

TAIWAN ONLINE VIDEO

CONSUMER INSIGHTS & ANALYTICS

Q4 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 Q4 2021 with sample size of 1,302. 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 1,000 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 HIGHLIGHTS

Total consumption across measured AVOD, SVOD and live streaming platforms reached 45 bil. minutes over Q4 2021. YouTube maintained its lead with 63% share of streaming minutes and 15 mil. monthly active users (MAUs).

Premium video platforms captured 33% of total streaming minutes in Q4 2021. Within premium video streaming, SVOD's share expanded to 16%, up from 10% in Q3 2021, driven by the growth of Netflix and the launch of Disney+ in November 2021. Freemium services remained dominant in Taiwan, taking up 64% of premium video streaming while AVOD platforms contributed 20% share. Eight key players had an aggregate ~81% share of premium video consumption – Yahoo TV (19%), Line TV (16%), LiTV (11%), Netflix (10%), iQIYI (7%), FriDay (6%), MyVideo (6%), KKTV (6%).

Total SVOD paying subs reached 4.1 mil. at the end of Q4. Netflix is the clear leader with ~21% share of paying subs, while regulatory constraints capped growth on mainland China-operated iQIYI (9% share). Other key players that gained subscriber share in Q4 include FriDay (9%), MyVideo (8%), KKTV (7%), and Disney+ (7%). The Taiwanese SVOD market remains fragmented with over a dozen platforms competing for subscriber share.

Korean, Chinese and local dramas drive consumption and subscriber growth on Netflix and iQIYI while Disney's kids and Marvel franchises drive early demand. Netflix's acquired and original Korean dramas generated 26% of platform consumption, with demand across romance, comedy and thriller genres. Netflix's international originals from the US, UK, Korea, Japan and Taiwan performed strongly, helping to drive 37% of consumption in Q4. While 85% of iQIYI consumption was fueled by Chinese and Korean dramas, local originals are gaining share.

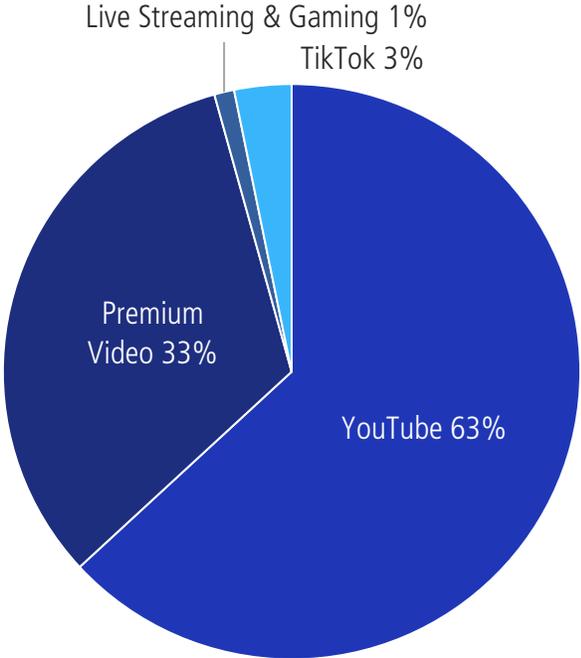
Netflix & iQIYI found local content success in Q4 2021 with key originals gaining significant traction. Netflix's original drama Light The Night was a hit in Taiwan with two seasons released in Nov and Dec 2021. The title continues to draw fans in 2022 with a third season. Netflix acquired PTS dramas also draw strong viewership. iQIYI's two local originals – Danger Zone and Rainless Love In A Godless Land – have also been hits, ranking among the Top 10 streamed titles on iQIYI in Q4. Local content share of streaming on Netflix and iQIYI has grown from 7-10% in Q3 to 12-15% in Q4 as a result.

The Taiwanese VOD audience is evenly split between male (49%) and female (51%). The 45+ age group is the largest segment, representing 53% of Taiwan's VOD audience. 15–34-year-olds make up 28% of the country's VOD audience, with 35-44s accounting for the remaining 19%. 93% of Taiwan's VOD homes use smartphones to stream video. Computers, tablets and smart TVs are the next most popular devices with 66%, 31% and 23% penetration, respectively.

YOUTUBE LEADS CONSUMPTION; YAHOO TV & LINE TV LEAD PREMIUM SEGMENT

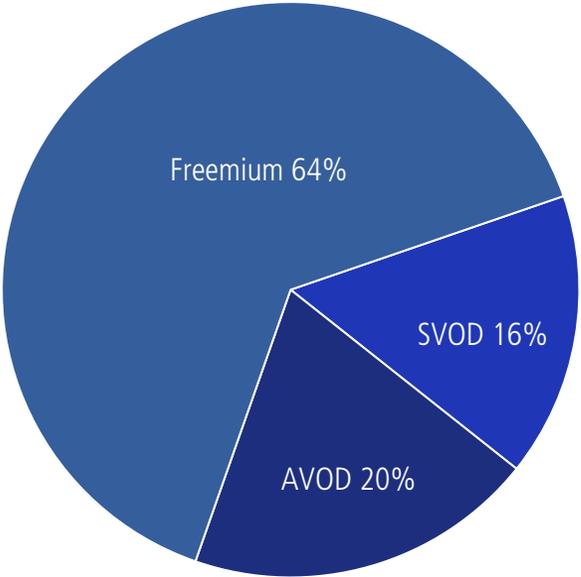
SHARE OF TOTAL STREAMING MINUTES (Q4 2021)

TOTAL MINUTES STREAMED: 45 BIL.

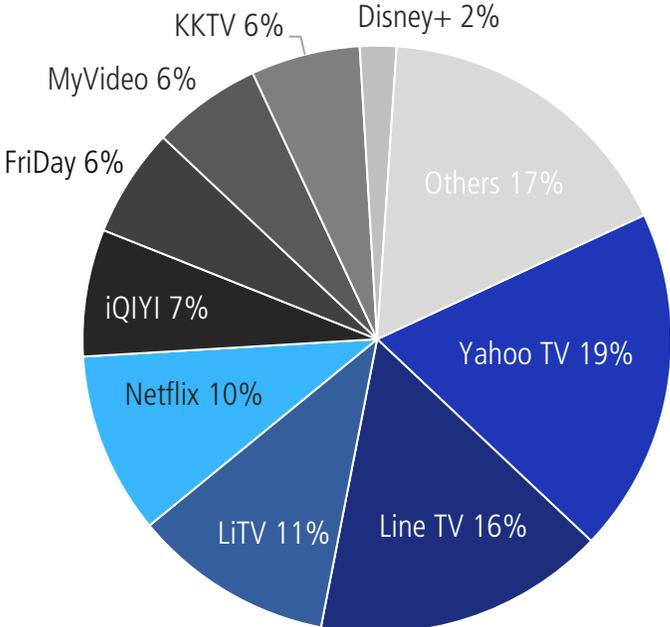


SHARE OF PREMIUM VIDEO STREAMING MINUTES (Q4 2021)

TOTAL MINUTES STREAMED: 15 BIL.



BY MODEL



BY PLATFORM

Note: Premium Video includes AVOD, SVOD, and freemium platforms, and excludes YouTube and TikTok.
 Source: AMPD Research, Q4 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 hosts the APOS Summit, the defining voice and global platform for the Asia Pacific media & telecoms industry.

ABOUT AMPD

Founded by Media Partners Asia (MPA) in 2019, AMPD captures real consumer data to provide deep insights across the digital ecosystem with a focus on the fast growing digital content, connectivity and advertising sectors. AMPD has a footprint across 12 international markets and is the only global platform with available title-level reporting for streaming platforms capturing all consumption.

AMPD uses passive measurement and proprietary software to measure consumer behaviour and generate reliable app / platform metrics across mobile android, iOS and PCs platforms. AMPD reports and custom made research projects include the analysis of more than 100 digital platforms and cover use cases across Advertising, Content, Connectivity, Commerce, Gaming, Music & Video.

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