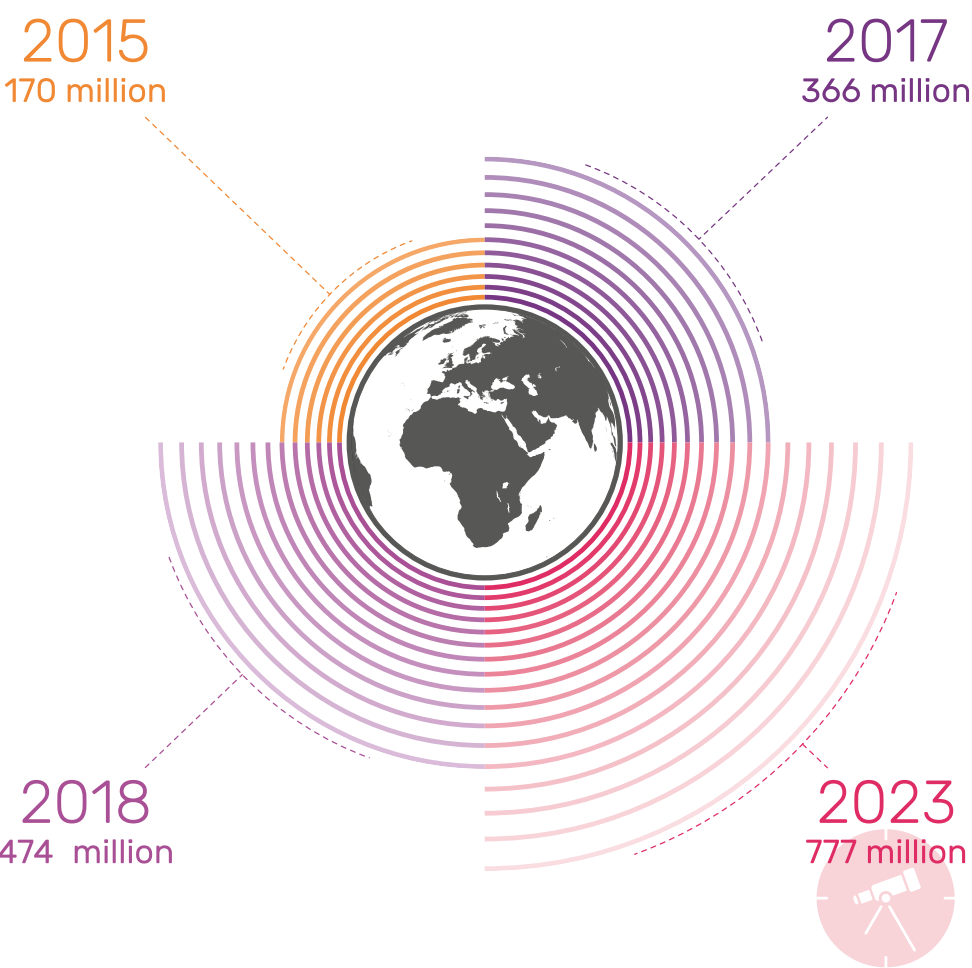


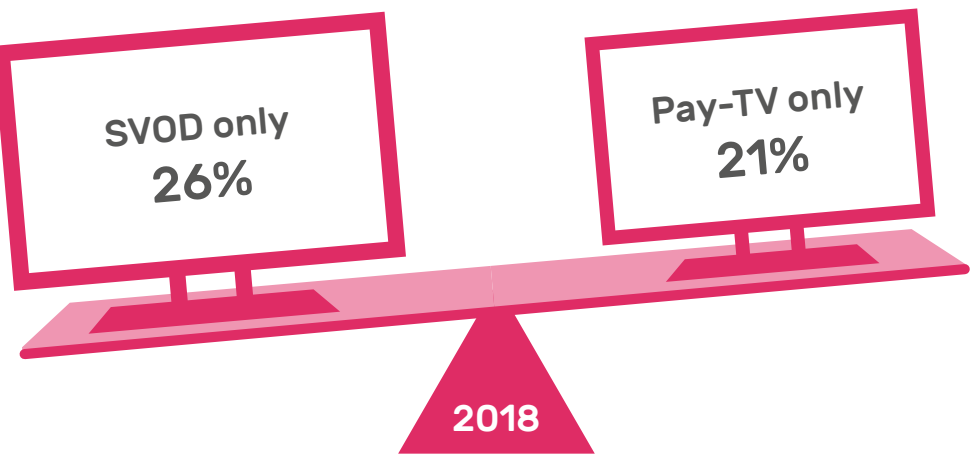
The Pivot Towards SVOD

The overall picture of SVOD is one of growth

**Global SVOD subscribers continue to grow<sup>1</sup>**  
The worldwide market has grown 2.8x in three years and continues to expand



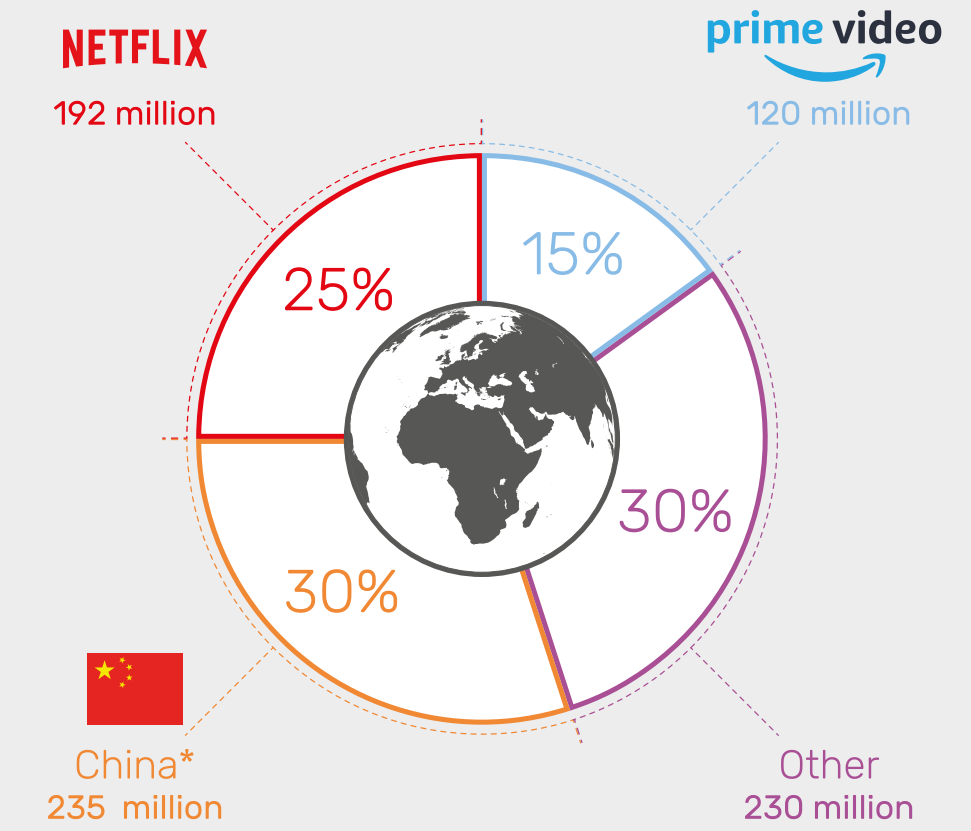
**A tipping point 2018<sup>2</sup>**  
SVOD-only households overtake Pay-TV only households in key markets



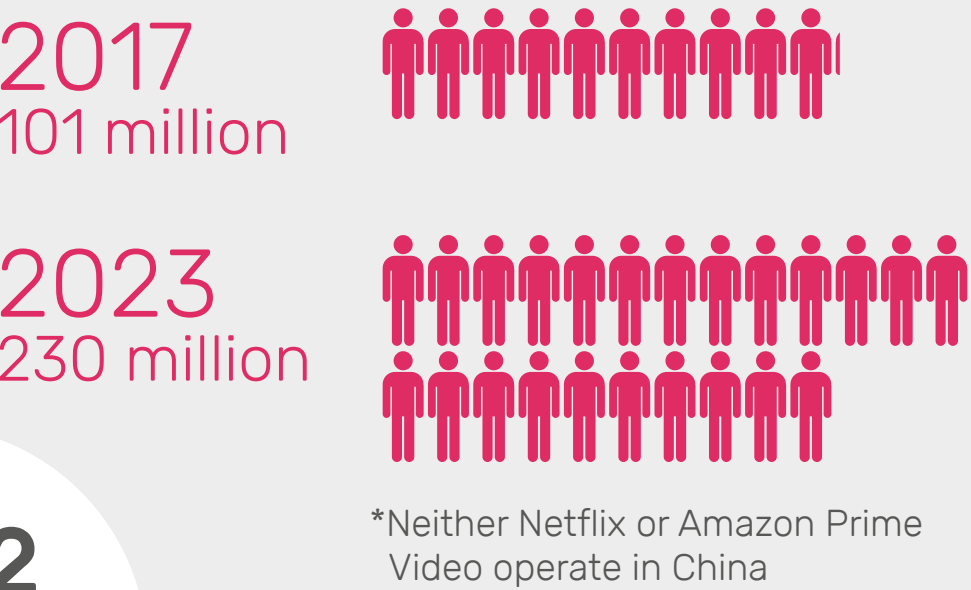
Total SVOD Revenue 2018<sup>1</sup>



**Percentage of global SVOD market in 2023**  
Netflix is not the only game in town<sup>1</sup>

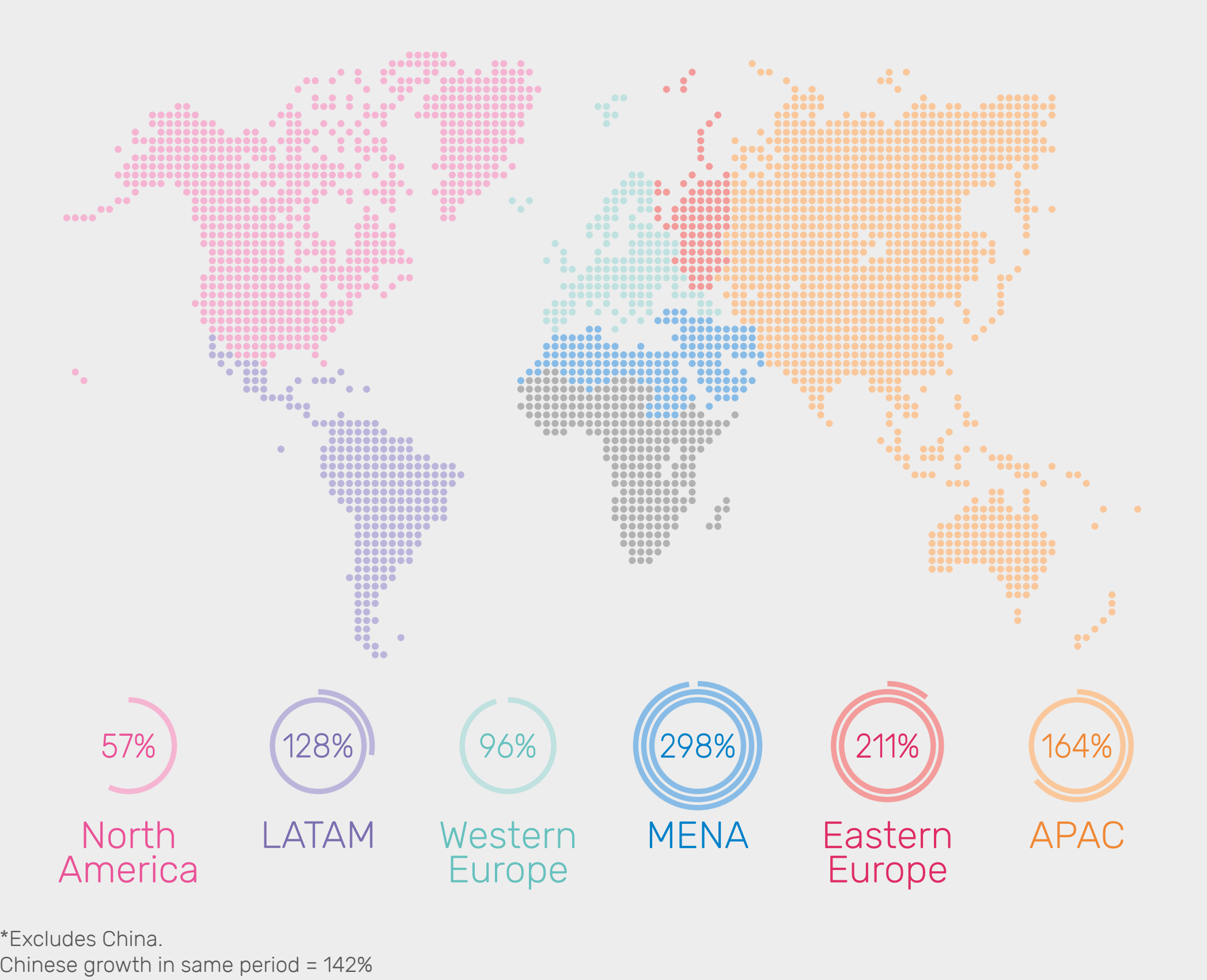


**Global SVOD Growth Excluding Netflix, Amazon & China<sup>1</sup>**

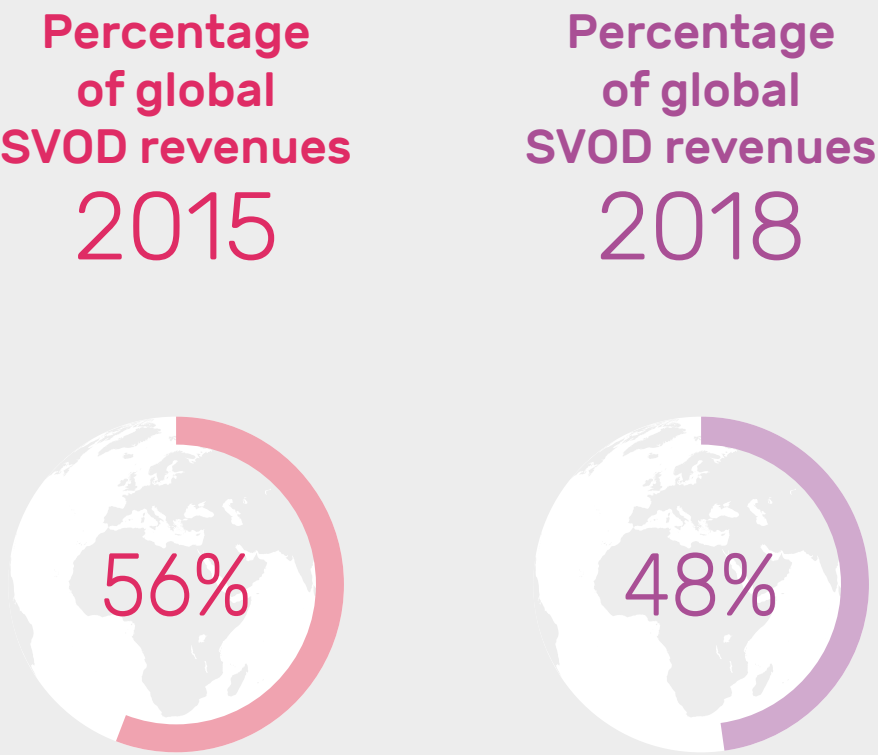


Global Opportunities Exist

**Growth Rates by Region, 2017 to 2023. Number of Subscribers\*<sup>1 6 7 8</sup>**



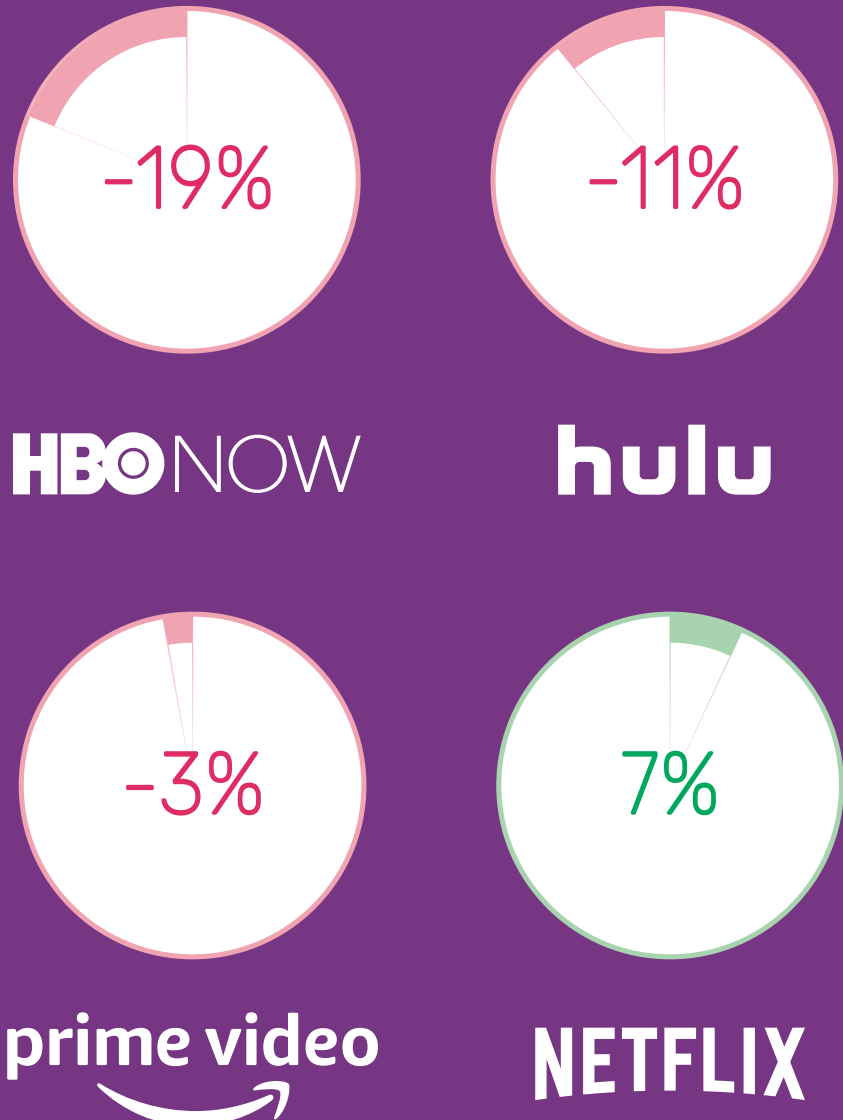
US loses SVOD dominance<sup>1</sup>



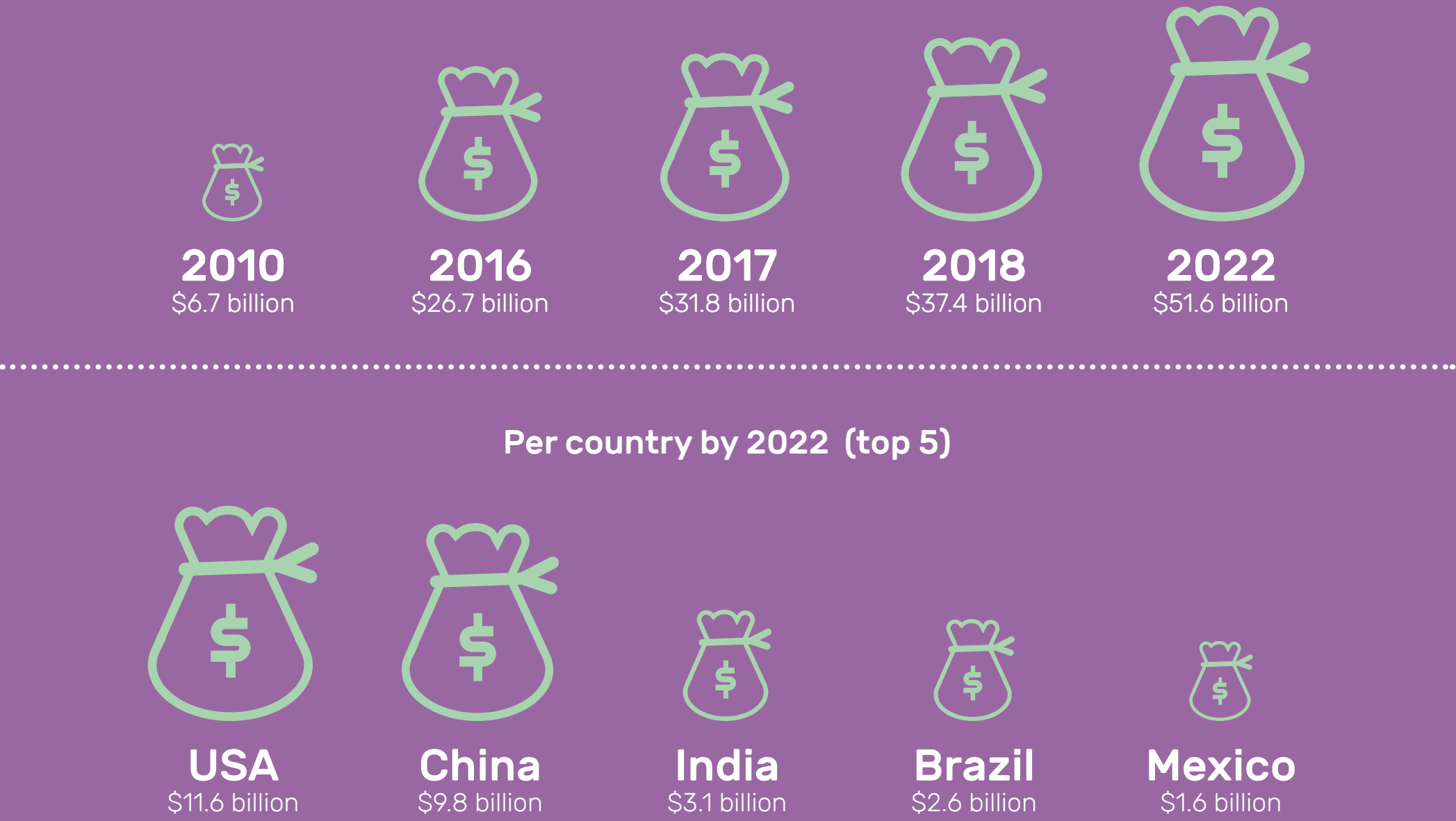
**SVOD stacking increasingly normalized<sup>3</sup>**



Churn rates remain challenging<sup>4</sup>



Global losses to piracy<sup>5</sup>



Find out more about proven and effective Anti-Piracy Services: <https://www.viaccess-orca.com/anti-piracy-protection.html>

<sup>1</sup> Digital TV Research, various OTT TV & Video Forecasts, 2018  
<sup>2</sup> <https://www.ampereanalysis.com/blog/aaae9a6c-e7eb-496c-bedc-e9e36f78ce1f>  
<sup>3</sup> <https://www.digitaltveurope.com/2018/07/09/ampere-svod-stacking-fuelling-growth-of-subscription-market/>

<sup>4</sup> <https://www.juniperresearch.com/press/press-releases/amazon-prime-hbo-now-tv-face-decreasing>  
<sup>5</sup> <https://www.broadbandtvnews.com/2017/10/30/online-tv-movie-piracy-losses-to-soar-to-52-billion>  
<sup>6</sup> <https://www.digitaltveurope.com/2018/09/10/svod-use-in-western-european-tipped-to-reach-69-of-homes-by-2023/>

<sup>7</sup> <https://www.digitaltveurope.com/2018/07/25/digital-tv-research-351-million-svod-subscribers-in-apac-by-2023/>  
<sup>8</sup> <https://www.digitaltveurope.com/2018/09/25/global-svod-subs-to-more-than-double-with-china-taking-lead>