

Myanmar Monitoring Platform – Household Surveys

Results from the **May 2022**
high-frequency phone survey of
households
(Survey Period: 6 May – 10 June
2022)



Key findings

Tepid and uneven improvements in work and earnings; improvements in food security between Feb-May 2022



Employment & income losses

The February 2022 round had indicated lower instances of work stoppages than in January 2021, but higher likelihood of lowered earnings. This trend continued in May 2022.

Construction sector and female workers were particularly worse-off -- experiencing significant rise in work stoppages and reduced earnings between February and May 2022.

Note: employment includes formal & informal work opportunities. Work stoppages are instances of main household workers who were employed during the baseline period but stopped working in the 7 days prior of the survey.



Farm sector & food insecurity

More households reported a return to normal farm operations than in February 2022. But rising prices of farm and business inputs are a growing concern.

Food insecurity had worsened in February but improved in May 2022; severe food insecurity is yet to be eliminated.

Household coping mechanisms and mental health are increasingly stressed.



Coping mechanisms & social assistance

More households reduced consumption, borrowed from family and friends and depleted savings in May 2022 than in February 2022.

Assistance from the public sector, already at a low level in February 2022, has fallen even further in May 2022



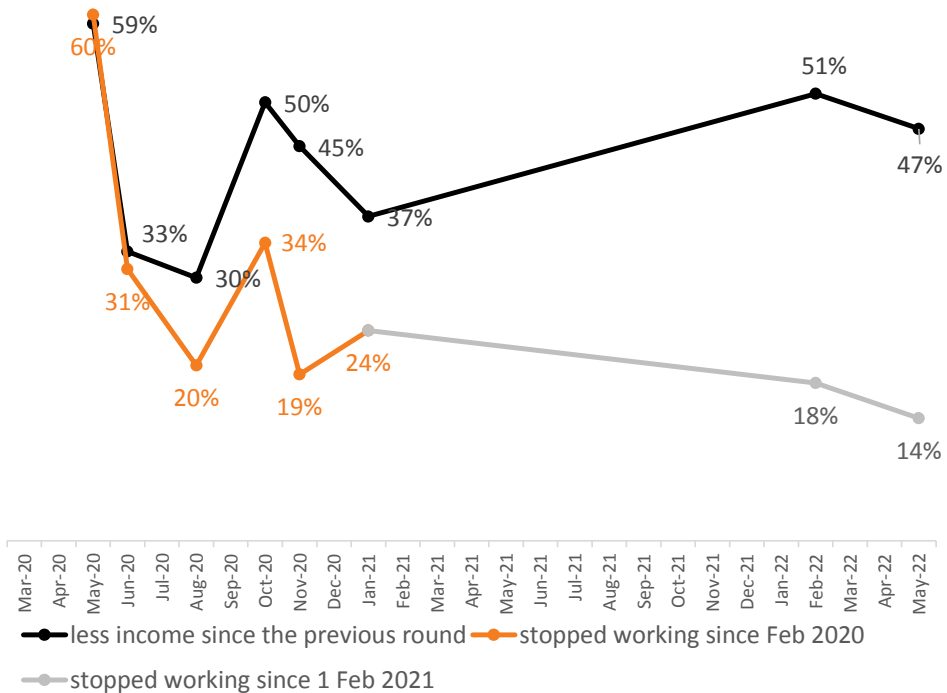
Health

All mental health indicators have progressively worsened in 2022, with elevated levels of anxiety and growing sense of hopelessness

Employment & income

Small reduction in household main workers reporting work stoppages in May 2022 but a high proportion continued to experience earnings losses

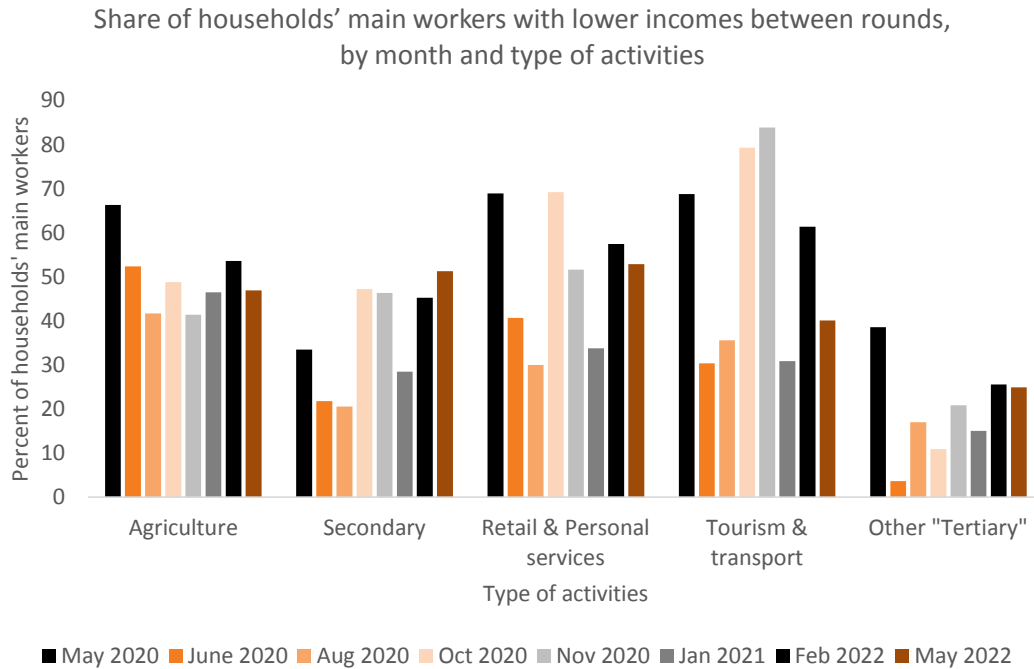
Fraction of household main workers reporting work stoppages and income losses



Note: Income losses are conditional on household main worker reporting work performed in the past 7 days of the survey

- 14% of household main workers had stopped working in May 2022 – 4 percentage points lower than in February 2022.
- Despite lower instances of work stoppages, almost half of all main workers reported receiving lower incomes between Feb 2021 – Feb 2022 and Feb 2022 – May 2022.
- 57% of female main workers experienced lower incomes in Feb - May 2022 compared to 46% of male main workers.
- Work stoppages among main workers was 13 percentage points higher in the construction sector during Feb – May 2022 and 9 percentage points lower for agricultural sector over the same period.

Share of households reporting reductions in incomes slowed in May 2022, except for construction where incomes continued to decline



40% of main workers in tourism and transport sectors reported earning contractions between Feb – May 2022. This signifies a deceleration in income contraction -- as 61% of tourism and transport main workers had reported reduced incomes between Feb 2021 – Feb 2022.

However, construction worker are experiencing a continued fall in their incomes. 29% of main workers in construction sector reported income losses between Feb 2021 – 2022. This share rose by 20 percentage points between Feb 2022 – May 2022.

Note: Note: Shares are conditional on households' main worker having worked in the last seven days and experiencing income losses since the past round.

Most households with non-farm businesses in 2021 were still operational in May 2022 but had lower earnings.



- **9 in 10** households that had a non-farm business in 2021 continued operations in Feb 2022 . In May 2022, the share of operational businesses fell to **78%**.



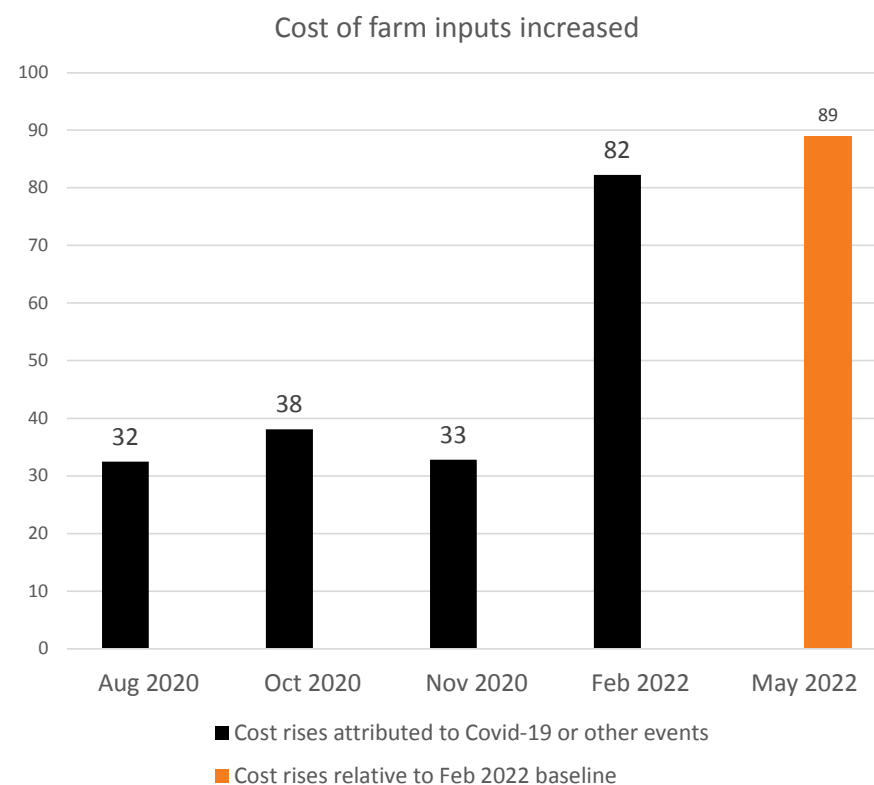
- **61%** of households' businesses had reported incomes falling between Feb 2021 – Feb 2022. The proportion of businesses reporting income losses were about the same in Feb 2022 – May 2022 , suggesting that business activity has remained muted.



- Of the businesses that reported income losses between Feb 2021 – Feb 2022, **45%** belonged to the retail sector. During Feb – May 2022, the share of retail sector within businesses experiencing earning contraction had risen to **57%**.

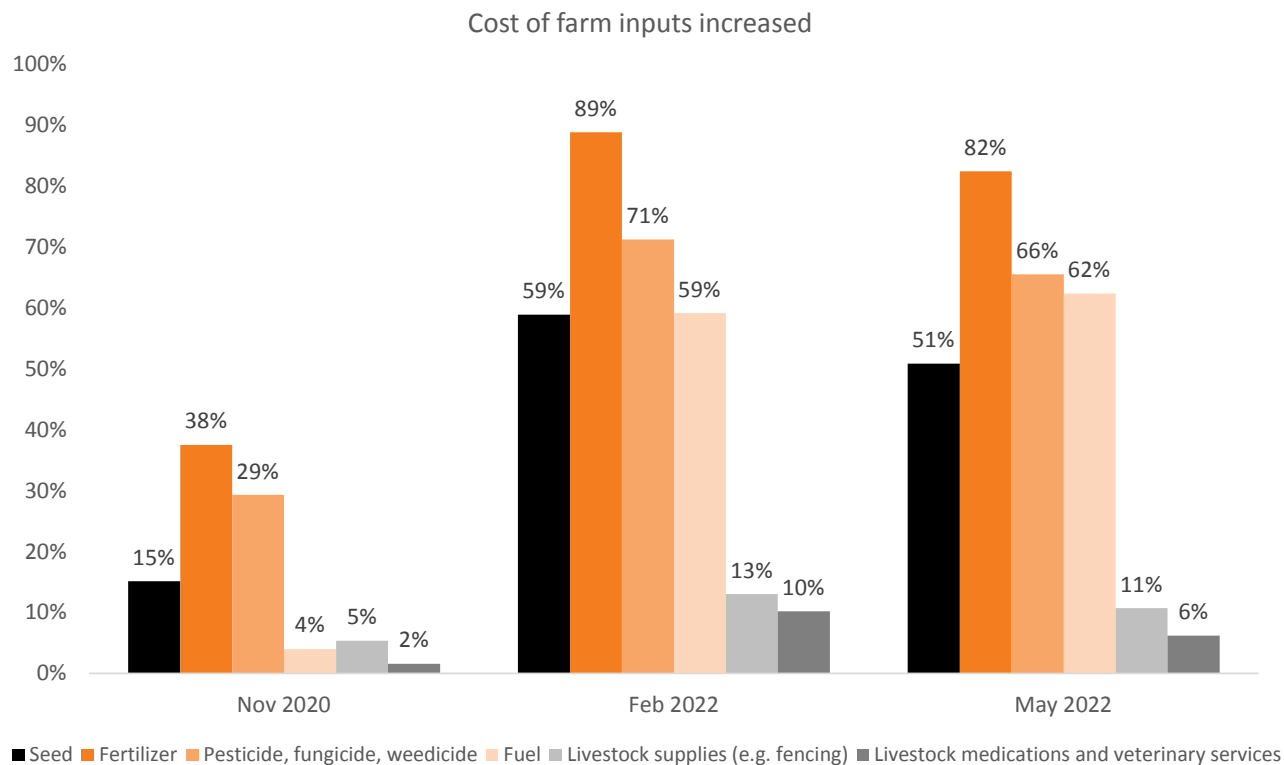
Share of farms reporting normal operations was higher in May than in Feb-22; but input costs have risen during this time

- 77% of households that had performed agricultural work in the past year reported normal farm activities in Feb 2022. By May 2022, the share of agricultural households reporting normal operations improved further by 13 percentage points (share of farms reporting normal operations is not depicted in the figure alongside).
- However, share of agricultural households that have had to stop farming operations has concurrently risen from 2% to 5% between February 2022 and May 2022 rounds, mostly due to shortages of hired labor or mobility constraints.
- Additionally, input costs have risen for almost all farms: nearly 90% of farms reported rising input costs between Feb – May 2022.



Prices of inputs for crop production and fuel have risen, hampering agricultural production.

- 82% of farms reported higher fertilizer prices in May than February 2022; followed by pesticide, fungicide, weedicide (66% of farms reported a price rise between Feb and May 2022); and fuel (62% of farms reported higher prices during the same time).
- Majority of farms were already experiencing higher input prices during the February 2022 round, as many interviews were conducted around the onset of the Ukraine war during late February 2022.

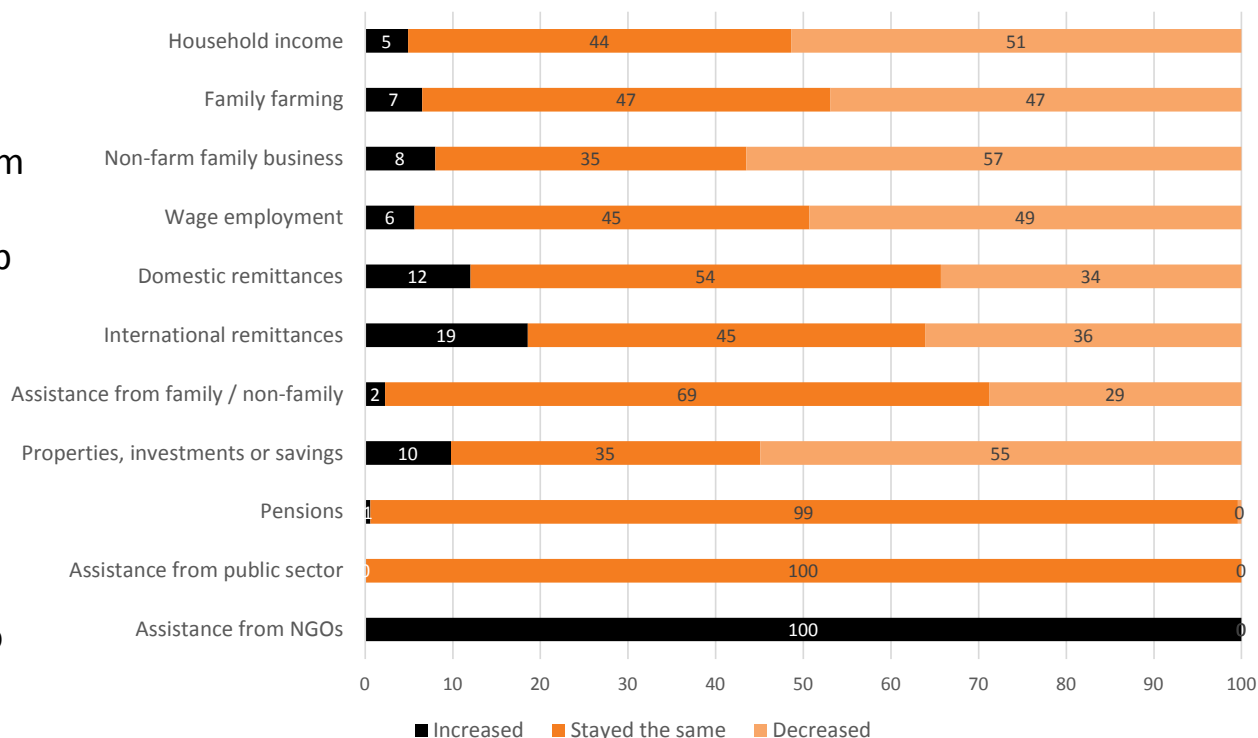


Input price rises in November 2022 and Feb 2022 were attributed to covid-19 and other events. Price changes in May 2022 were reported against Feb 2022 baseline.

Households continue to report reductions in income from a range of sources

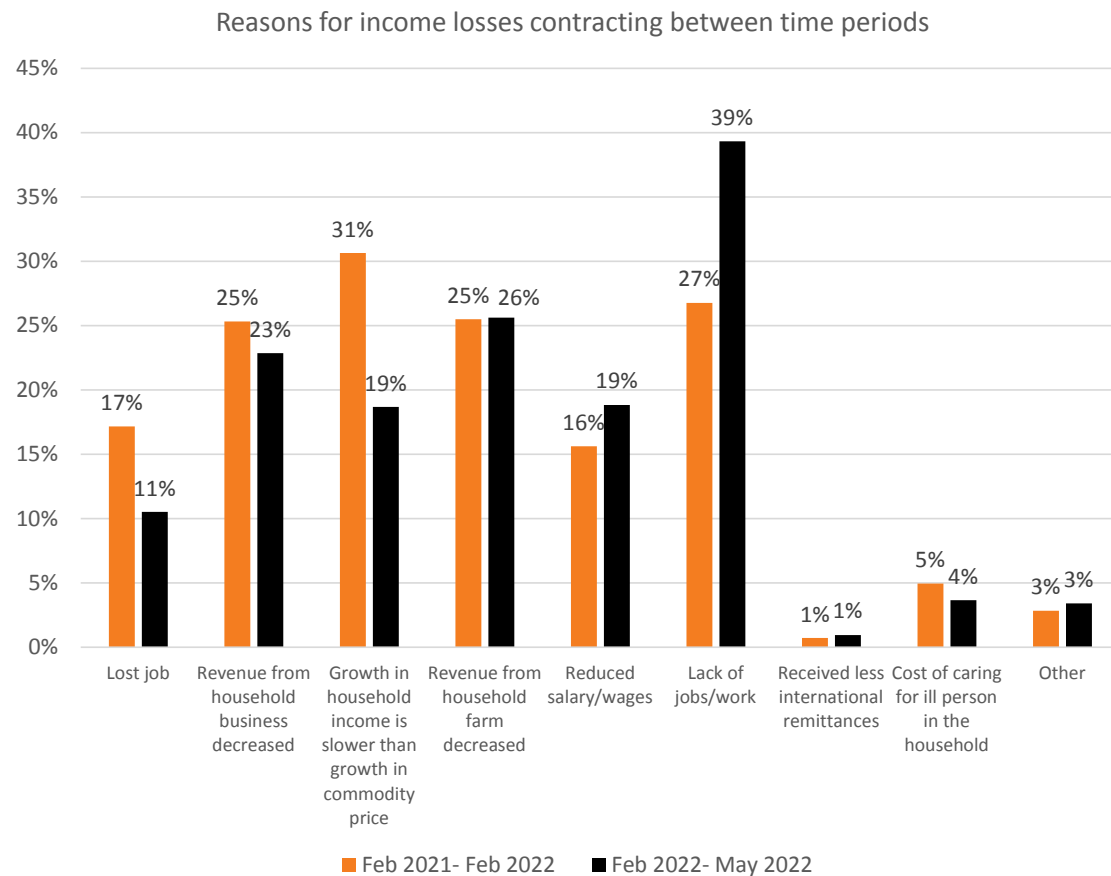
- Share of households reporting income losses between Feb 2021-22 and Feb-May 2022 has remained approximately the same at 50%
- 57% of households that received incomes from non-farm business in the past 12 months reported lower incomes in May relative to Feb 2022
- 55% of households receiving incomes from properties, investments and savings reported contractions during the same period.
- Almost all households receiving public sector assistance in the past 12 months, reported no change in assistance.

Percent of households whose income changed in May 2022 relative to Feb 2022



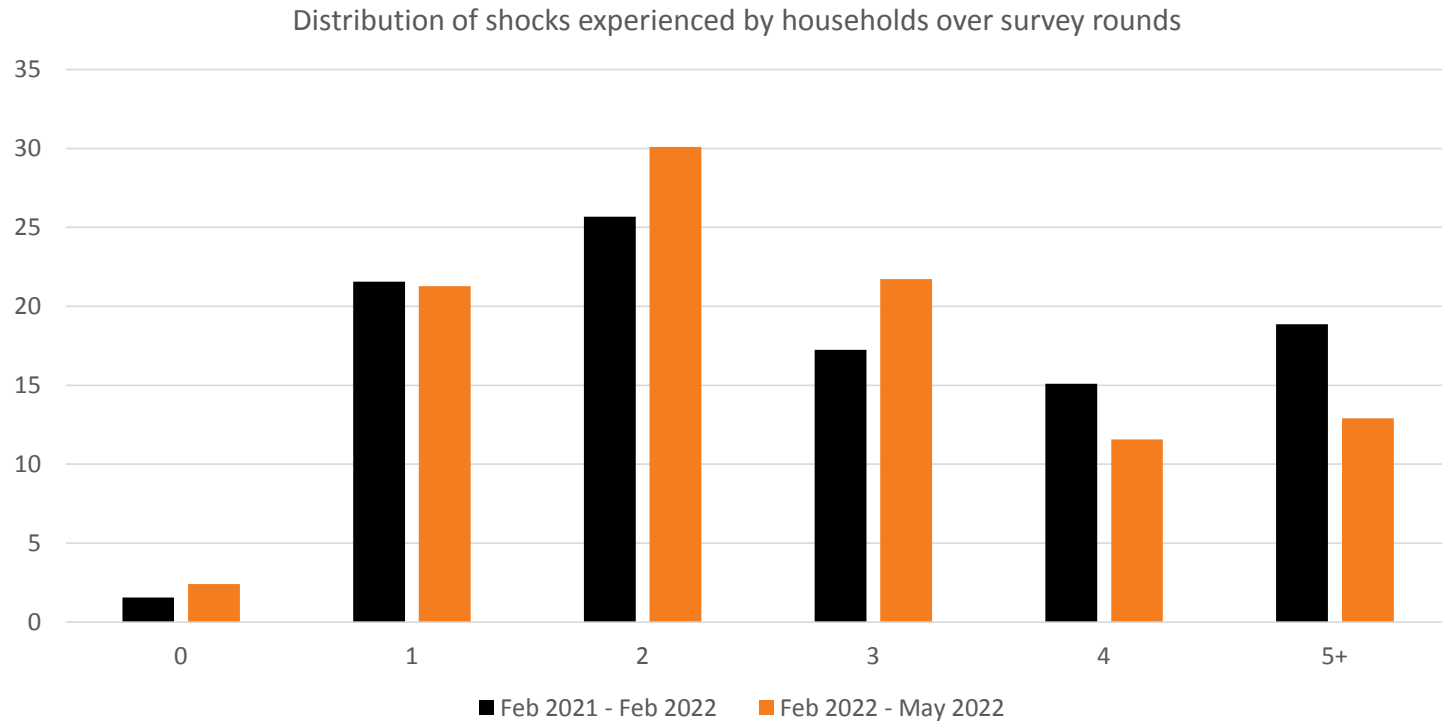
Note: the proportions in the figure are conditional on households receiving incomes from the source in the past 12 months

- Households are 12 percentage points more likely to cite lack of job opportunities or fewer working hours as the main reason for lower income during Feb-May 2022 than in Feb 2021-2022.
- This suggests that despite less work stoppages among household main workers observed earlier, concerns about the type of jobs that respondents desire or limited opportunities for members other than the main worker are still affecting households' income streams.



Note: estimates conditional on households receiving incomes income contractions between Feb 2021-2022 and Feb – May 2022.

77 percent of households experienced more than 1 shock between Feb – May 2022

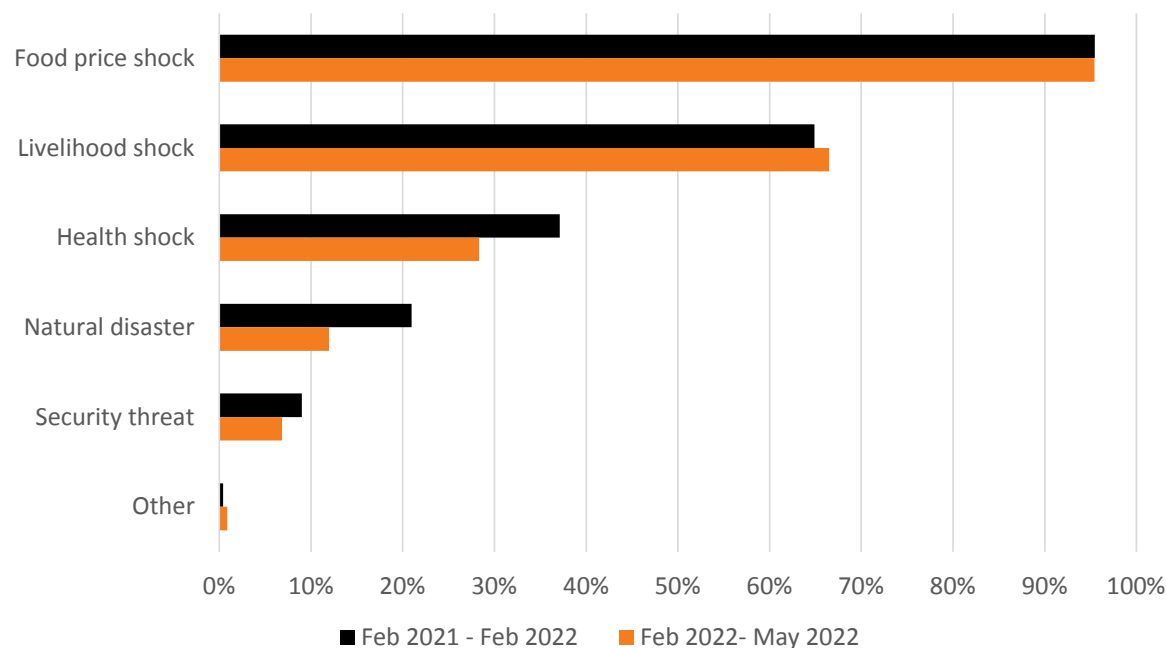


- Shocks included: food security, economic, health, natural disasters, security threat and others.
- Fraction of household experiencing multiplicity of shocks (more than 4) was 9 percentage points lower during Feb – May 2022 than in Feb 2021- 2022

Price shocks are becoming salient for businesses and farms

- Rising food prices continued to be a concern for the vast majority (95%) of households during Feb-May 2022
- Rising prices are however becoming salient for business and farms: share of households experiencing input price inflation in Feb-May 2022 was 8 percentage points more than Feb 2021-2022 (input inflation is aggregated into food price shock in the figure alongside and not shown separately).
- Health and natural disaster shocks moderated during Feb – May 2022 by 9 percentage points compared to the earlier round.

Percent of households affected by type of shocks over survey rounds



Note: Food price shock includes (i) increase in price of major food items. Livelihood shocks includes (i) job loss, (ii) closure of a non-farm business, (iii) disruption of farming activities, (iv) increased price of farming/business inputs, (v) reduced price of farming/business output, (vi) lack of availability of business/farming inputs, and (vii) reduction of farming/business output. Natural disasters includes (i) flooding, and (ii) drought. Security threats includes (i) theft/looting of cash and other property, and (ii) conflict or community violence. Health shocks include (i) illness, injury, or death of income earning household member.

Food insecurity

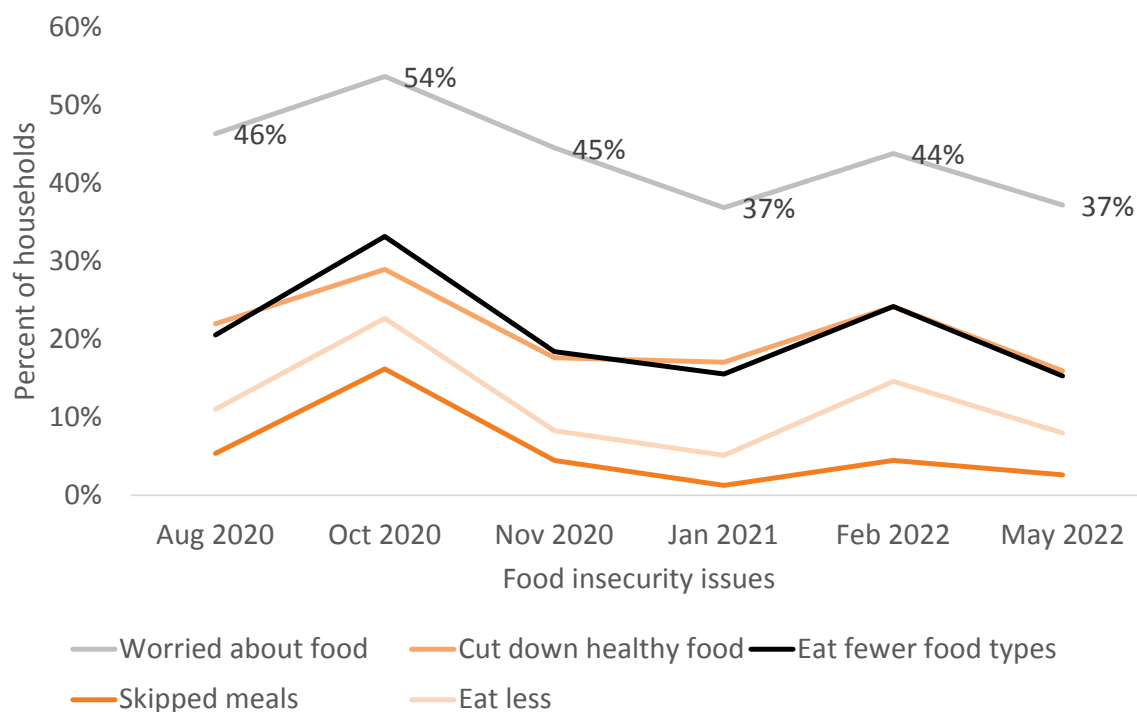
Aggregate food insecurity had worsened in February but improved in May 2022. However, food insecurity remains elevated for poorest households

Share of households worried about not having enough food to eat has fallen by 7 percentage points between Feb 2022 and May 2022 rounds, although food insecurity among poorest households persist.

Most severe form of food insecurity (being hungry or not eating for a whole day) is low at 3% (down 2 pp since Feb 2022) but yet to be eliminated.

Despite experiencing rising prices (slide 14) , households reported being less worried about food likely due to high shares of self-production: 60% of surveyed households were engaged in crop production.

Percent of households that experienced the following issues in fulfilling food requirements



Note: all questions were based on a 30 days recall and therefore comparable over survey rounds.

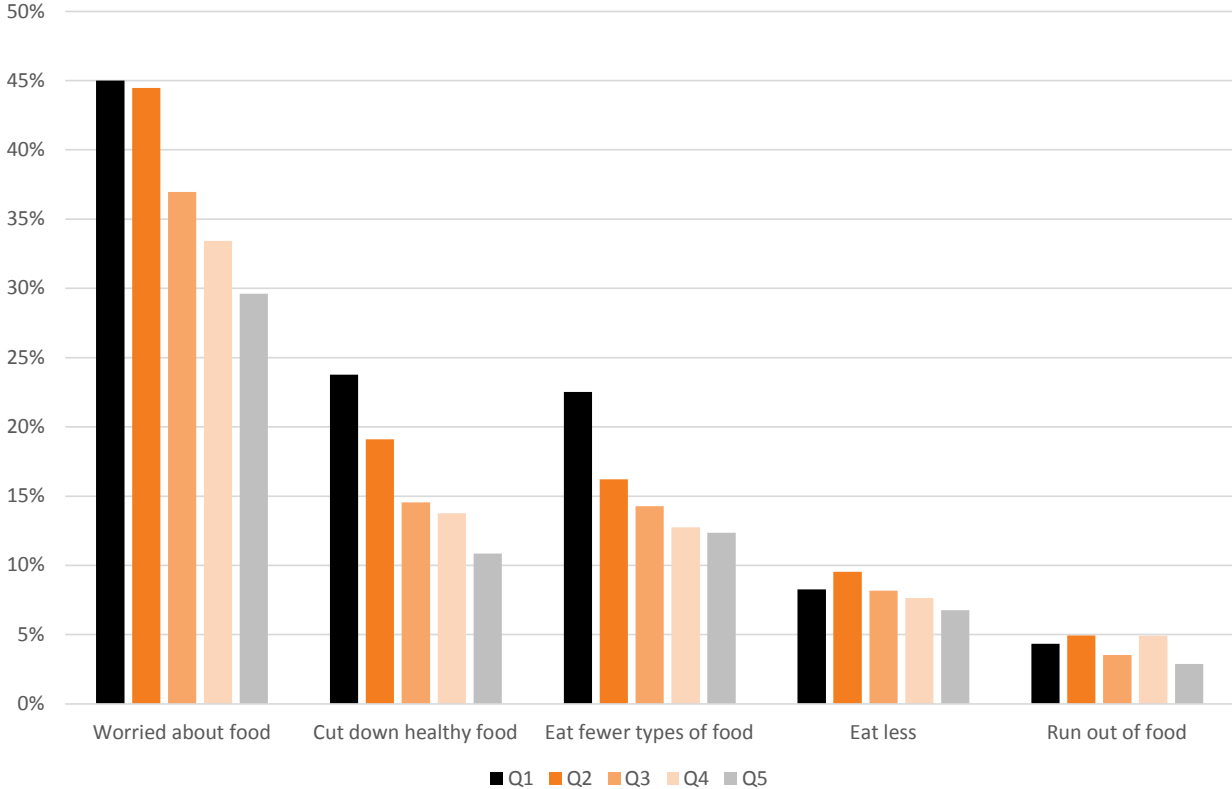
Aggregate food insecurity had worsened in February but improved in May 2022. However, food insecurity remains elevated for poorest households

Poorest households reported a higher likelihood of experiencing food insecurity than the richer ones in May.

For instance, bottom 20 percent of households (denoted as Q1 in the chart alongside) were 1.5 times more likely to be worried about food than top 20 percent.

However, the share of bottom 20 households experiencing food insecurity has fallen during May 2022 round compared to Feb 2022.

Percent of households facing issues fulfilling food requirements by quintile



Note: Q1 to Q5 represent the five quintiles of household consumption expenditure distribution. Q1 and Q5 respectively denote the bottom and top 20% households of the distribution.

Coping mechanisms & Public Sector assistance

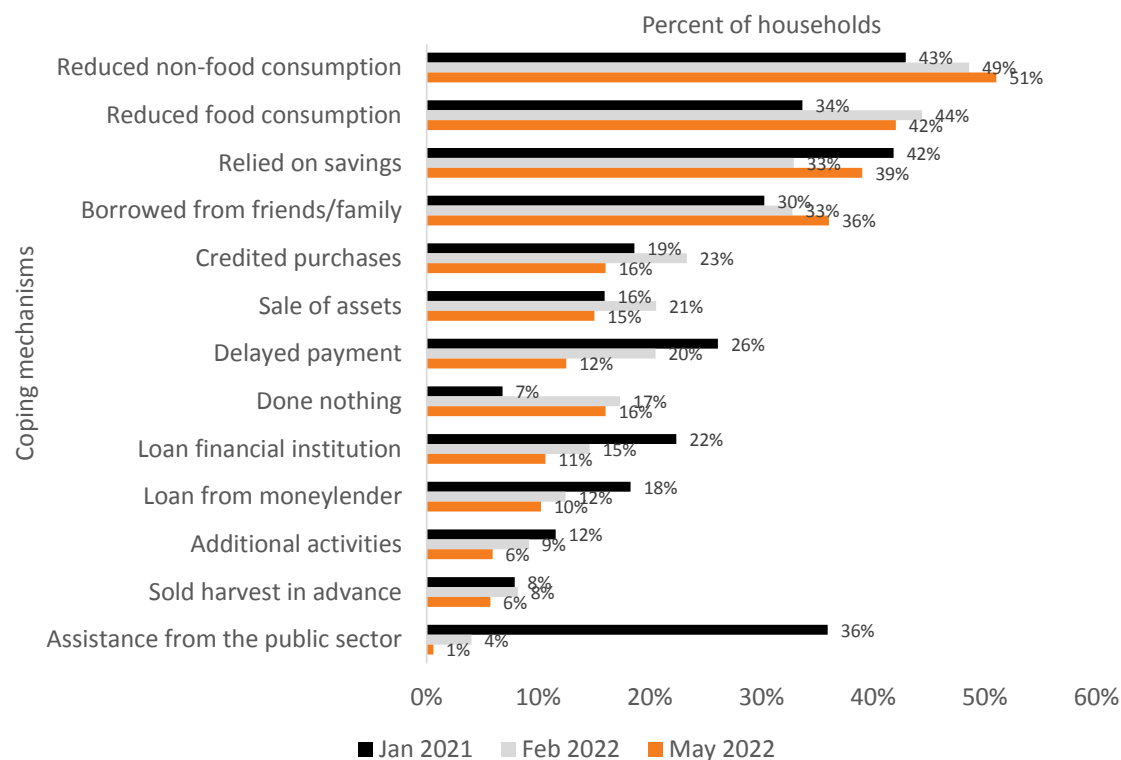
Households have not received assistance from the public sector

More households reported curtailed consumption, borrowing from family and friends and depleted savings in May 2022 than in February 2022.

Assistance from the public sector had declined sharply between January 2021 and Feb 2022. It has fallen further in May 2022 by 3 percentage points.

These coping mechanisms could have long-term negative impacts on households' capacity to fulfil their basic needs, strengthen their human capital, and ensure households' financial solvency.

Percent of households by coping mechanisms



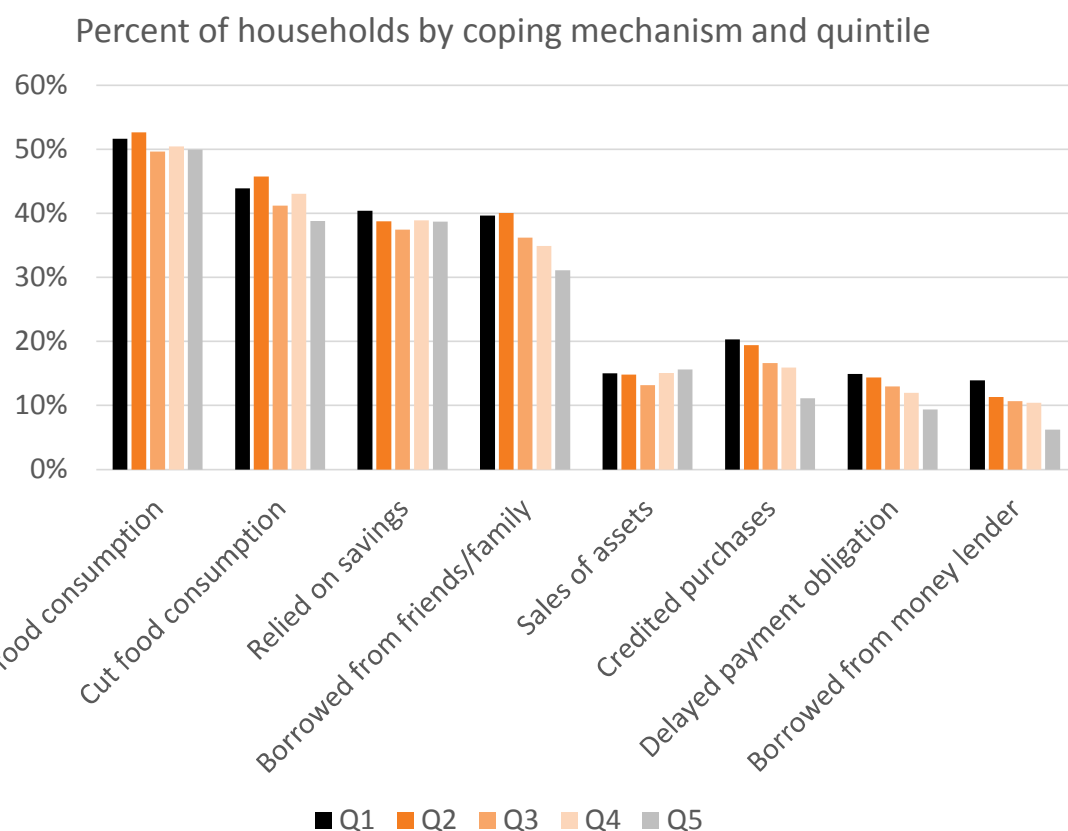
Note: Percent of households receiving public sector assistance are based on self-reported estimates from surveys. Estimates based on administrative data may vary. Coping mechanism is measured against a reference period of pre-March 2020, February 2021 and February 22 for Jan 2021, Feb 2021 and May 2022 respectively.

Poorer households continued to curtail consumption, rely on savings and borrow in May 2022

In February 2022, poor households were more likely to cut consumption or borrow as coping mechanisms than richer households.

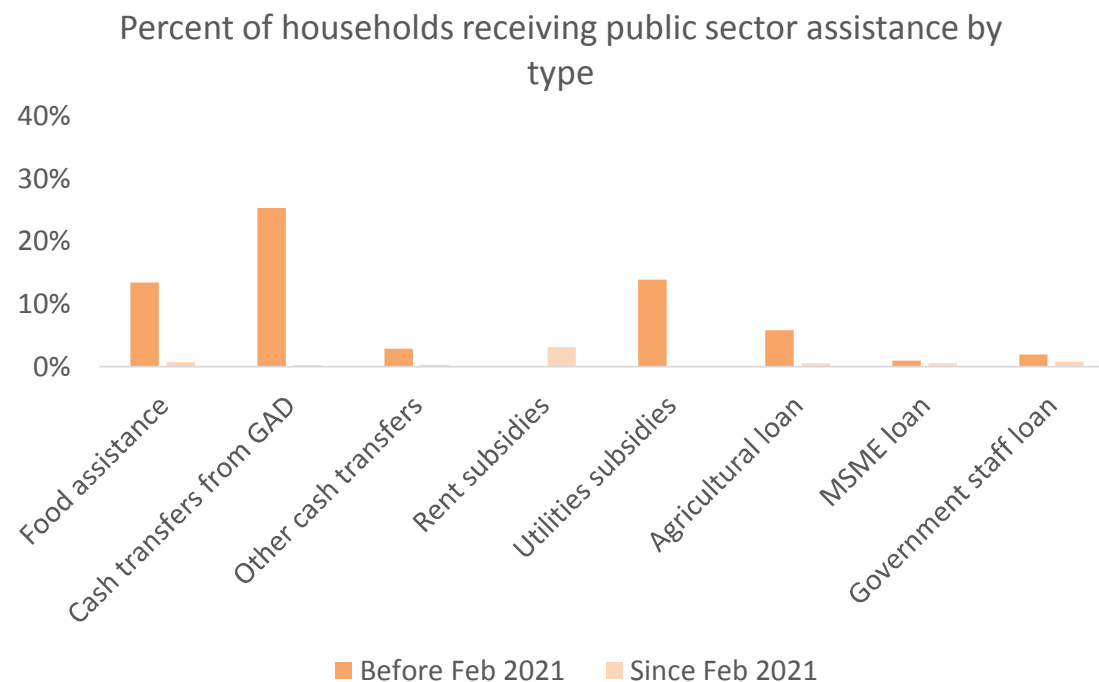
In May 2022, richer households are almost equally likely to report cuts to consumption as poorer households. Non-food items are more likely to be reduced than food products.

Proportion of poorer households resorting to borrowing is still higher than richer households in May 2022, but they are less likely to sell assets (14 percentage points), depend on credited purchases (7 pp) or resort to delayed payment obligations (10 pp) than in Feb 2022.



Note: Percent of households receiving public sector assistance for Jan 2021 was drawn from Round 7. Actual estimates may be higher.

Sharp reduction in cash and food assistance from the public sector between Feb 2021 and May 2022.

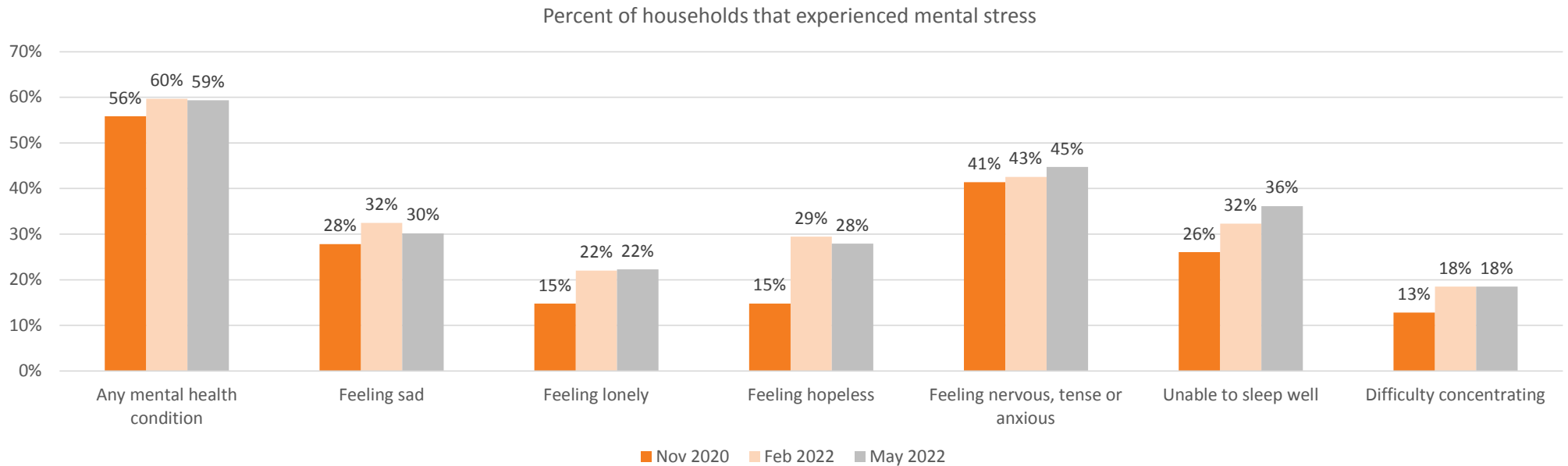


- Between February and May 2022, shares of households receiving assistance from the public sector has further fallen from an already low level. Cash transfers from GAD, the main channel for public sector assistance prior to Feb 2021 has been almost entirely curtailed.

Note: public sector assistance refers to support provided to households through ministries now under the military authorities

Mental Health

All mental health indicators have progressively worsened in 2022, with elevated levels of anxiety and growing sense of hopelessness

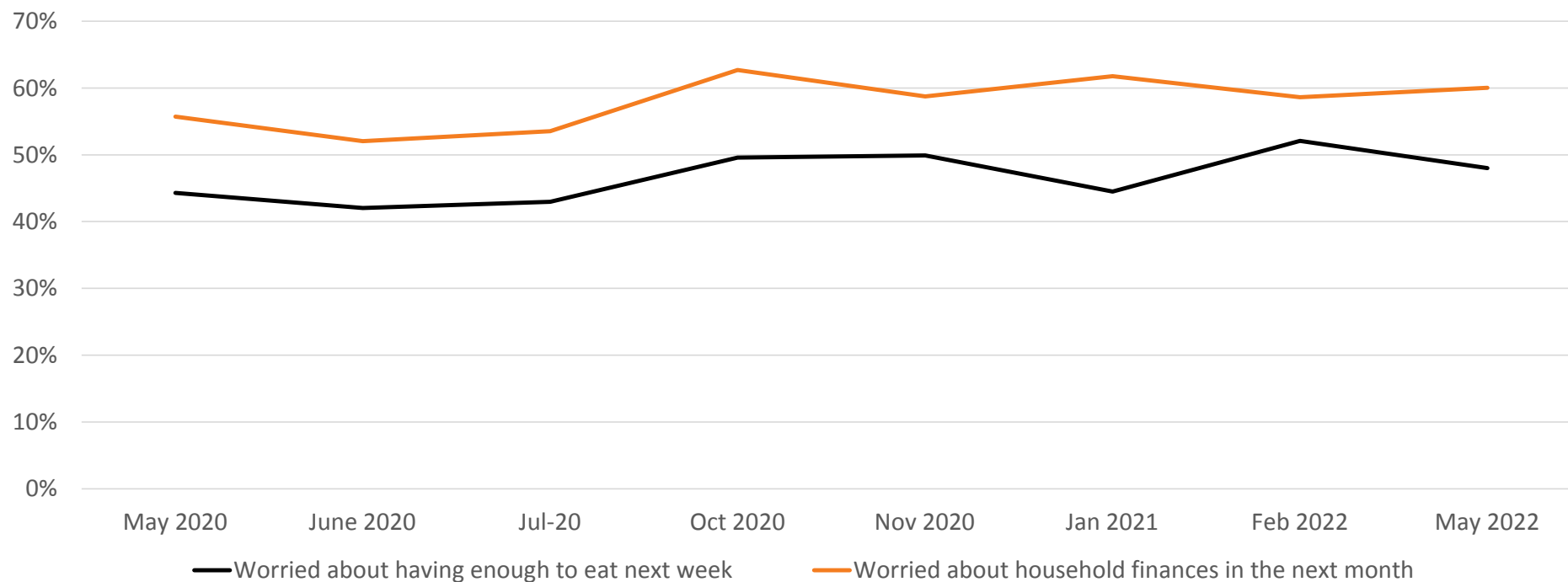


Note: all questions were based on a weekly recall and therefore comparable over survey rounds.

- Share of households unable to sleep well has risen by 4 percentage points since Feb 2022

Concerns about finances and having enough to eat are continuing to persist

Percentage of households worried about having enough to eat and finances



Note: all questions were based on household concerns for the upcoming week from the time of the survey. Worried about not having enough to eat in this graph pertain to the week-ahead; in slide 16, worried about food referred to households feeling concern about having enough food in the past 30 days.

Thank you

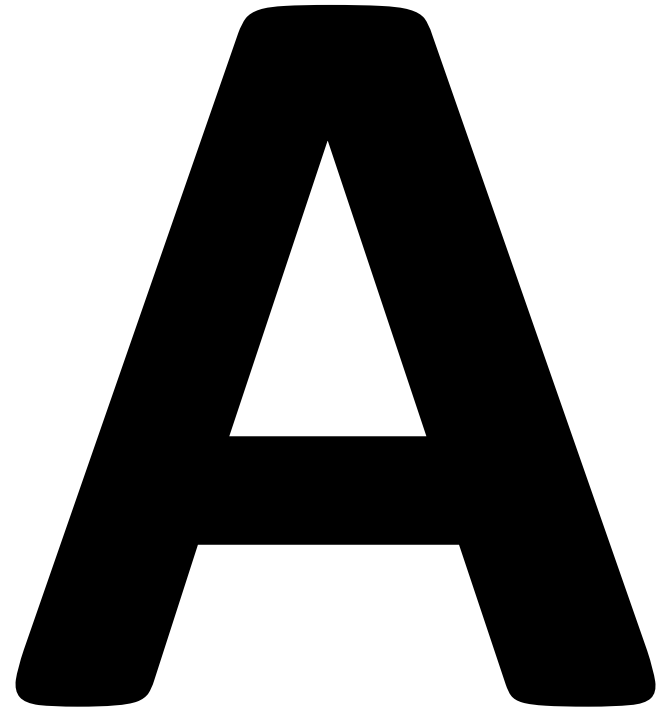
More information is available on

Myanmar Monitoring Platform – Household Surveys

And upon request
myanmar@worldbank.org

ANNEXES

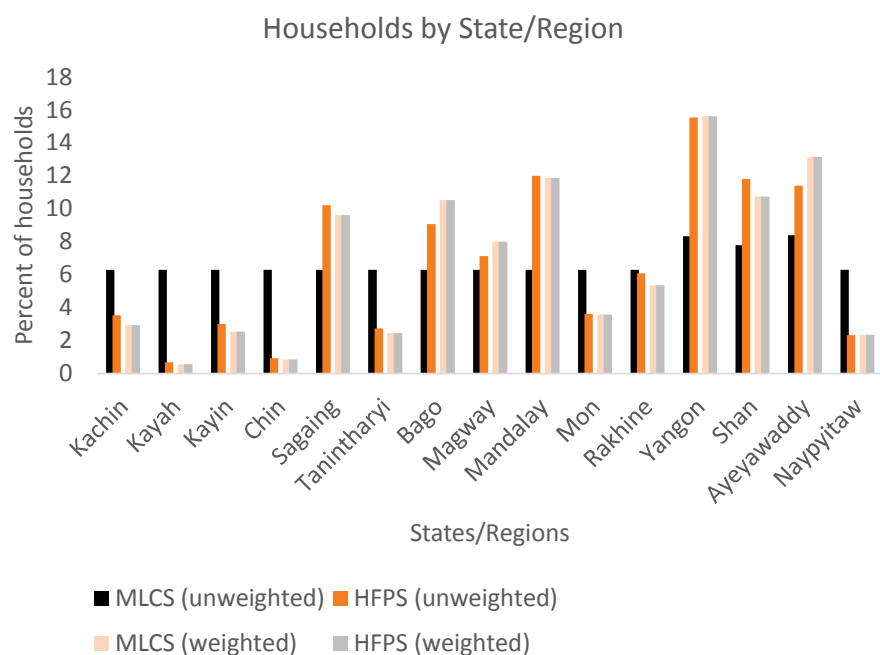
Survey design and sampling



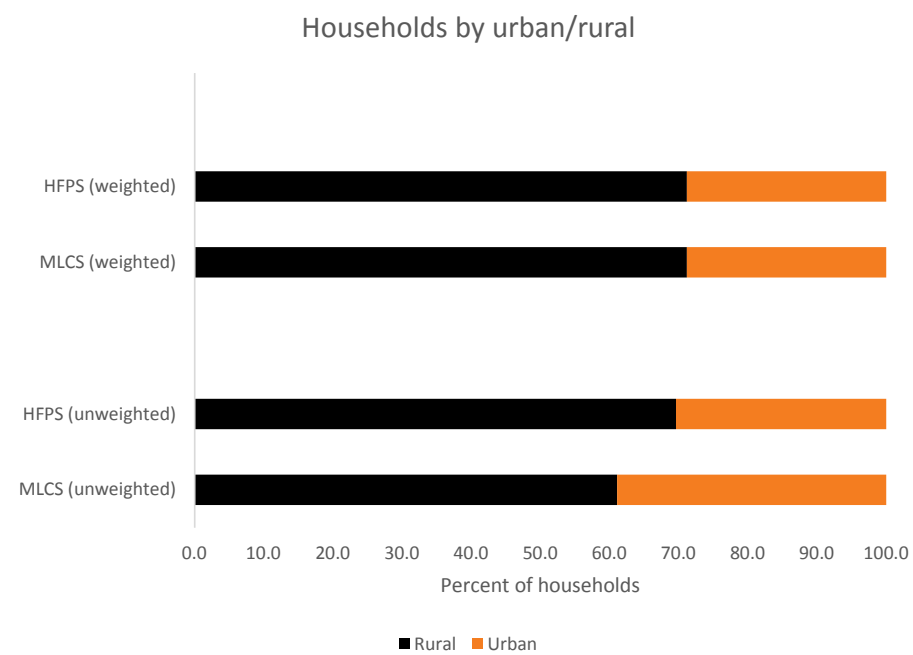
Design

- **Method:** Phone surveys were conducted monthly from May 2020 to May 2022 through a 30–40-minute phone interview of 1,500 households. The World Bank implemented Rounds 1-8, with technical and implementation support from the Central Statistical Organization for Rounds 1-6.
- **Tracked indicators:** Labor market and livelihood strategies, food insecurity and poverty, and households' coping strategies are recorded in all survey rounds. Questions relating to behavioral changes, access to health and education, and migratory trends will be asked in subsequent survey rounds as the situation unfolds.
- Respondents were sampled from an existing and consenting pool of respondents sourced from a private firm. Respondents were adult women and men, irrespective of their household responsibility status.
- Sample was weighted to assure representativeness of estimates at the Union level.

Similarity of sample distribution of MLCS 2017 and HFPS 2020...

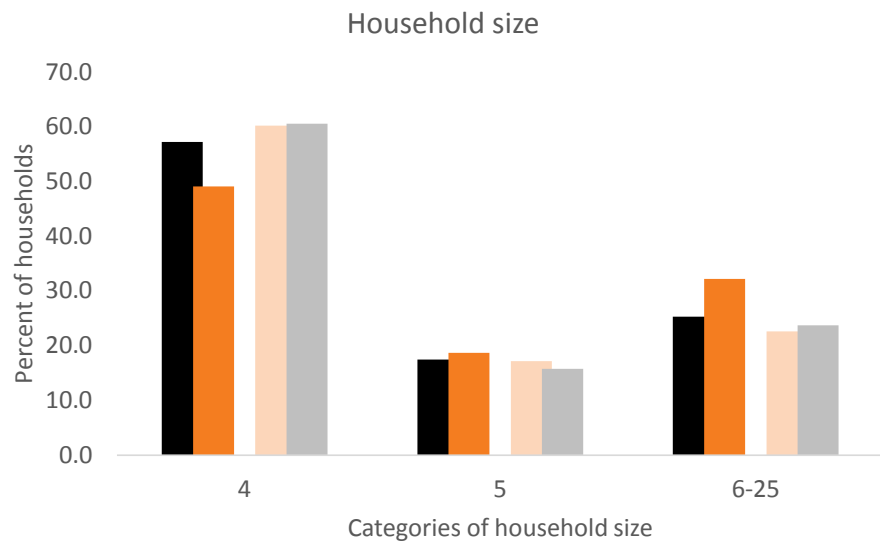


MLCS: Myanmar living conditions survey (2017)
 HFPS: High-frequency phone survey (2020)



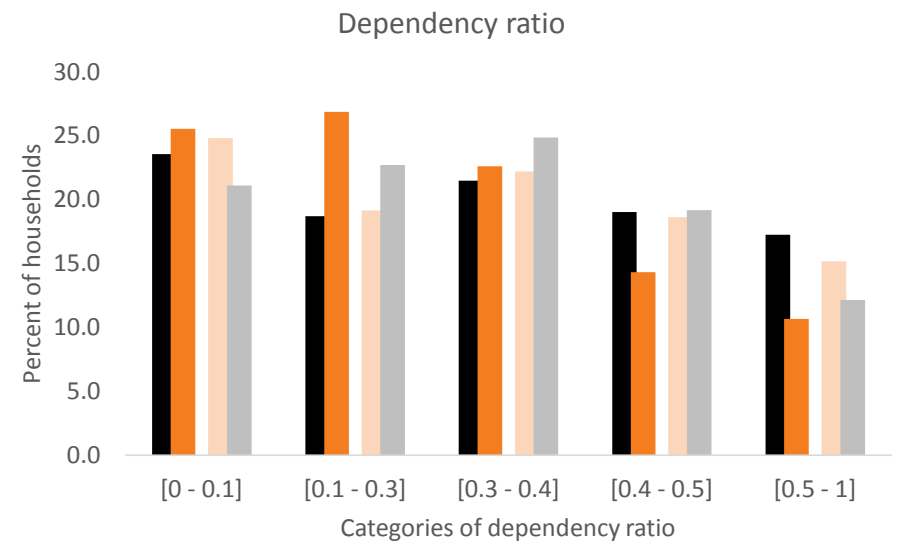
MLCS: Myanmar living conditions survey (2017)
 HFPS: High-frequency phone survey (2020)

... strengthening confidence of representativeness of the HFPS



■ MLCS (unweighted) ■ HFPS (unweighted)
 ■ MLCS (weighted) ■ HFPS (weighted)

MLCS: Myanmar living conditions survey (2017)
 HFPS: High-frequency phone survey (2020)



■ MLCS (unweighted) ■ HFPS (unweighted)
 ■ MLCS (weighted) ■ HFPS (weighted)

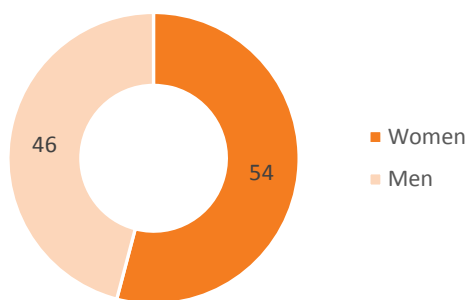
Dependency ratio: share of children (0-14 years old) and elderly (65 years old and over) over adults

Characteristics of surveyed population

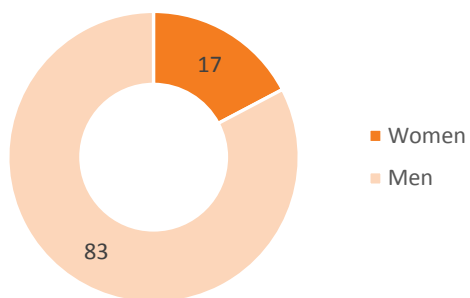
B

The HFPS drew from a representative and diverse sample of respondents and households

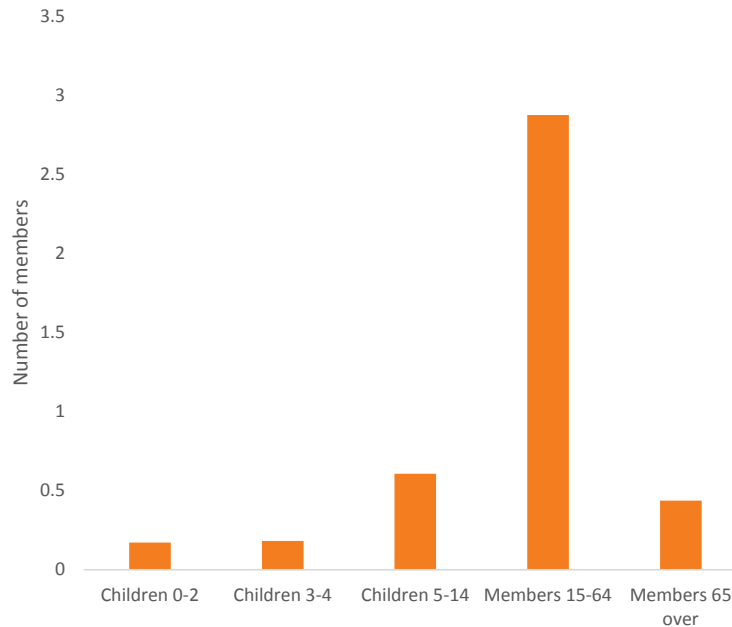
Gender



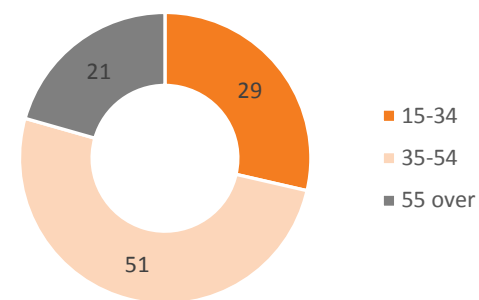
Gender of household head



Household composition



Age groups



Main language spoken

