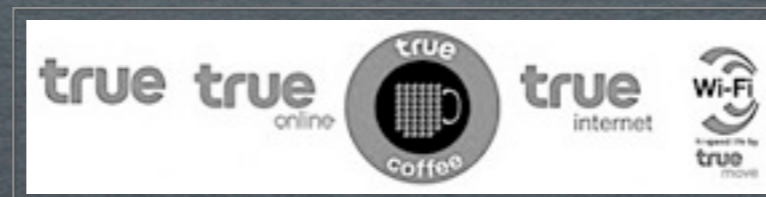


TRUE CORPORATION

M K 3 9 1 P R O J E C T



CONSUMER INSIGHTS

CONSUMER INSIGHT 1

- ✿ I'm an ordinary customer who have less information about the product details and my usage data.
- ✿ I want/ need to know which product packages provided suit my lifestyle the most so that it makes my connectivity optimize.
- ✿ But I can't/ don't because I have insufficient information for understanding the product package details and choosing the right one.
- ✿ So instead, I might have to pass a lot of annoying processes to get those information e.g., call center

CONSUMER INSIGHT 2

- ✿ I'm a person who has specific wants and needs to some certain products.
- ✿ I want/ need to pay only for what I actually want to consume.
- ✿ But I can't/ don't because it is too expensive and unnecessary to pay for the whole package and just some parts of them can satisfy my specific wants.
- ✿ So instead, I have to pay excess for product that just includes some of what I want or not consider consuming it at all.

CONSUMER INSIGHT 3

- ✿ I am a person who likes to hang out.
- ✿ I want to be able to do certain things outside with friends as conveniently as doing them at home. For example, listen to the group favorite music. Watch favorite soap opera and hang out with friends at the same time.
- ✿ But I can't/don't, because hang-out places such as cafes do not provide high-tech goods or if they do, they are catered for individual use rather than for the group.
- ✿ So instead, invite my friends home which can be inconvenient sometimes or have to choose between hanging out or staying at home.

CONSUMER INSIGHT 4

- ✿ I'm a person with fast living lifestyle.
- ✿ I want/ need convenient all-in-one bill for all products I use.
- ✿ But I can't/ don't because no company in the market think of introducing this all-in-one bill for the sake of consumers' convenient and the system of bill paying is still not compatible enough.
- ✿ So instead, I mess around paying for each separated bill

CONSUMER INSIGHT 5

- ✿ I am a person whose profession needs to keep up with the news.
- ✿ I want a media that give a thorough and technical analysis of the 'local news' based on solid theories/ knowledge that is consumable so I can judge them.
- ✿ But I can't/don't, because local media are either biased or give bad and shallow analysis. While more trust-worthy media such as the Financial Times write little about Thailand.
- ✿ So instead, I consume foreign media and apply the same thought process to analyze local news.

CONSUMER INSIGHT 6

- ✿ I am a person who like to write poem but does not know how to make music or the other way around
- ✿ I want to compose a song
- ✿ But I can't/don't, because I don't have all necessary know-how for composing a song.
- ✿ So instead, I only write poem (or play in the band).

CONSUMER INSIGHT 7

- ✿ I'm a working-age person with limited time
- ✿ I want/ needs qualified news and information as soon as possible as much as possible
- ✿ But I can't/ don't because, within limited time, I cannot examine quality of a number of information
- ✿ So instead, I spend most of my time searching for good quality sources and might end up with consuming information I really don't want

DISCONTINUITIES

DISCONTINUITY 1

- ✻ From... Doing one thing at a time
- ✻ To... Multi-tasking (Already occurring)
- ✻ Trends making up the discontinuity
 - ✻ People are having less and less time
 - ✻ Private households spend more and more. Private consumption has been increasing from 1235 billion bath in 1990 to 4992.5 in 2008 (Asian Development Bank).
 - ✻ People around Bangkok will travel more and more by either BTS sky train or MRTA metro. (Planned and ongoing projects of BTS and MRTA).
 - ✻ More and more people from rural areas are moving into the cities, especially Bangkok.
<http://www.kochangvr.com/thailandspopulation/buddhismreligioneducation.htm>

DISCONTINUITY 2

- ✿ From... “Connect to the society anytime is OK”
- ✿ To... “Anytime connection with society becomes necessary for being accepted”
- ✿ Trends making up this discontinuity
 - ✿ High mobile phone penetration
 - ✿ Growing portable internet market
 - ✿ less new customers
 - ✿ Mobile phones as social status indicator
 - ✿ less time with family
 - ✿ Growing mobile digital platforms
 - ✿ Growing e-book industry
 - ✿ Increasing online activities

DISCONTINUITY 3

- ✻ From... “Materialism as a way to represent social status”
- ✻ To... “Being Insider/ In trend is a way to represent social status”
- ✻ Trends making up this discontinuity
 - ✻ Higher education of people
 - ✻ More concern of news and situations
 - ✻ Online activities dramatically increase
 - ✻ Boom in online match-making
 - ✻ People spend more time on work/ less time for social life
 - ✻ People seek convenient and simplicity
 - ✻ Social status concerns
 - ✻ Increase women participation rate
 - ✻ Internet is the largest and cheapest sources of information

DISCONTINUITY 4

- ✻ From... “Self-Satisfaction concerns”
- ✻ To... “Environmental concerns”
- ✻ Trends making up this discontinuity
 - ✻ Gain environment concerns
 - ✻ More usage on environmental-friendly materials and products
 - ✻ Higher energy efficiency, alternative energy sources

DISCONTINUITY 5

- ✿ From... “Thai living lifestyle”
- ✿ To... “Fast living lifestyle”
- ✿ Trends making up this discontinuity
 - ✿ People moving toward cities
 - ✿ Average income increase
 - ✿ Higher education
 - ✿ Increase women participation rate
 - ✿ More companies are doing CSR

DISCONTINUITY 6

- ✿ From... Conforming to norms, culture and trends
- ✿ To... Friends' recommendations and individual point of views are more important in making decisions
- ✿ Trends making up the discontinuity
 - ✿ Increasing popularity of social networking websites
 - ✿ Increasing popularity of mobile internet usage
 - ✿ Mass media advertising become less effective
 - ✿ People put more and more trust into independent blogs but less and less in traditional media establishments

DISCONTINUITY 7

- ✻ From... Using internet for information purpose
- ✻ To... Internet as a convenient medium for daily activities
- ✻ Trends making up the discontinuity
 - ✻ Mobile phone applications become one of the main factors in consumer purchasing decision
 - ✻ Highly various application on sales by the third party developers
 - ✻ Increasing e-transaction in banking industry
 - ✻ Stock exchanges available on smartphones
 - ✻ Integrated business and presenting methods between personal computer and mobile devices
 - ✻ The rate of technological change is estimated to double every decade

DISCONTINUITY 8

- ✻ From... Linear choice-making
- ✻ To... Non-linear choice-making (Freedom in making choice independent of the line society/ family draw up for one)
- ✻ Trends making up the discontinuity
 - ✻ Higher education
 - ✻ More usage of public transport
 - ✻ People becoming health conscious
 - ✻ More concern on news and situations
 - ✻ Less baby, smaller family size
 - ✻ People seek convenient and simplicity
 - ✻ More female workers
 - ✻ Less time in social life
 - ✻ Boom in online match-making
 - ✻ More homosexual

ORTHODOXIES

ORTHODOXY 1

- ✱ The Company/The Industry believes that their target customers should be young adults/ couples or younger people
- ✱ Evidence/behavior supporting the orthodoxy
 - ✱ Ads; Mobile telecommunication (AIS, DTAC and TrueMove) as well as high-speed ISP (TrueOnline, TOT, 3BB) ads all aim at younger adults
- ✱ Why we think the company/industry has believes/follows this orthodoxy?
 - ✱ Communication is inherently technology based -- an attribute which traditionally would attract younger people while old people can be afraid of hi-tech products
- ✱ Preliminary opportunities that can come from overturning the orthodoxy
 - ✱ A big chunk of new customer group

ORTHODOXY 2

- ✿ The industry believes that...“Technological advance could bring about more awareness, sales and market share”
- ✿ Evidence/ Behavior supporting the orthodoxy... Competing on technological development
- ✿ Preliminary opportunities that can come from overturning the orthodoxy... Focus on other thing rather than being the most up-to-date technology providers

ORTHODOXY 3

- ✱ The industry believes that... “Larger size of customers and market are desirable for profit maximizing condition for firm”
- ✱ Evidence/ Behavior supporting the orthodoxy... Competing on price
- ✱ Preliminary opportunities that can come from overturning the orthodoxy... Gain more margin by focusing on other attributes rather than price

ORTHODOXY 4

- ✿ People think communication technology is harmful for physical social engagement
- ✿ Evidence/behavior supporting the orthodoxy
 - ✿ High-tech products are designed to be used when a person is alone
- ✿ Why we think the company/industry has believes/follows this orthodoxy?
 - ✿ Most technology-addicted people are not good at socializing. Most people use mobile device the most when they don't want to feel alone.
- ✿ Preliminary opportunities that can come from overturning the orthodoxy
 - ✿ Technology catered for social engagement purpose

COMPETENCIES

COMPETENCY 1

- ✿ The ability to deliver to customers... Follow ups on current trends/ More of what customers want. Ex. Panda TV following the Panda trend, later version of AF following the success of previous AF shows, out-of-season AF concerts or albums by previous AF artists.
- ✿ Utilizing the following SPTVANs
 - ✿ (S) Live broadcasting (V) Trendy Image (A) Cable TV, mobile telecom network, TrueMusic (N) ability to form ties with related companies/ institutions (the zoo, teachers for AF)
- ✿ As evidenced in the following landmark achievements
 - ✿ Success of AFs, a number of Panda TV watchers despite poor production

COMPETENCY 1 CONT...

- ✿ Delivering value/benefit to the customer...
More of what they want.
- ✿ Executing this competency in a superior manner compared to... Free TV
- ✿ And having defendability factors including...
Superior asset/ facilities which takes time to be built up
- ✿ But it hasn't been leveraged to its potential.

COMPETENCY 2

- ✻ The ability to deliver to customers... Convergence of communication, information and media

- ✻ Utilizing the following SPTVANs
 - ✻ (V) Trendy Image (A) TrueVision, TrueMove, TrueMoney, TrueOnline, fixed phone line (N) Networks with foreign TV shows, network with government, strong tie with CP group

- ✻ As evidenced in the following landmark achievements
 - ✻ Tie-in between TrueMove and TrueAF using TrueVision facilities

 - ✻ TrueMoney

 - ✻ TrueLife (Although extremely poorly put together)

COMPETENCY 2 CONT...

- ✿ Delivering value/benefit to the customer... An easy one-stop complementary provider
- ✿ Executing this competency in a superior manner compared to... Any other companies including Cable TV, internet, mobile
- ✿ And having defendability factors including... Wide range of business units
- ✿ But it hasn't been well-integrated and such practices might be violating the trade competition law.

COMPETENCY 3

- ✻ The ability to deliver to customers... Access to Online world as a complementary to offline world socializing experience
- ✻ Utilizing the following SPTVANs
 - ✻ (S) Making coffee that tastes good (V) Relaxing +unique atmosphere at some TrueCoffee (A) TrueCoffee, True Wi-Fi, 2.5G Network
- ✻ As evidenced in the following landmark achievements
 - ✻ Computers with internet access in coffee shops

COMPETENCY 3 CONT...

- ✿ Delivering value/benefit to the customer... A physical world anchored by access to online world
- ✿ Executing this competency in a superior manner compared to... True does not do very well because computers in TrueCoffee are for individual users not for group of people, thus, they do not help generating a pleasant atmosphere for socializing but act as a wall between people.
- ✿ And having defendability factors including... Superior Internet coverage of Wi-Fi, EDGE and ADSL