

# 2024 Media Industry Update “Emerging of OOH Commerce”

Wednesday 21<sup>st</sup>, February 2024  
@ Esplanade Major Cineplex



# Agenda

- 09.30-10.00 Register
- 10.10-11.15
  - 2023 ADEX
  - 2024 ADEX Projection
  - 2024 Inflation Projection
  - 2024 Trend
- 11.15-11.50 Panel discussion “Emerging of OOH Commerce”
- 11.50-12.00 Q&A / Group Photo

# Team



ภวัต เรืองเดชวรชัย  
President & CEO, Media Intelligence  
Group/ MAAT's Vice President



จิณณารัชช์ สัมพันธ์รัตน์ (ตาย)  
MD, OMD Thailand/ MAAT  
Committee



นันทน์ภัส โชติรัตนกาญจน์ (อุย)  
HEAD OF INVESTMENT  
OMNICOM MEDIA GROUP  
(THAILAND)



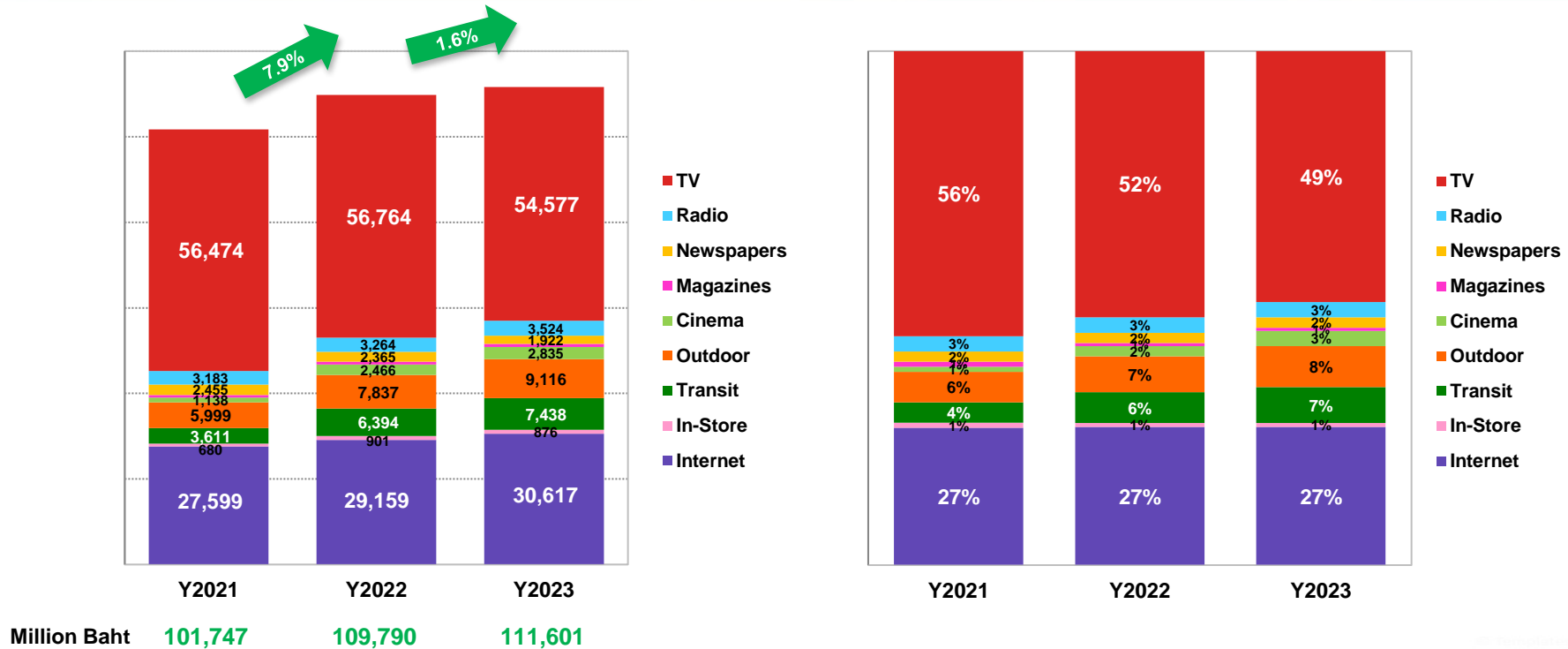
สิริพร แมนญาติ (ต๋ม)  
MD, UM Thailand/ MAAT  
Committee



สุทธิลักษณ์วงศ์วรเศรษฐ์ (เป็ย)  
Data & Technology Intelligence  
- Associate Director, Media  
Intelligence Group

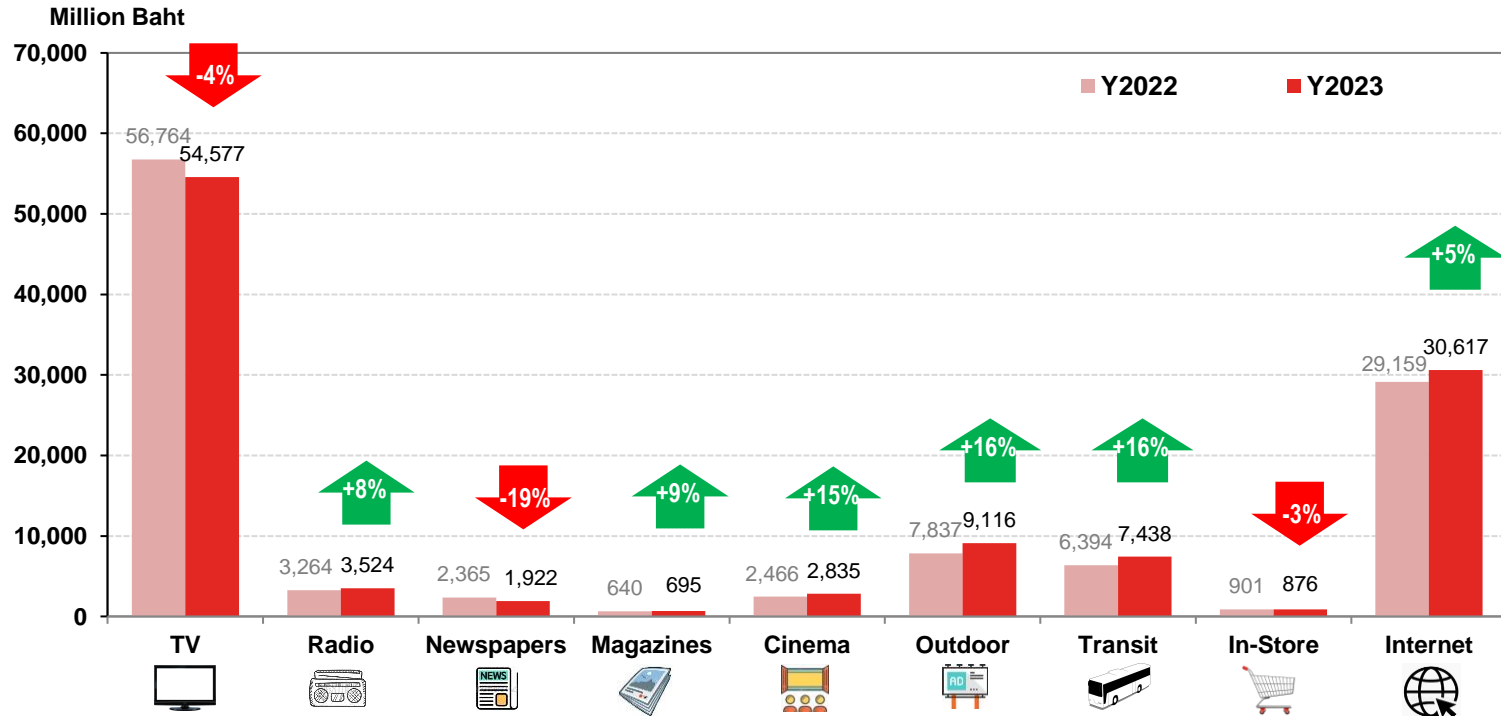
# 2023 Advertising Spending Update

# Media Industry Spending



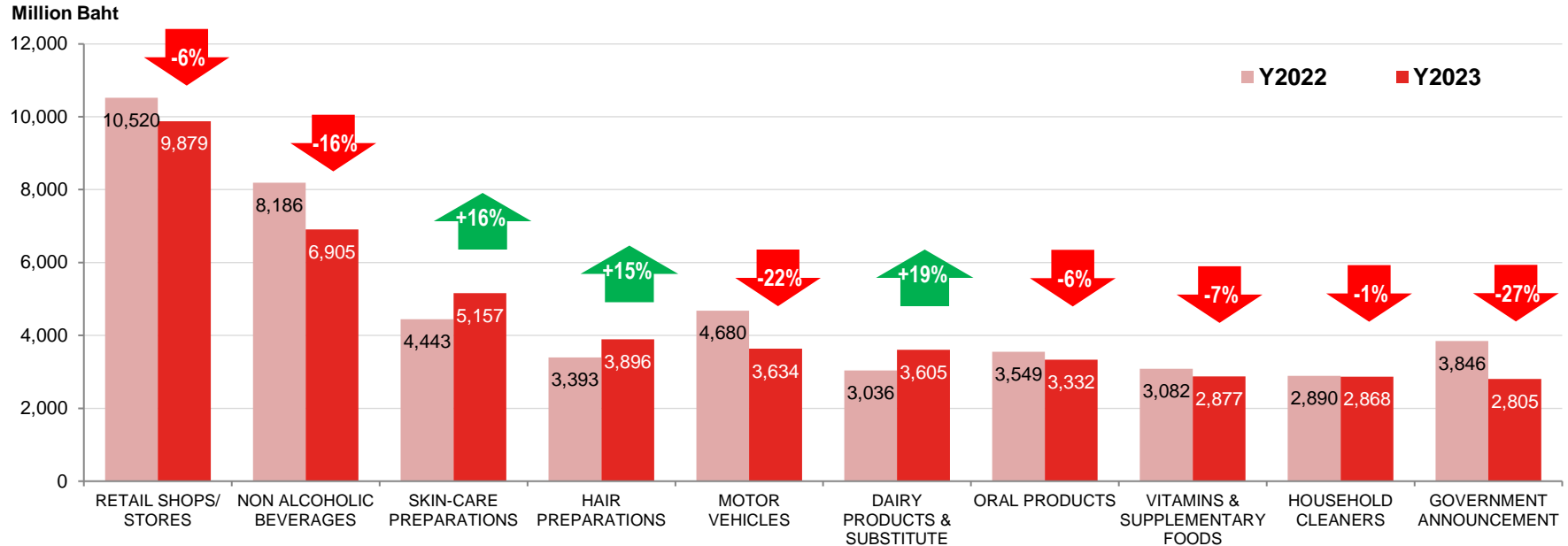
Source: The Nielsen Company, Excluded - Advertising agencies/digital marketing -CD/DVD (musical & film products) -Transportation -Direct sales/Home shopping -Classified -House ads. Internet from DAAT add 30% key platforms direct

# Media Industry Spending



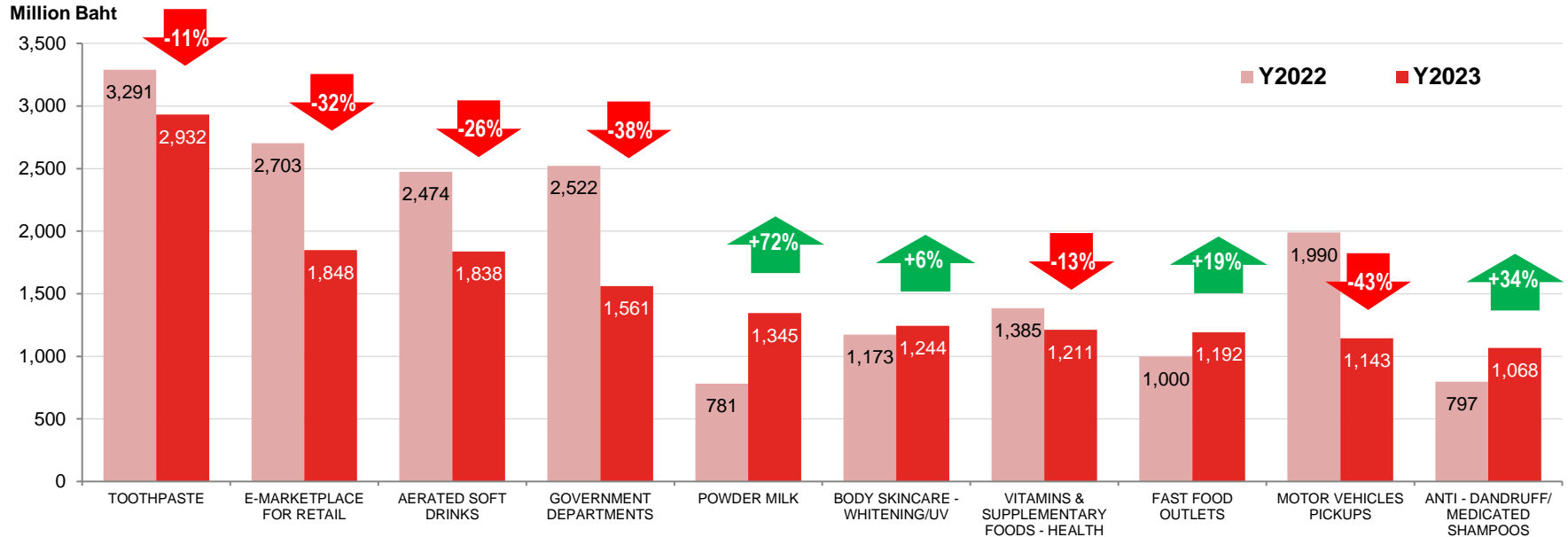
Source: The Nielsen Company, Excluded - Advertising agencies/digital marketing -CD/DVD (musical & film products) -Transportation -Direct sales/Home shopping -Classified -House ads. Internet from DAAT add 30% key platforms direct

# Top 10 Sections



Source: The Nielsen Company, Excluded - Advertising agencies/digital marketing -CD/DVD (musical & film products) -Transportation -Direct sales/Home shopping -Classified -House ads.

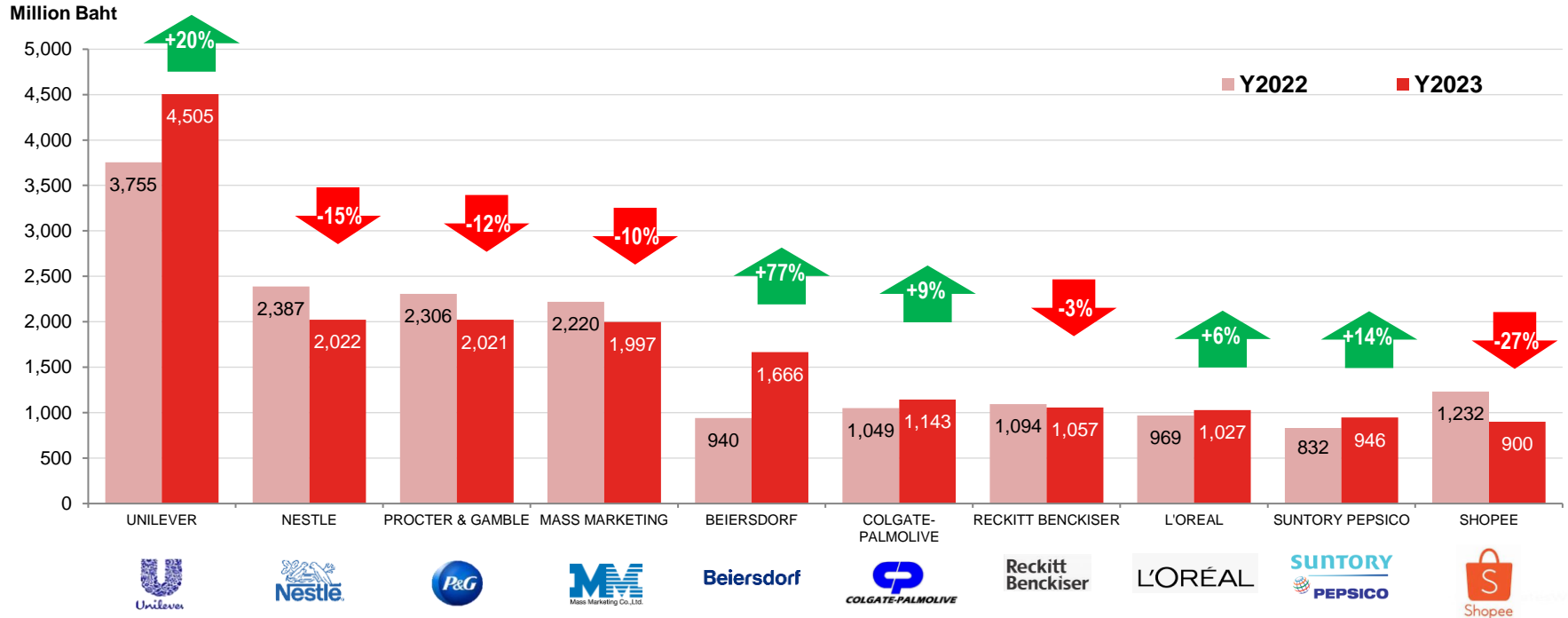
# Top 10 Categories



Source: The Nielsen Company, Excluded - Advertising agencies/digital marketing -CD/DVD (musical & film products) -Transportation -Direct sales/Home shopping -Classified -House ads.



# Top 10 Advertisers



Source: The Nielsen Company, Excluded - Advertising agencies/digital marketing -CD/DVD (musical & film products) -Transportation -Direct sales/Home shopping -Classified -House ads.

# 2024 Advertising Spending Projection

# 2024 Media Spending Growth Indicators



A batch of new conflicts could erupt in 2024



Tourism, exports, consumption to drive 2024 GDP growth at 2.8%

Source: The Financial Ministry



In-person gatherings are back to normal



New shopping malls and mixed-use projects opening



Digital wallet pending



Public transit expansion



Vehicle bookings at 2023 TH Motor Expo +45%

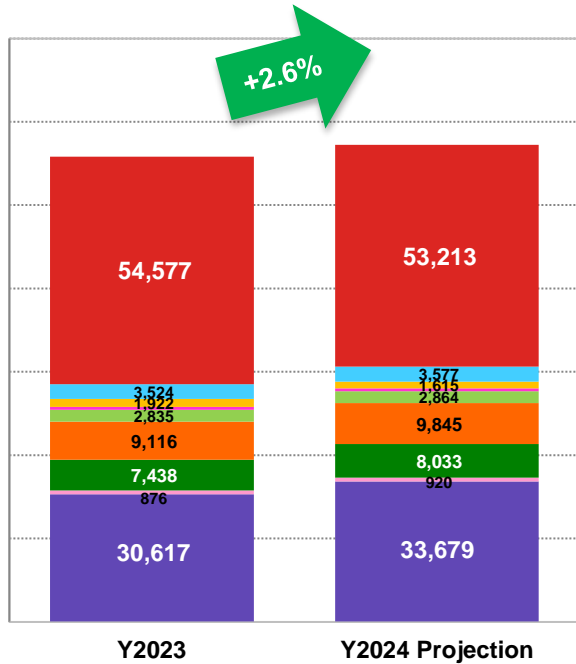
Source: Bangkok Post



true & dtac merger to offer speed +110% faster

Source: TechSource

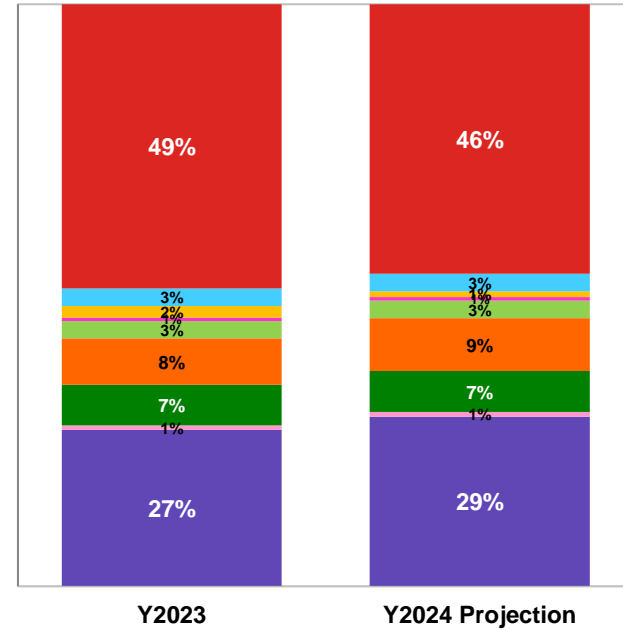
# Media Industry 2024 Projection



Million Baht

111,601

114,447



# Media Industry 2024 Projection

Advertising Spend by medium (Nielsen&DAAT)	2021 Jan-Dec		2022 Jan-Dec		% change	2023 Jan-Dec		% change	2024 Projection		% change
	Bt. M.	%	Bt. M.	%		Bt. M.	%		Bt. M.	%	
TV	56,474	56%	56,764	52%	1%	54,577	49%	-4%	53,213	46%	-2.5%
Radio	3,183	3%	3,264	3%	3%	3,524	3%	8%	3,577	3%	1.5%
Newspapers	2,455	2%	2,365	2%	-4%	1,922	2%	-19%	1,615	1%	-16.0%
Magazines	610	1%	640	0.6%	5%	695	0.6%	9%	702	0.6%	1.0%
Cinema (New disc%)	1,138	1%	2,466	2%	117%	2,835	3%	15%	2,864	3%	1.0%
Outdoor	5,999	6%	7,837	7%	31%	9,116	8%	16%	9,845	9%	8.0%
Transit	3,611	4%	6,394	6%	77%	7,438	7%	16%	8,033	7%	8.0%
In-Store	680	1%	901	0.8%	32%	876	0.8%	-3%	920	0.8%	5.0%
Internet (DAAT + 30% Key Platforms Direct)	27,599	27%	29,159	27%	6%	30,617	27%	5%	33,679	29%	10.0%
<b>Total</b>	<b>101,747</b>	<b>100%</b>	<b>109,790</b>	<b>100%</b>	<b>7.9%</b>	<b>111,601</b>	<b>100%</b>	<b>1.6%</b>	<b>114,447</b>	<b>100%</b>	<b>2.6%</b>

1.80%  
GDP

2.80%  
Forecasted GDP

# 2024 Media Inflation Projection

By Nannapat C.



# 2024 FORECAST TV INFLATION

- There are 2 factors to affect TV inflation Cost per rating point (CPRP)



## Formula

$$\frac{\text{TV Rate Change index}}{\text{TV Viewing Change index}} = \text{CPRP Index}$$

# 2024 FORECAST TV INFLATION

- The linear TV rates have increased while TV viewing has declined.

YEAR	RATE CHANGE INDEX	VIEWING CHANGE INDEX	CPRP INDEX	TV Inflation % change
2022	100.43	94.40	106	+6%
2023	100.70	94.73	106	+6%
<b>Forecast 2024</b>	103.5	95.43	108	<b>+8%</b>

Source: Nielsen viewing 7 months rolling comparison Jul – Jan 2021, 2022, 2023, 2024.  
Target M/F 4+ Nationwide



# 2024 MEDIA INFLATION

<b>MEDIUM</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
TV (CPRP)	3%	3%	3%	6%	6%	8%
PRINT	0%	0%	-4%	-5%	1%	0%
RADIO	0%	0%	0%	0%	0%	0%
CINEMA	0%	0%	0%	0%	0%	1%
OOH	10%	10%	0%	3%	9%	8%
DIGITAL	-	-	-	-	-	8%
<b>TOTAL*</b>	<b>3%</b>	<b>4%</b>	<b>3%</b>	<b>5%</b>	<b>6%</b>	<b>7%</b>

\* Total: 2019-2023 inflation includes only OFFLINE, weighted by media importance of estimate

# 2024 Media Trends