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FINDINGS FROM NATIONAL MEDIA AUDIENCE SURVEY

Investing in Independent Media

November 2022

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EXECUTIVE SUMMARY

In general, there is sustained access to independent media in Myanmar despite the challenges in the aftermath of the coup. Data shows that people can access news without any issue on daily, weekly, and monthly basis. The level of interest in the news is high, 74%, and one of the reasons in following news is to get current updates on political and economic crises.

Facebook is most widely used to access news, and it is more prevalent in urban areas and among youth. TV with satellite dishes is used by communities and rural and conflict affected areas where there is no access to the internet. With Facebook and satellite TV combined, there is a potential of reaching 67% of the total audience.

Over 80% of online users use mobile data. Due to the increased cost of mobile data, more than half of them had to reduce the time of using the internet. An internet package that costs MMK 1,000 used to last three days but now it lasts for only one day. It also affects the use of video platforms such as YouTube.

Audience from conflict-affected areas are more active in checking news especially for security updates. It is part of their day-to-day activities to check the security situation such as military checkpoints and clashes to keep themselves safe.

Half of Facebook users are now capable of using VPN by themselves even though it was quite challenging in the beginning. Other aspects of digital security are not widely practiced. Only 20% of respondents have locked their profile, and 21% kept their personal information, such as phone number, private in their accounts. There is a higher level of digital literacy among younger users, and they are more likely to engage with news posts as their accounts are protected.

The most popular news agency is Mizzima. It has become more popular after the coup by providing political updates which resonate with the needs and interests of the audience. One of the advantages of Mizzima is being able to reach the audience from multi-media platforms. Those with interest in politics are more likely to be Mizzima's audience, and they consider Mizzima's news reflect the real situation.

Up to 78% of the audience perceive that the news provided by the media meets their needs and is sufficient. While they reckon that political news will be the priority as long as the political situation remains unresolved, the respondents wish to receive additional information on commodity prices, health, and explosion/clashes, reflecting the current concerns over inflation, COVID-19, and security.

The audience perceives there is "50/50" media freedom in Myanmar between the SAC and independent media. While they wish to continue receiving news updates real time and with reliable information, the message from the audience to the independent media is "To provide news with the highest level of accuracy and as fast as possible, and to be bold in standing up for truth without any bias."

BACKGROUND

The national media audience survey was designed and implemented by BBC Media Action with the purpose to inform USAID Investing in Independent Media (IIM) project on post-coup media landscape in Myanmar. As the lead implementer of IIM, Internews has provided input on survey questionnaire during technical review. Data collection was outsourced to an external research agency, ThirdEye, to conduct phone interviews for the survey and individual in-depth interviews. Data collection period was September 2022-October 2022. BBC Media Action conducts data analysis and prepares the report of findings.

RESEARCH OBJECTIVES

The national media audience survey was designed and conducted with the aim to understand changing trends in media landscape including access to media platforms, needs and interest of audience, and perception on the quality of the news and information in a post-coup media landscape in Myanmar.

The research objectives defined for the survey are as follows:

- To understand media habits by learning the practice of people in following news and information.
- To measure media access including the extent to which people can access media from different platforms including digital media platforms.
- To study media literacy and the risk of misinformation/disinformation by studying the ability of the audience to critically evaluate the source of news and fact-check the information.
- To find out topics of interest on news and information and level of trust on news agencies.

METHODOLOGY

In accordance with the objective of the research which aims to generate audience data at the national level, the survey employs multi-stage stratified sampling method to ensure that the sample is representative at the national level and has the same proportion as the population.

Detailed steps taken in sampling procedure are as follows.

Sampling of Wards/Villages

First, a total of 308 primary sampling units, including 93 wards and 215 villages, were randomly selected from 14 states and regions by using probability proportionate to size (PPS) method. Census data is used as the sampling frame for the selection of wards and villages. PPS allocates the number of wards and villages to be selected for each state/region proportionate to the population of the state/region. Within each state/region, wards and villages with larger population have a higher chance of being selected.

Sampling of Households

Next, 12 households were randomly selected from each ward and village based on the list of 40 households provided by the field team.

Sampling of Individuals

Then, one representative from each household was randomly selected by using a Kish Grid. By using a multi-stage stratified sampling method, a total of 3,696 respondents were sampled for the survey.

Breakdown of the sample

Sr.	State/Region	Male	Female	Urban	Rural	15-24	25-34	35-44	45-54	55-64	65+	Total
1	Yangon Region	231	237	312	156	119	133	97	68	37	14	468
2	Mandalay Region	194	202	144	252	113	96	85	53	30	19	396
3	Ayeyarwady Region	196	200	48	348	98	103	79	61	37	18	396
4	Shan State	189	183	87	285	105	98	78	56	24	11	372
5	Sagaing Region	173	175	60	288	115	99	59	48	22	5	348
6	Bago Region	153	159	72	240	74	72	59	53	37	17	312
7	Magway Region	125	127	48	204	58	59	55	39	28	13	252
8	Kachin State	72	72	60	84	47	35	32	17	8	5	144
9	Kayah State	72	72	36	108	37	36	27	28	10	6	144
10	Kayin State	72	72	36	108	38	35	26	24	15	6	144
11	Chin State	73	71	36	108	47	36	28	15	9	9	144
12	Tanintharyi Region	72	72	36	108	45	52	25	14	7	1	144
13	Mon State	71	73	48	96	38	32	34	21	15	4	144
14	Rakhine State	71	73	36	108	49	48	19	14	12	2	144
15	Nay Pyi Taw Council	72	72	48	96	37	33	30	20	17	7	144
	Total	1,836	1,860	1,107	2,589	1,020	967	733	531	308	137	3,696
		50%	50%	30%	70%	28%	26%	20%	14%	8%	4%	

Individual In-Depth Interviews

In addition to the survey, 48 individual in-depth interviews were conducted equally among men and women. During the interviews, which were conducted by phone, individual media consumption behaviors were discussed in detail covering the purpose of following news, most accessed media, topics of interest, digital literacy, and willingness to pay for news.

CHALLENGES AND LIMITATIONS

- Challenges in data collection and measures taken to manage challenges

Data collection for the survey was outsourced to an external research agency. The RFP was sent to three potential agencies within BBC Media Action network. It was not announced publicly due to sensitivities around conducting research on the media. During the interviews, neither the name of the project nor the organizations were mentioned. ThirdEye was selected to conduct interviews based on the quality of its proposal and relevant experience. Data collection took place for six weeks in September 2022-October 2022, and it was conducted by computer assisted telephone interview (CATI). The data collection period was slightly longer than expected due to the challenges in recruiting respondents, especially in the ethnic areas.

- Limitations of the findings

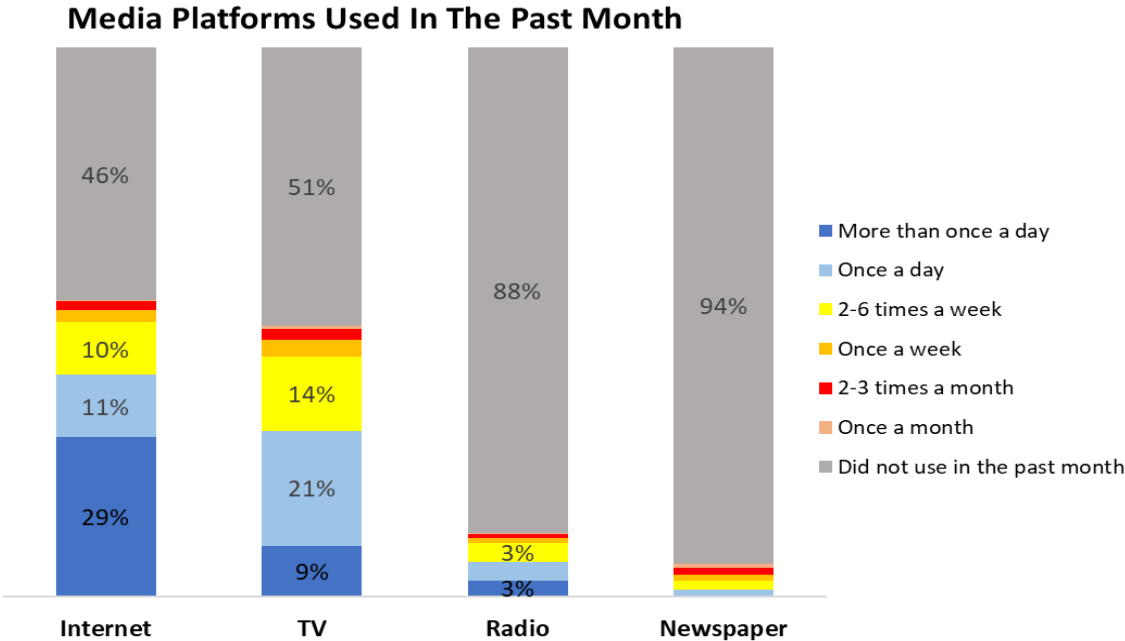
The national media audience survey aims to provide evidence on current media landscape and news and information needs. It will help media practitioners and relevant stakeholders design news programs that better reflect the needs and interests of the audience. While the survey can provide disaggregated data at the national level, such as gender, income, education, and ethnicity, it will be limited for analysis at the sub-national level since the sample size will become too small if broken down to the state/region level. It is recommended to use the data from the survey along with information from audience research that will be conducted at the local level by media partners to provide the full picture at both national and state/region levels.

FINDINGS

OVERALL MEDIA LANDSCAPE IN MYANMAR

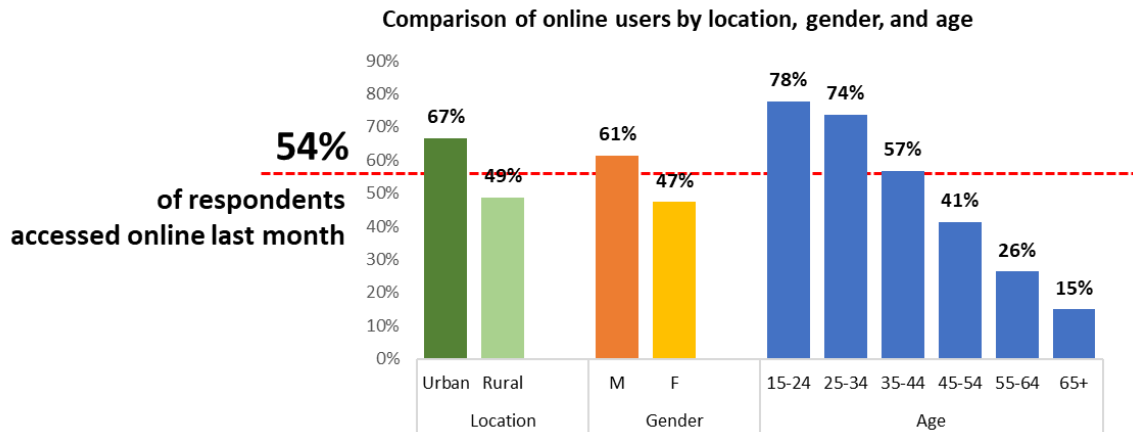
Media landscape in Myanmar has shifted more and more towards online platforms. It started during COVID-19 pandemic when people had to stay at home for an extended period and were required to rely on online platforms to communicate with the outside world. Print media is among the businesses that bore the brunt of the economic fallout of the pandemic. In the aftermath of the military coup, there is even higher reliance on online media as this is where independent media operate. TV and print media are no longer considered to be independent as they have to restrain from criticizing the military. There is an exception for TV with satellite dishes through which news programs from independent media can still be accessed.

MEDIA PLATFORMS USED IN THE PAST MONTH

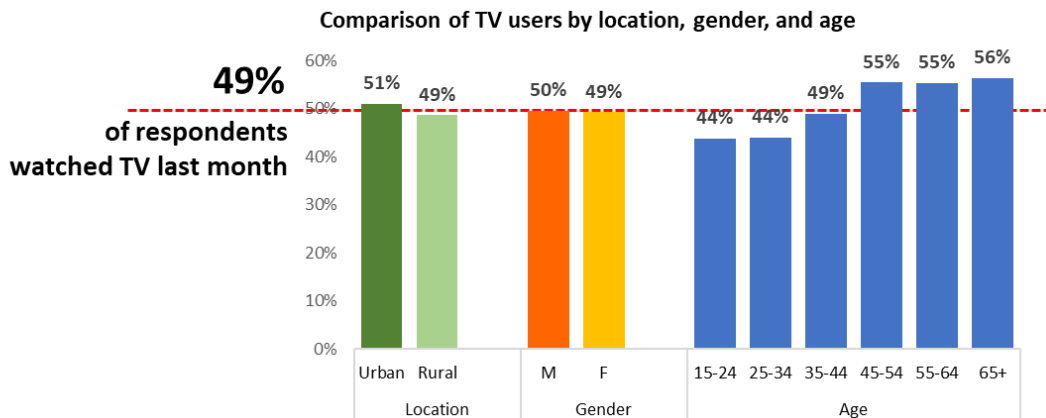


The survey findings show that the internet and TV (including TV with satellite dishes, antenna, and cable) are the two platforms that people use the most. Over the past month, 54% of respondents used the internet and 49% watched TV. Only 11% listened to the radio, and 6% read the newspaper in the past month. While state-owned newspapers are still being circulated, people no longer trust them. The use of smartphones is high with 83% of respondents using it every day in the past month. The patterns on the use of the internet and the use of social media are almost identical.

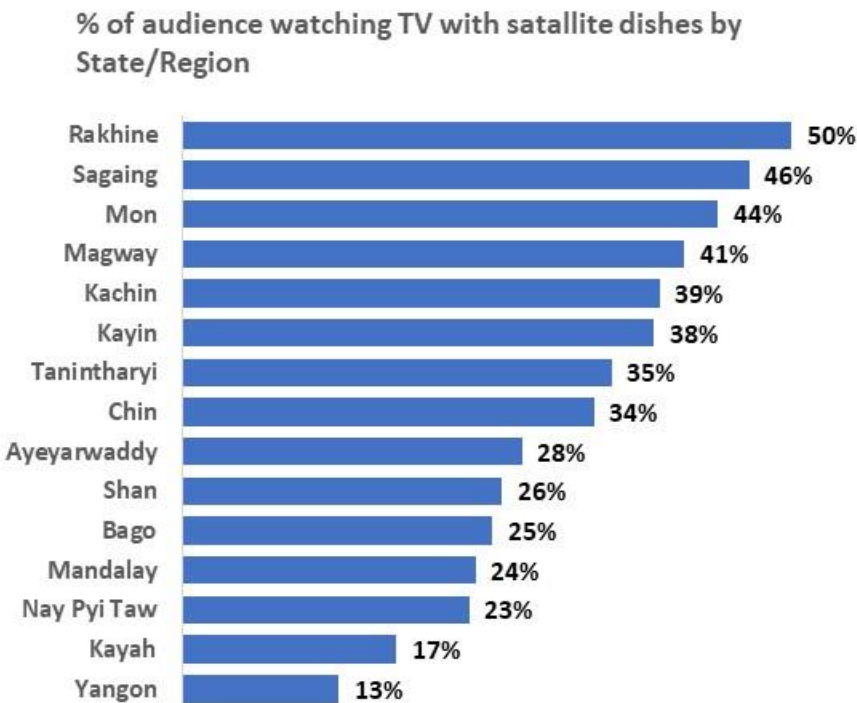
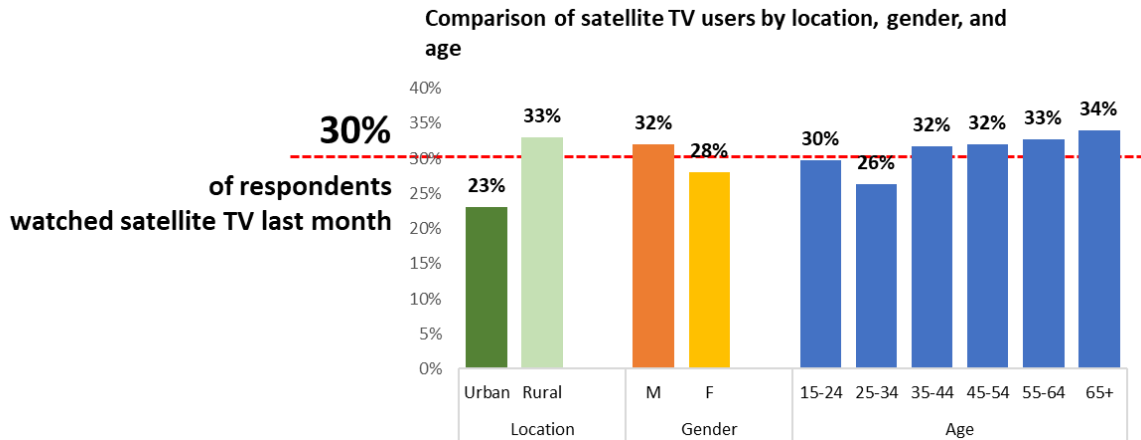
The majority of online users, 82%, use mobile data from their phones to access the internet. Internet usage is higher among people from urban areas, youth and middle-aged groups, and men.



There are 49% of respondents who watched TV in the past month. Comparisons by gender and location does not show any significant differences between men and women and urban and rural. However, comparison by age shows a higher rate of watching TV among older respondents.

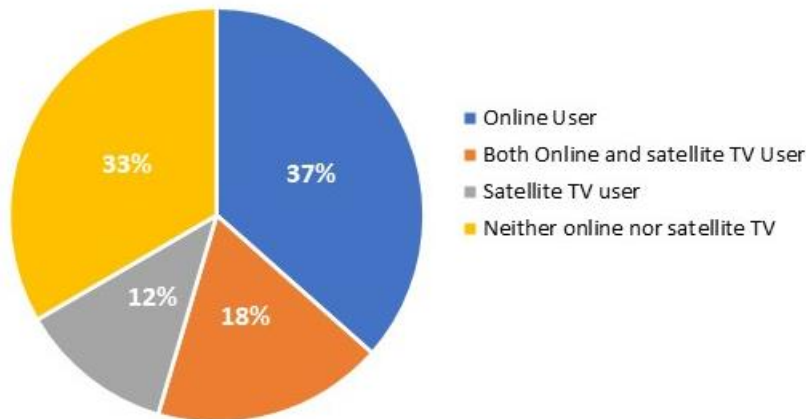


30% of respondents have watched TV channels via satellite dish over the past month. It is higher in rural areas with 33% of rural respondents watching TV via satellite dish compared to 23% in urban areas. There is also a higher use of satellite TV in conflict-affected areas.



Facebook tends to reach urban areas and a younger population more; TV with satellite dishes is a supplementary platform that can reach rural areas and an older population. It is also used in conflict-affected areas with internet cuts. With Facebook and satellite TV combined, there is potential to reach up to 67% of total users.

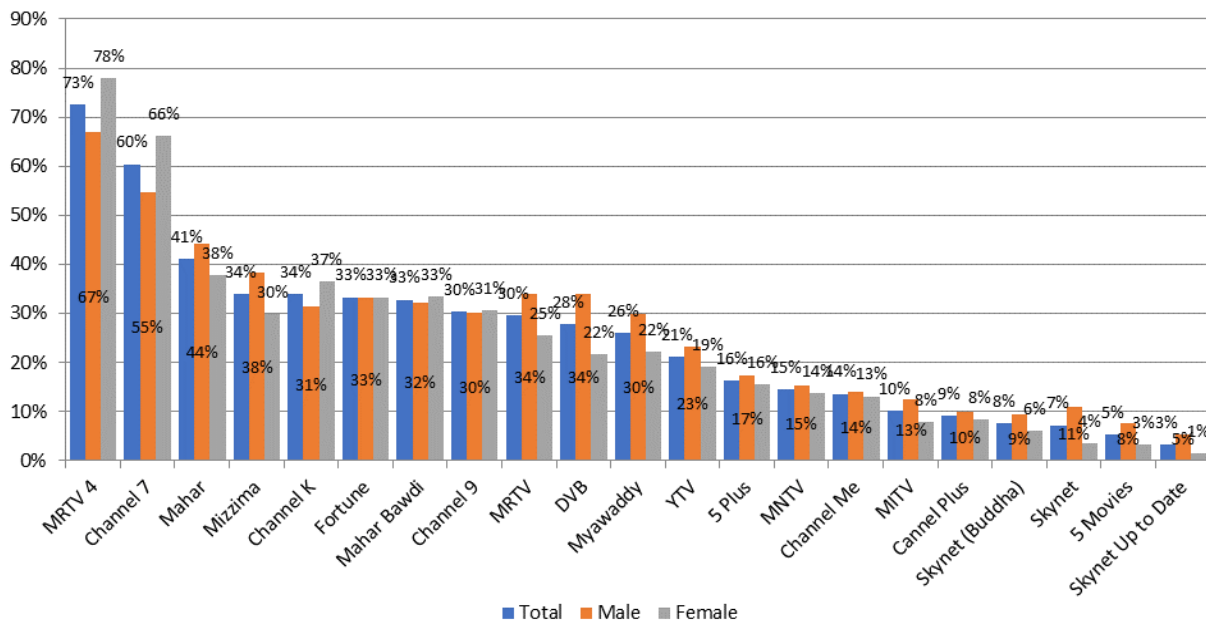
Potential Reach of Online and Satellite TV



The reach of entertainment channels on TV is over two times higher than news. Up to 73% of respondents watched entertainment channels on TV in the past week while 30% watched the news. Top entertainment channels are MRTV4, Channel 7 and Mahar. News channels being watched the most on TV are Mizzima, MRTV, DVB, and Myawaddy.

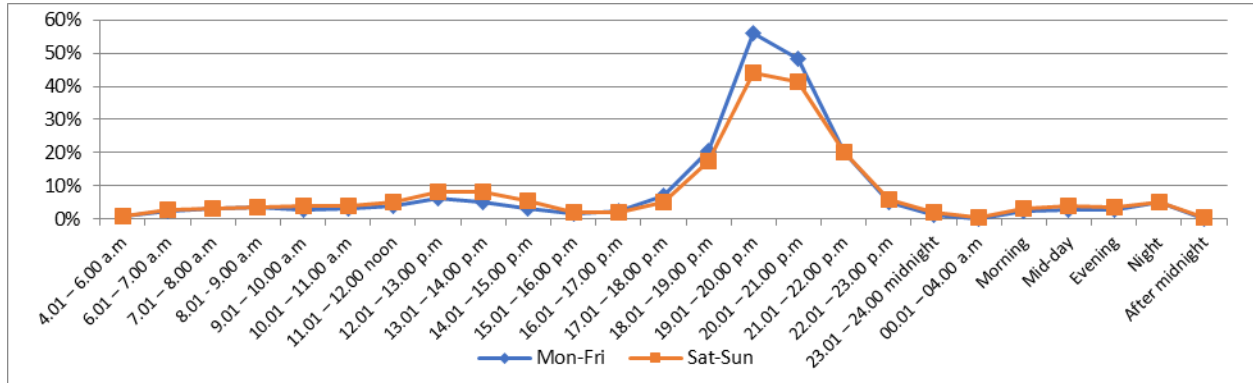
Women are more likely to prefer entertainment channels over news. Respondents from rural communities are more likely to watch TV than those from urban areas, possibly due to challenges in getting internet access.

TV Channels Watched in the Past Week

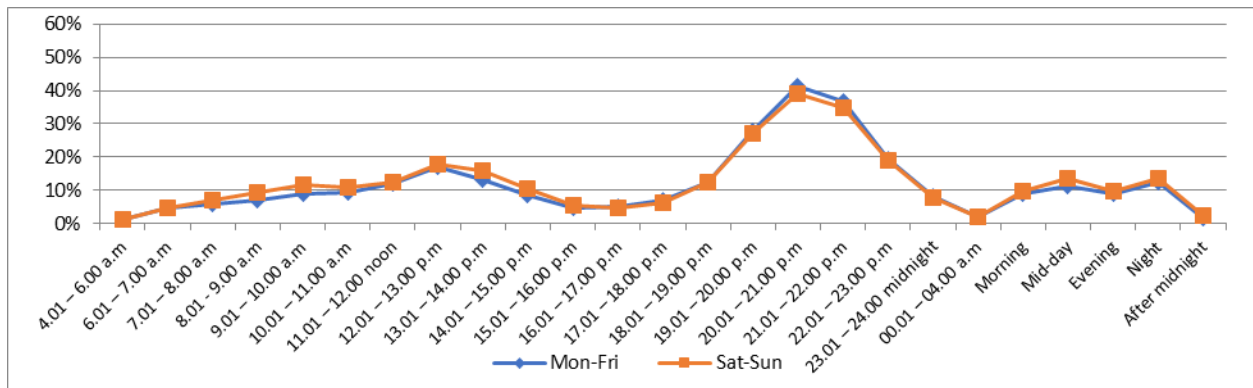


The peak time of watching TV and using the internet is 6 pm to 9 pm on both weekdays and weekends. Women are more likely to watch TV and use the internet during those peak times.

The time of watching TV during the day



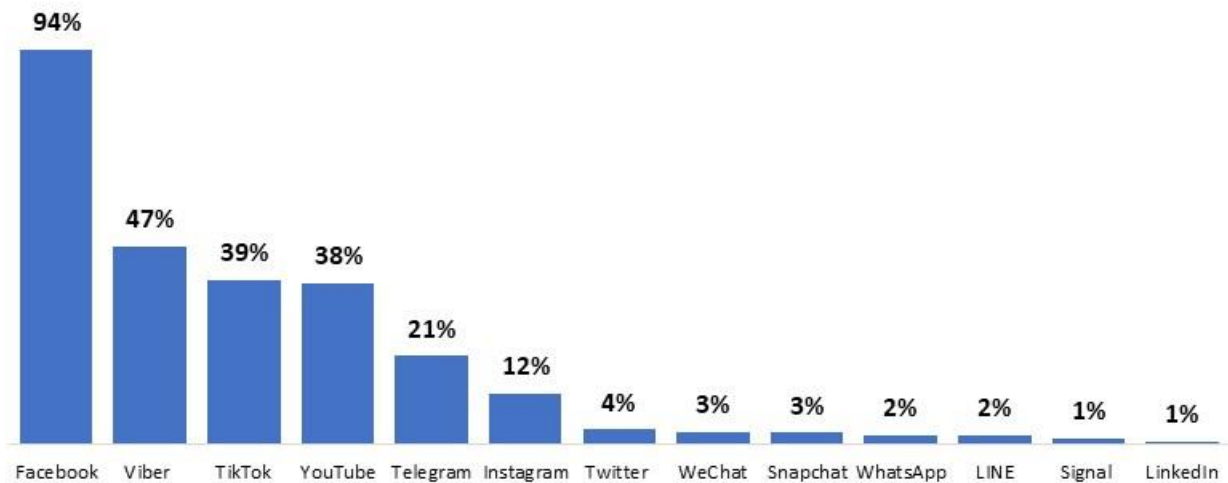
The time of using internet during the day



Social Media Platforms Used in the Past Month

Respondents prefer Facebook because they can communicate with friends and get the latest news at the same time. They mention a wide range of topics available on Facebook, including business, religion, technology, and football. Because of the requirement to use VPNs for Facebook, news agencies have started using Telegram, which has gained popularity. In the aftermath of the coup, the use of YouTube has declined due to increased mobile data costs according to the respondents from individual in-depth interviews. Viber is used for communications only, and TikTok is popular among youth.

Social Media Platforms Used In The Past Month

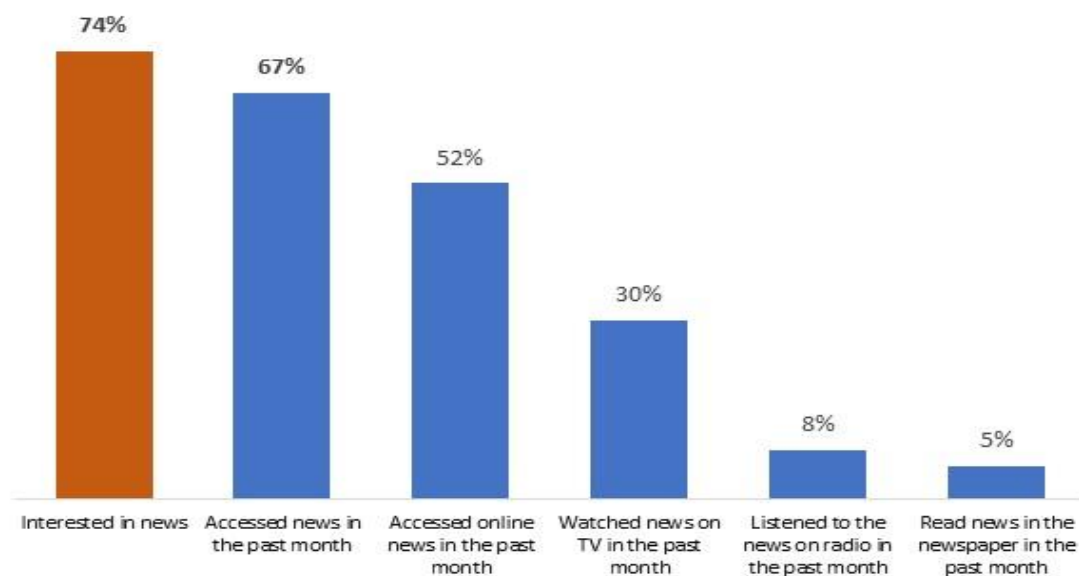


NEWS MEDIA LANDSCAPE IN MYANMAR

INTEREST IN THE NEWS AND PRACTICE OF FOLLOWING NEWS

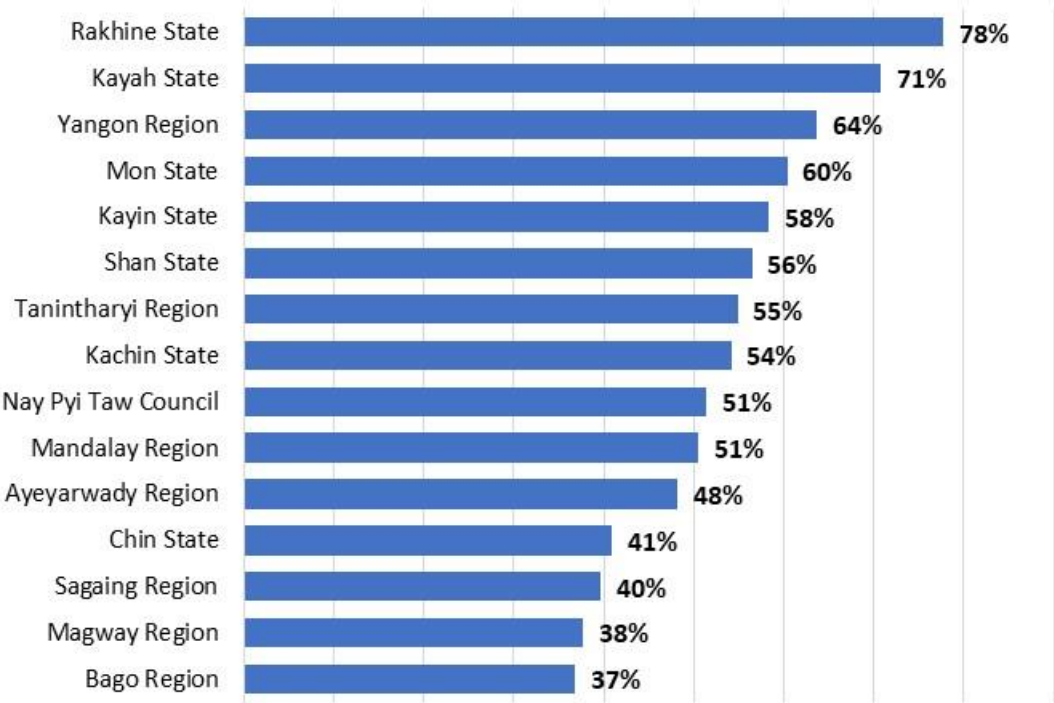
74% of the respondents said they are interested in the news, and 67% of respondents checked the news in the past month. Among them, 52% checked news on the internet, 30% watched news on TV, 8% listened to the news radio and 5% read the newspaper. The audience are most interested in national news which is followed by local and international news. The purpose of following the news is to get current updates on the political and economic crisis. A respondent puts, “Without news, we will be as good as blinds.”

Interest In The News and Practice of Accessing News



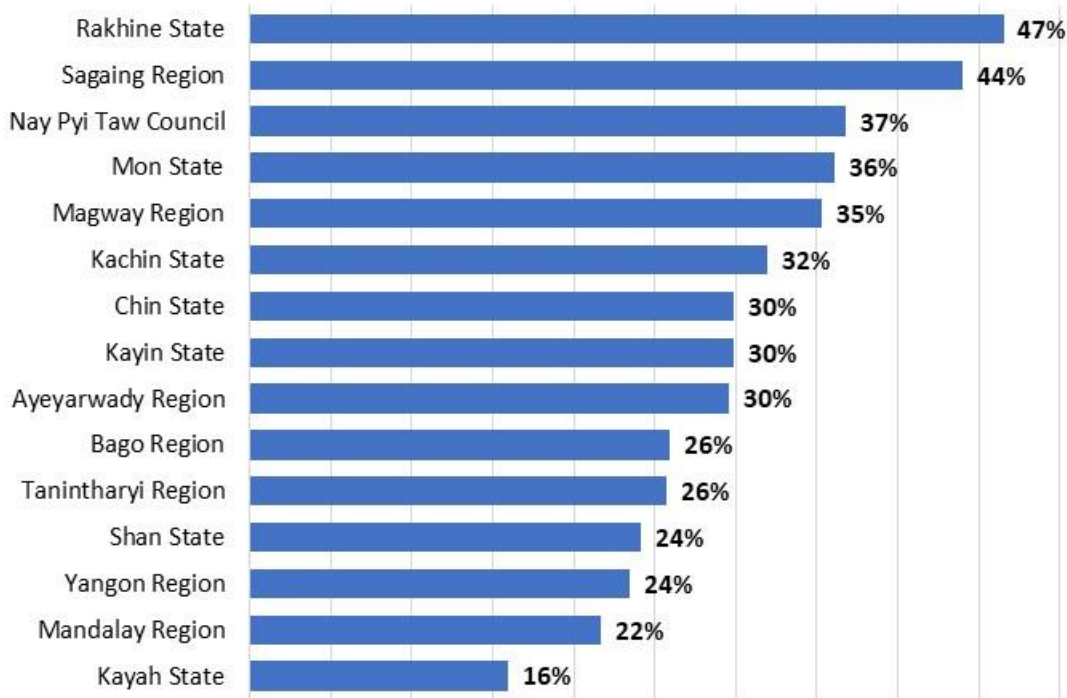
In terms of states and regions, conflict-affected areas are more likely to be active in following news. It is part of day-to-day activities for respondents from conflict-affected areas to check on the security situation such as military checkpoints and clashes to keep themselves safe. Rakhine is the most active state in following news from both online and TV¹. Other conflict-affected states, including Kayah, Mon, Kayin, Shan and Kachin, are also active in checking news online except for Chin state, where there are frequent internet cuts. Sagaing and Magway rely more on TV due to internet cuts. Nay Pyi Taw is among the top locations for following news from TV, newspaper, and radio -- possibly because of government staff getting updates from state-owned media. Among the regions, Yangon is the most active in following online news and Bago is the least active. Mandalay, Ayeyarwaddy and Tanintharyi are average in following news.

% of audience who access online news by State/Region

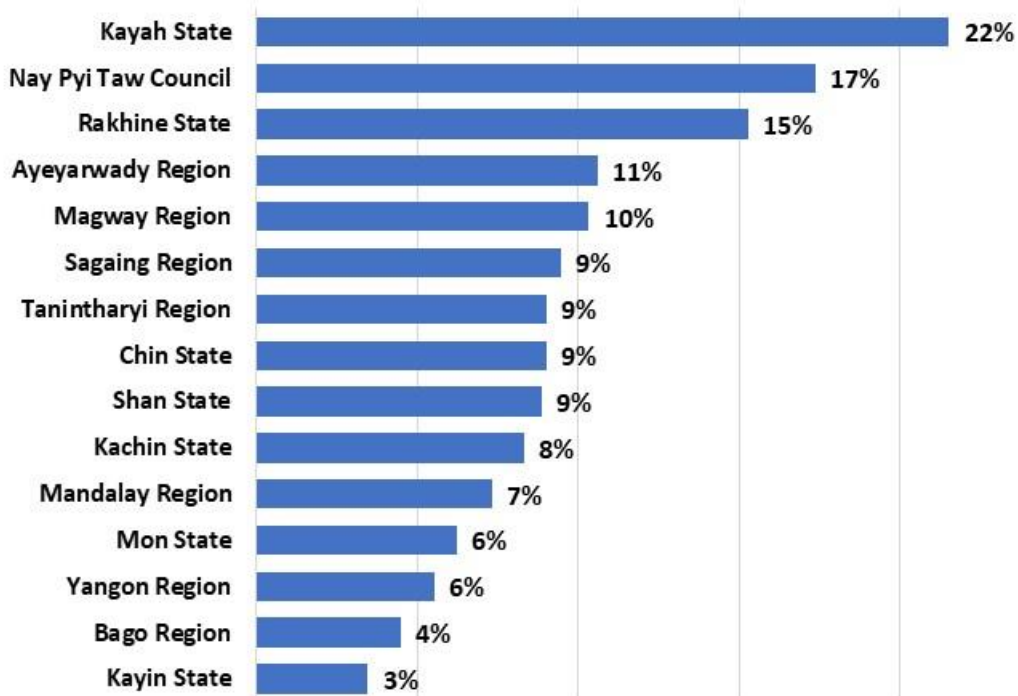


¹ Data collection period, September 2022-October 2022, coincided with the time of escalated tensions in Rakhine state.

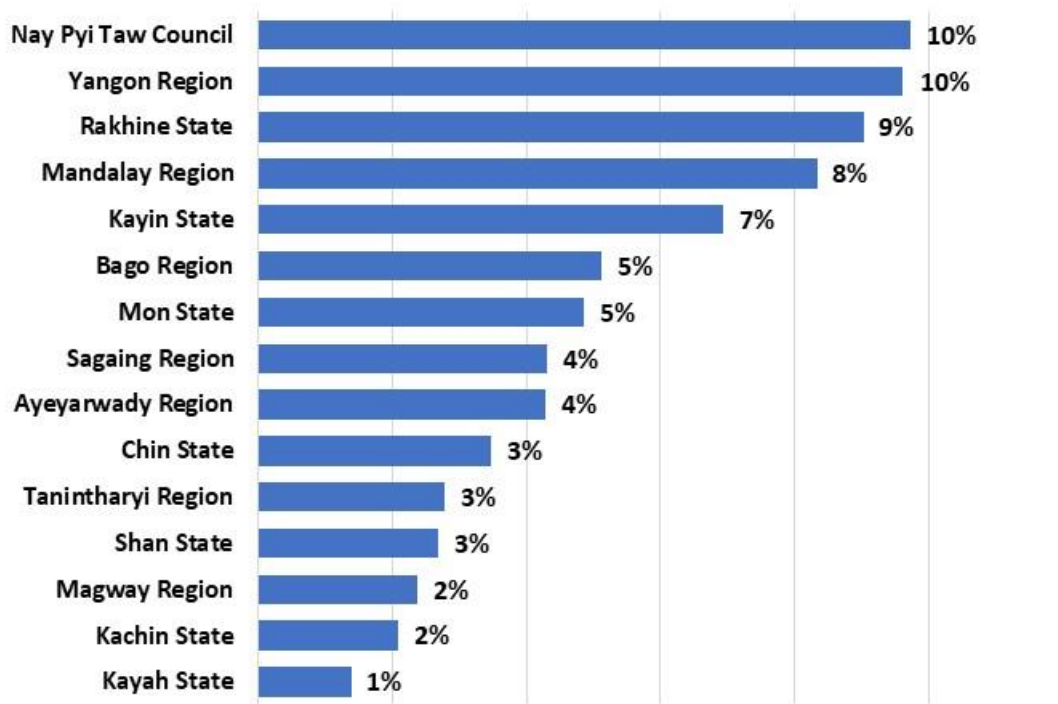
% of audience who watch news on TV by State/Region



% of audience who listen to radio news by State/Region



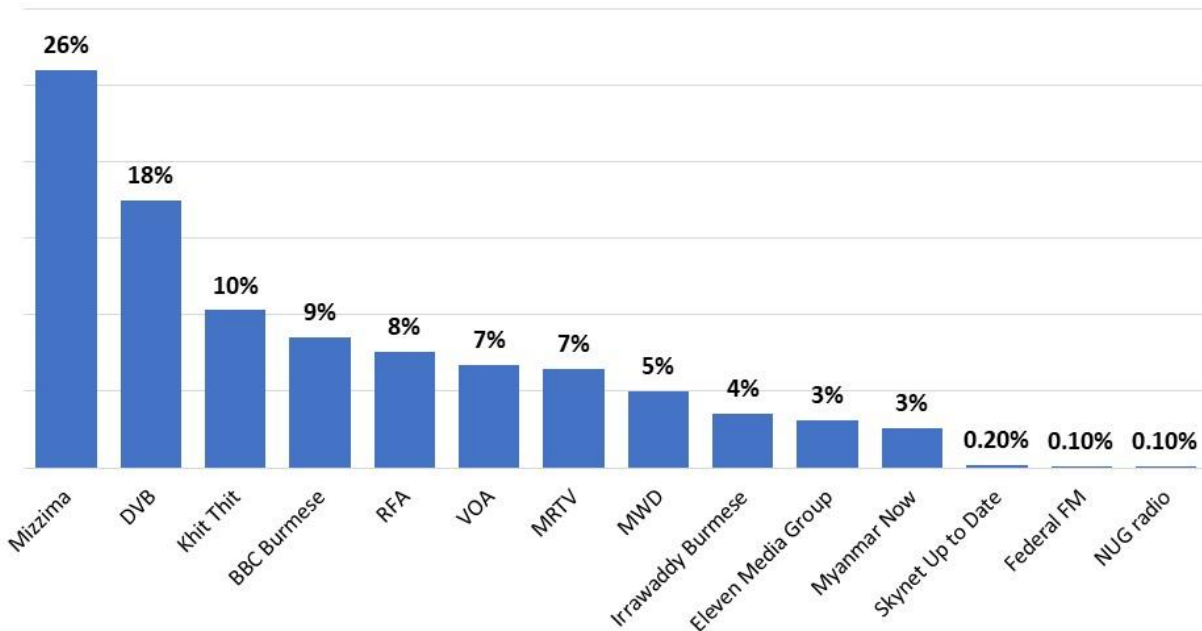
% of audience who read newspaper by State/Region



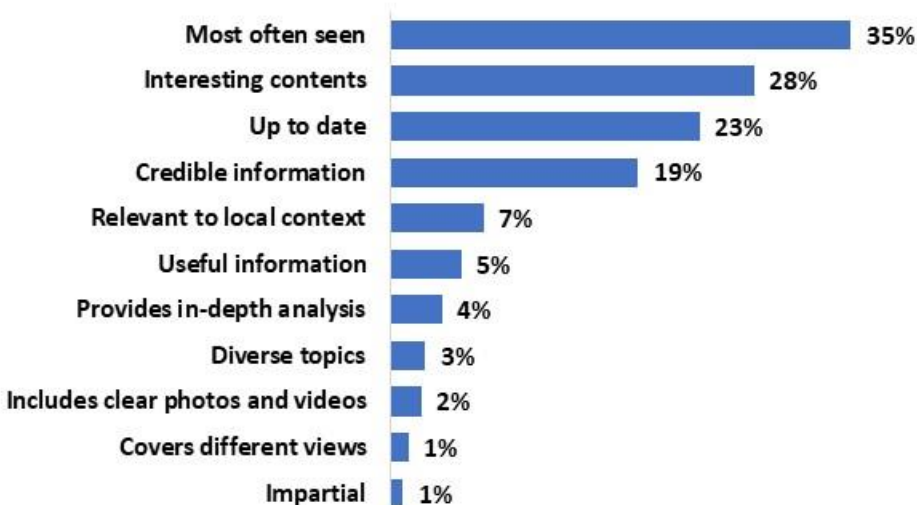
MOST FREQUENTLY ACCESSED NEWS AGENCIES

The top three news outlets respondents accessed the most were Mizzima (26%), DVB (18%) and Khit Thit (10%). Audiences are interested in getting quick updates of the latest news, and these three media are perceived to be the most visible, up-to-date, and interesting. Respondents made few references to the content of the news, such as level of details, diversity of views, and relevance to the local context. The audience understands that the media cannot make news stories too detailed for the sake of the safety of those who are linked with the news reports.

Media Agencies Accessed In The Past Month



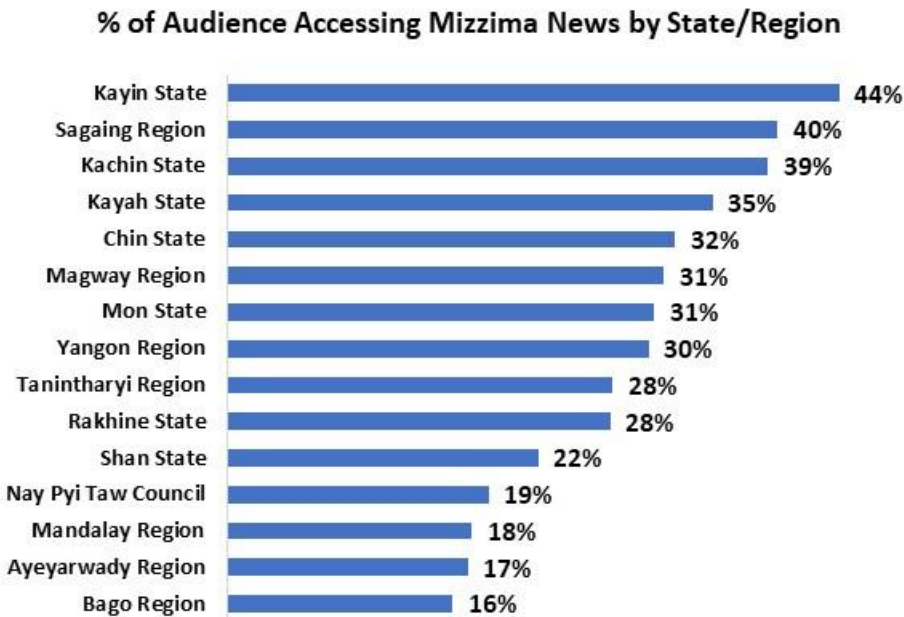
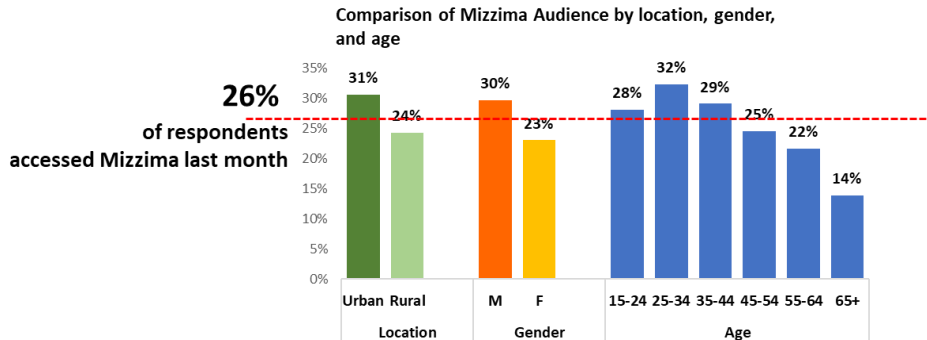
Reasons for accessing the media agency

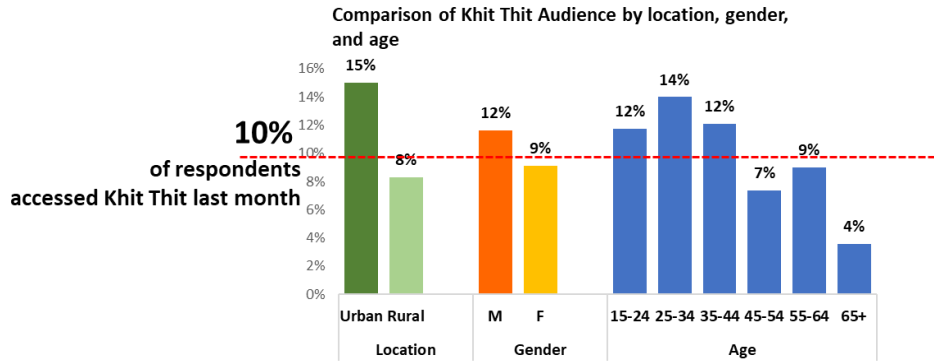


Respondents view that Mizzima has gained more popularity after the coup by providing political updates that resonate with the needs and interests of the audience. One of the respondents called Mizzima the “People’s Media,” recognizing the role of Mizzima as an independent media group in the current context. Audience also regards it as an established broadcasting station with multiple platforms. Those with interest in politics are more likely to be Mizzima’s audience, and they consider Mizzima’s news to reflect the real situation.

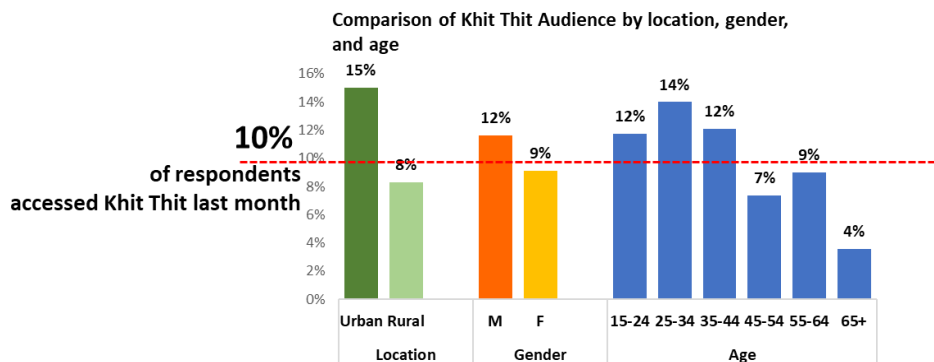
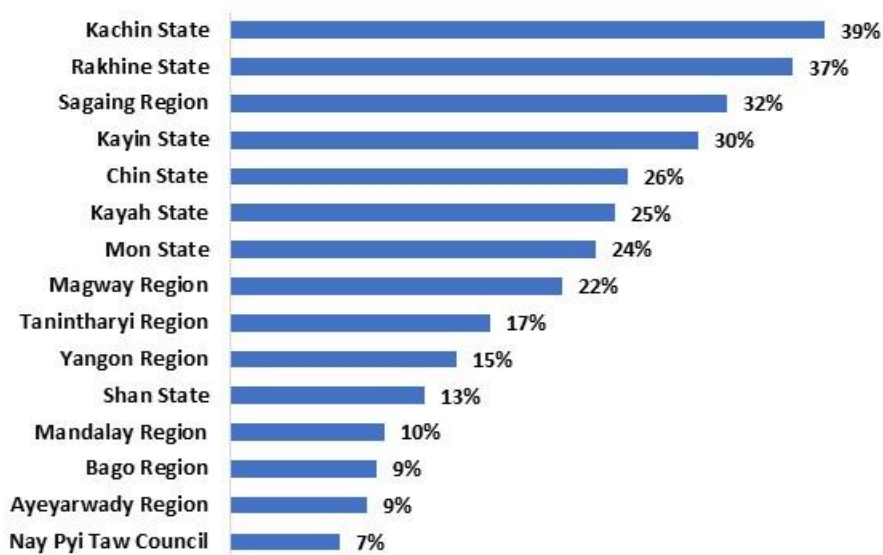
The highlights of audience analysis of the top three agencies are as follows:

- Mizzima and DVB are available on both social media and satellite TV, and Khit Thit is popular on Facebook.
- DVB is accessed equally in both urban and rural areas, while Mizzima and Khit Thit are more popular in urban areas.
- Across all three media, men are more likely to access news than women.
- Youth and middle age groups are more prominent among the audience.
- There is a higher level of media consumption in conflict-affected states.

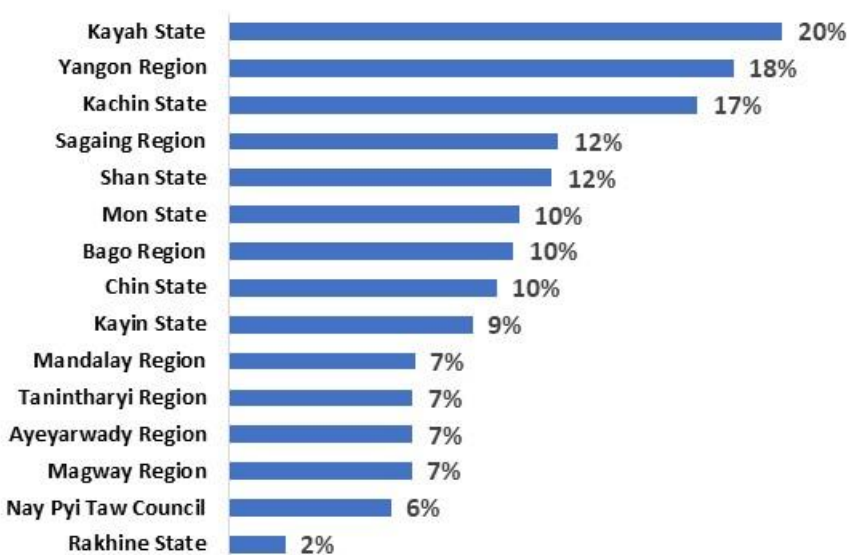




% of Audience Accessing DVB News by State/Region



% of Audience Accessing Khit Thit News by State/Region



Overall, the reach of independent media is significantly higher than that of state-owned media. The reach of MRTV and MWD news is low despite its nationwide coverage, indicating lack of interest from the audience. Respondents said they watch state-owned media on TV occasionally to get updates on the SAC. Irrawaddy Burmese and Myanmar Now appear to attract less audience than other independent media, due to being purely online or producing and posting fewer news stories than the most popular outlets. NUG radio and Federal FM still have minimal reach.

ONLINE NEWS MEDIA LANDSCAPE

Nine news media pages were accessed the most online, mainly via Facebook. Despite dissemination of news content on other social media platforms in the aftermath of the coup, Facebook remains the most preferred.

Online Media Pages Accessed in the Past Week

Sr.	Name of Media Outlet	% of respondents who have accessed in the past week	Platform Accessed			
			Facebook	YouTube	Twitter	Telegram
1	Mizzima	23%	21%	3%	0.2%	0.2%
2	DVB	15%	14%	2%	0.1%	0.1%
3	Khit Thit	15%	14%	1%	0.1%	0.2%
4	BBC Burmese	12%	12%	2%	0.1%	0.1%
5	RFA	10%	9%	2%	0.1%	0.2%
6	VOA	9%	8%	2%	0.1%	0.1%
7	Eleven News	8%	8%	1%	-	0.2%

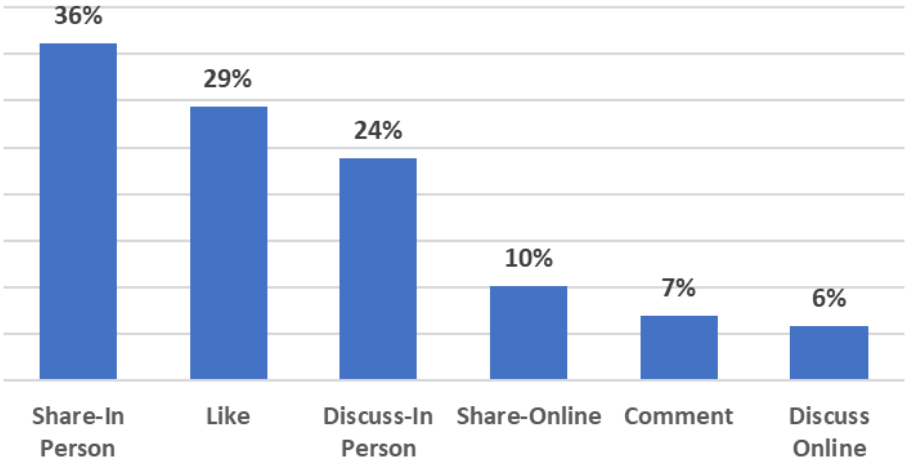
Sr.	Name of Media Outlet	% of respondents who have accessed in the past week	Platform Accessed			
			Facebook	YouTube	Twitter	Telegram
8	Irrawaddy Burmese	8%	7%	1%	-	0.2%
9	Myanmar Now	6%	6%	1%	-	0.1%

DIGITAL SECURITY AND ENGAGEMENT ON ONLINE NEWS

49% of Facebook users are now capable of using VPN by themselves even though it was quite challenging in the beginning. Other aspects of digital security are not widely practiced. Only 20% of respondents have locked their profile, and 21% kept their personal information, such as phone number, private in their accounts. There is a higher level of digital literacy among younger users, and they are more likely to engage with news posts as their accounts are protected.

The most common practices of respondents after seeing news online are sharing and discussing the contents offline with friends and family members. Due to security concerns, respondents are less likely to share, make a comment or discuss in online communities even though they are still likely to react with a “Like” to the posts. Audiences are not likely to set “see first” on news pages, either, due to limited awareness or security risks.

Level of engagement on the news
Q: Which of the followings did you do in the past month?



NEWS TOPICS TO COVER MORE

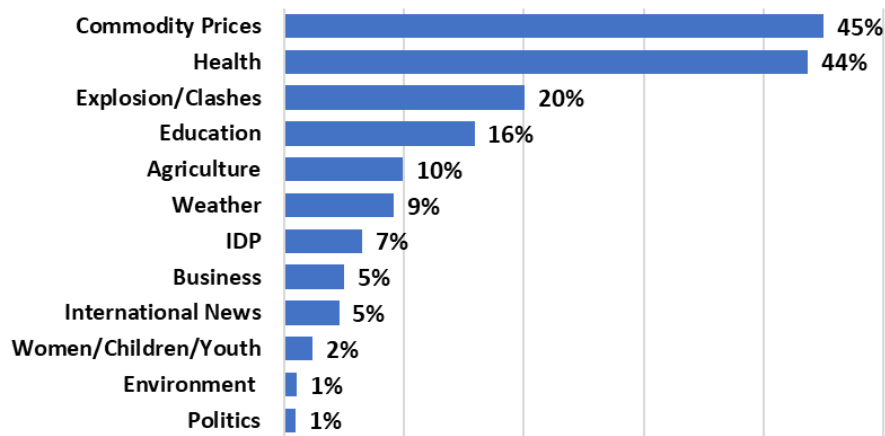
Up to 78% of respondents perceive that the news provided by the media meets their needs and is sufficient. While they reckon that political news will be the priority as long as the political situation remains

unresolved, the respondents wish to receive additional information on commodity prices, health, and explosion/clashes, reflecting the current concerns over inflation, COVID-19, and security. The need to receive commodity price and health information is the most significant. There is a higher demand from rural respondents to receive more information on agricultural and weather news. “Politics” ranks the lowest due to the reluctance of the respondents to mention it. Findings from individual in-depth interviews show that while respondents wish to see political news as it is, they would like to get more updates on the socio-economic and women and girls related news.

Information from in-depth interviews show that while it is not a priority issue for most of the respondents, they still consider women and girls related issues an important topic for the media to cover more.

News Topics for Media To Cover More

Q:What are three topics of news that you would like the media to report more?



Challenges In Accessing Internet

Due to the increased cost of mobile data, 55% of respondents had to reduce the time of using the internet. A respondent said an internet package that costs MMK 1,000 used to last three days but now it lasts for only one day. It also affects the use of video platforms such as YouTube. Other issues affecting the use of the internet are power outages, longer hours at work, security concerns, and lower level of household incomes.

Willingness To Pay for News

Most of the audience, 99%, had not paid for news in the past while 50% of participants from individual in-depth interviews indicated their willingness to pay if the amount is affordable, within the range of MMK 1,000-5,000 per month, and if it includes the service of getting access to the latest news. Regular audiences of Mizzima, DVB, and Khit This are more willing to pay for news. On the other hand, there are audiences who are not in favor of paying for news as they already have to pay more for mobile data.

CONCLUSION

The research findings show that there is high demand for and interest in the news. One of the reasons in following news is to get current updates related to political and economic crises. Overall, there is a positive response from the audience that the news meets their needs and interests, and the audience recognizes the effort made by the media to continue providing news updates amid the risks and challenges. Three characteristics of the most accessed news agencies are that they are highly visible, quick to provide news updates, and provide interesting content. Conflict-affected areas are more active in following news, especially for security updates. One of the top three topics the audience would like to see more coverage about is security updates, including clashes and explosions.

Over the past two years, news media platforms have shifted away from newspapers, radio, and TV to online platforms due to the impact from COVID-19 and the coup. It creates challenges for those who are accustomed to traditional media and not familiar with technology.

There are both pros and cons to online platforms. While they can reach as many as 20 million social media users in Myanmar, primarily via Facebook, many lack access to the internet. Currently, there are internet cuts in 23 townships of Myanmar, depriving an estimated 1.5 million internet users of access. In addition, much of the audience is less likely to engage with online news posts than they would normally do so on other posts due to security concerns. Only younger audiences are more likely to engage as they have a higher level of digital skills to secure their accounts. Increased mobile data costs reduce the time people use the internet, including accessing news online.

Still, respondents prefer Facebook as it is the most informative social media platform. They are now capable of using VPNs to access Facebook and know how to search and download VPN applications. They are not familiar with other platforms such as Telegram, which has become more popular in the aftermath of the coup. While there is a mix of authentic and fake news on Facebook, most respondents are able to distinguish them and use their own judgment on the credibility of information. There is a practice of searching by using the name of the trusted media when the audience seeks news and information on Facebook. If needed, they verify the news with friends or relatives from the area where the news has occurred.

Facebook tends to reach more to urban areas and younger population; TV with satellite dishes is a supplementary platform that can reach rural areas and an older population. It is also used in conflict-affected areas with frequent internet cuts. With Facebook and satellite TV combined, there is potential to reach 67% of total users.

Facebook users are more likely to get news and information from as many sources as possible rather than selected sources. There is also a variety of content, such as posts from friends and other topics of interest that can account for as much 80% of total content accessed. This means news media outlets compete not only with each other but also with other content to get the audience's attention. Mainstream media on Facebook do not attract as much attention as they should, possibly due to the plethora of content.

The most popular news agency is Mizzima. It became more popular after the coup by providing political updates that resonate with the needs and interests of the audience. One of Mizzima's advantages is that it is able to reach audiences from numerous multi-media platforms. DVB and Khit Thit are the other two

media accessed the most. Similar to Mizzima, DVB is available both online and on satellite TV. Khit Thit is online-based but produces a substantial number of posts and responds quickly to breaking news.

Audiences can cope with the over-representation of political news as long as it does not overshadow other topics of interest. The top three topics that the audience wishes to see more of are commodity prices, COVID-19, and security updates. Given the chaos in the markets, it is more difficult to keep track of the fluctuations in commodity prices. Since the coup, the COVID-19 information center of the Ministry of Health has become defunct and stopped providing updated information on the number of cases. Rising levels of tension and violence, especially in the conflict-affected areas, impose security risks on civilians. Audiences need to remain informed about those issues and wish to receive more information.

Audiences consider that there is 50/50 media freedom with both the SAC and independent media being able to keep the news operating. While audiences access news from independent media more frequently, they occasionally check SAC news to remain updated on its plans. In the context of a political crisis that is likely to escalate, audiences would like to get news updates in real time with reliable information to keep abreast of the situation. The message from the audience to the independent media: "Provide news with the highest level of accuracy and as fast as possible and be bold in standing up for truth without any bias."

RECOMMENDATIONS

Based on the findings, the following recommendations are made for independent media to consider.

Expand the reach of news and information to rural and conflict-affected areas where the internet is not available.

While audiences in urban areas can readily access news and information from the internet, communities from rural and conflict-affected areas need to rely on TV with satellite dishes. Despite security risks and challenges such as disrupted electricity supplies to use satellite TV, there is still a notable use of satellite TV to access news in rural and conflict-affected areas. Independent media already on satellite TV should expand and diversify their news programs, prioritize locally relevant news topics, and extend the duration and frequency of news programs to maximize access to news from communities in rural and conflict-affected areas.

Increase focus on security updates for conflict-affected areas.

The most important information needed by the audience in conflict-affected areas, either from online or satellite TV, is security updates to avoid the risk of being arrested by security forces or caught in conflict. This is a critical need and can benefit the audience through sharing information to those who need it most. Increasing the focus on security updates for conflict-affected areas can benefit the audience and create a significant impact on their lives.

Create content for the topics suggested by the audience, including health, commodity prices and security.

In addition to news updates, the audience wishes to receive more information concerning health, commodity prices and security. There are information gaps on COVID-19 and challenges in keeping track of fast-changing commodity prices amid the ongoing economic crisis. People are vigilant in monitoring the security situation, including explosions and clashes in major cities that are usually followed by tightened

security and inspections. Increased coverage on those topics by the news media will better meet the needs of the audience.

Mainstream gender issues to attract more interest from women and girls

Women and girls are less likely to access news than men. Contents related to women and girls' issues are needed. Topics targeting women and girls should also be expanded across media platforms. Key topics to consider are gender equality, violence against women and girls, livelihood, healthcare, and human trafficking. Scheduling the contents at the time when women are online or watch TV can also create effective reach of news and information to women and girls.