What do users want?
Data from the "last greenfield market," Myanmar

Rohan Samarajiva

Asia Pacific regional IGF, Macau, 2 July 2015


Pro-poor. Pro-market.

Nationally representative survey on ICT needs and use 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 ±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 ±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
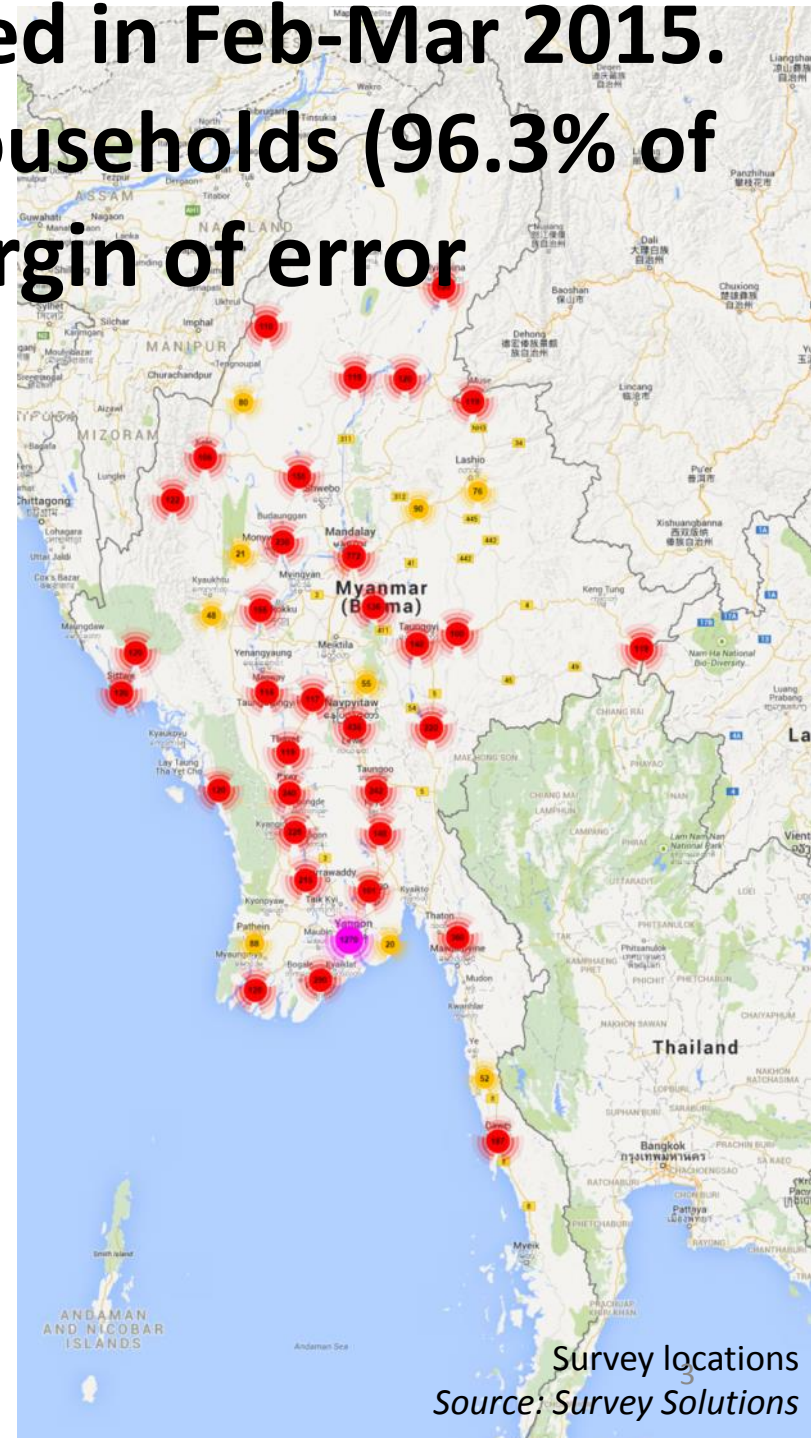
More than 90% of wards/villages reached by wireless signal & have reload locations. Purchase of SIM & handset still limited to urban areas.

		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)

■ Myanmar Total ■ Rural ■ Urban

Category	Myanmar Total	Rural	Urban
Mobile handset	57%	46%	83%
Active mobile SIM	58%	46%	84%
Fixed phone	5%	4%	10%
Desktop computer	1%	0%	4%
Notebook, laptop computer	2%	0%	10%
Tablet computer	1%	0%	4%
Internet connection (excluding. via mobile phone)	2%	1%	3%
Television	52%	38%	82%
Radio/cassette player	18%	21%	11%
CD/ DVD/ EVD/ Blue Rays Disc Player	44%	32%	73%

Base: All households

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)

Urban
- 1%
- 3%
- 3%
- 5%
- 19%
- 70%

Rural
- 6%
- 3%
- 12%
- 16%
- 31%
- 31%

Myanmar total
- 5%
- 2%
- 9%
- 12%
- 27%
- 46%

Legend:
- Other
- My work place / Office phone/employer
- A neighbor (can include friend or relative)
- A friend's or relative (who is not a neighbor)
- Roadside booths, private pay phone booths)
- Another household member
- The household (common phone)
- Me (personal phone)

Base: Respondents who had ever used a phone before
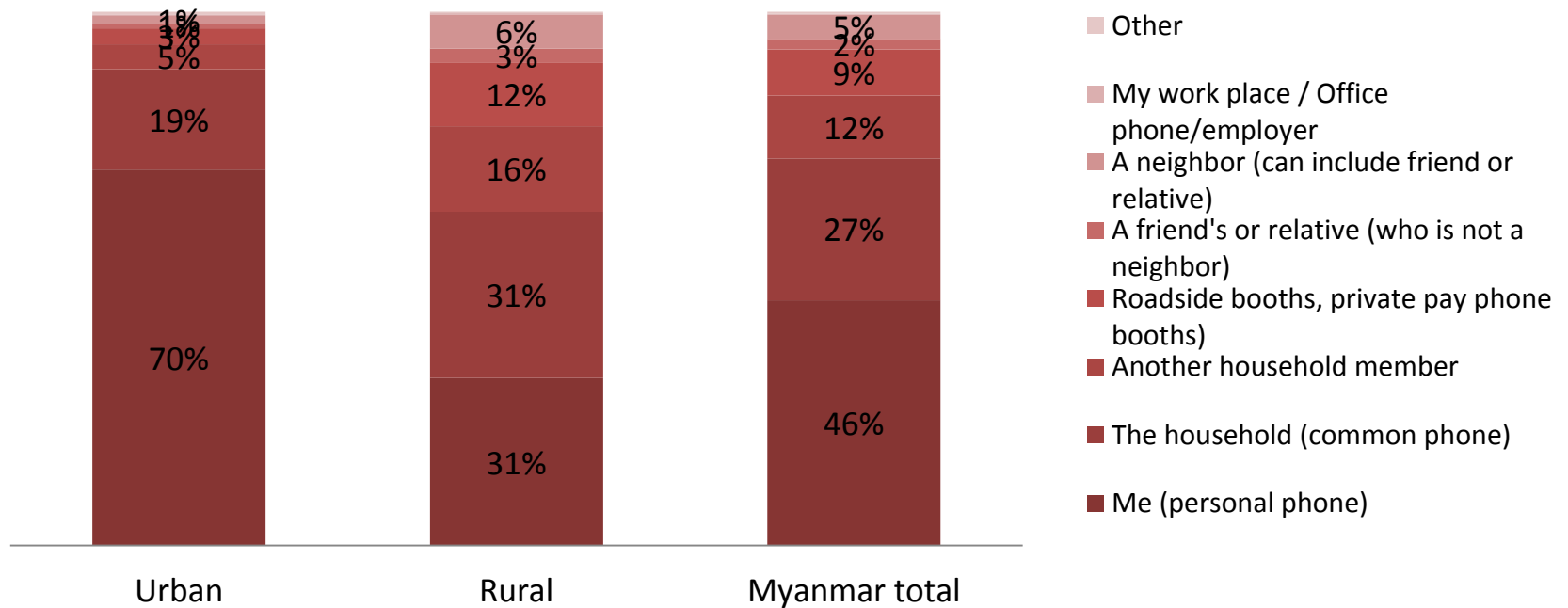
Adoption driven by big cities; Gender gap exists; No 'obvious' ageism

Mobile subscribers (% of 15-65 year olds)

- Yangon: 83%
- Mandalay: 55%
- Nay Pyi Taw: 55%
- Rest of Myanmar: 31%
- Myanmar total: 38%
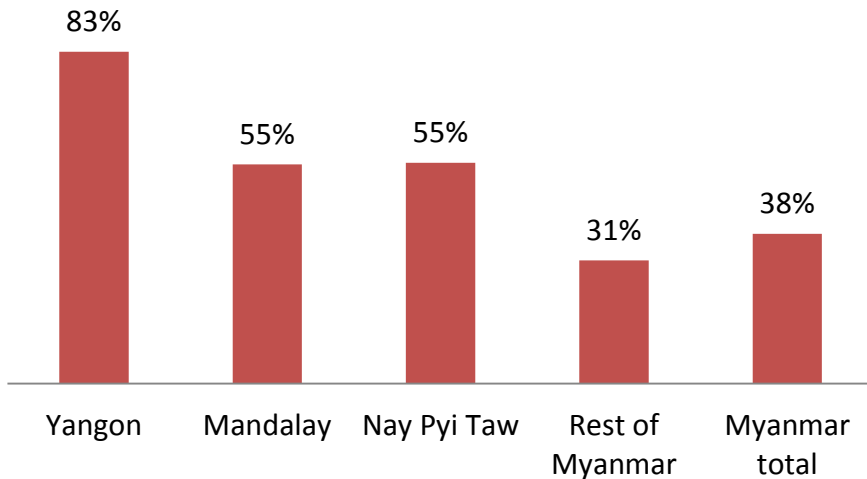
Mobile subscribers by Gender (% of 15-65 year olds)

- Male: 45%
- Female: 32%
- Myanmar total: 38%
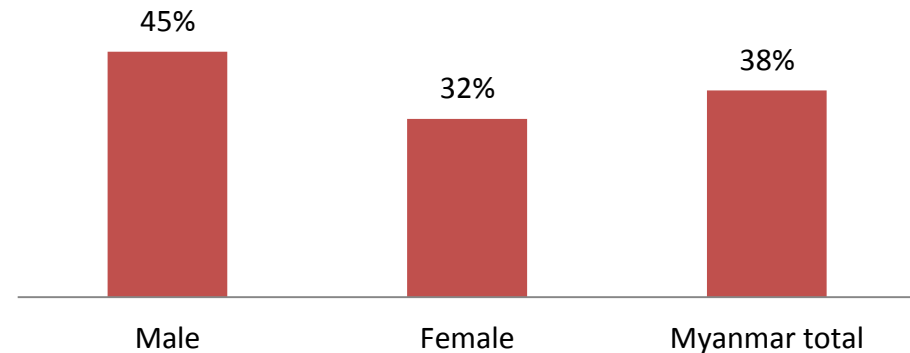
Mobile subscribers by age (% of 15-65 yr olds)

- 15 - 24 years: 38%
- 25 - 34 years: 40%
- 35 - 44 years: 42%
- 45 - 54 years: 36%
- 55 - 65 years: 30%
- Myanmar total: 38%

Base: All respondents

Smartphones dominate

Handset type (% of mobile subscribers)

Own none 2%

Own feature phone 36%

Own smartphone 59%

Own both 3%
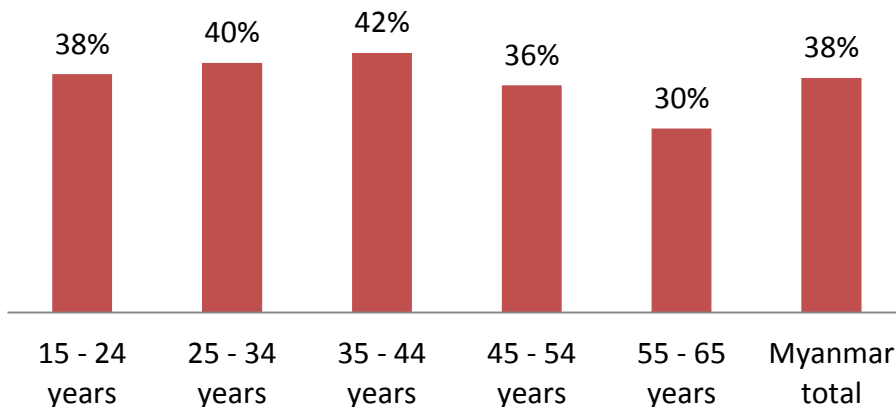
Base: Mobile SIM subscribers
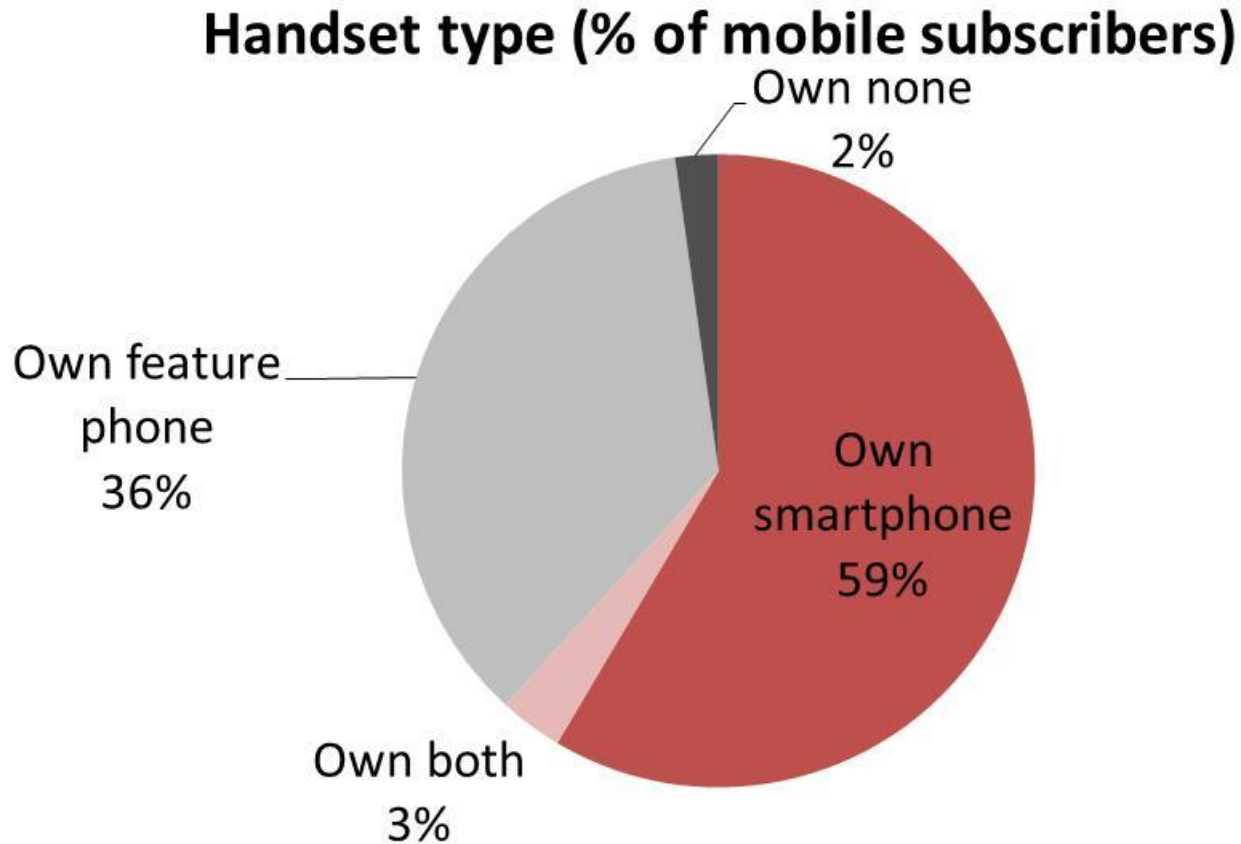
Mobile for voice, SMS, missed calls, music, games

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

Base: Those who own a mobile handset
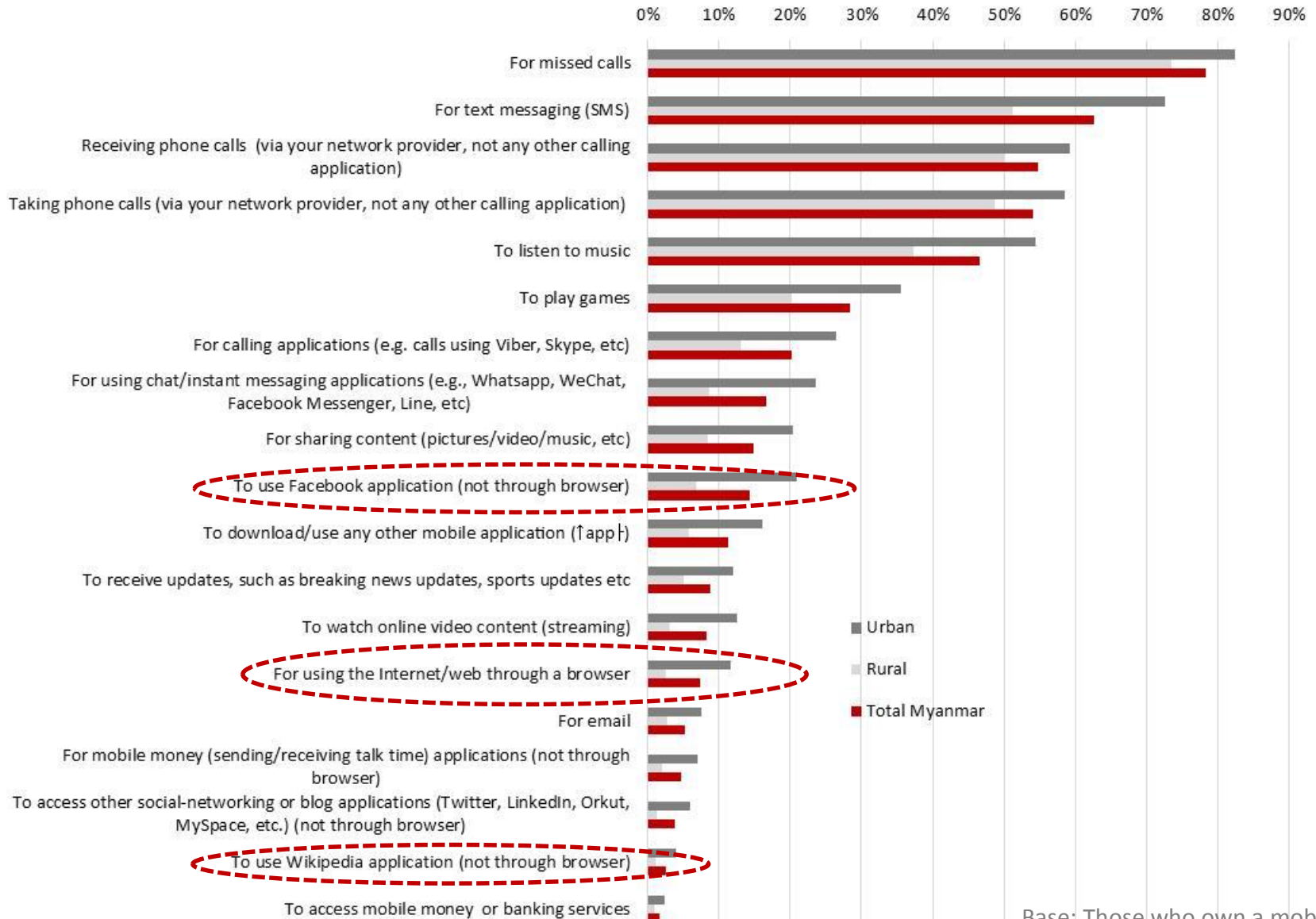
Computer and Internet (via browser) use very low

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

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)

Leisure/entertainment
- Other entertainment information (e.g., TV, movie updates, etc)
- Beauty tips
- Astrology information
- Crime information
- Sports information

Education/health
- Health tips and information
- Information on where to find healthcare (doctors, hospitals, medications etc
- Information used in your or your children's education
- Information on education opportunities for yourself or your children

Government
- Information on government programs, laws and policies.
- Information on government services and documents

Livelihood/job
- Information on sources of finance (formal and informal sources, the cost involved,…
- Current news and updates about or related to your sector
- New skills and ways of doing things that you can learn to enhance your earning…
- Other market information (supplier/customer information, market locations, etc)
- Price information related to your line of work (e.g., market prices for your…
- Information on job opportunities

General
- Weather information
- International news, about important things happening in other countries
- National news, about important things happening in Myanmar
- Local news, about important things happening in your state/region
- Community news, about things happening in your ward/village
- Information on how to do or make things
- Information on where to get every day household goods and services and how…

0% 5% 10% 15% 20% 25% 30% 35% 40% 45%

■ Most Important ■ 2nd Most ■ 3rd Most

11

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)

Legend: Don't know, No, Yes

Urban	Rural	Non-subscriber	Mobile subscriber	Myanmar total
52%	39%	37%	54%	43%

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

Legend: Don't know, No, Yes

Urban	Rural	Non-subscriber	Mobile subscriber	Myanmar total
52%	44%	42%	54%	47%

Base: All respondents