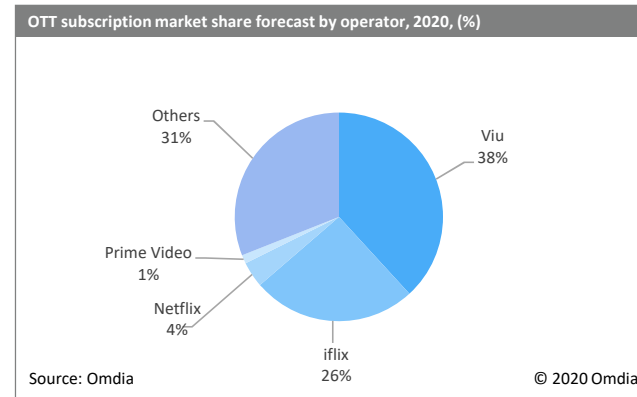
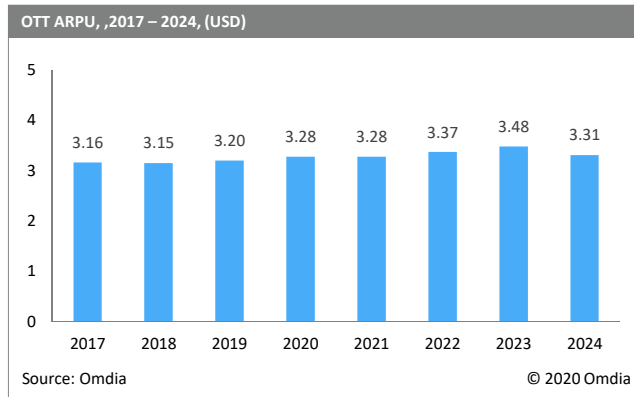
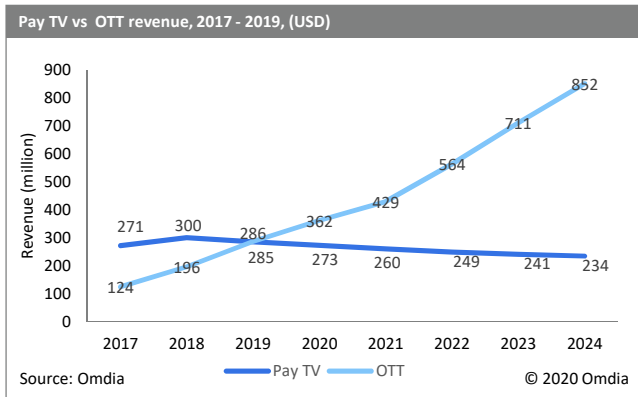
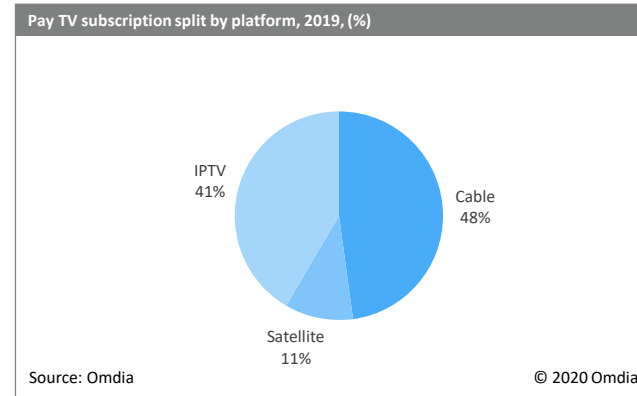
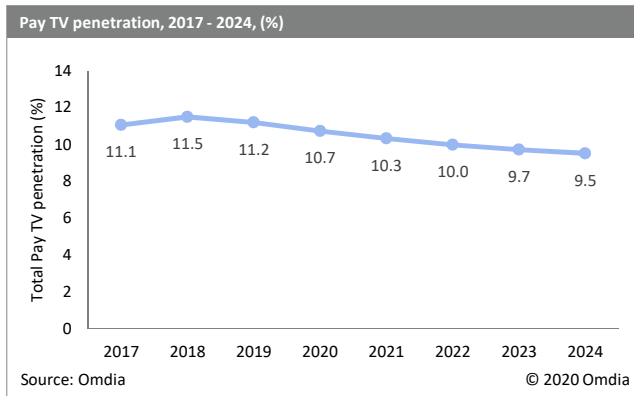
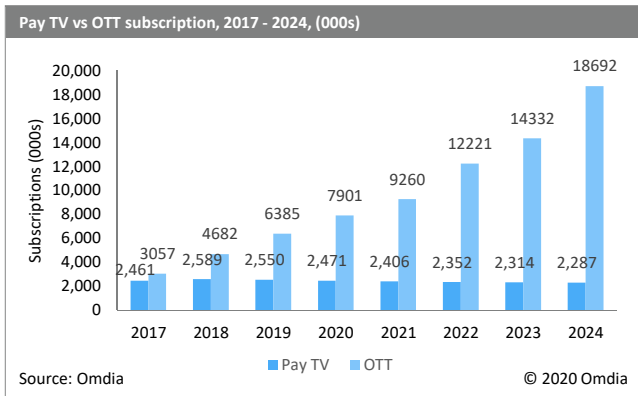


Thailand Overview:



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Summary

- Based on recent research, Omdia seen subscription numbers for Pay TV operators fall by 1.5% to 2.5 million in 2019. This is a drop from 2.6 million a year ago. OTT subscriptions surged 36.4% to almost 6.4 million over the same period.
- The total Pay TV revenue in 2019 was \$285 million, compared to \$286 million for an online subscription. Despite the OTT's rapid rise in subscriptions, OTT providers are still on par with pay TV operators in terms of revenue generation.
- Although Satellite accounted for only 11% of the Pay TV subscription, it remained the fastest growing traditional pay TV platform, up 1.3% to 1.1 million in 2019, albeit at a slower pace when compared to 2018 (which was at 3%). Cable and IPTV services with year-end subscriptions decreased 3% and 5%, respectively.
- Despite the surge in OTT subscriptions, the ARPU remain stagnant at below \$4 due to the pricing structure and strong competition among the OTT players in the country.
- The nascent online video market in Thailand continues to grow despite a lack of broadband infrastructure, rampant piracy, and low credit card penetration. Providers have innovated to overcome these difficulties. iflix and Viu have partnered with mobile operator AIS to offer payments via carrier billing. Furthermore, iflix introduced an offline payment option in May 2018 where customers can purchase an iflix subscription from more than 2,500 convenience stores, like Family Mart and Tesco Lotus without credit card requirement.
- Omdia forecasted that Viu will lead the OTT market at the end of 2020 with 38% market share. Other OTT subscription services accounted for 31% market share. This portion of the pie includes international providers such as Apple TV+, Eros Now, and Line TV, as well as local services like Doonee, Hollywood HDTV, Monomaxxx, and Primetime.
- There are a wide range of opportunities and challenges facing by operators across the country. However, an offering of compelling content at a competitive price point that delivers on the promise of anytime-anywhere TV and video will capture these opportunities, overcome the challenges, and ultimately find success by delivering a customer experience that consumers are willing to pay for.
- It's worth sharing, Tencent launched WeTV in June last year and HOOQ exited the market in April this year.