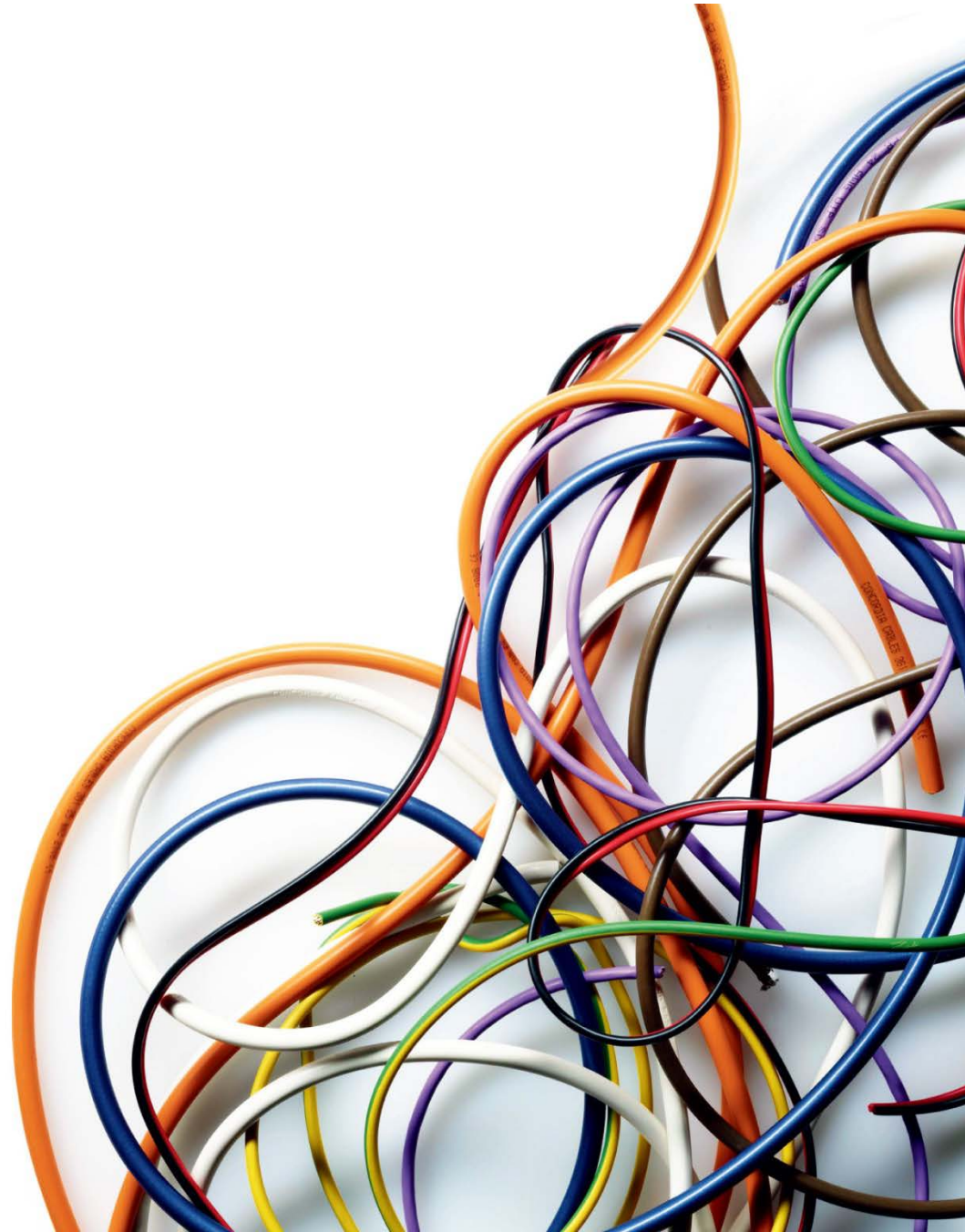




Thailand Tomorrow
Tech Trends 2015
What is the catch?

Commercial Advisory and Due Diligence
March 2014



“The Internet of Things” Proliferation across connected devices

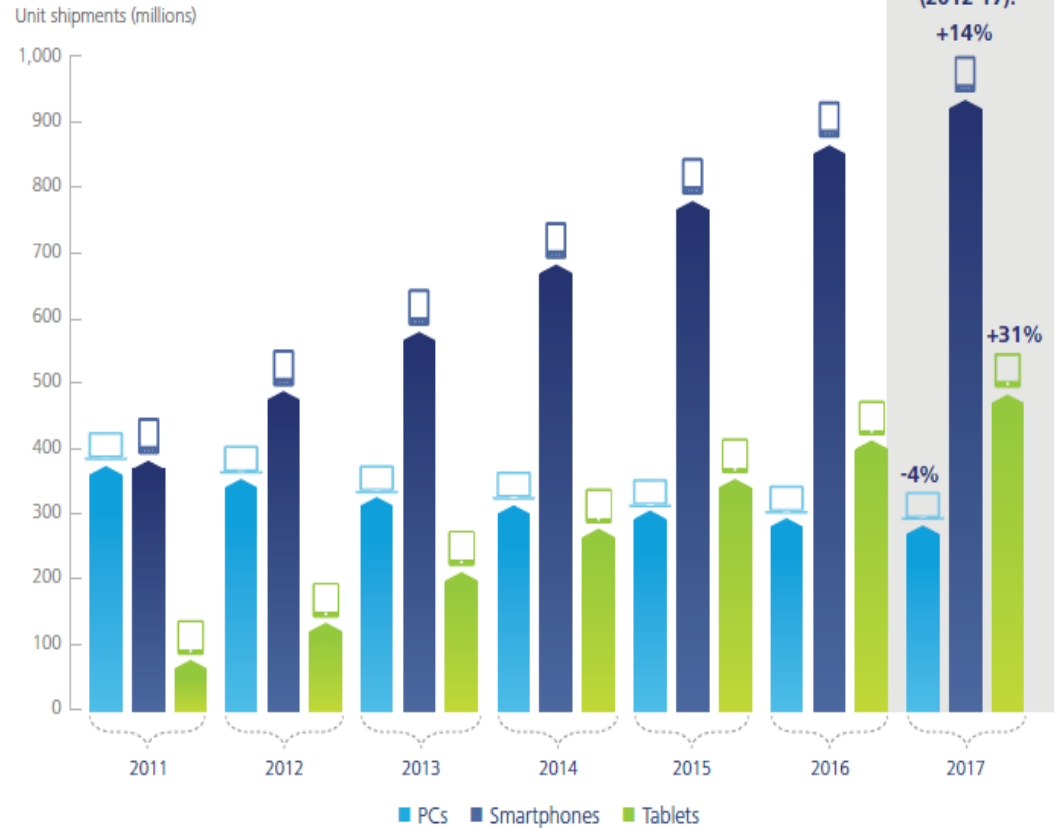
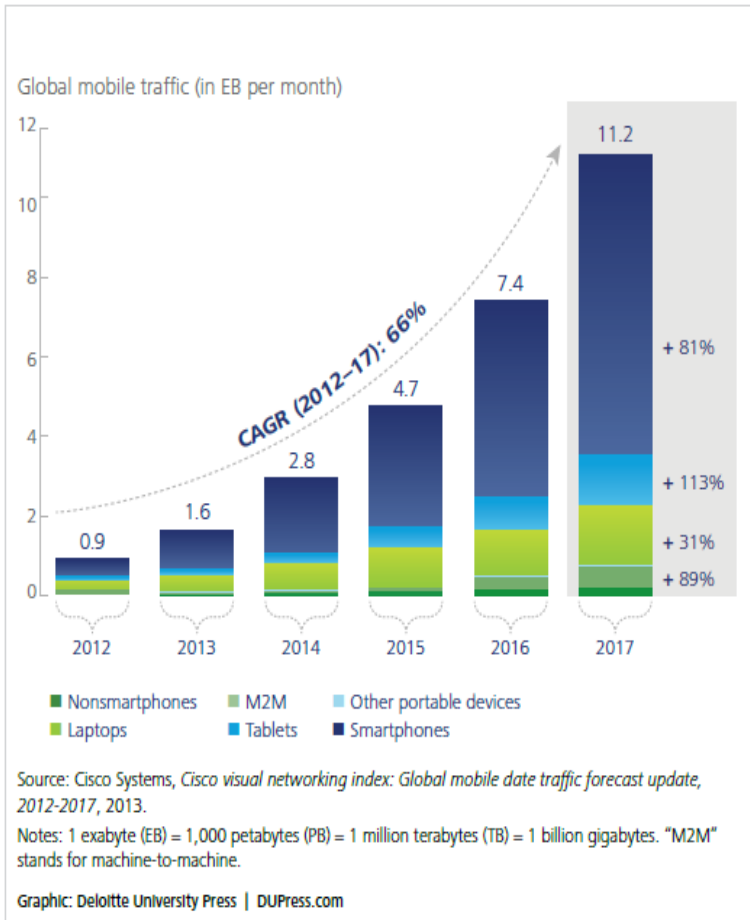


Source: Beecham Research, *M2M/IoT sector map*, 2013.

Mobile Traffic VS. Mobile Shipment

High demand for mobile broadband --> High mobile traffic --> High unit shipment

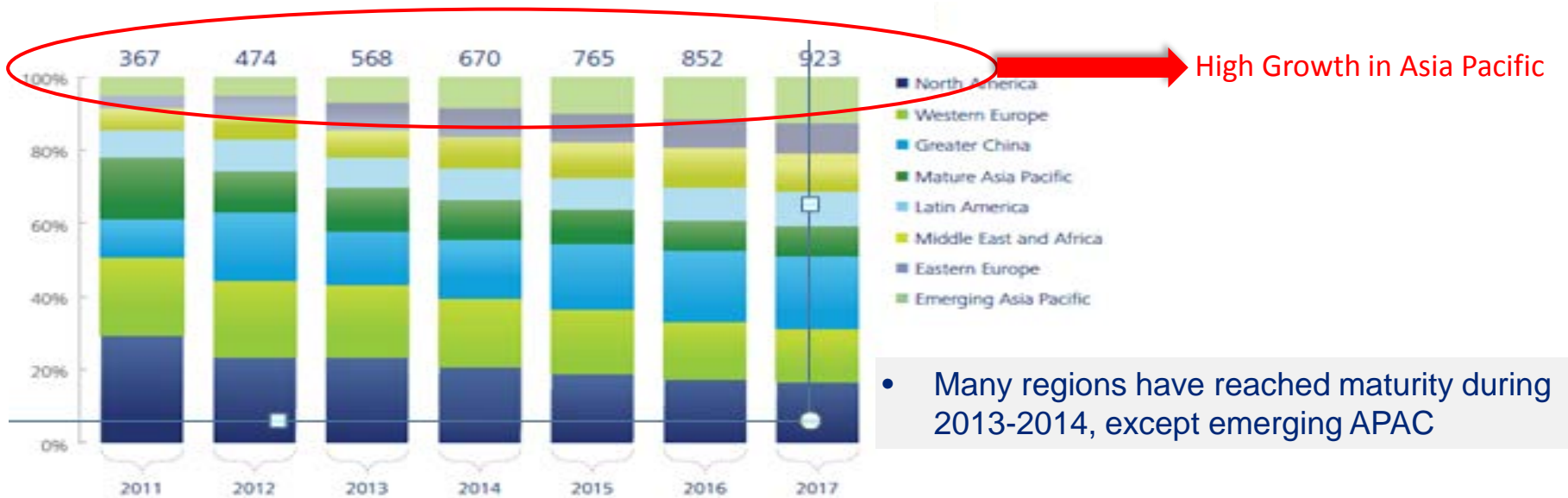
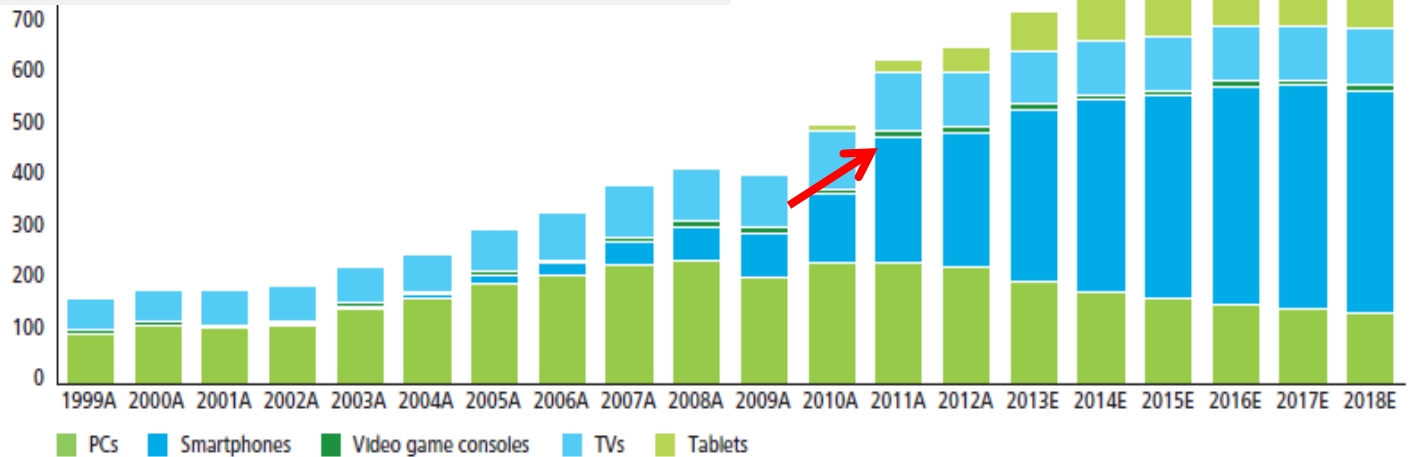
The growth of smart devices and tablets are at the expense of PC



Revenue jumped in the past few years, then became stabilized

Figure 1: Combined global sales revenues of smartphones, tablets, PCs, TV sets, video game consoles (1999-2018)

- No change in TV while PC keeps decreasing
- Tablets will reach maturity in 2014, while smartphones in 2017.



- Many regions have reached maturity during 2013-2014, except emerging APAC

Trends in Disruptors (1)

Disruptors

Opportunities that can create sustainable positive disruption in IT capabilities, business operations, and sometimes even business models.



Mobile Only (and beyond)

The enterprise potential of mobile is greater than today's smartphone and tablet apps

Mobile should be top of mind for organizations. But don't limit your ideas to Mobile First. Think *Mobile Only*, imagining an untethered, connected enterprise. The next wave of mobile may fundamentally reshape operations, businesses and marketplaces – delivering information and services to where decisions are made and transactions occur. And the potential goes far beyond smartphones and tablets to include voice, gesture and location-based interactions; device convergence; digital identity in your pocket; and pervasive mobile computing. The very definition of mobile is changing.



CIO as the Postdigital Catalyst

Catalyzing value from the elements of mobile, social, analytics, cloud and cyber

CIOs can lead the move to tomorrow – reshaping business as usual, and driving innovation. On the one hand, they face unprecedented opportunity for innovation. On the other, the existential threat of disruption. How should business respond? And who better to lead than the CIO? When CIOs harness the convergence of the five postdigital forces, they can change the conversation from systems to capabilities and from technical issues to business impact. Plan big, start small, fail fast, scale appropriately.

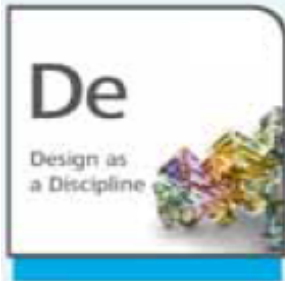
Trends in Disruptors (2)



Social Reengineering by Design

How work gets done is no longer constrained by 19th century platforms

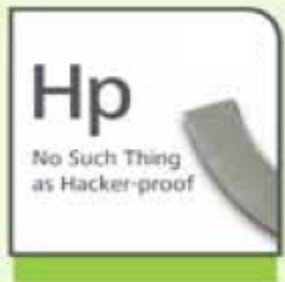
Businesses are no longer building technologies just to enable interaction – they are now engineering social platforms for specific context – platforms that can relieve rather than serve traditional organizational constraints such as deep hierarchies, command-and-control cultures, physical proximity and resource concentration. Social reengineering can fundamentally transform how work gets done, but it isn't just a "project." It's a strategy. And it's not serendipity. It's intentional – by design.



Design as a Discipline

Inherent, pervasive and persistent design opens the path to enterprise value

Driven by consumer experience, intuitiveness and simplicity are moving from IT aspirations to enterprise mandates. Design is not a phase; it's a way of thinking. Beyond look and feel, beyond user interfaces. Isolated in silos of user experience (UX), marketing and product development, individual design functions may be reaching their limits. What's needed is a collaborative, immersive environment to work together. Design is not just an "IT thing" or a "marketing thing" or a "product engineering thing." It's an *enterprise* thing.



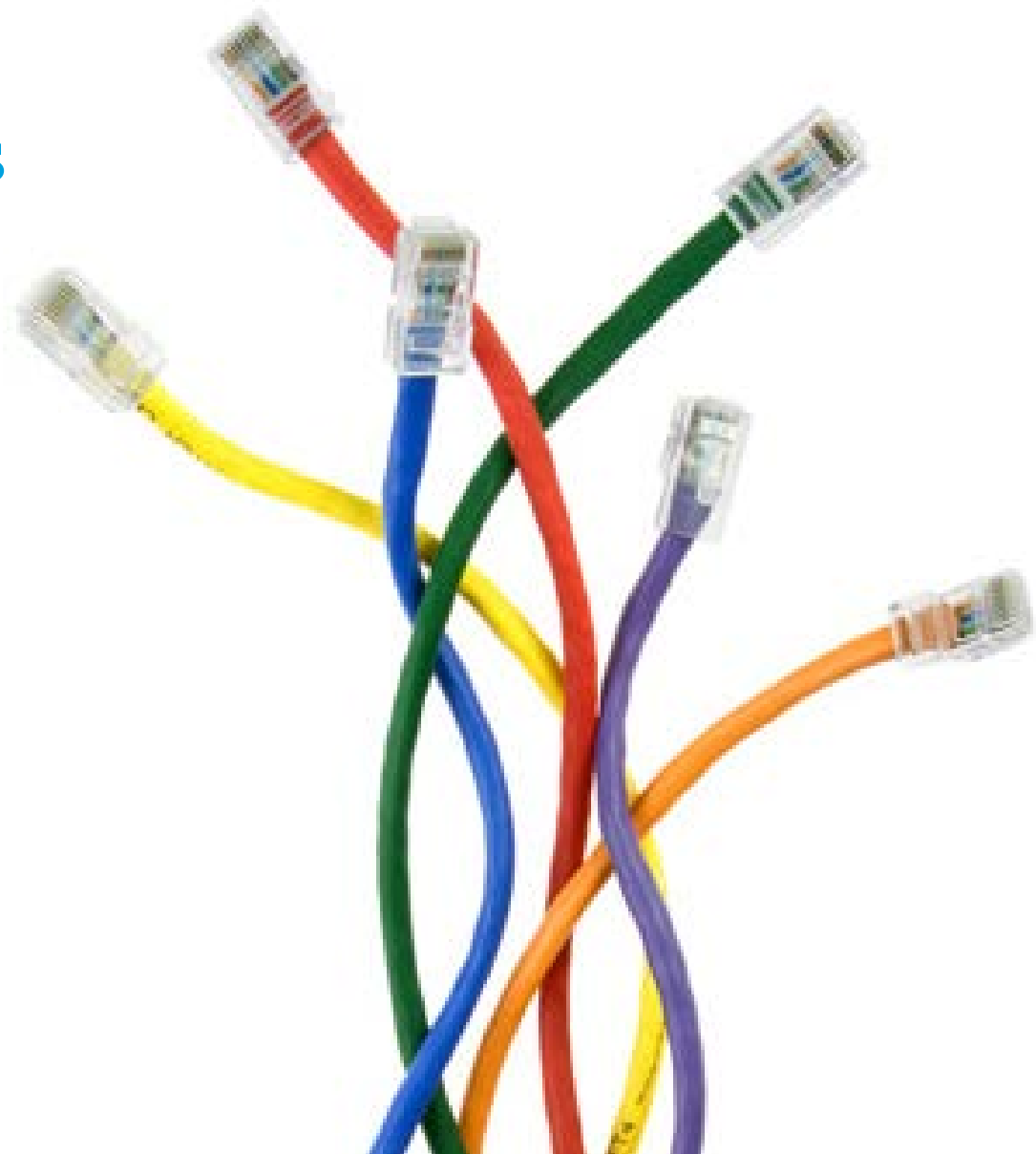
No Such Thing as Hacker-proof

If you build it, they will hack it. How do you deal with that?

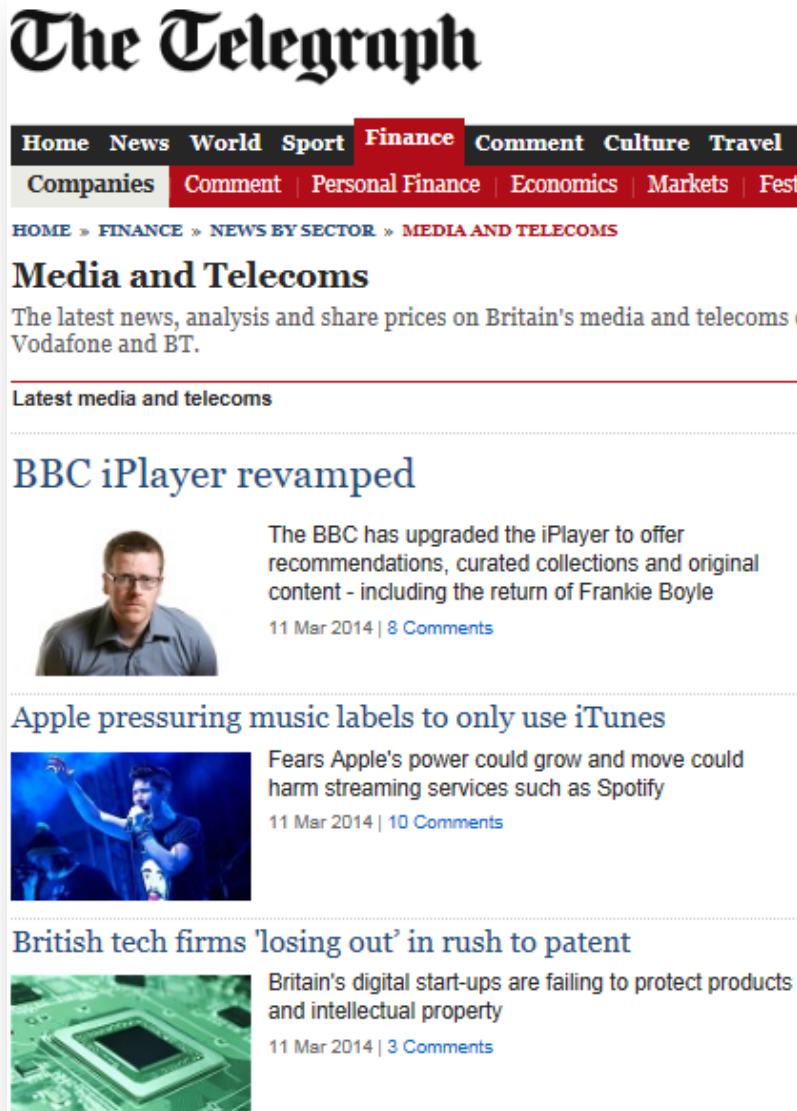
You've either been breached – or you soon will be. Your boss knows it, your business knows it, your board knows it, your customers know it, and hackers know it. It's your job to deal with it. That means changing the way you think about defending yourself. Be more proactive about the threat – and react more rapidly when breaches do occur. Detect them quickly, respond, clean up and adjust your tactics. Be outward-facing, prepared and ready in advance. Anticipate and prevent when possible, but be ready to isolate and encapsulate intrusions to minimize impact. It's better to lose a finger than to lose an arm.



Moving forward to digital media trends



A quick view: Digital media adoption news in markets



The Telegraph

Home News World Sport **Finance** Comment Culture Travel

Companies Comment Personal Finance Economics Markets Fest


HOME » FINANCE » NEWS BY SECTOR » MEDIA AND TELECOMS

Media and Telecoms

The latest news, analysis and share prices on Britain's media and telecoms companies including Vodafone and BT.

Latest media and telecoms

BBC iPlayer revamped



The BBC has upgraded the iPlayer to offer recommendations, curated collections and original content - including the return of Frankie Boyle

11 Mar 2014 | 8 Comments


Apple pressuring music labels to only use iTunes



Fears Apple's power could grow and move could harm streaming services such as Spotify

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British tech firms 'losing out' in rush to patent



Britain's digital start-ups are failing to protect products and intellectual property

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Entrepreneur

Startups Run & Grow Money **Marketing** Technology Franchises

Facebook Gives Advertisers a Way to Target by Relationship Status

BY LAURA ENTIS | February 21, 2014 | 1 Comment | Clip it

Share 0 | Share 49 | Share 23 | Send to Kindle | 49



thumbsup

Facebook อาจขึ้นเป็น digital ad seller รายใหญ่ที่สุดอันดับที่สองในสหรัฐฯ

วันที่: 23 December 2013
หมวดหมู่: Business, Social Media
ป้ายคำ: facebook

โซเชียลเน็ตเวิร์กยักษ์ใหญ่ที่ไม่มีใครไม่รู้จักอย่าง Facebook หลังเดินทัพพัฒนาช่องทางทำเงินโดยการเปิดช่องทางใหม่อย่างหลากหลาย ซึ่งก็สนับสนุนเขาได้ตลอดการทำ Video Ad บน Newsfeed ไปหมดแล้ว ล่าสุดจากผลการเก็บข้อมูลของอีMarketer ได้เผยผลออกมาว่า Facebook ได้ขึ้นเป็น digital ad seller รายใหญ่อันดับสองในสหรัฐฯ

จากผลการเก็บข้อมูลของ eMarketer ในปีที่ผ่านมา ทาง eMarketer ได้ประเมินมูลค่ารายได้ของ Facebook จากการโฆษณารายวันต่าง ๆ ว่าสามารถลดลงเหลือร้อยละ 3.17 พันล้านเหรียญสหรัฐฯ หรือ ประมาณ 1 แสนล้านบาท (103,643,150,000)



What is “Digital Media” ?

Digital Media

refers to a character of electronic media stored on digital media such as magnetic media, flash, and optical media. Those can be transmitted via internetworking communications and represented in several forms, for example, digital audio, digital video, digital photos and image, augmented reality, digital text format, and digital broadcasting.

Primary Classification

- Text or digital form of text or message
- Digital audio
- Digital video including streaming content
- Animation and graphic-rich / interactive media
- Still image including photos and digital arts

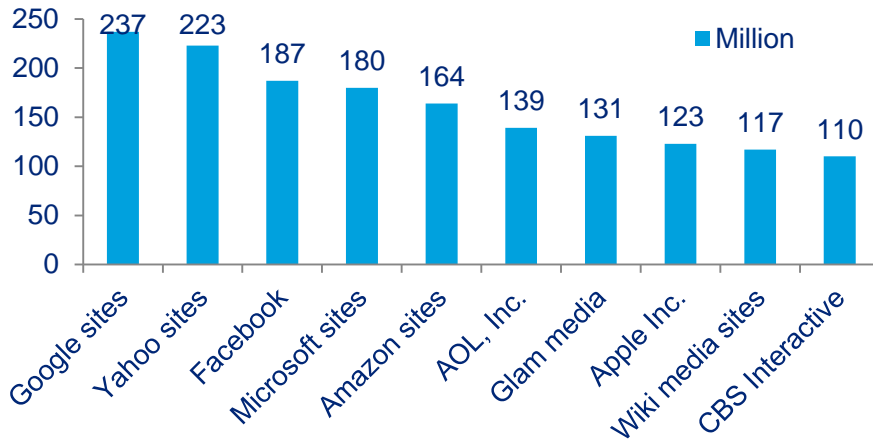
Secondary Classification

Due to consumer demands and industry’s adoption, digital media has been penetrated into different types of entertainment, social media, communication, and application. The following are example of secondary digital media in the market.

- Digital music
- Digital Ad (including Mobile Ad and Online Ad)
- Digital TV (Digital broadcasting, Pay TV, IPTV)
- E-book and e-magazine
- Online game and gambling
- Social media applications
- Other forms of OTT

Global market landscape: Digital media platforms growing everywhere

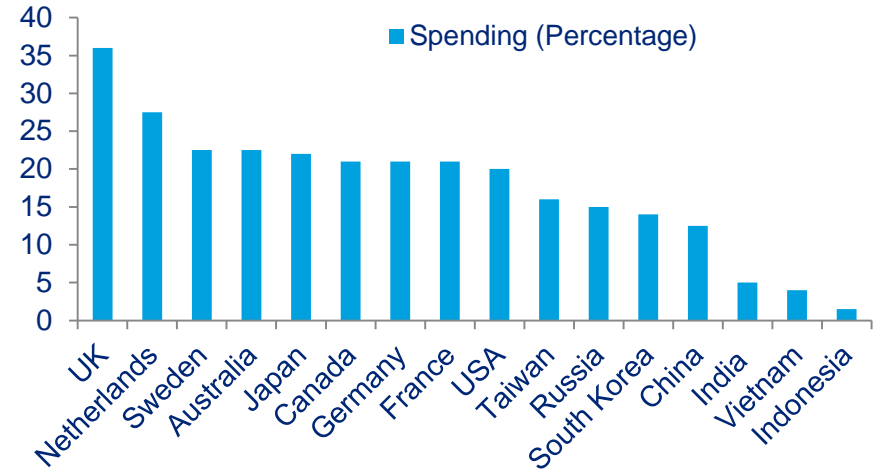
Top 10 Digital Media by Audience



Source: Com Score Media Metrix Multi-Platform, U.S. March 2013

- Consider at digital media reached by audience in US market, Google sites represented the top ranked of all digital media platform while Facebook is only social media platform ranked in Top 10.
- On the other hand, corporate web site, Microsoft represented No#5 of Top 10 digital media reached by audience follow by AOL Inc. and Apple Inc. respectively.

Total Digital Media Spending, 2011



Source: Tyroo Insights, 2012

- United Kingdom (UK) was the top digital media spender in 2011. The spending volume was higher than USA almost 1.5 times and 2 times when compared to China.
- This result has shown that number of population does not significantly impact to digital media spending.

Market landscape: Highlighted numbers

Global Digital Music Market Revenue, 2009-2013

Year	Market Size (US billion)
2009	4.2
2010	4.6
2011	5.2
2012	5.6
2013(e)	6.1

Source: BuddeComm based on IFPI, 2013

Global Advertisement Spending, 2010-2013

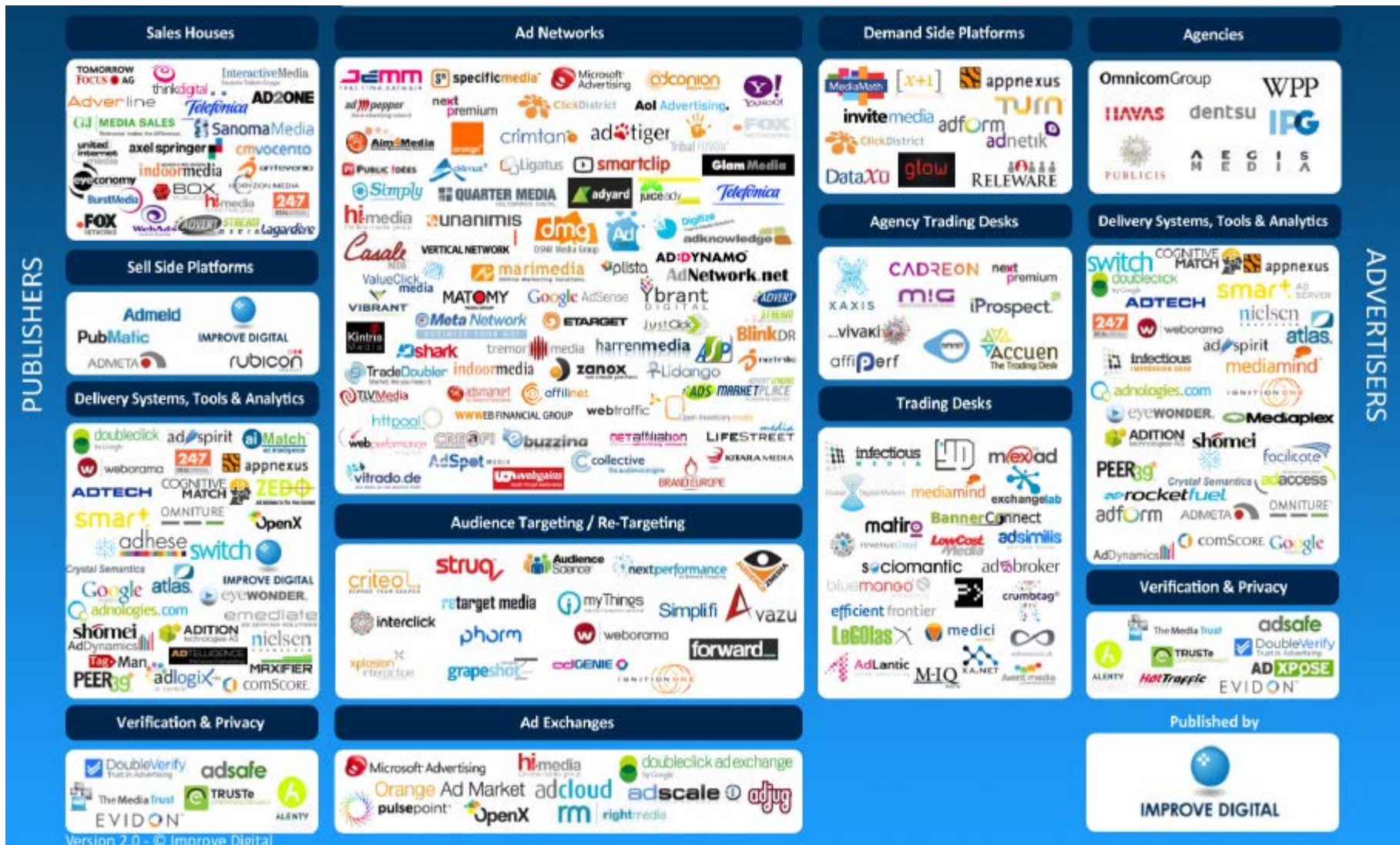
Year	Total Market Size (US billion)	Online-Ad Market Size (US billion)
2010	430	60
2011	445	69
2012	465	82
2013(e)	485	98

Source: BuddeComm based on Strategy Analytics, 2012

Snapshots

- Digital media market continues to grow over the year everywhere in the world. According to global advertisement spending table above, it is shown that online-ad spending is climbing with double digit growth since 2010, which is growing faster than total advertisement (all medias) market size.
- In addition, through Internet Package technology (IP), which is indicated to be an alternative digital broadcasting channel, number of IPTV subscribers has been growing up almost double every 2 years. This result presented strong growth and adoption of this type of digital media.

Current market ecosystem: Display ad



Source: Improve Digital, improvedigital.com



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