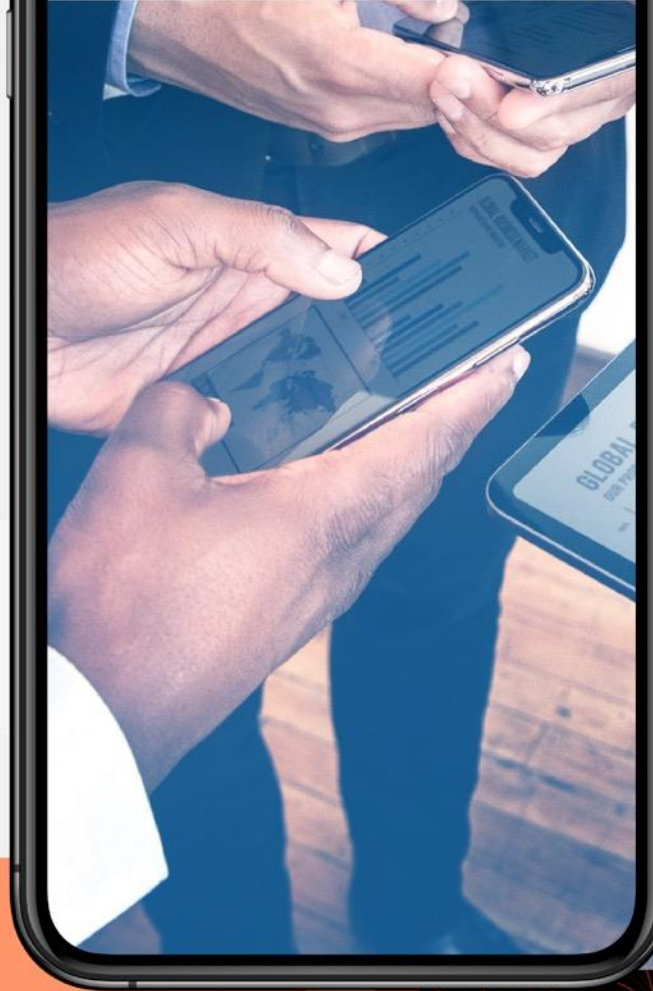


# THAILAND

## DIGITAL ADVERTISING SPEND

Mid-Year 2020



57

Categories deep dive to enable opportunities for marketers

14

Disciplines to explore digital trends

# Agencies

The audit was conducted in July 2020.

Digital advertising spend data was submitted by 42 agencies.

- 1 Adapter Digital Co., Ltd
- 2 Brilliant&Million Co, Ltd
- 3 Carat (Thailand) Co., Ltd
- 4 Dentsu X (Thailand) Ltd
- 5 Dentsu Mcgarrybowen
- 6 Digital Homemade by the sun
- 7 Digitas Thailand
- 8 Ewit Co., Ltd
- 9 Far East Fame Line DDB Plc.
- 10 Flexmedia Iprospect Co., Ltd
- 11 Generation Advertising
- 12 Grey (Thailand) Co., Ltd.
- 13 GroupM
- 14 Havas Riverorchid (Thailand) Co., Ltd.
- 15 Herolead
- 16 I-DAC (BANGKOK)
- 17 Interspace Co., Ltd
- 18 IPG Mediabrands - BPN
- 19 IPG Mediabrands - Ensemble
- 20 IPG Mediabrands - Initiative
- 21 IPG Mediabrands - Reprise
- 22 IPG Mediabrands - UM
- 23 Isobar (Thailand) Co., Ltd.
- 24 Itopplus Co., Ltd
- 25 Autodigi
- 26 Plusventure Co., Ltd.
- 27 J Walter Thompson Bangkok Group
- 28 Omnicom Media Group
- 29 Prakrit Holdings Public Company Limited
- 30 MediaCom Thailand
- 31 Mindshare Thailand
- 32 mInteraction Co., Ltd
- 33 Rabbit Digital Group Co., Ltd
- 34 Rabbit's Tale Co., Ltd
- 35 Showroom111 Co., Ltd
- 36 Starcom MediaVest Group
- 37 Syndacast Co., Ltd
- 38 The Leo Burnett Group Thailand
- 39 Vizeum (Thailand) Vo. Itd
- 40 Winter Agency Co., Ltd
- 41 Zenith Thailand
- 42 Wavemaker



## Remark:

Reported numbers are based on reported spending data of a sample of 42 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.

# Methodology

## Industry sectors

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

Category	Industry	
Finance & banking	Banks	
	Insurance	
	Credit/Debit Cards	
Technology & Electronic	Finance Services	
	Communications & Devices	
	Computers	
	Audio/Visual Electrical Products	
	Electrical Products (Non Audio/Visual)	
	Alcoholic Beverages	
	Non-Alcoholic Beverages	
	Seasoning Products	
	Snack Foods	
	Dairy Products & Dairy Substitute Prod.	
Food & Beverage	Bakery & Chocolate/Wafers/Biscuits	
	Dietary Products	
	Vitamins & Supplementary Foods	
	Foodstuffs	
	Food Outlets & Restaurants	
	Retail Shops	
	E-commerce Business	
	Shops	

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

# Disciplines

Agencies have provided spending data on the following 14 digital advertising disciplines:

<b>Facebook Ads</b>	All Facebook ads product, installed App ads, Facebook Audience Network, Facebook Messenger
<b>Instagram Ads</b>	Display or video ads bought only for Instagram (100% separated from Facebook)
<b>YouTube Ads</b>	All YouTube ads product including display, overlay, skippable/non-skippable video, sponsored card
<b>Display</b>	Google Display Network, website banners displayed on website or applications
<b>Online Video</b>	Non-YouTube/Facebook Video ads on website or online video streaming applications e.g. Mellow, Netflix, Viu
<b>Creative Production</b>	Online Video production, web banner production, application production, and service and management
<b>Search</b>	SEO, SEM, Mobile Search
<b>Social</b>	Content sponsorship, digital PR, advertorials, and influencers
<b>LINE</b>	All LINE ads product e.g. official account, LINE TV, LINE stickers, game
<b>Native Ads</b>	Paid ads that match the look, feel and function of the media format in which they appear e.g. feeds, search, widgets, promoted listing.
<b>Twitter Ads</b>	All types of Twitter ads that use to promote account, tweet or trend, including display and video format
<b>Instant Messaging</b>	All types of ads via instant messaging applications e.g. Whatsapp/WeChat/Kakao account/campaign management and push messaging application
<b>Affiliate Marketing</b>	All types of ads via automated marketing program leading customers to click on affiliate links including pay-per-click, pay-per-lead, and pay-per-sale.
<b>Others</b>	Other online advertising

# Sub-Disciplines

<b>Display</b>	<ul style="list-style-type: none"> <li>Display Direct</li> <li>Display Ad Network</li> <li>Display Programmatic</li> </ul>
<b>Online Video</b>	<ul style="list-style-type: none"> <li>Online Video Direct</li> <li>Online Video Ad Network</li> <li>Online Video Programmatic</li> </ul>
<b>YouTube Ad</b>	<ul style="list-style-type: none"> <li>YouTube Ad Desktop Display</li> <li>YouTube Ad Mobile Display</li> <li>YouTube Ad Desktop Video</li> <li>YouTube Ad Mobile Video</li> </ul>
<b>Facebook Ad</b>	<ul style="list-style-type: none"> <li>Facebook Ad Desktop Display</li> <li>Facebook Ad Mobile Display</li> <li>Facebook Ad Desktop Video</li> <li>Facebook Ad Mobile Video</li> </ul>
<b>Instagram Ad</b>	<ul style="list-style-type: none"> <li>Instagram Ad Display</li> <li>Instagram Ad Video</li> </ul>
<b>Creative</b>	<ul style="list-style-type: none"> <li>Creative Video Production</li> <li>Creative Web Banner &amp; App Production</li> <li>Creative Social Media Platform Management</li> <li>Creative App Production</li> </ul>
<b>LINE</b>	<ul style="list-style-type: none"> <li>LINE Direct</li> <li>LINE Video</li> <li>LINE Display</li> <li>LINE Other</li> </ul>
<b>Search</b>	
<b>Twitter</b>	
<b>Instant Messaging</b>	
<b>Social</b>	
<b>Native Ads</b>	
<b>Others</b>	
<b>Affiliated Marketing</b>	<b>NEW FROM Y19</b>

NEW FROM Y19

**Affiliate Marketing**

**Others**

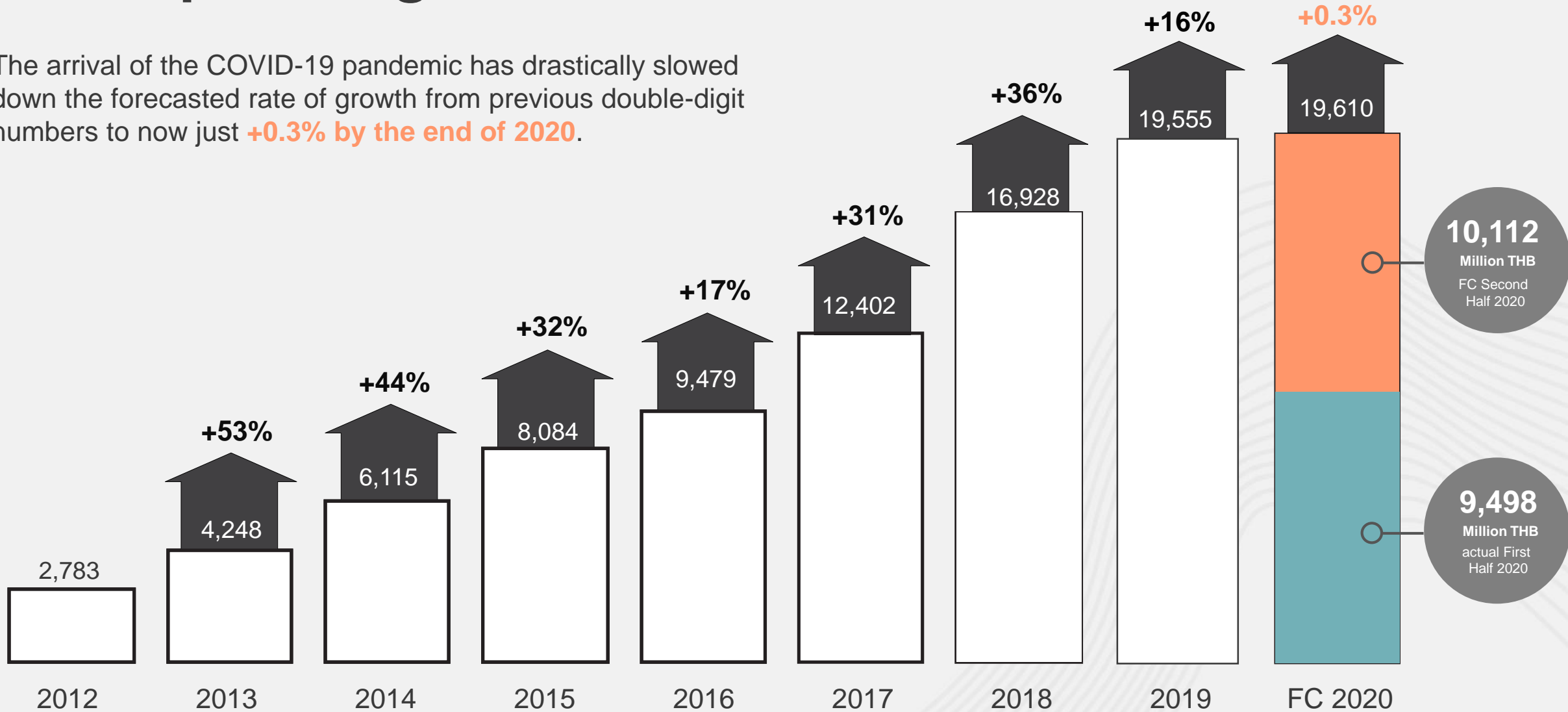
# Highlights of Report

- The arrival of the **COVID-19** pandemic has drastically slowed down the forecasted rate of growth from previous double-digit numbers to now just **+0.3% by the end of 2020**.
- **Motor Vehicles** spending is forecasted to shrink by a considerable -200M THB from previous year. **Banks** are also forecasted to shrink by -350M THB to be outseated by **Dairy** for the number 5th spot among highest spending industries.
- **Dairy & Dairy Substitute Products** is forecasted to show the highest growth rate of +39%.
- **Skin-Care Preparations** illustrates the slowest positive growth rate of +5%.
- **Facebook, YouTube, and Creative** remain the dominant disciplines with minimal forecasted decline in spending from 2019.
- **Search and Social** lead in terms of growth at +32% and +26% respectively.
- **Display, Instagram, and Affiliated Marketing** spends are forecasted to shrink the most at -30%, -13%, and -13% respectively.
- Advertisers expect the **disruption** from COVID to persist through the end of the year stressing the need for **further education, accelerating digital transformation, and re-examining current ways of working to adapt to new realities**.

# SPENDING

# Total Spending





















The arrival of the COVID-19 pandemic has drastically slowed down the forecasted rate of growth from previous double-digit numbers to now just **+0.3% by the end of 2020**.





# The 5 Highest Spenders

**Motor Vehicles** has remained the highest spender since 2018, but spending is forecasted to shrink by a considerable **-200M THB** from previous year. **Banks** are also forecasted to shrink by **-350M THB** to be outseated by **Dairy** for the number 5<sup>th</sup> spot among highest spending industries.

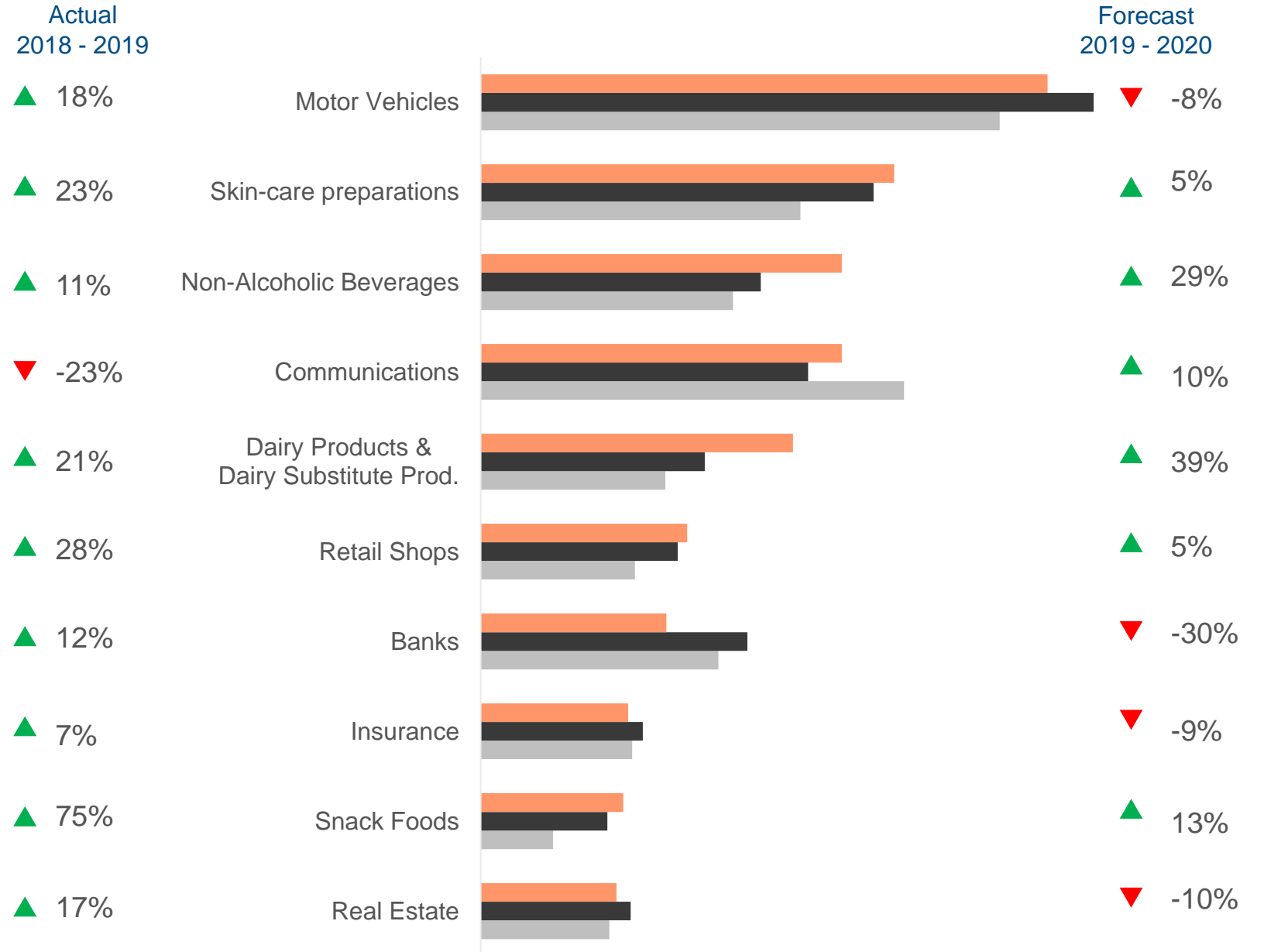
2017	2018	2019	FC 2020
Motor Vehicles  1,289	Motor Vehicles  2,361	Motor Vehicles  2,787	Motor Vehicles  2,577
Communications  1,195	Communications  1,925	Skin-care Preparations  1,786	Skin-care Preparations  1,880
Banks  847	Skin-care Preparations  1,454	Communications  1,489	Non-Alcoholic Beverages  1,643
Skin-care Preparations  723	Non-Alcoholic Beverages  1,148	Non-Alcoholic Beverages  1,273	Communications  1,642
Non-Alcoholic Beverages  644	Banks  1,080	Banks  1,212	Dairy Products & Dairy Substitute Product  1,420

# Top 10 Spending Growth by Industries

**Dairy & Dairy Substitute Products** is forecasted to show the highest growth rate of **+39%**.

**Skin-Care Preparations** illustrates the slowest positive growth rate of **+5%**.

**Banks** is the industry forecasted to cut back on spending the most at **-30%**.



# Discipline Spending

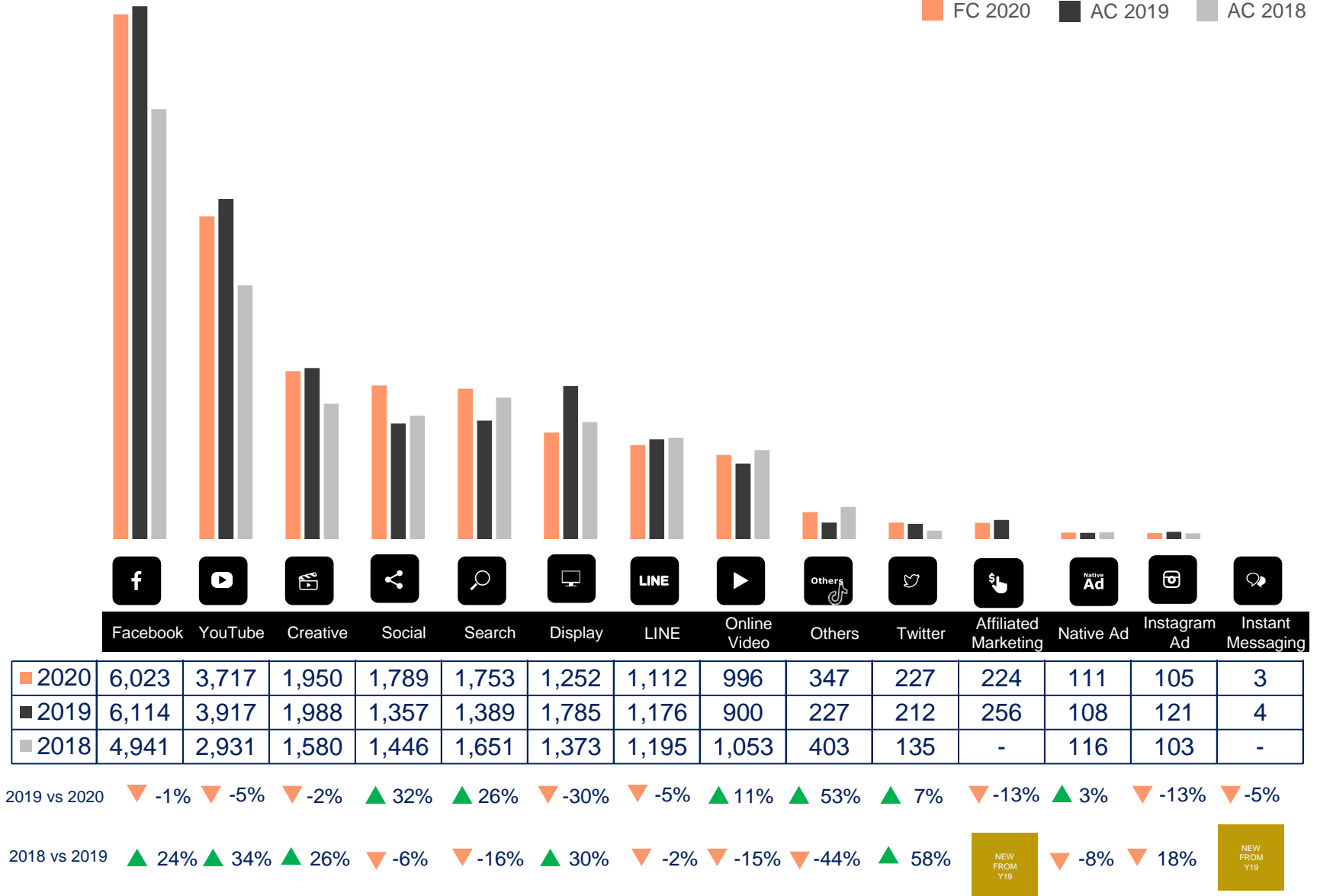
Facebook, YouTube, and Creative remain the dominant disciplines with minimal forecasted decline in spending from 2019.

Search and Social are lead in terms of growth at +32% and +26% respectively.

Display, Instagram, and Affiliated Marketing spends are forecasted to shrink the most at -30%, -13%, and -13% respectively.

Unit in Million Baht

FC 2020 AC 2019 AC 2018



# Industry Leaders

**KANTAR** interviewed a number of industry leaders to get their views and expectations of the digital marketing industry.

The following persons have contributed their view:

- ❑ **Siwat Chawareewong**  
*CEO, GroupM Thailand*
- ❑ **Rajsak Asawasupachai**  
*Managing Director, IPG Mediabrands Digital*
- ❑ **Pacharee Permvongusawa**  
*Business Unit Head – Digital, Publicis Media*
- ❑ **Paruj Daorai**  
*Managing Director, Digitas Bangkok*
- ❑ **Duangporn Mujanatongsuk**  
*Managing Director - Media Business, dentsu X Thailand*
- ❑ **Narin Yenthanakorn**  
*Chief Operating Officer - i-dac (Bangkok)*



# Directory



Facebook



YouTube



Display



Social



Search



Creative



Instant Messaging



Online Video



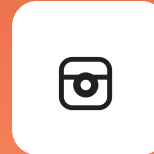
LINE



Native ad



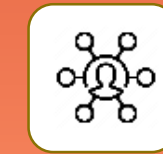
Others



Instagram



Twitter

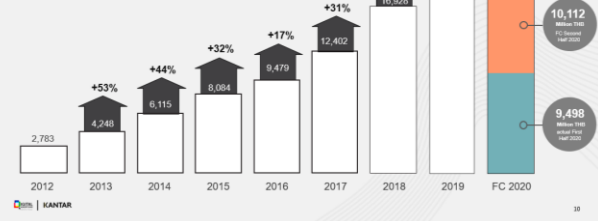


Affiliated  
Marketing

# Full Report Snapshot

## Total Spending

The arrival of the COVID-19 pandemic has drastically slowed down the forecasted rate of growth from previous double-digit numbers to now just +0.3% by the end of 2020.



KANTAR

## FC 2020 Top Industry Spending

The Motor Vehicles industry continues to be the largest spending industry. Banks are outsold by Dairy Products at the number 5 position.



KANTAR

## The 5 Highest Spenders

Motor Vehicles has remained the highest spender since 2018, but spending is forecasted to shrink by a considerable 200M THB from previous year. Banks are also forecasted to shrink by -35M THB to be outsold by Dairy for the number 9th spot among highest spending industries.

Industry	2017	2018	2019	FC 2020
Motor Vehicles	1,289	2,361	2,787	2,577
Communications	1,195	1,925	1,786	1,880
Banks	847	1,454	1,489	1,643
Skin-care Preparations	723	1,148	1,273	1,642
Non-Alcoholic Beverages	644	1,080	1,212	1,420

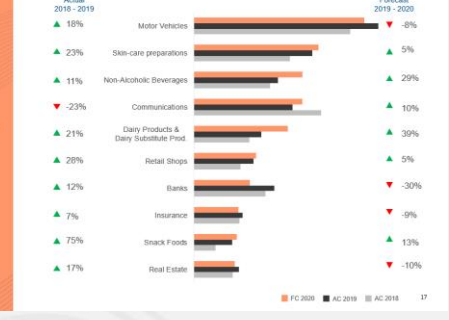
KANTAR

## Top 10 Spending Growth by Industries

Dairy & Dairy Substitute Products are forecasted to show the highest growth rate of +39%.

Skin-Care Preparations also shows the second positive growth rate of +19%.

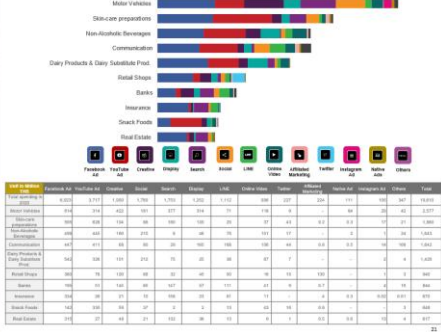
Banks is the industry forecasted to cut back on spending the most at -30%.



KANTAR

## Top Spending Industry by Discipline

Motor Vehicles to the highest digital spender, comprised of Facebook at 614M, followed by Creative at 423M, and Search at 273M. Facebook and YouTube dominate the proportion of digital spending in the total spending in 2020.

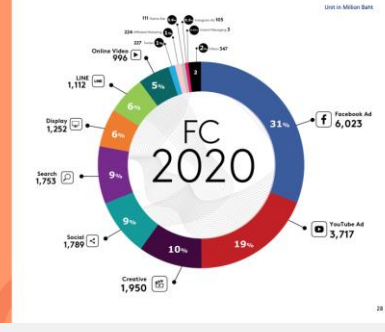


KANTAR

## FC 2020 Discipline Spending

Facebook and YouTube are still the disciplines that dominate, accounting for half of total discipline spending.

The spending on Search and Social have increased significantly at +26% and +32% respectively. While Display shows great decline at -50%.

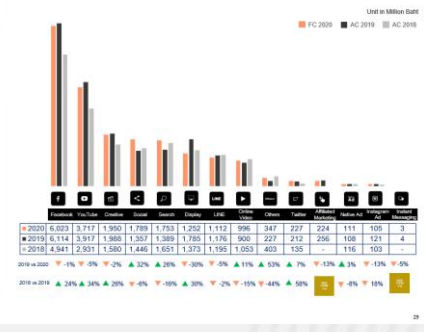


KANTAR

## Discipline Spending

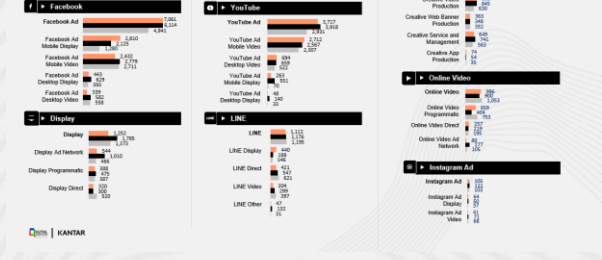
Facebook, YouTube, and Creative continue to be the disciplines with minimal forecasted decline in spending from 2019.

Search and Social are lead to increase growth at +32% and +26% respectively. Display, Instagram, and Affiliated Marketing are forecasted to shrink the most at -30%, -13%, and -12% respectively.



KANTAR

## Sub-Discipline Movement



KANTAR

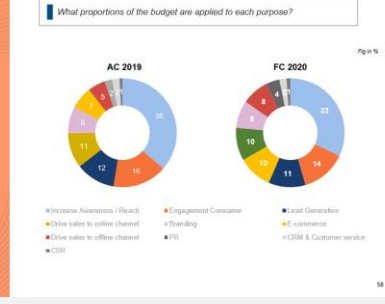
## Automotive 3,103



KANTAR

## Digital Advertising Objectives

Awareness continues to be the objective of highest priority, being the first rank in 2019 and 2020.



KANTAR

## What fields are most important to digital marketers?

Data Analytics is the most important field in the view of digital marketers. Content increases in importance from #3 to #2.



KANTAR

### Snapshot for Top Industry Motor Vehicles

2,577 Growth -8%

FC 2020

Channel	Spending (Million THB)	% Growth
Instagram Ad	207	-1
Twitter Ad	76	-3
Creative	56	-21
Online Video	47	-26
Social	19	-33
LINE	4	-38
Instant Messaging	0	-100

Search Native Ads Facebook Ad Youtube Ad Display Others Affiliated Marketing

# Excel Files With Full Report

	Total					Display					Online Video					YouTube Ad				
	AC2018 (total)	Actual 1st Half 2019 (total)	2nd Half 19 (FC)	2019 (total)	FC Growth Y19 vs Y18	AC2018 (total)	Actual 1st Half 2019 (total)	2nd Half 19 (FC)	2019 (total)	FC Growth Y19 vs Y18	AC2018 (total)	Actual 1st Half 2019 (total)	2nd Half 19 (FC)	2019 (total)	FC Growth Y19 vs Y18	AC2018 (total)	Actual 1st Half 2019 (total)	2nd Half 19 (FC)	2019 (total)	FC Growth Y19 vs Y18
<b>RESPONDENTS</b>																				
<b>WTD. RESP.</b>																				
<b>TOTAL SCORE</b>																				
<b>Industry</b>																				
<b>Finance &amp; Banking (Net)</b>																				
Banks																				
Insurance																				
Credit/Debit Cards																				
Finance																				
<b>Tech &amp; Electronic (Net)</b>																				
Audio/Visual Electrical Products																				
Computers																				
Communications																				
Electrical Products																				
<b>Food &amp; Beverage (Net)</b>																				
Alcoholic Beverages																				
Non Alcoholic Beverages																				
Seasoning Products																				
Snack Foods																				
Dairy Products & Dairy Substitute Pro																				
Bakery & Chocolate/Wafers/Biscuits																				
Dietary Products																				
Vitamins & Supplementary Foods																				
Foodstuffs																				
<b>Shops (Net)</b>																				
Food Outlets & Restaurants																				
Retail Shops/Shores																				
<b>Education (Net)</b>																				
Educational Institutions																				
<b>Personal Care (Net)</b>																				
Cosmetics																				
Skin-care Preparations																				
Personal Accessories																				
Toiletries																				
Hair Preparations																				
Oral Products																				
<b>Clothing (Net)</b>																				
Clothing & Underwear																				
Footwear																				
<b>Household Care (Net)</b>																				
Household Cleaners																				
Household Equipment & Furnishings																				

EXAMPLE ONLY

	Total					Net: Finance & Banking					Net: Tech & Electronic					Net: Food & Beverage				
	AC2018 (total)	Actual 1st Half 2019 (total)	2nd Half 19 (FC)	2019 (total)	FC Growth Y19 vs Y18	AC2018 (total)	Actual 1st Half 2019 (total)	2nd Half 19 (FC)	2019 (total)	FC Growth Y19 vs Y18	AC2018 (total)	Actual 1st Half 2019 (total)	2nd Half 19 (FC)	2019 (total)	FC Growth Y19 vs Y18	AC2018 (total)	Actual 1st Half 2019 (total)	2nd Half 19 (FC)	2019 (total)	FC Growth Y19 vs Y18
<b>RESPONDENTS</b>																				
<b>WTD. RESP.</b>																				
<b>TOTAL SCORE</b>																				
<b>Spending data (THB)</b>																				
<b>Display</b>																				
Display Direct																				
Display Ad Network																				
Display Programmatic																				
<b>Online Video</b>																				
Online Video Direct																				
Online Video Ad Network																				
Online Video Programmatic																				
<b>YouTube Ad</b>																				
YouTube Ad Desktop Display																				
YouTube Ad Mobile Display																				
YouTube Ad Desktop Video																				
YouTube Ad Mobile Video																				
<b>Facebook Ad</b>																				
Facebook Ad Desktop Display																				
Facebook Ad Mobile Display																				
Facebook Ad Desktop Video																				
Facebook Ad Mobile Video																				
<b>Instagram Ad</b>																				
Instagram Ad Display																				
Instagram Ad Video																				
<b>Creative</b>																				
Creative Video Production																				
Creative Web Banner & App Product																				
Creative Social Media Platform Mana																				
Creative App Production																				
<b>LINE</b>																				
LINE Direct																				
LINE Video																				
LINE Display																				
LINE Other																				
Search																				
Twitter																				
Instant Messaging																				
Social																				
Native Ads																				
Others																				
Affiliated Marketing																				

EXAMPLE ONLY

# KANTAR

For more information, please visit our website by clicking on a banner OR scan the QR code below to purchase the latest DAAT report.



**Online purchase** (Report package only, no processing fee)  
**Offline purchase** (Report package + processing fee)

**USD 499 (excl. VAT)**  
**THB 19,000 (excl. VAT)**

For inquiries, contact:

Carlos Dominguez  
Chonnikan Waiyawut  
Thanyaphorn Thitilert

Head of Media & Digital  
Head of PR/Marketing  
Social Pulse Executive

[Carlos.Dominguez@kantar.com](mailto:Carlos.Dominguez@kantar.com)  
[Chonnikan.Waiyawut@kantar.com](mailto:Chonnikan.Waiyawut@kantar.com)  
[Thanyaphorn.Thitilert@kantar.com](mailto:Thanyaphorn.Thitilert@kantar.com)



Digital Advertising Spend  
Mid-Year 2020

**THANK YOU**