BRANDING SEMINAR - HAVAS RIVERORCHID
YANGON - 14TH OF MARCH 2018

YANGON / MYANMMAR

h
havas
riverorchid

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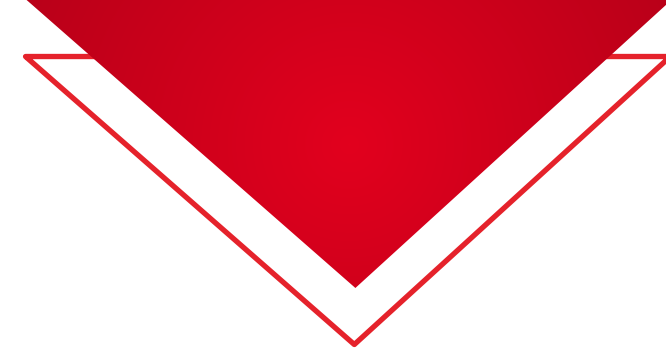
havas

86	335	135	19,350
countries	offices	cities	people

HAVAS IN INDOCHINA

5 countries

5 cities

5 offices

300 people

BANGKOK/THAILAND   YANGON/MYANMAR   PHNOM PENH/CAMBODIA   VENTIANE/LAOS   HO CHI MINH/VIETNAM

OUR MOJO

Indochina is our sole focus.

We operate as one agency in one region - *Indochina* - although we happen to be located in five different cities.

Indochina's most local, most global integrated offer, combining unparalleled
local know-how with world-class tools, technology and capability.

LOVING
KNOWING
LIVING
INDOCHINA

HAVAS RIVERORCHID/Myanmar

- A 360° Advertising Agency -

50 talented staffs

10 passports – multiple languages

Diverse & Unique

"Our constant aim is offer solutions which are not only custom-perfect for Myanmar, but are delivered in a manner which is cost-efficient, quick, and with the best quality."
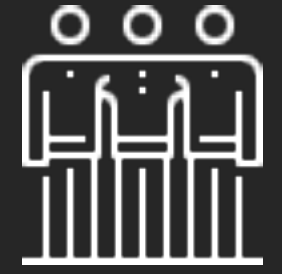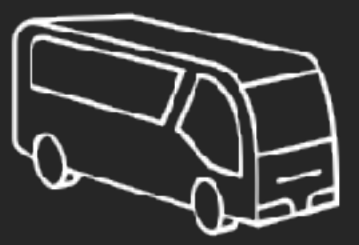
Our Core Capabilities

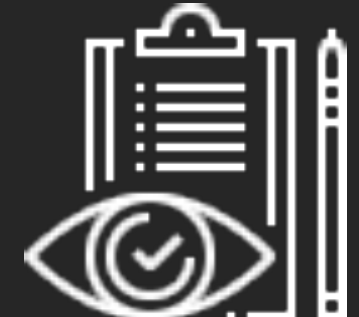|			
BRAND STRATEGY	ADVERTISING	SOCIAL MARKETING	ACTIVATION & EVENT
PLANNING & BUYING	CREATIVE & DESIGN	CONTENT DEVELOPMENT	MOBILE MARKETING
SOCIAL MEDIA & SOCIAL LISTENING	RESEARCH & BRAND HEALTH TRACKING	INFLUENCER MARKETING	DIRECT MARKETING

Our Clients

MEDIA USAGE
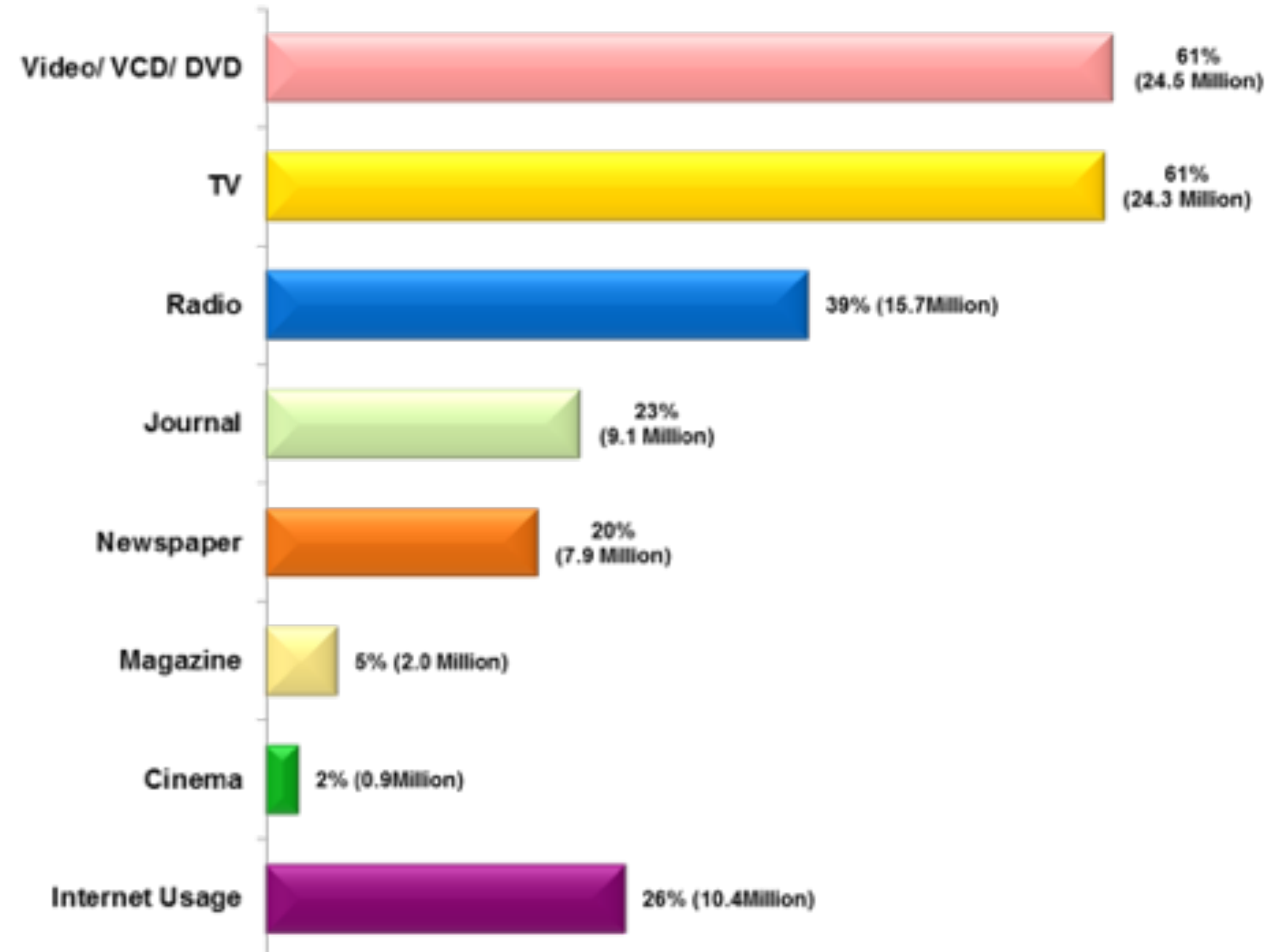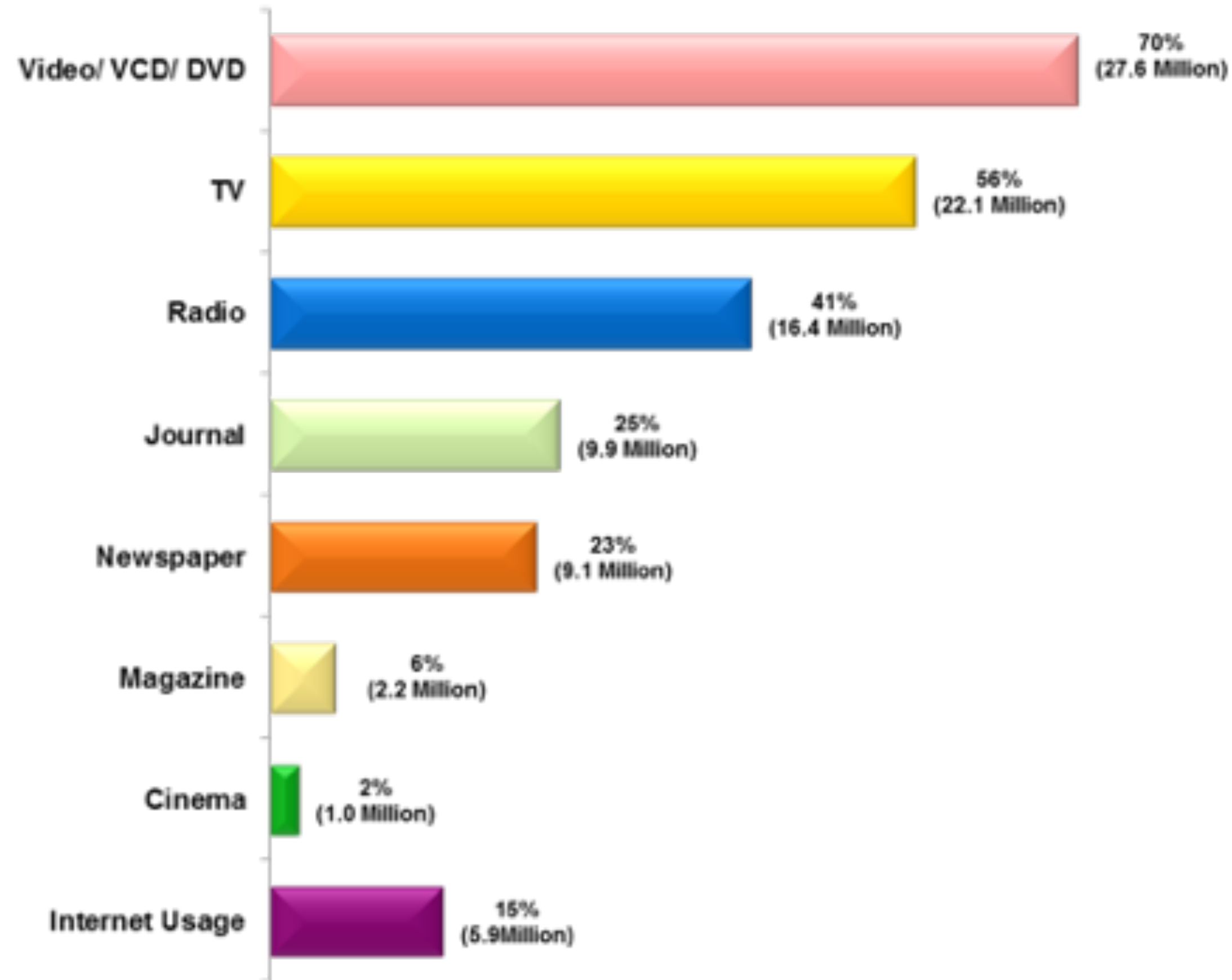
Digital Development Journey

2010
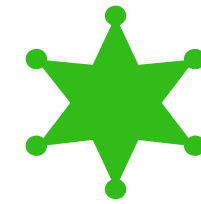
- Internet penetration: 0.8%
- MPT on Monopoly
- Sim card cost: ~$1500

2011

- Government reduces online censorship

2012

- Mobile penetration: 9%
- Internet penetration: 1%

2014-2015

- Oreedoo & Telenor enter the market and provide 3G.
- 6% of all smartphone world supplies coming to Myanmar (4th in the world).
- Sim card cost: $1.50
- Mobile penetration: 50%
- Internet penetration: 12.5%

2016

- Oreedoo launches the country's first 4G data Telenor & MPT follow.
- Sim card cost: $1.00
- Mobile penetration: 90%
- Internet penetration: 19.3%
- Smartphone usage: 80%

Myanmar is known as a **Leapfrog Nation** skipping the desktop computer to go directly to mobile internet (smartphones, tablets...)

Digital Landscape Overview

Summary

Internet users: 14.0M
% penetration: 26%

Social Media users: 14.0M
% penetration: 26%

Mobile subscription: 50.56M
% penetration: 93%

Social Media & Mobile

Monthly Active Users

Facebook - 14.0M
Nielsen – 10.6M

% Users accessing via Mobile
93%

% Users accessing FB Daily
49%

Male Profiles
64%

Female Profiles
36%

Share of Web Traffic by Device
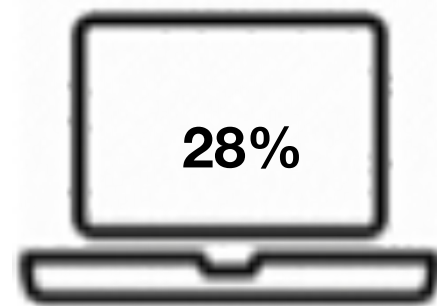
28%
Laptop & Desktop
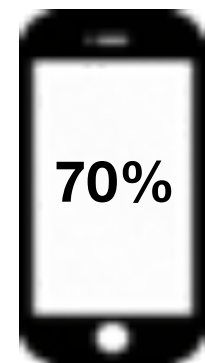
70%
Mobile Phones
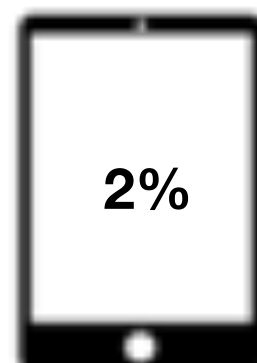
2%
Tablets

- Facebook would account on the majority of all social media platforms.
- As mentioned above, mobile users usually have more than 1 SIM card.
- Based on historical data collected for the past 6 months in-house. Mobile access would account to more than 90% of all online traffics.
- Inventory genres are Arcade games, sports, fun and entertainment, travel, music and videos, money and finance, utilities, news and magazines, transportation, lifestyle, shopping etc.

Transportation
5%

Utility & Commerce
10%

Social & Communication
40%

Entertainment & Games
45%
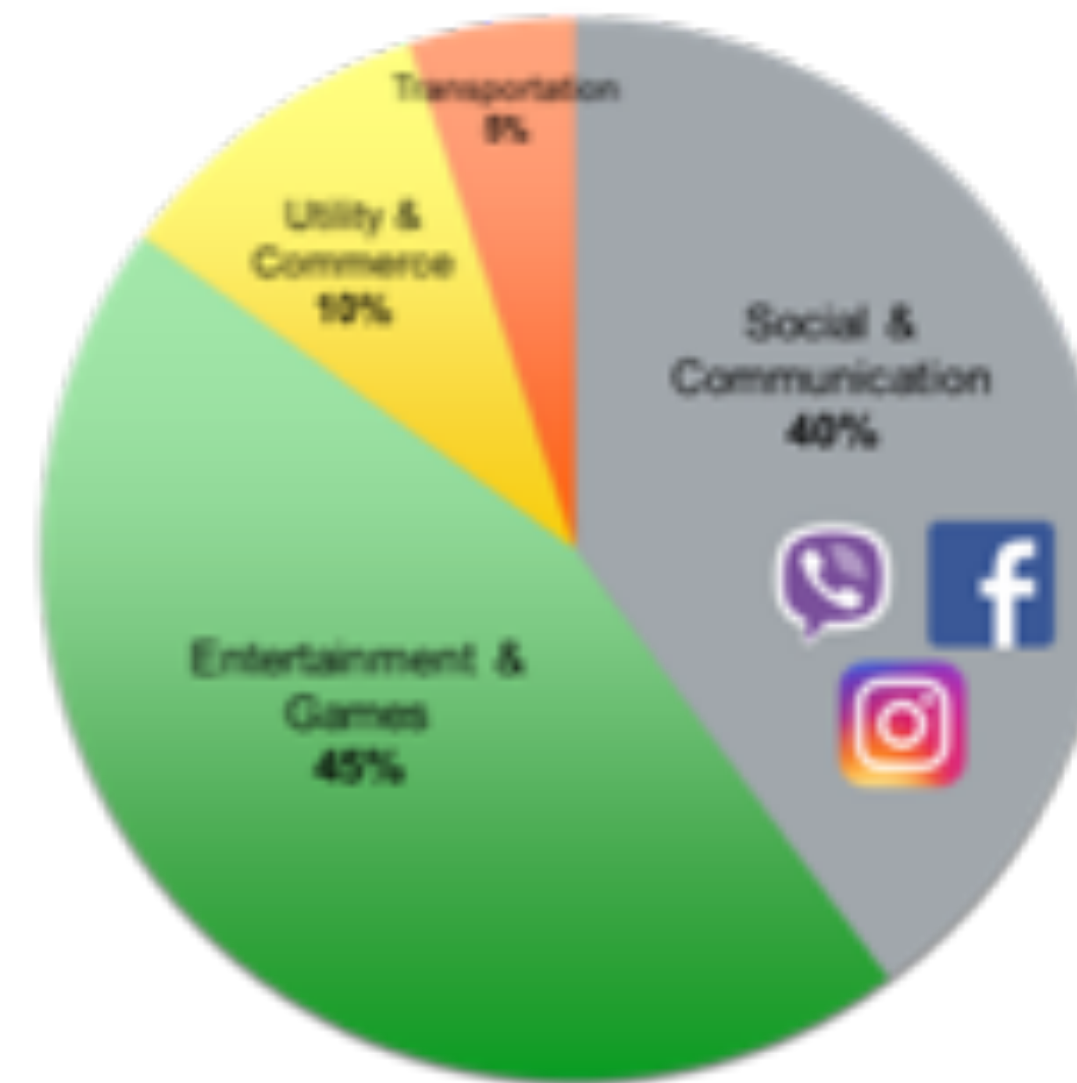
80 mins — Users time spent on other apps & content

70 mins — Users time spent on 1st Social apps (walled gardens)

OUR TREMENDOUS DATA GOLDMINE - PROSUMER REPORT

Havas partners every year with Market Probe International to survey 12,168 men and women ages 18+ in 32 markets including Myanmar on several trendy topics

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Argentina, Australia, Belgium, Brazil, Cambodia, Canada, China, the Czech Republic, Denmark, Ecuador, France, Germany, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Myanmar, the Netherlands, the Philippines, Poland, Portugal, Russia, Saudi Arabia, Singapore, South Africa, Spain, the United Arab Emirates, the United Kingdom, and the United States.

ABOUT THE STUDY

SAMPLE IN MYANMAR

331 PEOPLE

49% MEN

51% WOMEN

MILLENNIAL	GEN X	BOOMERS
41%	**36%**	**23%**
AGE 18-34	AGE 35-54	AGE 55+

SO FAR WE CONDUCTED THE RESEARCH FOR THESE TOPICS

FOOD
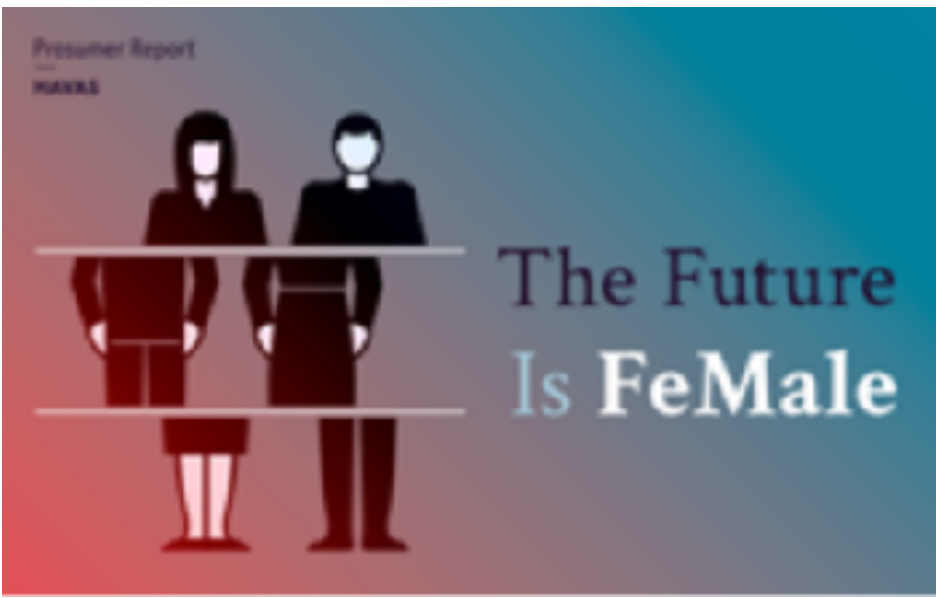
MONEY

TECHNOLOGY

GENDER

SO FAR WE CONDUCTED THE RESEARCH FOR THESE TOPICS

FOOD

MONEY

TECHNOLOGY
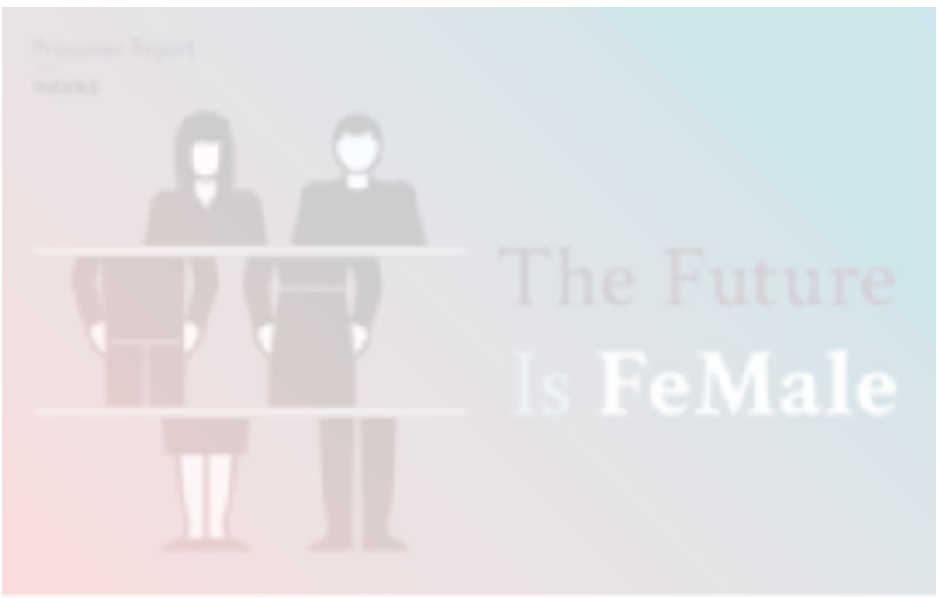
GENDER

"JUNK FOOD/UNHEALTHFUL DIETS ARE ONE OF THE GREATEST THREATS FACING OUR SPECIES"

*% strongly agreeing/somewhat agreeing

73%

90%

"FAST FOOD HAS KILLED LOCAL FOOD AND CULTURE"

*% strongly agreeing/somewhat agreeing

58%

82%

"I WORRY THAT OUR FOOD SUPPLY IS BECOMING INCREASINGLY CONTAMINATED/UNSAFE"

*% strongly agreeing/somewhat agreeing

MEN 92%
WOMEN 72%

75%

**"I AM MUCH MORE AWARE OF THE NUTRITIONAL/
HEALTH VALUE OF THE FOOD I EAT THAN I USED TO BE"**

*% strongly agreeing/somewhat agreeing

90% | **73%**

"EATING CAN BE AS PLEASURABLE AS SEX"

"GIVEN THE CHOICE BETWEEN SEX AND AN EXCELLENT DINNER AT A RESTAURANT, I WOULD CHOOSE THE DINNER"

60%

51%

46%

36%

SO FAR WE CONDUCTED THE RESEARCH FOR THESE TOPICS

FOOD

MONEY

TECHNOLOGY
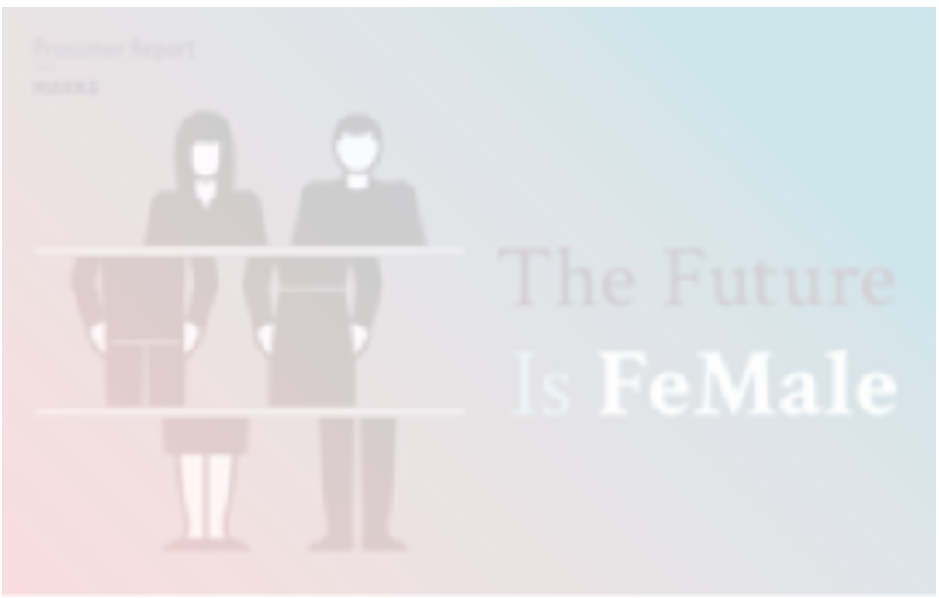
GENDER

HOW WORRIED YOU ARE ABOUT EACH OF THE FOLLOWING ?

WORLDWIDE

MYANMAR

Worldwide				Statement
39%	29%	21%	11%	Running out of money as I grow older
33%	26%	21%	20%	Not being able to leave a financial inheritance to my children
32%	26%	20%	22%	My country going bankrupt
31%	37%	23%	9%	A global economic recession
33%	26%	20%	21%	Loosing money I've invested
27%	35%	26%	12%	The collapse of global financial markets
33%	26%	21%	20%	Not being able to pay my immediate bills
16%	23%	27%	34%	Not having as much money as my friends and relatives do
26%	23%	20%	31%	The company I work for going out of business
25%	32%	24%	19%	A violent conflict between rich and poor
20%	22%	20%	38%	My parents requiring my financial support
26%	28%	24%	22%	My adult children requiring my financial support

0   25   50   75   100

HOW WORRIED YOU ARE ABOUT EACH OF THE FOLLOWING ?

WORLDWIDE

Statement	Very worried	Somewhat worried	Slightly worried	Not at all worried
Running out of money as I grow older	39%	29%	21%	11%
Not being able to leave a financial inheritance to my children	33%	26%	21%	20%
My country going bankrupt	32%	26%	20%	22%
A global economic recession	31%	37%	23%	9%
Loosing money I've invested	33%	26%	20%	21%
The collapse of global financial markets	27%	35%	26%	12%
Not being able to pay my immediate bills	33%	26%	21%	20%
Not having as much money as my friends and relatives do	16%	23%	27%	34%
The company I work for going out of business	26%	23%	20%	31%
A violent conflict between rich and poor	25%	32%	24%	19%
My parents requiring my financial support	20%	22%	20%	38%
My adult children requiring my financial support	26%	28%	24%	22%

MYANMAR

Statement	Very worried	Somewhat worried	Slightly worried	Not at all worried
Running out of money as I grow older	83%	6%	3%	8%
Not being able to leave a financial inheritance to my children	82%	5%	3%	10%
My country going bankrupt	80%	10%	4%	6%
A global economic recession	79%	11%	5%	5%
Loosing money I've invested	78%	6%	4%	12%
The collapse of global financial markets	73%	14%	8%	5%
Not being able to pay my immediate bills	71%	14%	5%	10%
Not having as much money as my friends and relatives do	71%	12%	6%	11%
The company I work for going out of business	70%	9%	6%	15%
A violent conflict between rich and poor	69%	14%	8%	9%
My parents requiring my financial support	47%	17%	5%	31%
My adult children requiring my financial support	45%	18%	8%	29%

Legend: ■ Very worried ■ Somewhat worried ■ Slightly worried ■ Not at all worried

WHICH COMES CLOSEST TO YOUR POINT OF VIEW ?

On the whole, children born today will have **MORE** financial security than their parents had

OVERALL : **59%**

MILLENNIALS : 54%

OVERALL : 28%

MILLENNIALS : 29%

On the whole, children born today will have **LESS** financial security than their parents had

OVERALL : **24%**

MILLENNIALS : 18%

OVERALL : 53%

MILLENNIALS : 51%

On the whole, children born today will have the **SAME** level of financial security as their parents had

OVERALL : **17%**

MILLENNIALS : 28%

OVERALL : 19%

MILLENNIALS : 20%

MONEY GIVES MEANING TO MY LIFE

% Strongly agree / agree

OVERALL : **72%**

MILLENNIALS : 70%

OVERALL : 41%

MILLENNIALS : 44%

MONEY IS ESSENTIAL TO STAND OUT FROM THE CROWD

% Strongly agree / agree

OVERALL : 78%

MILLENNIALS : 76%

OVERALL : 38%

MILLENNIALS : 38%

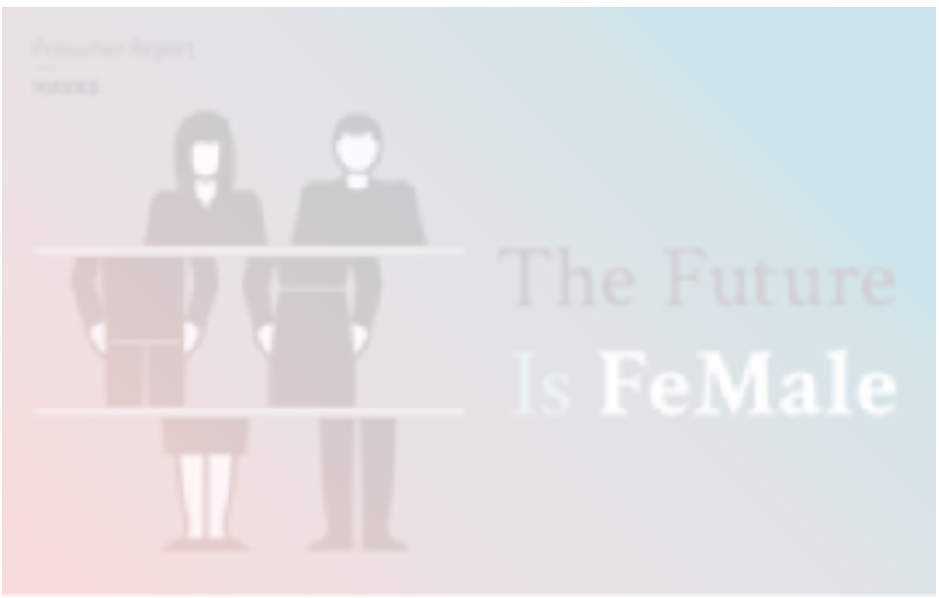# SO FAR WE CONDUCTED THE RESEARCH FOR THESE TOPICS

FOOD

MONEY

TECHNOLOGY

GENDER

I WOULD LIKE MY SMARTPHONE TO BE INTEGRATED INTO MY ANATOMY (E.G., IMPLANTED IN MY BRAIN OR SKIN)
% OF AGREEING STRONGLY/SOMEWHAT

22%
OVERALL

23%
MILLENNIALS

12%
OVERALL

17%
MILLENNIALS

I WOULD LIKE MY SMARTPHONE TO BE INTEGRATED INTO MY ANATOMY (E.G., IMPLANTED IN MY BRAIN OR SKIN)
% OF AGREEING STRONGLY/SOMEWHAT

22%
OVERALL

23%
MILLENNIALS

12%
OVERALL

17%
MILLENNIALS

27%
USA

30%
CHINA

15%
JAPAN

34%
INDIA

I AM A SLAVE TO MY SMARTPHONE

% OF AGREEING STRONGLY/SOMEWHAT

23%
OVERALL

23%
MILLENNIALS

20%
OVERALL

27%
MILLENNIALS

I AM A SLAVE TO MY SMARTPHONE
% OF AGREEING STRONGLY/SOMEWHAT

23%
OVERALL

23%
MILLENNIALS

20%
OVERALL

27%
MILLENNIALS

27%
USA

30%
CHINA

15%
JAPAN

25%
SINGAPORE

SEEING OTHER PEOPLE'S LIVES ON
SOCIAL MEDIA MAKES ME DEPRESSED/
UNHAPPY ABOUT MY OWN LIFE
% OF AGREEING STRONGLY/SOMEWHAT

24%
OVERALL

25%
MILLENNIALS

20%
OVERALL

28%
MILLENNIALS

I PREFER MY LIFE ON SOCIAL MEDIA TO MY ACTUAL LIFE
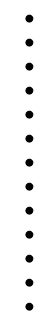*% OF AGREEING STRONGLY/SOMEWHAT*

24%
OVERALL

26%
MILLENNIALS

18%
OVERALL

19%
MILLENNIALS

I PREFER MY LIFE ON SOCIAL MEDIA TO MY ACTUAL LIFE
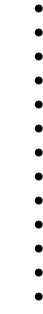*% OF AGREEING STRONGLY/SOMEWHAT*

24%
OVERALL

26%
MILLENNIALS

18%
OVERALL

19%
MILLENNIALS

I PREFER THE PERSON I AM ON SOCIAL MEDIA TO THE "REAL" ME
% OF AGREEING STRONGLY/SOMEWHAT

25%
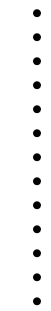OVERALL

24%
MILLENNIALS

16%
OVERALL

21%
MILLENNIALS

I DO NOT CARE WHAT COMPANIES
ARE DOING WITH MY DATA AS
LONG AS I GET FREE SERVICES/
PRODUCTS IN RETURN
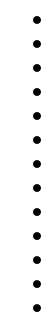*% OF AGREEING STRONGLY/SOMEWHAT*

30%

OVERALL

29%

MILLENNIALS

16%

OVERALL

20%

MILLENNIALS

ARTIFICIAL INTELLIGENCE WILL BE GOOD FOR SOCIETY

% OF AGREEING STRONGLY/SOMEWHAT

13%
MALE

12%
FEMALE

60%
MALE

44%
FEMALE

IN THE FUTURE, ARTIFICIAL INTELLIGENCE WILL... (CHOOSE ALL THAT APPLY.)

	MYANMAR	WORLDWIDE
Take over and control human society	43%	24%
Liberate us from repetitive tasks and give us more time to enjoy life	42%	41%
Solve our most pressing problems	35%	26%
Take away jobs and leave millions of people unemployed	30%	41%
Create new jobs that we cannot even imagine today	24%	31%
Destroy our planet	18%	15%
Help humanity progress	16%	39%
None of these	12%	7%
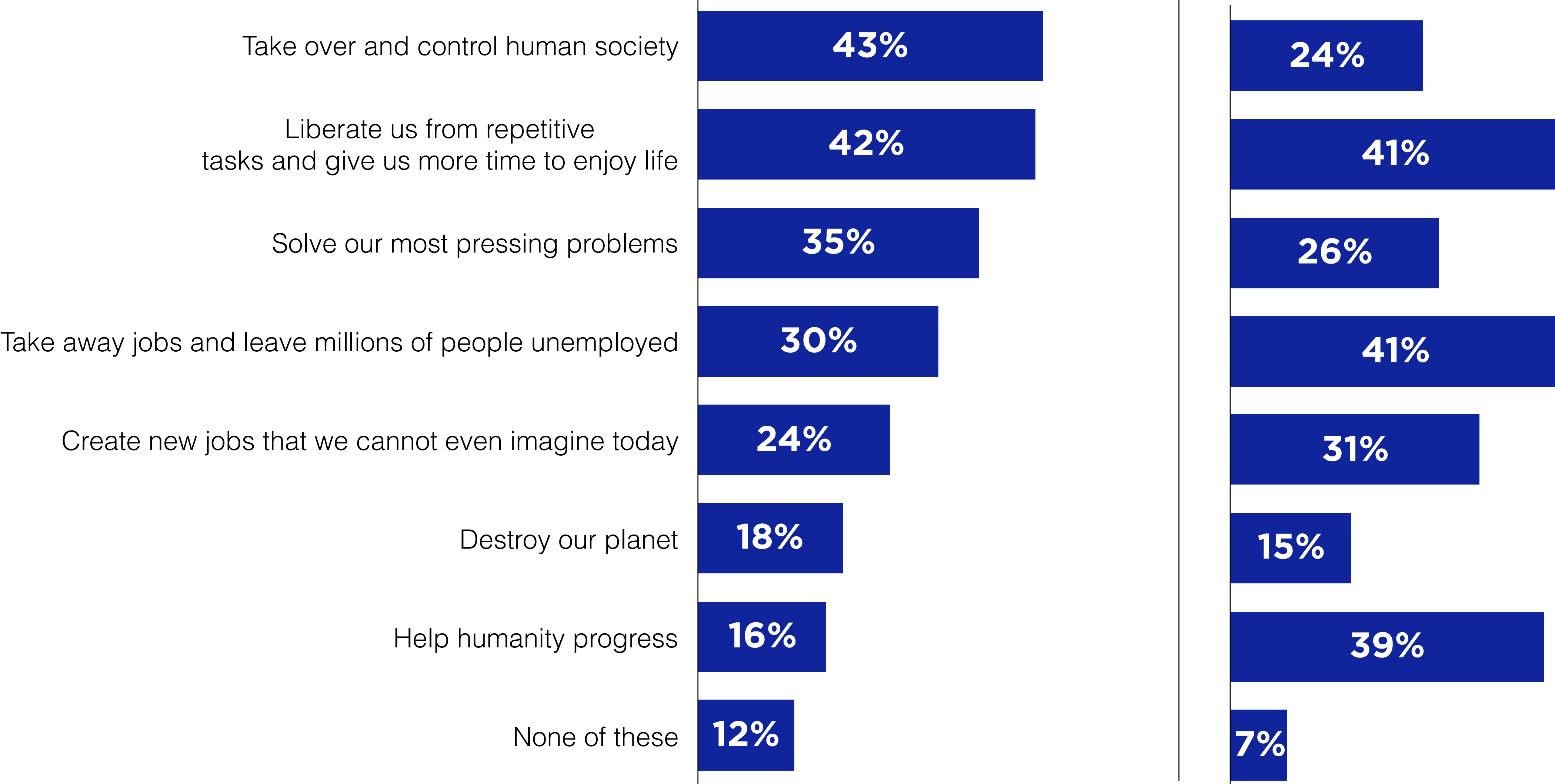
IN THE FUTURE, IT WILL BE NORMAL FOR HUMANS AND ROBOTS TO DEVELOP DEEP FRIENDSHIPS AND EVEN ROMANTIC RELATIONSHIPS
% OF AGREEING STRONGLY/SOMEWHAT

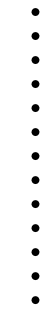## 24% OVERALL 24% MILLENNIALS

18% OVERALL 25% MILLENNIALS

ROBOTS WILL SOMEDAY BE SO LIFELIKE THAT WE WON'T BE ABLE TO DISTINGUISH THEM FROM HUMANS
% OF AGREEING STRONGLY/SOMEWHAT
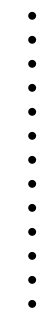
25% OVERALL 23% MILLENNIALS

36% OVERALL 41% MILLENNIALS

I BELIEVE I COULD HAVE A
ROMANTIC RELATIONSHIP
WITH A ROBOT
% OF AGREEING STRONGLY/SOMEWHAT

18%
OVERALL

21%
MILLENNIALS

9%
OVERALL

12%
MILLENNIALS

I BELIEVE I COULD HAVE A ROMANTIC RELATIONSHIP WITH A ROBOT

Country	Percentage
China	23%
India	19%
Myanmar	18%
USA	16%
Japan	13%
Cambodia	10%
Australia	10%
UK	8%
France	8%
Italy	7%
Poland	5%
Portugal	4%
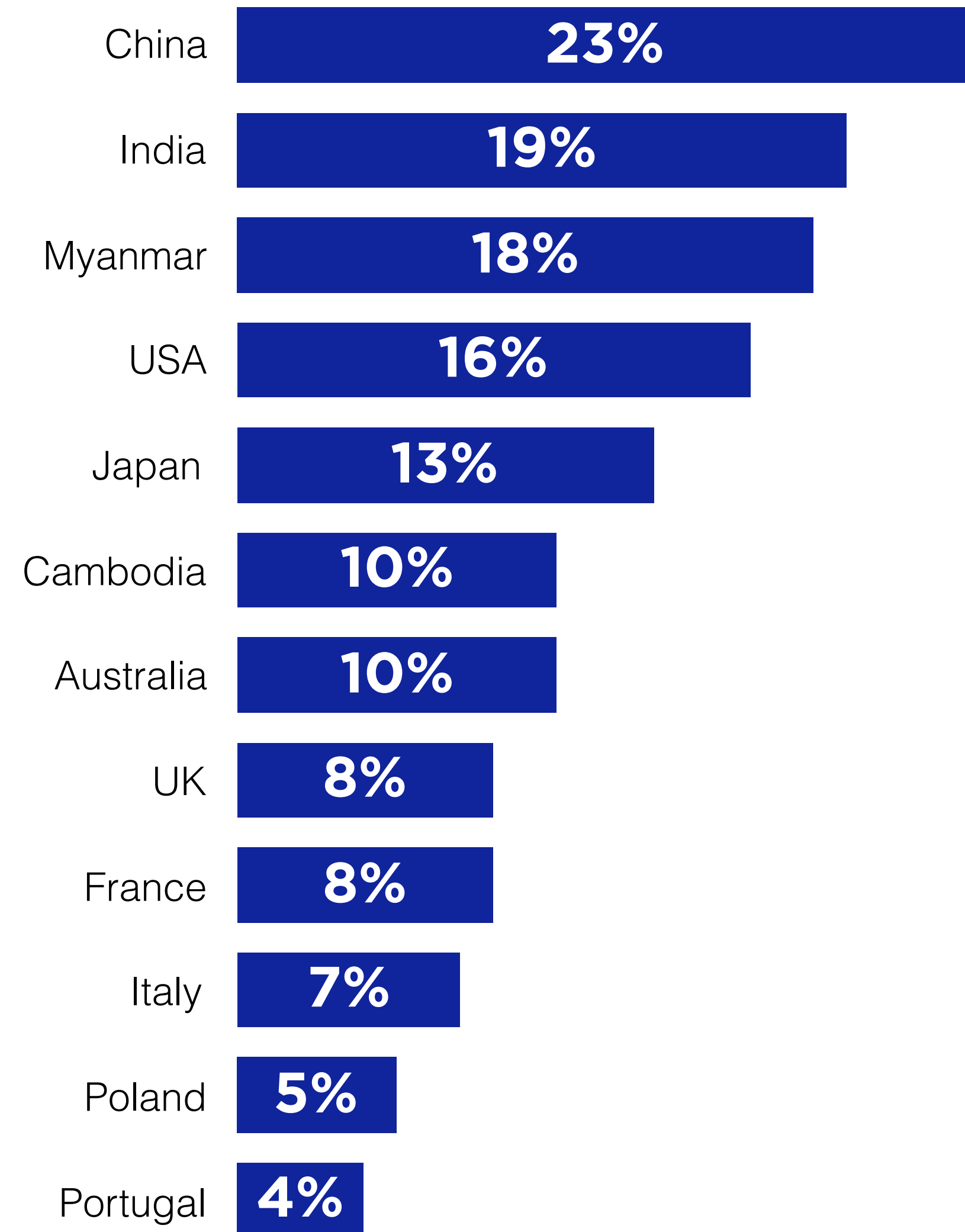
SO FAR WE CONDUCTED THE RESEARCH FOR THESE TOPICS

FOOD

MONEY

TECHNOLOGY
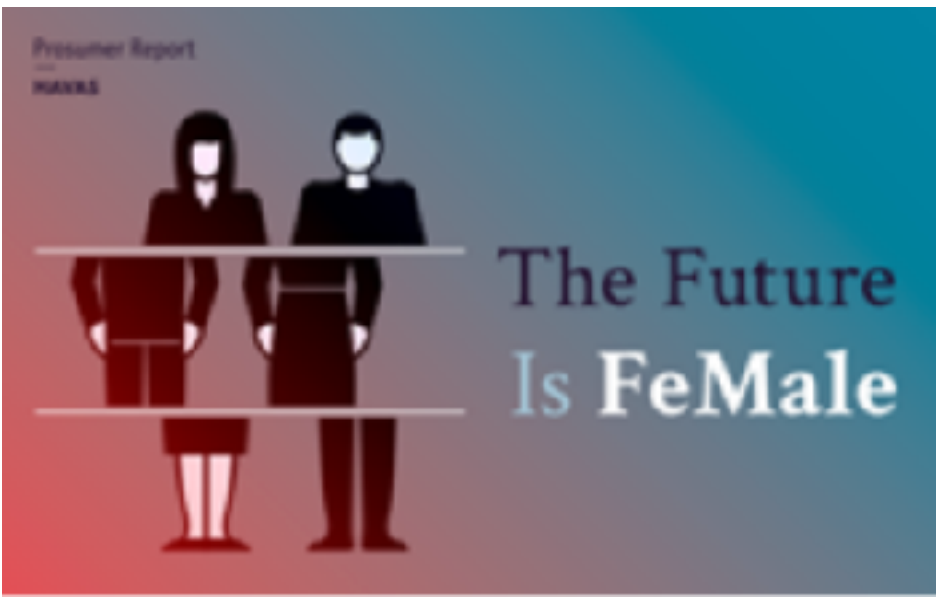
GENDER

"IN THE FUTURE, IT WILL BE WOMEN WHO WILL LEAD CHANGE IN THE WORLD"
SOMEWHAT/STRONGLY AGREEING

30%

45%

20%
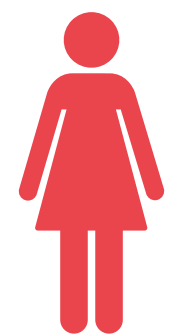
24%

"WOMEN AND MEN WHO WORK IN THE SAME POSITIONS SHOULD BE PAID THE SAME"
SOMEWHAT/STRONGLY AGREEING
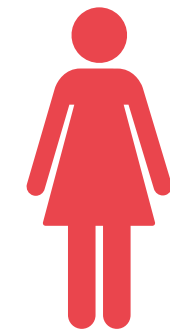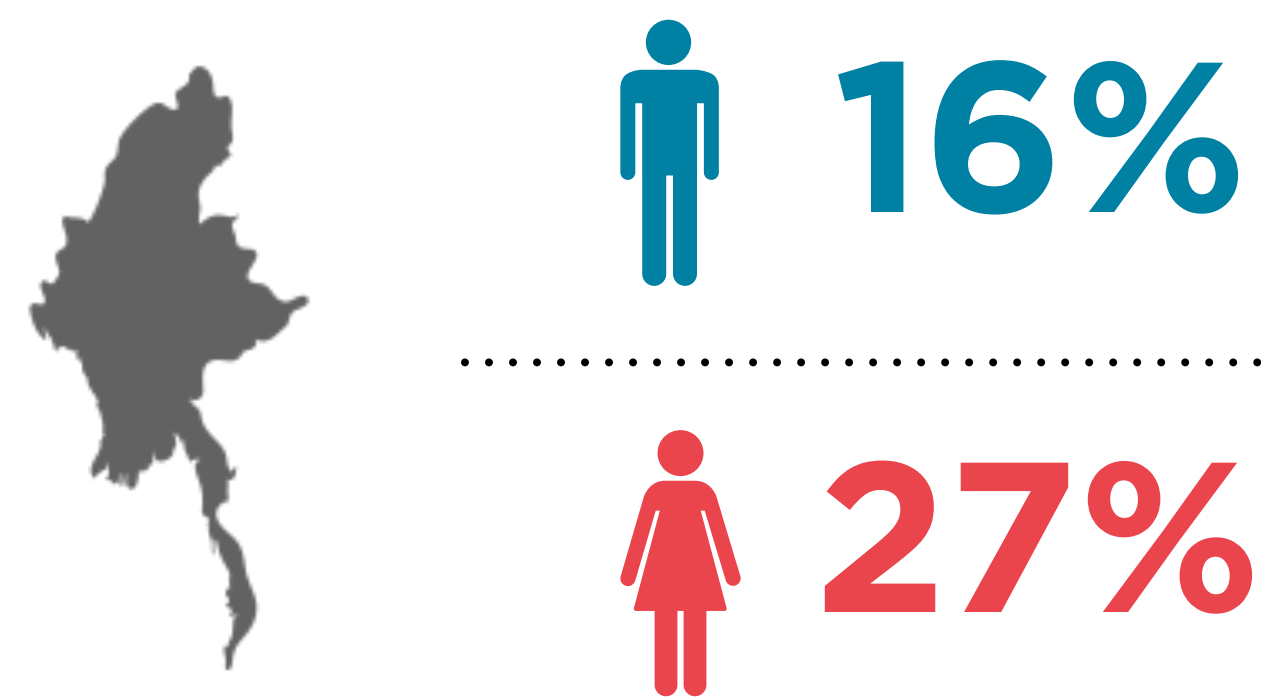
84%

91%

33%

38%
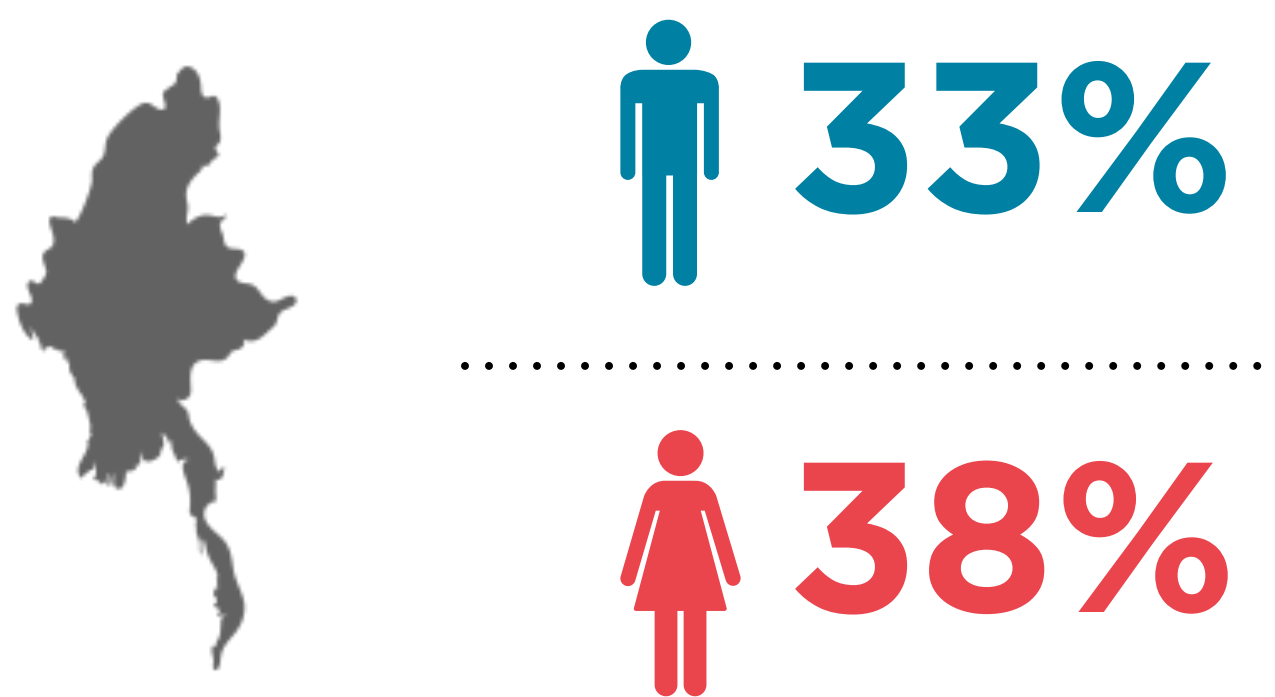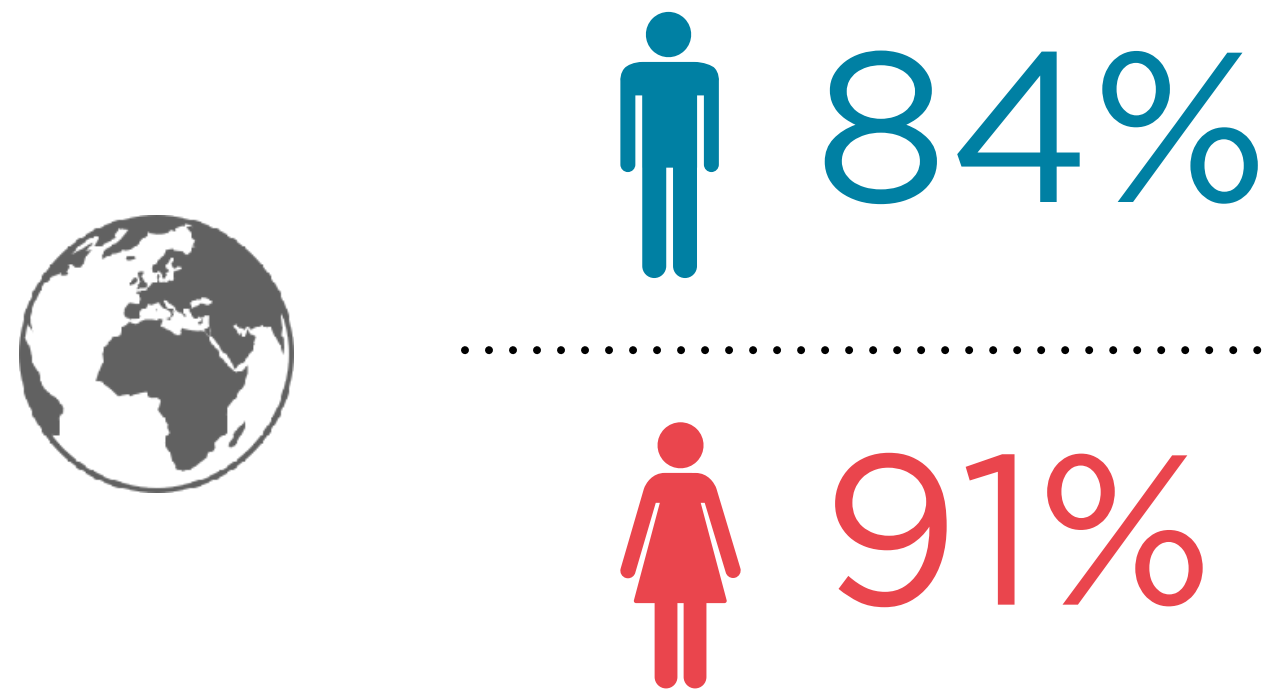
"I'M A FEMINIST"
SOMEWHAT/STRONGLY AGREEING

17%

31%

16%

27%
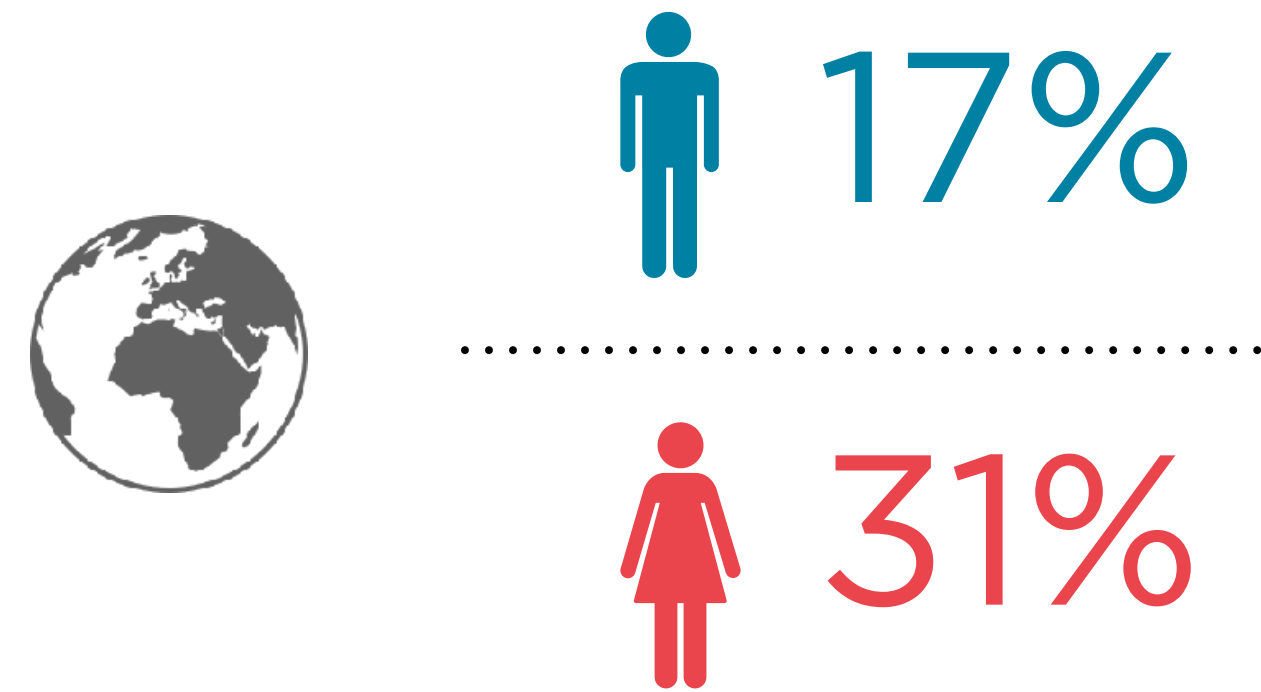
"FEMINISM HAS DONE MORE HARM THAN GOOD"
SOMEWHAT/STRONGLY AGREEING

33%

23%

28%

28%
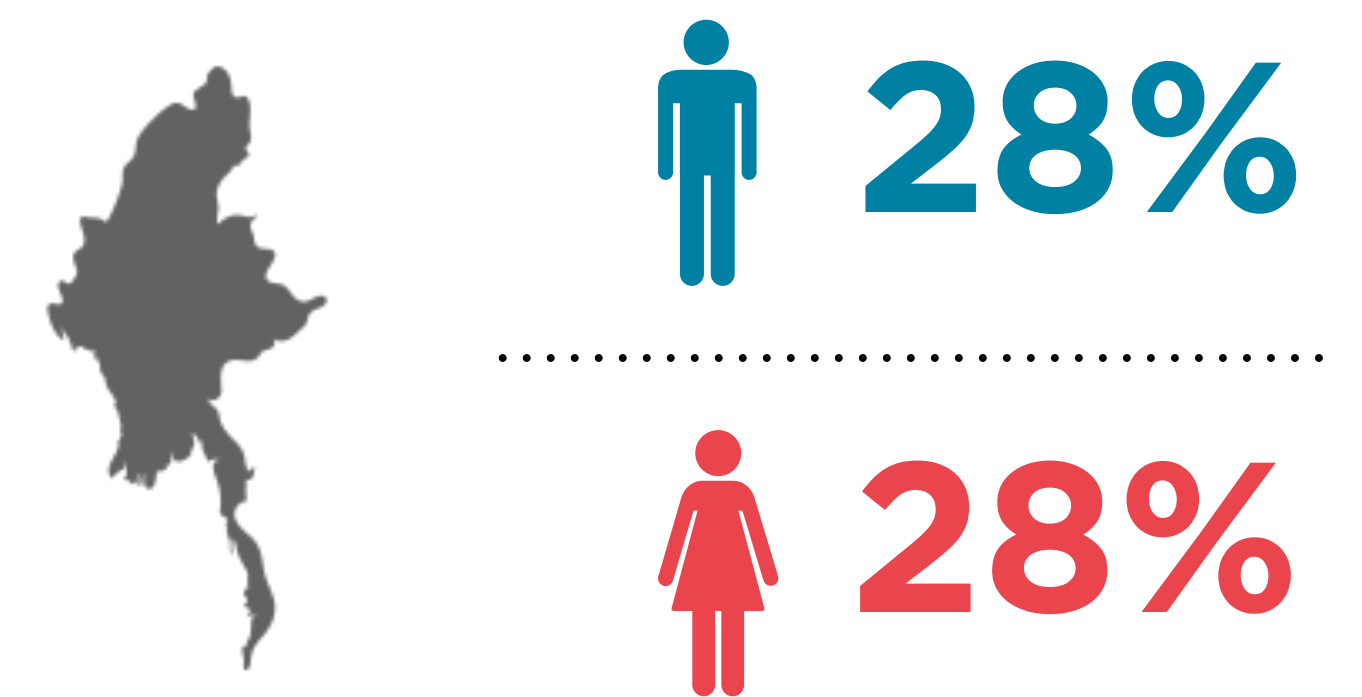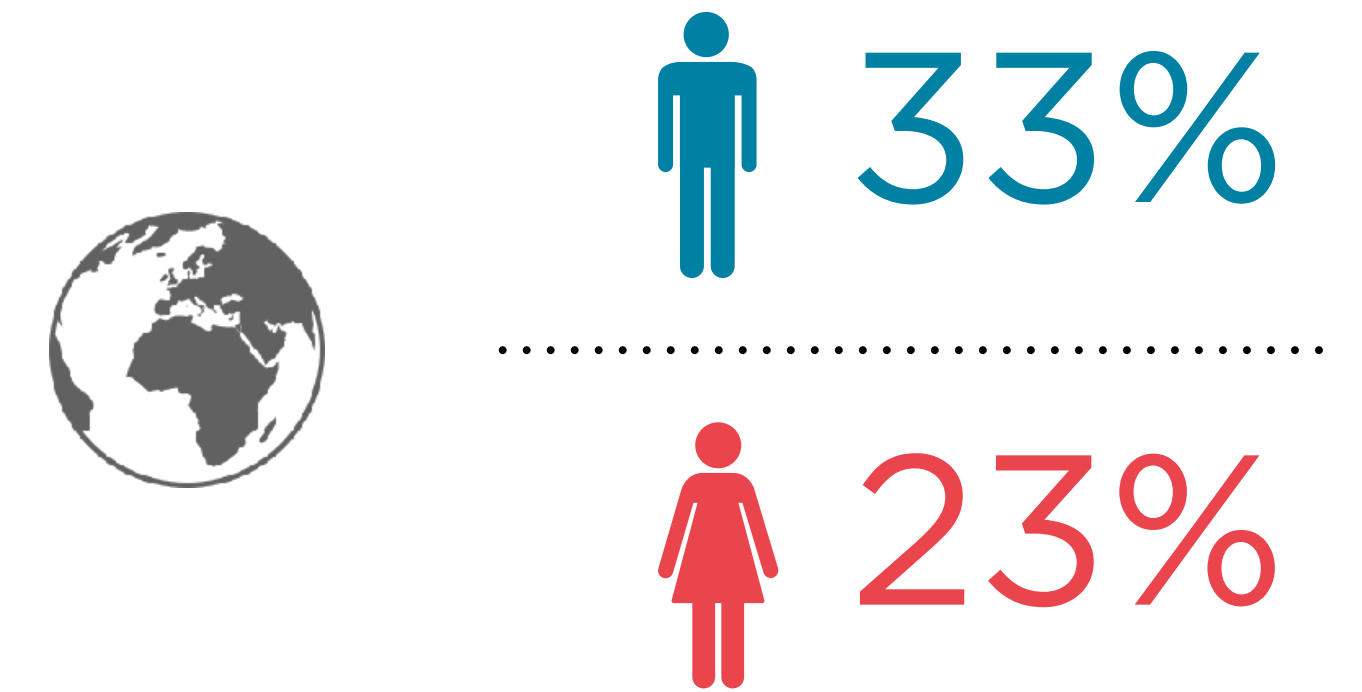
WORLDWIDE

IN GENERAL WHO ARE : (CHOOSE ONE ON EACH ROW)

	WOMEN	NO DIFFERENCES	MEN
Better bargain hunters	55%	35%	10%
Better money managers	37%	47%	16%
Better negociators	25%	50%	25%
More honest	27%	60%	13%
More trust worthy	25%	63%	12%
More sensible	35%	48%	17%
More sensitive	68%	27%	5%
More nurturing	61%	33%	6%
Kinder	43%	49%	8%
Smarter	18%	70%	12%
More valuable to society	15%	75%	10%
More reponsible	35%	51%	14%
More confident	16%	52%	32%
Better bosses/managers	13%	60%	27%

	WOMEN	NO DIFFERENCES	MEN
More independent	20%	48%	32%
Harder working	23%	61%	16%
More intellectual	18%	66%	16%
More mechanical	5%	30%	65%
Better leaders	11%	59%	30%
Funnier	13%	61%	26%
More creative/innovative	25%	57%	18%
Emmotionally stronger	41%	33%	26%
More adventurous	9%	44%	47%
More tech savy	6%	41%	53%
Braver	14%	47%	39%

WOMEN   NO DIFFERENCES   MEN

MYANMAR

IN GENERAL WHO ARE : (CHOOSE ONE ON EACH ROW)

	WOMEN	NO DIFFERENCES	MEN
More sensitive	69%	10%	21%
Better bargain hunters	68%	10%	22%
Kinder	61%	12%	27%
More nurturing	51%	14%	35%
More trust worthy	47%	21%	32%
More honest	47%	20%	33%
Better negociators	42%	20%	38%
More confident	43%	17%	40%
More reponsible	41%	18%	41%
Better bosses/managers	40%	25%	35%
Better money managers	39%	25%	36%
Smarter	36%	19%	45%
More sensible	36%	22%	42%
More valuable to society	35%	23%	42%

	WOMEN	NO DIFFERENCES	MEN
Harder working	45%	20%	35%
Funnier	43%	13%	44%
Emmotionally stronger	39%	17%	44%
More independent	37%	20%	43%
More intellectual	36%	17%	47%
More tech savy	33%	11%	56%
More mechanical	33%	17%	50%
Better leaders	32%	24%	44%
More adventurous	32%	19%	49%
Braver	30%	15%	55%
More creative/innovative	30%	18%	52%

WOMEN   NO DIFFERENCES   MEN

"THE WORLD WOULD BE A BETTER PLACE IF MORE WOMEN WERE IN POSITIONS OF POWER"

SOMEWHAT/STRONGLY AGREEING

34%

46%

25%

25%

OF THIS FOLLOWING, WHICH DO YOU THINK WOULD BE MOST LIKELY TO CAUSE A MARRIED COUPLE TO GET DIVORCED (PLEASE CHOOSE THE THREE MOST LIKELY CAUSES)

WORLDWIDE

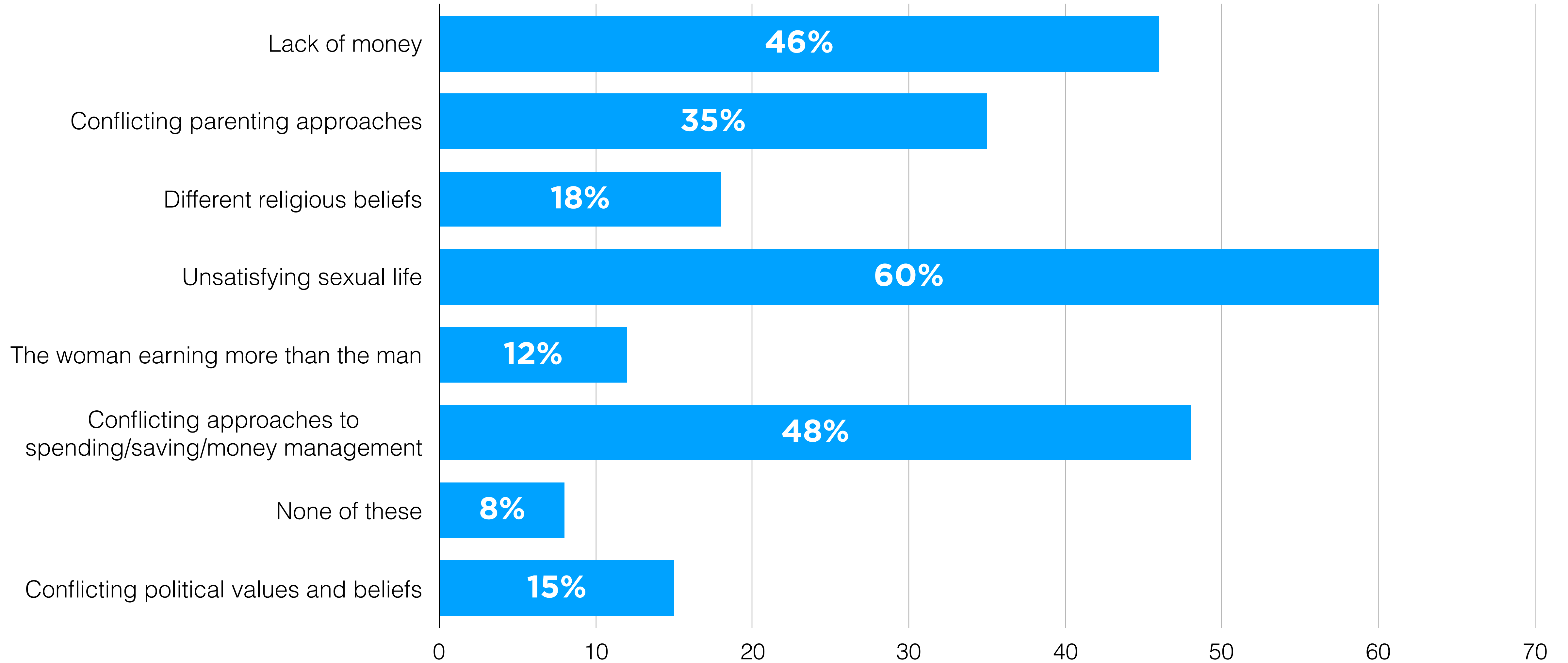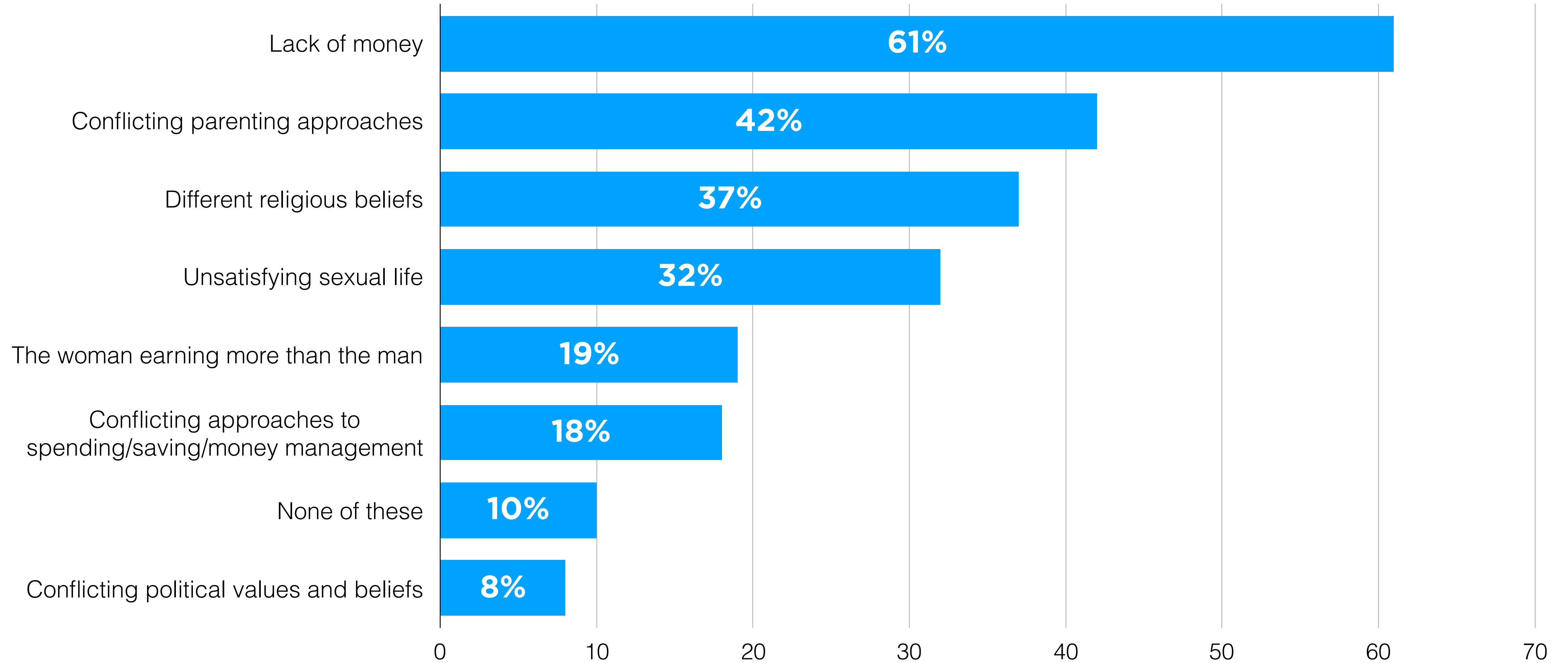| Category	Percentage
Lack of money	46%
Conflicting parenting approaches	35%
Different religious beliefs	18%
Unsatisfying sexual life	60%
The woman earning more than the man	12%
Conflicting approaches to spending/saving/money management	48%
None of these	8%
Conflicting political values and beliefs	15%

OF THIS FOLLOWING, WHICH DO YOU THINK WOULD BE MOST LIKELY TO CAUSE A MARRIED COUPLE TO GET DIVORCED (PLEASE CHOOSE THE THREE MOST LIKELY CAUSES)

MYANMAR

Cause	Percentage
Lack of money	61%
Conflicting parenting approaches	42%
Different religious beliefs	37%
Unsatisfying sexual life	32%
The woman earning more than the man	19%
Conflicting approaches to spending/saving/money management	18%
None of these	10%
Conflicting political values and beliefs	8%

THANK YOU