



OTT communication services in developed Asia–Pacific: consumer survey



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About this report

This report uses consumer survey data to identify which over-the-top (OTT) communication and social media apps are the most popular in developed Asia-Pacific (DVAP). It also assesses which OTT communication app features are used the most and identifies the barriers to VoIP adoption.

The survey was conducted in association with Dynata between August and September 2021. The survey groups were chosen to be representative of the mobile-internet-using population in developed Asia-Pacific. We set quotas on age, gender and geographical spread to that effect. There were 1000 respondents per country.

KEY QUESTIONS ANSWERED IN THIS REPORT

- Which OTT communication apps are used the most in developed Asia-Pacific?
- Is there still potential for growth in the OTT communication space?
- Which OTT communication app features are most-frequently used?
- How do consumers in developed Asia-Pacific balance their use of OTT communication services with that of traditional services?
- Which channels do consumers prefer to use to interact with brands?

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GEOGRAPHICAL COVERAGE

- Australia
- New Zealand
- South Korea



WHO SHOULD READ THIS REPORT

- Operator-based strategy executives and marketing managers who are interested in understanding consumer market trends and the changing role of operators as communications and digital service providers.
- Market intelligence and research executives in service providers that are responsible for understanding end-user trends and supporting business units in identifying and addressing new opportunities in mobile communications services.
- Equipment/device manufacturers and software providers that want to identify end-user trends in service and device usage and help their operator customers to better address communications opportunities.

The market for OTT CSM services in ANZ is fundamentally different to that in South Korea

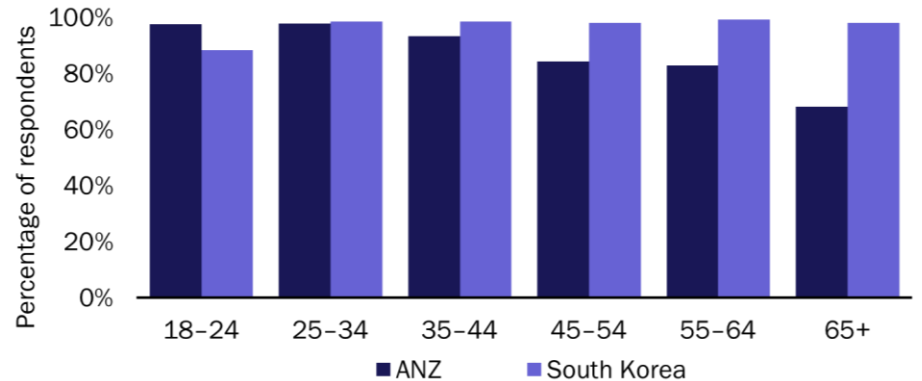
CSM services remain under-penetrated among older respondents in ANZ; Meta-owned apps are the most popular in these countries.

88% of respondents in ANZ use OTT CSM services and the penetration of these services did not change between 2020 and 2021. Older respondents are less likely to report using CSM than their younger counterparts. Meta-owned brands continue to dominate the market in ANZ. Indeed, 79% and 84% of respondents in Australia and New Zealand, respectively, use at least one Meta-owned app.

CSM app penetration in South Korea is saturated for almost all age groups; Meta services are less popular here than in ANZ.

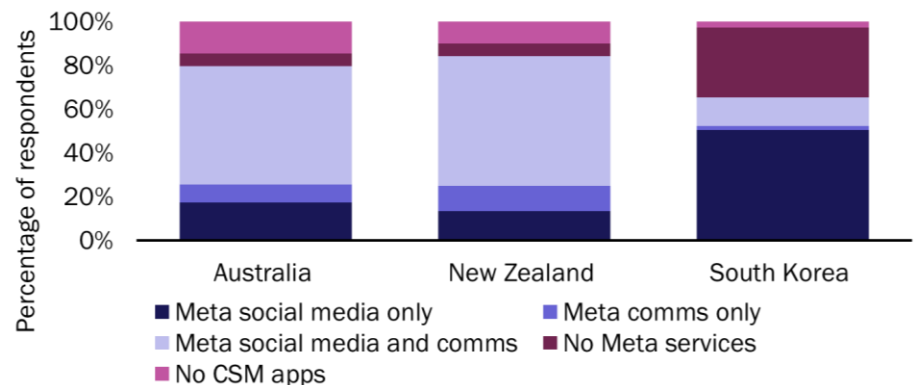
The adoption of CSM services is consistently high across all age groups in South Korea, though it is interesting to that the penetration is the lowest among 18–24 year olds. More older respondents reported using services that are typically targeted at younger consumers, such as Instagram and TikTok, in South Korea than in ANZ. KakaoTalk is the most popular OTT communication app in South Korea (see slide 8). As a result, Meta has been more successful with its social media services than its messaging services because they do not compete directly with KakaoTalk. Indeed, only 15% of South Koreans reported using a communication service owned by Meta and 50% of South Koreans use Meta’s social media platforms but no Meta-owned communication service.

Figure 2: Penetration of OTT CSM apps by age group, ANZ and South Korea, 2021¹



Source: Analysis Mason

Figure 3: Penetration of Meta services, DVAP, 2021¹



Source: Analysis Mason

¹ Please refer to the methodology and panel information section for the sample size and relevant survey questions. We categorise Facebook and Instagram as social media services, and Facebook Messenger and WhatsApp as messaging services.



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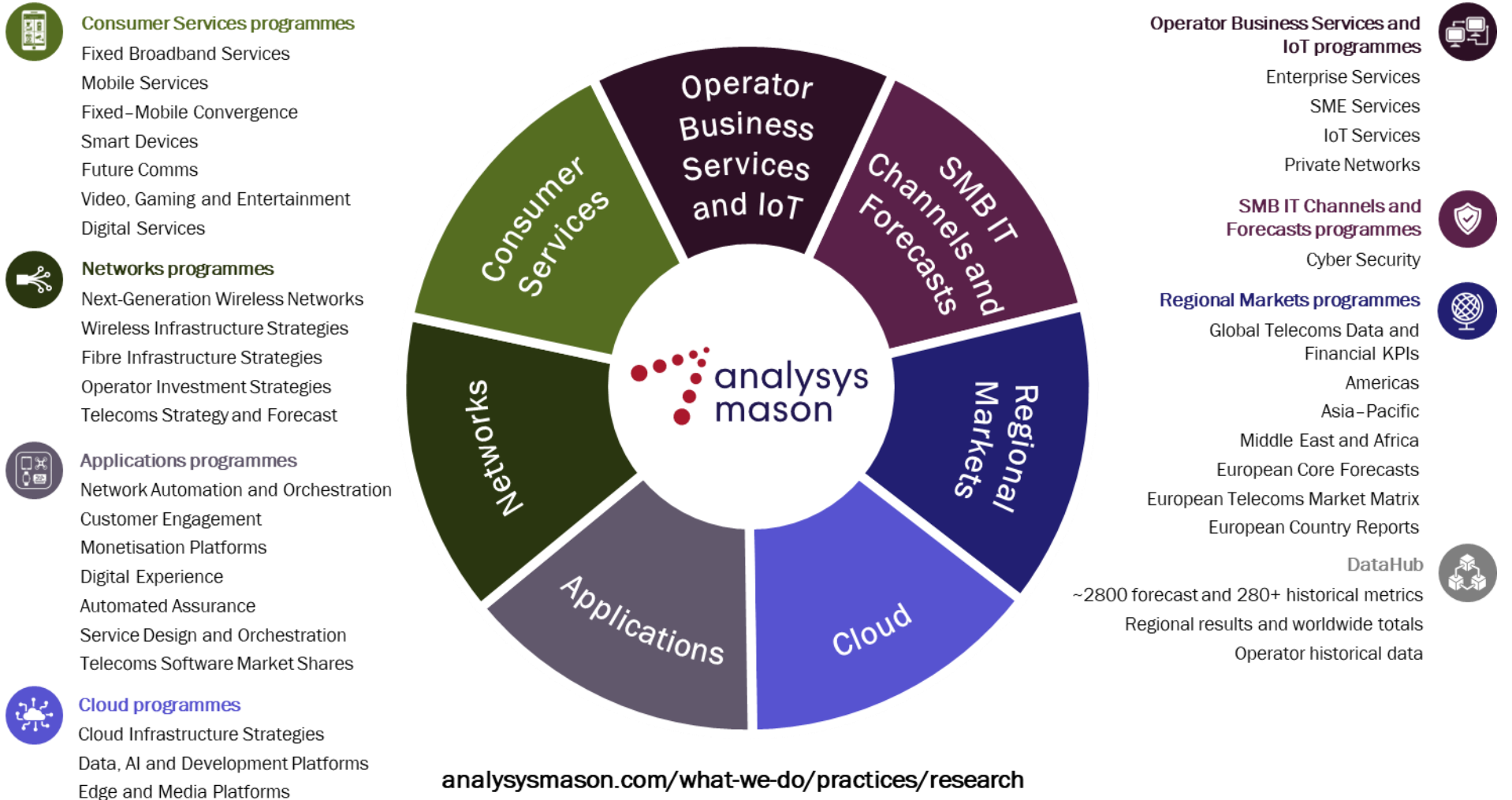
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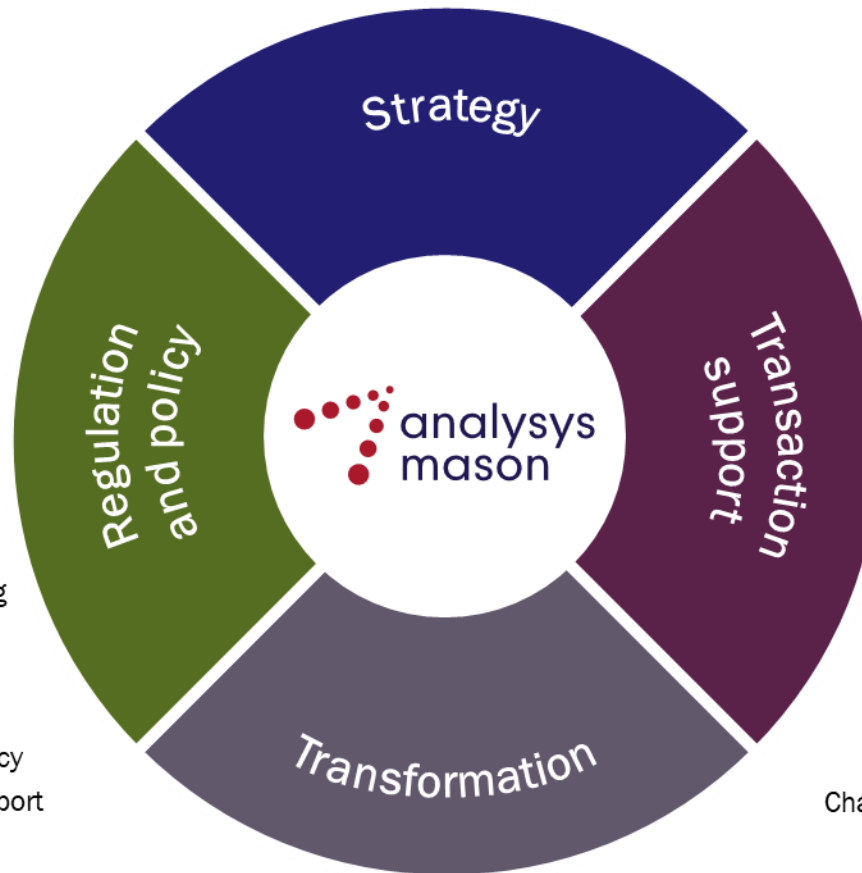
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PUBLISHED BY ANALYSYS MASON LIMITED IN JUNE 2022

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