



ASIA PACIFIC PAY-TV & BROADBAND MARKETS 2014

Asia Pacific Pay-TV & Broadband Markets 2014 (AP2014), to be published in June 2014, represents Media Partners Asia's (MPA's) 12th annual analysis of Asia's pay-TV and broadband industries. The AP series is widely regarded as the definitive guide to the commercial distribution of video, high-speed data and voice services in 18 markets across Asia Pacific.

Exclusive MPA analysis also incorporates historical indicators and forecasts on media and communications consumption across 18 territories and profiles 70 distribution platforms with operating and financial indicators. The AP series is established as the only authoritative reference of its kind, based on MPA's independent analysis of information provided by operators, broadcasters, investor groups, technology suppliers, regulatory agencies and media buyers.

AP 2014 offers plenty of compelling features including:

Buyers of the report receive complimentary access to: (1) Excel models included in the report; (2) Q&A and guidance with MPA analysts. Additional buy through access at competitive prices to relevant bundled MPA analysis including: (1) Bottom-up operator forecasts for each of the key territories; (2) The MPA Channel database: CPS / flat fee, tiering, subscriber penetration, MGs, local ad sales and affiliate fees for more than 100 pay channels and networks across Asia; and (3) The MPA Operator database: Updated quarterly TV and broadband subs and penetration by tier, ARPU and more.

Analysis of new competitors and disruptors. New entrants and technologies are shaking up video distribution; MPA evaluates the key platforms, taking in OTT, DTT and free DTH and the impact across Asian markets.

Multiscreen and TVE. For the first time, MPA quantifies and forecasts the market for multiscreen and TV Everywhere services with projections of future value, if any

Linear growth. Certain Asian markets are saturating rapidly and demand for certain genres and services are bottoming out. MPA evaluates renewal and growth options for the core pay-TV business model in these markets

Affordability analysis. The MPA Pay-TV Index with analysis of affordability for pay-TV amongst various demographics and the impact on tiering and packaging.

MPA proprietary analysis of market fundamentals. Analysis and detailed operating models for 18 markets, tracking and forecasting pay-TV, broadband and telephony adoption; ARPU and consumer spend; subscription fees by basic and premium tiers, service and platform; local and regional advertising; end-user subscription revenues; platform content spends; affiliate fees for broadcasters; distribution platform capEx.

Next-generation TV and communications. Detailed quantitative and qualitative analysis of how DTV and broadband systems are retooling platforms in the next-generation universe with data and details on trends in DVR, HDTV TVE, and VOD adoption/penetration, revenues and profitability; DOCSIS 3.0 and fiber broadband deployment, adoption and pricing; and the future winners and losers in over-the-top video services.

Policy scenarios. Appraisal of key changes in the Asian pay-TV and broadband regulatory roadmap and their impact.

Investment criteria and financial analysis. We highlight how operators are investing in capital expenditure in key markets and which investors are funding operators; key strategic and PE capital positions across platforms and full financial metric analysis (incl. P&L) of key distribution platforms, broadcasters and content providers plus expanded analysis of public and private market valuations for the industry.

League tables. MPA's end-of-the year league tables for M&A, public market TV, pay-TV and broadband currencies and the leading platforms and broadcasters/content providers across 16 markets, and regionally by subscribers, revenues and profits



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SECTORS

- » Cable & Broadband
- » DTH Satellite TV
- » IPTV
- » Fixed & Mobile Broadband
- » Broadcasting & Content
- » Digital & Interactive TV
- » Fixed Service Satellite
- » Finance & Investment
- » Regulation

PROFILED MARKETS

- » Australia
- » Cambodia
- » China
- » Hong Kong
- » India
- » Indonesia
- » Japan
- » Korea
- » Malaysia
- » Myanmar
- » New Zealand
- » Pakistan
- » Philippines
- » Singapore
- » Sri Lanka
- » Taiwan
- » Thailand
- » Vietnam

PROFILED SEGMENTS

- » Macroeconomics
- » Television Household Universe
- » Addressable Market for Pay-TV
- » Subscribers, ARPUs and economics/consumption for:
 - Analog Pay-TV
 - Broadband ADSL, ADSL2+, VDSL
 - Broadband Cable
 - Broadband FTTx
 - Cable TV
 - Digital Pay-TV
 - DTH Satellite TV
 - DVR
 - IPTV
 - HDTV
 - Pay-per-view (PPV)
 - Telephony
 - TV Everywhere (TVE)
 - VOD
 - Wireless Broadband
- » Pay-TV Subscription
- » Pay-TV Advertising
 - Local
 - Pan Regional
- » Industry Revenues by Platform
- » Pay-TV & Broadband Operator Economics
 - Metrics by market for subs, ARPU, Sales & EBITDA
 - Rankings
- » Channel / Broadcast Economics
 - Ad Sales
 - Rankings by profit and sales Subscription & other fees
- » Online Video Economics
- » Financial Valuations: Operators & Broadcasters
- » Investment: M&A, IPOs, Equity & Debt
- » Regulatory Index



ASIA PACIFIC PAY-TV & BROADBAND MARKETS 2014

PROFILED OPERATORS (CABLE, DTH, IPTV, MOBILE TV)

- » Aora TV
- » Asianet Satellite Communications
- » Astro Malaysia Holdings
- » Beijing Gehua Cable TV Network
- » Bharti Telemedia
- » Cable & Multimedia (C&M) Communications
- » China Cable Network
- » China Network Systems
- » China Telecom
- » Chunghwa Telecom Co., Ltd
- » CJ HelloVision (CJHV)
- » CTH
- » DD Freedish
- » DEN Networks Limited (DEN)
- » Dialog Axiata
- » Digicable Network (India) Private Limited
- » Dish TV India
- » Fetch TV
- » Foxtel
- » Globe Telecom Inc.
- » GMM Z
- » Grant Investrade Limited (GIL)
- » Hathway Cable & Datacom (Hathway)
- » Ho Chi Minh City Television Choice Centre (TMS)
- » Hong Kong Broadband Network
- » Hyundai Communications Network (HCN)
- » i-Cable Communications
- » Indonesia Media Televisi (IMTV)
- » IndusInd Media & Communications (InCable)
- » J:COM
- » K Vision
- » Kbro Co., Ltd
- » KDDI
- » KT Corp. (KT)
- » KT SkyLife (KTS)
- » LG Uplus
- » Linknet
- » MediaQuest Holdings Inc.
- » Mega Media Indonesia
- » MNC Sky Vision
- » NexMedia
- » Nippon Telegraph and Telephone Corp. (NTT)
- » Oriental Cable TV Network
- » Ortel Communications
- » Pakistan Telecommunication Co. Ltd
- » PCCW
- » Philippine Long Distance Telephone Co. (PLDT)
- » Reliance Digital TV
- » Saigontourist Cable Television Company (SCTV)
- » Shenzhen Topway
- » Singapore Telecommunications
- » Siti Cable Network (Siti Cable)
- » SK Broadband (SKB)
- » Sky Network Television (Sky TV)
- » Sky Perfect JSAT
- » SkyCable Corp.
- » Sri Lanka Telecom (SLT)
- » StarHub
- » Sun Direct TV (P) Ltd
- » Taiwan Broadband Communications
- » Taiwan Mobile
- » Tata Sky
- » Tbbroad
- » Telekom Malaysia
- » Telkom Indonesia
- » Trans Vision
- » True Corp.
- » TVB Network Vision (TVBNV)
- » Videocon D2h
- » VSTV (K+)
- » VTV Cable (VTV Cab)
- » Wasu Media
- » WorldCall Telecom Ltd
- » You Broadband India Private Limited