Social & Media Changes in the Age of Disruptive Technology
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Orasri Srirasa
Digital Broadcasting Bureau, Office of NBTC

Digital Broadcasting and Trends
Megatrend Technology

HIS: 75 billion Devices in 2025

AI

Cyber Security
**ICT Development Index (IDI) 2017**

**Thailand Ranking #10 in ASP**


**NBTC:** *Penetration Rate per Household*

<table>
<thead>
<tr>
<th>Economy</th>
<th>Fixed-telephone subscriptions per 100 inhabitants</th>
<th>Mobile-cellular subscriptions per 100 inhabitants</th>
<th>Percentage of households with computer</th>
<th>Percentage of households with Internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thailand</td>
<td>7.0</td>
<td>7.0</td>
<td>152.7</td>
<td>172.6</td>
</tr>
</tbody>
</table>

**Q4-2017: Fixed Line 8.21 million sub (38%*)**

**Q4-2017: MBB 68.35 million sub (103%)**

**UNCS Disclaimer:**

Global: 4.02 billion use internet (53%), 3.19 billion use Social Media (42%)
ASEAN: Internet penetration rate 58%, Social Media penetration rate 55%

- Thailand usage:
  - Facebook: 3.6 billion users.
  - Digital penetration: 53%.
  - Active social media users: 32 million.

- Average time spent:
  - Media: 9h 38m
  - Social media: 3h 10m
  - Video: 4h 03m
  - Music: 1h 35m

- Top advertising media:
  - TV: #1
  - Online: #2

- Facebook usage in Thailand: Most used social media platform.

Advertising expense on Broadcasting decrease.

<table>
<thead>
<tr>
<th>Year</th>
<th>Digital Advertising Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>2555</td>
<td>2,783</td>
</tr>
<tr>
<td>2556</td>
<td>4,248</td>
</tr>
<tr>
<td>2557</td>
<td>6,115</td>
</tr>
<tr>
<td>2558</td>
<td>8,084</td>
</tr>
<tr>
<td>2559</td>
<td>9,883</td>
</tr>
</tbody>
</table>

Digital ADEX 2559 : 9,883 million THB

Source: DAAT, Time Consulting
History of TV Broadcasting in Thailand: 60 years to DTTB

HHs Penetration: 57% DTT in Y2017

TV Audience: 88% Terrestrial TV

Top 10 TV Rating: Apr2018

Source: Office of NBTC, NSO, Nielsen
10. Strengthen the well understanding between government and citizen. Also, Strengthen the well understanding between parliament and citizen.

11. Advocating in term of the contributing and educating population about democratic form of government with the King as Head of State.

12. Servicing an beneficial information to disabilty persons or less opportunity persons.

5. Knowledge, Education, Science, Technology and Environment

6. Religion, Art & Culture, Agriculture and Occupational Development and promotion

7. Health Sanitation Sport and promoting quality of people life

8. State Security

9. Public Safety
Network Rollout Obligation: 95% HHs coverage within 4 years: 39 main sites + 129 additional Sites (168 sites in total) **Completed.**

ASO: 5 ATV channels (Ch5, Ch7, Ch9, Ch11, TPBS) plan to switch Off all ATV sites by **Jul 2018.**

<table>
<thead>
<tr>
<th>ATV Channel</th>
<th>ASO Plan (2015-2018)</th>
<th>ATV Sites</th>
<th>Switch Off status (as of Mar 2018)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>249</td>
<td>112 (45%)</td>
</tr>
<tr>
<td>Ch5</td>
<td>2018</td>
<td>41</td>
<td>8</td>
</tr>
<tr>
<td>Ch7</td>
<td>2018</td>
<td>37</td>
<td>17</td>
</tr>
<tr>
<td>Ch9</td>
<td>2018</td>
<td>36</td>
<td>-</td>
</tr>
<tr>
<td>Ch11</td>
<td>2018</td>
<td>50</td>
<td>38</td>
</tr>
<tr>
<td>TPBS</td>
<td>2018</td>
<td>52</td>
<td>49</td>
</tr>
<tr>
<td>Ch3</td>
<td>Concession 2020</td>
<td>33</td>
<td>-</td>
</tr>
</tbody>
</table>

Source: NBTC
DSO Communication Strategy

DSO Commutation Implementation: Integrated marketing communications (IMC)

- Communicate on various channels; TV, Radio, SMS, Newspaper, On-Line and Social Media (https://www.facebook.com/digialtv.nbtc), DTV Web site (http://digital.nbtc.go.th), Events & Exhibitions, DTV Road show, Project DTV4All, All4DTV, DTV Guide
- Create media and national message and handbook for promoting DSO
- Implementing Coverage Checker on web and Mobile/Tablet Applications
- Build community, local administration to promote DTV
- Cooperate with Universities, Network Operators, DTV manufactures to support DTV installation
- Cooperate with DTV broadcasters, telecom operators to promote DTV
- Encourage high rise building (apartment, condominium) to install DTV antenna

DSO Global status

53 Countries Completed, ASEAN agreed to compete ASO in 2020

53 Countries Completed DSO
(5 Countries in ASP)
74 Countries Ongoing

System: DVB-T2, 43%


Source: NBTC
Radio Broadcasting in Target Radio User/Behavior

By Device
1. 특정 텀플레이시온리스 버튼
2. 특정 텀플레이시온리스 버튼
3. 지방 텀플레이시온리스 (버튼/고급옵션모음)
4. 지방 텀플레이시온리스 (버튼/고급옵션모음)
5. 일일 텀플레이시온리스 (버튼/고급옵션모음)
6. 주간 텀플레이시온리스 (버튼/고급옵션모음)
7. 이벤트 (버튼/고급옵션모음)

By Content
1. 광고
2. 뉴스/정보
3. 연예
4. 음악
5. 스포츠
6. 교육
7. 교육
8. 교육

AM 193 Stations
FM 313 Stations
FM trial 5,730

Main Radio Station
Trial Radio Station (Temporary)

Listen 669 mins. /wk

Radio Listener
Listen Radio 46.27%

Source: NBTC, Survey 2559
Advantage of Digital Radio Broadcasting

- Good Audio Quality, Reduce interference
- Introduce New Services: Audio, Text, Image, Data, Slide-Show, Traffic Information, PAD, EPG (Electronic Program Guide)
- Support Disaster Warning, People with Disabilities
- Support National Services, Pop-Up Service
- Spectrum: Frequency Efficiency
- Eco-System, Green Environment
- Interactive Services (Hybrid Radio)

Station List/Traffic Report

Slide Shows/Ads./EPG
Connect to Social Network
Digital Radio Services  Global Status Deployment Plan in Thailand

**Coverage Target:** 80% (90 sites)

Start trial in some cities with high population e.g. BKK, Chaingmai, Konkaen, Songkla, NakornSithamarat

Estimated Economic Impact (15 years):
GDP 24,676 million Bath (0.25%)

Source: NBTC

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**DAB GLOBAL STATUS**

- **470,000,000** People now able to receive DAB services
- **68,000,000** DAB receivers sold to December 2017, including automotive
- **2,266** DAB services now on air around the world
- **41** Countries with DAB services on-air
- **20,000,000** Automotive DAB receivers sold to December 2017, including after-market and factory fit
- **103** Members of WorldDAB, covering the full radio and broadcast ecosystem

**Source:** WorldDAB

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**Thailand Digital Economy and Society Development Plan (2016-2020) Strategy No. 1 Develop digital infrastructure**

Target: Deploying Digital TV and Digital Radio broadcasting services cover nationwide, providing Digital Radio broadcasting services with in 3 years

Source: NBTC
Traditional Pay TV

- **True visions** remains the company that has most influenced the shape of the Pay TV industry.
- In the long term, pay TVs could be eroded by OTT TV.

Market size 8,649 Million THB

Subscription OTT TV

- Rapid growth in market size
- Netflix, iflix, and HOOQ are the three main players in Thai OTT TV Market.

OTT TV Market Landscape in Thailand

- **OTT TV from Independent Provider**
  - Local OTT TV
    - CH7: Web & application
    - HOLLYWOOD TV
    - DOOGEE
    - primetime
  - Global/Regional OTT TV
    - HOOQ
    - iflix
    - LINE TV
    - YouTube

- **OTT TV from Local Free TV Provider**
  - Mono
    - Web & application
    - www.ch7.com/th/three.html
    - Ch7, Live CH7
  - One
    - Web & application
    - http://www.onehd.net/
  - CH8
    - Web & application
    - https://www.thach8.com/

- **OTT TV from Telco Provider**
  - AIS Play:
    - As a feature for AIS PlayBox customers
    - Offer exclusive contents i.e. GMM Bravo, Kik-Doo Tan Ngao Seang
    - Act as a application portal for HOOQ, Doonoo, etc.

- **OTT TV from Pay TV Provider**
  - True Visions Anywhere:
    - Launched as a feature for TrueVisions customer in 2016
    - Currently added SVoD (starts at 1GB/m) and TVoD packages for customers who want to watch only via the application.

Source: Time Consulting
Sony, Oculus, Microsoft, Google, and others have recently released low-cost headsets.
Statista forecasts that the global market size of the VR and AR markets in 2018 is **US$17.8 billion**.
Opportunity and Challenges

- Disruptive Technology
- ADEX decrease
- Over the top (OTT) (New Entrants, OTT box)
- Regulation (Competition, Convergence Licensing, Protect Local Content)
- Audience Research/Measurement
- Content (Local, Creative, Segment/Personalize, Multi-screen/Multi-Platforms)
- Expand to Regional/International Market
- Megatrend Technology
- AVOD, SVOD
- VR/AR (Enhance User Experience)
- Innovation (Product, Process)

6 pillars of digital transformation

Daniel Newman: CEO Broadsuite Media Group
Thank you

Ms. Orasri Srirasa, orasri_sr@hotmail.com
Division Director of Digital Broadcasting Bureau
Office of NBTC