

Thailand Telecom Operators Country Intelligence Report

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Abstracts

Thailand Telecom Operators Country Intelligence Report

SUMMARY

Thailand Telecom Operators Country Intelligence Report, a new Country Intelligence Report by GlobalData, provides an executive-level overview of the telecommunications market in Thailand today, with detailed forecasts of key indicators up to 2024. Published annually, the report provides detailed analysis of the near-term opportunities, competitive dynamics and evolution of demand by service type and technology/platform across the fixed telephony, broadband, mobile, and pay-TV segments, as well as a review of key regulatory trends.

GlobalData expects Thailand's total telecommunications and pay-TV services revenue to reach \$14.2 billion in 2019. The total revenue will increase to \$16.3 billion in 2024, as mobile data and fixed broadband will be the key the segment driving growth in telecom market over the next five years. Fixed broadband revenues will increase significantly, at a CAGR of 8.9%, led by increasing investments by major operators in FTTH segment and the government's Rural Broadband initiative aimed at improving the overall broadband penetration level. Mobile data revenue will be driven by projected rise in mobile internet subscriptions and growing mobile data ARPU's

The Country Intelligence Report provides in-depth analysis of the following -

Demographic and macroeconomic context in Thailand.

The regulatory environment and trends: a review of the regulatory setting and

agenda for the next 18-24 months as well as relevant developments pertaining to spectrum licensing, national broadband plans, tariff regulation, and more.

Telecom and pay-TV services market outlook: analysis as well as historical figures and forecasts of service revenue from the fixed telephony, broadband, mobile voice, mobile data, and pay-TV markets.

The competitive landscape: an examination of the positioning of leading players in the telecom and pay-TV services market as well as subscription market shares across segments.

Company snapshots: analysis of the financial position of leading service providers in the telecommunications and pay-TV markets.

Underlying assumptions behind our published base-case forecasts, as well as potential market developments that would alter, either positively or negatively, our base-case outlook.

SCOPE

The Total telecommunications and pay-tv services revenue in Thailand will grow from an estimated \$14.2 billion in 2019 to \$16.3 billion in 2024, reflecting a CAGR of 2.7%. Mobile data and fixed broadband will be the key the segment driving growth in telecom market over the next five years.

Fixed broadband revenues will increase significantly, at a CAGR of 8.9%, from an estimated \$2.8 billion in 2019 to \$4.4 billion by 2024-end.

-Thailand's pay-TV market will decline at a CAGR of 0.2% over 2019-2024, due to projected decline in cable TV subscriptions and aggregate ARPU.

REASONS TO BUY

This Country Intelligence Report offers a thorough, forward-looking analysis of Thailand's telecommunications markets, service providers and key opportunities in a concise format to help executives build proactive and

profitable growth strategies.

Accompanying GlobalData's Forecast products, the report examines the assumptions and drivers behind ongoing and upcoming trends in Thailand's mobile communications, fixed telephony, broadband markets, including the evolution of service provider market shares.

With more than 20 charts and tables, the report is designed for an executive-level audience, boasting presentation quality.

The report provides an easily digestible market assessment for decision-makers built around in-depth information gathered from local market players, which enables executives to quickly get up to speed with the current and emerging trends in Thailand's telecommunications markets.

The broad perspective of the report coupled with comprehensive, actionable detail will help operators, equipment vendors and other telecom industry players succeed in the challenging telecommunications market in Thailand.

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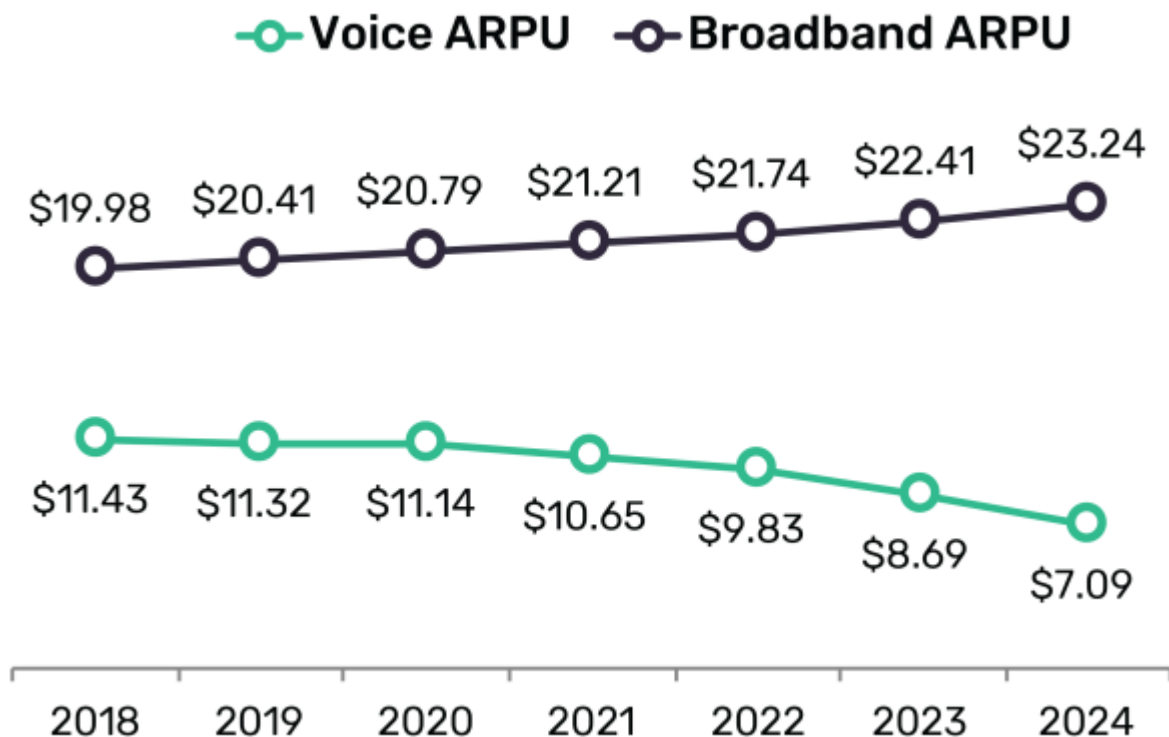
AIS
DTAC
True corp
CAT
TOT
3BB
TT&T

About

The total fixed telecom services revenue in Thailand is expected to grow at a compounded annual growth rate (CAGR) of 5.6% between 2019 and 2024, led by growth in the fixed broadband service segment, according to GlobalData, a leading data and analytics company.

GlobalData’s Thailand Telecom Operators Country Intelligence Report predicts that while fixed voice revenue will continue to decline, fixed broadband service revenue will grow at a CAGR of 8.9% during the forecast period, driven by the rising adoption of fiber-to-the-home (FTTH) services, which yield higher average revenue per user (ARPU) for the operators. Fixed broadband ARPU is projected to grow from about US\$20.41 in 2018 to US\$23.24 by the end of 2024.

Thailand: Fixed Services ARPU by Service Category, 2018-2024 (US\$)



Deepa Dhingra, Telecom Analyst at GlobalData, says: “The Government’s Universal Service Obligation (USO) initiative to deploy fiber optic network across 3,920 border villages in the country and the Net Pracharat initiative to strengthen the national broadband network by deploying high-speed Internet network covering 15,732 villages are expected to help drive the growth in fixed broadband subscriptions and boost the

fixed telecom services revenue in the coming years.”

Fixed voice revenues in the country are forecast to decline at a CAGR of 7.9% over the review period due to the continuous drop in circuit switched subscriptions and the overall voice ARPU.

Dhingra concludes: “While TOT Public Company Limited currently leads the fixed voice services market, in terms of subscriptions, it will be surpassed by TrueOnline in 2024 on account of its focus on voice-over-internet-protocol (VoIP) services. TrueOnline will maintain its leadership in the fixed broadband services segment through the forecast period, driven by its strong presence in the cable segment and focus on promoting FTTH convergence plans with speeds of up to 1 Gbps.”

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