

Mobile Network Experience Report (May 2019)



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Summary

Thailand has continued its rapid rise up the global charts in 4G Availability, making LTE connections in the country pervasive — but mobile broadband speeds haven't followed the same trajectory. With one notable exception, overall upload and download speeds are either static or declining among Thailand's operators. There are some signs that this trend may be reversing though. DTAC's Download Speed Experience score has been rising over the last 12 months, showing that one operator has made boosting the power of its users' connections a priority. That may just provide the competitive motivation AIS and TrueMove need to focus on boosting their users' average speeds as well.

Key findings

DTAC jumps into the lead in Download Speed Experience

DTAC has toppled TrueMove from its download speed pedestal. Over the last six months DTAC's Download Speed Experience score increased by more than a megabit while TrueMove's score dipped slightly, allowing DTAC to win this award for the first time. TrueMove, however, maintained its superiority in our upload metrics, winning our Upload Speed Experience award with room to spare.

TrueMove and DTAC are neck-and-neck in Video Experience

TrueMove and DTAC were tied in our Video Experience metric, both with scores in the Fair range (40-55) of our 100-point video quality scale. AIS, however, fell into the Poor range with a score of 37.5.

AIS holds onto our 4G Availability award

AIS's high level of 4G Availability remained steady since our last Thailand report with a score just a fraction of a percentage point shy of 90%. We typically see 90% or greater 4G Availability scores in early adopter countries with extremely developed 4G networks. Thailand's other two operators weren't far behind the leader, though, both with 4G Availability scores above 86%.

Thailand remains focused on 4G reach instead of speed

As 4G Availability keeps climbing, Thailand is set to join the world's elite in 4G reach, but the same can't be said for mobile broadband speeds. With the exception of DTAC, 4G Download Speeds continue to decline in Thailand, while 4G Upload Speeds are either falling or remaining static for all three operators, according to our analysis. For the moment at least, Thailand seems committed to expanding access to LTE rather than on providing powerful mobile broadband connections.

National Analysis

4G Availability

The level of 4G access in Thailand continues to improve. Since our last report, we recorded increases in 4G Availability from two operators. DTAC's 4G Availability score grew more than 3 percentage points to 86.7%, while TrueMove's score grew by 1 percentage point to 87.2%. AIS's 4G Availability remained static over the last six months at about 89.9%, but its strong position in this metric allowed it to maintain its position at the top of our availability rankings.

All three major operators in Thailand are now closing in on 90% 4G Availability, which would mark a major milestone in the country's mobile broadband development. Around the world, operators who have crossed the 90% mark tend to be among the early adopters of LTE technologies and have very mature 4G rollouts. In short, Thailand is beginning to assume a place among the world's elite in 4G reach.

Video Experience

The consumer mobile Video Experience in Thailand is in need of improvement as no operator scored particularly well in this category. DTAC and TrueMove were tied for our Video Experience award as both had scores above 47 in our 100-point video quality scale. That earned them both Fair (40-55) ratings, which generally indicates slower video loading times and more frequent stalling during playback, especially at higher resolutions. AIS, however, garnered a Poor rating (0-40) with a score of 37.5, which generally indicates long load times and a high rate of stalling at both low and high resolutions.

When we look at 4G connections only, we see Video Experience was definitely better for all three operators, though TrueMove and DTAC's matching 4G Video Experience scores of 54.2 weren't enough to elevate either into a Good rating (55-65). AIS, however, did join its rivals in Fair Video Experience territory when we looked at 4G tests only.

Download Speed Experience

For the last several reports TrueMove has dominated our speed metrics, but in the last year we've been tracking some significant gains in Download Speed Experience from competitor DTAC. In our most recent data collection period, DTAC's progress in this metric was enough to overtake its rival. DTAC's Download Speed Experience score increased by 1.1 Mbps to 7.6 Mbps, while TrueMove's score fell incrementally. The combination of the two trends pushed DTAC over the top in our rankings. DTAC's Download Speed Experience is definitely benefiting from its improved 4G Availability, but DTAC is also investing in LTE network capacity by launching new 4G services in the 2300 MHz band. According to DTAC's 2018 annual report, it has rolled out more than 12,000 base stations supporting the new frequencies. Meanwhile, TrueMove's slight dip in Download Speed Experience doesn't necessarily signal a drop in capacity. TrueMove offers several tiers of mobile data plans, many of which cap speeds at different levels. Those restrictions are likely limiting average speeds across our user base.

Breaking down our download metrics by technology, we see that 4G Download Speed remains slow in Thailand. Not a single operator averaged 4G download connections faster than 10 Mbps in our analysis. Thailand's sluggish average download speeds should be a matter of some concern. Apart from DTAC, Download Speed Experience and 4G Download Speed are trending downward not upward. At this stage of its development, Thailand's mobile industry is clearly prioritizing 4G accessibility over the connection speed offered to consumers. DTAC's recent gains in speed, however, may spur other operators to follow suit.

Upload Speed Experience

Though TrueMove may have lost its title in Download Speed Experience, it was unquestionably the winner in Upload Speed Experience. Its average overall upload speed of 5.9 Mbps was more than double either of its competitors' scores.

What was particularly impressive about TrueMove's Upload Speed Experience score, however, was that it was only a megabit shy of its Download Speed Experience score. TrueMove is offering nearly symmetrical connections, which is quite shocking given we typically see upload speeds less than half of download speeds, even on the world's most advanced mobile networks. One possibility is that while TrueMove is restricting 4G download speeds on some of its plans, it's likely placing no

limitations on upload speeds, which would create more parity between upstream and downstream connections. Regardless of the reason, faster uploads give TrueMove a significant advantage as mobile user behavior changes. Social media and two-way video apps require a more powerful upstream connection as users are no longer merely consuming content but creating it.

Latency Experience

Our Latency Experience award also went to TrueMove. Its overall network response time of 40.3 milliseconds wasn't just a good score for Thailand, but a respectable rating globally. Many countries with very advanced 4G infrastructures are now pushing Latency Experience scores to the 30ms mark or lower. TrueMove isn't quite there yet, but it's made a lot more progress than its competitors and many other operators in much more mature mobile markets.

Both AIS and DTAC had Latency Experience scores roughly 10ms behind the leader. This metric could prove to be another competitive differentiator for TrueMove as Thai consumers embrace video chat and other real-time social communications apps. Lower latency means less lag in call or chat sessions, thus a better Latency Experience score would produce an improved mobile consumer experience over many of the most popular services on smartphones today.

Regional Analysis

In our regional breakdown, we compared five distinct areas of Thailand, but it wasn't much of a contest. The Central region, which includes metropolitan Bangkok, excelled in every single one of our metrics. Download and Upload Speed Experience was higher, all three of Thailand's operators earned a Fair Video Experience rating, and Latency Experience scores were much improved. In 4G Availability, however, we saw the most impressive numbers in that region. All three operators had 4G Availability scores above 90% in Central Thailand.

The winners of our regional awards largely mirrored our national results. AIS won our 4G Availability award in every area, while TrueMove won all five Upload Speed Experience awards and four of our Latency Experience awards. In Central Thailand, TrueMove was the uncontested leader in our Video Experience award, but in the other four regions DTAC and TrueMove replicated the draw we found in our national results. It was in Download Speed Experience, though, that we found the most competition. DTAC repeated its national win in Central Thailand, but in the other four regions it was deadlocked with TrueMove in Download Speed Experience.

About Opensignal:

Who we are: We are Opensignal, a mobile analytics company. We are the independent global standard for understanding the true state of the world's mobile networks based on measurements of real user experience. Our industry reports are the definitive guide to the true experience consumers receive on wireless networks, and we independently measure this across every major network operator around the globe.

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