

## **Fixed Broadband Market**

### **Subscribers and penetration Rates**

The fixed broadband market has been growing continuously in the past few years, with CAGR of 10.2% per year between 2008 – 2014. As of Q1/2015, there are 5,860,651 fixed broadband subscribers. This is equivalent to 8.7% population penetration rate, and 29.1% household penetrate rate. The number of fixed broadband connections as a percentage of fixed telephone connections is 100%

### **Market Structure and Market Competition**

The fixed broadband market has three main players, True Internet, TOT, and Triple T Broadband (3BB). Their market shares as of Q1/2015 are: True Internet 36.7%, TOT 24.7% and 3BB 29.9%. In addition, the remaining other operators have a combined market share of 8.7%

The HHI of the fixed broadband market has been declining steadily in the past four years. As of Q1/2015, the HHI is at 2,928.

## **Mobile Broadband Market**

### **Subscribers**

As of Q1/2015, The AIS group has approximately 20 million mobile broadband subscribers, which is equal to about 49.1% of the total number of AIS subscribers. DTAC has approximately 14.8 million mobile broadband subscribers, or 52% of the group's total subscribers. These numbers have a continuously increasing trend.