

media partners asia

*Asia Pacific*  
**Video & Broadband**  
**Industry 2025**

Definitive report with detailed analysis, data and forecasts  
tracking TV, online video & fixed broadband in 14 key markets

# Asia Pacific Video & Broadband Industry 2025

Definitive report with detailed analysis, data and forecasts tracking TV, online video & fixed broadband in 14 key markets



## HIGHLIGHTS

- The transition from television to online video is gaining speed across Asia. Over the next five years, online video revenues in the region will grow from US\$64 billion in 2024 to US\$89 billion by 2029. Traditional TV revenue, meanwhile, will contract by US\$8 billion over the same period.
- China leads monetization, followed by Japan, India, Korea, Australia, Indonesia and Thailand.
- Active connected TV penetration is growing rapidly, boosting big screen engagement and monetization for YouTube and the premium VOD category, including subscription-video-on-demand and freemium platforms.
- MPA projects fixed broadband subscribers to grow at 4.2% CAGR over 2024-29, rising from 193 mil. to 237 mil., driven by fibre deployments, with penetration growing to 50% and 70% in Thailand and Malaysia respectively by 2029, while Australia, Japan, Korea and Singapore will continue to lead at 90-100%.
- SVOD subscriptions substantially reaccelerated in 2024, adding net new adds of 32.2 mil. and 26.7 mil. in APAC and APAC-ex China, respectively. New low-cost ad tiers, the growth of sports across SVOD and new marketplaces for premium local and global content, will drive future growth.
- Cord-cutting has accelerated in most markets as sports and entertainment content has shifted online and cracks have started to emerge in the hard bundles. The pay-TV universe ex-China will contract from 188 mil. in 2024 to 161 mil. by 2029, with India and Korea accounting for ~70% of the total.

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

- **Video Industry Revenue (Free TV, Pay-TV, SVOD, UGC AVOD, Premium AVOD)**
- **Video Consumer Spend (Pay-TV, SVOD)**
- **Revenue by leading TV Broadcasters**
- **Subscribers by leading Pay-TV Operators**
- **Mobile Subs by Technology & Operators**
- **Fixed Broadband Subs by Technology & Operators**
- **Online Video Industry Revenue (SVOD, UGC AVOD, Premium AVOD)**
- **Revenue by leading Video Platforms**
- **Revenue by leading Premium VOD platforms**
- **Subscribers & ARPUs by leading VOD Platforms**
- **Online Video Pricing, Packaging & Partnerships**
- **Pay-TV Operators Packaging**

# Report Coverage – Decoding Video Industry In Asia Pacific

## 14 MARKETS



Australia



China



Hong Kong



India



Indonesia



Japan



Korea



Malaysia



New Zealand



Philippines



Singapore



Taiwan



Thailand



Vietnam

## KEY VIDEO PLATFORMS



And many more...

# KPIs For MAJOR TV, ONLINE VIDEO & BROADBAND OPERATORS

## BROADCASTERS

### Australia

Nine Entertainment  
Seven West Media

### China

CCTV  
Shanghai Media Group  
Hunan TV Broadcasting

### Hong Kong

TVB  
ViuTV/PCCW Media  
HOY TV

### India

Disney Star  
TV18

### Malaysia

Zee  
Sony  
Sun Network

### Indonesia

SCMA  
MNC  
Visi Media Asia (Viva)

### Japan

Nippon TV  
TV Asahi  
Tokyo Broadcasting System

### Korea

KBS  
SBS  
MBC

### Malaysia

One Enterprise  
Media Prima

### New Zealand

TVNZ

### Philippines

GMA Network  
ABS-CBN  
TV5

### Singapore

MediaCorp  
Taiwan  
Formosa TV

Taiwan TV  
China TV

### Thailand

BEC World  
One Enterprise  
Workpoint

## ONLINE VIDEO

### Regional

YouTube  
Meta Video  
TikTok  
Netflix  
Amazon Prime Video  
Disney+  
Viu  
WeTV  
iQIYI  
MAX  
Australia  
Paramount+  
Stan  
Binge  
Kayo

### China

Tencent Video  
Douyin  
Kuaishou  
Youku  
Mango TV  
Bilibili

### Hong Kong

MyTV Super  
Now E  
HMVOD

### India

Jio Cinema  
SonyLIV  
Zee5

### Indonesia

Vidio  
MNC Video

### Japan

U-Next  
Abema  
Hulu Japan  
DAZN

### Korea

TVING  
Wavve  
Coupang Play

### Malaysia

Astro Go  
Sooka

### New Zealand

Sky Sport Now  
Neon

### Philippines

iWantTFC  
VMX

### Singapore

StarHub TV/Premier+  
meWatch

### Taiwan

FriDay  
MyVideo  
Hami Video

### Thailand

TrueID  
AIS Play  
Monomax  
Vietnam

### Vietnam

VieOn  
FPT Play  
TV360

## PAY-TV

### Australia

Foxtel  
Fetch TV

### China

China Mobile  
China Telecom  
China Unicom

### Hong Kong

Now TV

### India

Tata Play  
Airtel  
Dish TV  
Sun Direct

### Indonesia

IndiHome  
LinkNet  
MNC Vision

### Japan

J:COM  
Sky Perfect JSAT  
NTT Hikari TV

### Korea

KT Genie TV  
B TV  
LG U+

LG HelloVision

KT SkyLife

### Malaysia

Astro  
Telekom Malaysia

### New Zealand

Sky NZ

### Philippines

Cignal  
Gsat

### Singapore

StarHub  
Singtel

### Taiwan

Chunghwa MOD  
CNS  
Kbro

TBC

### Thailand

TrueVisions  
AIS Play Box  
3BB Giga TV

### Vietnam

SCTV  
FPT  
MyTV  
Viettel  
VTV Cable

## FIXED BROADBAND

### Australia

Telstra  
TPG Group  
Optus  
China  
China Mobile  
China Telecom  
China Unicom  
China Broadcast Network

### Hong Kong

HKT/PCCW  
HKBN  
HGC Broadband  
i-Cable

### India

Jio  
Airtel  
BSNL

### Indonesia

IndiHome  
XL Axiata  
IOH  
MyRepublic

### Japan

NTT  
Softbank  
KDDI  
J:COM

### Korea

Korea Telecom  
SK Telecom  
LG U+  
Malaysia  
TM  
Maxis  
CelcomDigi

### New Zealand

Spark NZ  
One NZ  
2degrees  
Philippines  
PLDT  
Converge  
Globe

### Singapore

StarHub  
Singtel  
M1

### Taiwan

Chunghwa  
Kbro  
CNS  
TBC

### Thailand

AIS  
True  
Vietnam  
Viettel  
VNPT  
FPT

*Note: KPIs for YouTube, Netflix, Amazon Prime Video and Disney+ available in all relevant markets*

# Database & Country Models

## Regional Summary

### Video Industry Revenue (US\$ mil.)

| Country                    | 2019           | 2020           | 2021           | 2022           | 2023           | 2024           | 2025           | 2026           | 2027           | 2028           | 2029           |
|----------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Australia                  | 6,993          | 7,017          | 8,234          | 8,811          | 9,102          | 9,555          | 10,055         | 10,562         | 10,921         | 11,170         | 11,353         |
| China                      | 57,444         | 56,710         | 60,247         | 60,906         | 64,325         | 66,549         | 67,003         | 68,012         | 68,939         | 69,538         | 70,313         |
| Hong Kong                  | 1,049          | 838            | 1,847          | 1,105          | 1,103          | 1,112          | 1,145          | 1,344          | 1,190          | 1,203          | 1,216          |
| India                      | 9,412          | 8,896          | 10,334         | 11,349         | 11,792         | 11,662         | 12,441         | 13,343         | 14,450         | 15,203         | 15,931         |
| Indonesia                  | 2,128          | 2,076          | 2,434          | 2,559          | 2,534          | 2,617          | 2,772          | 2,953          | 3,112          | 3,257          | 3,386          |
| Japan                      | 26,356         | 25,226         | 28,573         | 29,342         | 29,712         | 29,981         | 30,619         | 31,273         | 31,745         | 32,168         | 32,475         |
| Korea                      | 8,181          | 8,705          | 10,305         | 11,106         | 10,917         | 11,487         | 11,881         | 12,314         | 12,613         | 12,812         | 12,976         |
| Malaysia                   | 1,370          | 1,264          | 1,313          | 1,351          | 1,359          | 1,374          | 1,416          | 1,463          | 1,501          | 1,535          |                |
| New Zealand                | 1,093          | 1,147          | 1,287          | 1,338          | 1,339          | 1,359          | 1,384          | 1,407          | 1,420          | 1,427          | 1,426          |
| Philippines                | 1,398          | 1,219          | 1,379          | 1,503          | 1,541          | 1,600          | 1,714          | 1,810          | 1,864          | 1,902          | 1,934          |
| Singapore                  | 768            | 723            | 798            | 804            | 800            | 791            | 795            | 812            | 816            | 819            | 814            |
| Taiwan                     | 2,497          | 2,518          | 2,680          | 2,761          | 2,835          | 2,892          | 2,933          | 2,975          | 3,018          | 3,070          | 3,117          |
| Thailand                   | 1,710          | 1,554          | 1,724          | 1,804          | 1,835          | 1,900          | 2,051          | 2,145          | 2,201          | 2,245          | 2,284          |
| Vietnam                    | 1,790          | 1,761          | 1,688          | 1,774          | 1,711          | 1,805          | 1,930          | 1,996          | 2,063          | 2,128          | 2,180          |
| <b>Total APAC</b>          | <b>122,188</b> | <b>119,753</b> | <b>132,042</b> | <b>136,512</b> | <b>140,903</b> | <b>144,699</b> | <b>148,099</b> | <b>152,362</b> | <b>155,815</b> | <b>158,444</b> | <b>160,939</b> |
| <b>Total APAC ex-China</b> | <b>64,744</b>  | <b>63,043</b>  | <b>71,795</b>  | <b>75,607</b>  | <b>76,578</b>  | <b>78,151</b>  | <b>81,096</b>  | <b>84,350</b>  | <b>86,877</b>  | <b>88,906</b>  | <b>90,625</b>  |

### Online Video Industry Revenue (US\$ mil.)

| Country                    | 2019          | 2020          | 2021          | 2022          | 2023          | 2024          | 2025          | 2026          | 2027          | 2028          | 2029          |
|----------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Australia                  | 2,592         | 3,094         | 4,243         | 4,931         | 5,594         | 6,326         | 7,040         | 7,705         | 8,226         | 8,652         | 9,008         |
| China                      | 20,930        | 21,377        | 24,061        | 25,636        | 28,563        | 30,576        | 32,502        | 34,010        | 35,475        | 36,644        | 37,831        |
| Hong Kong                  | 293           | 292           | 349           | 390           | 434           | 488           | 532           | 565           | 592           | 614           | 634           |
| India                      | 1,180         | 1,509         | 2,119         | 2,958         | 3,801         | 4,320         | 5,137         | 6,128         | 7,288         | 8,113         | 8,917         |
| Indonesia                  | 456           | 584           | 863           | 1,129         | 1,321         | 1,564         | 1,740         | 1,943         | 2,130         | 2,295         | 2,445         |
| Japan                      | 4,340         | 5,409         | 7,254         | 8,578         | 9,670         | 10,916        | 12,083        | 13,078        | 14,018        | 14,842        | 15,560        |
| Korea                      | 1,687         | 2,047         | 2,806         | 3,410         | 3,748         | 4,258         | 4,666         | 5,092         | 5,457         | 5,743         | 5,998         |
| Malaysia                   | 171           | 204           | 267           | 335           | 380           | 451           | 513           | 571           | 625           | 670           | 712           |
| New Zealand                | 370           | 475           | 612           | 681           | 730           | 780           | 838           | 894           | 943           | 982           | 1,014         |
| Philippines                | 257           | 321           | 413           | 519           | 615           | 696           | 775           | 838           | 897           | 951           | 1,002         |
| Singapore                  | 211           | 220           | 293           | 341           | 377           | 421           | 459           | 494           | 518           | 541           | 559           |
| Taiwan                     | 537           | 632           | 789           | 893           | 1,028         | 1,141         | 1,220         | 1,291         | 1,356         | 1,421         | 1,479         |
| Thailand                   | 427           | 481           | 666           | 773           | 898           | 1,057         | 1,202         | 1,322         | 1,411         | 1,487         | 1,557         |
| Vietnam                    | 589           | 542           | 579           | 647           | 699           | 788           | 877           | 955           | 1,029         | 1,097         | 1,149         |
| <b>Total APAC</b>          | <b>34,039</b> | <b>37,187</b> | <b>45,314</b> | <b>51,222</b> | <b>57,858</b> | <b>63,771</b> | <b>69,585</b> | <b>74,882</b> | <b>79,965</b> | <b>84,052</b> | <b>87,864</b> |
| <b>Total APAC ex-China</b> | <b>13,109</b> | <b>15,810</b> | <b>21,253</b> | <b>25,586</b> | <b>29,295</b> | <b>33,195</b> | <b>37,082</b> | <b>40,873</b> | <b>44,490</b> | <b>47,408</b> | <b>50,034</b> |

## Market Deep-dives

| 2019-24     | 2024-29     |
|-------------|-------------|
| 6.4%        | 3.5%        |
| 3.0%        | 1.1%        |
| 1.2%        | 1.8%        |
| 4.4%        | 6.4%        |
| 4.2%        | 5.3%        |
| 2.6%        | 1.6%        |
| 7.0%        | 2.5%        |
| -0.2%       | 2.5%        |
| 4.4%        | 1.0%        |
| 2.7%        | 3.9%        |
| 0.6%        | 0.6%        |
| 3.0%        | 1.5%        |
| 2.4%        | 3.4%        |
| 0.2%        | 3.8%        |
| <b>3.4%</b> | <b>2.2%</b> |
| <b>3.8%</b> | <b>3.0%</b> |

| 2019-24      | 2024-29     |
|--------------|-------------|
| 19.5%        | 7.3%        |
| 7.9%         | 4.4%        |
| 10.7%        | 5.4%        |
| 29.6%        | 15.6%       |
| 27.8%        | 9.5%        |
| 20.3%        | 7.3%        |
| 20.3%        | 7.1%        |
| 21.4%        | 9.6%        |
| 16.1%        | 5.4%        |
| 22.0%        | 7.6%        |
| 14.8%        | 5.9%        |
| 16.3%        | 5.3%        |
| 19.9%        | 8.0%        |
| 6.0%         | 7.8%        |
| <b>13.4%</b> | <b>6.8%</b> |
| <b>20.4%</b> | <b>8.8%</b> |

| Macro Indicators                      | Unit         | 2019        | 2020        | 2021        | 2022        | 2023        | 2024        | 2025        | 2026        | 2027        | 2028        | 2029        | % CAGR 2024-29        |
|---------------------------------------|--------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-----------------------|
| Population                            | 000s         | 25,349      | 25,577      | 25,782      | 25,988      | 26,194      | 26,389      | 26,584      | 26,779      | 26,974      | 27,168      | 27,363      | 0.7%                  |
| % Growth                              | %            | -           | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          |                       |
| Households                            | 000s         | 9,509       | 9,575       | 9,645       | 9,705       | 9,765       | 9,820       | 9,875       | 9,930       | 9,985       | 10,040      | 10,095      | 0.6%                  |
| % Growth                              | %            | -           | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          |                       |
| <b>Broadband Universe</b>             | <b>Units</b> | <b>2019</b> | <b>2020</b> | <b>2021</b> | <b>2022</b> | <b>2023</b> | <b>2024</b> | <b>2025</b> | <b>2026</b> | <b>2027</b> | <b>2028</b> | <b>2029</b> | <b>% CAGR 2024-29</b> |
| Fixed Broadband Subs                  | mil.         | 7.6         | 7.6         | 7.5         | 7.6         | 7.9         | 8.0         | 8.2         | 8.4         | 8.6         | 8.8         | 9.0         | 2.2%                  |
| % Growth                              | %            | -           | 1%          | -2%         | 2%          | 3%          | 2%          | 2%          | 2%          | 2%          | 2%          | 2%          |                       |
| ADSL                                  | mil.         | 1.4         | 0.9         | 0.3         | 0.2         | 0.1         | 0.1         | 0.1         | 0.0         | 0.0         | 0.0         | 0.0         | -100.0%               |
| % Growth                              | %            | -           | -35%        | -65%        | -46%        | -22%        | -24%        | -40%        | -83%        | -100%       | na          | na          |                       |
| Cable                                 | mil.         | 1.9         | 1.9         | 1.9         | 1.9         | 1.9         | 1.9         | 1.8         | 1.7         | 1.7         | 1.6         | 1.6         | -2.9%                 |
| % Growth                              | %            | -           | 3%          | -2%         | 0%          | 1%          | -4%         | -3%         | -3%         | -3%         | -2%         | -2%         |                       |
| FTTx                                  | mil.         | 4.3         | 4.8         | 5.3         | 5.5         | 5.8         | 6.1         | 6.4         | 6.7         | 6.9         | 7.1         | 7.4         | 3.9%                  |
| % Growth                              | %            | -           | 11%         | 10%         | 5%          | 5%          | 5%          | 5%          | 4%          | 4%          | 3%          | 3%          |                       |
| Pen. of Fixed Broadband as % of Hts   | %            | 80%         | 80%         | 77%         | 78%         | 81%         | 82%         | 83%         | 85%         | 86%         | 88%         | 89%         |                       |
| Monthly Fixed Broadband ARPU          | US\$         | 37.8        | 38.3        | 37.8        | 37.9        | 37.9        | 37.9        | 37.9        | 37.9        | 37.9        | 37.9        | 37.9        |                       |
| Fixed Broadband Revenue               | US\$ mil.    | 3,360.9     | 3,490.2     | 3,429.0     | 3,423.0     | 3,511.5     | 3,614.0     | 3,699.4     | 3,780.1     | 3,859.7     | 3,947.4     | 4,038.3     | 2.2%                  |
| % Growth                              | %            | -           | 4%          | 0%          | 3%          | 3%          | 3%          | 2%          | 2%          | 2%          | 2%          | 2%          |                       |
| Mobile Subs                           | mil.         | 28.0        | 27.0        | 27.3        | 28.7        | 29.4        | 29.8        | 30.2        | 30.5        | 30.8        | 31.1        | 31.4        | 1.0%                  |
| % Growth                              | %            | -           | -3%         | 1%          | 5%          | 2%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          |                       |
| 2G                                    | mil.         | 0.0         | 0.0         | 0.0         | 0.0         | 0.0         | 0.0         | 0.0         | 0.0         | 0.0         | 0.0         | 0.0         | 0.0%                  |
| % Growth                              | %            | -           | na          | na          | na          | na          | na          | na          | na          | na          | na          | na          |                       |
| 3G                                    | mil.         | 3.9         | 2.7         | 1.3         | 1.1         | 0.3         | 0.0         | 0.0         | 0.0         | 0.0         | 0.0         | 0.0         | 0.0%                  |
| % Growth                              | %            | -           | -30%        | -52%        | -18%        | -67%        | -100%       | na          | na          | na          | na          | na          |                       |
| 4G                                    | mil.         | 23.9        | 23.6        | 23.6        | 23.6        | 21.5        | 18.2        | 14.9        | 13.1        | 11.4        | 10.0        | 8.5         | -14.1%                |
| % Growth                              | %            | -           | -1%         | 0%          | 0%          | -9%         | -15%        | -18%        | -12%        | -13%        | -13%        | -15%        |                       |
| 5G                                    | mil.         | 0.2         | 0.7         | 2.4         | 4.0         | 7.5         | 11.6        | 15.3        | 17.4        | 19.4        | 21.1        | 22.9        | 14.5%                 |
| % Growth                              | %            | -           | 215%        | 264%        | 67%         | 86%         | 55%         | 32%         | 14%         | 11%         | 9%          | 8%          |                       |
| Prepaid Share of Mobile Subs          | %            | 37%         | 35%         | 35%         | 37%         | 37%         | 38%         | 38%         | 38%         | 39%         | 39%         | 39%         |                       |
| Postpaid Share of Mobile Subs         | %            | 63%         | 65%         | 65%         | 63%         | 63%         | 62%         | 62%         | 62%         | 61%         | 61%         | 61%         |                       |
| Mobile Broadband Subs                 | mil.         | 26.8        | 27.0        | 27.3        | 28.7        | 29.4        | 29.8        | 30.2        | 30.5        | 30.8        | 31.1        | 31.4        | 1.0%                  |
| % Growth                              | %            | -           | 1%          | 1%          | 5%          | 2%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          |                       |
| Pen. of Mobile Broadband as % of Pop. | %            | 106%        | 105%        | 106%        | 110%        | 112%        | 113%        | 114%        | 114%        | 114%        | 115%        | 115%        |                       |
| Monthly Mobile Broadband ARPU         | US\$         | 17.2        | 17.2        | 18.3        | 18.9        | 19.1        | 19.5        | 19.8        | 20.2        | 20.7        | 21.0        | 21.3        |                       |
| Mobile Broadband Revenue              | US\$ mil.    | 5,412.5     | 5,556.7     | 5,963.3     | 6,343.9     | 6,665.4     | 6,918.4     | 7,140.1     | 7,354.4     | 7,612.0     | 7,807.4     | 7,990.6     | 2.9%                  |

# Pricing & Packaging Database

## Online Video Packagings

| PLATFORM           | MODEL | TIER          | PRICE (AUD) | FREE TRIAL | PARTNER       | PARTNERSHIP TYPE                   | PACK/PRICING                          | NOTES  |
|--------------------|-------|---------------|-------------|------------|---------------|------------------------------------|---------------------------------------|--|
| Amazon Prime Video | SVOD  | Ads 1mo       | 9.99        | 30d        | Fetch, Foxtel | STB Integration                    | na                                    | na   |
|                    |       | No Ads 1mo    | 12.98       |            |               |                                    |                                       |  |
| Amazon Prime Video | SVOD  | Ads 1mo       | 9.99        | 30d        | Optus         | Carrier Billing<br>Free Trial      | Free 6 month trial to new subscribers | na   |
|                    |       | No Ads 1mo    | 12.98       |            |               |                                    |                                       |  |
| Amazon Prime Video | SVOD  | Ads 1mo       | 9.99        | 30d        | Telstra       | Carrier Billing<br>STB Integration | na                                    | na   |
|                    |       | No Ads 1mo    | 12.98       |            |               |                                    |                                       |  |
| Acorn TV           | SVOD  | 1mo           | 6.99        | 7d         | na            | na                                 | na                                    | na   |
| AMC Plus           | SVOD  | 1mo           | 8.99        | 7d         | na            | na                                 | na                                    | na   |
|                    |       | 12mo          | 83.88       |            |               |                                    |                                       |  |
| Apple TV+          | SVOD  | 1mo           | 12.99       | 7d         | Telstra       | Free Trial<br>STB Integration      | na                                    | Free 3-month trial with eligible device purchase direct from Apple |
| Apple TV+          | SVOD  | 1mo           | 12.99       | 7d         | Fetch         | STB Integration                    | na                                    | Free 3-month trial with eligible device purchase direct from Apple |
| Disney+            | SVOD  | Standard 1mo  | 13.99       | na         | Fetch         | Carrier Billing<br>STB integration | na                                    | na   |
|                    |       | Standard 12mo | 139.99      |            |               |                                    |                                       |  |
|                    |       | Premium 1mo   | 17.99       |            |               |                                    |                                       |  |
|                    |       | Premium 12mo  | 179.99      |            |               |                                    |                                       |  |
| Disney+            | SVOD  | Standard 1mo  | 13.99       | na         | Foxtel        | STB Integration                    | na                                    | na   |
|                    |       | Standard 12mo | 139.99      |            |               |                                    |                                       |  |
|                    |       | Premium 1mo   | 17.99       |            |               |                                    |                                       |  |
|                    |       | Premium 12mo  | 179.99      |            |               |                                    |                                       |  |
| Disney+            | SVOD  | Standard 1mo  | 13.99       | na         | Telstra       | Carrier Billing<br>STB Integration | Monthly plan only, standard pricing.  | na   |
|                    |       | Standard 12mo | 139.99      |            |               |                                    |                                       |  |
|                    |       | Premium 1mo   | 17.99       |            |               |                                    |                                       |  |
|                    |       | Premium 12mo  | 179.99      |            |               |                                    |                                       |  |
| Disney+            | SVOD  | Standard 1mo  | 13.99       | na         | Telstra       | Carrier Billing<br>STB Integration | Monthly plan only, standard pricing.  | na   |
|                    |       | Standard 12mo | 139.99      |            |               |                                    |                                       |  |
|                    |       | Premium 1mo   | 17.99       |            |               |                                    |                                       |  |
|                    |       | Premium 12mo  | 179.99      |            |               |                                    |                                       |  |

## Pay-tv Packagings

### Fetch TV

#### Channels Summary

| Total # of Channels   |     |
|-----------------------|-----|
| # HD                  | 7   |
| # SD                  | 113 |
| FTA/Freeview Channels | 32  |

| Channel Packs  | # of Packs | # of Channels | Price Range (US\$) |
|----------------|------------|---------------|--------------------|
| Entry Level    | 4          | 5 - 19        | 4.0                |
| Mid-Range      | 1          | 44            | 13.3               |
| Add-On Packs   | 2          | 3 - 4         | 10.1               |
| Add-On Channel | -          | 4             | 4.7 - 6.7          |

### Foxtel

#### Channels Summary

| Total # of Channels |     |
|---------------------|-----|
| # HD                | 2   |
| # SD                | 102 |

| Channel Packs   | # of Packs | # of Channels | Price Range (US\$) |
|-----------------|------------|---------------|--------------------|
| Base Pack       | 1          | 60            | 48.7               |
| Bundled Packs   | 4          | 69 - 79       | 44.7 - 65.3        |
| Add-on packs    | 2          | 9 - 10        | 16.7 - 20.0        |
| Add-on channels | -          | 2             | 15.3               |

# Country Profiles

## Key Highlights & Sectors Analysis

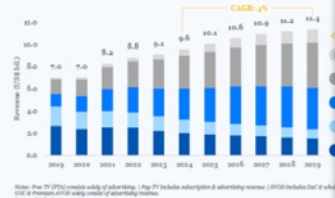
Asia Pacific Video & Broadband Industry

# Australia

Navigation

### Key Highlights

#### Video Industry Economics



Note: Pay-TV (FTA) revenue only of advertising. Pay-TV includes subscription & advertising revenue. (FVID) includes DAB & other DAB & Premium & Pay-TV revenue of advertising revenue. Source: Media Partners Asia

Streaming platforms continue to sustain the video industry as TV further contracts in value and viewership, advertising continues to shift online with major Free-To-Air (FTA) broadcasters heading through Broadcast Video-on-Demand (BVOD) platforms. Major BVOD players, including Netflix and Amazon Prime Video, have introduced ad tiers with impact. The Free, ad-supported TV (FAST) ecosystem has grown in recent years despite ongoing BVOD, SVOD and FAST ad each also capitalizing on ad-supported TV (TV) penetration, which is set to grow from 54% of homes in 2024 to 60% by 2029. The Subscription Video-on-Demand (SVOD) market is mature but still growing with the launch of NBS's MAX service in 2023 set to create a niche over the short to medium term. The UGC / social video sector remains stable, led by YouTube. Because of its size and maturity, market consolidation is inevitable and required, with NBS activity set to accelerate after 2023, potentially impacting players such as Foxtel, Nine Entertainment and Paramount amongst others. A consortium of operators, led by DAZN, are speculated to acquire the 51% and 51% respective stakes owned by News Corp. and Telstra in Foxtel by end of 2024 or in 2025.

The video industry is projected to grow 3.5% CAGR over 2024-29, generate US\$14.4 bln. in revenue by 2029, having grown by 1.6% in 2023. Revenue is driven by online video by: (1) the premium VOD sector, which is set to add US\$1.4 bln to the video pie over 2024-29, including US\$0.9 bln in subscriptions and US\$0.5 bln in advertising; and (2) UGC / social video, which will add US\$1.4 bln in advertising. Premium VOD will have a 40% share of industry revenue with UGC / Social Video at end TV, including subscriptions and advertising. Ad-supported TV will continue to grow between 2024-29, at per MPA present including advertising and subscriptions. TV advertising remains challenged, significant deterioration in 2023 and weaker ad 2024. The BVOD category has shown steady growth, partially offsetting TV losses. FTA also has experienced a consistent decline in viewership, especially among younger audiences. The BVOD category has shown steady growth, partially offsetting TV losses. FTA also has experienced a consistent decline in viewership, especially among younger audiences. In addition, viewers are spending their attention across various platforms, making it harder for linear TV to capture large, homogeneous audiences. Broadcasted FVID platforms (i.e. 5G and 4G) are

### Television

#### Leading TV Broadcasters by Revenue (CYE Dec. 2024)



#### Leading Pay-TV Operators by Subscribers (2024)



The FTA market is undergoing a significant transformation. While linear TV viewership is declining, BVOD platforms are growing rapidly. The main TV groups include: (1) Seven West Media, which owns Channel Seven, ten, two, and BVOD platform 9Now; (2) Nine Entertainment, which owns Channel Nine, 9Gem, 9Life, and BVOD platform 9Now; (3) Paramount ANZ (formerly Ten Network Holdings), which owns Channel 10, 10 Bold, 10 Peach, and BVOD platform 10 Play; (4) Special Broadcasting Service (SBS), which is government-funded, and owns SBS and SBS Visuals; and (5) the Australian Broadcasting Corporation (ABC), also government-funded and owning ABC, ABC Comedy, ABC Me, ABC News.

Traditional TV viewing remains in decline, especially among younger audiences. This is driven by the rise of streaming through FTA still reaches a large portion of the Australian population, especially for live events and news. Lower viewership has translated to heavy declines in TV advertising as dollars migrate to BVOD, SVOD and UGC / social video.

BVOD continues to rise, driven by FTA-owned 9Now, 9Gem, and 10 Play, which are experiencing strong growth in viewership and ad revenue. This is driven by catch-up TV, live streaming, and exclusive online content with BVOD much on CTV growing strong on mobile, tablets.

### Broadband

#### Leading Mobile Operators by Subscribers (Q3 2024)



#### Leading Fixed Broadband Operators by Subscribers (Q3 2024)

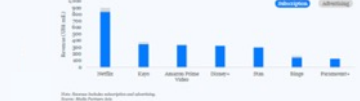


The home broadband market is mature. The National Broadband Network (NBN) is the dominant infrastructure, with most providers offering services over its network. Telstra remains the market leader with ~40% market share, followed by TPO Telecom (Optus) and Optus (Optus). NBN's (Middle Virtual Network Operator) Vocus and Aussie Broadband are smaller but notable players. There remains a growing demand for higher speed plans as data consumption increases, driven by streaming and gaming. Fixed Wireless and 5G Home Broadband technologies are becoming increasingly popular alternatives to fixed-line NBN, especially in areas with limited NBN availability or for those seeking faster speeds.

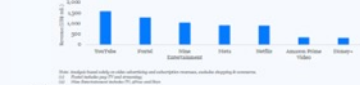
The mobile market is also mature, with high penetration rates. However, competition remains intense, and 5G is driving new development. Telstra leads with 40% market share, followed by Optus (34%) and TPO Telecom (22%). NBN's (Middle Virtual Network Operator) Vocus and Aussie Broadband are smaller but notable players. There remains a growing demand for higher speed plans as data consumption increases, driven by streaming and gaming. Fixed Wireless and 5G Home Broadband technologies are becoming increasingly popular alternatives to fixed-line NBN, especially in areas with limited NBN availability or for those seeking faster speeds.

### Online Video

#### Premium VOD Platforms by Revenue (CYE Dec. 2024)



#### Leading Video Platforms by Revenue (CYE Dec. 2024)



YouTube leads the UGC / Social Video category in Australia. Its subscription service, YouTube Premium and Music saw continued growth in 2024, driven by ad-free viewing, background playback, and YouTube Music's appeal. YouTube's ad business is large and material with high engagement driven by diverse content, including local creators, music, and educational videos. YouTube Shorts has contributed to increased time spent on the platform. TikTok's user base continues to grow in Australia, driven by its short-form video format, trends, and algorithm-driven content discovery. Short-form, high engagement with TikTok users spending significant time on the platform due to addictive nature of short-form videos and "For You" page.

The SVOD category spent A\$31 m. (-US\$290 m) on Australian programs in the FYE 2024 period, up from A\$19 m. in 2023, according to data from ANMA. The data includes figures provided on a voluntary basis from Amazon Prime Video, Disney+, Netflix, Paramount+ and Stan. In addition to expenditure on Australian content, OTT providers also spent A\$100 m. on acquiring, producing, or licensing to end-user.

Australian-related programs, which meet some, but not all the criteria to be classified as Australian content. Fetch has experienced continued growth in the SVOD category, across Kayo (sports) and Bingie (entertainment). Bingie's growth was fueled by popular HBO and Warner Bros. Discovery content, which expires next year as HBO launches MAX in the market. It is likely that MAX will enter the market with a partnership strategy focused on a bundled / bundled one offering with Fetch, Bingie and Telstra. Both Kayo and Bingie have seen a significant uplift in ad sales. Kayo holds the streaming rights to popular sports rights including AFL, NRL and Motorsport and Cricket.

Netflix remains the leading SVOD player in Australia in terms of subscribers and monetization. Subscriber growth has slowed given maturity and the fact that Netflix has already penetrated 70% of all households. Netflix continues to invest in local original series, with some notable success in Australia. Its ad tier is growing steadily with an estimated adoption of 1 m. subs at end-2024.

# Table Of Contents

## **Executive Summary**

Asia Pacific Video Industry Economics

Video Industry Economics by Market (CY2024)

Video Industry Economics by Market (2029)

Video Industry Growth by Market (2024)

Market Leaders In The Video Economy: Share of Video Industry Revenue (CY 2024)

Market Leaders In The Premium VOD Economy: Share of Premium VOD Revenue (CY 2024)

Top VOD Platforms in Asia Pacific (CY 2024)

## **Market**

### **Key Highlights**

Video Industry Economics

Consumer Spend on Video

Leading Video Platforms by Revenue (CYE Dec. 2024)

### **Television**

Leading TV Broadcasters by Revenue (CYE Dec. 2024)

Leading Pay-TV Operators by Subscribers (2024)

### **Broadband**

Leading Mobile Operators by Subscribers (Q3 2024)

Leading Fixed Broadband Operators by Subscribers (Q3 2024)

Connectivity Landscape

### **Online Video**

Online Video Industry Economics

Premium VOD Platforms by Revenue (CYE Dec. 2024)

Leading VOD Platforms – Subscribers & ARPUs (2024)

Pricing, Packaging & Partnerships – Online Video

### **Pay-TV**

Pricing, Packaging & Partnerships – Pay-TV



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To find out more about Asia Pacific Video & Broadband Industry 2025 or to buy the report please contact:

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