

Myanmar: Contributions to connecting the next billion

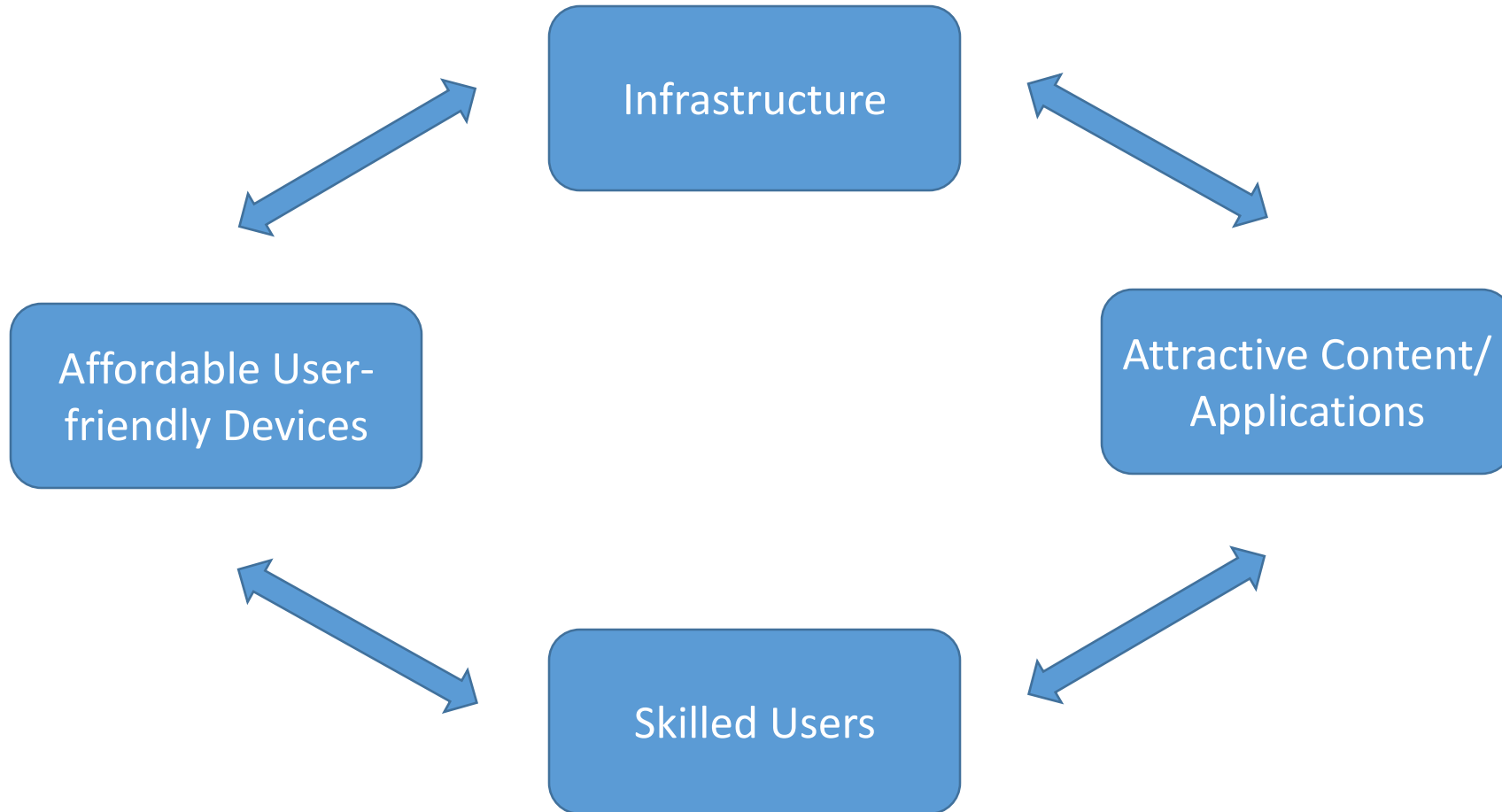
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Internet Ecosystem



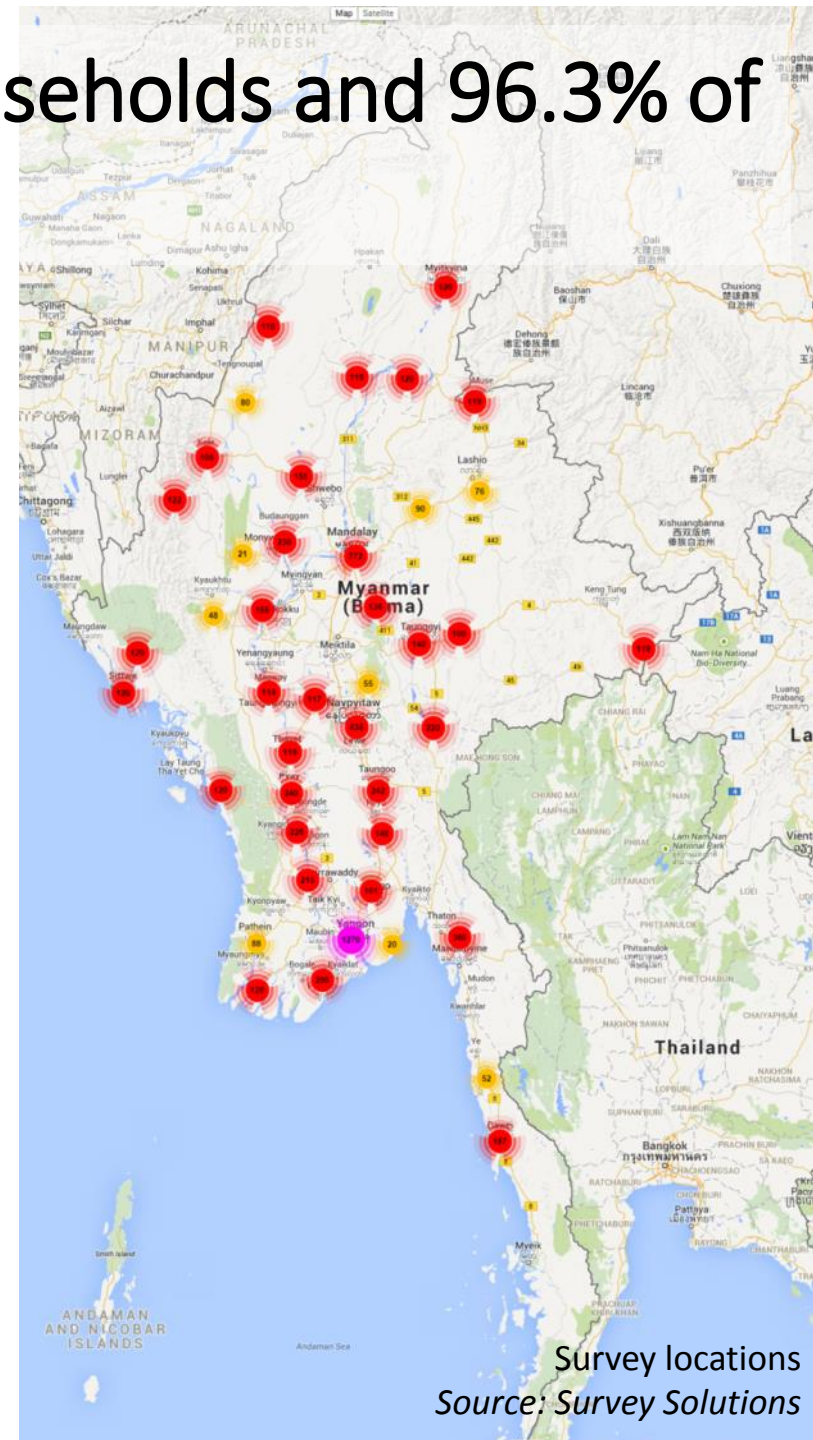
LIRNEasia-MIDO working on all fronts²

But, first we studied teleuse

- In 2014, before rollout accelerated, we studied teleuse by urban, poor micro-entrepreneurs
- In 2015 February-March, a nationwide baseline quantitative teleuse study that included interviews with government officials closest to the citizens
- In July 2015 extensive gender-focused qualitative studies in multiple locations in Myanmar
- Plan to do another nationwide study in 2016

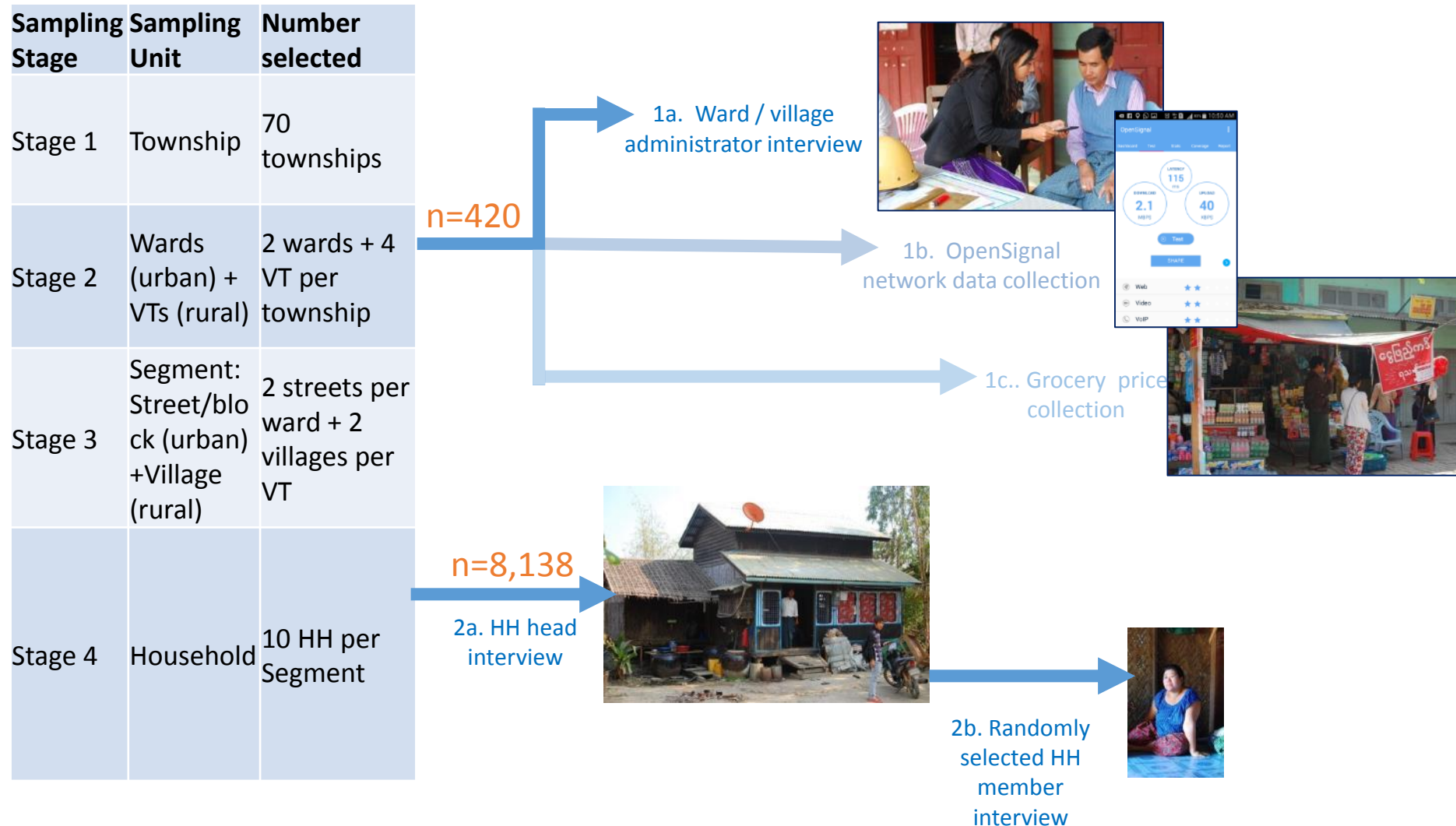
Representative of 97% of households and 96.3% of population aged 15 - 65

- At 2.5% 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
 - 32 townships excluded due to security concerns
- 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 at: <http://lirneasia.net/wp-content/uploads/2015/07/LA-MM-baseline-methodology-note.pdf>



Survey locations
Source: Survey Solutions

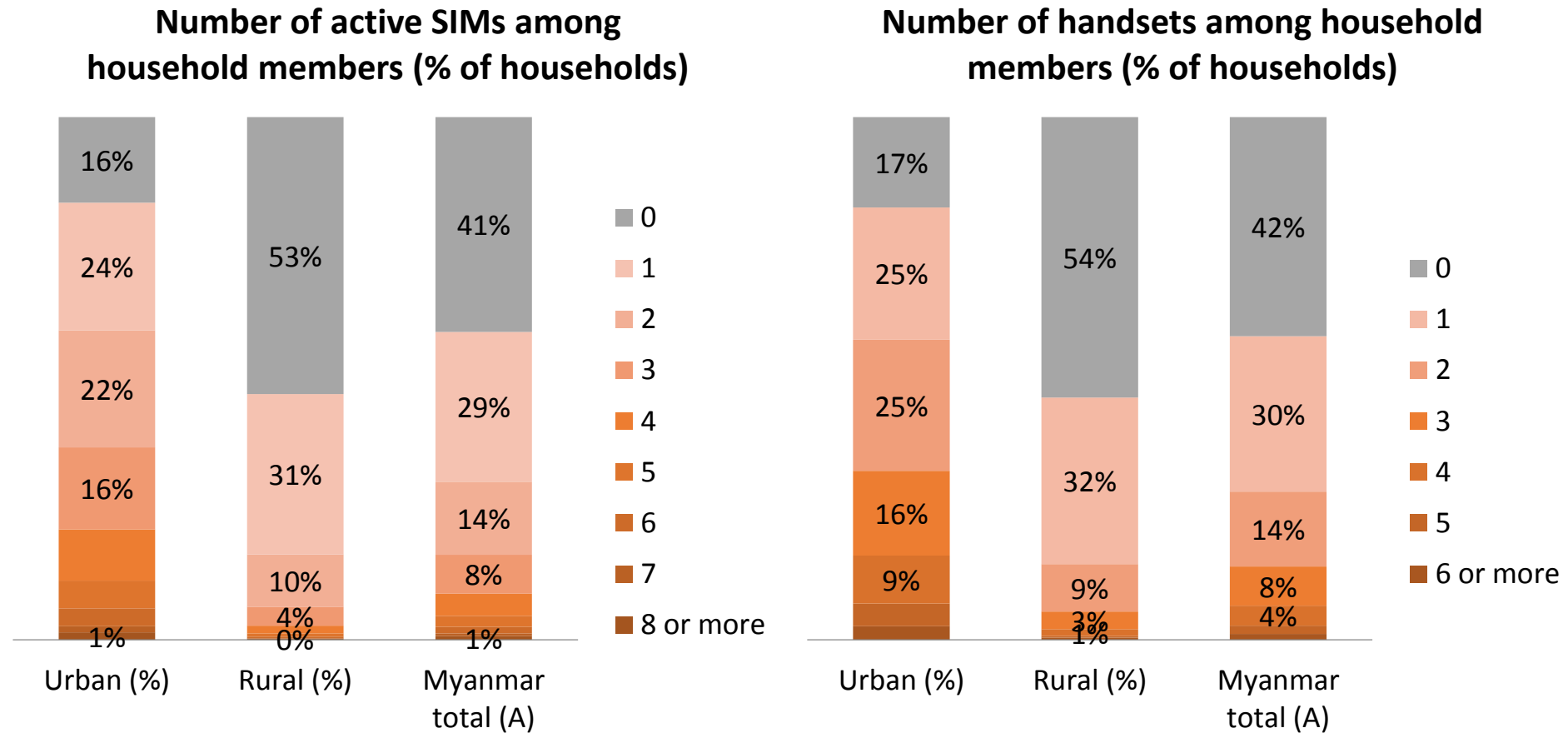
Data collection at multiple levels



More than 90% of wards/villages within signal coverage. Reload possible in 70%. Can purchase SIMs and handsets mostly in 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%

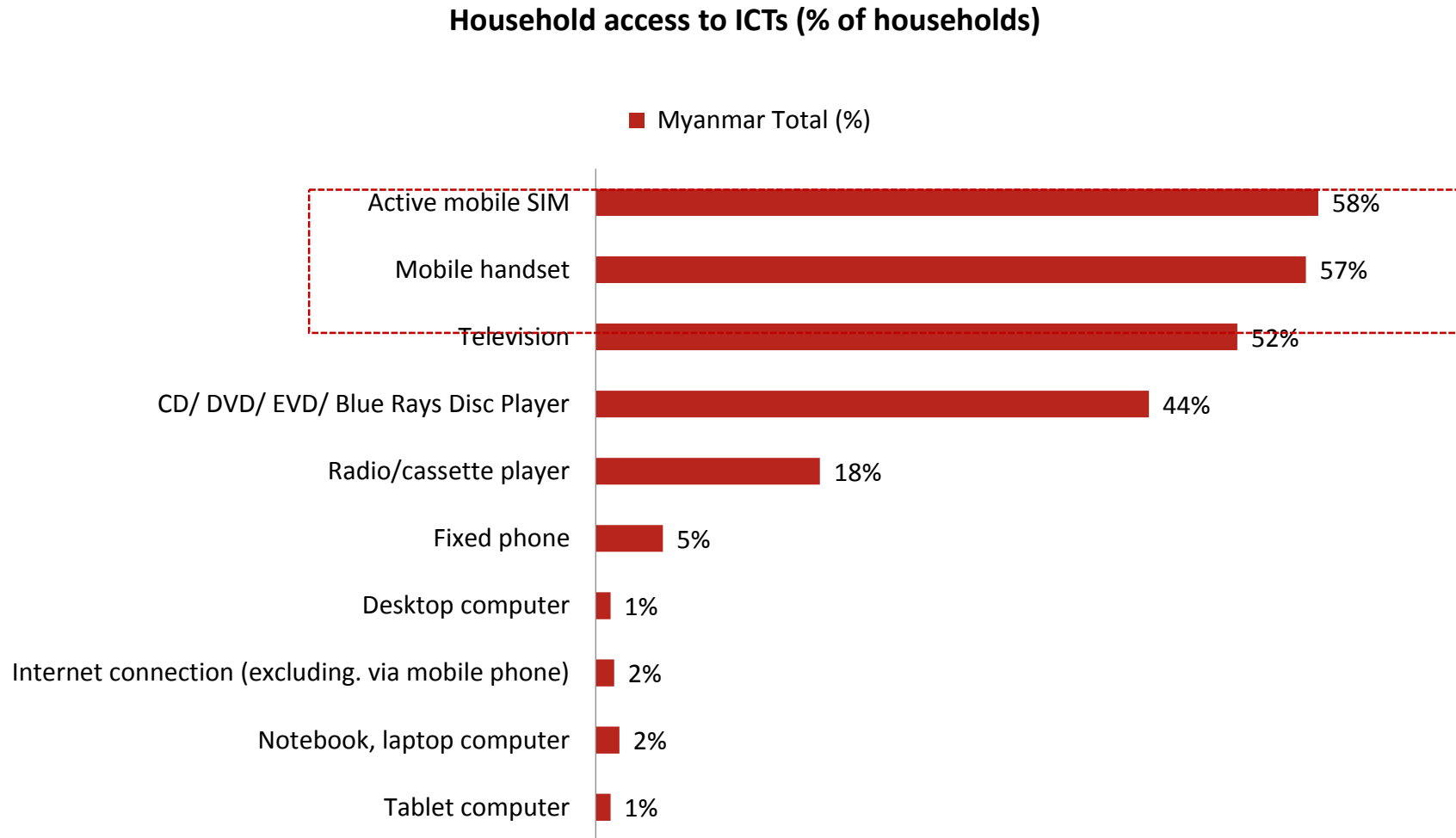
Almost 60% of households have at least one mobile phone; almost 30% have more than one



Q: How many active SIM cards do you have in total? (SIM cards that you have used in the last 30 days)

Q: How many number of functioning hand-sets do you own?

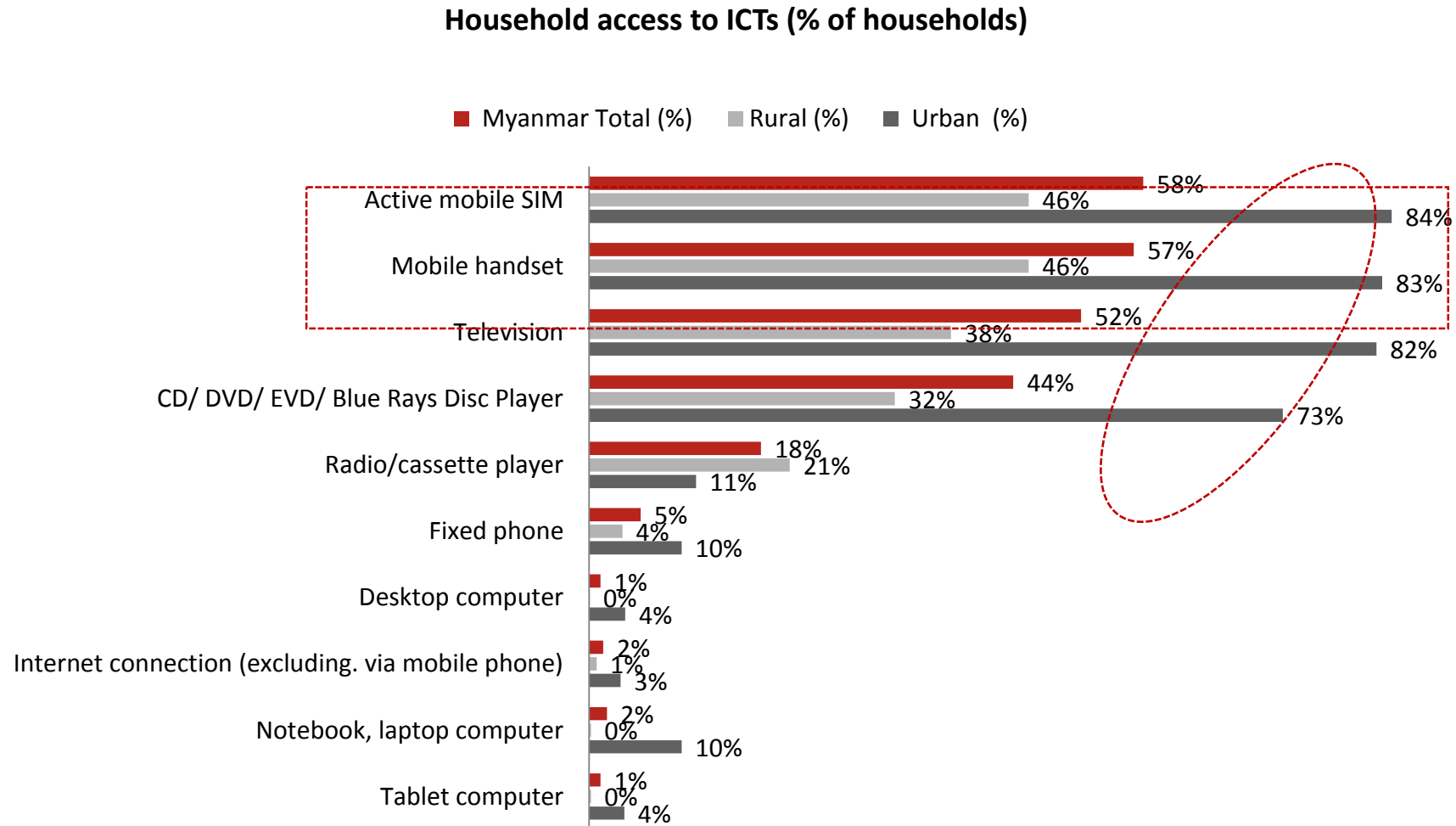
Mobile phones & SIMs are the most common of ICTs. Already ahead of TVs



Q: Does your household own working/ functioning [item]?

Base: All households

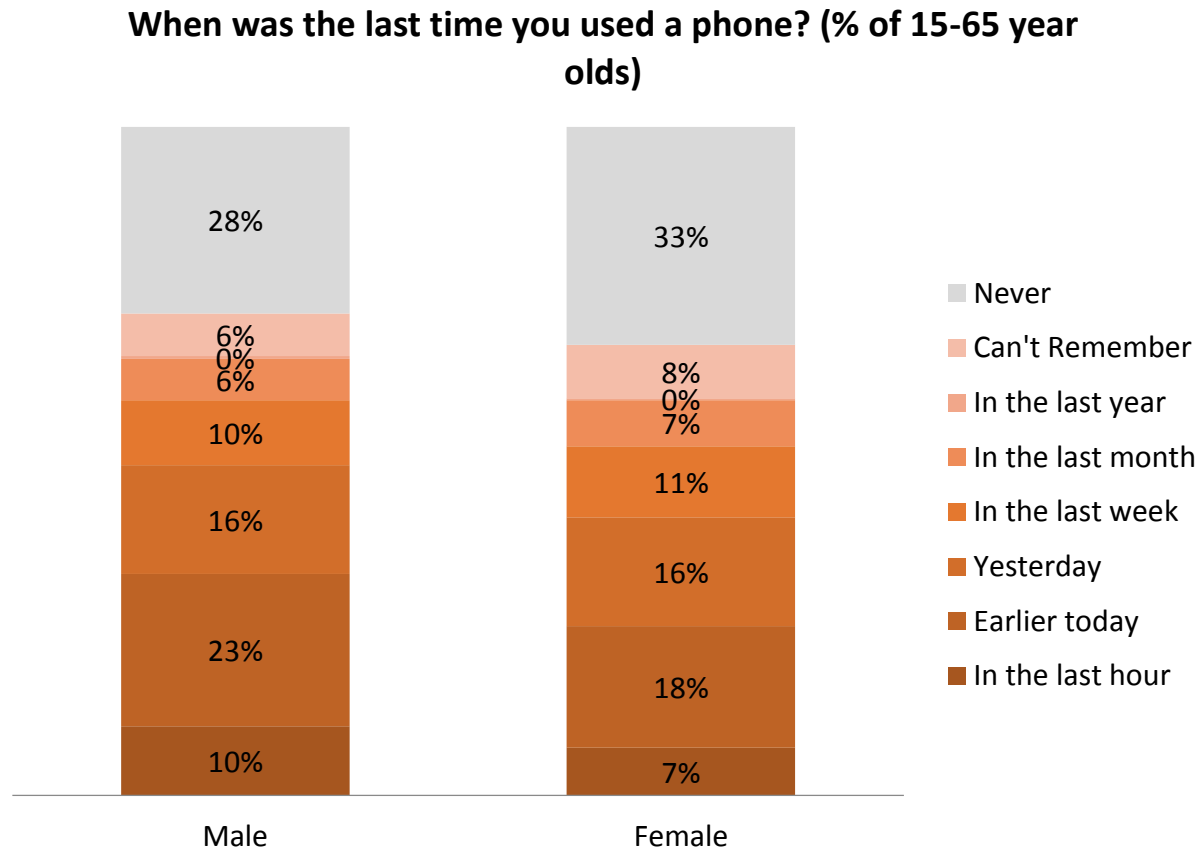
....but big urban-rural gap in phone, SIM, TV and CD/DVD ownership



Q: Does your household own working/ functioning [item]?

Base: All households

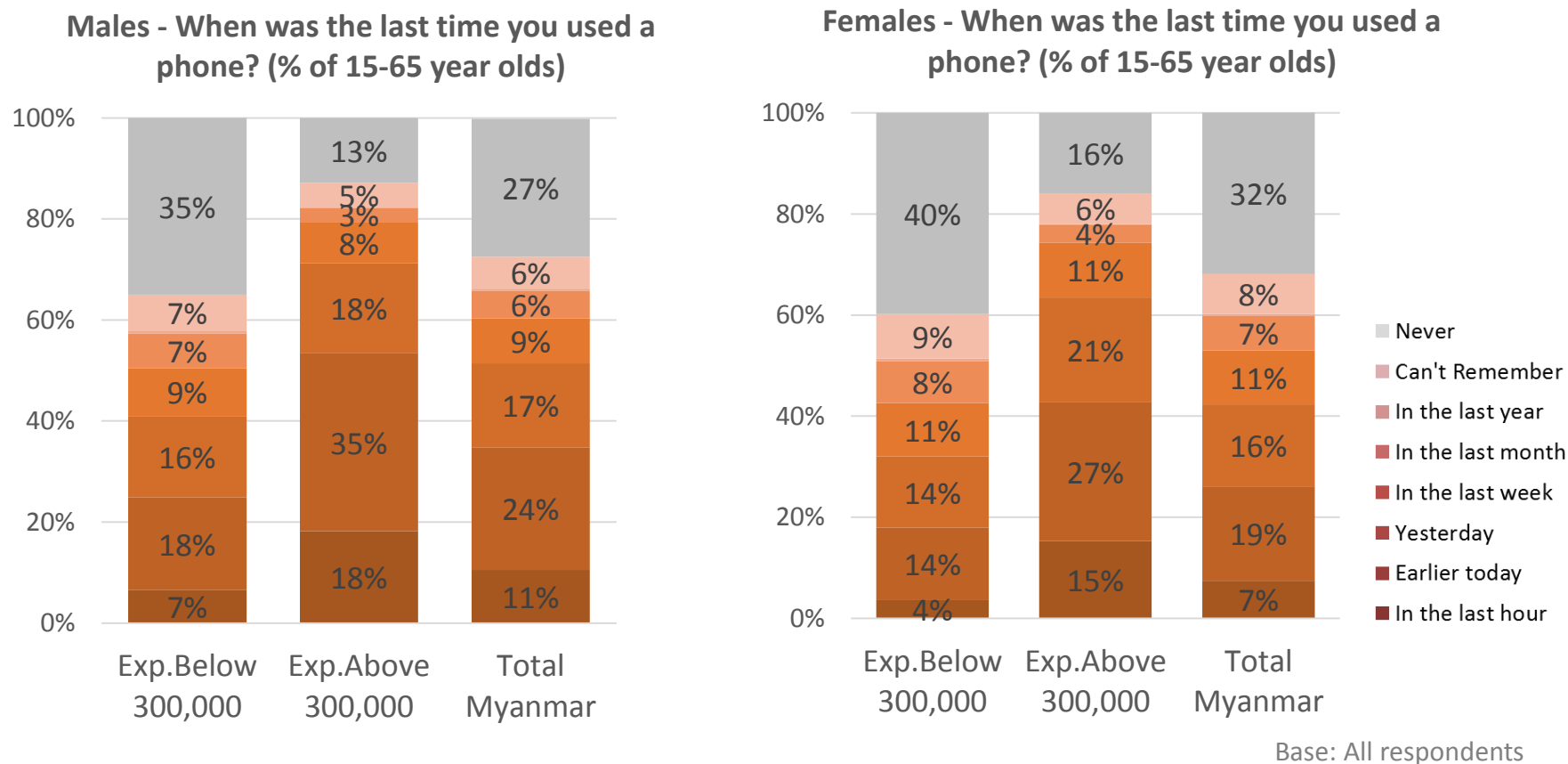
Gender difference is minimal: males are more frequent teleusers



Q: When did you last use a phone to take or receive a call? It could be through your own phone, a neighbors' phone, a friend's phone, communication kiosk/shop or any other. It also need not be paid for?

Base: Respondents who had ever used a phone before

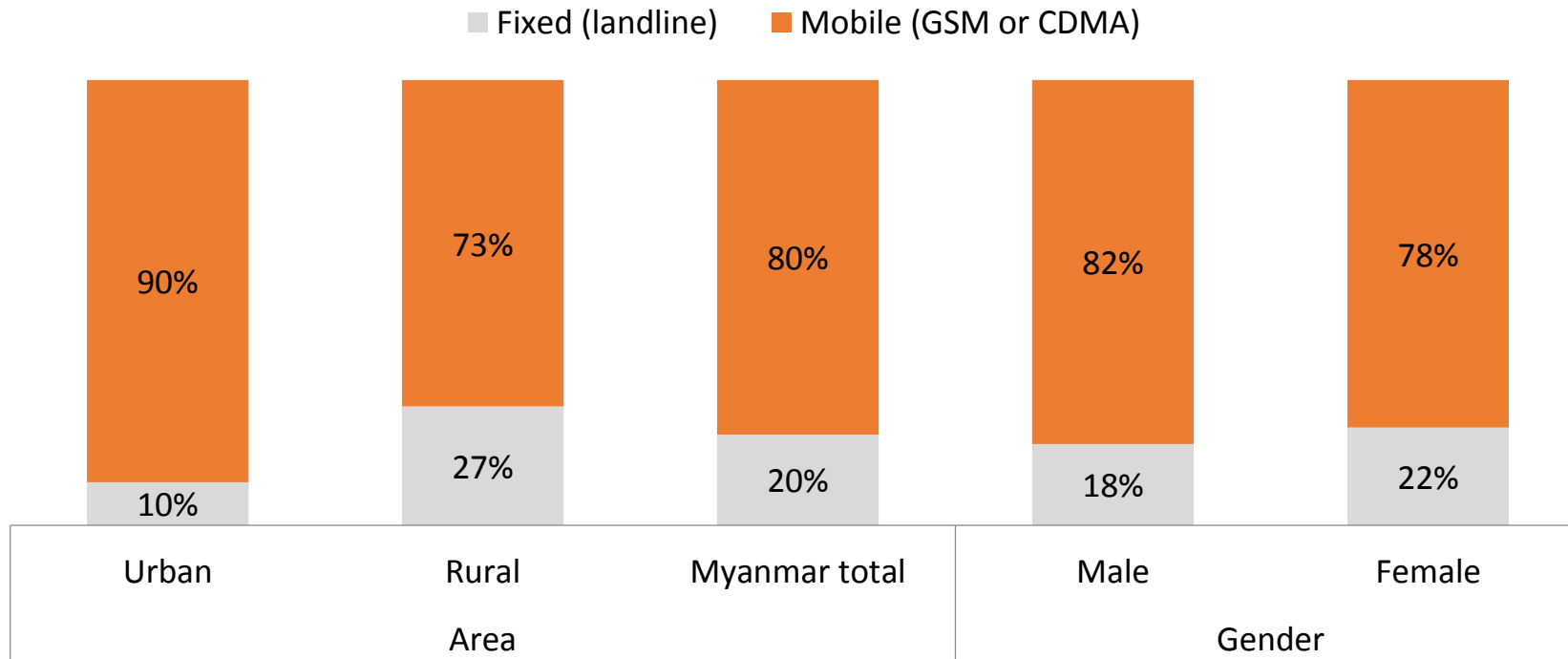
Income effects wash out gender: access by poor women similar to that by poor men



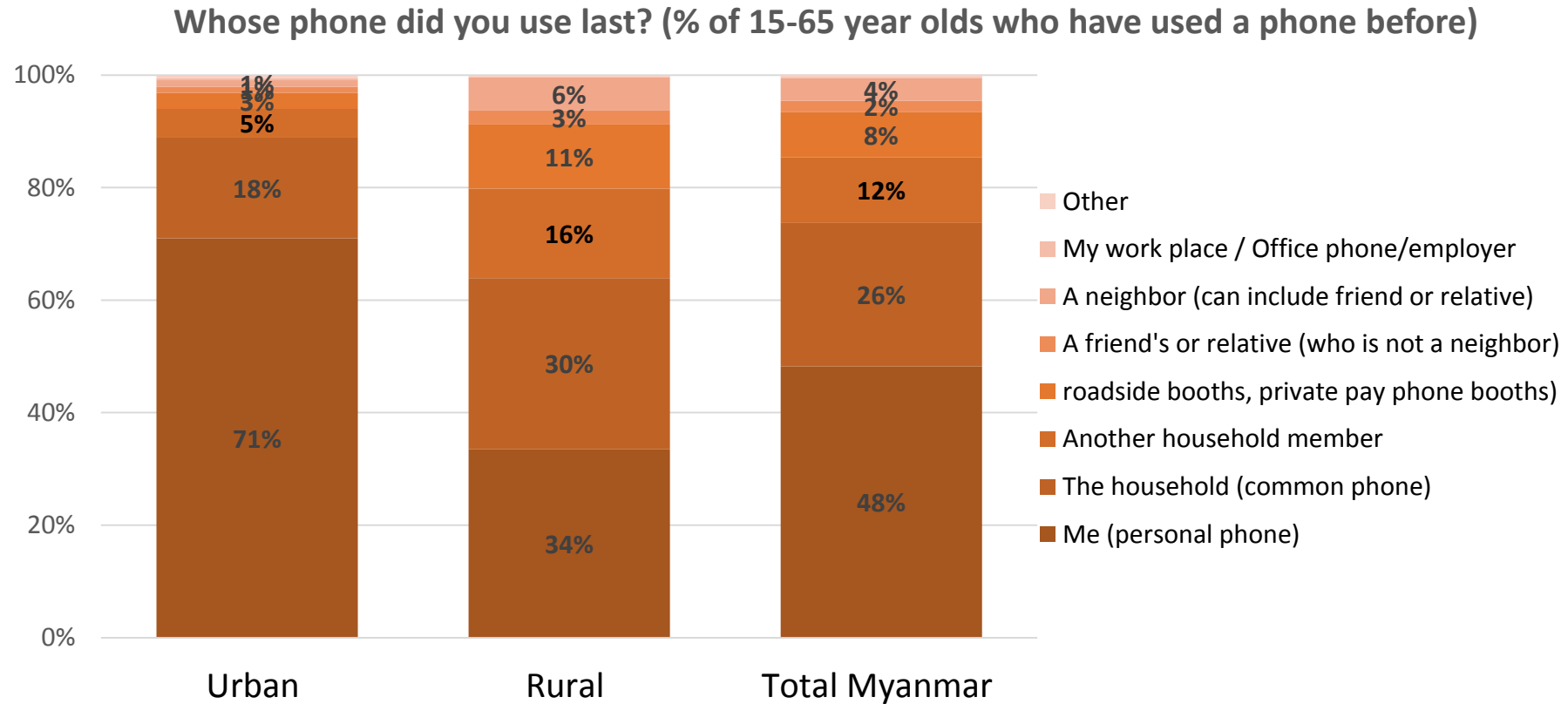
Q: When did you last use a phone to take or receive a call? It could be through your own phone, a neighbor's phone, a friend's phone, communication kiosk/shop or any other. It also need not be paid for?

80% of teleusers said the last phone they used was a mobile (not necessarily their own)

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



Most either used their own or another phone in the house. 80% rural teleusers have a phone in the house.

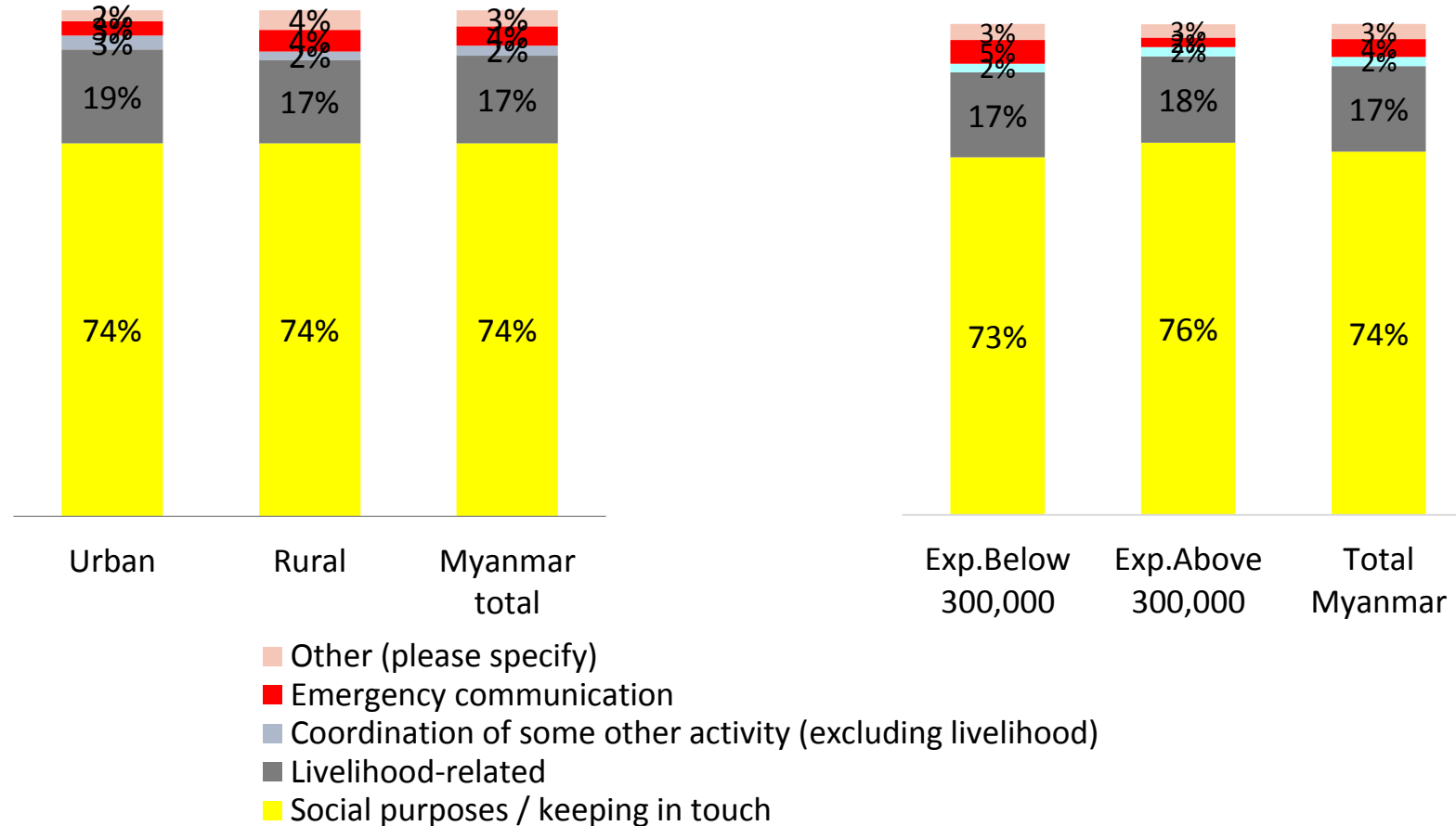


Q: What type of phone did you make or receive your last phone call from?

Base: Respondents who had ever used a phone before

Most calls serve social purposes, some are livelihood-related. No difference between urban/rural or rich/poor.

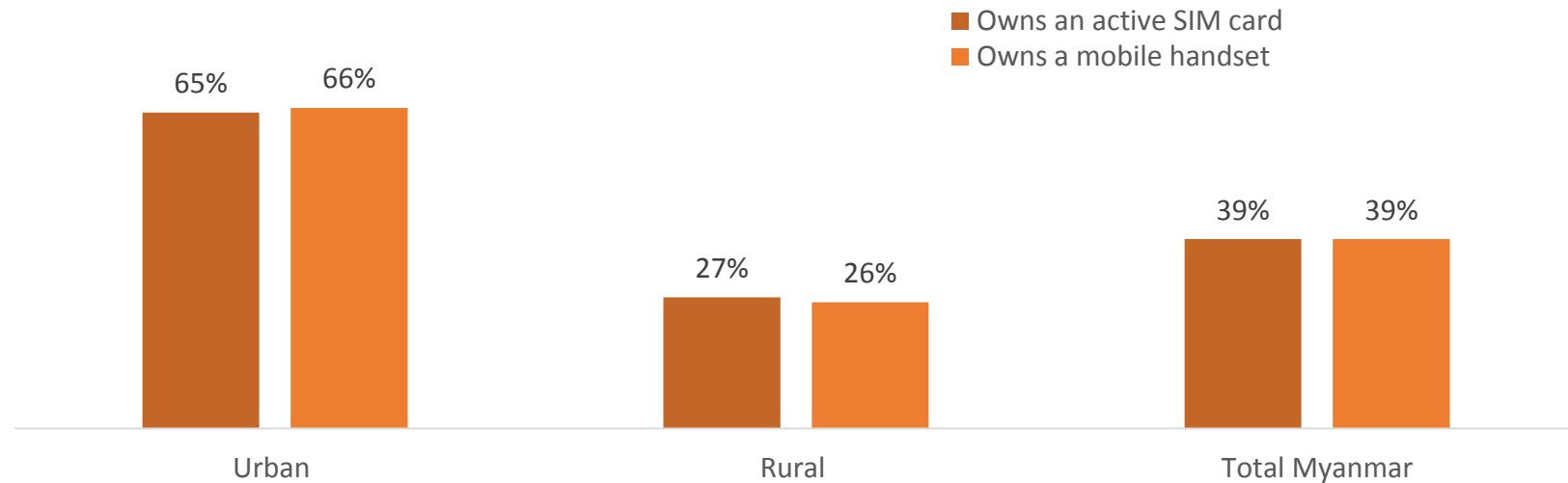
Purpose of the last call made or received (% of 15-65 year olds who have used a phone before)



Q: Can you tell us the purpose of your call?

39% Myanmar 15-65 population are mobile subscribers

Mobile SIM and handset ownership (% of 15-65 years)

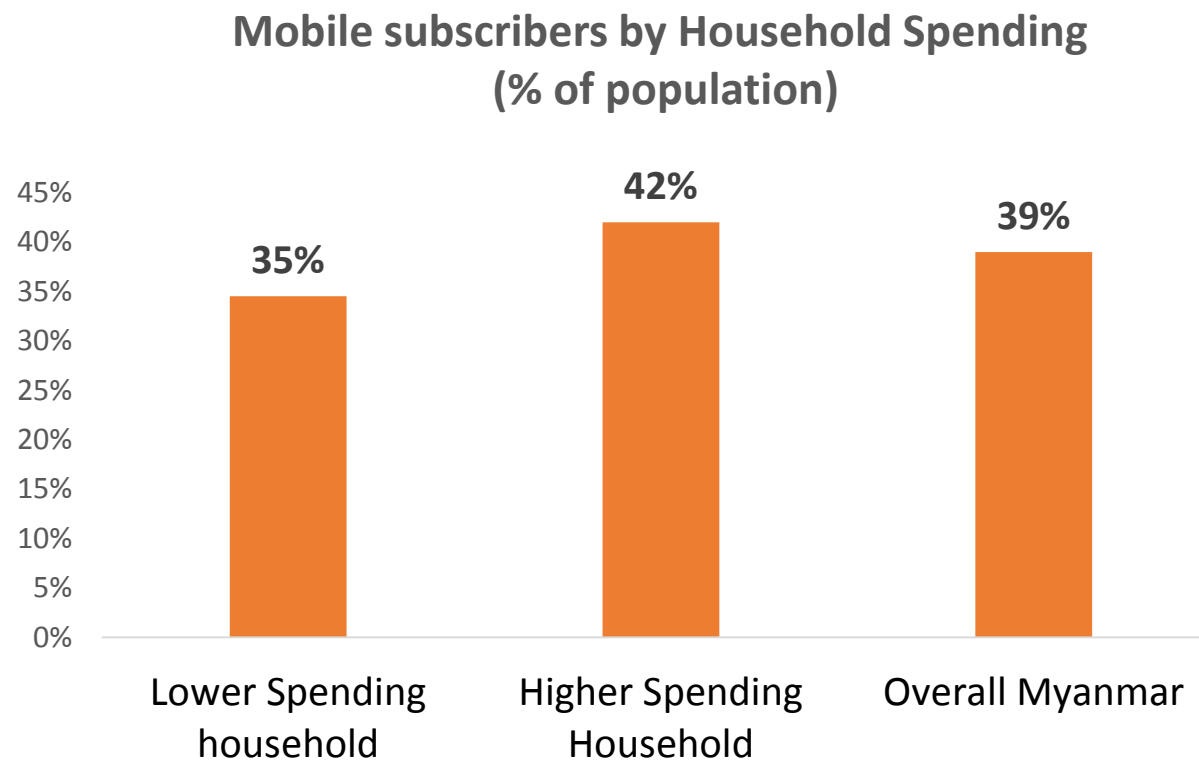


- City-wise SIM penetration:
 - Yangon-83%; Mandalay-55%; Nay Pyi Taw-55%

Q: Which describes your status of mobile phone ownership?

Base: All respondents

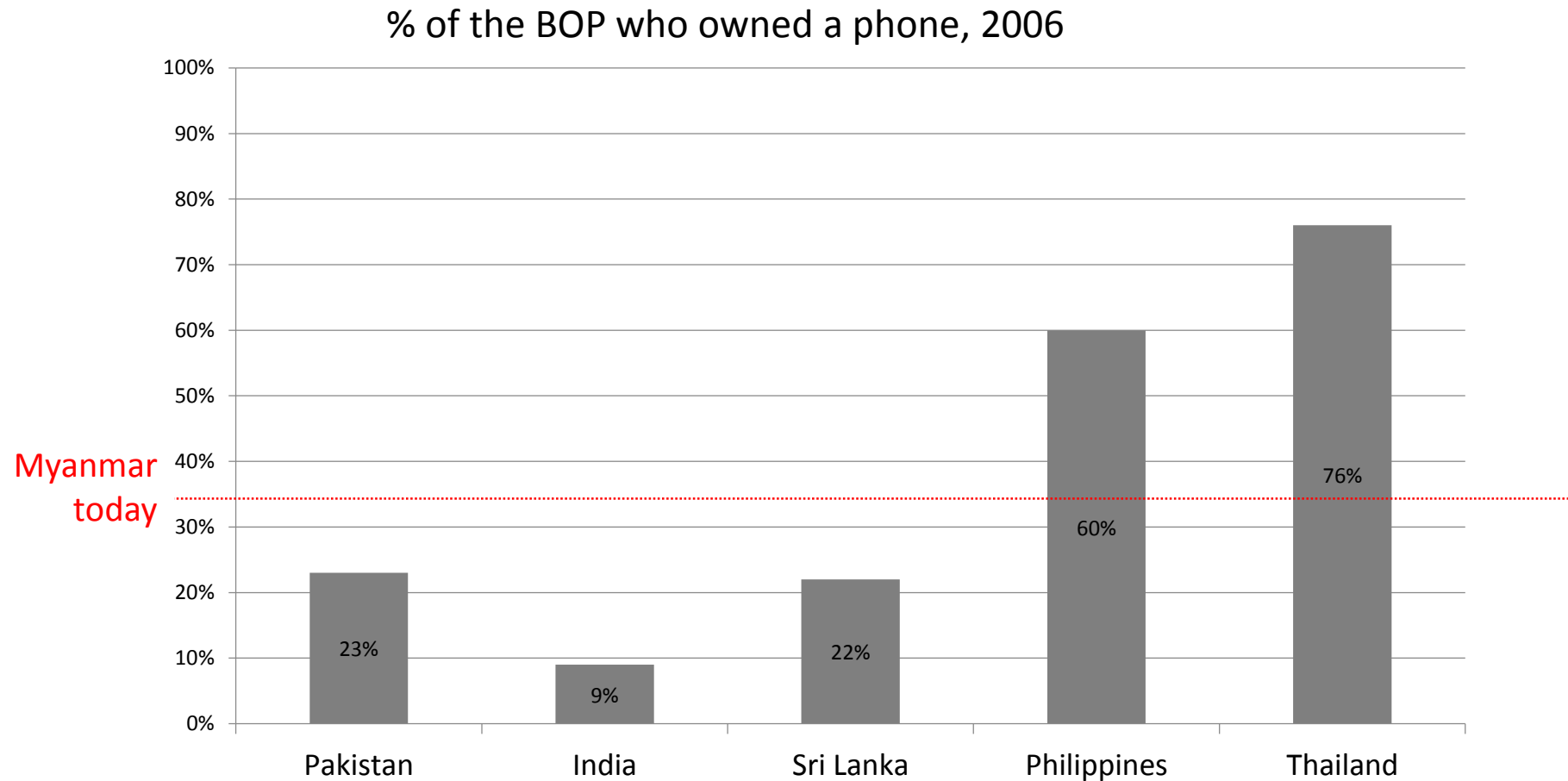
More mobile subscribers are in higher spending households.



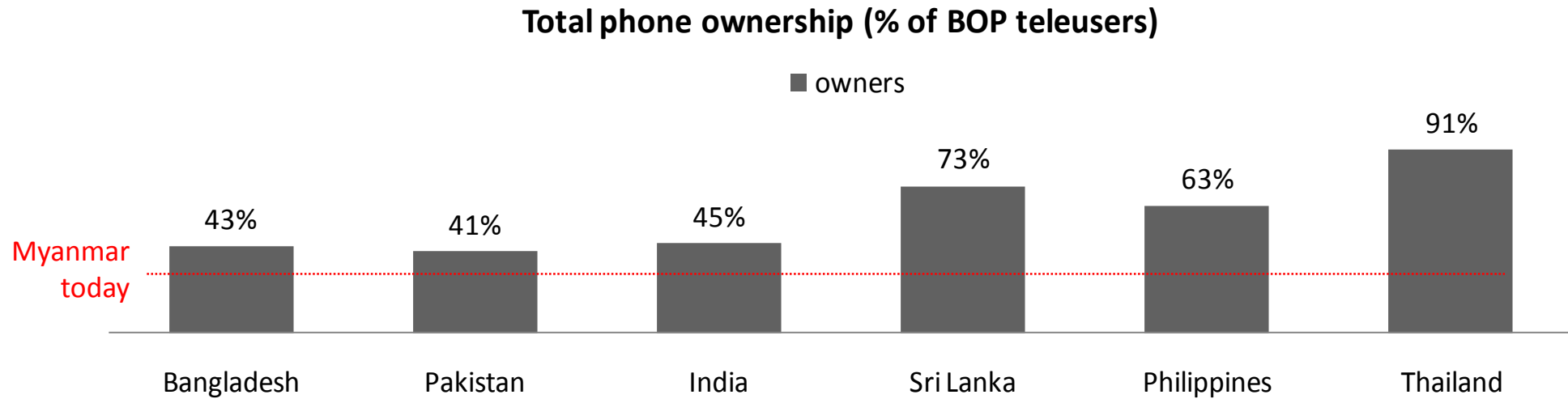
Q: Which describes your status of mobile phone ownership?

Base: All respondents

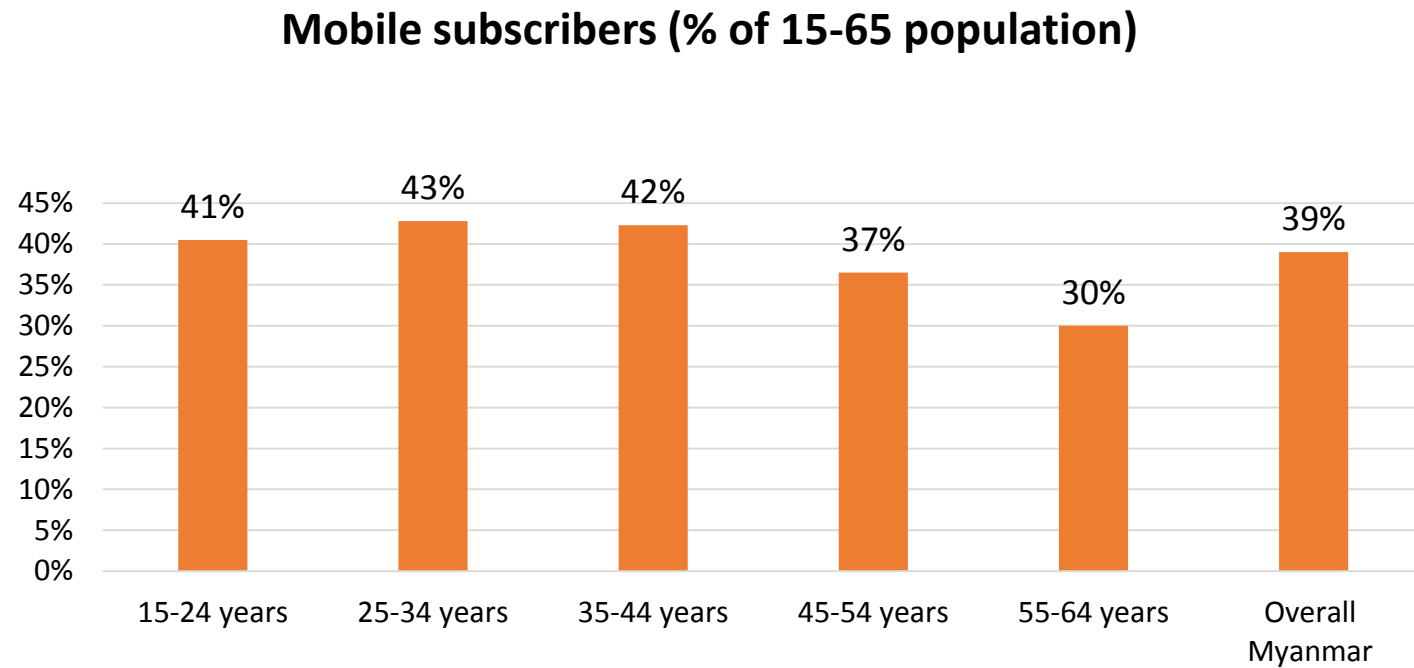
35% phone penetration in poor Myanmar households 6 months after liberalization, compared to Asian neighbors, ~ 9 yrs after they liberalized....



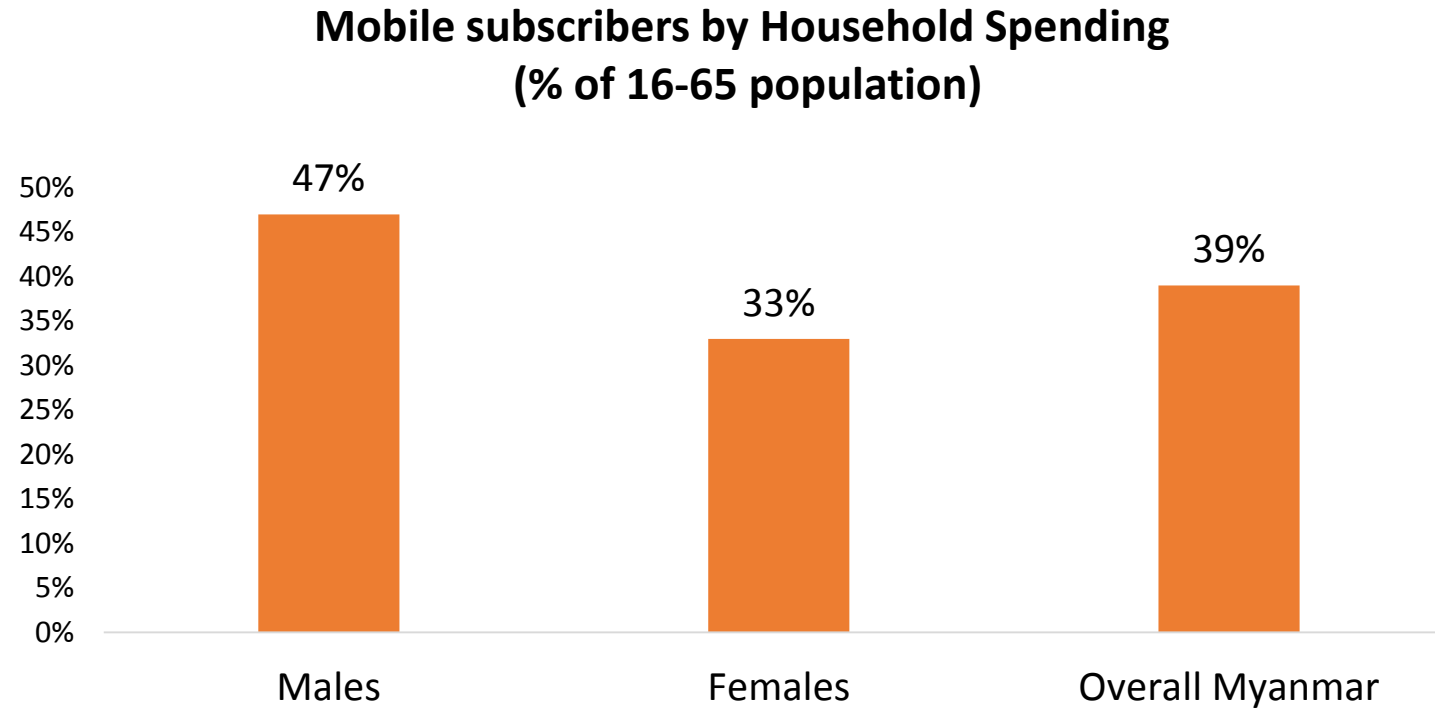
...and compared to 2008 (11+ years after they started liberalization)



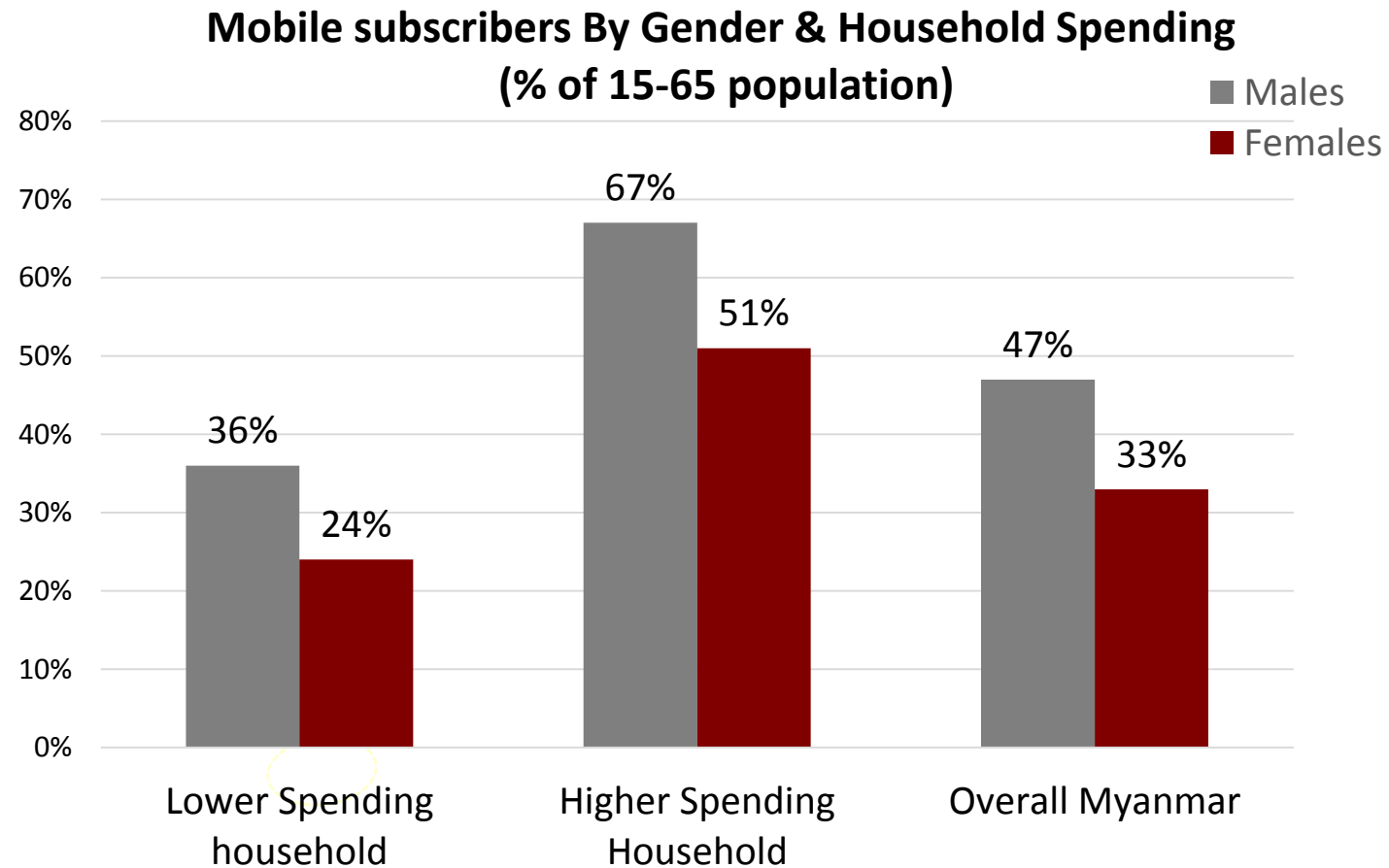
Penetration highest among 15-44 year olds.



Gender gap in phone ownership higher than in use

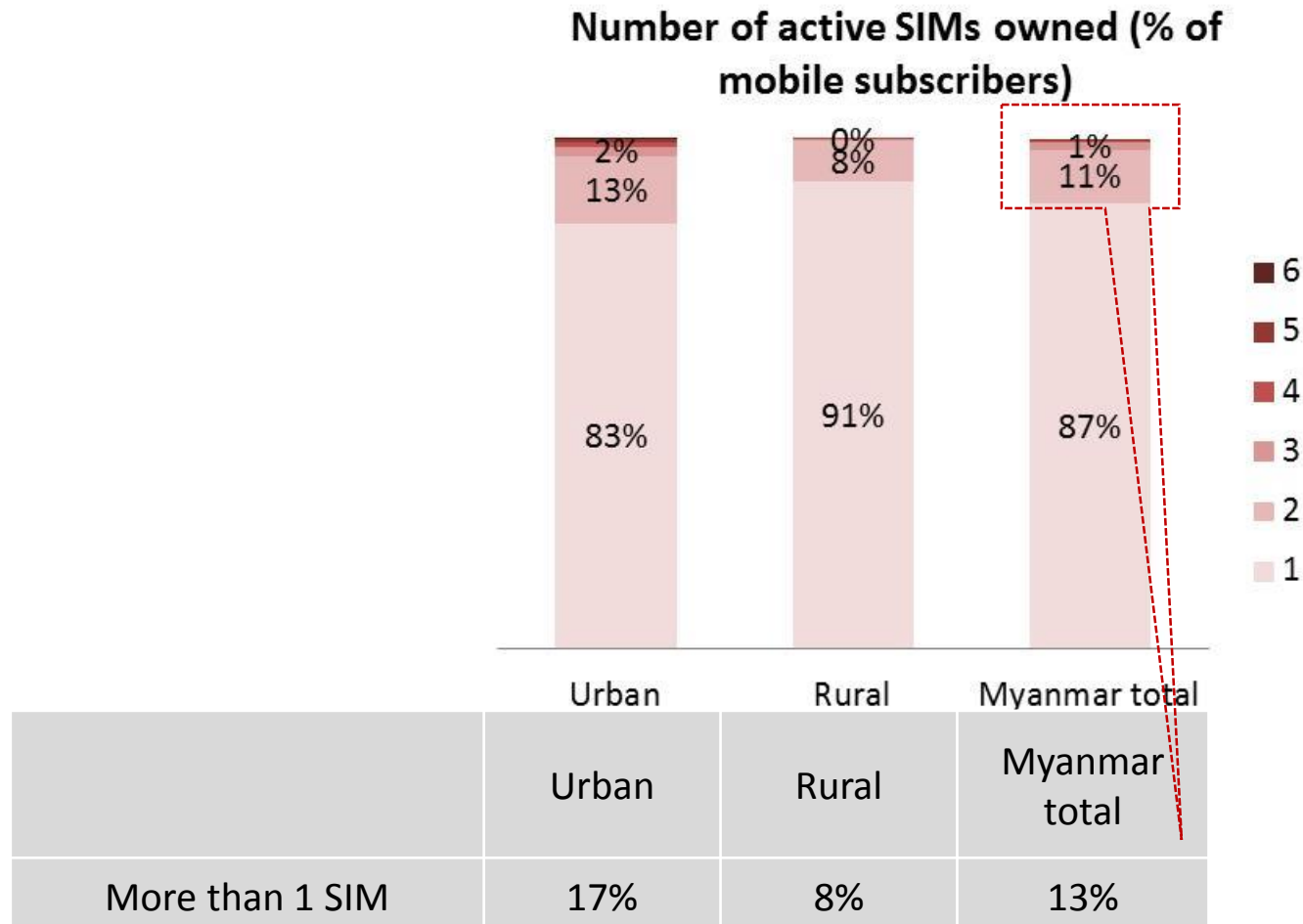


Gender gap in mobile ownership exists in high and low-spending households. Beyond just income...



Q: Which describes your status of mobile phone ownership?

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

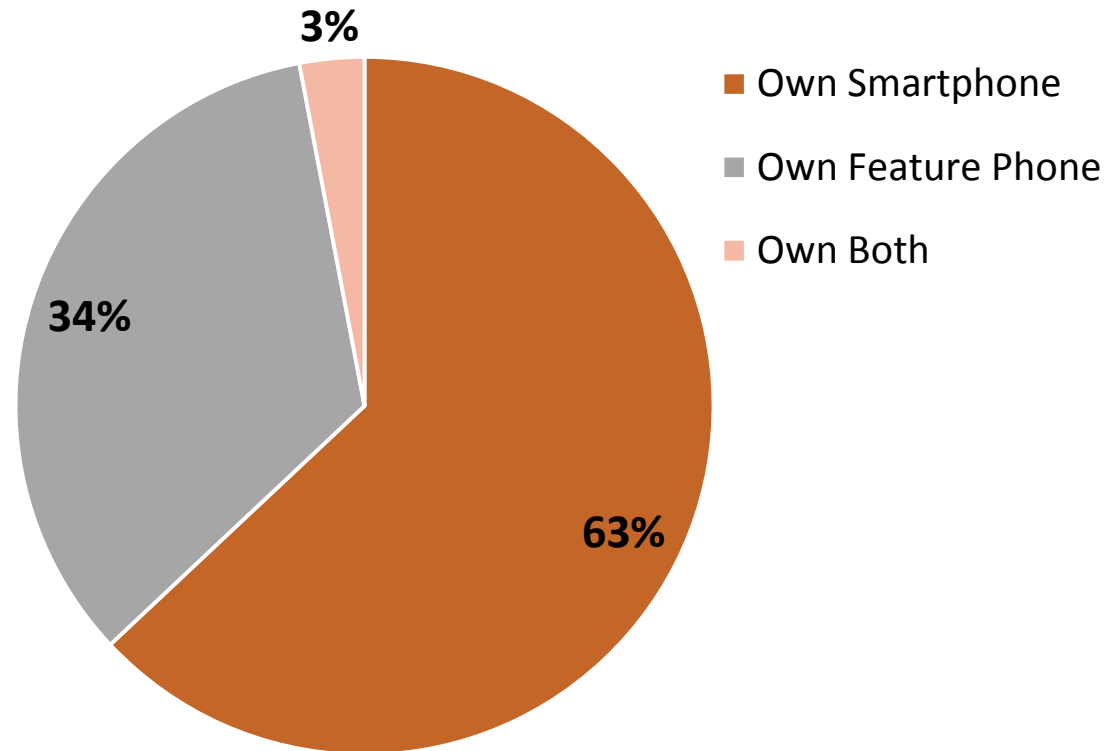


Q:How many active SIM cards you have in total? (SIM cards that you have used in the last 30 days)

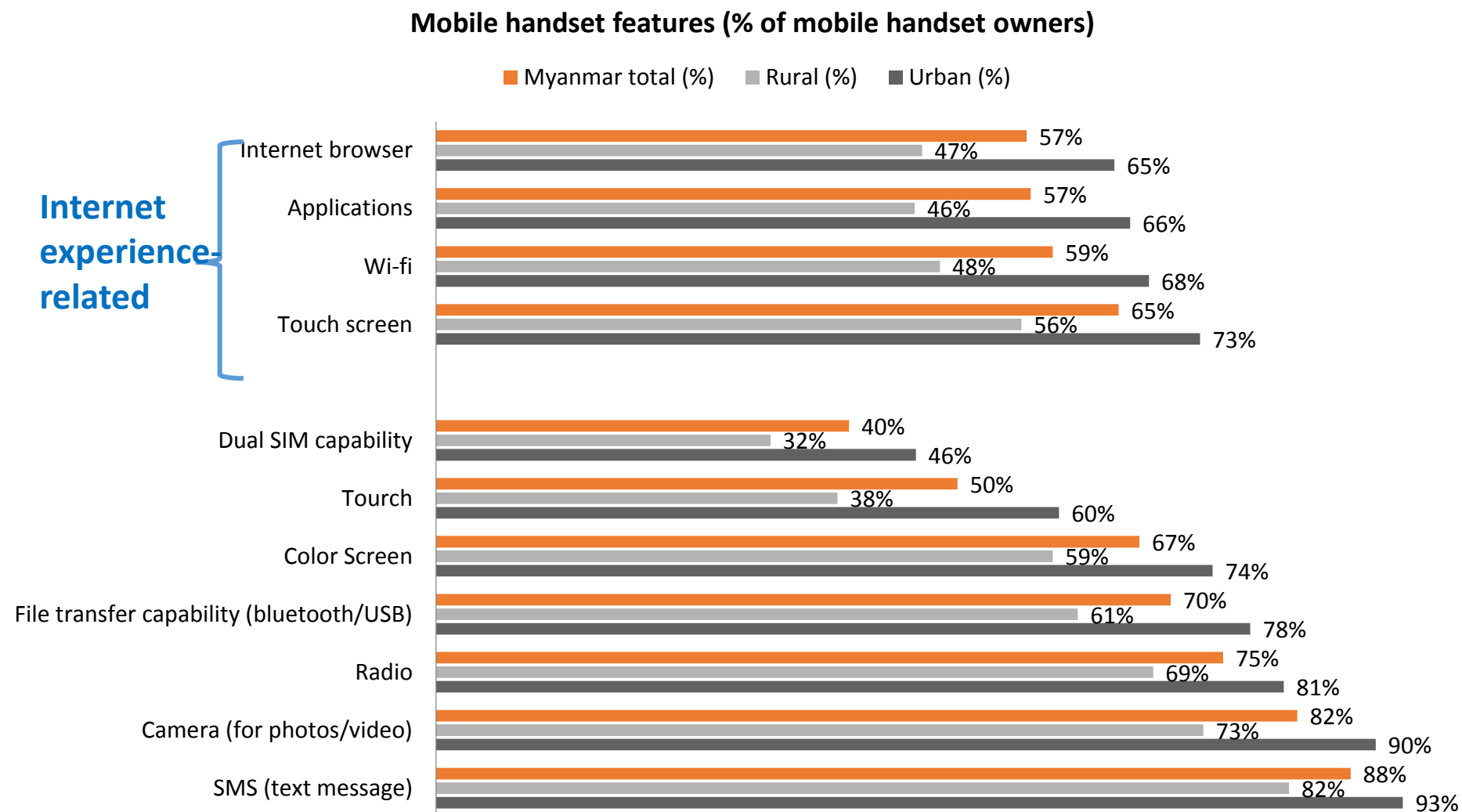
Base: Mobile phone subscribers

Smartphones dominate: 63% all subscribers have one

Handset Type (as % of Mobile Subscribers)



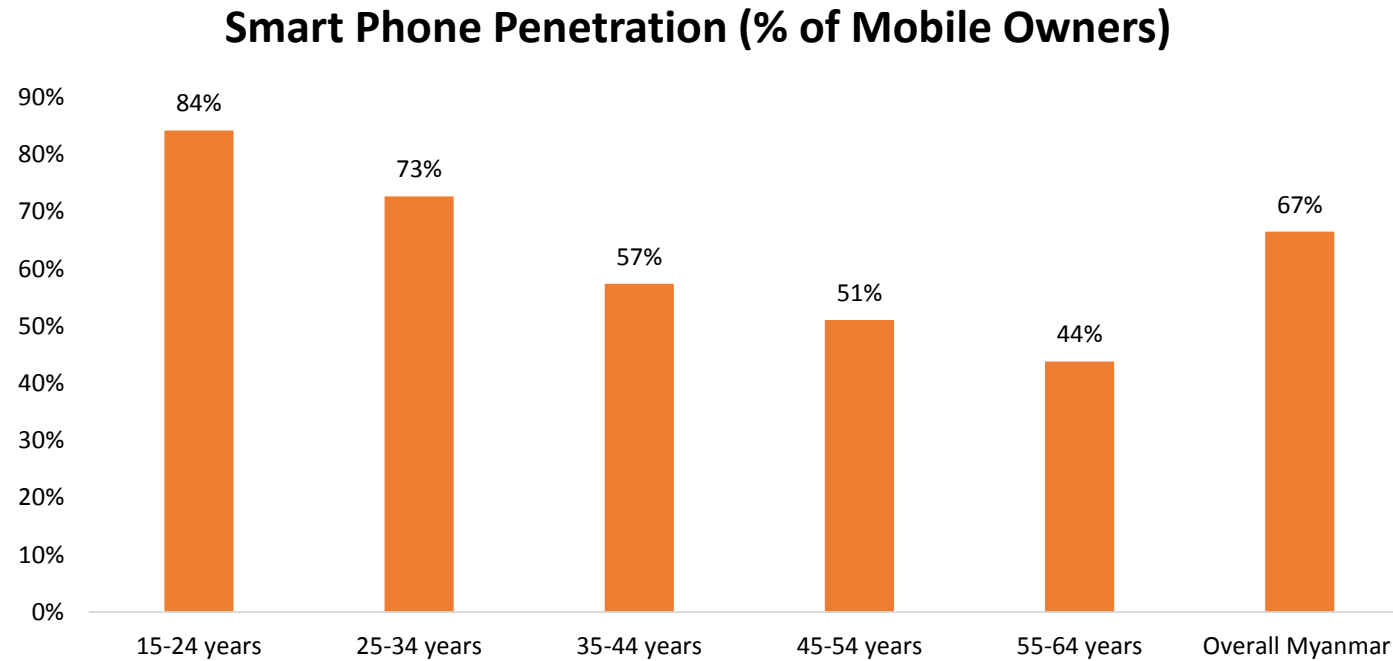
...with internet-ready features



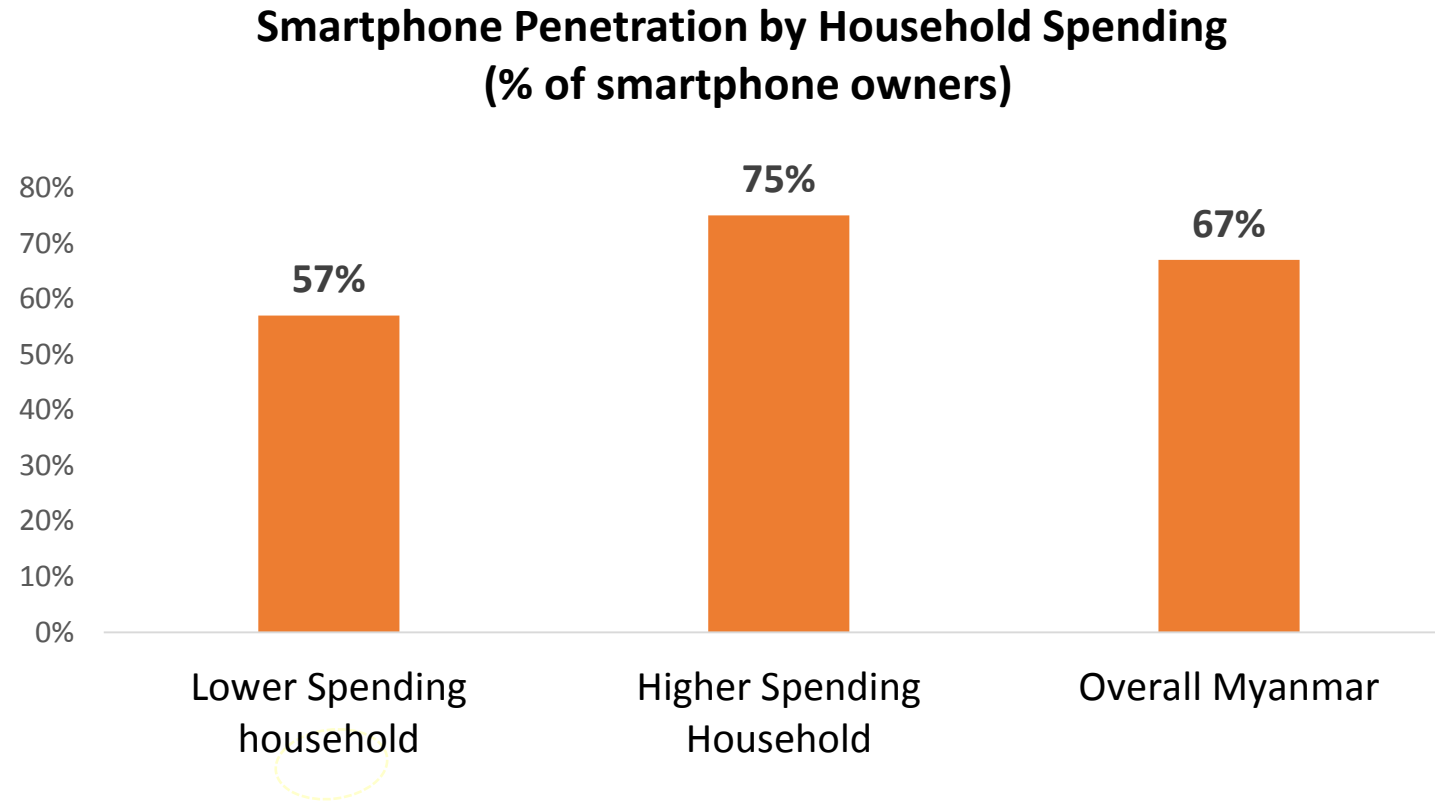
Q:What are the features your phone has?

Base: Those who own a mobile handset

Smartphone ownership highest among younger age groups: 84% of 15-24 year olds have one

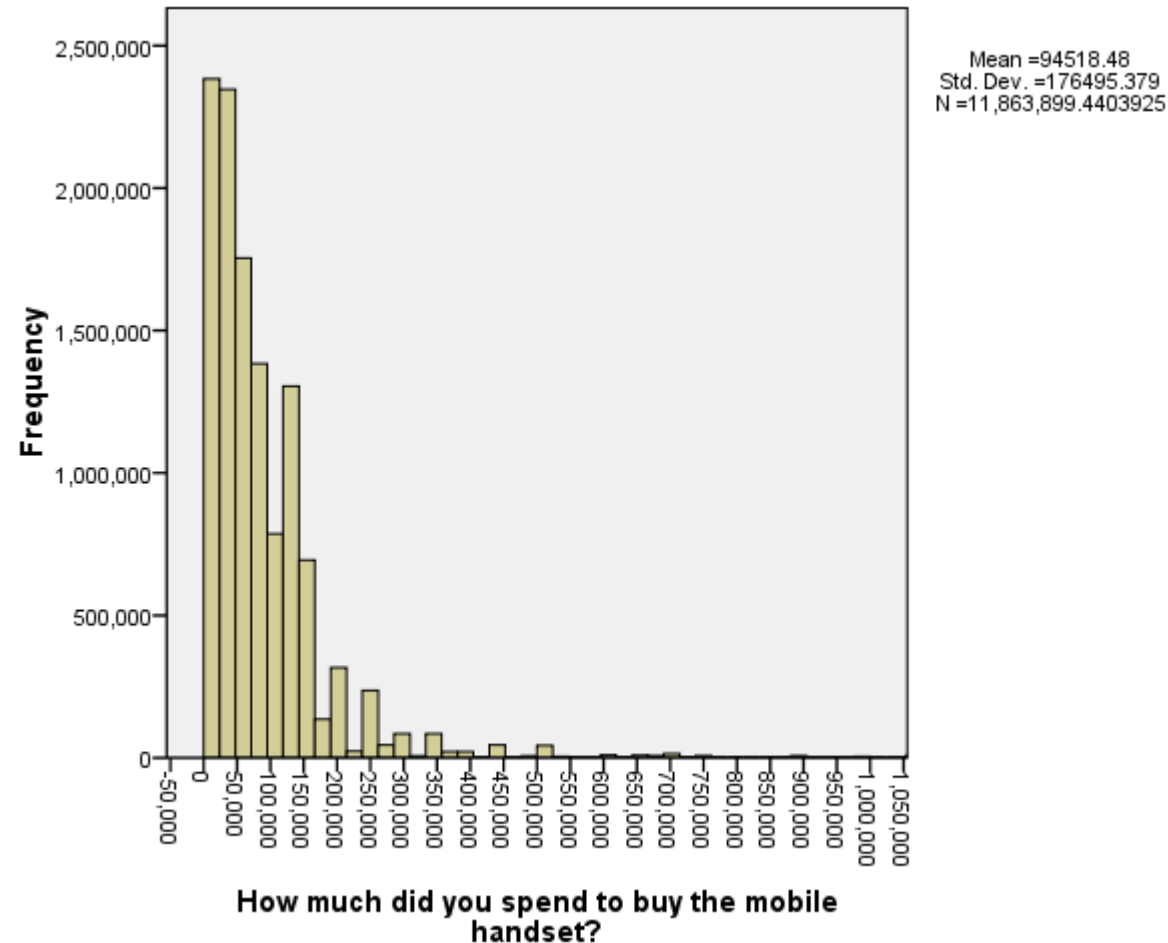


No surprise: Smartphone ownership higher among the rich



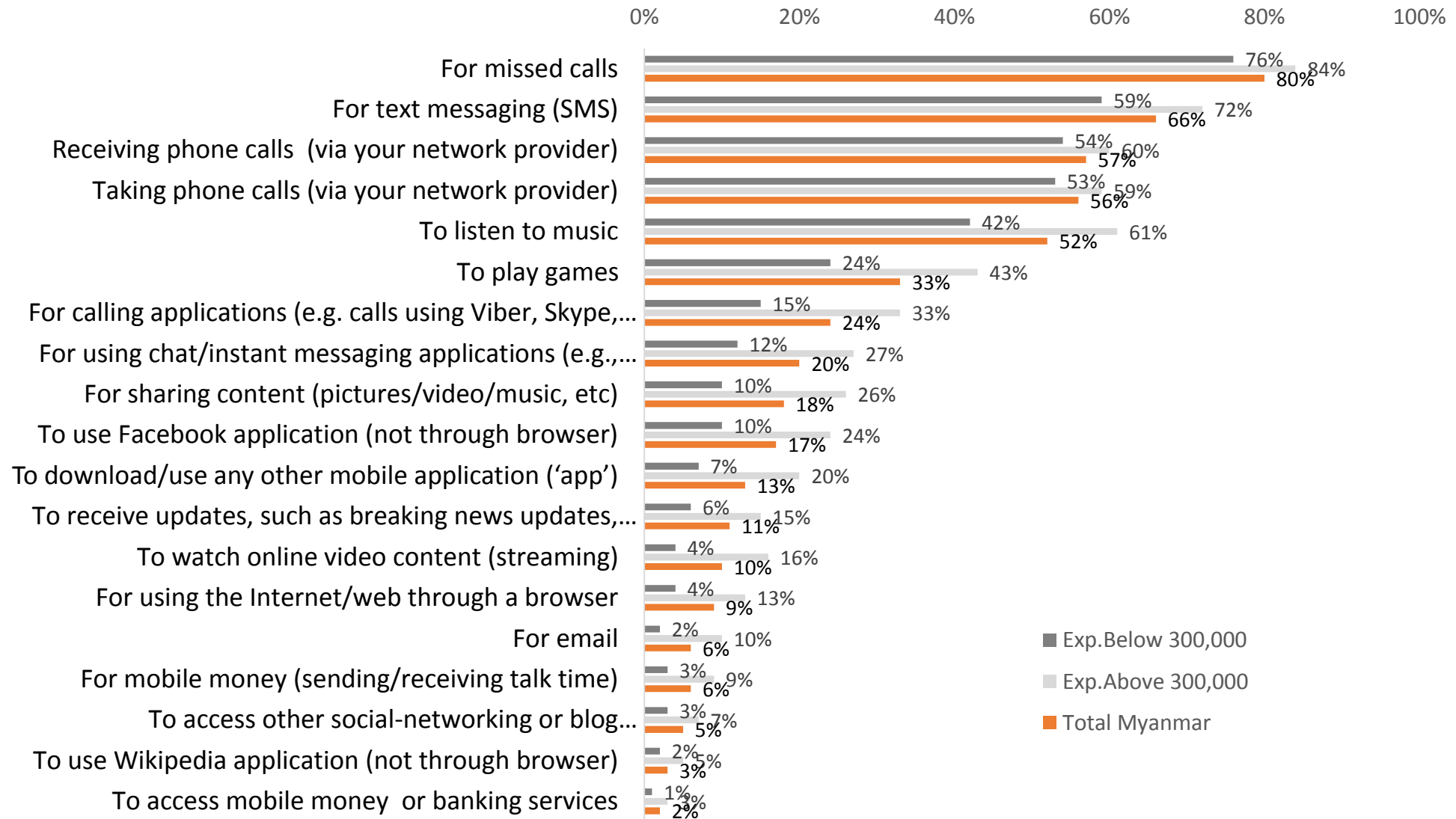
Q: Which describes your status of mobile phone ownership?

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



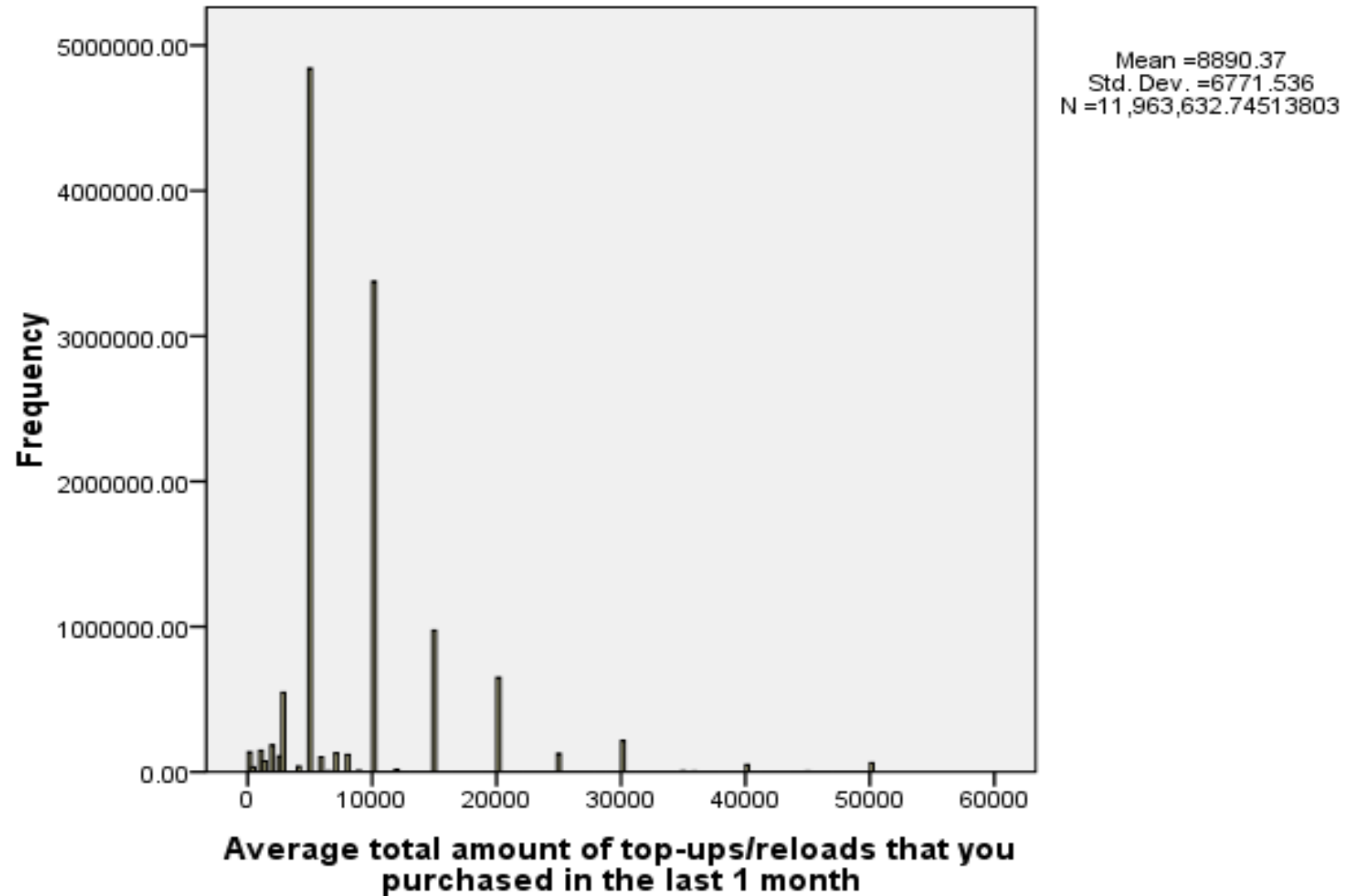
Mobile used mainly for voice, SMS, missed calls, music, games

What are you using your phone for? (% of mobile subscribers)

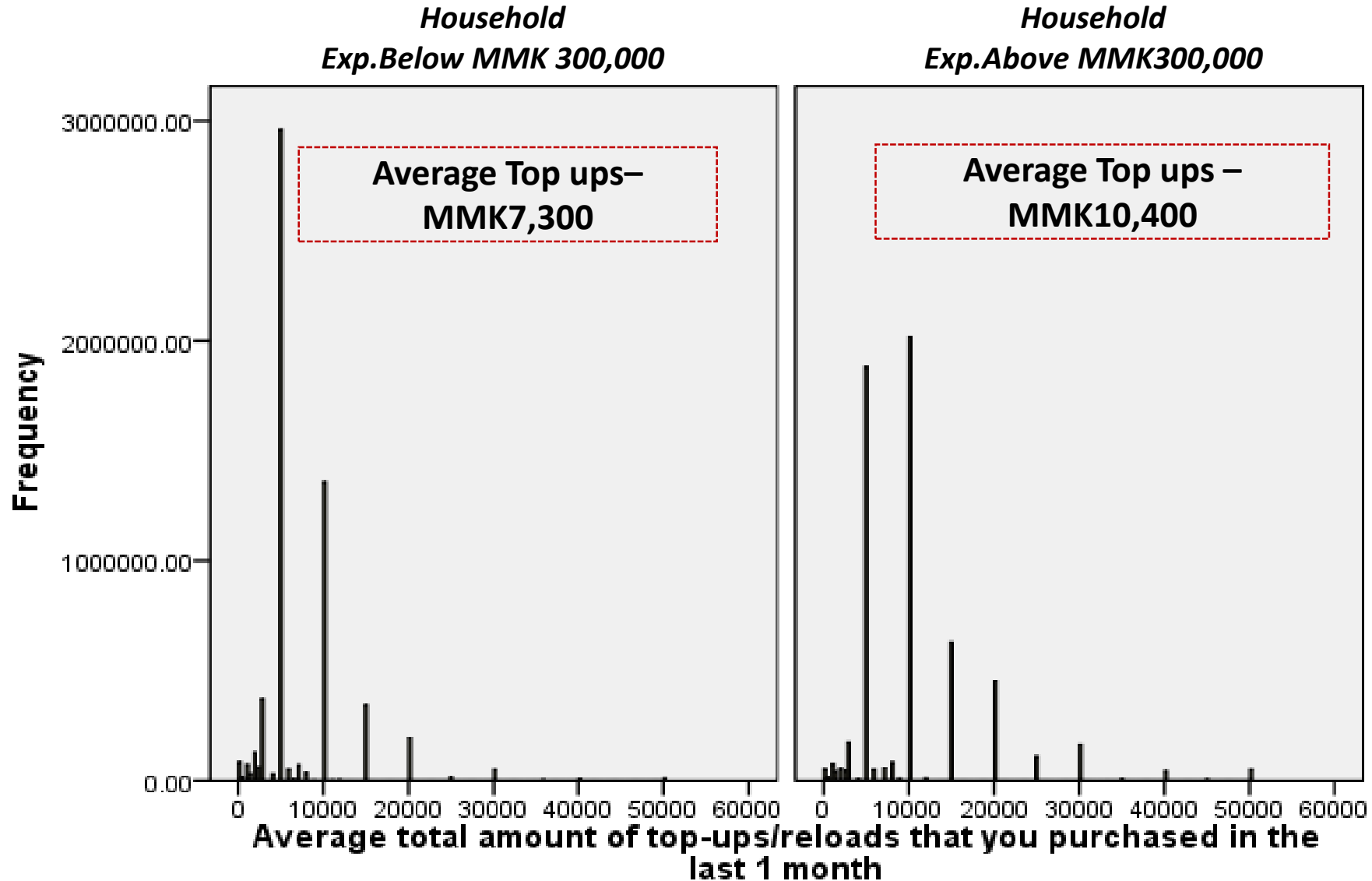


Base: All who own a mobile phone

MMK 8890 (USD8), on average, spent on top-ups per month



Poorer households spend ~MMK 7300
(USD7)/month on average



Computer 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%

Internet use via a browser (in the 'traditional' way) is also very low. Even then, mobiles drive use and Facebook dominates

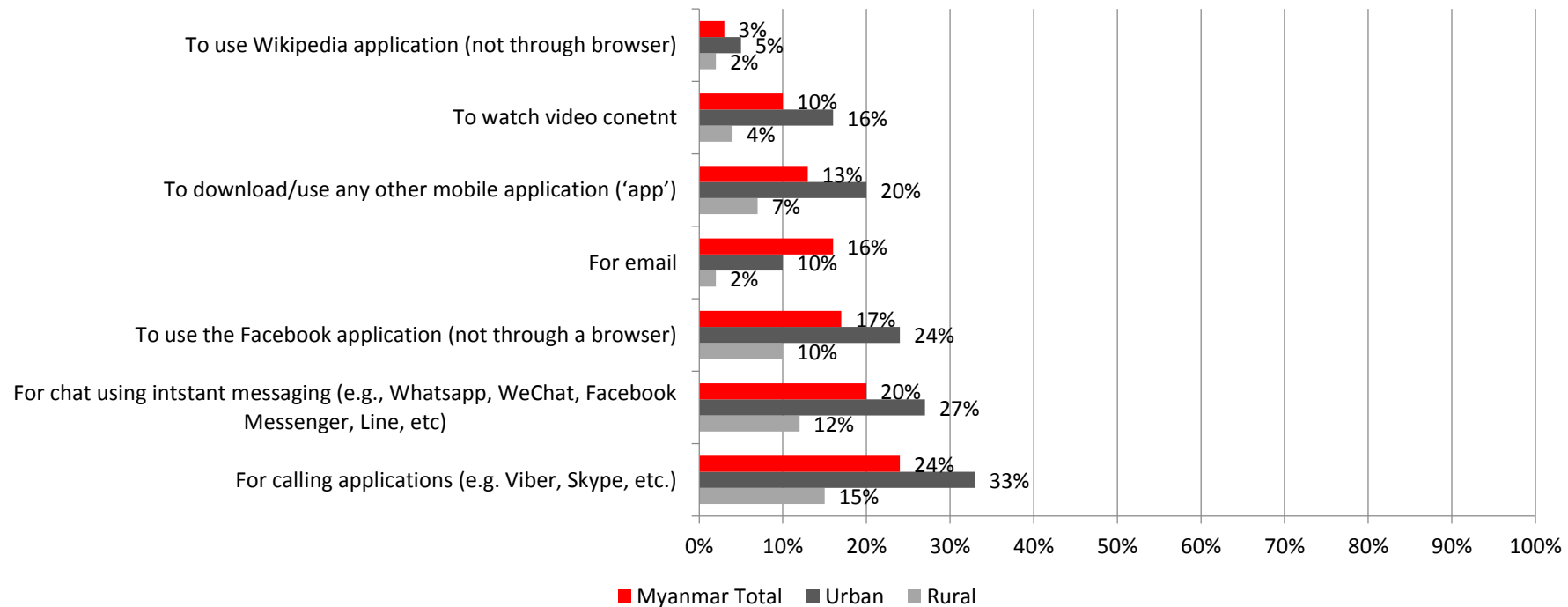
Have you used the Internet through a browser (e.g., UC Browser, Opera, , Chrome, Mozilla Firefox, Dolphin, Internet Explorer etc.) on a tab, computer or mobile phone in the last 12 months

	% 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%).

But people ARE on the Internet: using VOIP, text messaging apps (Whatsapp, WeChat, Facebook Messenger, Line), Facebook

What are you using your phone for? (% of mobile subscribers)



Test-bed for attractiveness of zero-rated content: Popular if aware/offered

Does your mobile service provider provide any 'free' content through your mobile service plan? (% of mobile subscribers)

	Urban	Rural	Total Myanmar
Wiki-zero	1%	0%	1%
Facebook-zero	8%	4%	6%
certain music/songs/ring tones I can listen to/	4%	2%	3%
certain pictures/video I can download/view for free	2%	2%	2%
other types of content	2%	3%	2%
None	44%	38%	42%
Don't Know	41%	55%	45%
<i>Base : All mobile subscribers</i>			

**Do you use any of these applications/services?
(% of those offered free applications/services)**

	Urban	Rural	Total Myanmar
Wiki-zero	9%	7%	8%
Facebook-zero	54%	36%	49%
Certain music/songs/ring tones I can listen to/	22%	19%	20%
Certain pictures/video I can download/view for free	6%	2%	5%
Other types of content	12%	23%	14%
None	6%	16%	7%
<i>Base: Those whose service provider offered free content</i>			

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

	Myanmar Total (% 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%

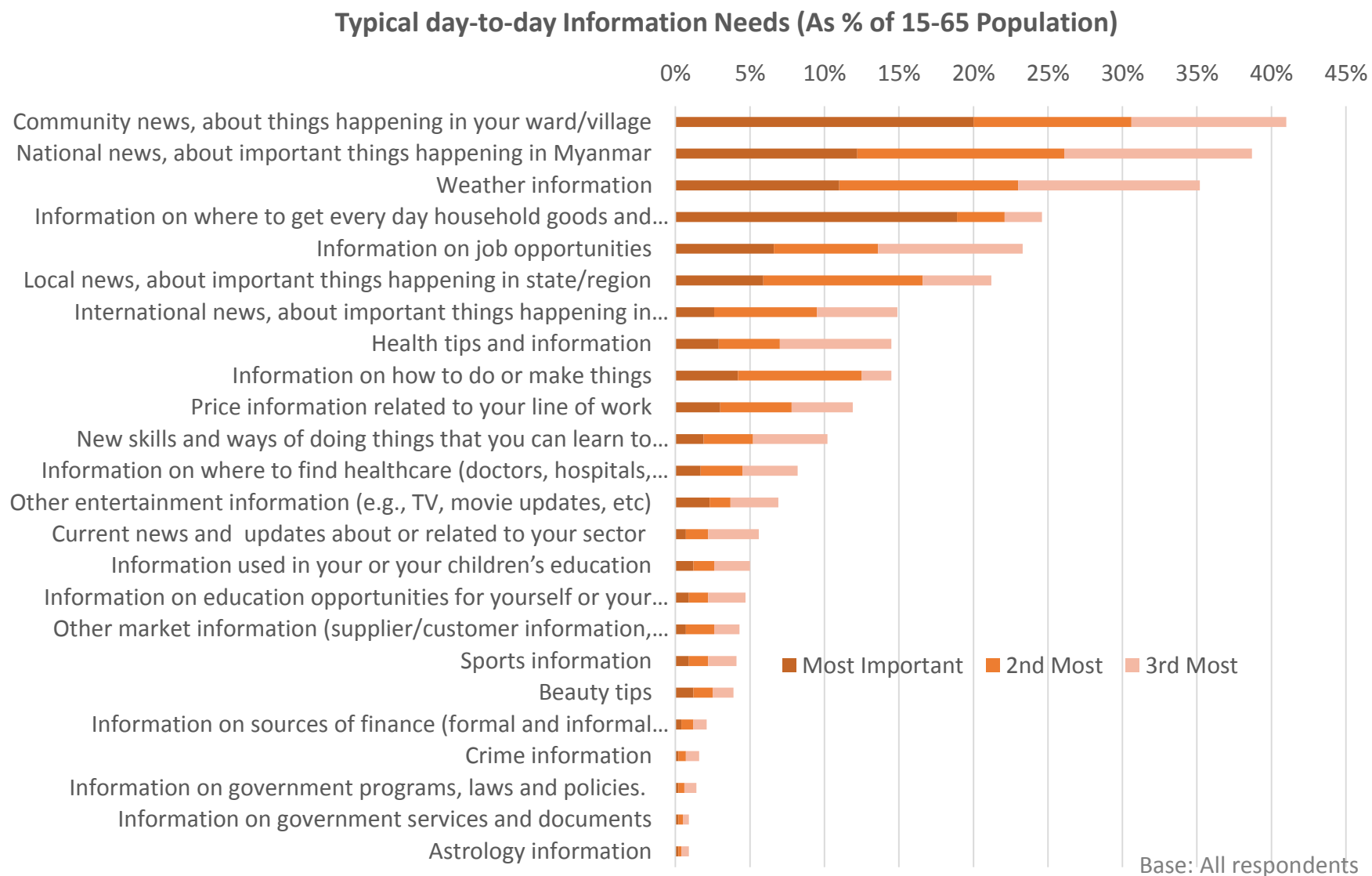
Base: All respondents

What are you using your phone for? (% of mobile subscribers)

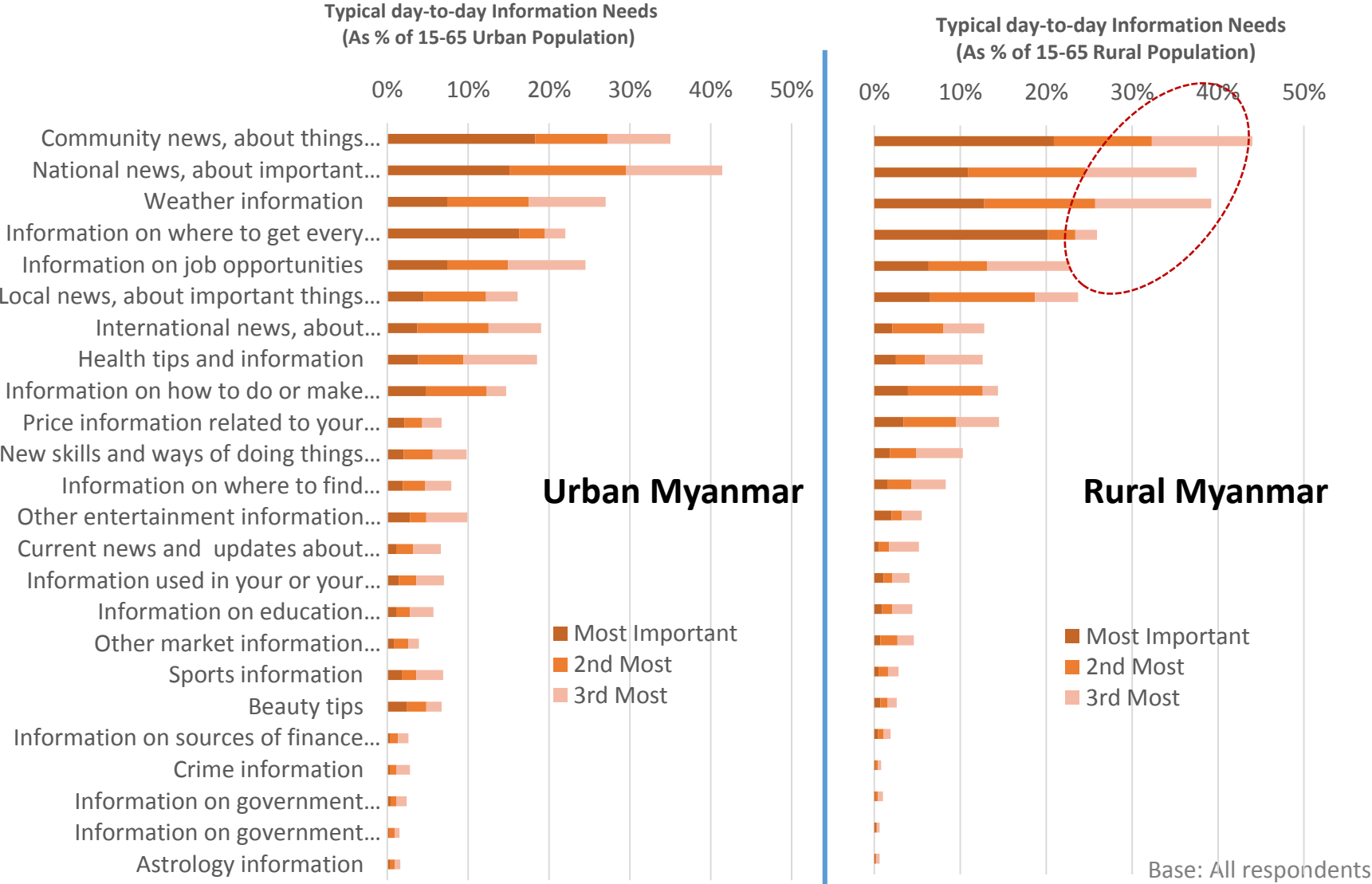
	Rural	Urban	Myanmar Total (% 15-65 yr olds)
For calling applications (e.g. Viber, Skype, etc.)	15%	33%	24%
For chat using instant messaging (e.g., Whatsapp, WeChat, Facebook Messenger, Line, etc.)	12%	27%	20%
To use the Facebook application (not through a browser)	10%	24%	17%
For email	2%	10%	16%
To download/use any other mobile application ('app')	7%	20%	13%
To watch video content	4%	16%	10%
To use Wikipedia application (not through browser)	2%	5%	3%

Base: All respondents

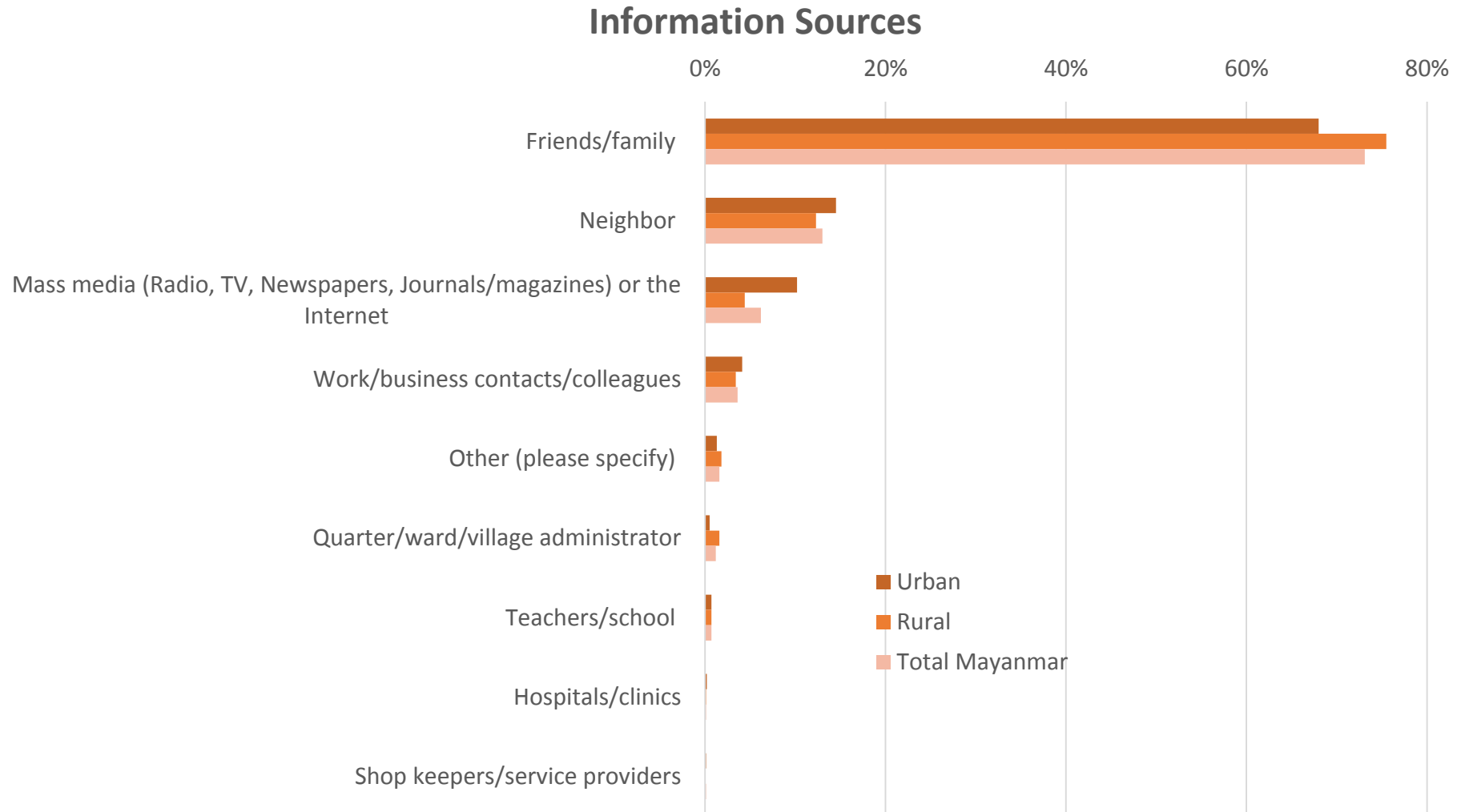
Information needs: Thirst for news (national & community), weather, where to obtain daily goods/services, jobs



Urban and rural information needs compared



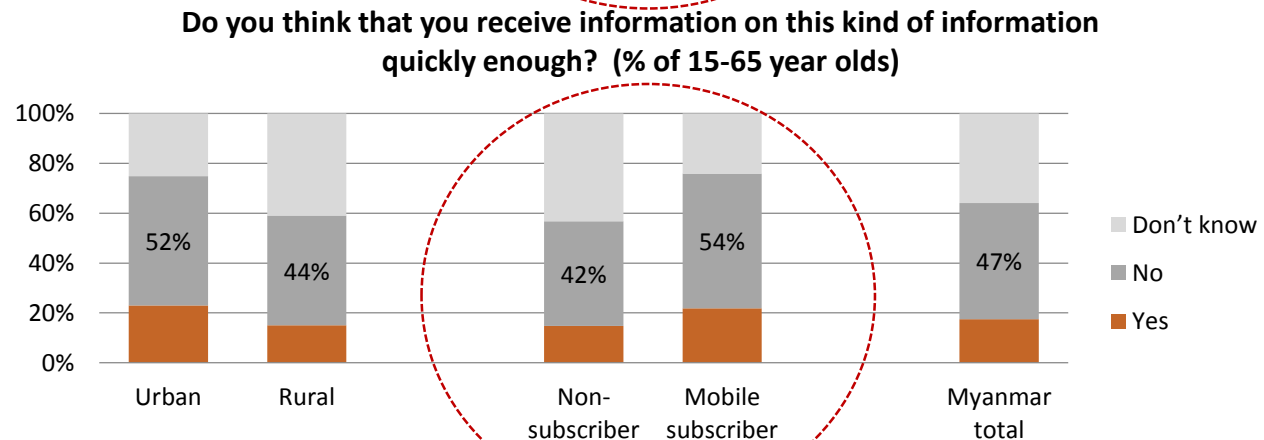
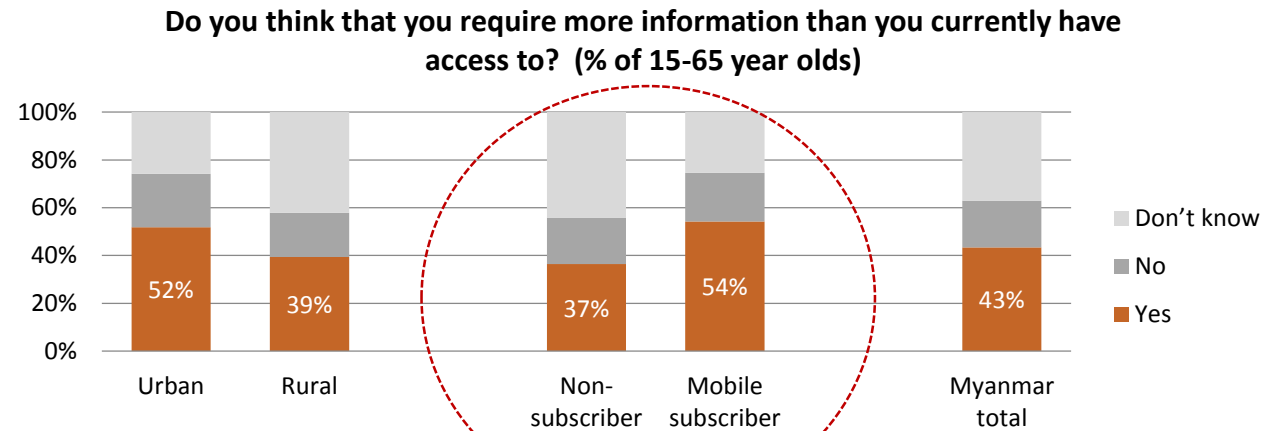
Friends, family and neighbors are main information sources today



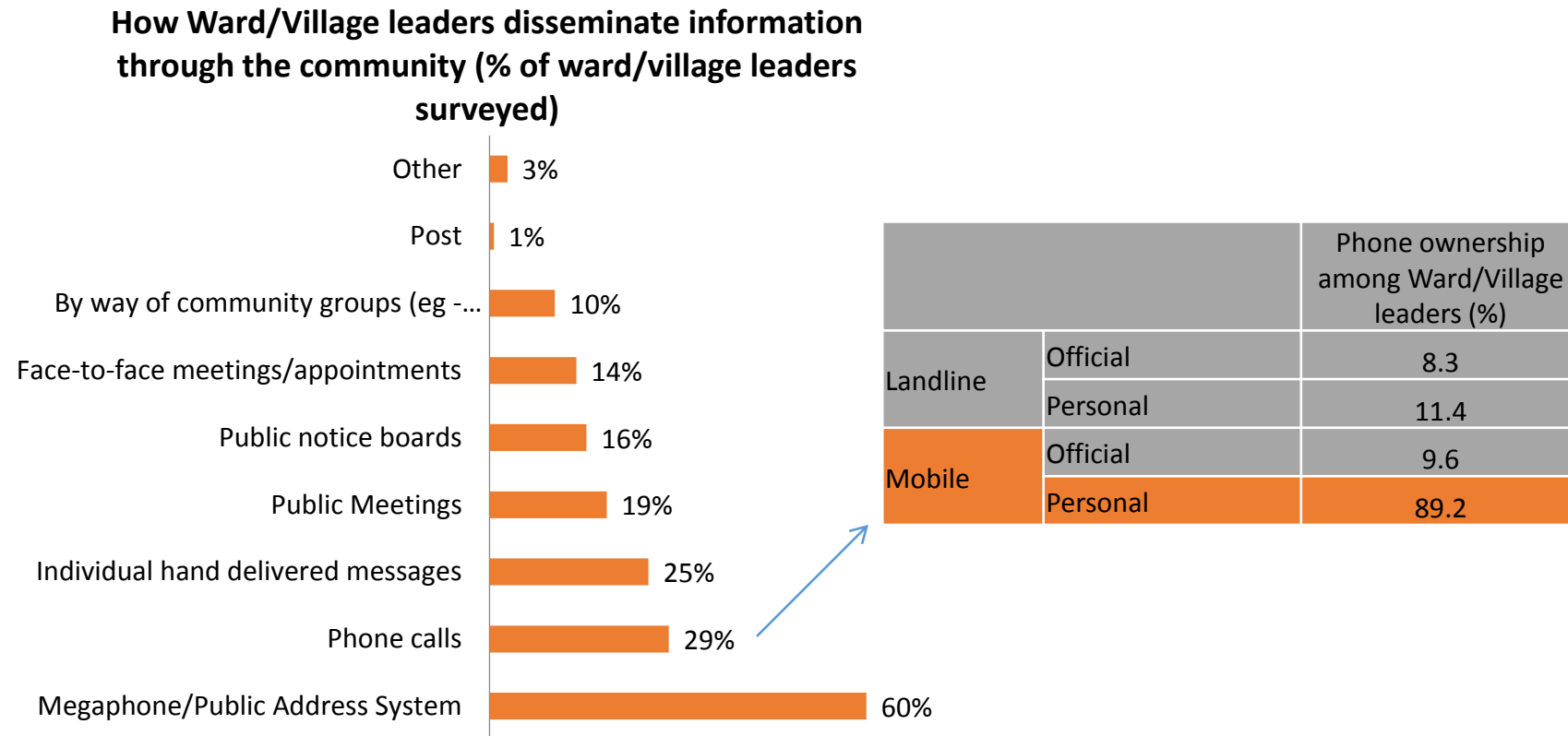
Q: Who do you usually obtain that kind of information?

Base : All respondents

Mobile subscribers are 'hungrier' for information – want more, faster



Ward/village leaders use phones as the second mode of disseminating information



Opportunities to improve: information from superiors/peers still through physical visits

	Urban %	Rural %	Total %
Yes, have sufficient information and resources (e.g., forms) to assist them on the first visit	82%	74%	76%
No, we do not have sufficient information and resources (e.g., forms) to assist them on the first visit	16%	26%	22%
Don't know	2%	1%	1%
Base : Ward/Village representatives			

Mode of Communication	%
Go to (visit) higher relevant government office/department	28.9
Go to (visit) another ward/village tract administrator (same level)	22.0
Contact via mobile phone higher relevant government office/department	20.6
Contact via mobile phone another ward/village tract administrator (same level)	13.4
Contact via phone higher relevant government office/department	7.6
Other	7.6