

November 3, 2021

MPA REPORT: SVOD & BVOD PLATFORMS CAPTURE 26% OF TOTAL STREAMING CONSUMPTION IN AUSTRALIA; NETFLIX RETAINS LEAD IN CONSUMPTION & SUBSCRIBERS

Key Highlights

- Premium video streaming reached 20 bil. minutes in Jan-Sep 2021, capturing 26% of total online video streaming.
- SVOD platforms accounted for ~70% of premium video streaming; BVOD platforms took 30%.
- Australia topped 19 mil. SVOD subscriptions as of September 2021. Netflix leads with 33% market share while Disney+ and Amazon Prime Video compete for #2 at 15% each.
- Stan and Foxtel are local streaming leaders. Foxtel's Kayo is Australia's largest sports SVOD.

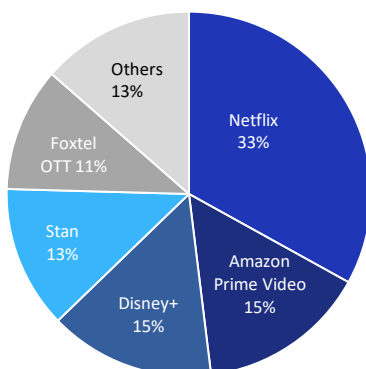
(SINGAPORE, November 3, 2021) Australians streamed 20 billion minutes of premium online video* in Jan-Sep 2021, according to a report from Media Partners Asia (MPA) measuring the Australian streaming economy. SVOD platforms drove 70% of premium video streaming, while BVODs took 30%. The report, titled *Australia Online Video Consumer Insights & Analytics*, leverages MPA's proprietary **AMPD Research Platform** to measure and analyse streaming media consumption across key VOD services on iOS and Android mobile and PC devices.

The report indicates that SVOD subscriptions reached 19.4 mil. at end-September 2021. Netflix retains its #1 position with 33% share of subs and a strong lead in consumption share. Amazon Prime Video and Disney+ compete for second place with 15% share of subscribers each. Disney+ outperforms Amazon in consumption share, benefiting from the introduction of Star general entertainment content this year.

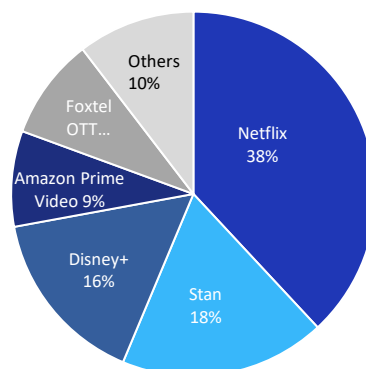
Commenting on the report's findings, MPA Executive Director Vivek Couto said:

“Australia's subscription streaming market is maturing at 60% household penetration. New entrants will need to win market share from incumbents and consider freemium models with strong local partnerships. The importance of sports continues to grow with four major players led by Foxtel's Kayo competing for subscribers and audience loyalty. The overall sports segment accounted for almost 15% of the total SVOD customer base at end-Sept. 2021”

SHARE OF SVOD SUBSCRIBERS (SEP 2021)



SHARE OF SVOD STREAMING MINUTES (JAN-SEP 2021)



Source: AMPD Research

Note: (1) *Premium video excludes YouTube, TikTok, game and livestreaming platforms. (2) Foxtel OTT subs include Kayo, Binge and Foxtel Now; consumption includes Kayo & Binge. (3) Others include Apple TV+, beIN Sports Connect, Hayu, Optus Sport, Paramount+ and other niche entertainment & sports apps.

Australia had 19.4 mil. SVOD subscriptions at end-Q3 2021, representing 60% household penetration based on an average number of 3.5 SVOD services subscribed per household. The market is maturing.

- **Netflix** commands a third of all SVOD subscriptions and 38% of SVOD consumption. A deep library of US original and acquired English language comedy and drama series is a key draw for Australians.
- **Disney+** captures 15% of SVOD subs and 16% of SVOD category consumption. The launch of the Star tile in February has boosted Disney's consumer proposition with the introduction of GE series and movies from Fox, ABC and others.
- **Amazon Prime Video** is growing rapidly with 15% share of the SVOD base though under-indexing on consumption. Subscriptions are linked to Amazon's free shipping service. Prime's library of acquired US and UK dramas, procedural series and movies drive consumption.
- **Nine Entertainment's** local GE & sports SVOD service **Stan** has 13% of SVOD subs and 18% of category consumption. Stan maintains important output deals with ViacomCBS and NBCU while original content is a key differentiator. **Stan Sport** has exclusive rights to the Champions League and Rugby Championship. ~15% of Stan subs have taken up Stan Sport, which is offered as a A\$10 add-on.
- **Foxtel's** OTT services (Kayo, Binge and Foxtel Now) have grown rapidly for a 11% SVOD subs share. **Kayo's** SVOD base reached 1.2 mil. at end-Sept and the platform is Australia's largest sports SVOD platform with streaming rights to ~50 sports and 13 live channels. Prominent rights include the NRL and AFL. **Binge** has output deals with NBCU and HBO. HBO titles are a key draw. Kayo and Binge capture 9% of SVOD streaming minutes.

About This Report & Methodology

This report, entitled *Australia Online Video Consumer Insights & Analytics* leverages MPA's proprietary AMPD Research Platform to evaluate consumer behavior and usage patterns across VOD media services in Australia. The report includes analysis and profiles of 11 unique OTT video platforms focusing on paying subscribers, monthly active users, streaming minutes, average daily time spent, viewer profiles and demographics. The platforms are YouTube, Netflix, Disney+, Amazon Prime Video, Stan, Optus Sport, Binge, Paramount+, 7plus and 9Now. Title-level analysis, including country of origin and genre split, and viewership by age and gender demographics are provided for Netflix, Disney+ and Amazon Prime Video. The report will be updated quarterly. MPA also releases studies using the AMPD Research Platform that feature other APAC regions and markets such as Southeast Asia, South Korea, Japan, and Taiwan.

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 iOS and Android mobile and PC devices in Australia between January to September 2021 with a sample size of more than 3,000 users sourced from our in-market research partner RoyMorgan.

The data is anonymized and conforms to data privacy legislation in Australia. AMPD Vision® was used by MPA to provide a granular view of streaming content consumption across key VOD services on mobile devices.

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 hosts the APOS Summit, the defining voice for the Asia Pacific media and telecoms 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 globally, 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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