

Media in Thailand: The future of mobile, addressability, programmatic and more

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[Research](#)

Source: Research on WARC, January 2018

Downloaded from WARC

This article outlines the key media trends set to shape Thailand's marketing landscape through to 2020, including mobile, programmatic, AI, big data, and addressability.

- Rapid local adoption of 3G and 4G mobile packages in rural areas and a multitude of new mobile ad-tech companies will continue to re-define e-commerce routes to market.
- Addressability – driven by the twin forces of data and technology – is transforming the media and marketing business adding new layers of complexity, and opportunity.
- Thais are very visual communicators, with a much higher propensity than in other markets to communicate only through photos, video, emoji and stamps rather than text.
- Social media platforms and chat apps form the backbone of Thailand mass media reach, combined with addressable media elements which are lacking with linear television.
- By 2020 in Thailand all channels will be 'programmatic', including traditional channels such as TV, radio and outdoor.

Thailand 2020: Principles for Marketing Success

This article is part of a series of articles on marketing success in Thailand. [Read more](#).

"The ripe apple falls, it doesn't know what else to do." Marty Rubin

Thailand and its media scene is going through the same revolutions we are seeing everywhere: technological, regulatory and economic.

The complexity of modern marketing as Thailand transforms from an analogue era of comparative restricted expression to the one we are currently seeing evolving has been rapid and will only get faster. As with many parts of the world these forces contribute to a new market reality and sense of living in a retail and cityscape similar to those foretold in 2002 film noir, *Minority Report*.

The modernisations in local media and marketing that are observable from the years 2013-2017 eclipse those in

the 12 years preceding. As an active observer of the local media ecosystem it would seem we can expect technological, regulatory and economic development in the next short years running up to 2020 will bring about five years of change!

Increasingly more successful advertisers in Thailand are working harder to mitigate the fatigue people now feel when they see hackneyed brand mascots embedded in 'shouty' one-way communications. Meeting the expectations of the new and growing creative class is mission critical and as such we are seeing the value of open-source creativity.

We increasingly see progressive agency teams working closely with their clients to set up more agile creative and production labs where communications are inspired by insights obtained from social analytic software and populated by copy-writers.

One case of a run-away phenomenon masterfully re-directed to harness the power of influence is that of TV Show 'The Mask Singer' and the unpredictable impact that it had upon gynecology wards around the country. The Mask Pap Smear Initiative was inspired by the popular 'The Mask Singer' program, where contestants hid their identities using all manner of masks, including Thai fruits.



Source: WorkPoint Entertainment, 2017

Although patients still had to provide IDs in order to get the free pap smear test, the mere fact that they could hide their faces from the doctors and nurses during the procedure, apparently made it much less awkward for them, fed the Thai sense of fun and created a format that was easily shared and promoted individual creativity. All the seeming secrets of media success today: give people a chance to go on LINE or Facebook and share a funny picture.



Source: Photo courtesy of Phaythai Hospital, 2017. Photos of the masked Thai women waiting to get their pap smear test at a hospital.

What will the mobile wand bring next? Thailand does not mean Bangkok

The applied consumer interactivity that mobility offers has enabled more personal interactions between brands and people in recent years especially among those living outside of Thailand's main cities.



Source: Google, 2017

We can be sure consumer affordability and accessibility to immersive mobile experiences is here to stay and since the provincial markets represent significant scale, the bottom of the mobile pyramid will instigate seismic change on an economic level. As a consequence of this rapid local adoption of 3G and 4G mobile packages, a multitude of new mobile ad-tech companies are being attracted to Thailand and this will continue to re-define e-commerce routes to market.

Since the way people all over the country look at content has shifted to the small screen, successful brands will need to both create a more personalized experience with consumers and re-new user experience through the use of more dynamic technologies embedded into devices. Significantly, technologies serving this evolutionary experience will hit the Thai market in 2018 with enhanced capabilities held particularly relevant in the different domestic markets. For example, Thais are very visual communicators, with a much higher propensity than in other markets to communicate only through photos, video, emoji and stamps rather than text.

Three things marketers need to consider:

1. Develop partnerships that produce mobile and social media platform-first story-telling experiences
2. Be as agile as you feel possible – find the social hooks with which to amplify messaging throughout social community vectors
3. Acknowledge there is no on-line and offline, only bottom line and finishing line

The new significantly improved and frictionless search experiences that are being launched through enhanced camera functionality provide a new dimensionality to the way Thais will be able to apply personalized emoji for example to their daily lives. Thailand may indeed lead the world in the evolution of communication based solely on emoji and stamps (no words at all) in both business communications, social media and direct interactions.

We will see the launch of new tools to track and analyse these visual only conversations that will allow brands to

track individual consumer behavior in real-time from mobile devices using local, tribal, geographic and individual literacies.



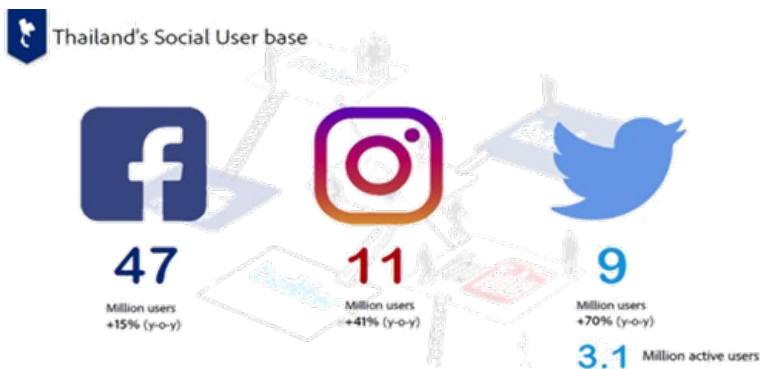
Source: OMD, 2017

More addressable media, disruption and opportunity

Addressability – driven by the twin forces of data and technology – is transforming the media and marketing business adding new layers of complexity, and opportunity. The opportunity lies in challenging some accepted wisdoms of the industry and reimagining everything from foundational planning principles, to the common industry perspective on data.

In the addressable age, agile brands have the ability to communicate with a mass of known individuals and adapt more quickly to evolving consumer behaviors. This dramatically changes how businesses can grow through addressing more market needs, more often, more flexibly, at lower costs of entry and lower costs per sale.

Social media platforms and chat apps form the backbone of mass media reach combined with addressable media elements which are lacking with linear television.



Source: OMD, assorted sources 2017

Clients' industries are being turned upside down by more agile brands built on this other reality. Brands that are experiencing accelerated growth and threatening the incremental growth long accepted by more established brands. See how Uber Eats is challenging fast-food services in Bangkok and Airbnb have challenged the established hotel chains and resorts.



Source: Google, 2017

In data we trust

By 2020 in Thailand all channels will be 'programmatic.' The core idea of marketing channels being accessible via an input like an API is a really important concept. Right now that's true of the social channels, and increasingly the rest of the digital marketing channels, but over the next two years we will also see traditional channels like outdoor screens, television and radio open themselves up to receive marketing assets programmatically.

Technology moves upstream. If you look at how technology has moved through marketing, it started at the edge (distribution of marketing assets) and has continued to move closer and closer to the actual planning and development of marketing itself. Over the next couple of years we will see technology complete this transition and become a part of the core fabric of marketing itself. No more search and social. As counterintuitive as it sounds, we will have witnessed these elements such as LINE having succeeded in fully embedding themselves into mainstream media and we will not feel the need to talk about it anymore. Walk around Bangkok or other towns today and no one mentions going 'online' because they are all always connected.

More reliable end-to-end attribution (or knowing exactly what messages and actions led someone to buy a product) will not only be a preserve for large multinationals with global tie-up with Google analytics but will emerge as affordable to a longer tail of mid-sized marketers. We have been talking about attribution for at least 80 years in marketing. New technology has given us much better data in some places, for instance, end-to-end attribution in search is a current reality. But for the majority of companies who sell goods in stores end-to-end attribution has remained elusive. Mobile wallet platforms that are taking off in Thailand now offer some compelling possibilities for solving this problem. Expect to see fast growth of mobile wallet services.

Big data becomes ever more personal: The potential value of well-collected, well-interpreted metadata is near limitless. Real-time updates of almost everything based on signals from mobile phones. Faster and more accurate public health measurement. Supply chain optimization Metadata will make more people's lives in Thailand better and many companies in Thailand are currently invested in the convergence agenda.

That said, Thailand's central 'Digital Transformation' agenda has received criticism for slow progress, but it will form a backbone scheme aimed at developing a more value-based economy as we approach the 2020 milestone. The key for marketers is to participate in this government led agenda productively and respectfully. Those who over-reach will get shut out.

Don't call me HAL

AI devices, however they are named (incidentally it's believed today generating the right name for an AI robot or system will be as critical as the functionality itself, since it will be the everyday interface between the brand and the Thai user) will be increasingly commonplace. AI will undoubtedly generate tremendous change in people's lives. And as AI becomes more commonplace – promising to ease and improve user experiences – it also opens new frontiers for brands to better connect with consumers, using technology to build a new kind of human relationship or 'brand butler' Big name brands introducing personalised 'talking AI speakers' systems like Alexa will need to rethink simple things like naming and the Thai preference for visual description in order to prosper.

The 2020 Media – Agency

The media agency is already evolving towards a new future that will look very different from today's advertising, branding, demand generation, field marketing, product marketing, partner marketing, and communications teams.

Instead, you will see the 2020 organisation centre on these pillars:

- **Data:** emanating from all those digital and offline consumer touchpoints.
- **Content:** to attract, engage and retain current and future customers.
- **Channels:** managing the ever-shifting landscape of options to reach their audience.
- **Technology:** to manage all that data and content flowing across channels.

Teams will need to be organised by 2020 to deliver data-driven audience planning, personalisation of content, strategic partnerships and a measurement approach defined in business outcome terms.

What will these companies make? For a start programmatically curated storytelling of a brand story that is worth following and will create chapters that evolve over hours / channels / micro-audiences.

This goal will become a byword for achieving success in an increasingly cluttered stack of proprietary technology and optimized trading environment with hundreds of thousands of publishers.

Marketers, emboldened often by their own direct relationships with the big technology companies (fostered at vast effort and expense by the likes of Facebook, Google, and Twitter) are beginning to suspect that in some cases they are driving the marketing innovation agenda, not their agencies.

The explosion of channels, the emergence of new technologies like wearables, and the connectedness happening with the 'internet of things' will combine all that content with data and technology to truly deliver on the promise of a seamless consumer experience.

What about the CMO of 2020?

Well, he or she will be focused on driving the kind of culture that delivers consumer centricity and agile data-solutions. The 2020 CMO will have a background or good understanding of data-science, ad and marketing technology, API connectors and be a technologist and a brand steward.

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