



AWS Edge Day - Shanghai

Opening

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Global CDN Market Trend – Events impact



Social Media

People are turning to social media with more time at home. For example, the amount of **Twitter conversations** between mid-March and the beginning of June was nearly 40x that between January and March.



Streaming/Over-the-top (OTT) media services

Before COVID-19, streaming video accounted for more than **50%** of total data consumed on the internet. Streaming grew by **1 billion hours** across devices between March and May 2020.



eCommerce

Most online retail categories saw more than **10% growth in customer base** since March, with many consumers saying they will continue shopping online for the foreseeable future. The fastest-growing regional ecommerce market is **Asia Pacific**, specifically China.



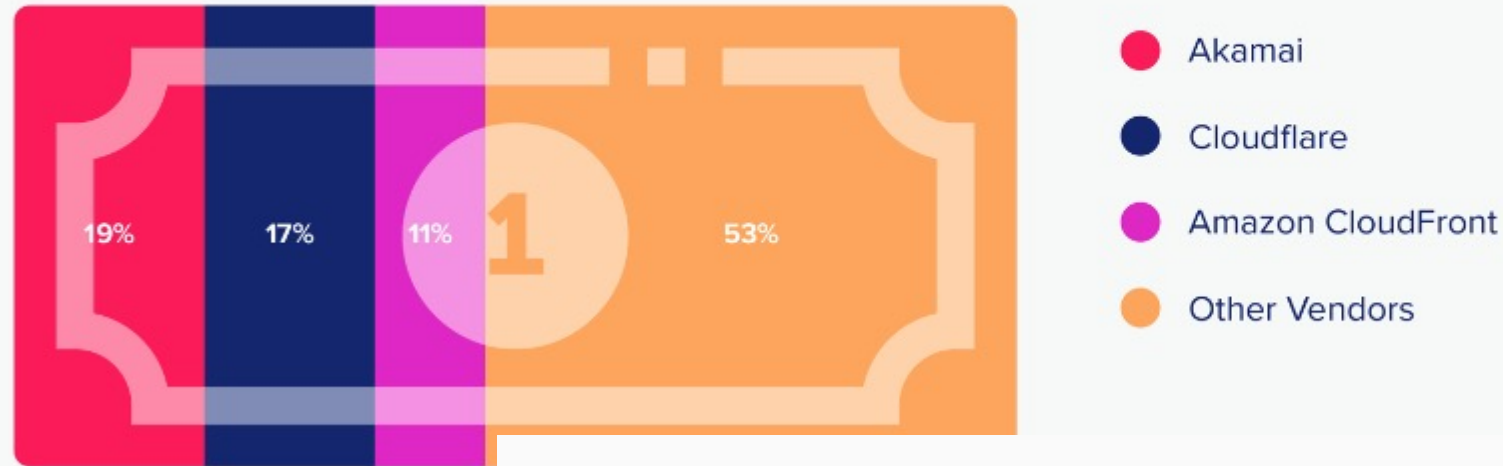
Gaming apps

Daily **Twitch viewership** in the U.S. more than doubled in Q1 2020. The number of gamers who say they play more video games due to COVID-19 has steadily increased week over week since March.

Top players and Hot Geo. area

Walletshare of Top CDN Providers

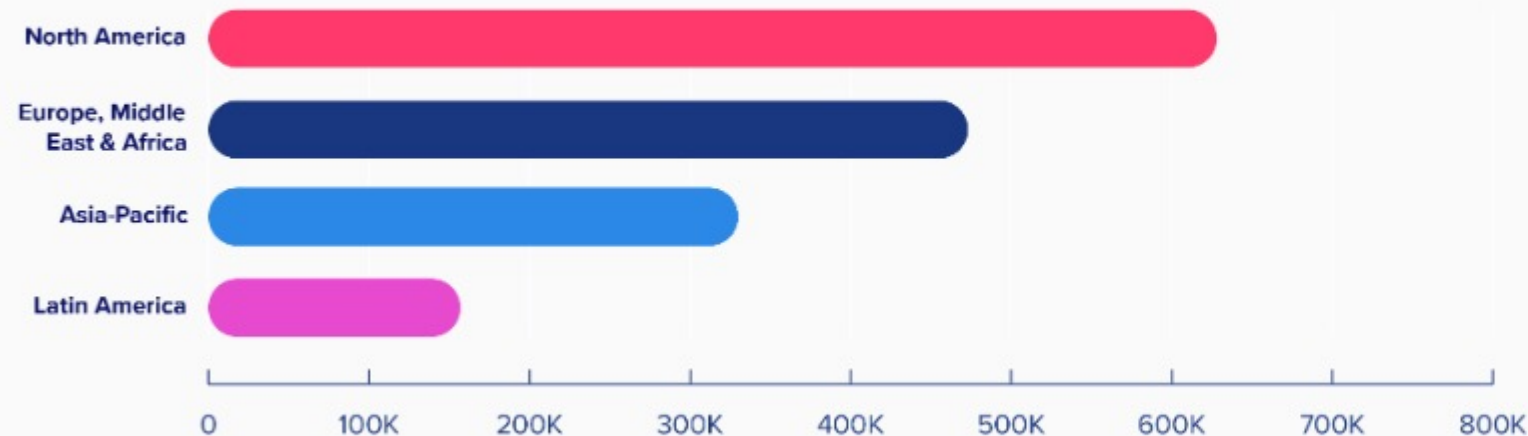
Estimated Industry Percent of Dollar per Vendor



Akamai, Amazon CloudFront, and Cloudflare are leaders of the pack by several measures, including revenue. The CDN space has a large number of smaller providers, but the top three vendors control nearly half of the market.

Regional Distribution of CDN Buyers by Location

Headquarters location of 2.1M CDN Buyers



Source: Intricate data, July 2020

INTRICATELY

Latin America experienced the largest increase in CDN buyers this past year with a massive 257% year-over-year (YoY) growth. This is related to a significant recent investment in the region from **data centers**, especially among media and entertainment sectors.

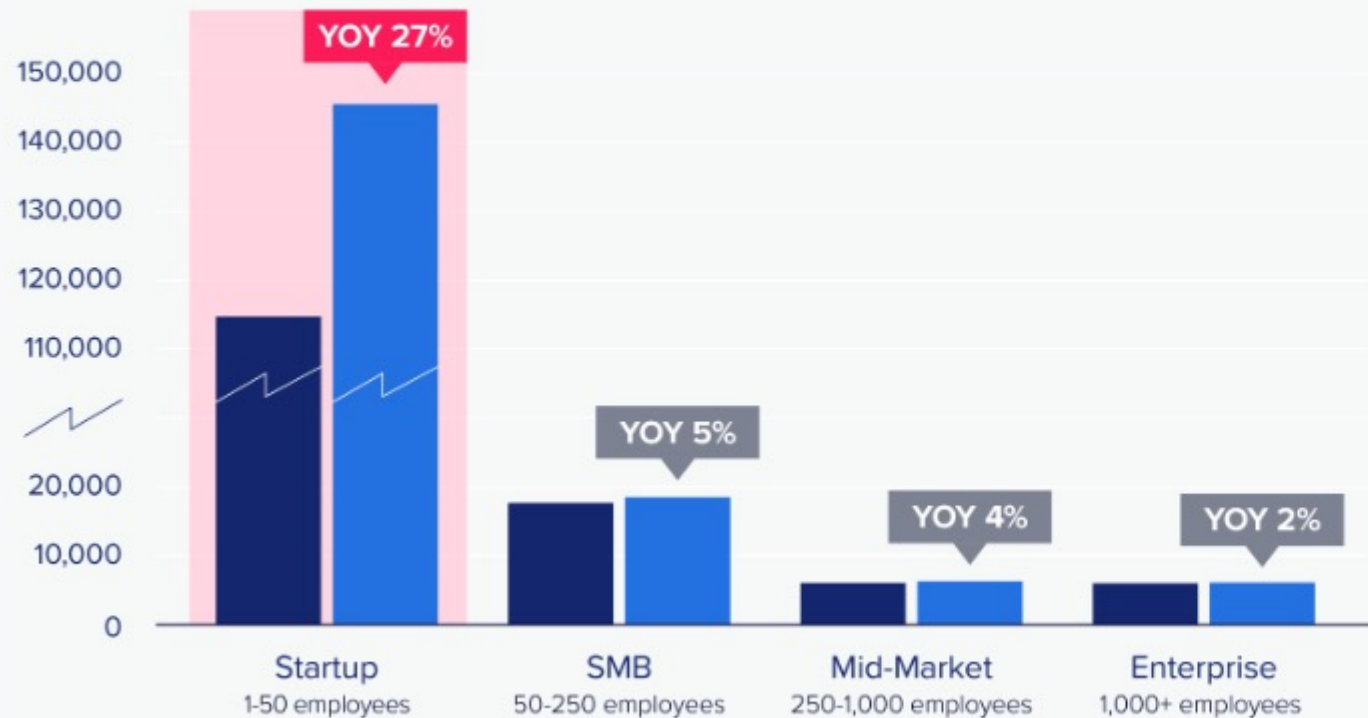
North America saw a 46% YoY increase, while the APAC region expanded by 39% and EMEA grew at 13%.

Multi-CDN usage is increasing

Multi-CDN Year-Over-Year Growth

Total Growth of CDNs By Customer Type

● Q2'19 ● Q2'20 YOY indicates year-over-year growth



Source: Intracately data, July 2020



Intracately data shows multi-CDN is growing, especially among startups. Enterprise, mid-market, and small businesses increased their multi-CDN usage by single digit percentages, but startups increased their multi-CDN vendor approach by 27%.

Cloud technology and lower prices are making multi-CDN a reality for startups.

This is a huge benefit for SMBs and startups because as they scale, their need for availability and redundancy increases. Having multiple CDNs allows organizations to load-balance, which improves the efficiency of traffic flow and reduces the risk of outages.

Thanks