Thailand Media Landscape and Trend Update

October 27th, 2022

Media Agency Association of Thailand

ดร.ธราภุช จารุวัฒนะ (บุ้ง)
CEO, IPG MEDIABRANDS/MAAT's President

EXPERIENCE: 23 years

- Tharaputh started his career as Creative of JSL for Joh Jai and the opening/closing ceremonies of Bangkok Asian Game 1998. After that, he expanded area of expertise by joining MindShare and subsequently joined Initiative in 2000 where he executed several turnkey communication campaigns especially in the advertising media planning for dynamic consumer products. His experience includes working in Thailand's highest rating TV channel, Thai TV3.
- He was responsible for both global and local accounts including Unilever, Pfizer-Viagra, Sony, BMW & MINI, True, and Big C.
- In 2015 Tharaputh was appointed as CEO, leading the team to win new businesses: Nestle, DTAC, Lazada, foodpanda, and grew significant volume amid the industry slowdown period continuously. IPG Mediabrands Thailand finally became number one RECMA Quality Agency.
- Apart from being CEO, he is also a part time lecturer for leading institutes in Thailand, producer of Unseen Football program, and jury for 2017 Cannes and Adman Awards. Recently, he's elected to be Media Agency Association of Thailand (MAAT) President.
- Tharaputh has degrees in Master of Science in Communication, Fort Hays State University and Ph.D. in Sport Science, Kasetsart University, Thailand.
- He is interested in Sprint triathlon, dogs, and golf.

กนกกาญจน์ ประจงแสงศรี
MD, Data & Analytics, IPG Mediabrands, MAAT Consultant

EXPERIENCE: Over 20 years

- Khanokkhan started from Media Planning at Dentsu Media handling big Japanese accounts such as Toyota, Kao Commercial, Ajinomoto for 6 years.
- In 2005, a new career journey with Initiative has begun, managed the activities of research projects including seasoned research, communications, brand, advertising research projects according to best practices, maintaining the highest quality. Oversee IPG Mediabrands proprietary technology, tools and process, ensure smooth operation and provide training to all level of media specialists both in Thailand and nearby countries in the same network such as Vietnam, Cambodia, Malaysia and Taiwan.
- 2007-2009 Manage a team across all daily operations from start to finish of the research projects, proprietary tools operation, training and supports. Assigned additional role as a IPG's Media Principle of "IPG Management Trainee Program", aiming to groom a new graduate to become a media experts' young blood, the program fundamentally provide fundamental media knowledge, terminology, media math, media planning/ buying optimization tools including basic media and consumer analytical skills.
- 2010-2014 extended experiences into advanced statistics model or econometric with successful analytic project for major brands such as Coca Cola, Johnson and Johnson, Cerebos, Great Eastern Drug, Big C, DKSH, Nestle. Additional extended role in strategic planning area, using data and analytics to design communication strategy and ideas for Baby products Dryperz.
- 2014 – 2017, extended diversity experience in Media Buying and Trading area, using data and analytics capabilities to support trading and negotiation team to optimize media investment and maximize full business potential.
- Present role, inspire and lead a team of analytics and statistics experts. Providing data driven marketing solutions and ensure that the results of analytics projects provide actionable insights that effectively and efficiently build business and brand value.

AGENDA

- Media Landscape And Overall Update
- The future of TV ads, Cross-Platform Ratings
- Advertising Spending Update
- A more likely scene of Media Landscape

Media Landscape Update

Media Agency Association of Thailand

Total Thailand Population 58.2 million

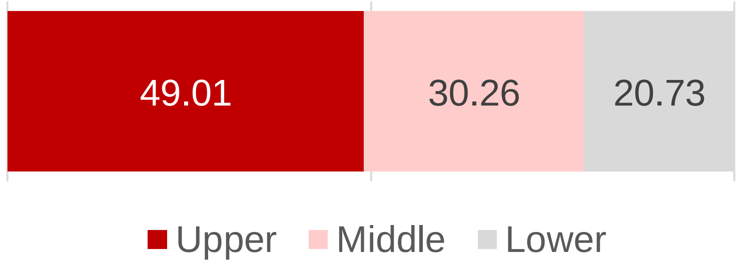
TOTAL THAILAND POPULATION

ALL 12+ NA

58,241,000 Persons

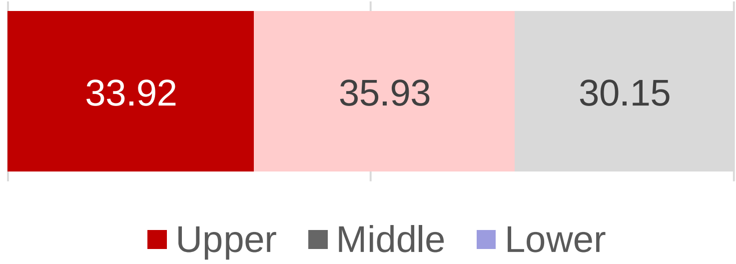
8.5 Millions

14%



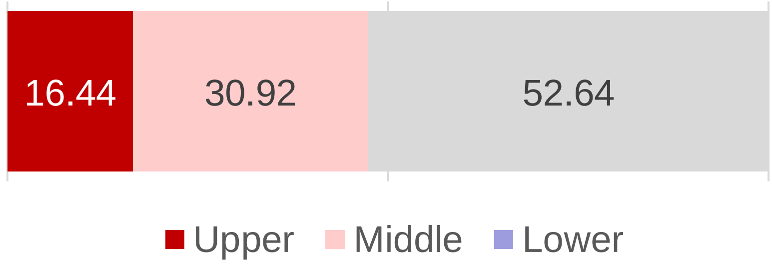
13.3 Millions

23%



36.7 Millions

63%

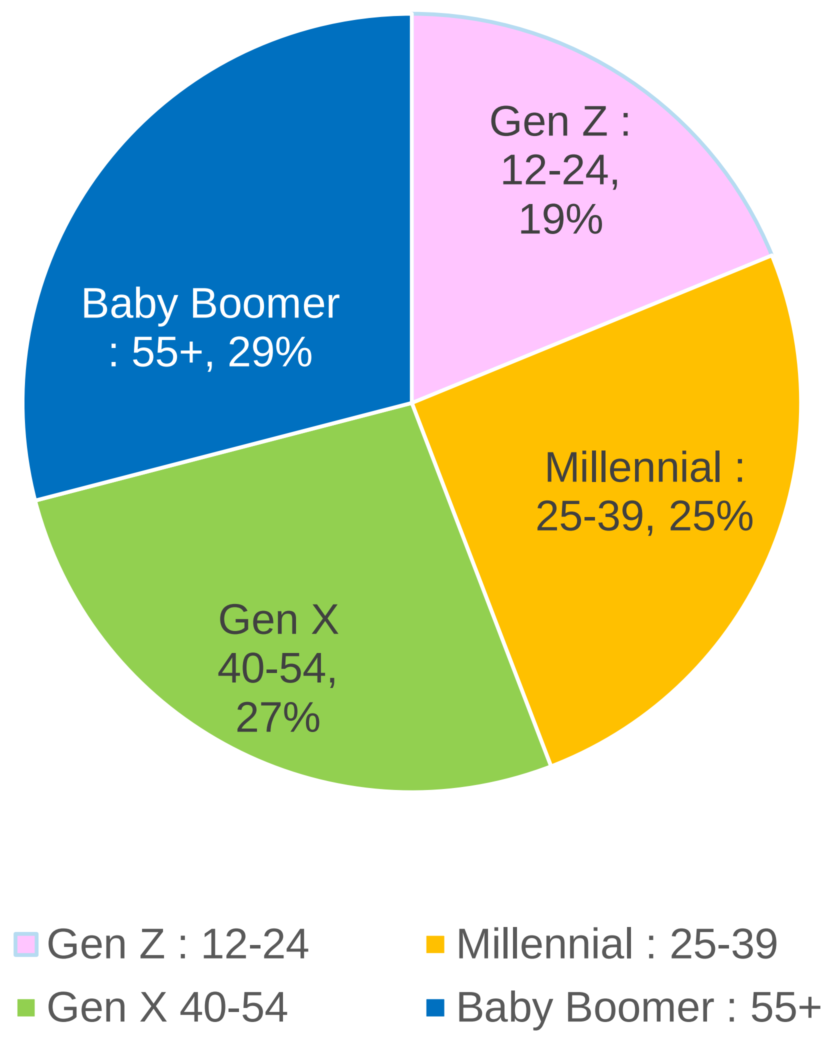


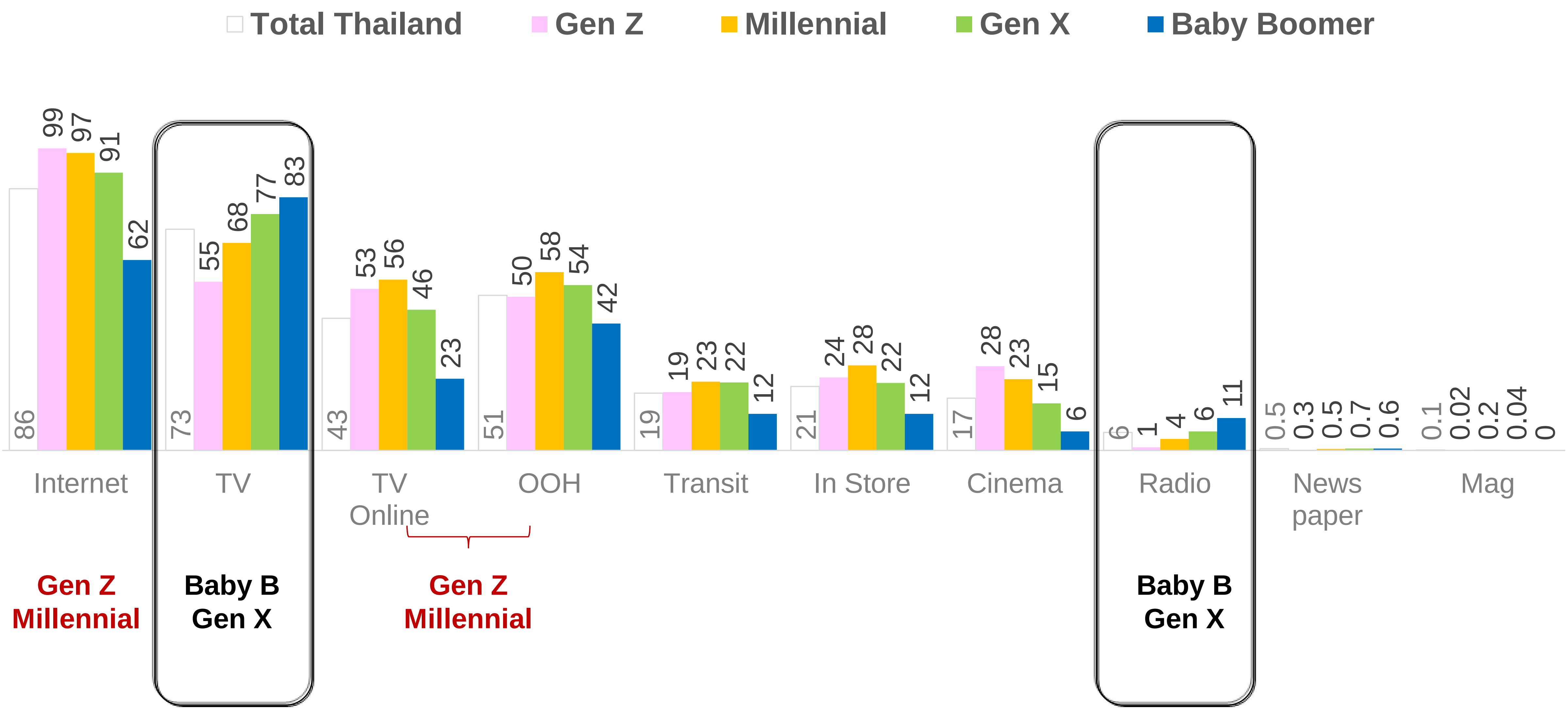
AGB Nielsen : Thailand CMV 2022-3 (Jul21-Jun'22)

Different media platforms, different audiences

TOTAL THAILAND POPULATION

ALL 12+ NA
58,241,000 Persons

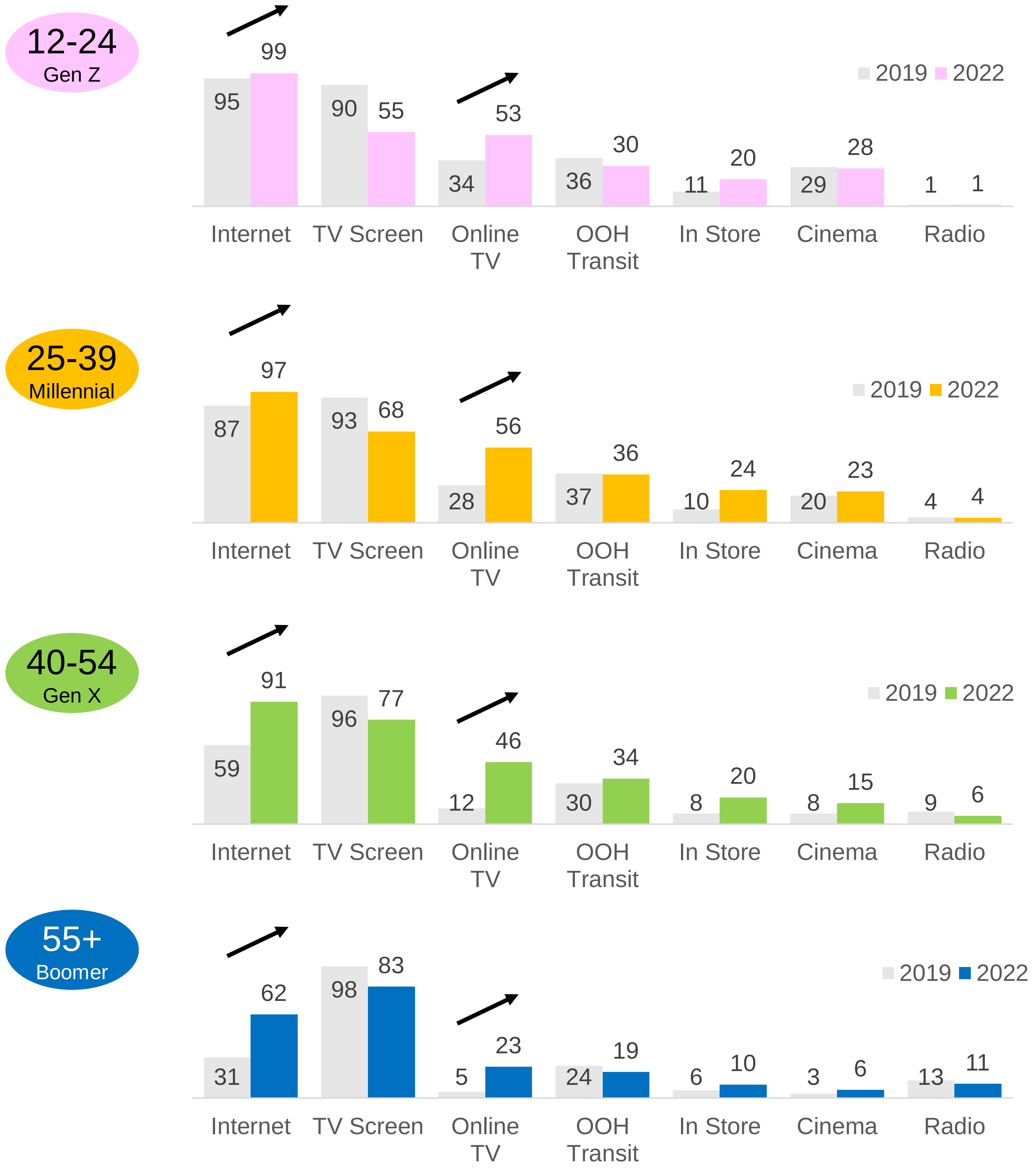


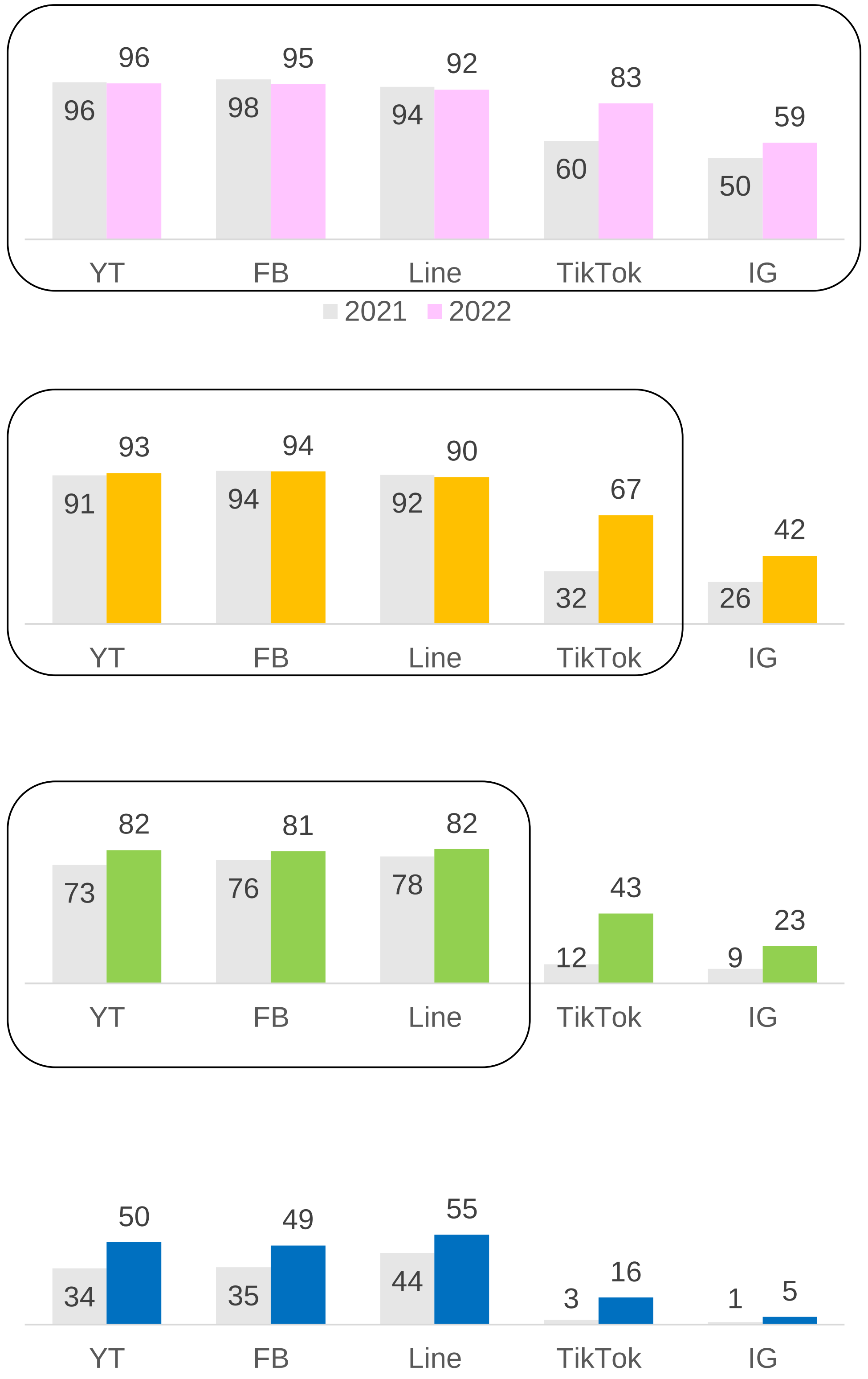


Linear TV and Radio Audiences are getting old

AGB Nielsen : Thailand CMV 2022-3 (Jul21-Jun'22) / % Population and % Media Consumption by Age Group

COVID-19 forcing the great digital acceleration



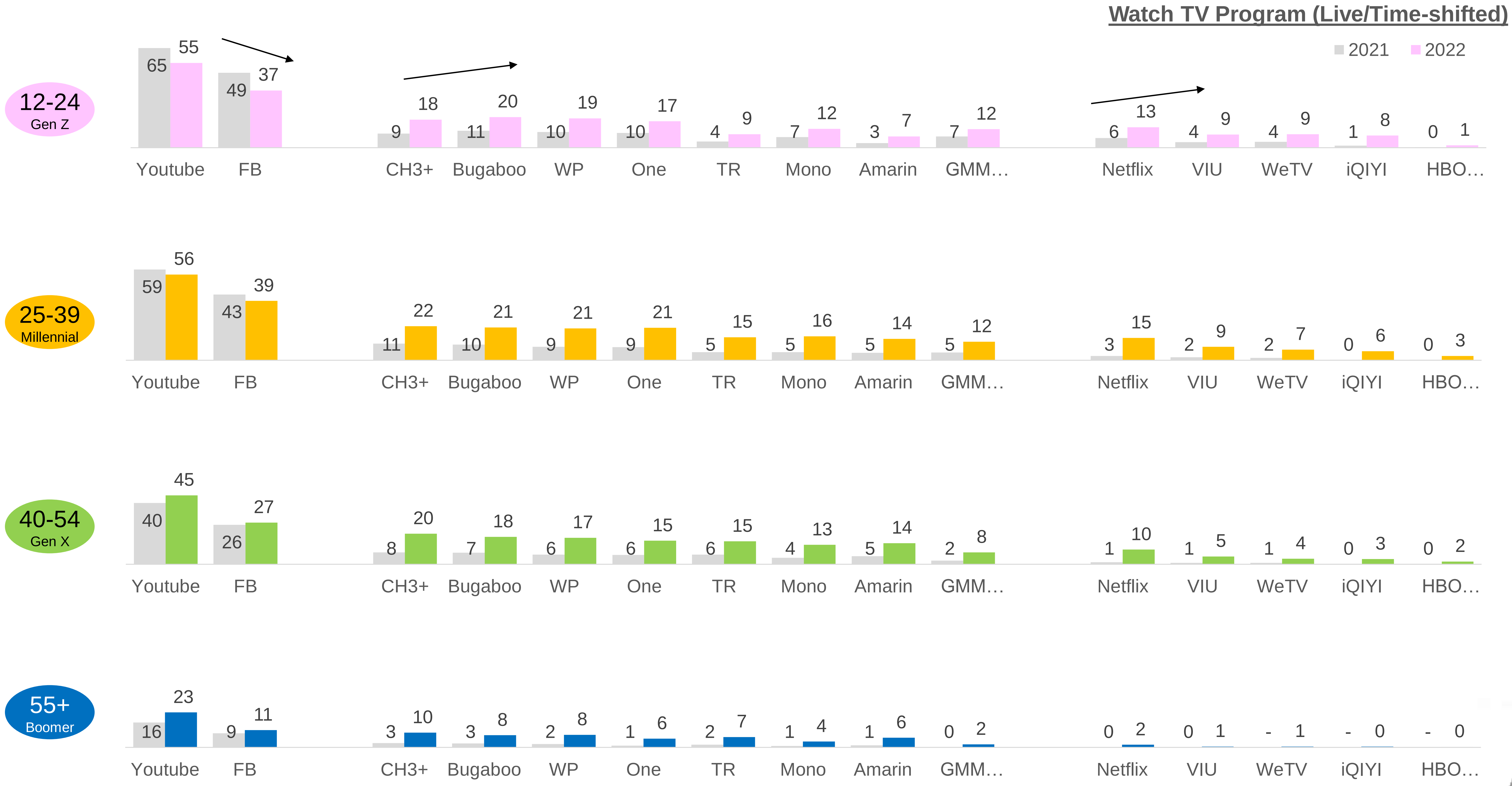


Social media is now the mainstream media

Penetration has surpassed TV

AGB Nielsen : Thailand CMV / %Media Consumption by Age Group

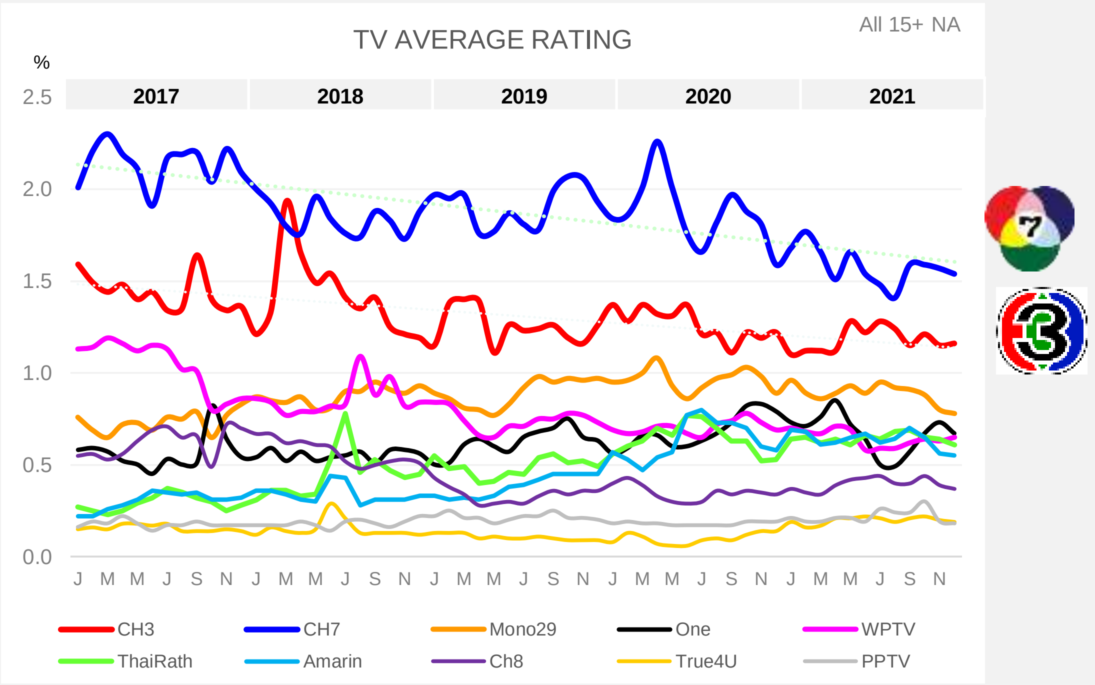
YouTube dominates online video platforms follow by fragmented long-tailed



AGB Nielsen : Thailand CMV / %Media Consumption by Age Group

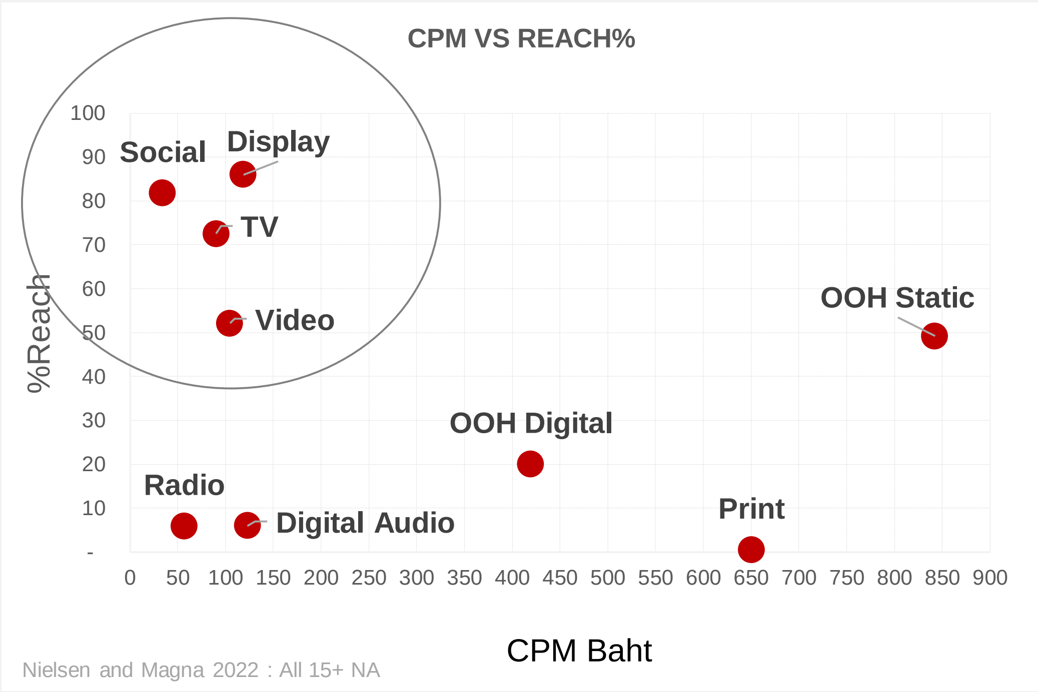
TV efficiency and effectiveness has been challenged by online media

Viewership trends



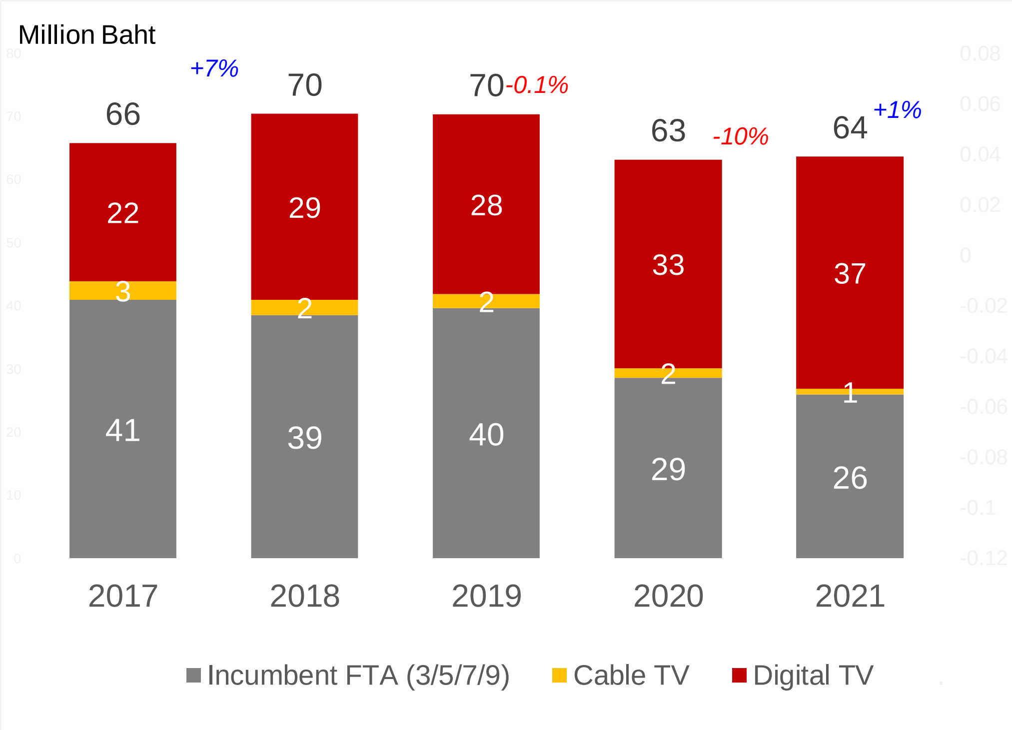
Viewing trends continue to drop as a result from shifting behavior to consume more from online TV

Media Efficiency



TV efficiency and effectiveness has been challenged by online media

TV Spending trend



TV spending trend and remain stagnant since the pandemic.

AGB Nielsen : Thailand CMV / %Media Consumption by Age Group

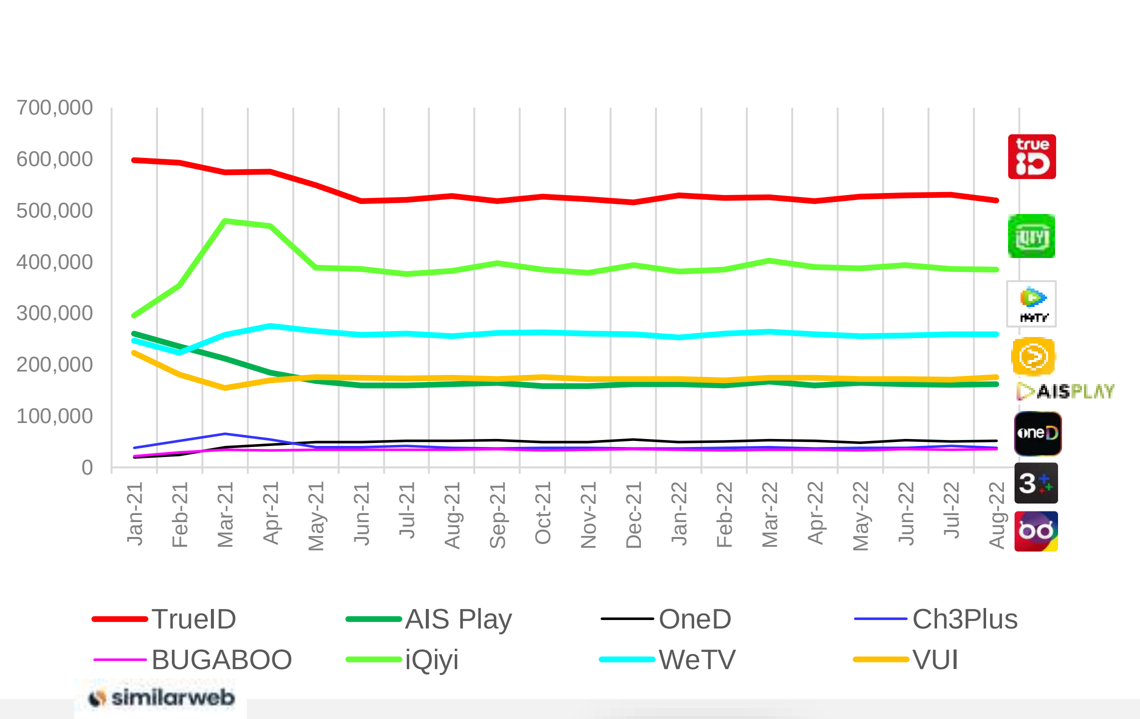
Traditional players are transforming, whilst new players are coming in

Broadcasters are Transforming

- Build Own Platform / Collect 1P Data

Migrate Long-form contents from YouTube into Broadcaster's own platform

More fragmented from new players

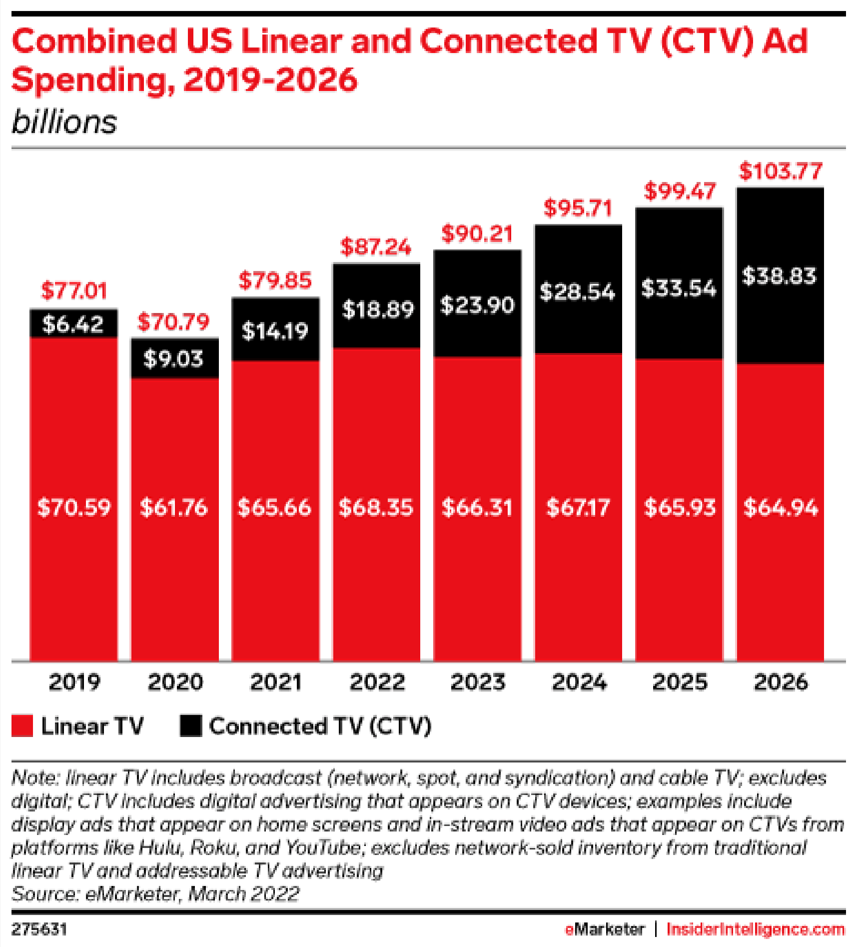


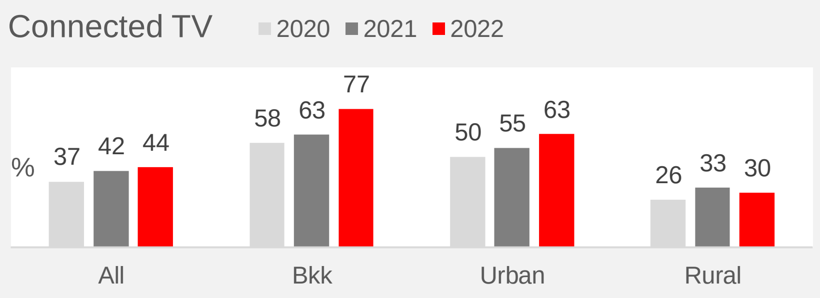
Daily Active Users (Jan-Aug22)

Netflix	HBO GO	prime video	Disney+ hotstar
1.2 Mil	14,000	8,000	1,000

- Netflix plans to sell about four minutes of commercials per hour for the ad-supported service
- Netflix Ad Supported will start in US, France, Germany, Australia, Canada.

CTV is the next





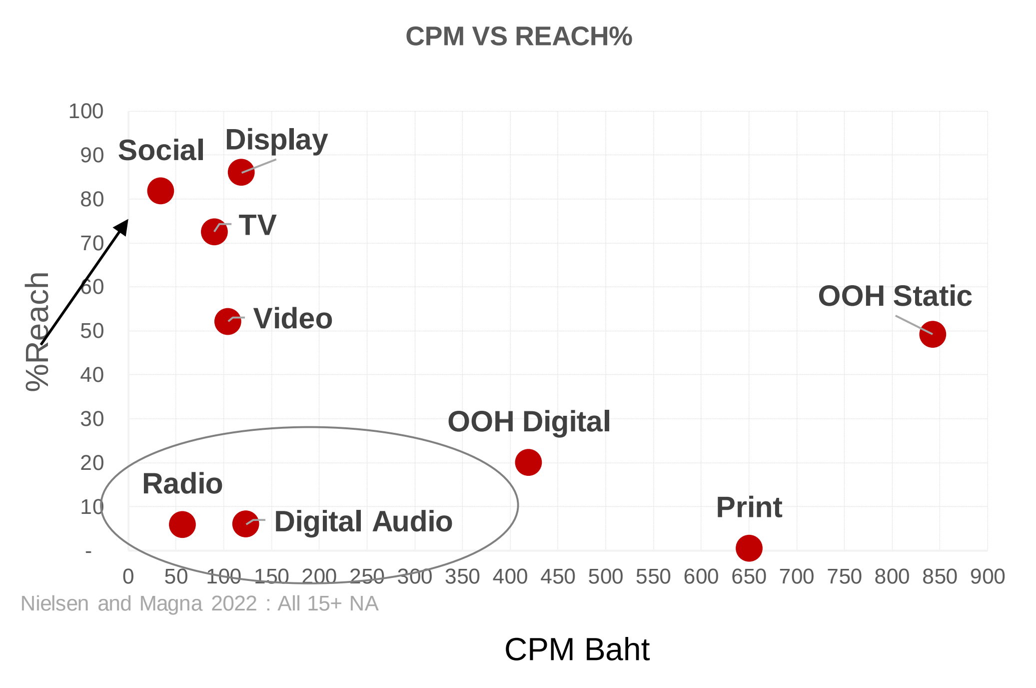
SMART TV/INTERNET TV or SET-TOP-BOX FOR DIGITAL SIGNAL or IPTV / APPLE TV / ANDROID TV or AIS PLAY BOX or DIGITAL VIDEO DISK

AGB Nielsen : Thailand CMV / %Media Consumption by Age Group

Online Audio set to surpass traditional Radio

Cost Efficient Digital Audio vs Radio

DAAT Online Audio Ad spend = 109 Mb in 2022



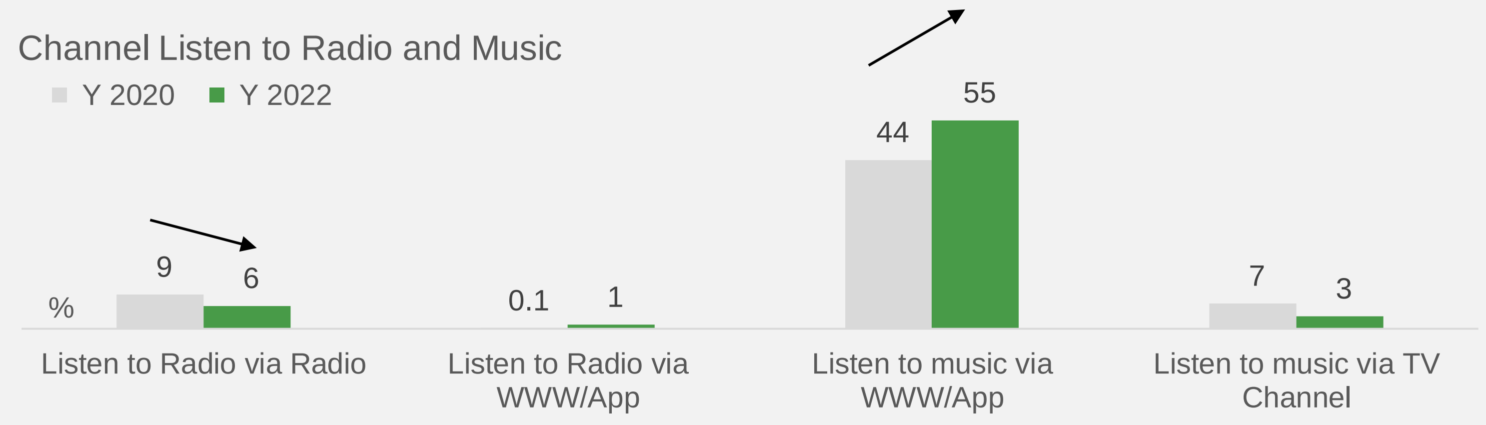
JOOX | Spotify | BEC TERO, Plern

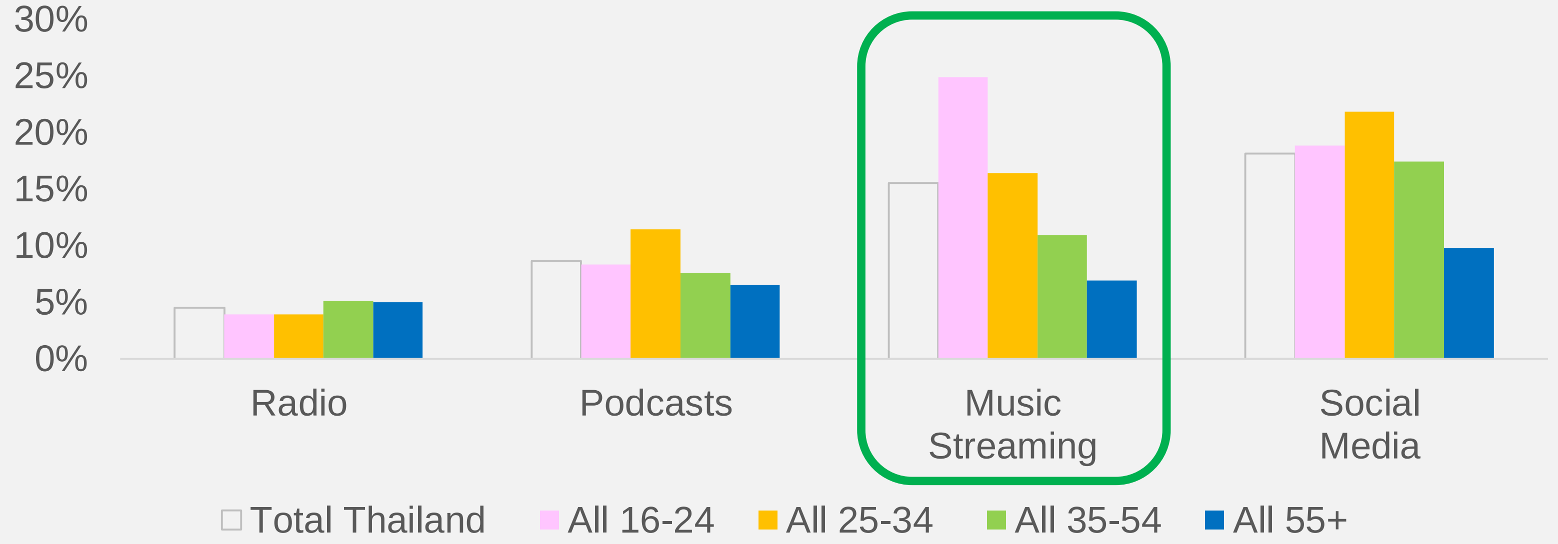
60% | **35%** | **5%**

Similarweb Daily Active Users (Jan-Aug22)

1.5Mil | 1.3Mil | N/A

Platform shifted, Teens Skew





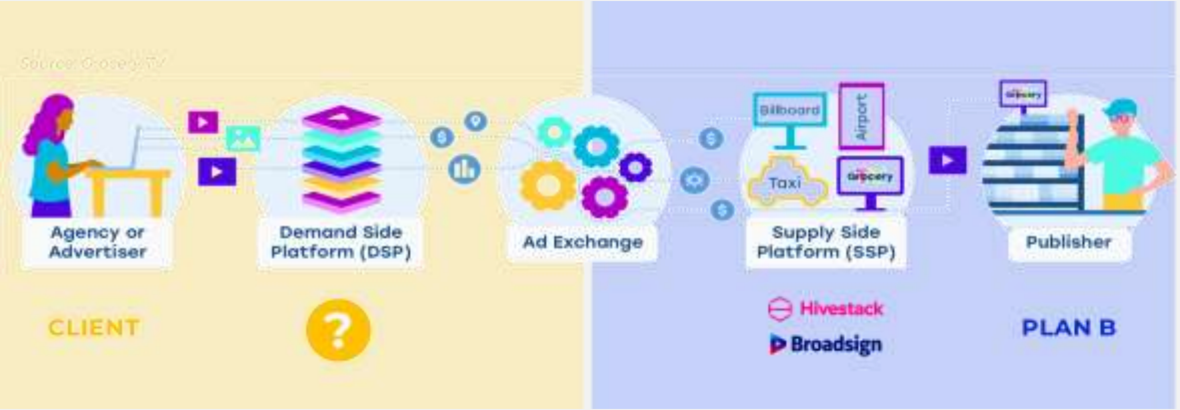
Source : GWI Q2 : Y2022 : Thailand

TTD internal data Jan – March 2021
Spotify internal Data 2018 / App Annie Feb 2020
We are social, Digital in APAC 2021 V1

Traditional Media Transformation

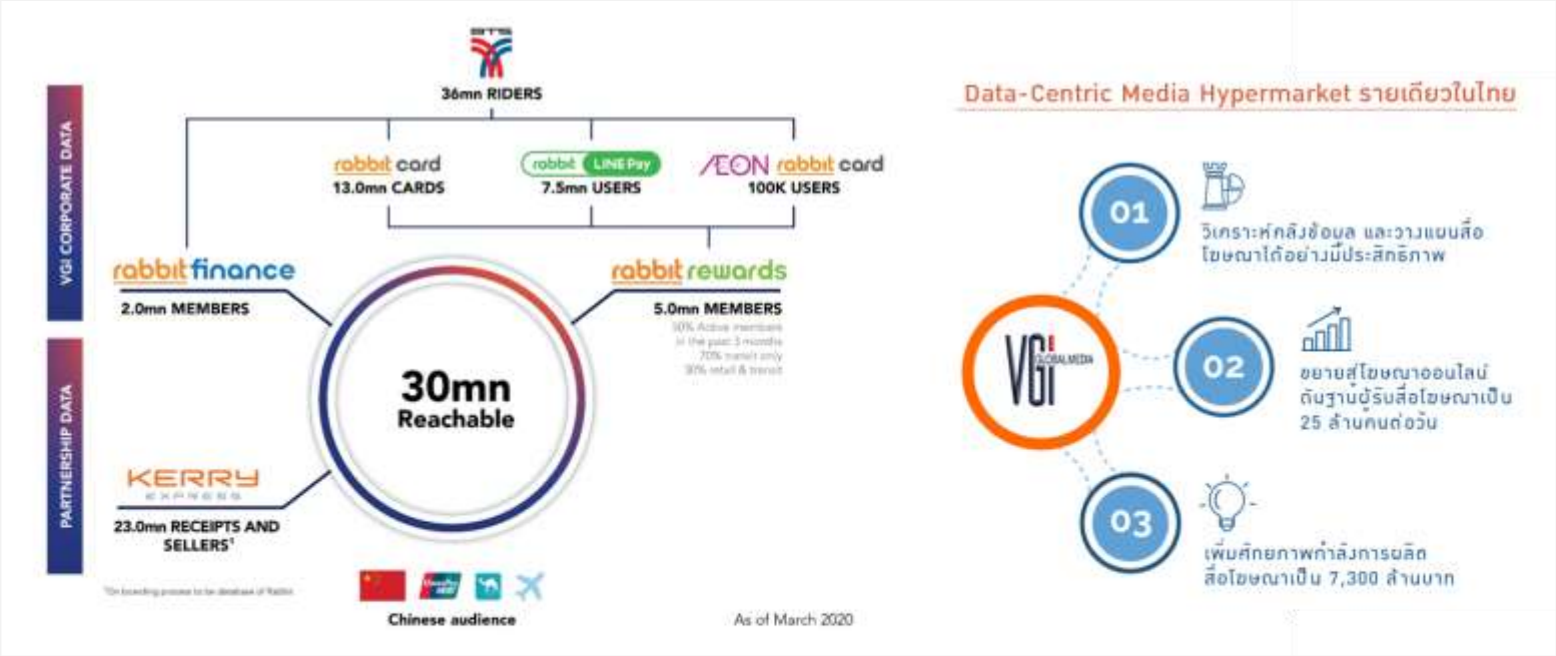
DOOH Programmatic

- Changing buying model and Buying Process
  - **<u>Buying Model</u>** : from Physical location and unit buy → Targeted Audiences buy
  - **<u>Buying Process</u>** : from Direct buy from OOH media vendors (PlanB/ VGI) → Programmatic/Online reservation buy



Business Transformation

- Build Own Platform / Collect 1P Data



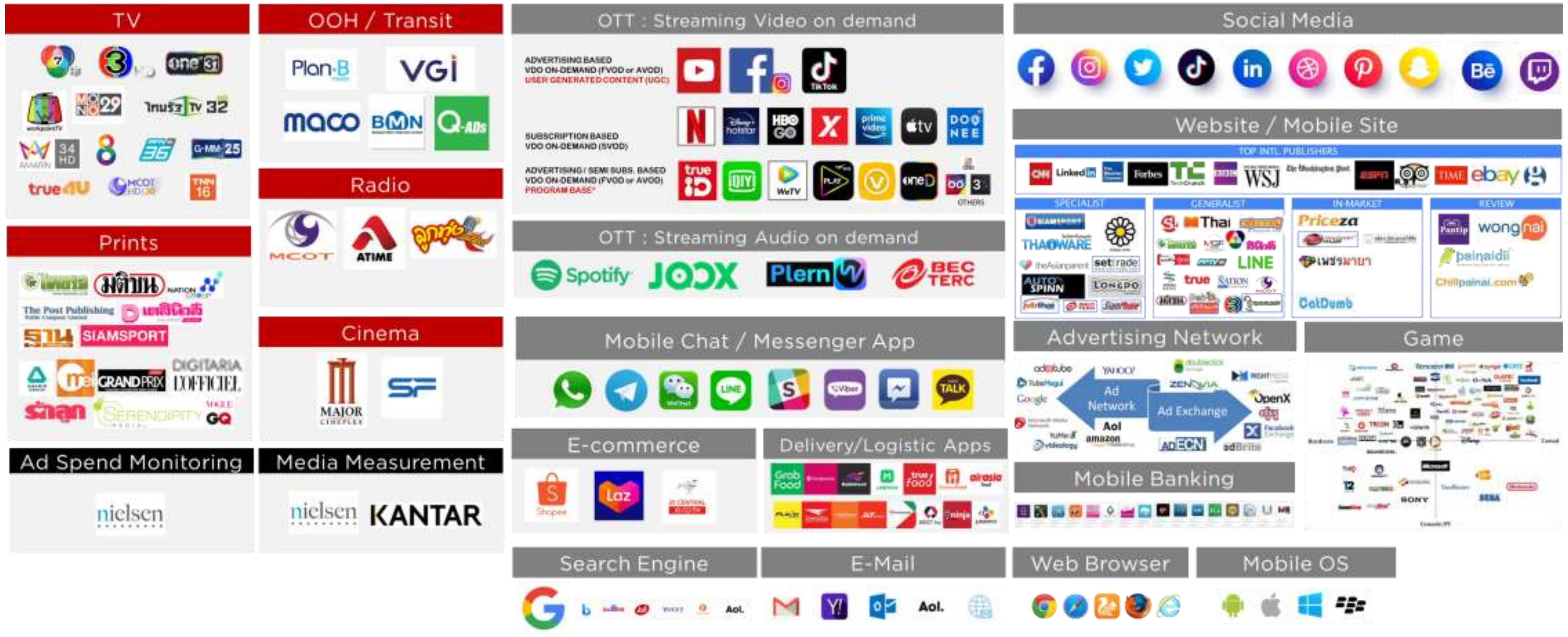
Platforms convergence across industry

Platforms are moving Up & Down the Value Chain

	Media	Advertising	E-Commerce	Payment	Logistics
Google	Google	Google Ads	Google Shopping	G Pay	Google Express
facebook		facebook Ads	Facebook Marketplace	FACEBOOK PAY	n/a
LINE	LINE	LINE Official Account / LINE Ads Platform	LINE SHOPPING / LINE MyShop	rabbit LINE Pay / LINE BK	LINE MAN
Lazada	Laz LIVE	Lazada Ads	Lazada	Lazada Wallet	LEL EXPRESS
Shopee	Shopee LIVE	Shopee My Ads	Shopee	AirPay	Shopee Xpress
KBank	n/a	n/a		KBank	n/a
SCB	n/a	n/a	Robinhood	SCB	SKOOTAR
Grab	n/a	GrabAds	Grab Food / Grab Mart	GrabPay	Grab
gojek	n/a	n/a	gofood	gopay	gojek
VGI	VGI	VGI DIGITAL LAB	FANS Fanslink / VGI	rabbit LINE Pay	KERRY EXPRESS

2022 Media and Ad Tech Landscape

MEDIA LANDSCAPE 2022



2022 ADVERTISING TECH LANDSCAPE

2022 Media Landscape

COMPETITION HAS EXPANDED

TV

OOH / Transit

Radio

Prints

Cinema

Ad Spend Monitoring

nielsen

Media Measurement

nielsen

KANTAR

OTT : Streaming Video on demand

ADVERTISING BASED
VDO ON-DEMAND (FVOD or AVOD)
USER GENERATED CONTENT (UGC)

SUBSCRIPTION BASED
VDO ON-DEMAND (SVOD)

ADVERTISING / SEMI SUBS. BASED
VDO ON-DEMAND (FVOD or AVOD)
PROGRAM BASE*

OTHERS

OTT : Streaming Audio on demand

Mobile Chat / Messenger App

E-commerce

Delivery/Logistic Apps

Social Media

Website / Mobile Site

TOP INTL. PUBLISHERS

SPECIALIST

GENERALIST

IN-MARKET

REVIEW

Advertising Network

Ad Network

Ad Exchange

Mobile Banking

Game

Hardcore

Casual

Console/PC

Search Engine

E-Mail

Web Browser

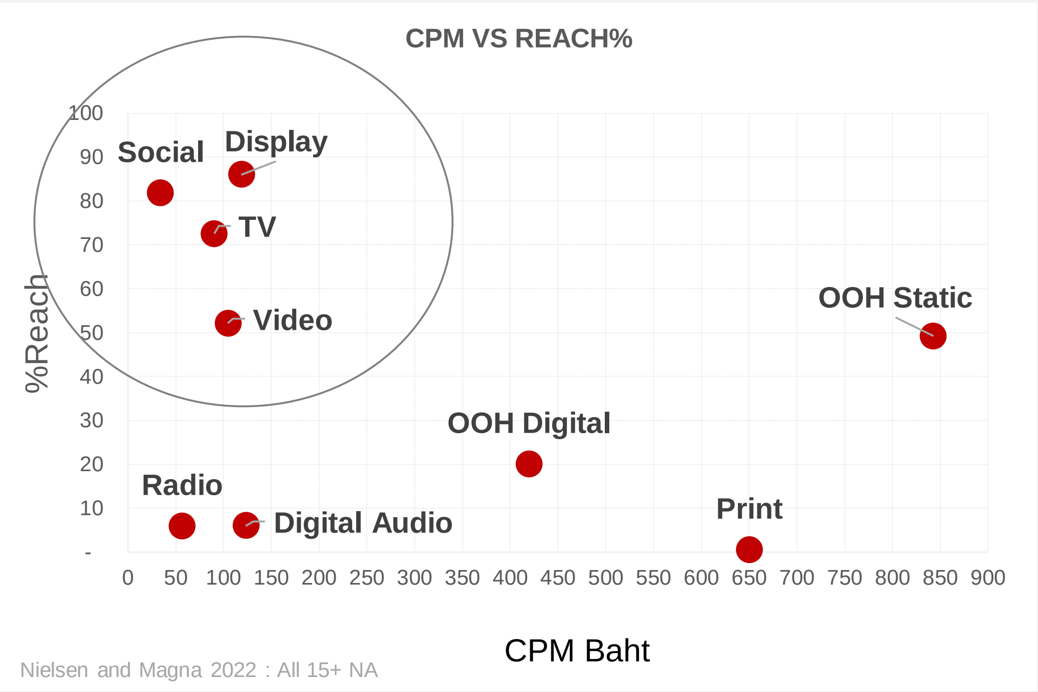
Mobile OS

Cross-Platform Ratings, the future of TV advertising?

MAAT
Media Agency Association of Thailand

TV efficiency and effectiveness has been challenged by online media

Media Efficiency



The real battlefield is here

Media Planning & Buying metrics

Campaign 9.9 TVC 30 sec : Budget 2.24 Mb / Sept 1-14, 2022 / Target : All 15+ NA

Rate Card 30 sec	240,000 x 10 Spots	
Discount	15%	
Net 30 sec	2,040,000	*10 Spots*
Universe (15+NA)	55,827,000	
Total Imp	28,564,600	*10 Spots*
Total Rating Point%	51.17	*10 Spots (Average Rating / Spot = 3.33)*
CPM 30 sec	71.4	
CPRP 30 sec	39,870	
Agency Fee	10%	
Total Gross 30 sec	2,244,000	*10 Spots*
Total TV Budget	**2,244,000**	
Total Imp	28,564,600	*จำนวนการเห็นโฆษณา 10 spots นับซ้ำ*
Total Rating% (or TARP)	51.17	*มีคนเห็นโฆษณา 10 spots คิดเป็นกี่ % ของประชากร*
Total Reach	15,000,000	*จำนวนคนที่เห็นโฆษณา 10 spots ไม่นับซ้ำ*
Total Reach%	26.87	*จำนวนคนที่เห็นโฆษณา 10 spots ไม่นับซ้ำ คิดเป็นกี่ % ของประชากร*
Average Frequency	1.90	*จำนวนโฆษณา ที่เห็นเฉลี่ย ต่อ 1 คน*
CPM 30 sec	71.4	
CPRP 30 sec	39,870	

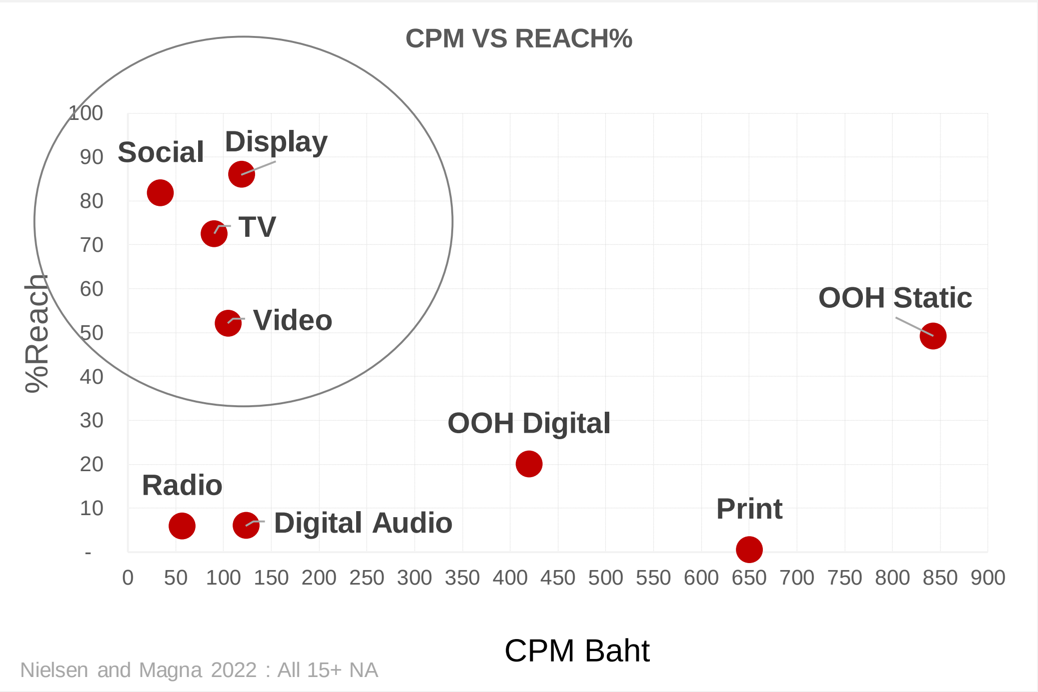
If Rating Drops

Rate Card 30 sec	240,000 x 10 Spots
Discount	15%
Net 30 sec	2,040,000
Universe (15+NA)	55,827,000
Total Imp	26,498,600
Total Rating Point%	47.47
CPM 30 sec	77.0
CPRP 30 sec	42,979
Agency Fee	10%
Total Gross 30 sec	2,244,000
Total TV Budget	**2,244,000**
Total Imp	26,498,600
Total Rating% (or TARP)	47.47
Total Reach	14,500,000
Total Reach%	25.97
Average Frequency	1.83
CPM 30 sec	77.0
CPRP 30 sec	42,979

AGB Nielsen : TAM Arianna

Industry needs robust advanced measurement to capture all potential

Media Efficiency



The real battlefield is here

TV Broadcast rating%

Live Streaming *(Device TV/PC/Mobile/Tablet)*

	Rating	CPM 30 sec	CPRP 30 sec
TV Linear (Arianna)	4.65	80.0	43,833
Cross-platform (eTAM)	4.65+0.19	76.9	42,123

Note : Net 30 sec costs = 204,000 Baht

Social 34

AGB Nielsen : TAM Arianna

Main drivers of TV advertising that are shaping its future.

1. **The ubiquity of over-the-top (OTT) media services.**

On-demand streaming services continue to exert an influence on the viewing population.

These entertainment providers are **taking over the television landscape**, churning out content and investing in their own **original programming**.

2. **Continued growth of connected device ownership**

Sales of **smart TVs**, or internet-connected televisions continue to rise.

These devices make it easier than ever for viewers to tap into their **on-demand viewing options**, including apps for YouTube, Netflix etc.

3. **The need for cross-channel measurement**

It's becoming critical to measure **beyond impressions** to drive business decisions.

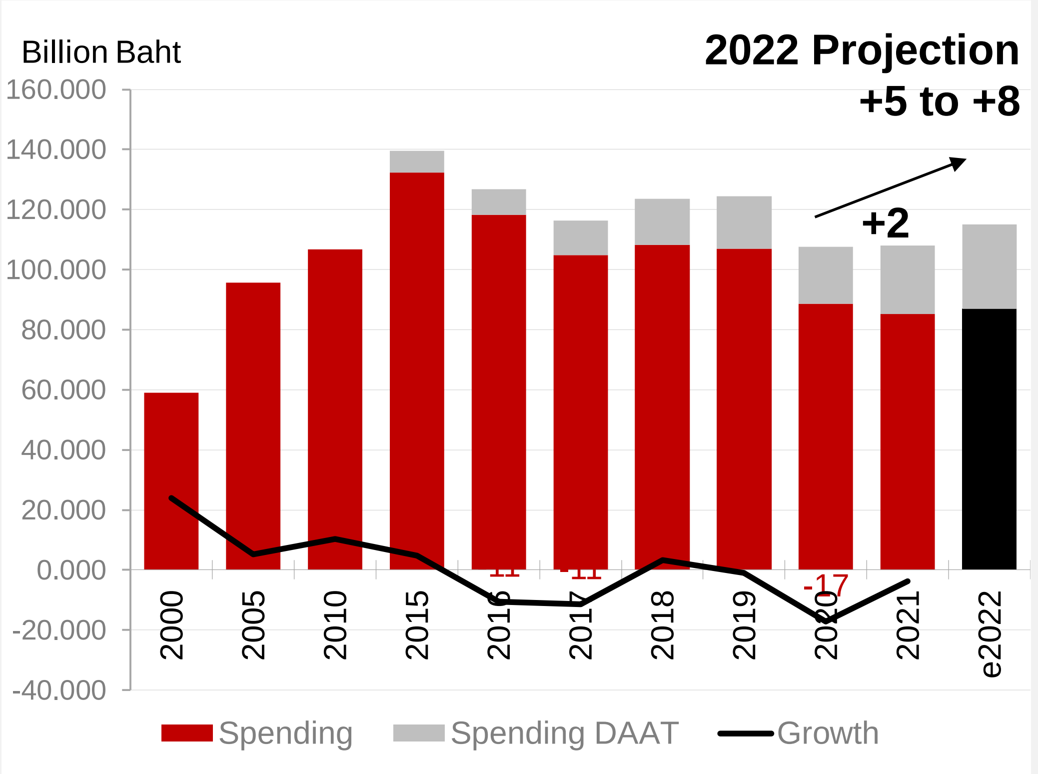
Instead, brands need to verify the **quality of engagement** in the media to ensure budgets aren't wasted.

Advertising Spending Update

Media Agency Association of Thailand

Media ad spending could recover and grow by 5-8% this year

Recovery at risk



Ad spend rebounded as the acceleration in digital adoption and ecommerce

High Adex growth across Digital & OOH media

Advertising Spend by medium (Nielsen&DAAT)	2020 Bt. M.	2020 %	2021 Bt. M.	2021 %	%	2021 Jan-Jun Bt. M.	2021 Jan-Jun %	2022 Jan-Jun Bt. M.	2022 Jan-Jun %	%
TV	61,318	57%	63,112	58%	3%	31,647	59%	30,607	54%	-3%
Radio	3,539	3%	3,421	3%	-3%	1,688	3%	1,588	3%	-6%
Newspapers	4,516	4%	3,537	3%	-22%	1,341	2%	1,232	2%	-8%
Magazines	803	0.8%	694	0.6%	-14%	333	0.6%	304	0.5%	-9%
Cinema	4,198	4%	3,398	3%	-19%	1,958	4%	3,739	7%	91%
Outdoor	5,842	5%	6,042	6%	3%	3,363	6%	3,724	7%	11%
Transit	4,726	4%	3,594	3%	-24%	2,012	4%	2,800	5%	39%
In-Store	650	0.6%	672	0.6%	3%	366	0.7%	450	0.8%	23%
Online (DAAT)	21,059	20%	24,766	23%	18%	11,094	21%	12,212	22%	10%
Total	106,651	100%	109,236	100%	2%	53,802	100%	56,655	100%	5%

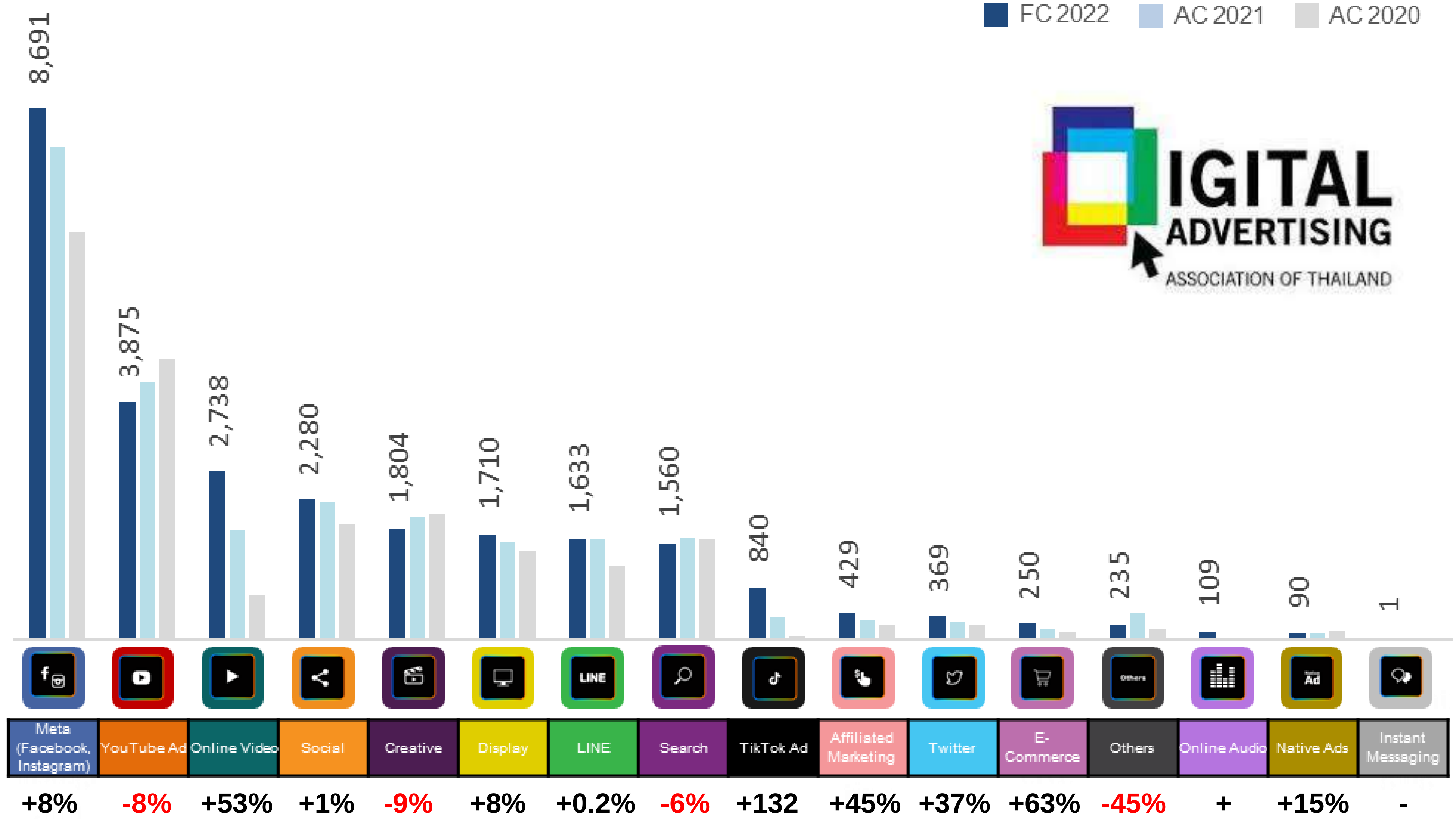
- **<u>Cinema</u>** 98% of ad spend reported increase from existing list of movie theatres both in bkk and UPC.
- **<u>Outdoor and transit</u>** : ad spend increased in bkk +12% and upc +29%. Plan B +50%

AGB Nielsen : Thailand CMV / %Media Consumption by Age Group

MAAT Media Agency Association of Thailand

Meta and YouTube remains the leader, Online Video witnessed high growth +53%.

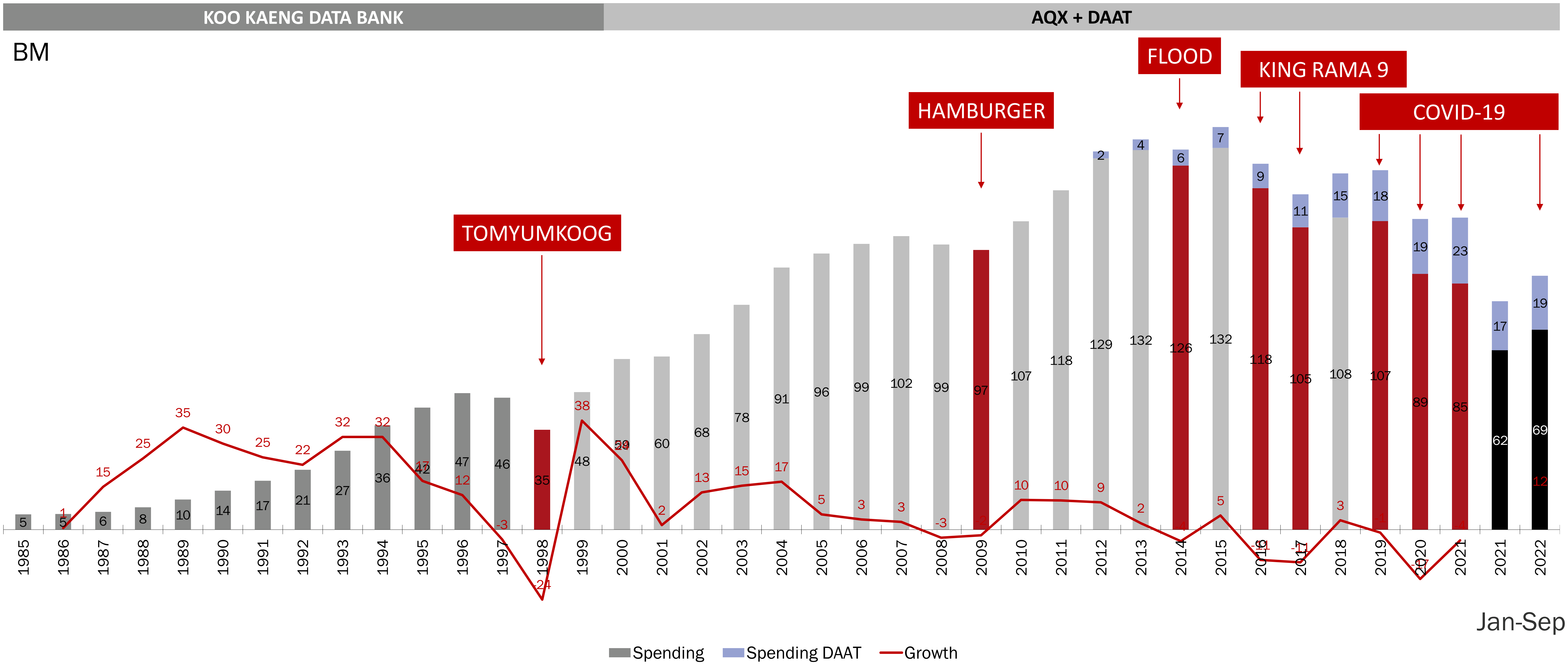
Unit in Million Baht



- **Meta** continues to be the leader in 2022, followed by **YouTube**.
- **Online Video** has grown continuously and outranked **Social**, standing at #3 in 2022.
- **E-Commerce**, and especially **TikTok**, show impressive growth since 2020, with the rates of +45% & +64% and +654% & +132% for the respective discipline.
- Slight decline is witnessed in 2022 for **YouTube**, **Creative**, and **Search**.

AGB Nielsen : Thailand CMV / %Media Consumption by Age Group

INDUSTRY MEDIA SPENDING



Source: AQX, Intensive Watch
Cab/Sat spending: Intensive Watch data from Jan 2011-Dec 2012; Ariana data from Jan 2013 onwards
Growth in 2011 is based on the same parameter that does not include CabSat

MEDIABRANDS

Ad spend recovered unevenly across category

COVID19 relaxation drive growth unevenly across categories

2022 Jan-Jun

	ADEX TOP RANK CATEGORY	Jan-Jun21	Jan-Jun22	%
1	NON-ALCOHOLIC BEVERAGES	4,237	4,390	4%
2	RETAIL STORES exc Direct Sales ✓	2,387	2,546	7%
3	MOTOR VEHICLES	2,395	2,384	-0.5%
4	SKIN-CARE PREPARATIONS	2,506	2,255	-10%
5	GOVERNMENT	1,229	1,940	58%
6	ORAL PRODUCTS	1,595	1,884	18%
7	DAIRY PRODUCTS	1,757	1,837	5%
8	VITAMINS & SUPPLEMENTARY	1,806	1,718	-5%
9	TOILETRIES	1,647	1,622	-2%
10	HOUSEHOLD CLEANERS	1,961	1,620	-17%
11	COMMUNICATIONS	1,912	1,537	-20%
12	HAIR PREPARATIONS	2,065	1,500	-27%
13	FOODSTUFFS	1,173	1,197	2%
14	WEBSITES & APPLICATIONS ✓	920	1,129	23%
15	PHARMACEUTICALS	959	1,045	9%
16	ELECTRICAL NON-AUDIO/VISUAL	1,016	879	-13%
17	SEASONING PRODUCTS	761	855	12%
18	SNACK FOODS	789	839	6%
19	BANKS ✓	589	770	31%
20	INSURANCE	786	615	-22%
	TOP 10	21,521	22,196	3.1%
	TOP 20	32,490	32,562	0.2%

Post COVID growing categories are

DIGITAL LIFESTYLE
- Pay TV/OTT +258%
- TV +126%
- E-marketplace +36%

OUT-OF-HOME ENJOYMENT
- Restaurants +58%
- Trade/Fair +184%
- Travel & Tours +30%

FINANCIAL SECURITY
- 2nd Hand Car App +1127%
- Commercial Loans +1069%
- Auto Leasing +64%

Only brand leaders enjoy the growth

TOP 1-10 BRANDS

		J-J'21	J-J'22	
Lazada	1.	493	647	+31%
Tepthai	2.	493	619	+26%
Shopee	3.	360	615	+71%
Prime Mins	4.	156	597	+283%
Isuzu	5.	657	526	-20%
Coke	6.	203	496	+144%
GSB	7.	211	389	+84
Colgate	8.	306	341	+11%
Carrier	9.	245	296	+21%
Lay's	10.	207	291	+41%

TOP 11-20 BRANDS

		J-J'21	J-J'22	
Regency	11.	285	287	+1%
Nescafe 3in1	12.	320	281	-21%
OK Herbal	13.	169	276	+63%
Foremost	14.	108	239	+121%
Toyota	15.	242	236	-2%
Pepsi	16.	241	234	-3%
Samsung Mobile	17.	277	213	-23%
Sunsilk	18.	160	200	+25%
Wall's	19.	81	200	+146%
Cars 24	20.	0	196	+196193900%

Launch of new brands & new variants also contributed to Adex growth

New Entry

New variants

SOURCE: AQX (All categories excluded Direct sales, CD/DVD (Musical & Film Products), Transportation, Classified and House Ads.

Some category has shifted Adex across from traditional media to digital

NIELSEN TOP CATEGORY : ALL MEDIA

	ADEX TOP RANK CATEGORY	Jan-Jun21	Jan-Jun22	%
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8	VITAMINS & SUPPLEMENTARY	1,806	1,718	-5%
9	TOILETRIES	1,647	1,622	-2%
10	HOUSEHOLD CLEANERS	1,961	1,620	-17%
11	COMMUNICATIONS	1,912	1,537	-20%
12	HAIR PREPARATIONS	2,065	1,500	-27%
13	FOODSTUFFS	1,173	1,197	2%
14	WEBSITES & APPLICATIONS	920	1,129	23%
15	PHARMACEUTICALS	959	1,045	9%
16	ELECTRICAL NON-AUDIO/VISUAL	1,016	879	-13%
17	SEASONING PRODUCTS	761	855	12%
18	SNACK FOODS	789	839	6%
19	BANKS	589	770	31%
20	INSURANCE	786	615	-22%
	TOP 10	21,521	22,196	3.1%
	TOP 20	32,490	32,562	0.2%

DAAT : TOP CATEGORY ONLINE MEDIA

OFFLINE Adex	ONLINE Adex
▼	▲
▲	▼
▼	▼
▼	▲
▲	▲
▲	▲
▲	▲
▼	▲
▼	▲
▲	▲

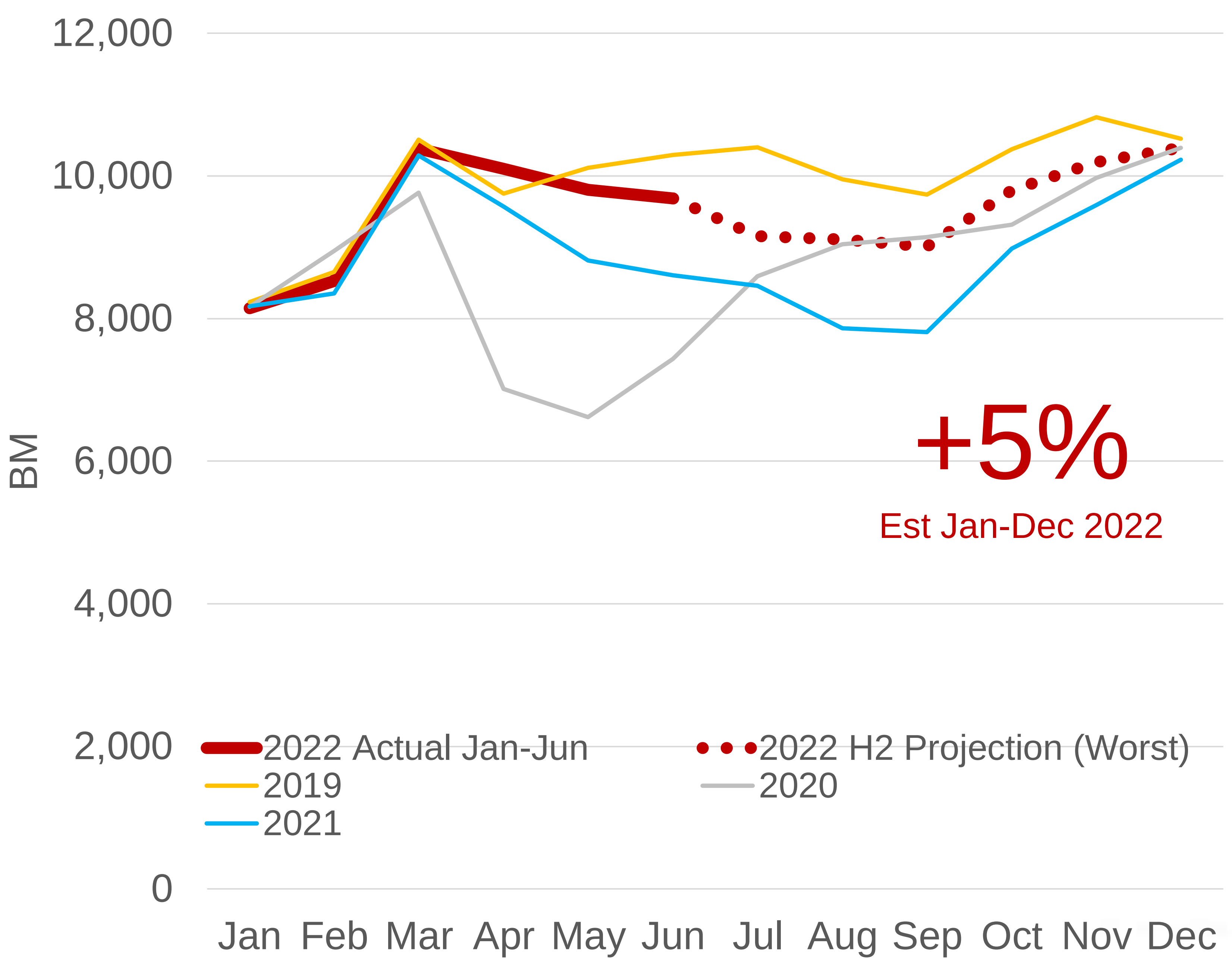
Industry needs robust ads monitoring to capture all spending activities

If inflation continue to rise higher in H2

NEGATIVE FACTORS

- **INFLATION** rate and production costs continue to rise.
- **HOUSEHOLD DEBT** now exceeds 90% of Thai gross domestic product (GDP).
- Weakening consumer purchasing power, household will have to reduce their consumption to pay off their debts, which will slow economic growth.
- The rising cost of production may impact some advertisers to lower down or postpone the spend to assess the situation

Tradingeconomics.com / Bureau of Trade and Economic Indices, Thailand / (2019 = Index 100)



WORST Scenario

Among the potential opportunities in H2 2022, **WHAT-IF inflation** and costs of production continue to **rise higher?**

SOURCE: AQX (All categories excluded Direct sales, CD/DVD (Musical & Film Products), Transportation, Classified & House Ads. Excluded Nielsen Online Spend and replacing with DAAT spending spend excluding Creative production

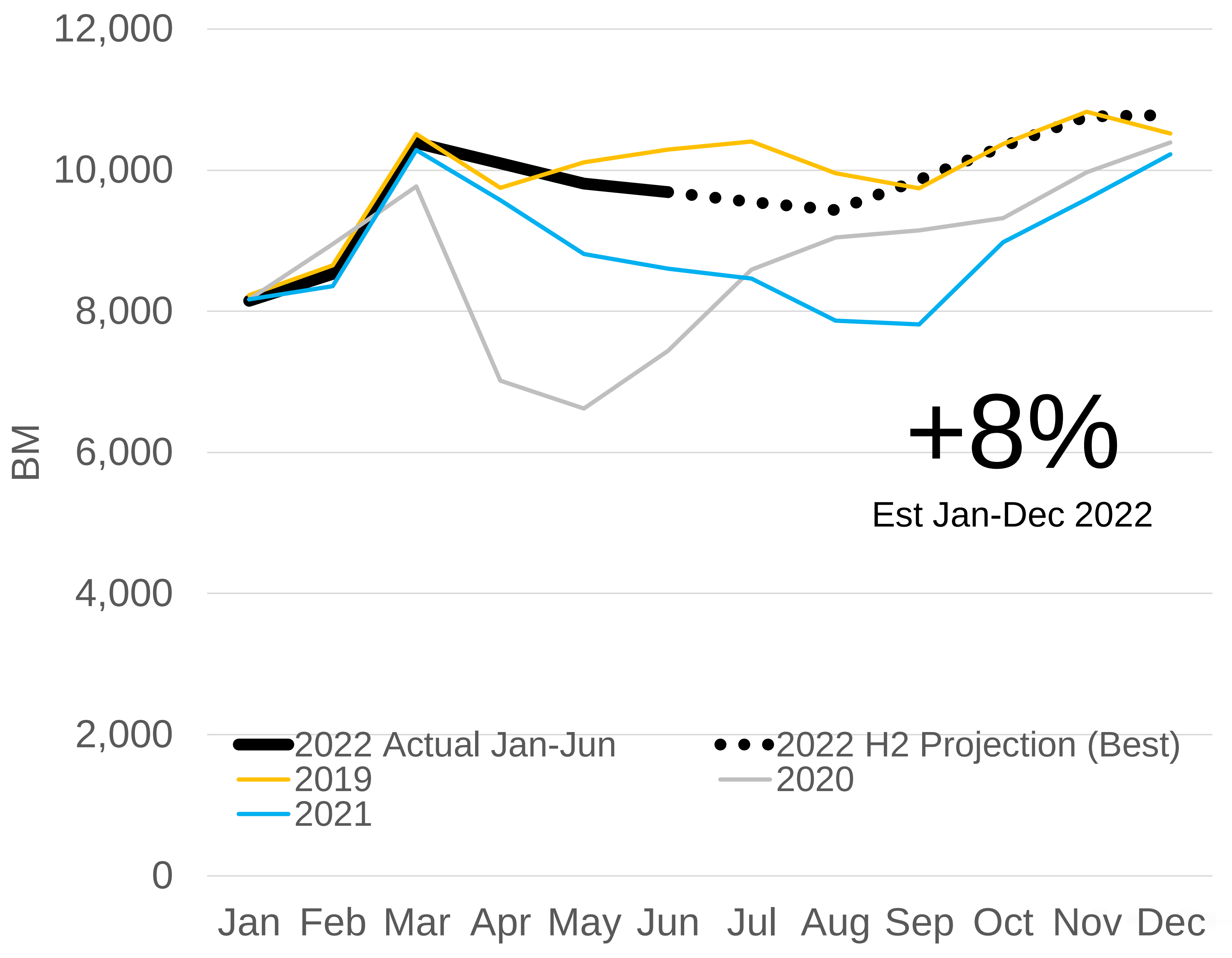
If the recovery continue in wider categories

POSITIVE FACTORS

- The softening Baht currently in short-term will be drive growth in export value. Growth expect to be continued in **AGRICULTURE** and **FOODS**.
- The higher inflation and decreased consumer's purchasing power. Potential growth categories are **LOAN**, **LEASING** and **USED CAR/HOUSE MARKETPLACE**.
- Rising global awareness of Green energy and zero carbon will drive growth in **ALTERNATIVE ENERGY, EV CAR, CSR** campaigns.
- Health-conscious trend continue, **HEALTH AND MEDICAL SERVICES** expect to grow from both domestic and in-bound demand.
- Business and mobility rate resume close to normal. **RETAIL, ENTERTAINMENT, EVENT FAIRS** and exhibition continue to recover.
- In-bound and domestic **TOURISM AND HOSPITALITY** will continue to grow. "Thai Tiew Thai Phase 4" will also stimulate short-term domestic consumption.
- Digital disruption related categories will continue to grow such as **E-COMMERCE, SUPER APPLICATION, OTT, FINANCIAL APPLICATION**.

BEST Scenario

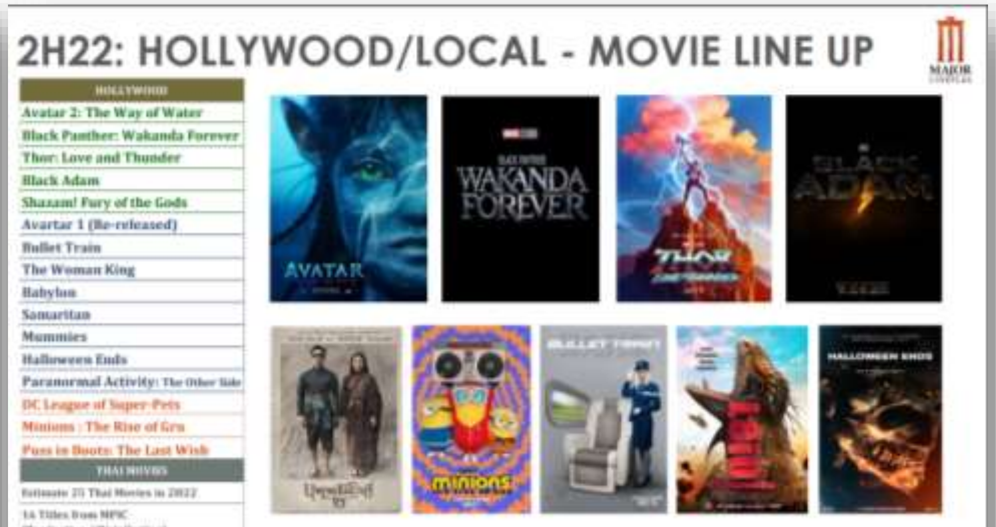
Among the potential opportunities in H2 2022, **WHAT-IF the inflation drop** and the **recovery** continue in **wider categories**



Digital and OOH will continue to earn double digit growth

2022 Full Year Projection

Advertising Spend by medium (Nielsen&DAAT)	2021 Jan-Jun Bt. M.	2021 Jan-Jun %	2022 Jan-Jun Bt. M.	2022 Jan-Jun %	%	2022 Jan-Dec Bt. M. (+5%)	2022 Jan-Dec % (+5%)	% (+5%)	2022 Jan-Dec Bt. M. (+8%)	2022 Jan-Dec % (+8%)	% (+8%)
TV	31,647	59%	30,607	54%	-3%	62,000	54%	-2%	63,500	55%	1% ✓
Radio	1,688	3%	1,588	3%	-6%	3,000	3%	-12%	3,000	3%	-12%
Newspapers	1,341	2%	1,232	2%	-8%	2,500	2%	-29%	2,500	2%	-29%
Magazines	333	0.6%	304	0.5%	-9%	500	0.4%	-28%	500	0.4%	-28%
Cinema	1,958	4%	3,739	7%	91%	5,500	5%	62% ✓	5,800	5%	71% ✓
Outdoor	3,363	6%	3,724	7%	11%	7,000	6%	16%	7,000	6%	16% ✓
Transit	2,012	4%	2,800	5%	39%	5,000	4%	39% ✓	5,500	5%	53% ✓
In-Store	366	0.7%	450	0.8%	23%	1,000	0.9%	49% ✓	1,200	1.0%	79% ✓
Online (DAAT)	11,094	21%	12,212	22%	10%	28,000	24%	13% ✓	29,000	25%	17% ✓
Total	53,802	100%	56,655	100%	5%	114,500	100%	5%	118,000	100%	8%



36 additional screens in year 2022 in expansion plan

All 12+ NA	Q2'21	Q3'21	Q4'21	Q1'22	Q2'22
TV	92.4	91.0	89.1	88.0	86.4
Radio	5.6	5.7	4.5	4.7	5.0
Newspaper All	1.0	0.9	0.7	0.6	0.5
Magazine All	0.2	0.1	0.1	0.1	0.1
Cinema	0.2	0.3	0.2	0.2	0.3
Outdoor	59.2	60.8	62.2	60.5	55.2
Transit	18.8	18.9	17.8	17.7	17.9
In-store	13.3	14.4	13.4	14.9	17.4
Online	77.2	79.3	81.7	83.9	85.0

Source : NMR Media Consumption

- **Online media consumption continue to accelerate**
- **Positive trend across Out-of-home media**
- **<u>TV campaign from new market entry brand and nationwide festive campaign in Q4</u>**

SOURCE: AQX (All categories excluded Direct sales, CD/DVD (Musical & Film Products), Transportation, Classified and House Ads.

A more likely scene of Media Landscape

Media Mix Investigation

- Achieving 100% accuracy of Ad expenditure is literally impossible. The difference between actual and monitored varied from brand to brand depending on media mix, brand size, negotiation power and relationship with media owners.

- MAAT tries to establish how accurate the published figures are via **three methods**

  1. Comparing Nielsen monitored Adex with Ad Revenue reported in **Annual report** of media owners and **Financial Statement acquired through the Department of Business Development (DBD)** (กรมพัฒนาธุรกิจการค้า กระทรวงพาณิชย์). This method is applied for TV, Outdoor, Transit, In-store and Cinema Adex validation.

  2. Comparing Nielsen's reported media **Rate Card** with media **Agency Rate With %Discount**. This method is applied for Newspaper, Magazine and Radio Adex validation.

  3. Replacing Nielsen's Online monitored Adex with an **Online Ad Revenue Of Foreign Online Platform Provider** reported from **The Revenue Department** (กรมสรรพากร) and **DAAT Online Ad report**

- MAAT tried to cover as much media owners as possible but cannot cover 100% because our members do not buy from all. Roughly overall 60% is covered to represent majority. After that MAAT calculated the percentage difference between Nielsen from Actual Financial reports then the %different are translated into "% Discount Rate". Industry could apply it on Nielsen Monitored Adex figures to see the real picture of media spending landscape.

1) Nielsen Adex report vs Financial Revenue

TV *Media (Jan-Dec 2021, Bt m)*	Financial Ad Revenue	Nielsen Adex	%Deduction from Nielsen Adex
TV Total Vendors	**23,887**	**63,661**	-
CHANNEL 3*	4,834	15,591	69%
MONO29*	1,479	10,629	86%
ONE*	3,000	8,834	66%
CHANNEL 7**	8,078	8,189	1%
WORKPOINT*	2,075	4,993	58%
THAIRATH TV**	1,848	2,640	30%
CH 8*	755	2,269	67%
CHANNEL 9*	475	1,559	70%
AMARIN TV*	1,342	1,510	11%
Others		7,447	
Total Checked Vendors *% from total vendors*	**23,887**	**56,213** *88%*	**58%**

*Media Vendor's Financial Report
**Total Revenue from DBD (Department of business development)

Outdoor *Media (Jan-Dec 2021, Bt m)*	Financial Ad Revenue	Nielsen Adex	%Deduction from Nielsen Adex
Outdoor Total Vendors	**2,738**	**6,090**	-
PLAN B*	2,638	4,858	46%
VGI*	100	264	62%
BMN**		3	100%
Others		964	
Total Checked Vendors *% from total vendors*	**2,738**	**5,125** *84%*	**47%**

Transit	Financial Ad Revenue	Nielsen Adex	%Deduction from Nielsen Adex
Transit Total Vendors	**2,083**	**3,617**	-
PLAN B*	274	245	-12%
VGI*	1,480	1,846	20%
BMN**	329	942	65%
Others		583	
Total Checked Vendors *% from total vendors*	**2,083**	**3,033** *84%*	**31%**

In-Store *Media (Jan-Dec 2021, Bt m)*	Financial Ad Revenue	Nielsen Adex	%Deduction from Nielsen Adex
In-Store Total Vendors	**375**	**665**	-
PLAN B*	375	458	18%
Others		207	
Total Checked Vendors *% from total vendors*	**375**	**458** *69%*	**18%**

Cinema	Financial Ad Revenue	Nielsen Adex	%Deduction from Nielsen Adex
Cinema Total Vendors	**190**	**3,555**	-
MAJOR*	190	2,408	92%
Others		1,155	
Total Checked Vendors *% from total vendors*	**190**	**2,401** *68%*	**92%**

Industry could apply “%Discount or %Deduction rate” on Nielsen Monitored Adex figures to see the real picture of media spending landscape.

2) Nielsen rate card vs Agency discount rate

Radio *Media (Jan-Dec 2021, Bt m)*	Adex With Agency Rate	Nielsen Adex	%Deduction from Nielsen Adex*
Radio Total Vendors	**2,596**	**3,266**	-
FM.93.0 (SOR TOR ROR)	219	299	27%
FM.94.5 (JOR SOR)	213	295	28%
FM.106.5 (1 POR NOR)	113	253	55%
FM.90.0 (POL 1)	81	168	52%
FM.94.0 (TOR TOR BOR)	93	144	36%
FM.97.0 (SOR VOR TOR)	84	138	39%
FM.100.0 (JOR SOR)	91	136	33%
FM.105.5 (OR SOR MOR TOR(TV3))	68	131	48%
FM.90.5 (VOR POR TOR)	99	116	14%
FM.95.0 (TOR TOR TOR)	81	111	28%
FM.103.5 (TOR TOR BOR (TV7))	88	109	20%
Others	1,366	1,366	
Total Checked Vendors *% from total vendors*	**1,230**	**1,900** *58%*	**35%**

**%Deduction from Nielsen Adex = an agency discount rate against Nielsen Adex Rate Card per commercial spot buy*

Newspaper *Media (Jan-Dec 2021, Bt m)*	Adex With Agency Rate	Nielsen Adex	%Deduction from Nielsen Adex*
Newspaper Total Vendors	**1,824**	**3,560**	-
STAR'S SOCCER DAILY	268	383	30%
KRUNGTHEP TURAKIJ	295	348	15%
BANGKOK POST	249	311	20%
SIAM KEE-LA	189	271	30%
SPORT POOL	189	270	30%
NAEW NAH	174	249	30%
THAI RATH	187	234	20%
MA-TI-CHON DAILY	140	224	38%
DAILY NEWS	132	174	24%
Others		1,097	
Total Checked Vendors *% from total vendors*	**1,824,306**	**2,463** *69%*	**26%**

**%Deduction from Nielsen Adex = an agency discount rate against Nielsen Adex Rate Card of the same ad space e.g. 12Col x 10" and 12Col x 20".*
Sport Pool and Star's Soccer Daily were compared at 8Col x 14" and 8Col x 7"

Magazine *Media (Jan-Dec 2021, Bt m)*	Adex With Agency Rate	Nielsen Adex	%Deduction from Nielsen Adex*
Magazine Total Vendors	**645**	**708**	-
MA-TI-CHON SUD SUBDHA	38	48	20%
VOGUE (THAILAND)	40	48	15%
ELLE	36	42	15%
L'OFFICIEL(THAILAND)	33	39	15%
HARPER'S BAZAAR	25	29	15%
KARN-NGERN THANAKARN	22	28	20%
CHEE VA JIT	20	25	20%
BAHN LAE SUAN	19	24	20%
WHAT HI-FI	19	23	15%
FORBES THAILAND	19	22	15%
L'OFFICIEL HOMMES	18	21	15%
PRAEW (MONTHLY)	17	21	20%
Others	338	338	
Total Checked Vendors *% from total vendors*	**307**	**370** *52%*	**17%**

**%Deduction from Nielsen Adex = an agency discount rate against Nielsen Adex Rate Card of the same ad position e.g. Inside Full Page, Inside Back Cover and Back Cover page*

Industry could apply "%Discount or %Deduction rate" on Nielsen Monitored Adex figures to see the real picture of media spending landscape.

MAAT
Media Agency Association of Thailand

3) Apply Online Ad Revenue of Foreign Online Platform from The Revenue Dept.

4,055 Mb
Nielsen Online Adex Jan-Jun 2022

12,212 Mb
DAAT Online Adex Est Jan-Jun 2022

DAAT spending spend excluding Creative production

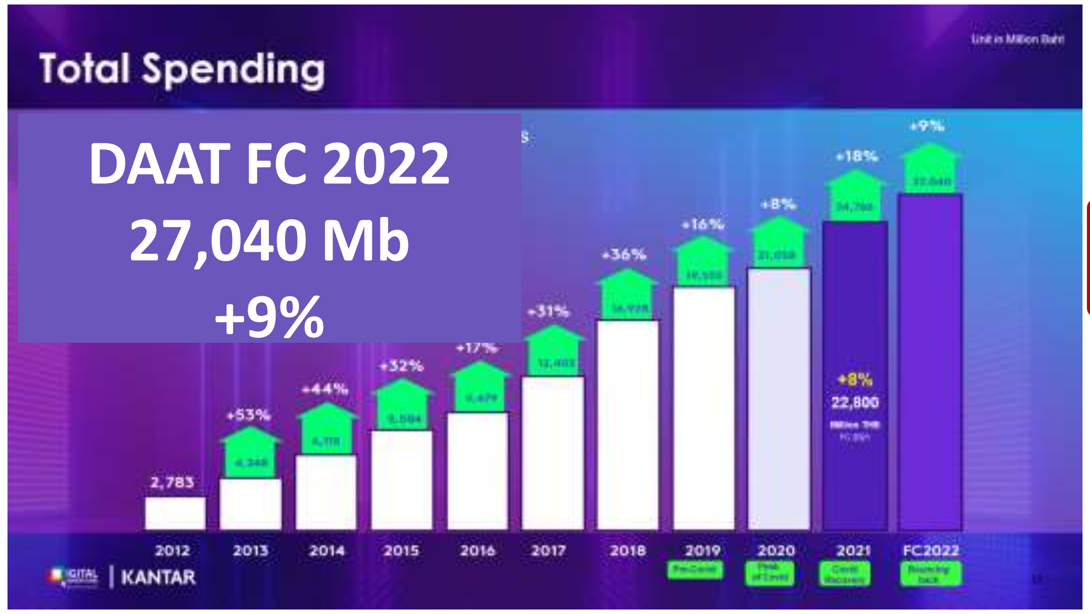
38,422 Mb
The Revenue Sept Online Revenue Est Jan-Jun 2022

NIELSEN

Advertising Spend by medium (Nielsen&DAAT)	2021 Bt. M.	2021 Jan-Jun Bt. M.	2022 Jan-Jun Bt. M.
TV	63,112	28,802	28,745
Radio	3,421	1,536	1,491
Newspapers	3,537	1,221	1,157
Magazines	694	303	285
Cinema	3,398	1,782	3,511
Outdoor	6,042	3,061	3,497
Transit	3,594	1,831	2,630
In-Store	672	333	422
Online (Nielsen)	7,996	4,307	4,055

SOURCE: AQX (All categories excluded Direct sales, CD/DVD (Musical & Film Products), Transportation, Classified and House Ads.

DAAT



SOURCE: DAAT Online Ad Spending 2022

กรมสรรพากร THE REVENUE DEPARTMENT

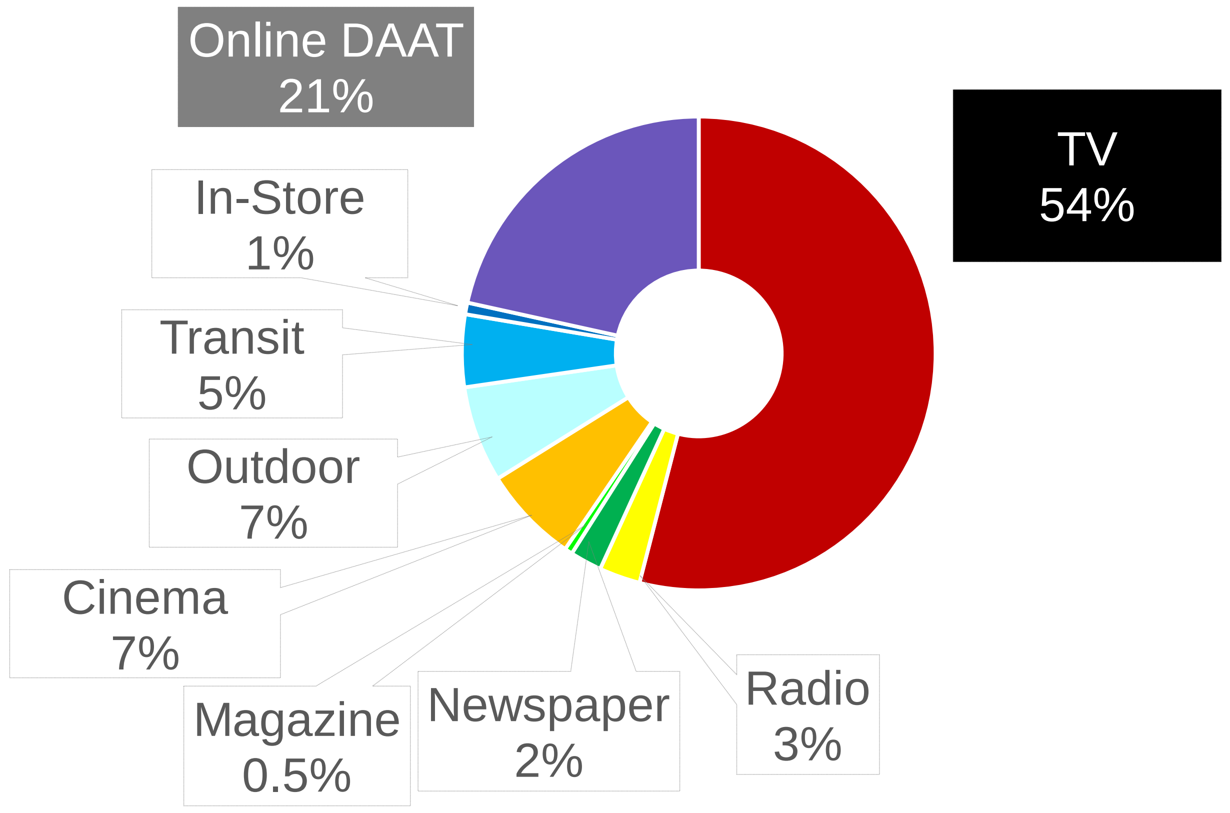
REVENUE OF FOREIGN ELECTRONIC SERVICE IN THAILAND

Type of platform	Total Electronic service Value (Mb) Oct'21-Mar'22	Estimated Value 12 months
Online advertising services บริการโฆษณาออนไลน์	38,422	76,843
E-commerce บริการขายสินค้าออนไลน์	15,904	[redacted]
Subscription online music, films, and games บริการสมาชิก เพลง หนัง เกมส์ ฯลฯ	5,719	[redacted]
Intermediary platform services e.g, transport services (Peer to Peer) บริการแพลตฟอร์มที่เป็นตัวกลาง	529	[redacted]
Hotel/Travel e-booking บริการแพลตฟอร์มจองที่พัก ตั๋วเดินทาง ฯลฯ	302	[redacted]
Total	60,875	[redacted]

Source : https://eservice.rd.go.th (As of 25 April 2022)

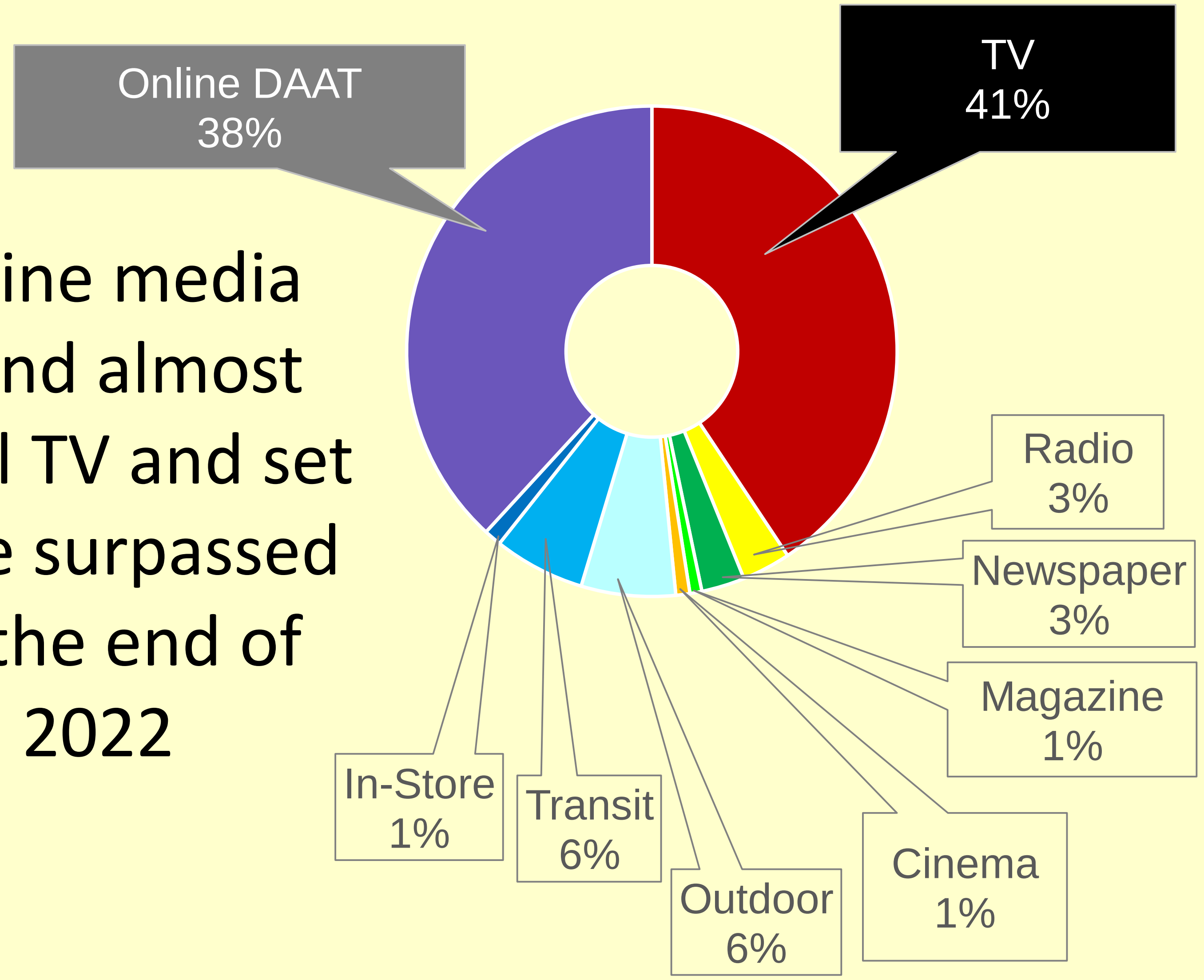
Changing media outlook with a realistic Adex + DAAT

Jan-Jun 2022 (Nielsen+DAAT)



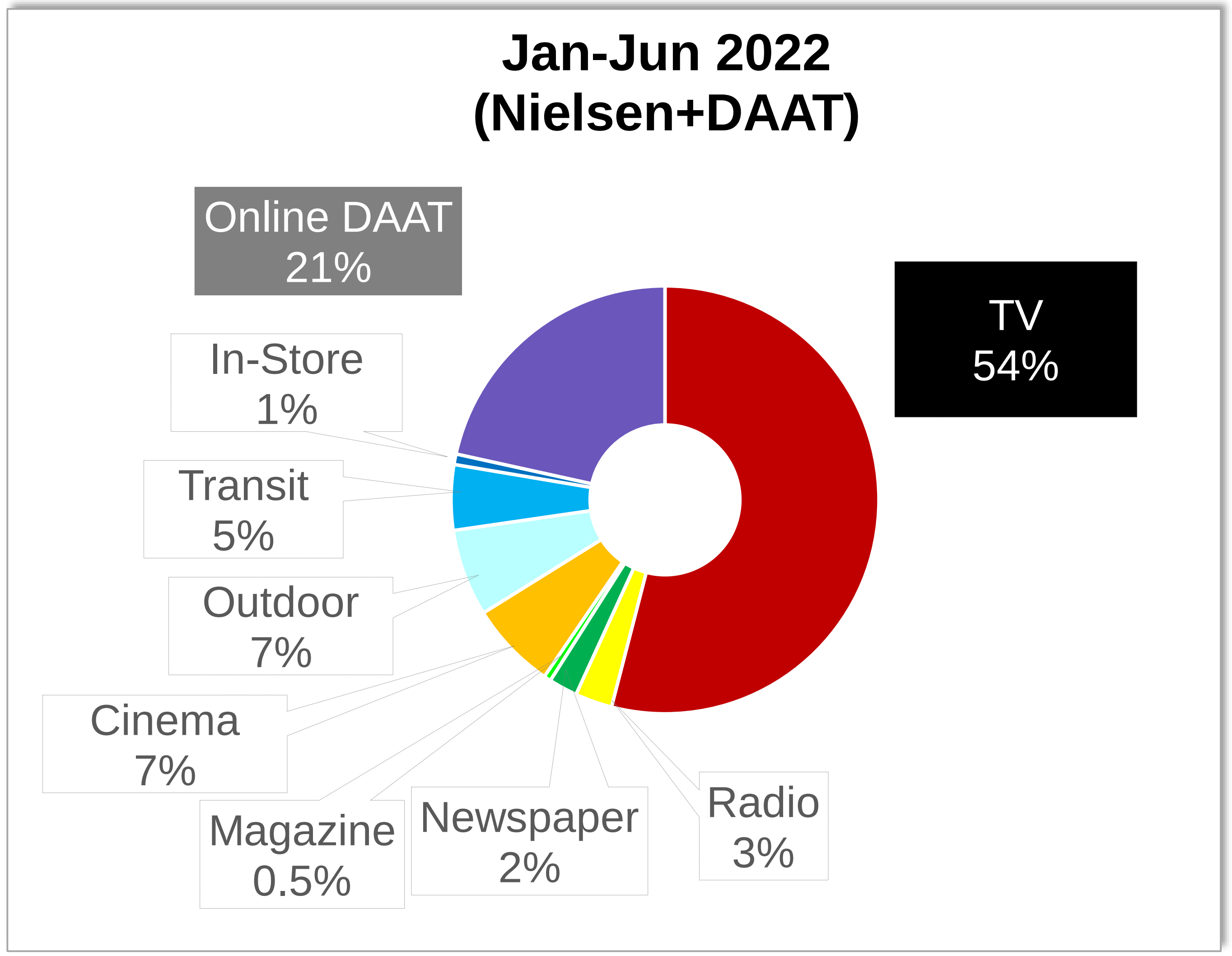
Realized Adex + DAAT

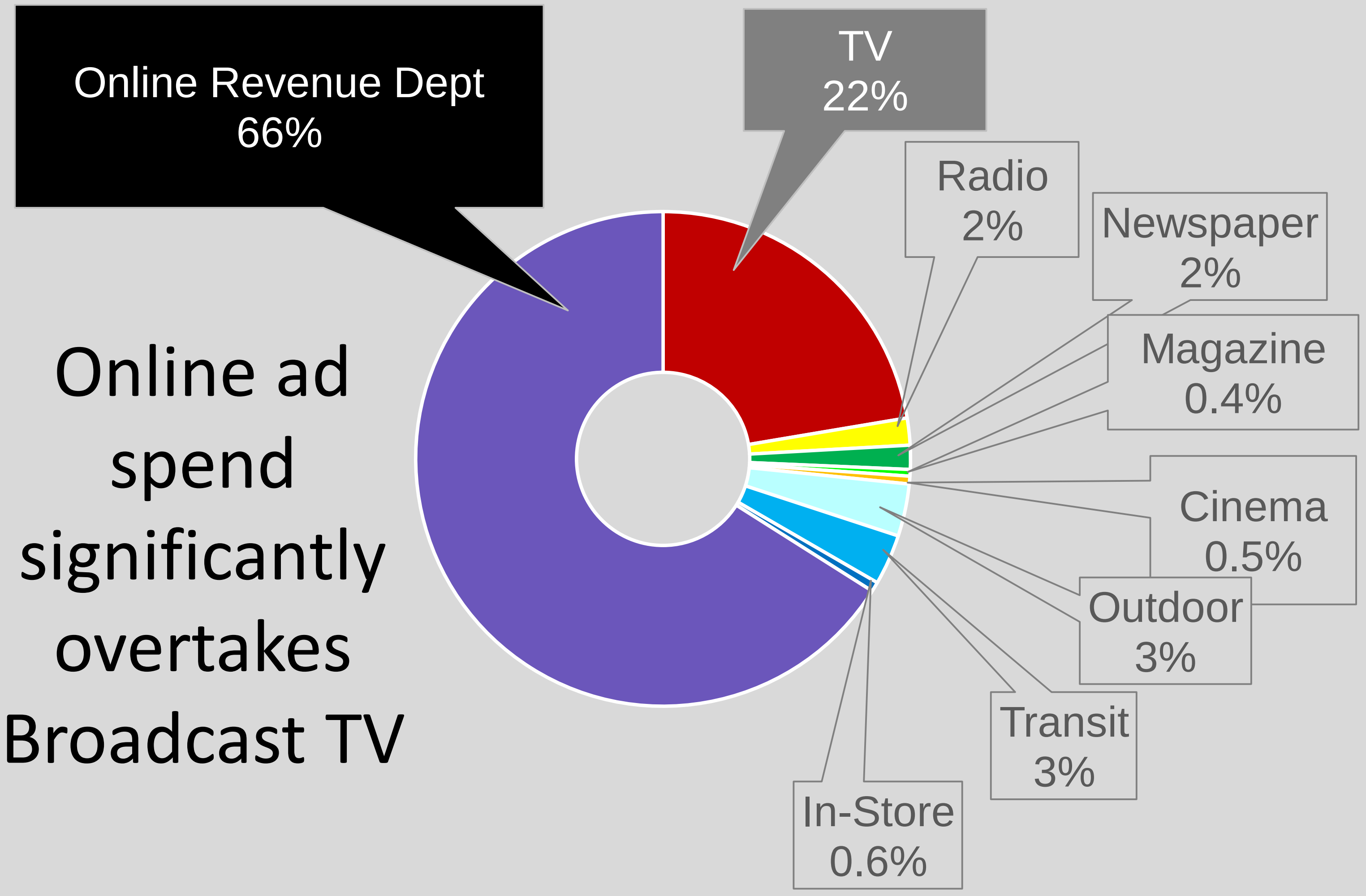
Online media spend almost equal TV and set to be surpassed by the end of 2022



"% Discount Rate" industry applied on Nielsen Monitored Adex figures. MAAT tries to establish how accurate the published figures are via three methodologies. 1) Validate Nielsen Adex with Media Vendor's Financial Report or Total Revenue from DBD (Department of business development) 2) Compare Agency discounted media rate against Nielsen Adex Rate Card 3) Apply Online ad revenue of foreign online media platform from The Revenue Department

Changing media outlook with a realistic Adex + Revenue Department





Online ad spend significantly overtakes Broadcast TV

"% Discount Rate" industry applied on Nielsen Monitored Adex figures. MAAT tries to establish how accurate the published figures are via three methodologies. 1) Validate Nielsen Adex with Media Vendor's Financial Report or Total Revenue from DBD (Department of business development) 2) Compare Agency discounted media rate against Nielsen Adex Rate Card 3) Apply Online ad revenue of foreign online media platform from The Revenue Department

ข้อเรียนนำเสนอเพื่อพิจารณา

- กฎที่ทำให้ OTT แข่งขันกับทีวีในกติกาใกล้เคียงกันที่สุด
    - กำกับดูแล OTT หรือสร้างข้อได้เปรียบให้ผู้ประกอบการโทรทัศน์มีแต้มต่อหรือสิทธิประโยชน์ที่สามารถแข่งขันกับ global platform
- การสนับสนุนการทำเรตติ้งที่สะท้อนภาพจริงของพฤติกรรมการรับชมที่ปรับเปลี่ยนแบบรวดเร็ว
- แพคเกจการขาย และผลิตภัณฑ์เน้นการเข้าถึงคนดูในทุกๆสื่อ เพื่อสร้าง diversified revenue streams
- สร้างการร่วมมือระหว่างองค์กรในภาคส่วนต่างๆ อาทิ กระทรวง DES ในการทำงานประสานเพื่อส่งเสริมผู้ผลิตสร้างสรรค์เนื้อหาที่สามารถแข่งขันได้