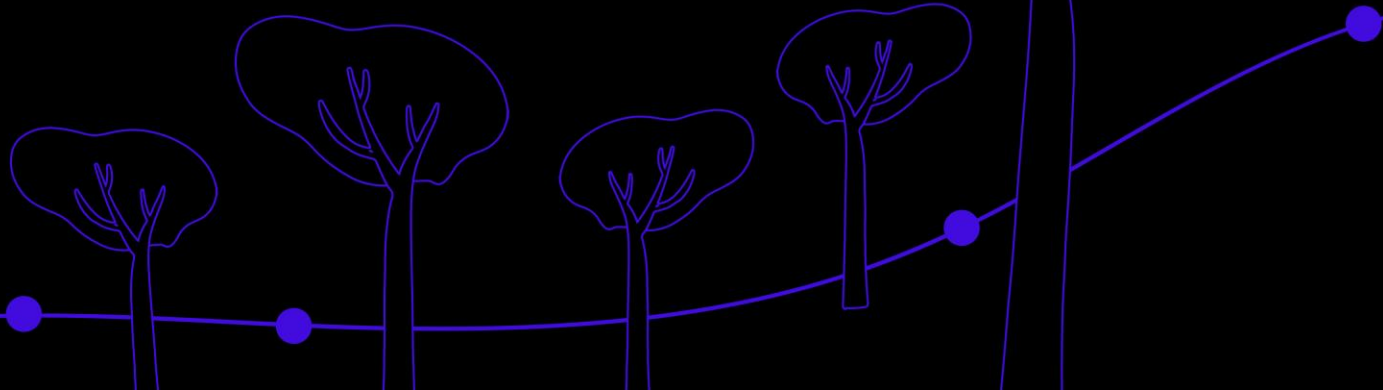


THAILAND

Digital Advertising Spend
Mid-Year 2018



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Digital Advertising Spend

MID-YEAR 2018

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Categories deep dive to enable opportunities for marketers

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Disciplines to explore digital trend

Introduction

Asia Pacific is the key region with immense internet usage, more than half of world's 3.6 billion users live in the region. In fact, this region accounted for 60% of new users coming online over the 2013 - 2018 period, according to the latest data from Euromonitor International.

In Thailand, the digital spend has been growing rapidly in the last 5 years. Digitally consumers leverage connectivity for everything from social network to online shopping. KANTAR Connected Life data reveals that Thai consumers spend 4.2 hours online everyday, increases by 17% comparing to last year. Share of time on digital medium is 61% of total online time.

The growth of Thailand's digital advertising spend soars up. The actual survey data of 2017 shows a double growth from the mid-year forecast. We expect the momentum to continue in 2018 and total volume of digital advertising spend is projected to reach 14.3 billion THB, which is also all time highest.

In partnership with KANTAR TNS, DAAT provides this data on a yearly basis. This report presents the data of actual spend 2017 and forecast 2018.

About DAAT

The Digital Advertising Association of Thailand (DAAT) was founded in 2012 with the objective to benefit the industry, companies and consumers under the same direction. With collective support, advertisers should elevate the industry at the highest levels in the future.

To support this objective the Association has been collecting and publishing digital advertising spending data since 2013. The reports keep track of the growth of spending on digital advertising in Thailand and are a valuable source of information to anyone in the advertising industry who wants to better understand the role of digital channels in the advertising landscape.



Methodology

The data in this report is collected directly from advertising and media agencies through an anonymous process to ensure the confidentiality of client's information. The information they submit is based on their internal records of advertising spending.

KANTAR TNS market research firm operating in more than 80 countries and is part of the WPP group, helps conducting the survey for over 5 consecutive years.

To improve the accuracy, before publishing the paper, participated agencies are given an insightful workshop to set the same understanding about the media type, industry sector included in the report as well as how to use the online survey program.

KANTAR TNS Thailand has collected and processed data from 22 agencies via an online survey. We aggregated the data to reflect total level. The data is split by type of digital advertising and by industry sector of the advertised brand.

Disciplines Agencies have provided spending data on the following 13 digital advertising disciplines:

Search	SEO/SEM/Mobile Search
Display	Google Display Network, website banners on website or applications
Online Video	Non-YouTube/Facebook Video ads on website or online video streaming applications e.g. Mellow, Netflix, Viu
YouTube Ad	All YouTube ads products: display, overlay, skippable/non-skippable video, sponsored card
Facebook Ad	All Facebook ads product: installed App ads, Facebook Audience Network, Facebook Messenger
Instagram Ad	Display or video ads bought only for Instagram
Twitter Ad	All types of Twitter ads: promote account, tweet or trend, including display and video format
LINE	All LINE ads product e.g. official account, LINE TV, LINE stickers, game
Instant Messaging	All types of ads via instant messaging applications e.g. Whatsapp/WeChat/Kakao account/campaign management
Social	Content sponsorship, digital PR, advertorials, and influencers
Native ad	Paid ads that match the look, feel and function of the media format in which they appear e.g. feeds, search, widgets, promoted listing.
Creative	Online Video production, web banner production, application production, and service and management
Others	Other online advertising

Methodology

Industry sectors

Agencies have provided data split by the following industry sectors of the advertised brands.

Group	Category
Finance & banking	Banks
	Insurance
	Credit/Debit Card
	Finance
Tech & electronic	Audio/Visual Electrical Products
	Computers
	Communications
	Electrical Products (Non Audio/Visual)
Food & Beverage	Alcoholic Beverages
	Non Alcoholic Beverages
	Seasoning Products
	Snack Foods
	Dairy Products & Dairy Substitute Prod.
	Bakery & Chocolate/Wafers/Biscuits
	Dietary Products
	Vitamins & Supplementary Foods
Foodstuffs	
Shops	Food Outlets & Restaurants
	Retail Shops & E-retailing
Education	Educational Institutions

Personal Care	Cosmetics
	Skin-care preparations
Clothing	Personal Accessories
	Toiletries
	Hair Preparations
Household care	Oral Products
	Clothing & Underwear
Automotive	Footwear
	Household Cleaners
	Household Equipment
	Household Insecticides & Pesticides
	Motor Vehicle Accessories
	Motor Vehicle Dealers & Rentals
	Motor Vehicles
Housing	Motorcycles & Bicycles
	Oil & Lubricants
	Petrol
Pharmaceuticals	Tyre
	Real Estate
Pet products	Furniture (Furnishings)
	Pharmaceuticals
Others	Pet Foods & Pet Products
	Photographic Products
	Office/Business Equipment
	Sundries
	Transportation
	Travel & Tours
	Entertainment & Leisure
	Multi Sections Advertising
	Media & Marketing
	CD/DVD (Musical & Film Products)
	Agricultural Products
	Building Material & Machinery
	Government & Community Announcement
	Websites and marketplace
House Ads	



Agencies

The audit was conducted in Jul 2018.

Digital advertising spend data was submitted by 20 agencies.

- 1 BRILLIANT & MILLION CO., LTD.
- 2 Carat Thailand
- 3 dentsu X (Thailand) Ltd.
- 4 Flexmedia Iprospect Co.,Ltd
- 5 GroupM
- 6 I-DAC (BANGKOK) CO., LTD
- 7 Int Digital Co.Ltd.
- 8 IPG ADVERTISING - IPG MEDIABRANDS
- 9 Isobar (Thailand) Co., Ltd.
- 10 J. Walter Thompson
- 11 MCFIVA (Thailand) Co.,Ltd.
- 12 OgilvyOne Worldwide Limited
- 13 OmnicomMediaGroup
- 14 Rabbit's Tale Co.,Ltd
- 15 Starcom Spark Foundry
- 16 Syndacast
- 17 The Leo Burnett Group Thailand
- 18 Vizeum Thailand
- 19 Winter Egency Co., Ltd.
- 20 ZenithOptimedia Thailand

brilliant&million

CARAT

dentsu x

FLEX iProspect.
Driving Digital Performance

groupm

i-dac
BANGKOK

int
digital

IPG MEDIABRANDS

isobar

J. WALTER THOMPSON BANGKOK

MCFIVA

OgilvyOne
worldwide

OmnicomMediaGroup
omg phd

RABBIT
DIGITAL GROUP

Starcom

SYNDACAST

The Leo Burnett Group
Thailand
Black Panel alphaaxis

Vizeum

WE
WINTER AGENCY
WE PUSH DIGITAL BOUNDARIES

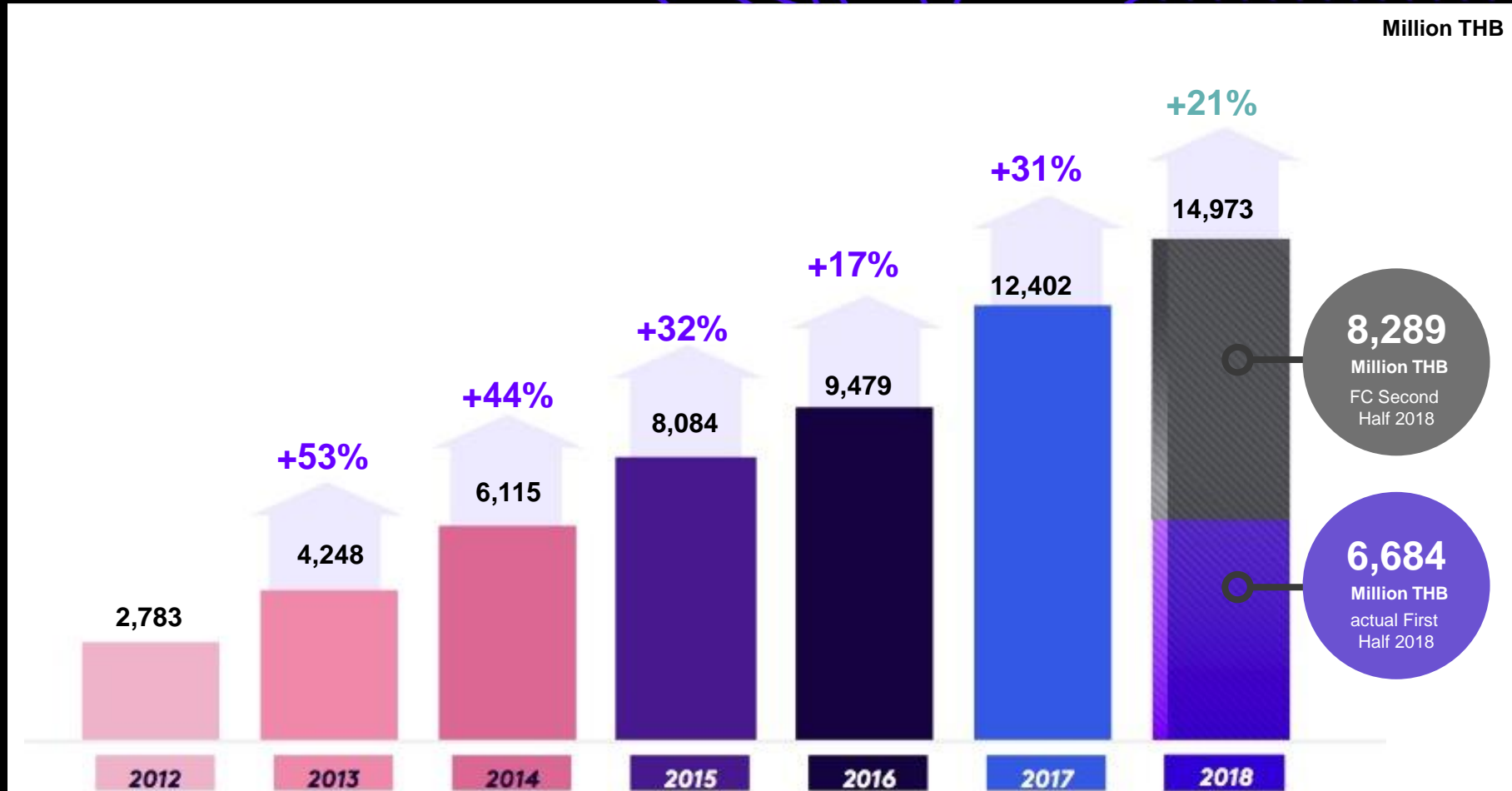
Zenith
The ROI Agency

Remark:

Reported numbers are based on reported spending data of a sample of 20 agencies. DAAT estimates that the sample of agencies represents 80% of spending in the market. The numbers presented on this page are upgraded proportionally to reflect 100% of the market.

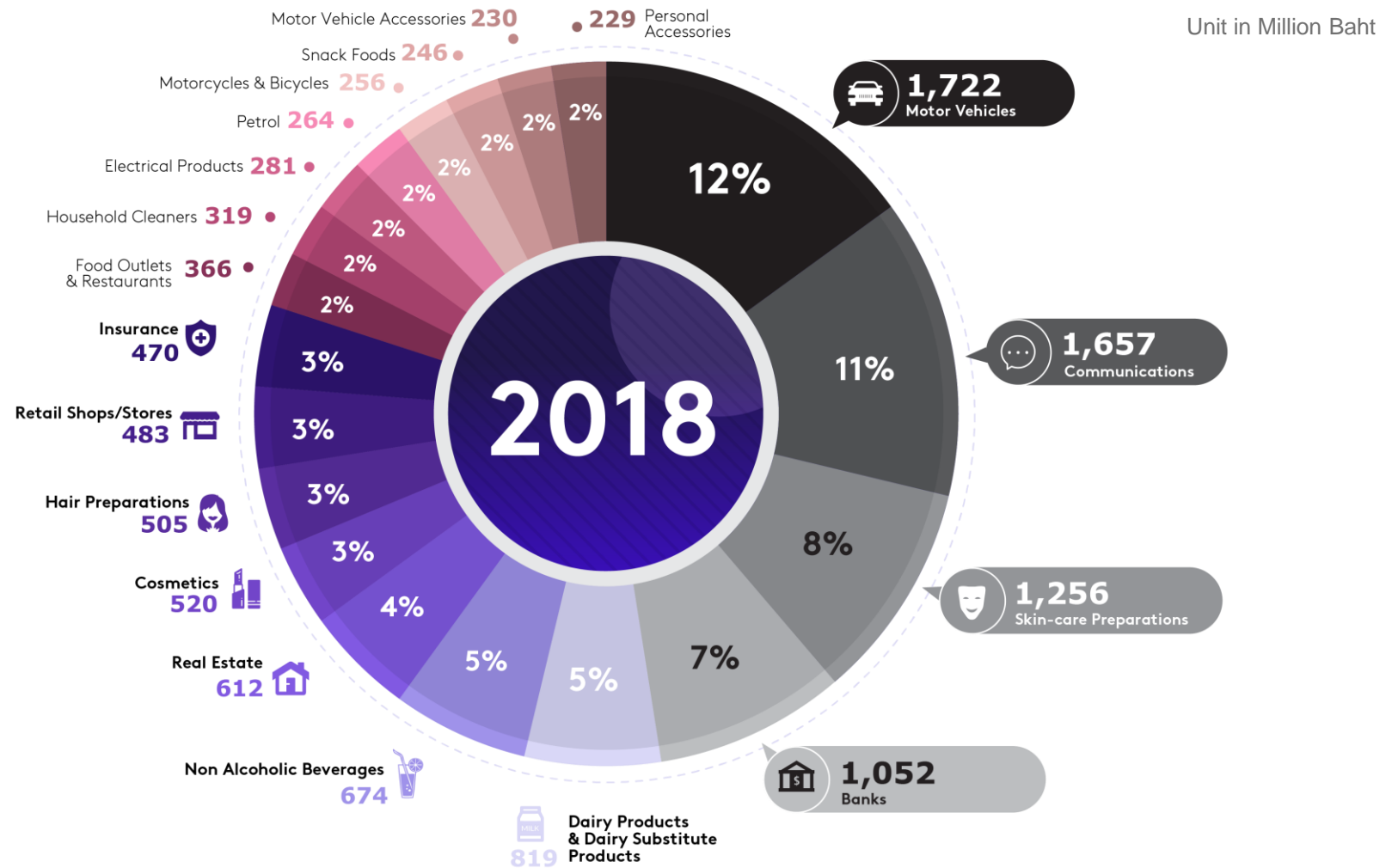
Total Spending

Thailand digital advertising spending has been going upwards. Overall spending in 2018 is expected to reach 14,973 million THB, 21% increment from 2017, by the end of this year.



2018 Top Industry Spending

Motor Vehicles and **Communications** continues to be the biggest spenders in digital advertising, followed by **Skin-care Preparations**, which grew past Banks and claimed third rank this year.

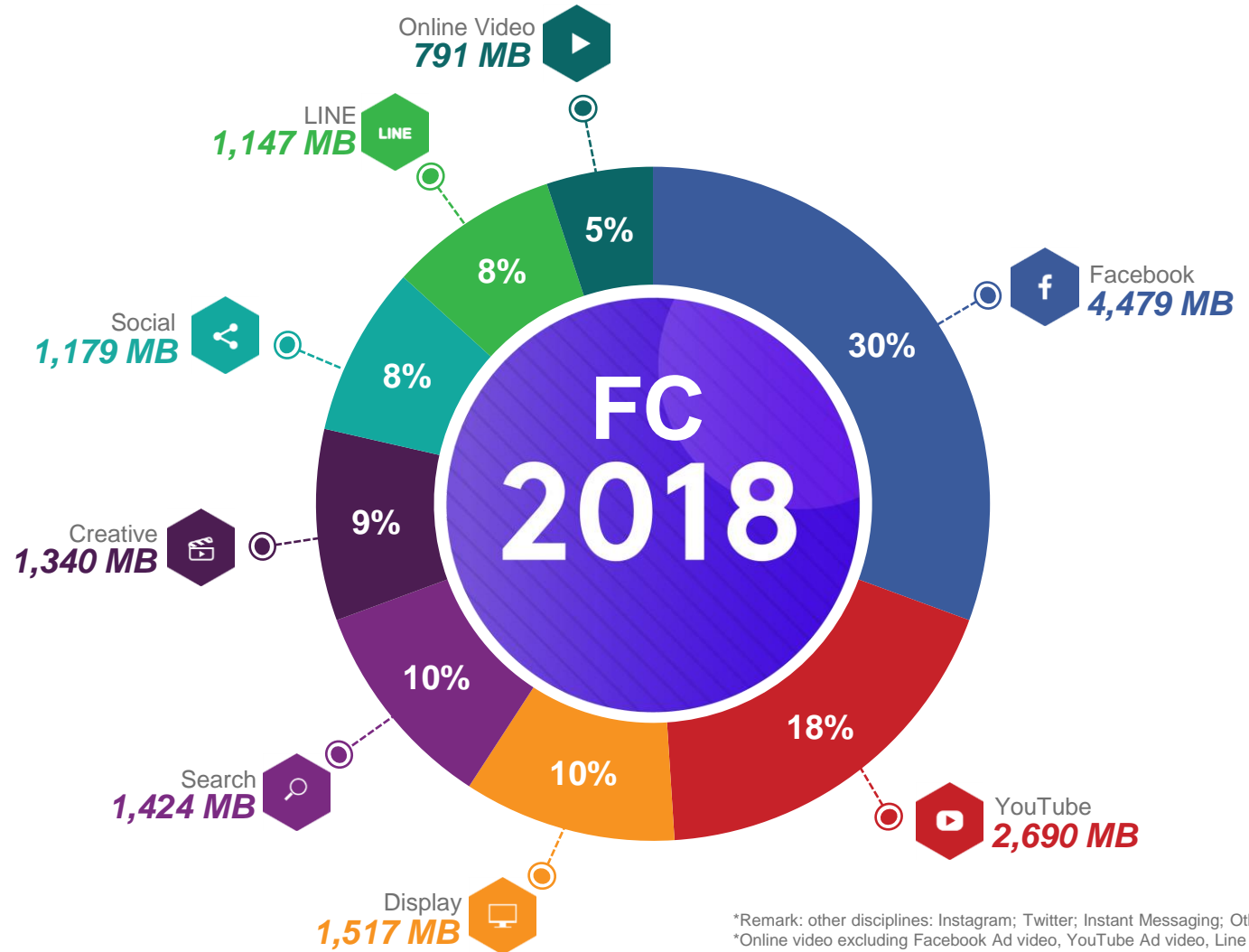


*Remark: other categories = 20%

2018 Discipline Spending

Facebook, YouTube, and Display continues to grow and remain disciplines most invested in, in 2018.

LINE, Twitter and Instagram Ad are disciplines with highest growth this year.



*Remark: other disciplines: Instagram; Twitter; Instant Messaging; Others = 2%
*Online video excluding Facebook Ad video, YouTube Ad video, Line video, Instagram Ad video

Highlights in 2018

- Thailand Digital Advertising Spend has grown past the predicted rate. It is expected to reach THB 15 billion by the end of 2018
- Motor Vehicles, Communications, and Skin-care Preparations are the biggest spenders in digital advertising.
- Industries with highly segmented consumers such as Skin-care Preparations and Real-Estate are industries with highest growth rate among the top 10 biggest spenders.
- While Facebook and YouTube are main channels for brands' digital spending, LINE is remarked with highest growth among top 10 disciplines.



THANK YOU

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