

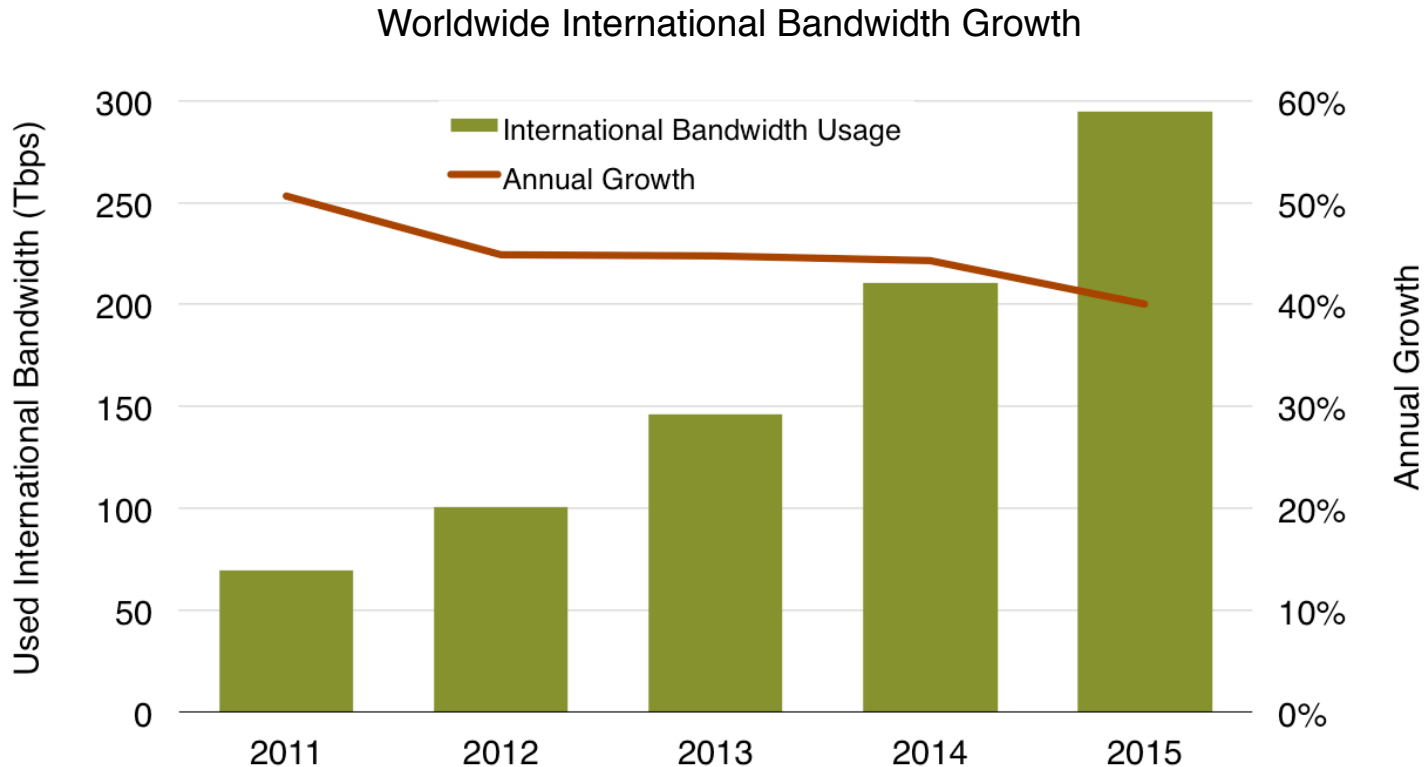
Connectivity Trends in Asian Markets

Anahí Rebatta
TeleGeography
9 May, 2016

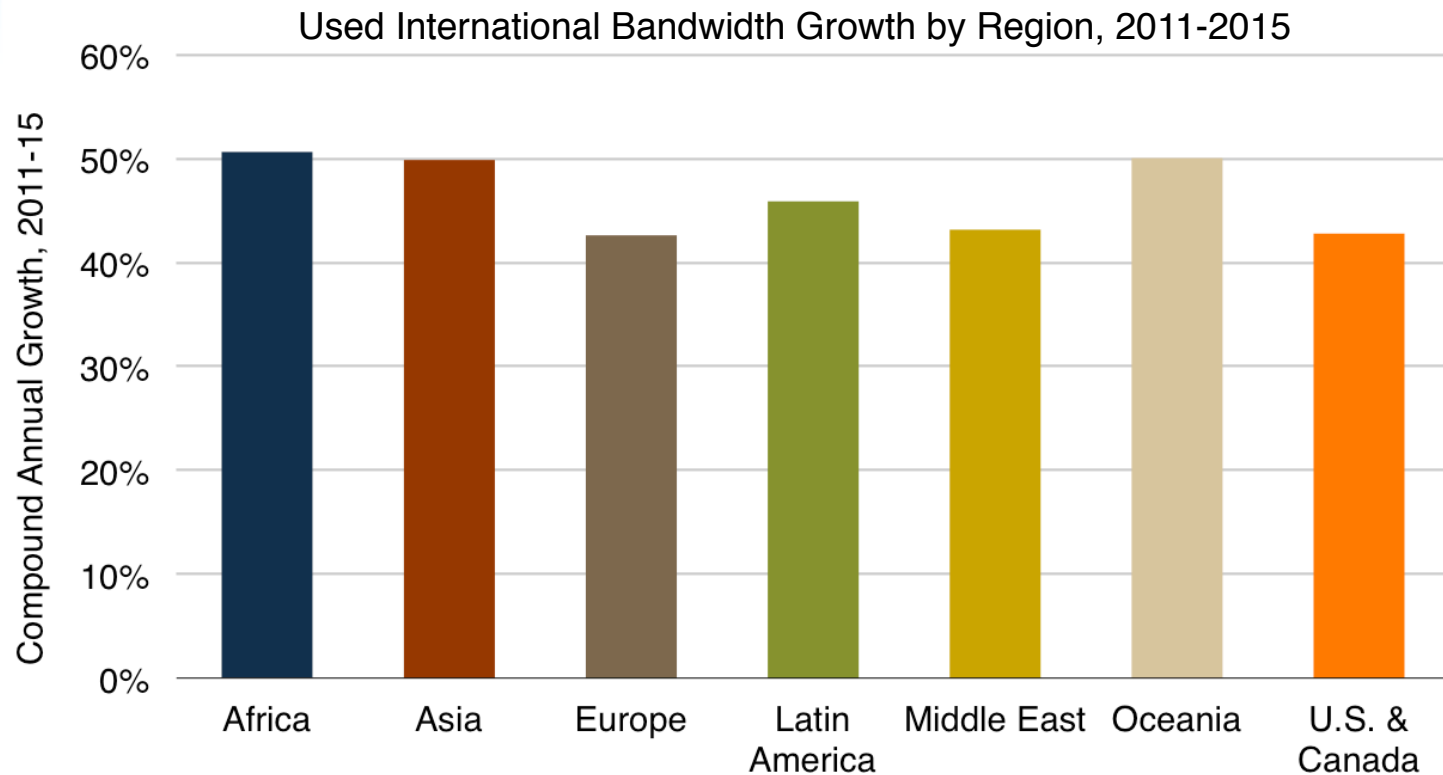
Introductory housekeeping

- TeleGeography's research focuses on international networks.
- Used international bandwidth refers to the sum of all capacity deploy for Internet backbones, private networks, and switched voice networks.

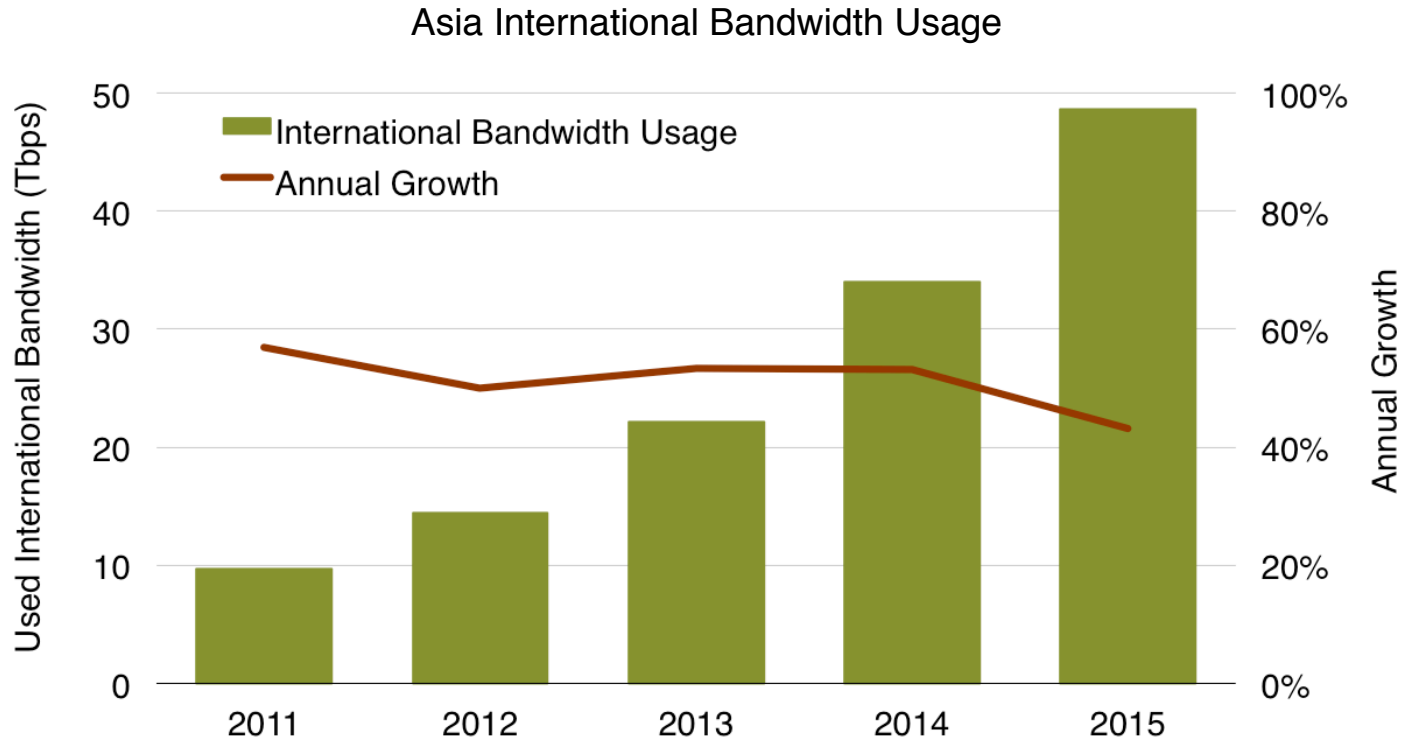
Overall worldwide bandwidth growth



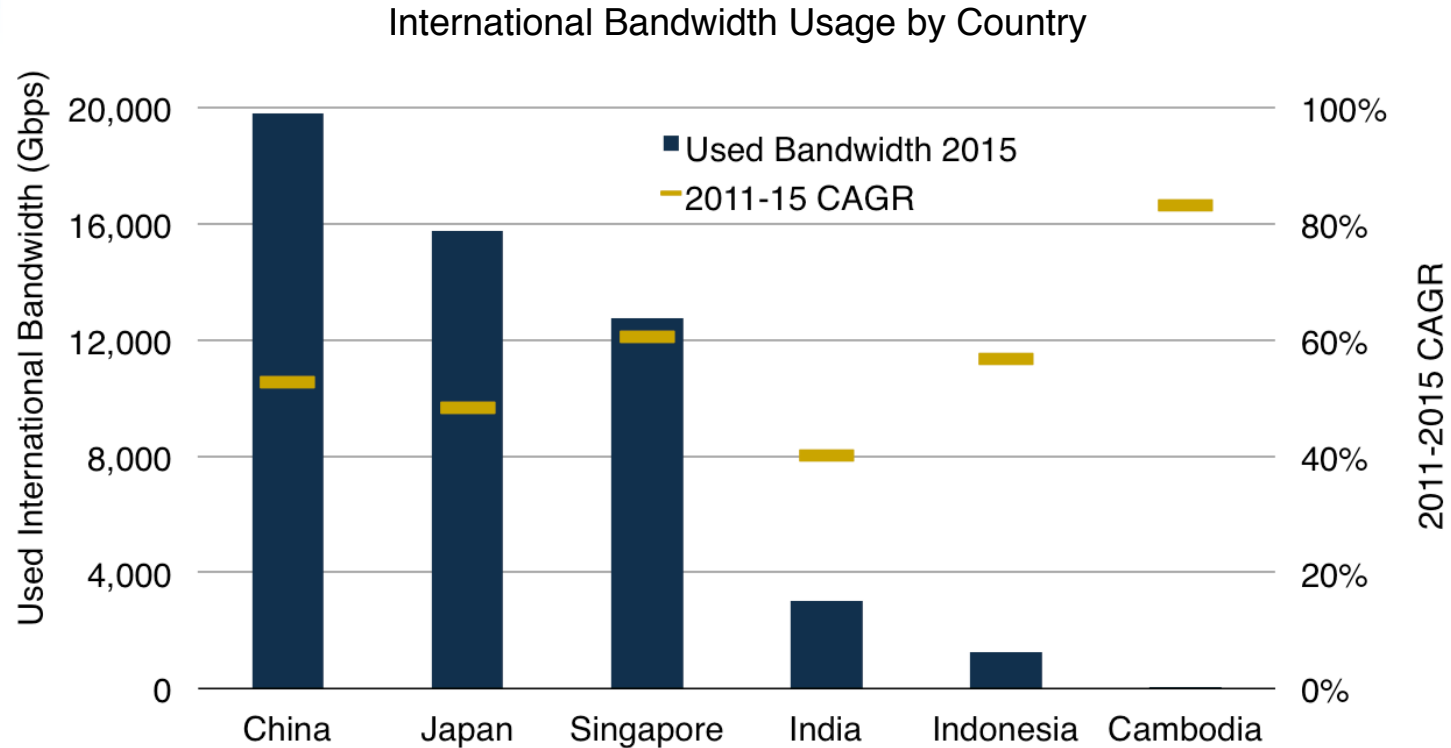
Bandwidth growth - Asia vs. Rest of the world



Bandwidth growth in Asia

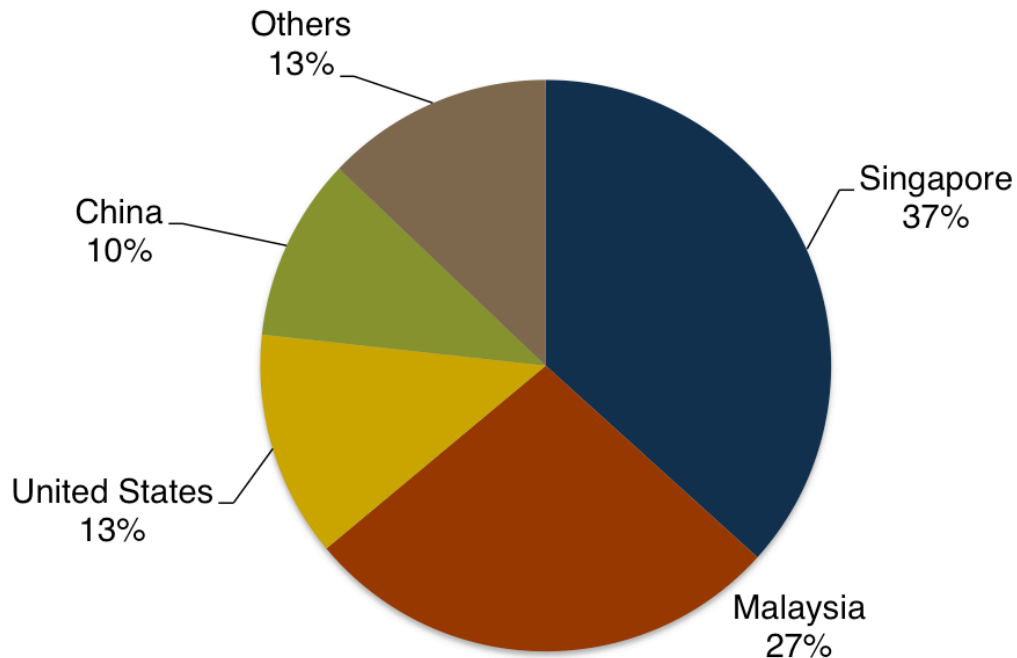


Demand within Asia varies greatly

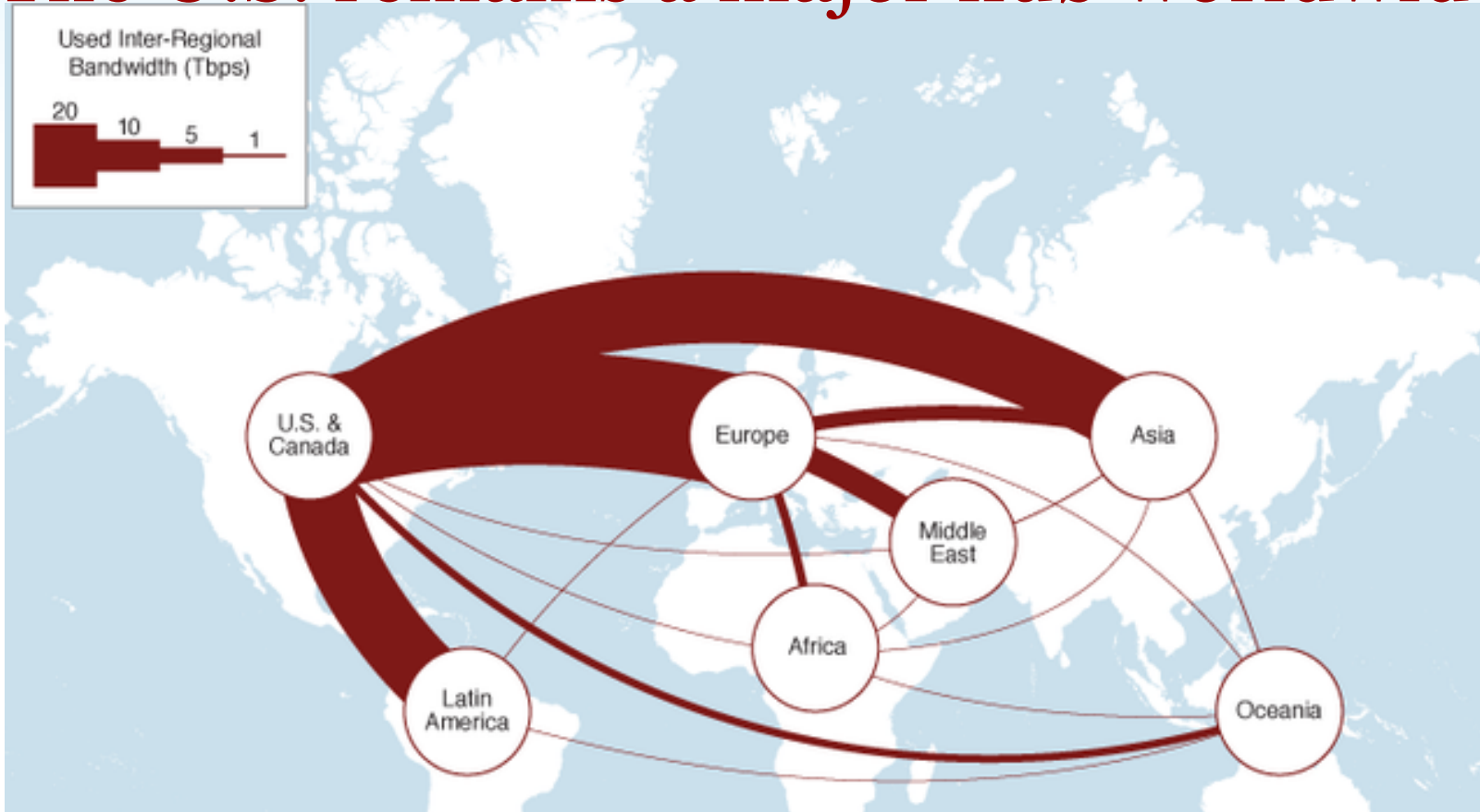


How Thailand is connected

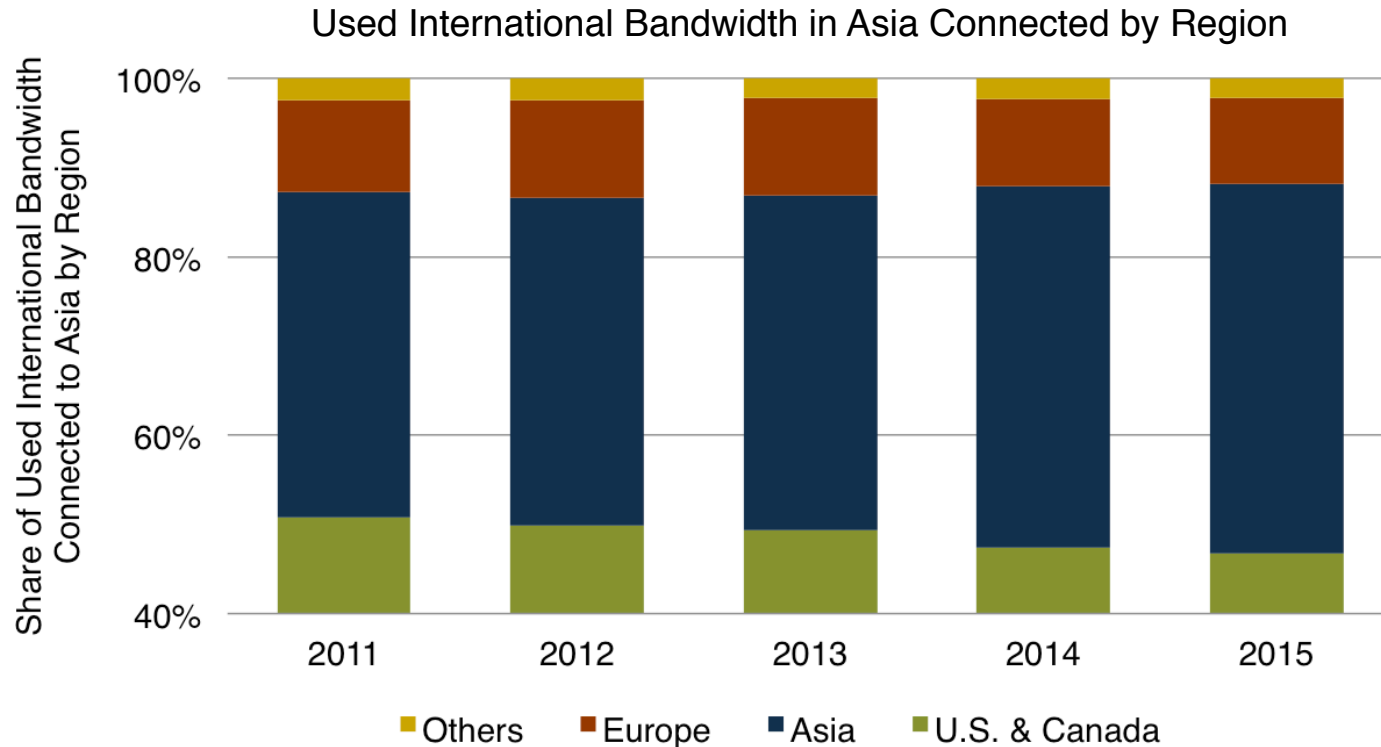
Thailand International Internet Bandwidth Connected by Country, 2015



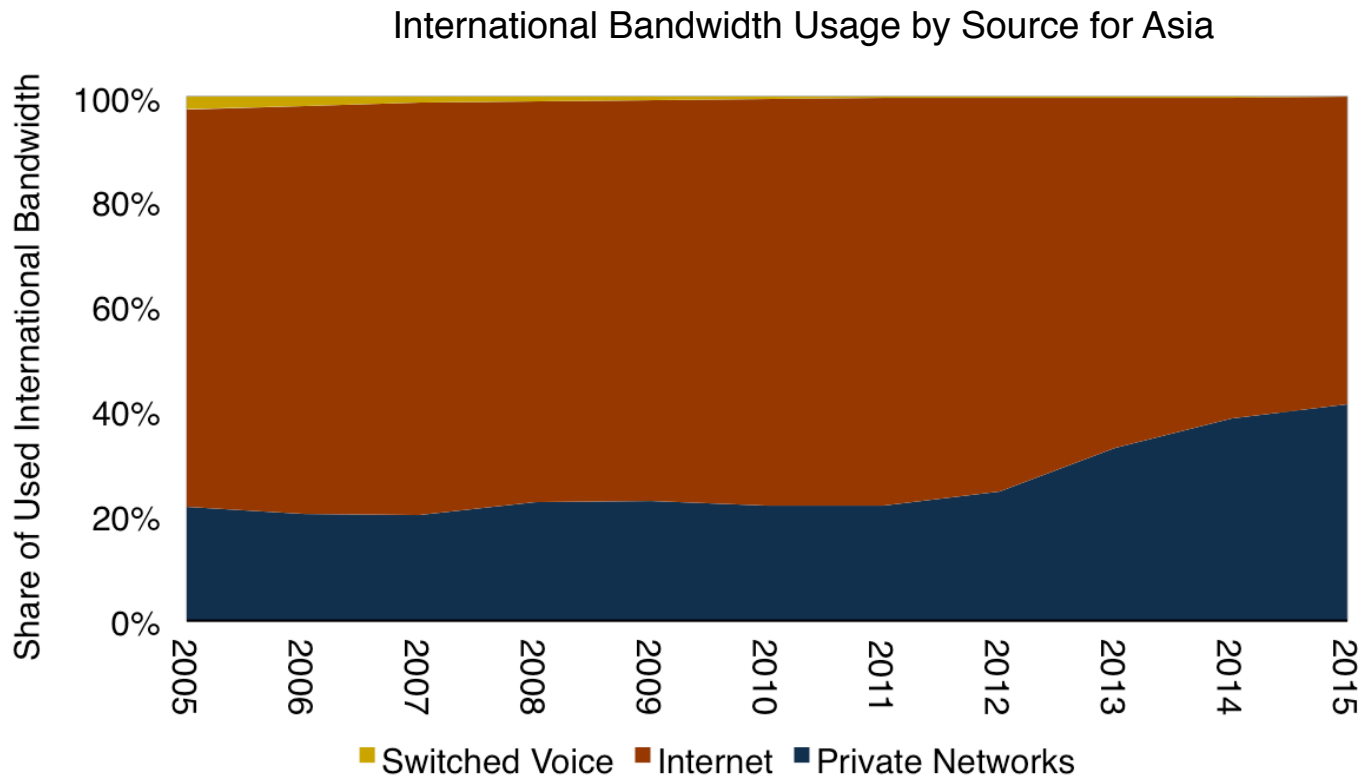
The U.S. remains a major hub worldwide



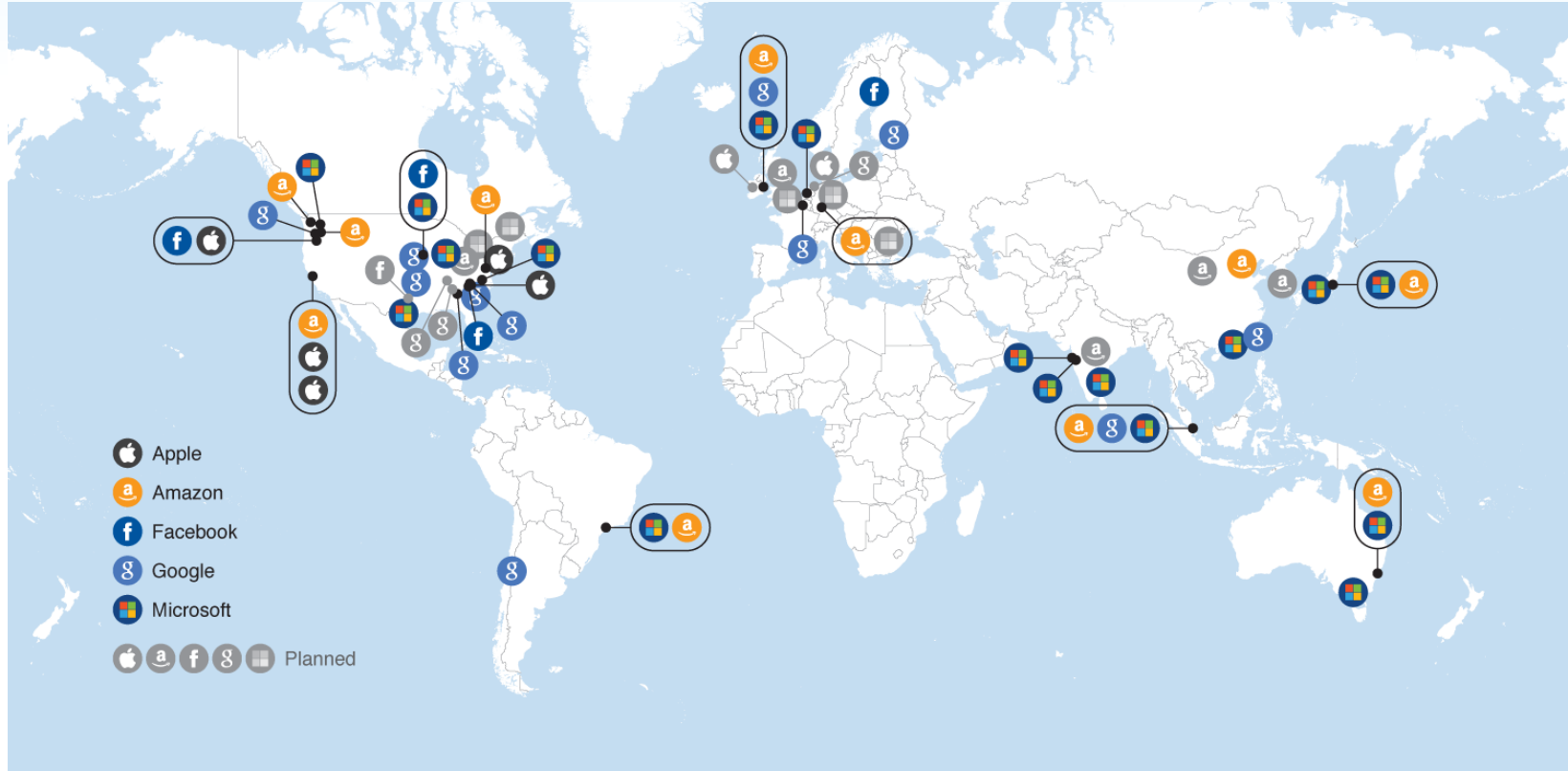
Asia continues to decentralize away from the U.S.



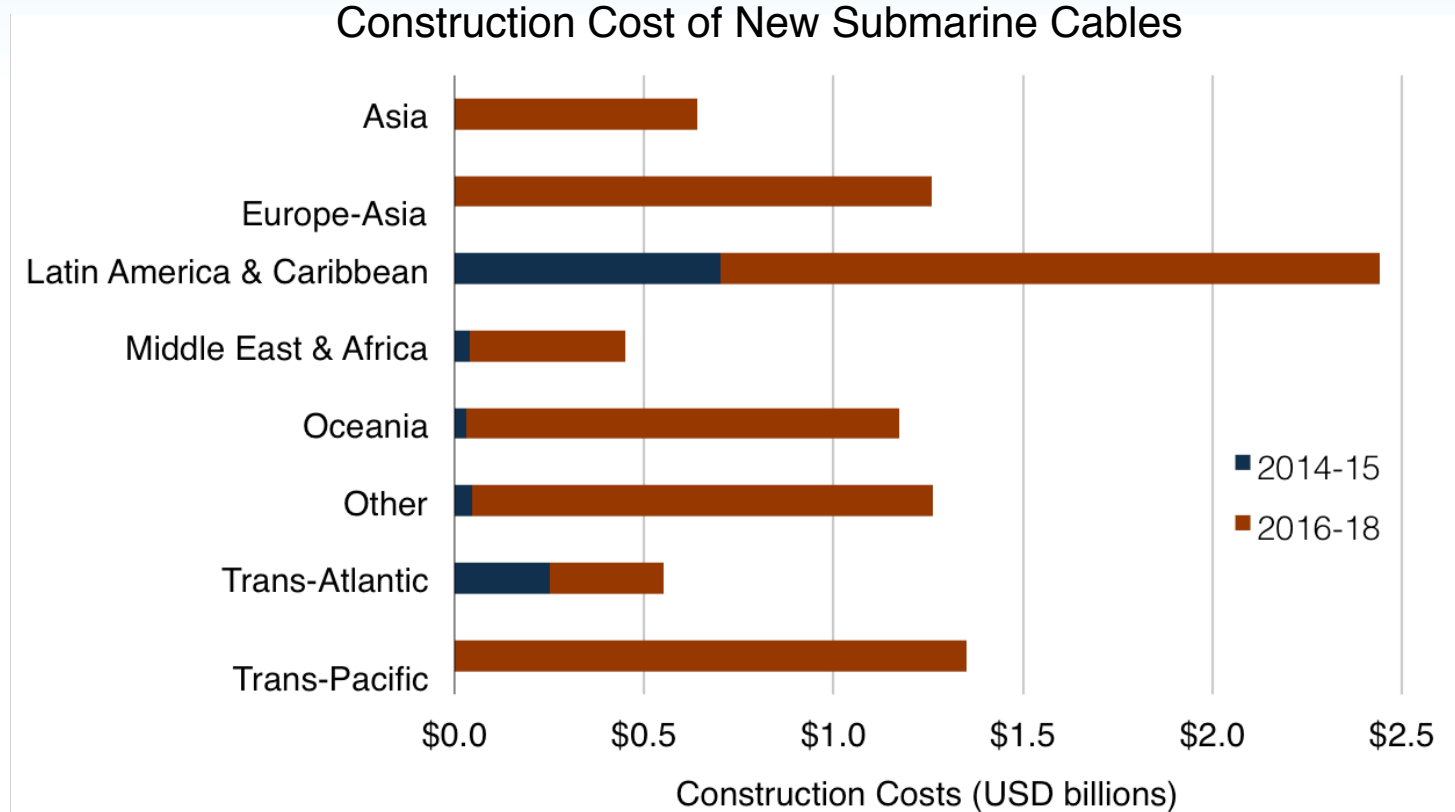
Shifting source of Asia bandwidth demand



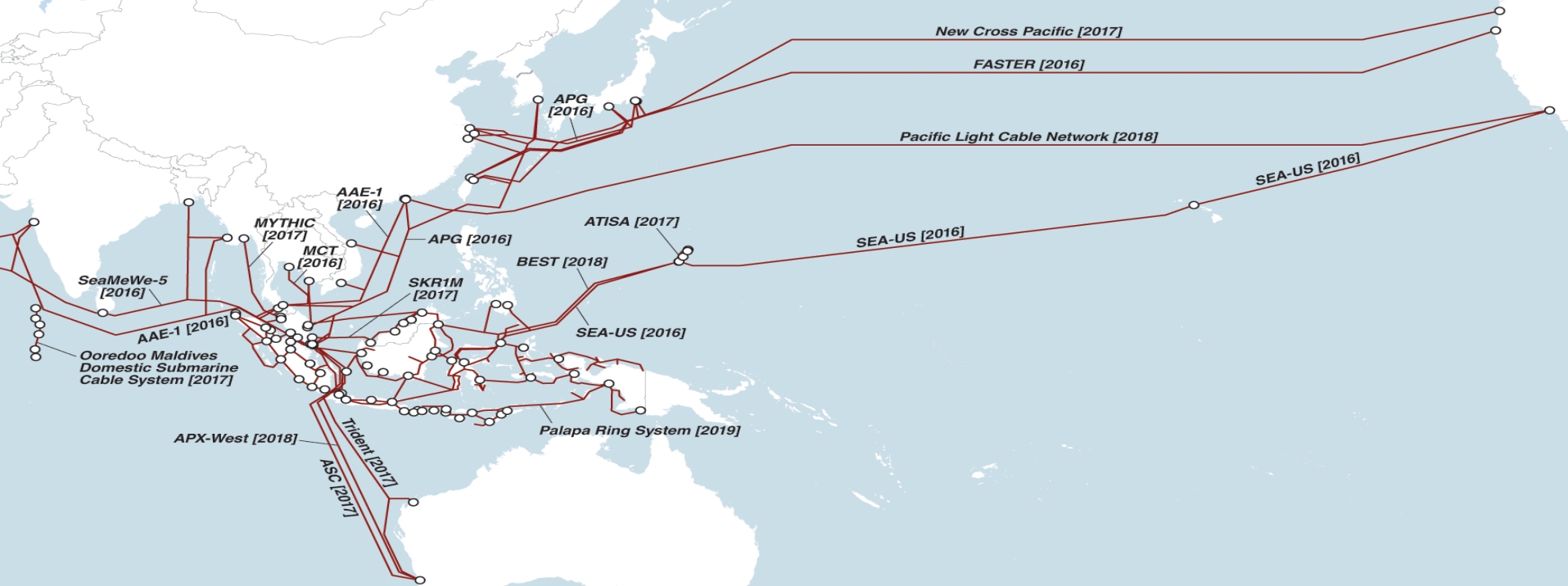
Content providers data center locations



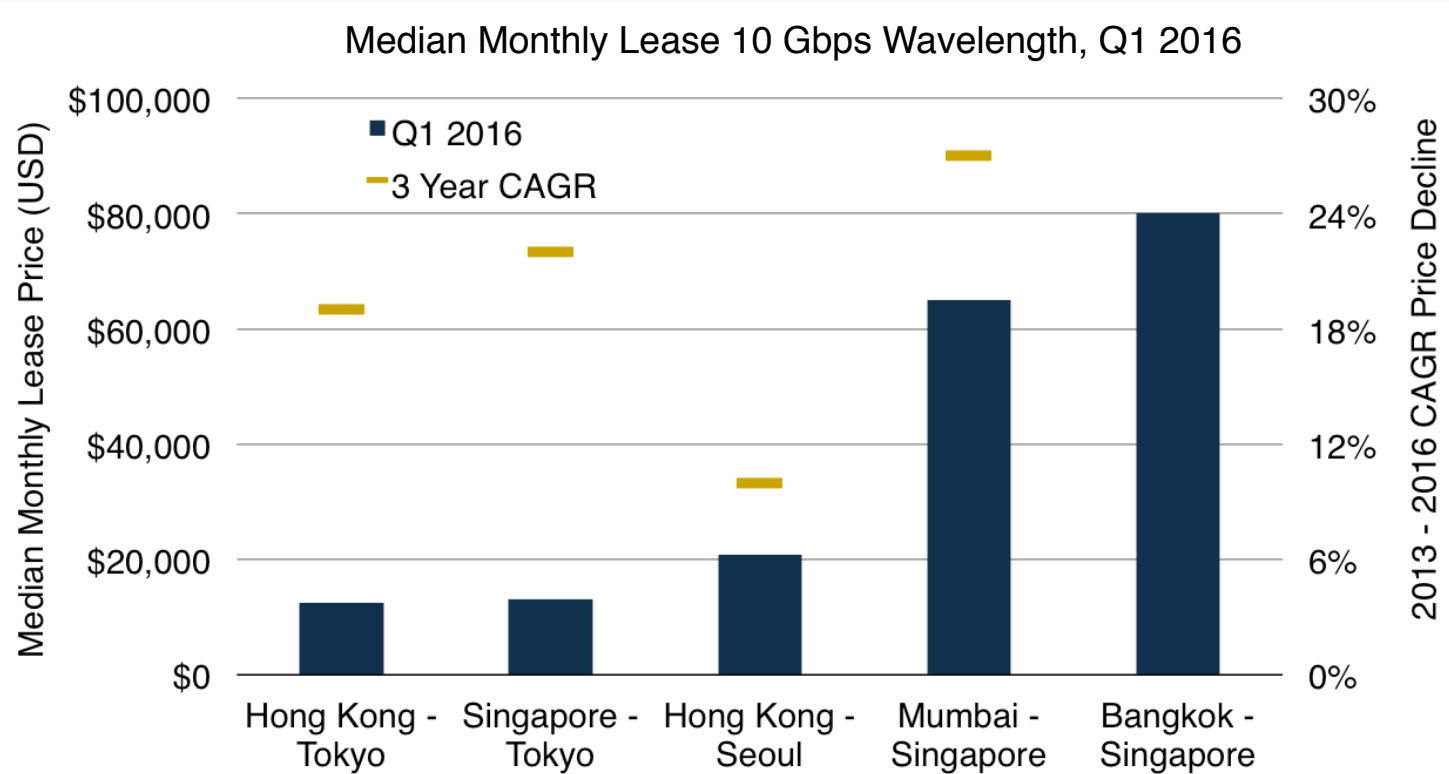
Investment in new submarine cables



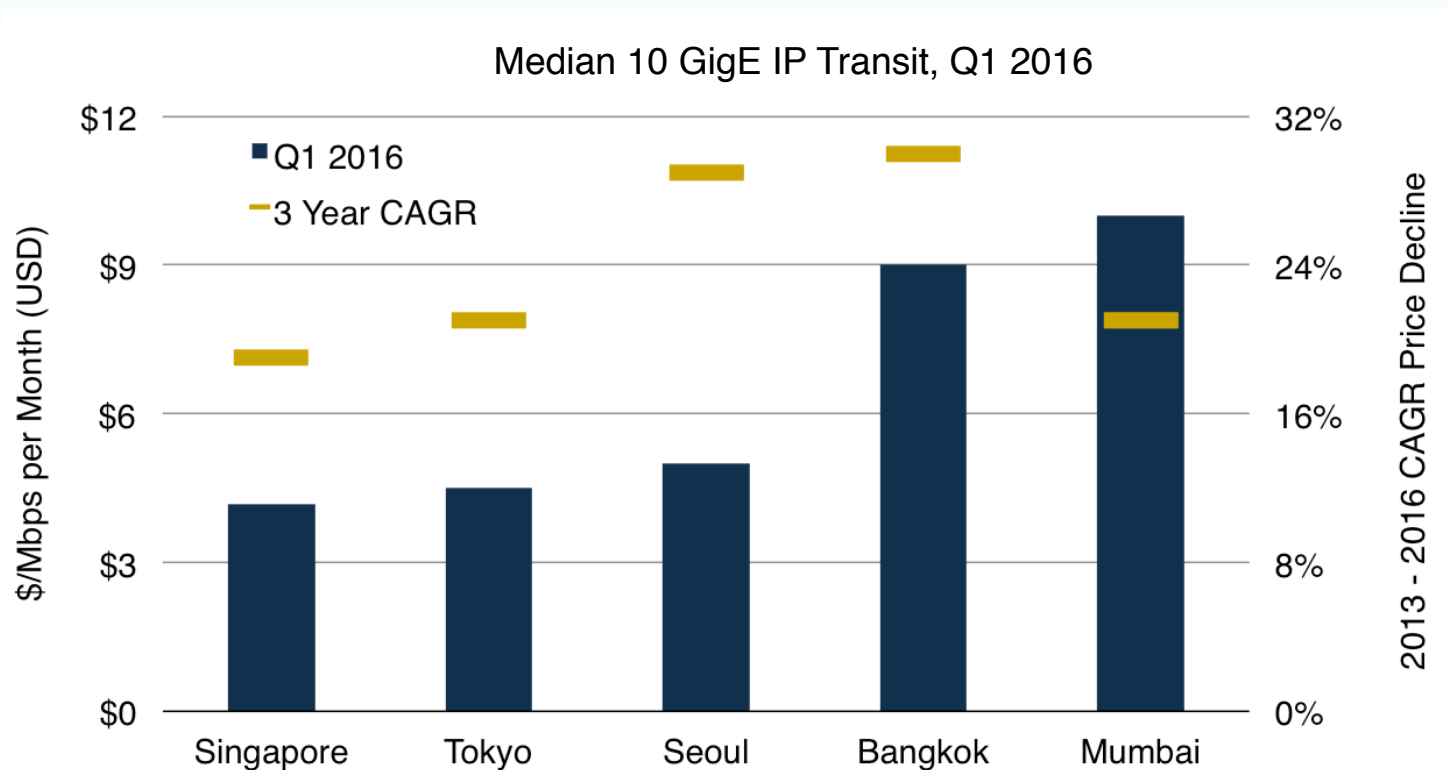
Proposed Cables, 2016-2018



Bandwidth prices vary and are falling



IPT prices vary by city and are falling



Outlook

- Demand in Asia more than doubling every two years.
- Private networks demand on the rise.
- Several cables in the works and even more cables proposed.
- Continued price erosion expected.

Thank you!

Anahí Rebatta
arebatta@telegeography.com