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## Southeast Asia Online Video Consumer Insights & Analytics Report, 1H 2023

- **Viu, Amazon & Netflix Grow Subscriptions Amidst Broad Market Slowdown**
- **Korean, Local, US and Asian Content Continues to Drive Premium VOD Category Viewership & User Acquisition**
- **TikTok Drives Viewership Growth in SEA**

**(SINGAPORE, August 2, 2023)** The Southeast Asia (SEA) region added only 7,000 net new SVOD subscriptions in 1H 2023, a marked slowdown from more than 7.0 million net new additions in 2H 2022 and 3.7 million net adds in 1H 2022, according to Media Partners Asia's (MPA) latest ***Southeast Asia Online Video Consumer Insights & Analytics*** report. The report tracks key metrics across the online video category with fused passive and establishment panels operated by MPA subsidiary AMPD in five SEA markets: Indonesia, Malaysia, the Philippines, Singapore and Thailand.

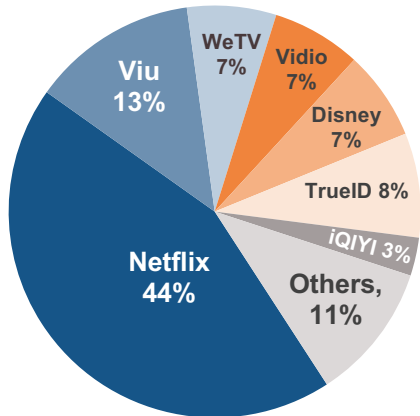
SEA had 47.6 million SVOD subscriptions at the end of 1H 2023, flat in comparison with year-end 2022. Subscriber growth in Thailand, Malaysia and the Philippines was offset by contraction in Indonesia, where total subscriptions fell by 1.2 million. The report attributes the SVOD slowdown in 1H 2023 to a combination of factors including: (1) Subscriber churn in Indonesia following the end of the FIFA World Cup football tournament in December 2022 and the end of the 2022-23 Premier League season in May 2023; (2) The impact of significantly reduced local marketing and content investment outside of Netflix, Prime and Viu, who all contributed to regional growth in 1H 2023 and the result of price increases implemented by key platforms.

Offsetting the decline from contracting platforms, Viu, Amazon Prime Video, and Netflix added an aggregate 1.2 million customers, accounting for 63% of new subscriptions among growing platforms. All three tap into the popularity of Korean dramas, the single largest content category in SEA premium VOD. 53% of premium VOD users streamed some Korean content, capturing 40% of premium VOD viewership in SEA in 1H 2023. Strong exclusive slates from Netflix and Viu drove demand, with *The Glory* (Netflix) and *Taxi Driver S2* (Viu) leading. All leading premium VOD services are also investing in Southeast Asian content, with 50% of SEA's premium VOD audiences viewing local content in 1H 2023. Thai content has the strongest regional impact, with Netflix's thriller movie *Hunger* topping regional travelability in 1H 2023.

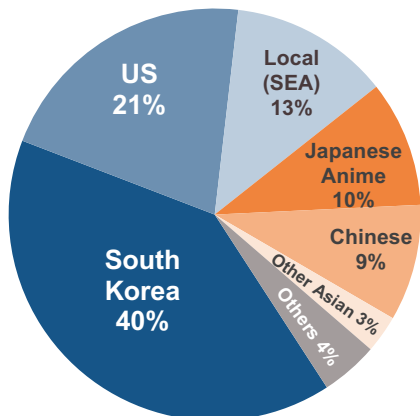
On the outlook for growth in SEA, MPA executive director Vivek Couto commented:

"The region's leading premium VOD platforms are in the midst of a shift towards quality customer growth, retention, and monetization. Netflix has reduced prices and introduced member sharing measures while Disney has raised prices in Indonesia and Thailand in an effort to build low-churn, high ARPU customer bases. We expect Vidio in Indonesia to pick up subscribers with the return of Liga 1 and the Premier League in 2H, along with impactful local slates from Netflix and Amazon, particularly in Thailand and Indonesia, attracting new subscribers, while Viu will continue to benefit from its Korean output. In the larger online video landscape, TikTok is increasingly a major driver of viewership growth on mobile and web platforms, responsible for over 70% of growth in streaming minutes over the past 2 years. TikTok captured 42% of video streaming minutes in 1H 2023, a massive 20-point increase over 1H 2021 and 7-point increase from 1H 2022. While overall engagement is growing, TikTok's rise has reduced shares for YouTube (-4%) and Premium VOD (-2%) Y/Y."

### SEA Premium VOD Viewership by Platform (1H 2023)



### SEA Premium VOD Viewership by Content Type (1H 2023)



Note: Premium VOD excludes YouTube, TikTok & Game Streaming  
Measurement includes all mobile and web, excludes CTV.  
Source: AMPD Research, Media Partners Asia

## About AMPD Research

Launched in 2019 by MPA, AMPD provides businesses with valuable customer insights through real customer behaviour. Using our unique technology and sizable customer panel solutions, we collect data on how customers interact with brands and content across various touchpoints, from app & website visits to in-store purchases with detailed title level consumption. AMPD data drives insights that help businesses optimize strategies, including customer acquisition, content creation, monetization and marketing campaigns.

Across the 13 markets in which we operate, AMPD leverages more than 60,000 passively measured panel members. We have proven use cases across online video, advertising, connectivity as well content creation and acquisition. AMPD won the Best International Media Research Award at the 2023 UK Mediatel Media Research Awards, which recognizes organizations driving innovation in research.

## About Media Partners Asia

Established in 2001, our mission is to serve companies focused on the creation, distribution and monetization of content, connectivity, data and related services across Asia Pacific. We provide definitive reports with proprietary industry models and forecasts. Our reports are widely used and sourced by local, regional and global companies for business planning, market strategy and capital market transactions.

MPA uses its deep strategic and operational knowledge of local markets to support corporate strategies driving growth. Our local market expertise provides clients with detailed country-level insights across media and telecoms, tracking key commercial and regulatory dynamics with relevant due diligence and strategy recommendations. We offer customized services to guide strategic planning and business development activities and support the launch of new products and services.

## Contact

Lavina Bhojwani, [lavina@media-partners-asia.com](mailto:lavina@media-partners-asia.com)

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