

August 5, 2022

TIKTOK ASCENDANT IN SOUTHEAST ASIA WITH 37% SHARE OF ONLINE VIDEO CONSUMPTION IN Q2 2022, UP 14 POINTS Y/Y.

SOUTHEAST ASIA TOPS 40M SVOD SUBSCRIPTIONS AS GROWTH MODERATES ACROSS THE REGION; INDONESIA'S VIDIO & DISNEY+ HOTSTAR LED NET ADDS.

(SINGAPORE, Aug 5, 2022) Southeast Asia (SEA) online video consumption across measured AVOD, SVOD, freemium and game streaming platforms reached nearly 1.6 trillion minutes in Q2 2022, with YouTube and TikTok going head-to-head, 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 AMPD Research Platform to measure online video in five SEA markets.

While YouTube remains a behemoth, capturing 54% of online video consumption, TikTok gained 14 points Y/Y to drive 37%, eating into YouTube (-11 points) and premium video's (-1) share. At 173 million MAUs, TikTok is fast catching up to YouTube's 224 mil. user reach in the region. Premium video consumption softened in Q2, with major players platforms maintaining share relative to Q1. Netflix continues to lead the across the Philippines, Malaysia and Singapore while Vidio remains the market leader in Indonesia for the second consecutive quarter.

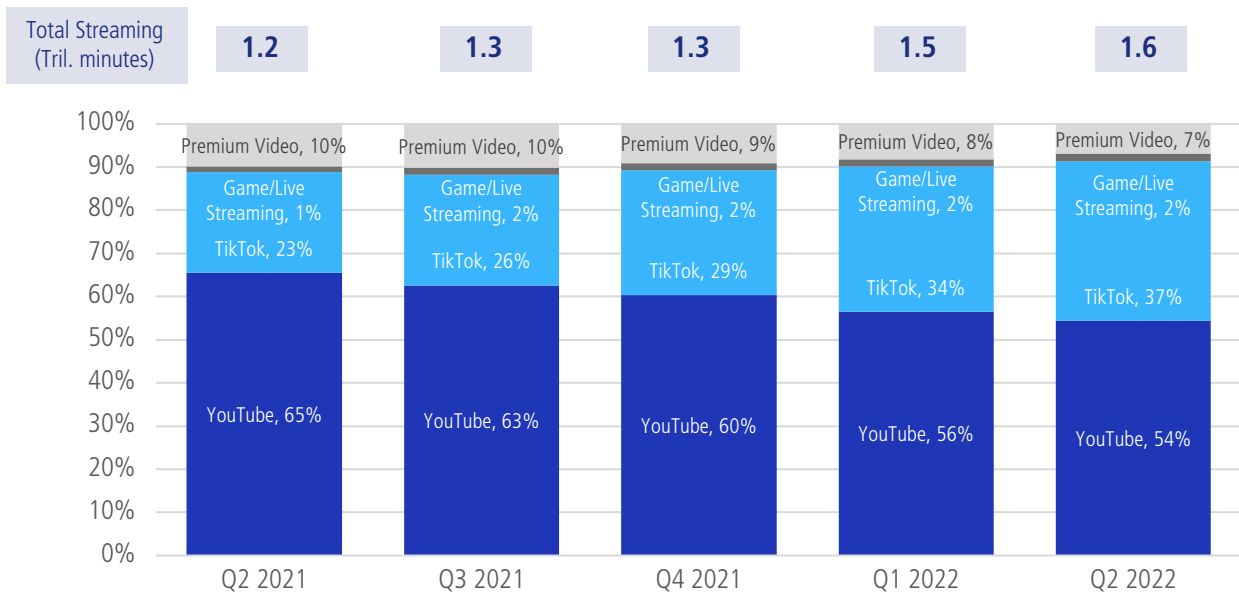
The total SEA subscriber base topped 40 million at end-Q2 2022. Vidio and Disney+ Hotstar drove category growth, though MolaTV's decline in Indonesia and a regional slowdown offset some gains. Indonesia and Thailand remain SEA's two scaled VOD markets, maintaining an aggregate 75% of SVOD subscriptions in the region.

Three leading platforms – Disney, Netflix and Viu– account for 54% of total subscriptions. Disney leads with approximately 8.5 million customers. Disney's 2022 Korean slate has been impactful, while Marvel and kids remain important. Vidio had a record quarter to reach approximately 3.5 million subscribers, becoming the second largest SVOD operator in Indonesia in terms of subscribers after Disney+ Hotstar. Q2 growth was driven by Vidio's strengthened local originals slate, key sports and the movement of more content to the paid tier.

Commenting on the findings, MPA analyst and head of content insights Dhivya T said:

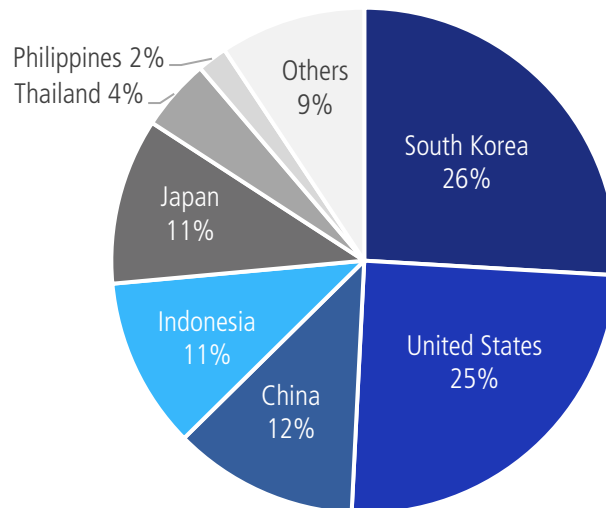
“Competition for consumer time heightened in Q2 2022 with the return of live events and travel. Demand for US, Korean and local content continues to drive the premium category with Vidio's 2022 local slate a clear standout success in driving subscriber growth. US and Korean content powered over 50% of premium video demand though Korean was down 5% Q/Q as key Netflix releases failed to breakout, and US hits (i.e. Netflix's Stranger Things, key Disney franchises) as well as local content took over viewership. Local series, particularly in Indonesia and Thailand remain central to creating platform buzz and consumption, with breakout titles such as My Lecturer My Husband S2 (WeTV), KinnPorsche (iQIYI), Dear Dosenku (Vidio) and Pretty Little Liars (Viu) impactful in Q2. The expansion of Amazon Prime Video in August 2022 and potential Q4 2022 launch Disney+ Hotstar in the Philippines, along with the release of local originals from Netflix and others could reaccelerate demand the premium video content category in 2H 2022.”

TOTAL ONLINE VIDEO STREAMING BY CATEGORY IN SOUTHEAST ASIA



Source: Media Partners Asia, AMPD Research

SOUTHEAST ASIA PREMIUM VIDEO CONSUMPTION BY CONTENT ORIGIN (Q2 2022)



Note: Aggregates key SVOD, AVOD & freemium platform consumption in five SEA markets.

Source: Media Partners Asia, AMPD Research

About AMPD Research (AMPD)

Launched in 2019 by MPA, AMPD Research 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 13 global markets. The platform collects data from nationally representative panels with the AMPD passive platform 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 content analysis across all measured online video services. AMPD use cases are also developing across Advertising, Content Testing and Connectivity.

About Media Partners Asia (MPA)

Media Partners Asia (MPA), established in 2001, is a leading independent provider of advisory, consulting and research services, focusing on media and telecoms in Asia Pacific and the Middle East. MPA also operates AMPD, launched in 2019. AMPD measures digital activity in 13 global markets using proprietary software, focused on video, content, advertising and connectivity sectors with detailed consumer and content insights. MPA has been involved in due diligence for M&A activity in APAC with numerous local and cross border transactions while also operating as an IC (Independent Consultant) in the IPOs of media and telecoms companies. MPA hosts and operates APOS, the leading annual summit for Asia's TMT industry with global impact.

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

Contact

Lavina Bhojwani

VP & GM

Media Partners Asia

E: lavina@media-partners-asia.com

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