

PREMIUM OTT BUILDING ITS RIGHTFUL PLACE IN THE DIGITAL MARKET



INDONESIA & THAILAND

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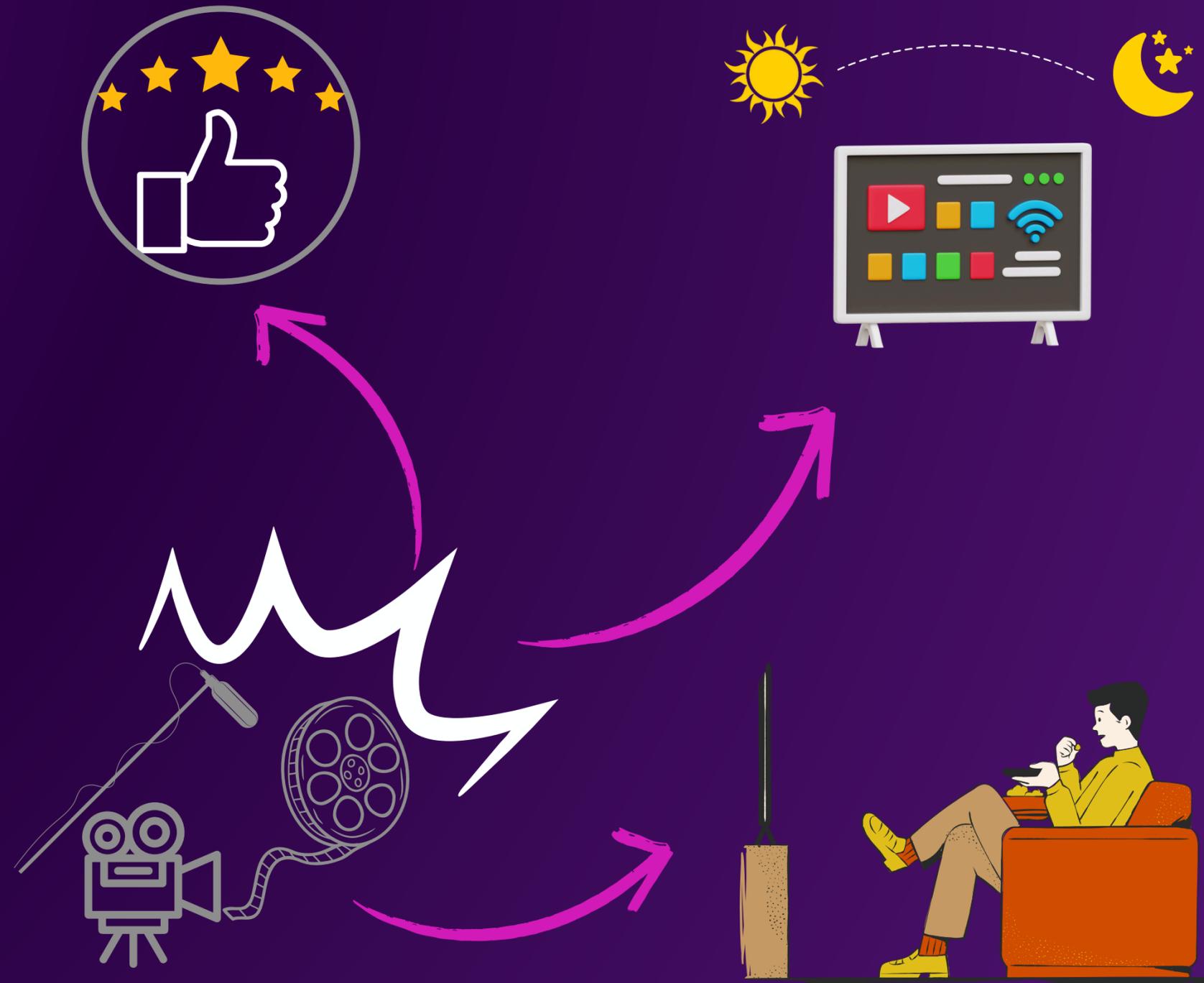


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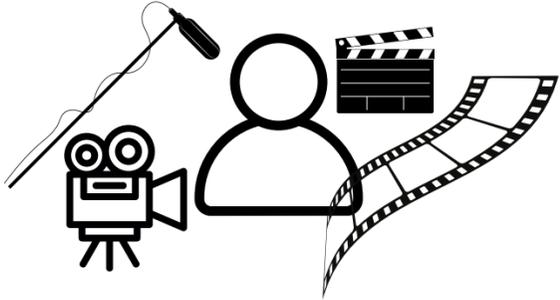
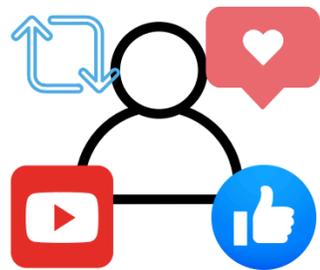
UNLOCK ENGAGED AUDIENCES

Professional Video unequivocally delivers **Quality Content**, garners **Consumer Attention** and is considered **Time Better Spent** than Social Video where Negative Emotions dominate.

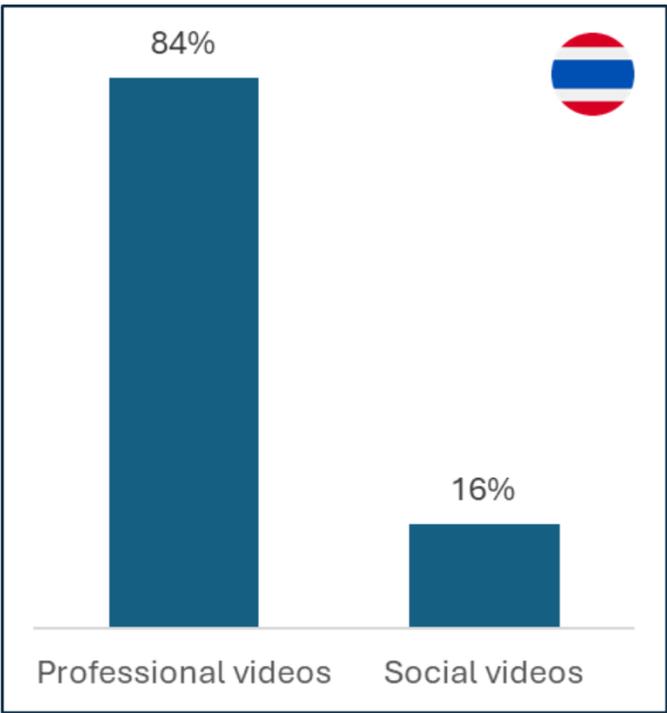
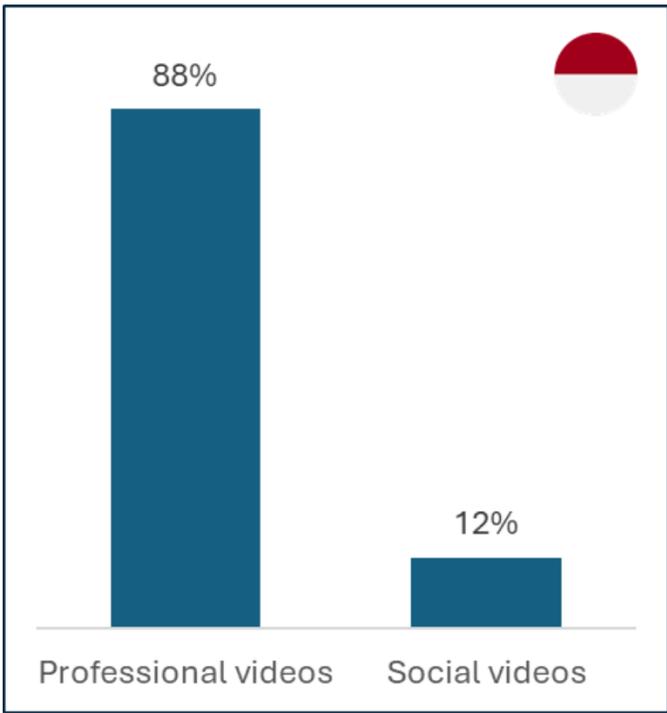


Professional videos are universally synonymous with quality

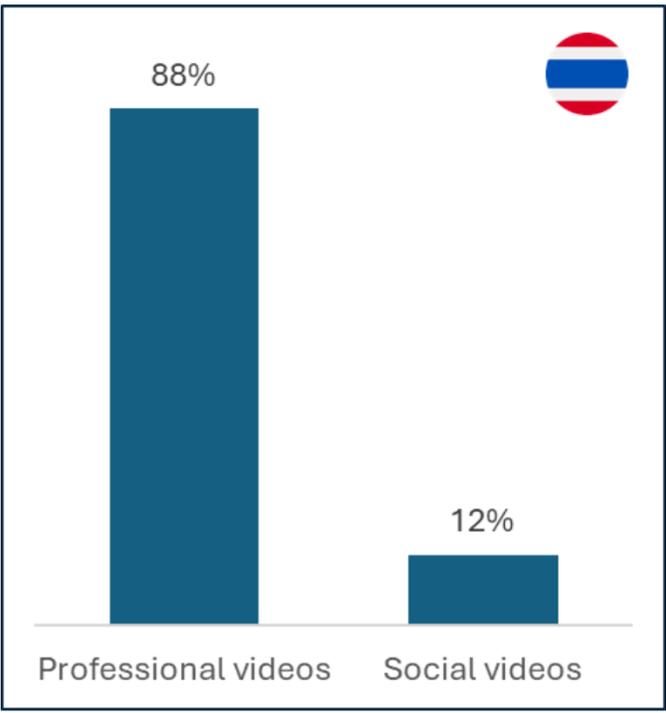
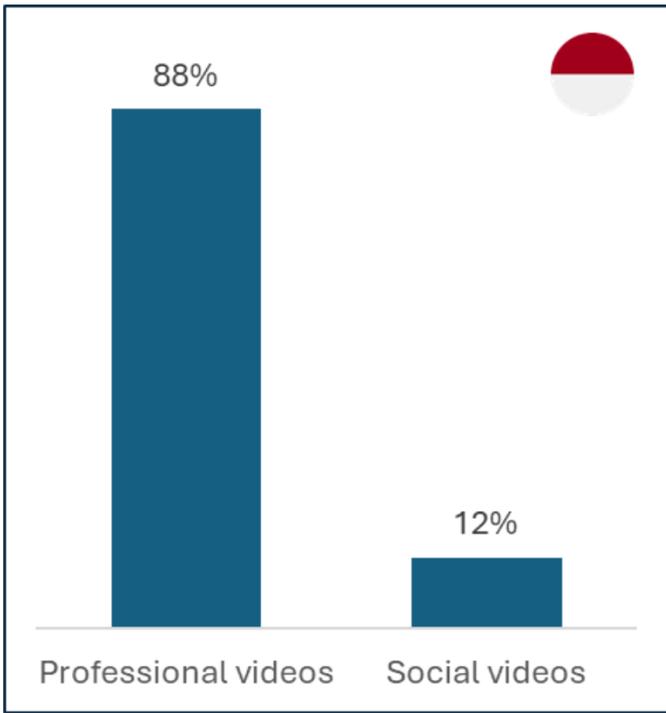
Close to 9 in 10 respondents (both in general and heavy users of professional videos) in both markets say that professional videos have better video quality.



All Respondents (n=500)



Professional Video Heavy Users (n=205)



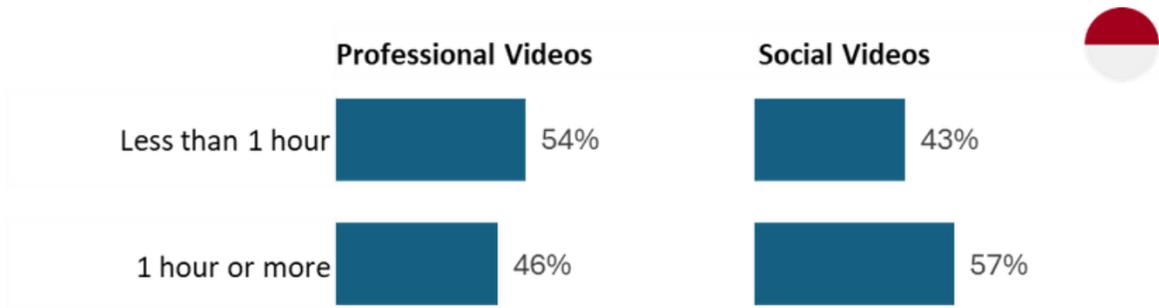
Video Quality
Base: All Respondents (ID n=500 | TH n=500) | Professional Video Heavy Users (ID n=205 | TH n=238)

When you think of the quality of videos in general, which one of the following do you think has better video quality?

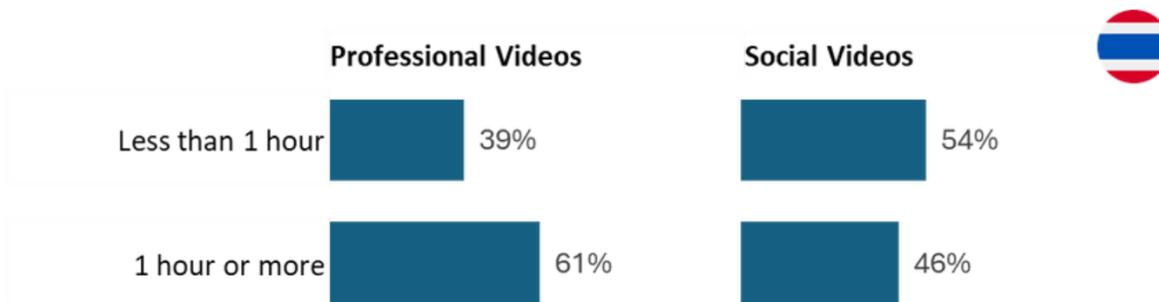
People watch professional videos for longer

Most respondents in Thailand are watching professional videos for 1 - 2 hours, longer than watching social videos (30 - 60 minutes).

All Respondents (n=500)



All Respondents (n=500)



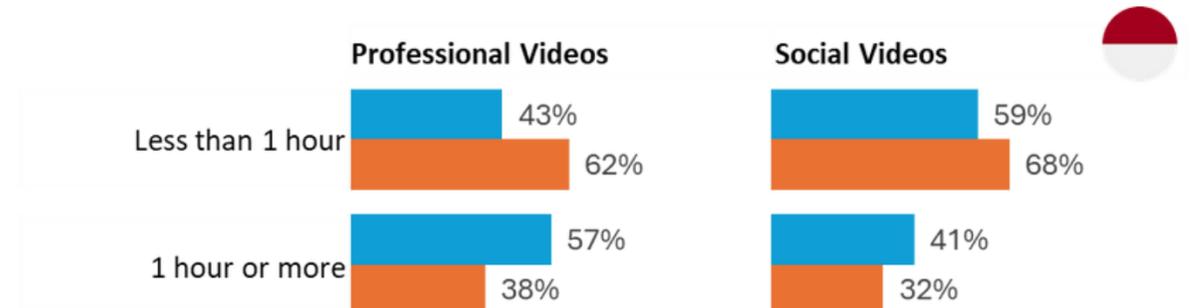
Social & Professional Video Consumption Duration

Base: All Respondents (ID n=500 | TH n=500)

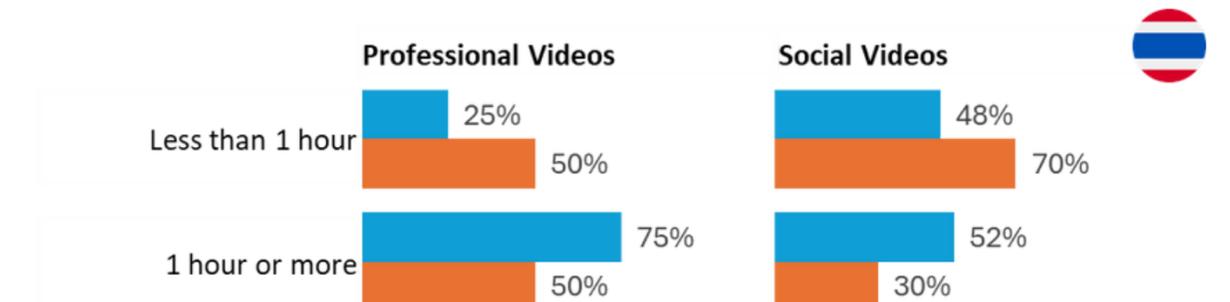
On average, how long do you typically spend watching social videos/professional videos in one sitting?

Heavy professional video users from both markets are more likely to watch professional videos for longer periods of time than light users.

All Respondents (n=500)



All Respondents (n=500)



On average, how long do you typically spend watching social videos/professional videos in one sitting?

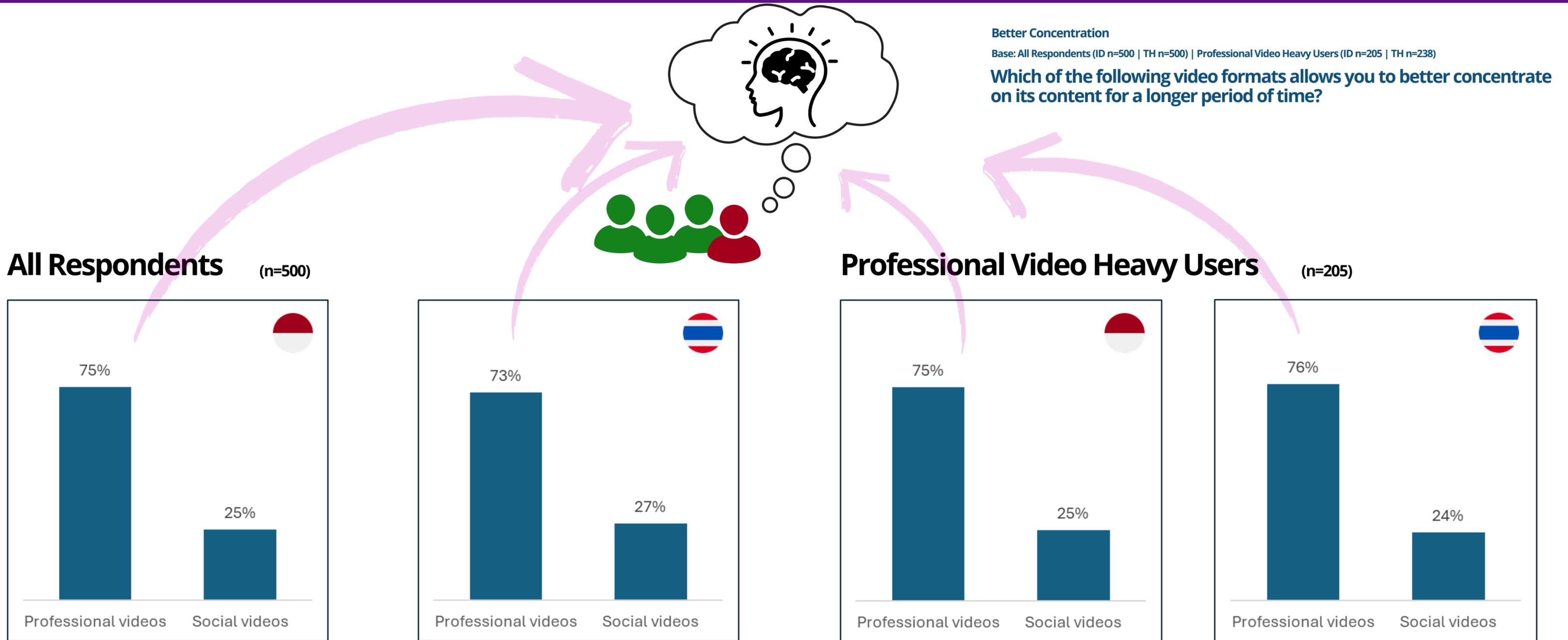
Social & Professional Video Consumption Duration

Base: Professional Video Heavy Users (ID n=205 | TH n=238) | Professional Video Light Users (ID n=295 | TH n=262)

■ Heavy professional video users
■ Light professional video users

Viewers concentrate much more when watching professional videos

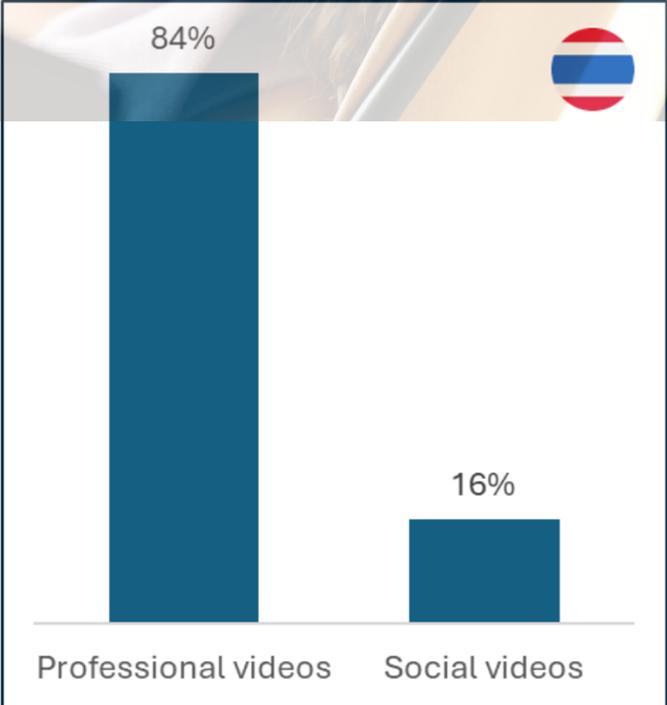
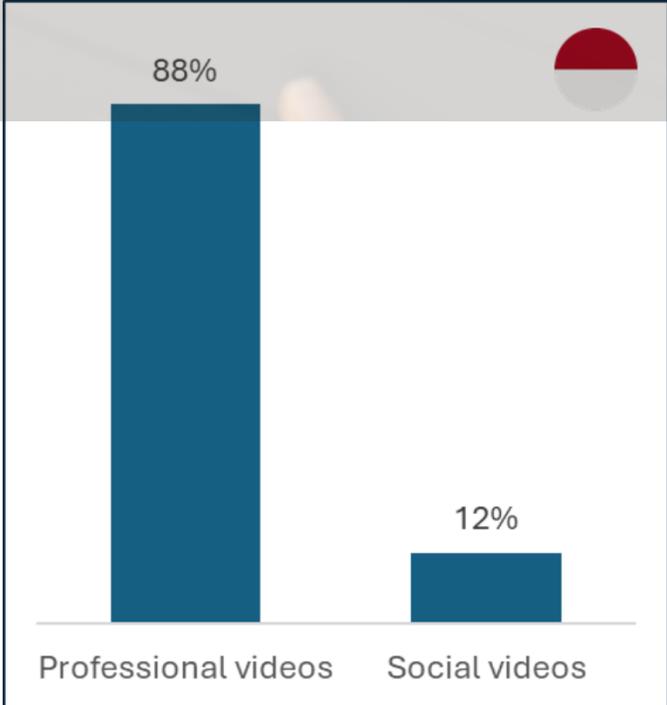
3 out of 4 respondents believe that professional video platforms help maintain better concentration for longer periods compared to social videos.



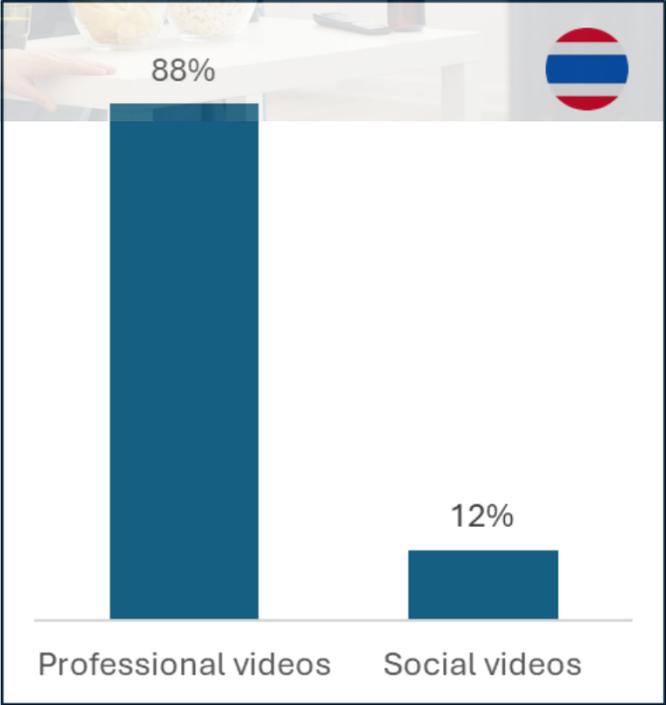
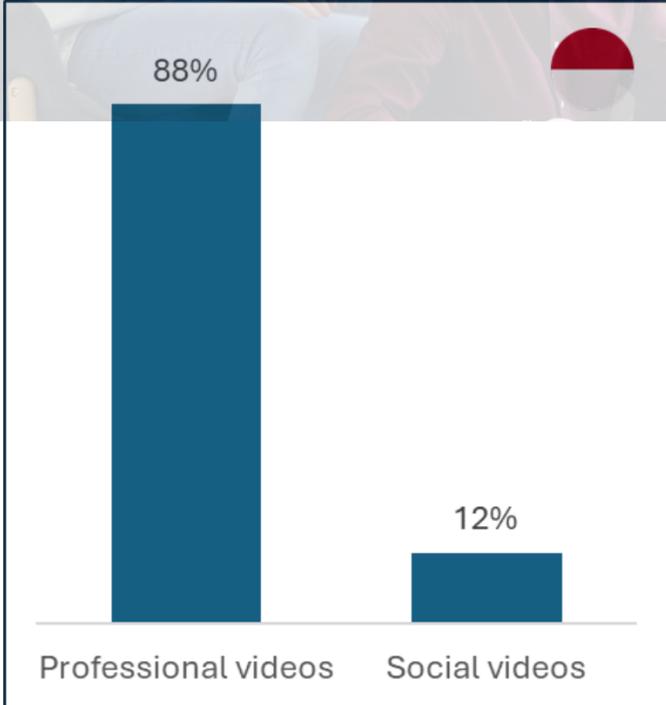
Time is much better spent watching professional videos

Both general population and professional video heavy users in both markets agree that time is better spent when watching professional videos compared to social videos.

All Respondents (n=500)



Professional Video Heavy Users (n=205)



Time Better Spent

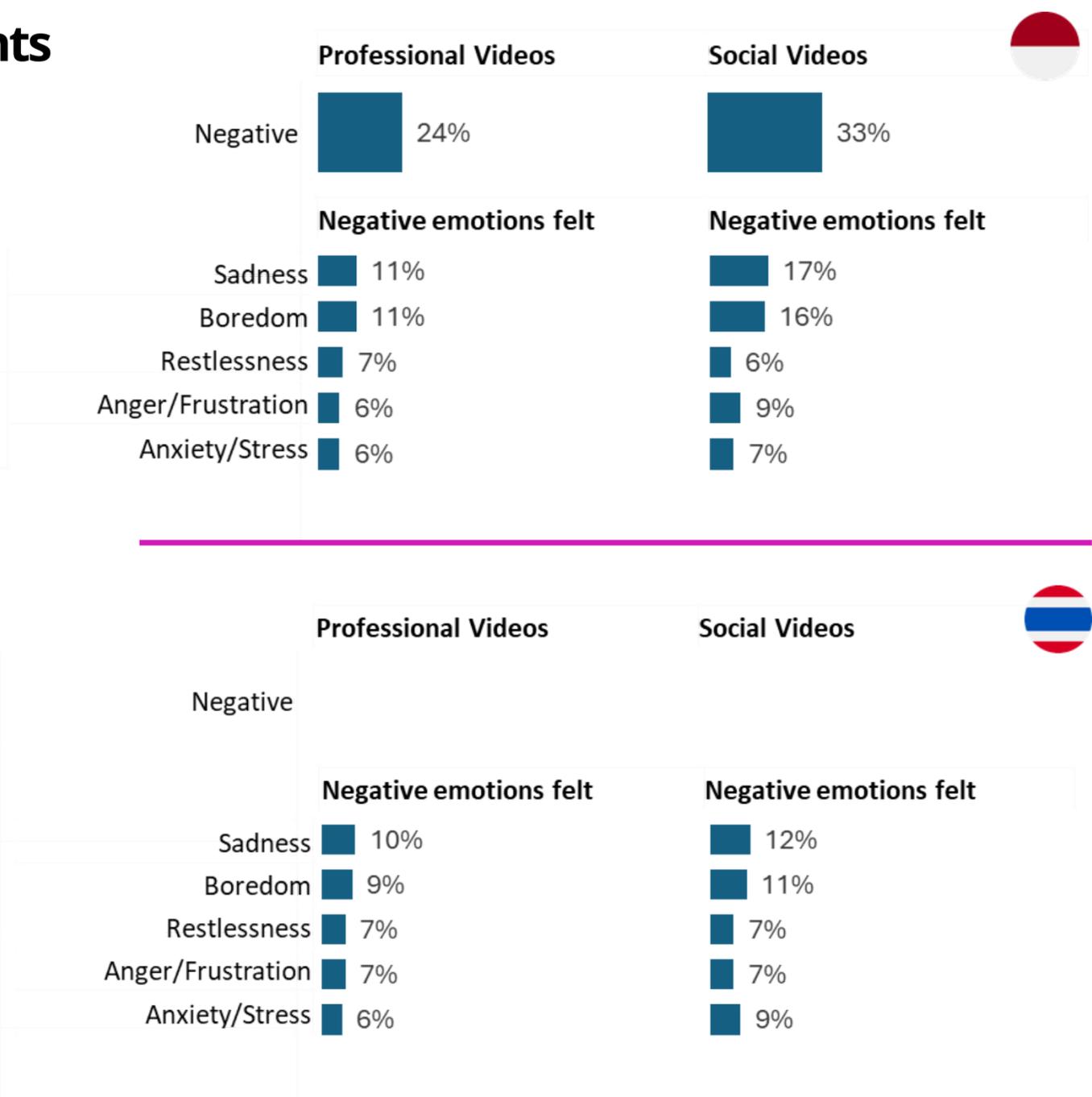
Base: All Respondents (ID n=500 | TH n=500) | Professional Video Heavy Users (ID n=205 | TH n=238)

Which of the following do you think is time better spent while watching?

Social videos elicit more negative emotions in viewers than professional videos

All Respondents

(n=500)



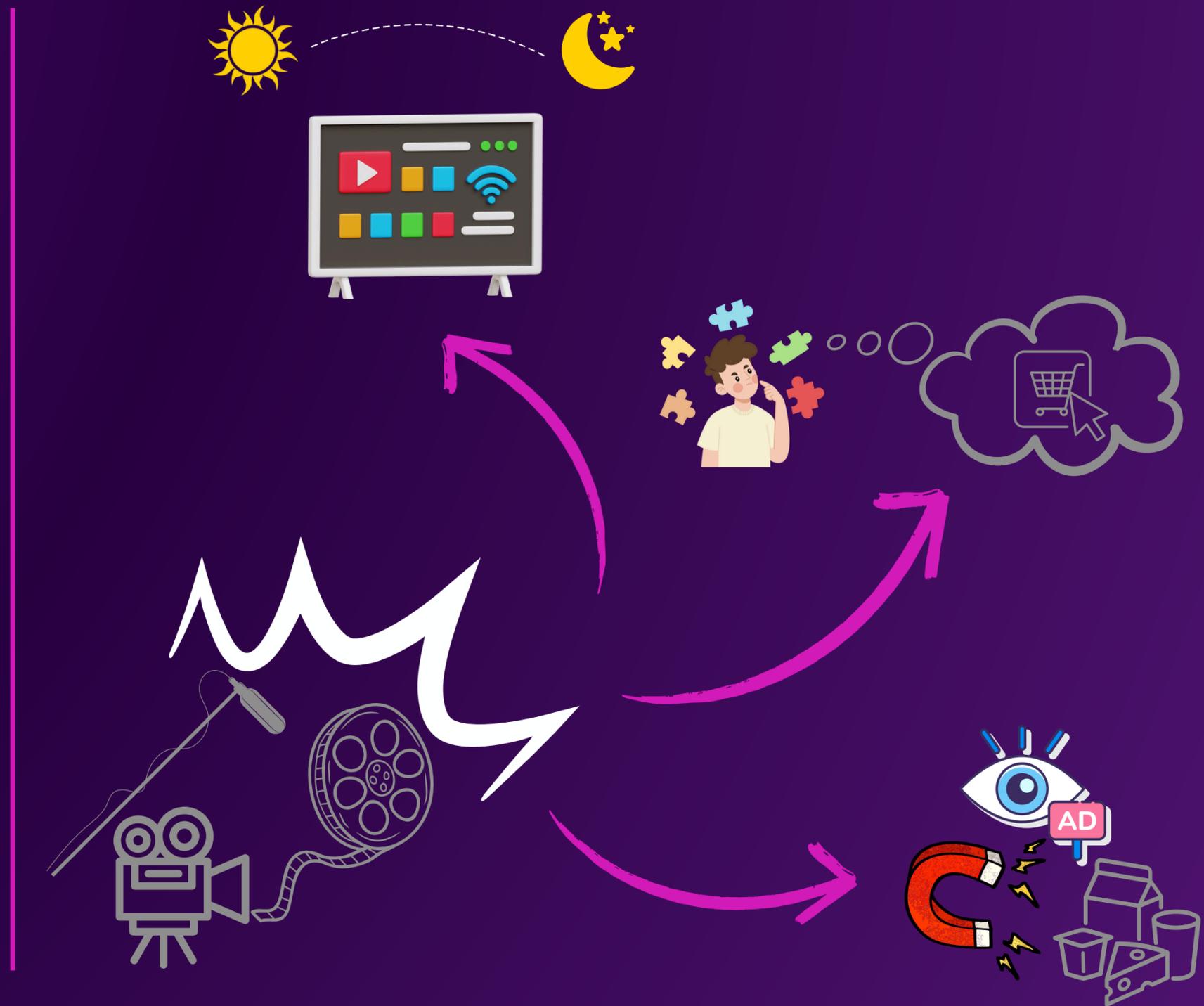
Users generally experience more negative emotions after watching social videos continuously for 30 minutes.

Emotions After Watching Social & Professional Video
 Base: All Respondents (ID n=500 | TH n=500)

Which of the following emotions are you likely to feel after watching social videos/professional videos continuously for 30 minutes?

THE PREMIUM ADVANTAGE FOR ADVERTISING

In Indonesia ads clearly work better on Professional Videos and while results in Thailand are less clear, the higher frequency of ads on Social Videos likely skews the picture.

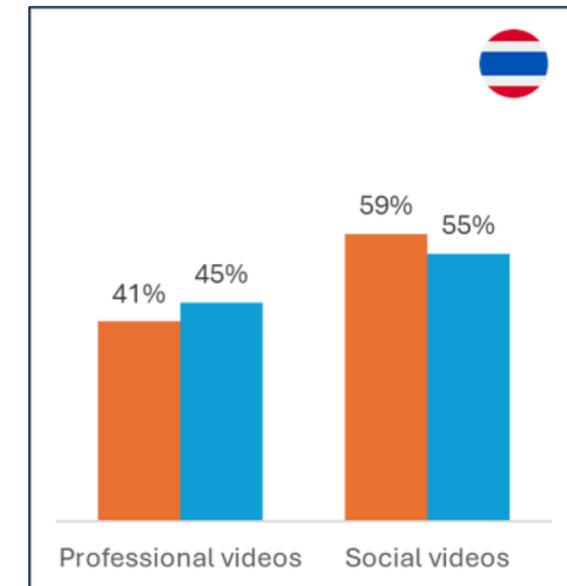
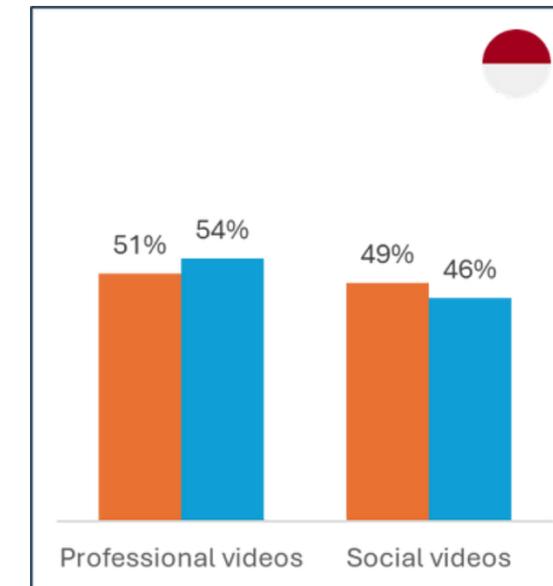
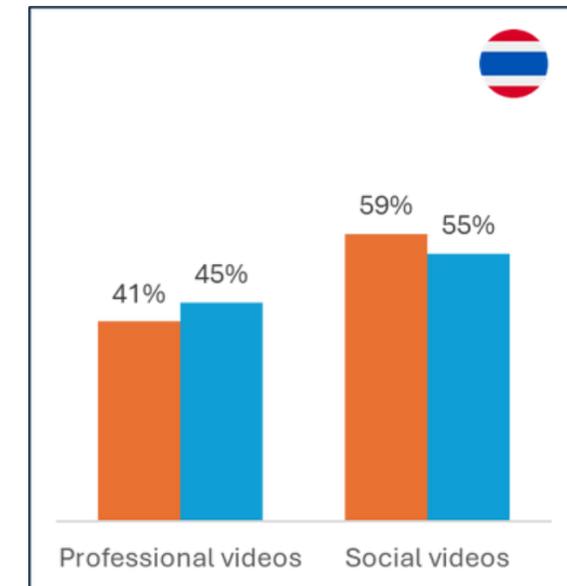
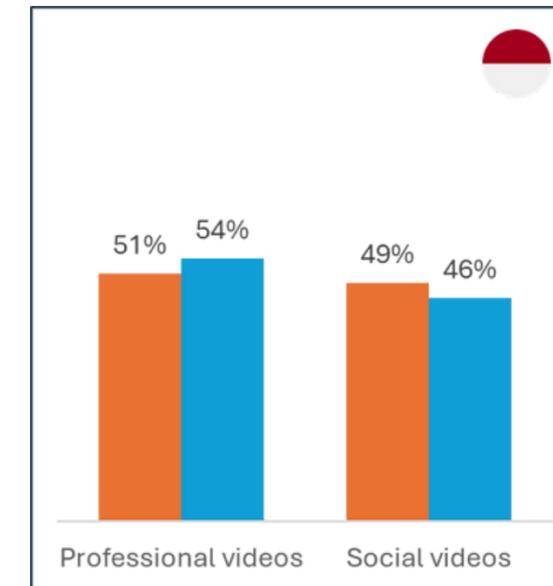
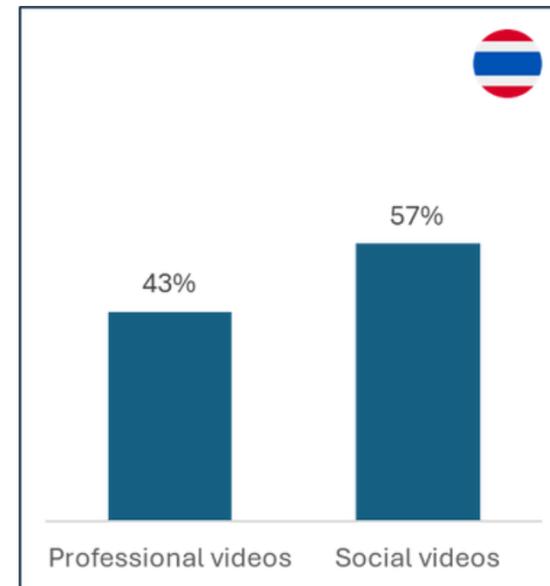
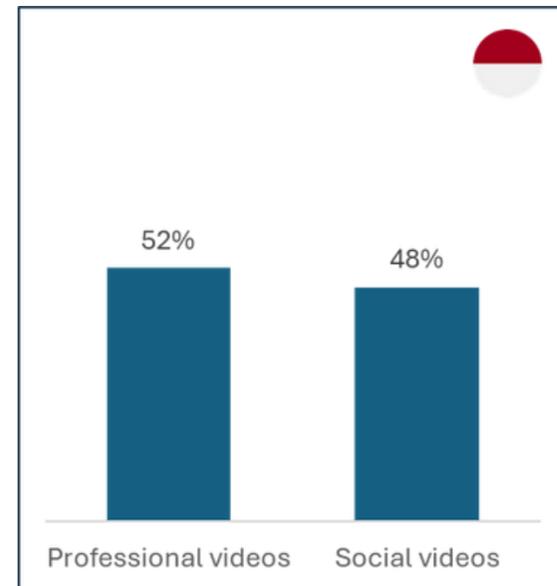


Viewers in Indonesia pay more attention to ads played in professional videos than social videos



Professional videos have slightly better performance when it comes to grabbing people's attention to its advertising in Indonesia.

All Respondents (n=500)



Pay Attention to Advertising

Base: All Respondents (ID n=500 | TH n=500) | Professional Video Heavy Users (ID n=205 | TH n=238) | Professional Video Light Users (ID n=295 | TH n=262)

Which of the following are you more likely to pay attention to advertising?

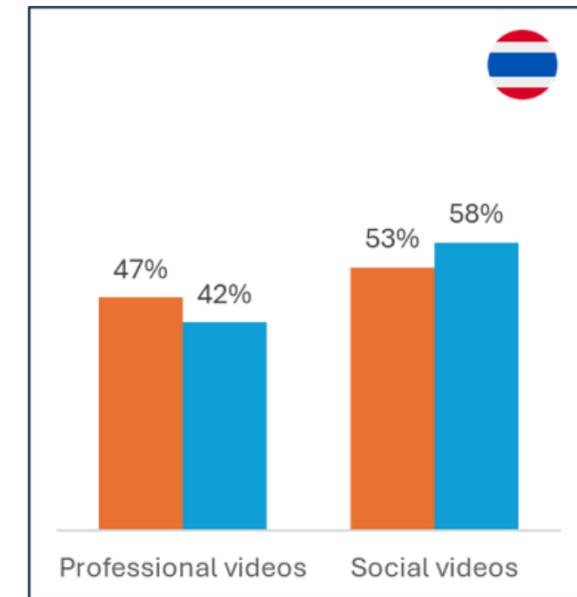
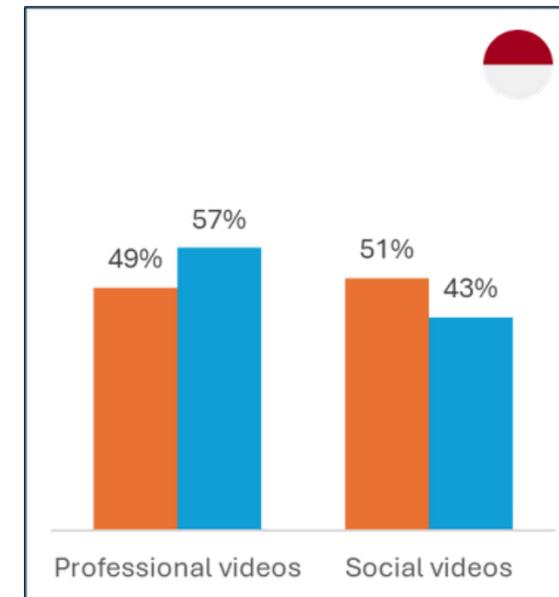
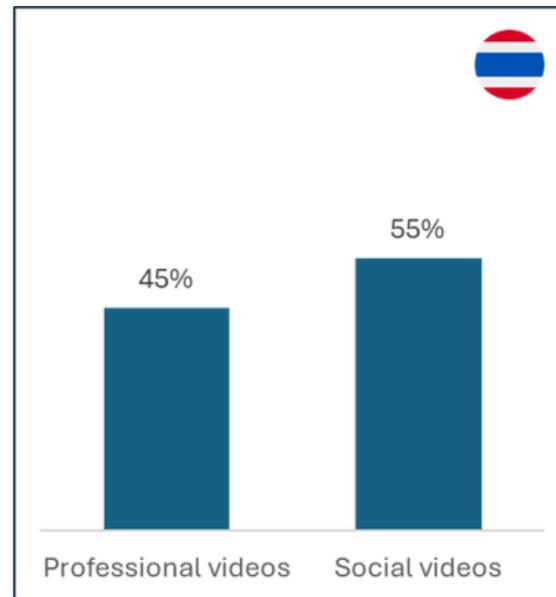
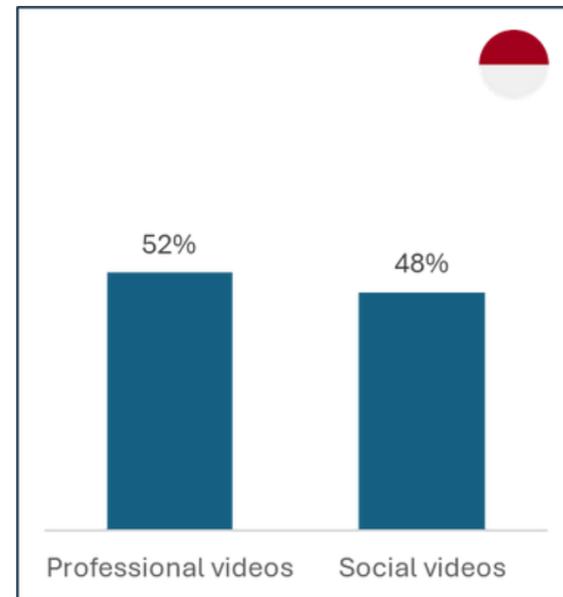
- Heavy professional video users
- Light professional video users

There is also greater follow-up from Indonesian viewers on ads played in professional videos over social videos

Both general population and professional video heavy users in Indonesia think that they are more likely to find out more information on a product or service when watching ads on professional video platforms.



All Respondents (n=500)



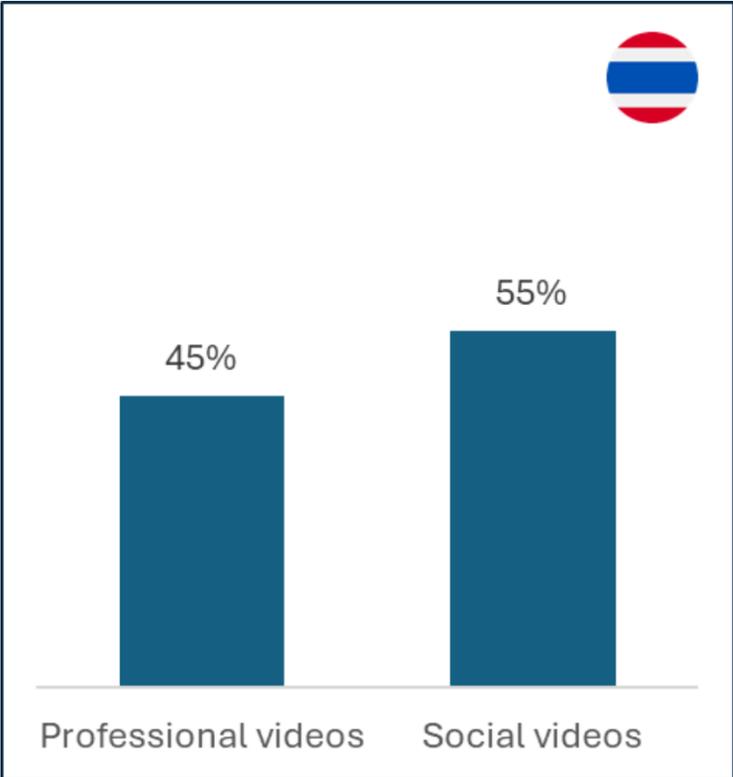
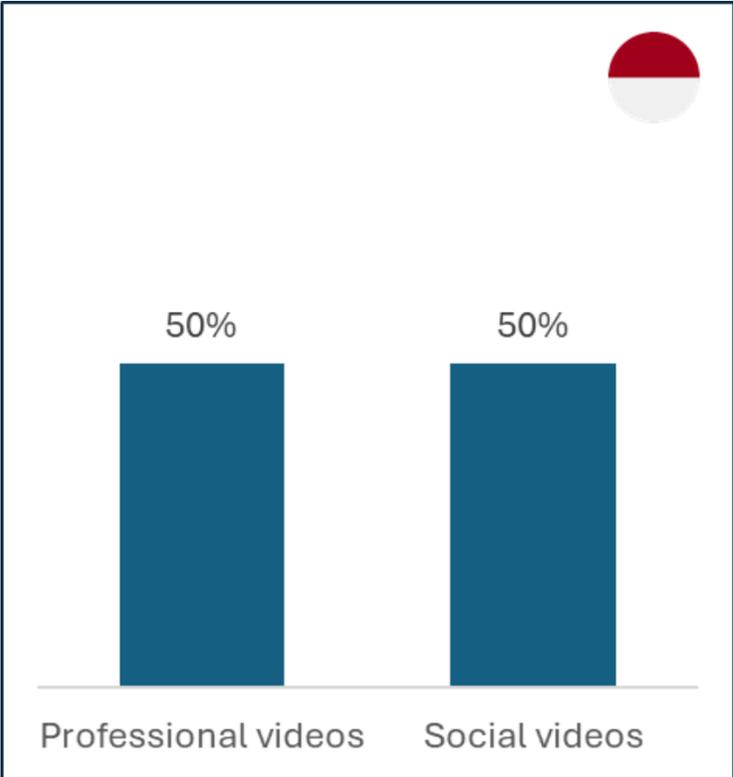
Find Out More Information

Base: All Respondents (ID n=500 | TH n=500) | Professional Video Heavy Users (ID n=205 | TH n=238) | Professional Video Light Users (ID n=295 | TH n=262)

■ Heavy professional video users
■ Light professional video users

Which of the following are you more likely to find out more information on a product/service when watching advertisements?

Indonesian professional video heavy users are more likely to purchase a product from an ad seen in a professional video



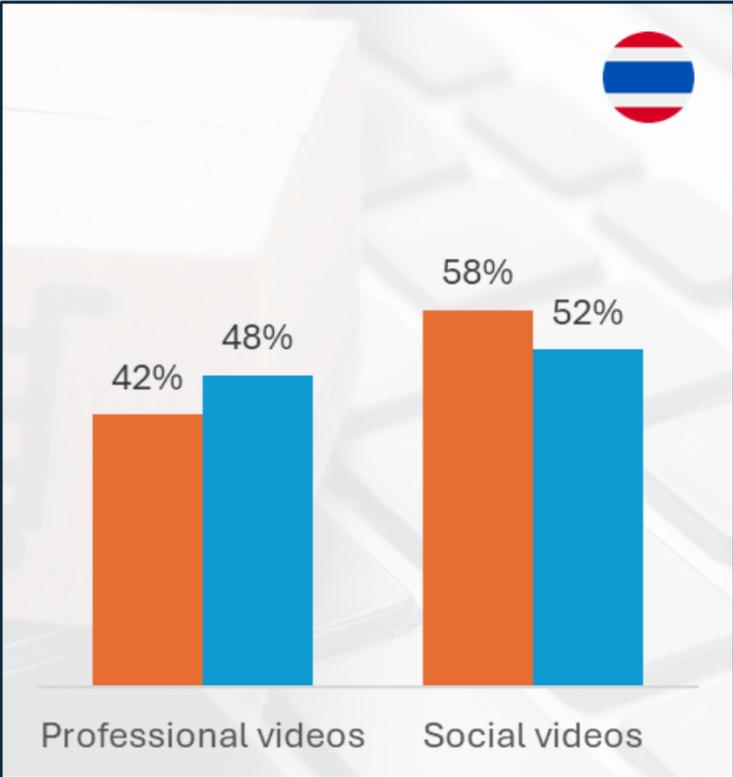
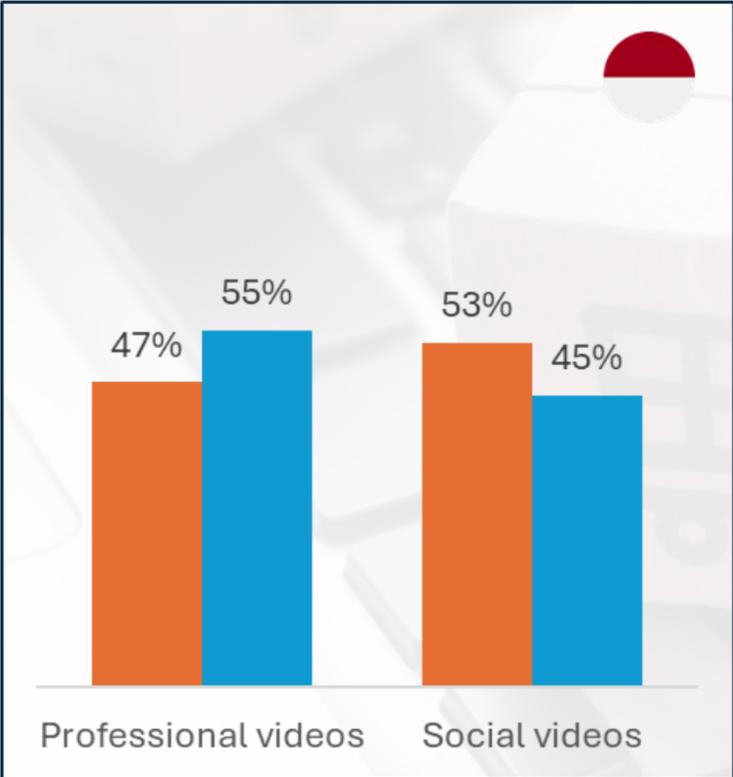
All Respondents (n=500)

- Heavy professional video users
- Light professional video users

More Likely to Purchase A Product

Base: All Respondents (ID n=500 | TH n=500) | Professional Video Heavy Users (ID n=205 | TH n=238) | Professional Video Light Users (ID n=295 | TH n=262)

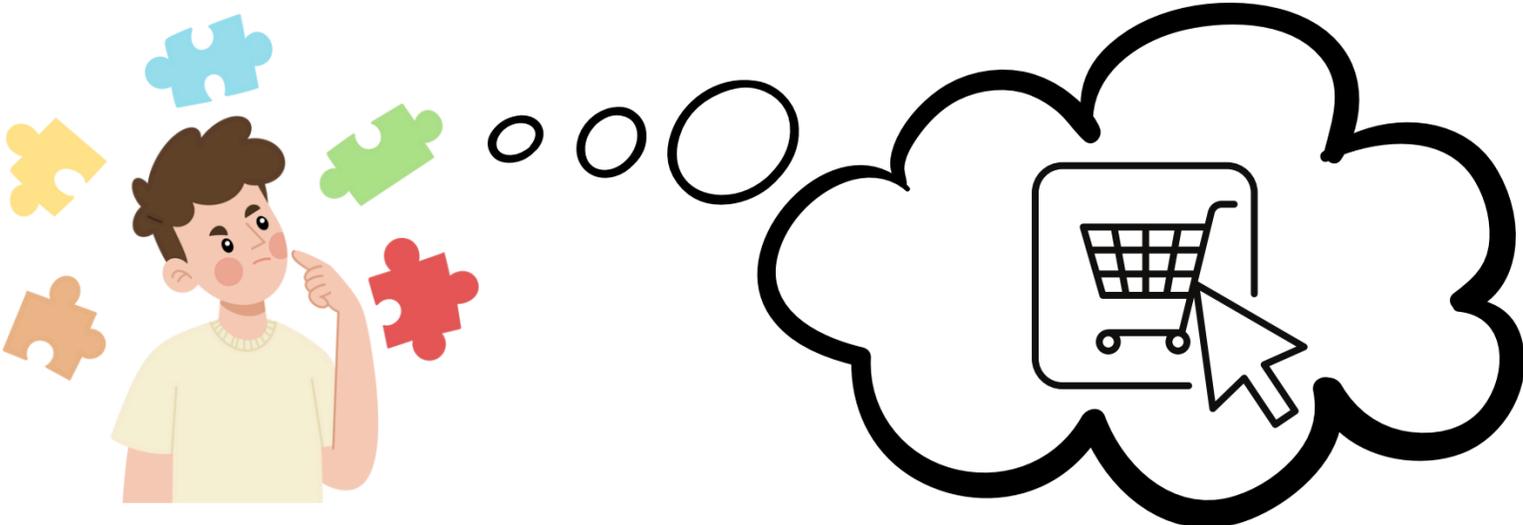
Which of the following are you more likely to purchase a product/service when watching ads?



Professional video heavy users in Indonesia are more likely to purchase a product/service when watching advertisements in professional video platforms compared to social videos.

They are also more likely to recall the ad

Professional video users in Indonesia are more likely to remember advertisements when watching them in professional video platforms compared to social videos.



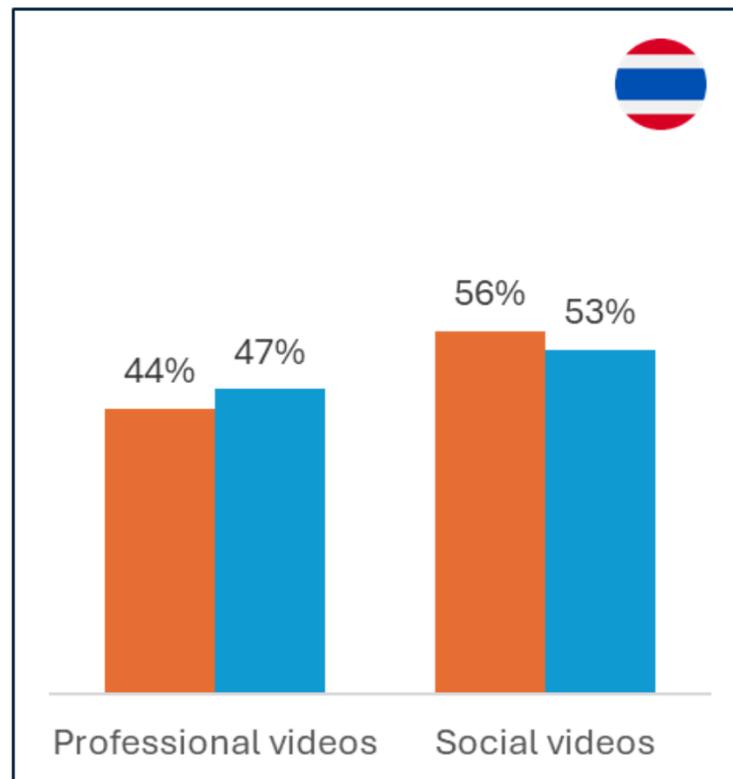
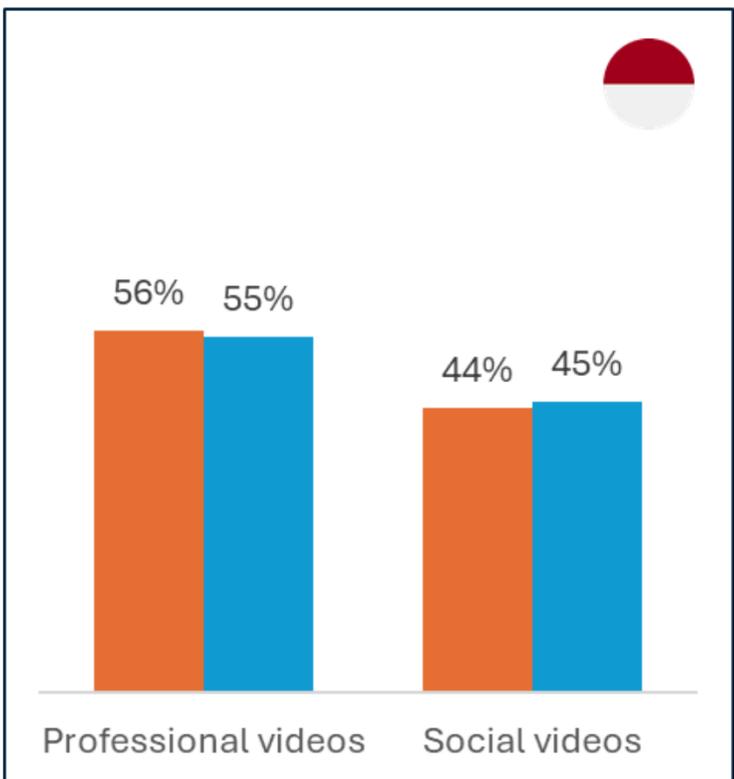
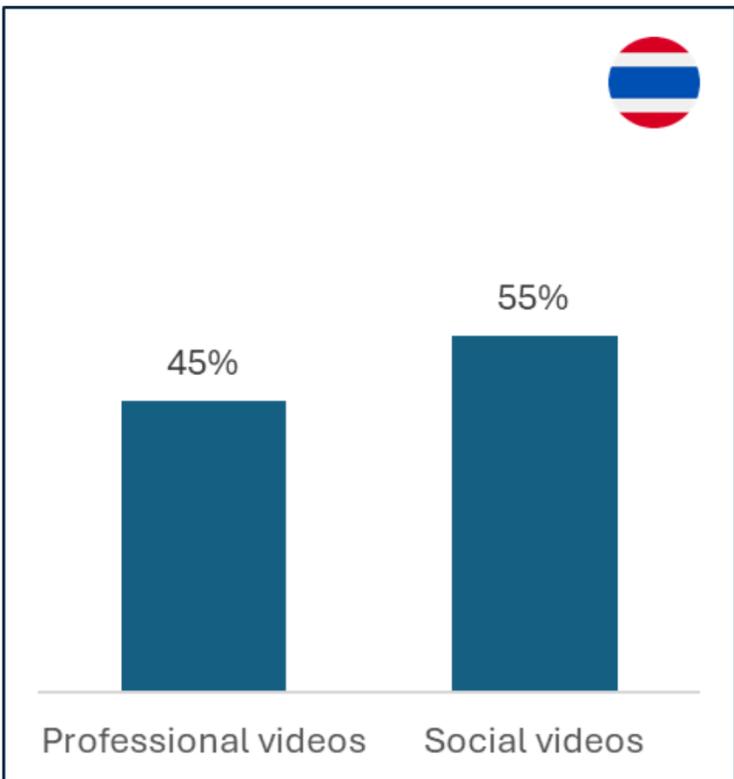
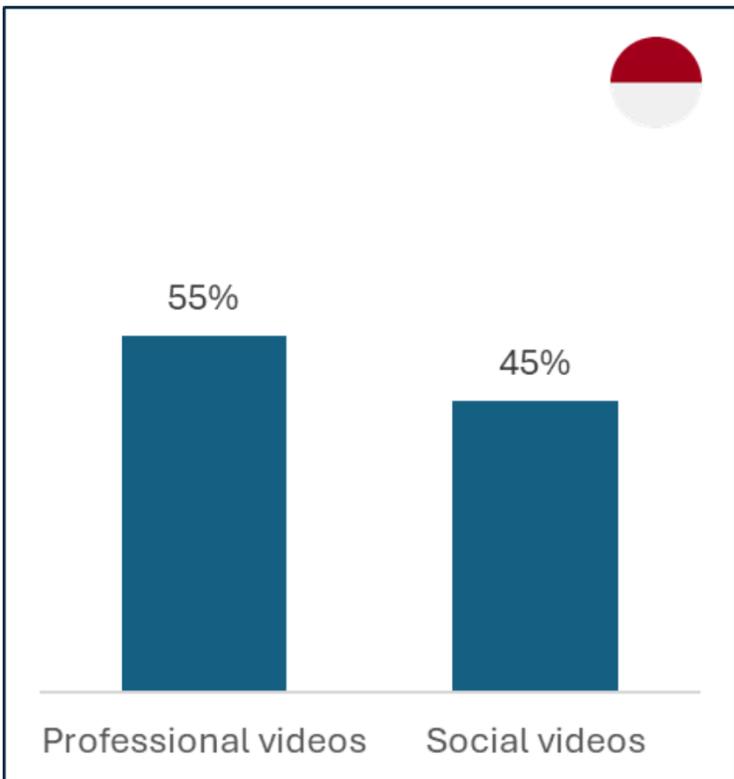
All Respondents (n=500)

- Heavy professional video users
- Light professional video users

More Likely to Remember An Advertisement

Base: All Respondents (ID n=500 | TH n=500) | Professional Video Heavy Users (ID n=205 | TH n=238) | Professional Video Light Users (ID n=295 | TH n=262)

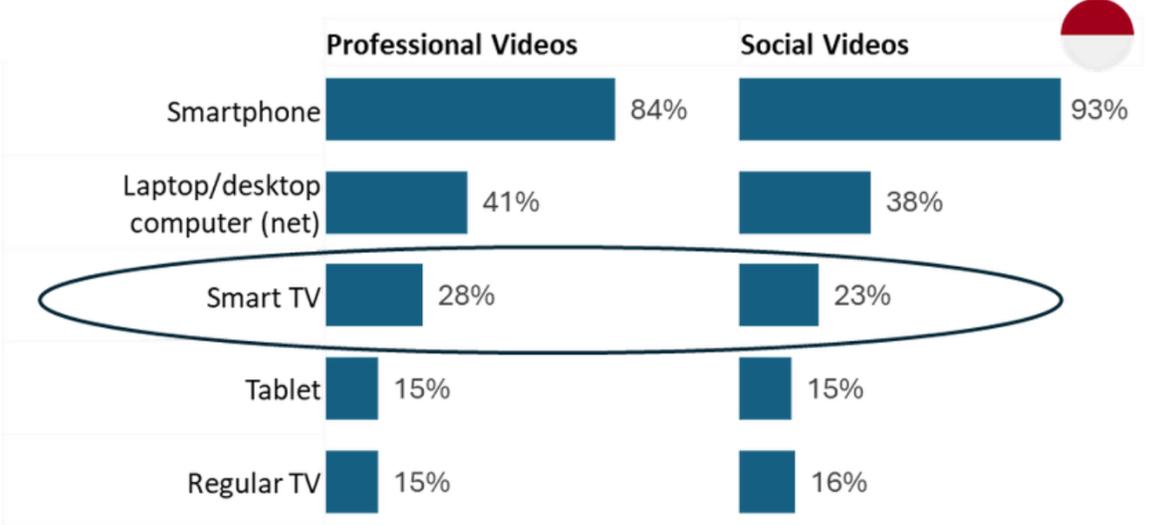
Which of the following are you more likely to remember advertisements that you have seen?



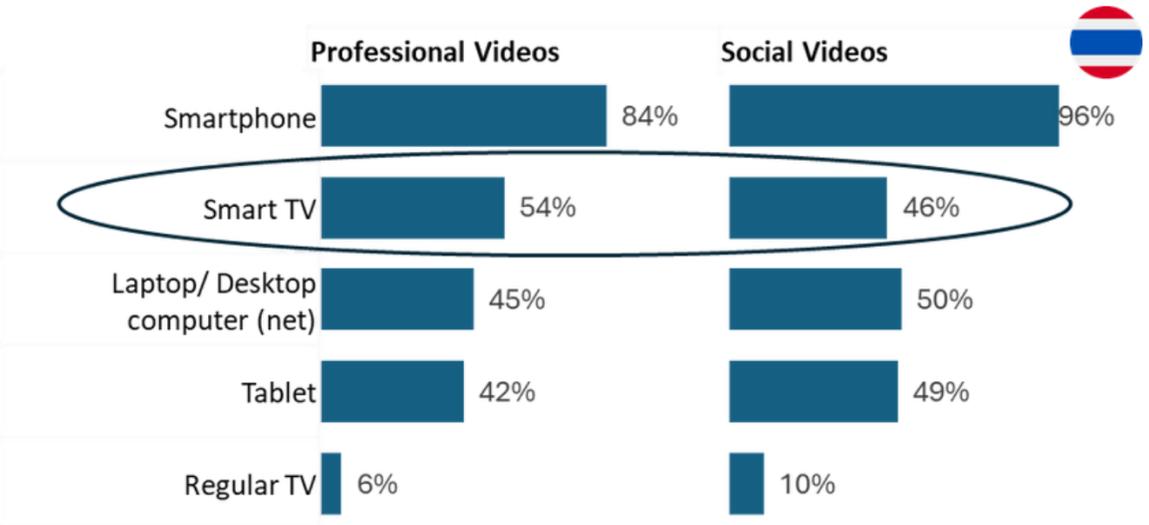
Professional videos trump social in the Smart TV universe

Smartphones still dominate as device of choice for all videos.

All Respondents (n=500)



All Respondents (n=500)



More respondents use a Smart TV to watch professional videos than social videos

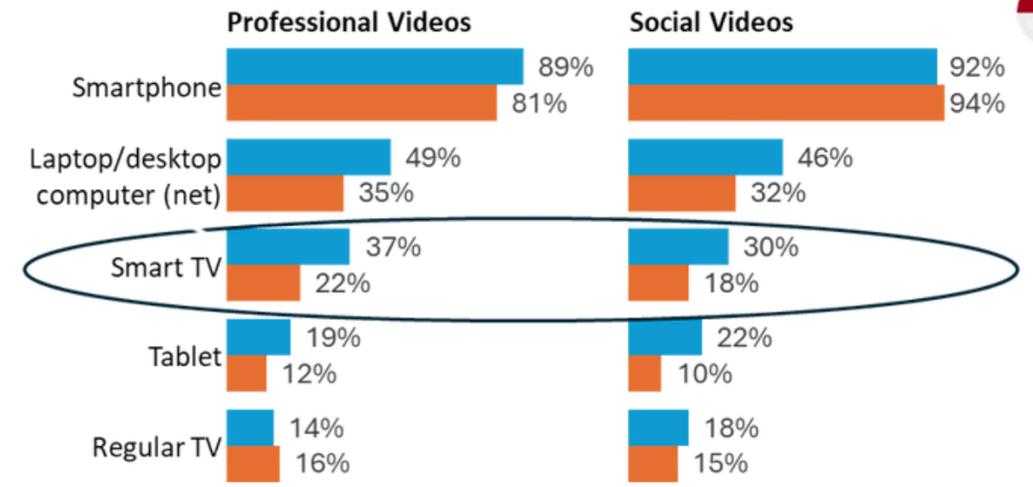
Device Used to Watch Social & Professional Videos
 Base: All Respondents (ID n=500 | TH n=500)
 What device(s) do you use to watch social videos/professional videos?

Heavy viewers watch more on all devices, but especially Smart TVs

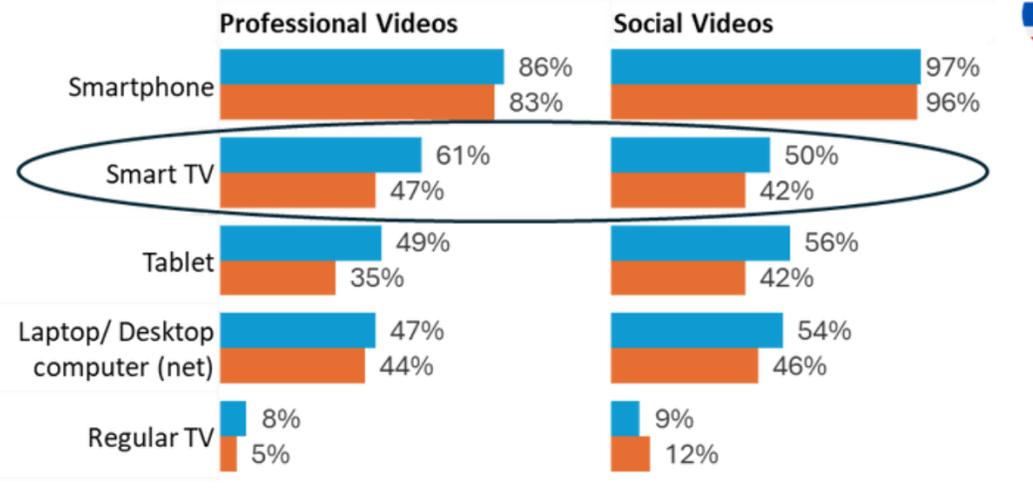


Heavy users of professional videos are more likely than light users to watch professional video on Smart TVs and tablets

All Respondents (n=500)



All Respondents (n=500)

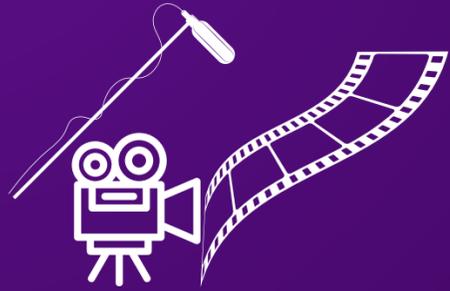


Device Used to Watch Social & Professional Videos

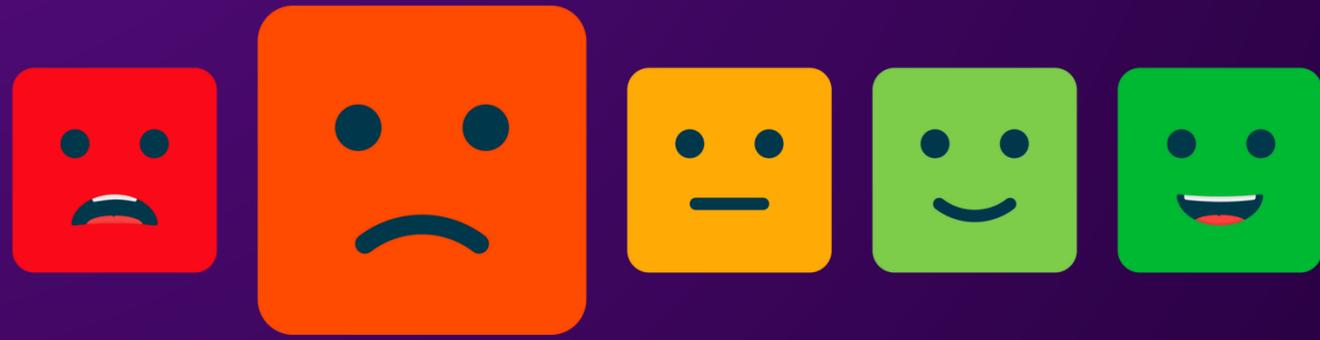
Base: Professional Video Heavy Users (ID n=205 | TH n=238) | Professional Video Light Users (ID n=295 | TH n=262)

What device(s) do you use to watch social videos/professional videos?

Summary



Professional videos perform better than social videos in almost all metrics, especially quality (88%).



Respondents experience more negative emotions (33%) after watching social videos continuously for 30 minutes compared to professional videos (24%).



Heavy viewers of professional videos are more likely to use SmartTVs and tablets to view professional videos.



When it comes to attention to advertising, finding out more information about the product, product recall and propensity to purchase, Indonesian viewers are more likely to rate professional videos more favourably.



In general, advertisements aired on professional video platforms are more likely to have an influence on heavy professional video viewers.

Research Specifications

Online Surveys

- Using Milieu's proprietary online panel
- Data representative of professional video users aged 16 and above in Indonesia & Thailand with minimum 200 samples of professional video heavy users per market
- Margin of +/- 4% at 95% confidence
- Data collected in November 2024



Methodology

Online research via Milieu's proprietary panel



Sample Size

N = 500 samples per market



Audience

Representative of Indonesian/Thai professional video users aged 16 and above. Quotas set for age and gender with minimum 200 samples of professional video heavy users per market

Definitions



Professional videos

Professional videos are those created by professional broadcasters and video streaming companies. Examples would include movies, drama series, variety shows, sports, news, etc; and can be seen on platforms such as Netflix, Disney+Hotstar, iQIYI, Viu, WeTV, Vidio, Mola TV, GoPlay, Catchplay+, TRUEID, AIS Play. We will be calling this category of videos "Professional videos". (For the purposes of this survey, we are NOT including programmes/videos that you watch on local TV or cable TV).



Social videos

Social media or user generated videos are those created by ordinary people or social media influencers. These videos may be seen on platforms like TikTok, Facebook, Line, YouTube etc. In this survey, we will be calling this category of videos "Social videos".



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