

# ASIA VIDEO PULSE

THE NEWSLETTER OF THE ASIA VIDEO INDUSTRY ASSOCIATION



**2023**

**EVENTS**

**OTT SUMMIT**

**29 - 30 MARCH**  
SINGAPORE

**FUTURE OF  
VIDEO INDIA**

**13 APRIL**  
MUMBAI

**TAIWAN IN  
VIEW**

**4 MAY**  
TAIPEI

## Time to Reflect & Recharge

I don't think I am alone in always having very conflicting feelings at this time of year. On the one hand I really don't know where the year has gone but at the same time when I look back I'm amazed by how much has happened - particularly this year as we have seen the transition from COVID life back to real life.

Running an industry association across as wide and diverse a number of markets as we have in Asia is all about connecting and engaging with our members and the issues that they are facing in their markets. This has been particularly difficult when travel was restricted and so the second-half of this year has very much been making up for lost time and reconnecting with our members across the region.

I am happy to say that we have been able to visit many of our markets over the previous months and have been in Indonesia, Malaysia, Thailand, the Philippines, Hong Kong, Taiwan and South Korea. The glaring omission has been India where so much has been happening in our industry and particularly from a regulatory point of view. This is something we plan to rectify first thing in the new year.

# 2023 EVENTS

## SATELLITE INDUSTRY FORUM

6 JUNE  
SINGAPORE

## THAILAND IN VIEW

6 JULY  
BANGKOK

## INDONESIA IN VIEW

31 AUGUST  
JAKARTA

## ASIA VIDEO SUMMIT

30 OCT - 2 NOV  
HONG KONG

As I look back on the activities of AVIA over the last year, I have a strong sense of satisfaction combined with a complete absence of complacency. The satisfaction comes from all of the work that we have been doing - engaging in so many regulatory issues and debates on behalf of the industry, raising awareness of copyright theft and protecting the rights of our members through regular blocking actions of infringing websites and apps, and bringing so many people together in Korea and Indonesia with our *In View* events, and finally closing the event calendar off in Singapore with the Asia Video Summit, to discuss both the challenges and opportunities we see in the curated video industry. I do genuinely feel that the industry is stronger and healthier because of the work that we have engaged in together with our members and as each year passes I believe more strongly that our fortunes are all intertwined and success comes through solidarity and simply sticking together.

The absence of complacency is a constant state of being because we know how quickly things can change and economically 2023 looks like it has the makings of a difficult year. There are strong economic headwinds and a greater focus on managing costs as a natural result. The need to stick together becomes even greater when times are difficult, in my opinion. The strength of AVIA comes from our membership and the engagement that each member brings to bear. I encourage all of our members to remain engaged and to share with us the issues that they are facing so that we can work together to continue addressing our shared concerns and issues, and charting a brighter future for all parts of our industry.

As 2022 comes to a close I hope that all of you are able to take a break and also reflect on the many successes of the year. We have come so far over the last 12 months and despite the economic and geopolitical backdrop, I am incredibly grateful that our world feels much more normal and with much more cause for optimism than there was at the start of the year. All of us at AVIA look forward to seeing and supporting you in 2023. Happy holidays to one and all.

LOUIS BOSWELL

# POLICY MATTERS



## CELESTE CAMPBELL-PITT

CHIEF POLICY OFFICER

The end of 2022 has arrived. It is hard to comprehend that another full calendar year has passed but what an eventful and inspiring one it has been with a return to in-person meetings, events and engagement. Our first in view event in Korea was a timely reminder of the value of physical meetings to share not only insights and best practices but also to simply have a conversation about issues outside of the Zoom agenda!

### STRENGTHENING COPYRIGHT PROTECTION

2022 commenced with what was one of our most challenging submissions since I joined AVIA - a response to the **Hong Kong copyright consultation paper**. Hong Kong had very promisingly expressed its interest in updating its copyright regime and strengthening copyright protection within the digital environment in an effort to potentially cement its place as the IP hub of Asia, a key objective included within the Central Government's current Five-Year Plan. Unfortunately, despite submitting a very detailed submission after some robust conversations with many of our members, we were most disappointed to learn that the legislators had decided to retain the status quo draft language, which had been agreed back in 2014. This neither took into account any of our recommendations, in particular those which related to the adoption of site-blocking measures, nor did it recognise how much technology has evolved since those initial discussions. In a market where easy access to pirated material has long been a thorn in the content industry's side, digital content providers now have little recourse to tackle copyright infringement in a timely manner other than through the current High Court injunctive measures.

### CONTENT ECOSYSTEM IN SOUTH KOREA

As an industry association which seeks to advocate for the development and growth of the entire curated content ecosystem, there may be times where not all our members can be fully aligned. In South Korea, conversations are being conducted about whether big broadcast platforms / online curated content players, in their acquisition of local intellectual property, should be compelled to either (i) share a certain portion of the earnings generated by such intellectual property with the relevant local producers or (ii) donate a portion of the profits to the local content industry.

It is an argument that is starting to manifest itself in other markets such as India and one which we are monitoring closely. AVIA has always been firmly in favour of preserving the **principle of freedom of contract** unless market conditions and the relevant competition regimes dictate otherwise. In addition, mandated payments always raise the potential of establishing barriers to entry which in turn discourage investment in the local economy. It is certainly a delicate balance and one which requires careful consideration of the issues as we advocate for frameworks which benefit the entire ecosystem.

## NETWORK USE FEES

Of course, the extent to which a regulator should afford protection to local incumbents, is a question which is especially evident than in the debate around network use fees. This debate has continued to gain traction globally in 2022 at the **Mobile World Congress** when the **Global Mobile Operators Association (GSMA)** reached consensus to call on content providers to share that cost. AVIA recently hosted a **Korea In View** event where the issue of light-touch regulation and indeed how that intersects with the network use fees discussion was discussed. Many in the room were not aware of the **Analysis Mason report** which clearly identified the actual percentage of cost that is affected by higher volume traffic usage as a mere 20% of the overall figure. It clearly demonstrates that if parties are to have a productive conversation, everyone at the table should have access to all the relevant information.



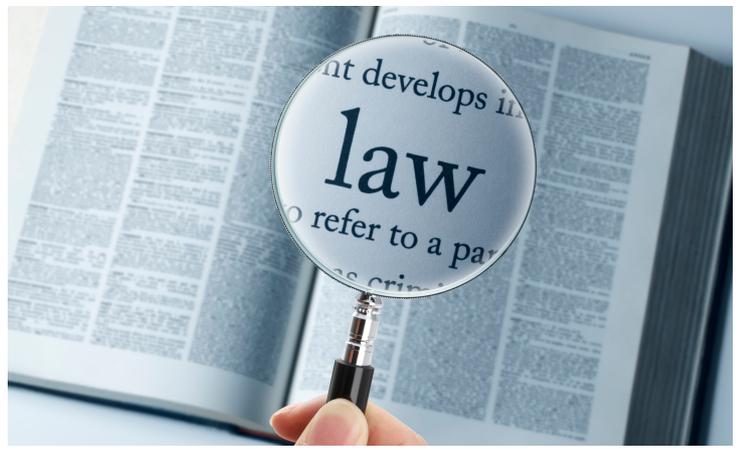
We have seen the use fees discussion raised in other guises, for example through regulation that calls for **“the maintenance of network stability” (Indonesia)**. It has therefore been reassuring to hear that Vietnam has decided to abandon its plan to introduce the provision into law on the basis that mandating this payment could potentially act as a barrier to entry to broadband access, a feature which the regulator considers to be an essential service.

In other markets, where content providers have sought to implement their own solutions by shortening the last mile of delivery through the establishment of content delivery networks and internet exchange points, regulators, like TRAI in India, have called for stakeholder feedback on whether these solution-oriented mechanisms should be regulated in the same way as ISPs currently are. Different regulators will no doubt choose to adopt different solutions to address this issue of higher broadband consumption, but for local creators who are considering expansion of their services into other markets, access payments will continue to be a concern.

## PRE-CENSORSHIP AND CONTENT TAKEDOWN

The distribution of content is secondary only to its creation. 2022 has witnessed some regulators stepping boldly into the realm of **pre-censorship and content takedown**. Often, this is justified on the basis of a need to preserve local culture and local social mores, even in instances where a very strong freedom of expression provision is embedded within the particular market's constitution. The issue as to what is considered to be offensive content remains a delicate one. AVIA's **Governance Framework** document states that we are responsible content providers who offer users the tools to decide what content they and their families are able to watch and we specifically state that we will not exhibit content that is illegal or offensive to a country's anthem or flag. It remains to be seen where different regulators will draw the line and whether the definitions of what is offensive or illegal are sufficiently clear to ensure content providers do not inadvertently fall into the zone of non-compliance.

Vietnam was recently lauded for its progressive decision to withdraw both a localisation requirement and a pre-censorship proposal from the **Cinema Law**. This joy was unfortunately short-lived when the Implementing Regulations of said Cinema Law stated “film” providers needed to secure a “Ratings license” which, in turn, came with its own set of requirements. Any content outside of what is understood to be “film” remains subject to Decree 6 which requires



the establishment of a local office (albeit a watered down version). For members, the determination of whether the more light touch Cinema Law (albeit with more regressive implementing regulations) or the more heavily-regulated Decree 6 applies, is completely dependent on whether or not content can be classified as “film”.

## PREVENTION OF ONLINE HARM

These interpretation challenges are only augmented as they start to intersect with the gathering storm that is online harm. While many of the regulations around Asia continue to be focused on preventing online harm to children, we have seen this concept expanded to cover other areas, for example harm in the form of disruption to religious and social harmony (Singapore). For our members, it is imperative that we monitor this regulation very carefully to ensure that the curated content industry is not inadvertently caught within its scope or indeed that content, which might previously have been acceptable, could now be identified as content that is potentially harmful under the terms of the specific **online harm legislation**. It is an area on which so many of our regulators in Asia are focused and we will work hard to ensure that we constantly remind them of the safety measure already employed by our members to keep our online audiences safe and secure.

## DATA PROTECTION



Staying with consumer safety, the other area in which regulation has exploded this year is that of **Data Protection**. The regulation comes in different shapes and sizes. Sometimes, it is more focused on the area of **cybersecurity** and the retention of “critical data” (however defined) through compulsory localisation, sometimes, it requires service providers to conduct audits and submit reports to regulators on the use, purpose and retention period of consumer data, and

sometimes it can be even more granular such as requiring that a service provider obtain a user’s express consent (to re-subscribe and pay the licence fee) after each payment period ends (Taiwan). We understand there is a high degree of optimism amongst privacy experts that intersections within the different markets can and are being identified. This will go a long way to building a framework which would allow regional and foreign companies to conduct business across the region in a more seamless manner. Earlier in the year, we had been concerned that the more protectionist measures, akin to those adopted in mainland China, were finding favour with certain regulators but that trend seems to be slowing.

## REGULATORY UPDATE ON INDIA

That same optimism is not present in markets where we witness ongoing regulator battles for oversight of the content industry. India has recently proposed an **India Draft Telecommunications Bill** which not only seeks to capture the regulation of the pipe infrastructure ordinarily allocated to a telecoms regulator but also the services which sit on top of that infrastructure. Within this same Bill, there are also provisions which relate to data protection despite the fact that the government has recently proposed the **Private Data Protection Act** to ensure that a cohesive body of data protection law can be put into place. We have seen a similar scenario in the **Philippines** where the MTRCB is actively looking to extend its remit over other areas, in addition to movies, including publicity material which previously fell under the ambit of the **Advertising Standards Commission**. At AVIA, we believe that it is imperative for regulators to collaborate to ensure that ease of business of promoted and the digital economy is permitted to reach its full potential.

## POLICY EVENT UPDATES



The culmination and highlight of 2022 was our **Policy Roundtable**, held at the start of this year's **Asia Video Summit**. It was a chance, finally, to return to an in-person event, bringing both members and regulators together to discuss some of these very issues. This year's packed agenda touched on current topics such as online harm and data protection, but we also took the opportunity to look into the future, with new topics on the **metaverse** and **sustainability**. This was a great chance to hear from experts and regulators as to how these areas will impact the industry going forward. As always, we are grateful for the valuable and active input we get from both regulators and members at this event and look forward to continuing some of the very active conversations going forward.

## CLOSING

So, as the year draws to a close, we have much to focus on and indeed, much to monitor. I would be very remiss in not taking this opportunity to thank you all for your ongoing support of AVIA's policy efforts around the region. With only Clare and me making up AVIA's Policy team, we simply could not do it without your insights and feedback so . . . a very big thank you from us both! All that remains to be said is to wish you all a wonderful and restful festive break wherever you may be. We look forward to seeing you all in person in 2023!

# 2023

## Calendar of Events:

29-30  
MAR

**OTT SUMMIT**

SINGAPORE

**FUTURE OF VIDEO - INDIA**

MUMBAI

13  
APR

4  
MAY

**TAIWAN IN VIEW**

TAIPEI

**SATELLITE INDUSTRY FORUM**

SINGAPORE

6  
JUN

6  
JULY

**THAILAND IN VIEW**

BANGKOK

**INDONESIA IN VIEW**

JAKARTA

31  
AUG

30 - 2  
OCT NOV

**ASIA VIDEO SUMMIT**

HONG KONG

**MORE  
INFORMATION**

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SPONSORING: [Adela@avia.org](mailto:Adela@avia.org)/ [Victor@avia.org](mailto:Victor@avia.org)



## MATTHEW CHEETHAM

GENERAL MANAGER

The Zero Gravity Pen is a pen that uses pressurised ink cartridges that enables it to write in zero gravity. The pen was developed by NASA at a cost of one million US dollars (a lot of money in the 60s) patented in 1965 and used by NASA astronauts from 1967. The Russian cosmonauts solved the same problem with pencils. Some years later NASA borrowed British Aerospace's specially designed chicken launcher to test the strength of the Shuttle's windscreens should they hit a bird strike. However, no matter how strong NASA made the windscreens, the chickens continued to fly through when tested. NASA eventually asked British Aerospace how to solve the problem. British Aerospace replied, "defrost the chickens". Both great stories. Both untrue. Piracy is a victimless crime and will never be stopped. Also both untrue as CAP's work throughout 2022 can attest.

### COLLABORATING

**The State of Piracy Summit (SOP)** is one of CAP's two annual flagship events. This year we held SOP in Singapore in November. In person attendance on either panels or at the summit itself wasn't as high as hoped but about where we expect to be as we transition to a post-COVID world with borders and travel budgets slowly adjusting back to international travel. After a review of CAP's activities for 2022 and plans for 2023, the summit kicked off with an interview with **Hermawan Sutanto**, the COO of **Vidio**, examining the impact of rolling regulatory site blocking in Indonesia, including the recent move to initiate IP blocking.

This was followed by an in-person discussion with **Jil Go**, **Kroma's** Head of Broadcast & Publishing (*pictured right*), about tackling online piracy in the Philippines where regulatory avenues to date have been relatively light, but where there may be some light on the horizon.



The second half of SOP focused on technology, beginning with a panel of **Bharat Kapoor** of **Authentix** and **Avigail Gutman** of **Synamedia** discussing both how consumers access pirate content via social media and technology platforms, as well as how pirates provide the content to these platforms, and what can be done about it. We then had a first appearance of **Meta** at a CAP summit where they talked through how they combat piracy on their various platforms.



Peter Szyszko, White Bullet (on screen) with Matt Cheetham

The summit concluded with a session with **White Bullet's** founder and CEO, **Peter Szyszko**, talking through the imminent launch of **MagiCAP 2.0** and the importance of White Bullet's piracy sites' ad revenue data to the new platform.

Lobbying for efficient and effective regulatory site blocking in the Philippines was a focus issue for CAP throughout Q3 and Q4. As part of our efforts to achieve this goal, in September CAP created and launched the **Video Coalition of the Philippines (VCP)** with members including, **Globe, Kroma, GMA, Signal, Smart** and the **NBA**. The VCP will be a vital part of the push to protect online content in the Philippines.

## ENFORCING & DISRUPTING

**Site blocking** was once again to the fore in CAP's enforcement efforts in Q3, and our efforts in Indonesia were again leading the way. In an indication of the extreme effectiveness of the rolling site blocking program, we have seen an increasing migration of Indonesia pirate sites away from domains to IP address only. Such sites cannot be blocked by traditional DNS blocking. However, the Indonesian regulator **Kominfo can now block IP addresses**, and so CAP worked with Vidio on a successful IP blocking trial in Q3 and in Q4 initiated a program of monthly referrals of 50 IP address only sites to Kominfo for IP blocking. To our knowledge, this is the **only such industry/government program in the world**.

In Q3 CAP added two new members to its **regulatory blocking program** in **Malaysia**. Doing so greatly increased expanded our footprint of sites we can block, with our September referral being three times the size of earlier referrals. However, with great power comes great problems and the Malaysian copyright body in charge of the blocking, MDTCA, slowed down their processes. CAP worked extensively with MDTCA throughout Q3 and Q4 to overcome the issues and we are hopeful the program is now back on track. Staying with blocking, further to the 99 extra domains blocked under the order obtained earlier in 2022, in Q3 and Q4 CAP also worked on another **Singapore blocking order**, that is expected to be obtained in **early 2023**.

## ENGAGING & REACHING OUT

As noted above, CAP spent a lot of time pushing for an efficient and effective **regulatory site blocking regime** in the **Philippines** in the second half of the year. We first filed an out of cycle review in August highlighting the need for such a regime to the Congressman who filed a Revised IP Code in late July.



Representative Hon. Joey Sarte Salceda

We followed this up by organising with Globe a summit dedicated to online piracy in the Philippines in early September, to which the Congressman was the keynote speaker. We then separately met with the Congressman and an influential Senator's senior staff in the Philippines later that month. Both understood the need for the Philippines to have **efficient and effective site blocking** and both asked for CAP to provide them with draft provisions to enable such a regime. We subsequently worked with our members and the MPA to draft model provisions that were provided separately to the Congressman and the Senator in November. Pushing forward on these provisions will be a focus for CAP in 2024. We also worked with Globe on a voluntary site blocking MOU in Q3 that has been parked for now as an alternate version is being worked on by MPA.

The easing of travel restrictions in the second half of 2023 also saw CAP visiting and engaging in person to push the protection of CAP member company content online with governments around the region including in **Malaysia, Taiwan, Thailand** and **Vietnam**. CAP also strengthened our relationship with the Korean broadcasters' content protection association (COA), by assisting them to identify the relevant representative from MDTCA to attend and speak at COA's annual event in Seoul.



CAP also continued our regular engagement with the two largest technology players in this space, **Google** and **Meta**. We hold regular one on one calls with each, as well as separate bi-annual Roundtables for CAP members to directly engage with key copyright representatives from both companies. Each is also invited once a year to speak at either POTT or SOP. There have been a couple of notable highlights of these engagement efforts: the first being the quarterly referral of sites blocked by CAP or its members in APAC to Meta for removal from their platforms, and; the acceptance of CAP into Google's TCRP program following which we can now refer links in bulk for faster removal from Google search. In time we hope that we can extend the program to include Google Drive, and potentially live events from Google Cloud.

## RESEARCHING, MEASURING & MONITORING

There are two central planks that under-pin CAP's research and technology efforts: the annual **YouGov consumer surveys**, and; our MagiCAP portal that tracks online traffic, including to pirate sites, around the region. CAP are now working with YouGov to initiate the annual round of consumer surveys in late 2022 with a view to having the reports released in early 2023. These surveys are key drivers of our anti-piracy efforts as they identify the areas of concern and trends in piracy around the region, and allow us longitudinal analysis of each.



The **MagiCAP** portal is an essential component of CAP's anti-piracy efforts for two reasons. Firstly, it helps us identify the most popular sites for us to block in those countries where we block. Secondly, it tracks the impact of those blocks on both traffic to the blocked sites as well as overall piracy traffic, and any impact on legitimate traffic.

This second element of the portal, and in particular its visual depiction, is a key component in CAP's lobbying efforts around the region as we can graphically illustrate the impact of the blocking on decreasing overall piracy traffic and increasing traffic to legitimate sites. **MagiCAP 2.0 will be launched in early 2023**. The portal will be stronger, faster, better than before in terms of both graphic representation and data provision as the traffic data will be enhanced by inclusion of ad piracy data.

## CLOSING

Q4 was another busy quarter for CAP as we head towards the end of a challenging but successful year in 2022. Notable highlights include: the extension of the highly efficacious rolling blocking regime in Indonesia to now include IP blocking; the expansion of our site blocking footprint in Malaysia; the intensive, all-court push for the implementation of an efficient and effective regulatory site blocking regime in the Philippines; strengthening our relationship with both Google and Meta, including novel and effective enforcement efforts with each; the move to an annual round of YouGov consumer reports, and; the imminent launch of MagiCAP 2.0.

## avia Indonesia in View

Thursday 6 October 2022  
Hotel Mulia Senayan, Jakarta

www.avia.org

#INDOINVIEW

For the first time in three years, AVIA returned to Jakarta to host Indonesia in View 2022, an event that welcomed some of the industry's biggest players for a day of discussions dissecting the opportunities for growth in this expansive market.



*Yuliandre Darwis, Indonesian Broadcasting Commission (KPI),  
Louis Boswell, AVIA*

Opening comments were made by **Yuliandre Darwis**, Commissioner with the **Indonesian Broadcasting Commission (KPI)** who talked about the development of the KPI over the last twenty years, and the hope for revisions to the broadcasting law which could see greater responsibilities given to them.

Highlights of the Indonesia in View Report, to be published by AVIA, were given by **Bettina Cavenagh**, President Director, **Clarity Research Indonesia**, outlining the state of Indonesia's video markets in the post-pandemic economy.

Pay television had plateaued and while DTH services were the biggest victims of increased broadband penetration, cable numbers were increasing meaning the overall pay TV market remained significant, even if ARPU's were under pressure. But all eyes were now on the premium OTT market. SVOD has grown by more than 50% from 2020 to 2021, to 11.5M subscribers, while digital advertising grew by 33% over the same period. This set the scene for much debate throughout the conference on the relative merits of the subscription versus the advertising led business model for OTT.

In a conversation around growth and monetization, **Hermawan Sutanto**, COO of **Vidio** talked of the need to educate the market to pay for premium OTT services and **Guntur Siboro**, Country Head for **Lionsgate Play Indonesia** further made the point that ad supported VOD (AVOD) was a different ballgame which required significant investment to monetise successfully.

In his keynote conversation, **Sutanto Hartono**, Managing Director of **EMTEK** and CEO of **SCM** and **Vidio**, discussed Vidio's emphasis on local originals and live sports as differentiators in their quest to acquire customers and keep churn down. While sports rights were expensive and not owned in perpetuity, they played a crucial role in a growth strategy.



*L to R:*

*Louis Boswell, AVIA, Lesley Simpson, WeTV and iflix Indonesia,  
Gavin Buxton, Magnite, Florencia Eka, The Trade Desk*

There was little doubt about the importance advertising played in the growth prospects for the market when **Gavin Buxton**, Managing Director, Asia for **Magnite**, **Florencia Eka**, Country Manager, Client Services, for **The Trade Desk**, and **Lesley Simpson**, Country Head for **WeTV** and **iflix Indonesia**, got together. They agreed that OTT was the natural evolution of TV and provided unique opportunities for digital advertisers given the engagement with viewers.

And while fragmentation of services was an issue, it was clear that there was more than enough scale in premium OTT as they looked forward to sustained growth in the sector.

With the tremendous interest in Indonesia as a key growth market in Southeast Asia, and the success of our event, AVIA will be hosting **Indonesia in View** again on **31 August 2023 in Jakarta**. Stay tuned for more updates! In the meantime, visit our [gallery](#) for more photos from the 2022 conference.

The annual marquee event of the Asian video industry, the Asia Video Summit, returned in full swing, hosting over 300 delegates in person and online as a hybrid conference, amidst a time of immense innovation and disruption in the video industry.



L to R: Louis Boswell, Henry Tan, Clément Schwebig, Vivek Couto

The Summit opened with clear views from industry stalwarts, **Henry Tan**, Group CEO, **Astro**, **Clément Schwebig**, Chairman, **AVIA**, and **Vivek Couto**, Executive Director, **Media Partners Asia**, that a return to profitability and a focus on revenue was much needed for sustained growth across Asia. Though Asia was a huge but diverse and difficult market, there was no doubt certain markets will continue to grow, said Couto. However, disruption was going to continue for the next few years, added Tan, and all players had to be prepared for a rollercoaster ride.

**James Gibbons**, President & Managing Director, Western Pacific, **Warner Bros. Discovery**, also shared his views on the massive changes that the industry had gone through over the last decade. While there used to be a real emphasis on subscriber growth, and the belief that the market for subscription video-on-demand was infinite, a business without an advertising component was no longer meaningful. And content was no longer an individual line of business but represented an entire franchise opportunity that enabled businesses to build a special relationship with their consumers across all touchpoints.



James Gibbons, Warner Bros. Discovery

However, while content was king, it was not an 'either or' situation, it needed to be across content, activation, distribution and pricing, said **Manish Kalra**, Chief Business Officer, **ZEE5 India**. Leading on to rebundling, **Ricky Ow**, Partner, **Quest Ventures**, also shared that it was not 'one size fits all' and that there was a need to meet personal consumer demand and at a price point that made sense. There was also the need to solve this problem as a benefit to consumers as well as content providers, for less churn and more sustainability.

The topic of sustainability was certainly one that reiterated with the panellists this year as well. **Chris Sewell**, Founder, **Net Zero Media**, felt that more verifications and guidelines were needed around businesses to help people make informed decisions. For **Globe Telecom**, **Apple Evangelista**, Head, Sustainability and Social Responsibility, while it was becoming a standard in the way they did business, there was also a need to reduce value chain emissions, both upstream and downstream.

On the advertising front, stakeholders too needed to come together as there was certainly enormous opportunity for growth in the OTT advertising space, which was currently under-indexed in Asia. For **Alex Lowes**, Vice President, Client Engagement and Growth, APAC, **Finecast**, with addressable TV becoming part of an omnichannel strategy, addressable TV was the future. However, a key challenge that still remained for **Kanika Manglik**, Regional Managing Partner, Investments Strategy, **Mindshare**, was the adoption of unified measurement.



L to R: Alex Lowes, Finecast with Kanika Manglik, Mindshare

Despite these challenges, there was still much positivity among the panellists. **Vignesh Narayanan**, CEO, **Airtel Ads**, shared his prediction that US\$200M was the addressable opportunity in India on the table over the next 2 years. Summing it up, **Alysha Dino**, Senior Director, Global Business Development, **Publica**, added that with 50% of viewers in Southeast Asia watching content online, this was a transforming time in the industry in Asia Pacific, to make these challenges into a good opportunity.

## Indonesia's Digital Revolution: Programmatic is at the Core of its Transformation

Index<sup>7</sup>  
Exchange



Indonesia is not only the fourth largest country by population, it also has one of the youngest populations in Asia, driving growth in mobile internet consumption. Unlike some emerging markets, Indonesian locals bypassed desktop and leapfrogged to smartphones, accelerating mobile adoption, and driving the e-commerce boom to its current level.

With smartphone accessibility, digital advertising exposure via mobile has skyrocketed, making Indonesia one of the fastest-growing advertising markets in Southeast Asia. By 2025 programmatic advertising will represent 53% of the total advertising budgets.

But as rapid economic digitisation boosts content accessibility, and connected devices change the role of marketing, media owners and agencies are faced with challenges. Challenges that must be overcome in order to harness the power of programmatic, connecting with consumers through their preferred device, and deliver a premium digital experience.

Find out how programmatic is bolstering Indonesia's digital revolution [here](#).

### *Website Updates:*



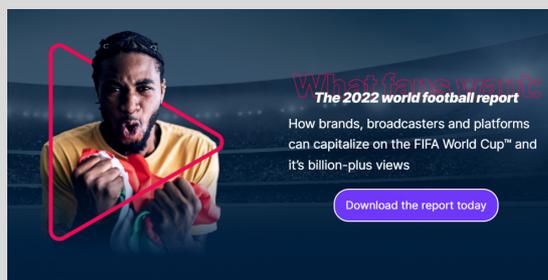
ICYMI, we have recently made some enhancements to the AVIA [website](#). We have introduced an [Industry Views](#) page where you can read up on some fascinating insights from our member companies. From content security against pirates, to regulatory updates and fighting subscriber churn, visit our website for more articles and videos. If you'd like to contribute, reach out to [charmaine@avia.org](mailto:charmaine@avia.org)

And with the return to live in-person events, we have now amassed a huge library of great photos from our recent events across Asia. Visit our [Media Gallery](#) for a look at who's been with us in Korea, Philippines, Indonesia and Singapore!

We are always striving to make our website better so please share your views and feedback with us. For all AVIA members, do register for an account to access all of our insights and reports, and for non-members, sign up to be on our mailing list for the latest updates and industry news.

## Member Reports:

The following reports are now available at [avia.org](http://avia.org) for download and are accessible to all. Please register at our website for access.



## New Members:

AVIA is only as strong as its members. We want to appeal to all parts of the video ecosystem and we are delighted that in the last quarter we have been joined by the following companies:

**PLUSMEDIA**  
NETWORKS ASIA

## 2023 Upcoming Events:

<b>OTT Summit</b>	<b>29-30 March</b>
<b>Future Of Video India</b>	<b>13 April</b>
<b>Taiwan In View</b>	<b>4 May</b>
<b>Satellite Industry Forum</b>	<b>6 June</b>

*Save the date*

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We want to hear from you. Please get in touch and let us know what you think:

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