

电视连续剧

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Far from fading, television continues to shine brightly in Asia, is the confident verdict from **Aravind Venugopal**. As analyst at **Media Partners Asia**, a leading provider of research and analysis on media and telecoms in Asia, he has the finger on the pulse of what's happening in the whole region. Here is his overview and outlook

ASIAN TV STAR

The television industry in Asia Pacific remains full of growth with much more potential in the years to come. TV viewership, including both terrestrial free-to-air (FTA) and pay-TV, continues to grow, especially in emerging markets such as India and across Southeast Asia. At the same time, strong macro-economic drivers are creating a powerful demand driver for TV. This is helping fuel both TV and pay-TV household penetration.

According to Media Partners Asia (MPA), the proportion of households that have at least one TV set in Asia Pacific topped 80% in 2011 and will trend towards 90% by 2020. Television viewership in Southeast Asia and India is trending at around four hours a day and FTA TV has an average 70% or more of the total advertising pie in Southeast Asia (with the exception of Malaysia where print

has ~50% share), close to 45% in India and 30% - 40% in North Asia, where broadband and online is more pervasive.

Key macro drivers of future TV industry growth include rising incomes, literacy and the growth of households and urbanisation in major geographies. Industry drivers include the massive growth of local and regional programming in Asia's largest markets and its appeal to consumers across mass demographics as well as key advertisers.

At the same time, pay-TV penetration is growing rapidly, reaching 43% of total households (or more than 50% of TV homes) in Asia Pacific last year. This is expected to grow to about 65% by 2020 (about 70% of total TV homes), according to MPA. The growth of both digital terrestrial TV (DTT) and digital pay-TV in the years to come is important as DTV switch-over approaches in key markets over the next decade, including ▶

China, India, Korea and SEA. About a third of TV homes in Asia had DTV as of end-2011; this is expected to surpass 70% by 2020, driven largely by pay-TV with some DTT, according to MPA.

OTT IMPACT

All this optimism about TV is not to say that the growth of broadband is not having an impact. Fibre deployment, which supports sufficient speeds for quality online video, grew 27% in 2011 to reach less than 70 million homes, still only 7% household penetration, though this is expected to double to 15% over the next decade, implying a base of more than 160 million homes. This base will easily be able to receive broadcast quality video content online.

Much of the volume and market today for over-the-top (OTT) services and online video is in early deployers such as Hong Kong, Japan, Korea and China but going forward next generation broadband systems will proliferate in Australia, Singapore and Taiwan, while there will also be pockets of growth in parts of Southeast Asia. This should be an opportunity rather than a threat for TV broadcasters and operators, especially those who continue to invest in network and content for product innovation.

The multi-screen approach, embracing the four-screen era (TV, smartphone, tablet and PC), is key for many integrated media and telecom operators in Asia, wrestling with the likes of Apple to integrate HD content, cloud storage and digital eco-system services across different screens.

Operators in Australia and Japan have long led the way in HD and DVR deployment, and are now innovating with multi-screen and TV Everywhere type services. In

Hong Kong, Singapore, Taiwan and Malaysia, operators have embraced product innovation and multi-screen strategies, while over the coming months packaging will be simplified in these markets and the user interface improved (especially in Singapore and Hong Kong).

Operators in Singapore, Taiwan, Korea, Australia and Malaysia have also driven HD growth and accelerated broadband speeds to maximize the consumer experience while in Korea, Australia and Malaysia, KT SkyLife, Foxtel and Astro have rolled out hybrid DTH-IP set top box services offering consumers HD channels, VOD and Internet functionality.

In China, traditional cable operators have digitalised infrastructure and are now deploying VAS and HD services.

In Asia's growth markets – India, Indonesia and Southeast Asia – the focus remains very much on single products, as TV remains a vital consumer media growth platform. Nonetheless, DTH and cable operators are investing in HD and DVRs, though the focus is on volumes and grabbing eyeballs. In the future, DTH platforms may be required to transition to a multi-play strategy as broadband adoption picks up, though fibre penetration will remain modest in India and Indonesia in particular.

PAY-TV GROWTH

The key to the future of pay-TV is dependent on the next five years of development in India and Southeast Asia. Pay-TV in India and Indonesia is growing at a rapid pace in particular, with competition intensifying and structural dynamics changing, while DTH platforms are emerging as key gatekeepers. Similar trends are occurring, though arguably with

“ In China revenues from HD and VAS will grow rapidly ”



less intensity, in markets such as Malaysia, Philippines, Thailand and Vietnam.

Future growth in these markets will depend on ground execution and access to capital. India is set to undergo a massive digitalization process that will drive value across the industry eco-system, but it is a process that will require strong execution and high levels of funding. Multiple new operators are entering into Indonesia's pay-TV market, while incumbents are also consolidating and accessing capital markets to fund future growth. In Thailand and Malaysia, new entrants could drive large-scale growth but there is a significant risk on ground execution.

MPA projections indicate that the pay-TV market in Asia Pacific added 35 million net new homes in 2011. Excluding the utility-driven China market, the region added 15 million new subscribers. Ex-China, India accounted for more than 60% of the new growth in 2011, with Southeast Asia contributing 15%, led by Indonesia with 5%. North Asia remains significant, contributing 17% to net adds in Asia ex-China in 2011, driven by Korea at 11% (fueled by DTH and IPTV).

MPA analysis also indicates that global pay-TV penetration will grow from 58% to 72% between 2011 and 2016, driven in particular by the growth of key distribution platforms in Asia Pacific. The latter will account for 62% of global pay-TV subscribers by 2016 versus 57% in 2011, driven by contributions from markets such

Asia Pacific TV Industry Revenue Trends (US\$ bil.)							
	2011	2012	2013	2014	2015	2016	CAGR 2011-16
Total TV Sales	69.2	74.5	80.3	86.4	91.5	98.5	7.3%
Advertising	35.9	37.9	40.3	43.1	45.6	48.4	6.1%
Subscription	33.3	36.7	40.0	43.4	46.0	50.1	8.5%
Note: Includes free-to-air and pay-TV platforms with recognition of linear and non-linear services							
Source: Media Partners Asia							



- ◀ KT SkyLife is making inroads with 3D as well as HD
- ▲ Anindya Bakrie, head of VIVA - owner of Indonesia's tvOne and antv
- ▶ Astro On-the-Go gives customers constant access to channels



as China, India, Indonesia, Malaysia, Japan and Korea.

MPA projections indicate that between 2011 and 2020 the market for pay-TV in Asia will see 318 million-plus net new additions, or 125 million in Asia ex-China. South Asia's (i.e. India, Pakistan, Sri Lanka) contribution to new growth ex-China will be more than 75%, with Southeast Asia representing 15% (led by Indonesia at 5%) and North Asia coming in at 8%.

In addition, digitalization will have a major impact on industry growth in China, Japan, Korea, Malaysia, the Philippines, Thailand, Vietnam and Taiwan, as operators invest more in upgraded networks to support new services, volumes and higher average revenue per user.

Markets	Total TV Sales (US\$ bil.)
China	31.1
Japan	22.3
India	14.3
Australia	7.9
Korea	7.4
Indonesia	3.5
Taiwan	2.4
Note: Includes net advertising after discounts and subscription fees	
Source: Media Partners Asia	

KEY MARKETS

China, India and Indonesia dominate growth trends for the TV industry while Thailand, Vietnam and the Philippines also offer growth potential along with untapped

territories such as Myanmar.

In Indonesia television industry sales will grow at 17% over 2011-16 to reach US\$3.5 billion per year in net terms by 2016, says MPA, driven by FTA terrestrial advertising growth and the proliferation of DTH-driven pay-TV. FTA networks, in aggregate, are expected to retain about 70% of the media ad spend pie by 2016 while pay-TV penetration is expected to climb from only 5% in 2011 to 14% by 2016.

No one stands still in Indonesia. Many of the groups that acquire and produce local and international content, including MNC group, Emtek, Trans, and Bakrie / Viva, are also in the driving seat for pay-TV and online media. MNC owns the largest pay-TV operator, significant production capabilities and a clutch of online sites; Trans has a leading online presence and scores of studios; Emtek, a FTA cash cow, has launched a DTT-enabled pay-TV service; and Bakrie is investing in online and may move into pay-TV.

DTT WILL BE BIG

The big new development in Indonesia is DTT licences, the bidding for which is underway with 41 licences up for grabs although actual commercial launch will likely only play out after another 2-3 years. The DTT licences will be split into 15 service zones with the four existing broadcast groups. While the cost to upgrade is affordable for existing groups, the cost to the government and related associations is steep.

The big new development in Indonesia is DTT licences

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In China, macro-economic fundamentals and a strong national mandate will continue to drive digital growth for all TV distribution platforms including digital cable TV, IPTV and DTH as well as broadband. Any upside to the growth of pay-TV remains capped however, due to regulatory dynamics and the development of broadband online platforms as a potentially more viable window for premium content. That said, revenues from HD and value-added services (VAS) will grow rapidly as the adoption of HDTV and VOD reaches critical mass.

India remains a large scale cable & satellite marketplace with more than 600 channels. The transition to pay-TV was first driven by the significant growth of DTH after 2006 and now the focus is on digitising India's fragmented 80 - 90 million or so cable households, which the government wants to take place over the next three years.

Digitalisation will undoubtedly boost commercial and content prospects for television broadcasters. The first boost will come through a higher proportion of subscription revenues, as well as potentially rationalized carriage and placement fees, which channels currently pay out to cable operators. At the same time, broadcasters in both niche and mass genres will need to programme stronger, differentiated content to survive and prosper, and create consumer demand in a new eco-system. ■