

Streaming TV's New Era

Embracing Ad-Supported Streaming
Across Screens in Southeast Asia

A Magnite Proprietary Research Study, 2023

Magnite

Spotlight: Southeast Asia





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Introduction

Ad-supported streaming in Southeast Asia has reached critical mass. For most households, streaming is a must-have source of entertainment. Engagement with streaming content is stronger than ever, especially when compared to social media. As more viewers tune in, their relationship with streaming services continues to mature and evolve.

Viewing habits among ad-supported streamers show that content is consumed across screen types, with smartphones most widely used. However, watching TV content on a smart TV is growing in popularity.

Streaming services are also a key channel for delivering brand impact. Ad-supported streamers said they discover new products and services from ads seen on streaming services.

Magnite plays a pivotal role at the intersection of advertising and the consumer experience. As such, we are uniquely positioned to provide market insights like those included in this report, **"Streaming TV's New Era,"** which highlights the consumer habits currently shaping streaming services and the benefit to brands.



GAVIN BUXTON
MANAGING DIRECTOR OF
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Methodology

Magnite's 2023 report, "**Streaming TV's New Era,**" puts audiences front and center, examining how consumer attitudes and behaviours are impacting the future of streaming TV.

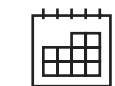
Magnite engaged Harris Interactive to execute a survey among 6,139 respondents across Southeast Asia. Markets include Singapore, Indonesia, the Philippines, Thailand, and Vietnam.



Online survey: The respondents are people ages 18–74 (age 20–74 in Thailand) who watch 7+ hours of TV a week, including streaming.



Own/use a connected device to access internet



Fieldwork: September 7–19, 2023

Glossary of Terms

Streaming Services

All television content (such as premium-produced movies, dramas, comedies, live programming, etc.) streamed via the internet regardless of the device it is watched on (CTV and OTT)

Streamers

Audiences that stream television content to any device type

Traditional TV

The combination of paid traditional TV (cable/satellite) and broadcast TV

TV viewers/total respondents

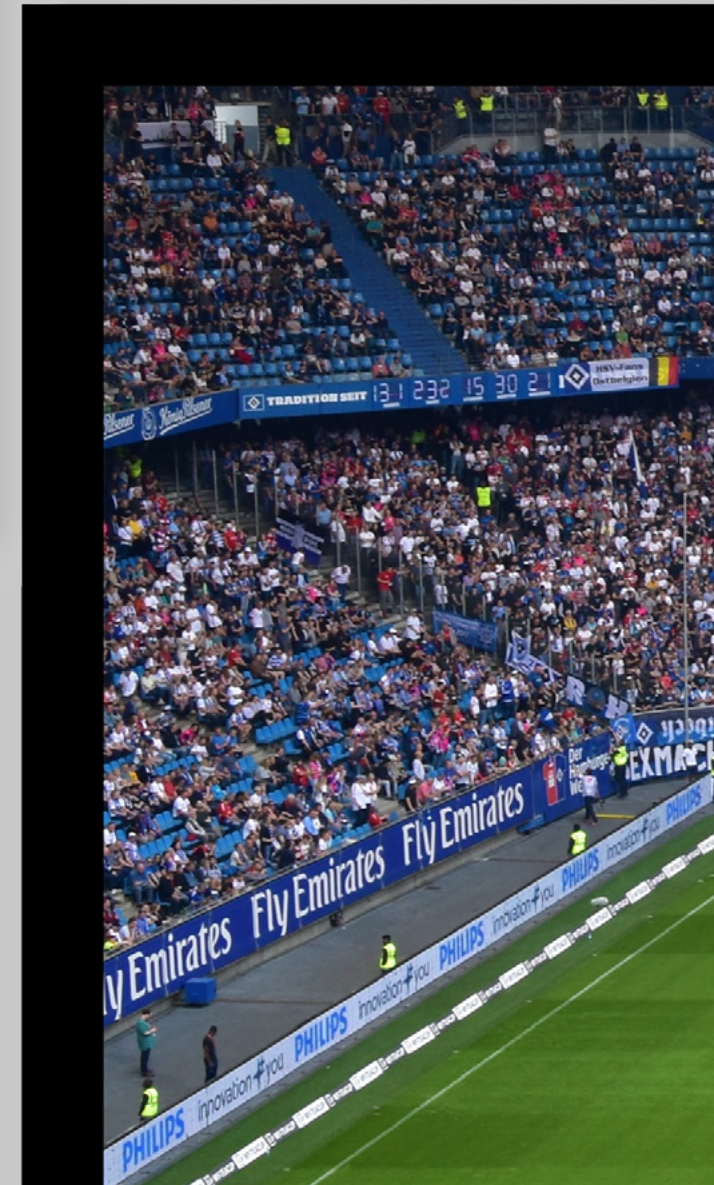
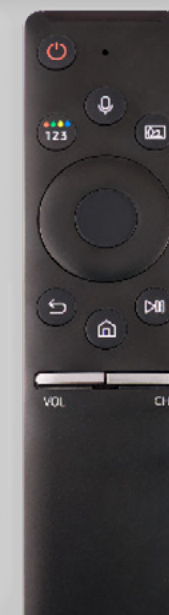
All respondents (respondents met criteria of watching 7+ hours of TV, including streaming, each week)

Social Media Users

Those who use one or more of the following platforms: YouTube, Facebook, Instagram, Snapchat, TikTok or X (formerly Twitter)

Southeast Asia Region

Singapore, Indonesia, Philippines, Thailand and Vietnam



Key Takeaways



1

Ad-supported streaming services deliver scale.

71% of TV viewers in Southeast Asia watch ad-supported streaming, on par with traditional TV viewers.

2

Ad-Supported viewers are watching TV content across devices.

Viewers are watching TV across device types with smart TV usage gaining momentum — 67% of ad-supported viewers watch content on a smart TV always/most of the time.

3

Streaming is winning viewers' attention over user-generated social video.

92% of ad-supported viewers say they are engaged when watching streaming, while 62% of social media users say the user-generated videos on social don't hold their attention.

4

Relevant ad experiences generate better outcomes.

9 in 10 ad-supported streamers are more likely to pay attention to ads that are relevant to their interests.

5

Streaming services move consumers down the purchase funnel.

48% of ad-supported viewers said they made a purchase from an ad they saw on streaming, as compared to 39% of social users who saw an ad within social video.

Note: Percentages shown in the report reflect Southeast Asia unless noted.

Ad-supported streaming services deliver scale in Southeast Asia.

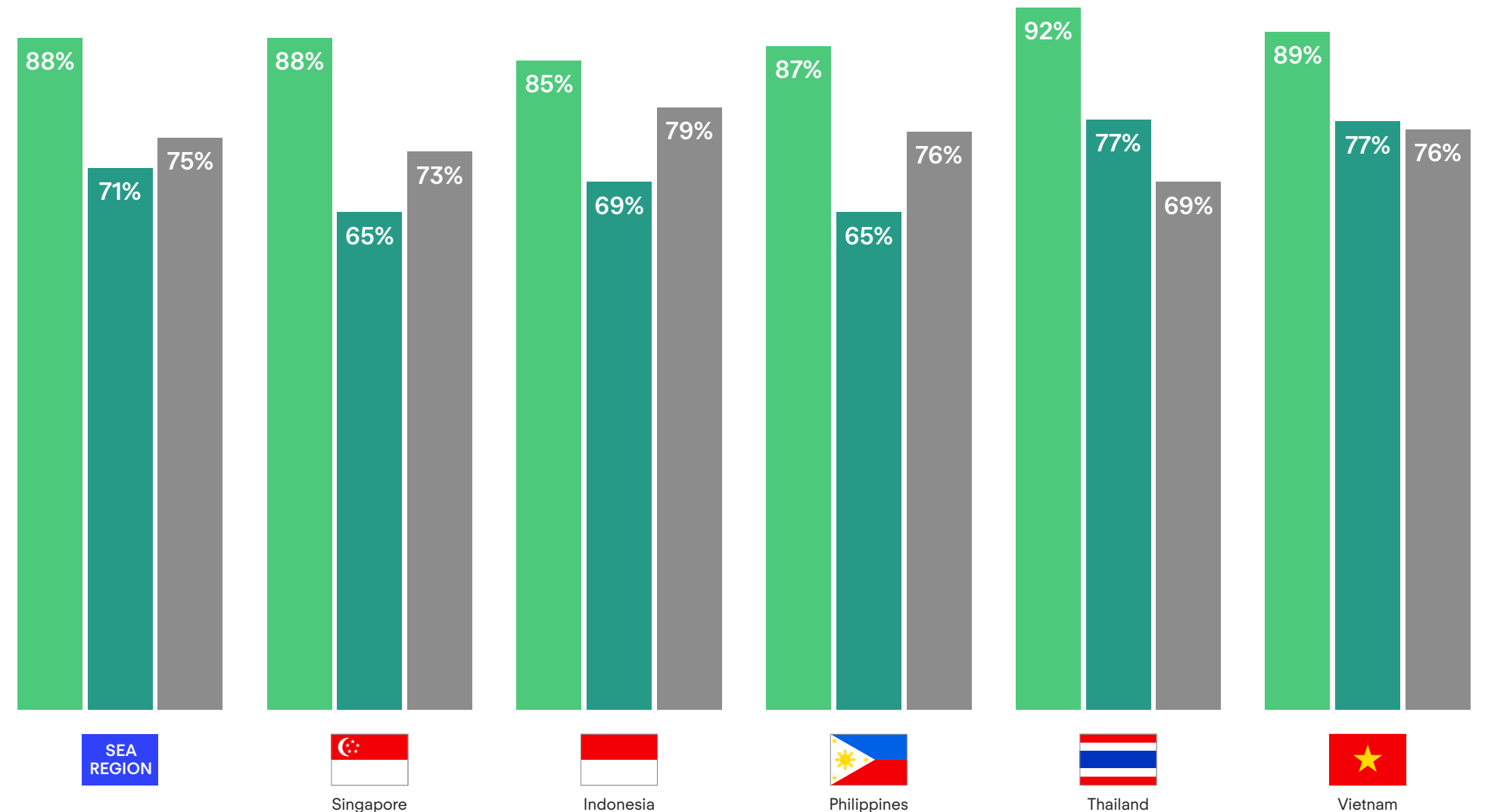
Streaming services with ads are watched by a majority of TV viewers in Southeast Asia. Findings from Magnite's research show that **ad-supported streaming services continue to increase in scale**, closing the gap with traditional TV viewers.

79% of TV viewers prefer to watch free or reduced-cost content with ads versus 21% who prefer an ad-free experience.

Ad-supported streaming services are catching up to traditional TV viewership

Among TV Viewers

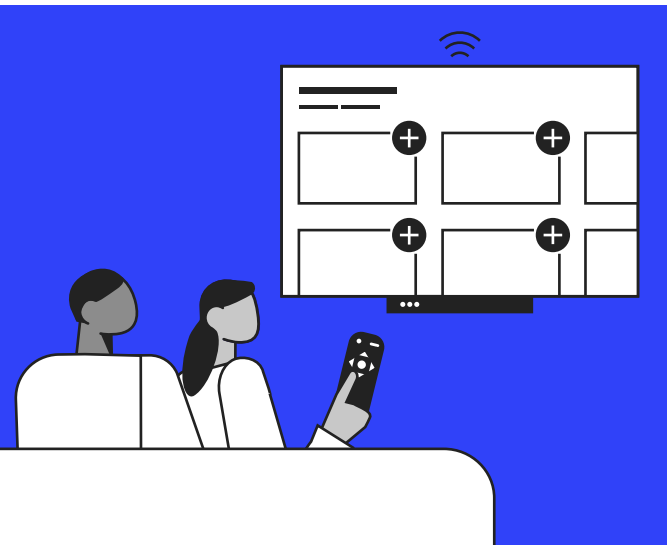
ANY STREAMING SERVICE
AD-SUPPORTED STREAMING
TRADITIONAL TV



Q: Which of these services do you use to watch TV shows and films?
Base: Total respondents
Source: Magnite

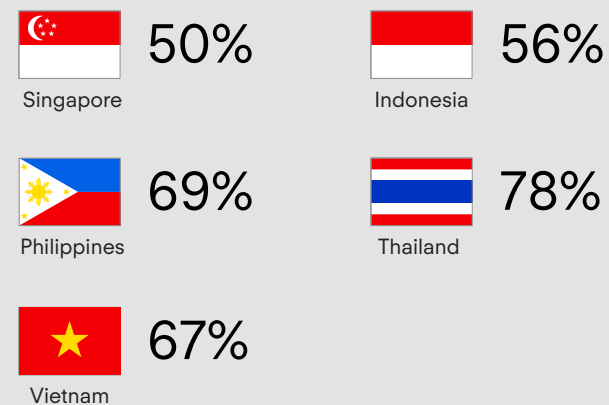
Viewers' appetite for streaming content continues to grow.

Ad-supported streamers show an increasing hunger for content. **Nearly 90% of this audience also considers streaming services a must-have in their household.**



Future viewing intentions indicate the value of streaming across markets

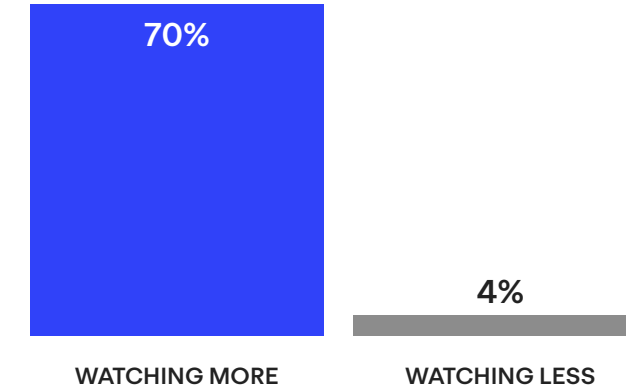
Plan to watch more streaming in the next year



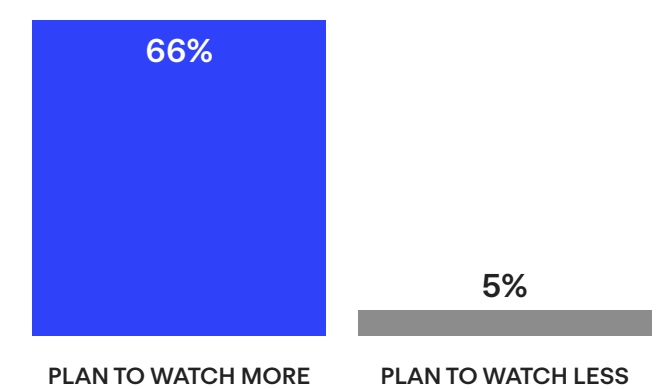
Q: Thinking ahead, do you think your consumption of streaming TV content will increase, stay the same or decrease in the next year?
Base: Ad-supported streamers in each market
Source: Magnite

Demand for streaming content among ad-supported viewers is not slowing down in Southeast Asia

Streaming content consumption vs. last year



Streaming content consumption intentions in the next year



Q: Compared to one year ago, are you watching more or less content on streaming services, or has the amount remained the same?
Q: Thinking ahead, do you think your consumption of streaming TV content will increase, stay the same or decrease in the next year?
Based: Ad-supported Streamers
Source: Magnite

Southeast Asian viewers' commitment to streaming content is underscored by their viewing habits

Among Ad-Supported Streamers

43% regularly watch multiple episodes of a TV show in one sitting

43% tune in to watch new episodes on streaming at set times



Q: When watching TV shows or movies, how often do you do the following? Regularly/almost always
Base: Ad-supported streamers
Source: Magnite

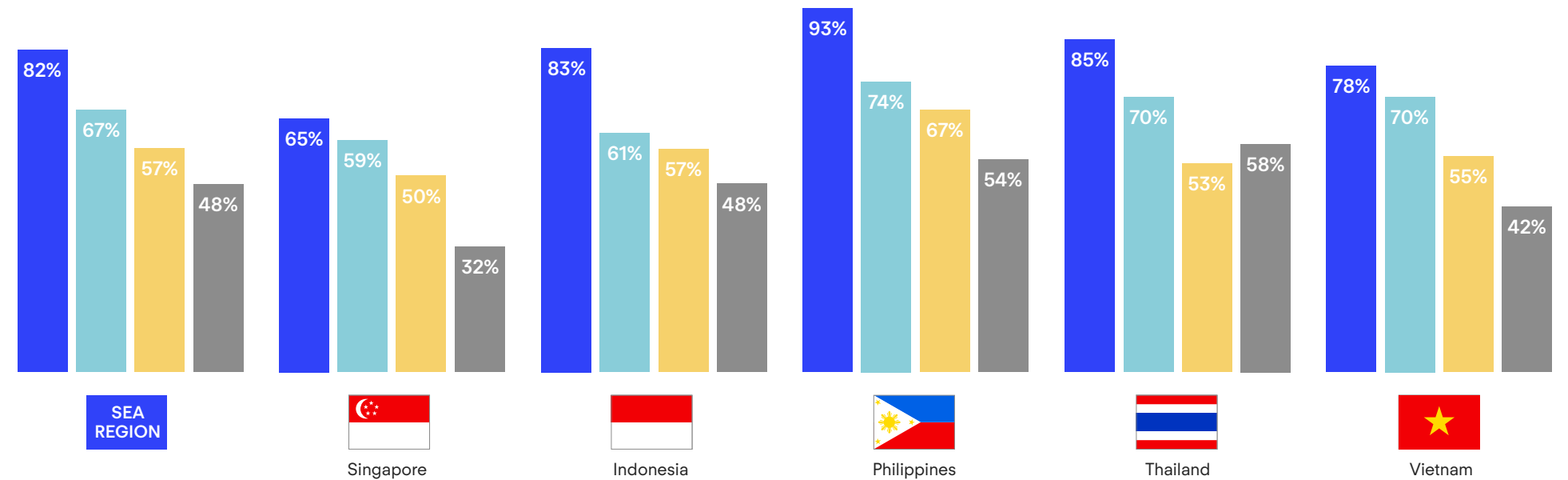
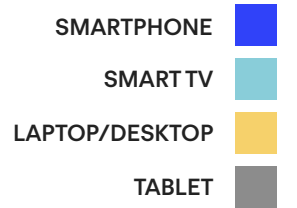
Engage with ad-supported streamers across screens.

On average, ad-supported streamers in Southeast Asia spend just over two hours a day watching streaming content.

Their consumption habits are not confined to one screen; rather, they watch across device types, with increasing use of smart TVs. Our study shows that **67% of ad-supported streamers are watching content always/most of the time on a smart TV.**

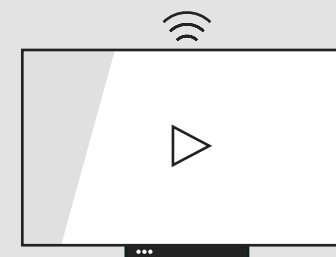
Ad-supported streamers are watching content across screens

Devices used always/most of the time to watch TV content



Q: In a typical week, how frequently do you use each of these to watch TV shows and films? Always/most of the time
 Base: Ad-supported streamers
 Source: Magnite

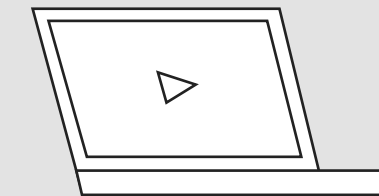
Viewing experience ratings are similar across screens in the Southeast Asia region



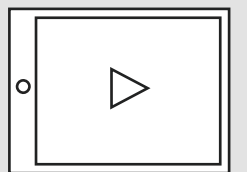
SMART TV
87%



SMARTPHONE
83%



LAPTOP/DESKTOP
81%



TABLET
78%

Q: How would you rate your TV viewing experience on each of the following devices? Excellent/good
 Base: Those who watch TV content on each device among ad-supported streamers
 Source: Magnite

Co-viewing on a smart TV is common across Southeast Asia.

Big screens promote shared viewing experiences. As viewers increasingly stream content on smart TVs, there's a greater likelihood they'll watch TV shows and movies alongside family and friends. This offers brands a chance to engage with a wider audience and reach entire households.

A majority of viewers across markets are watching with others

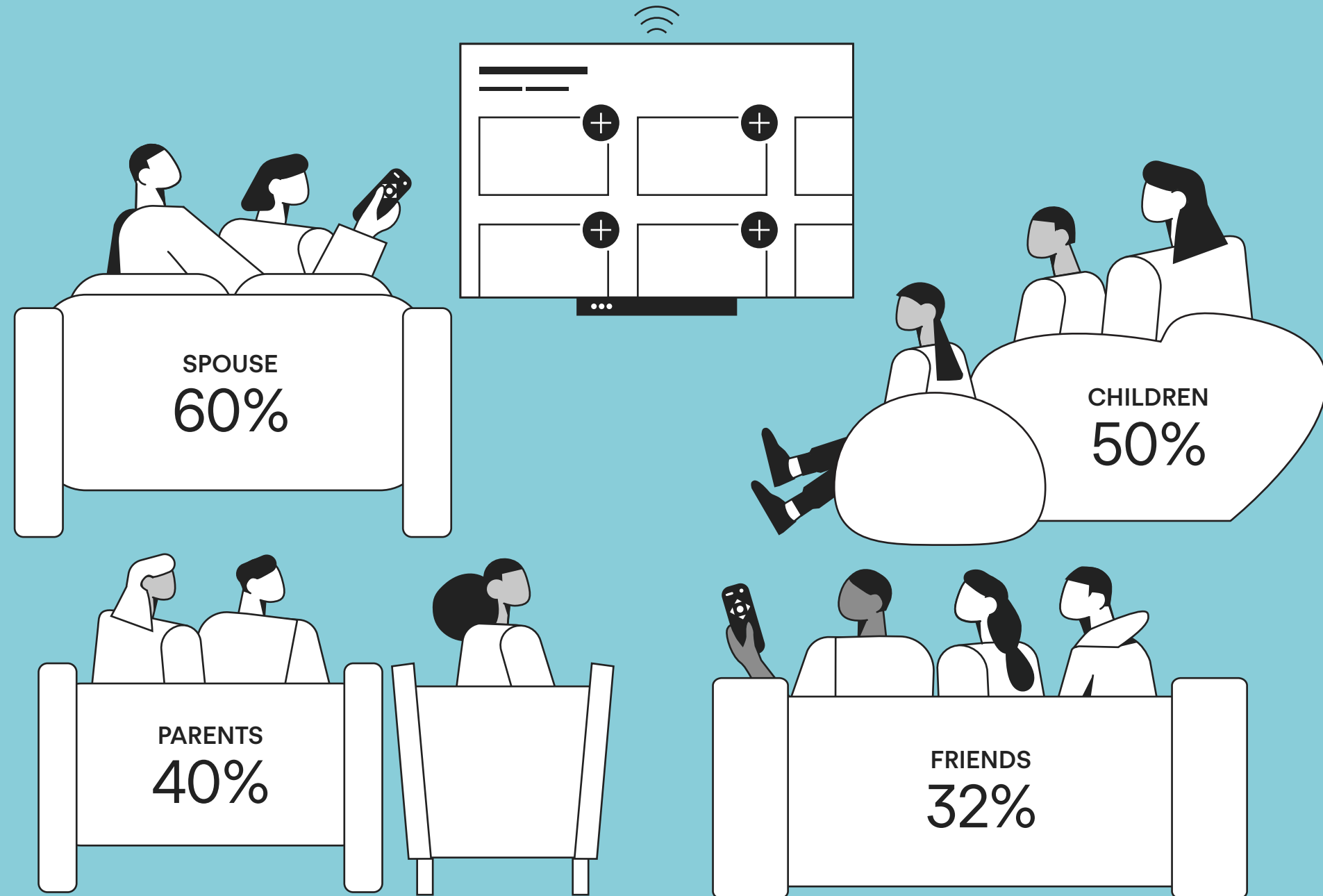
Watch streaming content on a smart TV with two or more people



Q: How many people do you typically watch shows and/or movies on streaming services with when watching on a smart TV in an average week?

Base: Ad-supported Streamers
Source: Magnite

Co-viewing on a smart TV is mostly with family



Q: You indicated you watch streaming content on a smart TV with one or more people. Who do you typically watch with?
Base: Ad-supported streamers
Source: Magnite

Ad-supported streamers watch content across multiple services.

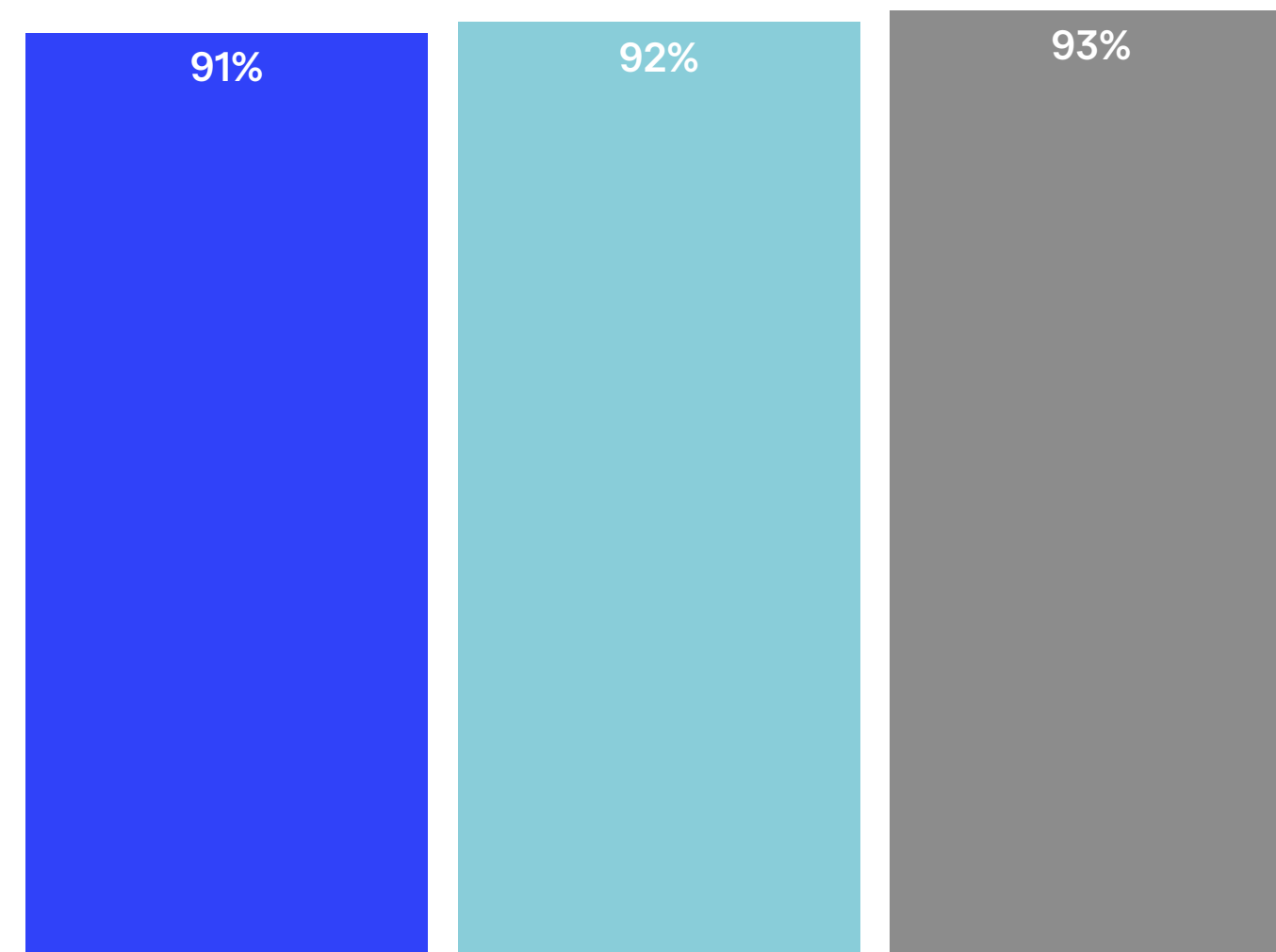
Viewers stream a wide selection of programming on ad-supported services. Their viewing habits underscore the need for brands to have a strong presence across numerous services to achieve scale.



85% of viewers of free streaming services watch content on the free services Magnite works with.²

2) Based on the free streaming services included within the research.

Viewing habits among ad-supported streamers show their overall attachment to ad-based services



SWITCH FROM SERVICE TO SERVICE DEPENDING ON WHAT I'M IN THE MOOD TO WATCH

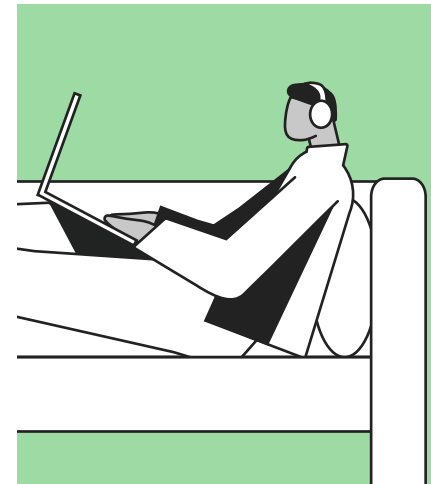
USE MULTIPLE STREAMING SERVICES TO WATCH A VARIETY OF PROGRAMMING

IF A NEW FREE STREAMING SERVICE LAUNCHES, I'D BE LIKELY TO WATCH IT

Q: To what extent do you agree or disagree with the following statements related to streaming services with advertising that you watch. T2B
Base: Ad-supported streamers
Source: Magnite

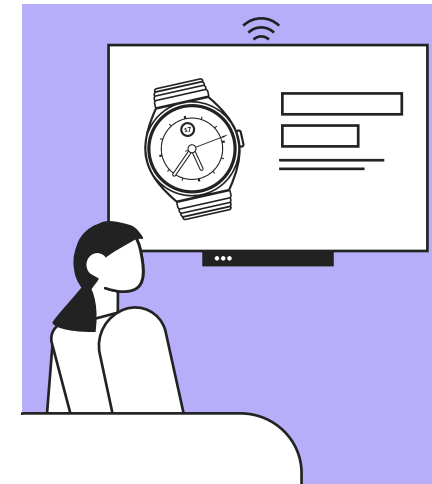


Streaming services are a high-impact channel for brands.



1

Streaming delivers an engaged audience.



2

Streaming content captures and holds viewer attention.



3

Streaming services build relationships with brands.

Streaming cultivates deeper engagement than social media.

Not all video advertising environments foster the same level of engagement. Streaming services captivate viewers for longer periods, whereas the nature of social media lends itself to quick scrolling.

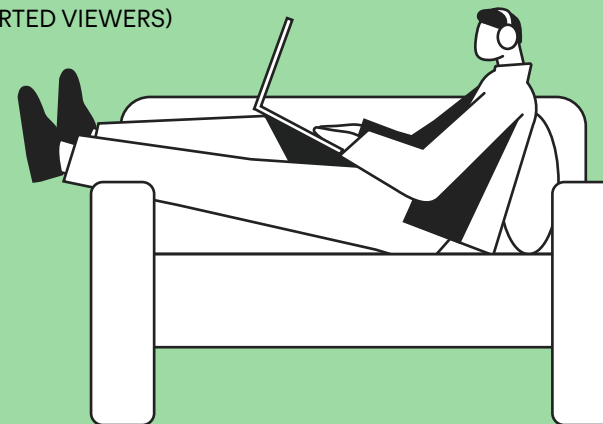
Q: To what extent do you agree or disagree with the following statements regarding the content on streaming services you watch/see on social media and the way you watch/use them? T2B
Source: Magnite

Streamers in Southeast Asia are intentional viewers, and watch content for long periods

STREAMING SERVICES
(AMONG AD-SUPPORTED VIEWERS)

View streaming TV content for a long period of time (more than 30 minutes) each time I watch

96%

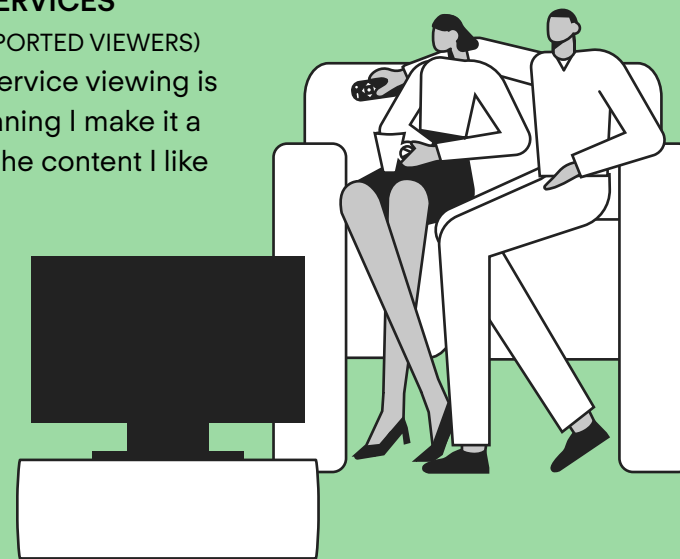


VS.

STREAMING SERVICES
(AMONG AD-SUPPORTED VIEWERS)

My streaming service viewing is intentional, meaning I make it a point to watch the content I like

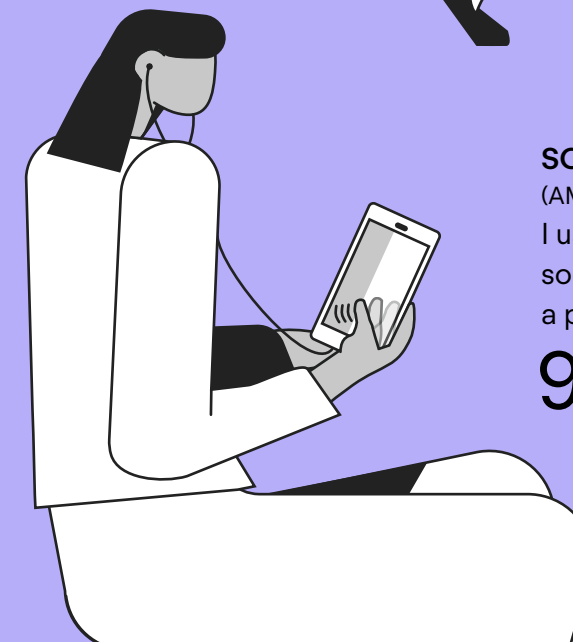
96%



Social media users in Southeast Asia scroll quickly during short sessions

SOCIAL MEDIA
(AMONG SOCIAL MEDIA USERS)
Launch social media app(s) multiple times throughout the day, and each session is usually brief (under a few minutes)

88%



SOCIAL MEDIA
(AMONG SOCIAL MEDIA USERS)

I usually scroll through my social feed quickly until I see a post that interests me

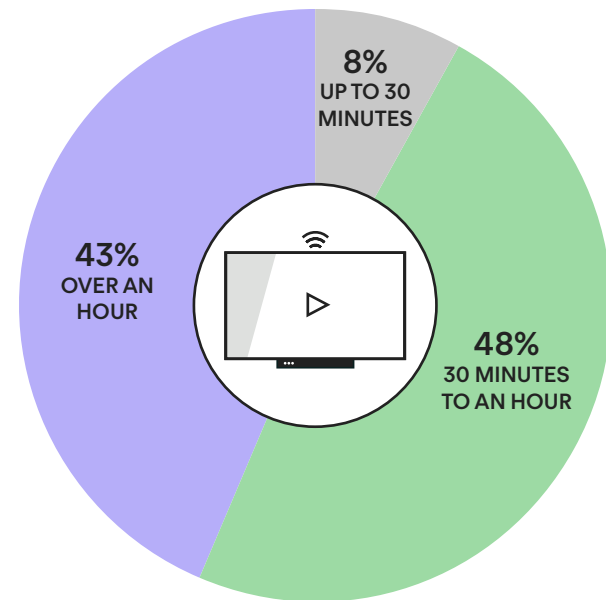
92%

Streaming's immersive environment keeps viewers engaged.

Streaming services offer premium, long-form content that engages viewers for extensive periods of time.

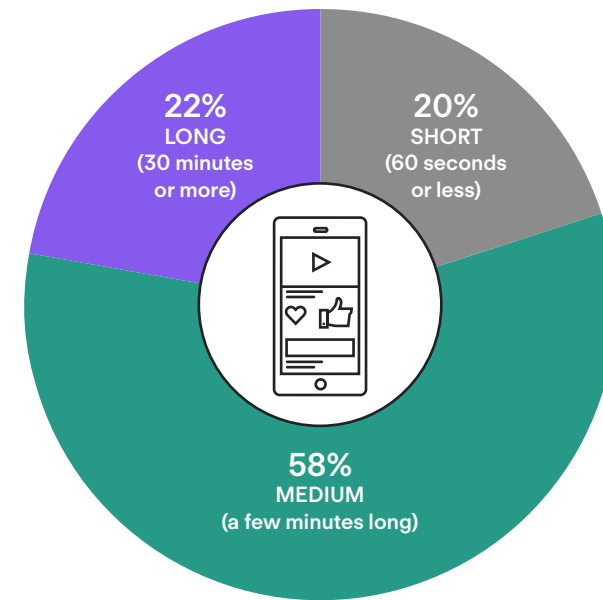
Most ad-supported viewers watch programming that is over thirty minutes long. In contrast, social video viewers mostly watch clips that span a few minutes or less.

Videos a half hour or longer are the most popular on streaming



Q: How long are the videos/programming you mostly watch on streaming services?
Base: Ad-supported streamers
Source: Magnite

Videos a few minutes long are the most popular on social platforms



Q: How long are the videos you mostly watch on social media?
Base: Social media video viewers
Source: Magnite

Streaming content is winning the attention of viewers in Southeast Asia

92%

When watching streaming, I find I'm an engaged viewer

(AMONG AD-SUPPORTED VIEWERS)

62%

The user-generated videos on social media do not hold my attention for very long

(AMONG SOCIAL MEDIA USERS)

Q: To what extent do you agree or disagree with the following statements regarding the content on streaming services you watch/see on social media and the way you watch/use them? T2B

Source: Magnite

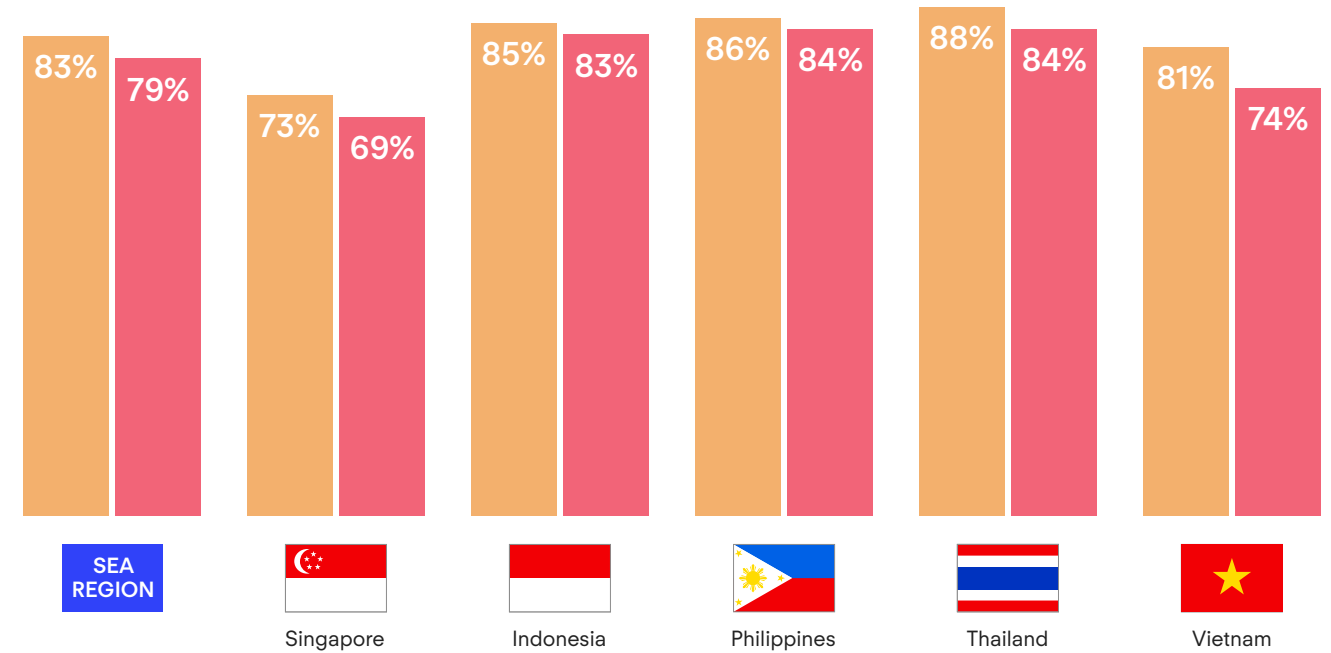


Personalization enhances the ad experience for viewers.

Viewers in Southeast Asia see the value exchange in streaming ads. Overall, they are willing to provide information about themselves if it means they will see relevant ads. **A majority of ad-supported streamers, 91%, also trust the ads they see on streaming.** This likely results in a high level of satisfaction with the ad experience in streaming environments.

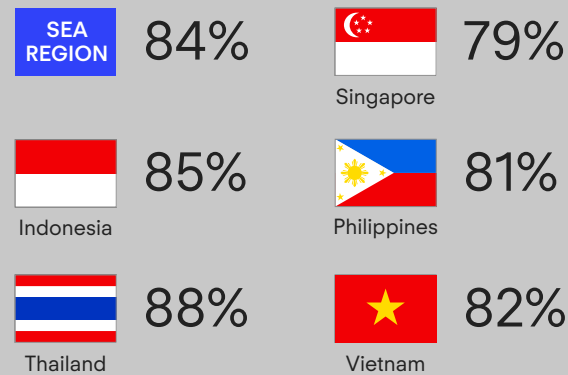
Viewers across markets are willing to share information in order to see relevant ads

- Comfortable providing information about my interests if it results in a more targeted advertising experience
- Comfortable providing demographics about myself if it results in a more targeted advertising experience



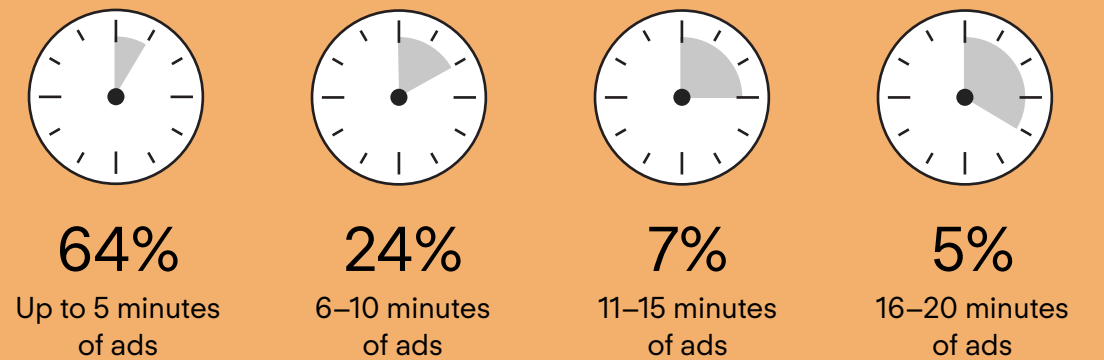
Q: To what extent do you agree or disagree with the following statements related to ads within streaming services. T2B
 Base: Ad-supported streamers
 Source: Magnite

Across markets, ad-supported viewers are satisfied with the ad experience in streaming



Q: To what extent do you agree or disagree with the following statements related to ads within streaming services. T2B
 Base: Ad-supported streamers
 Source: Magnite

Acceptable duration of ads per hour among ad-supported streamers



Q: How many minutes of ads per hour would you consider to be acceptable on streaming services?
 Base: Ad-supported streamers
 Source: Magnite

Ads in streaming TV environments drive brand visibility.

Streaming's ability to deliver relevant ads to viewers increases brand visibility and positively influences purchase decisions.



Magnite's omnichannel audience product suite, Magnite Access, makes it easier for media owners and their advertisers to maximize data assets by making audience data more accessible, actionable and addressable.

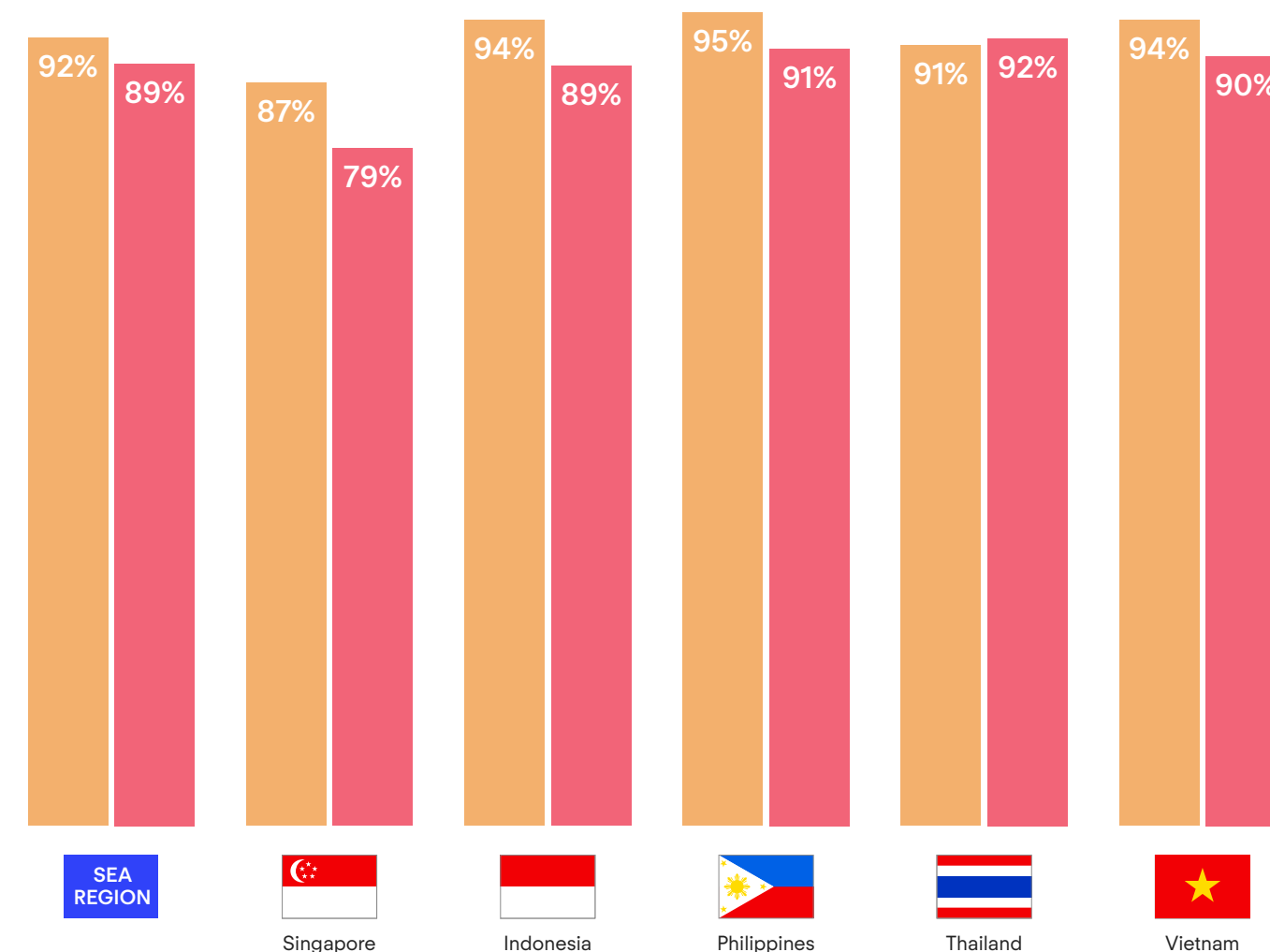
Streaming services are a source for discovering brands



Q: To what extent do you agree or disagree with the following statements related to ads within streaming services. "I have discovered new products/services as a result of seeing ads within streaming services." T2B
 Base: Ad-supported streamers
 Source: Magnite

Targeted ads get noticed and viewers take action

 I'm more likely to pay attention to ads that are relevant to my interests
 I am more likely to consider purchasing a product and/or service if the ads are targeted to me



Q: To what extent do you agree or disagree with the following statements related to ads within streaming services. T2B
 Base: Ad-supported streamers
 Source: Magnite

Ads on streaming services are effective at driving purchase intent.

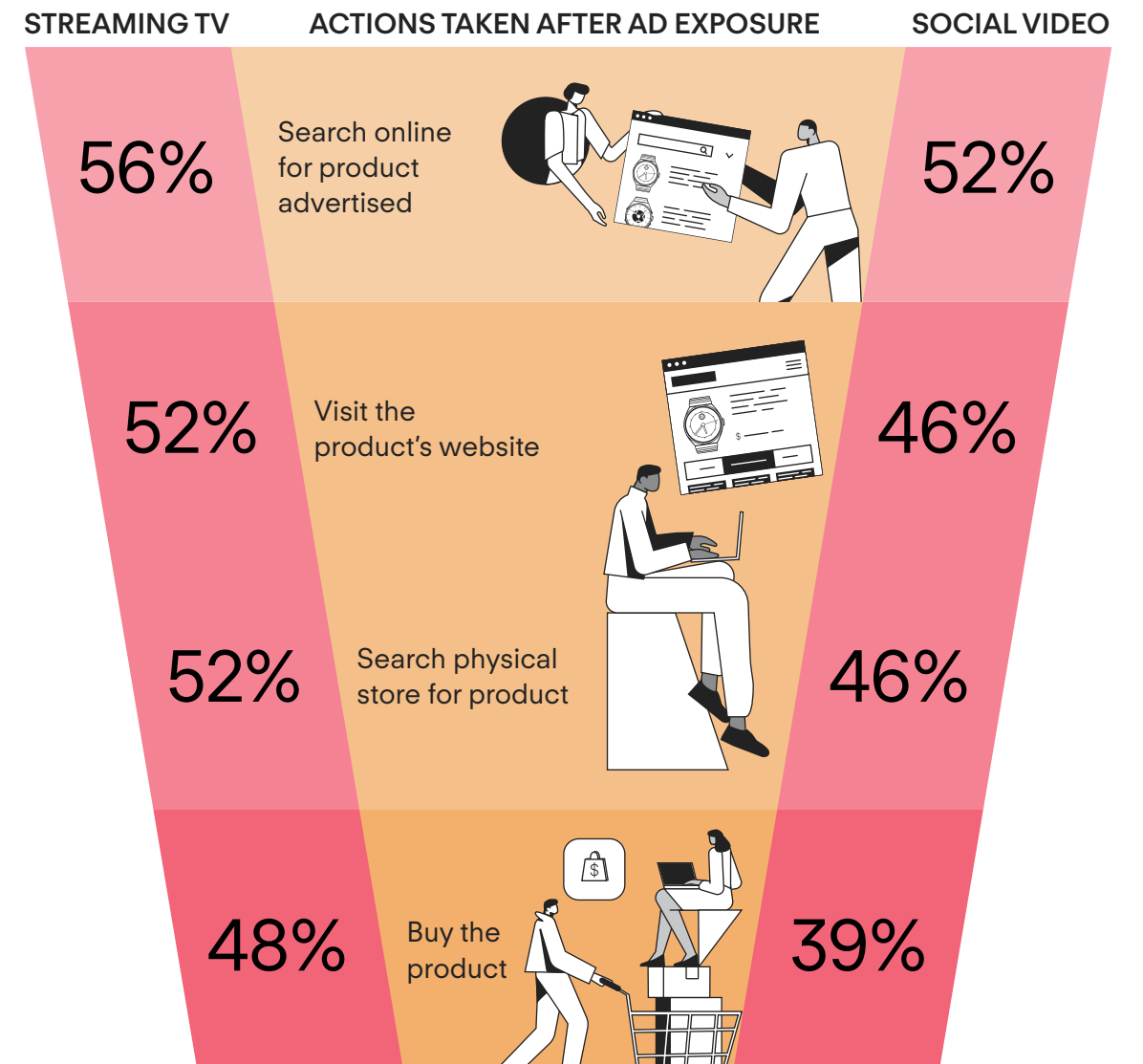
Streaming's premium environment lifts brand impact, more so than social video. **Among ad-supported viewers, 68% take action after seeing an ad on streaming platforms.** Streaming outperforms social media across all points along the purchase decision journey.

Exposure to brand messaging across screens strengthens the relationship between consumers and brands.

94% of ad-supported streamers in Southeast Asia are more likely to make a purchase from a brand they engaged with across multiple devices (TV, mobile, desktop, etc.).



Streaming positively influences the purchase decision journey



Q: When you see ads while watching streaming services/social media videos, how often do you do the following?
 Always/almost always/frequently
 Bases: Streaming TV among ad-supported streamers and social video among social media users
 Source: Magnite

SUMMARY

The benefit of ad-supported streaming.

Ad-supported streaming has achieved scale in Southeast Asia, attracting a highly engaged audience that watches for extended periods of time. Cross-device streaming TV viewing habits foster robust connections with brands, presenting the opportunity to amplify advertising impact across multiple screens.

Streaming is not only a channel where ad-supported viewers discover new brands, it's also influential in leading them to make a purchase.



Ready to make ad-supported streaming the start of your next plan?

Ask your Magnite account representative for more information or email asia-df@magnite.com