Promoting broadband connectivity in Myanmar

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Helping policy makers, media and stakeholders understand the ICT transformation

DEMAND-SIDE STUDIES: QUANTITATIVE & QUALITATIVE STUDIES, 2014-16
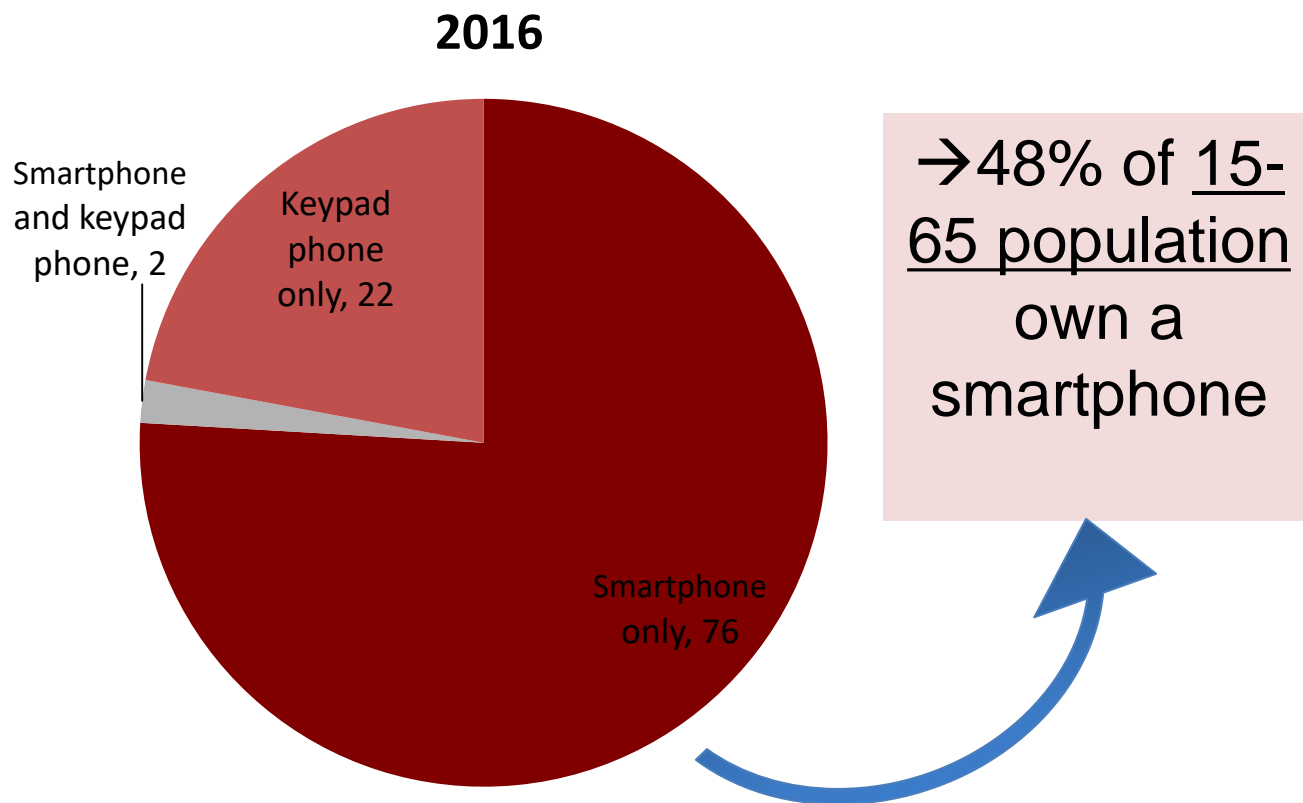
Representative of 97% of households and 96.3% of population aged 15 - 65

- At 3% margin of error, representative of
  - 96.3% population aged 15-65
  - 97% of total households
  - 91.8% of total population

- In all accessible areas of Myanmar; representative of 298 of 330 townships
  - 32 townships excluded due to security concerns

LIRNEasia
Pro-poor. Pro-market.

Survey locations
Source: Survey Solutions
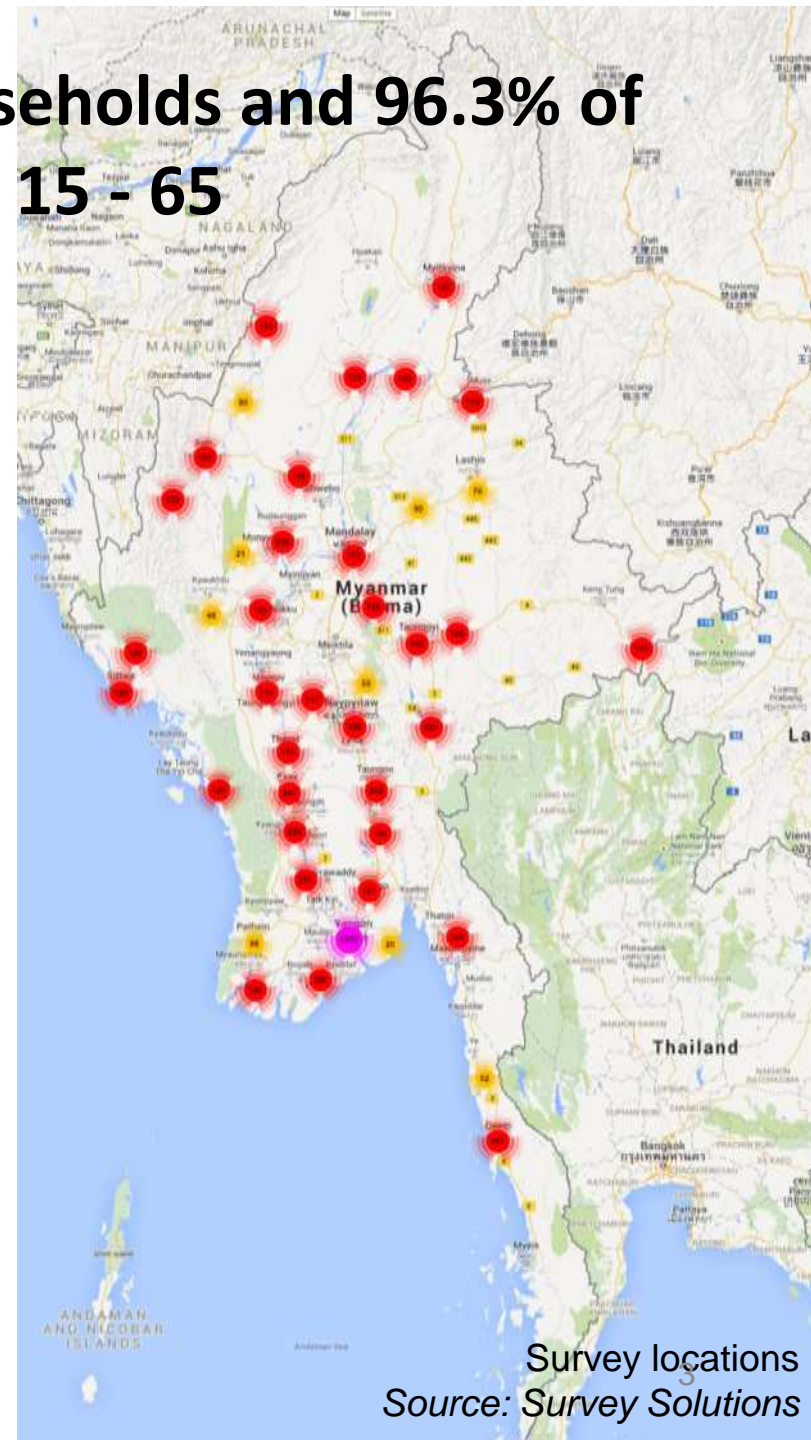
78% of mobile owners own smartphones. In 2015 it was 66%

Mobile handset type (% of mobile owners)

2016

Smartphone and keypad phone, 2

Keypad phone only, 22

Smartphone only, 76

→48% of 15-65 population own a smartphone

Q: How many number of functioning smartphones ('touch phones')/ keypad handsets do you own?

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Source: LIRNEasia 2016 nationally representative survey. Base: Mobile phone owners

49% of handset owners use data services; many in rural areas also use mobile data services

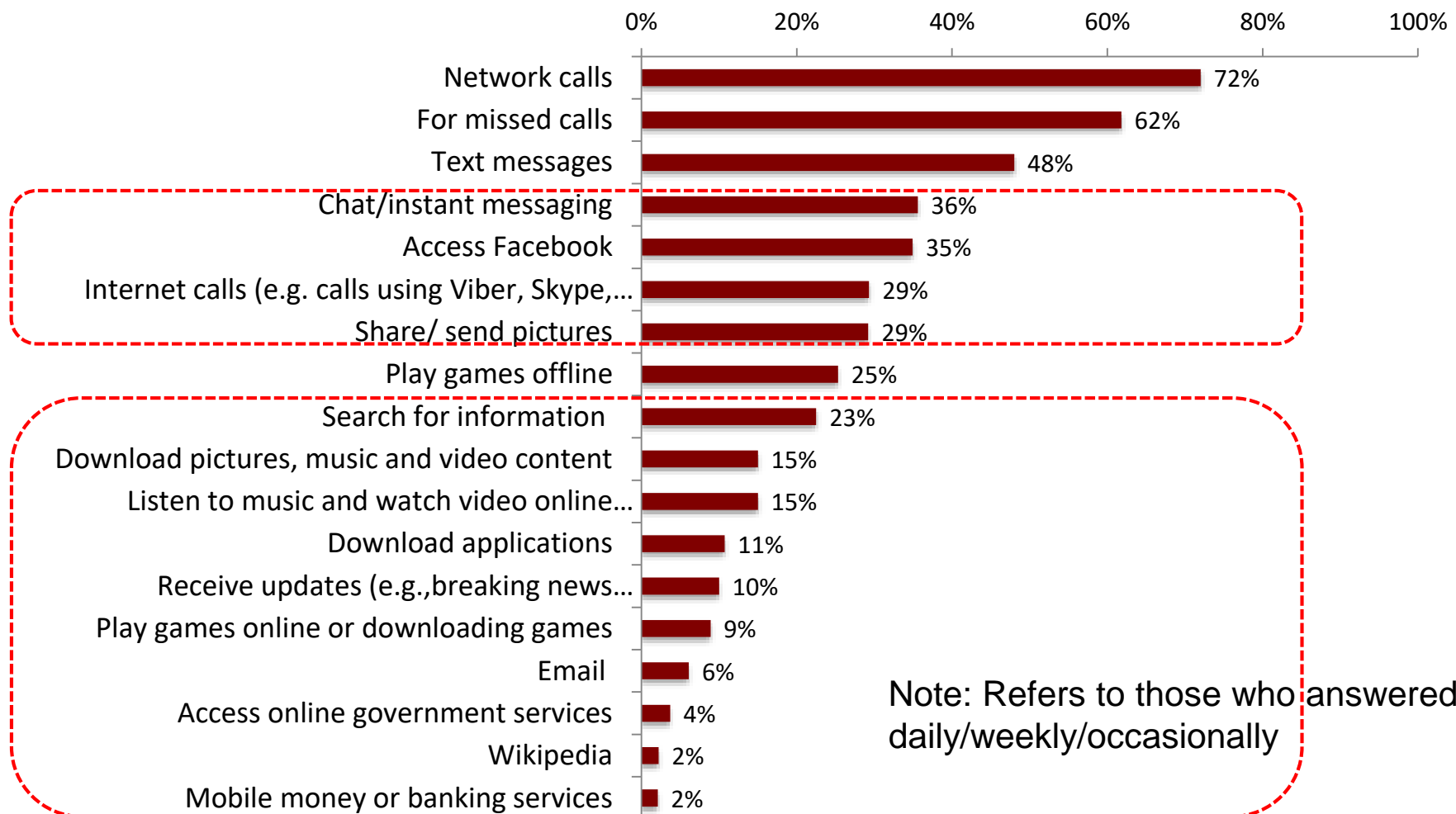Use of data services on mobile (% of mobile handset owners)
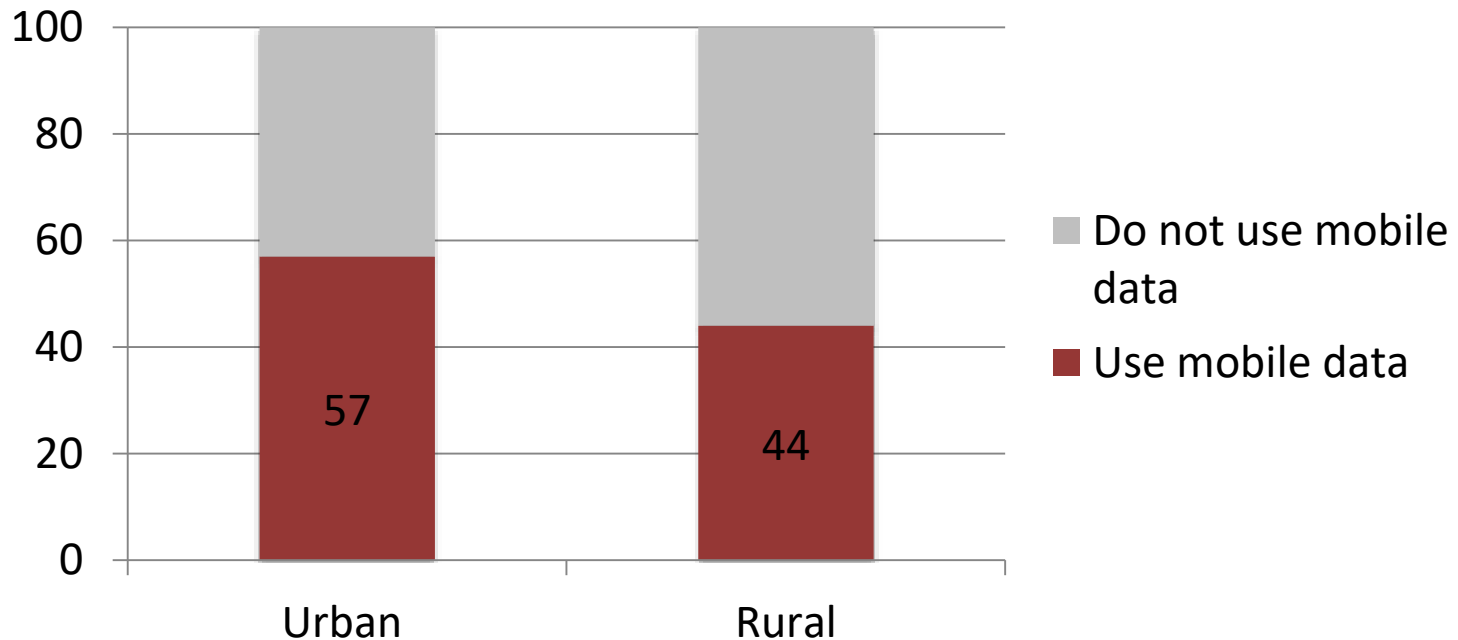
Note: Refers to those who said they use various data services daily/weekly/occasionally

Though network calls & text messages still dominate, there is high data use by mobile owners

Uses of mobile phone (% of mobile handset owners)

Use	Percentage
Network calls	72%
For missed calls	62%
Text messages	48%
Chat/instant messaging	36%
Access Facebook	35%
Internet calls (e.g. calls using Viber, Skype,...	29%
Share/ send pictures	29%
Play games offline	25%
Search for information	23%
Download pictures, music and video content	15%
Listen to music and watch video online...	15%
Download applications	11%
Receive updates (e.g.,breaking news...	10%
Play games online or downloading games	9%
Email	6%
Access online government services	4%
Wikipedia	2%
Mobile money or banking services	2%

Note: Refers to those who answered daily/weekly/occasionally

Q: Please tell me how often you use your mobile phone for any of the following purposes?

Source: LIRNEasia 2016 nationally representative survey. Base: Mobile handset owners
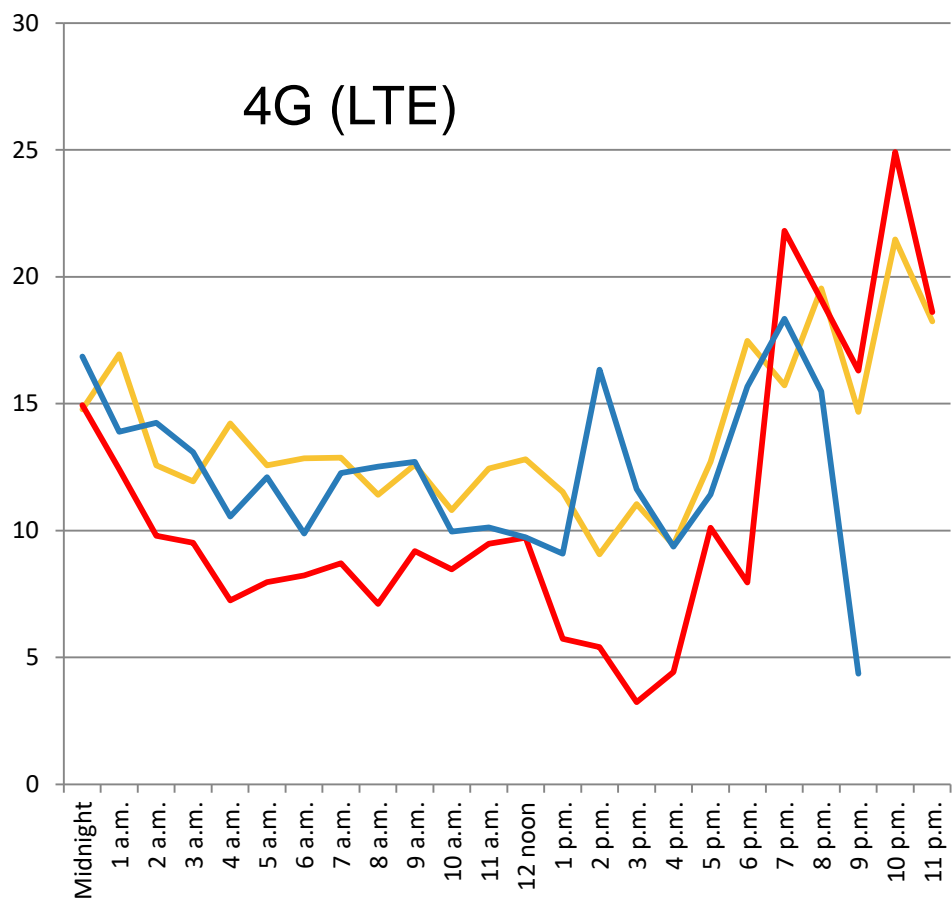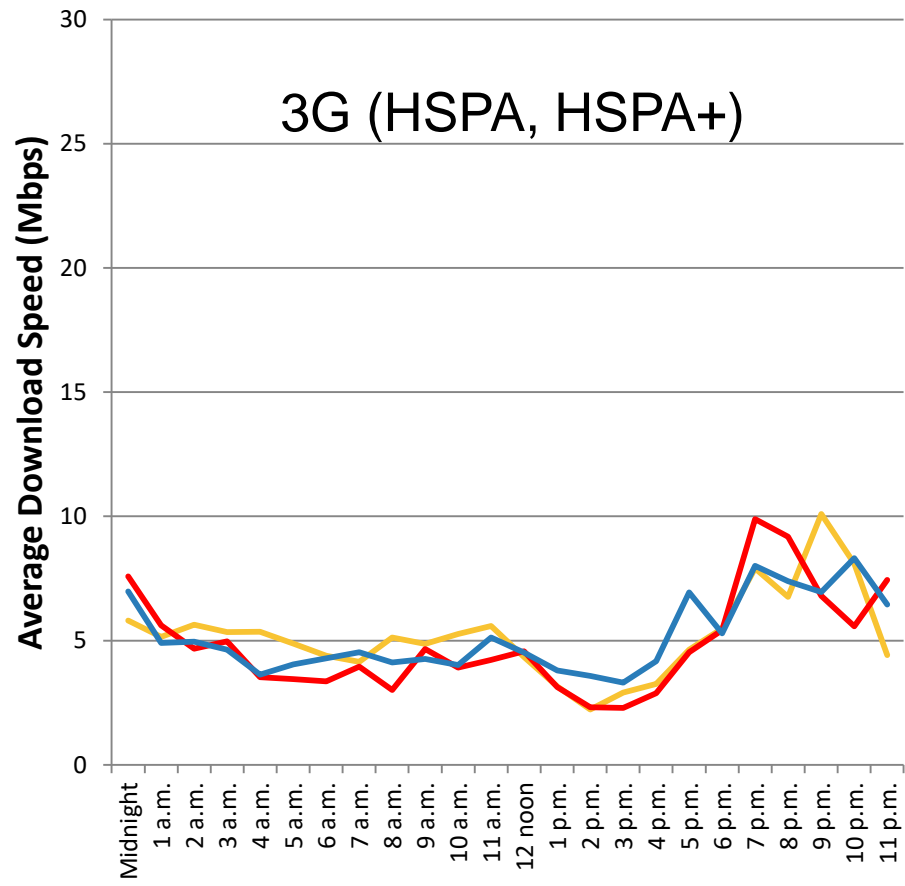
ASSESSING BROADBAND QUALITY OF SERVICE EXPERIENCE

A crowd-sourced approach: #BetterInternet campaign run by MIDO via social media

- 9000+ results covering all states/divisions of Myanmar

- Incentives
  - Contributing to "better Internet" in Myanmar
  - Being able to test network speeds whenever they want (not limited to duration of campaign)
  - Lucky draws
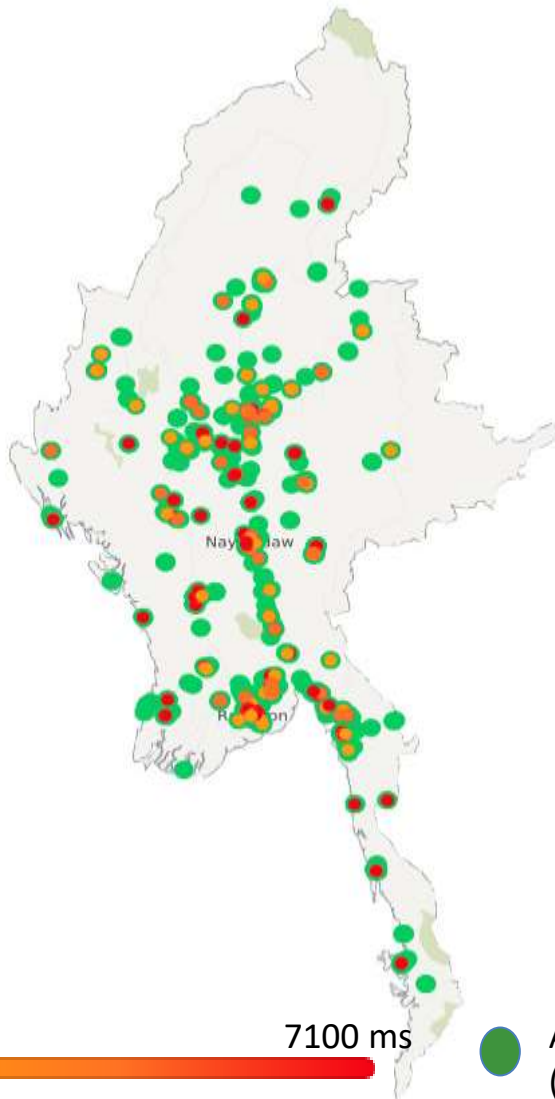
Download speeds; technology matters

3G (HSPA, HSPA+)

4G (LTE)

Average Download Speed (Mbps)

Ooredoo —— Telenor —— MPT ——

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Why does latency matter? Problematic across locations & operators

Service	Download (kbps)	Latency (ms)
Browsing (Text)	++	++
Browsing (Media)	+++	++
Downloading	+++	-
Transactions	-	++
Streaming media	+++	++
VOIP	+	+++
Games	+	+++

+++ Highly relevant; ++ Very relevant; + Relevant; - Irrelevant

(Source: Gonsalves, T.A & Bharadwaj, A., 2009)

Nay Pyi Taw

Rangoon

300 ms   7100 ms   ● All test locations / all technologies (including EDGE)

Markedly better over 4G but improvements needed

3G (HSPA, HSPA+)

4G (LTE)

Average latency (ms)

Singapore average

Lower the better

Singapore average

Ooredoo   Telenor   MPT

Source: LIRNEasia 2017 Broadband QoSE Benchmarks; IMDA Singapore
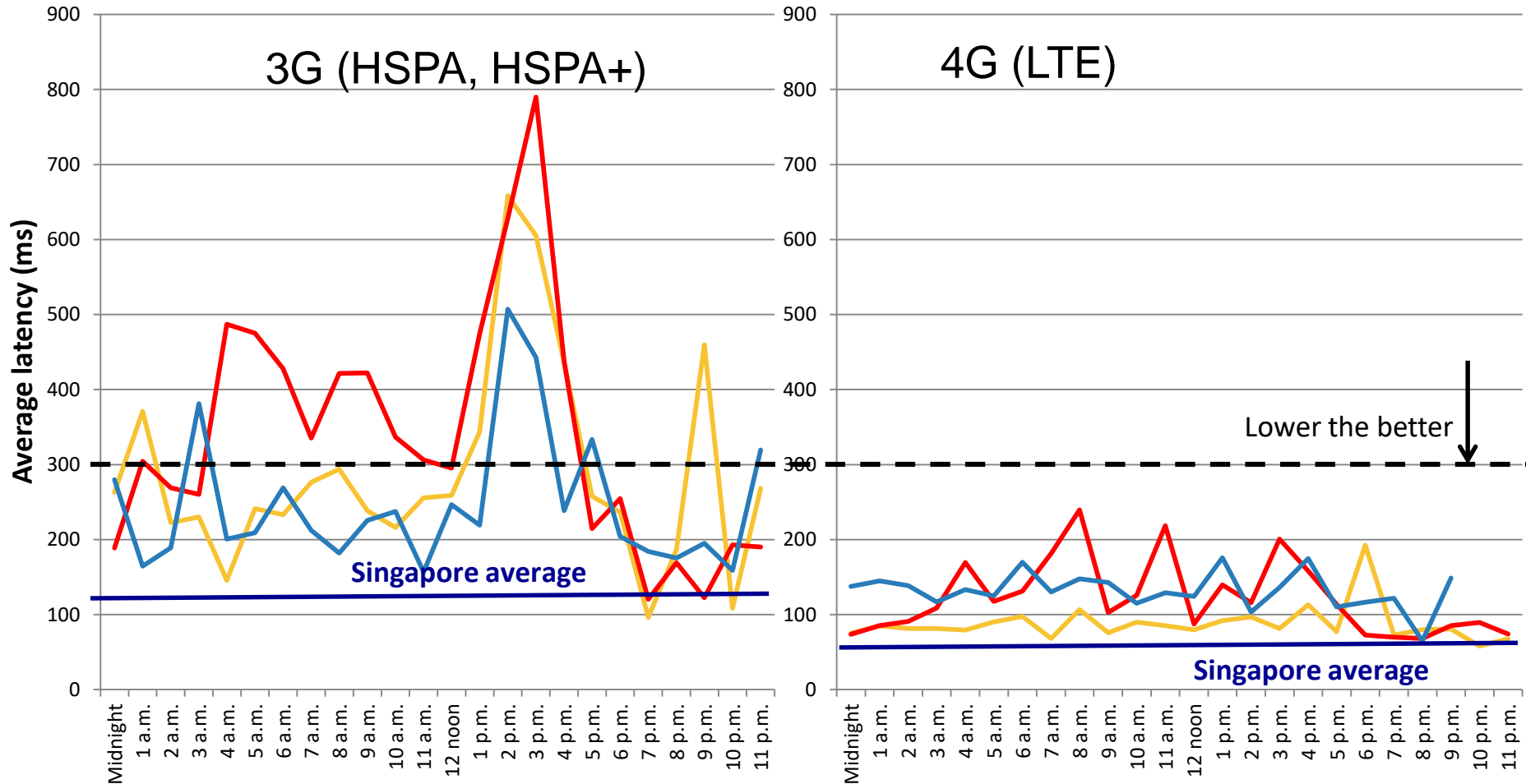
BUILDING CAPACITY ESSENTIAL TO ACHIEVE BROADBAND FOR ALL

LIRNEasia's contributions

- Regulatory module for government officials & civil society, Nay Pyi Taw, August 2013

- Four-day residential course for civil society & government officials, Taungoo, October 2013

- Course for Union Leguslators in Yangon, July 2014

- Courses for Regional Legislature and Union Legislators, June 2016

- Regulatory experience sharing with staff of PTD, September 2017