

# OTT Media Services Consumer Survey & OTT-CSP Partnership Study

India, Australia, Singapore, Thailand, Philippines



A market study by Ovum



# What's inside

Overall insight from 5 countries

**Country view:**

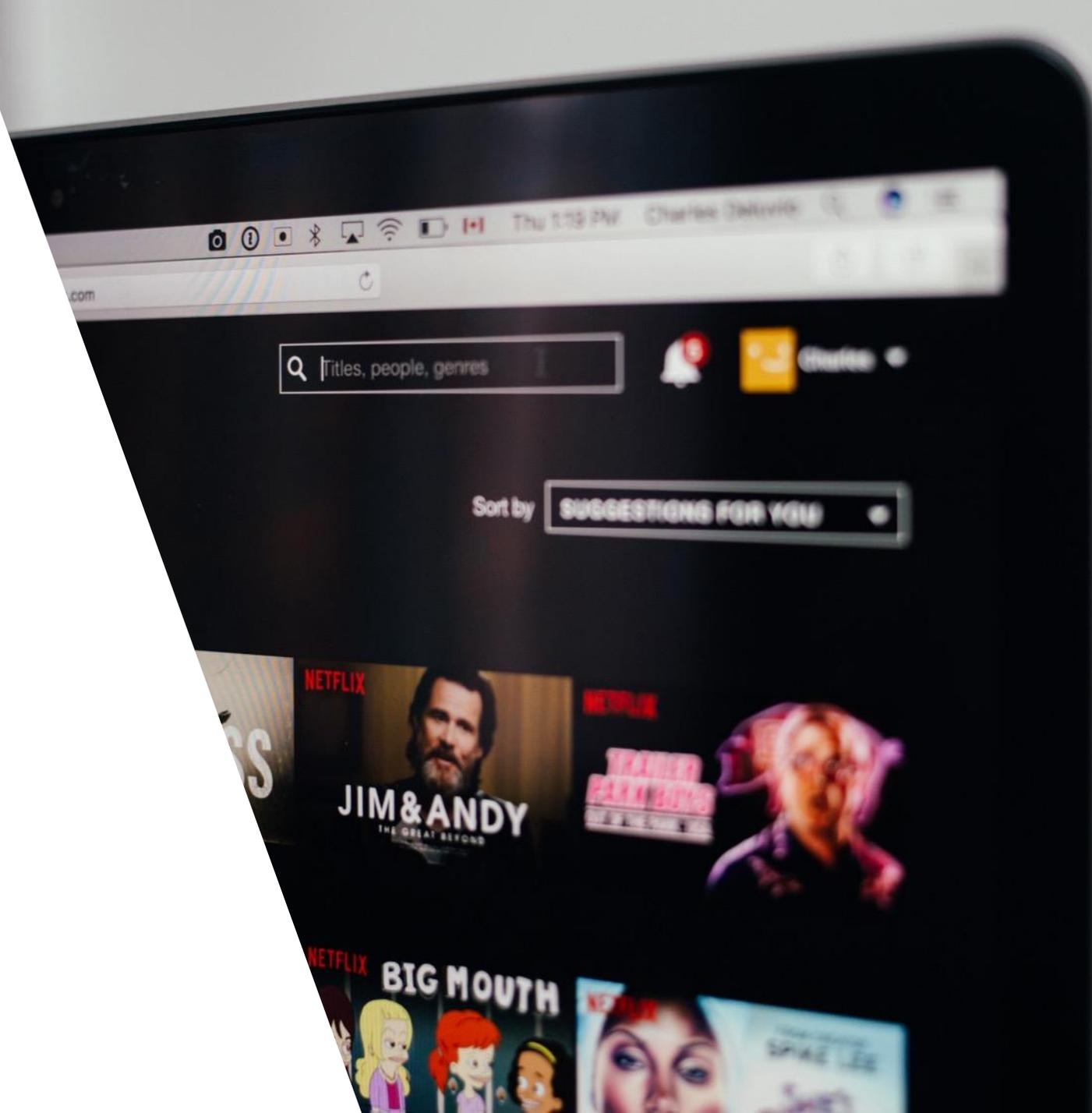
India

Philippines

Singapore

Australia

Thailand



# The study

Countries: India, Australia, Singapore, Philippines, Thailand



**4000** consumers across 5 countries



**13** communications service providers



**12** over the top (OTT) players

Survey conducted by Ovum end of 2019

# bundled services

—  
what consumers want



# Consumers remain loyal and pay more for carrier-bundled media services

Around **45%** of respondents said the bundled media made them either spend more on their carrier plan or remain loyal to their carrier – or both

**27%** said that they might switch network in search of one of their desired paid media services if offered at a price discount or with an extended free-trial period.

Convenience triumphs discounts and free offers: **Three-fifths** sign up because of the ease of either paying via their telco bill or paying for different services under a single bill, or for better customer support

**Less than 20%** put down price subsidization as their main reason for bundling



# Bundled media service makes consumers spend more on mobile or broadband subscriptions

**42%** respondents said having the media bundle made them spend more on their carrier plan

**43%** said they were more likely to stick with their current telecoms provider

Only **5%** of survey respondents said that the bundle had no effect on either their loyalty or spending



Answers given by respondents with experience of bundling paid media services with their telco plans

The bundled media service was the main reason why I was willing to spend more on my mobile/fixed-line telecoms subscription.

42%

Having access to my bundled media service made me less likely to switch to another service provider.

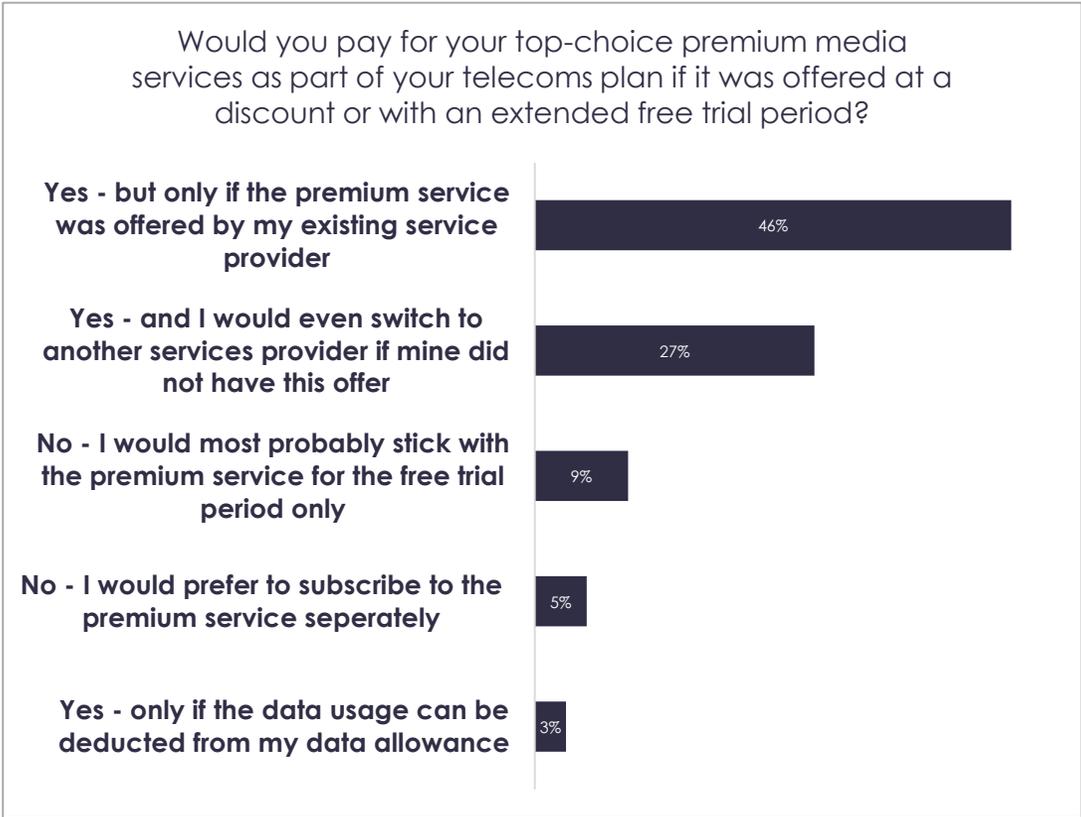
43%

The results did not vary that markedly between countries

Direct link between ARPU and user-retention effects of carrier-bundled paid media services

# Consumers are willing to pay for premium media services, and will switch service providers for better media experience

**46%** respondents are willing to pay for premium media services, if offered discount or extended free trials.

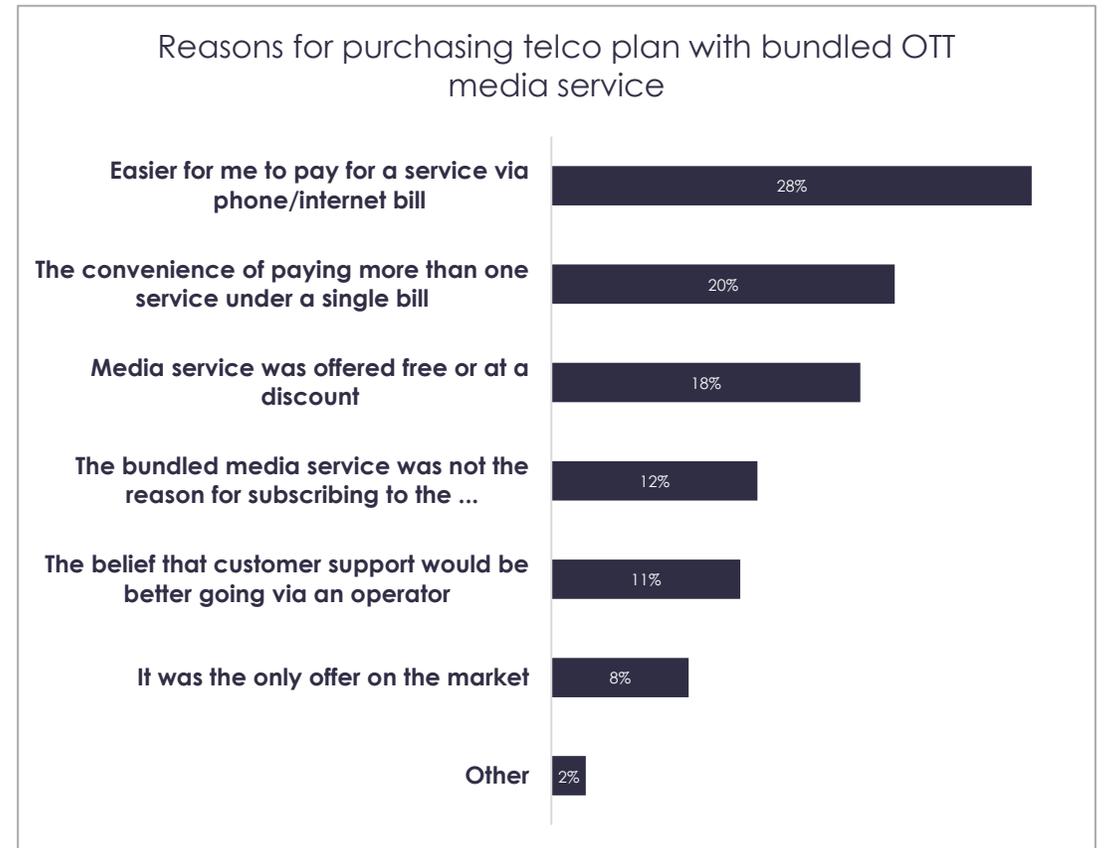


# Convenience, not discounts, drives preference for carrier-bundled media services

About **60%** say they sign up because of the ease of either paying via their telco bill or paying for different services under a single bill, or for better customer service

Only under **20%** put down price subsidization as their main reason for bundling

Surprisingly for a survey in which the majority of respondents are from price-sensitive markets (i.e. India, Philippines, Thailand), price discounts or free offers scored relatively low as a driver for purchasing bundles. But that is also reflected in surveys conducted by Ovum in other emerging markets.



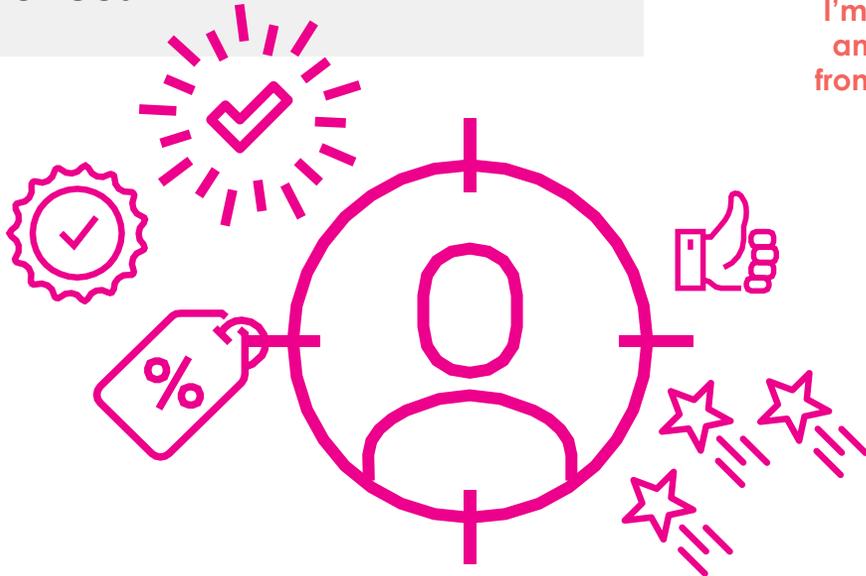
# Right media package and experience can create opportunities to attract more consumers

Out of 47% of respondents currently with no carrier bundled services:

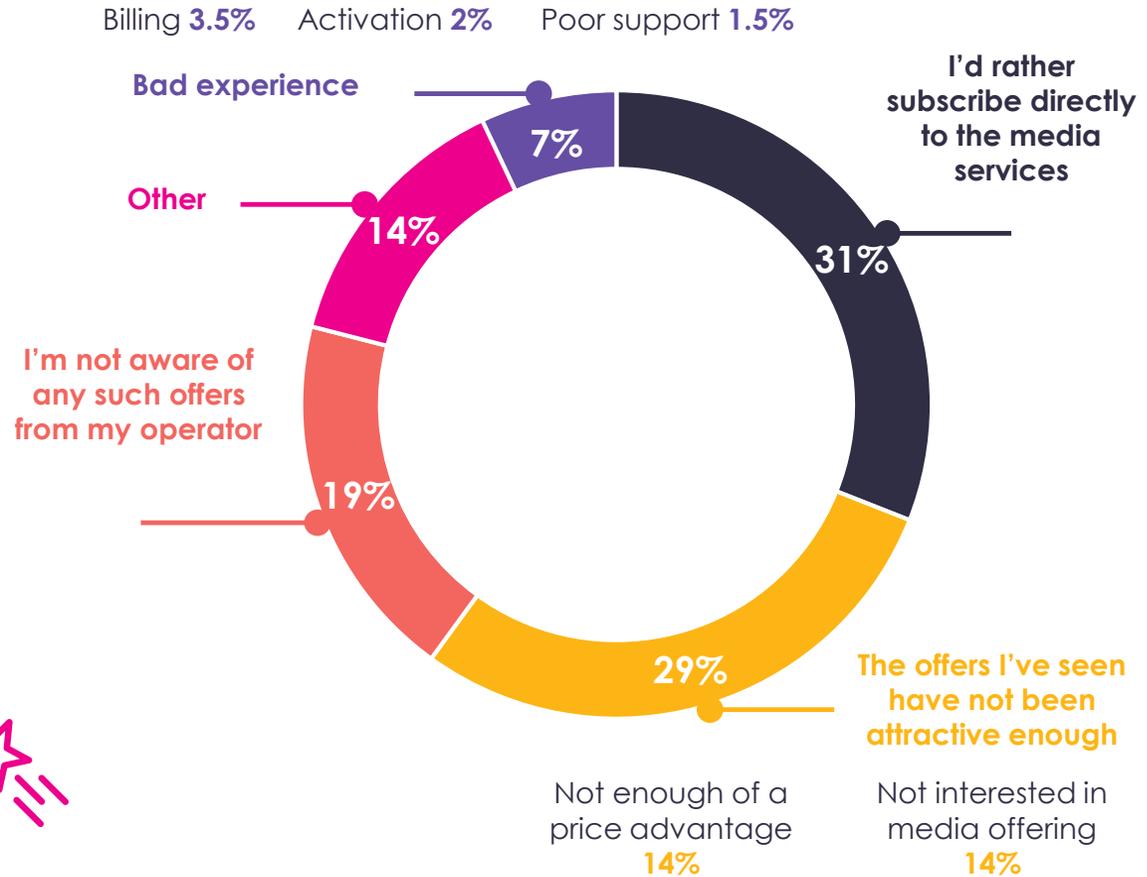
**29%** don't find any attractive offers

About **20%** not aware of any such bundle offers.

**7%** blamed previous bad experiences



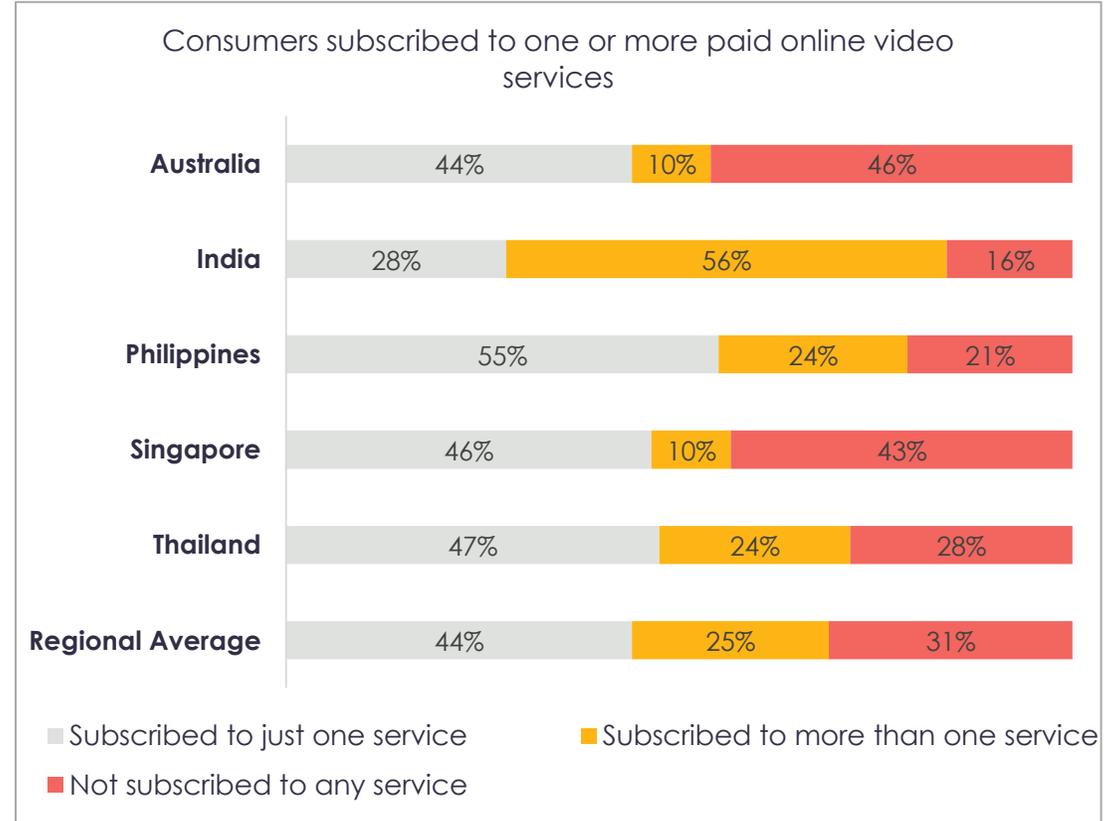
Reasons for not purchasing telco-bundled media service



# Developing country consumers are more likely to subscribe to more than one service

Consumers in developing countries showed more propensity to subscribe to more than one service, than those in developed countries

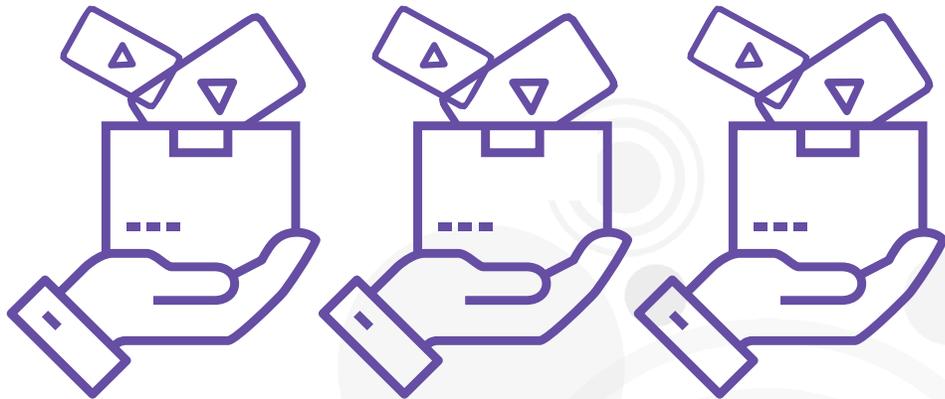
**56%** of Indian respondents have subscribed to more than one paid online video services.



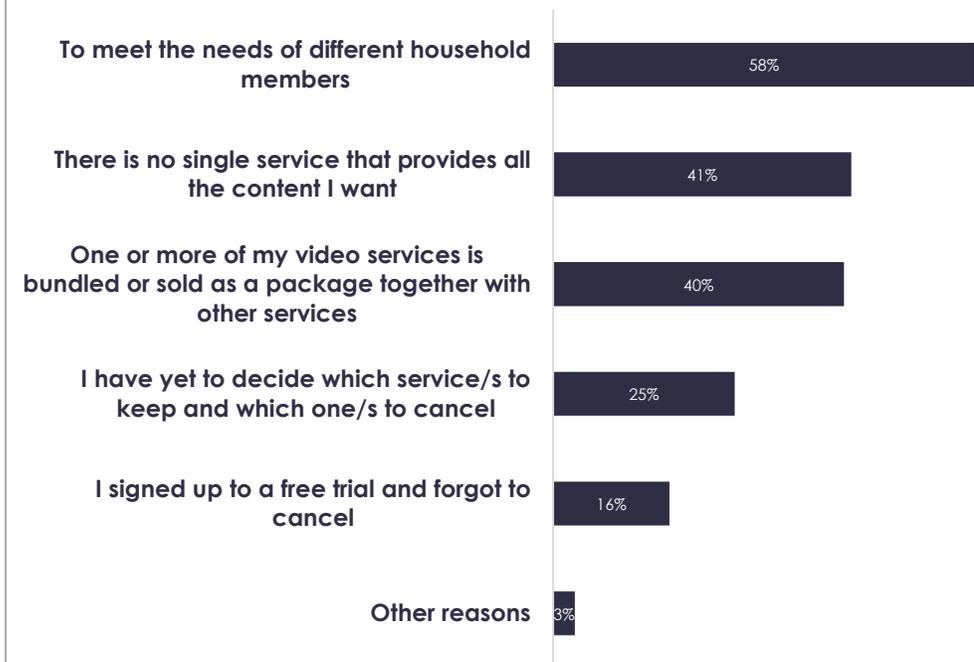
# Opportunity to increase number of subscribers and share of multi-subscriptions

**58%** of those who subscribe to more than one paid media service want more than one OTT service to meet the needs of different family members

**41%** says there is no single service that provides all the content they want



Reasons for having more than one paid online video subscription



# pricing & services

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# OTT media is still expensive for most consumers

**More than 50%** of respondents found the average standard subscription price too expensive, with Thailand being the exception (45%)

The biggest percentage of respondents unwilling to pay the average price for a standard subscription was in Singapore

The second highest level of unaffordability among survey respondents was in India, followed by Australia and the Philippines

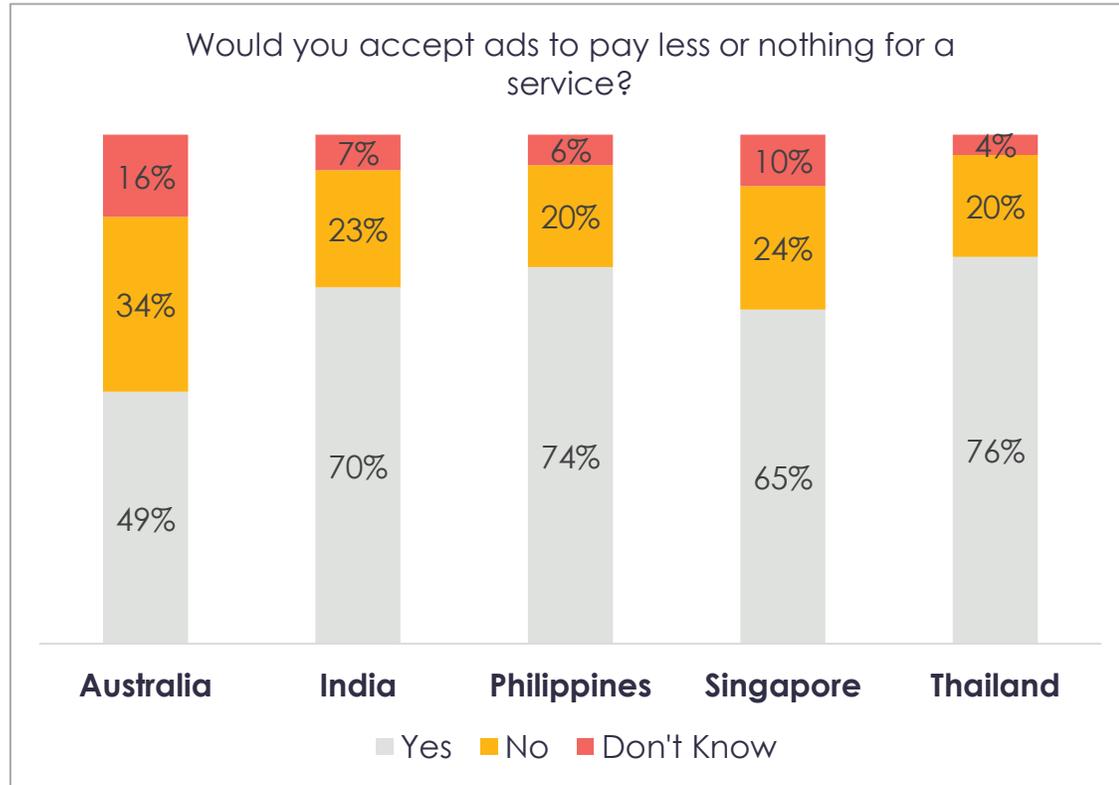
Average subscription price and consumers willing to pay it

Country	Average standard monthly subscription price	% of consumers not willing to pay that much
Australia	A\$11.84	54%
India	INR 306	59%
Philippines	PHP 242	51%
Singapore	S\$12.47	63%
Thailand	THB 227	45%

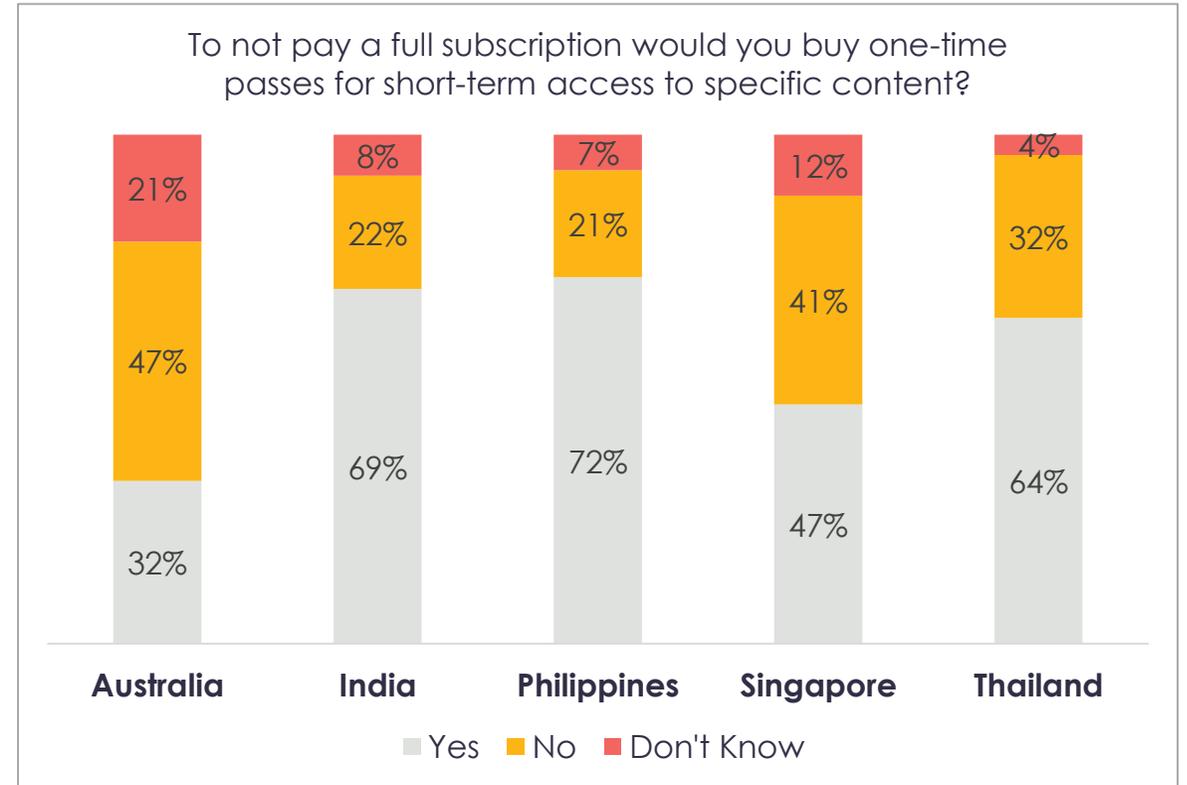
Ironically, where consumers are the least willing to pay available subscription prices – i.e. Singapore – is also where they are among the most reluctant to accept alternative service-funding models. Singaporean respondents are second only to Australian respondents in rejecting advertising or purchasing one-time passes (see next slide).



# Consumers are okay with ads and one-time passes for short-term access if it reduces their bill



Source: Ovum



Source data: Amdocs' commissioned consumer survey. 3,940 total respondents across Australia, India, Philippines, Singapore, Thailand

# Consumers have no issue sharing their data in return for discounted or free access to media services

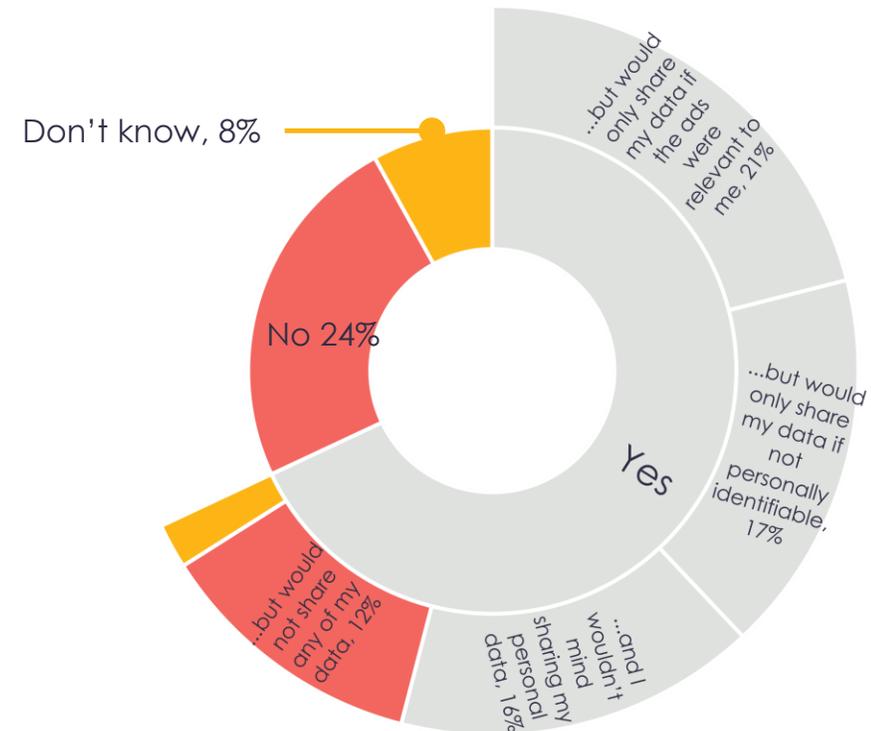
**54%** respondents are willing to either share their data without any condition (16%), or conditionally (38%) for content filled with ads

Emerging-market respondents are least concerned about sharing their data with advertisers

In all markets there is a disconnect amongst a small fraction of respondents who are happy to receive ads but are unwilling to share any data.

An average of 12% of respondents across the five markets fall within this category.

Would you accept ads to pay less or nothing for a service? (regional average)



# telco-OTT partnerships

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a win-win for telcos, OTTs, and  
consumers



**For OTTs, bundling is quickest way to expand reach; for carriers – it helps improve ARPU, retain users**

## **OTTs' top reasons for partnering**

Distribution

Breaking into new markets

Marketing

Carrier billing

Boost paid-user share

Price subsidization

Network QoS

## **Carriers' top reasons for partnering**

Boosting ARPU

Differentiation

User retention

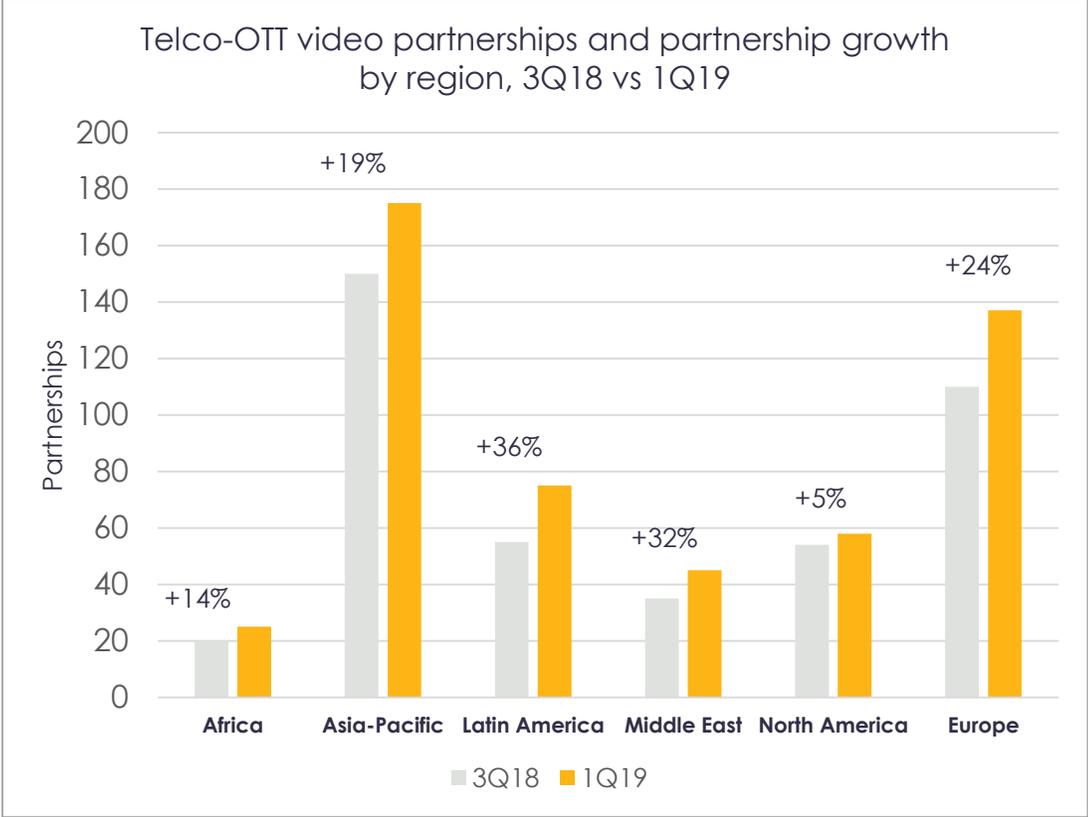
User acquisition

Update image

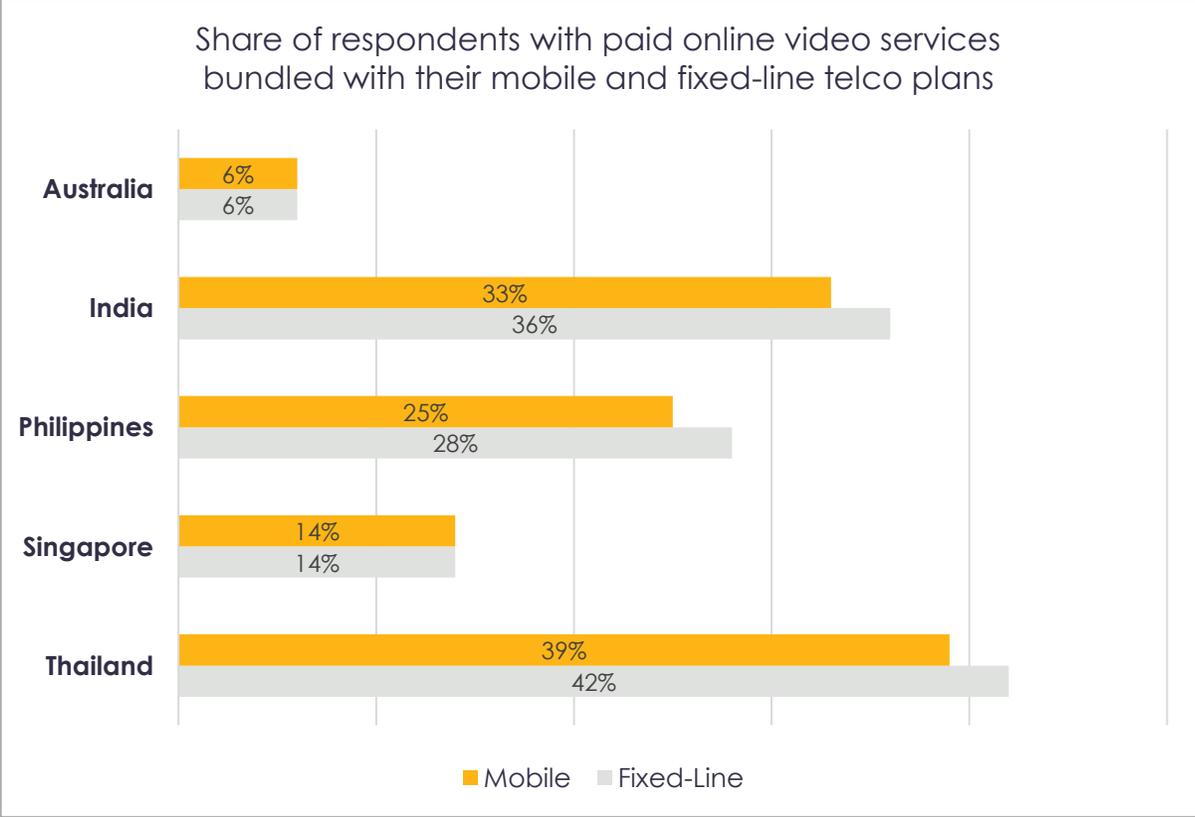
Promote new network



# Telco-OTT partnerships in Asia Pacific



Source: Ovum's Global OTT Video Bundling Deals and Service Partnerships Tracker



Source: Ovum

Source data: Amdocs' commissioned consumer survey. 3,940 total respondents across Australia, India, Philippines, Singapore, Thailand



# The main forms of Telco-OTT video partnerships

## Tariff bundling

OTT subscription is added to carrier subscription  
Full to zero subsidization by carriers

## Service integration

OTT service incorporated into carrier's own brand TV/Video service user interface (usually via an STB), as a standalone application – with or without carrier billing support.

## Data offers

Data consumption for OTT service is zero rated

## Carrier consumer offers resulting from telco-OTT partnerships

### “Service-on-us” offers

(i.e. hard bundling, where a premium OTT service is bundled with a telecoms tariff and its price is fully subsidized by the carrier, based on an agreed wholesale price)

### Extended free trial or discount offers

(i.e. soft bundling, where a premium OTT service is bundled with or bolted onto a telecoms tariff and its price is only partially subsidized by the carrier)

### No-discount “add-to-carrier-bill” offers

(i.e. bolt-ons or add-ons, where a premium OTT service is added to a subscriber's telecoms bill without any price subsidization from the carrier; this can also be in a service-integration context, in a pay-TV interface)

### Free data offers

(i.e. zero rating, where the data costs of an OTT service are fully subsidized by the carrier or, in a data-sponsorship case, by the OTT, or the carrier gives away an X number of GBs)

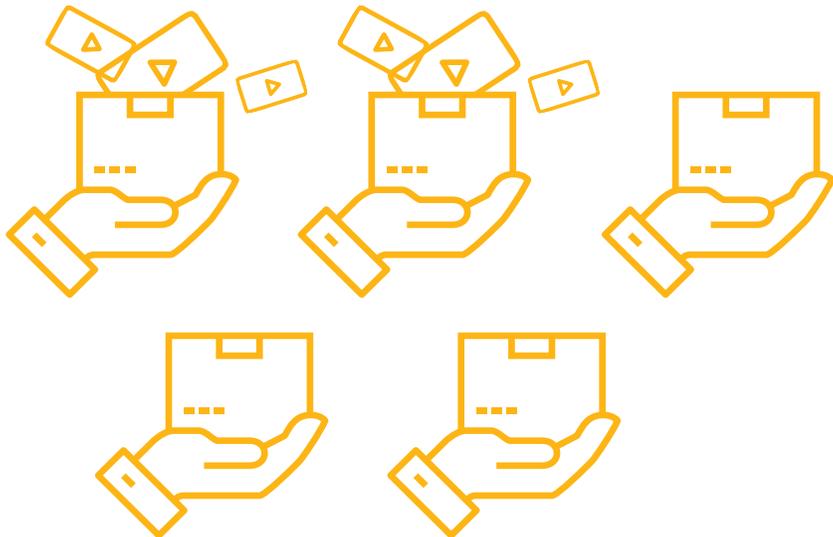
### Flat-fee data offers

(i.e. data passes, where the carrier offers a flat-fee data plan, often uncapped, for one or more OTT services on an also zero-rated or unmetered basis)

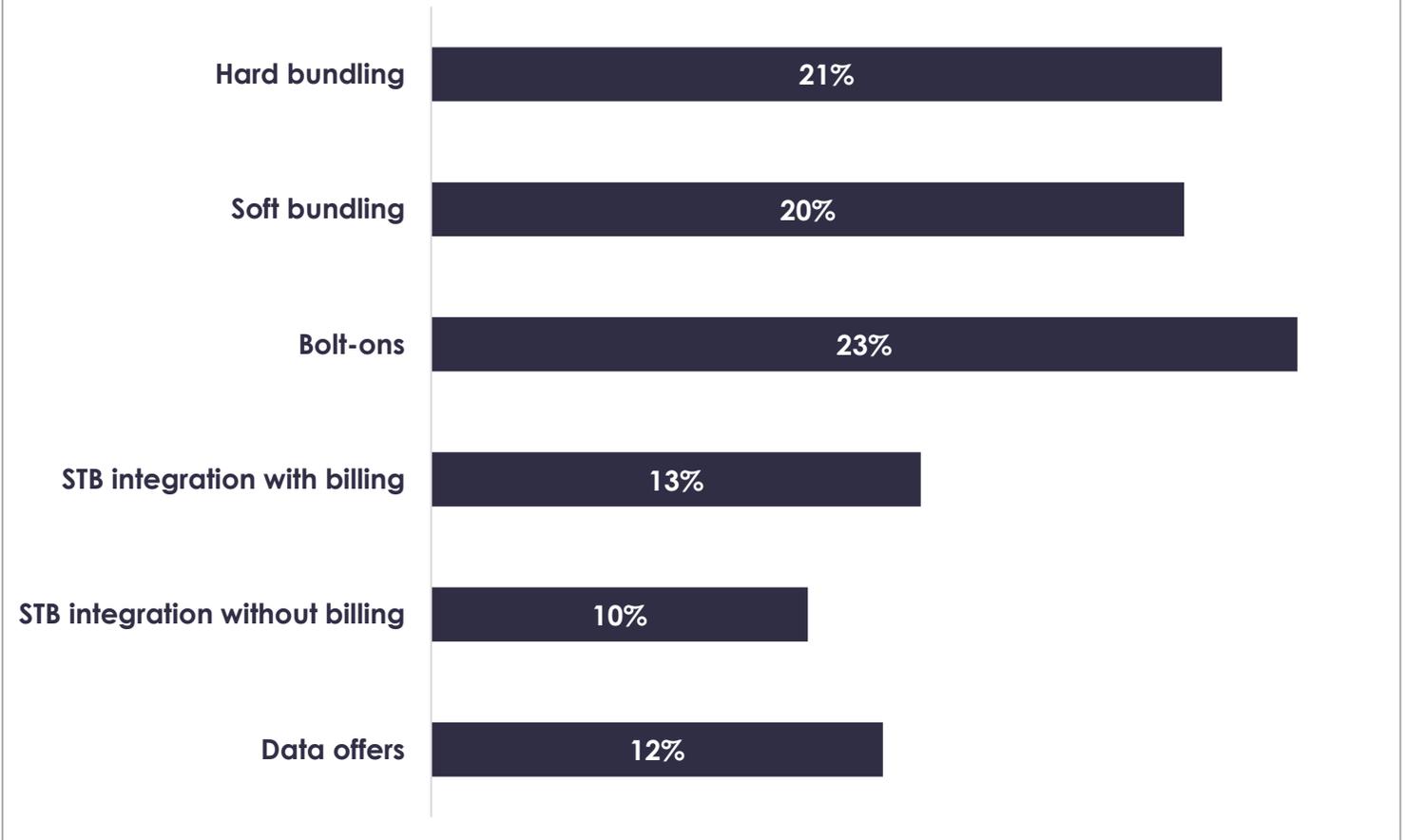
# Market share of partnership types

20% of telco – OTT video partnerships in the 5 countries are hard bundling, India being biggest contributor

In Australia, most partnerships are about integrating third-party apps into carriers' pay-TV set top boxes



Telco-OTT video partnerships, split by type, across Australia, India, Philippines, Singapore, Thailand



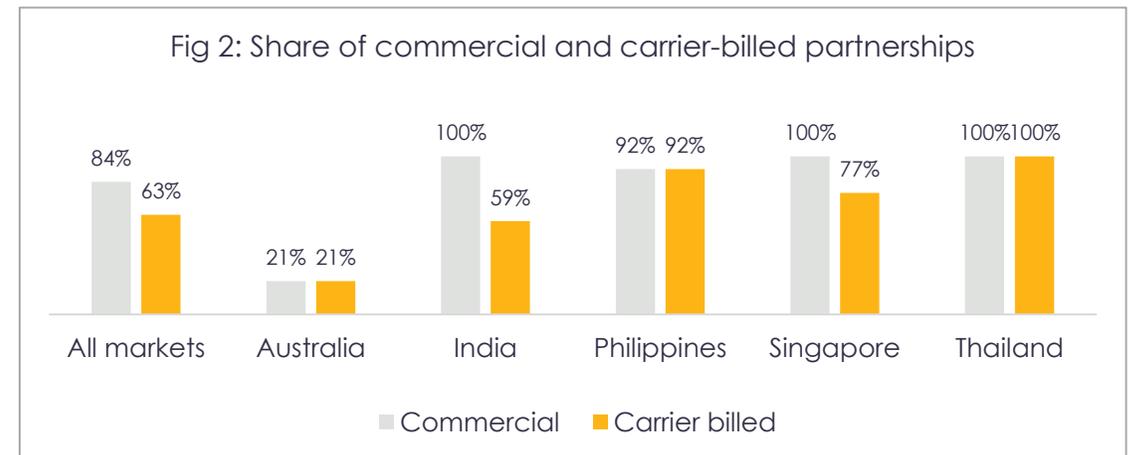
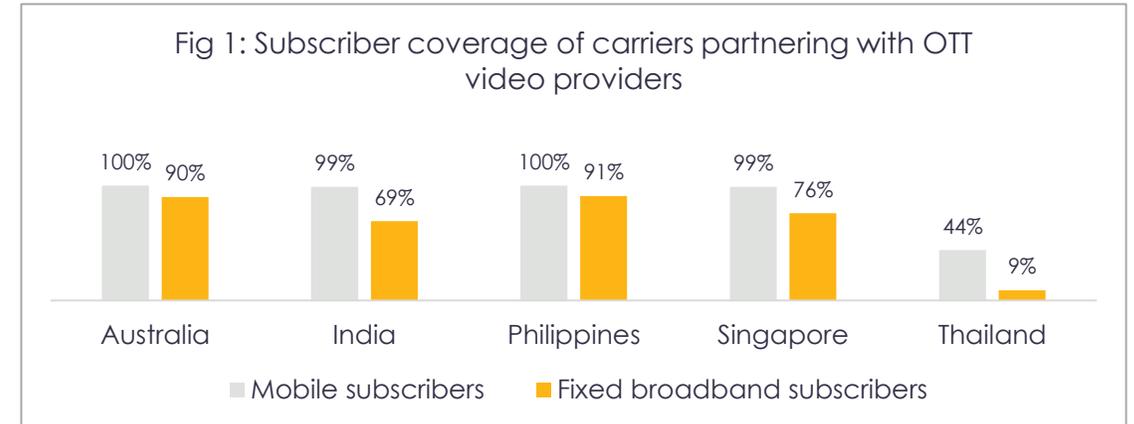
# Proportion of carrier partnering

Not all carriers in the study's five markets are partnering with OTT video providers, but in all but one country, all the major carriers are.

Thailand, only exception: only AIS is active in the partnerships space, with 44% and 9% market share of mobile and fixed broadband subscriptions

Some of the carriers that are partnering offer no billing support, beyond incorporating the cost of the OTT subscription into their tariffs – on a wholesale-deal basis.

But the majority of partnerships, 84%, are commercial, with carriers paying monies to OTTs either as buy-and-sell or carrier-billed revenue share deals (see fig. 2).



Source: Ovum's Global OTT Video Bundling Deals and Service Partnerships Tracker

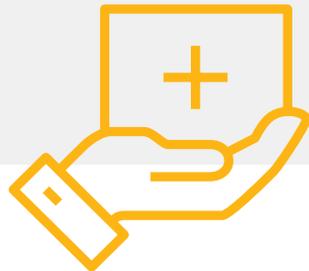
# Carriers: results from partnering

## Positive

Higher ARPU and higher data consumption

Better brand positioning: attract consumers for more than just basic telecommunication services

Reverse and arrest revenue decline, and in some cases, move to two-digit YoY growth



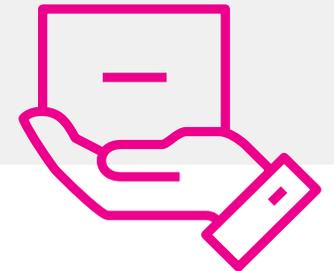
## Negative

It's getting harder to differentiate because OTTs are increasingly likely to partner with their rivals as well

This is particularly true of mature markets such as Australia

Mixed results: Some are able to increase ARPU, but not able to meet user acquisition targets.

Hard to measure results: It's challenging to make link between a KPI improvement, such as a rise in ARPU, and bundling an OTT service.



# OTTs: results from partnering

## Positive

Great success with penetrating new markets, and drive profitable growth

Lower user acquisition costs, and higher paid-user conversion rates

Saving on usual UA advertising costs

Interestingly, when the free trial period runs-out, the conversion rate from free to paying user is significantly higher than through D2C channels



## Negative

Backend integration challenges

Carriers not putting enough effort into promoting bundled services

Carriers struggle to craft clear marketing messages around bundle offers



# Technical challenges

**Backend integrations:** Top issue for both OTTs and carriers

Carriers insist on proprietary, process-heavy integration methods – slow and resource intensive

Each carrier has different systems and processes

Carriers are reluctant to provide OTTs with direct API access to their networks, fearing security breaches

Impact customer experience: users struggling to redeem their bundle offers the most common problem

## **Customer support**

Customer support duties are often not properly delineated between carrier and OTT, with both sides often playing ping-pong with queries



# Carrier approaches to integration with OTTs

Does the integration work itself

Works with network technology OEMs but even then often customises that technology in their labs.  
Doesn't expose APIs to third parties.

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Works with vendors to facilitate all the backend integration

OTTs are not allowed to touch the network in any way.

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Uses APIs as main way to integrate

Normally uses vendors or integrators nominated by the OTT, or from its own list of accredited integrators.  
Also, asks the OTT to supply all the product support solutions.

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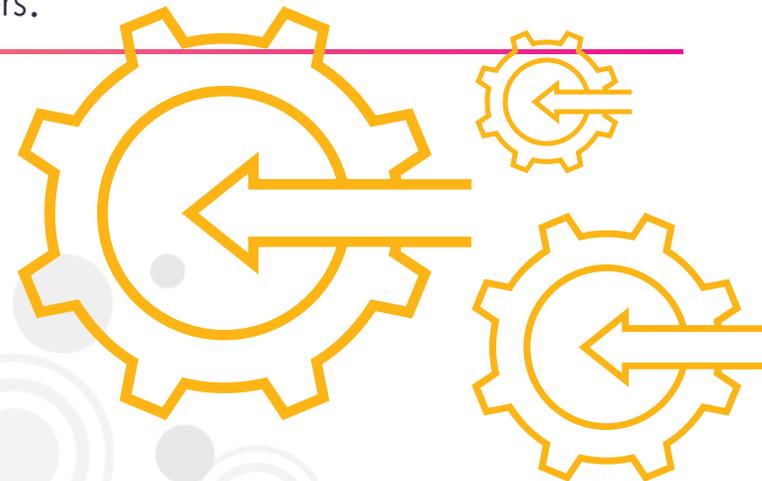
Telco tech teams work closely with the OTT partner tech teams

Huge in-house engineering team. Doesn't offer a set of APIs to partners.

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A cloud-based open-source API driven platform

Relies on partners to deal with content, distribution, aggregation,  
whilst it takes care of connectivity and devices.



# India

country view



# India offers multiple opportunities to grow OTT media subscriptions

India has not only the highest share of paid online video service users, but also multi video-subscription users. It also has one of the biggest shares of telco subscribers with bundled media services.

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India's telco-OTT video partnerships market has really heated up in recent years, with 7 carriers currently engaged with a slew of OTT brands, both local and foreign.

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Local content is important in India's online video market, with homegrown platforms such as Hotstar, Sony LIV, ZEE5 and Voot among the country's top providers, alongside the likes of Amazon and Netflix. And these local brands have greater prominence in rural areas.

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Nearly 60% of online users would not pay the average price charged in India for a standard online video subscription.

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Consumers are also happier to accept advertising and share their personal data for reduced bill.

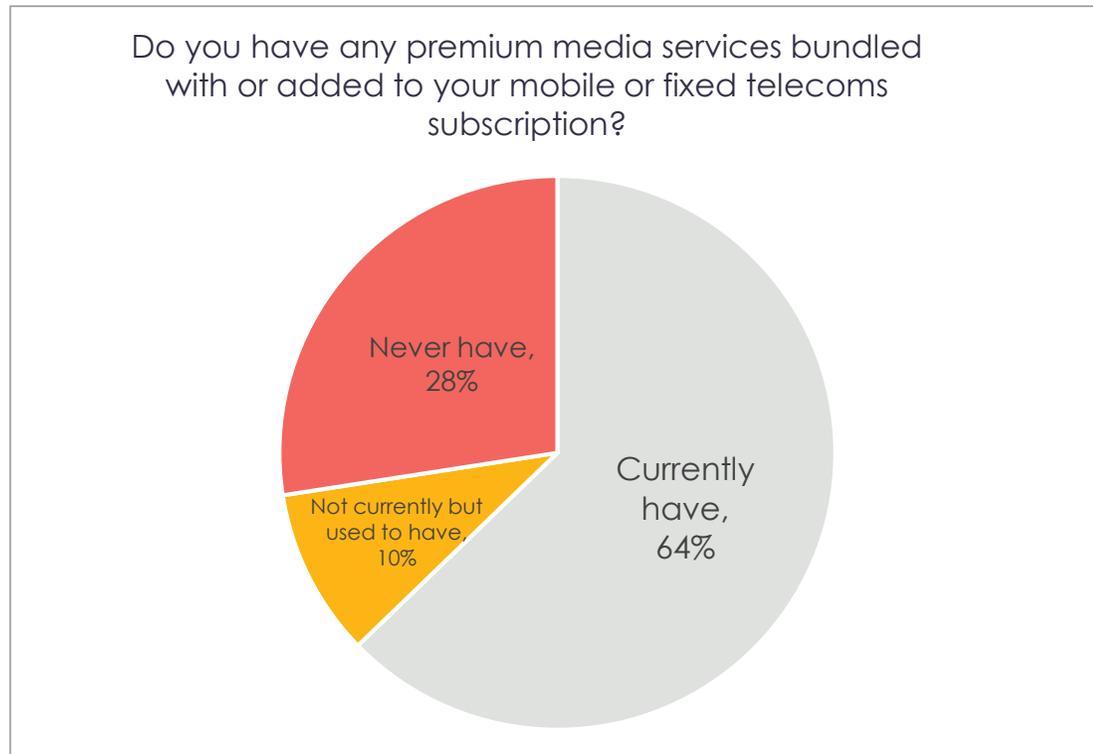
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Indians are most likely to churn to another network in pursuit of attractive carrier-bundled media. They are also among the most likely to remain loyal to a carrier given the right media offer.



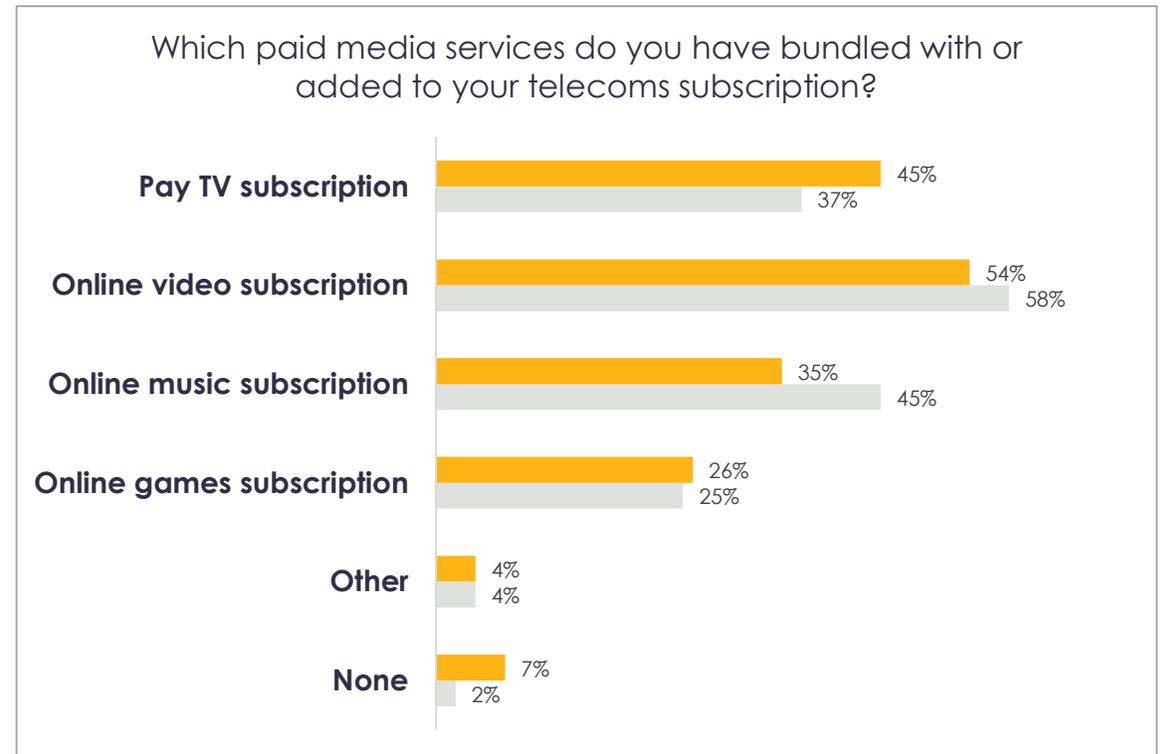
# India has one of the highest numbers of users with carrier-bundled paid media services

India has a relatively big share (2<sup>nd</sup> to Thailand) of users with carrier-bundled paid media services



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 2,102 total respondents in India

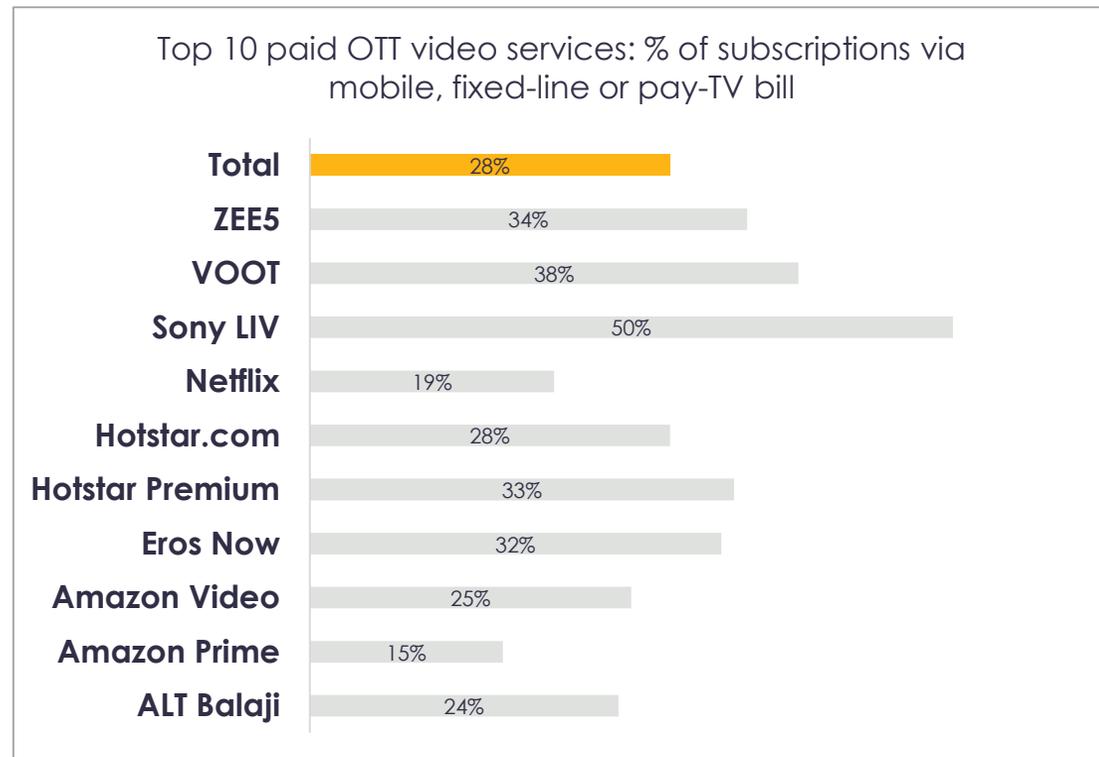
And the biggest chunk of users is bundling online video subscriptions



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 2,102 total respondents in India

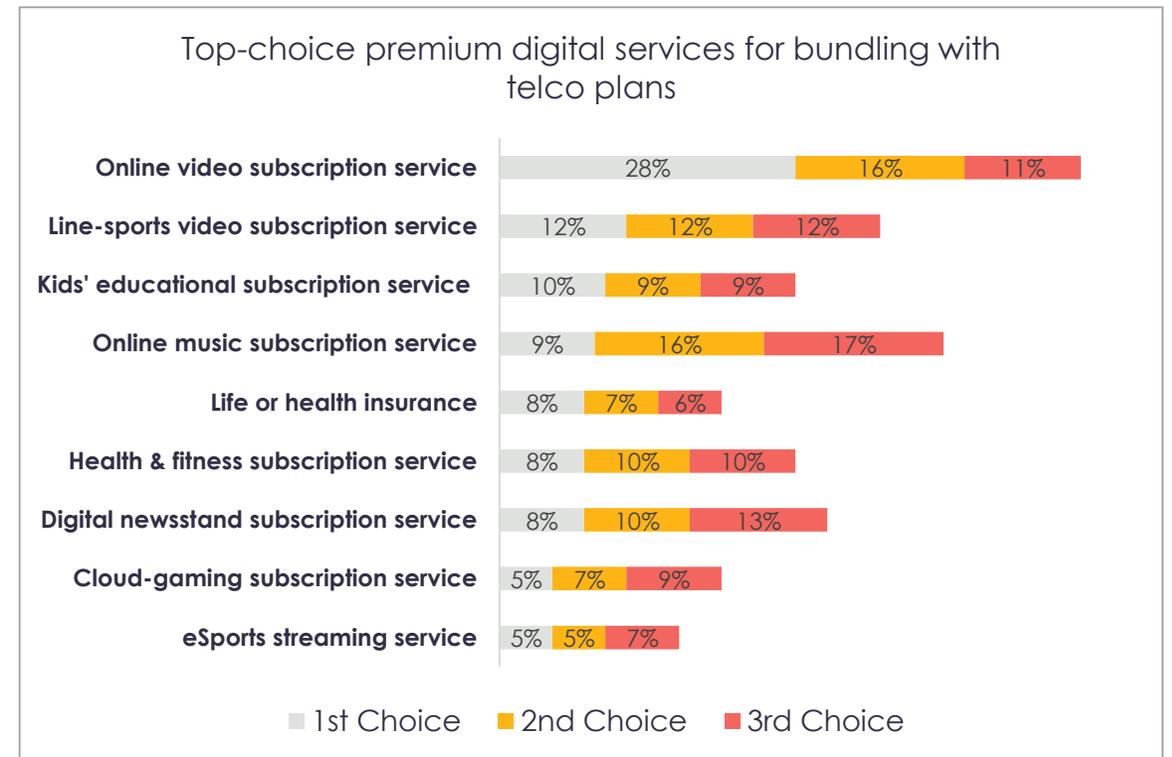
# India: Share of OTT video services on carrier bills and top consumer choices for bundling

India has the second largest share after Thailand of OTT video subscriptions via telco bills



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 2,102 total respondents in India

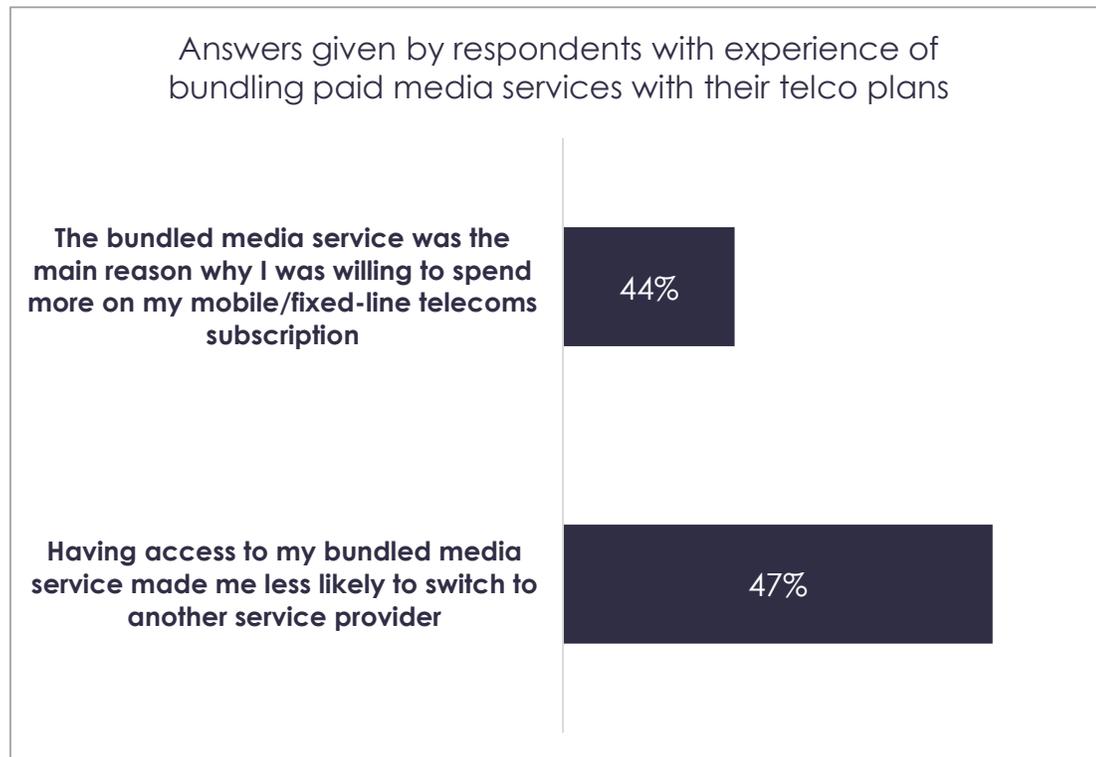
Kids' learning-thru-fun apps feature particularly highly in Indian consumers' top bundling choices



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 2,102 total respondents in India

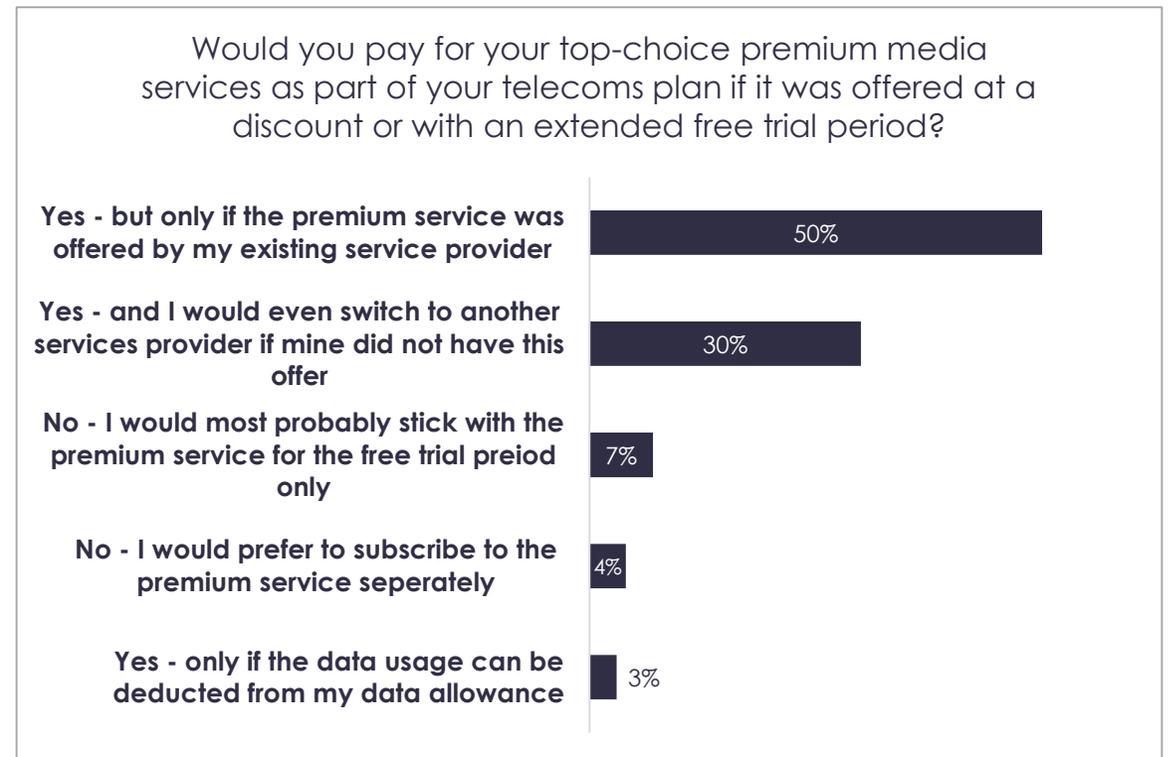
# Bundled OTT media service makes Indians spend more on mobile or fixed broadband subscriptions

Together with Thailand, India registers the strongest retention effects from bundling



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 2,102 total respondents in India

India shows the strongest user-acquisition potential from bundling, with 30% willing to churn



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 2,102 total respondents in India

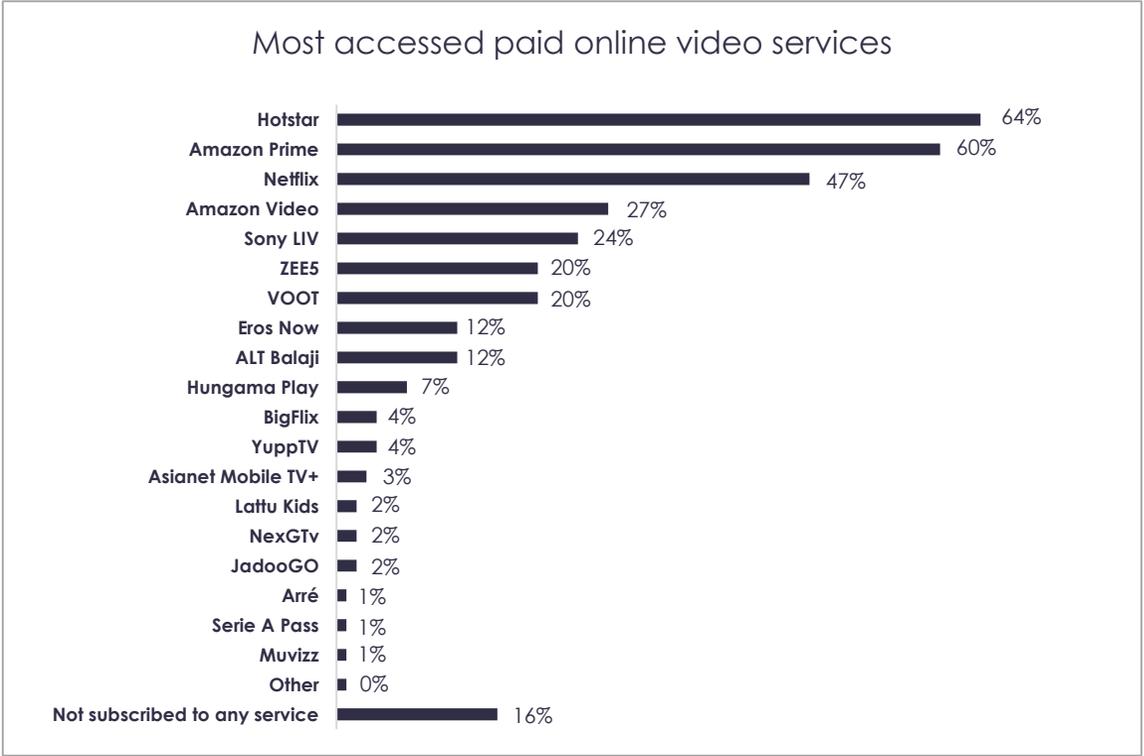
# Indians prefer access to multiple paid online video streaming services

India has by far the highest levels of multi-subscription access



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 2,102 total respondents in India

Local brands feature much more prominently among top online video services than elsewhere



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 2,102 total respondents in India



# Reasons for multi-video subscription ownership or for not subscribing at all

Plurality of tastes within households foremost reason for accessing more than one service



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 2,102 total respondents in India

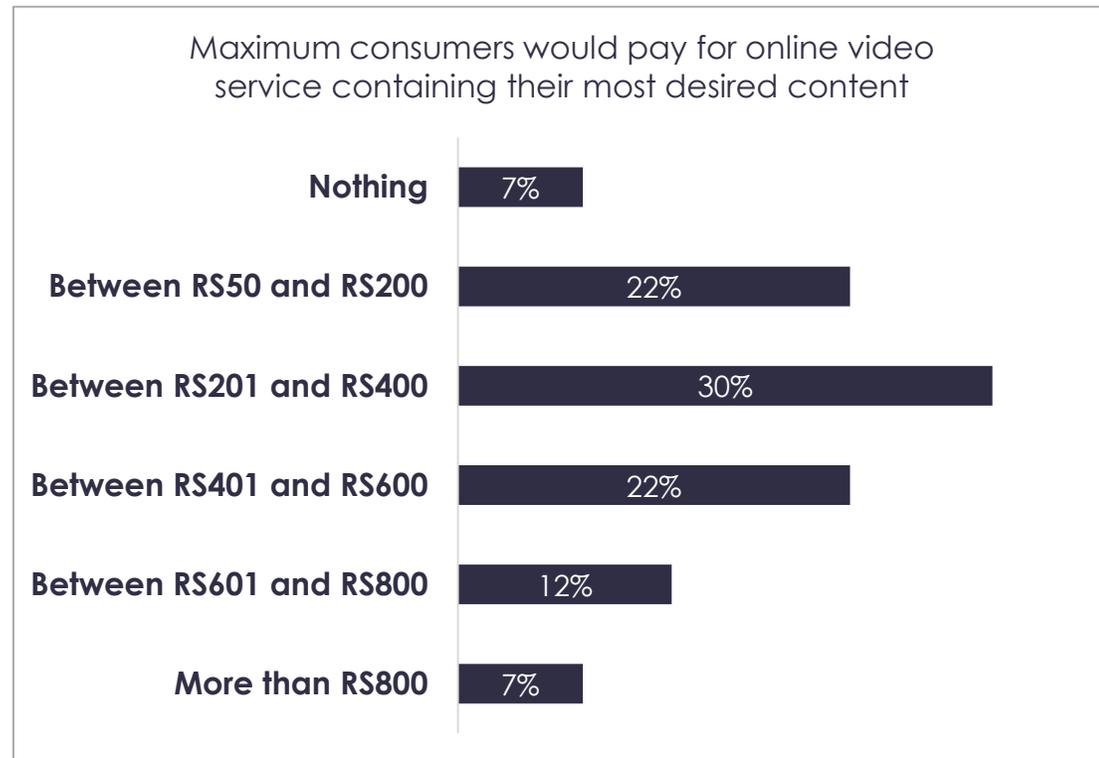
TV being "good enough" and unaffordability, two topmost reasons for not subscribing to video OTTs



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 2,102 total respondents in India

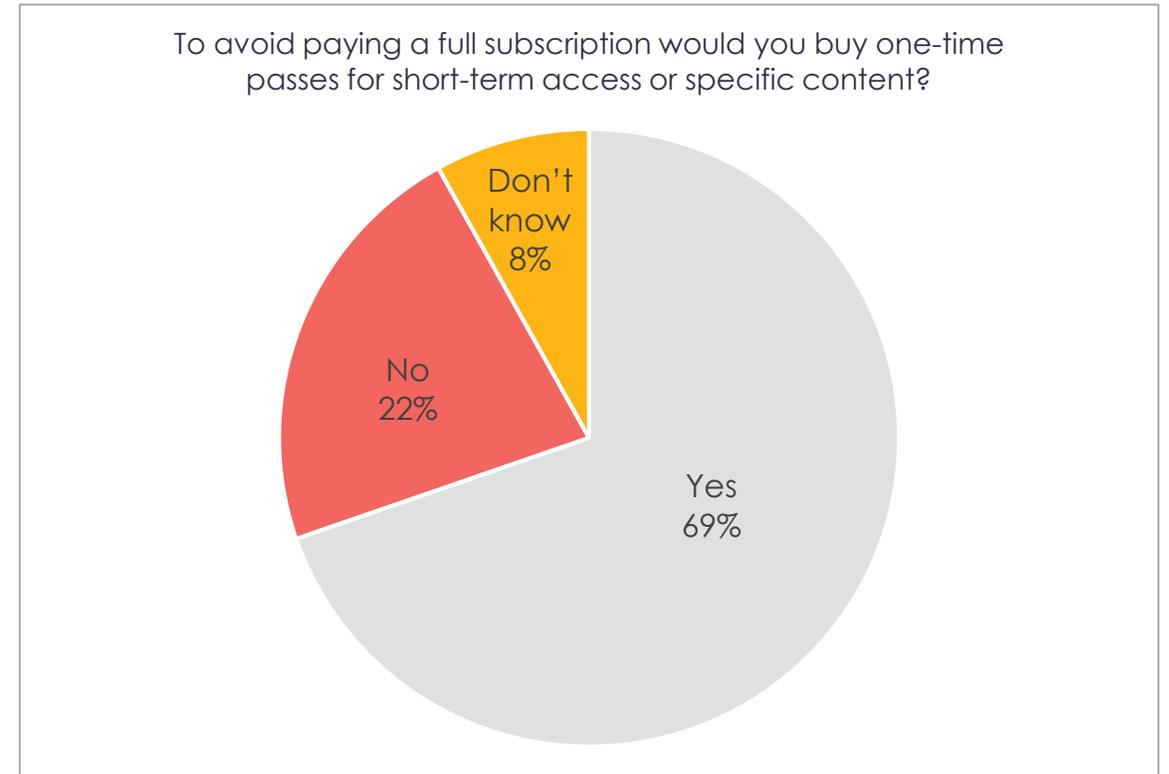
# OTT paid video service still expensive: Indians prefer pay-per-use over monthly subscriptions

With the average online video subscription costing RS306, 59% of consumers are outside its range



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 2,102 total respondents in India

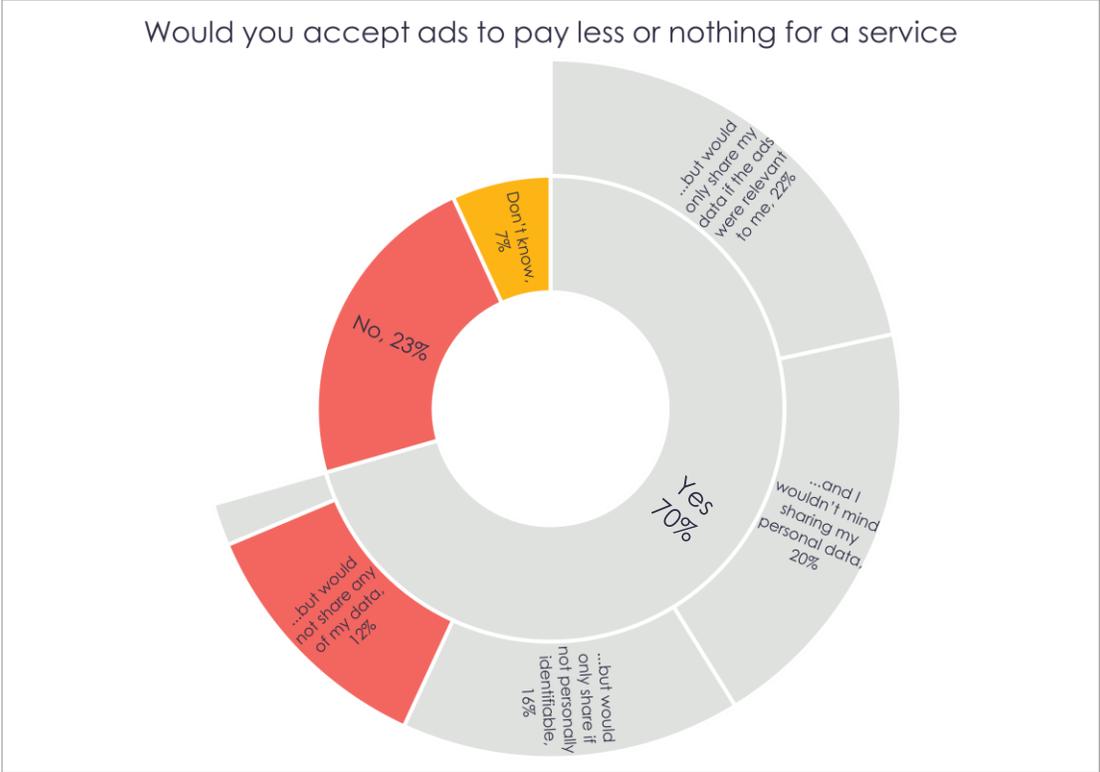
India is second only to Philippines in consumer openness to one-time passes



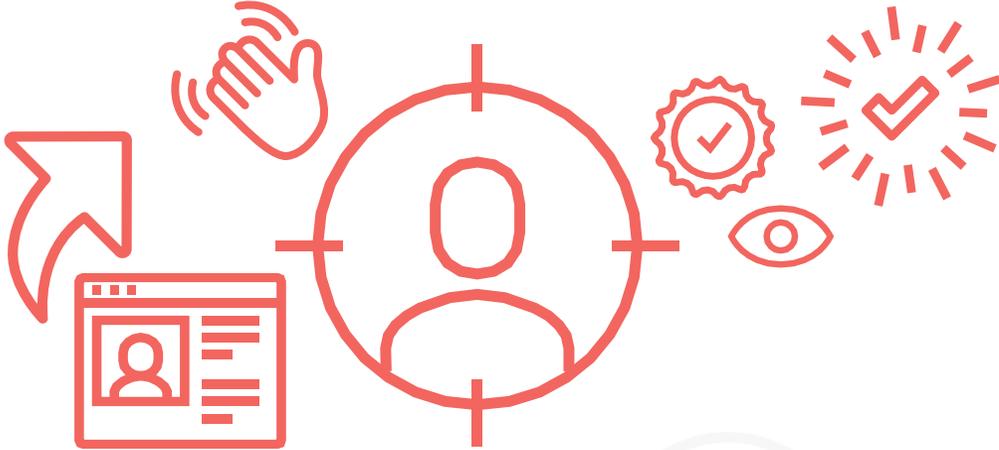
Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 2,102 total respondents in India

# Indians won't mind sharing personal data or getting ads in return for reduced OTT cost

70% would accept advertising, but...



Source: Ovum  
Source data: Amdocs' commissioned consumer survey, 2,102 total respondents in India



# Philippines

country view



# Philippines offers multiple opportunities to grow OTT media subscriptions

Online video services market is dominated by foreign brands, both global (namely Netflix, Amazon and Fox+) and regional (namely iFlix, Hooq and Viu)

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A greater proportion of subscriptions sold by the regional brands (31-51%) and global brands (18-43%) is bundled with or billed via local carriers.

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A smaller proportion of respondents with carrier-bundled media services as compared to other two emerging markets (India and Thailand)

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Biggest percentage of ex-bundler respondents – a reflection perhaps of a market in which telco-OTT bundling deals have been part of the landscape for longer

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Filipinos are highly receptive to alternative service funding models such as advertising and one-time passes

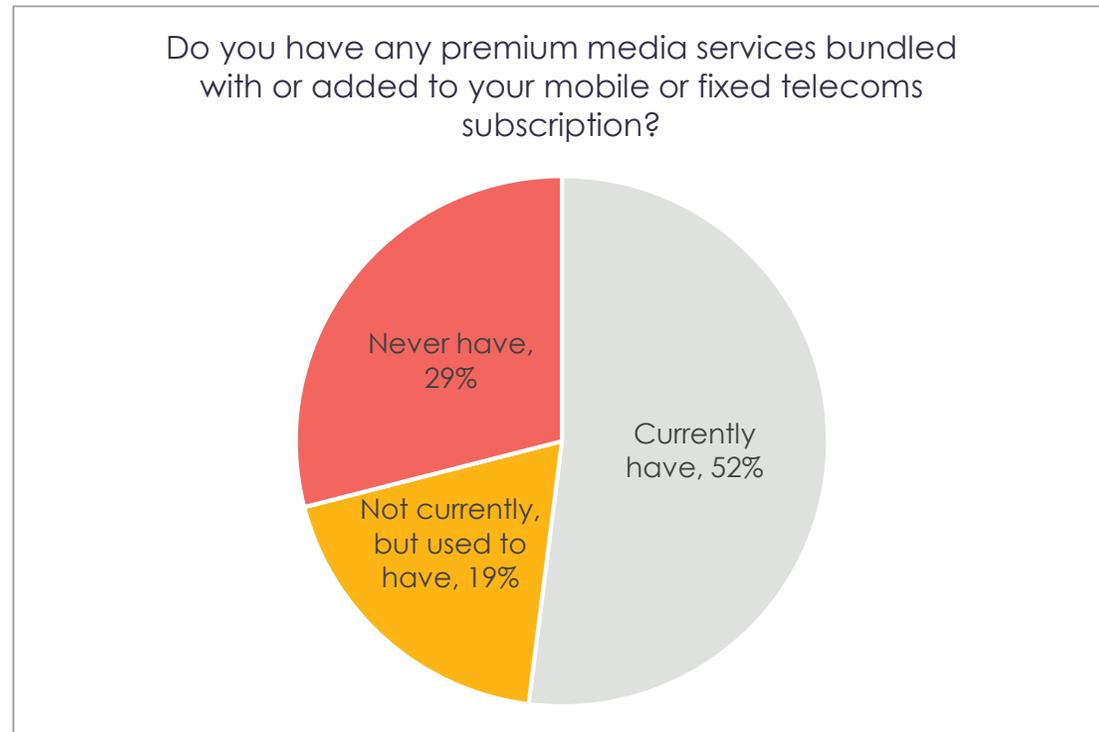
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Foreign content is important in the Philippines. Foreign movies are the second-most desired TV/video content by urban Filipinos.



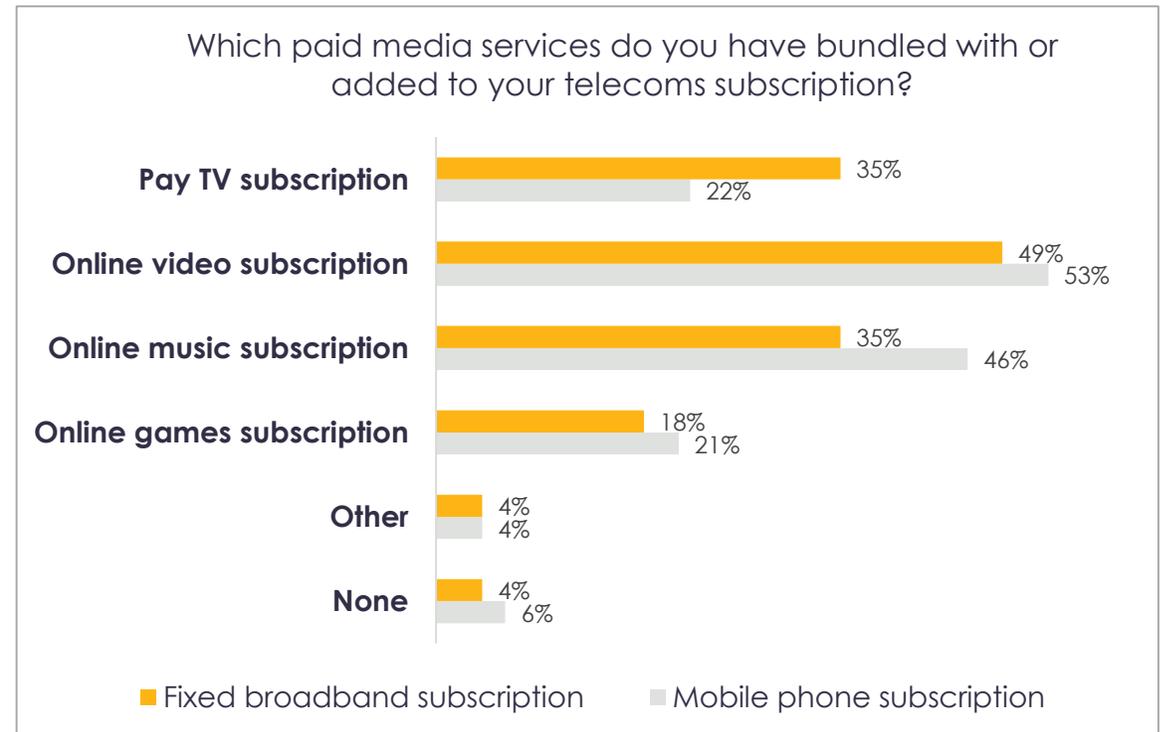
# Only half of Filipinos are subscribed to bundled OTT media: great opportunities to add more consumers

Out of the emerging markets in the study, the Philippines has the most non-bundlers



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 787 total respondents in the Philippines

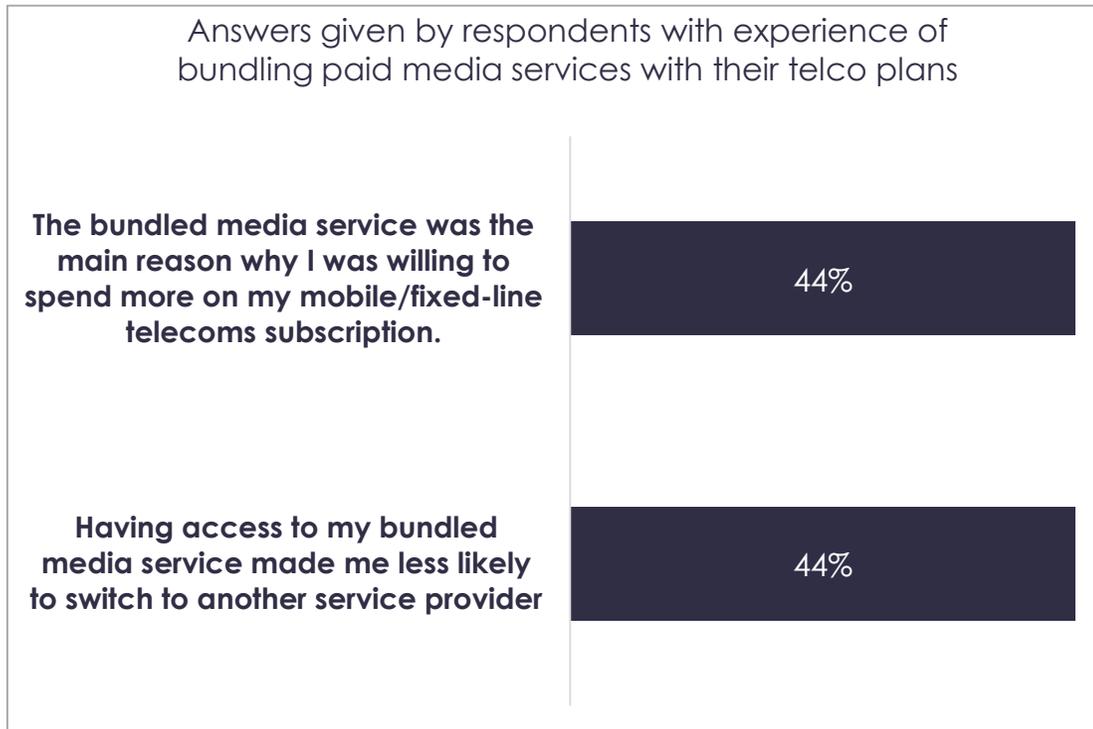
As with the other emerging markets, online video subscriptions are what Filipinos most bundle



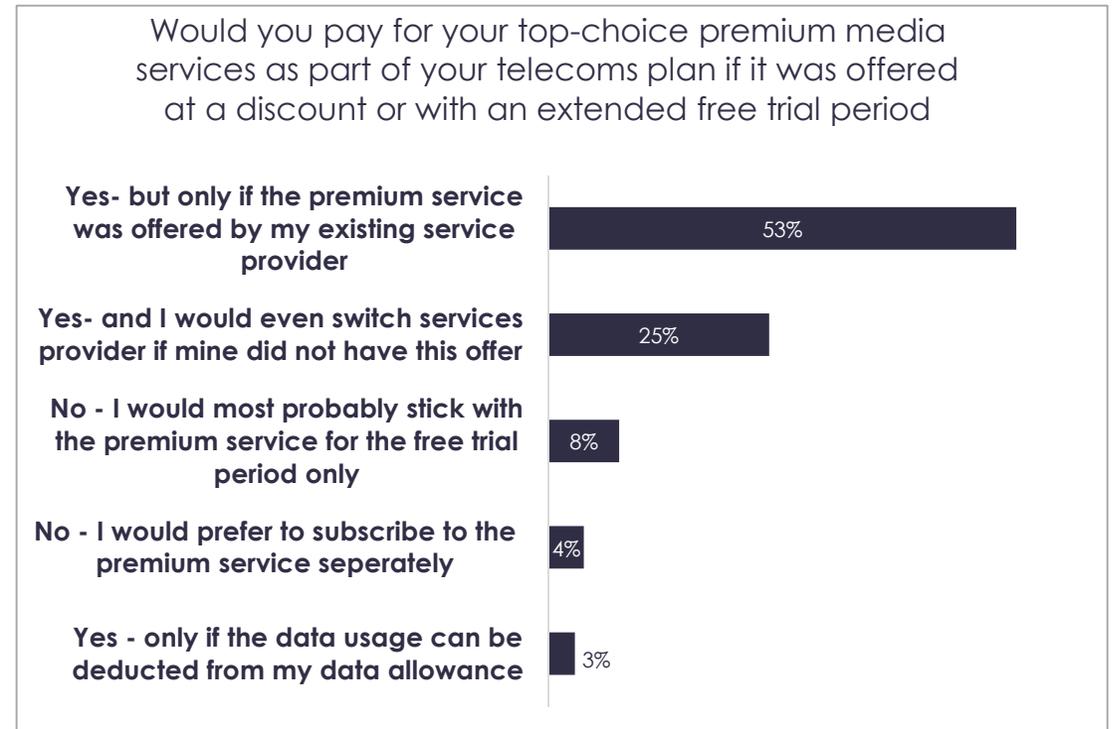
Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 787 total respondents in the Philippines

# Bundled OTT media service makes Filipinos spend more on mobile or broadband subscriptions

25% Filipinos are likely to churn to chase an attractive bundle offer from another carrier



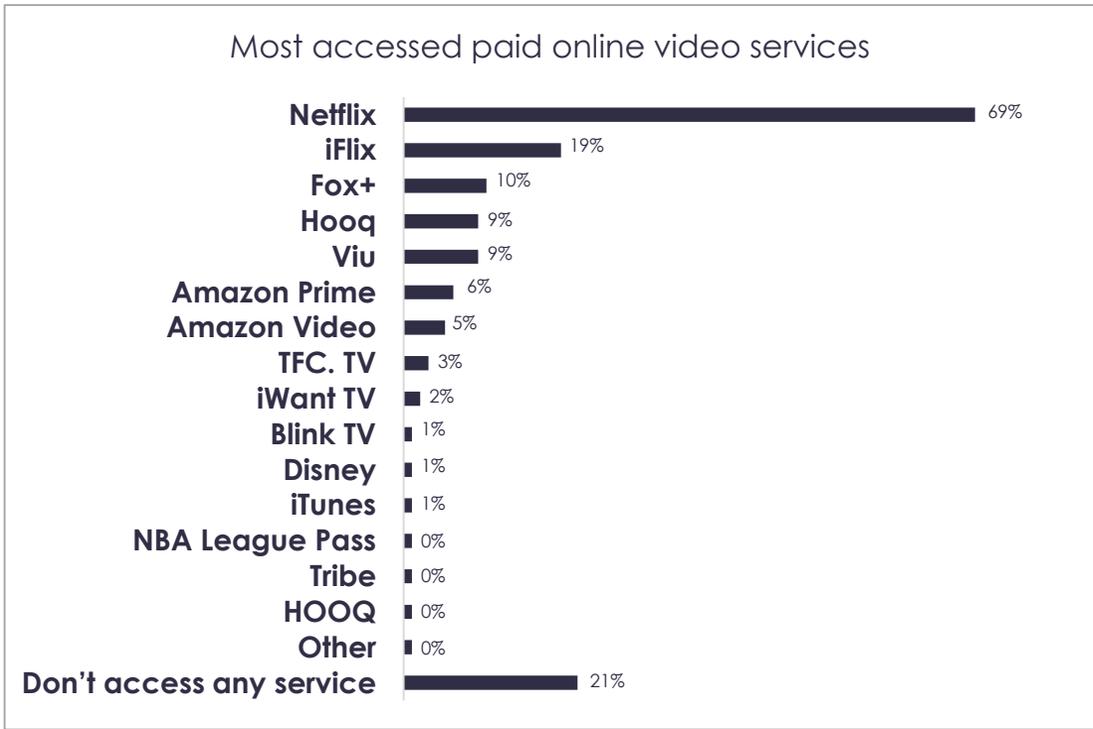
Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 787 total respondents in the Philippines



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 787 total respondents in the Philippines

# Filipino online users are the second-most avid consumers of paid online video

Foreign brands, both regional and global, dominate viewership numbers in the Philippines



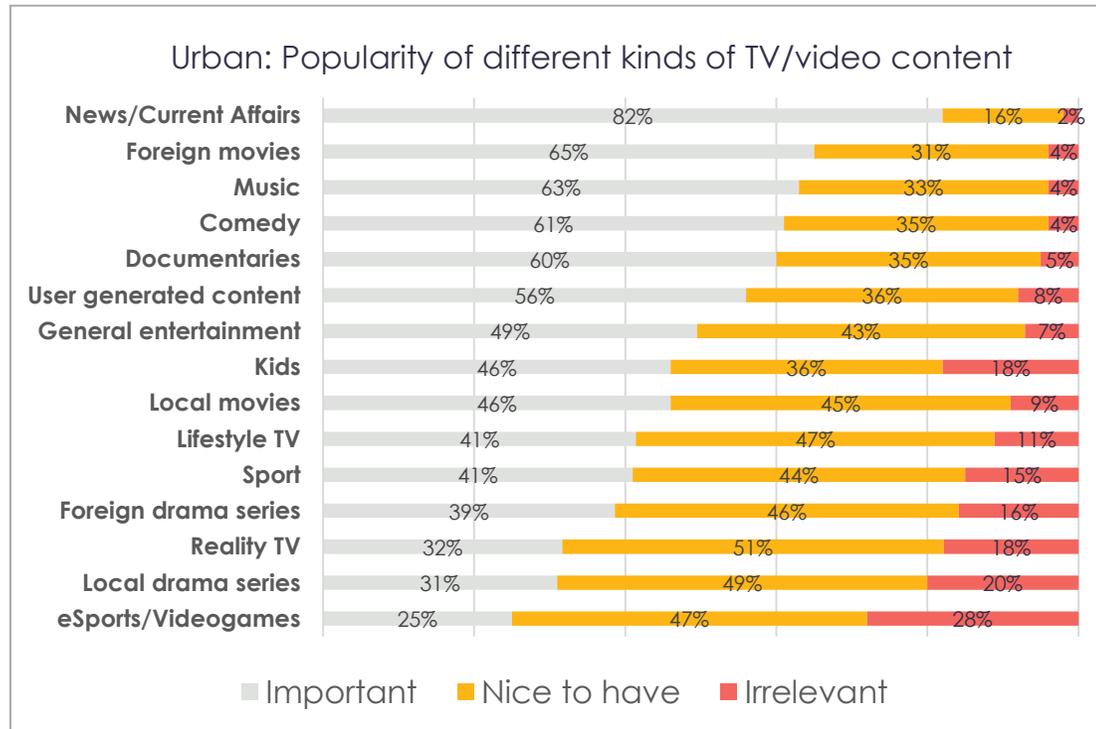
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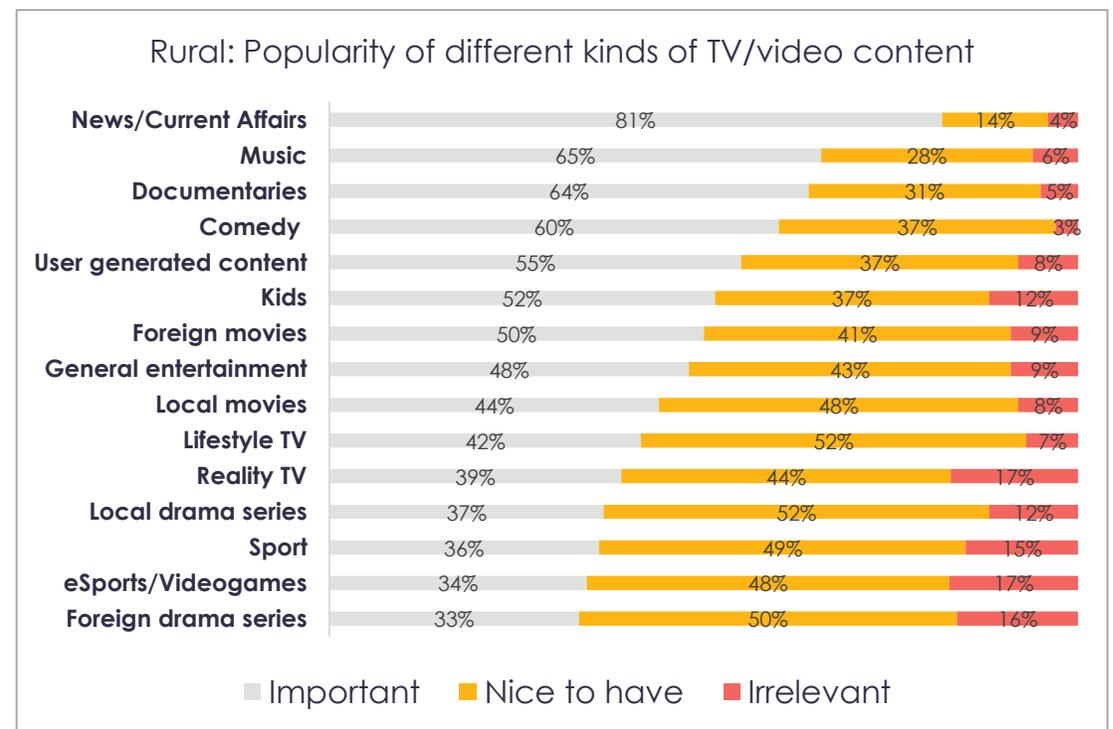
# Philippines: Rural/urban differences in most popular TV/video content

There is a stronger appetite for foreign movies and foreign drama series among urban Filipinos



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 787 total respondents in the Philippines

Documentaries, kids' content and reality TV index higher among rural Filipinos

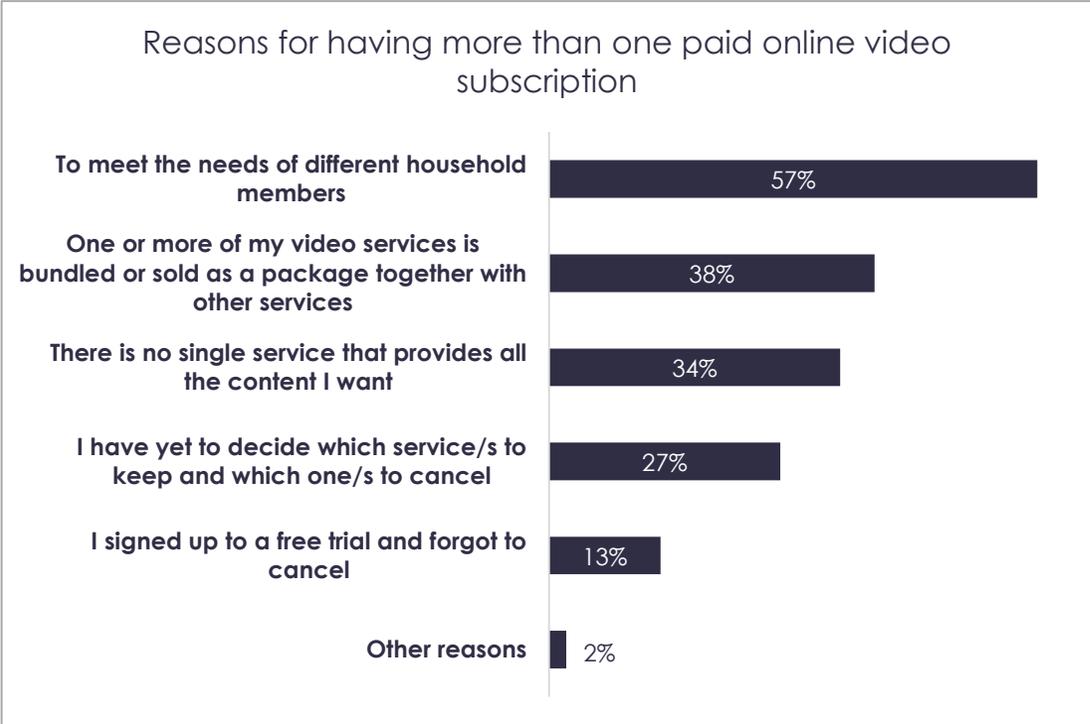
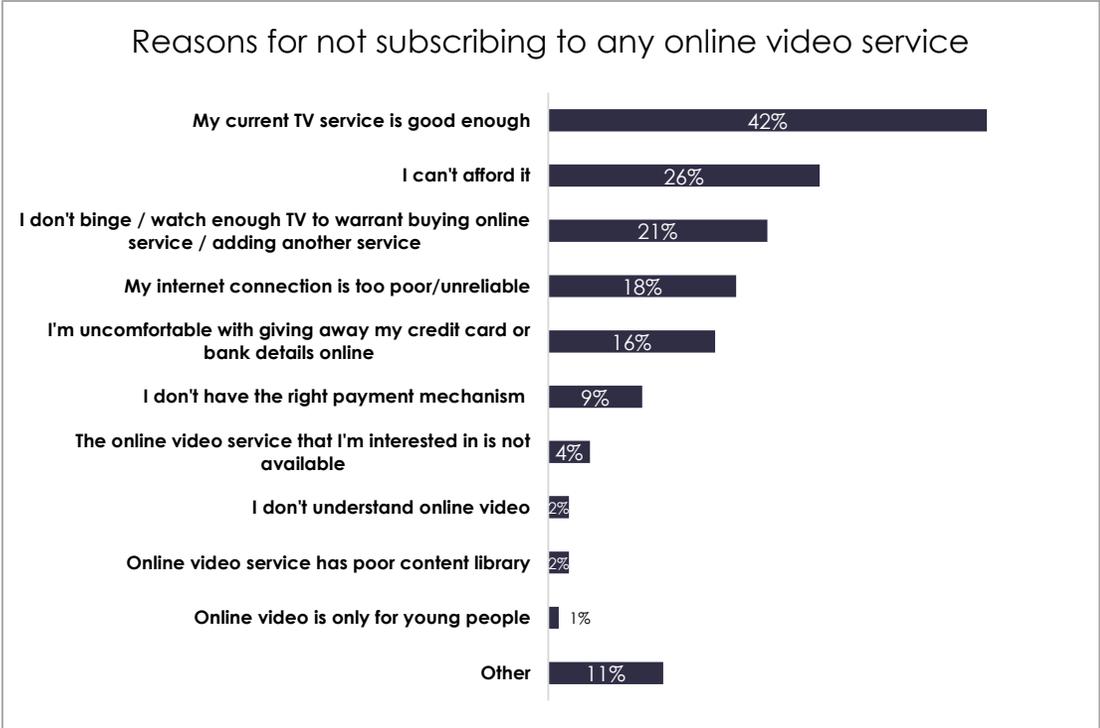


Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 787 total respondents in the Philippines

# Opportunity to increase number of subscribers and share of multi-subscriptions

Beyond satisfying different household tastes, free bundle offers also explain multi-subscription access

TV being “good enough” and unaffordability, also two topmost reasons for not accessing paid video



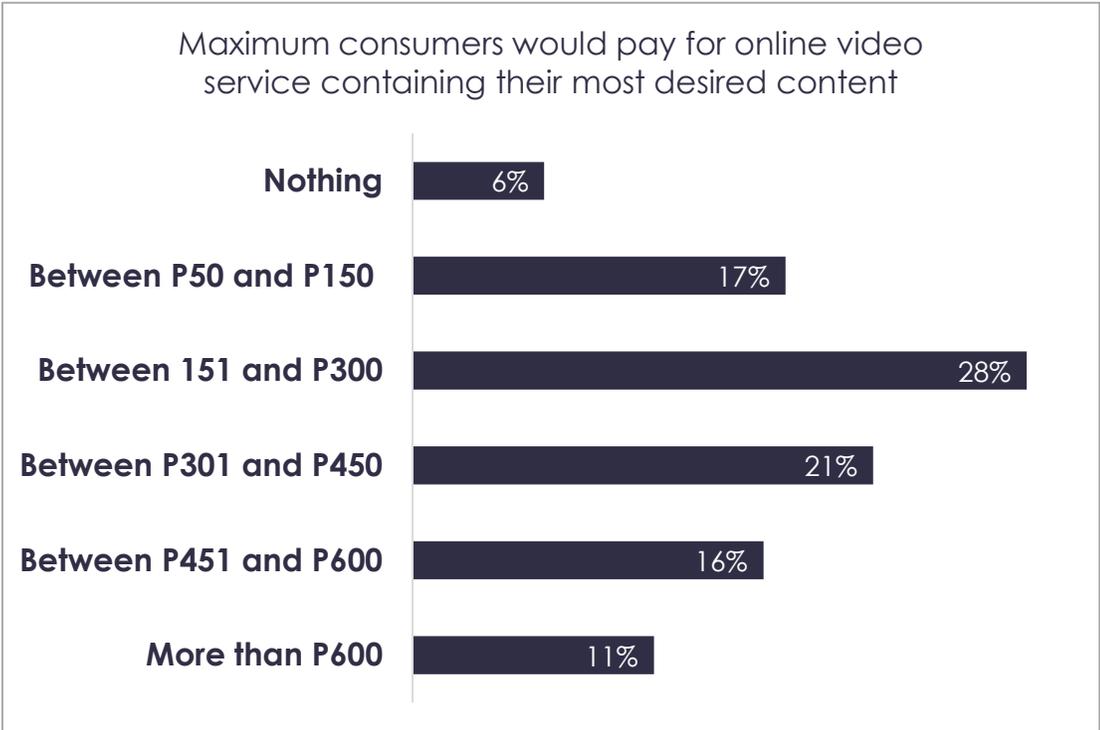
Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 787 total respondents in the Philippines

Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 787 total respondents in the Philippines



# OTT media is still expensive for most Filipinos

With the average online video subscription costing P242, 51% of consumers are outside its range

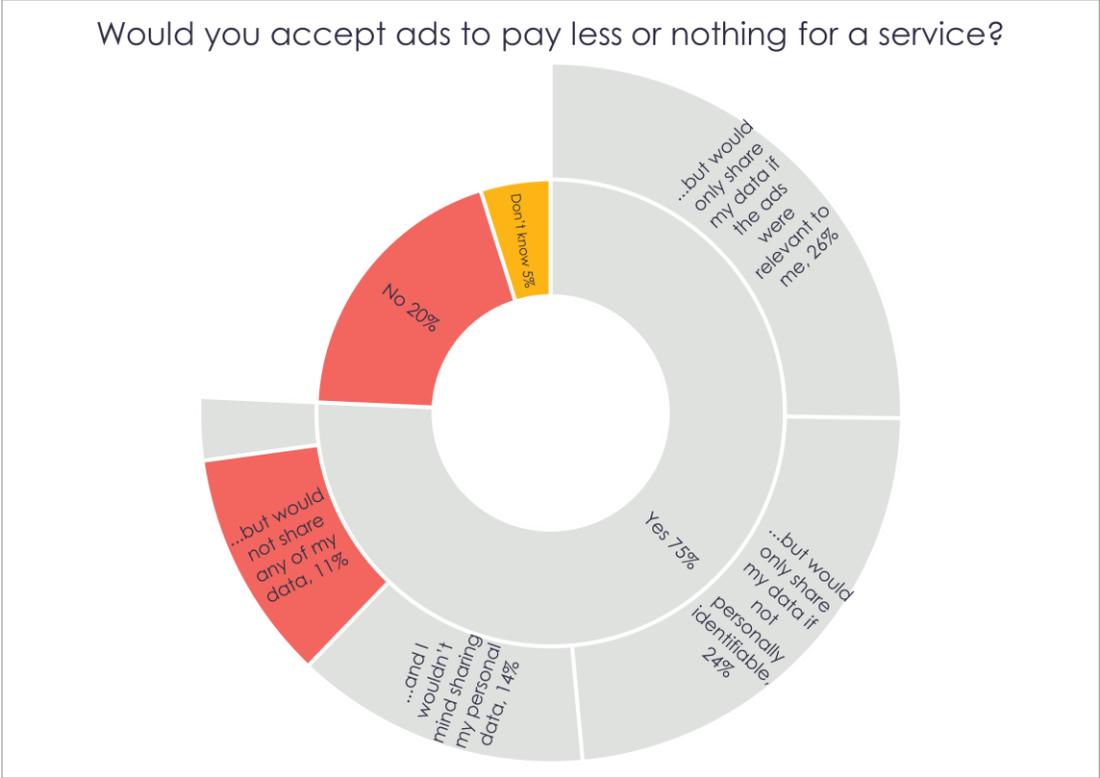


Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 787 total respondents in the Philippines



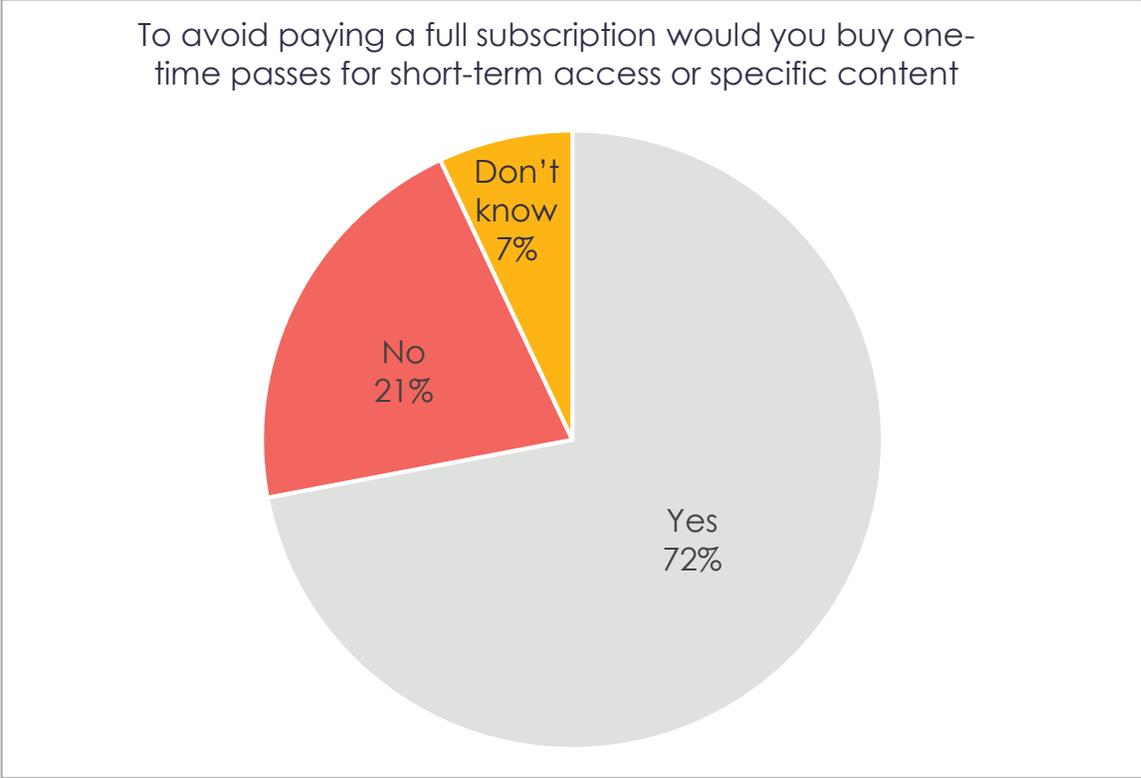
# Filipinos are okay with ads and one-time passes for short-term access if it reduces their bill

Filipinos the second-most amenable to advertising



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 787 total respondents in the Philippines

Filipinos are the most amenable to one-time passes out of the five markets surveyed

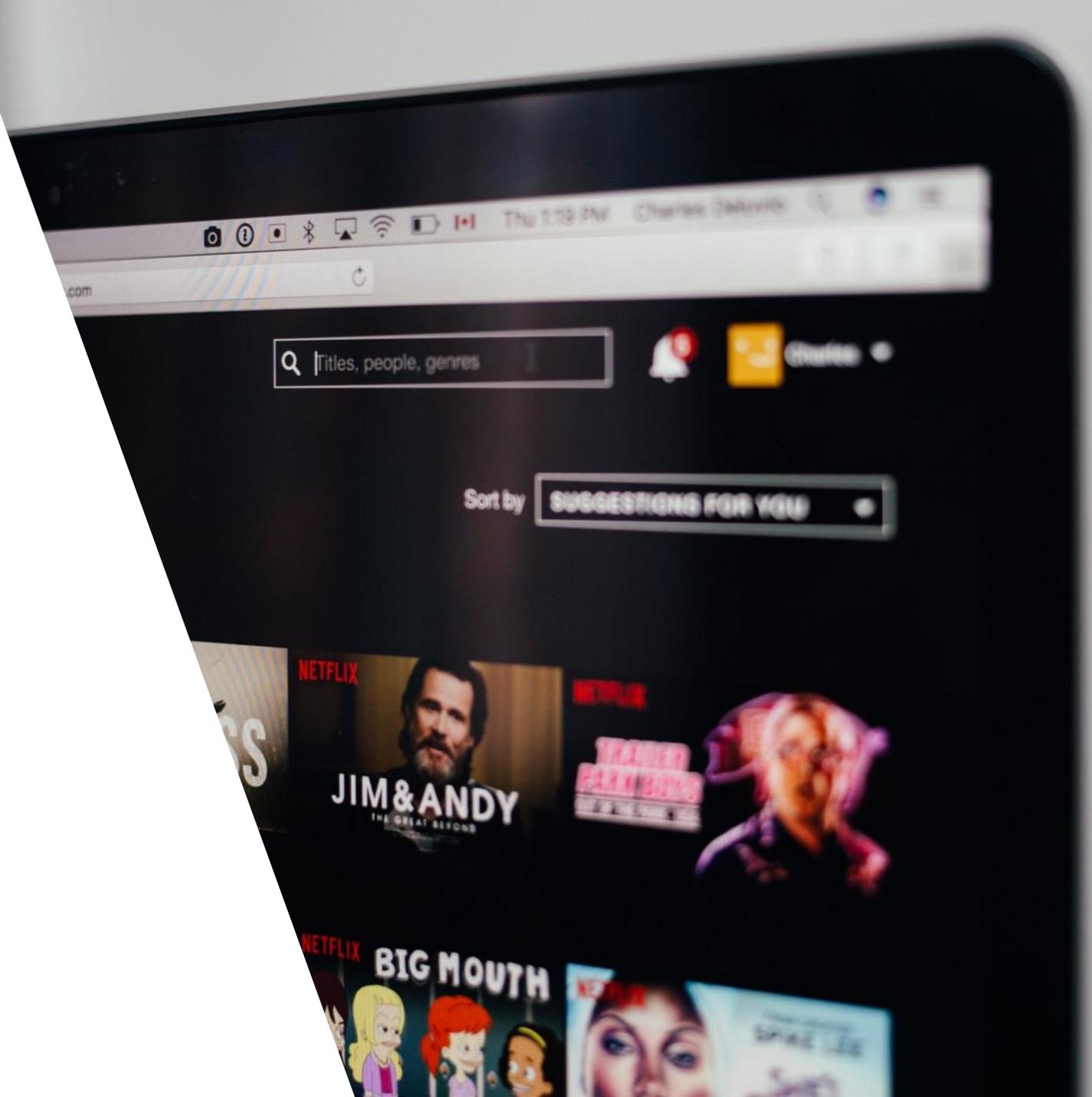


Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 787 total respondents in the Philippines



# Singapore

Country view



# Relatively low number of paid OTT media subscriptions in Singapore: multiple opportunities for growth

Singapore has some close similarities with the Australian market: the number of respondents subscribing to paid online video services is relatively low; so is the number reporting having media services bundled with their carrier plans; and carrier subscribers more commonly bundle pay TV services rather than OTT video services.

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Also, local OTT video services have weight, and strong links to the pay-TV/telco worlds. Although Netflix is the dominant premium OTT player, pay-TV spinoff StarHub Go and Singtel-owned Hooq are among the top five providers.

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Foreign content is extremely important to Singaporeans, with foreign movies and drama series ranking high among their most desired TV/video content. This includes the predominantly Chinese content of regional brand Viu.

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There are plenty of tie-ups between local carriers and video OTTs, of a varied assortment, including: hard bundles with the likes of Amazon Prime, HBO Go, and BBC Player; soft bundles with the likes of Fox+, Hooq and Viu; and numerous STB and portal integrations. Carrier billing features prominently across all three types.

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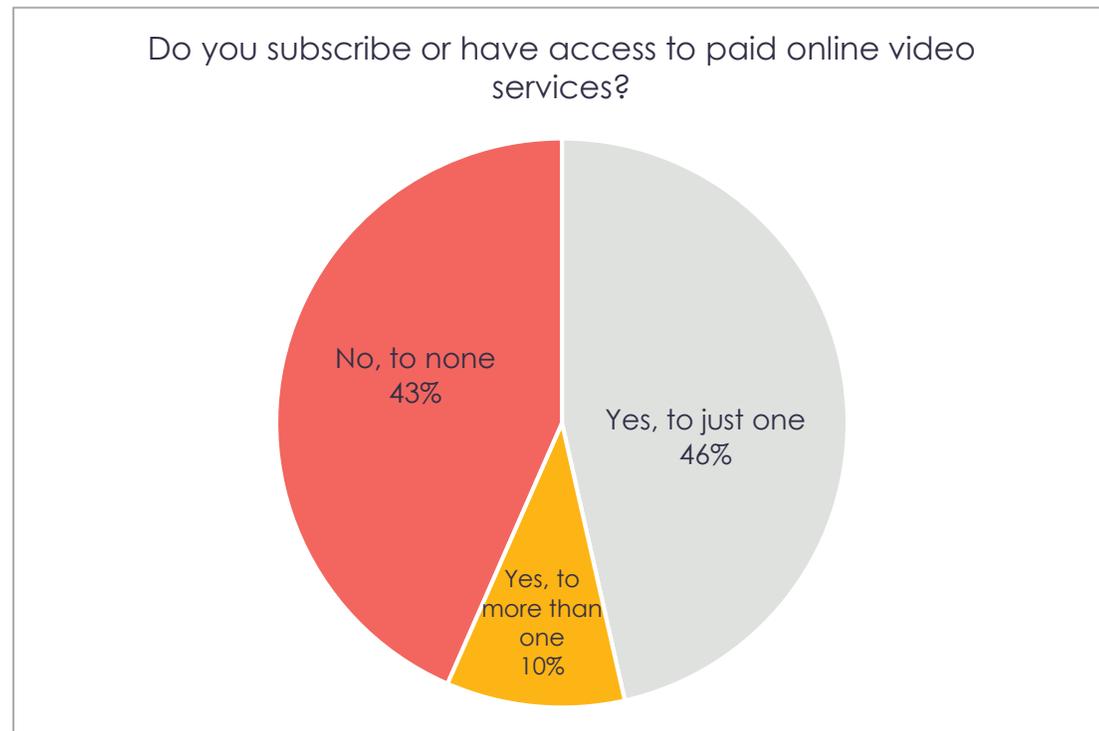
Although Singaporean respondents reported the lowest tendency to spend more on their carrier plans because of bundled media, their likelihood to churn in pursuit of an attractive bundle offer is relatively high.

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Singapore has the dearest online video subscription prices in relation to the ceiling respondents said they would pay. But fewer than half of respondents are prepared to both accept ads and share their data with advertisers.

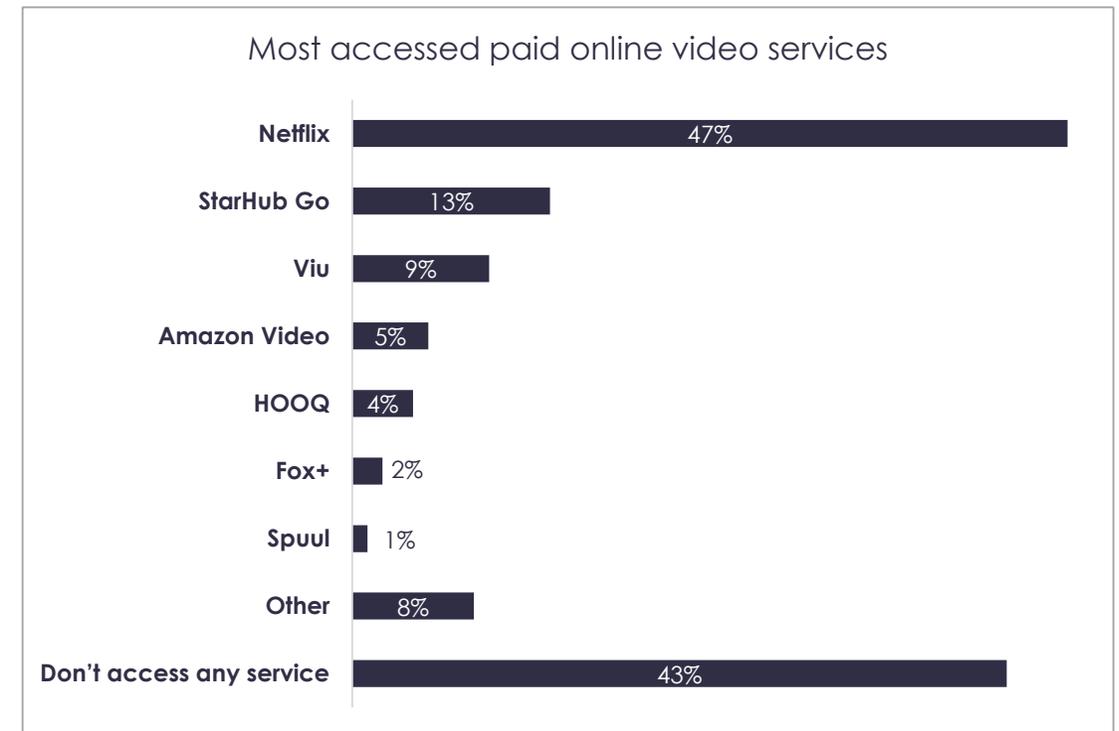
# Almost half of Singaporean online users are not subscribed to paid OTT video service

Like Australia, Singapore has a relatively high share of online users not subscribed to paid video



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 262 total respondents in Singapore

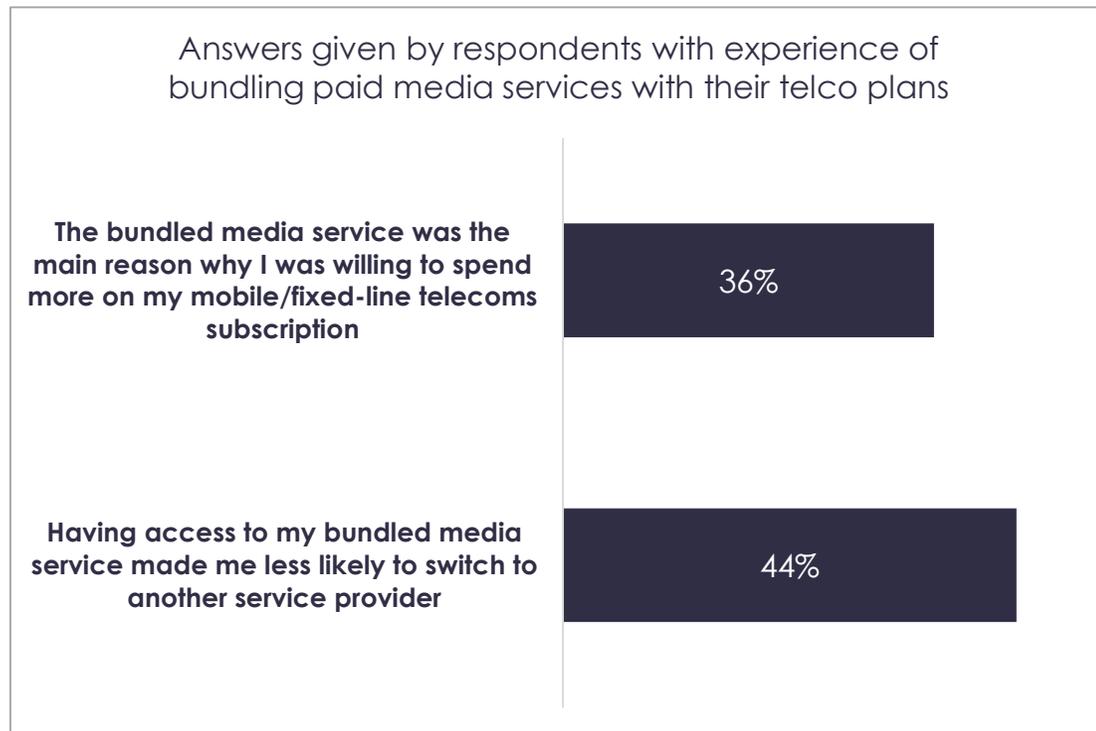
Hooq's penetration is lower in its home market than in many of the other markets surveyed



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 262 total respondents in Singapore

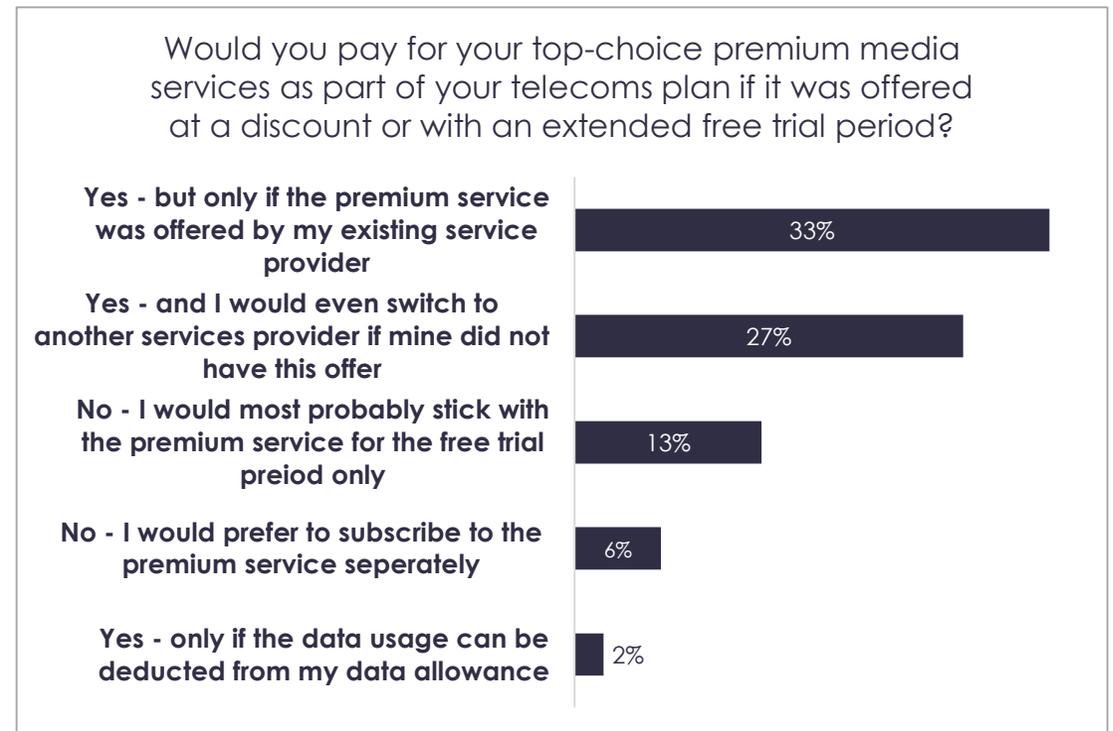
# Bundled OTT media service makes Singaporeans less likely to switch service providers

Singaporeans report the weakest effect on carrier-tariff spending from bundling



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 262 total respondents in Singapore

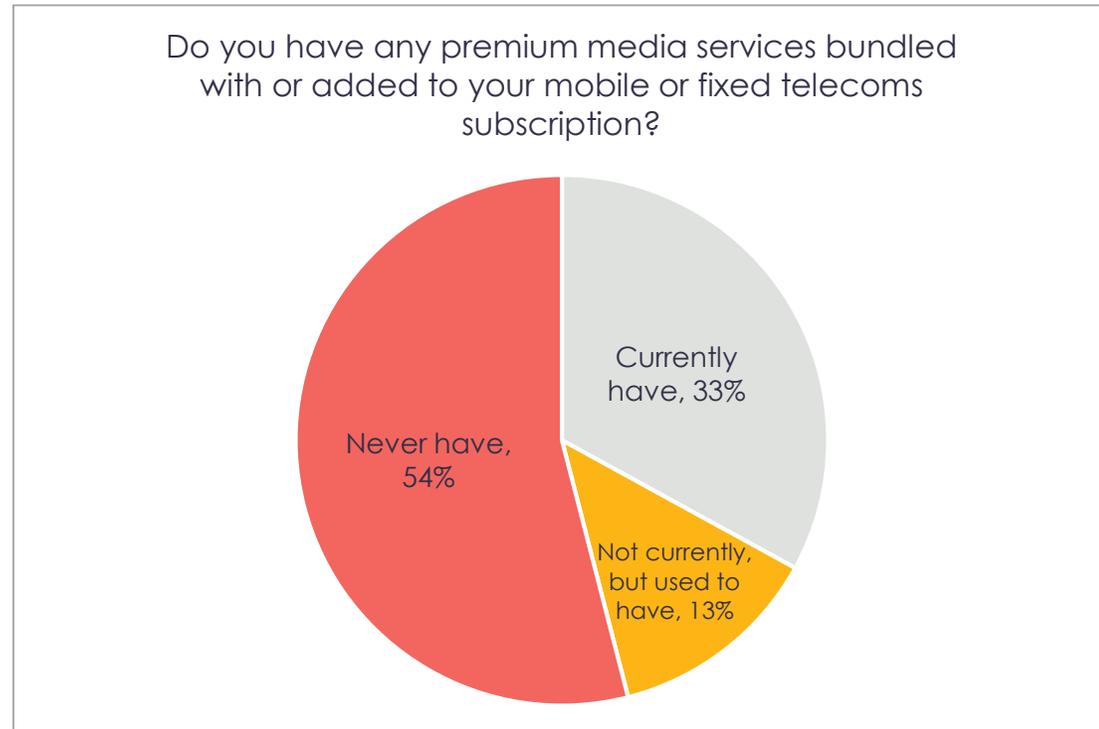
Their propensity to churn to pursue a compelling bundle offer elsewhere is relatively high however



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 262 total respondents in Singapore

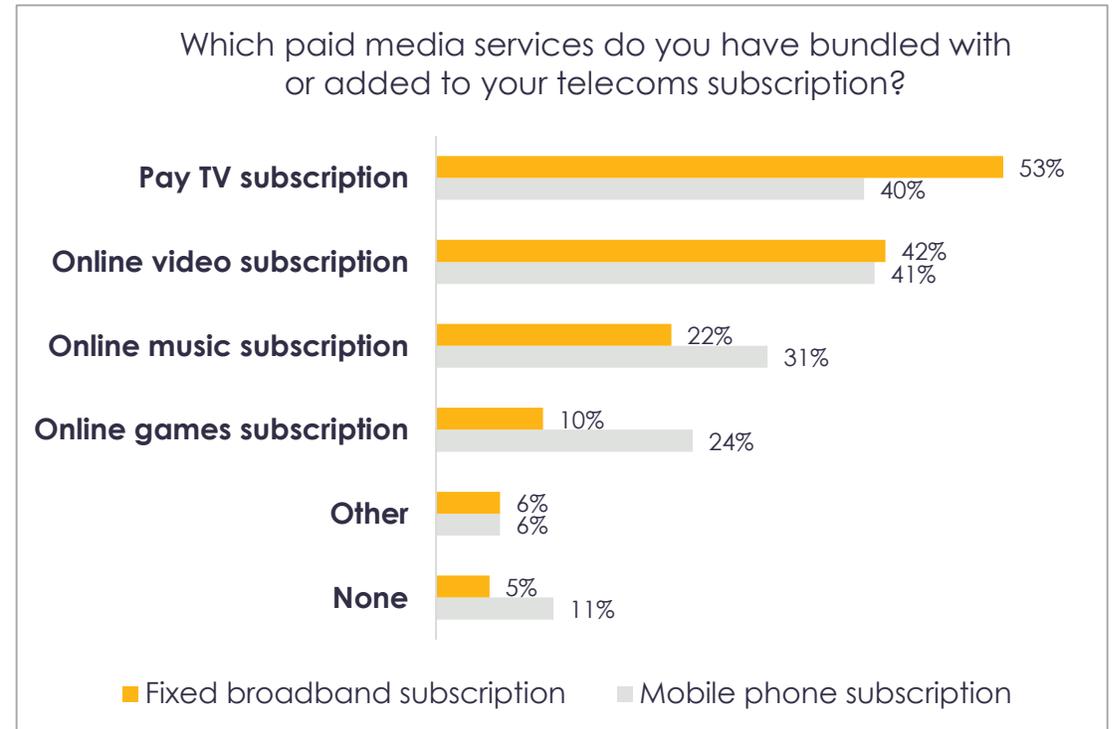
# Only one-third Singaporeans are subscribed to bundled OTT media

Like its developed-market counterpart, Australia, Singapore has relatively few bundlers



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 262 total respondents in Singapore

Also like Australia, pay-TV is what is most bundled, but online video has already caught up on mobile

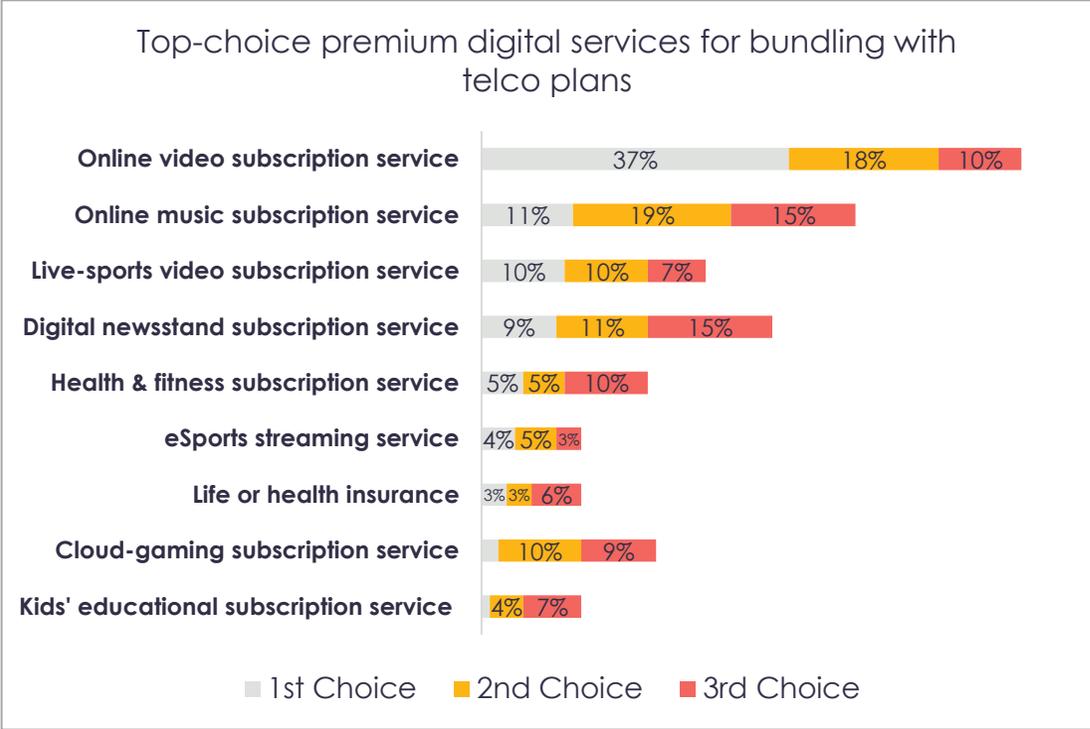
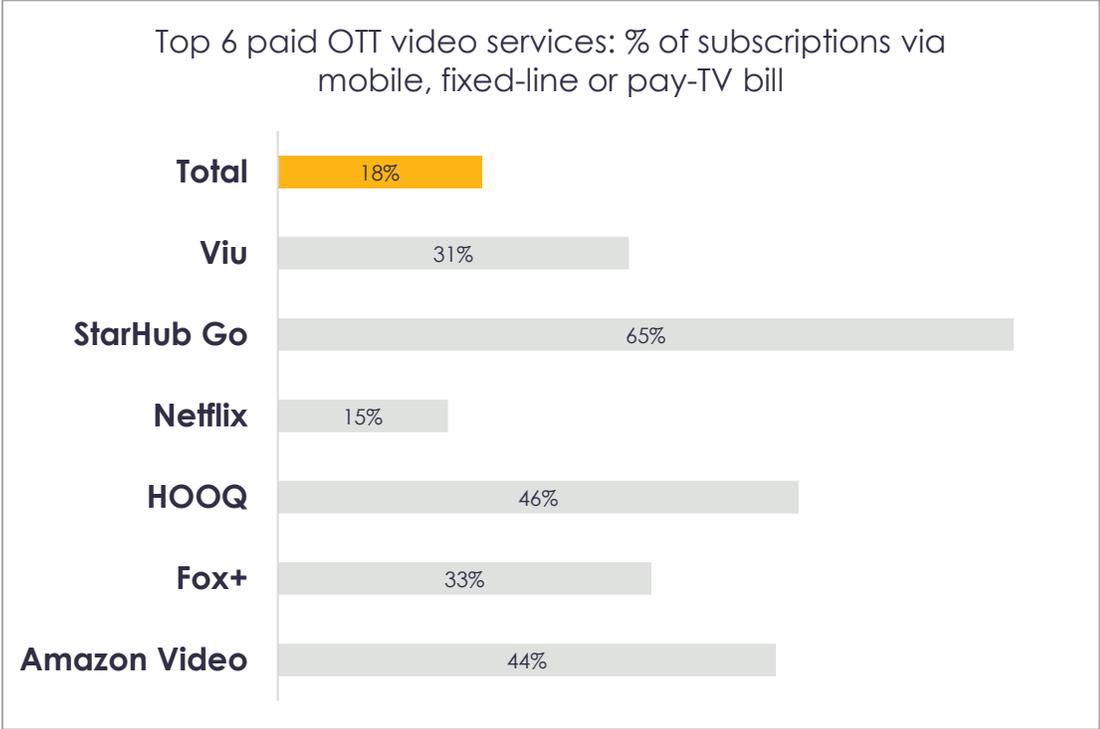


Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 262 total respondents in Singapore

# Singapore: Share of OTT video services on carrier bills, and top user choices for bundling

Amazon's hard bundling and DCB deal with Singtel gives it its high carrier-billed score in Singapore

Digital newsstand subscriptions rank highest in Singapore as a 1<sup>st</sup> choice for bundling



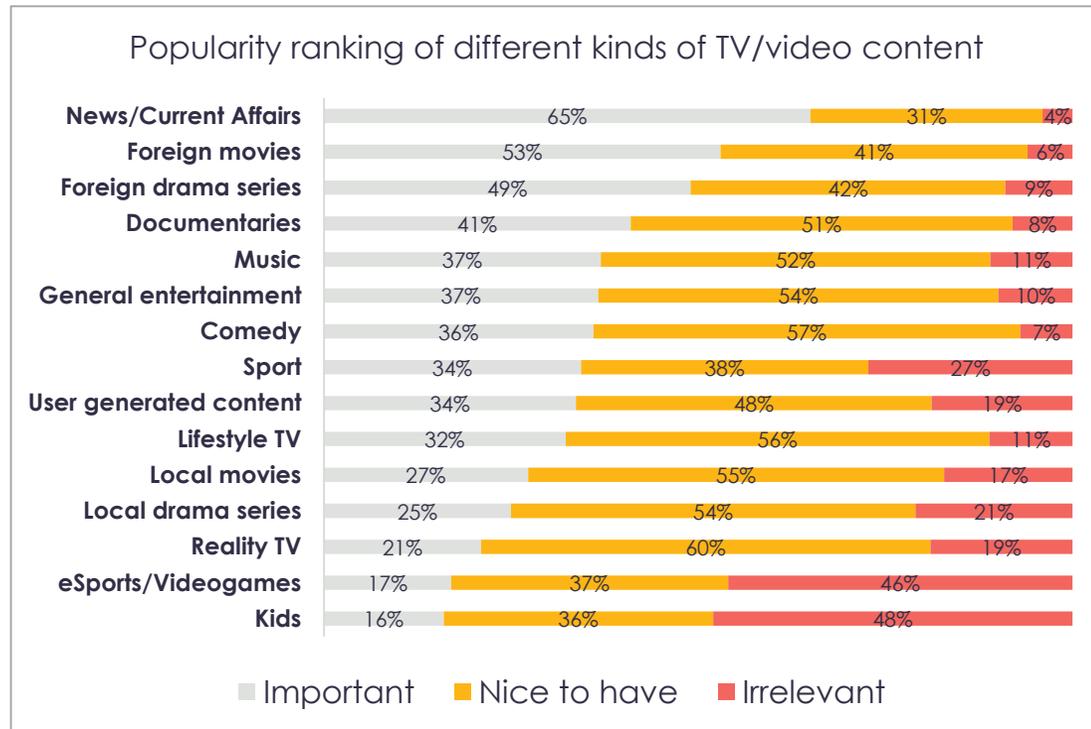
Source: Ovum  
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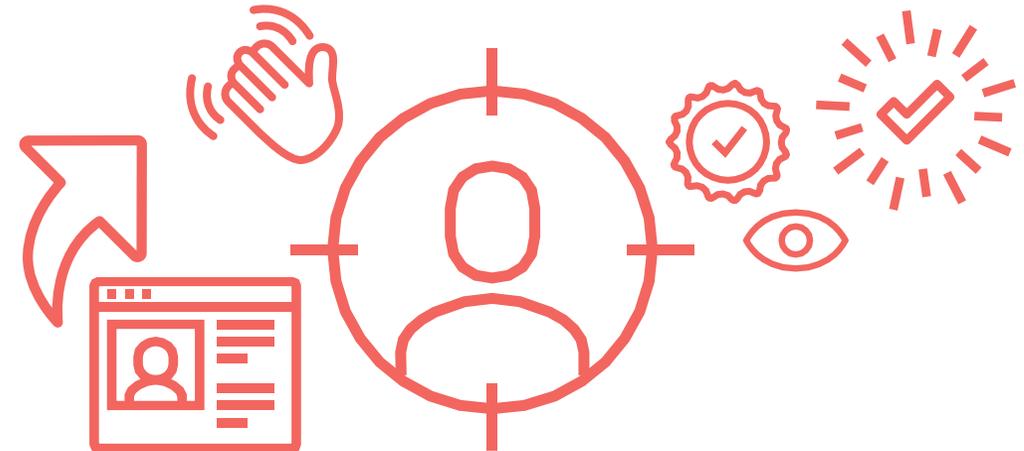


# Foreign content dominates the screens in Singapore

Foreign content scores very highly in Singaporeans' TV/video tastes



Source: Ovum  
 Source data: Amdocs' commissioned consumer survey. 262 total respondents in Singapore



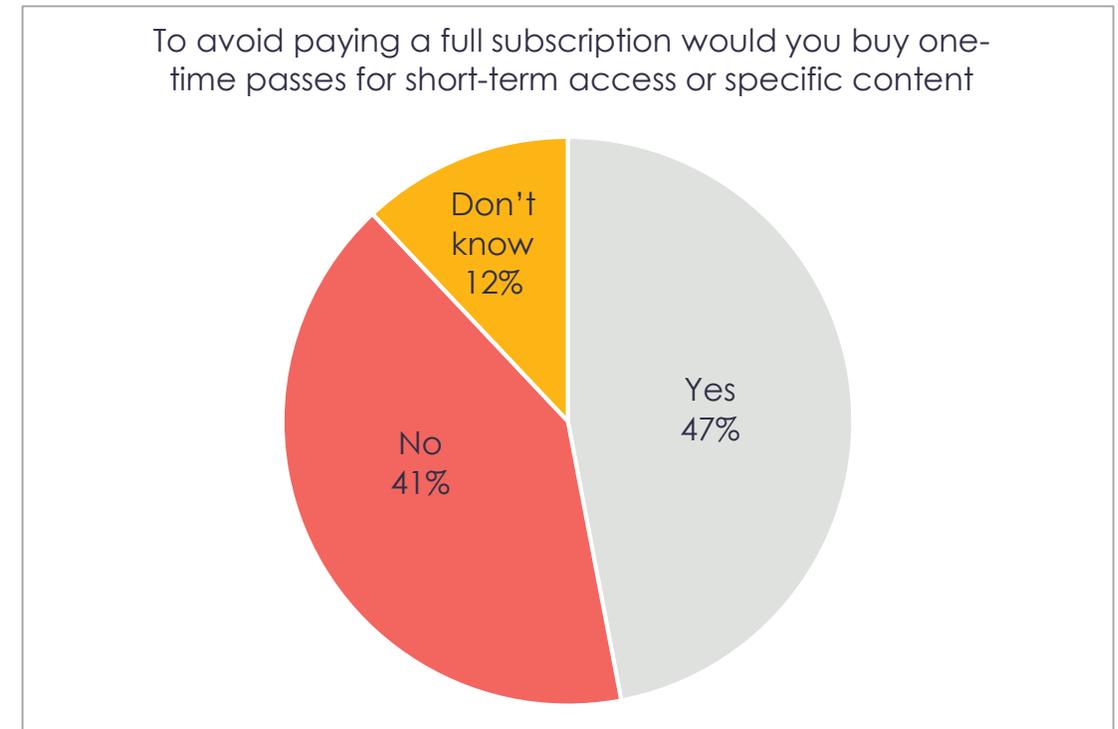
# OTT media is still expensive for most Singaporeans: Pay-per-use model looks promising

With the average online video subscription costing S\$12.47, 63% of consumers are outside its range



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 262 total respondents in Singapore

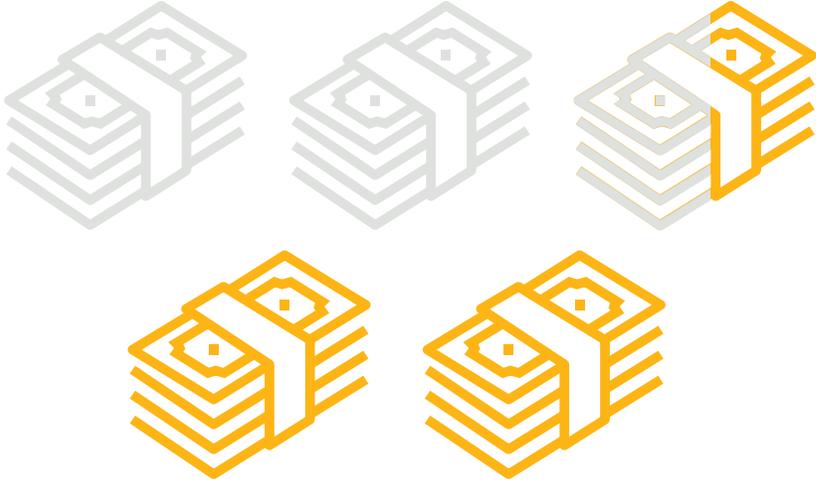
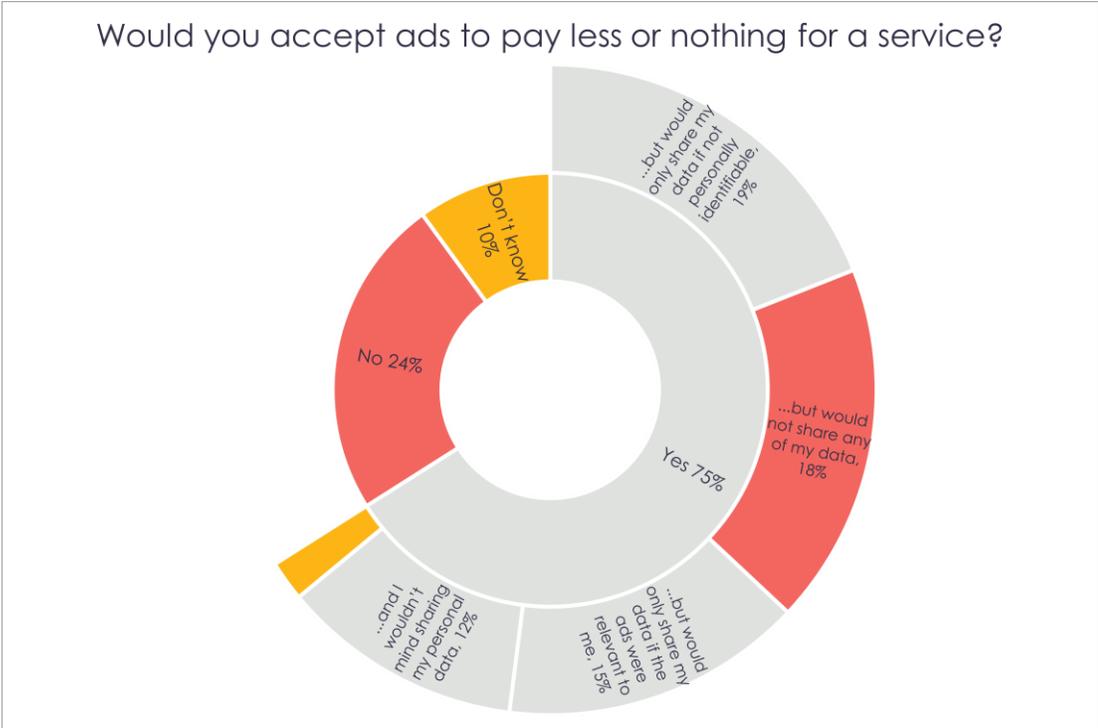
Nearly 50% of Singaporean online users would be open to paying for one-time passes



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 262 total respondents in Singapore

# Singaporeans won't mind getting targeted ads or sharing personal data in return for reduced OTT cost

Singapore has highest % of non-data sharers, among the 5 countries surveyed

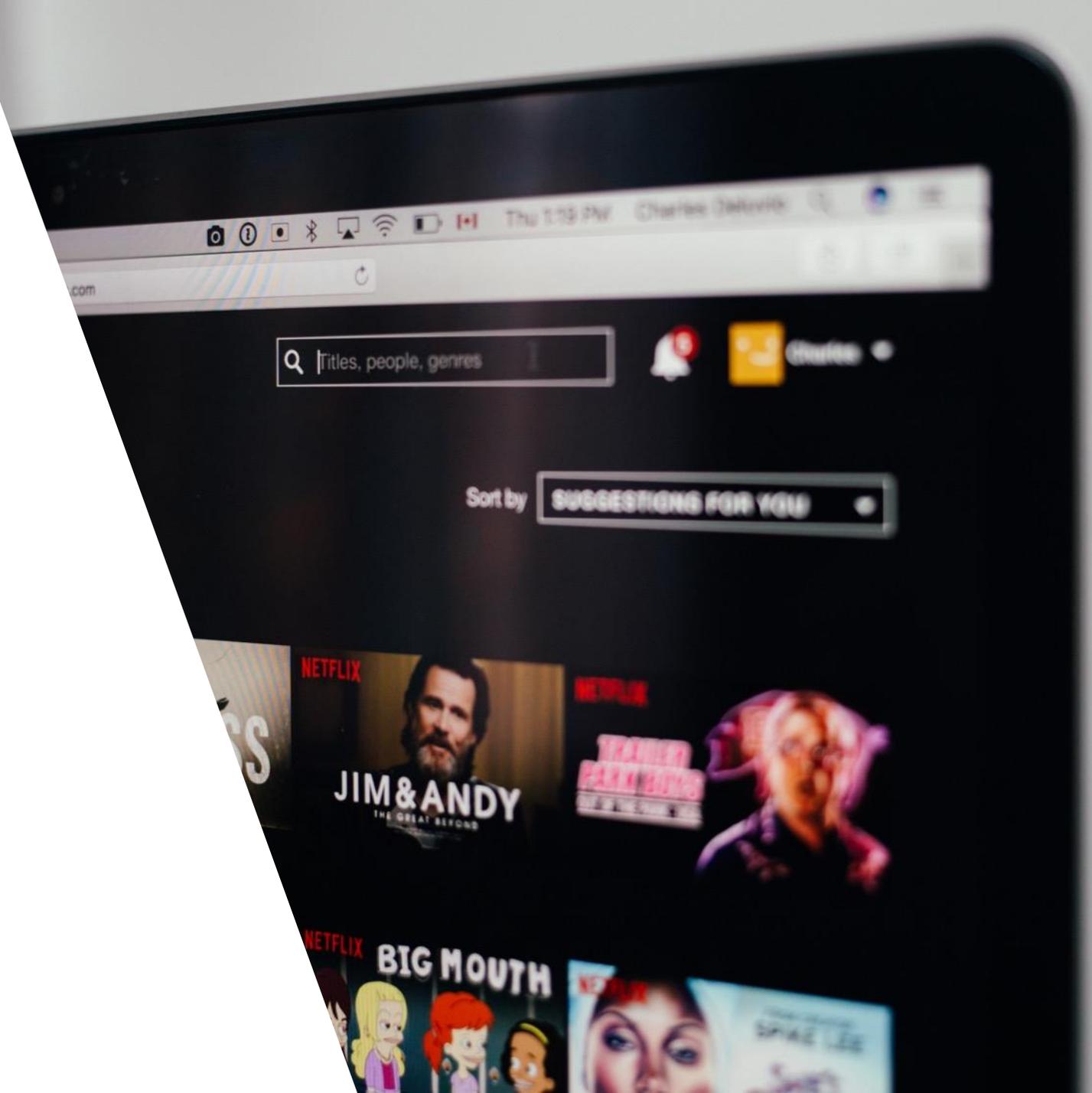


Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 262 total respondents in Singapore



# Australia

Country view



# Paid OTT video services are growing in Australia, but more push is needed

The survey results give Australia the lowest proportion of consumers who are either subscribed to paid online video services or have media services bundled with their carrier subscription plans.

Pay TV services account for the biggest share of carrier-bundled media subscriptions. The share of paid online video services is nevertheless catching up on the mobile front.

Like India, it is a market in which local content and services matter. Netflix may be the dominant SVOD player, but in second and third place are local brands Foxtel Now and Stan – the former being an OTT spinoff of cable and pay-TV operator Foxtel.

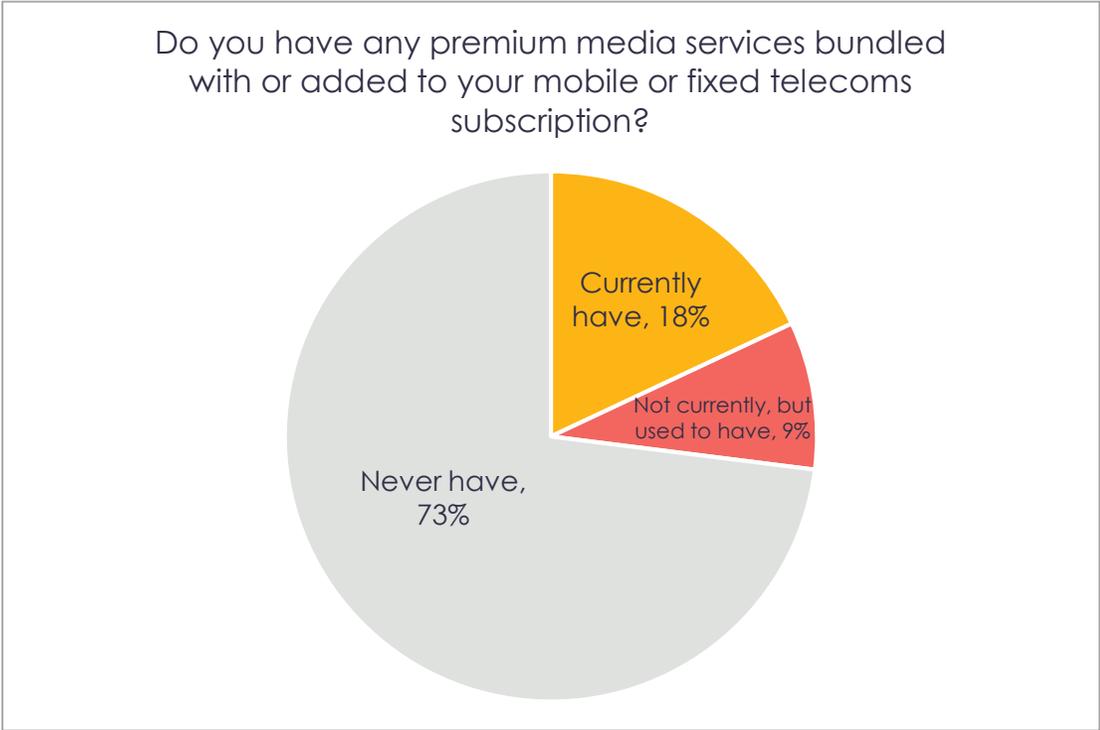
Most of the market's bundling activity revolves around pay TV, with the likes of Foxtel Now, Netflix and Stan integrated into carrier STBs – in some cases, with billing integration.

A higher proportion of respondents than elsewhere put down unaffordability as a reason for not subscribing to online video services, yet Australia indexed the lowest in the survey in terms of consumer openness to advertising or other alternatives to paying full subscriptions.

Australian respondents also reported the weakest effects from bundling – in terms of both their likelihood of remaining loyal to a carrier offering them attractive bundle offers or churning to another carrier making even more attractive offers.

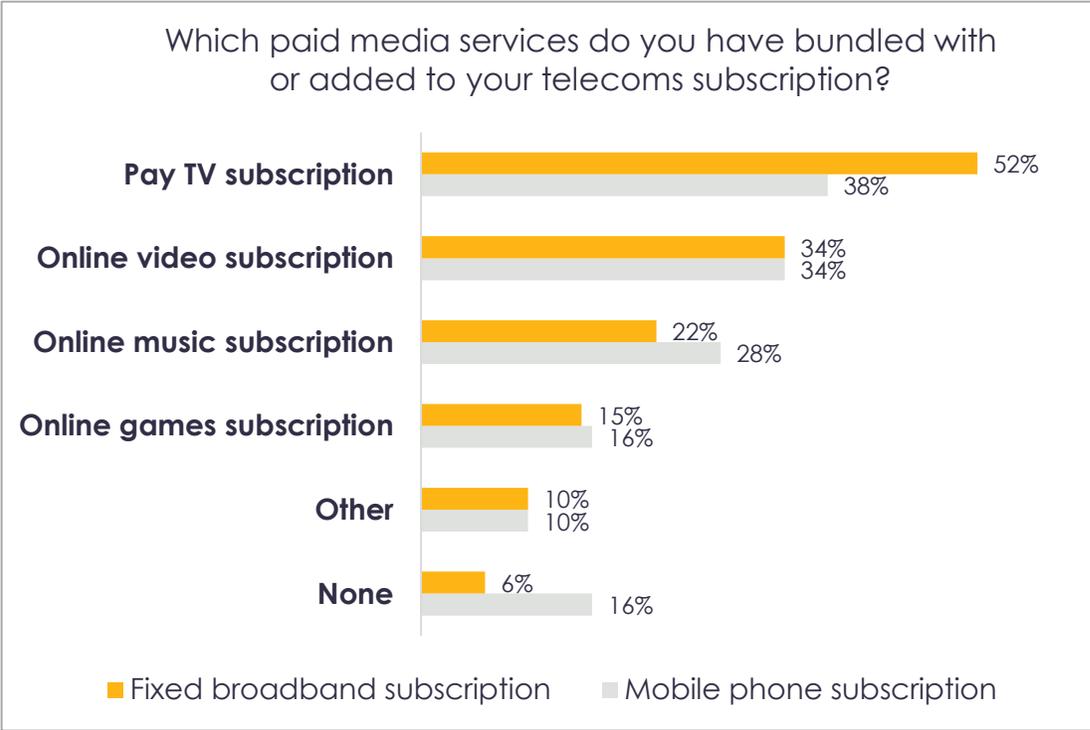
# Australia: share of subscribers with bundled services, and the services they are bundling

Australia has lowest incidence of bundling out of all markets surveyed



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia

Pay TV is most frequently-bundled subscription, but on the mobile front, online video subscriptions are catching up

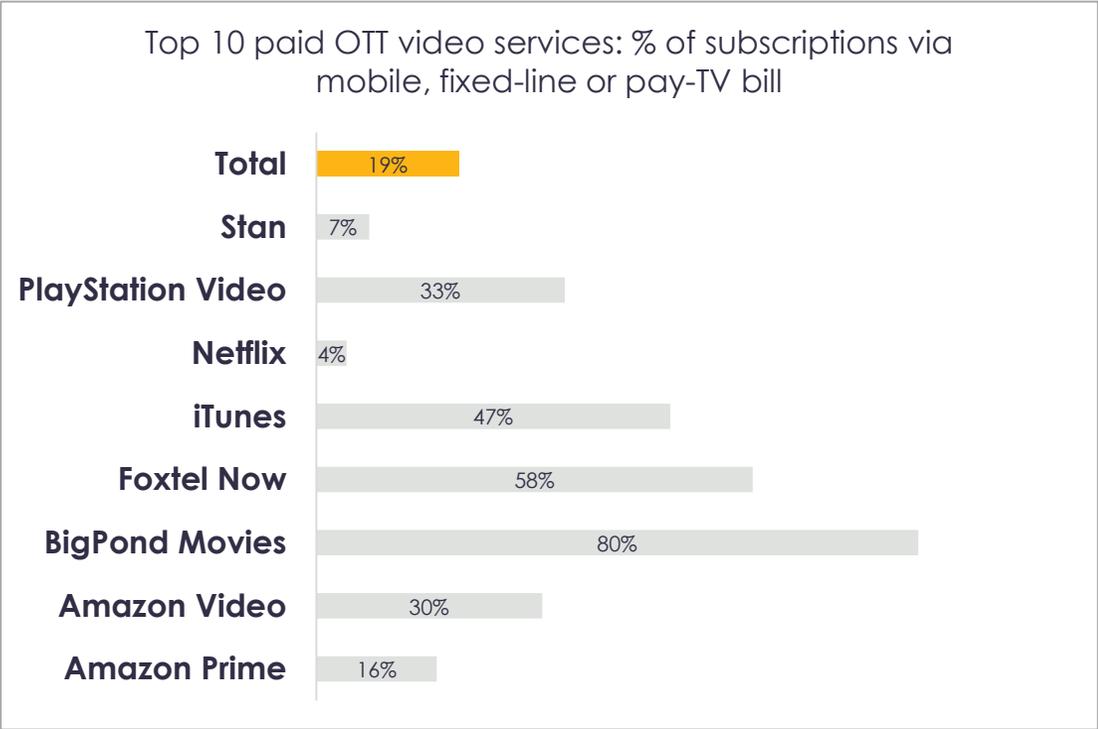


Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia



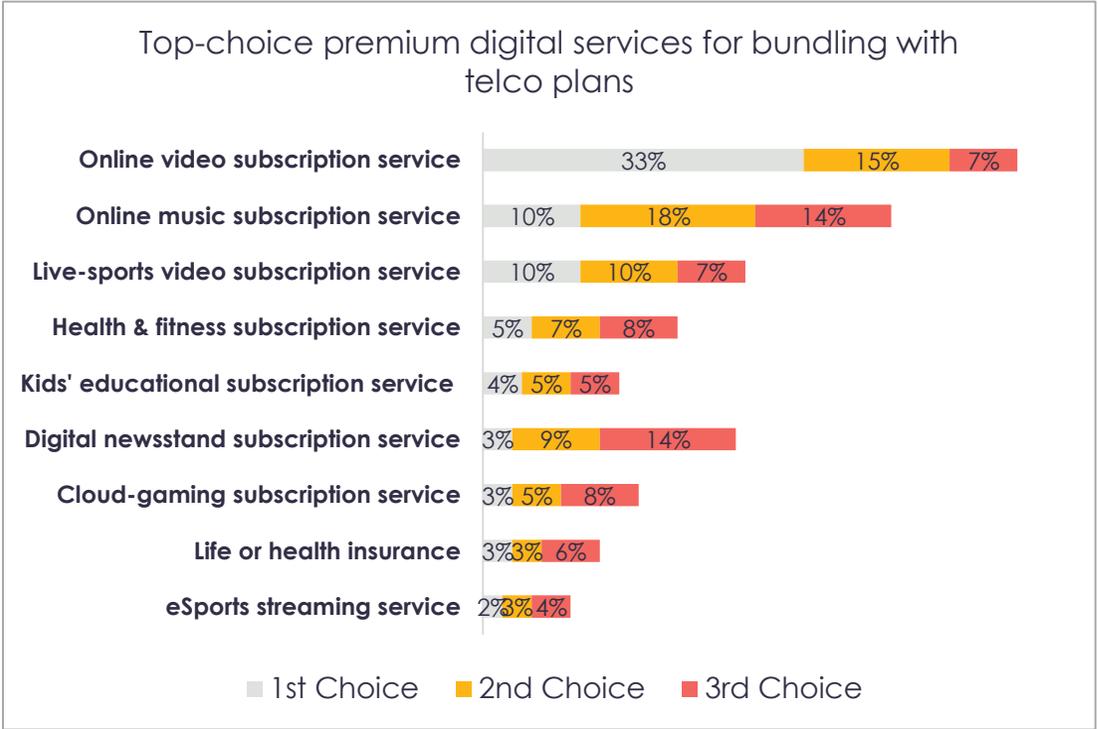
# Australia: share of OTT video services on carrier bills and top user choices for bundling

Netflix, the biggest video OTT, is rarely carrier-billed. Telco-owned OTTs top the chart



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia

Health & fitness apps rank highest as first choice for bundling

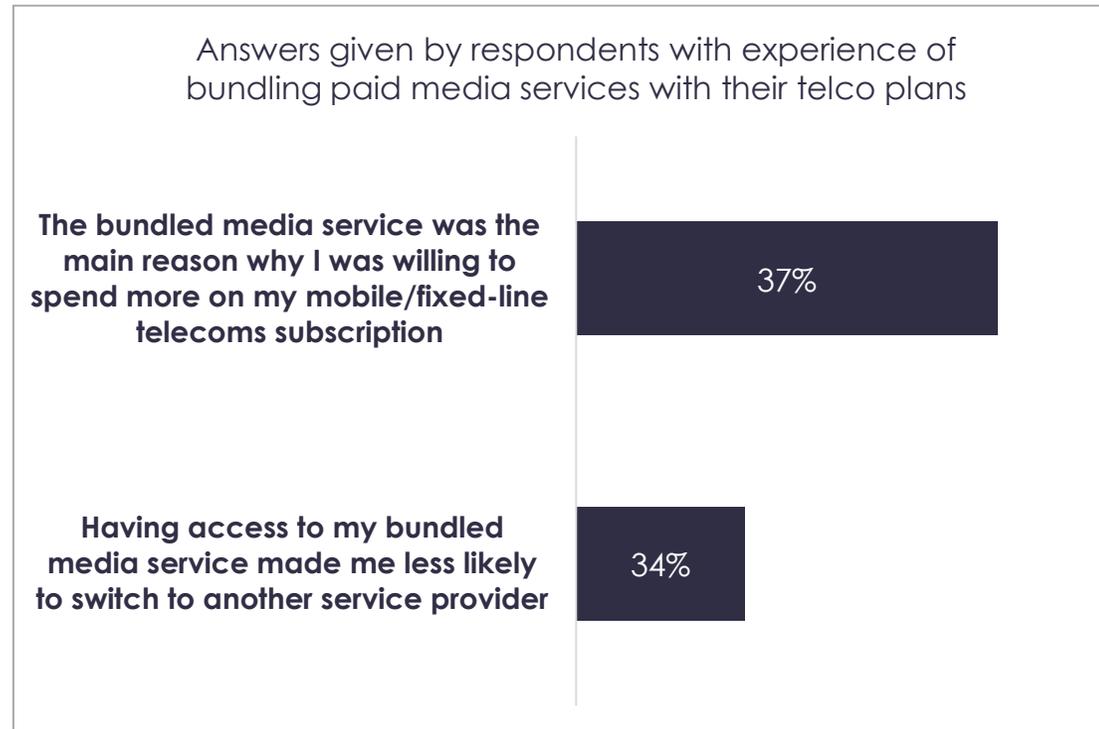


Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia



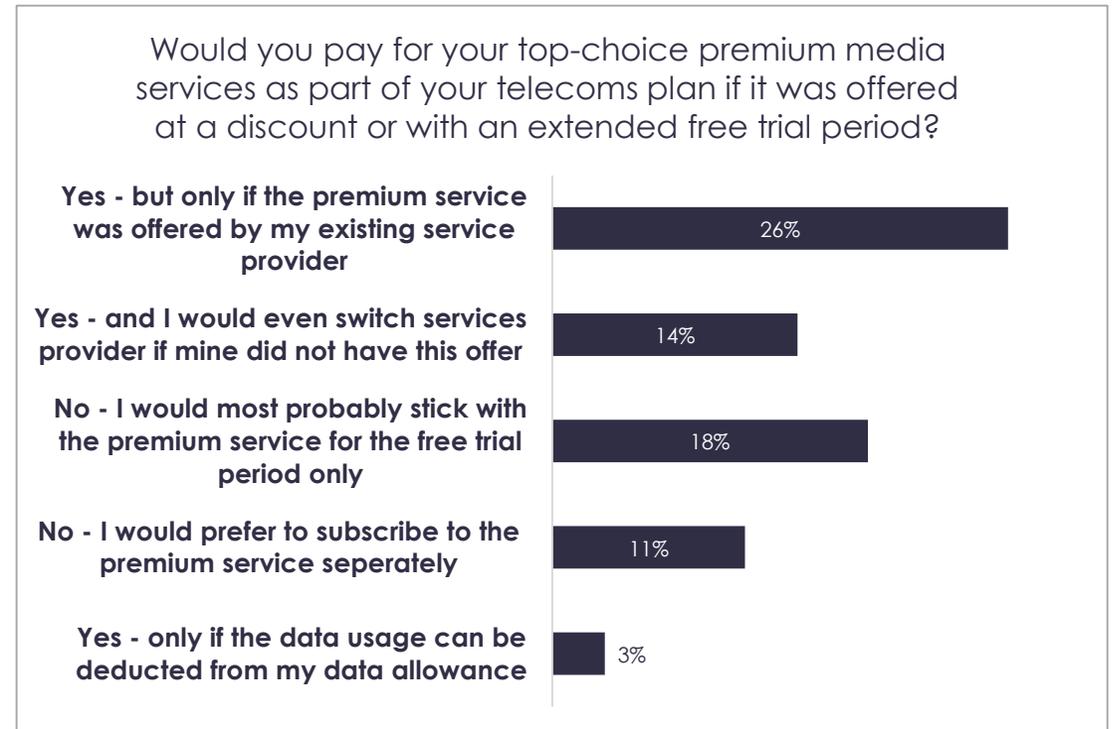
# Bundled OTT media is responsible for significant number of Australians spending more on mobile or broadband subscriptions

Comparatively, Australians report weakest retention effects from bundling



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia

And they are also least likely to churn in pursuit of a compelling bundle offer elsewhere

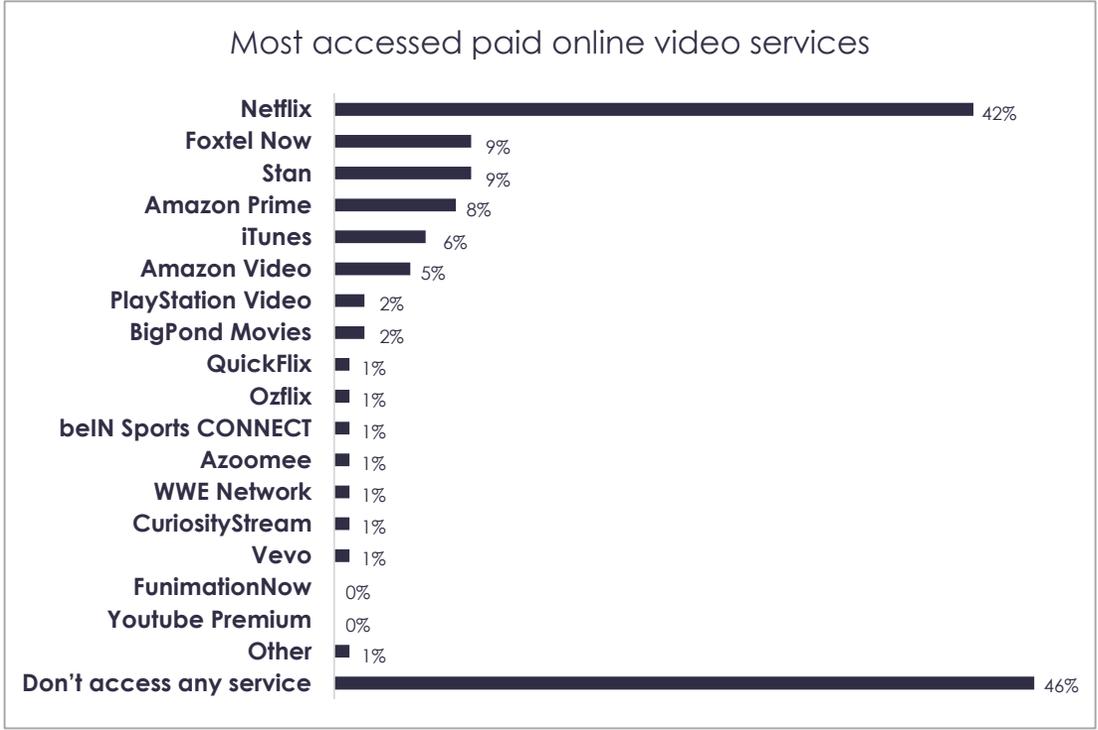


Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia

# Australia: share of consumers accessing paid online video and the brands they access most

Lowest consumption of paid online video of the 5 markets; multi-subscription ownership is low too

Netflix dominates market, with carrier OTT offerings like Foxtel Now among the top services



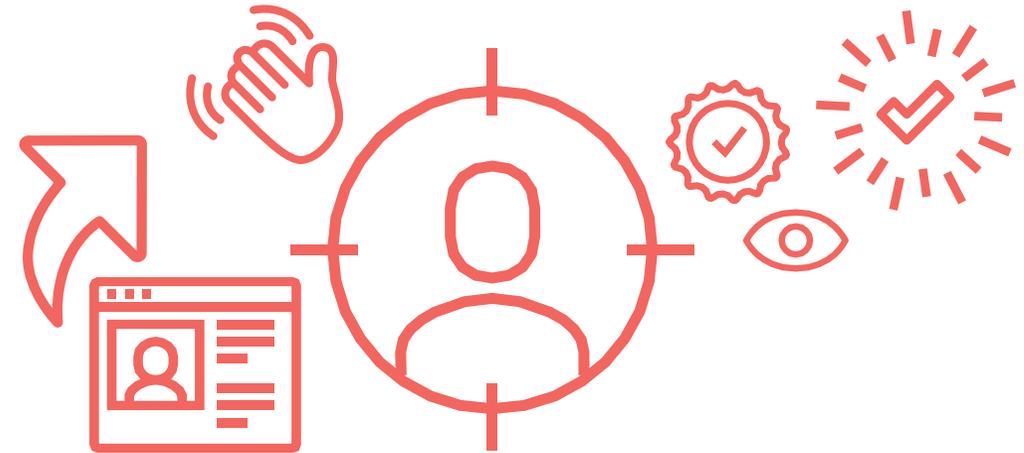
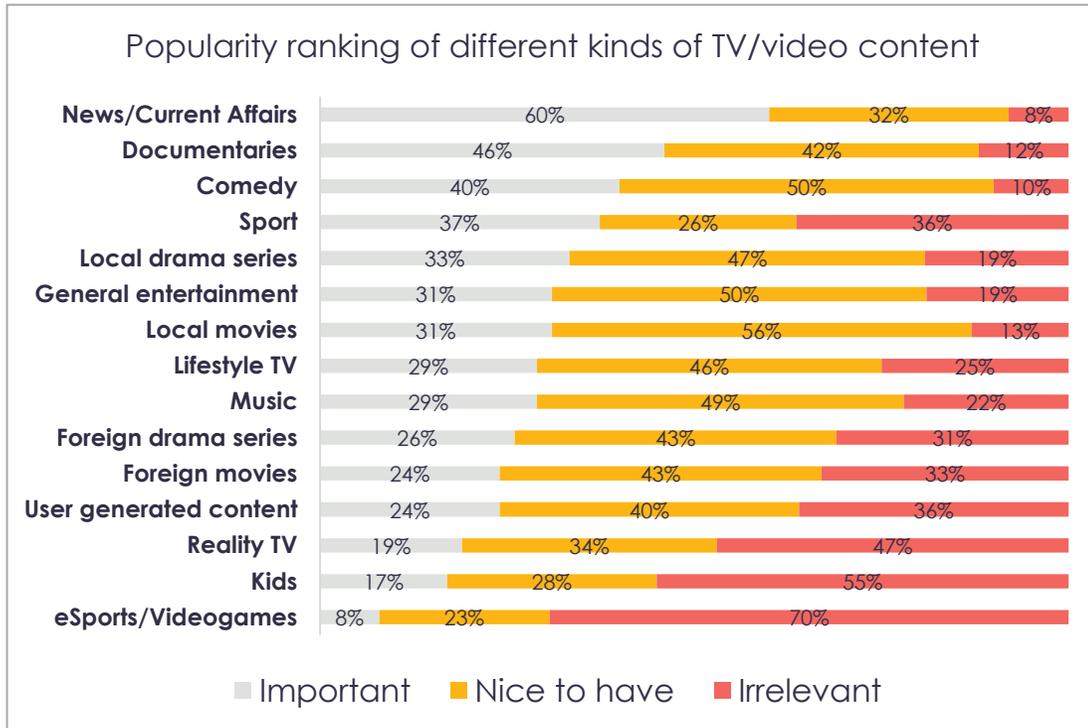
Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia

Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia



# Australians want local content

Australians value local dramas and movies more than equivalent foreign content



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia

# Australia: reasons for multi-video subscriptions ... or no subscriptions at all

Individualist needs trump household needs to explain multi-subscription usage



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia

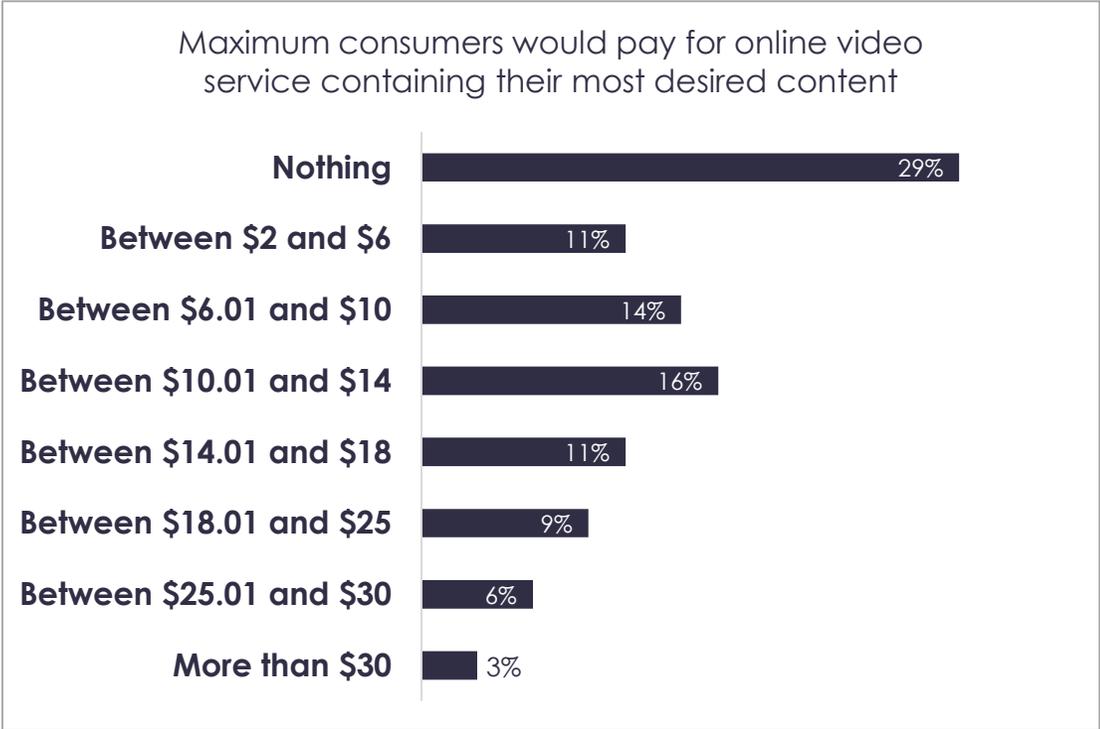
Australia had largest share of respondents blaming unaffordability for not buying paid OTT video



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia

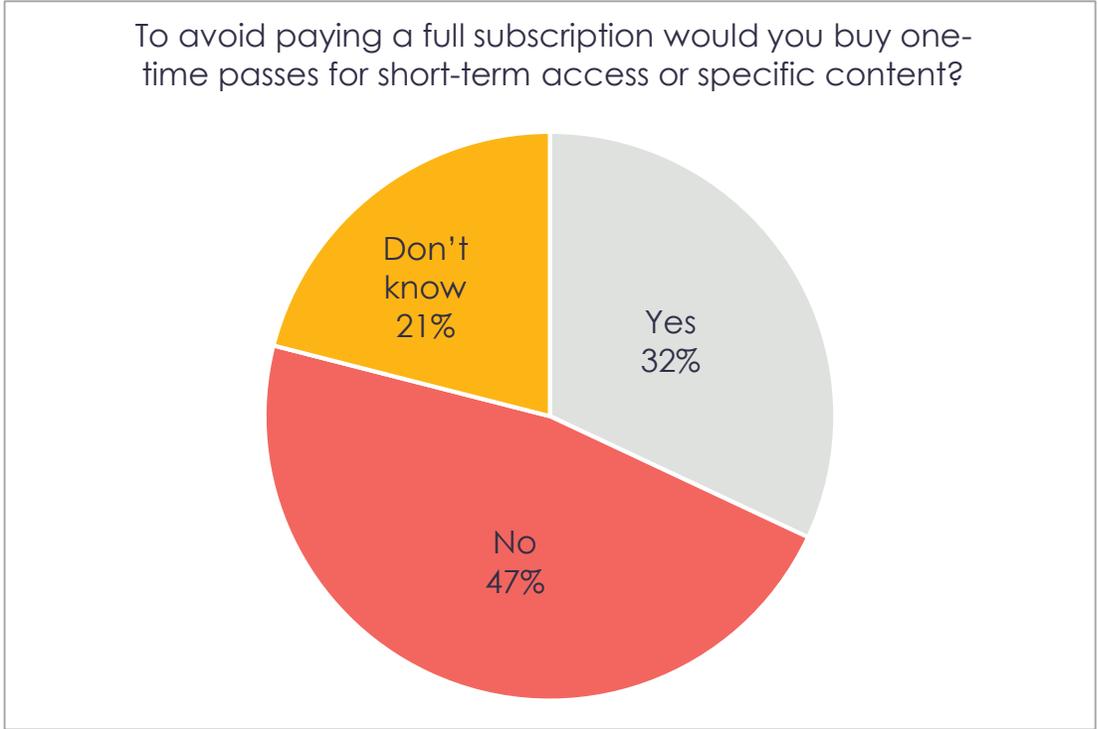
# OTT media is expensive for most Australians: pay-per-use model could be an alternative

With average online video subscription costing A\$11.84, this is too much for 54% of consumers



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia

Australians are not much interested in one-time passes, yet it could be an alternative to full subscriptions

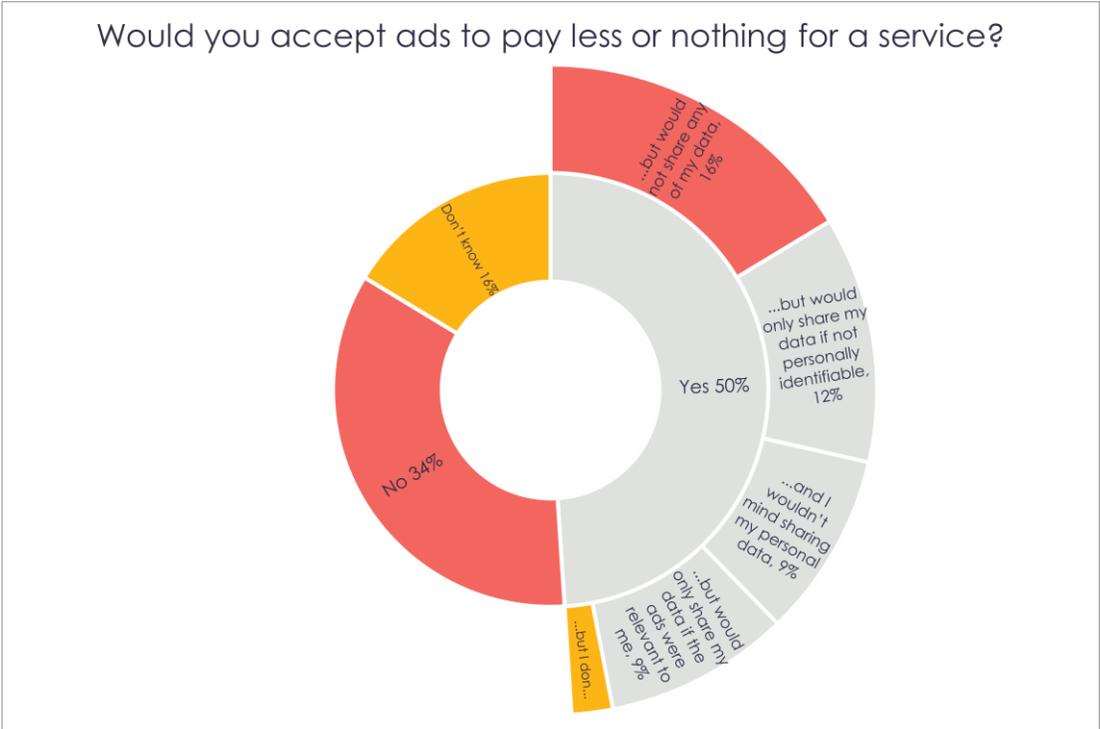


Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia



# Australians don't mind ads but are not likely to share personal data in return for a reduced OTT subscription

Only 30% are open to both ads and sharing data

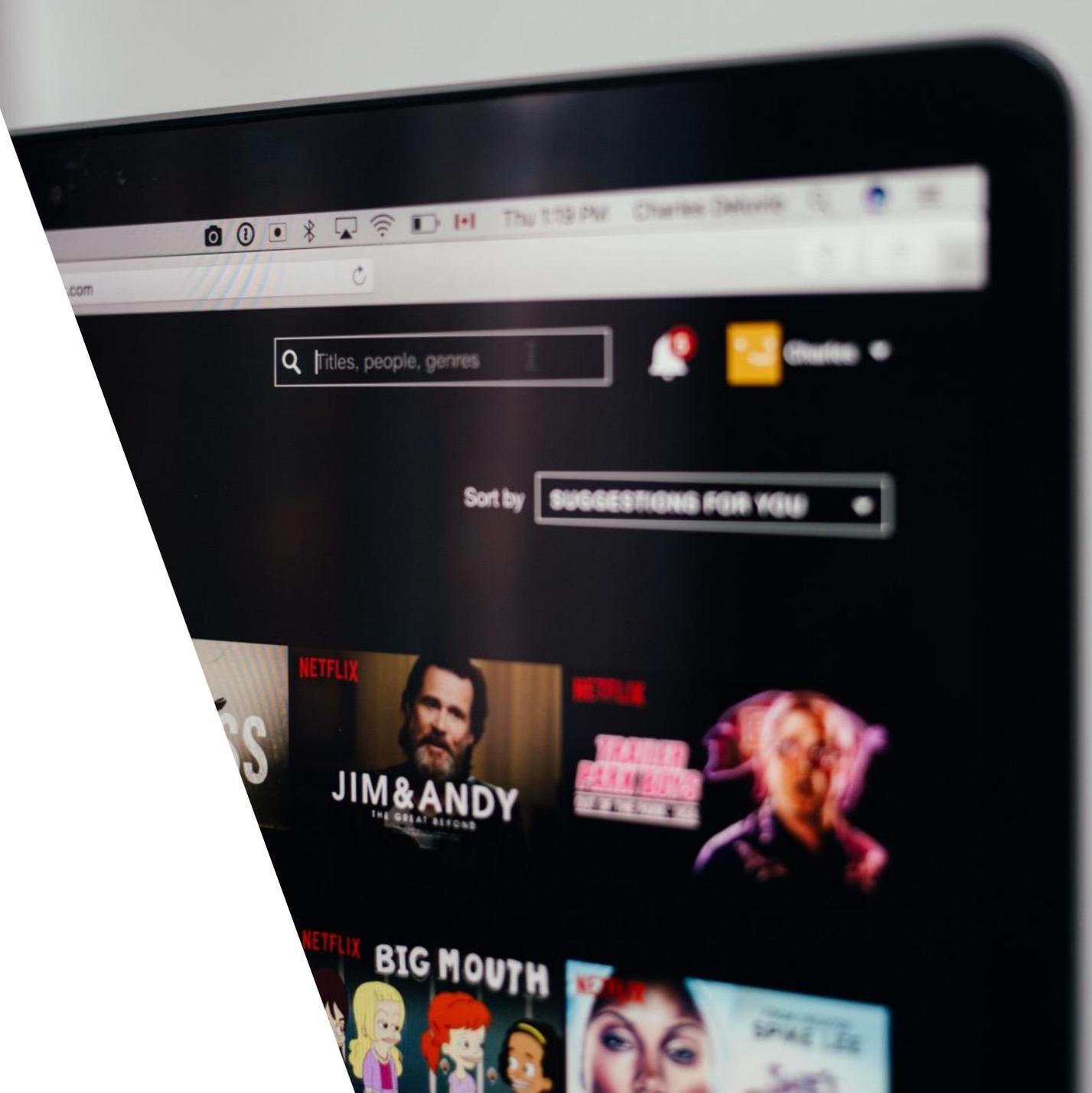


Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 525 total respondents in Australia



# Thailand

Country view



# Thailand offers multiple opportunities to grow OTT media subscriptions

Thailand's survey results were very bullish on the telco-OTT partnerships. The country obtained the biggest share of: respondents with carrier-bundled paid media services; online video subscriptions bundled with either mobile or fixed broadband plans; online video subscriptions on carrier and pay-TV bills; and, jointly with India, respondents reporting positive retention effects from bundling.

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Yet, Thailand's telco-OTT video partnerships scene is currently the quietest out of all five markets. Or at least in terms of what is evident from publicly available information.

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Only one carrier, AIS, has live partnerships at the moment – a mixture of hard/soft bundles and bolt-ons with the likes of Hooq, Iflix and Viu. It also has a carrier billing arrangement with Netflix. Thailand's other big carrier, DTAC, which used to have a partnership with Iflix, doesn't appear to be active in this space at the moment.

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The pricing of paid online video services in Thailand would appear to be the most competitive out of the five markets, with the lowest share of respondents with budgets below the average price for a standard subscription. Yet, Thai respondents were also the most positive about accepting advertising, with 69% saying yes to both ads and sharing data.

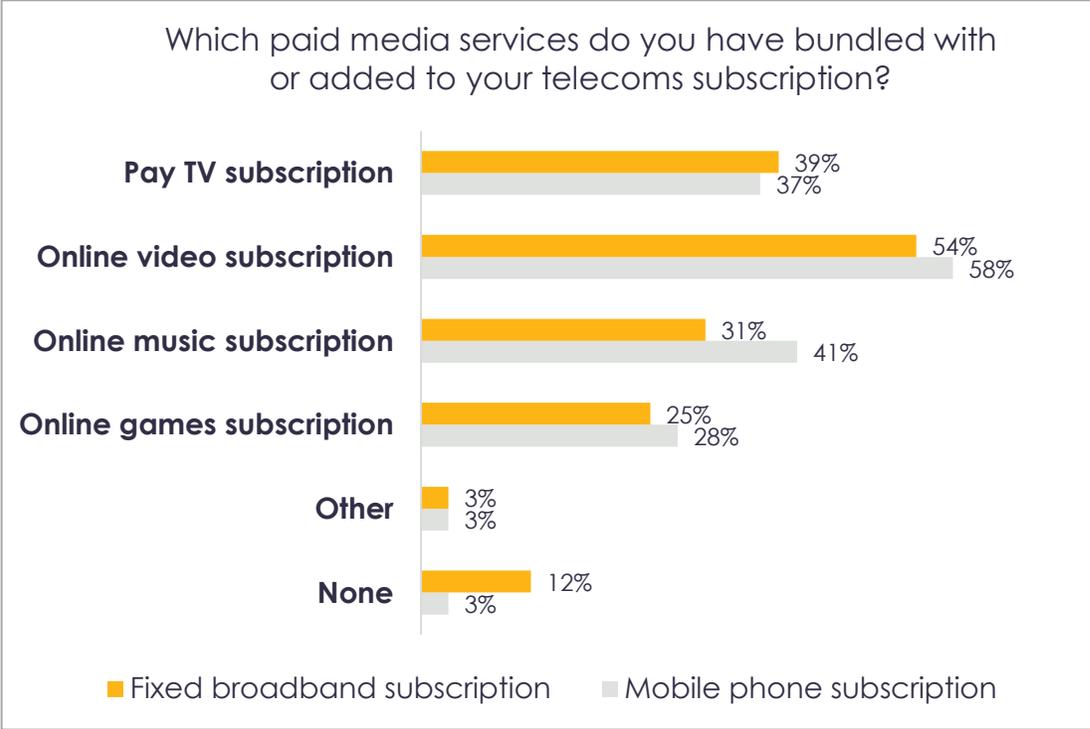
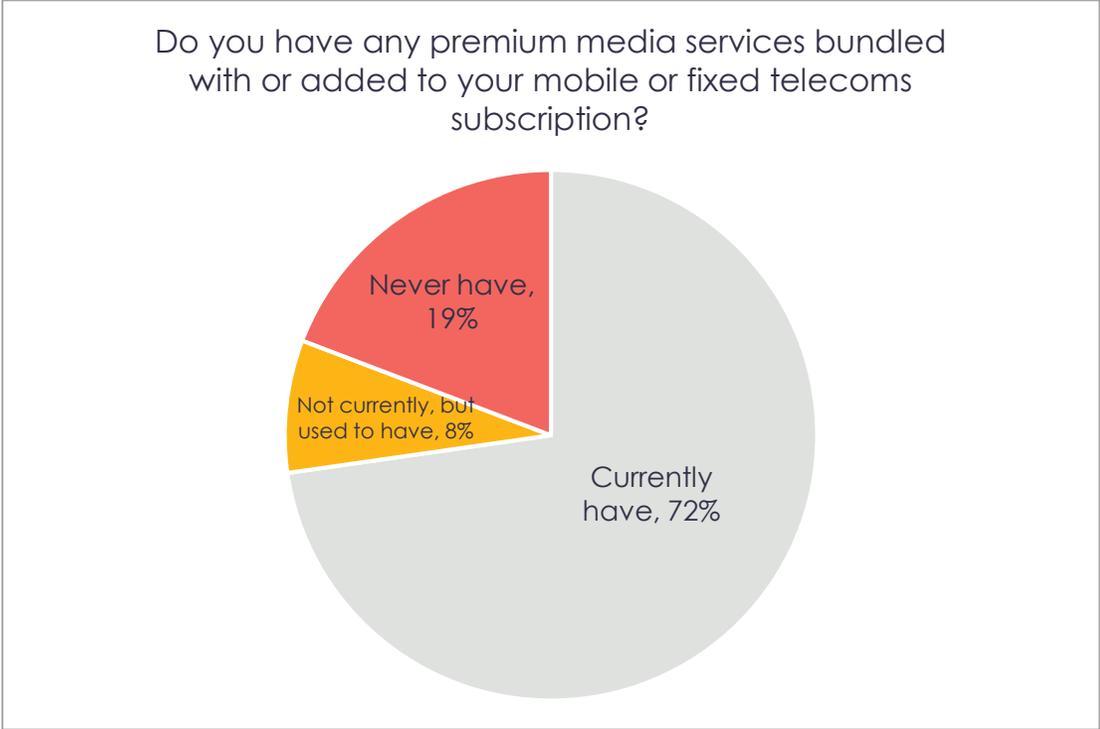
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Thai respondents also showed a relatively strong interest in bundling live-sport streaming services and life/health insurance covers with their carrier subscriptions.

# Thailand: Share of people with bundled services, and the services they are bundling

Despite not much evident bundling activity, Thailand reported the highest share of bundlers

Again, befitting its emerging-market status, online video subscriptions are what is most bundled



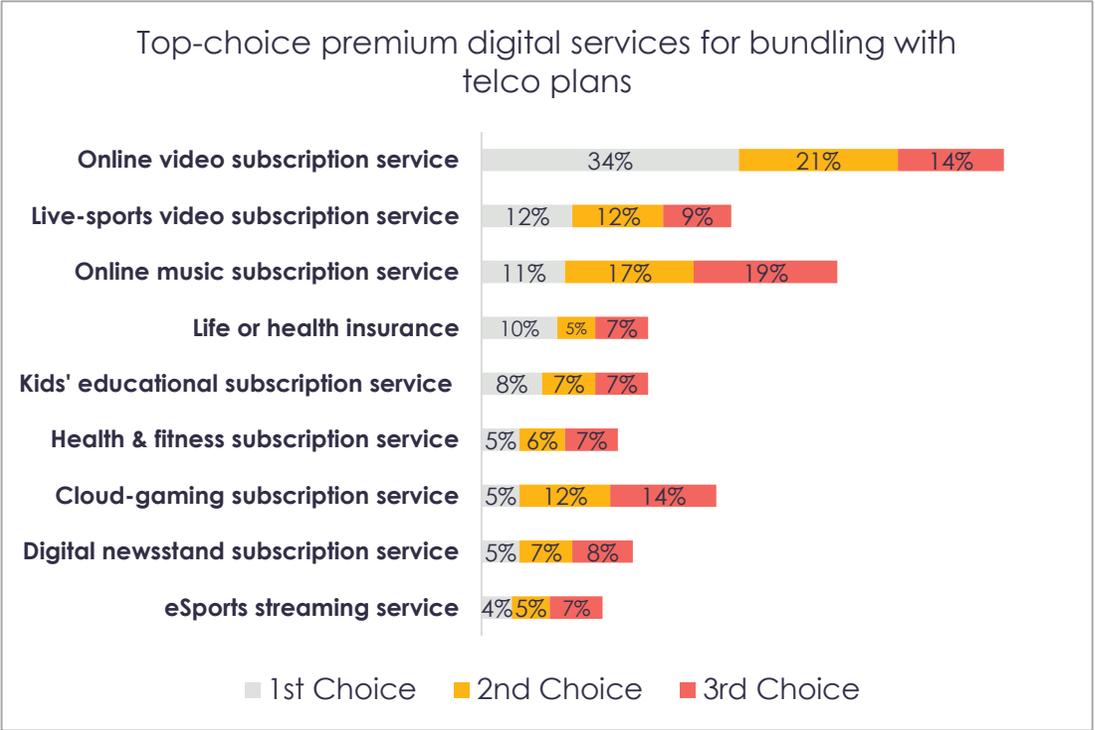
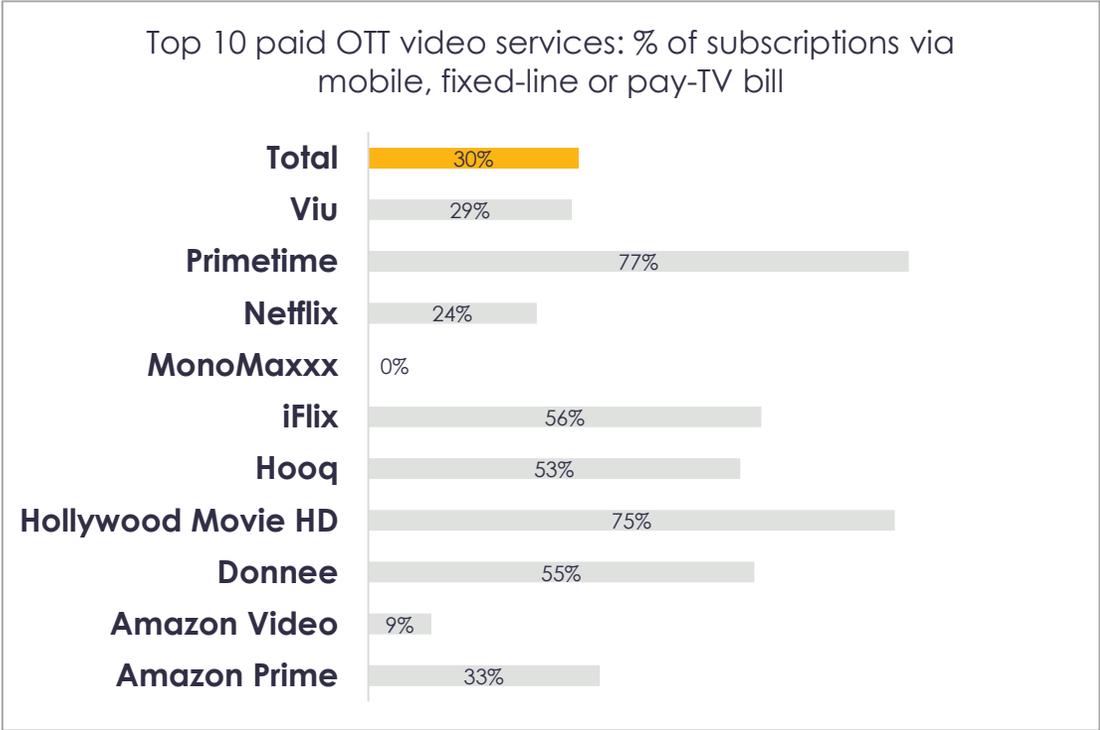
Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 264 total respondents in Thailand

Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 264 total respondents in Thailand

# Thailand: Share of OTT video services on carrier bills, and top user choices for bundling

DCB, plus carrier aggregation services, might explain Thailand's high carrier-billed scores

Thais show the strongest demand for bundling life and health insurance plans

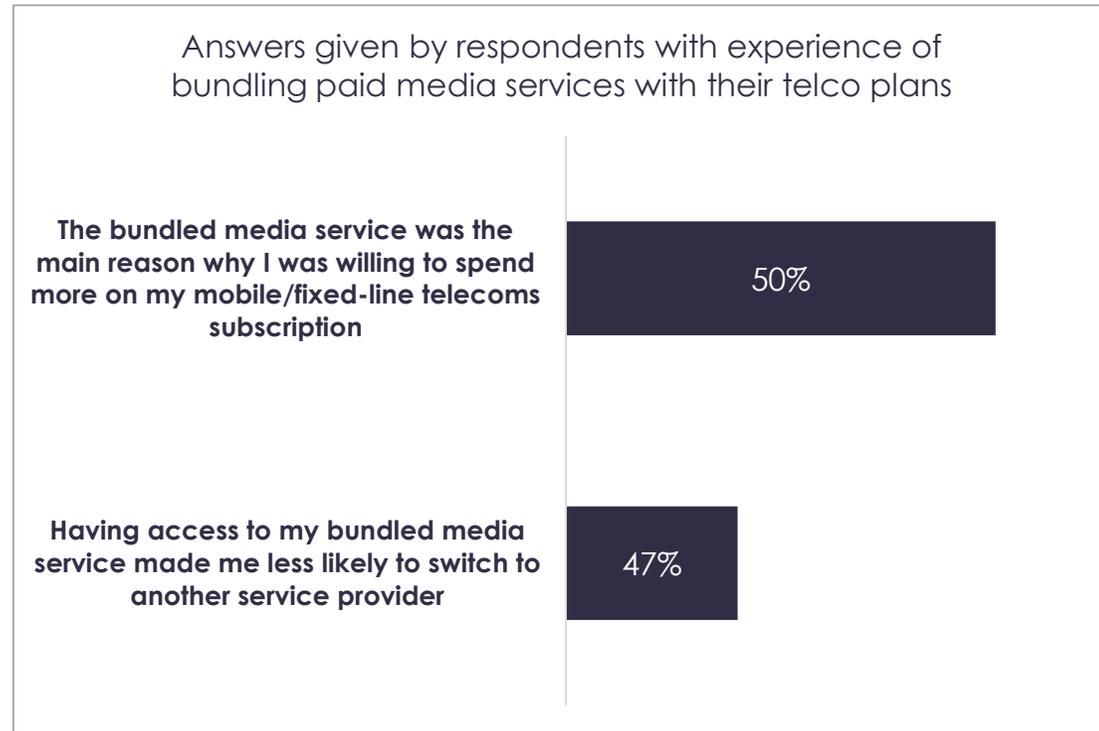


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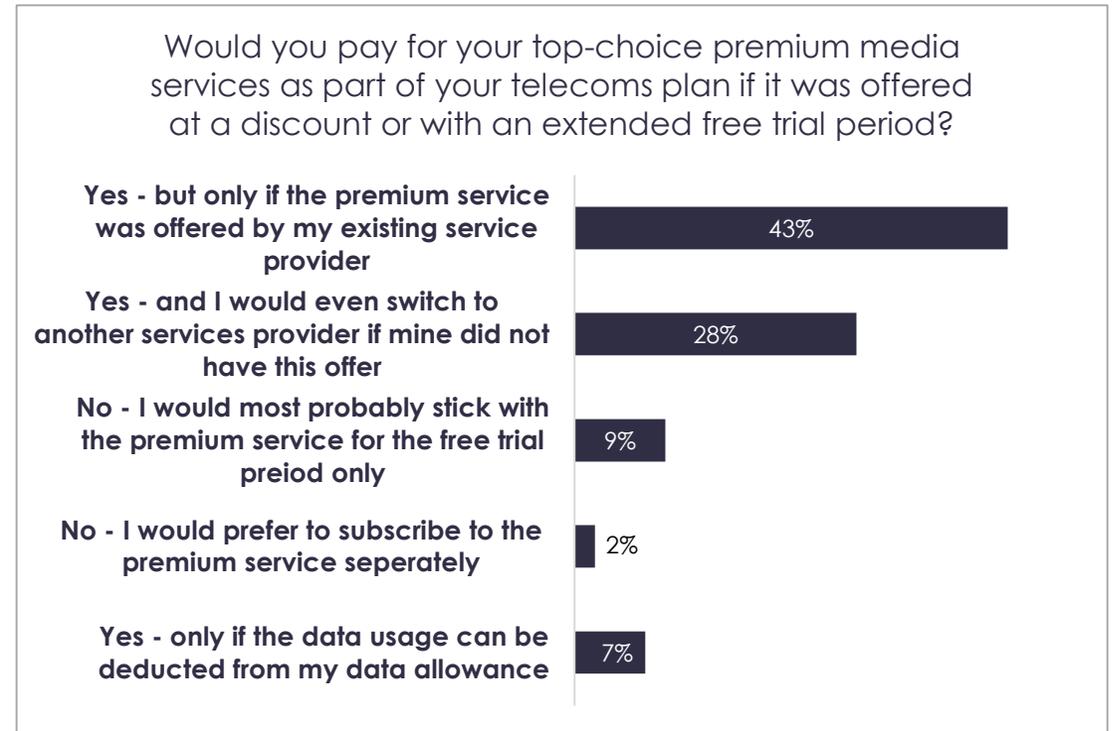
# Bundled OTT media makes Thais spend more on mobile or fixed broadband subscriptions

Thais report the strongest effects from bundling, both in terms of carrier loyalty and tariff spending



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 264 total respondents in Thailand

Their likelihood to churn from another carrier for an attractive bundle offer is also high

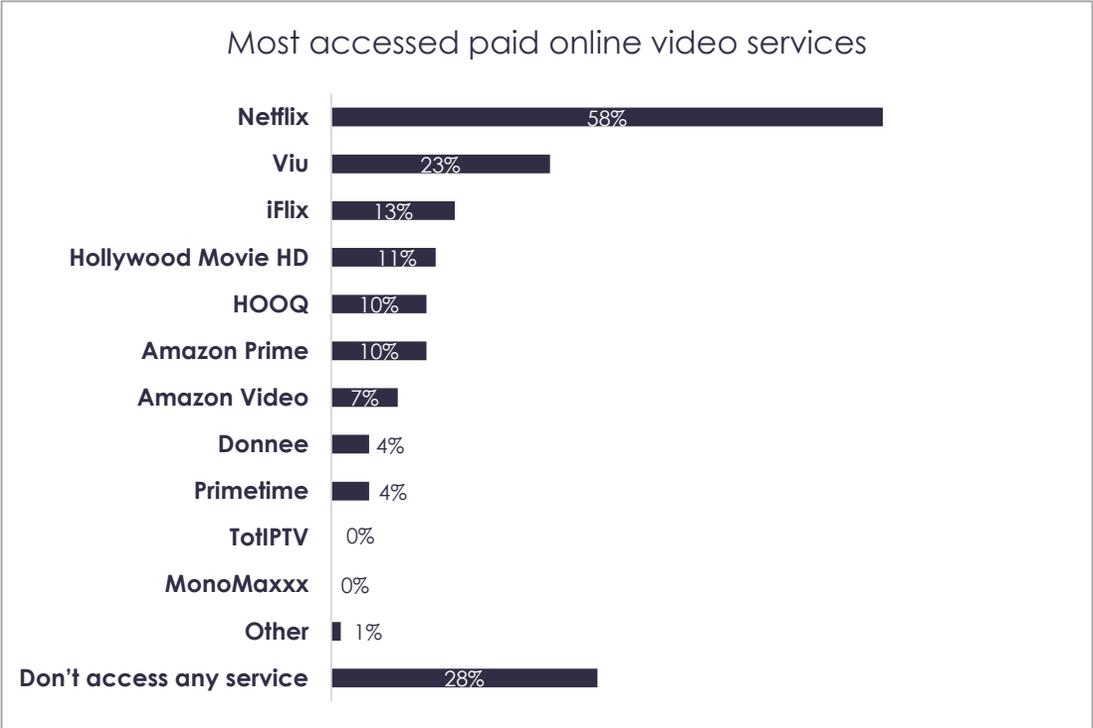
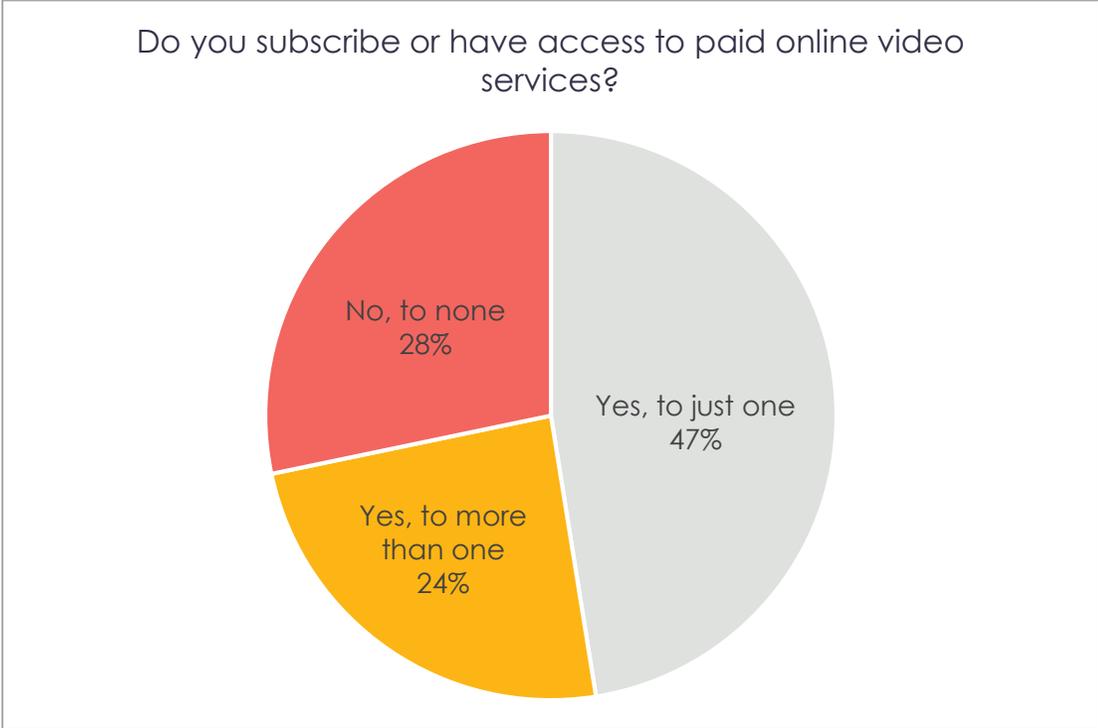


Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 264 total respondents in Thailand

# Thailand: Share of users accessing paid online video and the brands they most access

A relatively large share of Thai paid online video users pay for or access more than one service

Only one local brand, Hollywood Movie, features among the top-five most accessed services



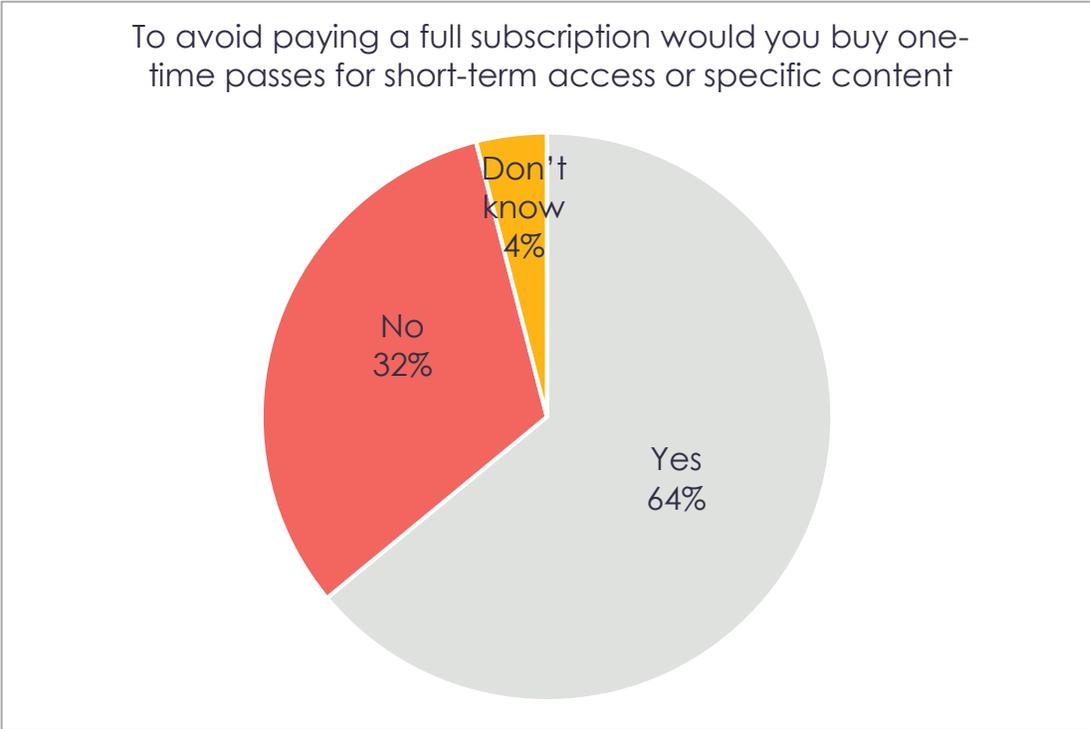
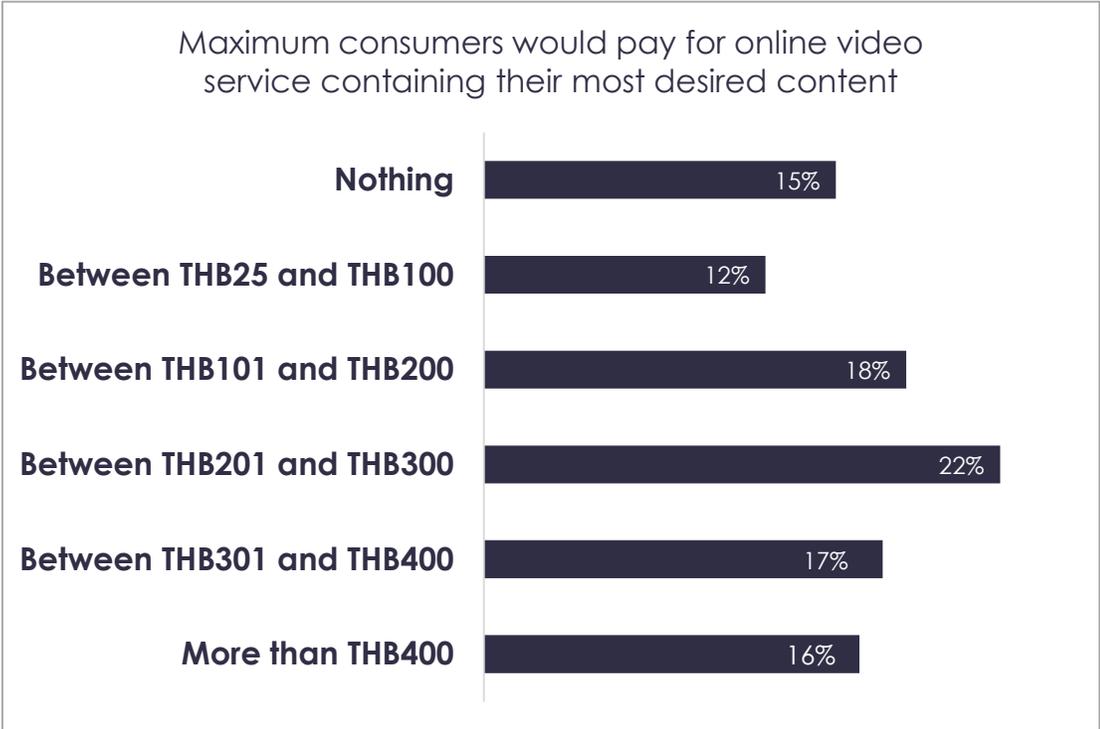
Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 264 total respondents in Thailand

Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 264 total respondents in Thailand

# OTT paid video service still expensive: pay-per-use model could be a good alternative

With the average online video subscription costing THB227, 45% of consumers are outside its range

Nearly two-thirds of Thai online users open to paying for one-time passes

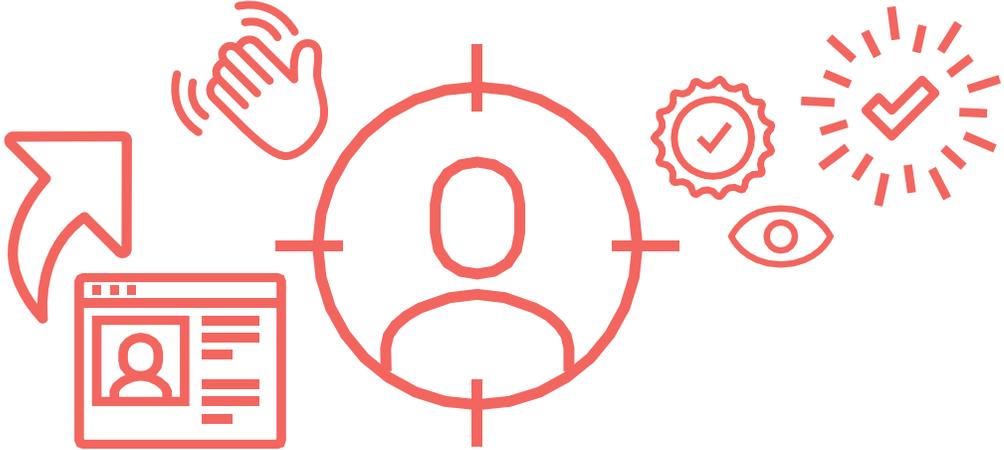
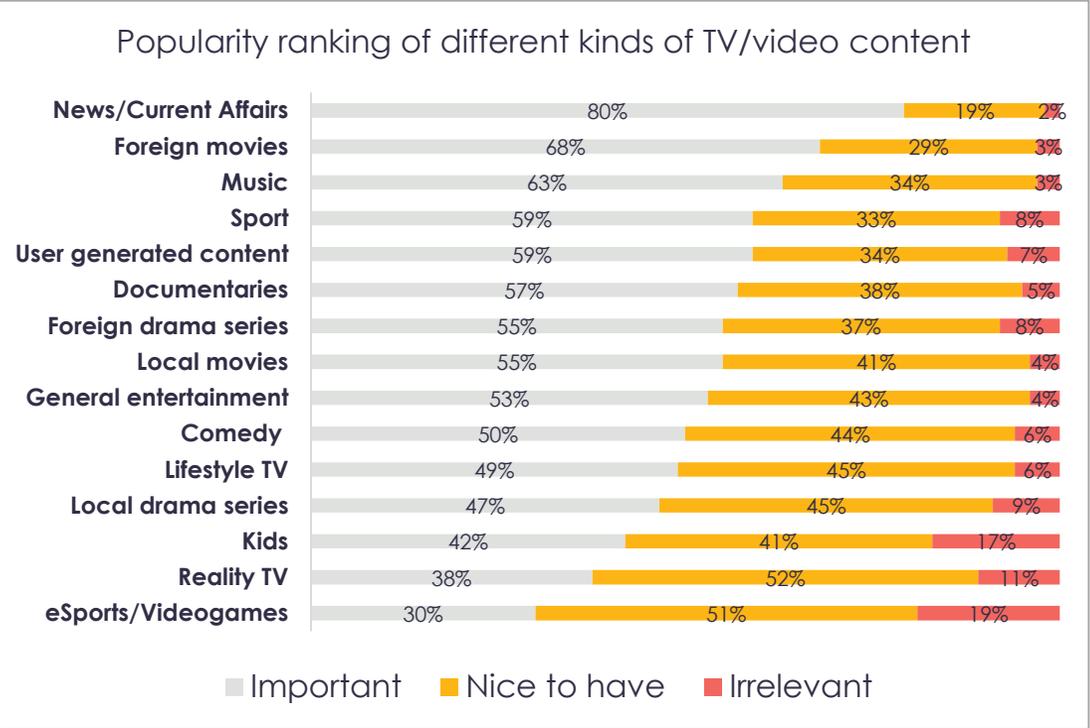


Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 264 total respondents in Thailand

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Source data: Amdocs' commissioned consumer survey. 264 total respondents in Thailand

# Foreign content, sport, along with local content are important for Thais

Sport ranks highest in both Thailand and India among preferred TV/video content

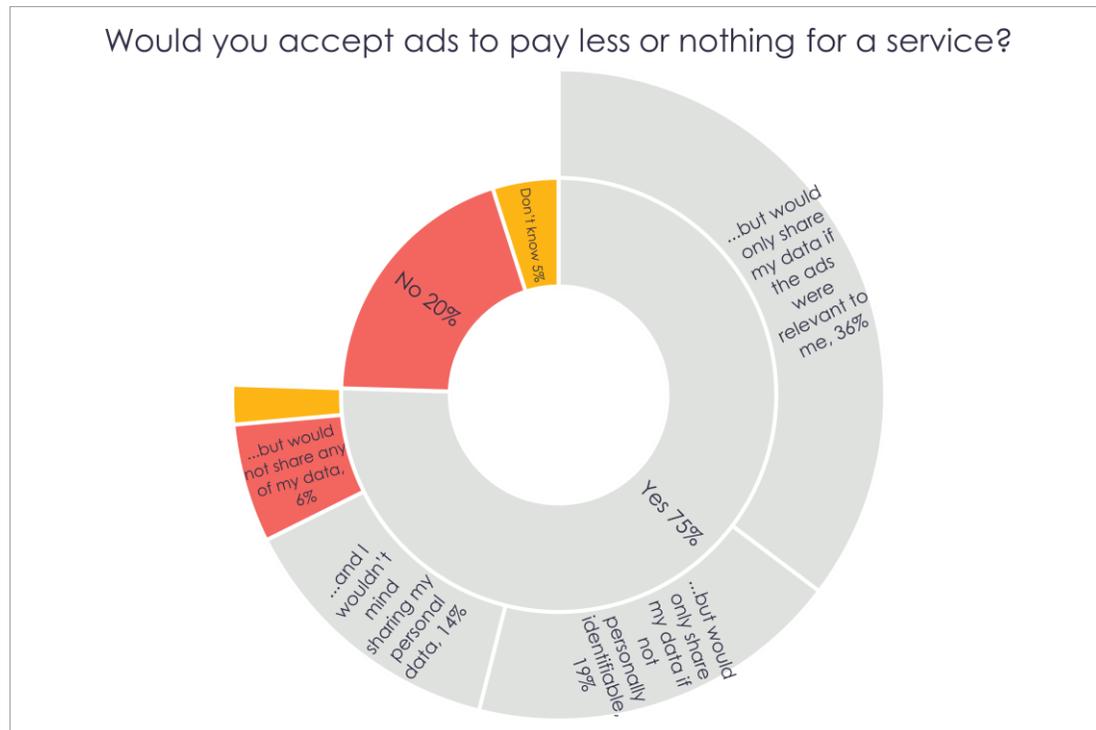


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Source data: Amdocs' commissioned consumer survey. 264 total respondents in Thailand

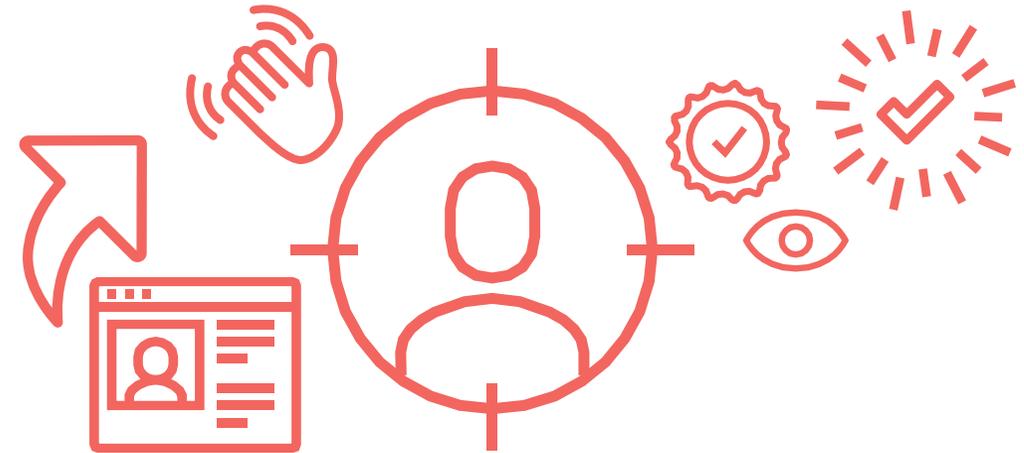


# Thais won't mind getting ads or sharing personal data in return for reduced OTT cost

Thais are the most accepting of advertising



Source: Ovum  
Source data: Amdocs' commissioned consumer survey. 264 total respondents in Thailand



A young woman with dark hair is wearing large white and black headphones. She is smiling broadly and holding a small piece of popcorn to her mouth. She is wearing a grey t-shirt. In the foreground, a purple bowl filled with popcorn is visible. The background is dark with several out-of-focus, warm-toned bokeh lights. A white horizontal line is positioned above the text.

Thank you