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PREMIUM ONLINE VIDEO CATEGORY REBOUNDS IN SOUTHEAST ASIA WITH NEW COMPETITION, LOCAL CONTENT AND SPORTS DRIVING EXPANSION

(SINGAPORE, Nov 22, 2022) Vidio’s live sports line-up, Amazon Prime Video’s Southeast Asia push and robust demand for Netflix, Disney+ Hotstar and Viu in key markets contributed to a rebound across premium video subscribers and viewership in Q3 2022, according to Media Partners Asia (MPA). The quarterly report, titled *Southeast Asia Online Video Consumer Insights & Analytics*, leverages MPA’s AMPD Research Platform to measure mobile streaming in five SEA markets.

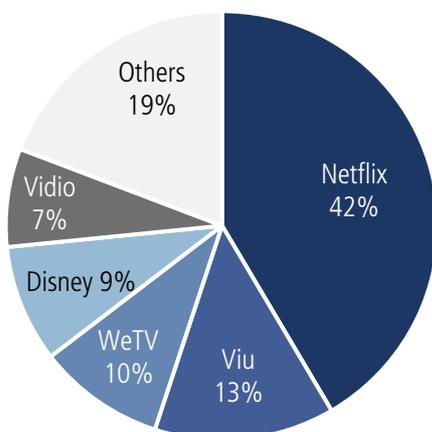
Premium online video viewership was up 6% Q/Q as Netflix, Disney+ Hotstar and Viu each grew demand, particularly in Indonesia and the Philippines. Netflix (42% of premium video viewership) and Disney+ Hotstar (9%) had a strong quarter, each gaining 3 points in share of aggregate premium video viewership in SEA, driven by Indonesia, Malaysia and Singapore. Netflix led premium video viewership in every SEA market.

SEA added 2.5 million net new subscribers in Q3 2022 to reach 43.5 million total subscriptions. Indonesia’s Vidio led regional subscriber growth, reflecting a strong quarter for local football league Liga 1 and the Premier League, despite disruptions to both in late-Q3, and ended Q3 2022 with 4 mil. subscribers. Amazon Prime Video’s localization efforts in Indonesia, Philippines and Thailand had robust early traction, with ~400,000 net adds, while Netflix had a strong, marketing-driven quarter in the Philippines as the market geared up for the long-awaited launch of Disney+. Across the five SEA markets in aggregate, Disney, Netflix and Viu remain the top 3 platforms in terms of paying customers with a combined 52% market share

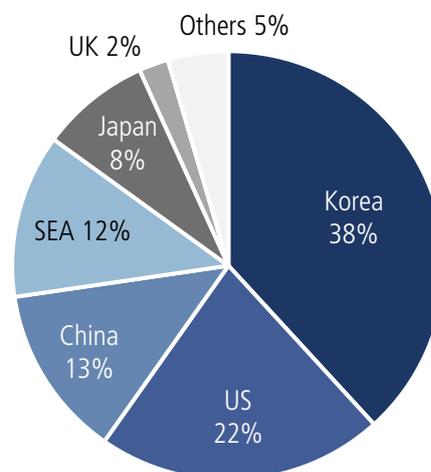
Commenting on the findings, MPA analyst Dhivya T said,

“The growth of Vidio and Prime Video have thus far expanded the SEA streaming universe. Breakout Korean hits such as Extraordinary Attorney Woo helped boost Netflix’s consumption leadership in SEA while Disney’s Big Mouth and Amazon’s Love In Contract also generated strong buzz. Korean dramas are the top streamed premium video category with 32% of total viewership. In Indonesia and Thailand, high quality local content remains critical. Originals such as Love Mechanics (WeTV), School Tales The Series (Netflix) and The Sexy Doctor is Mine (Vidio) were highlights in Q3. Disney+’s Philippines launch, Vidio’s momentum, and strong local slates from Netflix and Amazon are expected to drive SVOD growth in Q4, though consumer sentiment has weakened in Malaysia, Philippines and Thailand. Together with competitive intensity and a new focus on improved monetisation, this could lead to new dynamics and trends playing out in Q4 and over 2023.”

SEA PREMIUM VIDEO VIEWERSHIP BY PLATFORM (Q3 2022)



SEA PREMIUM VIDEO VIEWERSHIP BY CONTENT ORIGIN (Q3 2022)



Note: Aggregates key SVOD, AVOD & freemium platform consumption on mobile devices in five SEA markets.
Source: AMPD Research

Notes & Methodology

This report used two key tools to conduct research & frame analysis:

I. Consumer Survey. Data from the Consumer Survey informs key metrics reported in this study including: (1) Socio-economic & demographic indicators by VOD platform (2) Paying subscribers and monthly active users by VOD platform. MPA used the results of a Consumer Survey, which serves as a VOD Profiling Study conducted continuously across Indonesia, Malaysia, 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.

II. 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 and PC devices across 5 SEA markets. Title level consumption data from AMPD Vision informs key metrics reported in this study including streaming minutes & consumption share by platform, genre and country of origin. 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.

About AMPD Research (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 global streaming economy. AMPD has a footprint across 13 global markets. Critically, working with Reality Mine technology, AMPD 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 behavior 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 online video platforms and cover several use cases across Advertising, Content, Connectivity, Commerce, Gaming, Music & Video sectors.

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 behavior 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.

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