

September 20, 2022

## MPA REPORT: SVOD & BVOD PLATFORMS SHARE OF TOTAL STREAMING CONSUMPTION UP FROM 26% IN 2021 TO 35% IN 2022 YTD; NETFLIX RETAINS POLE POSITION

### Key Highlights

- Premium video streaming reached 24 bil. minutes in Jan-Aug 2022, capturing 35% of total online video streaming. YouTube remains powerful with 58% of online video consumption.
- SVOD platforms accounted for ~70% of premium video streaming; BVOD platforms took 30%.
- Australia topped 22 mil. SVOD subscriptions as of August 2022. Netflix leads with 30% market share while Disney+ and Amazon Prime Video compete for #2 at 17% each.
- Stan and Foxtel are local streaming leaders. Foxtel's Kayo is Australia's largest sports SVOD.

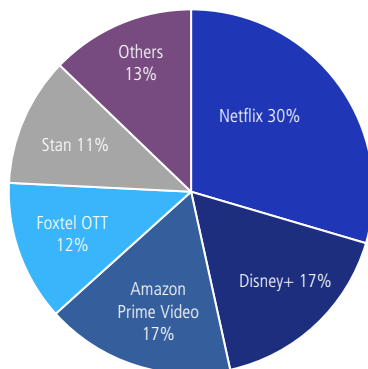
**(SINGAPORE, September 20, 2022)** Australians streamed 24 billion minutes of premium online video\* in Jan-Aug 2022, according to a report from Media Partners Asia (MPA) measuring the Australian streaming economy. SVOD platforms drove 70% of premium video streaming, while BVODs took 30%. The report, 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 22.1 mil. at end-August 2022, up from 19.4 mil. in Q3 2021. Netflix retains pole position with 30% share of subs, while expanding its lead in consumption share from 38% in 2021 to 50% in Jan-Aug 2022. Disney+ and Amazon Prime Video compete for second place with 17% share of subscribers each, while maintaining consumption share. Stan's share of streaming shrunk from 18% in 2021 to 8% in Jan-Aug 2022 as competition for first-window US dramas has intensified.

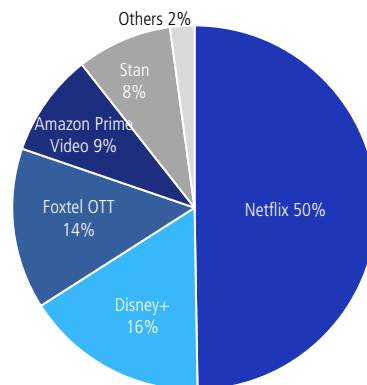
Commenting on the report's findings, MPA Executive Director Vivek Couto said:

“As the Australian SVOD market matures, platforms are increasingly focused on monetization. Netflix, Binge, Kayo and Stan have all raised prices over the past year and lower-cost, ad-supported tiers are expected from Netflix, Disney+ and potentially Amazon as platforms look to unlock new revenue streams. Competition for first-window English dramas is high as major studios Disney and Paramount have ceased or limited licensing, placing pressure on local GE platforms Stan and Binge to secure popular dramas, while Stan and Foxtel's Kayo continue to leverage key sports to drive ARPUs.”

**SHARE OF SVOD SUBSCRIBERS (AUG 2022)**



**SHARE OF SVOD STREAMING MINUTES (JAN-AUG 2022)**



**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, and other niche entertainment & sports apps.

## **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 16 unique OTT video platforms focusing on paying subscribers, monthly active users, streaming minutes, average daily time spent, viewer profiles and demographics. 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. 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 August 2022 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 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](http://www.media-partners-asia.com)

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