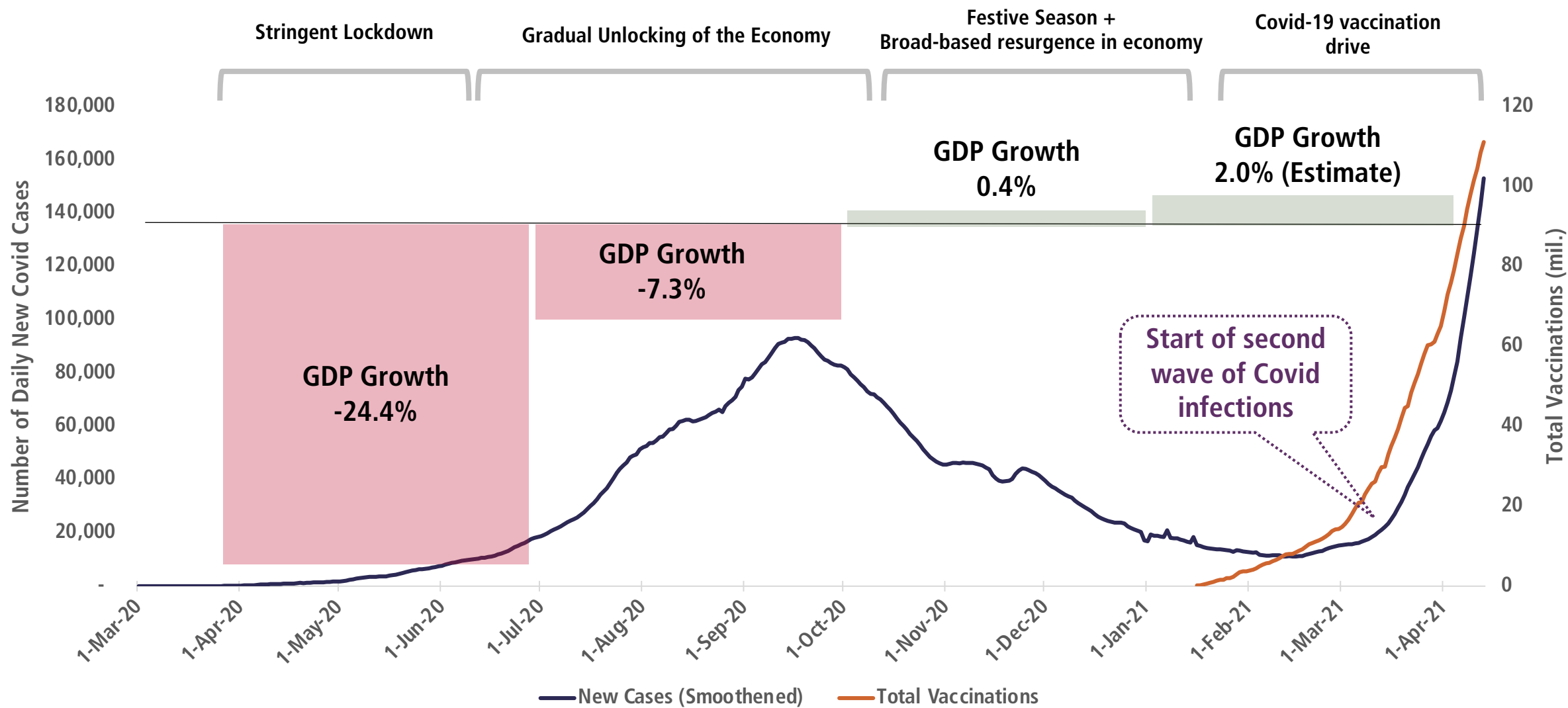


KEY TRENDS IN INDIA'S ONLINE VIDEO INDUSTRY

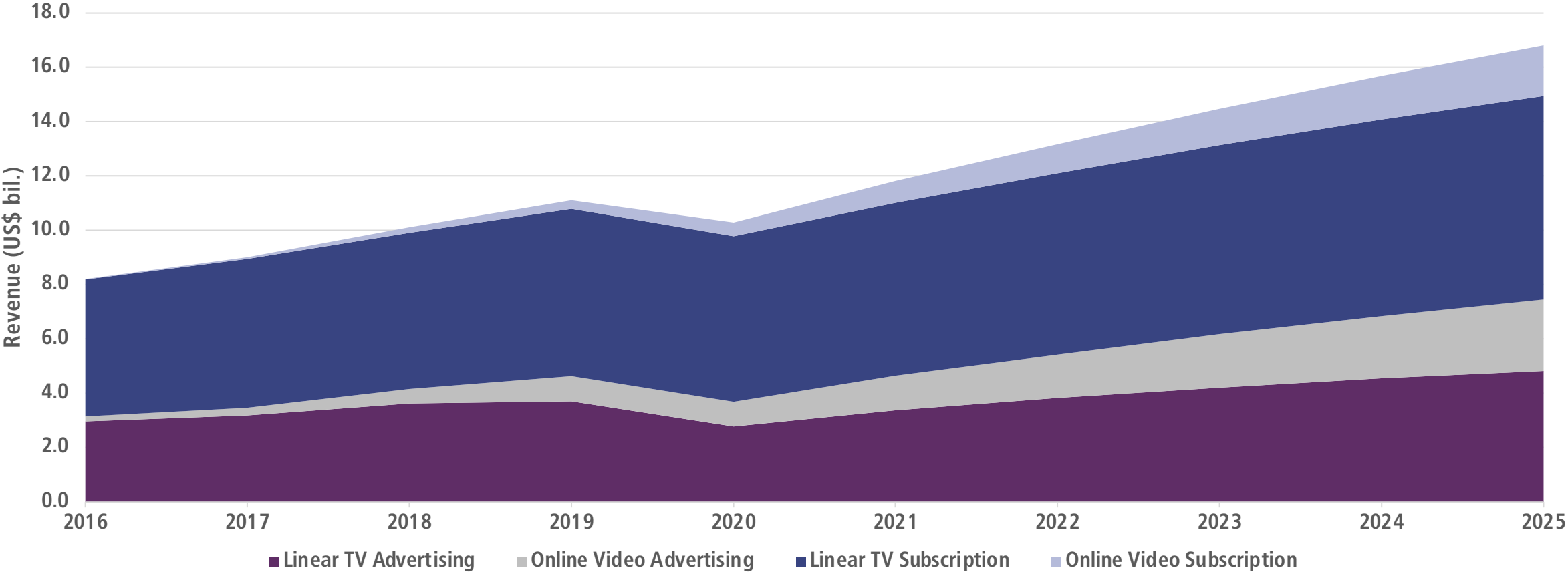
April 2021

ECONOMIC RECOVERY COMING OUT OF THE COVID



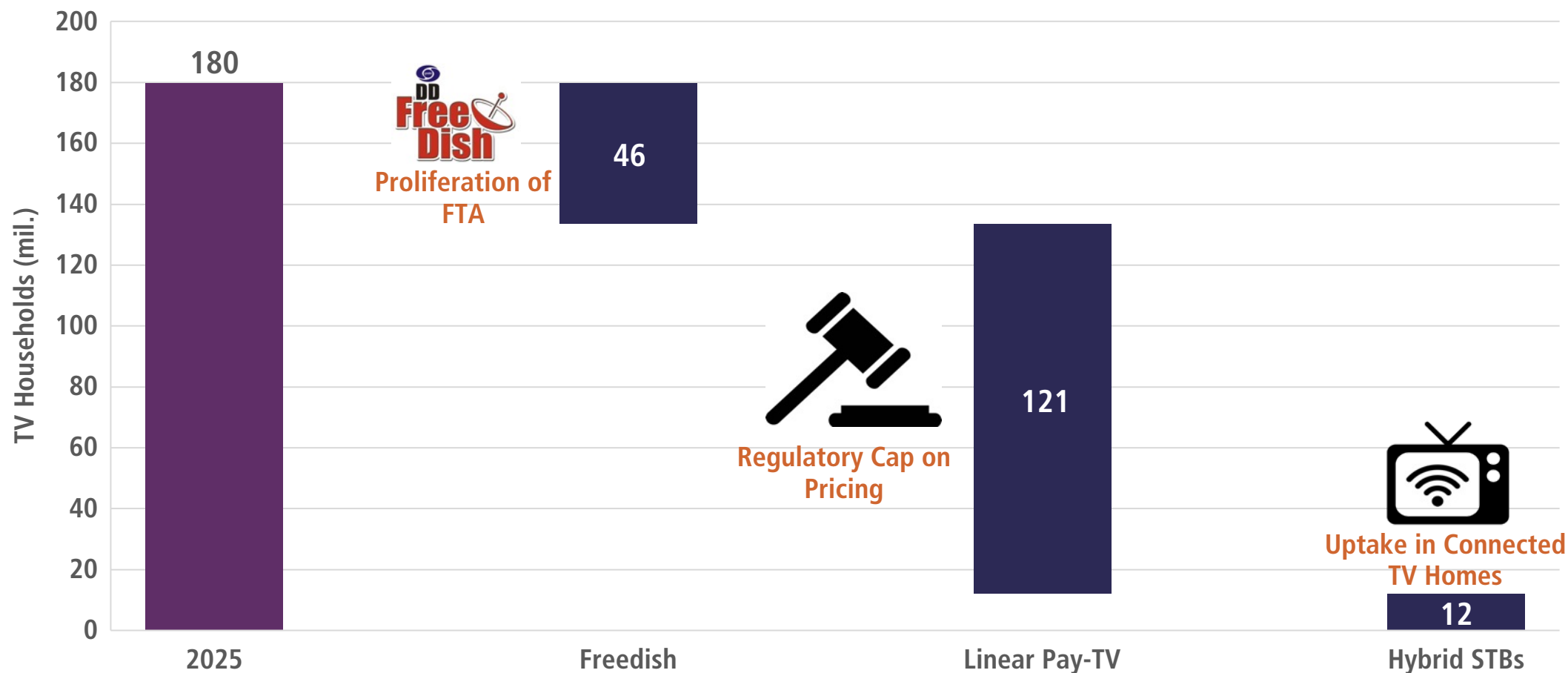
TRADITIONAL TV SCALE, ONLINE VIDEO RISING

VIDEO MARKET WILL GROW AT A CAGR OF 10% BETWEEN 2020-25 TO US\$17 BIL.



STRUCTURAL AND REGULATORY DEVELOPMENTS COULD LIMIT PAY-TV POTENTIAL

FTA AND TARIFF CAPS KEEP REVENUES SKEWED TO ADVERTISING, RESTRICT PROGRAMMING BUDGETS



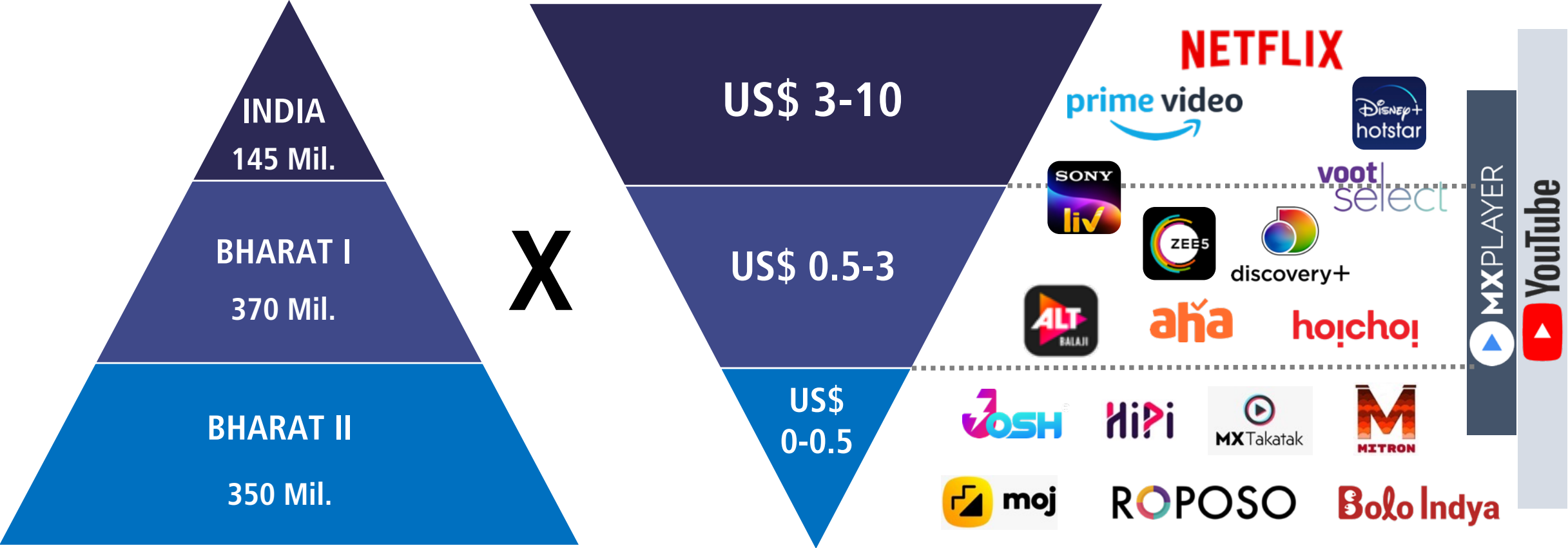
RACE TO WIN AUDIENCES IN BHARAT

DEARTH OF PROFESSIONAL CONTENT CATERING TO RURAL INDIA

USERS (2025)

PROPENSITY TO PAY

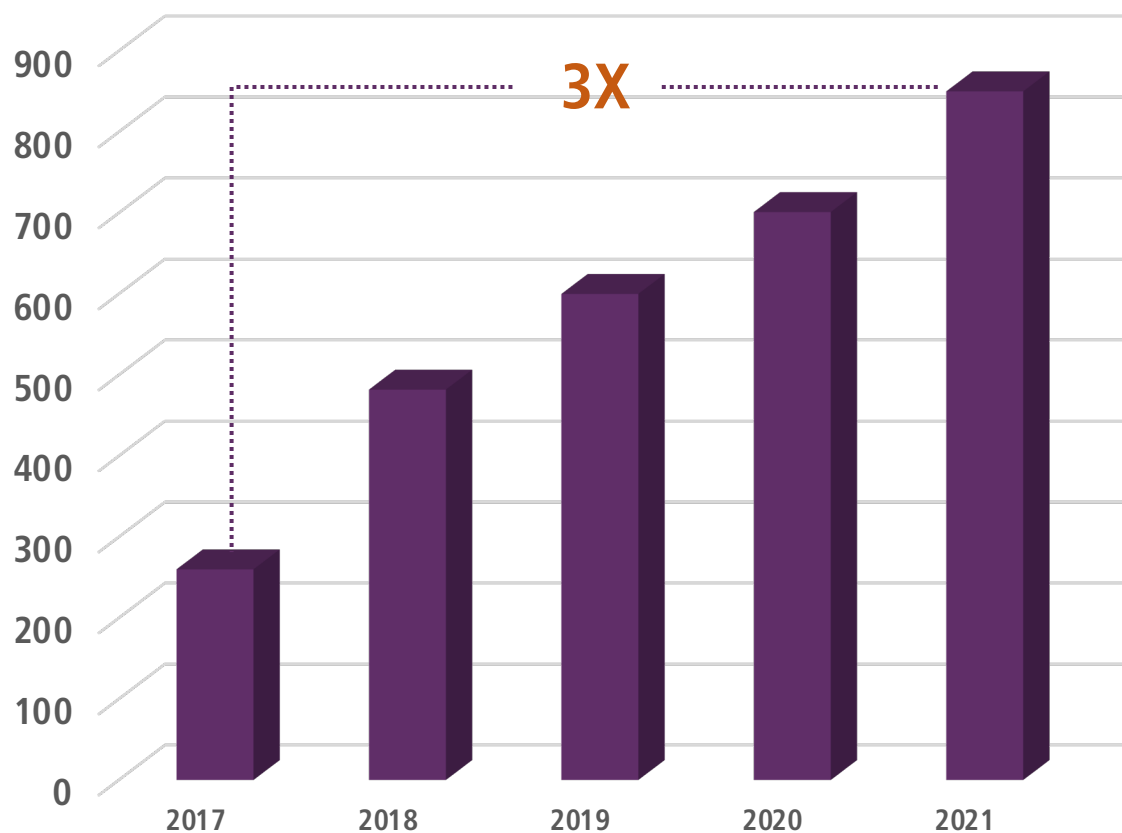
PLATFORM PREFERENCE



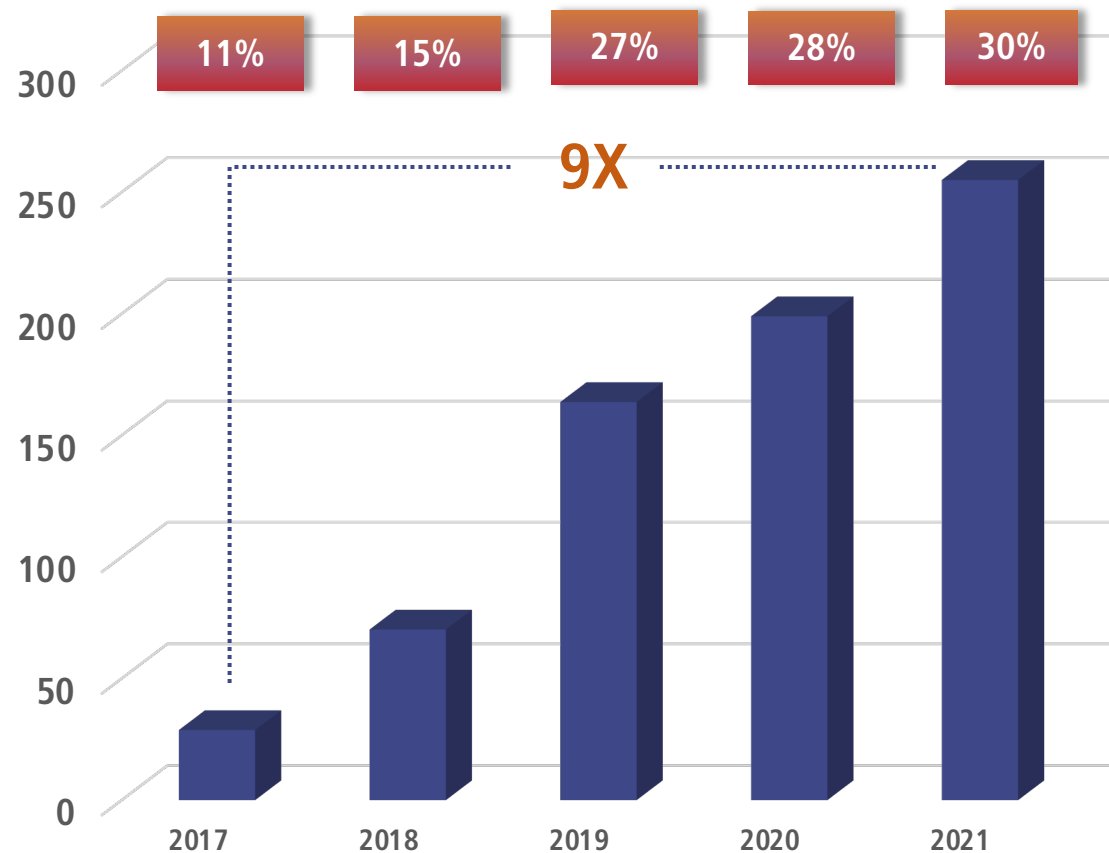
Source: Media Partners Asia

UPTICK IN CONTENT INVESTMENTS WITH PUSH ON LOCAL ORIGINALS

ONLINE VIDEO CONTENT INVESTMENT



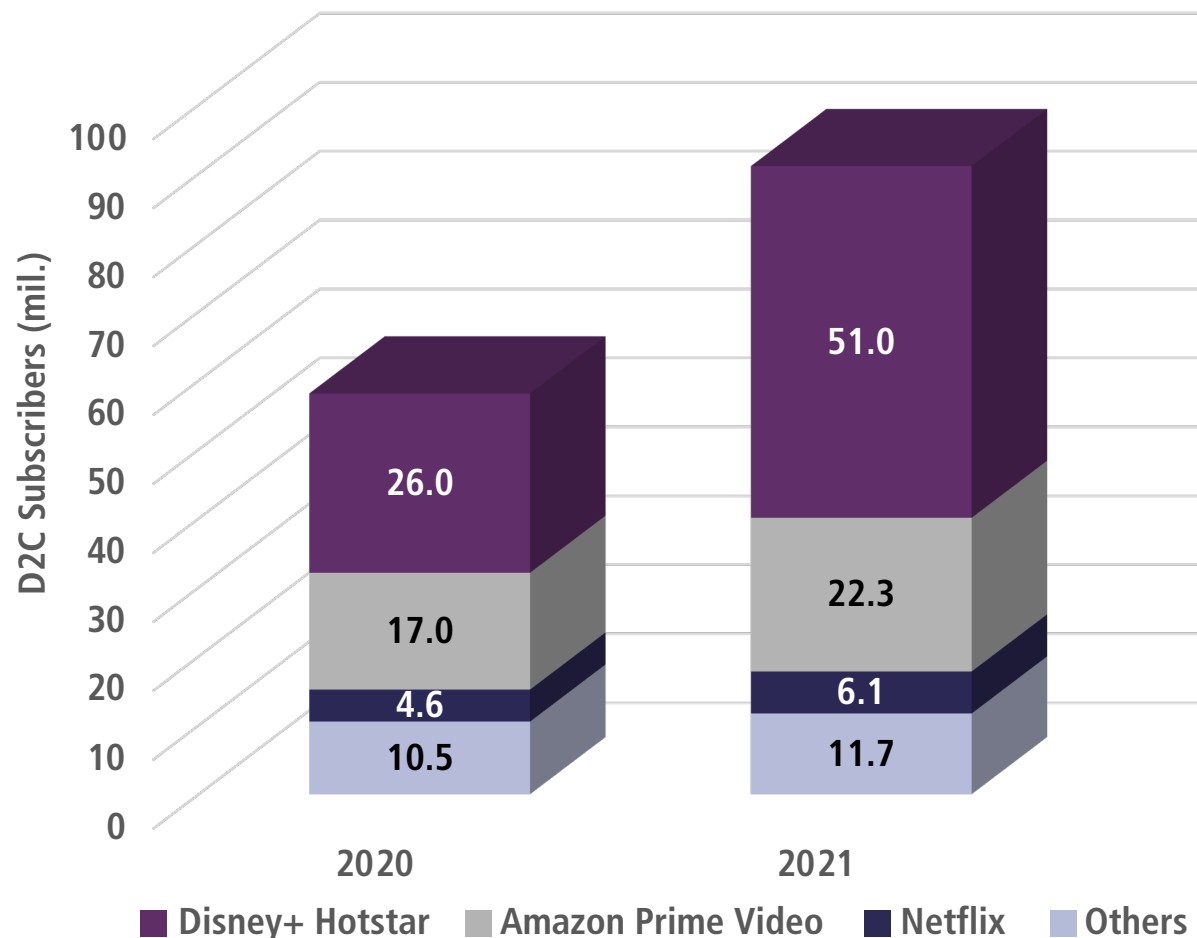
INVESTMENT IN ORIGINALS



Originals Share of Total Investments

DISNEY, NETFLIX AND APV CONTINUE TO DOMINATE INDIA'S SVOD MARKET

TOP THREE PLATFORMS TO GARNER 80 MIL. SUBSCRIPTIONS IN 2021



Source: Media Partners Asia

DISNEY+ HOTSTAR



Indian Premier League



International Cricket



India Cricket

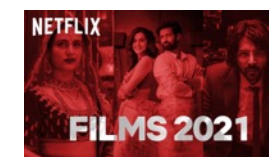
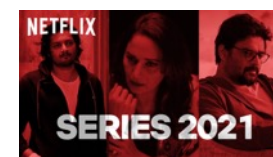
Sports Heavy Calendar

AMAZON PRIME VIDEO



Regional Content Push

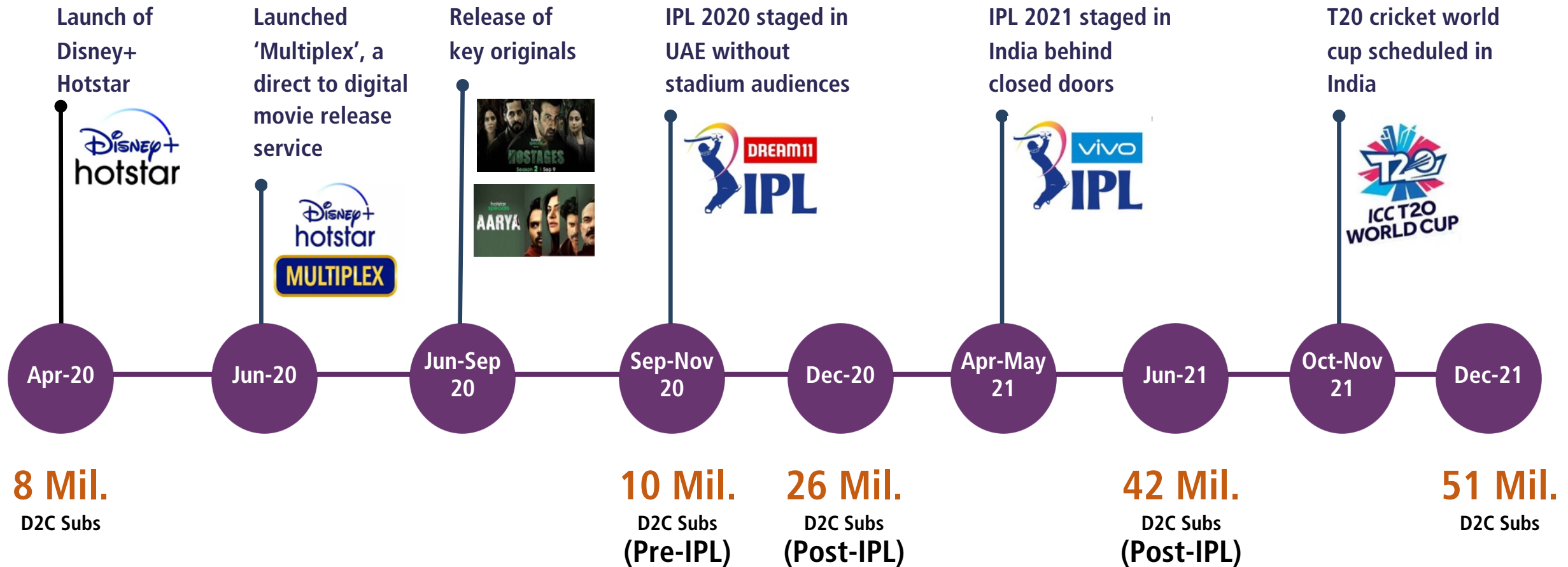
NETFLIX



41 Original Releases in 2021

DISNEY+ HOTSTAR: MULTIFOLD GROWTH IN DIRECT SUBSCRIPTIONS

CRICKET HEAVY CALENDAR TO BUILD SCALE IN 2021



ABOUT US



Established in 2001, Media Partners Asia (MPA) is the leading independent provider of research, advisory and consulting services across the media and telecoms sectors in Asia Pacific.

MPA provides definitive reports with proprietary industry models and forecasts. Our reports are widely used and sourced by local, regional and global companies for business planning, market strategy and capital market transactions.

MPA advisory and consulting services help clients enter new markets and acquire businesses with our team providing commercial due diligence, customized research and strategy recommendations.

We offer customized services to guide strategic planning and business development activities and support the launch of new products and services. We also provide independent consultant (IC) industry analysis and benchmarking for equity and debt offerings, including IPOs for broadcasting, digital media and telecommunications companies in Asia Pacific.

Our offering includes AMPD, a research platform measuring consumer behavior across the digital economy, including online video and gaming. The service provides unparalleled access to data, case studies and strategies for business planning, marketing, and programming.

CONTACT: Mihir Shah, Vice President, India| mihir@media-partners-asia.com