

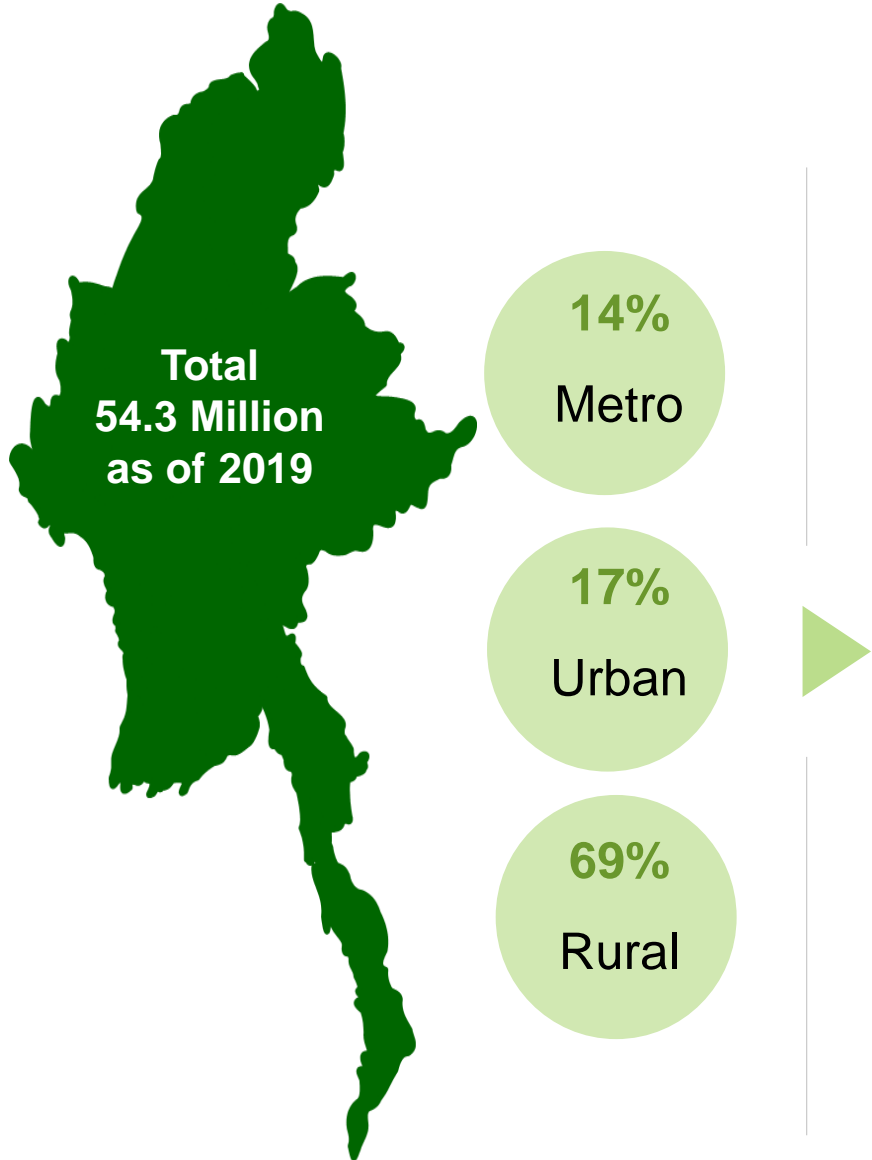
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MYANMAR MEDIA AUDIENCES 2019 HIGHLIGHTS

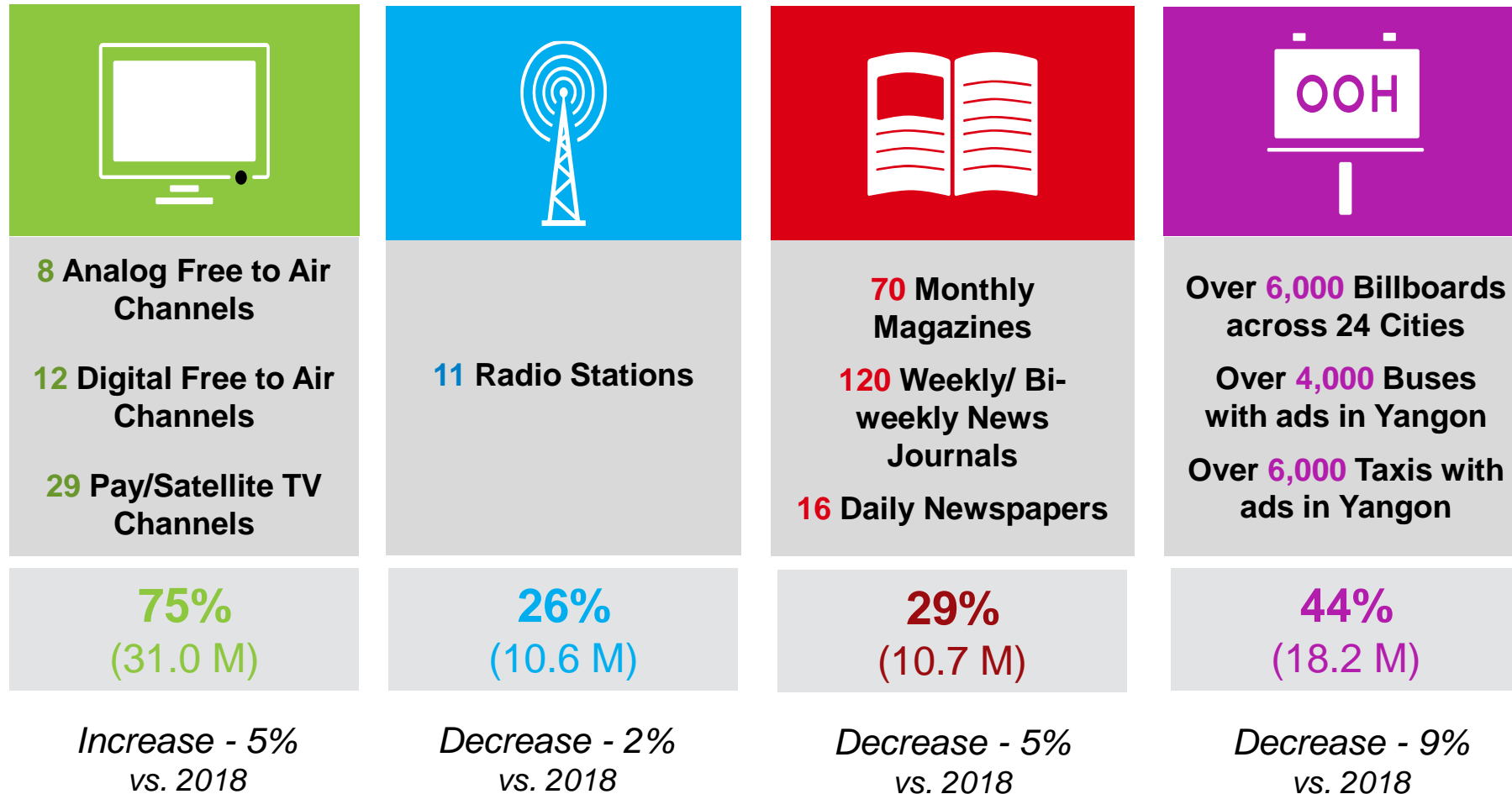
October 2019

MYANMAR POPULATION AT A GLANCE



IN TOTAL MYANMAR,
AROUND
93%
EXPOSED TO AT LEAST
ONE FORM OF MEDIA IN
THE PAST MONTH

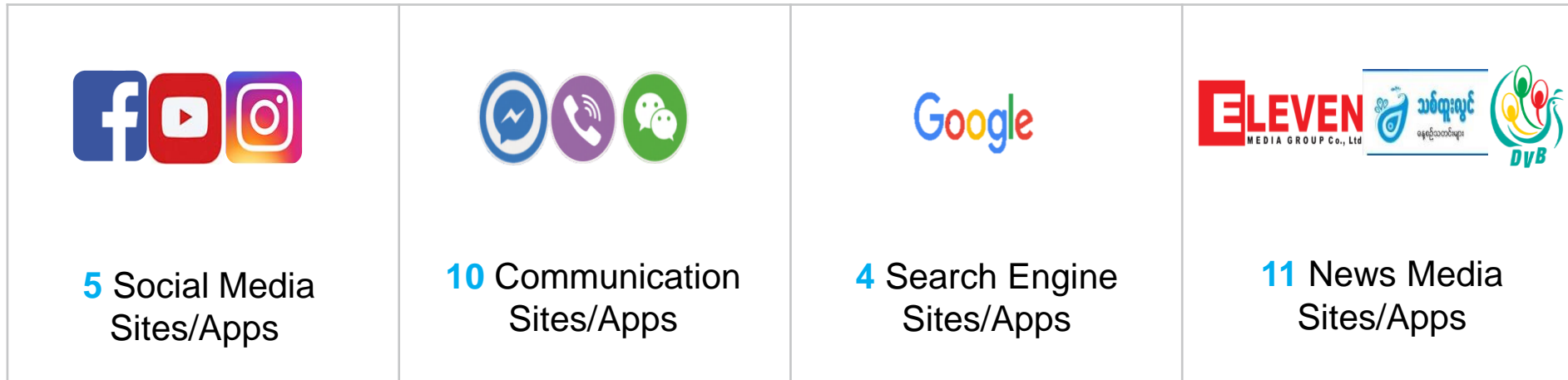
MYANMAR TRADITIONAL MEDIA AT A GLANCE



(Base: Ages 10-64, Total Myanmar Population 2019 = 41.5m)

Source: 2018 & 2019 Nielsen MMRD Consumer & Media View (CMV)

DIGITAL SITES/APPS USED BY MYANMAR MEDIA CONSUMERS



36%
(14.9 M)

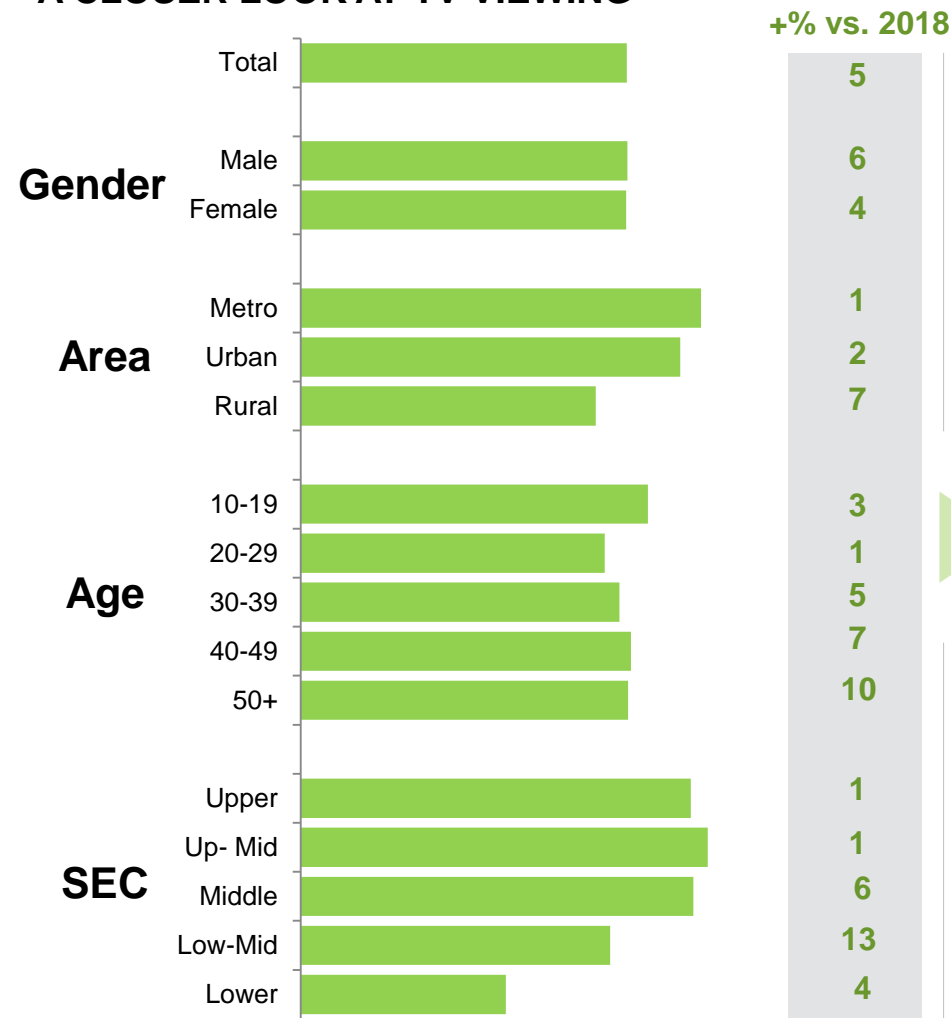

*Increase - 2%
vs. 2018*

MEDIA CONSUMERS' BEHAVIOR


30.8M HAVE ACCESS TO TV AT HOME ALTHOUGH THERE IS STILL SOME INCIDENCE OF TV VIEWING OUT OF HOME ESPECIALLY IN RURAL

TV VIEWING INCIDENCE

A CLOSER LOOK AT TV VIEWING

2 Hrs 13 Mins
Average Time Spent Viewing TV Per Day



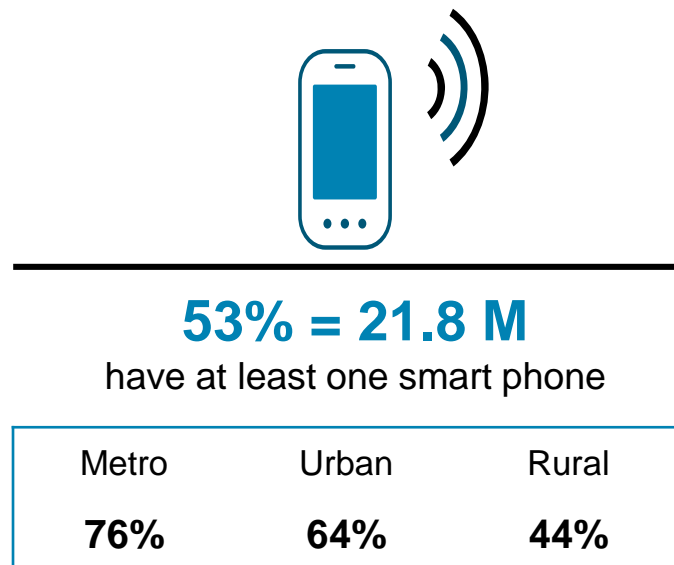
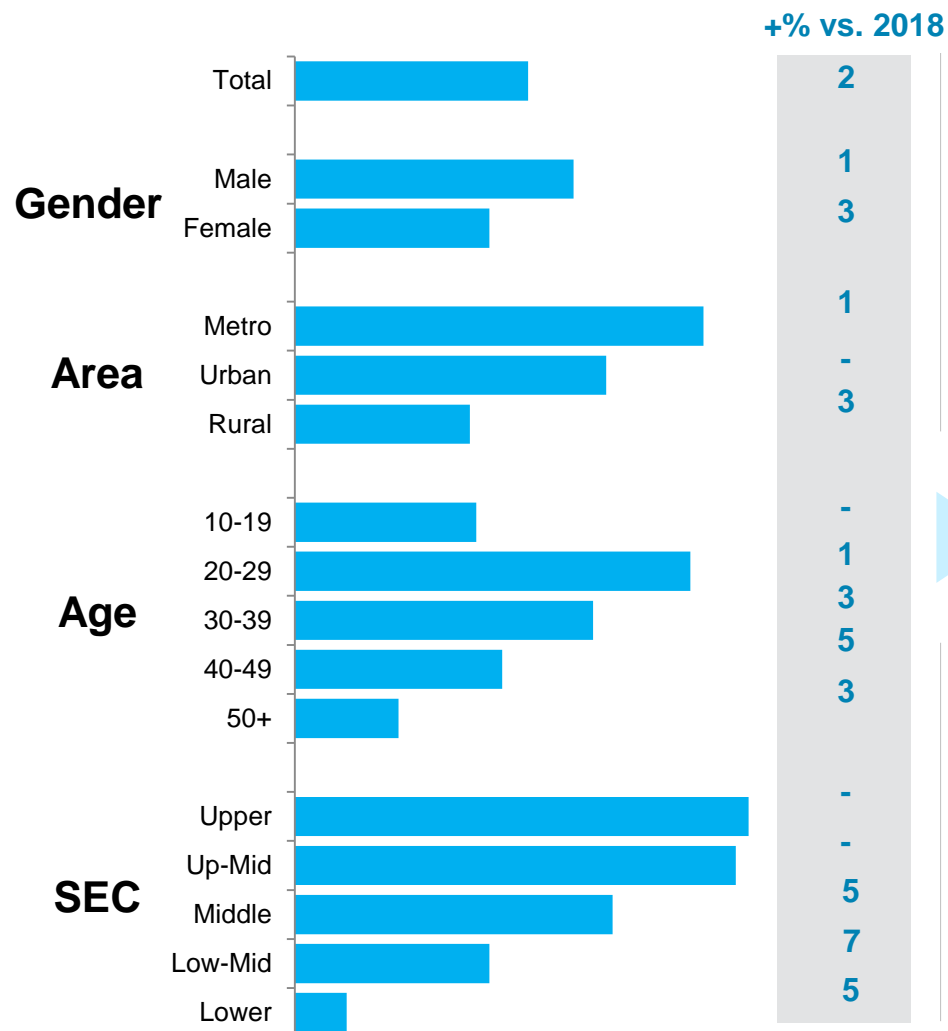
74% = 30.8 M
have at least one TV set at home

Metro	Urban	Rural
95%	94%	65%

MEANWHILE, 21.8 M--ABOUT HALF THE POPULATION--HAVE A SMARTPHONE, THOUGH SLIGHTLY LESS ACCESS THE INTERNET

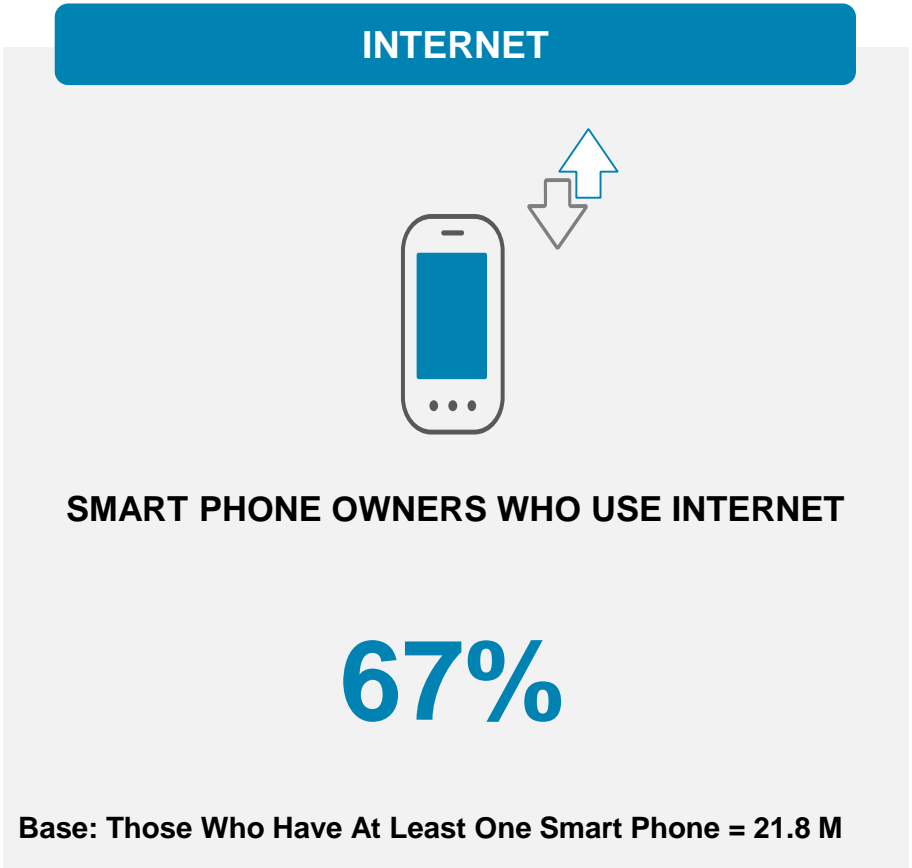
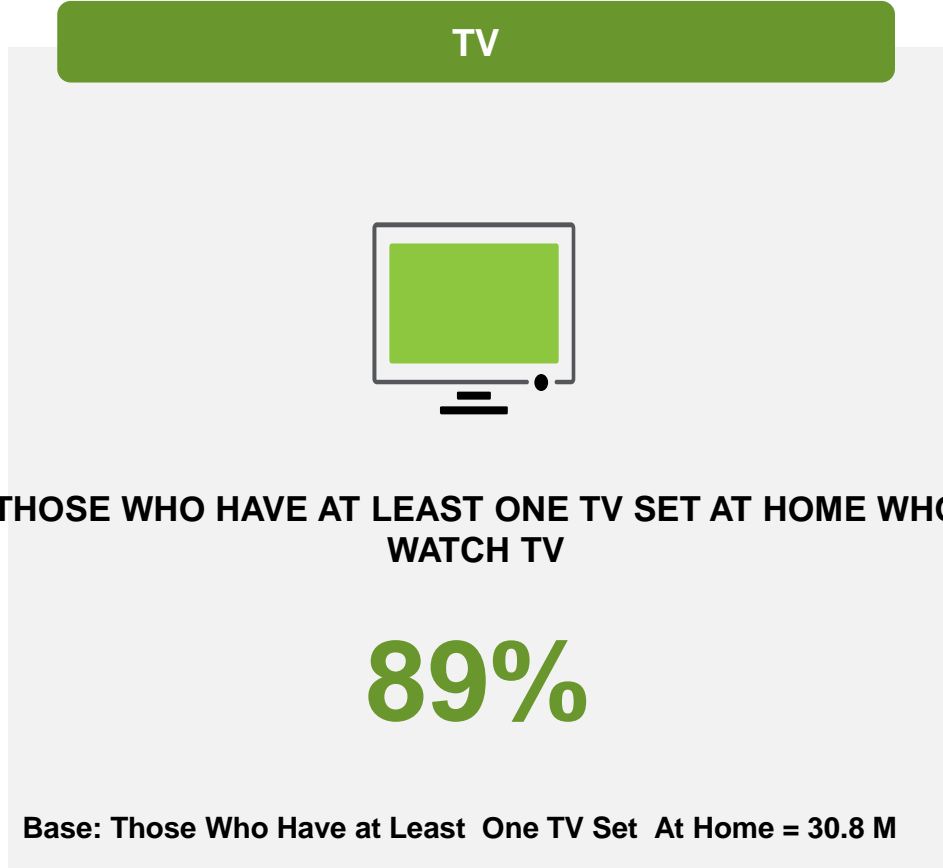
INTERNET USAGE INCIDENCE

A CLOSER LOOK AT INTERNET USAGE



SCREEN USAGE FOR TV AND INTERNET SHOW SOME DIFFERENCES, WITH TV OWNERS MORE LIKELY TO WATCH TV THAN SMARTPHONE OWNERS TO GO ONLINE

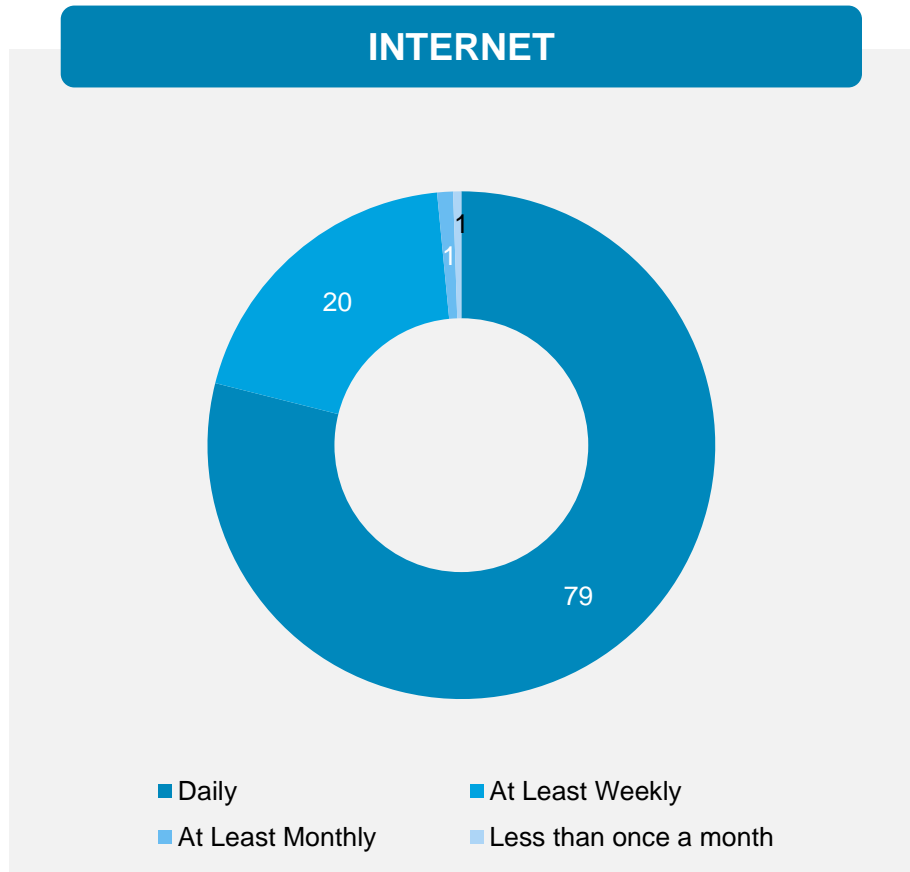
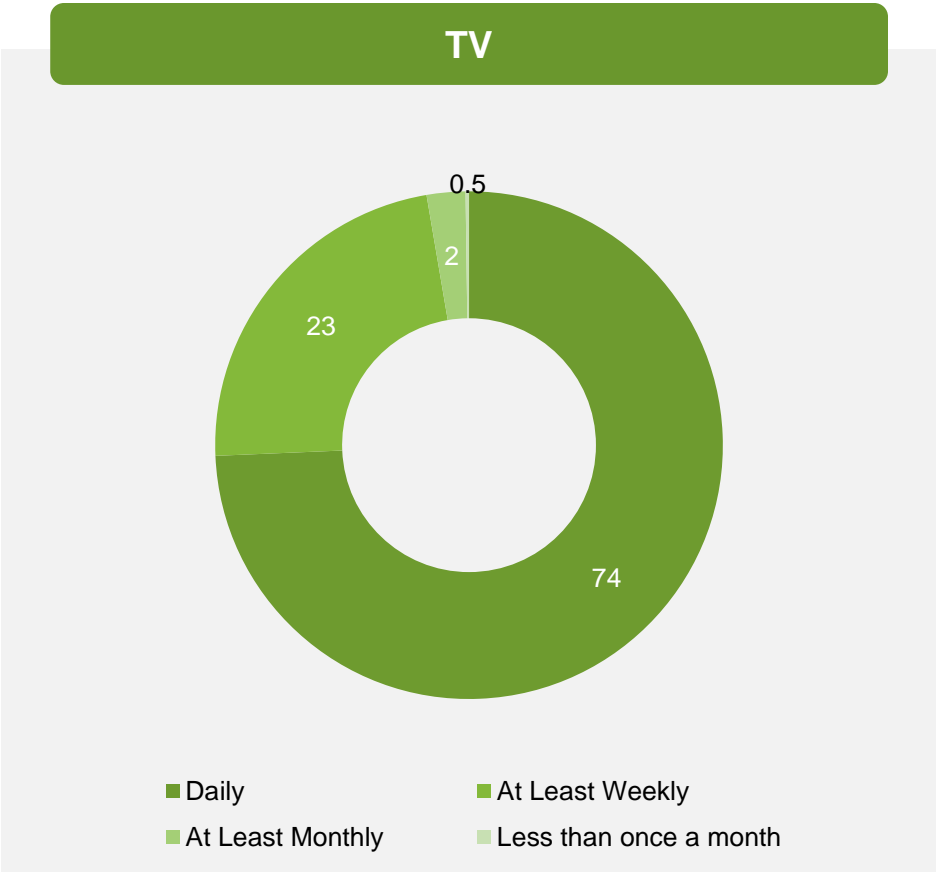
VIEWERS/USERS ACCESSIBILITY VIA DEVICES



Source: 2019 Nielsen MMRD Consumer & Media View (CMV)

HOWEVER, INTERNET USERS DO EXHIBIT HIGHER SCREEN ENGAGEMENT AS THERE ARE MORE WHO GO ONLINE DAILY.

FREQUENCY OF VIEWING TV AND USING INTERNET Data in %



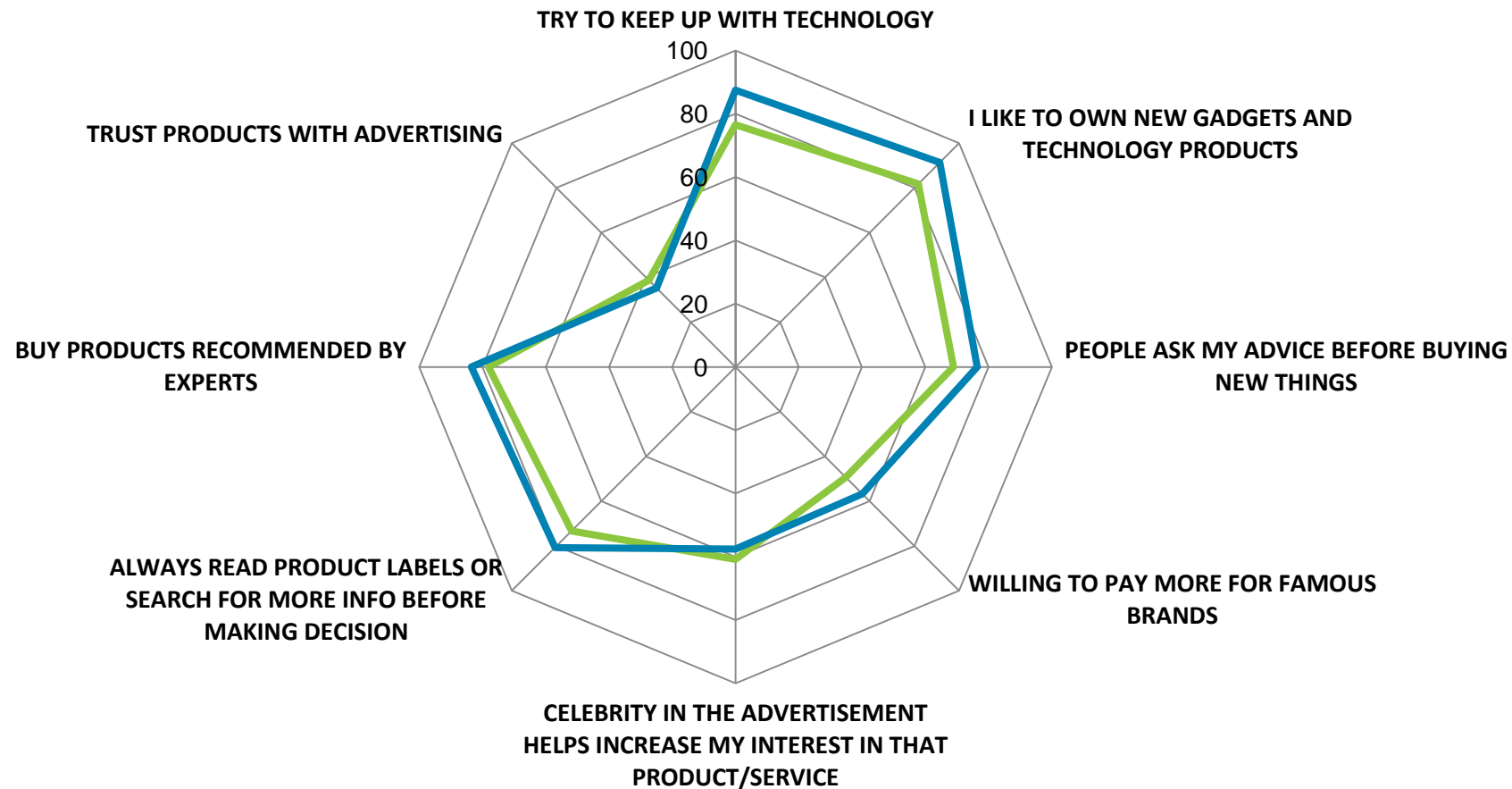
Source: 2019 Nielsen MMRD Consumer & Media View (CMV)

TV VIEWERS & INTERNET USERS ARE SIMILARLY DRAWN TO CELEBRITY ENDORSERS AND FAMILIAR BRANDS

MEDIA & CONSUMPTION ATTITUDES

Data in %

— TV Viewers — Internet Users



BRINGING YOUR WORLD INTO OURS

DEEP AND WIDE SOLUTIONS MEETING YOUR STRATEGIC AND TACTICAL BUSINESS NEEDS

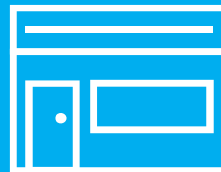
WE KNOW THE
CONSUMER



CONSUMER INSIGHTS

FMCG, TELECOM, TECHNOLOGY,
CONSUMER DURABLES,
AUTOMOBILE, FINANCIAL
SERVICES

WE KNOW
RETAILERS
&
MANUFACTURERS



RETAIL MEASUREMENT

RETAIL AUDIT IN 9 URBAN STATES,
30+ KEY CATEGORIES, RETAIL
CENSUS,
STORE AUDIT (STORE OBSERVATION)

WE KNOW THE
MEDIA



MEDIA INSIGHTS

TELEVISION AUDIENCE
MEASUREMENT, AD SPEND,
CONSUMER PRODUCT USAGE &
MEDIA HABITS SURVEY

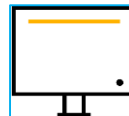
KEY CONTACTS



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