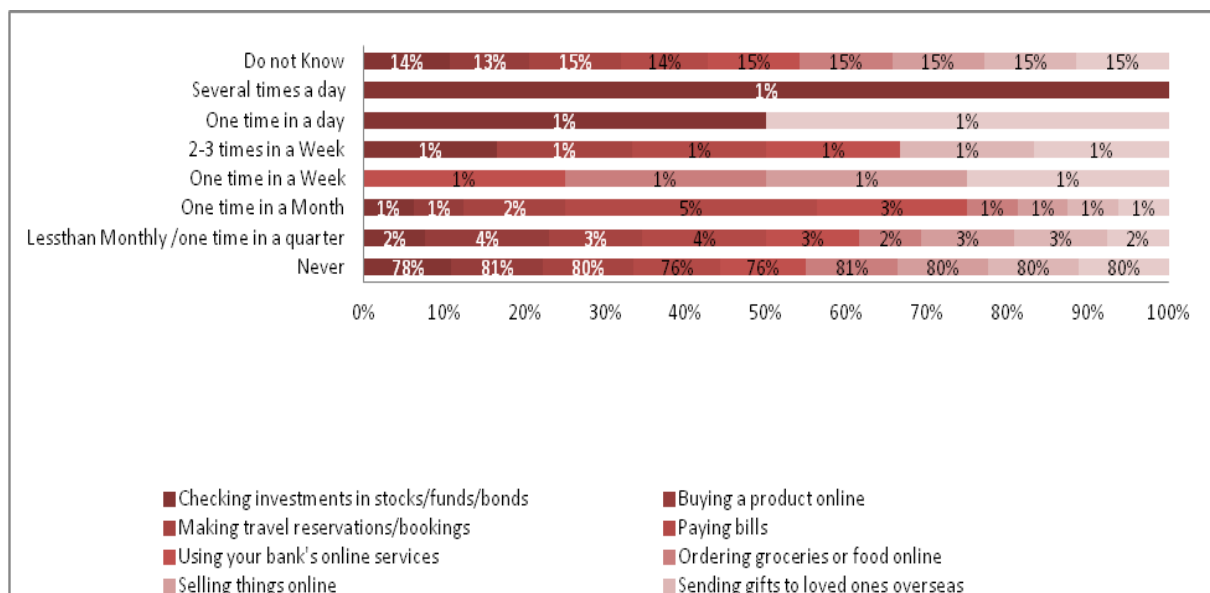
We also looked at perceptions of advertising online, with almost equal numbers of opinions reported between positive, negative or indifference. Overall, however, recall rates for highly frequented sites such as Facebook were nearly as high as for television, which is also a very interesting finding. About a quarter of the respondents reported joining group pages on Facebook, mainly (67%) because they were recommended to do so, or rather, perceived a recommendation, due to tagging by a friend or family member. Half also said that they liked the product/brand/company, though.

Table 4.18a: Overall usage of internet for financial transactions



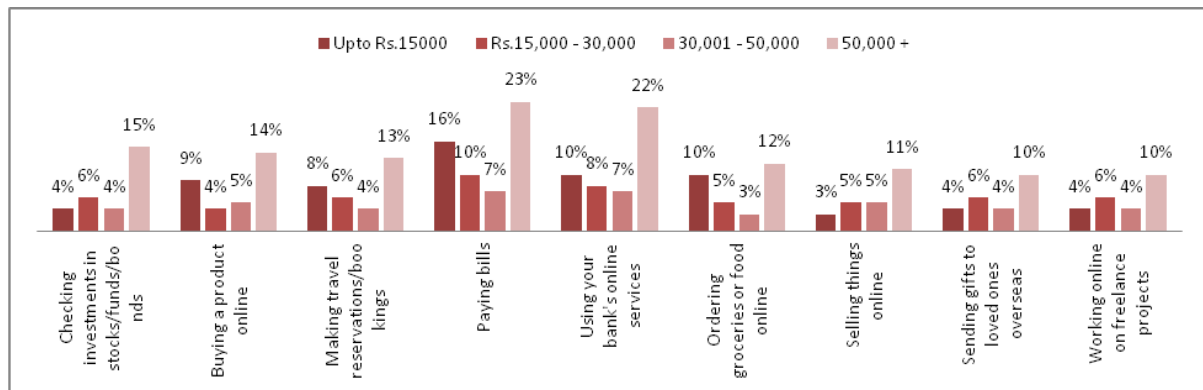
Users engaged in e-commerce activities mostly for financial services like paying bills (11%) and handling online bank accounts (9%). All other activities shared equal participation by the users – between 5% - 6%.

Table 4.18b: Frequency of internet usage for financial transactions, overall



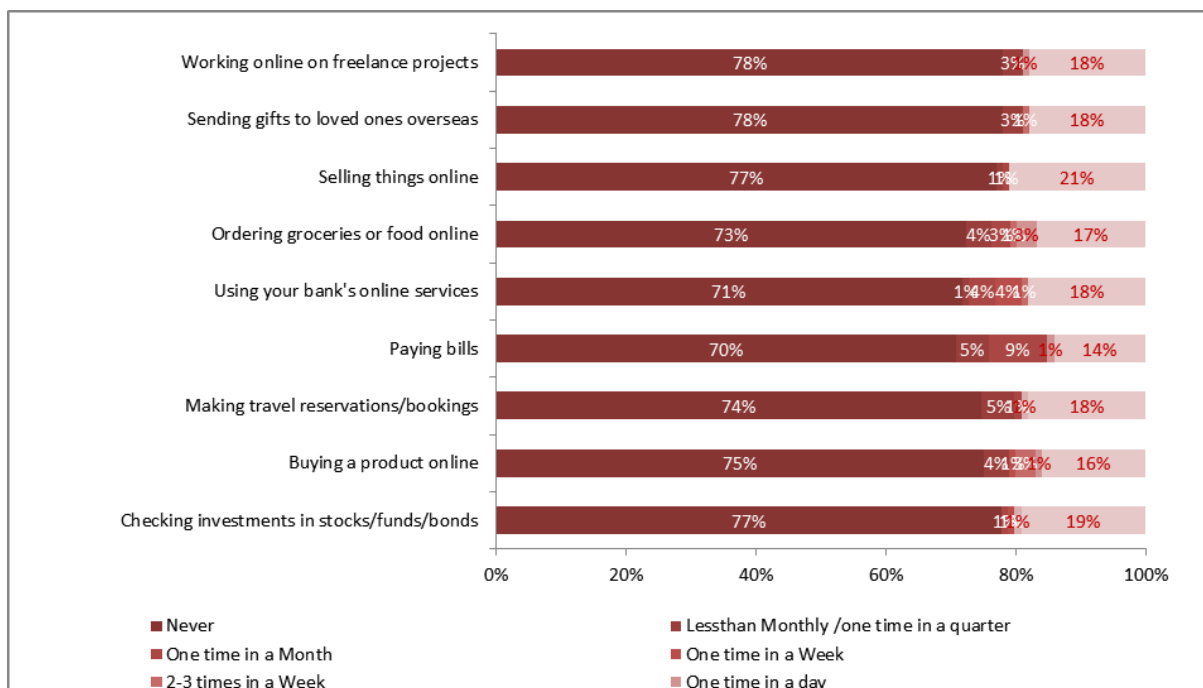
The daily and weekly participation of all e-commerce based activities were insignificant. However, the famous monthly activities were paying bills (5%) and online banking (3%).

Table 4.19a: Overall usage of internet for financial transactions, by income



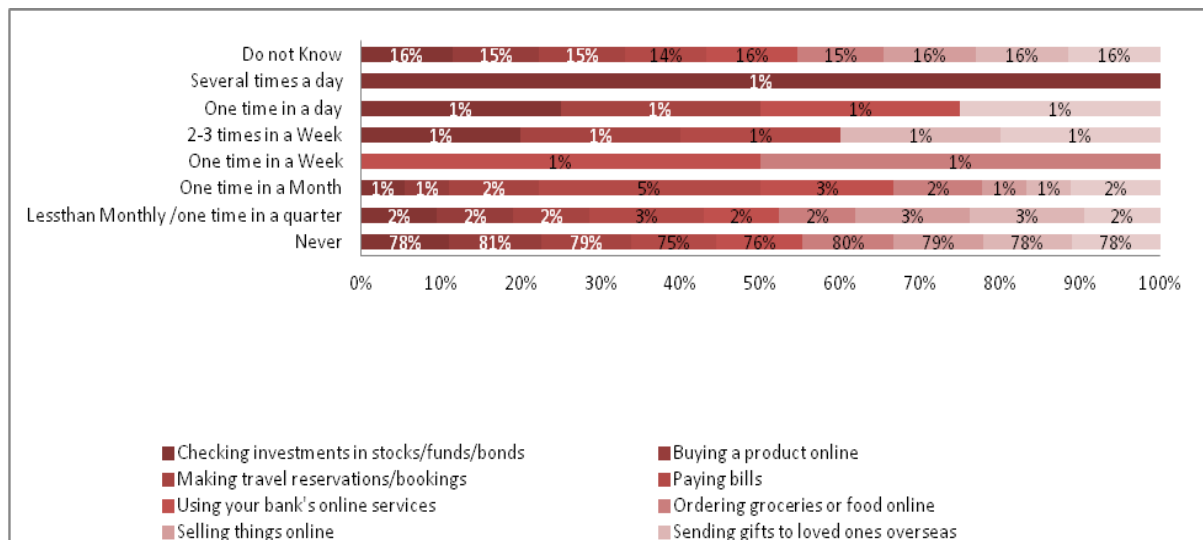
Users earning more than 50k were much more likely to engage in e-commerce. Other than paying bills and using their banks online services, this segment also engaged in online funds/bonds and buying online products. The low income group (up to Rs. 15k) pays bills online (16%), orders food online and uses their bank's online services.

Table 4.19b: Frequency of internet usage for financial transactions – income up to PKR 15,000



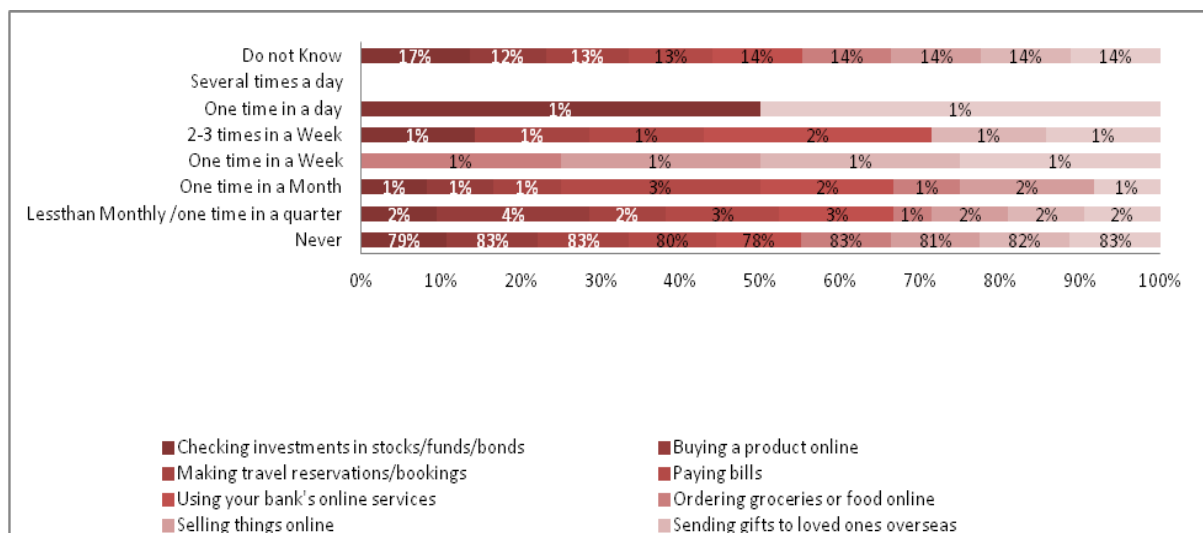
Since respondents were not actively engaged in e-commerce, the low income group paid bills online (9%) and logged on to their online bank (4%) account once in a month.

Table 4.19c: Frequency of internet usage for financial transactions – income PKR 15,001 to 30,000



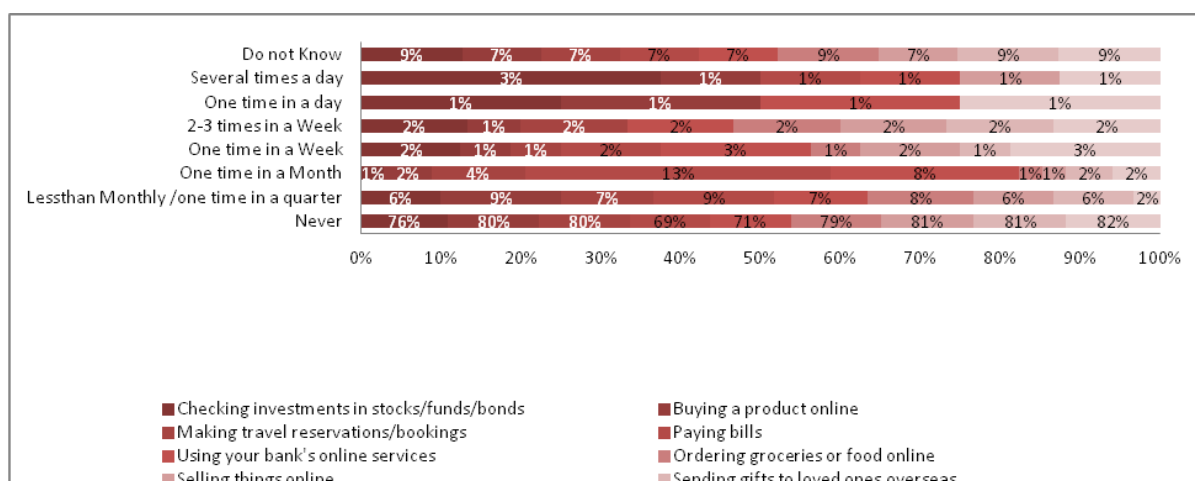
The middle income group has similar frequencies in e-commerce as they paid bills online (5%) and logged on to their online bank (3%) account once in a month.

Table 4.19d: Frequency of internet usage for financial transactions – income PKR 30,001 to 50,000



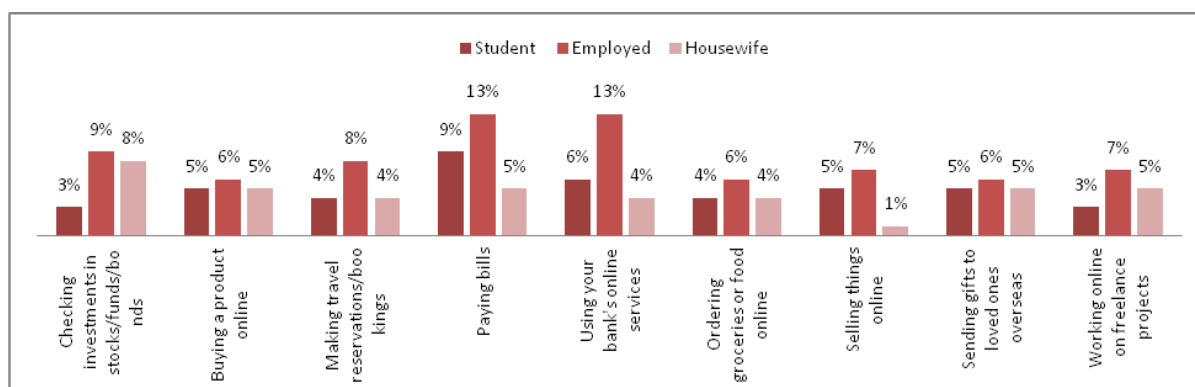
Middle to high income group was the least active group and has very low frequencies for all e-commerce activities including paying bills (3%).

Table 4.19e: Frequency of internet usage for financial transactions – income exceeding PKR 50,000



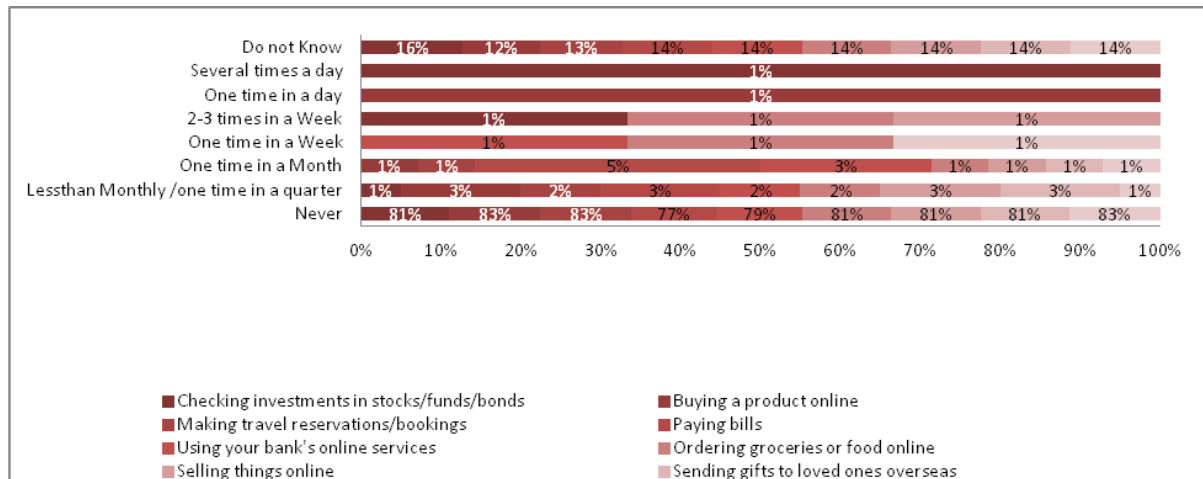
Highest income group was the most active participant of e-commerce activities. 4% of the users from this income group engaged in checking investments in stocks/funds/bonds on a daily as well as weekly basis. The famous monthly activity was paying bills (13%), whereas online banking and freelance projects got some share in weekly frequencies (5%).

Table 4.20a: Overall usage of internet for financial transactions, by life stage



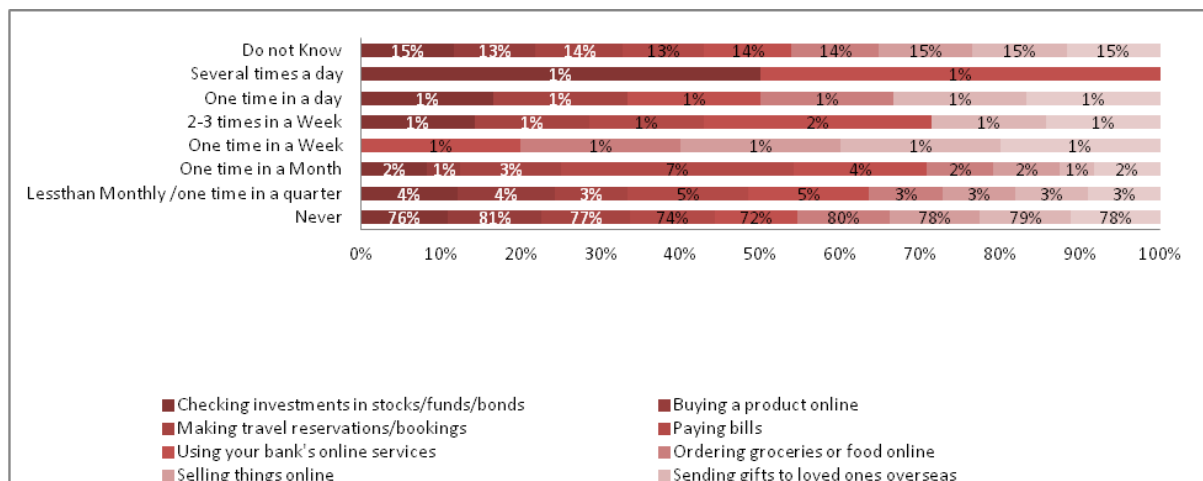
Users with the largest buying power, the employed, are the ones who are most actively engaged in e-commerce. Housewives, refreshingly, were as active as students in e-commerce – surpassing them in finding freelance projects online and in investing online.

Table 4.20b: Frequency of internet usage for financial transactions – student



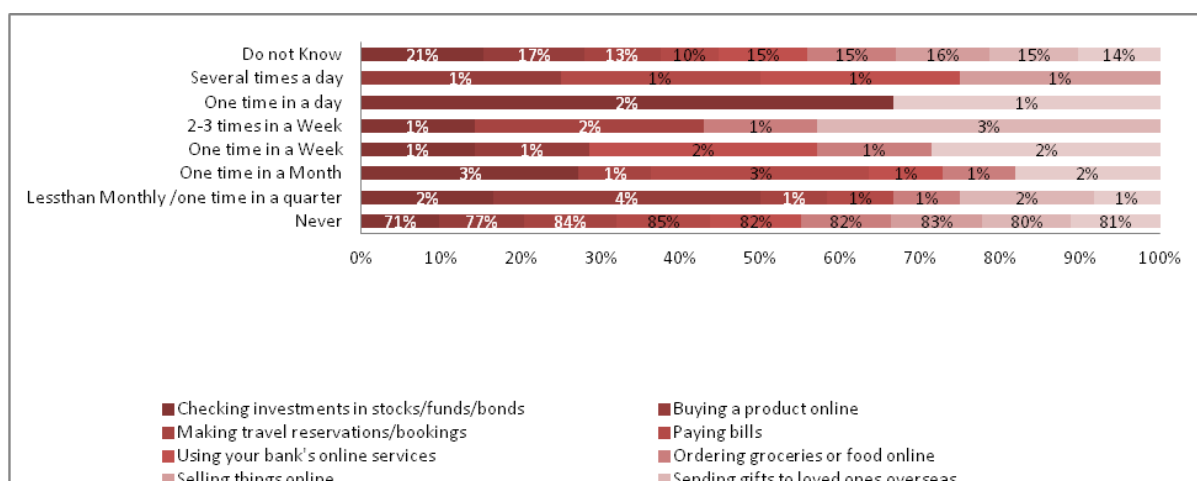
Students did not participate well in e-commerce as they just paid bills (5%) and used online banking service (3%) once in a month. 3% of them claimed purchasing online once in a quarter.

Table 4.20c: Frequency of internet usage for financial transactions – employed



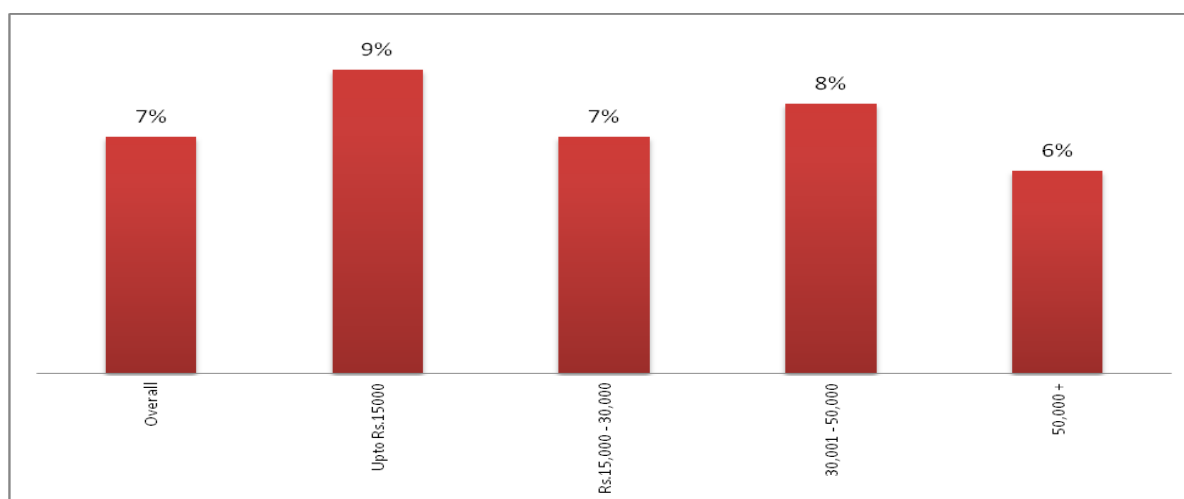
The employed group was somewhat active although with minor participation in daily e-commerce activities. However, some of them claimed weekly participation in online banking(3%), freelance projects(2%) and sending gifts to loved ones overseas (2%). 7% of them paid monthly bills via online.

Table 4.20d: Frequency of internet usage for financial transactions – housewife



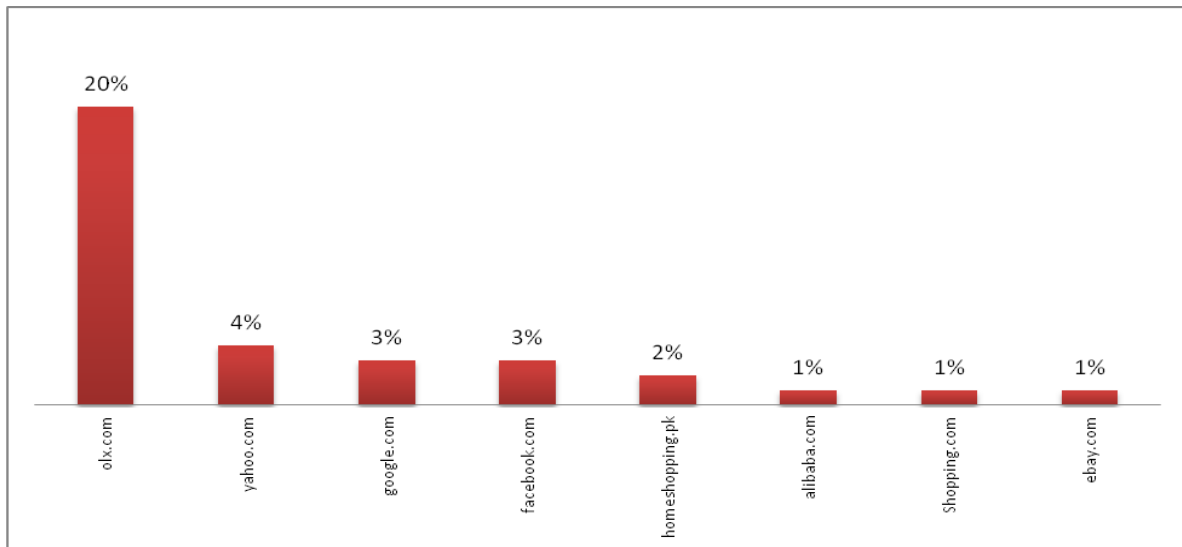
Housewives tried to accommodate themselves in e-commerce but their participation was minimal. However, 2% of them claimed to check investments on daily basis. Their weekly participation in sending gifts to loved ones overseas was 3% and buying online products was 4% in each quarter.

Table 4.21: Savings and discounts through online shopping, by income



Surprisingly the lower income group perceived saving money while doing online shopping vs. other groups.

Table 4.22: Most commonly used online shopping website (Top 3), overall



Most respondents think of olx.com.pk as an online shopping destination (despite the fact that it is not technically an “online shopping” website as much as it is a local version of craigslist).

Table 4.23a: Online shopping: Local vs international websites

Base: Those Urban respondents who bought a product online (n=89)

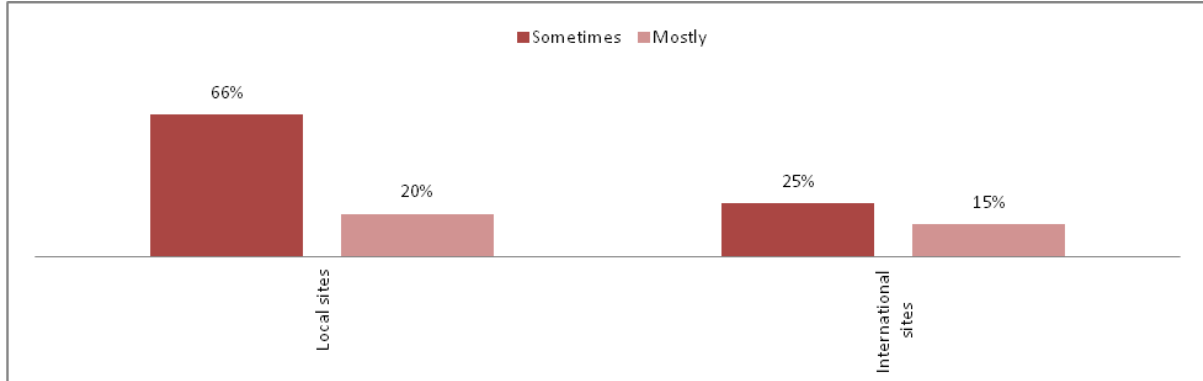
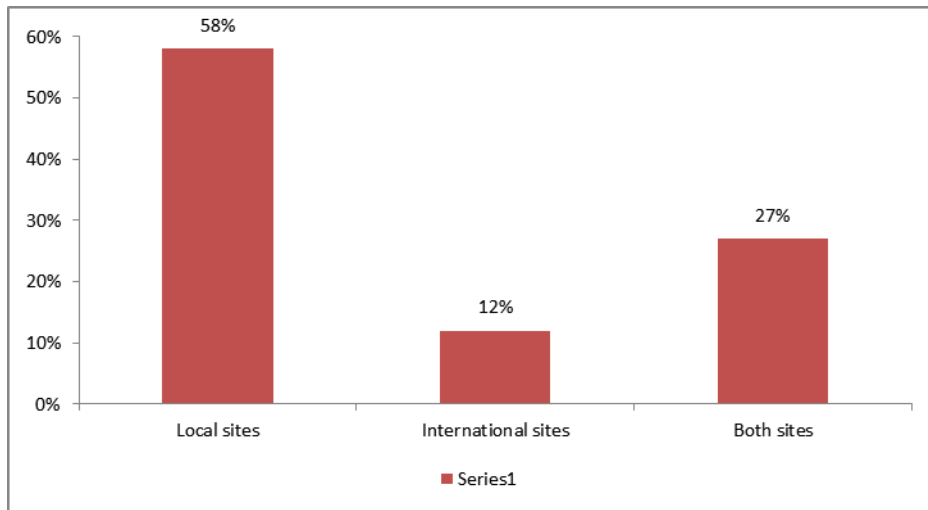


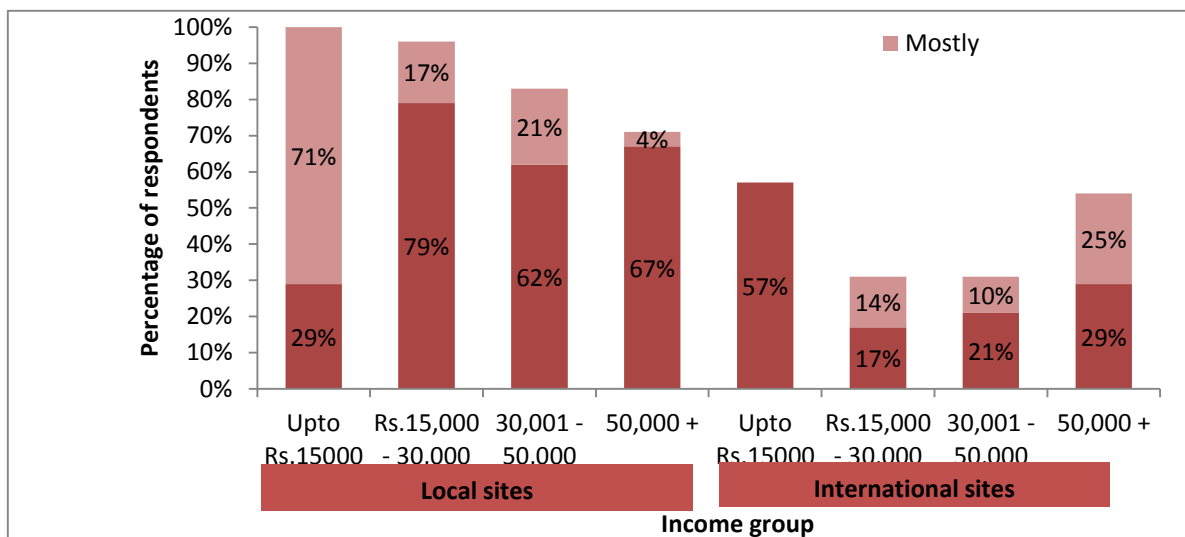
Table 4.23b: Online shopping: Local vs international websites



Those who purchased something online perceived that mostly their purchase was through local sites [Fig 4.23a – Fig 4.23b].

Table 4.24: Online shopping through local and/or international websites, by income

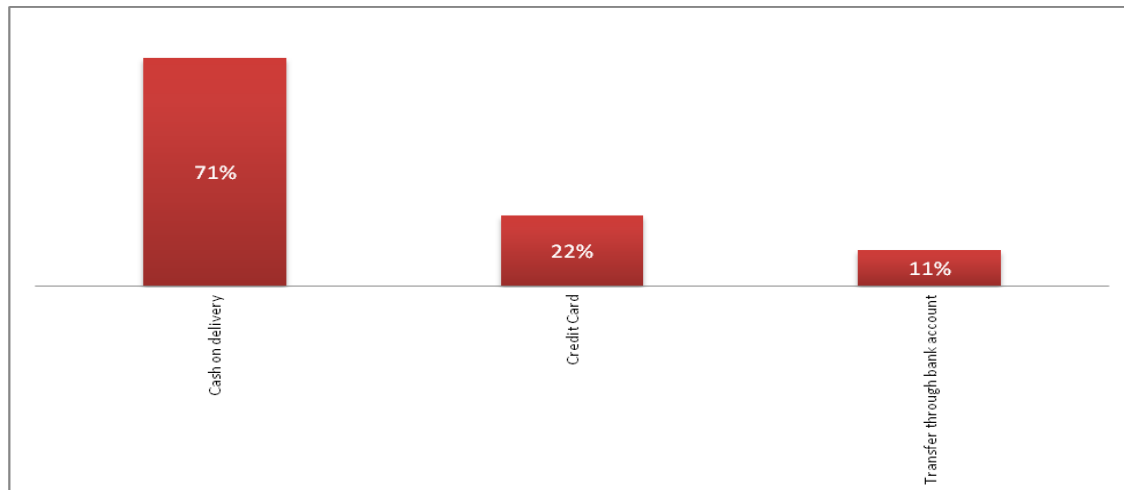
Base: Those Urban respondents who bought a product online (n=89)



All income groups had a consensus on online purchasing via local sites except those who were earning more than 50k who believed that they purchased from international sites. (25%)

Table 4.25: Modes of payment used for online shopping

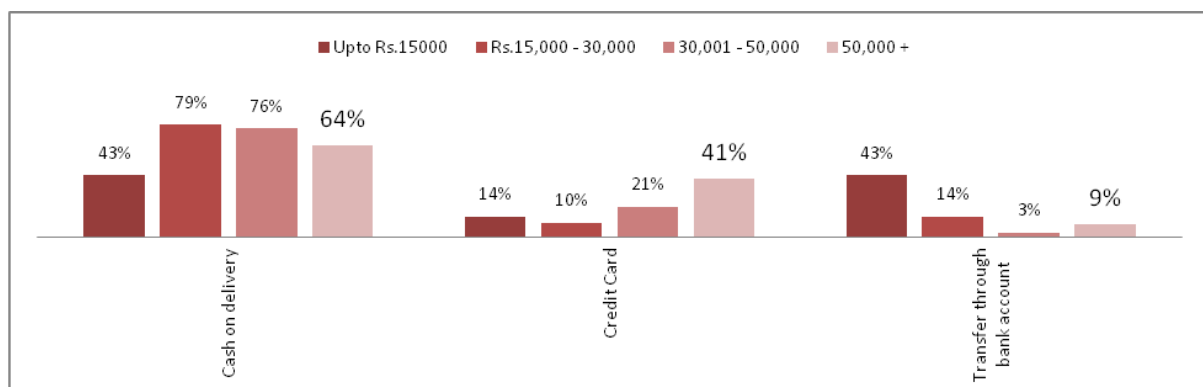
Base: Those Urban respondents who bought a product frequently (n=87)



Cash on delivery (71%) was chosen by online buyers as it is more convenient and reliable than other online payment methods.

Table 4.26: Modes of payment used for online shopping, by income

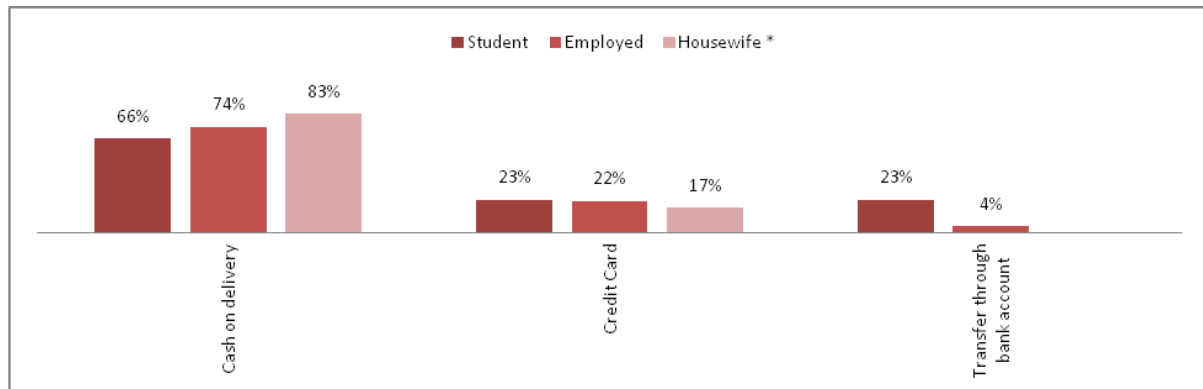
Base: Those Urban respondents who bought a product frequently (n=87)



High income groups showed less of a preference towards cash on delivery vs. other income groups and were also willing to checkout online using their credit cards (41%). The lowest income group equally trusted cash on delivery and payment via bank transfers (43%).

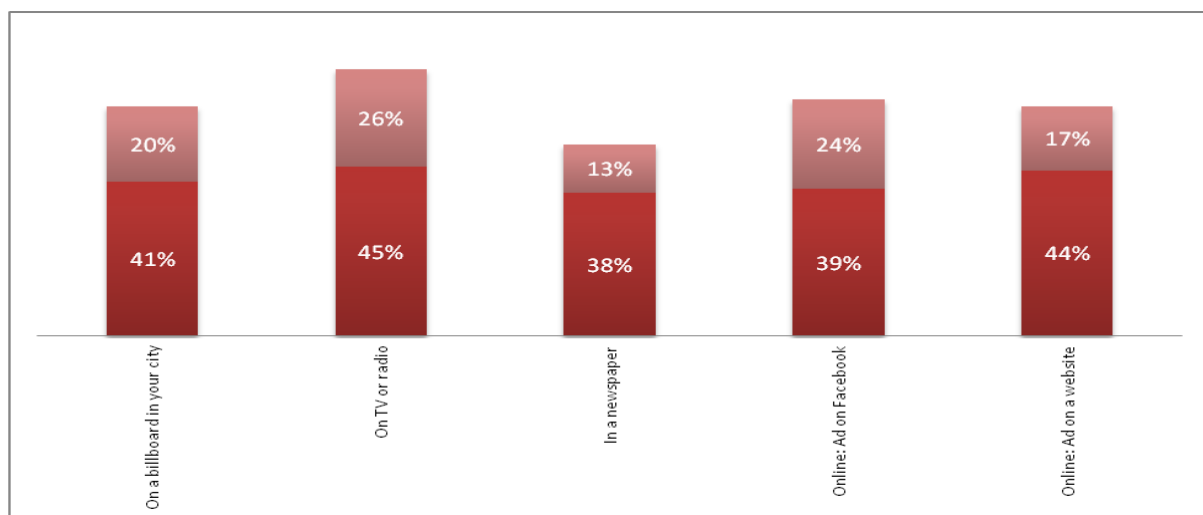
Table 4.27: Modes of payment used for online shopping, by life stage

Base: Those Urban respondents who bought a product frequently (n=87)



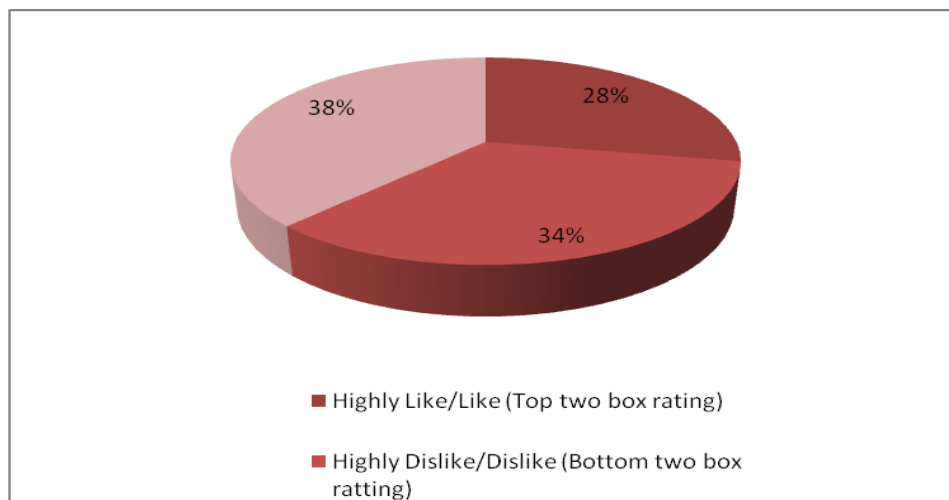
Housewives (83%) were more likely to use cash on delivery method than students and employed users. However, students equally preferred bank transfer and credit card (23%).

Table 4.28: Recall of ads on various media



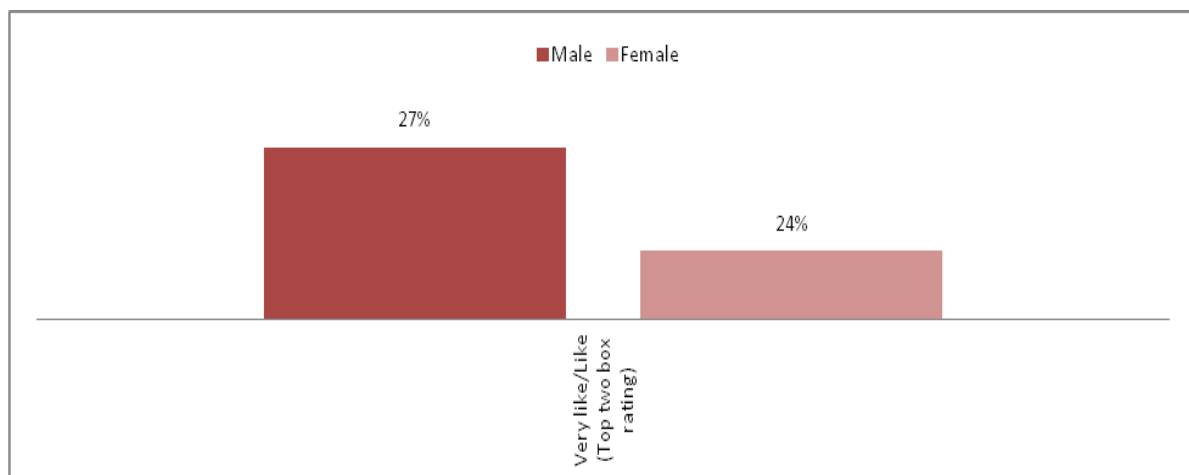
Surprisingly, after TV, respondents remembered Facebook ads more than they remembered ads on billboards (24% vs. 20%). If investigated further, this fact could have great implications for redistribution of advertising budgets.

Table 4.29: Attitude towards online advertising



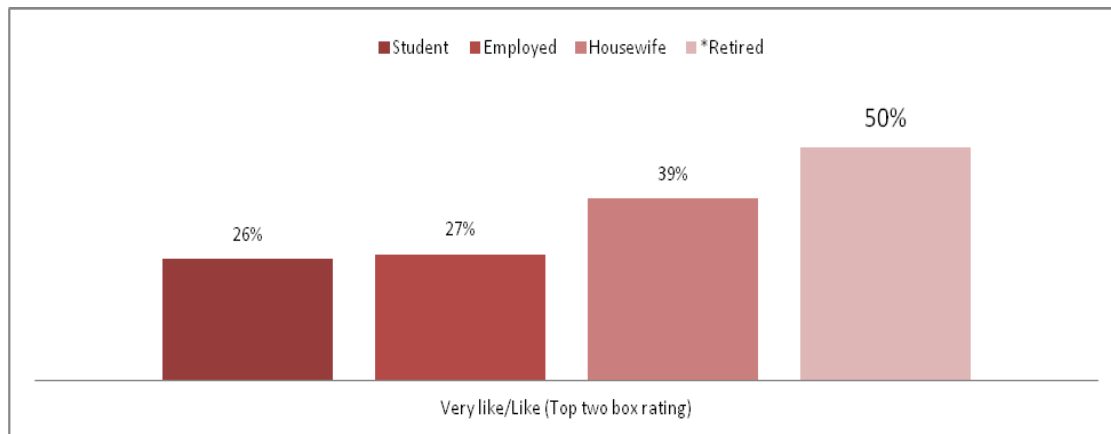
The views of internet users were split when they were asked about online advertising. More than one third (34%) disliked this mode of advertising, 28% liked it and 38% were indifferent.

Table 4.30: Attitude: liking, towards online advertising, by gender



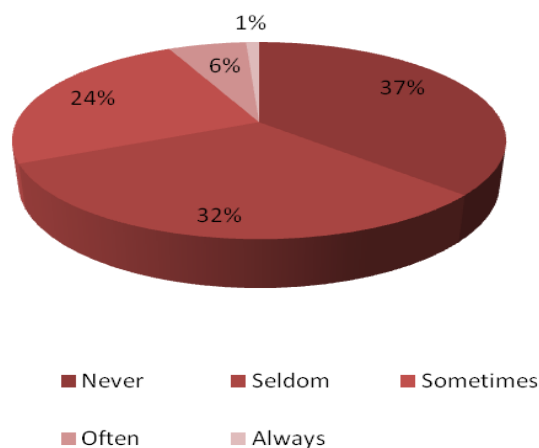
Men are more inclined towards online advertising as compared to women (27% vs. 24%).

Table 4.31: Attitude: liking, towards online advertising, by life stage



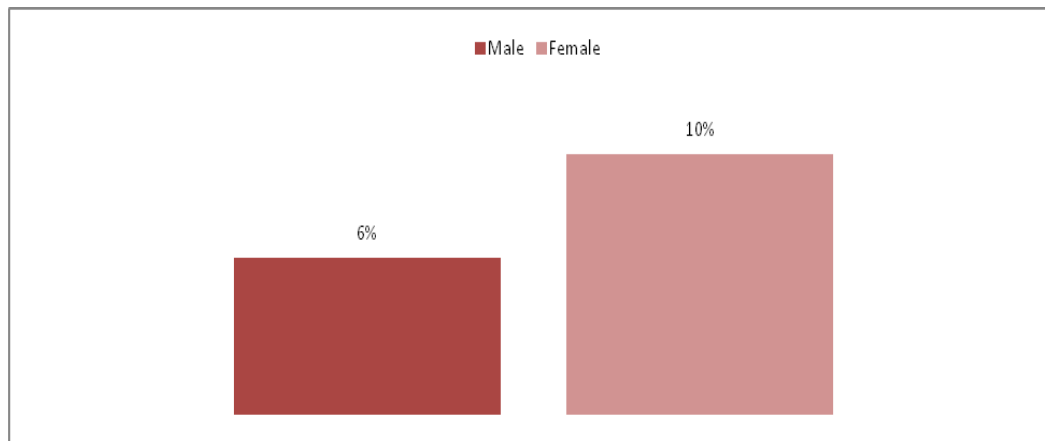
Since women accessories have been heavily advertised on the internet, therefore more than one third of the housewife users (39%) gave the highest ratings to online advertising. Students and employed users gave unanimous responses for the same (27% vs. 26%).

Table 4.32: How often respondents are influenced by online advertising, while buying



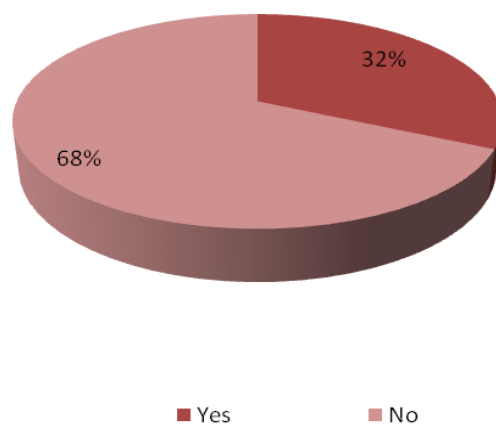
More than two thirds (67%) of internet users didn't take notice of online advertising and did their shopping independently. However, 31% of the users said that online advertising did impact their purchase behaviour.

Table 4.33: Respondents who often use online advertising to make purchase decisions, by gender



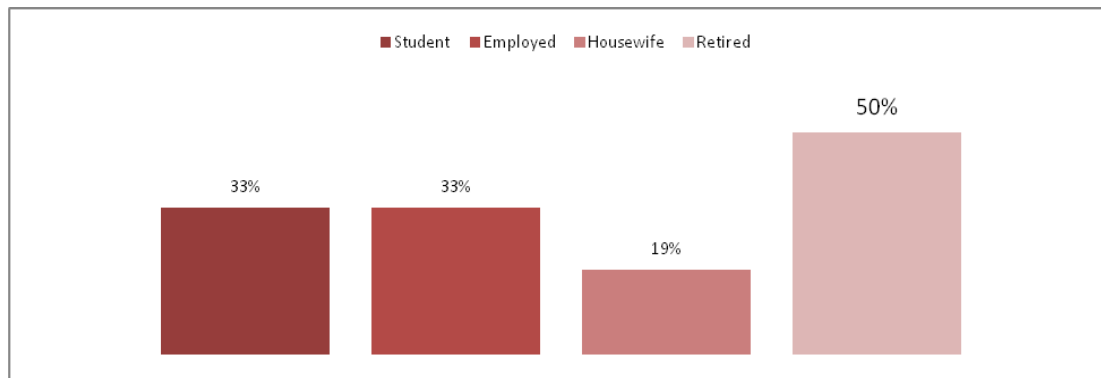
The reported impact of online advertising in taking purchase decisions was quite low among both genders. However, females were more influenced by online ads while making purchases (10% vs. 6%).

Table 4.34: Have you ever clicked on an online ad?



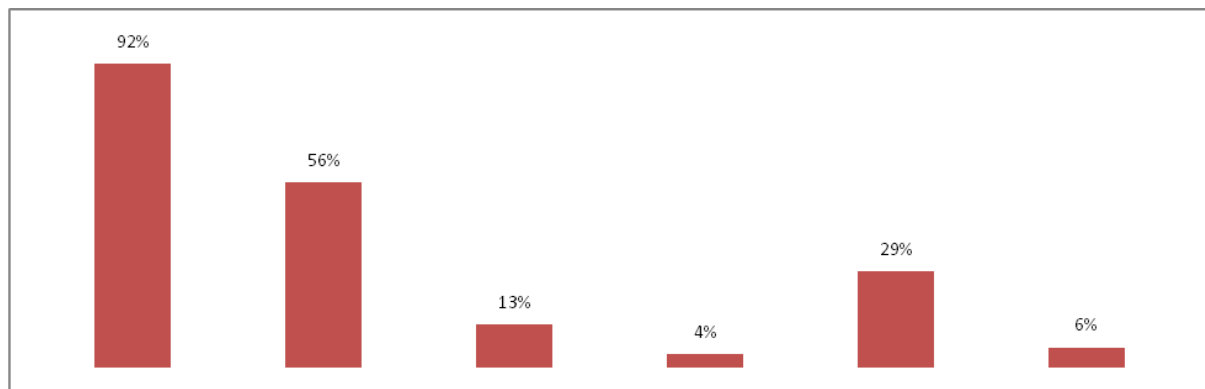
An encouraging 32% of users claimed that they had clicked on an online ad. This is much higher than the click-through rate achieved by most online ad campaigns – between 6% - 12%.

Table 4.35: Clicks on online ads, by life stage



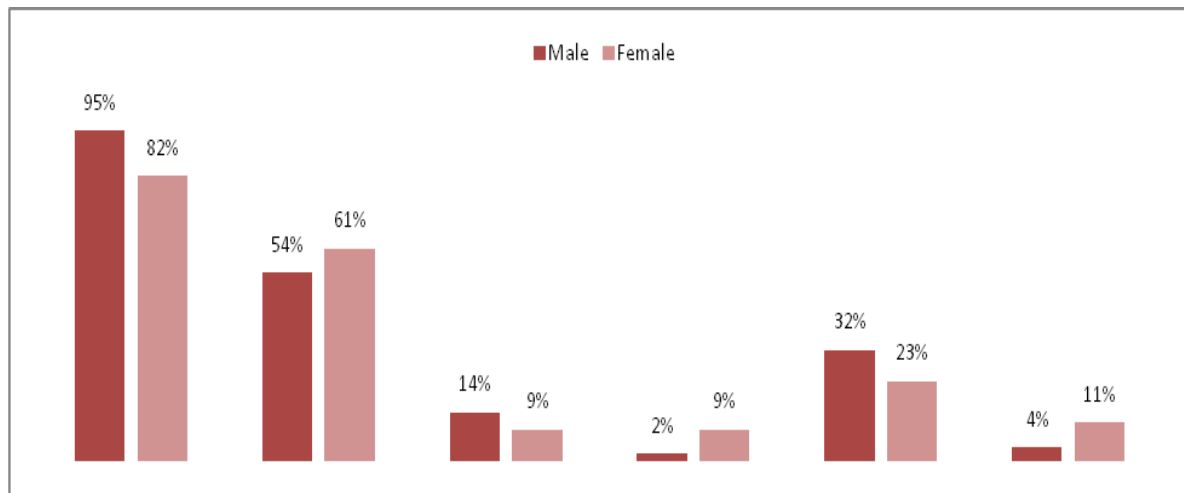
CTR for online advertising was equal among students and employed users and very high as reported by retired users.

Table 4.36: Websites where online ads are seen the most



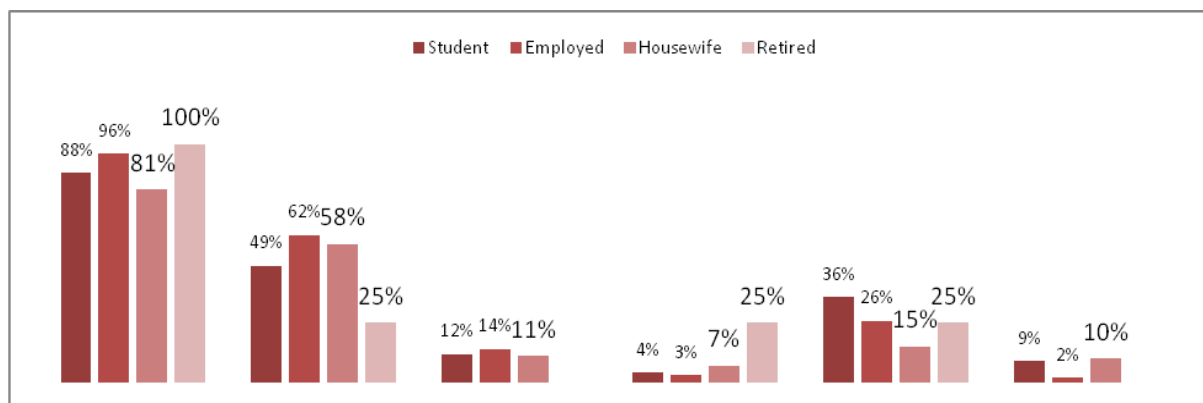
Most users remembered seeing online ads on Facebook (92%), followed by sponsored ads in Google search results (56%).

Table 4.37: Websites where online ads are seen the most, by gender



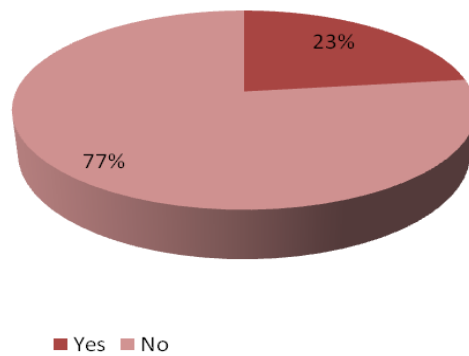
Females reported seeing ads in Google search results more than males, whereas more males reported seeing Facebook ads.

Table 4.38: Websites where online ads are seen the most, by life stage



Students seemed less likely to remember Google search results than other life stage groups.

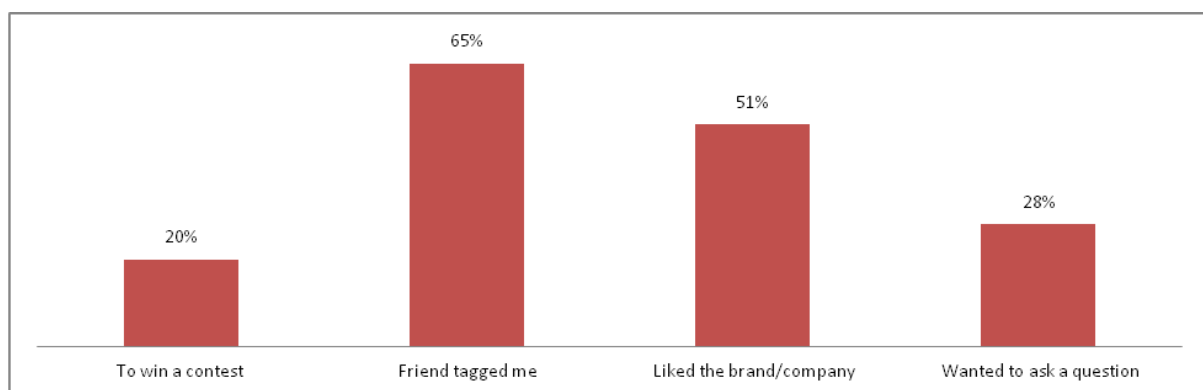
Table 4.39: Have you ever joined a brand/ company's Facebook page?



The incidence of joining Facebook pages for any company or brands was less than one fourth (23%).

Table 4.40: Reasons for joining a brand/ company's Facebook page

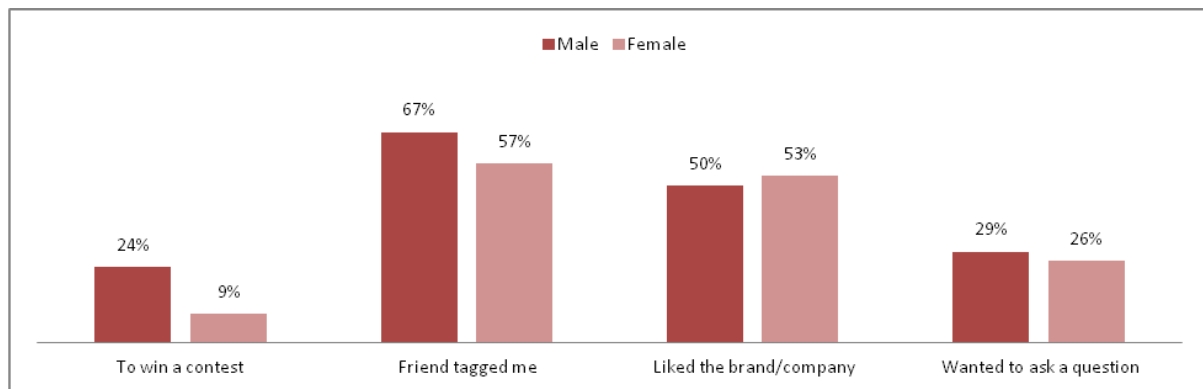
BASE: Those Urban Respondents who joined a company or brand page on facebook (n=344)



Since Facebook plays the role of a hub between friends and family, users who joined a Facebook page mentioned being tagged by friends (65%) as a more common reason vs. liking the company/brand (51%).

Table 4.41: Reasons for joining a brand/ company's Facebook page, by gender

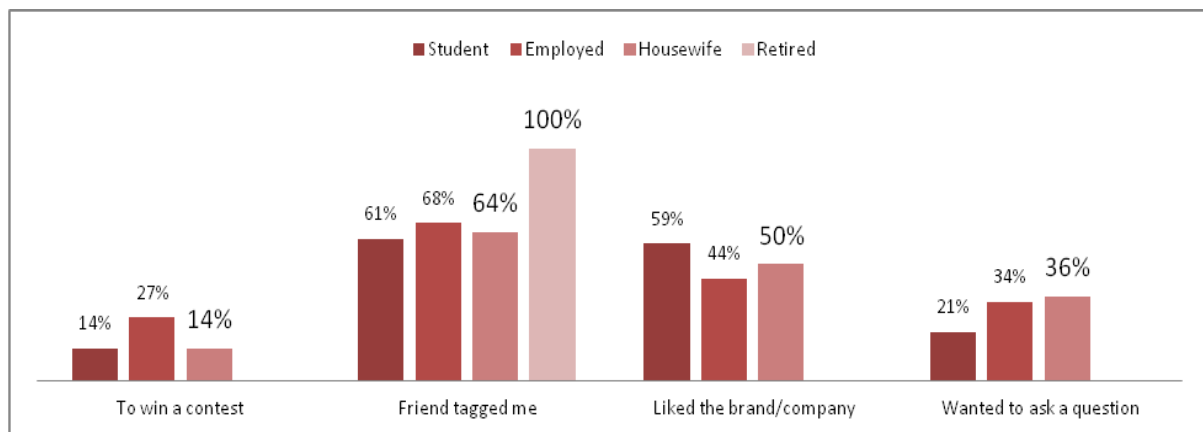
BASE: Those Urban Respondents who joined a company or brand page on facebook (n=344)



Females seem more likely to join a Facebook page out of interest in the brand vs. males, who seem more inclined to join pages if tagged by friends.

Table 4.42: Reasons for joining a brand/ company's Facebook page, by life stage

BASE: Those Urban Respondents who joined a company or brand page on Facebook (n=344)

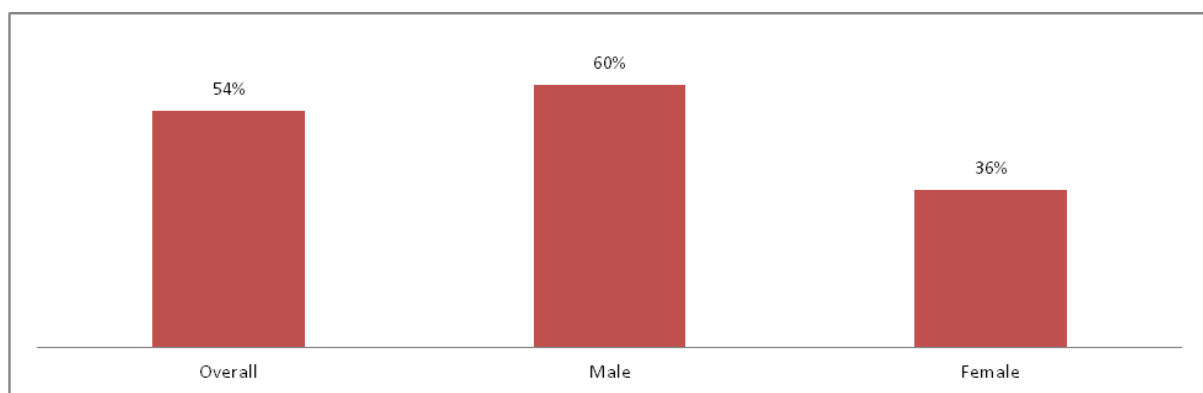


Employed persons seem more inclined towards participating in facebook contests, and less inclined to join a facebook page out of mere interest in a company/brand.

Usage (job searches)

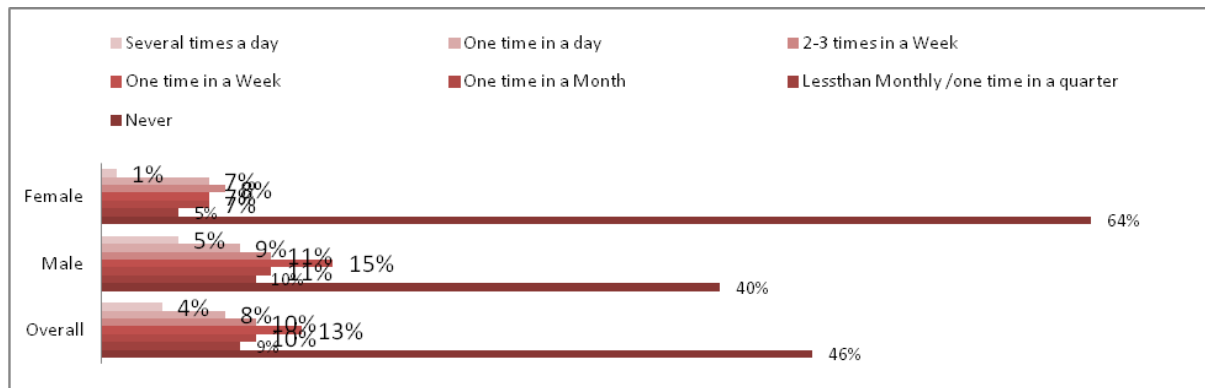
Formal or regular employment is highly prized in Pakistan, and this is reflected in the high numbers (54%) of users who report using Net access for job searches. The fulfillment aspect is a little disturbing, though, because just 12% report having found jobs using online services. This success rate is slightly higher for men than for women though. Persons in higher income brackets are more likely to find suitable jobs, but conversely, are less likely to use job search online. We asked about freelancing, but found that both incidence of search and success was very low.

Table 4.43a: Overall and gender-wise usage of internet for job seeking



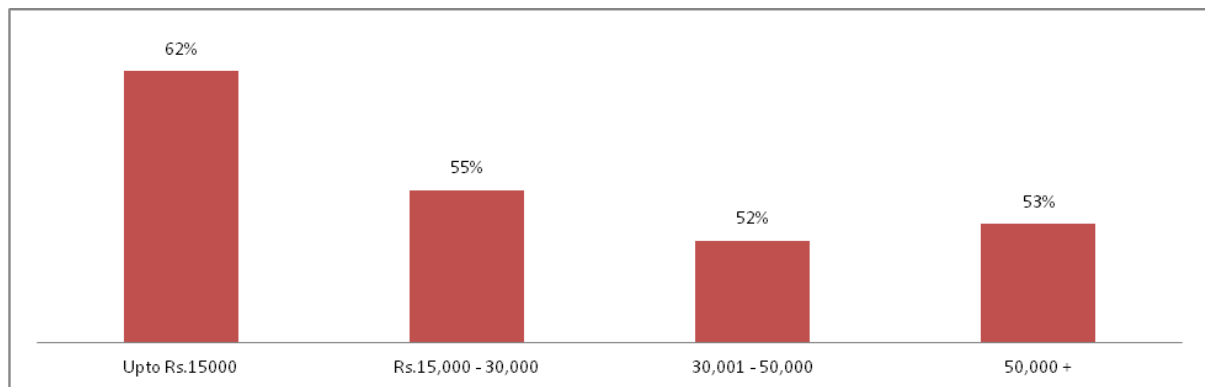
Overall more than half of the internet users searched jobs online (54%). However, male users were dominant in this activity.

Table 4.43b: Overall and gender-wise frequency of online job seeking



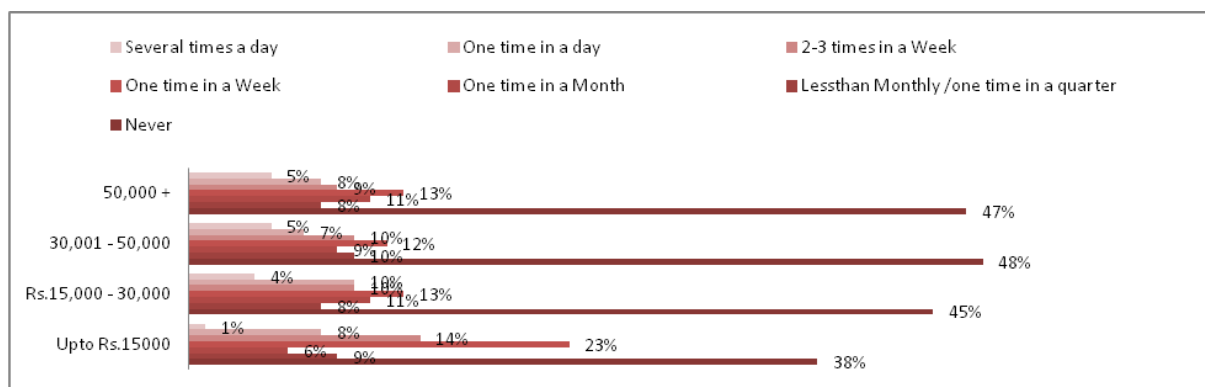
23% of internet users searched jobs online on a weekly basis. Males searched it more anxiously with a daily share as 14%. More than two third of the female internet users (64%) didn't find jobs via internet.

Table 4.44a: Usage of internet for job seeking, by income



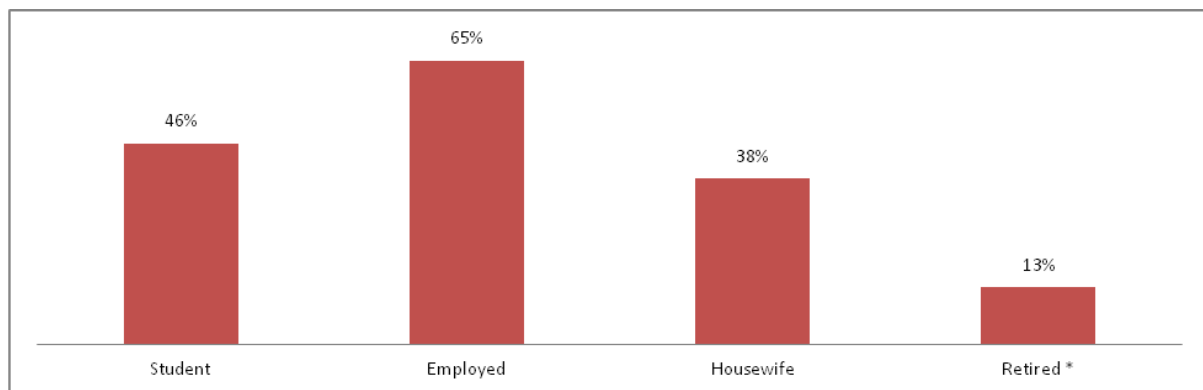
Lower income groups were more likely to search for jobs online vs. other income groups.

Table 4.44b: frequency of online job seeking, by income



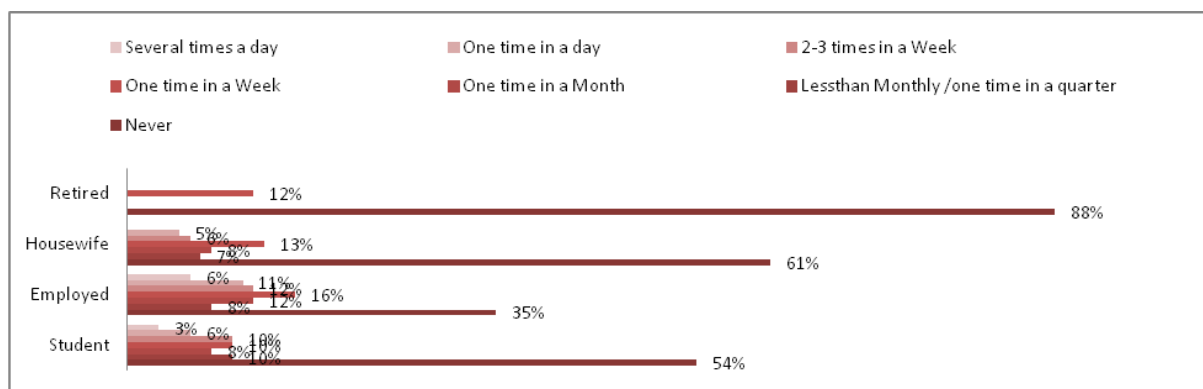
The daily share of online job searching was high for middle income group (14%) followed by very high income group (13%). However, lower income group has the highest weekly share of job searching via internet (37%).

Table 4.45a: Usage of internet for job seeking, by life stage



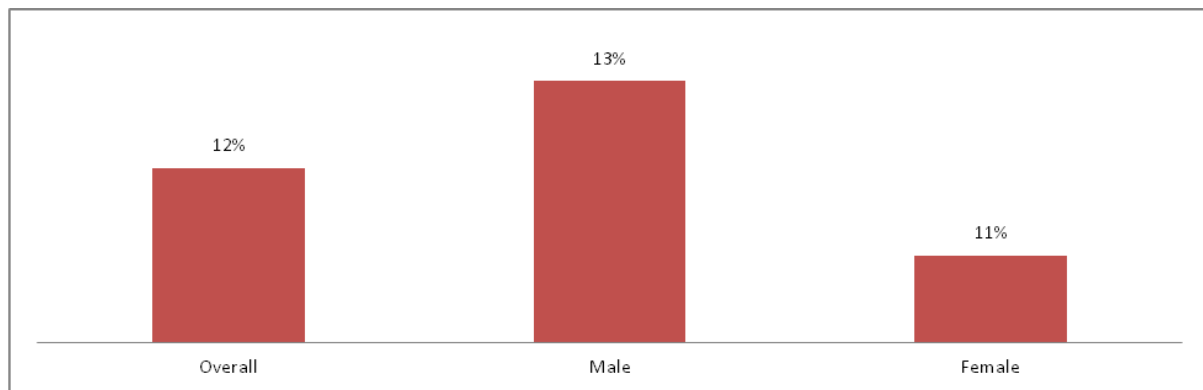
The employed group (65%) seemed to be more career oriented than students as they actively search for jobs on the internet. An encouraging 38% of housewives also searched for online jobs (38%).

Table 4.45b: frequency of online job seeking, by life stage



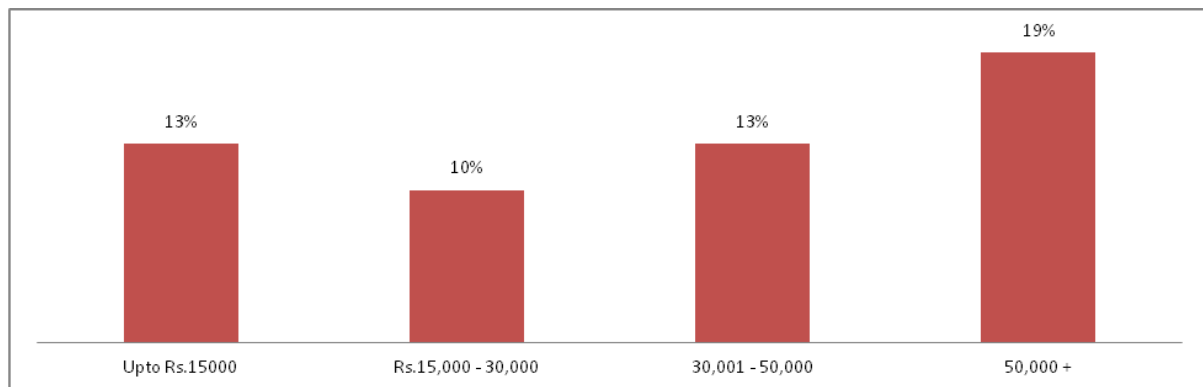
The employed segment got the highest frequencies of online job searching on a daily (17%) and weekly basis (28%).

Table 4.46: Effectiveness of internet usage: Respondents who found jobs via internet



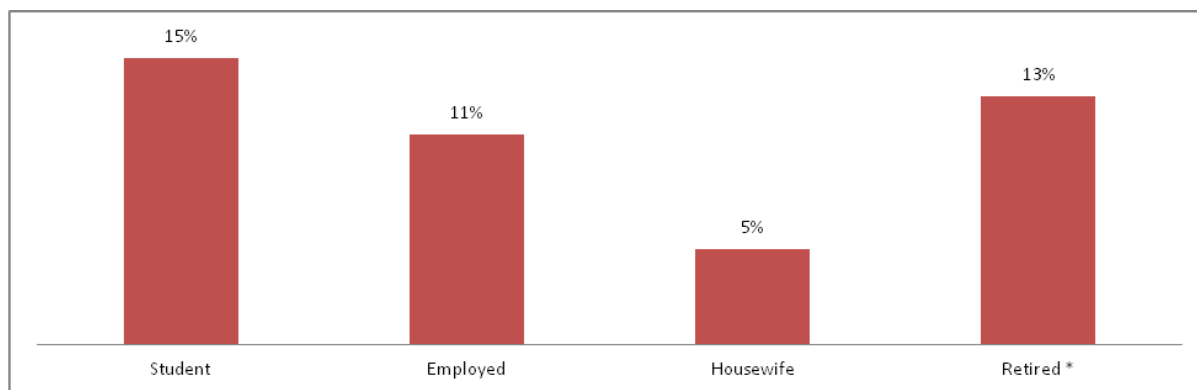
More than half of the internet users searched jobs through internet and the overall success rate of finding jobs was 12%. This rate was slightly better for males than females (13% vs. 11%).

Table 4.47: Effectiveness of internet usage: Respondents who found jobs via internet, by income



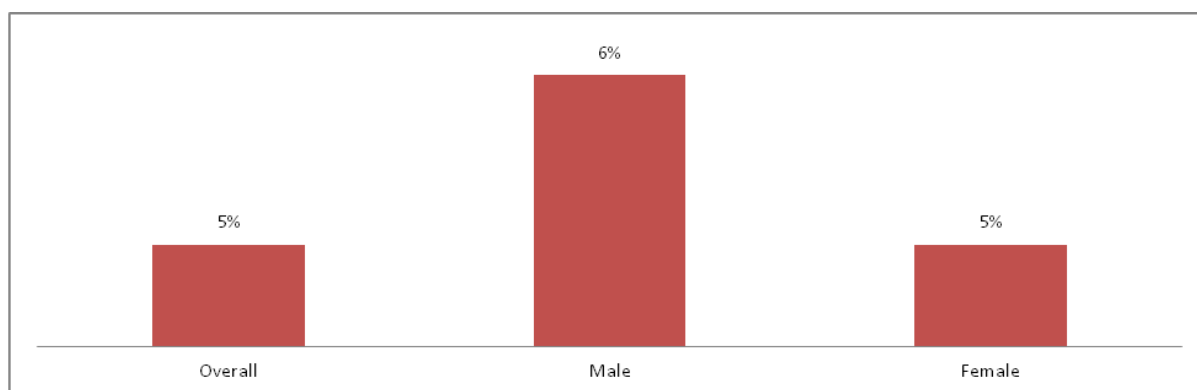
Although there were less people from 50k+income groups who searched for jobs online as compared to lower income groups but success rate for getting jobs via internet was more productive for higher income groups.

Table 4.48: Effectiveness of internet usage: Respondents who found jobs via internet, by life stage



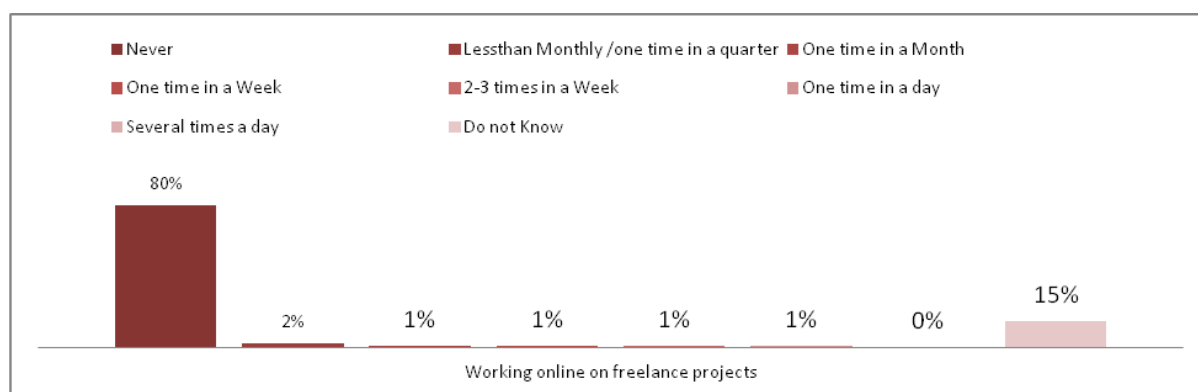
The rate of success for getting jobs via internet was more productive for students than employed users (15% vs. 11%). Although more than one third of the housewives searched for jobs online but their success rate seemed to be low.

Table4.49: Freelance projects undertaken within the last year, overall and gender-wise



The incidence of gaining freelance projects via the internet was quite low (5%).

Table 4.50: Frequency of freelance projects undertaken within the last year, overall



Majority of the users (80%) never connected to the internet for working on freelance projects. Only 3% of the users claimed to do it on either quarterly or monthly basis.

Table 4.51: Frequency of freelance projects undertaken within the last year – male

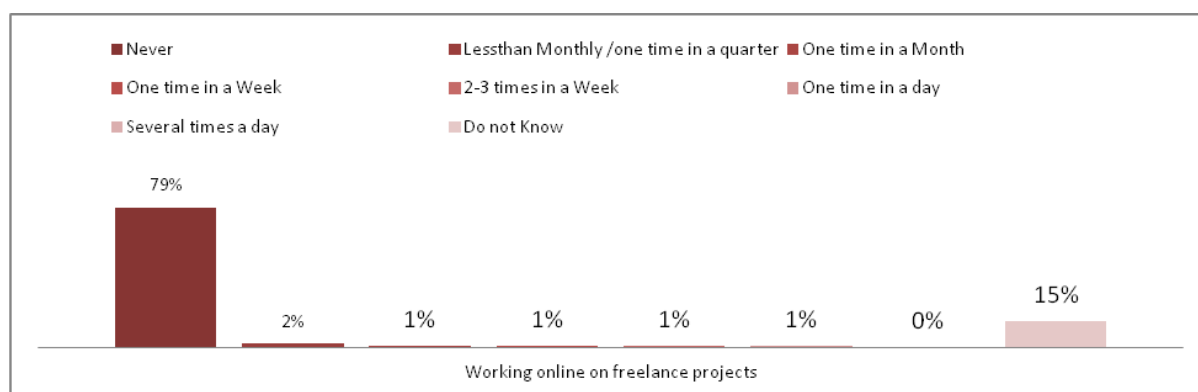
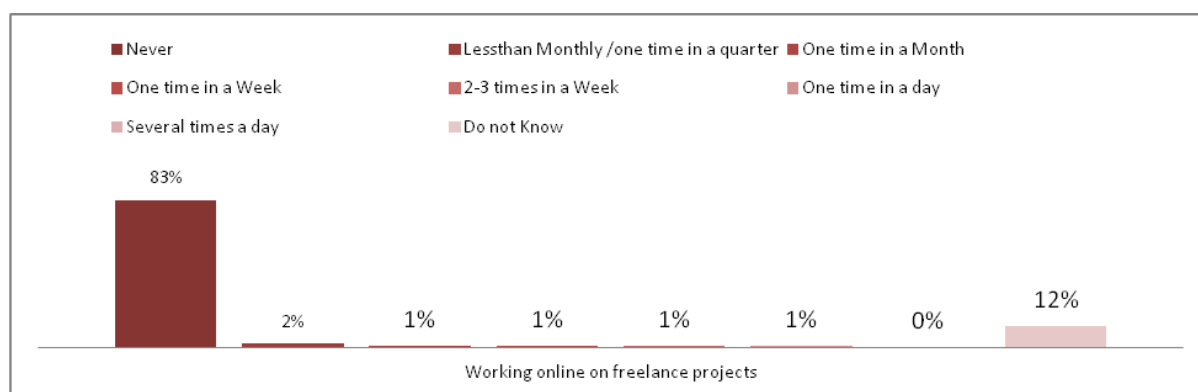
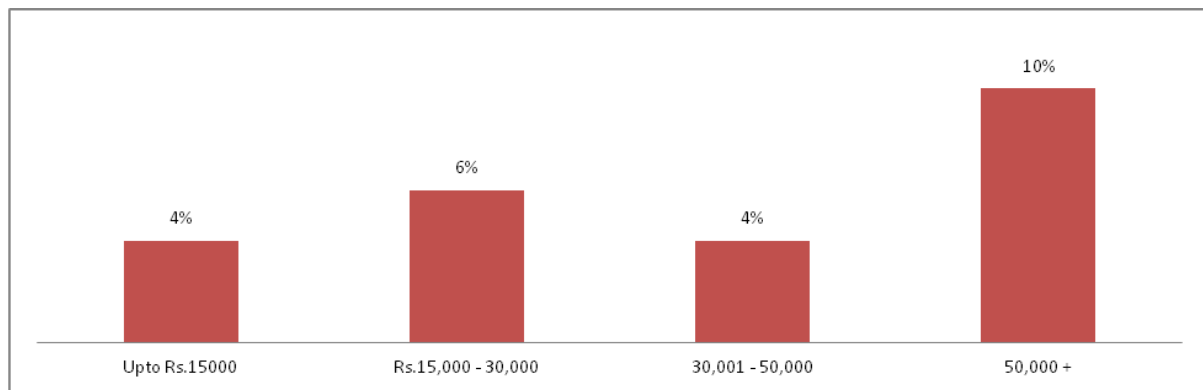


Table 4.52: Frequency of freelance projects undertaken within the last year – female



The frequencies of working on freelance projects were equal for both genders. 3% from each gender worked freelance once in a quarter or month. [Fig 4.51 and Fig 4.52]

Table 4.53: Freelance projects undertaken within the last year, by income



The income groups showed little variation for experience with freelance projects via the internet. Those earning more than 50k+ were more experienced than other groups.

Table 4.54: Frequency of freelance projects undertaken within the last year – income up to PKR 15,000

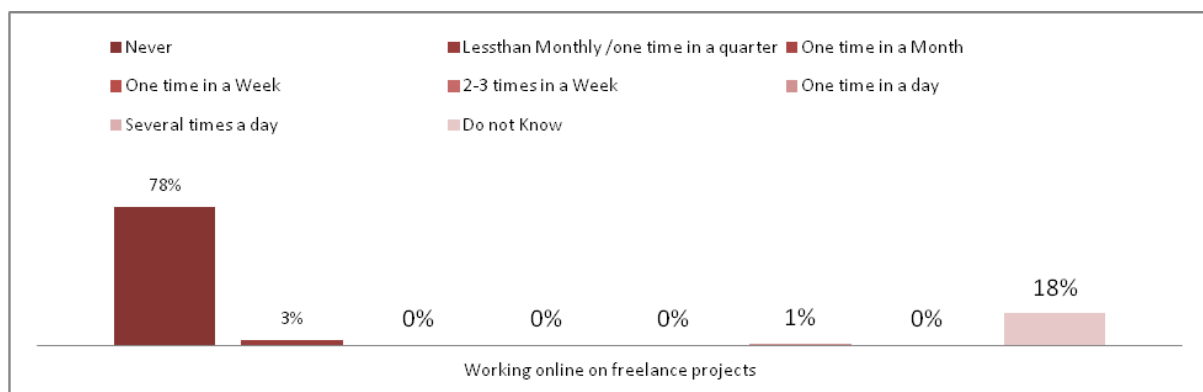


Table 4.55: Frequency of freelance projects undertaken within the last year – income PKR 15,001 to 30,000

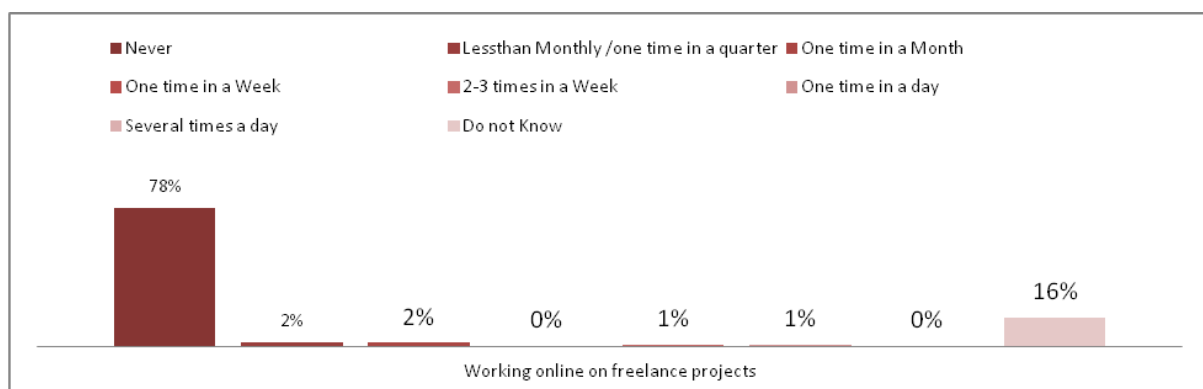
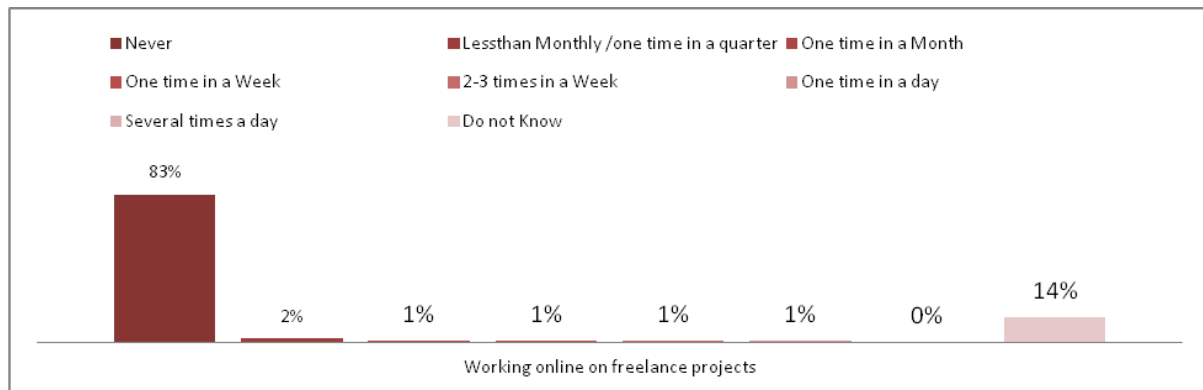
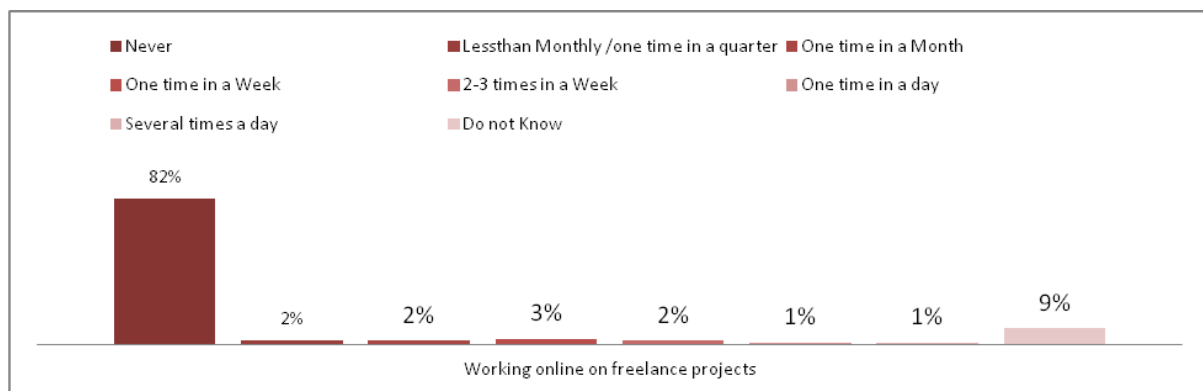


Table 4.56: Frequency of freelance projects undertaken within the last year – income PKR 30,001 to 50,000



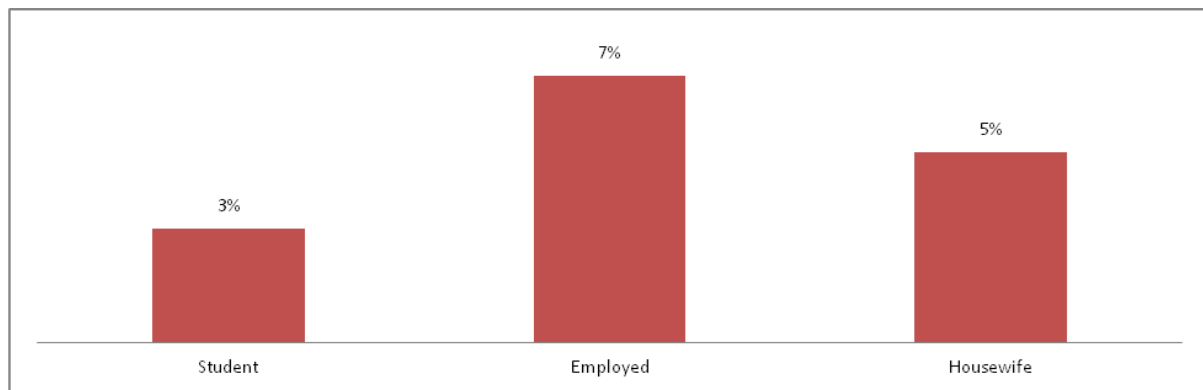
All groups except very high income group got the same working frequencies on freelance projects. It is 3% either for monthly or quarterly basis. [Fig 5.4-Fig 5.6]

Table 4.57: Frequency of freelance projects undertaken within the last year – income above PKR 50,000



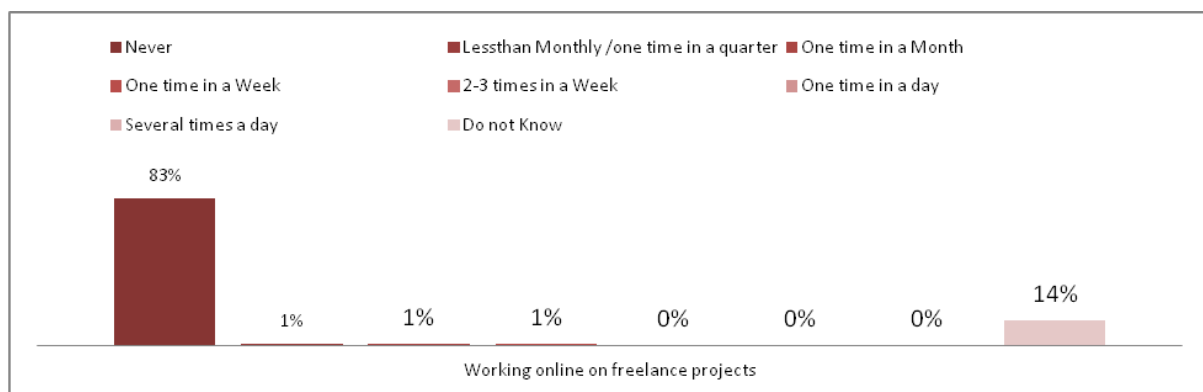
The income group earning more than PKR 50,000 per month got weekly opportunities to work on freelance online projects as 3% of them claimed this. The other 4% shared the frequency as once in a quarter or in a month.

Table4.58: Freelance projects undertaken within the last year, by life stage



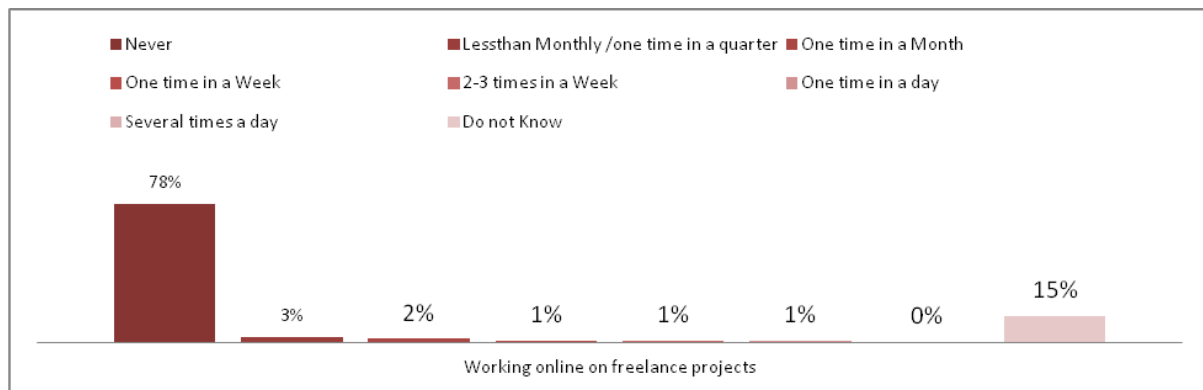
The employed users got more opportunities to work on online freelance projects as compared to students and housewives.

Table 4.59a: Frequency of freelance projects undertaken within the last year – Students



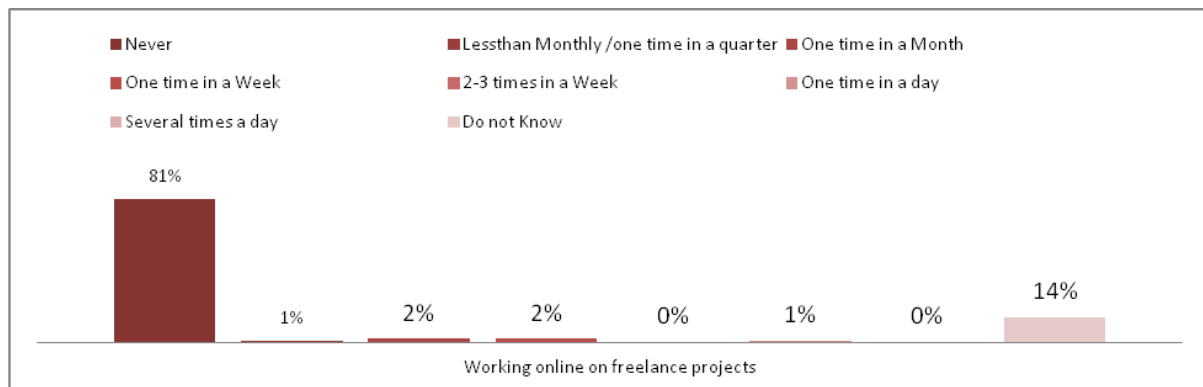
Students got the least opportunities to work on freelance online projects. Only 3% of them claimed to work on either weekly or monthly or once in a quarter.

Table 4.59b: Frequency of freelance projects undertaken within the last year – Employed



The employed group has even frequencies on a daily to weekly basis as far as working on freelance online projects is concerned. 3% claimed for quarterly projects whereas only 2% got projects once in a month.

Table 4.59c: Frequency of freelance projects undertaken within the last year – Housewives

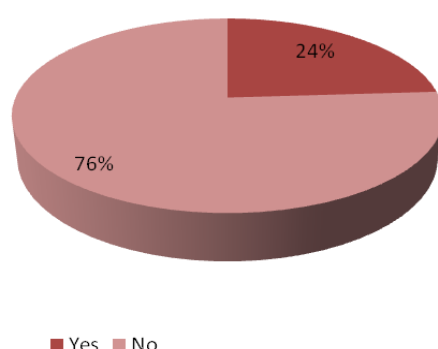


Housewives got some weekly and monthly opportunities for freelance online projects as 2% of them claimed for each period.

Usage (socio-political)

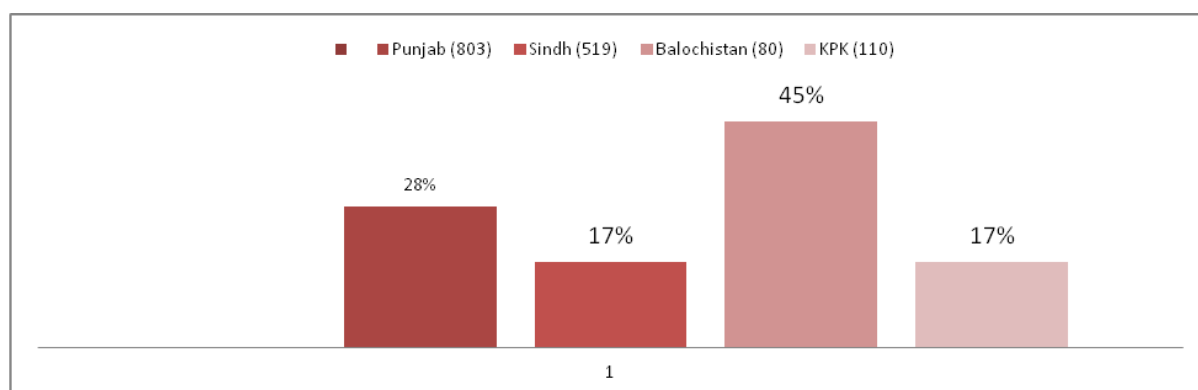
Our purpose in exploring this aspect was to try and ascertain the level of engagement with current affairs amongst regular Net users. We found that about a quarter of all users reported some level of engagement, and this was skewed towards respondents in Punjab (28%), more than Sindh or KPK (both 17%). Users reported the same level of engagement (21%) with similar activities (social causes etc) offline, which is encouraging as an indication of ubiquitous adoption of electronic, digital, Internet-based communication.

Table 4.60: Have you ever engaged with people for a political or social cause?



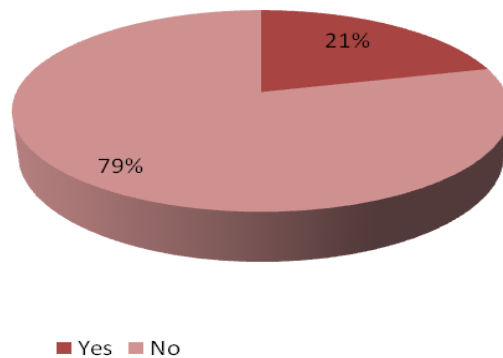
24% of internet users reported having been engaged with an offline social or political cause.

Table 4.61: Engagement with people for a political or social cause, by province



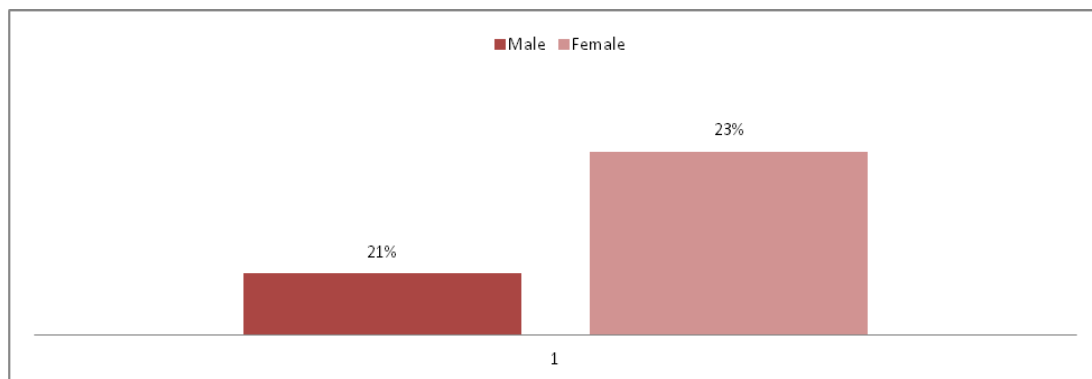
Punjab is the most active participant in social and political causes. Sindh and KPK shared equal participation for causes. Baluchistan seems to participate heavily but this could also be a sampling error due to a smaller sample size as compared to other provinces.

Table 4.62: Have you ever used the internet for engaging with people about a political or social cause?



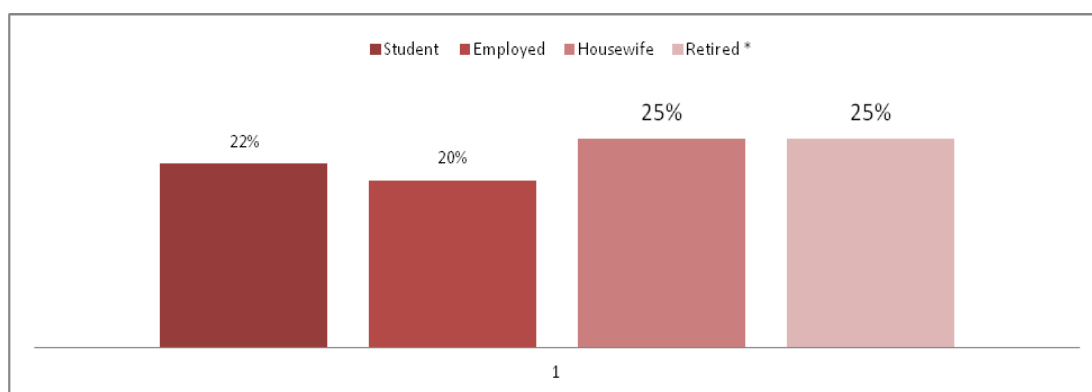
The online participation of users towards social/political cause was very similar to offline participation in such causes (24% vs. 21%).

Table 4.63: Online engagement with people for a social or political cause, by gender



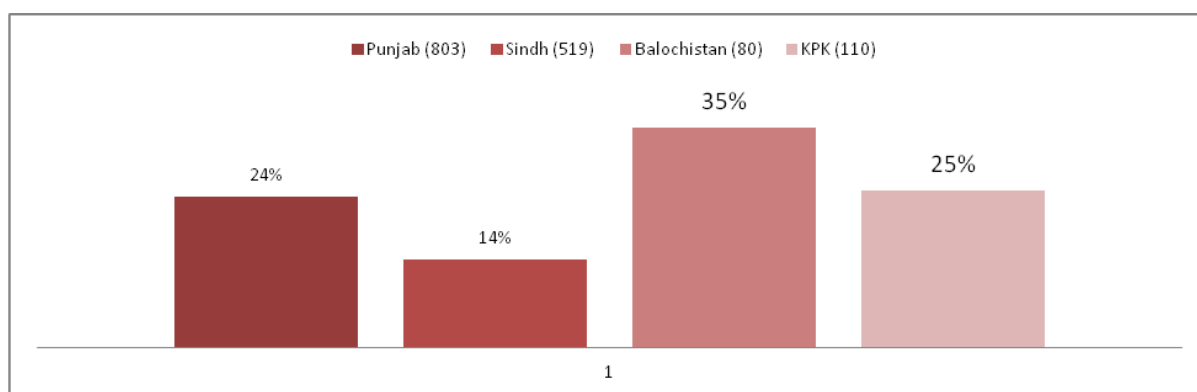
Females (23%) were more likely to engage in social/political causes via the internet than males (21%). The gender difference was equal for offline participation.

Table 4.64: Online engagement with people for a social or political cause, by life stage



Although students were less likely to participate offline but they were more willing to participate online as compared to employed users (22% vs. 20%). Housewives also took less interest in online activities as compared to what they did offline (29% vs.25%).

Table 4.65: Online engagement with people for a social or political cause, by province



The online participation for each province was lesser than offline, other than KPK where reported online participation in socio-political causes was 25% vs. 17% offline participation.

The Mobile Internet

We consider the theoretical ease of connection using mobiles to be worth exploring, in terms of its actual impact. The level of penetration of mobile users amongst Net users is 100% in urban areas, for instance, even while the actual ownership is slightly skewed towards males (96% vs 80% for women). 3/4 of all mobile users actually have access to smartphones, with Bluetooth and Wifi access, which are also capable, therefore, of use as Net devices. However, only a half of them are used for the purpose, while other (service-provider oriented) value-added services like Easy Load, Caller Tunes and Easy Paisa have their own audiences.

Most of the phones in use are relatively cheap (under PKR 10,000), and this applies across all income brackets. Even so, as many as 20% of all users reported accessing the Net daily via their mobiles. An overwhelmingly large percentage of users keep their phones nearby or on them, but within this, a quarter of the women respondents report that they do not keep their phones with them through the day.

Table 5.1: Overall mobile phone ownership

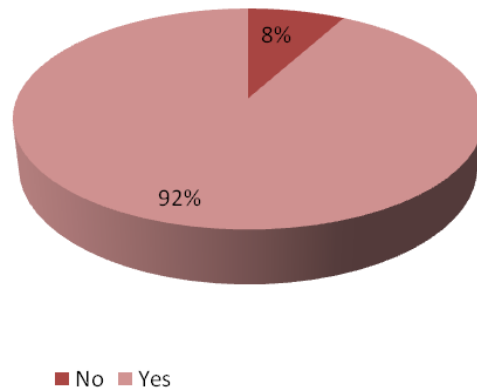
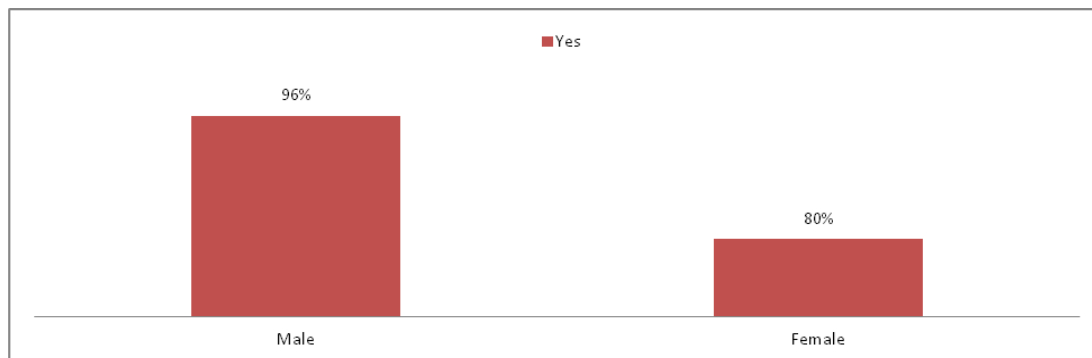
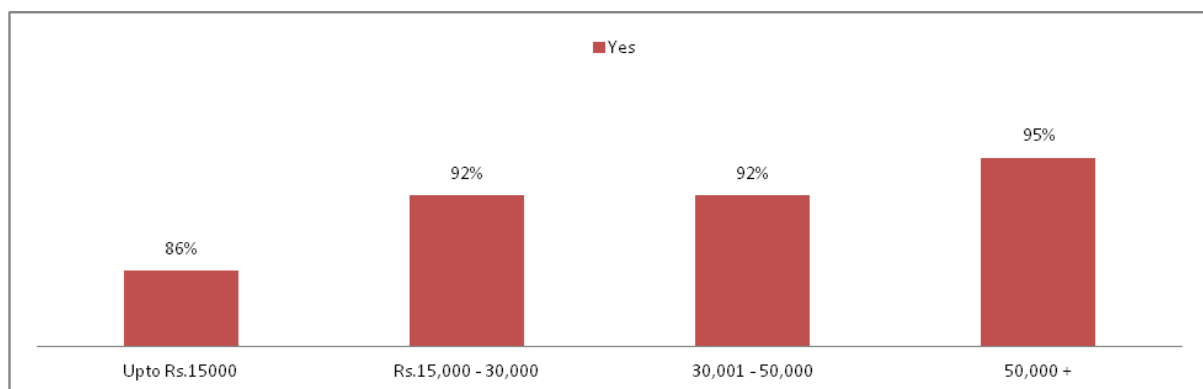


Table 5.2: Mobile phone ownership by gender



92% of all internet users use mobile phones[Fig 5.1]: 96% of males and 80% of females own a mobile phone [Fig 5.2].

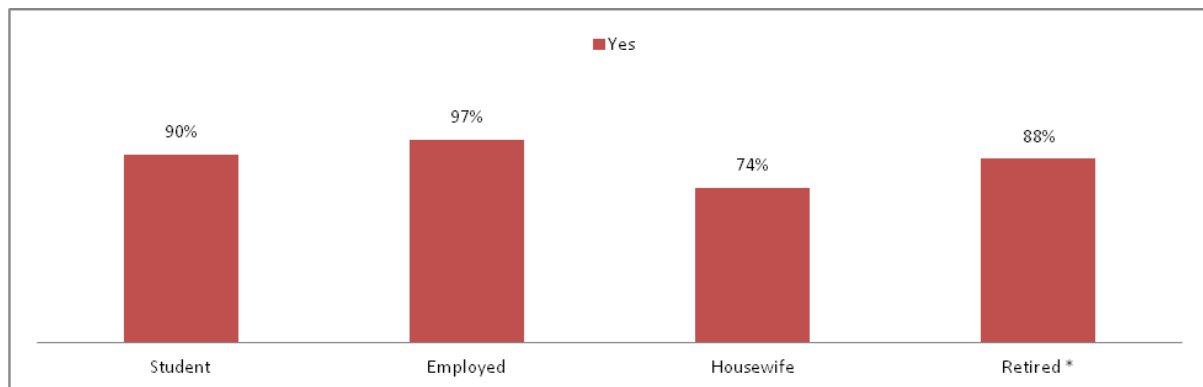
Table 5.3: Mobile phone ownership by income



The usage of mobile phones in lower income groups is slightly lower (86%) and increases steadily as the income increases.

Table 5.4: Mobile phone ownership by life stage

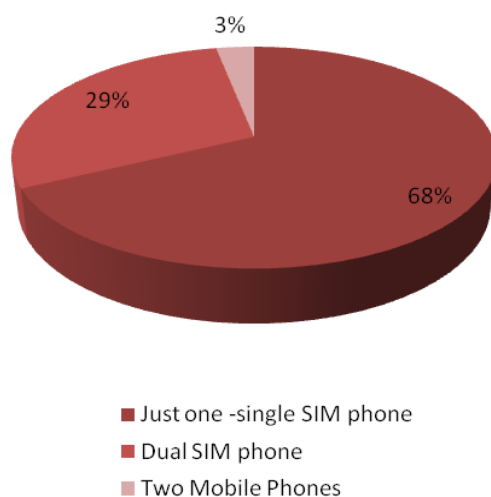
***Caution:** Small base. Not relevant for statistical significant analysis



Interestingly, employed users do not differ greatly from students in the ownership of mobile phones (97% vs. 90%). However, housewives were less likely to own a mobile phone as compared to other life-stage groups.

Table 5.5: Multiple sim and/ or phone usage, overall

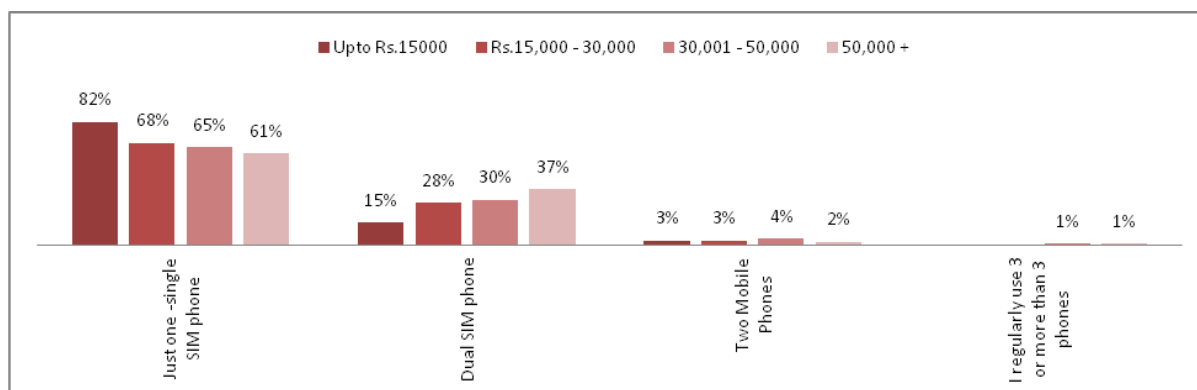
BASE: Those Urban respondents who have personal mobile phones (n=1392)



Most of the users (68%) use single hand set or SIM in their mobile phones. 29% of mobile phone owners use dual SIM phones while 3% of the users have two mobile phones.

Table 5.6: Multiple sim and/ or phone usage, by income

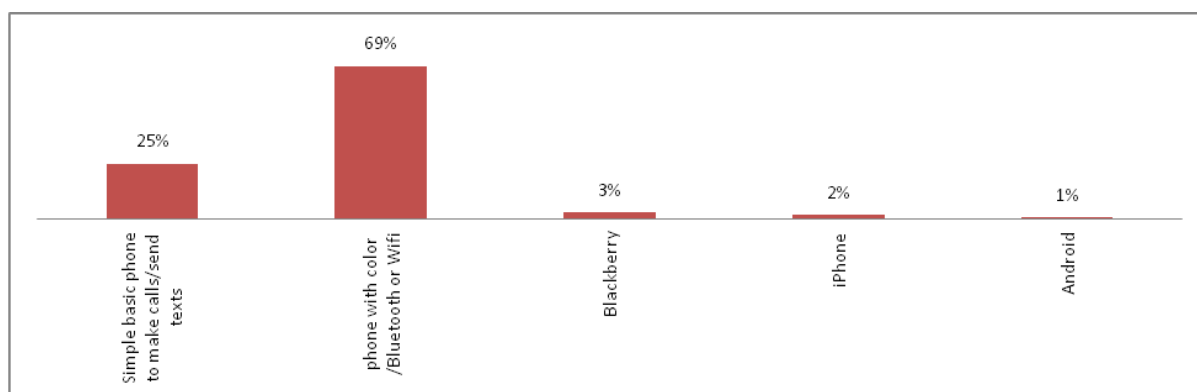
BASE: Those Urban respondents who have personal mobile phones (n=1392)



Those earning upto 15k per month mainly used single phones (82%), while high income groups were more likely to own dual SIM phones than others (37%).

Table 5.7: Types of mobile phones used, overall

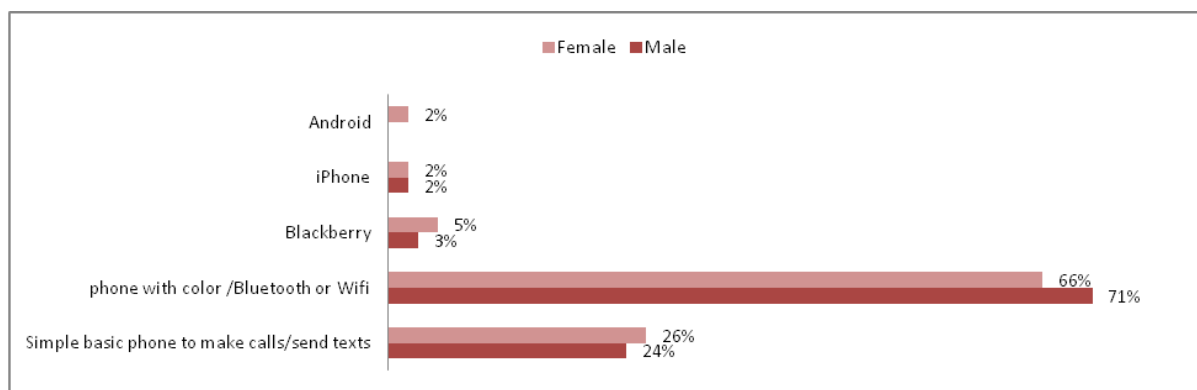
BASE: Those Urban respondents who have personal mobile phones (n=1392)



69% of Pakistani internet users use phones with color screens, Bluetooth connectivity and/or Wi-Fi features. Only 6% of the users use smart phones.

Table 5.8: Types of mobile phones used, by gender

BASE: Those Urban respondents who have personal mobile phones (n=1392)

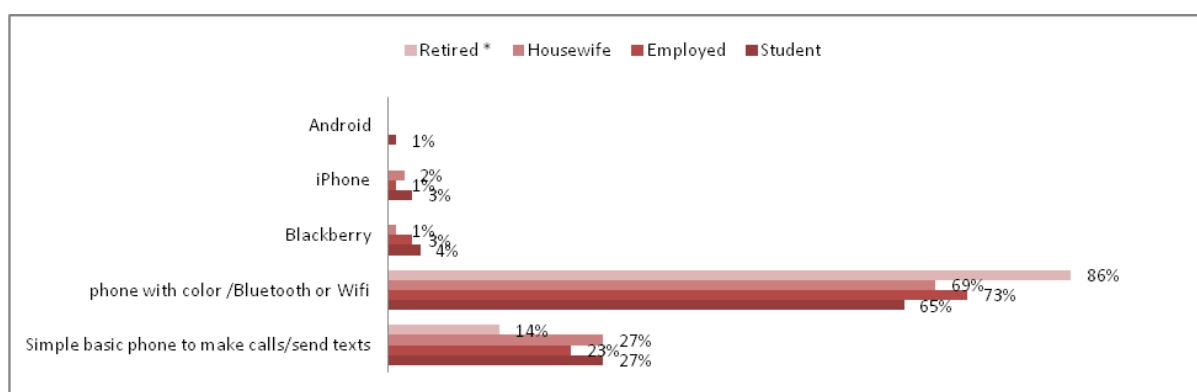


Surprisingly, females surpassed males in BlackBerry and in android usage – 5% of females use BlackBerry vs. 3% males, and 2% of females reported android usage vs. 0% males.

Table 5.9: Types of mobile phones used, by life stage

BASE: Those Urban respondents who have personal mobile phones (n=1392)

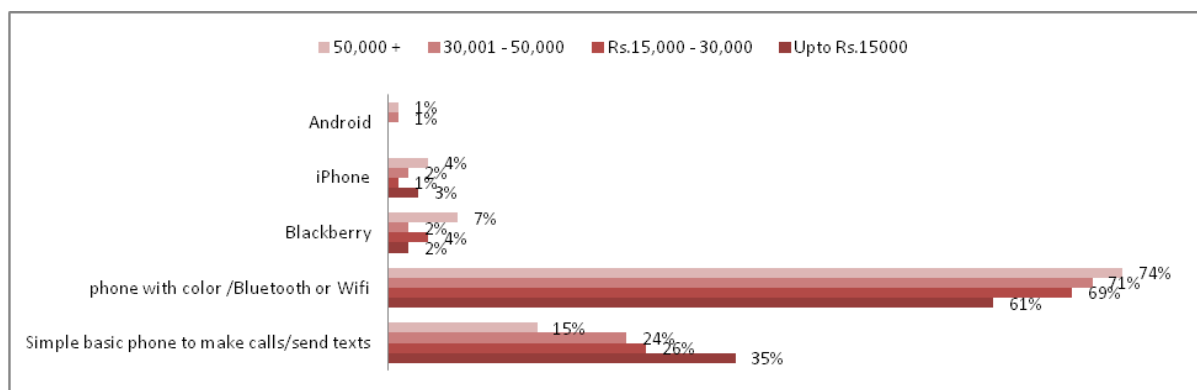
*Caution: Small base. Not relevant for statistical significant analysis



Employed users were (73%) more likely to use phones with additional features than students and housewives. Students outnumbered all other life-stages in the ownership and usage of smart phones.

Table 5.10: Types of mobile phones used, by income

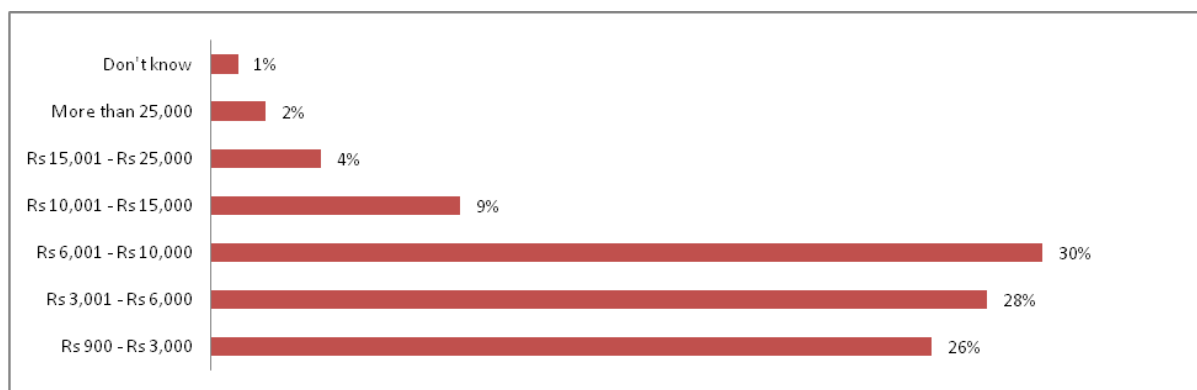
BASE: Those Urban respondents who have personal mobile phones (n=1392)



The lower income groups were the main users of simple basic phones, whereas for hi-tech features or phones, very high income group surpassed all other groups. However, high income groups were as likely to use iPhones as the lower income groups. This may be due to the availability of replicas of branded phones from China.

Table 5.11: Cost of mobile phones currently used by respondents

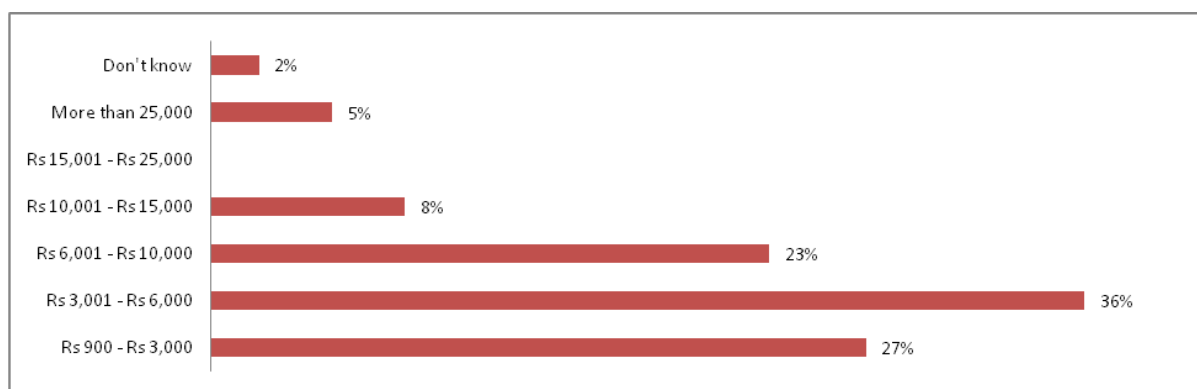
BASE: Those Urban respondents who have personal mobile phones (n=1392)



A majority of mobile phone users (30%) use phones in the price range of Rs 6,000 – Rs 10,000. [Fig 5.11]

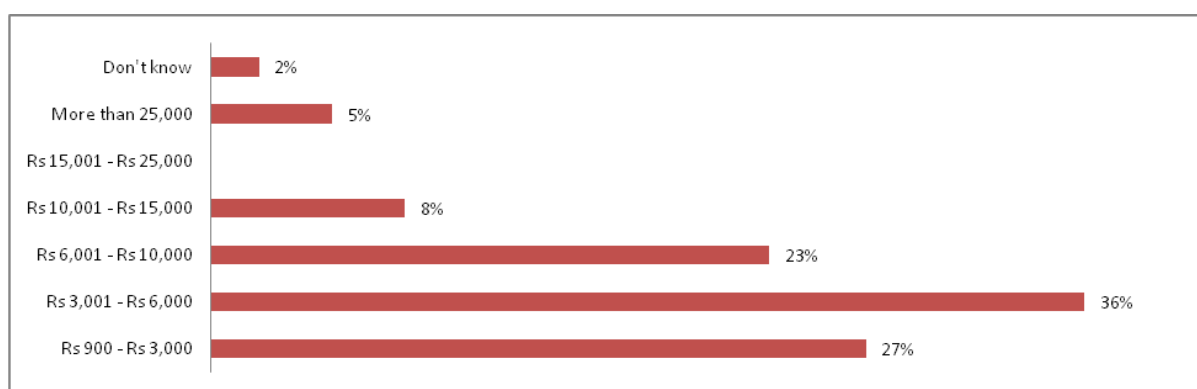
Table 5.12: Cost of mobile phones currently used by respondents with income up to PKR 15000

BASE: Those Urban respondents who have personal mobile phones (n=1392)



More than one third of respondents (36%) from low income groups (below PKR 15,000) indicated the use of mobile phones worth Rs. 3,000 – Rs. 6,000, which comes around to an alarming 40% of their monthly income.

Table 5.13: Cost of mobile phones currently used by respondents with income PKR 15001 – 30000



Similarly, the income bracket of Rs. 15,000 – Rs. 30,000 mainly indicated owning sets worth Rs. 6,000 – Rs. 10,000, which again could represent up to 30% of their monthly income.

Table 5.14: Cost of mobile phones currently used by respondents with income PKR 30001 – 50000

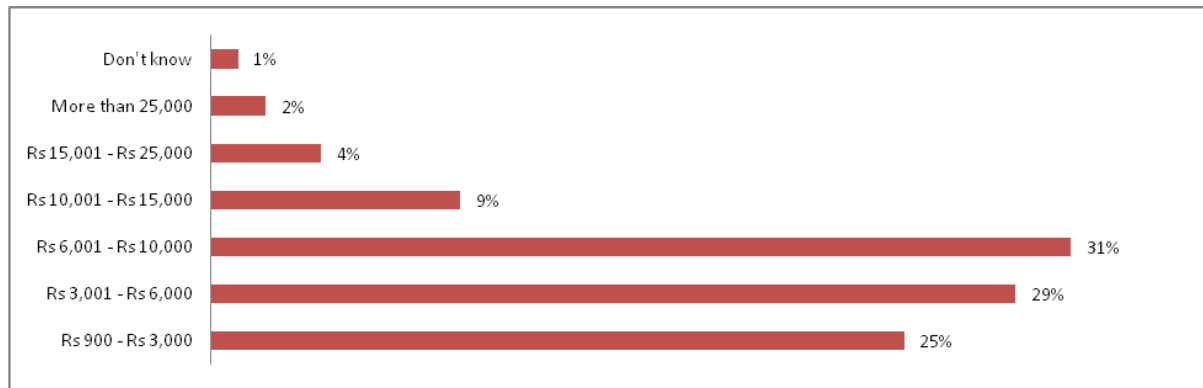
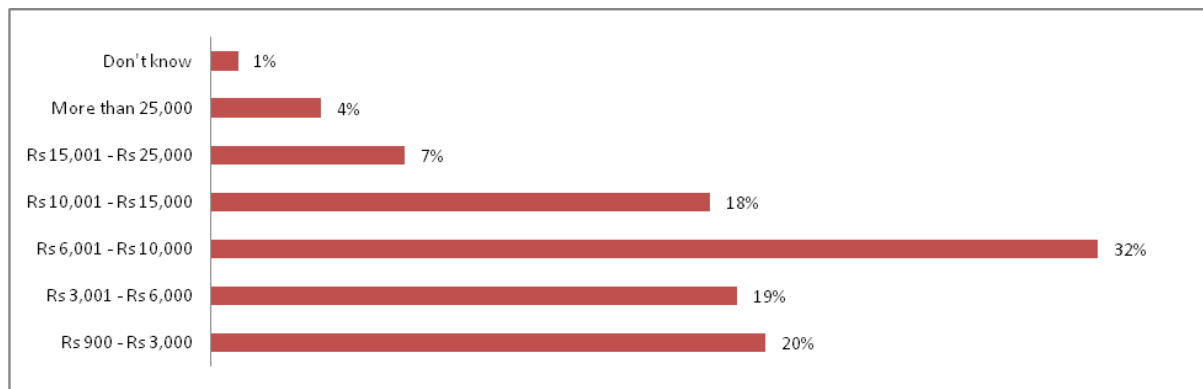


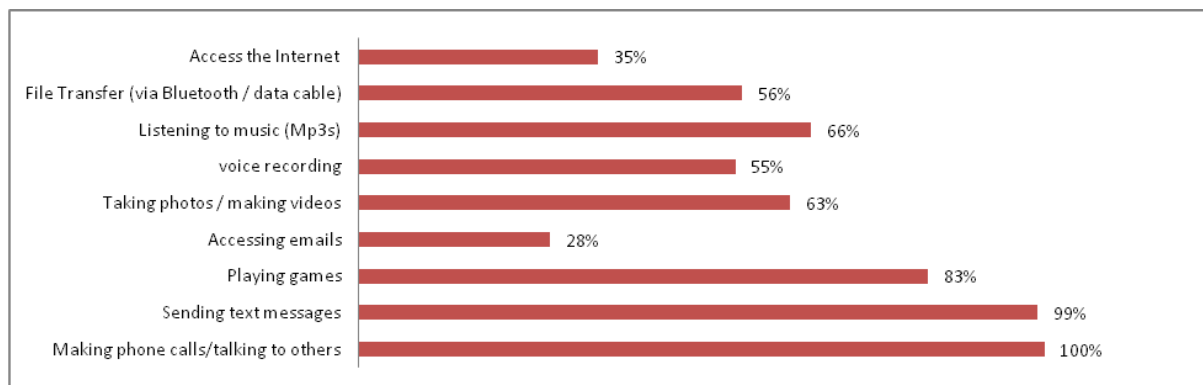
Table 5.15: Cost of mobile phones currently used by respondents with income above PKR 50,000



The higher income groups [Fig 5.14 and Fig 5.15] showed more stability in majorly owning sets priced at PKR 6,000 – PKR 10,000, which represented 20% or less of their monthly income.

Table 5.16: Mobile phone features used, overall

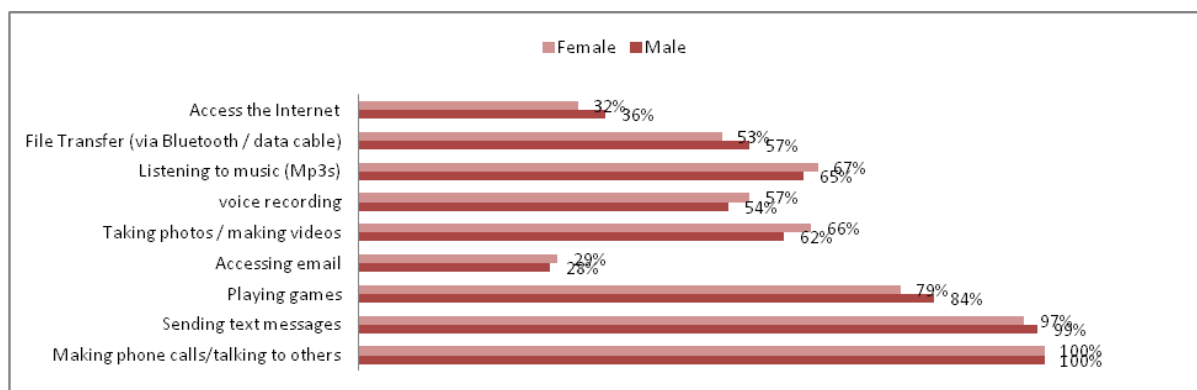
BASE: Those Urban respondents who have personal mobile phones (n=1392)



Almost all users used cell phones for making calls and text messages (100%). Other common activities were playing games (83%), listening to music (66%) and taking photos (63%). The incidence of accessing emails (28%) was the lowest vs. other functions.

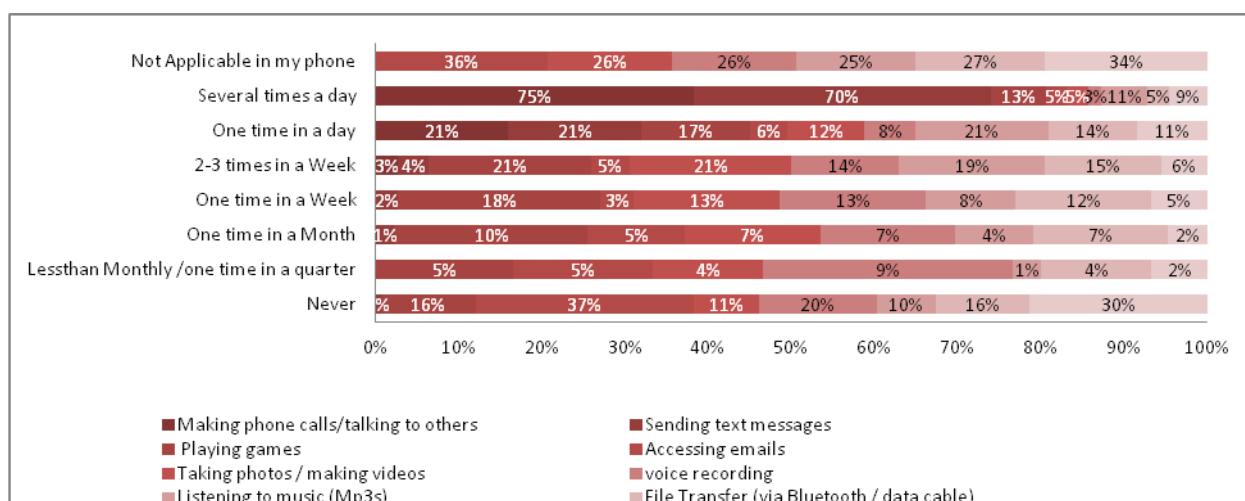
Table 5.17a: Mobile phone features used, by gender

BASE: Those Urban respondents who have personal mobile phones (n=1392)



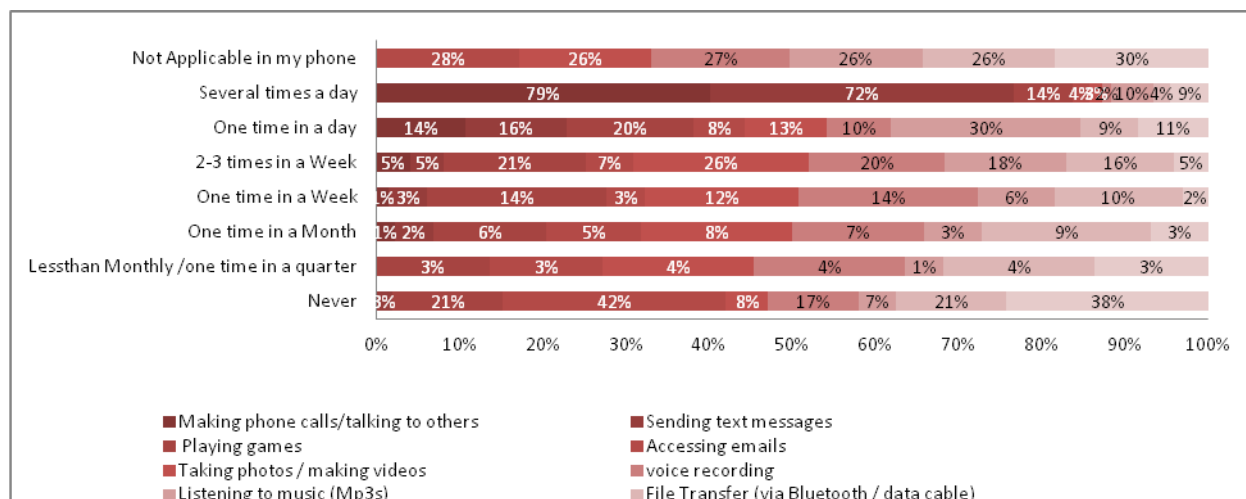
The incidence of making calls and text messaging were equally high in both genders (100% and 99%) followed by playing games (89% vs. 74%). The other common functions were listening to music (67% vs. 69%) and taking photos/videos (66% vs. 62%) in which females were ahead of males.

Table 5.17b: How frequently mobile phone features are used – Male



Besides making excessive phone calls and text messages male users were also inclined towards listening to music on their mobile phones as a part of their daily routine. The highest weekly frequencies observed for playing games (38%) followed by taking photos/making videos (34%).

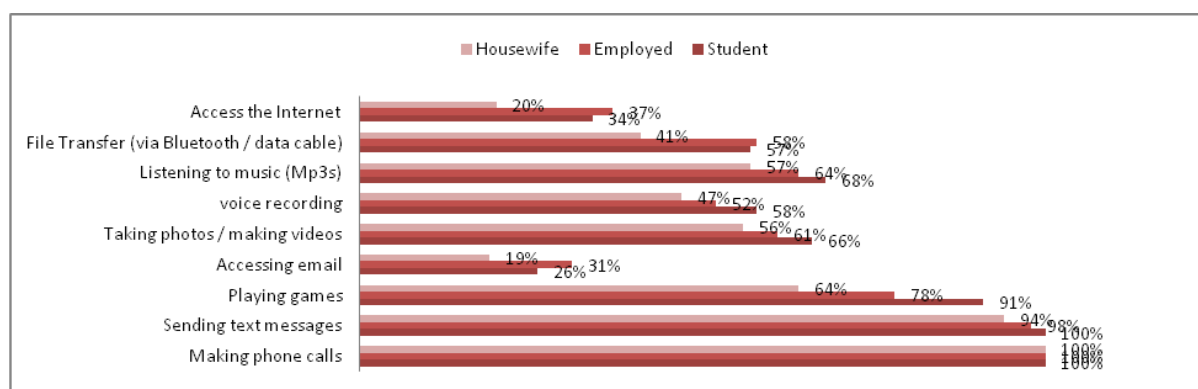
Table 5.17c: How frequently mobile phone features are used – Female



Females had almost the same frequencies for making calls and text messages like males but they surpassed them in taking photos/making videos (38% vs.34%) and voice recording (34% vs. 27%) in weekly frequencies.

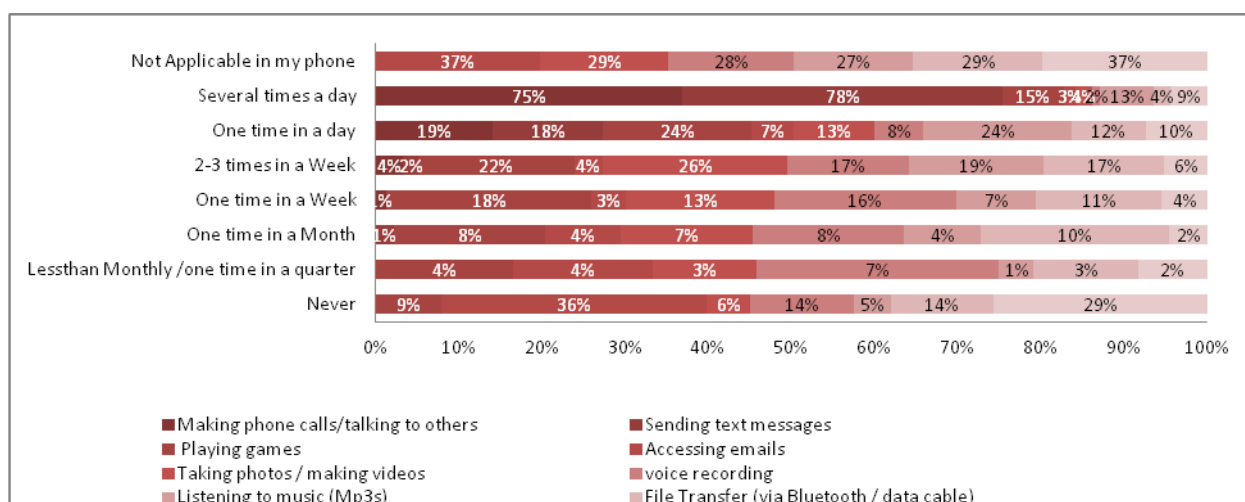
Table 5.18a: Mobile phone features used, by Life stage

BASE: Those Urban respondents who have personal mobile phones (n=1392)



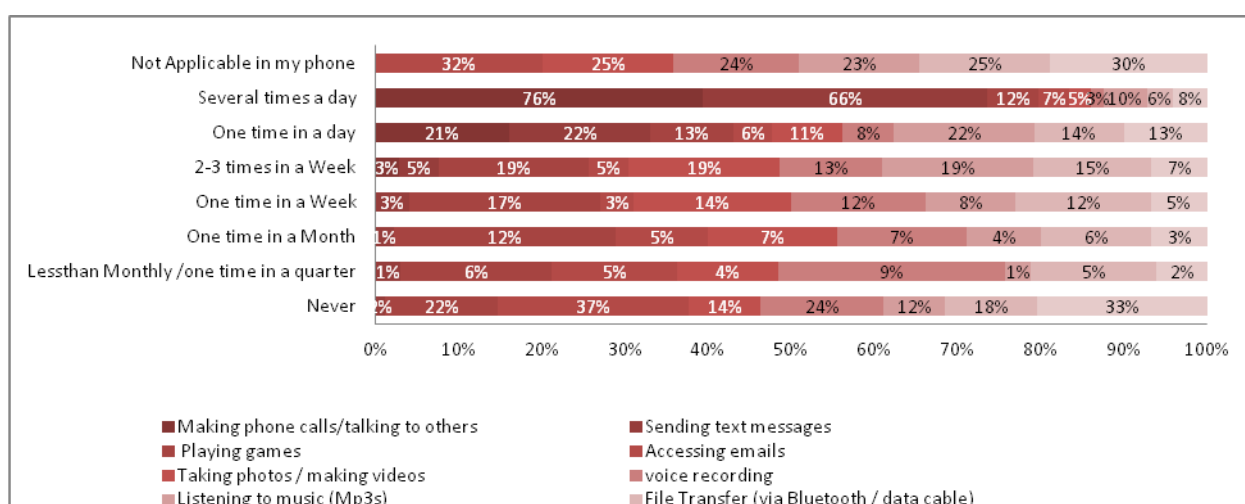
Students were the most active users of all features of mobile phones, surpassed by employed persons in accessing the internet, checking email and transferring files.

Table 5.18b: How frequently mobile phone features are used – Student



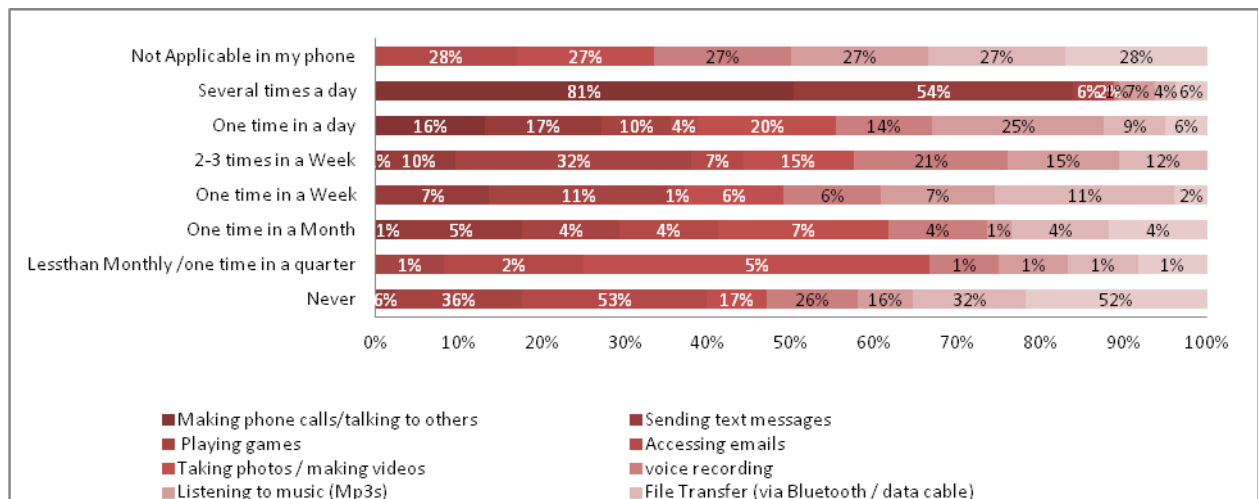
Students got the highest daily frequencies for SMS (96%) and playing games (39%) as compared to employed and housewives. They also got the highest weekly frequencies in taking photos (39%) and voice recording (33%).

Table 5.18c: How frequently mobile phone features are used – Employed



Employed users surpassed students [Fig 5.18b] and housewives [Fig 5.18d] in listening to music (41%) on a weekly basis. The highest daily frequencies were observed for file transfer (20%) and accessing internet (21%).

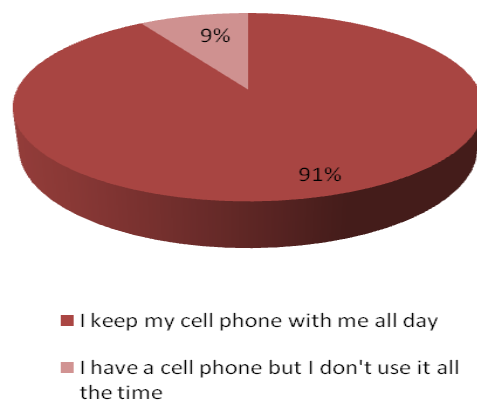
Table 5.18d: How frequently mobile phone features are used – Housewife



Housewives seemed less active in using the different features of mobile phones however they are close to employed and students in making calls (97%). The highest weekly frequencies observed for housewives is in playing games (43%) where they surpassed students and employed users.[Fig 5.18b and Fig 5.18c]

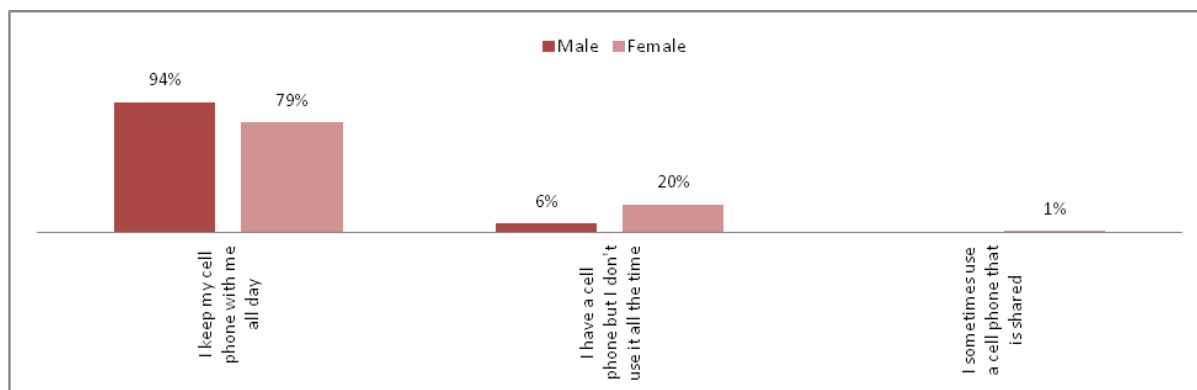
Table 5.19: Overall mobile phone usage pattern

BASE: Urban respondents with personal mobile phones (n=1392)



Most of the internet users who owned a mobile phone, preferred to keep cell phones with them for the whole day (24/7).

Table 5.20: Mobile phone usage patterns by gender

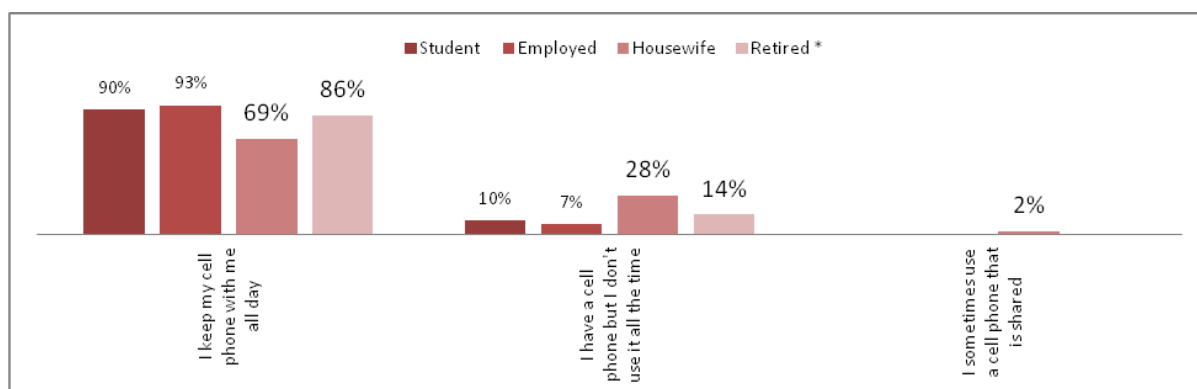


Male (94%) mobile owners were more likely to keep cell phones with them for the whole day than females. 1% of females also use shared mobile phones.

Table 5.21: Mobile phone usage patterns by life stage

BASE: Those Urban respondent have personal mobile phone (n=1392)

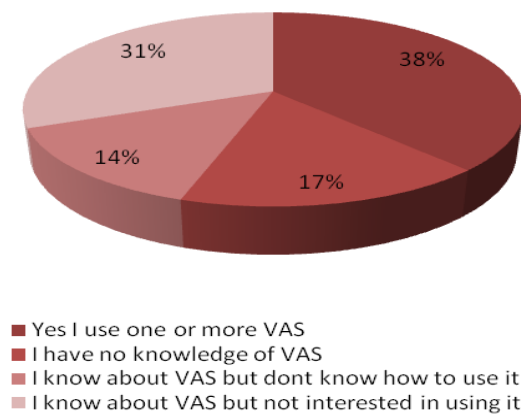
*Caution: Small base. Not relevant for statistical significant analysis



Most employed and student mobile owners carried their phones with them all day long. More than one-fourth of female mobile phone owners claimed that they did not carry their mobile phones all the time.

Table 5.22: Overall awareness of VAS

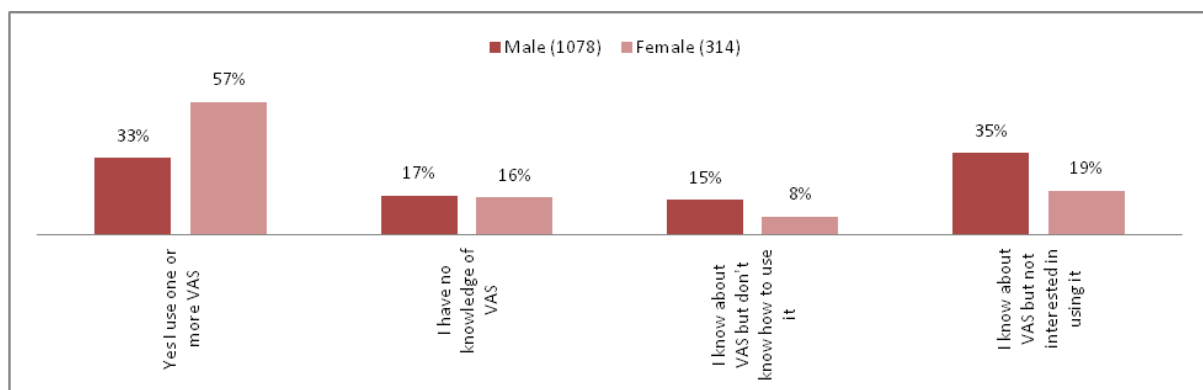
BASE: Those Urban respondents who have personal mobile phones (n=1392)



52% of mobile phone owners had knowledge of value added services offered by their telecom providers: out of these, only 38% use VAS.

Table 5.23: Awareness of VAS by gender

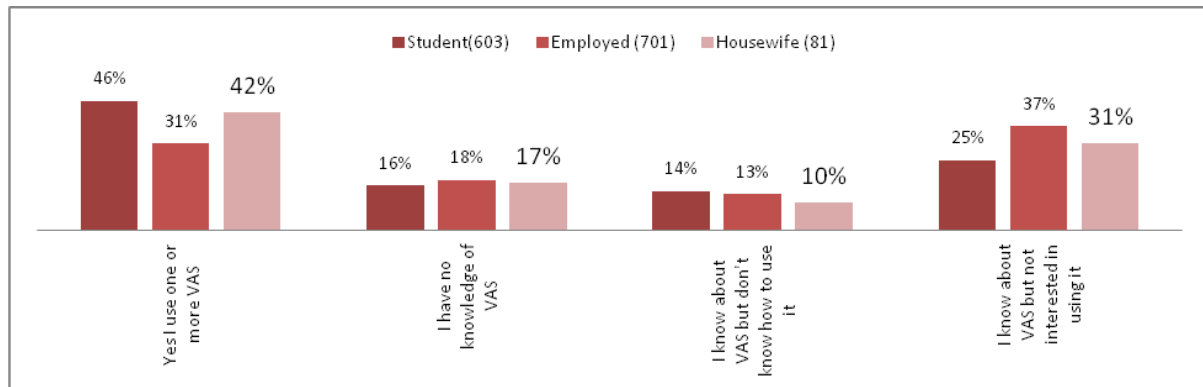
BASE: Those Urban respondents who have personal mobile phones (n=1392)



57% of females use VAS, surpassing male VAS usage at 33%.

Table 5.24: Awareness of VAS by life stage

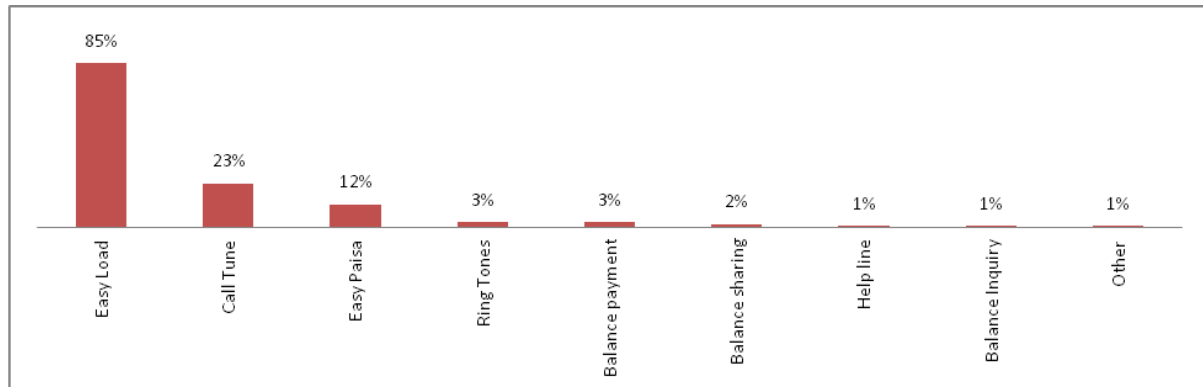
BASE: Those Urban respondents who have personal mobile phones (n=1392)



Students and housewives were the most frequent users of VAS, at 46% and 42% respectively.

Table 5.25: Overall VAS usage (top 3)

BASE: Those Urban respondent who used VAS (n=534)

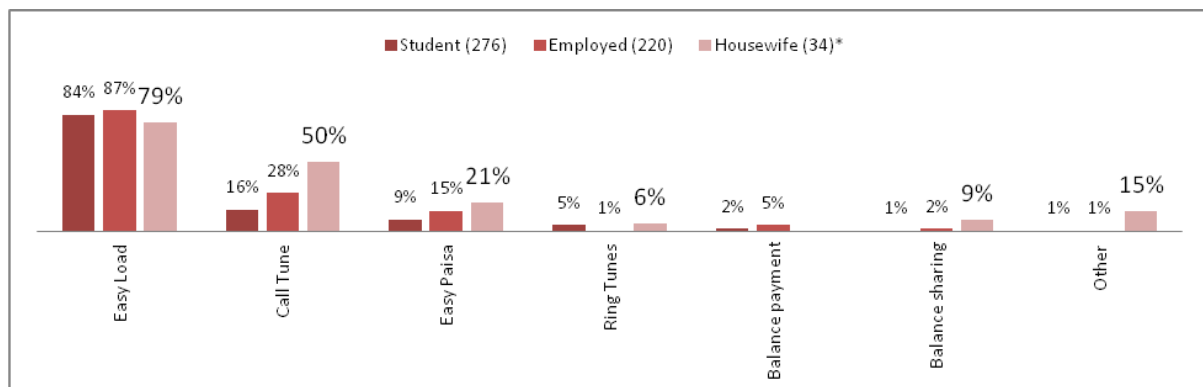


The 3 most frequently-used VAS were Easy Load (85%), Caller Tunes(23%) and Easy Paisa(12%).

Table 5.26: VAS usage (top 3), by life stage

BASE: Those Urban respondents who used VAS (n=534)

*Caution: Small base. Not relevant for statistical significant analysis



Employed mobile owners were more likely to use Easy Load (87%), while housewives frequently used Caller Tunes and Easy Paisa as well.

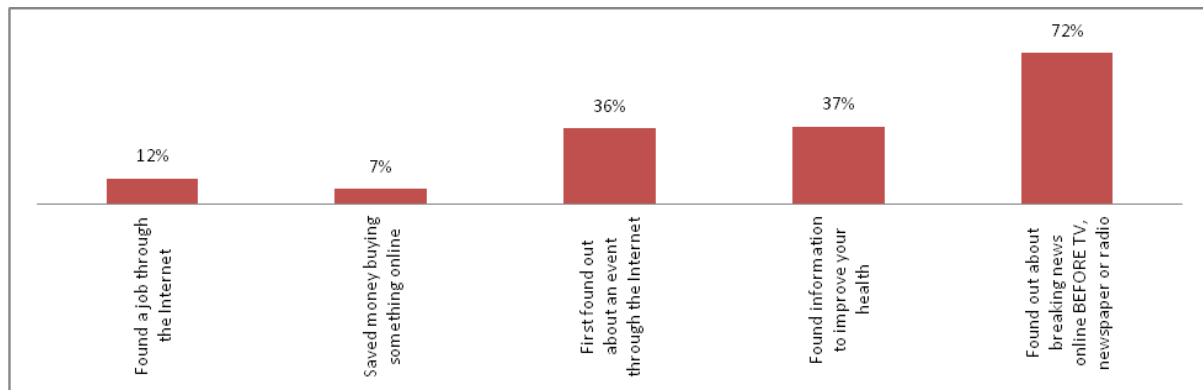
Effectiveness of the Internet

Large percentages of users (72%) find the Net has a discernible impact on their lives, principally due to accessibility of news, and 37% find it useful for information about health, with almost the same number using it to find out about local events. 76% feel that the Net has helped them build and maintain relationships with others, but nearly 60% think it is unreliable and risky for e-commerce. Privacy perceptions are weak and confused, but over a quarter of respondents associate online commerce with the possibility of breach of personal privacy. This confusion is apparent when regulation is concerned, as 76% believe they are responsible for their own safety, while 64% believe that it is the job of the government.

The majority of all users (78%) think technology contributes to making a better world, while 63% equate it with progress. This is even more true for women (84%) than men (76%), even though equal numbers of men and women (26%) report some unease with their own actual use. The Internet is felt to be a source of some unease, with nearly 3/4 of all respondents perceiving or associating it with immoral material, and at the same time, nearly the same number appreciating the fact that it helps save time. As far as building and maintaining personal relationships is concerned, more women (63%) than men (57%) find it better than meeting people in person, but almost the same percentages (70+%) acknowledge it is helpful to stay in touch with family and friends.

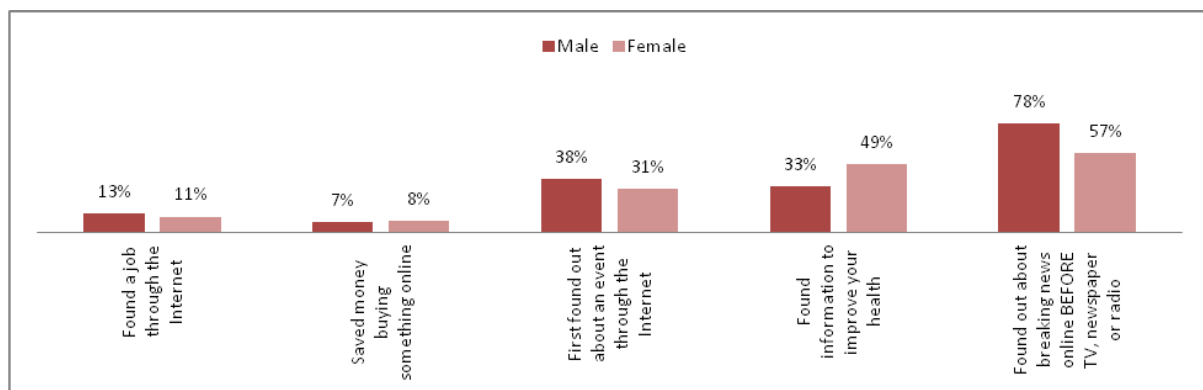
There seems to be a strong bias about the quality of information on the Net, with 85% of the respondents feeling that some sort of control or regulation over children using the Net is needed. Encouragingly enough, this attitude is not seen to such a great extent, while considering whether women should be restricted in any way from accessing the Net. The overall negative perception was much greater by men than women, although as many as 11% of women reported the need to control access for younger girls. As education levels increase, the bias against women (in terms of enabling Net access) decreases, expectedly.

Table 6.1: Effectiveness of internet



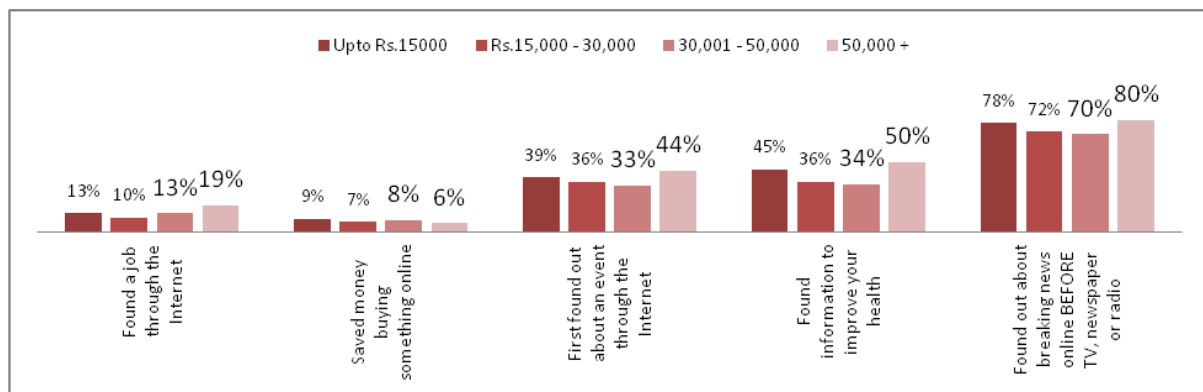
72% of users found out about breaking news first on the internet than through traditional media. More than one third of the users found information that helped improve their health and also found about local events via the internet. Very few of the users found jobs and saved money via the internet (12% and 7%).

Table 6.2: Effectiveness of internet, by gender



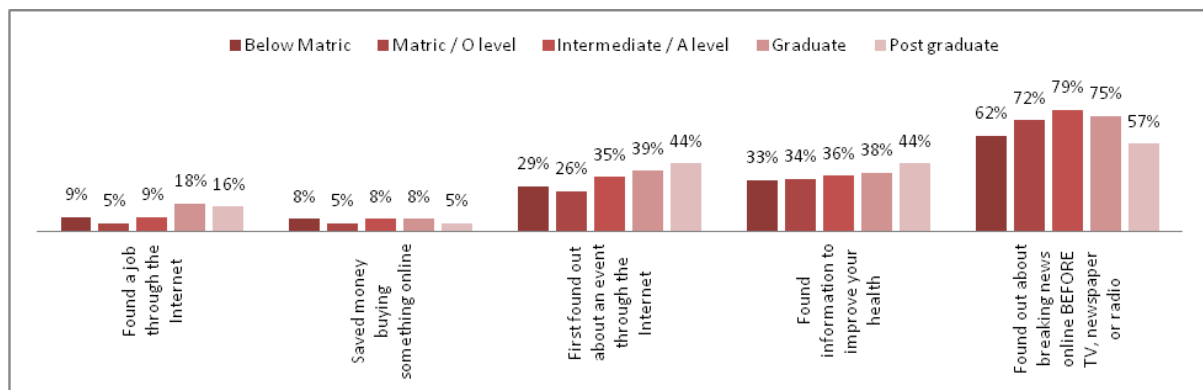
Male users found the internet most effective in bringing them breaking news first and in finding out about local events online. Female users found the internet to be more effective vs. males in finding out health related information.

Table 6.3: Effectiveness of internet, by income



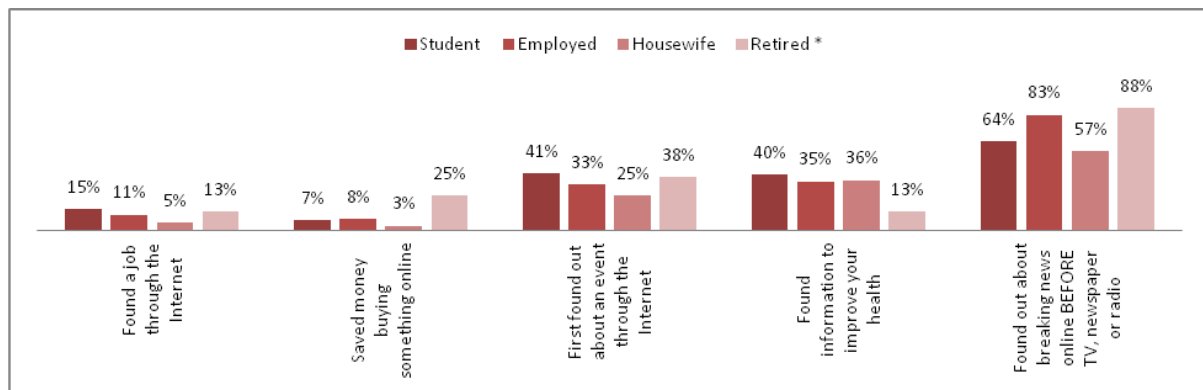
The lowest and highest income groups are the most tuned in to finding out breaking news via the internet. 19% of the high-income groups also found jobs via the internet.

Table 6.4: Effectiveness of internet, by education



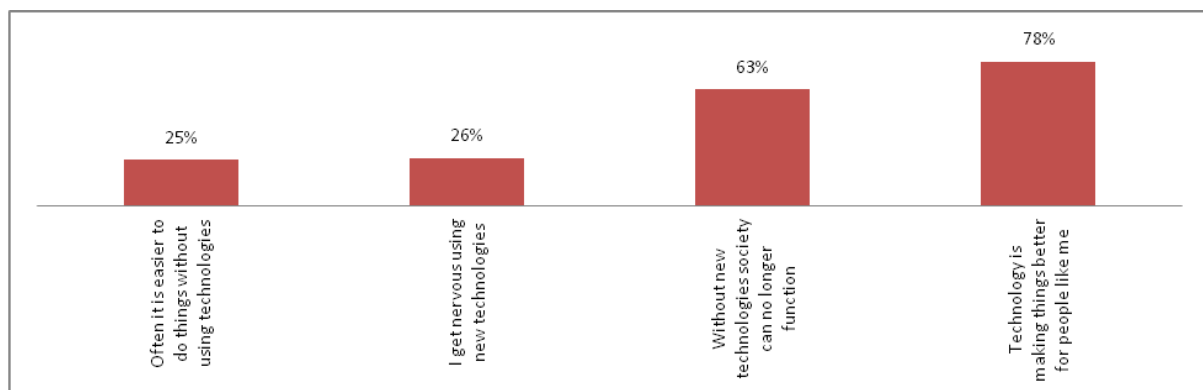
Post graduates were more likely to have improved their health and to have found out about local events via the internet (44%). Less educated users were more interested in saving money online vs. the more educated segments.

Table 6.5: Effectiveness of internet, by life stage



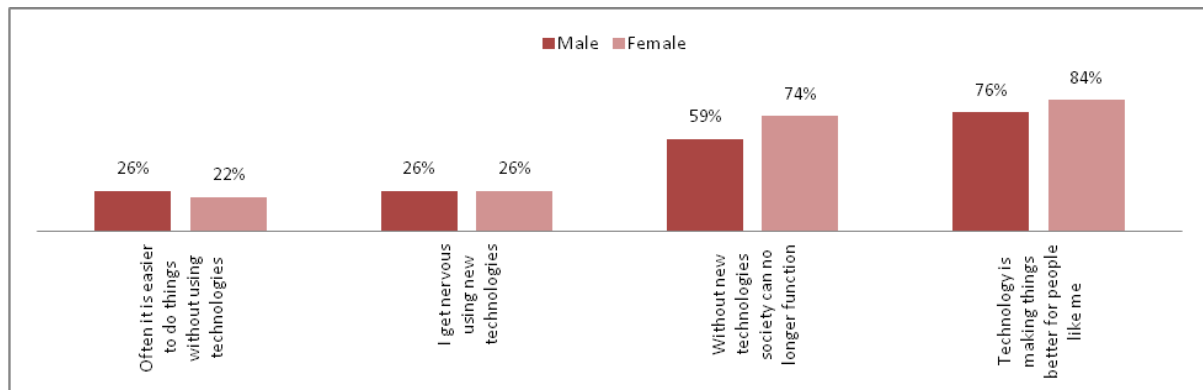
Students were more interested in finding out about local events and health related information online, whereas employed persons were more inclined towards finding out breaking news online.

Table 6.6: Overall attitudes towards technology



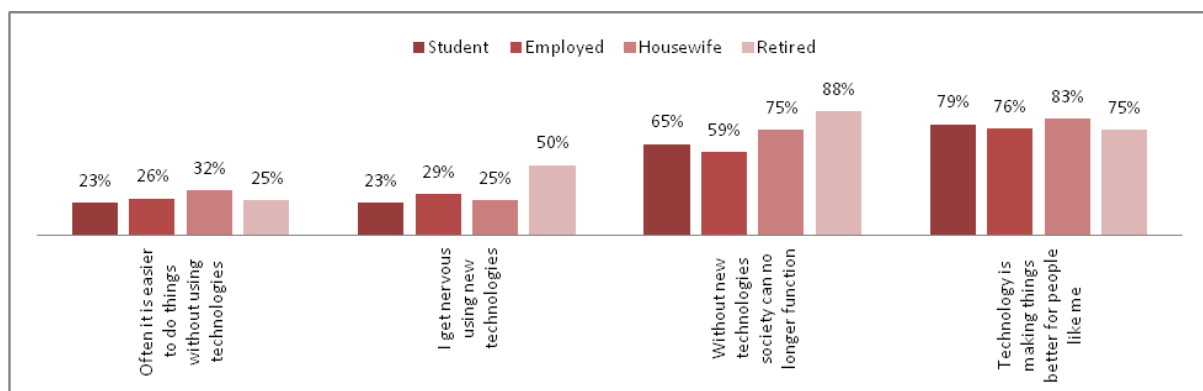
The overall attitude towards technology was optimistic with the confidence that technology is making things better (78%) and there can't be progress in the society without new technologies (63%).

Table 6.7: Attitudes towards technology, by gender



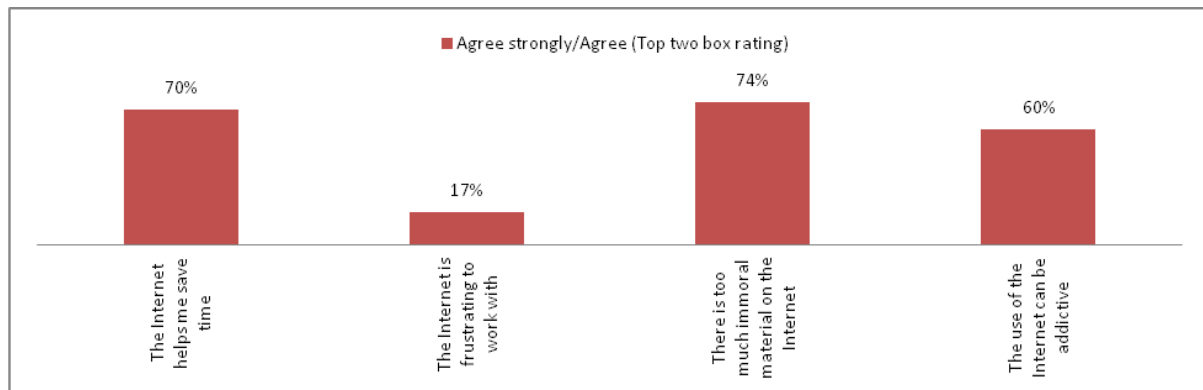
Females are encouragingly more optimistic and adoptive of new technologies than males; 84% of the females felt that technology makes things better and 74% believed that society can't progress without using new technologies.

Table 6.8: Attitudes towards technology, by life stage



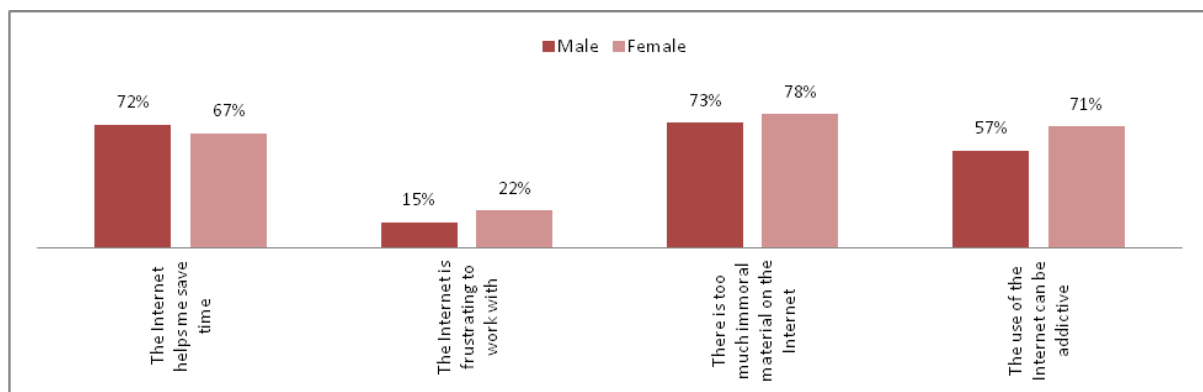
All life stage groups had positive attitudes towards new technology. However, employed persons seemed more pessimistic as up to 29% reported that they felt nervous using new technologies.

Table 6.9: Overall general attitudes towards internet



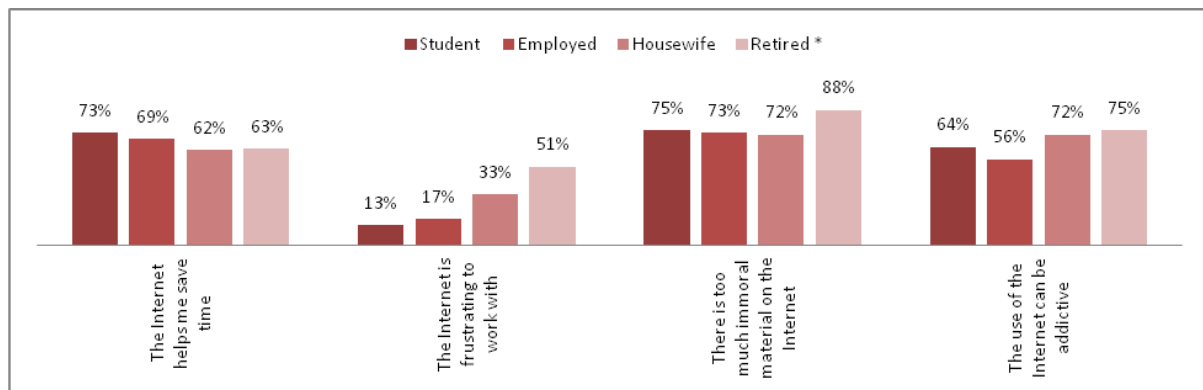
Although most of the internet users (70%) believe that the internet is very efficient to work with and helps in saving time, 74% expressed concern about immoral material being available freely online and 60% believed that the use of the internet could become addictive.

Table 6.10: Overall general attitudes towards internet, by gender



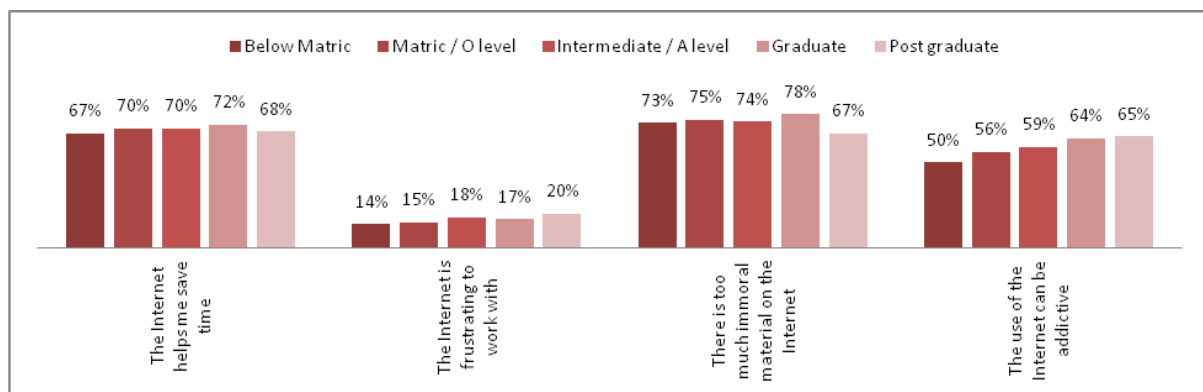
Females showed more concern than males over the addictive nature of the internet, the frustrating nature of the internet and the availability of immoral material online.

Table 6.11: Overall general attitudes towards internet, by life stage



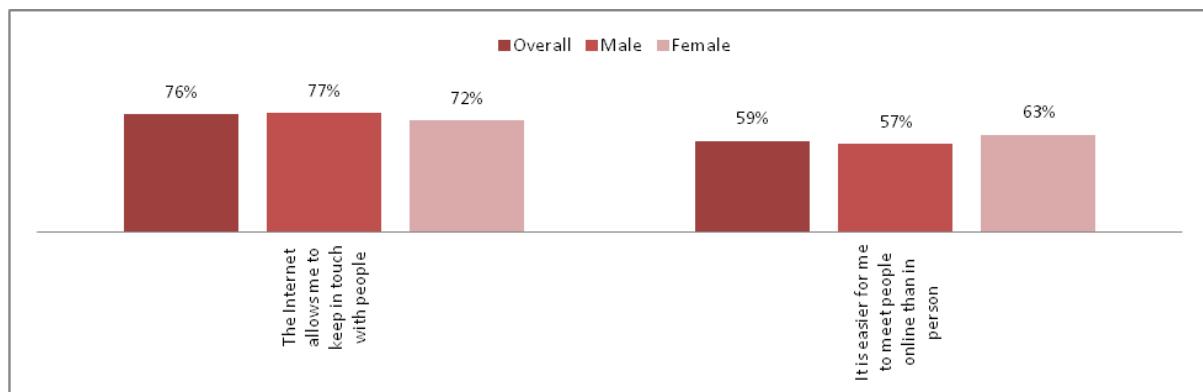
All life stage groups had positive attitudes towards efficient working on the internet but students were more convinced that the internet helps them save time (73%) vs. employed segments (69%) and housewives (62%). There was a unanimous concern about the availability of immoral material online by all groups.

Table 6.12: Overall general attitudes towards internet, by level of education



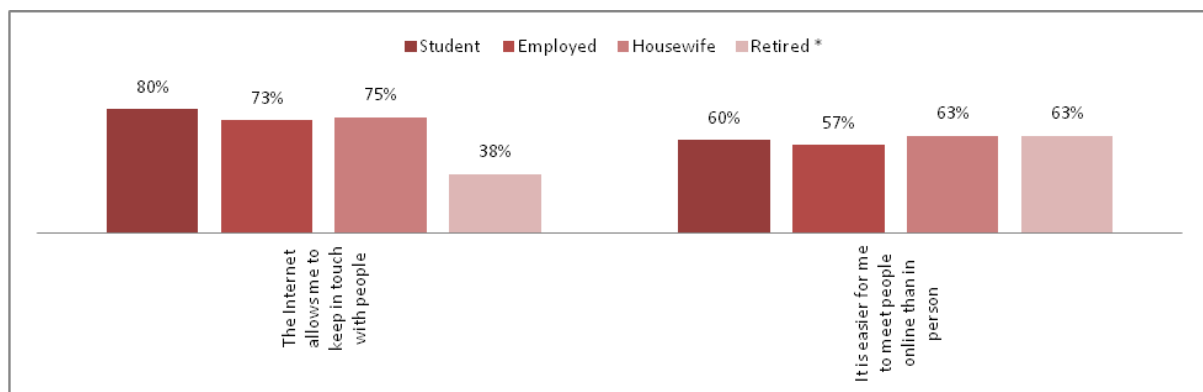
No clear difference was observed among different education levels regarding attitudes towards the internet.

Table 6.13: Overall and gender-wise attitudes towards relationship building via internet



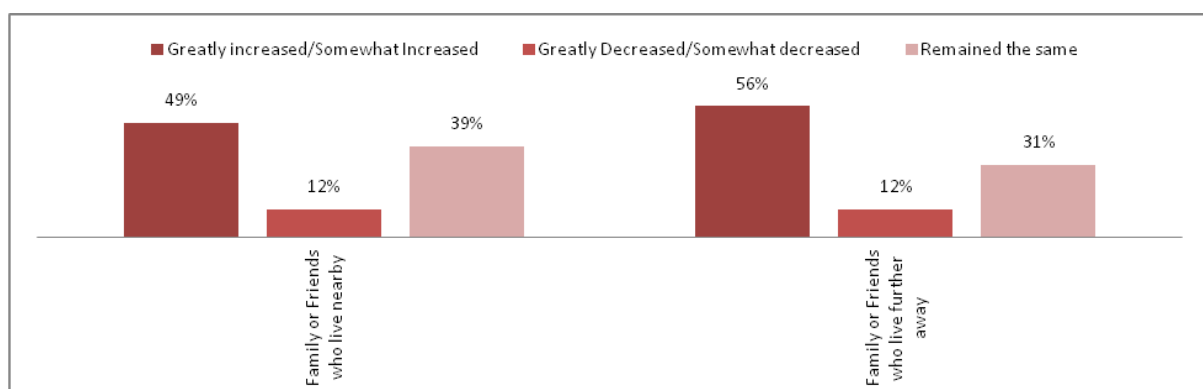
Respondents believed that the internet is a good channel to build relationships and to keep in touch with friends, family and other people (76%). More females found it easier to meet people online vs. in person (63% vs. 57%).

Table 6.14: Attitudes towards relationship building via internet, by life stage



The students (80%) were more likely to get in touch with people via internet than employed users and housewives (60%). Housewives found it easiest to meet people online vs. in person.

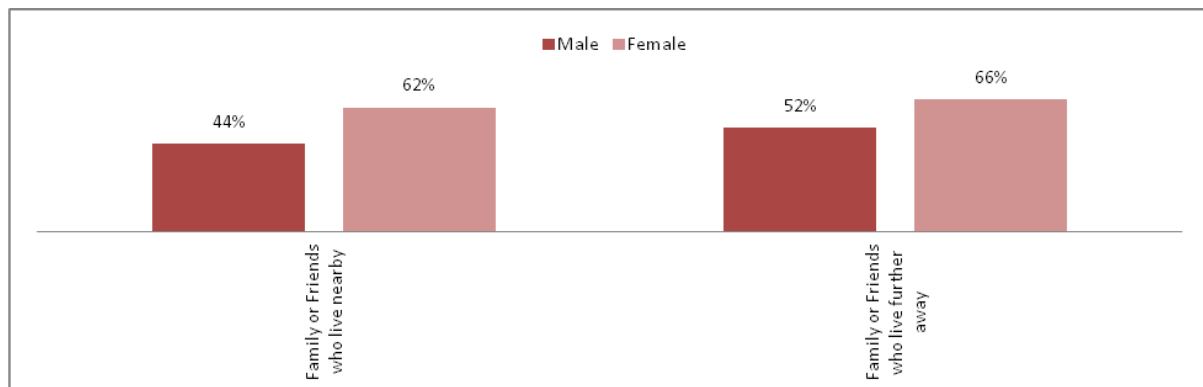
Table 6.15: Overall influence of the internet on offline relationships



The internet has had a positive impact on offline relationships with friends and family – both who live close by as well as those who live further away. For the friends and family live nearby, almost half (49%) of the users accepted that contact has increased and for

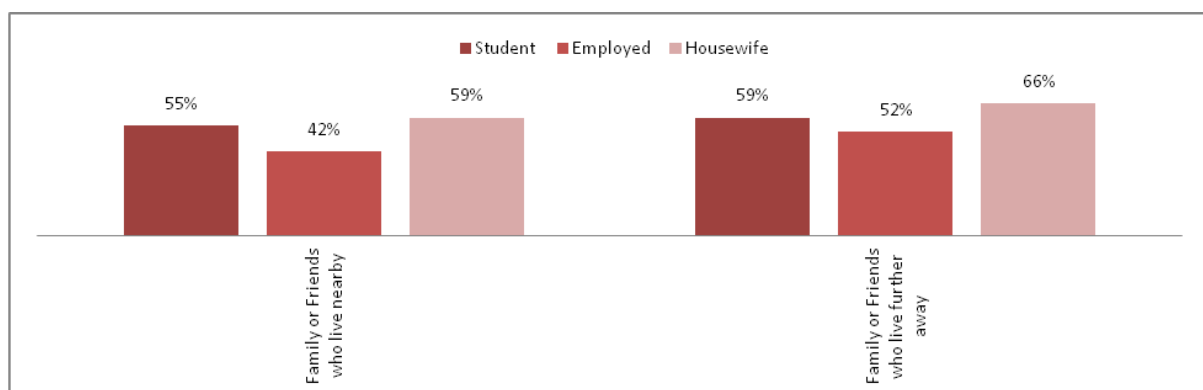
friends/family who lived far away, more than half of the users(56%) claimed the increase.

Table 6.16: Influence of the internet on offline relationships, by gender



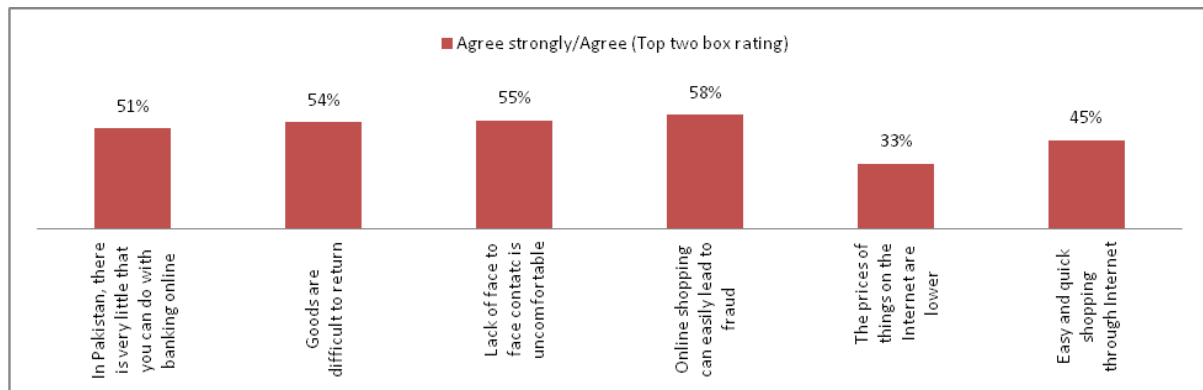
Females benefitted more than males by increasing contact with their friends and family via online contact.

Table 6.17: Influence of the internet on offline relationships, by life stage



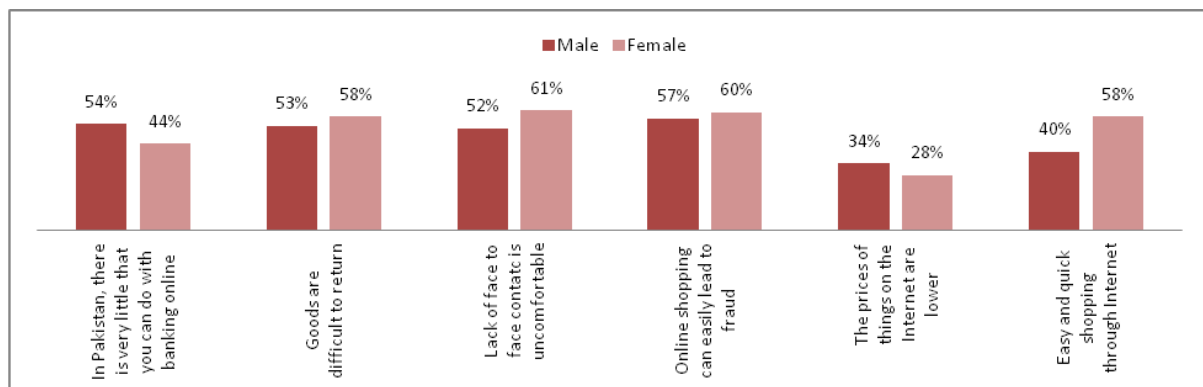
Housewives benefitted the most via increasing contact with friends and family online.

Table 6.18: Overall attitudes towards e-commerce



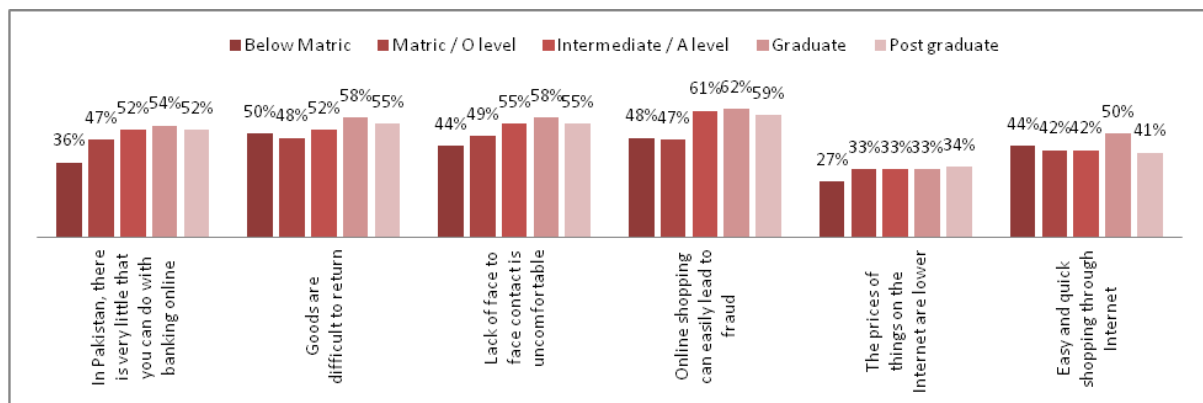
Confidence in the internet and the commercial services that it offers seemed low. The ratings were higher for negative factors vs. positive. More than half of the users agreed that the chances of fraud are very high via online shopping (58%). Users find it difficult to return goods bought online (54%) and find the lack of face-to face contact uncomfortable (55%). Less than half of the users felt that shopping is very convenient via internet and the prices are lower as compared to physical stores (33%).

Table 6.19: Attitudes towards e-commerce, by gender



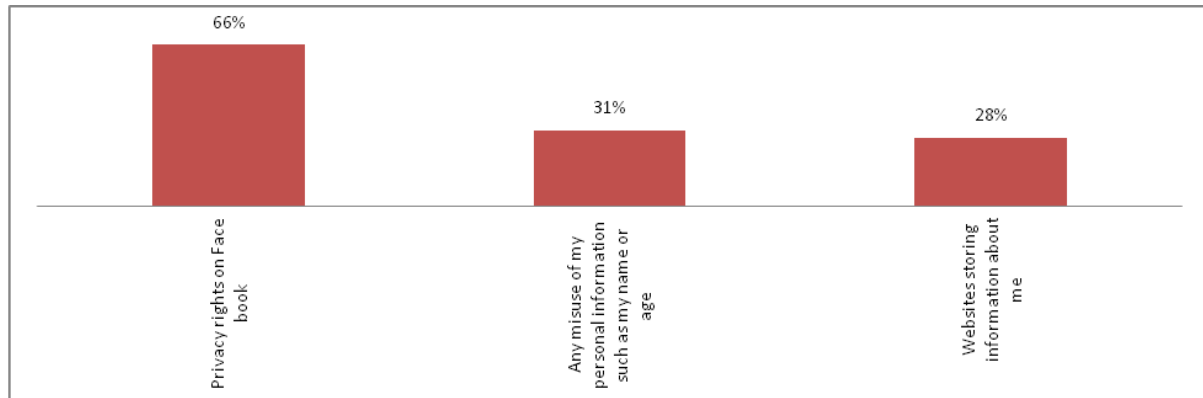
Females found it easier to shop online vs. males: 58% vs. 40%.

Table 6.20: Attitudes towards e-commerce, by level of education



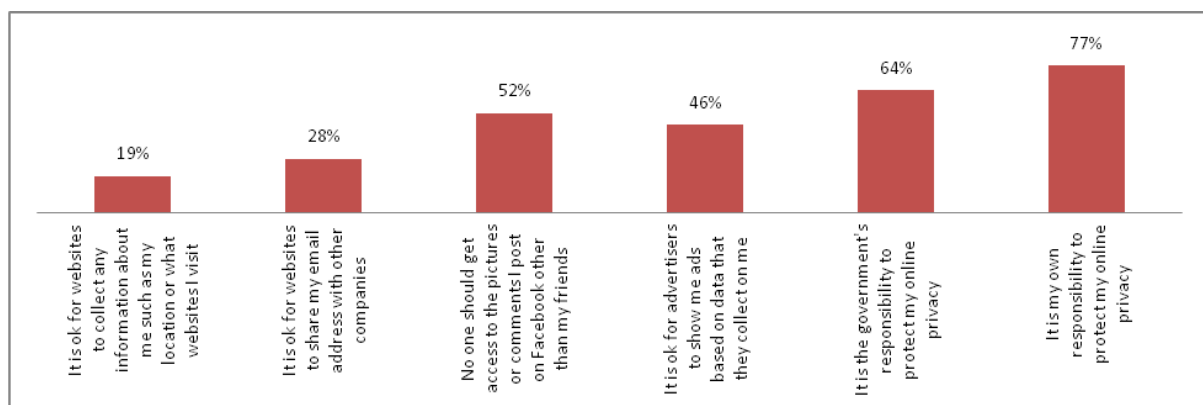
Graduates were confident about the convenience of online shopping as half of them agreed on this factor (50%). For all negative factors regarding e-commerce, the difference among post graduates, graduates and intermediate level users did not differ significantly, as they all somewhat agreed on the negative aspects.

Table 6.21: Overall understanding of online privacy



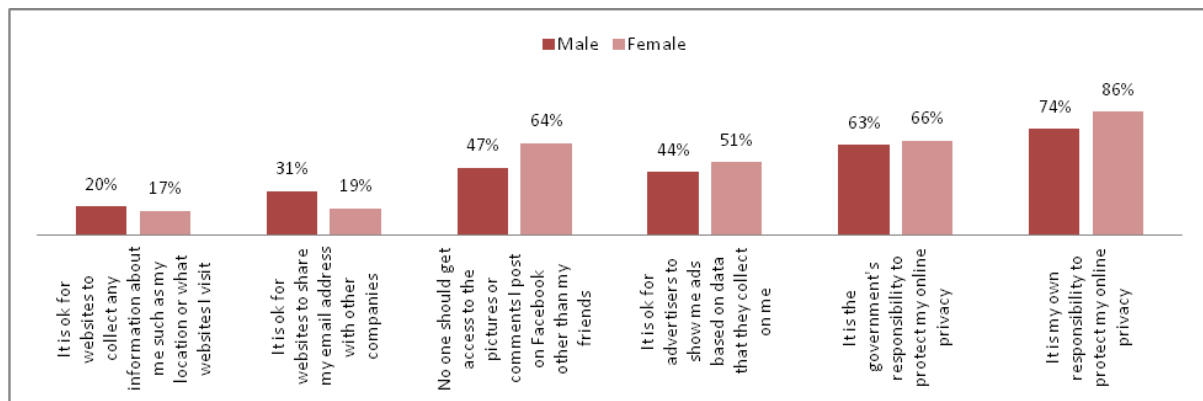
When asked about the term online privacy, most of the users (66%) mentioned “Privacy rights on Face book” as the top of mind meaning.

Table 6.22: Overall attitudes towards online privacy



While most respondents had a clear idea about their online rights and privacy, an alarming 28% felt that it was ok for websites to share their email addresses with other companies. 46% of users were comfortable with companies showing them selective ads based on gaining access to their data. Most users felt that the onus of protecting their online privacy rested on them.

Table 6.23: Attitudes towards online privacy, by gender



Females showed more concern over the protection of their online privacy and were more aware about the restriction of access to their private data.

Table 6.24a: Overall inclination towards a minimum age restriction on internet usage

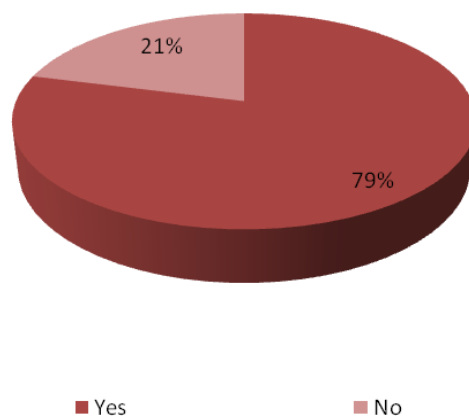
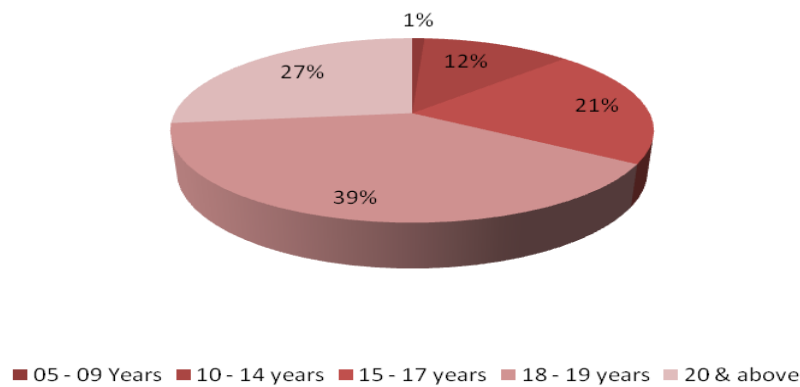


Table 6.24b: Minimum age restriction suggested by respondents, overall



Most of the respondents (79%) think that there should be a minimum age for a child to have access to the Internet [Fig 6.24a]. 40% of those respondents who think that there should be a minimum age for a child to have access to the internet said that this minimum age should be 18 to 19 years, while 27% claimed that the minimum age of children should be 20 years and above [Fig 6.24b].

Table 6.25a: Inclination towards a minimum age restriction on internet usage, by gender

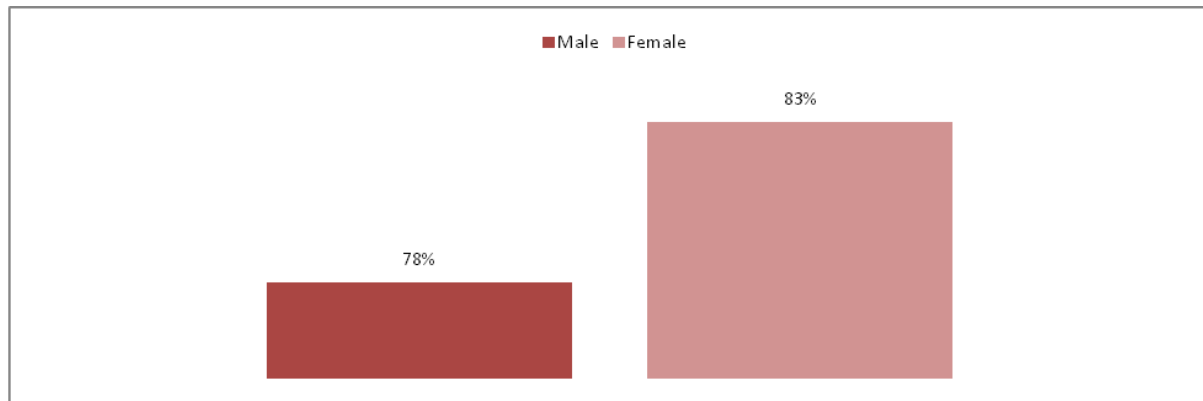
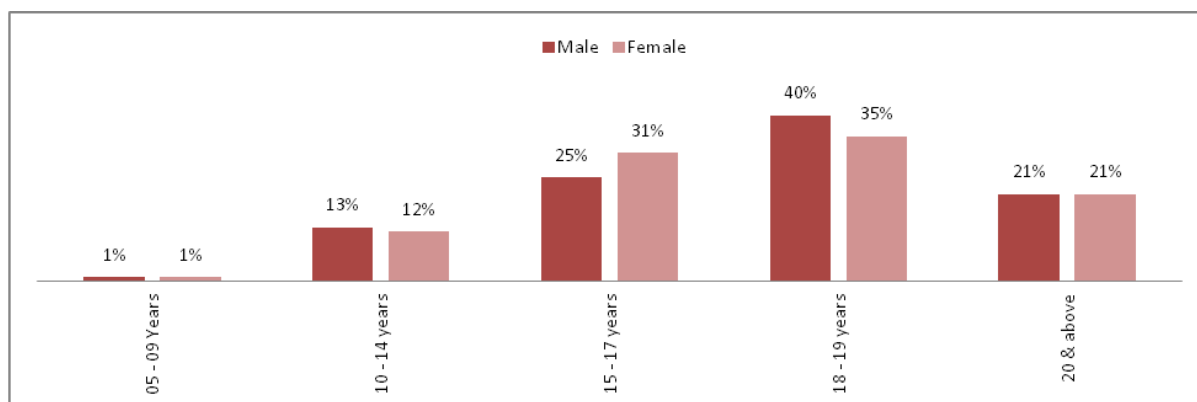


Table 6.25b: Minimum age restriction suggested, by gender

Base: Urban Respondents who agree with a minimum access age for children to access the Internet



More females (83%) than males (78%) are in the favor of imposing a minimum age on children to have access to the internet [Fig 6.25a]. 40% of males and more than one third females (35%) suggested the minimum age of children should be 18 to 19 years [Fig 6.25b].

Table 6.26a: Inclination towards a minimum age restriction on internet usage, by life stage

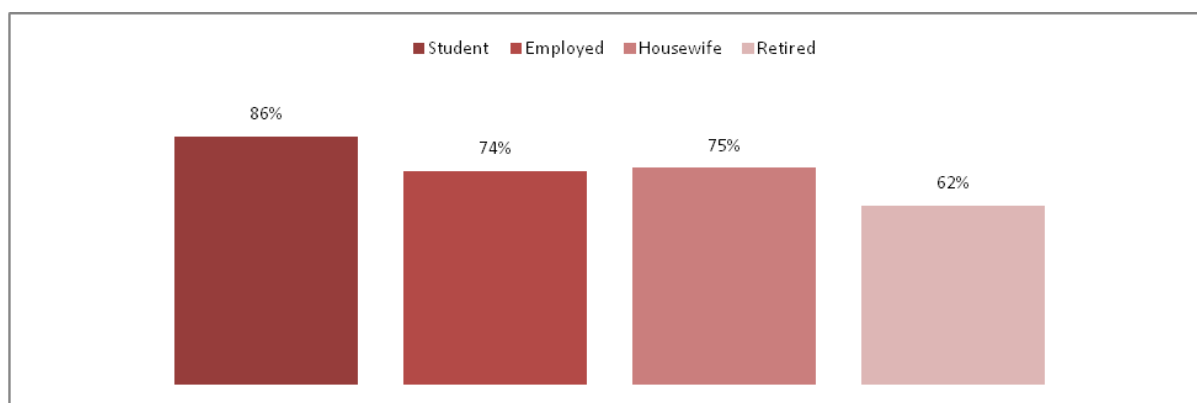
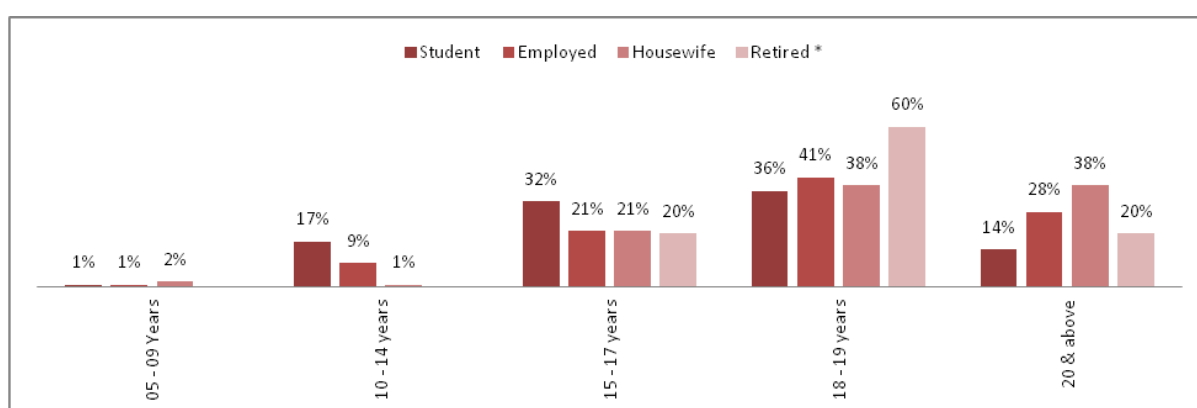


Table 6.26b: Minimum age restriction suggested, by life stage

Based: Those Urban Respondents who agree with the imposition of a minimum age for a child to access the Internet



More students (86%) than housewives (75%) and employed (74%) are in favor of imposing a minimum age for children to have access to the internet [Fig 6.26a]. Housewives and employed persons claim that the minimum age should be 20 and above, while students are advocates for children gaining access to the internet at younger ages [Fig 6.26b].

Table 6.27a: Inclination towards a minimum age restriction on internet usage, by level of education

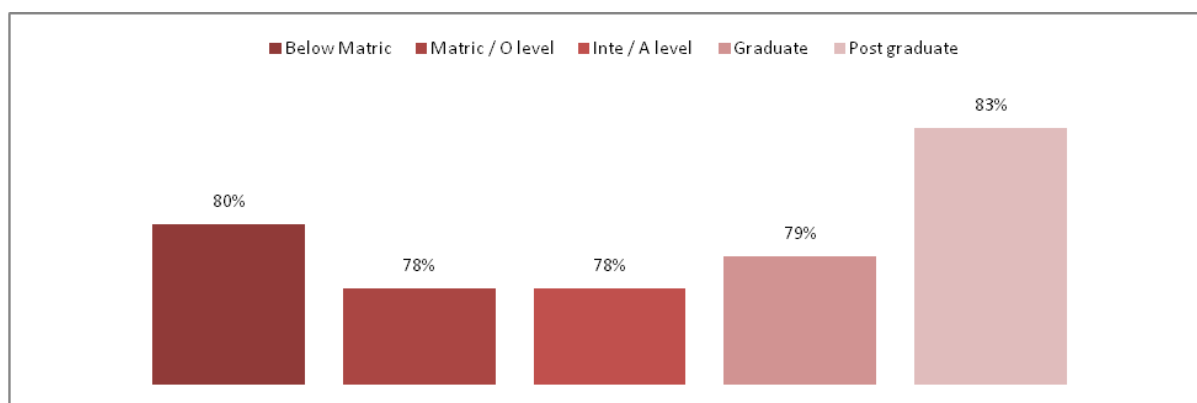
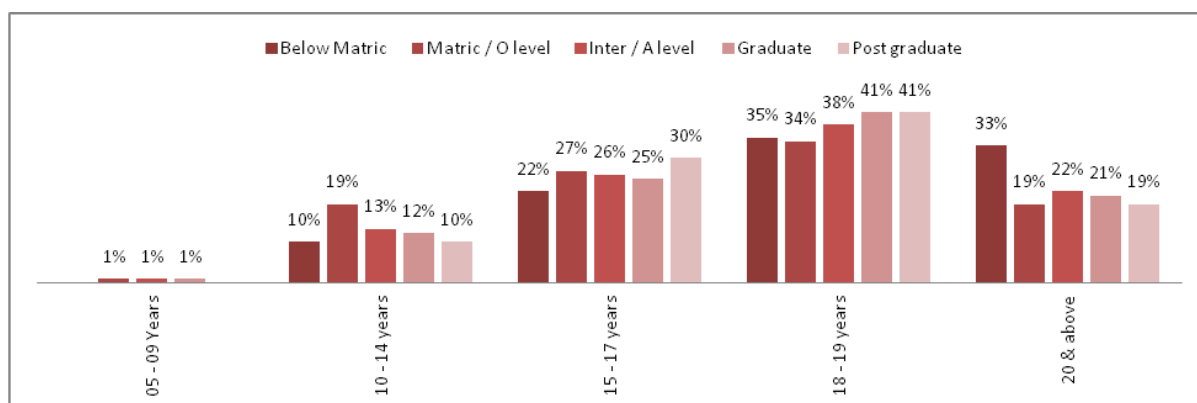


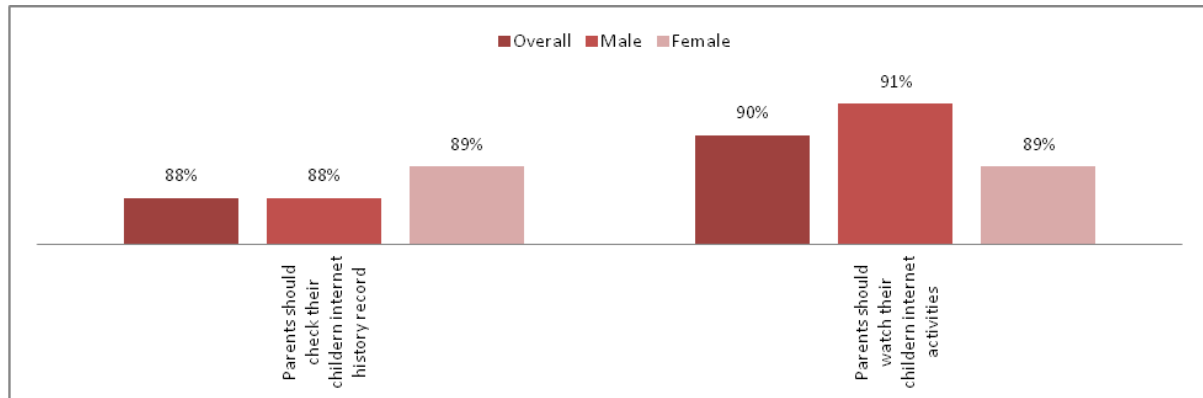
Table 6.27b: Minimum age restriction suggested, by level of education

Base: Urban Respondents who agree with the imposition of a minimum age for a child to access the Internet



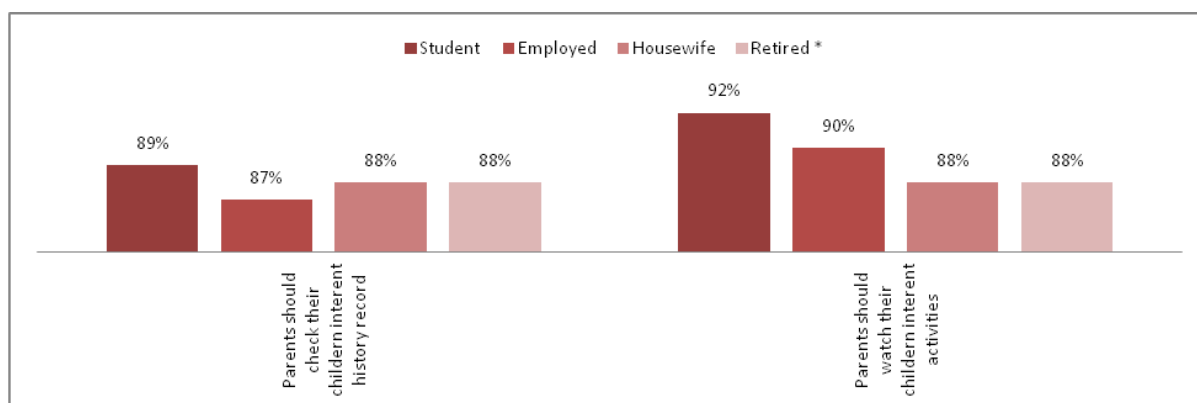
More postgraduates (83%) than other lower level educational groups are in favor of a minimum age of children to have access to the internet [Fig 6.27a]. More than one third of all level of education suggested the minimum age of children should be 18 to 19 years. Other 33% of below Matric respondents said that the minimum age for a child to have access to the internet should be 20 years & above [Fig 6.27b].

Table 6.28: Overall and gender-wise attitudes towards monitoring children's online activities



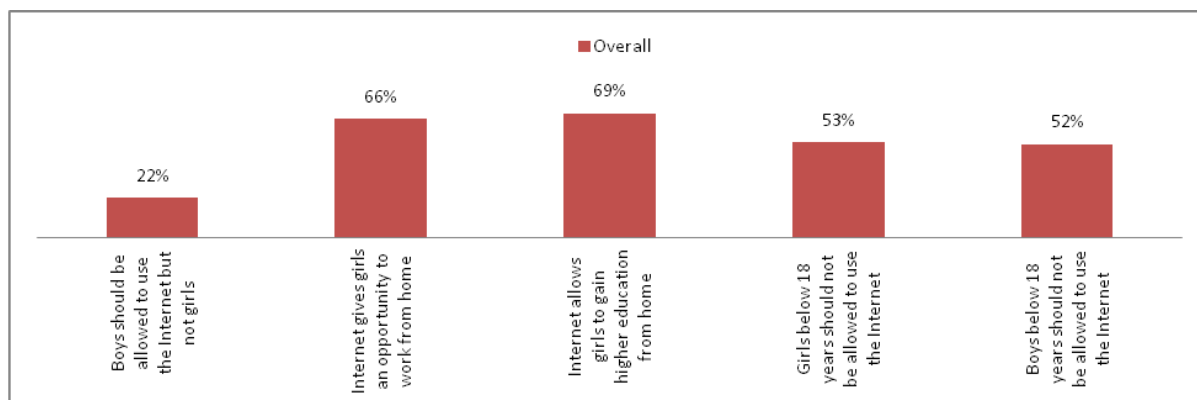
Most of the respondents (overall 88%, males 88% & females 89%) agree or strongly agree with the statement that “Parents should check their children’s internet history” and for the statement “Parents should watch their children’s internet activities”.

Table 6.29: Attitudes towards monitoring children's online activities, by life stage



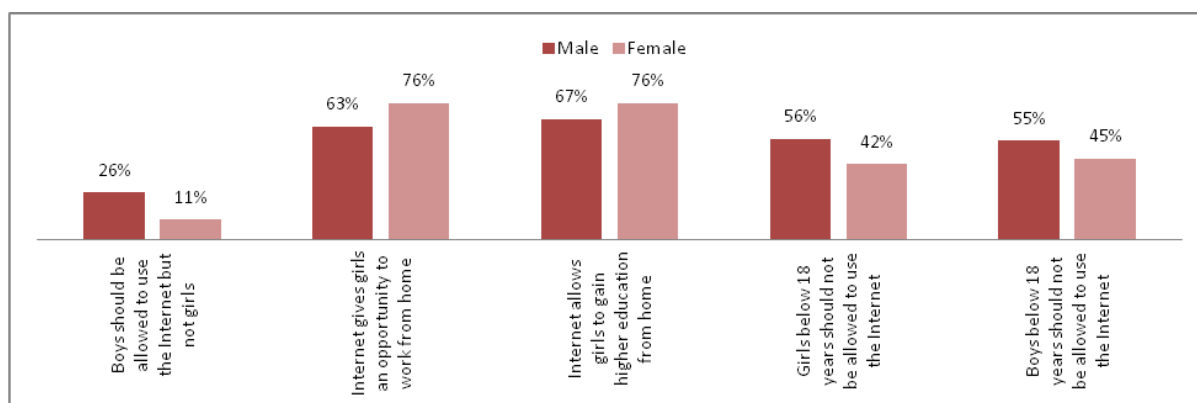
More than 85% of each group of people agree or strongly agree with the statements “Parents should check their children’s internet history” and “Parents should watch their children’s internet activities” [Fig 6.29].

Table 6.30: Extent of gender bias prevalent for internet usage, overall



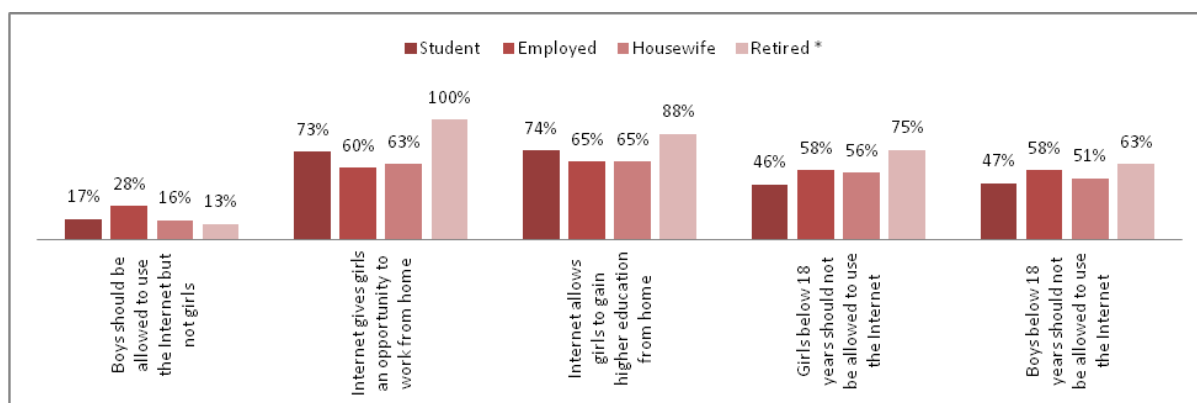
Respondents seemed to have low gender bias for internet usage. 69% of respondents agreed that the internet provides opportunities for girls to gain higher education at home. Only 22% of the respondents felt that only boys should be allowed to use the internet. Girls less than 18 years of age should be prohibited to use internet.

Table 6.31: Extent of gender bias prevalent for internet usage, by gender



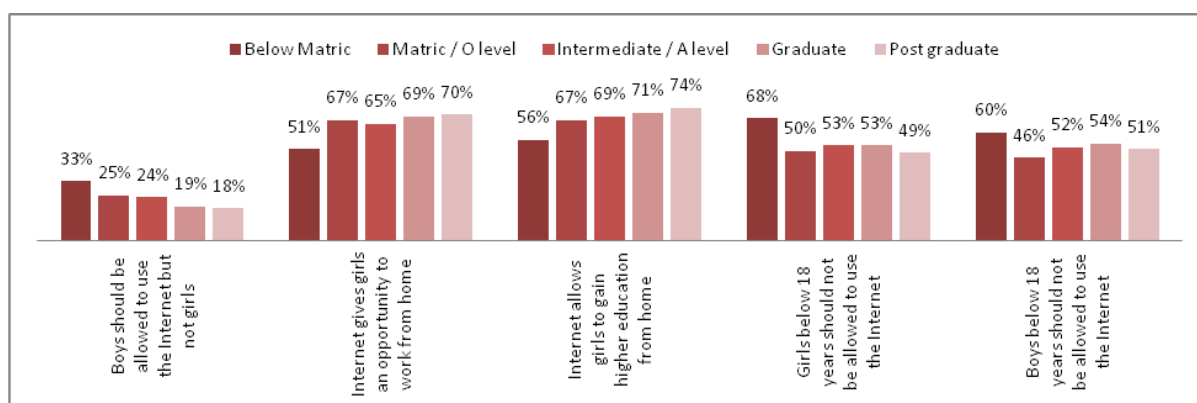
Males reported more of a gender bias towards internet usage vs. females. However, a disappointing 11% of females still felt that girls should not be allowed to use the internet.

Table 6.32: Extent of gender bias prevalent for internet usage, by life stage



Students showed the least gender biasness towards internet usage, while employed persons showed the most.

Table 6.33: Extent of gender bias prevalent for internet usage, by level of education



As expected, gender bias decreases as the education level increases.

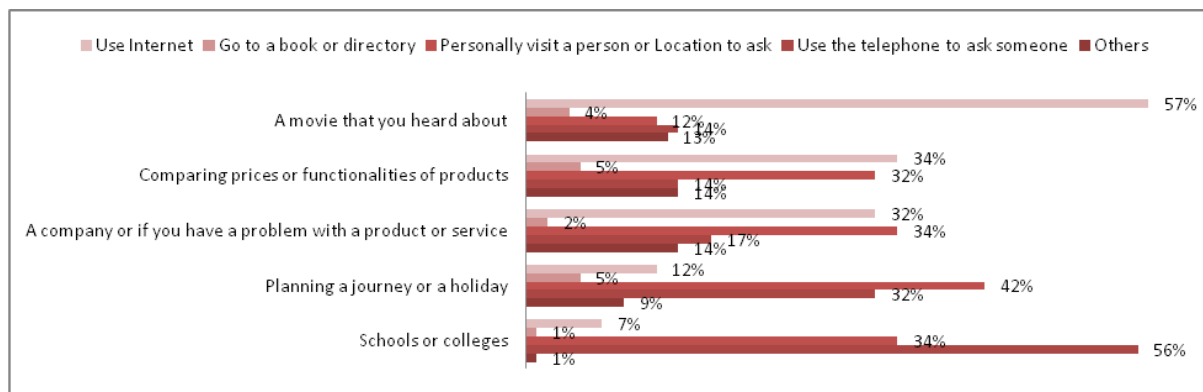
Rural Access

Overall, Net access is lower in rural Pakistan than is seen in urban areas. However, most of the actual users are more likely (92%) to gain access via mobile phones as their primary devices, although this only amounts to about 37% of overall respondents. A huge percentage (90%) use the Net daily, mostly to access information about movies and other forms of entertainment, and even more so for information about sports. For categories of entertainment like films, over half consider the Net to be their first choice, more than television, newspapers or any other, for getting information. With chat the most accessed means of communication, more than half of all respondents consider that their lives have improved in terms of being able to stay in touch with family and friends.

One the other hand, the environment leads them to look least for information about schools/colleges.

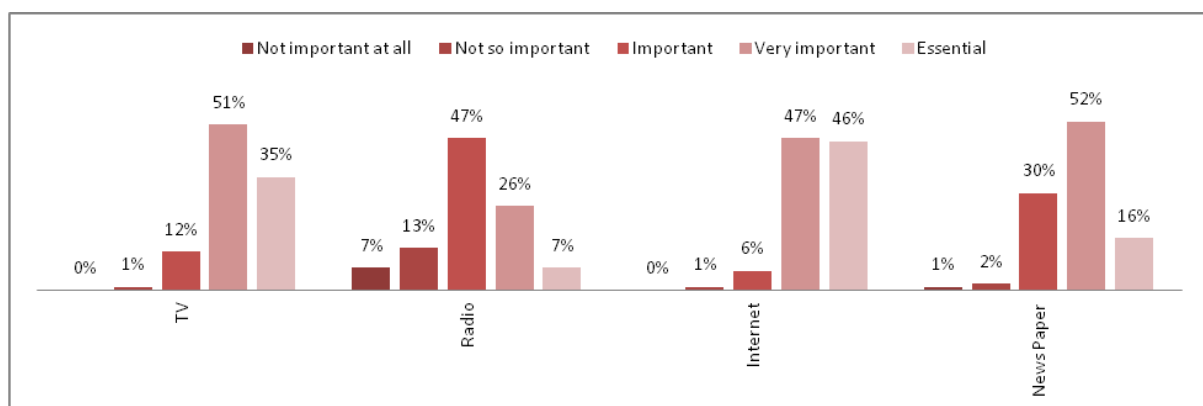
Unlike the urban respondents, only 7% of the polled group were women, hence questions about attitudes and so are not as relevant to analyse in terms of gender biases. The overall age was also heavily skewed towards younger respondents, three quarters of whom were below 35.

Table 7.1: Sources of data used overall



57% of the rural respondents use internet as the first source of information for finding out about movies that they had heard about. The least frequent use of the internet as a first source of information (7%) is information seeking on school & colleges.

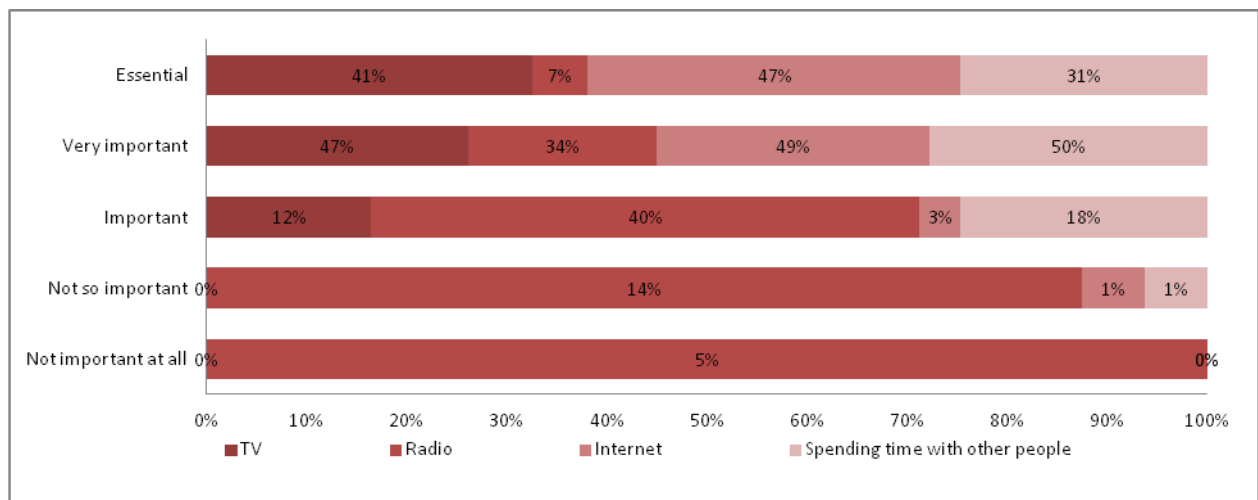
Table 7.2: Importance of traditional media and the internet as information sources



The internet is very important and essential source of information for more than 90% of the rural respondents followed by TV with 86% and newspaper with 68%. [Fig 7.2]

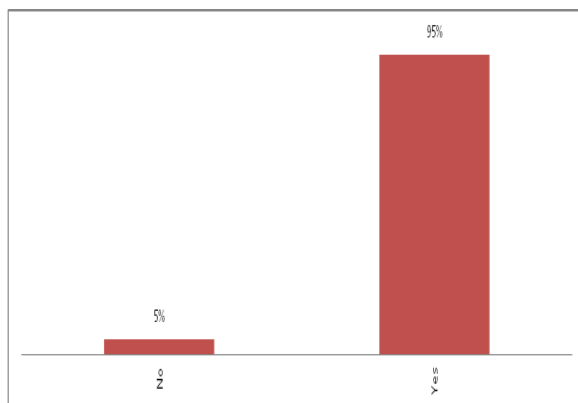
Table 7.1: Mobile phone and sim usage combinations

Table 7.3: Importance of traditional media and the internet as entertainment



The internet is a very important and essential source of entertainment for more than 90% of the rural respondents followed by TV with 88% and spending time with other people with 81%.

Table 7.4a: Mobile phone ownership – Rural



Number of Mobile phones

Just one -single SIM phone	68%
Dual SIM phone	28%
Two Mobile Phones	4%

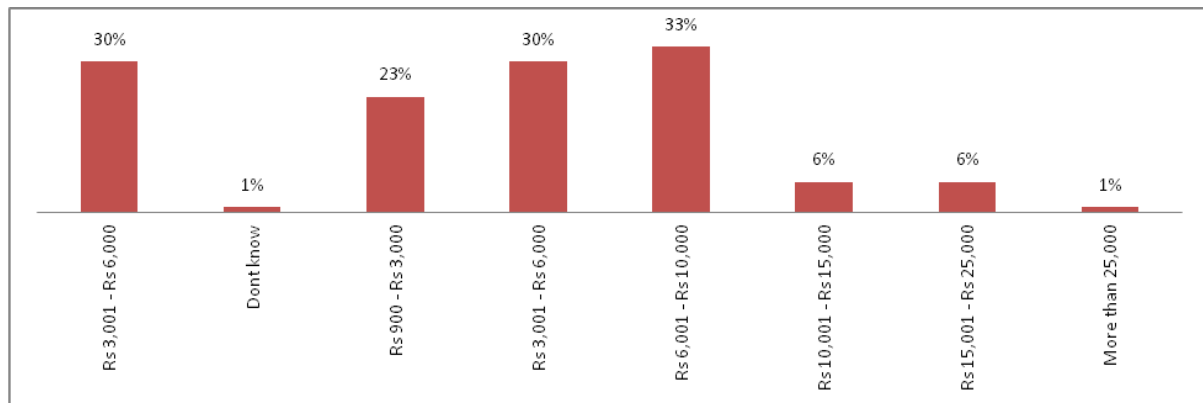
Mobile phone type

Simple basic phone to make calls/send texts	29%
Phone with color /Bluetooth or Wi-Fi	65%
Blackberry	5%
i-Phone	1%

Table 7.4b: Mobile phone usage combinations

95% of the rural respondents have mobile phones [Fig 7.4a]. Among them 28% have a dual SIM mobile phone [Fig. 7.4b] and 65% have a phone with color screen / Bluetooth/ Wi-Fi. 5% of rural respondents claim that they have a BlackBerry. [Fig. 7.4b]

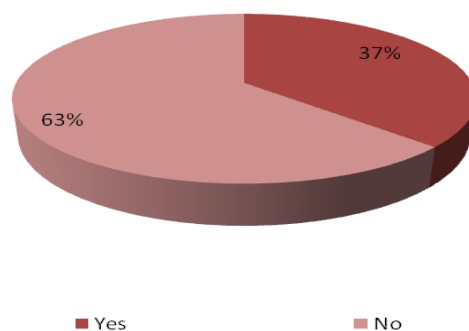
Table 7.5: Prices of mobile phones currently owned



Most of the respondents (86%) own mobile phones worth up to PKR 10,000, while 6% of the respondents own mobile phones worth PKR 10,000 to PKR 15,000 and other 6% of the respondents own mobile phones worth PKR 15,001 to PKR 25,000.

Table 7.6: Overall usage of mobile internet

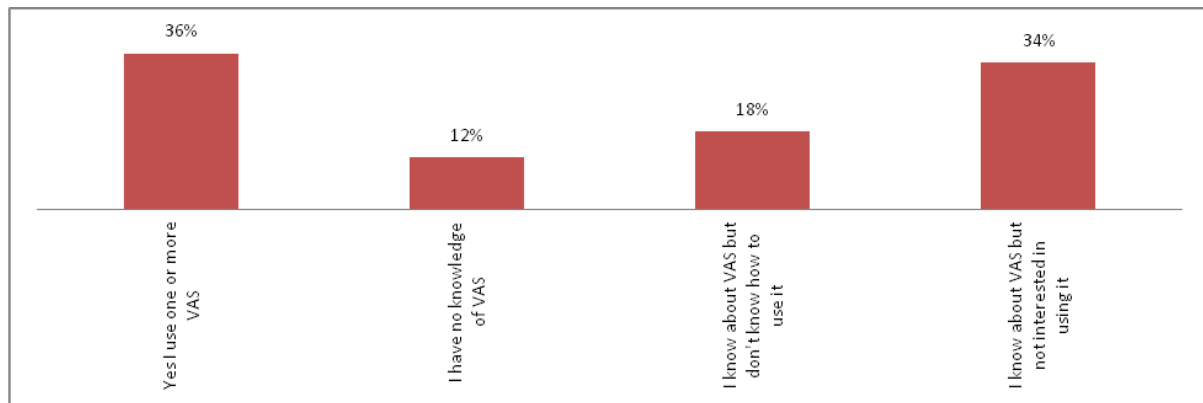
Base: 276



37% of the respondents use the internet on their mobile phones in rural Pakistan and 35% of the urban respondents use internet on their mobile phones.

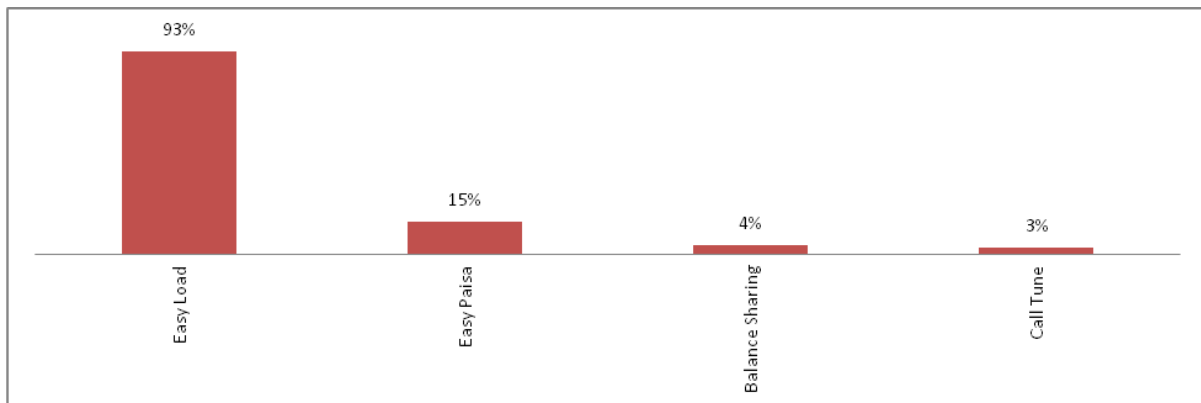
Table 7.7: Awareness and usage of VAS

Base: 276



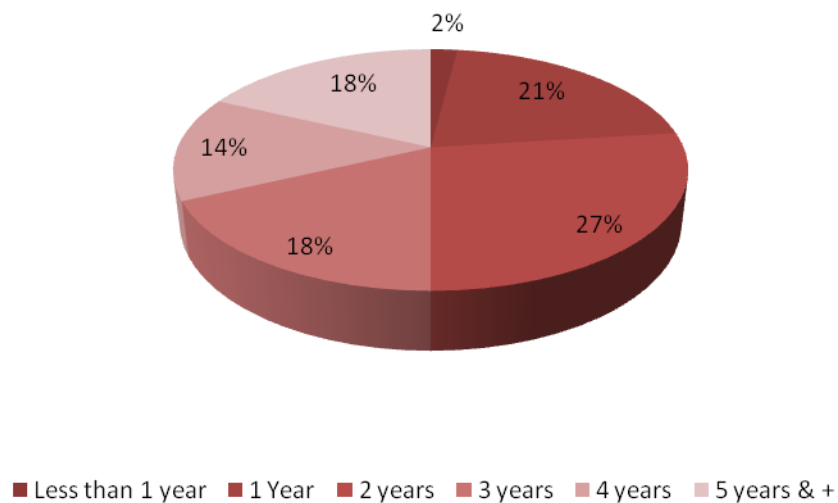
36% of the respondents claimed that they use one or more value added services (VAS), while others have no knowledge or are not interested in using VAS.

Table 7.8: Most commonly used VAS (Top 3)



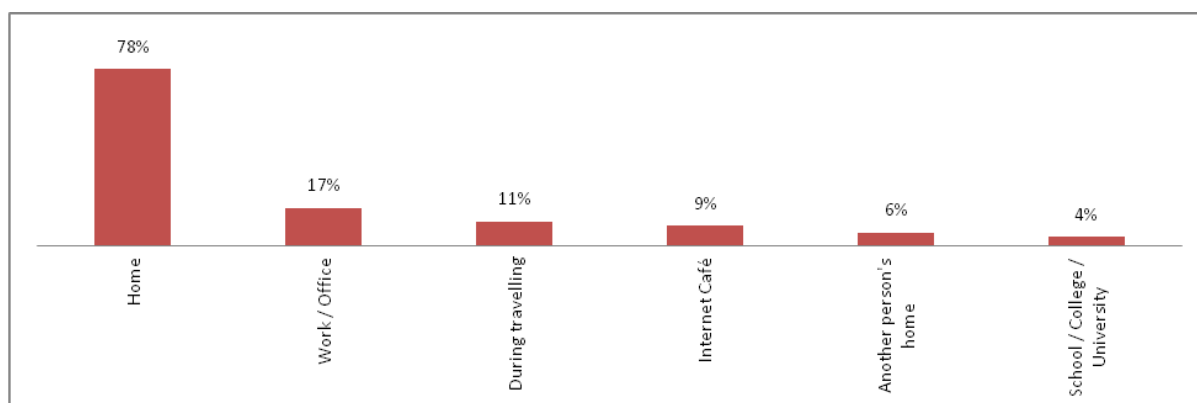
93% of the VAS users use Easy load and 15% of the VAS users use Easy Paisa.

Table 7.9: How long have you been using the internet?



50% of the respondents have been using the internet for the last 2 years or less. 18% of the respondents have been using the internet for the last 5 years or more.

Table 7.10: Where is the internet accessed from



Most of the respondents (78%) use the internet at their home, 17% use the internet at work/office and 11% during travelling. Only 4% use the internet at school. While in urban areas, 87% use the internet at their home, 21% use the internet at work/office, 6% during travelling, 9% at school and 8% use the internet at net café.

Table 7.11a: Devices used to access the internet

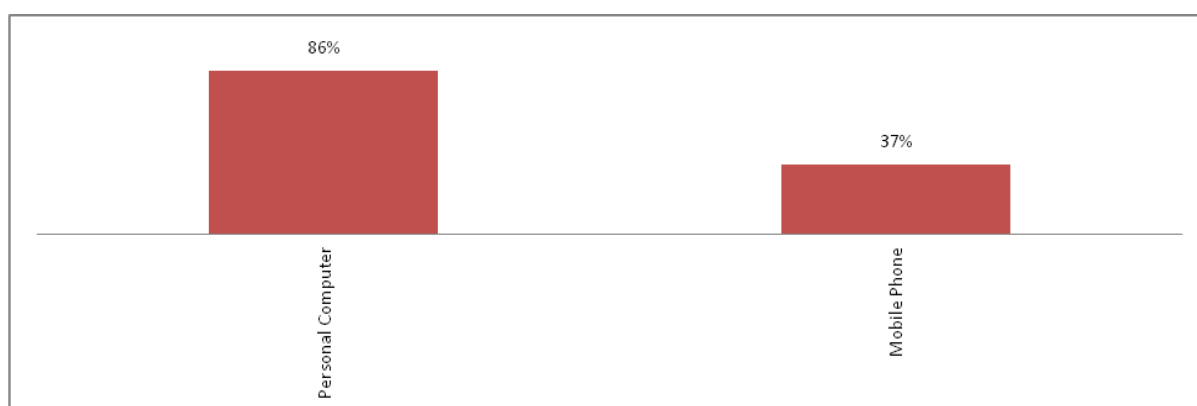
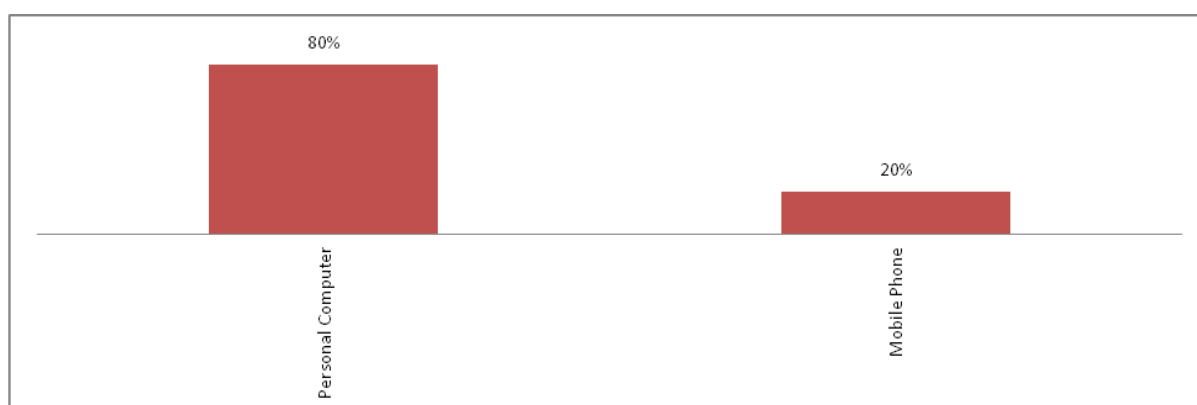
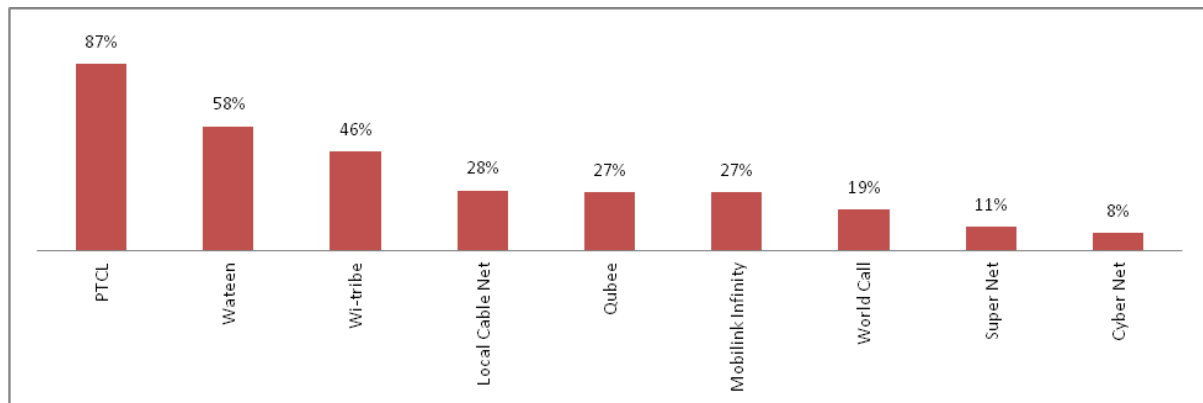


Table 7.11b: Devices used the most to access the internet



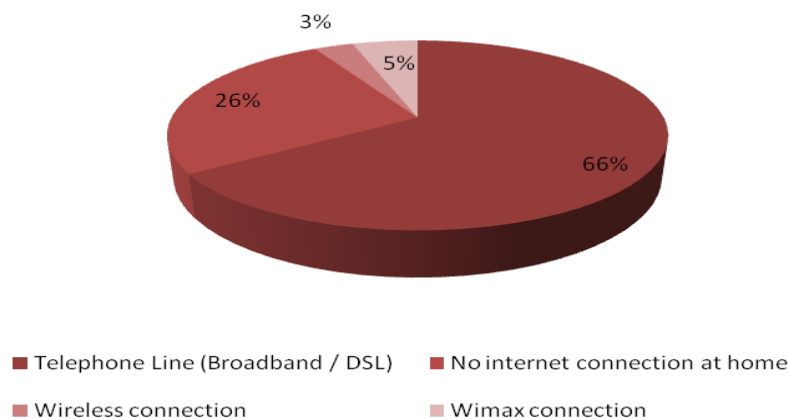
In rural Pakistan, 86% of the respondents use the internet through a PC/Laptop [Fig 7.11a]. While 37% in rural respondents use the internet through a mobile phone. 20% of rural [Fig 7.11b] respondents use the internet mostly through a mobile phone.

Table 7.12: Available ISPs



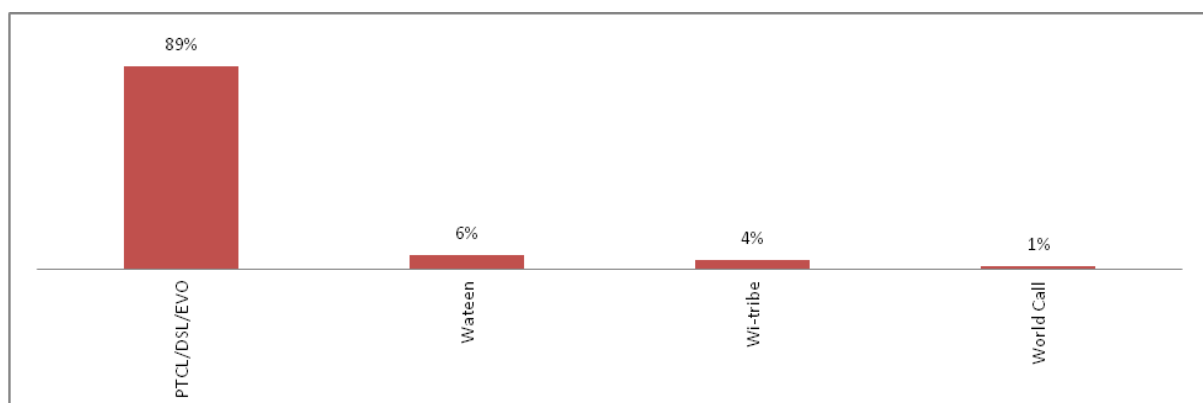
PTCL is the most widely available service provider in rural Pakistan according to 87% of the respondents followed by Wateen at 58% and Wi-tribe at 46%.

Table 7.13: Types of access at home



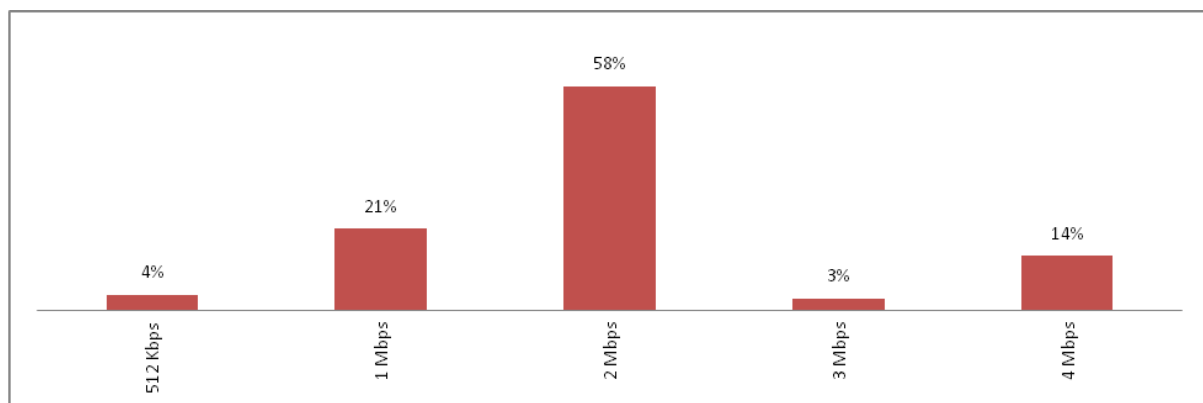
65% of the rural respondents use the internet through a telephone line, while 26% of the respondents do not have an internet connection at home.

Table 7.14: ISPs used by respondents at home



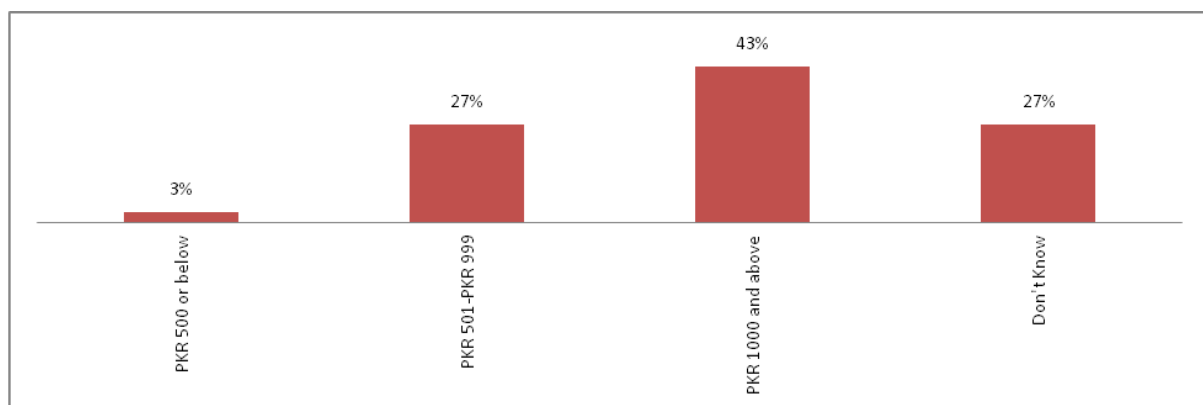
PTCL is the leading service provider in rural Pakistan with 89% usage.

Table 7.15: Speed of internet connection Base: 214



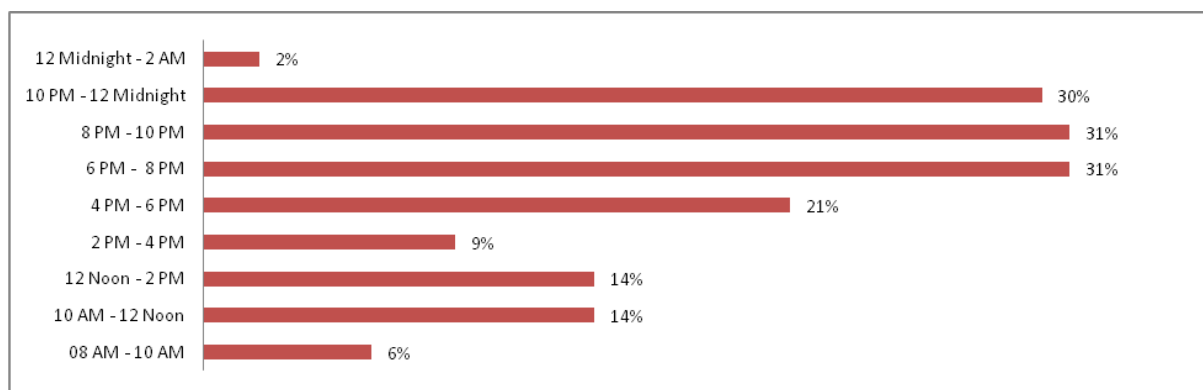
58% of the respondents claim to receive a 2 Mbps internet connection.

Table 7.16: Overall monthly expenses of internet access Base: 214



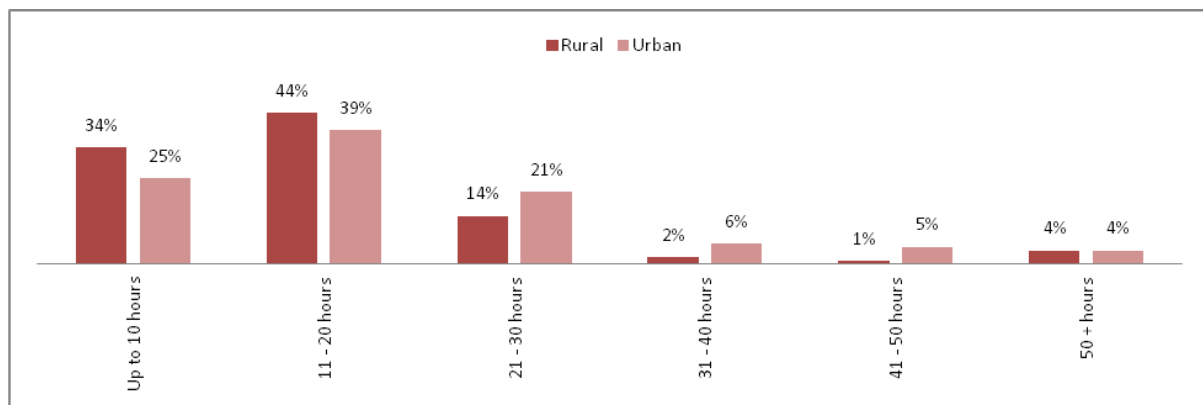
43% of the respondents pay Rs. 1000 and above for their internet connection, while 30% pay below Rs. 1000. 27% of the respondents do not know how much they pay for their internet connection.

Table 7.17: Most likely time slots to be online in, overall



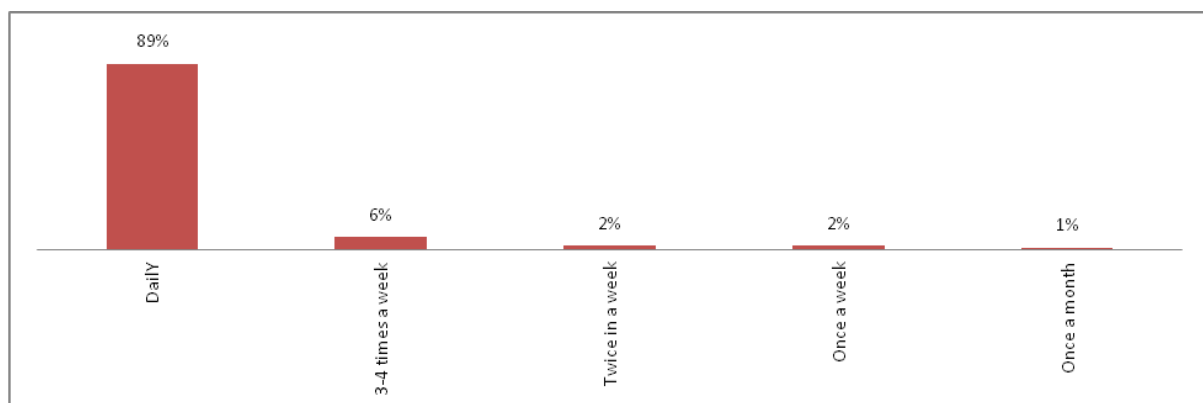
Most of the respondents are most likely to be online from 6 pm to midnight. One third of the respondents are likely to be online in the morning.

Table 7.18: Time spent online in a week: Rural vs urban



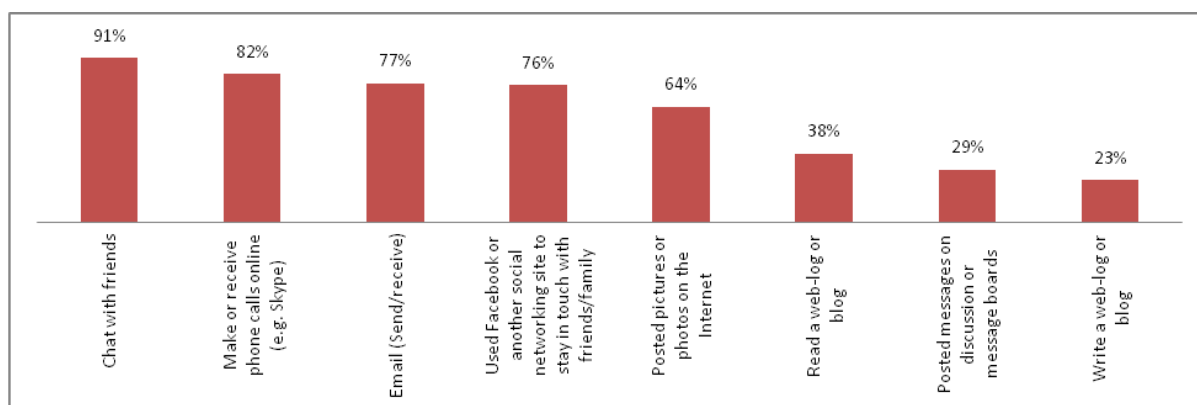
More rural than urban respondents use internet for a shorter period of time in a week (up to 20 hours). 34% of rural and 25% of urban respondents use the internet up to 10 hours in a week. 44% of rural and 39% of urban respondents use the internet for 11 to 20 hours in a week. 14% of rural and 21% of urban respondents use the internet for 21 to 30 hours in a week.

Table 7.19: Frequency of internet usage



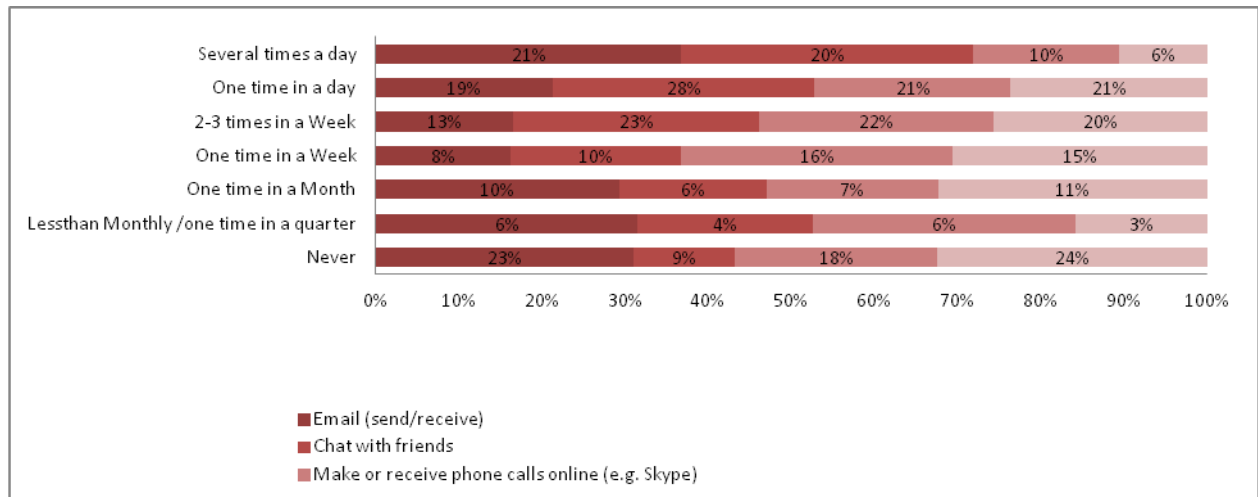
Most of the respondents (89%) use the internet daily.

Table 7.20a: Types of creative and online communication used



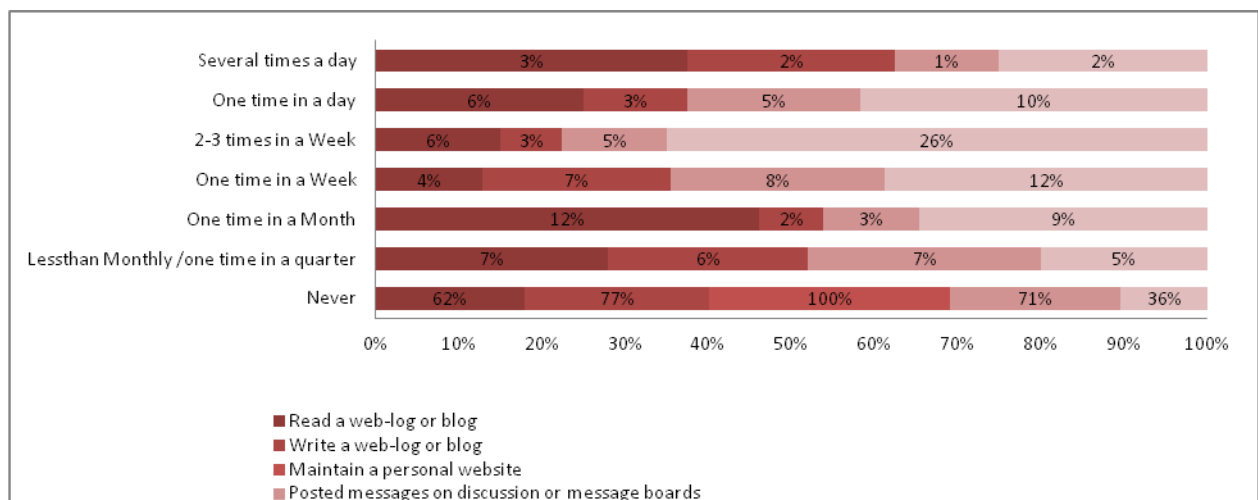
Chatting with friends (with 91%) is the most common purpose of online communication followed by making or receiving calls (e.g. with Skype) with 82%.

Table 7.20b: How frequently engaged in online creative activities



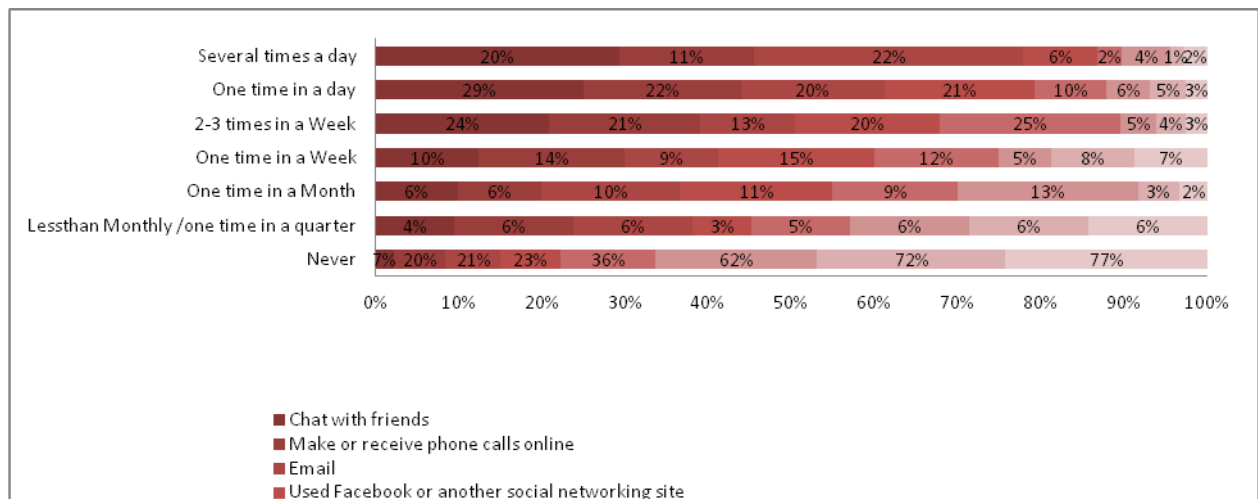
Chatting with friends was the most exciting activity for rural internet users as they enjoyed it daily (28%) multiple times a day (20%). The daily frequency was also high for social networking and online calls (21%) followed by emails (19%). Sending and receiving emails was done multiple times a day, whereas Skype and Facebook were used more on a weekly basis (38% vs. 35%).

Table 7.20c: How frequently various methods of online communication are used



Rural users were less creative in all content based production and just actively participated in posting pictures on social or other websites. 12% of the users followed this daily, whereas 38% engaged in this activity on a weekly basis. 9% of the users read web blogs daily and only 5% write any blog on internet in a day. 13% of the users posted messages on discussion boards weekly.

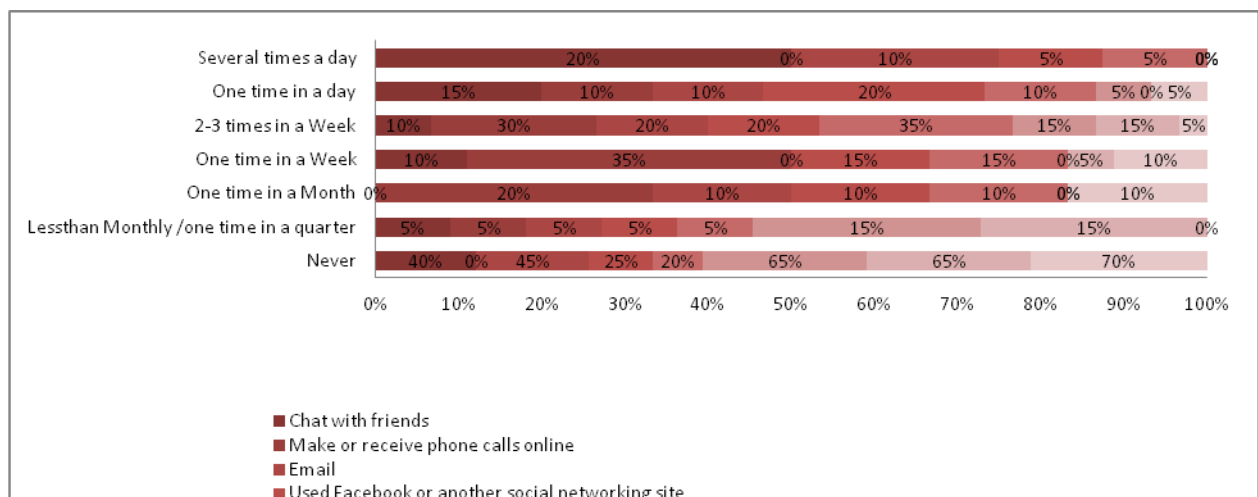
Table 7.21a: Frequency of creative activities and online communication – Male



Overall chatting (49%) was the most participating daily activity for males followed by sending/receiving emails (42%) and making online calls (33%). However, weekly share was high for posting pictures (37%) and using Facebook (35%).

Table 7.21b: Frequency of creative activities and online communication –Female

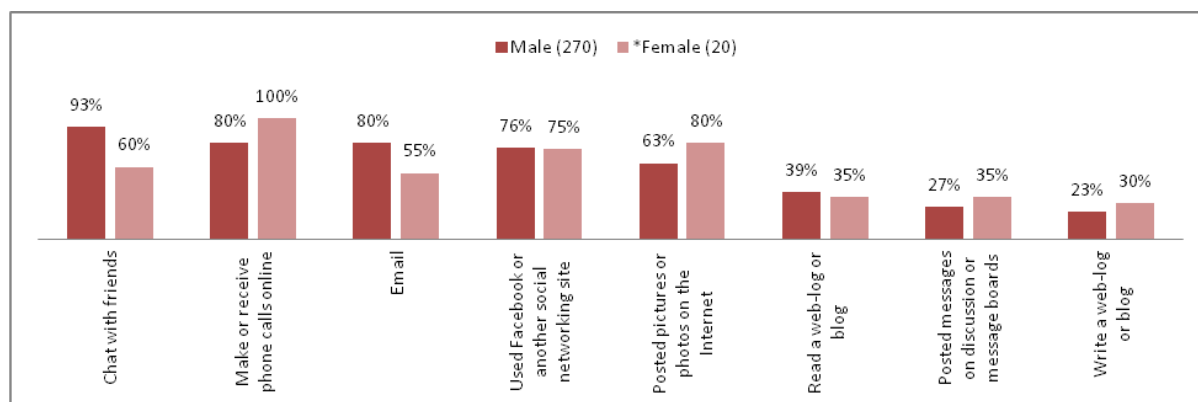
* Base less than 30 is not significant for statistical analysis



Overall females preferred chatting during the day but the most participating daily activity for females was to make or receive phone calls online.

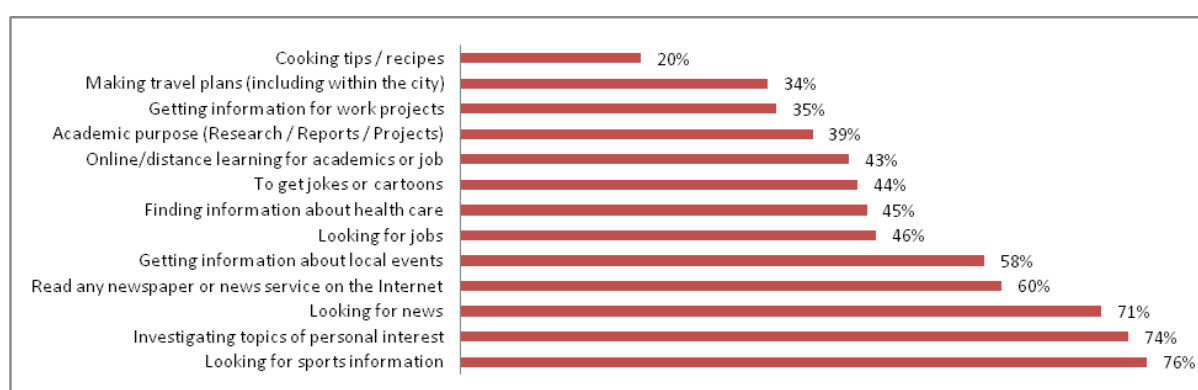
Table 7.21c: Types of creative and online communication used, by gender

* Base less than 30 is not significant for statistical analysis



More males (93%) than females (60%) chat with friends, while more females (100%) as compared to males (80%) make online calls to talk with friends and family. Sending/receiving of emails is more common in males (80%) than females (55%). [Fig7.21c]

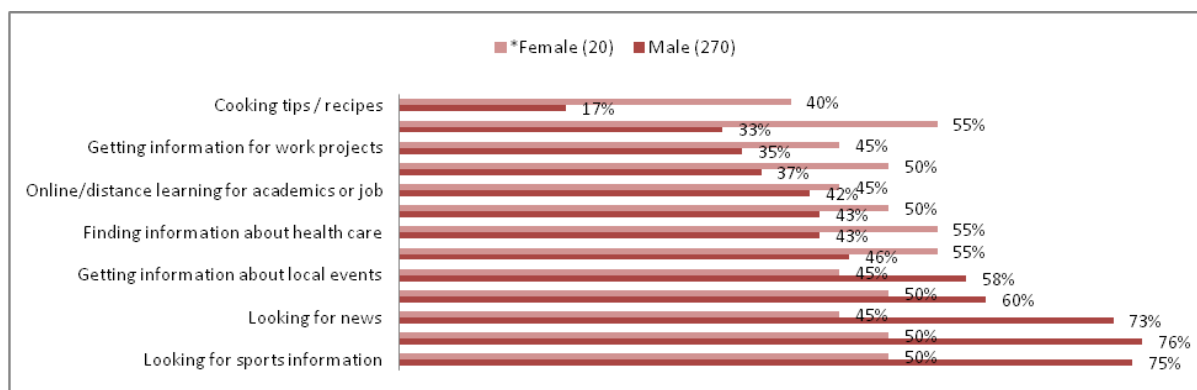
Table 7.22a: Types of information seeking online, overall



Overall both the genders looked for sports information online (76%) followed by investigating topics of personal interest (74%) and looking for news (71%). They also use the internet to read newspapers online (60%) and find out information on local events (58%).

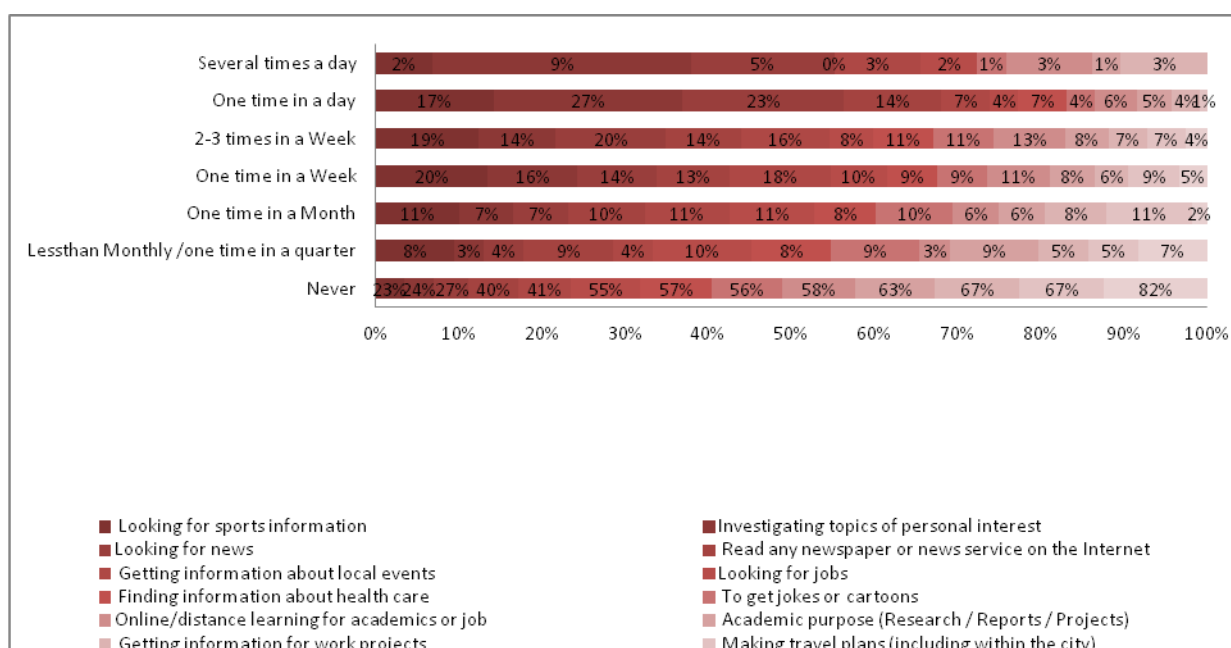
Table 7.23a: Uses of the internet, by gender

* Base less than 30 is not significant for statistical analysis



Getting sports information, topics of personal interest, looking for news, newspaper or news service and searching for local events are more common in males than females. Looking for job, getting information about health, jokes or cartoons, academic purpose, making travel plans and cooking tips /recipes are more common in females than males.

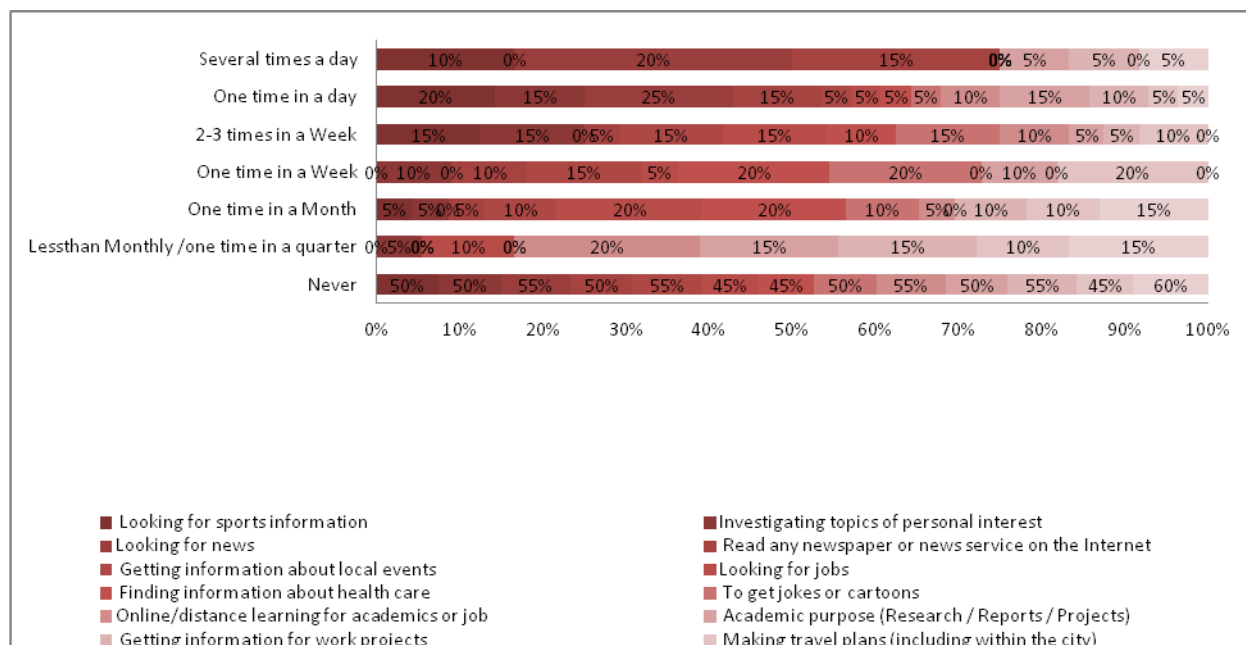
Table 7.23b: How frequently internet is used for various purposes – Male



Within the male segment, personal interest topics were the most popular type of information that they searched daily (36%) followed by news (28%). sports information (39%) and local events (34%) were the most searched weekly information among males.

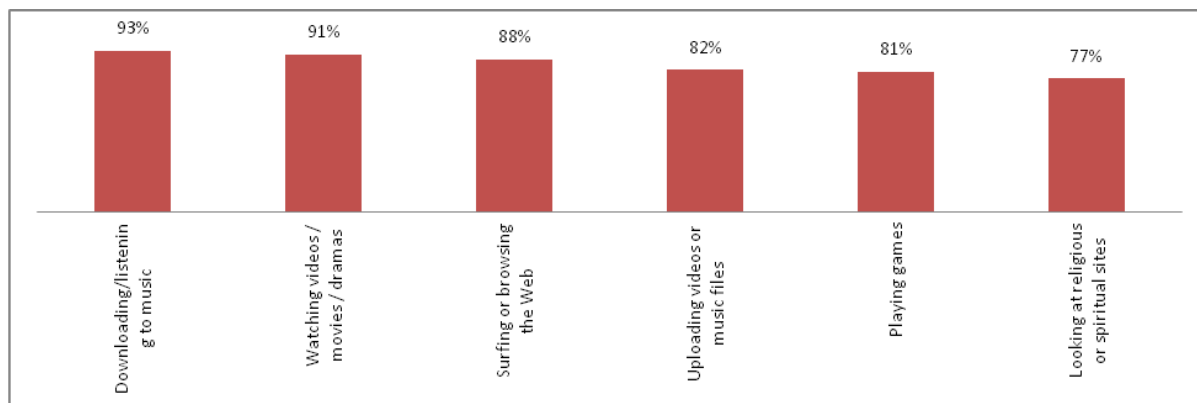
Table 7.23c: How frequently internet is used for various purposes – female

* Base less than 30 is not significant for statistical analysis



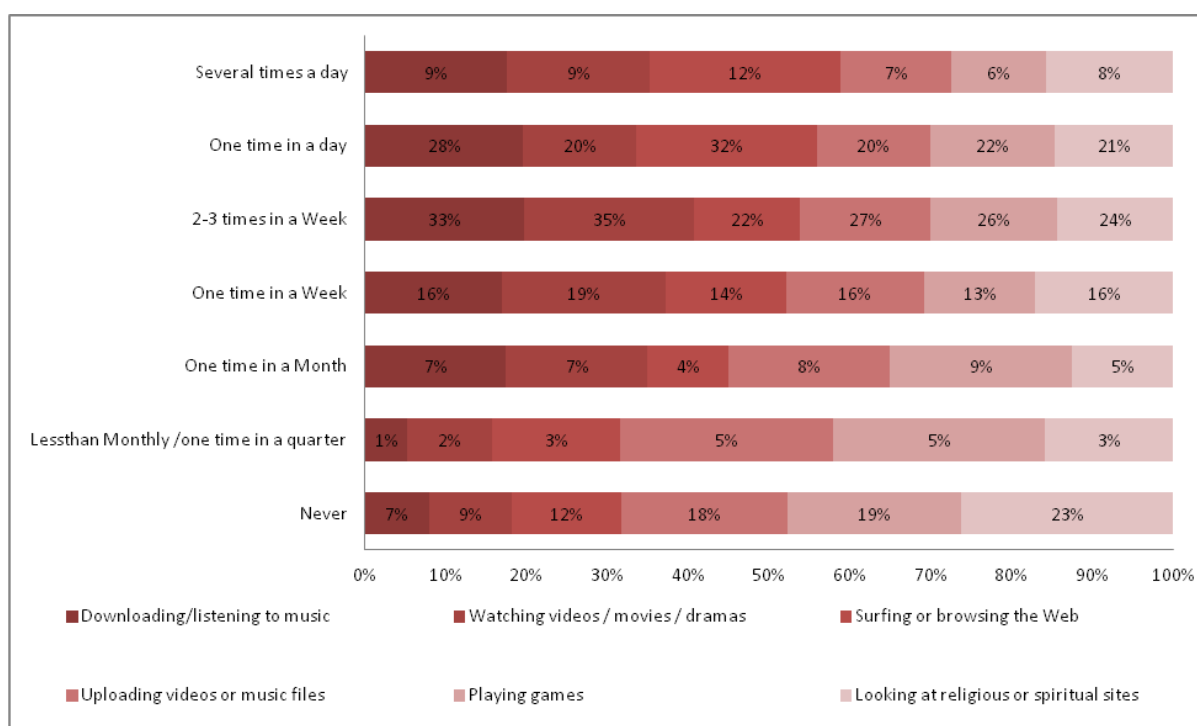
The females use the internet mostly to find out about topics of personal interest, read news online and to find out about any local events. Besides, many female users also use the internet to find information regarding sports.

Table 7.24a: Uses of the internet for entertainment, overall



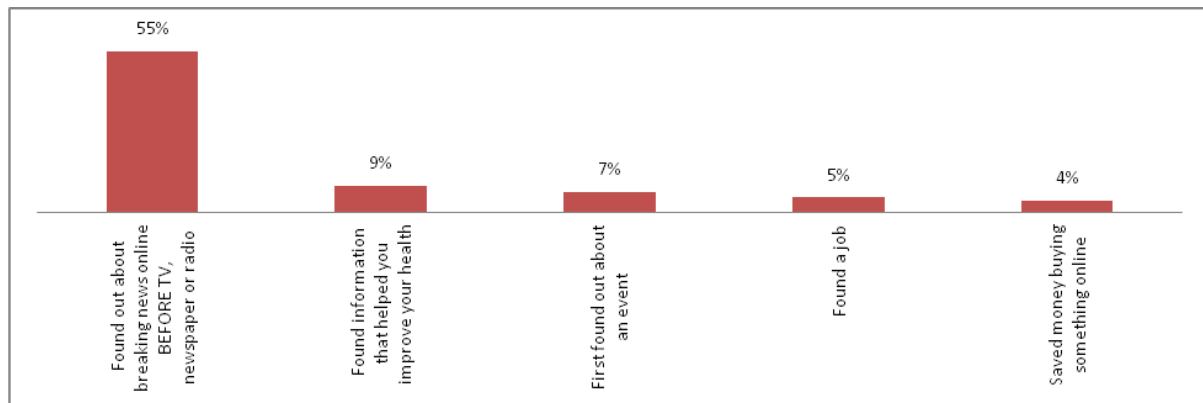
Downloading/listening to music is the leading aim of online entertainment followed by watching videos / movies / dramas.

Table 7.24b: How frequently internet is used for entertainment purposes, overall



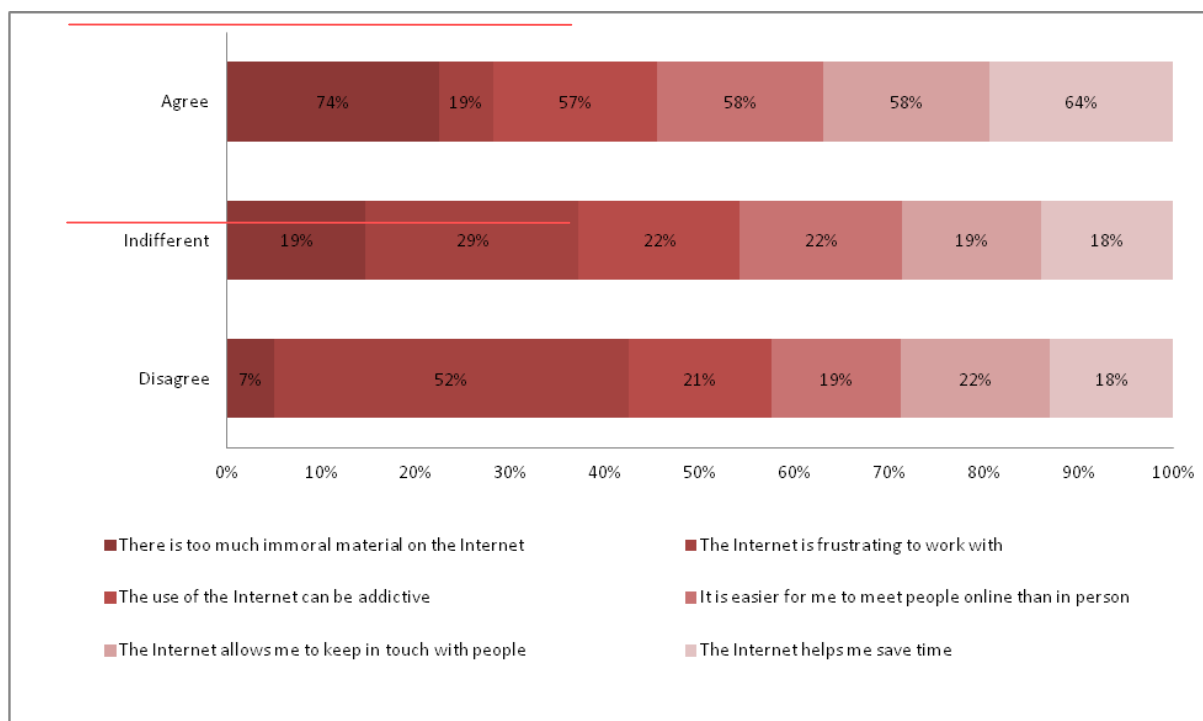
The daily share of surfing the internet was highest with once a day (32%) and several times a day (19%). Watching videos/movies/dramas (54%) got the highest weekly share followed by downloading/listening to music (49%).

Table 7.25: Internet effectiveness: Benefits obtained from internet usage



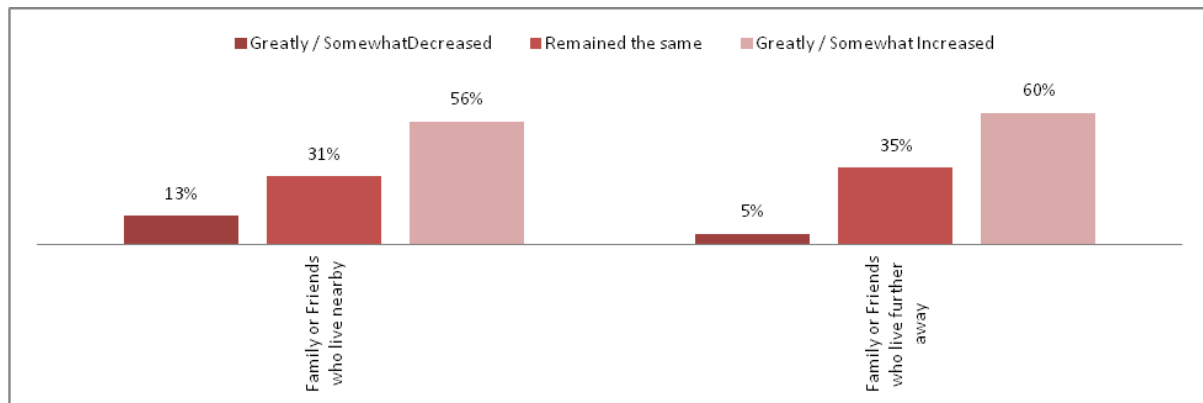
55% of the respondents found out about breaking news online before TV, newspaper or radio. While, 9% of the respondents found information that helped them to improve their health.

Table 7.26: Attitudes towards the internet



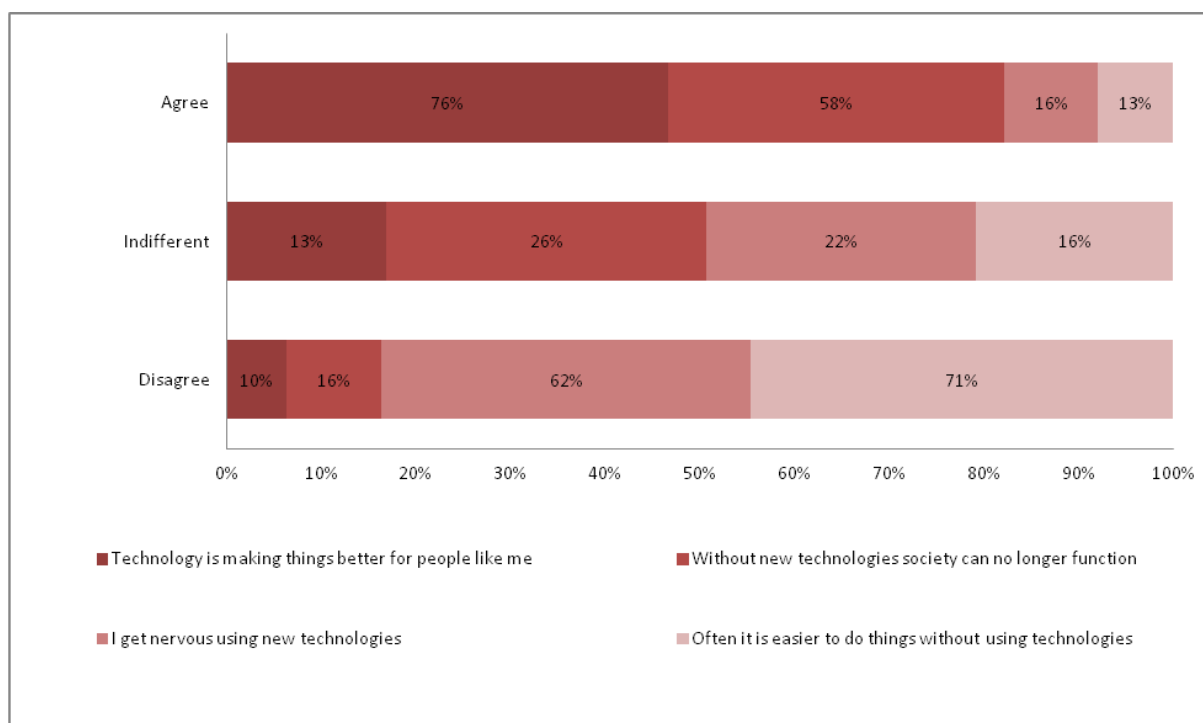
The statement “There is too much immoral material on the internet” is the most agreeable statement with 74% responses of agreement followed by “The internet helps me save time” with 64%.

Table 7.27: Impact of internet usage on offline relationships



More than half of the respondents think that the use of the internet has increased their contact with their family or friends whether they live nearby or further away.

Table 7.28: Attitudes towards technology



The statement “Technology is making things better for people like me” is the most agreeable statement with 76% responses of agreement followed by “Without new technology society can no longer function” having a share of 58%.

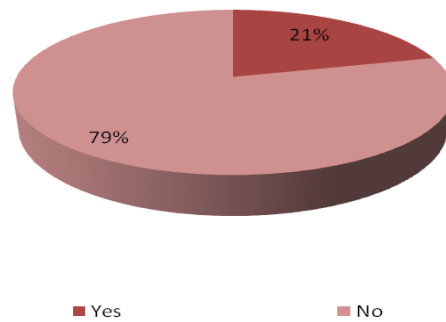
Offline

While attempting to draw a picture of the connected, and identify some characteristics that may help us establish trends going forward, we also felt it important to understand the motivation (accepting the obvious – money, but going beyond that) behind staying off the grid.

A significant number have computers at home, some of whom also have ISP service, yet choose to remain unconnected. The important reasons cited include lack of knowledge and a lack of connectivity, while for almost half of our respondents, expense was the major reason. Other reasons were cited, but in statistically insignificant numbers. The pattern of answers was similar across gender, education, and age, but amongst the economically affected, being connected emerged as an aspiration, just as much as did the negatively expressed connotations (33% 'no time', 24% 'no interest', whereas, even of those who do not actually know any English, only 37% say the Internet is something 'they do not know how to use').

Ex-users, on the other hand, express a stronger urge to get connected, with over half targeting having a connection at home within the next year. Nearly as many (40%) say they would get connected sometime in the future. However, a quarter of the non-users expressed the same sentiment, implying that the Internet is considered a necessity for some aspirational part of their lives. Word-of-mouth is an important influencer, as much as is having the opportunity to use the Net at an early age, perhaps through school-friends or at work or school.

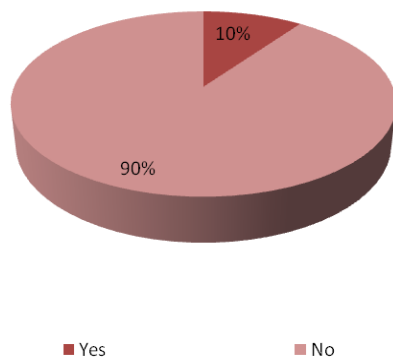
Table 8.1: Percentage of non-users of internet who have computers at their homes



21% of non-users do have computers in their homes but are not connected.

Table 8.2: Percentage of non-users of internet who have internet access at their homes

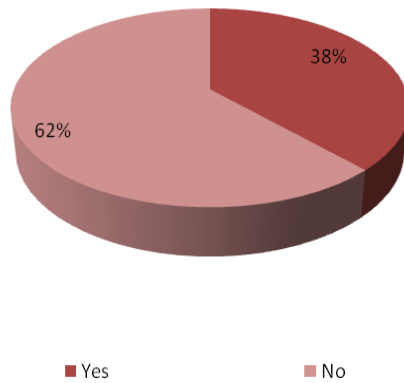
Base: n=1669



Most of the non-users (90%) do not have the facility of using internet at their home. Only 10% of the non-users have the facility of internet.

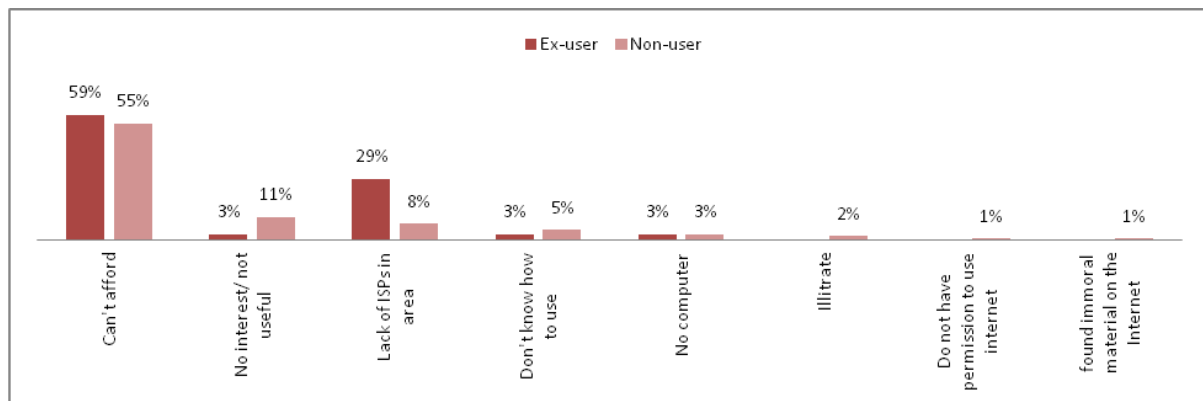
Table 8.3: Percentage of non-users of internet who have computers as well as internet access at their homes

Base: n=356(21%)



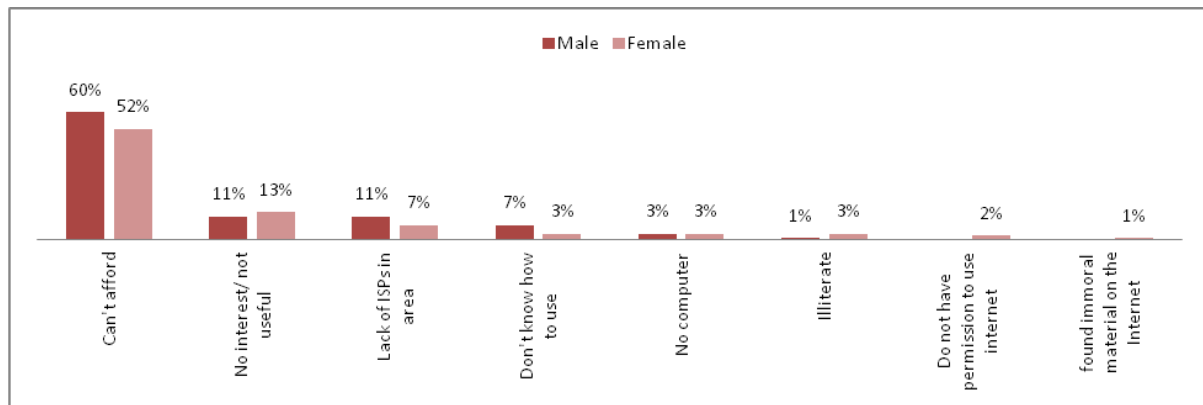
Out of those respondents who have computer at their home (356), 38% indicated that they have the facility of internet at their home.

Table 8.4: Reasons for not having internet access at home – non-user vs ex-user



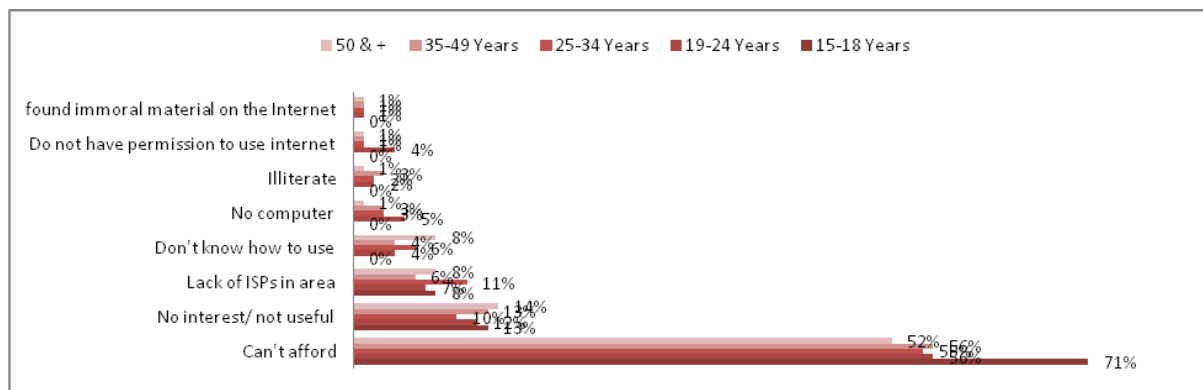
Affordability is the main reason for not having an internet connection for both non users and ex-users. 11% of non-users claimed that they do not have any interest or they did not find the internet useful. 29% of ex-users claimed that “Lack of ISPs” is the main reason for not having an internet connection.

Table 8.5: Reasons for not having internet access at home, by gender



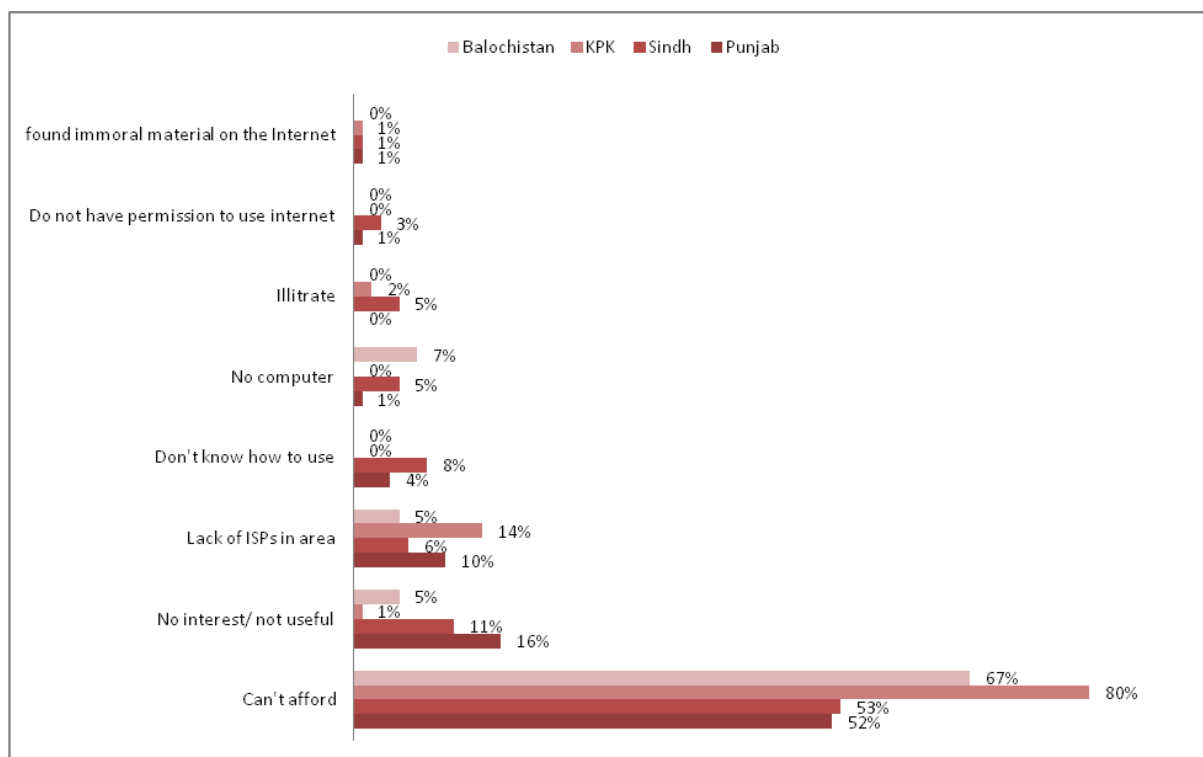
More males (60%) than females (52%) mentioned affordability problem for not having internet connection at their home. 11% of males and 13% of females claimed that they do not have any interest or they did not find the internet useful.

Table 8.6: Reasons for not having internet access at home, by age



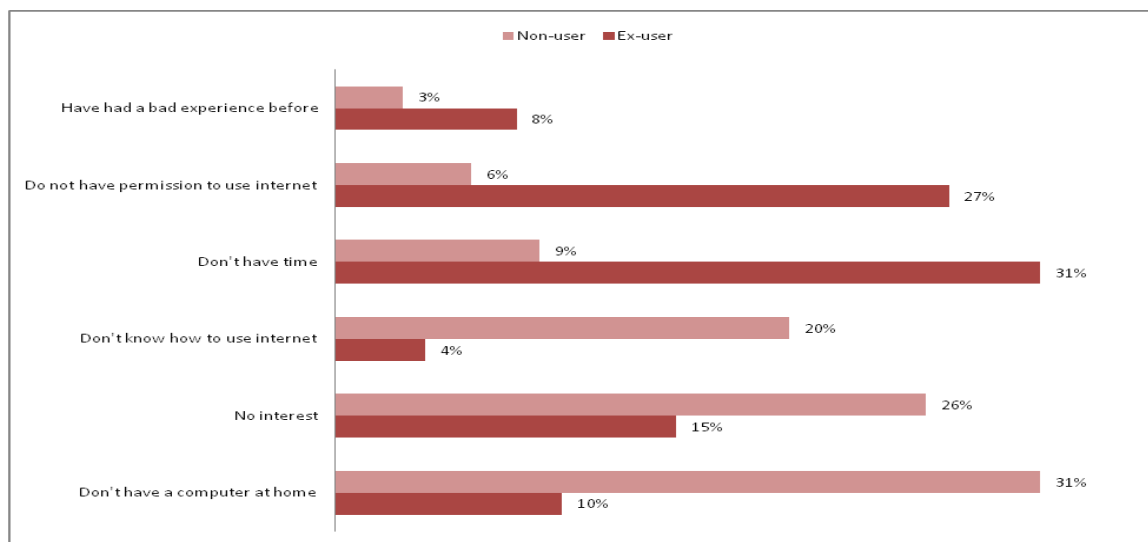
71% of respondents of age 15-18 years and more than half of each of remaining age groups mentioned affordability problem for not having an internet connection. Less than 15% of each age group did not find internet useful and have no interest in using the internet at all.

Table 8.7: Reasons for not having internet access at home, by province



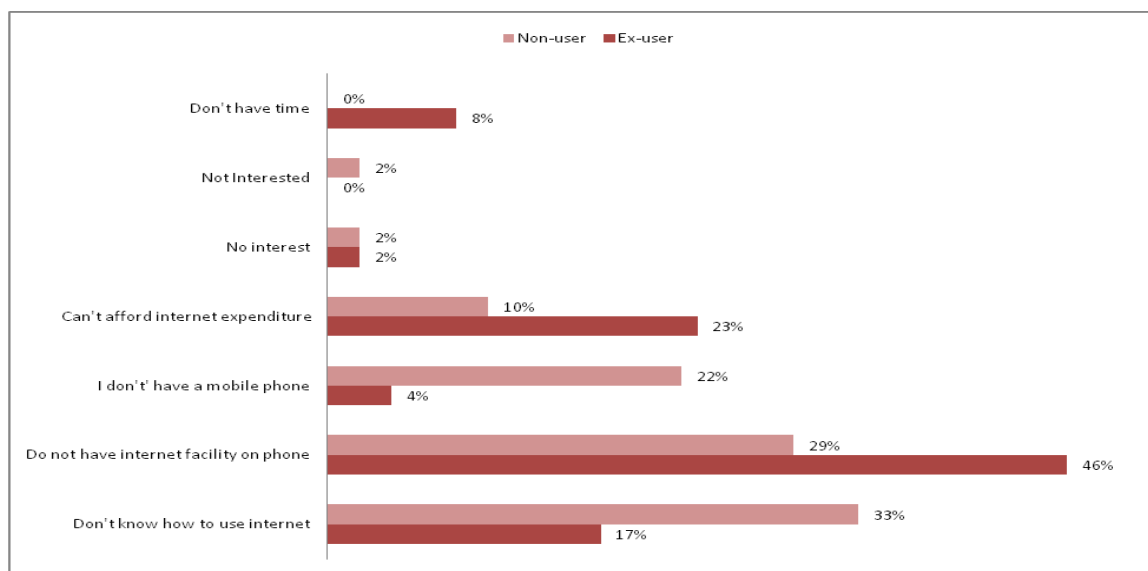
Khyber Pakhtunkhwa is the region where mostly (80%) non-users/ex-users can not afford internet expenses. In Baluchistan, two third (67%) of the non-users / ex-users can not afford internet expenses. 16% of Punjab and 11% of Sindh non-users/ex-users do not have any interest in using the internet.

Table 8.8: Top reasons for not accessing internet via computers (ex-users vs non-users)



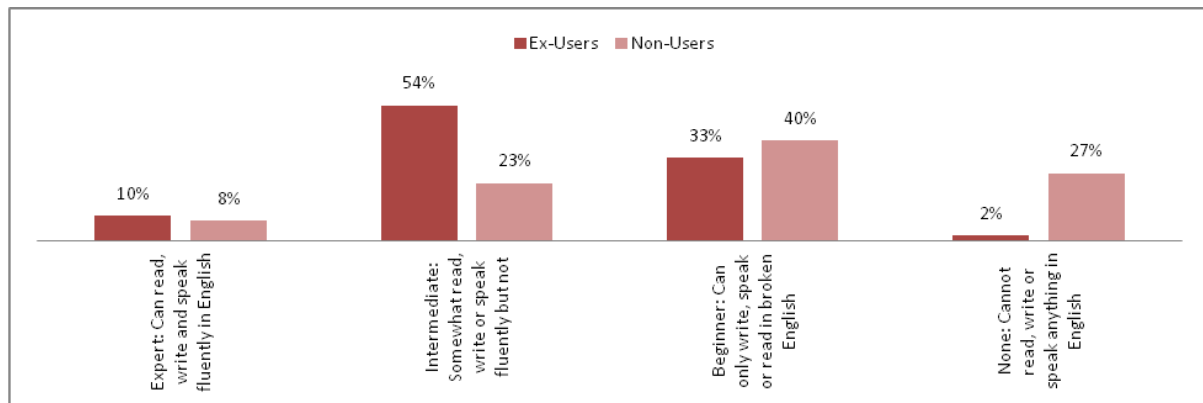
Just less than one third (31%) of the non-users and 10% of ex-users claimed that the main reason for not using the internet is that they do not have a computer at home. 31% of ex-users and 9% of the non-users mentioned that they do not have time to use the internet. One fourth (26%) of non-users claimed that they have no interest in using the internet.

Table 8.9: Top reasons for not accessing internet via mobile phones (ex-users vs non-users)



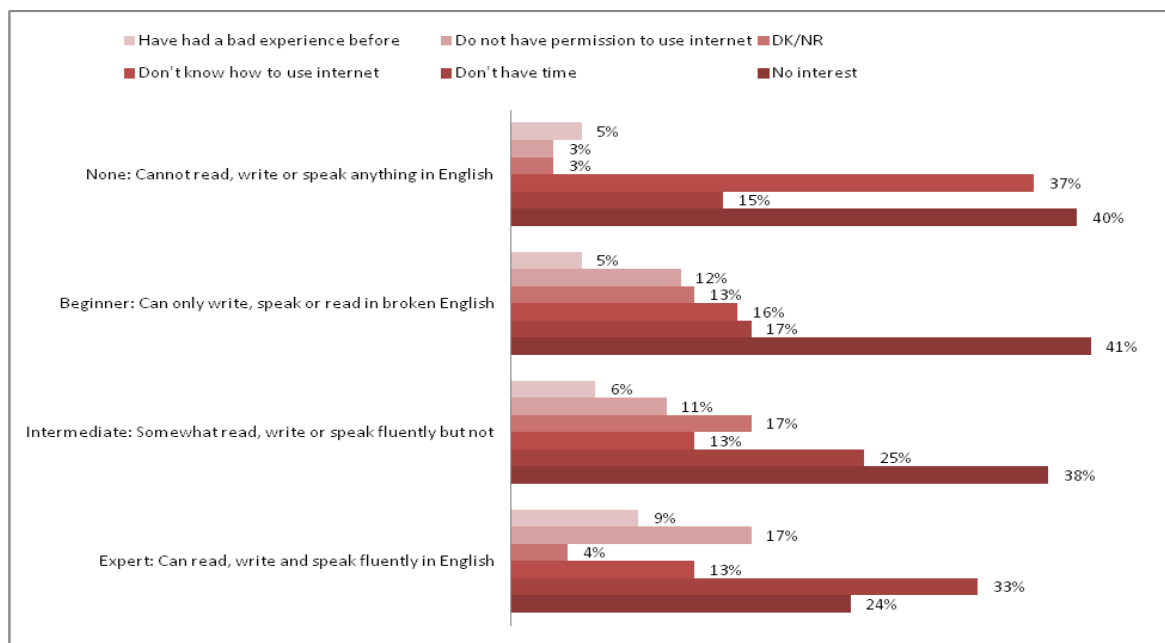
One third (33%) of the non-users claimed that the main reason for not using the internet is that they do not know how to use the internet through a mobile phone. 29% of the non-users and less than half (46%) of the ex-users mentioned that they do not have an internet feature in their mobile phones. Just less than one fourth (23%) of the ex-users claimed that they could not afford the internet expenses.

Table 8.10: Level of expertise in English language (ex-users vs non-users)



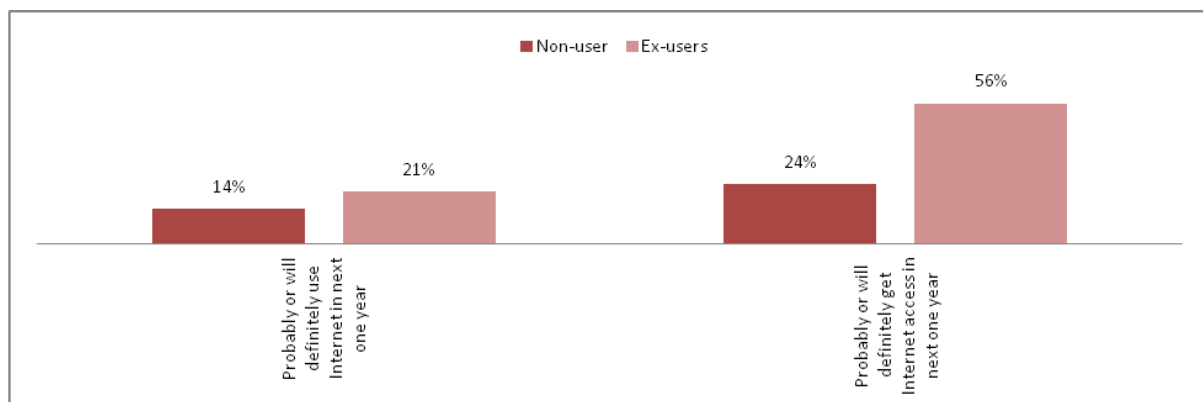
More than half (54%) of the ex-users think that their level of English expertise is intermediate, while 40% of the non-users think that they are beginners.

Table 8.11: Reasons for not accessing internet, by level of expertise in English



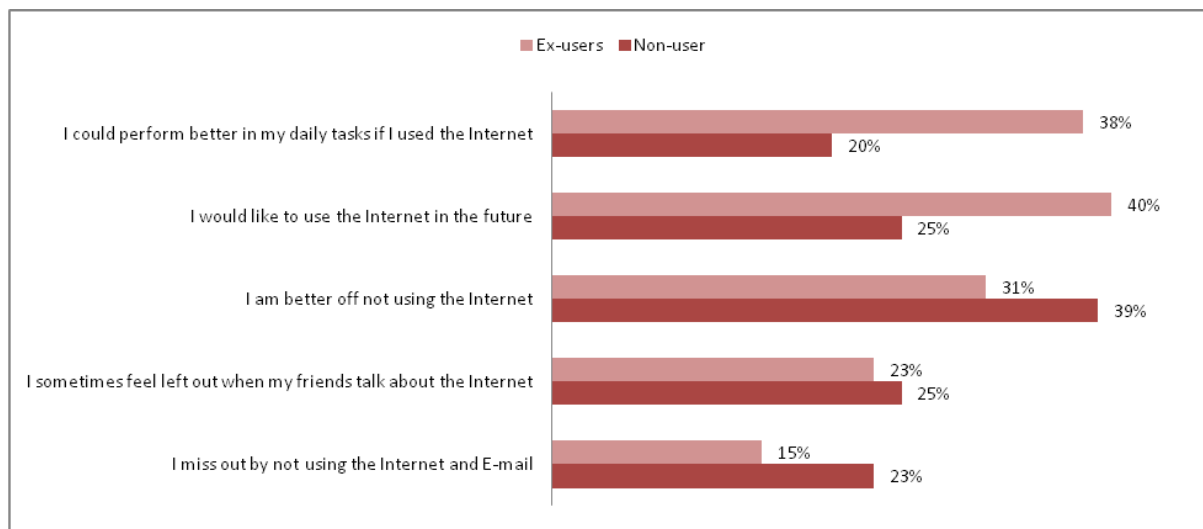
“No interest” is the main reason for not using the internet for all kinds of respondents. Most of the respondents who are expert in English, mentioned that they do not have time (33%) and interest (24%) for the internet. 37% of those who cannot read, write or speak anything in English, mention the reason that “They do not know how to use internet”.

Table 8.12: Likelihood of attaining internet access within the next year – ex-users vs non-users



Only 14% of non-users and 21% of ex-users think that they will probably or definitely use the internet in next year. One fourth (24%) of the non-users and more than half (56%) of ex-users said that their household will probably or definitely get an internet connection in the next year.

Table 8.13: Attitudes towards internet usage – ex-users vs non-users



More than one third (39%) of the non-users and 31% of the ex-users agree or strongly agree with the statement that “I am better off not using the internet”. One fourth (25%) of the non-users and 23% of the ex-users agree or strongly agree with the statement, “I sometimes feel left out when my friends talk about the internet”. While, 40% of the ex-users and 25% of non-users agree or strongly agree with the statement that “I would like to use the internet in future”.

Table 8.14: Most recent usage of internet by ex-users

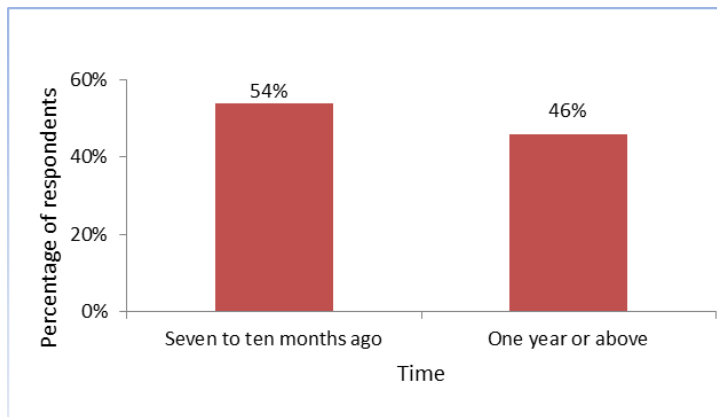
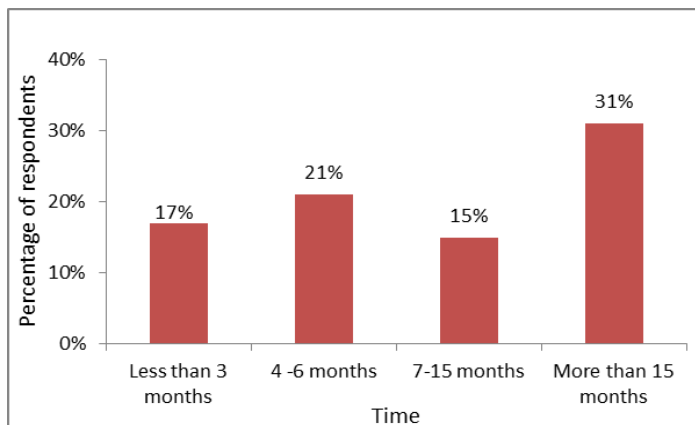
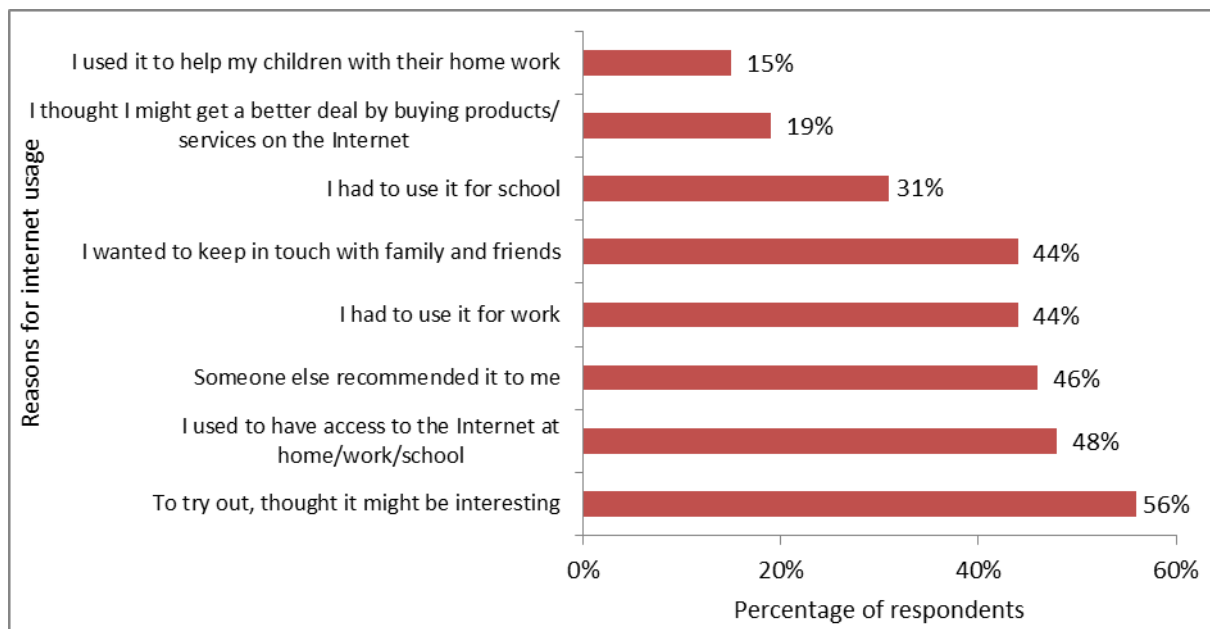


Table 8.15: Duration since last internet access by ex-users



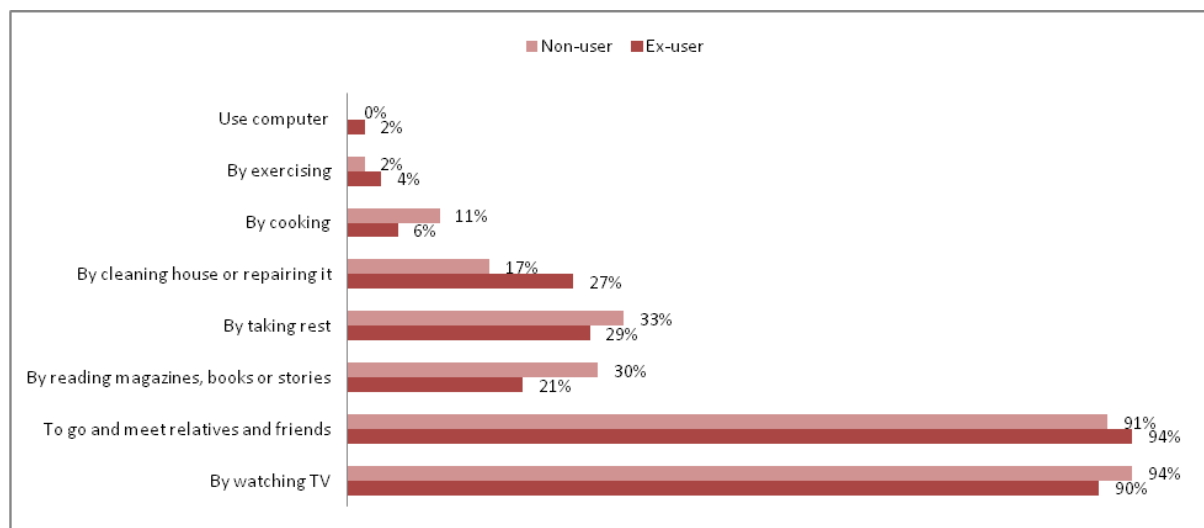
Less than half (46%) of the ex-users had used the internet a year or more ago [Fig 8.14]. 31% of the ex-users did continue to use the internet for more than 15 months, while 17% of the ex-users used the internet only for 3 months or less [Fig 8.15].

Table 8.16: Ex-users' reasons for using the internet

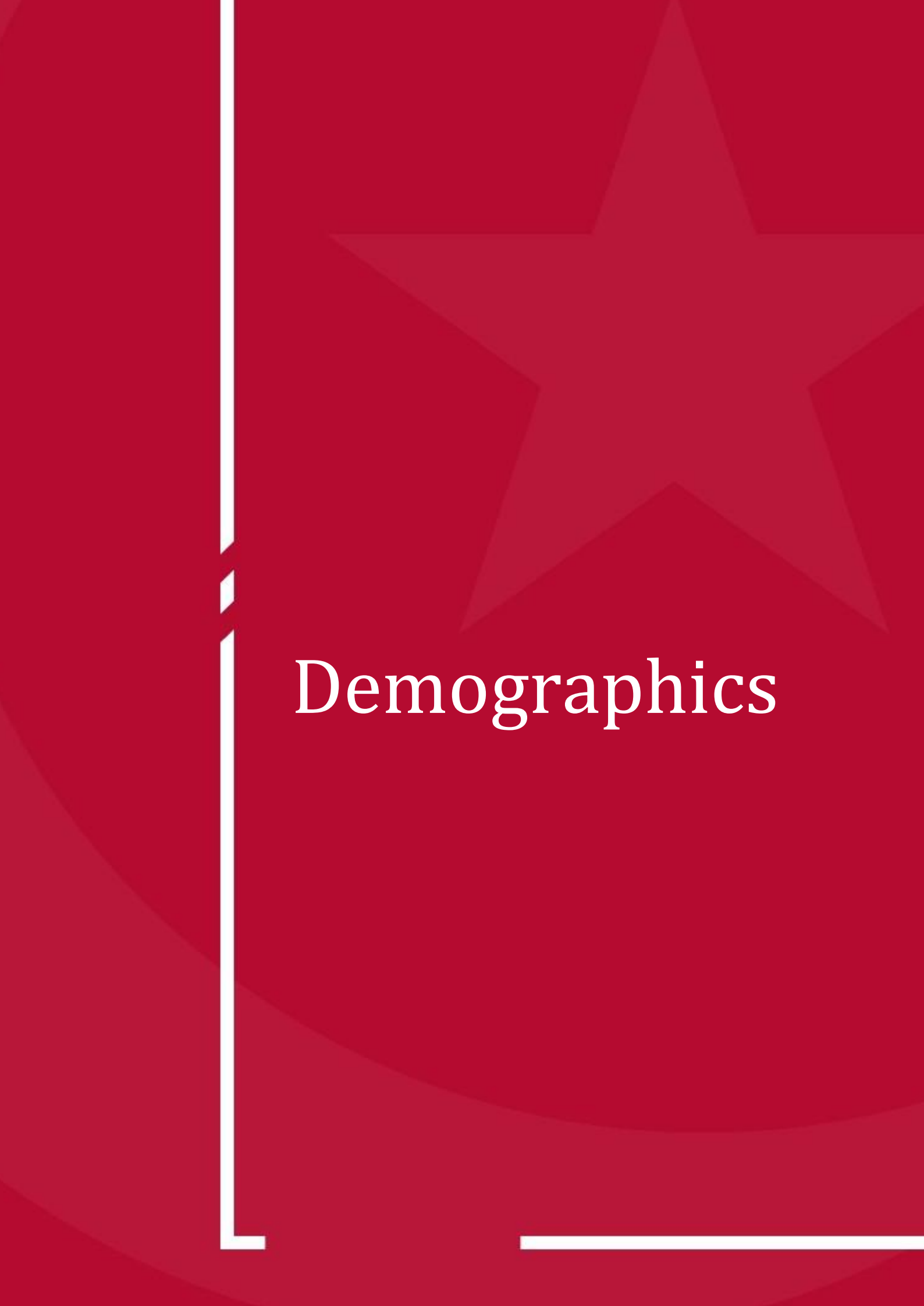


56% of the ex-users gave the reason for using the internet as, “To try out, thought it might be interesting”. Just less than half (48%) of the ex-users gave the reason that “I used to have access to the internet at home/work/school”. While, 46% of the ex-users said that someone else recommended it to me.

Table 8.17: Leisure activities – ex-users vs non-users



Most of the non-users (94%) and ex-users (90%) spend their free time watching TV and meeting relatives and friends (91% of non-users and 94% of ex-users).



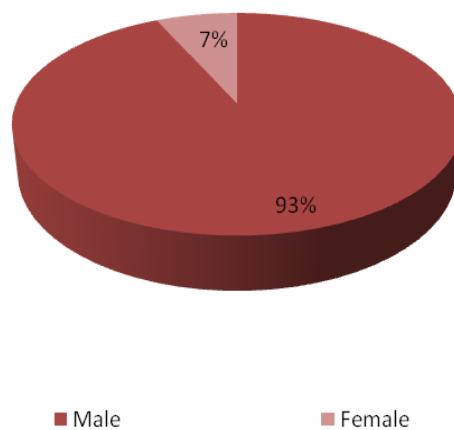
Demographics

DEMOGRAPHICS

Surveys of this nature are not easy to conduct across different parts of the country, given the wide range of ethnic and cultural differences as well as cultural inhibitions. As a result, the demographic diversity accessed in urban areas is much wider than in the rural regions. This is aside from the obvious limitations of travel and dispersion of people in the rural areas as compared with the higher densities in urban Pakistan.

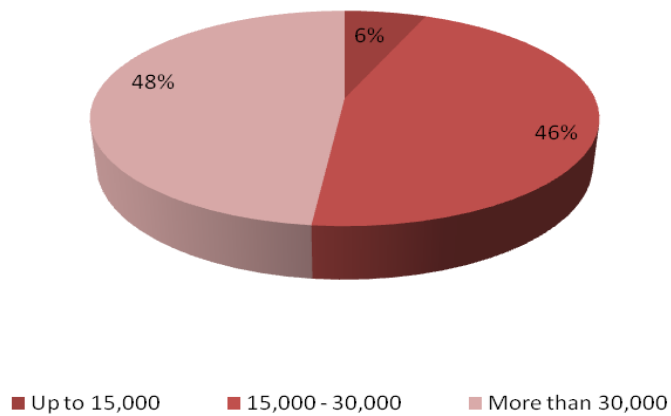
Demographic-Rural

Gender

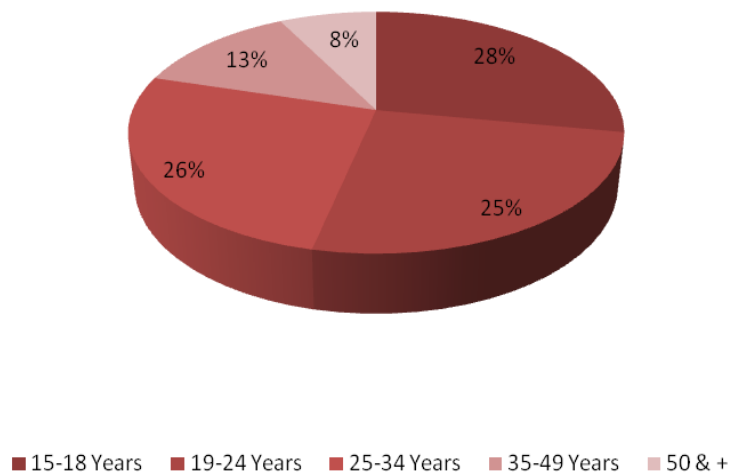


The survey covered 93% males and 7% females in rural Pakistan.

Household Income (in PKR)

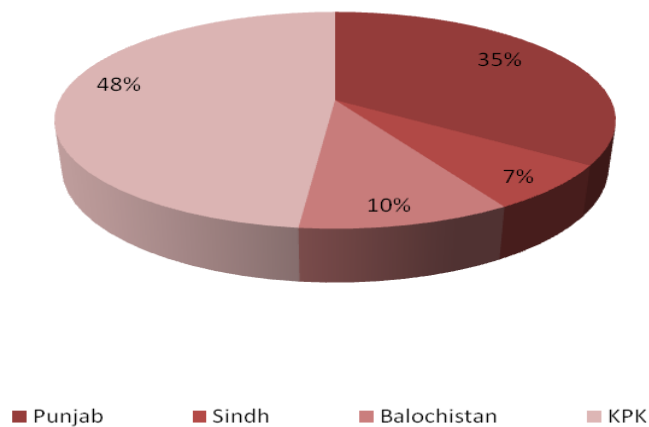


Age Group



15-18 years, with 28%, is the largest age group in the survey, followed by 19-24 years (26%) and 25-34 years (26%). The balance 8% is in the 50+ age group.

Region



The following locations in each province were covered:

Punjab: Rahim Yar Khan, Muzaffar Garh, D G Khan, Gujranwala, Faisalabad, Jhang, Kushab, Sargodha, Attock, Jehlum.

Khyber Pakhtunkhwa: Mardan, Abbotabad, Mansehra, Malakand, D I Khan, Bannu, Kohat

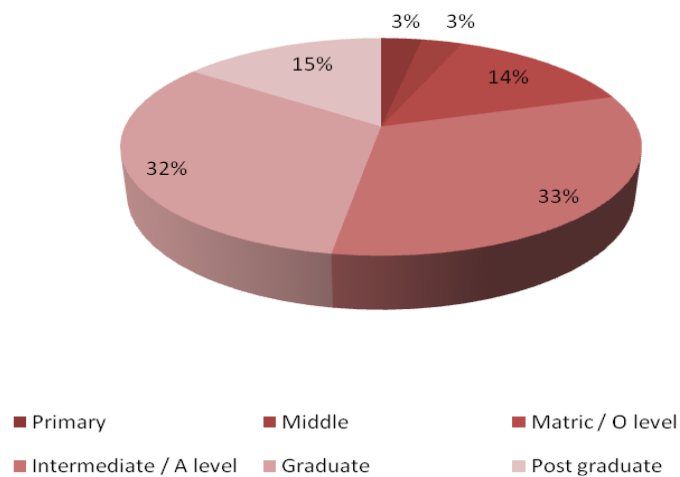
Balochistan: Pashin, Mastung

Sindh: Dadu, Nawabshah, Kherpur

Demographic-Urban

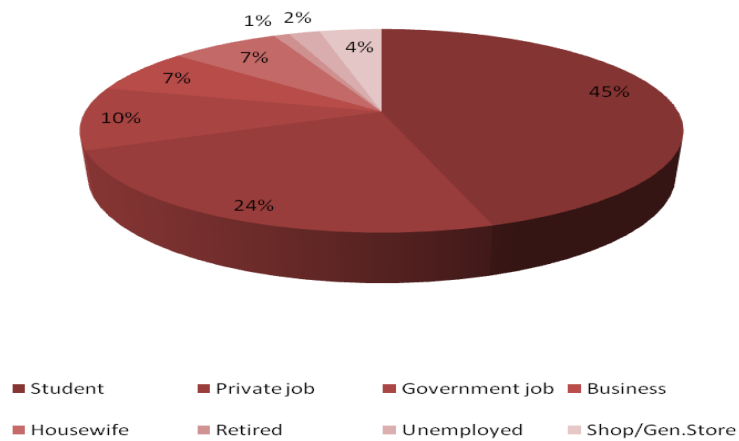
We talked to a range of people in urban areas of the country, selecting from the educated (weighted equally towards secondary and tertiary education, with the rest from lower and higher grades). A quarter of our respondents work in the private sector, with lesser numbers working in government or in business. Nearly half are students.

Respondents' Education



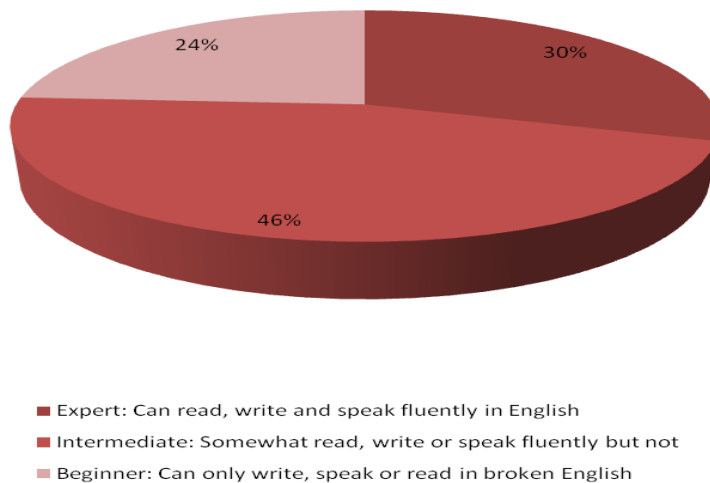
Graduates (32%) and Intermediate/A level (33%) students were the biggest chunk of respondents who participated in this study. A good 15% of the respondents were post graduates also.

Respondents' Occupation



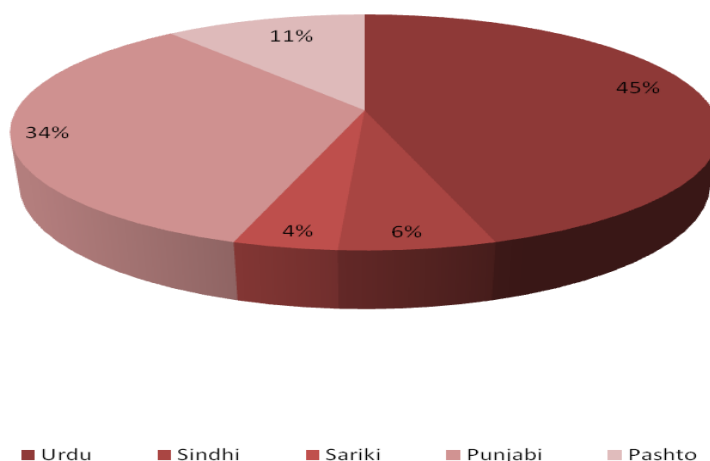
The study was conducted by covering respondents from various professional fields ranging from academia to government jobs, from businesses to general stores, from housewives to students, unemployed and retired participants, thus forming a representative sample of the population.

Respondents' level of Expertise in English



The study also looked at the respondents' expertise in the English language to understand their internet consumption habits.

Respondents' Language spoken at home



The respondents spoke a mix of languages ranging from the national language – Urdu to various regional languages such as Sindhi, Saraiki, Punjabi and Pashto.

