

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

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Note: This is an updated version of the slides which were presented on 18 May 2015. There are minor differences between the two versions due to the recalculation of weights used to estimate population numbers. The previous weights were calculated using 2014 national census data, but the release of the more granular 2014 census data (on 29 May 2015) enables greater precision in our estimates. All slides where numbers have changed are clearly marked.

# 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

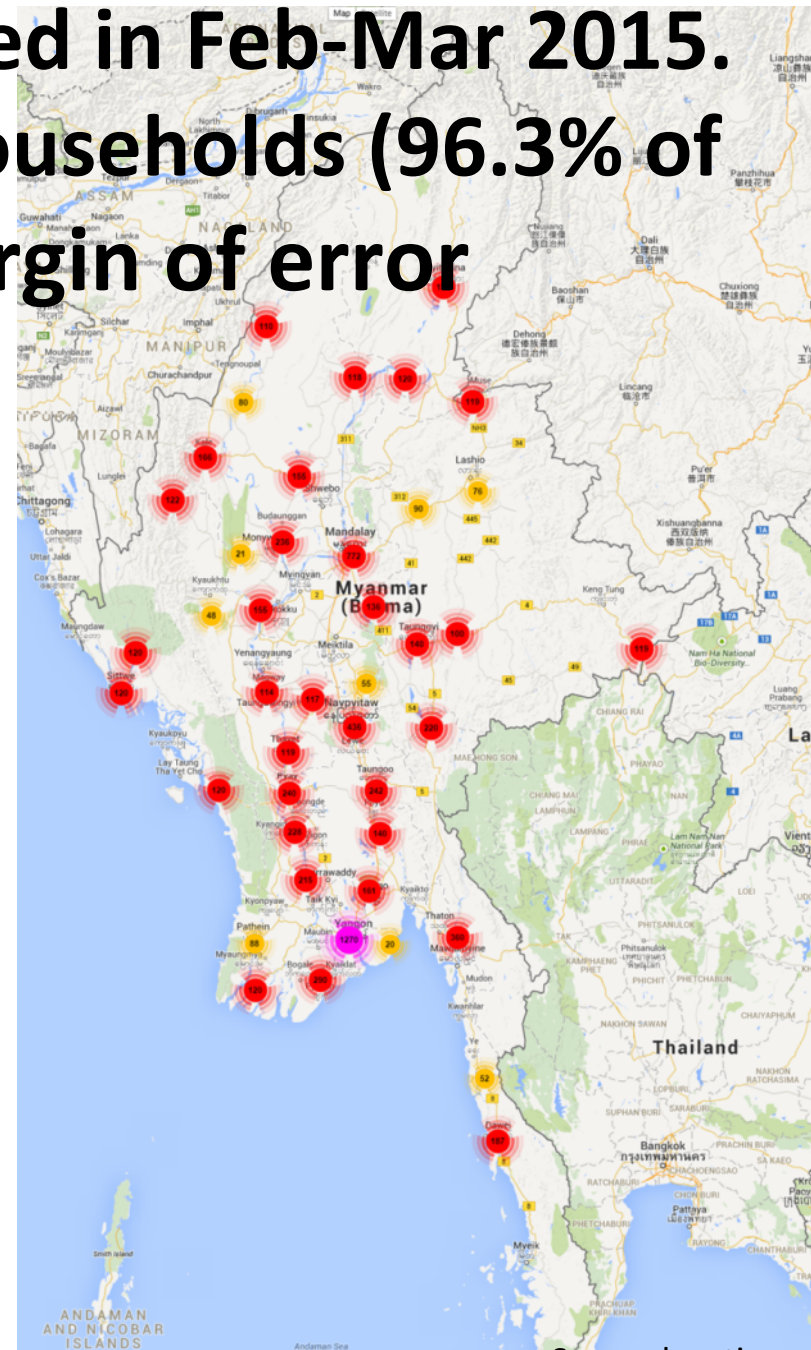
**NATIONALLY REPRESENTATIVE  
BASELINE SURVEY ON ICT NEEDS AND  
USAGE IN MYANMAR**

# 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



Survey locations  
Source: Survey Solutions

Baseline survey findings

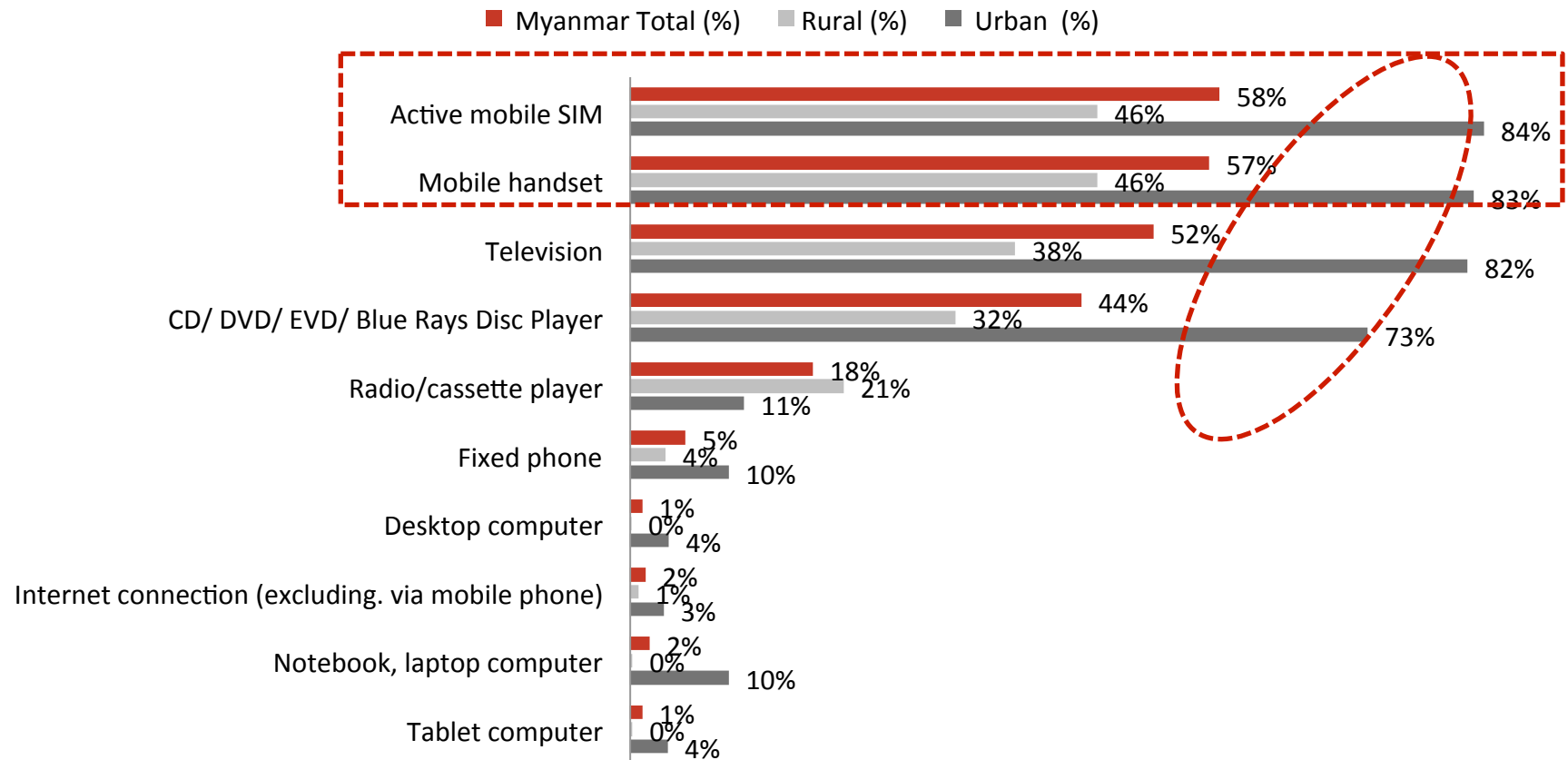
# **ACCESS**

# 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%

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

Household access to ICTs (% of households)



Base: All households

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

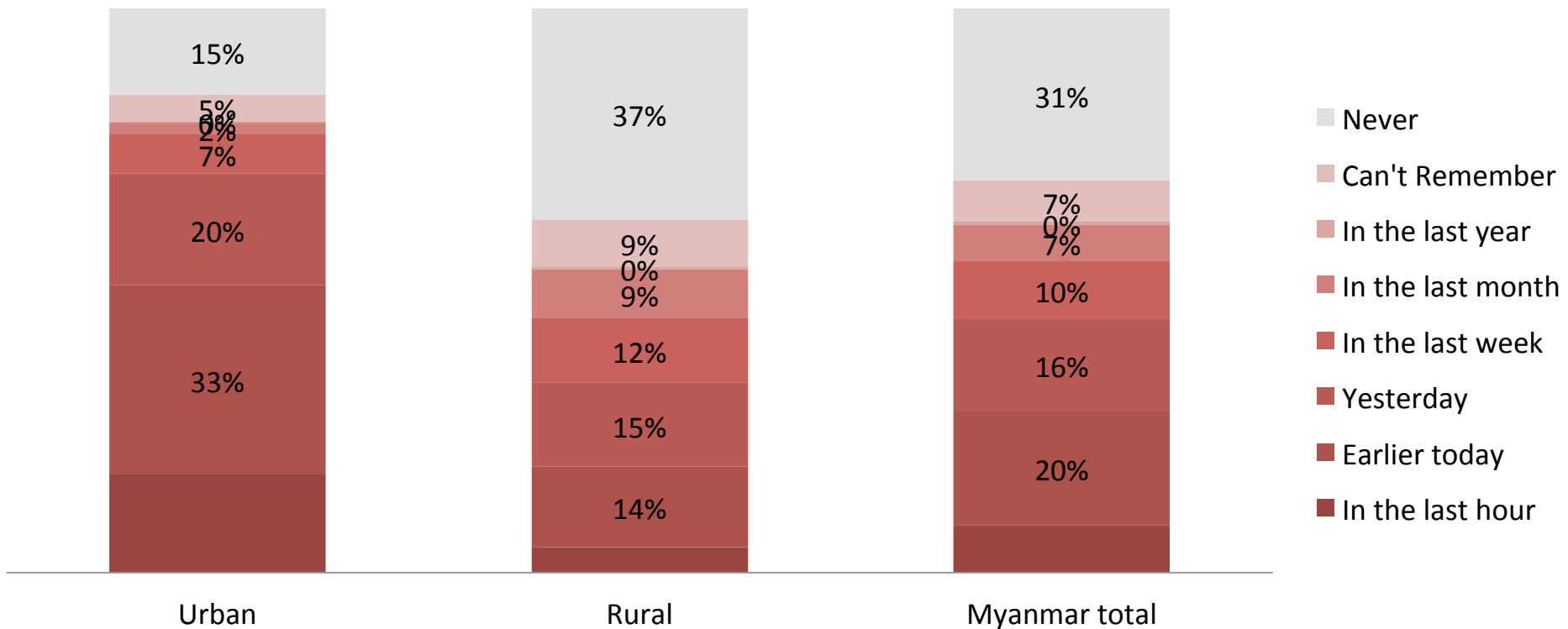


Baseline survey findings

**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

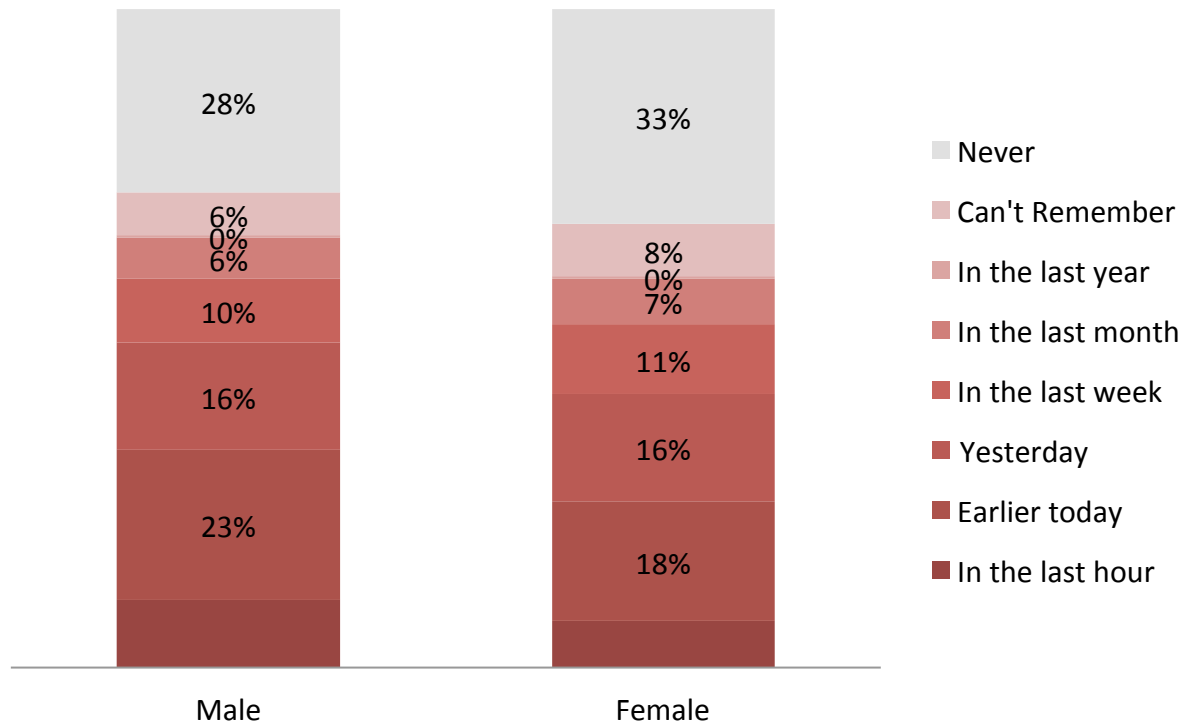
When was the last time you used a phone? (% of 15-65 year olds)



Base: All respondents

# Small gender variation: males more frequent teleusers

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

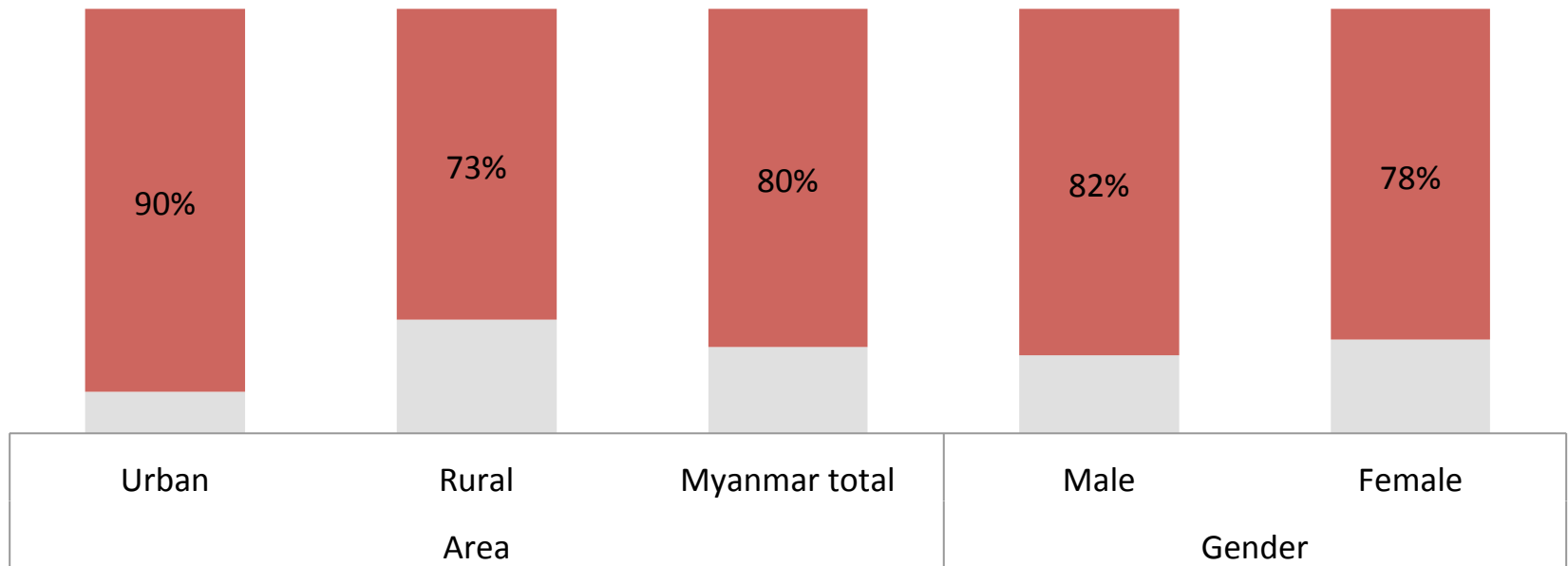


Q: When did you last use a phone to take or receive a call? It could be through your own phone, a neighbors' phone, a friend's phone, communication kiosk/shop or any other. It also need not be paid for?

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

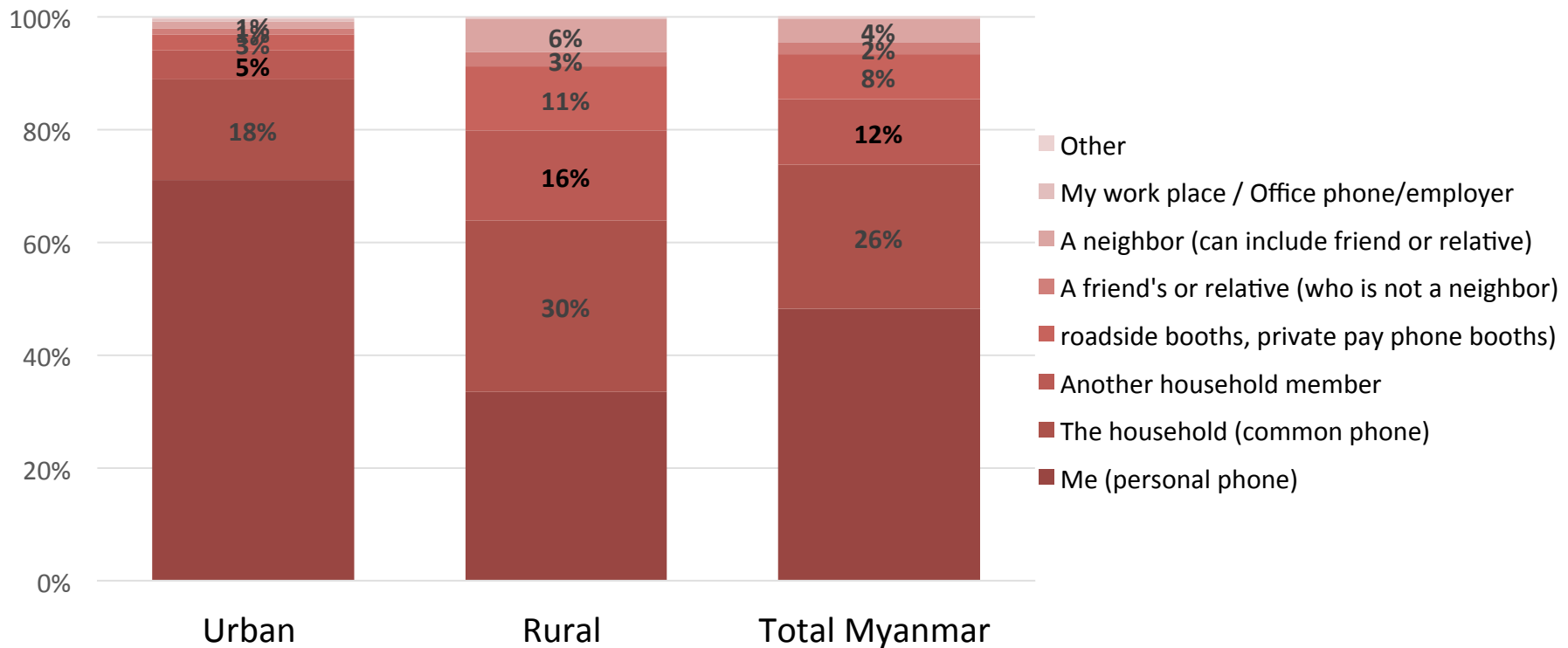
What type of phone did you use last? (% of 15-65 year olds who have used a phone before)

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



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

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

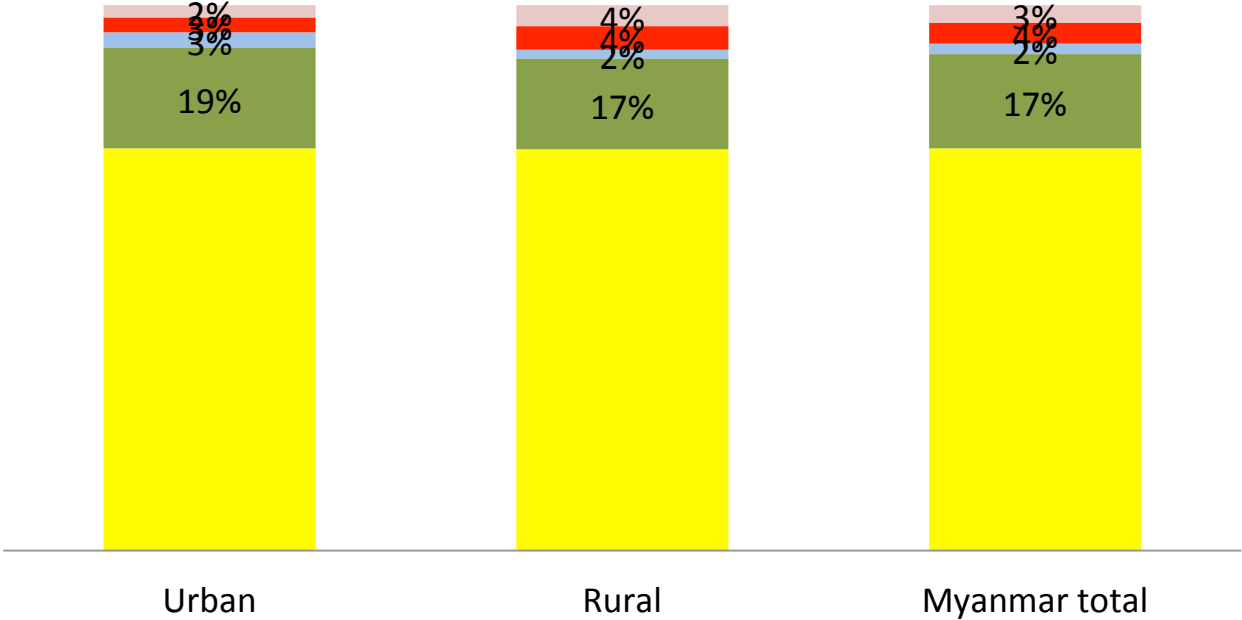


Q: What type of phone did you make or receive your last phone call from?

This slide was updated on 14 August 2015 using re-weighted data; weights were re-calculated with the *detailed* national census data which was released on 29 May 2015.

# 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)



- Other (please specify)
- Emergency communication
- Coordination of some other activity (excluding livelihood)
- Livelihood-related
- Social purposes / keeping in touch

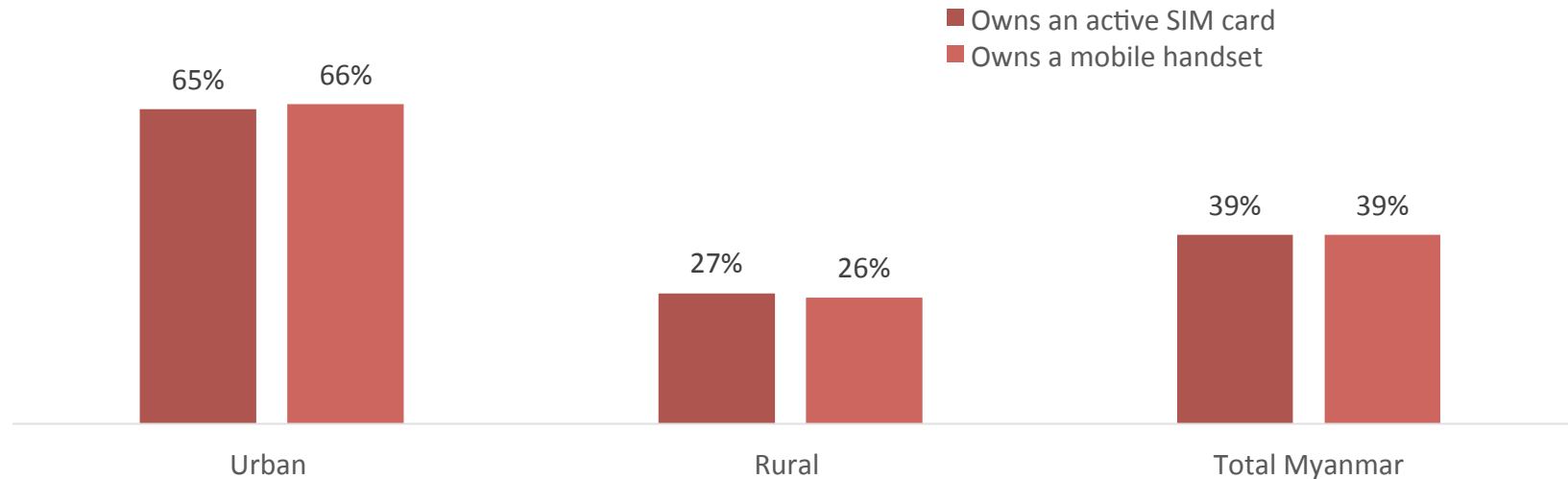
Q: Can you tell us the purpose of your call?

Baseline survey findings

# **MOBILE SUBSCRIBERS: OWNERSHIP AND USAGE**

# 39% Myanmar 15-65 population are mobile subscribers. ~ Matches govt./operator reported data

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



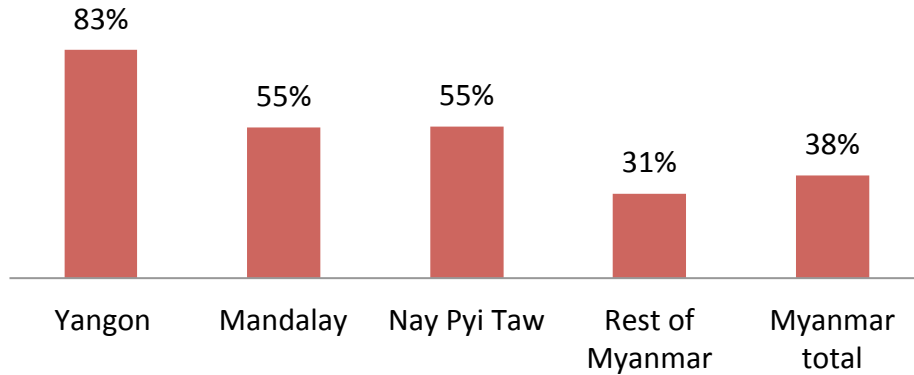
- City-wise SIM penetration:
  - Yangon-83%; Mandalay-55%; Nay Pyi Taw-55%

Q:Which describes your status of mobile phone ownership?

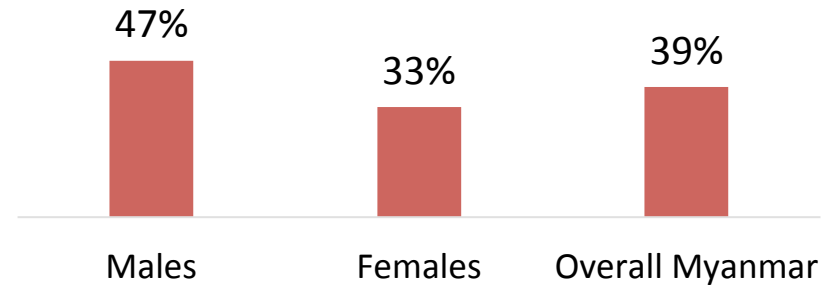


# Adoption driven by big cities; Gender gap in exists

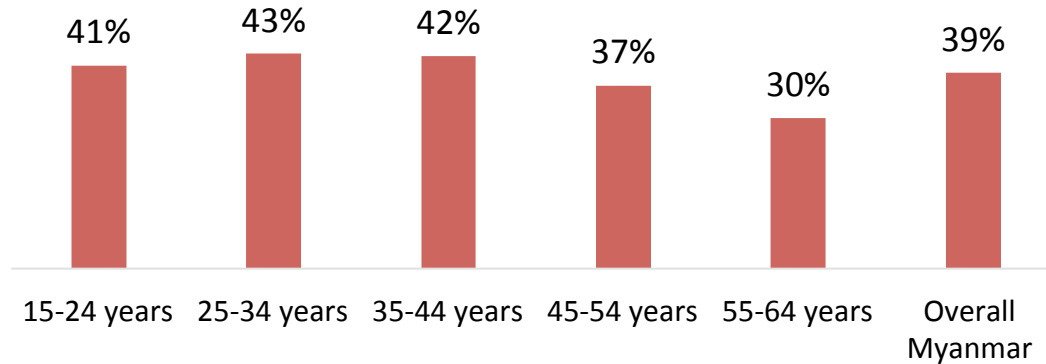
Mobile subscribers (% of 15-65 year olds)



Mobile subscribers by Household Spending (% of 16-65 population)



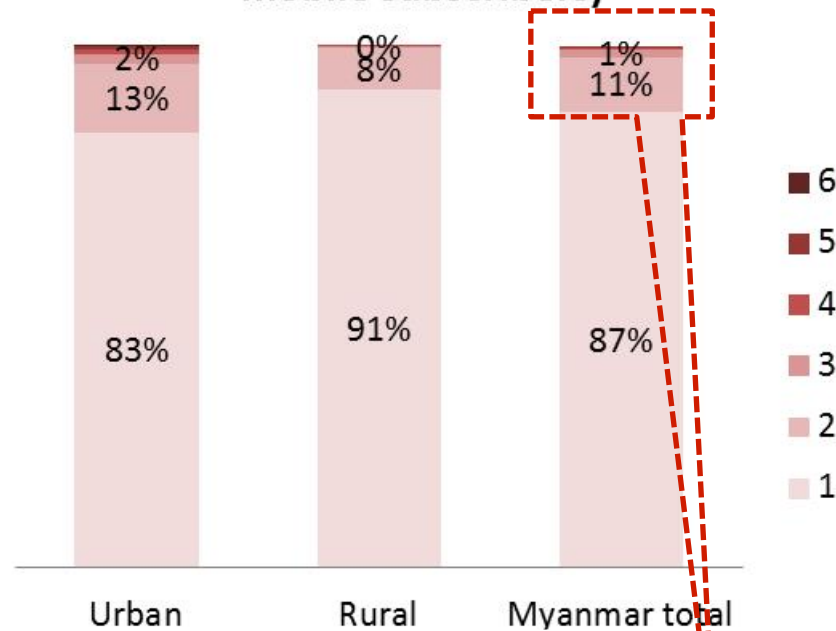
Mobile subscribers (% of 15-65 population)



Q: Which describes your status of mobile phone ownership?

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

Number of active SIMs owned (% of mobile subscribers)

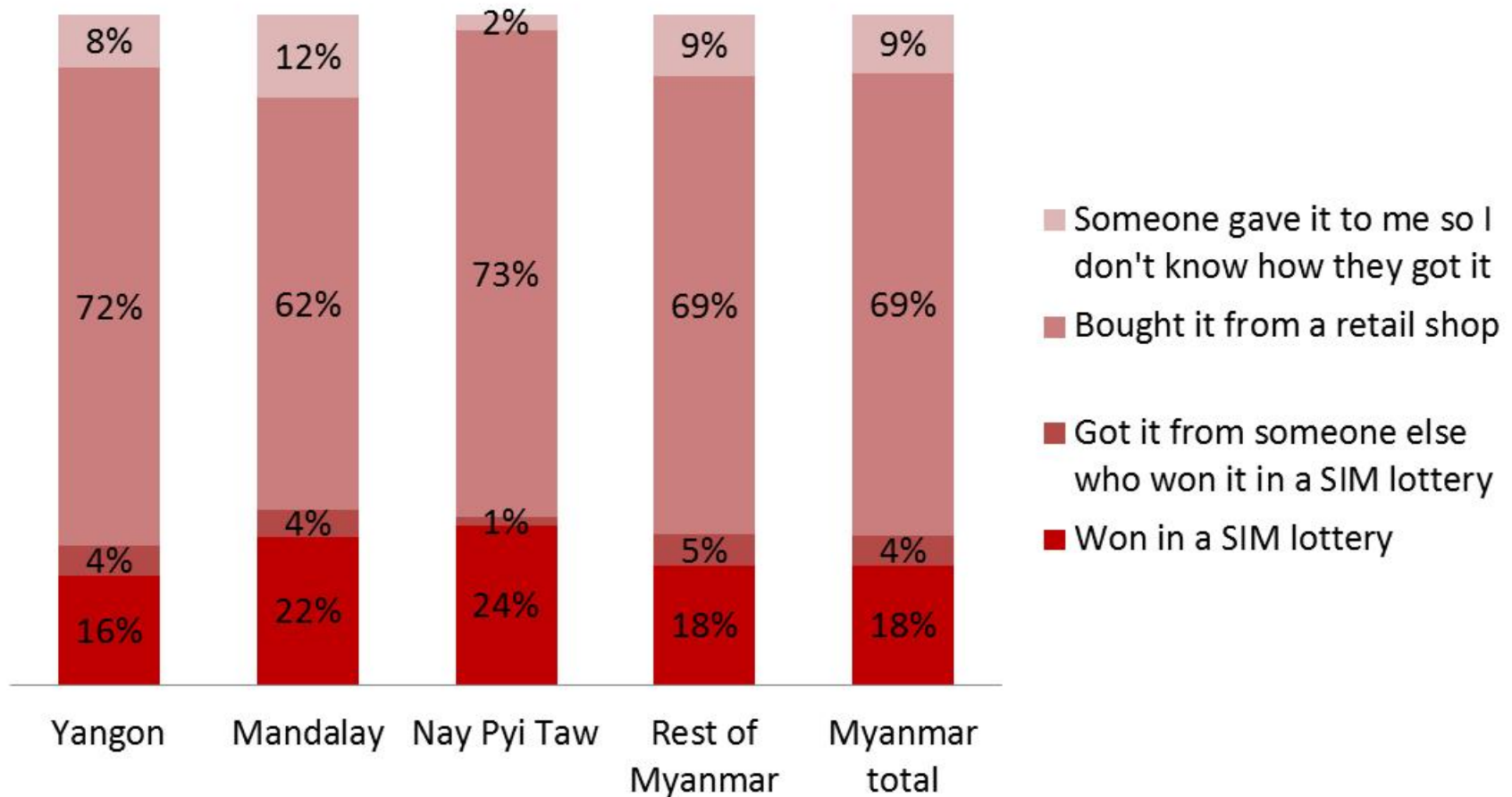


	Urban	Rural	Myanmar total
More than 1 SIM	17%	8%	13%

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

# 18% of subscribers' primary connection obtained via lottery. Majority purchased

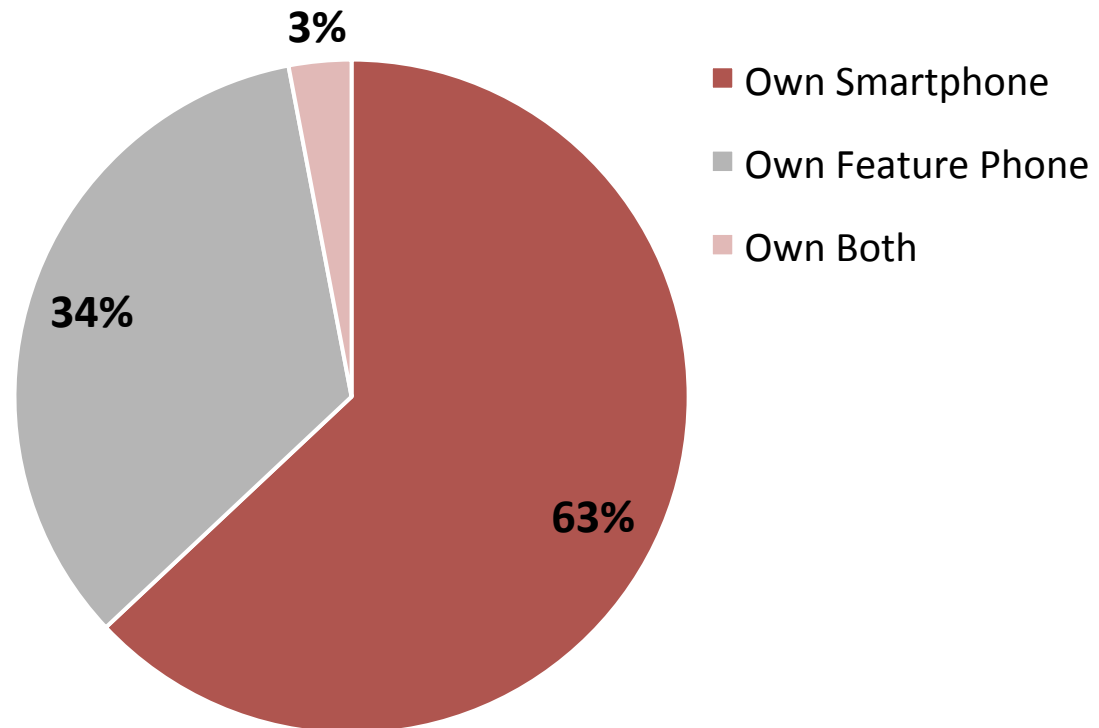
How primary SIM card was obtained (% of mobile owners)



Q: How did you obtain your primary SIM/mobile connection?

# Smartphones dominate: 66% of subscribers have one (a small % also have a feature phone)

Handset Type ( as % of Mobile Subscribers)

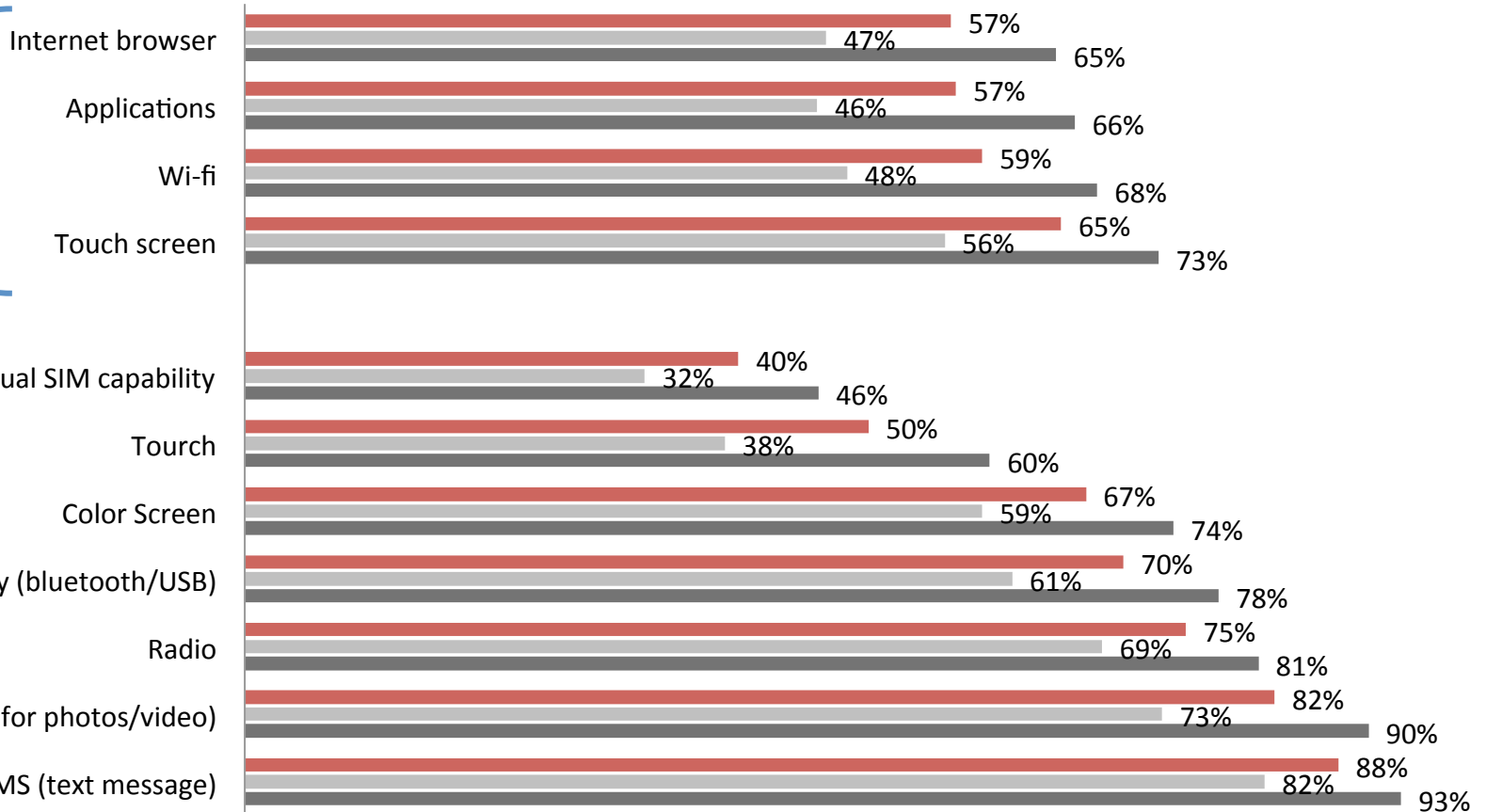


# ...with Internet-ready features

Mobile handset features (% of mobile handset owners)

■ Myanmar total (%) ■ Rural (%) ■ Urban (%)

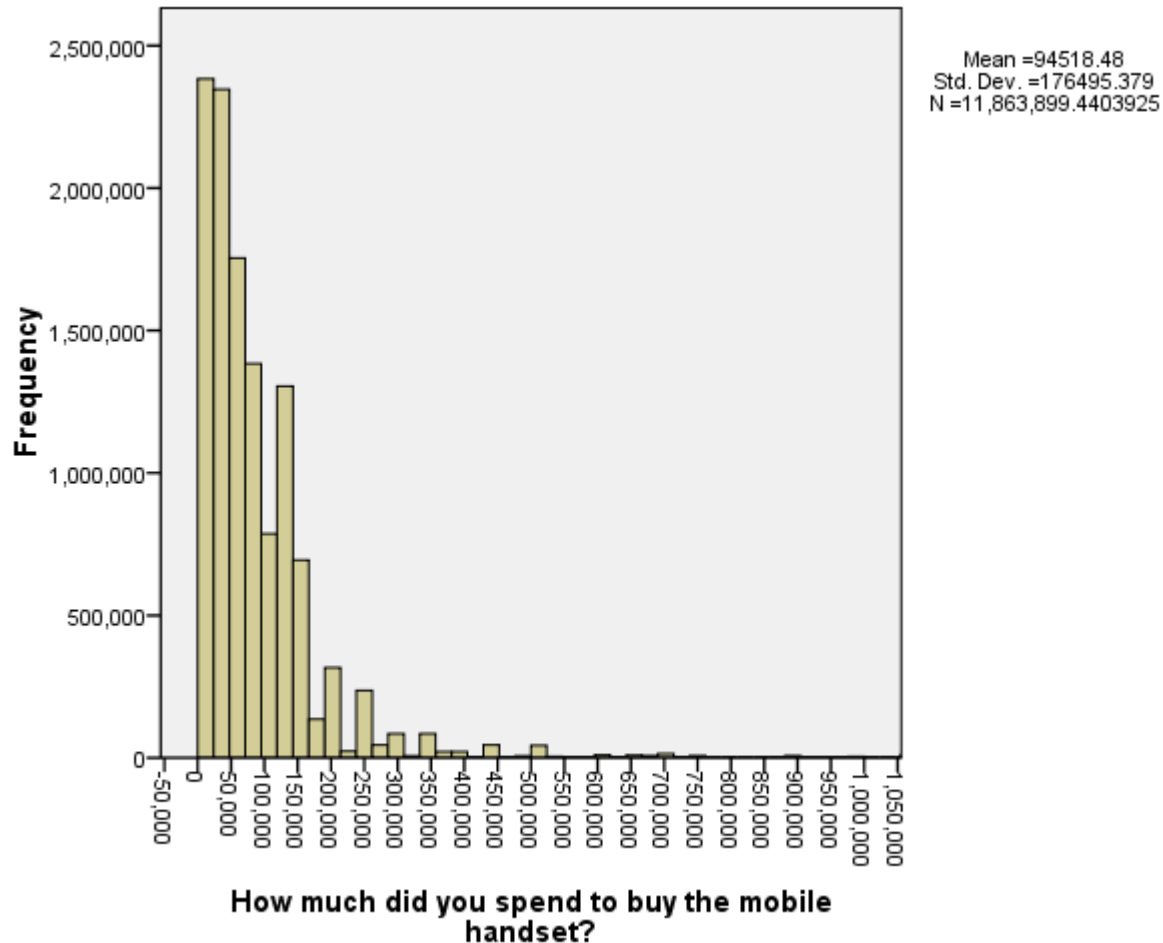
Internet experience related



This slide was updated on 14 August 2015 using re-weighted data; weights were re-calculated with the *detailed* national census data which was released on 29 May 2015.

Q:What are the features your phone has?

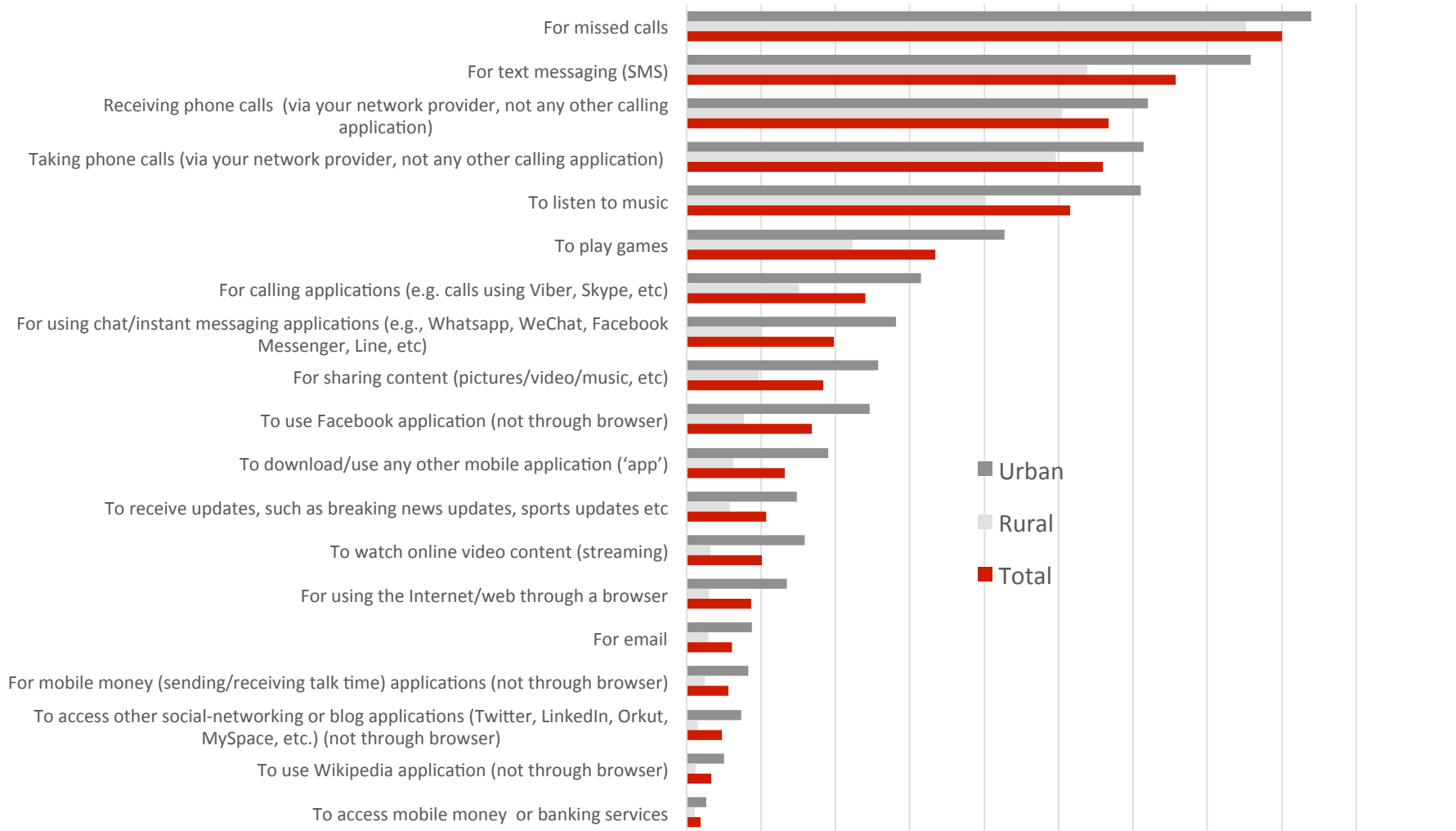
# Mean price paid for handset was MMK 94,500 (approx. USD87); 11% of owners got it free/as a gift



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

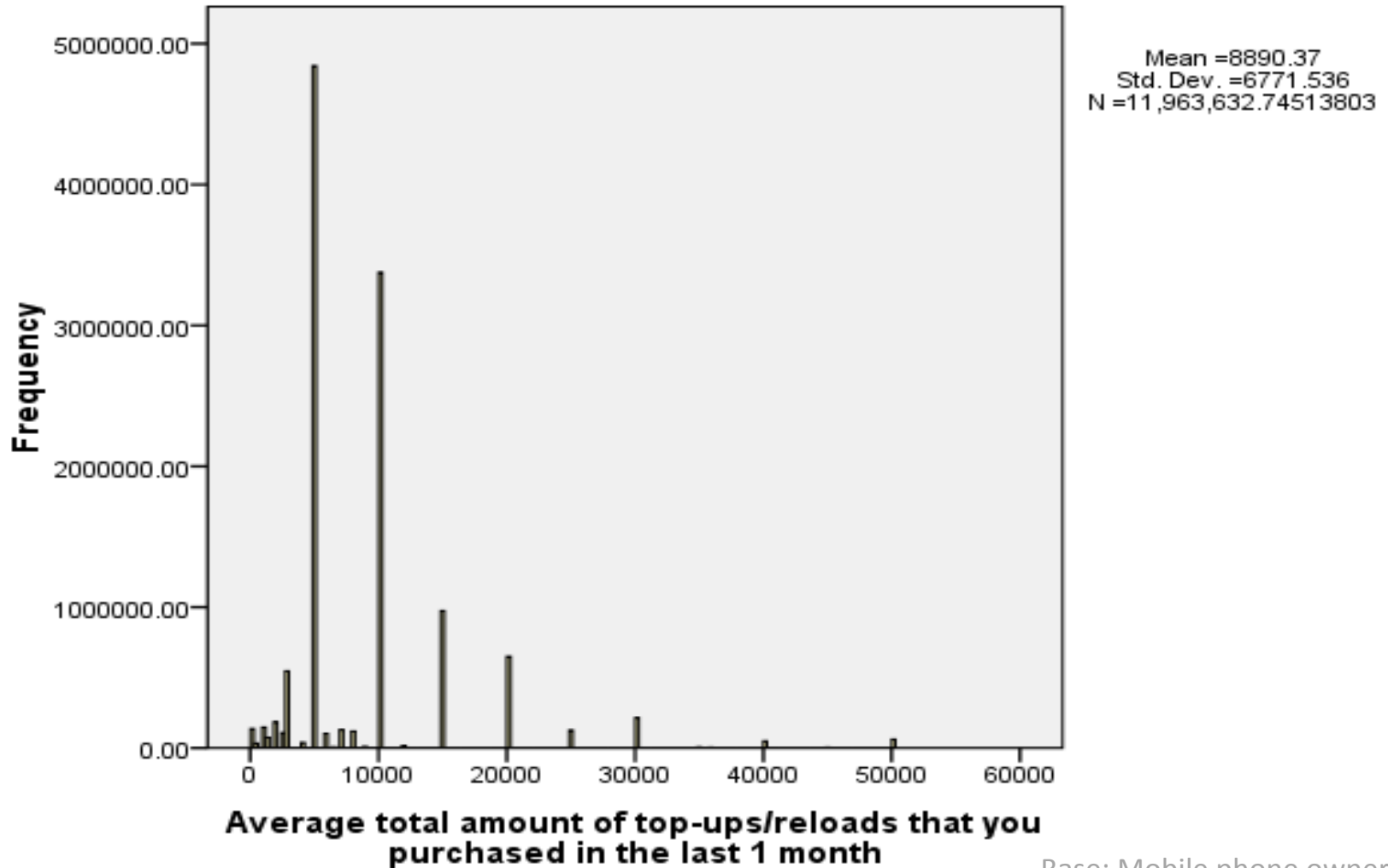
What they do with their mobile (% of mobile subscribers)

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%



Base: All who own a mobile phone

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





Baseline survey findings

# **COMPUTER AND INTERNET USE**

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

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%).

# Test-bed for attractiveness of Zero-Rated content

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%

Baseline survey findings

# **NON-SUBSCRIBERS**

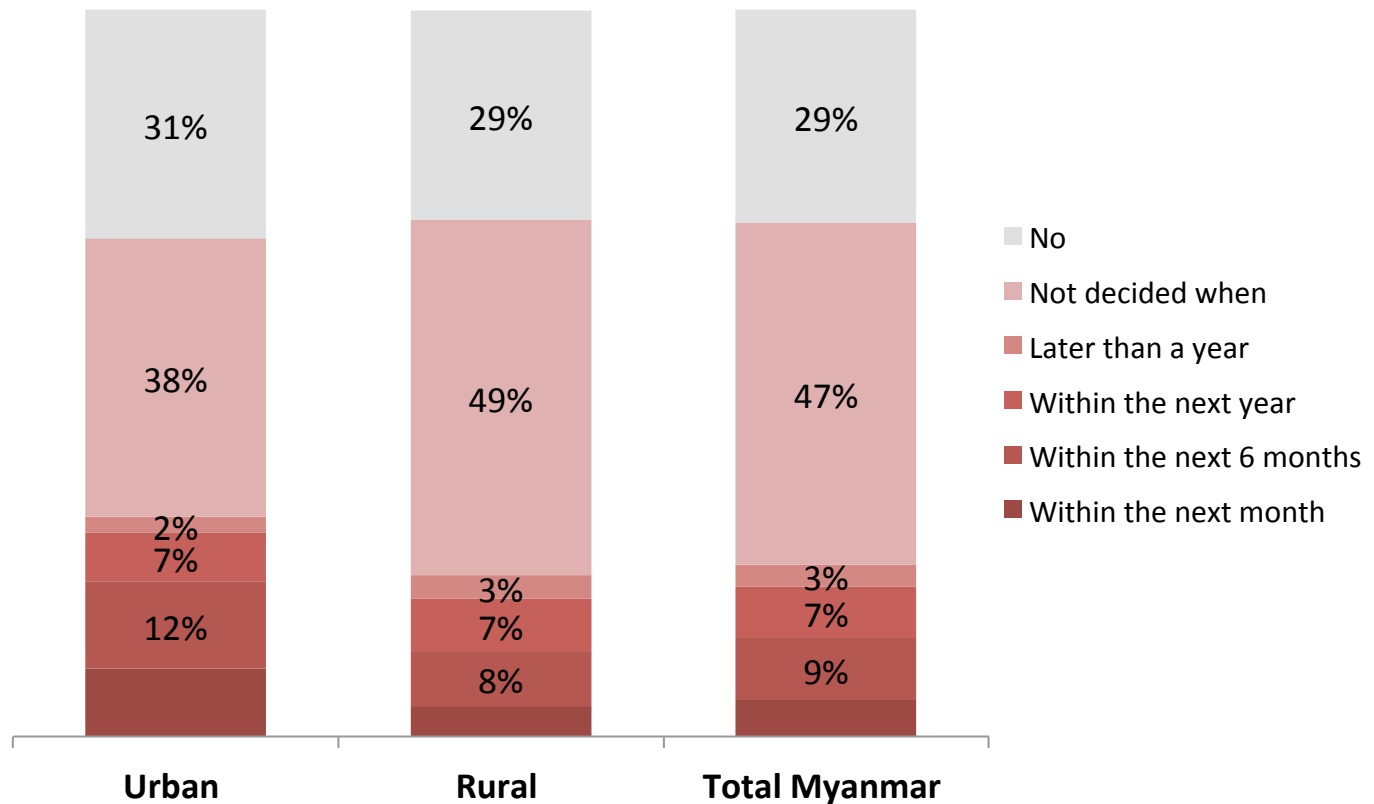
# Affordability and perceived low utility most common reasons for not getting a mobile phone

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 in 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%

# About 50% of non-subscribers expect to purchase handset/SIM in the coming year

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



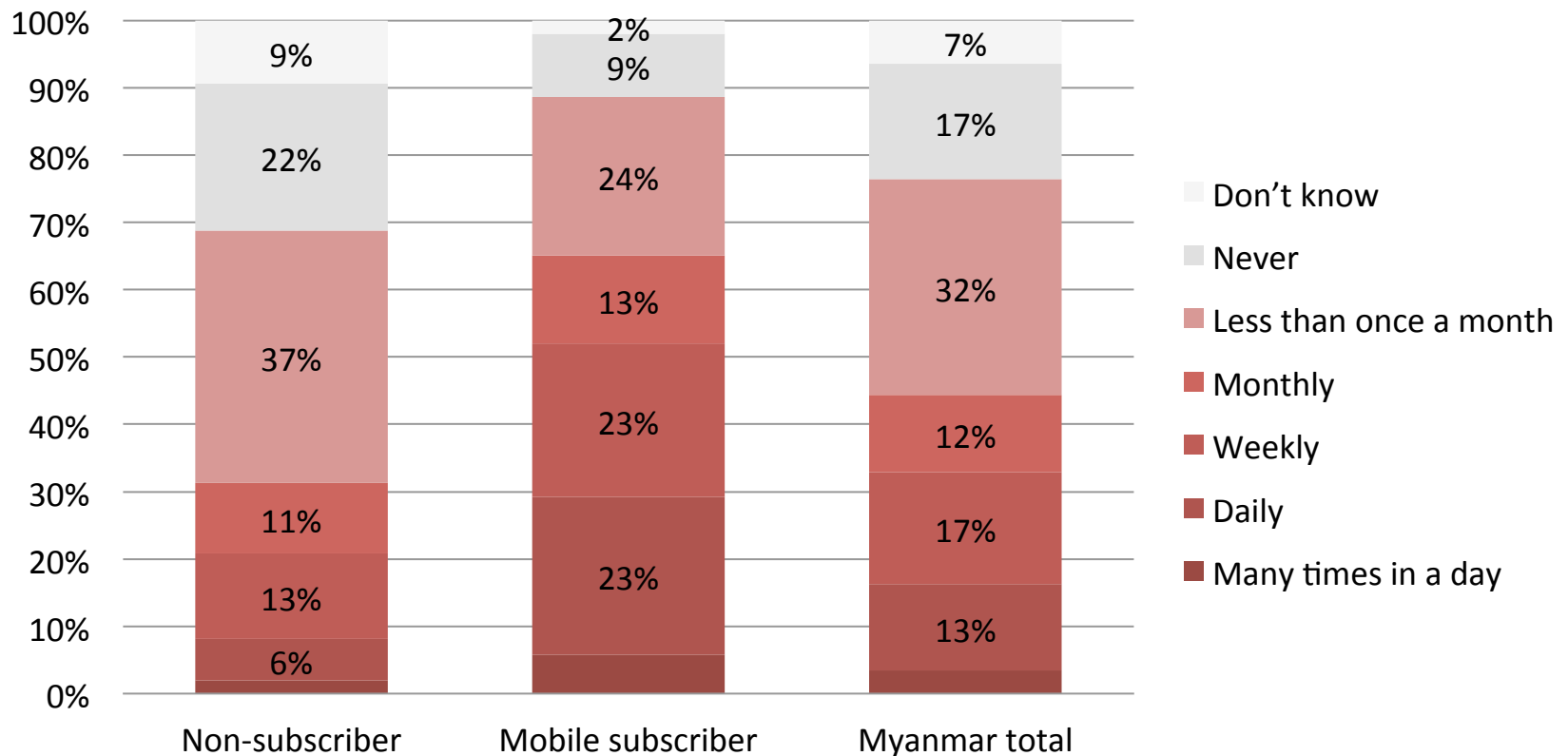
Baseline survey findings

# **COMMUNICATION HABITS AND NEEDS**



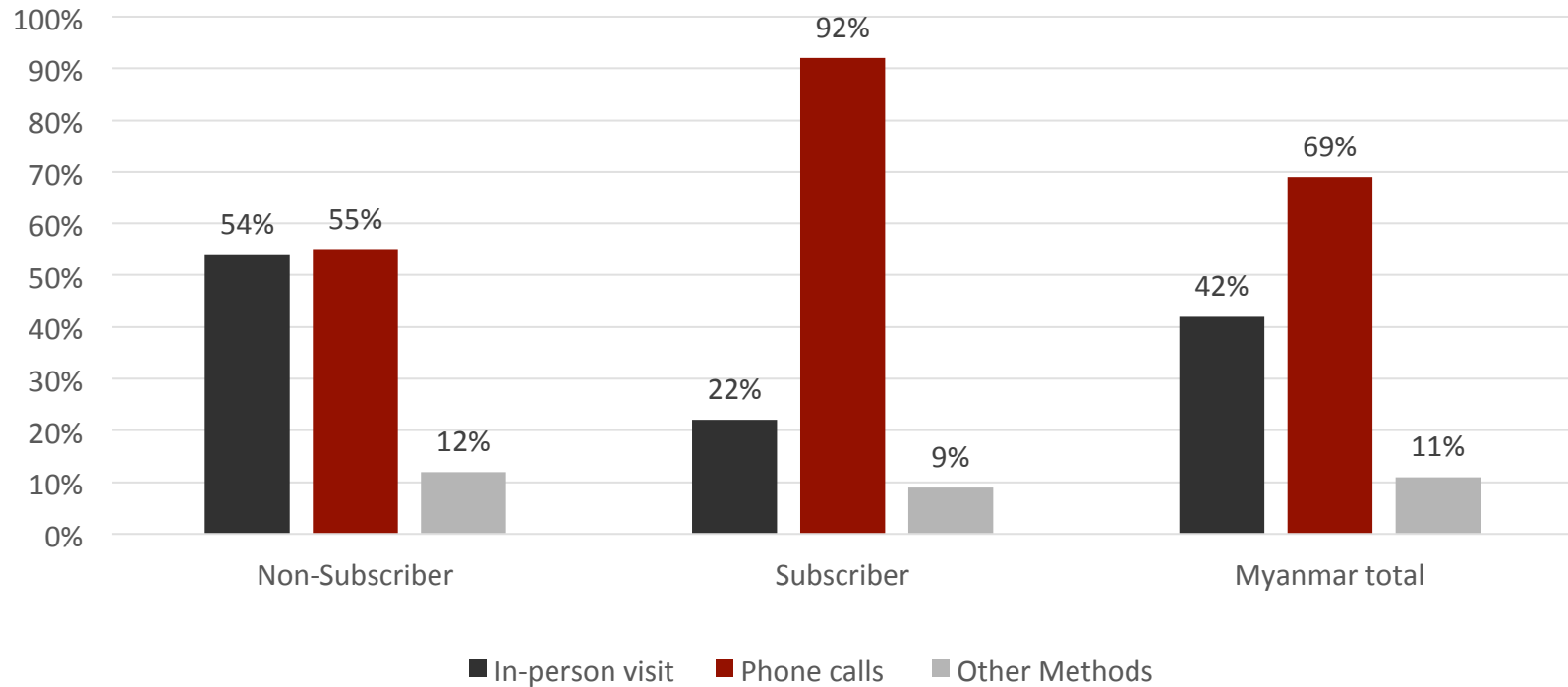
# Most need to communicate with those outside their town/village. Subscribers more frequent communicators

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



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

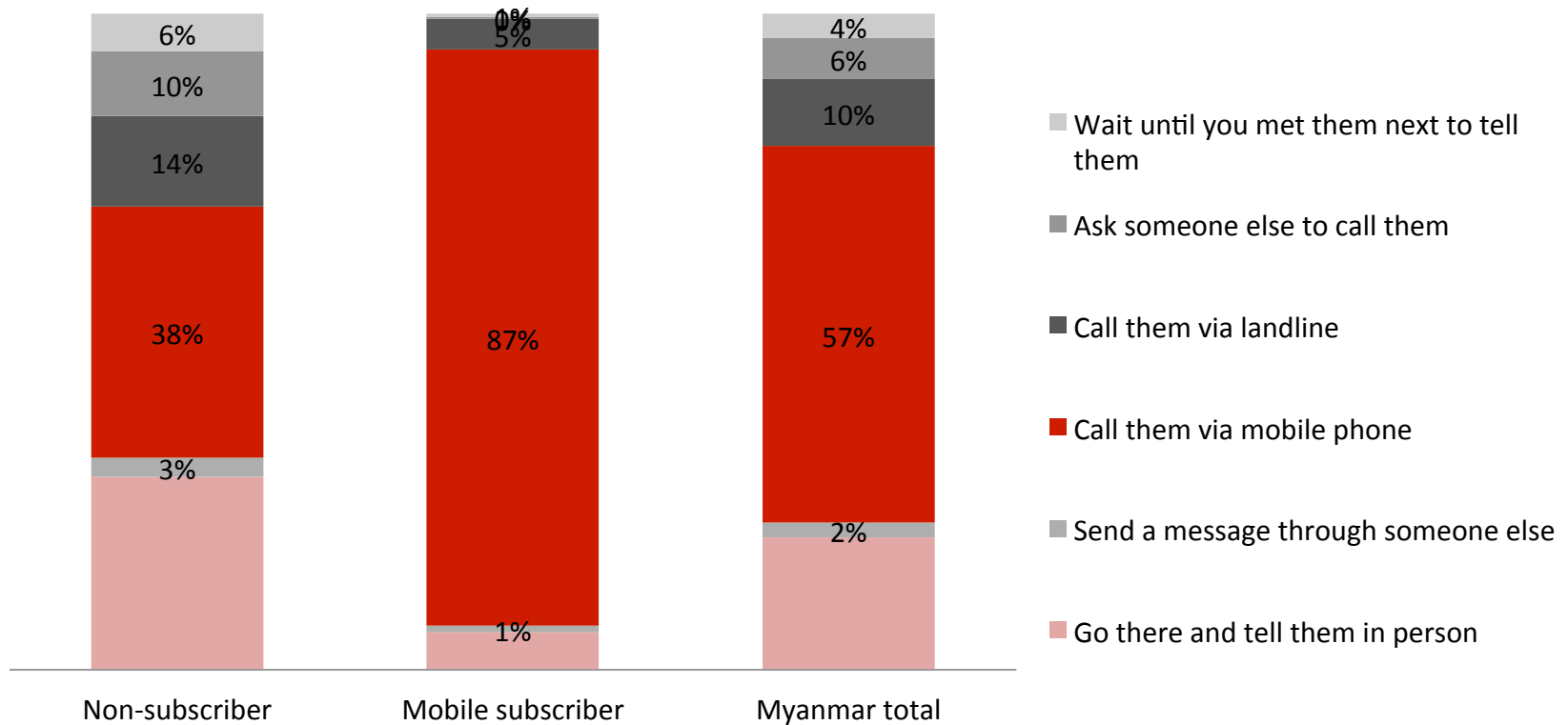
How respondent generally communicates with others outside their town/village (% of those that communicate with people outside town/village)



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# 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)

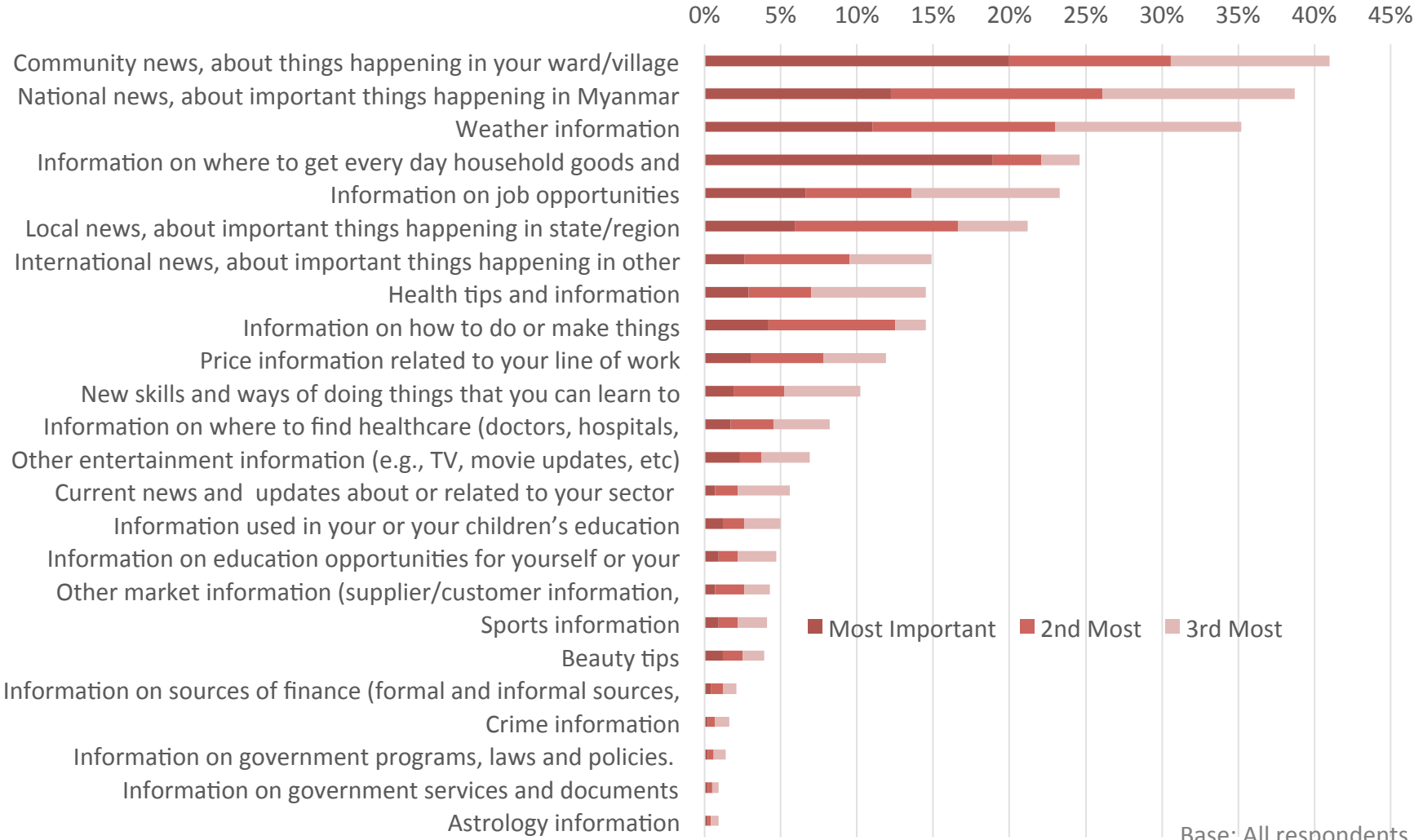


Baseline survey findings

# **INFORMATION NEEDS**

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

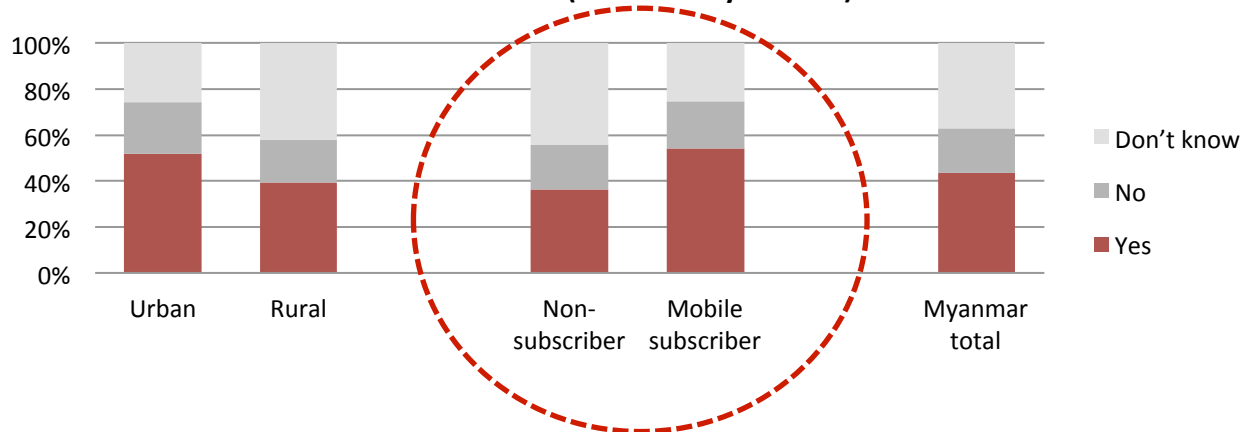
Typical day-to-day Information Needs (As % of 15-65 Population)



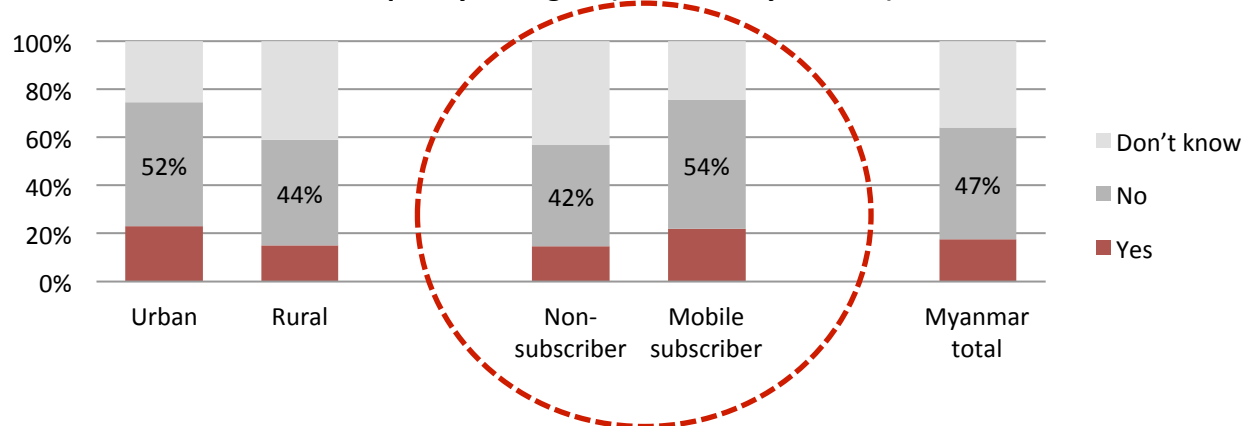
Base: All respondents

# 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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