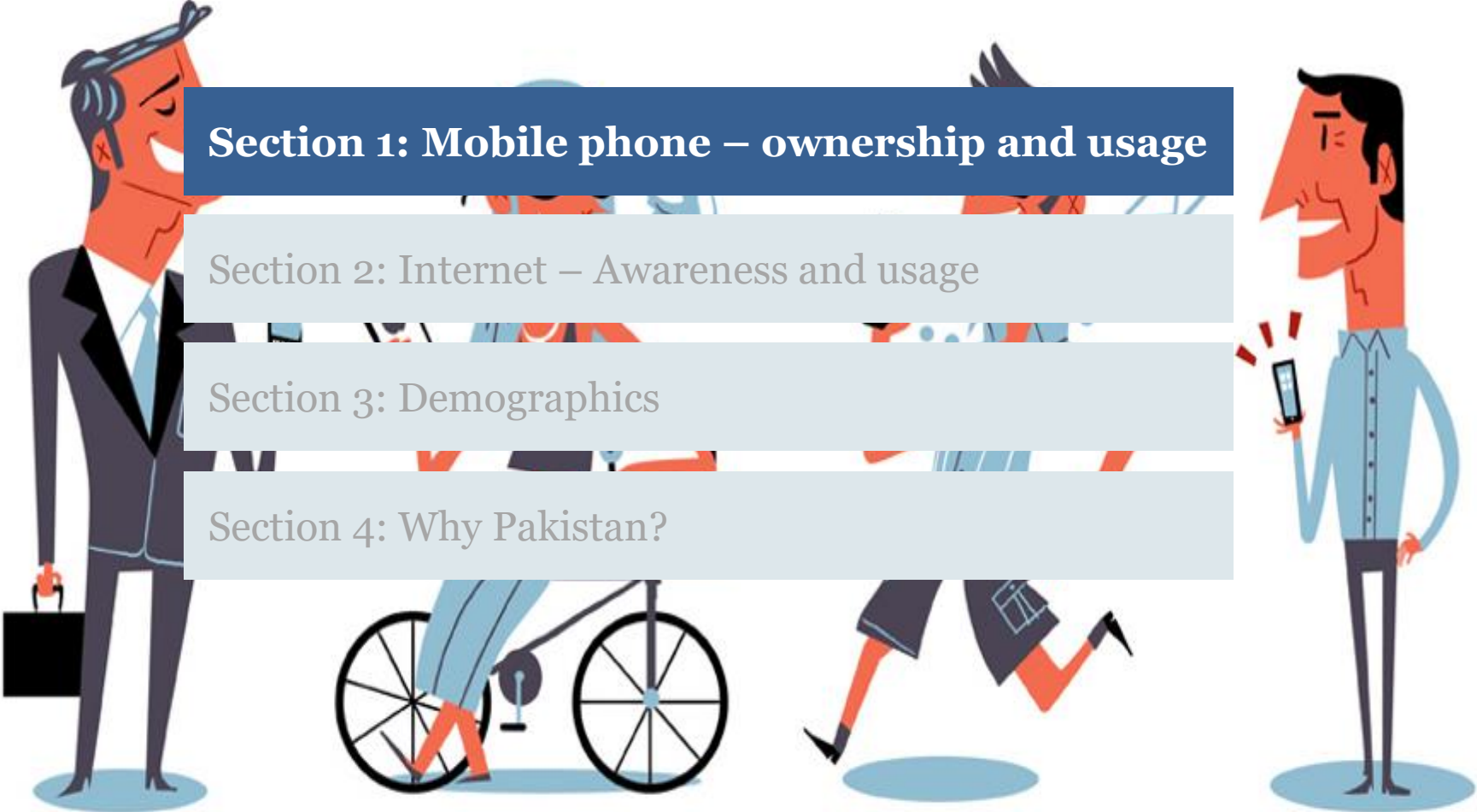


ICT landscape in Pakistan 2019

A Guide for Techpreneurs



Section 1: Mobile phone – ownership and usage

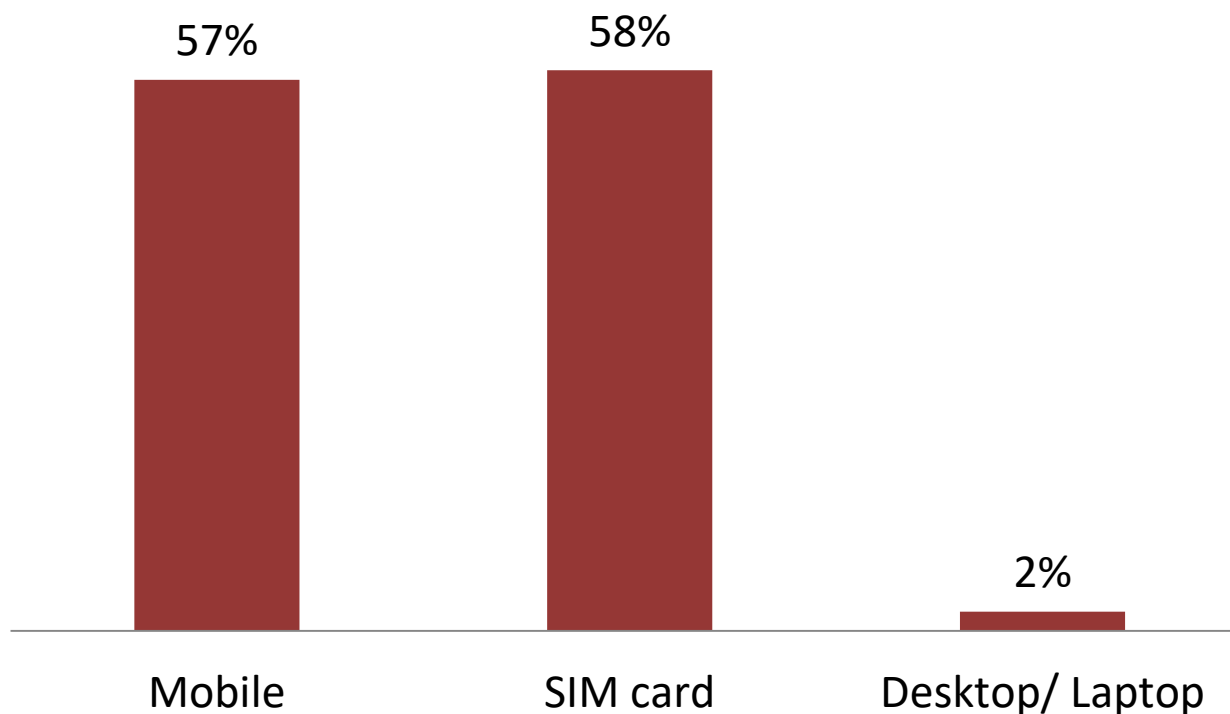
Section 2: Internet – Awareness and usage

Section 3: Demographics

Section 4: Why Pakistan?

57% of Pakistanis aged 15-65 have a mobile phone of some type. Negligible computer ownership

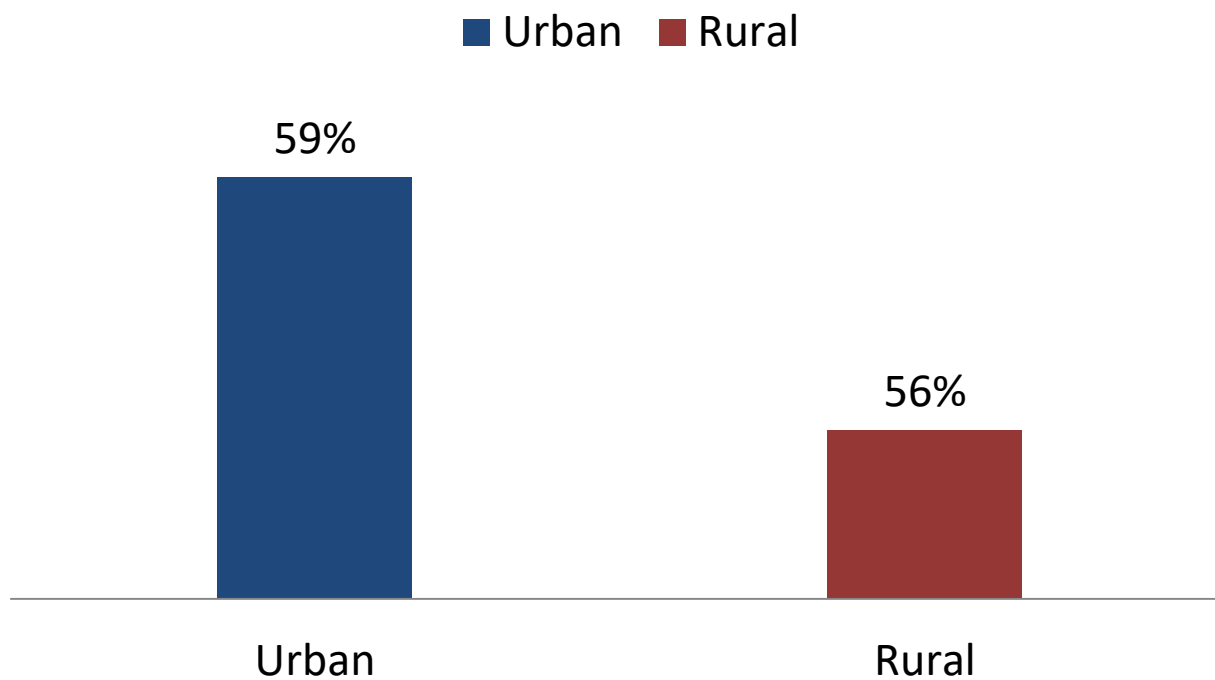
Mobile phone, SIM card & desktop or laptop ownership (% of aged 15-65 population)



Source: After Access, ICT access and use in Pakistan and the Global South 2018

Slightly lower ownership among rural Pakistanis

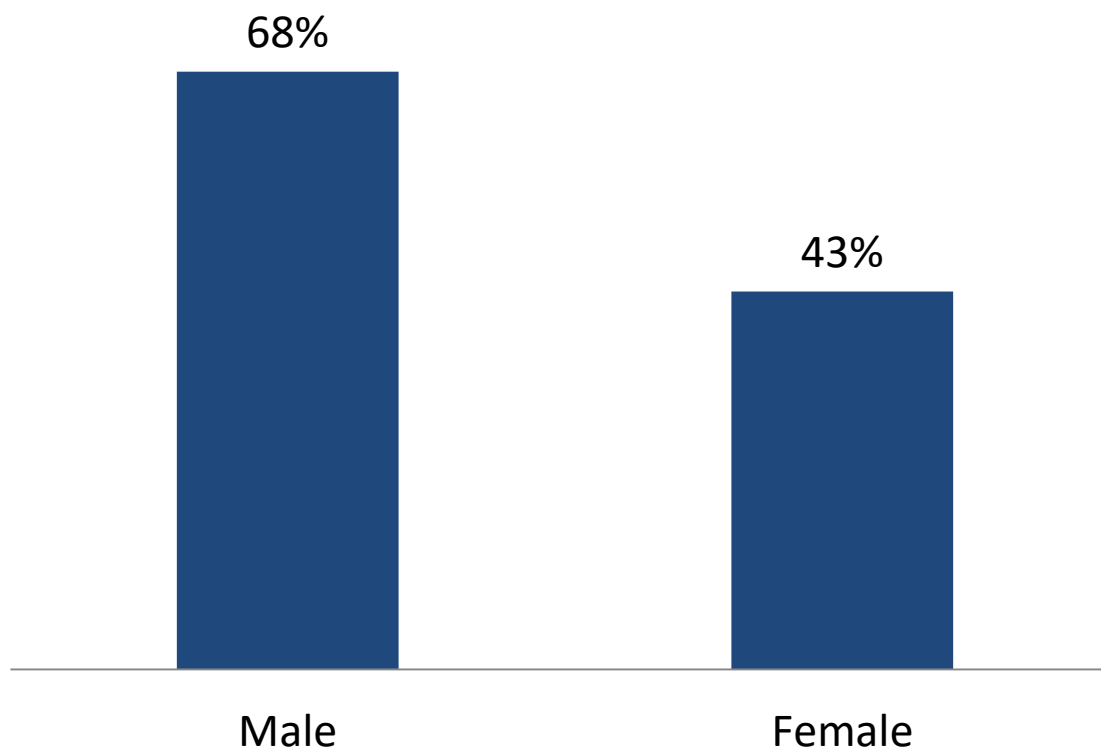
Mobile phone ownership (% of aged 15-65 population)



Source: After Access, ICT access and use in Pakistan and the Global South 2018

Significant gender gap in Pakistan

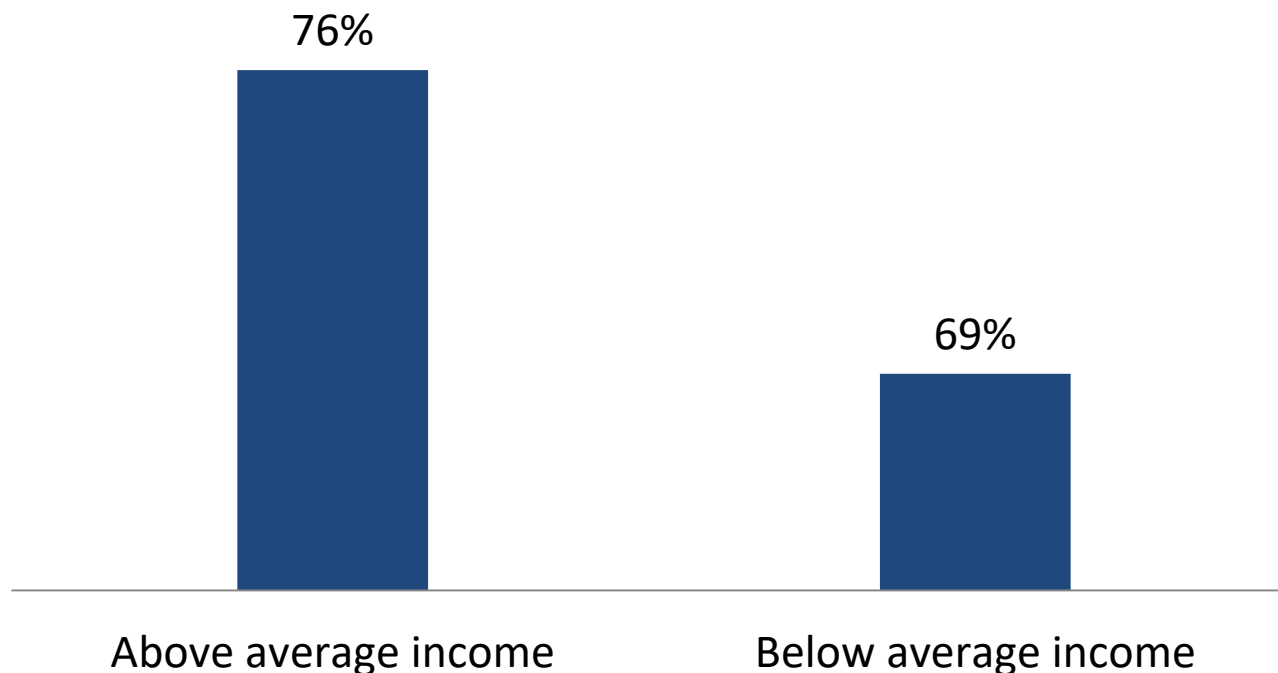
Mobile phone ownership (% of aged 15-65 population)



Source: After Access, ICT access and use in Pakistan and the Global South 2018

Low gap in phone ownership between high and low income earners in Pakistan

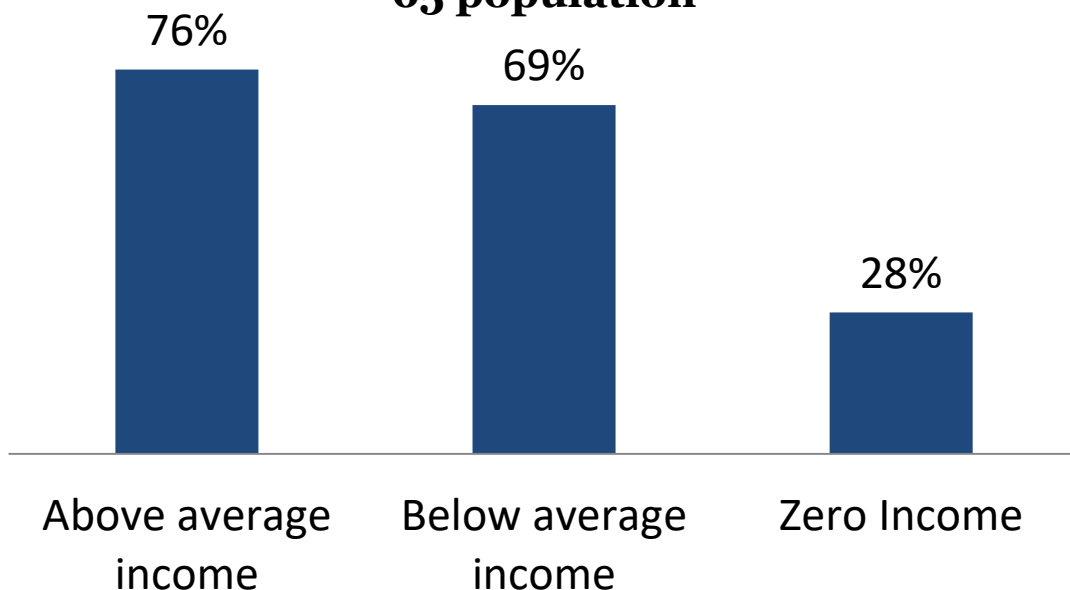
Mobile phone ownership (% of aged 15-65 population)



Source: After Access, ICT access and use in Pakistan and the Global South 2018

In Pakistan more than 25% of the zero income earners own a mobile phone

Mobile phone ownership (% of aged 15-65 population)

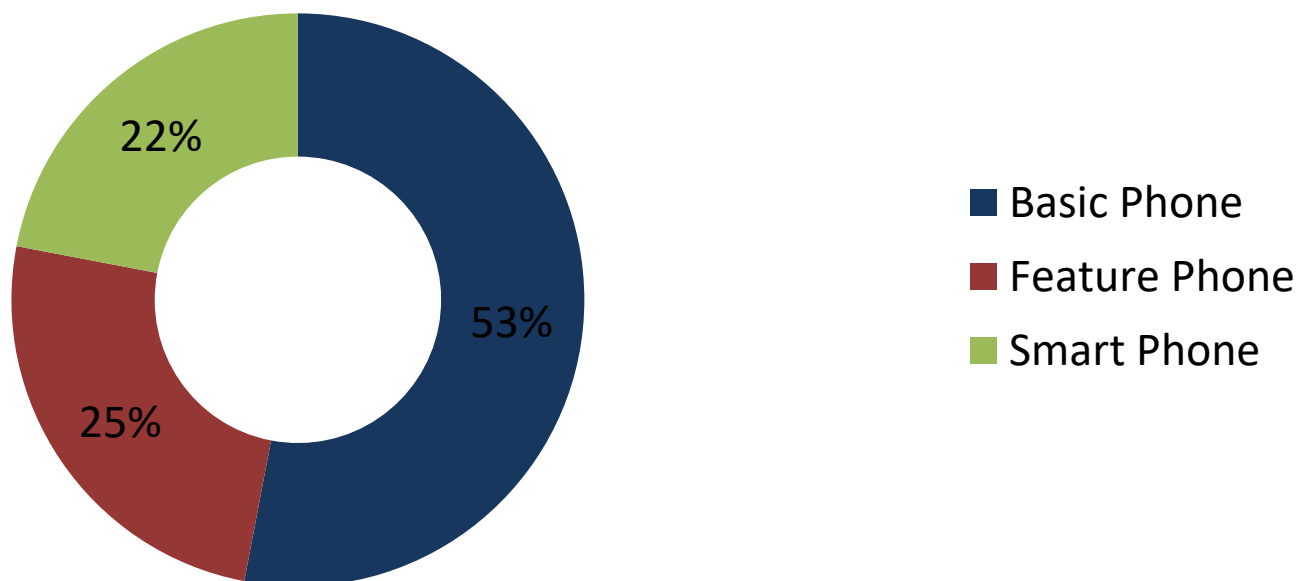


Who are the zero-income earners (among mobile phone owners)?

- 58% live in urban areas
- 57% are women
- 82% have less than primary or no education
- 36% are 15-25 years old

Only 22% of phone owners use a smart phone as the primary device; 53% still have basic phones (that are not internet enabled)

Mobile phone ownership (% of aged 15-65 mobile phone owners)

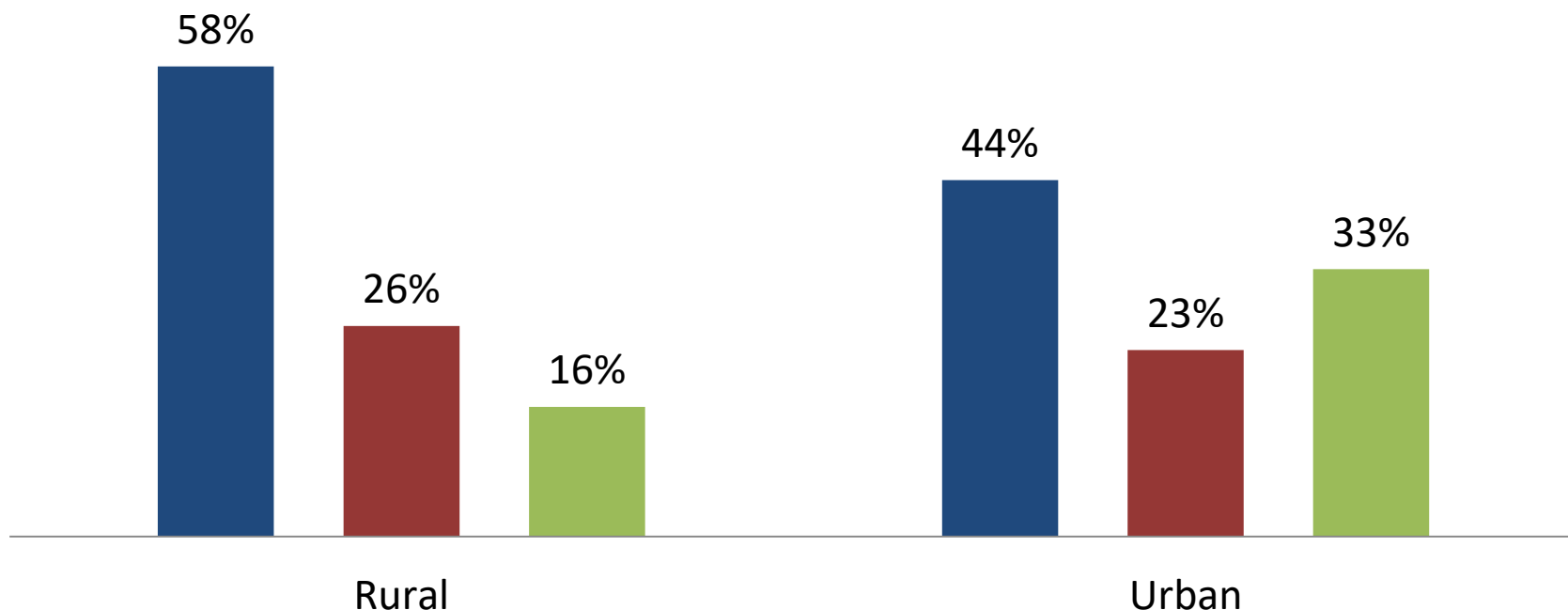


Source: After Access, ICT access and use in Pakistan and the Global South 2018

Smartphones not caught on in rural yet

Mobile phone ownership (% of aged 15-65 mobile phone owners)

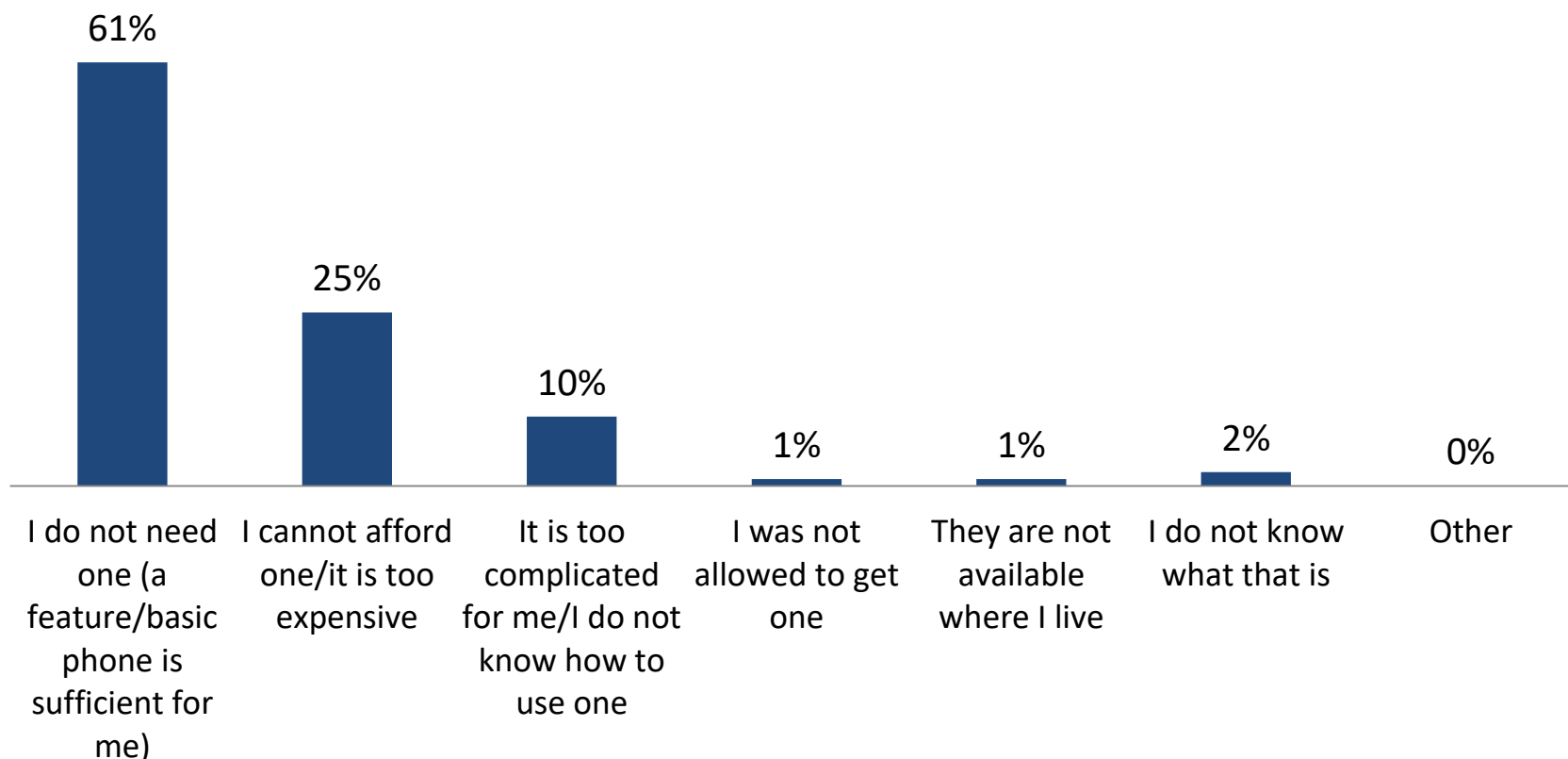
■ Basic Phone ■ Feature Phone ■ Smartphone



Source: After Access, ICT access and use in Pakistan and the Global South 2018

Lack of need is main reason for not owning a smartphone (61%)

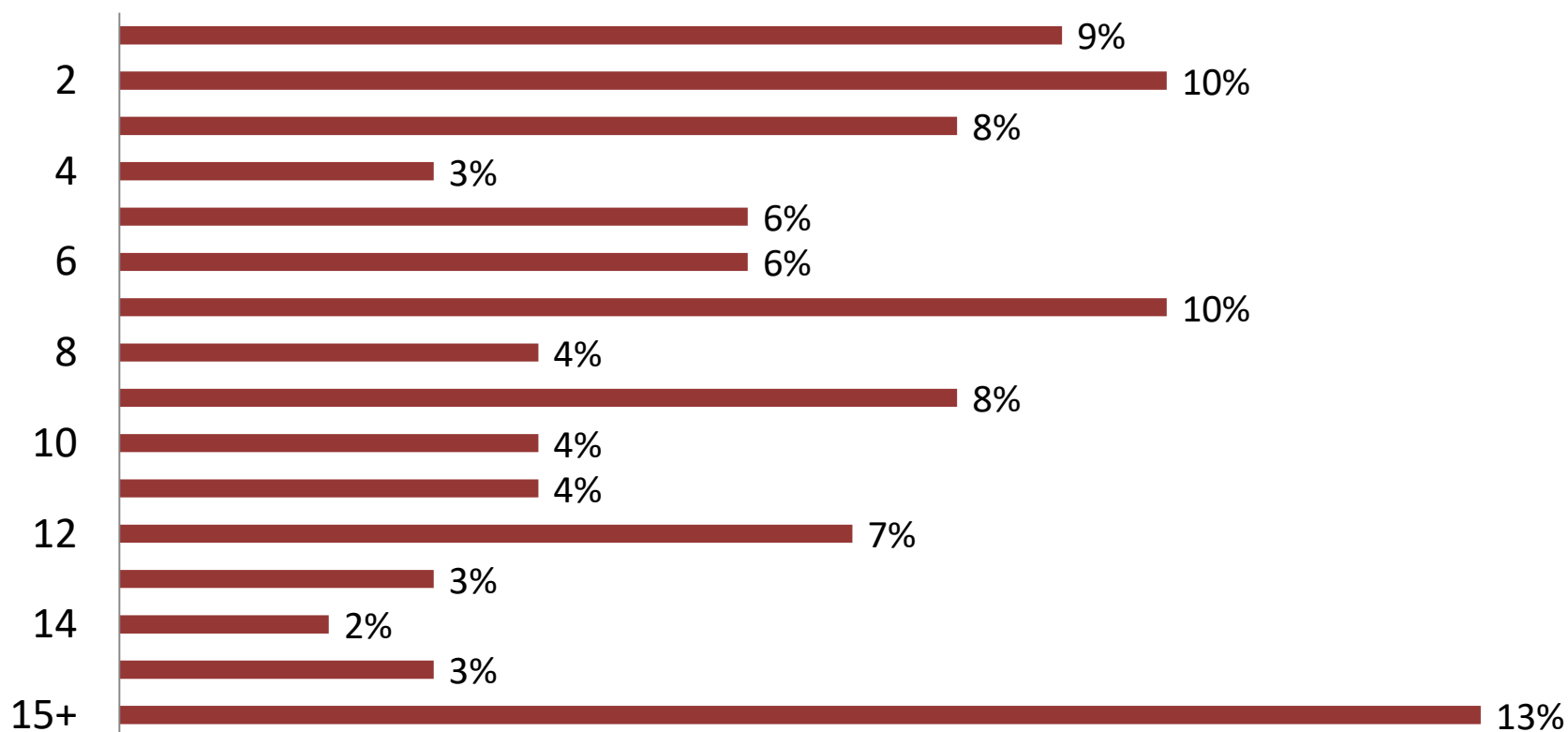
Reason for not owning a smartphone (% of aged 15-65 basic or feature phone owners)



Source: After Access, ICT access and use in Pakistan and the Global South 2018

27% of got connected to mobile networks in last 3 years; 51% in the last 5 years

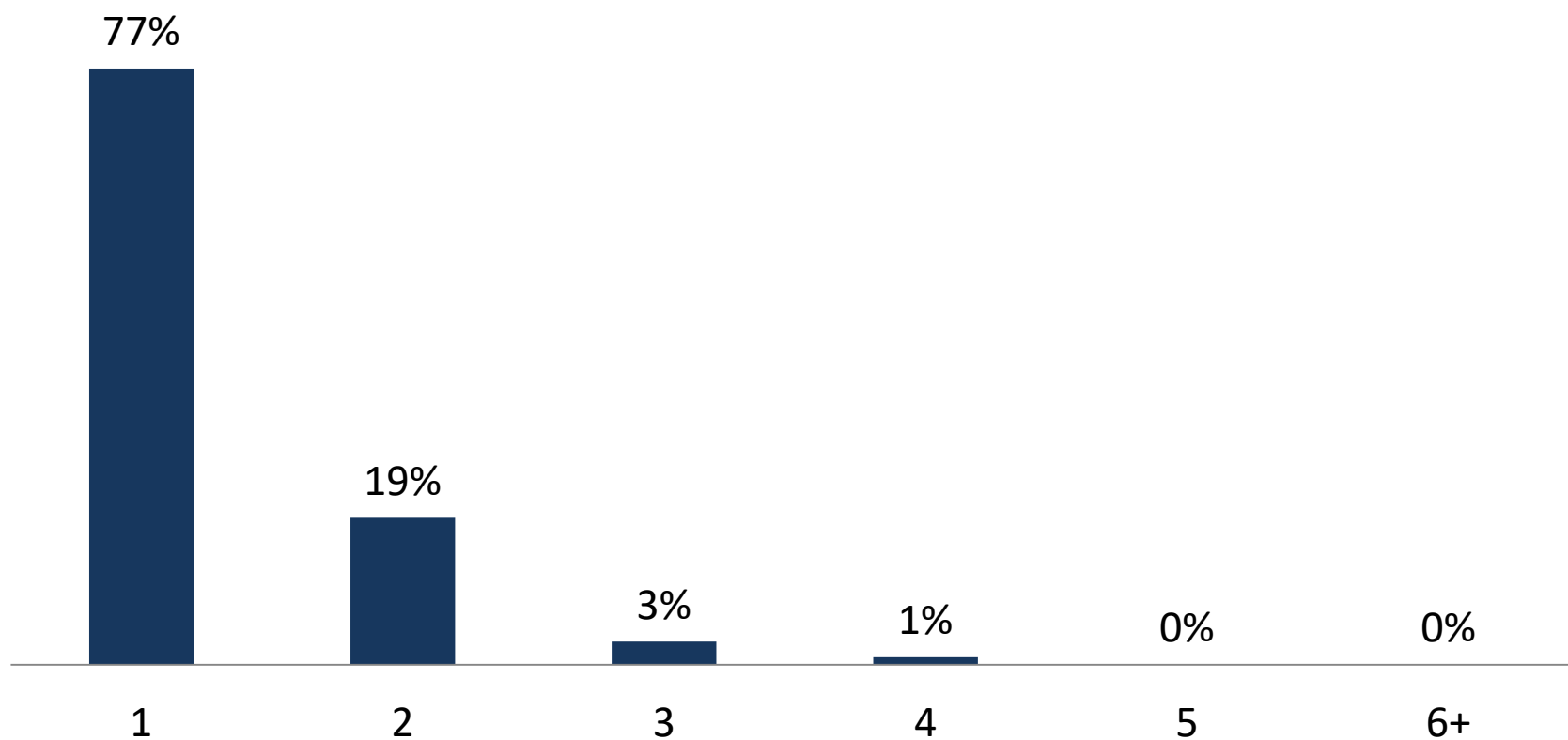
Number of years since first ever mobile connection (% of aged 15-65 mobile phone owners)



Source: After Access, ICT access and use in Pakistan and the Global South 2018

22% of Pakistanis aged 15-65 mobile owners have more than 1 SIM

Number of SIM cards (% of aged 15-65 mobile phone owners)



Source: After Access, ICT access and use in Pakistan and the Global South 2018

Section 1: Mobile phone – ownership and usage

Section 2: Internet – Awareness and usage

Section 3: Demographics

Section 4: Why Pakistan?

Only 37% of Pakistanis 15-65 know of/have heard of the Internet

Internet awareness and use (% of aged 15-65 population)

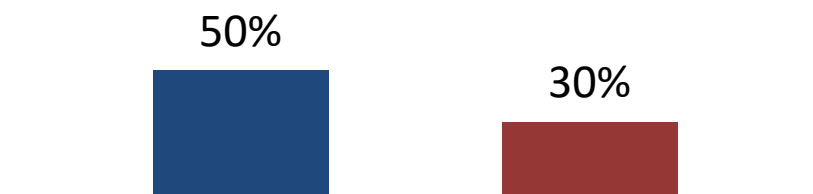


Source: After Access, ICT access and use in Pakistan and the Global South 2018

Awareness low among rural, female, less educated, lower income, basic phone owners and among older people

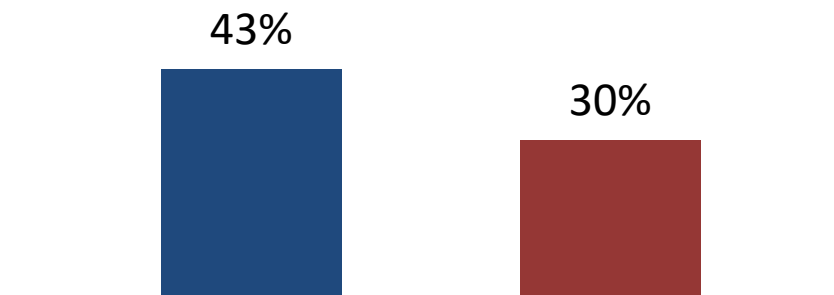
Urban Rural

■ Urban ■ Rural



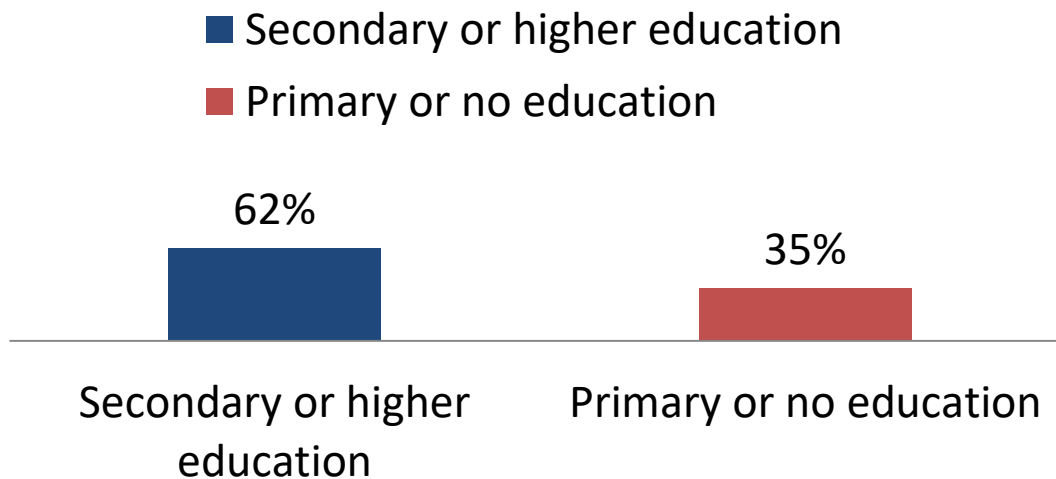
Gender

■ Male ■ Female

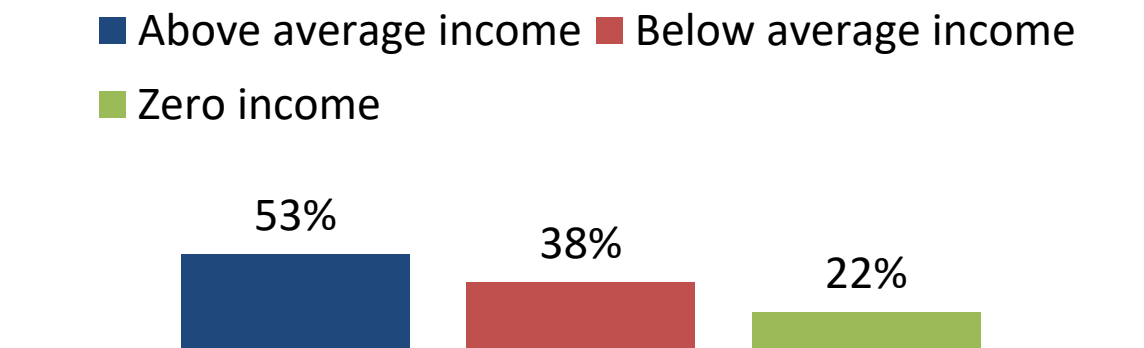


Source: After Access, ICT access and use in Pakistan and the Global South 2018

Education

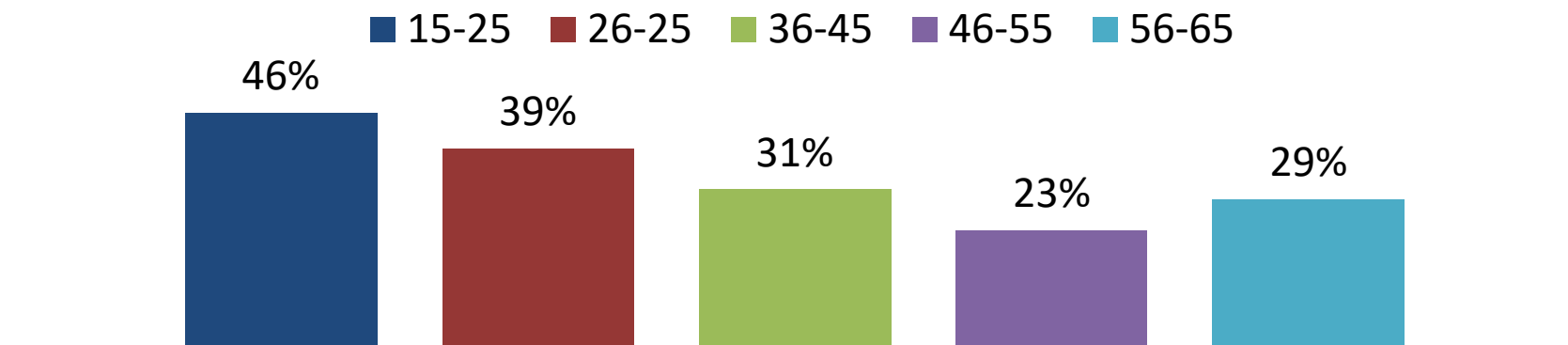


Income

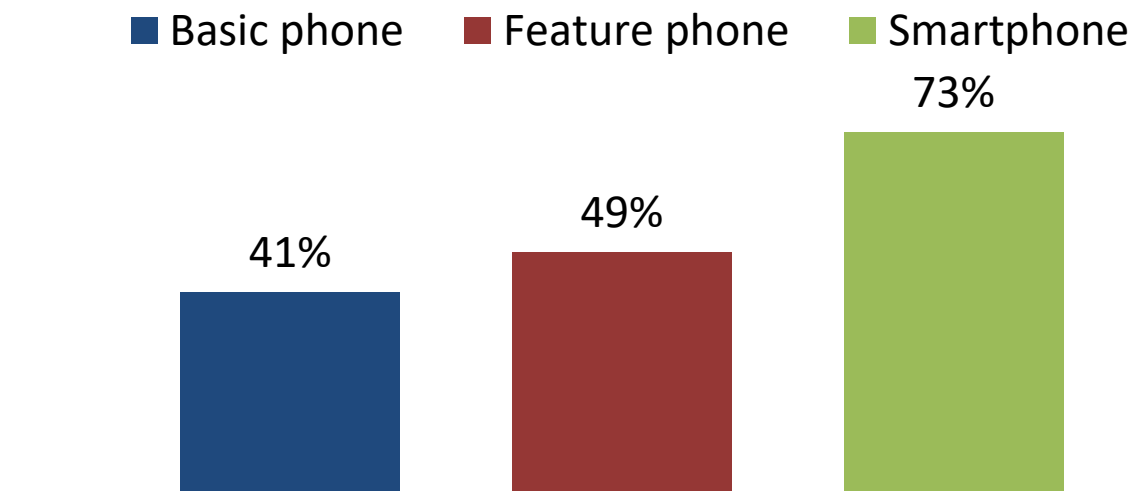


Source: After Access, ICT access and use in Pakistan and the Global South 2018

Age



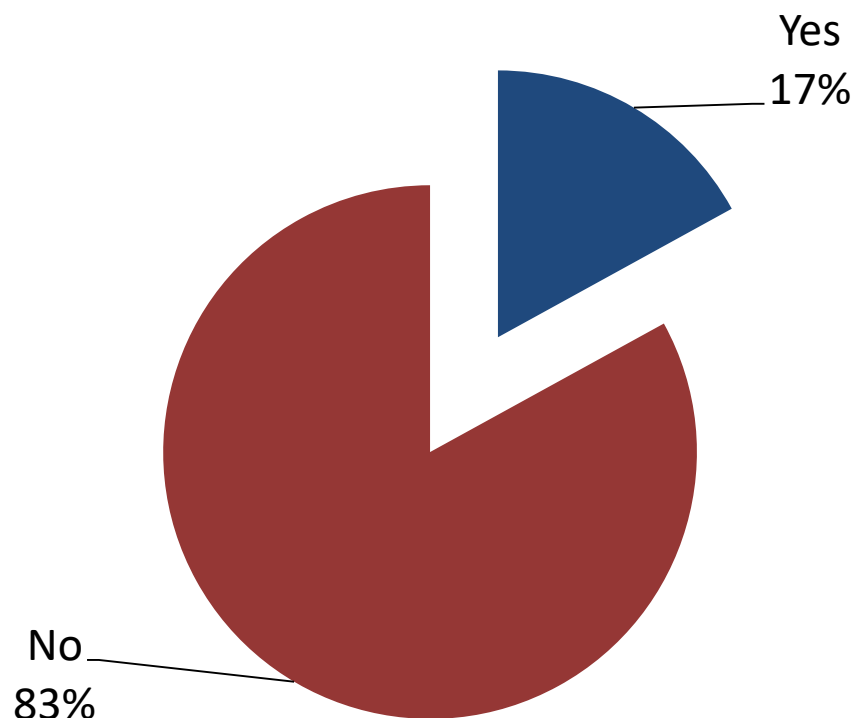
Phone type



Source: After Access, ICT access and use in Pakistan and the Global South 2018

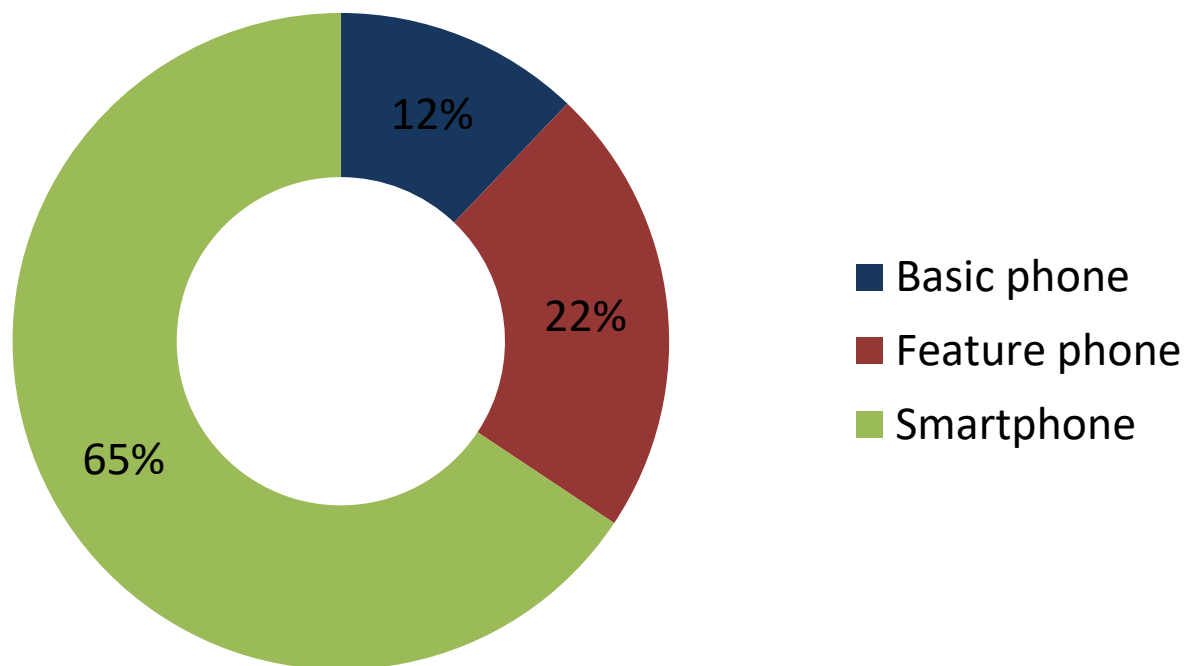
Internet Usage

Have you ever used the Internet (Gmail, Google, Facebook, email)?



Source: After Access, ICT access and use in Pakistan and the Global South 2018

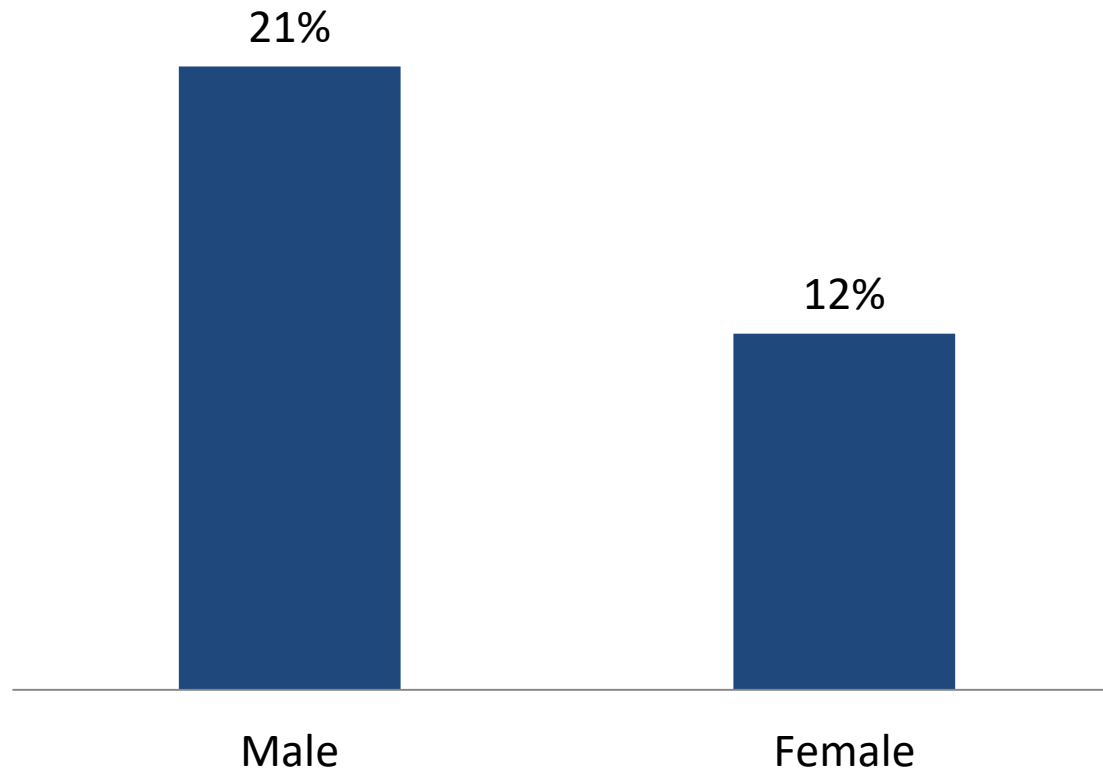
Smartphone owners are the highest users of the Internet



Source: After Access, ICT access and use in Pakistan and the Global South 2018

High gender divide in Internet use in Pakistan

Internet use (% of aged 15-65 population)

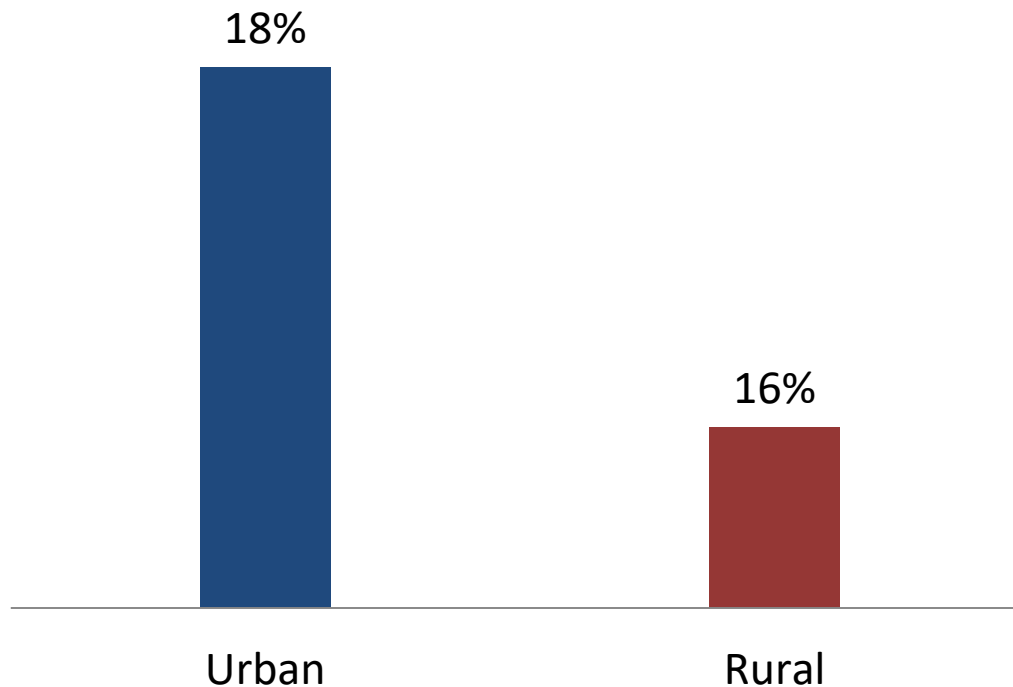


Source: After Access, ICT access and use in Pakistan and the Global South 2018

Rural dwellers less likely to be online compared to urban

Internet use (% of aged 15-65 population)

■ Urban ■ Rural



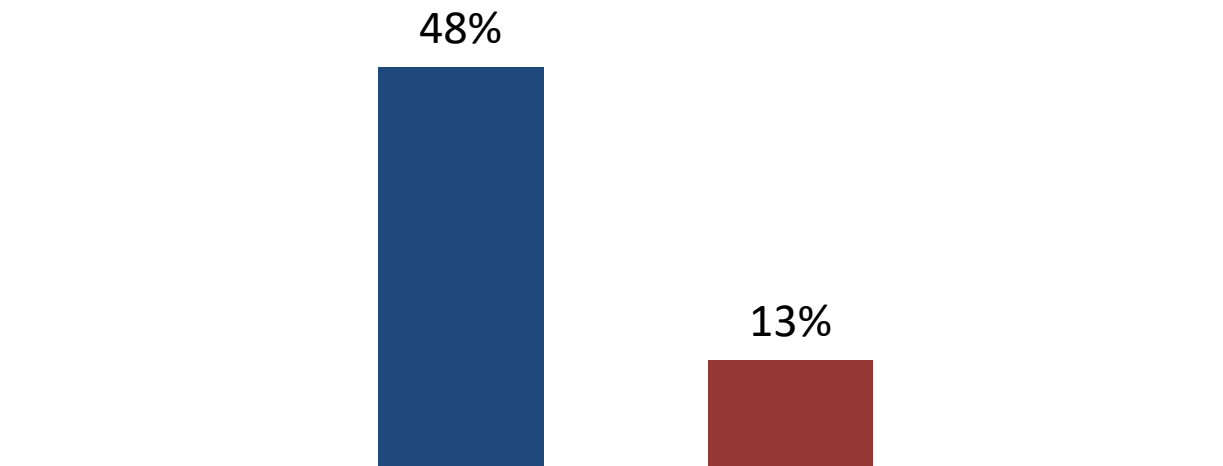
Lowest level of Internet use among the rural women

Source: After Access, ICT access and use in Pakistan and the Global South 2018

Significant difference in Internet use between high educated among less educated in Pakistan

Internet use (% of aged 15-65 population)

■ Secondary or higher education ■ Primary or no education

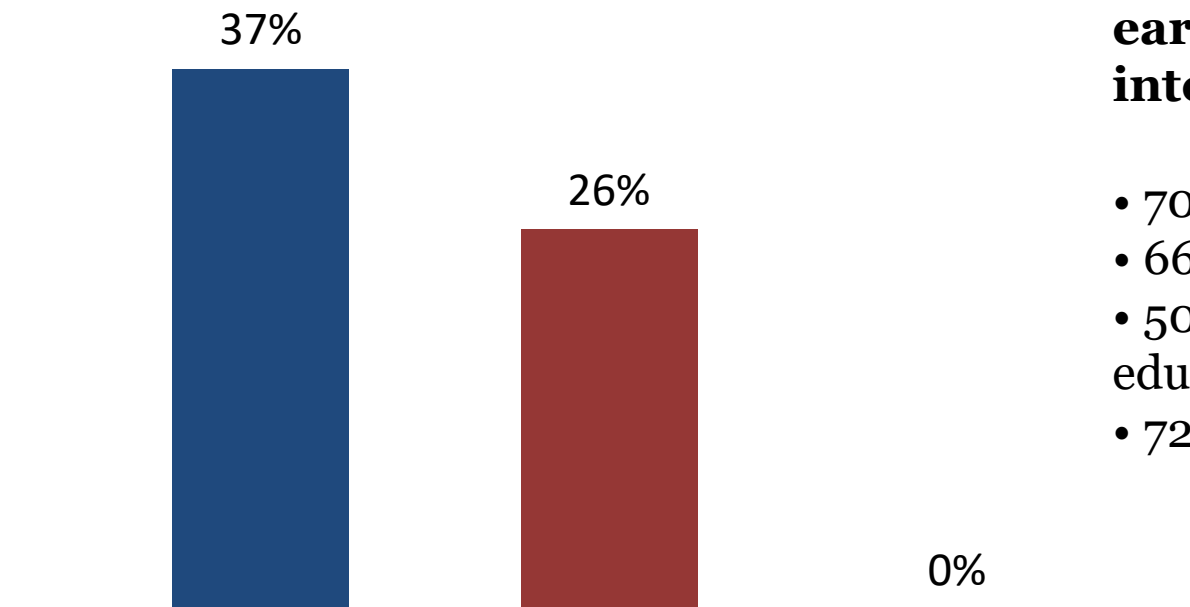


Source: After Access, ICT access and use in Pakistan and the Global South 2018

In Pakistan, high income earners use the Internet most

Internet use (% of aged 15-65 population)

■ Above average income ■ Below average income
■ Zero income



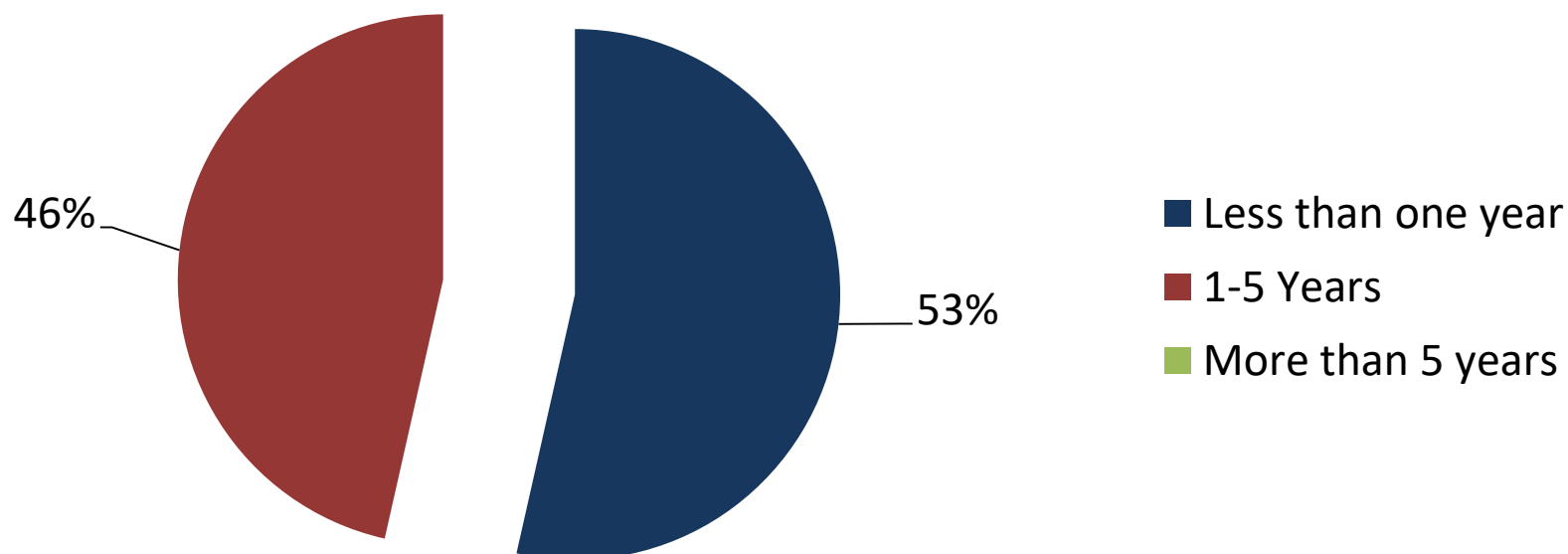
Who are the zero-income earners (among internet users)?

- 70% live in urban areas
- 66% are female
- 50% have secondary or higher education
- 72% are 15-25 years old

Source: After Access, ICT access and use in Pakistan and the Global South 2018

53% of Internet users in Pakistan, came online less than a year before survey

Number of years since first Internet use (% of aged 15-65 Internet users)



Source: After Access, ICT access and use in Pakistan and the Global South 2018

Less than half Pakistanis are mobile app users

App use (% of aged 15-65 feature or smartphone owners)



Source: After Access, ICT access and use in Pakistan and the Global South 2018

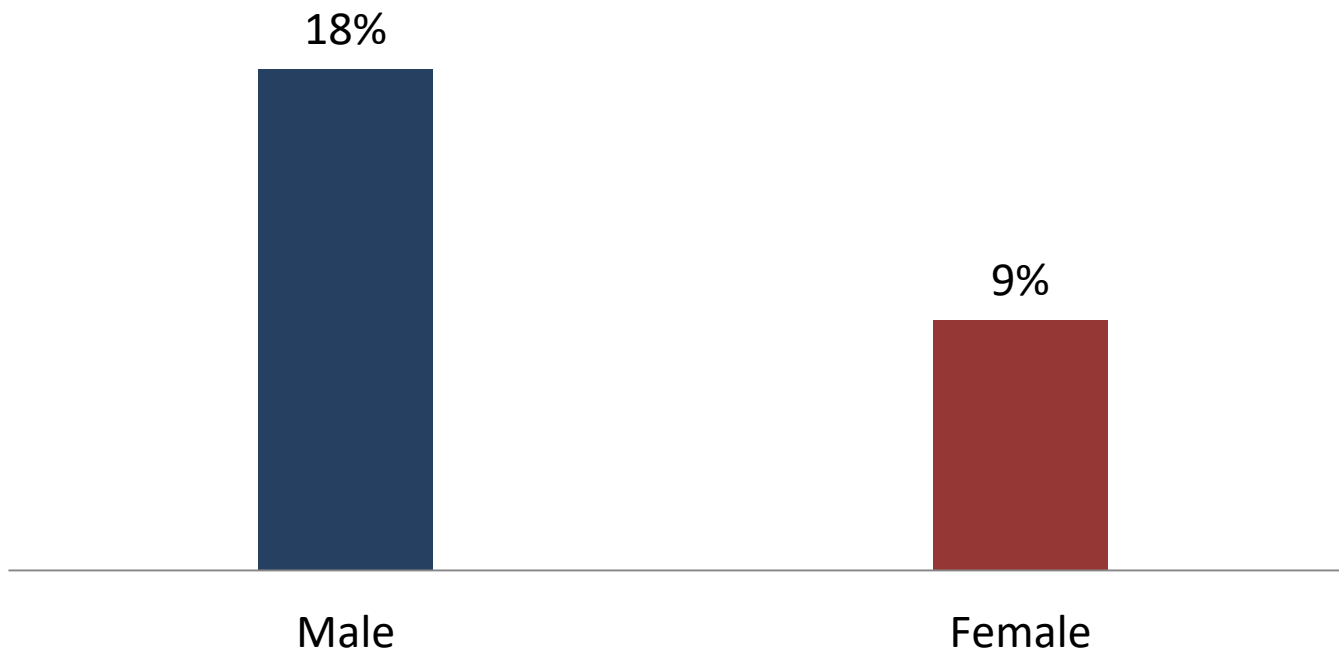
App use (% of aged 15-65 feature or smartphone owners); Are you using these types of mobile apps on your phone?

Social networking apps	25%
Messaging or chat(text) apps	25%
Voice apps	24%
Transport apps	17%
Search tool apps	16%
Game apps	15%
Business apps	14%
Entertainment apps	13%
News apps	12%
Trading or e-commerce apps	12%
Weather apps	11%
Educational applications	10%
Payment gateway apps	7%

High gender gap in social media use in Pakistan

Social media use (% of aged 15-65 population)

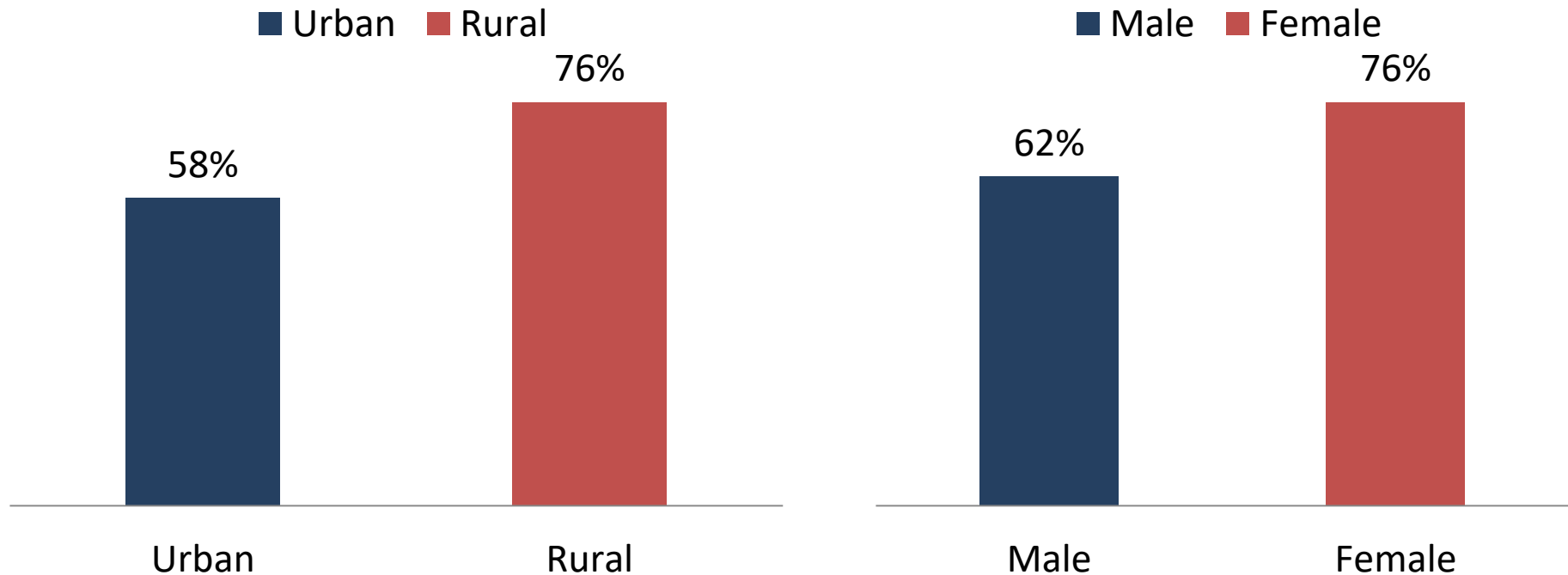
■ Male ■ Female



Source: After Access, ICT access and use in Pakistan and the Global South 2018

More rural, women, the less educated and the old people don't know what the internet is

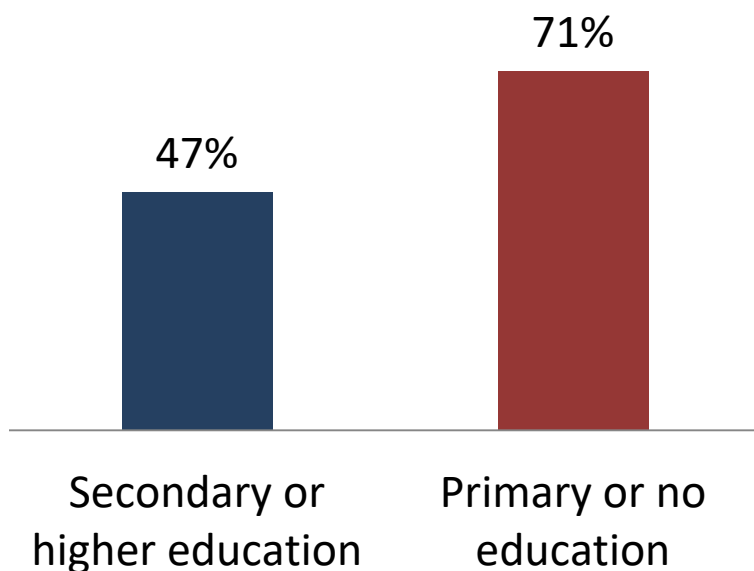
Main reasons for not using the Internet (% of non-Internet users aged 15-65) - I don't know what internet is



Main reasons for not using the Internet (% of non-Internet users aged 15-65) - I don't know what internet is

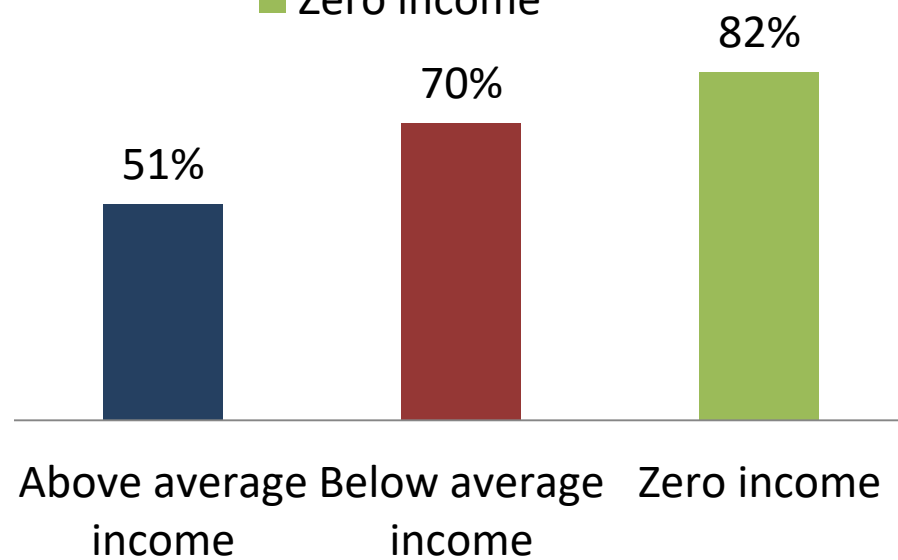
Education

- Secondary or higher education
- Primary or no education

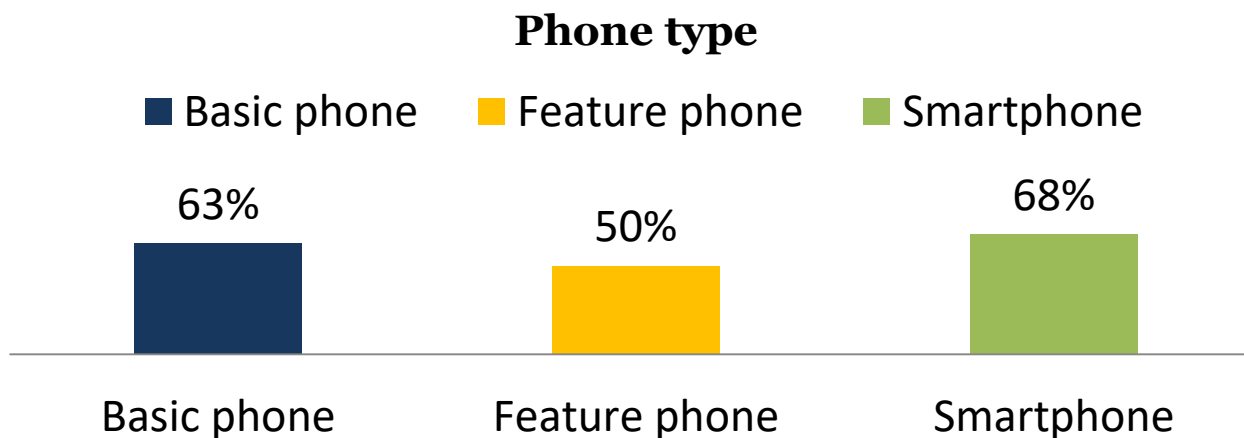
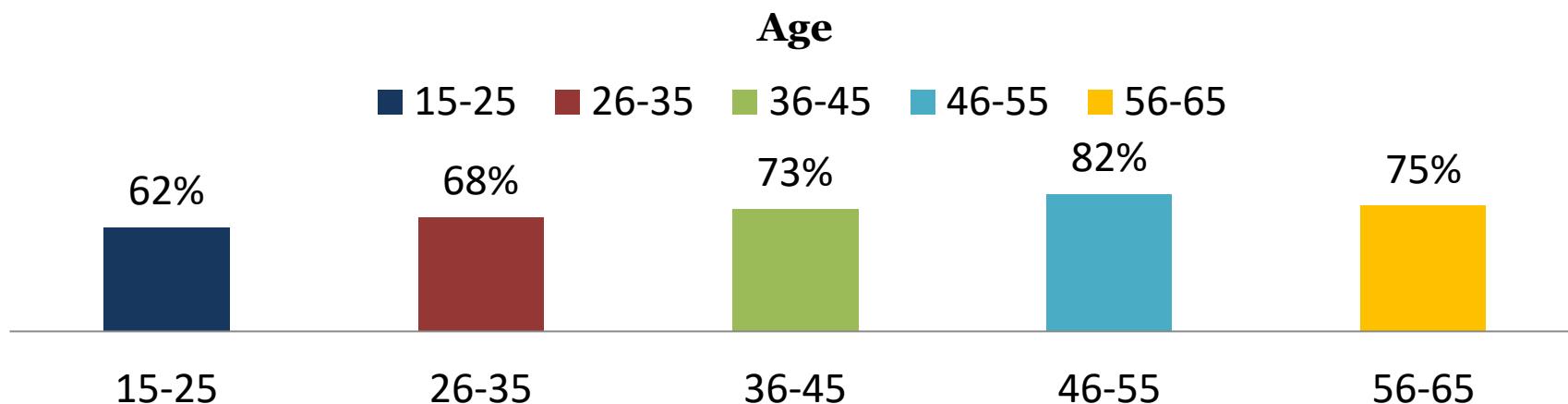


Income

- Above average income
- Below average income
- Zero income



Main reasons for not using the Internet (% of non-Internet users aged 15-65) - I don't know what internet is





Section 1: Mobile phone – ownership and usage

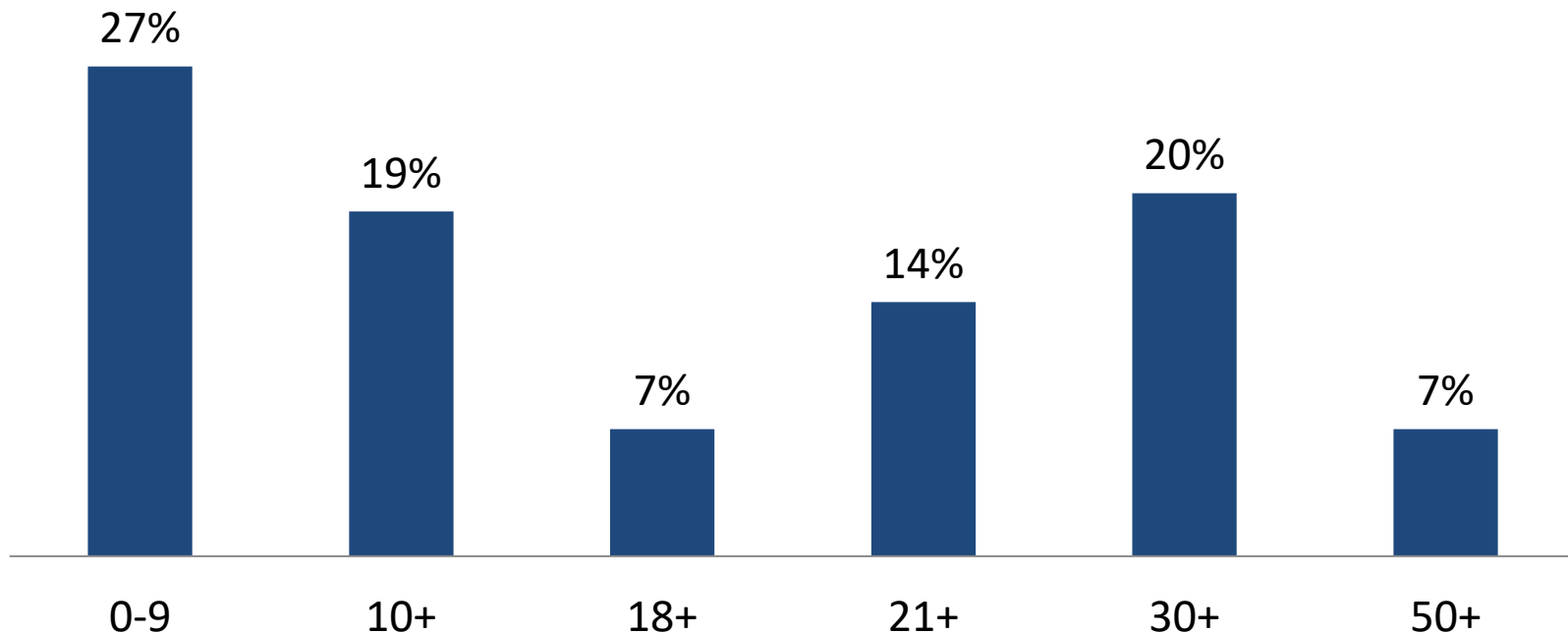
Section 2: Internet – Awareness and usage

Section 3: Demographics

Section 4: Why Pakistan?

Large percentage of working age population

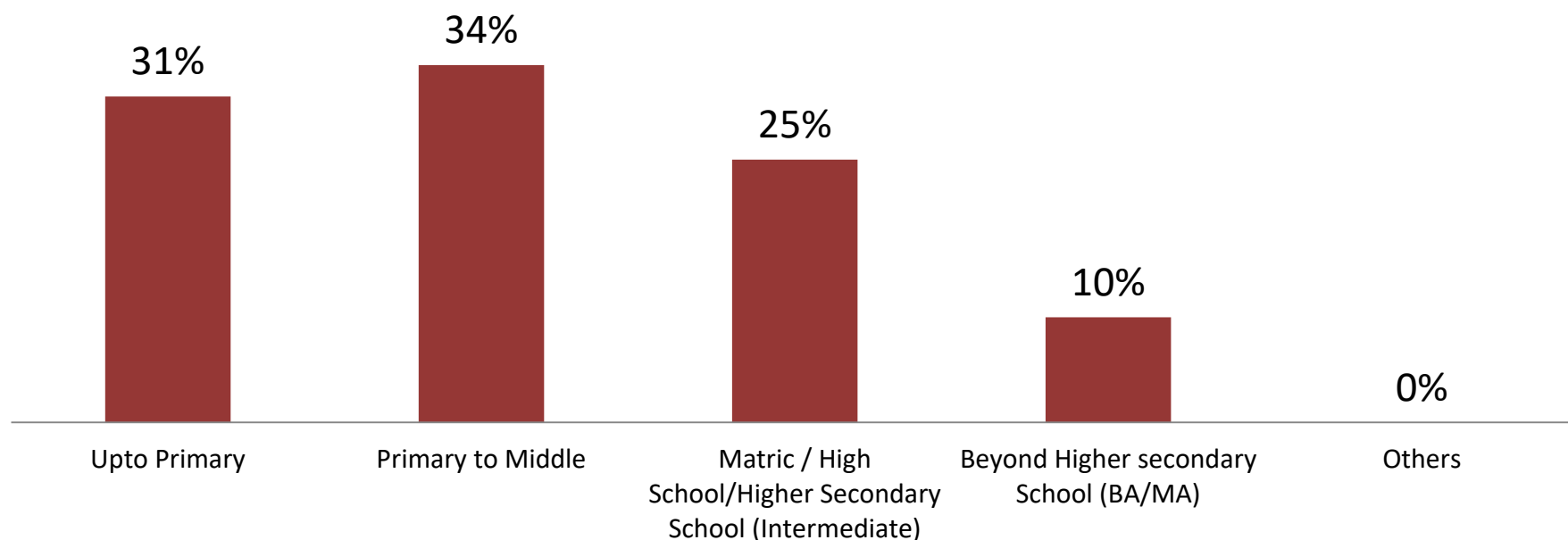
Age-Distribution of Population of Pakistan



Gallup Source Book on Pakistani Consumer, 2018

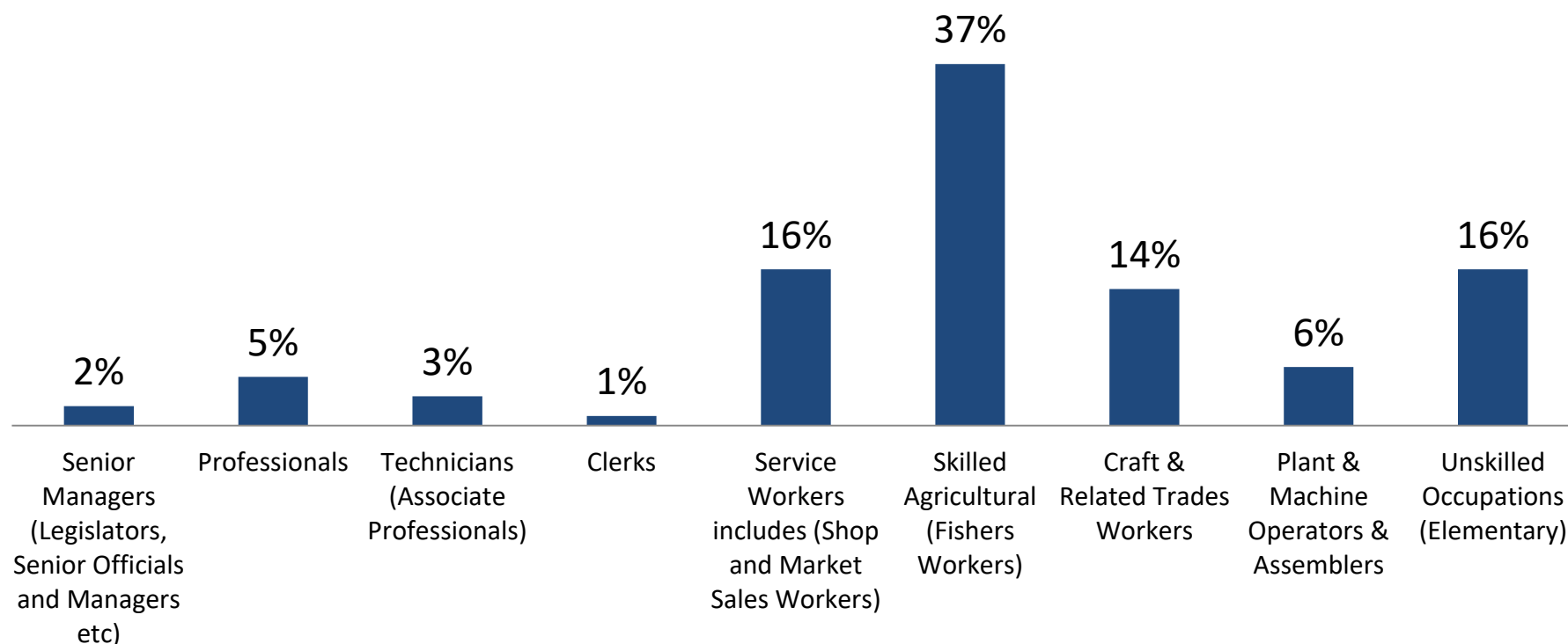
58% of Pakistanis are literate and among them 31% have studied up to primary and 34% have studied from primary to middle

Education Level of Population of Pakistan



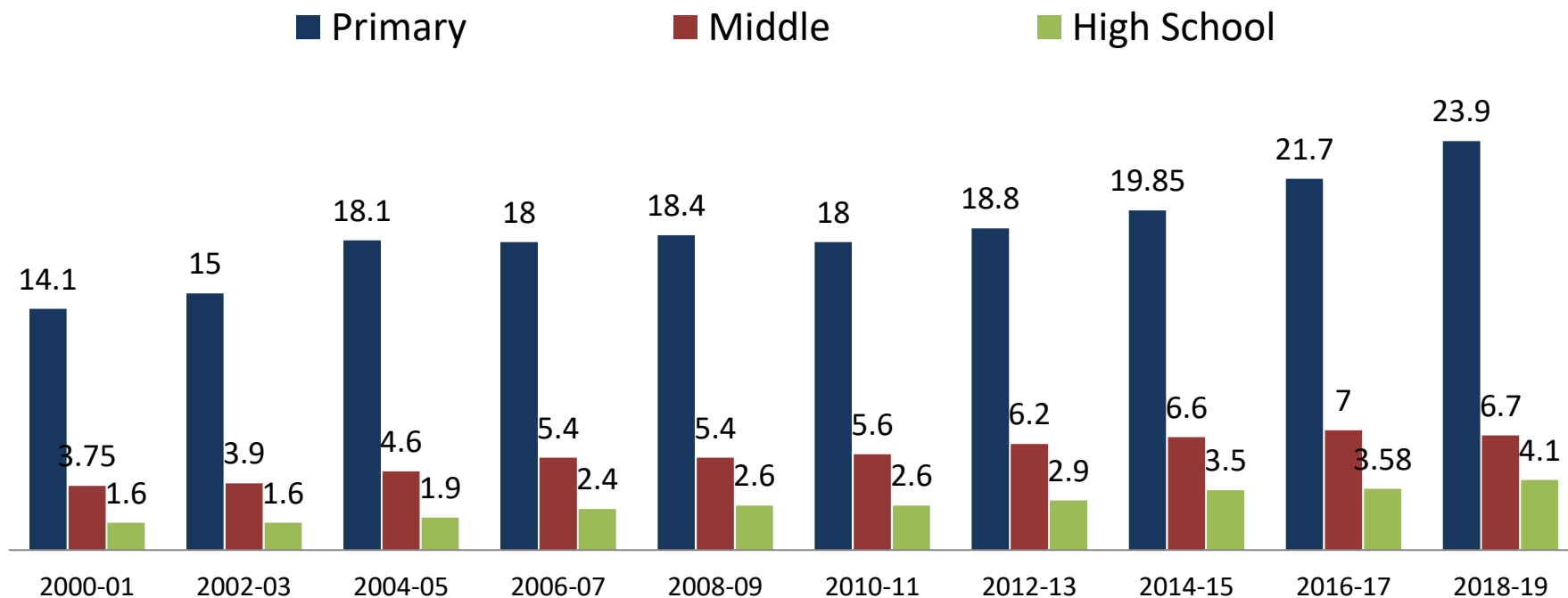
32% of the Pakistanis are part of the labor force and among them 37% are skilled agricultural workers

Education Level of Population of Pakistan

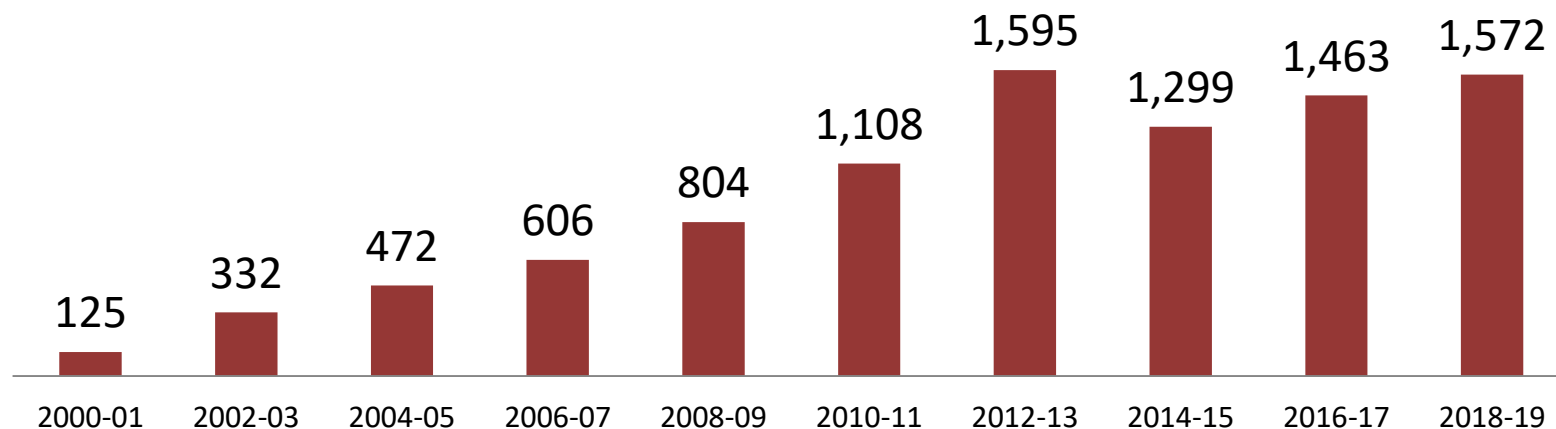


School Enrollment

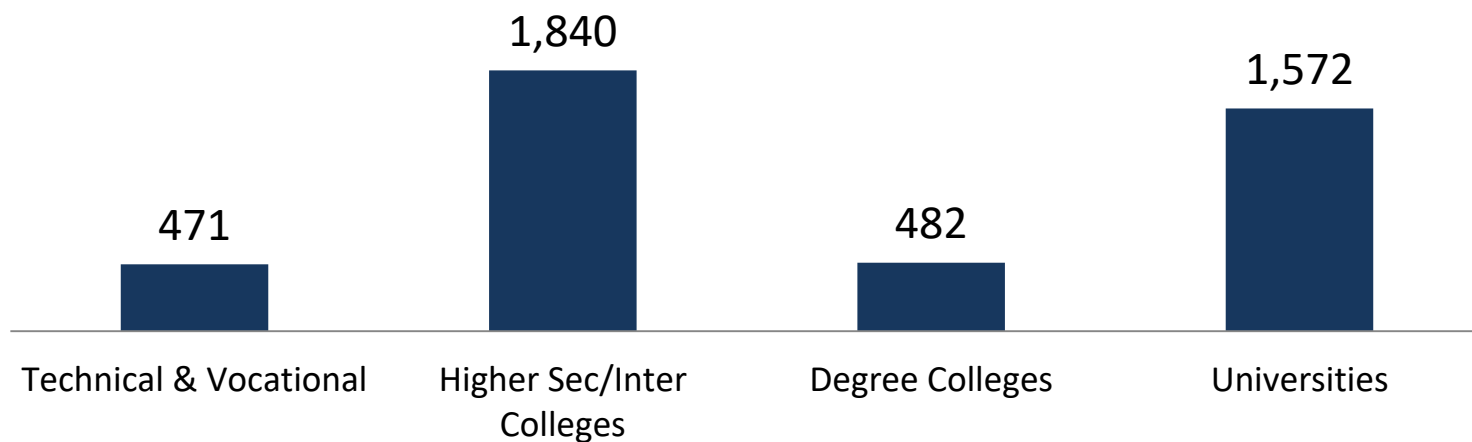
Total Enrollment in Schools (millions)



Total Enrollment in Universities (thousands)



Total Enrollment in 2018-2019 (thousands)



Section 1: Mobile phone – ownership and usage

Section 2: Internet – Awareness and usage

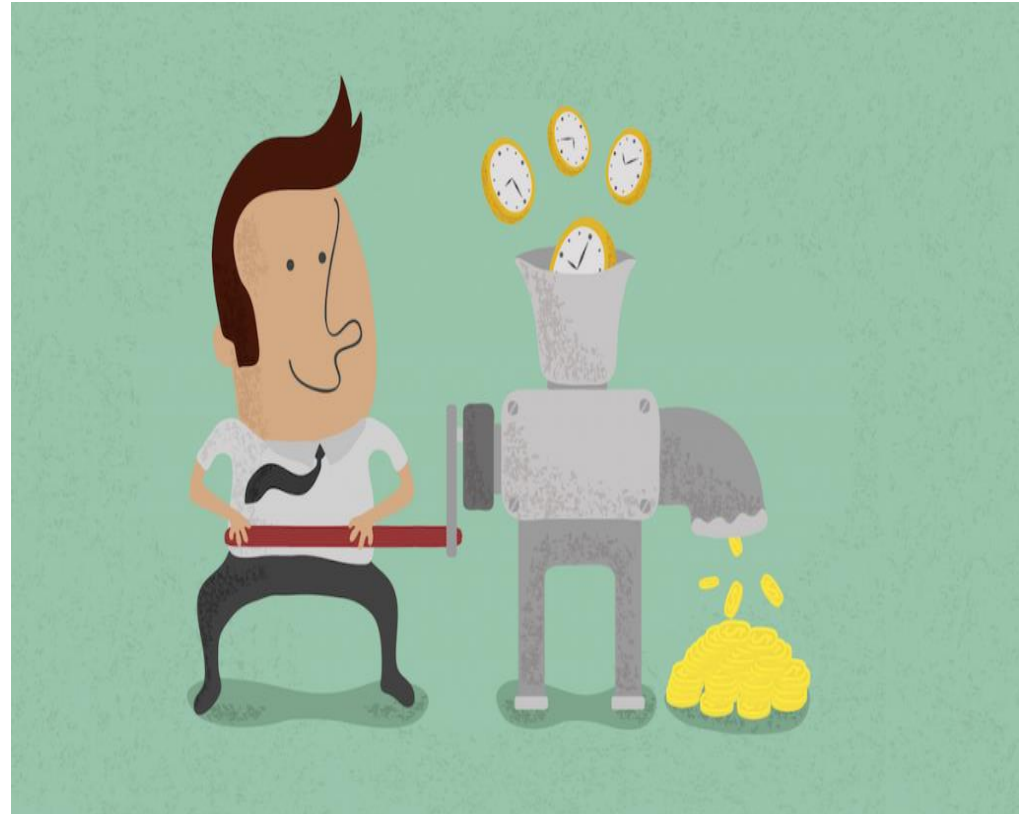
Section 3: Demographics

Section 4: Why Pakistan?

- Zero Income tax on IT & ITeS exports till June 2025
- Zero Income tax for PSEB registered IT start-ups (3 years)



- 100% foreign ownership of IT & ITeS companies.
- 100% repatriation of profits to foreign IT & ITeS investors.



Source: <https://www.pseb.org.pk/why-pakistan2>

Tax holiday for venture capital funds till 2024.



Source: <https://www.pseb.org.pk/why-pakistan2>

- Up to 70% on annual operational expenses by investing in IT & ITeS sector in Pakistan.
- On average, the annual cost for a software engineer in Pakistan is one fifth of the cost in USA and Europe.



Source: <https://www.pseb.org.pk/why-pakistan2>

- Provision of low rent space in Software Technology Parks (STPs), with fiber-optic connectivity.

Pakistan has more than 15 IT parks with IT-enabled infrastructure with more being planned in future.



- Pakistan has more than 3,000 active IT & ITeS-BPO companies out of which 110 are certified in quality standards such as ISO 9001 and ISO 27001 and 22 are certified in Carnegie Mellon's CMMI standard.



This guarantees the quality of their software development processes and products.

- Pakistan has more than 800 call centers with expertise in both inbound and outbound calling including technical support and telemarketing.
- Pakistan has more than 300,000 English-speaking IT & ITeS-BPO professionals and graduates and this pool is growing every year.



Source: <https://www.pseb.org.pk/why-pakistan2>

For more details, contact:
isb@gallup.com.pk

About Gilani Research Foundation

Gilani Research Foundation is a not for profit public service project to provide social science research to students, academia, policy makers and concerned citizens in Pakistan and across the globe. Gilani Research Foundation is headed by Dr. Ijaz Shafi Gilani who pioneered the field of opinion polling in Pakistan and established Gallup Pakistan in 1980. Currently Dr. Gilani, who holds a PhD from the Massachusetts Institute of Technology (MIT) and has taught at leading universities in Pakistan and abroad, is Chairman of Gallup & Gilani Pakistan.



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