



มุมมอง และ ความท้าทาย ของอุตสาหกรรมสื่อต่อผลกระทบจาก DISRUPTIVE TECHNOLOGY

NOVEMBER 29, 2018

SO SOFTEL HOTEL BANGKOK



THAWATCHAI JITTRAPANUN

**COMMISSIONER
THE NATIONAL BROADCASTING AND
TELECOMMUNICATION COMMISSION**

A short horizontal line with a teal-to-orange gradient.

5G and its disruption on Media & Entertainment



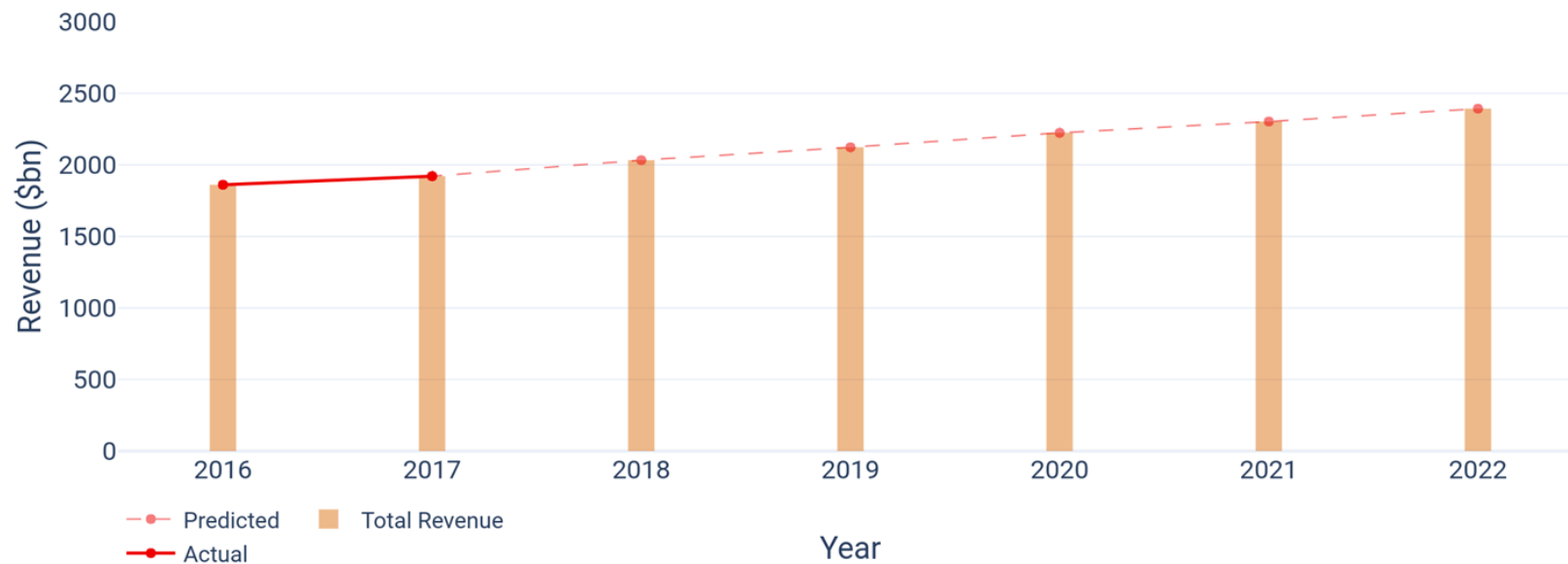
THAWATCHAI JITTRAPANUN

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Overview

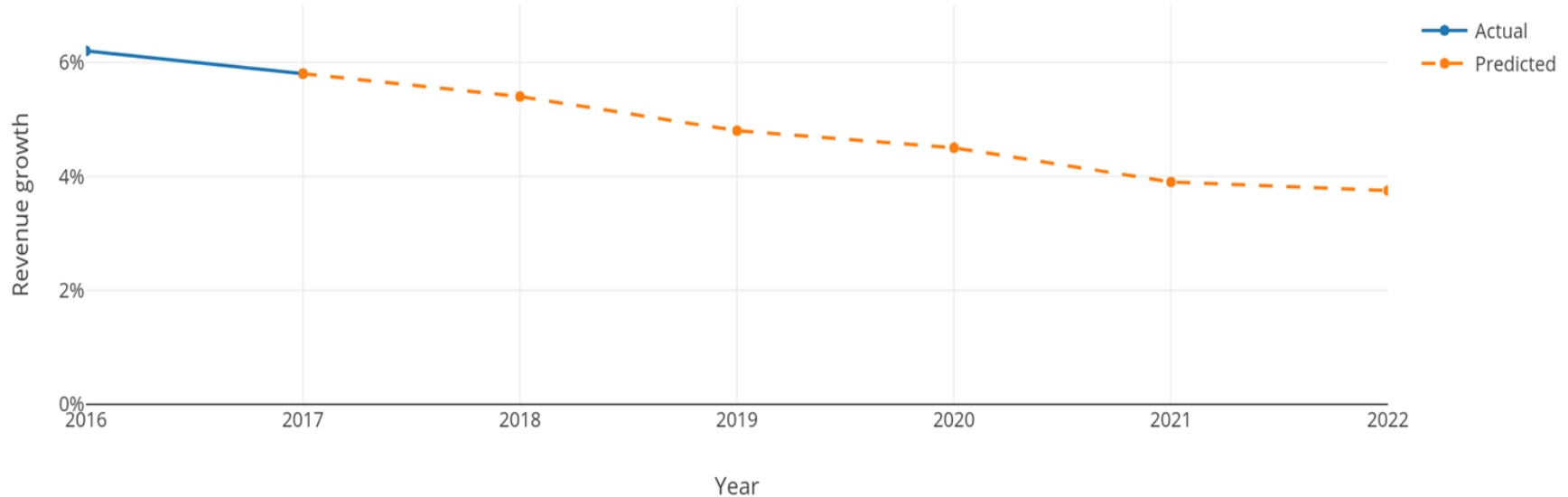
Media and Entertainment Revenue in Billion USD



Source: Perspectives from the global entertainment & media outlook 2018 - 2022, PwC, Ovum

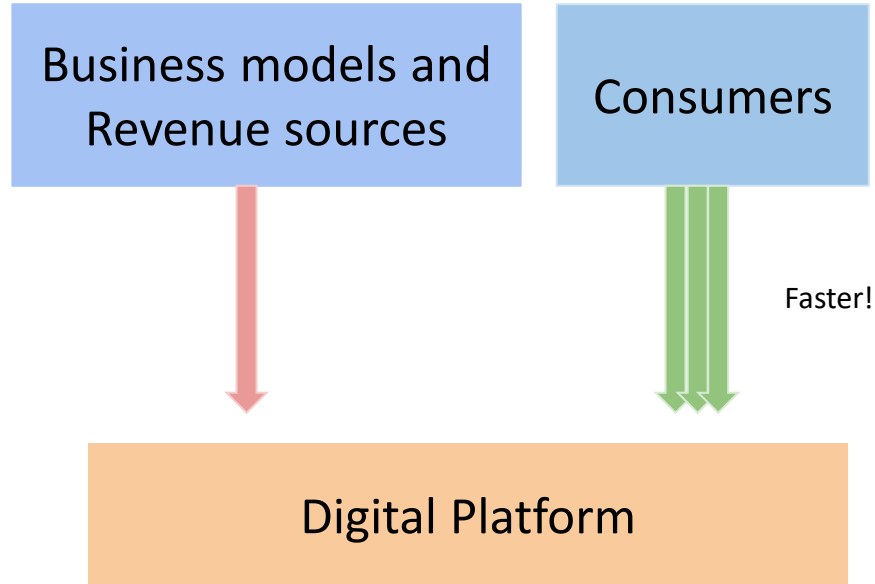
The industry is growing yet in a slower pace

Year-on-year total media & entertainment revenue growth

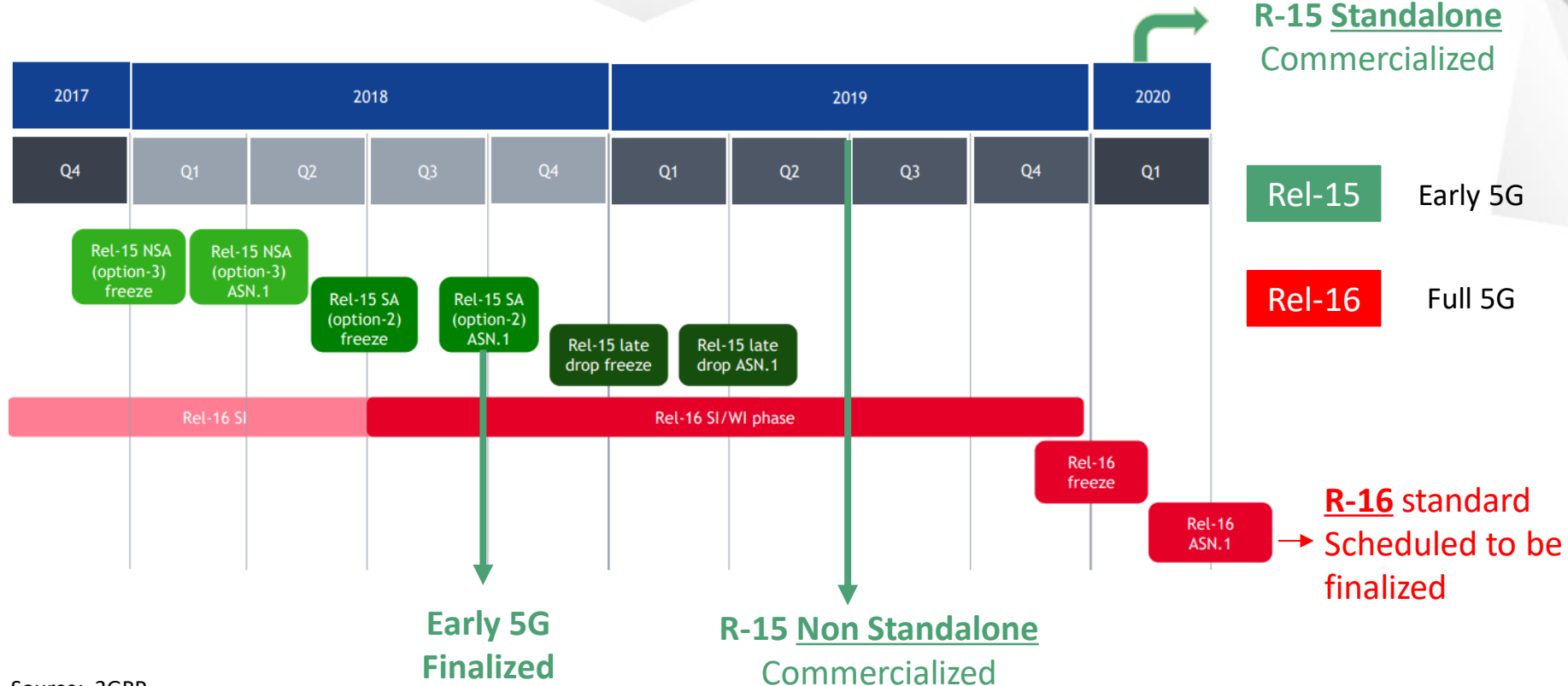


Source: Perspectives from the global entertainment & media outlook 2018 - 2022, PwC, Ovum

Users are moving fast

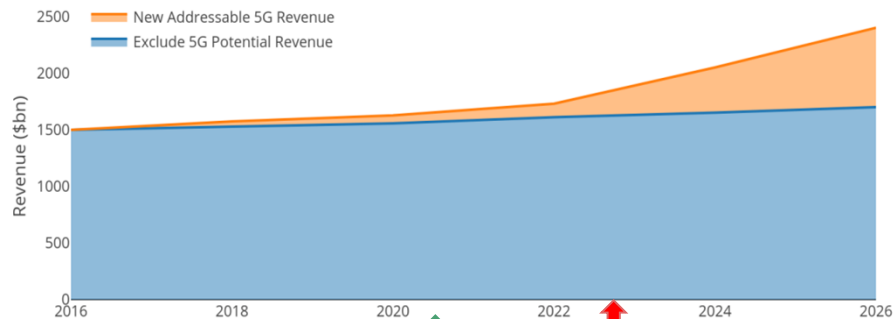


5G Timeline



Telecommunications Outlook

Telecommunications Revenue



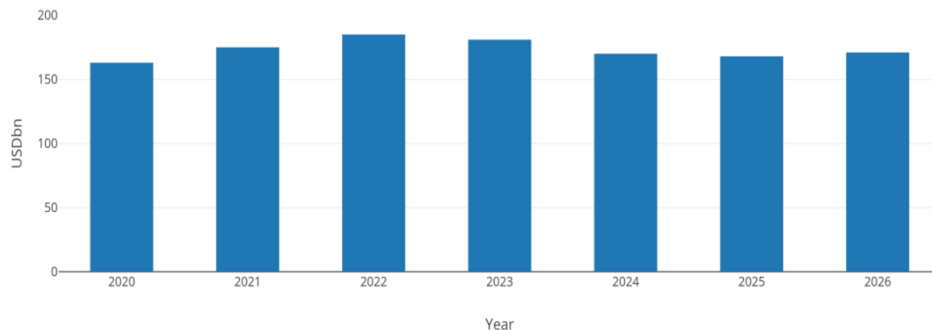
Early 5G commercialized



Full 5G commercialized

Contribute 1,233 \$bn by 2026

Net Contribution of 5G to Global Growth



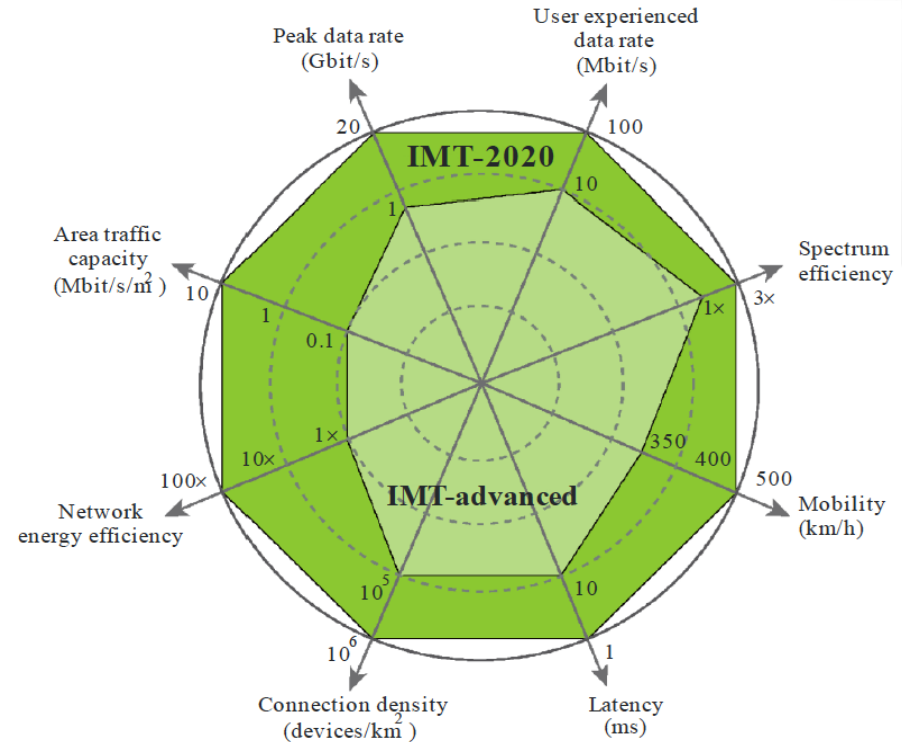
And roughly add 7% to the overall GDP growth rate

Source 1: Ericsson and Arthur D. Little, "The 5G Business Potential"

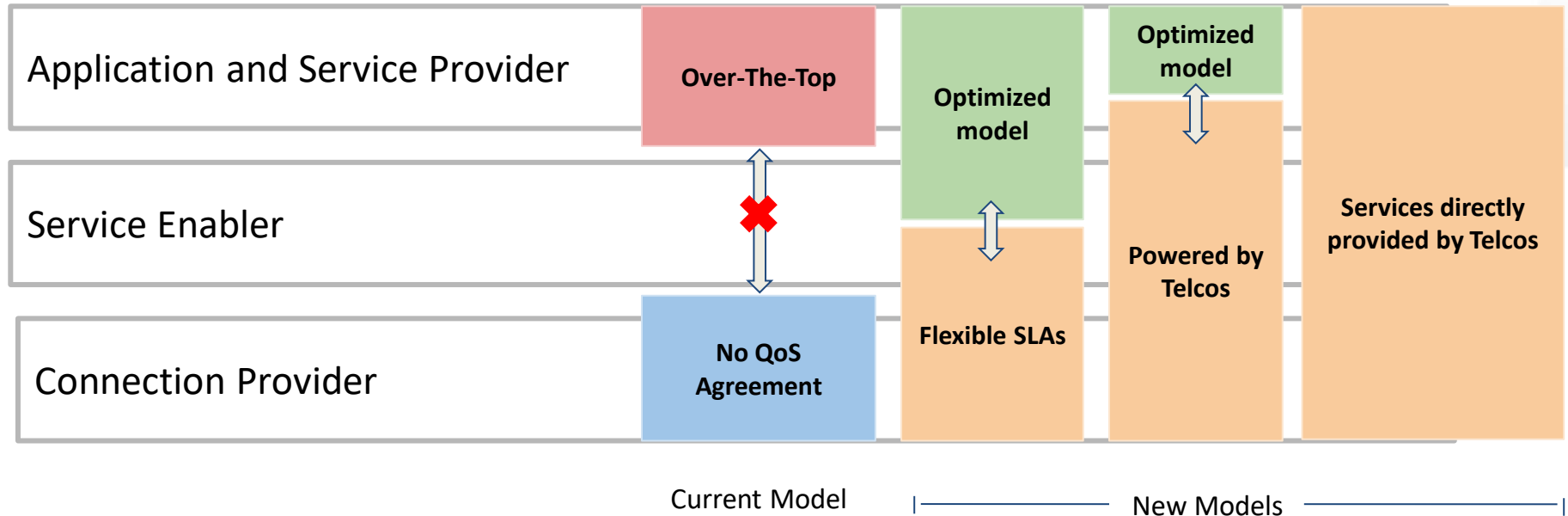
Source 2: IHS, "The 5G economy: How 5G technology will contribute to the global economy"

5G Capability

- Higher speed commercializes large volume content
- Better responsiveness allows more interactive services
- IoT enables customer-centric innovation
- Network slicing allows a tailor-made individual service



Telcos start integrating into other sectors



Capability and Network Slicing enable more flexible opportunity

FACTORIES OF THE FUTURE

- 1 Time-critical process control
- 2 Non time-critical factory automation
- 3 Remote control
- 4 Intra/Inter-enterprise communication
- 5 Connected goods

ENERGY

- 1 Grid access
- 2 Grid backhaul
- 3 Grid backbone

e-HEALTH

- 1 Assets and interventions management in Hospital
- 2 Robotics
- 3 Remote monitoring
- 4 Smarter medication

MEDIA & ENTERTAINMENT

- 1 Ultra High Fidelity Media
- 2 On-site Live Event Experience
- 3 User/Machine Generated Content
- 4 Immersive and Integrated Media
- 5 Cooperative Media Production
- 6 Collaborative Gaming

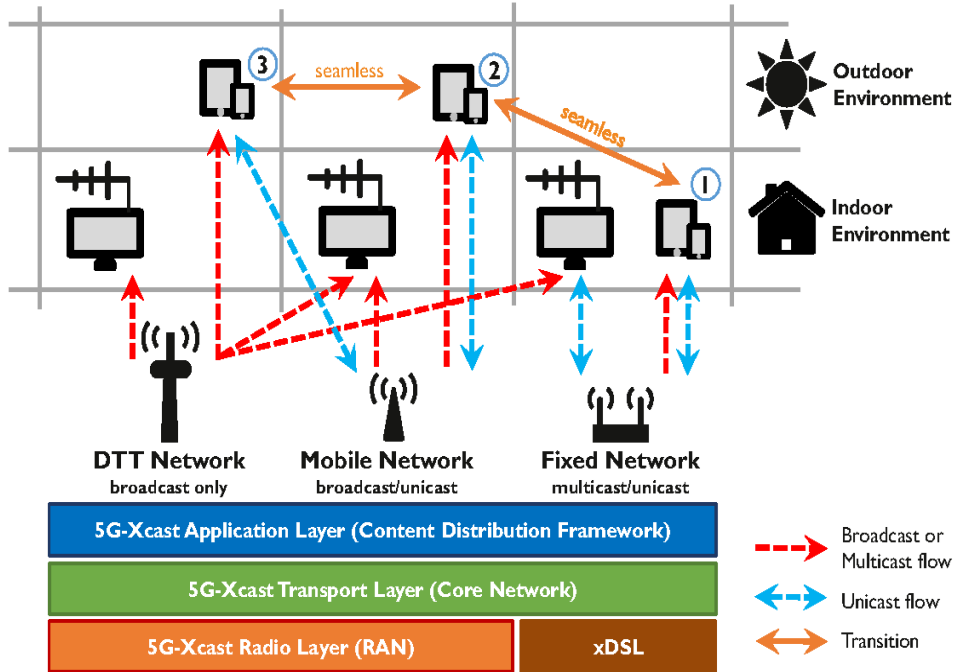
AUTOMOTIVE

- 1 Automated driving
- 2 Share My View

- 3 Bird's Eye View
- 4 Digitalization of Transport and Logistics
- 5 Information Society on the road

Source: 5GPPP, "5G Empowering vertical industries"

Media and Entertainment in 5G Vision



- Seamless services
- Customer-Driven approach

Enhancing **data-driven** revenue models

Efficient
Better experience

Enhancing what we have

Ultra-High-Definition Media



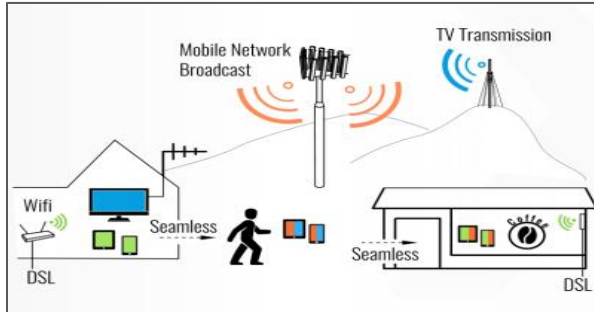
Extremely large-scale online gaming



Delivering larger volume content with lower latency

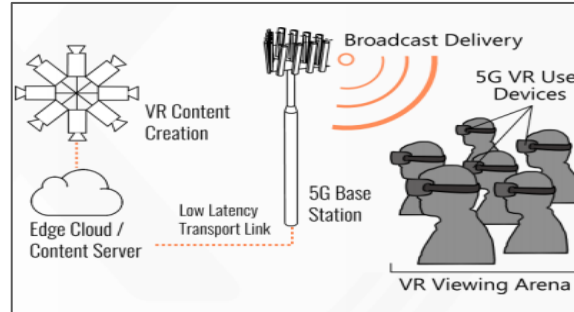
Discover new use cases

Hybrid and seamless broadcasting



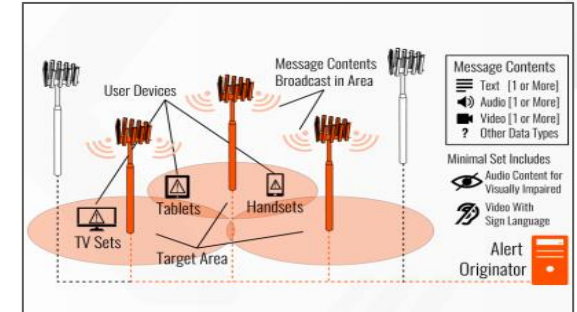
Any Device, Anywhere

VR/AR media



Smart tourism in UK
VR/AR Broadcasting
Online VR/AR Gaming

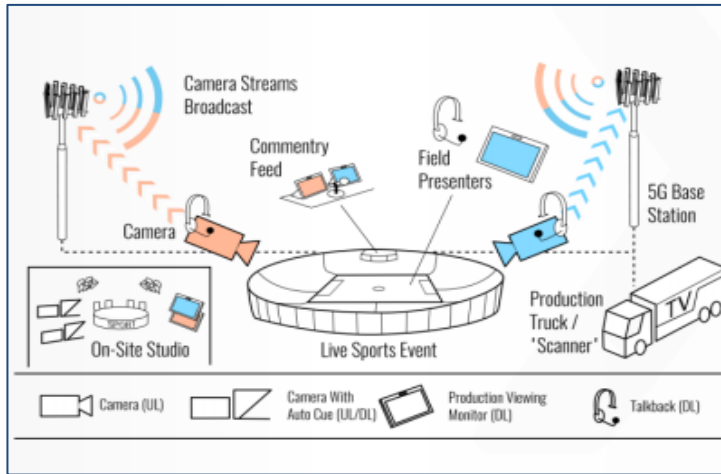
Public Warning Service



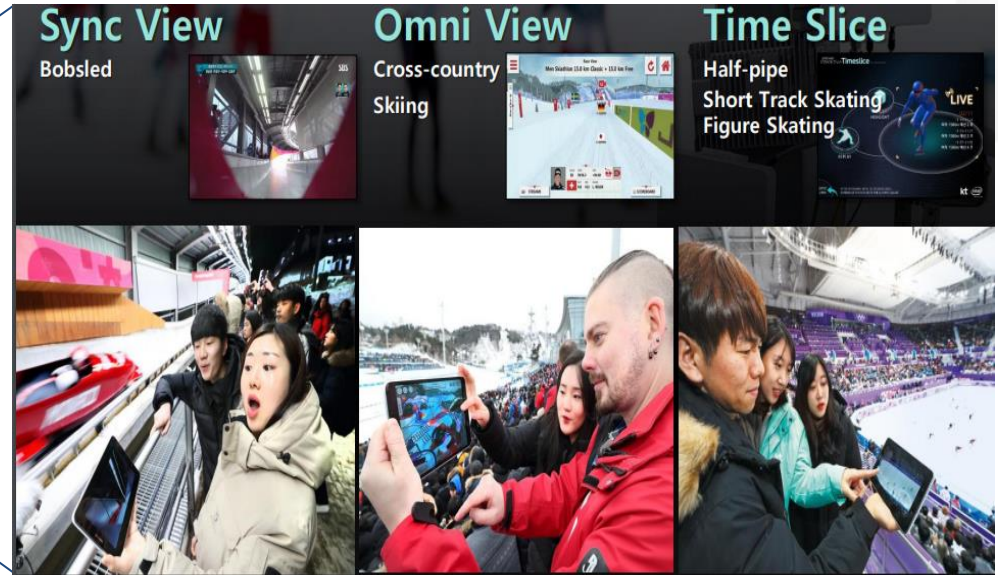
Efficient and thoroughly service

Discover new use cases

Remote Production



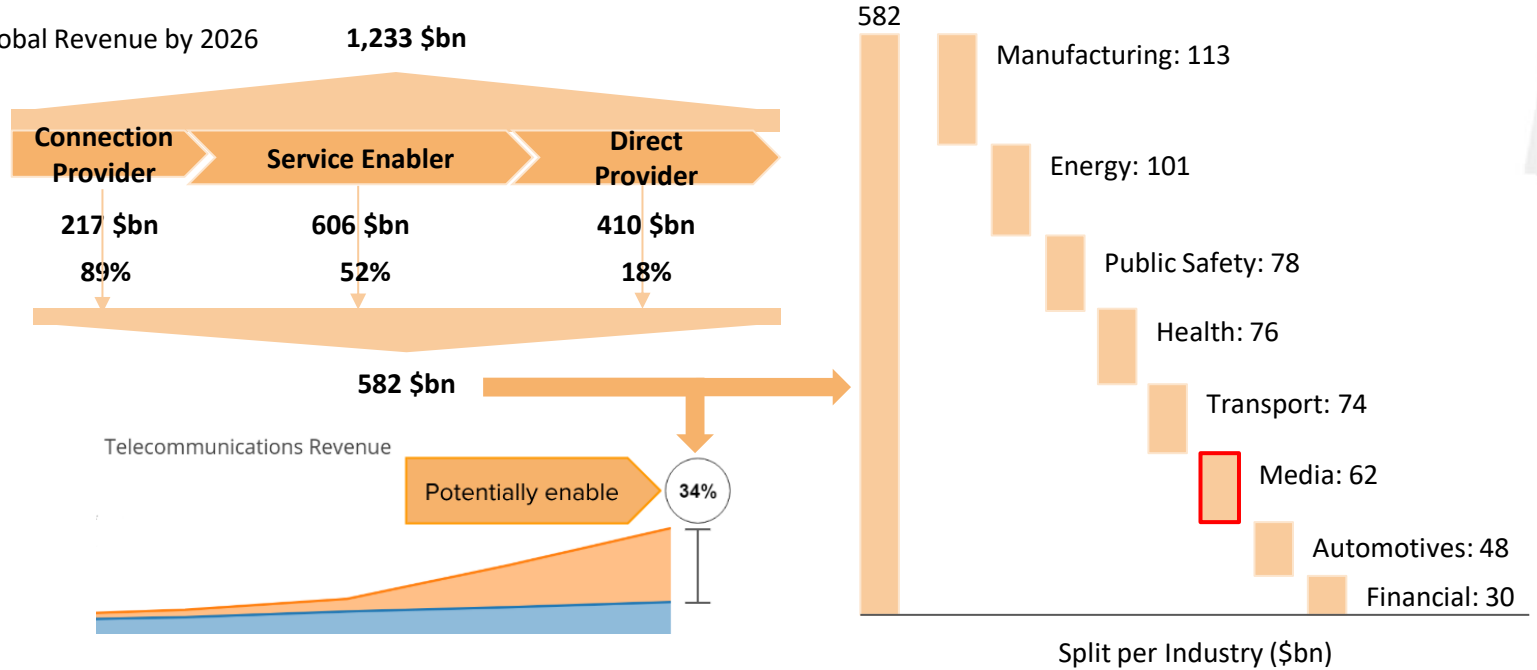
Decentralized approach in content production



IoT takes part in remote live content production
Winter Olympics 2018, South Korea

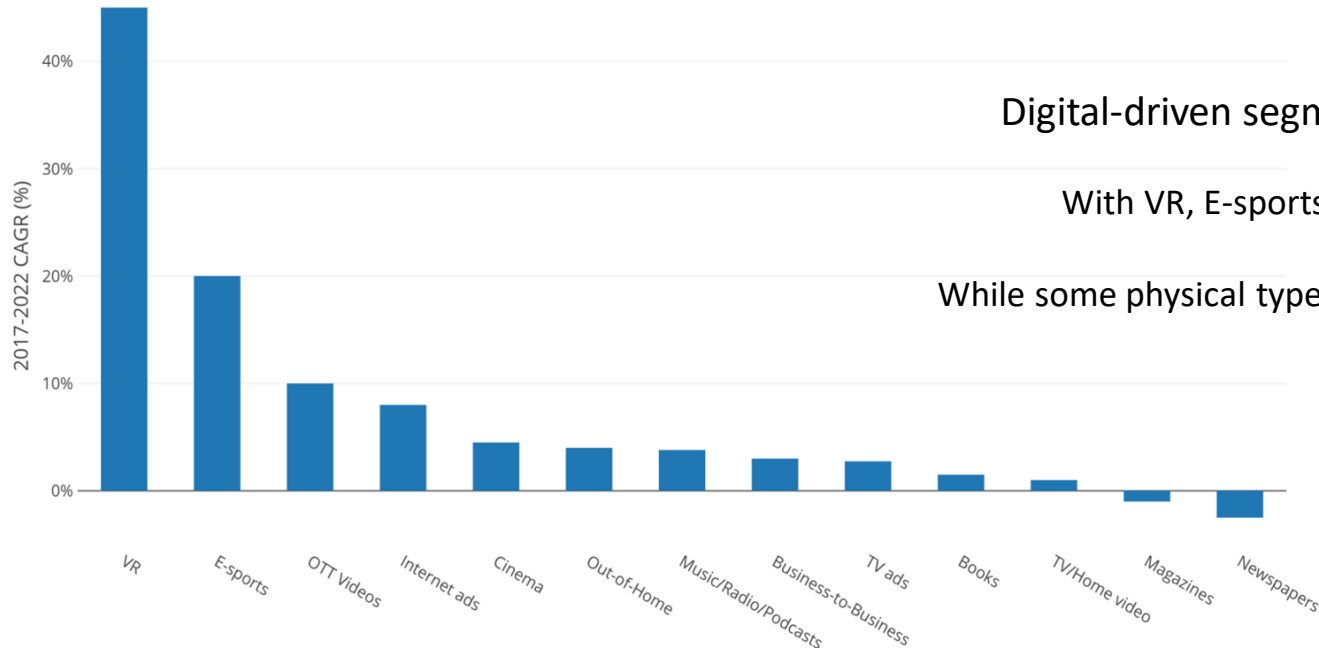
Media and Entertainment share will be taken

5G Contributed Global Revenue by 2026



Promising alternatives for media and entertainment

Segment Compound Annual Growth (CAGR) for next 5 years



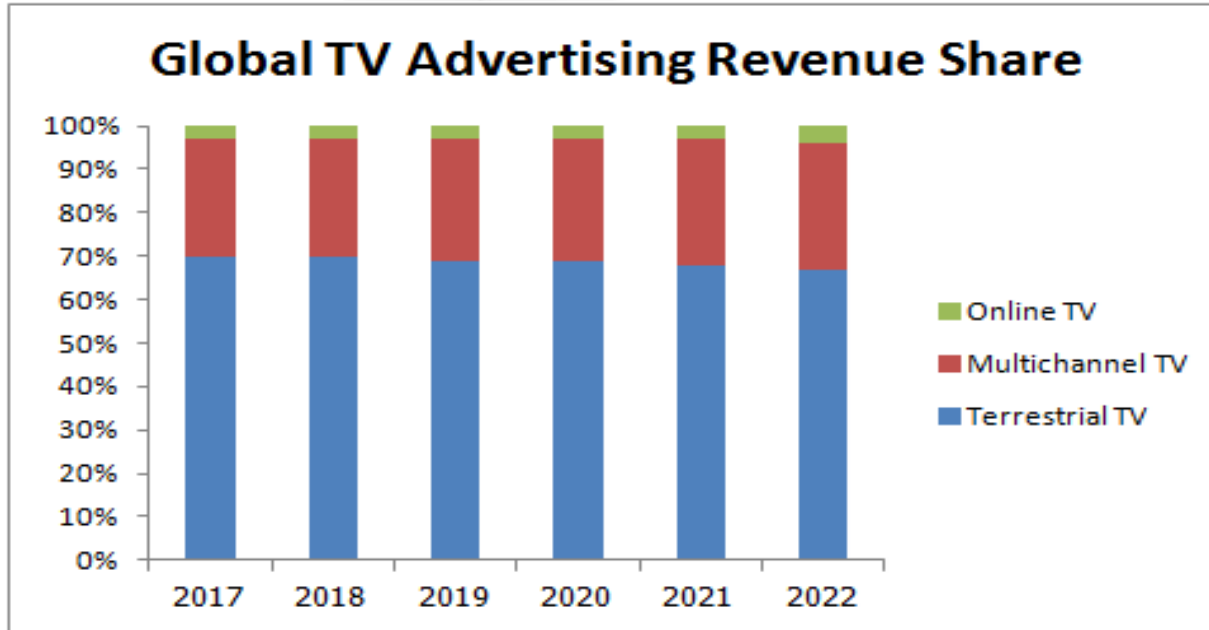
Digital-driven segments have the fastest growth

With VR, E-sports and OTT videos taking the lead

While some physical types show a sign of growing too old

Key Takeaway

- Revenue sources revolve around user experience
- Quality of Service (QoS) and Quality of Experience (QoE) are top priorities in immersive media and catching up with consumer demand
- Exploit the evolving technology to build an effective business intelligence for new efficient, low-cost and time saving solutions



Nearly 70% of the advertising share are still on the traditional TV



ԴԱՌՆ.

DISRUPTIVE TALK 2018



**RONNAPONG
KAMNUANTHIP**
BEC WORLD



**SUVIT
ARAYAVILAIPONG**
AIS



**PALLAPA
MANOCH**
LINE



**TRILUJ
NAVAMARAT**
MAAT



RONNAPONG KAMNUANTHIP

CHIEF COMMERCIAL OFFICER
BEC WORLD PUBLIC COMPANY LIMITED



BEC WORLD

Being a leader in our service industry persistently and also reach all viewers, having a good and stable relationship.

We also intend to efficiently use our existing resources and create work satisfaction for all customers. In addition, we put all our effort to provide the best services to our business partners and provide good benefits for all stakeholders.



THAILAND'S

Top Corporate Brand Value 2018

Category: Media

BEC World PCL is recognized as the corporate with the highest brand value in Media industry (Channel 3 Thailand) along with 14 leading brands in Thailand by The Stock Exchange of Thailand (SET) and Chulalongkorn University.



BEC WORLD

THAILAND'S TOP CORPORATE BRAND VALUE 2018



“ผมขอใ้พวกเรายังคงมุ่งมั่นที่จะทำสิ่งดี ๆ
ให้กับช่อง 3 และแฟน ๆ ของเราต่อไปครับ”

ขอบคุณครับ

BUSINESS PROFILE

BEC WORLD

To be a market leader and the best provider in TV production and presentation of the highest quality news, **varieties**, game shows, TV Series and entertainment program.

TV BUSINESS

RADIO BROADCASTING

NEW MEDIA

PRODUCTION OF VARIETY SHOWS, CONTENT AND PROMOTIONAL CAMPAIGN ACTIVITIES

ENTERTAINMENT & DOCUMENTARY PROGRAM SOURCING, PRODUCTION & DISTRIBUTION

BEC's
Brands



Nature of
Business

BEC owns Analogue Terrestrial Television, Digital Terrestrial Television, and Subscribed Television Broadcasting. Our attention is not only on viewers nationwide, we also have already broadcasted our television programs to Japan and the United States.

BEC and its subsidiary companies cooperate radio station FM 105.5MHz and FM 95.5MHz, including sale of radio airtime and program development.

BECi, a subsidiary company operates digital business; mobile applications, websites, and social media.

Over 600 members across the nation, we always provide resourceful and up-to-date news / information to our audience.

For international market, we provide our expertise in conducting concert, musical play, sport activities management, and event ticket selling. In addition, our own music production is also expanding that many songs become the 1st of music top charts in Thailand.

KEY STRENGTHS

1 48 YEARS OF EXPERIENCES IN ENTERTAINMENT,
PRODUCTION, AND BROADCASTING

2 More than consolidated of 80 million followers on Instagram!
OVER 200 QUALITY+ CELEBRITIES



3 1,000+ OF DRAMA
CONTENTS IN HAND



4 **STRONG**
BROADCASTING
INFRASTRUCTURE
WITH
1 ANALOG TV
3 DIGITAL TV
2 RADIOS
2 OTT PLATFORMS





“Content is where I
expect much of the
real money will be
made on the Internet”

-Bill Gates, 1996

“Content is King” Essay



บุพเพสันนิวาส

LOVE DESTINY

บทประพันธ์ : รอมแพง บทโทรทัศน์ : ศัลยา

A woman with long dark hair, wearing a pink patterned Thai blouse and a dark patterned sarong with a gold belt, sits on a bed. She is smiling and has her hands clasped. The room is ornate with a canopy bed, gold-colored metalwork, and pink flower garlands. A lantern and flowers are on a table to the left.

RECORD-HIGH TV RATINGS

18.6

Total Thailand

23.9

Bangkok

Source: AC Nielsen



TOP TV
VIEWERSHIP (mm)
IN DIGITAL TV ERA

12.2

Total Thailand

2.2

Bangkok

Source: AC Nielsen

EXPLOSIVE ON-LINE
VIEWS

1.2 BILLION

Across all Official Platforms



Mello



หน้าแรก



Mello Originals



ซีรีส์ไทย



ซีรีส์ นานาชาติ



วาไรตี้



คลิปเด็ด



ทีวี



ยอดวิวกว่า
200,000,000
VIEWS

1 ล้าน ดาวน์โหลด
ในสามเดือนแรก
ที่เปิดตัว

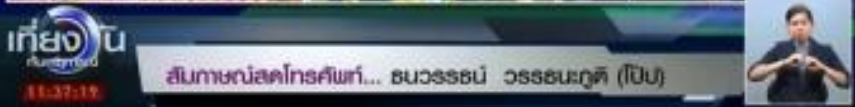
ติด TREND
TWITTER
ทุก EPISODE



GET YOUR FEELING
DOWNLOAD NOW

A man and a woman are standing on a wide, empty city street. The man is wearing a green patterned Thai shirt (jama) and a gold belt. The woman is wearing a yellow and gold patterned Thai dress (sabai) over a purple skirt. They are both looking towards the camera. The street is lined with trees and buildings in the background.

รถปิกนุกบ?





**พีทเนื้อมะตูมชิงนำ
พบ 'บิกคิว'
กรีกสนั่นทำเนียบ
นพการีเซนต์ทองประกาย
ทยอยปฏิบัติภารกิจให้รัฐบาล
ยิงนัดเกรงที่อยากเลือกสิ่งอื่น**

ทำเนียบอดีต "สันติสุขนคร" ไป-
รณรงค์ ควบ "นพการีเซนต์ทองประกาย"
วามิ นพการีเซนต์ทองประกาย ผู้ให้
สันติสุข "นพการี" และ "นพการี" ★ 10/10/10



เดลินิวส์
ฉบับที่ 10,101 วันที่ 1 ตุลาคม 2554
www.dailynews.co.th 1001 10 101



ดม ชิด ลี



No.1 Worldwide Trending Top Social Media Buzz in Thailand

< Worldwide trends ⚙️

- 1 **#บุฟเฟสันนิวาส**
588K Tweets
@belldelagua, @real_pla and 1 more are Tweeting about this
- 2 **#NationalCerealDay**
9,792 Tweets
- 3 **#EyesOnYugyeom**
42.7K Tweets
- 4 **#VcAtraiAquilaQueFala**
9,194 Tweets
- 5 **#WednesdayWisdom**
47.4K Tweets

เป็นทียิยมใน ไทย

- 1 **#บุฟเฟสันนิวาส**
2.08M ทวิต
🇹🇭 @mthai, @daradaily และอีก 1 คนกำลังทวิตเกี่ยวกับสิ่งนี้
- 2 **#IWD2018 ♀**
194K ทวิต
🇹🇭 @Reuters, @BBCWorld และอีก 2 คนกำลังทวิตเกี่ยวกับสิ่งนี้
- 3 **#วันสตรีสากล ♀**
5,845 ทวิต
🇹🇭 @kafaak, @kapookdotcom และอีก 2 คนกำลังทวิตเกี่ยวกับสิ่งนี้
- 4 **#กาหลมหรทึก**
6,903 ทวิต
🇹🇭 @hamzterzkub และ @daradaily กำลังทวิตเกี่ยวกับสิ่งนี้
- 5 **#มายาเร็นรัก**
19.3K ทวิต

Current Audiences: **They Watch and Chat**

Almost half of audiences watch TV and chat, while the rest usually chat while watching TV



This is how they talk while watching



TOP ENGAGEMENT

*ไม่รวมช่องทาง youtube



1



185,299 likes | 191 comments
| 185,490 engagement count



2



119,802 likes | 167 comments
| 119,969 engagement count



3



23,014 likes | 69,682 retweet
| 92,696 engagement count



4



9,062 likes | 78,802 retweet |
87,864 engagement count



5



68,247 likes | 1,541 comments
| 15,674 shares | 85,462
engagement count



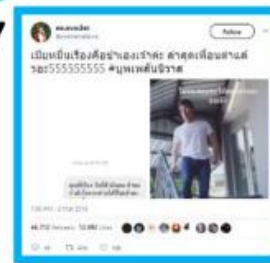
6



9,983 likes | 71,166 retweet |
81,149 engagement count



7



12,001 likes | 66,388 retweet
| 78,389 engagement count



8



59,980 likes | 2,106 comments | 4,021
shares | 66,107 engagement count



9



63,850 retweet | 63,850
engagement count



10



9,394 likes | 53,997 retweet |
63,391 engagement count

SOV by Channel



69% 238,268 msg.



23% 78,345 msg.



4% 14,505 msg.



3% 10,893 msg.



1% 1,977 msg.



0.1% 582 msg.



39,563,820 Engage Count

344,570 Mentions/Messages

说起泰剧，不少中国观众脑海里想起以下形容：颜值高、表演浮夸、人设脸谱化严重……正在泰国热播的《天生一对》(下简)也许会让人有些改观。

带动当地旅游热 全民模仿表情包 泰剧《天生一对》突然火了

本报驻泰国特约记者 鹿梦琪 杨鑫 报道

《天生一对》是根据小说改编的穿越类电视剧，讲述一个现代考古历史学心地善良的鲜女遭遇车祸，灵魂穿越到一个父母双亡居住在未婚夫家的古代小姐身上。小姐生性顽劣被未婚夫一家厌恶，而穿越后的鲜女凭借自己的善良和才华成功逆袭，最终俘获男主角的心。百看不厌的穿越梗加上笑料不断的喜剧元素，虽然不新颖却很好观众胃口，而高度还原的历史设定和精良的制作更是成功带起“历史热”。该剧自2月21日在泰国电视三台开播以来，开播首周收视率突破11，最新更新的第八集收视率破18，这样的成绩近年来十分罕见。

在泰国，已经很久没有一部电视剧像《天生一对》这样引发全民追剧热潮。《环球时报》特约记者在泰国曼谷发现，该剧中的古代用语开始成为民众日常交流流行语，不少泰国民众因为这部剧爱上穿古装。死忠甚至去拍摄店做偶像的阿奴发。

女主角在剧中
的招牌恶毒脸(右图)
被剧迷争相模仿，
甚至被做成表
情包在泰国年轻
人之间流行起来。



该剧还引发民众对阿瑜陀耶王
朝历史和各种历史人物的
兴趣，同时还带动旧都
遗址大城市的旅游产
业。

泰剧的刻板印象

该剧能在泰国本土市场引发现象级热潮，某种程度上归因于近年来穿越题材的作品甚少出现在当地大众视线中。不过从另一角度来看，《天生一对》也是泰国走在革新道路上的一个爆发：少有涉及的时代背景，代入感很强的穿越模式、匠心独运的剧本内容和精心设计过的服装布景。无不展示近近年来泰剧从粗糙到精致，从陈旧到创新、从封闭到融合进步。

2013年—2015年，风靡泰国的青春剧《荷尔蒙》直面青少年群体的种种问题，在人物性格塑造上摆脱过去泰剧中黑白分明的二元模式，丰满的

人物设定和交叉复杂的故事情节使它成为泰国青春剧中最具神作的作品。2016年—2017年，制造出无数年度流行语的喜剧《娘炮腔的日记》则把目光聚焦于LGBT群体。尽管泰国开放的文化氛围使得“娘炮”早已成为泰国词语之一，但该剧极为精致的史料设置和对群体的真实还原让它脱颖而出。而2016年吸引讨论热潮的悬疑剧《我恨你，我爱你》则显示出泰国影视工作者在叙事手法上的革命性探索。这部泰剧以同一个故事的不同角色叙述而展开，颠覆传统的叙事方式。

在中国仍是小众

从2000年左右泰国开始的国外输出文化产品开始，泰国在中国市场的传播可以分为两个阶段：第一阶段是2000年—2009年中国各地电视台引进剧的大热；第二阶段是进入全民互联网时代后泰国粉丝的遍地开花。《天生一对》除了被翻成中文，也有韩文、英文、越南文、英文等各种字幕，走红于多国网络。整体来看，虽然泰剧在中国的影响力逐渐在扩大，但泰剧爱好者团体尚属规模较小的兴趣群体。《天生一对》能否成为2018年开年泰剧中的一匹黑马在中国市场带出一片天？还有待时间来证明。▲

低幼动画片瞄准中国家长

本报特约记者 韩秋





PNN Anniversary
with Bella Ranee Campen
Phnom Penh, Cambodia



T-SHIRT 399 BAHT



SCARF 599 BAHT



“BUPPESANNIVAS” MERCHANDISE



SHOPPING BAG 399 BAHT



MIRROR 150 BAHT



ACRYLIC STANDY 599 BAHT



RULER/ BOOKMARK 90 BAHT



MAGNET 60 BAHT



KEYCHAIN 100 BAHT



PILLOW 399 BAHT



SMARTPHONE STANDY 250 BAHT

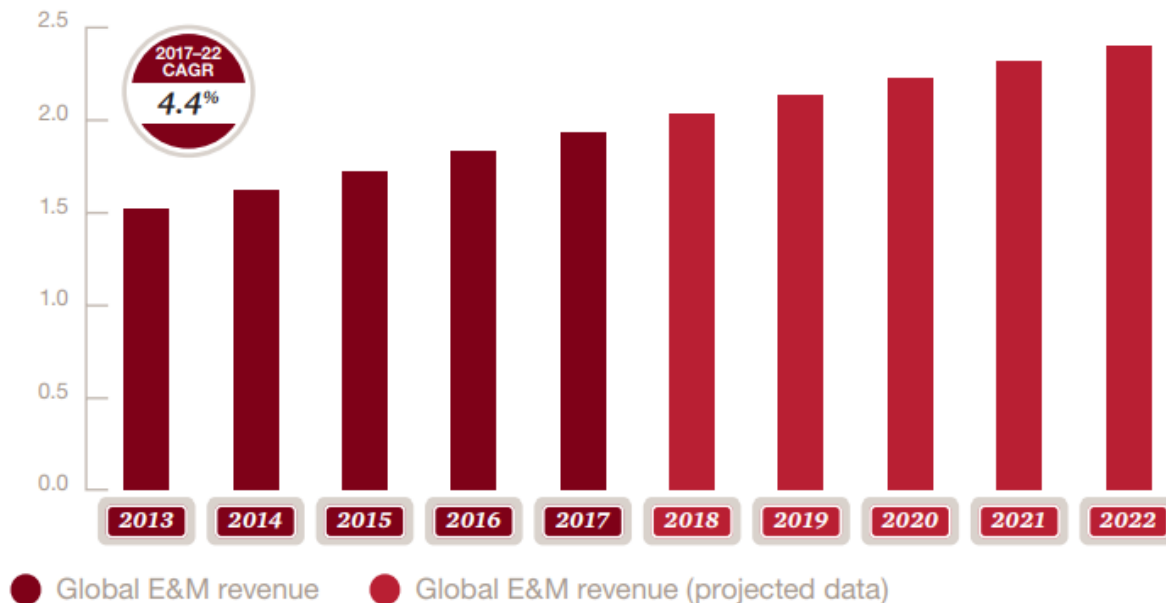


DVD BOXSET 1,299 BAHT



Exhibit 1: Global E&M revenue (US\$ tn)

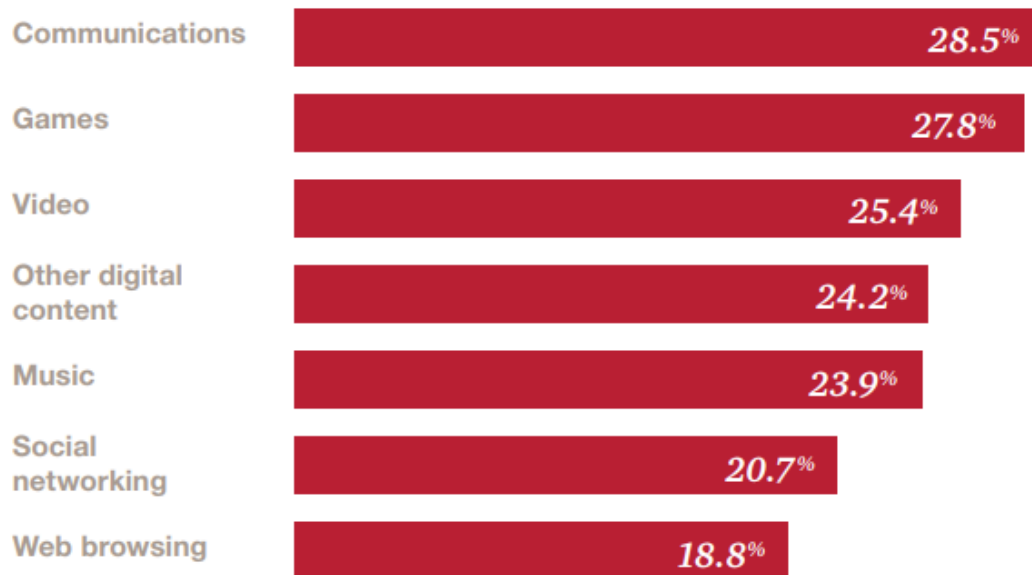
Growth rates remain steady even as the industry is being transformed.



Source: PwC Global Entertainment & Media Outlook 2018–2022, www.pwc.com/outlook

Exhibit 13: Data consumption CAGR by content type, 2017–22

Consumers are expected to spend more time engaging in E&M sectors.



Source: PwC Global Entertainment & Media Outlook 2018–2022, www.pwc.com/outlook

Key Words

- Contents
- Hits
- Audience Centric





**SUVIT
ARAYAVILAIPONG**

HEAD OF CONSUMER PRODUCT
MANGEMENT

ADVANCED INFO SERVICES
PUBLIC COMPANY LIMITED

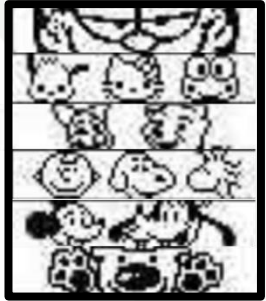
DIGITAL

CONTENT SERVICE PROVIDER

DIGITAL

Content Service

Evolution



AIS MY LOGO



AIS MY RINGTONE



SMS CONTENT
SERVICE



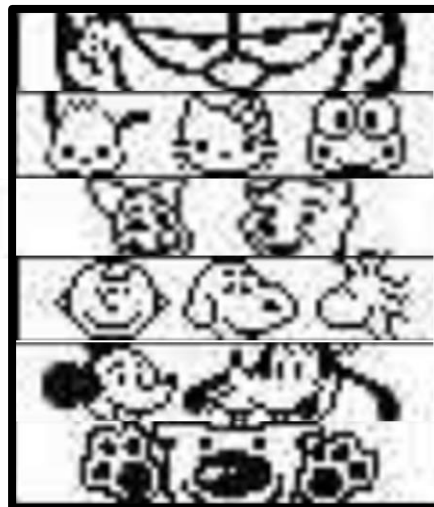
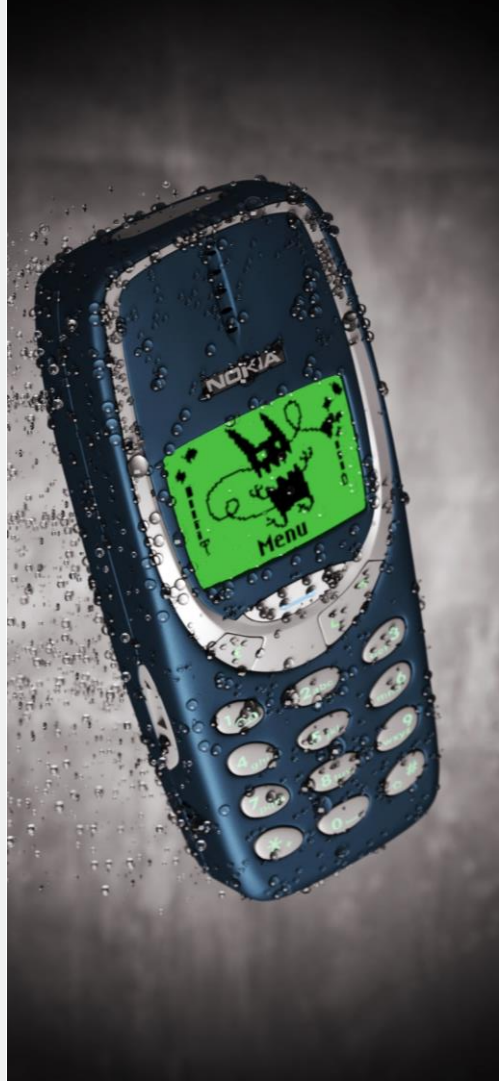
AIS MOBILE GAME



AIS KARAOKE
SERVICE



AIS TV AND
VIDEO SERVICE



AIS MY
LOGO **mobileLIFE** 

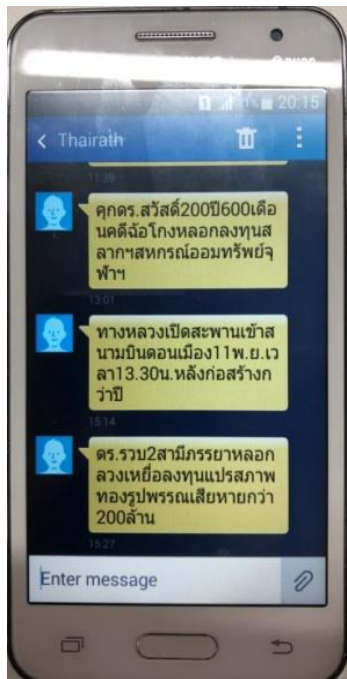


AIS MY
RINGTONE

mobileLIFE 

: <https://www.ryt9.com/s/prg/267277>

SMS Content Services



NEWS



HOROSCOPE



HOT SCORE REPORT

Calling Melody



callingmelody.net

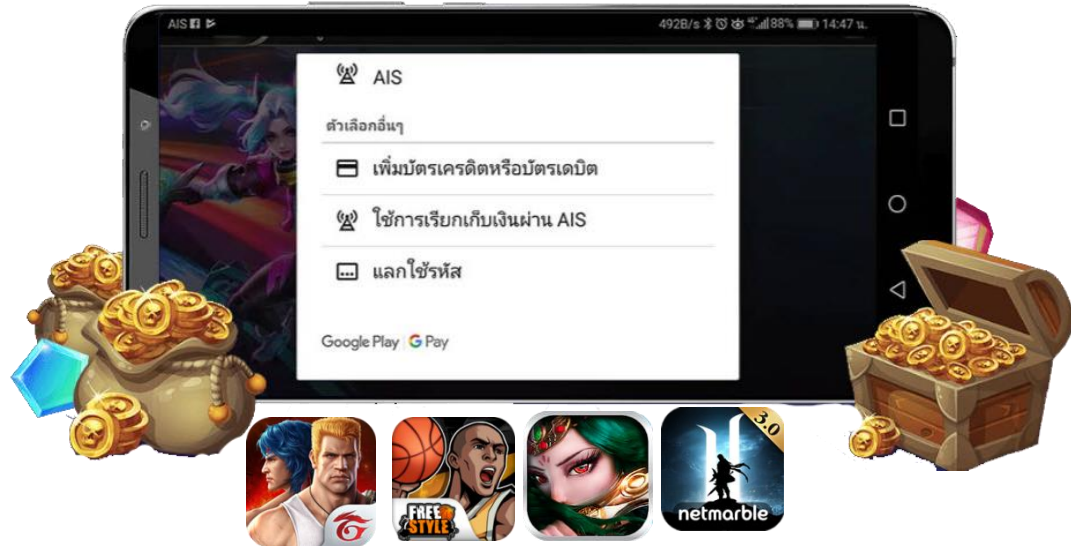
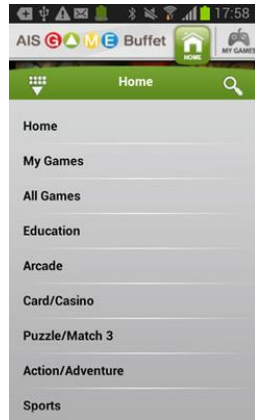
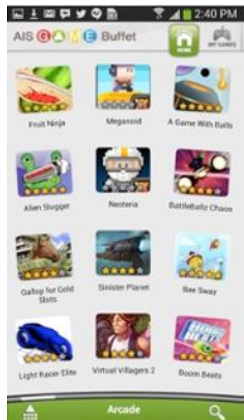


The icon for the AIS Calling Melody App is a rounded square with a green background. It features a stylized graphic of a musical staff with five vertical bars of different colors (red, orange, yellow, green, blue) and two large, colorful musical notes (red and orange) positioned below the staff. The AIS logo, consisting of a green swoosh and the letters 'AIS', is located at the bottom of the icon.



ผ่าน  **Calling Melody App**

AIS Mobile Game



AIS Karaoke Service

เล่นสนุก
KARAOKE



AIS Karaoke

AIS TV and Video Service

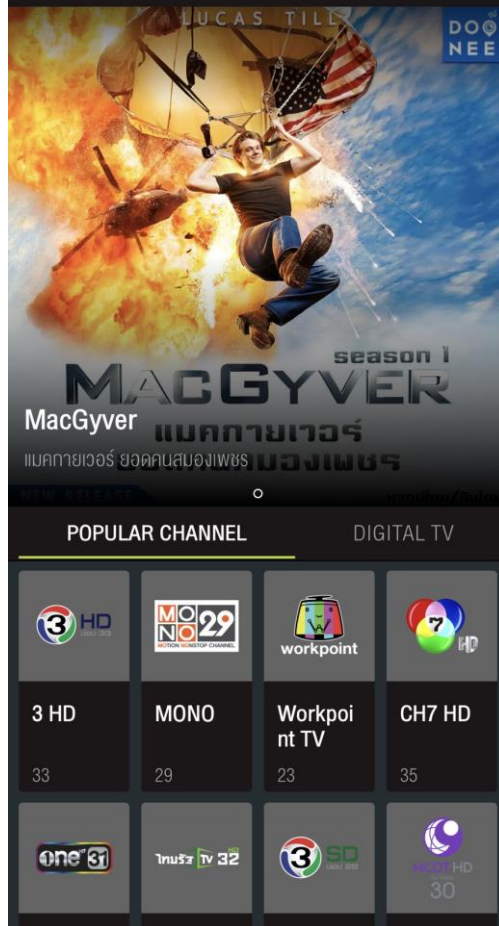
AIS PLAY

ความบันเทิงแบบ เอ็กซ์คลูซีฟ

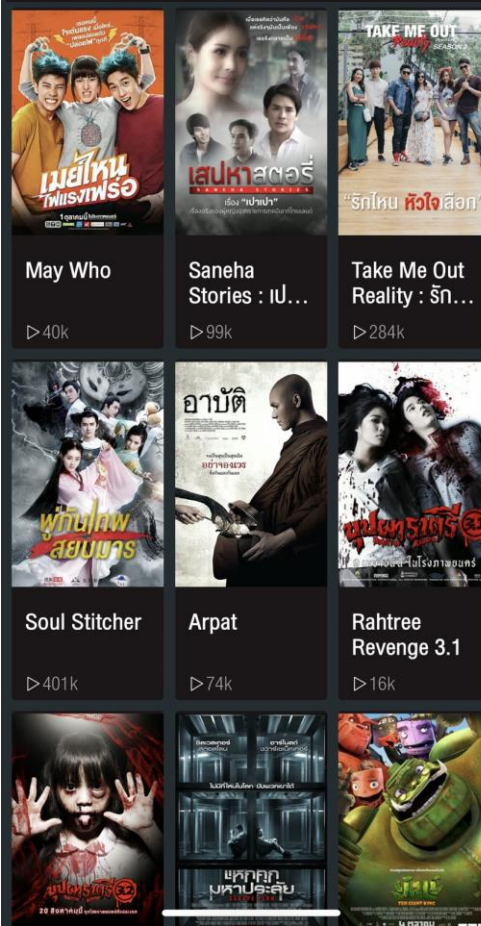




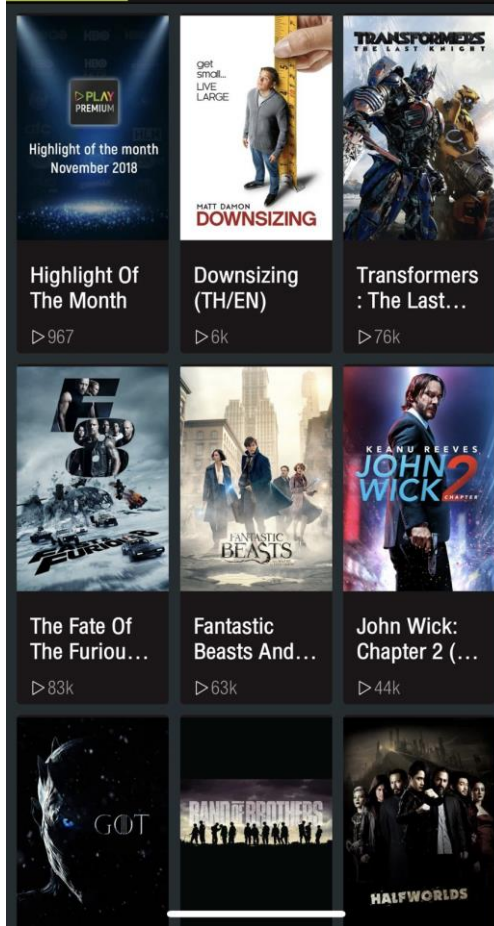
Digital TV



Freemium TV and VoD



Premium TV and VoD





2018 Live Event : Most Viewed

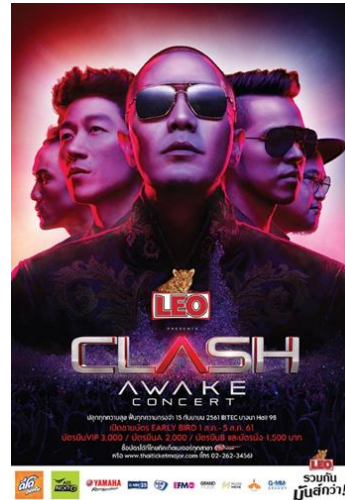
on AIS PLAY & AIS PLAYBOX



KCON 2018 Thailand
114,539 Unique Users
 * AIS PLAY only



GOT 7 Live Concert
50,391 Unique Users
 * AIS PLAY only



CLASH AWAKE
32,881 Unique Users

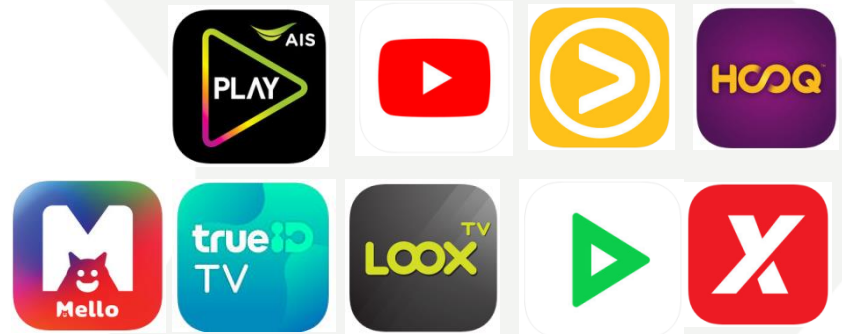


Dance Fever
32,052 Unique Users



I AM MAI
31,647 Unique Users

Traditional TV will be moving towards to



From Fixed (at Home) towards Mobile (Anywhere)

HOME



ANYWHERE



From Fixed time (Linear) towards Hybrid of Fixed time (Linear) and Anytime (VoD)

Linear

VoD



More short form TV Contents to serve mobile (anywhere and anytime) consumption lifestyle



ครูเพ็ญศรี | ยืมมือครูล้อล้อข้อพ่อข้อแม่
Full HD

WorkpointOfficial
การดู 3.7M ครั้ง



รวมมุก ตลก 6 จาก 2018

WorkpointOfficial
อัปเดตแล้วเมื่อ 2 วันที่ผ่านมา



ชัดใจ - COLORPITCH [Unofficial
MV]

theplatformfilmmake production
การดู 135M ครั้ง



จดหมาย - The Toys | Cover By
Punch Ft. Fern

Saruda Kul
การดู 283K ครั้ง

Family View

(Big Screen at Home)

Smart TV

Play box



Persona View

- Personal Smart Phones/Tablets/Laptop on the move
- Cast to Big screen at condo/home



Thank you



LINE



**PALLAPA
MANOCH**

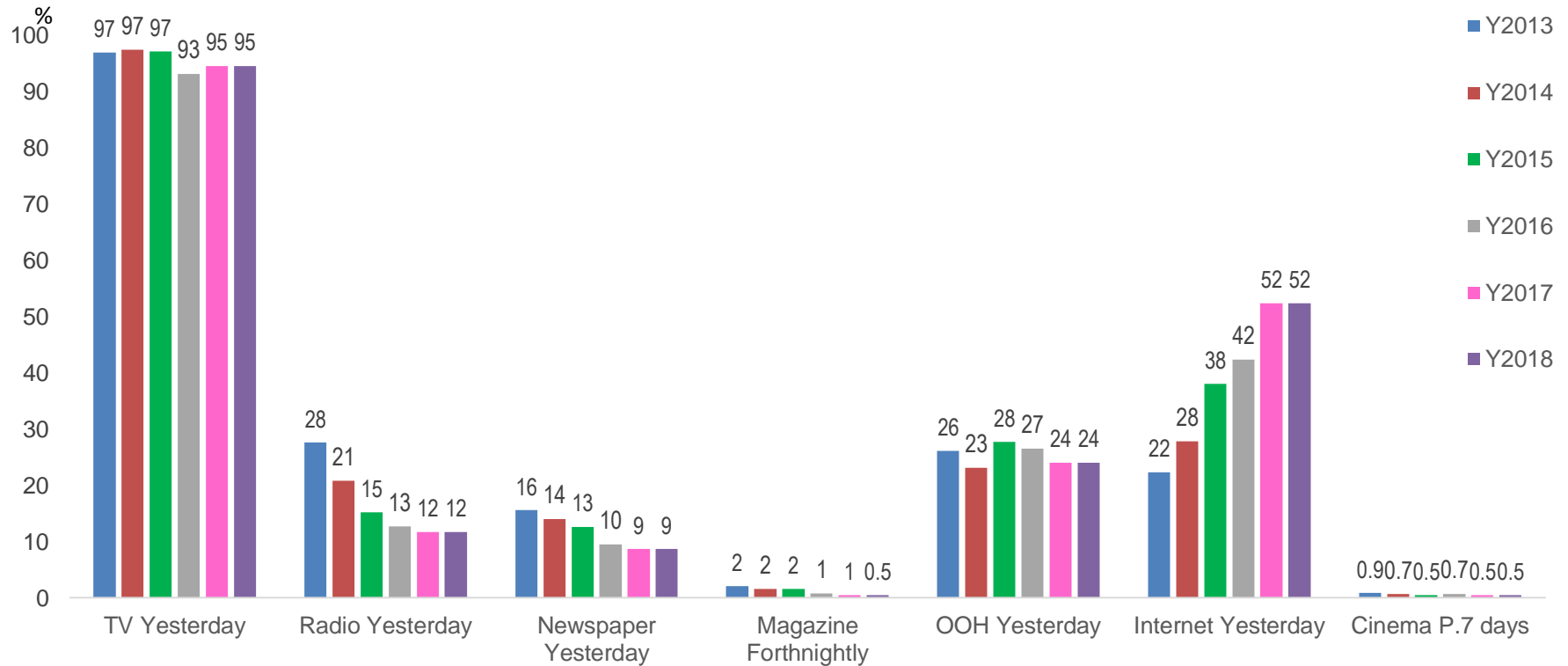
HEAD OF LINE TV
LINE COMPANY (THAILAND) LIMITED



TRILUJ NAVAMARAT

PRESIDENT OF MEDIA AGENCY
ASSOCIATION OF THAILAND (MAAT)

MEDIA PENETRATION



Base : MF 12+ ANW

Remark: Digital TV start from April 2014

Source: ACNielsen-Thailand CMV

ADEX 2016, declined 11% vs 2015

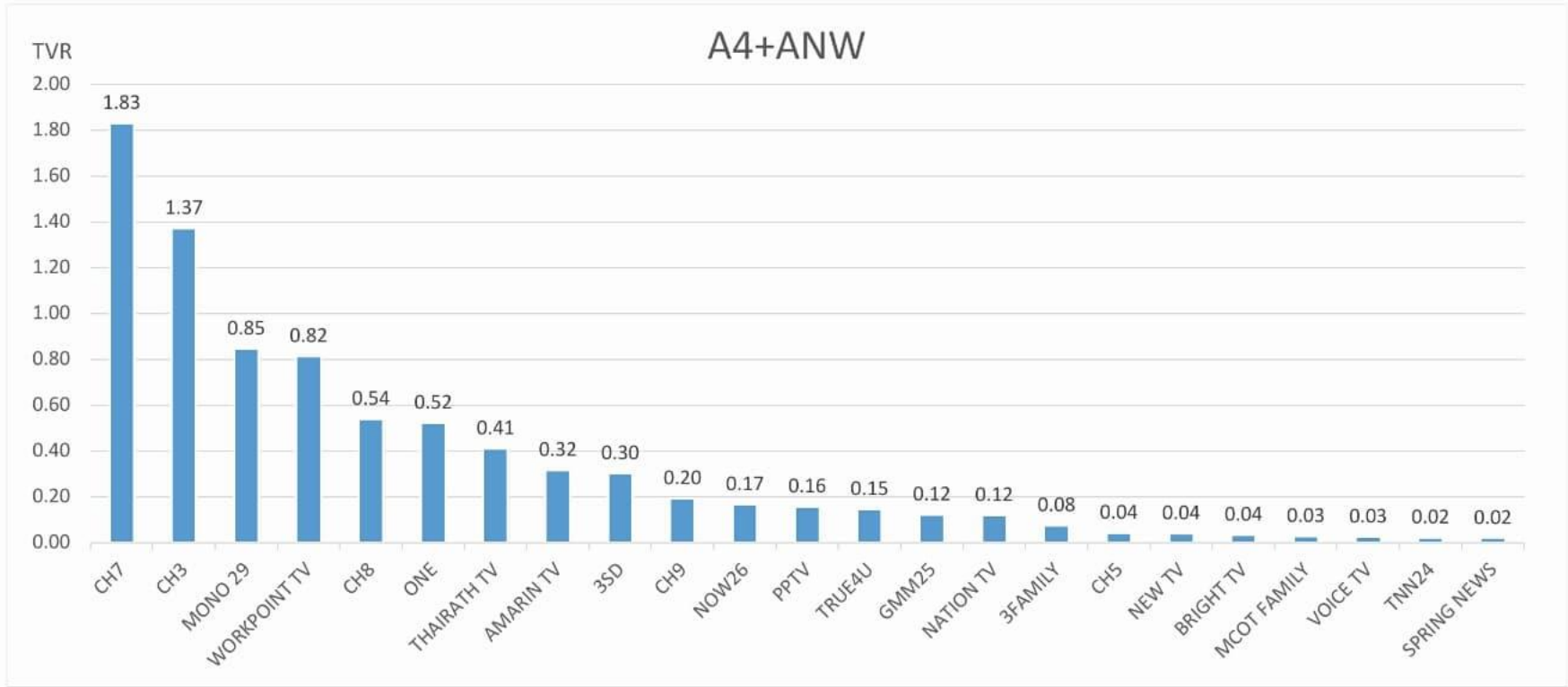
	2015		2016		15 vs 16
	Bt m.	%	Bt m.	%	% Change
TV	57,412	42	47,121	39	-18%
Digital TV	20,931	15	20,393	17	-3%
Cab/Sat	6,055	4	3,465	3	-43%
Total TV	84,398	62	70,979	58	-16%
Radio	6,417	5	5,983	5	-7%
Newspapers	17,489	13	14,059	12	-20%
Magazines	4,505	3	3,207	3	-29%
Cinema	5,134	4	5,445	4	6%
Outdoor	4,265	3	5,665	5	33%
Transit	4,478	3	5,311	4	19%
In-Store	2,000	1	2,000	2	0%
Internet	8,084	6	9,150	8	13%
Total	136,770		121,799		-11%

2019 Advertising Expenditure Forecast

	2017		% change	2018		% change	2019		% change
	Bt. M.	%		Bt. M.	%		Bt. M.	%	
Digital TV	62,781	56%	-7%	66,000	57%	5%	69,200	57%	5%
Cable & sat.	2,692	2%	-22%	2,400	2%	-11%	1,800	1%	-25%
Total TV	65,473	59%	-8%	68,400	59%	4%	71,000	59%	4%
Radio	4,468	4%	-25%	4,600	4%	3%	4,600	4%	0%
Newspapers	7,704	7%	-45%	6,100	5%	-21%	4,575	4%	-25%
Magazines	1,980	2%	-38%	1,300	1%	-34%	845	1%	-35%
Cinema	6,815	6%	25%	7,100	6%	4%	7,100	6%	0%
Outdoor	6,391	6%	13%	6,800	6%	6%	7,150	6%	5%
Transit	5,878	5%	10%	5,900	5%	0%	6,200	5%	5%
In-Store	946	1%	35%	1,100	1%	16%	1,100	1%	0%
Internet	12,402	11%	24%	14,973	13%	21%	18,716	15%	25%
Total	112,057	101%	-7%	116,273	100%	4%	121,286	100%	4%

SOURCE: Nielsen Media Research excluding classified ad, Cd/DVD, music.. Digital : '18 from DAAT , '19 forecast by MAAT

TOP TV CHANNEL (ALL DAY)



Period: January – October 2018
Source: ACNielsen-Arianna

DISRUPTIVE TALK 2018



**RONNAPONG
KAMNUANTHIP**
BEC WORLD



**SUVIT
ARAYAVILAIPONG**
AIS



**PALLAPA
MANOCH**
LINE



**TRILUJ
NAVAMARAT**
MAAT