

THAILAND DIGITAL ADVERTISING SPEND 2024



KANTAR



SPEAKERS



Dr. Arapat Boonrod

Managing Director, Client &
Head of Growth, SEA
Kantar Thailand, Insights



Rajsak Asawasupachai

Managing Director,
IPG Mediabrands Digital/
Matterkind



Pacharee Permvongusawa

General Manager,
Publicis Media



Chanchai Pongsanan

Managing Director – Online
Supply-side Management /
Head of Performance
Marketing
Dentsu - Amplifi Thailand

Introduction

Thailand has been ranked as one of the countries with highest penetration rate for internet usage for years seeing that there are approximately 63.2 million internet users, representing 88% of total population, spending 8 hours a day on average in surfing on the internet, according to We are Social.

The penetration rate has increased over the past year for 3.27%, indicating the strong digital landscape. With a strong presence in an online world, Thai consumers have become 'omni-channel shoppers' or using both online and offline channels for FMCG product purchases with higher basket size in online platforms.

These trends render marketers to advertise in online platforms, leading to a continuous growth all along the past 10 years. In 2023, total digital spending grows at double-digit rate of 14% and it is expected to grow further at 8% in 2024.

In partnership with KANTAR, DAAT provides this data on a bi-annual basis.

**This report presents the data of the actual spend for 2023 and forecast 2024.*



Methodology

Market research consultancy firm KANTAR INSIGHTS THAILAND has collected and processed the data used in this report from 39 agencies via an online survey. The data is aggregated to reflect total levels, and split by type of digital advertising, platforms, and by industry. To maintain the confidentiality of all client information, all data is collected via an anonymous process and purely based on internal records of advertising spend.

About DAAT

The Digital Advertising Association of Thailand (DAAT) was founded in 2012 with the objective to benefit the industry, companies and consumers under the same direction. With collective support, advertisers should elevate the industry at the highest levels in the future.

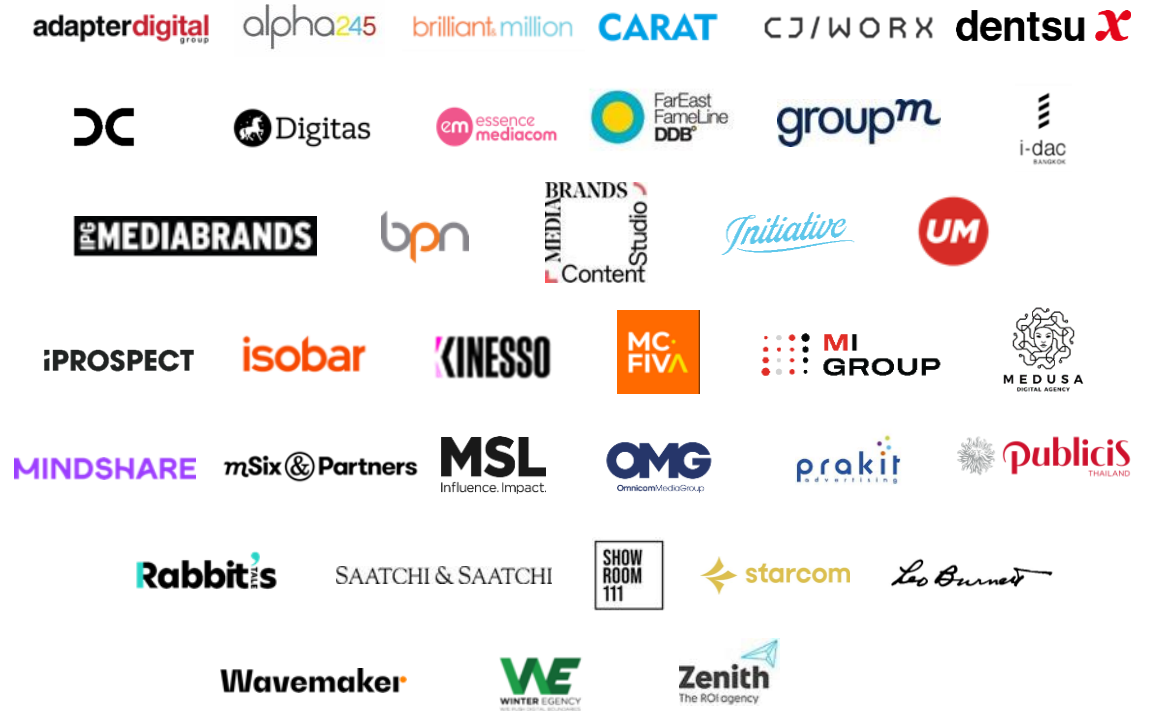
To support this objective the Association has been collecting and publishing digital advertising spending data since 2013. The reports keep track of the growth of spending on digital advertising in Thailand and are a valuable source of information to anyone in the advertising industry who wants to better understand the role of digital channels in the advertising landscape.



Agencies

The audit was conducted in January - February 2024.
Digital advertising spend data was submitted by 37 agencies.

- | | |
|---|---|
| 1 Adapter Digital | 21 MCFIVA (Thailand) |
| 2 Alpha245 | 22 Media Intelligence |
| 3 Brilliant & Million | 23 Medusa |
| 4 Carat | 24 Mindshare (Thailand) |
| 5 CJ WORK | 25 mSix&Partners |
| 6 dentsu X (Thailand) | 26 MSL |
| 7 Dentsu Creative | 27 Omnicom Media Group |
| 8 Digitas | 28 Prakit Holdings Public Company Limited |
| 9 EssenceMediacom | 29 Publicis Worldwide |
| 10 Fareast Fameline DDB | 30 Rabbit's Tale |
| 11 GroupM (Thailand) | 31 Saatchi & Saatchi |
| 12 i-DAC (Bangkok) | 32 Showroom111 |
| 13 IPG Advertising - Mediabrands | 33 Starcom |
| 14 IPG Advertising - BPN | 34 The Leo Burnett Group (Thailand) |
| 15 IPG Advertising – Mediabrands Content Studio | 35 Wavemaker (Thailand) |
| 16 IPG Advertising - Initiative | 36 Winter Egency |
| 17 IPG Advertising - UM | 37 Zenith (Thailand) |
| 18 iProspect | |
| 19 Isobar (Thailand) | |
| 20 Kinesso | |



Remark:

Reported numbers are based on reported spending data of a sample of 37 agencies. DAAT estimates that the sample of agencies represents 80% of spending in the market. The numbers presented on this page are upgraded proportionally to reflect 100% of the market.

66

Categories

deep dive to enable
opportunities for marketers

18

Disciplines

to explore digital trends

Disciplines

Agencies have provided spending data on the following 18 digital advertising disciplines:

Facebook Ads	All Facebook ads product, installed App ads, Facebook Audience Network, Facebook Messenger
Instagram Ads	Display or video ads bought only for Instagram (100% separated from Facebook)
YouTube Ads	All YouTube ads product including display, overlay, skippable/non-skippable video, sponsored card
Display	Google Display Network, website banners displayed on website or applications
Online Video	Non-YouTube/Facebook Video ads on website or online video streaming applications e.g., Ch3+, Netflix, Viu, oned
Creative Production	Online Video production, web banner production, application production, and service and management
Search	SEO, SEM, Mobile Search
Social	Content sponsorship, digital PR, advertorials, and influencers
LINE	All LINE ads product e.g., official account, LINE TV, LINE stickers, game
Native Ads	Paid ads that match the look, feel and function of the media format in which they appear e.g., feeds, search, widgets, promoted listing.
X Ads (Twitter Ads)	All types of Twitter ads that use to promote account, tweet or trend, including display and video format
Instant Messaging	All types of ads via instant messaging applications e.g., WhatsApp/WeChat/Kakao account/campaign management and push messaging application
Affiliate Marketing	All types of ads via automated marketing program leading customers to click on affiliate links including pay-per-click, pay-per-lead, and pay-per-sale.
TikTok Ads	All types of TikTok ads that use to promote account, TikTok Shop, including display and video format
E-Commerce	All types of ads booked on e-commerce sites/ platforms/ marketplaces, such as Shopee, Lazada, JD, etc.
Online Audio	Non-YouTube/Non-Facebook/Non-Line Audio ads on website or online audio streaming apps e.g. Spotify, Plern, Joox, Youtube Music
Live + Live Commerce	Live streaming to sell products instantly in any platforms e.g. Facebook, Instagram, TikTok, E-commerce (Lazada, Shopee)
Others	Other online advertising

Sub-Disciplines

Display
Display Direct
Display Ads Network
Display Programmatic
Online Video
Online Video Direct
Online Video Ad Network
Online Video Programmatic
YouTube Ads
YouTube Ads Desktop Display
YouTube Ads Mobile Display
YouTube Ads Desktop Video
YouTube Ads Mobile Video
Meta (Facebook Ads and Instagram Ads)
Facebook Ads
Facebook Ads Desktop Display
Facebook Ads Mobile Display
Facebook Ads Desktop Video
Facebook Ads Mobile Video
Instagram Ads
Instagram Ads Display
Instagram Ads Video
Live + Live Commerce
Creative
Creative Video Production
Creative Web Banner & App Production
Creative Social Media Platform Management
Creative App Production
LINE
LINE Direct
LINE Video
LINE Display
LINE Other
Search
Twitter
Instant Messaging
Social
Native Ads
Others
Affiliated Marketing
TikTok Ads
TikTok Ads Display
TikTok Ads Video
E-Commerce
E-Commerce Display
E-Commerce Video
Online Audio
Online Audio Direct
Online Audio Ad Network
Online Audio Programmatic

Industry Sectors

Agencies have provided data split by the following industry sectors of the advertised brands.

Category	Industry
Finance & banking	Banks
	Insurance
	Credit/Debit Cards
	Finance Services
Technology & Electronic	Communications & Devices
	Computers
	Audio/Visual Electrical Products
	Electrical Products (Non-Audio/Visual)
Food & Beverage	Alcoholic Beverages
	Non-Alcoholic Beverages
	Seasoning Products
	Snack Foods
	Dairy Products & Dairy Substitute Prod.
	Bakery & Chocolate/Wafers/Biscuits
	Dietary Products
	Vitamins & Supplementary Foods
	Foodstuffs
	Shops
Retail Shops	
Online Commerce	E-commerce Business

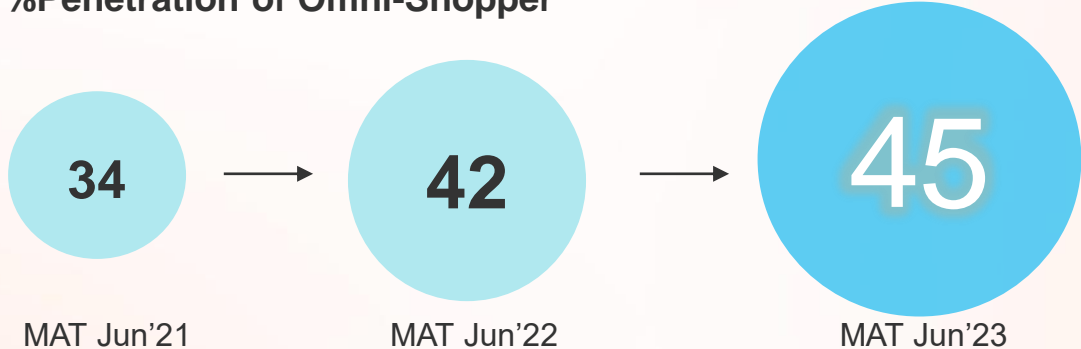
Category	Industry
Education	Educational Institutions
Clothing	Clothing & Underwear
	Footwear
Personal care	Cosmetics
	Skin-care preparations
	Personal Accessories
	Toiletries
	Hair Preparations
Household care	Oral Products
	Household Cleaners
Household care	Household Equipment & Furnishings
	Household Insecticides & Pesticides
Automotive	Motor Vehicle Accessories
	Motor Vehicle Dealers & Rentals
	Motor Vehicles
	Motorcycles & Bicycles
	Oil & Lubricants
	Petrol
Housing	Tyre
	Real Estate
Housing	Furniture & Furnishings
	Pet products
Travel	Transportation
	Travel & Tours
Pharmaceuticals	Pharmaceuticals
	Medical and wellness services

Category	Industry
Entertainment	Entertainment & Leisure
	CD/DVD (Musical & Film Products)
	Digital television, and other TV broadcasters
	Celebrity/artist management
Social media/ Application	Event management/ Exhibition/ wedding organizer/ event organizer
	Party, Karaoke, nightclubs, bars
Others	Social Media Applications
	Photographic Products
	Office/Business Equipment
	Sundries
	Multi Sections Advertising
	Media & Marketing
	CD/DVD (Musical & Film Products)
	Agricultural Products
	Building Material & Machinery
	Government & Community Announcement
	House Ads
	Classified
	Jewelry& Accessories
	Websites/Websites and marketplace

Added in FY 2024

Nearly half of the Thai consumers have become “omni-shoppers” for FMCG products, with higher basket size, sales growth, and number of shoppers for online channels.

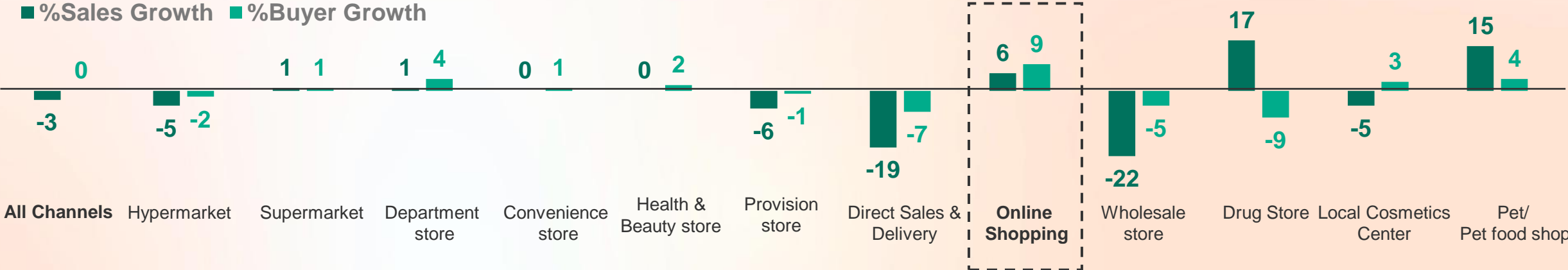
%Penetration of Omni-Shopper



Average spending per time (THB)



FMCG annual sales and # of buyer growth (% change) – MAT June 23 vs. YA



Point of view on Digital Marketing among Industry Leaders in Thailand

With this trend emerging, ensuring the seamless omnichannel strategy to connect with consumers at both channels can accelerate brand growth.



Chanchai Pongsanan

Managing Director, Online Supply-side Management / Head of Performance Marketing, Dentsu- Amplifi Thailand

Seeing that Thai consumers have become omni-shoppers, it necessitates marketers and brands ensure their seamless integrated marketing communication strategy to engage consumers in both online and offline platforms. Marketers should collaborate communications through both channels and monitor the performance with O2O measurement (online-to-offline and vice versa) since consumers normally compare prices between two platforms even if they are in front of the product shelves, so marketers need to introduce more tactical practices to stimulate offline purchases and utilize more data & insights gathered to effectively revise marketing plan accordingly.

The omnichannel strategy and omnichannel shoppers have taken place for a certain period, especially among retail businesses, but as driven by the pandemic, the trend has evolved considerably, resulting in a majority of Thai consumers now adopting this trend. Marketers should have a comprehensive understanding of the customer journey and devise an integrated communication plan at each stage via both channels. Even if online channels have become attractive and influential due to the variety of SKUs, experience at purchasing point still matters as consumers are using both channels at the same time.



Pathamawan Sathaporn
CEO, GroupM
(Thailand)

SPENDING

The 5 Highest Spenders

Skin-care preparation sector dramatically grows up in 2023, and continues to rise further in 2024, making it the top spender industry for 2 consecutive years.

All other top 5 industries are keeping a good momentum in both 2023 and forecasted 2024.





















FC

2021

2022

2023

2024

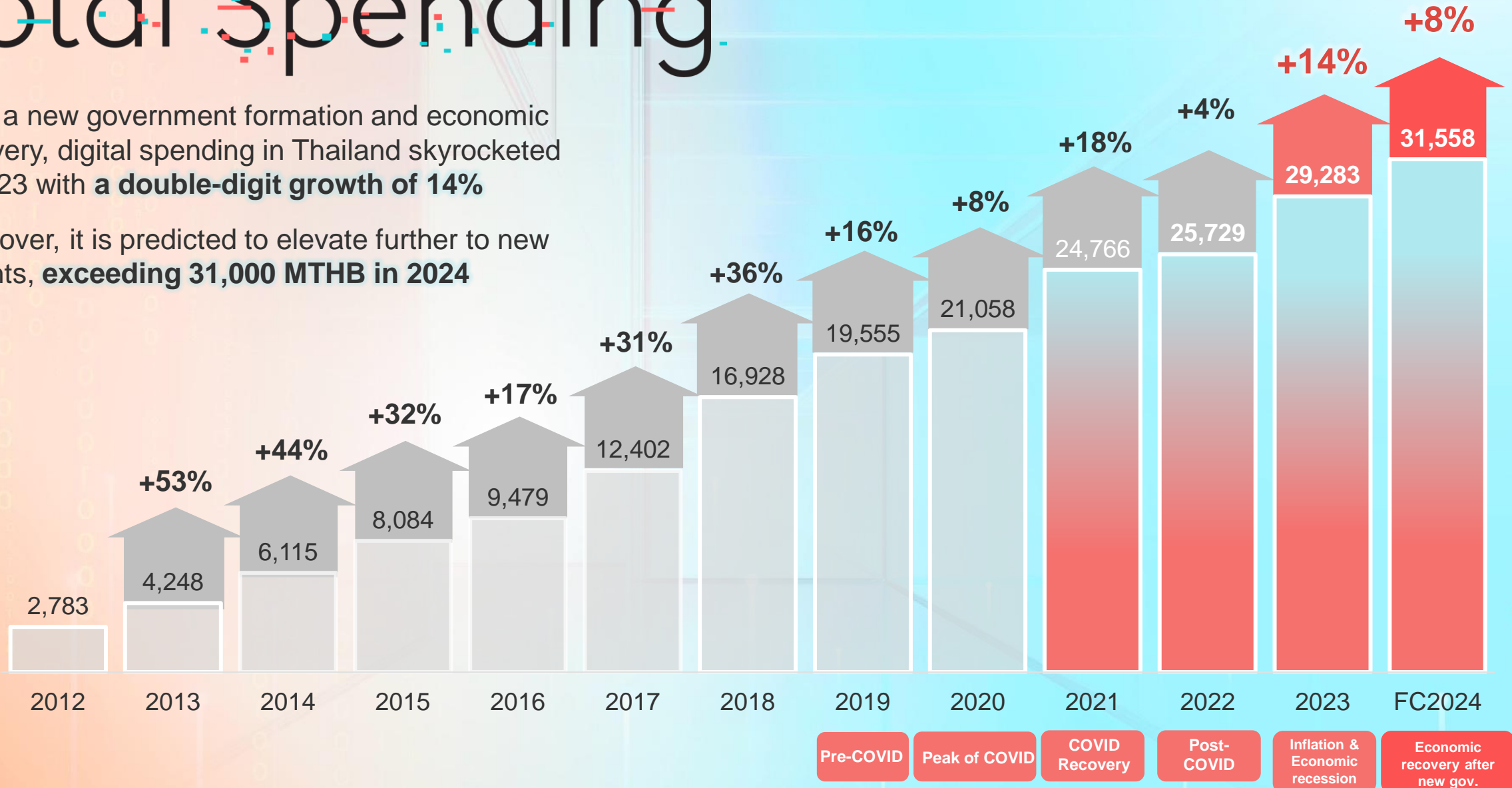
Motor Vehicles  2,897	Non-Alcoholic Beverages  2,535	Skin-care preparations  3,463	Skin-care preparations  5,040
Non-Alcoholic Beverages  2,680	Skin-care preparations  2,467	Motor Vehicles  3,000	Motor Vehicles  2,957
Communications  2,580	Motor Vehicles  2,414	Non-Alcoholic Beverages  2,393	Non-Alcoholic Beverages  2,548
Skin-care preparations  2,162	Communications  2,004	Communications  1,869	Communications  1,854
Dairy Products & Dairy Substitute Prod.  1,657	Dairy Products & Dairy Substitute Prod.  1,539	Dairy Products & Dairy Substitute Prod.  1,853	Dairy Products & Dairy Substitute Prod.  1,798

Total Spending

Unit in Million Baht

After a new government formation and economic recovery, digital spending in Thailand skyrocketed in 2023 with a **double-digit growth of 14%**

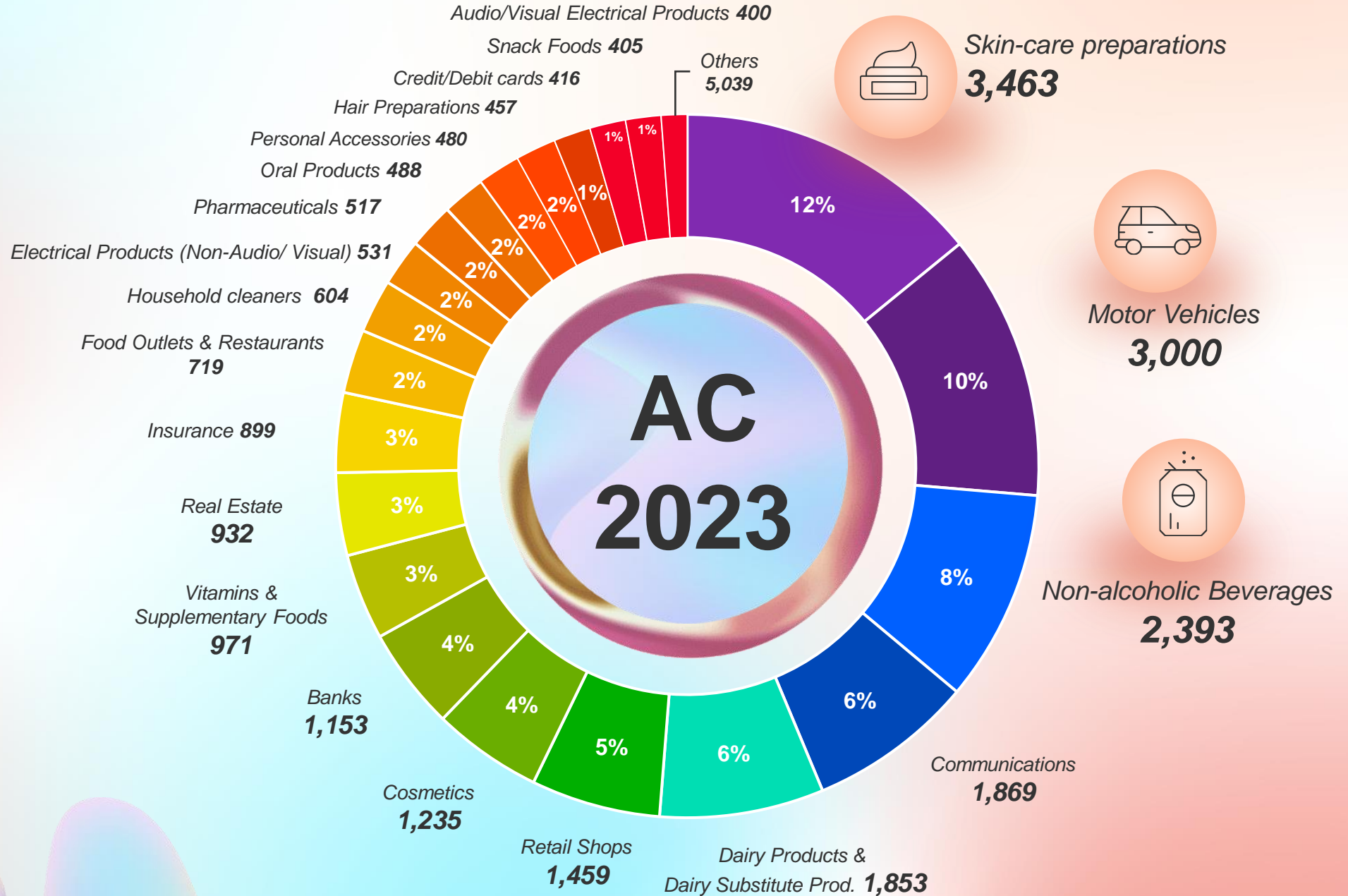
Moreover, it is predicted to elevate further to new heights, **exceeding 31,000 MTHB in 2024**



2023 Top Industry Spending

Skin-care preparations and Motor Vehicles far lead other categories in 2023, followed by **Non-Alcoholic beverages**

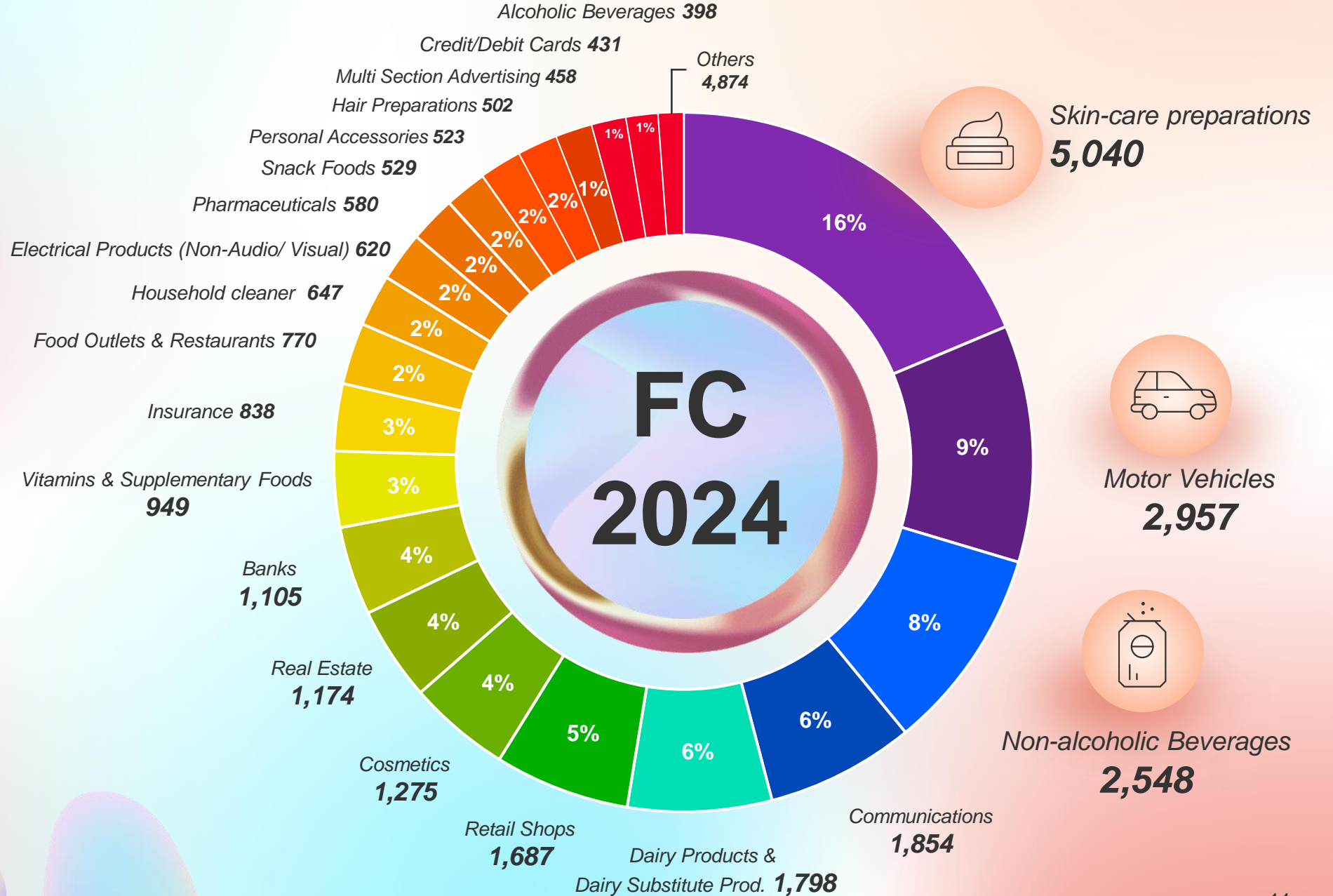
Household cleaners and Oral products have shown **an outstanding growth of 53% and 63%** respectively in 2023.



2024 Top Industry Spending

Overall, a positive momentum is predicted for most industries in 2024, especially for **Skin-care preparations**.

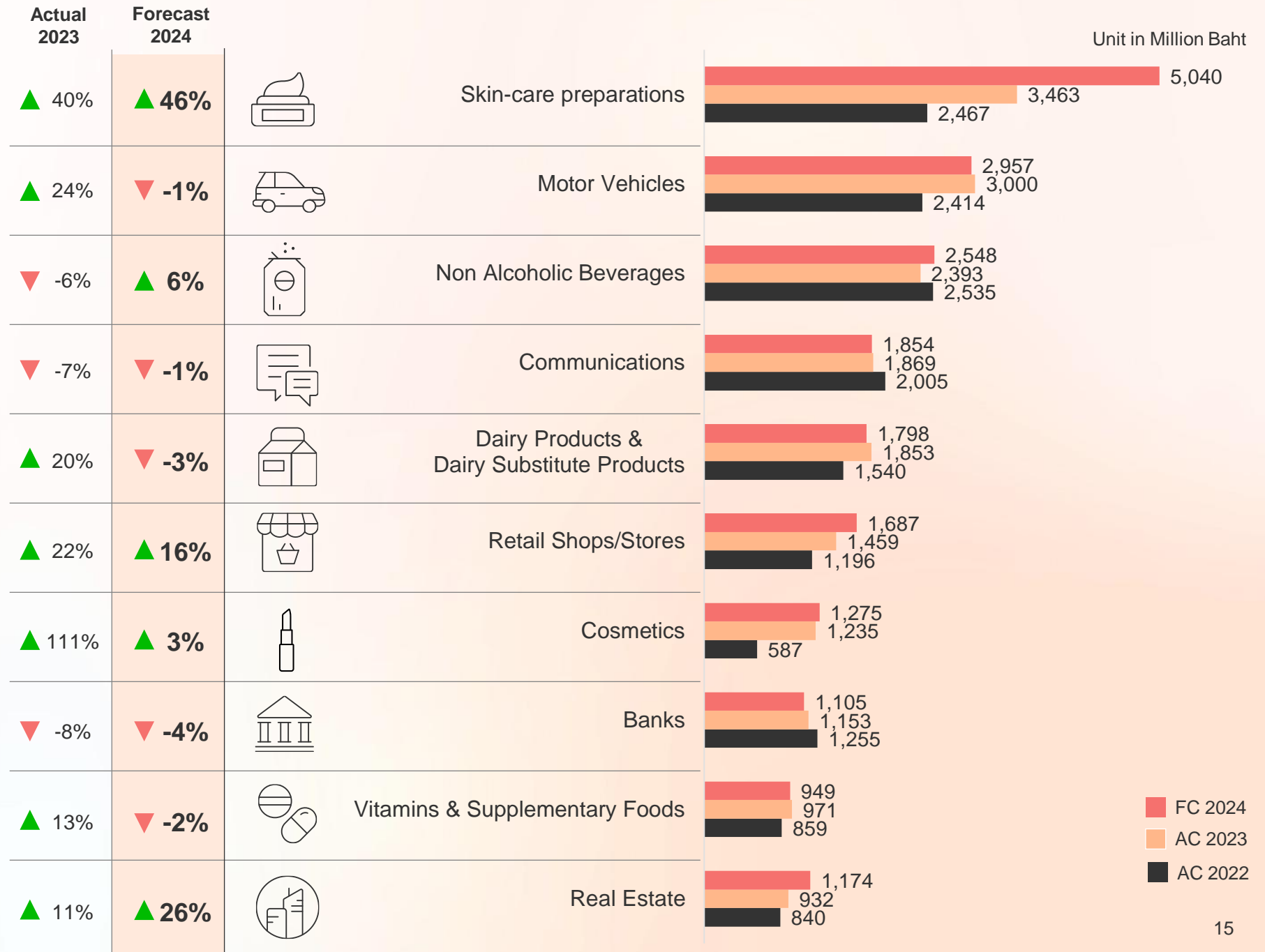
Some industries are expected to rise, such as **Multi Section ads (57%), alcoholic beverage (22%)**



Top 10 Spending Growth by Industries

A spectacular growth is seen among beauty & personal care products in both actual 2023 and forecasted 2024 – including **Skin-care preparations, Cosmetics, Vitamins & Supplementary Foods.**

Retails and Real Estate have made a robust growth while **Communications and Banks** remain stagnant.



DISCIPLINE

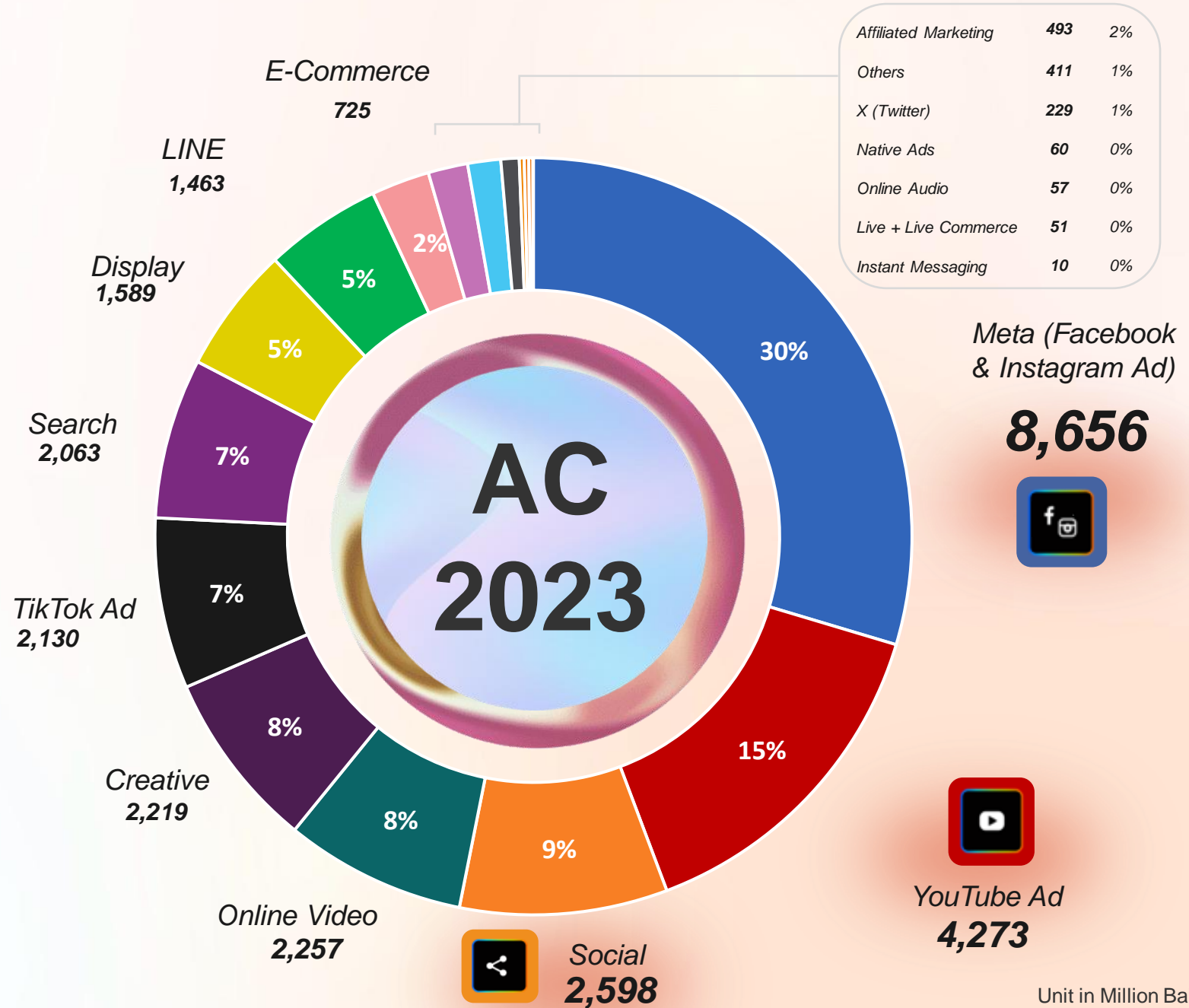


2023 Discipline Spending

Meta, still towers above other discipline despite a slight decline (-1%) in 2023.

YouTube achieves an impressive actual growth of **20%**, as predicted, reaching 4 billion again in 2 years.

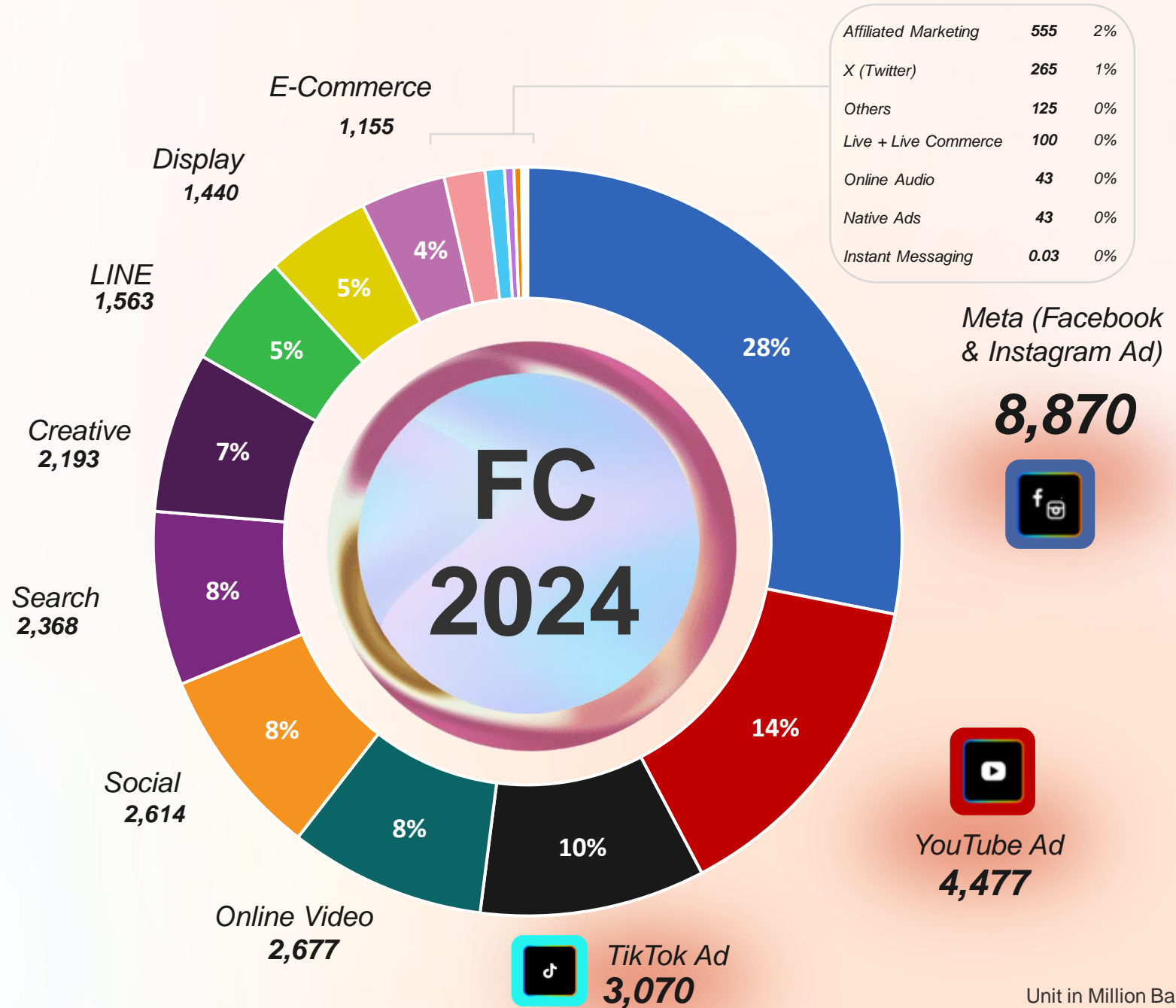
Social shows a notable growth of **18%** in 2023



2024 Discipline Spending

Meta is forecasted to see some increasing growth (3%). However, share of spending is predicted to decline from more usage in other disciplines.

Predicted spending in **TikTok Ad** continues to rise, reaching **3 billion THB** and becoming the 3rd top discipline in 2024.



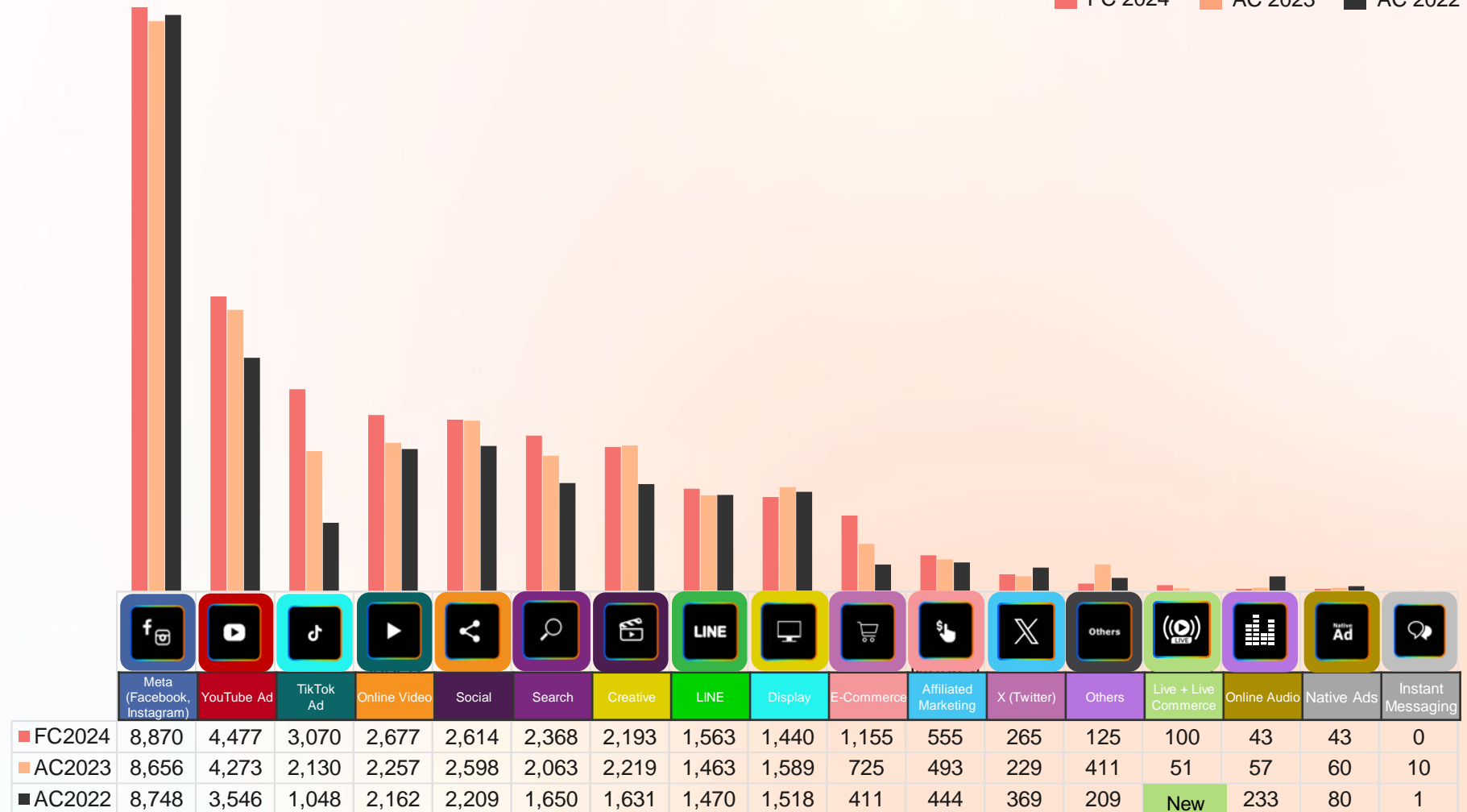
Top Spending by Discipline

Meta still holds the biggest share in spending, compared to other disciplines with a stagnancy in growth rate.

TikTok Ad, E-commerce, and Affiliated marketing still grow further at double-digit growth rate for both actual 2023 and forecasted 2024

Unit in Million Baht

FC 2024 AC 2023 AC 2022



2022 vs 2023 ▼-1% ▲21% ▲103% ▲4% ▲18% ▲25% ▲36% 0% ▲5% ▲76% ▲11% ▼-38% ▲97% N/A ▼-76% ▼-25% ▲924%

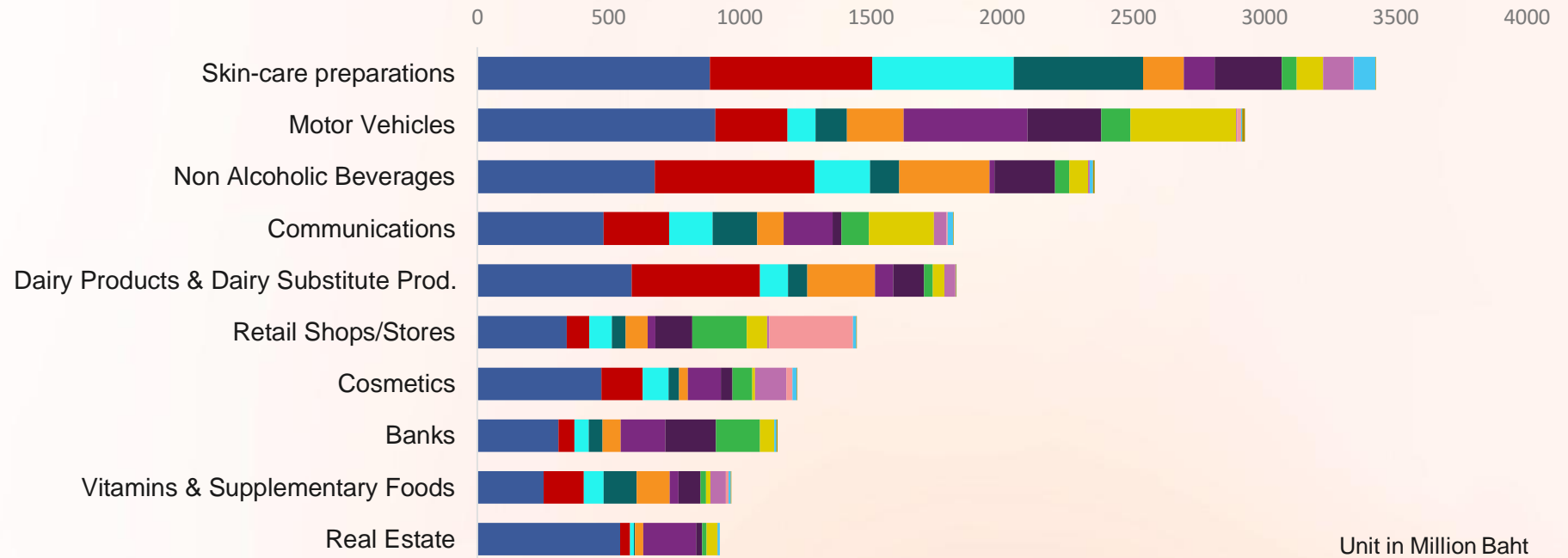
2023 vs FC 2024 ▲2% ▲5% ▲44% ▲19% ▲1% ▲15% ▼-1% ▲7% ▼-9% ▲59% ▲13% ▲16% ▼-69% ▲97% ▼-23% ▼-30% ▼-100%

Top Spending Industry by Discipline

Meta remains marketers' top choice in spending across industries.

YouTube is another alternative discipline for Skin-care preparations, non-alcoholic beverages, dairy products, and vitamins & supplementary foods

Retail shops/ store invest heavily in **Affiliated marketing, LINE and Creative**



Unit in Million Baht

Unit in Million THB	Meta	YT	TikTok	OLV	Social	Search	Creative	LINE	Display	E-Comm	Affiliated	X (Twitter)	Others	Live	Online Audio	Native	Total
Total AC2023	8,656	4,273	2,130	2,257	2,598	2,063	2,219	1,463	1,589	725	493	229	411	51	57	60	29,283
Skin-care preparations	887	620	539	493	154	118	256	56	100	117	1	83	34	0	3	2	3,463
Motor Vehicles	909	275	107	119	217	472	280	112	402	4	15	5	61	7	10	5	3,000
Non-alcoholic Beverages	676	610	212	110	344	19	231	55	70	6	1	12	39	0	6	1	2,393
Communications	483	249	165	171	100	188	33	105	246	50	4	20	12	35	1	7	1,869
Dairy Products & Dairy Substitute Prod.	589	488	108	73	258	70	117	33	45	41	2	1	26	0	0	0	1,853
Retail Shops/Stores	342	85	87	53	84	30	140	208	78	7	321	12	3	0	1	9	1,459
Cosmetics	473	157	100	38	34	126	45	75	10	119	25	15	17	0	0	0	1,235
Banks	310	60	55	53	69	170	192	169	54	0	0	9	6	0	4	2	1,153
Vitamins & Supplementary Foods	253	153	75	126	126	33	83	22	17	58	10	9	4	0	0	0	971
Real Estate	545	38	14	4	32	201	23	16	43	0	0	9	1	0	0	5	932

Unit in Million Baht

DISCIPLINE



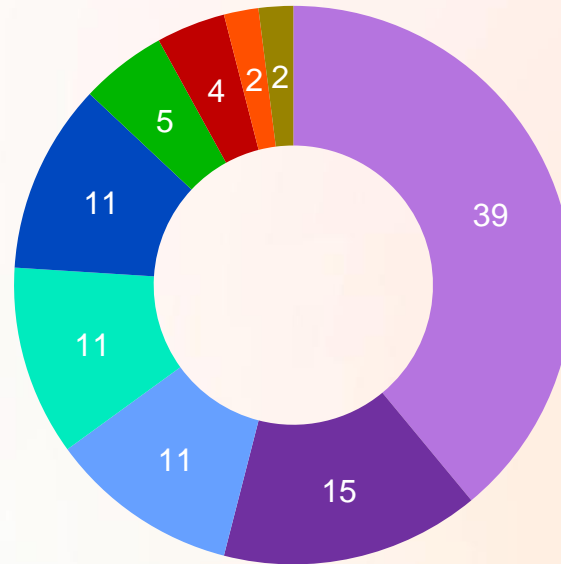
Digital Advertising Objectives

The primary objective of Digital Advertising remains to boost **brand & product awareness and reach while driving brand consideration** gains more proportion of budgets this year

While **Lead Generation and E-commerce** purposes seem losing momentum, **Live and Live Commerce** receives more budget this year.

What proportions of the budget are applied to each purpose?

AC 2023



FC 2024

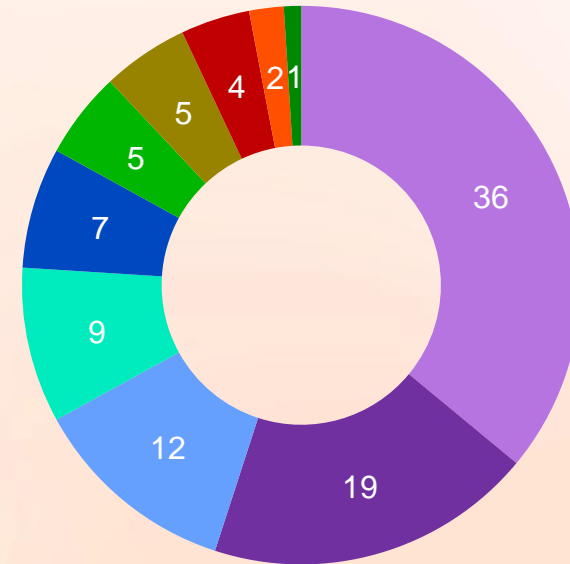


Fig in %

- Increase Brand / Product Awareness / Reach
- Brand Consideration
- Engagement Consumer
- Lead Generation
- E-commerce
- Drive sales to offline channel
- PR
- CRM & Customer service
- Live/Live Commerce
- CSR

Digital Media Tools

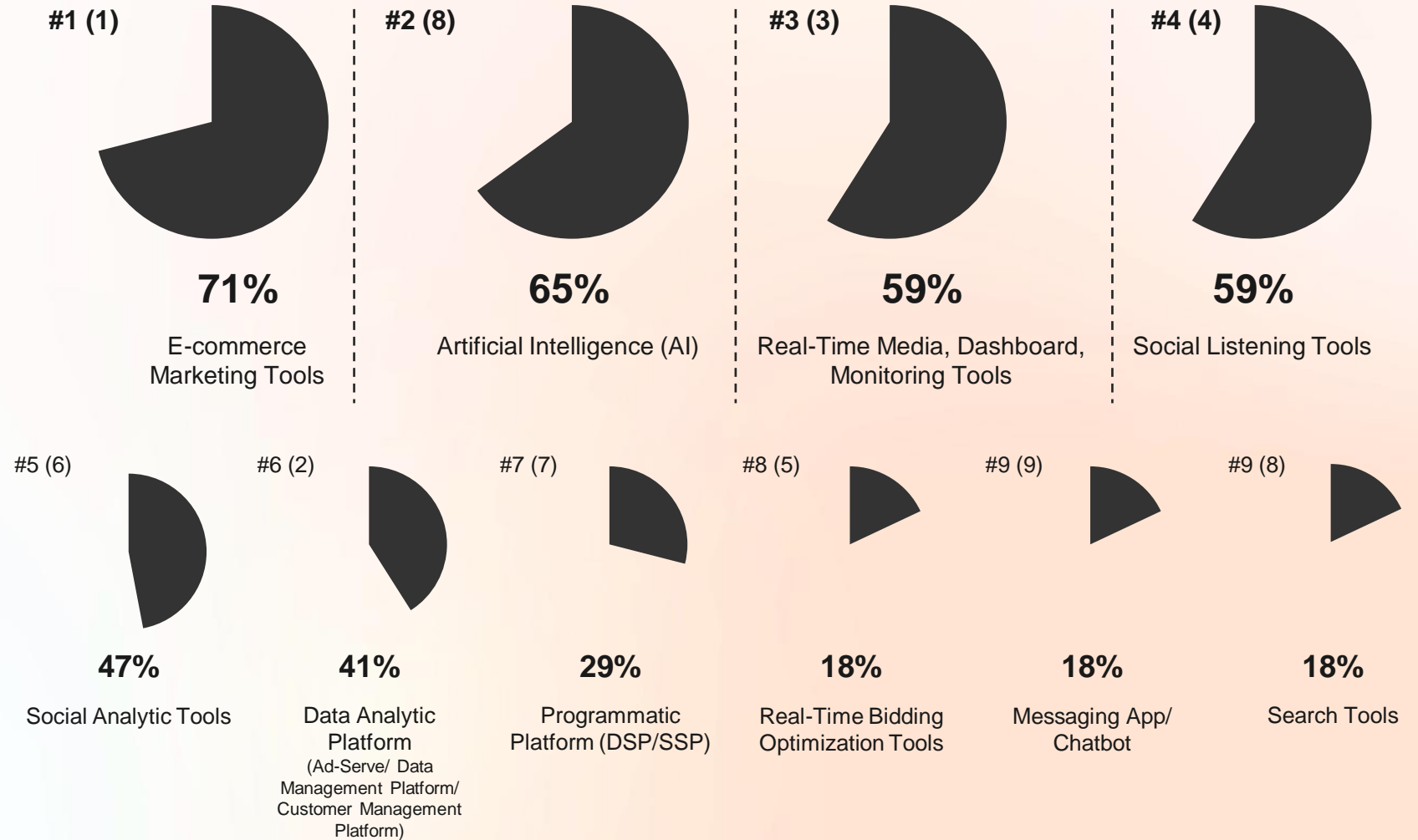
E-commerce marketing tools still towers outranks other tools for 4 consecutive years.

The interest and significance of **Artificial Intelligence (AI)** has increased dramatically in 2024, from 27% or 8th place last year to 65% (2nd place) this year.

Social Listening Tools and **Social Analytic Tools** also gain more importance and interest this year.

Which digital media tools do you think clients are most interested in and will play a significant role in 2024?

Fig in %



Base : All respondent (n=17)

2024 Importance Ranking
() 2023 Importance Ranking

Brighter outlook for Thailand Digital Advertising is expected in 2024, driven by economic recovery and growing digital landscape

Political Stability and more policies from the new government are believed to boost the national economy

The overall economic outlook following the election could influence business confidence and consumer spending patterns, which in turn would impact advertising budgets across all channels, including digital. A positive economic outlook may lead to increased advertising budgets, while economic uncertainty could result in more conservative spending approaches

The economy in Y2024 is forecasted to recover lately in Q2 after the political situation is stable in Thailand and changed in world economy. Hence, The overall digital spending will continuously grow, especially live commerce and E-commerce platforms.

Moreover, growing digital landscape and new technologies will foster greater spending in digital advertising

Opportunities in marketing and digital advertising in Thailand could arise from the country's growing digital landscape, increased internet penetration, and the adoption of new technologies. This may lead to a larger target audience and the potential for innovative marketing campaigns.

With the rise of mobile internet usage, mobile marketing strategies such as mobile ads, app advertising, and SMS marketing could offer significant opportunities for reaching and engaging consumers on their smartphones.

Additionally, the rise of e-commerce and mobile usage may create opportunities for targeted advertising and personalized marketing strategies.

However, dilemmas from technology advancement may necessitate marketers to respond effectively

Digital marketing agencies should start reducing manpower in manual work and investing more in AI, automation, and tools. Resources must be trained to make smart use of AI tools to generate data, insights, and even creative outputs. Agency transforms to be platform itself

Agencies will need to adapt to emerging trends and changes driven by innovation and technology. Recommendations include embracing AI and automation, prioritizing data-driven decision making, focusing on personalization and customer experience, integrating emerging technologies, enhancing measurement and analytics, collaborating with influencers, adopting a mobile-first approach, prioritizing content marketing and storytelling, fostering an agile mindset, and encouraging continuous learning and upskilling.

THAILAND

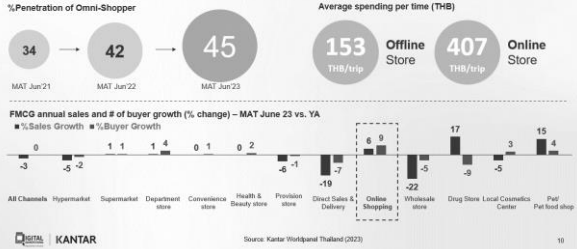
DIGITAL ADVERTISING SPEND

2024

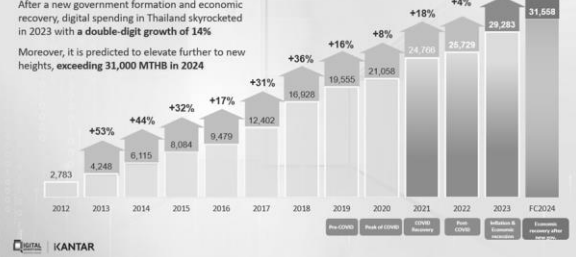


Full Report Snapshot

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Total Spending



The 5 Highest Spenders

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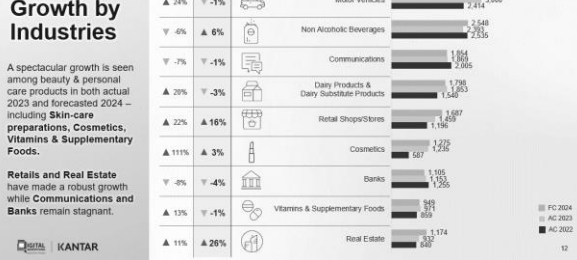
Industry	2021	2022	2023	2024
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Point of view on Digital Marketing Industry Leader in Thailand

Motor Vehicles is the largest spender on Meta since this platform is a good fit for the brands in this industry to target the right audience to maintain brand awareness and drive consumers' decision

It is important for motor vehicles brands to influence customers' consideration to induce action, i.e. right messaging and lead advertisements can help traffic to showrooms. The content is also able to drive results of car sales. Meta if (facebook) is suitable to increase awareness, consideration and drive action. Meta can reach the target well, as compared to other digital platforms. Client can do full-funnel marketing there, whether on Facebook or Instagram messenger.

Top 10 Spending Growth by Industries



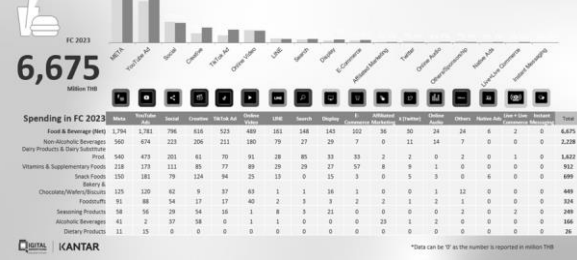
2023 Top Industry Spending



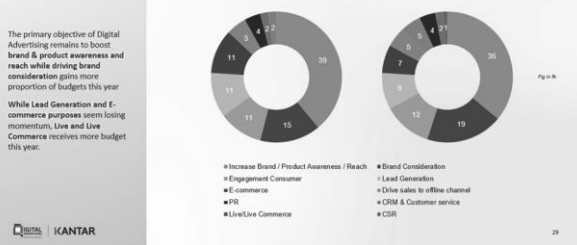
Skin-care Preparations



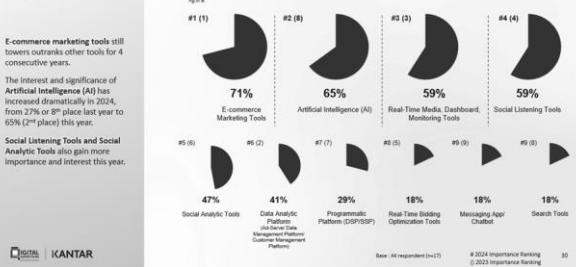
Food & Beverage



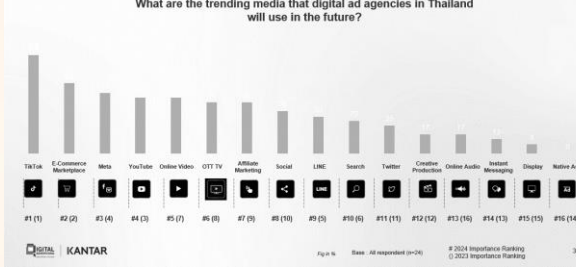
Digital Advertising Objectives



Digital Media Tools



Future trending media



Brighter outlook for Thailand Digital Advertising is expected in 2024, driven by economic recovery and growing digital landscape

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- Moreover, growing digital landscape and new technologies will foster greater spending in digital advertising.
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The economy in 2024 is forecasted to recover later in Q2 after the political situation is stable in Thailand and changed to slow economic recovery. The overall digital spending will continuously grow, especially by e-commerce and e-commerce platforms.

Agencies will need to adapt to emerging trends and changes driven by innovation and technology. Recommendations include embracing AI and automation, and tools. Resources must be trained to make smart use of AI tools to generate data insights, and even creative solutions. Agency transforms to platform itself.

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enhancing measurement and analytics, collaborating with influencers, adopting a mobile-first approach, prioritizing content marketing and storytelling, fostering and agile mindset, and encouraging continuous learning and upskilling.

Excel files with full report

							Display					
	AC2021 (total)	AC2022 (total)	AC2023 (total)	FC2024	Actual Growth (Y23 vs Y24 vs)	T.G. Growth (Y24 vs)	AC2021 (total)	AC2022 (total)	AC2023 (total)	FC2024	Actual Growth (Y23 vs Y24 vs)	T.G. Growth (Y24 vs)

RESPONDENTS
WTD. RESP.
TOTAL SCORE
INDUSTRY
Finance & banking (Net)
Banks
Insurance
Credit/Debit Cards
Finance
Technology & Electronic (Net)
Communications
Computers
Audio/Visual Electrical Products
Electrical Products (Non Audio/Visual)
Food & Beverage (Net)
Alcoholic Beverages
Non Alcoholic Beverages
Seasoning Products
Snack Foods
Dairy Products & Dairy Substitute Proc
Bakery & Chocolate/Wafers/Biscuits
Dietary Products
Vitamins & Supplementary Foods
Foodstuffs
Shops (Net)
Food Outlets & Restaurants
Retail Shops/Stores
Online Commerce (Net)

EXAMPLE ONLY

	TOTALS						1.Finance & banking (Net)					
	AC2021 (total)	AC2022 (total)	AC2023 (total)	FC2024	Actual Growth (Y23 vs Y24 vs)	FC Growth (Y24 vs)	AC2021 (total)	AC2022 (total)	AC2023 (total)	FC2024	Actual Growth (Y23 vs Y22)	FC Growth (Y24 vs)

RESPONDENTS
WTD. RESP.
TOTAL SCORE
SPENDING DATA (THB)
Display
Display Direct
Display Ad Network
Display Programmatic
Online Video
Online Video Direct
Online Video Ad Network
Online Video Programmatic
Online Audio
Online Audio Direct
Online Audio Ad Network
Online Audio Programmatic
YouTube Ad
YouTube Ad Desktop Display
YouTube Ad Mobile Display
YouTube Ad Desktop Video
YouTube Ad Mobile Video
META (FACEBOOK AD AND INSTAGRAM)
Facebook Ad
Facebook Ad Desktop Display

EXAMPLE ONLY

The full report will be available for purchase & download on April 17.

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For inquiries, contact:

Chonnikan Waiyawut
Pisit Jaturapun

Head of OM, PR & Marketing
Executive – Insights

Chonnikan.Waiyawut@kantar.com
Pisit.Jaturapun@kantar.com

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