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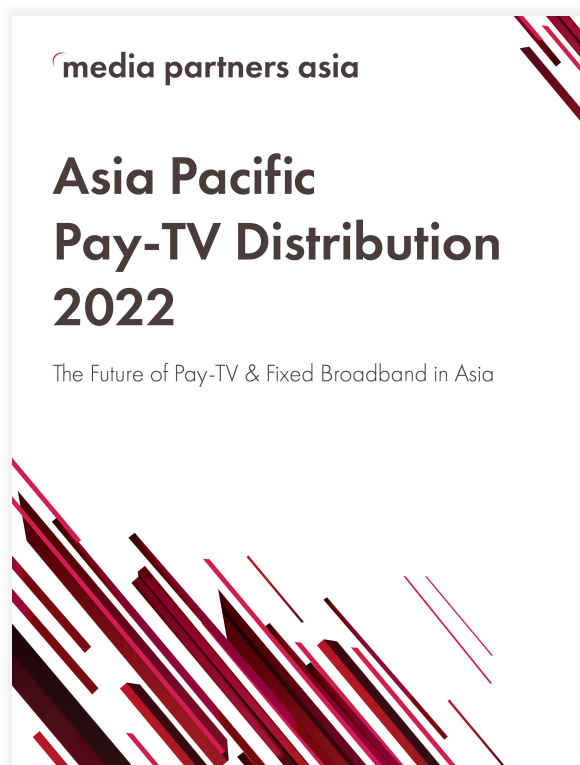
media partners asia

# Asia Pacific Pay-TV Distribution 2022

The Future of Pay-TV & Fixed Broadband in Asia

# ASIA PACIFIC PAY-TV DISTRIBUTION 2022

Definitive report with detailed analysis, data and forecasts tracking pay-TV & fixed broadband in 16 key markets



## HIGHLIGHTS

- Asia Pacific's pay-TV industry will generate over US\$57 bil. in revenue in 2022 and is projected by Media Partners Asia (MPA) to grow at 2% CAGR to ~US\$64 bil. by 2027.
- Pay-TV's sustainability is anchored to bundled IPTV and home broadband services with telcos, while pay-TV operators also integrate premium online SVOD services through the launch of Android platforms, new STBs and various packages.
- Pay-TV operators continue to invest in premium sports and local entertainment whilst using these rights and IP to drive the launch and growth of online video platforms.
- India, Korea and Japan will remain the largest pay-TV revenue generating markets in Asia Pacific ex China, accounting for a combined 74% share in 2022, growing to 78% by 2027.
- Australia, Malaysia and the Philippines will remain important, contributing 7% by 2027 though both Australia and Malaysia will see cord cutting and face significant structural challenges.

## KEY METRICS (Historical data & projections with MPA proprietary analysis (Full data provided in Excel format))

- Pay-TV Subscribers across Cable, DTH & IPTV
- Pay-TV ARPU & Subscription Revenues
- Pay-TV Advertising Revenues
- Pay-TV Operator Content Costs & Investments
- Pay-TV Channel Affiliate Fees
- Fixed Broadband Subs by Technology, ARPU & Revenues
- Cable, ADSL & FTTx Platforms
- KPIs across 60 Pay-TV & Broadband Operators
- Pay-TV Operator P&L
- Pay-TV Operator Packaging & Pricing

# REPORT COVERAGE – DECODING PAY-TV IN ASIA PACIFIC

## 16 MARKETS



Australia



China



Hong Kong



India



Indonesia



Japan



Korea



Malaysia



New Zealand



Pakistan



Philippines



Singapore



Sri Lanka



Taiwan



Thailand



Vietnam

## 60+ PAY-TV PLATFORMS



And many more...

# PAY-TV, FIXED BROADBAND UNIVERSE & COVERAGE

## PAY-TV PLATFORMS

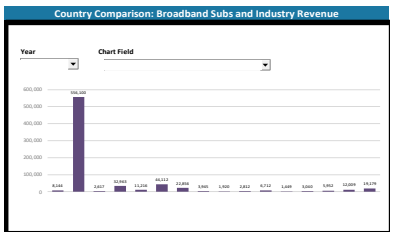
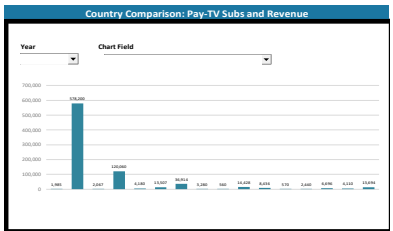
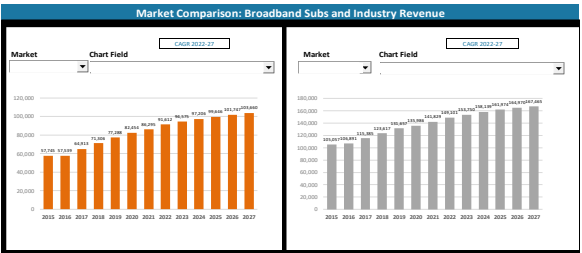
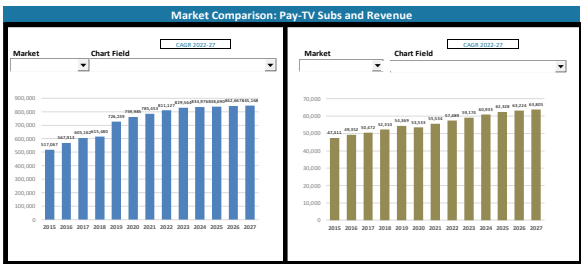
AIS	Link Net	Viettel Telecom
Astro Malaysia	MNC Vision	Vodafone
Beijing Gehua	MNC Vision Networks	VSTV (K+)
BesTV	MyTV	VTV Cable
Bharti Telemedia (Airtel Digital TV)	Nippon Telegraph and Telephone Corp. (NTT)	Wasu Media
Canal+	Oriental Cable	WorldCall Telecom
China Cable Network	PCCW (NowTV)	
China Network Systems (CNS)	SCTV	
Chunghwa	Shanghai Oriental Pearl Media (BesTV)	
Cignal TV	Shenzhen Topway	
D'Live	Singtel	
Den Networks	Siti Cable Network (Siti Cable)	
Dialog TV	SK Telecom	
Dish TV	Sky Network TV	
FetchTV	Sky Perfect JSAT	
Foxtel	SkyCable	
FPT Telecom	Sri Lanka Telecom (Peo TV)	
GTPL Hathway	Starhub	
Hathway Cable & Datacom	Sun Direct TV (P) Ltd	
HCN	Taiwan Broadband Communications (TBC)	
i-Cable	Taiwan Mobile	
IndiHome	Tata Sky	
IndusInd Media & Communications	Tbroad	
J:COM	Telkom Indonesia	
Kbro	Telekom Malaysia	
KT	Transvision	
KT SkyLife	True Corp	
LG HelloVision		
LG U+		

## FIXED BROADBAND COMPANIES

AIS	Nippon Telegraph and Telephone Corp. (NTT)
Beijing Gehua	Oriental Cable
China Cable Network	PCCW (HKT)
China Mobile	PLDT
China Network Systems (CNS)	PTCL
China Telecom	SCTV
China Unicom	Shenzhen Topway
Chunghwa	Singtel
Converge ICT	Siti Networks
D'Live	SK Telecom
Den Networks	SkyCable
Foxtel	Spark
FPT Telecom	Sri Lanka Telecom
Globe Telecom	Starhub
GTPL Hathway	Taiwan Broadband Communications (TBC)
Hathway Cable & Datacom	Taiwan Mobile
HCN	Tbroad
Hong Kong Broadband Network (HKBN)	Telkom Indonesia
i-Cable	Telekom Malaysia
IndiHome	True Corp.
IndusInd Media & Communications	Vietnam Posts and Telecommunications Group (VNPT)
J:COM	Viettel Telecom
Jasmine	Vodafone New Zealand
Kbro	VTV Cable
KT	Wasu Media
LG HelloVision	WorldCall Telecom
LG U+	You Broadband India Private Limited
Link Net	
MNC Vision Networks	

# TRACKING PAY-TV AND FIXED BROADBAND INDUSTRY AND MARKET KPIS

## DASHBOARDS



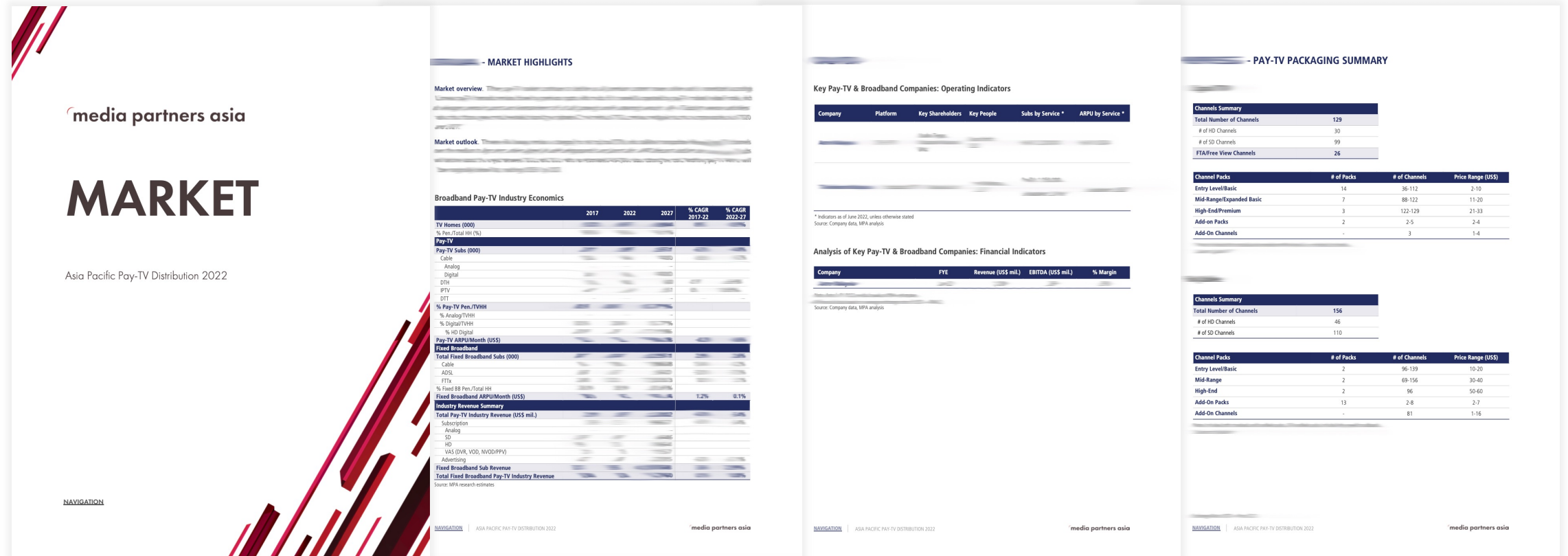
## DETAILED PAY-TV & FIXED BROADBAND MARKET MODELS

Y/E Dec.		2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Cable TV Subs	(000)												
Analog	(000)												
Digital	(000)												
SD	(000)												
HD [Note: HD is a subset of SD]	(000)												
% Change	(%)												
% Cable TV Pen./TVHH	(%)												
Analog	(%)												
Digital	(%)												
Net New Cable TV Subs	(000)												
Analog	(000)												
Digital	(000)												
% Analog Pen./Cable TV Subs	(%)												
% Digital Pen./Cable TV Subs	(%)												
Addressable VOD Cable Homes	(000)												
As a % of Digital Subs	(%)												
Monthly Unit Buy Rate													
Total VOD Units	(000)												
DVR Cable Subs	(000)												
As a % of Digital Cable Subs	(%)												
Average Cable TV Subs	(000)												
Analog	(000)												
Digital	(000)												
SD	(000)												
HD	(000)												


# COUNTRY PROFILE


## ANALYSIS BY COUNTRY

## PAY-TV PACKAGING SUMMARY



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## ABOUT US



Media Partners Asia (MPA), established in 2001, is a leading independent provider of advisory, consulting and research services, focusing on media and telecoms in Asia Pacific and the Middle East. MPA also operates AMPD, launched in 2019. AMPD measures digital activity in 13 global markets using proprietary software, focused on video, content, advertising and connectivity sectors with detailed consumer and content insights. MPA has been involved in due diligence for M&A activity in APAC with numerous local and cross border transactions while also operating as an IC (Independent Consultant) in the IPOs of media and telecoms companies. MPA hosts and operates APOS, the leading annual summit for Asia's TMT industry with global impact.

To find out more about Asia Pacific Pay-TV Distribution 2022 or to buy the report please contact:

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