THE BUSINESS OF CHIN MEDIA

News Audiences Challenges Survival

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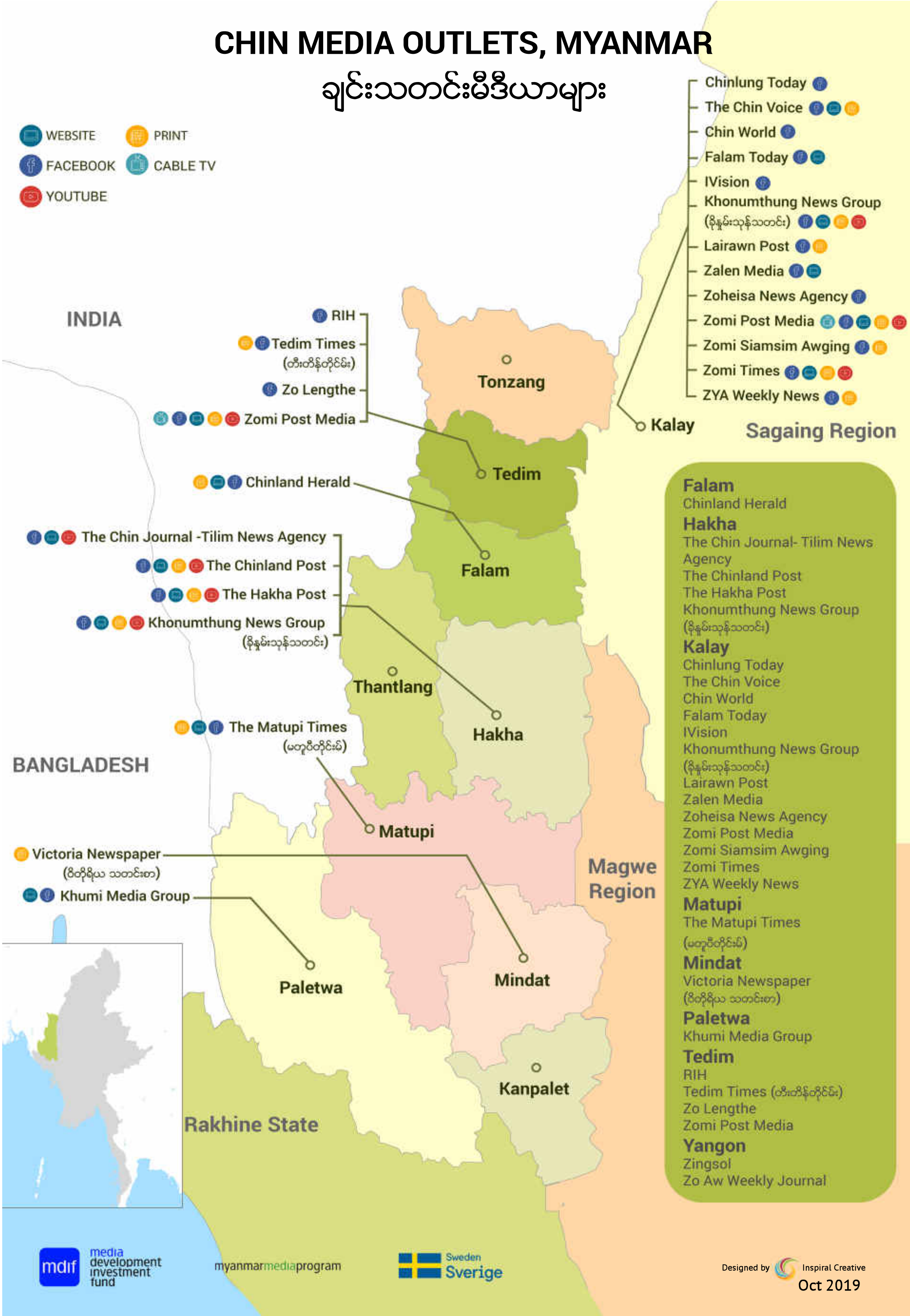

Note: Please click here to see MDIF's interactive digital Chin media map.

INTRODUCTION

by **Tessa Piper**
MDIF Program Director for South East Asia

THIS report analyses the Chin media sector. It is based on research conducted by MDIF from late 2018 through December 2019, as well as a quantitative and qualitative survey conducted by Myanmar Survey Research (MSR) in May 2019. The report provides data on the Chin media operations themselves, as well as the news and information needs and preferences of their actual and potential audiences in Chin State and Sagaing Region.

In MDIF's November 2018 publication, *An Unfavorable Business: Running Local Media in Myanmar's Ethnic States and Regions*, we examined the enormous internal and external obstacles that local media across the country are facing to survive. A central conclusion of our research was that local media are operating in a business environment that is heavily weighted against their prospects for sustainability and, consequently, their existence.

MDIF's latest research shows that there are currently 25 private Chin media outlets operating in Myanmar. Representing close to 40% of all local media in Myanmar's ethnic states and regions, this makes them an anomaly. And their high number seems illogical. Why would so many people choose to set up outlets targeting ethnic minority audiences in one of the most impoverished states in the country, with the lowest consumption rates, and lowest population density? Why would 14 of them opt to produce print publications when their audiences are scattered across a mountainous region with few transport links and very limited infrastructure? And why would 21 of the outlets that are currently operating compound these multiple challenges by choosing to produce content in Chin languages that further restrict their potential audiences?

Why would so many people choose to set up outlets targeting ethnic minority audiences in the most impoverished state in the country, with the lowest consumption rates, and lowest population density?

We want to understand the answers to these questions, as well as who is running these media and how, and which resources they have at their disposal.

Another major series of questions relates to news and information access, usage, trust, preferences, and flows in Chin State and Kalay, Sagaing Region, where Chin media outlets' audiences are primarily based.

MDIF's goal in conducting this research has been to better comprehend the role these media are playing in meeting the news and information needs of their audiences, as well as to more clearly understand the reality of running a Chin media operation.

What we have found is that, in many respects, Chin media face very similar problems to their counterparts elsewhere in Myanmar. They have often been set up by individuals who are deeply committed to serving the information needs of their communities, and they are often an important source of information for their audiences.

We also have found that Chin media are dealing with challenges managing the digital transition that are similar to both their national and local media counterparts, and that more than half of them are also simultaneously continuing to produce print publications that remain a valuable news source for local communities.

Chin media are facing a major struggle to survive financially.

And, like local media all over the country, MDIF's research has confirmed that Chin media are facing a major struggle to survive financially, often having to rely on local donors and personal savings as well as more traditional revenue sources such as advertising and print copy sales. At the time of founding these media, their business potential was generally not a major consideration. They have thus largely been obliged to learn the realities of running a media business by doing, with no external advice or support at hand.

Chin media also have to deal with a problem common to all media in Myanmar, but particularly among outlets based in more remote locations, namely limited access to skilled human resources. But while media in other parts of the country have

Dawei Watch founding Chief Editor Myo Aung coaching Chin editors as part of MDIF's basic sales training for Chin media in Kalay, Sagaing Region (May 2019)

> **Most Chin media have had comparatively little access to capacity-building of any kind, and next to none focused on building their business skills.**

had at least occasional opportunities to participate in programs to develop the skills of their teams, most Chin media have had comparatively little access to capacity-building of any kind, and next to none focused on building their business skills.

Our research confirms the value of the work being done by Chin media to provide their audiences with access to information, and the additional benefit of supporting ethnic language preservation. As such, we have incorporated work with Chin media into our current 3.5 year business capacity building Myanmar Media Program. In this way we are aiming to help improve their ability to serve their audiences with the news and information they need, while also increasing their prospects for financial survival in what has been, and will continue to be, a very difficult business environment.

Since late 2015, MDIF has been running an intensive business capacity-building program for media in Myanmar, Myanmar Media Program (MMP), supported by Sida. Phase 2 of this program began in July 2019. Click on this Myanmar Media Program link for further details of our work in Myanmar.

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CHIN MEDIA, THE MARKET, AND MYANMAR'S POLITICAL OPENING

by **Jane Madlyn McElhone**
Director of MDIF's Myanmar Media Program

EIGHT years into Myanmar's political transition, Chin State remains one of the poorest and least populated administrative areas in the country, with a population of approximately half a million.

Its challenges are myriad: economic stagnation, sluggish and controversial development projects, insufficient resources and infrastructure, and geographic isolation, exacerbated by treacherous mountainous roads and natural disasters. According to Myanmar's Ministry of Electricity and and Energy, fewer than a quarter of the households in Chin State have electricity, and those that do are limited to three townships - Hakha, Falam and Mindat. Since 2018, when the UN informed an estimated 35,000 Chin refugees living in India and Malaysia that they no longer needed protection and that Chin State was now stable and secure, it is also facing the potential return of its displaced civilians.

In March 2019, at the Chin State Investment Fair in Yangon, Chief Minister Salai Lian Luai listed hotels and tourism, agriculture, mining, infrastructure, and hydropower and energy, as the state's top priorities. In light of flagging foreign investment, the Chin State Investment Fair was part of the Myanmar government's efforts to prop up the country's economy through the promotion of trade and investment, and the linking of local businesses with local and foreign investors.

Peace and conflict

UNLIKE the other ethnic states, for a long time Chin State was considered relatively peaceful, sheltered from much of the ongoing and, in some cases, increasing conflict between the Tatmadaw (army) and ethnic armed organisations. That is now changing.

Over the past three years, fighting between the Tatmadaw and the Arakan Army (an ethnic Rakhine armed organisation) has spilled over the border into Chin State's southern township, Paletwa. Civilians have been killed, and thousands of people have been displaced, fleeing Myanmar to settle on the Indian-Bangladeshi border or in India.

On 21 June 2019 the Myanmar government ordered an internet shutdown in nine townships in Rakhine State, and in Chin State's Paletwa Township, using Section 77 of the 2013 Telecommunications Law. In a joint statement, the Myanmar Center for Responsible Business, Myanmar ICT for Development Organization, Free Expression Myanmar, and Phandeeyar community tech hub condemned what it called "a watershed moment for Myanmar's digital development". On 2 September, internet was restored in Paletwa Township and in five of the nine affected townships in Rakhine State. As the time of writing, the shut-down in the remaining four townships in Rakhine State was on-going.

Chin Media Landscape

IN December 2018 MDIF published a report and mapping of 55 local media outlets called *An Unfavorable Business: Running Local Media in Myanmar's Ethnic States and Regions*. Of these, 38 did not exist until 2011. Before that time, ethnic media outlets were effectively banned inside Myanmar, and so operated in the borderlands of Thailand, India, and Bangladesh, as well as overseas.

An estimated 30-40% of Myanmar's total population lives in the ethnic states, as well as in six self-administered areas; an estimated 50 media outlets currently operate in these seven states, the majority serving specific ethnic nationalities. Most of these states have no more than a handful of media serving their populations and, while Shan State has the second largest number, 10, it is media serving Chin audiences that dominate, with 25 media operating as of the time of this writing. Of these, 10 are based in Chin State itself, and 13 in neighbouring Sagaing Region, with offices in Kalay, near the Chin State border. These latter outlets are located on the other side of the Chin State border for geographical convenience, and to take advantage of better telecommunications and other services. Two additional outlets are based in the capital Yangon. And while the number of these outlets is constantly in flux, that so many have been launched and continue to operate in one of the country's least populated and poorest states makes Chin State an anomaly.

> **Less than half of the population still cannot access wifi, and in more remote areas, mobile services.**

To some extent, the prevalence of Chin local media is a response to the state's geographic isolation and lack of infrastructure which means that the distribution of national print media - that might otherwise be a more widespread

Chin media interviewing a local strawberry farmer in Tedim Township (December 2018)

information source – is comparatively limited. As well, although telecommunications in Chin State have significantly improved since 2017 in the main centers, according to Chin digital specialist Michael Suantak, less than half of the population still cannot access wifi, and in more remote areas, mobile services. This assertion is supported by the 2017 Myanmar Living Conditions Survey which cites phone ownership to be at its lowest in rural areas and in Chin and Rakhine States. A second key factor is Chin State's linguistic and ethnic diversity, coupled with a history of missionary engagement, that has helped to preserve multiple Chin languages.

The combination of these two realities ensures there is a demand for local media outlets that can provide the Chin population with timely news in their preferred ethnic languages. The majority are either solely digital, or a mix of print and digital – with half only on Facebook and the other half with their own websites in addition to Facebook - or else are basic print publications, often of just two or four pages. Yet they all endeavour to fill an information gap in this remote, mountainous state, albeit within limited means.

Participants at MDIF's Chin media sales workshop, Kalay, Sagaing Region, May 2019

"Most Chin media do not have a proper strategic plan which has a negative impact on operations. We have difficulty retaining employees. There is no skilled labour. Once staff members gain some experience, they often leave in search of higher paying jobs."

Key Challenges Facing Chin Media

MDIF's 2018 local media business report outlined the enormous challenges to survival facing local media all over the country, and the various ways in which their economic survival is under threat. The report detailed three main factors that inhibit their development: uneven advertising market development; continuing government domination of the media sector; and an uneven digital media transition.

Like local media elsewhere in the country, Chin media outlets face all these challenges too, but in some cases more acutely. As a consequence, the survival of the media serving Chin audiences is highly precarious.

Shooting an NRC program about Chin ethnic groups in Mindat, the capital of southern Chin State

> **For the most part, Chin media run modest, often shoestring, operations, with uncertain income streams.**

For the most part, Chin media run modest, often shoestring, operations, with uncertain income streams. For those media producing print publications, the two sources of revenue that traditionally comprise the vast majority of their income, copy sales and advertising, have particular difficulties associated with them. With respect to copy sales, the geography of Chin State makes distribution particularly difficult, as the example of the Hakha language outlet The Hakha Post exemplifies. Until improved internet access enabled The Hakha Post to send soft PDF copies of its five day a week publication to other towns, it took five days for each edition to reach Tedim and two weeks to get to Matupi. While today they send soft copies in PDF to several locations to be printed locally, the disbursed nature of the Hakha-speaking population means that it is difficult to run a cost-effective operation.

Once print publications reach their audiences, Chin media outlets have to contend with two additional barriers: the audience's ability to pay and payment collection. In one of the poorest of Myanmar's 14 states and regions – where the World Bank classifies 58% of the population as poor - disposable income is understandably very limited. As well, distributors are often doing this work as a sideline occupation and are widely scattered around rural and urban locations, often selling small numbers of publications, with limited ability to send modest amounts of money back to the outlet.

Participants at MDIF's Chin media sales workshop, Kalay, Sagaing Region, May 2019

"Everything about print is a challenge. Printing, distribution, cash collection. Many of us print our newspapers and journals in-house or send our files to local businesses in our communities, or to other cities like Kalay or Mandalay. That takes a lot of time and is very costly. And we have very harsh weather, especially during the rainy season, and bad roads, so we can't distribute on time. Many of us also don't have dedicated staff for distribution and cash collection. And we have trouble collecting cash from distributors and sales people. On top of that, Chin audiences now seem more interested in online content."

Community radio volunteers at Heisa FM online radio station in Tedim Township recording radio dramas

Private Chin outlets also face competition from highly subsidised print and broadcast state-owned media, including the National Races Channel (NRC) with offices in Falam and Mindat in Chin State and tv programming in two Chin languages, as well as MRTV's radio services which also offer local language programs. In addition, the Chin State government distributes 3000 copies of its monthly publication Taungzalat Times, including to every local government office.

In the private sector there are also small cable TV initiatives sanctioned by local authorities (which locals say are more popular than the NRC, and which they can access for free), and online community radio stations in Tedim, Mindat and Falam.

Chin media also find it challenging to secure advertising, the other main revenue stream for print media. Like other local media in the ethnic state and regions, they grapple with the hard reality that local businesses are often reluctant to advertise, either because they are unconvinced of its value or because they worry about the potential negative impact of doing so, including attracting the attention of tax authorities. National advertising for media in Chin State, meanwhile, is very rare.

The lack of sales experience within Chin media outlets compounds these challenges. When MDIF conducted a sales workshop for Chin media in Kalay, Sagaing Region, in May 2019, the 22 representatives from 12 participating media outlets confirmed that this was the first training of its kind that they had received.

Participants at MDIF's Chin media sales workshop, Kalay, Sagaing Region, May 2019

"We have a lack of skilled human resources in Chin State. It's difficult to create a sales team, to do marketing and to get advertising revenue. The market is really small. Advertisers and audiences are more interested in digital than print. Cable television is also taking some of the advertising and doing better than print. Local businesses don't understand the value of advertising, and often think they don't need to advertise. And we haven't really manged to educate local businesspeople about the benefits of advertising."

The digital transition

CHIN media running digital platforms face a different set of business challenges, notably the know-how to generate online revenue. And even with know-how, given their small audiences, any digital advertising revenue they could secure would be very limited.

Under any circumstances, these multiple challenges would be very hard to overcome. But they are compounded by the fact that Chin media have generally been started by journalists who, prior to founding them, had little or no experience or expertise running a media, and who have thus been forced to learn on-the-job on a day-to-day basis.

Chin media sales workshop, Kalay, Sagaing Region, May 2019

"When it comes to transforming successfully from print to digital, Chin media generally lack adequate know-how. People usually go to social media to post and read news. Because of the wide use of the internet, copy sales are significantly declining, and we don't know how to get revenue from digital platforms. Internet access is also very limited and costly for most of us. We often have to buy data packages to upload content. That is very expensive and the connection is still really bad."

Risks

ALTHOUGH the environment for local media outlets has improved to varying degrees since Myanmar's political opening, practicing journalism in the states and regions remains a risky business. Since that time, two journalists have been killed for doing their jobs, in Mon State in 2013 and Sagaing Region in 2015, and many other journalists and editors have been harassed,

Chin media have generally been started by journalists who, prior to founding them, had little or no experience or expertise running a media, and who have thus been forced to learn on-the-job on a day-to-day basis.

threatened, sued, and imprisoned. Chin State, by comparison, has been quiet. According to Myanmar Press Council's secretary Myint Kyaw, there has only been one official complaint since the political opening, brought by the Chin State government social minister Paung Lun Min Htan in July 2016 against Chin World for an editorial accusing him of manipulating religion for political purposes. The two parties eventually resolved the case out of court.

The stakes were raised, however, when the Rakhine conflict spilled into Chin State's Paletwa Township. When authorities shut down the internet in northern Rakhine State and in neighbouring Paletwa Township in June 2019, journalists were denied access to the affected areas, severely

In the foreground, the Chin State local government office, and further up Aung San Suu Kyi Road, the Chin State Hluttaw (parliament) in the Chin State capital Hakha (August 2019) curtailing their efforts to provide their audiences with accurate information, and forcing them to rely on whatever unverified information the local community and aid groups could get out. According to Myint Kyaw, several months later, in November 2019, Mizo media in Paletwa Township received a threatening letter from the Arakan Army (AA) after they published stories about the AA arresting an NLD MP; the letter ordered them to stop covering the story or to risk reprisals.

Mizo media in Paletwa Township received a threatening letter from the Arakan Army (AA) after they published stories about the AA arresting an NLD MP; the letter ordered them to stop covering the story or to risk reprisals.

Difficulties accessing government-held information is a big challenge for all media in Myanmar, but even more so for outlets operating in ethnic states where local governments and parliaments do not use ethnic languages and are notorious for restricting access to public interest information. Chin State is a prime example. This was exemplified in July 2019 when the Chin Media Network strongly criticised the restrictions placed on the reporting of a Chin State government press conference to review the performance of the state government's third year in office. Prior to the press conference, the government announced that journalists would be limited to three questions, that the questions had to be submitted in advance, and that live broadcasts were prohibited.

The relationship between private Chin media and the local government has historically been strained, and from time to time the authorities threaten to shut down the outlets and to take away their licenses. Even though state-owned media and national media are allowed access, at the time of writing this report, local Chin media were banned from covering the parliament. All of these

"Government and CSO organizations should promote media literacy for the public. That would also be good for us since more people would consume independent media." Khonumthung News Group editor, Robert Ropuia (May 2019)

factors foster self-censorship. And the economic challenges facing media add an additional risk, increasing the risk of corruption and bribes. Chin media expert Michael Suantak also points to the risks journalists take when they cover stories about conflict, land issues, mining, and poppy plantations, as well as those that criticise authorities.

At the time of writing this report, local Chin media were banned from covering the parliament.

Media literacy, a challenge throughout Myanmar, is also a barrier to healthy media consumption in Chin state, with Chin media editors and owners saying that few local people truly understand the role and value of independent media, or understand how to distinguish accurate information from misinformation, disinformation and propaganda.

CHIN RESEARCH DATA AND ANALYSIS

by **Jane Madlyn McElhone**
Director of MDIF's Myanmar Media Program

On the Falam-Hakha road in Chin State

Methodology

THE research for this report was conducted by the Media Development Investment Fund (MDIF) and Myanmar Survey Research (MSR). Both organisations used a mixed method - quantitative and qualitative – approach for their respective work.

MDIF commissioned MSR to conduct audience research on news and information access, usage, trust, preferences, and flows in Chin State and Kalay, Sagaing Region. MSR conducted 400 interviews and 6 focus groups discussions (FGDs) in 8 townships in Chin State and one township in Sagaing Region in May 2019. Due to security concerns, MSR was unable to conduct research in Chin State's 9th township Paletwa.

Whereas prior studies have largely focused on Myanmar as a whole, this is one of the first studies solely assessing the Chin media landscape and

MSR focus group discussion in Kalay, Sagaing Region (May 2019)

audience behaviour. The sample size allows for a robust comparison of results across different levels of disaggregation including age, gender, rural vs urban and education. The sample size is statistically sound, allowing for the data to be analyzed at a 95% confidence level and with a margin of error below 5 percentage points (plus or minus). The complete MSR methodology and research findings can be found in the chapter entitled: Chin Media Audience Research.

As well as commissioning MSR to conduct audience research, MDIF assessed the state of Chin media via interviews and site visits in 2018 and 2019, as well as interviews with media experts and practitioners, and a review of relevant reports.

MDIF surveyed the media in person or by phone, with follow-up e-mail verification. The information provided was cross-checked with industry experts and observers. Responses were captured in a database for recordkeeping and analysis. In May 2019 MDIF organised a workshop and focus group discussion with 20 Chin media outlets in Kalay, Sagaing Region, in collaboration with the Chin Media Network; during the workshop participating Chin media editors discussed and verified MDIF's initial findings and mapping, and provided additional feedback and data. The data was then verified at an MDIF Chin media workshop in Kalay in October 2019, as well as subsequently by phone.

To the best of MDIF's knowledge, the research covers all local Chin media in Myanmar that were producing news and information as of November

> **In a rapidly evolving local media environment, with outlets opening and closing and modifying their operations, the information contained in this report is liable to change and thus is best viewed as a snapshot in time.**

Chin media editors and journalists reviewing MDIF's Chin media map (MDIF sales workshop for Chin media in Kalay, Sagaing Region, May 2019)

Chin media discussing organisational challenges and business plans (MDIF digital sales and marketing workshop for Chin media in Kalay, Sagaing Region, October 2019)

2019. However, in a rapidly evolving local media environment, with outlets opening and closing and modifying their operations, the information contained in this report is liable to change and thus is best viewed as a snapshot in time. At the advice of community radio experts working in Chin State, as well as the Chin Media Network, we did not include online community radio stations in our research.

The outlets included in the report and maps are officially registered as private entities and half of them self-define as businesses. MDIF is not commenting on their level of independence or the quality of their journalism. A variety of names are used to reference ethnic minority nationalities and ethnic states and townships; for the purposes of this report, and to ensure consistency and clarity, names and information were cross-checked with Chin journalists and editors.

Summary of Chin media outlet findings

When MDIF published its local media report An Unfavorable Business: Running Local Media in Myanmar's Ethnic States and Regions in November 2018, 16 of the 55 outlets surveyed were Chin. Six months later we have mapped and surveyed 25 Chin outlets – an increase of nine. This change in number in the 2019 findings can be attributed to the shifting nature of the sector, the challenge of verifying data, and the results obtained from ongoing research.

What has not changed since 2018, however, is the dominance of Chin media outlets in Myanmar's local media landscape in terms of number.

What has not changed since 2018, however, is the dominance of Chin media outlets in Myanmar's local media landscape in terms of number. There is at least one local media outlet in all seven ethnic states, as well as in the seven regions; of

Hakha Post in Hakha, Chin State (December 2018)

Participants at MDIF's Chin media sales workshop, Kalay, Sagaing Region, May 2019

What makes you proud?

"We are the only local media in our area."

"We are trying to produce fair and balanced local news for local people."

"We act as a bridge between local people and the authorities."

"We are helping to preserve local languages and to give local people a voice."

"We have built a loyal audience that trusts us."

"We are working to strengthen local democracy."

"We help to educate local people."

"We've never failed to publish."

"We're independent."

"We're watchdogs."

these, Chin State, Shan State and Sagaing Region continue to dominate. With 15 outlets, Sagaing Region has the most local media, yet only two of the outlets - one in Kalay and one in Monywa - are non-Chin media. Shan State is second with 9 outlets, with an additional outlet in Yangon, making a total of 10. Yet if you consider the total number of Chin outlets in all locations, they are far and away the greatest in number, with a total of 25.

Local media establishment has surged across Myanmar's 14 ethnic states and regions since the political opening, and Chin State is no different. Eighteen of the 25 Chin media mapped by MDIF have been launched since 2011. The other seven were launched prior to the opening, including two in exile and/or in Myanmar's borderlands. All of the Chin media established since the political opening have been launched inside the country. Of these, 11 began operations between 2011-2015, and seven between 2016-2019.

Ten of the 25 Chin outlets included in this report have their main offices in Chin State: three in Hakha, three in Tedim, one in Falam, one in Mindat, one in Matupi, and one in Paletwa. Thirteen have their main offices in Kalay, Sagaing Region, and two in Yangon. One Chin outlet maintains a cross-border office in India.

> **Digital is increasingly the most popular publishing platform for Chin outlets, although print also remains important.**

Digital is increasingly the most popular publishing platform for Chin outlets, although print also remains important, with 14 of the 22 outlets publishing some form of print. According to the research findings, 12 outlets (55%) have both print and digital platforms, 11 (36%) are digital only, and two (9%) are print only. Compare this to 45 of 55 (81%) local media outlets operating across the country that publish print media, according to MDIF's 2018 local media report.

Of the Chin outlets that produce digital content, 18 (72%) are multi-media (text, photos, video and/or audio), 12 (48%) have both a website and a Facebook page, and 11 (44%) only publish on Facebook. By comparison, a larger percentage of the 55 local media outlets across the states and regions that were surveyed in 2018 were multimedia (80%), with Facebook pages and, in some cases, websites, as well as, increasingly, online video and audio, while ten (19%) were digital only, and one (2%) print only.

Based on our current research, 11 of the 25 Chin media outlets (44%) publish exclusively in one of four Chin languages (Falam, Hakha, Matupi, and Tedim (Zomi), eight publish both in Myanmar and a Chin language (32%), three publish solely in Myanmar language (12%), two publish in a

> **"People are moving to digital platforms to consume news. I think television and mobile-based digital channels will have greater impact in the future." Zomi Post News CEO Do Khan Thang**

Zomi Post News (Kalay, Sagaing Region)

mixture of Chin, Myanmar and English (8%), and one publishes in Myanmar and English (4%).

> **"It's good to publish in Myanmar language to reach wider audiences, but it's endangering our local languages." Matupi Times editor Li Silong**

As noted earlier, many of the Chin local media outlets are very small, and 18 (72%) say they produce five or fewer stories a day. Fifteen outlets (60%) have 5-10 staff, five (20%) have fewer than 5, and another five (20%) have 11-25. The small numbers of full-time staff (approximately 39% of all staff are full-time) are supplemented with freelance and part-time support for news-gathering and print distribution. These findings put Chin media on a par with local media elsewhere in the country: in MDIF's 2018 local media report we found that the majority of local media across the states and regions produced five or fewer stories a day, and had fewer than 10 people on staff.

Media businesses

> **"Our local languages are very diverse and spread out regionally, so the market for each region is very small." Hakha Post chief editor & managing director Lalawmpuia (known as Papui)**

MORE than half of the Chin media outlets interviewed for this report self-define as private businesses, while others say they are non-profit organisations (eg: educational institutions, ethnic language literacy organisations, etc). According to our 2018 report, this is similar to the situation elsewhere in the country, with 50% of outlets stating they were private companies.

Nineteen of the 25 Chin outlets interviewed say they have staff that fulfill non-editorial (business-related) functions, such as sales, advertising and distribution, but only eight have full-time business staff. Of the 19, four have a mix of full and part-time business staff, while four have solely full-time business staff, and 11 have only part-time staff. The other six have no business staff at all. In Chin State and elsewhere, it is quite common for local media staff to assume both business and editorial responsibilities, especially when they are part-time.

With regards to revenue, the majority of the Chin media outlets surveyed - 19 out of 25 - reported some form of commercial revenue, albeit often very small. This is similar to the situation of local media elsewhere in the country. Only two of the 25 Chin media outlets said they relied solely on commercial revenue, a number that is also comparable to media operations elsewhere in the country.

In Chin State, commercial revenue sources are largely limited to print copy and advertising sales. Chin outlets have barely begun to generate income from digital advertising and content sales, revenue streams which, while still very modest, are gradually growing elsewhere around the country.

There is a significantly higher number of Chin media with no commercial revenue at all compared to their counterparts elsewhere: five of the 25 Chin outlets (20%) in 2019 compared to just four of the 55 (7%) local media throughout the country in 2018. The Chin media in question say they rely wholly on funds from personal investments and savings, local support and donations, other (non-media) business activities, and for a very few, INGO grants.

Compared to other parts of the country, international donor/INGO support for private media is very low in Chin State, with only two of the 25 outlets (8%) reporting that they had received any international donor/INGO support, compared

The Chinland Post (Hakha, Chin State)

to 25% of the 55 local media country-wide in 2018. Chin outlets do cite, however, a similar level of local support/donations (24%) as their local media counterparts (25%) elsewhere in the country. While two of the outlets say they are entirely financed by commercial revenues, sustainability is such a challenge that many do not believe it is possible. According to at least one participant at MDIF’s Chin media workshop in Kalay in May 2019, “Chin media can’t be run commercially - only as a community service.”

Advertising

DIGITAL advertising continues to be a struggle, both in Chin State and across the ethnic states and regions. Six of the 25 Chin media outlets interviewed (24%) reported publishing some form of digital advertising over the past 12 months, somewhat lower than the 33% of local media outlets across the states and regions. In both cases, though, income generated from digital advertising is very small.

Fourteen of the 25 Chin media (56%) publish some form of print publication and 13 (93%) say they have secured advertising over the past 12 months.

Fourteen of the 25 Chin media (56%) publish some form of print publication and 13 (93%) say they have secured advertising over the past 12 months. This is higher than the 87% of print media outlets across the states and regions that had some form of advertising in their publications in 2018.

The Voice Daily Head of Sales Ei Marlar working with Chin media on sales and marketing (MDIF digital sales and marketing workshop for Chin media in Kalay, Sagaing Region, October 2019)

Content Sales

Participants at MDIF's Chin media sales workshop, Kalay, Sagaing Region, May 2019

"It's difficult to sell Chin media content to national media because generally the national media aren't interested, and the quality of Chin content is often not of a high enough standard."

WHILE MDIF's 2018 research found that that more than half of local media outlets across the country reported revenue from the sale of their content to other media, only 9 of the 25 Chin media outlets (36%) report doing so in 2019. The Chin outlets produce and sell content for, among others, the Ethnic Language TV (ELTV) series produced by Burma News International's ethnic media members and broadcast on DVB, the National Races Channel in Falam, Radio Free Asia (RFA), Frontier's Doh Athan podcast, CCN Chin Overseas Media Group, and Chin TV International. Some of the outlets also share content with each other, in some cases for a fee, and in others, for free, as well with local cable channels.

Print media

Fourteen of the 25 Chin media outlets (56%) say they publish print media, compared to 45 of the 55 outlets (82%) across the states and regions interviewed in 2018. So while print media constituted the primary local media format across the states and regions in 2018, the picture is different for Chin media outlets in 2019. Twelve outlets (48%) publish on both print and digital platforms, and 11 (44%) are digital only. Two are print only. A total of 23 outlets (92%) thus publish content on some kind of digital site, making it the primary platform for Chin media.

Zoheisa News Agency in Kalay, Sagaing Region produces content for Chin cable tv as a source of revenue

Participants at MDIF's Chin media sales workshop, Kalay, Sagaing Region, May 2019

"There's not a lot of support for Chin media and it is difficult to sustain our operations through self-financing, donations, advertising, copy sales and the like. The government doesn't have any plans, and it doesn't advertise in local media. It also doesn't encourage its offices to support local media. At the same time, local and international donors are decreasing their support for media. Many of us have cash flow problems. Sometimes we need to stop printing for a while because we don't have enough money."

For the 14 Chin outlets that do publish print, five say they publish weeklies, four, bi-weeklies, two, monthlies, one, 3 times a week, and two, 5 times a week. (The latter frequency – 5 times a week - is considered a daily in the Chin context.). Poor infrastructure and natural disasters, such as flooding and landslides, especially in remote locations such as Chin State, continue to undermine some outlets' ability to maintain regular frequencies. Many publications tend to be small. Of the 14 Chin print media we researched, eight are under 10 pages, four are 10-19 pages, and two are more than 40 pages.

The price of Chin print media varies, with five charging 200-500 MMK (13-33 cents), two, 500 MMK (33 cents), four, less than 200 MMK (less than 13 cents), and two, 1000-1500 MMK (67 cents - $1). The price tends to depend on the number of pages and the frequency of publication, as

Founding Chief Editor of Chinland Herald Salai Nhge Pi in Falam, Chin State well as associated costs, including printing and distribution. One of the Chin print publications is distributed for free.

Given the scarcity of commercial printers in Myanmar's states and regions, printing is a major challenge and cost for local publishers. Of the 14 Chin media outlets that publish print, seven print in-house using digital printers or copiers, three out-source printing within their local markets, three print in Yangon, and one in Mandalay. That half publish in-house makes Chin outlets unique and can be explained, at least in part, by the fact that most Chin media have comparatively smaller circulations that the outlets in other ethnic states and regions. Their geographical remoteness also makes printing locally a practical choice. By comparison, the vast majority of the 45 local print publishers across the states and regions that were interviewed in 2018 said they used printers in Yangon and Mandalay, while 12 used printing houses in their own states or regions, and only six printed in-house.

> **Most Chin outlets that publish print distribute more than half of their copies in Chin State.**

Most Chin outlets that publish print distribute more than half of their copies in Chin State. Only two distribute more than half in Kalay, Sagaing Region, and one, half in Chin State and the other half in Kalay Township.

Participants at the MDIF Chin media sales workshop, Kalay, Sagaing Region, May 2019

"The Chin media network members should collaborate to establish an outlet that can represent all of Chin State."

Estimated readership

ESTIMATED readership for the 14 Chin print outlets is small, 3000-5000 for the majority, and only 2 above 5000. MDIF estimates readership based on circulation, pass-along readership, and estimated public access.

With a view to sustainability, editors stress that Chin media need to find a way to work together in a more efficient and useful way. Despite the existence of the Chin Media Network, they all agree that the linguistic diversity in Chin State, as well as the geographical barriers and remoteness, make it difficult for outlets to distribute and sell to each other and to other regions and states, as well as to communicate and create partnerships.

For more information, please refer to the Chin media data charts in this report. Please click here for more information about MDIF's 2018 local media report.

CHIN MEDIA AUDIENCE RESEARCH SUMMARY

by **Myanmar Survey Research (MSR)**

9 key Chin media audience findings

MSR research[1]

1 Slow and limited access to news and information: For decades, the Chin population has been largely deprived of access to timely news and information because of the state's geographic isolation and poor infrastructure. Today, limited electricity and connectivity, as well as the cost of services, are the biggest barriers. All of these factors are linked to, and exacerbated by, the poverty and weak economic base in Chin State which, in turn, impact negatively on media audiences' literacy levels, including in Chin languages.

2 A preference for local: There is a significant preference for locally produced media content in local languages, particularly if it is about Myanmar's regions and states, including notably Chin State. There is also a significant preference for international views about Myanmar. News about neighboring countries, on the other hand, elicits less interest.

3 Prevalence of mobile phones: Almost everyone who accesses the internet does so via mobile phones (96%); very few use tablets (7%), laptops (5%) or desktop computers (1%). Most people use their phones to watch videos (77%) and only a few send emails (27%), or post comments on news sites or blogs (24%).

Farmer from a rural part of Kalay Township, Sagaing Region (FGD participant)

"We read local media because it's trustworthy, and because it's in our mother tongue, we understand it really well."

4 Facebook popularity: Much like the rest of the country, the Facebook app is the principal platform for accessing the internet as a whole, rather than other apps or direct access via website browsers. The most popular messaging apps are Facebook Messenger (57% of the population), followed by Viber (at 27%). Facebook is the third most accessible media platform in Chin State, following television and radio, but the second most consumed, again following television.

5 Importance of television: Television is the most accessible media platform for ethnic

1 MSR is a leading research company with more than 24 years of experience conducting quantitative and qualitative research on a wide range of topics in Myanmar (www.myanmarsurveyresearch.com).

Chin with 98% of the urban population, and 91% of the rural population, saying they have access to it. It is also the most consumed platform, followed by Facebook. The majority of respondents have access to free-to-Air or satellite (pay) TV in either their own homes or in other places. Yet there is a rural-urban divide: the majority of the rural population does not pay for access to television (71% watch free-to-air) and 48% have access in their own home, whereas in urban areas, 89% have access at home and 28.5% pay for the tv channels they consume. Overall, there is a weak correlation between the popularity of a TV channel and the extent to which its news and information are trusted; for example, the military owned Myawaddy channel is one of the most popular media outlets for Chin but less than half of regular viewers say they fully trust its news content.

6 Limited interest in radio: Radio is the second most accessible media platform cited overall, and radio devices are easily available to most people, yet only a third of the population regularly listens to it, whether on a daily, weekly, or monthly basis. Cited accessibility for community radio is 59%, but only 20% cite listening to it on a regular basis. Online radio has a cited accessibility rate of 49%, but only 10% cite listening to it on a regular basis.

7 Print media surviving (for now): Print is considered a reliable news source. However, given that it is often difficult to access up-to-date print publications, especially in rural areas of Chin State and Kalay Township, Sagaing Region (FDG participant), the access and consumption rates of print media are lower than for other platforms.

60-year-old man from a rural area in Kalay Township, Sagaing Region (FDG participant)

"Since smart phones are now available, I read less. And since news is available on phones, a local newspaper that used to be published twice a month has stopped due to decreased demand."

8 Trust: The Chin population prefers to share news, information and opinions, especially on sensitive topics, within its own trusted social circles. Chin place less trust in news content on Facebook, as compared to other media platforms, due to an increasing awareness that it hosts a lot of so-called 'fake news' (disinformation, misinformation and propaganda). Trust in media outlets is not generally based on ownership or overall reputation; instead, outlets' reliability is commonly assessed on a story-by-story basis.

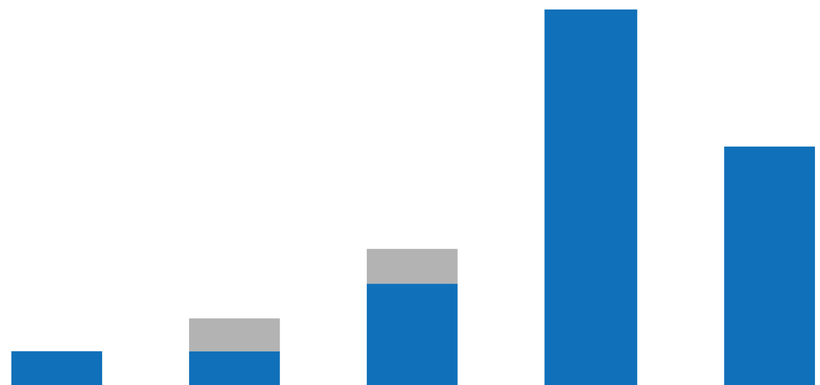
9 Preferred news and information topics: Health, politics and business are the most popular topics cited.

CHIN MEDIA DATA CHARTS

MDIF gathered the data for these charts during face-to-face interviews and phone calls with 25 Chin local media outlets in Chin State, Kalay, Sagaing Region, and Yangon in 2018 and 2019. It then did a final verification with the outlets in the weeks leading up to the publication of this report. Local media are defined as those that function primarily to serve the information needs of a particular geographic area or a particular ethnic nationality. To the best of MDIF's knowledge, the research covers all private local Chin media producing news and information. During the research period some Chin media outlets opened and others closed. MDIF has done its best to update the charts accordingly, however there may be omissions. Also, as the sector is rapidly evolving, the information contained in this report is liable to change. The outlets are private; MDIF is not commenting on their level of independence or the quality of their journalism. People use a variety of names to reference ethnic minority nationalities and ethnic states; for the sake of consistency and clarity, in this report we use official names, except in direct quotations.

FOUNDING OF CHIN MEDIA OUTLETS

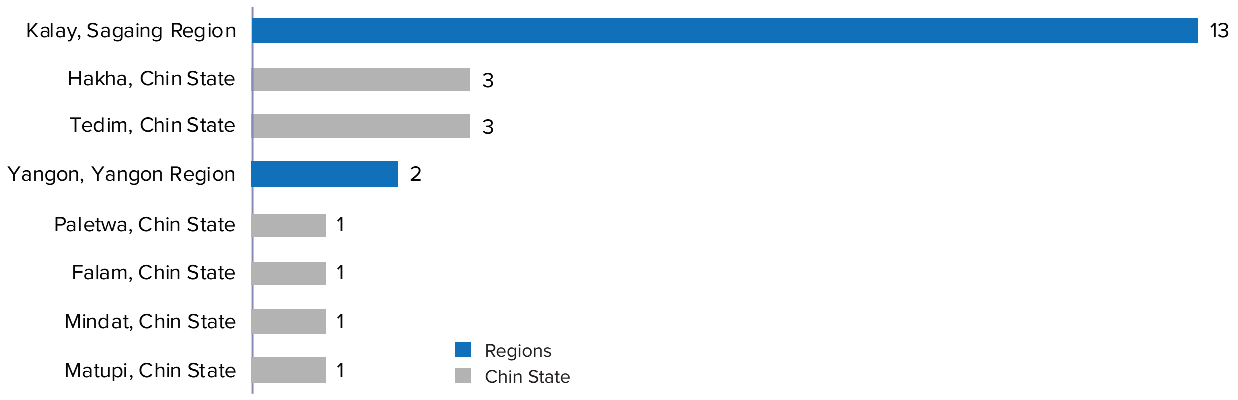
Figure 1: Period and location
(n=25)



	Before 2000	2000 to 2005	2006 to 2010	2011 to 2015	2016 to 2019
Borderlands/outside of Myanmar	0	1	1	0	0
In Myanmar	1	1	3	11	7

LOCATION OF CHIN MEDIA OUTLETS:

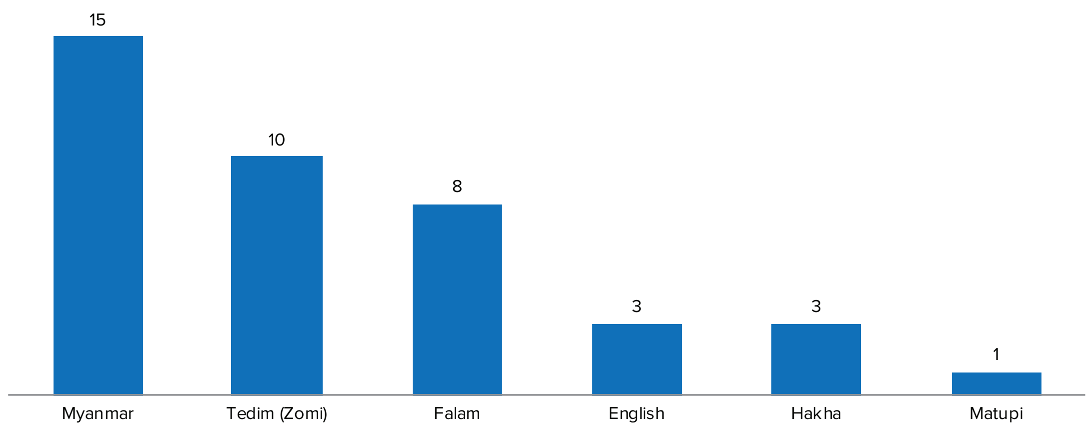
Figure 2: Main office locations
(n=25)



CHIN MEDIA OUTLETS' LANGUAGE USE:

Figure 3: Language use - multiple answers from outlets for all platforms

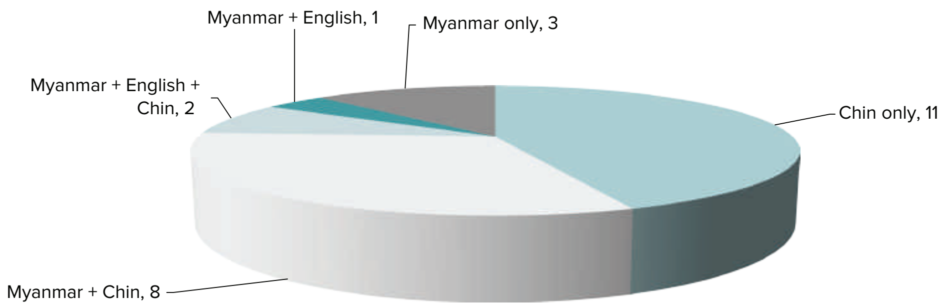
(n=25)



CHIN MEDIA OUTLETS' LANGUAGE MIX:

Figure 4: Language Mix
(n = 25)

The vast majority of Chin media outlets publish in a Chin language, including Falam, Hakha, Tedim (Zomi), and Matupi. Nine outlets publish exclusively in ethnic languages. Myanmar is also widely used.



CHIN MEDIA OUTLETS' PLATFORM MIX:

Most Chin media outlets publish on print and digital platforms. Two are print only. Twenty-three have some form of digital platform; the majority of these are Facebook only. Eight publish on YouTube.

Figure 5: Platform Mix
(n=25)

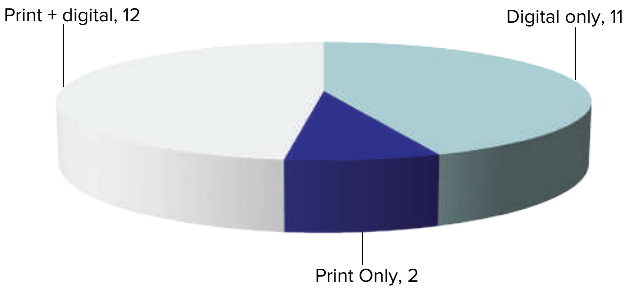


Figure 6: Digital Mix
(n=23)

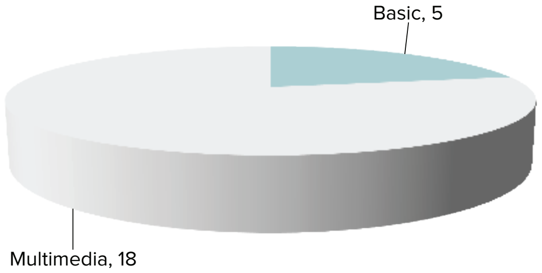
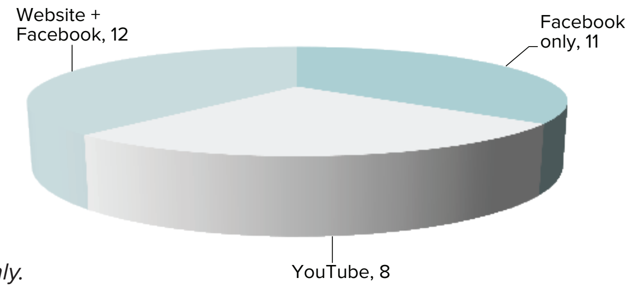


Figure 7: Platform Mix
(n =23, multiple responses)

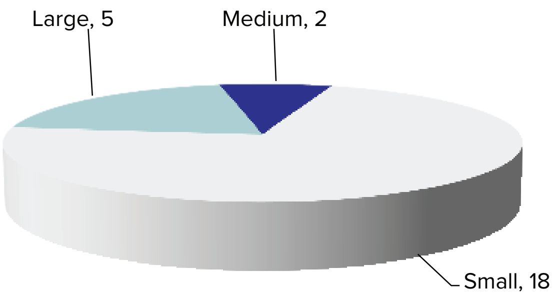


Basic digital = Text + photo, only.
Multimedia = Basic + video and/or audio.

CHIN MEDIA OUTLETS' SIZE AND OUTPUT:

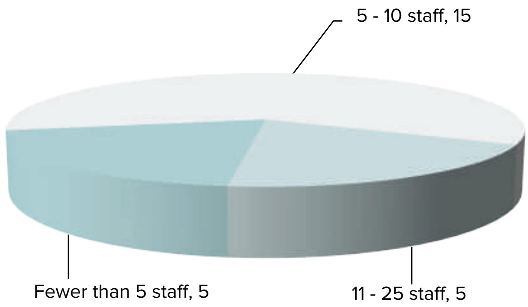
Most Chin media outlets are relatively small, both in terms of daily news output and staff size. The totals indicated below include both full and part-time staff, as well as volunteer staff.

Figure 8: Daily story output
(n = 25)



Small = Up to 5 stories/day
Medium = 6 to 9 stories/day
Large = 10 or more stories/day

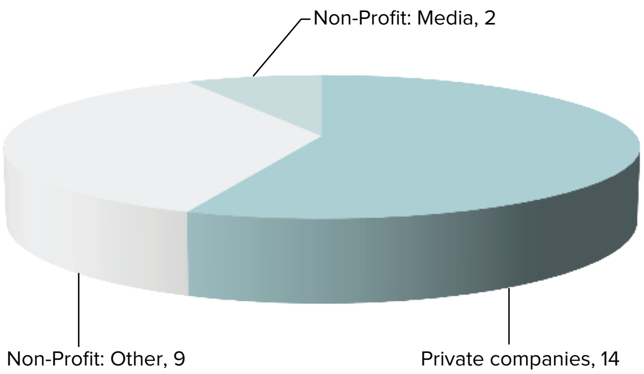
Figure 9: Staff
(n = 25)



CHIN MEDIA OUTLETS' ORGANISATION TYPE:

More than half of Chin media say they are private companies.

Figure 8: Daily story output
(n = 25)

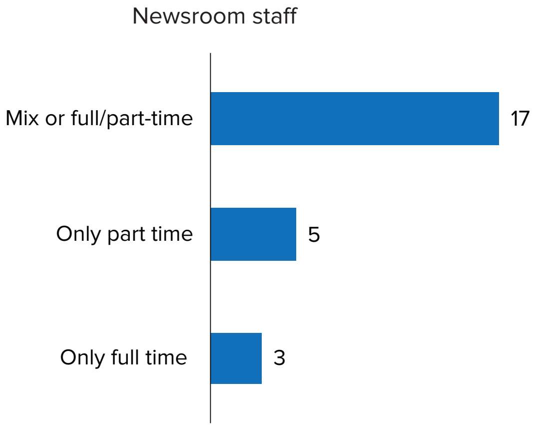


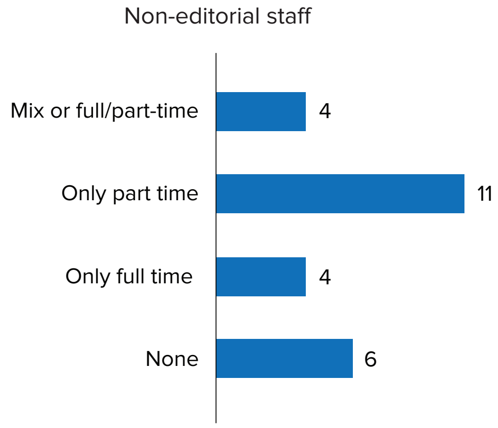
- Private for-profit companies and not-for-profit organisations are a new concept for many.
- Other non-profits were mostly education and ethnic language literacy organisations.

CHIN MEDIA OUTLETS' STAFFING:

While full-time staff sizes are small, many outlets have part-time staff for both their news and business operations. Some of the staff at certain outlets work on a volunteer basis.

Figure 11: Media staff summary
(n = 25)

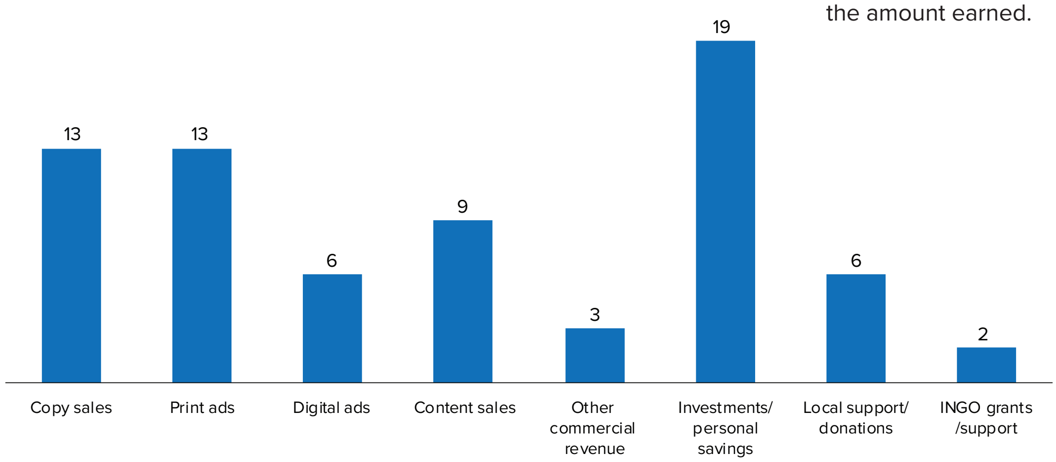




CHIN MEDIA OUTLETS' INCOME SOURCES:

The large number of outlets that have made personal investments or used personal savings to run their outlets is striking, as is the low level of grant/ donor support reliance. The chart below indicates all income sources (business and non-business) but not the amount earned.

Figure 12: Income sources
(n = 25, multiple responses)



CHIN MEDIA REVENUE MIX:

Figure 13: Sources of income - past 12 months
(n = 25)

Most Chin media rely on a variety of funding sources, including commercial revenue, local support/ donations, INGO grants, other business activities and investment/personal savings.

This chart indicates all income sources (business and non-business) but not the amount earned.

CHIN MEDIA COMMERCIAL REVENUE MIX:

Commercial revenue includes copy sales, print and digital ads, and content sales. Print copy and advertising sales are the dominant commercial revenue sources. One-fifth report no media related commercial revenues. The chart below indicates commercial income sources but not the amount earned.

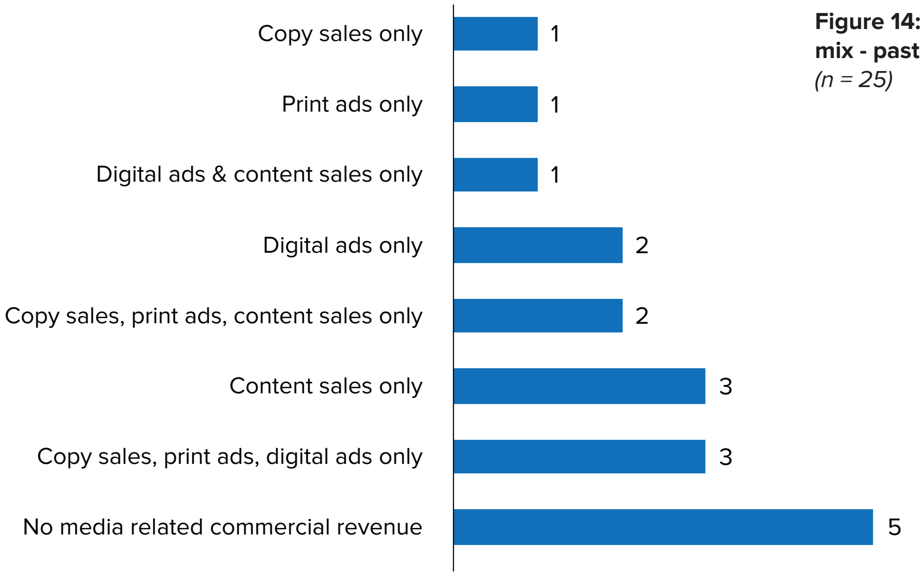


Figure 14: Commercial revenue mix - past 12 months
(n = 25)

CHIN MEDIA MEDIA MIX & PRINT FREQUENCY

The majority of Chin media platforms are digital only, or a mix of print and digital. The majority of print publications are weeklies.

Figure 15: Media mix
(n = 25)

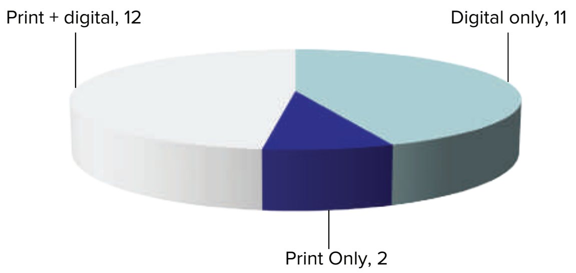
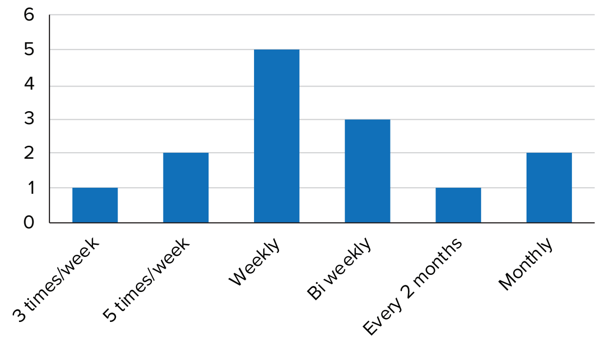


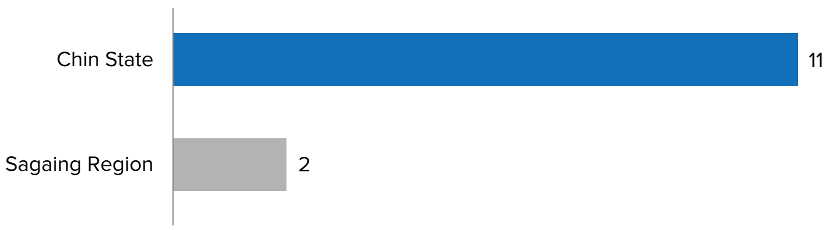
Figure 16: Print frequency
(n = 14)



CHIN MEDIA PRIMARY PRINT MARKETS:

Primary print market refers to locations where media distribute more than 50% of their print copies.

Figure 17:
Primary print markets
(n = 14)



CHIN MEDIA SIZE AND READERSHIP:

Print publications vary in terms of size & estimated readership. Most of the publications are small and readership per issue (circulation + pass along + public access) is estimated to be approximately three times the number of circulation copies.

Figure 18: Pages/issue
(n = 14)

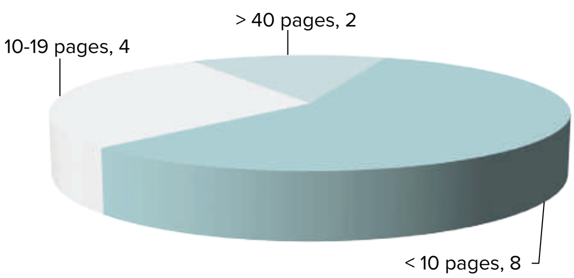
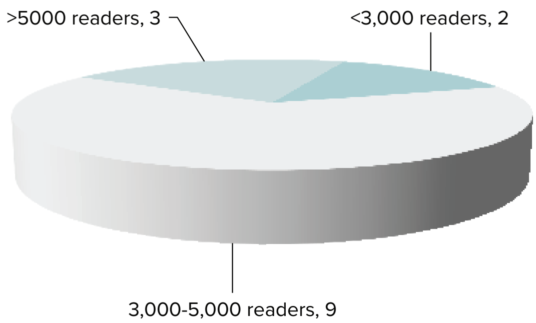


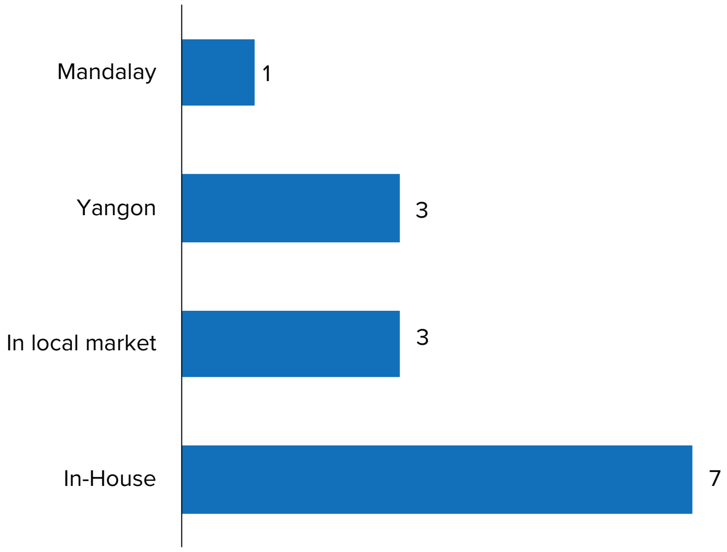
Figure 19: Readership/issue
(n = 14)



CHIN MEDIA PRINT LOCATIONS:

A comparatively high number of Chin outlets print in-house or in the local market.

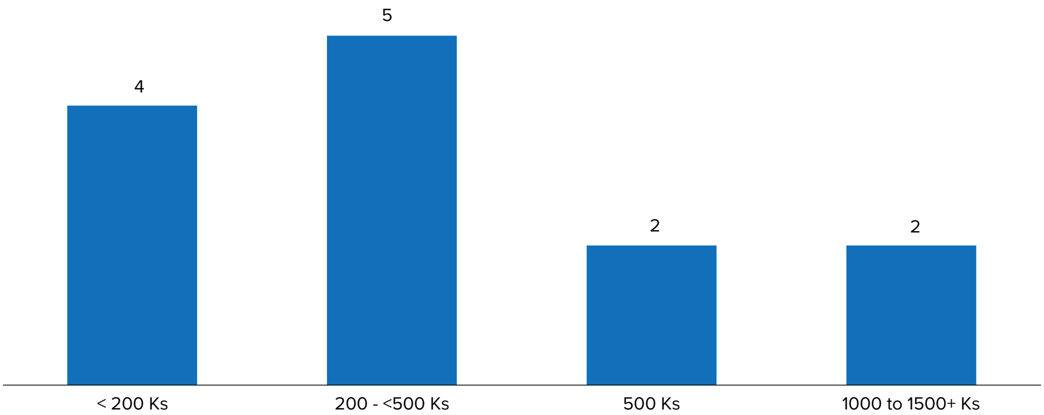
Figure 20: Printing location
(n = 14)



CHIN MEDIA NEWSSTAND PRICE:

The newsstand price varies, with the number of pages generally determining the price. Thirteen outlets are included below as the 14th outlet distributes its publication for free.

Figure 21: Newsstand price
(n = 14)



CHIN MEDIA AUDIENCE RESEARCH

by **Myanmar Survey Research (MSR)**

Distributing Hakha Post daily newspaper to a shopkeeper in Hakha, Chin State (2018)

News and Information Sources, Access, Usage, Preferences, Trust, and Flows

THIS research, based on 400 quantitative interviews in eight townships in Chin State and Kalay Township in Sagaing Region, as well as six focus group discussions in Hakha and Tedim in Chin State, and Kalay in Sagaing Region, assesses the Chin population's preferred news and information sources, media access, usage, preferences, trust and flows. The research uses a mixed method - quantitative and qualitative – approach. To the best of our knowledge, this is the first study solely assessing the Chin media landscape and the media consumption behaviours of the Chin population. Only the Chin population of the sampled townships was surveyed: 20% Hakha, 17% Tedim, 20% Falam, 10% Matupi, and 33.8% who self-defined as coming from a variety of other ethnicities. The sample has a representative geographical, gender and age distribution, and the research findings are statistically valid for the entire Chin population.

According to MSR's findings, access to news is important for the majority of the Chin population, but consumption depends on the availability and affordability of news sources. There are various media sources and platforms available, with differences in access for rural and urban populations and different age groups. Television, in the form of either free-to-air or satellite TV at home or in other places, is the most accessible platform. Television is followed by FM radio, Facebook, daily newspapers[1], journals (of varying frequencies), and other online platforms (in order of importance: YouTube, websites, online radio and other social media sites).

The research makes a distinction between accessibility and use (consumption)[2]. Television, radio, Facebook and print media are the most accessible news sources for the Chin population, with over 70% having access. However, accessibility does not necessarily translate into use (consumption). For example, while the vast majority cite accessibility to television (93%), only 65% watch it. Similarly, while 77% cite access to FM radio, just 31% listen to it. Facebook, on the other hand, has the most consistent access (76%) vs consumption (55%) rates. For daily newspapers the difference between accessibility and consumption is much greater: 71% of the population cites access to daily newspapers, but only 29% reads them.

Table 1 – Access vs Use (Consumption)

Media source	Access to media source (Cited by the respondents)	Consumption of media source (Daily, weekly, monthly)
TV	93%	65%
FM radio	77%	31%
Facebook	76%	55%
Daily newspapers	71%	29%
Journals	69%	27%
YouTube	60%	29%
Online TV	59%	25%
Community radio	59%	20%
Websites	58%	24%
Online radio	49%	10%
Social media (excluding Facebook)	47%	5%

n=400

Trust influences the choice of news and information sources. According to MSR's research, a news outlet's reputation, for example, is determined on a story-by-story basis rather than by the outlet's overall performance or past reputation. According to focus group respondents interviewed in all of the survey areas, this helps to explain why ownership is not a crucial factor when it comes to trust or choice of outlets. Overall, news from radio and print media outlets is the most trusted, followed by TV news, while news published on social media is the least trusted, in great part because people are aware of 'fake news' (disinformation, misinformation and propaganda) being circulated on Facebook. Accordingly, 32% of respondents that access Facebook find news on the platform trustworthy, well below the trust placed in other news sources.

Given the popularity of the Facebook app, with 55% of the Chin population using it to access the internet, it would seem logical to assume that people would also use the internet to access other online media sites. Yet this is not necessarily the case. Many respondents seemed unaware that they could use the same internet connection to access other digital platforms via an internet browser or other apps, whether online television, online radio, YouTube or various websites. There are a number of possible explanations for this. In the past, several telecommunication providers allowed their mobile customers to use a limited version of Facebook (known as Facebook Basics) without data

1 This includes national dailies and local dailies that are usually published 5 or 6 days a week

2 Accessibility means that Chin theoretically have access to a certain media source. Consumption is the number/percentage of times they actually use, watch or listen to it.

charges. Most mobile phone shops pre-install the Facebook app and pre-create Facebook accounts for mobile phone customers. The Facebook app's simplicity makes it comparatively user-friendly and accessible. In addition, as in many other areas of the country, there are low rates of media literacy in Chin State, and Facebook remains by far the most popular news and information site across the country, yet many people still do not seem to know that when they are on Facebook they are using the internet.

With regards to preferred topics, Chin living in Chin State and Sagaing Region are interested in a variety of local, national and international news, including how international media view and portray Myanmar news. They are less interested in news about neighboring countries. They most regularly consume news about health, politics and business, and most frequently share news they deem interesting with friends, family and neighbors. There is a reluctance to share beyond these close circles, particularly when it comes to opinions. There is a preference for news in Chin languages.

Methodological approach

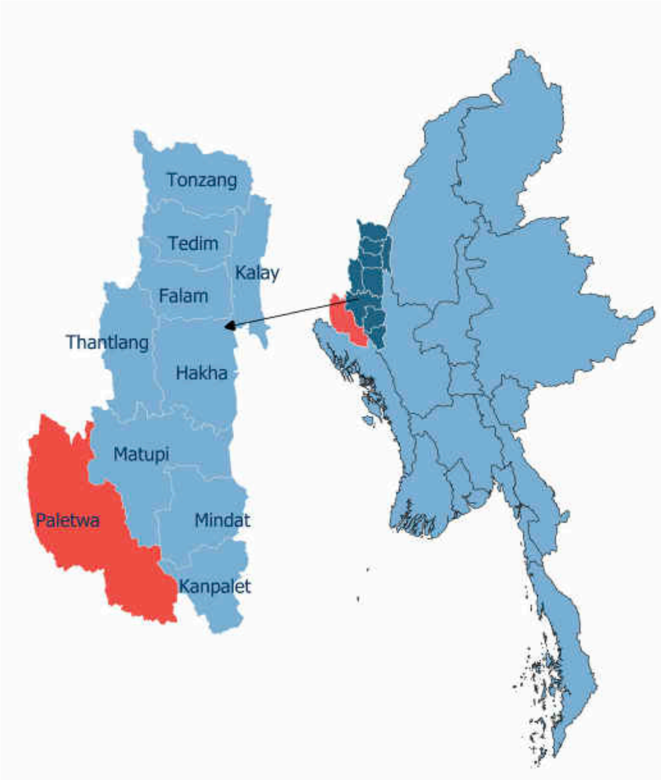
Study design

The survey used a mixed method - quantitative and qualitative - research approach. The household quantitative survey results were probed and confirmed using qualitative data gathered from focus group discussions (FGDs).

MSR conducted four hundred household interviews in May 2019 in eight of the nine townships in Chin State, as well as in Kalay Township, Sagaing Region. Due to security concerns, the ninth Chin State township - Paletwa - was excluded from the sampling. As 55% of the population is ethnically Chin, Kalay Township was included in the survey.

Table 2 - Sample size per township

Township	Total Population	Percentage	Sample Size	Urban	Rural
Tonzang (includes Cikha sub-township)	18,122	5%	30	10	20
Kanpalet	12,119	3%	30	10	20
Matupi (includes Reazu sub-township)	31,173	9%	40	10	30
Mindat	24,461	7%	30	10	20
Falam (Rihkhuadal sub-township)	29,789	8%	40	10	30
Thantlang	30,260	8%	30	10	20
Hakha	31,564	9%	40	20	20
Tedim	51,934	14%	60	10	50
Kalay (Sagaing Region)	132,605	37%	100	40	60
Total	362,027	100.00%	400	130	270



Map of sampled townships in Chin State and Kalay Township, Sagaing Region. (Paletwa Township in Chin State (highlighted in red) was excluded due to security risks.)

The sample size per township varied according to each township's total population (Table 2).[3 4]

MSR also conducted six FGDs in May 2019 in the 3 most populous townships in the research area: two were in Chin State (Tedim and Falam), and the third in Sagaing Region (Kalay), with a total of 43 participants (Table 3).

3 Urban and rural areas are officially defined by Myanmar's 2014 population census. With the exception of townships in Yangon and Mandalay, each township in Myanmar includes urban and rural areas. Urban areas are called wards; rural areas are called villages. On average, each township has approximately 5 wards and 80 villages. Time and financial constraints did not allow the researchers to conduct separate FGDs for men and women; nonetheless, both women and men actively participated and shared their opinions.

4 To ensure robust and statistically valid findings, n=30 was the minimum number of interviews conducted in each township (with the total number of interviews being (n=400)). Even though its comparatively larger population would have allowed for more, this meant Kalay Township was restricted to a 100-interview sample size; the completed sample size for Kalay Township is nonetheless statistically robust.

Table 3 - Focus group discussions

Township	FGD Type	Urban / Rural	No. of Participants
Kalay	Under 35	Urban	5 men / 3 women
Kalay	Over 35	Rural	4 men / 2 women
Tedim	Under 35	Rural	4 men / 3 women
Tedim	Over 35	Urban	4 men / 4 women
Falam	Under 35	Urban	4 men / 4 women
Falam	Over 35	Rural	3 men / 3 women

Data collection instruments

MSR developed a quantitative household questionnaire for the purposes of this research study, including general household questions, questions about media access, media and platform usage (television, radio, print and digital), and questions about trust. For more information, please consult the questionnaire in the Appendices.

MSR also developed a qualitative topic guide for the FGDs, and then tested it during a pilot (n=60 quantitative interviews and one FGD) to assess the clarity of the questionnaire and topic guide, including instructions for enumerators, and to ascertain if any of the questions were particularly difficult and/or sensitive. Based on this, MSR finalised the quantitative questionnaire and qualitative guidelines for fieldwork.

Sampling plan

MSR developed a detailed sample design for the quantitative and qualitative components of the research. Four hundred respondents in Chin State and Kalay Township, Sagaing Region, were sampled by applying a multi-stage sampling approach.

The sample target for each township was based on the total population and distributed proportionally on a rural/urban basis. Villages and wards were selected randomly. Interviews were conducted in a total of 10 households in each enumeration area. All respondents were randomly selected using the Kish Grid method.[5]

The sample size allows for a robust comparison of results across different levels of disaggregation including age, gender, rural vs urban and education. The sample size is statistically robust, allowing for the data to be analysed at a 95% confidence level and with a margin of error below 5 percentage points (plus or minus).

The sample size for this study is n=400 completed questionnaires. The respondents answered all of the questions, except in specific circumstances when their answers to a previous question made follow-up questions redundant. Respondents who cited access to a specific media source, for example, were asked about the frequency of that access; if respondents did not cite access, however, they were not asked the follow-up questions. Of the 400 respondents interviewed, only 373 cite access to television; that means that only these 373 were asked about the frequency of television access. These are called filtered questions. In total, there were 35 filtered questions (56%) in the questionnaire. Even in these cases, the results are nonetheless statistically robust and represent the views, habits and opinions of the Chin population.

The qualitative component of the study was conducted in three locations - Kalay, Falam and Tedim – that have comparatively large populations, including a variety of ethnicities, and that are relatively accessible to people from remote areas. This makes them prime locations for FGDs that aim to include a diverse group of respondents. In order to obtain information from both younger and older generations, the recruited FGD participants were grouped according to age (younger than 35 or older than 35).

Respondent sampling

Quantitative interviews

A total of 400 face-to-face interviews with an equal number of men and women were completed for the quantitative module of the research. The sample was drawn using a stratified sampling approach, with the same number of interviews completed in each enumeration area. The table below details the gender breakdown in each surveyed township.

Table 4 - Gender distribution of quantitative interview respondents

Township	Men	Women	Total
Tonzang	15	15	30
Kanpalet	15	15	30
Matupi	20	20	40
Mindat	15	15	30
Falam	20	20	40
Thantlang	15	15	30
Hakha	20	20	40
Tedim	30	30	60
Kalay	50	50	100
Total	**200**	**200**	**400**

Respondents ranged from 15-84 years old. Of these 38% were aged 45 or older; 20% were 35-44; 20% were 25-34; and 22% were 24 or younger. The enumeration area and respondent selection ensure a representative sample distribution across all townships, as shown in the table below.

Close to one out of every 10 respondents has no formal education, and only one out of eight has more than a high school education. Table 6 shows the different education levels of respondents across the surveyed townships.

5 The Kish grid is a method for randomly selecting a member within a household to be interviewed. This is a widely used research sampling technique, where all household members are included in the grid and then one is randomly selected using a pre-determined algorithm to find the person to be interviewed in a household.

In terms of household income, close to half (43%) of the respondents reported a monthly income of MMK 25,000-150,000 (US$16–98); 28% reported a monthly income above MMK 300,000 (US$196); and 6% reported an income of less than MMK 25,000 (US$16) per month. Respondents had mixed Chin ethnic backgrounds with 20% of the surveyed respondents Hakha, 17% Tedim, 20% Falam, 10% Matupi and the others a variety of other Chin ethnicities.

Weight

The sampling approach applied for this research produced a representative sample of respondents proportional to the population. However, some groups in our collected sample were over or under-represented. The final data was thus weighted to correct imperfections in the sample that could lead to bias and/or major differences between the sample and the population it represents. Weighting is a common practice in statistical tests and provides a more accurate description of the population. Imperfections in the sample largely

Table 5 – Age groupings for quantitative interview respondents

Township	15- 24	25 - 34	35 - 44	45 - 54	55 +	Total
Tonzang	8	7	6	4	5	30
Kanpalet	5	8	10	3	4	30
Matupi	10	7	6	5	12	40
Mindat	6	6	9	5	4	30
Falam	13	8	7	6	6	40
Thantlang	4	8	5	7	6	30
Hakha	11	6	8	4	11	40
Tedim	9	16	10	10	15	60
Kalay	20	15	18	19	28	100
Total	**86**	**81**	**79**	**63**	**91**	**400**

Table 6 – Education levels of quantitative interview respondents

Township	No formal education	Primary school	Middle school	High school	Higher education	Total
Tonzang	1	10	11	8	0	30
Kanpalet	5	12	3	7	3	30
Matupi	4	7	9	12	8	40
Mindat	2	10	8	8	2	30
Falam	2	10	9	9	10	40
Thantlang	6	7	7	7	3	30
Hakha	2	9	6	20	3	40
Tedim	3	17	20	18	2	60
Kalay	13	21	19	29	18	100
Total	**38**	**103**	**92**	**118**	**49**	**400**

resulted from the selection of respondents with unequal probabilities. These unequal probabilities are most often the result of a certain demographic group not being present at the time of the interviews or an atypically large number of one demographic group present in a sampled village.

In order to make the results representative of the true proportion of urban and rural populations, as well as of men and women and different age groups living in the sampled townships, weights were used to adjust the sample distribution for these key variables. The weighted data is shown according to real proportions in the Chin population; the collected data figures have changed slightly due to the applied weights.

Six FGDs were conducted, three of them for Chin under 35, and three for Chin over 35. With a view to selecting people who have regular access to at least one type of media source, the selection of participants for the FGDs was purposive in nature. Maximum variation was sought to ensure a balance with regards to media usage and gender in each focus group. The table below details the age range and women/men ratio for each group.

Limitations of the study

CONDUCTING research in Chin State is often difficult due to the mountainous terrain, poor road conditions, and limited access to remote locations, especially during the monsoon season. The main issues encountered during the data collection phase of this particular research project included transportation (poor roads and vehicles that hindered access to more remote rural areas) and the small number of households – in some cases fewer than 20 - in some of the rural villages.

Focus group discussion held in Falam, Chin State (May 2019)

Table 7 – Weighted demographics

	Urban/Rural		Gender of the respondent		Age Group				
	Urban	Rural	Male	Female	15- 24	25 - 34	35 - 44	45 - 54	55 +
Total unweighted	32.5%	67.5%	50.0%	50.0%	21.50%	20.25%	19.75%	15.75%	22.75%
Total weighted	30.7%	69.3%	46.6%	53.4%	27.74%	20.88%	18.34%	15.41%	17.63%

Additionally, the impact of the ongoing conflict between the Arakan Army (AA) and Tatmadaw military posts in areas bordering Rakhine State in southern Chin presented security concerns. Although the original plan was to conduct research in all of the Chin State townships, Paletwa Township was not considered secure and was therefore excluded.

Because of the transportation, sampling and security limitations of the research, four rural enumeration areas had to be substituted during data collection (see Table 9).

The FGDs were conducted in the most populous townships in Chin State (Falam, Tedim) and in Sagaing Region (Kalay). They provide important insights and confirm collected quantitative data. It is possible that FGDs conducted in more remote townships would have elicited different responses.

It should also be noted that the complex subject matter of the research topic and the related technical vocabulary presented some challenges during the interviews. While well-known media platforms such as print and television were easy to distinguish and discuss, understanding differences between less consumed platforms – for example, digital platforms such as online TV, online radio and websites – proved more difficult. Questions about community radio channels that are only available online, for example, may, in some cases, have been challenging, with some respondents potentially equating community radio with other radio channels available in their communities, including FM radio (which are joint private-state ventures) and Myanma Athan Radio (state). Bagan FM and Thazin FM, for example, broadcast in Chin State; interviewees also referenced listening to Cherry FM and Shwe FM. However, the local population in Hakha often refers to FM radio

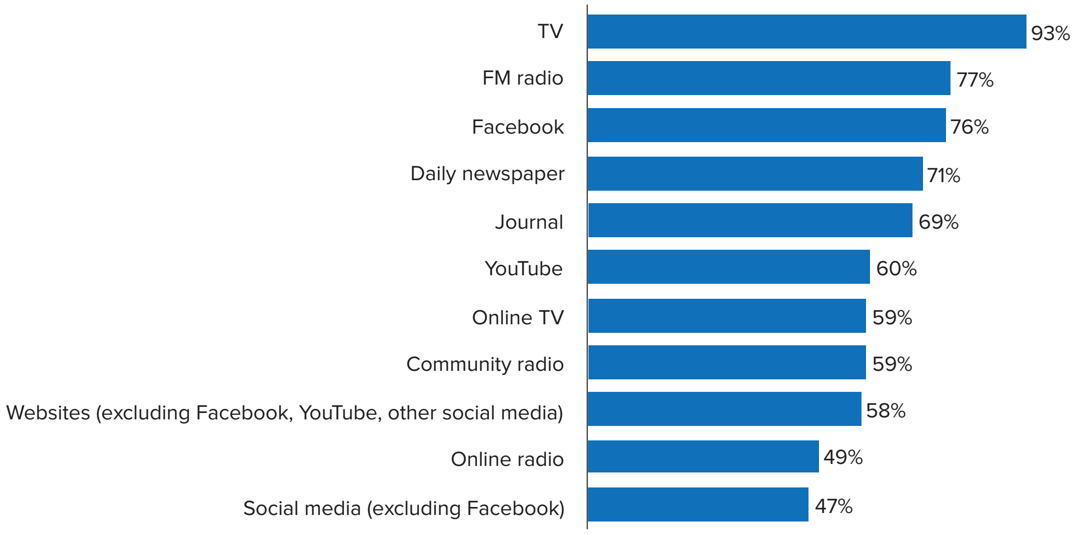
Table 8 –FGD participants

No.	FGD types	Number of participants	Women/Men	Urban/ rural	Township
1	Under 35	8	3/5	Urban	Kalay
2	Over 35	6	2/4	Rural	Kalay
3	Under 35	7	3/4	Rural	Tedim
4	Over 35	8	4/4	Urban	Tedim
5	Under 35	8	4/4	Urban	Falam
6	Over 35	6	3/3	Rural	Falam

Table 9 - Substituted enumeration areas

No	Township	Urban (ward)	Rural (village)	Substituted village track
1	Kanpalet	No (2) Ward	Pu Saw	Ngon Laung
2	Falam (Rihkhuadal ST)	Phathauk Ward	Murang	Vangva
3	Matupi (includes Reazu ST)	Lungvan Ward	Lailengte	Leikan (Rezua ST)
4			Sapaw	Ramting

Chart 1 – Percentage of the Chin population citing access to media platforms*



n=400 [6]

when it is, in fact, listening to broadcasts from Mizorum, India. While these misunderstandings might have influenced some of the data collection, including, for example, the different access rates cited by respondents for different online sources, MSR researchers say the impact would have been minimal. For more analysis of this topic, please refer to the methodology section of this report.

FINDINGS

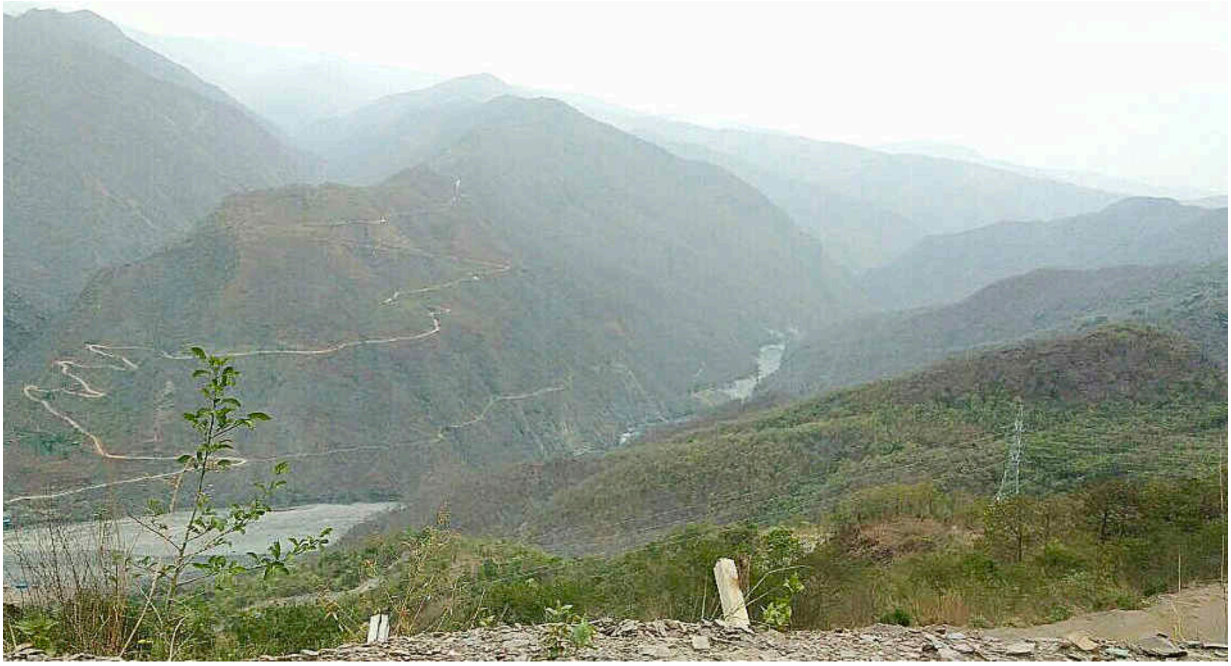
Media accessibility

BASED on the research findings, the Chin population has access to various media platforms, with notable differences in access between rural and urban locations and different age groups. The majority of the Chin population has access to free-to-Air or satellite TV in either their own homes or other places (93%), followed by FM radio (77%), Facebook (76%), daily newspapers (71%), and journals (69%). It is important to note that this part of the research is looking at access only, rather than actual media usage.

As an internet connection and data are needed to access all online platforms, Facebook, YouTube, online TV and radio, and other social media are all in theory equally accessible. Yet the research findings show that online platforms such as Facebook and YouTube have higher cited access rates than other social media and online radio. These findings raise an important question: does the surveyed population choose not to access them, or do they not know how to access them? The overwhelming popularity of Facebook in Myanmar, including Chin State, is an important consideration: most people want to be on it since everyone else is.

As well, some mobile phone operators used to allow customers to access a limited version of Facebook (known as Facebook Basics) without data charges. This "free-data' scheme enabled users to look at the Facebook newsfeed, but not to view items that required a large quantity of data such as photographs and videos. Most mobile phone shops also tend to pre-install the Facebook app and pre-create Facebook accounts for mobile

6 Websites in this chart do not include the other specifically mentioned online sources such as social media, Facebook, YouTube, online TV.



phone customers. The Facebook app is also very simple to use; whereas many websites are more difficult to view and read on a mobile phone screen, the Facebook app is mobile-friendly. The MSR enumerators also observed that some interviewees seemed unaware that they could access other digital platforms such as online TV, online radio, YouTube and websites, whether by using an internet browser or another app.

Television

A majority of the Chin population has access to a television, with 76% having access outside of their home and almost two-thirds (61%) having a television in their own homes. The numbers differ, however, for rural and urban populations. Less than half of rural area households have a television in their own homes (48%), though many can access television in other locations (77%). By comparison, 89% of the urban population has their own television at home and 71% also has access outside their house.

A slightly higher proportion of male respondents have access to a television at home (62%) compared to women (60%). This difference is not significant and does not mean that males have more access in general. There is a correlation between the level of education a person has and ownership or access to a television in one's own home: 59% of Chin who do not have a formal education have access to a television in their home compared to 86% of those with a university degree. These findings point to a correlation between higher income levels and higher education, and television ownership or access to a television at home. According to the FGD participants, many households have satellite television, and those that do not have it want it. As a 29-year-old woman FGD participant from rural Tedim working as a writer noted: "About 180 houses (in my village) have satellite TV. If there was a regular electricity supply, every house would install it."

Access to online television is much lower: only half of the Chin population cites access to online television, with a higher access rate cited in urban than rural areas. As internet, and thus online television, is more accessible in urban areas, this finding is not surprising. Fifty-nine percent of the younger age group say they access online television at home, with the percentage sharply dropping among older people.

Radio

A significant majority (77%) say they can access FM radio, either at home or in other places, while slightly less than half (49%) cite access to online radio. While there is no discernible difference between men and women, younger and more educated people cite a higher access rate to radio overall. As rural areas have more limited connectivity and electricity supplies, they are again disadvantaged in terms of access to internet when compared to urban centers, but not so when it comes to radio. This finding is supported by the FDGS: as a 34-year-old government worker from an urban area of Falam noted: "When you are in a rural area, you cannot access the internet and so you have to rely on FM radio to access news."

As online radio uses costly data and can take time to access, FGD respondents say they would listen to local radio more if it were accessible via FM stations. They point to at least three community stations in Chin State that are waiting for a broadcasting permit, yet as the broadcasting law is not yet operational, for the moment they operate solely online. In Tedim Township, for example, there are currently two online community radio stations - Phualva FM and Heisa FM – that are available via Facebook and Soundcloud. (Although they call themselves FM, they are online and thus not actually broadcast on the FM spectrum.)

Print media

A majority of the Chin population (71%) has access to some form of daily newspaper, whether national or local, either at home or in public places. When you disaggregate the data, however, the numbers show that the rural population has less access (at 65%) when compared to the urban population (at 82%).

Accessibility rates for print journals (of varying frequencies, other than daily) are also high, with 69% of the overall population able to access them, and one-third able to access them in their own homes. The young and highly educated have the greatest access, and 83% of the urban population has access compared to only 63% of the rural population.

Even taking into account the urban-rural differences, given the mountainous terrain in Chin state, the relatively high level of access to print media that the survey confirms is surprising and at first glance could suggest a higher level of information availability than is actually the case. In fact, even if accessibility is quite high, the difficulty reaching some of the more remote townships, especially during the May-October rainy season, means that print media content is often out of date by the time it reaches its audience. As a 29-year-old woman university graduate from a rural area of Tedim who participated in an FGD observed: "We do not usually get updated journals and magazines. They usually come late...at least one or two weeks. Sometimes, it takes one month. So people are not very interested in [print media] and as everyone has a phone, they mostly use their phones."

According to the research findings, people who cite access to print media, and who regularly read it, usually buy door-to-door subscriptions (32%), or else obtain copies from friends (36%). Less than half read them in public places (15%) or buy them from a news agent (14%). Very few access print media in tea houses (3%), which is probably the result of print media not being available, although there is no data to support that assumption.

There are clear differences in access in rural and urban areas, according to gender, and among different age groups. Whereas friends are the main source of print media for regular readers from rural areas (45%), almost half of the urban population that reads print media on a regular basis has a subscription (47%). The majority of men who are regular readers have subscriptions (39%), while friends are the main source for women (43%).

Forty-nine percent of 15-24-year-olds borrow their newspapers or journals from friends, while 33% of 25-34-year-olds buy them from a news agent. By comparison, 33% of 35-44-year-olds and 37% of 45-54-year-olds obtain them from a friend or have a subscription, while half of the 55+ age group that reads print media on a regular basis has a subscription (51%).

Digital media

Fifty-eight percent of the Chin population has access to websites and 59% to YouTube, as compared to 76% to Facebook. This speaks to Facebook's enormous popularity throughout Myanmar, and the Facebook app's popularity as the primary portal for accessing content, including content produced on other platforms.

Slightly more than three-quarters (76%) of the urban population cite regular access to websites, compared to 51% of the rural population. There is also a clear correlation between age and access to websites: 82% of 15-24-year-olds cite access to websites, as compared to only 37% of those aged 55 and older. Education is also a factor: a third of people with no formal education cite access (38%), compared to 81% of the people with a university degree. As a 34-year-old university-educated urban man working for the government in Falam who participated in an FGD noted: *"I can easily access internet at work. If I want to know something, I use internet to get information and search websites."* By contrast, limited connectivity, especially in rural areas, is a hindrance to higher internet usage. Bad connections in mountainous areas are especially common and also account for the lower user rates in rural areas, despite the popularity of digital platforms.

YouTube

More than half of the Chin population (60%) cites access to YouTube, either at home or in other places although, once again, there is an urban-rural divide: 73% of urban users cites access, compared to 51% of rural respondents. According to a 34-year old male government worker who participated in the FGD in Falam, however, barriers also exist in urban areas: "In order to access YouTube, I need excellent internet connection which I don't need for Facebook. Even if YouTube cannot be loaded, I can always use Facebook. "

There is a difference between perceived and/or cited levels of access between men and women: 68% of men have access to YouTube, as compared to 53% of women. Eighty percent of 15-24-year-olds confirm they have access to YouTube and, consistent with other findings, the level of access decreases the older you get. The research also found a significant disparity between different education levels, with 30% of the population with no formal education having access to YouTube, compared to 48% for those with primary school education, 57%, with a middle school degree, 73%, with a high school diploma, and 86%, with higher education.

Mobile phones

Almost everyone who accesses the internet does so via a mobile phone (96%); very few use a tablet (7%), laptop (5%) or desktop computer (1%)[7]. Most people use their phones to watch videos (77%) and only a few send emails (27%) or post comments on a blog or news site (24%).

The most popular messaging apps are Facebook Messenger (57%) followed by Viber (29%). As expected, there is a correlation between age and the use of apps such as Facebook, with 86% of 15-24-year-olds using Messenger as compared to 19% in the 55+ age group. There is a similar correlation between education and usage of messaging/chat apps: only 23% of those with no formal education use Facebook Messenger, as compared to 81% with a university degree.

7 56% of households in Chin State own at least one mobile phone; 48% of these households have at least one smart phone. World Bank Myanmar Living Conditions Survey 2017 report.

Barriers to access

According to FGD participants, limited electricity access is one of the main barriers to accessing media platforms, including television, radio, and online. Limited connectivity, especially in rural areas, is the second. Cost is also an important factor. As a 34-year-old man who works for the government and lives in an urban area of Falam Township noted during one of the FDGs: "It is now easier to pay for television services as the company agents come to our homes to collect the money directly. So access to media like satellite television still largely depends on your ability to afford the fees, and not everyone can afford it".

The majority of the rural population does not pay for access to television (71% do not pay and 14% say someone else is paying), whereas in urban areas, where incomes tend to be higher, 40% watch pay tv channels, with monthly fees averaging MMK 5,000-10,000 (US$3–6).

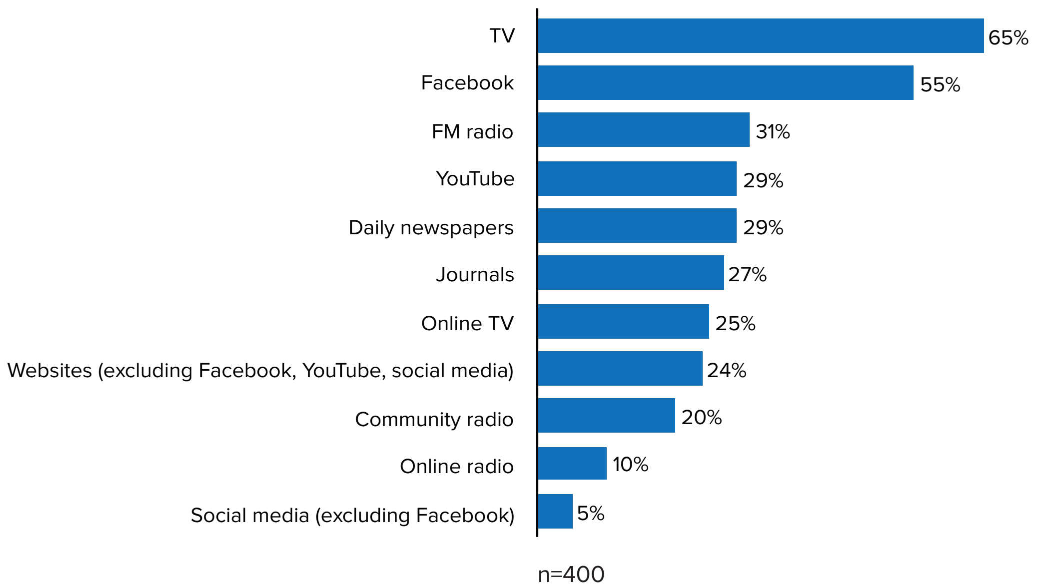
More than a third of the population reads newspapers and journals for free (34%), another third (30%) says someone else is paying for it and only 36% pay for print media themselves, spending less than MMK 5,000 (US$3) per month on average.

Most Chin who use the internet regularly spend MMK 5,000 -10,000 (US$3-6) per month on it, and a third of Chin spend less than MMK 5,000 (US$3) per month. How satisfied the consumers are with the cost of accessing news and information depends on the platform: radio (82%), print media (79%), television (77%), websites (65%) and social media (53%).

Access to different types of information varies. A fairly high percentage of Chin respondents do not believe they are able to easily access information about Myanmar (45%), the rest of the world (43%), local communities (37%), Southeast Asia (37%), international perspectives on Myanmar events (36%), or local (state/region) news (35%). According to a 29 year old woman from a rural area of Tedim who participated in a FDG, local news sources can be accessed more quickly: "It is hard for newspapers like Myanma Alinn to be delivered here. Since local journals are delivered faster, I read them more."

As we see below, while access to news and information largely depends on location and income, it does not necessarily equate with actual consumption.

Chart 2 - Platforms consumed on a regular (daily, weekly, monthly) basis



Media consumption

Most of the Chin population in Chin State and Kalay, Sagaing Region, has access to free-to-Air television. It is also the most regularly consumed platform, with 65% viewing television programs on a daily, weekly or monthly basis.

The research found, however, that while 77% of the population cite access to FM radio, only 31% regularly listen to it. Similarly, although 71% of the population can access print media, actual consumption is low, at 29% for daily newspapers and 27% for journals (frequencies other than daily).

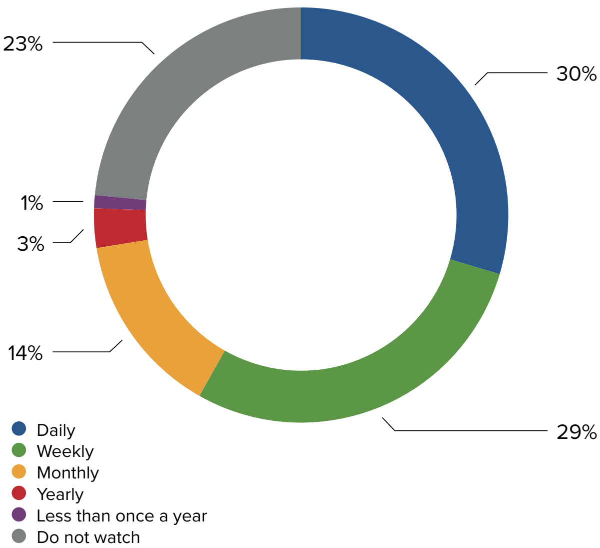
The most popular online platforms in terms of consumption are Facebook (55%), YouTube (29%), online television (25%), websites (other than the specific ones mentioned in this list) (24%), online radio (10%) and other social media (5%).

Television consumption

Ninety-three percent of those surveyed say they can access free-to-air television. Of those, 70% watch it regularly, with one-third watching television programs daily, a quarter, weekly, and 14%, monthly. However, 23% of those that have access to television say they do not watch it.

While almost half of the urban Chin population watches television daily, in rural areas that figure drops to 21%. The notable difference in viewership rates between urban and rural areas can, in part, be explained by the more limited availability of electricity in rural areas. However, access to electricity in urban areas was also cited by FDG participants from urban areas as restricting access to television. According to a 39-year-old farmer from Tedim: "*I watch television when I have free time, when I am bored, and when there is electricity. That happens about every 3 days.*"

Chart 3 – Frequency of television viewership[8]



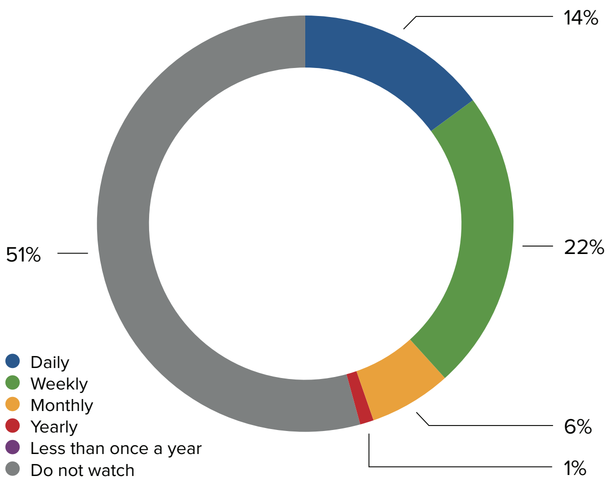
n=373

Sixty-five percent of people aged 15-24 watch television at least once a week, while 25-34-year-olds (55%) and 35–44-year-olds (44%) watch it less regularly. Television viewing increases among older age groups, with 60% of the 45–54-year-old age group viewing it at least once a week.

There is a clear correlation between education and the frequency of television viewership. People who have a university education view television more regularly (94%) than people with no formal education (41%). People with higher education can more easily afford to have a television in their own homes, whereas people with no formal education are less likely to own a television and have to access it in places outside of their homes.

8 The sample number in this chart is not n=400, as only respondents that cited access to television were asked about the frequency with which they view it.

Chart 4 – Frequency of online TV viewership[9]



n=234

The most viewed television channels are all national and include the state/private joint venture MRTV-4 (36%), state-owned MRTV (25%), and the privately-owned Channel 7 (25%). The military-owned Myawaddy channel is also popular in rural areas, while urban populations also watch the privately-owned Mahar TV and MNTV. There are few, if any, major differences across the different age groups. One exception is that 45-54-year-olds like to watch the privately-owned satellite channel DVB (29%), and older people (55+) prefer the military-owned channel Myawaddy (22%) to Channel 7 (18%). People with no formal education prefer MRTV-4, Mahar TV and DVB, while those with the highest education levels prefer a wide variety of channels, including DVB, MRTV Entertainment and MNTV, in addition to the three most popular channels MRTV-4, MRTV and Channel 7.

More than half of the people who say they can access online TV do not watch it. According to a 57-year-old farmer and FGD participant from rural Kalay: "There are only a few people who watch online TV. Some people say that it is costly. Some people may not know how to access the programs." The youngest more tech-savvy generation accesses and watches online TV more regularly (61%) than those aged 55 and older (18%).

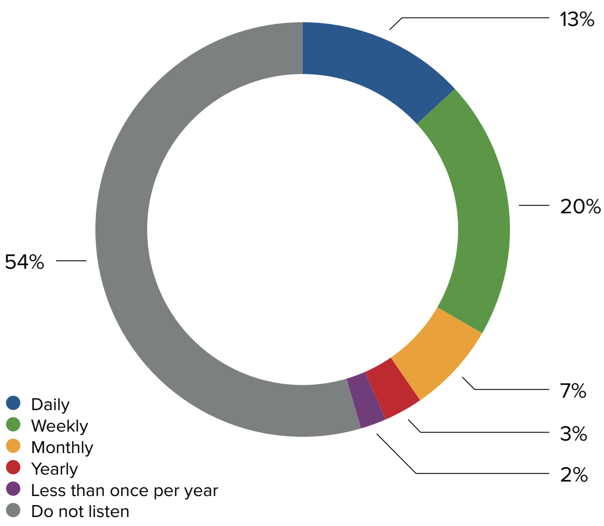
Radio

The ability to access radio is comparatively higher than many other platforms (77%), yet only a third of the people who can do so say they regularly listen to it (at least once a week), while more than half say they never tune in. There are no major differences between rural and urban locations in terms of listenership. Men tend to listen to the radio more regularly than women, while older people most commonly use the radio as an information platform, with a majority of the 55+ generation listening to the radio every day.

The state-owned Voice of Myanmar (Myanma Athan Radio) is the most popular radio station (30%), followed by the international public service broadcaster BBC Burmese Service (24%), and the state/private joint venture Shwe FM (17%). There is no notable difference in the frequency of listening across the different age ranges; younger listeners do, however, prefer Voice of Myanmar, Shwe FM and Cherry FM (also state/private joint venture stations), while older people prefer Voice of Myanmar (Myanma Athan Radio), BBC Burmese Service and VOA Burmese (international broadcasters).

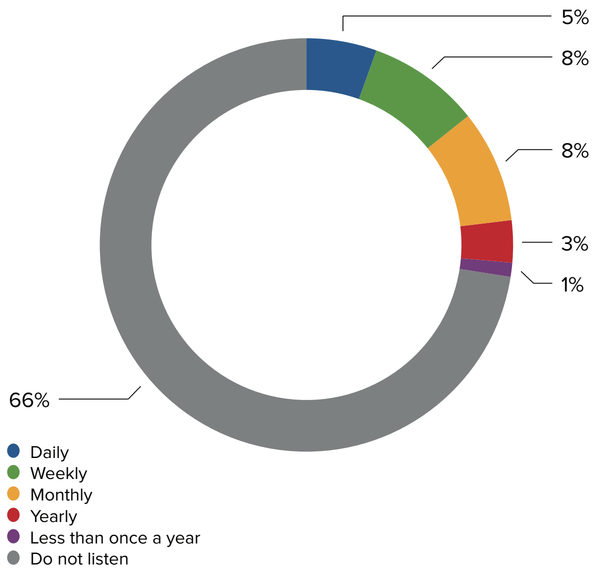
9 The sample number in this chart is not n=400, as only respondents that cited access to online television were asked about the frequency with which they view it.

Chart 5 – Frequency of FM radio listenership[10]



n=307

Chart 6 – Frequency of online radio listenership[11]



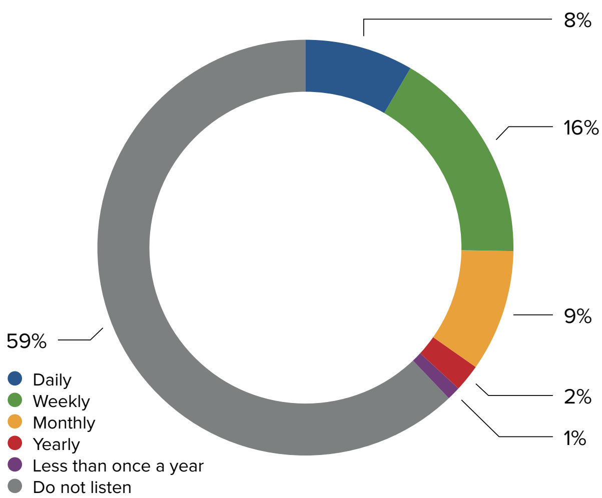
n=194

Whereas most men tend to listen to the three most popular stations cited above, women say they regularly listen to a wider array of stations. More educated people listen to Voice of Myanmar and Shwe FM but are not interested in BBC Burmese Service and people with no formal education prefer Voice of Myanmar and BBC Burmese Service.

Comments from FGD respondents regarding FM radio included criticism of the lack of variety of stations and the long waiting period for licenses for new stations, including local ones.

Twenty-one percent of Chin who cite accessibility to online radio regularly listen to it, including slightly more men and younger people.

Chart 7 – Frequency of community radio listenership[12]



n=234

10 The sample in this chart is not n=400, as only respondents that cited access to FM radio were asked about the frequency of use.

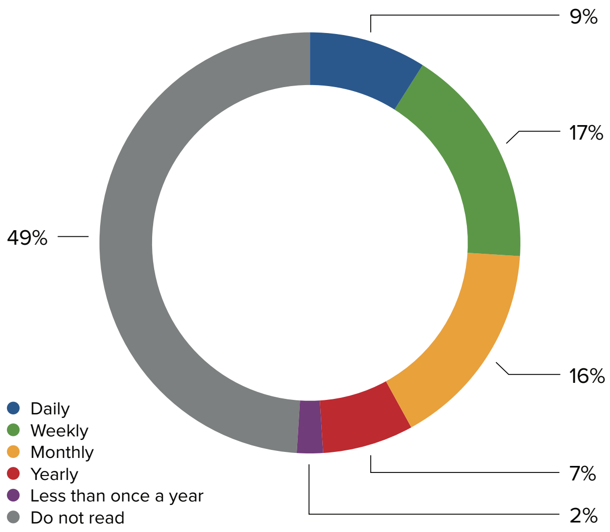
11 The sample number in this chart is not n=400, as only respondents that cited access to online radio were asked about the frequency of use of it.

12 The sample in this chart is not n=400, as only respondents that cited access to community radio were asked about the frequency of use.

Unsurprisingly, the same percentage of the Chin population cites access to community radio and online radio (59%), as community radio is currently only accessible online. Yet while 21% of Chin citing access to online radio listen to it regularly, 33% citing access to community radio listen to it regularly. According to FGD respondents, community radio is popular because it broadcasts in Chin languages. As a 21-year-old woman shopkeeper with some university education from urban Kalay mentions "There are otherwise not many radio channels that are available in Chin language."

Print Media

Chart 8 – Frequency of daily newspaper readership[13]

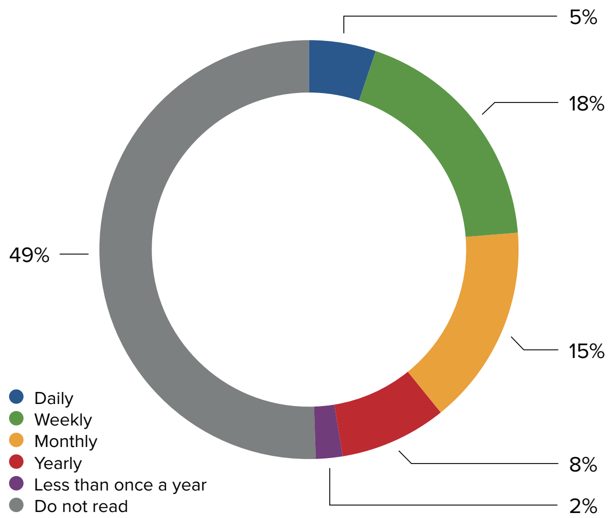


n=282

With news and information now accessible via mobile phones, the consumption of print media is declining according to FGD respondents, with a 60-year-old male farmer from rural Kalay noting: "Now that smart phones are available, I read fewer newspapers. Since mobile phones are available, there is no demand for Chin printed papers anymore, so the publishing has gone down." Only 42% of the population that cites access to daily newspapers actually reads them, with young, urban, highly educated men reading them more regularly than other groups. Various local print media are available in Chin State and in Kalay, Sagaing Region (see the Appendix). Among those that cite an ability to access newspapers (71%) and journals (69%), the most popular local daily newspapers are the privately-owned The Chinland Post, The Hakha Post and Chinland Herald. The most popular national newspapers are the state-owned Kyemon and Myanmar Alin dailies, and the privately-owned 7 Day Daily and Daily Eleven newspapers.

The most popular local private journals include the Zomi Voice, Tedim Times and The Chin Voice, which the majority say they still read in print rather than online, although The Chin Voice is no longer available in print. Overall, 38% of the Chin population with access to journals reads them on a regular basis (daily, weekly, monthly) and almost half (49%) of the population with access does not read them, as indicated by Chart 9.

Chart 9 – Frequency of journal readership[14]



n=276

13 The sample in this chart is not n=400, as only respondents that cited access to daily newspapers were asked about the frequency of reading them.

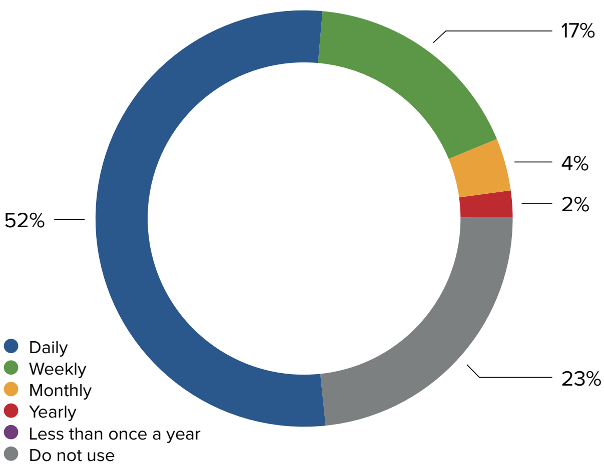
14 The sample in this chart is not n=400, as only respondents that cited access to (weekly) journals were asked about the frequency of reading them.

That two out of three of the most popular papers are local suggests a desire for local and timely news. The privately owned Zomi Times is popular with 25–34-year-olds, while the older generation, as well as those with a middle school degree and the most educated, prefer the state-owned Kyemon daily. Respondents with no formal education prefer the local, privately-owned The Chinland Herald, and two privately-owned national publications, Hmu Khin (Crime Journal), and Inn Arr (a sports publication).

Digital media sources

The urban population (80%) uses Facebook more regularly than the rural population (68%), woman (73%) and men (72%) cite almost exactly the same usage rates.

Chart 10 – Frequency of Facebook use[15]

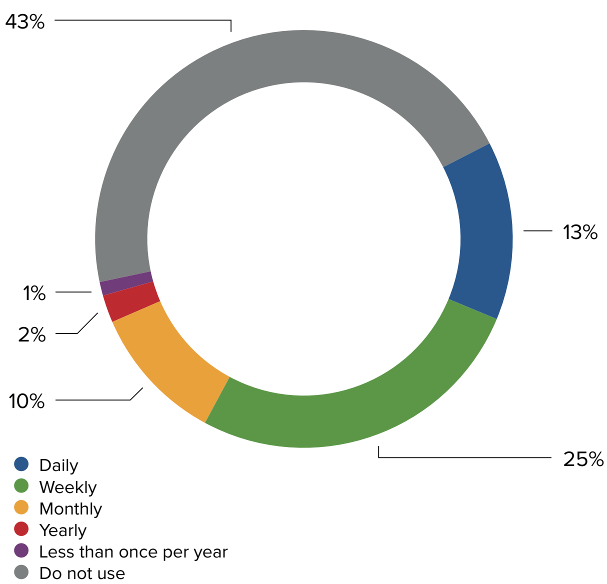


n=304

There is a strong correlation between Facebook use and age, with 74% of people aged 15 to 24 using it every day as compared to only 22% of those 55 and older. Whereas 51% of people with no formal education regularly use Facebook, only a fifth of primary school graduates, a third of middle school graduates, and a third of people with higher education, regularly use it. By comparison, social media platforms other than Facebook and YouTube are less popular: only 5% of the overall Chin population regularly uses other social media platforms, with young, urban people with an university degree being the most regular users. Facebook users mostly follow friends (80%), family (66%) and news pages (40%), and therefore consume whatever these sources post on their walls or share in private messages.

The advantages of Facebook and social media that were cited include its immediate and portable nature, and the fact that it can be viewed almost anywhere, including while working, in school or at home. As a 29-year-old women writer in a rural area in Tedim township who participated in an FDG notes: "We can look at all the news Facebook friends upload. I can see all the news about Tedim Township on the Facebook page of the Tedim Times. So, it's faster than other [sources]."

Chart 11 – Frequency of YouTube use[16]



n=239

15 The sample in this chart is not n=400, as only respondents that cited access to Facebook were asked about the frequency of using it.

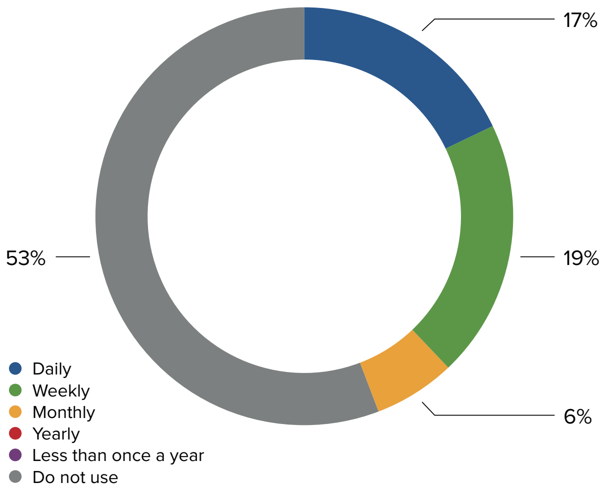
16 The sample in this chart is not n=400, as only respondents that cited access to YouTube were asked about the frequency of using it.

While more than half of Chin say they can access YouTube (60%), 48% of those citing access regularly use it. Of the group regularly using it, the majority listens to music or watches music videos (77%), and views movies and documentaries (51%), while 21% watches news.

There is no discernible difference in terms of preferred content for rural and urban populations. Unsurprisingly, 15-24-year-olds use YouTube the most, mainly listening to, or watching, music. A government employee from an urban part of Falam township who participated in an FGD says there are, nonetheless, challenges: "The Facebook newsfeed can be loaded even if the internet connection is slow, but for YouTube, you need an excellent internet connection. So, if we want to watch anything on YouTube, we have to be patient."

Forty-two percent of the Chin population that cites access to websites (excluding specific online sources referenced in the survey, including Facebook, YouTube, other social media, and online TV) visits them regularly (daily, weekly or monthly basis). When asked specifically about the consumption of local news online, only a small percentage of the population cites visiting local news websites on daily, weekly or monthly basis (13%), with young (23%), urban (23%), highly educated (30%) men (15%) being the most regular visitors, and 55+ (3%), rural (8%), Chin with a primary school education (3%), and women (11%) being the least regular visitors. The most popular local news websites cited are The Hakha Post, The Chinland Post and Chin World, regardless of gender, age, education or location. The 55+ age group is the sole exception, with a preference for the Lairwan Post. The Tedim Times is accessed by only a small percentage of the population online (8%) but is preferred by rural populations (13%), young people (14%), and Chin with no formal education (78%).

Chart 12 – Frequency of local news website use[17]



n=233

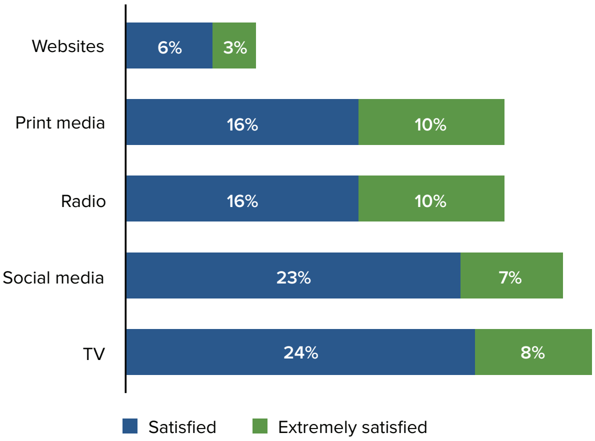
News consumption

As news and information are readily available via online platforms, the majority of the population (72%) uses mobile phones to access them. As a 48-year-old urban housewife from Tedim who participated in an FDG explains: "A phone is easy to carry. If we want to read many different kinds of news, we can do that easily on our phones. I can search for everything I want in the search box. I think people like that, and they use it a lot."

More people in urban settings (80%) use their phones to access news than in rural areas (68%), with slightly more men doing so (76%) than women (68%). As expected, there is a strong correlation between age and the use of phones to access online news outlets: 93% of Chin youth access news via their phones, much more than the 55+ age group. There is also a correlation between education levels and the use of mobile phones to access media platforms, with 39% of the population with no education using a phone to access news, compared to 92% of people with a high school diploma.

17 The sample in this chart is not n=400, as only respondents that cited access to local news websites were asked about the frequency of using it.

Chart 13 – News content satisfaction levels



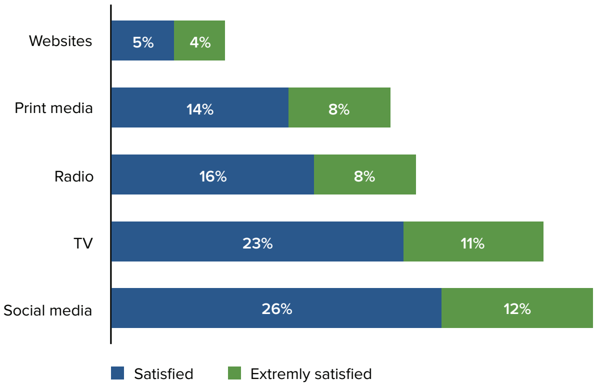
n=400

According to the research findings, the Chin population has relatively low satisfaction levels with respect to news content. Of the different platforms, respondents were most satisfied with television news content (32% either satisfied or very satisfied), followed closely by social media (30% either satisfied or very satisfied). Radio and print media were seen to be providing satisfactory or very satisfactory news content by 26% of the overall respondents. Local website news had the poorest performance, with only 9% of overall respondents being either satisfied or very satisfied with their news content provision.

When only taking into account the satisfaction level of the respondents that access news items regularly (daily, weekly or or monthly), the numbers are, however, different than that of the overall population. Regular radio news listeners cite an overall high satisfaction level, with 75% of radio listeners being satisfied, followed closely by print media readers (73%), website consumers (73%) and television (71%). Although only a small percentage of the overall Chin population accesses websites to get local news (13%), most of the people that do so are satisfied with the content (73%). Slightly more than half of Facebook users are satisfied with the news content they find on that platform (54%). These numbers illustrate the comparatively high levels of trust that news consumers place in radio and print media, and the lower levels of satisfaction with Facebook news content.

Radio and print media are consumed less regularly than other media sources. In the case of print media, this is due, at least in part, to accessibility and timeliness. The general population is most satisfied with the timeliness of social media news (38%), followed by television (34%), radio (24%) and print media news (22%), and least satisfied with the timeliness of websites (9%).

Chart 14 – Satisfaction with timeliness of news



n=400

Although there is a low satisfaction rate vis-à-vis the timeliness of print media content when looking at the overall Chin population, print media consumers prefer print content to that of Facebook, largely because they consider it more accurate. As a 34-year-old urban man who works for the government in Falam and who participated in an FGD observes: "We can access newspapers after we have read news on Facebook. Newspapers are not as fast as Facebook, but newspapers provide more accurate news."

Discussions with FGD respondents indicate an awareness that news needs to be checked against other sources to validate or obtain a full picture. And while many print media also publish their content on Facebook, it is possible that trust drops when their content is mixed among content from other less reputable sources, including gossip. Many outlets also publish news online on websites and social media platforms, including Facebook; the small number of people that access news websites online largely choose local news websites.

The timeliness satisfaction levels of the respondents that access news items regularly (daily, weekly or monthly) differ: regular television news viewers are most satisfied with the timeliness of news and information (73%), followed by radio (69%), Facebook (68%), and print media (62%).

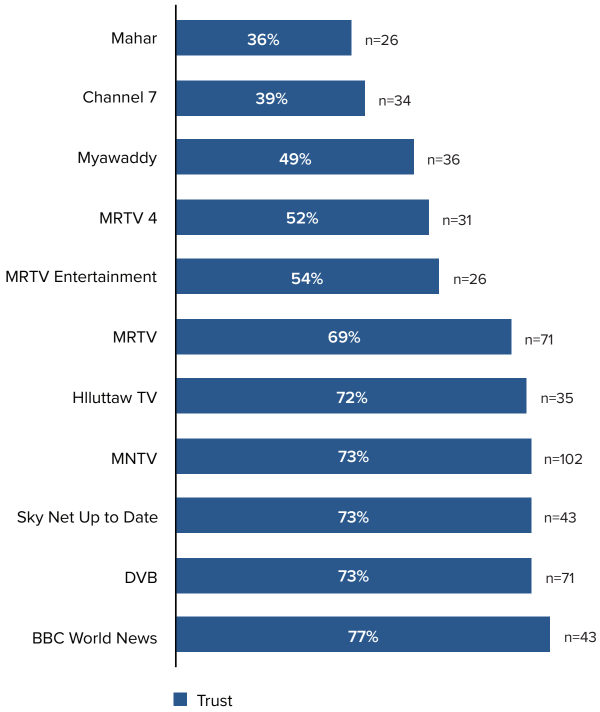
Trust

Based on the research findings, trust is built on reputation, and a news outlet's reputation is assessed on a story-by-story basis, by comparing its news and information with that of other outlets. A 34-year old urban male government employee from Falam who participated in an FGD explains his vetting process: "I need to evaluate news, such as how did the source report it and how did another source report the same thing. In terms of political news, we need to check the news and balance the information." Other FGD respondents noted the importance of individuals' social circles in disseminating news and information, and in determining their veracity. Information found on Facebook, for example, is compared to information published by other outlets and with information from people's trusted circles of friends and family.

Television

Television is the most popular media platform, with MRTV, MRTV4 and Channel 7 being the most popular channels. However, the most popular channels are not the ones most trusted by regular news consumers. MRTV, for example, was awarded a 69% trust rate by the 71 people who regularly watch this channel, while only half (52%) of the 102 regular consumers trust the news on MRTV4 and even fewer trust Channel 7 news (39%).

Chart 15 - Trust in television news[18]



Seventy-seven percent of respondents that view the news on BBC World News regularly trust their news, giving BBC the highest trust rate of all of the channels. DVB, Skynet's Up to Date, and MNTV are the next most trusted channels, at 73% each. Hluttaw TV comes next, with 72%, followed by MRTV (69%), MRTV Entertainment (54%), MRTV4 (54%), Myawaddy (49%), Channel 7 (39%) and Mahar (36%). Trust, however, does not correlate with popularity, indicating that viewers select their channels based on other factors, including, notably, entertainment and sports. The military-owned Myawaddy channel, for example, is one of the most popular channels for the rural population but less than half of news viewers trust its news. Similarly, the urban population watches Mahar regularly, even if they place greater trust in the news broadcast by other channels.

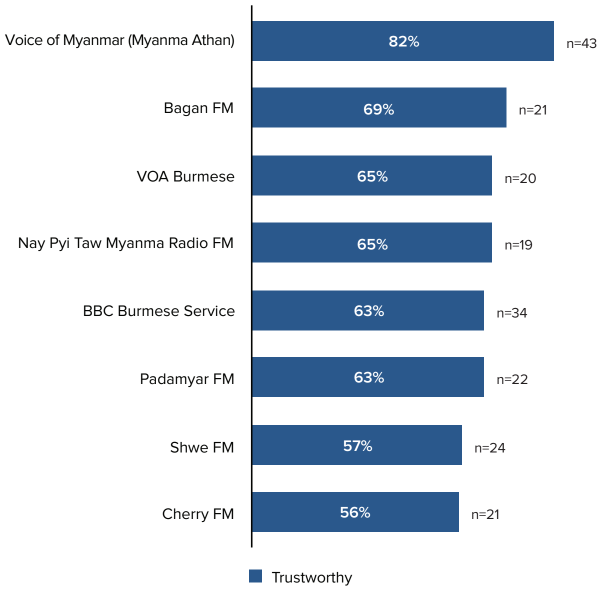
There are no major differences across age groups in terms of the popularity of channels, although 45-54-year-olds have a slightly higher preference

18 The sample in this and the following charts are relatively small, as only news viewers of specific channels were asked about their trust levels.

for DVB (29%), while the older age group prefers Myawaddy (22%) to Channel 7 (even if only a third of them find Myawaddy's news trustworthy). People with no formal education prefer MRTV4, Mahar TV and DVB, whereas the mostly highly educated prefer a wide variety of channels, including DVB, MRTV Entertainment and MNTV, in addition to their top 3 (MRTV 4, MRTV and Channel 7).

Radio

Chart 16 – Trust in radio news[19]

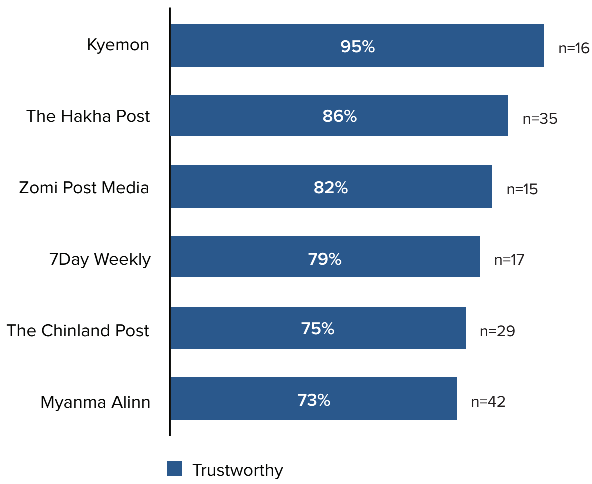


Although not as popular as television, 77% of the Chin population cites accessibility to FM radio. However, only a comparatively small percentage of the surveyed population listens to radio regularly (33%). A significant number of survey respondents trust the news and information content they hear on a variety of radio channels, as indicated in Chart 16. Focus group discussion respondents also consider radio news broadcasts to be reliable. Myanma Athan (Voice of Myanmar) is the most popular radio channel for respondents that regularly listen to radio news (daily, weekly or monthly), and also one of the most trusted, despite being state-owned: 82% of its regular news listeners (43 people) trust its content. BBC Burmese Service and VOA Burmese are ranked lower by their regular listeners with regards to trust (63% and 65%, respectively).

There is a high level of trust in the news broadcast by national state-owned broadcaster Myanma Athan (Voice of Myanmar) across all ages, education levels and genders. Half of Shwe FM listeners consider its news trustworthy, while two-thirds of people listening to the international broadcasters VOA Burmese and BBC Burmese Service trust their news content. Although many young people listen to Cherry FM (25%), only half of 15-24-year old listeners trust its news programming; this indicates that people listen to Shwe FM and Cherry FM for entertainment rather than news content. Both Shwe FM and Cherry FM are private-state joint ventures.

Print media

Chart 17 - Trust in print news[20]



Regular consumers of print media value it as a reliable news source. The most popular newspapers and journals are also the most trusted.

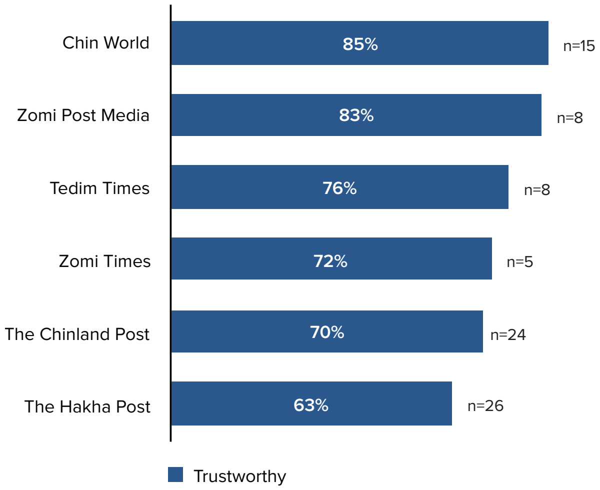
19 The sample in this chart is relatively small, as only news listeners of specific radio channels were asked about their trust levels.

20 The sample in this chart is relatively small, as only news readers of specific printed media were asked about their trust levels.

Digital

While only a small number of respondents cite access to local news websites (13%), those that do say they trust them.

Chart 18 - Trust in online news

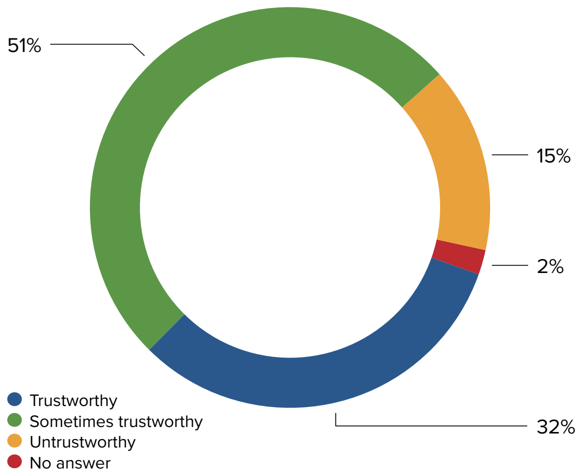


According to the research, the younger generation trusts the fully digital Chin World the most, and the older generation trusts The Hakha Post the most. When comparing the trust levels in local print versus local digital media, 63% of online Hakha Post readers trust its credibility, compared to 86% of those who read the print version.

Although only a handful of people use YouTube to access news, those who do find it trustworthy, although with significant differences among the various groups. Whereas 86% of urban news viewers say YouTube is a trusted platform for news content, only half of the rural population agrees with that assessment. There is a similar dissonance between men and women: whereas men don't place any trust in YouTube, women place significant faith in the validity of its news content.

Facebook

Chart 19 - Trust in Facebook news[21]



n=225

Compared to other media platforms, news content published on Facebook fares comparatively low in terms of trust rates, with only 32% of the people who access news on this platform trusting what they find, 51% sometimes trusting it, and 15% deeming its content untrustworthy. Urban men with no formal education who are aged 25-54 trust news content on Facebook the least. There is a general awareness of so-called fake news (disinformation, misinformation, propaganda) and the prevalence of untrustworthy sources on Facebook, and this is seen as the platform's major disadvantage. A young urban woman from Kalay township who runs an online business and who participated in an FGD shares her fears: "Some share their extreme thoughts about religion on the [platform] so some young people who are not even sixteen or eighteen may get the wrong idea."

21 The sample in this chart is relatively small, as only consumers of news available on Facebook were asked about their trust levels.

Ownership

Although FGD participants would like media to be more transparent and believe that some outlets are biased, influenced and protected by the government, FGD respondents say that only some media consumers know, or are interested in, ownership, with older people being the least aware, perhaps because for much of their lives the state-owned media was so dominant.

In reality, ownership does not significantly influence trust. Instead, perceptions are largely based on content and reporting styles rather than ownership. In the same way, people are more critical of individual aspects of a media operation than of the entire operation.

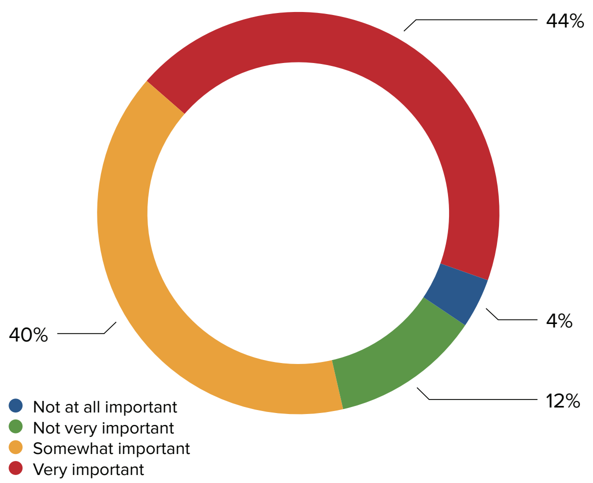
Whether a media source is local, national or international is nonetheless important. According to a 22-year-old urban man from Kalay Township who owns a shop and who participated in an FGD, it is “hard to believe international news posted by local media. When news about something happening in Kalay Township is posted on the internet, I search the source to confirm if it is true... and sometimes there are comments that reveal the news as false.”

The most popular and trusted radio stations are a mix of national and international, although news from international services like BBC Burmese Service (63%) and VOA Burmese (65%) are slightly less trusted than their national counterparts, such as Bagan FM (69%) and Myanma Athan (Voice of Myanmar) (82%).

News interests, preferences and information flows

Following the news is important to the majority of the Chin population (84%). Rural and urban populations find it equally important, as do men and women, and all age groups. While the 15–24-year-old group is the most interested (88%), even the least interested group, aged 55+, has a strong interest (79%). People with no formal education are the least interested (72%), while the most highly educated are the most interested (95%).

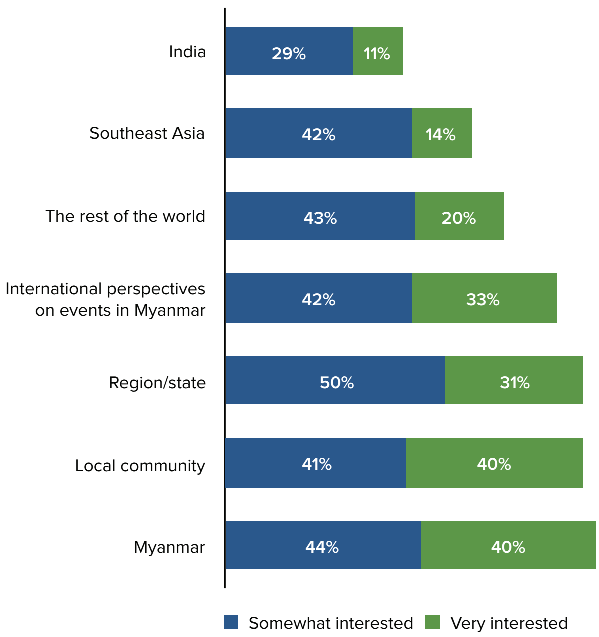
Chart 20 – Importance of following the news



n=400

News preferences

Chart 21 – Interest in news about:



n=400

The Chin population is most interested, either somewhat or very, in news about Myanmar (84%), followed by local Chin news (81%), region/state (81%), world (63%), South East Asia (56%), India (40%), Thailand (38%), China (38%) and Bangladesh (34%).

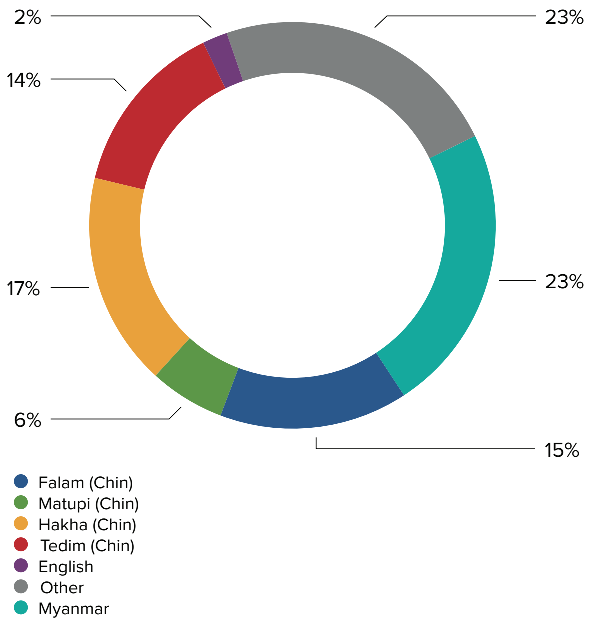
The most popular news content is on the topic of health (50%). This is followed by politics (37%), business (35%), social events (31%), sports (32%), and entertainment (18%). Young, educated, urban men are more interested in sports. Youth (15-24-year-olds) and those with more than a high school education have the greatest interest in entertainment, while the most educated also prefer health topics and politics.

The consumers of Facebook's newsfeed feature follow newsfeeds, like pages, and choose which pages they wish to see first. Media outlets' Facebook pages are often accessed on Facebook; however, many people also rely on their Facebook friends to provide relevant information. A few follow individuals for information, but individual pages are more typically followed for celebrity news than for political or national or local news. Most people say they engage with friends (80%), family (66%) and news pages (40%). Half of the urban, and a third of the rural, populations follow news pages, with no discernible differences between men and women or different age groups.

Young, educated urban women are the most significant followers of music and movie stars, whereas 35-44-year-old men follow athletes. Sixteen percent of the population, especially those aged 44-54 and middle school graduates, follow religious leaders. The most educated and the oldest are the most likely to follow intellectuals and political leaders. However, as a 29 year old urban woman from Kalay Township who owns an online shop and who participated in a FGD explains, preferences can change: "I really wanted to know about the celebrities before and I was also very interested in beauty bloggers. Now I am more interested in political news, both local and international."

FGD respondents are generally of the opinion that there is room for improvement at Myanmar's media outlets. Locally produced Chin print media is viewed as important for two main reasons: some local Chin media report in Chin languages (this is particularly important for older and less educated generations who are less fluent in Myanmar language), and local print media is generally more accessible with fewer distribution delays than national media outlets. National print media tend to arrive to both urban and rural locations in Chin State 2-5 days late, making their news out-of-date. But they are not the only ones dealing with delays; some outlets based in Chin State print their publications in Kalay or Mandalay and therefore face their own challenges with regards to timeliness.

Chart 22 - Preferred language(s) for news



n=400

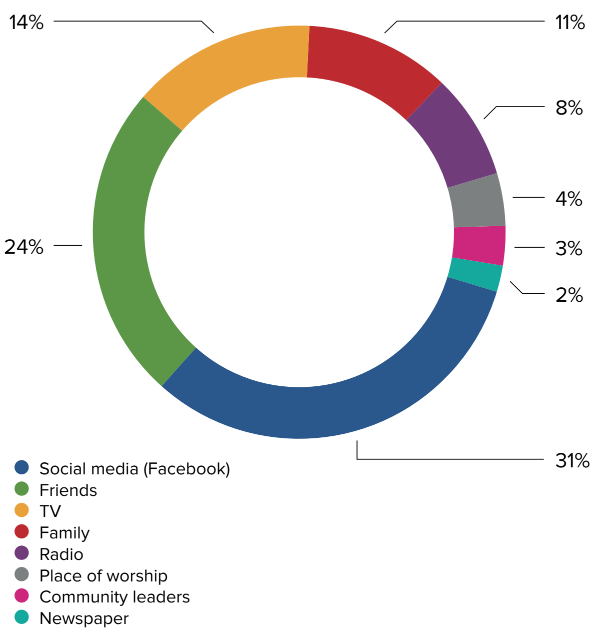
While 42% of the overall Chin population accesses news and information in Myanmar language, only 23% prefer this language. Fifty-two percent of survey respondents stated that they would prefer to access news in a Chin language.

That news and information in Myanmar language is more plentiful than in Chin languages is a challenge for those that are not fluent, including those with limited education and the older generation. A third of the rural population accesses news in Myanmar language; this figure rises to 57% for the urban population.

News and information sources

Despite its comparatively lower news consumption and trustworthiness rates, social media (including Facebook) is cited as the most popular platform for accessing news and information, with a third of the Chin population getting news from this platform (31%), followed by their friends (24%), and from television (14%). Twenty-eight percent of the rural population accesses information from social media, compared to 48% of the urban population, a disparity related to differing levels of connectivity and the availability of internet-enabled devices. Women obtain their news and information from social media (35%), friends (25%) and family (15%), whereas men obtain news and information from social media (33%), friends (27%) and television (13%).

Chart 23 - News and information sources



n=400

There is a correlation between age and news and information browsing and gathering. More than half of 15-24-year-olds obtain their news and information from social media, whereas only 14% of Chin aged 55+ uses this source. For the latter older group, friends, family and television are the most important news and information sources. A similar correlation can be found with regards to education; only 9% of people with no formal education use social media as a news and information source, compared to 53% of the most educated. The importance of Facebook is underlined by the fact that 34% get their information from this platform, compared to 6% from radio, their place of worship (3%), community leaders (3%) and newspapers (2%).

Among those who access news and information from personal sources, such as family, friends and other people from their community, the most common form of exchange is face-to-face (56%), followed by Facebook Messenger (29%), and phone conversations (21%). Those from urban areas, the young and the highly educated use Facebook Messenger, whereas other groups mainly have face-to-face conversations.

Generally-speaking, the Chin population does not like to share news with strangers, preferring to share and exchange with friends and family. Although Facebook is regularly used, 59% of users say they share information such as sports results, car accidents and crime news rather than opinions. A young, male shop-owner from an urban area of Kalay Township confirms "I don't normally share the news I know with a stranger. I only share with people I know and who I can discuss it with." This statement is supported by the fact that 89% of the Chin population shares and discusses news and information with their family and friends, followed by their place of worship (26%), on Facebook (22%) and at local teashops (8%). Half of the population shares news with their trusted circle at least once a week.

CONCLUDING QUESTIONS

IN the short-term, persistence and resilience will continue to be key to the sustainability of local media outlets, including in Chin State. Media infrastructure issues, whether underdeveloped telecommunications, state media monopolies, restricted access to the broadcast sector and the lack of a functioning broadcast law, or a lack of local printing capabilities, are all critical to the economic survival of local media outlets. Many of these problems are structural and require a focused strategy by the government, including on the ethnic state level, as well as by development agencies and the media themselves. These strategies would need to respond to the following questions:

1. How can local economic growth and entrepreneurship be promoted in Chin State, including in the most remote areas? How can small and medium-sized businesses be encouraged to join the formal economy? How can the mindsets of local Chin businesses be changed so that they gain a better understanding of the role of media and the benefits of advertising?
2. What is the best strategy to ensure that all people living in Chin State have access to electricity, adequate and affordable telecommunications services (mobile services and wifi), improved transportation infrastructure, and protection from natural disasters, as well as rapid response when they happen?
3. What is the state's appropriate role in the media industry? How can the government reduce market distortions that state media dominance causes? What lessons can be learned from other international transitions in state media ownership?
4. How can government and development agencies facilitate a more even transition to digital media, commerce and communications within Myanmar, including in Chin State? How can they support Myanmar-based solutions to common digital revenue problems?
5. How can development agencies best support skills training and capacity-building?
6. How can government and development agencies support ethnic language literacy in Chin State and elsewhere in Myanmar? What international examples exist of minority language preservation, and what are the lessons learned?
7. How can government and development agencies support media literacy in Chin State and elsewhere in Myanmar, in an effort to lessen the impact of misinformation, disinformation, propaganda and hate speech? How can they work together to enable access to credible news and information for everyone living in Chin State? How can the government and development agencies help to improve the quality of education in Chin State, including in the most remote areas?

Local media outlets must also address several important strategic questions when planning for their long-term futures:

1. What should be the strategic mission of Chin media outlets? Creating and distributing news, supporting local economies, and/or preserving and modernizing local ethnic languages and cultures?
2. Where should business development efforts be focused? Print media? Television? Radio? Digital? Other businesses entirely? How can Chin media develop their own bespoke sales and marketing strategies?
3. How should local media outlets plan for the digital transition? Where should digital channels invest time and money? Which new audiences do digital media make available? Which potential revenue streams do these audiences support? Advertising? Subscriptions? Commerce?
4. How should management encourage, reward and motivate local media teams, whether news, administration or sales?
5. How should management plan for, and finance, operating losses that support local media outlets' long-term strategy for sustainability?
6. How can management best retain staff and ensure training and capacity-building?

The answers to these questions will help set the framework for long-term strategies for media and revenue development, organisational development and ultimately sustainability in Chin State and across the states and regions.

APPENDICES

Research tables, charts, abbreviations, media sources (MSR)

Abbreviations

AA	Arakan Army
BBC	British Broadcasting Corporation
CAPI	Computer-Assisted Personal Interviews
DVB	DVB Multimedia (formerly known as Democratic Voice of Burma)
FGD	Focus Group Discussion
FM	Frequency Modulation
MDIF	Media Development Investment Fund
MMK	Myanmar Kyat (Currency)
MNTV	Myanmar National Television
MRTV	Myanmar Radio and Television
MSR	Myanmar Survey Research
PPS	Probability Proportional to Size
ST	Sub-township
VOA	Voice of America

MEDIA CITED

P = Private ownership
S = State ownership
M = Military ownership
JV = Joint venture
PSB = Public service broadcaster
CR = Community Radio

D = Daily
W = Weekly
BW = Bi-weekly
Mo = Monthly
6/year = every two months

TELEVISION		
Local	**National**	**International**
Mizo Cable Channel (P)	Myanmar International TV (S)	Al Jazeera (P)
Mizoram Cable Channel (P)	Myawaddy (M)	BBC World News (PSB)
LPS Cable Channel (Chin) (P)	MRTV (S)	CNN International (P)
IPS Mizo Chin News (P)	MRTV4 (JV)	CNA (Channel News Asia) (P)
Hakha Cable TV (P)	MRTV Entertainment (JV)	NHK (Japan News Channel) (PSB)
IVision (P)	Sky Net Up To Date (JV)	CCTV 4 (China TV) (S)
	Channel 7 (JV)	Airtel Sports (P)
	DVB Media (P)	HBO movies (P)
	Hluttaw TV (S)	SCN Channel (P)
	5 Plus (JV)	ESPN (P)
	MNTV (JV)	Discovery (P)
	Mahar (JV)	Animal Channel (P)
	Channel 9 (JV)	Indian movies (P)
	Buddhist Channel (JV)	Star Sports (P)
	Mizzima (P)	Star Movie (P)
	Sky Net Movies (JV)	PSI Channel 27 (P)
	CANAL+ Mae Madi (JV)	Sony Sport Channel (P)
	5 Cartoons (JV)	Sun TV (P)
		DDK Channel (P)
		Zing TV (P)
		RFA Burmese (P)
		PSI (P)
		Doordarshan Channel (P)
		India Zee TV (P)

RADIO STATIONS		
Local	**National**	**International**
Hakha FM (known as Hakha FM locally but actually broadcast from Mizorum, India) (P)	Myanmar Radio/ (Myanma Ah Than Radio) (S)	BBC Burmese Service (PSB)
Lunglei FM (known as Lunglei FM but broadcast from Mizorum, India) (P)	Nay Pyi Taw Myanma Radio FM (S)	VOA Burmese (S)
	Yangon City FM (S)	RFA (P)
	Shwe FM (JV)	India FM (S)
	Mandalay FM (JV)	
	Padamyar FM (JV)	
	Pyinsawaddy FM (JV)	
	Cherry FM (JV)	
	Bagan FM (JV)	
	Thazin FM (JV)	
	Teen Radio (JV)	

PRINTED MEDIA		
Local	**National**	**International**
The Chinland Post (P) (W)	Kyemon (S) (D)	
The Hakha Post (P) (D)	Myanmar A Lin (S) (D)	International News Journal (W)
Khonumthung News (P) (Mo)	7Day Daily (P) (D)	
Tedim Times (P) (currently digital)	7Day Weekly (P) (W)	
Zomi Post Media (P) (Mo)	Eleven News (P) (D)	
Chinland Herald (P) (D)	Eleven Journal (P) (W)	
Lairawn Post (P)	Myanmar Times (Burmese) (P) (D)	
The Chin Voice (P) (W)	Kumudra (P) (W)	
Zomi Times (P) (W)	Mizzima (P) (W)	
Zolengthe (P) (currently digital)	The Voice Daily (P) (D)	
Myo Kyae Thu Catholic Journal (P)	Yadanarbon (S) (D)	
Gilgal (Christian Chin Journal) (P)	Myawaddy Newspaper (M) (D)	
Chin Digest (P) (6/year)	Inn Arr (Sports Journal) (P) (W)	
Khaw Tlang Meichers (P)	The Myanmar Herald Journal (P) (W)	

RIH Media news (P) (digital only)	Khit Thit (P) (W)	
Meifar newspaper (P)	Hmu Khin (Crime Journal) (P) (W)	
Zangkong Awging News (P)	Ah Lin Tan Journal (P) (W)	
Kalay Diocese Journal (P)	Na Nat Khin (Morning) Journal (P)(W)	
The Voice of Zomi (P)	Thuriya Nay Wun Journal (P) (W)	
Taungzalat Times (S)	Democracy Today (P) (D)	
Hriatna English (P)	Pyi Myanmar Journal (P) (W)	
Mutu Land News Journal (P)	The CBCM Herald (P) (W)	
ZYA Weekly News (P) (W)	Doe Kyay Ywar Journal (P) (W)	
	Shwe Tway Journal (P) (W)	
	Frontier Myanmar (P) (BW)	
	Gloria News Journal (P) (W)	

QUANTITATIVE QUESTIONNAIRE (MSR)

Introduction and Informed consent

ID1.1 Village tract name:	
ID1.2 Village Name:	
ID1.3 Village AF code	
ID1.4 Village MIMU code	
ID1.5 Township	
ID1.6 Region/State	
ID1.7 Interview date /	/2019
ID1.8 Interview start /	hr
ID1.9 Interview end /	hr
ID1.10 Enumerator	

INTRODUCTION

Good morning/afternoon/evening.
My name is___________________________________
I am here on behalf of Myanmar Survey Research. I am here to learn about people's media habits and needs in Chin State. We would like to talk to you and other people in your neighbourhood about these matters.
We intend to use your responses for research purposes only. Your identity will be kept confidential and your responses will not be credited to you, which means we will remove anything that is likely to identify you as taking part in this study, such as names and villages. Your answers to my questions will be combined with answers from many other people, to avoid your responses being identified as yours.

You can decide not to answer any question that you do not want to, you can stop the interview at any time without explanation, or you can request that your answers are removed from the research at any time. You will not be penalized if you decide not to participate.

The interview will take about 30 minutes.

Could you help me answer some questions?
Yes / No

SECTION 1: DEMOGRAPHIC INFORMATION

1. Gender of the respondent
   [Do not ask – record only]

2. Age of the respondent
   [Interviewer: Record age in years.]
   1. ______________Year
   98. (Don't know)
   99. (Refused)
3. What is your ethnic background?
   [Interviewer: Do not read the categories.]
   1. Falam (Chin)
   2. Tedim (Chin)
   3. Hakha (Chin)
   4. Matupi (Chin)
   5. Bamar
   6. Mixed ethnicity
   7. Other (Specify____)
   98. (Don't know)
   99. (Refused)

4. Which language do you speak most at home?
   [Interviewer: Do not read the categories.]
   1. Falam (Chin)
   2. Tedim (Chin)
   3. Hakha (Chin)
   4. Matupi (Chin)
   5. Bamar
   6. Mixed ethnicity
   7. Other (Specify____)
   98. (Don't know)
   99. (Refused)

5. What is the highest level of education you have attained?
   [Interviewer: Read the categories 1-12 if necessary]

1. No schooling – illiterate
2. No Schooling- Literate
3. Monastic education
4. Some primary school
5. Primary attainment (Completed grade 5)
6. Some middle school
7. Middle attainment (Completed grade 9)
8. Some high school
9. High school attainment (Completed grade 11)
10. Vocational college/ diploma
11. University student/ Some university completed
12. Completed undergraduate
13. Postgraduate degree
98. (Don't know)
99. (Refused)

6. Which one of these phrases comes closest to your own feelings about your household's income these days?
   [Interviewer: Use show card or read categories 1-4 if necessary]
   1. Living comfortably on present income
   2. Getting by on present income
   3. Finding it difficult on present income
   4. Finding it very difficult on present income
   98. (Don't know)
   99. (Refused)

7. Which religion do you belong to or feel the closest to?
   [Interviewer: Do not read the categories. Probe for specific denomination]
   1. Islam
   2. Christian – Baptist
   3. Christian – Protestant (Non-Baptist)
   4. Christian – Catholic
   5. Jewish
   6. Buddhist
   7. Hindu
   8. Animist or Nativist
   9. None/ Atheist
   97. Other (Specify ____)
   98. (Don't know)
   99. (Refused)

8. a. Do you currently have a paid job (Income)?
   1. Yes [Skip to 9.a]
   2. No [Continue]
   98. (Don't know) [Continue]
   99. (Refused) [Continue]

8. b. Are you unemployed and looking for work?
   1. Yes [Skip to 10]
   2. No [Continue]
   98. (Don't know) [Continue]
   99. (Refused) [Continue]

8. c. Which one of the following best describes you, if any? *[All skip to 10]*
   1. Student
   2. Homemaker
   3. Retired
   4. Disabled
   97. Other (Specify____)
   98. (Don't know)
   99. (Refused)

9. a. What is your primary occupation/job title?
   [Interviewer: Do not read categories]
   1. Business owner
   2. Vendor/ small scale trader/ self-employed
   3. Professional doctor, lawyer, engineer, teacher, nurse, etc.
   4. Manager/ Executive/ Official: in a business or government
   5. Clerical/ other office worker/ Sales worker
   6. Service worker: maid, taxi driver, maintenance or repair worker, etc.
   7. Construction/ Manufacturing/ Production worker
   8. Farmer/ Fisherman/ Other agricultural laborers/ animal farming
   97. Other (Specify ____)
   98. (Don't know)
   99. (Refused)

9. b. Which of the following best describes your employer?
   [Interviewer: Read the categories]
   1. The government: non-military
   2. The government: military
   3. A domestic or foreign organization that provide aid or social services/ NGO
   4. A private business or company
   5. Self-employed/ own my own business
   97. Other (Specify ____)
   98. (Don't know)
   99. (Refused)

SECTION 2: MEDIA ACCESS AND USE

10. Thinking of all the different types and sources of news available, how important is following the news to you?
    [Interviewer: Read categories 1-4]
    1. Not at all important
    2. Not very important
    3. Somewhat important
    4. Very important
    98. (Don't know)
    99. (Refused)

11. Which of the following media device do you regularly have access in your house or access in any other place or online in the last 6 months? (MA)

		1. Own or have at my home	**2. Can regularly access in another place**	**98. Don't know**	**99. Refuse to answer**
1	Television				
2	Online TV				
3	Radio (Traditional)				
4	Online Radio				
5	Community Radio				
6	Print media (Daily Newspapers)				
7	Print media (Journals)				
8	Internet websites				
9	YouTube				
10	Facebook				
11	Other Social Media				

- *"Newspapers/magazines" can include mobile news apps and social media news pages.*
- *"Access" regularly does not necessarily mean "use" regularly. E.g. You may have a television at your office that you could access, but you never often watch it. Answer according to access.*
- *"Regularly access" means at least once per week*
- *PROGRAMMING: Follow-up questions to appear immediately after selection of each media type. E.g. Selects "TV" → "How frequently do you watch TV?", followed by selects "Newspaper" → "When was the last time you read a newspaper?" → "How frequently do you read the newspaper", etc.*

12. [For each item selected in 11] How frequently do you access [______________________________]?
    [Interviewer: Do not read choices unless respondent needs help, then probe: "More or less than once per week?"]

1. Daily
2. Weekly
3. Monthly
4. Yearly
5. Less than once per year
6. (Do not use)
98. (Don't know)
99. (Prefer not to say)

13. a. [If selected Code 1 in Q11] How much do you pay per month for TV?
    1. Nothing - it is free
    2. Nothing - someone else pays for it
    3. Out of pocket spending:______________________________
    98. (Don't know)
    99. (Prefer not to say)
13. b. [If selected Code 6 and 7 in Q11] How much do you pay per month for print media?
    1. Nothing - it is free
    2. Nothing - someone else pays for it
    3. Out of pocket spending:______________________________
    98. (Don't know)
    99. (Prefer not to say)

13. c. [If selected Code 2, 4, 8, 9 10, and 11 in Q11] How much do you pay per month for internet?
    1. Nothing - it is free
    2. Nothing - someone else pays for it
    3. Out of pocket spending: ______________________________
    98. (Don't know)
    99. (Prefer not to say)

- *To add all individual subscriptions for each channel to calculate how much you spend on TV in general. Include price even if shared among household, e.g. internet subscription.*
- *"pay" does not include fixed costs like the purchase of the TV, or monthly electricity charges to watch it. Instead refers to additional costs like individual purchase of newspaper, subscription to particular TV channel, internet subscription, etc*
- *Mobile data to be included in "mobile phone" category, not in "internet" category*
- *"payment" for internet meaning home router, wifi, etc.*
- *"payment" for radio to not include mobile phone)*
- *"Someone else pays for it" can include office paying for it*

14. [If yes to TV (including online) in Qno.11] [Ask only if answered yes to any of code 1 – 3 in Q12] Can you tell me which channels you have watched in the past month?
    [Interviewer: DO NOT READ CHOICES UNLESS THE RESPONDENT CANNOT ANSWER. Open-ended; Select all that apply; Enter all other channels in "other". Probe: "Any others?" until done]
    1. Myanmar International
    2. Myawaddy
    3. MRTV

4. MRTV 4
5. MRTV Entertainment
6. Sky Net Up to Date
7. Channel 7
8. DVB
9. Hluttaw TV
10. 5 Plus
11. Al Jazeera (in English)
12. BBC World News
13. CNN International
14. CNA (Channel News Asia)
15. NHK (Japan news channel)
16. CCTV 4 (China TV)
17. MNTV
18. Mahaa
19. Other: ______________________________
98. (Don't know)
99. (Refused)

15. [For each source selected in Qno.13]
    How trustworthy is the news information on this channel? Is it very trustworthy, somewhat trustworthy, not very trustworthy, or not trustworthy at all?
    1. Trustworthy
    2. Sometimes yes, sometimes no
    3. Untrustworthy
    98. (Don't know)
    99. (Refuse to answer)
    100. (Don't watch news)

16. Overall, please indicate how satisfied you are with the news information provided on TV?
    [Interviewer: Read categories 5-1]

		Extremely satisfied	**Satisfied**	**Neutral**	**Dissatisfied**	**Extremely dissatisfied**	**Not applicable**
a	Content	5	4	3	2	1	99
b	Timeliness	5	4	3	2	1	99
c	Affordable (Cost)	5	4	3	2	1	99

17. [If yes to radio (including online radio) in Qno.11] [Ask only if answered yes to any of code 1 – 3 in Q12]
    Can you tell me which radio stations you have listened to in the past month?
    [Interviewer: DO NOT READ CHOICES UNLESS THE RESPONDENT CANNOT ANSWER. Open-ended; Select all that apply; Enter all other channels in "other". Probe: "Any others?" until done]
    1. Voice of Myanmar Radio/ (Myanma Ah Than Radio)
    2. Nay Pyi Taw Myanma Radio FM
    3. Yangon City FM

4. Shwe FM
5. Mandalay FM
6. Padamyar FM
7. Pyinsawaddy FM
8. Cherry FM
9. Bagan FM
10. BBC Burmese Service
11. VOA Burmese
12. RFA
97. Other: (Specify____)
98. (Don't know) [Skip to Q19]
99. (Prefer not to say) [Skip to Q19]

18. [For each source selected in Qno.17]
How trustworthy is the news information on this station? Is it very trustworthy, or not trustworthy?
    1. Trustworthy
    2. Sometimes yes, sometimes no
    3. Untrustworthy
    98. (Don't know)
    99. (Refuse to answer)
    100. (Don't listen)

19. [If yes to community radio in Qno.11] [Ask only if answered yes to any of code 1 – 3 in Q12]
Can you tell me which community radio station you listen to?
[Interviewer: This is Open-ended; Select all that apply; Enter all other channels in "other". Probe: "Any others?" until done]
    1. Specify ____
    2. Specify ____
    98. (I don't know) [Skip to 21]
    99. (Refused to answer) [Skip to 21]

20. How trustworthy is the news information in the community radio? Is it very trustworthy, somewhat trustworthy, not very trustworthy, or not trustworthy at all?
    1. Trustworthy
    2. Sometimes yes, sometimes no
    3. Untrustworthy
    98. (Don't know)
    99. (Refuse to answer)
    100. (Don't listen)

21. [Ask if listen to radio (including online radio) or Community radio] Overall, please indicate how satisfied you are with the news information provided on radio?
[Interviewer: Read categories 5-1]

		Extremely satisfied	**Satisfied**	**Neutral**	**Dissatisfied**	**Extremely dissatisfied**	**Not applicable**
a	Content	5	4	3	2	1	99
b	Timeliness	5	4	3	2	1	99
c	Affordable (Cost)	5	4	3	2	1	99

22. [If used Print media (Daily and Weekly) within a month in Q12] [Ask only if answered yes to any of code 1 – 3 in Q12]
Can you tell me which of these you have read in the past month?
[Interviewer: DO NOT READ CHOICES UNLESS THE RESPONDENT CANNOT ANSWER. Open-ended; Select all that apply; Enter all other channels in "other". Probe: "Any others?" until done]
    1. Kyemon
    2. Myanmar A Lin
    3. 7Day daily
    4. 7Day Weekly
    5. Eleven daily news
    6. Eleven Journal
    7. The Chinland Post
    8. The Hakha Post
    9. Khonumthung News
    10. Tedim times
    11. Zomi Post Media
    12. Chinland Herald
    13. Lairawn Post
    14. Matupi Times
    15. Zomi Times
    16. Frontier Myanmar
    17. The Myanmar Times (Burmese Version)
    18. Kumudra
    19. Mizzima
    20. The Voice Daily
    21. The Voice Weekly
    22. Golden Fresh Land (aka Shwe Naing Ngan Thit)
    23. Yadanarbon
    24. Myawaddy daily
    25. Inn Arr (sport)
    26. The Myanmar Herald
    27. Khit Thit
    28. Hmu Khin (Crime Journal)
    29. Ah Lin Tan Journal
    30. Na Nat Khin (Morning) Journal

31. Thuriya Nay Wun
32. Democracy Today
97. Other: (Specify ______________________________)
98. (Don't know) [Skip to 24]
99. (Prefer not to say) [Skip to 24]

23. [For each source selected in Qno.21]
How trustworthy is the news information in this newspaper? Is it very trustworthy, somewhat trustworthy, not very trustworthy, or not trustworthy at all?
1. Trustworthy
2. Sometimes yes, sometimes no
3. Untrustworthy
98. (Don't know)
99. (Refuse to answer)

24. Where did you obtain the most recent print media copy that you read?
[Interviewer: Do not read choices unless respondent needs help, then probe: "Bought from a seller or a store"]
1. Bought from a news seller
2. Door to door subscription
3. Obtained from a friend
4. Read a copy in a tea house, coffee shop or restaurant
5. Read a copy in other public space
97. Other (Specify ______________________________)

25. After the last time you read a print copy, what did you do with it?
[Interviewer: Do not read choices unless respondent needs help, then probe.]
1. Discarded it
2. Left it where I found it
3. Gave it to a friend
4. Kept it for the future reference

26. Overall, please indicate how satisfied you are with the news information provided in print media?
[Interviewer: Read categories 5-1]

		Extremely satisfied	**Satisfied**	**Neutral**	**Dissatisfied**	**Extremely dissatisfied**	**Not applicable**
a	Content	5	4	3	2	1	99
b	Timeliness	5	4	3	2	1	99
c	Affordable (Cost)	5	4	3	2	1	99

27. [Ask only if answered yes to any of code 1 – 3 in Q12]
In the last 7 days, which of the following devices have you used to access the Internet?

		Yes	No	(Don't know)	(Refused)
a	Desktop computer	1	2	98	99
b	Laptop computer	1	2	98	99
c	Mobile phone	1	2	98	99
d	Tablet	1	2	98	99
e	Some other device (e.g., TV, satellite)	1	2	98	99

28. Which of the following activities have you done in the past 7 days on any computer or mobile device?

		Yes	No	(Don't know)	(Refused)
a	Sent or received an email	1	2	98	99
b	Watched a video	1	2	98	99
c	Listened to or watched a podcast	1	2	98	99
d	Posted a comment on a blog or news site	1	2	98	99

29. What local media do you access online to get news in the past month?
[Interviewer: DO NOT READ CHOICES UNLESS THE RESPONDENT CANNOT ANSWER. Open-ended; Select all that apply; Enter all other channels in "other". Probe: "Any others?" until done]
    1. The Chinland Post
    2. The Hakha Post
    3. Tedim Times
    4. Khonumthung News
    5. Chin World
    6. Chin Herald
    7. Lairawn Post
    8. Zolengthe
    9. Zingsoi
    10. Khumi Media Group
    11. The Chin Voice
    12. The Matupi Times
    13. Chinlung Today
    14. Zomi Times
    15. Zomi Post Media
    16. Other (Specfiy ------------)
    17. Other (Specify ------------)
    98. (I don't know) [Skip to 32]
    99. (Refused) [Skip to 32]
    100. (Don't watch news) [Skip to 32]

30. [For each source selected in Q.28]
    How trustworthy is the news information in the internet? Is it very trustworthy, somewhat trustworthy, not very trustworthy, or not trustworthy at all?
    1. Trustworthy
    2. Sometimes yes, sometimes no
    3. Untrustworthy
    98. (Don't know)
    99. (Refuse to answer)
    100. (Don't watch news) [Skip to 32]

31. Overall, please indicate how satisfied you are with the news information provided on Internet?
    [Interviewer: Read categories 5-1]

		Extremely satisfied	Satisfied	Neutral	Dissatisfied	Extremely dissatisfied	Not appli-cable
a	Content	5	4	3	2	1	99
b	Timeliness	5	4	3	2	1	99
c	Affordable (Cost)	5	4	3	2	1	99

32. [Ask only if answered yes to any of code 1 – 5 in Q12] Which of the following do you access using YouTube?
    [Interviewer: DO NOT READ CHOICES UNLESS THE RESPONDENT CANNOT ANSWER. Open-ended; Select all that apply; Enter all other channels in "other". Probe: "Any others?" until done]
    1. Music
    2. Vlogger
    3. Movie/ documentaries
    4. News
    5. Other (Specify______________________________)
    6. Other (Specify______________________________)
    98. (I don't know) [skip to 34]
    99. (Refused) [skip to 34]

33. [If news (Code 4) selected in Qno.32]
    How trustworthy is the news information on YouTube? Is it very trustworthy, somewhat trustworthy, not very trustworthy, or not trustworthy at all?
    1. trustworthy
    2. sometimes yes, sometimes no
    3. untrustworthy
    98. (Don't know)
    99. (Refuse to answer)

34. [Ask only if answered yes to any of code 1 – 5 in Q12]
    Can you tell me which of these you follow on Facebook? (MA)
    [Interviewer: DO NOT READ CHOICES UNLESS THE RESPONDENT CANNOT ANSWER. Open-ended; Select all that apply; Enter all other channels in "other". Probe: "Any others?" until done]

1. Friends
2. Family
3. News Page
4. Political Leader
5. Religious/Spiritual leader
6. Athletes
7. Music/Movie Star
8. Entertainment
9. Intellectuals
97. Other (Specify ______________________________)
97. (Don’t know)
97. (Prefer not to say)

35. How trustworthy is the news information on Facebook? Is it very trustworthy, somewhat trustworthy, not very trustworthy, or not trustworthy at all?
    1. Trustworthy
    2. Sometimes yes, sometimes no
    3. Untrustworthy
    98. (Don’t know)
    99. (Refuse to answer)

36. How often do you post on Facebook?
    1. Several times a day
    2. Once a day
    3. Several times a week
    4. Once a week
    5. Several times a month
    6. Once a month
    7. I rarely post
    8. I never post [Skip to 38]
    98. (Don’t know) [Skip to 38]
    99. (Refused) [Skip to 38]

37. What is the reason for the post?
    1. Sharing your ideas about politics and society
    2. Talk with your family and friends
    3. Need for your business
    4. Spreading your activities and photos
    5. Spreading information
    6. Other (Specify ______________________________)
    99. 99. (Refused)

38. [Ask only if answered yes to any of code 1 – 5 in Q12]] [Ask only if answered yes to any of code 1 – 3 in Q12]
    Can you tell me which of these you have used in the past month?
    [Interviewer: DO NOT READ CHOICES UNLESS THE RESPONDENT CANNOT ANSWER. Open-

ended; Select all that apply; Enter all other channels in "other". Probe: "Any others?" until done]

1. Instagram
2. WeChat
3. Twitter
4. Other (Specify____)
98. (Don't know) [Skip to 41]
99. (Refused) [Skip to 41]

39. Which of the following do you access using Social Media?
[Interviewer: DO NOT READ CHOICES UNLESS THE RESPONDENT CANNOT ANSWER. Open-ended; Select all that apply; Enter all other channels in "other". Probe: "Any others?" until done]
    1. Music
    2. Vlogger
    3. Movie/ documentaries
    4. News
    5. Other (Specify ____)
    6. Other (Specify ____)
    98. (I don't know)
    99. (Refused)

40. [If news (Code 4)selected in 39]
How trustworthy is the news information in the social media? Is it very trustworthy, somewhat trustworthy, not very trustworthy, or not trustworthy at all?
    1. Trustworthy
    2. Sometimes yes, sometimes no
    3. Untrustworthy
    98. (Don't know)
    99. (Refuse to answer)

41. In the last 7 days, which of the following devices have you used to access Social Media including Facebook?

		Yes	**No** *(Skip to 43 only if answered "No" to all Q41a – e)*	**(Don't know)**	**(Refused)**
a	Desktop computer	1	2	98	99
b	Laptop computer	1	2	98	99
c	Mobile phone	1	2	98	99
d	Tablet	1	2	98	99
e	Some other device (e.g., TV, satellite)	1	2	98	99

42. How often do you use social media including Facebook? [PROBE]
    1. Several hours per day
    2. Half an hour to an hour per day

3. At least once per day (less than half an hour)
4. At least once per week
5. At least once per month
6. A few times per year
7. Hardly ever
98. Don't know
99. Prefer not to say

43. Overall, please indicate how satisfied you are with the news information provided on social media including Facebook?
[Interviewer: Read categories 5-1]

		Extremely satisfied	**Satisfied**	**Neutral**	**Dissatisfied**	**Extremely dissatisfied**	**Not applicable**
a	Content	5	4	3	2	1	99
b	Timeliness	5	4	3	2	1	99
c	Affordable (Cost)	5	4	3	2	1	99

44. Which communication apps are you using on your phone?
[Interviewer: DO NOT READ CHOICES UNLESS THE RESPONDENT CANNOT ANSWER. Open-ended; Select all that apply; Enter all other channels in "other". Probe: "Any others?" until done]
1. Viber
2. WeChat
3. WhatsApp
4. Gmail
5. (Facebook) Messenger
6. Don't use
97. Other (Specify ______________________________)
98. (Don't know)
99. (Prefer not to say)

45. Do you use your mobile phone to access media outlets?
1. Yes
2. No [Skip to 47]
98. (Don't know) [Skip to 47]
99. (Prefer not to say) [Skip to 47]

46. If yes, which mobile operator do you use? (MA)
1. MPT
2. Ooredoo
3. Telenor
4. Mytel
5. Other (Specify ______________________________)

SECTION 3: MEDIA BEHAVIOUR

47. Where do you generally get news and information?

[Interviewer: DO NOT READ CHOICES UNLESS THE RESPONDENT CANNOT ANSWER. Open-ended; Select all that apply; Enter all other channels in "other". Probe: "Any others?" until done]

1. TV
2. Online TV
3. Radio
4. Online Radio
5. Family
6. Friends
7. Tea shop
8. Community leaders
9. Place of worship (Church, Pagoda, Mosque, etc.)
10. Social media (including Facebook)
11. Other (Specify ______________________________)

48. [If answer 5 – 10 in Q47] How do you normally receive news or information?

[Interviewer: DO NOT READ CHOICES UNLESS THE RESPONDENT CANNOT ANSWER. Open-ended; Select all that apply; Enter all other channels in "other". Probe: "Any others?" until done]

1. Personal talk
2. Phone conversation
3. Print version
4. Viber
5. WhatsApp
6. Messenger
7. WeChat
8. Email
9. Other (Specify ______________________________)

98. (Don't know)
99. (Prefer not to say)

49. What languages do you use to access news and information?

1. Burmese
2. Falam (Chin)
3. Matupi (Chin)
4. Hakha (Chin)
5. Tedim (Chin)
6. English

97. Other (Specify ______________________________)

50. What language do you prefer to use in accessing news and information?

1. Burmese
2. Falam (Chin)
3. Matupi (Chin)
4. Hakha (Chin)

5. Tedim (Chin)
6. English
97. Other (Specify ______________________________)

51. What are your three MOST important specific sources of news and information? (This could be TV stations, radio stations, websites, organizations, or people.)
[IF RESPONDENT SAYS "TV", "RADIO", "NEWSPAPERS", OR "INTERNET", PROBE:] What is the specific name of the [TV station/radio station/newspaper/Internet site]?

1	First response: ______________________________ 97 (None/No more responses) 98 (Don't know) 99 (Refused)
2	Second response: ______________________________ 97 (None/No more responses) 98 (Don't know) 99 (Refused)
3	Third response: ______________________________ 97 (None/No more responses) 98 (Don't know) 99 (Refused)

52. How interested are you in each of the following types of news? Tell me if you are very interested, somewhat interested, not very interested, or not at all interested.
[INTERVIEWER: USE SHOW CARD AND READ CATEGORIES 4-1 IF NECESSARY. CIRCLE ONE RESPONSE FOR EACH ROW.]

	Very interested	**Somewhat interested**	**Not very interested**	**Not at all interested**	**(Don't know)**	**(Refused)**
News about your local community	4	3	2	1	98	99
News about Region/State	4	3	2	1	98	99
News about Myanmar	4	3	2	1	98	99
News about India	4	3	2	1	98	99
News about China	4	3	2	1	98	99
News about Thailand	4	3	2	1	98	99
News about Bangladesh	4	3	2	1	98	99

	Very interested	Somewhat interested	Not very interested	Not at all interested	(Don't know)	(Refused)
News about Southeast Asia	4	3	2	1	98	99
News about the rest of the world	4	3	2	1	98	99
News about International perspectives on events in Myanmar	4	3	2	1	98	99

53. What kind of news do you mostly read, watch or listen to? (SA)
[Interviewer: Show card and read the categories. Probe "Any other?" until done.]
1. Politics
2. Business
3. Social
4. Entertainment
5. Health
6. Sport
7. IT
97. Other (Specify ______________________________)
98. (Don't know)
99. (Prefer Not to say)

54. Is there anything that prevents you from getting access to news and information?
[Interviewer: Show card and read the categories. Probe "Any other?" until done.]
1. Geography (Mountains etc.)
2. Roads
3. Language
4. Money
97. Other (Specify ______________________________)
98. (Don't know)
99. (Prefer Not to say)

55. What information do you think you are not able to access easily?
[Interviewer: Show card and read the categories. Probe "Any other?" until done.]
1. News about local community
2. News about Region/ State
3. News about Myanmar
4. News about Southeast Asia
5. News about the rest of the world
6. News about International perspectives on events in Myanmar
7. Other (Specify ______________________________)
98. (Don't know)
99. (Prefer not to say)

56. What information would you want more in the future?
    Specify ______________________________

57. Do you share and discuss the news and information you access?
    [Interviewer: Read the categories. Probe "Any other?" until done.]
    1. With family and friends
    2. On Facebook and other social media platforms
    3. At the local teashop
    4. At the place of worship (Church, Pagoda, Mosque, etc.)
    5. At the local community center
    6. At school
    97. Other (Specify ______________________________)
    98. (Don't know) [Skip to 59]
    99. (Prefer not to say) Skip to 59]

58. How often do you discuss or share news with family, other relatives, or other people?
    [Interviewer: Read the categories 1-4]
    1. Daily or most days per week
    2. At least once a week
    3. Less than once a week
    4. Never
    98. (Don't know)
    99. (Refused)

SECTION 4: DEMOGRAPHIC INFORMATION 2

59. How many people live in your household?
    1. Specify ______________________________
    98. (Don't know)
    99. (Refused to answer)

60. a. How many people in your household earn an income?
    1. Specify ______________________________
    98. (Don't know)
    99. (Refused to answer)

60. b. What is the average total monthly income for your HH from all these sources?
    [Interviewer: This is the TOTAL income per month, so make sure the respondent answers it for the whole month, help them calculate if necessary.]

<Ks25,000	1
25,001-50,000	2

50,001-75,000	3
75,001-100,000	4
100,001-150,000	5
150,001-200,000	6
200,001-300,000	7
Ks300,001+	8
No Income	9
(Don't know)	98
(Refused to answer)	99

60. c. How do you compare your income over the last year with the previous year?

Increased	1
Stable	2
Decreased	3
(Don't know)	98
(Refused to answer)	99

61. Do you have lighting in your household?
    1. Yes
    2. No [End of the questionnaire]
    99. (Refused to answer)

62. What is the major source of electricity in your household? (SA)
    [Interviewer: Do not read the categories, unless respondent need help.]
    1. Electricity from the grid
    2. Village generator
    3. Own generator
    4. Shared generator with other household(s)
    5. Solar power with a battery
    6. Table lamp with dry battery
    7. Hydro generator
    8. Other (Specify ______________________________)
    98. (Don't know)
    99. (Refused)