

A woman with dark hair, wearing a white boxing shirt and red boxing gloves, is looking directly at the camera. Her right glove is raised towards her face. The background is dark and out of focus.

amagi

Amagi Global FAST Report Edition #7 | May 23

Packing a punch in APAC: FAST continues to boom

Delve into comprehensive data and insights powered by Amagi's homegrown data analytics platform – [Amagi ANALYTICS](#) and the Amagi Consumer Survey August 2022 to January 2023.

Analysis period – Q4 2021 (Oct-Dec) vs. Q4 2022 (Oct-Dec)

With the seventh edition of Amagi Global FAST Report, we focus on the APAC region and bring data and insights from 50+ FAST platforms and ~2700 channels that run on Amagi's SSAI platform – [Amagi THUNDERSTORM](#).

The report also provides audience insights and viewing habits based on the Amagi Consumer Survey data, which surveyed ~600 APAC households from August 2022 to January 2023. The survey participants were from all walks of life, spanning the lower, middle, and higher income groups – those who fulfilled the survey criteria of having watched TV at least once in the previous week.

Amagi Global FAST Reports | Quick Recap

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The demand for free content is the biggest catalyst for **FAST** growth

Free Ad-supported Streaming TV (FAST) is making giant leaps in the APAC region, especially in India and Australia. The primary reason for this surge in popularity is that audiences in both these countries don't mind watching ads as long as they get free content in return. Consumer surveys by Samsung Ads India and Australia confirm this finding.

According to feedback from 700 smart TV users in India and Australia, approximately [81%](#) and [61%](#), respectively, stated that they watched advertisements as a trade-off for accessing free content. New Zealand shows a similar trend with Nielsen Consumer and Media Insights Q4 2021 suggesting a [28%](#) hike in smart TV purchases through 2020 and 2021. Also, smart TVs remained the third most popular devices for Kiwis to watch BVOD (Broadcast Video On Demand) through the same period.

Data from [Amagi ANALYTICS](#) reinforces this finding by showing a consistent rise in Hours Of Viewing (HOV) and ad impressions for both countries. Specifically, India experienced a 63.3% increase in hours of viewing and a 77% increase in ad impressions, while Australia saw a 22.4% increase in hours of viewing and a 20% increase in ad impressions.

APAC – Analysis period – Q4 2022 (Oct-Dec) vs. Q4 2021 (Oct-Dec)

300%

growth in
ad impressions

275%

growth in
Hours of Viewing (HOV)

70%

growth in
channel deliveries

247%

growth in
daily unique users

The transition from DTH to CTV: Making FAST a faster success in India

Since its inception, Direct To Home (DTH) has been a crowd favorite in India. While most households still love it, a small section has already cut the cord. According to a report by KPMG, India had around [0.5 million](#) cord-cutter households in 2022, predicted to reach [13 million](#) by 2026. As a result, the DTH operators saw a decline in their subscriber count from [68.52 million](#) in December 2021 to [66.92 million](#) in the first quarter of 2022 (Jan-Mar). In other words, around [2.6 million](#) households give up their DTH connection on a YoY basis.

This trend is working in favor of Connected TVs (CTVs). As a result, India's CTV market is witnessing an exponential surge. According to a report by GroupM-Kantar, nearly [20-22 million](#) households in India are already equipped with a CTV, which is anticipated to double by the end of 2024.

As CTV sees improved adoption rates, FAST will continue to penetrate further into Indian living rooms. With this shift in consumer behavior, we can expect some big names to make their FAST debut in India.

FAST shows steady growth trends in New Zealand

New Zealand is another well-developed market in terms of CTV and FAST adoption. [Samsung Ads' report](#) indicates that CTV adoption rates have been consistently growing from 28% in 2020 to 50% in 2022, and the numbers are likely to continue showing a positive trend. Being a perfect breeding ground for FAST, New Zealand has attracted big names to offer their FAST services in the country. Here's a quick snapshot:

- **Freeview:** They launched an exclusive live TV app in December 2022 that is home to a variety of FAST channels.
- **TVNZ+:** Following a brand refresh, TVNZ+ offers popular VOD content as well as three FAST channels – TVNZ 1, TVNZ 2, and TVNZ Duke.
- **ThreeNow:** They offer on-demand content with a rich library of documentaries, reality shows, and four FAST channels.
- **Māori+:** Previously recognized as Māori Television, Māori+ primarily focuses on preserving New Zealand's indigenous culture by offering three FAST channels in the Māori language.

The Australian FAST market shows promising growth

Compared to India and other APAC countries, Australia is a fairly mature market in terms of CTV and FAST adoption. The 2022 Australian Communications and Media Authority (ACMA) report reinforces this by revealing that approximately [56%](#) of Australians use a CTV. The FAST growth story continues to unfold as we see some huge names already present in the country and new players stepping in. Here's a quick snapshot:

- **9Now:** This popular, originally Broadcast Video On Demand (BVOD) platform is set to reinvent the viewing experience by launching brand new 24x7 FAST channels. By introducing a 'start over' feature, they plan to offer complete control of their viewing experience, thus taking it up a notch.
- **7Plus:** Being home to over 40 FAST channels already, 7Plus plans to add more to its collection.
- **Paramount:** They launched 16 FAST channels between November and December 2022. These offer curated content across popular TV shows such as MasterChef Australia, Australian Survivor, Baywatch, and many more.

Other FAST platforms in Australia include

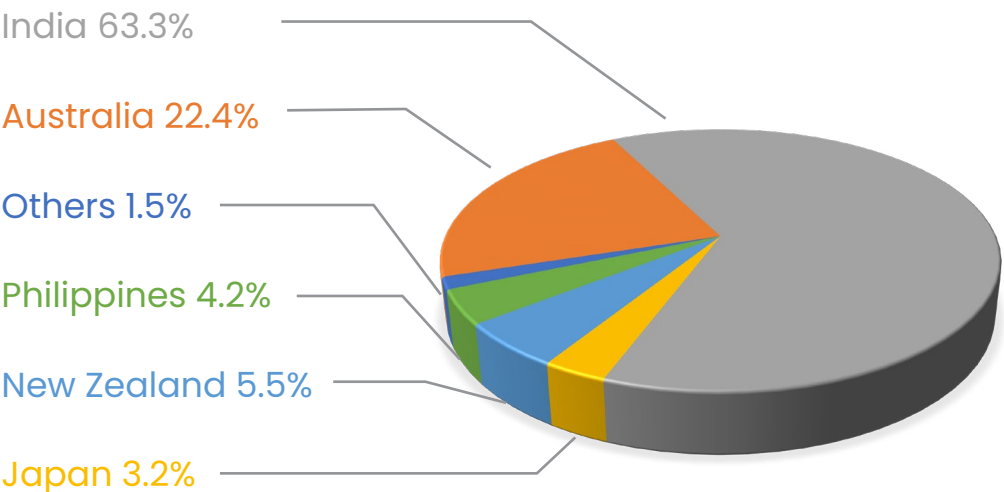
ABC iview | SBS On Demand
10 play | Pluto TV | Fetch TV | Banijay
The Roku Channel

Top 5 countries by HOV and ad impressions Q4 2022 (Oct-Dec)

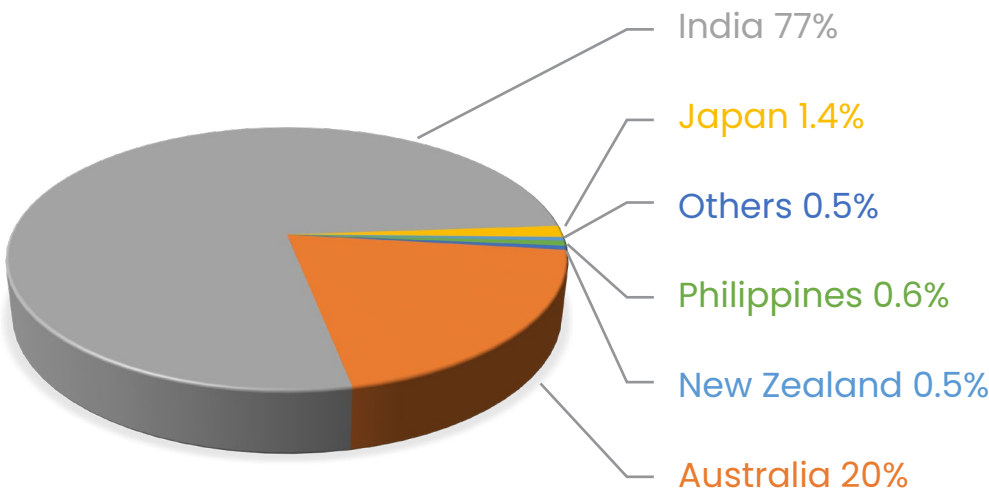
India, Australia, New Zealand, the Philippines, and Japan emerged as the top countries in terms of hours of viewing and ad impressions.

In terms of hours of viewing, India tops the list with a 63.3% overall growth in Q4 2022. Australia takes second place at 22.4%, New Zealand at 5.5%, the Philippines at 4.2%, and Japan at 3.2%. Ad impression numbers show a similar story with India emerging at the top with 77%, followed by Australia at 20%. Japan, the Philippines and New Zealand come next in line with 1.4%, 0.6% and 0.5% growth in ad impressions respectively.

by HOV



by ad impressions

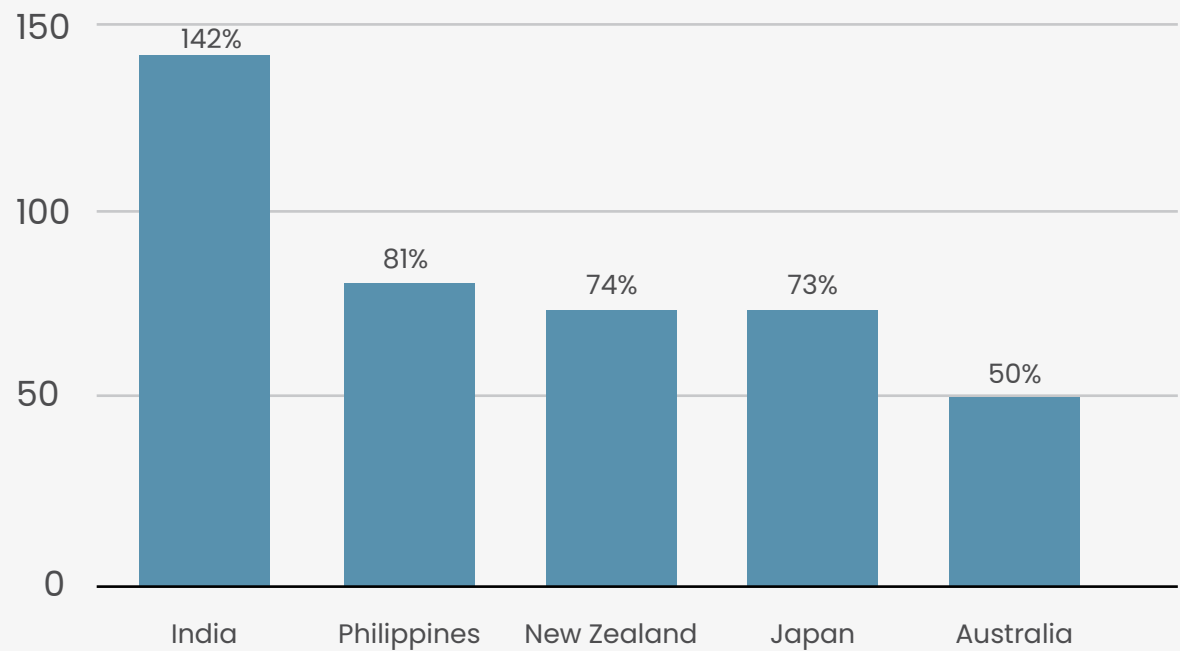


FAST channel deliveries

YoY growth by country

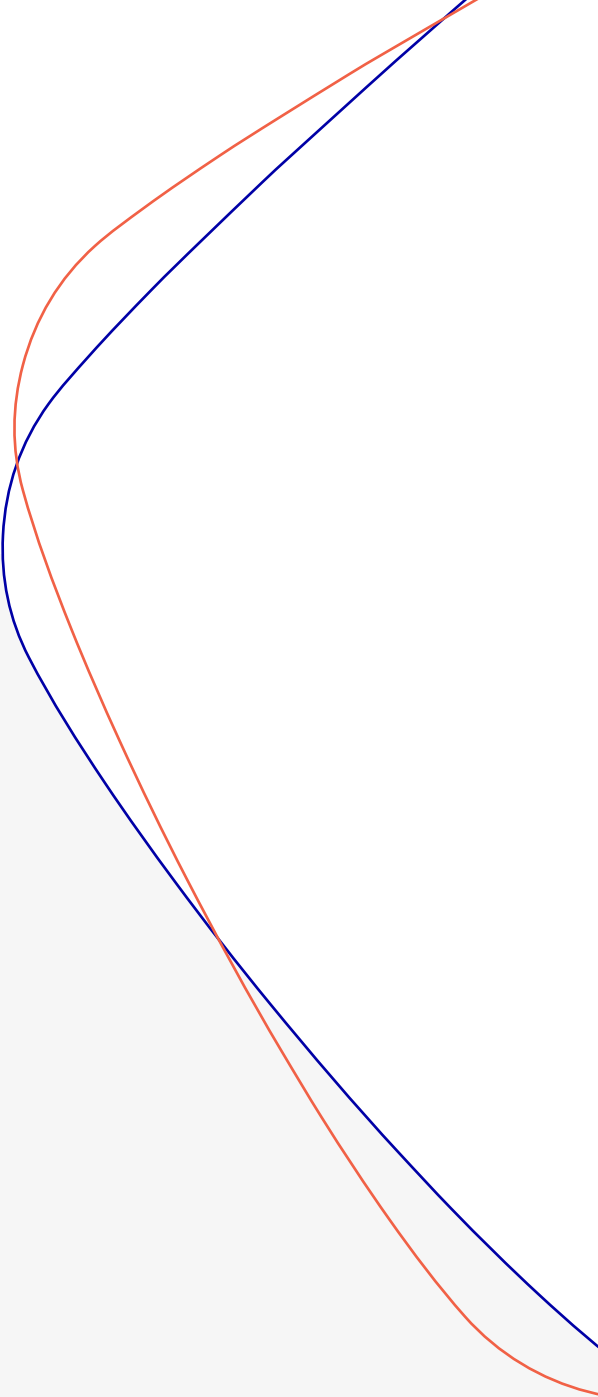
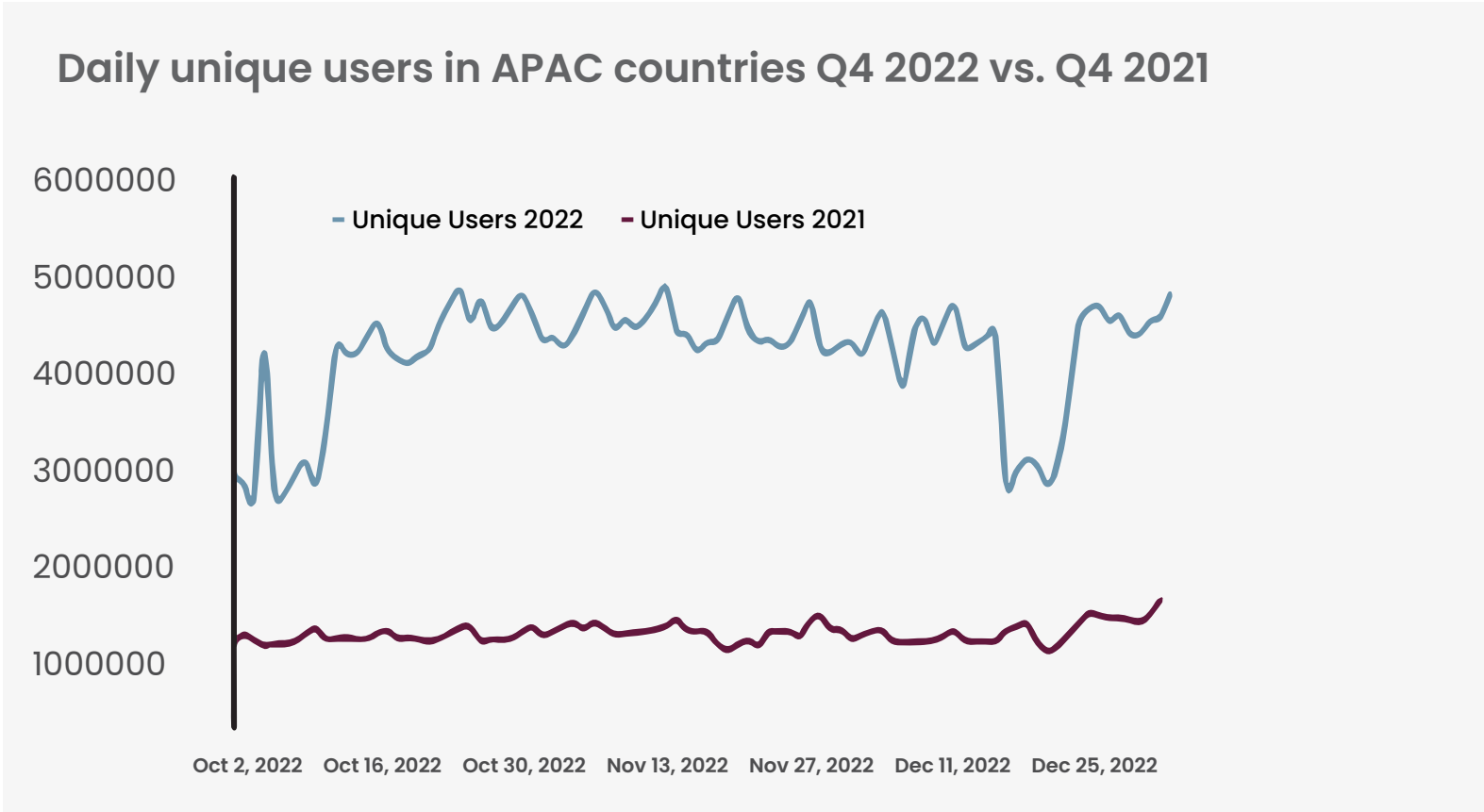
In Q4 2022, India again takes the lead in channel deliveries, exhibiting a 142% YoY growth. Following India is the Philippines at 81%, New Zealand at 74%, Japan at 73%, and Australia at 50%.

Channel count YoY growth Q4



Average session duration vs. daily unique users in **APAC countries Q4 2022 (Oct-Dec)** vs. **Q4 2021 (Oct-Dec)**

Although the average session duration remained relatively consistent between Q4 2021 and Q4 2022, there was a substantial increase of 247% in the number of daily unique users. This significant growth indicates increasing consumers actively seeking FAST options and a somewhat untapped market potential. Now is an opportune time for broadcasters and platforms to explore the region further and expand their offerings.



What are they watching: favorite genres across APAC

The news and movies top the charts with a 933% and 444% Q4 YoY growth in ad impressions and 456% and 1277% Q4 YoY growth in hours of viewing respectively. A further country-wise level analysis reveals that this trend remains consistent for India. Notably, Australia and New Zealand show a different story, with entertainment, movies, and music being their top three genres based on hours of viewing.

Country-wise Top favorite genres

In line with our findings in the previous editions of the FAST report, news has been a consistent favorite across countries. The trend still remains the same for the APAC region. News emerged as the true winner, especially in India, with a 49% spike in ad impressions and a 39% rise in viewership. As Rishi Sunak became the 57th Prime Minister of the United Kingdom on October 25, 2022, the news viewership saw a spike of 46.32% in the APAC region compared to the average viewership for the rest of the month.

Interestingly, entertainment and music are Australia's most loved genres in viewership (13%) and ad impressions (19%), respectively. Entertainment tops the charts in the Philippines with a whopping rise of 80% in viewership and 66% in ad impressions.

Country-wise Top favorite genres

by viewership

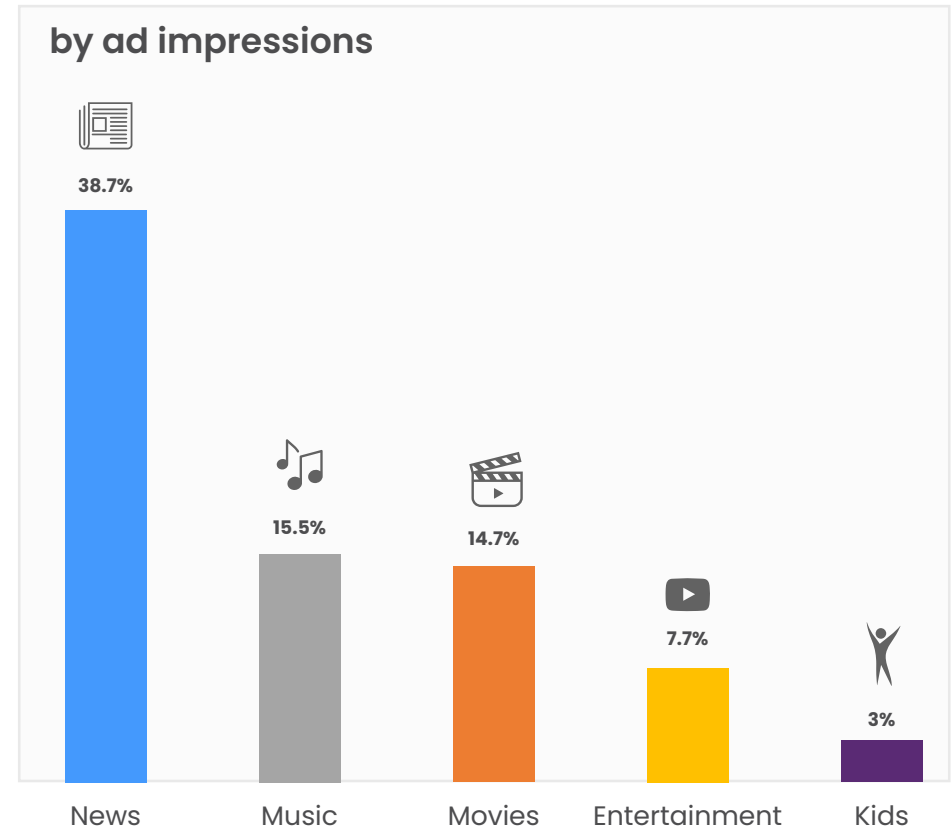
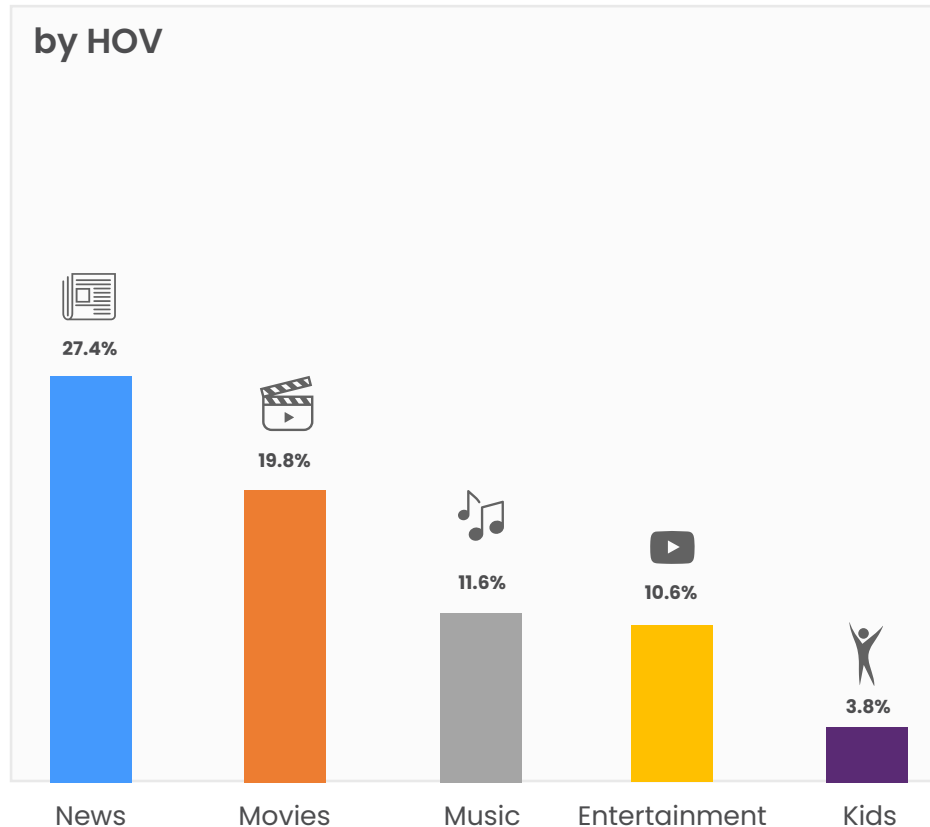
	India:	News (39%)
	Australia:	Entertainment (13%)
	New Zealand:	Movies (18%)
	Philippines:	Entertainment (80%)
	Japan:	Movies (19%)

by ad impressions

	India:	News (49%)
	Australia:	Music (19%)
	New Zealand:	Sci-fi (20%)
	Philippines:	Entertainment (66%)
	Japan:	News (27%)

Top 5 genres in **APAC countries** by **HOV and ad impressions Q4 2022 (Oct-Dec)**

Be it hours of viewing (27.4%) or ad impressions (38.7%), the news is the crowd favorite in the APAC region. The second place is shared by movies for viewership (19.8%) and music for ad impressions (15.5%). Interestingly, they also share the third spot – music for viewership (13%) and movies for ad impressions (14.7%).



Top 3 genres based on HOV and channel count

The Q4 2022 data points out news as one of the fastest-growing genres, with an impressive 456% YoY growth in hours of viewing and a significant 206% rise in channel deliveries. Movies and music are the next in line, closely competing for the second spot. While the former enjoys a 1277% YoY growth in hours of viewing and a 50% increase in channel deliveries, the latter sees a 338% YoY growth in hours of viewing and a 91% increase in channel deliveries.

HOV and channel count YoY growth in Top 5 genres Q4 (Oct-Dec)

Genre	Contribution in overall HOV	HOV YoY Growth Q4	Channel count YoY Growth Q4
News	27.4%	456%	206%
Movies	19.8%	1277%	50%
Music	11.6%	338%	91%
Entertainment	10.6%	185%	70%
Kids	3.8%	88%	24%

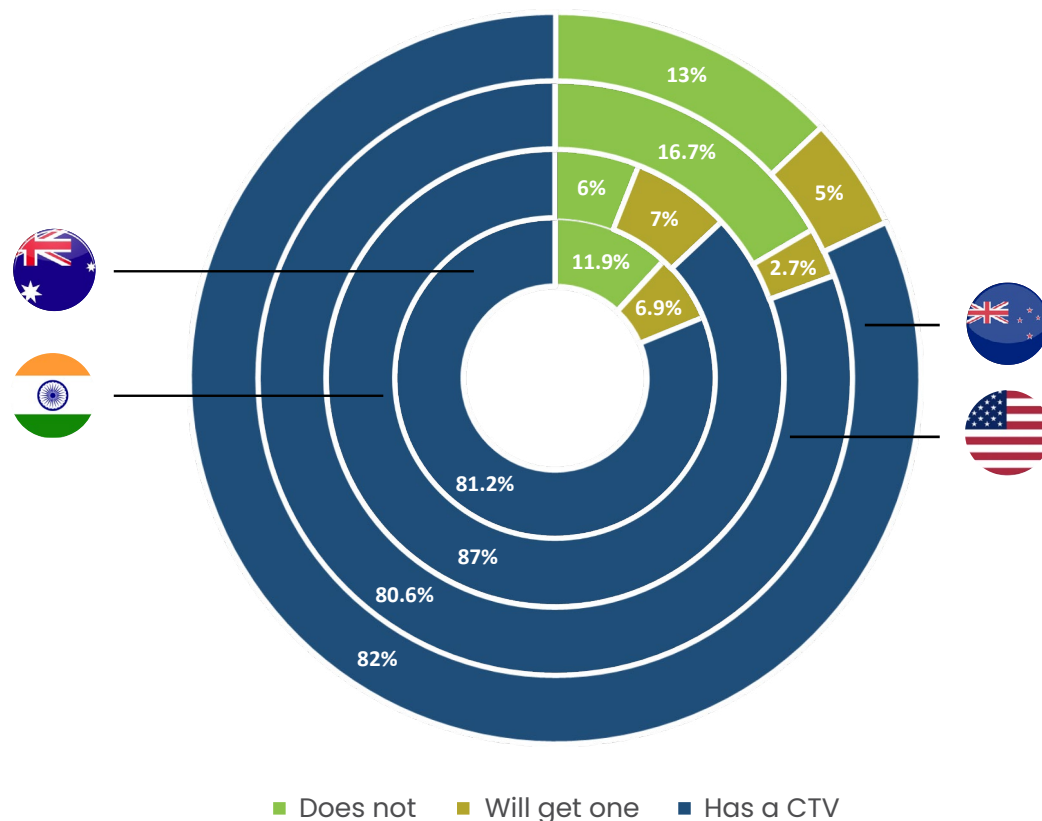
Breaking down the chase: India, New Zealand, and Australia in the FAST lane

In the [previous edition of Amagi's Global FAST Report](#), we did a side-by-side comparison of captured insights from consumer surveys conducted across ~600 US and UK households. This time we focused on the APAC region's three biggest booming CTV countries: India, New Zealand, and Australia. We compared findings from consumer surveys across ~600 households to understand the differences and similarities in consumer attitudes and behaviors.

CTV adoption rates see a steady climb

Before further uncovering the different FAST trends across both countries, we started our analysis by analyzing the CTV adoption rates. The figures for CTV penetration in India, New Zealand, and Australia are pretty similar, at 87%, 82%, and 81.2%, respectively. Interestingly, the CTV penetration rate in these three countries is even higher than in the US, one of the most well-established FAST markets in the world, with a rate of 80.6%.

Percentage of households with a CTV:
India, New Zealand, Australia vs. US

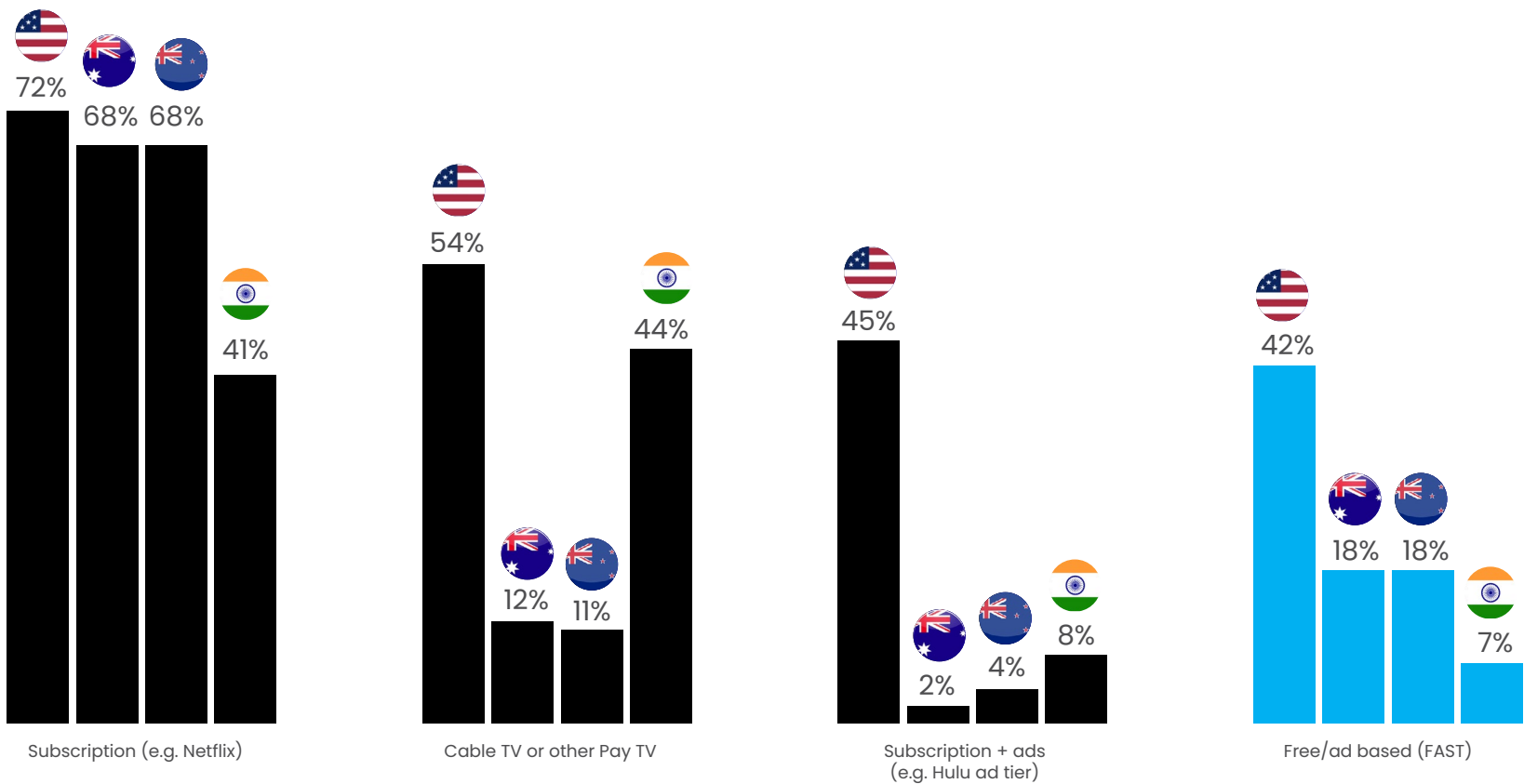


Making headway in the streaming world: **FAST continues to gain steady ground**

Despite 41% of Indian, 68% of Australian, and 68% of New Zealand households favoring Subscription Video On Demand (SVOD), there has been a slow but consistent rise in demand for FAST services. A majority of US households (72%) also show an inclination towards SVOD services.

In terms of FAST adoption rates, Australia and New Zealand are more developed markets, with 18% of households in both countries already using these services. On the contrary, India is still in the initial stages of FAST adoption, with only 8% of households already in the FAST lane. On the contrary, the US remains one of the fastest-growing FAST markets, with a FAST adoption rate of 42%.

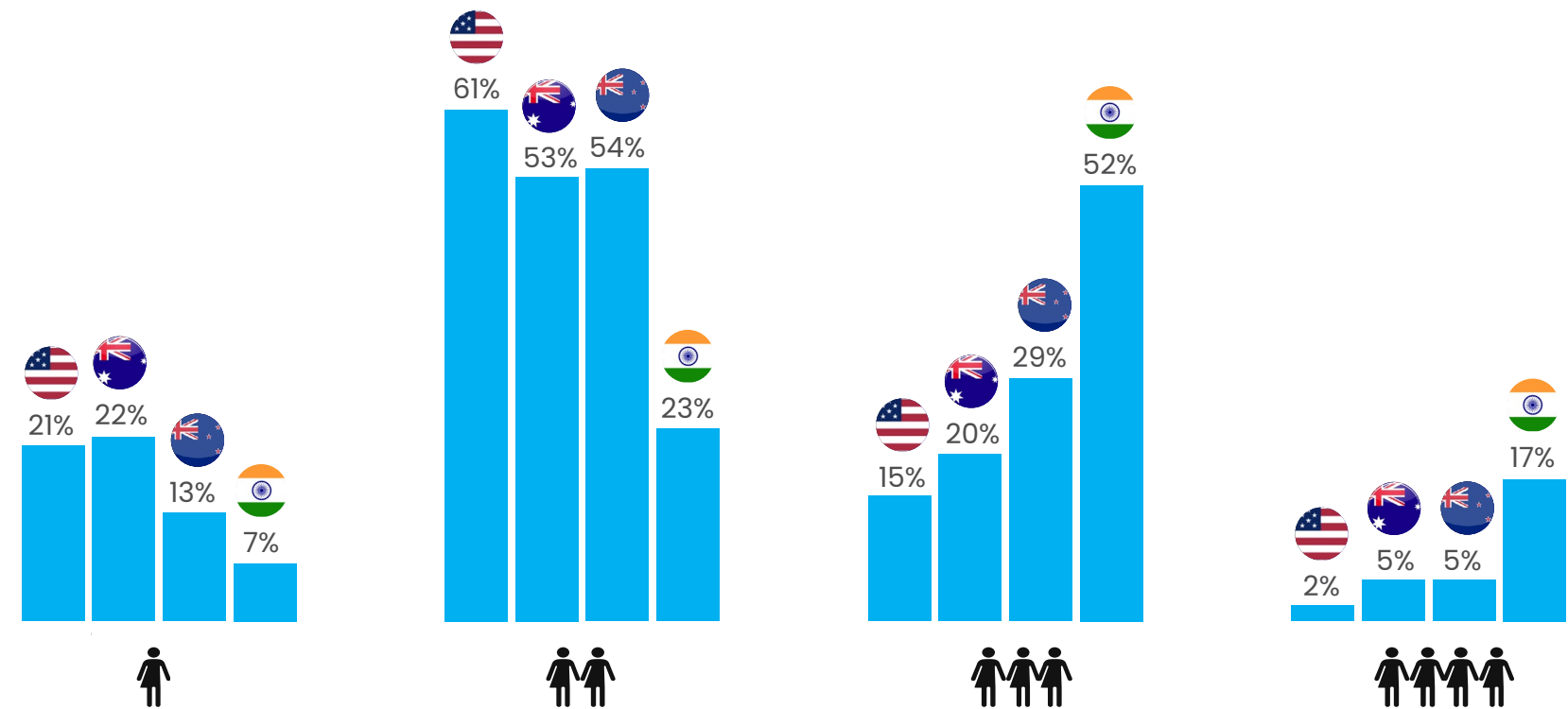
Households with FAST: India, New Zealand & Australia vs. US



India, New Zealand & Australia vs. US: Different TV-watching behaviors

The majority of households in the US, approximately 82%, prefer to watch TV alone or with just one other person. We also observe this trend in Australia and New Zealand, where around 75% and 67% of households prefer to watch TV alone or with one other person. On the contrary, Indian households generally prefer to watch TV with more people, as around 92% of them opt to watch TV in groups of two, three, or four individuals.

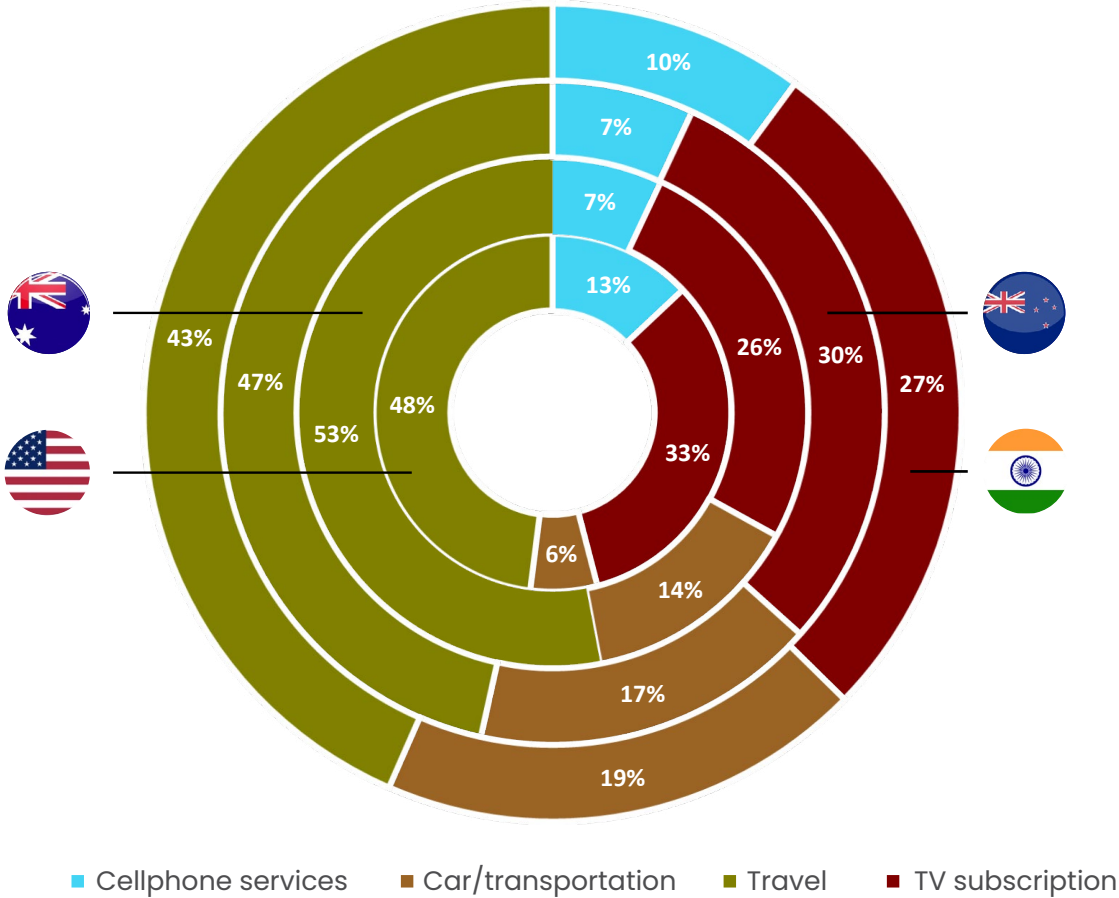
India, New Zealand & Australia vs. US: Different TV-watching behaviors



Cost-cutting during an economic downturn

We asked consumers in India, New Zealand, and Australia what they would give up first as a cost-cutting measure in an economic downturn. Most individuals in all three countries (43-53%) prioritized cutting travel expenses as the initial measure, considering it the first item on their cost-cutting list. Surrendering paid TV subscriptions would be the next measure on their list, with approximately 26-30% of people considering it. These numbers are consistent with the US, with 48% of households willing to cut down on travel expenses as a first step and 33% ready to surrender paid TV subscriptions as their subsequent measure.

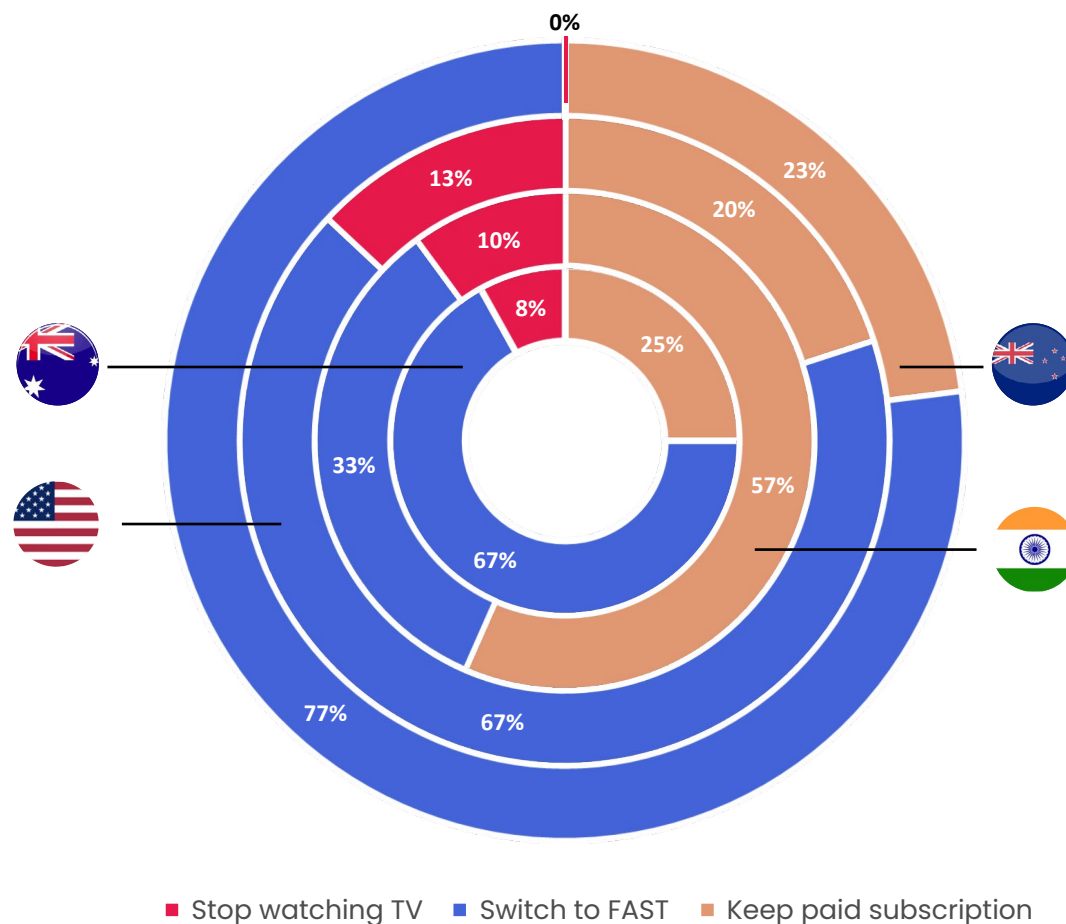
Consumers would cut down on travel & TV subscriptions



TV-viewing habits & recession: what to expect

A significant proportion of US (67%), Australian (67%), and New Zealand (77%) consumers expressed a preference to terminate their paid subscription and transition to FAST services. In contrast, most Indians (56%) were more inclined to retain their paid subscriptions. Despite only 33% of Indian consumers displaying an interest in FAST services, there is still bright potential for increased adoption rates in the future.

Indians prefer paid TV subscriptions, while Kiwis & Aussies root for FAST

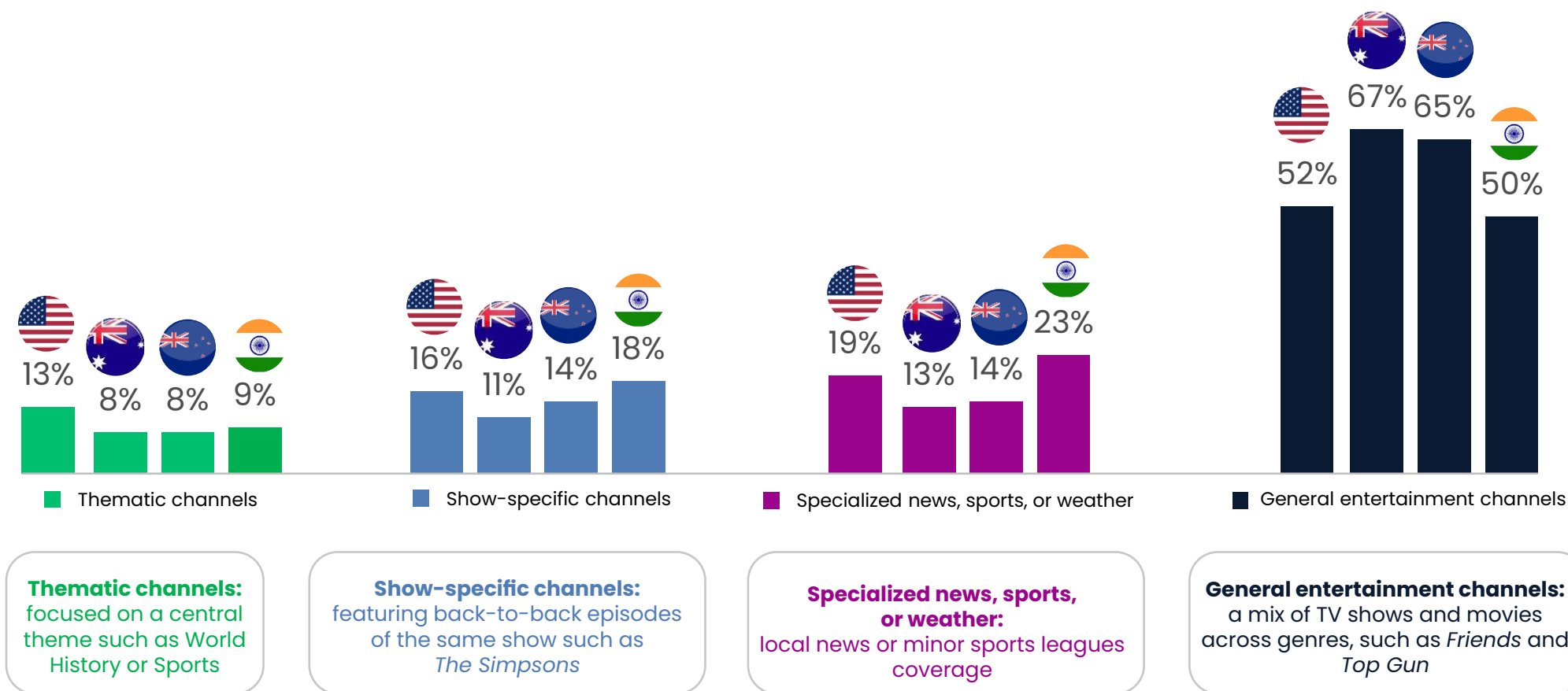


Genres that **steal the show**

Further, to understand audiences' likes and dislikes, we asked them what kind of channels they enjoyed and would like to see more of. While usage data from Amagi ANALYTICS hints at news being the most popular genre in India, entertainment and music being the crowd favorites in Australia, and sci-fi and lifestyle as the top choices in New Zealand, our consumer survey paints a different picture.

Despite many differences in how Indian, New Zealand, and Australian households consume FAST, one thing that turned out to be a common frontrunner was their favorite genre. All three markets show a significant inclination towards general entertainment, thus making it the showstopper in the Indian, New Zealand, and Australian FAST space.

FAST & Genre: What viewers want to watch



Key takeaway

FAST in India, New Zealand, and Australia: A rapidly evolving storyline to watch out for

After analyzing reports from industry experts, conducting consumer surveys, and examining our real-time data from Amagi ANALYTICS, it is evident that FAST is beginning to gain traction in the APAC region, particularly in India, New Zealand, and Australia. With the rise of CTVs, consumers are reassessing their streaming choices and increasingly are favoring cord-cutting. This shift in consumer behavior is expected to continue, making India, New Zealand, and Australia ideal markets for FAST to thrive.

We will be back with more action-packed insights on Free Ad-supported Streaming TV and how it fares in the crucial times ahead.

Send in your feedback, questions, and comments to cloudandme@amagi.com.

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Reach out to us at cloudandme@amagi.com to build or bolster your presence across FAST.

Amagi is a next-gen media tech company that provides cloud broadcast and streaming TV solutions to TV networks, content owners, and streaming TV platforms. Amagi enables content owners to launch, distribute and monetize live, linear channels on Free-Ad-Supported Streaming TV and SVOD platforms. Amagi also offers 24x7 cloud-managed services bringing simplicity, advanced automation, and transparency to the entire broadcast operations for traditional TV networks. Amagi delivers 700+ channels with deployments in over 40 countries. Amagi has a presence in New York, Los Angeles, London, Paris, Singapore, Seoul, Melbourne, New Delhi,

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