



GSMA Case Study – Asiacell Almas Line

Introduction & Context

In early 2011, the percentage of women making up Iraqi mobile users for Iraqi mobile operator Asiacell and its competitors stood at 20%. This figure, initially lower, had nevertheless remained flat since 2002 despite efforts made to promote existing products aggressively to women. Iraq had therefore one of the worst mobile gender gaps, and operators were struggling to find a way to break into this untapped market. This struggle was all the more frustrating as the barriers to mobile adoption among women were well known, thanks to significant market research engagements conducted over recent years. These barriers included: i) lack of purchasing power; ii) risk of harassment from men; iii) reluctance to visit sales shops with almost exclusively male sales representatives and customers; iv) ignorance about mobile telephony combined with reluctance in calling customer care agents which could be men; v) concerns from husbands.

In this context, Asiacell's leadership decided to shift the strategy completely: in the past the focus had been on "tweaking" existing products and advertising to reach women more effectively. As of 2011, the decision was made to build an offer from scratch which would address the specific issues faced by Iraqi women.

Proposed Approach

When Asiacell's top management decided to commit energy and resources to address women's needs, the first steps involved benchmarking what had been done in other markets, and specifically those considered quite conservative. It appeared that initiatives had been launched in Pakistan, Bangladesh and Saudi Arabia, but most of those consisted simply of rebranding existing solutions for women, along with a loyalty program where points could be redeemed against "women-oriented" gifts. Asiacell's leadership considered this did not go far enough: it decided that what should be done was to develop a product which at its heart was made specifically for women. This product was named 'Almas,' a synonym in Arabic for 'diamonds.'

From the outset, the team which developed the Almas line understood that Iraqi women had needs which to a large extent were different from men: for example, traffic patterns for men and women were different throughout the day; receiving calls from strangers could be much more than a simple nuisance and in fact erode women's reputation, and so on. The idea behind the Almas Line was thus to build a specific proposition, which came with unique features, matching the needs of Iraqi women. Those features included:

- Step charging – activating a 50% discount after the third minute of airtime used in a conversation: this stems from the fact that average call duration for women is significantly higher than men. It also addressed women's purchasing power constraints

- Freedom to choose their own off-peak hours during the day - since data-mining and market research displayed that women did not have the same daily call patterns as men, the decision to offer them flexible off-peak hours allowed them to tailor their tariff to their needs
- Discounted rates for off-network calls - women were found to be less likely to have multi-SIMs (ie SIMS from various operators), therefore special effort was exerted to offering off-network rates to protect their purchasing power and maintain their brand loyalty
- Free “Bye-bye” service - this exclusive feature offers women the possibility to block any number from calling or texting her. It thus addresses the issue of harassment (which is a serious concern in Iraq)
- Exclusive Almas line Value Added Services menu with 50% discount on its female-focused contents related to family health, cooking recipes, beauty tips etc.

This development phase, spearheaded by Asiacell’s marketing team with the support of sales and technical departments, led to the full launch of Almas line on July 7th, 2011.



Results

In the 9 months since its launch, more than 250,000 women have purchased the Almas line (representing ~10% of gross activations). This, combined with the share of women buying “standard” prepaid packages (~25%), allows Asiacell to estimate that women, since the launch of Almas, represent between 28%-32% of all activations. This is a massive increase which can be attributed to the direct impact of Almas line (i.e. direct sales), but also to the indirect impact (i.e. changed perception of Asiacell among Iraqi women who now consider this company as “for them”). Based on current forecasts established by the marketing team, Asiacell aims at having women make up 35%-40% of its customer base by the end of year 2012 (i.e. almost double the figure of early 2011). Asiacell’s contribution to closing the gender gap is thus highly tangible and measurable.

Additionally, Asiacell is breaking “mental barriers.” In the most conservative places of Iraq, mobile penetration amongst women stands at single digit levels. There, Almas line features, such as call blocking, addresses husbands’ concerns, thus opening up mobile telephony to their wives and daughters.

The long-term impact is expected to be much wider: competitors, seeing the success of Almas Line, may want to develop their own female focused products and services, thus further encouraging mobile ownership amongst women.

Finally, an unforeseen impact on the mobile gender gap relates to the mobile internet: use of GPRS among Almas users is higher than average. This is thought to be because Almas offers women an easier, more comfortable option to connect to the internet than in public internet cafés where women can be harassed.

Next Steps

Several upgrades to the Almas line are scheduled for 2012. Two will be launched as pilots: these are women-only sales outlets (with a strong focus on the most conservative regions) and routing of Almas customers’ care calls through to a specific customer care centre with female-only agents. Other projects will be announced in Q2 2012. To reach all Iraqi women, there may be a need for yet further innovation as the year progresses.

In line with its approach of “listening first” to its customers, Asiacell launched in Q4 2011, a broad research project amongst women users of not only the Almas line, but also women users of standard tariffs and non-users as well. The research, which incorporates both quantitative and qualitative techniques, aims to capture what can be done to keep on bridging the mobile gender divide. Specific attention in this research is put on non-users, to understand if their lack of connection results from the “supply” side (i.e. if the Almas Line, or competitors’ lines, are not adapted adequately to them) – which could be fixed by the operators, or with the “demand” side (i.e. the women do not want a mobile, or do not perceive the need to own one) which would require a different approach, and potentially partnerships with aid organizations or government to educate the market on the benefits of mobile telephony. Results will hopefully trigger further innovation helping Asiacell to close once and for all the mobile gender divide.

Low penetration of mobile telephony among women is not an immutable fact. It can be overcome. This has been Asiacell's belief since the beginning of the Almas project. And it has been proven true.

The GSMA mWomen Programme

Asiacell is a member of the GSMA mWomen Programme Working Group of mobile industry companies.

The GSMA mWomen Programme is an unprecedented global public-private partnership between the worldwide mobile industry and the international development community. The Programme aims to reduce the mobile phone gender gap by 50% by 2014, enabling mobile ownership and effective usage for more than 150 million women in emerging markets. The Programme will also catalyse the creation of life-enhancing mobile services such as healthcare, finance, education and entrepreneurship.

This will be achieved through a combination of research, grants for mobile operators and NGOs, toolkits, and knowledge sharing through the mWomen online community, seminars, and the GSMA mWomen Working Group, which includes more than 30 partners from the mobile industry.

Launched by U.S. Secretary of State Hillary Rodham Clinton in October 2010, the GSMA mWomen Programme is funded by USAID, AusAID, GSMA and Visa Inc., and is supported by a global network of champions including Cherie Blair, Founder, Cherie Blair Foundation for Women; Helen Clark, Administrator, United Nations Development Programme; President Ellen Johnson Sirleaf, Liberia; H.E., Mrs. Sia Nyama Koroma, First Lady of the Republic of Sierra Leone; Hon. Kamla Persad-Bissessar, Prime Minister of the Republic of Trinidad & Tobago; Dr. Judith Rodin, President, Rockefeller Foundation; and Madam Tobeka Madiba Zuma, First Lady of South Africa. For more information, please visit www.mwomen.org.