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

Helani Galpaya

July 2015, Yangon and Nay Pyi Taw

This work was carried out with the aid of a grant from the International Development Research Centre, Canada and the Department for International Development UK..

About LIRNE*asia*

- Our mission:
  - *"Catalyzing policy change through research to improve people's lives in the emerging Asia Pacific by facilitating their use of hard and soft infrastructures through the use of knowledge, information and technology."*

Countries that we engage with

MIDO

- www.myanmarido.org
- Myanmar-based non-governmental organization, focusing on Information and Communication Technology for Development (ICT4D) and Internet Policy.
- Vision: to narrow the digital divide between rural and urban Myanmar, with the application of ICT in socioeconomic sectors with the aim of reducing poverty and promoting inclusiveness.
- Headed by a board of directors, MIDO has full-time and part-time staff, as well as volunteers.
- Conducts nationwide capacity building in ICTs and engages in research with the aim of strengthening the core development goals of Myanmar.

Third Eye

- Myanmar based market research firm (selected through a competitive procurement process)
  - Carried out field work (including pilot testing of questionnaire)
- Created in October 2013 as a joint venture between Decision Support Service (DSS) and an international investor group with extensive marketing and research background.
- With its roots in social research, Third Eye has now expanded into the consumer arena.
- Experienced in a wide range of services including market research, social, economic, and poverty studies.
- Also provide analytical support for the data that they collect.

LIRNEasia and MIDO: Research, capacity building, policy interventions

- Demand-side research on ICT needs and uses
  - With GSMA, Gendered ICT use in Myanmar: qualitative research (2015)
  - Nationally representative survey on ICT needs and usage in Myanmar (2015)
  - Qualitative study of 124 low income urban micro-entrepreneurs (2014)
- Detailed Comments on the telecom legislation and regulations (2014)
- Training of 18 Parliamentarians from 6 political parties (2014)
  - on ICT Sector Policy making and regulation
- Training of civil society organizations, government and private sector on ICT sector policy making, regulation, monitoring of sector performance, and on how to be good consumers of research
  - 2014, with IDRC & OSI funding
  - 2013, together with World Bank and GSMA, during the licensing process
- Translation and publication of books into Myanmar language (2014)
  - Ling, Donner (2009). *Mobile Communication*
  - Elder, Samarajiva, Gillwald, Galperin (2013). *Information Lives of the Poor*

New research

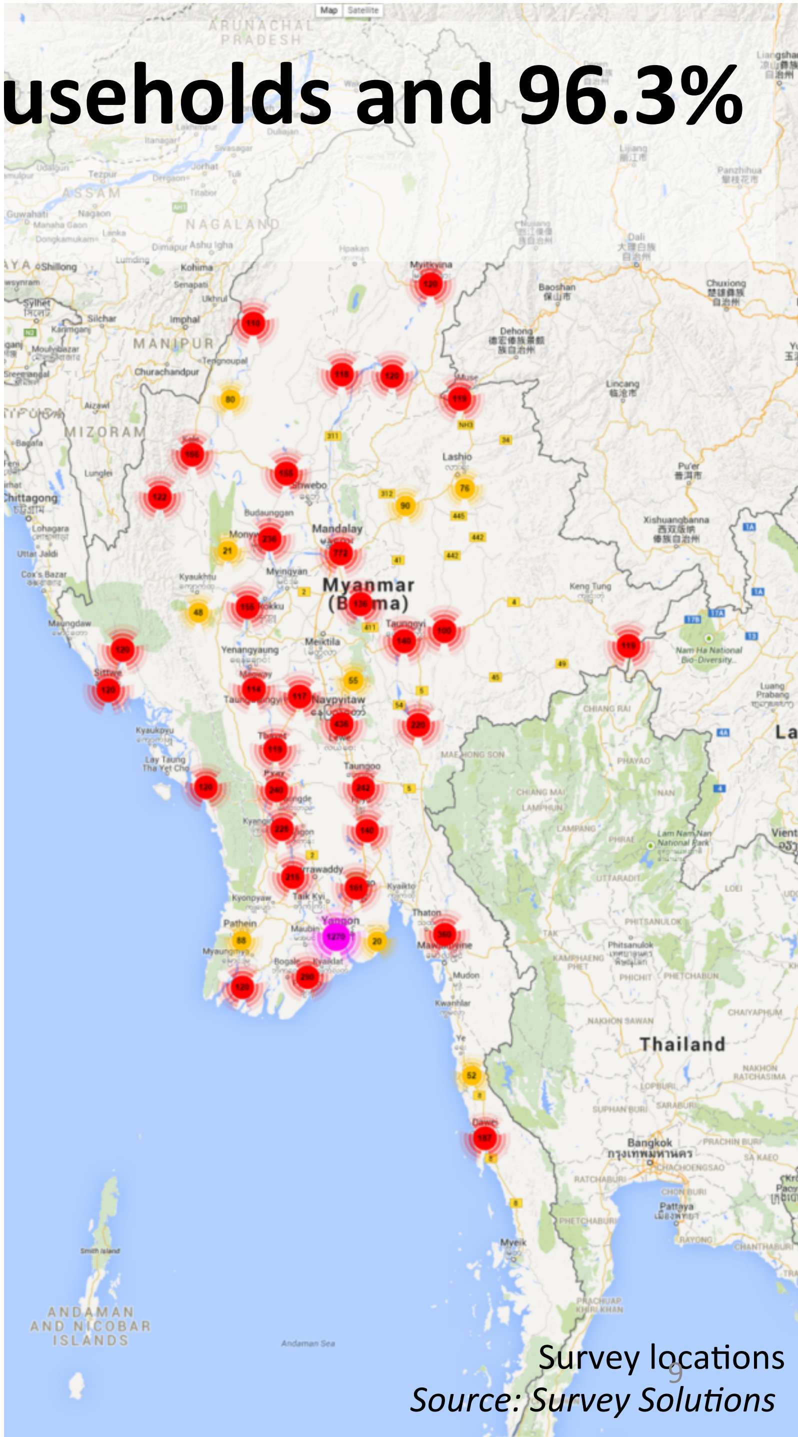
NATIONALLY REPRESENTATIVE BASELINE SURVEY ON ICT NEEDS AND USAGE IN MYANMAR

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

- Purpose: 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 computer aided personal interviewing (CAPI)
  - 8,138 households
    - Household questionnaire (from household head)
    - Individual questionnaire (one individual aged 15-65, randomly selected)
  - 420 'clusters' (urban=wards; rural=village tracts)
    - Cluster characteristics
    - Mobile network signal 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

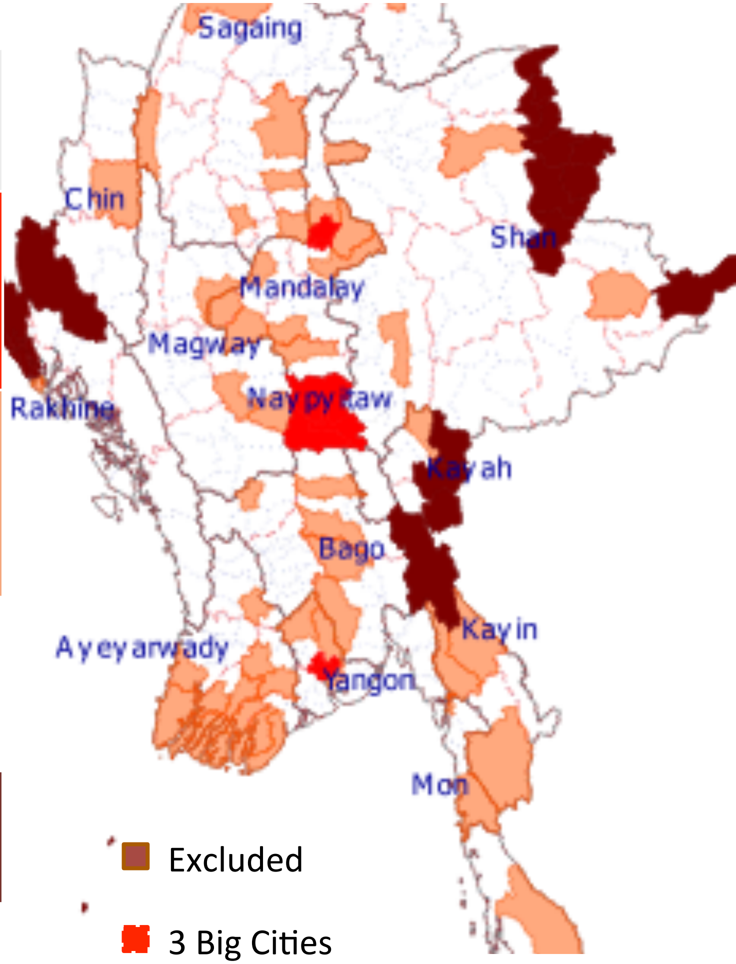
- At 2.5% margin of error, representative of
  - 96.3% population aged 15-65
  - 97% of total households
  - 91.8% of total population
- In all accessible areas of Myanmar
  - 32 townships excluded due to security concerns
- Stratified four stage PPS cluster sampling design used; stratification by:
  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/wp-content/uploads/2015/07/LA-MM-baseline-methodology-note.pdf



Survey locations
Source: Survey Solutions

Population size stratification (main strata)

	Criteria	Townships	Population (%)
Big cities (Yangon, Mandalay, Nay Pyi Taw)	Population >1m	46	15.7
Other major cities/ townships**	Population 0.25-1m	51	28.4
Smaller townships	Population <0.25m	201	52.3
Excluded townships	Inaccessible	32	3.6



Excluded

3 Big Cities

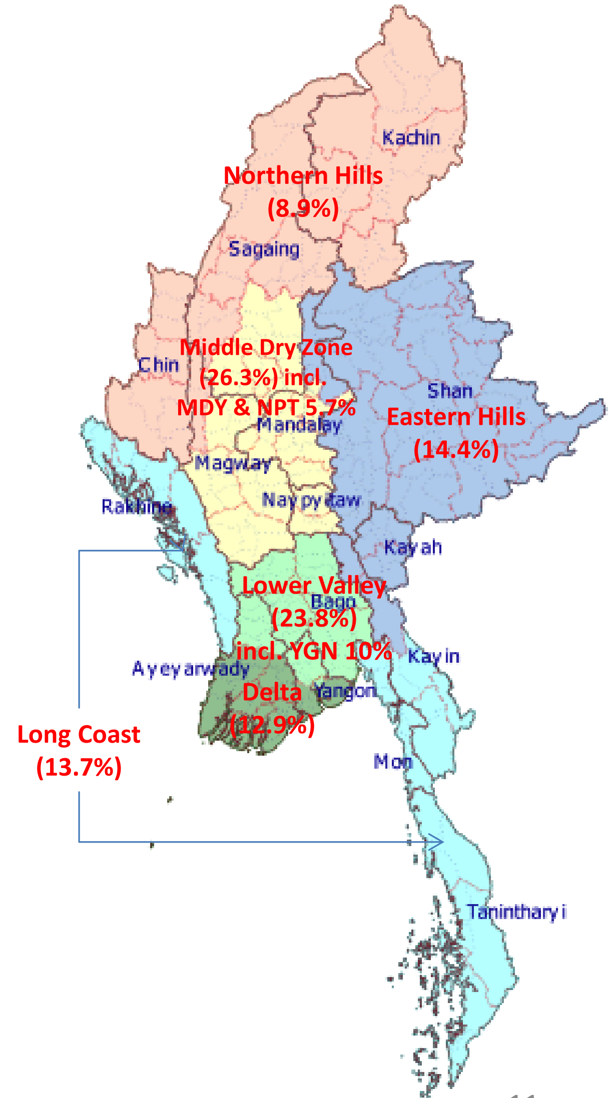
Other Major Cities/ Townships

Smaller Townships

Based on Provisional Results of 2014 Population & Housing Census of Myanmar
**Township consists of urban towns and wards as well as rural village tracts and villages*
****Also includes a few important townships in terms of administration and resources*

Geographic stratification

	Population (%)
Northern hills	8.9
Middle dry zone (incl. Mandalay and Nay Pyi Taw)	26.3
Eastern hills	14.4
Lower valley (incl. Yangon)	23.8
Delta	12.9
Long coast	13.7



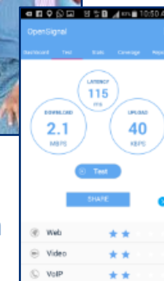
Data collection at multiple levels

Sampling Stage	Sampling Unit	Number selected
Stage 1	Township	70 townships
Stage 2	Wards (urban) + VTs (rural)	2 wards + 4 VT per township
Stage 3	Segment: Street/ block (urban) +Village (rural)	2 streets per ward + 2 villages per VT
Stage 4	Household	10 HH per Segment

n=420

1a. Ward / village administrator interview

1b. OpenSignal network data collection

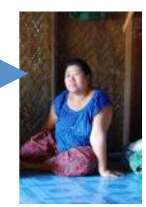


1c.. Grocery price collection

n=8,138

2a. HH head interview

2b. Randomly selected HH member interview



Data collection at multiple levels (detailed)

Level	Data collected	Method	Who/where data was collected from	Representation
Cluster (ward / village)	Cluster characteristics	Personal interview	Ward or village administrator	No
	Network strength + quality	Field staff recorded	Open Signal mobile app	No
	Grocery prices	Field staff collected	Main local grocery shop	No
Household	Household characteristics; ICT access	Personal interview	HH head or suitable alternative	MM households living in accessible areas (97%)
Individual	Individual characteristics; ICT use, ownership, needs	Personal interview	Randomly selected HH member aged 15-65	Population aged 15-65 (96.3%)

Single household

Selection procedure (detailed)

Stage	Number selected	Sampling frame	Method of selection
Stage 1	70 townships	List of townships in order of # of HH [as per 2014 National Census]	PPS systematic sampling with 2 replicates
Stage 2	2 wards + 4 VT per township	List of Wards/VTs in sample townships in order of # of HH [as per 2014 National Census]	PPS Systematic sampling
Stage 3	2 streets per ward + 2 villages per VT	List of segments in sample wards/VTs in order of # of HH [obtained on the field from local administrator]	PPS Systematic sampling
Stage 4	10 HH per Segment	none; HHs within sample segment listed on the field	Random walk following right-hand-rule starting from pre-determined starting points using fixed intervals (urban:7 HH, rural:3 HH)
After Household data collected from HH head			
	1 individual per HH	List of HH members aged 15-65 in order of age	Kish grid (random number chart)

HH – Household; VT – Village tract

Myanmar population and survey sample

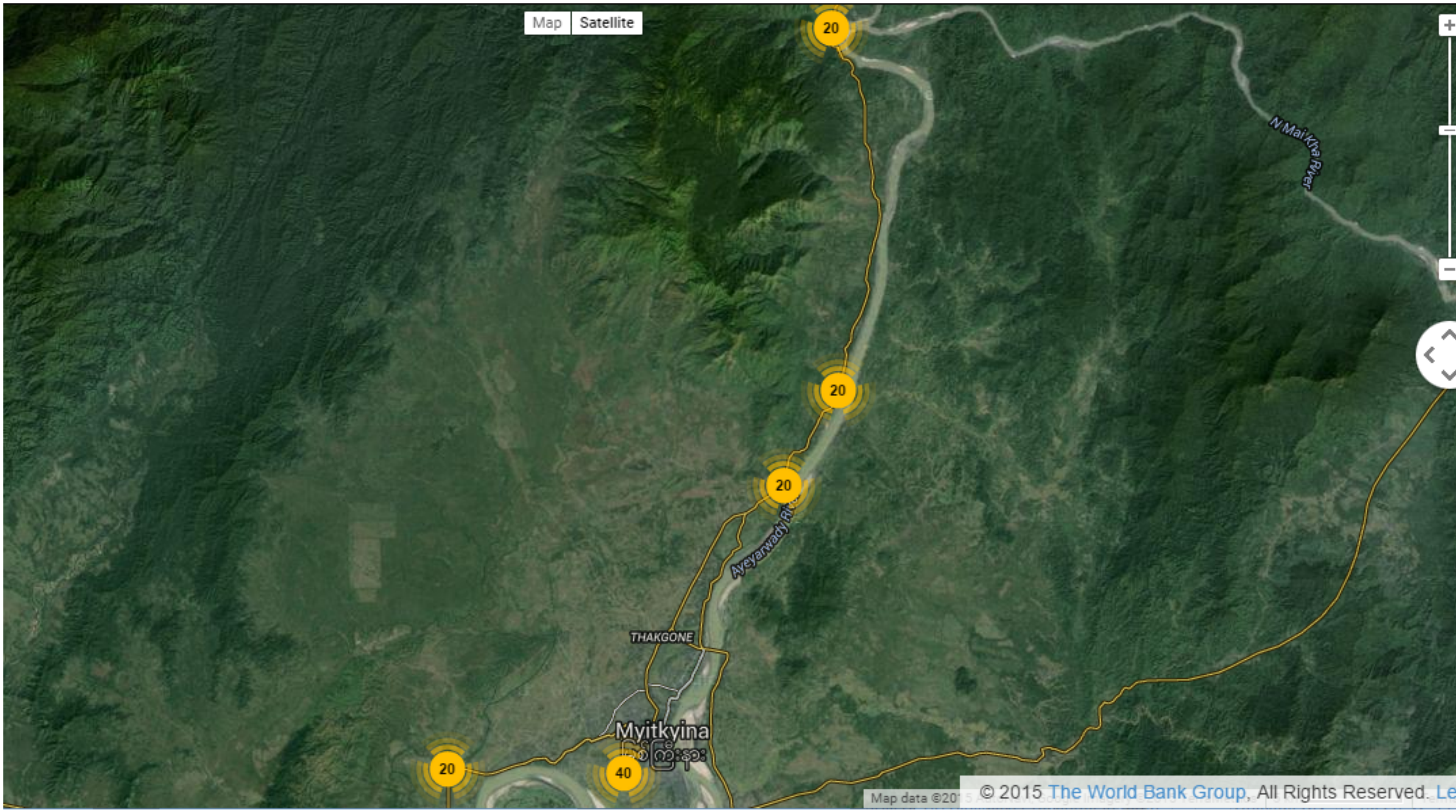
State/ Region	Total (millions)	Urban (millions)	Rural (millions)	Urban (% of total)	Rural (% of total)	Urban-Sample	Rural-Sample	Total sample
Ayeyawady	6.2	0.9	5.3	14.1%	85.9%	320	640	960
Bago	4.9	1.1	3.8	22.0%	78.0%	320	640	960
Chin	0.5	0.1	0.4	20.9%	79.1%	40	80	120
Kachin	1.6	0.6	1.1	35.9%	64.1%	80	160	240
Kayah	0.3	0.1	0.2	25.3%	74.7%	40	80	120
Kayin	1.5	0.3	1.2	21.9%	78.1%	40	80	120
Magway	3.9	0.6	3.3	15.1%	84.9%	240	480	720
Mandalay	6.1	2.1	4.0	34.8%	65.2%	440	400	840
Mon	2.1	0.6	1.5	27.8%	72.2%	80	160	240
Nay Pyi Taw	1.2	0.4	0.8	32.5%	67.5%	240	240	480
Rakhine	2.1	0.4	1.7	16.9%	83.1%	120	240	360
Sagaing	5.3	0.9	4.4	17.1%	82.9%	280	560	840
Shan	5.8	1.4	4.4	24.0%	76.0%	320	640	960
Tanintharyi	1.4	0.3	1.1	24.0%	76.0%	80	160	240
Yangon	7.4	5.2	2.2	70.1%	29.9%	1,040	160	1,200
Total	**50.2**	**14.9**	**35.3**	**29.6%**	**70.4%**	**3,680**	**4,720**	**8,400**

Townships excluded from sampling frame due to inaccessibility/security concerns (approx. 3% of population)

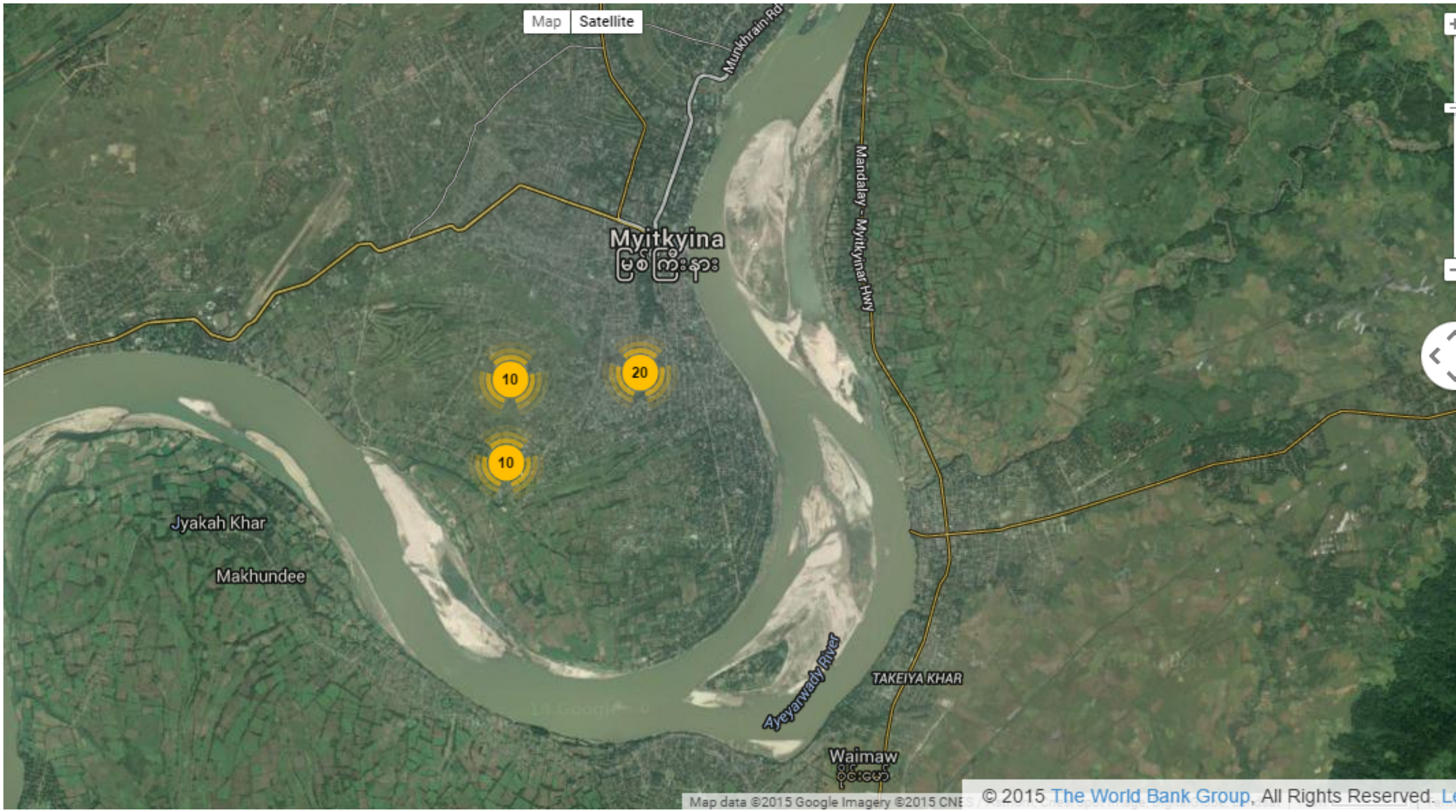
Townships Survey Not Carried Out

Northern Hills	Eastern Hills	Delta	Long Coast
Chipwi	Bawlakhe	Cocokyun	Buthidaung
Hpakan	Hopang		Maungdaw
Injangyang	Hpapun		Rathedaung
Khaunglanhpu	Konkyan		
Lahe	Kunlong		
Lay Shi	Laukkaing		
Machanbaw	Matman		
Nanyun	Mese		
Nawngmun	Mongmao		
Paletwa	Mongyawng		
Puta-O	Narphan		
Sumprabum	Pangsang		
Tanai	Pangwaun		
Tsawlaw	Shadaw		

Illustration: Locations of surveys in Myitkyina, Kachin State



Locations of surveys in Myitkyina: Urban



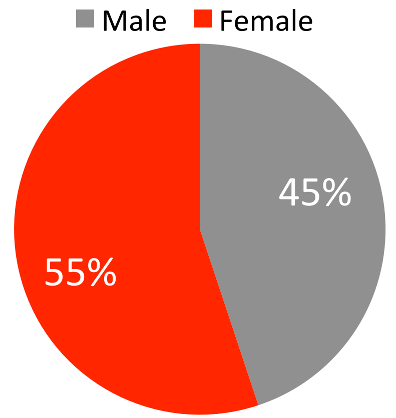
Locations of surveys in Myitkyina: Rural (Tan Pe Village (at Ayeyarwaddy Myitsone)

Information gathered

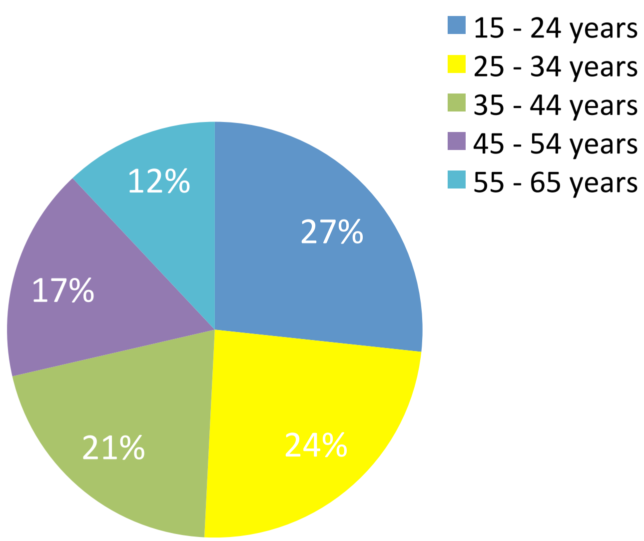
- Household Survey
  - Characteristics of household members
  - Housing and living status
  - Household expenditure and income
  - Respondent's profiles
  - ICT Use
  - Information sources, needs and access
  - Perceived impact of ICTs
- Cluster Survey
  - Part 1
    - Cluster profile
    - Access to town/ facilities
    - Mobile coverage
    - Administrator duties/ Provision of government services
    - Livelihood
    - Access to market/ school/ health facility
  - Part 2: Mobile signal data
  - Part 3: Grocery prices

SAMPLE PROFILE

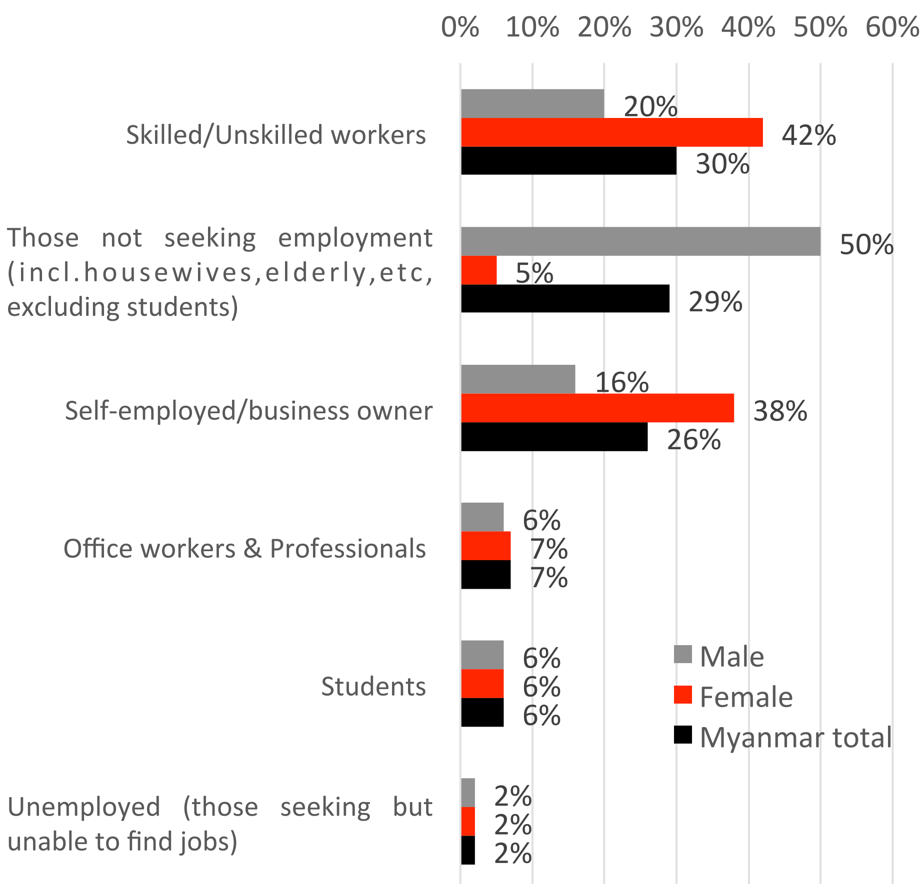
Gender composition (% respondents)



Age distribution (% respondents)

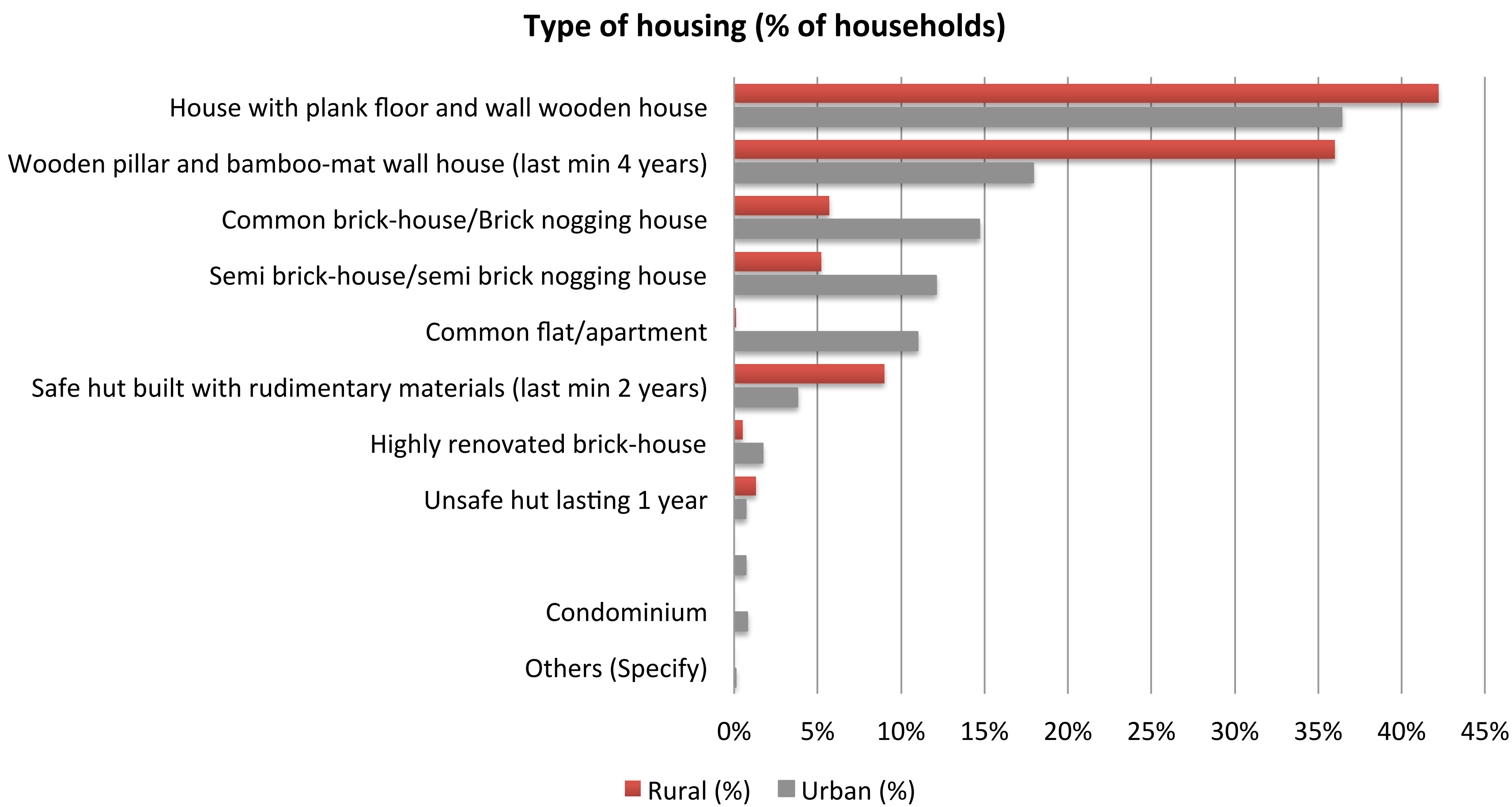


Occupation (as % of population aged between 15-65)



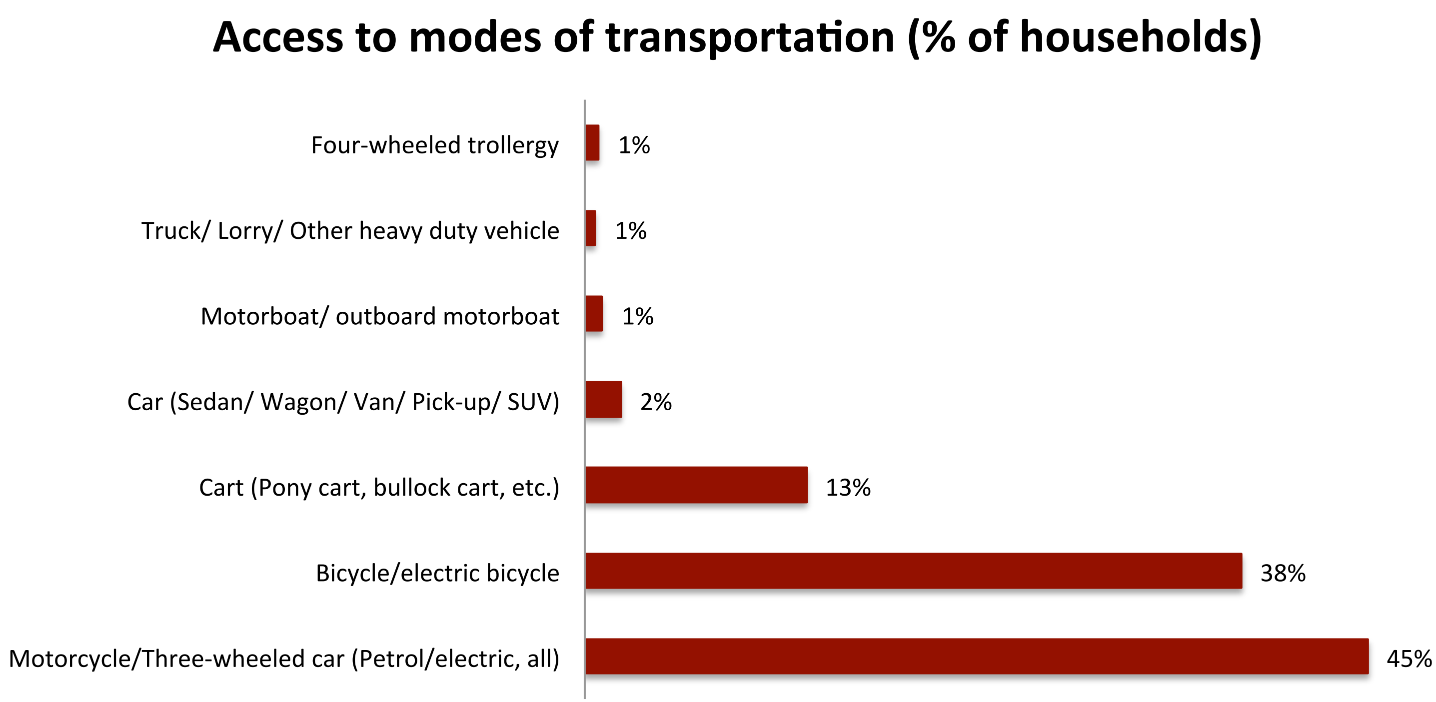
Base: All aged 15-65 respondents selected by Kish grid

Wooden houses dominate



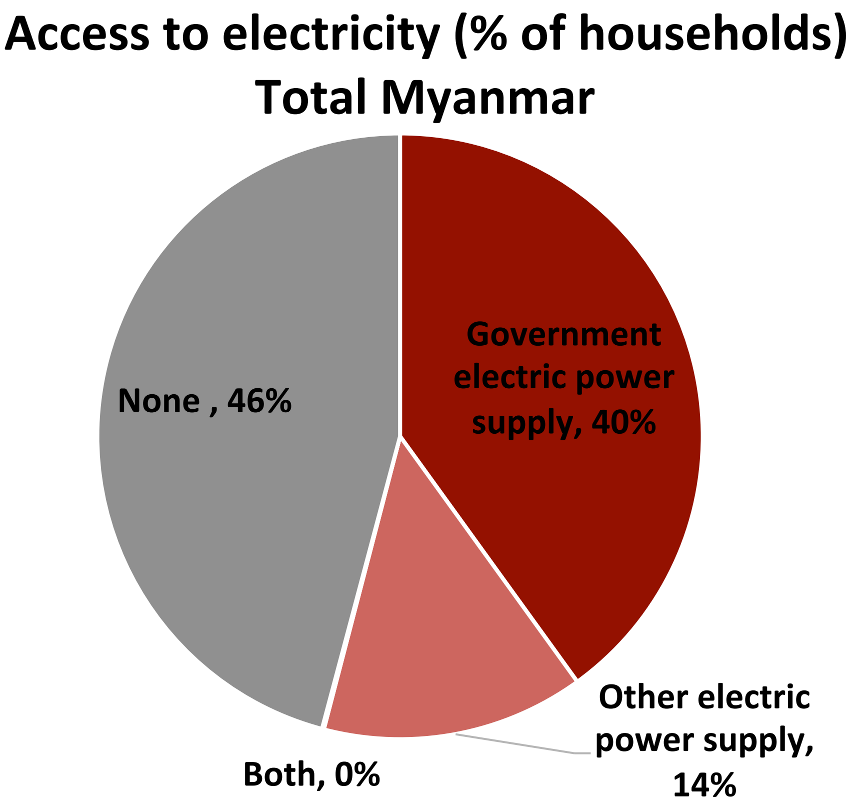
Base: All households surveyed

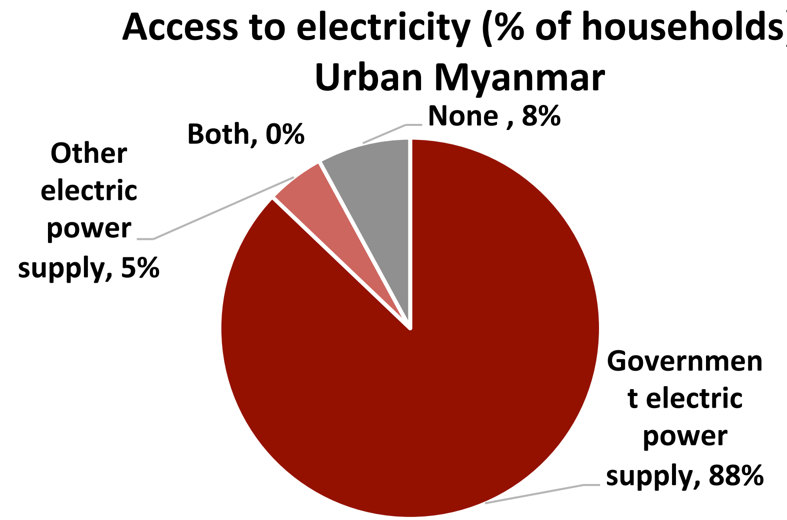
Motorcycles, three-wheeled cars and bicycles most common

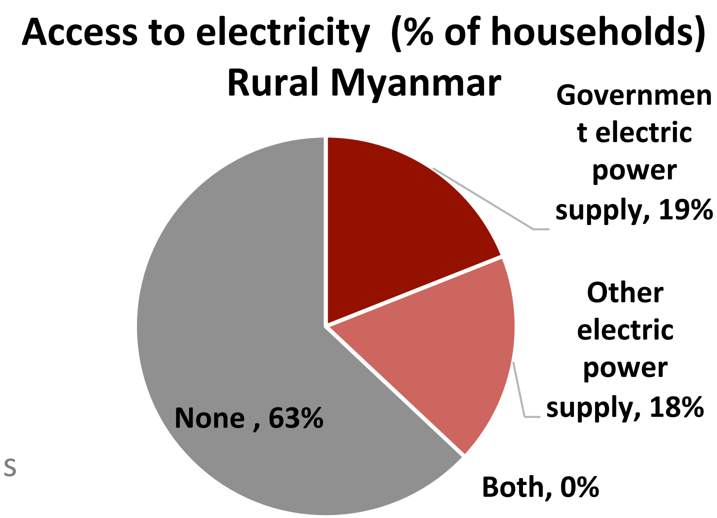


Base: All households surveyed

41% households have govt. power supply. 54% have some form of electricity







Base: All households

Important Note: A previous version of this slide (shown in Yangon and Nay Pyi Taw, July 2015 **<u>mistakenly</u>** had the total electrification rate at 64%. That 64% referred to unweight/raw sample data. This slide corrects the error by using weights, and extrapolates to all households in the country. Our apologies for the confusion.

…higher than Myanmar census data from a year ago

Main type of energy for lighting = Electricity (% of households)

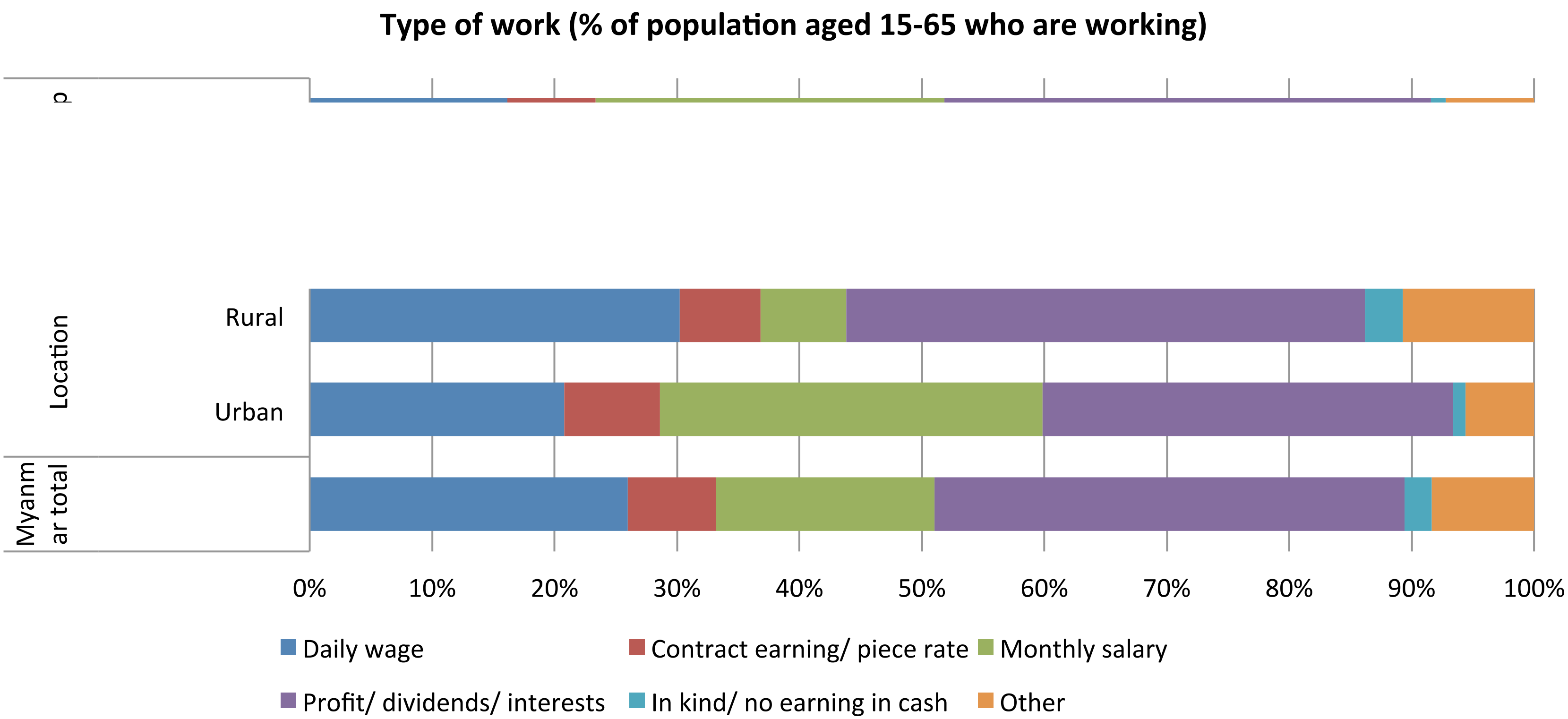
Based on Myanmar Census data (2014)		
Total Myanmar	Urban Myanmar	Rural Myanmar
32.4 %	77.5%	14.9%

Field work done in Mar/Apr 2014

Does your household have access to government electric power supply or other electric power supply?

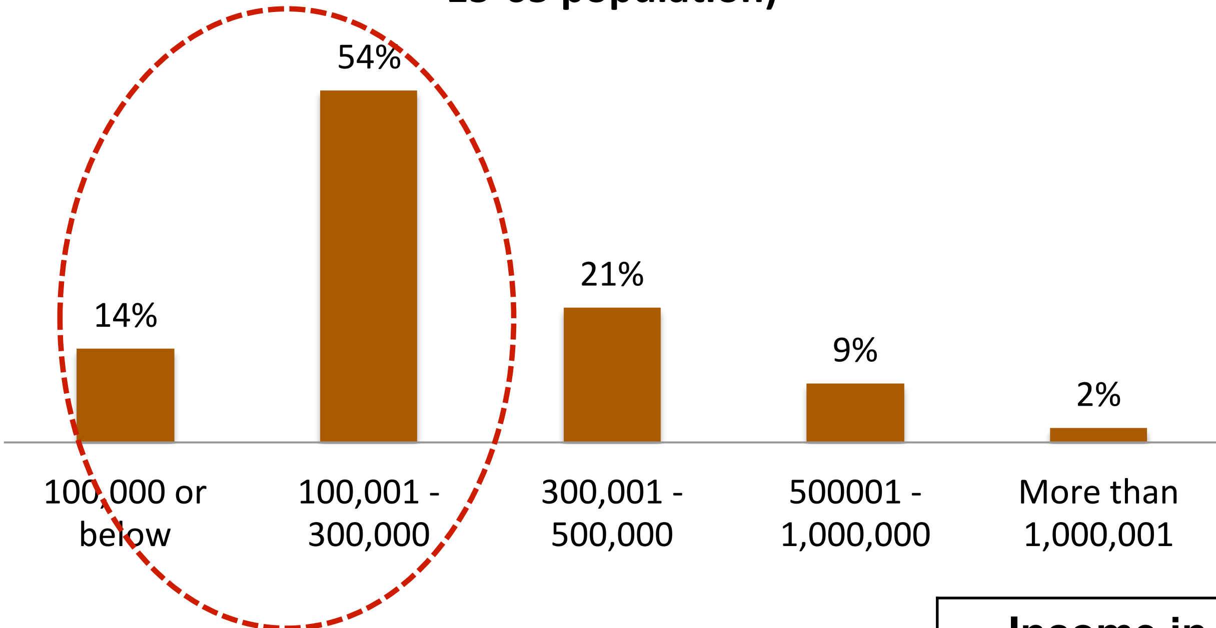
	Based on LIRNEasia survey data (2015)		
	Total Myanmar	Urban Myanmar	Rural Myanmar
Govt. electricity supply	40 %	88%	19%
Other electric power	14%	5%	19%
Total	54%	93%	37%

Field work done in Feb/Mar 2015



Base: All aged 15-65 individuals who are working

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



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

SEC Grid for Myanmar (based on household income)

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

Base: All households surveyed

Baseline survey findings

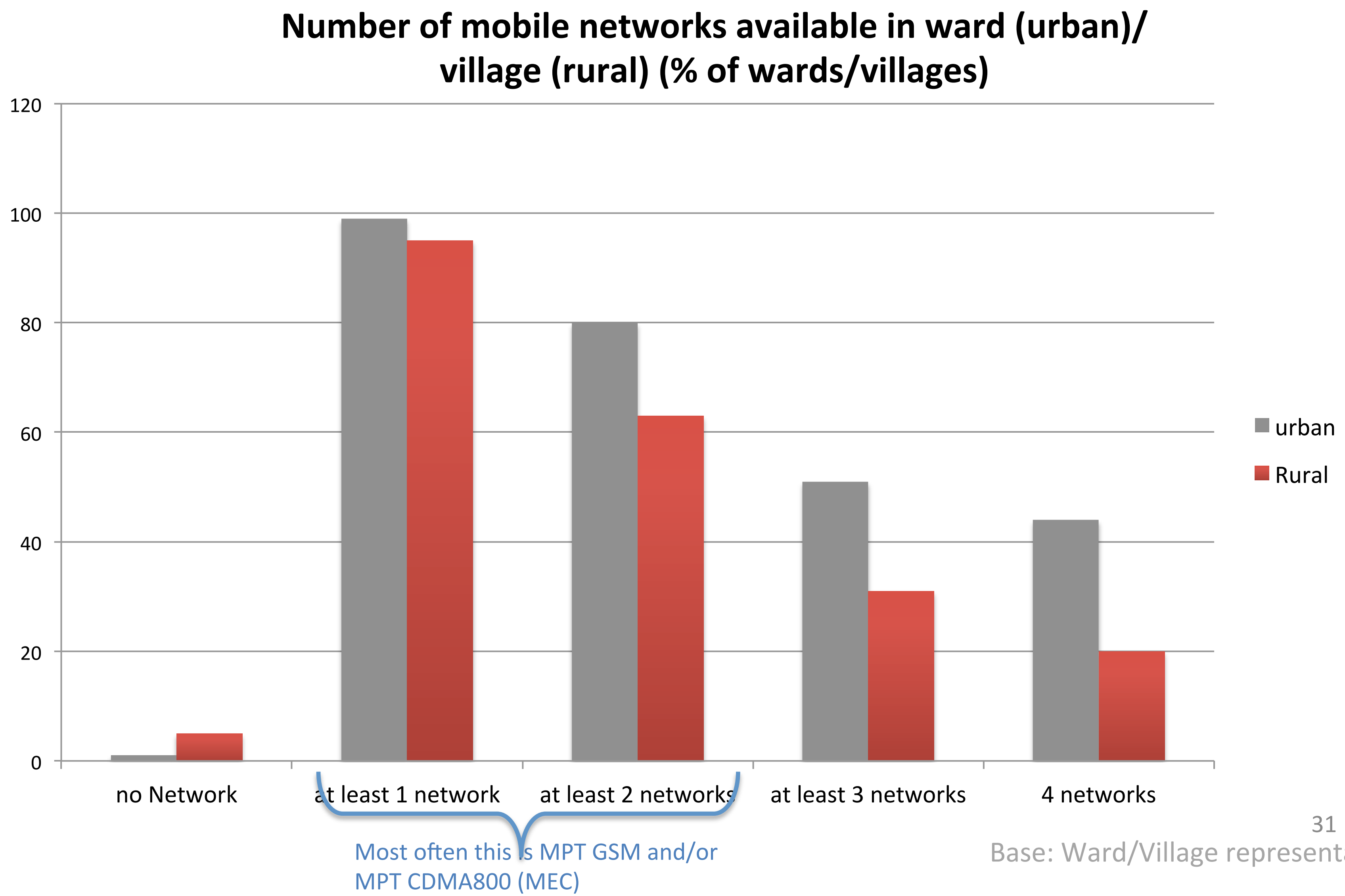
ACCESS

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%

Base: Ward/Village representatives

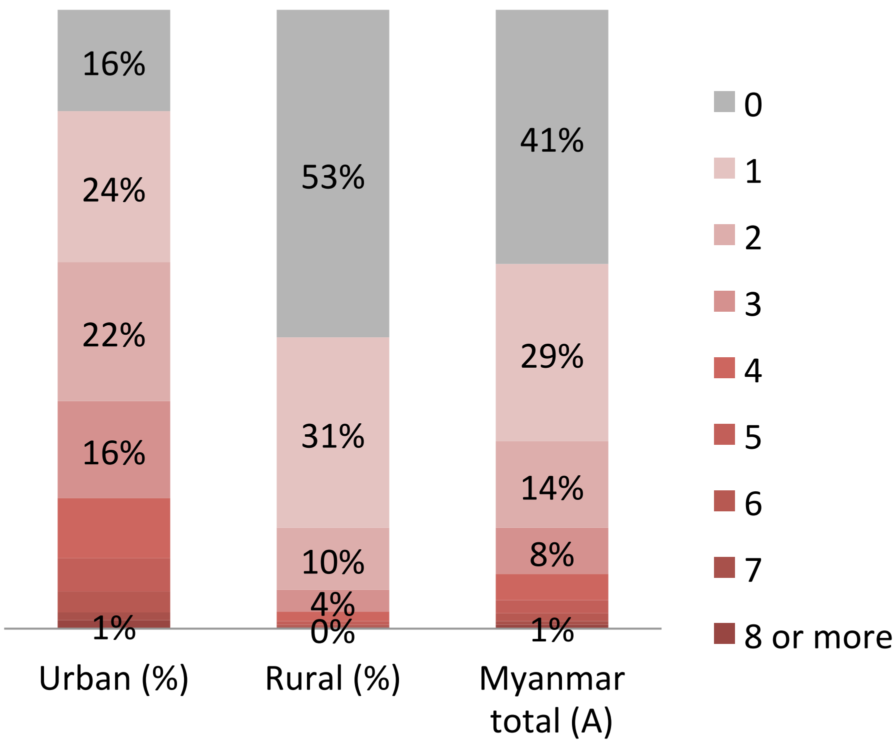
Urban consumers have more choice among suppliers



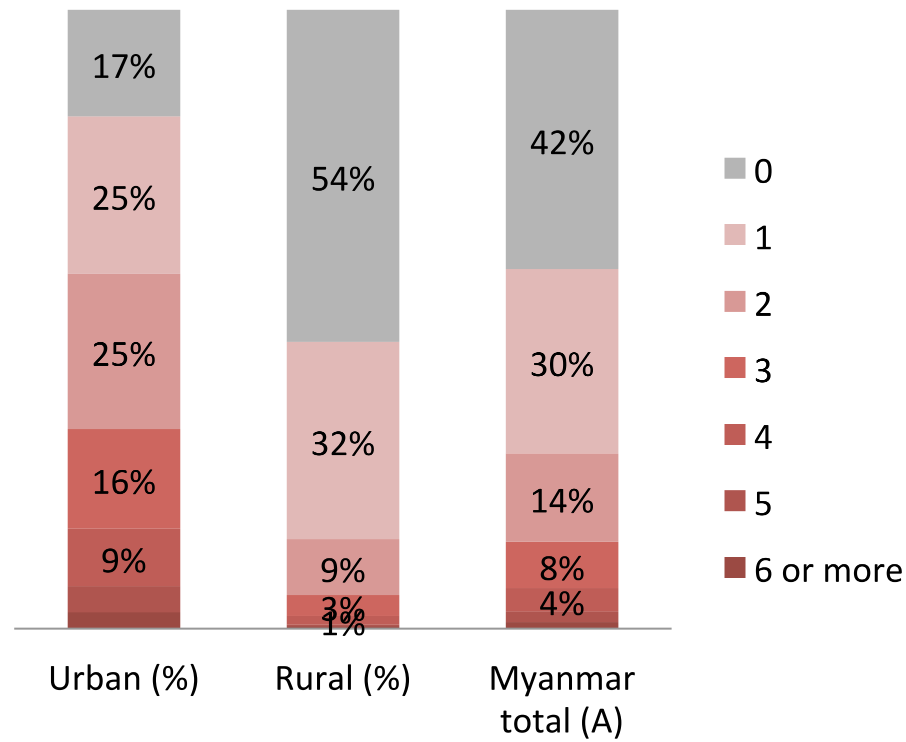
Base: Ward/Village representatives

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

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



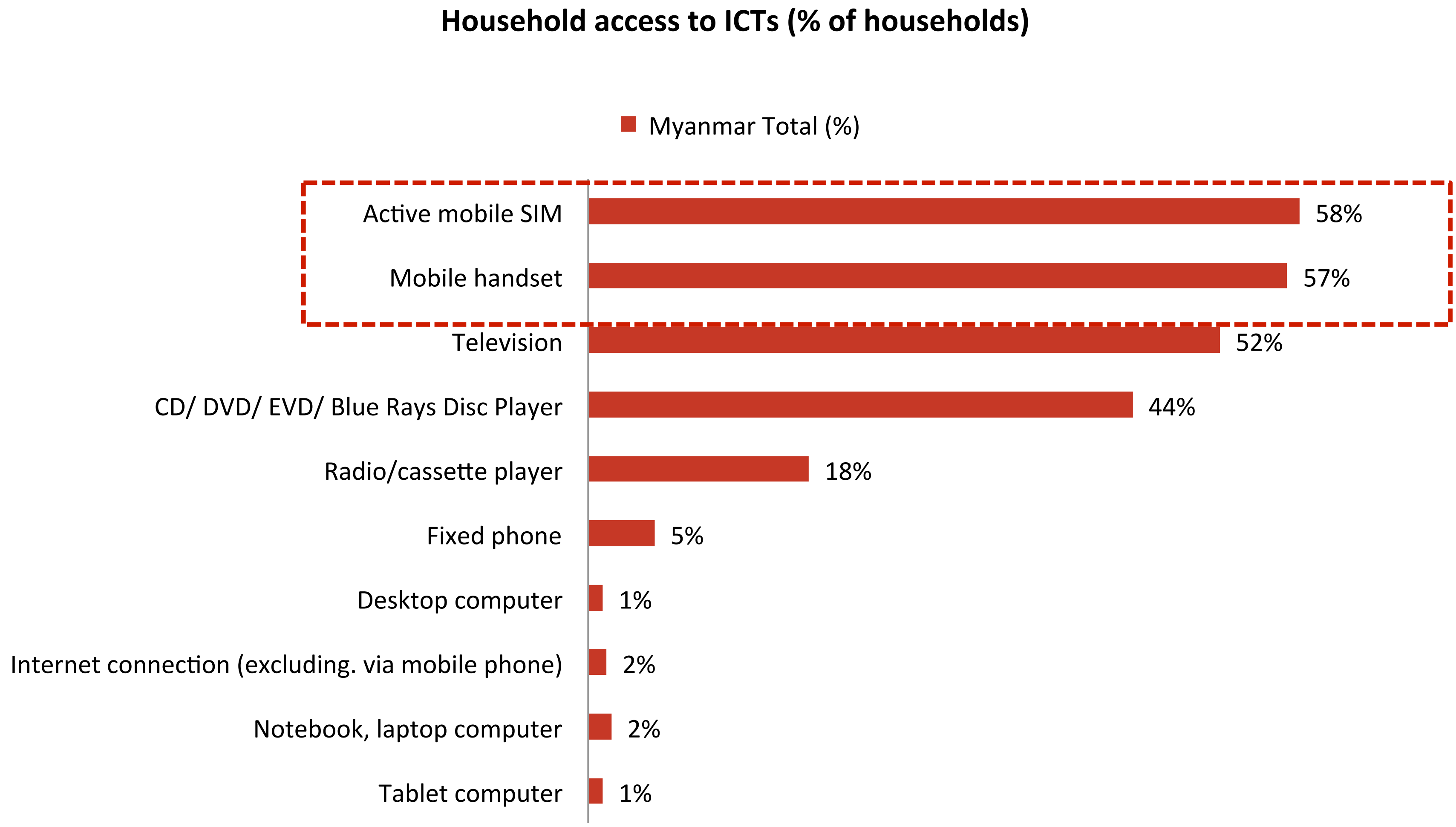
Number of handsets among household members (% of households)



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?

Base: All households

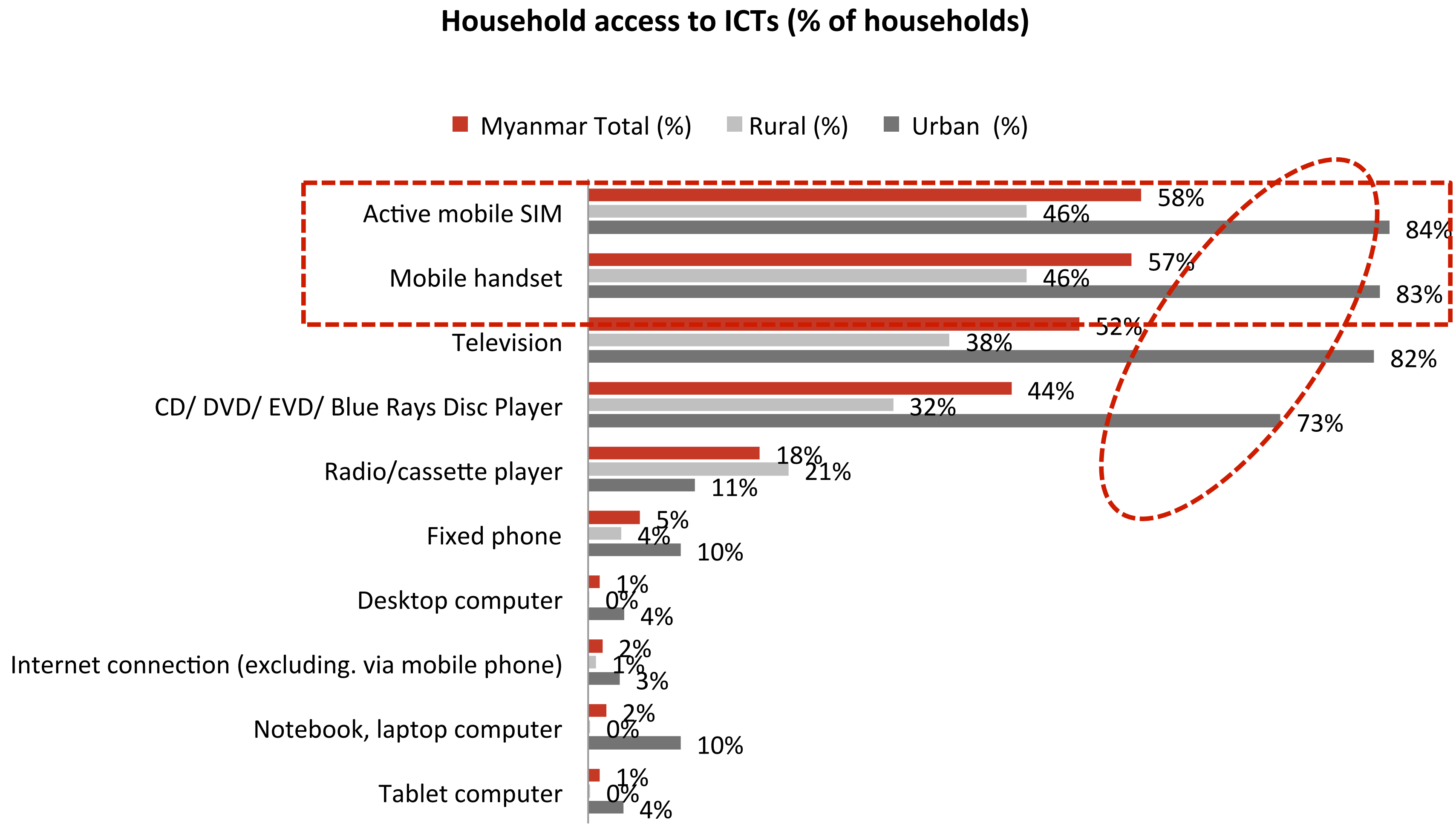
Mobile phones & SIMs are the most common of ICTs. Already ahead of TVs



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

Base: All households

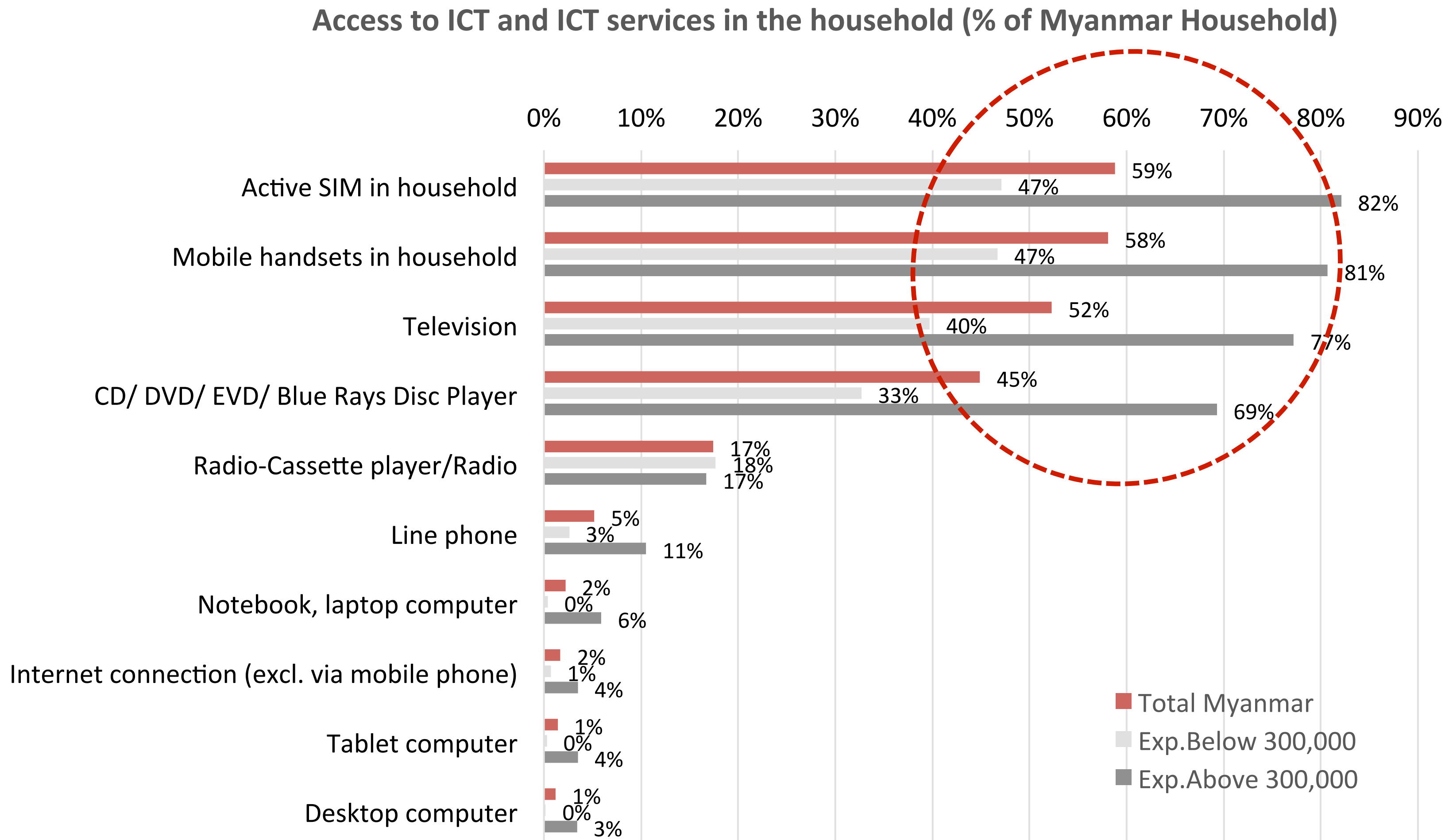
….but big urban-rural gap in phone, SIM, TV and CD/ DVD ownership



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

Base: All households

Gap between rich and poor households significant for mobile & fixed phones, televisions, CD/DVD players, and computers



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

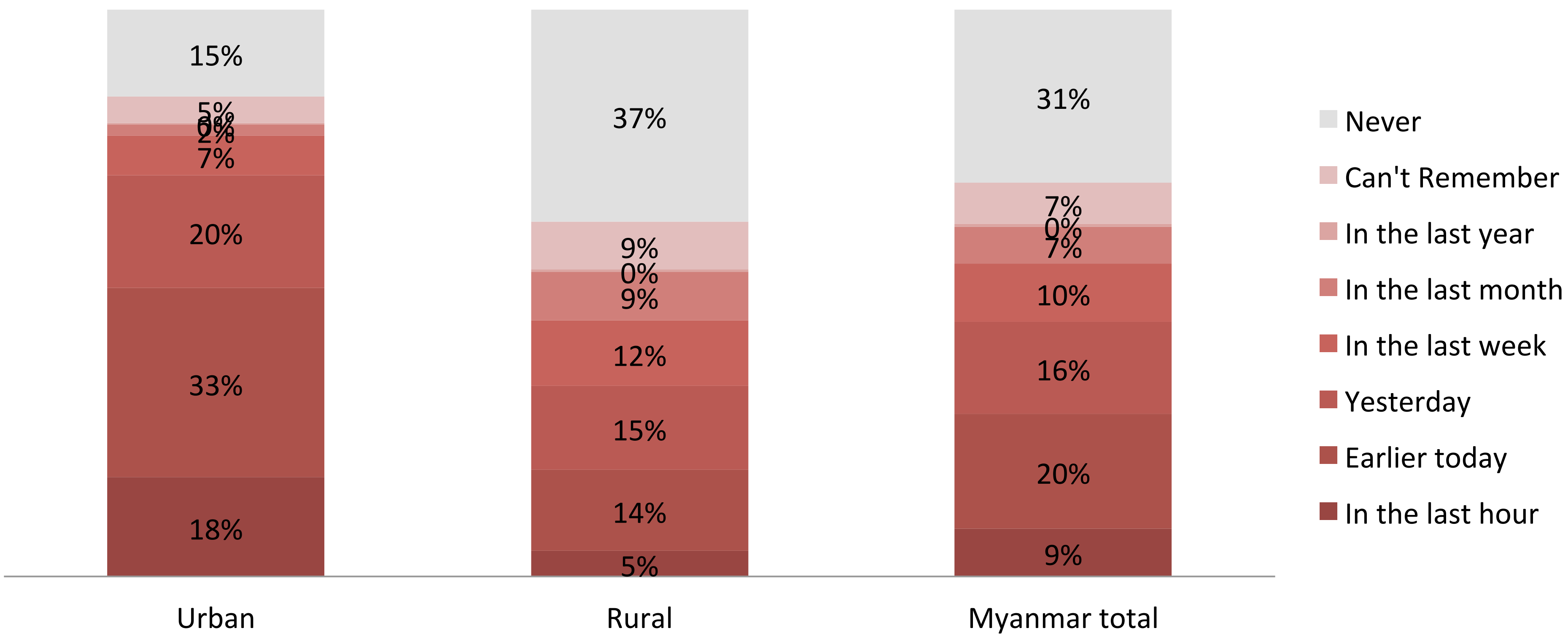
Base: All households

Baseline survey findings

MOST RECENT PHONE USE

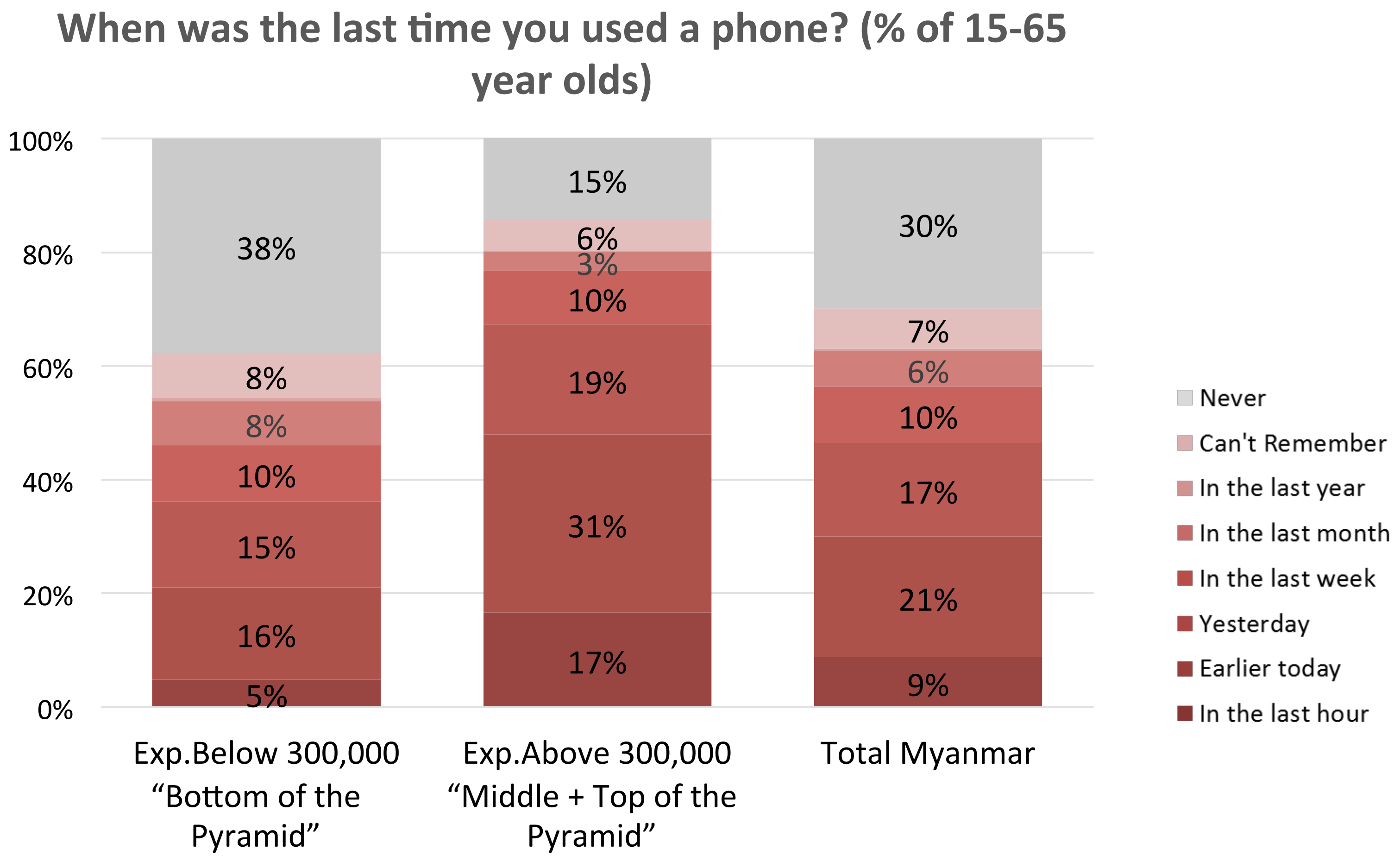
69% of 15-65 year olds in MM have used a phone before (teleusers); urban teleusers had more recent use than rural

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



Base: All respondents

Twice as many at the BOP had never used a phone, compared to the rest



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

46% of the BOP had used phone in last week; 44% in last month. Compared to Asian neighbors, 9-11 years after their liberalization….

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

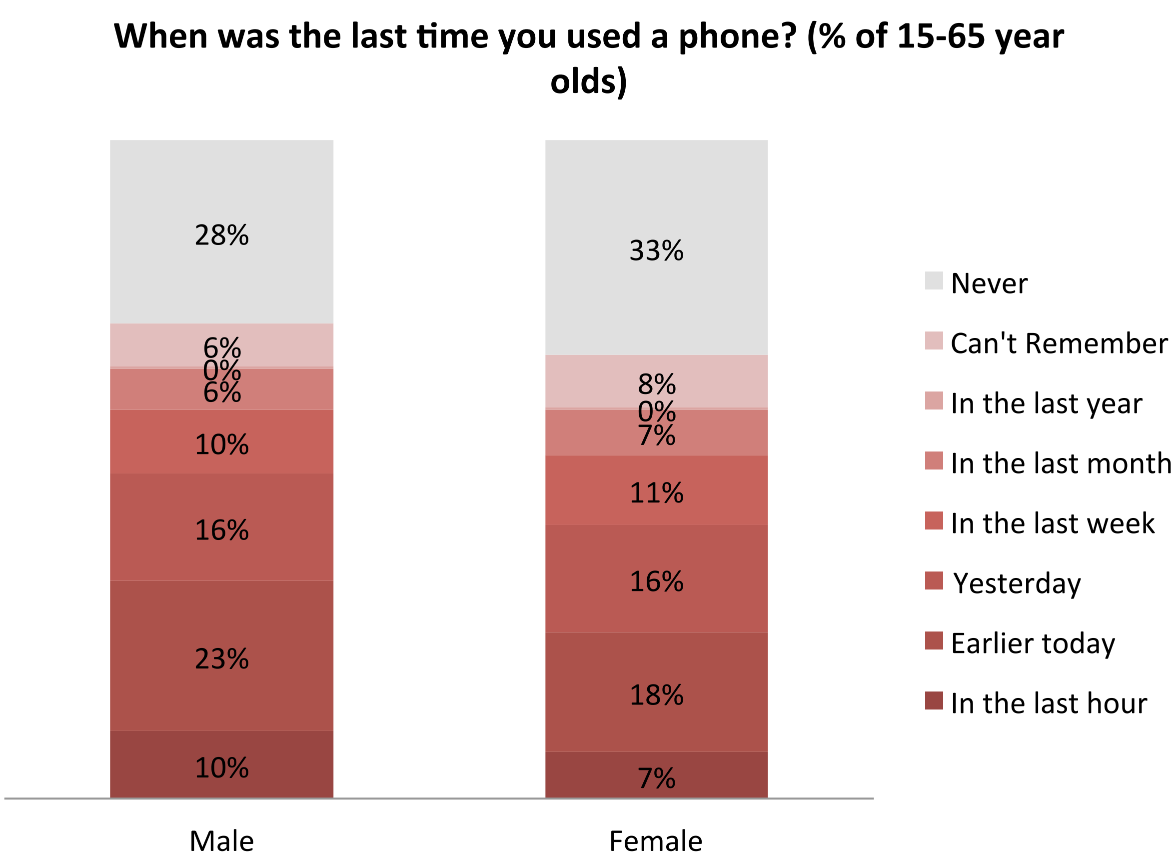
	South Asia			South East Asia	
	Pakistan	India	Sri Lanka	Philippines	Thailand
Used phone in last 3 months	98%	94%	92%	93%	95%

% 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.

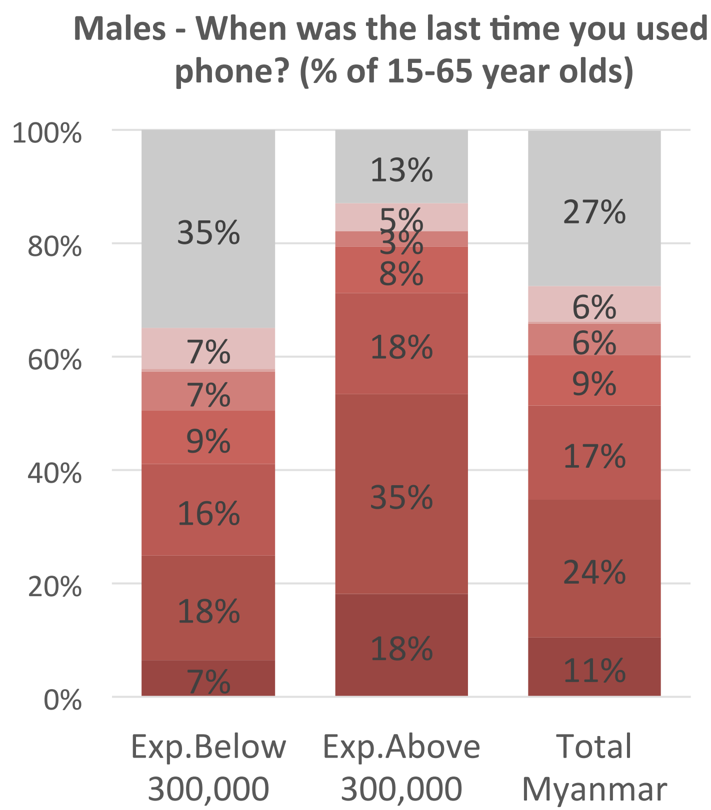
Gender difference is minimal: males are more frequent teleusers

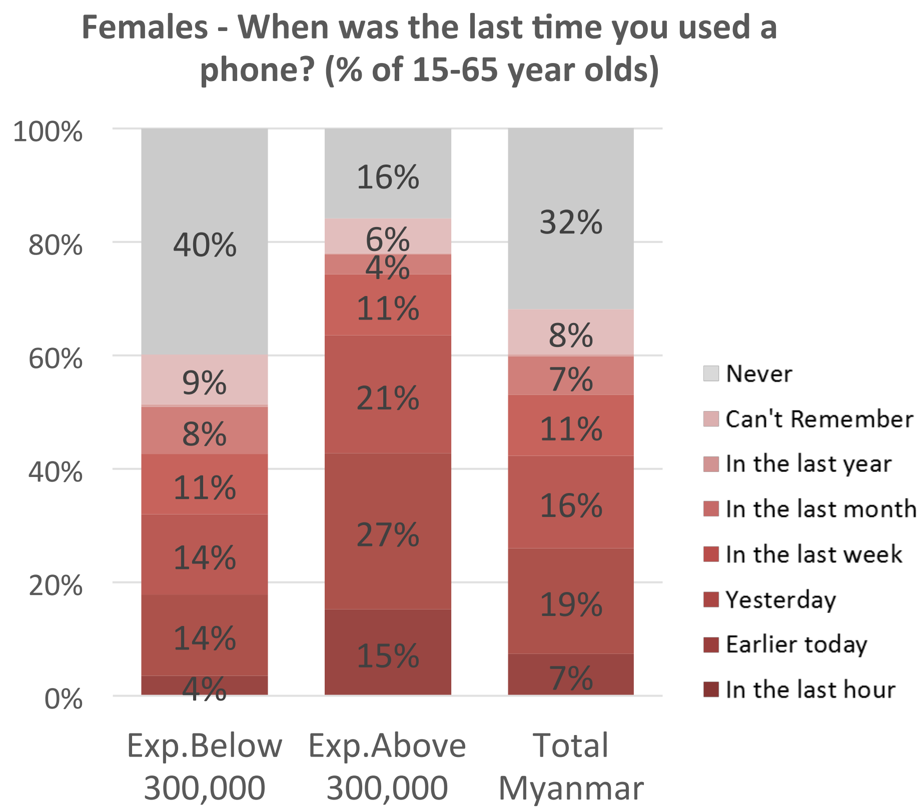


Q: When did you last use a phone to take or receive a call? It could be through your own phone, a neighbors' phone, a friend's phone, communication kiosk/shop or any other. It also need not be paid for?

Base: Respondents who had ever used a phone before

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

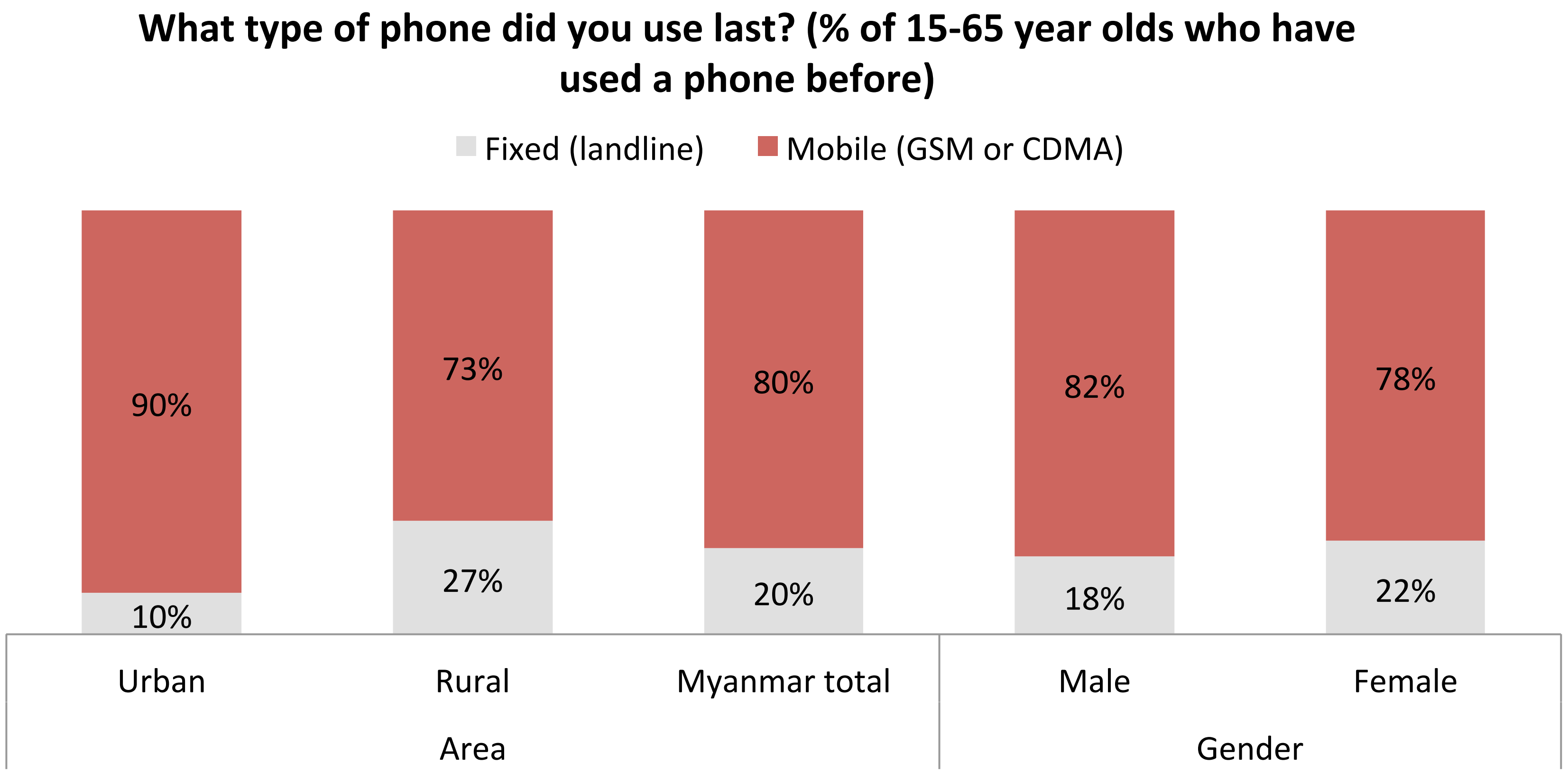




Base: All respondents

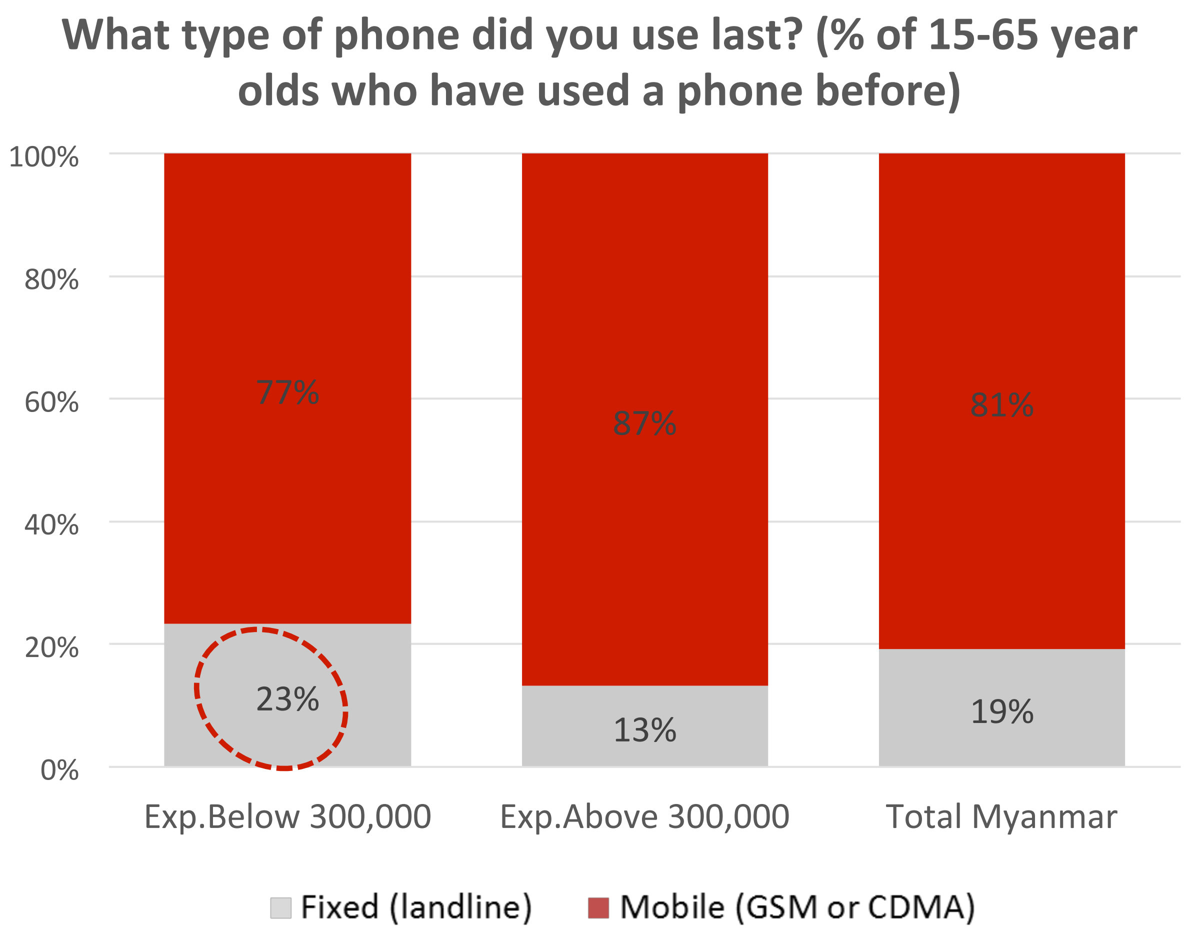
Q: When did you last use a phone to take or receive a call? It could be through your own phone, a neighbor's phone, a friend's phone, communication kiosk/shop or any other. It also need not be paid for?

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



Base: Respondents who had ever used a phone before

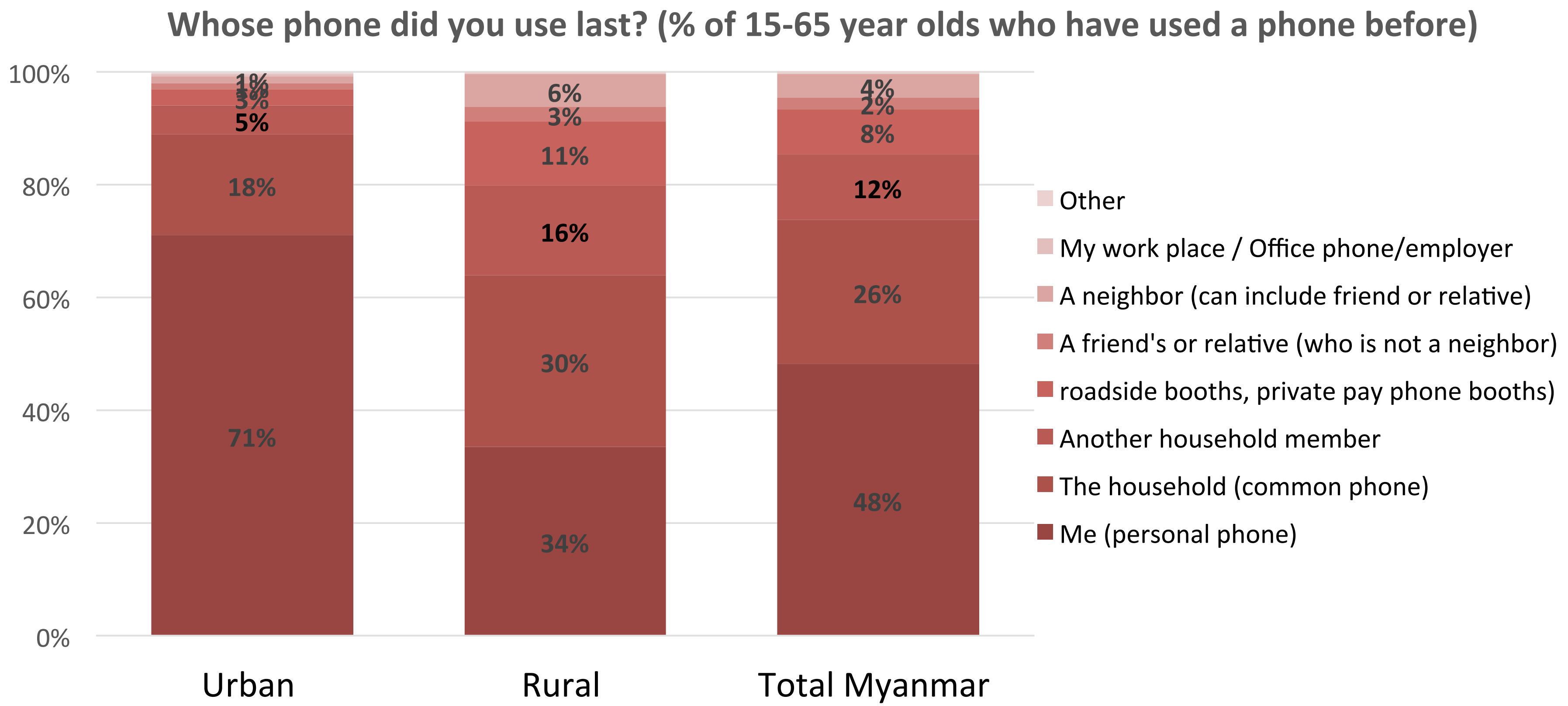
Dependence on fixed higher among poor households (who have fewer mobile phones)



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

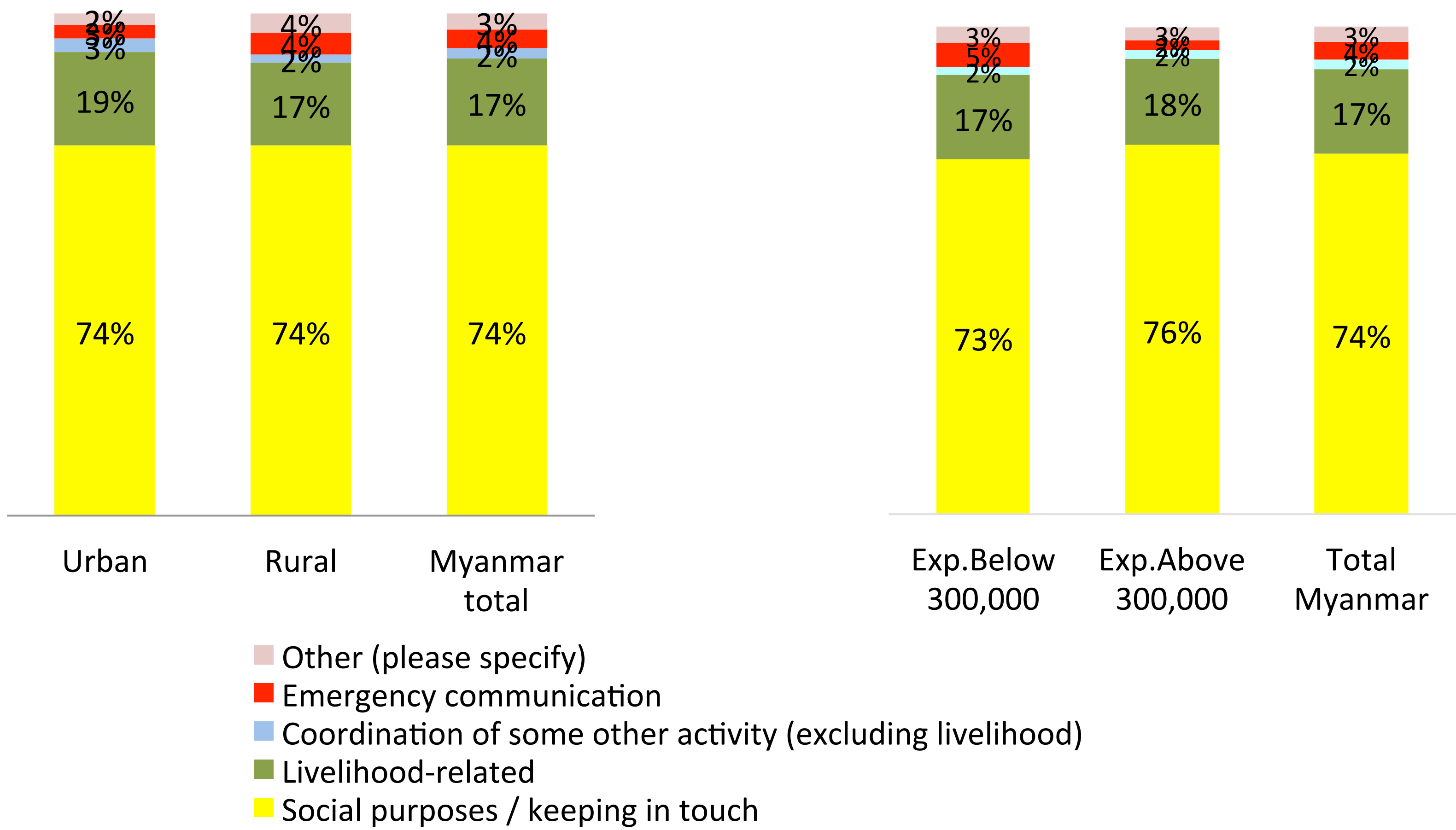


Q: What type of phone did you make or receive your last phone call from?

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.

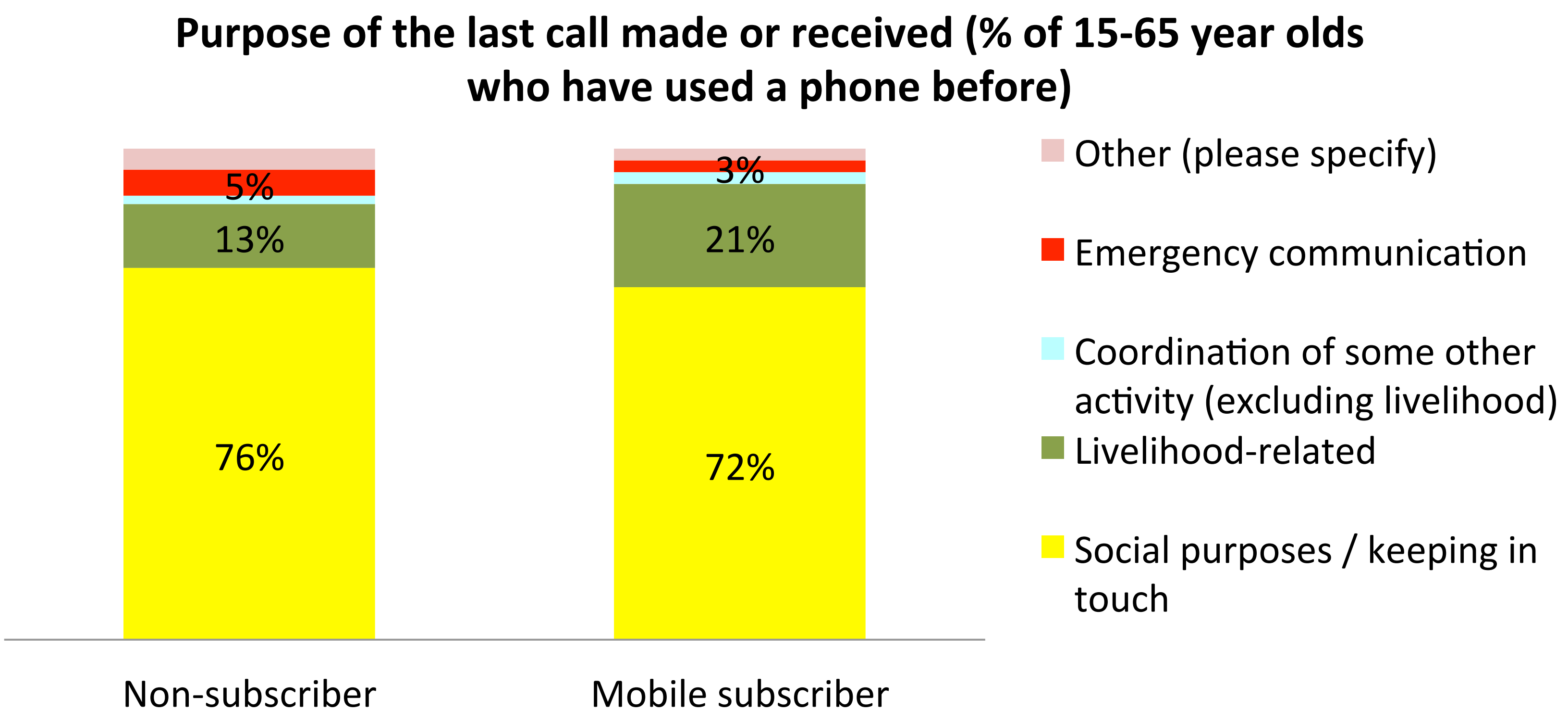
Purpose of the last call made or received (% of 15-65 year olds who have used a phone before)



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

Base: Respondents who had ever used a phone before

Subscribers (phone + SIM owners) more likely to have made livelihood related calls. Non-subscribers show slightly higher emergency use



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

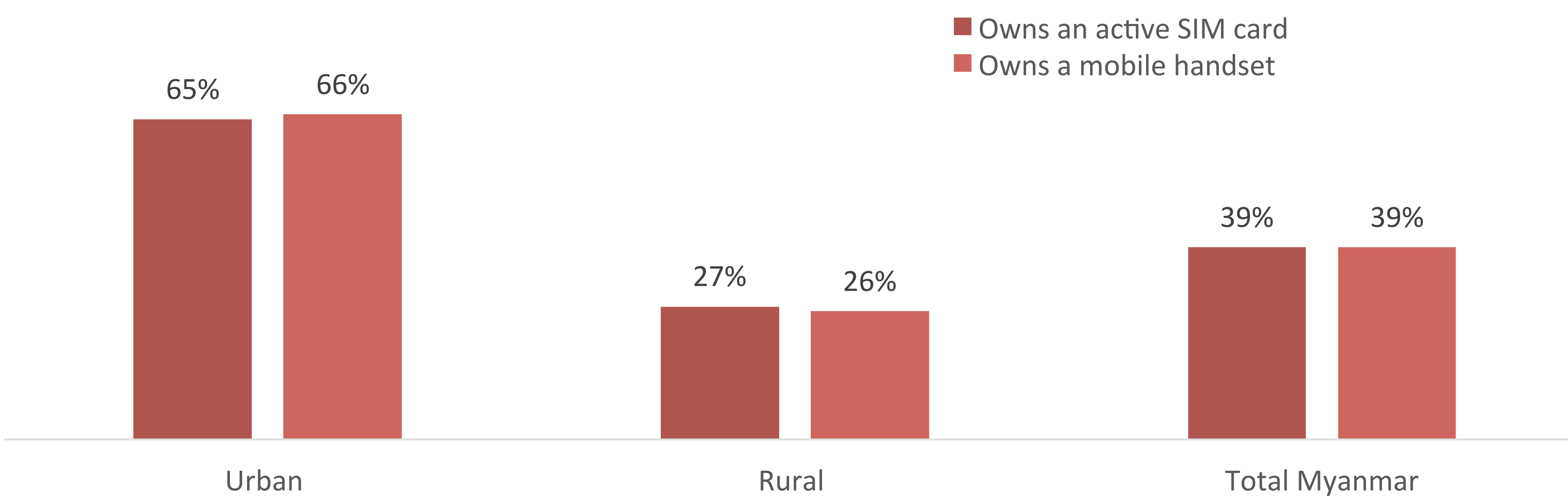
Base: Respondents who had ever used a phone before

Baseline survey findings

MOBILE SUBSCRIBERS: OWNERSHIP AND USAGE

39% Myanmar 15-65 population are mobile subscribers

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

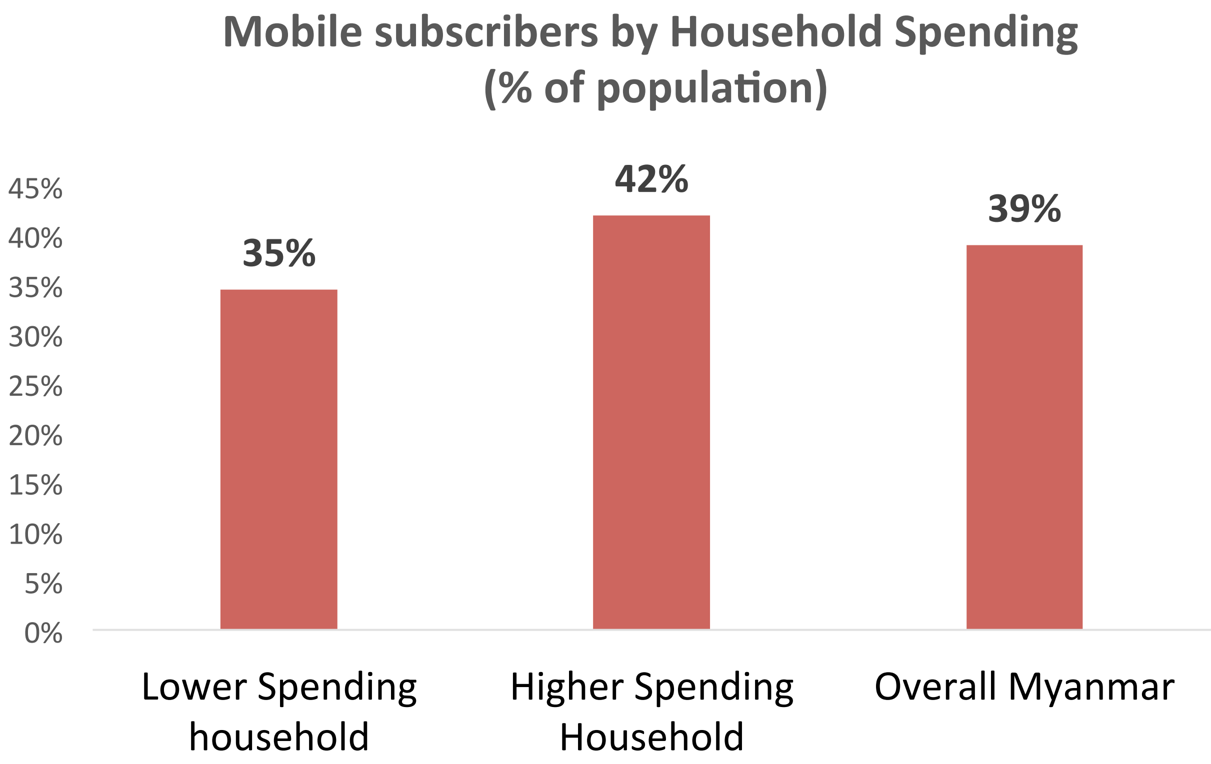


- City-wise SIM penetration:
  - Yangon-83%; Mandalay-55%; Nay Pyi Taw-55%

Q:Which describes your status of mobile phone ownership?

Base: All respondents

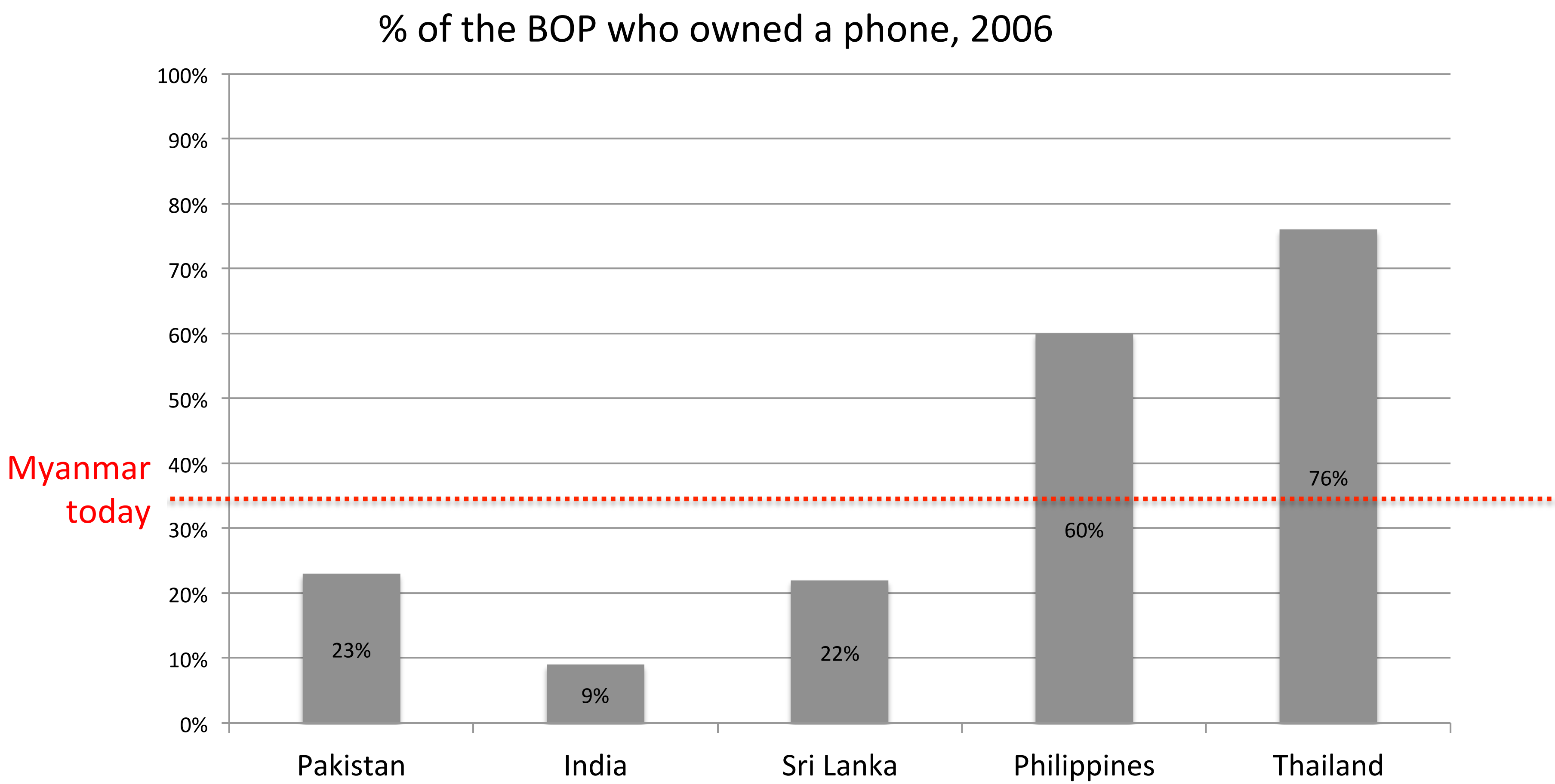
More mobile subscribers are in higher spending households.



Q:Which describes your status of mobile phone ownership?

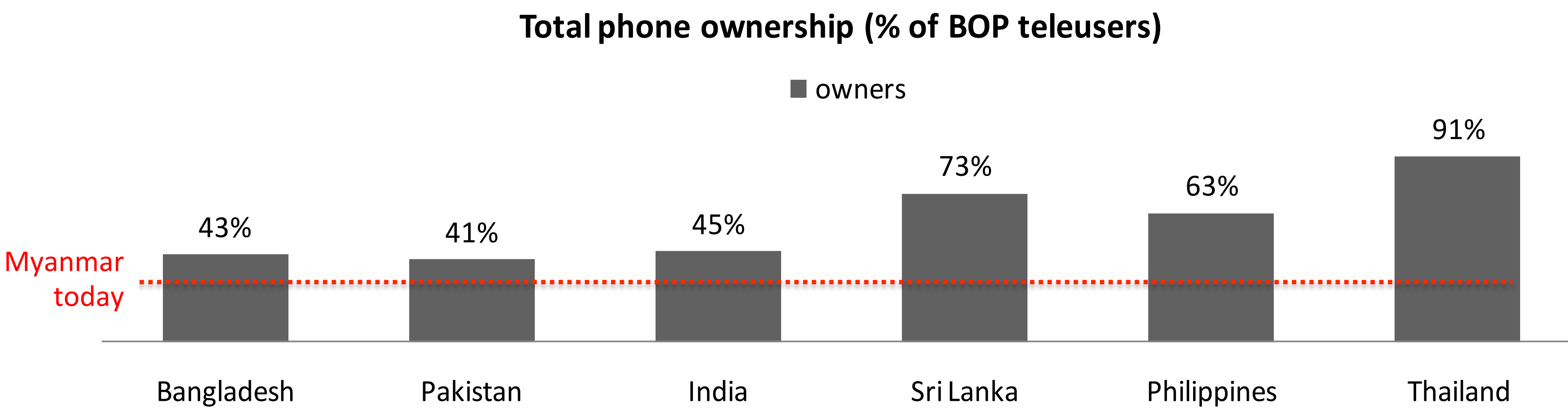
Base: All respondents

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

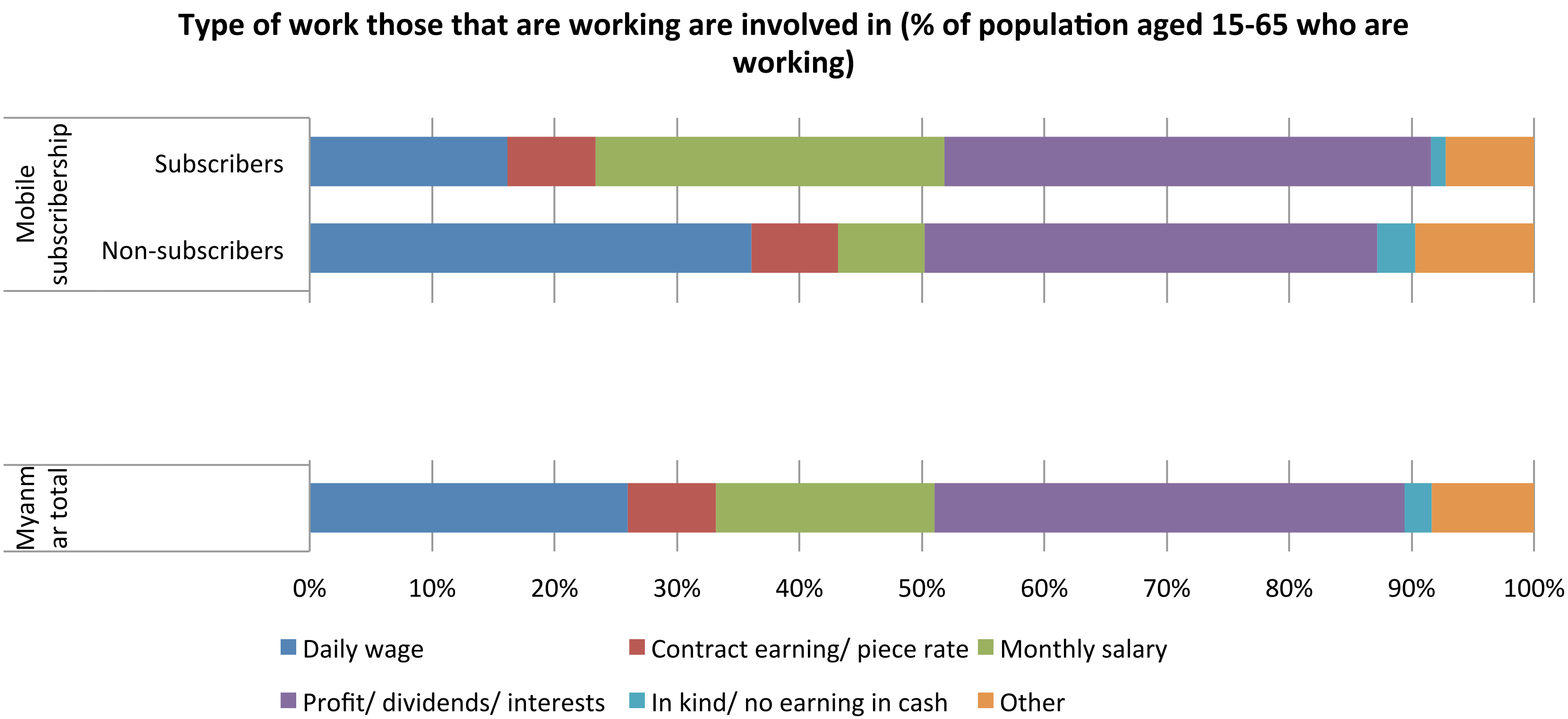


Base: % of rents

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

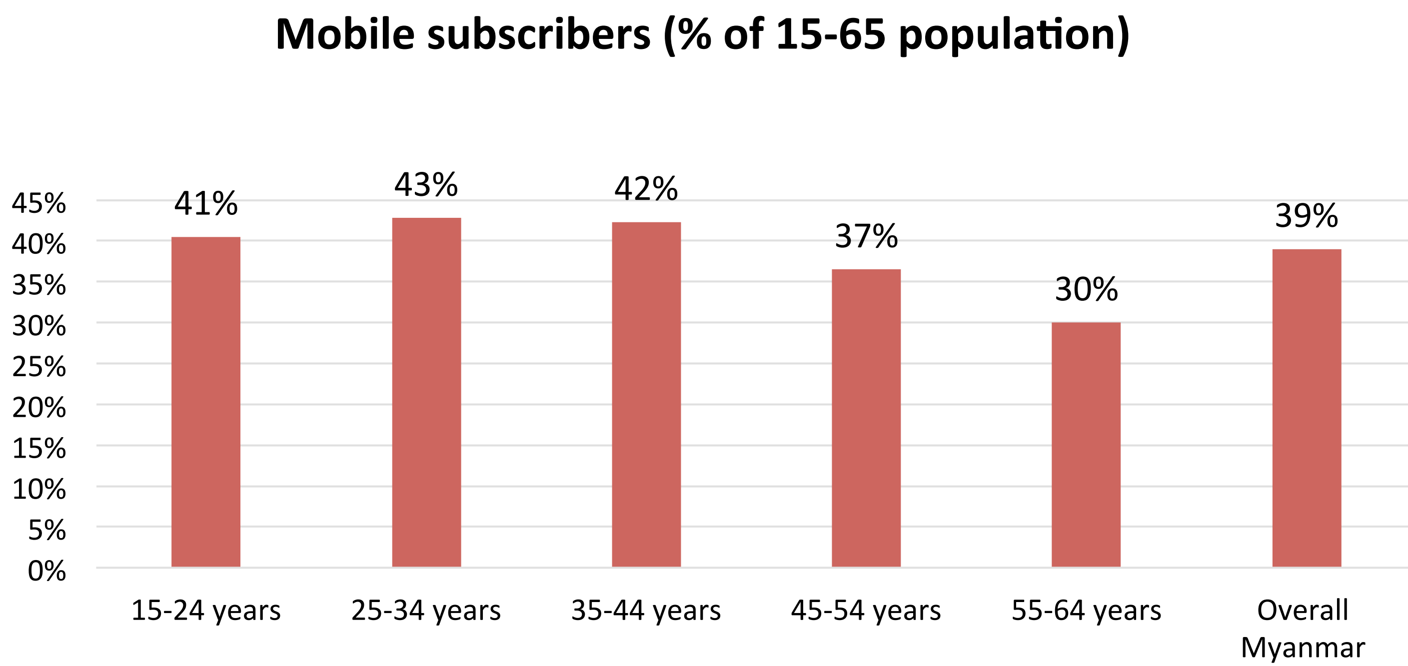


Subscribers mostly on monthly salary or living on profit/dividend-making income



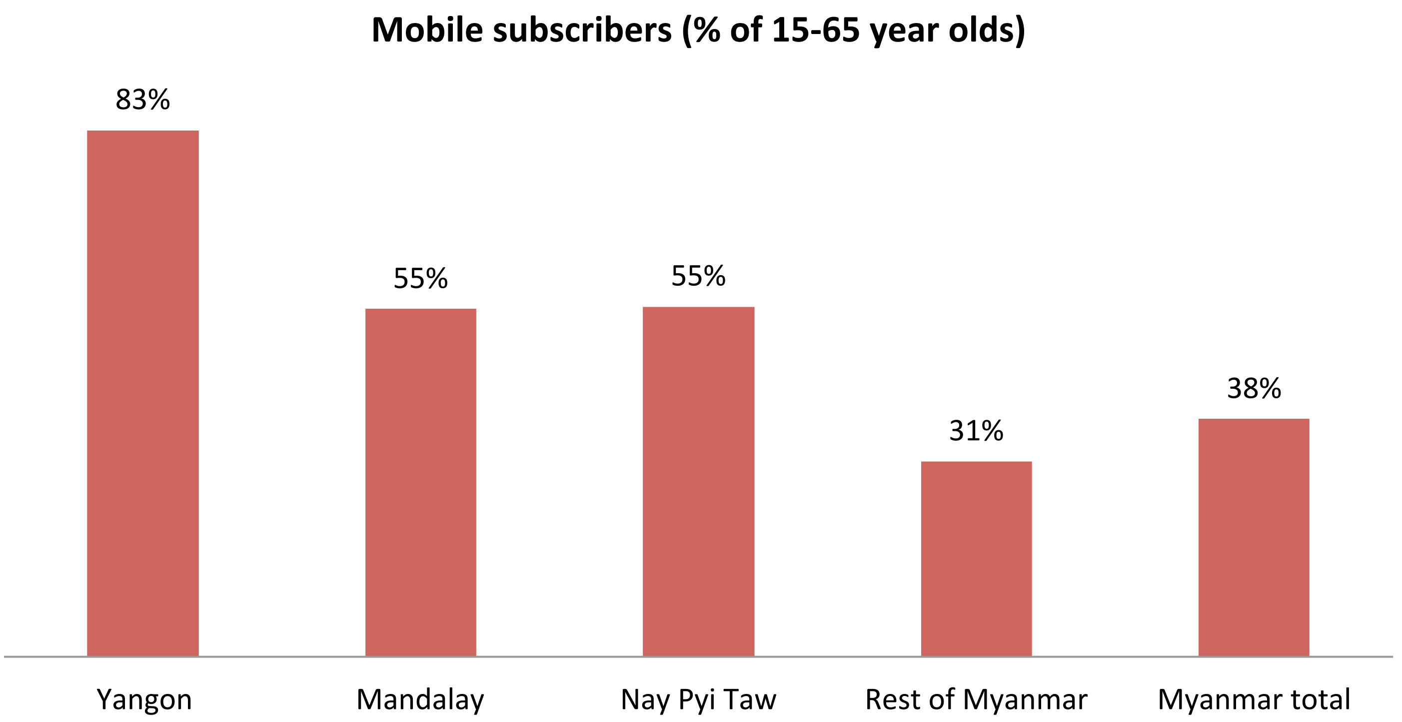
Base: All aged 15-65 individuals who are working

Penetration highest among 15-44 year olds.



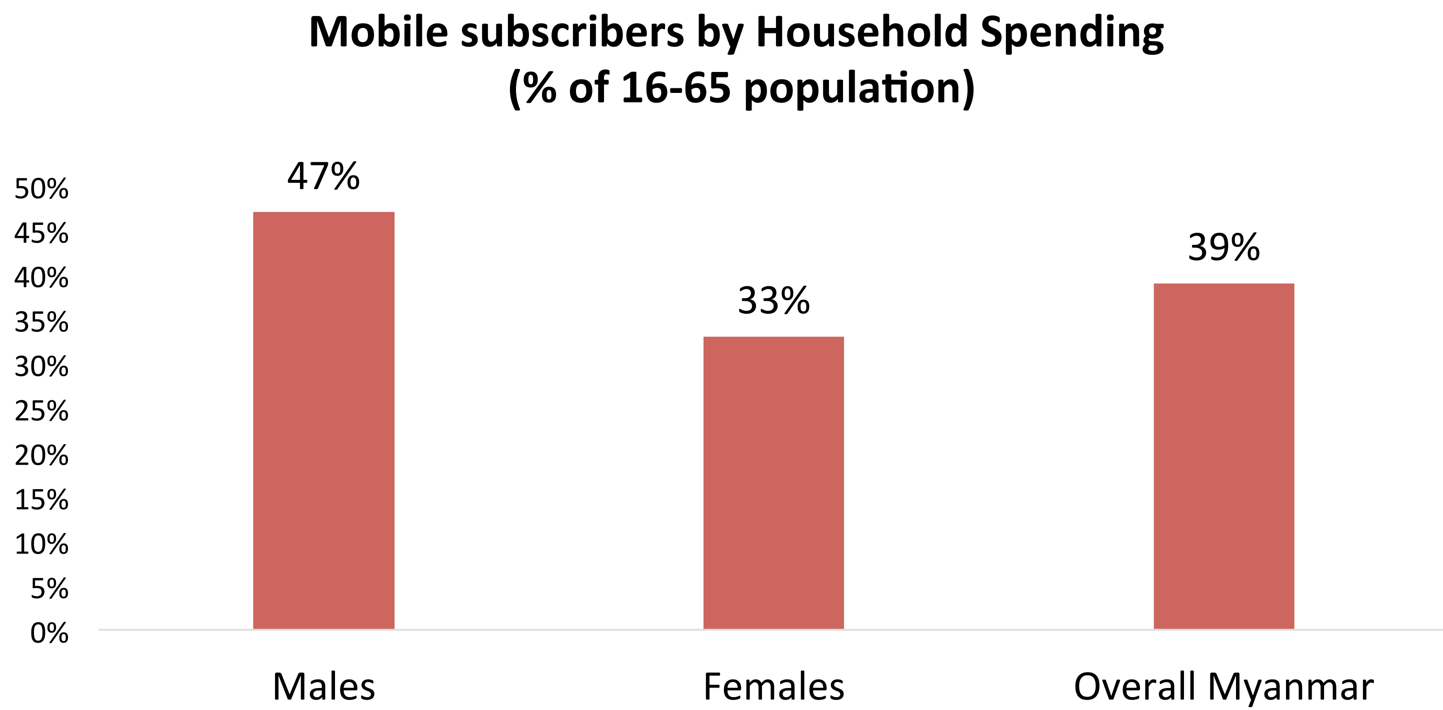
Base: All respondents

Adoption thus far highest in big cities



Base: All respondents

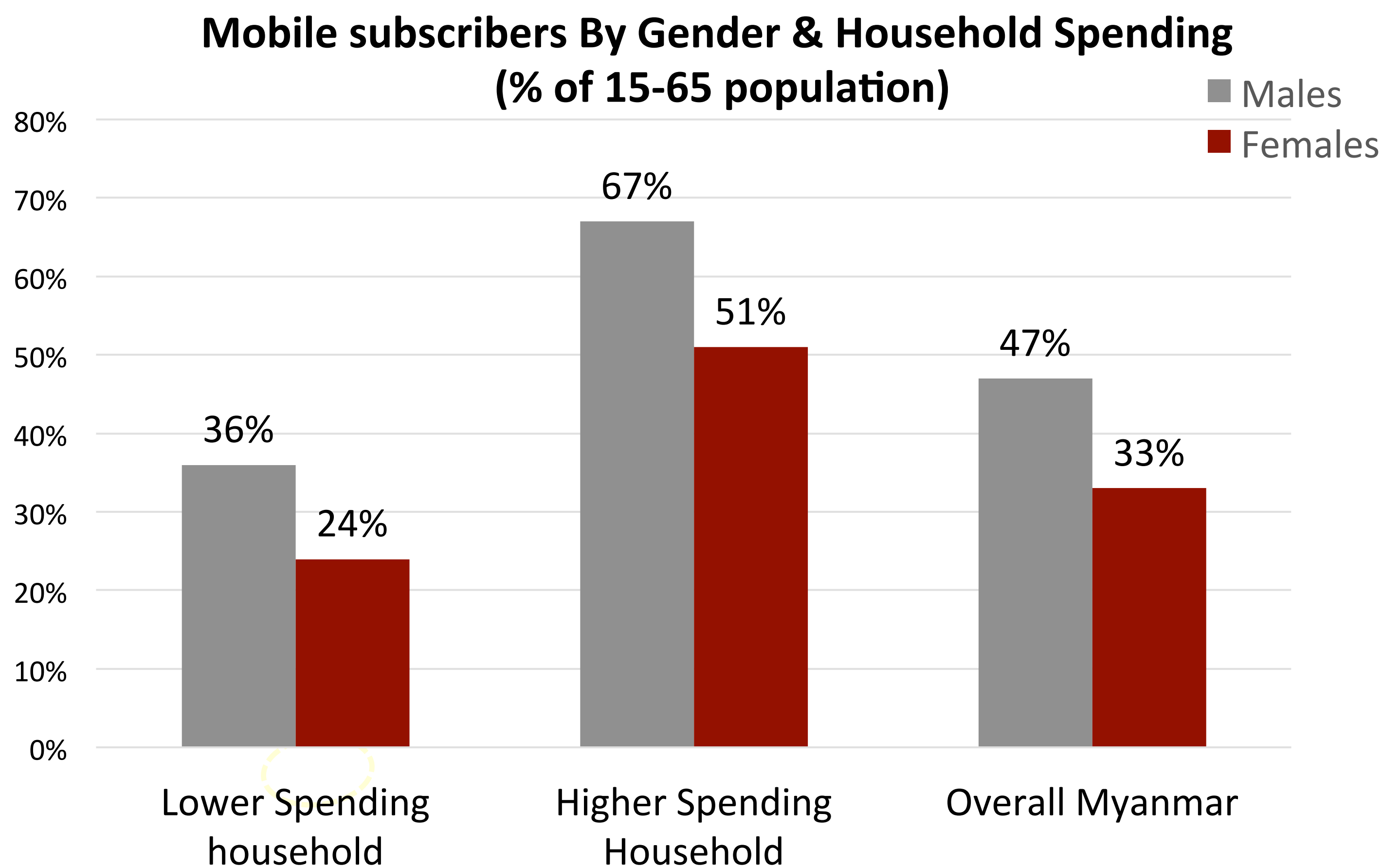
Gender gap in phone ownership higher than in use



Q:Which describes your status of mobile phone ownership?

Base: All respondents

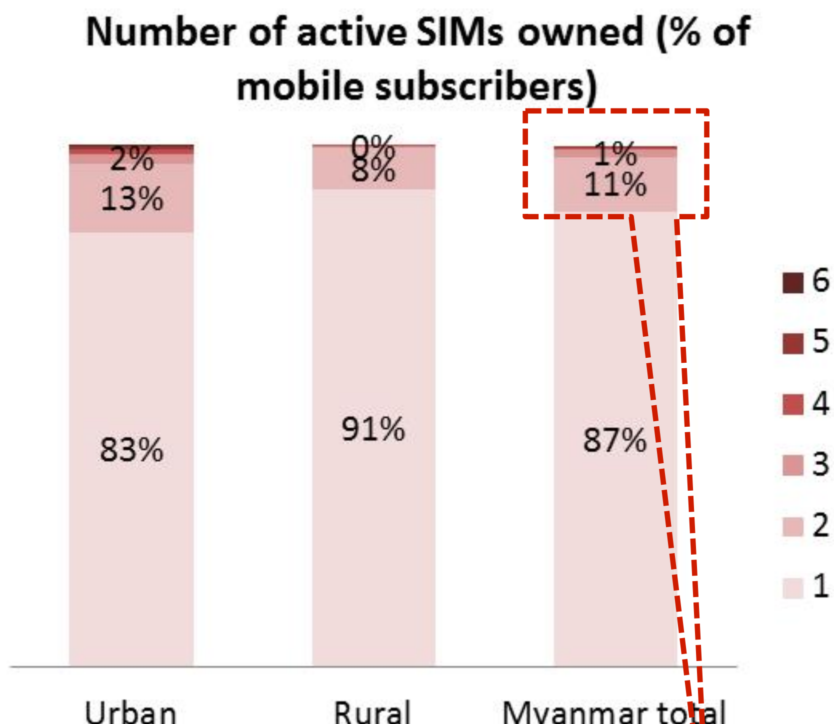
Gender gap in mobile ownership exists in high and low-spending households. Beyond just income…



Q:Which describes your status of mobile phone ownership?

Base: All respondents

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

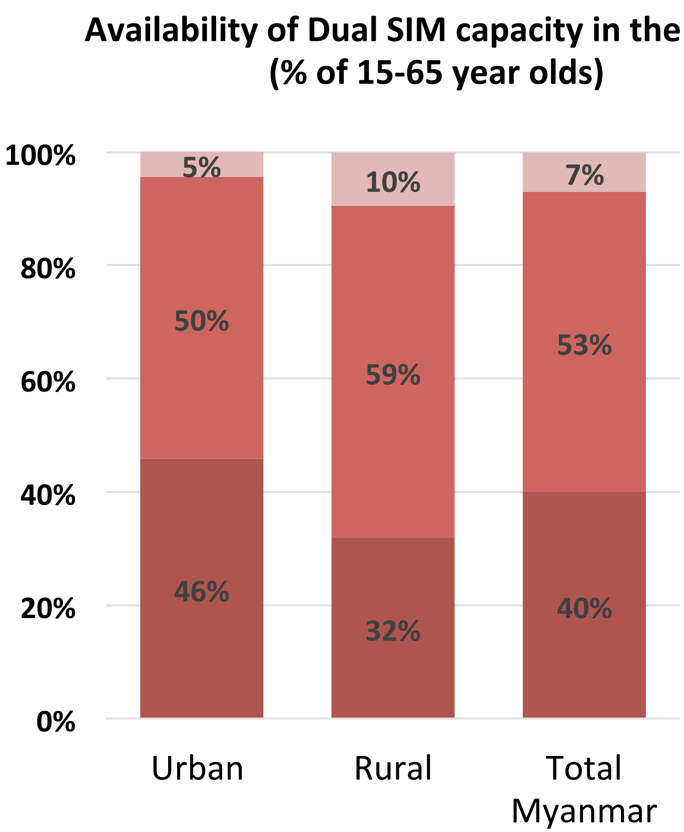


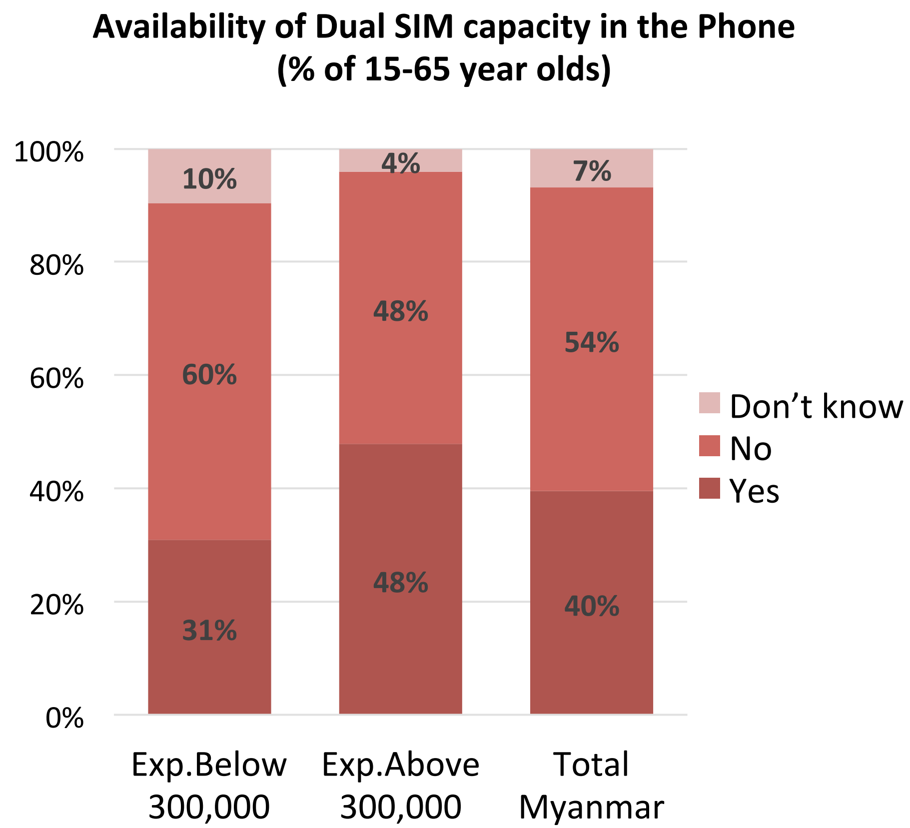
	Urban	Rural	Myanmar total
More than 1 SIM	17%	8%	13%

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

Relatively high availability of dual-SIM phones. Multi-SIM use may increase even more

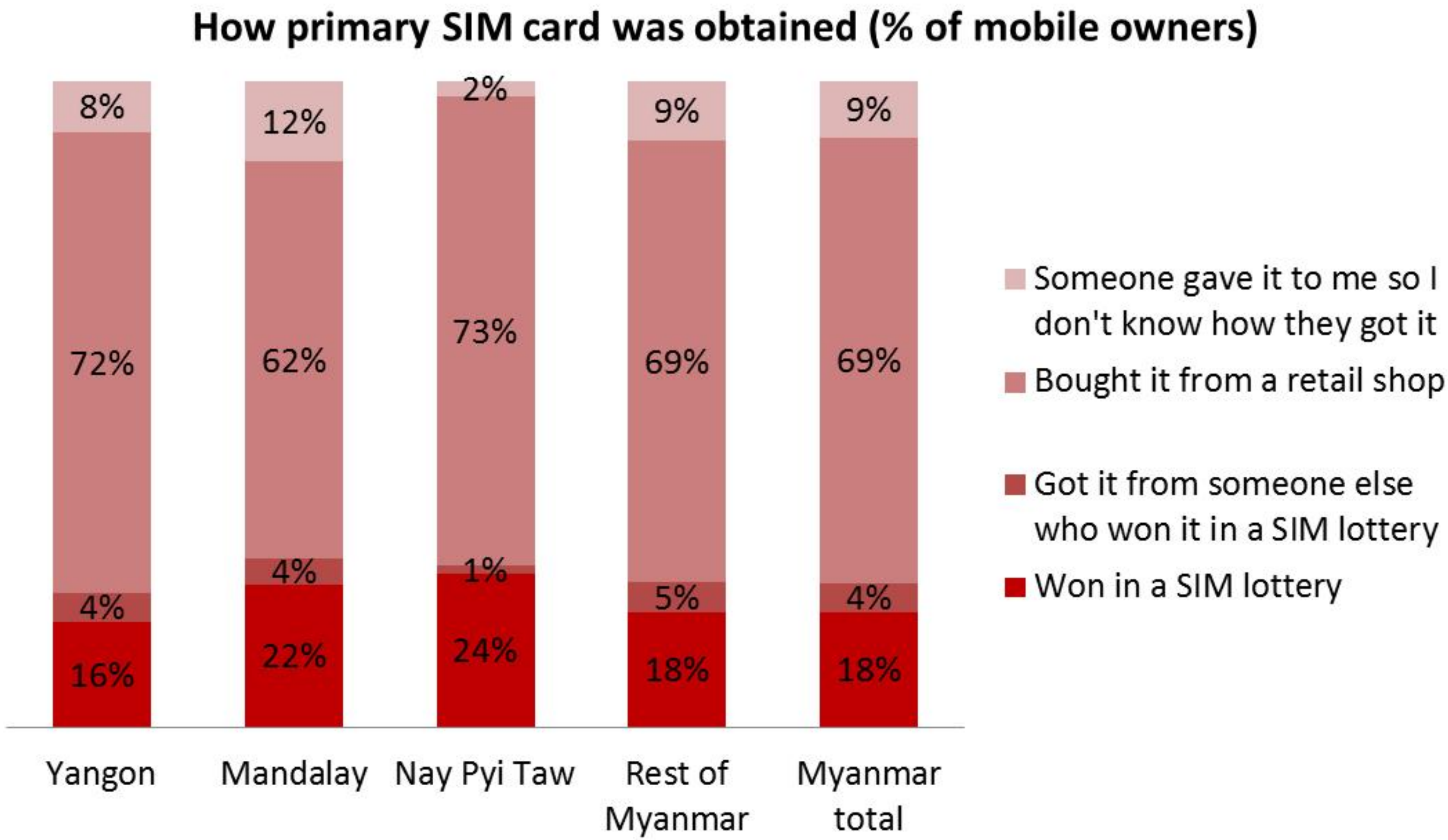




Q:What are the features your phone has ? Dual SIM capacity ?

Base: Mobile phone subscribers

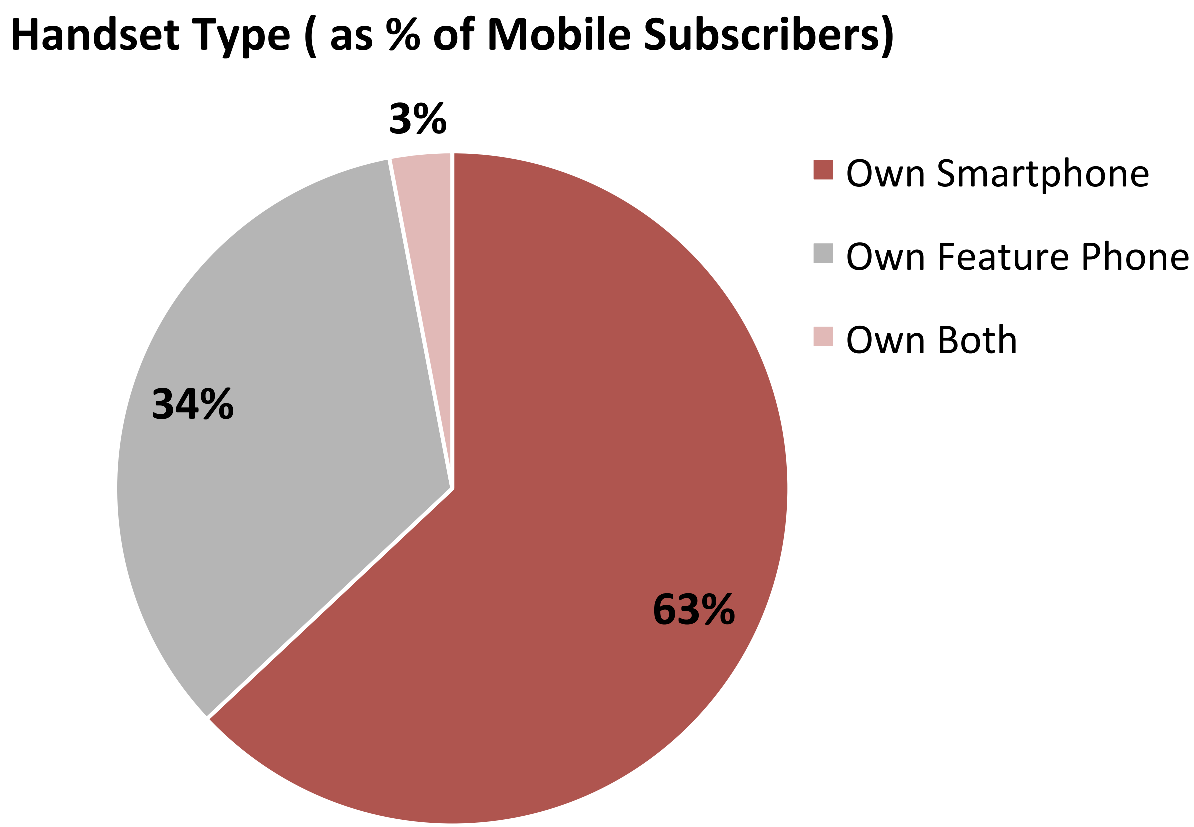
18% of subscribers' primary connection obtained via lottery. Majority purchased



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

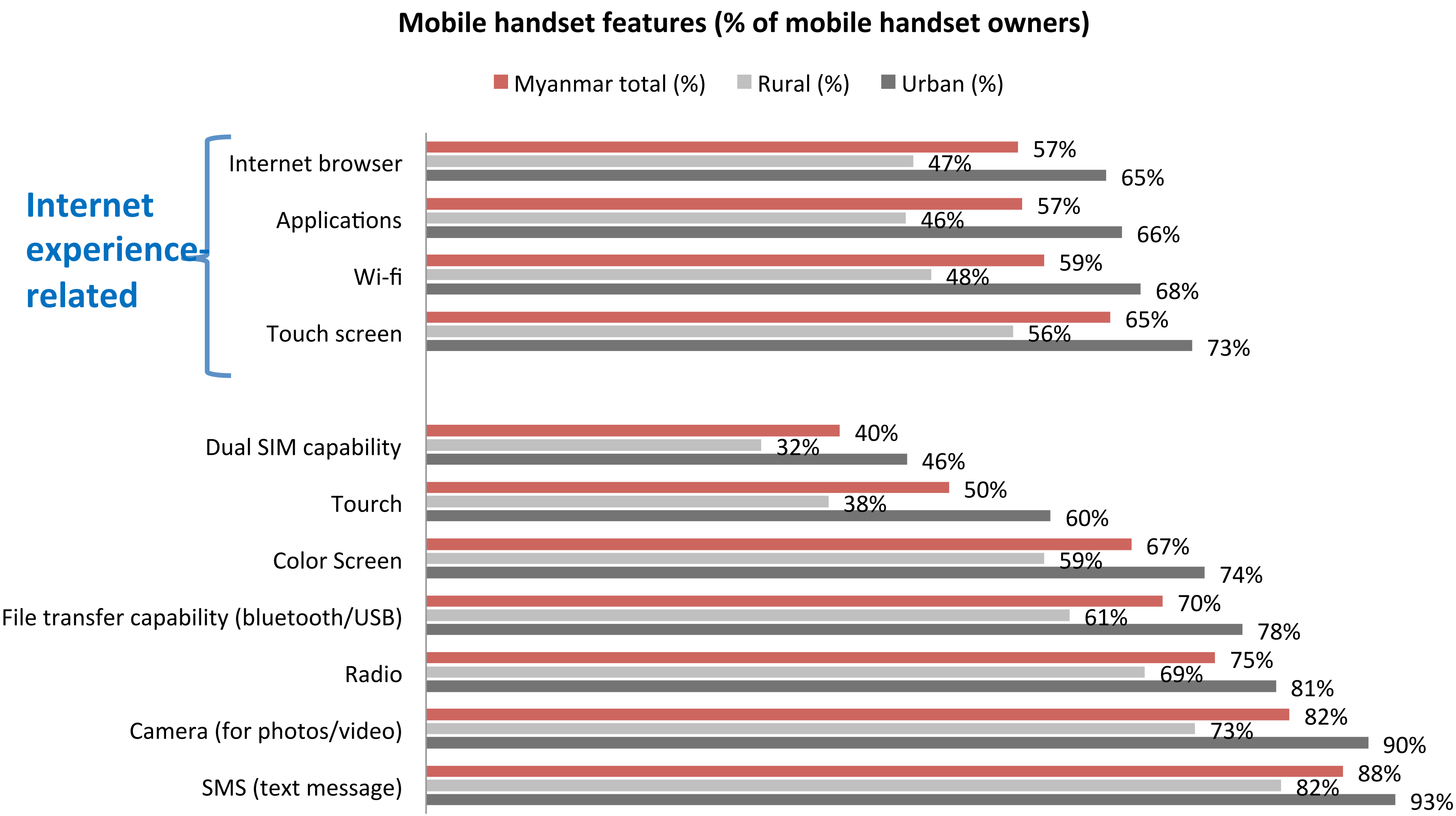
Base: Mobile phone subscribers

Smartphones dominate: 63% all subscribers have one



Base: Mobile phone subscribers

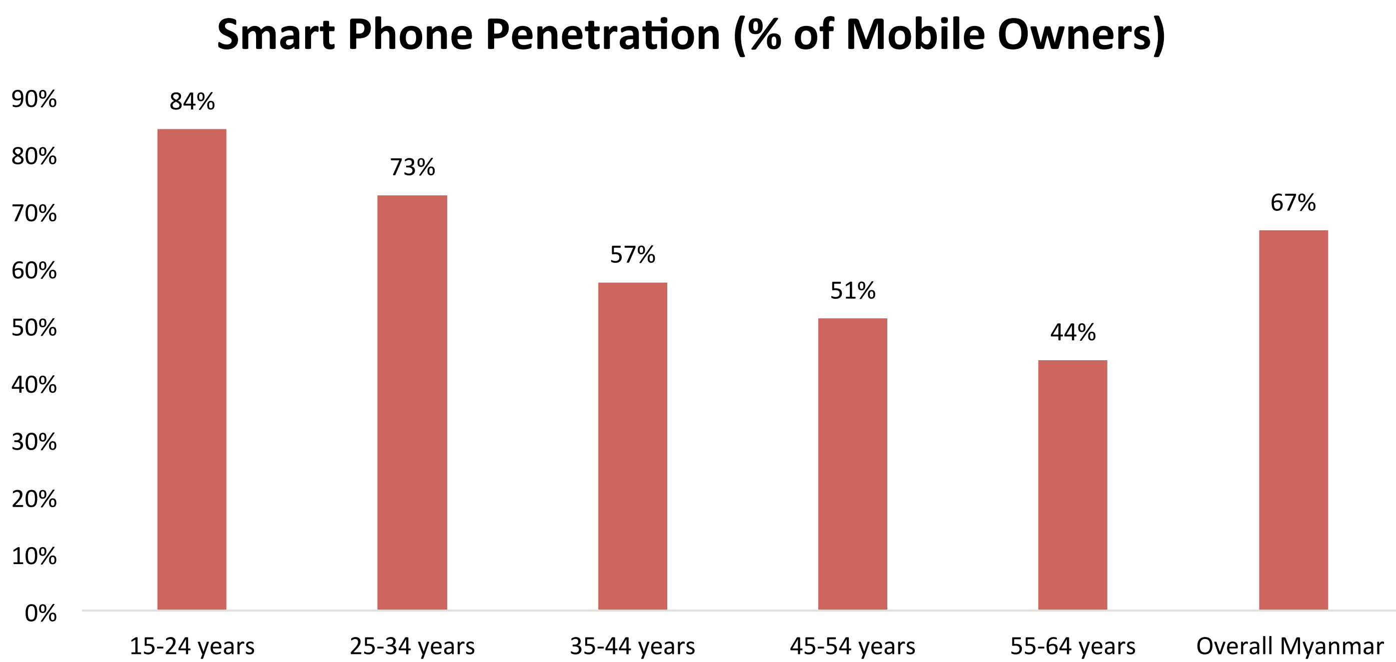
…with Internet-ready features



Q:What are the features your phone has?

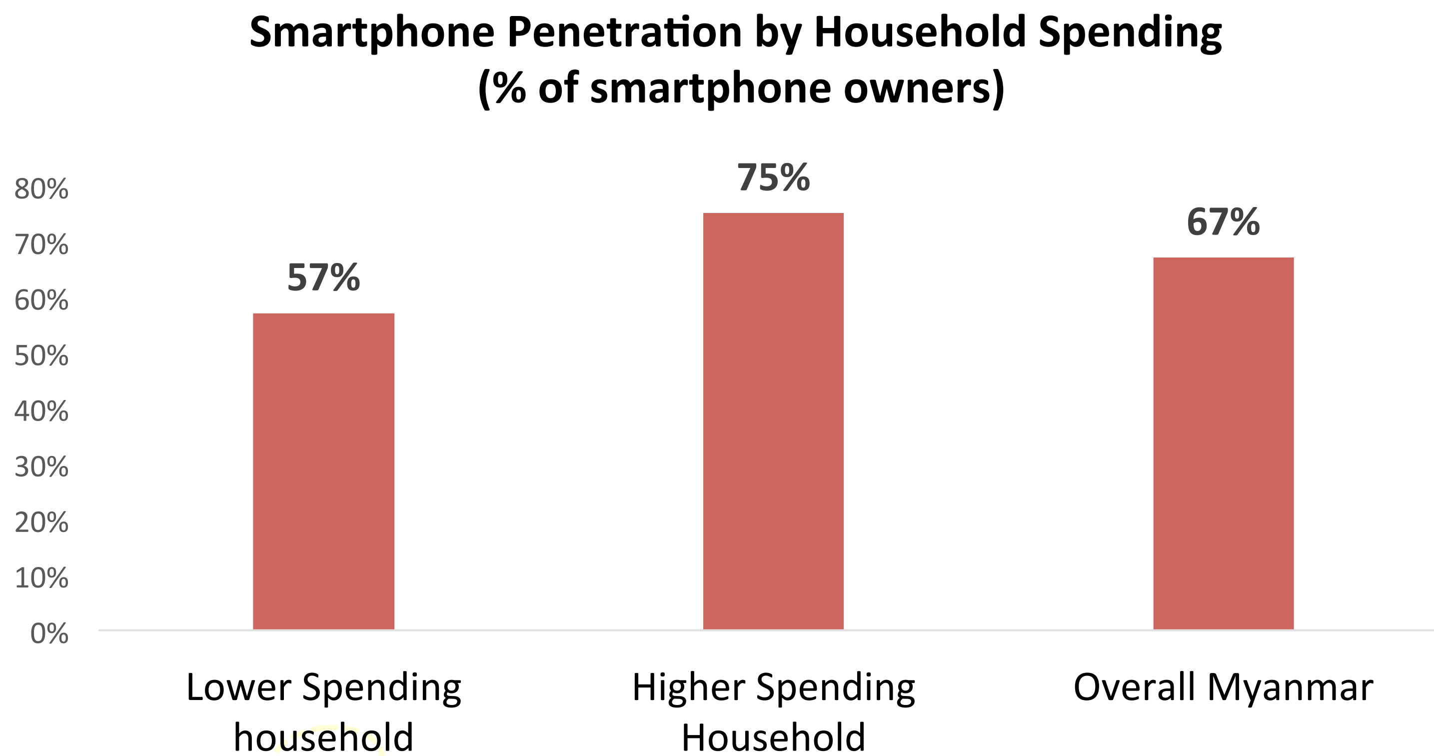
Base: Those who own a mobile handset

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



Base: All Mobile Owners

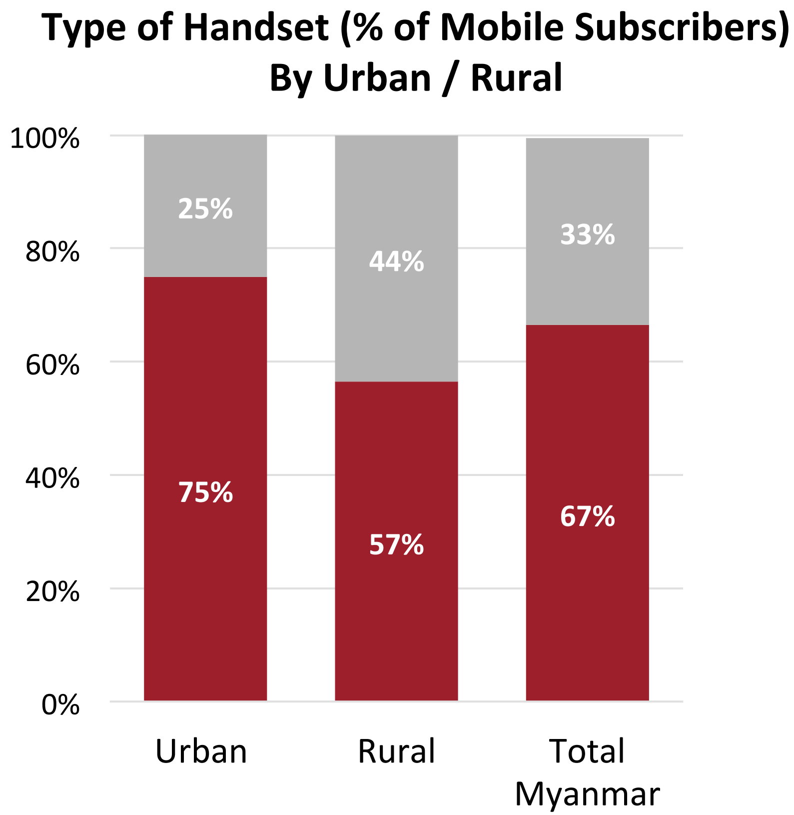
No surprise: Smartphone ownership higher among the rich

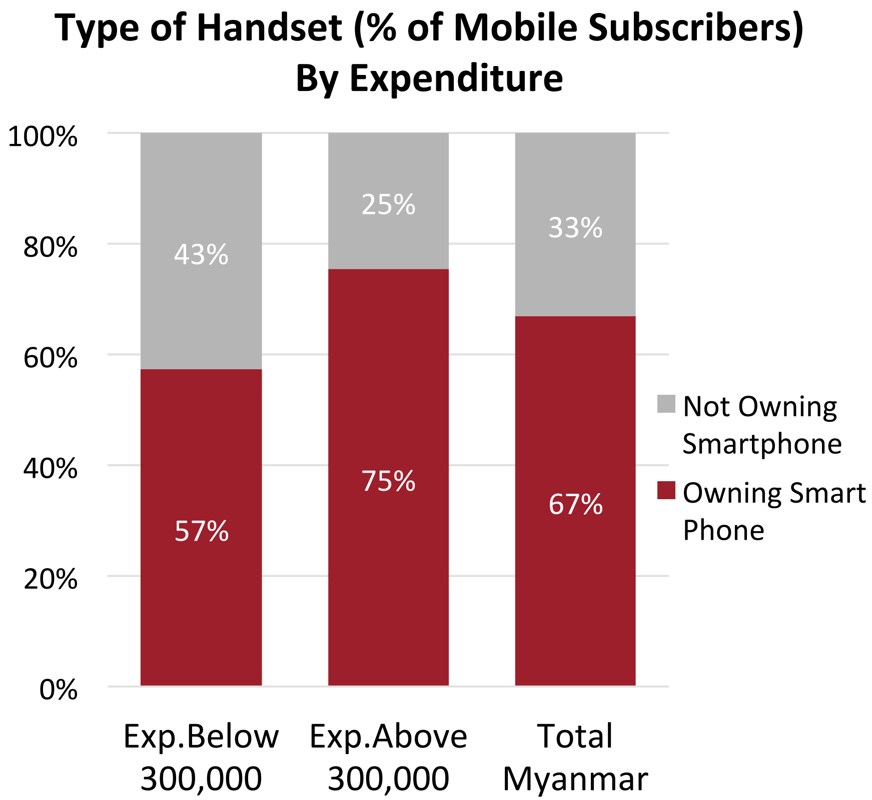


Q:Which describes your status of mobile phone ownership?

Base: All Mobile Owners

Smartphones mostly in the hands of urban, high-spending households

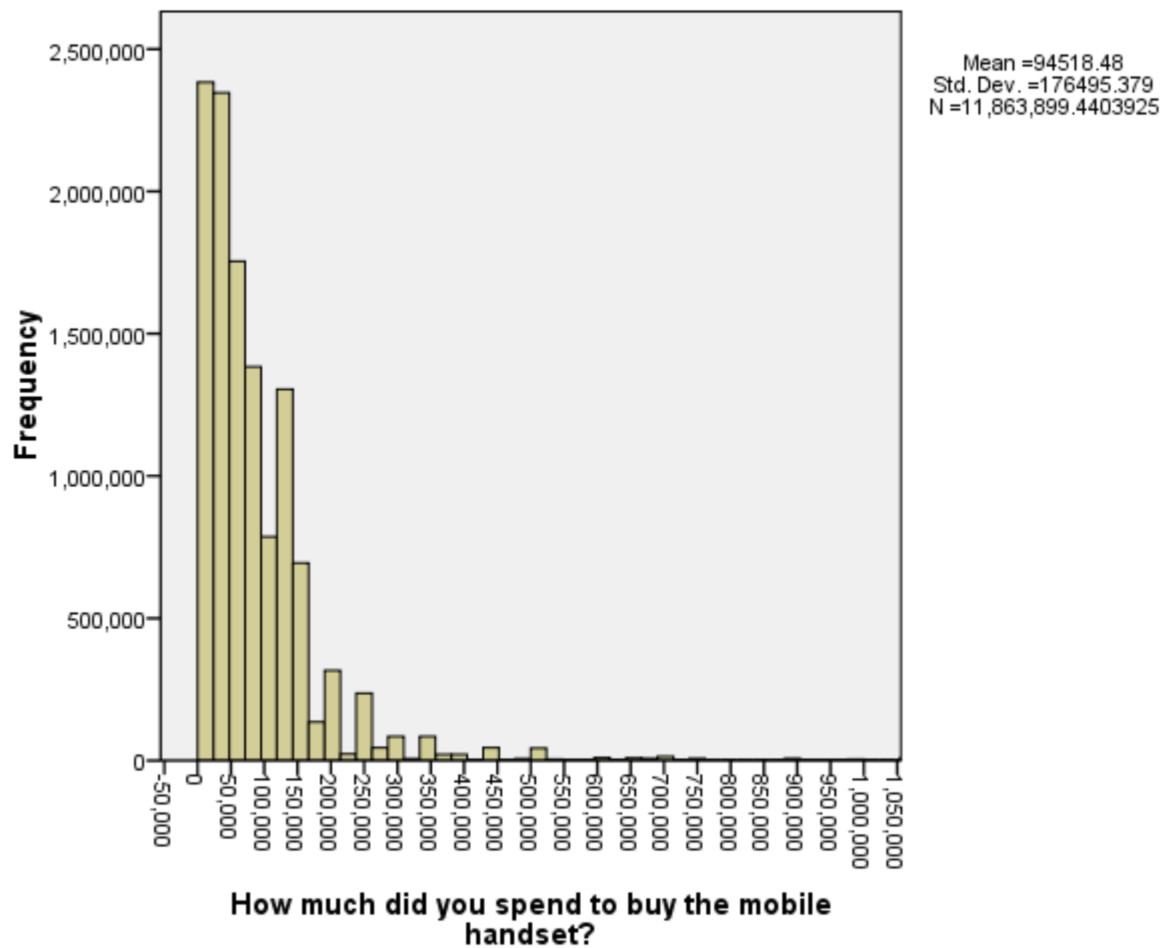




Q:What is the type your phone?

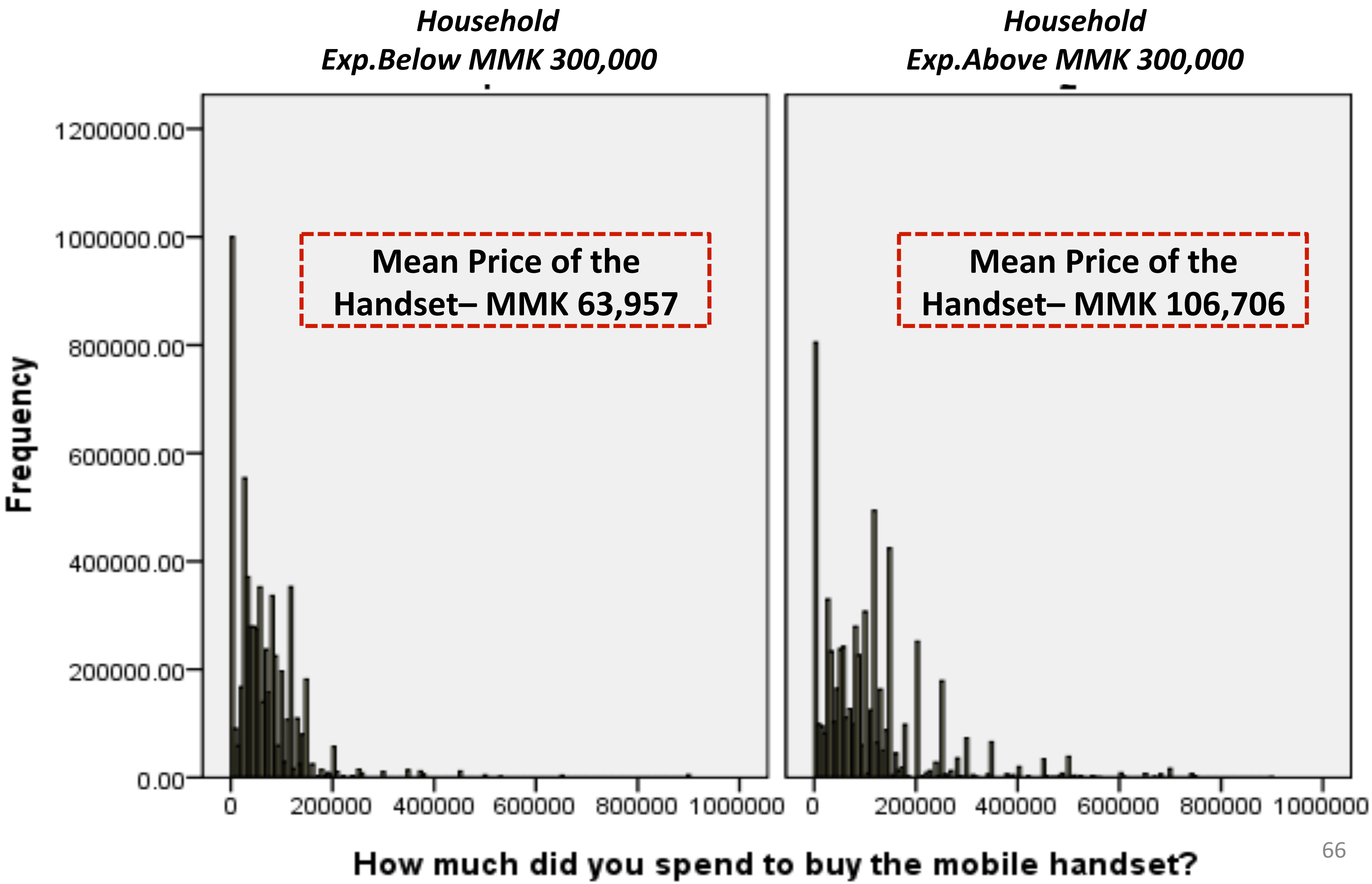
Base: Mobile phone subscribers

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

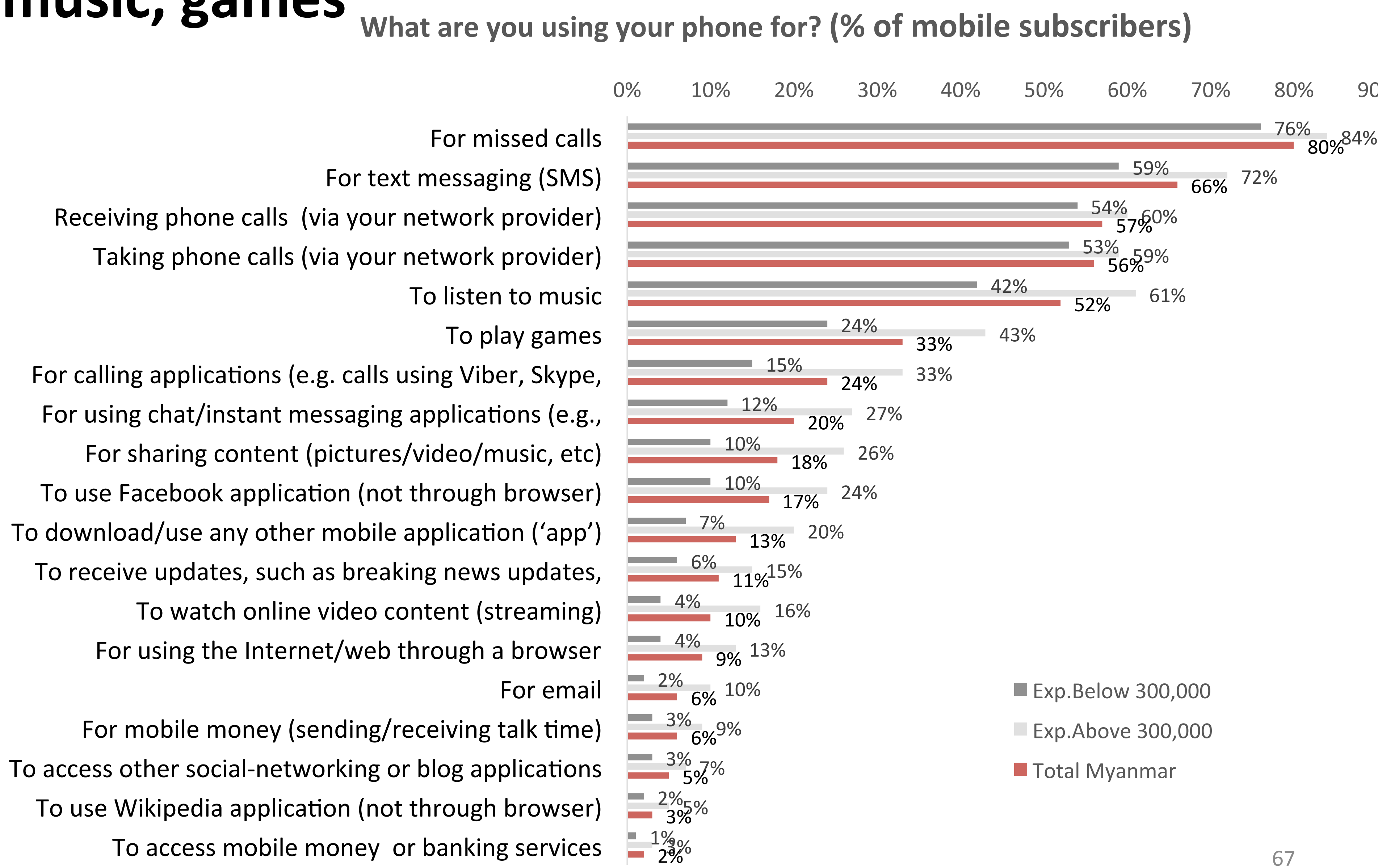


Base: Mobile phone subscribers

Richer households spend ~ 70% more on handsets than poorer households

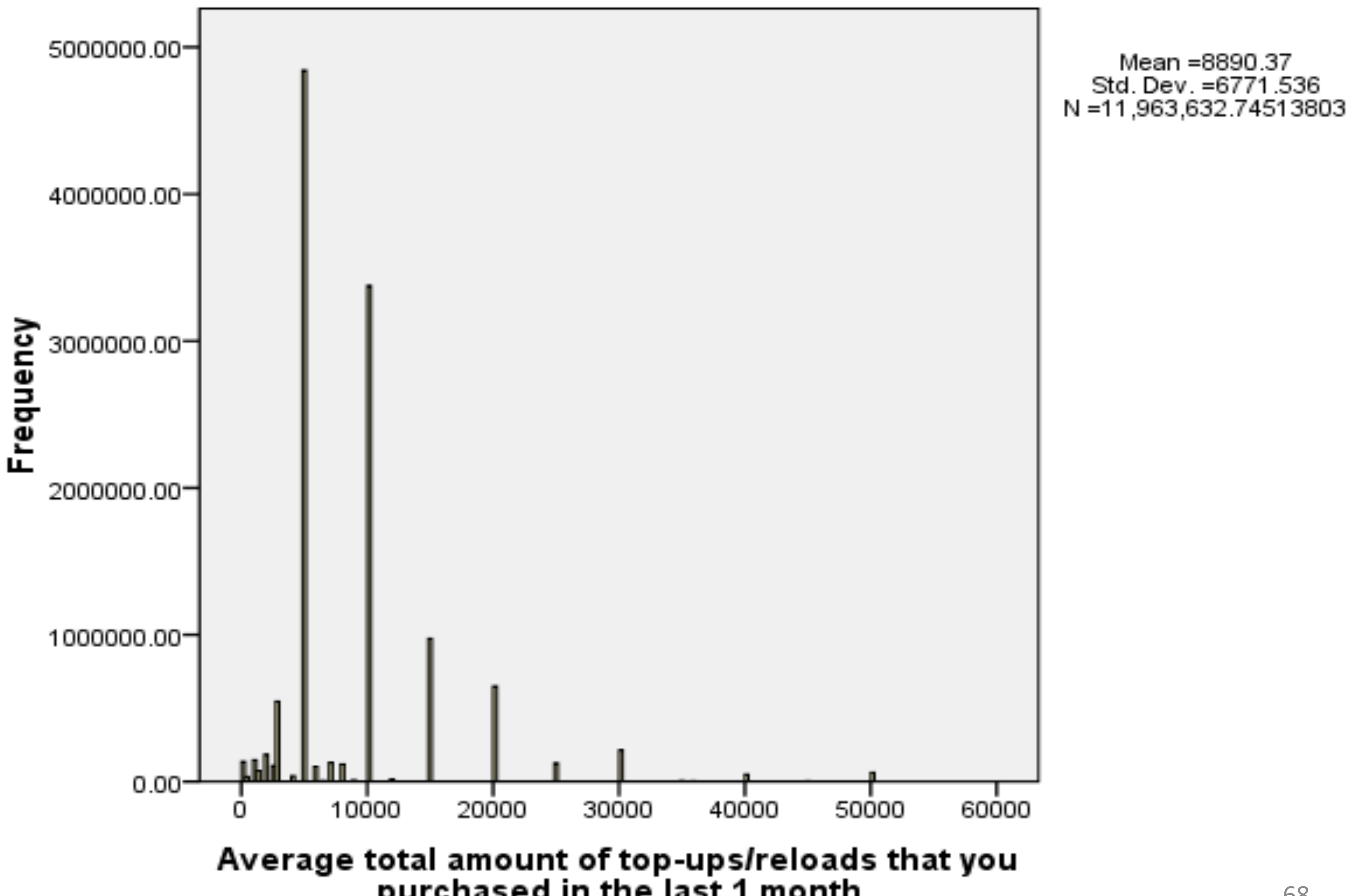


Mobile used mainly for voice, SMS, missed calls, music, games



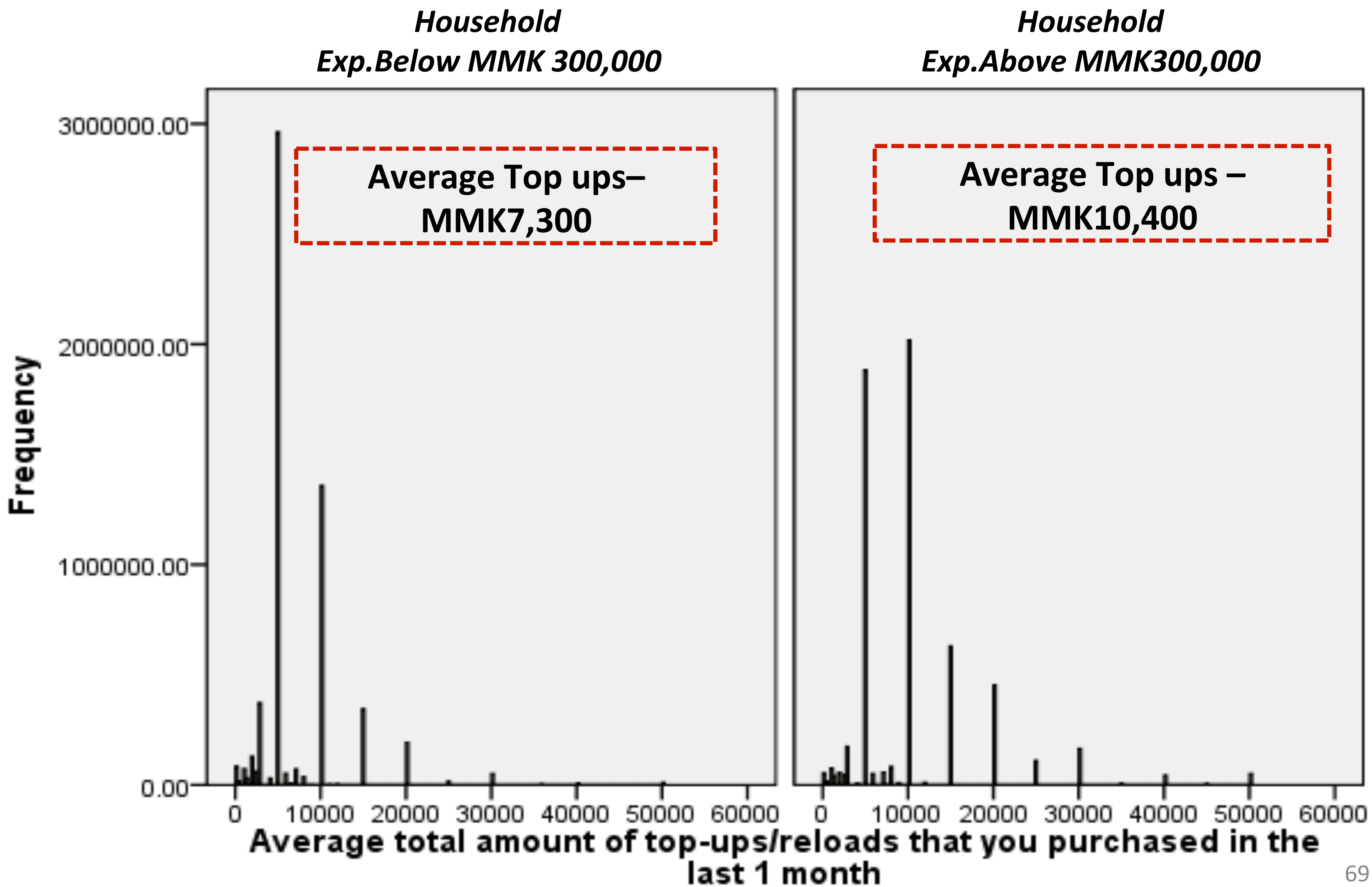
Base: All who own a mobile phone

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



Base: Mobile phone owners

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



Baseline survey findings

COMPUTER AND INTERNET USE

Computer use very low

Have you used a <u>computer</u> 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

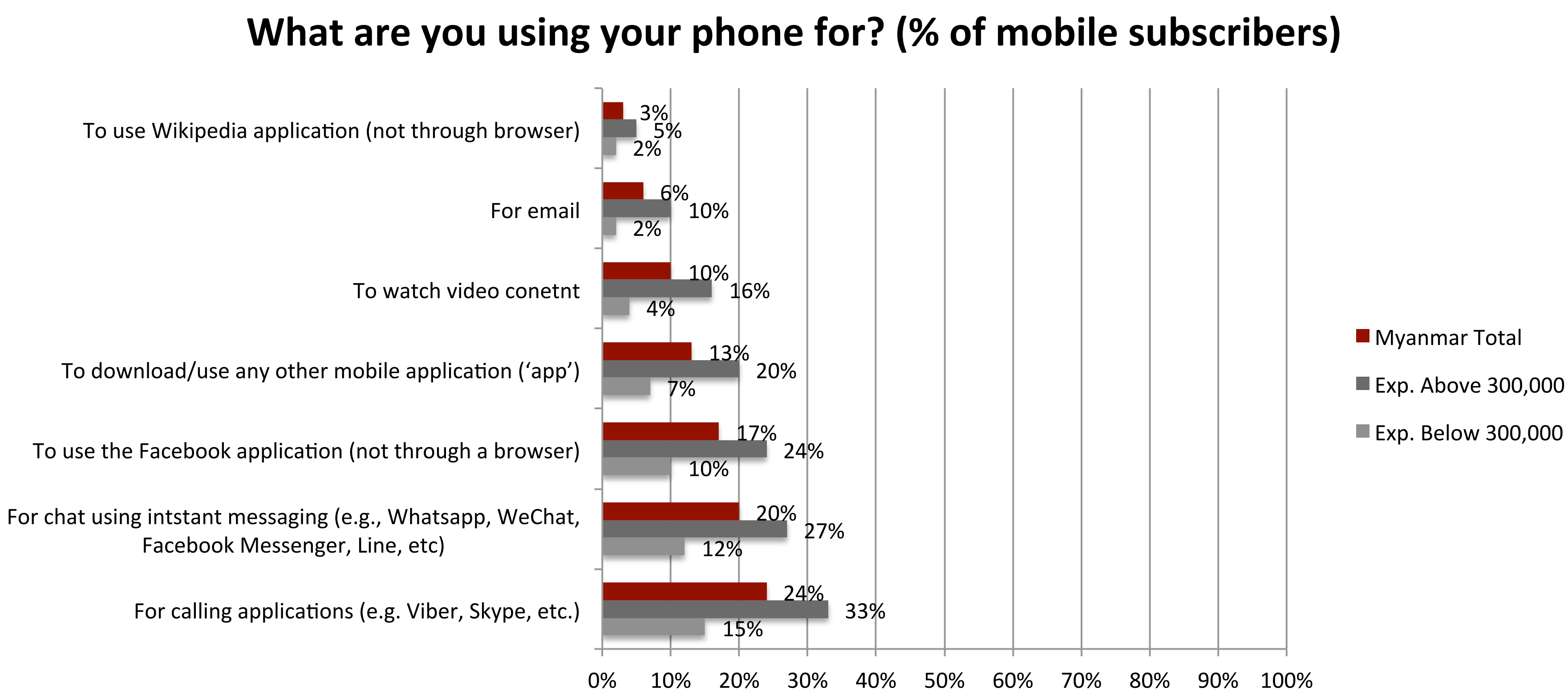
Have you used the Internet through a browser (e.g., UC Browser, Opera, , Chrome, Mozilla Firefox, Dolphin, Internet Explorer etc.) on a tab, computer or mobile phone in the last 12 months

	% 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

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



Base :Those who own a mobile

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%
Base : All mobile subscribers			

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%
Base: Those whose service provider offered 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

	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)

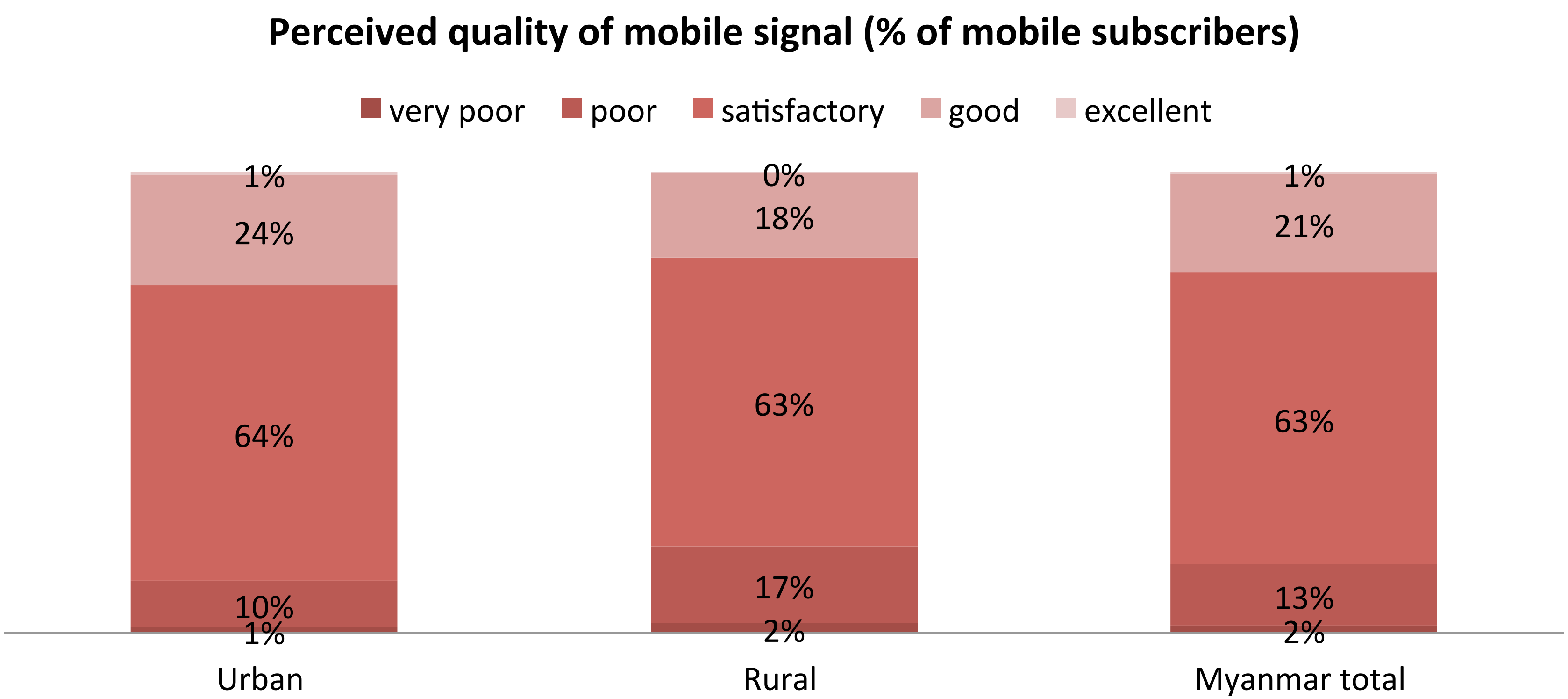
	Rural	**Urban**	**Myanmar Total (% 15-65 yr olds)**
For calling applications (e.g. Viber, Skype, etc.)	15%	33%	24%
For chat using instant messaging (e.g., Whatsapp, WeChat, Facebook Messenger, Line, etc.)	12%	27%	20%
To use the Facebook application (not through a browser)	10%	24%	17%
For email	2%	10%	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

Baseline survey findings

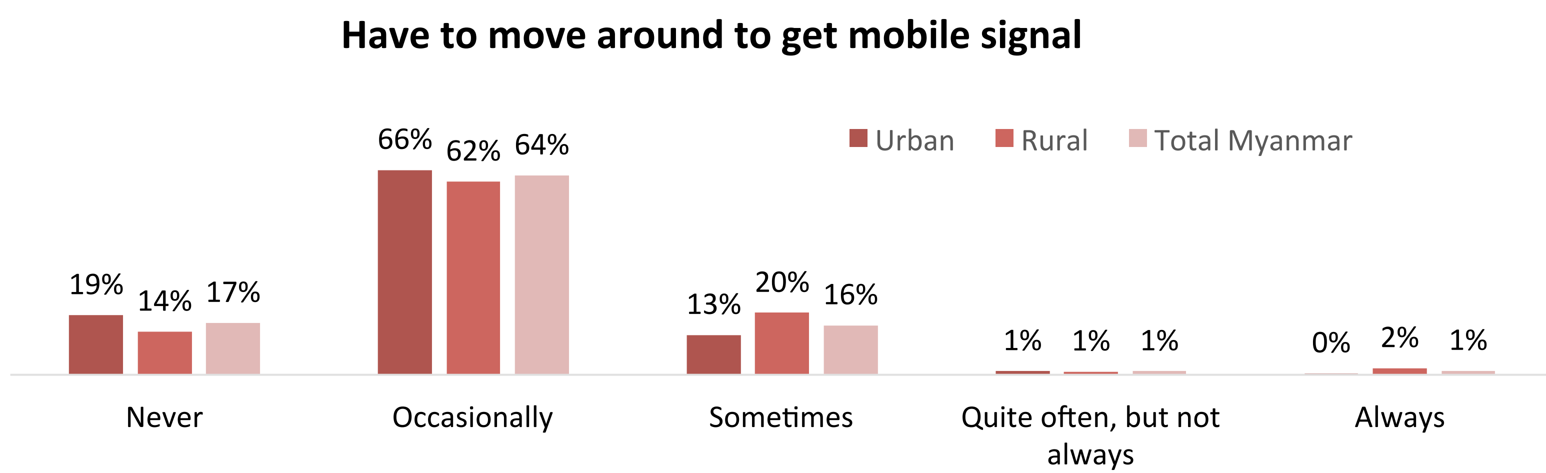
NETWORK QUALITY PERCEPTIONS AND MEASUREMENTS

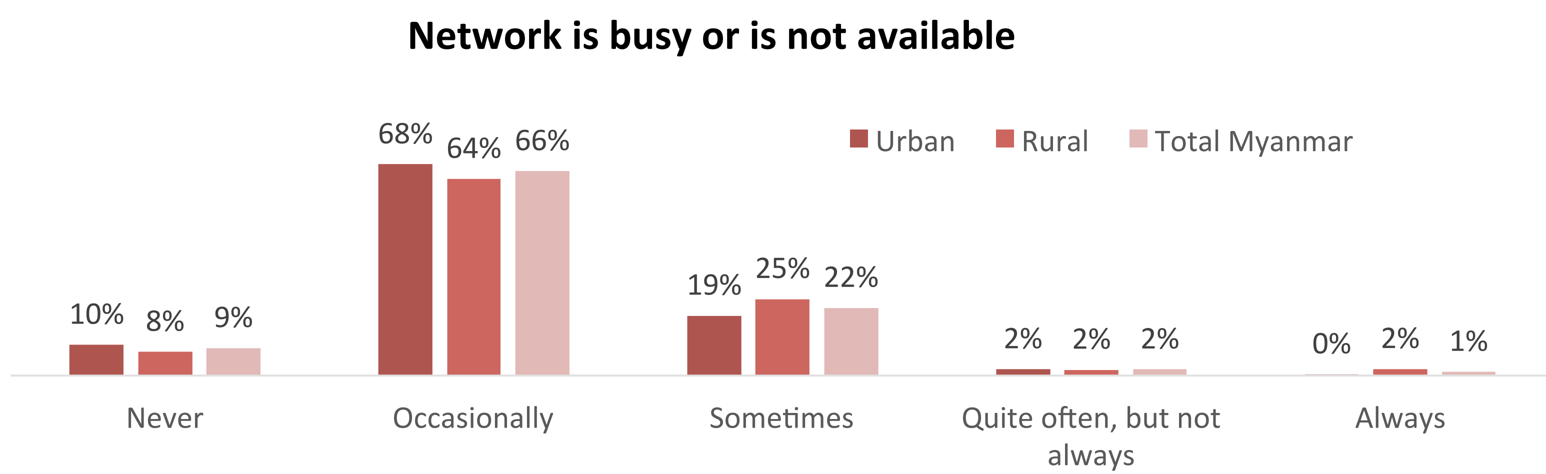
Overall satisfied with quality



Base: Mobile phone subscribers

Having to move around to find signal, network unavailability: experienced, but occasionally

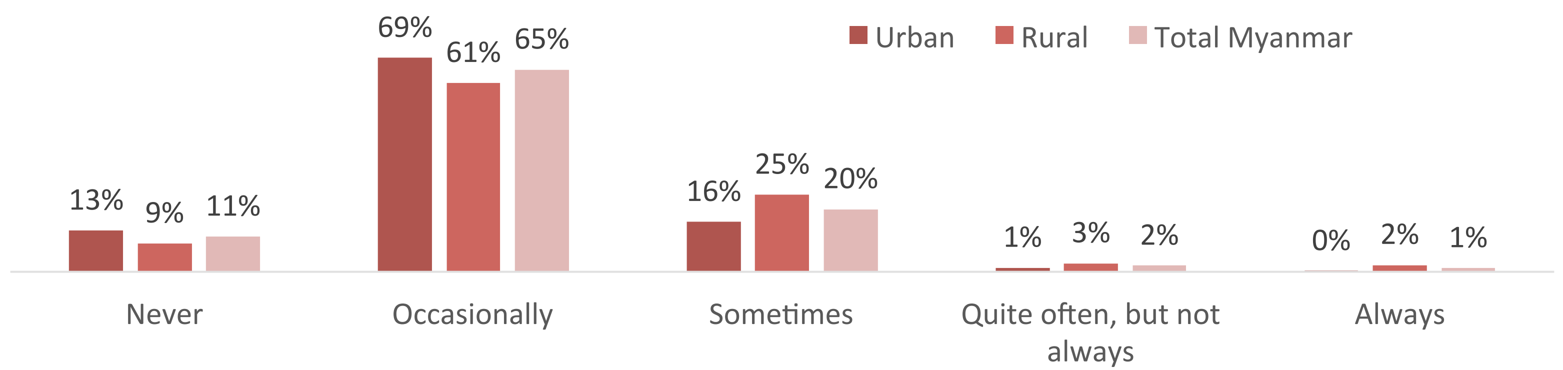




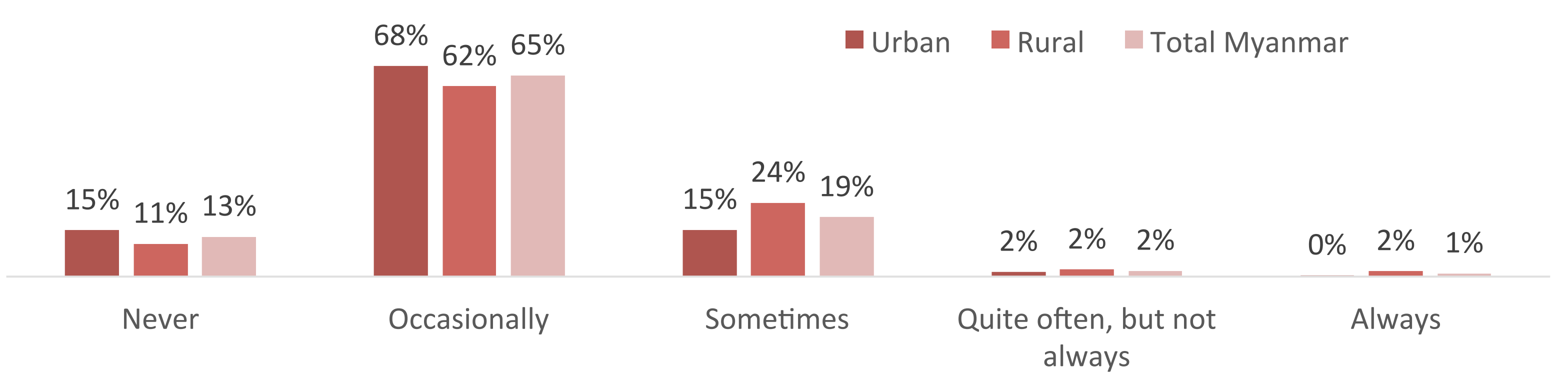
Base: Mobile phone subscribers

. . . as are unclear sound, call drops

Sound is not clear on phone calls/cannot hear the other person

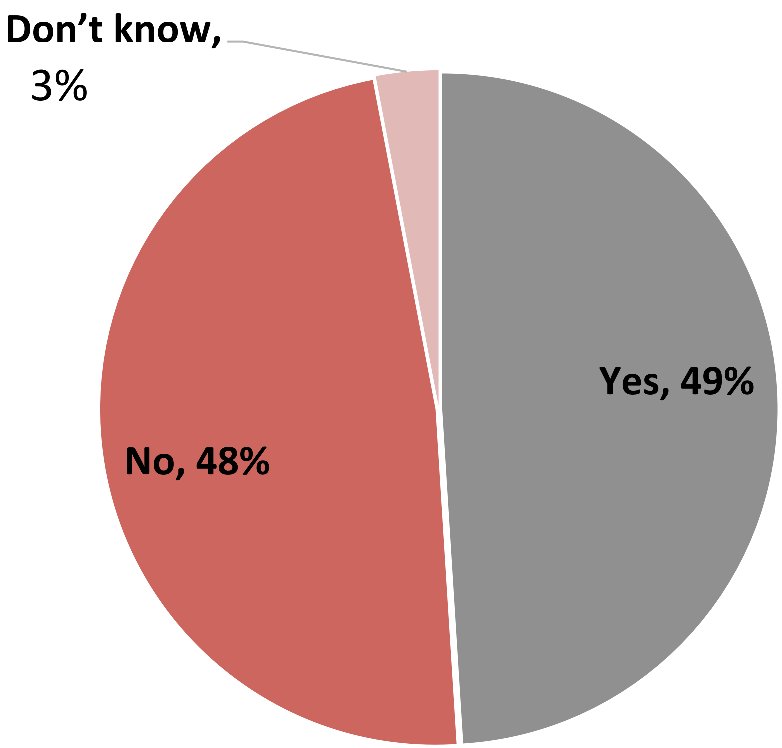


Calls are dropped before I'm done

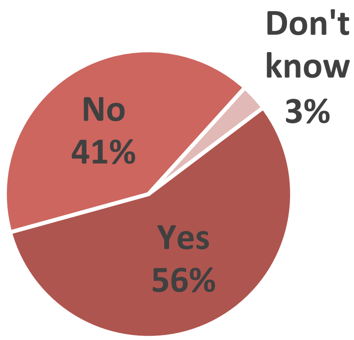


Base: Mobile phone subscribers

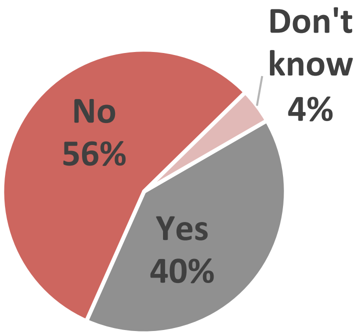
50% say calls not successful on first attempt. Problems greater in rural areas



URBAN
(% urban mobile subscribers)



RURAL
(% rural mobile subscribers)



Q: Most of the time, when you try to make a phone call, is it successful on the first try ?

Base: Mobile phone subscribers

Baseline survey findings

NON-SUBSCRIBERS

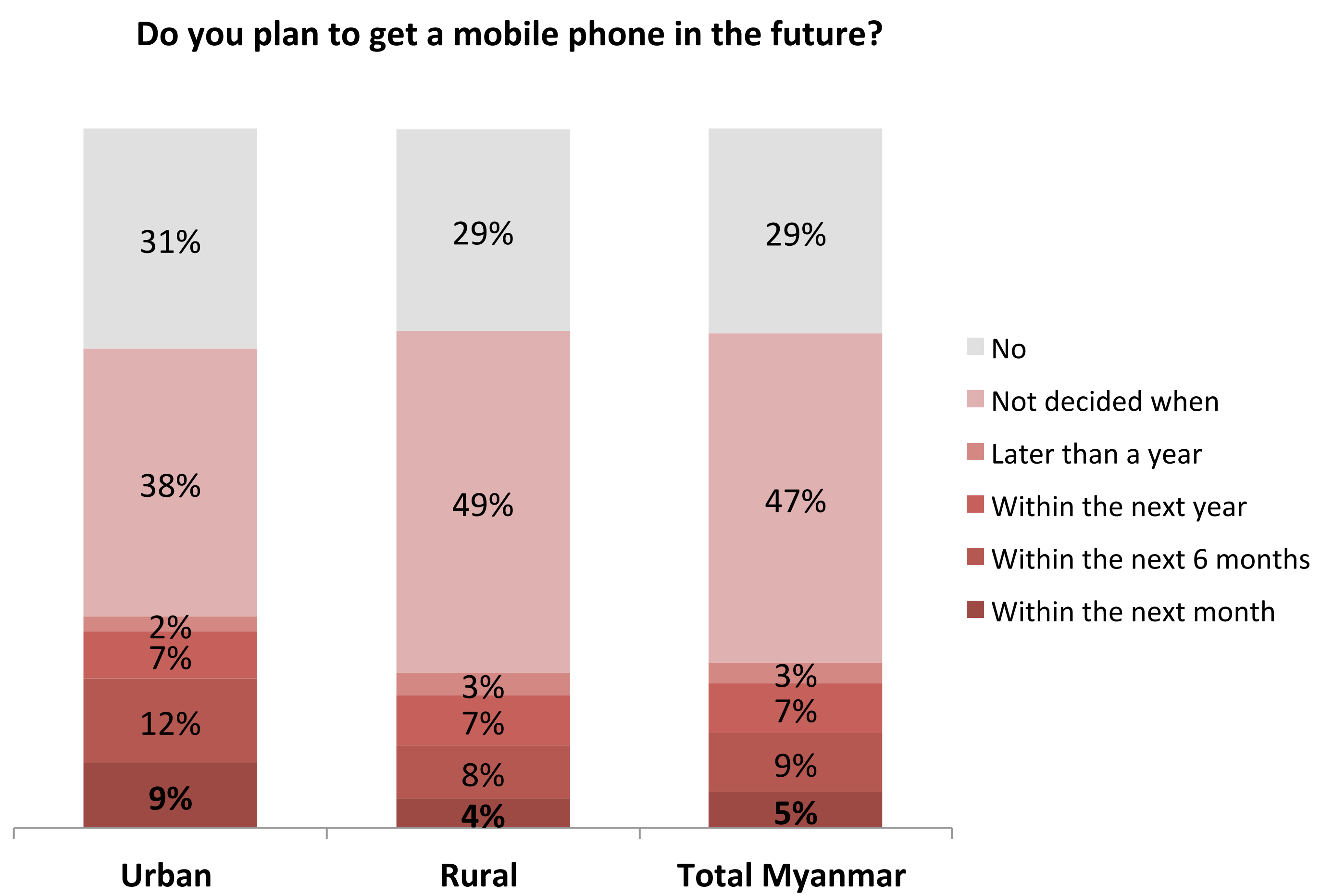
Affordability and perceived low utility most common reasons for not getting a mobile phone

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%

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

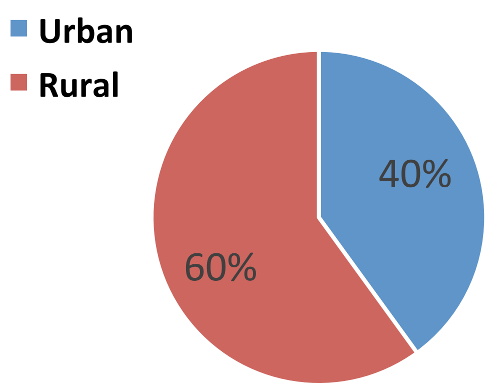
About 50% of non-subscribers expect to purchase handset/SIM in the coming year



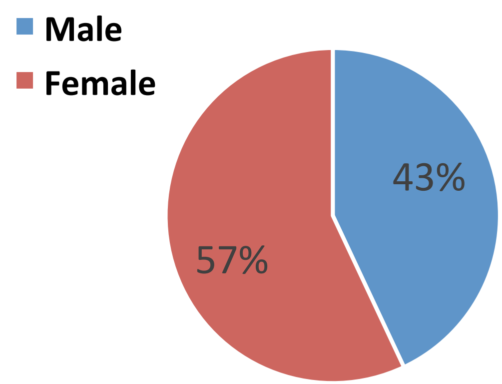
Base : Own neither mobile handset nor an active sim card

Who will buy? Mostly young, rural, females from lower spending families

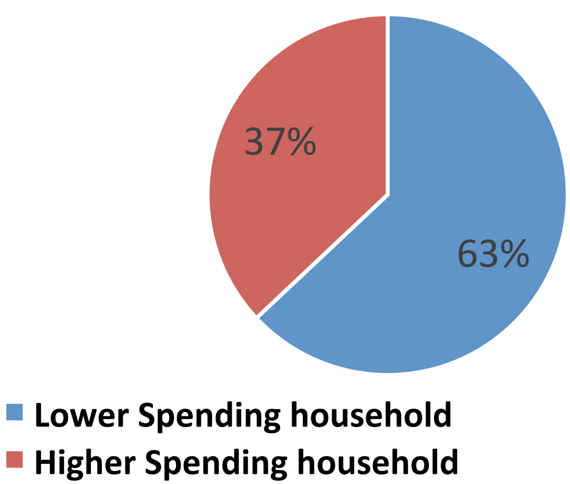
Profile by Urban/ Rural



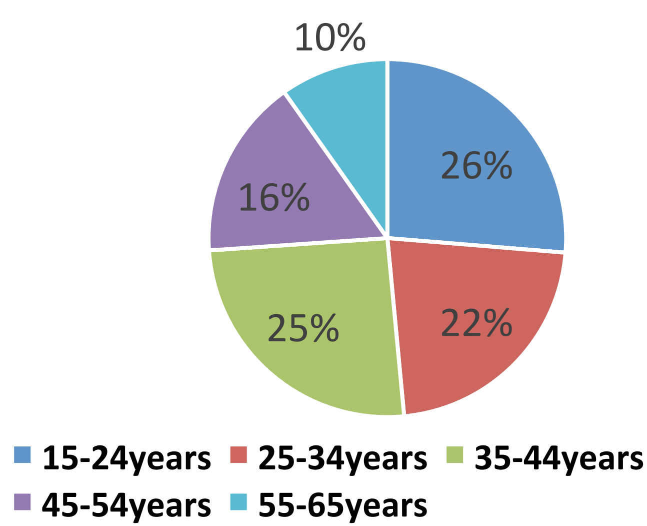
Profile by Gender



Profile by Household Spending



Profile by Age

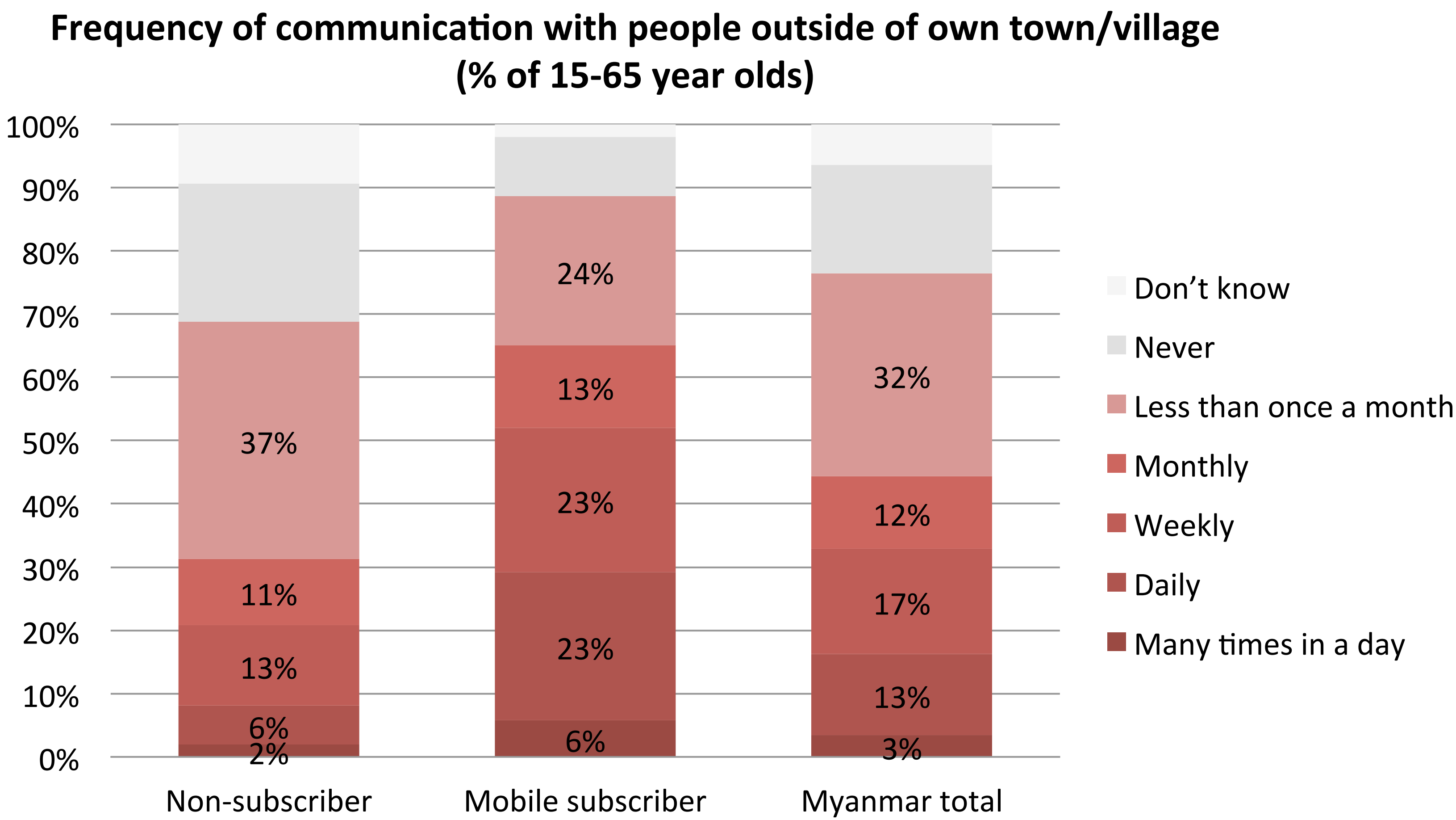


Base : Those who are willing to buy a mobile phone within a year

Baseline survey findings

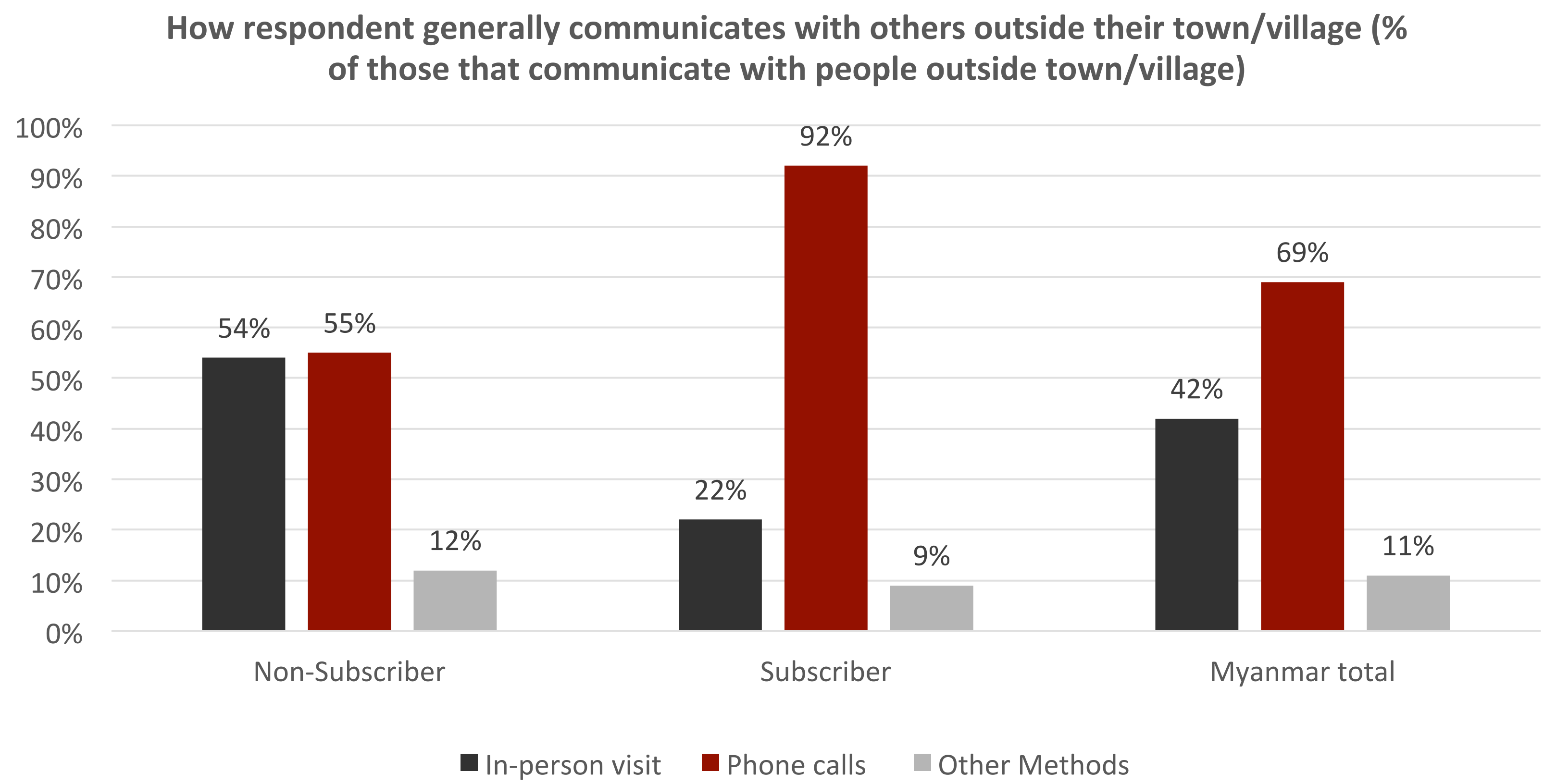
COMMUNICATION HABITS AND NEEDS

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



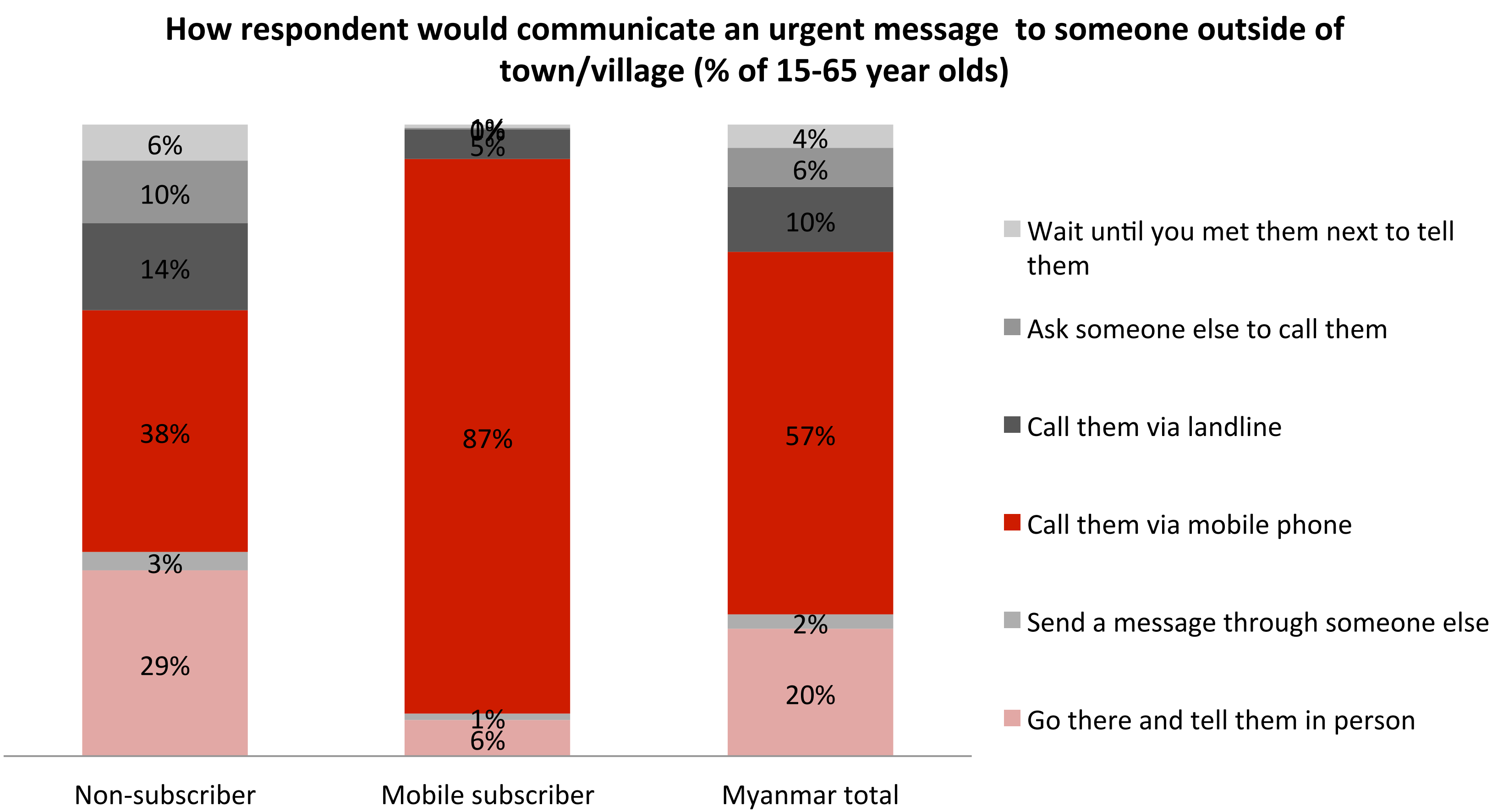
Base: All respondents

Most communicate 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

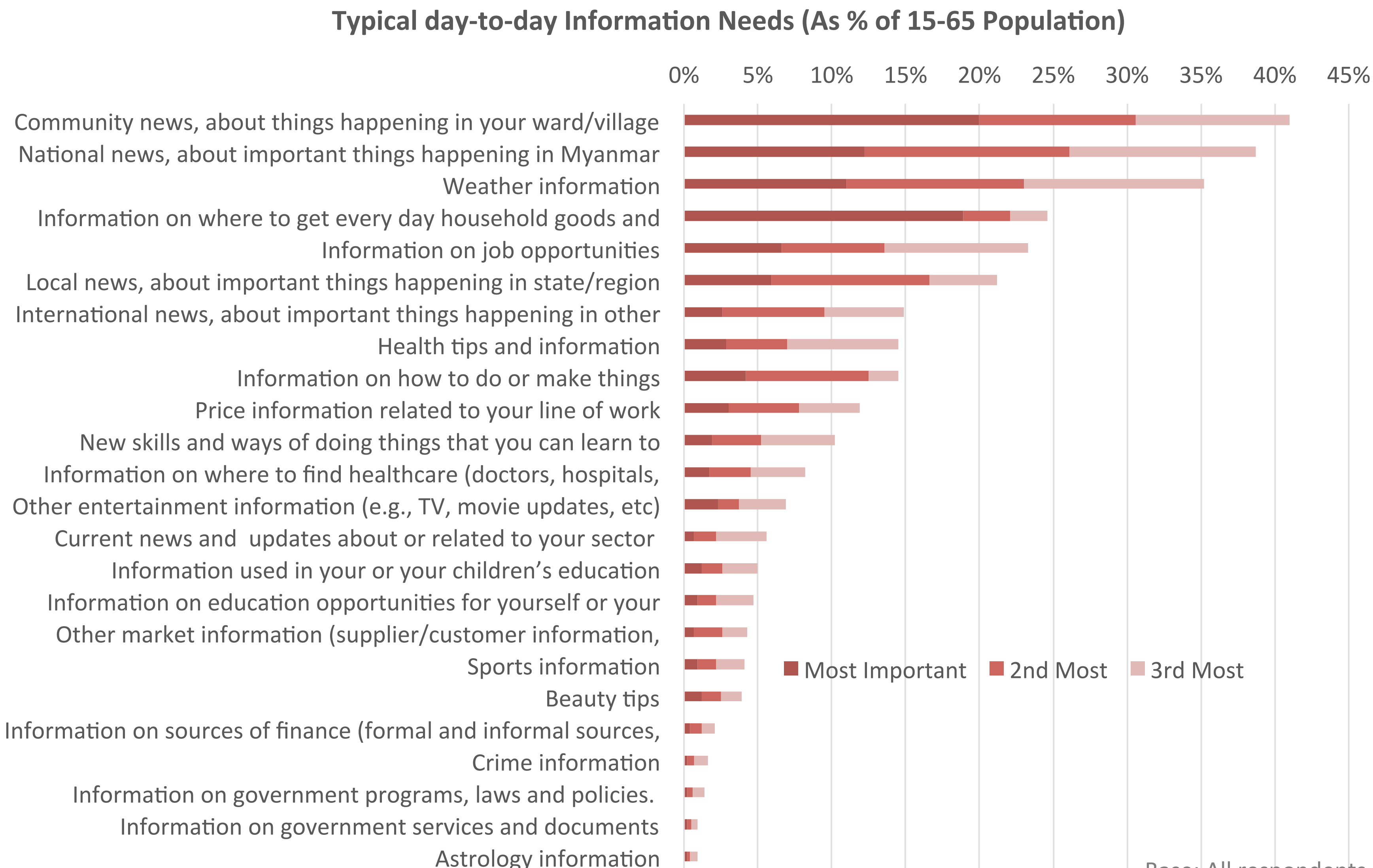


Base: All respondents

Baseline survey findings

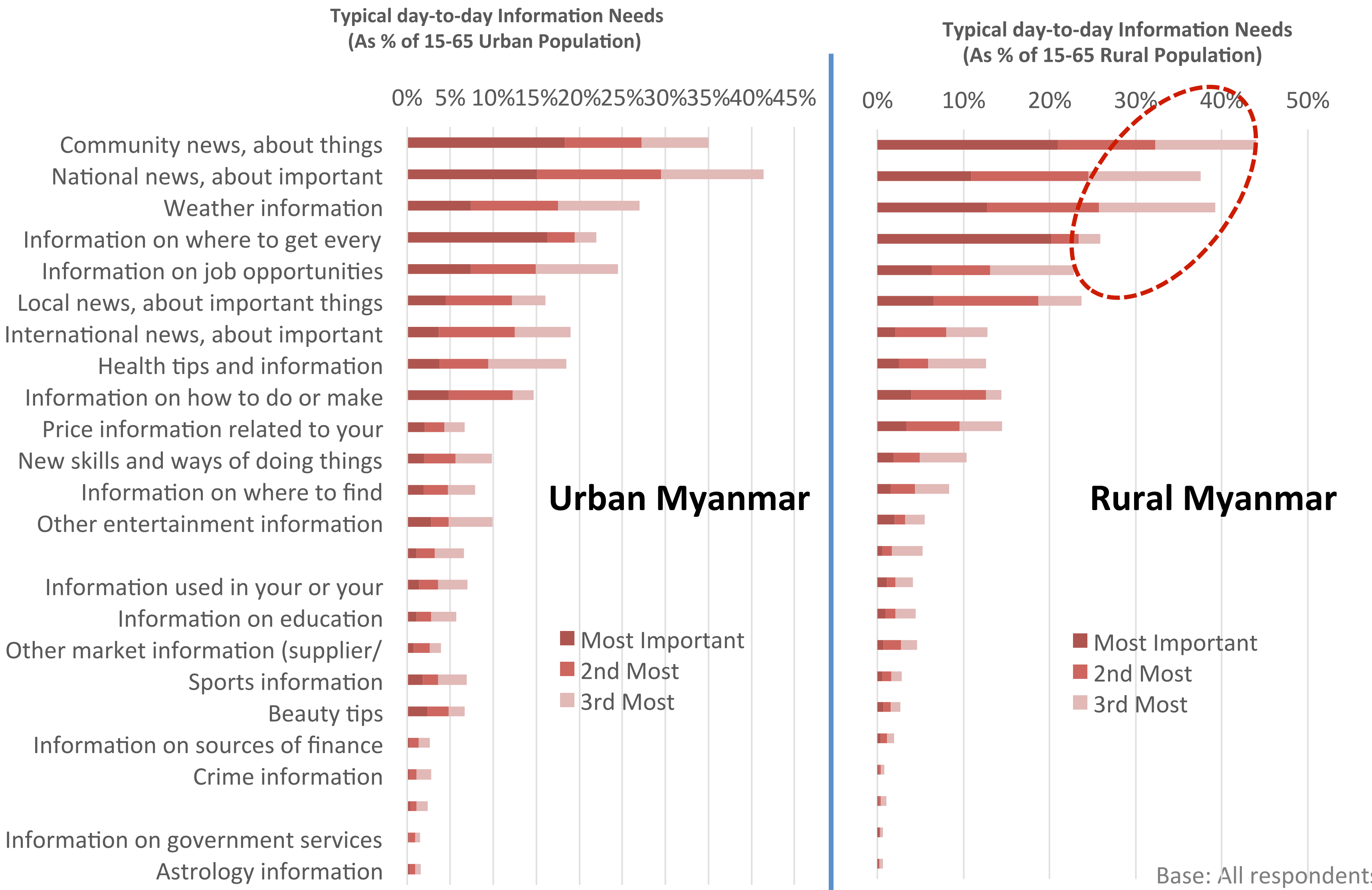
INFORMATION NEEDS

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



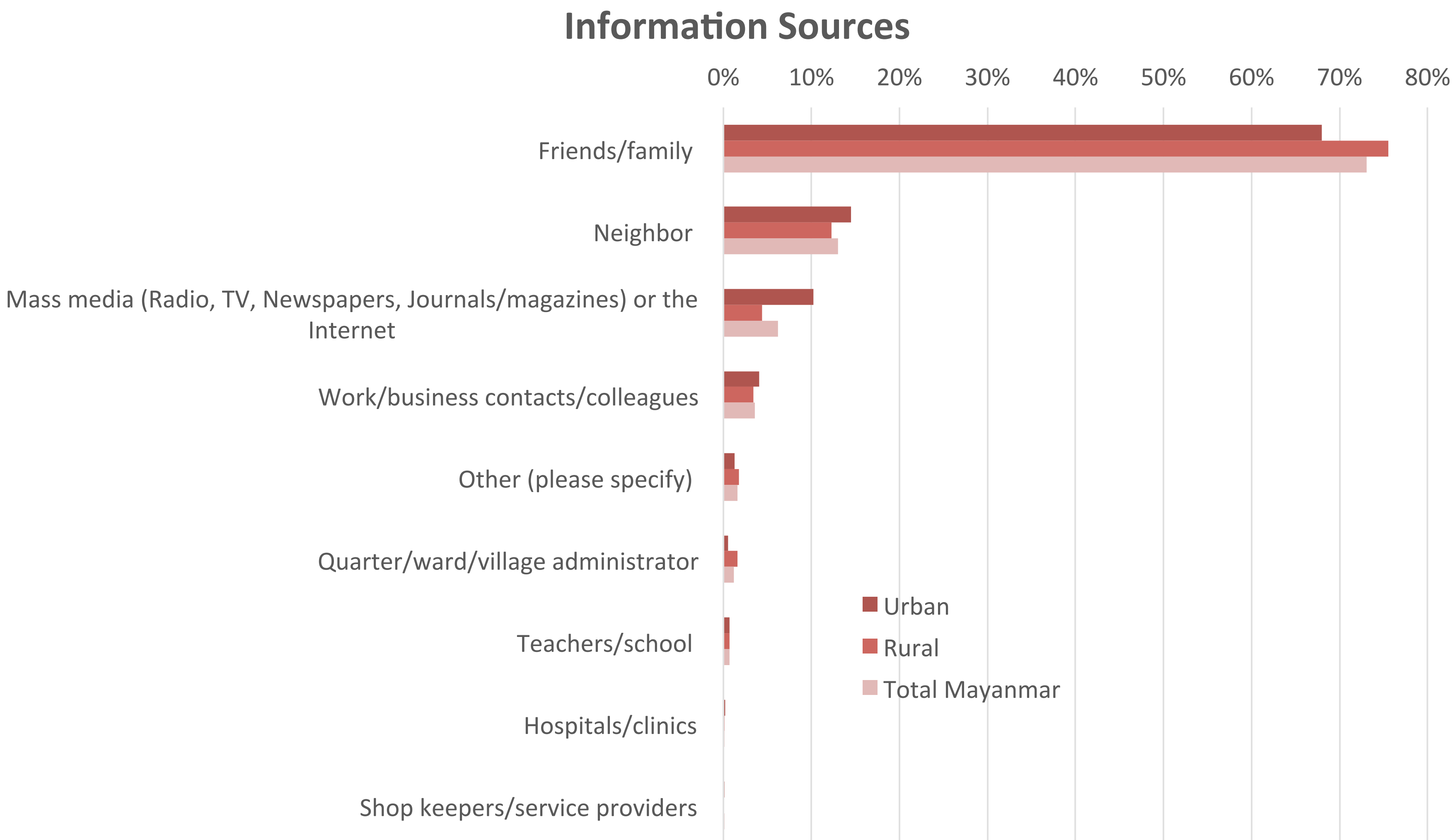
Base: All respondents

Urban and rural information needs compared



Base: All respondents

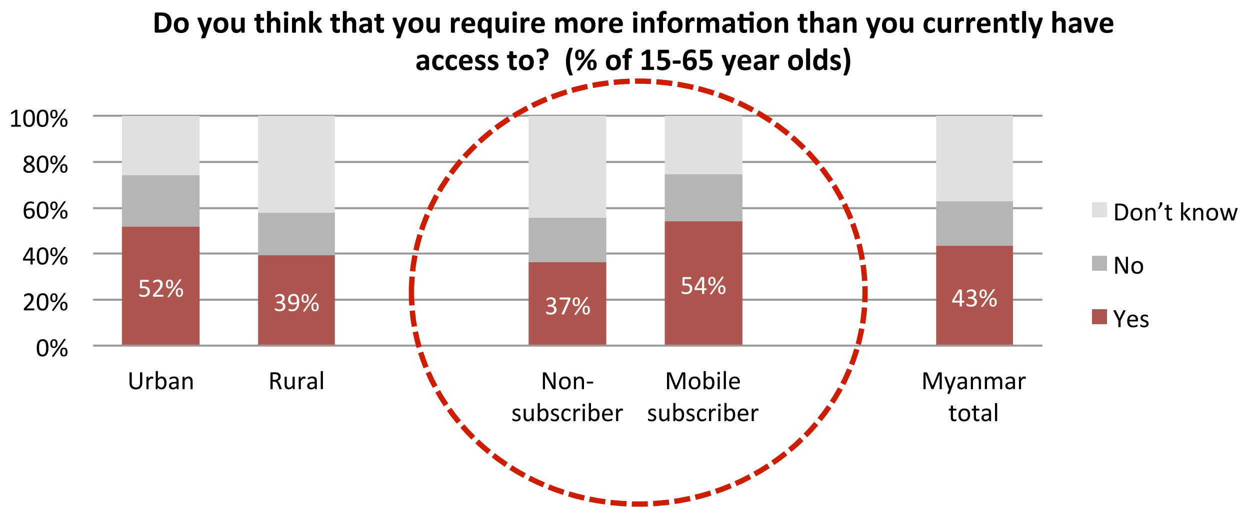
Friends, family and neighbors are main information sources today

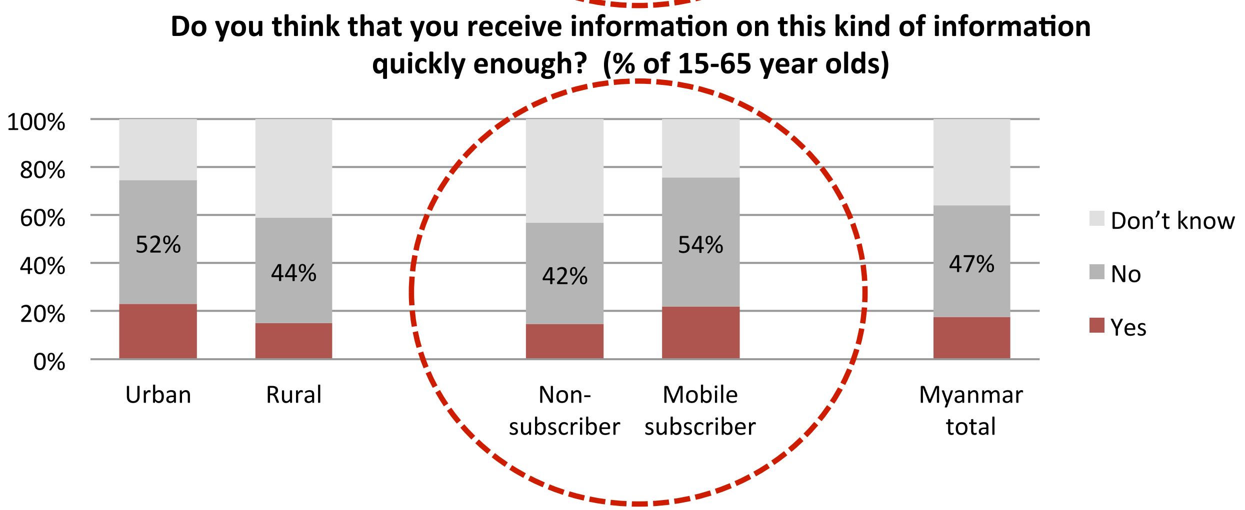


Q: Who do you usually obtain that kind of information?

Base : All respondents

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

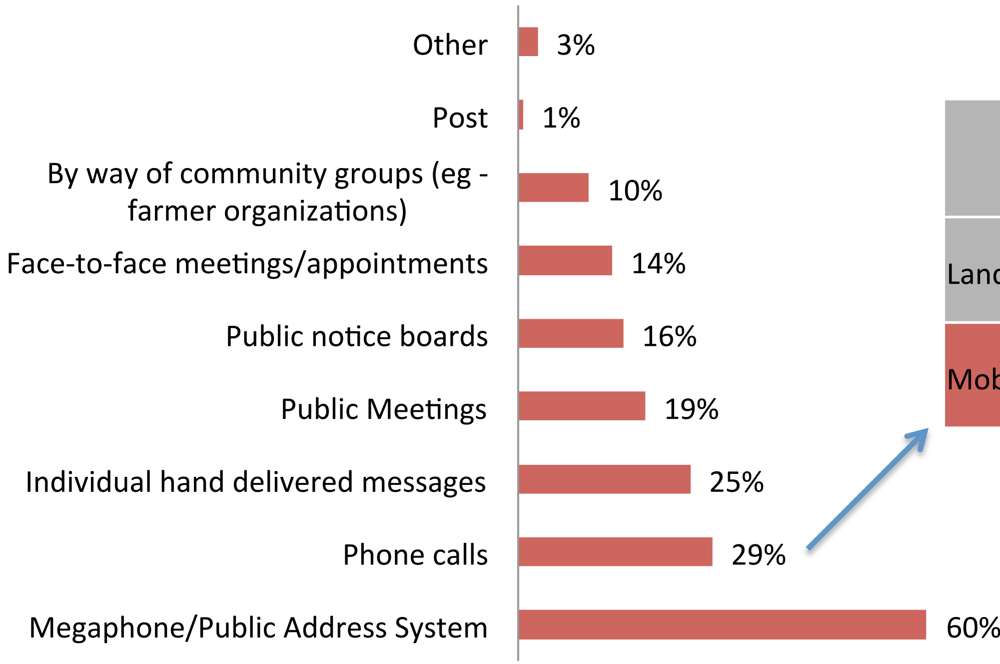




Base: All respondents

Ward/village leaders use phones as the second mode 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

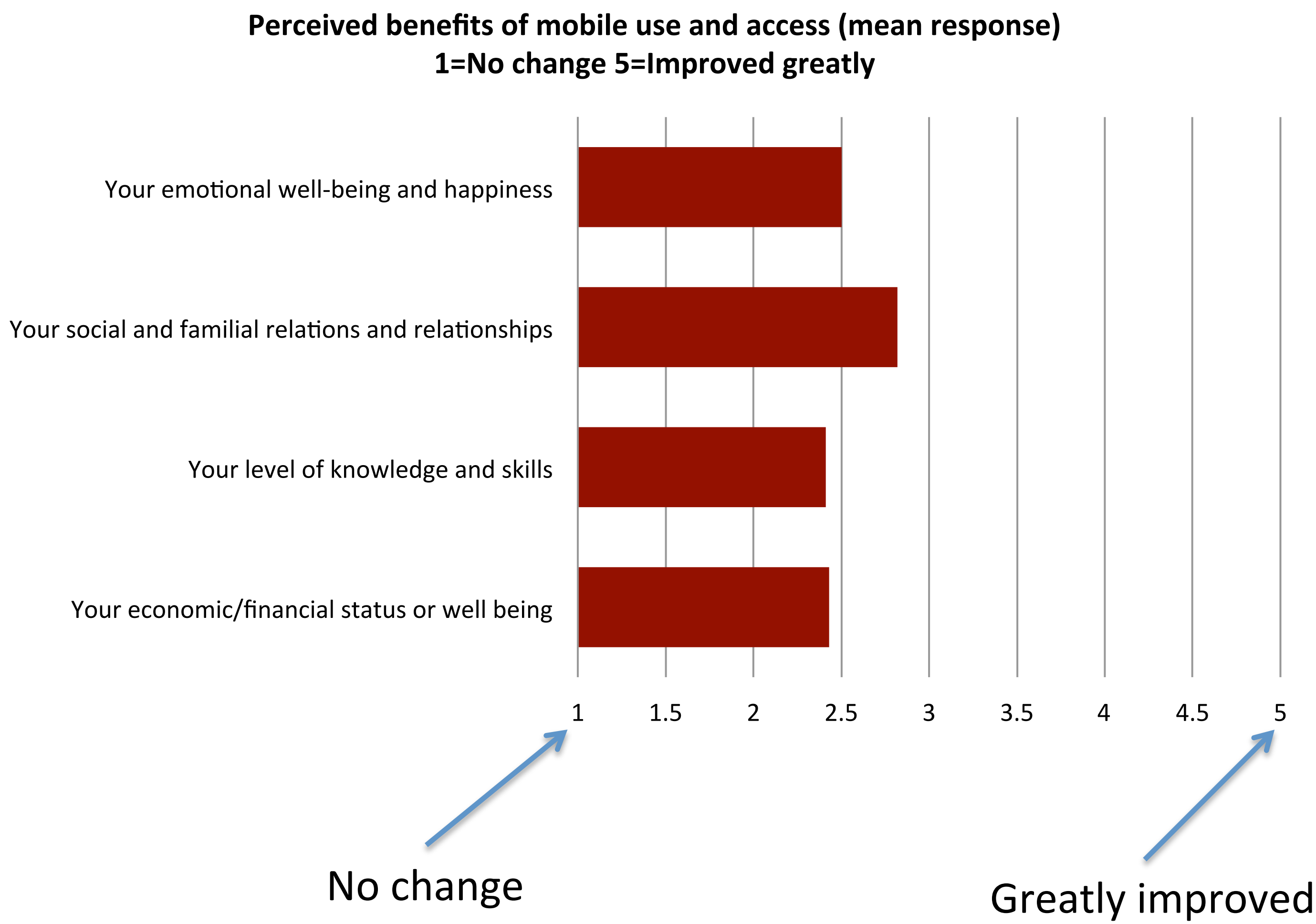
Opportunities to improve: information from superiors/peers still through physical visits

	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

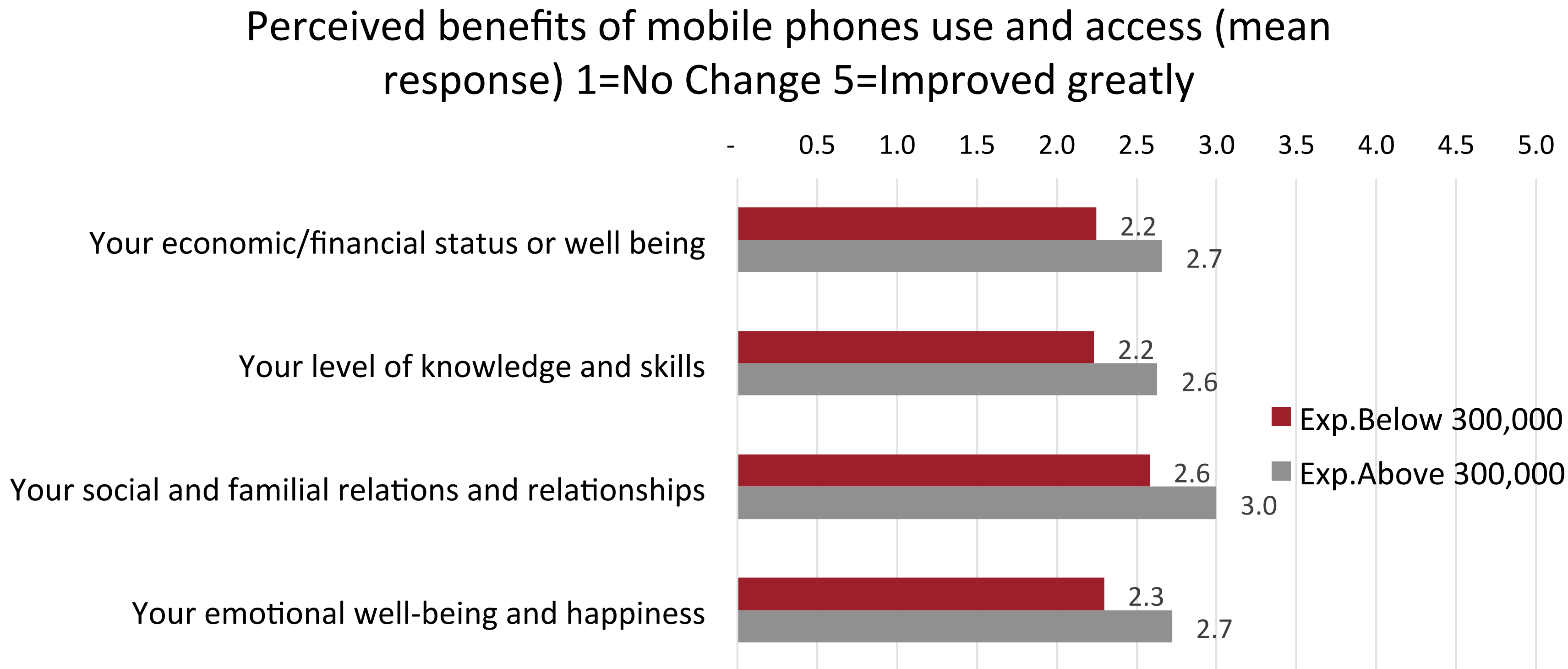
PERCEIVED BENEFITS OF MOBILE USE AND ACCESS

Overall low perceptions; greatest benefit seen on social and family relations/relationships



Base: All respondents

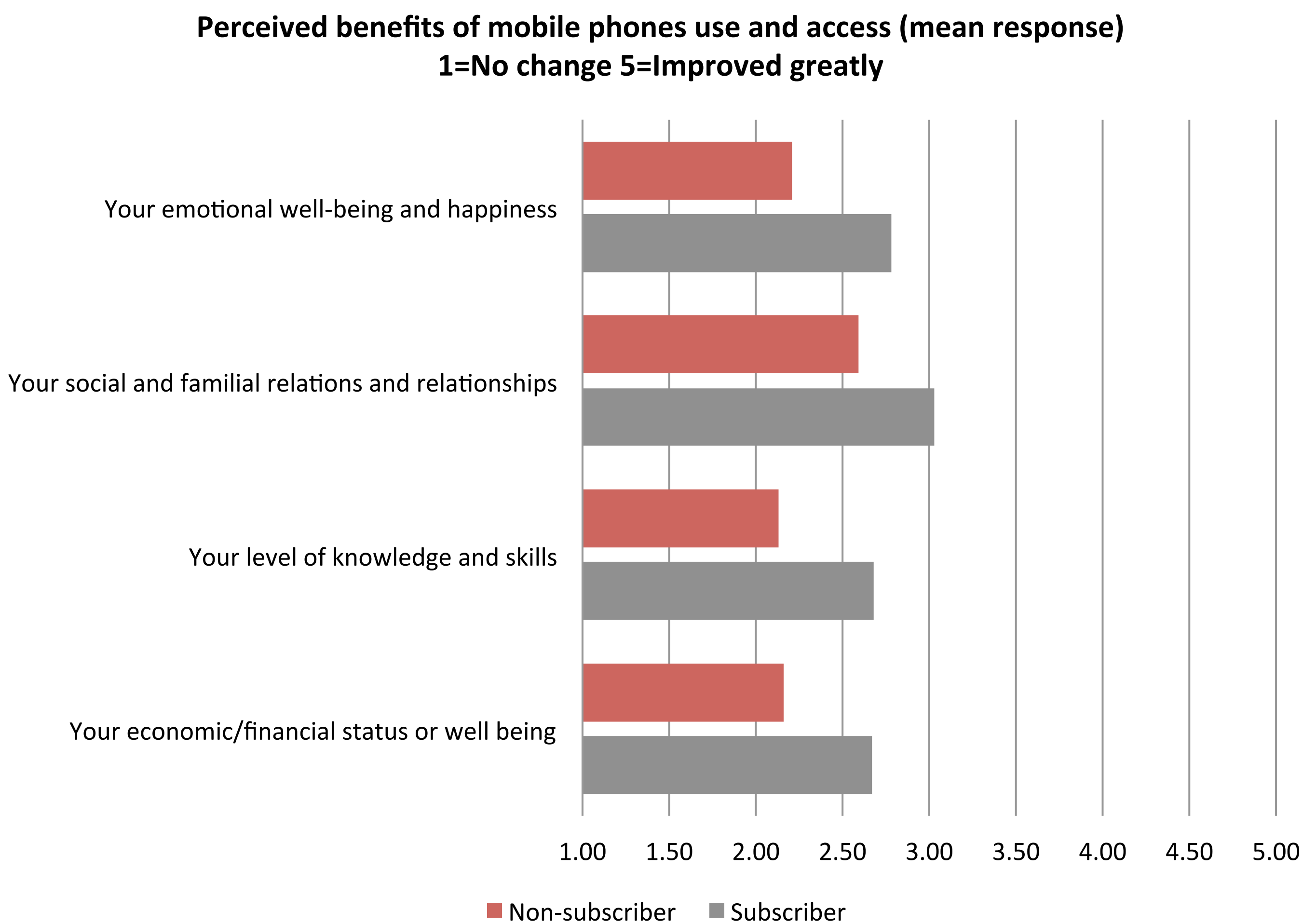
Higher-expenditure group sees greater benefits than lower group



Q: To what extent has your usage and access of a mobile improved the following, if at all? This can include mobile use through voice or data, and need not have been your own mobile.

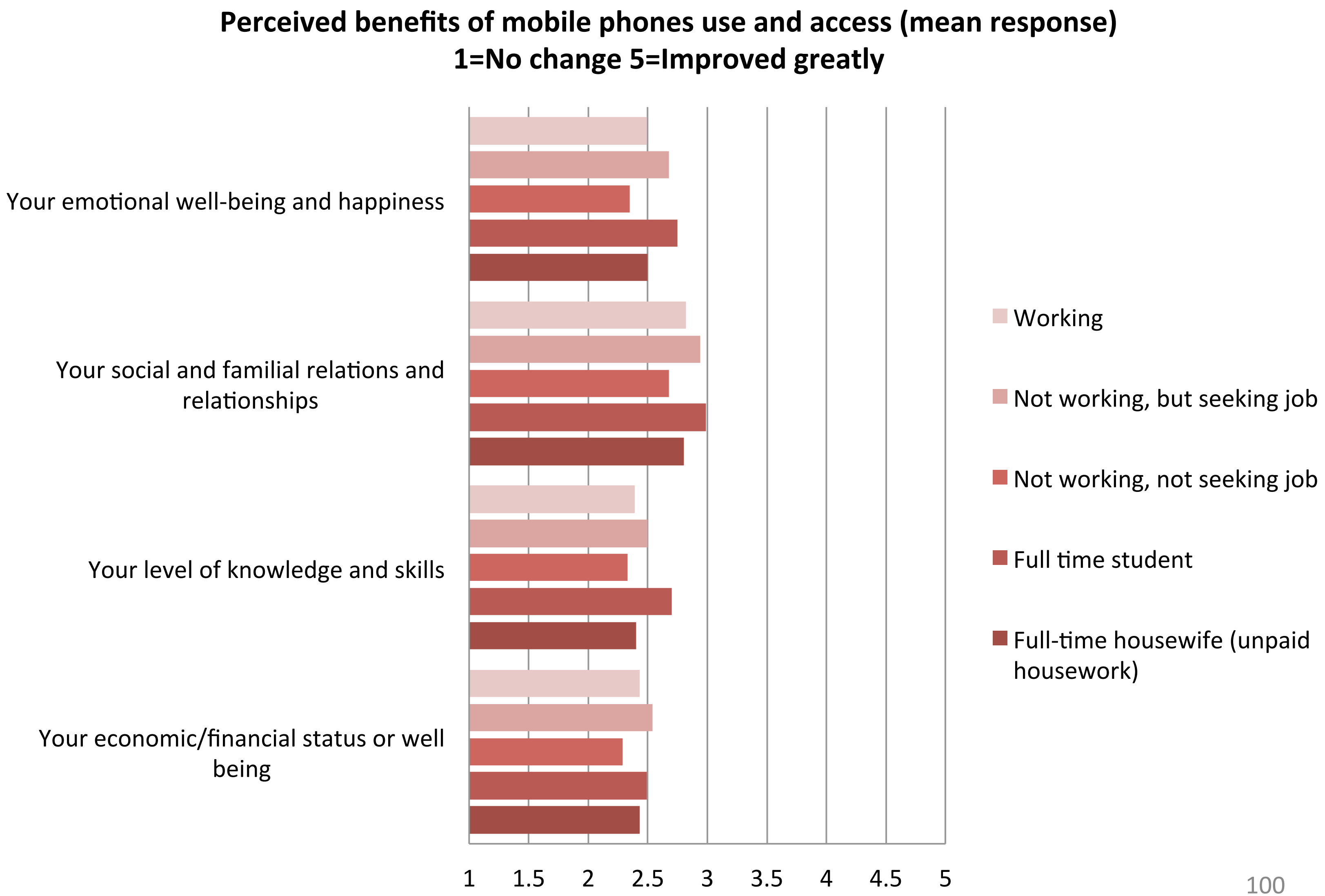
Base: All Respondents

Mobile subscribers see greater benefits than non-subscribers



Base: All respondents

Students and job-seekers see greater benefits than those who are working



Base: All respondents

New slide

GOING FORWARD

Upcoming demand-side research (2015 and 2016)

- Research:
  - Just finished field work (with GSMA)
    - Qualitative protocols to understand gender differences that are seen in this quant survey
  - End-line survey to assess socioeconomic impact of mobile (if any)
    - In 2016

FURTHER DETAILS

www.lirneasia.net

helani[at]lirneasia.net