

Leading through the Media Landscape in APAC

A look back at 2022 and what lies
ahead for the media industry in 2023



Introduction

2022 was an eventful year for everyone, with most people still recovering from the global pandemic and attempting to go back to living like their previous lifestyles. Adding to the pressure, the threat of global recession and economic downturn are also looming in the horizon. With these major events happening across the world, how have consumers reacted in the media space?

YouGov's Global Media Whitepaper 2022 explored the way global consumers adjusted their engagement with information and entertainment in these changing times, and how are they likely to evolve their media consumption patterns.

In this report, we uncover deeper insights on the media behaviour of consumers that will enable you to better navigate the complex and diverse media landscape in APAC markets. Future marketers and advertisers can benefit from knowing which media activities consumers intend to continue engaging in and which are the ones they anticipate engaging in more of.

This report combines recent YouGov research in 5 markets in APAC, covering Australia, Hong Kong, Indonesia, Singapore, and Thailand. YouGov syndicated Profiles data with YouGov Custom Research and YouGov RealTime were used in this study.



The Global Media Landscape – past and future outlook

Annual media consumption penetrations remain high and digital media activities continue to dominate the market, with websites/apps registering the highest media penetration rate.

Unsurprisingly, more than 9 in 10 APAC consumers report having visited websites/apps in the last 12

months and similar proportion intend to continue this activity in the next 12 months. In addition, more than 9 in 10 have also interacted with social media in the previous 12 months, and a similar proportion are likely to use social media in the coming 12 months.

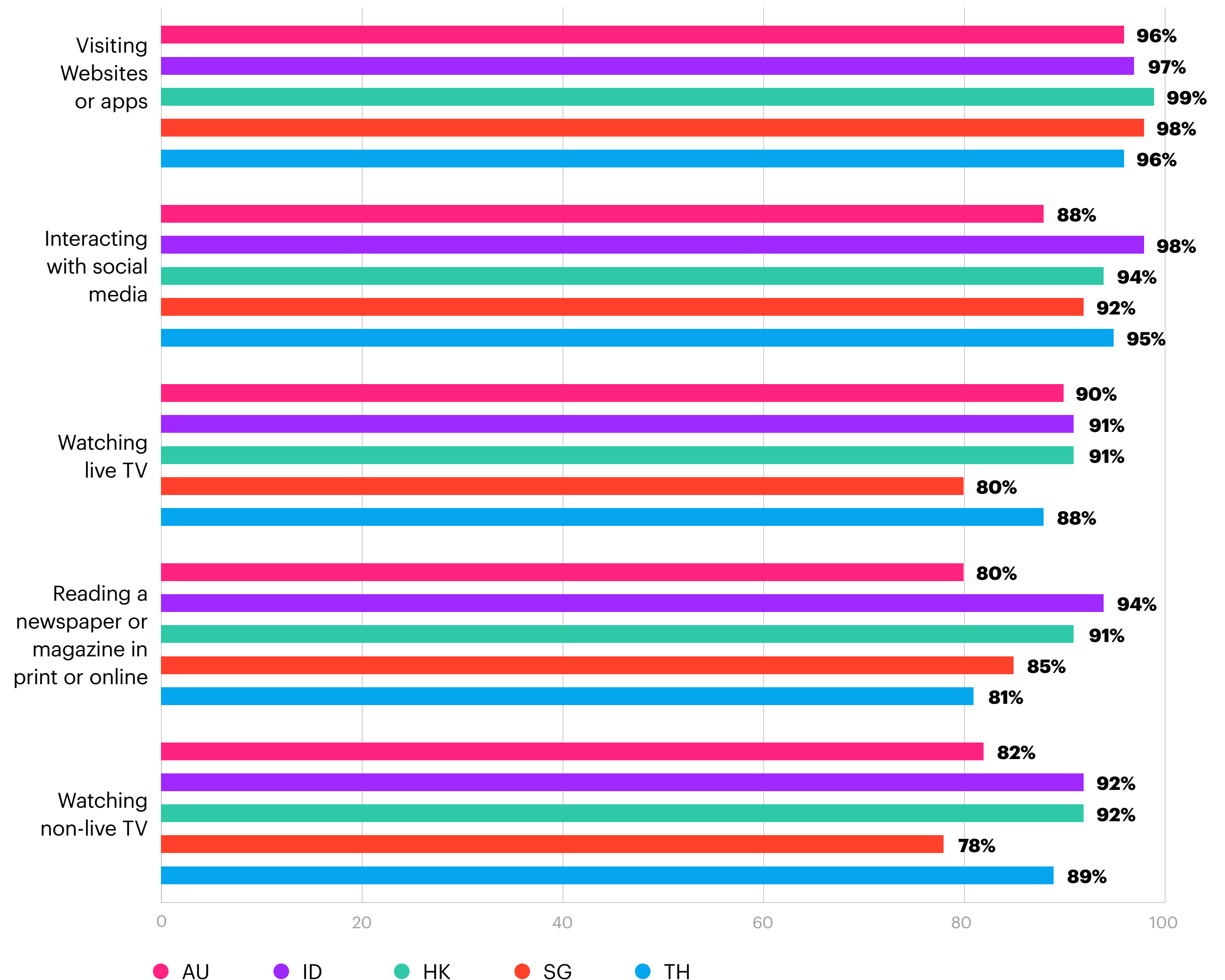


Annual media consumption penetration (past 12 months and next 12 months)

Despite the rise of popularity of video streaming platforms like Netflix and Disney+, video streaming is not as popular as traditional media such as TV and newspapers, and it comes in as the 6th most popular media activity.

In APAC, listening to podcasts is the least popular activity compared to the rest of the media activities – with slightly more than 6 in 10 consumers having done this activity in the past 6 months. This trend will continue for the next 12 months with a similar proportion. However, **85%** of Indonesian consumers will listen to podcasts in the next 12 months, well above the global average of **61%**. While in Singapore, research shows that only half (**51%**) are planning to consider listening to podcasts in the next 12 months.

Top 5 media activities by country (Total penetration)



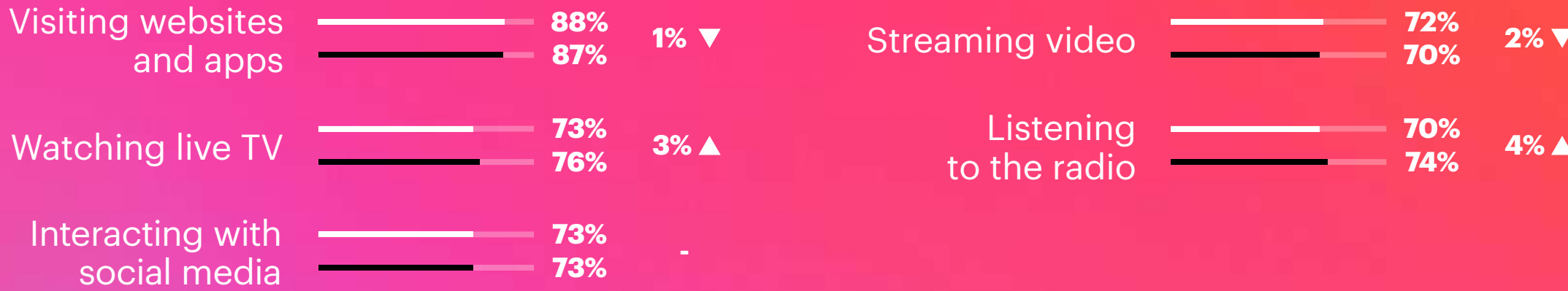
Breakdown by country (about the same, slightly more and much more)

Top 5 media activities in the past and next 12 months

● Past 12 months ● Next 12 months ▲▼ % change

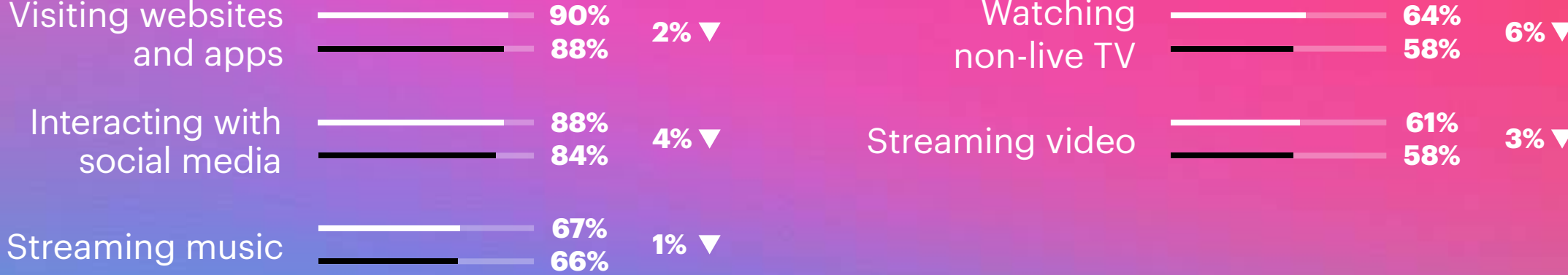
Australia

There is increased interest in watching live TV as well as the radio as more Australians are planning to maintain or increase their consumption in these areas in the next 12 months. Visiting websites and apps continue to be the top activity in the country.



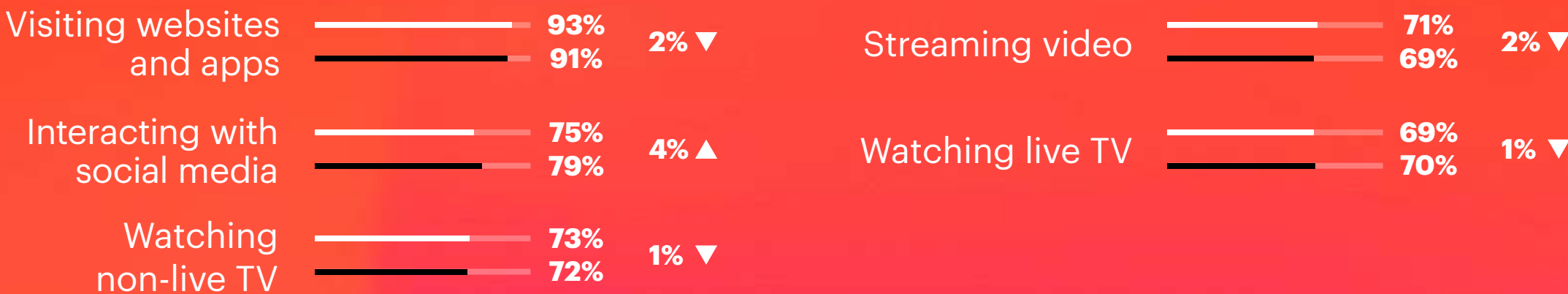
Indonesia

There is decreased interest in all top media activities as less Indonesians are planning to maintain or increase their media consumption with non-live TV having the largest decrease (6%).



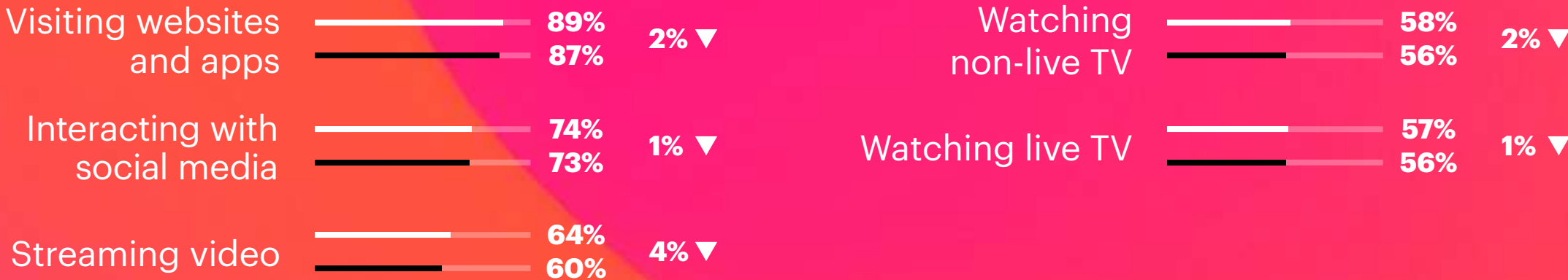
Hong Kong

There is a general slight decrease in interest in top activities except for social media where there is a 4% increase.



Singapore

There is a general decrease in interest in media activities in the next 12 months. Streaming video has recorded the largest decrease in the top 5 media activities in Singapore.



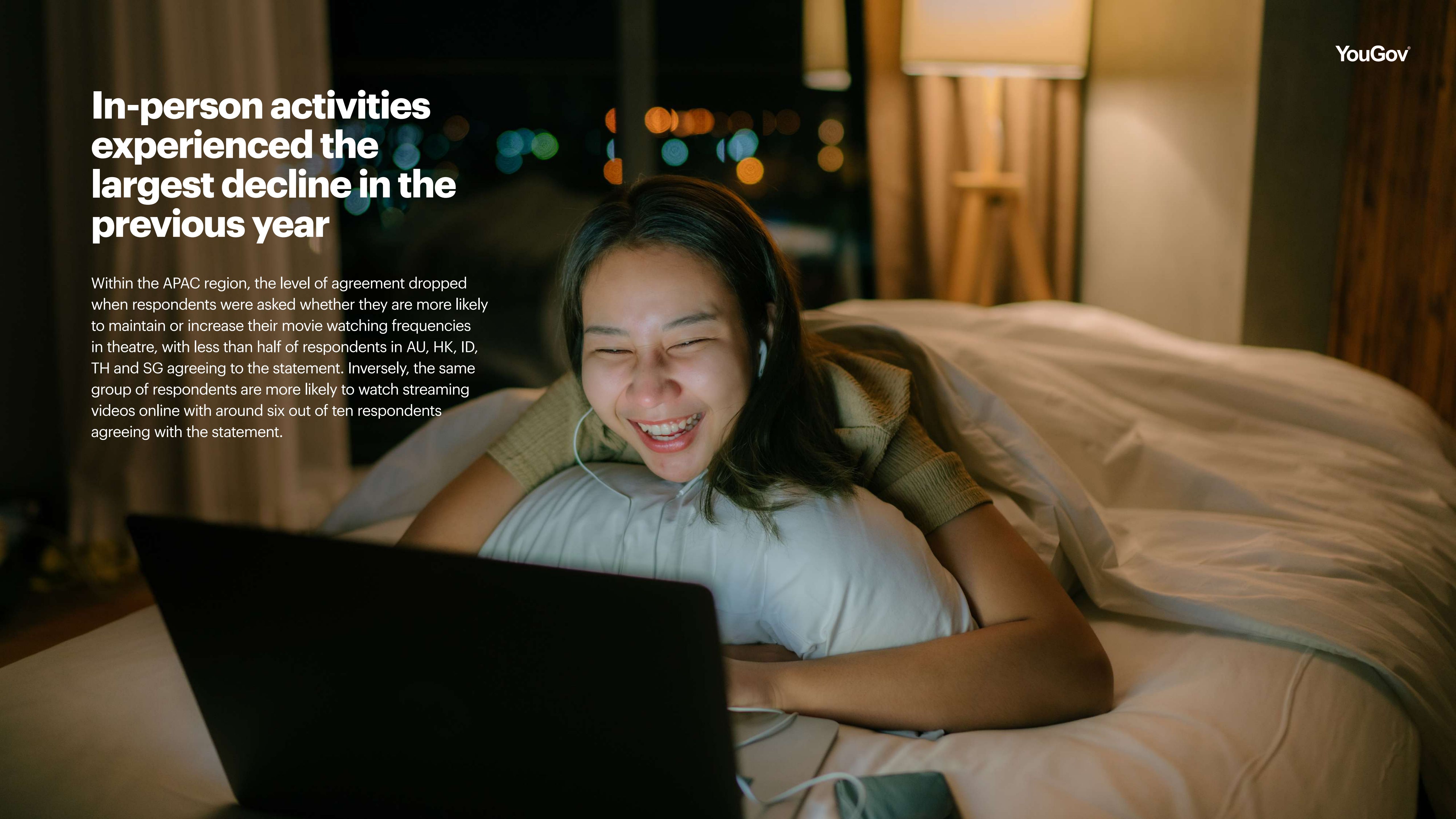
Thailand

The top activity of visiting websites and apps have recorded the largest decrease of 4% while streaming video is the rising media activity in Thailand with an increase in interest of 7%.



In-person activities experienced the largest decline in the previous year

Within the APAC region, the level of agreement dropped when respondents were asked whether they are more likely to maintain or increase their movie watching frequencies in theatre, with less than half of respondents in AU, HK, ID, TH and SG agreeing to the statement. Inversely, the same group of respondents are more likely to watch streaming videos online with around six out of ten respondents agreeing with the statement.



Stickiness and Growth Drivers in APAC markets

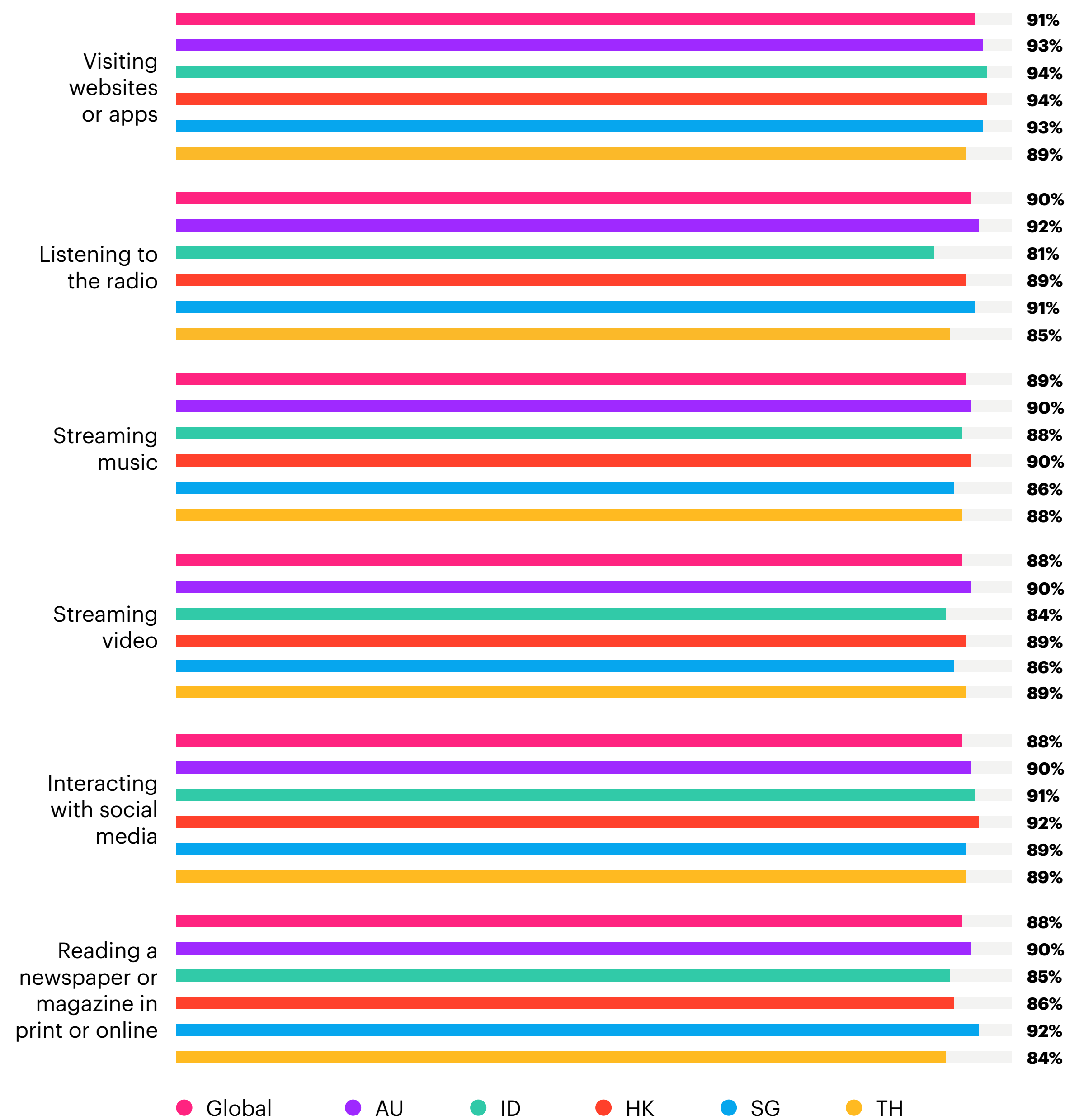
Stickiness: Those who claim to have maintained or increased their consumption of each media type in the last 12 months, and are likely to maintain or consume more in the next 12 months.

Understanding which media consumption patterns are most likely to persist and which are expected to increase among current consumers is crucial for marketers and advertisers as media behaviour continues to evolve. Our stickiness and growth driver metrics utilises data from YouGov research conducted in APAC to determine the percentage of consumers who are likely to persist with their current media habits.



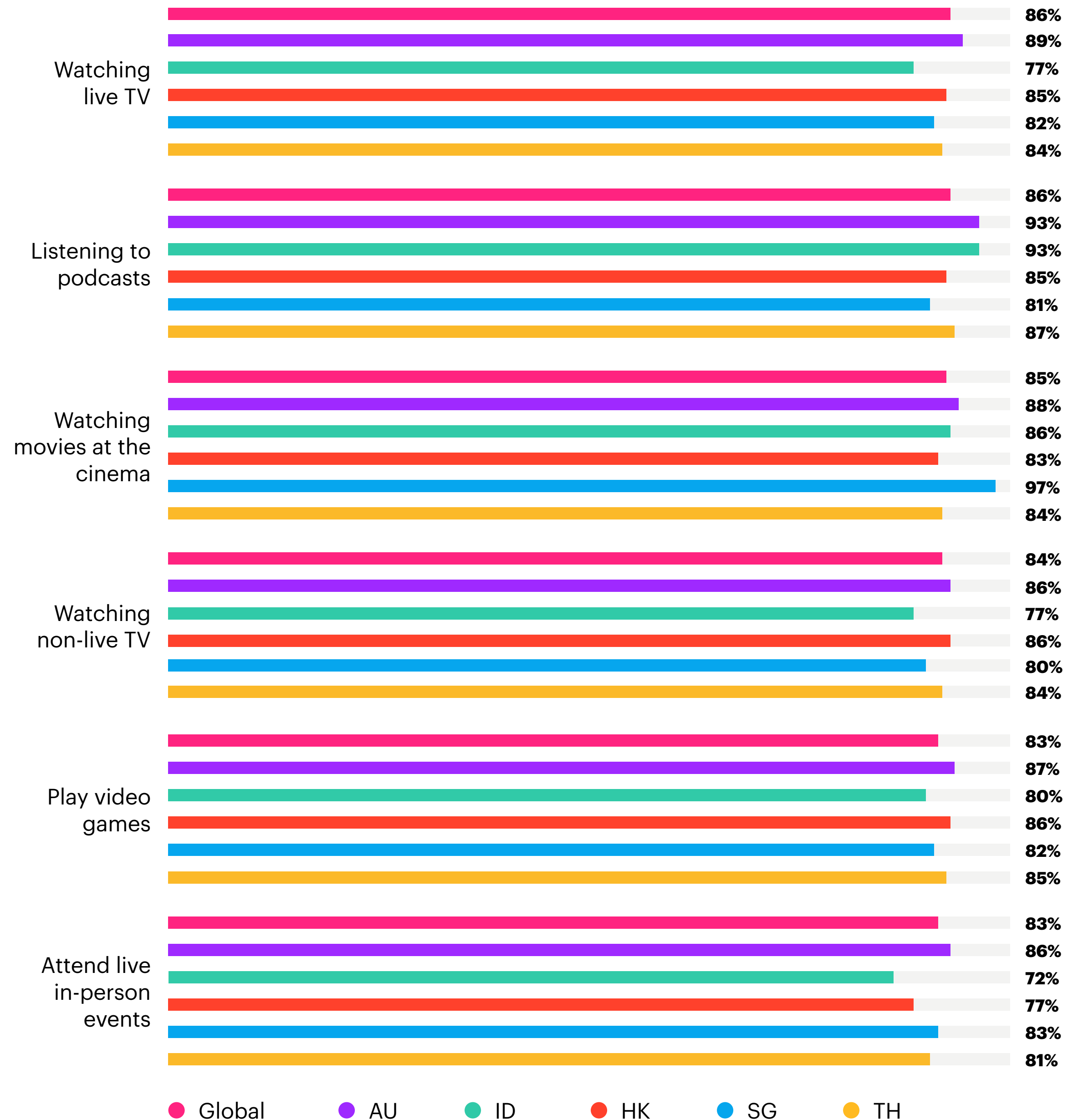
Stickiness of media activities in APAC

Visiting apps and websites will remain to be the top media activities with the highest stickiness score as consistently 9 out of 10 consumers in each market are planning to do so. Our research also shows that traditional media still play a role in consumer’s everyday life as around 8 out of 10 consumers are planning to watch live TV. Interestingly, Singapore stands the highest amongst the other APAC markets as well as globally for having the highest stickiness score of movie-goers.



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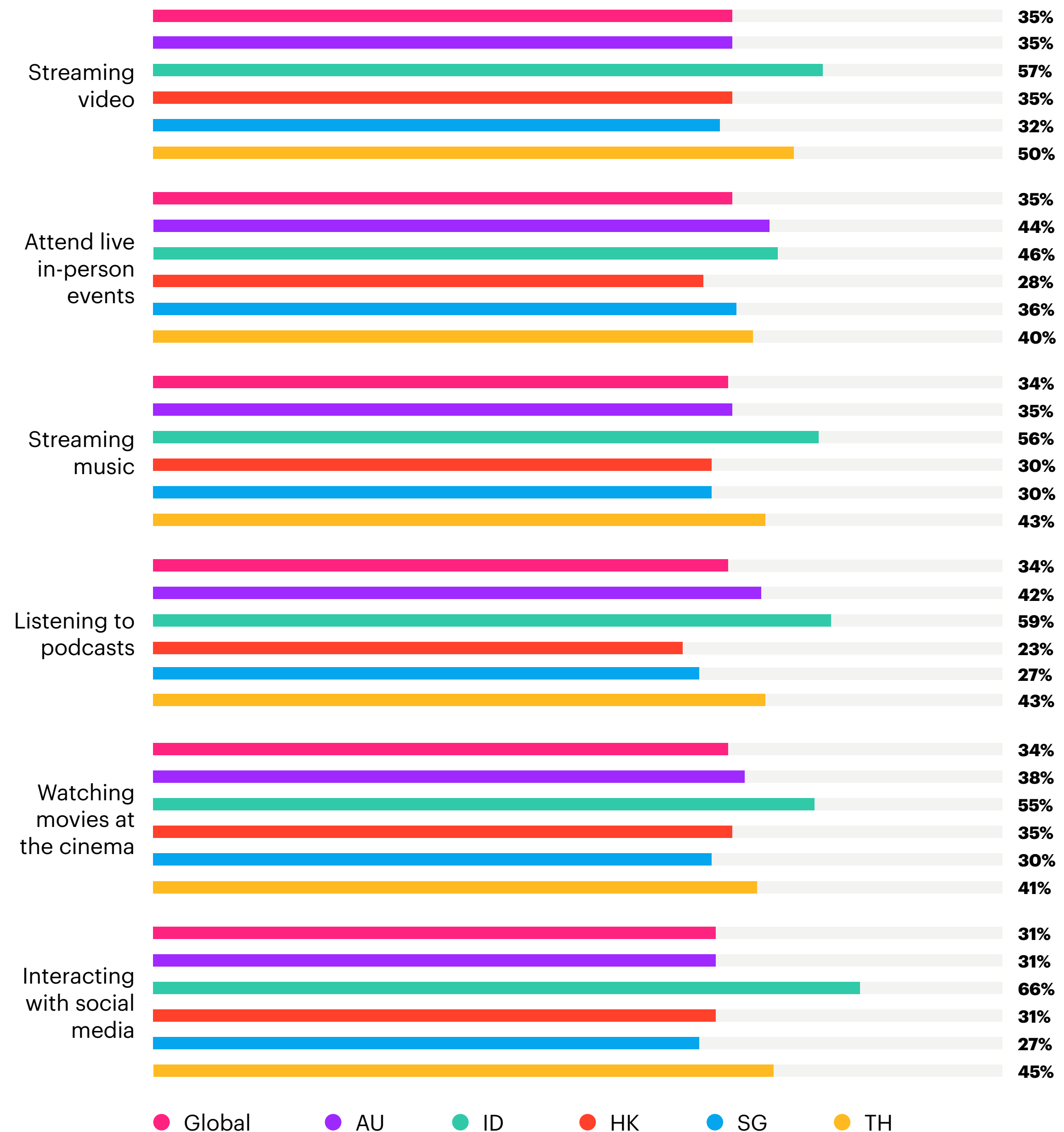
What are the growth drivers in APAC?

Growth Drivers: Those who claim to have maintained or increased their consumption of each media type in the last 12 months and are likely to do more in the next 12 months.

There is a global shift to activities that are more digital, which are the media activities where consumption will increase in the next 12 months?

Indonesia drove the highest digital media consumption among APAC countries with **66%** of consumers more likely to interact with social media, more than twice their APAC counterparts as well as globally. We are also seeing a likely large increase in consumption of streaming music (**56%**), video (**57%**) and podcast (**59%**) consumption in Indonesia. Digital media platforms are seen to be more popular in markets such as Thailand and Indonesia.

In contrast, Singapore is slightly more conservative in their digital media consumption as only **27%** are planning to interact with social media more in the next 12 months, **4%** below the global average. Despite the rise of digital media streaming, Singapore also falls short as compared to the global average as only **32%** are driving streaming video consumption and **30%** are driving streaming music consumption.



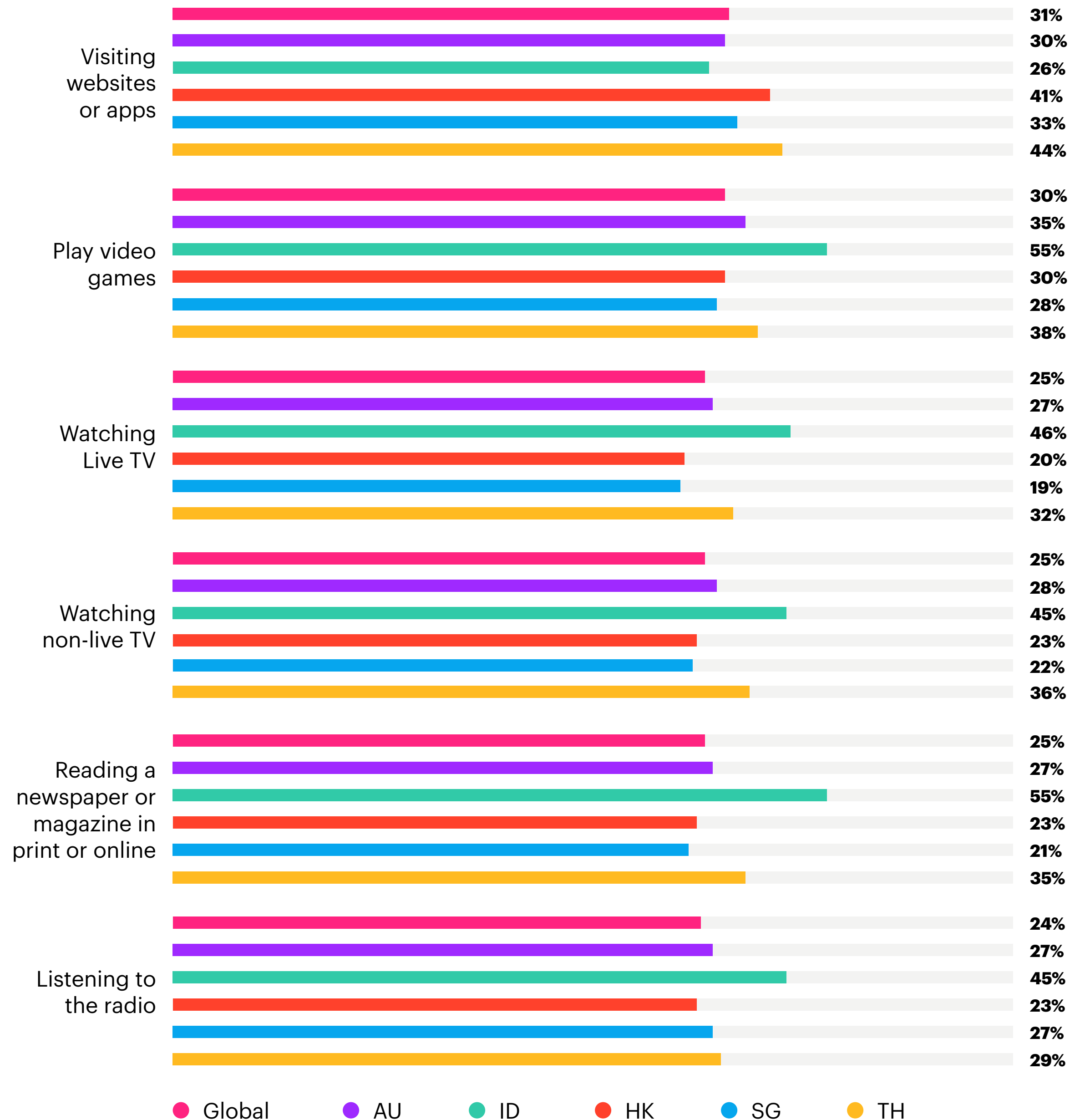
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Zooming in on Gen-Zs

Globally, adults aged 18-24 who have maintained or increased their media consumption of each media type in the last 12 months, are significantly more likely to increase their consumption of all media activities in the coming 12 months compared to older generations.

The rise of social media apps in the region

As expected, Gen-Zs in APAC will be dominating the social media space with almost **60%** in growth driver score, while millennials follow closely behind with a score of around **53%**, compared to just **20-30%** from the older generation (aged 45+). This is especially true for Indonesia which recorded over **73%** in growth driver score for Gen-Zs. While the rest of the regions recorded a much lower growth driver score of below **40%**, the score is still higher in Gen-Zs than any other age groups.

Video streaming activities in the region

Gen-Zs are leading the way to drive growth in video streaming (e.g. Netflix, Disney+, Amazon Prime) in Indonesia and Singapore. The growth scores of **63%** and **42%** in Indonesia and Singapore respectively are higher than the other age groups. The score decreases as the age group gets older. In Australia, consumers aged 35-44 recorded the highest growth score of **46%**, while for Hong Kong, consumers aged 25-34 recorded the highest score of **42%** compared to other age groups.



Insights and Conclusion

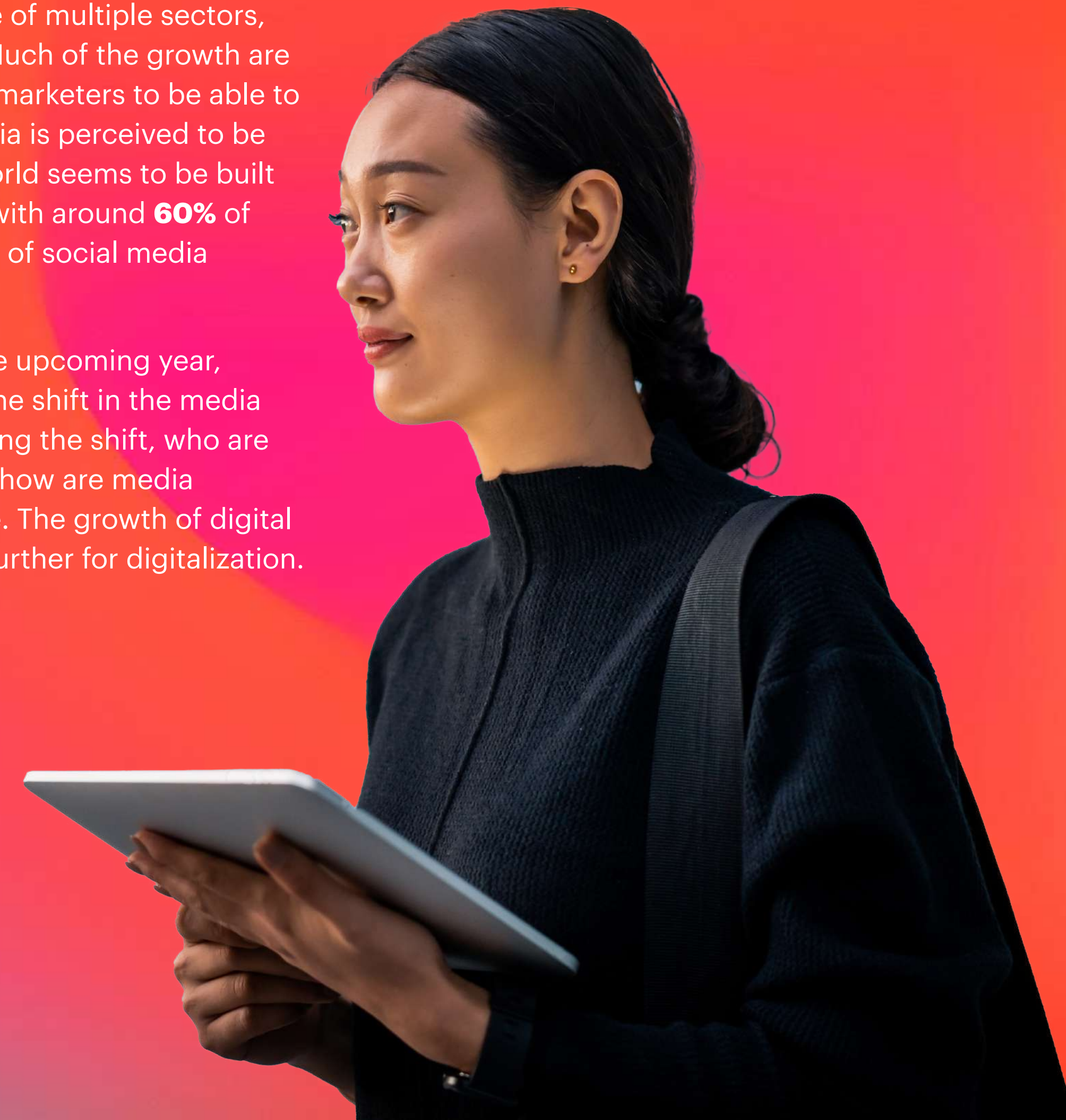
Overall, media penetration rates continue to be high in the APAC markets with digital platforms dominating the top activities such as visiting websites/apps and social media. However, there is a perceived decrease in interest to maintain or increase consumption in various activities, particularly in-person media consumption with the largest decline. With media stickiness remaining high on the average, it is highly likely consumers will gain confidence to return to attending in-person events.

Visiting websites and apps will continue to stick around in all APAC markets. The stickiness of each media activity varies across the markets – podcasts recorded higher stickiness scores in Australia and Indonesia while going to the cinema recorded a higher stickiness score in Singapore. In Hong Kong, interacting with social media tends to be the activity with high stickiness. While in Thailand, all media activities recorded similar scores in the **80%-90%** range.

Having the right strategy to optimise growth in the areas with the highest growth potential is key to your media business. Particularly, understanding what each media platform can offer to attract consumers. While the digital shift caused a decline in media consumption in some traditional activities, certain media types are still closely associated with different generations, with the younger generations preferring digital platforms and uprising platforms – social media, music and video streaming and podcasts.

Gen-Zs are perceived as the driving force of multiple sectors, and within media consumption as well. Much of the growth are driven by the Gen-Zs, it is imperative for marketers to be able to target their needs and wants. Social media is perceived to be synonymous to Gen-Z's needs as their world seems to be built around social media since a young age, with around **60%** of Gen-Zs are planning to increase their use of social media in the next 12 months.

With many major events happening in the upcoming year, it is extremely important to understand the shift in the media consumption - what are the factors causing the shift, who are the most affected and more importantly, how are media businesses going to adapt to this change. The growth of digital media is inevitable as the world pushes further for digitalization.



Methodology

The insights in this report are drawn from a recent global Custom survey on the Global media sector, specifically past media consumption patterns and the future global media landscape, covering **18** global markets of more than **19,000** respondents. Our survey was fielded the week of 10th August to 25th August 2022. Our survey results were further bolstered by YouGov Daily Omnibus research conducted in the US and UK amongst 3301 respondents between 14-15th September 2022 to explore attitudes to sustainability in advertising. The YouGov panel provides a naturally accurate and representative view of the population. Data is adjusted using a mild weighting team using interlocking demographic characteristics—methodology considered advanced in the market research space. For this report series the following population representation was used:

This study is further supplemented by **YouGov Surveys: Serviced** which provides quick survey results from nationally representative or targeted audiences in multiple markets. This study was conducted online on 1-6 December 2022, with an online representative sample of 2,080 adults in Thailand (aged 18+ years), using a questionnaire designed by YouGov. Data figures have been weighted by gender, age, region and monthly household income to be representative of the adult online population in Thailand (18 years or older) and reflect the latest National Statistical Office of Thailand (NSO) population estimates.

Market	Population Sampled Representation	Sample Size
Australia	National Representative – 18+	1,091
Hong Kong	Online Representative – 18+	513
Indonesia	Online Representative – 18+	1,062
Singapore	National Representative – 18+	1,066

Thank you

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