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MPA Report: US Content Resonant with APAC Audiences, Core to SVOD Appeal in the Region

(SINGAPORE, June 8, 2023) A new report published today by Media Partners Asia (MPA) entitled *US Content in the Asia Pacific*, leverages MPA subsidiary AMPD Research's nationally representative passive panel solutions of 40,000 online video users to measure actual premium video content viewership in APAC. The report aggregates passively measured viewership behaviour across 10 markets to unveil key trends in genres, formats, studios and hits, with insights on the impact of US content in the region.

The report highlights the vital role of US-originating content in APAC's subscription video on demand (SVOD) economy. Capturing 30% of SVOD viewership during the January 2022 - March 2023 period, US content is now established as the second largest SVOD viewership driver after South Korean productions. Australia, a US\$2.2 billion SVOD market, exhibits the highest reliance on US entertainment with 72% of measured SVOD viewership, followed by Singapore, Malaysia, and the Philippines where US content accounts for 40-50% of viewership on average with Indonesia close behind at 35%. In two of Asia's major SVOD markets – Japan and Korea, worth an aggregate US\$5.5B – US content has limited impact in generating streaming subscriptions. SVOD growth in these markets is anchored to domestic productions, particularly Korean dramas and variety and Japanese anime and live-action.

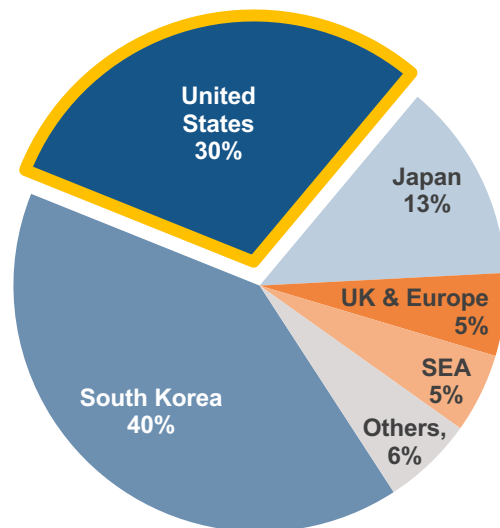
The report emphasizes the robust subscriber appeal of US content and growing fandoms in Australia, Singapore, Malaysia, Philippines, Indonesia, Thailand and Vietnam, despite competition from emergent local content demand (Indonesia and Thailand), and the popularity of K-dramas. MPA head of content insights Dhivya T added,

“US originals on Netflix are increasingly launched with Japanese, Indonesian, Thai, and Tagalog dubs, expanding their reach and accessibility in Asia. Strong fandoms have developed around many of Netflix's top originals, building on multi-season momentum like *Stranger Things* S4, *You* S4, and *Bridgerton* S2, while Disney taps into Marvel, Star Wars and family franchise fan bases. Sci-fi and fantasy emerged as the most popular US content genre in Asia over the past year, while comedy rules in Australia. It's notable that unscripted US content has had little impact in APAC ex-Australia, especially in Japan and Korea where audiences are well-served by distinct local variety & reality formats.”

The report also found that third-party studios drive significant US demand on across platforms, with the exception of Disney+ where most content supplied is owned by Disney's various GE, franchise and family properties. Licensed titles from Warner Bros. Discovery (*Friends*); NBCU

(Brooklyn Nine-Nine); Sony (Venom, Spider-Man); Paramount (SpongeBob, Big Bang Theory) contributed material viewership on Netflix. Warner Bros. Discovery titles, particularly HBO dramas (House of the Dragon, The Last of Us), capture significant viewership on Binge (Australia), while Paramount drives much of TVING's (Korea) limited US content demand.

APAC SVOD Viewership by Content Origin (Jan 2022 - Mar 2023)



Note: Analysis covers SVOD viewership measured through 1 Jan 2022 to 31 Mar 2023 in Australia, Indonesia, Japan, Korea, Malaysia, Philippines, Singapore, Taiwan, Thailand and Vietnam. Platforms covered include Astro Go, Binge, Disney+, Disney+ Hotstar, Hulu Japan, Netflix, Prime Video, Stan, TruelD, TVING, U-Next and Wavve.

Source: AMPD Research, Media Partners Asia

About AMPD Research

Launched in 2019 by MPA, AMPD provides businesses with valuable customer insights through real customer behaviour. Using our unique technology and sizable customer panel solutions, we collect data on how customers interact with brands and content across various touchpoints, from app & website visits to in-store purchases with detailed title level consumption. AMPD data drives insights that help businesses optimize strategies, including customer acquisition, content creation, monetization and marketing campaigns.

Across the 13 markets in which we operate, AMPD leverages more than 60,000 passively measured panel members. We have proven use cases across online video, advertising, connectivity as well content creation and acquisition. AMPD won the Best International Media Research Award at the 2023 UK Mediatel Media Research Awards, which recognizes organizations driving innovation in research.

About Media Partners Asia

Established in 2001, our mission is to serve companies focused on the creation, distribution and monetization of content, connectivity, data and related services across Asia Pacific. We provide definitive reports with proprietary industry models and forecasts. Our reports are widely used and sourced by local, regional and global companies for business planning, market strategy and capital market transactions.

MPA uses its deep strategic and operational knowledge of local markets to support corporate strategies driving growth. Our local market expertise provides clients with detailed country-level insights across media and telecoms, tracking key commercial and regulatory dynamics with relevant due diligence and strategy recommendations. We offer customized services to guide strategic planning and business development activities and support the launch of new products and services.

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