

November 22, 2021

SOUTHEAST ASIA SVOD REACHES 33M TOTAL SUBS IN Q3 2021

DISNEY, VIU & NETFLIX LEAD THE REGION IN TERMS OF SUBS

TIKTOK EATS INTO YOUTUBE CONSUMPTION SHARE

NETFLIX LEADS PREMIUM VOD CONSUMPTION WITH FIERCE COMPETITION FOR SECOND PLACE AS WETV TOPS THAILAND

(SINGAPORE, NOVEMBER 22, 2021) Southeast Asia (SEA) online video consumption topped 1.25 trillion minutes across measured AVOD, SVOD, freemium and game streaming platforms in Q3 2021, an increase of 3% Q/Q, according to a study published today by Media Partners Asia (MPA). The quarterly report, titled **Southeast Asia Online Video Consumer Insights & Analytics**, leverages MPA's proprietary AMPD Research Platform to measure the video streaming economy in five Southeast Asia markets.

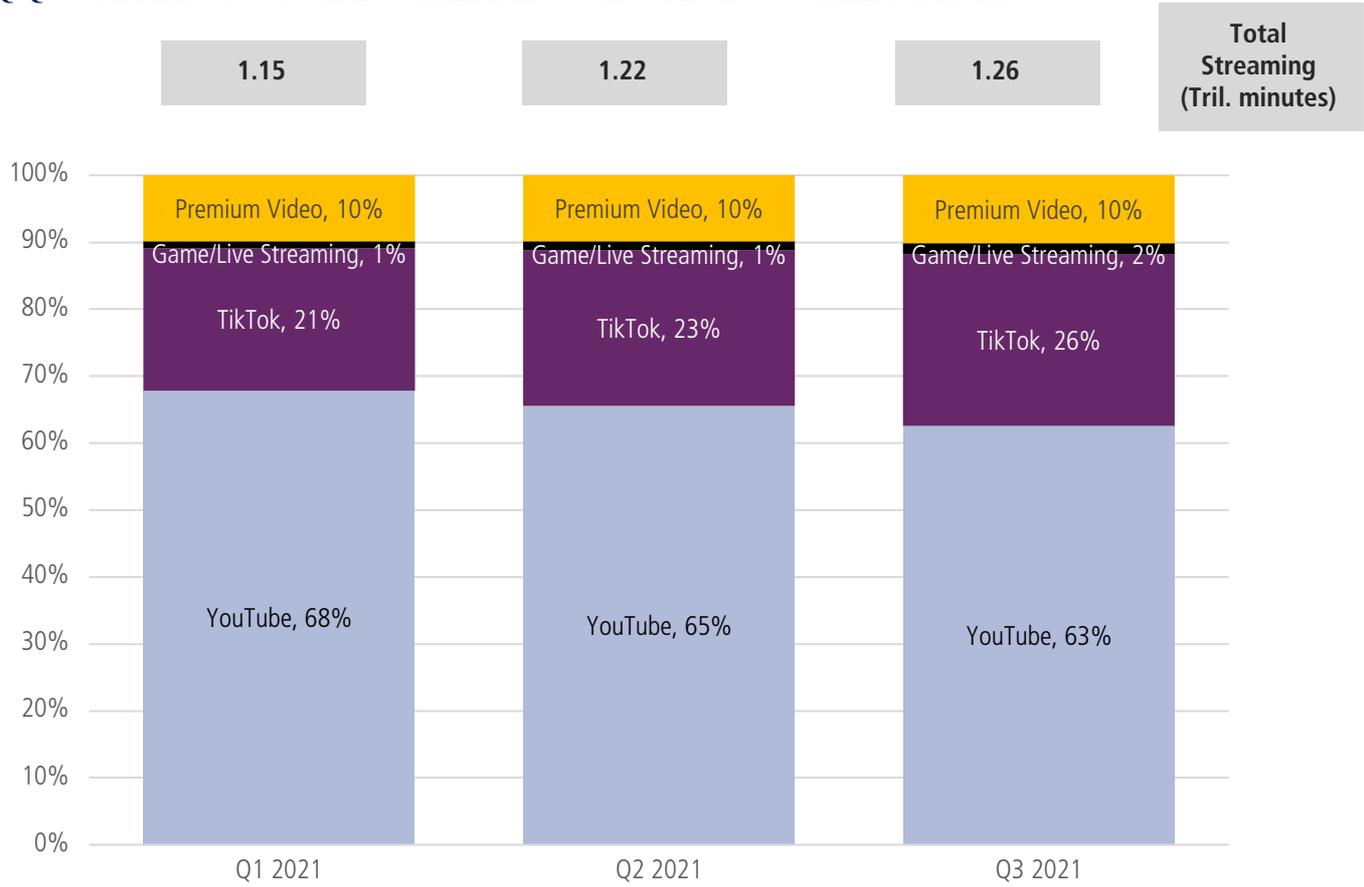
YouTube continues to lead the overall online video category with a 63% share of total minutes streamed. TikTok has taken 5% share of SEA streaming minutes directly from YouTube through 2021 to reach 26% share at end-Q3 2021. TikTok has 156 mil. MAUs in SEA's five markets with a large presence in Indonesia (more than 70% of YouTube's reach). Premium video streaming grew 6% Q/Q in Q3, capturing 10% of total video consumption SEA. Netflix retains a strong lead with 39% of premium video streaming minutes in Q3. Regional VOD platforms Viu, WeTV and iQIYI compete for #2. Disney+ / Disney+ Hotstar has doubled its share of premium video streaming minutes with improved engagement in Indonesia and Malaysia and a strong start in Thailand. The addition of original and licensed Korean and Japanese titles in Q4 and beyond is expected to grow platform engagement.

Disney led SVOD subscriber growth in Q3. Thailand generated 75% of Disney's new subs, owing to strong local brand-awareness and launch momentum which carried into Q3. Disney closed Q3 with more than 7 mil. subs, leading the SEA SVOD market. Viu is a close #2, ending Q3 with an estimated 6.1 mil. subscribers in SEA. Viu's growth is anchored to telco integrations, along with the popularity of exclusive and premium Korean dramas and variety. Amongst local players, Vidio ended Q3 with approx. 2 mil. subs in Indonesia, driven by the return of key live sports in Q3 and original dramas. WeTV crossed the 1 mil. mark in SEA in Q3, driven by: (1) Chinese dramas in Thailand and (2) Popular local originals in Indonesia, which has started to attract subscribers.

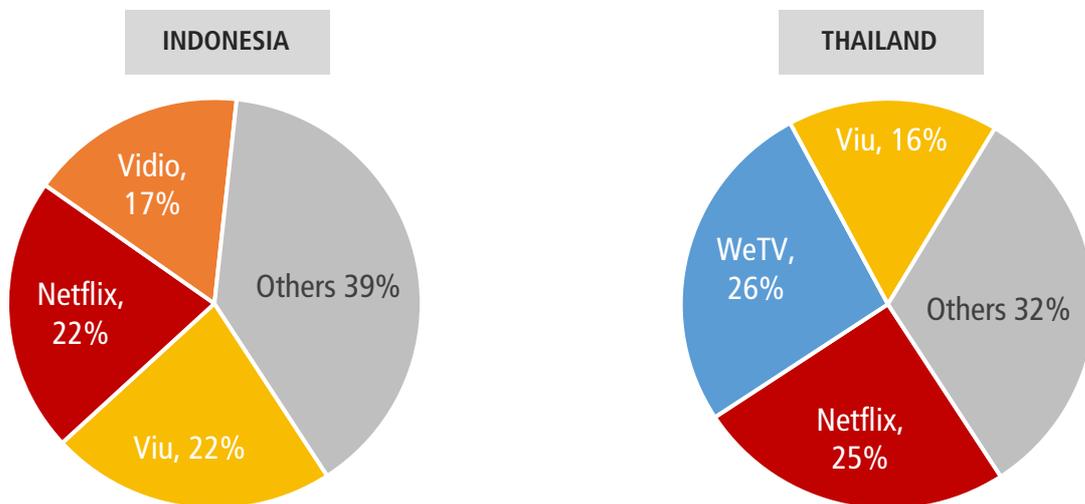
Commenting on the findings, MPA analyst Dhivya T noted:

“Thailand and Indonesia are the region's most competitive premium video markets. In Thailand, WeTV edged out Netflix to lead premium video streaming as the popularity of premium and library Chinese dramas soars in the market. In Indonesia, Viu and Netflix compete for #1 while Vidio, leveraging local FTA, sports and originals, follows closely behind. Thailand has also emerged as a competitive and dynamic SVOD market. Thai SVOD subscriptions grew 16% Q/Q to reach 11.3 mil. in Q3 2021. Strong mobile and home broadband connectivity, increasing propensity to pay, the presence of local aggregators and the rise of Chinese content, powered by WeTV and iQIYI, along with demand for premium local content online has created new competition and growth for streamers.”

Q/Q COMPARISON OF VIDEO STREAMING MINUTES IN SOUTHEAST ASIA



TOP 3 PLATFORM'S SHARE OF PREMIUM VIDEO STREAMING MINUTES (Q3 2021)



Source: AMPD Research

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 Q3 2021. Sample size across Southeast Asia across active users reached 6,141 in Q3 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 37,003 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)

Launched in 2019, AMPD Research is platform that uses passive measurement to provide actual customer 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 14 global markets 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.

Contact

Lavina Bhojwani

VP & GM

Media Partners Asia

E: lavina@media-partners-asia.com

###