THE ASIA VIDEO INDUSTRY REPORT

2023

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ASIA VIDEO INDUSTRY ASSOCIATION

ABOUT AVIA

The Asia Video Industry Association (AVIA) is the trade association for the video industry and ecosystem in Asia Pacific. It serves to make the video industry stronger and healthier through promoting the common interests of its members. AVIA is the interlocutor for the industry with governments across the region, leads the fight against video piracy through its Coalition Against Piracy (CAP) and provides insight into the video industry through reports and conferences aimed to support a vibrant video industry.

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The Asia Video Industry Report 2023 is curated end edited by Charmaine Kwan, Head of Marketing and Communications, AVIA.

Please note that data and contributions provided by third parties have been generated independently and represents their own views.

AVIA IS

POLICY

THE VOICE OF THE INDUSTRY WITH GOVERNMENTS AND REGULATORS

PIRACY

DEDICATED TO FIGHTING AND REDUCING VIDEO PIRACY

INSIGHT

COMMITTED TO PROVIDING INSIGHT THROUGH ENGAGEMENT

The Asia Video Industry Association (AVIA) exists to make the industry stronger and healthier and thus create a better business environment for its members.

A FUTURE OF GROWTH AND SUSTAINABILITY

The annual Asia Video Industry Report is a treasure trove of insight and information and if you want a holistic view of the state of our industry at the end of 2022, it is required reading. There is such a variety of topics and opinions that it is a great resource to be able to revisit and always find something new.

The other great thing about this report is that like everything that we do, it represents our membership. As an industry body, our strength always lies in the members we represent. It is by channelling the passion and hard work of all of you that we, as an industry, can be successful.

Nothing is ever straightforward or predictable. We thought the outbreak of a global pandemic was going to test us and it did, but perhaps not as much as now - the process of coming out of it, with the world's economy under serious strain. Visions of a tech-led future that saw valuations reach historic levels under COVID have been replaced with a more sombre assessment of priorities – the key ones being financial profitability and sustained growth prospects.

So while there is little doubt some of us will have some rocky times ahead, I am very confident of the outlook of the Asian video industry. Profitability and sustained growth prospects are exactly what I see. They may not be the first to tell you, but consumers love what they are getting. They love the wealth and depth of amazing shows being produced, they love the international hits, they love the local investments in their own stories and culture, and they love discovering lesser-known shows from countries they are less familiar with.

Is there more rationalisation which needs to be made? Will we see more consolidations? Will there be more debate about peak content and its relationship to financial stability? The answer to all three of these questions is certainly yes. But these are growing pains in a sector that will continue to grow and be immensely successful. All the tweets and user generated content in the world cannot replace the value of well-crafted, well-told and well-produced stories.

I also believe we have matured enormously as an industry over the last few years. If there was any panic over the disruption the industry has been through, I believe it has gone. And I see greater certainty and confidence in the roles each company plays. There is a more sombre assessment by each company of the value that they bring which others do not. Temptations to try to be D2C and D2B and a content producer and a tech company have abated, and we look more like an industry now with everyone in their right place.

The role AVIA plays continues to evolve and while it is not always directly visible, I believe it remains more important now than at any previous time. The analogy I always use is of building and securing the foundations on which our industry sits. The stronger and more secure we can make them, the taller the individual buildings can grow. The impetus to regulate in the digital realm is only getting stronger. We need to continue to make sure governments across the region understand the differences between us and UGC or social media content, and understand for example, that an issue such as online harm is not one our industry faces. Access to appropriate content is more easily managed in the world of OTT, through parental controls putting the consumer in control of their household.

There are many more examples of issues where we all align and now as we are able to travel once again, our ability to take the positive messages from our industry to governments around the region have increased exponentially.

Piracy continues to threaten our foundations and we continue to combat it. Working to understand the evolution of the problems, measuring our success in containing it, working with governments to give us better tools and protections to allow legitimate content to prosper and building coalitions among our local and international members to present a common front, are all key priorities.

For the last three years we have also been increasingly focused on how we can support the growth of advertising as we have witnessed what we think has been a disproportionate migration of high-quality produced content on TV to social media. OTT is the technological evolution of TV, and while the medium may be more fragmented than TV was, this is changing and clearly, we all see international shifts to focus more on advertising gaining momentum.

Finally, our role is simply to wonder and ask the questions to understand how our industry is evolving and how we can help support that evolution. I hope this report will provide answers to many of those questions we all have. ■

Louis Boswell
Chief Executive Officer
AVIA

CONTENTS

SETTING THE STAGE - POLICY CHALLENGES

POLICY IN ASIA

Stepping into any new role 18 months ago, amidst the chaos being wreaked by COVID, was always going to be challenging. Doing so within an industry association where the very nature of the role requires close collaboration with regulators and members made the task infinitely harder. Navigating new online experiences and meeting colleagues and members through Zoom was never going to be ideal but somehow, we have managed to maintain that team spirit both within AVIA and with all our members. While we have never underestimated the value of face-to-face meetings, especially in Asia, this continued collaboration has ensured that the Policy team at AVIA has been well-placed to face the onslaught of regulation that seems to have been borne out of the pandemic. As we start returning to physical meetings despite the inevitable inertia that has taken root, we are confident that we will be able to build on these relationships and ensure that we can effectively address the challenges that some of these new regulatory initiatives seek to introduce.

COVID has certainly acted as a catalyst for regulators to consider not only how their economies emerge but also how to ensure the sustainability and continued growth of those economies. Given the success that OTT platforms have witnessed during lockdown, it is no small surprise that regulators have primarily turned their attention to these online providers in an effort to extract a share of some of those reaped benefits.

VIETNAM

Vietnam is one of those markets in which regulators have sought to introduce tax portals for offshore companies to pay the tax which would ordinarily be recoverable from the users of those services, the end consumers. While registration has been made compulsory, drafting discrepancies continue to be addressed and the extent of what constitutes compliance, remains uncertain. Unfortunately, these compliance challenges have also made their mark in other regulations where the initial empowering legislation had been met with so much optimism. This is nowhere more true than in the case of the Cinema Law and its draft implementing regulations where we hoped that only a "simple notification" would be required, involving only a list of the titles and rating assigned. A few months down the line and all is really not what it seemed. We have heard that the current draft of the implementing regulations may propose that the capacity will require, amongst other things, proof that the service provider is paying tax in Vietnam and that the service provider offers parental controls with accompanying tutorials. If that is indeed the case, it would be disappointing that the proposed regulations overall will take us five steps back from what initially seemed like a practical and viable alternative to a licensing framework.

Decree 6, on the other hand, has not moved from its position of requiring a local license and local office establishment and it has also held firm on the restrictions it imposed on foreign television channels around editing, translation, and local advertising insertion. As we write, Decree 71, amending and formally supplementing Decree 6 on the Management, Provisions and Use of Radio and Television Services, has been formally published with an operational date of 1 January 2023, to coincide with the commencement date of the Cinema Law. The industry had been optimistic that, with the removal of the licensing requirement in the Cinema Law, the licensing requirements in Decree 6 might have similarly been relaxed. Unfortunately, that is not the case. The licensing requirement will continue to apply to all channels and SVOD services which provide titles beyond what the Cinema Law has designated as "films". This licensing requirement will in turn require the service provider to set up a local establishment under the Press Law and while a foreign entity will be allowed to wholly own this local establishment, approval from the Prime Minister will need to be sought. Until such time as the Press Law is amended, it seems that these licensing requirements are here to stay.

INDONESIA

While regulators in Indonesia, via Regulation 5/2020, opted for registration (as opposed to more stringent licensing) by all private electronic service operators through an online submission portal, criticism and pushback from the industry was primarily focused on what that registration might entail. Concern arose given that registration required two further obligations - (i) compliance with content moderation provisions, including the widely drafted prohibition of information that disturbs the public order, and (ii) compulsory provision of access to the service provider's electronic system and data upon receipt of a request from the relevant ministry or government agency. While it appears that most of the focus is currently on gambling service providers, the breadth of the regulation and the sanctions, which include takedowns and service suspensions, remain troubling to companies seeking to offer goods and services within the market.

The other major issue that has garnered much attention in Indonesia of late is the recent spate of data protection breaches. The regulatory response - the Personal Data Protection Bill (PDPB) - seeks to address consumers' concerns but leaves service providers slightly uneasy given the ambiguity of some of its provisions, POLICY

not least its failure to address whether the computation of revenue penalties is to be made with reference to a service provider's domestic or global revenue.

INDIA

The debate about data protection has probably been loudest in India where an initial draft bill sought to regulate non-personal data and was withdrawn after significant pushback from industry. Work has now begun on a replacement bill. Commentary from the Ministry of Electronics and IT (Meity) has drawn a clear distinction between privacy and data protection, stating that the PDPB will seek to address how companies collect, store, and process data and that the purpose of the PDPB was not "to do anything with privacy". They have also indicated that the government's exemption from compliance with the PDPB will remain, on the basis that the government is not "monetizing" the data but instead using the data for a different purpose i.e. governance and public service. It is of course a fine distinction and one we expect other regulators to adopt as they seek to find ways to protect their citizens' personal data.

Regulators in India have been especially active since the end of last year, addressing issues such as whether healthy competition continues to thrive within the cable industry or whether there is a need to regulate the sector. The ongoing debate around TRAI's New Tarif Order 2.0, proposed regulations (which subsequently became "recommendations") on the participation of child artists within the entertainment industry, regulatory framework proposals around the establishment of data centres, content delivery networks and internet exchanges and a consultation paper around ease of doing business within India. All these proposals and consultation papers have kept the Policy team on our toes but it has been encouraging to see the regulators pull back from implementing regulation where evidence is advanced, either through industry submission or public consultation, that no regulatory intervention is needed and should not be introduced without formal regulatory impact assessments having been conducted.

TRENDS IN CONTENT REGULATION AROUND THE REGION

As we see in many markets around the region, many of these initiatives tend to arise from a stated effort by regulators, to create a level playing field by trying to import stringent legacy regulation into the OTT universe but we continue to advocate for self-regulation as much as possible, employing our Governance Framework as a useful tool to demonstrate how the curated content industry takes its social responsibilities seriously by not showcasing illegal content, implementing a robust consumer feedback mechanism and putting content controls squarely in the hands of the consumer to decide what content they and their families are able to access.

Some regulators, however, are yet to be convinced that presenting consumers with this level of choice and control is sufficient to afford the consumer the necessary level of protection against content which potentially offends the social norms and cultural nuances of that consumer's market. While AVIA's members have always appreciated and acknowledged that each market's cultural norms are different, AVIA works hard to rebut blanket pre-censorship which does not take into account evolving market nuances or which severely limits freedom of expression. Some markets like Malaysia and Singapore allow service providers to operate relatively unencumbered in the market provided they abide by the relevant content codes which have been put into place. However, we do see an increased eagerness across the region to regulate more closely all content which appears on OTT platforms, regardless of whether that content is part of the substantive offering or simply publicity and marketing material promoting that offering. Unfortunately, as regulators lobby to have their regulatory scope increased, we also witness more stringent takedown notice requirements being considered, with Vietnam and Indonesia recently proposing 24 hour notice takedown obligations. This is not pragmatic, especially for those companies headquartered in other jurisdictions, so we will continue our lobbying efforts to advocate for provisions which are both reasonable and which offer the affected party an opportunity to be heard.

Having finally returned to our first physical "in view" events in a few years, including our first Korea in View event, we are hopeful that the opportunity to engage in person with regulators will offer industry a much-needed platform to explain the challenges that could potentially impede growth and innovation within a market. We remain of the view that greater understanding on both sides will undoubtedly lead to the establishment of regulatory frameworks that foster the growth of the industry and are in line with modern, international best trends. We are also hopeful that a return to our annual Policy Roundtable event, again back in person, offers regulators and industry members a time to reflect and to remind ourselves of the fascinating and inspiring journey the video content industry has been on, how it has evolved, what the current key challenges are, how we can work together to ensure the industry's sustainability while minimising our impact on this planet and ultimately, offer us the opportunity to explore what the future holds - the next frontier of the content industry's evolution. ■

by Celeste Campbell-Pitt
Chief Policy Officer, AVIA

POLICY

INDIA UPDATE

REGULATION OF VIDEO IN INDIA

Over the last 2 years, there has been a spate of new regulation in India in respect of video content. As a result, all major modes of content dissemination and all forms of content including news, fiction, non-fiction, reality TV, and advertisements are now regulated.

THE INFORMATION TECHNOLOGY (INTERMEDIARY GUIDELINES AND DIGITAL MEDIA ETHICS CODE) RULES, 2021

The Information Technology (Intermediary Guidelines And Digital Media Ethics Code) Rules, 2021 (**IT Rules 2021**) have introduced a framework for regulating online content in India, and require content providers to exercise diligence over content and establish a 3-tier grievance redressal mechanism with an inter-departmental committee constituted by the Ministry of Information and Broadcasting (**MIB**) acting as the final tier. The MIB may refer grievances to the inter-departmental committee [1] and issue guidance and advisories to content publishers, and the committee may recommend that publishers [2] be warned, censured, admonished, or reprimanded.[3]

The involvement of the MIB and inter-departmental committee has led to concerns that the rights to freedom of speech and expression, freedom of press, and dissent on the internet will be curtailed.

The IT Rules 2021 also prescribe a broadly worded Code of Ethics for publishers of content.[4] However, the Bombay High Court has, for the present, stayed the operation of Rules 9(1) and 9(3) of the IT Rules 2021 [5] which mandate the adoption of a Code of Ethics.

Oddly, online content is being regulated under the Information Technology Act, 2000 (**IT Act**) [6] rather than a bespoke legislation enacted pursuant to discussions with stakeholders and parliamentary approval.[7] The IT Act provides legal recognition for transactions conducted by means of electronic data interchange and electronic communication, facilitates electronic filing of documents, and addresses cybercrime.[8] Whether the courts will hold that the IT Rules 2021 have exceeded the scope of their parent Act remains to be seen.

THE CABLE TELEVISION NETWORKS (AMENDMENT) RULES, 2021

The Cable Television Networks (Amendment) Rules, 2021 (**CTN Rules 2021**) were notified following a recommendation from the Supreme Court [9] that a formal complaint redressal mechanism be established for consumer grievances in respect of television content. Until then, the pay TV space was self-regulated by autonomous bodies recognised by the MIB such as the Broadcasting Content Complaints Council and the News Broadcasting Standards Authority which dealt with complaints relating to television content. The Broadcasting Wing of the MIB had also formed an Inter-Ministerial Committee and an Electronic Media Monitoring Centre to address public grievances regarding television content, and to ensure compliance and issue advisories in relation to the Programme Code and the Advertising Code.[10]

The CTN Rules 2021 establish a 3-tier complaint redressal mechanism, identical to the IT Rules 2021, and allow the MIB to prohibit the transmission or re-transmission of a channel or programme which is in violation of the broadly worded Programme Code [11] or the Advertising Code.[12] The CTN Rules 2021 refer to guidelines prescribed by the Advertising Standards Council of India (**ASCI**), a self-regulatory authority, and lay down the timeline (but not the procedure) to be followed by ASCI to dispose of complaints raised to it.

1 *Rule 13(1)(c) of the IT Rules 2021.*
2 *Rules 13(1)(d) of the IT Rules 2021.*
3 *Rule 14(5)(a) of the IT Rules 2021.*
4 *Appendix to the IT Rules 2021.*
5 *Nikhil Mangesh Wagle v. Union of India, Public Interest Litigation (L) No. 14204 of 2021; Agij Promotion of Nineteenonea Media Private Limited & Ors. v. Union of India, Writ Petition (L.). No. 14172 of 2021.*
6 *Section 69A of the IT Act, also see "Government notifies Information Technology (Intermediary Guidelines and Digital Media Ethics Code) Rules 2021", Press Information Bureau, Ministry of Electronics and Information Technology, February 25, 2021*
7 *Note that content published through other modes is governed through specific legislation such as the Press Council Act, 1978 and Press and Registration of Books Act, 1867 for print news, the Cable Television Networks (Regulation) Act, 1995 for television broadcast, and the Cinematograph Act, 1952 for films.*
8 *Introduction to the IT Act.*
9 *Common Cause v. Union of India & Others (2018) 13 SCC 440.*
10 *Rule 4 of the CTN Rules 2021, newly inserted Rule 17(1).*
11 *Rule 2 of the CTN Rules 2021 inserted Sub-Rule (7) in Rule 6 of the CTN Rules 1994.*
12 *Rule 3 of the CTN Rules 2021 inserted Sub-Rule (12) in Rule 7 of the CTN Rules 1994.*

THE CINEMATOGRAPH (AMENDMENT) BILL, 2021

The government has proposed the Cinematograph (Amendment) Bill, 2021 (**Cinematograph Bill**) which, in its present form, allows the government to revoke a certificate granted to a film, and direct the censor board to re-certify films. The Cinematograph Bill been criticised for enabling excessive state participation as the government may determine which films can be released to the public in the interest of the sovereignty and integrity of India, state security, relations with foreign states, public order, decency or morality or in relation to contempt of court, defamation, or incitement of any offence.

WHAT NEXT?

The regulatory framework, along with the amendments proposed by the Cinematograph Bill, is ambiguous and allows the government to be the adjudicator of permissible speech in the country. The intention of recent regulations appears to be to treat TV content at par with the internet, which will likely hinder the liberties that content for private viewing on OTT platforms could afford and may lead to publishers pre-emptively censoring their content to avoid adverse action. Meanwhile, reports indicate that, in light of the converged content environment, the government is considering an overarching legislation governing content across print, electronic, digital media, and cinema.[13]

Content is being regulated by numerous state authorities on the grounds that, under Article 19(2) of the Constitution of India, the state may place ‘reasonable restrictions’ upon the freedom of speech and expression. If the freedom of speech is to be maintained, and democracy protected, the regulatory framework should limit government oversight rather than expanding it. ■

by Kaushik Moitra
Partner, Bharucha & Partners

BHARUCHA & PARTNERS *was founded on enduring principles of professional ethics and excellence. The Firm has offices in 3 cities with 15 partners and over 100 associates who offer a mix of rich experience, creativity, and the energy of youth. B&P is a full-service firm and advises clients on domestic and cross-border issues across sectors and geographies.*

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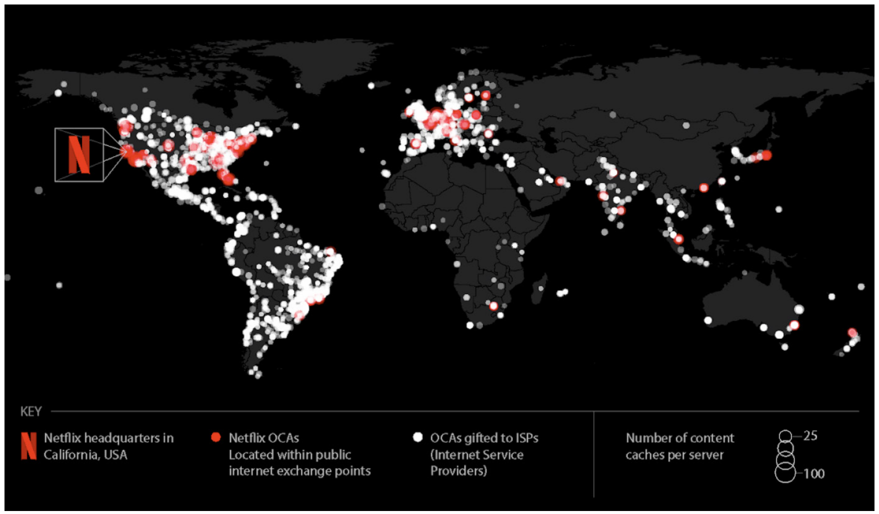
13 *See Centre mulls single law to supervise all media, Hindustan Times, 17 August 2021 – available at* https://www.hindustantimes.com/india-news/centre-mulls-single-law-to-supervise-all-media-101629149955442.html

INVESTING IN CONTENT DELIVERY
ON THE OPEN INTERNET

Wherever they are and whenever they want, consumers can access a trove of movies and TV shows right at their fingertips — opening up new worlds, cultures and perspectives to them.

That's the beauty of streaming, and it's all made possible by the internet and the concept of Net Neutrality, which ensures Internet Service Providers (ISPs) treat access to all sites equally. Meaning you are able to access the latest season of *Stranger Things* just as easily as you can purchase concert tickets to see your favorite artist.

But unfortunately, we have come to a crossroads where internet gatekeepers could get to decide if the next great Korean, Indian, Australian, Thai etc. story can be watched, and loved, by the world. ISPs in many parts of the world, including the Asia Pacific, are seeking to extract arbitrary payments from streaming services for simply making shows and films available to their subscribers who are already paying for their internet connection. Because by making both consumers and content providers pay, they can get paid twice.



Proposed legislation would require internet content providers to pay network fees to local ISPs for access to their customers. Such a move violates 'net neutrality' principles that ISPs have to provide access to virtually all endpoints of the internet and that all online traffic should be treated equally.

The stated rationale for the proposed fees is that the growth of internet traffic is creating 'unsustainable costs' for the ISPs. Yet this overlooks multiple points.

First, increased usage incentivizes users to upgrade their plans, which is an opportunity for ISPs. We see that subscribers of streaming services are more likely to subscribe to higher speed plans, and many ISPs bundle plans together.

Second, investment in technology ensures that growing demand from end users can be handled sustainably without increasing network costs over time, as has been observed in the past — internet traffic grew 50-fold in the past decade. Charging a fee would distort this incentive for ISPs to invest in efficiency.

Lastly, content providers, such as Netflix, already invest to handle traffic efficiently. We recently celebrated the 10th anniversary of our global content delivery network called Open Connect. We offer this device for free to ISPs around the world, enabling Netflix content to be stored as close to members as possible to reduce congestion and cost. A win-win for all.

Consumers in APAC should be able to continue streaming and enjoying their favorite films and shows from everywhere. To do that, the world needs a long-term commitment to collaboration and a free and open internet. ■

by Nick O'Donnell
Head of Public Policy, Asia Pacific, Netflix

***NETFLIX** is the world's leading streaming entertainment service with 223 million paid memberships in over 190 countries enjoying TV series, documentaries, feature films and mobile games across a wide variety of genres and languages. Members can play, pause and resume watching as much as they want, anytime, anywhere, and can change their plans at any time.*


PIRACY IS THEFT

CAP 2022
A YEAR OF CHANGE & PROGRESS

Niccolo Machiavelli was much more than just Machiavellian; a little over 500 years ago he wrote *Discorsi sopra la prima deca di Tito Livio*, known in English as the *Discourses on Livy*. The Discourses was an examination of the early Roman historian Livy's history of Rome, *Ab Urbe Condita*, or *From the Founding of the City*. The Discourses illustrate Machiavelli's belief that history shows time and again that we must never forget the past but use it to build our future, and in the third and final book of the Discourses, he focuses on the actions of the men who made Rome great (a book sadly misunderstood by Starship in their 1985 hit "We Built this City (on Rock and Roll)"). It is in this book that Machiavelli notes that 'whosoever desires constant success must change his conduct with the times'. Never has a maxim been more relevant than in recent years, including for CAP.

In January, CAP underwent a major change in leadership. The change provided a good opportunity to step back, review where CAP was, how we got there, and most importantly, how we move forward. This review resulted in the identification of CAP's goal to be "leading the protection of AVIA member company content online in the Asia Pacific region". CAP's mission was then outlined in the 'Strategy on a Page' which was built around the four pillars of Collaboration; Research & Technology; Enforcement and Disruption, and Engagement and Outreach. The review also identified CAP's work as being imbued with our values of being Collaborative; Transparent; Strategic; Innovative, and Impactful. The goal and the mission were what underpinned and drove CAP's work throughout 2022.

COLLABORATION

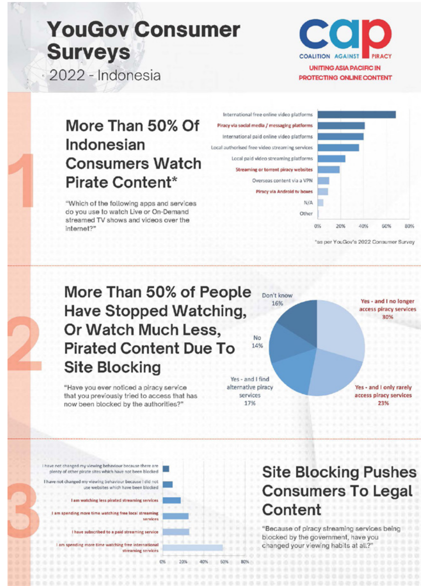
From day one, collaboration with our key stakeholders, particularly the CAP Steering Committee and local coalitions, has been a defining feature of CAP's work, and it is through this work that we ensure an effective strategy with the capacity to create and sustain enforcement momentum around the region. In 2022 CAP re-energised this pillar with a particular focus on communication. Newly created quarterly reports were distributed to the Steering Committee at the end of each quarter, and these were each followed with quarterly meetings to review CAP's activities and strategies from the quarter as well as looking ahead for those planned for the next. CAP also enacted regular one on one calls with members to ensure ongoing engagement with all.

The role of local coalitions was also galvanised in 2022 with the Video Coaltion of Indonesia (VCI) being key to the extension of our site blocking efforts there. It is hoped CAP's creation of the Video Coalition of the Philippines (VCP) in September 2022 will bear similar fruit in ensuring efficient and effective site blocking procedures are put in place in the Philippines in the near future.

RESEARCH & TECHNOLOGY

Research and technology continue to underlie much of CAP's work and we launched in 2022 with the release of a CAP commissioned Cyberstronomy report into the risks to consumers by accessing pirate sites. The report, "Time to Compromise", replicated the user journey for consumers who access piracy apps and streaming websites, and illustrated the potential scale and risk for these consumers. We have referred to this report numerous times throughout 2022, particular in discussions with government to highlight the dangers to consumers from pirate sites.

The YouGov consumer surveys have proven to be increasingly valuable to CAP, in their simplest form they help us best identify the nature of the problems we face in each country. In 2022 we moved from an ad hoc undertaking of the reports in different countries at different times, to an annual survey undertaken across multiple countries at the same time. The first of these annual reports was released in March and provided a wealth of data on consumer attitudes to piracy across the region. Later in the year, CAP provided two-page graphic summaries of the key data for each country, and as we move forward to undertake the reports on an annual basis, we will have a more longitudinal analysis to hand of piracy, how it is evolving across the region, and in particular the effectiveness of the various actions we are taking.



The YouGov reports identified something that we had presumed for some time without having any hard evidence of, that social media and messaging apps were the most popular forms of accessing pirate content around the region. Telegram in particular had developed into a platform of some concern and in late March, CAP released a report commissioned from Synamedia that highlighted the very real nature of the concern. We followed the release of the report with two seminars with Synamedia on the nature of piracy on Telegram and what can be done to counter it.

In response to growing interest in Korea, in May CAP released a Korean Online Piracy Landscape Report. The Report looked at the rates of piracy in Korea, as well as the public perceptions of piracy.

Along with the YouGov reports, the MagiCAP portal has been essential to CAP's work in its identifying of pirate sites of concern around the region, and particularly in tracking piracy traffic and superbly illustrating the impact of blocking. 2022 saw a total overhaul of the portal and a new and improved MagiCAP 2.0 with extra fiddly bits is expected to be launched in Q4.

ENFORCEMENT & DISRUPTION

The YouGov reports have shown the effectiveness of site blocking in combatting online piracy, perhaps nowhere more starkly than in Indonesia where CAP's rolling site blocking strategy has seen more than 4,000 pirate sites blocked in the last three years, resulting in 50% of Indonesian consumers saying they no longer access pirate sites at all, and another 34% saying they rarely do. This has however seen a growing migration of pirate sites to IP address only locations, which cannot be blocked by the normal method of DNS (domain name server) blocking as there is no domain to be blocked. To counter this, in Q3 CAP entered into a three-month IP address blocking trial with the Indonesian telecommunications regulator, Kominfo.

Throughout the trial CAP worked with Vidio to forward Kominfo 10 sites a month for IP blocking, which were then monitored daily with changes being immediately reported to Kominfo. The trial proceeded smoothly and in Q4 CAP will be working with Vidio and Kominfo to expand the trial to a more regular program of 50 sites being referred every month.

CAP's blocking program also continued apace in Singapore when we obtained our largest ever blocking order of 30 sites and close to 150 associated URLs being obtained in Q1. The order was a 'dynamic' one and in Q3 we informed ISPs of another 99 associated URLs that were subsequently blocked. We are now working on a further order that we expect to be obtained in late 2022. In Malaysia, CAP continued to block on a regular basis, and we added members to the blocking list that greatly expanded the footprint of sites that can be blocked, with 70 sites being referred in one round alone in Q3.

2022 also saw the successful conclusion of a CAP led action with New Zealand and Australian partners against a New Zealand based ISD seller with the operator effectively shutting down their operations.

ENGAGEMENT & OUTREACH

Following YouGov's identification of social media platforms as a key source of accessing pirated content, in 2022 CAP cranked up its engagement with the two biggest technology companies in this space, Google and Meta. CAP has regular calls with each company and in 2022 we instituted roundtables with each with CAP Steering Committee members. The roundtables were very well attended and both were highly effective. For Google we are now exploring their offer of CAP acting as a Trusted Copyright Removal Program (TCRP) facilitator on behalf of CAP members who don't hit the necessary thresholds for that service themselves. For Meta, CAP in 2022 began referring sites that we have had blocked around the APAC region, for removal from all Meta platforms (Facebook, Messenger and Instagram). CAP are the only non-government organisation that receive this service.

And speaking of government, the easing of COVID restrictions allowed CAP to have face to face meetings with numerous government officials around the region. In Q2 we organised a meeting in Singapore with CAP members and Kominfo, the result of which was the highly successful IP blocking trial. As a longer term goal, CAP are also working with Kominfo on an MOU that would allow for the blocking of sites based on copyright alone in Indonesia.

In Q2 CAP also met with Astro and MDTCA in Malaysia to discuss our site blocking program there. In Q3 CAP picked things up in the Philippines following the July introduction to the House of a Revised IP Code that included site blocking provisions. In August CAP made an out of cycle submission on the Bill, and we followed this in hosting a Digital Piracy Summit in Manila in September, made possible with the support of Globe. We invited Congressman Salceda, who presented the Bill, to provide the keynote for the Summit, and we subsequently met separately with him and Globe later in the month to discuss the key components of an efficient and effective site blocking regime.

Another key speaker at the Manila Summit was Mr Ita Choi, the Executive Director of Korea's Copyright Overseas Promotion Association (COA). COA represent the Korean broadcasters and our developing relationship with such a key strategic partner has been one of our highlights in 2022. MDTCA also spoke at the event.

CONCLUSION

He was onto something, that Machiavelli. In 2022 CAP reviewed its operational history, identified its strengths and weaknesses, and pushed forward. That included: revising our YouGov surveys to be undertaken annually across the board; a top to bottom restructuring of our online platform resulting in MagiCAP 2.0; greatly enhancing our relationships with the tech giants Google and Meta; pushing the boundaries of our site blocking efforts with a move to IP blocking in Indonesia, our biggest site blocking order in Singapore, greatly expanding our footprint of sites to be blocked in Malaysia, and finally, an all court press pushing for an efficient and effective site blocking regime in the Philippines. As the world continues to emerge from its post-COVID funk, CAP are eagerly looking forward to striving for constant success via changing times in 2023. ■

by Matthew Cheetham
General Manager, Coalition Against Piracy

Baker McKenzie.

MEASURES TO COMBAT ONLINE PIRACY IN ASIA PACIFIC:

RECENT DEVELOPMENTS

Notwithstanding the increased volume of legitimate content available through Over-The-Top (OTT) streaming services, the prevalence of online piracy remains a huge threat to content rights holders globally.

Against the surge in consumption of illegal content, countries across the Asia Pacific region (APAC) have recognised the importance of using their legal and regulatory frameworks to combat online piracy. This article provides a brief overview of the recent regional developments.

1. SINGAPORE

In response to feedback regarding the difficulty of using previous legislation to enforce their rights against sellers of hardware devices, software applications and services that facilitate access to unauthorised content, the Singapore Copyright Act 2021 now imposes civil and criminal liability on commercial dealers of such devices and services.

The new provisions are technologically neutral and broad enough to cover other types of content such as books and songs, and other methods such as offering of services to install applications on existing hardware.

The change targets people who commercially profit off hardware, software and services that only have a limited commercially significant purpose or use, other than to facilitate access to copyright works communicated to the public without the authority of copyright owners. They do not impose liability on consumers and users of the hardware devices, software applications or services.

2. MALAYSIA

The Malaysia Copyright (Amendment) Act 2022, effective since 18 March 2022, has created new offences for:

a. Committing or facilitating copyright infringement by:
   - manufacturing, importing, selling, letting for hire, distributing and/or offering any streaming technology; and/or
   - offering or providing any service of streaming technology;

b. Intentionally causing any evidence in relation to the commission of an offence to disappear, or knowingly giving false information; and/or

c. Sharing infringing access to online location of any works or copies of works online.

The new Act also strengthens enforcement powers for copyright-related offences, now allowing search and seizure of any infringing copy by the Assistant Controller or police, even without any application by the copyright owner.

The Assistant Controller can also now direct the copyright owner (or an authorised person) to make a test purchase of any goods to determine whether the new Act has been complied with; and to direct the provision of information or document in the course of an investigation under the Act.

3. INDONESIA

Although there has been no further amendment made to the Indonesia Copyright Act after its enactment in 2014 and the Information and Electronic Transaction Act after its last revision in 2016, Indonesia has seen a significant 75% reduction in traffic to pirate sites as of January 2022, since site-blocking began in mid-2019. As of April 2022, more than 3,500 domain names have been added to the local blacklist. However, in 2022 Special 301 Report of the United States Trade Representative, Indonesia is still included in the Priority Watch List, as rights owners continue to report notable levels of piracy through illicit streaming devices (ISDs) and illicit Internet Protocol Television (IPTV), as well as unauthorized camcording and unlicensed use of software.

4. PHILIPPINES

The Philippine Online Infringement Bill, first proposed in 2019, is still pending approval. If enacted, this will enable the Philippines Intellectual Property Office to revoke licenses of Internet Service Providers (ISPs) that allow pirate websites to circulate unauthorised content.

The Philippines has also joined the growing list of countries to implement site-blocking measures (albeit without oversight from the Courts in this case). The voluntary agreement saw the Philippines IPO, the National Telecommunications Commission and the country's ISPs collaborate to block pirates in a streamlined fashion.

These developments are significant since the local level of piracy has recently overtaken that of Malaysia and Indonesia. In 2022 alone, 61% of consumers admitted to accessing pirated content, an increase from 49% in 2020. Amongst those who frequent pirate sites, 47% have cancelled their subscriptions to legitimate local and international content services.

5. THAILAND

The Thai Copyright Act (No. 5) B.E. 2565 2022, effective from 23 August 2022, provides for a new takedown procedure that allows copyright owners to use a takedown notice (instead of a Court order) to start the takedown process.

Baker McKenzie.

Certain types of "service provider[s]" – which now covers intermediary service, caching service, hosting service and information location tools service – are presumed to be exempt from liability if 2 conditions are satisfied:

a. An explicit announcement and actual compliance of service-terminating measures have been made; and

b. Compliance with the statutory conditions provided for each type of service provider.

For hosting service and information location tools services, the amended Copyright Act introduces a new notice and take down procedure allowing copyright owners to issue a copyright infringement notice to such service providers and counter-claims against such notice.

6. CHINA

China's Third Amendment of Copyright Law (**"Third Amendment"**), effective since 1 June 2021, is a major reform in response to the increasing number of copyright infringement lawsuits in China, including cases of digital piracy.

Some key highlights below:

- In response to previous criticisms relating to the assessment of damages, new legislation has increased the amount of statutory damages payable within the range of CNY 500 (USD 77) to CNY 5 million (around USD 770,000) and introduced punitive damages consistent with its trade marks and patent laws. Where appropriate, punitive damages of up to 5 times the determined damages may be awarded.
- Copyright authorities can also impose fines on infringers proportionate to the illegal business turnover; conduct investigations; and seize suspected infringing articles.

7. HONG KONG

The Hong Kong Copyright (Amendment) Bill 2022 has been gazetted. If enacted, it will introduce an exclusive technology-neutral communication right for copyright owners and criminal sanctions against infringement relating to the new communication right. It also will introduce two additional statutory factors for the court to consider when assessing whether to award additional damages to copyright owners in civil cases involving copyright infringements that will to help deter infringement.

The Bill also introduces "safe harbour" provisions for online service providers to protect their activities and incentivise them to cooperate with copyright owners in combatting online piracy.

COMMENTARY

The rapid development of copyright laws across the region recognises the need for better and smarter regulations to guard against the misappropriation of content by bad actors.

While the industry cannot solely depend on existing laws and regulations to catch up with rapidly evolving technology, the increased amount of effective site-blocking in a number of countries and updated copyright laws across the region show a greater awareness of these issues among governments. For example, YouGov surveys in Malaysia show that consumers move away from piracy when faced with site-blocking pages. Indonesia too, has seen a downward trajectory of streaming piracy since the introduction of its site-blocking regime.

Nonetheless, as technology continues to march forward and more content continues to be pirated before it is even released, an effective strategy to reduce theft and combat piracy in APAC can only be achieved through consistent enforcement, disruption and consumer education and outreach. ■

by Andy Leck
Head of the Intellectual Property and
Technology Practice Group in Singapore, Baker McKenzie

We at ***Baker McKenzie*** *appreciate the challenges of staying innovative and profitable in an increasingly regulated global landscape. Working across borders, our Media and Entertainment practice brings together intellectual property and technology specialists to advise on a wide range of complex cross-border matters to help clients keep the show on the road. We advise on all aspects of intellectual property in the media and entertainment space, including development agreements, brand strategy, designs and complex copyright questions associated with moral rights, content production, distribution and transactions.*

Synamedia

LEGISLATION SHOULD KEEP PACE WITH TECHNOLOGY **TO STOP STREAMING PIRATES IN THEIR TRACKS**

What's the link between streaming piracy and seatbelts? The answer is legislation.

In countries where seatbelt use is required by law, the reduction in car crash fatalities is dramatic. Likewise, we at Synamedia believe that governmental legislation and the enforcement of anti-piracy regulations will result in a significant reduction in the number of incidents and risks from streaming piracy.

Undermining the ecosystem of the media and entertainment industry, streaming piracy continues its sky-rocketing trajectory. The financial rewards on offer and the relative ease of setting-up an illegal operation, combined with the low risk of arrest or meaningful punishment, means that video streaming pirates are continually on the look-out for more ways to monetize their illegal distribution of content.

Keeping one step ahead of piracy requires collaboration across the entire video distribution chain.

On the one hand, adopting both protective and proactive approaches to detect, disrupt and deter piracy is paramount. For example, employing OTT protection, encryption, forensic watermarking and other technologies to ensure that only legitimate subscribers and applications are granted authorised access to content.

On the other hand, we need collaboration among content owners, legislators and law enforcement authorities to gather the evidence required to orchestrate technical and legal takedowns. The effectiveness of this approach has already been proven. For example, in the EU, the UK, Brazil and Southeast Asia, we work with Interpol and local law enforcement agencies to develop training materials and evidence-gathering guidelines to support local enforcement activities.

LEGAL LIMITATIONS

Content owners can fight streaming pirates by issuing takedown notices once piracy has been detected, and by asking courts for blocking injunctions. In addition to progress in taking down illegal streams on social media platforms, new techniques such as dynamic IP blocking are beginning to play their part.

The existing worldwide legal framework offers only a partial solution for the protection of digital property. Internet service providers (ISPs) are not always obliged to comply with takedown notices. If they do comply, there are often varying interpretations of what constitutes 'expeditious' action, and when it comes to removing infringing content during sporting events, current standards are typically not 'expeditious' enough.

There is no legal path to complement existing technological capabilities to tackle the threat of piracy in real time, and stop the distribution of stolen digital content as it is discovered, without enlisting the help of an external enforcement authority. For example, protecting sports and live events means applying to the court for a dynamic blocking order. Such a court order allows a content owner to notify ISPs, in advance, that they must block access of URLs providing access to websites that are subject to the main court order. However, these measures are still not widely deployed.

RETHINKING LEGISLATION

We need to update current legislation to address ongoing and repeated real-time infringements by pirates. In essence, rights holders should be able to counterstrike against streaming pirates who illicitly distribute unlicensed content. In street crime, using reasonable force to fight back is 'self-defence' and permissible by law. We believe the law should support this in the virtual space too.

The tech industry is already in a position to do this by integrating the existing technology solutions and capabilities that detect the stolen content and disrupt its distribution, without violating pirates' assets or privacy. As technology moves faster than legislation, the law needs to be future-proofed to address techniques pirates deploy, and enforcement agencies should be empowered for compliance.

It's time for legislators to buckle up, rev up the self-defence legislation engine and force the pirates off the road, into the ditch. ■

by Miri Naor Elias
Intelligence and Security Senior Legal Advisor, Synamedia

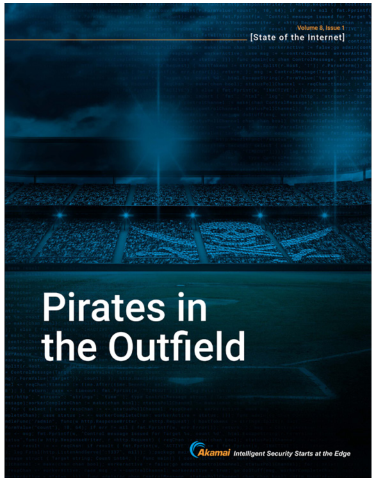
***SYNAMEDIA** protects approximately $70 billion in operator revenues every year with its unrivalled intelligence-based approach, leveraging AI technologies alongside human intelligence to monitor and map the piracy supply chain. With 30 years' experience in video security, Synamedia developed the longest unhacked solution on the market, while its operational security team has brought many criminals to the attention of law enforcement officials.*

SECURING THE FUTURE
OF ASIA'S MEDIA & ENTERTAINMENT INDUSTRY

Global piracy has undoubtedly grown over the last two years of the pandemic. It is estimated to cost TV and movie providers almost USD$52 billion in revenue worldwide in 2022, according to Online TV Piracy Forecasts.

This is not surprising, given rising demand for online content created by pandemic-induced social restrictions, and the reduction of purchasing power which has resulted in some consumers seeking illegal streaming options for content.

According to Akamai's latest State of the Internet / Security report, global piracy demand* reached 3.7 billion unlicensed streams and downloads between January and September 2021.



There were also 82 billion visits to television and film industry-related piracy websites between January and September 2021, with the United States (13.5 billion), Russia (7.2 billion), India (6.5 billion), China (5.9 billion), and Brazil (4.5 billion) as the top five locations for piracy website visits.

In Asia Pacific, where the online video industry is expected to grow at an 8% CAGR to reach USD72.7 billion in 2027, and the total addressable market continues to expand with 78% of the population (excluding China) accessing 4G, 5G and fibre-enabled connectivity in 2022, piracy remains a pervasive issue that cannot remain unchecked.

PIRACY EXPOSES BOTH MEDIA COMPANIES AND CONSUMERS TO BAD ACTORS

Beyond the legal implications and financial losses for content providers, piracy also exposes consumers to malicious content, from phishing, malware, and exploits to botnets, ransomware attacks, and identity theft. Over 90% of illicit streaming sites detected by our Managed Content Protection service were found to contain this type of content, posing a real threat to users and streaming providers alike.

Beyond that, many motivated threat actors leverage the illicit lure of pirated content as a passive delivery vehicle for targeted attacks, including credential and PII (personal identifiable Information) theft via spear phishing, malware, and botnet aggregation.

This begs the question: how then can businesses stay at the top of their game?

DEVELOPING 360-DEGREE AWARENESS TO THWART PIRACY ATTACKS

The only way that content providers can effectively prevent piracy from making an impact is to identify and mitigate broadcast layer piracy in near-real time. Solutions like Akamai's Managed Content Protection (MCP) service which is delivered by Akamai experts in the media Broadcast Operations Command Center (BOCC) serve as a first line of defence to monitor, automatically detect, analyse and mitigate piracy threats in real-time to stop them in their tracks.

Another important mitigating effort to consider is how to convert users of piracy sites into paying subscribers. For example, by terminating unauthorized access with content protection services in near-real time can be a way to push potential viewers of pirated content to pursue legal means of access.

Tapping onto content protection services is also a good way to mitigate such issues – as it enables the collection of business intelligence which can help organizations understand consumption patterns and thereafter, identify the right content strategies to reach customers and nurture a legitimate audience.

Additionally, the role of consumer education cannot be overstated. Not only does this encompass awareness around the consequences of piracy, but also education around how they can safely and legally obtain access.

According to Akamai's findings, we also found that a top reason for consumers turning to pirated content is the unavailability of content in their markets. Thus, ensuring availability, and communicating this to consumers will be key, to cut the problem off at the source.

NAVIGATING A PIRACY-FREE FUTURE

Piracy is, indeed, an ongoing battle, and there is no silver bullet to address this pervasive issue.

The only way that industry players can stay ahead is to continually evolve security measures and be diligent in using solutions that block piracy and protect their intellectual property to ensure their continued growth. ■

by Dean Houari
Director of Security Technology and Strategy – APJ
Akamai Technlogies

***AKAMAI** powers and protects life online. Leading companies choose Akamai to build, deliver, and secure digital experiences. With the most distributed compute platform — cloud to edge — customers can build modern apps while keeping experiences closer to users and threats farther away. Learn about Akamai's security, compute, and delivery solutions at akamai.com.*

** Measured by visits to websites offering access to movies and television shows, either directly through a browser or mobile application, as well as torrent downloads.*

irdeto

SECURING YOUR CONTENT AGAINST PIRATES

Streaming piracy is on the rise and attacks on OTT infrastructure have become increasingly sophisticated. Pirates never cease searching for ways to take advantage of platform vulnerabilities. As the leaders in cybersecurity, we have identified the following latest trends.

USING VPNS AND PROXIES TO CIRCUMVENT GEO-RESTRICTIONS

Pirates use VPNs and proxies to go around the geo-restrictions which are common in the media industry. Geo-restrictions are in place because content rights are traditionally acquired on a region-by-region basis, and consumption of this content is restricted by the location of the viewer. Geo-blocking is the mechanism used to manage the access to video content based upon the user's geographical location. Geo-blocking is made possible thanks to IP addresses that function as geographical identifiers. ISPs operate in specific regions and therefore the range of IP addresses provide this geographical identifier. The ISPs in turn assign an IP address to their (consumer) customers' devices that are connected to the internet. The OTT service provider will check the IP address of the user's device to ensure that it has the rights to show the content requested by the user.

By using VPNs and proxy servers, users can "disguise" their location by directing the internet traffic (and encrypting the communications in the case of a VPN) through servers hosted in various parts of the world. This means that a consumer could gain access to content in a location where the provider does not have the rights to offer the content. Because VPN and proxy servers are constantly adapting and new ones appear in the market, it can be challenging for an OTT provider to maintain a blacklist of the IP addresses of the VPN and proxy servers. This process drastically reduces the speed through which you would consume content. A proxy (or more specifically a proxy server) on the other hand works similarly to VPNs but without the encryption. This still allows users to access geo-blocked websites without negatively affecting speed or performance but at the cost of reduced security due to the unencrypted communications.

Irdeto Control, Irdeto's multi-Digital Rights Management (DRM) offering, provides a geo enforcement service that is easy to use and maximizes the effects of geo-blocking in the fight against piracy. It leverages professional, studio-approved geo-IP & VPN/proxy databases. These databases are frequently updated to cover any changes in IP-to-geo location mappings and address new VPN/proxy trends and classifications. In addition, the geo-enforcement service provides streaming services the flexibility to enforce geo-restrictions based on content and/or a subscriber's country, region or city location while ensuring tools such as VPN/proxy don't allow circumvention of these geo-restrictions.

STEALING AND SHARING SUBSCRIBER SESSION TOKENS

"Session token sharing" is trending. In short, pirates are stealing and reusing session tokens from legitimate customers to offer their services. A session token is a representation of a subscriber's authentication and usage rights and is tamper proof. Tokens are signed credentials encoded into a long string of characters created by a server. When web browsing, tokens are used to authenticate and indicate the rights of the user to access the website. When persisted, tokens allow the user to access the service without authentication (until the validity period of the token expires). Issues arise if these tokens get compromised. When this happens, the user of the compromised token can act as a legitimate user and access all the privileges of the legitimate user.

From the perspective of a streaming service, it is critical to determine if a token is stolen and shared by a pirate. The users of the pirate service can access the content pretending to be paying customers, leading to revenue loss while also incurring cost to serve these pirate customers. Irdeto Control's DRM-based Concurrent Stream Management (CSM) technology is an effective mechanism to address session sharing piracy. When combined with best practices, such as short duration session token, the

maximum number of devices which can leverage a stolen/compromised token can be restricted, thereby effectively knocking out the attempts of pirates to use this piracy technique to offer services across their wider base.

Irdeto Control's CSM offers a host of benefits: (1) eliminate the risk of increased cost to support piracy service customers, (2) avoid the risk of overloading CDN (Content Delivery Network) during high profile events due to illegitimate streaming, (3) maintain full monetization of value-added services, and (4) reduce potential loss of new subscriber revenue.

TARGETING SECURITY VULNERABILITIES AND EXTRACTING CONTENT KEYS

As many will no doubt know, not a day goes by without mentioning how either AI and/or ML will help consumers, governments and companies solve complex problems. To detect attacks quickly, the use of tools such as AI and ML are essential, complimented by a broad team of analysts and investigators.

The security of content is only as good as the tools, technologies, and teams you use. At Irdeto, the primary goal with this service is to detect suspicious user activities using multiple deep learning algorithms and review these using a team of cybersecurity analysts and investigators. Finally, the ability to scale up the solution to handle data volumes during high profile events is essential.

END-TO-END SECURITY IS KEY

These are just some of the ways pirates steal content and hurt valuable revenue. Protecting your content requires an end-to-end suite of products and services that match your specific needs and a security partner who works with you to target and address specific threats. ■

by Mark Mulready
Vice President – Cyber Services, Irdeto

***IRDETO** is the world leader in digital platform cybersecurity, empowering businesses to innovate for a secure, connected future. Building on over 50 years of expertise in security, Irdeto's services and solutions protect revenue, enable growth and fight cybercrime in video entertainment, video games, and connected industries including transport, health and infrastructure. Irdeto is the preferred security partner to empower a secure world where people can connect with confidence.*

NAGRA KUDELSKI

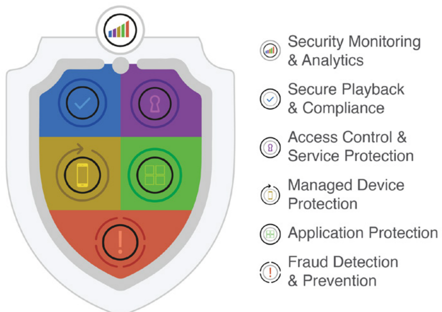
YOU KNOW THERE'S A PIRACY PROBLEM.

HOW BIG IS IT, WHERE IS THE MAIN THREAT AND WHAT'S THE BEST WAY TO REACT?

Piracy is omnipresent in our industry today. A lot is written about the size of the problem and how we, as an industry need to deal with it. But let's take a step back. How do you quantify the size of the problem, the size of the threat and how can you pro-actively mitigate against it in the first place?

Excellent intelligence is the key to any anti-piracy approach. Clear, unambiguous data not only allows anti-piracy teams to track the threat but also reveal the ecosystem in which it resides. At NAGRA, our Anti-Piracy Intelligence teams continually scan the web for threats, building one of the largest case books in the industry today. For our video service customers, we routinely sweep their networks to identify the scale of the problem and align the results with our case files to zoom in on the significant threats. With threats identified, it then comes down to inter-relationships between the pirate organizations and this ecosystem view allows organizations to identify the best targets to focus on. With threats identified and the ecosystem understood, it's then time to work with our law enforcement and other coalition partners to take direct action on behalf of our customers. Operation 404.4 in Brazil where NAGRA contributed intelligence-led evidence to several successful raids as part of an operation with Alianza, that is equivalent to AVIA's Coalition Against Piracy (CAP) in Asia Pacific and is a great example of all these pieces working together.

However, what about the steps required to prevent piracy in the first place? As part of a good content and service protection strategy, several tools and technologies are required to all work together to monitor the impact of streaming piracy. Having a framework of services to call upon, such as NAGRA Active Streaming Protection, means all touch points can be secured – critical given the disparate nature of OTT ecosystems. For example, multi-DRM (Digital Rights Management) may secure content, but threats remain at a Content Delivery Network (CDN) level where pirates are known to access content for their own illicit gains. Server-side watermarking at the CDN edge can work alongside multi-DRM to



watermark content and provide leak detection. When further tools are added, such as identifying subscribers using fraudulent credentials, a fuller security view emerges. The results of multiple solutions working together are then shown through centralized security monitoring and analytics dashboards allowing the size of the piracy threat to be quantified. This holistic approach to content and service protection allows operators to turn parts of their business previously considered cost centers into profit centers as piracy threats are quantified and clear remedial actions identified.

If you're considering your next move in tackling pay TV or streaming piracy, why not have a conversation with the NAGRA Anti-Piracy teams as a next step? With 25+ years of experience gathering piracy intelligence across different types of networks, building complex ecosystem views to aid investigations, and working with customers around the world to deploy pro-active solutions, their help is just a click away. ■

by Tim Pearson
Vice President, Solution Marketing, NAGRA

***NAGRA** the digital TV division of the Kudelski Group (SIX:KUD.S), provides security and multiscreen user experience solutions for the monetization of digital media. The company provides content providers and DTV operators worldwide with secure, open and integrated platforms and applications over broadcast, broadband and mobile platforms, enabling compelling and personalized viewing experiences. Please visit dtv.nagra.com for more information and follow us on Twitter at @nagrakudelski.*

SIPI
An Authentix Company

REIGNING IN "INFLUENCER COUNTERFEITING"

Partnerships between major brands and social media influencers are today de rigueur. Worryingly, however, the rise of influencer marketing has been accompanied by an unseemly trend of "influencer counterfeiting", where a minority of unscrupulous influencers blatantly hawk fake goods on the internet.

A recent survey, commissioned by the UK Intellectual Property Office and conducted by the University of Portsmouth, found that "deviant" social media influencers exert a significant influence on young followers, stating a host of alarming statistics.

While a reasonable amount of media coverage has been devoted to the trend of influencer counterfeiting, what is sometimes missed is that levels of respect for intellectual property can vary across social media platforms.

For example, Meta appears to have a fairly robust complaints mechanism, with approximately 80 percent of counterfeit-related complaint resulting in takedowns (per its transparency reports). Meta has also partnered with well-known brands and initiated legal action against counterfeiters (including, in one instance, a lawsuit jointly filed with Gucci in a US court). The same, however, is arguably less true for TikTok and its Chinese equivalent Douyin. Media reports, and SIPI's own enforcement experience, suggests that the extent of influencer counterfeiting on the platform is widespread and responses to takedown requests need to be improved. This also holds true for Telegram. Compounding the problem, Telegram offers users significant anonymity, thus potentially allowing rogue influencers to hide behind false identities and also evade offline enforcement actions.

Judicial precedents concerning influencer counterfeiting, and the obligations of social media platforms, remain few and far between. Last year, Amazon sued two influencers active on TikTok, Facebook and Instagram in the US, for allegedly working with a large network of counterfeiters to advertise and facilitate the sale of fake luxury products. The case, however, was ultimately settled on confidential terms. In June 2022, Amazon and Cartier partnered to sue an influencer selling fake jewellery on Instagram.
In contrast with the earlier case, the identity of the influencer was unknown and identified in court filings only by the handle "Phym9y3v". While the outcome of the case is eagerly awaited, a very recent precedent from the Delhi High Court in India is instructive. An English-language tutor, whose lectures and course materials were being uploaded and sold on Telegram without her permission, sued Telegram for copyright infringement. The plaintiff observed that she had sent takedown requests to Telegram, but new

channels with the infringing content were popping up as soon as one was disabled. Telegram contested the application on the ground that it was an intermediary and that its servers were located overseas, beyond the jurisdiction of Indian courts. The court rejected Telegram's arguments, observing that "conventional concepts of territoriality no longer exist" and that copyright enforcement "cannot be diminished merely due to the growth of technology, which has made it easier to hide and conceal illegal activities." The court thus directed Telegram to disclose the mobile numbers, IP addresses and email addresses used to upload and disseminate the content, along with details of the servers and networks used.

The increase in influencer counterfeiting requires brand owners to pursue rogue influencers (both online and offline) and press for myriad forms of legislative intervention and diplomatic pressure, to truly reign in influencer counterfeiting and the platforms that facilitate it. ■

by Bharat Kapoor
VP of Online Brand Protection, Authentix

A subsidiary of Authentix Inc, the global authority in authentication with a wide range of authentication and traceability technologies, **STRATEGIC IP INFORMATION** *("SIPI") provides anti-piracy & online brand protection services to fight counterfeiting, grey market sales and other unfair business practices.*

TVB

BRINGING TECHNOLOGY TO THE FIGHT AGAINST PIRACY

As a broadcaster of TV content, TVB has observed the rising trend of IP infringement by online platforms in Asia. While site blocking and takedown approaches are effective means to tackle online piracy, it is highly labour intensive and time consuming to identify the infringing domain names and pirated links. As such, DfoDeca Limited, a subsidiary of TVB, has developed an AI system that can automatically identify infringing websites and detect pirated links.

To detect domain names of infringing websites, it is a usual practice to search content titles by search engines to identify the domain names of pirated websites. Then, the traffic going to the identified domain names is used to signify the piracy impact of these websites. However, in our our perspective, the number of infringing title links is more important than website traffic in reflecting the piracy impact of the website. Take for example, comparing a website with 100,000 daily visits with only one pirated title link to another website with only 30,000 daily visits but with fifty pirated title links. It is obvious that the low traffic website with more pirated title links has greater piracy impact than the website with higher traffic.

Based on the above-mentioned notion, we have developed a proprietary system, the Copyright Landscape System (CPLS), to automatically identify infringing websites and gather the pirated title links from these websites. Based on the AI algorithm, the CPLS can identify infringing websites automatically and gather the pirated URL links from the detected websites. The CPLS is designed to deliver:

a. Overall information, including infringing websites and number of links in different countries, pirated links of each title, etc. for decision making and marketing strategy;

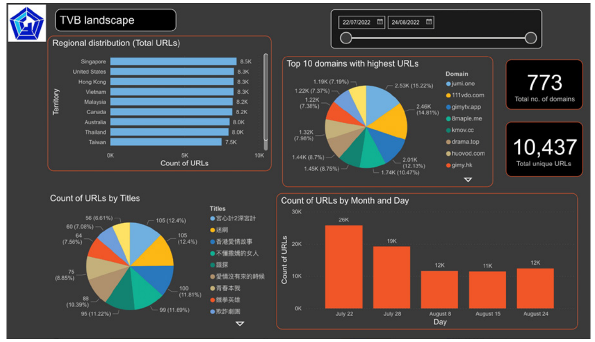
b. detailed information of detected websites and links, such as domain registrant, IP address, title links on each website, etc. for investigation purpose;

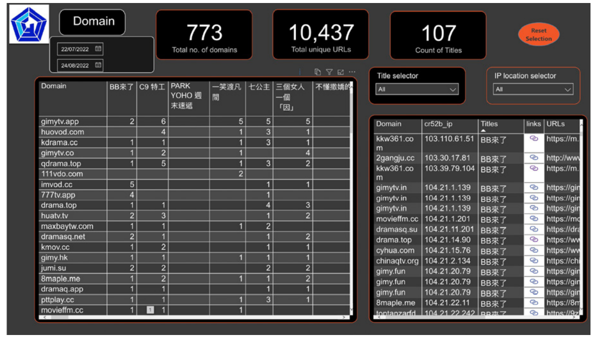
c. de-duplicated title links for takedown purpose; and

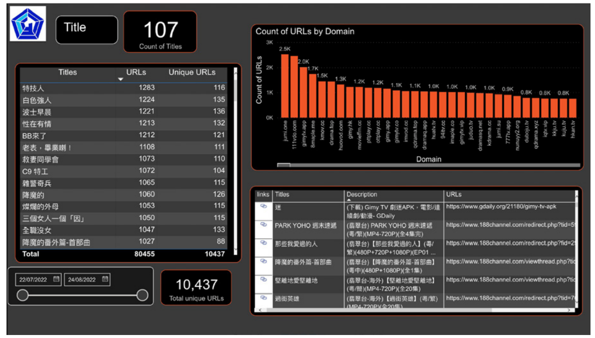
d. report of (a), (b) and (c) daily or any other time frame during the monitoring period.

To demonstrate the functionality of the CPLS, we have used 107 titles, which are popular TVB episodes from the past 2 years. These 107 titles are used as input to the CPLS. We have also selected 10 countries, from which the CPLS would search for infringing websites and pirated links. As a result, the CPLS identified a total of 80,455 pirated links of the 107 titles from 773 infringing websites. Given the detected 80,455 pirated links are having many duplications, the CPLS can further identify 10,437 unique links from the 80,455 links. Takedown notifications were then sent to Google and 773 websites automatically by the CPLS. Here are the screenshots of the CPLS in action.

With the proliferation of online piracy, it is not feasible to use traditional or manual methods to detect and identify large amounts of infringing online platforms and pirated links any longer. Today, we need to use technological measures to tackle the challenges expeditiously and effectively. ■







by Michael Kwan
Senior IP Enforcement Adviser, TVBI

Established in 1976, ***TVB INTERNATIONAL*** *("TVBI") is the worldwide operating arm of TVB, supplying quality TV programmes to free-to-air broadcasters, cable and satellite services operators, and licensed video and DVD/VCD distributors throughout North and South America, Europe and the Asia Pacific region. TVBI has also been playing an active role in the development of emerging digital media.*

viaccess·orca

STRATEGIES FOR RAMPING UP ANTI-PIRACY EFFICIENCY

According to a recent survey by Streaming Media, the average streaming video content publisher loses 20% of potential revenue to piracy. With the volume in video piracy cases growing at an alarming rate, pay TV operators need better ways to fight against threats.

There is no silver bullet for fighting piracy; however, a holistic anti-piracy solution with innovative technologies can help operators combat video piracy more efficiently. This article will examine why tools such as automatic detection with human input, machine learning (ML)-based data collection, and dynamic watermarking are imperative.

COMBINING AUTOMATIC DETECTION WITH HUMAN INPUT BOOSTS ANTI-PIRACY EFFICIENCY

Illegal web streaming is one of the top forms of video piracy today. To effectively fight illegal web streaming, operators need an anti-piracy solution that can manage a huge volume of data, quickly detect sources of piracy, and swiftly submit requests to delist content for copyright infringement.

While many anti-piracy solutions use automatic detection tools to identify piracy sources, technology alone is not enough. Piracy detection can be enhanced with human input. For example, it has been shown that the human eye is superior at detecting typos and voluntary letter swap than an automated detection tool. Combining the strengths of automatic detection and human monitoring is an excellent way to drive efficiency when combatting illegal web streaming.

MACHINE LEARNING IS CRUCIAL FOR DATA COLLECTION

The number of illegal IPTV networks has boomed over the past few years and is a significant problem for the live sports video industry. To fight piracy on illegal IPTV networks, operators must effectively manage a massive volume of data. Data collection and analysis aids operators to quickly identify and accurately label pirate websites selling accounts of those IPTV services. Analysing the sites give operators insights on the most used IPTV services in their broadcast areas and help them focus on the proper targets.

24/7 web crawling, real-time automated monitoring, and ML data collection are powerful technologies that operators can use to act faster and improve the identification of illegal IPTV networks. With ML, operators can constantly improve data labeling, manage a significant amount of data, and ensure data is always up to date.

DYNAMIC WATERMARKING IS A MUST FOR LIVE EVENTS

Dynamic video watermarking technology enables operators and content owners to fight illegal live streaming faster than ever. By employing a unique, top-down approach that supports client-side, server-side, and contribution use cases, the technology allows operators to protect content on broadcast, IPTV, and OTT networks. After identifying the source of piracy, the content owner or TV operator can then take down the source, which is especially critical for live sports and events since there is a short window for monetization.

It is important for watermarking technology to be dynamic since piracy techniques are increasingly sophisticated. For example, with collusion attacks, several pirate sources can mix their copies together and retransmit the content as a new blank stream. Dynamic watermarking enables operators to react swiftly to new types of pirate attacks.

NO ONE-SIZE-FITS-ALL APPROACH TO PIRACY

There is no one-size-fits-all approach to fighting piracy. Piracy technologies are constantly changing. Video pirates are getting smarter, and they are using increasingly complex techniques. Operators need to be able to counteract any type or source of video piracy, including piracy on the web, IPTV services, Set-Top Boxes (STBs), and apps.

By embracing a holistic anti-piracy solution and technology innovations such as automatic detection with human input, machine learning for data collection, and dynamic watermarking, operators can drive efficiency and ensure faster remediation to safeguard their brand reputation and revenue stream. ■

by Anne-Sophie Cornet
Product Marketing Manager, Viaccess-Orca

VIACCESS-ORCA *is a leading global solutions provider of OTT and TV platforms, content protection, and advanced data solutions. The company offers an extensive range of innovative, end-to-end, modular solutions for content delivery, protection, discovery, and monetization. With over 20 years of industry leadership, Viaccess-Orca helps content providers and TV operators shape a smarter and safer TV and OTT experience.* www.viaccess-orca.com.

WAGING A WAR ON PIRACY
IN INDONESIA

It is recorded that piracy in Indonesia has slumped since our collaboration with AVIA. These crackdowns are also immensely helped by the government of Indonesia in order to alleviate the piracy problems. Numerous illegal sites have been banned and shut down thus boosting traffic to various legitimate sites. This is a great leap forward since Indonesia is one the most targeted places to be swarmed with pirated content. However, piracy does still exist in Indonesia and it is alive and well. Sadly, there are numerous ways for pirated content to continue circulating across our digital platforms. As part of a growing OTT (Over-The-Top) industry in Indonesia, Vidio has never ceased in its fight against piracy. We have persisted and created a new branch within our legal team focused on eradicating piracy. This is where the Legal and Anti-Piracy Team of Vidio comes into play.

This year, Vidio and AVIA have successfully cooperated to shut down illegal sites. As of August 2022, as many as 265 illegal sites have been reported for blocking and these numbers keep on rising. This achievement is also made possible with the help of the Ministry of Communication and Information Technology of Indonesia (Kominfo), who works tirelessly to block these sites. In addition, the cooperation between Vidio and AVIA has also yielded a new experimental way to block domainless hosted websites which are harder to track and block than the usual websites with domains. If this new method can be proven effective, it will be a major breakthrough in the cause against piracy as these sites are harder to be tracked and taken down with the previous ways.

Furthermore, Vidio has also taken one step further to eliminate these illegal sites by filing a police report on two giant illegal sites popular in Indonesia in July 2022. This means that these reported sites will be checked and inspected further by the police. Indonesia has created a law regarding copyrights which mentions that owners of these malicious sites can be given the penalty of imprisonment and a fine. Adhering with the laws in Indonesia, Vidio has registered Vidio's original series with the Directorate General of Intellectual Property (DJKI) thus enhancing its protection of intellectual property mainly in cinematographic works in Indonesia. This can also help in stopping piracy of these movies as the illegal sites can be brought to court with the help of the certification.

In conclusion, Vidio has embarked on various ways to fight piracy in Indonesia, including cooperating in IP blocking and other blocking methods. At the same time, Vidio has also pursued legal options by handing illegal websites to the police and registering Vidio's original series with DJKI in order to set a precedent of ownership of these cinematographic works to the state. All that aside, there are still lots to be done as the war on piracy will keep on going for years to come. As technology gets more advanced, we have to catch up and possibly outrun them in order to stop these illegal practices. This is why both coalitions by AVIA and the government will always be necessary in order to enhance the process of eradicating piracy in Indonesia. Through our continuous work on combating piracy, Vidio hopes that there will always be a sustained decrease in the number of pirated contents. ■

Vidio's Legal & Anti-Piracy Team Gina Golda Pangaila, Luthfi Rachman and the lawyers handing a report of illegal websites to Banten District Police.

by Gina Golda Pangaila
Vice President, Legal & Anti-Piracy, Vidio

*Founded in 2014, **VIDIO** is the leading OTT (Over the Top) startup in Indonesia, serving millions of video-on-demand for local drama series, catch-up TV and paid-subscription of Indonesian box office hits, including Asian, Korean Drama, Bollywood, and Hollywood, as well as the most varied sports selection on OTT locally. Vidio is committed to providing complete and easy access for users to enjoy entertainment without limitations or device restrictions to be accessed anytime, anywhere.*

whitebullet

STARVING PIRACY OF AD REVENUE REALLY WORKS

IT IS TIME FOR SOUTHEAST ASIA TO BLOCK ADS

The latest data from anti-piracy technology company White Bullet shows the value of advertising on pirate websites is increasing in Southeast Asia, whilst actually decreasing in Europe.

White Bullet's latest research shows that the average estimated ad revenue per ad unit for a piracy website illegally providing access to copyrighted content across **Southeast Asia increased by 20%** in the first half of 2022. Singapore leads, with an increase of 47%, followed by Malaysia with an increase of 18%, meaning pirates are making more money month on month from each ad they can attract to their websites. By contrast, the average estimated ad revenue per ad unit for a piracy website in **Europe decreased by 4%**, so pirates are now making less money from each ad across the European continent.

Country/Region	AVG eCPM change Jan22 - Jun22
Singapore	**47%**
Malaysia	**18%**
Philippines	3%
Vietnam	2%
Indonesia	-3%
Hong Kong	-4%
Thailand	-6%
Southeast Asia	**20%**
Europe	-4%

White Bullet Intellectual Property Infringement Platform data

HOW DOES WHITE BULLET DO THIS?

White Bullet uses its technology to detect and risk score piracy websites and apps and then continually tracks the advertising funding them. White Bullet uses its proprietary advertising valuation algorithm to calculate the estimated advertising revenue associated with every thousand ad impressions (or ad views) it derives from ads it has found on pirate websites. This is known as an eCPM and provides the value for each ad unit. It first identifies the digital advertising payment model associated with each ad found - either CPM (display only), CPC (payment per click) or CPA (payment per action) – then calculates a base value for every 1000 ads of this type, and then applies various multipliers to the base value depending on the format, type, sector and display country of the ad. Using this information White Bullet works with rights holders to send notices to the ad industry found supporting piracy websites.

WHY HAS THE AD REVENUE PER AD UNIT FALLEN IN EUROPE AND INCREASED IN SOUTHEAST ASIA?

It is worth first looking at overall ad spend across all websites to determine if these fluctuations apply to the legitimate advertising publisher world. They do not. Leading ad agency, Dentsu, forecasts ad spend in Asia and EMEA (Europe, Middle East and Africa) to reach similar levels of growth (5%-6%) in 2022, with digital ad spend being 55-60% of overall ad spend in both regions. Although not a direct comparison, ad spend can broadly correlate with eCPM values. So, the decrease in Europe and significant increase in Southeast Asia on pirate websites is drastically different to the legitimate publisher ad spend expectations.

White Bullet attributes this positive decline in Europe to the various successful demonetisation efforts undertaken in Europe to defund pirate websites of advertising revenue. Several pioneering strategies have been deployed in Europe by a range of stakeholders, including governmental bodies, industry groups and piracy experts with White Bullet engaged in tracking prior to implementation and post, to determine impact. The European Commission's Memorandum of Understanding on Online Advertising and IPR has seen the ad industry and rights owners come together to share best practices to block ads from pirate websites. Additionally, Project Brand Integrity (PBI) run by the ad industry regulator the Trustworthy Accountability Group has seen outreach across Europe to ad agencies and brands found by White Bullet to be supporting piracy, to raise awareness and demand action. This has seen considerable success with 77% of brands contacted through the PBI programme decreasing their monthly estimated ad impressions on pirate websites. In the UK a joint initiative aimed at tackling gambling ads on piracy websites between The City of London's Police Intellectual Property Crime Unit (PIPCU) and the UK Gambling Commission (UKGC) has seen a 44% reduction in gambling ads appearing on pirate websites. In parallel, in Europe the EU Gambling and Betting Association has actively participated in the Commission's MoU and together with the UK efforts, has resulted in the gambling sector no longer being the dominant sector supporting piracy websites across Europe.

In Southeast Asia such coordinated efforts are yet to be developed. It is worth noting that pirate websites in Southeast Asia attract more ad views than in Europe; the average number of ad impressions per website is two times higher. Worryingly, this means ad supported piracy in Southeast Asia is increasingly attractive for criminals.

WHAT CAN BE DONE IN SOUTHEAST ASIA TO BRING DOWN PIRACY AD REVENUES?

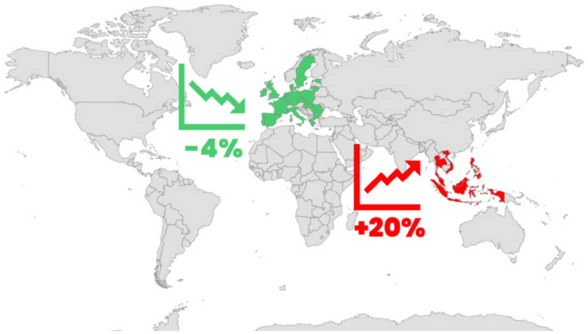
Similar strategies to those implemented in Europe can be adopted in Southeast Asia to reverse the trend of increasing ad value on pirate websites.

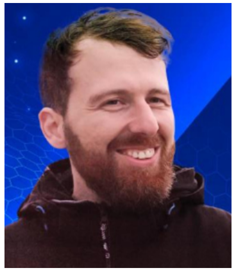
Firstly, a targeted sectoral approach could be key. The Gambling sector is one advertising sector that is ripe for tackling. As previously in Europe, the Gambling sector is the dominant ad sector in Southeast Asia, with gambling brands accounting for 92% of estimated white bullet

branded ad impressions in the first half of 2022. Removing gambling ads from pirate websites alone therefore will have a significant impact on pirate revenues.

Secondly, a broader awareness programme could help brands. Outreach programmes involving notices to brands and ad agencies raise awareness generally to the risks of piracy and can be both national or regional. Brands demand transparency from their ad supply chains but seldom get the levels of transparency data they need – of course it is not in the interest of the supply chain to point out to their clients when they have misplaced ads. So getting data about misplacement means brands not only can take action, blocking future ads, but may be able to demand money back for those ads already misplaced.

Thirdly, ad tech intermediaries should be encouraged to directly integrate anti-piracy tools to block ads in real-time. This is already being done across the industry in other parts of the world. Doing so is not unusual, as the industry already acquires specialist data in other fields, such as terrorism, hate speech, child safety and other dangerous content. It is time the ad industry in Southeast Asia looked at piracy through the same risk lens. ■





by Tom Chytil
Business Intelligence Director, White Bullet

Founded in 2013 by a leadership team of experienced Intellectual Property lawyers from the media and advertising industries, **WHITE BULLET** *offers companies piracy risk data and protection, brand safety solutions, and full transparency on their advertising placement and digital supply chains. With offices in London, New York, and Chicago, White Bullet also advises policymakers and government bodies on regulatory and compliance programs globally.*

RESEARCH INSIGHTS

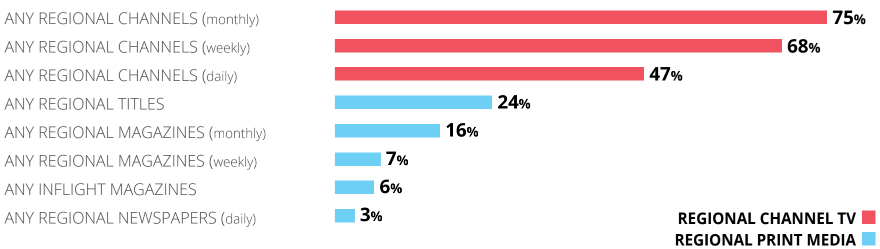
IPSOS AFFLUENT SURVEY AFFLUENT ASIA PACIFIC
Media and Consumer Insights Survey

REGIONAL CHANNEL **TV VIEWERS**

	VIEWED YESTERDAY	NOT VIEWED IN PAST MONTH
INDIA	73%	12%
PHILIPPINES	69%	14%
INDONESIA	62%	20%
MALAYSIA	52%	25%
TAIWAN	51%	21%
SINGAPORE	47%	28%
THAILAND	46%	26%
SOUTH KOREA	43%	23%
CHINA	35%	34%
AUSTRALIA	33%	32%
HONG KONG	33%	36%

Source: Ipsos Affluent Asia Survey H1 2022
Reported markets: Thailand, Hong Kong, Indonesia, Malaysia, The Philippines, Singapore, Taiwan, India, South Korea, Australia, China
Viewed regional TV yesterday and Not viewed any regional TV in past month

REGIONAL CHANNEL TV **CONSUMED MORE THAN OTHER MEDIA**



Source: Ipsos Affluent Asia Survey H1 2022
Reported markets: Thailand, Hong Kong, Indonesia, Malaysia, The Philippines, Singapore, Taiwan, India, South Korea, Australia, China

AFFLUENT VIEWERS **ARE EARLY ADOPTERS...**

OWNERSHIP INDEX	WATCH (REGIONAL TV)		DON'T WATCH (REGIONAL TV)
CAMERA DRONES (FLYING CAMERAS)	**128**	>	61
ELECTRONIC BEAUTY DEVICES (US$200+)	**120**	>	74
VIRTUAL REALITY (VR) HEADSET	**134**	>	60
VOICE COMMAND DEVICE / SMART SPEAKER (E.G. AMAZON ECHO, GOOGLE HOME, ETC.)	**116**	>	76
WIRELESS BLUETOOTH HEADPHONES / SPEAKERS (US$200+)	**118**	>	72

Source: Ipsos Affluent Asia Survey H1 2022
Average Base Index: 100.
Reported markets: Thailand, Hong Kong, Indonesia, Malaysia, The Philippines, Singapore, Taiwan, India, South Korea, Australia, China
Viewed regional channel TV yesterday and Not viewed any regional channel TV in past month

IPSOS AFFLUENT SURVEY ASIA PACIFIC AFFLUENT
Media and Consumer Insights Survey

KEY DECISION MAKERS...

INDEX	WATCH		DON'T WATCH
	REGIONAL TV		
INTEND TO BUY A CAR IN NEXT 12 MONTHS	**115**	>	82
TOP MANAGEMENT	**143**	>	51
OWN BONDS	**121**	>	78
OWN COLLECTIBLES AS AN INVESTMENT (E.G. ART, ANTIQUES, GEMS, ETC.)	**125**	>	77
OWN COMMODITY FUTURES / OPTIONS	**141**	>	51

Source: Ipsos Affluent Asia Survey H1 2022
Average Base Index: 100.
Reported markets: Thailand, Hong Kong, Indonesia, Malaysia, The Philippines, Singapore, Taiwan, India, South Korea, Australia, China
Viewed regional channel TV yesterday and Not viewed any regional channel TV in past month

LUXURY SPENDERS...

INDEX	WATCH		DON'T WATCH
	REGIONAL TV		
OWN QUALITY / DESIGNER ACCESSORIES & FOOTWEAR WORTH US$10,000+	**141**	>	45
OWN JEWELLERY WORTH US$10,000+	**123**	>	67
OWN A LUXURY WATCH WORTH US$10,000+	**125**	>	65
OWN QUALITY / DESIGNER CLOTHES & LEATHER GOODS WORTH US$10,000+	**126**	>	65
CONSUMED BRANDY / COGNAC IN PAST 4 WEEKS	**126**	>	70

Source: Ipsos Affluent Asia Survey H1 2022
Average Base Index: 100.
Reported markets: Thailand, Hong Kong, Indonesia, Malaysia, The Philippines, Singapore, Taiwan, India, South Korea, Australia, China
Viewed regional channel TV yesterday and Not viewed any regional channel TV in past month

IPSOS AFFLUENT SURVEY ASIA PACIFIC
Media and Consumer Insights Survey

THE AFFLUENCERS...

INDEX	WATCH (REGIONAL TV)		DON'T WATCH (REGIONAL TV)
WORKED ON INTERNATIONAL BUSINESS STRATEGIES	**148**	>	51
LOBBIED OR ADVISED MEMBERS OF NATIONAL OR LOCAL GOVERNMENT	**142**	>	66
INVOLVED WITH ENVIRONMENTAL / CONSERVATION GROUP	**137**	>	65
RAISED CAPITAL, INVESTED FUNDS FOR MY COMPANY	**134**	>	61
TAKEN EXECUTIVE DECISIONS WHICH AFFECT ORGANISATION'S OPERATIONS IN OTHER COUNTRIES	**149**	>	44

Source: Ipsos Affluent Asia Survey H1 2022
Average Base Index: 100.
Reported markets: Thailand, Hong Kong, Indonesia, Malaysia, The Philippines, Singapore, Taiwan, India, South Korea, Australia, China
Viewed regional channel TV yesterday and Not viewed any regional channel TV in past month

AFFLUENT VIEWERS STRONGLY AGREE THAT...

INDEX	WATCH (REGIONAL TV)		DON'T WATCH (REGIONAL TV)
PEOPLE OFTEN ASK MY ADVICE ABOUT FASHION AND WHAT THEY SHOULD WEAR	**133**	>	69
I REGULARLY MAKE THE EFFORT TO INVESTIGATE A COMPANY'S ENVIRONMENTAL OR SOCIAL RECORD	**133**	>	64
PEOPLE OFTEN ASK MY ADVICE ABOUT FINANCIAL ISSUES AND INVESTING	**133**	>	68
I AM ALWAYS ONE OF THE FIRST TO HAVE TECHNOLOGICALLY INNOVATIVE PRODUCTS	**130**	>	74
I VALUE THE ELEMENTS OF HIGH QUALITY AND EXCLUSIVITY AS DEMONSTRATED BY LUXURY PRODUCTS	**128**	>	72

Source: Ipsos Affluent Asia Survey H1 2022
Average Base Index: 100.
Reported markets: Thailand, Hong Kong, Indonesia, Malaysia, The Philippines, Singapore, Taiwan, India, South Korea, Australia, China
Viewed regional channel TV yesterday and Not viewed any regional channel TV in past month

NETTING DEFINITION OF **REGIONAL TV CHANNELS**

REGIONAL NEWS

ABC Australia
Al Jazeera English
Arirang TV
BBC World News
Bloomberg
CGTN
CNA
CNBC
CNBC TV 18
CNN
CNN Indonesia
CNN News18
CNN Philippines
Euronews
Fox News
KBS World
Lotus TV
NHK WORLD-Japan
Phoenix Chinese Channel
Phoenix InfoNews
RT Channel
Sky News
TV5Monde

REGIONAL SPORTS

Eurosport
Star Sports 2

REGIONAL DOCUMENTARIES

Animal Planet
BBC Earth
Discovery Channel
Discovery Science Channel
History Channel
Nat. Geo Wild
National Geographic Channel

REGIONAL MOVIE & TV SERIES

AXN Asia
BBC First
HBO
STAR Chinese Movies
Star Movies
StarWorld
tvN
Warner TV

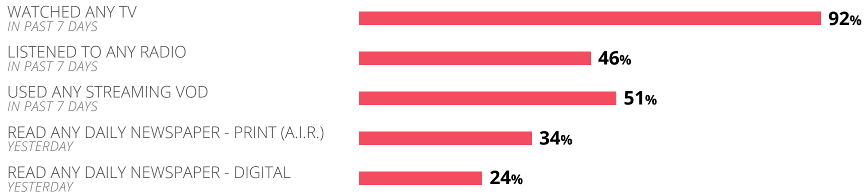
REGIONAL LIFESTYLE

Asian Food Network
BBC Lifestyle
Food Network
HGTV
MTV
TLC

__Ipsos Hong Kong__ began the Affluent Asia tracking survey over 20 years ago because we knew from the beginning the affluent is one of the most sought-after audiences in this fast growing Asia Pacific region. The affluent represents a group of premium consumers who drive spending, take up new technology and experience, and influence on their peers. Media publishers, agencies and advertisers rely on Affluent Asia to analyse their target customers, in order to capture the share of wallet as well as share of mind of this critically important group.

HONG KONG

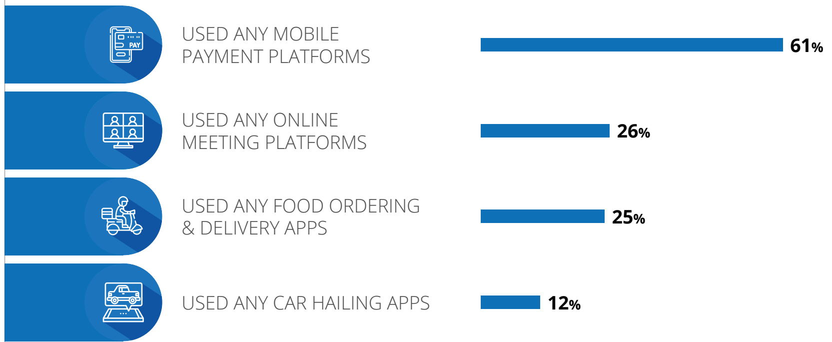
MEDIA CONSUMPTION



Source: Ipsos Media Atlas Q1 2021 – Q4 2021. Reported market: Hong Kong

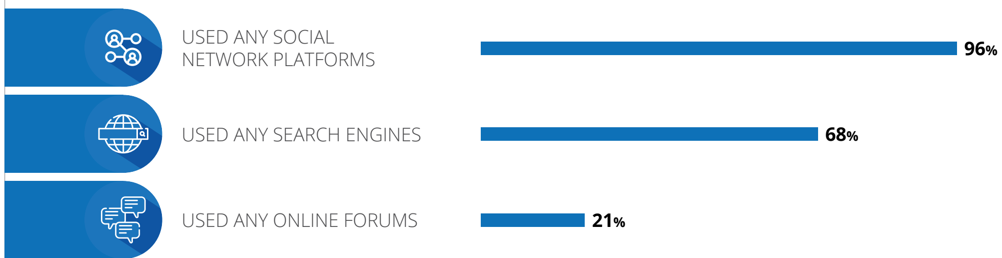
DIGITAL LIFESTYLE

USAGE IN PAST 30 DAYS



Source: Ipsos Media Atlas Q1 2021 – Q4 2021 Reported market: Hong Kong. Usage in the Past 30 Days. Netting of 6 major brands of mobile payment platforms. / Netting of 3 major brands of online meeting platforms. / Netting of 2 major brands of food order & delivery apps. / Netting of 6 major brands of car hailing apps.

USAGE IN PAST 7 DAYS



Source: Ipsos Media Atlas Q1 2021 – Q4 2021 Reported market: Hong Kong. Usage in the Past 7 Days. Netting of 9 major brands of social network platforms. / Netting of 5 major brands of search engines. / Netting of 6 major brands of online forums.

__Ipsos Hong Kong__ began the Media Atlas syndicated survey over 15 years and it has been a barometer of cross-media consumption and people's lifestyle of the city.
More recently Media Atlas has gone through a major overhaul with a renewed focus to serve the print publishers, where many have been extending their presence from paper to the digital space.

Nielsen

ASIA PACIFIC MARKET OVERVIEW

AUSTRALIA

The Internet remains the most used media type in Australia, with Australians averaging 22 hours a week online, an increase from 21 hours last year. Free-To-Air (FTA) television, which held the lead previously, has maintained an average of 18 hours per week since last year.

Mobile phones are remarkably the most common device to access the internet with. This has increased from 39% last year to 44% of Australians who most often access the internet through a mobile phone device. In comparison 14% of Australians mainly go online through their laptop, the second most common device. 70% of Australians access the internet several times a day and 1 in 3 access online while watching TV daily.

Watching videos is the most popular online activity and it is only getting more common – over 2/3 of Australians now consume video content online monthly. Alongside an ever expanding selection of streaming services comes continued growth in Paid Streaming TV. Australians who subscribe to a streaming service grew from 60% to 70% over the year. Netflix sees a recession while still staying on top of the market. Netflix dropped from 72% of Australians who subscribe to streaming services paying for its service to 68%. Binge has seen the biggest growth in recent history with a jump from 8% to 15% this year.

Source: Nielsen Australia CMV

HONG KONG

Hong Kongers' consumption behaviour has changed significantly since the pandemic with reduced time outdoors. At-home entertainment is on the rise and does not appear to be slowing down with 71% of Hong Kongers surfing websites (58% in 2019), 50% listening to music (42% in 2019), 19% playing video games (15% in 2019) and 40% reading books (36% in 2019). There is an increase in using Smartphones (85% vs 82% in 2019) and Tablets (39% vs 33% in 2019) to consume online videos too.

Hong Kong audiences spent more time watching TV programs and streaming videos in 2022 due to social distancing and pandemic control measures imposed by the government. There are 10.1 billion in-home minutes spent streaming, representing 1/5 of all video consumption time in-home, based on a total net reach of 4.6 million Hong Kongers. The average daily share of the video streaming across total video time increased after 9pm and it reached 52% at 3-4am. Nielsen's streaming platform insights also revealed that video streaming platforms accounted for 19.4% of audience total video time. It also provided a view into the broadcast share of audience total video time of 65.4% during the same period.

Sources: Nielsen Hong Kong CMV, & Streaming Insight

INDONESIA

Advertising spend for all media types in Indonesia in H1 2022 vs same period last year showed a modest increase of 7%, mostly driven by an increased rate card of 6% while volume increased by only 1%. 80% of advertising spend is still with linear TV while digital takes up 15%. Advertisers are cautiously confident that among the top 5 biggest category spend, 3 of them still increased spending in the high double digits i.e. Online Service category (e-commerce and tech based companies, +69%), Haircare category (+20%) and Political/Government (+13%). While the two categories that decreased advertising spend i.e. Facial Care and Seasonings/ Condiments, decreased by only single digit of 7% and 2% respectively. It is also interesting to note that FMCG companies still rely heavily on TV while e-commerce companies are much more dominant on digital.

In this COVID recovery period, many companies are showing confidence and starting to launch new variants or brands into the market, which contributed to about 8% of total advertising spend in H1 2022. For comparison purposes, prior to COVID in H1 2019, new launches contributed to 12% of advertising spend. However, the number of new creatives across all media types increased by 40% in H1'22 vs H1'19. This increase is contributed by digital media with numerous short thematic campaigns.

In terms of media penetration, similar to trends in other countries, reach of linear TV is declining while daily internet access is growing significantly driven by various activities including gaming, social media and video streaming especially from mobile. While the time spent on watching TV is pretty stable (4 hours 35 minutes), time spent doing various activities on internet is catching up fast to amount to 4 hours and 37 minutes per day.

Sources: Nielsen Indonesia Ad Intel & CMV

JAPAN

With the removal of restrictions on going out due to COVID, video viewing did not grow significantly compared to last year. However, the users of SVOD services such as Netflix has increased compared to before COVID, and 31% of Internet users use them. This year, for the first time, the number of users of SVOD exceeded the number of users of rental DVD/Blu-ray. In addition, the frequency has also increased, and the number of people who watch at least once a week has increased by more than 20% since 2020 for SVOD and AVOD.

In recent years, more people are watching VOD services on TV screens. People who watch Internet videos on TV screens spend about 30% of their TV viewing time streaming.

Source: Nielsen Japan Digital Panel

MALAYSIA

Overall advertising spend grew +8% for the period Jul '21 – Jun '22 vs. Jul '20 – Jun '21, primarily driven by increases in spend for Digital and FTA TV. Cinema advertising spend revived with the reopening of theatres in the final quarter of 2021,

Nielsen

offering some recovery after 5 months of closures. Meanwhile, like for like radio spend (i.e. excluding newly monitored stations), grew 6%.

Digital featured the highest advertising spend increase (+36%), aligning with public and private sector initiatives to drive digital connectivity by boosting internet usage and reach (+8%) throughout the country. Whilst increased online activities were quickened by the pandemic, the need for immediate information and entertainment have grown internet activities like digital news consumption (+23%), online viewing (+13%), and e-commerce (+25%).

FTA was one of the key reasons for improved advertising spend, with advertisers returning to many established TV channels, as well as sharing their ad-Ringgit with some of the newly launched FTA players. The lifting of movement restrictions and the move to an endemic phase coincided with a slight decrease in TV ratings from 16% to 15%, with viewers spending at least 5 hours watching TV per day. However, there was an uplift in ratings for sports programming (+83%), with local and international fixtures happening, after a year of postponements.

Source: Nielsen Malaysia Ad Intel, CMV & TAM

MYANMAR

Despite numerous challenges brought by the COVID pandemic and political instability within the country, media consumption is still thriving amidst uncertainty.

TV viewing incidence has increased +2% nationwide when compared to 2021. On the contrary, internet usage incidence has declined -4% nationwide when compared to 2021.

Several advertisers have kept advertising their brands mainly on TV. Non-Alcoholic Beverages, Pharmaceuticals, Communications, Personal Care/ Cosmetics and Oral Care categories remain the highest industries by advertising spend.

The rating of TV slightly decreased around -1% in the key 6 cities but the viewing hours remained flat. FTA channels take +90% share of ratings in H1 2022. In light of environmental challenges (e.g. power supply), late night TV's rating increased about +3% in H1 2022.

Source: Nielsen Myanmar Ad Intel, CMV, & TAM

NEW ZEALAND

New Zealand advertising spend in 2021 has shown a solid rebound with a healthy 30% increase compared to 2020, and this is reflected across a range of traditional media (i.e. TV, newspaper, radio, outdoor, and cinema). Digital spend stood out with a 38% year-on-year increase in advertising spend for 2021.

Whilst the first half of 2022 advertising spend has slowed down (-7%) compared to the second half of 2021, categories such as Computers, Travel, Insurance, and Clothing have increased over the same time period.

The launch of WizzAd and Nielsen Ad Intel Digital data to New Zealand's product portfolio in July 2021, plus the addition to measurement of Instagram & Twitter Video (Sept 2021) has given the market a more comprehensive view of digital advertising activities in the market. The inclusion of TV & Print Creatives in Nielsen's WizzAd from July 2022 provides the market with an expanded view of competitive creative information, beyond the current offering of digital creatives.

In line with the vision of delivering a true picture of consumers' viewing habits on all internet-enabled devices in a household, 500 streaming meters have been successfully incorporated into Nielsen's' Television Audience Measurement (TAM) panel across New Zealand. Data from the newly installed 500 streaming meters is currently being technically developed and reviewed for representation and robustness, in preparation for the next steps in bringing the first phase of data to the market.

Source: Advertising Standards Authority - Advertising Turnover Report, and Nielsen New Zealand Ad Intel

PHILIPPINES

Reflective of how the world has opened up, Out-Of-Home (OOH) exposure had the most significant growth in Q2 2022. But despite Q2 being a news-heavy period due to the recent election, it was not observed to have any major shifts in the other mediums; everything remained stable.

TV viewing levels increased to 12.32% compared to last year's 13.29%, but still not enough to match past year's performance. Radio sees the impact of relaxed quarantine regulations as their levels in Mega Manila declined by almost 1%.

Traditional advertising spending in Q2 2022 grew over 8% from the year before, and almost double from the pandemic-onset of Q2 2020. TV showed a 16% growth in spend, and a 15% growth in volume, reflective of a larger number of channels that have emerged since the shutdown of major broadcaster ABS-CBN two years ago.

Source: Nielsen Ad Intel, CMV, & NUTAM

SINGAPORE

Advertising spend continues to rise in Singapore with a 5% overall growth in the first half of 2022 compared to the same period in 2021. Coupled with the opening up of Singapore in a 2022 post COVID era, outdoor advertising showed the largest growth (22%) followed by radio (9%) and TV (8%).

Categories badly hit by the COVID pandemic in 2020 and 2021 bounced back with their advertising investments in 2022; with Airlines, Events and Travel Agencies/Tourist Commissions increasing their spends dramatically this year (242%, 61% and 46% respectively). Where some categories which are more akin to a stay-at-home COVID mentality, such as Home Décor, reduced their investments this year by 43%.

The Fitness category also saw an interesting shift with a 66% drop in ad spends for Home Gym Equipment whereas a return in investments from

Nielsen

the Sports Centers and Clubs; indicating a post COVID trend of fitness enthusiasts returning back to physical gyms rather than exercising at home.

However, with the continued popularity of online shopping, the largest ad spenders this year were largely in the Online Shopping Portal category where the majority of their media spends are in digital channels.

Source: Nielsen Singapore Ad Intel

SOUTH KOREA

In the first half of 2022, as COVID has become endemic and it got people to enjoy increased outdoor activities, media usage time also decreased due to a decrease of time spent at home. The TV commercial market declined for the first time since COVID due to a decrease in viewing time. Total individual's average time viewing on TV decreased by 5.2% compared to the same period in 2021. One of the most popular dramas in the first half of 2022 was *Extraordinary Attorney Woo* which aired on ENA, a small pay channel, and showed an average minute rating of 5.9% for total individuals, which is remarkable for a cable channel.

Average time spent on PC, a fixed device, decreased by 13% compared to last year. In the mobile market, Online Shopping has kept becoming part of daily life since COVID, and mobile apps for Sports/Leisure/Travel that are highly related to outdoor activities have received new attention. While the number of users in the mobile video market increased by 3%, the growth rate was higher mainly for domestic OTT such as 'TVING' (+68% YoY) and 'Coupang Play' (+161% YoY), which has drawn more notice with its original content and exclusive sports broadcasting.

Source: Nielsen South Korea Mobile Panel & TAM

TAIWAN

The advertising spend in 1st half year of 2022 in Taiwan remained flat vs 1H 2021, due to the outbreak of COVID in Q2 2022. With a deep dive into different media, there saw the rebound of TV advertising spend; both FTA and cable TV recorded a +8.5% and +5.1% growth vs 1H 2021 respectively. OOH was hit by COVID with 15.8% decrease. Digital remained flat vs previous year. Overall, the top growth categories were e-Commerce and Sports Apparel, due to competition and the booming of sports activities.

The rating of TV decreased around 4% due to the decrease of reach but the viewing hours remained flat. The rating of FTA channels are going up while the news channels and variety channels from cable platforms are going down. Although the FTA channels rating is going up, cable news channels still have the highest rating genre.

With 10% growth in the usage of OTT/Video platforms, 74% of respondents were using OTT/Video platforms yesterday. For SVOD, the usage was going up as well, but only 20% of respondents were using SVOD. Local OTT player, 'Friday', grew over 55% (3.1% to 4.8%), but YouTube and Netflix remained ranked at No. 1 and No. 2 respectively.

Source: Nielsen Taiwan Ad Intel, CMV & TAM

THAILAND

Thailand media spend is bouncing back - Thai people are returning to more outdoor activities. Across Jan - Jul 2022 total advertising spend has seen an increase of 9% and Cinema is up +128%, Outdoor & Transit +28%, and In-store +29% compared to the previous year. As advertising growth continues to return, many sectors are also bouncing back. The biggest spenders are Food & Beverage, Personal Care & Cosmetic.

One consumer, multiple platforms - Thais have switched from watching via a traditional TV player to the digital TV channel. TV viewing via Smart TV grew by 45% from 2019 during the pre-COVID outbreak, and over 45% watched TV via mobile phones, an increase of 8%. Viewers have more options and more ways to watch Thai TV than ever before. The latest data surveyed in the first quarter of 2022 found that 52% of Thai viewers were watching content via streaming platforms or OTT, which increased by 80% from 2019.

The new model of measurement - Thailand has launched Cross Platform Measurement, the first in ASEAN to provide a measure of viewership both on TV screens and through digital platforms, to be in line with the changes in technology and consumer behavior in the current era.

Source: Nielsen Thailand Ad Intel, CMV & Cross Platform Measurement

■

NIELSEN *shapes the world's media and content as a global leader in audience measurement, data and analytics. Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their audiences—now and into the future.*

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RESEARCH INSIGHTS

MPA MEDIA PARTNERS ASIA

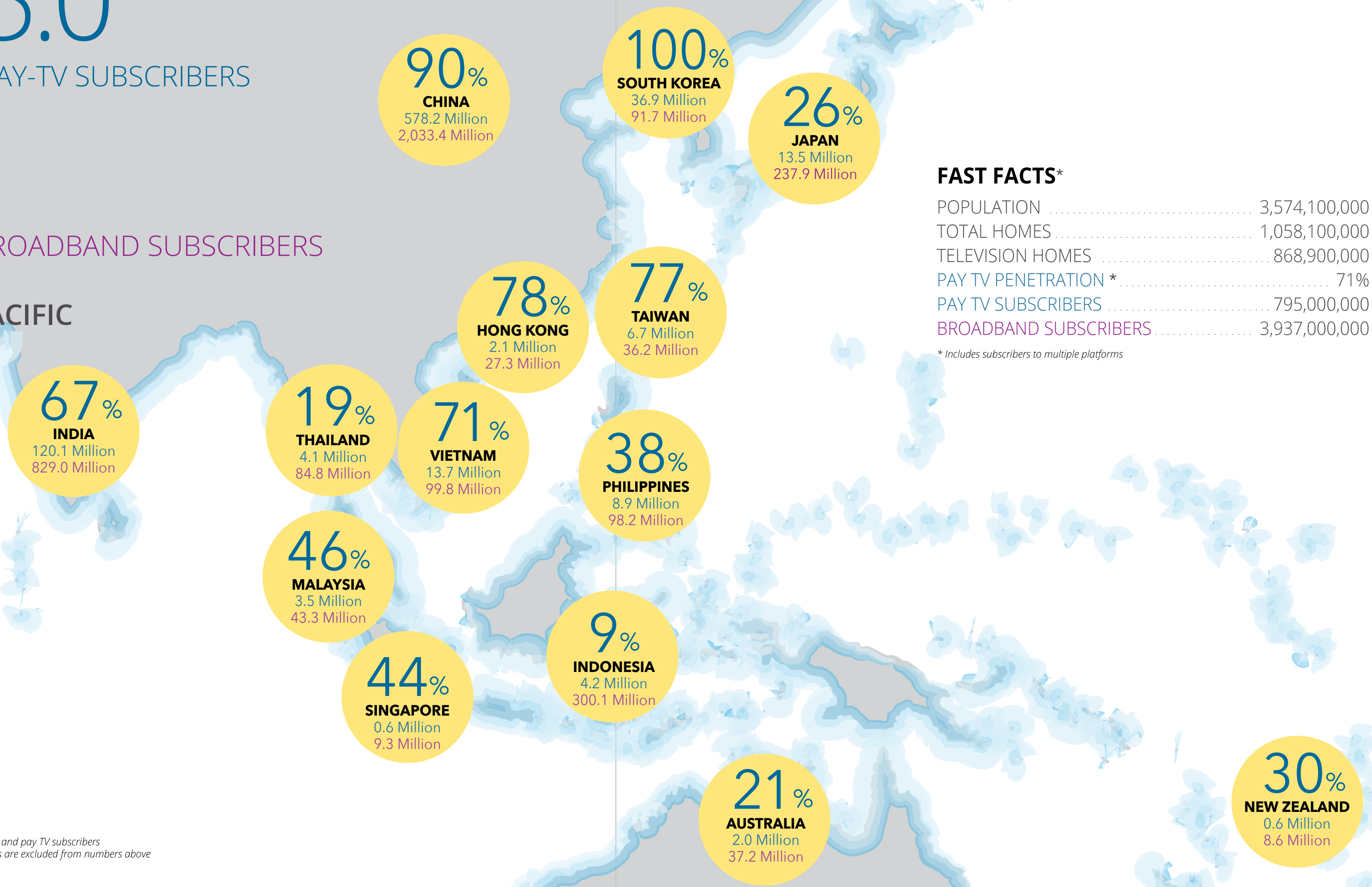
795.0

MILLION PAY-TV SUBSCRIBERS

3.9

BILLION BROADBAND SUBSCRIBERS

IN ASIA PACIFIC



FAST FACTS*

POPULATION	3,574,100,000
TOTAL HOMES	1,058,100,000
TELEVISION HOMES	868,900,000
PAY TV PENETRATION *	71%
PAY TV SUBSCRIBERS	795,000,000
BROADBAND SUBSCRIBERS	3,937,000,000

** Includes subscribers to multiple platforms*

1. Percent of pay TV penetration and pay TV subscribers
2. Free-to-Air satellite subscribers are excluded from numbers above
3. Based on 14 selected markets

Source: Media Partners Asia
Note: Total broadband subscribers include mobile broadband users and fixed broadband households

MPA MEDIA PARTNERS ASIA

HOME BROADBAND HELPS SUSTAIN PAY TV

The traditional pay TV industry retains significance in much of Asia Pacific, driven by a combination of reach and revenue scale. However, new customer growth remains challenging in most geographies though for the most part, cord cutting peaked in 2019-2020. A cost recalibration continues across the industry in several markets, driven by: (1) The impact of foreign exchange currency pressures with a very strong USD; and (2) Pressure on customer and ARPU growth amidst weaker consumer demand, high inflation and competition from online video.

The secular growth of high-speed broadband in the home, driven in most instances by fiber deployment led by telcos, is positive for video. Such deployment often comes in the form of bundled broadband, online video and pay TV services, helping to keep pay TV afloat in many instances. Telcos offering home broadband, IPTV and VOD, continue to benefit the most in terms of growth and profitability. There continues to be demand for local entertainment and sports linear channels.

Pay TV penetration remains robust in markets such as Korea, the Philippines, Taiwan and India. Growth continues to be under pressure in markets such as Australia, Japan, Malaysia, Singapore and Thailand; while cord cutting has peaked in a number of these markets, post pandemic consumer demand remains uneven and customers continue to churn or trade down to lower ARPU packages.

Key highlights by market include:

AUSTRALIA

Pay TV customers continue to contract by 150-200,000 per year though ARPUs remain attractive at a monthly US$60. Leading operator Foxtel retains important sports rights (i.e. AFL, NRL) which continues to help sustain the shelf life of pay TV. Foxtel's growth is increasingly driven by its owned & operated streaming services (i.e. Binge, Kayo) and those it has aggregated (i.e. Disney+, Prime Video and Netflix) into next generation set top boxes.

INDIA

India's pay TV industry remained resilient during the pandemic. However, the introduction of new tariff order (NTO) amendments and the proliferation of FTA channels during the pandemic period capped pay TV ARPU growth while the number of paying subscribers contracted. NTO amendments recommended by the regulator TRAI in January 2020, including a downward revision in channel pricing, capping on bouquet discounts, and a limit to distributor access fees, have negatively impacted the economics of all stakeholders across the pay TV sector. TRAI has extended the implementation date to 30th November 2022, even as the matter remains sub judice. Meanwhile, pay TV distribution platforms have voluntarily implemented the access fee guidelines recommended by TRAI.

INDONESIA

While local free TV reach and demand remain important for low ARPU DTH services, DTH pay TV growth and demand has considerably weakened in recent years. The economics of pay TV is now sustained by investment in bundled broadband and digital video services, led by players such as Telkom Indihome and Linknet, which is now owned by Axiata. Real pay TV penetration remains below 10% in Indonesia.

JAPAN

Pay TV penetration is a steady 26% in high-ARPU Japan. Churn remains high across DTH, IPTV remains sub scale and cable growth is relatively flat in tier 1 cities though there remains continued growth in rural areas.

KOREA

Korea is a fully penetrated and consolidated pay TV market with telcos dominating through a combination of IPTV, digital cable, DTH and SVOD services. Telcos KT, SKT and LGU continue to grow fixed line services due to gains across IPTV, with aggregate IPTV revenue growth expected to come in at 4% during 2022.

MALAYSIA

Demand for pure play pay TV services is weak with consumer sentiment low. As a result, the legacy base of DTH satellite pay TV customers has declined between 2019 and 2022. Encouragingly, demand for bundles of high-speed broadband, pay TV and IPTV services has grown, led by new packages and services offered by Astro and Telekom Malaysia.

PHILIPPINES

Demand for low-ARPU national DTH services offered by Cignal and GSat remains strong due to popular local DTT & pay channels as well as English-language entertainment and sports. Cable in Metro Manila has been weakened by the growth of SVOD.

THAILAND

Provincial and up-country cable operators continue to lose subs but telco AIS has seen considerable IPTV growth due to aggressive repackaging while True has benefited from the expansion of its True ID Android service.

TAIWAN

The pay TV market is contracting, with subscribers dropping to 6.7 mil. in 2022, down from a peak of 7.1 mil. in 2018. Growing competition from SVOD services is accelerating cable cord cutting and eroding the growth momentum of Chunghwa's IPTV service. Within traditional pay TV, cable remains the primary technology of delivery, with 70% share of subscribers. ■

***Media Partners Asia (MPA)**, established in 2001, is a leading independent provider of advisory, consulting and research services, focusing on media and telecoms in Asia Pacific and the Middle East. MPA reports and databases are widely used by industry stakeholders for business planning and strategy. MPA has been involved in due diligence for M&A activity in APAC with numerous local and cross border transactions while also operating as an IC (Independent Consultant) in the IPOs of media and telecoms companies. MPA hosts and operates APOS, the leading annual summit for Asia's TMT industry with global impact.*

MPA MEDIA PARTNERS ASIA

ONLINE VIDEO ENTERS ITS **NEXT PHASE OF GROWTH**

The market for online video in Asia Pacific is entering its second phase of growth. The region remains the largest growth contributor to global online video users today and is emerging as a significant contributor to revenue growth.

KEY THEMES

Large addressable market. Ex-China, combined 4G and 5G users will reach 78% of the population across APAC in 2022 while home broadband penetration will reach 31%. Rising CTV penetration is helping to fuel advertising growth across YouTube and premium AVOD platforms, led by BVOD players, while also bolstering monetization at SVOD platforms.

Content travelability. The production and consumption of high-quality local content with travelability is growing, led by Korea, Japan, China, India, Thailand and Taiwan. Premium sports rights are transitioning online in key markets, often bundled with entertainment on SVOD or freemium platforms.

Rationality. Growth at any cost models are fast transitioning towards more rational models, anchored to monetizable reach. Inflationary content costs remain a challenge.

Policy. Regulatory issues are a significant barrier in China with numerous rules limiting the scope of growth, innovation and creativity across China's large scale online video sector.

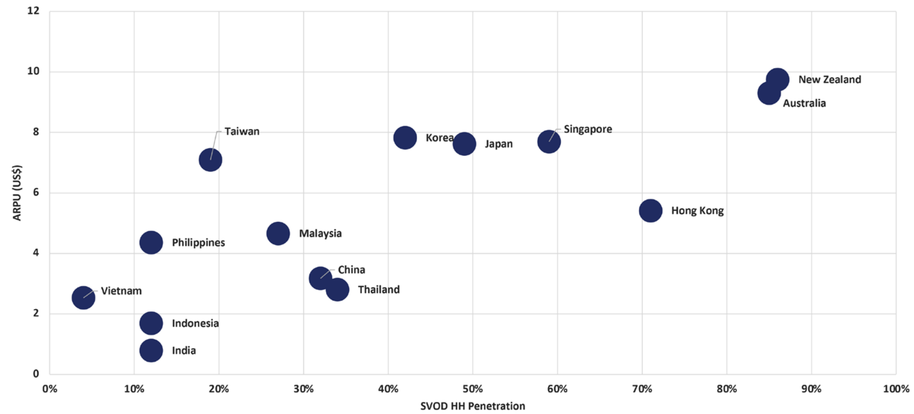
Piracy. Online piracy levels across sports and entertainment are also alarmingly high in markets such as India and across Southeast Asia.

Affordability. While growing incomes and a rising middle class has helped drive affordability, monetizable demand for online video services remains largely confined to large urban markets with huge untapped demand in micro ARPU rural and second / third-tier regions.

VIEWERSHIP

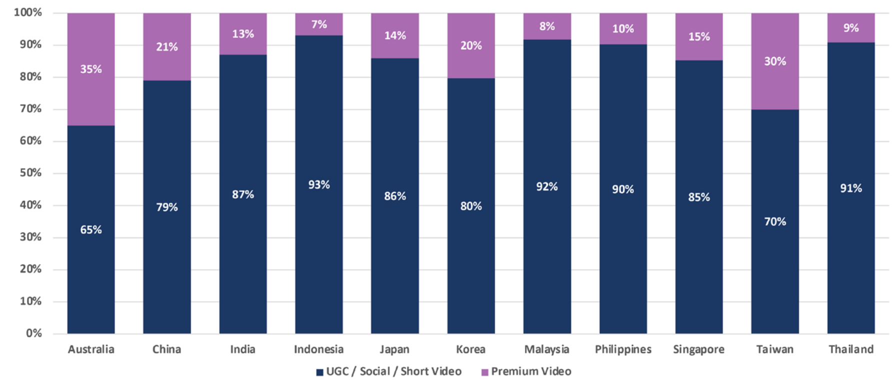
Data from MPA subsidiary AMPD, which measures online viewership and engagement, indicates that premium video, which includes SVOD, freemium and premium AVOD platforms, captured 35% of total online video viewership in Australia for the first nine months of 2022. Premium video's share ranged between 15-30% in markets such as China, Japan, Korea and Taiwan for 9M 2022 and was under 10% in markets such as Indonesia. Such dynamics are a function of production ecosystems, premium local content availability and infrastructure.

SVOD MONTHLY ARPU VS. SVOD HH PENETRATION, 2022



Source: Media Partners Asia

SHARE OF TOTAL ONLINE VIDEO VIEWERSHIP (JAN - SEPT. 2022)



Source: AMPD

Across the region, YouTube is a prominent and powerful driver of time spent on online video, with wide-ranging appeal across demographics, powered by long-tail user-generated content, but also key professionally generated categories like music, kids animation and some FTA. TikTok has taken off in a significant way particularly in Southeast Asia, eroding YouTube's share significantly and is a major contributor to the growth of the streaming category.

MPA MEDIA PARTNERS ASIA

LOCAL LANGUAGE WINS

Market leaders with first mover advantage and strong local content continue to win consumption share in the premium online video space – examples include Netflix in Korea; Disney+ Hotstar in India; Prime Video in Japan; Netflix and Disney in Australia; and Vidio, Viu and Disney+ Hotstar in Indonesia and Southeast Asia.

AMPD Research clearly indicates that local language content is central to drive consumption share in APAC's largest markets.

In Australia, Japan and Korea, local language content drives 70-75% of streaming and local content is even more powerful in India, with 85% share of premium video, underscoring how embedded local content demand and supply has become in the streaming landscape in APAC's biggest, scalable content markets where players are investing in local content across Indian entertainment, Japanese anime and Korean dramas.

US CONTENT STILL RESONATES IN SEA

In Southeast Asia, US, Korean and Japanese content lead, with broad appeal across markets. On average, the three content origins capture 70% of premium video consumption in Southeast Asia as per AMPD. Global players like Netflix monetize their US, Korean and Japanese content investment well in Southeast Asia, with English-speaking markets like Singapore, Philippines and Thailand consuming large amounts of US content online, while Korean and Japanese anime has broad appeal across the region.

Local content consumption is nascent, but emerging rapidly in large markets like Indonesia and Thailand, particularly as local champions (i.e. Vidio) emerge, and global and regional platforms invest in high-quality OTT originals.

KEY MARKETS

China, APAC's largest online video market, is increasingly mature. Two long-form platforms Tencent Video and iQIYI, and two short-form video players ByteDance and Kuaishou lead, capturing ~70% market share in revenue terms in 2022. SVOD leaders such as Tencent, iQIYI and Youku have largely achieved urban penetration, and are launching cheaper tiers and ad-supported content in second tier cities and suburbs.

Australia remains a high revenue generating online video market. SVOD has reached maturity with household penetration at 85% in 2022. Japan and Korea house high-ARPU and relatively high-CPM audiences, with significant growth potential as SVOD penetration of households is not yet saturated at 49% and 42% respectively, according to MPA analysis.

India's streaming OTT video market is in a new growth phase. Competitive intensity is set to grow between global giants and newly capitalized local players. Telco reach remains critical in the market along with AVOD business models and low-ARPU, high volume SVOD services.

Indonesia is Southeast Asia's largest online video market. Led by YouTube, UGC and social video, advertising contributed half of total online video revenue in 2022, down significantly from nearly 80% in 2019 as the premium video sector (SVOD and premium ad inventory) has emerged as a material revenue generator. ■

by Anthony Dobson, MD, AMPD Research

*Launched in 2019 by MPA, **AMPD** uses passive measurement to provide customer behaviour data and insights across the online landscape in 13 Asia Pacific and international markets. AMPD clients include online video platforms, content producers and studios, telecom and pay TV operators, and advertising agencies. AMPD software decrypts title level consumption and first view data for online apps across categories including video, music, gaming and commerce. The fusion of title level and first view data with AMPD metadata and supply level databases drives category insights. MPA is the leading independent provider of research, advisory and consulting services across the media and telecoms sectors in Asia Pacific.*

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THE CHANGING MEDIA LANDSCAPE

MAPPING OUT THE EVOLUTION OF TV AND VIDEO

PREDICTION:

ONLINE TV USAGE WILL CONTINUE TO CREEP UP DESPITE RISING INFLATION

This time last year, the Delta variant was pushing countries back into lockdown and we discussed the impact this was having on time spent online. While we were quick to point out that lockdowns weren't the only driver of online TV growth, hours spent watching it did peak in Q2 2020. The big question was whether we'd see these highs in a post-pandemic context. Though the current situation is very changeable, we're able to revisit our last round of predictions and draw out some new ones.

Compared to 12 months ago, we're in a very different situation. The worst of the virus has passed and some kind of normality has returned. Yet, as the COVID situation improved, a cost-of-living crisis emerged, driving many consumers to rethink purchases like in-home entertainment. For example, 26% of streamers in five APAC markets are considering canceling a TV subscription. But this just means they're open to breaking up with services, not the industry.

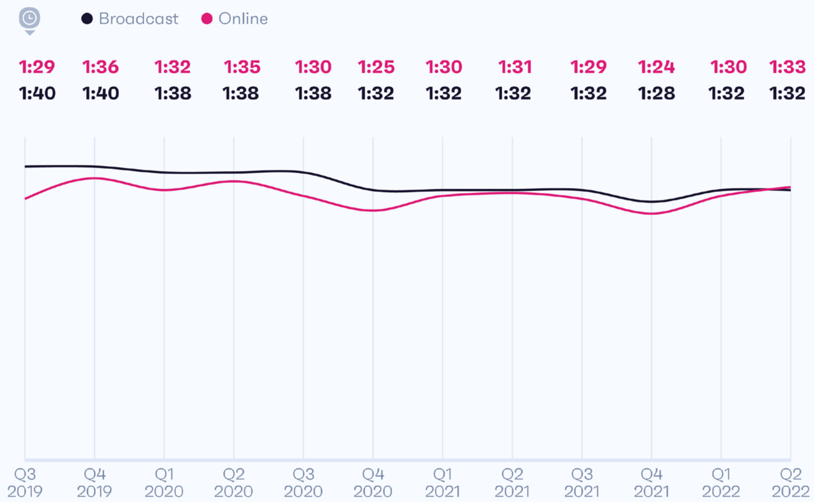
In our last piece, we predicted that time spent watching online TV would match or surpass broadcast, despite the end of lockdowns. And 2022 has seen that happen; online streaming has overtaken traditional TV for the very first time in our latest wave of data. It may be by a slim margin, but it's a huge milestone for the sector.

The years between 2016-19 represent the biggest jumps in online TV usage, and progress is unlikely to ever happen that quickly again because the untapped market in many countries is smaller than it once was. Still, our data suggests that recent joiners are sticking around and that time spent watching streaming services will continue to creep up.

This shift doesn't have to come at the expense of traditional TV. While time spent watching it seems to be trending downward, we expect general viewership to remain steady, with over 4 in 5 continuing to tune in on a typical day.

Time spent watching online TV has overtaken broadcast

Average daily time spent watching online/broadcast TV (h:mm)



On an average day, how long do you spend watching television/online TV?

GWI Core Q3 2019-Q2 2022 914,039 APAC internet users aged 16-64

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PREDICTION:

INDIA AND ITS PLATFORMS WILL HAVE MORE OF A STAKE IN THE REGION

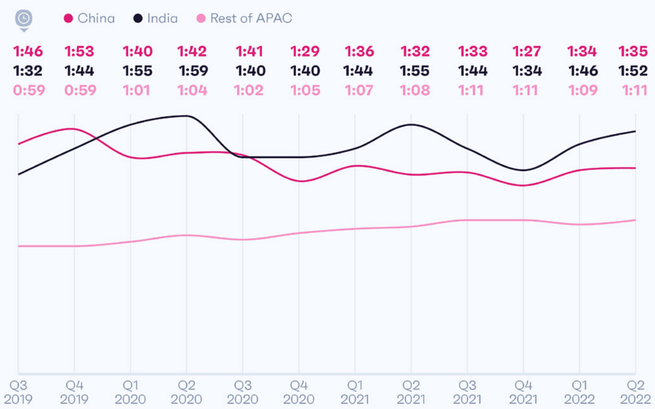
Beyond the cost-of-living crisis, country fluctuations make APAC's TV future a little harder to predict. That being said, they do highlight new opportunities.

Internet users in China and India are well ahead of the wider region for online TV engagement. But they've switched positions since 2019, which reminds us how quickly situations can change. Alongside an economic downturn, the Chinese government clamped down on fan-based culture in 2021. This led to less choice across genres like reality TV, causing demand to dip.

On the other hand, more smartphone availability and affordable subscription plans are boosting online TV's success in India; and since 2020, its homegrown platforms ZEE5 and Sony Liv have both earned a spot on our leaderboard for the region's top 10 services, overtaking Chinese players like Sohu and Mango TV in the process. As more consumers here enter the streaming market, competition will heat up, and the country's set to have an increasingly bigger impact on the region's online TV trends.

India's leaving a greater mark on the region's TV trends

Average daily time spent watching online TV (h:mm)



On an average day, how long do you spend watching online TV?

GWI Core Q3 2019-Q2 2022 | 914,039 APAC internet users aged 16-64

PREDICTION:

AS SMART TV OWNERSHIP RISES, MORE WILL WATCH FROM THEIR LIVING ROOMS

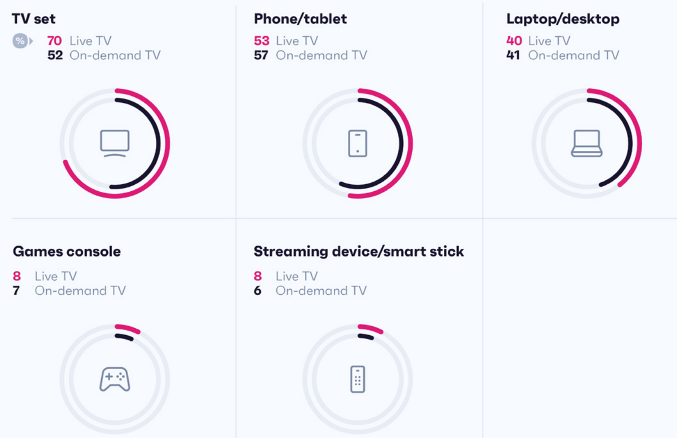
It's not just longer viewing times that are shaping the direction of online TV; the devices people use to watch it are also leaving their mark. Globally, more watch streaming services on a TV set than a phone, but in APAC, the opposite is true. Not only that, smartphones have grown as a way to stream TV over time. Outside China, the number of consumers watching via their phones grew by 33% between 2018-2021, which helps explain why the region's often described as mobile-first.

However, TVs definitely have their place and could become more central to viewing habits over time, especially as they become smarter.

Just as other devices are being used more as TVs, TV sets are taking after other devices. We highlighted these trends last year, and our latest wave of data supports them. Around 2 in 5 consumers in APAC own a smart TV, a figure that's increased by 25% in the last two years. Plus, TV sets are the device of choice for streaming in half of our markets, and they have a big lead on phones in Australia, New Zealand, and Vietnam. Businesses will need to switch up their advertising strategies to suit each audience and screen as cheaper ad-based subscription models take off.

Streaming is taking place across a variety of different screens

% who say they use the following devices to watch each type of TV



Which of these devices do you use to watch Live TV/TV channels | on-demand TV/streaming services?

GWI Core Q2 2022 | 94,763 APAC internet users aged 16-64

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As we anticipated, Netflix is still the leading subscription service, despite facing more competition in a number of countries. Partly because the industry's so saturated, few companies have made significant headway on a regional level other than Indian platforms VOOT and ZEE5, though many are chipping away at certain markets.

In Australia and New Zealand, engagement with Disney+ has risen by 19% year-on-year, and it's the fastest-growing service in the latter. Apple TV+ is climbing the quickest in Indonesia and South Korea, with Amazon Prime Video speeding ahead in the Philippines.

Various services are likely to pass significant milestones in upcoming months, but on the whole, subscriber growth seems to have slowed down. As a result, streaming providers are busy revising their strategic plans. Whether that's introducing weekly releases, bundle offers, or adapting their business model, we expect many companies to make tweaks in their bid to stay ahead.

Top 5 online video services by market

Australia
1. Netflix
2. YouTube
3. Disney+
4. 7plus
5. 9Now

China
1. iQiyi
2. Youku
3. MangoTV
4. Sohu
5. Bilibili

Hong Kong
1. YouTube
2. Netflix
3. Viu
4. myTV Super
5. Disney+

India
1. YouTube
2. Disney+ Hotstar
3. Netflix
4. Amazon Prime Video
5. ZEE5

Indonesia
1. YouTube
2. Netflix
3. Vidio
4. Disney+ Hotstar
5. Viu

Japan
1. YouTube
2. Amazon Prime Video
3. Netflix
4. Abema TV
5. Nicovideo

Malaysia
1. YouTube
2. Netflix
3. iQiyi
4. Astro Go
5. Viu

New Zealand
1. Netflix
2. YouTube
3. TVNZ
4. Disney+
5. Amazon Prime Video

Philippines
1. YouTube
2. Netflix
3. Viu
4. iFlix
5. iWantTFC

Singapore
1. YouTube
2. Netflix
3. meWATCH
4. Disney+
5. Viu

South Korea
1. YouTube
2. Netflix
3. Tving
4. Disney+
5. YouTube Premium

Taiwan
1. YouTube
2. Netflix
3. Line.me TV
4. Disney+
5. Gamer.com.tw

Thailand
1. YouTube
2. cH7HD
3. Netflix
4. WeTV
5. Viu

Vietnam
1. YouTube
2. VTV Go
3. FPT Play
4. Netflix
5. K+

In the last month, which of these services have you used to watch/download TV shows, films or videos?

GWI Core Q2 2022

94,763 APAC internet users aged 16-64

While consumers in parts of APAC are very price-conscious, they're value-conscious before all else. When paying for a streaming service, content that's relevant to their interests and original material are more important than price. Providers therefore need to keep delivering quality entertainment as production costs rise and preferences shift.

A lack of sports action in 2020 saw it slide down the rankings, and it hasn't been able to reclaim its position just yet. Meanwhile, the fall for cultural channels, lifestyle shows, and soap operas has been even sharper.

Luckily for consumers, drama, comedy, and children's TV were there to fill in the gaps. Whether intense or light-hearted, they allowed people to escape everyday reality when times were hard. Even reality TV offered them a window into a very different life, unlike lifestyle shows around gardening and cooking. Clearly, many of the genres that gained popularity during lockdowns have held their appeal or gained some, making them key drivers of user retention and future growth. ■

Children's, education, and drama shows are the ones to watch

Rank in popularity of the following TV genres among APAC internet users

In a typical week, which of these genres will you have watched on television?

GWI Core 2019-2022 (averages of waves conducted between Q3 2019-Q2 2022)

914,039 APAC internet users aged 16-64

FINAL PREDICTIONS

- Even if subscriber growth drops as inflation rises, overall usage of online TV will keep edging forward.
- Competition in India will heat up as the country's consumers leave an increasingly greater mark on the region's streaming sector.
- TV sets will become more relevant to this space, pushing brands to rethink their advertising strategies.

GWI is the leading audience targeting company for the global marketing industry.

by Shauna Moran
Senior Trends Analyst, GWI


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INTELSAT

MOVING MEDIA CONTENT TO THE CLOUD VIA SATELLITE

The media and entertainment industry has changed substantially over the past years. The emergence of new technologies and the ever-evolving viewer consumption patterns have driven content providers to look critically at their distribution networks. This has led them to the question: how do I best optimize my network, while maintaining stability but not limiting my growth opportunities?

Cloud services have become an integral part of this business model. The use of cloud services leads to cost savings and increases access to better resources such as the ability to archive content and utilize playout. Adoption was accelerated as a result of the pandemic; however it is expected to continue to rapidly grow across media companies in the next couple of years.

As we analyze cloud adoption patterns, we see that it has different speeds. On the one hand, many global content providers have already adopted cloud services as the standard of their operations, both for content creation and distribution. Remote content ingestion and cloud editing are two of the clearest examples of this early adoption in the content creation part, followed by cloud playout.

On the other hand, many content providers have not yet adopted the cloud as a part of their infrastructure due to lack of resources. Most of the time, these content providers could benefit the most from the considerable cost restructuring that comes with using cloud services.

Content providers now need to utilize multiple technologies to address their viewers' consumption habits which includes both linear and OTT. Cloud services is only part of this conversation which is why hybrid distribution options have become more desirable.

With all the new technology available, the ubiquity of satellite that provides for the distribution of content and bandwidth remains unbeatable. That is why, as content providers continue to adopt cloud strategies, they must look at hybrid options to maximize their distribution. Combining cloud with only terrestrial networks can be limiting and inflexible. By leveraging the integration with satellite, cloud services are now extended to the satellite footprint, increasing reach, and further driving efficiencies for content providers.

This is why Intelsat is integrating secure access to cloud technologies into our global media network. We are working with the main global cloud providers to place cloud infrastructures in close proximity to our network Points of Presence (PoPs) and antennas. This provides customers with last mile positioning.

This model offers numerous benefits. The first and clearest is the reduction of egress cost. This is an important part of the service for cloud users who are pushing content from the cloud for distribution. By adding cloud as a secure extension of the Intelsat network, egress cost is zero to pull content from the cloud and uplink it to a satellite for distribution. Secondly, our last mile strategy reduces risks of video transport. With customers content being in "cable distance" of our teleports, content is reliably uplinked to satellites for regional and global distribution.

In early 2022, we had our first customer utilize our cloud services model. C-SPAN, a nonprofit, public affairs network providing Americans with unfiltered access to federal government proceedings uses the cloud and Intelsat's Cloud Connect product to store and archive their content. C-SPAN and Intelsat have been longstanding partners driving innovation in the media industry.

As content providers make the move to cloud services, the time is now to take a holistic look at distribution needs and embrace multiple technologies to maximize the potential of your content. ■

by Terry Bleakley
Regional Vice-President, Asia Pacific, Intelsat

As the foundational architects of satellite technology, **INTELSAT** *operates the world's most trusted satellite telecom network. We apply our unparalleled expertise and global scale to connect people, businesses, and communities, no matter how difficult the challenge. Intelsat is building the future of global communications with the world's first hybrid, multi-orbit, software-defined 5G network designed for simple, seamless, and secure coverage precisely when and where our customers most need it. Follow the leader in global connectivity and "Imagine Here," with us, at Intelsat.com.*

PLANETCAST

TAKING ADVANTAGE OF THE CLOUD **TO DEPLOY PLAYOUT DISASTER RECOVERY** THAT FITS YOUR BUSINESS

There have been more than a few global press headlines spotlighting the risks of working without playout disaster recovery (DR) protection in recent months. Despite high levels of resiliency, it is a fact of life that playout systems fail – and it is not if but when.

Disasters such as fire, flood, or the accidental cutting of power or critical cabling can and do cause outages. The reality is that even near-perfect 99.99% ("four nines") playout reliability means a statistical average of about an hour of downtime a year. Moreover, the increasing complexity of playout plus the growth of linked services such as over-the-top (OTT) and international distribution means that the impact and financial and reputational cost of downtime have grown exponentially.

Traditionally, a full active/active on-premise DR set-up that has replicated the playout infrastructure has been one way to ensure resiliency. If you lose one site, then all of the workload moves to the other site. The drawback has always been cost, especially for smaller and more specialised broadcasters and streaming services. For many, creating a fully redundant playout infrastructure is out of the question.

So, what is the solution? In the face of concerns about DR, many broadcasters and streaming services are looking to the cloud, which is playing a growing role in everyday playout. Planetcast has actively worked to offer a 'Lite', cloud-based channel back-up solution that replaces the monolithic active/active on-premise set-up, enabling a level of cost feasibility that makes DR available to any media business operating a linear service.

Today's advanced cloud playout technologies makes it possible to offer a broadcast-grade DR solution with minimal recurring costs until the service is activated. This "pay-as-you-use" cloud DR approach means there is virtually no running cost when the back-up system is not in its playout mode. The full cost of cloud playout should only kick in when there is an outage. However, the solution should be fired up and tested monthly to ensure it is able to deliver services as expected.

Nevertheless, good disaster recovery isn't just about moving to the cloud. Having a solution that is also facility - and location - independent is critical to minimising risk. If the backup is essentially in a building in the same local region as the primary facility, then it could be exposed to the same geographic risks that impact the main playout. Many of Planetcast's major international broadcast clients benefit from a multi-country architecture, combining on-premise infrastructure with backup disaster recovery in a private cloud facility based in a different region or country to minimise risk.

Furthermore, we are increasingly seeing companies adopt a hybrid infrastructure that mixes on-premise and cloud elements. Not everyone wants to move their whole playout load onto the cloud. Many broadcasters maintain their core channels and high-value content, such as premier sporting events through on-premise infrastructure, due to heavy graphics, live ingest and processing requirements.

But mixing in cloud playout for parts of a media company's service can help with multi-event, multi-lingual feeds. For example, broadcasters increasingly offer alternative streamed feeds of live sports such as football or tennis tournament matches when many are being played simultaneously. Broadcasters can integrate an on-premise infrastructure for core channels and cloud for others to create this type of hybrid set-up. These hybrid configurations lend themselves to integrating cloud-based disaster recovery protection, enabling media companies to easily and economically scale up DR as they grow and add new services that also need to be protected.

It is important to note that if the cloud is to become a vital element of a media company's DR protection, shifting to IP infrastructure is fundamental. If your infrastructure is SDI-based, you can't virtualise or design a cost-effective multi-facility architecture, let alone harness the cloud-based workflows required to achieve best-in-class disaster recovery that is facility - or location - agnostic.

Finally, media brands should view the adoption of cloud-based DR as part of a broader, ongoing journey towards the cloud. The overall flexibility and scalability of cloud-based playout not only helps enable cost-effective DR and the launch of pop-up channels and alternative services but, as part of a broader hybrid architecture, it improves overall business agility. ■

by Sanjay Duda
COO, Planetcast

Founded in 1996 with a vision to revolutionize the broadcast industry globally, ***PLANETCAST*** *has been an epitome of quality and trust for almost two decades. With teleports and media centers in Singapore, Mumbai, Delhi NCR and Cochin, PLANETCAST's ability to conceptualize, architect and implement new and expanded capabilities allows clients to take their business to the next level.*

SES

NAVIGATING AND ADAPTING **TO THE NEW STREAMING NORMAL** WITH SES

"My mama always said life was like a box of chocolates. You never know what you're going to get." This quote from Forrest Gump perfectly captures the essence of the video industry in Asia Pacific (APAC) – exactly how dynamic and multifaceted it is. I have had the privilege of working internationally for most of my career, but nowhere else have I seen more diversity and a ravenous drive to innovate than in Asia over the past ten years.

With audiences seeking a mix of both linear and OTT content and their endless search for seamless viewing experiences across multiple screens, content owners and broadcast operators are finding it increasingly challenging to provide the same services using their own resources. Likewise at SES, we too need to think about how we can go beyond expanding our satellite footprints to tailoring our services to meet our customers' evolving needs.

ADAPTING TO CUSTOMERS' NEEDS IS KEY TO STAYING COMPETITIVE

One way adaptability served us well was with Indonesia's largest entertainment network, Mola. When SES first started working with Mola in 2017, they were looking to deliver live football coverage via satellite television. However, with the pandemic and people staying at home, not only did viewers spend more time watching live TV but internet penetration also grew by 45 million users[1] across Indonesia, as did consumers' appetite for hyper-personalised OTT content. In fact, Indonesia is now leading Southeast Asia in OTT consumption with a 40% year-on-year growth.[2]

To meet this growing demand, Mola needed to quickly diversify and expand their OTT offerings, all without compromising on the quality of content. By tapping onto SES's 360 Unified Media Platform for end-to-end content management and distribution services of OTT content, Mola was able to seamlessly transition to meet their audience's new preferences. Five years on, SES is now a direct provider of Mola's OTT content, and a key enabler for the network to move into delivering a wider range of sporting content such as golf and mixed martial arts, alongside their own original content.

Ching Ping Lee, Chief Technology and Operations Officer at Mola, echoes similar sentiments on the fast-changing nature of our industry – and the necessity of meeting customers' evolving demands.

He said, "Being part of the broadcasting industry in Asia means we must always be able to respond quickly to changes in the media landscape. As we prepare to shift business priorities to accommodate evolving consumer needs, we are glad

to have SES as a reliable partner. With the right solutions for our needs and the flexibility to adapt as we grow, we know we are in good hands."

Going back to the chocolates Forrest Gump alluded to – we may never know what we will get but staying adaptable will prepare us for all that the APAC landscape has to offer. I am looking forward to continuing to enable our customers to connect to their audience with a seamless viewing experience. After all, there is nothing quite like hard-won success – and succeeding in a highly complex market like APAC offers satisfaction far greater than a box of chocolates. ■

by John Huddle
Director, Market Development, Asia, SES

__SES__ has a bold vision to deliver amazing experiences everywhere on earth by distributing the highest quality video content and providing seamless connectivity around the world. As the leader in global content connectivity solutions, SES's video network carries 8,400 channels and has an unparalleled reach of 366 million households, and a billion people worldwide, delivering managed media services for both linear and non-linear content. For more information visit: www.ses.com.

1 Tempo, Indonesian Internet Users Jumped by 45 Million due to Pandemic: Survey
2 The Trade Desk, Indonesia OTT consumption highest in Southeast Asia as growth hits 40 percent

BytePlus

MEDIA MARKET WATCH IN ASIA PACIFIC

While the world was confined within the four walls of their homes, streaming video content transformed into a habit. Fuelled by the pandemic, the spike of APAC digital video viewers in 2020 was at a record-high of 1.93 billion.

During the lockdown boredom, digital consumers craved entertainment — there was plenty of room for escapism and humour. But as we emerge from the pandemic, and the demand for streaming entertainment returns to more 'normal levels', sustainable growth surfaces as a major concern for industry executives.

BytePlus seeks to address some challenging issues that befall upon content providers:

- How do they keep pace with the ever-evolving media landscape?
- Just as importantly, what are some **challenges** on the horizon that streaming services should keep an eye out on?
- How can market players reinvent ways to **attract, retain, and entertain subscribers** with better content recommendation and deep learning technology?

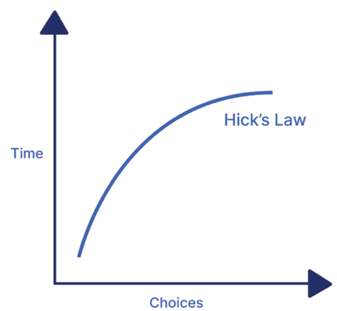
CHALLENGE #1
SUBSCRIPTION FATIGUE

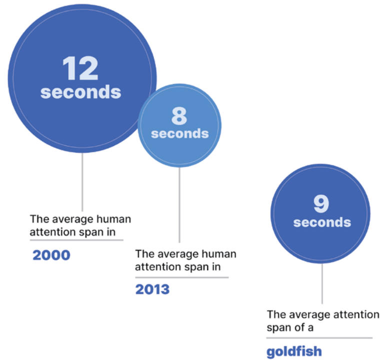
Too much of everything
The new golden age of television is, in some ways, too much of a good thing.

With an abundance of services battling it out in the streaming wars, consumers are hit with an avalanche of options.

By virtue, users desire power and control over products. But Hick's Law suggests that along with that power and control comes the frustration that can soak up precious watch time, as users start to feel like they are merely flicking through shows without finding anything worth watching.

In worst cases, should a typical subscriber not find something to watch in 60 or 90 seconds, they could lose interest and move on to something else, like a book, or even old-fashioned TV.





Goldfish-sized attention spans
Furthermore, the average human attention span has fallen by 66%, from 12 seconds to 8 seconds.

That is shorter than the average attention span of a goldfish.

One school of thought on the cause of the reduction of attention span is the continuous stream of entertainment. To that end, the race to be top-of-mind is critical.

Netflix, for instance, not only focuses on localization and internalization, but also 'thinks global, and acts local'. Simply put, they build products for both local and global markets in mind.

'Hit and run' subscribers
Another worrying trend is the rising phenomenon of 'hit and run' subscribers: those who watch the hits, then cancel their subscriptions. Starkly, Deloitte Insights found that as much as 62% of users had signed up to watch a specific show, then cancelled as soon as they were done.

And they did it in a snap: 43% of subscribers cancelled the same day they decided they no longer wanted the service. This leaves streaming video services with little time to respond.

Given the churn challenges, streaming services need to be more aggressive in how they expose users to other content on their platform.

CHALLENGE #2
THE PERSONALIZATION CONUNDRUM

As Charlie Sung, Head of BytePlus, APAC points out, "Recommendation should be at the heart of every service provider's growth strategy, be it in churn management, ad revenue or user engagement." Done well, recommendation engines like BytePlus Recommend, offers in real-time an objective-driven, personalized user experience that allows consumers to find and access relevant content based on their habits and preferences.

Choosing not to personalize perpetuates the delivery of fragmented experiences. Those who forgo personalization do so at their own peril, as poor (or no) personalization efforts reportedly led to 41% consumers adopting alternatives.

CHALLENGE #3
VIDEOS THAT BUFFER

The recent explosion of digitization, coupled with the growing adoption of online services, have shone a spotlight on latency issues and the negative impact video start times can have on the overall viewer experience. Because people own multiple devices and expect them to work well together, a great customer experience is now the norm. For example, everyone expects to be able to binge-watch their favourite shows without any issues.

BytePlus

So how can service providers keep up while continuing to push the boundaries and differentiate their services?

For those hoping to binge watch their favourite TV series, a server issue of buffering stream makes the viewing experience unbearable. With 26% of mobile users leaving sites that take more than 4 seconds to load, content providers can ill afford persistent latency problems in the increasingly contested streaming wars.

Following a subpar streaming experience, subscribers are also less likely to return to the platform, and worse still, cancel their subscriptions altogether.

AVOID MARCHING BACKWARD INTO THE FUTURE

APAC continues to be an attractive region for streaming services looking to reach greater subscriber scale.

It's not all smooth sailing; there are also difficulties. Low-end mobile devices in developing regions, as well as low network bandwidth in rural areas, add another layer of difficulty to providing the best viewing experience across APAC.

To emerge victorious in the hodgepodge of streaming services, delivering exceptional customer experiences and exceeding client expectations is key. A perceptive and intelligent content discovery strategy is a key differentiator in attracting and engaging subscribers over the long-term.

We are only scratching the surface of the possibilities in OTT. At BytePlus, we are committed to reinventing our ways to help service providers keep pace in the fast-evolving market. Click here to learn more about BytePlus. ■

by Charlie Sung
Head of APAC, BytePlus

Borne from ByteDance's technology, we help our clients maximize their growth through a wide range of intelligent technology solutions. Our dedicated team of specialists works hand-in-hand with customers to help create better products, yield better experiences, and realize business growth.

Dolby

A SOUND COMBINATION DRIVING **CONTENT + DEVICE + SERVICE EXPERIENCES**

Over the years, the content consumption behavior of consumers has witnessed an exponential change and has led to a significant rise in the consumption of content by the people, in the living room, and on-the-go experiences. Users today have the option to set up state-of-the-art home-entertainment systems that offer a cinema-like experience in their living rooms. Moreover, the rise of affordable smartphones and the easy availability of the internet has only accelerated this growth. Today, music and quality audio-visual experiences are a huge part of consumers' lives. People have access to music, games and podcasts or watch TV and movies at home or on-the-go making digital audio-visual technologies our closest companions.

The demand for quality audio-visual technologies has become essential because of their engagement value. At Dolby, that's what our work comes down to. With our audio-visual technologies, Dolby Atmos and Dolby Vision, respectively - we intend to draw the audience, elicit emotional connect, deliver the smallest of details, accentuate what we watch on the screen, and make it impactful. Beyond the codecs, our job is to bring fans closer to the content that moves them, to deepen the connection between creators and their audiences with content and devices enabled with Dolby technologies for an immersive experience.

For example, in Indonesia Vision+ newest originals, *ORKES Semesta*, is the first audio-visual concert with music genre originals from Vision+. The platform adopts Dolby technologies, Dolby Vision and Dolby Atmos, to provide an elevated immersive concert.

According to Clarissa Tanoesoedibjo, Managing Director of Vision+, "As our first entry into the music scene, we are proud to say that "*ORKES Semesta*" is one of our greatest innovations for our Originals. With a surreal-themed concept surrounding "Space" and "Orbits", combined with the intimacy through dialogue that chronicles the manifestation of Maliq D'Essentials in their careers and identities, this is not only a content breakthrough but a technological breakthrough for us as a streaming service to become Indonesia's first OTT platform adopting Dolby Vision and Dolby Atmos. As the boundaries for quality in local content and media increase, Vision+ will continue to explore how we can incorporate this standard across and throughout the rest of our product and platform offerings."

Similarly, Galaxy Play is the first OTT/streaming platform in Vietnam to adopt Dolby Vision and Dolby Atmos experience. Dolby Audio experience is also widely available on Galaxy Play's VOD catalogue and ranges from its original series to licensed content. The platform has already streamed "*Catch Me If You Can*" and at least three more Galaxy Original series will be made available for consumers to stream in Dolby Vision and Dolby Atmos this year across TV sets, mobile phones and other devices as Galaxy continues to court Vietnam's connected consumers.

Ashim Mathur, Senior Regional Director, Japan and Emerging Markets, Dolby Laboratories added, "We are thrilled to be collaborating with our partners at Vision+ and Galaxy Play to elevate consumers' entertainment experiences at home and on-the-go. Dolby Vision delivers a more vivid, lifelike image thus bringing entertainment to life, whilst Dolby Atmos produces sound with incredible clarity that allows users to hear details they've never heard before. With *ORKES Semesta*, consumers will enjoy spectacular musical performances with Dolby enabled TVs, mobile and tablets, and similarly with Galaxy Play, subscribers can now experience *Catch Me If You Can* come alive in ultra-vivid colors with Dolby Vision and the immersive sound of Dolby Atmos at home and on-the-go."

A good sound accompanied with great visuals brings every emotion together in a story. At Dolby, we work with each member in the value chain and give them the tool, the know-how and the technology to create content and do better storytelling for a wholesome immersive audio-visual experience. ■

by Ashim Mathur
Senior Regional Director, Japan and Emerging Markets
Dolby Laboratories

***DOLBY**'s remarkable audiovisual technologies heighten and deepen your experiences, helping you feel more. It's the heavy downpour in a moody scene. The stunningly vivid sunset in the show's season finale. The song you feel deep in your chest. The footsteps lurking behind you on the video game battlefield. The voice of a colleague on a call who lives across the globe but sounds like they're right next to you. We breathe life into these experiences through our innovative audiovisual technologies. This is the Dolby Difference.*

TECHNOLOGY

ENDEAVOR STREAMING

HOW APAC BUSINESSES CAN **UNLOCK OPPORTUNITIES** IN THE DIRECT-TO-CONSUMER OTT LANDSCAPE

The over-the-top (OTT) video streaming market in Asia Pacific is flourishing. In fact, video streaming in APAC is expected to be a USD$76.6 billion industry by 2030. To capture their share of the market, brands and content owners looking to create direct relationships with consumers need more than just a technology vendor—they need a strategic growth-focused transformation partner. OTT streaming platforms are far from set-it-and-forget-it assets; they require a constant feedback loop and optimization to strategically fine-tune the user experience and unlock new revenue streams. With the democratization of direct-to-consumer streaming technology, brands regardless of size can leverage valuable resources to make OTT a core part of their business strategy and revenue portfolio.

MONETIZE CONTENT ACROSS SVOD AND FAST

Identifying strategic avenues to monetize intellectual property and licensed content is fundamental to any OTT service today. The goal is to match content with targeted audiences on owned and operated platforms as well as free ad-supported TV (FAST) channels. In addition to capitalizing on the adverting and subscription-based revenue generated within SVOD, brands can leverage FAST as a complementary strategy to reach untapped viewers, bring in additional advertising dollars, and create better brand awareness and top-of-funnel lead generation. Although FAST is in its infancy in APAC, adoption rates are expected to accelerate in the coming years.

DRIVE ENGAGEMENT WITH INTERACTIVITY

Engagement is currency in the video streaming space. To drive that engagement, brands need tried-and-tested toolsets to offer the localization and interactivity that result in greater user loyalty and retention.

Interactivity helps brands differentiate themselves in a crowded market. OTT platforms can layer in all kinds of interactive features including graphic overlays, statistics, and multi-view directly within the viewing experience. In-stream commerce capabilities also enable fans to transact on merchandise without leaving the video stream, leading to not only additional revenue streams but added user engagement. With the right expertise, brands can identify the interactive feature sets and content treatments that will result in the greatest return for their specific audiences.

CRAFT THE SUPERFAN'S PARADISE

When it comes to sports content, fans want exclusive, behind-the-scenes access to their favorite teams and players far beyond game day. OTT experiences can serve as the launchpad for sports organizations to build a successful digital media business with the fan at the epicenter. From a business perspective, OTT platforms provide tools for commercialization flexibility, predictive analytics, churn mitigation, and significant revenue opportunities.

One example: In late 2021, SKY Perfect JSAT (SPTV) partnered with Endeavor Streaming to launch its new streaming service, SPTV Bundesliga Live. The service allows viewers in Japan to watch live and on-demand games while interacting with real-time data overlays to receive a more personalized viewing experience. SPTV Bundesliga Live also provides SPTV with additional monetization avenues that optimize the value of its content and drive sustained growth for the business. By taking a similar holistic approach to crafting tailored OTT experiences, brands can create the superfan's paradise in the sports world and beyond.

FOR SUCCESS, ENLIST A BUSINESS TRANSFORMATION PARTNER

Endeavor Streaming, a global leader in premium video distribution, partners with a variety of media organizations across APAC to help them achieve the above initiatives and build OTT platforms positioned for growth. We understand the unique nuances of localized content distribution, whether for live football in Japan with SkyPerfecTV, on-demand movies in the Philippines with TapGo, or for delivering The Ashes cricket across APAC. We are committed to empowering our customers to propel the OTT market forward. Through the global footprint of the Endeavor network and our position at the forefront of technology, Endeavor Streaming provides future-focused solutions with unmatched flexibility in content delivery, management, consumption, and monetization. Our industry-leading expertise turns niches into networks, influencers into brands, and national sports leagues into global entertainment icons. ■

To learn more and discuss your OTT needs, please contact yewweng.soo@endeavorstreaming.com

by Yew Weng Soo
Sales Director, APAC, Endeavor Streaming

***ENDEAVOR STREAMING**, a subsidiary of Endeavor, is a global leader in premium video distribution and monetization for live and on-demand content across sports, entertainment, media and lifestyle. Through its complete end-to-end streaming platform and unique service offerings inclusive of advisory and consultancy, growth marketing, custom front-end development and more, Endeavor Streaming helps content creators, brands and rights holders transform, grow and scale their direct-to-consumer businesses.*

iWedia
Part of the ZEGI Group

UX IS KEY TO ENGAGING & RETAINING OTT CUSTOMERS

OTT operators face numerous challenges to engage and retain their customers in a crowded market, but the key element to bear in mind when developing new services or upgrading existing services is the user experience (UX). With many operators now serving as a 'shop window' for a range of streaming platforms, the challenge is to succeed based on their added value and relevance to their customers' needs. Increasingly, this comes down to the quality of the whole subscription package, not just the content.

Operators should also ensure they are providing a comfortable and painless user experience to their customers. Users do not necessarily realise that they are having a good experience, but they certainly know – and act accordingly – when it is a bad one. A well-designed interface with easy commands and simple to use search functions will reward operators with engaged and loyal customers.

There is a growing need for quick and easy content aggregation across multiple platforms because customers do not want to be constantly closing and opening apps and services to scan for what's on offer. In this situation, operators can add value by enabling users to search across many platforms with a single 'click' to find that movie or TV show they are looking for. Adding to this, operators that can provide a fluid and seamless journey across platforms, allowing viewers to pick up shows where they left off while switching between devices, will win loyalty.

Quality of viewing experience is crucial in a world where viewers expect high quality video and have little patience for latency or instability. The entire video pipeline – from encoders, packagers and content delivery networks (CDNs) to the client device's player – must be up to date, especially when viewing content on larger displays where the end users' tolerance for faults and bugs is very low. As a result, operators must select market-tested solutions for both client software and infrastructure.

In terms of new and emerging technologies that will add value to the user experience, a recent survey we conducted with set top box (STB) professionals showed that smart assistants and watch parties are among the next functionalities to add to the STB UX. These services are very desirable to customers and relatively straightforward to integrate, particularly on Android platforms. While we should keep an eye on the possibilities of the metaverse for the future, the survey found significantly less interest in providing VR headset compatibility or access to metaverses at the current time.

All these UX elements and value-added services require significant technical integration with the video back-end,

which is where specialist integration companies like iWedia come in. iWedia offers a wide range of professional advice and services, from technological consultancy and architecture definition to skilled execution, deployment and maintenance. Understanding not only each component of the system individually but also the interactions between these components without losing sight of the overall architecture is the main challenge of successfully managing an increasingly complex end-to-end service that will attract and retain customers. ■

by Xavier Marle
Director of Sales & Business Development for APAC, iWedia

iWedia S.A., *part of Zappware Entertainment Group International (ZEGI), provides world-class software solutions for connected TV devices. We are pioneers in Android TV and support our customers with software architecture and design expertise, field proven products and cost-effective engineering services out of our development centres in Serbia. We are proud to be serving major Telecom operators, Pay TV operators and tier 1 automotive OEMs with our media solutions.*

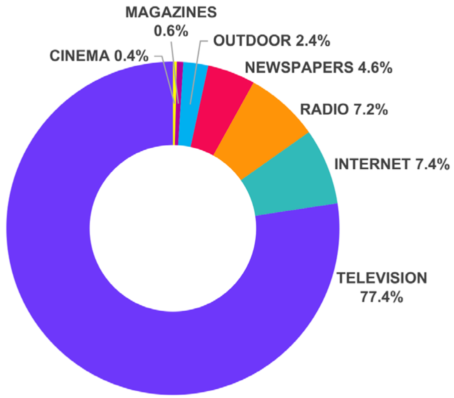
ADVERTISING OVERVIEW

Nielsen

NIELSEN ASIA PACIFIC AD INTEL ANALYSIS

APAC MEDIA AD SPENDING SHARE
Jan – Jun 2022

Remarks:
Markets covered Australia, Indonesia, Malaysia, New Zealand, Philippines, South Korea, Singapore, Taiwan and Thailand.Media not available: Outdoor is not available in Indonesia, Malaysia, and South Korea. Cinema is not available in Indonesia, Philippines, South Korea, Singapore and Taiwan. Internet is not available in New Zealand (due to change in methodology and the data will be ready in later 2022), Philippines and Taiwan.

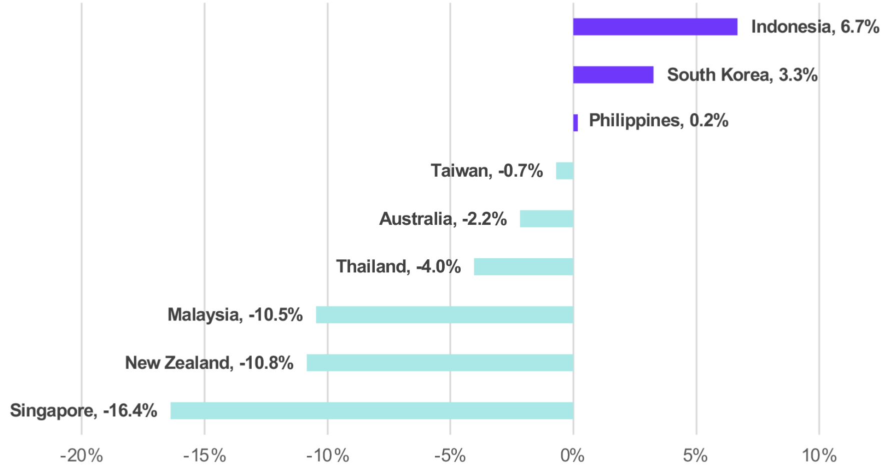


With the improved COVID-19 situation across the region, APAC advertising spending for 1st half of 2022 has recorded a slight growth (+1.0%) compared to 1st half of 2021.

Television remains the biggest contributor in advertising spending among all media and has shown 3.1% growth in 1st half of 2022 compared with the same period last year, followed by Internet with +1.5% growth.

However, other traditional media has been seeing a decline of advertising spending compared to 1st half of 2021:
- Newspapers: -6.1%
- Outdoor: -7.9%
- Radio: -12.6%

APAC AD SPENDING GAIN & LOSS ANALYSIS BY MARKET
1st half 2022 vs. 1st half 2021



Remarks:
Markets covered Australia, Indonesia, Malaysia, New Zealand, Philippines, Korea, Singapore, Taiwan and Thailand.Media not available: Outdoor is not available in Indonesia, Malaysia, and Korea. Cinema is not available in Indonesia, Philippines, Korea, Singapore and Taiwan. Internet is not available in New Zealand, Philippines and Taiwan.

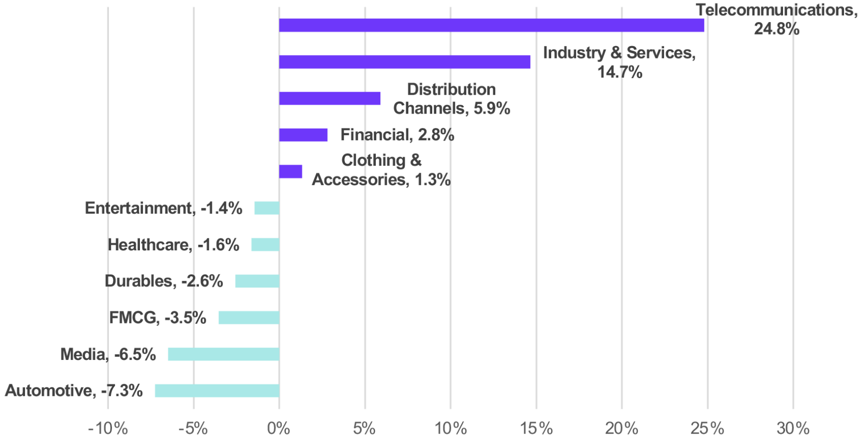
Among APAC markets, Indonesia (+6.7%) and South Korea (+3.3%) have shown a positive growth in advertising spending in 1st half 2022 compared to the same period last year.

The top 3 macro sectors contributing to the increase in Indonesia advertising spending this year are Fast-moving Consumer Goods (FMCG), Telecommunications and Healthcare.

Nielsen

APAC AD CATEGORY SPENDING GAIN & LOSS ANALYSIS

1st half 2022 vs. 1st half 2021



Remarks:
Markets covered Australia, Indonesia, Malaysia, New Zealand, Philippines, Korea, Singapore, Taiwan and Thailand.Media not available: Outdoor is not available in Indonesia, Malaysia, and Korea. Cinema is not available in Indonesia, Philippines, Korea, Singapore and Taiwan. Internet is not available in New Zealand, Philippines and Taiwan.

This year, 5 out of 11 macro sectors showed growth during the 1st half of 2022 compared to 1st half of 2021 with the pandemic having stabilized. Telecommunications (+24.8%) lead the way followed by Industry & Services (+14.7%), and Distribution Channels (+5.9%).

Increase in the Telecommunications sector this year was mainly contributed by Television and Internet, with growth of 9.9% and 56.4% respectively in advertising spending compared to last year.

The advertising spending for Automotive and Media have generated a decline of 7.3% and 6.5% respectively when compared to the 1st half of last year. ■

Nielsen Holdings plc *(NYSE: NLSN) is a leading global data and analytics company that provides a holistic and objective understanding of the media industry. With offerings spanning audience measurement, audience outcomes and content, Nielsen offers its clients and partners simple solutions to complex questions and optimizes the value of their investments and growth strategies. It is the only company that can offer de-duplicated cross-media audience measurement. Audience is Everything™ to Nielsen and its clients, and Nielsen is committed to ensuring that every voice counts.*

An S&P 500 company, Nielsen offers measurement and analytics service in nearly 60 countries. Learn more at www.nielsen.com or www.nielsen.com/investors and connect with us on Twitter, LinkedIn, Facebook and Instagram.

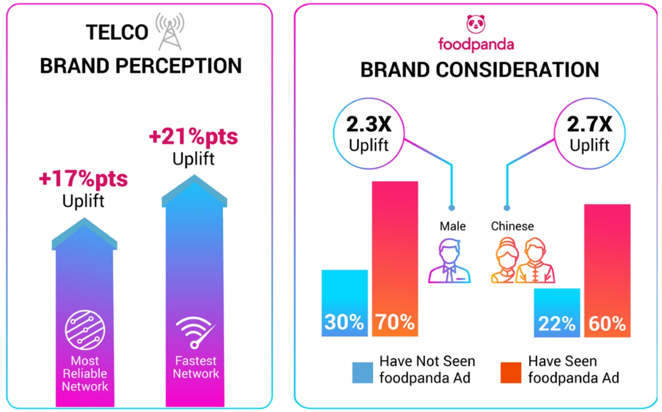
FUTUREPROOFING YOUR MARKETING STRATEGY WITH ADDRESSABLE ADVERTISING

TV viewing today has become highly connected, even more engaging and personalised. Individuals' conversations about and involvement with TV content are readily mediated through various forms of media.

With the cookie apocalypse coming (despite Google's latest push), the tectonic plates of advertising are shifting to a more responsible first party-centric approach to using consumer and audience data. Now is the time to play catch up so when it does happen, you have a future proof marketing strategy in place.

As the leading content powerhouse in Malaysia, Astro has the key binding agent, our premium content, to build our collection of audience data across our media assets. Astro has a "treasure chest" of data; both first party and data enriched. We are able to profile audience segments based on income, location, viewing behaviour, among others; thus, enabling highly relevant ads to be placed against highly relevant audiences. Welcome to the era of "Smart Data", merging the emotive facets of TV's persuasive power with the cognitive facets of data. Astro Addressable Advertising is indeed a powerful tool with its audience-first and data supported characteristic, underpinned by premium content, and with the ability to bundle multi-media platforms together. Leveraging on Astro's first-party audience data to pioneer Southeast Asia's first addressable targeting, this next-gen of TV advertising provides brands a rich and holistic measurement of audience viewing across Linear TV, Video-On-Demand and Astro GO.

BRAND LIFT STUDIES BY AN INDEPENDENT RESEARCH COMPANY



With Astro Addressable Advertising, marketers can now enjoy the best of both TV and digital worlds; the unparalleled scale of attention and emotional engagement of TV, combined with precise targeting capability and advanced campaign measurement focusing on the audience, to be delivered at scale in a premium brand-safe environment.

Regardless of the industry and the size of the company, the good news is that all brands can access TV inventory. Addressable advertising can scale (up or down) to suit various industries and business sizes, thus making it possible for even SMEs to reach TV audiences.

Now we can bridge the upper and lower consumer sales funnel KPIs that allow TV to extend downwards, and ultimately, deliver business outcomes such as leads generation, purchase consideration, traffic footfall, followers to name a few. Eventually, we will also see marketers start to experiment with new upper funnel tactics.

PROMISING RESULTS FOR EARLY ADOPTERS

Early results generated from Astro Addressable Ad campaigns have been very encouraging with independently commissioned brand lift studies demonstrating advertising efficacy.

In the campaign for a telco, among those who have seen its ad through Astro Addressable Advertising versus those who have not, its brand perceptions within 'Fastest Network' and 'Most Reliable Network' categories increased significantly by double digits.

For another campaign by foodpanda, we saw a positive shift of 25 percentage points upward in overall brand consideration, and even more interesting findings under gender demographic. It was a whopping 40 percentage points shift in brand consideration, from 30% to 70%, an uplift of 2.3 times among male target who would consider foodpanda after seeing the addressable ad! And under race demographic, there's positive shift of 38 percentage points in brand consideration among Chinese audience, an uplift of 2.7 times, those are amazing results for foodpanda to expand its customer base.

astro

ADDRESSABLE AD SOLUTION ON ASTRO'S CONTENT & CONSUMER BASED ECOSYSTEM

On Linear TV	VOD	astro GO
71% TV Viewership Share	297mil (jumped 27% YoY) Total On Demand Shows Streamed	524K Monthly Active Users
169mins Average Daily Viewing; 9.8mil Average Daily Viewers	596mins Average Weekly Viewing	195mins Average Weekly Viewing

Source: Astro Q2FY23 Analyst Presentation

ADDRESSABLE ADVERTISING IS THE FUTURE

Together with our business partners, we are committed to reinvent TV advertising and to spearhead the growth of Addressable Advertising in Malaysia. We believe it can reshape the future of TV advertising (and beyond), helping brands win customers in this new era.

Join us on this exciting journey to spark your brand's Eureka moment and magical ideas that deliver exponential brand impact. Astro Addressable Advertising is now available on Astro GO, Video-On-Demand and Linear TV from July 2022, reaching the high-value audiences of Astro households. ■

by Kenny Ong
Director, Astro Media Solutions

***ASTRO MALAYSIA HOLDINGS BERHAD (ASTRO)** is Malaysia's leading content and entertainment company, engaging with 5.5 million homes or 70% Malaysia TV households, 7,700 enterprises, 18 million weekly radio listeners, 11 million digital monthly unique visitors and 3.2 million shoppers across its content and consumer-based ecosystem.*

ALL YOU NEED TO KNOW ABOUT astro addressable advertising

WHAT IS ADDRESSABLE ADVERTISING?

Targeted ads served directly to specific households

Matching targeted ads to the right audience across any device, whenever they're watching

HOW IT WORKS?

We use data-driven household profiles and build the ideal audience segment to best suit your campaign needs

Race · Income Group · Geography · Purchase Behaviour · Interest* · Fandom*

*Coming soon

SAME PROGRAMME DIFFERENT ADS

THE POWER OF OUR ADDRESSABLE SOLUTIONS

DATA DRIVEN
Instead of anonymous behavioural data signals, you can use Astro's first-party data to target specific high-value audiences at scale.

HIGHER ROAS
Pay only for ad impressions that reach intended audience households, thus maximising efficiency with higher return on ad spend (ROAS).

IMPROVED TARGETING
Your ad can precisely target large groups of qualified audience, likely to be able to purchase or demand your products.

BRAND SAFE
TV provides a premium, brand safe environment. Don't worry about your ad appearing next to inappropriate content on mediums prone to negative or damaging influence.

ADVERTISING OVERVIEW

IAS Integral Ad Science

FUTURE OF VIDEO ADVERTISING:
THE RISE & PROMINENCE OF CONNECTED TV

When it comes to advertising on video, the Asia Pacific (APAC) region offers an unparalleled opportunity for advertisers and marketers alike. In 2022, for the first time, the FIFA World Cup will cross over with the traditionally busy 'holiday' season. In addition, the national elections in India, as well as the ICC T20 Cricket World Cup and Indian Premier League will attract large numbers of eyeballs across the region. These events will boost and put a big retail focus on Q4, where Television ad spending will reach US$192.8 billion as per the Global Ad Spend Forecast report released in July 2022. The same report states that Linear TV's share of spend is on the decline - both globally and in the region - as Connected TV (CTV) and Video on Demand (VOD) grow. While Linear TV is growing by 2.0%, CTV is up by 22.3% and Broadcaster Video on Demand (BVOD) growing by 16.0% emphasizes the audiences' shift to digital platforms.

With traditional Linear TV audiences declining in favour of SVOD and AVOD platforms, and the rise of many platforms offering these audiences on OTT, it has become more difficult for advertisers to reach specific audiences and even find a platform where this can be done effectively and at scale. For broadcasters, they have similarly felt the pressure to create a solution quickly for advertisers to transact on to keep up with demand - even if this means that there are impressions left on the table.

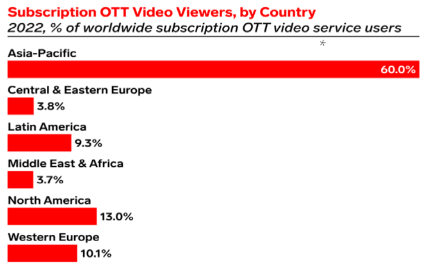
It's no surprise reading the headlines that the market is shifting further toward privacy, and rightly so, and with this broadcasters and media owners have access to troves of data that the rest of the market would love to be able to access.

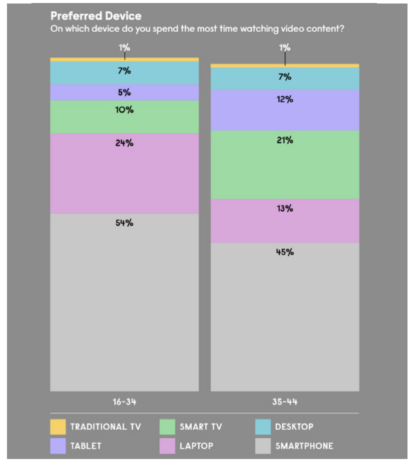
Now CTV is gaining another platform with Netflix launching advertising, although these will not be without restrictions around ads per hour among others, showing how important User Experience is when building your AVOD infrastructure. The issues which have plagued CTV around repeating ads and frequency are now being looked at under a microscope by business leads asking why these issues are still happening and if there is a better way. This balancing act to retain and grow ad revenue without deterring viewers from the platform is compounded by the high demand for the channel, especially amongst premium platforms.

For broadcasters and streaming services, the stakes are high to build better ad breaks – this means without competitive clashes, reducing ad repetition and frequency – to encourage user advocacy whilst maximising the sale price of each advertisement, often easier said than done unless the right tools are in place. Another tactic for broadcasters is dividing bid CPMs by creative length to get a cost-per-second metric on which to base decisions from. Once this is in place, broadcasters can then create an ad break with a mix of ad lengths, allowing more individual advertisers and maximising the value of the pod – a win for consumers and broadcasters.

However not all demand is created equal... Broadcasters who are accessing programmatic demand alongside their direct campaigns need to make a decision on which demand to prioritise, which can be tricky to balance big upfront commitments from advertisers against lucrative programmatic CPMs – which is where Unified Auction solutions are paramount to ensure that programmatic demand is the highest yield it can be without creative issues instead of outdated waterfall solutions that will leave impressions and revenue on the table.

When thinking of CTV advertising, the anecdote 'if you notice the music in a movie, it is not done well' cannot be more relevant – if your viewers are noticing advertising constantly, not only does it deter them from choosing your platform, but it also deters your advertisers from re-investing. ■





Source: Magnite research

Emerging CTV opportunity
While Singapore continues to be a mobile-first region, CTV usage is rapidly growing significantly among older audiences aged 35-44.
21% of OTT viewers aged 35-44 spend the most time watching video on Smart TV.

by Clement Birdsall
Senior Publisher & Platform Development
Director of APAC, Integral Ad Science

Integral Ad Science (IAS) *is a global leader in digital media quality. IAS makes every impression count, ensuring that ads are viewable by real people, in safe and suitable environments, activating contextual targeting, and driving supply path optimization. Our mission is to be the global benchmark for trust and transparency in digital media quality for the world's leading brands, publishers, and platforms.*

** Note: individuals of any age who watch video via any app or website at least once per month that provides paid subscription access to streaming video content over the internet and bypasses traditional distribution; examples include Amazon Video, HBO Now, Hulu, Netflix, Sling TV and YouTube Red; includes overlap between video services. Source: eMarketer, February 2022*

Index Exchange

UNLOCKING ADDRESSABILITY IN AN OMNICHANNEL WORLD

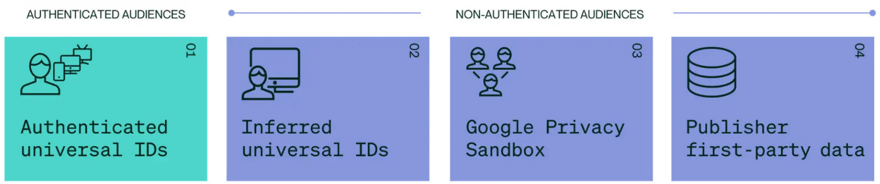
In today's increasingly omnichannel world, there's an ongoing movement to give consumers more transparency and control over their personal data. As a result, the digital ecosystem has seen rapid developments to phase out third-party cookies and mobile identifiers over the last decade.

A privacy-centric future is inevitable and will transform how audiences are reached and measured across devices. Luckily, there's a range of addressability solutions available to help combat the signal loss that comes with the deprecation of third-party cookies and device identifiers.

DETERMINING THE RIGHT APPROACH TO ADDRESSABILITY

In light of shifting digital behaviour, some consumers will feel that allowing their log-in data to be used for targeting and measurement is a fair and equitable value exchange for the content that they enjoy across their favourite media brands, sites, and apps. Others will choose to remain anonymous.

Key solutions and considerations exist for each scenario, these include:



REACHING AUTHENTICATED AUDIENCES

Authenticated universal IDs: with these IDs, consumers consent for their log-in data, email address, or phone number to be used to create an anonymous online identifier. Authenticated universal IDs allow marketers to realise all of the benefits of people-based marketing, without dramatically changing the current approaches to reaching audiences and measuring performance. This includes reaching a consumer across multiple devices, person-level frequency capping, and cross-device measurement. Some authenticated IDs offer associations to Connected TV (CTV) devices, meaning that the potential for omnichannel frequency capping, messaging and measurement won't disappear when the third-party cookie goes away.

REACHING NON-AUTHENTICATED AUDIENCES

Approaches for optimising for non-authenticated audiences include:

Inferred Universal IDs

These IDs allow for targeting and measurement without requiring authentication. They will either use probabilistic inferences to associate a consumer to all the sites they visit in a browser (device-level) or use first-party cookies to associate consumers to a single publisher's sites (site-level).

Google Privacy Sandbox

To support the industry's transition away from cookies, Google launched Privacy Sandbox. These solutions promise scaled addressability across Chrome's massive audience and offer publishers a way to monetise audiences when authentication isn't possible.

Solutions include:

- The Topics API is a proposal that allows marketers to reach third-party audiences in interest-based groups.
- **FLEDGE** and other proposals allow for site visitor retargeting using trusted servers.

Publisher First-party Data

Publisher first-party data is becoming increasingly valuable in today's privacy-centric landscape. Whether activating first-party data for custom taxonomies or advanced contextual solutions, these approaches will help marketers reach the right audiences across the web.

Solutions include:

- Seller-Defined Audiences from the IAB Tech Lab and Prebid promise a standardised taxonomy that allows scaled cross-site targeting based on a publisher's first-party data.
- Advanced contextual targeting allows marketers to reach audiences based on relevant content signals sent within the bid stream.

Index Exchange

Comparing addressability solutions

	Targeting brand offline CRM data	Remarketing to site visitors	Reaching new customers*	Frequency capping	Cross-device attribution
Universal IDs					
Authenticated	✓	✓	✓	Person-level	✓
Inferred probabilistic	x	✓	✓	Device-level	x
Inferred site-level	x	x	✓	Publisher-level	x
Privacy Sandbox					
Topics API	x	x	✓	x	x
FLEDGE	x	✓	TBD	TBD	x
Publisher first-party data					
Advanced contextual targeting	x	x	✓	x	x
Seller-Defined Audiences	x	x	✓	x	x

*Defined as not in CRM and not a site visitor

WHAT'S REQUIRED TO THRIVE IN AN OMNICHANNEL ADDRESSABILITY LANDSCAPE?

Implementing an addressability portfolio provides options for engaging both authenticated and non-authenticated audiences to achieve true reach and frequency across devices.

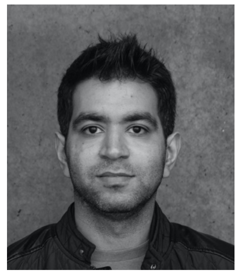
With identifier-based approaches - including both authenticated and inferred universal IDs - the general approach and workflow used to target, retarget, and measure audiences doesn't change much from existing practices as identifiers will still be used in audience segments. Identity graphs can offer associations to CTVs either through CTV IDs or the universal IDs with CTV associations. For attribution, there is an ability to link an ID for an impression on the publisher site to an ID in a conversion event on the brand site. The mechanics of retargeting will be similar to what they are now.

Non-identifier-based approaches to addressability will require significant changes to how audiences are reached and measured. Some of the most promising solutions, such as the Topics API and Seller-Defined Audiences, will offer scale and high-quality audiences, but don't solve for all use cases, such as activating marketers' CRM data or remarketing to site visitors. Without identifiers, measurement and attribution will likely be less precise. The industry as a whole will need to develop other approaches, including panel-based measurement.

THE ADDRESSABLE OPPORTUNITY TODAY

Preparing for the eventual demise of third-party cookies and device identifiers is important, but the good news is there's already a significant opportunity without them, today. 34% of iOS bid requests to Index still contain an IDFA, we can see that a sizable number of consumers are willing to exchange targeted and measurable messaging in return for free content. Ultimately, the time to act is now. ■

To learn more about how to get started download the addressability guide or contact the Index team.



by Yogesh Sehgal
Director, Platform Partnerships, APAC, Index Exchange

***Index Exchange** is a global advertising marketplace enabling media owners to grow revenue by helping marketers reach consumers on any screen, through any format. Headquartered in Toronto, Index has nearly 20 years of experience accelerating the evolution of ad technology for the world's leading experience makers. To learn more, visit www.indexexchange.com or @ indexexchange.*

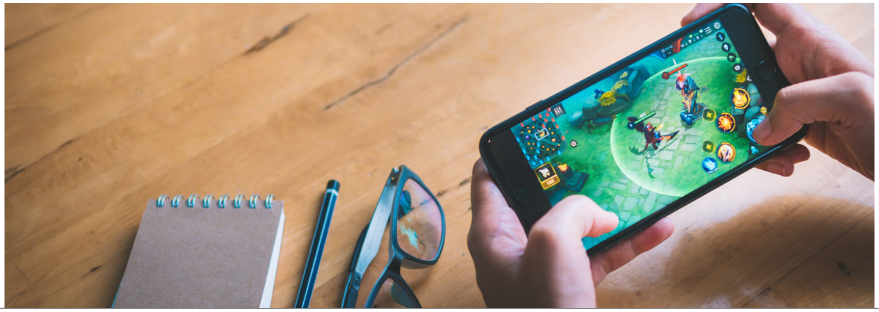
INMOBI

REWARDED VIDEO ADS:
THE HIDDEN GEM OF MOBILE ADVERTISING

In today's fast changing world, the advertising ecosystem is being compelled to innovate at break-neck speed. On one hand, brands are struggling to keep up with the ever-evolving consumers and create experiences that enhance consumer interest and engagement. On the other hand, publishers and app developers need to find ways to increase engagement and retention on their properties and grow revenue while staying compliant with advertising regulations. But the advertising industry has a long history of understanding consumers' psyche and leveraging it to find optimum solutions. Rewarded video is the perfect native experience that bridges expectations of the consumer, the advertiser and the publisher.

People love getting things for free – even when they are not really free. Rewarded video ads prompt users to take voluntary action in exchange for a reward. These rewards are usually premium features that otherwise users might not have access to. While rewarded video ads are typically used for gaming apps, they have a wider range of applications for other apps. They can also be used as interstitial ads on websites which makes them usable outside mobile devices as well. Non-gaming apps have been leveraging this ad format to enhance the in-app user experience. These ads can be leveraged to give access to premium content or in-app currency or time-limited access to select paid features.

In the gaming advertising universe, rewarded video ads operate on the value system and exchange established between a user and a game. Users spend time watching an ad and tangibly reap the benefits in-game. The Everyone's Gaming Among Us report by InMobi shows that **over 74%** of gamers in India and Southeast Asia prefer watching a rewarded video as a method to progress in the game. The report also found that video ads on gaming apps see over **30-40%** higher engagement as compared to industry benchmark.



A WINNING STRATEGY FOR BOTH ADVERTISERS AND PUBLISHERS

Rewarded videos are considered to be the most preferred ad format by users and this trend is only expected to grow upwards. In an attempt to demystify the popularity of this ad format, let's look at the benefits rewarded video ad strategy holds for key stakeholders in the advertising ecosystem.

BENEFITS FOR ADVERTISERS

- **Higher engagement**
  Rewarded video ads are inarguably the most engaging ad format and users opt-in for them. They receive up to **31%** higher completion rate and **2.6 times** higher engagement.

- **Higher awareness and recall**
  The Everyone's Gaming Among Us report by InMobi shows that over **60%** of mobile gamers recall the rewarded video ads they see in games.

- **Higher return on ad spends (ROAS)**
  With all the benefits leading to higher engagement, rewarded video ads help advertisers get more out of the money spent.

- **High reusability and versatility**
  Multiple versions of the same rewarded ad unit can be created by tweaking the end card and the landing page as per the consumer's journey with the brand. The utility of the rewarded video ads also extends beyond the top of the funnel. Their high engagement rate also makes them an effective way to drive action. Rewarded video ads can also be a great way to collect feedback and insights by creating surveys that when answered, provide a reward to the user in the game.

BENEFITS FOR PUBLISHERS

- **Higher fill rates**
  Given how popular and engaging rewarded video ads are, their inventory sees a higher fill rate compared to other ad formats. Publishers working with InMobi have reported up to 30% higher fill rates with rewarded video ads.

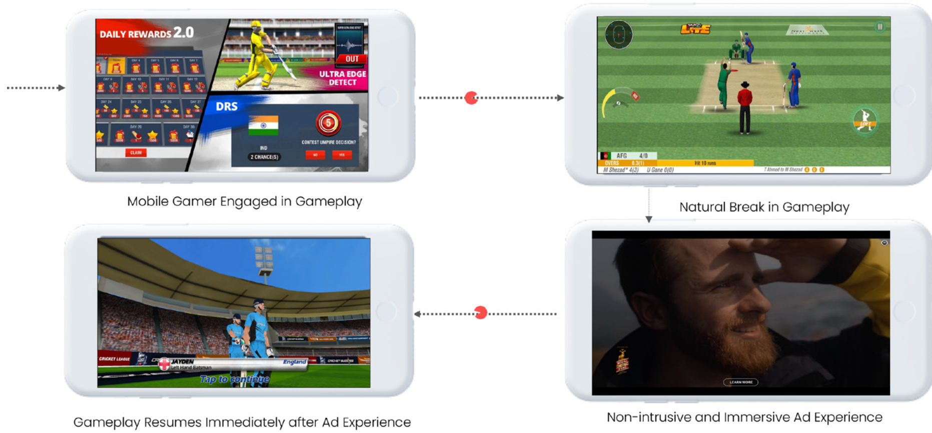
- **Higher advertising revenue**
  With higher demand and higher user engagement, rewarded video ads lead to higher effective cost per thousand impressions (eCPM). A lift of over **40%** in eCPM has been experienced by publishers who monetized these ads with InMobi. We have witnessed an average **180%** year-on-year eCPM growth between Q4 2020 and Q4 2021 in the top APAC markets where InMobi operates. Higher eCPMs and better user engagement increases overall advertising revenue for app developers and publishers.

- **Higher retention rate**
  Access to premium app features through rewarded video ads positively affects the in-app user experience which leads to higher user retention rates and lifetime value.

- **Higher in-app purchase revenue**
  As users spend more quality time within the app, they are more likely to spend on in-app features or currency.

Being a format that helps brands create memorable ad experiences right where their consumers are and enables publishers to monetize their properties and inventories better, rewarded video ads are the hidden gem of mobile advertising. And one can only expect more creativity and innovation in rewarded video ads as the advertising ecosystem learns to explore their true potential. ■

REWARDED VIDEO AD FLOW - ROYAL STAG'S EXAMPLE:



This ad flow is from "Make It Large" campaign by Royal Stag brand of Pernod Ricard India, which drove brand awareness with mobile video ads on casual gaming apps. The campaign reached 2 million unique users in 30 days and resulted in 4 million completed video views with 1.4x higher video completion rates against the benchmarks. The images are for representation purpose only.

by Rishi Bedi
Managing Director, Asia Pacific, InMobi

__InMobi__ is a leading provider of marketing and monetization technologies. With deep expertise and unique reach in mobile, it is a trusted and transparent technology partner for marketers, content creators and businesses of all kinds. InMobi's mission is to power its customers' growth by helping them engage their audiences and build meaningful connections.

IPONWEB

NAVIGATING NEW CONSUMER BEHAVIORS IN THE POST-PANDEMIC ERA

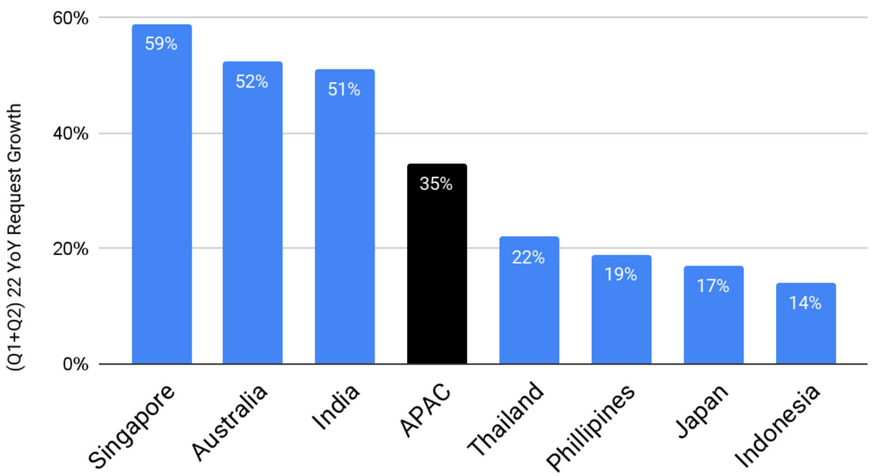
With lockdowns lifted across Asia Pacific, growing industry confidence and willingness to spend on media are clear markers that the advertising ecosystem is bouncing back.

Even after emerging from nearly two years at home, APAC audiences are consuming more content than ever before and they're eager to be entertained. We can also see that the shifts in consumer behavior seen during the pandemic are here to stay with digital penetration rising across all Asian markets, albeit with developments varying across each diverse region.

REGIONAL MARKET GROWTH

After years of pandemic-fuelled growth, the region's increase in digital media consumption continues to drive the video advertising ecosystem. For the region as a whole, BidSwitch recorded a 35% year-on-year increase in video advertising requests and a comparable increase in advertising spend in H1 2022. When broken down by country, we can see that the pace of video consumption (via video advertising request growth) in developed markets is almost double that of less developed markets.

(Q1+Q2) 22 YoY Request Growth by Country



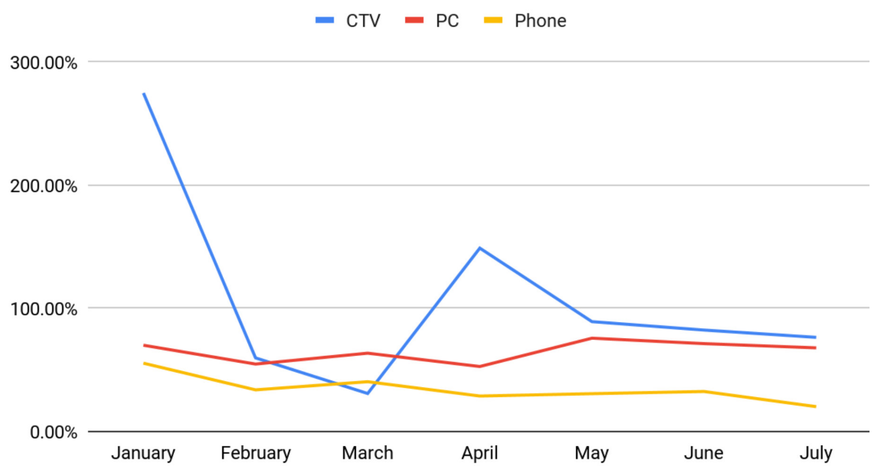
As such a large and diverse region, it is no surprise that there are regional variations. For example, as a recent Nielsen report demonstrates, the developed markets of China and Korea represent ecosystems with seamless integration of e-commerce, online payment systems and content, while India and Australia clearly have established and eclectic video markets. By contrast, Nielsen notes that there's an emerging shift towards digital channels in the developing markets of Southeast Asia which continues post-pandemic.

OVERALL MARKET GROWTH DRIVEN BY PC AND MOBILE

Since 2019, 54% of the APAC population has gone online, with Southeast Asia ranking as the second-fastest growing region in the world. Known as a mobile-first region, the number of smartphone users in Southeast Asia is expected to grow faster than the number of overall mobile phone users. Since the pandemic, consumers in APAC have embraced smartphones for a range of purposes, predominantly mobile payments, gaming, ride-hailing, food-delivery, and – most importantly – videos.

PC digital consumption across APAC has also exploded as the world experienced a rise in remote work and online learning as shown below in the 65% year-on-year growth of desktop ad requests throughout H1 2022. Cisco reported that PCs accounted for 12% of consumer internet traffic compared to TVs, which accounted for 9% of internet traffic in early 2022. As a comparison, in the US, PCs are projected to account for 23% of consumer internet traffic in 2022, compared to 40% for TVs.

CTV, PC and Phone Year-on-Year Growth - Bid Requests



IPONWEB

CTV IS POISED FOR HYPER-GROWTH ACROSS APAC

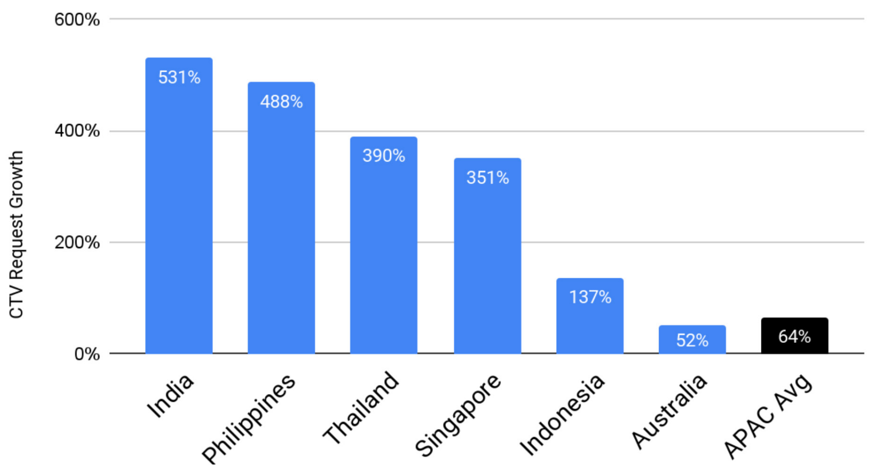
In addition to the increase in mobile and PC traffic, OTT and CTV markets are continuing to accelerate exponentially in APAC beyond the pandemic boom.

While CTV is still considered relatively nascent in APAC, the region is seeing a continuous rise in the consumption of video and content via various streaming channels, especially in those areas with advancing high-speed data availability and increased smartphone usage.

Not surprisingly, different markets across APAC are at different stages of growth and maturity. For example, markets in Southeast Asia are experiencing low penetration and low monetization. Japan reports high penetration with low monetization, and markets such as Australia and China are seeing high penetration and high monetization. China has the highest digital video viewer share of internet users among all countries in Asia Pacific, with penetration reaching 93.4% in 2022 (eMarketer).

On BidSwitch, India saw the highest level of year-on-year growth, with [PWC recently noting](#) that India is set to become the third largest TV market globally by 2026.

CTV Request Growth by Country



However, variances in penetration do not immediately point to consumption or reach issues. Instead, consumption across audiences includes watching content on a broader range of devices. For example, smartphones are essential for communication and video consumption in countries such as India and Indonesia, but traditional DVR devices are preferred to smart TVs and OTT boxes in Japan.

WHAT'S NEXT?

In the coming years, the CTV market is set to continue to grow exponentially in APAC, especially as the region witnesses the growth of high-speed data and increased device usage.

Nonetheless, markets moving at different speeds across APAC poses a unique set of challenges for marketers. In particular, the regional fragmentation poses a difficulty for marketers looking to reach CTV audiences at scale. As these markets mature, APAC should work to develop more expertise and scalable technology solutions to drive media buying and adoption as an effective advertising channel. ■

by Ryan Pestano
Vice President, APAC, IPONWEB

IPONWEB *is an industry pioneer and world leader in the engineering and operation of highly customized, real-time media trading systems for publishers, advertisers, agencies and innovative technology companies. With more than 15 years' experience driving innovation in the ad exchange and real-time technology space, IPONWEB is the 'behind the scenes' technology provider that many of the world's leading industry players rely on to successfully power their media and data businesses. Visit www.iponweb.com to learn more.*

Magnite

WAKING THE SLEEPING GIANT

OF LIVE LINEAR OTT IN ASIA PACIFIC

The impact of OTT has been truly revolutionary, transforming and reinventing the traditional TV space with new digital opportunities – including the rise of live programming. Audiences are streaming their favourite programs on smart devices instead of broadcast television - and many of them are watching these programs live, in real-time. As the global live streaming market continues to grow, estimated to reach over USD$247 billion by 2027, the live streaming boom has huge potential to make an impact in APAC – especially with the region's rapid OTT streaming growth at 90% YOY versus global's 14%.

Within OTT, live linear programming has become a bright spot, with APAC audiences tuning in via streaming devices. Highly anticipated sports events, such as the upcoming FIFA World Cup, will likely attract massive audiences with appointment viewing and diversified programming choices, from mainstream to niche sports.

Live OTT presents a significant opportunity for video publishers and brands to reach highly engaged, addressable audiences at scale. Yet, more investment in live OTT and industry standardisation, together with a deeper understanding of these audiences' consumption behaviour, is necessary to capture the medium's potential fully and drive the most value and demand.

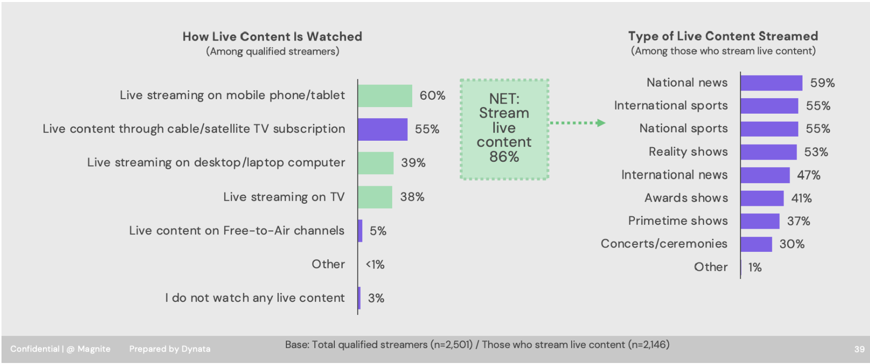
LIVE LINEAR PROGRAMMING DRAWS AD-RECEPTIVE AUDIENCES

As APAC OTT viewing has grown, audiences are embracing live linear programming at a rapid pace - from news, events, reality shows to sports. This is particularly true in Australia, New Zealand and India.

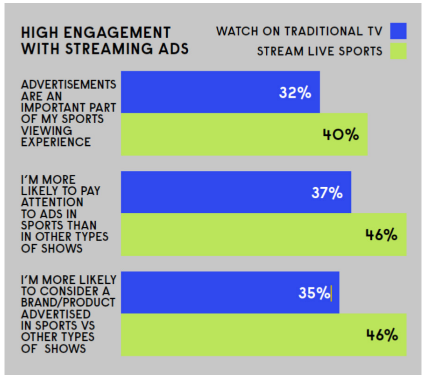
According to Magnite's recent study, live streaming is broadly adopted in Australia, New Zealand and India. In Australia alone, 82% of all OTT users watch live streaming through at least one OTT service. Meanwhile, 80% of all New Zealand Connected TV (CTV)/ OTT audiences can be classified as live streamers. Magnite's India OTT research also revealed 86% are watching live content through streaming where national news, sports and reality shows were the content types most commonly live streamed.

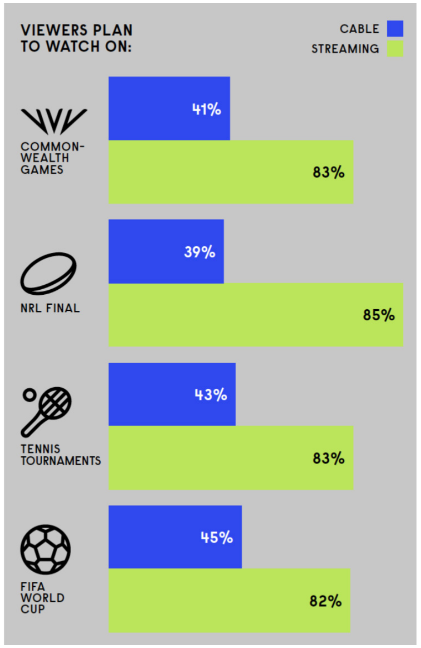
For advertisers, this brings huge opportunities, where live linear OTT environments present special value. In countries like Australia, live ad-supported programming now accounts for an impressive 36% of total OTT viewing time. Live sports streamers are more receptive to ads in live linear OTT environments, which is more akin to broadcast TV. According to Magnite's research, 40% of sports streamers in Australia and New Zealand said that TV ads are 'an important part' of the watching experience. That's

MAGNITE OTT IS FOR EVERYONE INDIA RESEARCH



MAGNITE LEADER IN LIVE AUSTRALIA RESEARCH





not surprising, given the quality of advertising creative used alongside live sports programming.

Live streaming's popularity will only grow, with marquee sports events now readily available via streaming alongside easy access to a plethora of content, from mainstream to niche sports. This is already seen across Australia and New Zealand where viewers are planning to stream rather than watch major sports programs on traditional TV.

Magnite

UNLOCKING LIVE LINEAR'S POTENTIAL IN APAC

With growing OTT markets, a plethora of live streaming services has expanded to the APAC region. To unlock the full potential of live streaming at scale in APAC, where the importance of data driven, quality ad experience is more crucial than ever, broadcasters can focus on the following key pillars:

1. AD REPLACEMENT ACTIVATION

One of the biggest sleeping giants of accessibility of scale is Server-Side Ad Insertion (SSAI) enabling media owners to create a seamless viewing experience by inserting ads into high-quality, long-form content – essentially replicating the viewing experience of TV while winning brands more flexibility and granular targeting. This has big potential to maximize ad revenue by opening up scale.

With the growing importance of multi-screen touchpoints, SSAI's ability to enable smooth delivery across varying devices (mobile, CTV, etc) is a major advantage. However publishers need to partner with ad servers and Supply-Side Platforms (SSPs) that can streamline and track audience attribution and ad delivery across formats.

2. TURNING ON PROGRAMMATIC ACTIVATION

Some publishers in APAC are trialing and activating live linear but have yet to turn on the programmatic monetisation tools to drive greater revenues and monetise supply bursts.

With increased fragmentation, live video publishers benefit from programmatic tools that help monetise their inventory and track performance and impressions, to manage budgets and optimise campaigns.

3. UNIFIED AUCTIONS

A seamless ad experience, particularly live broadcast, also requires the right tools to manage ad breaks while effectively maximizing yield across all demand. Programmatic demand is necessary and should be leveraged with direct demand to maximize ad breaks with a large diverse pool of advertisers. With unified auctions, this unlocks greater control and flexibility for publishers to efficiently compete programmatic and direct demand.

4. ENHANCED AD EXPERIENCE WITH AD PODS

Ad pods have been a key OTT advantage by enabling ad frequency control, where a mix of ads are sequenced together, much like a linear TV commercial break. New technology can further enhance these ad pods, filling ad slots with contextually relevant, brand-appropriate content that ensures creative deduplication and competitive ad separations. With this, brands can drive efficient impact and ROI across audience touch points in a controlled way without overly repetitive ads.

Live broadcast delivery is an area where advanced technology such as Magnite's Live Stream Accelerator (LSA) can enable publishers to monetise CTV further programmatically. Media buyers can reach engaged audiences at scale in live environments while publishers can better manage large spikes of ad requests for live supply without overburdening their technical infrastructure.

5. MEASUREMENT

Adopting region-specific standards for live linear content delivery and quality controls are needed for live OTT to truly take off. Marketers will want to see stronger reporting that goes beyond viewability and completion rates to account for audience attribution. Solving the challenges of ad measurement will require a phased approach where all industry players need to work towards a common currency.

Ultimately, engagement with live linear OTT channels is booming — and as more audiences in APAC go online to stream video content, OTT and CTV investment is positioned to expand with ad budgets following suit. With more budgets moving from broadcast TV to OTT (or a mix of both), live OTT programming provides a natural fit for advertisers looking to build incremental reach with linear audiences.

As the growing OTT APAC market evolves to prioritise programmatic trading tools, video publishers and marketers will have a unique opportunity to drive campaign outcomes at an unprecedented scale. ■

by Gavin Buxton
Managing Director, Asia, Magnite

We're ***Magnite (NASDAQ: MGNI)****, the world's largest independent sell-side advertising platform. Publishers use our technology to monetize their content across all screens and formats including CTV, online video, display, and audio. The world's leading agencies and brands trust our platform to access brand-safe, high-quality ad inventory and execute billions of advertising transactions each month.*

PubMatic

CTV PUBLISHERS BENEFIT
FROM SEPARATED DEMAND & TECH PLATFORMS

Recently, publishers have been presented with a host of new technology partnership options that are shifting the dynamics between programmatic technology and sources of demand. In Connected TV (CTV), vendors are forcing preferential inventory access and proprietary technology just for them to access demand, a scenario that is all too familiar to CTV publishers with programmatic video and display inventory. CTV publishers are also experiencing déjà vu with issues that compare to competing display wrappers and demand partners moving down the funnel to be closer to suppliers. Now more than ever, publishers need to ensure that they don't back themselves into a corner with CTV.

To get the best price and highest amount of fair competition for their inventory, CTV publishers should select ad tech platforms and demand partners through separate processes. The best tech platform for a publisher may be from a vendor that also provides demand or maybe from a vendor that provides technology only. However, publishers need a consistent, objective framework to make choices that will benefit their short-term revenue goals along with long-term growth and independence. As an industry, the pressures being put on publishers to bundle tech and demand partnerships signal that it is a good time to create new transparency and fairness standards for CTV.

BEWARE OF FIRST LOOKS

Both auction theory and years of empirical evidence tell us that publishers achieve the best yields when multiple bidders compete simultaneously in a transparent and fair unified auction – even for Private Marketplace (PMP) deals. One aspect of the waterfall that is often overlooked is that they are highly beneficial to the demand partner at the top of the waterfall, which reduces competition for the publisher. The partner that has the first look at inventory sees all the inventory but is not subject to price competition. The same holds true for PMP and other deals where buyers are competing on price – if one partner has preferred access, the publisher isn't getting the highest price across demand sources.

Demand partners that have that privileged top of the waterfall position – or get first preferred access to deals – are often tempted to discourage publishers from moving to a unified auction because they know the extra competition will hurt their fill rates even as the publisher benefits from that additional bid density on every impression. One method that self-interested demand partners can use to thwart a move to unified auctions is to refuse to bid into them or insist they can only be called from tech platforms they provide which may still give them a first look.

Publishers encountering resistance to demand partners running in a unified auction should see this resistance as a red flag that the partner is favoring their own interests rather than working to get the publisher maximum yield.

BEWARE OF THE TOLL GATE

Another reason that vendors may try to tie part of the ad stack together is to establish a toll gate (aka revenue collection opportunity) on external demand sources. If an ad server vendor effectively forces publishers to source programmatic demand through a programmatic path they control, there is likely to be toll gate now or in the future. Publishers should seek out innovative capabilities that make it easier to connect their parts of the stack to the rest of the ecosystem without any tolls.

With web display, there are multiple options for how to connect demand sources and that means publishers can choose the path that is best for them. We are at a critical point in the evolution of programmatic CTV advertising where we are collectively deciding whether the future will be one where publishers can freely choose the technology platforms and demand that suit them best or whether those choices will be tied to together in ways that create sub-optimal outcomes for the entire ecosystem. If those choices exist, then vendors that offer the best value and efficiency will be winners. If those choices are curtailed, then the vendors with the largest legacy footprints will be the winners. The pie will be much larger if value and efficiency are rewarded.

CTV NEEDS A CODE OF CONDUCT

As header bidding took off for display ads on the web, many ecosystem participants were concerned about unfair auctions and vendors controlling the wrapper favoring their own demand. The success of Prebid.js and the principles of Prebid.org addressed this issue. Prebid.org promoted fairness and transparency through its Code of Conduct which required all member companies to abide by a set of rules that ensured fair auctions.

PubMatic

By setting standards that ensured fair and transparent auctions, Prebid provided publishers the option to choose their tech stack separately from their demand partners which meant publishers could find the combination that maximized their yield and best served their needs.

Unfortunately, CTV unified auctions are not heading in the same direction. Too many vendors are trying to leverage their demand for preferential access or trying to use control of one part of the ad stack to restrict publisher choice in other components. In order for programmatic CTV to become a fair and transparent marketplace, we need the principles that Prebid.org championed on the web to become industry standard for CTV, such as having a fair wrapper and to design for interoperability.

Demand partners should be willing to bid into unified auctions where the operator has agreed to fair and transparent auctions. Vendors throughout the stack should be willing to interoperate with publisher's choice of components and not restrict publishers to using their full stack. These changes won't happen unless publishers insist their vendors adhere to principles of fairness, transparency and interoperability. ■

by Vijay Kunduri
Regional Vice President, OTT/CTV, PubMatic

PubMatic (Nasdaq: PUBM) *is an independent technology company maximizing customer value by delivering digital advertising's supply chain of the future. PubMatic's sell-side platform empowers the world's leading digital content creators across the open internet to control access to their inventory and increase monetization by enabling marketers to drive return on investment and reach addressable audiences across ad formats and devices.*

xandr

IF YOU BUILD IT, WILL THEY COME?

CTV AND OTT IN ASIA

As ever with the digital ad industry, things are changing fast, led by consumer preferences and advances in technology. Throughout the pandemic, consumers across the globe turned their attention toward more engaging formats, seeking out video-on-demand on any screen, consuming short-form and long-form content on their smartphones, tablets and Connected TVs (CTV) at increased rates. This year, it has become clear that post-lockdowns, these habits are here to stay, making the digital video landscape an increasingly compelling proposition for advertisers looking to meet their audience wherever they choose to be.

While consumer habits and the digitization of daily life have become commonplace, growth for many international markets in the OTT and CTV advertising space has at times been hampered by the challenge of scaling audiences in high quality, professionally produced content environments.

This year, at a global level, we're also experiencing several macro implications on household and living costs, such as inflation increasing, interest rates going up and discretionary spend reducing. With these things at play, we could start to see a drop in content subscriptions per household, which may cause premium content providers to look to more affordable, ad supported models to compete for new consumers while maintaining existing subscribers, offering even more opportunities for advertisers across APAC to effectively leverage CTV to reach and engage audiences.

STATE OF THE NATION: APAC

Over the last three years, I have been focused on running teams that support video marketplaces in the region. Relocating from Sydney to Singapore in 2021, I've worked across the consolidated advertising marketplace of Australia, to move to the more fragmented landscape in Southeast Asia and India, and it has been fascinating to witness the nuances of premium video buying in the region unfold.

In Taiwan, for example, there is a high rate of smart TV ownership, and we are seeing many traditional broadcasters and hardware providers wanting to enter the programmatic marketplace for the first time. On the other hand, in Indonesia, there are top regional and global players such as Disney+ Hotstar, iQIYI and Viu, that provide high quality content ready for CTVs. However, the share of CTV ownership is much lower, as the majority of programmable inventory is consumed on mobile devices.

India is witnessing a particularly interesting potential inflection point, where smartphone sales are decreasing year-over-year, while smart TV ownership is on the increase; Q4 2021 saw the highest ever sales of smart TVs for the country. Coupled together with a long standing and vibrant advertising video on demand (AVOD) marketplace, we expect to see audiences grow on this newly shipped hardware and more global players like Samsung and Xiaomi increase their ad supported offerings. In addition, there has been a big shake-up from a content perspective, with the change of IPL digital rights from Disney+ Hotstar to a consortium led by Viacom18 in 2023. This is bound to change how these companies think about how to get the best yield for both their new and existing content roster.

MEASURING EFFECTIVENESS TO HELP DRIVE INCREASED ADOPTION

While buyers are eager to explore the opportunities that advertising on premium content presents, they also want to understand its effectiveness and what additional benefits can be reaped. What can they target and what results can they expect from this medium compared to their typical video buying on short-form, user generated content? Is addressable content as effective as linear TV? The key drive to increased adoption will be the ability of the industry to help marketers understand where to place premium CTV and OTT content in their marketing mix.

We've started to see an increase in case studies that promote the effectiveness and brand uplift when leveraging CTV and OTT. We've also seen methods for these studies to shift from simple questionnaires to more quantitative research based on live consumer reaction.

One study commissioned by the ShowHeroes Group in Europe, highlights the appetite of consumers for more ad-supported models, finding that 65% of all CTV viewers would be willing to watch content for free in exchange for watching ads, further supporting the notion that we can expect to see an increase in adoption of AVOD. It also provides compelling evidence of increased intention of consumers while watching CTV; CTV achieved an attention rate among European consumers of 82%, compared with linear TV's 69% and social video's 42%.

While the adoption of OTT and CTV advertising across Asia is slower than other markets such as EMEA and the US, it is exciting to witness the many opportunities and progress of the premium video landscape in the region. As an industry, it's imperative we showcase the effectiveness of CTV and OTT content and demonstrate the benefits for buyers. The advances in programmatic technology will only continue, and advertisers can create an edge by seeking out a partner that is equipped to help them maximise their investments in the format across multiple markets. ■

by Tom Dover
Director, Video Marketplace Development APAC, Xandr

Xandr *a part of Microsoft Advertising, powers a global marketplace for premium advertising. Our data-enabled technology platform, encompassing Xandr Invest, Xandr Monetize, and Xandr Curate, optimizes return on investment for both buyers and sellers, while maintaining a commitment to an open marketplace and empowering the open web globally.*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CASSIE YOO

HEAD OF CONTENT, A+E NETWORKS KOREA

A+E NETWORKS

That Special K!

It goes without saying that content needs to be compelling. Thought-provoking. Entertaining. Different. Global. And stories from Korea such as *Squid Game* (Winner of 6 Emmys including Best Actor), *Extraordinary Attorney Woo*, *Parasite* and *Narco-Saints* are a testament to the excellence of Korean content (K-Content).

When A+E Networks launched its Korea operations in 2017, our mandate was clear: create best-in-class local original content embodying the elements that make K-Content so special. Now 5 years later, we have produced almost 500 hours of unscripted (41 original programs), 80 hours of scripted shows (6 original series) and our Digital Studio has turned out 43 originals. In the process, we have had the privilege of working with some of the best producers - Group 8, Climax Studios and Taewon Entertainment, to name a few – and major broadcast networks - MBC, SBS, KBS - and OTT platforms such as WAVVE, iQiYi, Viu, Unext and Viki.

Variety shows/unscripted fare are considered the main staple of TV consumption in Korea. Tapping into this highly competitive market is key to the success of our two major channel brands – Lifetime and History Channel.

Unscripted content in Korea has always been heavily celebrity-dependent and capturing viewership while staying true to the brand has never been a walk in the park. Our strategy has been to establish content alliances with the major FTA and OTT players to bring the freshest content to our viewers. With our most recent title, *Battlegram*, we worked with the homegrown OTT player WAVVE, to create a wholly original show that encompasses the most recent trends – beauty, health, lifestyle, competition – and features a non-celebrity cast. The program debuted on WAVVE as one of the strongest tracking titles on the platform and is one of the highest ranking original unscripted shows on Lifetime.

After our first foray into scripted content production in 2017 with *The Best Time to Quit Your Job*, we expanded our premium drama production pipeline with the quintessential rom-com *Backstreet Rookie* (SBS). With the success of *Backstreet Rookie* which took the number 1 spot among all Korean dramas after its premiere on iQiYi, we released *Dramaworld* (Lifetime Korea), which is an ode to Korean dramas itself. In 2022, *Jane the Virgin*'s Korean adaptation *Woori the Virgin* (SBS) and the 100% A+E investment project *If You Wish Upon Me* (KBS) premiered. In an industry where local and global heavyweights such as WAVVE, TVING, Netflix, Disney + and Apple TV pack a sizeable arsenal of resources and dollars to dominate the dynamic K-Content space, we took an approach that set us apart from the rest. We set up the proverbial playing field so producers could take a seat at the IP table. Our open IP policy and clear business projections give production companies the incentive to take creative risks and use leverage to structure strategic deals across the board. Our philosophy is simple: shared risks, shared rewards.

We believe in the creative prowess and bravery of those that burn the midnight oil, their tenacity and resilience. The engine that kept productions going even during the darkest times of the pandemic is the engine behind the increase in Korean content consumption, up 53.5% for scripted series, 51.8% for films and 51.5% for unscripted content in comparison to pre-pandemic numbers.*

At A+E, we're committed to doing things differently. We are committed to continually improving and adapting to strengthen an ecosystem that celebrates fresh perspectives and out of the box ideas. We strive to be agile and versatile in this ever-changing industry landscape. We strive to have a shared vision with our content partners. And, yes, we believe in that ever-elusive Special K. ■

**Courtesy of Global Hallyu Trends 2022. Seoul: Korean Foundation for International Cultural Exchange)*

As a joint venture between Disney and the world's largest media group Hearst, ***A+E Networks*** *is a global media and entertainment brand portfolio that finds, cultivates, illuminates, and markets entertainment content to worldwide audiences in 41+ languages on 90+ channels including History and Lifetime on 200+ territories. A+E Korea launched two brands, History and Lifetime in October 2017 and the digital studio, 'Dalla Studio' in 2018.*

AGNES ROZARIO

DIRECTOR, CONTENT, ASTRO

astro

Championing Local Storytelling

Our decision to focus on local production and creation of IPs has been paying rewards as our local content engagement has grown from strength to strength over the years and now comprises 74% of total content consumed on Astro.

Always identifying opportunities to engage Malaysians, we led the wave of exponential growth in the film industry for local films with *Polis Evo*, *Ola Bola*, *Hantu Kak Limah* and *Paskal*. This year *Mat Kilau*, the smash hit in cinemas and our ambitious *Air Force The Movie: Selagi Bernyawa* are proof that local film makers are adept at producing films that audiences will pay for. *Abang Long Fadil 3* featuring the #1 movie star Zizan Razak and directed by Shafiq Yusuf launched with a gala premiere with fans waiting in droves and is one of the most anticipated local films of 2022.

From films, the natural fit and our more recent focus has been to add to our differentiators i.e. in the local premium scripted space - where we capitalise on more unconventional genre bending, daring stories that are able to drive conversations and engagement and with elevated production values. Our success to date has been off the back of Malaysian stories and collaborative partners resulting in the likes of *Projek: Anchor SPM* (winning recognition in the MARKies Awards and Asian Academy Creative Awards), *i-Tanggang*, *Dukun Diva*, *Penunggang Agama*, with each exceeding engagement expectations and driving connectivity amongst audiences. Our most ambitious project to date is *One Cent Thief* (premiered in October), which continues the local story thread and is the effort of our hugely creative team of writers and show runners. The creative industry has been inspiring partners, thus allowing us to scale story development, production and marketing capabilities and more innovative stories will be coming our way including *Cina Buta* and the much-anticipated *Project High Council*. Our first Chinese scripted original series *Lost & Found* dropped in October along with *Rally For Love*, our Hokkien show with badminton strongly featuring in its storyline. Indian scripted premium series, *Magarantham* also launched in August to strong audience engagement. In addition to this, we continue to be inspired by foreign formats, the latest of which is our adaptation of the hit, *Liar* from the UK. The next step is export - audiences in Singapore, Brunei and Indonesia are familiar with our shows and more recently our original drama, *The Maid*, premiered in the Philippines.

We see IP and franchise creation as a key part of our growth and pleased that *Gegar Vaganza*, the #1 Malaysian entertainment IP is in its 9th successful year and *Big Stage* is fast catching up. Our gifted comedians are going on ground with us for a nationwide tour with our hit IP *Sepahtu Reunion Live Tour* with TV viewership exceeding a million consistently. We continue to also work on adaptations of hit formats such as *All Together Now Malaysia* and *The Masked Singer Malaysia* which allow us to leverage on our knowledge of our local market and help us to keep honing our craft.

Local entertainment has never been more exciting, and we are stalwartly optimistic about the future of Malaysian content. Our commitment to developing stories, shows and the creative talent industry is as strong as ever. ■

Astro Malaysia Holdings Berhad (Astro) *is Malaysia's leading content and entertainment company, engaging with 5.5 million homes or 70% Malaysia TV households, 7,700 enterprises, 18 million weekly radio listeners, 11 million digital monthly unique visitors and 3.2 million shoppers across its content and consumer-based ecosystem.*

NICK PERCY

PRESIDENT, GLOBAL MARKETS, BBC STUDIOS

BBC STUDIOS

Why Partnership is the New King

You'll be aware of the perennial debate: 'content is king' versus 'own the audience'; owning content IP versus owning a platform. It has always been both and today, more than ever, it's about getting both content and platform working together really effectively.

At BBC Studios, we have always sought to work across the value chain, taking content IP to platform partners around the world, through content licensing arrangements with broadcasters and streamers, and through our own channels and streaming businesses, like BBC Player in Asia carried on pay TV platforms, or direct-to-consumer in the case of BritBox, our streaming joint venture in North America, Australia, South Africa and Nordics. The merger of our production and distribution entities in 2018, and more recently, the integration of the BBC's commercial news activities and the Kids and Family production team into BBC Studios, has added further scale and scope. Scope that we can bring to bear for the benefits of partners around the world.

Our priority now is to find ways to create bigger, long-lasting partnerships with platforms of all types in Asia and around the world. We have long-standing and valuable partners in Asia, such as NHK in Japan and KBS in South Korea. The market is dynamic and we are exploring new areas for commercial partnerships, like education, where we know our brand is valued. It's not easy, but there are big rewards for companies that can find the right blend of content and platform, and the right partner. It helps local partners to extend their reach globally and allows international partners to establish and build their local presence.

There are interesting examples emerging in many places and from many companies, and the number will grow as the industry evolves in response to streaming and in order to improve the streaming experience and economics. Paramount and CJ ENM recently agreed a multi-faceted deal for co-production, licensing and distribution of series and films across both companies' streaming services. This included co-developing and co-financing of English-language and Korean series. It's a neat deal that helps realise both partners' ambitions.

We aspire to expand our existing partnerships and create new ones to bring benefits from our various activities to our partners. For several years we have had framework deals in place with Tencent, which have supported co-production and content licensing activity, particularly in BBC Studios' world-leading natural history programming. More recently, the relationship has expanded to include the co-production of *Supertato*, a pre-school animation based on the hit children's books, which will go out on Tencent Video, CBeebies (the BBC's pre-school channel), and BBC iPlayer (the BBC's UK streaming platform). Further afield, among other examples, we have had long term partnership agreements in place with ZDF in Germany, covering co-production, licensing and co-development for factual and scripted programming.

We hope to do more with our valued partners in Asia. As the industry strives to find new ways to fund programming, new ways to access programming that is compelling and distinctive, and new combinations of content and platform that best serve audiences, we are confident the opportunities are there. We will need to engage together earlier in the development and production process, and we will need to be creative in bringing to bear all of the strengths of our respective organisations. The rewards will be great for Asian companies with an eye on regional and global success, and for global companies like BBC Studios that want to find the most compelling ways to serve audiences wherever they are in the world. ■

© BBC Studios' Frozen Planet II

BBC Studios, *a commercial subsidiary of the BBC Group, takes an idea seamlessly from thought to screen and beyond. Its activities span content financing, development, production, sales, branded services, and ancillaries across both its own productions, and programmes and formats made by high-quality UK independents. BBC.com, BBC Studios' global digital news platform, has 139 million unique browser visits each month.*

GREG ARMSHAW

SENIOR DIRECTOR OF STRATEGY, ASIA PACIFIC, BRIGHTCOVE

BRIGHTCOVE

Reach and Grow a Loyal Audience

The streaming TV landscape is highly competitive, with globally renowned and local platforms vying for a share of the burgeoning Asia Pacific market. Competition is stiff—there are hundreds of OTT apps competing for eyeballs, streaming audiences are large and highly diverse, and content can be expensive.

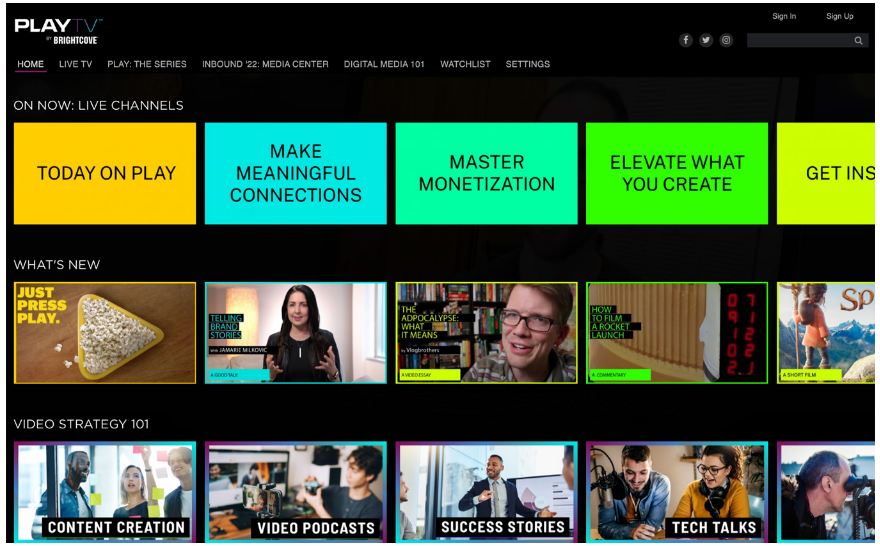
Whilst you might not have a content budget as large as Netflix (which spent $17B in 2021), building a video library—one that engages viewers over the long term—is a costly undertaking. Whatever the size of your library, understanding how your customers engage with your content is an important step to drive business growth and maximise the return on your content investment with new and existing users.

Content is a key driver of engagement, so leverage discoverable content and curated channels to fuel further growth. Enhance the viewer experience with personalised recommendations based on individual viewing preferences. Satisfying audience demand for content catered specifically to your viewer can increase watch time and retention. It also exposes audiences to new sections of your video library.

Drive effective communication through advertising or other marketing channels with tailored messaging by segmenting your audience. There's no single best approach to attracting and acquiring new streaming audiences, but ensuring your content is discoverable is key. Make sure your app and content are indexed for search and discovery to enable viewers to easily find your content. Social media and digital marketing campaigns are also great strategies to aid in OTT content discovery, to build awareness and allow for sophisticated targeting.

Offering and converting trial subscriptions or offering snippets of free content are powerful audience-building tactics for SVOD services. Viewers can experience the depth and quality of the content firsthand. Follow up with personalised communications to boost conversion rates, send relevant offers, reminders, and content recommendations to drive conversion.

Once you have acquired an audience, the focus shifts to engaging and retaining subscribers. Delivering a standout experience—one that is user-friendly, easy to engage with content and ensuring a broadcast quality video stream—is a must.



Leverage discoverable content and curated channels to fuel further growth. For fresh ideas, actionable tips and thought-provoking inspiration on using video to connect with all your audiences, visit Brightcove's own corporate streaming service, PLAYTV™ by Brightcove.

Building a loyal audience requires ongoing nurturing through regular communications on new releases and other content. Add personalisation using insights into interests, activity level, and watch history to engage individual viewers with custom content recommendations and promotional offers.

Monitoring and engaging your viewers is also critical to keep churn in check. Losing viewers means losing revenue, so engage viewers using compelling video highlights or retention offers to keep them sticky. Win-back campaigns are also profitable—offers for a discounted subscription or package upgrades are often seen as a strong incentive to return.

Leveraging audience and content insights from OTT data helps smarter decisions across the viewer journey, understanding what content to invest in to delight and retain audiences, and knowing which audiences to target to increase content engagement and revenue.

To supercharge growth, take advantage of streaming platforms that aggregate and analyse data from multiple sources—subscriptions, marketing touches, video views, and more—to give you a 360-degree view of video performance tied to customer engagement.

The OTT streaming market is rich with opportunities which can be unlocked with data driven insight and creative marketing. Are you ready to take your share? ■

Brightcove *creates the world's most reliable, scalable, and secure streaming technology solutions to build a greater connection between companies and their audiences, no matter where they are or on which devices they consume content. Brightcove's intelligent video platform enables businesses to sell to customers more effectively, media leaders to stream and monetise content more reliably, and every organisation to communicate with team members more powerfully. Visit www.brightcove.com*

GEORGE CHIEN

CO-FOUNDER, PRESIDENT & CEO, KC GLOBAL MEDIA

KC GLOBAL MEDIA ASIA

Creating a New Standard of Entertainment

KC Global Media continually pushes the boundaries of entertainment by driving creativity and innovation to new levels, and exciting our audience with groundbreaking content.

Leveraging on the multifaceted benefits of various multimedia platforms, KC Global Media has taken an enhanced perspective of our original productions by creating an integrated multimedia content experience across both video and audio entertainment. In our first year of growth, we made bold strides to innovate and establish our vision of creating Asia's new standard of entertainment by pioneering our first original crime-thriller podcast series *Fey Hollow: The Fairy Tale Murders*, featuring Singapore's home-grown talents - Lim Kay Tong, Naomi Yeo and DJ Joshua Simon. The audio-drama podcast offers a brand-new immersive take on storytelling with a unique dual ending where audiences are invited to take the wheel to choose from two different endings – making them the creator and audience at the same time. Within its first week, *Fey Hollow: The Fairy Tale Murders* reached the #1 spot of Apple's podcast fiction category and ranked #5 overall on Spotify.

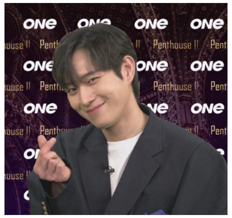
This year, we've also elevated our Asian Originals with our new docutainment production to enrich the audience's multimedia experience as integrated across linear, online and podcast platforms. Our latest production, *Secrets of the Raknus Selu Trail*, chronicles the Hakka trail of Taiwan's most iconic exports that is also a cultural and industrial link to the world. The one-hour docutainment special premiered across AXN Asia Networks, including the global release of an exclusive four-part podcast series of the same title.

Amid the pandemic, we adopted creative and innovative approaches to take our Asian original productions to the next level with some of the biggest local celebrities on two groundbreaking multimedia travel series, connecting with our fans worldwide across AXN Asia networks. In partnership with the Philippines Department of Tourism, Filipino celebrities such as celebrity couple Megan Young and Mikael Daez, Miss Universe Philippines 2019 Gazini Ganados, Marc Pingris and fellow basketball superstars JC Intal, Jayjay Helterbrand and Rico Maierhofer invited audiences from around the world on a journey to their hometowns through our lifestyle and travel reality series, *My Hometown is G.O.A.T.* Through the show, it helped those far and abroad to stay connected through a heartwarming social movement. Award-winning Indonesian celebrities, Afgansyah Reza (Afgan) and Isyana Sarasvati joined *AXN Ultimate Challenge Indonesia*, a travel reality series in partnership with the Ministry of Tourism and Creative Economy of Indonesia to explore three iconic islands in Wonderful Indonesia. With travel restrictions during these unprecedented times, we continued to bridge the gaps and collaborated with Instagram communities across the region on the first ASEAN "Insta-Meet" by engaging fans on the ultimate virtual travel experience through the art of photography. In partnership with Kansai TV, we also brought fans closer to Japan through a GEM Original travelogue series, *Budget Trip in Japan*, where Japanese celebrities, Fallindebu Hassy, Hina Kagei, Honoka Tsuchiya, Yuki Kamifuku, Wakako Hashimoto, Sumire Noda, Enis Go Okafor, and Shoko Shii took audiences on an authentic journey to discover hidden gems of Japan. More recently, presented by IKEA and filmed at the biggest IKEA store in the world, *Millennium Cooking Philippines* adds a twist to the classic cooking reality show, hosted by Filipino actor and celebrity restaurateur Matteo Guidicelli.

Our creative and innovative approaches to bringing multimedia content experiences to life are evident in our Asian Original Productions, including "live" digital content experiences where we connected fans closer to their favourite South Korean star in the first virtual fan-meet with Kim Young Dae, from ONE's top rated award-winning Korean drama series, *Penthouse*.

As Asia's leading network, we continue to enhance our premium content offerings and launched a brand-new subscription plan featuring both linear and on-demand content from Animax and GEM in partnership with Singapore's national media network, Mediacorp. Viewers in the country can now enjoy an endless stream of Japanese anime, drama, and variety programmes. As we continue to grow our mission to bring the best of entertainment to every household and mobile device across all territories, we recently concluded a multi-year deal with Mongolia's largest communication service provider with the expansion of AXN and Animax on both linear and digital platforms. KC Global Media continues to acquire the best of premium entertainment from Hollywood, Europe, Korea, Japan, and more. This year, we also expanded our premium content offering with Pay1 blockbusters movies on AXN Asia and will continue to acquire more titles from various studios in the region to provide fresh content to our audiences. ■

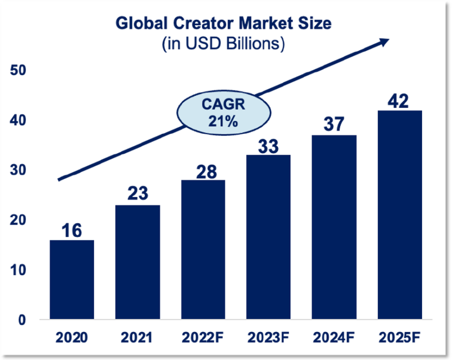
Founded by former Sony Executives, Andy Kaplan and George Chien, ***KC Global Media Asia*** *(KCGM Asia) is Asia's leading entertainment hub through the production, distribution and programming of quality, ground-breaking content. Its portfolio of premium pay TV channels in Asia includes English-language general entertainment network* ***AXN****, anime channel* ***Animax****, South Korea's* ***ONE*** *and Japanese entertainment channel* ***GEM****.*

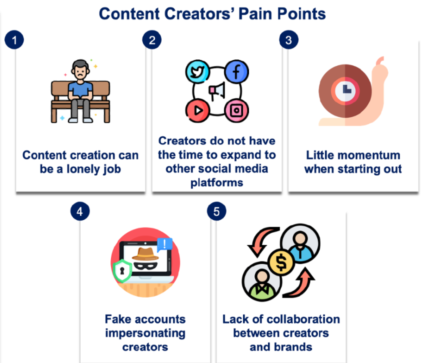


pioneer
consulting asia pacific

TACKLING THE PAIN POINTS TO REALISE GROWTH IN THE CONTENT CREATOR MARKET

As social media becomes a more integrated part of our lives, content creator marketing (better known as influencer marketing) has exploded, with over 49% of consumers depending on the creators' recommendations to make purchase decisions (source: Influencer Orchestration Network). Consumers are willing and active participants with content creators. We observe a new form of exchange between brands and consumers through original and entertaining content. And the pandemic lockdowns have reinforced the shift in consumers' preference in marketing and online commerce. As such, the content creation market is expected to grow at a CAGR of 21% from 2020 to 2025, almost doubling in size by 2025 to reach USD 42B (see below).





Source: Pioneer Consulting Asia-Pacific, Statista

Due to precise targeting, relatively low operating costs, and higher return on investment (ROI) of content creator marketing, many brands are planning to increase their spend on content creator marketing. According to Mediakix, 71% of marketers are planning to increase their budgets to work with content creators in the next year.

Despite the increase in demand for content creators, they face many challenges. Research by Pioneer Consulting Asia Pacific (PCA) has identified their pain points which are explained below:

1. CONTENT CREATION CAN BE A LONELY JOB

The creative process often requires independent thinking and dedicated time to create. Additionally, due to it being a relatively new and niche profession, not many people can understand the struggles faced by the content creator and mentors with relevant experience are hard to find. This often leaves content creators feeling isolated.

2. CONTENT CREATORS HAVE TROUBLE EXPANDING TO OTHER SOCIAL MEDIA PLATFORMS

Being a content creator goes beyond coming up with original content ideas, filming, and editing. It also includes interacting with fans, handling brand deals, and even doing something as mundane as filing tax returns. This demands a lot of time and effort from a content creator, especially one who is just starting. The lack of manpower and financial support limits a content creator from expanding to other social media platforms and thereby limits their brand reach.

3. THERE IS LITTLE MOMENTUM WHEN STARTING OUT

Most content creators have to figure out the entire process when starting by themselves. This leads to slow progress in the beginning as they try to figure out technical issues such as the algorithm, finding their niche content, and even basics such as coming up with the right video titles and descriptions to attract viewers.

4. FAKE ACCOUNTS IMPERSONATING CONTENT CREATORS

There is a lack of support on social media platforms such as Instagram and TikTok to verify the identity of content creators (i.e. a blue verification tick on their accounts). This has led to multiple scam cases among their viewers as scammers impersonate their favorite content creators.

5. LACK OF LONG-TERM COLLABORATION BETWEEN CREATORS AND BRANDS

Collaborations between creators and brands often feel transactional and there is a lack of long-term relationship between the two. Case studies have also shown that merely transactional collaborations lead to low impact and outreach of the campaign as compared to campaigns launched by brands who foster a strong and long-standing relationship with the content creators.

So, how can businesses who want to take advantage of this growing trend step in and help tackle these pain points?

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Firstly, companies can provide content creators with content creator outreaches and networking opportunities. This will allow creators to meet alike individuals in the same field and share their experiences, struggles, and tips on how to thrive in the content creator industry. Additionally, this allows creators to tap on each other's skills and talent and reach out to a wider combined audience.

Secondly, there is a need for guidance and mentorship programs for content creators, especially for content creators who are just starting. Through these programs, content creators will not only gain skills but also gain momentum and even expand to other social media platforms.

And last and most importantly, brands should revisit their relationships with content creators. Studies on existing brand campaigns have shown that having solid relationships with content creators can continue to drive results even after the campaign is over. When brand deals are strictly transactional, content creators will see it as a contractually obligated task and the impact and outreach of the collaboration will be minimal.

The spike in demand for content creators across entertainment and marketing has made it all the more important to address these pain points so that the content creator industry can realise its growth potential. Therefore, companies and brands have an important role to step up and provide the support that content creators need. ■

Pioneer Consulting Asia Pacific *is an international management consultancy that specializes in telecoms, media, and digital. For further information, please contact us at* *info@pioneerconsultingasia.com*

WARD PLATT

FOUNDER, ROCK ENTERTAINMENT HOLDINGS

Stay Clear of Distractions When Making Content Investment Decisions

The media landscape has changed dramatically over the last five years with streaming now front and center, while traditional pay TV has had to adjust to the reality of being just another viewing choice in the household, and in most cases not the first choice. Today, channel providers need to operate their businesses more efficiently than ever and the best way to achieve this is to be disciplined and focused with each and every aspect of their operations.

Platforms want a good channel full of good content with a broad set of rights at a great price from their channel partners. Bringing full SVOD rights to the table (not just catch-up) is increasingly essential for the platforms. Other bells and whistles beyond the main content offering, like an authenticated app, are more of a distraction than real value added for the platforms.

Platform partners also want channels to stick to their strengths and for all their investment to be supporting these strengths. If you are a Hollywood entertainment channel, then all your investment should go into Hollywood content. Investing in a few hours a year of local content might help you win a few awards, but platforms will wonder why you didn't just put those dollars into more of the best content from Hollywood.

At Rock we invest in the best TV series franchises from Hollywood and beyond, whether that be on the crime procedural front (we air *Law & Order SVU*, *NCIS* and *FBI*), on the non-scripted entertainment side (we are the home of *The Masked Singer*, *Masterchef Junior* and *Come Dance with Me*), on the Blockbuster movie front (where we will be showcasing all four *Indiana Jones* films ahead of the theatrical launch of the newest movie in the franchise) or in the factual entertainment space where *The Wine Show* and *New Kids In The Wild* have been knocking it out of the park for Global Trekker and Love Nature 4K respectively. We distribute 7 brands in total, and in most cases we make available these brands as linear services as well as on demand (both SVOD and AVOD). We are also flexible in how we package our offering, in some cases being part of the basic channel package, in other cases retailed as a separate Rock 24/7 pack and lastly offered as a branded AVOD, SVOD or FAST service on other platforms.

Linear television and pay TV will be around for a long time to come, but the value proposition has changed for the consumer, and channel providers must work more carefully than ever with their platform partners to provide a product of perceived value for which there will be ongoing demand. This will only get more difficult with the proliferation of more premium as well as ad supported streaming products. ■

Rock Entertainment *distributes content via Linear pay TV channels, branded and unbranded across the globe. We offer a portfolio of brands that includes Love Nature 4K, ZooMoo Networks, Smithsonian Channel, ROCK Entertainment, ROCK Extreme, Makeful, and Global Trekker, which covers a wide range of programming from natural history, lifestyle, entertainment, Kids, factual and more!*

MEASUREMENT GUIDE

TELEVISION AUDIENCE MEASUREMENT 2022-2023

MARKETS	RESEARCH COMPANY	PEOPLEMETER PANEL SIZE (HOMES/HOUSEHOLDS)	RETURN PATH DATA (RPD) PANEL	PANEL COVERAGE	CABLE/ SATELLITE MEASURED	DTT MEASURED	INTERNET, TABLETS & SMARTPHONES	VOD &/OR OTT SERVICES MEASURED	COMMERCIAL BREAK RATINGS FOR PAY-TV CHANNELS	COMMERCIAL SPOT LOGS FOR PAY-TV CHANNELS	PAY-TV REACH & FREQUENCY AVAILABLE	TIME SHIFT VIEWING MEASURED	SOFTWARE
AUSTRALIA	Nielsen TAM on behalf of OzTAM	5,250 (Metropolitan) 2,120 (National subscription TV)	No	Metro areas (5 cities) & nationally for Subscription TV	Yes	Yes	No	National Video player data reported separately	No	No	Yes	Yes	User choice*
	Nielsen TAM on behalf of Regional TAM	3,198 (Regional)	No	Queensland, Northern NSW, Southern NSW, Victoria, Tasmania & Regional Western Australia	Yes	Yes	No	No	No	No	Yes	Yes	User choice*
CAMBODIA	Kantar Media	795 Homes (Diaries)		Phnom Penh, Siem Riep & Battambang	Yes	Yes	No		Yes	Yes	Yes		Instar Analytics
CHINA	CSM	37,350	National panel: 500,000 Smart TV Device & 52 City panel: 200,000 Smart TV Device	1 national meter panel, 78 city meter panels, 12 provincial meter panels, 39 diary city panels, 13 diary provincial panels	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Infosys+
HONG KONG	CSM & Kantar Media	1,000	No	HK Region	Cable-Yes Satellite--Yes, limited to monitoring list of AMS channel"	Yes	From 2019	Yes	No	No	Yes for subscribers	Yes	Instar Analytics
	CSM Media Research		2,000 homes	HK Region; Now TV subscriber base	Yes (Now TV channels only)	No	Yes	Yes	No	Yes	Yes	Yes	Instar Analytics
INDIA	BARC India	49,000	BARC India is a member of the Joint Working Group (JWG) set up by Ministry of I&B to explore RPD capabilities in the context of TV audience measurement.	All India (Urban + Rural)	Yes	No	No	No	Yes	Yes	Yes	Yes	Yumi Analytics
INDONESIA	Nielsen	2,578 (Terrestrial) 640 (Pay-TV)	2,000 panel for Indohome (UseeTV) - exclusive	11 major cities	Yes	Yes	Yes, in Digital Ad Ratings (DAR) & Total Ad Ratings (TAR)	No	No	Yes	Yes	No	Arianna
JAPAN	Video Research Ltd	10,700 household (sample age>4)	No	32 regions including Kanto, Kansai, Nagoya, Fukuoka, Sapporo, Sendai, Hiroshima, Shizuoka, Nagano, Fukushima, Nigata, Okayama&Kagawa, Kumamoto, Kagoshima, Nagasaki, Kanazawa, Yamagata, Iwate, Tottori&Shimane, Ehime, Toyama, Yamaguchi, Akita, Aomori, Oita, Okinawa, Kochi, Yamanashi, Fukui, Tokushima, Saga, Miyazaki	Yes	No	No	No	No	No	Yes	No	cs/NEX

*Survey Notes: **Japan**, Video Research Ltd: Peoplemeters in Tokyo & Osaka. Non-continuous measurement, 2 week sweeps conducted every two months (12 weeks/year). Subscription TV panel is separate from national terrestrial TV panel of 5,100 homes, 52 weeks reporting/year*

**1 : Tokyo 30km area *2 : main area, 5 Pref. *3 : main area of Chukyo, 3 Pref. *4 : main area of northern Kyushu *5 : Sapporo city*

TELEVISION AUDIENCE MEASUREMENT 2022-2023

MARKETS	RESEARCH COMPANY	PEOPLEMETER PANEL SIZE (HOMES/HOUSEHOLDS)	RETURN PATH DATA (RPD) PANEL	PANEL COVERAGE	CABLE/ SATELLITE MEASURED	DTT MEASURED	INTERNET, TABLETS & SMARTPHONES	VOD &/OR OTT SERVICES MEASURED	COMMERCIAL BREAK RATINGS FOR PAY-TV CHANNELS	COMMERCIAL SPOT LOGS FOR PAY-TV CHANNELS	PAY-TV REACH & FREQUENCY AVAILABLE	TIME SHIFT VIEWING MEASURED	SOFTWARE
MALAYSIA	Nielsen	1,100 TV Households in Peninsular Malaysia	No	Across 11 states in Peninsular Malaysia, covering both urban and rural	Astro Pay-TV & Njoi (Free Sat)	Yes	Yes, Digital Ad Ratings (DAR) inclusive of Desktop & Mobile	No	No	No	Yes	No	Arianna
MALAYSIA	Kantar		4,000 homes	Across all 13 states in Peninsular & East Malaysia, covering urban & rural	Yes (Astro Pay-TV)	No		Q1 2018	Yes (all channels)	Yes (all channels)	Yes	Yes	Instar Analytics
MYANMAR	Nielsen Media Myanmar	1,000+ HH, M-Diary Panel 6,000+ Individuals	No	6 Key Cities within metro & urban	Yes	Yes	No	No	Yes	Yes	Yes	No	Arianna
NEW ZEALAND	Nielsen	900 households (2,250 panel members)	No	National	Yes	Yes	Yes, in Digital Ad Rating (DAR) and Digital Content Rating (DCR)	No	Yes	Yes	Yes	Yes	Arianna/ eTAM
PAKISTAN	Medialogic Pakistan	3000+	Yes (RPD + METERS) Hybrid (Since Feb. 2022)	Over 100 cities Feb. 2022 onwards	Yes	N/A	No	No	Yes	Yes	Yes	No	Instar Analytics
PAKISTAN	Gallup Pakistan	National Diary Panel: 2,500 HH, 3,500 Individuals (2,000 Urban HH & 500 Rural HH)*		National (Urban+Rural)	Yes	N/A	No	No	Yes	No	Yes	No	Reporter
PHILIPPINES NATIONAL	Nielsen	National Panel: 3,500 (2,000 Urban homes (NUTAM) & 1,500 Rural homes (RTAM))	No	National (Urban+Rural)	Yes	Yes	Yes, in Digital Ad Ratings (DAR) & Total Ad Ratings (TAR)	No	Yes	Yes	Yes	No	Arianna
PHILIPPINES METRO	Nielsen	Metro Panel 1,950 (1,150 Mega Manila homes (MEGATAM) and 800 homes for 6 other Metros (MCTAM)	No	Metro Cities	Yes	Yes	Yes, in Digital Ad Ratings (DAR) & Total Ad Ratings (TAR)	No	Yes	Yes	Yes	No	Arianna
PHILIPPINES	Kantar	National Panel: 1,900 homes		National (Urban + Rural)	Yes	Yes, part of TAM panel			Yes	Yes	Yes		Instar Analytics
SINGAPORE	GFK	1,200 households and 2,000 individuals on PC/tablets/mobile devices	No	National	Yes	Yes	Yes	No	No	No	Yes	Yes (up to 28 days)	Evogenius
SINGAPORE	Nielsen for StarHub SmarTAM	-	Panel: 5,000 homes Census: 279,000 homes	StarHub TV Subscriber base	Yes	No	No	Yes for VOD	Yes	Yes	Yes	Yes	Arianna/ eTAM

TELEVISION AUDIENCE MEASUREMENT 2022-2023

MARKETS	RESEARCH COMPANY	PEOPLEMETER PANEL SIZE (HOMES/HOUSEHOLDS)	RETURN PATH DATA (RPD) PANEL	PANEL COVERAGE	CABLE/ SATELLITE MEASURED	DTT MEASURED	INTERNET, TABLETS & SMARTPHONES	VOD &/OR OTT SERVICES MEASURED	COMMERCIAL BREAK RATINGS FOR PAY-TV CHANNELS	COMMERCIAL SPOT LOGS FOR PAY-TV CHANNELS	PAY-TV REACH & FREQUENCY AVAILABLE	TIME SHIFT VIEWING MEASURED	SOFTWARE
SOUTH KOREA	Nielsen	4,144	No	National	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Arianna
	TNMS	3,200	10,000	National	Yes	Yes	No	Yes	Yes	Yes	Yes	No	Instar Analytics
SRI LANKA	Kantar	650 Homes ~ 2,350 Individuals	No	National	Yes	Yes	No	No	No	No	No	No	Media Xpress
TAIWAN	Nielsen	2,000	-	National	Yes	Yes	No	No	Yes	Yes	Yes	No	Arianna
TAIWAN (MOD)	Nielsen	-	17,000	MOD subscriber base	No	No	No	No	Yes	Yes	Yes	No	Arianna
THAILAND	Nielsen	2,400	No	National	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Arianna, eTAM (Q4, 2022)
VIETNAM	Kantar Media	National TAM (PM) 2,310 homes		National 4 cities subset	Yes	Yes	No		Yes	Yes	Yes		Instar Analytics

*Survey Notes: **Australia**, OzTAM: 5 City Metros include Sydney, Melbourne, Brisbane, Adelaide & Perth, Australia, User Choice* Gold Standard accredited software suppliers for OzTAM & Regional TAM Data (refer to https://oztam.com.au/Software.aspx). **Indonesia**, Nielsen: : Terrestrial & Pay-TV: 11 cities:Jakarta, Surabaya, Medan, Semarang, Bandung, Makassar, Yogyakarta, Palembang, Denpasar, Banjarmasin and Surakarta. **Japan**, Video Research Ltd: Peoplemeters in Tokyo & Osaka. Non-continuous measurement,2 week sweeps conducted every two months (12 weeks/year). Subscription TV panel is separate from national terrestrial TV panel of 6,600 homes, 52 weeks reporting /year. **Myanmar**, Nielsen MMRD: 6 Key Cities include Yangon, Mandalay, Nay Pyi Taw, Taunggyi, Magway, & Mawlamyine. **Pakistan**,Medialogic: 20 cities - Karachi, Lahore, Islamabad,Rawalpinidi, Faisalabad, Multan, Hyderabad, Sukkur, Gujranwala, Bahawalpur,Peshawar, Sheikhupura, Sailkot, Pakpattan, Jehlam, Kohat, Mardan, Larkana, Dadu and Quetta Pakistan, Gallup Pakistan: National diary panel include all 3 Metros (Karachi, Lahore, Islamabad/ Rawalpindi: 2,100 individuals) , 5 Large Cities (Faisalabad, Hyderabad, Multan, Peshawar, Quetta: 1,100 individuals), 10 Small Cities & Towns (Gujrat, Jacobabad, Kasur, Mardan, Pashin, Rajanpur, Rohri, Sahiwal, Sargodha, Thatta: 1,500 individuals), Rural 800 individuals. **South Korea**, Nielsen: National and over 200 pay-TV channels are monitored programme names or TVC spot logs.(Seoul, Incheon, Busan, Gwangju, Daejeon, Daegu, Ulsan, Gyungi Province, Kangwon Province, North Chungcheong Province, South Chungcheong Province, North Gyeongsang Province, South Gyeongsang Province, North Jeolla Province, South Jeolla Province, Jeju Island) South Korea, TNMS: Return Path Data panel size is 10,000 homes of KT IPTV. **Vietnam**, Kantar Media, People Meter, 1 National panel, 4 cities: Ha Noi, HoChiMinh City, Da Nang, and Can Tho, 90 TV Channels monitored Programme and TVC Spot logs.*
Please contact the research company for a comprehensive report on measurement.

SYNDICATED MEDIA SURVEYS 2022-2023

MARKETS	RESEARCH COMPANY	SURVEY	SAMPLE SIZE	PANEL COVERAGE	METHODOLOGY	DEMOGRAPHICS	CAB/SAT MEASURED	DTT	SOFTWARE	REACH & FREQUENCY
HONG KONG	Nielsen	Media Index	6,000+	All area	Face-to-Face/Online	12 - 64	Yes	Yes	Clear Decisions	Yes
AUSTRALIA	Nielsen	Consumer & Media View	30,000	National	Online	14+	Yes	Yes	Clear Decisions	No
NEW ZEALAND	Nielsen	Consumer & Media Insights	10,000	National	Recruited: CATI/Online All survey completed Online	15+	Fused with TAM data	Fused with TAM data	Clear Decisions	Yes
INDONESIA 11 cities	Nielsen	Consumer & Media View	17,000	Indonesia, 11 cities	Face-to-face/Phone interview (during COVID-19)/Online Survey	10+	Yes	Yes	Clear Decisions	Yes
MALAYSIA Peninsular only	Nielsen	Consumer & Media View	10,000	Peninsular Malaysia Only	Face-to-face or CATI (Rural)/Online (Urban)	15+	Fused with TAM data	Fused with TAM data	Clear Decisions	Yes
MALAYSIA East Malaysia	Nielsen	Consumer & Media View	2,000	East Malaysia [Kota Kinabalu (Sabah) & Kuching (Sarawak)]	Face-to-face	15+	Yes	Yes	Clear Decisions	Yes
MYANMAR	Nielsen Media Myanmar	Consumer & Media View	5,300+	National	CAPI/ CATI	10 - 64	Yes	Yes	Clear Decisions	No
PHILIPPINES National Urban	Nielsen	Consumer & Media View	10,000	National Urban	CATI-CAWI/Face-to-Face CAPI	10+	Yes	Yes	Clear Decisions	Yes
SINGAPORE	Nielsen	Consumer & Media View	4,200+	National	Face-to-face/Online/ CATI	15+	Yes	Yes	Clear Decisions	Yes (Print only)
THAILAND	Nielsen	Consumer & Media View	9,000+	National	Face-to-Face/Online	12+	Yes	Yes	Clear Decisions	No
TAIWAN	Nielsen	Media Index	10,000	National	Face-to-Face/Online	12 - 65	Yes	Yes	Clear Decisions	Yes
BANGLADESH	Kantar	National Media Survey (NMS) - TGI	16,200	National	Face-to-Face	15+	Yes	No	ThinkMedia	Yes
SRI LANKA	Kantar	National Demographic & Media Survey (NDMS) - TGI	12,500	National	Face-to-Face/CAPI	6+	Yes	No	QuestPlus	No
VIETNAM	Kantar Media	Media Habit Survey (MHS) - TGI	6 Cities (Urban) 9,352 & National (exc 6 cities) 7,200	6 cities & National	Face-to-Face/Self completed	15 - 54			Choices 4	Yes
CHINA	Sinomonitor	CMMS/H3/MMMS	CMMS - 120,000+ H3 - 12,400+ MMMS - 30,000+	CMMS - National, 108 cities (tier 1-5) H3 - National, 20 cities (tier 1-3) MMMS - National, 46 cities (tier 1-3)	Face-to-Face/Self completed/Online	CMMS - 15-64 H3 - 18-50 MMMS - 15-64	Yes	No	Telmar DataTile	No
INDIA	IMRB	India	51,000	National	Face-to-Face/Self completed	15 - 55 ABC				

SYNDICATED MEDIA SURVEYS 2022-2023

MARKETS	RESEARCH COMPANY	SURVEY	SAMPLE SIZE	PANEL COVERAGE	METHODOLOGY	DEMOGRAPHICS	CAB/SAT MEASURED	DTT	SOFTWARE	REACH & FREQUENCY
HONG KONG	Ipsos	Media Atlas	2,000	Hong Kong	Online/Face-to-Face	18 - 64	No	Yes	Telmar	Yes
11 ASIA MARKETS	Kantar	TGI Global Quick View	85,000	Australia, China, Hong Kong, India, Indonesia, Japan, Phillipines, Singapore, South Korea	Online	16+	Yes	Yes	Choices 4 Online	Yes
	Ipsos	Affluent Asia	19,480	Hong Kong, Singapore, Malaysia, Taiwan, Thailand, Indonesia, Philippines, Korea, India, Australia, China	Online	Affluent/BDM/ Top Management Age 18 - 74	Yes	Yes	User choice	Yes
12 ASIA MARKETS	Ipsos	GBI (Global Business Influencer Survey)	7,064	Australia, China, Hong Kong, India, Indonesia, Japan, Malaysia, Philippines, Singapore, South Korea, Taiwan, Thailand	Online	Senior business execs in companies with 50+ employees	Yes	No	User choice	Yes
14 ASIA MARKETS	GWI	GWI Core research	353,525 (annually)	Australia, China, Hong Kong, India, Indonesia, Japan, Malaysia, New Zealand, Philippines, Singapore, South Korea, Taiwan, Thailand, Vietnam	Online	16-64 year old internet users	Yes		GWI PRO Platform	Yes

DIGITAL AUDIENCE MEASUREMENT 2022-2023

MARKETS	RESEARCH COMPANY	SIZE OF PANEL	PLATFORM COVERAGE	METHODOLOGY	CORE REPORTING METRICS	DEMOGRAPHICS	AUDIENCE SEGMENTATION (BEHAVIOUR)	MULTI-PLATFORM REPORTING	ONLINE VIDEO REPORTING	PLANNING TOOLS
AUSTRALIA	Nielsen	4,800 PC 3,000 smartphone 850 tablet	PC + Smartphone + Tablet	Panel only Measurement for audiences. Engagement metrics fused with census collection from tags where applicable	Audience based metrics such as Reach, page views based metrics including pageviews per person, session based metrics including sessions per person and time based metrics including time per person	Age, Gender, Income, Education & Region	Additional segments can be explored on an ad hoc, post campaign basis subject to sufficient campaign size and panel availability	Yes	n.a.	Measurement of static content on apps and websites across multiple platforms
JAPAN	Nielsen	14,500 PC 6,300 smartphone	PC + Smartphone (Android & iOS)	Not claim based but actual log behaviour based tracking	Unique Audience (000) Active Reach (%) Total Sessions (000) Sessions Per Person Total Minutes (000) Time Per Person (hh:mm:ss) Total Page Views (000) Page Views Per Person	Age, Gender, Income, Marital Status, Education, Occupation	Additional segments can be explored on an ad hoc, post campaign basis subject to sufficient campaign size and panel availability	Total audience number report is delivered as one of element in DCR	n.a.	n.a.
NEW ZEALAND	Nielsen	2,300 PC	PC Only	Panel only Measurement for audiences. Engagement metrics fused with census collection from tags where applicable	Audience based metrics such as Reach, page views based metrics including pageviews per person, session based metrics including sessions per person and time based metrics including time per person	Age, Gender, Income, Education, Occupation, Household Size and presence of children	Additional segments can be explored on an ad hoc, post campaign basis subject to sufficient campaign size and panel availability	n.a.	n.a.	Measurement of static content on desktop apps and websites
SOUTH KOREA	Nielsen	12,000 PC 7,000 Smartphone	PC + Smartphone (Android & iOS)	Panel only Measurement for audiences	Reach, Install, Time spent, Pageview, Session	Age, Gender, Region, Occupation, Marriage, Income, Lifestyle, Education	Additional segments can be explored on an ad hoc, post campaign basis subject to sufficient campaign size and panel availability	Yes	Yes	Measurement of static content on apps and websites across multiple platforms

Note: Above all DAR, TAR & DCR info reflects the Nielsen product offering after our January 2021 Digital Transformation. Further updates will be made to meet the demands of the changing industry and Nielsen will inform industry stakeholders through our press releases.

TOTAL AD RATINGS 2022 -2023

MARKETS	RESEARCH COMPANY	SIZE OF PANEL	PLATFORM COVERAGE	METHODOLOGY	CORE REPORTING METRICS	DEMOGRAPHICS	MULTI-PLATFORM REPORTING	REPORTING	PLANNING TOOLS
INDONESIA from September 2021	Nielsen	Nielsen TAM Panel - ~9,000 individuals Single source survey sample feeding probabilistic de-duplication model of 4,200, increased to 16,500 in Q1 2022. Nielsen Digital Ad Ratings -Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube. Open Web properties measured using Nielsen ID Probabilistic Identity Model.	TV - Nielsen TAM - 11 Major Cities TV coverage. Digital - Nielsen DAR - Desktop, Mobile (Smartphone and Tablet, Web and App)	Uses established media trading currencies in market for Television (Nielsen TAM) and Digital Ad Ratings (DAR). De-duplication factors created using a scaled media consumption survey, calibrated back to the media currencies.	Unique Audience, Impressions, Frequency, GRP, On Target % TV Only Exposure, Digital Only, TV+Digital, Unduplicated Audience	Age & Gender	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target %
PHILIPPINES from September 2021	Nielsen	Nielsen TAM Panel - ~14,200 individuals Single source survey sample feeding probabilistic de-duplication model of 6,000. Nielsen Digital Ad Ratings -Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube.Open Web properties measured using Nielsen ID Probabilistic Identity Model.	TV - Nielsen TAM - National TV coverage. Digital - Nielsen DAR - Desktop, Mobile (Smartphone and Tablet, Web and App)	Uses established media trading currencies in market for Television (Nielsen TAM) and Digital Ad Ratings (DAR). De-duplication factors created using a scaled media consumption survey, calibrated back to the media currencies.	Unique Audience, Impressions, Frequency, GRP, On Target % TV Only Exposure, Digital Only, TV+Digital, Unduplicated Audience	Age & Gender	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target %
TAIWAN from September 2021	Nielsen	Nielsen TAM Panel - ~7,000 individuals Single source survey sample feeding probabilistic de-duplication model of 3,145 increased to 8,300 in Q1 2022.Nielsen Digital Ad Ratings -Facebook universe (millions) with calibration panel for Facebook Properties.Google universe (millions) with calibration panel for Google Video properties & Youtube.Open Web properties measured using Nielsen ID Probabilistic Identity Model.	TV - Nielsen TAM - National TV coverage. Digital - Nielsen DAR - Desktop, Mobile (Smartphone and Tablet, Web and App)	Uses established media trading currencies in market for Television (Nielsen TAM) and Digital Ad Ratings (DAR). De-duplication factors created using a scaled media consumption survey, calibrated back to the media currencies.	Unique Audience, Impressions, Frequency, GRP, On Target % TV Only Exposure, Digital Only, TV+Digital, Unduplicated Audience	Age & Gender	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target %
THAILAND from September 2021	Nielsen	Nielsen TAM Panel - ~8,000 individuals Single source survey sample feeding probabilistic de-duplication model of 6,000 increased to 8,900 in Q1 2022.Nielsen Digital Ad Ratings -Facebook universe (millions) with calibration panel for Facebook Properties.Google universe (millions) with calibration panel for Google Video properties & Youtube. Open Web properties measured using Nielsen ID Probabilistic Identity Model.	TV - Nielsen TAM - National TV coverage. Digital - Nielsen DAR - Desktop, Mobile (Smartphone and Tablet, Web and App)	Uses established media trading currencies in market for Television (Nielsen TAM) and Digital Ad Ratings (DAR). De-duplication factors created using a scaled media consumption survey, calibrated back to the media currencies.	Unique Audience, Impressions, Frequency, GRP, On Target % TV Only Exposure, Digital Only, TV+Digital, Unduplicated Audience	Age & Gender	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target %
MALAYSIA from May 2022	Nielsen	Nielsen TAM Panel - ~5,000 individuals Single source survey sample feeding probabilistic de-duplication model of 5,000. Nielsen Digital Ad Ratings -Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube.Open Web properties measured using Nielsen ID Probabilistic Identity Model.	TV - Nielsen TAM - Peninsula Malaysia TV coverage. Digital - Nielsen DAR - Desktop, Mobile (Smartphone and Tablet, Web and App)	Uses established media trading currencies in market for Television (Nielsen TAM) and Digital Ad Ratings (DAR). De-duplication factors created using a scaled media consumption survey, calibrated back to the media currencies.	Unique Audience, Impressions, Frequency, GRP, On Target % TV Only Exposure, Digital Only, TV+Digital, Unduplicated Audience	Age & Gender	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target %
JAPAN from April 2022	Nielsen	Nielsen Digital Ad Ratings -Facebook universe (millions) with calibration panel for Facebook Properties.Google universe (millions) with calibration panel for Google Video properties & Youtube. Open Web properties measured using Nielsen ID Probabilistic Identity Model. Video Research TAM Panel is a 3rd party partner of Nielsen in Japan for Cross-Platform measurement - ~22,000 individuals Single source survey sample feeding probabilistic de-duplication model of ~20,000.	TV - Video Research TAM - Kanto TV coverage. Digital - Nielsen DAR - Desktop, Mobile (Smartphone and Tablet, Web and App)	Uses established media trading currencies in market for Television (Video Research TAM) and Digital Ad Ratings (DAR). De-duplication factors created using a scaled media consumption survey, calibrated back to the media currencies.	Unique Audience, Impressions, Frequency, GRP, On Target % TV Only Exposure, Digital Only, TV+Digital, Unduplicated Audience	Age & Gender	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target %

Note: Above all DAR, TAR & DCR info reflects the Nielsen product offering due to Digital Transformation in the near future. Further updates will be made to meet the demands of the changing industry and Nielsen will inform industry stakeholders through our press releases.

DIGITAL AD RATINGS 2022-2023

MARKETS	RESEARCH COMPANY	SIZE OF PANEL	PLATFORM COVERAGE	METHODOLOGY	CORE REPORTING METRICS	DEMOGRAPHICS	AUDIENCE SEGMENTATION (BEHAVIOUR)	MULTI-PLATFORM REPORTING	REPORTING	PLANNING TOOLS
AUSTRALIA JAPAN	Nielsen	Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube. Open Web properties measured using Nielsen ID Identity Model	Desktop, Mobile (Smartphone and Tablet, Web and App) Including Youtube In-App	Panel, Survey, Census Collection from Tags, Facebook Attribution, Google ADH, Nielsen ID identity system for Open Web, SDK or Platform Integration	Unique Audience, Tracked Ads, Frequency, GRP, On Target %	Age & Gender	Additional segments can be explored on an ad hoc, post campaign basis subject to sufficient campaign size and panel availability	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target % Custom Media Analytics tools available to visualise DAR data
HONG KONG INDIA INDONESIA MALAYSIA NEW ZEALAND PHILIPPINES SINGAPORE TAIWAN THAILAND	Nielsen	Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube. Open Web properties measured using Nielsen ID Identity Model	Desktop, Mobile (Smartphone and Tablet, Web and App) Including Youtube In-App	Panel, Survey, Census Collection from Tags, Facebook Attribution, Google ADH, Nielsen ID identity system for Open Web, SDK or Platform Integration	Unique Audience, Tracked Ads, Frequency, GRP, On Target %	Age & Gender	Additional segments can be explored on an ad hoc, post campaign basis subject to sufficient campaign size and panel availability	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target % Custom Media Analytics tools available to visualise DAR data
SOUTH KOREA	Nielsen	Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube.	Desktop, Mobile (Smartphone and Tablet, Web and App) Including Youtube In-App	Panel, Survey, Census Collection from Tags, Facebook Attribution, Google ADH, SDK or Platform Integration	Unique Audience, Tracked Ads, Frequency, GRP, On Target %	Age & Gender	-	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target % Custom Media Analytics tools available to visualise DAR data

DIGITAL CONTENT RATINGS 2022-2023

MARKETS	RESEARCH COMPANY	SIZE OF PANEL	PLATFORM COVERAGE	METHODOLOGY	CORE REPORTING METRICS	DEMOGRAPHICS	AUDIENCE SEGMENTATION (BEHAVIOUR)	MULTI-PLATFORM REPORTING	REPORTING	PLANNING TOOLS
AUSTRALIA	Nielsen	Nielsen machine learning algorithms along with Nielsen Digital Panel	Desktop, Mobile (Smartphone & Tablet, Web & App)	Panel, Survey, Census Collection from Tags, SDK or Platform Integration & Machine Learning	Reach, Time Spent, Page Views, App Launches, Platform, Content Type, Unique Audience, and Categories	Age & Gender	Additional segments can be explored on an ad hoc basis	Yes	Measurement of digital video and static content Reach, Time Spent, Page Views, App Launches, Platform, Content Type, Unique Audience, and Categories	Measurement of video & static content, apps, audio, etc.
JAPAN	Nielsen	Nielsen machine learning algorithms along with Nielsen Digital Panel	Desktop, Mobile (Smartphone & Tablet, Web & App)	Panel, Survey, Census Collection from SDK and Platform Integration	Reach, Time Spent, Page Views, App Launches, Platform, Content Type, Unique Audience, and Categories	Age & Gender	Additional segments can be explored on an ad hoc basis	Yes	Measurement of digital video and static content Reach, Time Spent, Page Views, App Launches, Platform, Content Type, Unique Audience, and Categories	Measurement of video & static content across web and apps
NEW ZEALAND	Nielsen	Volumetrics only (Separate panel based hybrid service in market)	Desktop, Mobile (Smartphone & Tablet, Web & App)	Census Collection from Tags & SDK	Time Spent, Page Views, App Launches, Platform, Content Type and Categories	NA	Additional segments can be explored on an ad hoc basis	Yes	Volumetric reporting for static and video content across platforms	Measurement of video and static content, apps, audio, etc.
THAILAND	Nielsen	Volumetrics only	Desktop, Mobile (Smartphone & Tablet, Web & App)	Census Collection from SDK	Time Spent, Page Views, App Launches, Platform, Content Type and Categories	NA	Additional segments can be explored on an ad hoc basis	Yes	Volumetric reporting for static and video content across platforms	Measurement of video and static content, apps, audio, etc.

Note: Above all DAR, TAR & DCR info reflects the Nielsen product offering due to Digital Transformation in the near future.
Further updates will be made to meet the demands of the changing industry and Nielsen will inform industry stakeholders through our press releases.

DIGITAL AUDIENCE MEASUREMENT 2022-2023

MARKETS	RESEARCH COMPANY	SIZE OF PANEL	PLATFORM COVERAGE	METHODOLOGY	CORE REPORTING METRICS	DEMOGRAPHICS	AUDIENCE SEGMENTATION (BEHAVIOUR)	MULTI-PLATFORM REPORTING	REPORTING	PLANNING TOOLS
AUSTRALIA CHINA HONG KONG JAPAN SINGAPORE TAIWAN VIETNAM	Comscore	2 million-person global human panel and extensive Comscore census network	Desktop, Mobile (Smartphone and Tablet, Web and App)	People Panel, Enumeration Survey, Server Tags, SDK	Unique Visitors, Minutes, Page Views, Visits	Age, Gender, Expanded Demographics* (depending on market and product)	Yes	Yes	Unique Video Viewers, VideoStreams, Viewing Duration, Total Minutes	Campaign Reach/Frequency, Video Reach/Frequency
INDIA	Comscore		Desktop, Mobile (Smartphone and Tablet, Web and App)	People Panel, Enumeration Survey, Server Tags, SDK	Unique Visitors, Minutes, Page Views, Visits	Age, Gender, Expanded Demographics* (depending on market and product), State Level Clusters	Yes	Yes	Unique Video Viewers, Video Streams, Viewing Duration, Total Minutes	Campaign Reach/Frequency, Video Reach/Frequency, Mobile and Multi-Platform Reach/Frequency, Plan Metrix Multi-Platform
INDONESIA MALAYSIA	Comscore		Desktop, Mobile (Smartphone and Tablet, Web and App)	People Panel, Enumeration Survey, Server Tags, SDK	Unique Visitors, Minutes, Page Views, Visits	Age, Gender, Expanded Demographics* (depending on market and product)	Yes	Yes	Unique Video Viewers, Video Streams, Viewing Duration, Total Minutes	Campaign Reach/Frequency, Video Reach/Frequency, Mobile and Multi-Platform Reach/Frequency
NEW ZEALAND	Comscore		Desktop, Mobile (Smartphone and Tablet, Web and App)	People Panel, Enumeration Survey, Server Tags, SDK	Unique Visitors, Minutes, Page Views, Visits	Age, Gender	Yes	No	Unique Video Viewers, Video Streams, Viewing Duration, Total Minutes	Campaign Reach/Frequency, Video Reach/Frequency

Note: Above all DAR, TAR & DCR info reflects the Nielsen product offering after our January 2021 Digital Transformation. Further updates will be made to meet the demands of the changing industry and Nielsen will inform industry stakeholders through our press releases.

DIGITAL ADVERTISING AND AUDIENCE VALIDATION 2022-2023

MARKETS	RESEARCH COMPANY	PANEL SIZE	CAMPAIGN AD FRAUD & INVALID TRAFFIC DETECTION	CAMPAIGN VIEWABILITY	CAMPAIGN BRAND SAFETY	GEOGRAPHIC AD DELIVERY
AUSTRALIA	Comscore	Internet Universe	Yes	Yes	Yes	Yes
CHINA	Comscore	Internet Universe	Yes	Yes	Yes	Yes
HONG KONG	Comscore	Internet Universe	Yes	Yes	Yes	Yes
INDIA	Comscore	Internet Universe	Yes	Yes	Yes	Yes
INDONESIA	Comscore	Internet Universe	Yes	Yes	Yes	Yes
JAPAN	Comscore	Internet Universe	Yes	Yes	Yes	Yes
MALAYSIA	Comscore	Internet Universe	Yes	Yes	Yes	Yes
NEW ZEALAND	Comscore	Internet Universe	Yes	Yes	Yes	Yes
SINGAPORE	Comscore	Internet Universe	Yes	Yes	Yes	Yes
TAIWAN	Comscore	Internet Universe	Yes	Yes	Yes	Yes
VIETNAM	Comscore	Internet Universe	Yes	Yes	Yes	Yes

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