

# [Asia Pacific Pay TV Forecasts](#)

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Published in March 2017, this 194-page PDF and excel report combines two of last year's reports: [Digital TV Asia Pacific Forecasts](#) and the [Asia Pacific Pay TV Operator Forecasts](#) in one convenient place. The report comes in five parts:

- Executive summary and regional forecasts, with handy comparison tables to reveal the best growth prospects;
- Major pay TV operators, including market share for each;
- Regional forecasts summary from 2010 to 2022 by platform, by household penetration, by pay TV subscribers and by pay TV revenues;
- Country profiles for 23 territories;
- Detailed country forecasts for 22 countries, including 75 pay TV operators and 98 platforms.

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



## Forecasts for the following 25 countries and 65 platforms:

| Country     | Forecasts | No of ops | Platform forecasts   |
|-------------|-----------|-----------|--|
| Australia   | *         | 1         | Foxtel   |
| Bangladesh  | *         | 1         | RealVU   |
| Brunei      |           |           |  |
| Cambodia    | *         | 3         | CDN; One TV; Supernet  |
| China       | *         | 4         | China Radio & TV; China Telecom; BesTV; China Unicom   |
| Hong Kong   | *         | 2         | i-cable; Now TV  |
| India       | *         | 11        | Hathway; Siti; In Digital; DEN; Dish TV; Tata Sky; Videocon; Airtel; Sun Direct; Reliance; MTNL    |
| Indonesia   | *         | 10        | Linknet; Transvision; Indovision; Top TV; Okevision; Orange TV; Big TV; K Vision; Telkom; NexMedia |
| Japan       | *         | 3         | SkyPerfectTV; J:Com; NTT   |
| Laos        | *         |           |  |
| Malaysia    | *         | 2         | Astro; TM  |
| Mongolia    | *         | 2         | Univision; DDish   |
| Myanmar     | *         | 2         | SkyNet; 4TV/MRTV (Forever)   |
| Nepal       | *         | 1         | Dish Media   |
| New Zealand | *         | 2         | Sky; Vodafone  |
| Pakistan    | *         | 1         | PTCL   |
| Philippines | *         | 2         | Sky Cable/Sky Direct; Signal   |
| Singapore   | *         | 2         | StarHub; SingTel TV  |
| S Korea     | *         | 9         | CJ Hellovision; T Broad; D'Live; CMB; Hyundai HCN; KT Olleh; Skylife; B TV; LG U+                  |
| Sri Lanka   | *         | 2         | Dialog; Peo  |
| Taiwan      | *         | 4         | Taiwan Broadband; TWM; CNS; CHT  |
| Thailand    | *         | 2         | Truevisions; TOT   |
| Vietnam     | *         | 9         | SCTV; VTVcab; HTV-CMS; VNPT; Viettel; FPT; K+; AVG satellite; AVG DTT                              |

# SAMPLE: Indonesia pay TV briefing

- After years of sluggish growth, Indonesian multichannel TV is finally taking off. **Digital TV penetration** was [redacted] million) expected by 2022. DTT will account for [redacted] end-2016.
- **Pay TV penetration** reached only [redacted] million in 2022. However, the number of paying IPTV homes will overtake pay satellite subs in 2017.

| Main assumptions behind the forecasts |            |
|---------------------------------------|------------|
| [redacted]                            | [redacted] |
| [redacted]                            | [redacted] |
| [redacted]                            | [redacted] |
| [redacted]                            | [redacted] |
| [redacted]                            | [redacted] |
| [redacted]                            | [redacted] |
| [redacted]                            | [redacted] |
| [redacted]                            | [redacted] |
| [redacted]                            | [redacted] |
| [redacted]                            | [redacted] |
| [redacted]                            | [redacted] |
| [redacted]                            | [redacted] |
| [redacted]                            | [redacted] |
| [redacted]                            | [redacted] |

*Source: Digital TV Research*

- **Pay TV revenues** will surge from \$ [redacted] [redacted] between 2016 and 2022.
- Despite its huge potential, **Indonesian pay TV will remain underdeveloped** during the forecast period. Pay TV penetration is low, partly due to the multitude of FTA terrestrial channels on offer and partly due to the low disposable income for most homes.
- **Piracy** remains a major problem, with 2-3 million homes receiving illegal signals from as many as 2,500 operators (charging as little as a tenth of the average fee from the legitimate operators). MNC claimed 4 million homes receiving pirate signals by end-2014.
- **MNC Skyvision** (also known as MSky and trading as Indovision, Okevision and Top TV) had 2.43 million satellite TV subs by end-2015; down by 3.8% year-on-year. We forecast a total of [redacted] by 2022.

| MNC Skyvision subscriber growth (000) |          |       |            |        |           |
|---------------------------------------|----------|-------|------------|--------|-----------|
|                                       | ARPU IDR | Total | Indovision | Top TV | Okevision |
| 2010                                  | 143,845  | 804   | 631        | 173    | 0         |
| 2011                                  | 125,430  | 1,163 | 752        | 335    | 76        |
| 2012                                  | 123,203  | 1,720 | 933        | 583    | 204       |
| 2013                                  | 114,259  | 2,300 | 1,175      | 774    | 351       |
| 2014                                  | 101,247  | 2,529 | 1,289      | 838    | 402       |
| 2015                                  | 102,946  | 2,433 | 1,139      | 881    | 412       |

Source: MNC Skyvision

- MNC Skyvision raised IDR2.15 billion (\$160 million) via an IPO in July 2012, which involved the sale of 20% of its equity. **Global Mediacom** controls 79.52% of Sky Vision Network (the holding company for its pay TV, digital and broadband assets) and also owns several major FTA broadcasters such as RCTI, MNC and Global TV. MNC Kabel Mediakom is a fledgling FTTH network.
- **Transvision (formerly called TelkomVision and formerly trading as Yes TV)** had about 879,000 satellite TV (mainly pre-paid) and cable TV subscribers at end-2014. We estimate [REDACTED] by 2022.
- In June 2013, CT Corp, owned by billionaire Chairul Tanjung and through its Transmedia subsidiary, acquired an 80% stake in TelkomVision from Telkom.
- The Diamond pack costs IDR399,000/month (\$29.79) for 111 channels, with the 73-channel Gold pack at IDR199,000 (\$14.86) and 106-channel Platinum for IDR299,000/month (\$22.33).
- In October 2011, Mega Media (controlled by the Sinar Mas Group) launched the **Orange TV** satellite platform, with up to 75 channels (IDR150,000-238,000/month). Using Irdeto conditional access, Orange offers both prepaid and postpaid subscriptions. The company targets middle to lower income subscribers. Orange launched an OTT mobile service in late 2013. We forecast [REDACTED] subscribers by 2022.
- IMTV started its satellite TV operation, **BigTV**, in September 2013 – aiming to attract the growing middle class with 69-104 channels (including 36 HD) for INR120,000-500,000/month (\$8.96-37.33). IMTV, Indonesia Media Televisi, is a subsidiary of the Lippo Group, which also owns First Media. We expect [REDACTED] by 2022.
- There are 20 licensed satellite TV operators. Aora Satellite TV and Skynindo are among the **smaller satellite platforms**. Launched in December 2010, Aora Satellite TV went bust in late 2015, followed by Viva Plus. Owned by Kompas Gramedia Group, K-Vision launched a prepaid platform in March 2014.

- Premium channels **beIN Sports** hold the European Champions League soccer rights from 2015/16 to 2017/18 as well as action from Europe's top domestic leagues from England, France, Italy and Spain. beIN Sports is carried by Orange, Nexvision, Indovision, K-Vision, Usee and Transvision.
- Philippines-based ABS and Sarana Media Vision launched a 50-channel FTA satellite TV platform called **FreeViewSat** in early 2017. SMV holds a satellite TV license.

| <b>LinkNet operating data (000)</b> |             |             |             |             |             |
|-------------------------------------|-------------|-------------|-------------|-------------|-------------|
|                                     | <b>2012</b> | <b>2013</b> | <b>2014</b> | <b>2015</b> | <b>3Q16</b> |
| <b>Homes passed</b>                 | 933         | 1,194       | 1,433       | 1,673       | 1,790       |
| <b>TV subs</b>                      | 266         | 304         | 363         | 433         | 489         |
| <b>Broadband subs</b>               | 290         | 333         | 392         | 457         | 506         |
| <b>Cable TV ARPU IDR00</b>          | 150         | 151         | 186         |             |             |

*Source: LinkNet*

- **LinkNet, trading as HomeCable**, passed 1.79 million premises by September 2016 and wants to achieve more than 2 million by end-2017. The company recorded 489,000 cable TV and 506,000 broadband subs by September 2016. About 95% of customers take both TV and broadband services. We forecast **905,000 TV subs** by 2022.
- As well as broadband, HomeCable offers up to 103-173 channels for IDR165,000-315,000/month (\$12.32-23.52). LinkNet is constructing an ADSL and fiber network. LinkNet launched an IPO in mid-2014 for a third of its equity. Lippo Group-owned First Media controls 33.82%, with Asia Link Dewa taking 33.45%.
- The government aims to increase **broadband premises passed** from 30% of households (20 million) by end-2015 to 40% (25 million) by 2018 and more than 50% (35 million) in 2025. Telkom will construct the **national broadband network**, called True Broadband, at a cost of \$24 billion. Speeds range from 20Mbps to 100Mbps. The ITU estimated 2.79 million fixed broadband subscribers by end-2015.
- About 52.55% owned by the government, **Telkom** had 4.31 million fixed broadband subscribers (up to 100Mbps) by September 2016. The company had passed more than 10 million premises with fiber by mid-2016. Telkom also had 164 million mobile subs by September 2016.
- Launched in late 2014, Telkom had 1.1 million triple-play subs (IndiHome) by end-2015 and 1.52 million by September 2016. Standalone TV services are not available.
- IndiHome provides 92 SD channels and 19 HD ones as part of its triple-play fiber packs. IndiHome also gives access to Catchplay, Viu and Iflix. Its IPTV network (confusingly called Usee TV Cable) incorporates on-demand services such as HBO. We expect **██████████ TV subs** by 2022.

- National **analog terrestrial switch-off** is scheduled for early 2018, although only DVB-T trials have taken place so far and we do not believe that this target will be met – in fact we do not believe that this will happen until 2022. The Ministry of Communications and Information announced the adoption of the DVB-T2 standard in February 2012. The government has allocated IDR300 billion for 1 million settop boxes, which will be distributed to poorer households.
- Sister company of MNC Skyvision, **Media Nusantara Citra** is constructing a DTT network. Running the MNCTV, RCTI, iNewsTV and Global TV terrestrial FTA channels, MNC also operates 23 pay TV channels. **Viva Group**, owner of the tvOne and ANTV channels, also holds a DTT multiplex license (covering Java).
- Launched in November 2011, **Nexmedia**, a division of the Emtek Group which also runs FTA channels SCTV and IVM/Indosiar, began as a pay DTT operator (DVB-T2) in the Greater Jakarta area, with expansion soon after to east Java. Nexmedia (also known as Mediatama Anugrah Citra) had 124,000 subscribers by end-2014, up from 80,000 at end-2013 and 43,000 a year earlier. We forecast ████████ subs by 2022.
- The basic NexFamily package costs IDR99,000/month (\$7.39) for 26 channels, with the 18-channel NexSports at the same price. NexSports and NexFamily together cost IDR170,000/month (\$12.69) for 32 channels. Nexmedia also carries beIN Sports.
- The International Monetary Fund forecasts that Indonesia's **Gross Domestic Product** will grow above the regional average for the next five years. GDP per capita was \$3,636 in 2016. Indonesia's population was 259 million in 2016.
- Joko Widodo was elected as president in July 2014 in a closely fought election. Widodo, known as Jokowi, is not part of the dynasty that has ruled Indonesia since independence. Appealing to ordinary Indonesians, he aims to deal with the widespread corruption.



## Indonesia pay TV forecasts

|   | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|------|------|------|------|------|------|------|------|------|------|------|------|------|
| Total households (000)                      |      |      |      |      |      |      |      |      |      |      |      |      |      |
| TV households (000)                         |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Digital cable subs (000)                    |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Analog cable subs (000)                     |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Pay IPTV subscribers (000)                  |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Pay digital Satellite TV subs (000)         |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Digital free Satellite TV hholds (000)      |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Analog Satellite TV Hholds (000)            |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Analog terrestrial households (000)         |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Primary FTA DTT households (000)            |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Primary Pay DTT households (000)            |      |      |      |      |      |      |      |      |      |      |      |      |      |
|   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Digital homes (000)                         |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Analog homes (000)                          |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Pay TV subscribers (000)                    |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Total DTT households (000)                  |      |      |      |      |      |      |      |      |      |      |      |      |      |
|   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Digital cable subs/TV HH                    |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Analog cable subs/TV HH                     |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Pay IPTV subs/TV HH                         |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Pay Satellite TV/TV HH                      |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Digital free Satellite TV/TV HH             |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Analog Satellite TV/TV HH                   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Analog terrestrial/TVHH                     |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Primary FTA DTT/TV HH                       |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Primary pay DTT/TV HH                       |      |      |      |      |      |      |      |      |      |      |      |      |      |
|   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| TVHH/Total HH                               |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Digital/TV HH                               |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Analog/TV HH                                |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Pay TV Subs/TV HH                           |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Total DTT/TV HH                             |      |      |      |      |      |      |      |      |      |      |      |      |      |
|   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Stand-alone digital cable subs (000)</i> |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Dual-play digital cable subs (000)</i>   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Triple-play digital cable subs (000)</i> |      |      |      |      |      |      |      |      |      |      |      |      |      |
|   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Stand-alone pay IPTV subs (000)</i>      |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Dual-play pay IPTV subs (000)</i>        |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Triple-play pay IPTV subs (000)</i>      |      |      |      |      |      |      |      |      |      |      |      |      |      |
|   |      |      |      |      |      |      |      |      |      |      |      |      |      |



## Indonesia pay TV forecasts

|   | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|------|------|------|------|------|------|------|------|------|------|------|------|------|
| <b>Revenues (US\$ million)</b>                |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Stand-alone digital cable revs</i>         |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Dual-play digital cable TV revenues</i>    |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Triple-play digital cable TV revs</i>      |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Digital cable TV subs revenues                |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Digital cable TV on-demand revs               |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Digital cable TV revenues                     |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Analog cable TV subs revs                     |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Cable TV revenues                             |      |      |      |      |      |      |      |      |      |      |      |      |      |
|   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Stand-alone IPTV revenues</i>              |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Dual-play IPTV revenues</i>                |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Triple-play IPTV revenues</i>              |      |      |      |      |      |      |      |      |      |      |      |      |      |
| IPTV subscription revenues                    |      |      |      |      |      |      |      |      |      |      |      |      |      |
| IPTV on-demand revenues                       |      |      |      |      |      |      |      |      |      |      |      |      |      |
| IPTV revenues                                 |      |      |      |      |      |      |      |      |      |      |      |      |      |
|   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Satellite TV subscription revenues            |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Satellite TV on-demand revenues               |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Satellite TV revenues                         |      |      |      |      |      |      |      |      |      |      |      |      |      |
|   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| DTT subscription revs                         |      |      |      |      |      |      |      |      |      |      |      |      |      |
| DTT on-demand revenues                        |      |      |      |      |      |      |      |      |      |      |      |      |      |
| DTT revenues                                  |      |      |      |      |      |      |      |      |      |      |      |      |      |
|   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Subscription revenues                         |      |      |      |      |      |      |      |      |      |      |      |      |      |
| On-demand revenues                            |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Total revenues                                |      |      |      |      |      |      |      |      |      |      |      |      |      |
|   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <b>Average Revenue Per User (ARPU - US\$)</b> |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Stand-alone digital cable subs</i>         |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Dual-play digital cable TV subs</i>        |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Triple-play digital cable TV subs</i>      |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Average digital cable (subs & VOD)            |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Analog cable TV subs                          |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Stand-alone IPTV subs</i>                  |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Dual-play IPTV subs</i>                    |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Triple-play IPTV subs</i>                  |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Average IPTV (subs and VOD)                   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Pay Satellite TV (subs)                       |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Pay Satellite TV (subs and PPV)               |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Pay DTT (subs)                                |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Pay DTT (subs and PPV)                        |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Average monthly ARPU                          |      |      |      |      |      |      |      |      |      |      |      |      |      |





## Indonesia pay TV forecasts

|   | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|------|------|------|------|------|------|------|------|------|------|------|------|------|
| <b>Pay TV subscribers by operator (000)</b> |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Linknet (digital cable)                     |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (digital cable)                 |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (satellite)                     |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (total)                         |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Indovision (satellite)                      |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Top TV (satellite)                          |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Okevision (satellite)                       |      |      |      |      |      |      |      |      |      |      |      |      |      |
| MNC Skyvision (total)                       |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Orange TV (satellite)                       |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Big TV (satellite)                          |      |      |      |      |      |      |      |      |      |      |      |      |      |
| K Vision (satellite)                        |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Telkom (IPTV)                               |      |      |      |      |      |      |      |      |      |      |      |      |      |
| NexMedia (DTT)                              |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Others                                      |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <b>Share of pay TV subs by operator %</b>   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Linknet (digital cable)                     |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (digital cable)                 |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (satellite)                     |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (total)                         |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Indovision (satellite)                      |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Top TV (satellite)                          |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Okevision (satellite)                       |      |      |      |      |      |      |      |      |      |      |      |      |      |
| MNC Skyvision (total)                       |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Orange TV (satellite)                       |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Big TV (satellite)                          |      |      |      |      |      |      |      |      |      |      |      |      |      |
| K Vision (satellite)                        |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Telkom (IPTV)                               |      |      |      |      |      |      |      |      |      |      |      |      |      |
| NexMedia (DTT)                              |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Others                                      |      |      |      |      |      |      |      |      |      |      |      |      |      |



## Indonesia pay TV forecasts

|   | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|------|------|------|------|------|------|------|------|------|------|------|------|------|
| <b>Subscription &amp; VOD revenues (US\$ million)</b> |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Linknet (digital cable)                               |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (digital cable)                           |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (satellite)                               |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (total)                                   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Indovision (satellite)                                |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Top TV (satellite)                                    |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Okevision (satellite)                                 |      |      |      |      |      |      |      |      |      |      |      |      |      |
| MNC Skyvision (total)                                 |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Orange TV (satellite)                                 |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Big TV (satellite)                                    |      |      |      |      |      |      |      |      |      |      |      |      |      |
| K Vision (satellite)                                  |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Telkom (IPTV)   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| NexMedia (DTT)  |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Others  |      |      |      |      |      |      |      |      |      |      |      |      |      |
|   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <b>Share of pay TV revenues by operator %</b>         |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Linknet (digital cable)                               |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (digital cable)                           |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (satellite)                               |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (total)                                   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Indovision (satellite)                                |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Top TV (satellite)                                    |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Okevision (satellite)                                 |      |      |      |      |      |      |      |      |      |      |      |      |      |
| MNC Skyvision (total)                                 |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Orange TV (satellite)                                 |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Big TV (satellite)                                    |      |      |      |      |      |      |      |      |      |      |      |      |      |
| K Vision (satellite)                                  |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Telkom (IPTV)   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| NexMedia (DTT)  |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Others  |      |      |      |      |      |      |      |      |      |      |      |      |      |
|   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <b>Average Revenue Per User (ARPU - US\$)</b>         |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Linknet (digital cable)                               |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (digital cable)                           |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Transvision (satellite)                               |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Indovision (satellite)                                |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Top TV (satellite)                                    |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Okevision (satellite)                                 |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Orange TV (satellite)                                 |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Big TV (satellite)                                    |      |      |      |      |      |      |      |      |      |      |      |      |      |
| K Vision (satellite)                                  |      |      |      |      |      |      |      |      |      |      |      |      |      |
| Telkom (IPTV)   |      |      |      |      |      |      |      |      |      |      |      |      |      |
| NexMedia (DTT)  |      |      |      |      |      |      |      |      |      |      |      |      |      |
| <i>Source: digital TV research</i>                    |      |      |      |      |      |      |      |      |      |      |      |      |      |



## Digital TV Research publication schedule for 2017

|    | <b>Title</b>  | <b>Publication</b> | <b>Price</b>       |
|----|---|--------------------|--------------------|
| 1  | <a href="#">Sub-Saharan Africa Pay TV Forecasts</a>             | January            | £1200/€1440/\$1560 |
| 2  | <a href="#">Middle East &amp; North Africa Pay TV Forecasts</a> | February           | £1200/€1440/\$1560 |
| 3  | <a href="#">Asia Pacific Pay TV Forecasts</a>                   | March              | £1200/€1440/\$1560 |
| 4  | Latin America Pay TV Forecasts                                  | March              | £1200/€1440/\$1560 |
| 5  | North America Pay TV Forecasts                                  | April              | £750/€900/\$975    |
| 6  | Eastern Europe Pay TV Forecasts                                 | April              | £1200/€1440/\$1560 |
| 7  | Western Europe Pay TV Forecasts                                 | May                | £1200/€1440/\$1560 |
| 8  | Global Pay TV Subscriber Forecasts                              | May                | £1800/€2160/\$2340 |
| 9  | Global Pay TV Revenue Forecasts                                 | June               | £1800/€2160/\$2340 |
| 10 | Global Pay TV Operator Forecasts                                | June               | £1800/€2160/\$2340 |
| 11 | Global Pay TV Databook  | July               | £1000/€1200/\$1300 |
| 12 | Sub-Saharan Africa OTT TV & Video Forecasts                     | August             | £1200/€1440/\$1560 |
| 13 | Middle East & North Africa OTT TV & Video Forecasts             | August             | £1200/€1440/\$1560 |
| 14 | Asia Pacific OTT TV & Video Forecasts                           | September          | £1200/€1440/\$1560 |
| 15 | Latin America OTT TV & Video Forecasts                          | September          | £1200/€1440/\$1560 |
| 16 | North America OTT TV & Video Forecasts                          | October            | £750/€900/\$975    |
| 17 | Eastern Europe OTT TV & Video Forecasts                         | October            | £1200/€1440/\$1560 |
| 18 | Western Europe OTT TV & Video Forecasts                         | November           | £1200/€1440/\$1560 |
| 19 | Global OTT TV & Video Forecasts                                 | November           | £1800/€2160/\$2340 |
| 20 | Global SVOD Forecasts   | December           | £1800/€2160/\$2340 |

Please note that the regional Pay TV reports (1-7 above) contain the content from last year's Digital TV series and the Pay TV Operator series – so two reports in one for 2017. Likewise, the regional OTT reports (12-18 above) contain the content from 2016's OTT series as well as the content from 2016's SVOD series.

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| Title   | Publication Date | Price              |
|---|------------------|--------------------|
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| <a href="#">Digital TV North America Forecasts</a>                    | March            | £500/\$750/€625    |
| <a href="#">Digital TV Eastern Europe Forecasts</a>                   | April            | £900/\$1350/€1125  |
| <a href="#">Digital TV Western Europe Forecasts</a>                   | April            | £900/\$1350/€1125  |
| <a href="#">Digital TV World Household Forecasts</a>                  | April            | £1300/\$1950/€1625 |
| <a href="#">Digital TV World Revenue Forecasts</a>                    | May              | £1300/\$1950/€1625 |
| <a href="#">Digital TV World Databook</a>                             | May              | £800/\$1200/€1000  |
| <a href="#">Middle East &amp; Africa OTT TV &amp; Video Forecasts</a> | May              | £900/\$1350/€1125  |
| <a href="#">Asia Pacific OTT TV &amp; Video Forecasts</a>             | June             | £900/\$1350/€1125  |
| <a href="#">Latin America OTT TV &amp; Video Forecasts</a>            | June             | £900/\$1350/€1125  |
| <a href="#">North America OTT TV &amp; Video Forecasts</a>            | June             | £500/\$750/€625    |
| <a href="#">Eastern Europe OTT TV &amp; Video Forecasts</a>           | July             | £900/\$1350/€1125  |
| <a href="#">Western Europe OTT TV &amp; Video Forecasts</a>           | July             | £900/\$1350/€1125  |
| <a href="#">Global OTT TV &amp; Video Forecasts</a>                   | July             | £1500/\$2250/€1875 |
| <a href="#">Latin America Pay TV Operator Forecasts</a>               | August           | £900/\$1350/€1125  |
| <a href="#">North America Pay TV Operator Forecasts</a>               | September        | £500/\$750/€625    |
| <a href="#">Eastern Europe Pay TV Operator Forecasts</a>              | September        | £900/\$1350/€1125  |
| <a href="#">Western Europe Pay TV Operator Forecasts</a>              | September        | £900/\$1350/€1125  |
| <a href="#">Global Pay TV Operator Forecasts</a>                      | October          | £1500/\$2250/€1875 |
| <a href="#">Middle East &amp; Africa SVOD Forecasts</a>               | October          | £900/\$1350/€1125  |
| <a href="#">Asia Pacific SVOD Forecasts</a>                           | October          | £900/\$1350/€1125  |
| <a href="#">Latin America SVOD Forecasts</a>                          | November         | £900/\$1350/€1125  |
| <a href="#">North America SVOD Forecasts</a>                          | November         | £500/\$750/€625    |
| <a href="#">Eastern Europe SVOD Forecasts</a>                         | November         | £900/\$1350/€1125  |
| <a href="#">Western Europe SVOD Forecasts</a>                         | December         | £900/\$1350/€1125  |
| <a href="#">Global SVOD Forecasts</a>                                 | December         | £1500/\$2250/€1875 |

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