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Foxtel, Disney+ and Amazon Prime Video are the big improvers for Subscription TV during 2021, but Netflix still the largest

New data from Roy Morgan shows Australians are consuming a variety of subscription TV services with Foxtel, Disney+ and Amazon Prime Video the big winners over the last year and all three growing their viewership by over 1 million viewers compared to a year ago.

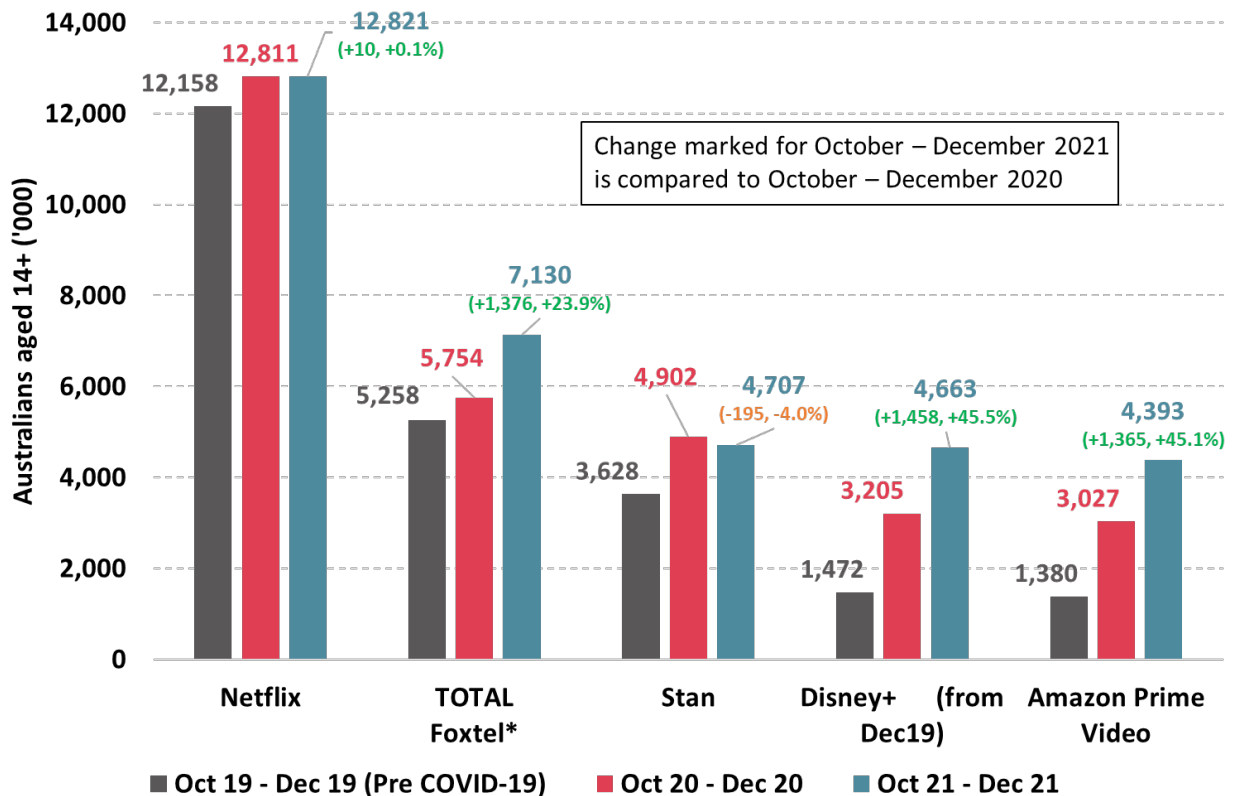
The onset of the COVID-19 pandemic in early 2020, and the series of lockdowns throughout both 2020 and 2021 that followed, kept Australians indoors for extensive periods during the last two years and led to large rises in people watching subscription TV services – especially newer subscription TV services.

Overall, 15,763,000 Australians (74.5%) watched a subscription TV service in an average four weeks in the three months to December 2021, up 387,000 (+2.5%) from the same period a year ago.

Despite the rapid growth for many rivals over the last year, Netflix remains the market leader in subscription TV with 12,821,000 viewers in an average four weeks, but up only 10,000 viewers on a year ago (+0.1%). Viewership of Netflix has increased 663,000 (+5.5%) from two years ago.

Foxtel has been one of the biggest winners over the last year and now has a total of 7,130,000 viewers of either Foxtel, Foxtel Now, Binge or Kayo Sports in an average four weeks, up 1,376,000 viewers from a year ago (+23.9%). There has been growth across all four services but clearly the strongest growth has been for Foxtel's Binge streaming subscription service which launched during the pandemic in May 2020.

Number of Australians watching leading subscription television services (SVOD/ Pay TV)



Source: Roy Morgan Single Source, October - December 2019, n=13,526, October - December 2020, n=16,641, October - December 2021, n=16,762. Base: Australians aged 14+. *Foxtel includes Binge, Foxtel Now & Kayo Sports.

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In a highly contested 'battle' for third spot Stan now has 4,707,000 viewers, an increase of 1,079,000 (+29.7%) on two years ago pre COVID-19. However, Stan has been unable to hold all the viewers it gained during extended lockdowns throughout the last two years and is down 195,000 (-4.0%) on a year ago.

The two biggest winners during the COVID-19 pandemic have been Disney+ and Amazon Prime Video – both have more than tripled their viewership over the last two years – both up by more than 3 million viewers.

Disney+, which launched in Australia (and worldwide) in November 2019, now has 4,663,000 viewers, an increase of 1,458,000 (+45.5%) on a year ago and up 3,191,000 (+216.8%) on two years ago. Disney+ is now in fourth place and just behind third-placed Stan for viewership.

Also performing well over the last two years Amazon Prime Video now has a viewership of 4,393,000. This represents an increase of 1,365,000 (+45.1%) on a year ago and up 3,013,000 (+218.4%) on two years ago. Amazon Prime Video is now just behind both Stan and Disney+ for viewership.

There are several subscription TV services outside the top five and over 5 million Australians now watch any of Apple TV+, Fetch, YouTube Premium, Paramount+, Google Play, Optus Sport, Telstra TV Box, Tubi, Britbox, Hayu, Flash, Hulu or Sports Flick – an increase of 1,769,000 (+54.5%) on a year ago.

This new data comes from Roy Morgan Single Source, Australia's most comprehensive consumer survey, derived from in-depth interviews with around 60,000 Australians each year.

Roy Morgan CEO Michele Levine says subscription TV was one of the beneficiaries of the pandemic with Government stimulus and enforced 'stay-at-home' orders leading to millions of Australians signing up for Subscription TV services – particularly Foxtel, Disney+ & Amazon Prime Video:

“Overall, 15.8 million Australians now watch Subscription TV in an average four weeks, an increase of 387,000 (+2.5%) on a year ago and up 650,000 (+4.3%) on two years ago pre-pandemic. However, the big movements over the last two years have been with Foxtel, Disney+ and Amazon Prime Video which have substantially increased their viewership during the pandemic.

“Foxtel now has over 7.1 million viewers, up over 1.3 million (+23.9%) from a year ago and up by almost 1.9 million (+35.6%) from two years ago. The growth for Foxtel has been across all its platforms but has been strongest for the new Binge streaming subscription service, launched in May 2020, and Kayo Sports, launched in November 2018. Both new services have well over 1.5 million viewers already.

“Even more impressive has been the performance of Disney+ which launched just over two years ago in November 2019. Disney+ attracted around 1.5 million viewers within its first month and has since added nearly 3.2 million viewers (+216.8%) over the last two years – largely during the COVID-19 pandemic.

“Just behind is Amazon Prime Video with around 4.4 million viewers. Amazon Australia began operations in December 2017 and the pandemic has provided a big boost to their business – including Amazon Prime Video. Over the last two years Amazon Prime Video has added over 3 million viewers (+218.4%)

“The big increases in viewers for newer services hasn't been matched by the more established players. Although both Netflix and Stan added a significant number of new viewers in 2020 this momentum was not sustained in 2021. Over the past year Netflix viewership was virtually unchanged at 12.8 million while Stan, Disney+ and Amazon Prime Video are now almost tied for third position with 4.4-4.7 million viewers.

“The results of the last two years, and particularly over the last year, show that as competition intensifies in the Subscription TV market the pressure grows to bring new content to market to provide new reasons for people to sign up, or continue subscribing.

“The large growth for newer services, even as the broader market grows much more slowly, shows that Australians are increasingly prepared to subscribe to multiple services. The average number of Subscription TV services Australians use has increased from 1.8 in December 2019 to 2.7 today.”

Related research findings

To access data on the customers of each pay television service, including [Netflix, Foxtel, Stan, Disney Plus, Amazon Prime Video and others](#), view the Roy Morgan online store.



For comments or more information about Roy Morgan's pay television data please contact:

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About Roy Morgan

Roy Morgan is Australia's largest independent Australian research company, with offices in each state, as well as in the U.S. and U.K. A full-service research organisation, Roy Morgan has over 80 years' experience collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2