

Research ICT Africa Beyond Access Study: Rwanda Report Summary

This report gives a summary of a study conducted in Rwanda aiming at obtaining qualitative information that reflects perceptions about how people use Internet when they have their data subsidized and when they do not. Nine Focus Group Discussions (FDGs) were conducted in that perspective in different geographical areas of the country over a two week period to a total of 110 participants from urban, peri-urban and rural locations and selected from a wide range of views and opinions conditioned by gender, income levels (*Ubudehe* categories applicable in Rwanda), employment status, education, and exposure (or not) to Internet use to test research hypotheses on the use and impacts of subsidized services.

The results from the discussions showed that, overall, there is no direct linkage between gender and the use of Internet apart from the time spent on Internet with males spending more time on Internet compare to females; and the locations of participants do not have substantial differences in terms of use of Internet due probably to the size of the country and availability of transport facilities across the country.

The more participants are educated the more they use Internet and spend more time on work related activities; with young people being more interested in social media and games while adults are more interested in email communication and local online news. It is a well-known economic fact that low-income households spend a higher share of their budgets on basic needs, and that a smaller share of spending goes toward basic needs as a household's income rises. FGD findings showed that the majority of participants from the first two categories of *Ubudehe* are non-users of Internet, and for those who use Internet, the spending on Internet is still very low and comes far after spending on basic needs - defined as the major budget components of housing, food and health care.

Results from FGDs also revealed that the use of subsidized data services in Rwanda constitute a great part of the data use as it allows Mobile Network Operators keep a big number of subscribers that effectively use Internet even though the content they use is very limited to two or three services. Participants do move beyond the use of subsidized services only when they still have their respective bundles with available data but they have a lesser understanding of the potential of Internet beyond the few services that they regularly use.

The majority of participants with mid or high income when asked how they would react if subsidized data was no longer available, responded that they may reduce the time spent on Internet while participants with low income responded that they may stop using Internet. Participants with low income tend to use low price bundles with limited data capacity

particularly from AirTel and TIGO with options for *zero rated services* or other promotions while participants with relatively mid to high income prefer to take a monthly subscription on a flat rate basis or high price bundles that provide high capacity of data, mostly from MTN.

Barriers to use Internet include illiteracy and lack of understanding of foreign languages to manipulate devices and understand the Internet contents, financial resources to pay for smart phones and buy Internet data and limited awareness on the benefit of using Internet. This is particular true for participants living in rural areas.

There is a need to promote the optimal use of Internet through public awareness to allow users to make appropriate choices when they buy bundles or packs.