



**MAAAT**

MEDIA AGENCY ASSOCIATION OF THAILAND

# 2026 MEDIA INDUSTRY UPDATE

March 31, 2026; MS Teams



# AGENDA

9.50-10.00	Welcome to “2026 Media Industry Update”
10.00-10.10	2025 Advertising Expenditure
10.10-10.30	2026 Scenario and Trend
10.30-10.45	2026 Advertising Expenditure Projection
10.45-11.00	Q&A



# TEAM



ภวัต เรืองเดชวรชัย (โบ้)  
CEO MI Group,

**MAAT President**



จิณนารัชช์ สัมพันธ์รัตน์ (ต่าย)  
CCO, Omnicom Media  
Thailand

**MAAT Vice President**



ดร.สร เกียรติคุณารัตน์ (กอล์ฟ)  
CEO Initiative and BPN,  
Omnicom Media Thailand

**MAAT Vice President**



สุทธิลักษณ์ วงศ์วรเศรษฐ์  
(บู๊ย)  
Director, Data &  
Technology Intelligence,  
MI Group,

**MAAT Committee**



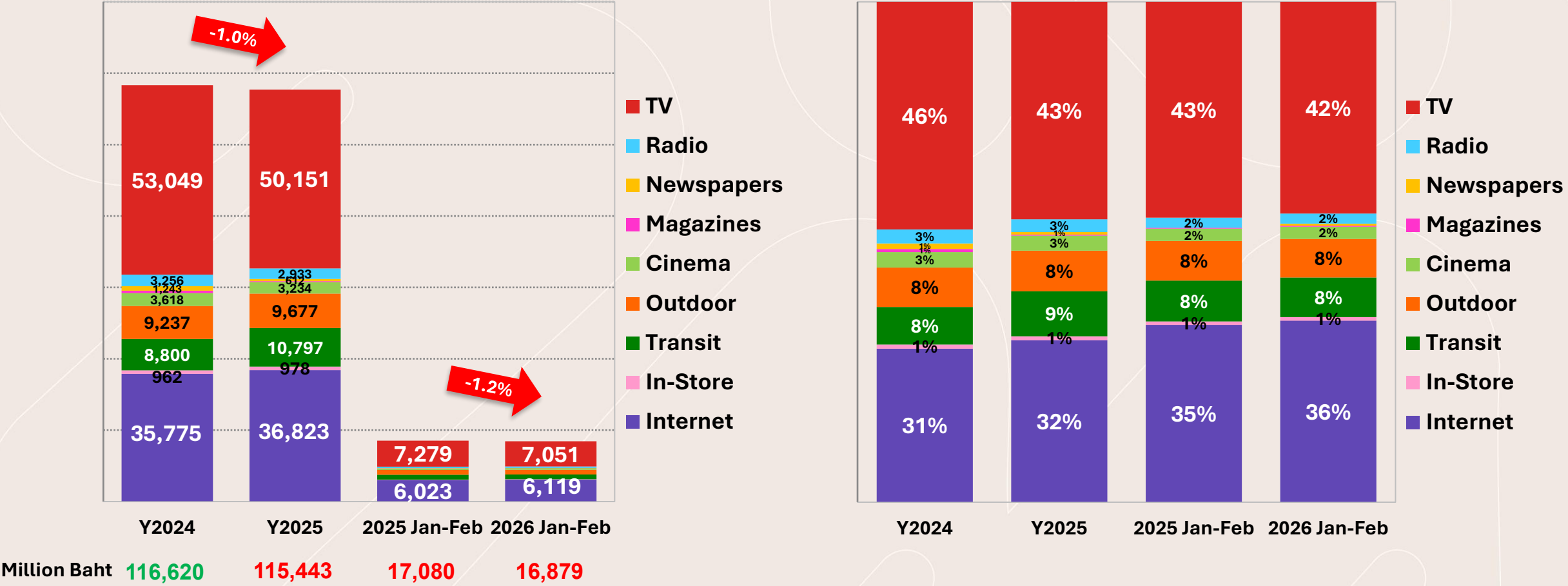
นันท์นภัส ไชตริตตะกาญจน์  
(อู๋ย)  
Head of Investment,  
Omnicom Media Thailand,

**MAAT Consultant**

# 2025 ADVERTISING SPENDING

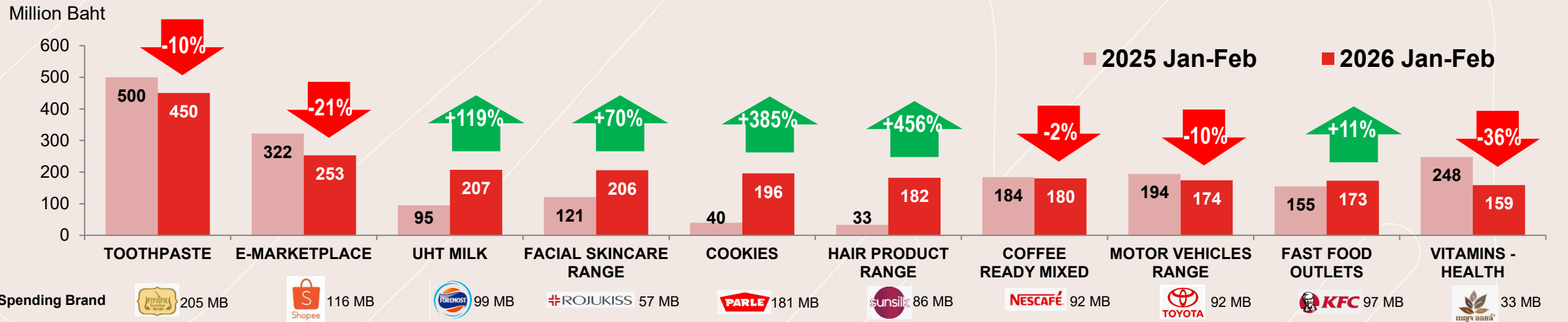
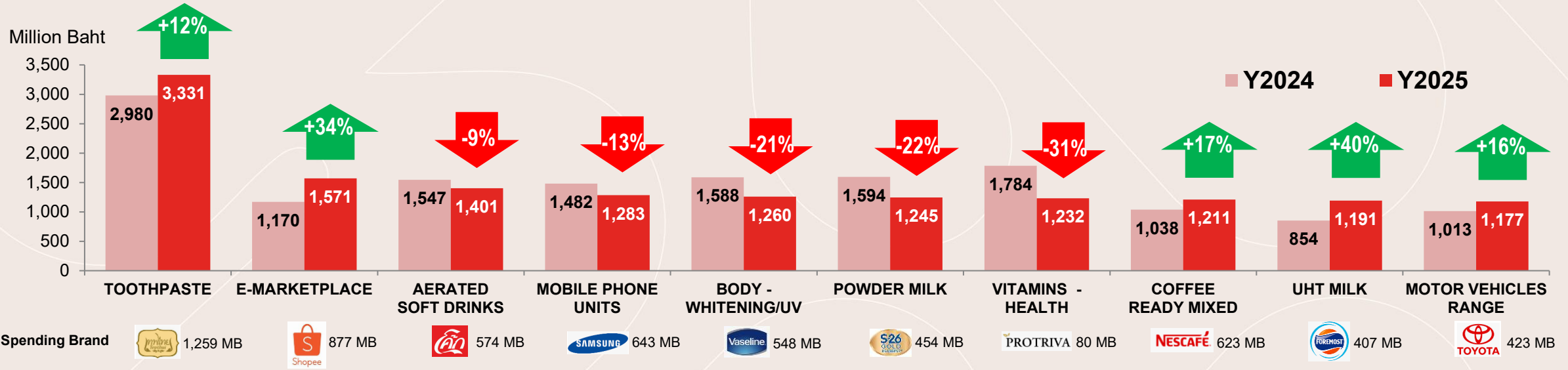


# ADEX 2024 vs 2025 and 2025 Jan-Feb vs 2026 Jan-Feb

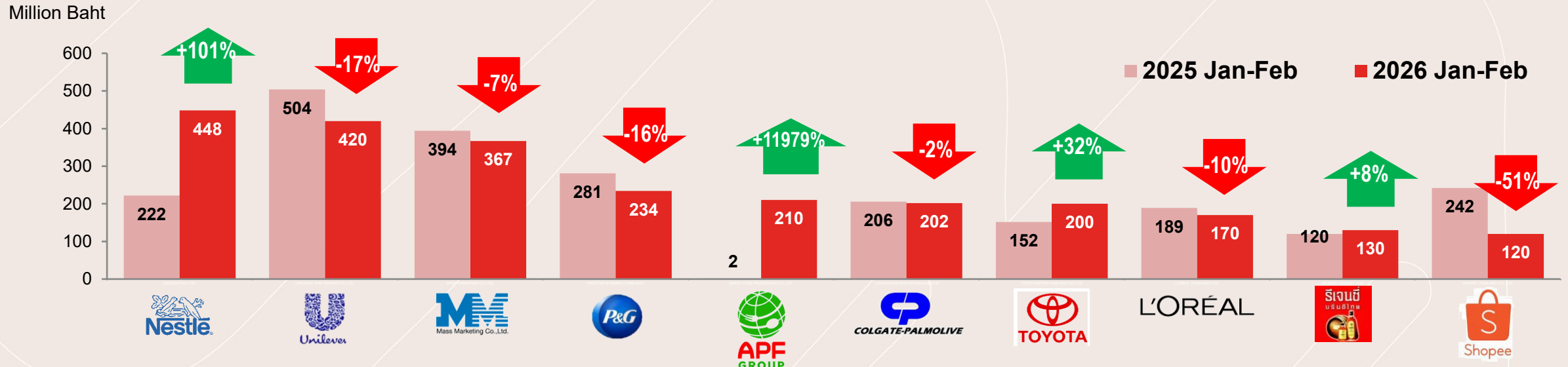
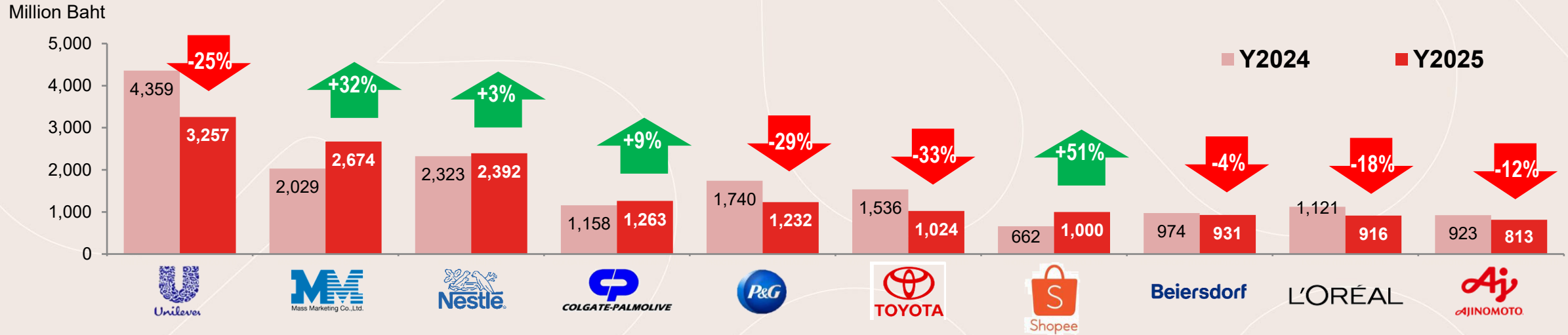


Source: The Nielsen Company, Excluded - Sections: CD/DVD, Classified, House Ads, No cost, Category: Advertising Agencies/ Direct Sale/ Sky Train, Underground Train Internet from DAAT Excluded Creative and Production and add 30% key platforms direct

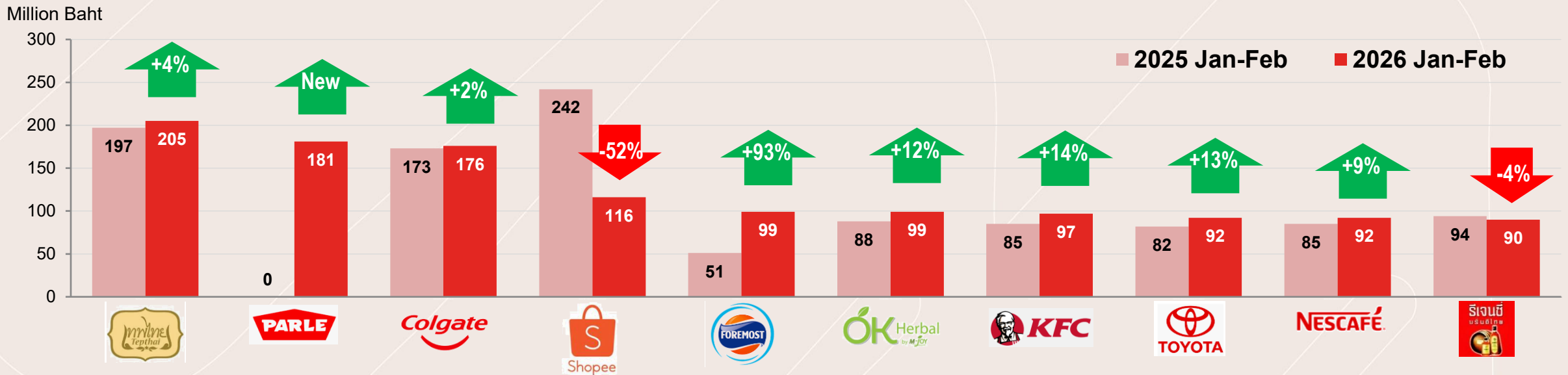
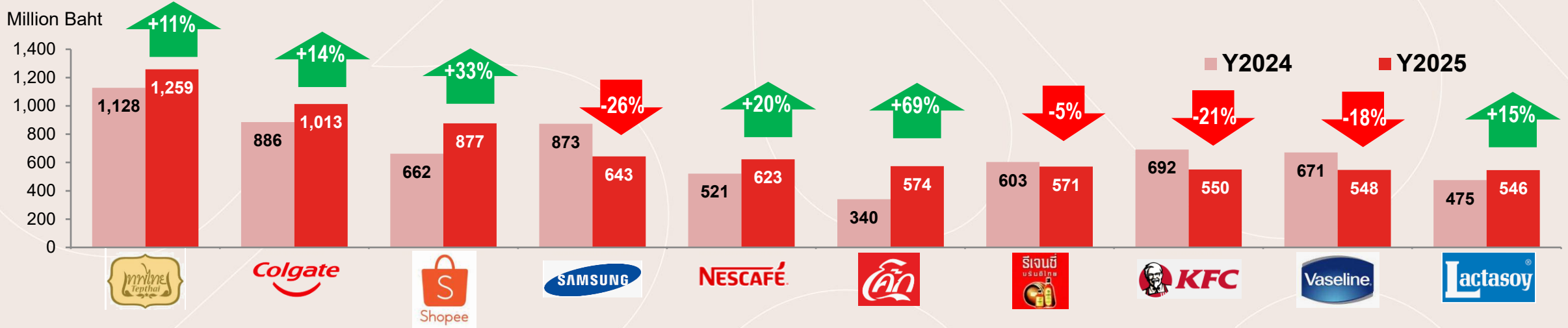
# Top 10 Categories



# Top 10 Advertisers



# Top 10 Brands





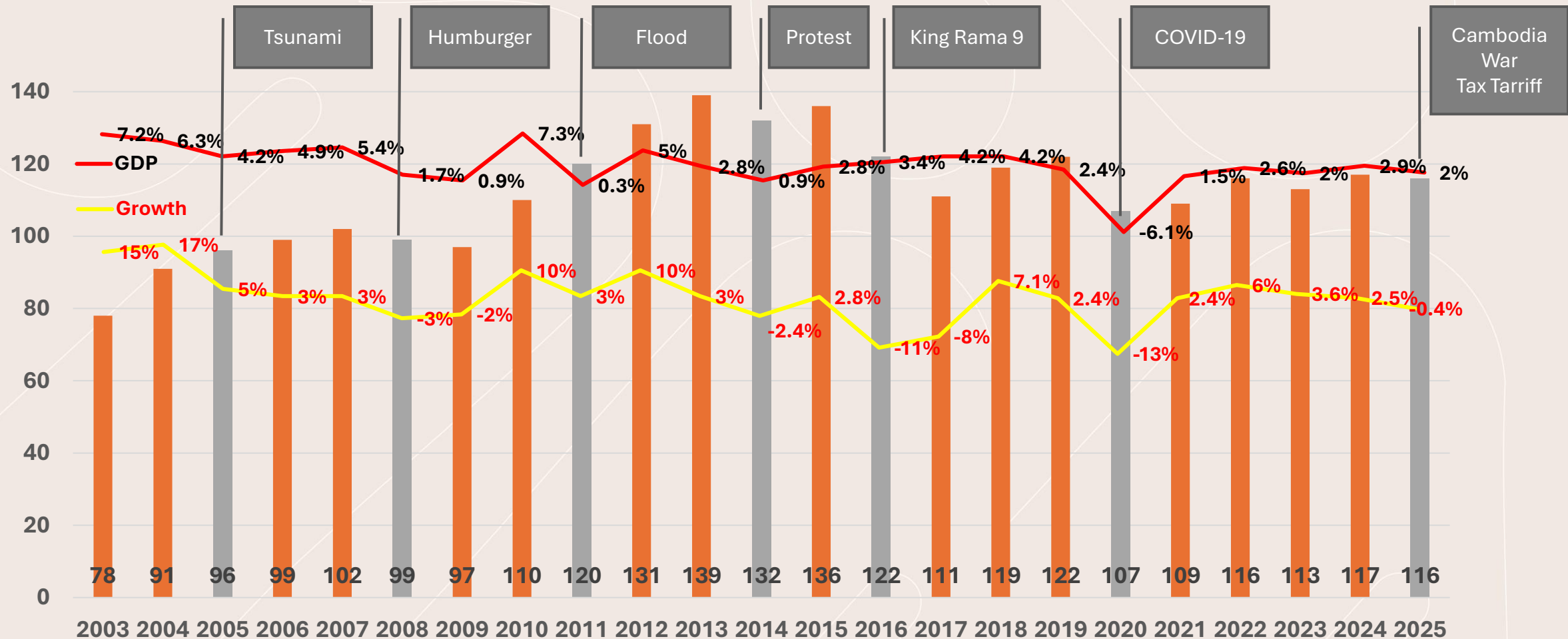
**MAAT**

MEDIA AGENCY ASSOCIATION OF THAILAND

# 2026 SCENARIO AND TREND



# Spending History



(Spending : Million Baht)

# 2026 SCENARIO AND TREND

1

2

3

4

# 2026 SCENARIO AND TREND

**GDP**

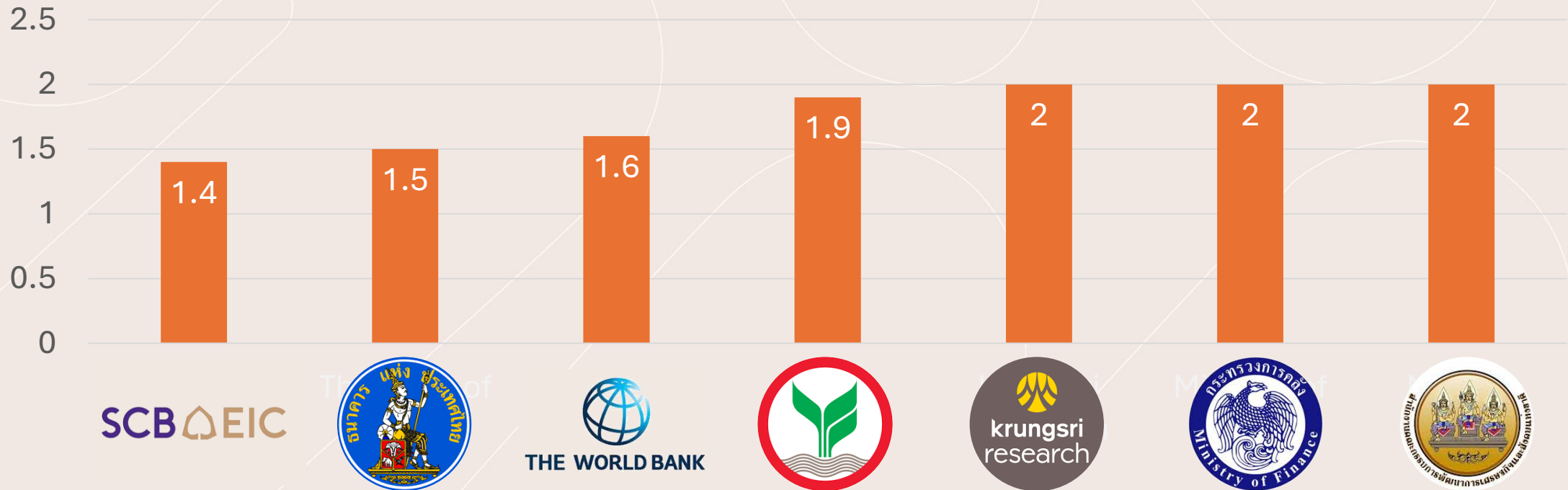
2

3

4

# 2026 GDP FORECAST

2026 GDP



# 2026 SCENARIO AND TREND

**GDP 2026**  
**1.4% - 2%**



**WAR**

3

4

**วิกฤต**  
ตะวันออกกลาง

TNN  
WORLD



**ราคาน้ำมัน-ก๊าซพุ่งอีก!**  
**อิหร่านโจมตีแหล่งก๊าซกาตาร์**  
ตอบโต้อิสราเอลโจมตีซาอุดีอาระเบีย

20 มี.ค. 2569 ภาพ: Reuters

NATION  
19 มี.ค. 69



WORLD

**อิหร่านถล่มคลังก๊าซ**  
กาตาร์-ซาอุดี เสียหายหนัก

THE STANDARD  
WEALTH

ขอภัยค่ะ  
ห้ามจอด  
ทุกชนิดจะ  
อยู่ในระหว่างรอ



STUF

Ch7HDNEWS  
กรุงเทพฯ



**ไรเดอร์โอด**  
น้ำมันบางปี่ขาด หวั่นกระทบงาน

เจาะลึกวิกฤต  
"น้ำมันขาดแคลน"  
หมอล่า-รศแห่

16 มี.ค. 69 Thai PBS



แนวหน้า

**สกัดวิกฤตน้ำมันขาดแคลน**  
เชิงร้ายสั่งด่วนใช้ 'แม่สายโมเดล' ย้ำคนไทยต้องมาก่อน

Facebook X YouTube Naewnanews - แนวหน้าออนไลน์ Instagram TikTok naewna\_online



# 2026 SCENARIO AND TREND

## GDP 2026

1.4 % - 2%

Ministry of Finance projects 2.0%  
Bank of Thailand projects 1.5%

Krungsri Research forecasts 1.8%  
SCB EIC forecasts 1.4%

World Bank forecasts 1.6%.

## WAR



## TRUST

4



# 2026 SCENARIO AND TREND

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## WAR



## TRUST



## LIFESTYLE SHIFT

# CONSUMER NOWADAYS: EMERGE OF AGING POPULATION



**18 %**  
**10,274,000**  
**Persons**



**32 %**  
**18,588,000**  
**Persons**



**50%**  
**28,288,000**  
**Persons**

**33.3 to 34.1 million** people in Thailand are aged 45 and older.  
(Source: กรมกิจการผู้สูงอายุ)



**14.39 %**  
**8,222,000**  
**Persons**



**22.61 %**  
**12,922,000**  
**Persons**



**63 %**  
**36,006,000**  
**Persons**

# SHIFTING FROM PASSIVE VIEWERS TO ACTIVE PARTICIPANTS

**> 5 Hrs.** spent time on screen per day (all screens)

**Gen Z**



More on online social media

**Gen Y**



Screen Stickiness

**Gen X**



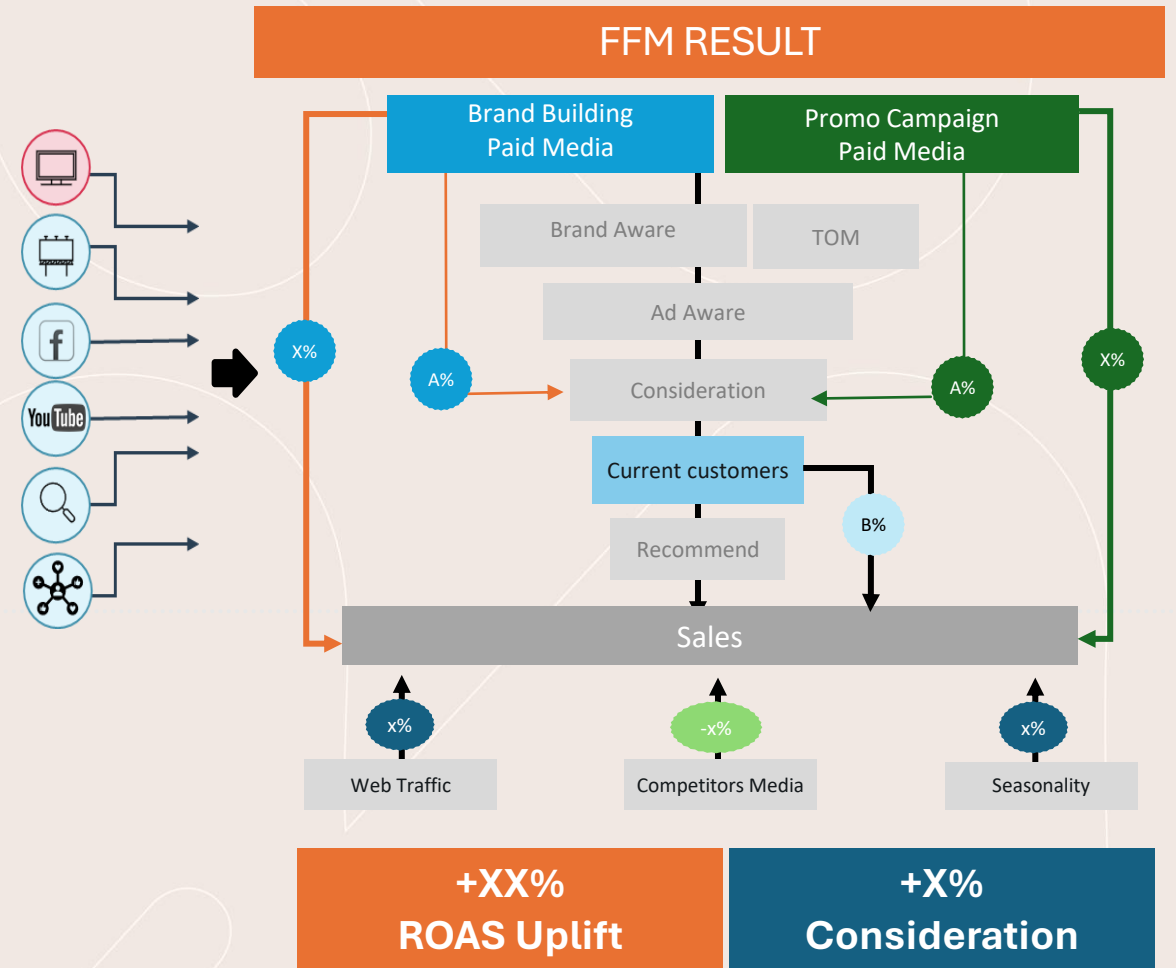
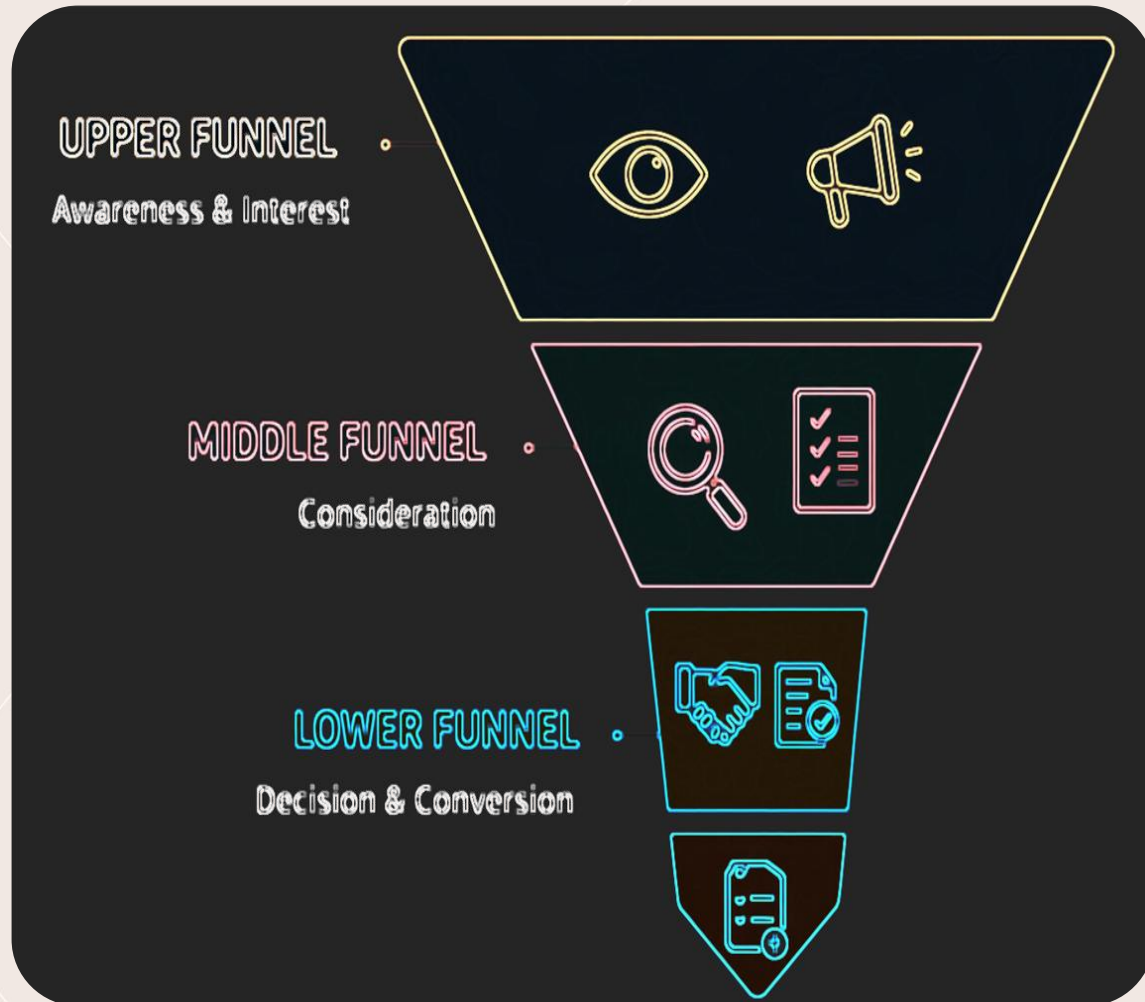
Heavy Live TV : 2.23Hrs.

Online & Social Media <small>Include streaming</small>	<b>99%</b>	<b>98%</b>	<b>86%</b> <small>(%consumption)</small>
	<b>5hrs 32mins</b>	<b>4hrs 57mins</b>	<b>3hrs 9mins</b> <small>(time spent per day)</small>
TV (Live & Online)	<b>71%</b>	<b>80%</b>	<b>85%</b> <small>(%consumption)</small>
	<b>1hrs 17mins</b>	<b>2hrs 11mins</b>	<b>2hrs 23mins</b> <small>(time spent per day)</small>
Total Screen Time Per Day	<b>6hrs 49mins</b>	<b>7hrs 8mins</b>	<b>5hrs 8mins</b> <small>(time spent per day)</small>
OOH Consumption	<b>71%</b>	<b>70%</b>	<b>50%</b>

Source: Nielsen Media Research (IMS)



# FULL FUNNEL PLANNING WITH OMICHANNEL MEDIA DRIVES BOTTOM-LINE



# 2026 SCENARIO AND TREND

## GDP 2026

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## WAR



## TRUST



## LIFESTYLE SHIFT



# 2026 ADEX PROJECTION



# ADEX PROJECTION SOURCES OF DATA



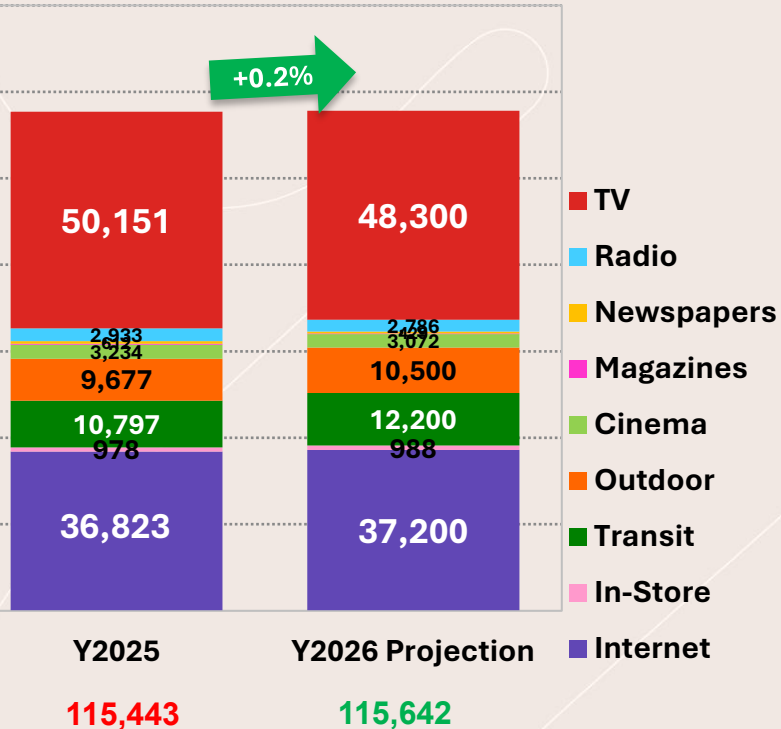
**TV, Radio, Print, OOH  
Cinema**



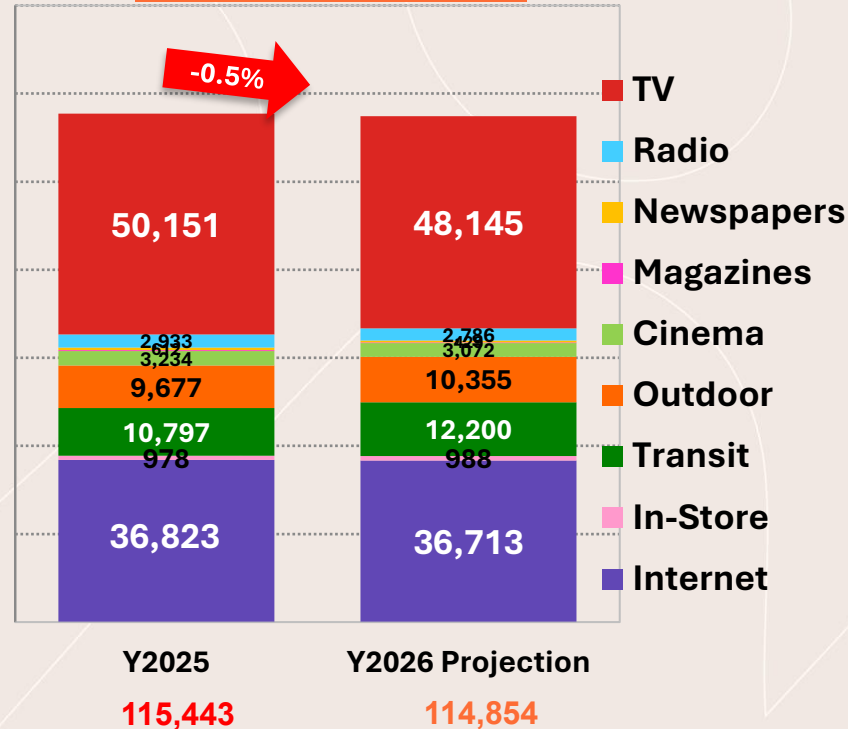
**Digital ADEX + forecast  
(30% key platforms direct)**

# 2026 ADEX PROJECTION : 3 SCENARIOS

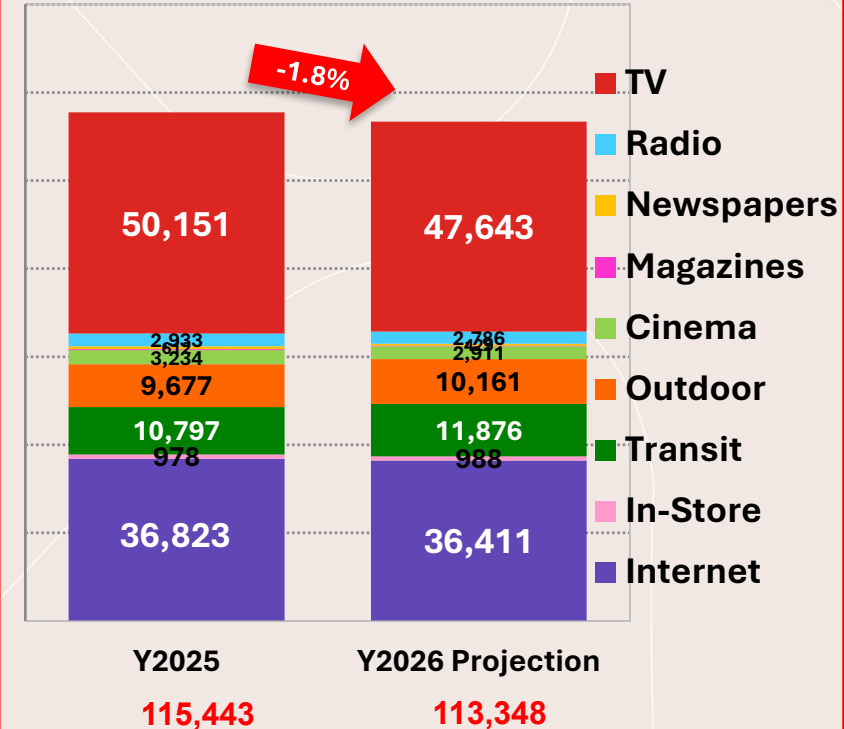
## Best Case



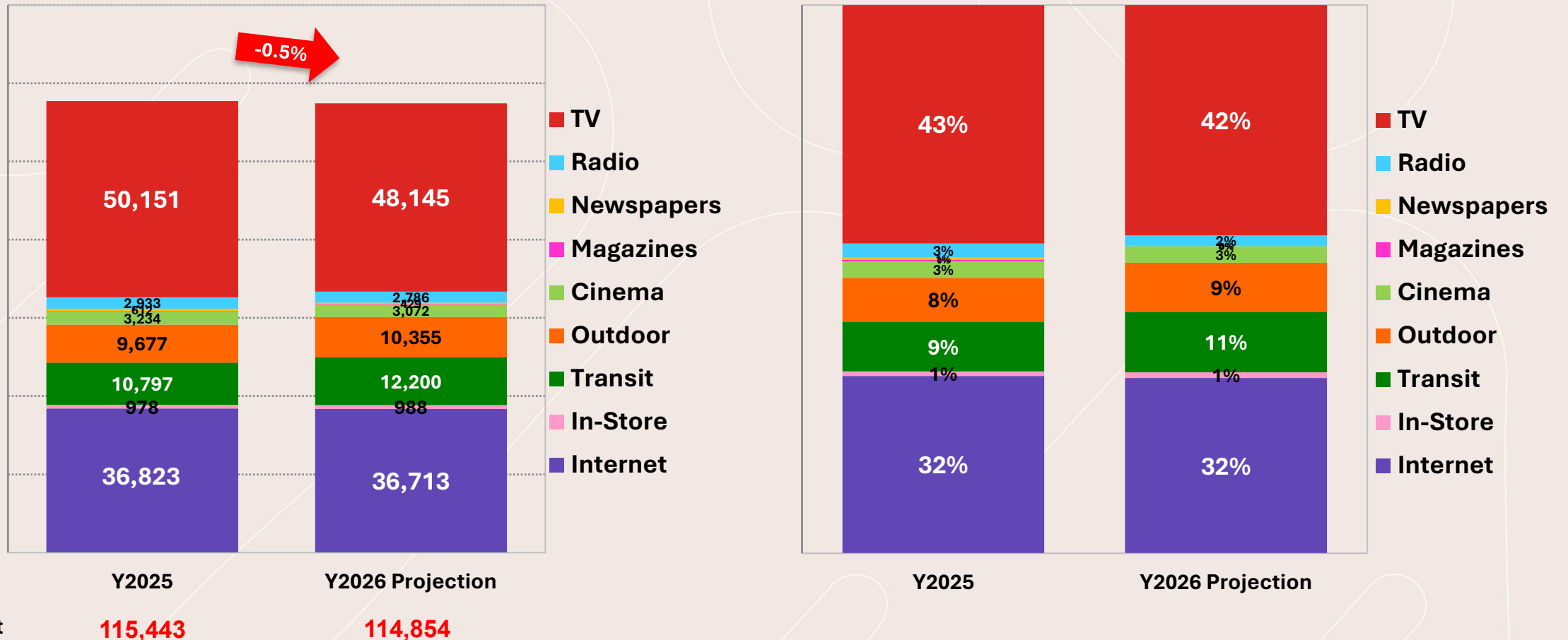
## More likely to be



## Worst Case



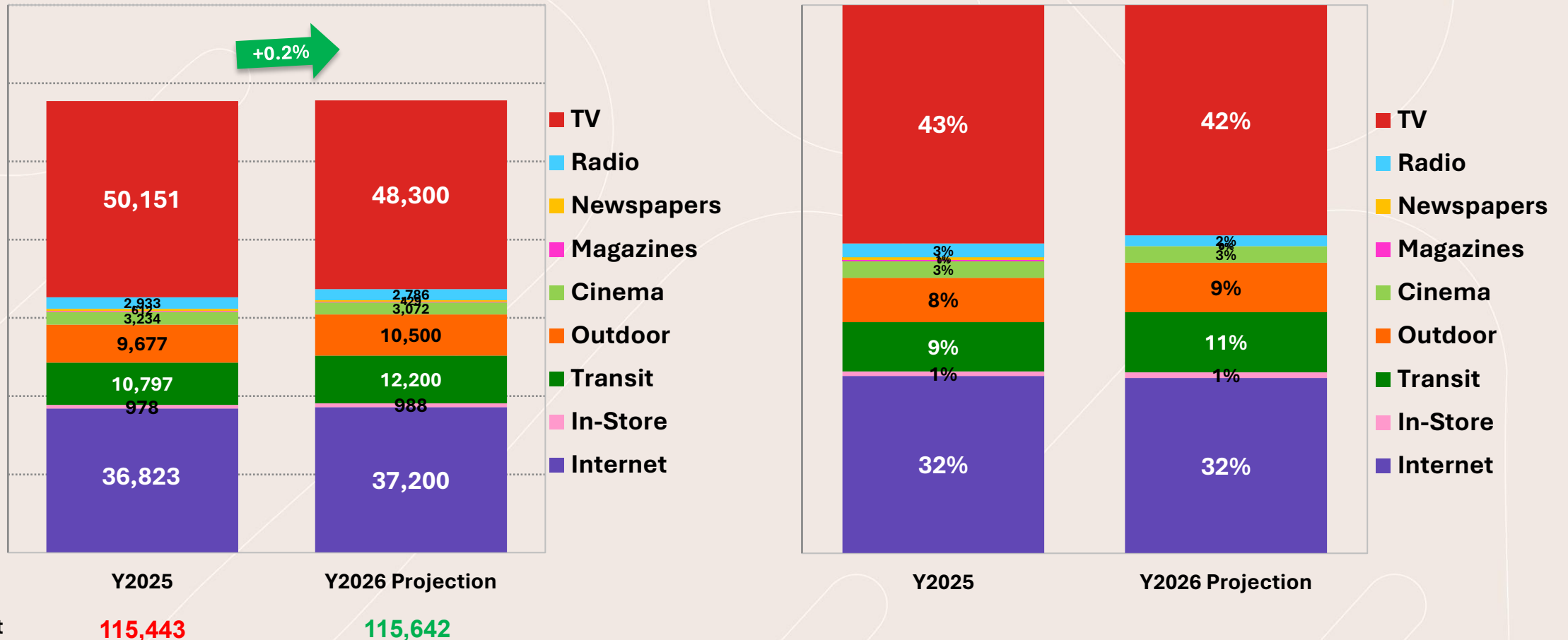
# 2026 ADEX PROJECTION : More likely to be



-0.5%

Remark : the **exclusion** of advertising spending in the **following Categories**: CD/DVD (musical & film products), Classified, House ads. No Cost, Advertising agencies/digital marketing, Direct sales/Home shopping, Sky Train, Underground Train  
 DAAT : The **exclusion of "Creative and Production costs"**

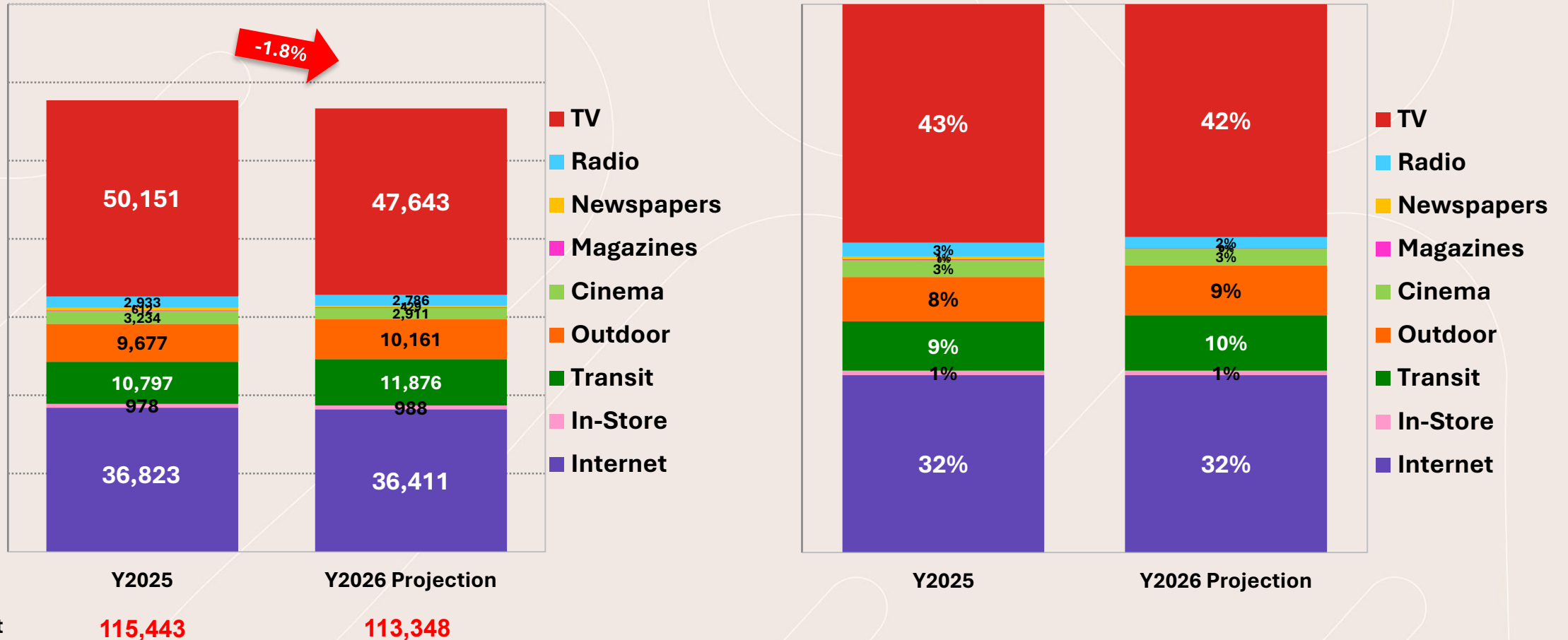
# 2026 ADEX PROJECTION : Best Case



Remark : the **exclusion** of advertising spending in the **following Categories**: CD/DVD (musical & film products), Classified, House ads. No Cost, Advertising agencies/digital marketing, Direct sales/Home shopping, Sky Train, Underground Train

DAAT : The **exclusion of "Creative and Production costs"**

# 2026 ADEX PROJECTION : Worst case



Remark : the **exclusion** of advertising spending in the **following Categories**: CD/DVD (musical & film products), Classified, House ads. No Cost, Advertising agencies/digital marketing, Direct sales/Home shopping, Sky Train, Underground Train  
 DAAT : The **exclusion of "Creative and Production costs"**

# 2026 ADEX PROJECTION

Advertising Spend by medium (Nielsen&DAAT)	2024 Actual			2025 Actual			2026 Projection (More Likely To Be)			2026 Projection (Best Case)		2026 Projection (Worst Case)			
	2024 Jan-Dec		% change	2025 Jan-Dec		% change	2026 Projection		% change	2026 Projection		% change	2026 Projection		% change
	Bt. M.	%		Bt. M.	%		Bt. M.	%		Bt. M.	%		Bt. M.	%	
TV	53,049	45%	-3%	50,151	43%	-5%	48,145	42%	-4%	48,300	42%	-4%	47,643	42%	-5%
Radio	3,256	3%	-8%	2,933	3%	-10%	2,786	2%	-5%	2,786	2%	-5%	2,786	2%	-5%
Newspapers	1,243	1%	-35%	612	1%	-51%	429	0%	-30%	429	0%	-30%	429	0%	-30%
Magazines	680	0.6%	-2%	237	0.2%	-65%	166	0%	-30%	166	0%	-30%	142	0.1%	-40%
Cinema	3,618	3%	28%	3,234	3%	-11%	3,072	3%	-5%	3,072	3%	-5%	2,911	3%	-10%
Outdoor	9,237	8%	1%	9,677	8%	5%	10,355	9%	7%	10,500	9%	8%	10,161	9%	5%
Transit	8,800	8%	18%	10,797	9%	23%	12,200	11%	13%	12,200	11%	13%	11,876	10%	10%
In-Store	962	0.8%	10%	978	0.8%	2%	988	1%	1%	988	1%	1%	988	0.9%	1%
Internet (DAAT + 30% Key Platforms Direct)	35,775	31%	9%	36,823	32%	3%	36,713	32%	-0.3%	37,200	32%	1.0%	36,411	32%	-1.1%
<b>Total</b>	<b>116,620</b>	<b>100%</b>	<b>2.5%</b>	<b>115,443</b>	<b>100%</b>	<b>-1.0%</b>	<b>114,854</b>	<b>100%</b>	<b>-0.5%</b>	<b>115,642</b>	<b>100%</b>	<b>0.2%</b>	<b>113,348</b>	<b>100%</b>	<b>-1.8%</b>

2.9%  
NESDC GDP

2.4%  
NESDC GDP

1.5% – 2.5%  
NESDC Forecasted GDP

Remark : the **exclusion** of advertising spending in the **following Categories**: CD/DVD (musical & film products), Classified, House ads. No Cost, Advertising agencies/digital marketing, Direct sales/Home shopping, Sky Train, Underground Train

DAAT : The **exclusion of "Creative and Production costs"**

# 2026 MEDIA INFLATION PROJECTION

The image features a background with a color gradient from red on the left to light blue on the right. In the bottom right corner, there is a white line-art graphic consisting of several overlapping, rounded shapes that resemble stylized letters or abstract forms.

# 2026 TV INFLATION PROJECTION

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

## Formula

$$\frac{\text{TV Rate Change index}}{\text{TV Viewing Change index}} \times 100 = \text{CPRP Index}$$



**TV INFLATION**

Example:

TV rate increase 5% (index 105) and TV viewing decline 3% (index 97)

$$\frac{105}{97} \times 100 = 108.2$$

# 2026 TV INFLATION PROJECTION

- 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	94	106	+6%
2023	101	95	106	+6%
2024	103	95	108	+8%
2025	100	93	108	+8%
<b>2026</b>	<b>102</b>	<b>97</b>	<b>105</b>	<b>+5%</b>

Source: Nielsen viewing 7 months rolling comparison Jul – Jan 2021, 2022, 2023, 2024, 2025, 2026

Target M/F 4+ Nationwide

# 2026 TOTAL MEDIA INFLATION

MEDIUM	2019	2020	2021	2022	2023	2024	2025	2026
TV (CPRP)	3%	3%	3%	6%	6%	8%	8%	5%
PRINT	0%	0%	-4%	-5%	1%	0%	0%	0%
RADIO	0%	0%	0%	0%	0%	0%	0%	0%
CINEMA	0%	0%	0%	0%	0%	1%	0%	0%
OOH	10%	10%	0%	3%	9%	8%	8%	6%
DIGITAL	-	-	-	-	-	8%	8%	6%
<b>TOTAL*</b>	3%	4%	3%	5%	6%	7%	7%	<b>5%</b>

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

Q&A



THANK YOU

