

Evolving OTT Ecosystems: Strategy and Scale

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There is not
a market for global
streaming services

There are many

Not streaming wars

**US market tells us little
about the global market**

Global market offers scale

Revenue source

Ad support

Subscriber pay

Internet-distributed video

Open Dist/Social

YouTube
TikTok
Facebook

Izzy

No fee

FAST
FAST
FAST

Some upfront \$/add'l based on views: Mubi; Wavve? Wacha?
ChaiFlicks

Content cost

Licensed

AVOD
BVODs
Freevee

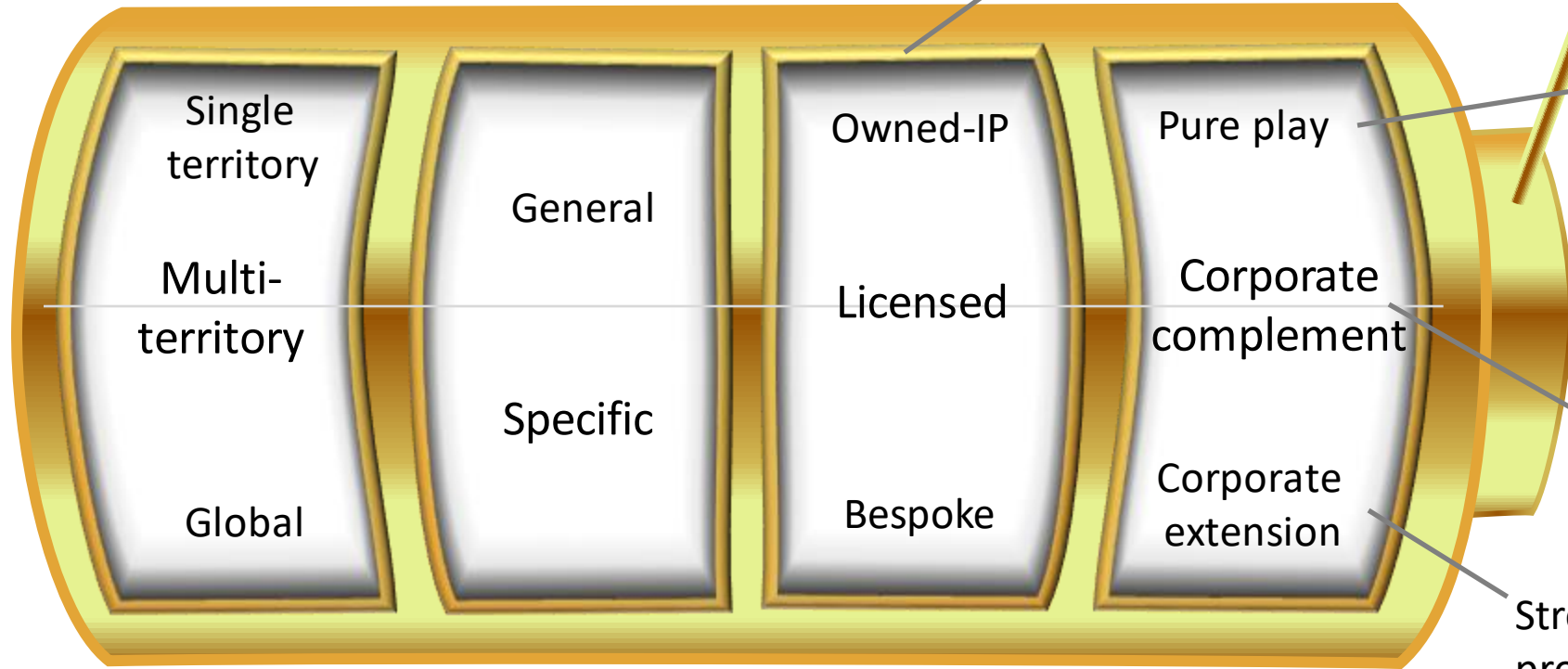
SAVOD
Disney+
Netflix?

SVOD
Netflix
Disney+
Prime Video
AppleTV+
Paramount+

Exc. China

SVOD

Structuring Characteristics



Most services blend

Provide video for payment—Netflix

Video service supports primary corp biz
Prime Video; AppleTV+

Streaming extends production/distribution biz
Dis+; Para+

Geographic Reach	Library Specificity	Library Ownership	Corporate Ownership
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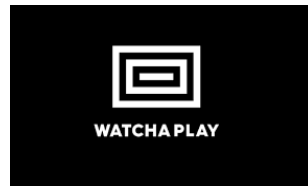
Distinguishing features

- aggregating taste cultures across national borders
- subscriber funding
- on-demand

The best way to understand
the emerging sectors is to
build snapshots of
particular national markets

16 Non US based services

10 Markets



Australia

Brazil

Canada

France

Germany

India

MENA

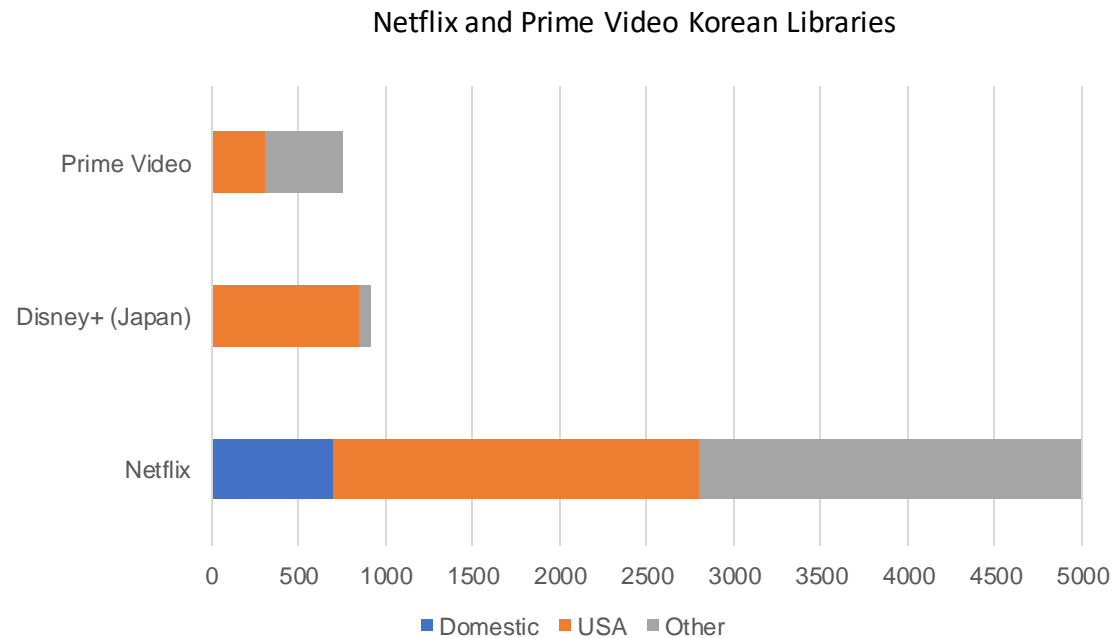
South Korea

UK

Major multi-market

Categories of adoption
(% of households/nation)
Mass – more than 50%
Significant – 10-50%
Niche – <10%

- *Global* availability
- *Mass-market* adoption in *multiple territories*
Netflix, Prime Video, Disney+



Data from Ampere Analysis; Disney+ Japan library used because our data predates Korean launch

Minor multi-market

- *Mass in one major market*
- *Niche adoption in multiple territories*

Zee5

Globoplay

Viaplay

Shahid VIP

Tencent Video/WeTV



Top 15 Countries by GDP

1. United States: \$20.89 trillion
2. China: \$14.72 trillion
3. Japan: \$5.06 trillion
4. Germany: \$3.85 trillion
5. United Kingdom: \$2.67 trillion
6. India: \$2.66 trillion
7. France: \$2.63 trillion
8. Italy: \$1.89 trillion
9. Canada: \$1.64 trillion
10. South Korea: \$1.63 trillion
11. Russia: \$1.48 trillion
12. Brazil: \$1.44 trillion
13. Australia: \$1.32 trillion
14. Spain: \$1.28 trillion
15. Indonesia: \$1.05 trillion

Top 12 by Population (within top GDP)

1. China: 1,425,887,337
2. India: 1,417,173,173
3. United States: 338,289,857
4. Indonesia: 275,501,339
5. Brazil: 215,313,498
6. Russia: 144,713,314
7. Japan: 123,951,692
8. Germany: 83,369,843
9. United Kingdom: 67,508,936
10. France: 64,626,628
11. Italy: 59,037,474
12. South Korea: 51,815,810

Minor multi-market attributes

- Wealthy and populous markets
- Strong diaspora
- Well regarded and distinctive screen product
 - India
 - Korea
- Language



Specialty

- *Multi-market* availability
- *Niche* adoption in *multiple* territories

Viu

Britbox

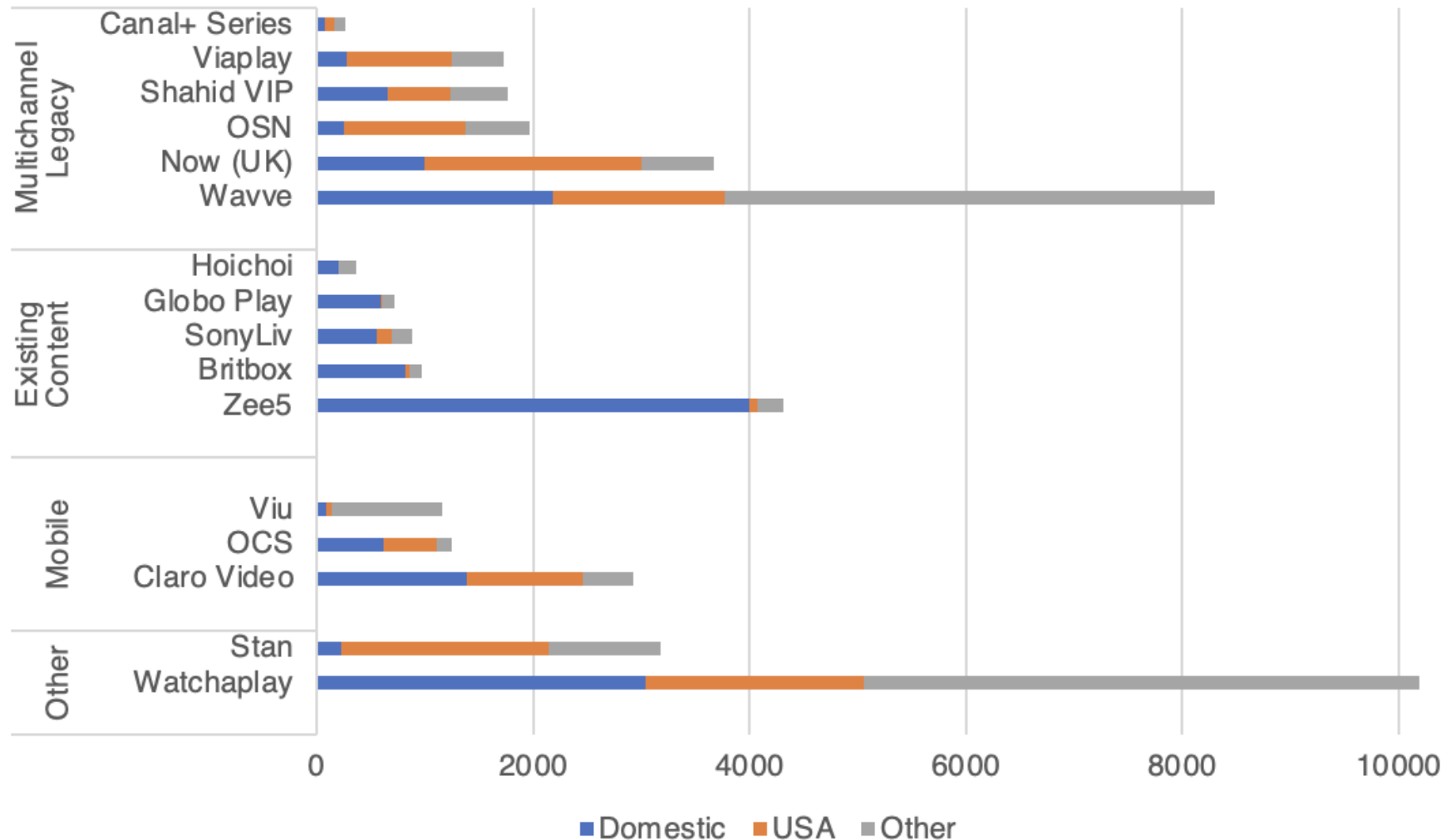
Crunchyroll



Domestic/ regional

- *Single or limited* multi-territory availability
- *Significant or mass* adoption in one country, perhaps niche adoption in more
 - *Legacy multichannel*
 - Canal+ Séries – France
 - NowTV – UK / WOW – Germany (Sky)
 - Binge – Australia / Crave – Canada
 - *Domestic complement*
 - ALTBalaji
 - SonyLIV
 - ITVX
 - Hoichoi

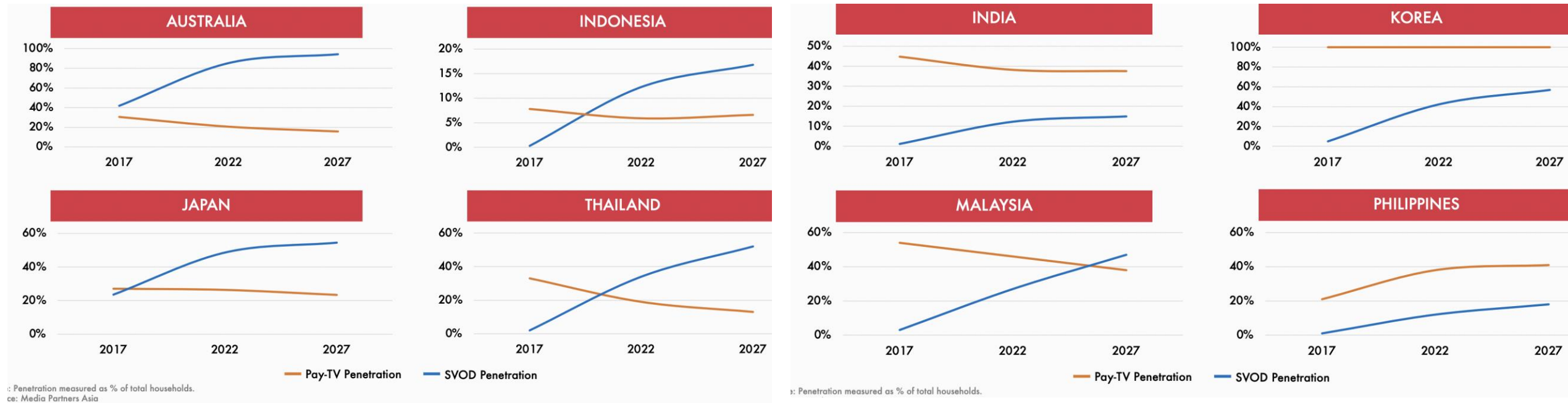
Size, Composition of Sample Services Libraries (by title)



Based on data from Ampere Analysis Aug 2021

Korean market is unusual

Pay-TV v SVOD Penetration in Asia-Pacific



Top Korean Content Carriers Outside Korea

Top 15 Korean content carriers outside of South Korea (June 2022)

Rank	Service	# of distinct titles	Scope of operation	Territory	Subscriptions (m)
1	U-next	1304	National	Japan	2.7
2	Viki	987	Global	Global	NA
3	Hami Video	794	National	Taiwan	1.3
4	Kocowa	707	National	US	NA
5	myVideo	692	National	Taiwan	3.0
6	FriDay	687	National	Taiwan	0.6
7	Netflix	625	Global	Global	220.7
8	Hulu	567	National	Japan	46.2
9	Viu	522	Regional	Southeast Asia	9.6
10	Amazon Prime Video	511	Global	Global	146.2
11	dTV	416	National	Japan	3.4
12	KKTV	335	National	Taiwan	0.9
13	CatchPlay	321	Regional	Southeast Asia	1.7
14	Okko	306	National	Russia	0.9
15	Abema TV	173	National	Japan	1.7

Source: Ampere Analytics SVoD, content type including movies and TV seasons

Top 16-30 Korean content carriers outside of South Korea (June 2022)

Rank	Service	# of distinct titles	Scope of operation	Territory	Subscriptions (m)
16	Premier	135	National	Russia	NA
17	Disney+	79	Global	Global	93.7
18	iQIYI	57	Global	Global	100.9
19	Disney+ Hotstar	46	Regional	India, SEA	58.4
20	Tivibu	45	National	Turkey	1.4
21	Mubi	33	Global	Global	1.2
22	Shahid VIP	33	Regional	MNA	2.7
23	Peacock	29	National	US	20.7
24	Globoplay	28	Regional	US, Brazil	5.8
25	Hulu USA	25	National	US	46.2
26	HBO Max	23	Global	Global	65.2
27	ShowMax	23	National	South Africa	0.3
28	Zee5	23	National	India	17.0
29	Netzkino	21	National	Germany	NA
30	Now TV	17	Regional	UK, Italy	2.1

Source: Ampere Analytics SVoD, content type including movies and TV seasons

Source: Ampere Analysis 11 Oct 2022

Still preliminary

Consolidation will come



Thank you!

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