Hello from the other side
Have Myanmar’s mobile adoption trends changed over the years?

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Yangon, Myanmar

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Mobile subscriptions per 100 increased from 7 to 88 within 5 years

Source: Mobile subscriptions per 100: Calculated based on data from operators.
Have the demographics of those getting connected changed over time?

If yes, do the uses of phones vary according to when individuals got connected?

If yes, could any other factors driven these changes?
Nationally representative survey on ICT use

- Data collected in Jun-Aug 2016 from 7,500 households from 375 ‘clusters’ (urban=wards; rural=village tracts)

- At 3% 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; representative of 298 of 330 townships
  - 32 townships excluded due to security concerns

Survey locations
Source: Survey Solutions
Increase in mobile SIMs per 100 accompanied drop in SIM prices

Source: Mobile subscriptions per 100: Calculated based on data from operators. Min, Fife & Bohlin (2014) and Nyunt, A. K. (2013). Historical exchange rates from oanda.com
Price of SIM used as an indicator of changes in telecommunications environment

Price of SIM at given time period (USD)

USD

- 200,000
  400,000
  600,000
  800,000
  1,000,000
  1,200,000
  1,400,000

Jan 2000-Dec 2010: 1,146,350
Jan 2011-Mar 2013: 228,435
Apr 2013-Jul 2014: 76,235
Aug 2014-Aug 2016: 8,080

Mobile ownership increased from 5% in 2010 to 61% in 2016

Mobile ownership as at date (% of population aged 15-65)

<table>
<thead>
<tr>
<th>Date</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec 2010</td>
<td>5</td>
</tr>
<tr>
<td>Mar 2013</td>
<td>17</td>
</tr>
<tr>
<td>Jul 2014</td>
<td>35</td>
</tr>
<tr>
<td>Aug 2016</td>
<td>61</td>
</tr>
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Mobile owner: Individual who owns both a mobile phone and an active mobile SIM
Mobile ownership increasing among both urban and rural populations

Mobile ownership as at time period– urban vs. rural (% of 15-65 population)

- Dec 2010: Urban 9, Rural 1
- Mar 2013: Urban 30, Rural 10
- Jul 2014: Urban 54, Rural 26
- Aug 2016: Urban 79, Rural 53

Legend: Urban, Rural
Gap between urban and rural populations steadily declining

Implications: Competition is doing a good job of getting phones into the hands of people
Early adopters are more likely to be Internet users today

Internet users as per time of getting connected (% of mobile owners aged 15-65)

- Jan 2000-Dec 2010
- Jan 2010-Mar 2013
- Apr 2013-Jul 2014

- Uses Internet
- Does not use Internet
Early adopters were more frequent users of Facebook

Facebook users as per time of getting connected (% of mobile owners aged 15-65)
The odds of being an internet user reduced for every year purchase was delayed (after controlling for gender, network effects etc.)

Binary logistic model run to determine impact of socioeconomic factors on Internet use

<table>
<thead>
<tr>
<th></th>
<th>Coefficient (β)</th>
<th>Odds ratio</th>
<th>Change in Odds Ratio due to 1 unit increase in variable</th>
<th>p-value</th>
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</thead>
<tbody>
<tr>
<td>Urban/rural (1=urban. 2=rural)</td>
<td>-0.219</td>
<td>1.244</td>
<td>-24.4</td>
<td>0.000</td>
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<tr>
<td>Gender (1= male, 2= female)</td>
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<td>-22.5</td>
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<tr>
<td>Ability to create login details (1=able to, 0=unable to)</td>
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<td>87.294</td>
<td>8629.4</td>
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<tr>
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<td>SIM purchase year (scalar variable)</td>
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Digital skills greatly improved the odds of using the Internet

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Low digital skills in Myanmar; less than 40% of mobile owners able to create log-in details

Digital skills (% of mobile owners aged 15-65)

- Search for information
  - Can, by myself: 22%
  - Can, with help: 11%
- Install an app
  - Can, by myself: 21%
  - Can, with help: 25%
- Create log-in details
  - Can, by myself: 18%
  - Can, with help: 21%
- Adjust app settings
  - Can, by myself: 19%
  - Can, with help: 25%
- Post information online
  - Can, by myself: 21%
  - Can, with help: 7%

Source: Authors based on LIRNEasia (2016)
Digital skills even lower among women

Digital skills (% of mobile handset owners who can perform the tasks by themselves or with the help of others)

<table>
<thead>
<tr>
<th>Task</th>
<th>Male Can by myself</th>
<th>Male Can, with help</th>
<th>Female Can by myself</th>
<th>Female Can, with help</th>
</tr>
</thead>
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<td>24</td>
<td>10</td>
<td>19</td>
<td>11</td>
</tr>
<tr>
<td>Install an app</td>
<td>25</td>
<td>23</td>
<td>16</td>
<td>27</td>
</tr>
<tr>
<td>Create log in details</td>
<td>20</td>
<td>20</td>
<td>15</td>
<td>23</td>
</tr>
<tr>
<td>Locate and adjust app/account settings</td>
<td>24</td>
<td>22</td>
<td>13</td>
<td>28</td>
</tr>
<tr>
<td>Post information online</td>
<td>6</td>
<td>6</td>
<td>7</td>
<td>7</td>
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</tbody>
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Implications: Skills matter, but skills are low and are lowest among women
Implications to policy

Implication: Market reforms have been successful in catalyzing mobile uptake and getting phones into the hands of rural population

Policy recommendation: Keep going
Implication: Age on the phone increases odds of being online

Recommendation: ?
Implication: Having digital skills increases one’s odds of getting online

Recommendation: Identify scalable and effective models to increase digital skills
Operators committed to undertake initiatives to promote digital skills

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<th>Telenor</th>
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<td>10,000 telecenters + schools &amp; hospitals</td>
<td>200 community centers with Internet</td>
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Look to assess usefulness of other programs to facilitate digital skill development

Mozilla Web Literacy Programme

UN Women Virtual Skill School

Google Digital Skills for Africa