OTT Video Streaming Services in Thailand

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Content

Thailand's Internet Consumption Overview

- Over 79% of Thailand's population consume the internet for more than 10 hours per day, which is higher than the global average of only 6.58 hours per day.
- Recent top 3 online activities are communication, video/music streaming and search engine.

Internet Users Overview (2021)

Thailand's Population

66.17 million ppl

Internet Users

+2.0%

52 million users

Or 79% of population

Smartphone Connections

+0.9%

93.39 million devices

Internet Usage

10 hr 36 min / day

'Streaming' is still the top 2 most popular online activity in this era, especially during COVID-19 when people mostly spend time at home, thus driving more to watch/listen to online content.

Top 10 Online Content Activities

2021

1. Communication
2. Video/Music Streaming
3. Search Engine
4. Reading News/e-book
5. Shopping
6. Sending Email
7. Online Banking
8. Order Food Delivery
9. Online Studying
10. Online Working

2020

1. Video/Music Streaming
2. Search Engine
3. Communication
4. Sending Email
5. Shopping
6. Reading News/e-book
7. Online Studying
8. Game
9. Online Banking
10. Download Video/Music/Games

Source: ETDA, 2021

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Thailand’s OTT Video Streaming Market: SVOD Market Size & Growth

- The OTT video streaming market in Thailand has had double digit growth in both value and number of users. SVOD is the largest revenue stream for video streaming service providers, with the share of more than 80% out of all revenue models.
- The number of OTT streaming users in Thailand continues to increase, especially SVOD, which has 18% y-o-y growth from 2020 to 2021. The growth of SVOD has been driven by Covid-19 and the increasing internet and smartphone penetration rates.
- The SVOD market is estimated to grow by 12% CAGR from 2021 to 2023 due to rising technological advancements and upcoming new service providers

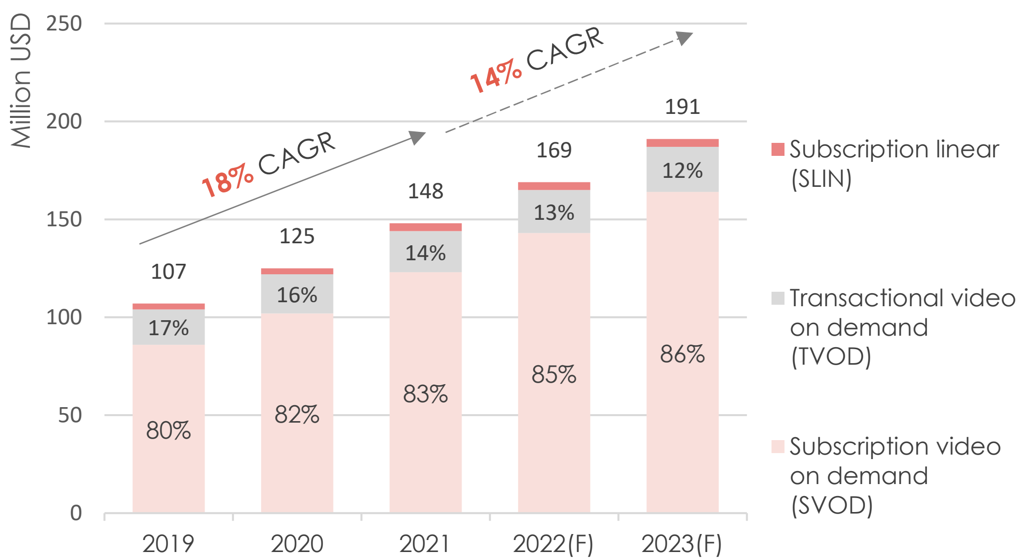
123 million USD

Total Market Value of SVOD in 2021

1.53 million users of SVOD

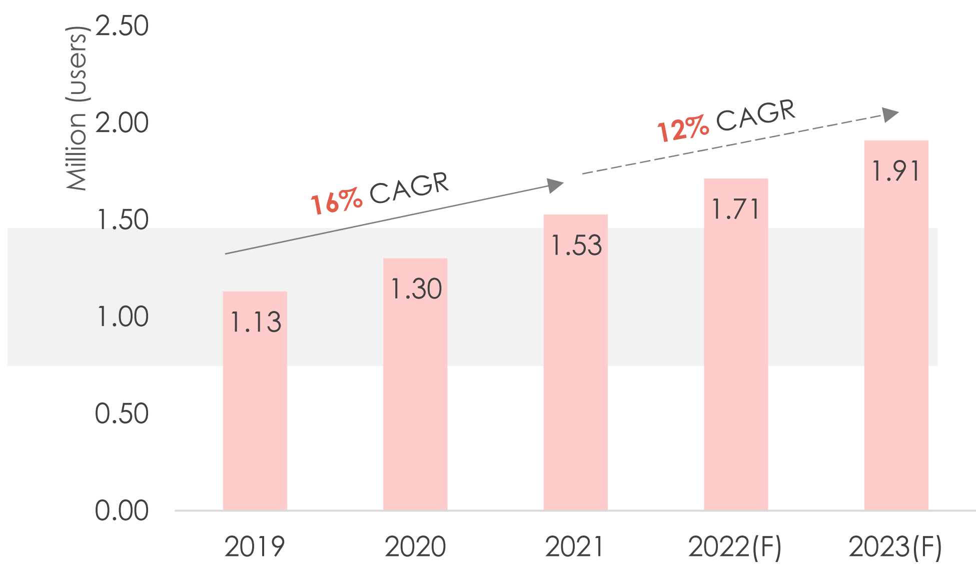
Total Market Volume in 2021

OTT Revenue in Thailand



Source: Ovum Research (2019)
Note: (1) Exclude the revenue from advertising-based video on demand (AVOD) as it is not the revenue derived from the end users (viewers).
(2) Forecast was done in 2019 but revenue is expected to rise due to Covid-19

SVOD Subscribers in Thailand



Source: Ovum Research

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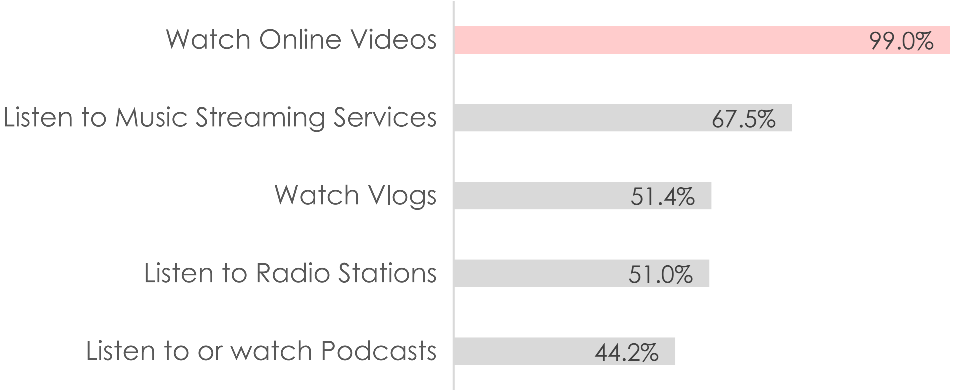
Thailand's OTT Video Streaming Market: Thai Viewer Preferences

- Over 65% of Thai viewers are watching video streaming via smartphones, which are portable and can easily access various content.
- Popular content for Thai viewers are from Korea and the US, with more preferring to watch series rather than movies.

Most Consumed Streaming Activities in Thailand (2021 Q1)

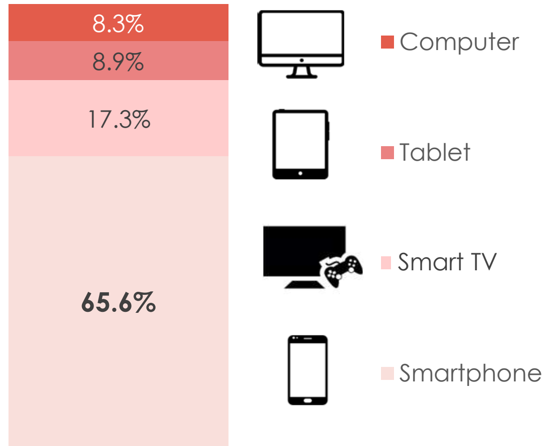


Source: We Are Social

Note: % is the percentage of internet user aged 16-64 who consume each kind of content via the internet each month (multiple answers)

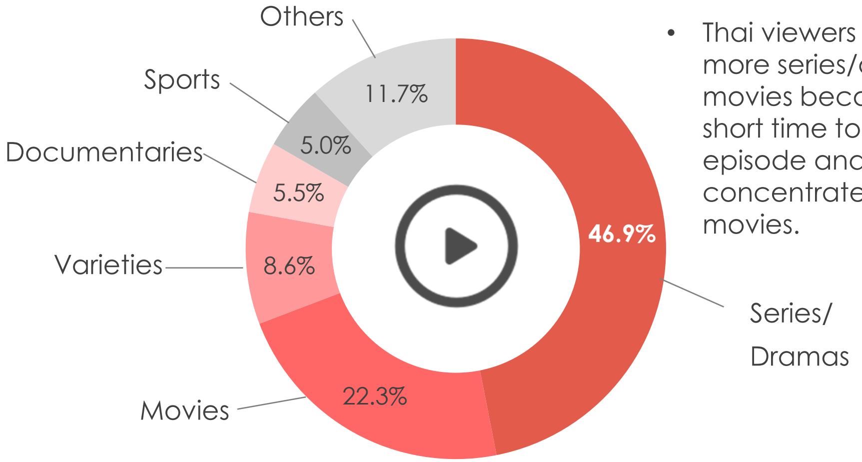
Devices that Thai Viewers Used for Streaming Video (2020)

- Smartphones are the most used devices for watching video streaming because it is able to access the videos anywhere anytime.
- Smart TVs which are able to download streaming applications is another channel that has been used for watch videos due to its big screen and high definition.



Source: NBTC

Share of Content Viewed by Thai Viewers (2020)

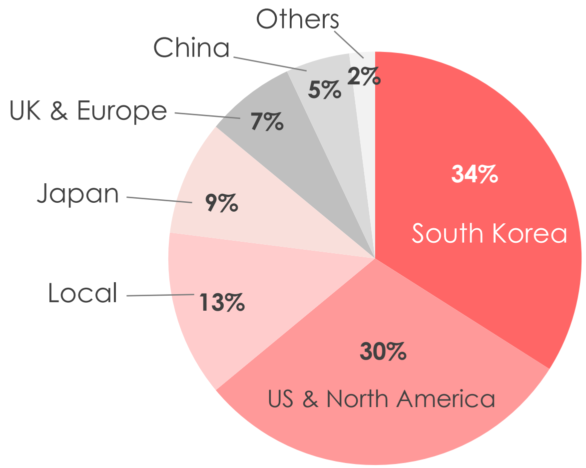


- Thai viewers consume more series/dramas than movies because it takes short time to finish an episode and no need to concentrate to watch as movies.

Source: NBTC

Note: Others include content about music, food , podcasts, game casts, news, etc.

Share of Video Streaming by Content Origin in Thailand (2020)



- Korean content has been popular in Thailand during the past decade and held a 34% share in 2020.
- Followed by content from the US, which is popular at the international level.
- Local content, especially Boy Love series are famous in streaming platforms watched by teenagers.
- Japanese and Chinese content have increasing of viewers since WeTV, iQiyi and Bilibili entered the Thai market.

Source: O'Halloran (2021)

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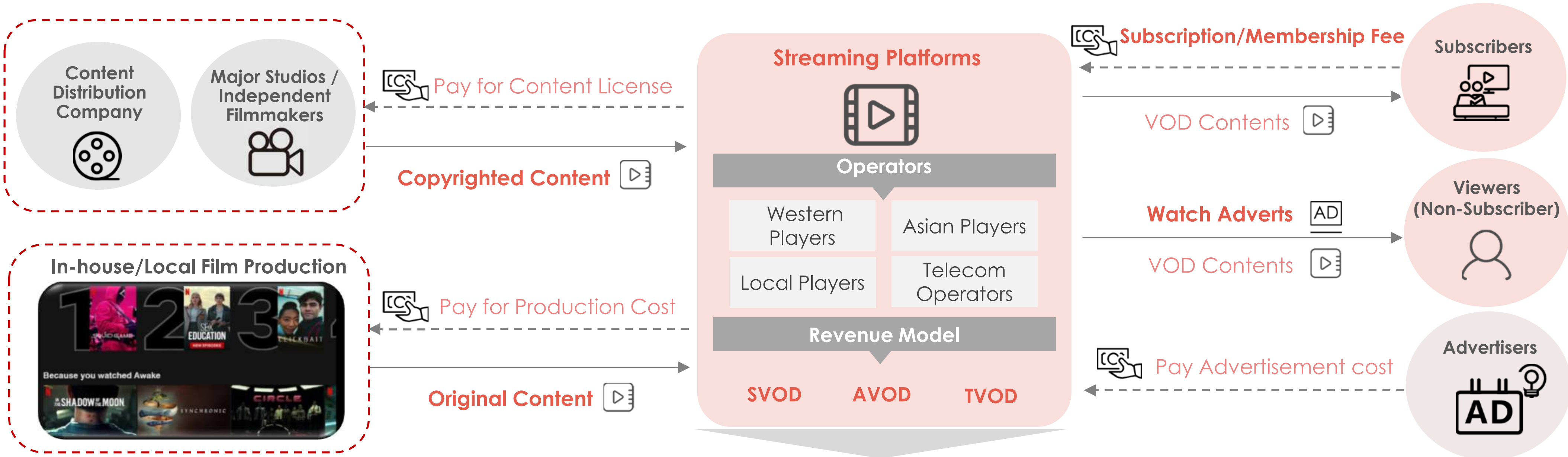
OTT Video Streaming Service Industry: Structure and Supply Chain

Supply Chain and Revenue Stream of OTT Video Streaming Services



Operator		Key Characteristics
Western Players	NETFLIX, Disney+ hotstar, HBO GO, prime video	✓ Providing only SVOD with the market dominated by Netflix ✓ Providing content of Hollywood movies/series and TV shows
Asian Players	viu, WeTV, iQIYI 爱奇艺, bilibili	✓ Providing hybrid model of SVOD and AVOD ✓ Main content is Asian such as Korean, Chinese, Japanese dramas/series and anime ✓ Dominated by VIU, which is well-known as a Korean content platform
Local Players	MONOMAX, DOONEE	✓ Service is only available in Thailand ✓ Focus on a variety of content, such as movies, series, variety, documentaries and cartoons for both local and global creators
Telecom Operators	AISPLAY, trueID	✓ Join video streaming market with the main purpose of offering value-added services for their customers ✓ Main content includes sports programs, music streaming, concerts etc.

Revenue Model

SVOD: Subscription Video On Demand

A monthly commitment or membership is required to access content. The service provider earns from subscription fee.

AVOD: Advertising-based Video On Demand

Users must watch ads in order to access content for free and the service provider earns from advertising fee.

TVOD: Transactional Video On Demand

Users purchase content on a pay-per-view basis.

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OTT Video Streaming Service Industry: Competitive Landscape

- The launch of international service providers started the streaming war and invited more players to join the market.
- With intense competition in the market, there were some streaming platforms who discontinued operation due to losses and were unable to penetrate the local market.

Competitive Situation

2011: OTT video streaming was introduced to Thailand by a local operator

- Video streaming was first operated in Thailand in 2011 by a local service provider, mainly offering re-broadcast movies and series.
- 'Line TV' was the first service operator who provided local content on a streaming platform. This was the turning point for Thais to watch more video streaming.
- Due to business success, new local and regional players have gradually joined the market since 2014.

2017: The start of the streaming war

- The launch of 'Netflix', the world leader of the video streaming market, followed by 'VIU', a platform for Korean content, popular amongst Thai viewers, brought the start of the 'Streaming War'.
- Local operators have lost the market share and revenue to foreign operators.

2020: More intense competition with several operators

- The streaming war grows even more during the Covid-19 pandemic, with more service providers from China and US joining the market.
- At the same time, there were few service operators who were unable to make profit and discontinued their services.
- The arrival of Disney+ Hotstar in 2021 makes competition in the market even higher and this will likely continue.

2021 Market Share

- According to AMPD Research, **Netflix dominates** the market with **40%** of total subscribers in Southeast Asia on OTT video service, followed by independent Asian providers, **VIU** 15%, **WeTV** 13% and **iQiYi** 10%.
- Local providers hold only a small share because the content on each platform is similar and not attractive enough for Thai viewers.
- Although Netflix is the market leader, its annual revenue has been declining due to content creators or major studios such as Disney, HBO etc. beginning to remove their movies/series from Netflix and instead operate their own platforms.

Market Entry & Exit Timeline

Source: Compiled by YCST from several sources (i.e. articles, public news, and company website)

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OTT Video Streaming Service Industry: Key Strategies

- Other than pricing strategies and free trials, building alliances with entrepreneurs is also one of the strategies to reach more consumers.
- Currently, the most important strategy for all operators is the production of original content to differentiate themselves from other players.

Pricing Strategies

Tiered Pricing

- Most OTT providers in Thailand use a cascade pricing strategy based on usage patterns, usually with two or more categories based on different usage scenarios i.e.
  - Level of video quality
  - Number of screens that can be viewed simultaneously
  - Number of accessible content

Free Trial

- Free trial strategy with no commitments allow viewers to consume content in a platform for a limited time without any costs. If viewers were satisfied with the service, they will be willing to subscribe to continue watching.
- According to Parks Associates, more than 30% of users who tried free trials turn into subscribers, while other reports, such as Uscreen, have shown consistent free trial results, where free trials doubled the revenue of SVOD services.

Netflix used to offer a one month free trial and it was very successful.

Freemium

- Allow viewers to access certain parts of the platform's content for free but they will be charged for accessing content in a better format such as Premium content, viewing without interstitial ads, downloading content for offline viewing, etc.

VIU allows users to download content for an additional fee.
This freemium strategy encourages more consumers to try the services and increase the likelihood to subscribe to the platform in the future.

Non-Pricing Strategies

Differentiating Products and Services

- Foreign OTT providers are focusing on producing **original content** to differentiate from competitors. Especially foreign providers, such as Netflix and Disney+, have continuously offered various original content on their platform to provide viewers a sense of exclusivity to build a long-term brand.
- Number of devices that can be used for streaming and video quality are important factors for consumers when deciding to use streaming services.

Building Alliances with Entrepreneurs involved in the Industry

◆ **Cooperation with telecommunication network operators**

Netflix has partnered with True to allow consumers with TrueID TV set-top boxes to download and install the Netflix application to access their content.

Disney+ Hotstar has partnered with AIS by offering exclusive packages, both monthly and yearly, for AIS customers to watch Disney+ Hotstar in order to attract more customers to the service.

◆ **Cooperation with Content Producers**

WeTV has partnered with Thai content producers to produce original local boys love series to distribute on its own platform.

◆ **Partnerships with Viewing Device Vendors**

Doonee has a B2B partnership with 'Altron' a local smart TVs brand, on which Doonee's application is installed in TVs or set top boxes as a standard application to attract more subscribers.

Source: NBTC

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OTT Video Streaming Service Providers in Thailand: Services & Fees

- Most video streaming platforms in Thailand are using SVOD and AVOD models.

	Platforms	Company	Country of Origin	2020 Net Sales (Million BHT)	2020 Net Profit (Million BHT)	Service Models			Subscription Fee
						SVOD	AVOD	TVOD	
Western Providers	NETFLIX	NETFLIX (THAILAND) LTD.	USA	N/A	N/A	●			99-419 baht / month
Western Providers	tv+	Apple Inc.	USA	N/A	N/A	●			99 baht / month
Western Providers	Disney+ hotstar	The Walt Disney Company	USA	N/A	N/A	●			799 baht / year
Western Providers	prime video	AMZN Mobile LLC	USA	N/A	N/A	●			199 baht / month
Western Providers	HBO GO	AT&T Inc.	USA	N/A	N/A	●			149 baht / month
Asian Providers	viu	PCCW Limited PCCW OTT (THAILAND) Ltd.	Hongkong	448.6	- 129	●	●		119 baht / month
Asian Providers	WeTV	Tencent (Thailand) Co., Ltd.	China	995.6	- 113.6	●	●		59 baht / month
Asian Providers	iQIYI 爱奇艺	Baidu, Inc. I-QIYI INTERNATIONAL (THAILAND) CO., LTD.	China	N/A	N/A	●	●		119 baht / month
Asian Providers	bilibili	Bilibili Inc.	China	N/A	N/A	●	●		299 baht / year
Local Providers	MONO MAX	Mono Streaming Co., Ltd.	THAI	271.3	- 163.3	●	●		250 baht / month
Local Providers	DOONEE	Mediaplex International Co., Ltd.	THAI	139.5	8.7	●	●		9 baht / day 150 baht / month
Telecom Operators	AISPLAY	Advanced Info Service PCL.	THAI	1,959.7	26,922.1	●	●		299 baht / month
Telecom Operators	trueID	True Digital Group Co., Ltd.	THAI	1,800.5	- 1,602.4	●	●	●	59 baht / month

Source: Ministry of Commerce, Company's websites

Note: The revenue of Telecom operators included show the total income of the company

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OTT Video Streaming Service Providers in Thailand: Key Strategies

- International players are focusing on the quality of content, while local players are focusing on the variety of content.

		Main Content	Strengths	Key Strategies	Future Focus
Western Providers	NETFLIX	• Hollywood movies • Western TV series • Netflix Original Content	• Netflix Original Content • High Video Quality (4K / Ultra HD) • Able to download videos • User engagement (able to Skip intro, Recap, Outro)	• Co-creating with local content creators • Bingeable content • Partnerships with Smart TVs and Game Consoles • Strong recommendations system • Social listening marketing	• Game streaming on platform • Netflix shop (Selling Netflix exclusive goods)
	Disney+ hotstar	• Original content - Disney cartoons - Pixar - Marvel - Star Wars • Movies and series	• Original Content • Thai Audio • Loyal Subscribers	• Partnerships - AIS (Exclusive Prices) - Local Film Production Companies (Exclusive Content) • Integrated Marketing Communication • Penetration Pricing (799B/year)	• N/A
Asian Providers	viu	• Korean series and variety shows • Asian content	• Thai audio • Dialect audio • Free content available	• Partnerships with Thai content providers and Payment Service providers • Strong recommendations system	• Produce more original local series
	bilibili	• Japanese anime • User-generated content	• Free content available • Variety of anime	• Free content • No adverts	• Local content creators
	WeTV	• Chinese series and variety shows	• Original content from China • Pay to rent content • Free content available	• Partnerships with payment services and OTT device providers • Offering 'Fastrack' (Pay per view content in advance)	• Produce more boys love series • Expansion of anime content
	iQIYI 爱奇艺	• Chinese series and variety shows	• Original content (boys love series) • Most content is free to watch • Live broadcasts with real-time translation	• Partnerships with local entertainment companies to co-create and distribute content	• Produce original Korean series • Aims to be the platform with the best content in Asia

Source: Compiled by YCST from several sources (i.e. articles, public news, NBTC and company website)

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OTT Video Streaming Service Providers in Thailand: Key Strategies

		Main Contents	Strengths	Key Strategies	Future Focus
Local Providers	MONOMAX	• Hollywood movies • Local content • Variety shows • Live sports	• Thai audio available for all content in the platform • Various packages	• 30 days free trial	• Partnerships with several broadband providers to secure more subscribers • Provide more exclusive content
Local Providers	DOONEE	• Hollywood movies • Western series • Variety shows • Documentaries	• Thai audio • Various packages	• Partnerships with Smart TVs and set top boxes to broadcast content on multiple platforms to attract more subscribers	• Will add a service model by grouping content that customers can view for free and earn extra income from advertising
Telecom Operators	AISPLAY	• Movies • Series • Concerts • Sports programs • Variety shows	• Free content available • Varieties of content • No adverts	• Partnership with VIU; subscribers are able to watch VIU free for 12 months • AIS users who subscribe to AIS play will able to watch Disney+ Hotstar free for 6 months	• Produce more original content
Telecom Operators	trueID	• Local movies and series • Hollywood movies • Japanese anime • Sports programs • Variety shows • Online TV	• Free content available • Exclusive content rental • Personalized recommendations	• Offering TRUE users to use true points instead to pay for and access exclusive content • 30 days free trial • Partnership with iQiY; subscribers are able to watch some content from iQiYi for free	• Turn the platform into an 'Eco-system' which connects to True shopping, We-mall and 7-11 delivery. Users can directly purchase products shown in adverts on the platform

Source: Compiled by YCST from several sources (i.e. articles, public news, NBTC and company website)

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Emerging Trends, Challenges and Opportunities

- Recently, Thai viewers are consuming more Asian content, such as Japanese animation, Chinese series and local boys love series. Therefore, this is an opportunity for Asian content creators or service providers to join the market to attract more Thai viewers.
- Although consumers are willing to pay for interesting content, they also cancel subscriptions if the specific content ends. This is one of the challenges for service providers to maintain subscribers.

Emerging Trends

Service Providers

Original content

- Streaming service providers in Thailand focus on creating original content for their platform in order to differentiate themselves from competitors.

Viewer behaviors

Asian content

- The return of the 'Anime Boom' recently led Thai viewers to view more Japanese animation content.
- Since the entry of Chinese service providers, such as WeTV and iQiYi, Thai viewers seem to watch more Chinese series.

Boys Love content

- Boys love series from local and Chinese players are popular among teenagers in Thailand.

Subscription behaviors

- Consumers are using more than 1 streaming platform and are willing to pay for interesting content.

Challenges

Viewer behaviors

- Consumer behavior in Thailand still has problems with piracy, even if there are many platforms available to view copyrighted content. Service providers are facing the problem of how to motivate consumers to use their platforms.
- Thai people rarely watch Thai dramas and Thai movies due to the monotonous plot and low-cost production values. So, local service providers face the problem of how to invite Thai viewers to watch local content.
- Viewers have no problem in cancelling their subscription if a specific show ends. Therefore, service providers need to think about strategies to turn viewers into loyal subscribers.

Opportunities

- ▶ Since Thai viewers are more interested in Japanese animation, there is possibility for Japanese video streaming service providers to introduce Japanese copyright content other than animation such as series, movies and variety shows to Thai viewers.
- ▶ Digital TV operators, who were disrupted by the popularity of video streaming platforms, have turned to producing content to broadcast on streaming platforms in order to increase revenues streams, as well as pushing content to audiences in various countries in addition to Thailand.

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Related Regulations & Taxation

- As OTT video streaming is a new service in Thailand, it is not currently controlled by any specific laws or regulations.
- Electronic service providers and electronic platforms are not required to issue a tax invoice or keep an input tax report.

Regulation

- The National Broadcasting and Telecommunication Commission (NBTC) did several attempts to regulate OTT content and their service providers but has not been successful. There were wide public debates and non-cooperation from the foreign operators.
- Therefore, as of now, there is no specific authority/ regulator or act to directly regulate and supervise the OTT streaming services business in Thailand.
- However, according to Tilleke & Gibbins International Ltd., OTT content is required to comply with the laws and regulations related to each type of content on a case-by-case basis. Laws that may be relevant to OTT services include the Copyright Act, the Personal Data Protection Act, and the Computer Crimes Act, which focuses on the content and patent rights.

Taxation

- Prior to September 2021, only local operators are subjected to business tax, which includes corporate income tax (CIT) and value-added tax (VAT). Foreign operators, who are not registered in Thailand, operated their businesses without any tax obligation.
- This difference in taxation is one of the key factors affecting the competitiveness of local operators.
- Therefore, the Revenue Department devised an 'E-service tax' to charge foreign operator.

Note: *Businesses subjected to the e-service tax include e-commerce platforms, online advertising, online accommodation booking, online music and video streaming, online games and applications.

Taxation Comparison Table

	Local Providers	Foreign Providers
Revenue Threshold	THB 1.8 million annually	THB 1.8 million annually
VAT Registration Process	Standard requirements	Simplified VAT system for e-services (SVE) via Revenue Department's website
Tax Invoices	Required	Not Required
Input Tax	Recoverable	Not Recoverable
Input Tax Report	Required	Not Required
VAT Filling and Payment	Monthly Basis	Monthly Basis
Permanent Establishment (PE) and Income Tax	Required	No PE and No Income tax
Penalties and Fines for Non-Compliance	Fully Applicable	Fully Applicable

Source: EY Corporate Services Limited (Bangkok)

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Conclusion

- The video streaming market is one of a few industries that was positively impacted by the Covid-19 pandemic due to the quarantine, giving people much more time to stream videos. Moreover, the increase in smartphone and internet penetration in Thailand is driving the growth of the OTT video streaming services market, with 1.53 million users of SVOD in 2021.
- The OTT video streaming market in Thailand is dominated by international players due to their advantages in their platforms' content investment, especially in original content production. Therefore, the current competition focuses on the production of more original content to differentiate themselves from others. The reason is not only exclusivity, but also as the copyright and content must be returned to its rightful owner when it is due, any good content which was previously available on the streaming platform does not stay forever. In addition to content and price competition, service conditions such as the number of streaming devices, video quality, subtitles and the upload speed of new content on the platforms are also main factors for consumers to considers before subscribing to any platform.
- Breaking down the video streaming content in Thailand, Korean content is the most popular among Thai viewers, followed by western content and local content.
- Recently, Thai viewers are more interested in Japanese animation. Therefore, this is a chance for Japanese video streaming service providers to entry the market in Thailand.
- The video streaming service market in Thailand is continuing to expand due to rising technological advancements and the entry of new players.

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