What to people in Myanmar do with ICTs? Results of field research

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NATIONALLY REPRESENTATIVE BASELINE SURVEY ON ICT NEEDS AND USAGE IN MYANMAR

Nationally representative survey, Feb-May 2015

- 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-May 2015 by CAPI from
  - 8,138 households
    - household level questionnaire (from household head)
    - individual level questionnaire (one individual, randomly selected, aged 15-65)
  - 420 'clusters' (urban=wards; rural=village tracts)
    - Cluster characteristics
    - Mobile network quality (using software on a mobile phone)
    - Retail prices of 20 household essentials (rice, gram, coconuts, etc.)
    - 554 ward/village leaders surveyed

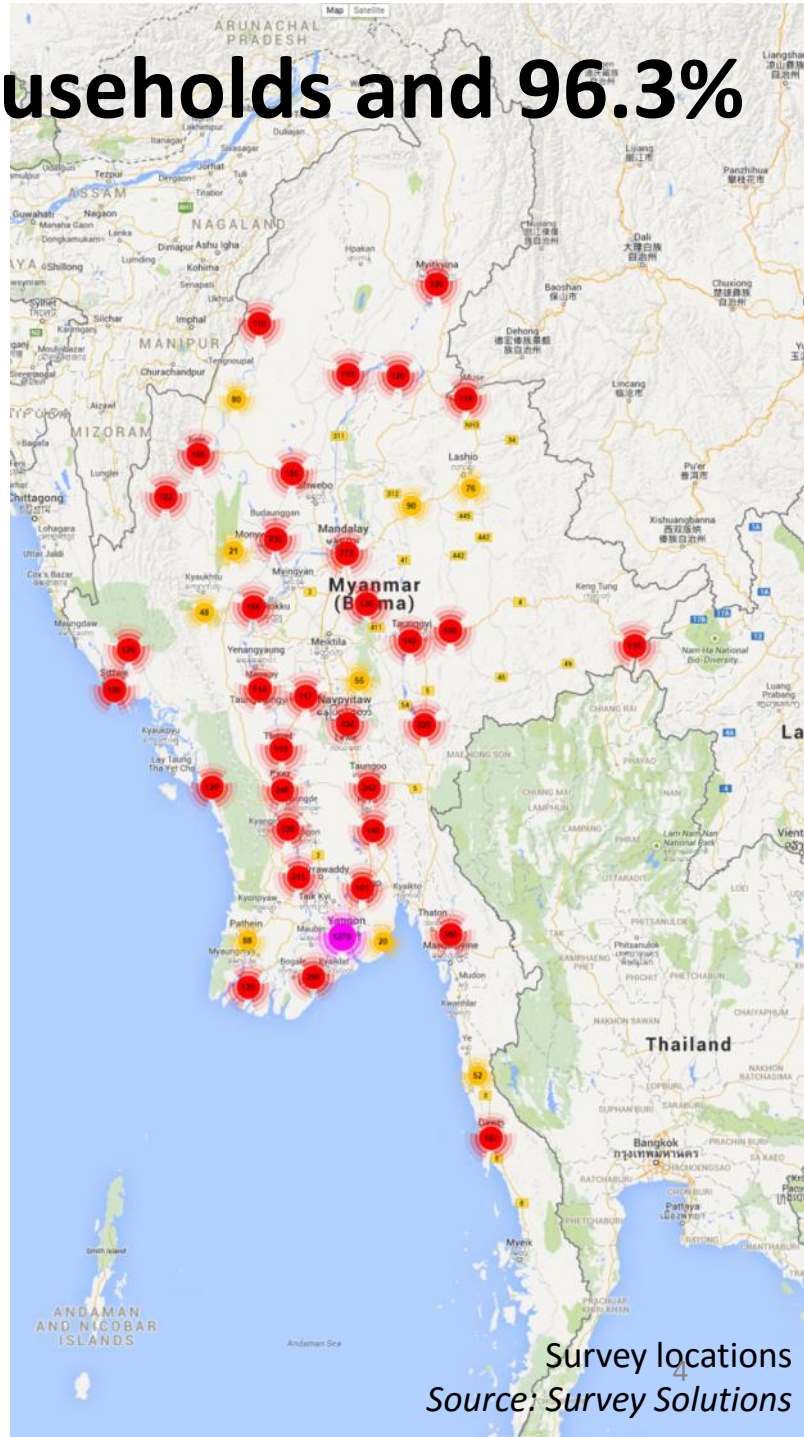
Representative of 97% of households and 96.3% of population aged 15 - 65

- 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/projects/2012-2014-research-program/responding-to-the-policy-window-in-myanmar-to-help-lay-foundation-for-inclusion/btr/dm/

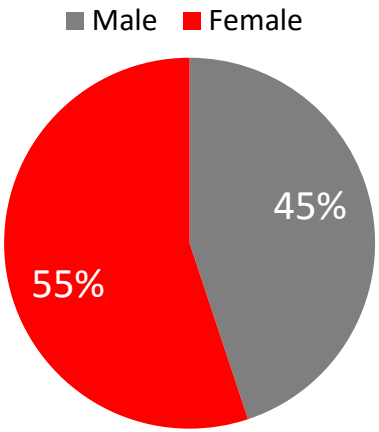


Survey locations
Source: Survey Solutions

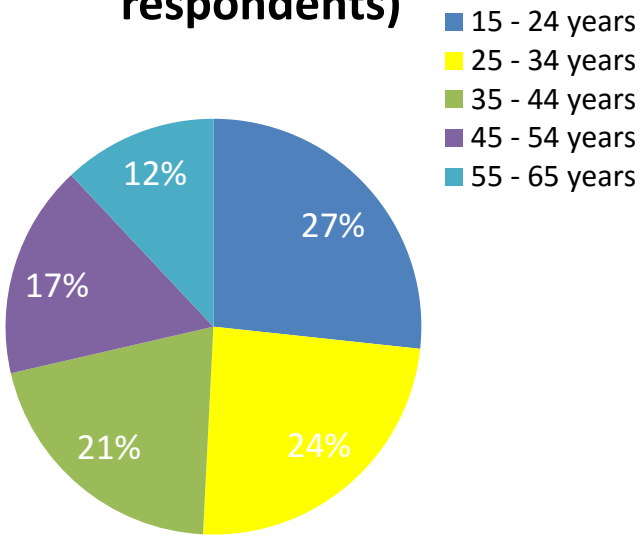
Baseline survey findings

SAMPLE PROFILE

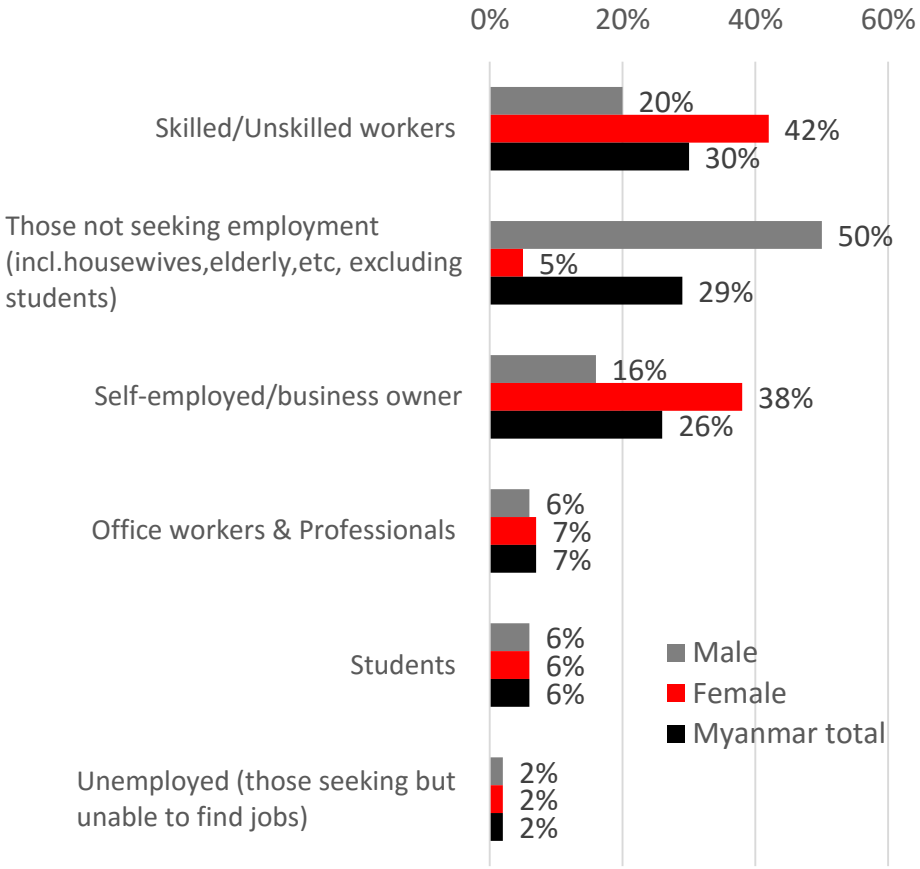
Sample gender composition (% respondents)



Sample age distribution (% of respondents)

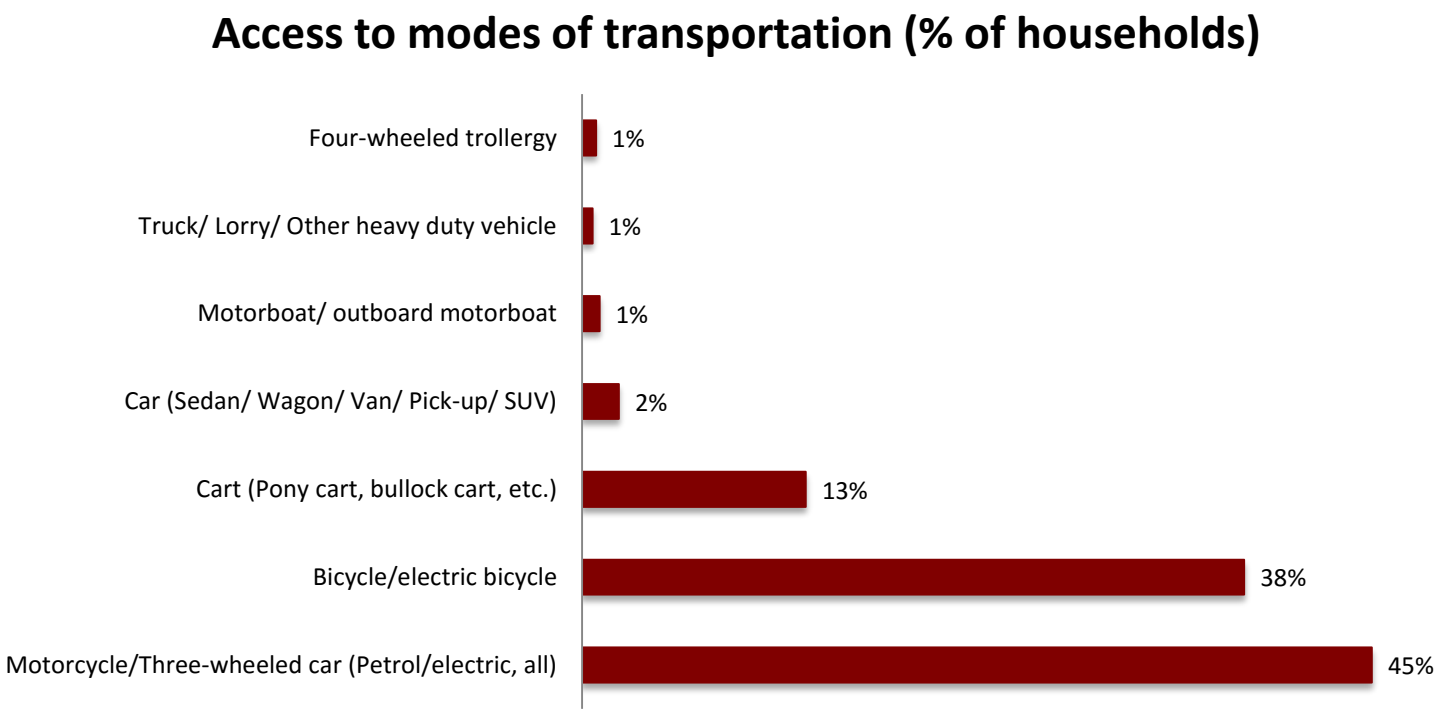


Occupation (as % of population aged between 15-65)



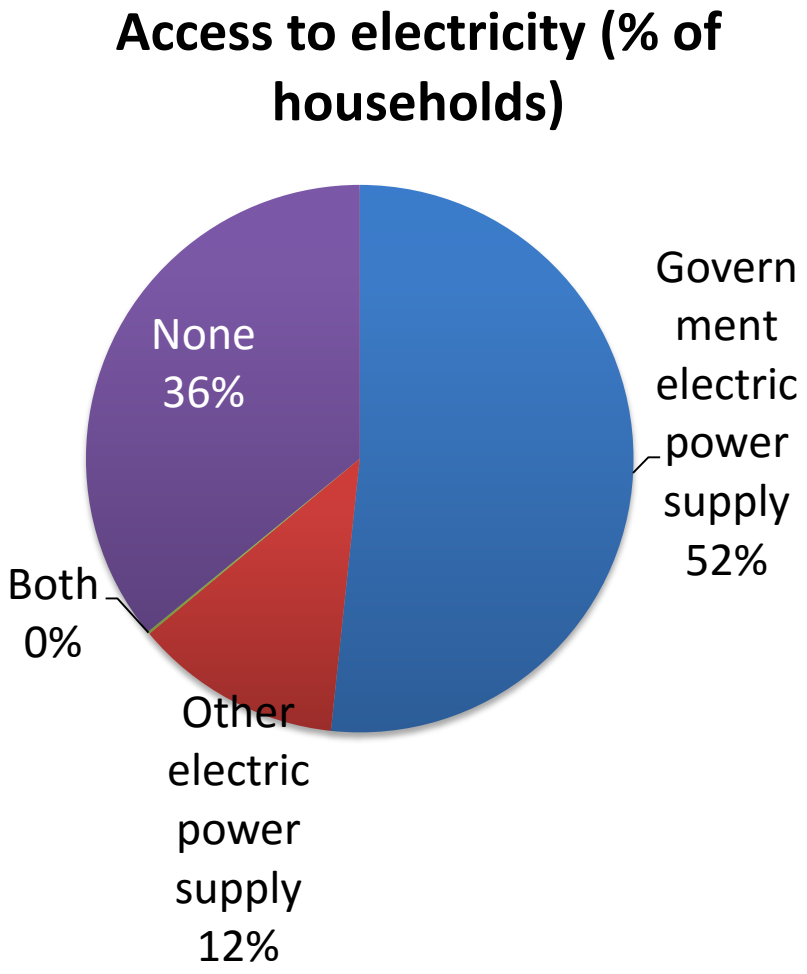
Base: All aged 15-65 respondents selected by Kish grid

Motorcycles, three-wheeled cars and bicycles dominate

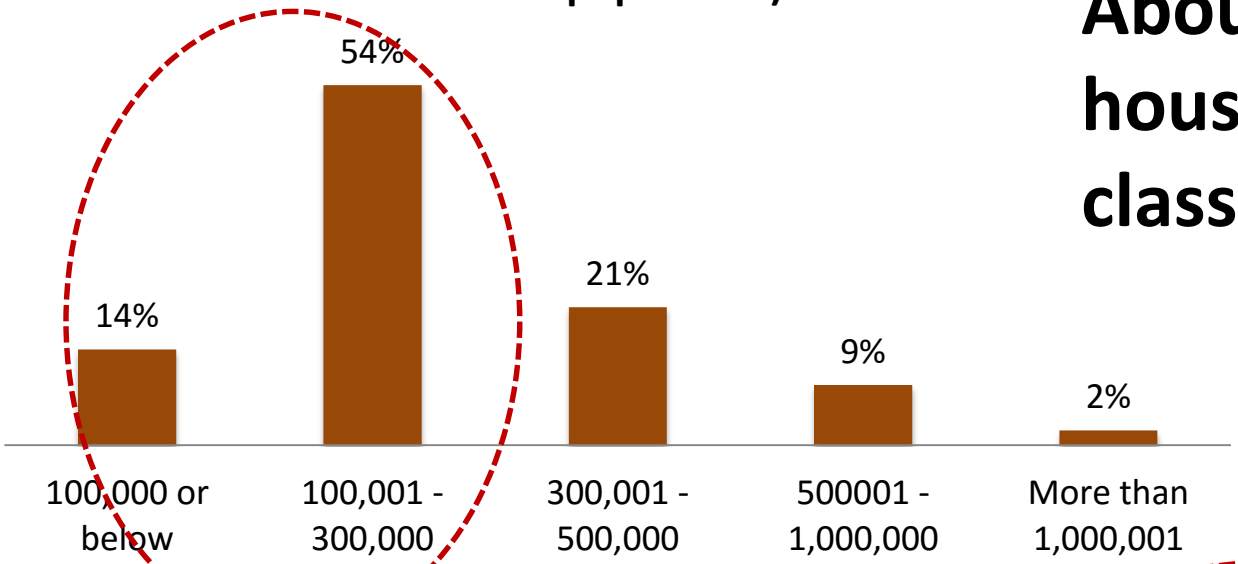


Base: All households surveyed

64% households have access to some form of electricity



Total monthly household expenditure (MMK) (% of 15-65 population)



About 70% of the households were classified as "poor"

Income in Kyats/month	SEC
100,000 or below	E
100,001 - 200,000	D
200,001 - 300,000	
300,001 - 400,000	C
400,001 - 500,000	
500,001 - 600,000	B
600,001 - 700,000	
700,001 - 800,000	
800,001 - 900,000	
900,001 - 100,0000	
over 1,000,000	A

Referred to as "the poor" or the "Base/Bottom of the Pyramid (BOP)" or "those from low-spending households" in this survey

Baseline survey findings

USE OF MOBILE PHONES

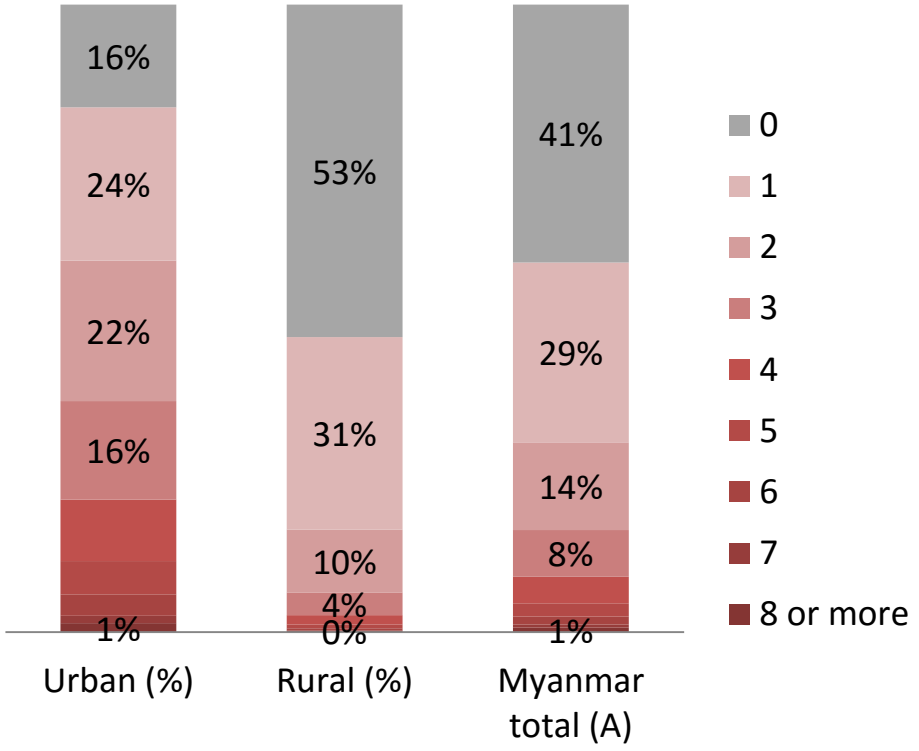
More than 90% of wards/villages got a mobile signal and re-load locations. But purchase of SIM and handset was limited to urban areas

		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%

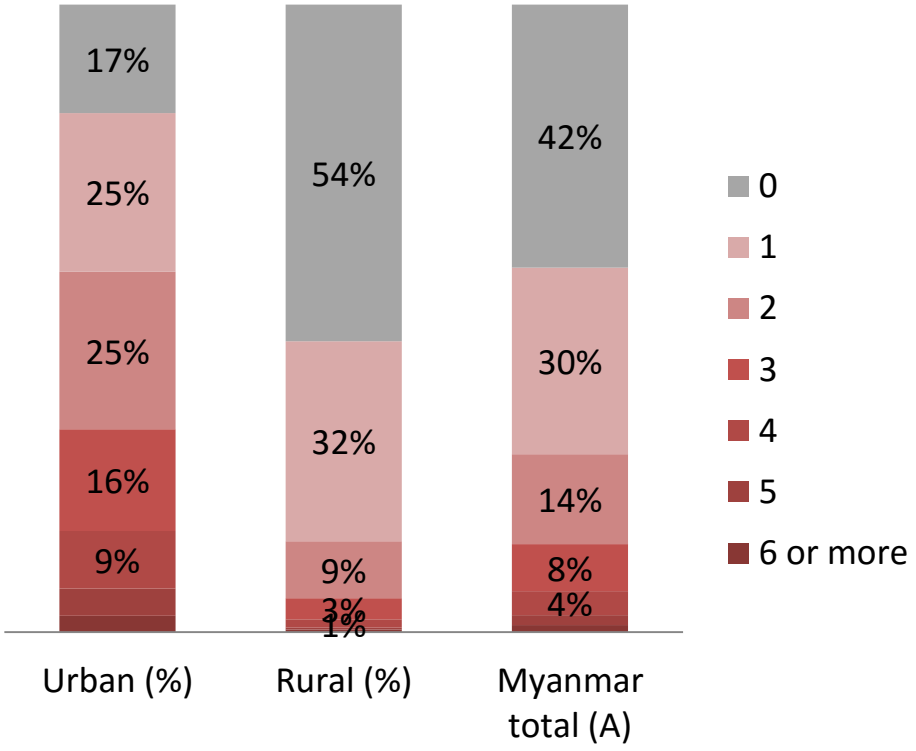
Base: Ward/Village representatives

Almost 60% of households had at least 1 mobile phone among members; almost 30% have more than 1

Number of active SIMs among household members (% of households)



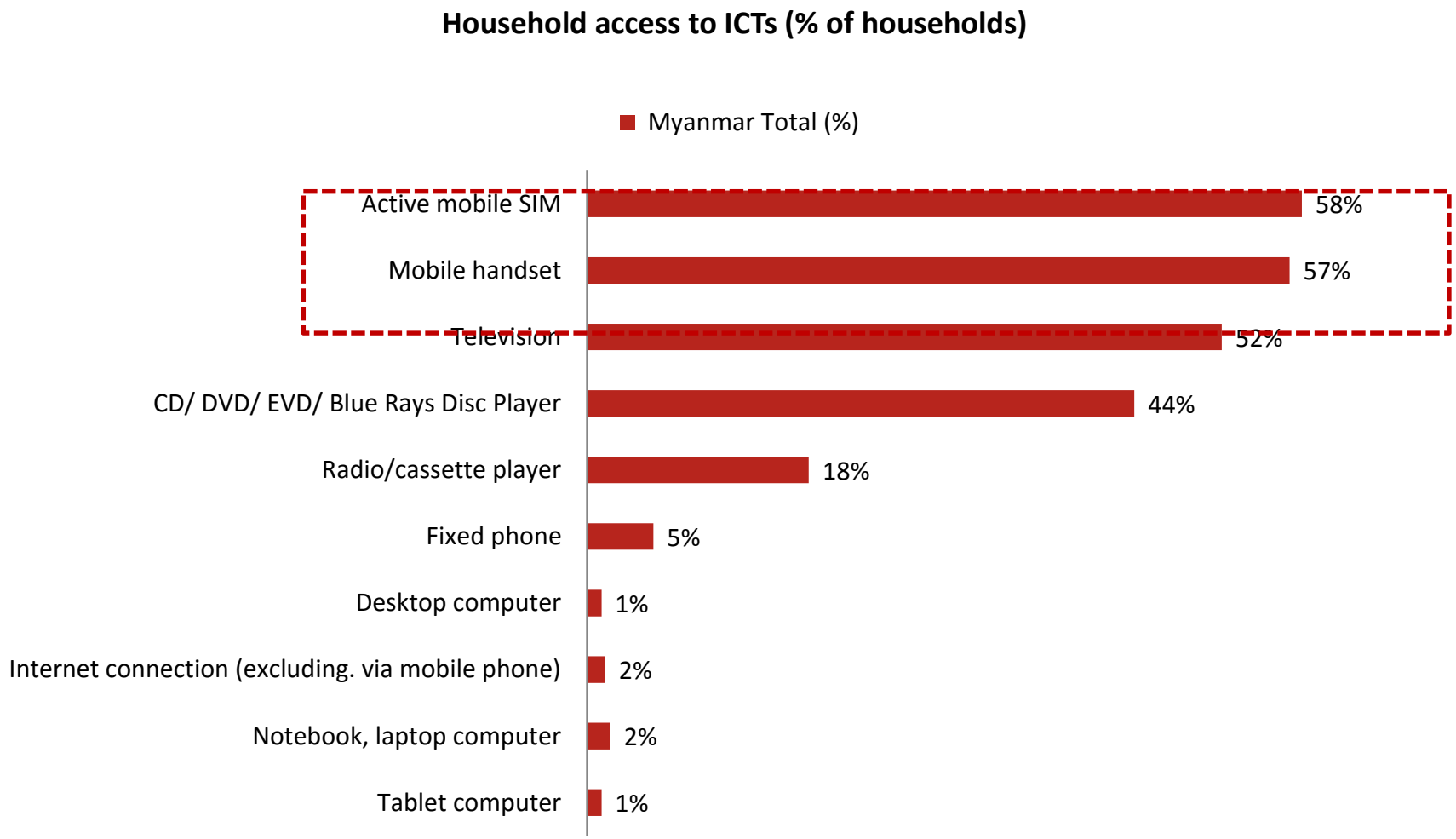
Number of handsets among household members (% of households)



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

Base: All households

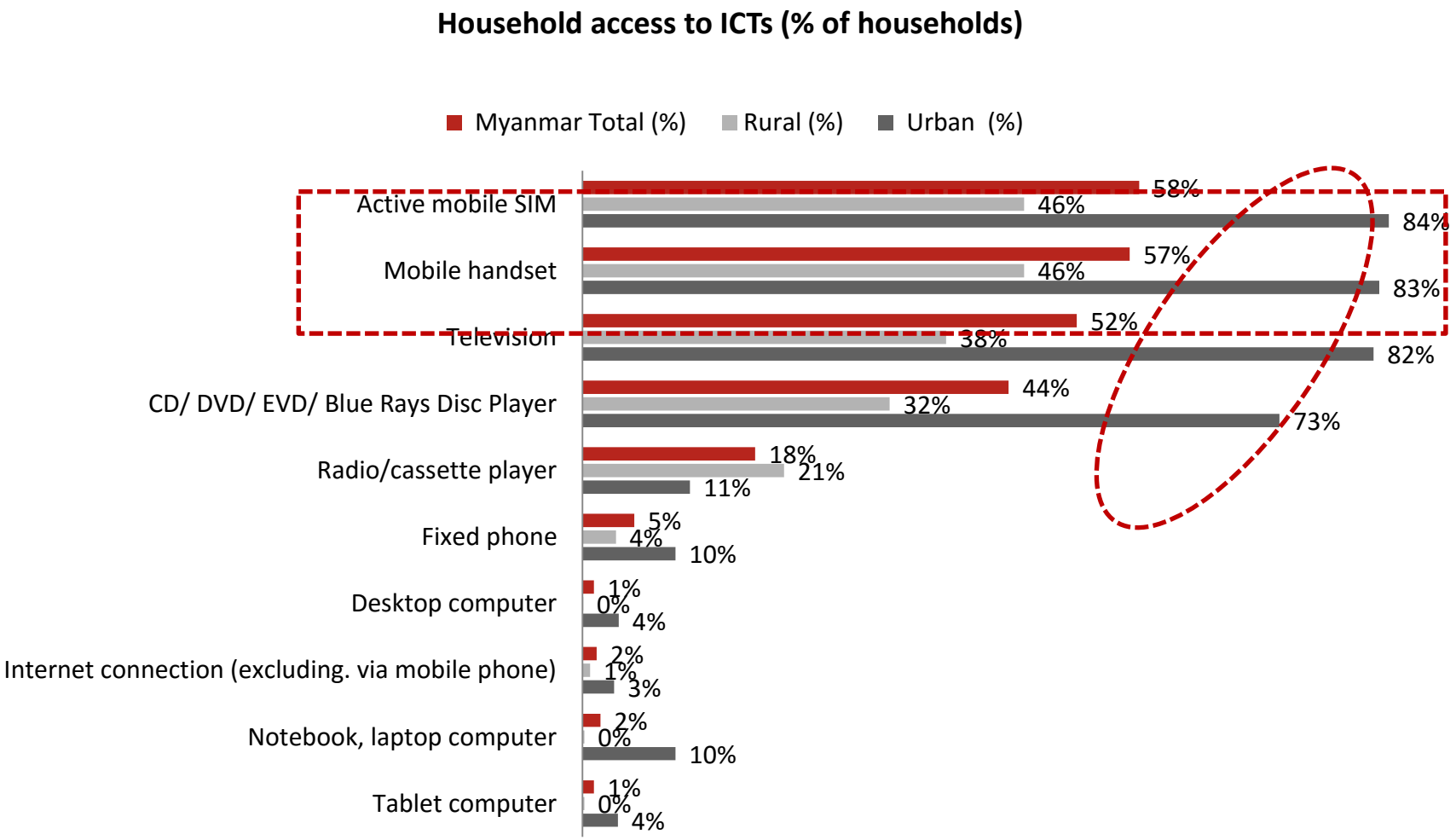
Mobile phones (and SIMs) are the most accessible form of ICTs



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

Base: All households

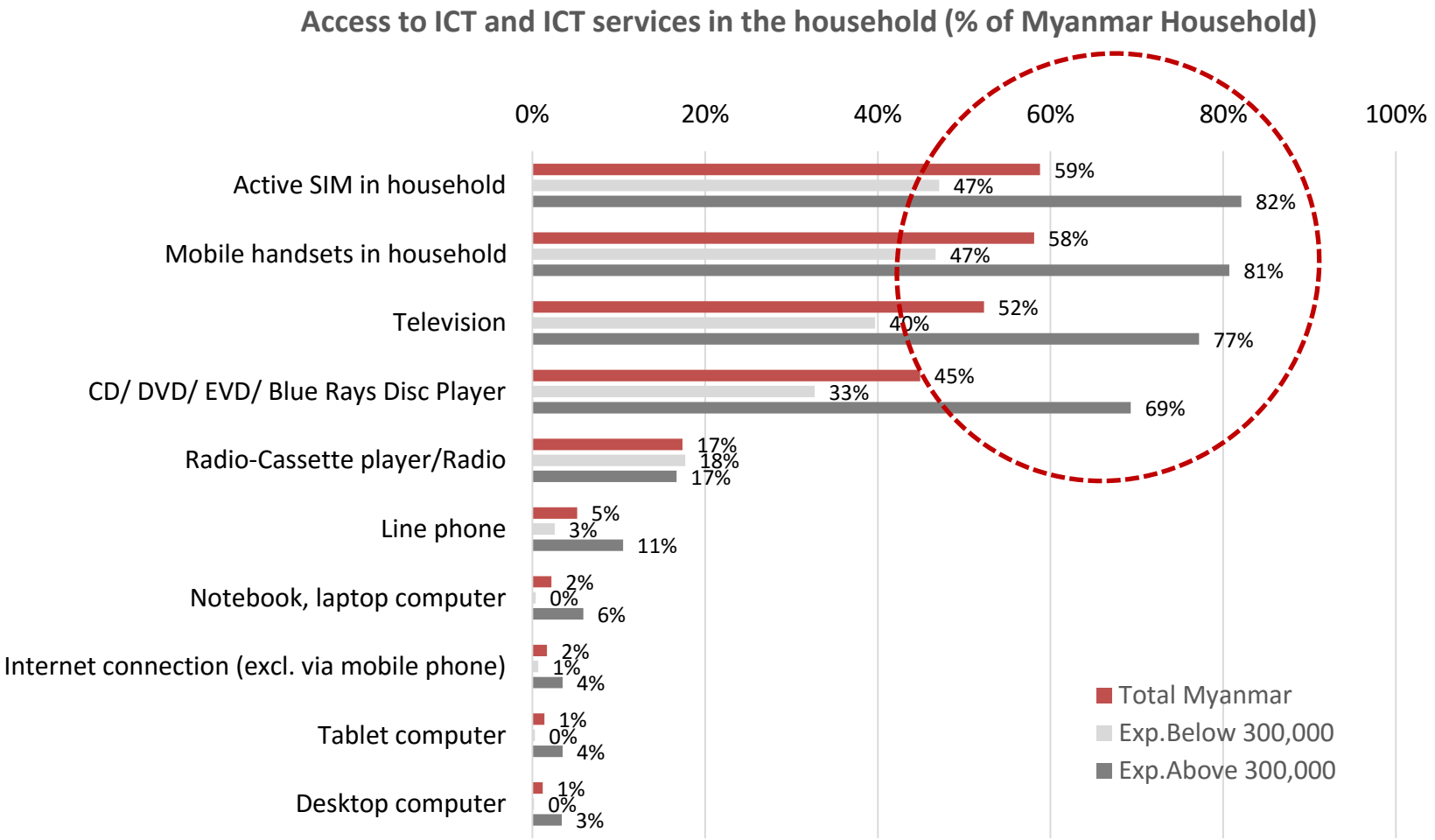
….but big urban vs. rural gap in phone, SIM, TV and CD/DVD ownership



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

Base: All households

…and the gap between rich and poor is also significant in phones, televisions, CD/DVD players…



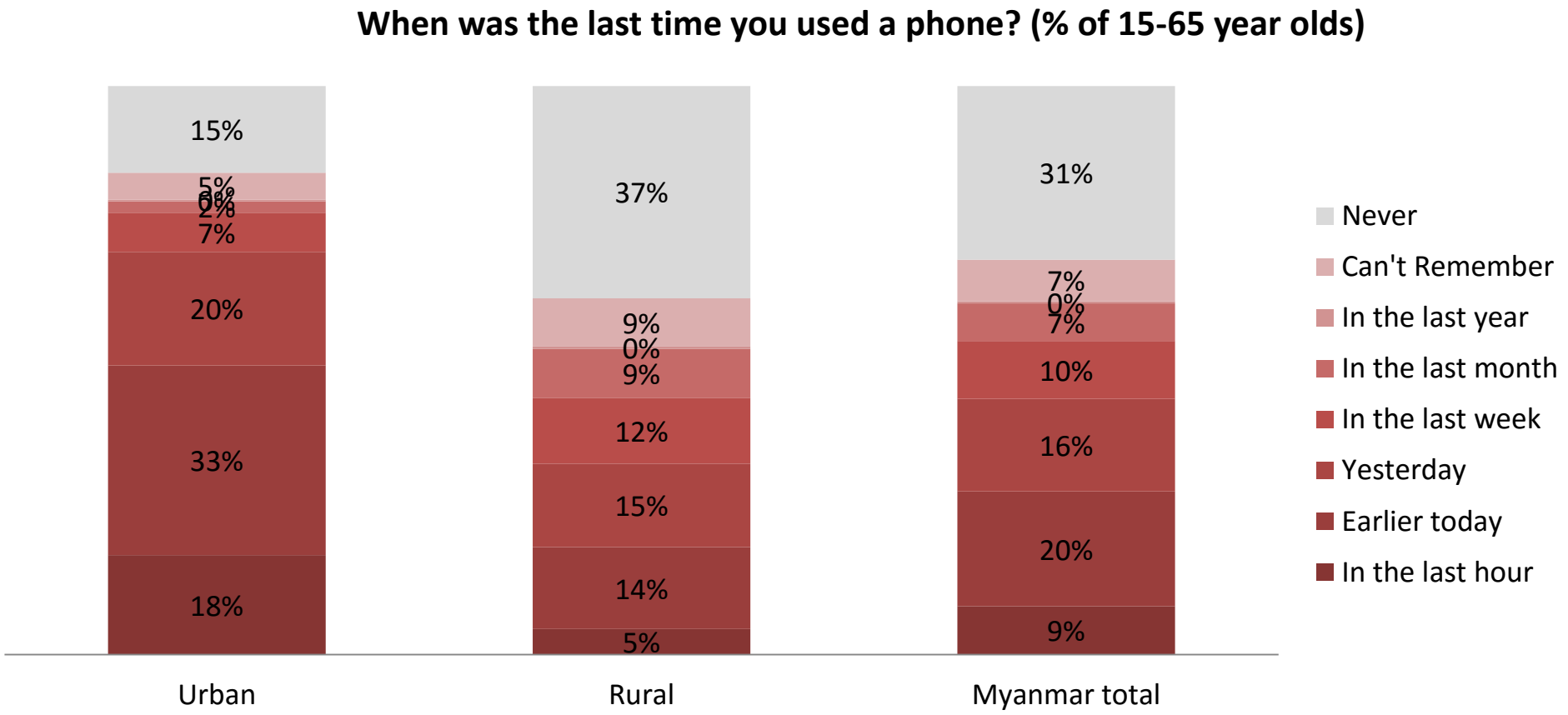
Q: Do your household own working/ functioning **[item]**?

Base: All households

Baseline survey findings

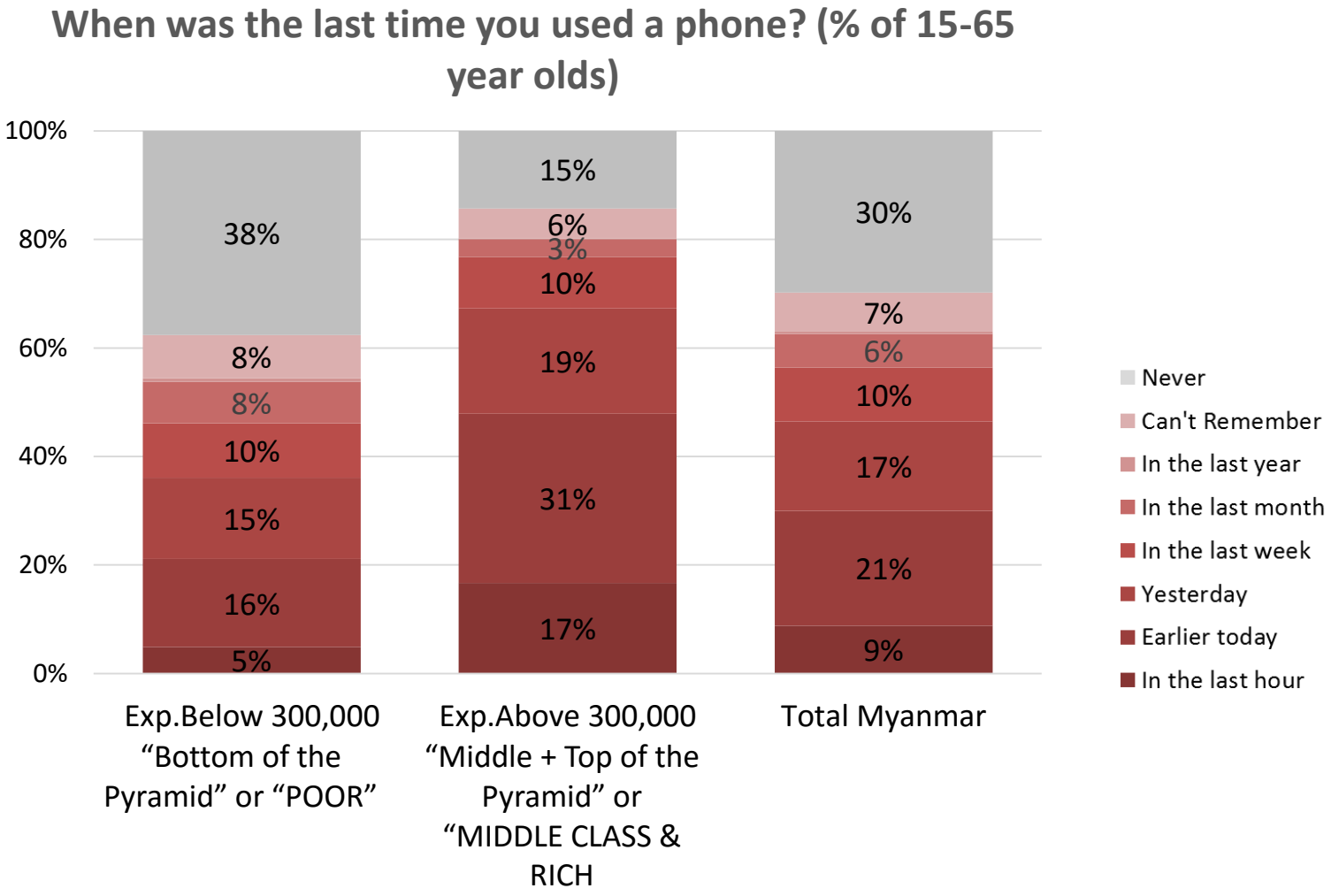
MOST RECENT PHONE USE: WHEN WAS THE LAST TIME YOU USED A PHONE?

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



Base: All respondents

Twice as many at the BOP had never used a phone, compared to the rest (MOP/TOP)



Q: When did you last use a phone to make 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?

Base: All respondents

One year after reforms in MM 46% of the "BOP" had used in last week; 44% in last month. Compared to Asian neighbors 8 – 10 years after reforms….

% of BOP who had used a phone in the last 3 months (surveyed in 2006)

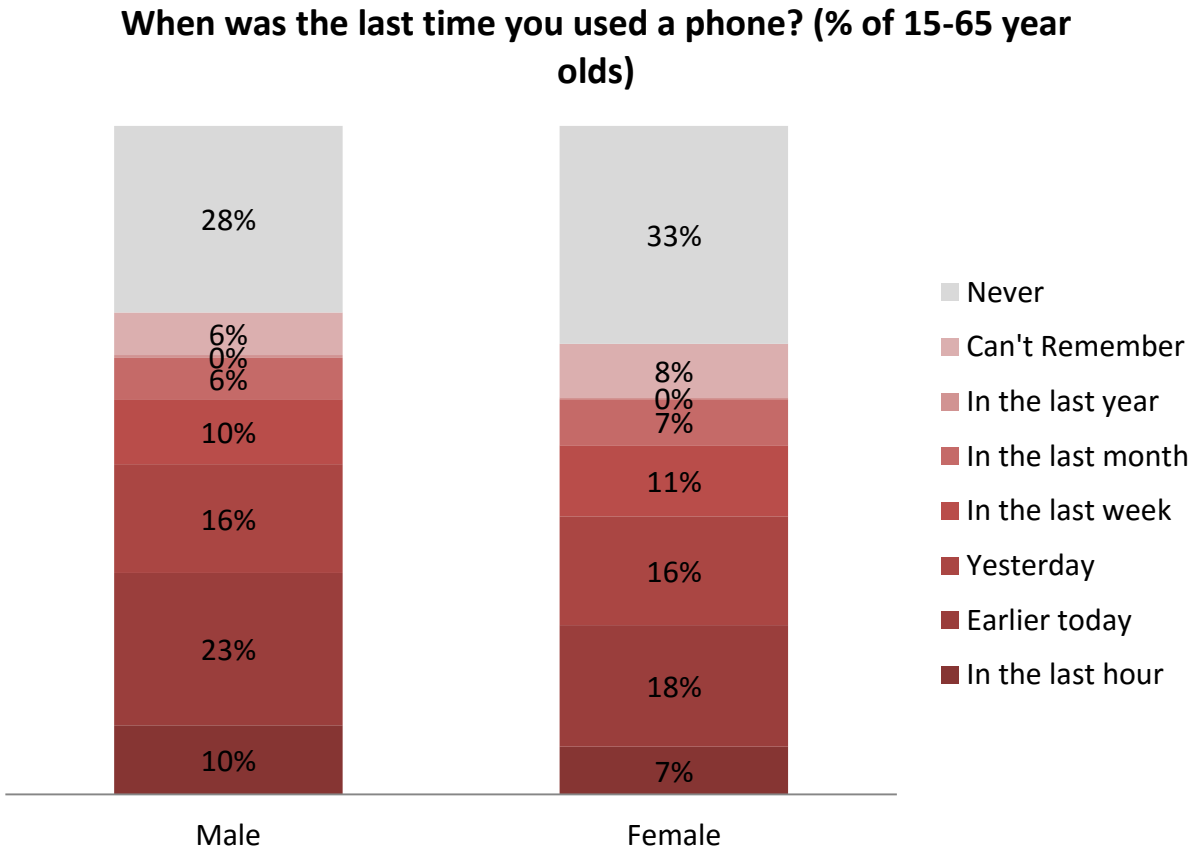
	South Asia			South East Asia	
	Pakistan	India	Sri Lanka	Philippines	Thailand
Used phone in last 3 months	98%	94%	92%	93%	95%

% of BOP who had used a phone in the last week (surveyed in 2008)

	Bangladesh	Pakistan	India	Sri Lanka	Philippines	Thailand
Used phone in last week	82%	66%	65%	77%	38%	72%

Source: LIRNEasia 2006 and 2008. Teleuse @ the Bottom of the Pyramid Studies. Surveys nationally representative of the BOP in each listed country. BOP = those at the bottom of the pyramid, defined as those belonging to SEC D and E.

Small gender variation in using a phone for calling/SMS: males more frequent teleusers

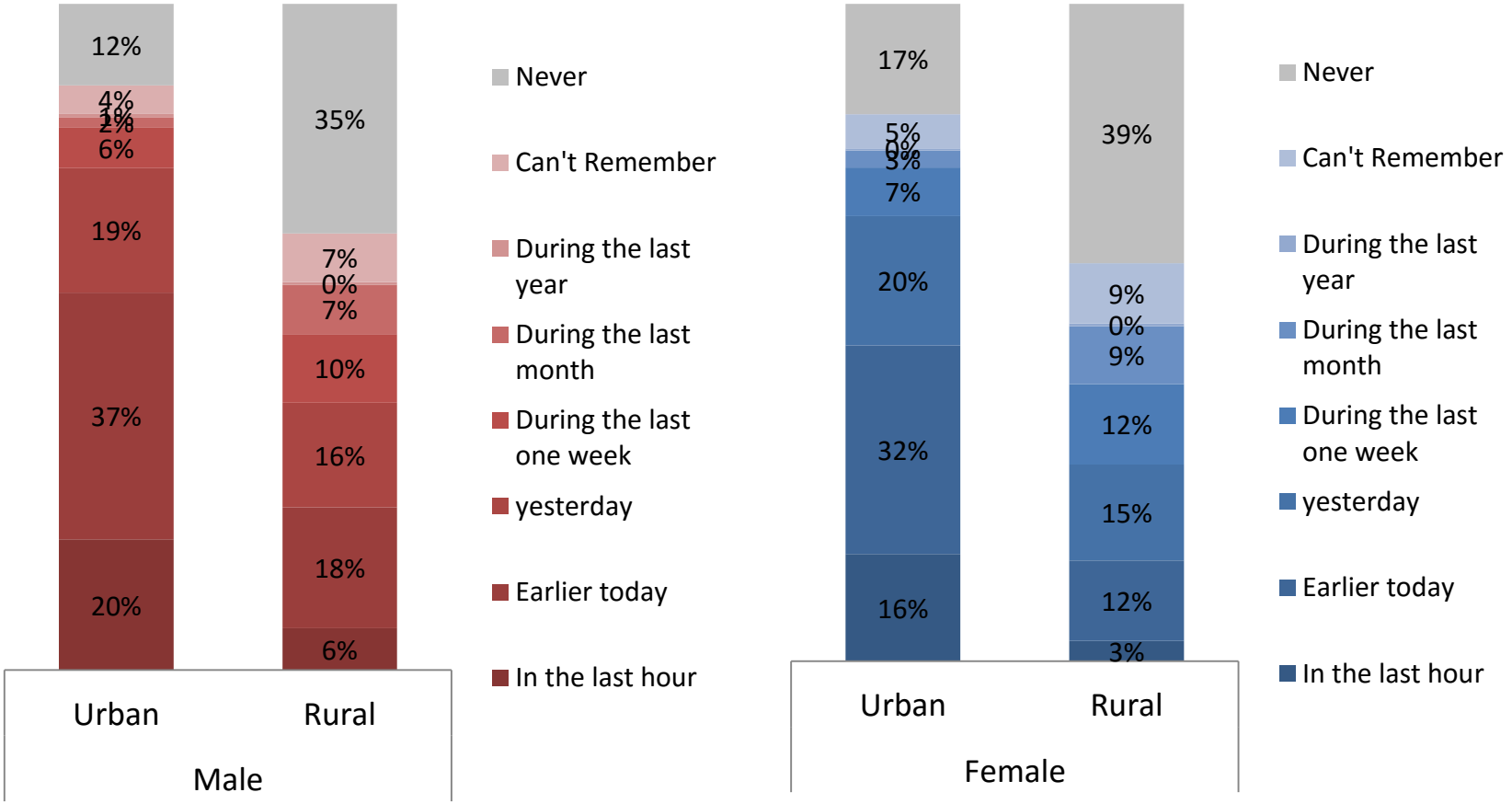


Q: When did you last use a phone to take or receive a call? It could be through your own phone, a neighbors' phone, a friend's phone, communication kiosk/shop or any other. It also need not be paid for?

Base: Respondents who had ever used a phone before

Location mattered more than gender: Rural women & men both had less frequent use than urban women & men

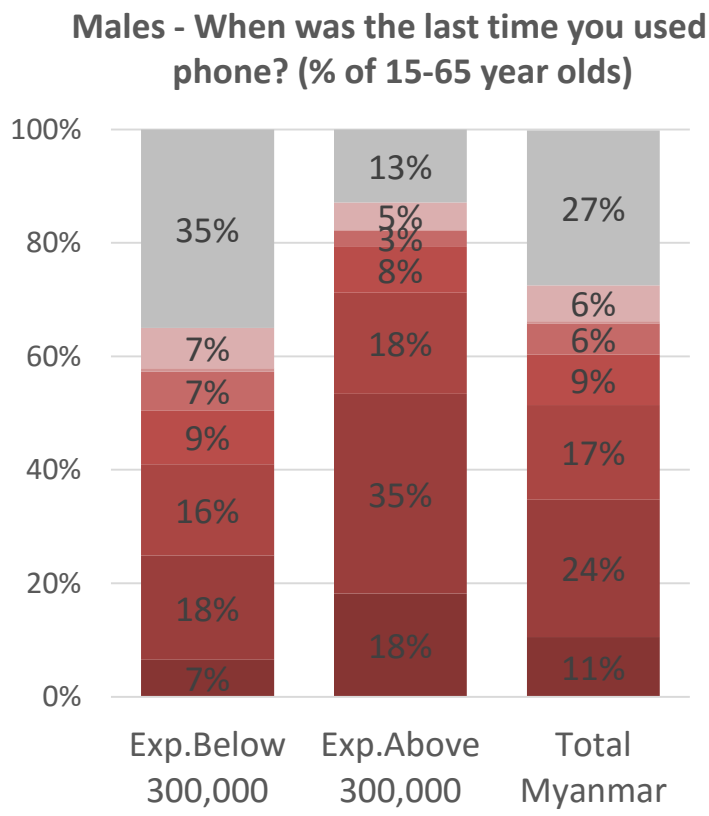
When was the last time you used a phone?
(% of 15-65 year olds)

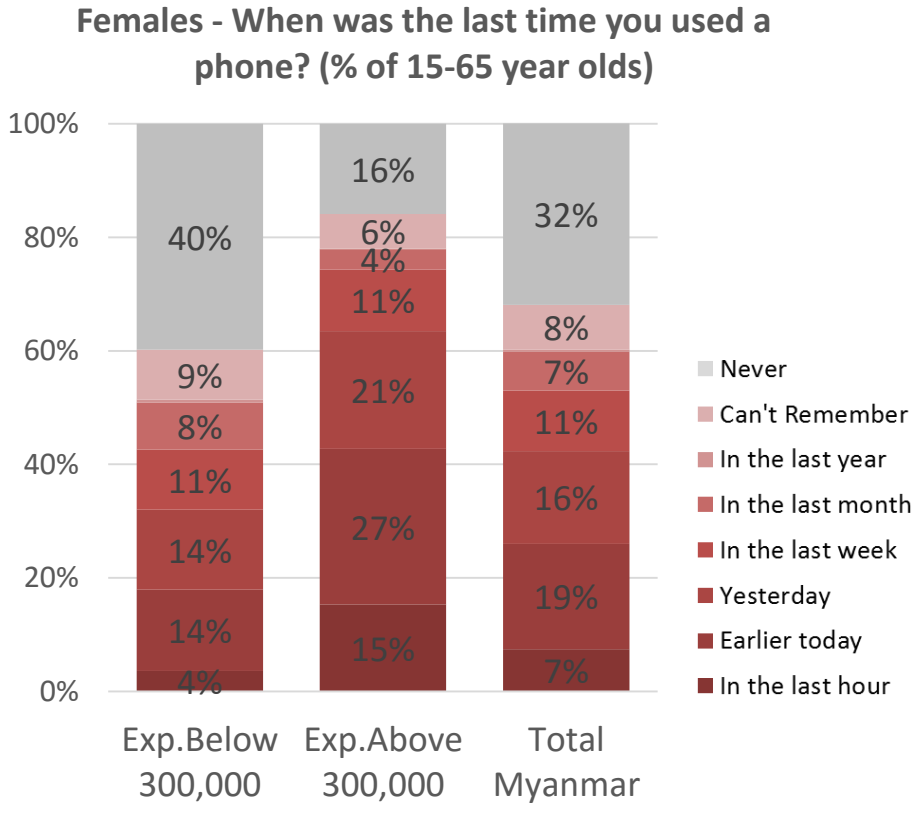


Base: All respondents

Source: LIRNE*asia* Baseline Survey (2015)

Income also mattered more than gender: access among poor women similar to poor men

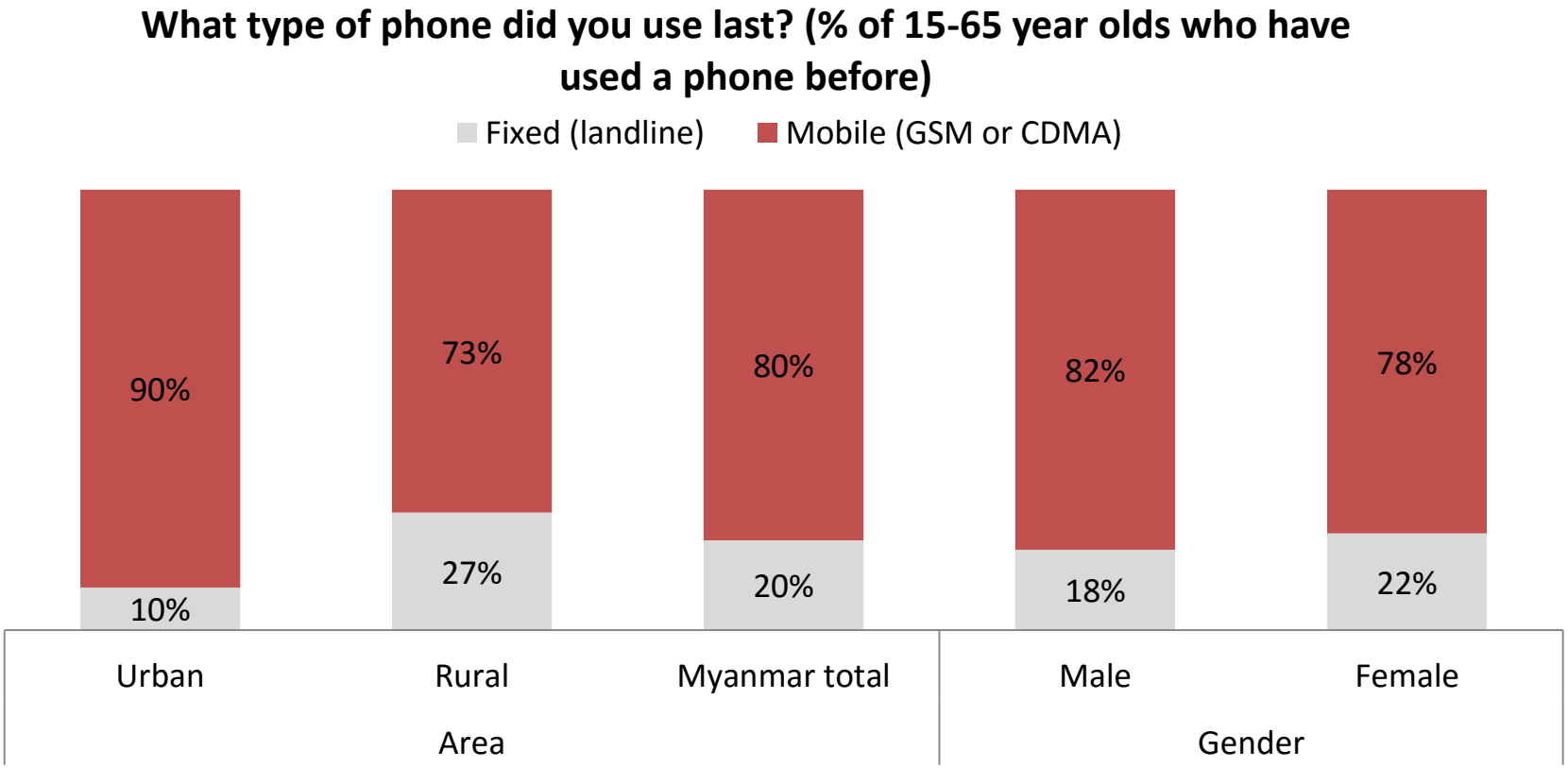




Base: All respondents

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?

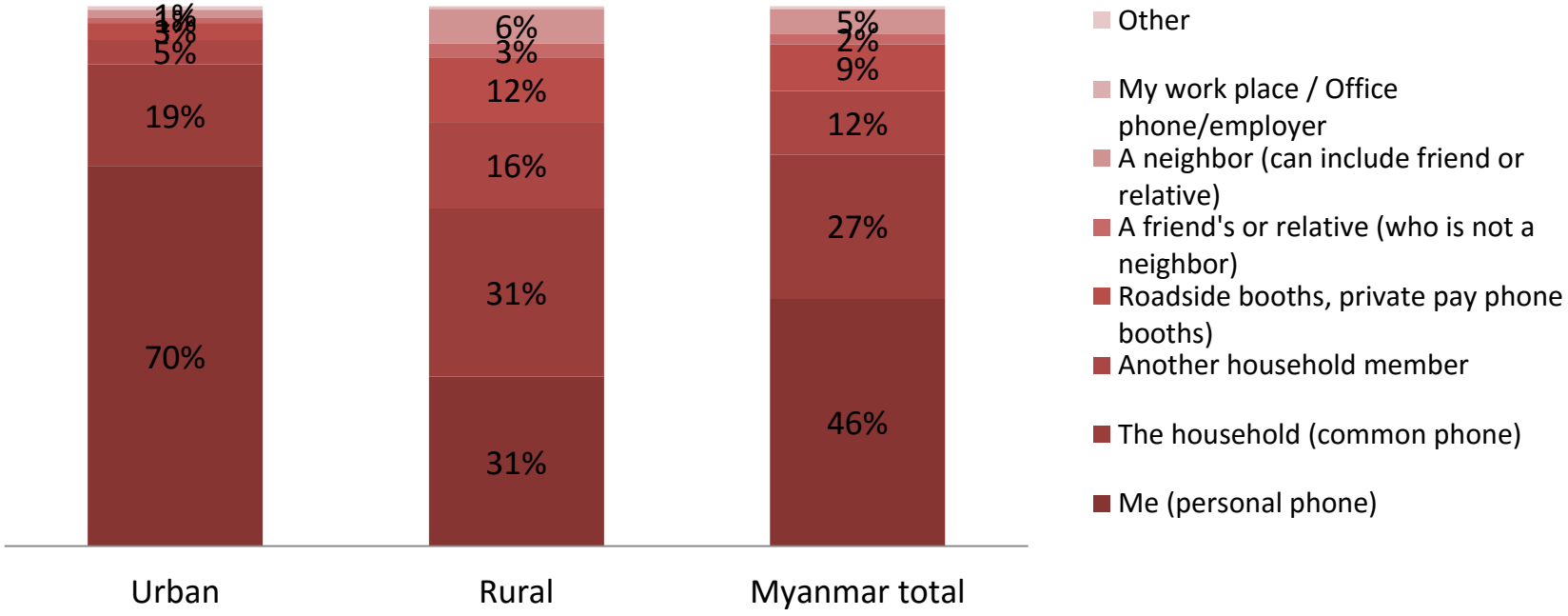
80% of teleusers said the last time they used a phone, it was a mobile (not necessarily their own)



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)

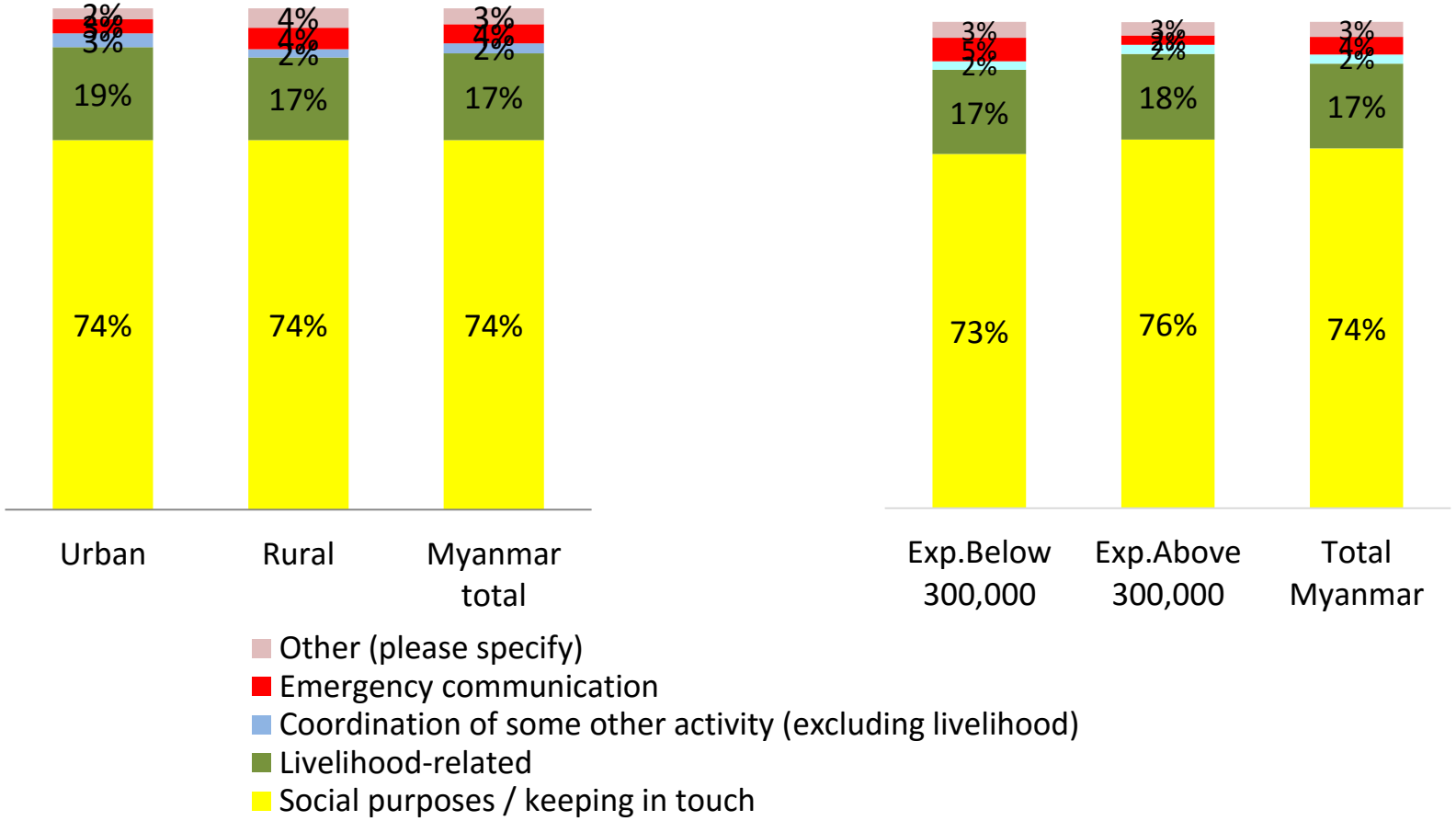


Q: What type of phone did you make or receive your last phone call from?

Base: Respondents who had ever used a phone before

Calls mostly for social purposes, some livelihood-related communication. No difference between urban/rural or rich/poor

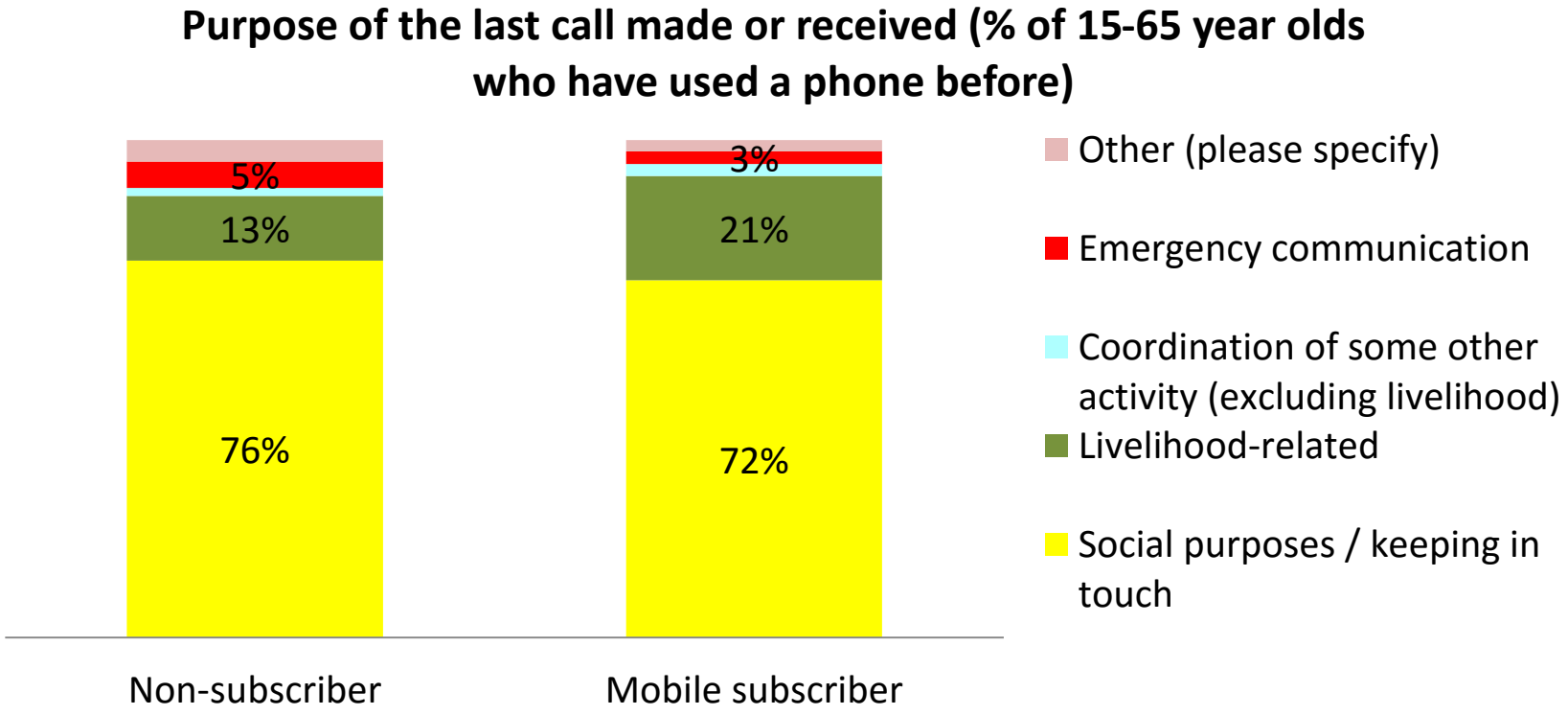
Purpose of the last call made or received (% of 15-65 year olds who have used a phone before)



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

Base: Respondents who had ever used a phone before

But ownership changes use: Owners more likely to have made a livelihood related call; non-owning users slightly higher emergency use



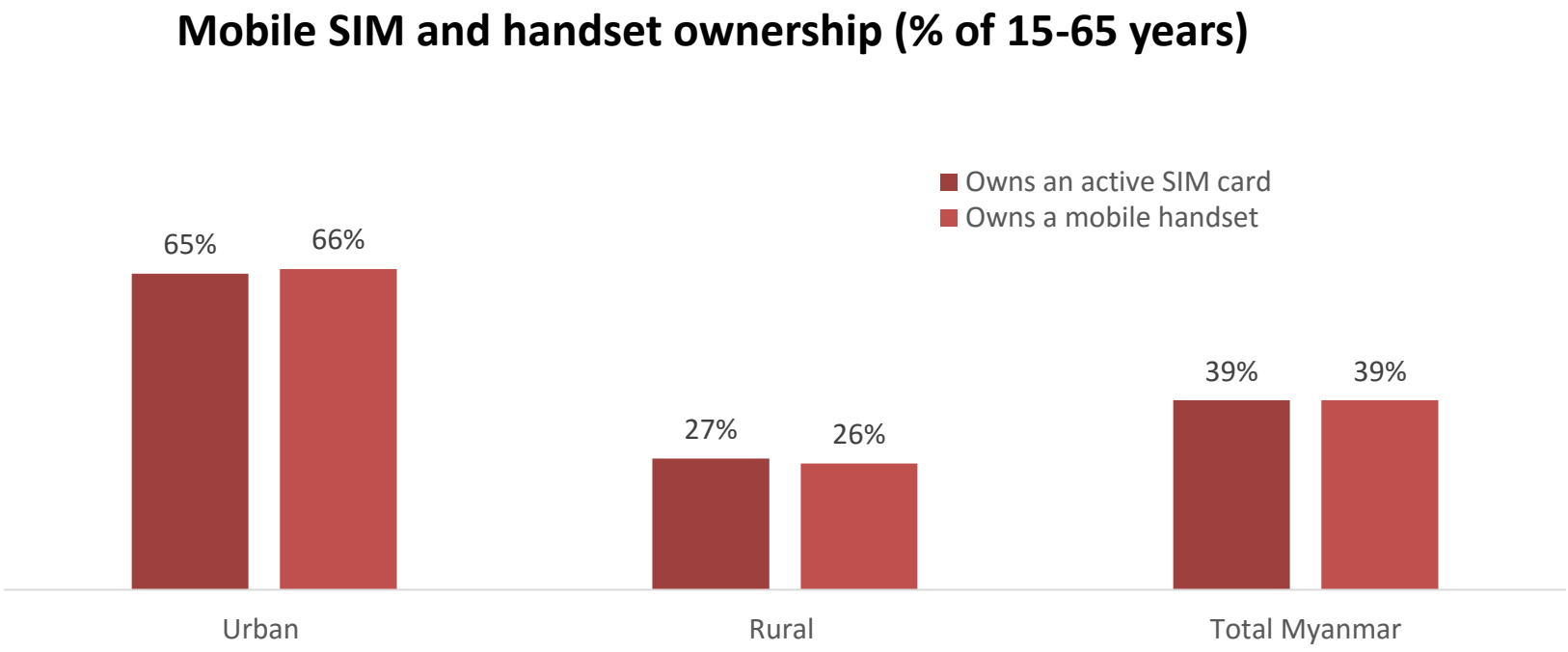
Q: Can you tell us the purpose of your call?

Base: Respondents who had ever used a phone before

Baseline survey findings

MOBILE OWNERSHIP (NOT JUST USE)

38% Myanmar 15-65 population were mobile owners

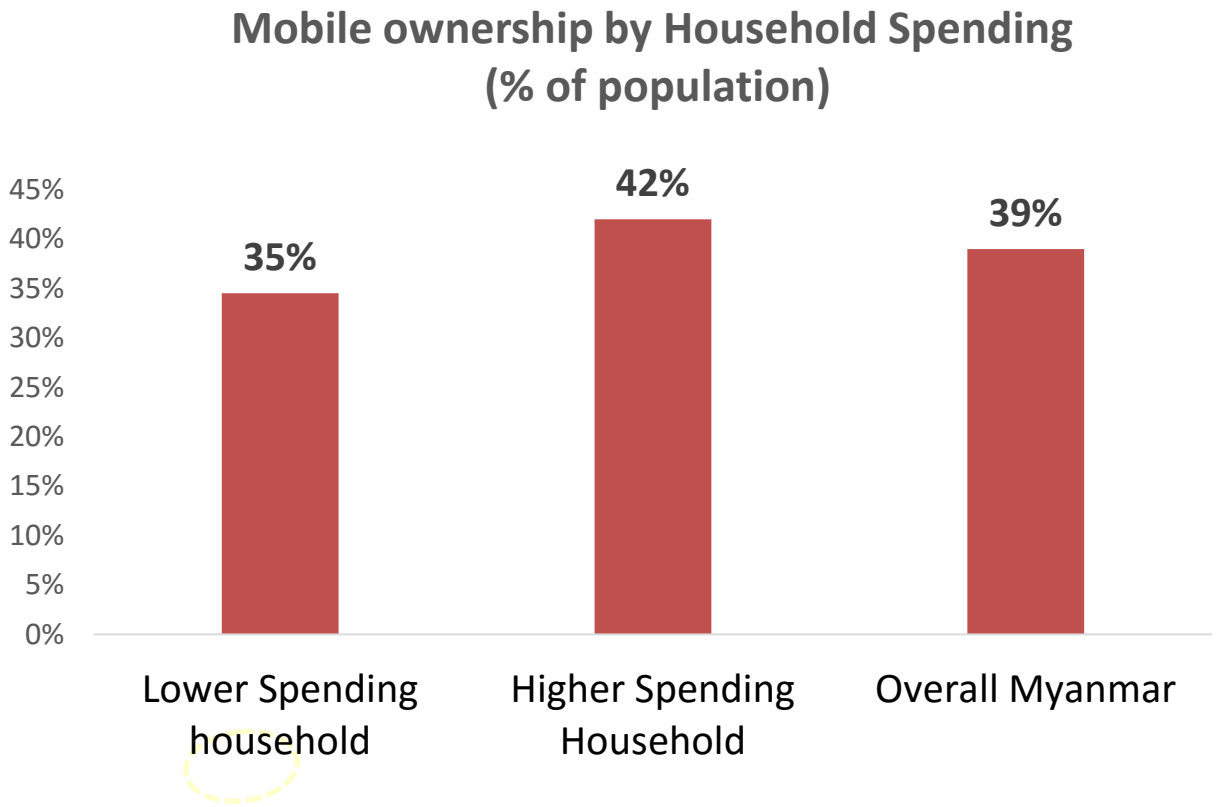


- City-wise SIM penetration:
  - Yangon-83%; Mandalay-55%; Nay Pyi Taw-55%

Q:Which describes your status of mobile phone ownership?

Base: All respondents

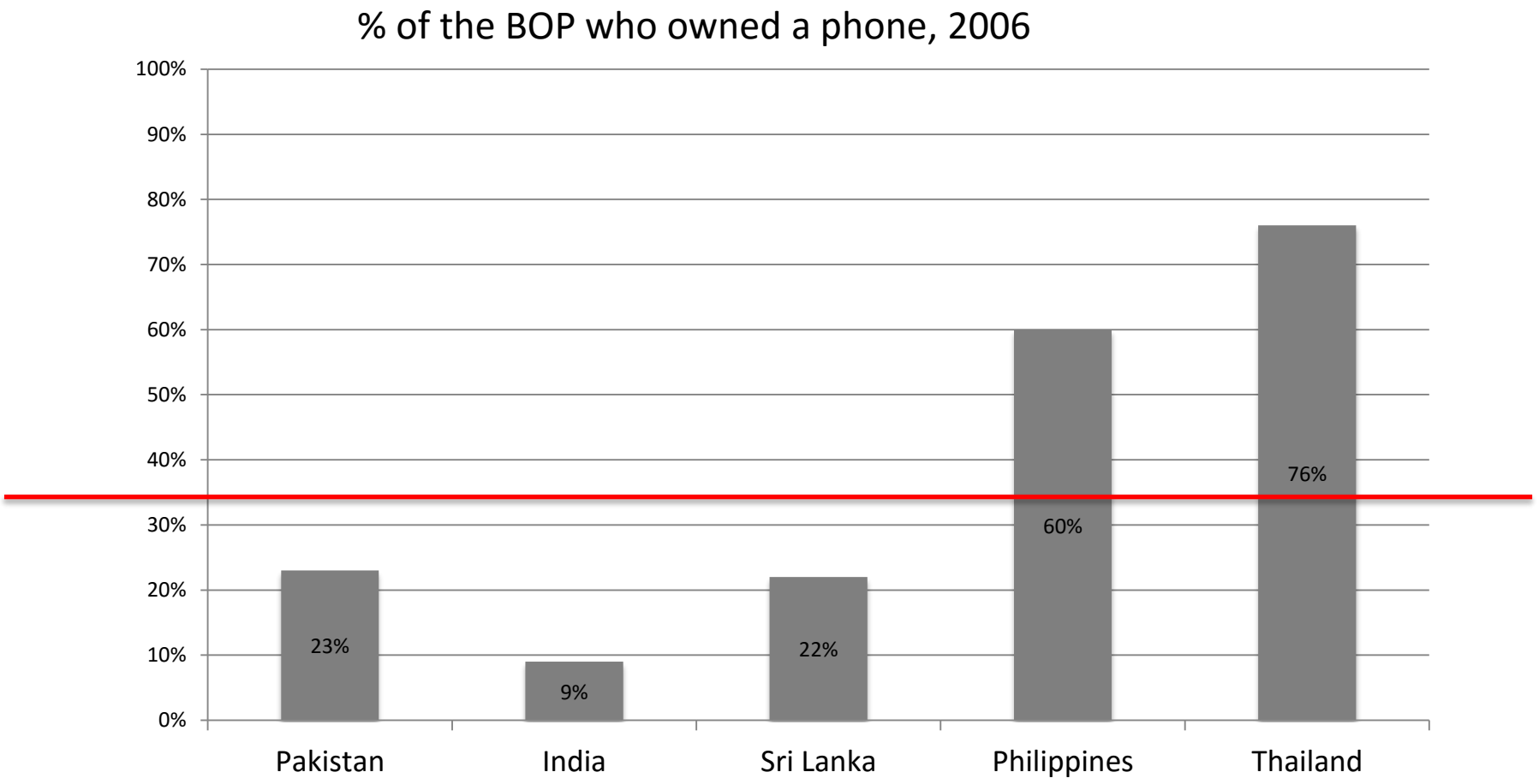
Higher spending households had higher mobile phone ownership



Q:Which describes your status of mobile phone ownership?

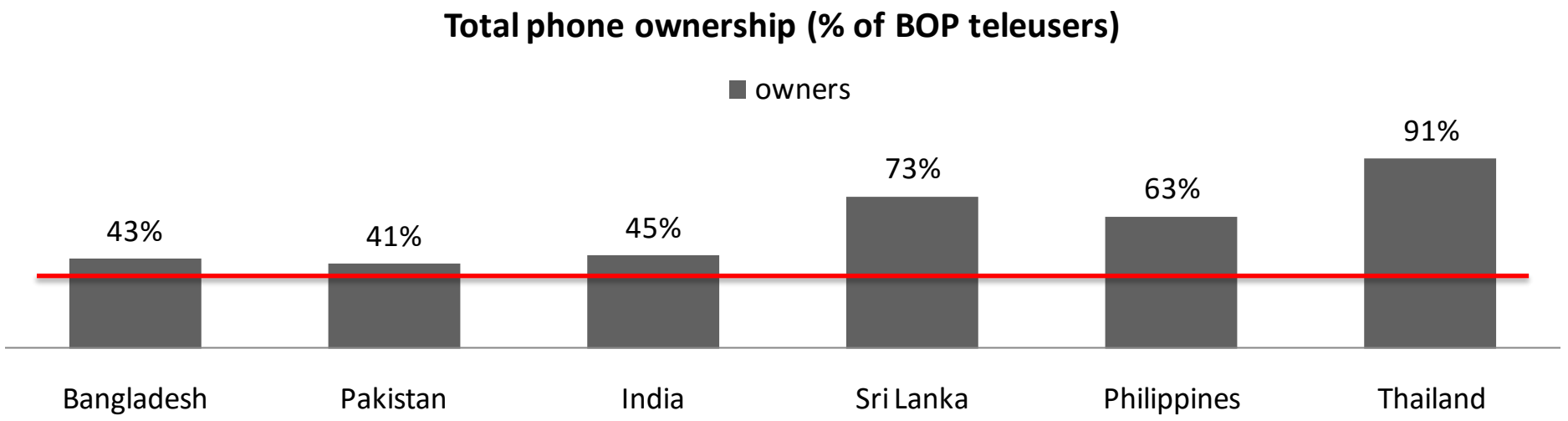
Base: All respondents

35% phone penetration in poor households in Myanmar 6 months after liberalization, compared to some Asian neighbors in 2006….

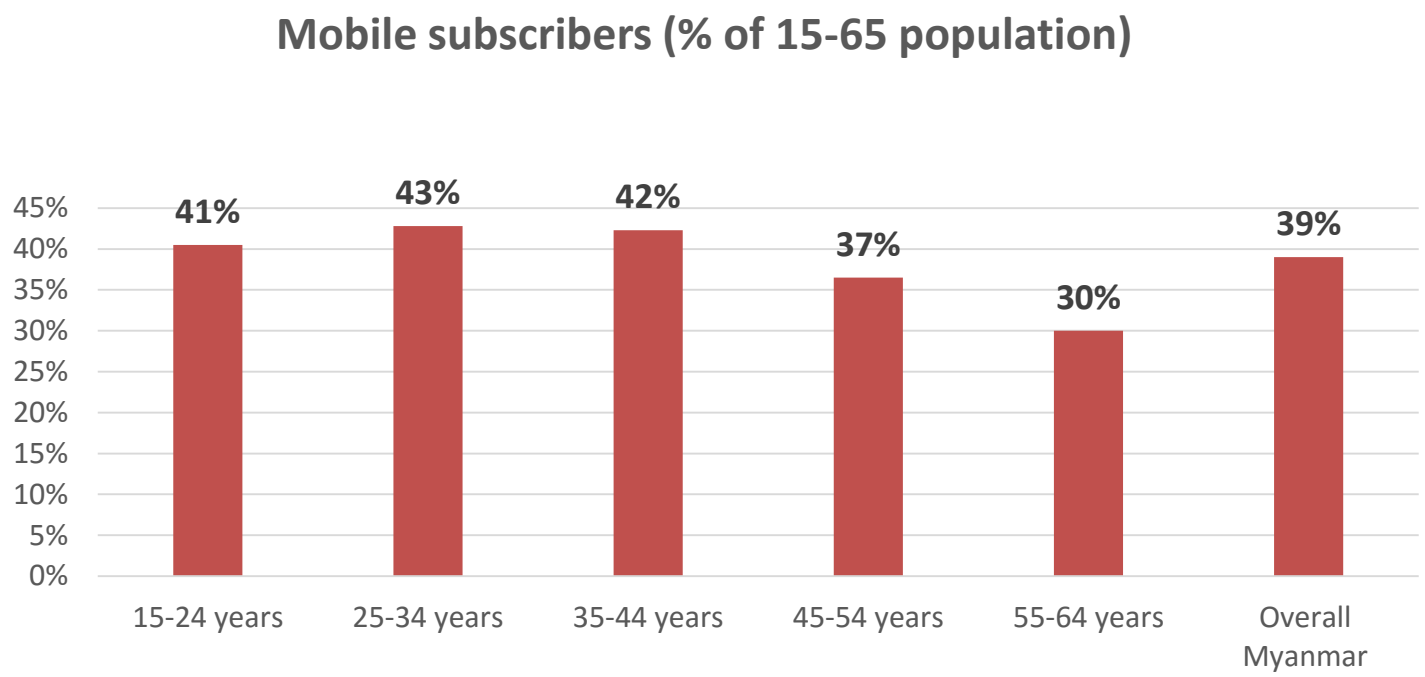


Base: % of rents

….and compared to 2008

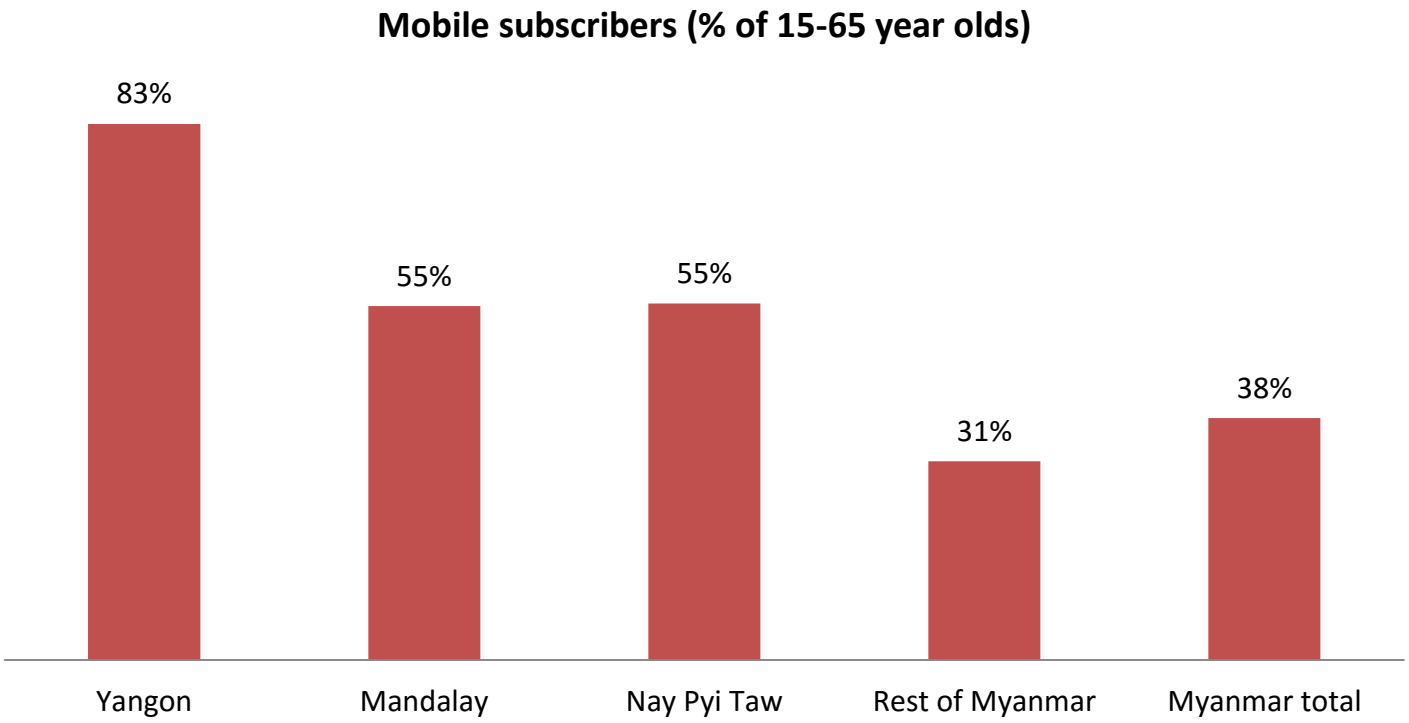


Mobile ownership was highest among 15-44 year olds



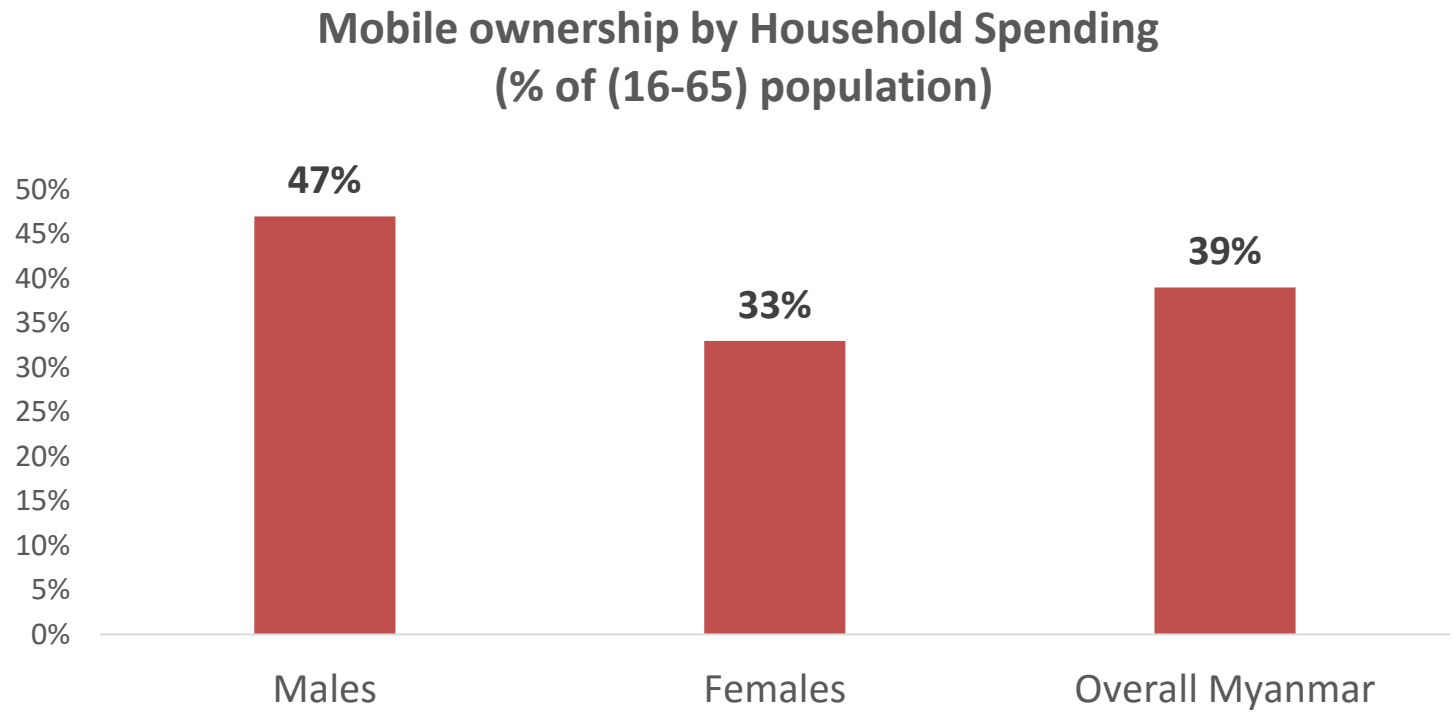
Base: All respondents

Adoption was driven by big cities



Base: All respondents

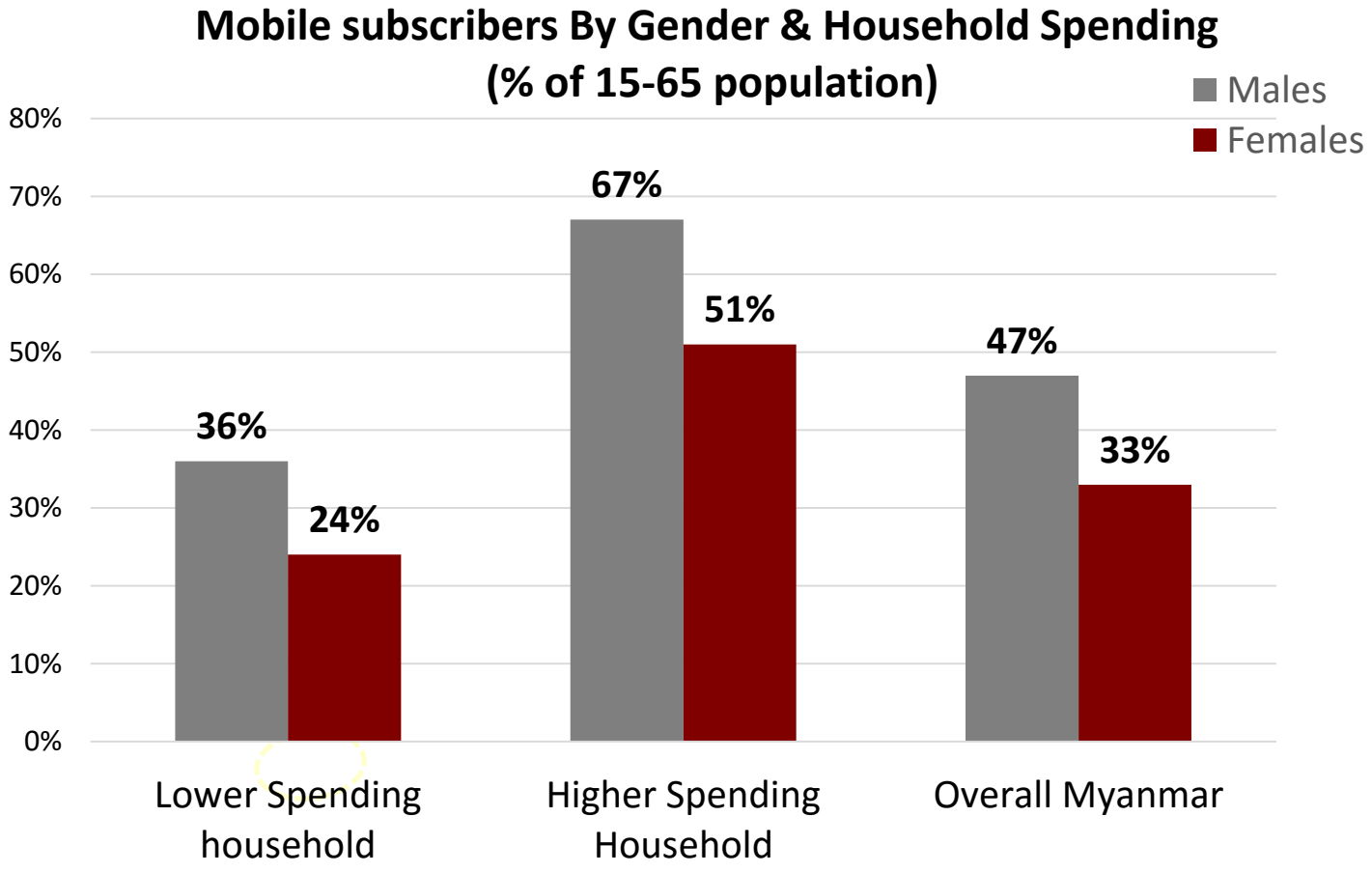
Gender gap in ownership of a phone much higher than in use of a phone



Q:Which describes your status of mobile phone ownership?

Base: All respondents

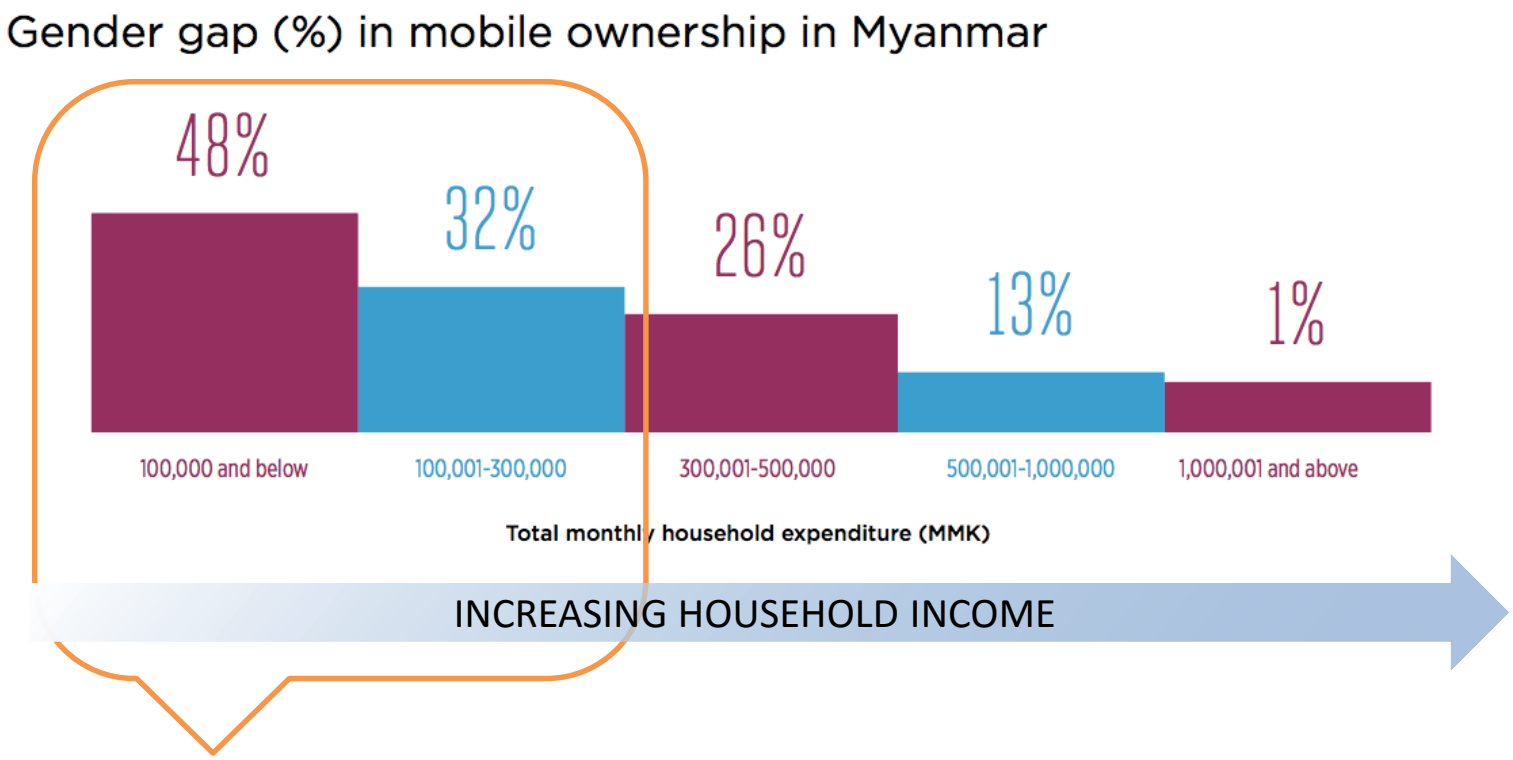
Gender gap in mobile ownership exists in high as well as low-spending households



Q:Which describes your status of mobile phone ownership?

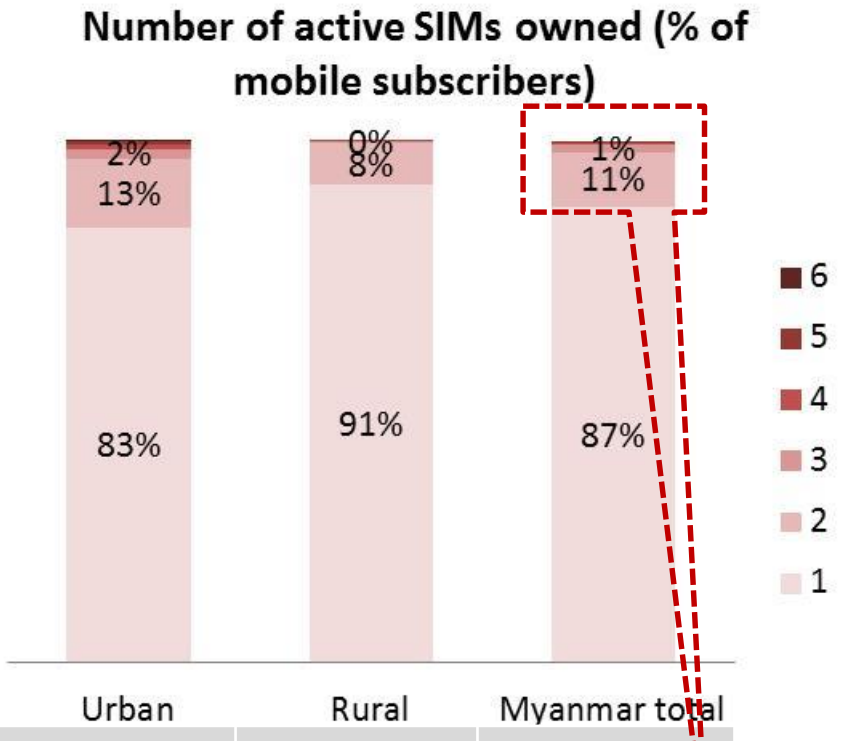
Base: All respondents

The poorer the household, higher the gender gap in mobile phone ownership



BOP/Below MMK300,000: 34%

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

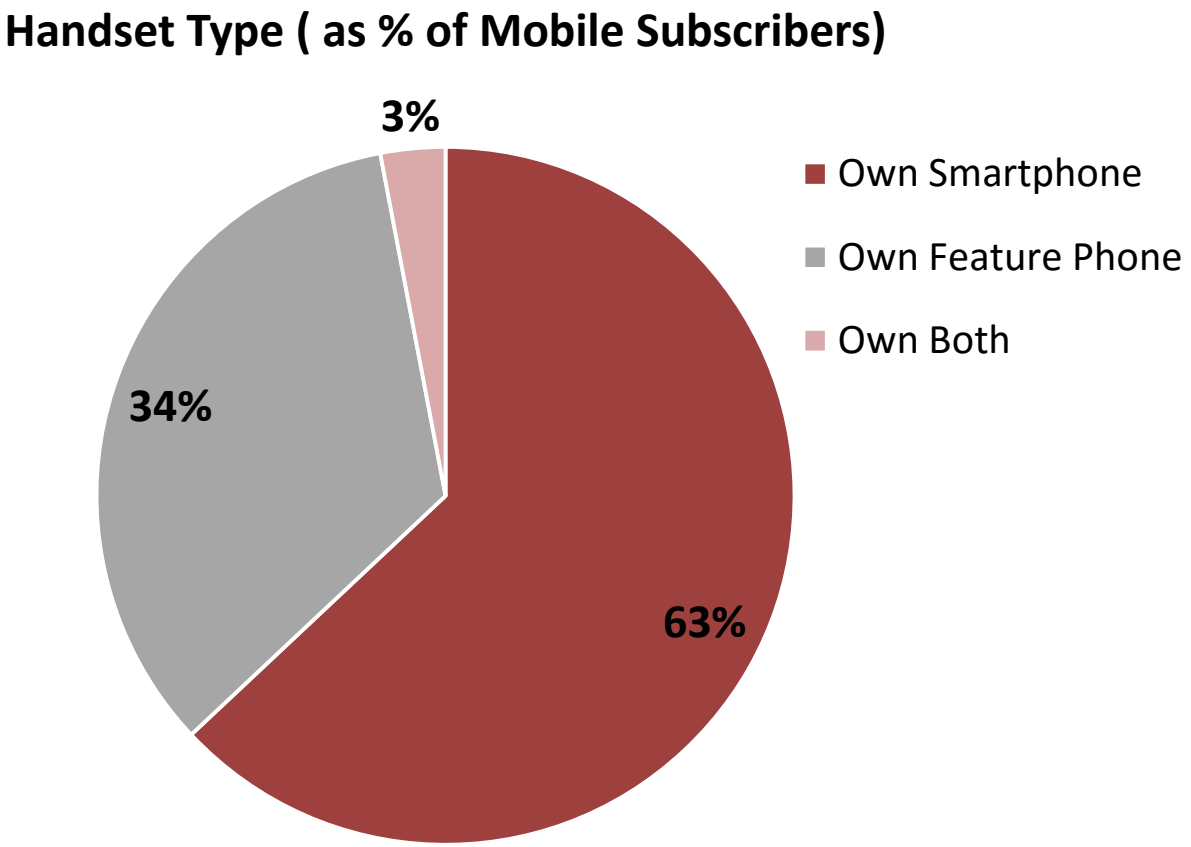


	Urban	Rural	Myanmar total
More than 1 SIM	17%	8%	13%

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

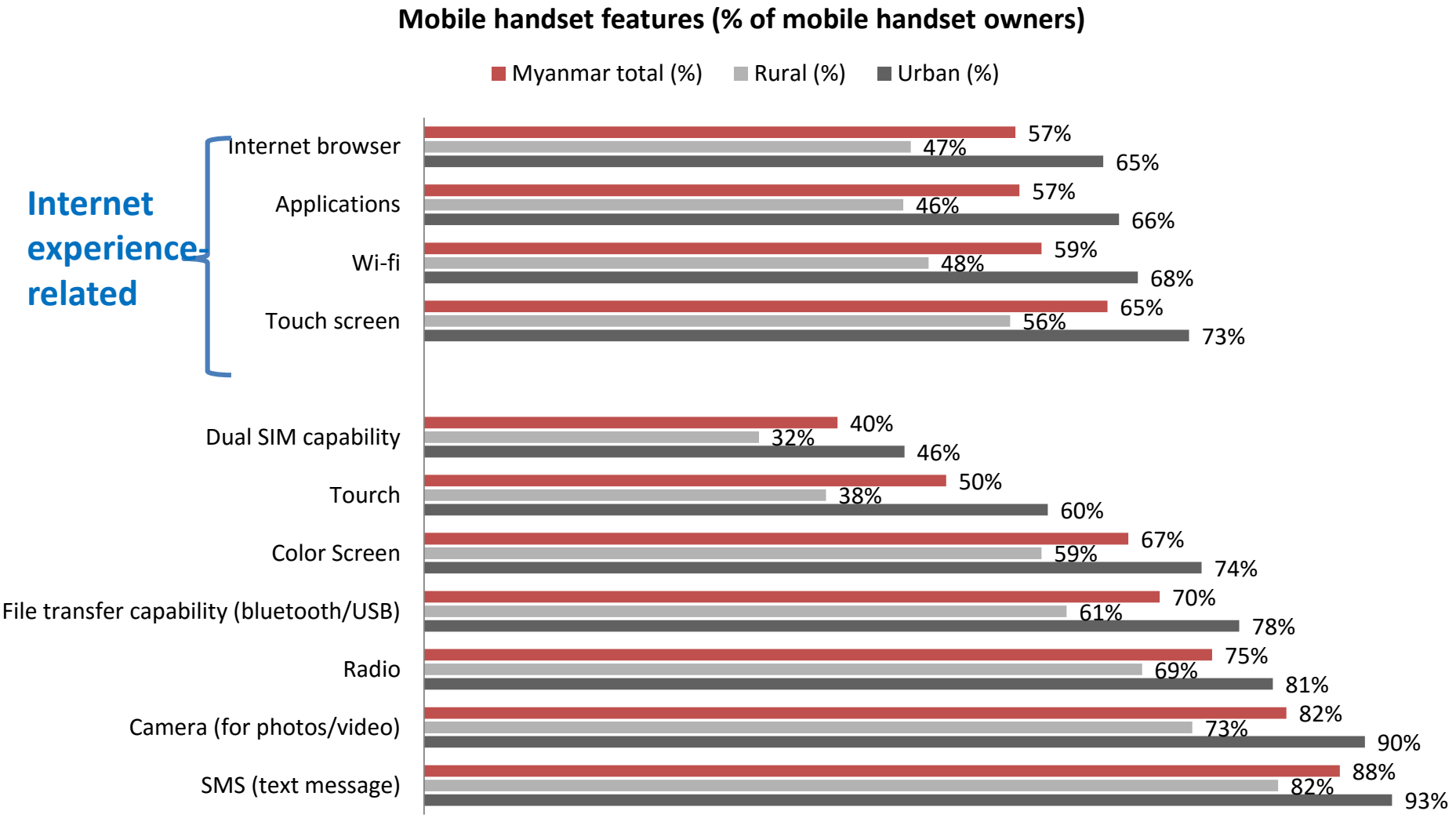
Base: Mobile phone subscribers

Smartphones dominate: 63% all subscribers have one



Base: Mobile phone subscribers

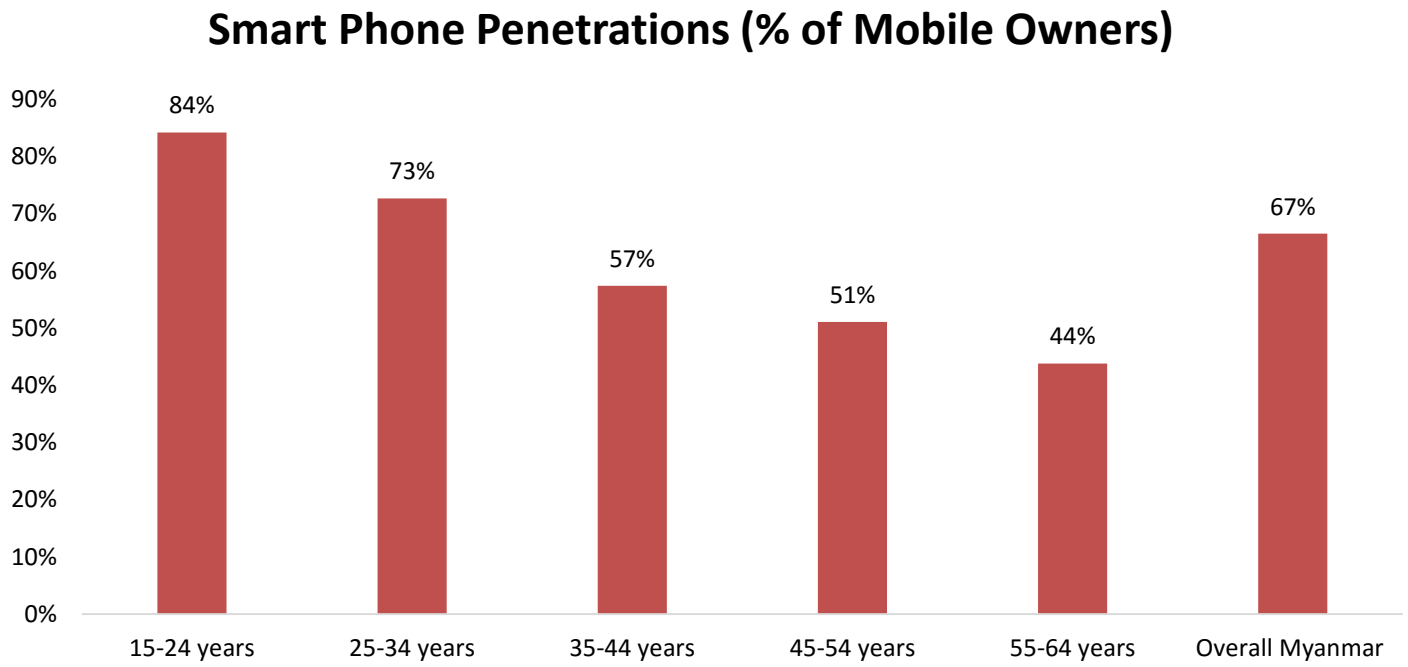
…with internet-ready features



Q:What are the features your phone has?

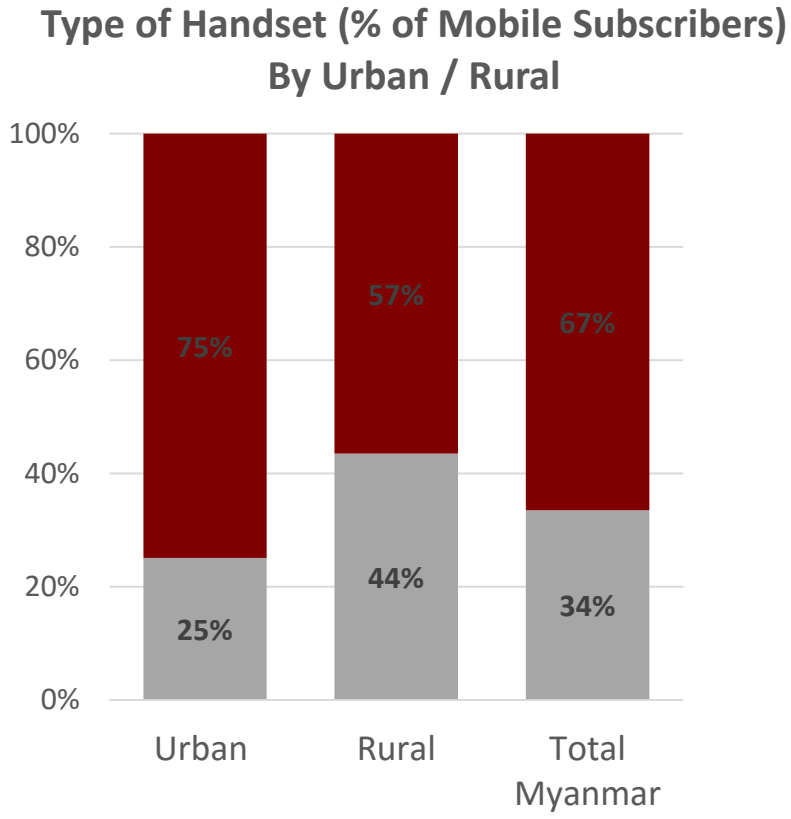
Base: Those who own a mobile handset

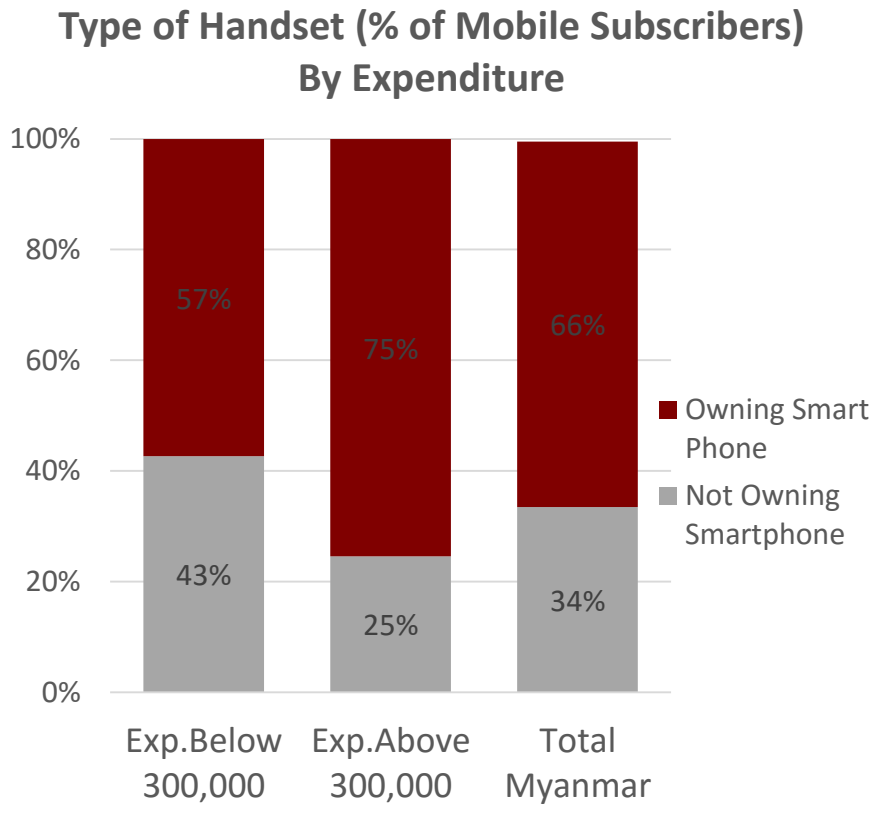
Smartphone penetration is skewed toward younger age groups



Base: All Mobile Owners

Smartphones dominate: more often in the hands of urban, high-spending ("richer") households

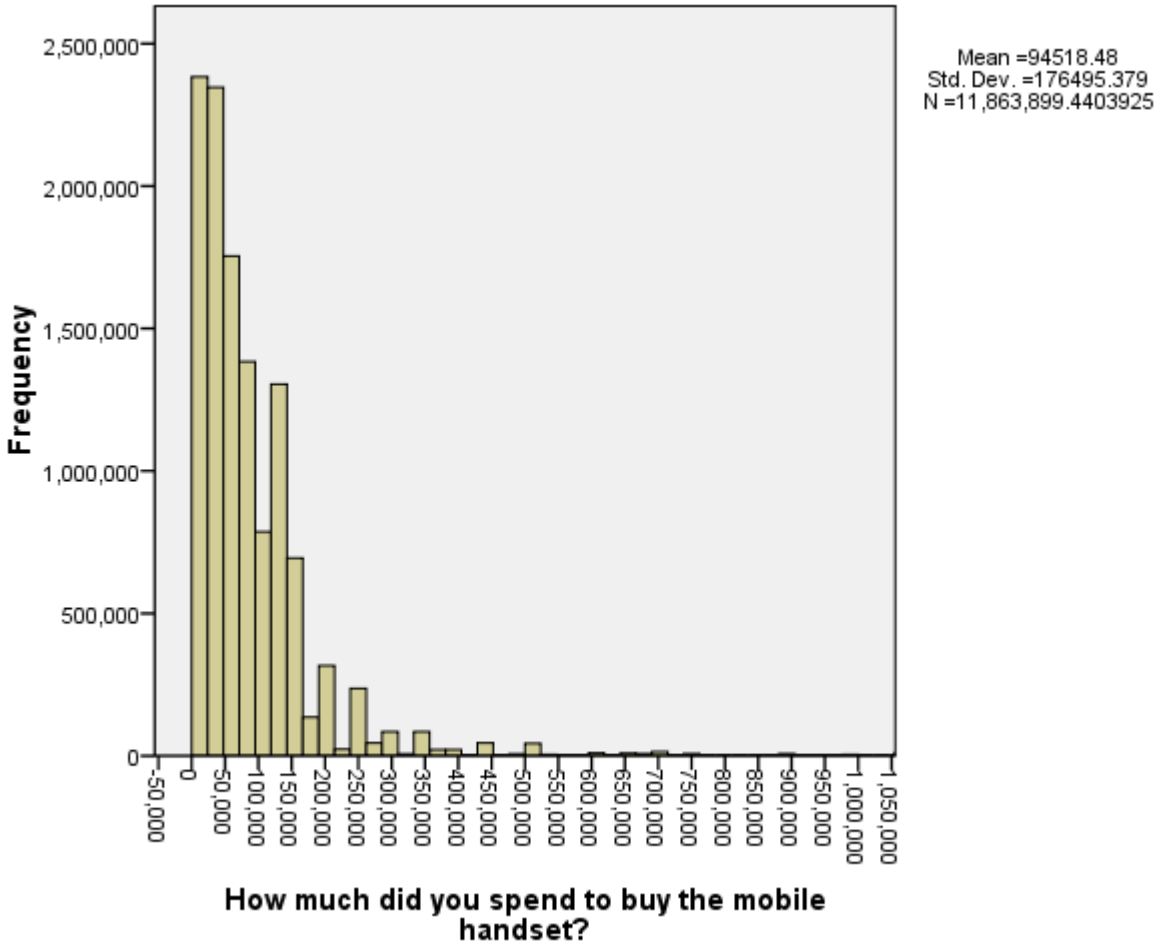




Q:What are the features your phone has ? Dual SIM capacity ?

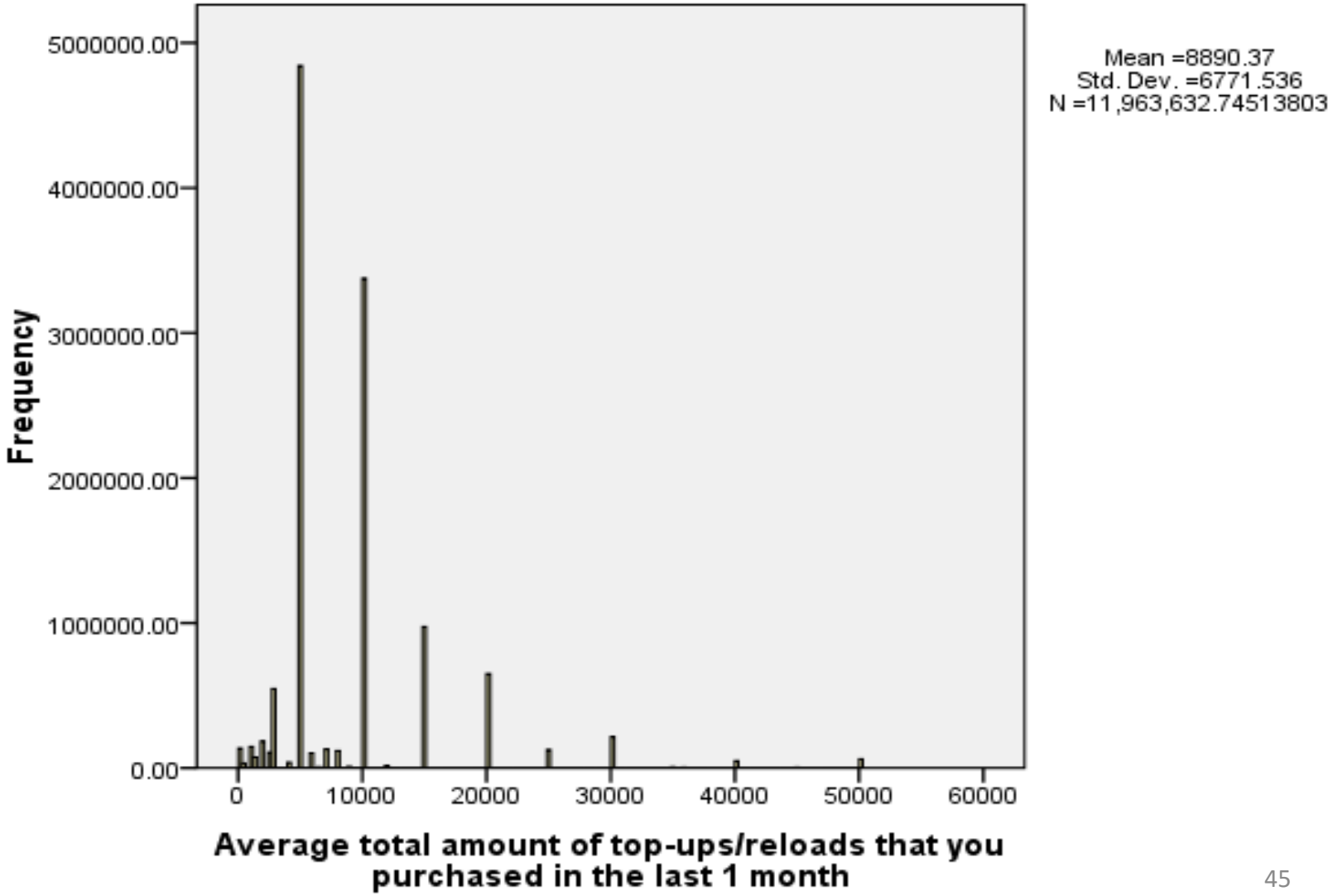
Base: Mobile phone subscribers

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



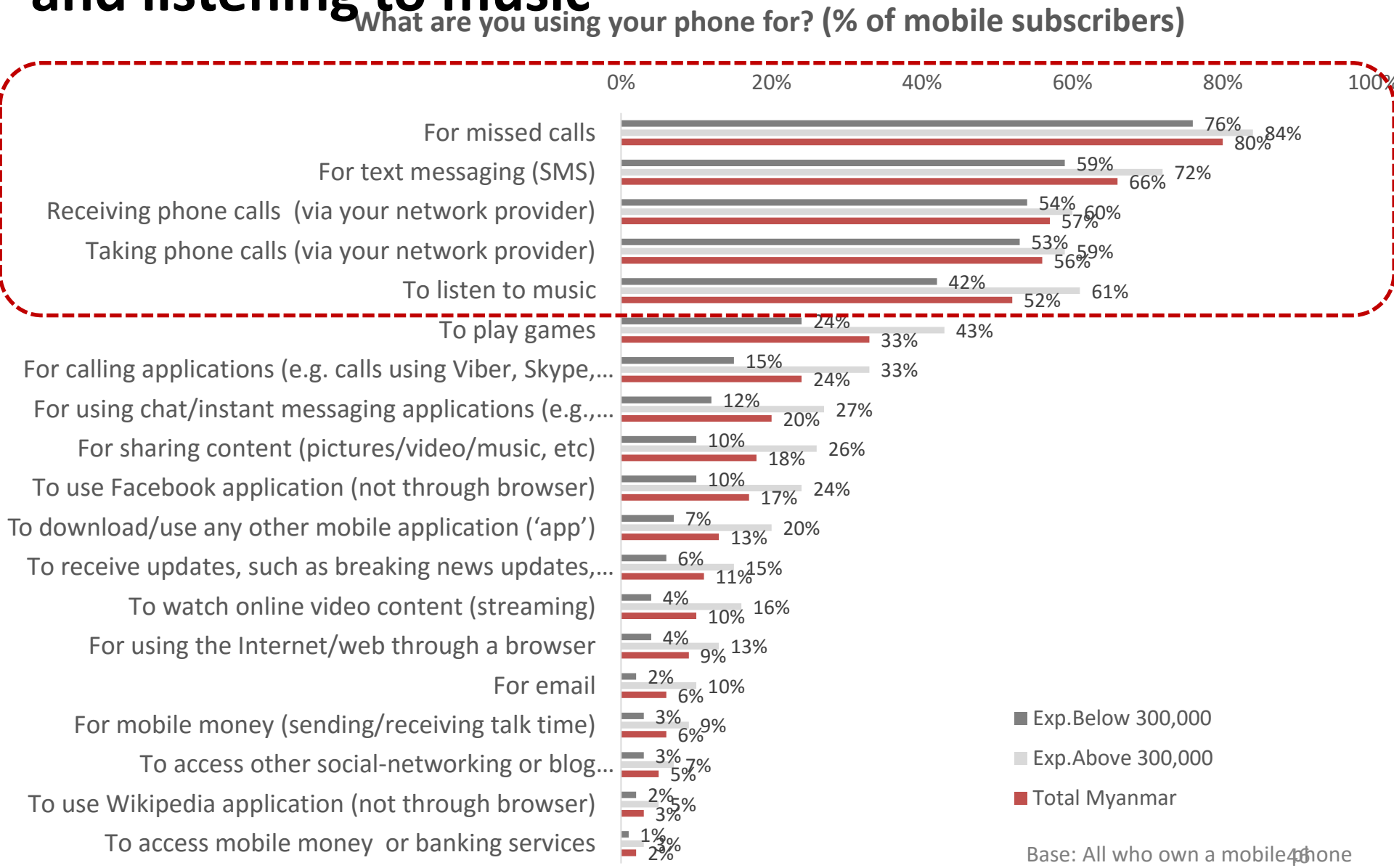
Base: Mobile phone subscribers

Monthly spend on top-ups MMK 8890 (USD8) on average



Base: Mobile phone owners

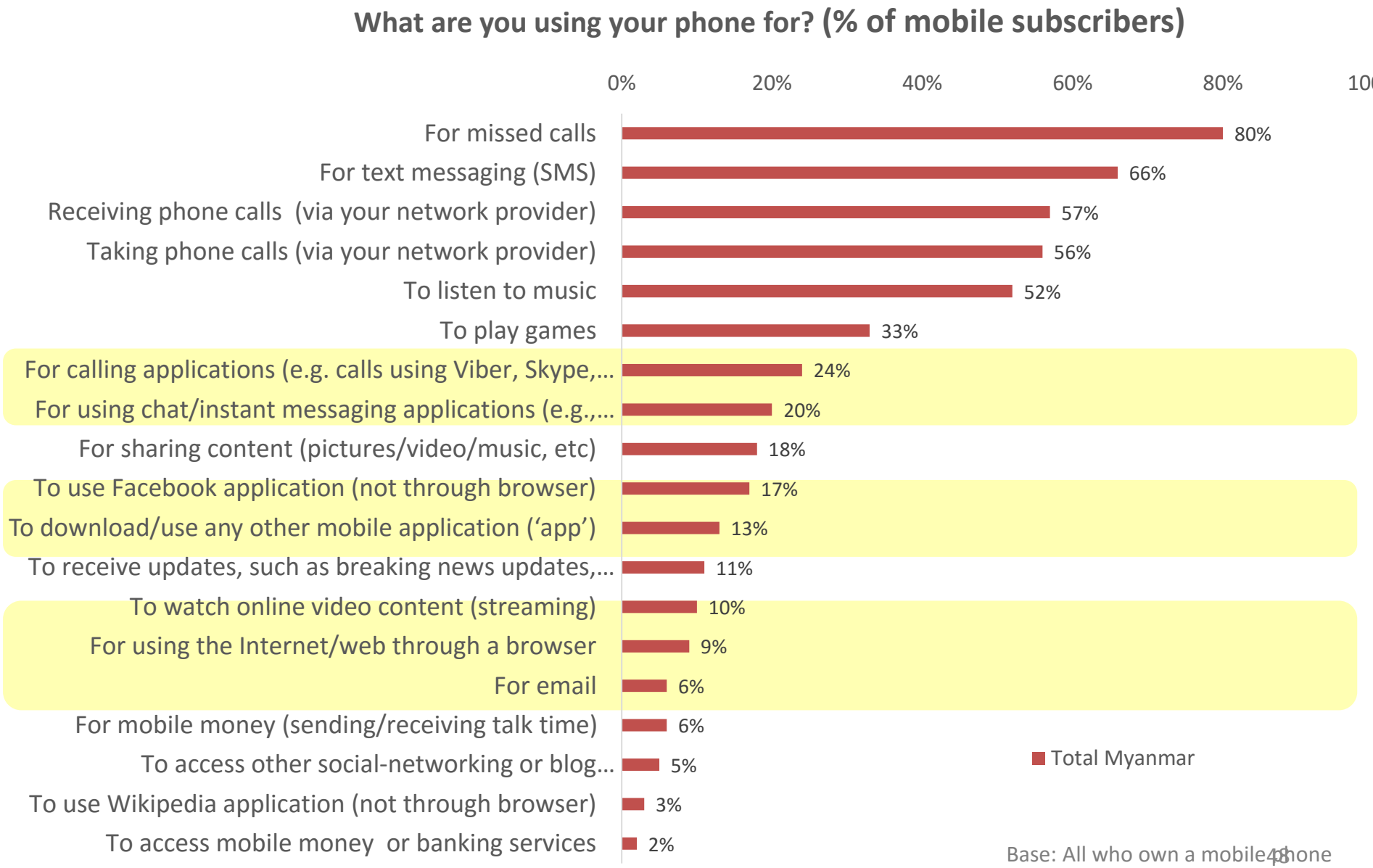
Mobile mostly for voice calls, SMS, missed calls and listening to music



Baseline survey findings

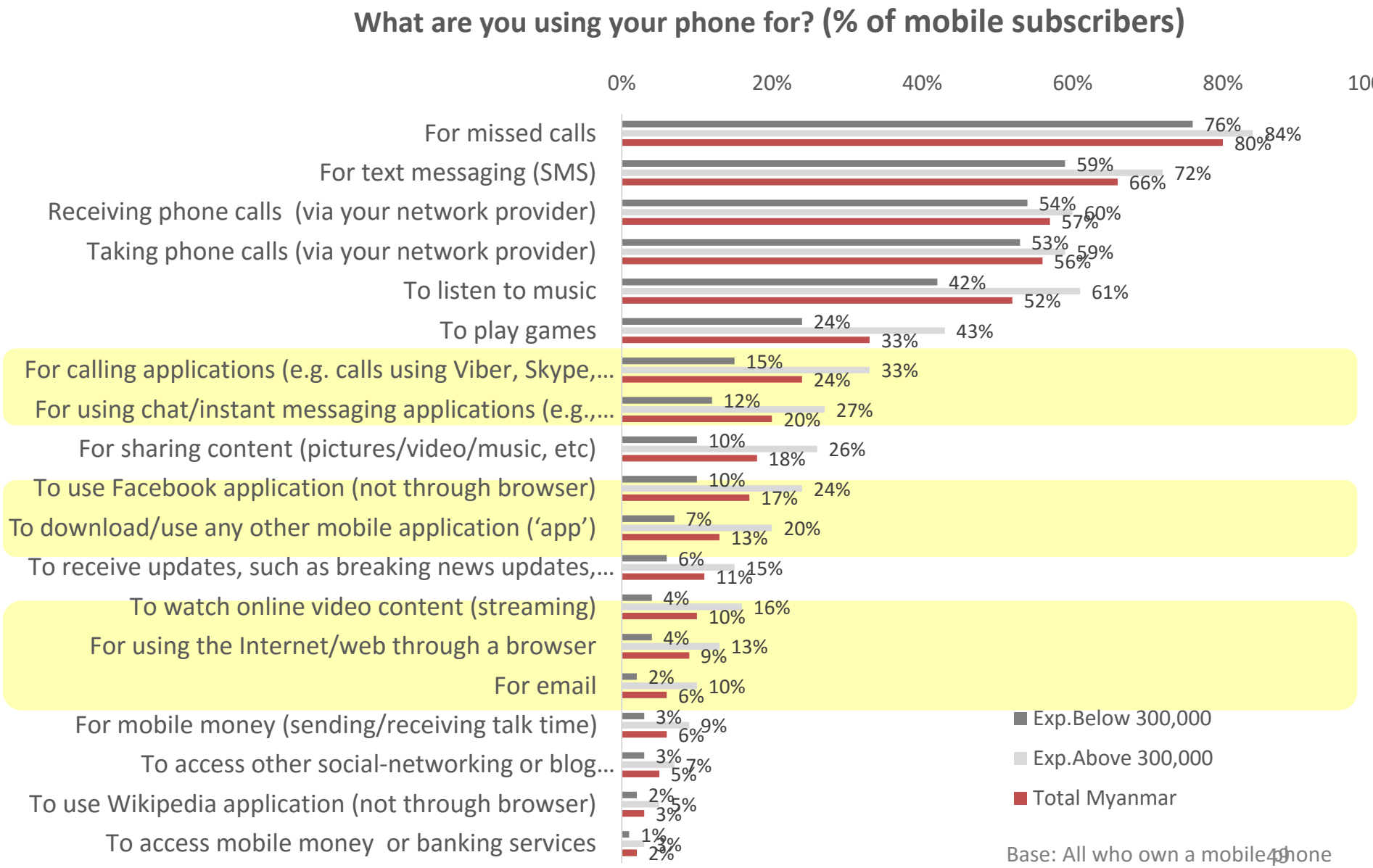
COMPUTER AND INTERNET USE

But Myanmar IS “online” and using the “Internet”



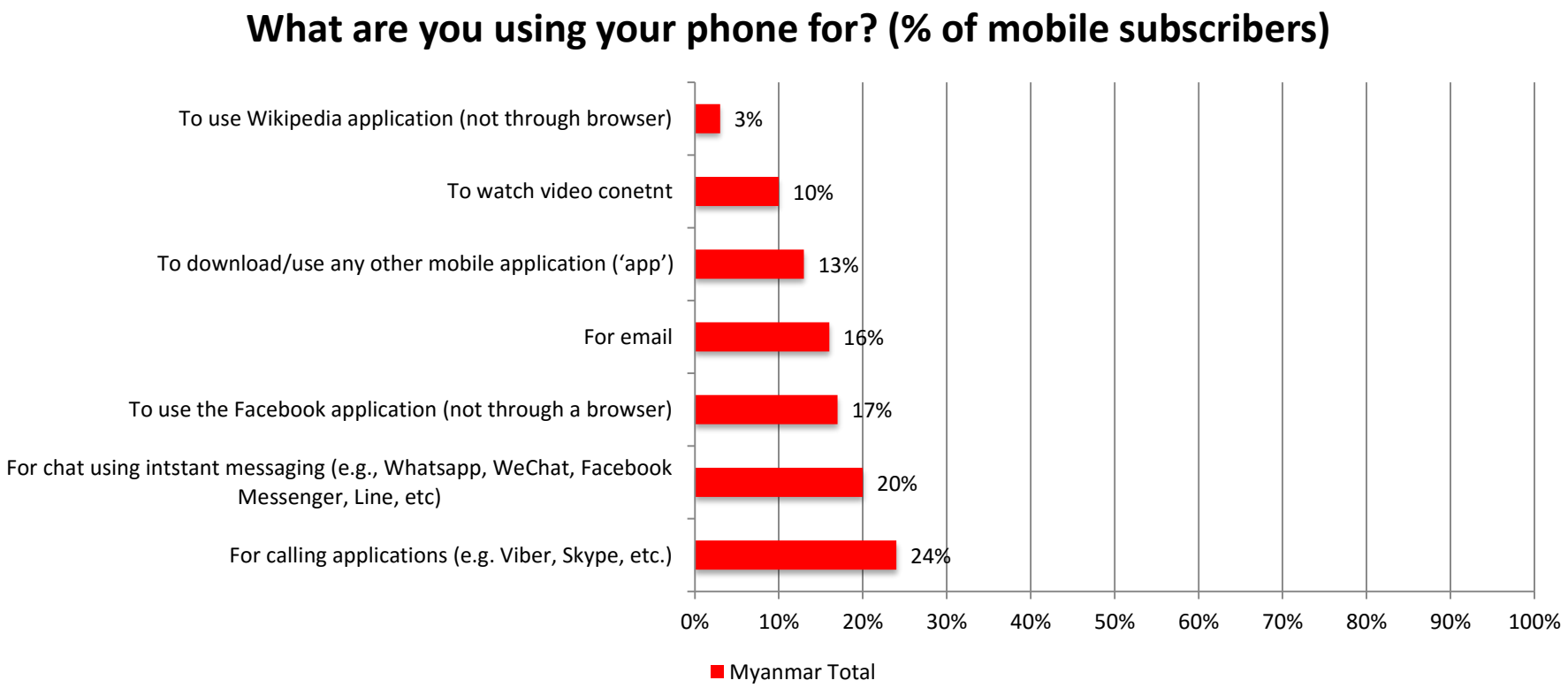
Base: All who own a mobile phone

Even the poor (those at the BOP) ….



Base: All who own a mobile phone

Mobile apps for VOIP, text messaging (WhatsApp, WeChat, Facebook messenger, Line), Facebook popular



6 months after sector reforms, Myanmar way ahead compared to Asian neighbours over a decade after their reforms

	% of BOP mobile owners, 2011						% Myanmar's BOP, 2015
	B'desh	Pakistan	India	S'Lanka	Java	Thailand	
Make phone calls	100	99	100	99	96	100	
Receive phone calls	100	95	99	100	94	99	
Send/receive missed calls	86	71	78	65	54	24	
Send/receive SMS	19	38	23	55	89	37	
Send/receive MMS	1	2	3	5	14	8	
Send/receive e-mail				1	3	2	6%
Browse the Internet	3		1	1	10	5	7-16%
Take photos/video	19	7	8	14	26	19	
Play games	27	21	18	11	31	16	
Listen to radio	13	15	12	17	26	18	
Listen to music	25	5	15	8	26	30	
Share that you have content created	1	1	3	2	8	3	7-16%
Send/receive, download/upload other content	1	1	2	2	6	3	
Use as an organizer	7	5	8	2	15	8	
Check my bill/credit	13	20	11	18	16	3	
Send/receive talk time/load	10	5	2	2	35	0	
Access facebook	1			1	7	2	10%
Access other social networking or blog					2	1	

But 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%

Base : All respondents

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%

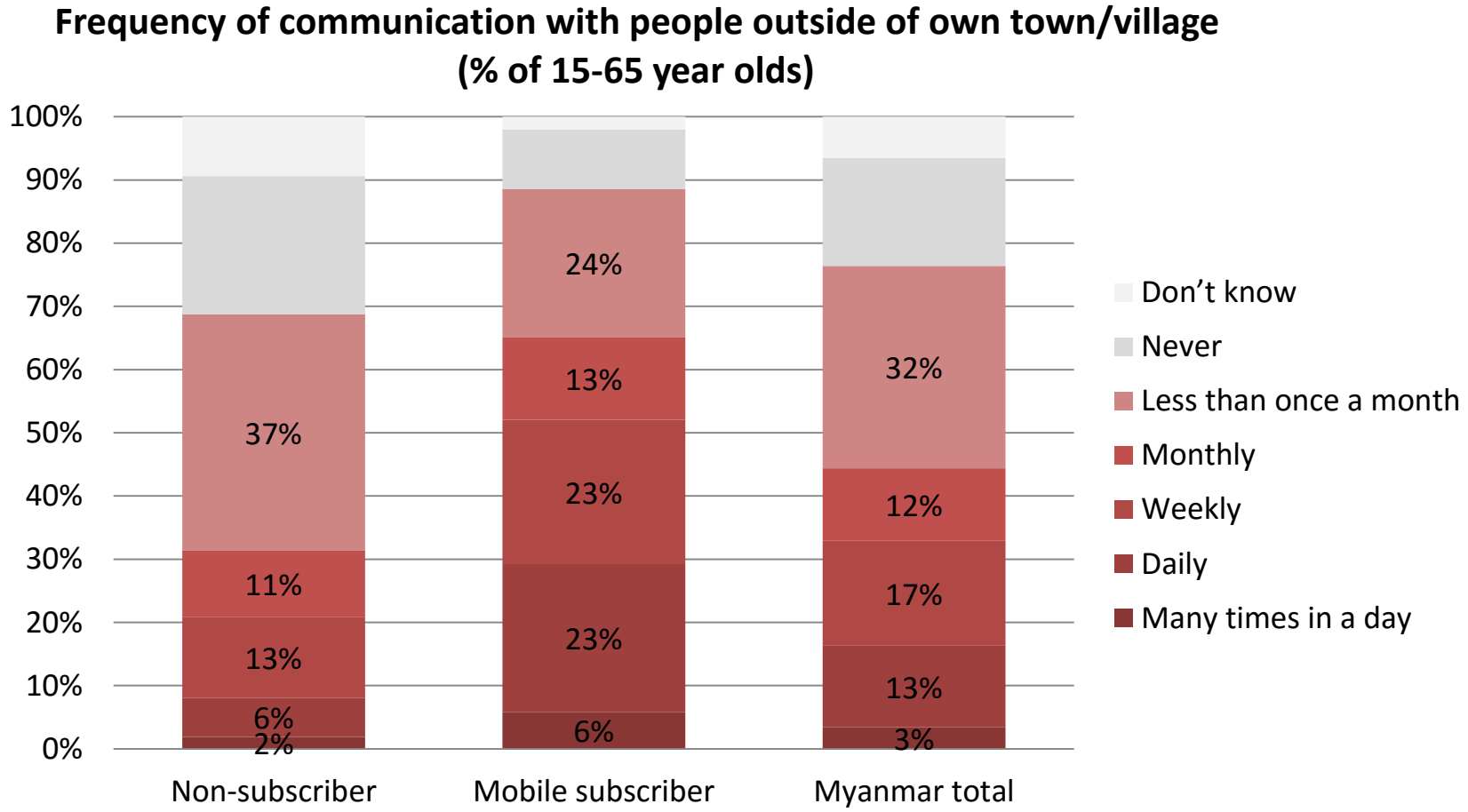
Small base (approx. 200), but all of these users are mobile subscribers; almost 75% of this use is via a mobile Internet browser; more than half use it at least once a day; most frequent use is for Facebook (75%).

Base : All respondents

Baseline survey findings

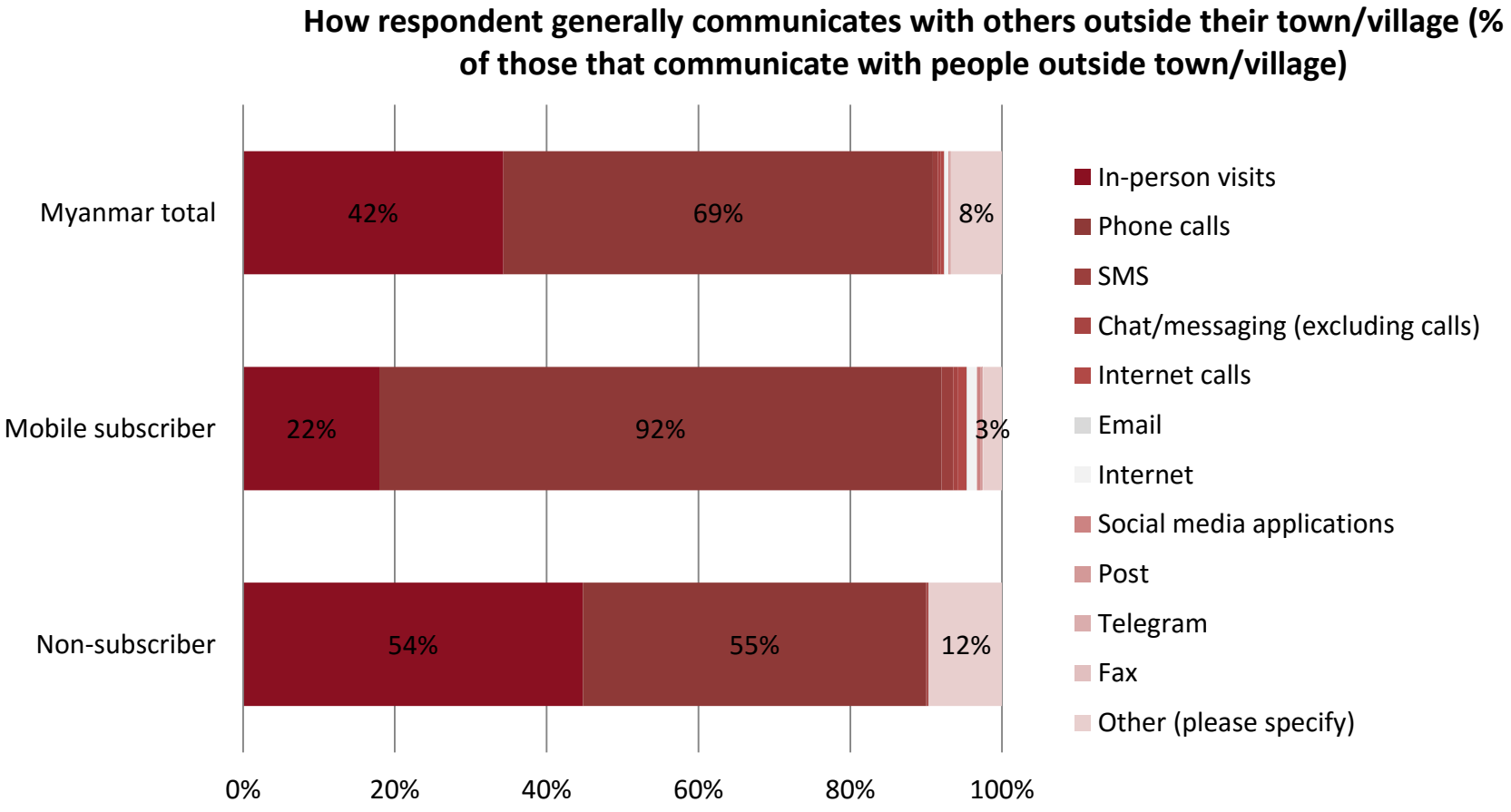
COMMUNICATION HABITS AND INFORMATION NEEDS

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



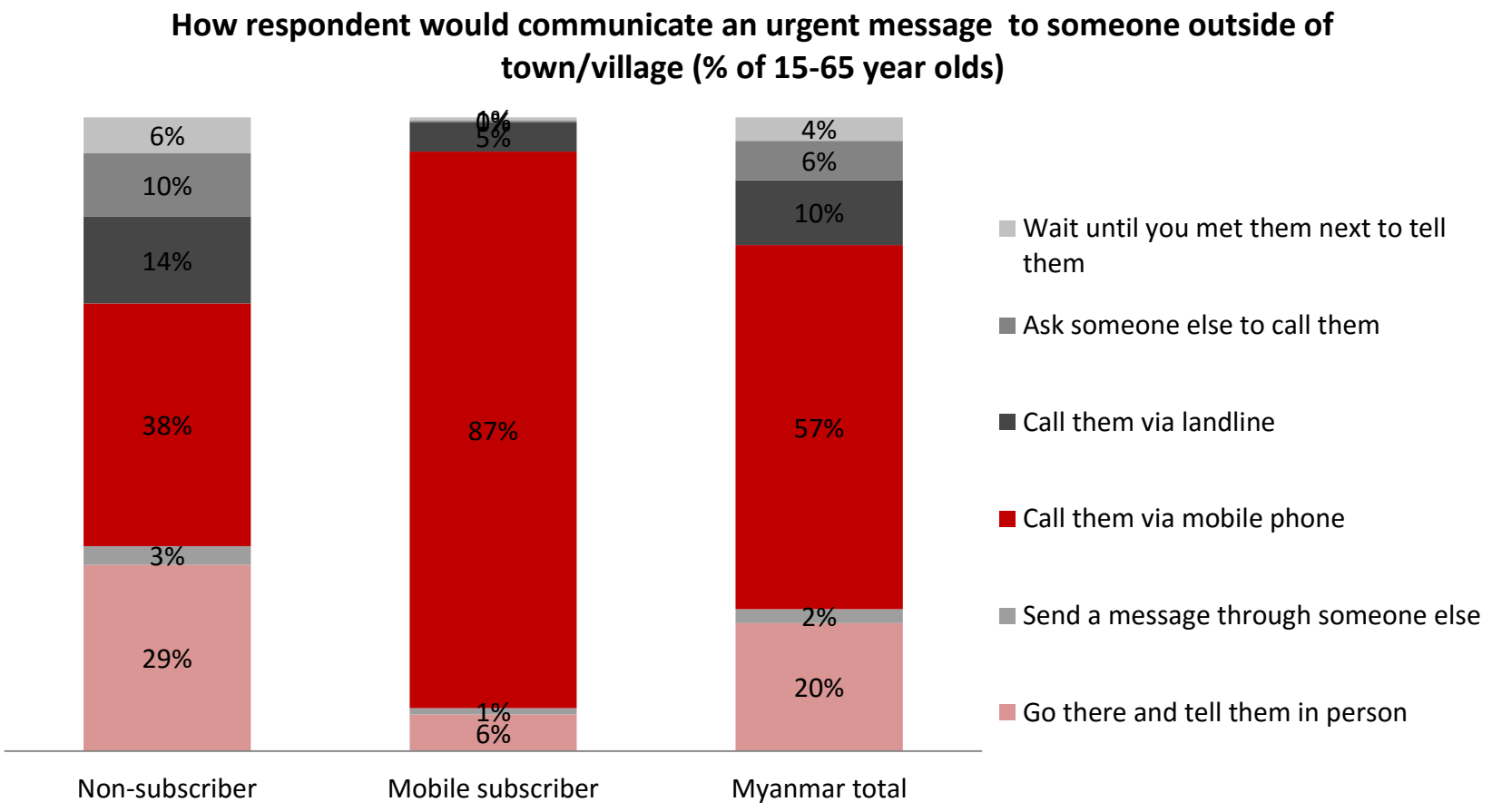
Base: All respondents

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



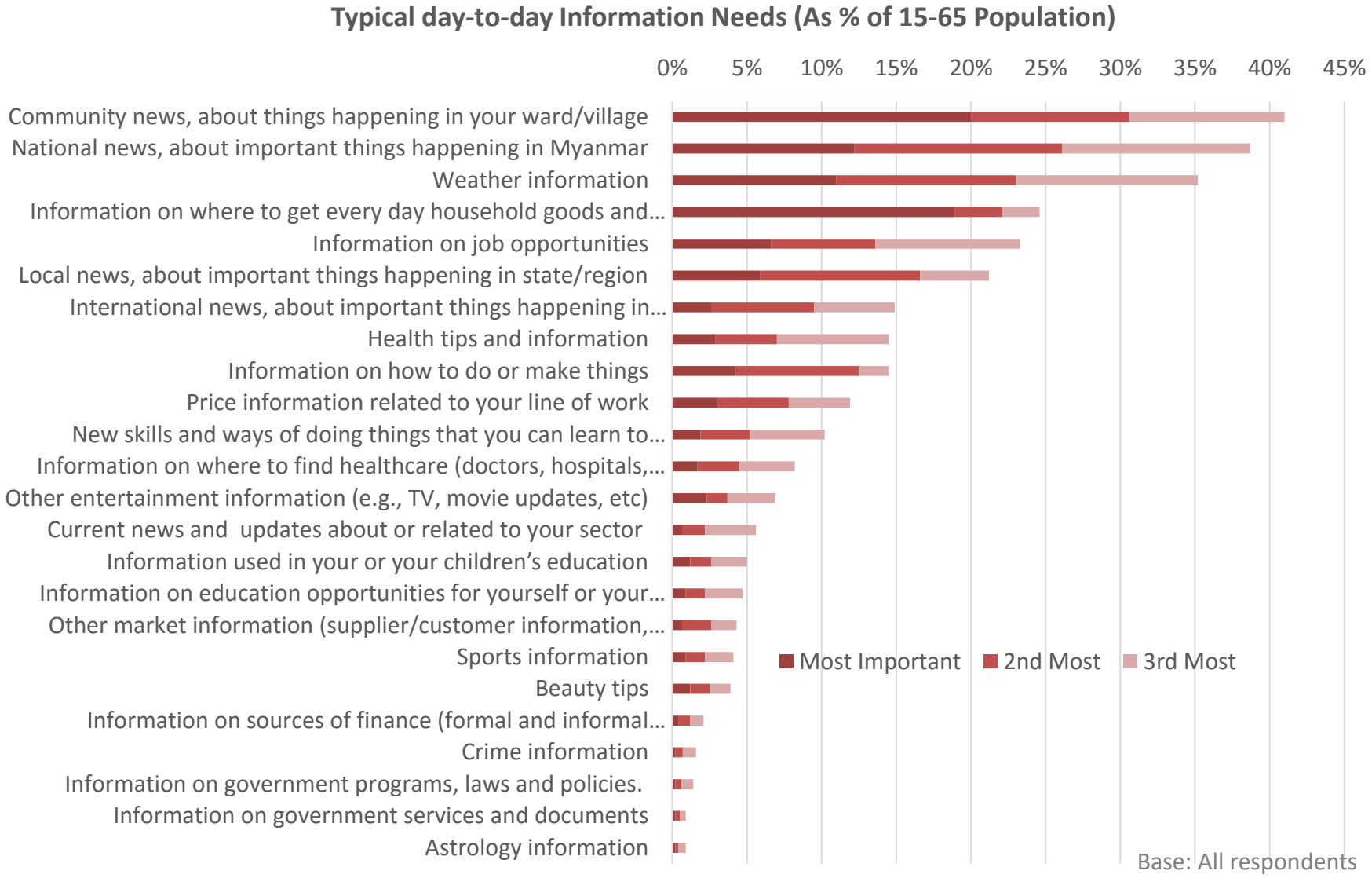
Base: All respondents

Communication in an emergency: mobiles substitute for physical travel

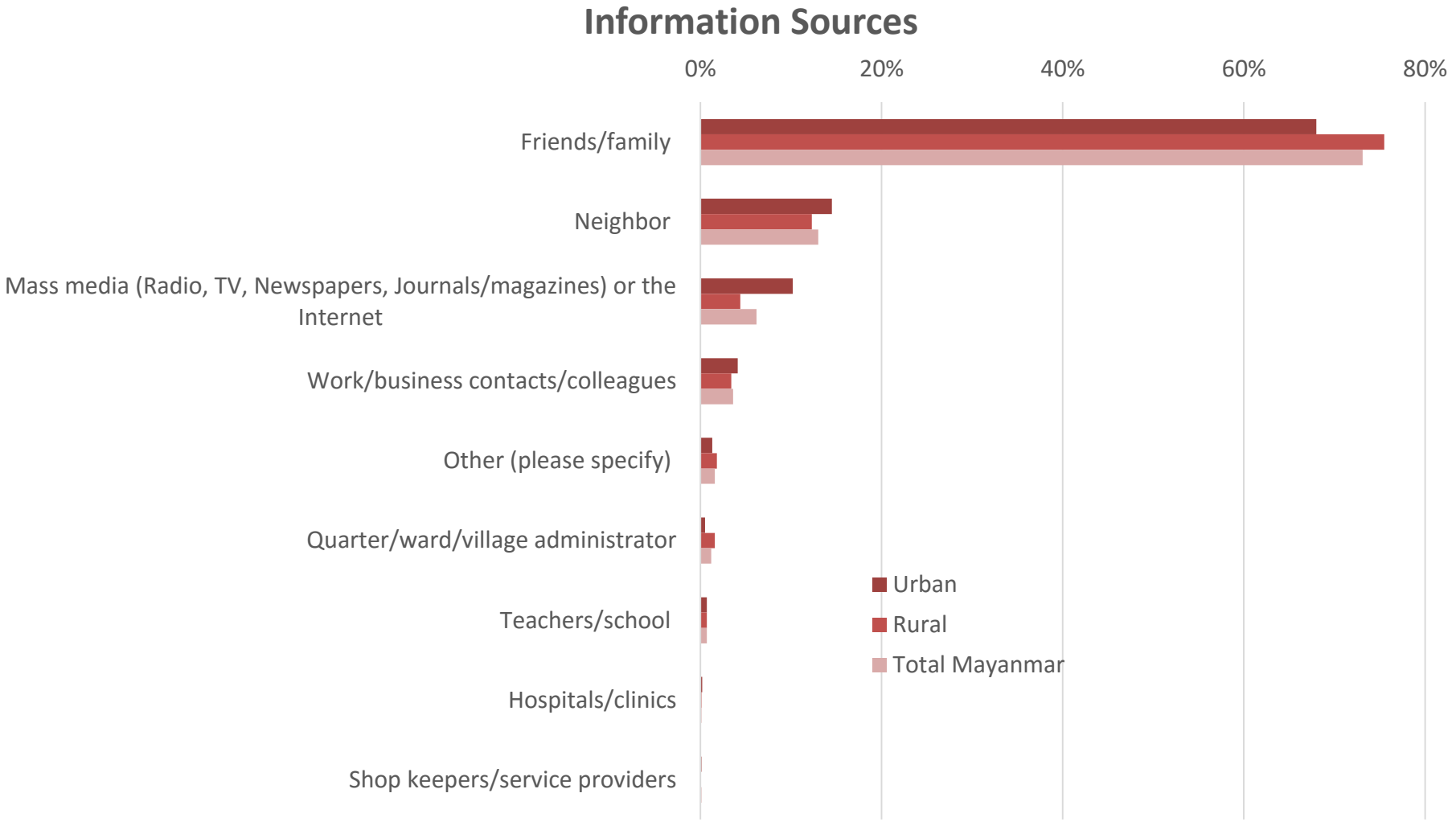


Base: All respondents

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



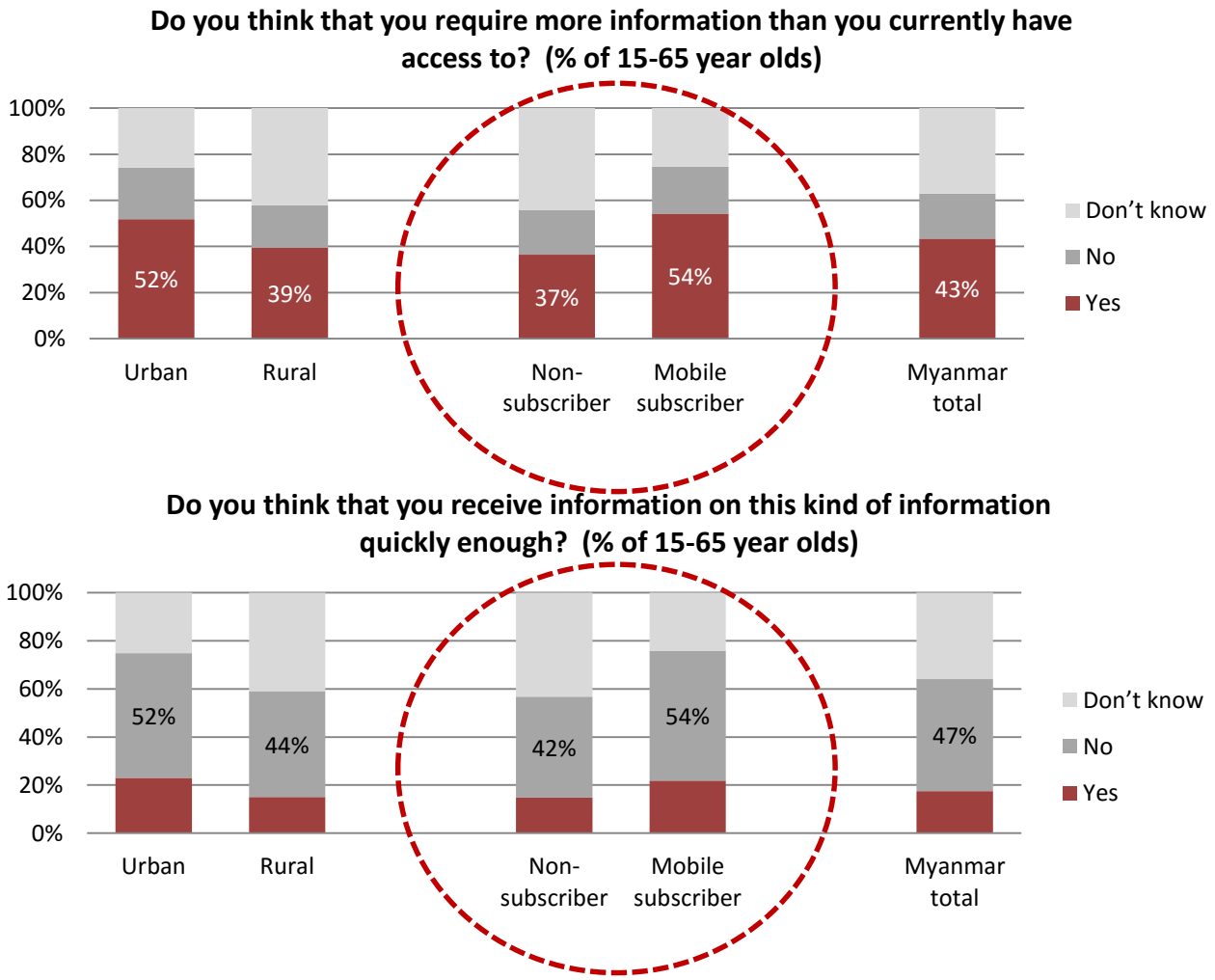
Friends, family and neighborhood are main information sources



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

Base : All respondents

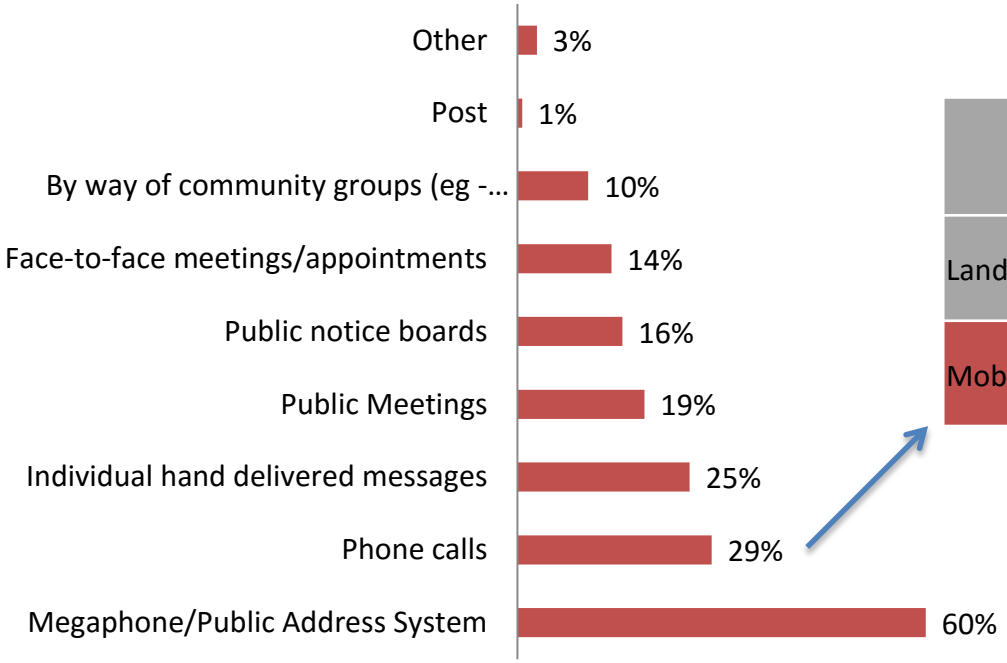
Compared to non-subscribers, mobile subscribers are 'hungrier' for information – want more, faster than currently available



Base: All respondents

Among ward/village leaders, phones are the second most popular way of disseminating information

How Ward/Village leaders disseminate information through the community (% of ward/village leaders surveyed)



		Phone ownership among Ward/Village leaders (%)
Landline	Official	8.3
	Personal	11.4
Mobile	Official	9.6
	Personal	89.2

Base: Ward/Village representatives

Hints at opportunities for efficiencies: information from superiors/peers still based on 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

Baseline survey findings

MOBILE PHONE OWNERSHIP PRECONDITION FOR INTERNET USE

Owning a phone is a pre-condition for Internet use

- Data shows several disadvantaged groups for phone ownership
  - The poor (compared to the rich)
  - Women (when compared to men)
  - Poor women (even when compared to poor men)
- Examine women vs. men further

Baseline survey findings

GENDER, MOBILE PHONES & INTERNET

Qualitative data collection: Focus groups and home visits (in-depth interviews with 91 women *and* men; of varying age, occupation, socioeconomic categories; mobile owners, non-owner users, non-users

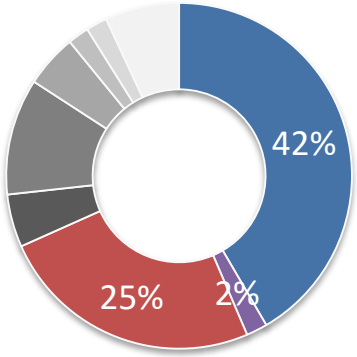
	Female		Male		Total	
	Urban (Yangon)	Rural (Pantanaw)	Urban (Yangon)	Rural (Pantanaw)	Protocols	Participants
Focus group discussions	4	4	1	2	11	66
Home visits	10	10	3	2	25	25
						91

Why don't more women own mobiles? They cannot afford it; they don't 'need' it.

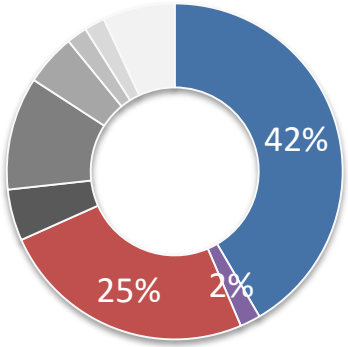
Main reason for not owning a mobile phone

% of non-owners∫

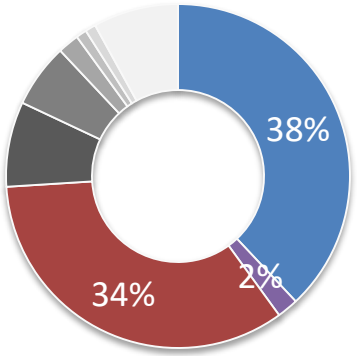
Myanmar non-owners (%)



Male non-owners (%)



Female non-owners (%)



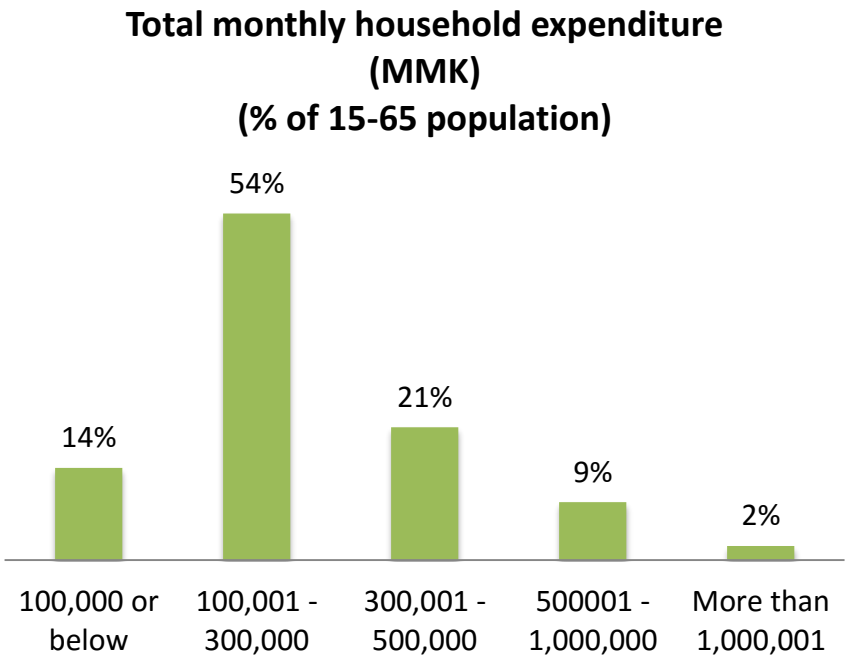
- I cannot afford a handset
- I cannot afford a SIM card
- I have no use for it / don't need one
- I don't know how to use a mobile/too complicated
- No mobile coverage where I live
- My phone is broken
- No electricity where I live to charge mobile phone
- My phone got stolen
- Other

Base: Non-owners

sia Baseline Survey (2015)

What a lack of affordability means

- Most household incomes are low overall (chart, right)
- 50% of women are not employed according to baseline survey



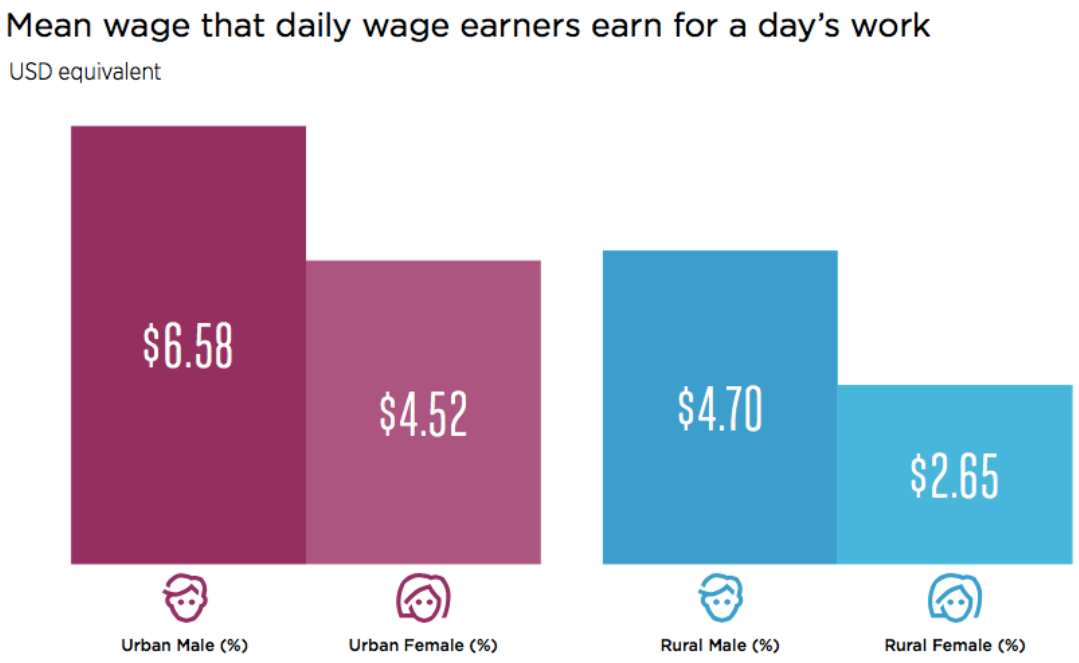
Base: Myanmar households in accessible areas
Source: LIRNE*asia* Baseline Survey (2015)

What a lack of affordability means (continued)

- Women who ARE employed still earn significantly less than

"I sometimes weave mats and earn 300-400 Kyat a day."

Female non-owner, 46, SECD-E, Pantanaw



Note: USD 1 = MMK 1032.49 as of 31 March 2015; includes only daily wage earners

Base: Myanmar households in accessible areas
Source: LIRNE*asia* Baseline Survey (2015)

‘Affordability’ is measured against the cost of a smartphone / ‘touchphone’

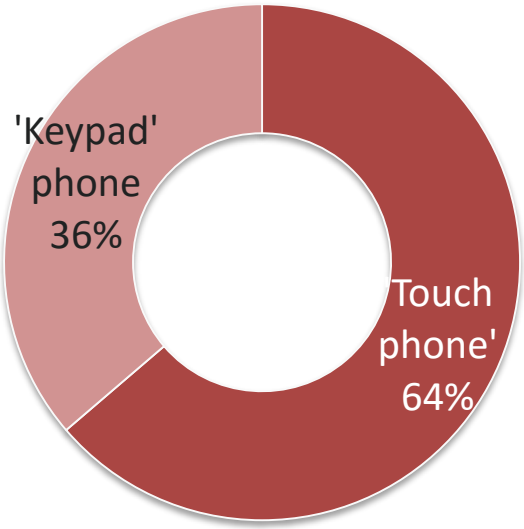
- Some can afford (or have the option) of a keypad phone, but would rather hold out for the opportunity to get a smartphone/ ‘touch phone’
  - Prestige factor
  - To access data services (Facebook, Viber, etc.)
  - For games

“At times [my husband] gives me money to buy a mobile phone. But I have to use it for school fees for my children. And what I want to get is a smart phone, which I can’t afford to buy yet…[The lowest price for a handset is] more than 60,000-70,000 kyats. **But those are not good enough, only handsets that cost more than 1 lakh kyats are good enough to be used...[i.e.,] more durable than the [cheaper] ones.”**

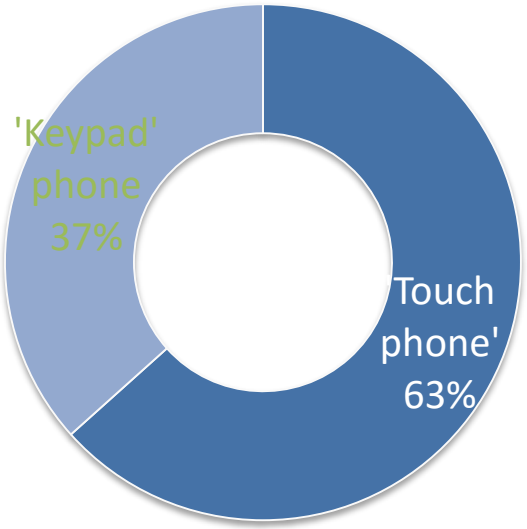
-Housewife, 28, Yangon

Female owners as likely to own a ‘touch phone’ as male

Male mobile owners (%)



Female mobile owners (%)



“A touch phone is high class, and you can play games with it. Keypads are outdated”
-Female FGD respondent, 18-28, SEC C/D, Pantanaw

Base: Day wage earners
Source: LIRNE*asia* Baseline Survey (2015)

Women are usually family/household financial managers or 'CFOs' (Chief Financial Officers)

- Family income is (usually) handed over to the primary female in the house who budgets for the month and ensures money is available for necessities
- They play key role in household decisions, incl. mobile phone adoption
  - Limited product knowledge limits their participation in purchase decision

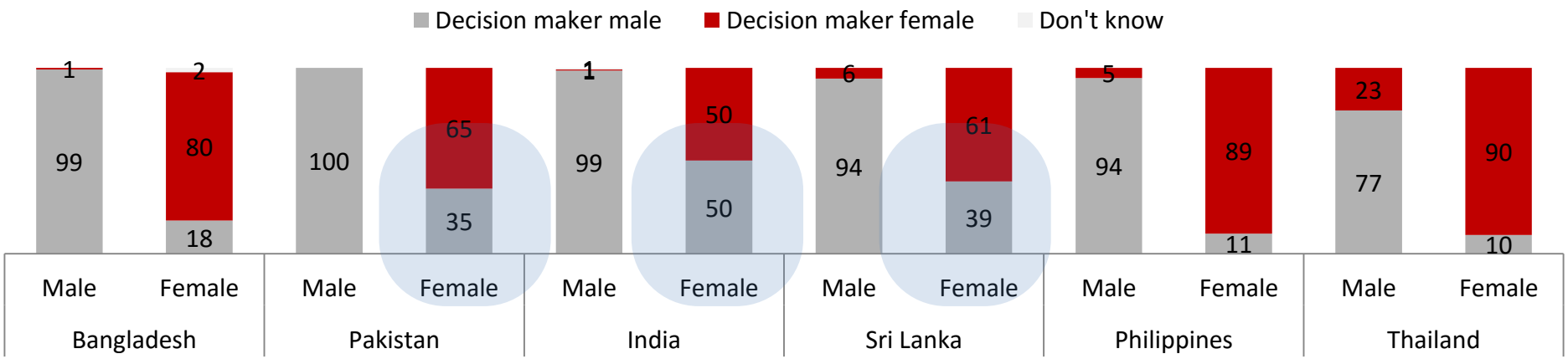
'He gives me the salary when he is paid, all of it. But when he needs some he requests from me. When he goes to work he needs to have meal but there was no one he knows so I have to make sure that he has money.'
Female non-owner, 36, SEC D, Yangon

"Others hold a touchphone so I wanted one, too. My wife agreed and came along when I bought it."
Male owner, Yangon

"My wife complains if I top up too much."
Male owner, 30-45, SEC B/C, Yangon

Different from other Asian countries (2008): women had much less decision-making power over mobile phone purchases, esp. South Asia

Gender of the decision maker regarding mobile phone purchase (% of BOP mobile owners), 2008



Q: Who was the main decision maker in purchasing [your] mobile phone?

Base: BOP mobile owners
Source: LIRNE*asia* Teleuse@BOP3 survey (2008)

But as CFO, they are responsible for whole family. And put others' needs before their own.

They feel the need to to conserve the limited family budget (even at the expense of their needs)

'Women also have to take care of the family. Instead of spending their money on phone charges, they have to use it for food.'
- Female non-owner, 36, SEC D, Yangon

"At times [my husband] gives me money to buy a mobile phone. But I have to use it for school fees for my children. And what I want to get is a smart phone, which I can't afford to buy yet."
-Female non-owner, Housewife, 28, Yangon

"I plan to buy a mobile but we don't have enough income. My wife says that I shouldn't buy one. She is about to give birth so we need to save the money."
Male non-owner, 18-29, SEC D/E Pantanaw

Where the household does get a mobile, women tend to get lowest priority…

- Women's role as the home-maker (rather than the bread-winner) has a strong impact on their becoming mobile owners
- Whoever goes outside of the house gets priority

'Males are the head of the household. You have to favor and respect them. He has to lead the family. Whatever we do, we have to discuss with him.'

- **Female mobile owner, 18-28, SEC C/D, Pantanaw**

'If we could buy another phone, it would be for my husband. The next one will be my brother's. This is because they are working. Only after that will I get my own phone'

-Female, non-owner, 47, Pantanaw

'Males work and have business so they carry the phone. But if the wife has a business she also has one. Today even youngsters and children have a mobile.'

- **-Female mobile owner, 19, SEC C, Yangon**

Many women don't have the skills to use data services fully

- Many women needed help to even place a call
- Women are unable to participate in handset/SIM purchase, so what is purchased may not meet their needs
- Women miss out on the 'introduction' to the mobile at the point of purchase
  - Rely on others (males) for knowledge
- Fear of 'breaking' the phone prevents greater use by women
- Those who knew English faced less difficulties

"We don't fiddle with it a lot because we are concerned that we would damage it. We don't want to waste money. I can't afford a new one."
FGD Yangon, female owners, 18–29, working, SEC B/C

"Males know better how to operate and to repair phones … there are hardly females working in phone shops."
HV Yangon, female owner, 19, SEC C

NEXT STEPS TO UNDERSTANDING MYANMAR USERS…

Ongoing/planned research

- Right now, teams in the field conducting follow-up survey
  - What has changed since last year?
  - What has been the impact of mobile phone rollout?
- July/August: qualitative research to understand how users respond to subsidized/free data packages/bundles
  - E.g. Free Basics
- See you in October/November, with some answers ☺