

August 5, 2021

MPA REPORT: SOUTHEAST ASIA STREAMING MINUTES REACHED 1.2 TRILLION IN Q2 WITH PREMIUM VIDEO AT 10% SHARE, SVOD SUBS REACH A TOTAL OF 30 MILLION

(SINGAPORE, AUGUST 5, 2021) Southeast Asia (SEA) online video consumption across measured AVOD, SVOD, freemium and game streaming platforms topped 1.2 trillion minutes in Q2 2021, growing 6% Q/Q, according to a study published today by Media Partners Asia (MPA). The quarterly report, titled *Southeast Asia Online Video Consumer Insights & Analytics: A Definitive Study*, leverages MPA’s proprietary AMPD Research Platform to measure the video streaming economy in five Southeast Asian (SEA) markets: Indonesia, Malaysia, the Philippines, Singapore and Thailand.

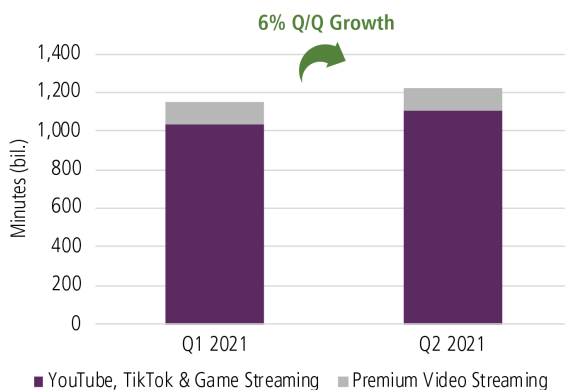
YouTube continues to lead online video with 65% share of total minutes streamed in Q2. TikTok is chipping away at YouTube’s lead, with a 23% share, up from 21% in Q1. Premium video platforms captured 10% of total online video consumption in Southeast Asia, led by Netflix with 40% share. Regional freemium platforms Viu (17%), WeTV (12%) and iQIYI (9%) remain strong along with local platforms such as Vidio in Indonesia.

The total Southeast Asia SVOD subscriber base reached a cumulative 29.6 million at end-Q2 2021, adding over 10 million new subscribers through 1H 2021. Disney leads SVOD growth, adding an estimated 3.6 million new paying subscribers in 1H. Disney+ Hotstar benefited from a strong launch in Thailand at end-June 2021 in particular. Viu has made significant strides in 1H, adding 1.9 million new subscribers and overtaking Netflix’s #2 ranking with a total 5.2 million paying subscribers in Southeast Asia. Viu’s subscriber growth was driven by Indonesia, the Philippines and Thailand.

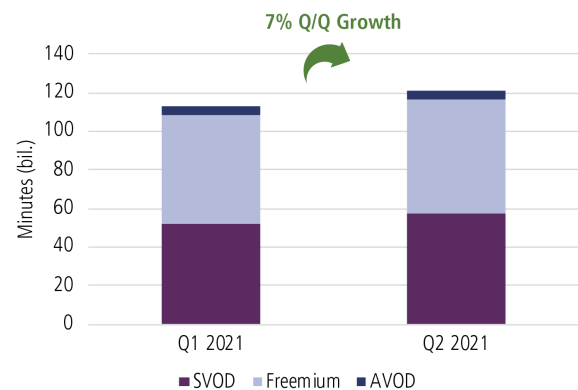
Commenting on the findings, MPA analyst Dhivya T said:

“Future SVOD category growth in the region over 2H 2021 will be determined by key platforms focusing on customer satisfaction and churn management with a new array of originals, Asian content and sports events set to launch in Q4. Meanwhile, we note that premium US and Korean content continues to drive subscriber acquisition while Japanese anime and long-tail Korean dramas have become ubiquitous across free tiers as reliable drivers of consumption. Local content drives ~20% of consumption in Indonesia and Thailand, with key players streaming local FTA dramas on AVOD. Use cases for local content as a lever for subscriber acquisition are emerging, especially with Thai content and certain premium originals in Indonesia. Premium Chinese content consumption has taken hold in Thailand, driven by the popularity of WeTV and iQIYI’s romance and period dramas.”

SEA ONLINE VIDEO STREAMING MINUTES



SEA PREMIUM VIDEO STREAMING MINUTES



Note: Premium Video excludes YouTube, TikTok & Game Streaming
Source: AMPD Research (Media Partners Asia)

About This Report & Methodology

This report is produced by Media Partners Asia (MPA) using its proprietary AMPD Research platform. AMPD used two key tools to conduct research & frame analysis:

I. Passive Measurement. The AMPD Vision® platform uses a permission-based panel of consumers who consent to the collection of their session-based activity. For this report, the platform passively measured real consumption on mobile devices across 5 SEA markets in Q2 2021. Sample size across Southeast Asia across active users reached 5,300 in Q2 2021. The data reported is anonymized and conforms to data privacy legislation in markets where the service operates including European Union's General Data Protection Regulation (GDPR) and the Republic of Singapore's Personal Data Protection Act (PDPA) which delivers parallel compliance in Asia-Pacific Economic Cooperation (APEC) member states. AMPD Vision® was used by MPA to provide a consolidated granular view of streaming media consumption across VOD services on mobile devices. Data from AMPD Vision® informs key metrics reported in this study including streaming minutes & consumption share by platform, genre and country of origin.

II. Consumer Survey. MPA used the results of a Consumer Survey, which serves as a VOD Profiling Study conducted continuously across Indonesia, the Philippines, Singapore and Thailand. Data is collected through an interactive online survey among internet users aged 15 years and above who use both mobile and/or home broadband. For this report, a sample size of 24,590 respondents completed a structured survey of mostly closed-end questions. Data from the Consumer Survey inform key metrics reported in this study including: (1) Socio-economic & demographic indicators by VOD platform; (2) Consumer spend on VOD services; and (3) Paying subscribers by VOD platform.

About Media Partners Asia (MPA)

Media Partners Asia (MPA) is the leading independent provider of research, advisory and consulting services across media, telecoms, sports and entertainment industries in the Asia Pacific and the Middle East. We provide customized research with strategic recommendations to help clients launch new products & services, enter new markets, as well as acquire and sell businesses. MPA reports are used and sourced by local, regional and global companies for strategic planning and equity & debt transactions. We also offer dedicated primary research through subsidiary AMPD Research to measure consumer behaviour across the digital economy, including online video and gaming. MPA also hosts the APOS Summit, the defining voice for the Asia Pacific media, telecoms, sports and entertainment industry.

For more details, visit www.media-partners-asia.com

About AMPD Research (AMPD)

AMPD Research is a leading media insights specialist, measuring and decoding consumer behaviour across the digital economy, including online video. AMPD has built a series of digital measurement panels using groundbreaking passive metering technology developed by UK technology firm, RealityMine. With passive measurement panels deployed across 10 markets in the Asia Pacific and Latin America, AMPD provides its clients with an unparalleled view into digital consumption habits across video, gaming, audio streaming, and e-commerce on smart devices and computers. As living room device consumption matures across many developing markets, the AMPD and RealityMine partnership is piloting new technology that will measure the total digital entertainment ecosystem by adding the measurement of smart TVs and set-top boxes in 2021.

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