

ASIA PACIFIC

ONLINE VIDEO & BROADBAND DISTRIBUTION

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Asia Pacific Video & Broadband Distribution 2017

This authoritative report provides detailed analysis of:

- » Market landscape, infrastructure, content dynamics and online video in 14 markets with an appraisal of key trends & competitive dynamics
- » Detailed market models from 2014-22 across telecoms, broadband, SVOD and AVOD
- » Historical, current and projected subscribers, revenues and expenditure across online video
- » Historical, current and projected subscribers, revenues and expenditure across mobile & fixed broadband
- » Consumer spend and direct subscribers across SVOD
- » Wholesale online video revenue and indirect customers from telecom video partnerships
- » Digital media advertising, online video advertising – YouTube / Facebook share versus local / regional platforms
- » More than 100 key local, regional and global OTT platforms
- » More than 60 key local broadband companies, including mobile, fixed and pay-TV networks
- » Detailed analysis of telecom and pay-TV operator packaging for online video & broadband

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Methodology & Definitions

Media Partners Asia (MPA) analysis and forecasts are based on several factors, including:

- » Surveys and interviews with the main online video, pay-TV and telecoms operators in 14 Asia-Pacific markets.
- » Relevant company filings, financial results and presentations.
- » Interviews with other key groups in the industry value chain. These include: (1) Broadcasters, content providers, production houses and studios; (2) Advertising agencies and media buyers; (3) Relevant technology suppliers.
- » Proprietary databases managed by MPA, collating historical information including analysis of macroeconomic data as well as video and broadband distribution platforms.
- » Our models for online video and broadband distribution track and project subscribers and revenues from a bottom-up approach with analysis of major individual platforms that, in aggregate, account for 50-80% market share across any single segment.

Key terms and definitions include:

- » **Broadband subscriptions** include: (1) Fixed broadband, which covers cable modem, ethernet LAN, retail ADSL, VDSL and FTTx, (fiber-to-the home, fiber-to-the building and fiber-to-the-curb) technologies; (2) Mobile broadband, which includes 3G, 3.5G/HSDPA, WiMax or its equivalent, 4G and LTE (Long Term Evolution) networks. Fixed broadband connections are typically defined as having download speeds of 256 Kbps or more.
- » **Online Video** is defined as a video service delivered over an open internet or broadband connection. We exclude revenues from illegal services in our estimates and forecasts.
- » **Advertising Video On Demand (AVOD)** services are supported by advertising, within or around online video streams, or on a website or app.
- » **Subscription Video On Demand (SVOD)** services are supported by consumer subscription payments, either as a standalone offering or as part of a bundle with an existing pay-TV and/or broadband service.
- » **Legacy fixed broadband subs** refer to subscriptions on ADSL and first generation cable Docsis platforms.
- » **Next-generation broadband subs** refer to subscriptions on cable Docsis 3.0 and FTTx networks.
- » **Direct SVOD subs** refer to subscriptions where services are accessed directly by a customer.
- » **Indirect SVOD subs** refer to subscriptions where services are delivered through a telco and/or pay-TV bundle.
- » **Online video advertising revenue** is net, calculated after discounts and includes global, regional and local platforms.
- » **Online video advertising revenue (excluding global platforms)** is a subset of online video advertising revenue and excludes revenue from global platforms such as YouTube and Facebook.
- » **Average Revenue Per User (ARPU)** is the monthly subscription revenue per user generated by a platform, based on an average subscriber number for the month. Direct SVOD ARPUs reflect average blended direct consumer spend on SVOD services. Indirect SVOD ARPUs are based on wholesale fees paid out by telecom operators to platforms.