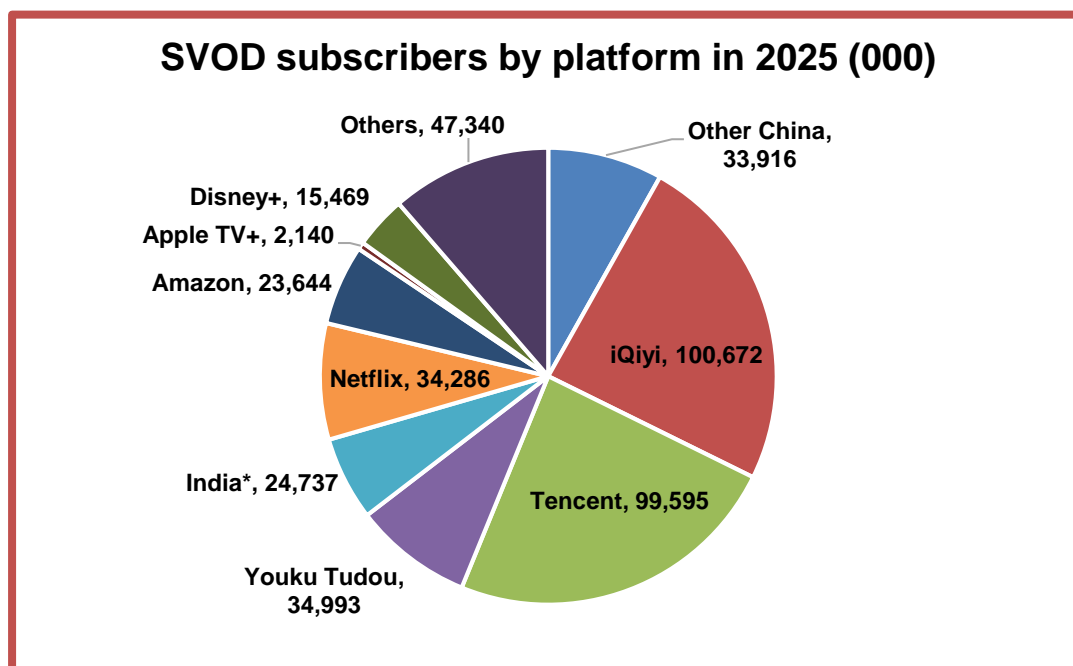


Asia Pacific set for 417 million SVOD subs

Despite the negative impact from the coronavirus and the Chinese economic downturn, Asia Pacific will have 417 million SVOD subscriptions by 2025, up from 269 million in 2019.

China will have 269 million SVOD subscriptions in 2025 – or 65% of the region’s total. India will supply a further 45 million – more than double its 2019 total.



Source: Digital TV Research. * excluding US-based platforms

Three Chinese companies will top the Asia Pacific SVOD subscriber rankings in 2025 – with two recording 100 million subscribers. Never expected to operate as standalone platforms in China, Netflix and Amazon Prime Video will take fourth and fifth places respectively.

Simon Murray, Principal Analyst at Digital TV Research, said: “China will also dominate the SVOD revenue rankings. The top five platforms [Tencent Video, Iqiyi, Netflix, Disney+ and Youku Tudou] will account for two-thirds of the region’s SVOD revenues by 2025.”

Netflix’s revenues will more than double between 2019 and 2025 to \$3.19 billion. Disney+ will generate \$1 billion in 2025, despite starting only recently.

Murray continued: “Asia Pacific SVOD revenues will reach \$18.25 billion in 2025; up by \$8 billion on 2019. These forecasts are lower than our previous edition.”

Asia Pacific OTT TV & Video Forecasts

Table of Contents

Published in March 2020, this 212-page PDF, PowerPoint and excel report provides extensive research for 22 territories. **Covering movies and TV episodes**, the report comes in three parts:

- Outlook: Forecasts for 22 countries in a 49-page PowerPoint document full of charts, graphs and bullet points;
- Excel workbook covering each year from 2010 to 2025 for 22 countries by household penetration, by SVOD subscribers and by OTT revenues for movies and TV episodes. As well as summary tables by country and by platform;
- Insight: Detailed country-by-country analysis in a 96-page PDF document.

For more information, [please click here](#) or contact lydia@digitaltvresearch.com



Forecasts for the following 145 platforms across 22 countries:

Country	SVOD ops	SVOD Platforms
Australia	6	Netflix; Amazon Prime Video; Disney+; Apple TV+; Stan; Foxtel Now
Bangladesh	4	Netflix; Amazon Prime Video; Disney+; Iflix
Cambodia	6	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Iflix
China	3	Youku Tudou; IQiyi; Tencent Video
Hong Kong	7	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; MyTV Super; Viu
India	12	Netflix; Amazon Prime Video; Disney+; Apple TV+; Zee 5; Hotstar; Sony Liv; ALT Balaji; Eros Now; HOOQ; Spuul; Yupp TV
Indonesia	9	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Iflix; HOOQ; Catchplay; Viu
Japan	9	Netflix; Amazon Prime Video; Disney+; Apple TV+; Hulu; Tsutaya; U-Next; Avex dtv; au Smart Pass
Laos	5	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO
Malaysia	7	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Iflix; Viu
Mongolia	5	Netflix; Amazon Prime Video; Disney+; Apple TV+; Viu
Myanmar	4	Netflix; Amazon Prime Video; Disney+; Iflix
Nepal	4	Netflix; Amazon Prime Video; Disney+; Iflix
New Zealand	6	Netflix; Amazon Prime Video; Disney+; Apple TV+; Lightbox; Neon
Pakistan	5	Netflix; Amazon Prime Video; Disney+; Iflix; Starz Play
Philippines	8	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Iflix; HOOQ; Viu
Singapore	8	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; HOOQ; Catchplay; Viu
South Korea	11	Netflix; Amazon Prime Video; Disney+; HBO; Watcha Play; Tving; LG U+; Olleh TV; Seezn; Wavve; Pooq
Sri Lanka	5	Netflix; Amazon Prime Video; Disney+; Apple TV+; Iflix
Taiwan	6	Netflix; Amazon Prime Video; Disney+; Apple TV+; Catchplay; CHT
Thailand	9	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Iflix; HOOQ; Viu; True ID
Vietnam	6	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Iflix

SAMPLE: Sri Lanka OTT TV & video insight

- **OTT movies and TV episodes revenues** will increase from \$10 million in 2019 to \$39 million by 2025. SVOD will bring in 85% of the 2025 total. There were 116,000 **SVOD subscriptions** by end-2019, growing to 412,000 in 2025.

Main assumptions behind the forecasts
• Much of the initial OTT activity involved local players, but Indian players will become more active.
• Iflix has started
• Broadband penetration and smartphone ownership are low.
• Data plans are expensive.
<i>Source: Digital TV Research</i>

- **Piracy** is a major problem, with about 300,000 homes receiving illegal satellite TV signals from 500 operators according to the Ministry of Mass Media & Information.
- **Netflix** launched in January 2016. We estimate 67,000 Netflix subs by end-2019, rising to 173,000 by 2025. Growth will be restricted by low credit card ownership, relatively high prices and low broadband penetration.
- **Amazon Prime Video** started operations in November 2016 as part of its global rollout. Subscriptions are cheaper than Netflix at \$5.99/month, but Amazon offers little original or local content. We forecast 33,000 Amazon subs by 2025.
- **Disney+** will launch in Asia Pacific countries between November 2019 and September 2021. We believe that Sri Lanka will be one of the later countries. We forecast 68,000 Disney+ subscribers by 2025.
- **Apple TV+** started in Sri Lanka as part of its November 2019 international rollout.
- **Iflix** continued its Asian expansion by launching in Sri Lanka (with Sinhalese subtitles) in August 2016. Iflix costs LKR449/month (\$2.52). Iflix is carried by mobile operator Dialog. We forecast 27,000 subscribers by 2025.
- Bollywood-based **YuppTV** received \$50 million investment from KKR-owned Emerald Media in October 2016. Started a year earlier, YuppTV (\$1.45/month) transmits in 13 languages. YuppTV provides 200 linear channels, 2,000 movies (YuppFlix) and more than 100 TV shows. YuppTV screens some cricket.
- **Eros Now** (LKR100/month) joined Dialog's Viu OTT platform in June 2018. Eros Now offers 20,000 hours of content in 10 languages. **ALT Balaji** was added to Dialog in the same month (LKR160/month).

- Pay TV leader **Dialog Satellite TV** had 1.43 million satellite TV subs by end-2019. Viu operates the OTT platform, which includes access to several Indian platforms and Iflix (LKR449/month).
- Dialog also operates the FTA DTT platform. Majority owned by Malaysia's Axiata Group (83.32%), Dialog Axiata plc is also a key broadband and mobile operator (14.89 million subscribers by end-2019, of which 56% had smartphones) in Sri Lanka. As well as Netflix, mobile subscribers can access India's Zee 5 OTT platform (LKR350/month).
- SLT's **Mobitel** provides a TV catch-up service as well as access to music videos. Mobitel has 6.8 million subscribers.
- **Sri Lanka Telecom** launched the Peo TV IPTV service (also known as SLT Visioncom) in September 2008. After a slow start, IPTV subscriptions are taking off, with 471,000 recorded by end-2019. SLT wants 1 million Peo TV subscribers (including OTT) by 2021. An OTT platform followed in partnership with India's Hungama.
- SLT also offers quad-play services. The company is constructing a next generation fiber network (up to 100Mbps. Branded as Smartline). SLT is 49.50% owned by the Treasury and 44.98% by Global Telecommunications Holdings.
- **Airtel's** Mobile TV provides access to TV channels and movies for LKR150/month. Airtel has 1.8 million mobile subscribers. **Etisalat** provides a similar mobile TV platform (LKR50-200/month). CK Hutchison's **Hutch** merged with Etisalat in late 2018, with about 7 million subscribers combined.
- TRC estimated 1.65 million fixed broadband and 11.75 million mobile broadband subscribers by end-2019.

Sri Lanka OTT TV & video forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Population (000)																
Total households (000)																
TV households (000)																
Fixed broadband hholds (000)																
Smartphone subscribers (000)																
Tablet subscribers (000)																
TV HH/Total HH																
Fixed broadband HH/Total HH																
Smartphone subs/Population																
Tablet subs/Population																
OTT TV & video fixed broadband households (000)																
OTT TV & video HH/Fixed broadband HH																
OTT TV & video HH/TV HH																
OTT TV & video smartphone subs (000)																
OTT TV & video HH/smartphone subs																
Gross OTT TV & video total (000)																
Gross SVOD subscriptions (000)																
SVOD subs/TVHH																
SVOD subs/Fixed bband HH																
SVOD subs/Smartphone users																
Net SVOD homes (000)																
SVOD homes/TVHH																
SVOD homes/Fixed bband HH																
SVOD subscrips/SVOD homes																
TV rental transactions (000)																
Movie rental transactions (000)																
Total rental transactions (000)																
TV DTO transactions (000)																
Movie DTO transactions (000)																
Total download-to-own transactions (000)																
Online advg total (US\$ mil.)																



Sri Lanka OTT TV & video forecasts

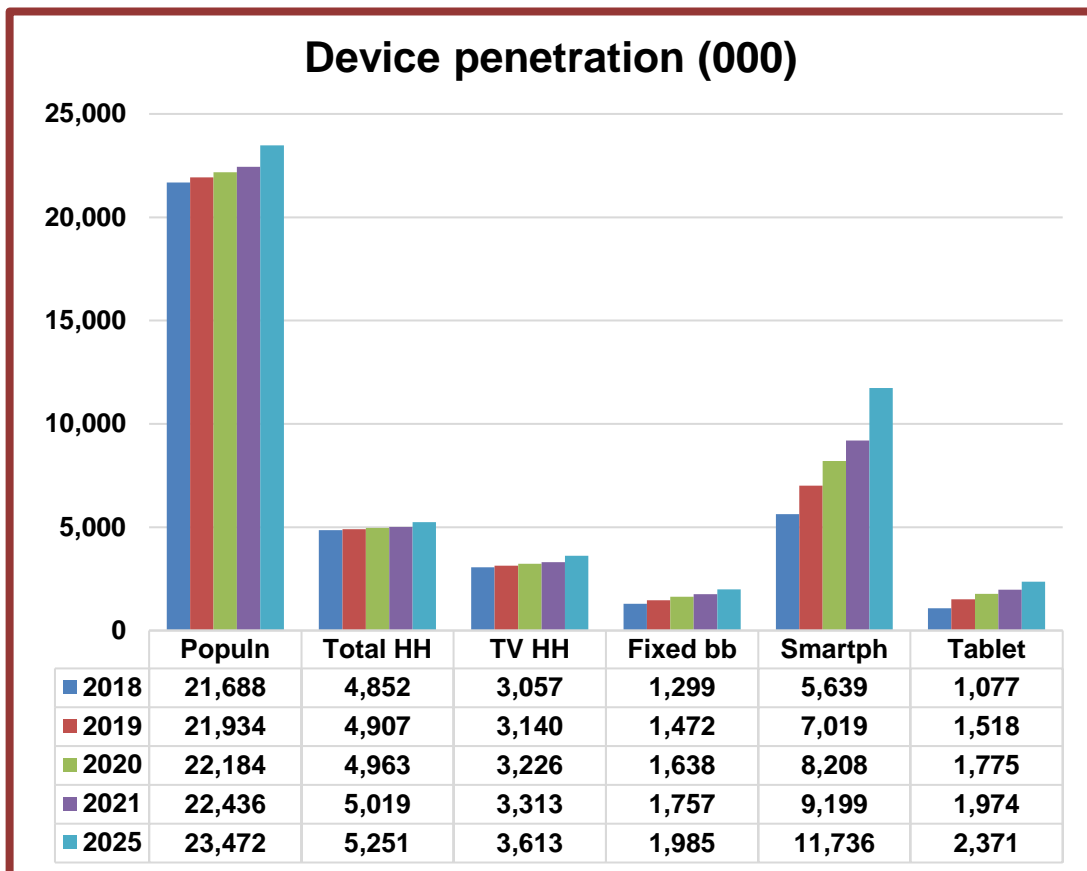
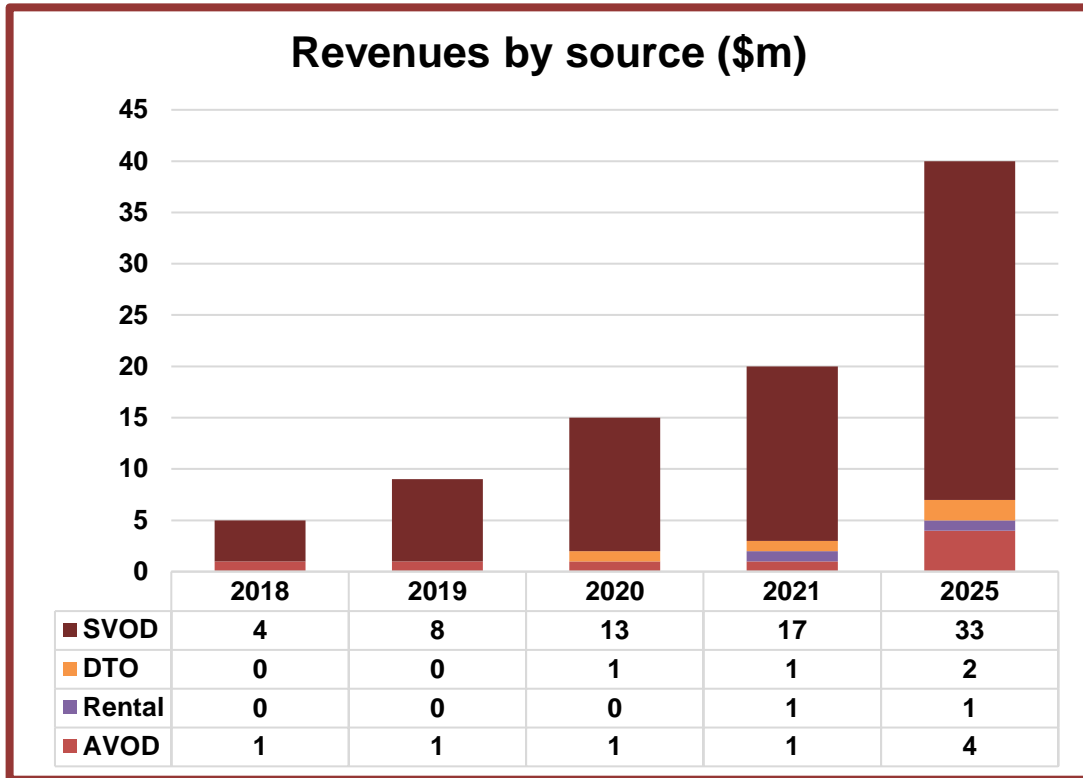
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
AVOD (US\$ mil.)																
Online TV rental revs (US\$ mil.)																
Online movie rent revs (US\$ mil.)																
Online rental revenues (US\$ mil.)																
DTO TV revenues (US\$ mil.)																
DTO movie revenues (US\$ mil.)																
DTO video revenues (US\$ mil.)																
SVOD revenues (US\$ mil.)																
OTT TV & video revs (\$ mil.)																
SVOD subscribers by operator (000)																
Netflix																
Amazon Prime																
Disney+																
Apple TV+																
iFlix																
Others																
Share of SVOD subscribers by operator (%)																
Netflix																
Amazon Prime																
Disney+																
Apple TV+																
iFlix																
Others																
SVOD revenues by operator (US\$ mil.)																
Netflix																
Amazon Prime																
Disney+																
Apple TV+																
iFlix																
Others																
Share of SVOD revenues by operator (%)																
Netflix																
Amazon Prime																
Disney+																
Apple TV+																
iFlix																
Others																



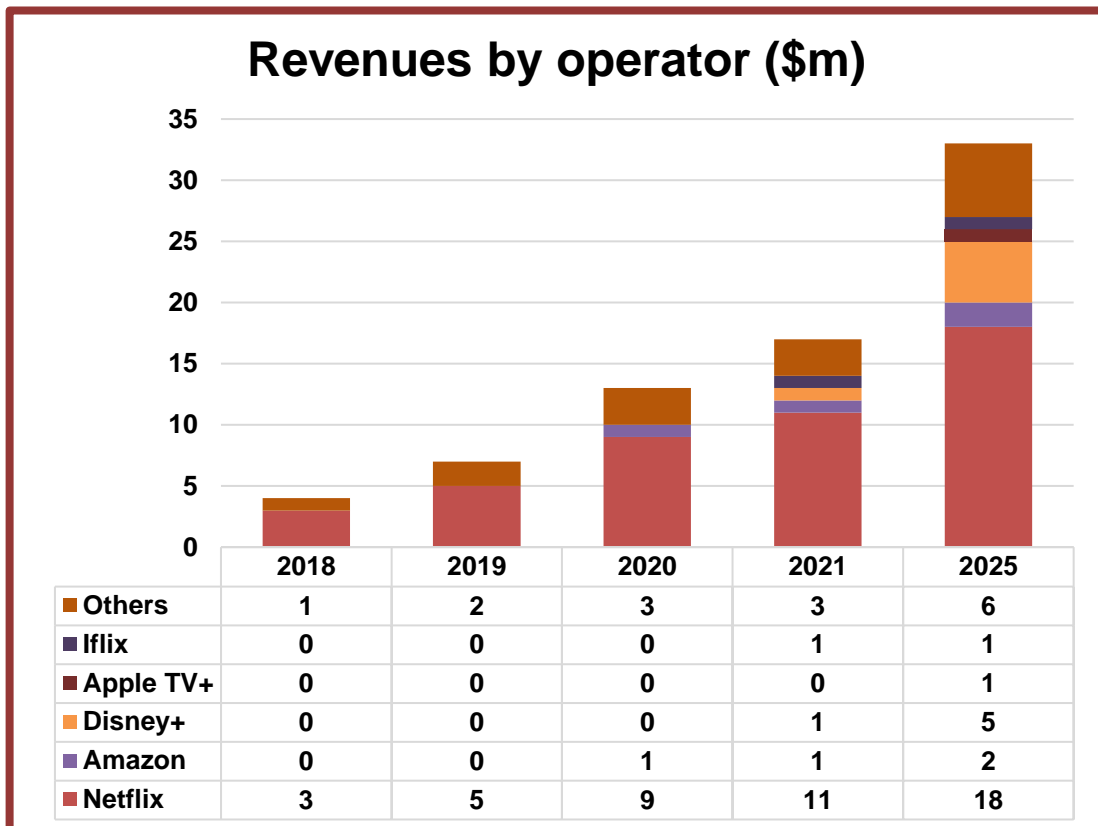
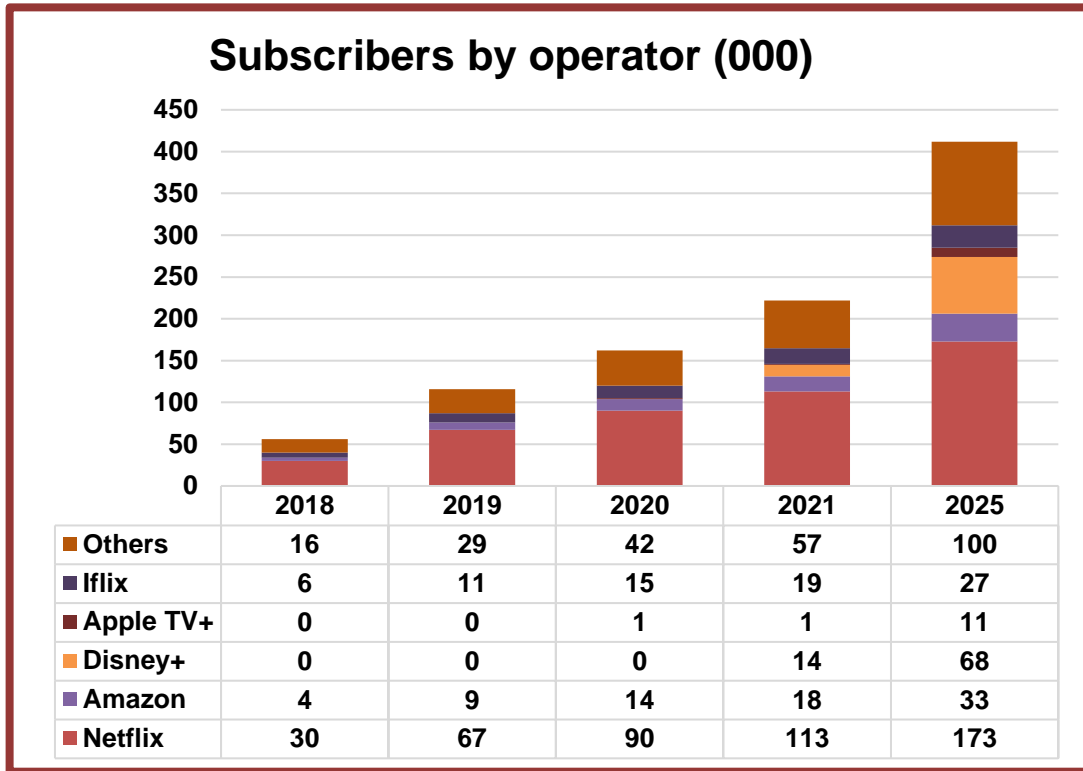
Sri Lanka OTT TV & video forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
SVOD ARPU by operator (\$)																
Netflix																
Amazon Prime																
Disney+																
Apple TV+																
iFlix																
AVOD revenues by platform (\$ million)																
YouTube																
Facebook/Instagram																
Other social media sites																
FTA broadcasters																
Pay TV broadcasters																
AVOD platforms																
Other																
<i>Source: Digital TV Research. Revenues from professionally-made TV shows and movies - so not, for example, sports or UGC.</i>																

Sri Lanka OTT TV & video outlook



Sri Lanka OTT TV & video outlook



Digital TV Research publication schedule

Title	Publication	Price
2020		
<u>Asia Pacific OTT TV and Video Forecasts</u>	March	£1200/€1320/\$1440
<u>Asia Pacific Pay TV Forecasts</u>	March	£1200/€1320/\$1440
<u>Latin America OTT TV and Video Forecasts</u>	March	£1200/€1320/\$1440
<u>Latin America Pay TV Forecasts</u>	March	£1200/€1320/\$1440
<u>North America OTT TV and Video Forecasts</u>	March	£600/€660/\$720
<u>North America Pay TV Forecasts</u>	February	£600/€660/\$720
<u>SVOD Platform Forecasts</u>	February	£800/€880/\$960
<u>Africa Pay TV Forecasts</u>	January	£1200/€1320/\$1440
<u>Africa OTT TV and Video Forecasts</u>	January	£1200/€1320/\$1440
<u>Middle East & North Africa Pay TV Forecasts</u>	January	£1200/€1320/\$1440
<u>Middle East & North Africa OTT TV and Video Forecasts</u>	January	£1200/€1320/\$1440
2019		
<u>Pay TV Forecasts Update</u>	September	£1000/€1200/\$1300
<u>SVOD Forecasts Update</u>	September	£1000/€1200/\$1300
<u>OTT TV and Video Databook</u>	September	£750/€900/\$975
<u>SVOD Databook</u>	September	£750/€900/\$975
<u>Pay TV Databook</u>	September	£750/€900/\$975
<u>Global OTT TV & Video Forecasts</u>	June	£1800/€2160/\$2340
<u>Global SVOD Forecasts</u>	June	£1500/€1800/\$1950
<u>Global Pay TV Subscriber Forecasts</u>	June	£1500/€1800/\$1950
<u>Global Pay TV Revenue Forecasts</u>	June	£1500/€1800/\$1950
<u>Global Pay TV Operator Forecasts</u>	June	£1500/€1800/\$1950
<u>Global AVOD Forecasts</u>	June	£750/€900/\$975
<u>Western Europe Pay TV Forecasts</u>	June	£1000/€1200/\$1300
<u>Western Europe OTT TV and Video Forecasts</u>	June	£1000/€1200/\$1300
<u>Eastern Europe Pay TV Forecasts</u>	May	£1000/€1200/\$1300
<u>Eastern Europe OTT TV and Video Forecasts</u>	May	£1000/€1200/\$1300

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