

TAIWAN ONLINE VIDEO

CONSUMER INSIGHTS & ANALYTICS

Q2 2021

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DECODING ONLINE VIDEO IN TAIWAN

NAVIGATION

AMPD 
RESEARCH
BY MEDIA PARTNERS ASIA

METHODOLOGY

This Report 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 in Taiwan in Q2 2021 with sample size of 1,000+. The data reported is anonymized and conforms to data privacy legislation in Taiwan. AMPD Vision® was used by MPA to provide a consolidated granular view of streaming media consumption across global and regional VOD services on mobile devices. Data from AMPD Vision® informs key metrics reported in Sections I & II of this study.

II. Consumer Survey. MPA used the results of a Consumer Survey, which serves as a VOD Profiling Study conducted continuously in Taiwan. Data is collected through an interactive online survey among internet users aged 15 years and above who use both mobile and / or home broadband. Respondents are sampled according to representative quotas for age, gender and regions corresponding to AMPD Research's online universe estimates modelled using official government statistics and MPA analysis. The samples are sourced using AMPD Research's proprietary online panels, pre-screened for actual VOD consumption. For this report, a sample size of 4,076 respondents completed a structured survey of mostly closed-end questions. Data from the Consumer Survey informs key metrics reported in Section III of this study.

Key Metrics:

- Monthly Active Users (MAUs) tracks unique platform users based on a 1 second reach criteria.
- Net Promoter Score (NPS) is a widely used tool to gauge customer loyalty and as a proxy for customer satisfaction. The NPS is calculated on a scale of 0 - 10 in response to the question: "How likely is it that you would recommend to a friend or colleague?". Scores of 0 - 6 are considered "detractors", 7 - 8 are "passives" and 9 - 10 are classified as "promoters". The final Net Promoter Score is calculated by subtracting the percentage of customers who are "Detractors" from the percentage of customers who are "Promoters."

KEY HIGHLIGHTS

An outbreak of new COVID cases resurfaced in Q2, driving local residents to re-adopt work-from-home lifestyle. Online video became a key source of entertainment among self-isolators and stay-at-home families, boosting consumption during the quarter. Total OTT streaming minutes measured across AVOD, SVOD and live streaming platforms increased to ~53 bil. in Q2 2021 vs >50 bil. in Q1, representing a ~2.3 bil. net quarterly growth in minutes.

YouTube, Line TV and Yahoo TV lead consumption. YouTube led the online video category with a 70% share as MAUs reached 16 mil. versus 14 mil. in Q1. AVOD player Yahoo TV and freemium platform Line TV were in second and third place respectively in Q2 with a 7% and 3% share of streaming minutes. TikTok contributed 3% of total streaming minutes in Q2, while game streaming platforms such as Discord, Twitch, Douyu and Huya contributed 2%. Netflix had 1% of total streamed minutes in Q2 but more than 80% of consumption across the pure play SVOD category.

Total streamed minutes across SVOD & freemium categories reached ~10 bil. in aggregate during Q2, with pure play SVOD platforms contributing ~2 bil., or 16% of the pie, led by Netflix with Catchplay a distant number 2. In the freemium category, Line TV, LiTV and iQIYI Taiwan were the most streamed services. Combined streaming on AVOD / freemium (incl. Yahoo TV, ex. YouTube) and SVOD categories totaled ~14 bil. minutes in Q2.

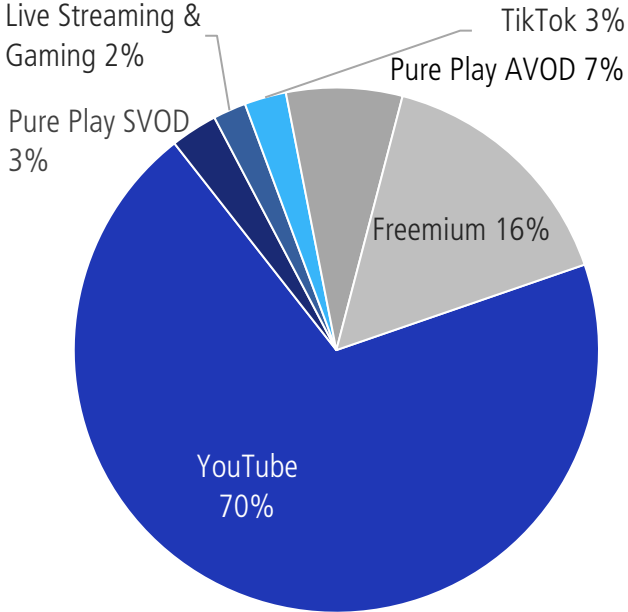
SVOD adoption continues to grow with total paying subs reaching 3.4M in Q2 2021 versus 3.0M in Q1 with the average HH subscribing to 2.9 services. Netflix leads with a 19% share of pay subs, followed by iQIYI Taiwan (10%), Friday (9%), MyVideo (9%) and KKTV (7%). Netflix's continued growth is due to its increasing focus on Asian content offerings (i.e. Korean and Japanese, local Taiwanese and Chinese content), while consumption of US content and originals remains strong. iQIYI's growth remains driven largely by Chinese and Korean dramas.

During the quarter, promotional offerings that granted free 14-30 day access to premium content were launched by multiple SVOD platforms such as Friday, MyVideo, KKTV, Line TV and CatchPlay+. These promotions were intended to help limit community spread of COVID by encouraging people to consume content at home. Most platforms that offered such promotions were able to grow their premium base by the upselling and gifting of TVOD vouchers. Other key gainers include LiTV, Gt TV, Hami Video+ELTA OTT TV, each offering new plans and content to target families, concert loyalists and Olympics fans.

YOUTUBE DRIVES OVERALL CONSUMPTION WHILE NETFLIX LEADS PURE PLAY SVOD

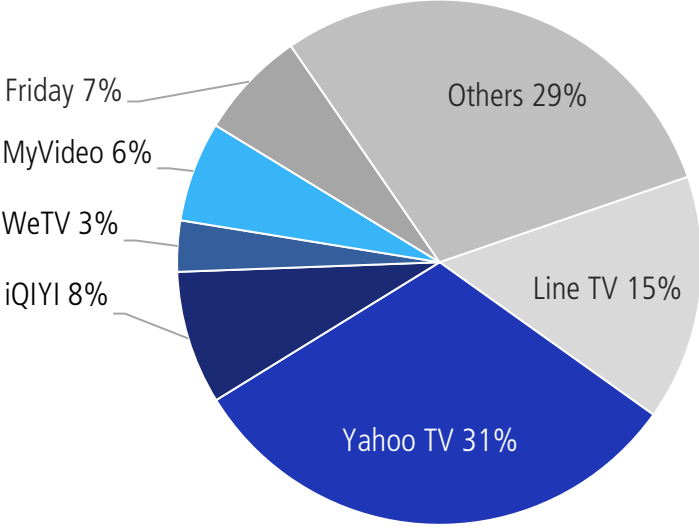
SHARE OF TOTAL STREAMING MINUTES (Q2 2021)

TOTAL MINUTES STREAMED: **53 BIL.**



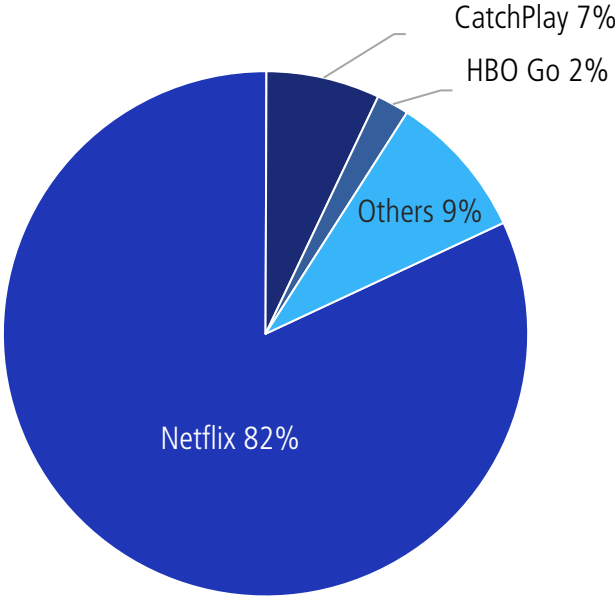
SHARE OF AVOD/FREEMIUM STREAMING MINUTES (Q2 2021)

TOTAL MINUTES STREAMED: **12 BIL.**



SHARE OF PURE PLAY SVOD STREAMING MINUTES (Q2 2021)

TOTAL MINUTES STREAMED: **2 BIL.**



Source: AMPD Research, Q2 2021

ABOUT MEDIA PARTNERS ASIA

Media Partners Asia (MPA) is the leading independent provider of research, advisory and consulting services across media, telecoms, sports and entertainment industries in Asia Pacific. 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 and global platform for the Asia Pacific media & telecoms industry.

ABOUT AMPD

Launched in 2019, AMPD Research is platform that uses passive measurement to provide actual customer behaviour data and insights across the online landscape in Asia Pacific. AMPD specializes in measurement and insights across streaming video, telecoms, music and gaming sectors with coverage across 12 markets including Australia, Brazil, Indonesia, Japan, Korea (South), Malaysia, Philippines, Singapore, Taiwan and Thailand with India and Vietnam to commence in Q4 2021. The platform collects data from nationally representative panels with the AMPD passive audience meter installed on consumer smart devices. AMPD panels are 100% opt-in and compliant with all major data protection and privacy regulations including GDPR and PDPA. As well as capturing title level consumption in streaming video, AMPD Research also appends all content with key category fields to improve analytics for supply and demand analysis across all measured online video services.

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