HAVAS RIVERORCHID FOR ICT4 DEVELOPMENT WORKSHOP

2018

YANGON / **MYANMAR**

havas riverorchid

WHAT WE WILL COVER TODAY

ABOUT HAVAS RIVERORCHID

ILIFE PROSUMER REPORT

DIGITAL LANDSCAPE MYANMAR

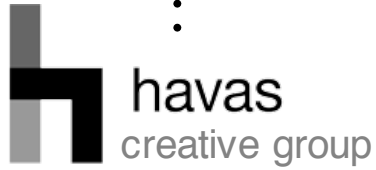QUESTION & ANSWERS

ABOUT US

havas

86 countries

335 offices

135 cities

19,350 people

havas

havas creative group

havas media group

havas worldwide

media tools
and expertise

havas riverorchid

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.
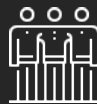
LOVING
KNOWING
LIVING
INDOCHINA

WHAT
WE
DO

Our Core Capabilities

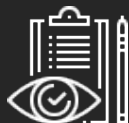|			
BRAND STRATEGY	ADVERTISING	SOCIAL MARKETING	ACTIVATION & EVENT
PLANNING & BUYING	CREATIVE & DESIGN	CONTENT DEVELOPMENT	MOBILE MARKETING
SOCIAL MEDIA & SOCIAL LISTENING	RESEARCH & BRAND HEALTH TRACKING	INFLUENCER MARKETING	DIRECT MARKETING

ILIFE

PROSUMER REPORT - 2018

havas
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GLOSSARY

BABY BOOMERS: People born between the end of World War 2 (1945) and the late 1960s, period during which the populations and economies of certain nations (particularly the US) boomed. This term was coined in 1974 when the advertisers recognized the spending power and very different demands of these (then) youngsters.

FAKER: A person who create false content/media in such a way that it appears to be genuine, in order to cheat a group or cluster of digital users

FOMO: Anxiety that an exciting or interesting event may currently be happening elsewhere, often aroused by posts seen on social media.

GENERATION X: A label attributed to people born during the 1960s and 1970s. Members of Generation X are often described as cynical or disaffected, though this reputation obviously does not apply to all people born during this era. This generation has an increased understanding of technology, having grown up during the age of computers. Sometimes also shortened to Gen X.

MILLENIALS: The generation that follows Generation X, with birth years ranging from the early 1980s to the early 1990s. Many parents of this generation were "Baby Boomers," thus making it the largest generation since the boomers. This generation is more likely to lean liberal in their political ideology, less likely to practice religion than previous generations, and grew up in the age of technology and therefore are very versed in technology. Also known as Generation Y.

GEN Z: Members of the generation of people born since the mid-1990s who are seen as confident users of new technology. These are the youngest generation. In many ways, they reflects and amplifies the Millennials generation that came before it. It's the most diverse and inclusive generation yet.

TROLL: Someone who leaves an intentionally annoying message on the internet, in order to get attention or cause trouble

ABOUT THE STUDY

In 2017, Havas partnered with Market Probe International to survey 12,168 men and women ages 18+ in 32 markets:

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
41%
AGE 18-34

GEN X
36%
AGE 35-54

BOOMERS
23%
AGE 55+

ABOUT THE STUDY

SAMPLE IN MYANMAR

METHODOLOGY: Face-to-face, house-to-house interviews via CAPI (tablets). Random sampling (using right hand rule, pre-assigned starting points, household intervals, kish grid) of individuals 18 years old and above. Aside from Gender and province, no other quota applied. Natural fall-out based on random sampling is applied.

GEOGRAPHIC AREAS: Yangon = 150; Mandalay = 150

KEY TARGET INSIGHTS: Majority of respondents were aged 19-26 (47%); married or living with partner (52%), with some tertiary education (42%), with household icome of 350,001 kyats -500,000 kyats (26%), employed full time (65%)

ABOUT THE STUDY

21% OF LEADING-EDGE
PROSUMER

79% OF
MAINSTREAM PEOPLE

WHO ARE THE PROSUMERS ?

Prosumers are today's leading influencers and market drivers—and they've been a focus of Havas Worldwide studies for more than a decade. Beyond their own economic impact, Prosumers are important because they influence the brand choices and consumption behavior of others. What Prosumers are doing today, mainstream consumers will likely be doing 6 to 18 months from now.

*IN MYANMAR WE DIDN'T IDENTIFY THE PROSUMERS. ALL PROSUMERS MENTIONED IN THIS REPORT REFER TO GLOBAL PROSUMERS

ABOUT THE STUDY

The global study from Havas highlights several trends in the relationship that people have with new technology and new media.

The purpose of this report is to :
1 - Explain and analyse those global trends
2 - Figure out if Myanmar follows those trends or not
3 - Understand if there are specific trends to Myanmar

VS
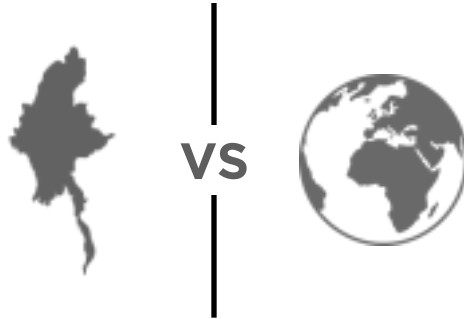
INTRODUCTION

With every passing year, technological advances are reaching more godlike dimensions—enabling humans to move about, communicate, and heal ourselves in previously unimaginable ways. As new technologies and applications arise, how will we cope with the effects of their power? What price will we pay for cheating death, creating life, and genetically altering living beings—including ourselves? As we spend more time alone and in virtual worlds, will what divides us grow more powerful than what uni es us? With this study, we seek to understand people's perceptions and expectations of various aspects of technology in order to gain a clearer glimpse of what is to come.

5 TRUTHS ABOUT ILIFE

1

FOR 1 IN 5 MILLENNIALS WORLDWIDE AND IN MYANMAR, VIRTUAL TRUMPS REALITY.

Most of us live in two worlds now—our "real" lives on planet Earth and the virtual lives we have created online—and increasingly those worlds are colliding: More than a quarter of millennials report feeling depressed or unhappy about their own lives in comparison with the idealised lives they see online **(one on five in Myanmar)**. And around 1 in 5 prefer who they are on social media to their actual selves **(one on five in Myanmar)**. At what point will the allure of the worlds and personas we have carefully crafted online become more valuable—and even more real—to us than our flesh- and-blood existences?

2

THE WALL BETWEEN OUR CONSUMER AND PRIVATE LIVES IS ERODING.

Our front doors have long been a physical and symbolic divide shielding our most intimate lives from view. This will change as consumers give brands virtual house keys, inviting them to stock their refrigerators and drop off other products when the homeowners are out. Drones and other new technologies will allow our properties and perhaps even our home interiors to be scanned in order to trigger brand offers (upgraded patio furniture, anyone?). Security and privacy have become a currency more people are willing to exchange for convenience and fun. **33% of Myanmar would like their refrigerator to automatically order products they run out of and have them delivered to my home VS 34% worldwide**

5 TRUTHS ABOUT ILIFE

3

HUMANS 2.0 WILL BE LAZIER AND DUMBER.

Human beings have long had a complicated relationship with artificial intelligence (AI). We dream of the convenience of robotic housekeepers even as we immerse ourselves in dystopian tales of robots run amok. Our study reveals that it is not robots we fear so much as our own baser selves. Will AI ultimately make humans lazier, less independent, and less capable of creative thought? **42% of Myanmar worry that when AI and robots are fully embedded in our lives, humans are going to be lazy and idle.**

4

DECIDED, WE FALL

Our online communities have become echo chambers in which we shield ourselves from news and ideas not in synch with our existing worldviews. This will only get worse as more people make social media their primary source of news, as a majority millennials already do. Nearly half our global respondents agree that social media is a fracturing force. Only **28% of Myanmar think Social media is reducing our ability to think critically.**

5 TRUTHS ABOUT ILIFE

5

OUR IMPENDING LOSS OF PRIVACY TERRFIES US.

Most of us love technology, and yet lurking beneath our excitement is a morass of fear and uncertainty related to data breaches and unlawful surveillance. How can brands deliver digital products and services that inspire not just enthusiasm but also confidence? **30% of Myanmar worry that they do not know what companies are doing with their data/information.**

Stating the Obvious:
We Are Moving Toward Total Connectivity

Just about all of our study respondents — 87% of consumers — own a smartphone. But ownership is far from evenly distributed, with rates ranging from a low of 36% in Cambodia to 70% in Japan and 98% or more in China, India, Saudi Arabia, Singapore, and Spain **(87% in Myanmar)**. **The following figures about smartphones usage have to be considered acknowledging that 6 years ago, almost no one had a smartphone or even a sim card in the country.**

For a growing number of us, smartphones have become our go-to digital tool. People now are more likely to search Google on their mobiles than on their desktops, and, according to Pew, a majority of US adults already are making purchases via their smartphones. With every new download, our phones can add a new utility— serving as a fitness coach, interior designer, museum docent, or myriad other things. It's little wonder, then, that 4 in 10 millennials already spend more time in apps than on websites **(a quarter of Myanmar millennials)** and that more than a quarter of millennials would rather lose their wallet than their phone **(1 one 5 in Myanmar)**.

What's next? Perhaps total body integration. Already we are seeing mobile technology embedded into our clothing and even implanted under our skin. For now, just 12% of people would like to see smartphone technology integrated into their anatomies, but those numbers increase to 23% of the total sample in the United States, to 32% in China, and to 35% in India. In the not-so-distant future, we may not have to worry about losing our wallet or phone, because the functionalities of both will be within us.

DO YOU HAVE A SMARTPHONE ?
% OF YES

SMARTPHONE OWNERS ONLY:

85%
OVERALL

87%
MILLENNIALS

87%
OVERALL

93%
MILLENNIALS

I SPEND MORE TIME IN APPS THAN I DO ON WEBSITES
% OF AGREEING STRONGLY/SOMEWHAT

26%
OVERALL

24%
MILLENNIALS

28%
OVERALL

42%
MILLENNIALS

I WOULD RATHER LOSE MY WALLET THAN MY PHONE
% OF AGREEING STRONGLY/SOMEWHAT

19%
OVERALL

21%
MILLENNIALS

19%
OVERALL

27%
MILLENNIALS

SMARTPHONE OWNERS ONLY:

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

REACHING THE LIMITS OF TOTAL CONNECTIVITY

LESS IS MORE

As much as we love our apps, we actually want fewer of them—or at least a more carefully curated collection. Apps take up precious space, and so half our sample claim they have what they need and don't wish to download more. Only the most appealing and useful new entries will prevail. WeChat is ahead of the game in its efforts to become a super-app in which other apps reside. This allows people to use one platform (and consequently one brand) to perform any activity without the need to download anything new.

SMARTPHONE OWNERS ONLY:

I HAVE ALL THE APPS I NEED ON MY SMARTPHONE AND DO NOT NEED TO DOWNLOAD MORE
% OF AGREEING STRONGLY/SOMEWHAT

35%
OVERALL

35%
MILLENNIALS

50%
OVERALL

50%
MILLENNIALS

THE RISING WORRY THAT TECHNOLOGY IS WEAKENING HUMAN BONDS

Technology is addictive. More than 6 in 10 survey respondents—and nearly three-quarters of Prosumers—say they always keep their phone within reach unless it is charging **(38% in Myanmar)**. Nearly half of Prosumers and millennials check their phones if they wake up in the middle of the night, and more than a quarter admit to being a "slave" to their smartphones. We just can't quit them.

On a larger scale, people are increasingly worried about the societal effects of mobile technology. In our 2009 study, 51% agreed with the statement, "I worry that digital communication is weakening human bonds." Eight years later, more than two-thirds of people worldwide agreed with a similar statement: "Modern technology is weakening human bonds." **In Myanmar, only 34% of people agree to this statement.** Looking at some of the markets included in both studies, we see a clear increase in concern. In the US, 54% agreed with the original statement in 2009 compared with 68% who agreed in 2017. We saw similar increases in other countries, as well, including Brazil (55% agreed in 2009 vs. 76% in 2017), the UK (48% vs. 63%), and China (55% vs. 64%). The concern is clear: As we become more and more plugged in to our digital devices, we may be sacrificing the ties that unite us as a species.

SMARTPHONE OWNERS ONLY:

OTHER THAN WHEN IT'S CHARGING, I ALWAYS KEEP MY SMARTPHONE WITHIN REACH
% OF AGREEING STRONGLY/SOMEWHAT

28% OVERALL : 30% MILLENNIALS

60% OVERALL : 65% MILLENNIALS

SMARTPHONE OWNERS ONLY:

**WHEN I WAKE IN THE MIDDLE OF THE NIGHT,
I USUALLY CHECK MY PHONE
% OF AGREEING STRONGLY/SOMEWHAT**

26%
OVERALL

29%
MILLENNIALS

35%
OVERALL

48%
MILLENNIALS

SMARTPHONE OWNERS ONLY:

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

23%
OVERALL

23%
MILLENNIALS

20%
OVERALL

27%
MILLENNIALS

**MODERN TECHNOLOGY IS WEAKENING HUMAN BONDS
% OF AGREEING STRONGLY/SOMEWHAT**

34%
OVERALL

36%
MILLENNIALS

67%
OVERALL

65%
MILLENNIALS

WHAT'S NEXT? STRIKING THE RIGHT BALANCE

Many of us are torn between our desire for convenience and our fear that its cost—in social disruption and in compromised privacy and security—ultimately will be too high to bear. One component of this is how much of our lives we are willing to place in the hands of a particular company. The bestseller The Circle envisions a world in which one superbrand dominates not only all other brands but all industries because of its efficiency and the convenience it offers. Are you willing to lay open your life to Amazon or another brand in exchange for a reliable source of products, grocery deliveries, home services, entertainment, and more? Many of us are. Even those who claim to hate Uber may find their resistance destroyed by the allure of hot food delivered from their favourite restaurant.

The imperative for brands will be to integrate themselves seamlessly into people's lives while also respecting customers' limitations— including the limitations some people may not be willing to admit. Consider the emerging eld of in-car apps. We saw in our "Modern Nomad" study that most Prosumers would like their cars to be connected to the internet, but we also have strong evidence that this will increase the potential for distraction-related injuries and fatalities. Nearly 6 in 10 of our survey respondents are sufficiently concerned about this prospect to agree that automakers should block apps when people are driving alone. **In other words, we have already reached the point at which most of us recognise that we need to be protected from some digital capabilities. Just because a brand can deliver a next-level order of convenience does not mean it should.**

32%
OVERALL

58%
OVERALL

Trolls,
Fakers,
and FOMO,
Oh My!

IT'S ALL IN HOW YOU USE IT

Social media companies have amassed some 2.8 billion active users as of the start of 2017—among them, 83% of the consumers in our study **(75% in Myanmar)**. When these sites first sprang up, they were places we would check in on once in a while. Now, for many of us, they have become our principal way to connect with—and perhaps even influence—the world. Ever since the so-called Arab Spring of 2011—when social media first was recognised as an essential tool for activists—we have seen it steadily grow as a "place" where people can connect and take unified action in support of personal, political, social, and environmental causes. **Today, more than 53% of our global sampling use social media in support of causes they care about, as do half of mainstream consumers.** This phenomenon is particularly pronounced in certain markets. In India, for instance, 85% of people say social media empowers them to support causes they care about **(Only 32% in Myanmar)**, compared with just 31% of Japanese who say the same.

SOCIAL MEDIA USERS ONLY:

DO YOU EVER USE SOCIAL MEDIA SITES ?
% OF YES

SOCIAL MEDIA EMPOWERS ME
TO SUPPORT CAUSES I CARE ABOUT
% OF AGREEING STRONGLY/SOMEWHAT

75%
OVERALL

84%
MILLENNIALS

24%
OVERALL

26%
MILLENNIALS

86%
OVERALL

91%
MILLENNIALS

53%
OVERALL

58%
MILLENNIALS

At present, the average user spends around two hours a day on social sites, with Facebook typically taking up 35 minutes of that time. Nearly half the consumers we surveyed consider social media a big time waster. Looking at the individual markets, Germans (82%) and Russians (78%) are the most apt to consider social media a waste of time, while people in the Philippines (20%) and Japan (23%) are the least likely to feel that way. **In Myanmar, 32% of people think that Social media is a big time waster.**

SOCIAL MEDIA IS A BIG TIME WASTER
% OF AGREEING STRONGLY/SOMEWHAT

32%
OVERALL

28%
MILLENNIALS

45%
OVERALL

46%
MILLENNIALS

THE TIES THAT DIVIDE US: TWO DOWNSIDES

DOWNSIDE #1: HALF OUR GLOBAL SAMPLE BELIEVES SOCIAL MEDIA IS A DIVISIVE FORCE

For a majority of Prosumers and millennials, social media is now their main source of news. That's important for a couple of reasons. First, it likely means people are getting their news via headlines and fast-breaking, rather than in-depth, reports. Second, it means people are more likely to get their news from within a media bubble of their own making, thanks to relevance algorithms that keep feeding us more of what we have already chosen to consume. **More than a third of Prosumers and millennials are cognisant of that bias, admitting that social media tends to con rm their already established opinions rather than challenge them.** The significant difference in agreement levels between Prosumers (42%) and the mainstream (28%) on this question indicates that this is a view that will gain traction. **In Myanmar 32% of social media users say that it's their main source of news. 27% acknowledge that it confirms the opinion they have instead of challenging them.**

32%
OVERALL

34%
MILLENNIALS

40%
OVERALL

53%
MILLENNIALS

As the modern world grapples with the influence of social media, a consensus is forming that these platforms are serving to dissolve some of the societal "glue" that binds us. Nearly half our global sample (45%) believe social media is a divisive force **(29% in Myanmar)**. Anyone who has spent much time on these sites in the last year can certainly attest that the lines are clearly drawn, separating those who support Trump, Brexit, gun ownership, Catalonian independence, immigration, the fight against climate change, or whatever the issue might be from those who oppose these things. Increasingly, the two sides on each issue cannot even agree on what is a bona de fact, as people grapple to separate legitimate from "fake" news and human users from propaganda-spewing bots.

SOCIAL MEDIA USERS ONLY:

SOCIAL MEDIA CONFIRMS MY OWN OPINIONS RATHER THAN CHALLENGING THEM
% OF AGREEING STRONGLY/SOMEWHAT

27% OVERALL   31% MILLENNIALS

30% OVERALL   36% MILLENNIALS

IN THE PAST, SOCIAL MEDIA BROUGHT PEOPLE TOGETHER; TODAY, IT DIVIDES THEM
% OF AGREEING STRONGLY/SOMEWHAT

29% OVERALL   30% MILLENNIALS

44% OVERALL   48% MILLENNIALS

WHAT'S NEXT?
SITUATION CRITICAL

One issue we are likely to hear a good deal more about in coming years is the impact these media bubbles are having on our ability to objectively analyse information. **Nearly half our global sample (Nearly a third of Myanmar) think social media is reducing people's ability to think critically.** How will we defend against that? Social platforms are struggling in their efforts to combat fake news, which may mean it is up to schools to implement programs that help children distinguish what is real from what is not. It's possible we will see a migration toward Reddit, Quora, and other platforms where people can find opposing views, but it seems increasingly likely that the heyday of unbiased news reporting—and consumption—is behind us. And that is a dangerous problem indeed.

28%
OVERALL

25%
MILLENNIALS

46%
OVERALL

47%
MILLENNIALS

DOWNSIDE #2: IN THE WORDS OF TEDDY ROOSEVELT, "COMPARISON IS THE THIEF OF JOY"

We are all familiar with the psychological effects of our new social platforms, including depression and loneliness, and so we will only touch briefly on them here. Suffice it to say that most users choose to depict the rosy highlights of their lives on these sites—happy children, inviting vacation spots, highly photogenic meals—while minimising or leaving out altogether life's imperfections. This can make our own lives seem worse by comparison—a situation particularly prevalent among younger people. **Around 1 in 5 global respondents say that seeing other people's lives on social media makes them unhappy with their own lives.** This number increases to 28% of millennials overall and to 41% of millennials in the UK 39% in the US and **25% in Myanmar**. At the same time, 20% of millennials—and 41% of US millennials— actually prefer their social media lives to their real lives. Even more disturbing, around 1 in 5 millennials actually prefer the people they are on social media—meaning their personalities and ways of interacting—to their real selves. It's a whole lot easier to be a thoughtful sage or life of the party when one's conversations come with an "edit" button.

SOCIAL MEDIA USERS ONLY:

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

SOCIAL MEDIA USERS ONLY:

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

24%
OVERALL

26%
MILLENNIALS

18%
OVERALL

19%
MILLENNIALS

SOCIAL MEDIA USERS ONLY:

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

WHAT'S NEXT?
GEN Z MASTERS THE SOCIAL MEDIA GAME

Millennials are known as digital natives, but it is actually the next generation—Gen Z—that is doing the best job of customising social media use for their particular needs. They safeguard their privacy by using ephemeral platforms such as Snapchat that cause their stories to automatically disappear, and they are more apt to delete older photos and other content so as to keep their social personas up to date. **They also are perfecting the art of creating multiple personas online.** So, on Instagram, for instance, they may maintain two accounts: their "real" one (rinstagram), which displays what they want the world to see, and their "fake" one (finstagram), in which they post things for the eyes of a close set of friends only. (In truth, finstagrams tend to be more real than rinstagrams, but who are we to quibble?) In this way, they can decide who gets to see—and judge—which aspects of their personal narratives. We are also seeing Gen Z lead the way in terms of monetising social media and turning large fan bases into paying careers, as digital influencers and YouTube personalities such as Lauren Giraldo, Britney Vargas, Bretman Rock, and others have done.

Data Creep and the End of Privacy

DATA USED FOR MY CONVENIENCE: APPROVED...

How comfortable would you be with a Walmart employee entering your home while you're at work and stocking your refrigerator with groceries? Or an Amazon delivery person tucking your packages just inside your front door? Both services are already under way, albeit on a limited scale. Or how about if a company had enough data on you that it could anticipate products you likely would want and then ship them to your home before you even ordered them? Creepy? Cool? A little of both?

As would be expected, millennials are ahead of the curve when it comes to embracing such schemes. Nearly half of them worldwide **and 33% in Myanmar** would like their refrigerators to automatically order needed items, while one-third **(30% in Myanmar)** are looking forward to "anticipatory shipping"—receiving products companies think they will want even if they have not yet ordered them. China is well ahead of the pack in this regard, with 80% of Prosumers looking forward to automatic refrigerator refills, and 70% keen on the notion of packages arriving unprompted.

I WOULD LIKE MY REFRIGERATOR TO AUTOMATICALLY ORDER PRODUCTS I RUN OUT OF AND HAVE THEM DELIVERED TO MY HOME
% OF AGREEING STRONGLY/SOMEWHAT

33%
OVERALL

32%
MILLENNIALS

34%
OVERALL

44%
MILLENNIALS

I WOULD LIKE COMPANIES TO BE ABLE TO PREDICT WHAT I WILL NEED TO BUY AND SEND IT DIRECTLY TO MY HOME
% OF AGREEING STRONGLY/SOMEWHAT

30%
OVERALL

30%
MILLENNIALS

25%
OVERALL

33%
MILLENNIALS

...BUT STAY AWAY FROM MY PRIVATE LIFE

It is one thing to have voice-controlled devices in our homes keeping us up to date on news and ordering us a pizza, and quite another to have them recording our every word and delivering them back to the mother ship—which is what happened to at least one early user of the Google Home Mini. Google reportedly has fixed the problem, but privacy fears remain. A majority of people worry about how companies are intending to use the personal data they stockpile. The situation will grow even more fraught as the Internet of Things spreads. Already, around three-quarters of those surveyed worry about privacy and security concerns stemming from internet-connected devices in their homes. **Myanmar also worry about these data and privacy topics but in a much smaller extend than worldwide (30%).**

IT WORRIES ME THAT I DO NOT KNOW WHAT COMPANIES ARE DOING WITH MY DATA/ INFORMATION
% OF AGREEING STRONGLY/SOMEWHAT

29%
OVERALL

30%
MILLENNIALS

74%
OVERALL

72%
MILLENNIALS

I WORRY THAT INTERNET-CONNECTED DEVICES WILL BE HACKED AND CAUSE HARM TO INDIVIDUALS/COMMUNITIES
% OF AGREEING STRONGLY/SOMEWHAT

28%
OVERALL

29%
MILLENNIALS

74%
OVERALL

72%
MILLENNIALS

I WORRY THAT INTERNET-CONNECTED DEVICES WILL BE USED FOR UNLAWFUL SURVEILLANCE
% OF AGREEING STRONGLY/SOMEWHAT

31%
OVERALL

31%
MILLENNIALS

74%
OVERALL

72%
MILLENNIALS

That said, there is an upside to digital surveillance for some people. Nearly 7 in 10 parents surveyed would like to be able to geo-locate their children at any time through their phones. What's good for the kid isn't necessarily good for the parent, however: Less than a third of those surveyed would like their friends and families to be able to geo-locate them through their smartphones. There was a wide gap in agreement rates by country, with just 7% of Dutch and 9% of Germans willing to be trackable via their smartphones versus **25% of Myanmar**, 62% of Indians, 57% of Chinese, and 53% of Russians.

I WOULD LIKE TO BE ABLE TO GEO-LOCATE MY KIDS AT ANY TIME THROUGH THEIR PHONES
% OF AGREEING STRONGLY/SOMEWHAT

29%
OVERALL

33%
MILLENNIALS

68%
OVERALL

71%
MILLENNIALS

I WOULD LIKE FRIENDS AND FAMILY TO ALWAYS BE ABLE TO FIND OUT WHERE I AM AT ANY MOMENT (GEO-LOCATION) THROUGH MY PHONE
% OF AGREEING STRONGLY/SOMEWHAT

25%
OVERALL

27%
MILLENNIALS

28%
OVERALL

31%
MILLENNIALS

WHAT'S NEXT:
IS PRIVACY AN OUTDATED LUXURY?

We talk about privacy, we fret about privacy, but, for the most part, people are resigned to the notion that there is no longer any easy, affordable, or reliable way to keep their private data secure. **Consumers are finding themselves at the centre of a business model with which they don't feel completely at ease**. And most agree that we are headed toward a future in which there simply will be no way to keep our private data secure. Have we given up? Will we reach a point at which the privacy costs push us away from the technologies we have grown to depend on? Or are we holding out hope that some tech brand will swoop in and solve the problem? We will probably see a bit of all three.

IN THE FUTURE, NONE OF US WILL BE ABLE TO KEEP OUR PRIVATE DATA SECURE
% OF AGREEING STRONGLY/SOMEWHAT

25%
OVERALL

26%
MILLENNIALS

67%
OVERALL

66%
MILLENNIALS

IN THE FUTURE, MAINTAINING OUR PRIVACY/PRIVATE DATA WILL BE EXPENSIVE
% OF AGREEING STRONGLY/SOMEWHAT

30%
OVERALL

30%
MILLENNIALS

65%
OVERALL

66%
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: Our New Life Partner?

AI IS GOOD...EXCEPT WHEN IT'S NOT

In his bestseller Sapiens, Yuval Noah Harari took us through a short history of the evolution of humankind and how we have not only adapted but also mastered our physical environment. In its sequel, Homo Deus, Harari explores humanity's next chapter: a tech-driven future. He speaks of a time when humans exchange meaning for power. A time when we cede our authority to machines and, in so doing, endanger many of the things we hold most dear. That time may finally be approaching, as artificial intelligence (AI) migrates out of science fiction and pop culture and into our actual lives.

For now, most people still consider AI a thing of the future— something that will affect our children and grandchildren more than ourselves. But overall, we are optimistic about the changes it will bring. Nearly two-thirds of Prosumers and half the mainstream believe that artificial intelligence will be good for society. **In general, emerging markets are the biggest fans of the technology.** Despite the United States being a primary driver of AI development, barely half of US Prosumers (55%) and just 44% of the mainstream believe AI will end up benefitting society overall, compared with 95% of Prosumers and 86% of mainstream consumers in China.

EMERGING THEMES AND TENSIONS

To better understand people's hopes and fears regarding intelligent machines, we provided a list of possible scenarios and asked people which they believe will come true. This allowed us to identify multiple themes and tensions that will help us understand how to balance people's desires and anxieties over AI.

Our study uncovered a clear gender divide. Just 44% of females in our global sample are optimistic about the future of AI compared with 60% of males. This is in line with our 2015 study, which found that 25% of men versus only 16% of women would choose to be a cyborg if given the option. **In Myanmar this gender divide is not prevalent as both male and women are very worried about AI. Indeed, only 12% of people think AI is a good thing.**

13%
MALE

12%
FEMALE

60%
MALE

44%
FEMALE

LIBERATION MAY LEAD TO LAZINESS

Sizeable proportions of the sample believe that AI will liberate us from repetitive tasks and give us more time to enjoy life. While most of us would love to have a 2.3-day workweek, that added leisure time might come at a price: 57% **(42% in Myanmar) worry that humans are going to become lazy and idle once intelligent machines are fully embedded in our lives**. Nearly as many (55%) worry that we are going to lose our ability to solve problems on our own. And 44% think we are going to become less imaginative. These numbers don't differ all that much in tech-obsessed China, indicating that even the biggest supporters of AI are concerned about the potential for unintended—and unwelcome—consequences.

WHEN AI AND ROBOTS ARE FULLY EMBEDDED IN OUR LIVES, I WORRY THAT HUMANS ARE GOING TO...

MYANMAR

Become lazy and idle	42%
Lose our ability to solve problems on our own	26%
Lose our ability to accept imperfections in people	23%
Consider ourselves a "lesser" race than robots	23%
Lose our ability to accept contradictory opinions	23%
None of these	21%
Use robots to take control and enslave much of humanity	18%
Become less imaginative and creative because everything is logic based	16%
Use robots to wage war and ultimately destroy the planet	13%
Lose our ability to believe in a higher power/be spiritual	8%

WORLDWIDE

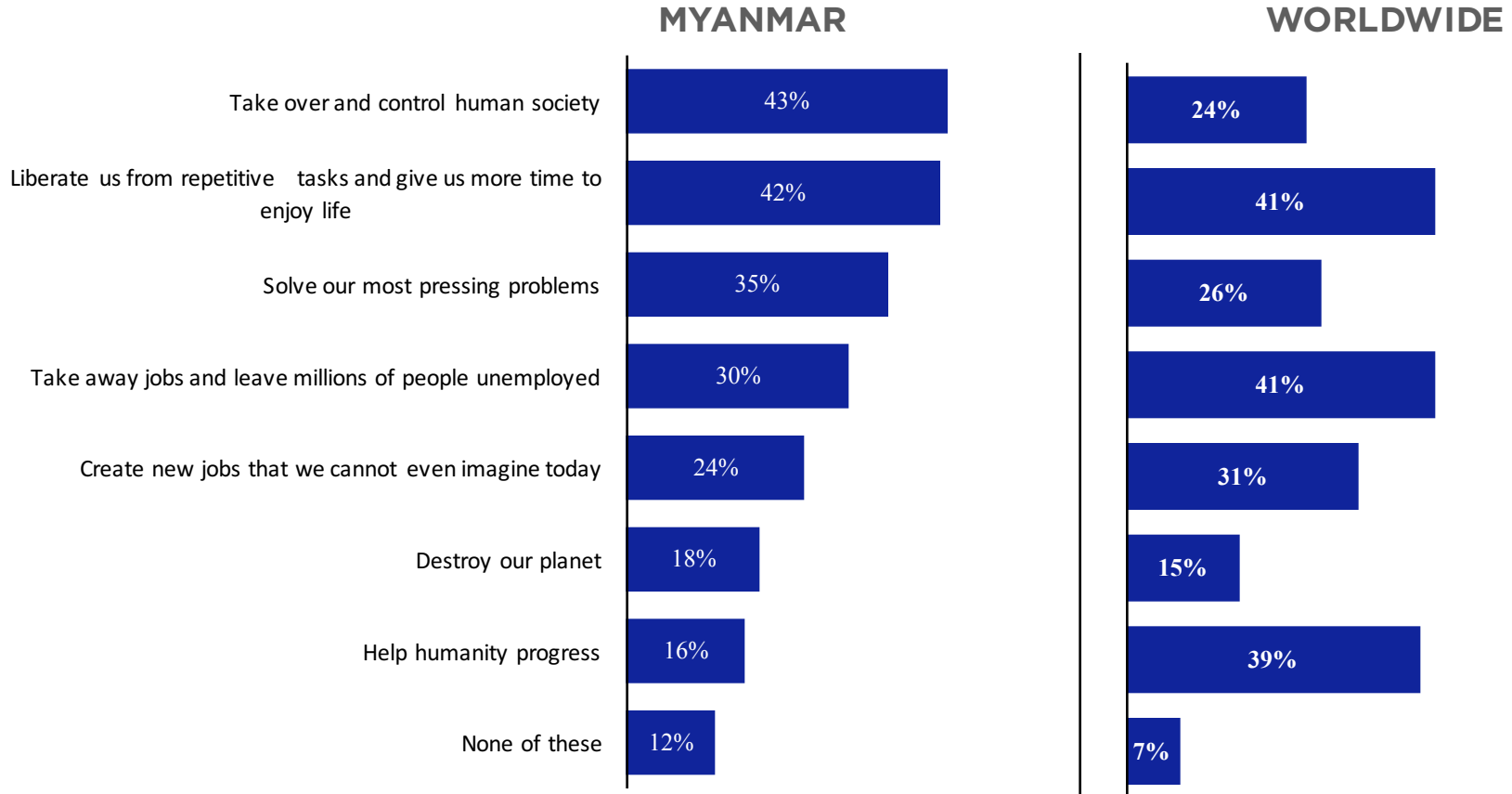|	
Become lazy and idle	57%
Lose our ability to solve problems on our own	55%
Lose our ability to accept imperfections in people	32%
Consider ourselves a "lesser" race than robots	22%
Lose our ability to accept contradictory opinions	25%
None of these	10%
Use robots to take control and enslave much of humanity	33%
Become less imaginative and creative because everything is logic based	44%
Use robots to wage war and ultimately destroy the planet	42%
Lose our ability to believe in a higher power/be spiritual	23%

>> WHO IS THE BIGGER THREAT TO HUMANITY: ROBOTS OR HUMANS? <<

One of the scenarios we posited is familiar to sci- fans: Will machines eventually take over and control human society? Nearly a quarter of our sample fear this dystopian future will actually take place. Again, we see a pronounced male/female split, especially in some markets. In France, for instance, 20% percent of males and 35% of females think robots will take over; in the US, those numbers are 19% and 27%, respectively.

It turns out, though, that people actually trust AI more than they do their own species: While only 22% of Prosumers fear AI will take over and control humanity, an astounding 44% worry that humans are going to use robots to wage war and ultimately destroy the planet. And 33% of Prosumers fear humans will use robots to enslave much of humanity.

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

MYANMAR

Take over and control human society	43%
Liberate us from repetitive tasks and give us more time to enjoy life	42%
Solve our most pressing problems	35%
Take away jobs and leave millions of people unemployed	30%
Create new jobs that we cannot even imagine today	24%
Destroy our planet	18%
Help humanity progress	16%
None of these	12%

WORLDWIDE

Take over and control human society	24%
Liberate us from repetitive tasks and give us more time to enjoy life	41%
Solve our most pressing problems	26%
Take away jobs and leave millions of people unemployed	41%
Create new jobs that we cannot even imagine today	31%
Destroy our planet	15%
Help humanity progress	39%
None of these	7%

>> A JOB LOST IS A JOB GAINED. WAIT, IS IT? DEPENDS ON THE CULTURE. <<

Jobs are often a big part of the debate when the topic of AI emerges. As with the industrial revolution of the 18th and 19th centuries, there is the question of whether more jobs will be created or lost as a result of automation. Prosumers are pretty evenly split on this topic, with 39% believing AI will take away jobs and leave millions unemployed, and 37% saying AI will create new jobs that we cannot even imagine today. (Granted, the two scenarios are not mutually exclusive.)

When looking at individual countries, a cultural bias is revealed between markets where AI development is already common and those that have been slower to embrace these new technologies. At present, China is among the countries with the highest concentrations of industrial robots, and in this case familiarity has bred comfort: A majority of Chinese surveyed (52%) think AI will create jobs we cannot even imagine today, while just 27% worry it will leave millions unemployed. In the US—which PwC estimates will lose nearly 40% of jobs to automation by 2030—opinions are far more divided: 40% of the sample believe AI will take away jobs, while 32% believe it will create them. There is a correlation with technology affinity here: 53% of Americans surveyed who do not currently own a smartphone fear AI will destroy jobs, compared with 38% of smartphone owners. At the other end of the spectrum is highly traditional France, where just 28% of respondents believe AI will create jobs, compared with the 40% surveyed who believe it will destroy the livelihoods of millions.

The cultural divide between new world which trust AI and old world which worry it - is not prevalent in Myanmar as people are even more worried of AI than in developed markets.

NEW WORLD VS. OLD: A CULTURAL DIVIDE

IN THE FUTURE, ARTIFICIAL INTELLIGENCE WILL...

LIBERATE US FROM REPETITIVE TASKS/GIVE US MORE TIME TO ENJOY LIFE

42%   66%   35%

HELP HUMANITY PROGRESS

16%   65%   27%

CREATE NEW JOBS WE CAN'T EVEN IMAGINE TODAY

24%   53%   28%

SOLVE OUR MOST PRESSING PROBLEMS

35%   47%   18%

TAKE AWAY JOBS AND LEAVE MILLIONS UNEMPLOYED

30%   27%   40%
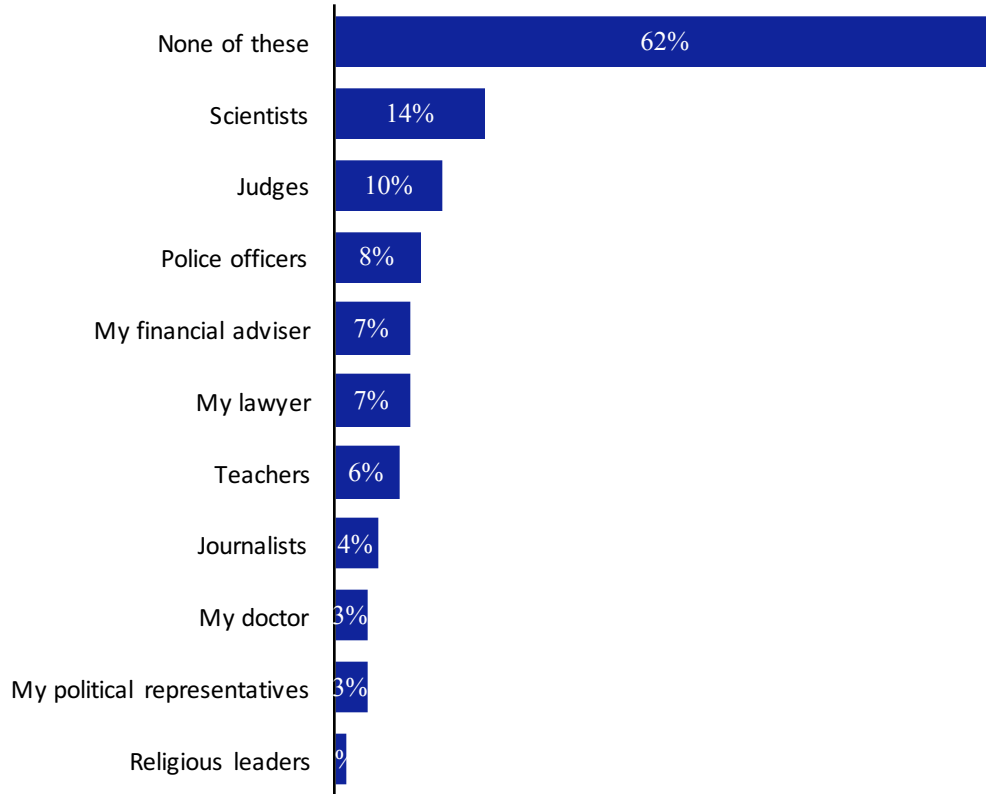
TAKE OVER AND CONTROL HUMAN SOCIETY
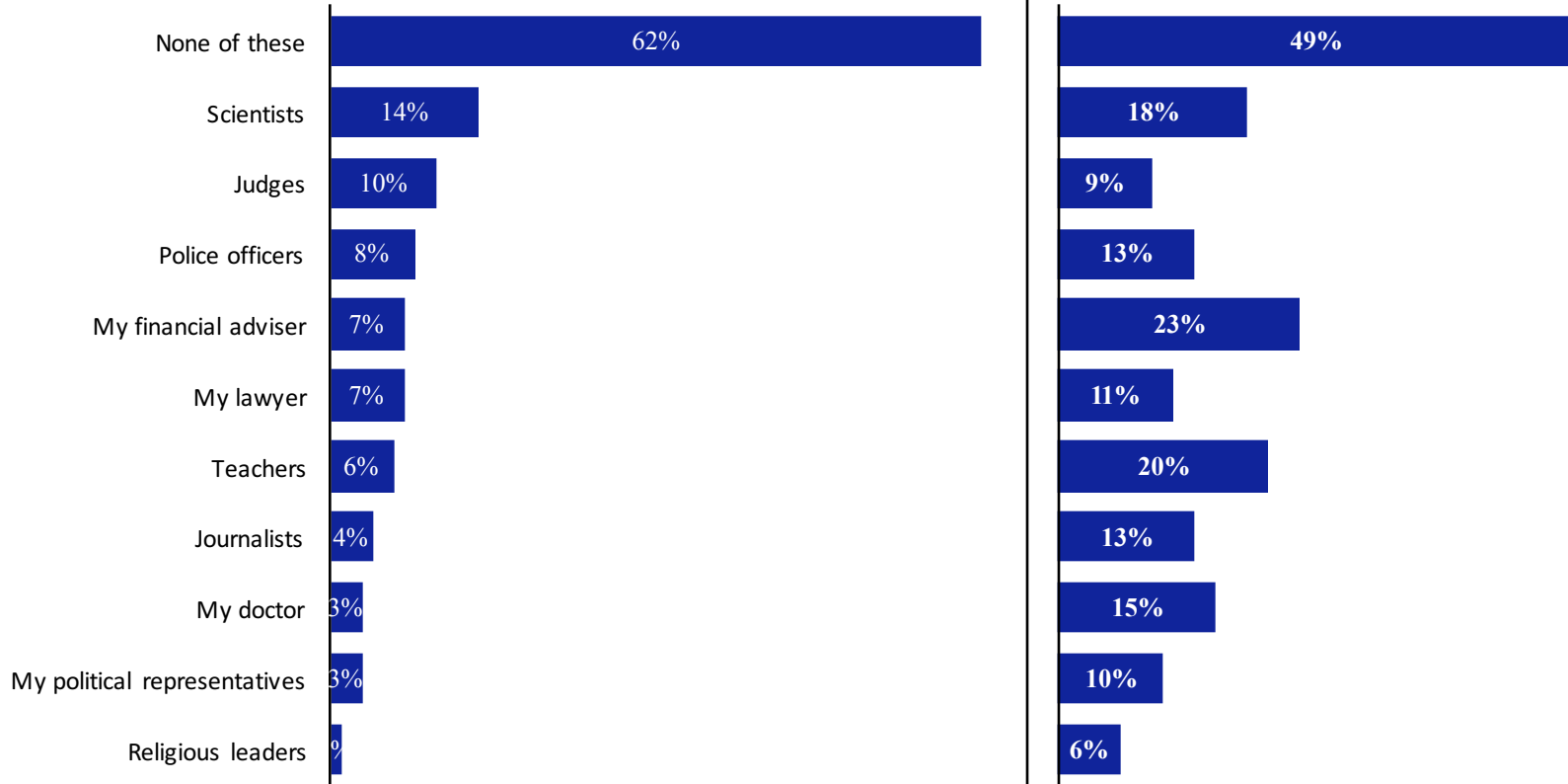
43%   14%   28%

DESTROY OUR PLANET

18%   7%   17%

I'M COMFORTABLE WITH THE IDEA OF ARTIFICIAL INTELLIGENCE MACHINES ACTING AS ...

MYANMAR

None of these	62%
Scientists	14%
Judges	10%
Police officers	8%
My financial adviser	7%
My lawyer	7%
Teachers	6%
Journalists	4%
My doctor	3%
My political representatives	3%
Religious leaders	%

WORLDWIDE

None of these	49%
Scientists	18%
Judges	9%
Police officers	13%
My financial adviser	23%
My lawyer	11%
Teachers	20%
Journalists	13%
My doctor	15%
My political representatives	10%
Religious leaders	6%

>> HUMANS (STILL) WANTED <<

There are a lot of jobs robots can manage at least as well as humans—and certainly more cheaply and dependably. **But we have not yet reached the point at which most of us are willing to let an intelligent machine take up just any position**. We gave our respondents a list of 10 professions and asked which functions they would be comfortable handing over to intelligent machines. Globally, a slight majority (58% of men and 45% of women) are already willing to see at least one key profession placed in the bionic hands of our robot friends.

A NUMBER- OR FACT-BASED JOB?
MS. ROBOT, YOU ARE HIRED!

Nearly a quarter of global respondents are comfortable with the idea of machines serving as their financial advisors, and 1 in 5 are OK with the notion of robotic educators. That makes sense, given that these jobs require a good deal of number crunching and information sorting. Nearly 1 in 5 Prosumers and males would be willing to consult a robotic physician, and 21% of both groups would happily let machines work as scientists.

AN EMOTION- OR JUSTICE-BASED JOB?
SORRY, MR. ROBOT, WE'LL PASS.

Currently, people are least willing to turn over to robots jobs that require especially high levels of emotional intelligence and/or that involve making decisions with important societal consequences. Just more than 1 in 10 are willing to see robots take over the jobs of police officers, journalists, or lawyers. Even fewer want to see judges, political representatives, or religious leaders replaced by robots.

CULTURAL DISTINCTIONS

Looking at the individual countries surveyed, China and India stand out for their ahead-of-the-curve embrace of automated professionals. Eight in 10 Indians and nearly 9 in 10 Chinese are comfortable with the idea of intelligent machines taking on at least one of the 10 listed professions. Among Chinese respondents, a majority (51%) already are comfortable with the notion of having an automated financial advisor, 42% would be willing to put themselves under the care of a robotic doctor, 36% are OK with the idea of machine-based teachers, and 32% have no problem with automated police officers. In India, a third or more of the sample are comfortable with the notion of AI-based teachers (42%), financial advisors (41%), and scientists (35%). These figures contrast sharply with some of the more developed markets. In the US, UK, France, Germany, Australia, Canada and **Myanmar**, among other countries, none of the 10 potentially automated professions garnered the approval of even a fifth of the sample.

It is also worth noting that millennials are not substantially more likely than the older age groups to support AI-based professionals— although this could be because they are the workers most likely to find themselves out of a job.
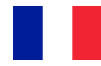
I AM COMFORTABLE WITH THE IDEA OF AI MACHINES ACTING AS MY...

FINANCIAL ADVISOR

Myanmar 7%	France 14%
China 51%	US 17%
India 41%	UK 17%

DOCTOR

Myanmar 3%	France 9%
China 42%	US 11%
India 27%	UK 8%

DIGITAL LANDSCAPE

OUR
MARKET
SNAPSHOT

Digital Development Journey

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

2011
- Government reduced online censorship

2012
- Mobile penetration: 9%
- Internet penetration: 1%

2014-2015
- Oreedoo & Telenor came in and provided 3G.
- 6% of all smartphone supplies was going to Myanmar - made it 4th in the world.
- Sim card cost: $1.50
- Mobile penetration: 50%
- Internet penetration: 12.5%

2016
- Oreedoo launched the country's first 4G data
- Followed by Telenor & MPT.
- Sim card cost: $1.00
- Mobile penetration: 90%
- Internet penetration: 19.3%
- Smartphone usage: 80%

Myanmar is known as a **Leapfrog Nation** - "leapfrogged" by going directly to being a smartphone country and hasn't followed the usual path that developing markets go through.

Digital Landscape Overview

Summary

Internet users: 14.0M
% penetration: 26%

Social Media users: 14.0M
% penetration: 26%

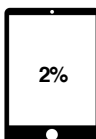**Mobile subscription: 50.56M**
% penetration: 93%

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.

Social Media & Mobile

Monthly Active Users	% Users accessing via Mobile	% Users accessing FB Daily	Male Profiles	Female Profiles
Facebook - 14.0M Nielsen – 10.6M	93%	49%	64%	36%

Transportation
5%

Utility & Commerce
10%

Social & Communication
40%

Entertainment & Games
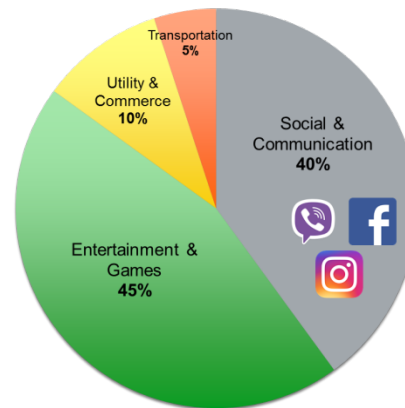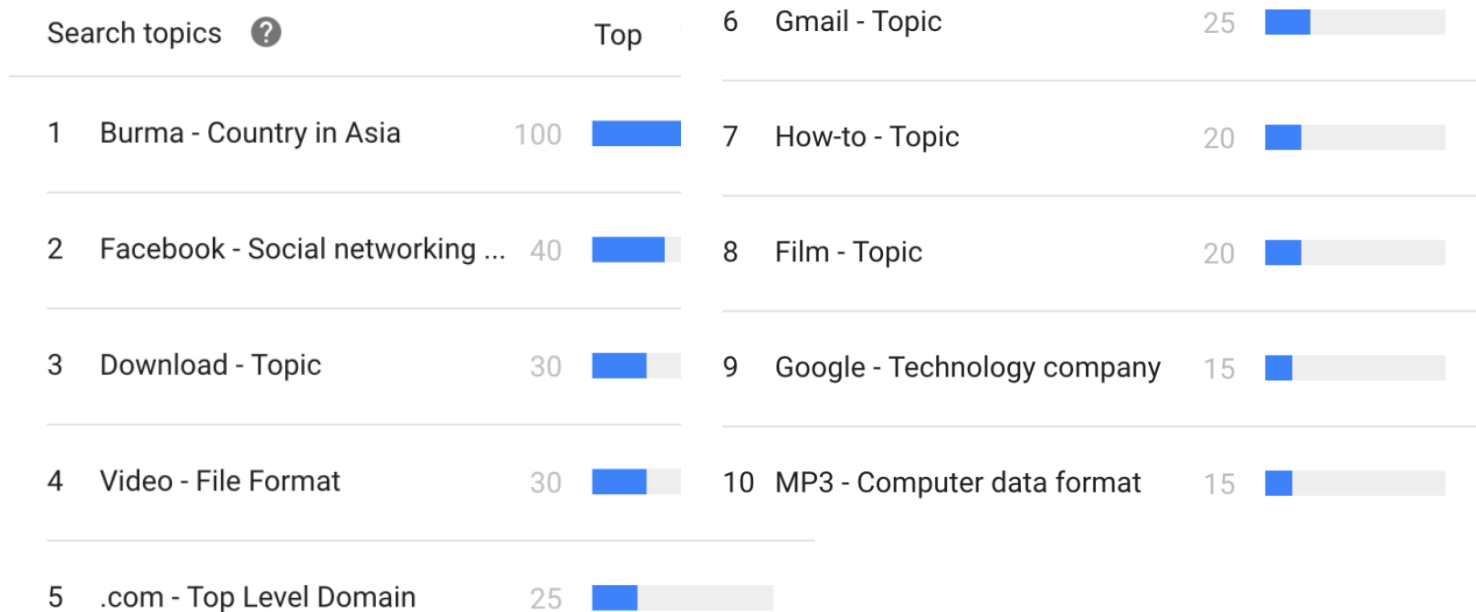45%

80 mins
Users time spent on other apps & content

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

Google Top Search Topics in 2016

Search topics ❓   Top

1	Burma - Country in Asia	100
2	Facebook - Social networking ...	40
3	Download - Topic	30
4	Video - File Format	30
5	.com - Top Level Domain	25

6	Gmail - Topic	25
7	How-to - Topic	20
8	Film - Topic	20
9	Google - Technology company	15
10	MP3 - Computer data format	15

Google Trends

Google Top Search Trends in 2017

Search topics	Rising
1 Legend - Literary genre	+450%
2 Hollywood - Neighborhood in Los Angeles, Cali...	+300%
3 Subscriber identity module - Topic	+90%
4 .org - Top level domain	+90%
5 DJ mix - Topic	+90%

Search topics	Rising
6 BTS - Band	+70%
7 Windows 10 - Computer	+70%
8 Remix - Topic	+70%
9 Espionage - Topic	+70%
10 Action Film - Film genre	+60%

Google Trends

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Thank You