

# Knowledge, information and communication habits and needs in Myanmar: Stories from the field

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# LIRNEasia and MIDO: research, capacity building, policy interventions in Myanmar

- Demand-side research on ICT needs and uses
  - Nationally representative survey on ICT needs and usage in Myanmar (2015)
  - Qualitative study of 124 low income urban micro-entrepreneurs (2014)
- Training of 20 Parliamentarians from 6 political parties (2014)
  - on ICT Sector Policy making and regulation
- Detailed Comments on the proposed Telecom Law (2014)
- Translation and publication of books into Myanmar language (2014)
  - Ling, Donner (2009). *Mobile Communication*
  - Elder, Samarajiva, Gillwald (2013). *Information Lives of the Poor*
- Training of civil society organizations, government and private sector on ICT sector policy making, regulation, monitoring of sector performance, how to be good consumers of research
  - 2014, with IDRC & OSI funding
  - 2013, together with World Bank and GSMA, as soon as licenses were issued

New research

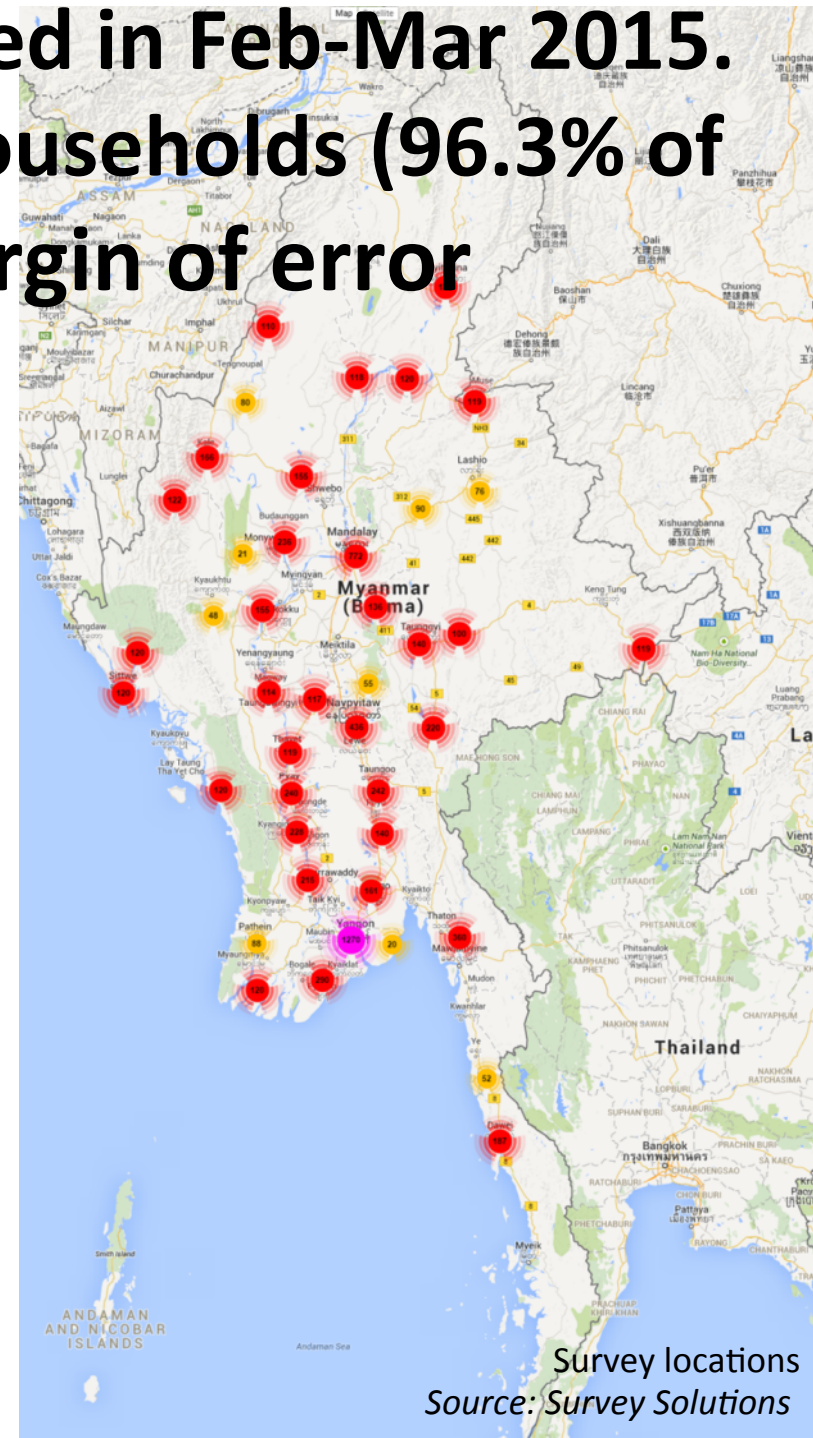
**NATIONALLY REPRESENTATIVE  
BASELINE SURVEY ON ICT NEEDS AND  
USAGE IN MYANMAR**

# Nationally representative survey on ICT needs and usage in Myanmar (baseline, in anticipation of at least one more survey)

- To establish a national baseline
  - Where Myanmar stands now
  - Measure impacts of mobile in 1 year (subject to funding)
- Focus on mobile and Internet (where in use)
- Data collected in Feb-Mar 2015 by CAPI from
  - 8,400 households
    - household level questionnaire (from household head)
    - individual level questionnaire (one individual, randomly selected, aged 15-65)
  - 500+ 'clusters' (urban=wards; rural=villages)
    - Cluster characteristics
    - Mobile network quality (using software on a mobile phone)
    - Retail prices of 20 household essentials (rice, gram, coconuts, etc.)

# Nationwide survey conducted in Feb-Mar 2015. Representative of 97% of households (96.3% of population) with $\pm 2.5\%$ margin of error

- Representative of population aged 15-65 in all accessible areas of Myanmar
  - 32 townships excluded due to security concerns
  - 97% of total households and 96.3% of total population represented with  $\pm 2.5\%$  margin of error
- Stratified four stage PPS cluster sampling design used; stratification by:
  - 1) Population size (big cities; other major cities; smaller townships)
  - 2) Geographic region (Delta, Eastern hills, Long coast, etc.)
  - 3) Urban/rural
- For full sampling details, see Methodology Note



Baseline survey findings

# **ACCESS**

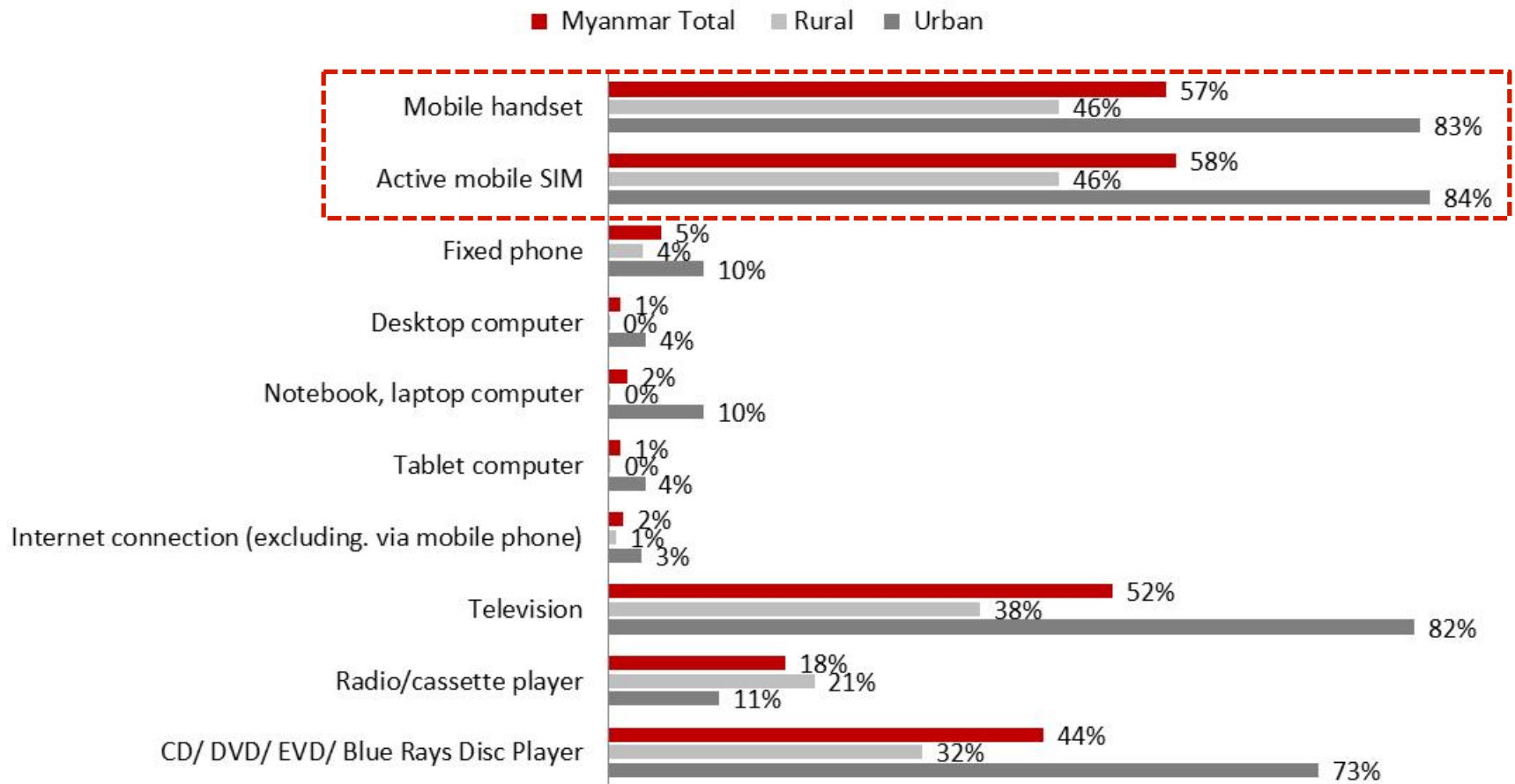
# More than 90% of wards/villages covered (has signal) and have re-load locations. But purchase of SIM and handset still limited to urban areas

		Wards (urban)	Villages (rural)	All Myanmar
Do you receive any mobile phone coverage in your ward/village?	Yes	96%	87%	90%
	No	3%	9%	7%
	Don't know	1%	4%	3%
Can you top-up your mobile phone credit in this ward/village?	Yes	96%	60%	72%
	No	4%	39%	28%
	Don't know	0%	1%	1%
Can you purchase a mobile SIM card in this ward/village?	Yes	84%	22%	42%
	No	17%	77%	57%
	Don't know	0%	1%	1%
Can you purchase a mobile phone handset in this ward/village?	Yes	82%	13%	35%
	No	18%	86%	64%
	Don't know	0%	1%	1%

Base: Ward/Village representatives

~ 60% of households have *at least 1* mobile phone and active SIM among members (half of these households have *more than 1*).

Access to ICTs and ICT services in the household (% of Myanmar households)



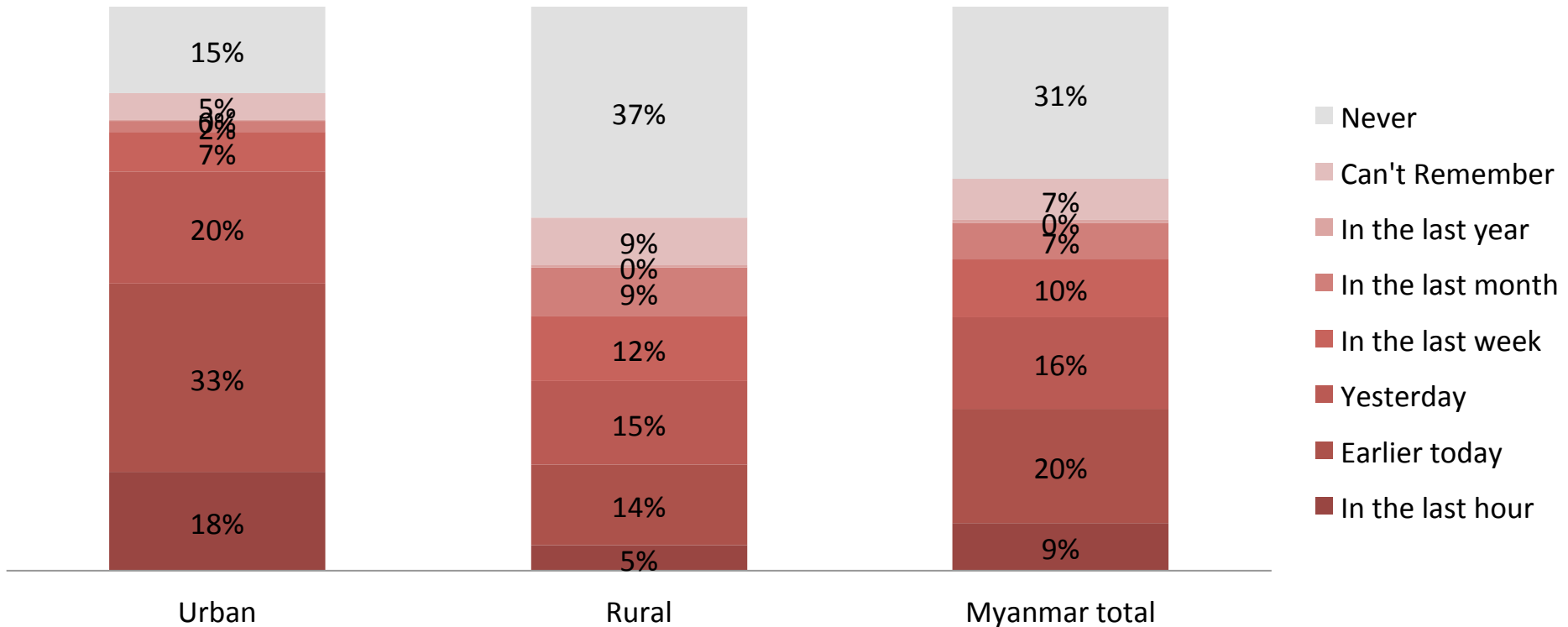


Baseline survey findings

**MOST RECENT PHONE USE:  
WHEN WAS THE LAST TIME YOU USED  
A PHONE?**

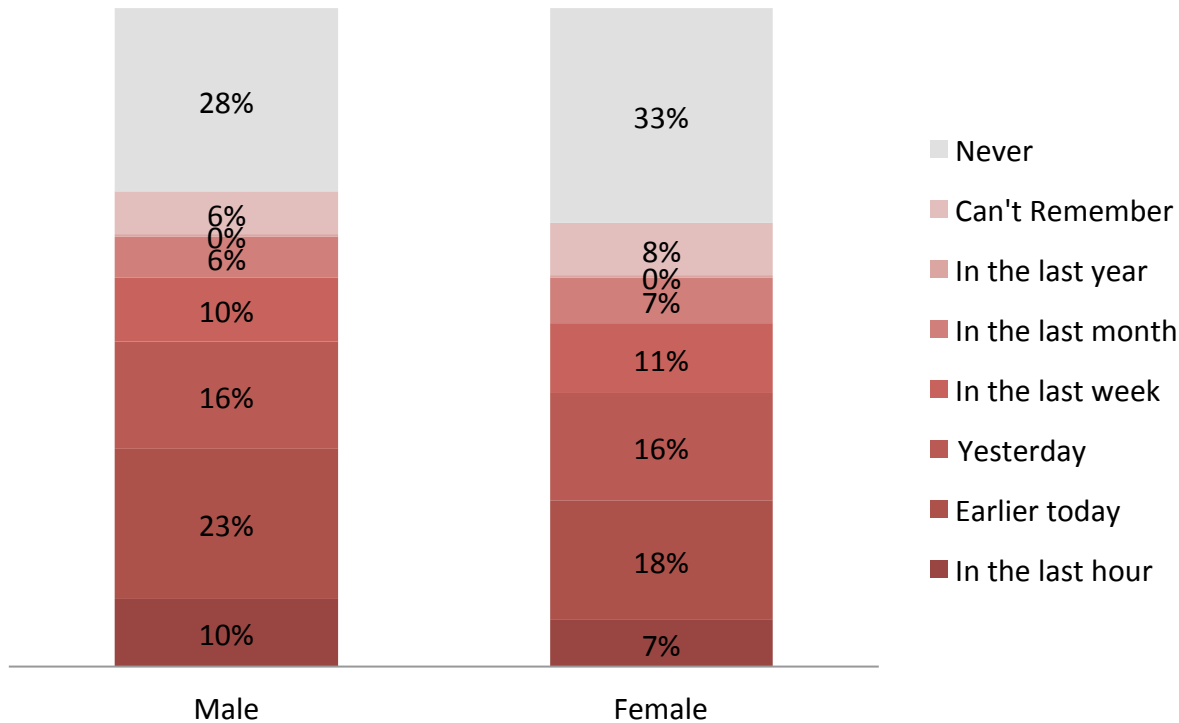
# 69% of 15-65 year olds in MM have used a phone before (teleusers); urban teleusers had more recent use than rural

When was the last time you used a phone? (% of 15-65 year olds)



# Small gender variation: males more frequent teleusers

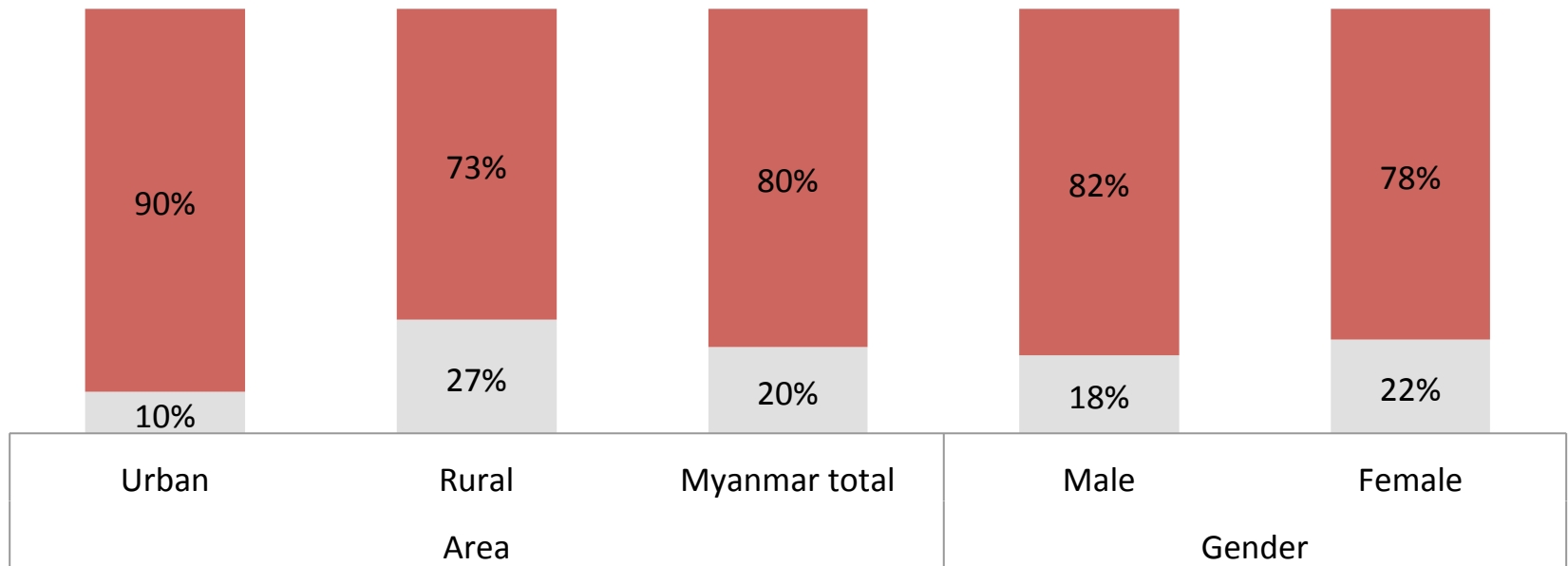
When was the last time you used a phone? (% of 15-65 year olds)



# 80% of teleusers said the last time they used a phone, it was a mobile (not nesc. their own)

What type of phone did you use last? (% of 15-65 year olds who have used a phone before)

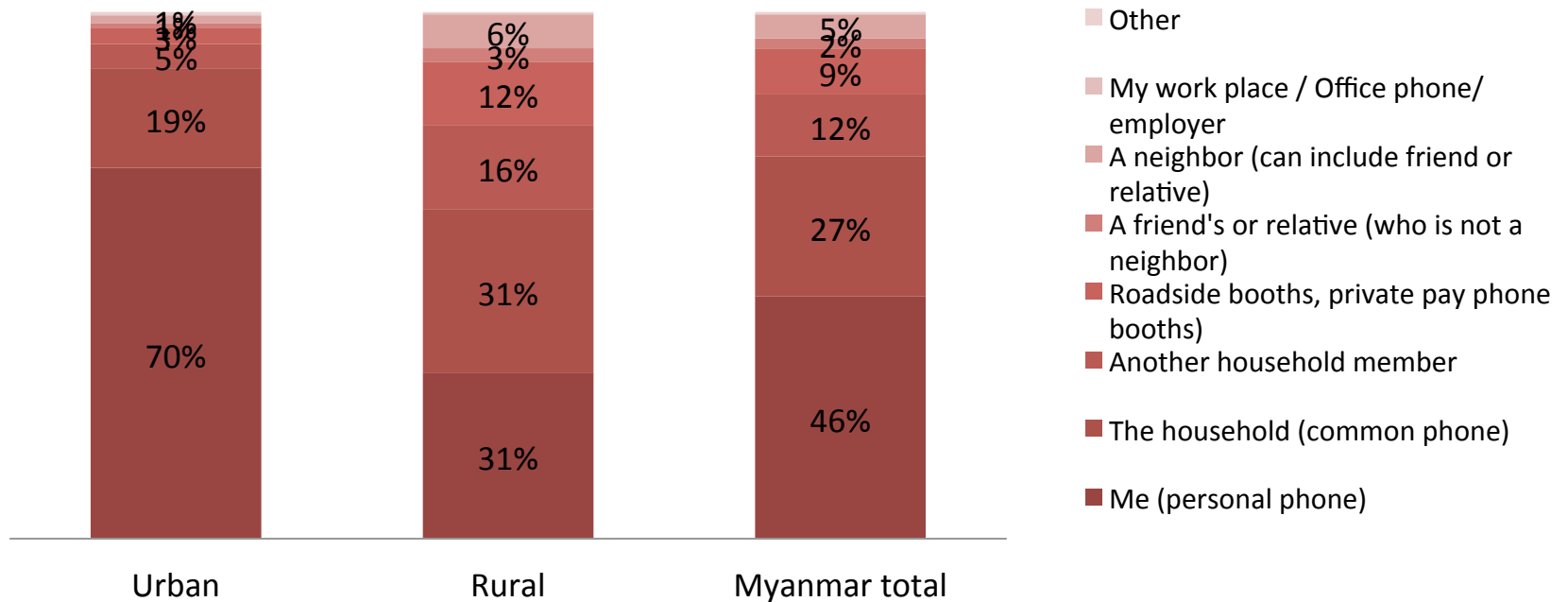
■ Fixed (landline) ■ Mobile (GSM or CDMA)



Base: Respondents who had ever used a phone before

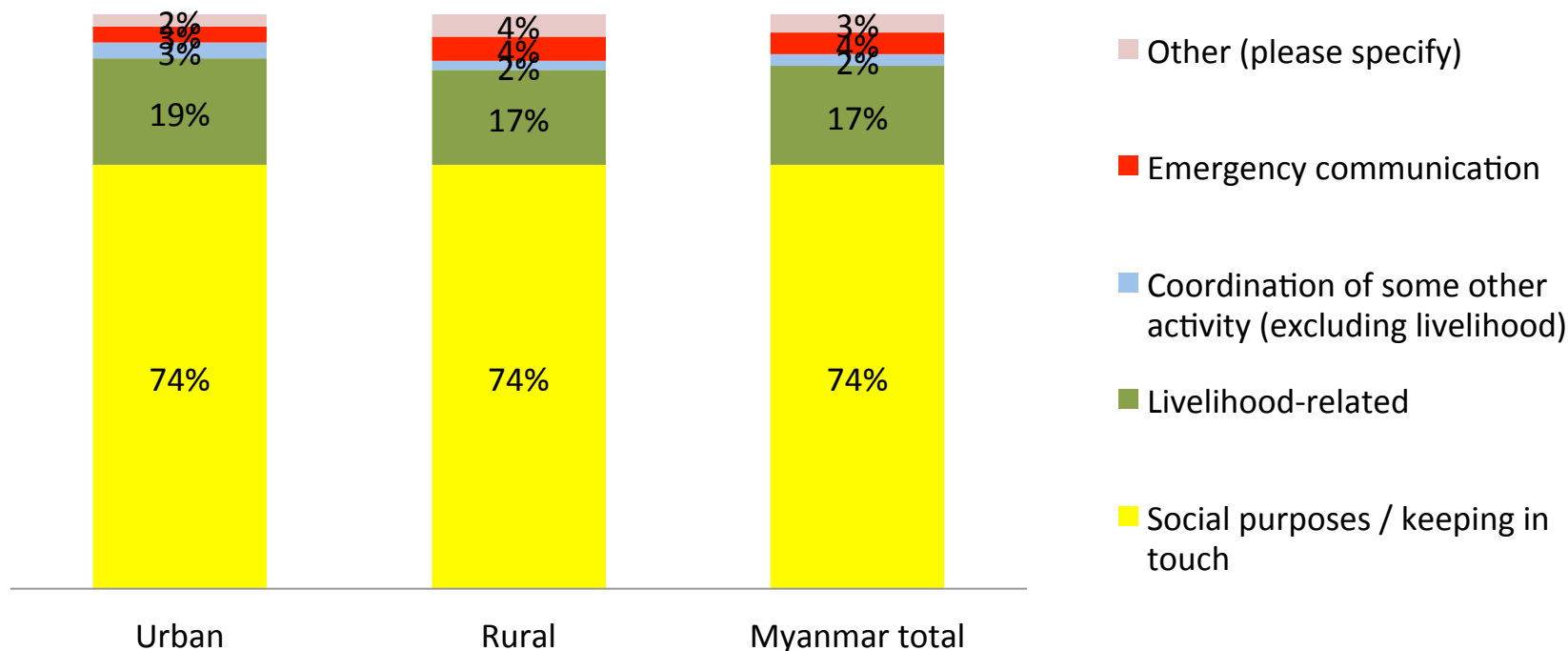
# Most either used their own phone or another one in the house. 78% of rural teleusers can get to a phone in the house

Whose phone did you use last? (% of 15-65 year olds who have used a phone before)



# Calls mostly for social purposes, some livelihood-related communication

Purpose of the last call made or received (% of 15-65 year olds who have used a phone before)

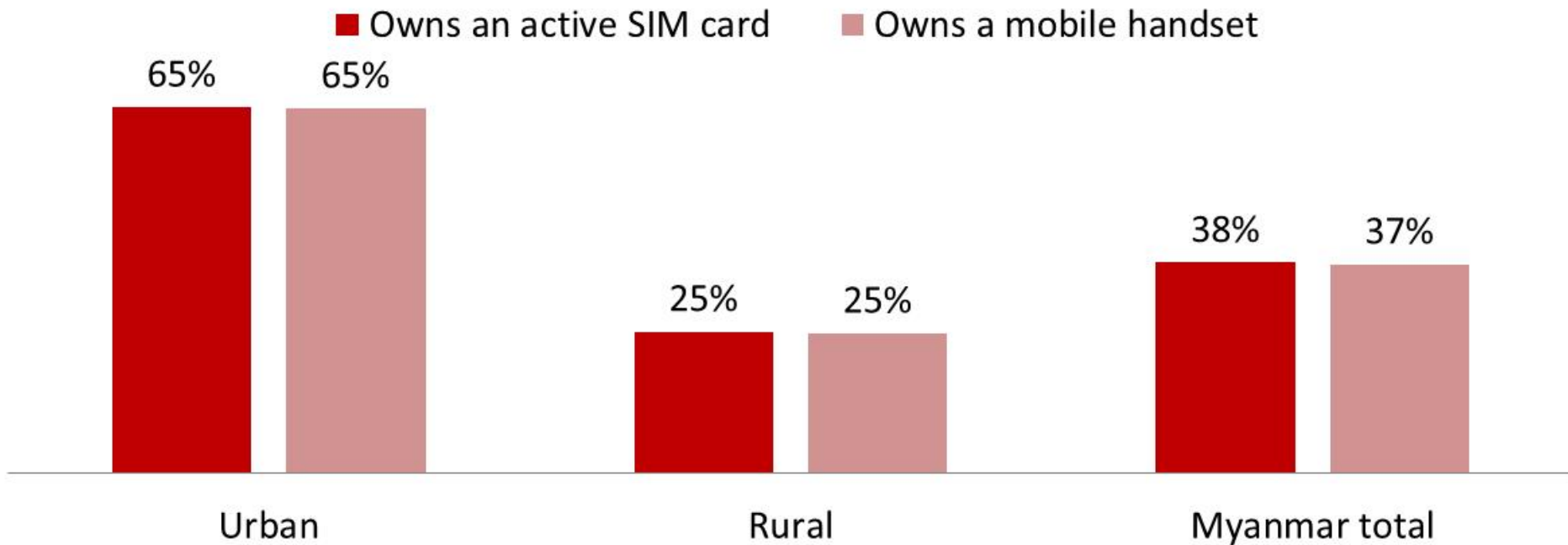


Baseline survey findings

# **MOBILE SUBSCRIBERS: OWNERSHIP AND USAGE**

# 38% Myanmar 15-65 population are mobile subscribers. ~ Matches govt./operator reported data

## Mobile SIM and handset ownership (% of 15-65 year olds)

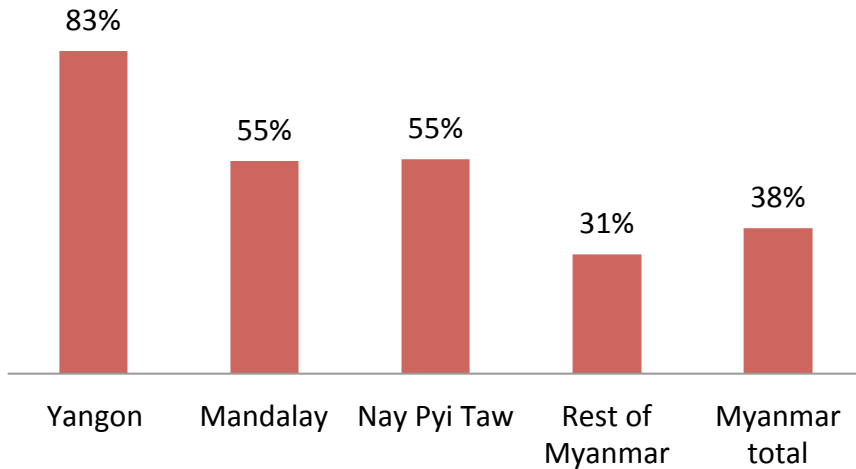


- City-wise SIM penetration:
  - Yangon-83%; Mandalay-55%; Nay Pyi Taw-55%

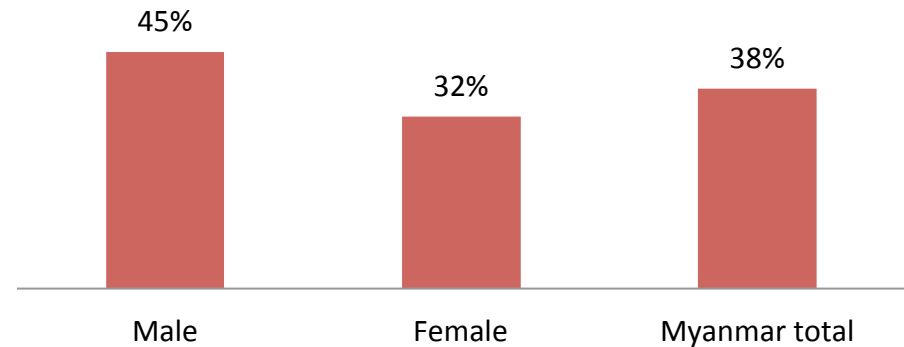


# Adoption driven by big cities; Gender gap in exists; No 'obvious' ageism

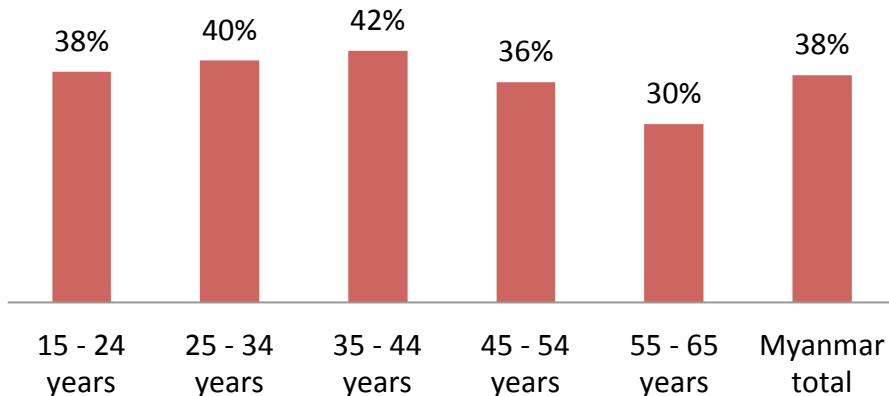
Mobile subscribers (% of 15-65 year olds)



Mobile subscribers by Gender (% of 15-65 year olds)

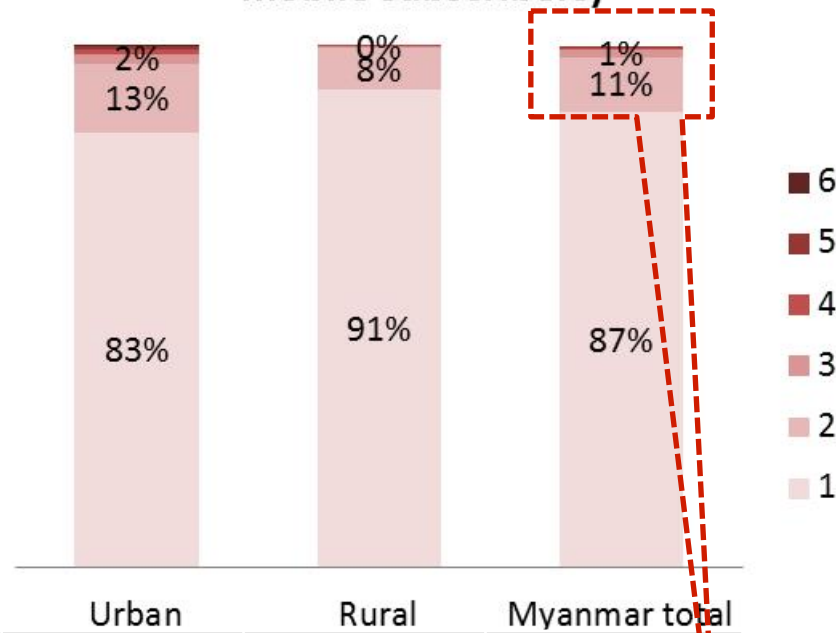


Mobile subscribers by age (% of 15-65 yr olds)



# 13% of mobile owners have more than one active SIM; higher in urban areas

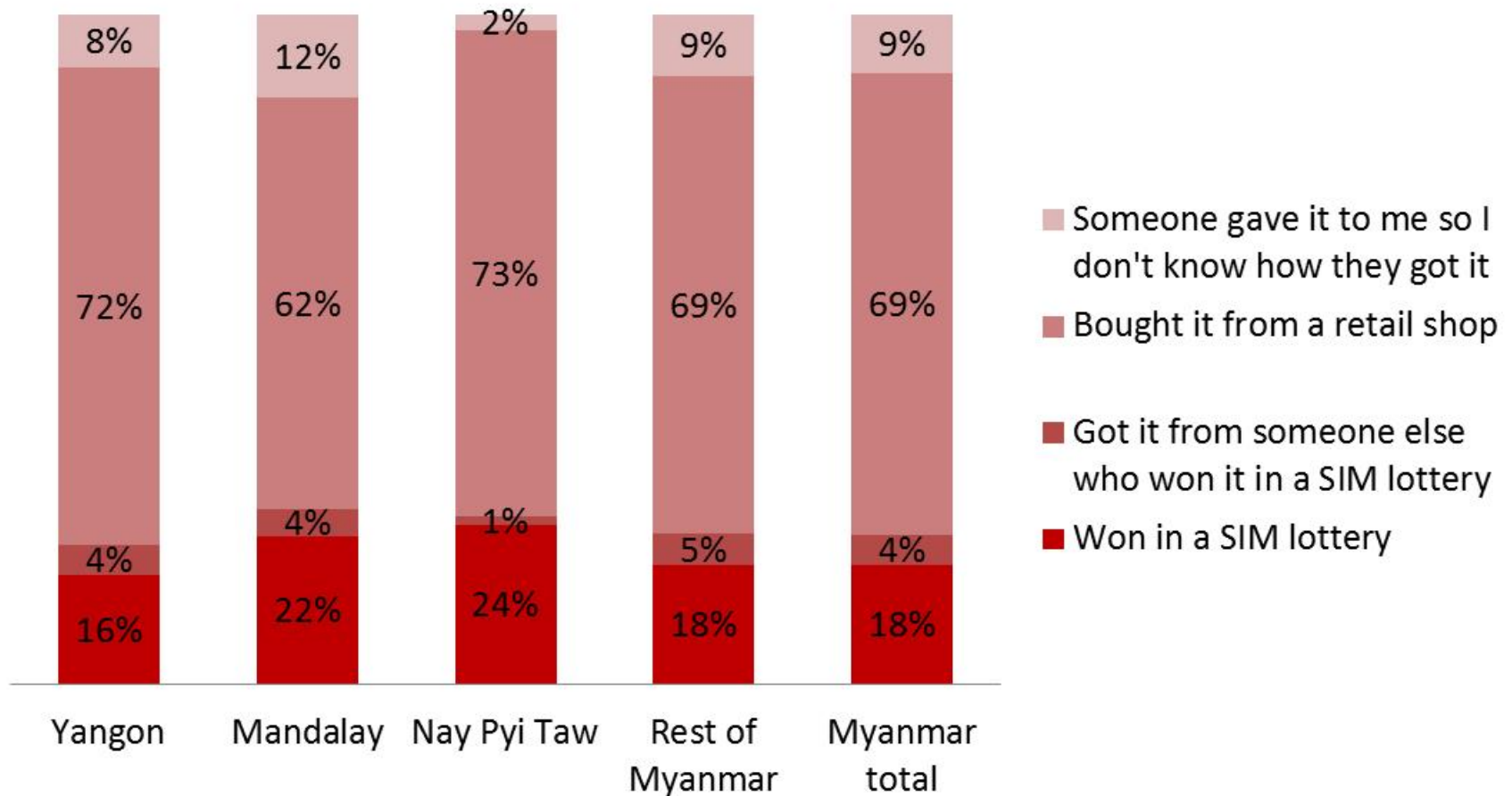
Number of active SIMs owned (% of mobile subscribers)



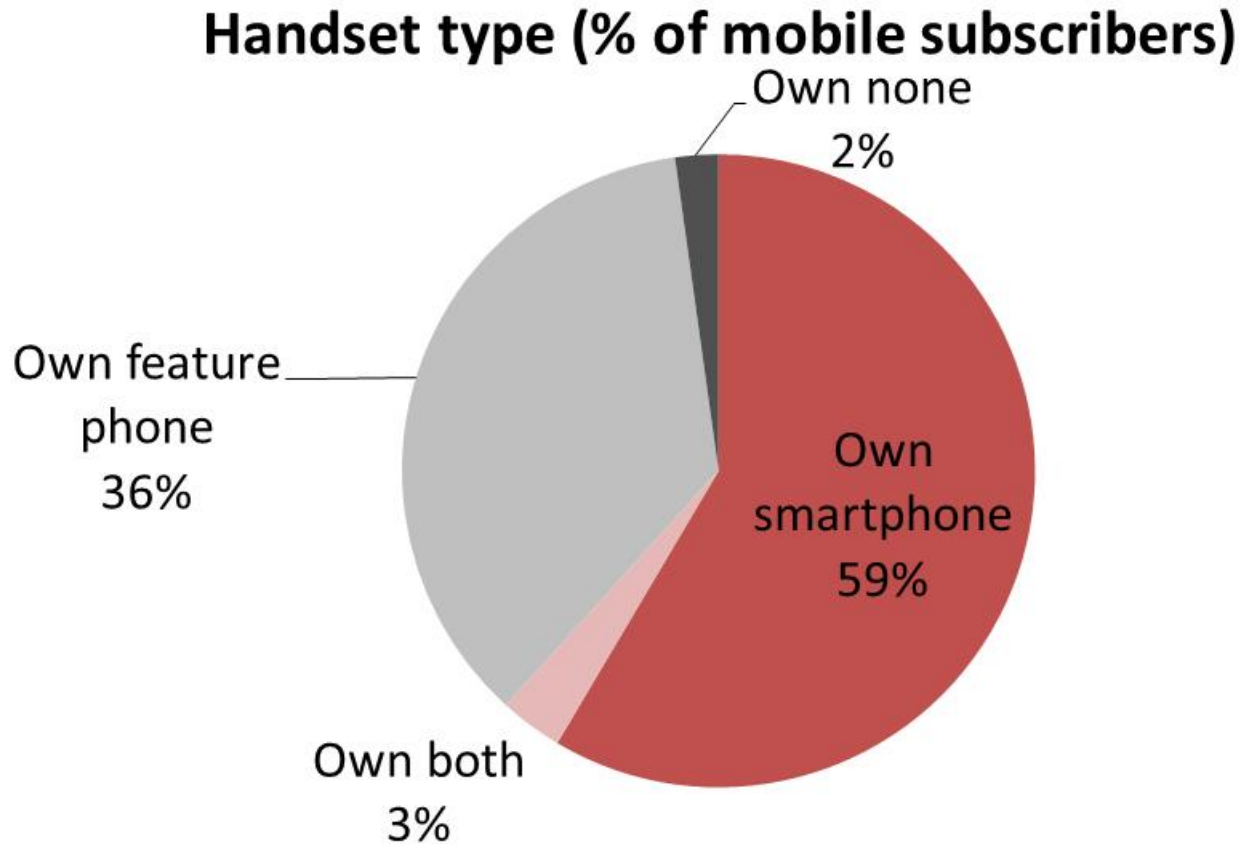
	Urban	Rural	Myanmar total
More than 1 SIM	17%	8%	13%

# 18% of subscribers' primary connection was obtained via lottery. Majority bought in a shop

How primary SIM card was obtained (% of mobile owners)



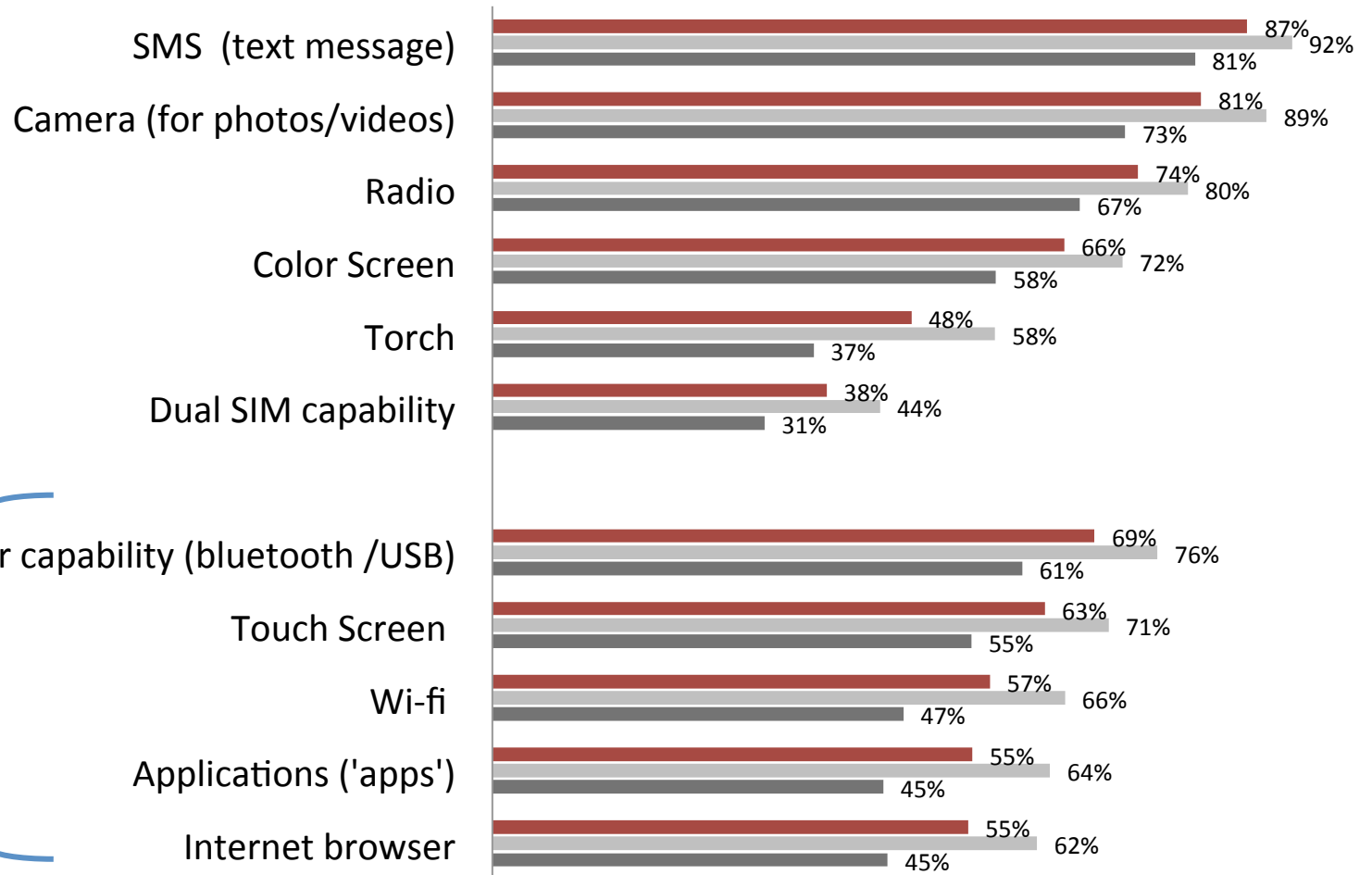
# Smartphones dominate



# ...with internet-ready features

Handset features (% of mobile subscribers)

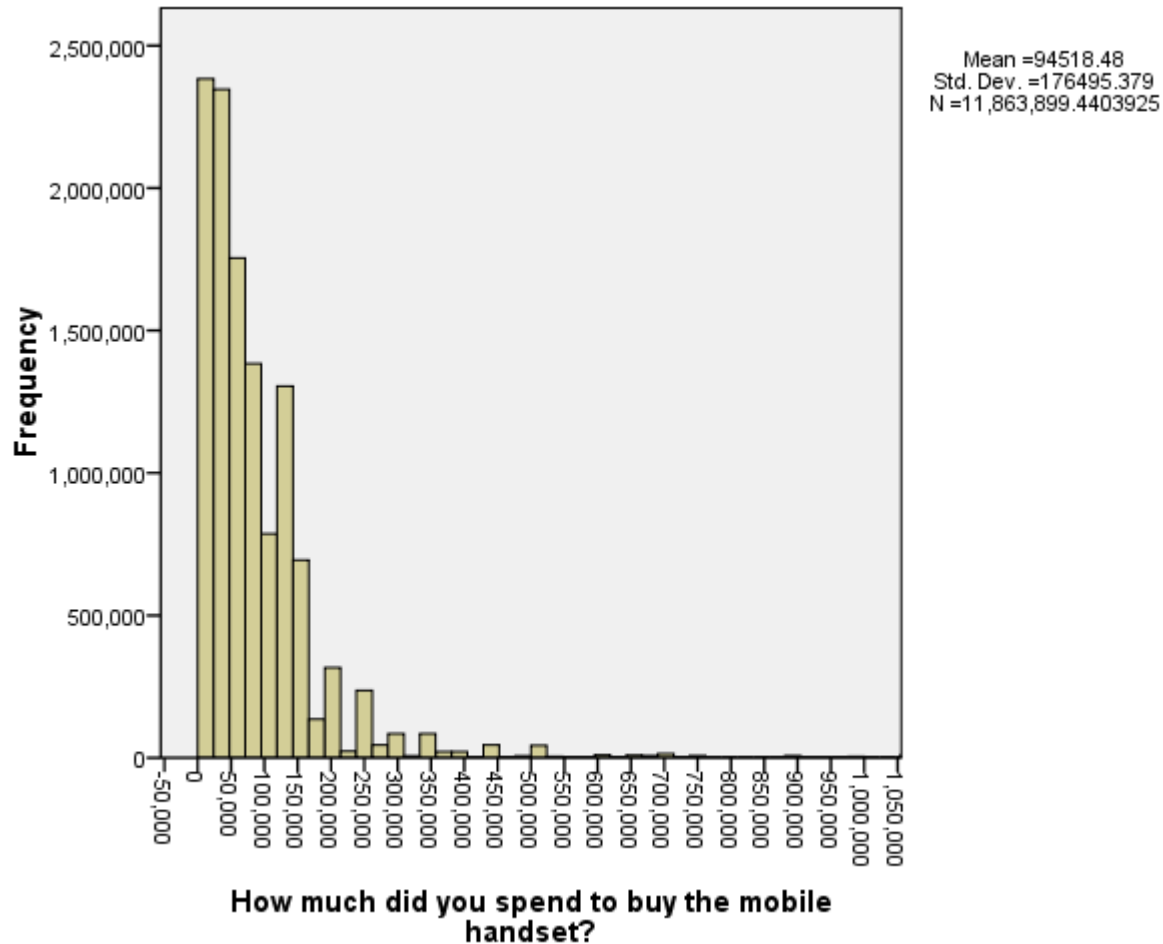
■ Myanmar total ■ Urban ■ Rural



Internet experience-related

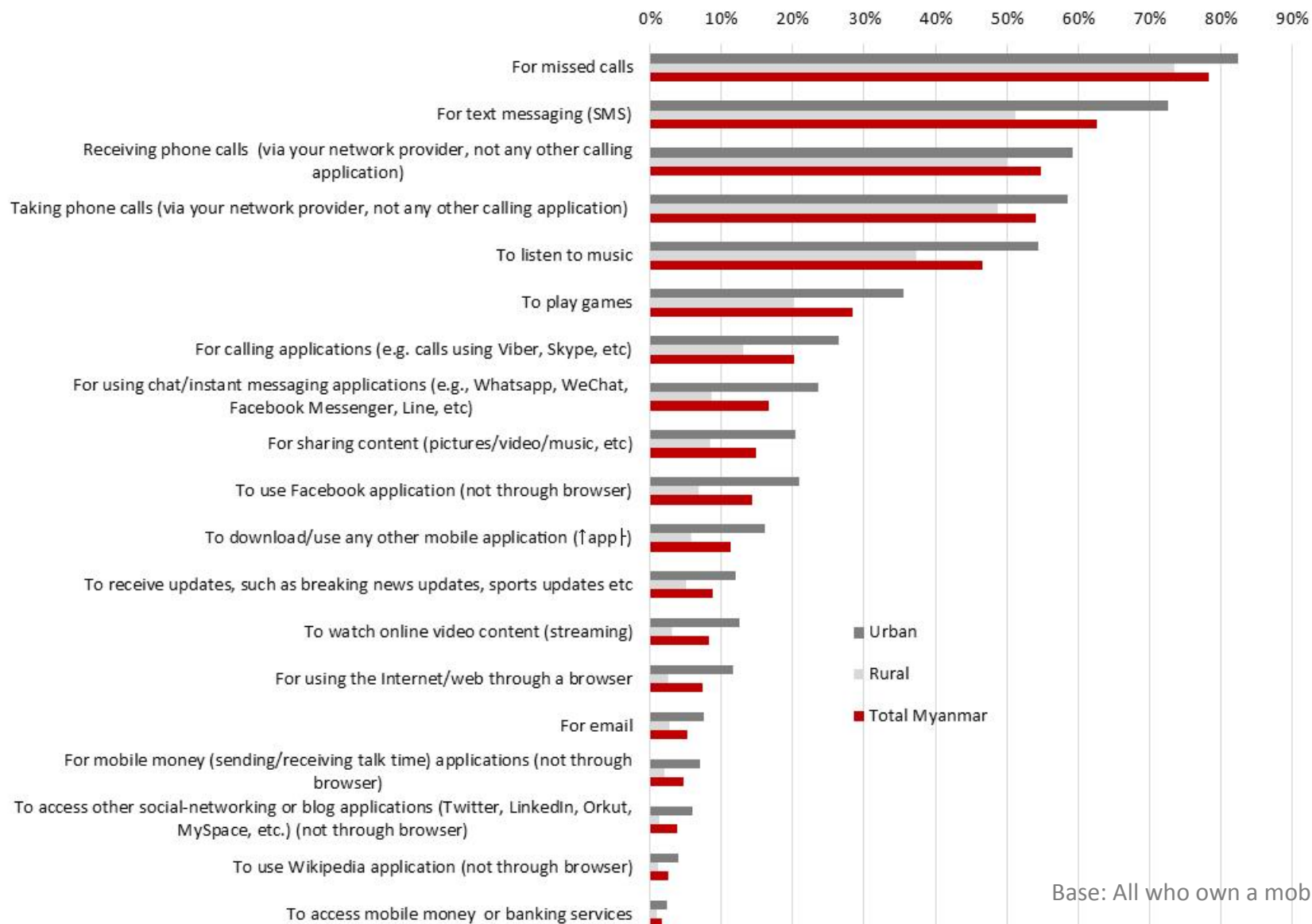
Base: Those who own a mobile handset

**Mean price paid for handset was MMK 94,500 (approx. USD87); 11% of owners got it free/as a gift**



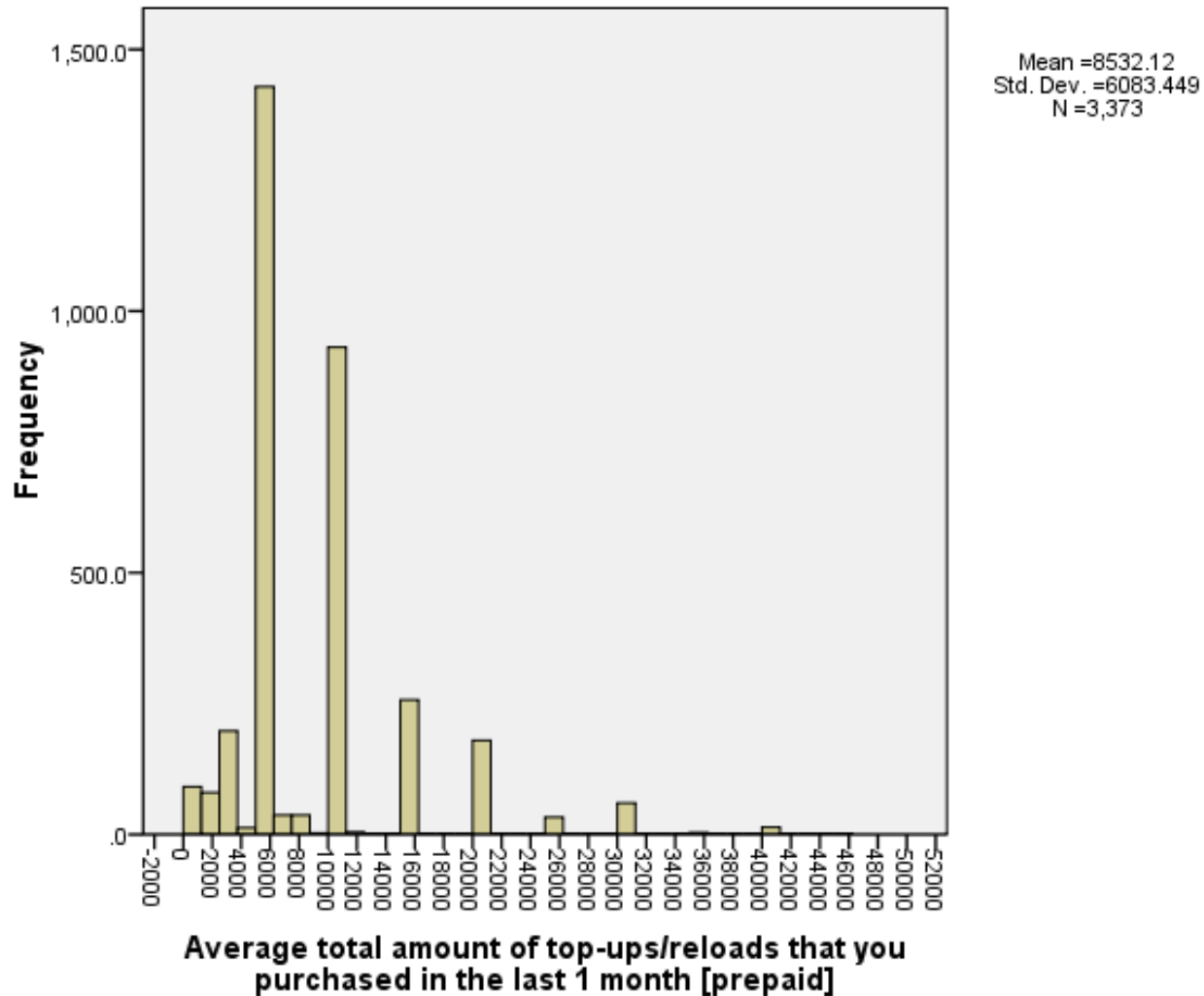
# Mobile for voice, SMS, missed calls, music, games

What they do with their mobile (% of mobile subscribers)



Base: All who own a mobile phone

# Monthly spend on top-ups MMK5,000 (USD5) on average





Baseline survey findings

# **COMPUTER AND INTERNET USE**

# Computer and Internet (via browser) use very low

Have you used a computer from any location in the last 12 months? This can include a desktop, laptop or tablet (tab) computer

	% 15-65 year olds
Yes	2%
Can't remember when, but I have used one before	1%
No	90%
Don't know what a computer is	7%

Have you used the Internet through a browser (e.g., UC Browser, Opera, , Chrome, Mozilla Firefox, Dolphin, Internet Explorer etc.) on a tab, computer or mobile phone in the last 12 months

	% 15-65 year olds
Yes	2%
Can't remember when, but I have used one before	0%
No	92%
I haven't heard of internet	6%

Small base (approx. 200), but all of these users are mobile subscribers; almost 75% of this use is via a mobile Internet browser; more than half use it at least once a day; most frequent use is for Facebook (75%).

Base : All respondents

# Test-bed for attractiveness of Zero-Rated content

Does your mobile service provider provide any 'free' content through your mobile service plan?

	Urban	Rural	Total Myanmar
Wiki-zero	1%	0%	1%
Facebook-zero	7%	4%	6%
certain music/songs/ring tones I can listen to/	16%	0%	15%
certain pictures/video I can download/view for free	29%	0%	27%
other types of content: [Please specify]	0%	0%	0%
Base : All mobile owners			

Do you use any of these applications/services?

	Urban	Rural	Total Myanmar
Wiki-zero	7%	10%	7%
Facebook-zero	17%	21%	18%
Certain music/songs/ring tones I can listen to/	22%	0%	21%
Certain pictures/video I can download/view for free	52%	0%	47%
Other types of content: [Please specify]	0%	0%	0%
Base: Those who received any free content			

# What does 'I use the internet' mean in Myanmar?

Have you used the Internet through a browser (e.g., UC Browser, Opera, , Chrome, Mozilla Firefox, Dolphin, Internet Explorer etc.) on a tab, computer or mobile phone in the last 12 months

	% 15-65 year olds
Yes	2%
Can't remember when, but I have used one before	0%
No	92%
I haven't heard of internet	6%

Small base (approx. 200), but all of these users are mobile subscribers; almost 75% of this use is via a mobile Internet browser; more than half use it at least once a day; most frequent use is for Facebook (75%).

Do you use any of these applications/services?

	Urban	Rural	Total Myanmar
Wiki-zero	7%	10%	7%
Facebook-zero	17%	21%	18%
Certain music/songs/ring tones I can listen to/	22%	0%	21%
Certain pictures/video I can download/view for free	52%	0%	47%
Other types of content: [Please specify]	0%	0%	0%
Base: Those who received any free content			

Baseline survey findings

# **NON-SUBSCRIBERS**

# Affordability and perceived low utility are most common reasons for not getting a mobile phone

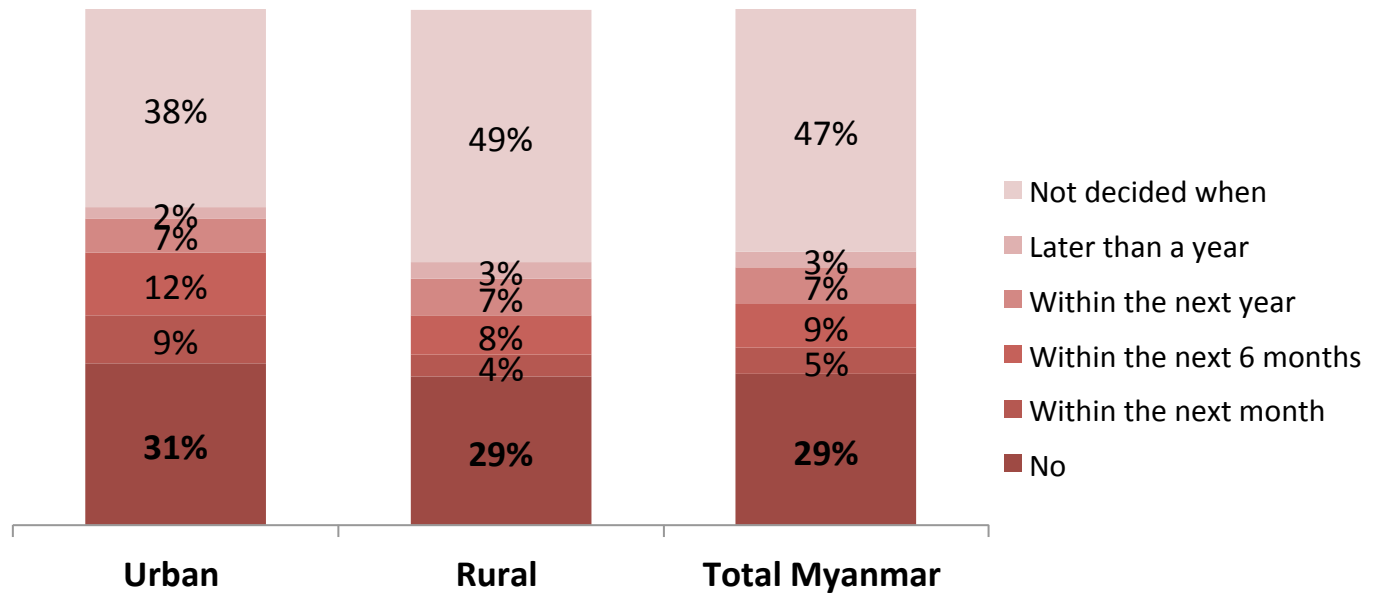
Why don't you have a mobile phone connection? (% of teleusers who don't own a handset or active SIM)

	Urban	Rural	Myanmar Total
I cannot afford a handset	32%	41%	40%
I have no use for it / don't need one	39%	28%	30%
No mobile coverage where I live	2%	10%	8%
I don't know how to use a mobile/too complicated	7%	7%	7%
I cannot afford a SIM card	1%	2%	2%
My phone is broken	6%	2%	3%
No electricity where I live to charge the mobile phone	0%	2%	1%
My phone got stolen	4%	1%	1%
Other	10%	7%	8%

Base : Those who have used a phone before, but don't own a handset or an active SIM card

# About 50% expect to purchase in the coming year

Do you plan to get a mobile phone in the future?



Base : Own neither mobile handset nor an active sim card

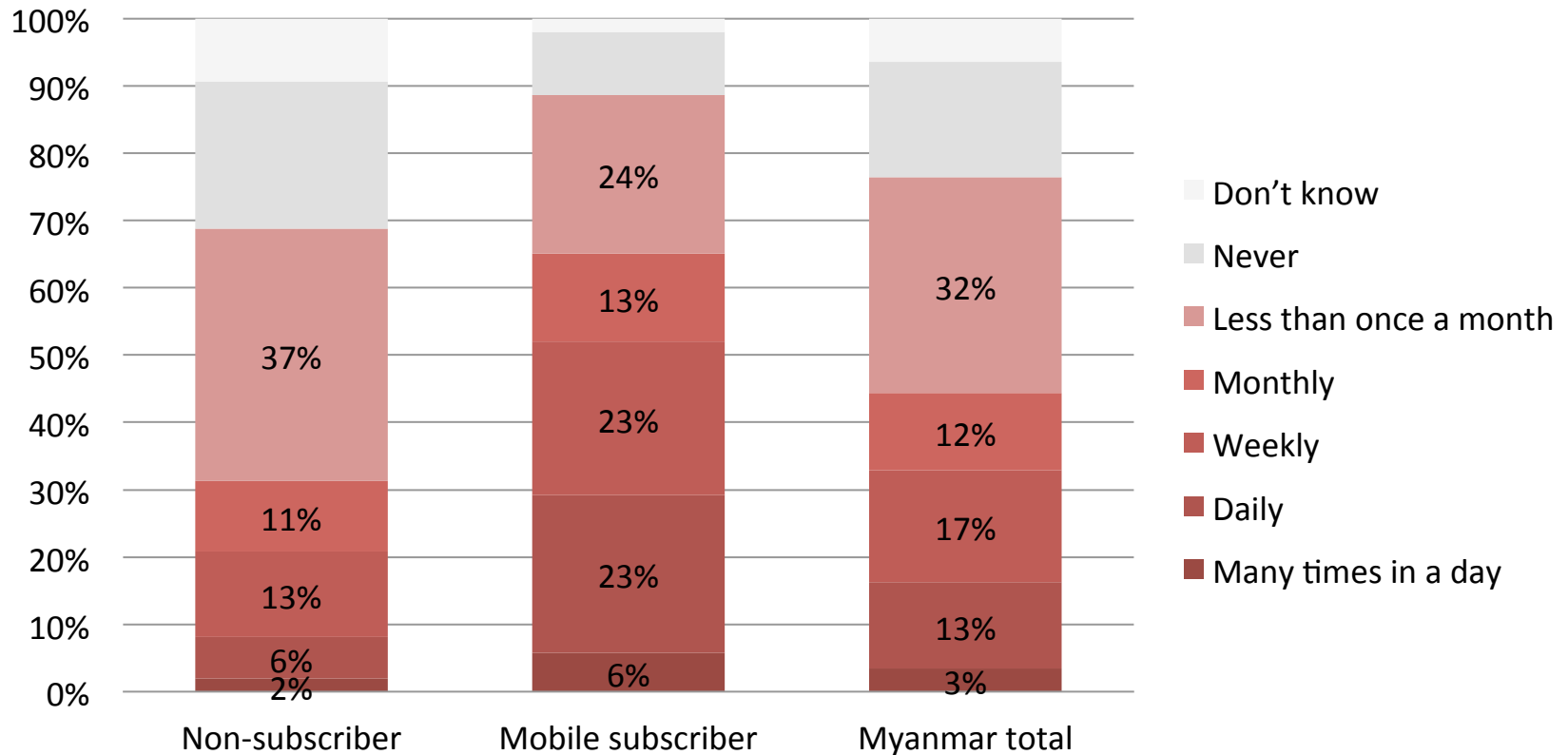
Baseline survey findings

# **COMMUNICATION HABITS AND NEEDS**



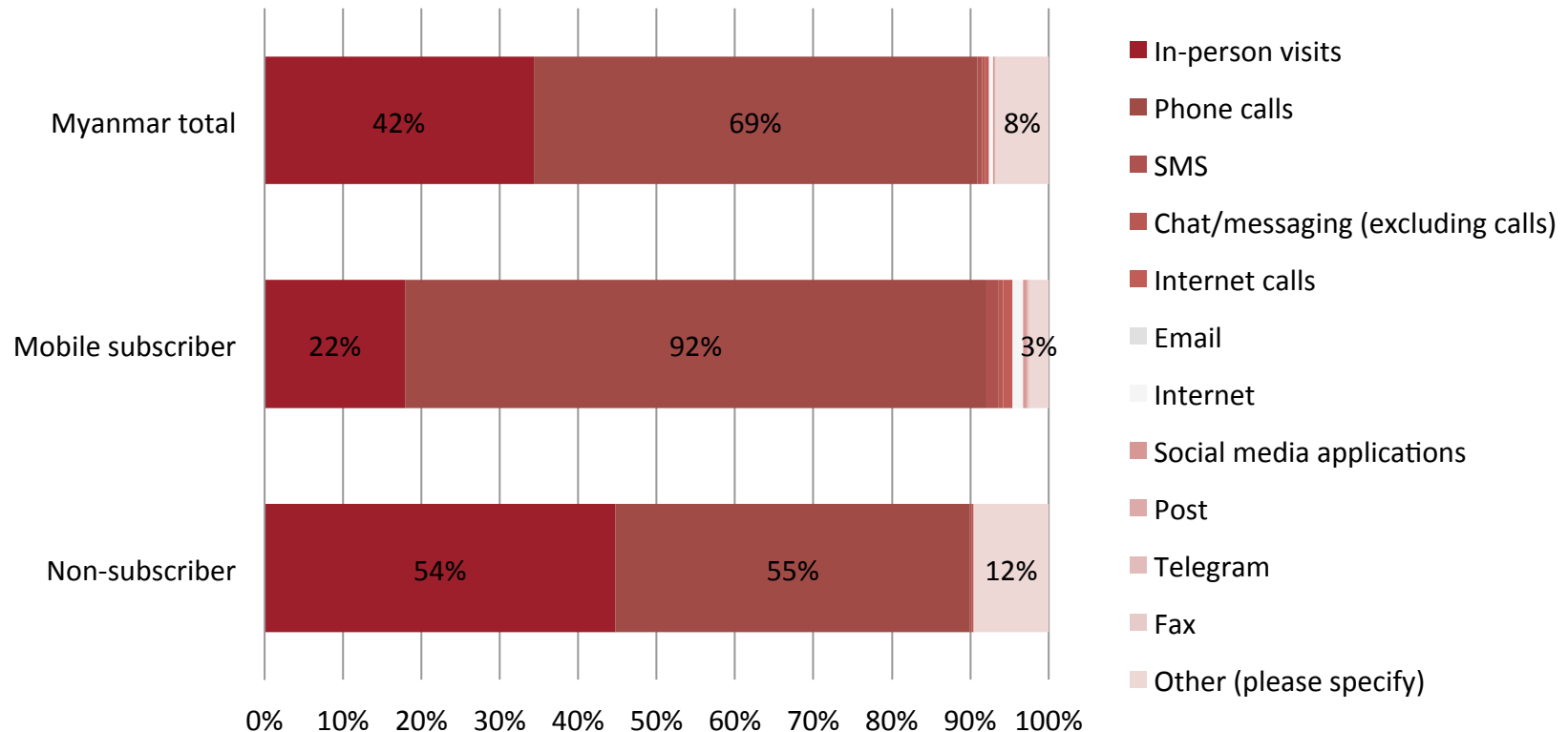
# Most have some need to communicate with those outside their town/village

Frequency of communication with people outside of own town/village  
(% of 15-65 year olds)



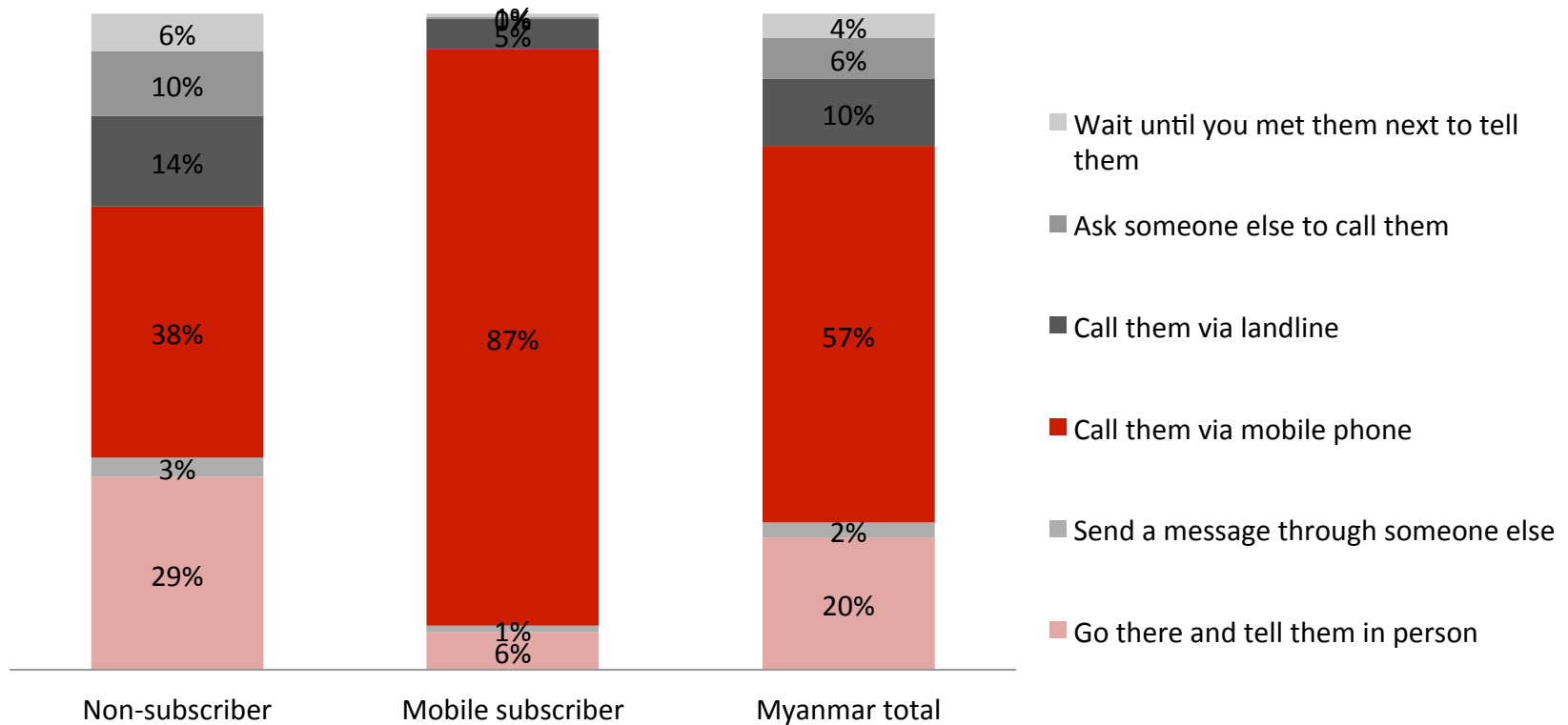
# Most communication outside the town/village by in-person visits or phone calls; in person visits more common among non-subscribers

How respondent generally communicates with others outside their town/village  
(% of those that communicate with people outside town/village)



# Communication in an emergency: mobiles substitute for physical travel

How respondent would communicate an urgent message to someone outside of town/village (% of 15-65 year olds)

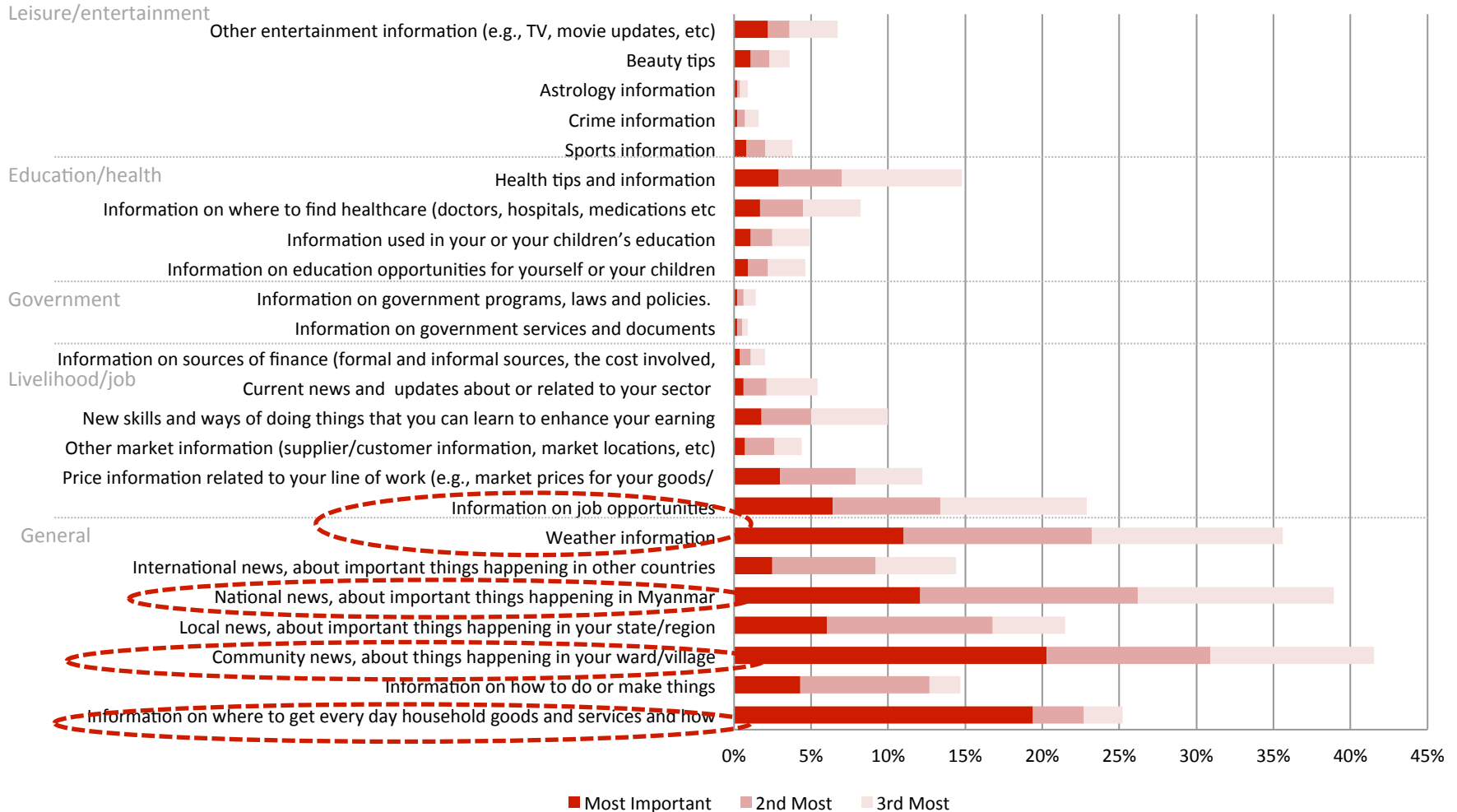


Baseline survey findings

# **INFORMATION NEEDS**

# Information needs: Thirst for news (national & community), where to obtain daily goods/ services, weather, jobs

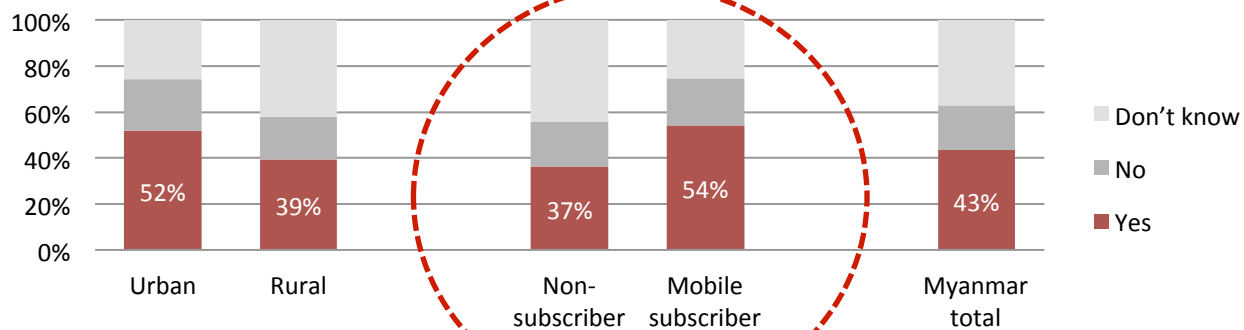
Day-to-day information needs (% of rural 15-65 year olds)



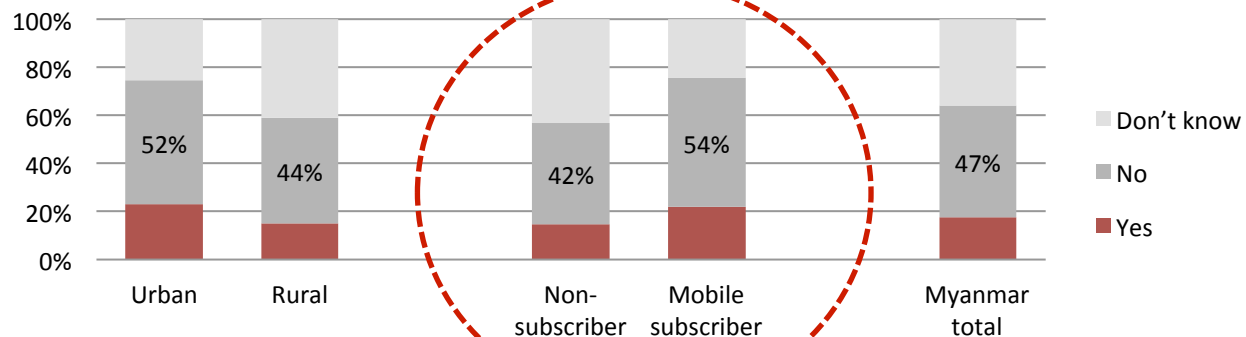
Base: All respondents

# Compared to non-subscribers, mobile subscribers are 'hungrier' for information – want more, faster than currently available

Do you think that you require more information than you currently have access to? (% of 15-65 year olds)



Do you think that you receive information on this kind of information quickly enough? (% of 15-65 year olds)



**GOING FORWARD**

# Upcoming research (2015 and 2016)

- Qualitative study of MEs
  - Panel study of 2014 respondents
- End-line survey to assess socioeconomic impact of mobile (if any)
  - Possible variables where changes can be seen:
    - Speed of information travel
    - Quantity of information available
    - Prices of good
    - Mix of physical visits vs. phone calls for given purpose



# **FURTHER DETAILS**

[www.lirneasia.net](http://www.lirneasia.net)

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