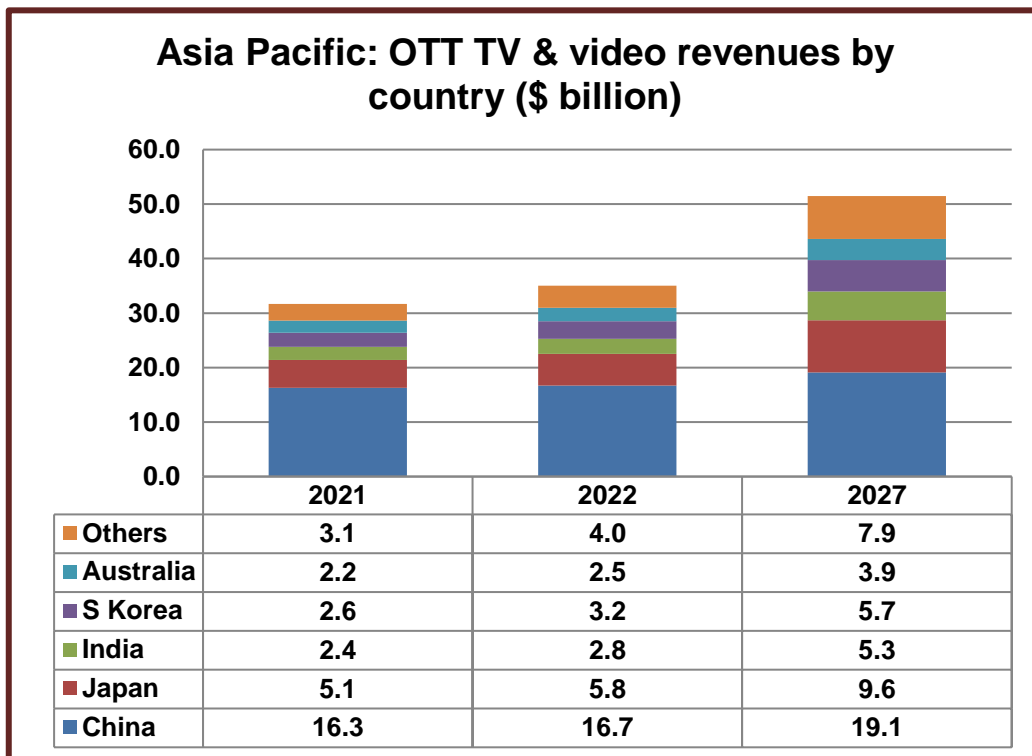


## Asia Pacific OTT revenues to climb by \$20 billion

OTT TV episodes and movies revenues for 22 Asia Pacific countries will reach \$52 billion in 2027; up by 62% from the \$32 billion recorded in 2021. From the \$20 billion additional revenues, China will add \$3 billion, India \$3 billion, South Korea \$3 billion and Japan \$5 billion. Indian revenues will more than double.



Much of the growth will go ahead outside China. The Chinese government's clampdown on fan-based culture hit reality productions hard, resulting in SVOD subscriber growth deceleration.

Market leader Tencent Video yesterday reported only a 1% increase in SVOD subscriptions for 2021. The situation was worse for second-placed iQiyi, which lost 6 million subscribers in 2021 to take its total to 96.4 million.

Simon Murray, Principal Analyst at Digital TV Research, said: "Can one country make that much difference? China was responsible for 37% of Asia Pacific's OTT revenues in 2021. Luckily, there is plenty of growth elsewhere."

Asia Pacific SVOD revenues will reach \$28 billion by 2027, up from \$18 billion in 2021. AVOD will grow by \$8 billion to \$19 billion by 2027.

# Asia Pacific OTT TV & Video Forecasts

## Table of Contents

Published in March 2022, 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 52-page PowerPoint document full of charts, graphs and bullet points;
- Insight: Detailed country-by-country analysis in a 103-page PDF document.
- Excel workbook covering each year from 2010 to 2027 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;

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



### Forecasts for the following 148 SVOD platforms across 22 countries:

Country	SVOD ops	SVOD Platforms
Australia	10	Netflix; Amazon Prime Video; Disney+; HBO; Paramount+; Britbox; Apple TV+; Stan; Binge; Foxtel Now
Bangladesh	4	Netflix; Amazon Prime Video; Disney+; Zee5
Cambodia	6	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Iflix
China	5	Youku Tudou; IQiyi; Tencent Video; Mango; Bilibili
Hong Kong	7	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; MyTV Super; Viu
India	9	Netflix; Amazon Prime Video; Disney+ Hotstar; HBO; Apple TV+; Zee5; Sony Liv; ALT Balaji; Eros Now
Indonesia	8	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Iflix; Vidio; Viu
Japan	11	Netflix; Amazon Prime Video; Disney+; HBO; Parmount+; Apple TV+; Hulu; U-Next; Avex dtv; Telasa; Niconico
Laos	5	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO
Malaysia	8	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Iflix; Viu; Sooka
Mongolia	4	Netflix; Amazon Prime Video; Disney+; Apple TV+
Myanmar	4	Netflix; Amazon Prime Video; Disney+; Viu
Nepal	3	Netflix; Amazon Prime Video; Disney+
New Zealand	8	Netflix; Amazon Prime Video; Disney+; HBO; Paramount+; Apple TV+; Britbox; Neon
Pakistan	6	Netflix; Amazon Prime Video; Disney+; Iflix; StarzPlay; Zee5
Philippines	7	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Iflix; Viu
Singapore	6	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Viu
South Korea	11	Netflix; Amazon Prime Video; Disney+; HBO; Paramount+; Watcha Play; Tving; LG U+; Olleh TV; Seezn; Wavve
Sri Lanka	5	Netflix; Amazon Prime Video; Disney+; Apple TV+; Zee5
Taiwan	7	Netflix; Amazon Prime Video; Disney+; HBO; Apple TV+; Catchplay; CHT
Thailand	8	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; WeTV; Iflix; Viu; True ID
Vietnam	6	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Iflix

### AVOD forecasts for YouTube and Facebook across 22 countries and:

Country	AVOD Platforms
Australia	9Now; Ten Play; 7Plus; Samsung TV Plus
China	iQiyi; Tencent Video; Youku Tudou; Mango; Bilibili
Hong Kong	TVB; Viu
India	Disney+ Hotstar; Zee5; Sony Liv; ALT Balaji; Eros Now
Indonesia	Disney+; Iflix; Viu; Vidio; Vision+/MCN
Japan	Niconico; Tver; U-Next
Malaysia	Sooka/Astro; Disney+; Iflix; Viu/Media Prima
New Zealand	TVNZ; ThreeNow
Philippines	Disney+; Iflix; Viu
Singapore	Viu
S Korea	Tving; Seezn; Wavve; Samsung TV Plus
Sri Lanka	Zee5
Thailand	Disney+; Wetv/Iflix; Viu; Samsung TV Plus

## SAMPLE: Qatar OTT TV & video insight

OTT TV & video revenues are forecast to reach \$92 million by 2027, double from \$45 million in 2021. SVOD will contribute \$75 million in 2027, up from \$38 million in 2021. There will be 605,000 SVOD subscriptions by 2027 compared with 362,000 at end-2021. About 54% of the TV households will pay for at least one SVOD subscription by 2027.

Main assumptions behind the forecasts
• The OTT sector is competitive.
• Smartphone penetration is very high.
• Fixed broadband penetration is also high.
• Population forecasts are higher than the previous edition
• High proportion of ex-pats means strong demand for foreign content.

**Netflix** (\$7.99-14.99/month) launched in January 2016. We forecast 213,000 subscribers by 2027; up from 143,000 in 2021. Netflix is carried by Ooredoo.

**Amazon Prime Video** started operations in November 2016 as part of its global rollout. Subscriptions cost \$5.99/month, with little original or local content. We forecast 62,000 Amazon subscribers by 2027.

**Apple TV+** started in Qatar with its global rollout in November 2019, with 34,000 subscribers expected by 2027.

**HBO Max, Paramount+ and Disney+** are not expected to start in the Arabic-speaking countries due to deals with OSN.

**OSN** (briefly called Wavo. QAR35-79.50/month) launched in August 2017. As well as 27 linear channels, OSN exclusively carries Disney+ originals, Paramount+ and HBO content. We forecast 91,000 subscribers by 2027.

After a cost cutting drive, OSN now places more emphasis on its SVOD platform. OSN has exclusive deals with seven Hollywood studios. It will increase Arabic content to a quarter of the total.

Transmitting in English, Arabic and French, **StarzPlay** has 6,000 hours of Hollywood content as well as 2,000 hours of Arabic content. Discovery+ is on offer. We forecast 120,000 subscribers by 2027.

MBC's **Shahid VIP** provides linear channels as well as on-demand content. Ooredoo carries Shahid VIP. We forecast 62,000 subscribers by 2027.

**beIN Connect** provides access to 34 linear channels available on the satellite TV package as well as 2,000 on-demand TV episodes and 300 on-demand movies – free to satellite TV subs or \$18/month to others.

Hong Kong's **Viu** started operations in Bahrain, Egypt, Jordan, Kuwait, Oman, Qatar, Saudi Arabia and UAE in February 2017. With 40,000 hours on offer, local content is included as well as international fare to appeal to ex-pats.

Viu recorded 49.4 million monthly active users across 16 markets by June 2021. Viu had 7.0 million paying subscribers by June 2021, up from 5.3 million paying subscribers by end-2020, 3.6 million in 2019 and 1.4 million in 2018. Most of these subscribers are in South East Asia.

Main operators by subscribers (000)				
Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
beIN	54	-	-	beIN Connect
Ooredoo	156	-	2,660	Shahid VIP; OSN
OSN	42	-	-	OSN
Vodafone	-	5	1,800	-

**The Ooredoo TV IPTV platform** (up to 190 channels, including bundles from beIN, MBC and OSN) is part of a triple-play package (up to 1Gbps). We estimated 156,000 subscribers at end-2021. In October 2015, Ooredoo has distribution deals with SVOD platforms OSN and Shahid VIP.

Ooredoo is investing QAR1 billion on an **extensive fiber network**. Ooredoo is constructing the government-owned National Broadband Network (QNBN). Ooredoo had 2.66 million mobile subscribers by September 2021.

**Vodafone** won the license for the second fixed line service in April 2010. Vodafone sold its stake to a local consortium in late 2018. Vodafone started its Giga TV OTT platform in late 2019. Vodafone had 5,000 fixed broadband and 1.80 million mobile subscribers by September 2021.

## SAMPLE: Qatar OTT TV & video forecasts

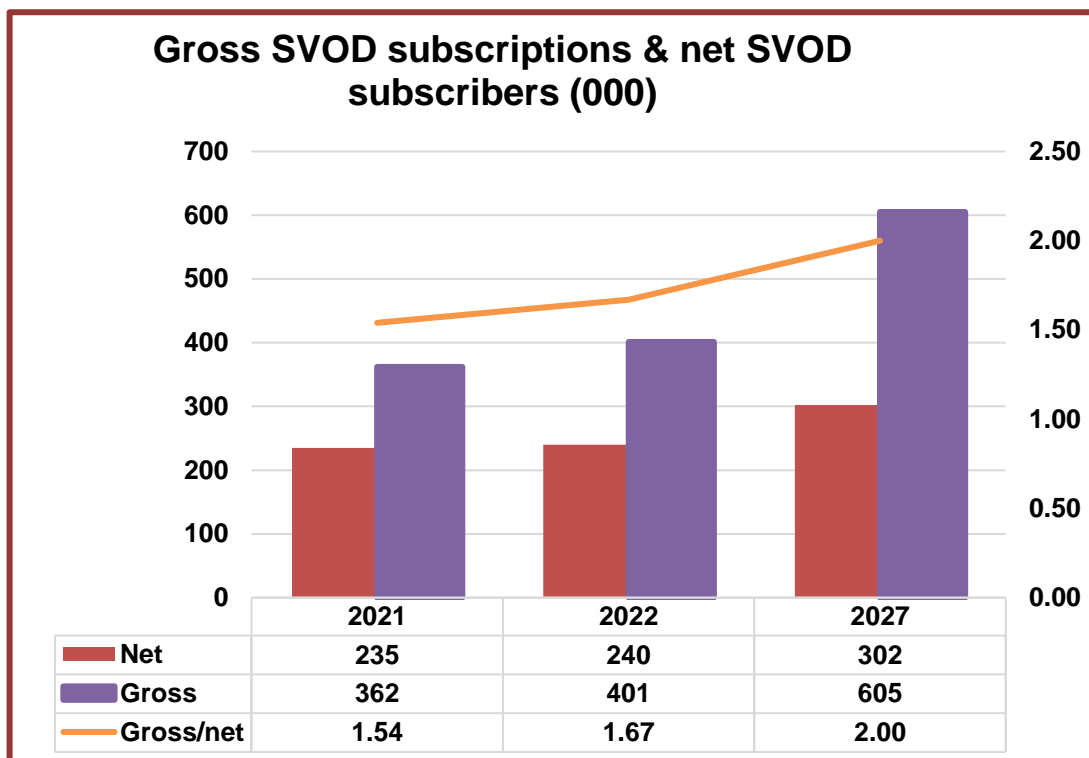
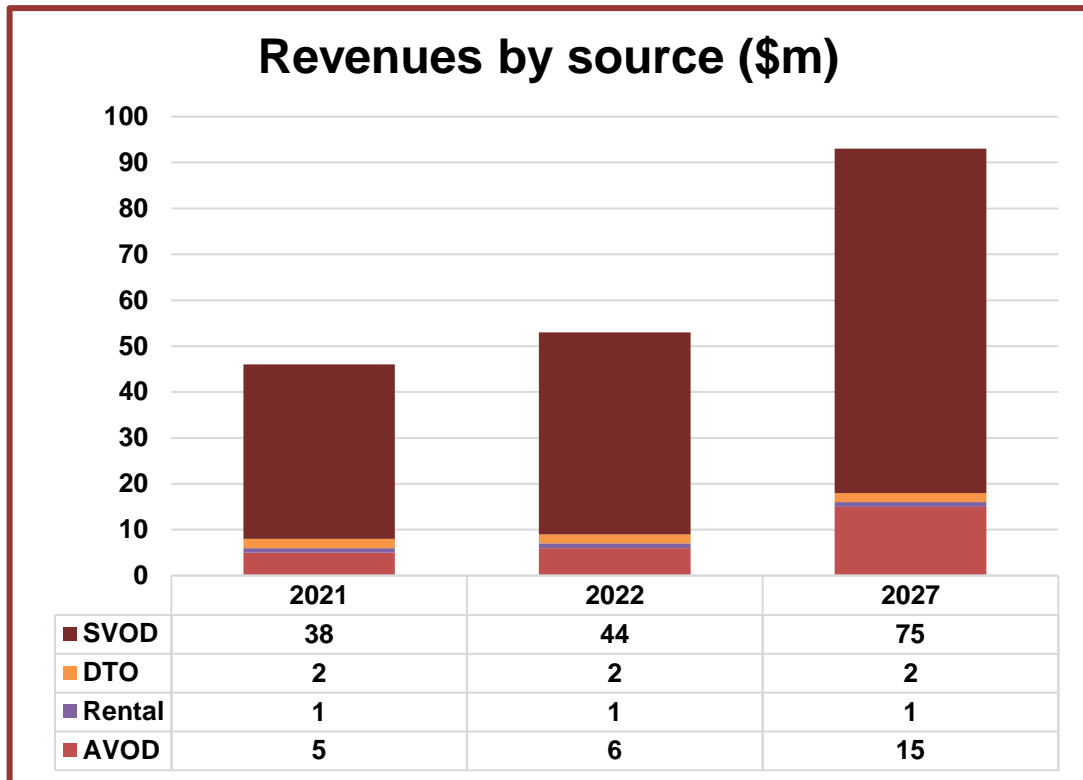
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Population (000)																		
Total households (000)																		
TV households (000)																		
Fixed broadband households (000)																		
Smartphone subs (000)																		
Tablet subscribers (000)																		
TV HH/Total HH																		
Fixed bband HH/Total HH																		
Smartphone subs/Pop																		
Tablet subs/Population																		
OTT TV & video viewers (000)																		
OTT TV & video viewers/pop																		
Online advertising (US\$ mil.)																		
AVOD (US\$ mil.)																		
Online rental revs (US\$ mil.)																		
DTO video revs (US\$ mil.)																		
SVOD revenues (US\$ mil.)																		
Total OTT TV & video revenues (US\$ mil.)																		
AVOD revenues/Pop \$																		
SVOD revenues/Pop \$																		
SVOD revenues/SVOD subscriber \$																		
Net SVOD homes (000)																		
SVOD homes/TVHH																		
SVOD homes/Fixed band HH																		
SVOD subscriptions/SVOD homes																		
Gross SVOD subscriptions (000)																		
SVOD subs/TVHH																		
SVOD subs/Fixed bband HH																		
SVOD subs/Smphone users																		
SVOD subscribers by operator (000)																		
Netflix																		
Amazon																		
Disney+																		
Apple TV+																		
StarzPlay																		
Shahid VIP																		
OSN																		
Others																		



## SAMPLE: Qatar OTT TV & video forecasts

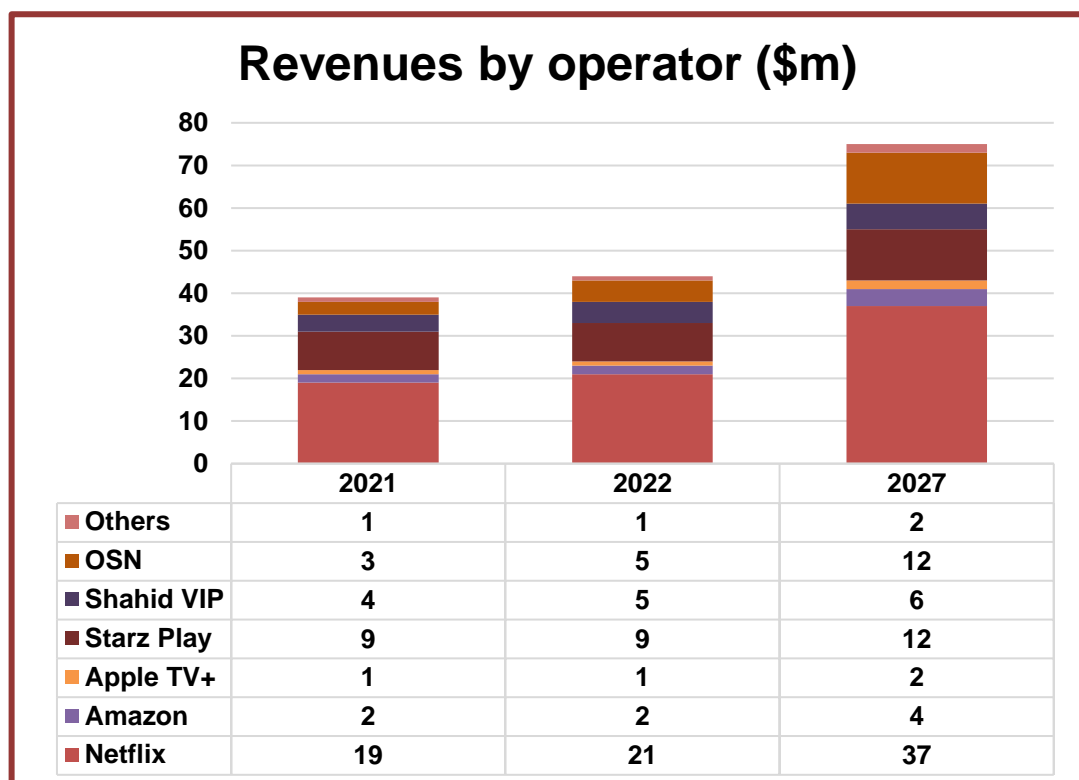
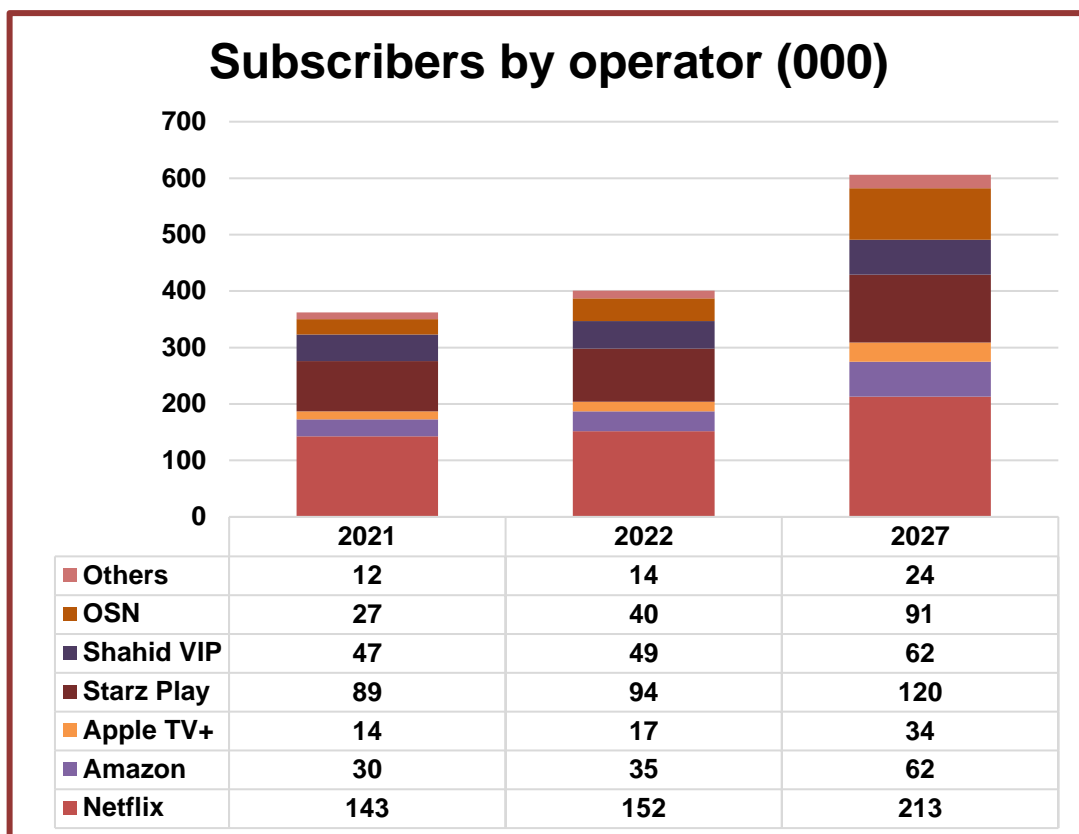
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
<b>Share of SVOD subscribers by operator (%)</b>																		
Netflix																		
Amazon																		
Disney+																		
Apple TV+																		
StarzPlay																		
Shahid VIP																		
OSN																		
Others																		
<b>SVOD revenues by operator (US\$ mil.)</b>																		
Netflix																		
Amazon																		
Disney+																		
Apple TV+																		
StarzPlay																		
Shahid VIP																		
OSN																		
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Shahid VIP																		
OSN																		
Others																		
<b>SVOD ARPU by operator (\$)</b>																		
Netflix																		
Amazon																		
Disney+																		
Apple TV+																		
StarzPlay																		
Shahid VIP																		
OSN																		
<b>AVOD revenues by platform (\$ million)</b>																		
YouTube																		
Facebook/Instagram																		
Other																		

## SAMPLE: Qatar OTT TV & video outlook





## SAMPLE: Qatar OTT TV & video outlook



## Digital TV Research report schedule for 2022

Title	Publication	Price
1 <a href="#">Africa Pay TV Forecasts</a>	January	£1400/€1600/\$1875
2 <a href="#">Middle East &amp; North Africa Pay TV Forecasts</a>	January	£1400/€1600/\$1875
3 <a href="#">SVOD Forecasts Update (based on December 2021 results)</a>	February	£1800/€2050/\$2400
4 <a href="#">Africa OTT TV and Video Forecasts</a>	February	£1400/€1600/\$1875
5 <a href="#">Middle East &amp; North Africa OTT TV and Video Forecasts</a>	February	£1400/€1600/\$1875
6 <a href="#">North America Pay TV Forecasts</a>	February	£700/€800/\$940
7 <a href="#">North America OTT TV and Video Forecasts</a>	February	£700/€800/\$940
8 <a href="#">Latin America Pay TV Forecasts</a>	March	£1400/€1600/\$1875
9 <a href="#">Latin America OTT TV and Video Forecasts</a>	March	£1400/€1600/\$1875
10 <a href="#">Asia Pacific Pay TV Forecasts</a>	March	£1400/€1600/\$1875
11 <a href="#">Asia Pacific OTT TV and Video Forecasts</a>	March	£1400/€1600/\$1875
12 <a href="#">Eastern Europe Pay TV Forecasts</a>	April	£1400/€1600/\$1875
13 <a href="#">Eastern Europe OTT TV and Video Forecasts</a>	April	£1400/€1600/\$1875
14 <a href="#">Western Europe Pay TV Forecasts</a>	May	£1400/€1600/\$1875
15 <a href="#">Western Europe OTT TV and Video Forecasts</a>	May	£1400/€1600/\$1875
16 <a href="#">Global OTT TV &amp; Video Forecasts</a>	May	£2000/€2300/\$2600
17 <a href="#">Global SVOD Forecasts (based on March 2022 results)</a>	May	£1800/€2050/\$2400
18 <a href="#">Global Pay TV Subscriber Forecasts</a>	June	£1800/€2050/\$2400
19 <a href="#">Global Pay TV Revenue Forecasts</a>	June	£1800/€2050/\$2400
20 <a href="#">Global Pay TV Operator Forecasts</a>	June	£1800/€2050/\$2400
21 <a href="#">Global AVOD Forecasts</a>	June	£1800/€2050/\$2400
22 <a href="#">SVOD Forecasts Update (based on June 2022 results)</a>	August	£1800/€2050/\$2400
23 <a href="#">Africa SVOD Forecasts</a>	August	£1200/€1380/\$1600
24 <a href="#">Middle East &amp; North Africa SVOD Forecasts</a>	August	£1200/€1380/\$1600
25 <a href="#">Asia Pacific SVOD Forecasts</a>	August	£1200/€1380/\$1600
26 <a href="#">Latin America SVOD Forecasts</a>	September	£1200/€1380/\$1600
27 <a href="#">North America SVOD Forecasts</a>	September	£600/€690/\$800
28 <a href="#">Eastern Europe SVOD Forecasts</a>	September	£1200/€1380/\$1600
29 <a href="#">Western Europe SVOD Forecasts</a>	October	£1200/€1380/\$1600
30 <a href="#">SVOD Forecasts Update (based on September 2022 results)</a>	November	£1800/€2050/\$2400
31 <a href="#">Pay TV Forecasts Update</a>	November	£2000/€2300/\$2700

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