



NATIONAL SURVEY ON ACCESS TO AND USAGE OF ICT SERVICES IN MALAWI

2015





CONTENTS

INTRODUCTION — P3

KEY SURVEY FINDINGS:

- Households — P5
- Individuals — P11

INTRODUCTION

Malawi Communications Regulatory Authority (MACRA), the national regulator of Information and Communications Technologies (ICT) in Malawi, has a vision to ensure that there is universal access and usage of ICT services across the whole country.

In its quest for this vision, MACRA is mandated to provide reliable and accurate information and data to guide policy makers in developing evidence based policies and strategies. In this regard, MACRA commissioned a national survey on ICT services and engaged the services of the National Statistical Office (NSO) to independently carry out the national survey on access to and usage of ICT services in Malawi.

The survey, being the first ever, tried as much as possible to capture data and information on ICT indicators as defined

by the guidelines and methodologies set by International Telecommunication Union (ITU), the World Summit on Information Society (WSIS) and the Universal Postal Union (UPU) as well as those on recent global ICT developments. The survey covered aspects of accessibility to and usage of telecommunications, broadcasting and postal services in the country.

The main objective of the survey was to establish reliable data on the access to and usage of ICT services at household and individual levels in the country as a baseline and comparable statistics with other countries.

This booklet highlights the latest findings based on the 2014 ICT households and individuals survey conducted by NSO on behalf of MACRA.





HOUSEHOLDS

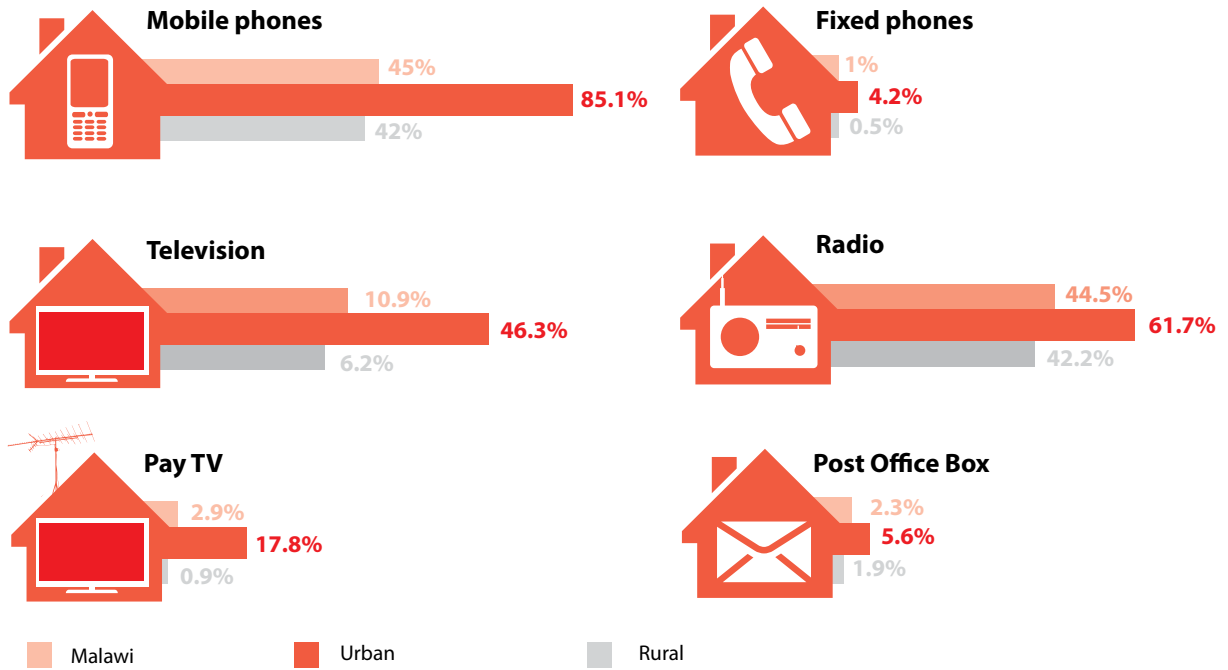


Figure 1: proportion of households with mobile phones, fixed phones, television, radio and post office box by place of residence

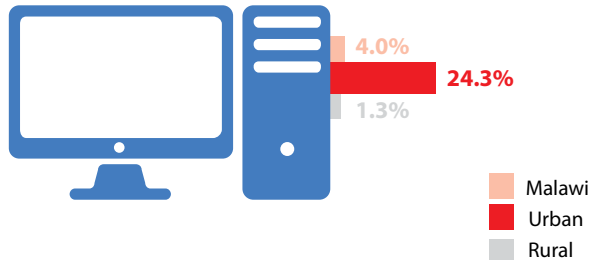


Figure 2: proportion of households with a computer by place of residence

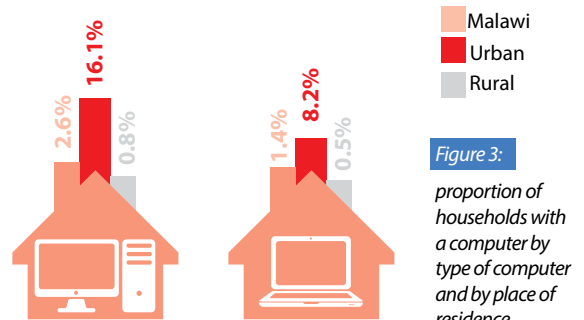


Figure 3: proportion of households with a computer by type of computer and by place of residence

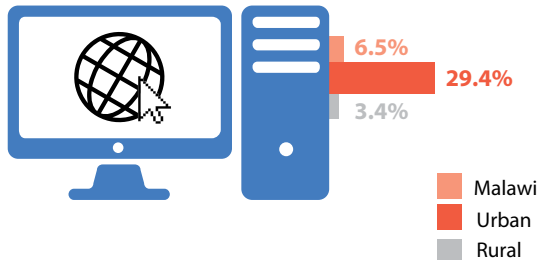


Figure 4: proportion of households with internet access by place of residence

Table 1: proportion of households with internet access by type of connection and geographical location

Type of connection	Malawi	Urban	Rural
Mobile broadband	79.3%	69.4%	90.7%
Wireless broadband	1.1%	1.7%	0.5%
Modem	1.8%	1.9%	1.6%
ADSL	0.5%	0.5%	0.5%
Dongle	17.2%	26.6%	6.6%

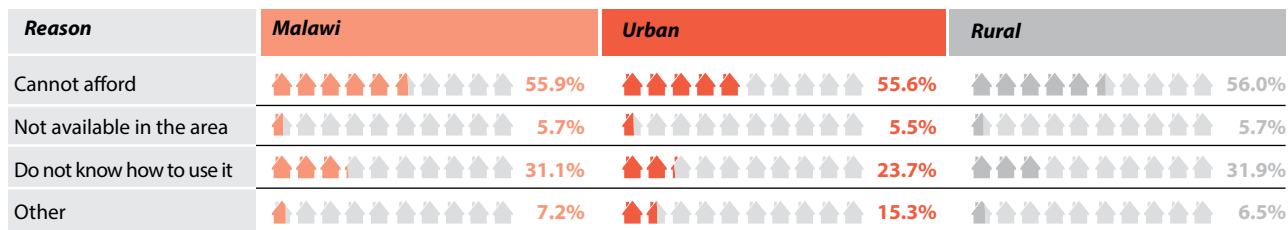


Figure 5: reasons for not having internet access at home by geographical location

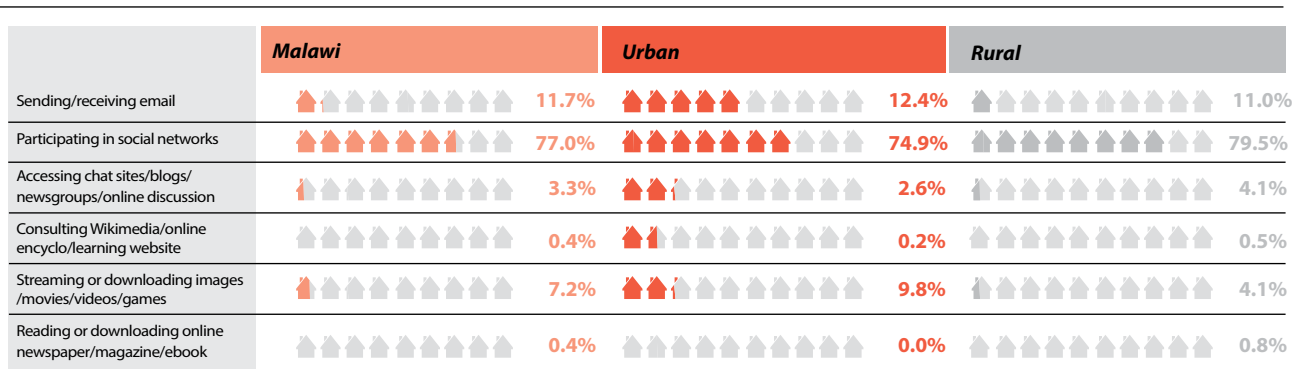


Figure 6: type of internet activity by households by geographical location

26.9%

proportion of households with access to a postal box



Type of Box	Malawi	Urban	Rural
Family box	8.6%	14.9%	7.4%
School box	55.0%	22.5%	61.4%
Office box	15.5%	46.1%	9.4%
Friend's box	1.5%	2.7%	1.3%
Community box	9.4%	2.8%	10.7%
Church box	5.4%	10.8%	4.4%
Other box	4.6%	0.2%	5.5%

Table 2:

type of postal box mostly used by households with access to a box by geographical location

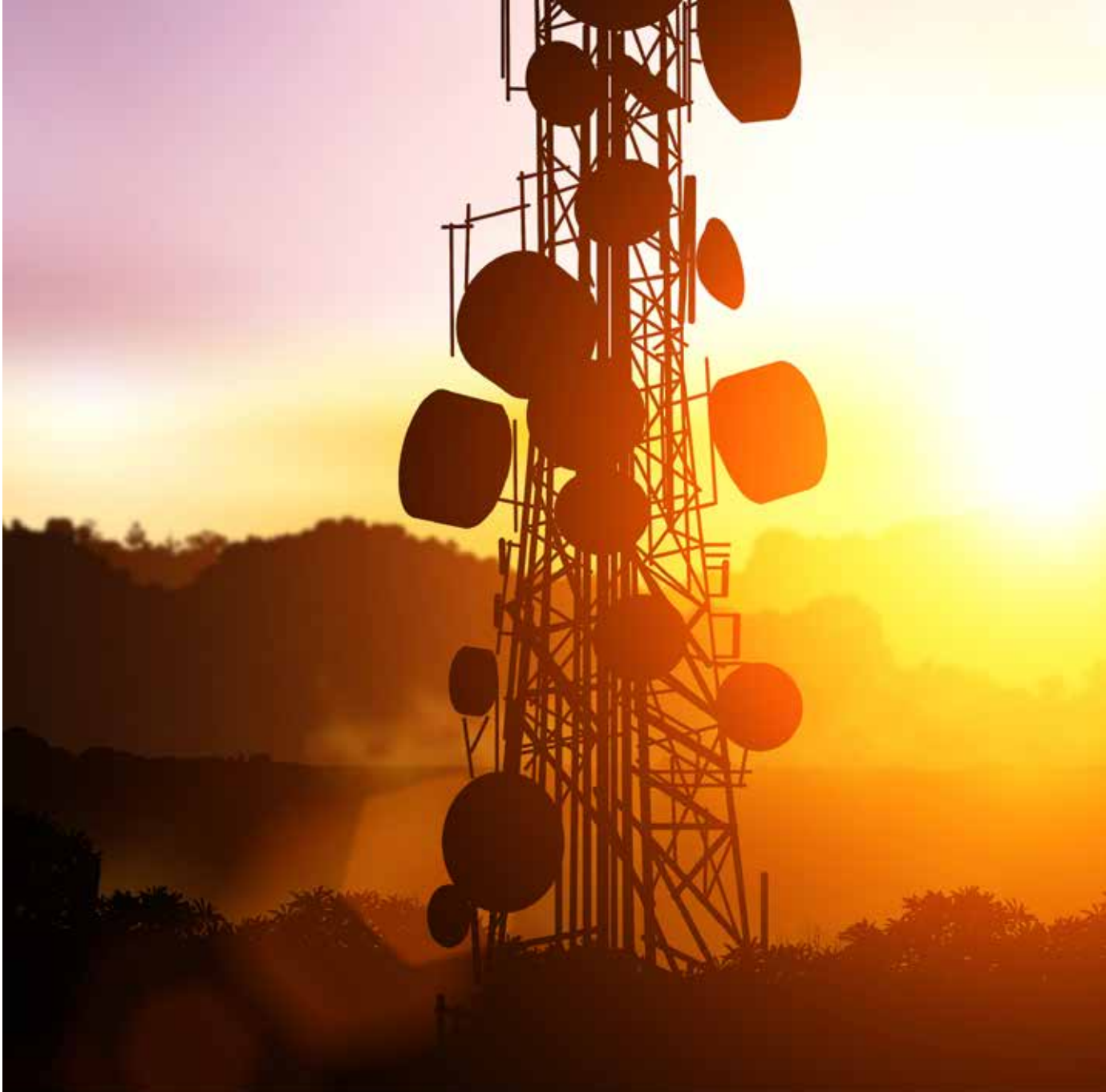


	DSTv	GoTv	Zuku Tv
Malawi	67.2%	28.2%	4.6%
Urban	64.5%	32.3%	3.2%
Rural	76.4%	13.9%	9.7%

Figure 7:

proportion of households with Television that subscribe to pay Tv by geographical location







INDIVIDUALS

Figure 8: proportion of individuals owning mobile phones by geographical location, sex and age

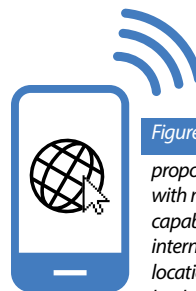
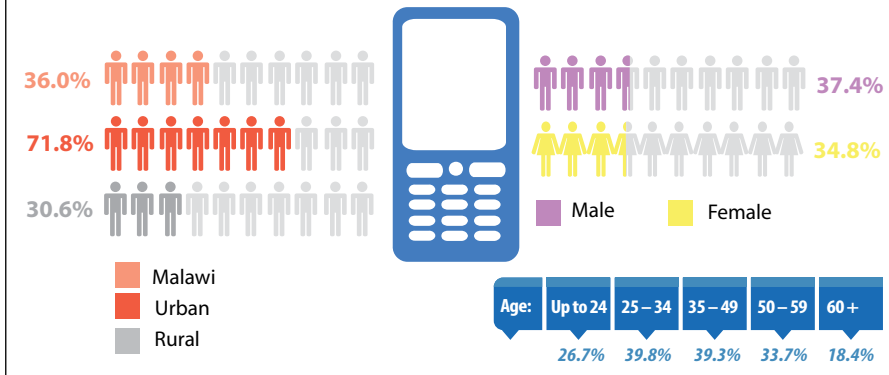
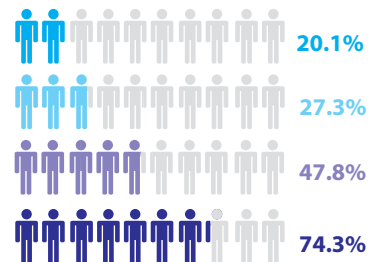


Figure 9:

proportion of individuals with mobile phones capable of browsing internet by geographical location and education background



Education



	Airtel	TNM	MTL	ACL
Malawi	55.9%	43.7%	0.3%	0.0%
Urban	52.3%	47.5%	0.1%	0.1%
Rural	57.2%	42.4%	0.4%	0.0%
Northern region	39.6%	60.2%	0.2%	0.0%
Central region	75.8%	24.0%	0.2%	0.0%
Southern region	44.1%	55.3%	0.5%	0.1%

Table 3:

proportion of individuals by service provider by geographical location and region

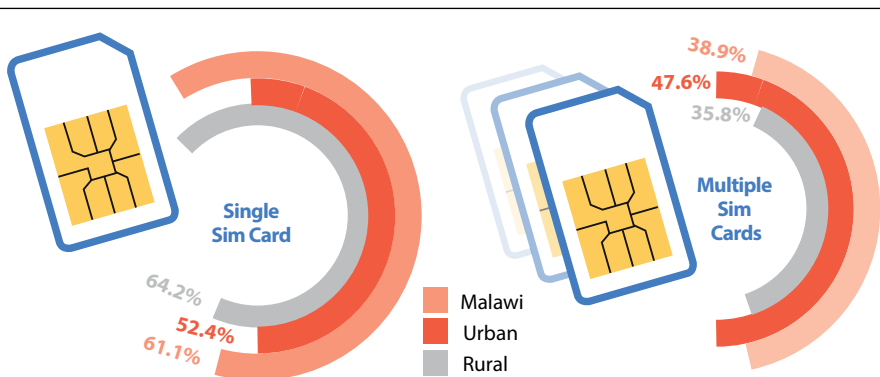


Figure 10: number of active Sim Cards per individuals' by geographical location and gender

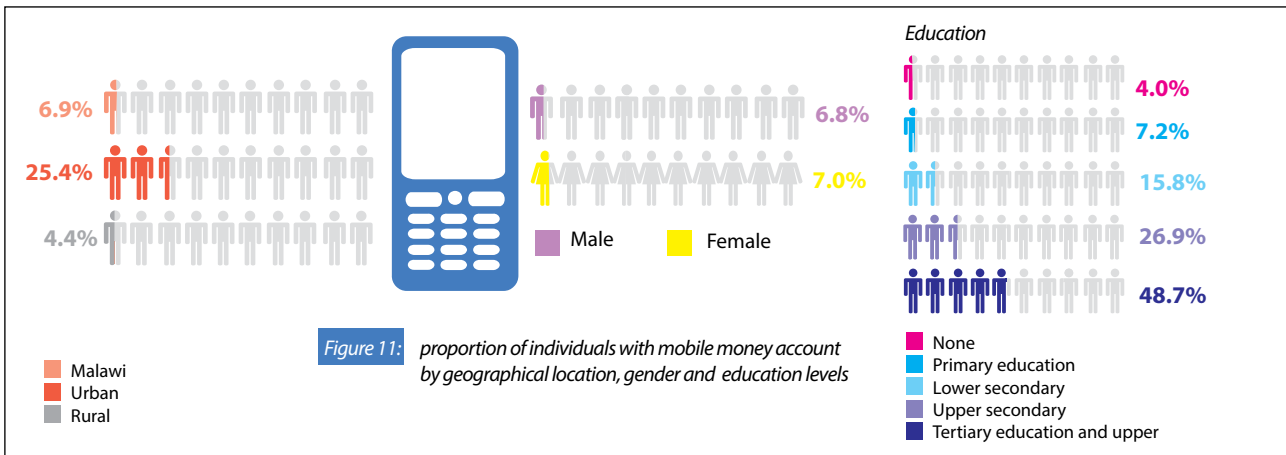
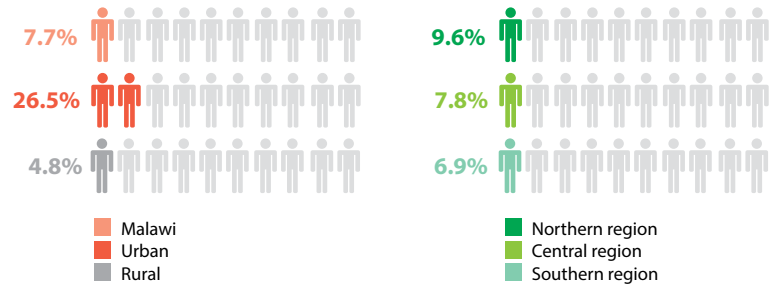


Figure 12: proportion of individuals who ever used mobile money/banking by geographical location and region



	Airtel Money	TNM Mpamba	Mo626	FMB Mobile	NBS Mobile	OIBM Mobile
Malawi	62.2%	31.1%	3.3%	0.2%	1.4%	1.6%
Urban	60.2%	33.1%	4.5%	0.2%	1.0%	0.9%
Rural	63.9%	29.4%	2.3%	0.3%	1.8%	2.3%

Table 4: proportion of individuals who ever used mobile money/banking by type of service used by geographical location



Table 5: Main use for mobile money transfers by geographical location

	Airtime Top up	Salary Payment	Bill Payment	Receive Payment / Remittance
Malawi	64.8%	3.5%	4.4%	27.3%
Urban	81.6%	1.9%	3.1%	13.4%
Rural	42.9%	5.6%	6.1%	45.3%

Figure 13: proportion of individuals using public phones by geographical location

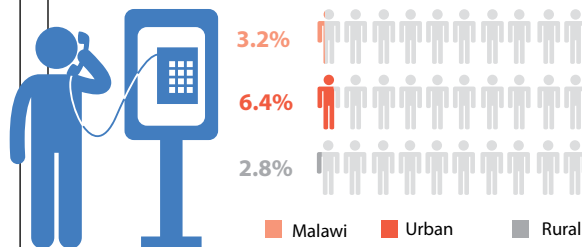


Figure 14: proportion of individuals using public phones by geographical location

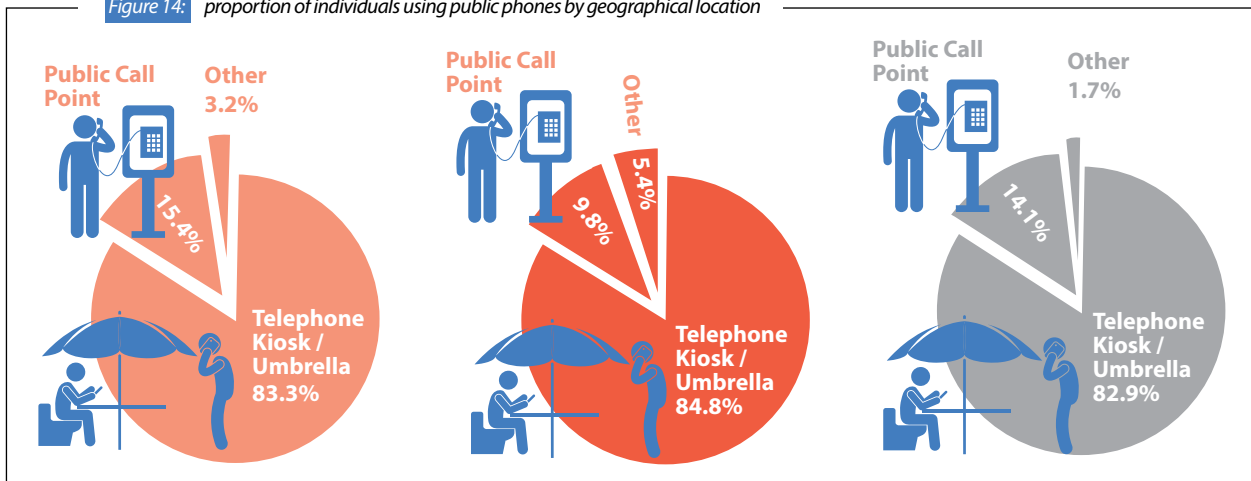
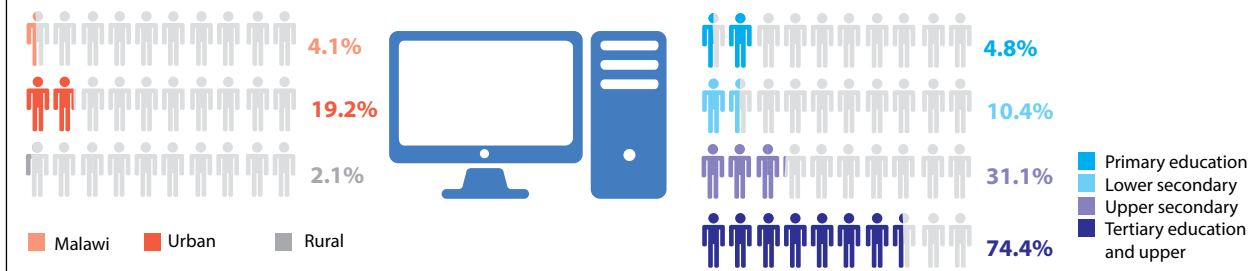


Figure 15: proportion of individuals who use a computer by geographical location



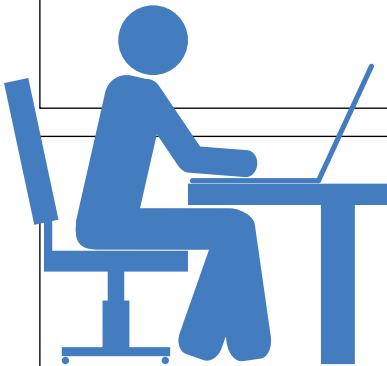
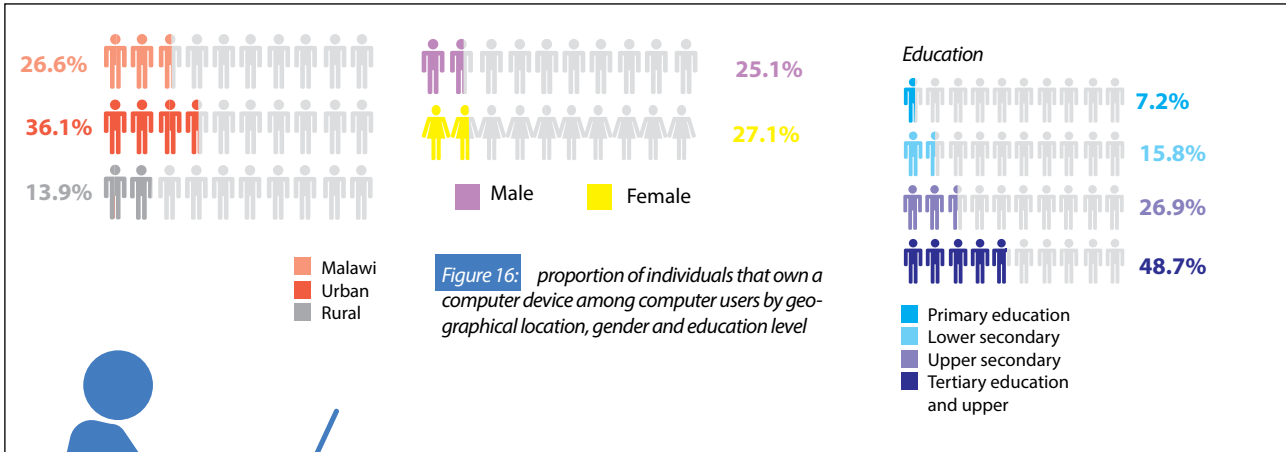
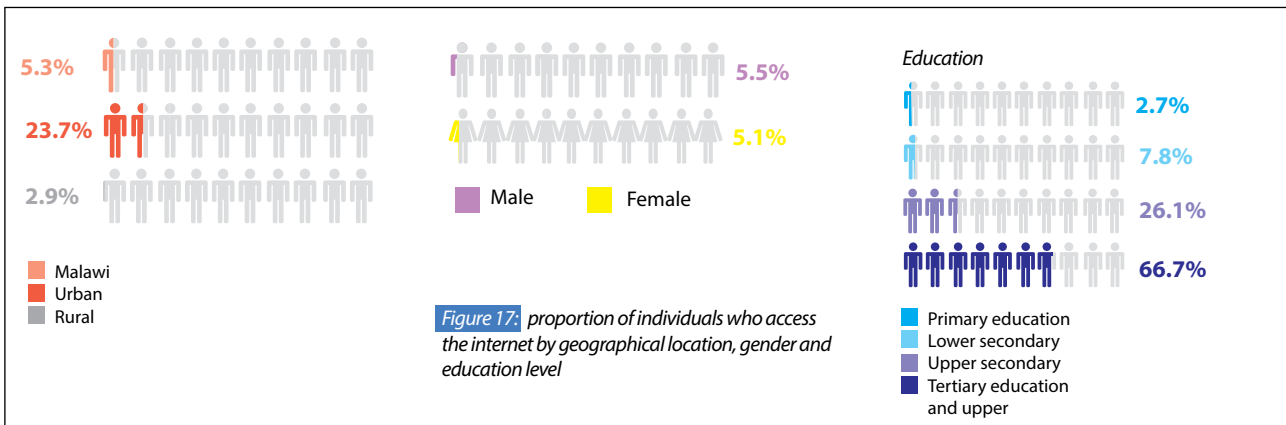


Table 6: location of using computer by geographical location

	Work	School	Library	Home	Internet café	Friends Place	Other
Malawi	33.1%	11.9%	1.6%	36.0%	8.5%	6.8%	2.2%
Urban	38.7%	9.5%	0.7%	40.5%	4.0%	5.5%	1.1%
Rural	26.0%	14.8%	2.7%	30.5%	13.9%	8.5%	3.6%



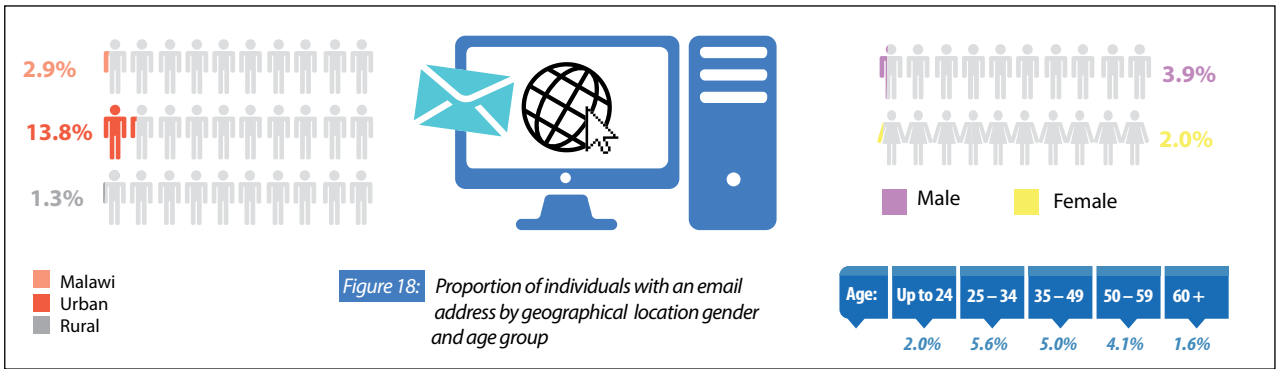


Figure 19: proportion of individuals who listen to radio and own a radio by geographical location

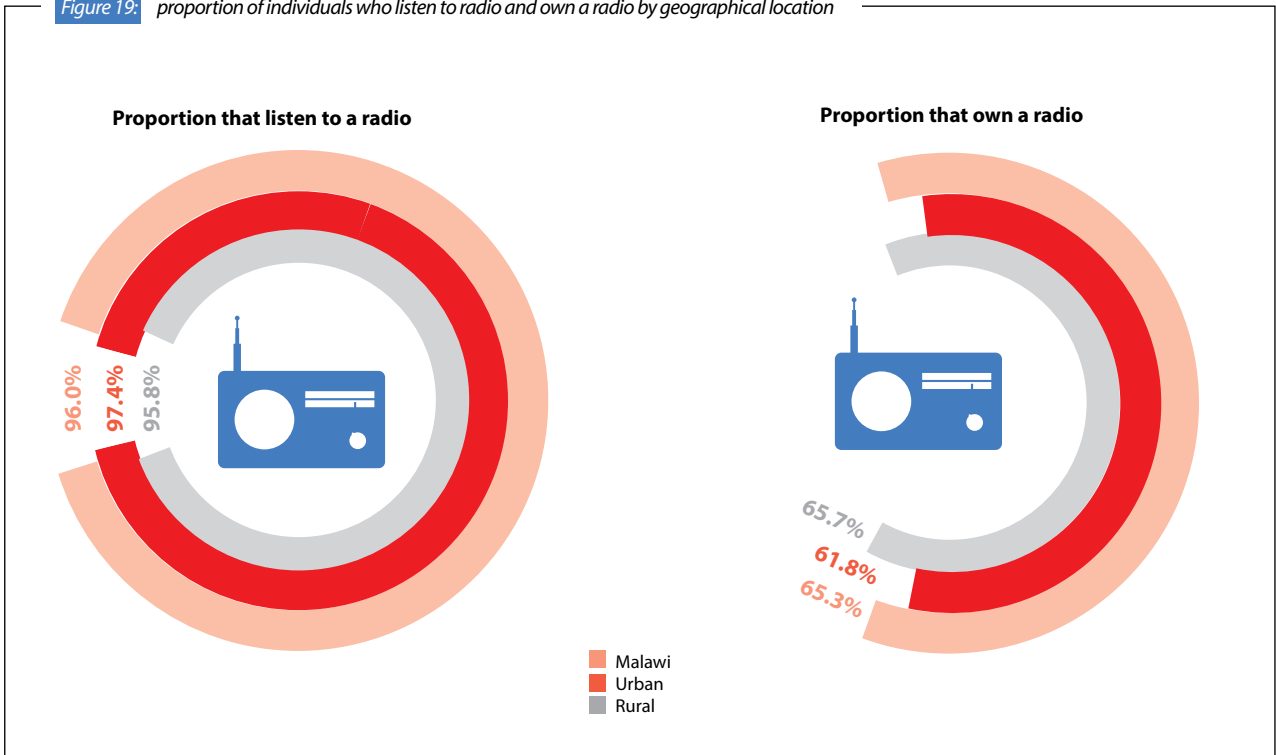


Table 7: *proportion of individuals listening to a national radio station by geographical location and region*

	<i>Malawi</i>	<i>Urban</i>	<i>Rural</i>	<i>Northern region</i>	<i>Central region</i>	<i>Southern region</i>
MBC Radio 1	80.2	71.2	81.4	80.8	80.6	79.6
Zodiak Radio	80.1	67.5	81.8	88.1	85.4	72.8
MBC Radio 2	58.1	42.6	60.3	58.5	67.6	49.2
Capital FM	26.2	88.3	17.7	6.9	32.6	52.9
Joy Radio	23.5	74.8	16.5	6.3	30.0	22.5
Radio Maria	16.5	12.7	17.0	7.8	15.0	20.4
Star FM	11.7	97.2	0.0	7.5	12.1	12.6
FM 101 Power	11.4	94.3	0.0	7.3	11.7	12.3
Galaxy Radio	9.6	14.6	8.9	6.3	9.6	10.5
Ufulu Radio	7.1	9.0	6.8	5.6	6.6	8.0
Radio Islam	4.9	3.4	5.1	0.3	1.2	9.7
TWR	2.7	3.2	2.6	0.7	3.6	2.4
CCAP BT Synod Radio	2.5	4.0	2.4	0.0	0.0	5.6
Maziko Radio	2.0	3.3	1.8	0.0	4.7	0.0
MIJ FM	1.1	6.8	0.3	0.3	1.2	1.2
Matindi Radio	1.1	9.0	0.0	0.8	1.0	1.3
Pentecostal Life FM	1.0	7.9	0.0	0.0	1.0	1.2
Adventist Radio	0.9	3.1	0.6	0.5	0.4	1.4
Living Waters Radio	0.4	0.9	0.4	0.0	0.0	0.9
Channel for All Nations Radio	0.2	1.2	0.0	0.0	0.4	0.0
CCAP Livingstonia Synod Radio	0.3	1.7	0.2	2.7	0.0	0.0
Yoneco FM	0.1	0.5	0.0	0.1	0.0	0.2
CCAP Nkhoma Synod Radio	0.1	0.8	0.0	0.0	0.3	0.0

Figure 20: proportion of individuals' times of the day they listen to a radio station

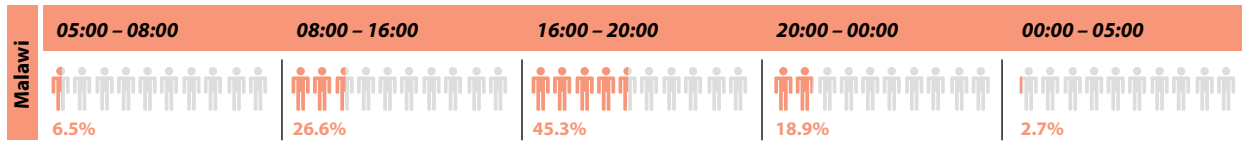


Figure 21: distribution of individuals who listen to a radio by most listened language

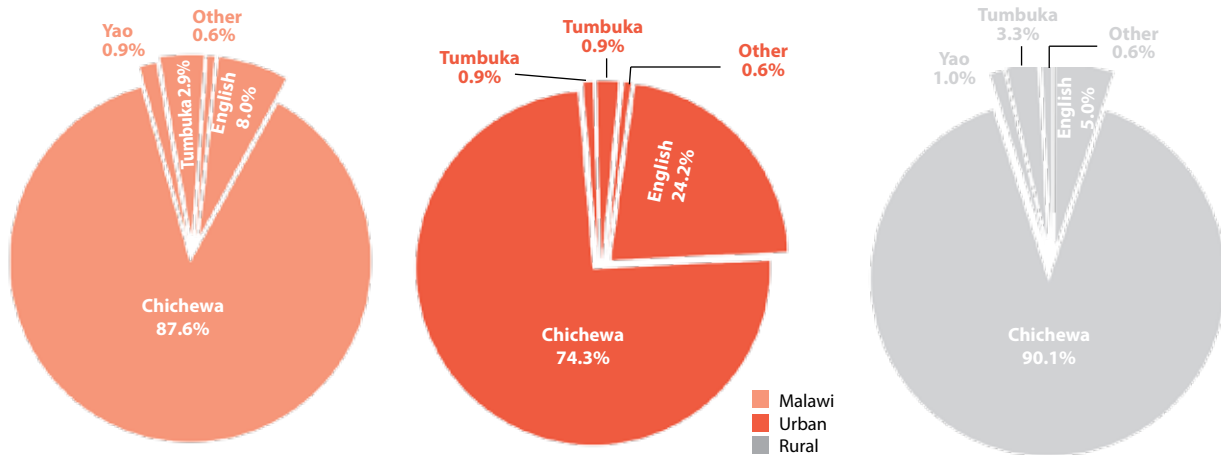
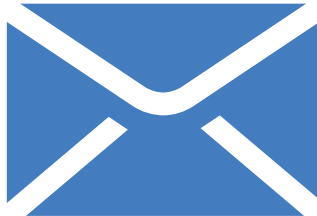


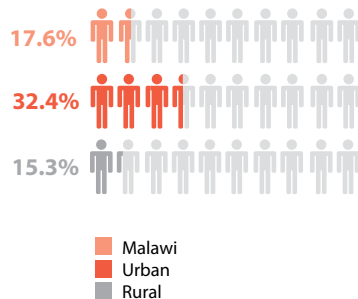
Table 8:

reasons for no post services by geographical location



	Post office is too far	Poor services	It is expensive	There is no post office	Use other means
Malawi	11.8	28.3	8.4	6.0	45.5
Urban	1.8	24.1	6.3	2.3	65.6
Rural	13.0	28.8	8.7	6.5	43.1

Figure 22: proportion of individuals who used a postal/courier service by geographical

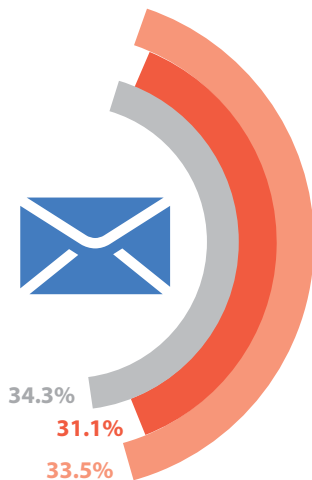


	Sending and receiving mail	Sending and receiving cash (fastcash)	Payment of bills	General correspondence (with business, organizations, government)	Sending or receiving parcels or packets	None	Other
Malawi	23.4	30.4	0.6	1.9	8.4	32.3	2.8
Urban	19.2	29.0	1.0	3.7	12.7	32.8	1.6
Rural	24.8	31.0	0.5	1.4	7.1	32.1	3.2

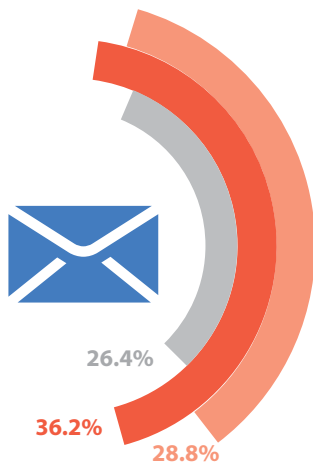
Table 9 Type of postal/courier services used in the past twelve months by geographical location

Figure 23: accessibility of post offices by geographical location

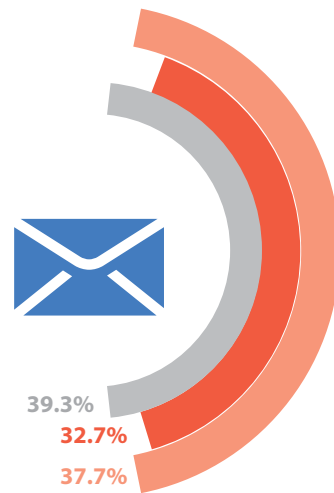
Within a walking distance



Reachable by car



Hard to reach





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