

Relaxation Through Streaming: A Survey on Paid Video-On- Demand (VOD) in Southeast Asia

Centre for Sustainable
Finance Innovation (CSFI)





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Research Team



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Dianna Chang is a Senior Lecturer in Marketing at the Singapore University of Social Sciences (SUSS). Her research interests are consumer behaviour, well-being studies, and sustainability.

Introduction

Relaxation Through Streaming: Paid Video-On-Demand (VOD) Preferences in Southeast Asia



Digital entertainment usage has grown phenomenally in the last decade, driven by global technology adoption and the development of high-quality new content. This trend is evident in Southeast Asia, where people embrace a new digital lifestyle, from entertainment to shopping and payment.

We surveyed 1,500 consumers across five Southeast Asian countries - Singapore, Indonesia, Malaysia, the Philippines, and Thailand - who have paid for digital VOD services in the past year to understand consumer attitudes, usage, trends, and digital wallets' role in paid digital VOD subscriptions. The findings highlight digital VOD's significance in Southeast Asian regular VOD viewers' lives and the differences among countries.

The results provide valuable insights into the preferences and behaviour of digital VOD subscribers in Southeast Asia. They suggest consumers' reliance on digital media and mobile phones for entertainment and the growing usage of digital wallets for digital subscriptions. We present key findings in this summary report. A full report can be downloaded from our website.

This report is part of a series in which we study how digital payment is growing and revolutionizing the payment system in Southeast Asia and China. You may also be interested in the following two reports:

- [A Survey on Trends and Digital Adoption in China's Outbound Tourism 2023](#)
- [The Rise of Paid Online Gaming in Southeast Asia: A Survey of Usage and Trends](#)

Highlights



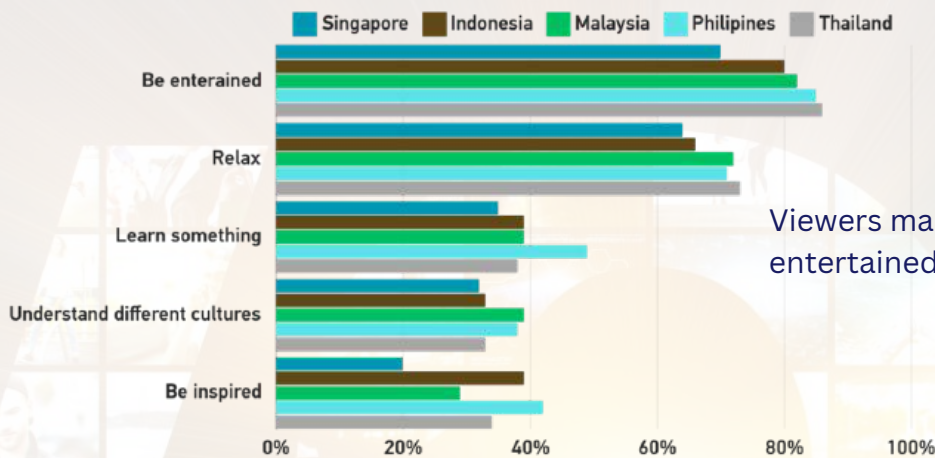
- Regular VOD subscribers spend significant time on VOD, with many watching at least four days a week for two hours or more each session.
- People in their 30s watch VOD most frequently and for the longest duration.
- Smartphones are the preferred devices, especially among viewers in their 20s and Indonesian users, even though most viewing happens at home.
- Viewers seek VOD mainly for entertainment and relaxation.
- They prefer relaxed genres over serious, cognitively demanding content like history and war, with a growing preference for serious content among viewers over 50. Men and women share some genre preferences but also have distinct differences.
- Older consumers especially value the convenience of VOD subscriptions.
- Quality recommendations and content are crucial service differentiators. Reasonable, flexible pricing and high-quality content are key for VOD platforms to win consumer loyalty.
- Nearly 90% of consumers opt for monthly payments to manage finances and plan adjustments.
- Digital wallets have surpassed credit cards as the primary payment method in Indonesia and the Philippines, and consumers across countries appreciate their convenience.

Key Findings

1. The Ubiquitous Pursuit of Entertainment and Relaxation.

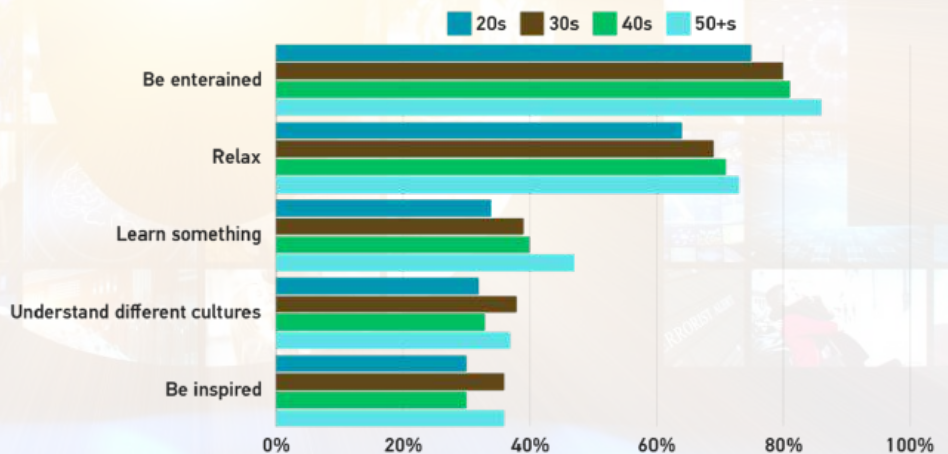
People of all ages and from diverse cultures seek entertainment and relaxation. Their motivations and the types of content they consume reflect a universal desire for leisure and enjoyment.

VOD reason by country

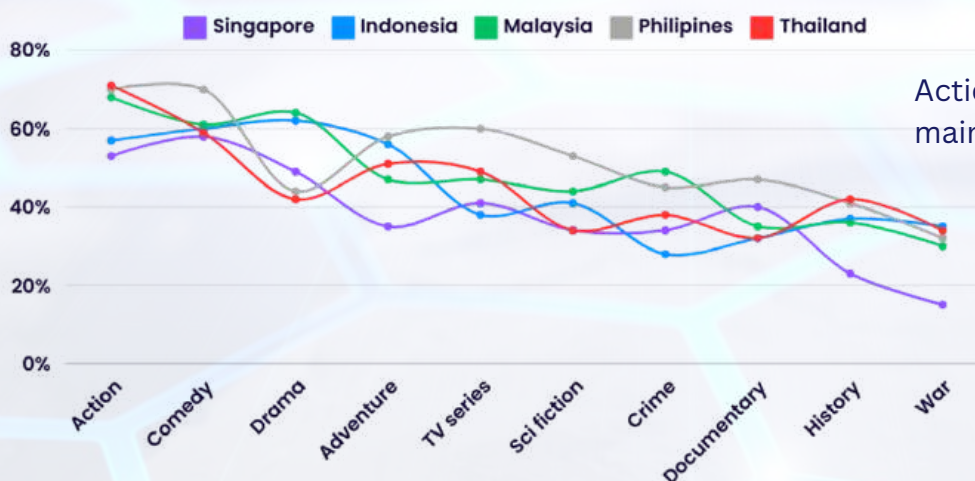


Viewers mainly want to be entertained and relax

VOD reason by age



Favorite genre by country



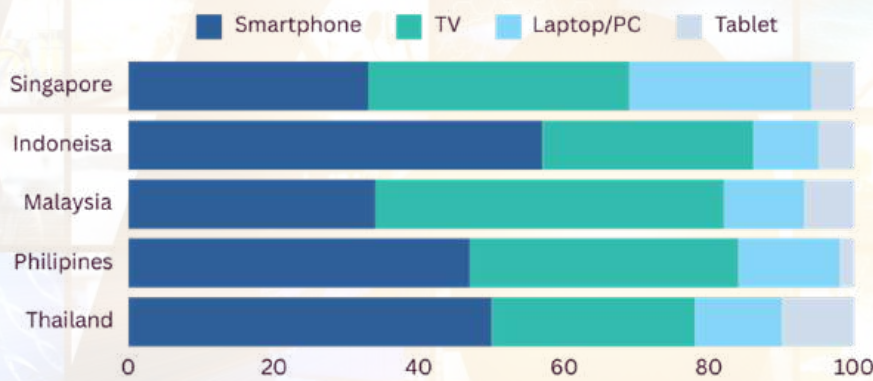
Action, comedy and drama: it's mainly about entertainment!

Key Findings

2. Smartphone Dominance

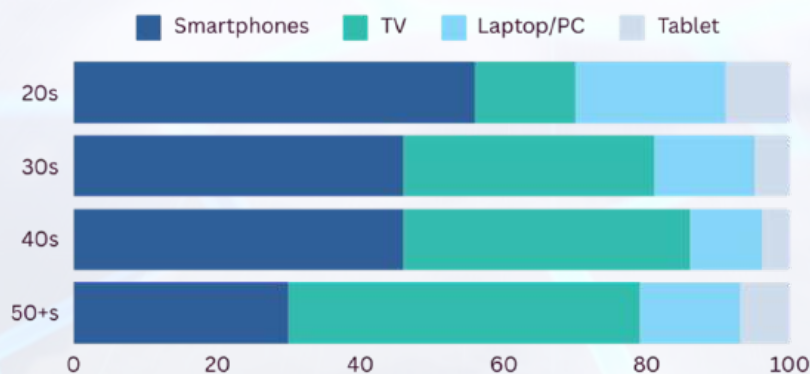
Smartphones are the most popular devices for watching videos, even at home. Despite over 90% of participants typically stream videos at home, smartphone usage is high, particularly among Indonesian (57%), Thai (50%), and Filipino consumers (47%). Contributing factors include shared living spaces and the need for multitasking, making smartphones a convenient choice.

Favourite devices by country



Viewers also expressed enjoyment of “me” time when watching videos, and mobile phones may have given them more privacy. This underscores the significance of smartphones in digital entertainment. Younger viewers prefer smartphones more, while TV usage increases with age.

Favourite devices by age

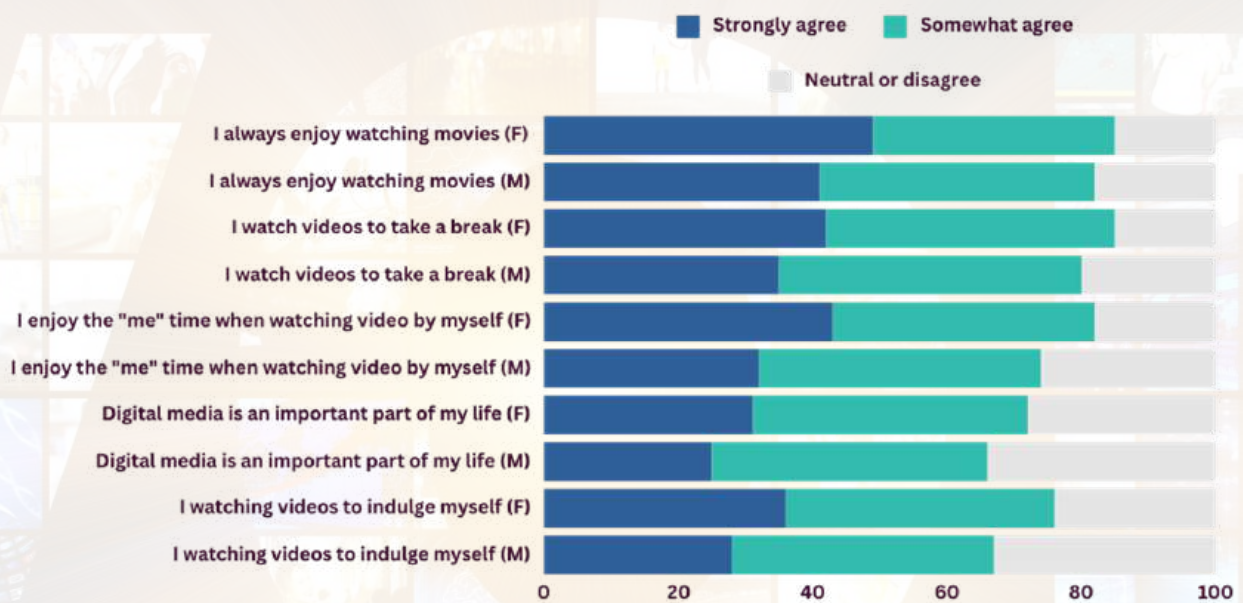


Key Findings

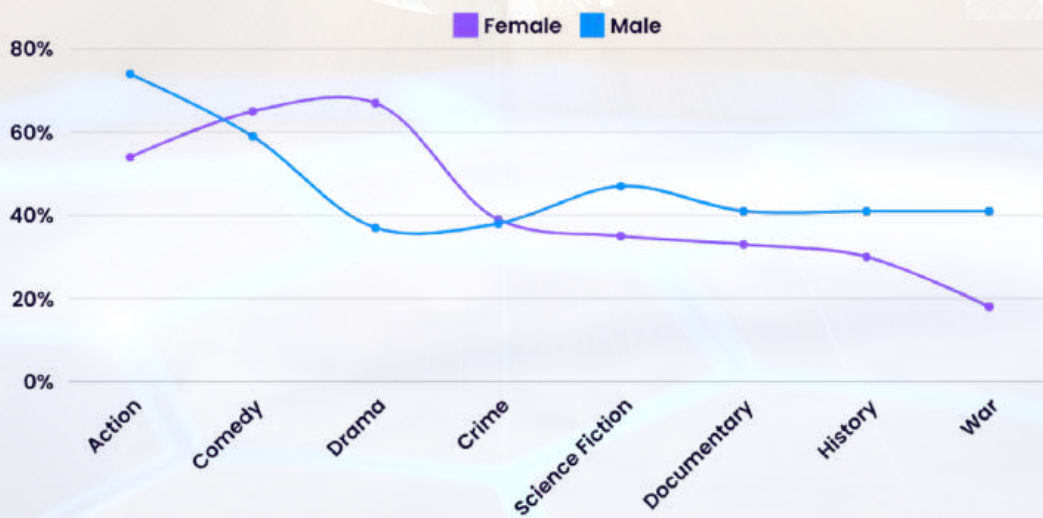
3. Women vs. Men

Women spend more time watching videos than men and express greater enthusiasm than men. Women prefer dramas, while men lean towards action, science fiction, and war movies. However, both genders share similar interests in comedy and crime genres.

Media & life by gender



Favourite genre by gender

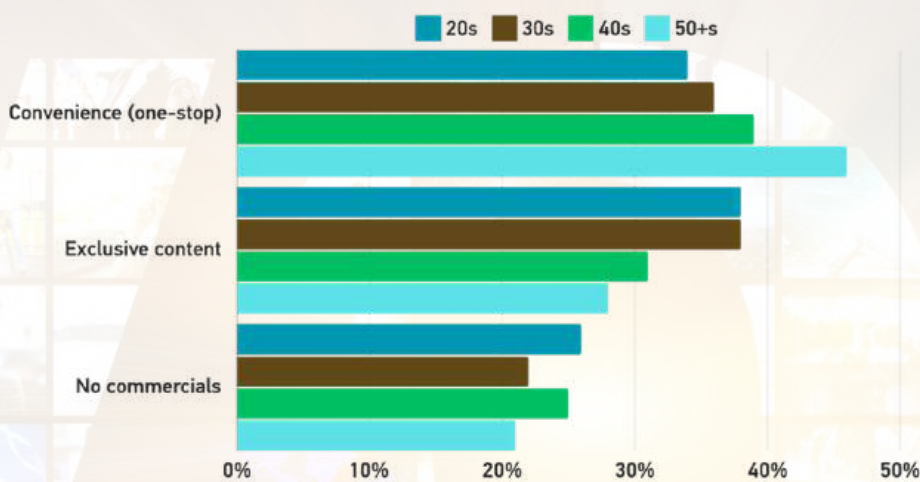


Key Findings

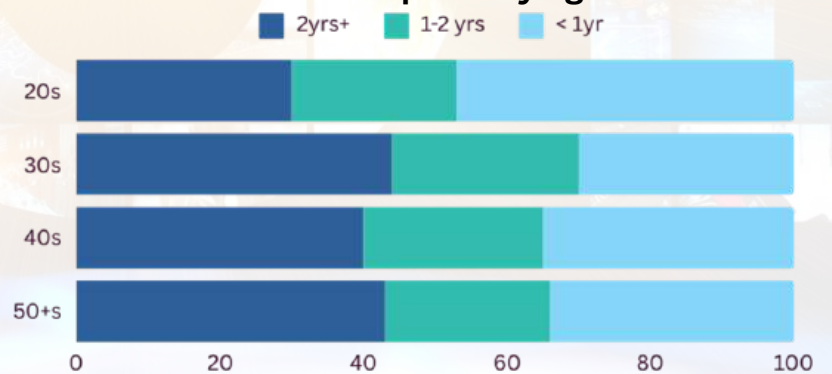
4. Young vs. Old

Younger people are slower to subscribe to paid VOD services, likely due to cost concerns and their ability to find free content. Older viewers, however, value the convenience of digital subscriptions more, tend to subscribe to fewer services (1-2) and show greater loyalty to VOD services with fewer cancellations.

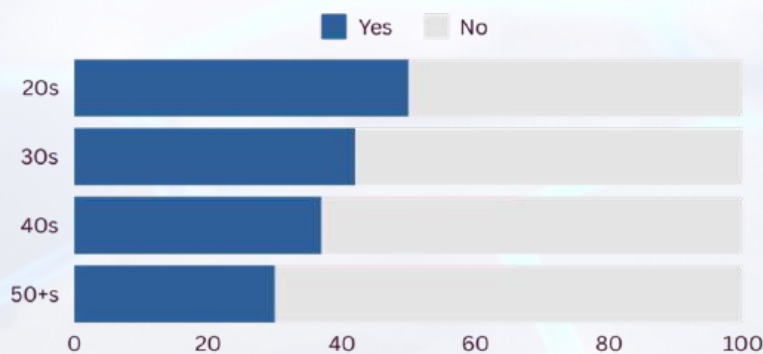
Reason for VOD subscription



VOD subscription by age



Cancellation of VOD subscription by age

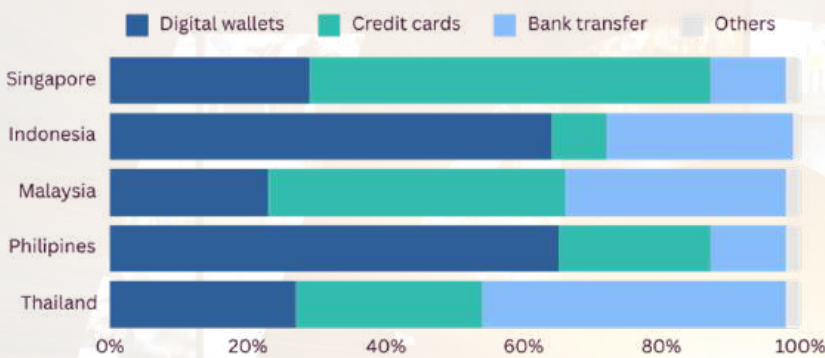


Key findings

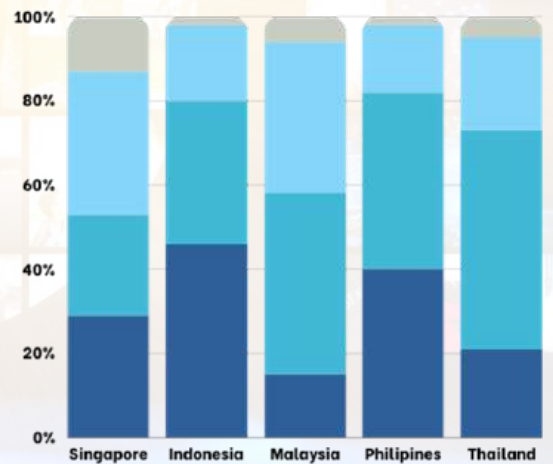
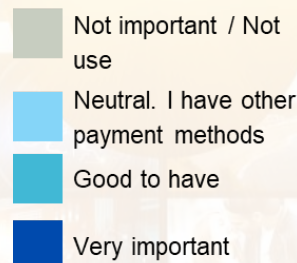
5. Digital Payment on the Rise

Digital wallets have surpassed credit cards as the primary payment method in Indonesia and the Philippines, where bank account and credit card ownership is low. Consumers in surveyed countries value digital wallet payments, expecting them to offer competitive prices, discounts, flexible payment options, enhanced security features, and faster transactions.

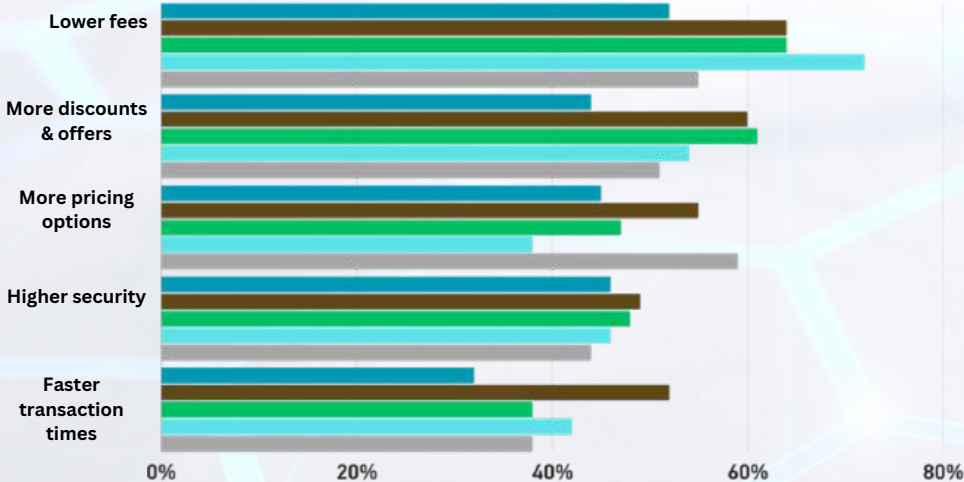
Payment methods by country

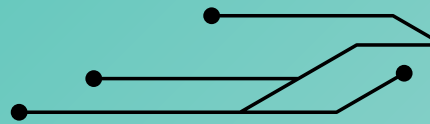


Digital wallets attitude by country



Digital wallet service expectations by country





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The full report is available for download from our centre's website at <https://www.ntu.edu.sg/csfi>.