THE ASIA
VIDEO INDUSTRY REPORT

2024

avia
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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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.

![avia - ASIA VIDEO INDUSTRY ASSOCIATION]

A TIME OF CHANGE

Welcome to the Asia Video Industry Report 2024. This is always a diverse and interesting read, made up of our thoughts on what is going on in the realms of government and regulation, as well as reflecting the current state of the fight against piracy. But most importantly, it is a snapshot of the industry at large, with contributions from a wide array of our members. It is fascinating to see the richness and diversity from core industry issues such as the state of regulation around the region and the situation with content piracy, to research, technology, content trends and advertising.

2023 has been a challenging year as we have seen a real focus on cost controls and rationalization. But ultimately this is a good thing because the primary purpose is to see profitability in the streaming industry. Wall Street has gone from irrational exuberance to irrational pessimism but the reality from a consumer's point of view is that the content options, and the offerings within, are only getting stronger and stronger. There is no doubt that streaming continues to have a very bright future and profitability is very close.

We always like to make a comparison between streaming and linear television. Personally, I don't think this is necessary. Both are services that deliver great content to consumers. The technology is simply different. Linear television continues to be an incredibly important medium across

Asia and those who write it off do so at their peril. We continue to see growth and innovation across many different metrics.

I couldn't begin to summarise all the contributions to this report, but I would like to focus on three topics – Gender Diversity, Advertising and AI.

AVIA has a responsibility to push for greater gender representation. Our proactive approach over the last 6 years has led to dedicated gender equality events, insightful webinars, and thought-provoking discussions including new voices at numerous conferences. However, while we have seen the rise of many impressive female leaders, it has not been enough. And all too often the upper echelons of many companies are disproportionately populated by men. This is often manifested when we host our conferences. So while at the time of writing it is yet to happen, I am very excited by the prospect of the Women First OTT Summit, and I am hopeful it will create an impact that leads to not just awareness, but over time, change.

Advertising is an area that has been a real focus over the last few years. As we have seen the growth of social media and UGC video platforms, there has been a huge growth in advertising on those platforms. That is normal and fully to be expected, but we do believe that the engagement that consumers feel in long form content is

different and more valuable to advertisers. Presently it appears that streaming services that are at least in part supported by advertising, are under-indexing and we believe it presents an untapped opportunity to advertisers. Over the last year with the support of our members, we have conducted research in Singapore, Indonesia and Thailand, that verifies this hypothesis. I would encourage everybody to look at the data that we present in this report.

Finally, we are at an inflection point in the development of this and almost every other industry. The development of large language model AI services is going to transform our industry. The script writers and actors' strikes in the US may have been settled, but there is no doubt that their agreements will not prevent radical change. I could not begin to spell out all the ways, even if I knew. But when Elon Musk says we are creating a world where no one will need a job, even if you discount that assertion by 99%, the change will be enormous. The Asia Video Summit 2023 was our first conference where we really looked at this issue in detail and you can be sure that you will hear much much more on this topic at our events in 2024.

We look forward to 2024. Challenges will remain but we are optimistic that growth will continue, and we hope this industry report gives everyone insight that will help them take their businesses forward. ∎

Louis Boswell
Chief Executive Officer, AVIA

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POLICY IN ASIA

Looking back over the past 12 months, I am struck by the pace and breadth of change we have seen on the policy front with regulators intensifying their focus on policy issues, most notably in the online space. Within AVIA, we've also seen our fair share of changes. I have stepped into the role of Chief Policy Officer, and we've recruited a new Director, Policy & Research, Shahira Caffoor. And on a global scale, the end of Covid restrictions has meant travel has started to return to pre-2020 levels. AVIA has embraced all of these changes.

Our three "In View" events (in Taipei, Jakarta and Bangkok), all thankfully back to being in person, have enabled us to re-engage with policy makers as well as members, giving us far better insights into specific market issues. Face to face meetings, hearing directly from regulators, both in public, but often more importantly, in private, gives us an invaluable opportunity to better understand the rationale behind some of the policy discussions as well as to reiterate our views on specific policies.

Nowhere has this been more important than in the arena of policy related to online content. This remains a key focus area for regulators trying to get to grips with how to regulate the whole "OTT" space; whilst our key messages remain that of distinction and self-regulation. All our meetings, presentations and submissions reinforce this position. Ensuring that regulators understand that the broad term OTT covers such a wide diaspora of content, from curated, to user-generated, to pirated content. Let alone the concept of OTT communication apps, such as WhatsApp, Line, WeChat etc. So it's vital to ensure that the correct terminology is being deployed, especially when looking at this from a regulatory perspective, to ensure that there aren't unintended consequences. AVIA remains focused on the Online Curated Content (OCC) space, advocating arguments that distinguish our industry as a niche within the online content sphere, with well-developed tools for age-gating, content descriptors and all the IP rights for the content – including locally-produced content, in many markets. Key to this is the concept that self-regulation is essential to support the growth of this part of the industry.

INDIA

India remains one of our more active markets with both the Telecoms Regulatory Authority of India (TRAI) and the Ministry of Information and Broadcasting (MIB) undertaking several consultations in the past 12 months. However, one of the more challenging pieces of regulation in India came from the Ministry of Family Health and Welfare (MoFHW) when they unexpectedly announced in May that they were extending regulations regarding on-screen tobacco advisories onto online platforms, with no prior consultation and a short implementation deadline. The regulations, already in place in cinemas and on TVs, state that all OCC services must carry tobacco advisories in three forms: a display of anti-tobacco health spots, for a minimum thirty seconds' duration each at the beginning and middle of the programme; a display of an anti-tobacco health warning as a prominent static message at the bottom of the screen during the period of display of the tobacco products or their use in the programme; and a display of an audio-visual disclaimer on the ill-effects of tobacco use, of minimum twenty seconds duration each, in the beginning and middle of the programme.[1] Whilst these advisories are important, the format and frequency clearly don't take into account the way in which online content is consumed, especially most frequently on mobile devices. Nor is it clear how retrospectively the guidelines should be applied; the vast quantity of content libraries for many of our members make this a herculean task if the guidelines should be implemented on their entire catalogue. The lack of prior consultation by the MoFHW, even with other government departments, and lack of understanding about the nature of the online content industry, is disappointing to say the least, making it much harder to reach any mutually acceptable outcome.

Also, in India there has been much discussion on Satellite Spectrum and a proposal by the government to auction this commodity rather than allocate it. By auctioning and granting exclusive rights to one user, all the current extensive frequency sharing and re-use would be gone and the spectrum resources available to India would be greatly reduced compared with today. Auctions would also be anti-competitive. They raise the prospect of a few wealthy players grabbing huge blocks of spectrum precisely to keep out competition, which would be disastrous in the media industry, where plurality of voices is the goal. Consumer welfare would also be greatly reduced. To date, no final decision has been made on this issue and AVIA, along with other concerned Associations, will continue to push back against this concept.

Finally in India, the current discussion revolves around the development of a new National Broadcasting Bill. This is very much in the early stages of discussion, with TRAI having just completed a pre-consultation on it, whilst MIB have just launched their own consultation.[2] AVIA is advocating for a holistic approach to the development of any new Bill, suggesting it should establish a framework and set objectives that any such Bill, and the regulators, should aim for, rather than produce an all-encompassing set of regulations. We look forward to continuing to engage with both TRAI and MIB on the discussion around shaping this new Bill throughout 2024.

MALAYSIA

Malaysia has not often been a market we've written about recently. Back in 2022, the Malaysian Communications and Multimedia Commission (MCMC) raised some unexpected concerns when they updated some of the content covered in their Content Code and in parallel,

1 https://ntcp.mohfw.gov.in/assets/document/Acts-Rules-Regulations/GSR-400(E).pdf
2 https://www.pib.gov.in/PressReleasePage.aspx?PRID=1976200

extended it to remove the legal exemption of online content from compliance with the Code. At that time, we engaged with the Content Forum, the local industry body, to raise our concerns with this approach. Since then, we have continued our dialogue with the Content Forum who, after the MCMC were faced with some strong opposition to the Content Code, were tasked with drawing up a new, self-regulation framework for online curated content. We suggested using AVIA's Self Governance Framework as the basis of any new Malaysian framework and have spent a large part of the last 12 months engaging with the Content Forum to help them develop Malaysia's new framework document. I'm delighted to announce that this has now been finalised and the new "Best Practice Note for Content on Online Curated Content Services" has been passed to MCMC to officially introduce, probably in early 2024. This will be a voluntary code which makes references to Malaysia's regulatory framework around content ratings, prohibited content, safety features and advertising. Taking AVIA's Self Governance Framework and Singapore's Content Code for Over-the-Top Video on Demand and Niche Services as their basis, the Content Forum have developed a document to help the content industry grow without the need for constraining regulation.

SELF-REGULATION

Other than Malaysia, we continue to hear a lot of discussion from regulators on their concerns and desire to try to regulate online content. Some of this is politically driven, either as a result of elections or in advance of them. Politicians become increasingly vocal as the issue of consumer protection climbs the political agenda. And there is often the desire for "legacy" regulations to be introduced prior to any political change. In Taiwan, discussions resumed on the OTT TV Act which has been periodically revisited over a number of years. In prior iterations, the NCC has attempted to introduce local content quotas and require the pre-registration of OCC platforms. Whilst we have yet to see the new draft, concerns remain that these themes will resurface once attention has turned back from the elections in January. Similarly in Indonesia, pre-elections, the political spotlight has again been shone on LGBTQ content under the guise of consumer protection. In turn, this has led to various agencies endeavouring to assert control over online content, despite there being no regulatory authority to do so. The Lembaga Sensor Film Republik Indonesia (LSF), who has regulatory authority for movies, including ratings, classification and censorship under the Film Law, recently engaged with online content platforms in an effort to insist that they fall under the regulatory ambit of the Film Law, despite it being generally understood that the LSF charter only covers film (theatrical) and television. Finally in Thailand, post-election, the discussion on regulating online content has re-emerged. However, as seen in other markets, there is no clear regulatory body currently with oversight of online content; the National Broadcasting and Telecommunications Commission Thailand (NBTC) has regulatory oversight over broadcasting, whilst the Electronic Transactions Development Agency (ETDA) has oversight on digital platforms conducting e-commerce. Some of the NBTC Commissioners remain focused on the need to introduce regulations on VOD, whilst others support the concept of self-regulation. At the same time, the recently elected government has announced it is setting up a new strategic committee to focus on developing soft power and expanding the Thai cultural market internationally, whilst also encouraging, for instance, foreign online content platforms to create content in Thailand. We will continue to engage the relevant regulatory bodies to monitor how these potentially different goals will be resolved.

NETWORK USAGE FEES

Other than the question of regulation, one of the key policy topics we've been especially active on this year has been that of net neutrality amid increasing pressure across Asia, but also in the European Union (EU) and the United Kingdom (UK), from the telecoms industry. We saw this in the EU context with a recent consultation on "The future of the electronic communications sector and its infrastructure" where the telecoms providers were lobbying for an introduction of mandated charging. In other words, a system of "network usage fees" should be implemented whereby content providers make payments to fund the activities of internet service providers/large telecom companies. Part of the argument being deployed by the telecoms industry was that this was already in place in South Korea after some high-level lobbying by the large telecoms providers. However, AVIA's submission noted that the introduction of this policy has not improved things from the point of view of the Korean consumers, who are seeing a reduction in transmission quality, but affected by the rising prices. Additionally, disagreements about the volume of traffic flows and the prices owed to them are now common and increasingly the subject of bureaucratic and legal disputes, tying up resources and negatively impacting Korea's reputation as an attractive market for business. Both the EU, and a separate OFCOM consultation on net neutrality concluded that net neutrality supports consumer choice and there was no need for mandated network fees to be introduced. However, this topic remains under discussion in other key markets, most notably India and Thailand, with similar lobbying from the telecoms industry. We will continue to actively engage on this topic to push against this approach.

CONCLUSION

It has been an incredibly busy year for the policy team, although that is a statement that seems to apply annually. But it is equally exciting as we watch the pace of change accelerate. 2024 looks to bring yet more challenges, but now that we have resumed travelling, I am confident that we'll continue to build and strengthen our relationships with stakeholders, ensuring AVIA remains well-placed in policy discussions throughout Asia. ∎

by Clare Bloomfield
Chief Policy Officer, AVIA

Baker McKenzie.

VIETNAM
ENFORCEMENT TRENDS REGARDING SUBSCRIPTION-VIDEO-ON-DEMAND SERVICES

The rising technology adoption in different social and economic activities presents opportunities and challenges for stakeholders, especially online service providers and regulators. In recent years, Vietnamese policymakers and enforcers have been initiating new policies and regulations to regulate new types of digital services, including the content industry, one of the most concerning areas not only in Vietnam but also globally.

Regarding **subscription-video-on-demand** (SVOD), last year, Vietnamese lawmakers passed a new regulation[1] that considers a SVOD service an internet-based pay television service. In particular, a SVOD service may include audio and/or visual programs provided by online service providers upon users'/subscribers' demand. In other words, SVOD services' content is curated by the service providers, not generated/created by online service users (e.g., users of social media network services).

This article will articulate the key regulators and enforcement trends concerning SVOD services in Vietnam.

1. CRITICAL REGULATORS AND RELEVANT OBLIGATIONS OF SVOD SERVICE PROVIDERS

In Vietnam, there are two significant authorities in charge of overseeing SVOD services, namely the Ministry of Culture, Sport, and Tourism (MOCST) and the Ministry of Information and Communications (MIC). The issuance of the new cinema laws[2] and Decree 71 amending Decree 06[3] in 2022 have separated the MOCST's and MIC's state management authorities in regulating SVOD services.

In particular, under cinema regulations, a SVOD service can be considered an online film dissemination service if a service provider offers films on its service. That said, if the SVOD service only provides films, it will fall under the exclusive purview of the cinema laws. To deliver a film to users/subscribers in Vietnam cross-border, the SVOD service provider must either obtain a film self-classification certification (SCC)[4] issued by the MOCST's cinema department or request that the MOCST classify the film.[5]

Nonetheless, if there is any non-film content (i.e., sports and other types of entertainment programs, such as reality shows or game shows, etc.,) on the SVOD service, the service provider will be considered a pay TV service provider subject to requirements for traditional broadcasting services. Specifically, under this circumstance, the SVOD service provider has to set up a local company in Vietnam and apply for a pay TV license granted by the MIC's Authority of Broadcasting and Electronic

Information (ABEI). However, for SVOD services containing both film and non-film content, should the service provider wish to self-classify the film, it is expected to obtain an SCC from the MOCST's cinema department besides the ABEI-issued pay TV license.

In a conference disseminating the Amended Decree 06, the MIC ABEI also verbally confirmed that an SVOD service only providing films is subject to the cinema laws without being obliged to attain the pay TV license under the Amended Decree 06.

As regards to content moderation, the newly adopted guiding instruments of the 2022 Cinema Law and the amended Decree 06 also reflect the authority separation as aforementioned. Particularly, film content must adhere to the cinema regulation on film classification/rating;[6] meanwhile, non-film content must follow the editing requirements under the broadcasting regulation.[7] Nonetheless, in practice, given that the definition of films under the new Cinema Law is relatively broad, deciding if a work is a film or non-film and applying a suitable legal framework is sometimes challenging for businesses when determining the applicable regulations and relevant competent authorities.

2. ENFORCEMENT TRENDS REGARDING SVOD SERVICES

Alongside the newly changed regulations, state authorities are also seeking to strengthen their enforcement of cinema and broadcasting legislation. This indicates that the government is determined to take rapid action toward online content providers, underscoring its commitment to ensuring compliance.

Upon issuing the new Cinema Law and its guiding decree,[8] the MOCST established the working group regulating film dissemination in cyberspace ("**Working Group**") to enforce the cinema laws by combatting illegal films on digital/online platforms. The Working Group's primary missions are to assess service providers' eligibility for self-classifying films disseminated in cyberspace, request online film disseminators to remove infringing films, and request telecommunications network providers to implement necessary technical measures to prevent access to infringing films, among other measures. The Working Group flags violating films before the MOCST's inspectorate takes on an enforcing role by imposing sanctions on the violator.

Recently, the MOCST has been incredibly proactive and relentless against online

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1 *Decree 71/2022/ND-CP amending several articles of Decree 06/2016/ND-CP on broadcasting services.*
2 *The new cinema laws mean the 2022 Cinema Law and its guiding regulations, such as Decree 131/2022 and Circular 05/2023/TT-BVHTTDL.*
3 *Decree 06/2016/ND-CP on broadcasting services amended by Decree 71/2022/ND-CP ("**Amended Decree 06**").*
4 *SCC is an umbrella certification based on which the service provider can self-classify various films served.*
5 *A film classification request will be assessed on a case-by-case basis for films for which a competent authority has not granted the relevant licenses.*
6 *The MOCST's Circular No. 05/2023/TT-BVHTTDL on film rating criteria and the display of film ratings and warnings.*
7 *The MIC's Circular No. 06/2023/TT-BTTTT on principles of editing, rating, and warning regarding sports and entertainment video/audio-on-demand content on broadcasting services.*
8 *Decree 131/2022/ND-CP guiding several articles of the Cinema Law.*

films with content negatively impacting Vietnam's sovereignty and image (e.g., content with a nine-dash line or defaming content). The MOCST has sanctioned several relevant cases in 2023.

As for the MIC, in the first half of 2023, the MIC ABEI organised various press conferences to report its enforcement results in the field of cross-border content businesses, such as SVOD, advertisements, games and social networks. Regarding SVOD services, the ABEI requested that significant TV manufacturers in Vietnam not (i) preinstall applications that violate Vietnamese laws and (ii) not set a quick-access button on TV remote controls to cross-border SVOD platforms that do not meet the licensing requirement.[9] The ABEI also concurrently sent a bundle of official letters urging offshore SVOD service providers to comply with the requirement of obtaining a pay TV license.

The MIC ABEI has been coordinating closely with the MOCST cinema department in monitoring SVOD services' compliance with the cinema laws and broadcasting regulations. Additionally, these competent state agencies are gradually making efforts (i.e., cooperating and learning from each other) to refine the mechanism to sanction cross-border services.

Regarding content violation on SVOD services, most of the violating content is found in films. There are no published cases relating to non-film content infringement on SVOD services.

3. NOTABLE SANCTIONS

Concerning SVOD-related violations, administrative sanctions are the most common enforcement measure. On the opposite page are several notable violations and corresponding sanctions at this juncture.

FINAL REMARKS

The competent authorities of Vietnam are transitioning toward a new policy regime as implicated by recent increased legislative and enforcement pressures against the online content industry, especially cross-border service providers. To avoid potential business disruptions, online service providers must assess the risks and ensure compliance with these changes. It's essential to stay up to date with any further developments in legislation and enforcement measures. ∎

by Tran Manh Hung
Principal

by Nguyen Tuan Linh
Government Affairs Manager

Violation	Maximum fine and sanctioning authorities	Potential additional sanctions/remedial measures	Legal basis
Cinema regulation (applicable to film content)			
Disseminating film in cyberspace without a film SCC	N/A	N/A	N/A
Failure to comply with cinema regulations regarding film content, film classification and film dissemination in cyberspace (categorised in groups)	Up to USD 4,200 approximately The MOCST Inspectorate	Forcible public announcements of the films that will no longer be disseminated Forcible removal of the relevant film Forcible suspension of the service in Vietnam from one to three months	Decree No. 38/2021/ND-CP, dated 29 March 2021, prescribing penalties for administrative violations involving cultural and advertising activities (partly amended by Decree 128/2022/ND-CP)
Broadcasting regulation (applicable to non-film content)			
Providing a SVOD service without a pay TV services license	Up to USD 8,500 approximately The MIC Inspectorate	Forcible return of illegal profits obtained from the violation	Decree No. 119/2020/ND-CP on penalties for administrative violations in the field of journalism and publishing (partly amended by Decree No. 14/2022/NĐ-CP)
Providing a program containing content that seriously affects national interests, sovereignty, and territorial integrity	Up to USD 21,000 approximately The MIC Inspectorate	Suspension of the license from six to twelve months Forcible removal of the violating content	As above

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INDIA
REGULATORY UPDATE

Over the last 18 months, there have been several regulatory developments which have impacted the entertainment, gaming, visual effects, and animation industries.

FILMED ENTERTAINMENT

The Cinematograph Act, 1952 was amended to include: (i) new age-rated categories for films, and additional requirements for the re-certification of films to be exhibited on television; and (ii) proscriptions on the unauthorised recording and exhibition of films to curb piracy.

Further, in July 2023, the Ministry of Information and Broadcasting (**MIB**) published draft Guidelines for exhibition of Public Services Announcement (**PSA**) films of the Central Government in Cinema Theatres, which inter-alia mandate the screening of PSA films, and prescribe specifications for the screening of PSA films. These have yet to be notified.

BROADCASTING

The MIB published the Guidelines for Uplinking and Downlinking of Television Channels in India, 2022 which, amongst others, (i) increased the net worth requirement for entities downlinking news channels from INR 50 million to INR 200 million for the first channel, and from INR 25 million to INR 50 million for each additional channel; and (ii) require permission holders to broadcast public service broadcasts on themes of social

relevance such as education, health and national integration. The MIB has since clarified that the erstwhile net worth requirements will continue to apply for persons who are only distributing and not originating or aggregating content.

In June 2022, the National Commission for Protection of Child Rights issued the draft Guidelines For Child And Adolescent Participation in the Entertainment Industry And Commercial Entertainment Activity to safeguard children engaged in content creation for television programs, reality shows, films, OTT platforms, etc. While the intention to protect minors is laudable, some proposals – such as obtaining prior permission from a district magistrate for a child under the age of 14 to participate in content – are impractical.

In November 2023, the MIB published the Broadcasting Services (Regulation) Bill, 2023 for stakeholder comments. The Bill aims to consolidate the legal framework for television and radio broadcasting and digital media content (including news content), and to: (i) require OTT broadcasters to register with the government; (ii) mandate 'Content Evaluation Committees'[1] for all broadcasters and networks; and (iii) impose large fines and up to 5 years' imprisonment for non-compliance.

INTERMEDIARIES

In 2023, the Information Technology (Intermediary Guidelines and Digital Media

Ethics Code) Rules, 2021 were amended to proscribe online gaming intermediaries from hosting, displaying, modifying, publishing, transmitting, storing, updating and, or, sharing any online real-money game which may cause harm to end users and has not been verified by a self-regulatory body, which is onerous for the relevant stakeholders.

In addition, the MIB now requires all publishers of online curated content to display age-based classification ratings in advertisements and other promotional material for their content. Further, the MIB has issued an advisory directing newspapers, private satellite television channels, and digital media publishers of news and current affairs to refrain from publishing advertisements for online betting platforms. Additionally, like cinemas, OTT platforms must now publish anti-tobacco health spots, health warnings and audio-visual disclaimers for content broadcast on their platforms.

ADVERTISING

Influencer marketing is now regulated through the: (i) Endorsements Know Hows! For Celebrities, Influencers and Virtual Influencers on Social Media Platforms which require influencers to, amongst others, disclose a material connection (such as compensation, awards and free

products) with an advertiser that may affect the credibility of their endorsement; and (ii) Additional Influencer Guidelines for Health and Wellness Celebrities, Influencers and Virtual Influencers which require that health and wellness celebrities ensure that the information they provide is accurate.
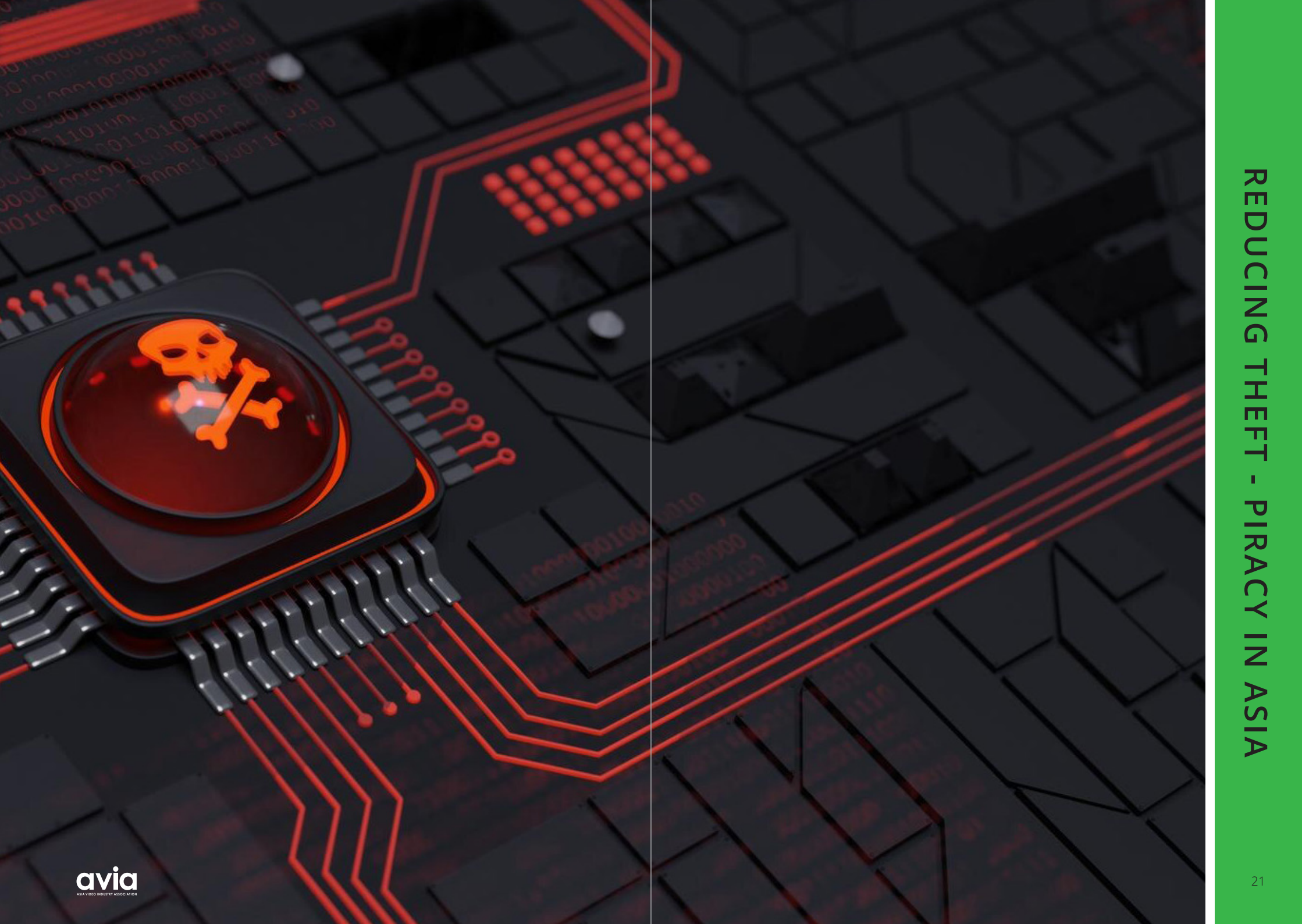
WHAT NEXT?

The changes to the regulatory framework are likely to increase the operations costs and stakeholders' compliance burdens in India. In particular, the proposed amendments to the regulations for the broadcast sector indicate that OTT platforms will be subject to greater obligations to ensure a level playing field for television, radio and digital media content. Further, once the provisions of the now published Digital Personal Data Protection Act, 2023 are notified, there will be additional compliance requirements including establishment of a grievance redressal mechanism and review of existing data processes. ∎

by Kaushik Moitra
Partner

BHARUCHA & PARTNERS was founded on immutable principles of professional ethics and excellence. The Firm has offices in 3 cities with 12 partners and over 80 lawyers who offer a mix of rich experience, creativity, and the energy of youth. B&P is a full-service law firm and advises clients on domestic and cross-border issues across sectors and geographies.

[1] *All broadcasters will need to establish a committee with members from various social groups including women, child welfare, scheduled castes, etc. as may be prescribed.*

CAP 2023
A YEAR OF PROGRESSION

In October 1990 the KLF (aka the Kopyright Liberation Front) released "What Time is Love?", the first of three singles known as the Stadium House Trilogy. The second, "3am Eternal" (KLF, A-Ha!), was released in January 1991, closely followed by "Last Train to Trancentral" in April. All three came from the KLF's seminal trance album, "The White Room", and all were huge hits, each hitting top ten internationally. In December the KLF released "Justified & Ancient" with Tammy Wynette, the First Lady of Country, on lead vocal. It was another international hit. In February the next year, they performed at the Brit Awards, concluding their performance by firing machine guns filled with blanks at the audience, and then the KLF ("the K, the L, the F and the 'ology") were gone. They never released any further music and deleted their entire back catalogue[1]. That's one way to prevent piracy.

CAP takes a much more proactive approach to protecting copyright of its member companies.

ENFORCEMENT & DISRUPTION

CAP's site blocking program remained front and centre to our enforcement efforts around the region in 2023. The year began with an expansion of our rolling site blocking program in Indonesia to include monthly referrals for blocking of pirate sites by both DNS blocking, and also IP for IP address only sites. By year's end,

CAP had seen more than 400 pirate sites blocked via conventional DNS blocking and a further 700 blocked via IP blocking. CAP's rolling site blocking program has to date been via Kominfo who block the pirate sites based not on the pirate content but other illegal content they carry, such as gambling or pornography. The majority of pirate sites in Indonesia carry such content, but to address pirate sites that do not, CAP met with Indonesia's Intellectual Property Office (DGIPR) in August, following which we are now referring pirate sites that are free of other illegal content to them for blocking.

CAP also increased the frequency of its site blocking program in Malaysia, with the goal of referring sites every four to six weeks. After overcoming some initial procedural issues with Malaysia's copyright enforcement body, the Ministry of Domestic Trade and Consumer Affairs (MDTCA), by year's end, CAP had referred close to 250 sites for blocking in Malaysia. Singapore is the other country where CAP has a regular site blocking program, although it is via judicial order and not regulatory. In early 2023, CAP obtained an order against more than 20 pirate sites and it is pursuing a further order that it hopes to file an application for before end 2023. CAP also utilised the ten-year anniversary of the introduction of Singapore's site blocking legislation to provide a submission to the Infocomm Media Development Authority (IMDA) on

our experiences in using the legislation, and how it could be improved. We are looking to pursue this submission with IMDA and the Ministry of Law in 2024.

In related site blocking efforts, CAP continued its program of referring sites that had been blocked in APAC to Meta for removal from their various platforms, and to date, this had seen almost half a million sites removed from Meta's platforms. As part of this program, CAP referred pirate sites in Vietnam that had not been blocked there to be blocked in Indonesia, following which they could be included in the referrals to Meta for removal, even though they had not been blocked in Vietnam. CAP also liaised with members and Hong Kong counsel to explore the possibility of obtaining a judicial order in that market.

In 2023 CAP increased its focus on investigations into pirate operators in the region. We undertook a number of investigations trying to identify pirate operators in Thailand but thus far without success. Our investigations into the pirate operation LokLok resulted in greater reward as we identified a number of operators in Indonesia. In addition to exploring enforcement actions against these individuals, we also ensured the site was blocked in Indonesia, referred the app to Google for removal from its Play Store, and liaised with iQiyi in China regarding potential actions there.

ENGAGEMENT & OUTREACH

A key component of CAP's enforcement program is our engagement and outreach with social media and messaging platforms to protect member company content. 2023 saw us strengthen our ties with the

two largest players, Google and Meta, via two separate Roundtables with each, along with their appearances at our Piracy Over the Top (POTT) Summit in December and bi-monthly CAP calls with APAC representatives for both Meta and Google. Piracy on Telegram remains a real concern for CAP and its members, and given the strong position taken by the Indonesian government against them in the past, we also worked to organise a meeting brokered by the Indonesian government with Telegram and attended by local industry and CAP representatives, to address widespread piracy of CAP member company content on their platform. We will be pursuing this effort throughout 2024.

In 2022, CAP worked with Globe and members of the Video Coalition of the Philippines (VCP) on a comprehensive push to introduce site blocking legislation in the Philippines. We undertook regular communications with Congressman Salceda and in May 2023, the Congressman successfully shepherded the model provisions CAP authored in tandem with the MPA through the Congress. In the same year, CAP's work with numerous Senators also saw two

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[1] *In 2020 they resurfaced, releasing their back catalogue on streaming platforms YouTube, and then donating their master tapes to the British Library in 2023*

mirror bills presented in the Senate in May and July. In addition to meeting with these Senators in person in July, we also met with the Intellectual Property Office of the Philippines (IPOPHL) to discuss the legislation and how it would be implemented and work in practice. We are hopeful that the legislation will come into play in 2024.

The importance of face-to-face meetings with governments cannot be understated and this year, CAP met with numerous government officials around the region to push for greater protection of member company content. Early in the year, we met with Kominfo to discuss our site blocking program and how it could be improved, and while the MOU we sought was unable to be reached, we maintained an excellent relationship with Kominfo, including having them appear on a panel at our State of Piracy Summit in Jakarta in August. CAP also met with MDTCA in Malaysia and communicated with them throughout the year as we increased our frequency of referrals for blocking. Throughout 2023 we continued our meetings with government officials in Taiwan, including the National Communications Commission (NCC) and the Ministry of Culture, urging them to implement effective and efficient site blocking procedures. Following the Presidential elections early in 2024, we hope to see some movement in this area. CAP also continued its regular engagement with the Korean Government via the

Korean Copyright Protection Agency (KCOPA), including having them speak on our anti-piracy panel at AVIA's Taiwan in View event in Taipei in May.

COLLABORATION

CAP's two annual anti-piracy Summits, the State of Piracy (SOP) and Piracy Over the Top (POTT), are central to our collaboration efforts in the region. These Summits are the only ones of their type in Asia Pacific and bring together industry and government representatives from around the region to discuss the various issues we all face in trying to best protect content. This year, CAP went on the road, hosting the SOP23 Summit in Jakarta, the first time it had been held outside of Hong Kong or Singapore. The Summit was very well attended, with the showpiece being the signing of an MOU with the recently formed local OTT association, AVISI, overseen by our key government

partner Kominfo. CAP will round out the year with its POTT Summit being hosted in Singapore.

We also kept up our work with local coalitions in the region. In Indonesia, in addition to working with AVISI, all site blocking referrals are made under the umbrella of the Video Coalition of Indonesia (VCI). In the Philippines, the CAP formed Video Coalition of Philippines (VCP) were central to our lobbying efforts to get strong site blocking measures in place, and VCP representatives accompanied CAP to all our meetings with Senators and IPOPHL. Our numerous visits to Taiwan in 2023 also saw regular engagement with the local coalitions, notably the Satellite Television Broadcasting Association (STBA), Cable Broadband Institute of Taiwan (CBIT) and the OTT Association. We will continue to work with these organisations in 2024 as we push for the implementation of stronger site blocking procedures. In addition to working with the Government organisation KCOPA, CAP also maintained its strong ties with Korea's Copyright Overseas Promotion Association (COA). COA represent the Korean broadcasters and their Executive Director, Mr Itae Choi, spoke at both SOP and POTT.

CAP member company engagement also continued as a key deliverable in 2023. In addition to our quarterly reports and meetings we also maintained contact via regular one-on-one meetings and calls. Towards the end of 2023, CAP

also released strategy documents that encapsulated both the 2023 achievements as well as objectives for 2024 on both a regional and market level.

RESEARCH & TECHNOLOGY

Protection of content must be underpinned by solid research - we need to know the source and nature of any piracy issues before we can identify how to best address the issues. To this end, CAP's Research and Technology pillar is key to our efforts. CAP undertakes annual YouGov consumer surveys in all our key markets in the region and are central to informing our various anti-piracy strategies for the region and for each market. The surveys provide us with a wealth of data that we use to not only amplify anti-piracy messages when the surveys are released at the start of each year, but to also supplement our various lobbying and communication efforts in markets throughout the year such as in submissions to government or through press releases.

The YouGov surveys consistently identify streaming piracy as a key concern in the region. To help address this concern, CAP's MagiCAP portal tracks legitimate and pirate streaming traffic in our key markets around the region. It also helps us identify which sites are to be prioritised for blocking in Singapore, Indonesia and Malaysia, and helps us track the decrease in traffic to those sites over time.
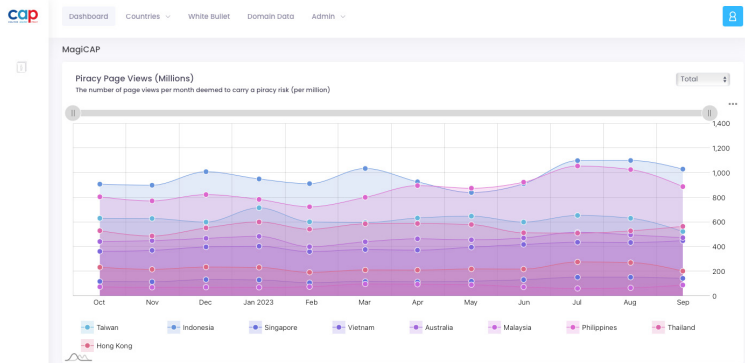
In 2023, we rebooted MagiCAP and, in addition to looking prettier, for the first time, MagiCAP now also includes ad revenue data provided by White Bullet. Through this data we will track the ad revenue on the top 300 pirate sites in the region, which will be invaluable data for us to leverage for discussion with governments and stakeholders in the region.

In addition to the Consumer Surveys and MagiCAP data, CAP aims to undertake two bespoke research projects every year to assist our antipiracy efforts in the region. Our first 2023 project was undertaken by Cyberstronomy and focussed on the potential harm and risks to consumers in the Philippines from accessing pirate content. We used this research extensively to support our lobbying of Senators and government for the passage of site blocking legislation in the Philippines. We are also undertaking research into the potential security concerns posed by ISDs being used to access pirate content

in Taiwan. We aim to have this research concluded in late 2023 or early 2024 following which it will be used to lobby government after the dust settles post the January 2024 Presidential election.

CONCLUSION

The KLF's step to lock away copyright content defeats the purpose and nature of the creation of content. However once content is created and distributed it must be protected. CAP has worked hard throughout 2023 to ensure its member company content is protected as best as it possibly can in Asia Pacific. We will build on the work undertaken to continue our push in 2024. KLF, A-Ha! ∎

by Matthew Cheetham
General Manager, Coalition Against Piracy

NAGRA
KUDELSKI

AI:
THE NEXT BIG M&E CREATIVE ADVENTURE OR A FAST-APPROACHING SECURITY HEADACHE?

The Media and Entertainment (M&E) industry has been using AI in various forms for several years. Recently though, its uses and applications have left the labs to become more mainstream. One area in particular, generative AI, has caused a tempest of debate across the industry and was one of the issues underpinning the recent writers' strike. Spearheaded by generative AI platforms such as ChatGPT and Midjourney, AI is being used to create content that is realistic and easily blended with live-captured video.

As an example, at a recent NAGRA customer event, strategic partner AWS demonstrated how the technology is being used across the M&E industry - from sports telematics to creating new inserts for content production. But aside from likeness protection, what about the wider security aspects and how could such technology be used for illicit gain?

PROTECTING CONTENT INVESTMENTS

In a world where computer generated moviemaking doesn't involve writers, crews, or talent, will today's structured production processes continue? Key to today's production process is the protection of IP against illicit distribution through solutions such as forensic watermarking and wider service protection approaches.

But how would this work in a pure generative AI landscape? In a pure AI landscape, where established processes, regulation and approaches are either in their infancy or non-existent, innovation can spawn both new content genres and new content production approaches – and arguably quicker than conventionally produced content.

GENERATIVE AI & PIRACY

Teams across the Kudelski Group have been hot-housing technologies that can identify illegal or unauthorised content generated through AI-generated platforms. However, a new era is dawning where piracy is about both stealing content and creating content that to the unaware, is a 'genuine fake'. As production timelines come under pressure, particularly at a time of industrial unrest, this can open the door to new generative AI content and/or content formats. Take for example the recent Netflix show[1] where contestants must guess whether their partners' actions are real or fake, based on both live and deepfake content they review in the 'chair of truth', or Marvel Studios' "*Secret Invasion*" TV series whose opening titles are created with AI.

Existing technologies can help address some of these challenges. Largely, the tools and techniques used to identify whether AI-generated work has infringed IP, are the same as those used to track conventional content piracy and include forensic watermarking to authenticate source material if required. In addition, investigative techniques are used to identify entities posting or selling illicit AI-generated content.

How significantly generative AI will change the M&E industry remains to be seen. If we look at the adoption of technology over the years, it requires new muscle memory – much like how we have learnt to deal with email and phone scams. However, as Bill Gates says in a recent blog[2], a deepfake video or voicemail of a family member allegedly kidnapped and demanding a ransom will have considerably more emotional impact than an email. Yet he and others adopt a positive yet cautious tone. As Paul Cramer from Veritone recently commented[3], "Gen AI won't replace humans, but it will replace the humans who are not using AI."

NAVIGATE THE DISRUPTION. SECURE YOUR FUTURE.

NAGRA has been securing content in all its forms for over 30 years. Our technologies extend across both content distribution and content production with solutions such as NAGRA NexGuard Forensic Watermarking[4], and NAGRA Active Streaming Protection[5]. As consumers start to interact and pay for a wider selection of content with their eyeballs (FAST, AdTech, loyalty rewards etc.) rather than their wallets, new security approaches beyond just content security are required. To secure your future or secure your vision of where AI can add value to your business, get in touch with one of our experts, we'd love to continue the conversation. ∎

by Tim Pearson
Vice President, Solution Marketing, NAGRA

1 https://www.whattowatch.com/features/deep-fake-love-cast-meet-the-contestants-of-the-netflix-reality-series
2 https://www.gatesnotes.com/The-risks-of-AI-are-real-but-manageable
3 https://www.tvtechnology.com/news/mande-faces-up-to-the-promise-and-challenges-of-generative-ai
4 https://dtv.nagra.com/nexguard-forensic-watermarking   5 https://dtv.nagra.com/active-streaming-protection

Authentix
ONLINE BRAND PROTECTION

DIGITAL AVATARS
AND THE PERILS OF IP INFRINGEMENT

One of the visible recent trends online has been the rise of realistic, AI-generated celebrity avatars. These may take myriad forms (from 3D animations to chatbots) and be generated using a variety of AI technologies (including publicly available apps like Silver Studio and Lensa). Many well-known figures have jumped on the bandwagon and commercialised their AI avatars through strategic partnerships with brands and social media platforms — from Snoop Dogg and Kendall Jenner (partnering with Meta) to Slovenian NBA star Luka Dončić (who has commissioned a digital doppelgänger that can interact with fans on TikTok). In South Korea, an entire K-Pop band, christened "Eternity", has been artificially created by a tech company, using deepfake and motion capture technology.

The emerging trend of digital avatars brings with it several potential IP risks. These risks include false endorsement (by using an avatar to promote an unlicensed product); reputational damage (by using deepfake technology to make a celebrity appear to say or do something unsavory); or straightforward copyright infringement (by copying videos and images, which could then be commercially exploited in various ways, from use in NFTs to social media pages). There exist judicial precedents on personality rights worldwide, including in cases preceding the internet, that can prevent such wrongful appropriation. For example,

in Midler v Ford Motor Co (1988), the singer Bette Midler sued Ford for using a "sound-alike" singer to imitate her voice in a series of commercials. The US Court of Appeals for the Ninth Circuit ruled in her favor, under a California tort statute that prohibited the use of a person's "name, voice, signature, photograph or likeness, in any manner." In Waits v. Frito Lay (1992), the court reaffirmed this decision, in a case where a commercial had imitated the voice of singer Tom Waits. In subsequent decades, courts in the United Kingdom expanded the tort of passing off in cases of false endorsement. For example, in Irvine v Talksport (2003), the Court of Appeal awarded damages to the racing driver Eddie Irvine, in a case where a photograph of Irvine speaking on a mobile phone had been doctored to show him listening to a portable radio, to which the logo of a radio station had been added. Similarly, in Fenty v Arcadia (2013), the court ruled in favor of the singer Rihanna, in a case where the retail chain Topshop had been selling t-shirts with her photograph, without authorization. Among recent cases, in April 2023, the Chinese Hangzhou Internet Court ruled that the image and related videos of "Ada", an AI character created by a Chinese tech company, enjoyed protection under Chinese copyright law. The court further ruled that the defendant had engaged in unfair competition by using Ada's images and videos to promote products on Douyin. In September 2023, the Delhi High Court, applying the doctrine

of passing off, passed a wide-ranging order prohibiting the sale of unlicensed merchandise using the image of the Bollywood actor Anil Kapoor, as well as the use of deepfake tools to create morphed images of Kapoor.

While the above precedents are undoubtedly helpful to protect digital avatars and personality rights globally, at least two significant challenges remain. First, detecting the misuse of avatars can be difficult in cases where such misuse is widespread (often because rights owners have allowed the problem to fester). Such cases may require trawling through hundreds of pages and sending an equivalent number of takedown requests. Second, stemming from the first, not all platforms may be receptive to cooperating with takedown requests. For example, relying solely on case law from foreign jurisdictions, in the absence of a domestic statute clearly recognizing personality rights, may not pass muster with certain platforms. Further, for platforms that insist on documentation, some IP offices may not issue certificates explicitly recognizing personality rights. It is also plausible that some misappropriated avatars may be deliberately cloaked with dissimilarities, and these may be cited by

platforms to resist takedowns. Platforms may also construe certain uses as falling within the realm of fair use, especially if such use is in contexts that are not outrightly commercial. The first problem, involving the scale of detection, can be suitably addressed by using advanced IP surveillance software, supplemented by ample human resources. The second problem, however, is trickier. Addressing it effectively may involve access to executives within various platforms, among whom matters can be escalated. These executives, in turn, would have to be convinced through persuasion and robust legal reasoning.

In the end, the misappropriation of avatars is still a relatively nascent problem, and the attitudes of platforms are yet to be discerned. Nevertheless, experience shows that the above problems are highly plausible, which should cause rights owners to be both vigilant and realistic on matters of enforcement. ∎

by Bharat Kapoor
Vice President, Online Brand Protection, Authentix

AUTHENTIX ONLINE BRAND PROTECTION *advises over 200 of the world's leading brands on intellectual property-related challenges in the digital world. These include monitoring for counterfeit products on online marketplaces, social media platforms, NFT portals and the darknet; follow-up investigations and enforcement; anti-piracy services; and litigation support. We use cutting-edge machine learning and image recognition technologies, which are both effective and adaptable.*

Synamedia

USE OF AI BY HACKERS & PIRATES
WITHIN THE VIDEO INDUSTRY

The emergence of AI is transforming the way we try to solve technological challenges. AI enables more intuitive and contextually aware conversations, which enhance user experience across various applications and industries. Pirate discourse indicates AI is already being harnessed by hackers and pirates to elevate the sophistication, reach, automation, and agility of their attacks and unauthorised video distribution, albeit with limited success so far. Knowledge in this field will allow the video industry to anticipate potential threats, to proactively address vulnerabilities and to prevent criminal activities.

AI is already being used by bad actors in a variety of high impact industries, including energy, healthcare, education, military, and defense, where it facilitates more complex, scalable, automated, and unpredictable attacks.

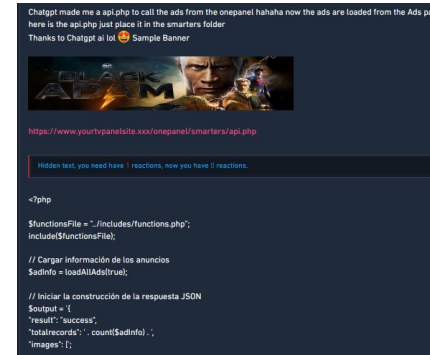The use of AI models in video piracy is relatively new and evidence of its application is still limited. This article presents some examples of its current use by video hackers and pirates, including in APAC, and looks at some potential future applications.

CODE AND SCRIPT WRITING ASSISTANCE

The emergence of ChatGPT and other generative AI solutions has the potential to lower the entry barrier for engaging in piracy. Previously, a certain level of technical proficiency, particularly in coding, was required to participate in these illicit activities. We can already see ChatGPT successfully helping with small coding tasks, while still struggling with more complicated requests. For example, ChatGPT was used by one piracy-forum member for creating a script that would automatically update an M3U file with the remote DNS service for IPTV Smarters, a video streaming player app often used by pirate services.

In another example, ChatGPT was successfully used as a tool for creating a

PHP script that acts as an API to provide a list of advertisement data in JSON format. The advertisement data is fetched from the Onepanel system, and the API is meant to be placed in the Smarters directory.
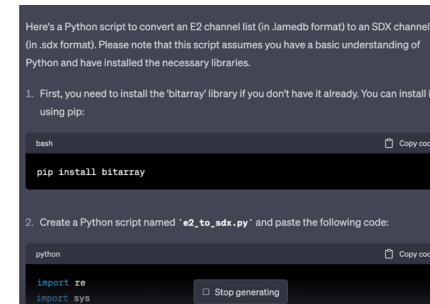
In a discussion about converting Enigma 2 (E2)[1] channel lists, a participant in a pirate chat forum recommended ChatGPT and shared a screenshot of the AI's output, and later the code itself, a Python script for the E2 to SDX channel list conversion. Pirates who use tools like ChatGPT do so to expedite their coding and make it more efficient. It is expected that further advancements will help bring AI's coding capabilities to a higher level of maturity and contribute to an increase in piracy-related activities.

FORUM MODERATION AND PROBLEM RESOLUTION

AI also has the potential to assist pirates with administrative tasks such as discussion-forum moderation. A German pirate forum recently introduced a new forum moderator, which according to them, is completely AI-based.

The big advantage of using AI as a moderator is that it learns from the answers of the forum members and from knowledge online, so that every question can get an immediate and precise response and in virtually any language. The bot moderator will also eventually reduce the dependency on human experts.
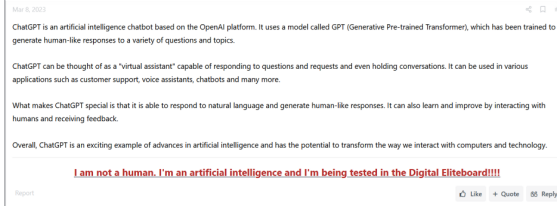
USE OF AI BY IPTV DEALERS TO PROMOTE THEIR SERVICE

A Pakistani dealer offers a reseller panel for simple users who want to set-up their IPTV business without spending on any infrastructure cost. He claims to make use of a template using ChatGPT that delivers multiple IPTV advertisements by different users to ensure that his IPTV is always listed on the top of google search results.

Synamedia

FUTURE APPLICATION OF AI IN VIDEO PIRACY

Generating AES keys

A forum user speculated that ChatGPT might be capable of generating AES keys for smart cards. In response, another user said it might be able to do so if given precise instructions.

DVB-T2 HD said:

Then it might not be long before ChatGPT generates the appropriate AES key for a Sky smart card. 😉 🙂

If you tell ChatGPT exactly what to do and calculate the AES key...
Nothing else was done in the video 😉

Overcoming DRM and Anti-Tamper systems

Users in a subreddit discuss Denuvo's Anti-Tamper system, which prevents the cracking of videogames. In this context, the users discuss whether AI can be trained to crack these dynamic systems.

r/Piracy · Posted by u/nucleargetawaycar   14 hours ago

Could AI be trained to crack DRM like Denuvo? I imagine that computers cracking games would be much more efficient in the long run (and there would likely be less anger and swearing in the NFOs). What are your thoughts on this?

Question

AI adoption in the video hacking community is still in its early stages, but we have already seen how it is lowering the technical barriers to entry for illegal activities. Pirates, for example, are using AI to assist with coding, address technical issues, and even manage forums. While the use of AI for more complex tasks is still limited, its use for simple tasks has been mostly effective.

The pirate community is hopeful that AI tools will eventually aid them in tackling more complex challenges, such as cracking AES encryption for smart cards or overcoming Denuvo Gaming protection. At present, these goals are more theoretical than practical, with the full potential of AI in these areas yet to be demonstrated. ∎

by Ted Rose
Director of Intelligence, Synamedia

Synamedia *protects approximately $50 billion in operator revenues every year with its unrivalled intellience-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 in the market, while its operational security team has brought many criminals to the attention of law enforcement officials.*
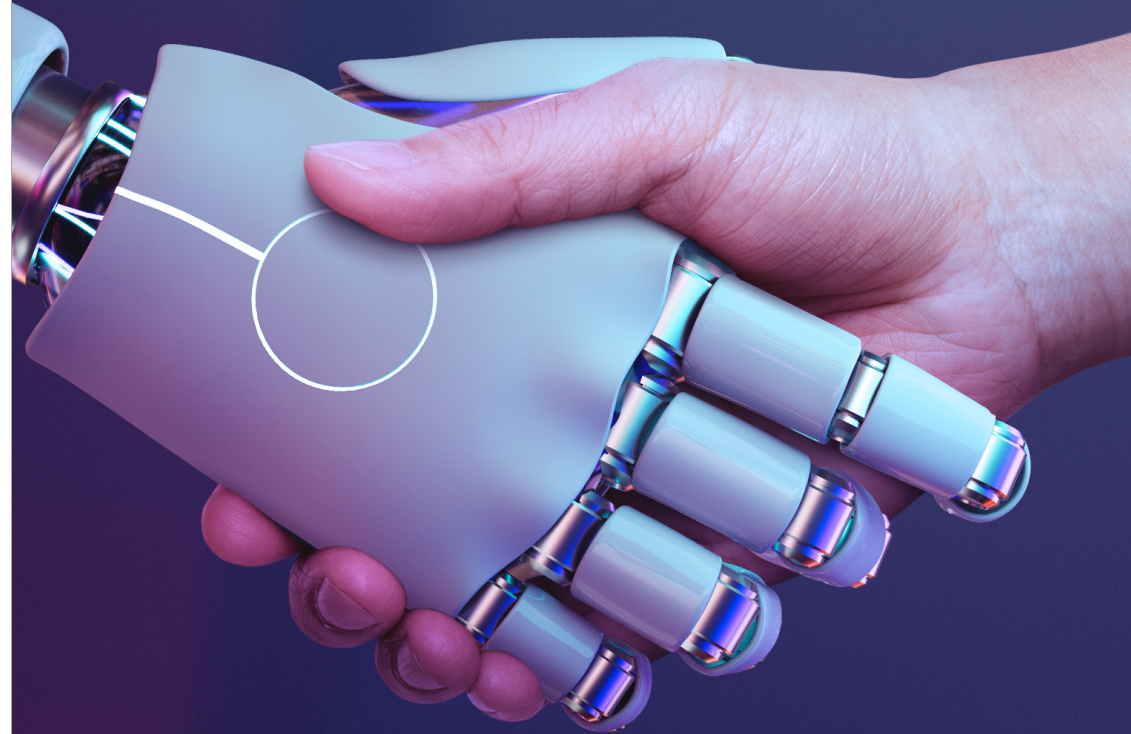
GLOBE GROUP
LEADING THE QUIET BATTLE AGAINST CONTENT PIRACY IN THE PHILIPPINES

The Philippines is home to the most voracious Internet users in the Asia Pacific[1], spending more than nine hours daily online amid accelerated digital adoption. Given such wide use of the web, cybercriminals are increasingly targeting the country, giving it the unfortunate renown as the second nation in the world most attacked by cyber threats in 2022.[2]

But with the rapid evolution of technology, the law has been left behind. As technology constantly evolves and changes the way people live, legislation has been static. One of these is the Philippines' antiquated Intellectual Property Code, a law crafted 26 years ago, when the Internet was still in its nascency in the country.

In its purpose-led transformation into a digital solutions platform, the Globe Group has taken on the crusade to reform the Intellectual Property landscape in the Philippines, now urgent as more Filipinos spend longer hours online for learning, earning and leisure.

With wider internet access and use, Filipinos become more vulnerable to lurking dangers, particularly pirate video sites that dupe users into sharing sensitive information through seemingly harmless links. Meanwhile, the law has yet to catch up. It was an opportunity that Globe took to elevate its anti-piracy campaign #PlayItRight, first launched in 2017 to protect customers from risks they are exposed to online.

Today, Globe stands as the only telco and digital solutions provider proactively pushing for amendments to the Intellectual Property Code, taking to the halls of the Philippine Congress in a bid to modernise the law.
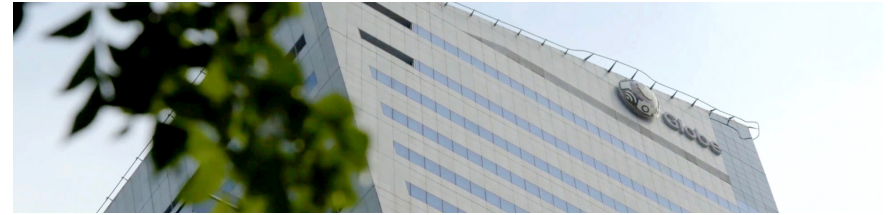
It's a quiet battle: no rallies on the streets, no social media noise. But this muted fight rages in the dark corners of the internet, with perpetrators lurking in the virtual underground.

Globe goes to great lengths to protect its customers from online crimes and to shield the creative industries that suffer due to illicit activities. That's why other than using technology to beat piracy, Globe is also pounding the pavement to see reform through legislation.

The journey has been arduous, with several versions of the bill pending for years, sidelined by other proposals considered urgent. But in May this year, the bill, championed by Albay 2nd District Rep. Joey Salceda, hurdled the House of Representatives.

Globe is working hand in hand with the Asia Video Industry Association and other partners to see through the passage of the law in the Senate and finally bring the IP code to the Internet Age.

Proposed IP Code amendments aim to introduce stronger provisions such as site-blocking, which Salceda hopes would stem the transmission of usually viral pirated content, as this would effectively shut down the platform for illegal content sharing.

Through a more robust IP Code, the Philippines will be able to better uphold the integrity of original content and protect the earning potential of creative workers, providing them an incentive to carry on with their craft. Better IP protection will ultimately redound to economic gains, as the creative industries are an important contributor to the economy: 7.3 percent of the country's GDP in 2022[3].

There has been a downtrend in recent years, with content piracy dampening the sector's growth in the Philippines. This is why amending the law is critical.

At a time when the creative industries are bouncing back, with cinemas open again and streaming sites more vibrant than ever, it is urgent to have the Intellectual Property Code amended so our law enforcers could resolutely strike against pirate sites and prevent them from making victims out of our customers and creative workers. Globe will be there through this fight, and we will push for its passage despite the many challenges.

In the halls of Congress and the depths of the Internet, Globe, the purveyor of the digital lifestyle for Filipinos, will remain steadfast in its efforts to beat intellectual property thieves, ready to take down pirates one site at a time. ∎

by Yoly C. Crisanto
Chief Sustainability and Corporate Communications Officer
Globe Group

GLOBE is a leading telecommunications and technology company in the Philippines that offers a suite of products and services to customers in the areas of connectivity, fintech, healthtech, edutech, climate tech, adtech, managed services and entertainment. It is a signatory to the UN Global Compact, committing to implement universal sustainability principles. Its principals are Ayala Corporation and Singtel, acknowledged industry leaders in the country and in the region.

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[1] Statista. (2023). *Average daily time spent using the internet in the Asia Pacific region in the 3rd quarter of 2022, by country or territory.* https://www.statista.com/statistics/1115663/apac-daily-time-spent-using-internet-by-country-or-region/
[2] Philippine Star. (March 15, 2023). *'Philippines 2nd most attacked by web threats worldwide last year.'* https://www.philstar.com/headlines/2023/03/15/2251710/philippines-2nd-most-attacked-web-threats-worldwide-last-year

[3] Philippine Statistics Authority. (March 23, 2023). *Country's Creative Economy Reached PhP 1.60 Trillion in 2022, with 7.3 Percent Contribution to the Gross Domestic Product.* https://psa.gov.ph/statistics/creative-economy

DATA VERIFICATION & PREDICTION
ELEVATE VIDEO SERVICE MONITORING, CONTENT PROTECTION, AND FAST CHANNEL DELIVERY

Pay TV operators and content providers are increasingly using data analytics throughout the media chain to optimise video service monitoring, enrich their FAST offerings, and secure their content. There's also a growing preference for semi-supervised systems that can act autonomously. The reason is simple: with data verification and prediction solutions, operators and content providers can gain actionable insights to increase their efficiency, secure content, and improve their profitability.

THE ROLE OF DATA IN ENHANCING VIDEO MONITORING

Data verification and prediction play a crucial role in video monitoring, providing pay TV operators with real-time insights into the health of their service and enabling them to identify trends, potential monetization opportunities, and piracy concerns. With a data-driven monitoring approach, operators can proactively address issues, optimise resources, and enhance viewer experiences, ensuring content delivery is consistent and of high quality. Ultimately, utilizing data analytics for video monitoring enables operators and service providers to quickly and preemptively pinpoint problems, ensuring premium, uninterrupted viewing experiences for viewers.

BATTLING VIDEO PIRACY WITH DATA

When it comes to stopping video piracy, monitoring and detection are key. However, detecting video piracy is challenging. With advanced data verification and prediction, content providers can efficiently detect new forms of piracy and spot anomalies. And once data is trained, algorithms can accurately detect and stop ongoing and known piracy trajectories. However, to successfully prevent video piracy, operators must adopt a proactive approach to content protection.

Data verification and prediction can also be used to identify potential unusual behavior, such as password sharing and illegal redistribution of video content. This enables operators and content providers to act proactively, instead of reactively, which is far more effective, especially for live video assets. Through data-driven verification and prediction, operators can quickly shut down illegal streaming sessions and protect their valuable revenue streams.

Here's an example: CDN leeching is one of the newest forms of piracy plaguing the video industry. CDN leeching, also called vampire services, enables pirates to use an operator's streaming infrastructure to serve their own customers, making the

illegal offering almost indistinguishable from the authentic service. However, it is not impossible to detect CDN leeching through data verification and prediction. Leveraging AI and machine learning, content providers can correlate data between the CDN structure, the service delivery platform, and the DRM licenses. The goal is to match the number of CDN sessions with the number of legitimate subscribers that launched a session. Using analytics, content providers can easily detect unusual patterns of behavior, such as more bandwidth being used than number of licenses, and carry out further investigation as necessary.

LEVERAGING DATA TO PERSONALISE FAST CHANNELS

In addition to anti-piracy protection, data verification and prediction are also

beneficial for monetization purposes, including the delivery of free ad-supported streaming TV (FAST) channels. With FAST channel revenue predicted to reach $12 billion by 2027, it's impossible to ignore the popularity of this streaming model. However, the plethora of FAST channels that are now available also indicates that viewers have many different options to choose from. To successfully attract, engage, and retain viewers, content providers need to deliver a top-tier, user-centric TV experience with content recommendations that align with audience preferences.

By comprehensively examining data and better understanding patterns, content providers can personalise FAST channels. Identifying patterns offers dual benefits; pay TV operators can segment targeted advertising and suggest the best-fit FAST

channels, ensuring viewers are only shown the channels and ads that are most pertinent to them. The aim is to curate choices for viewers, making sure they don't feel overwhelmed by too many FAST channel options, which might otherwise result in decision paralysis.

Another practical application of using data verification and prediction for FAST channels is pinpointing users that are reluctant to make payments. Once those viewers have been identified, pay TV operators can subsequently direct them to a tailored FAST-based proposition, which doesn't require subscription fees.

DATA VERIFICATION AND PREDICTION ARE ESSENTIAL FOR PAY TV OPERATORS

Data verification and prediction aren't just tools. They're essential, offering invaluable insights into user behavior. When choosing a data verification and prediction solution, operators should prioritise a comprehensive data perspective that's versatile enough for monitoring, ensuring quality of service, tailoring marketing strategies, improving targeted advertising, and thwarting content piracy. Using data analytics throughout the media chain, operators can personalise content delivery, prevent unauthorised content distribution, and ultimately ensure the sustainability and profitability of pay TV offerings. ∎

by Dror Mangel
VP of Products, Viaccess-Orca

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

VIACCESS-ORCA (VO) *is a leading provider of data-driven, end-to-end solutions that empower TV operators and service providers to deliver, secure, and monetise viewing experiences on every screen. From enabling AI-powered personalised TV and targeted advertising to offering robust security and anti-piracy services, VO is continually evolving to meet changing viewer preferences and industry needs.*

white bullet

GAMBLING ADVERTISING
CONTINUES TO DOMINATE
IN SOUTHEAST ASIA

The latest data from anti-piracy technology company White Bullet shows that the gambling advertising sector continues to dominate on piracy websites in Southeast Asia

White Bullet's latest research shows that the gambling sector is the dominant industry placing advertising on piracy websites that illegally provide access to copyrighted content across Southeast Asia. The gambling sector contributed 94% of estimated ad impressions in the region between September 2022 and August 2023. Vietnam and Singapore lead with 99% of the estimated ad impressions placed by gambling companies. By contrast, the gambling sector has contributed a much lower 14% of estimated ad impressions in Europe.

HOW DOES WHITE BULLET TRACK ADVERTISING?

White Bullet uses its technology to detect and risk score piracy websites and apps and then continually tracks the most risky and popular websites and apps in the region to identify the advertisers supporting them. White Bullet uses its proprietary advertising algorithm to calculate the estimated ad impressions (or ad views) it derives from ads found on pirate websites and apps.

WHY IS THE GAMBLING ADVERTISING SECTOR SO DOMINANT IN SOUTHEAST ASIA AND NOT IN EUROPE?

The research shows that majority of the gambling advertising found on piracy websites in Southeast Asia is embedded. White Bullet defines embedded advertising as a static form of advertising that is hard coded into a webpage and will appear on the webpage until the code is removed or changed by the website administrator. These ads are usually not engaged with programmatic advertising[1] or changing ads traded on open market. Usually these are affiliate ads whereby websites earn a commission from gambling operators for traffic directed to them. This suggests that affiliates of the gambling brands are working directly with the piracy websites or that the piracy websites are direct affiliates of the brands, compared to Europe, where much more significant volume of gambling advertising appears to be traded programmatically.

Many of the gambling operators found placing adverts on piracy websites across the Southeast Asia region state on their
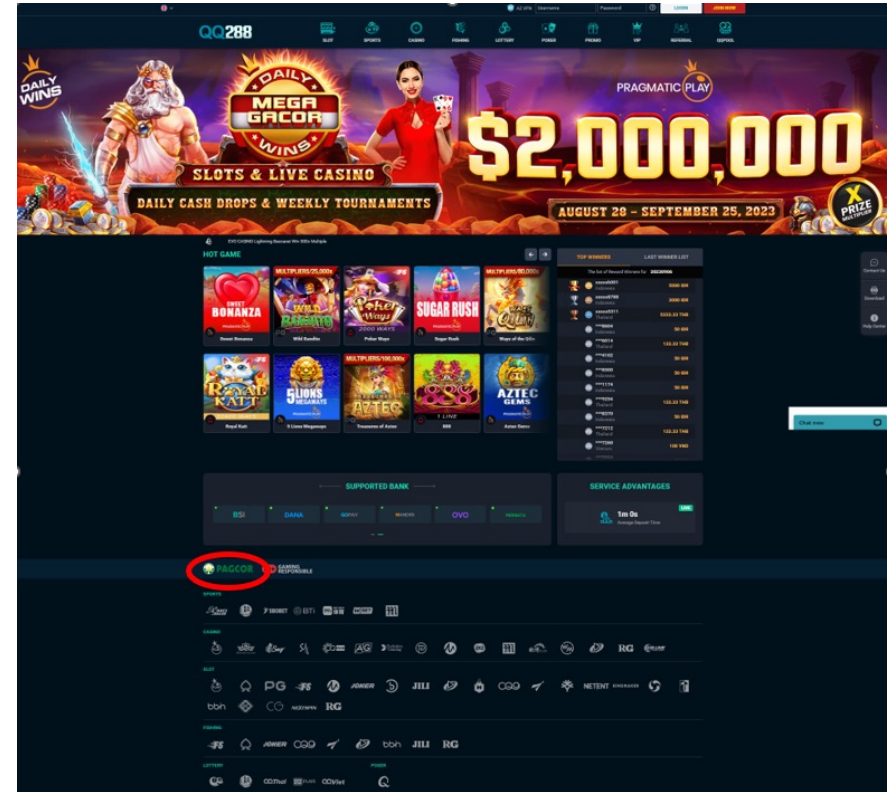

Image shows a landing page of an ad, found on piracy website, for a gambling operator, not listed on PAGCORs list of authorised service providers, displaying PAGCORs old logo.

own websites that they are licensed by the Philippine Amusement and Gaming Corporation (PAGCOR). Interestingly, these alleged Filipino licensed operators appear to be advertising on piracy websites outside of the Philippines. Therefore, a number of these operators are operating outside of the Philippines, which is prohibited by PAGCOR as Filipino licensed services should not be accessible in any way outside the Philippines or accept bets emanating outside the Philippines[2]. These operators are using an old logo of PAGCOR and upon further research are not listed on PAGCOR's list of authorised service providers[3], and may be fraudulently claiming PAGCOR licensing to gain recognition and legitimacy.

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[1] *Programmatic Advertising: Media or ad buying that uses technology to automate and optimise, in real time, the ad buying process. This ultimately serves targeted and relevant experiences to consumers across channels. On the back end, algorithms filter ad impressions derived from consumer behavioural data, which allows advertisers to define budget, goal, and attribution and optimise for reduced risk while increasing ROI.* *https://www.iab.com/wp-content/uploads/2016/04/Glossary-Formatted.pdf*

[2] *https://www.pagcor.ph/regulatory/pdf/GSRM/Gaming%20Site%20Templates/revised-regulatory-framework-for-the-remote-gaming-platform.pdf*
[3] *https://www.pagcor.ph/regulatory/pdf/App%20Kits/List-of-Service-Providers-and-Game-Offerings.pdf & https://www.pagcor.ph/regulatory/pdf/App%20Kits/List-of-authorized-online-remote-gaming-platforms.pdf*

Europe has seen success with regulatory bodies such as the UK Gambling Commission (UKGC) in a joint initiative with The City of London's Police Intellectual Property Crime Unit (PIPCU) and EU Gaming and Betting Association taking a tough stand against gambling ad funded piracy and revoking licenses for failing to adhere to regulations such as responsible placement of digital ads. White Bullet supports these programmes and also works with rights holders to send notices to gambling advertisers and other brands found supporting piracy websites. These outreach programmes made huge progress in reducing valuable ads on piracy websites – since 2019 premium brand ads fell from 11% to just 2% on piracy websites in the UK[4]. In Southeast Asia such coordinated efforts are yet to be developed.

WHAT CAN BE DONE IN SOUTHEAST ASIA TO LOWER THE NUMBER OF GAMBLING ADVERTISING?

Similar strategies to those implemented in Europe can be adopted in Southeast Asia to lower the number of gambling adverts on piracy websites.

Firstly, more regulation and enforcement including similar license conditions to the UKGC's responsible placement of digital advertisement, specifying piracy websites as one of the prohibited sets of publishers.

Secondly, a broader awareness programme similar to the ones established in Europe. Outreach programmes involving notices to brands raise awareness generally to the risks of piracy and can be both national and regional. Brands need to audit their affiliates and their ad supply chains but seldom get the levels of transparency data they need – of course it is not in the interest of the affiliates and the ad supply chain to point out to their clients (i.e., the brands they work with) when they have misplaced ads. So, getting data about misplacement means brands not only can act, blocking future ads, but may be able to demand money back for those ads already misplaced. ∎

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 and cyber risk data and protection, brand safety solutions, and full transparency on their advertising placement and digital supply chains. White Bullet also advises policymakers and government bodies on regulatory and compliance programmes globally.*

[4] Data from White Bullet programmes with various partners across 2019-2021

IPSOS AFFLUENT SURVEY | ASIA
AFFLUENT | PACIFIC
Media and Consumer Insights Survey
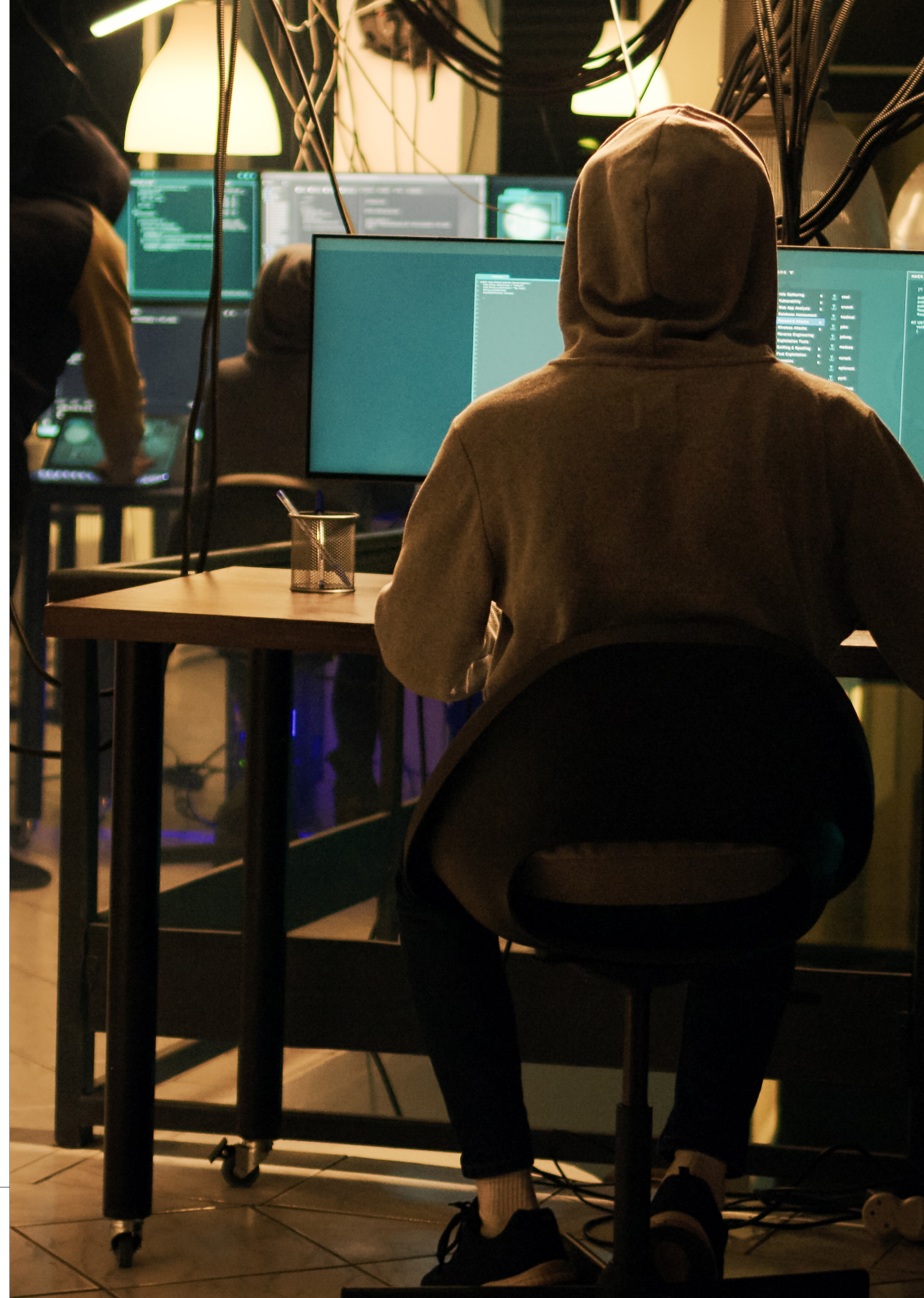
REGIONAL CHANNEL
TV VIEWERS

		VIEWED YESTERDAY	NOT VIEWED IN PAST MONTH
	INDIA	72%	17%
	PHILIPPINES	60%	24%
	INDONESIA	61%	28%
	MALAYSIA	49%	37%
	TAIWAN	47%	32%
	SINGAPORE	41%	42%
	THAILAND	42%	44%
	SOUTH KOREA	48%	26%
	CHINA	33%	45%
	AUSTRALIA	23%	50%
	HONG KONG	27%	53%

Source: Ipsos Affluent Asia Survey H1 2023
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

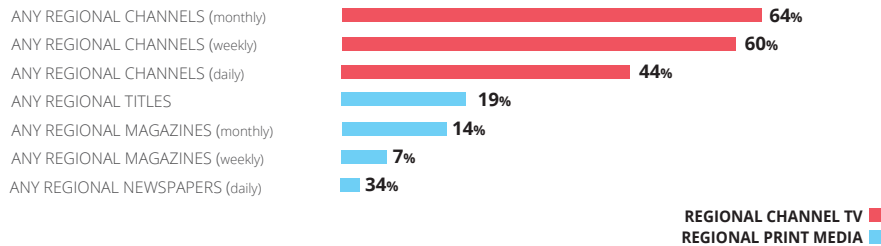|	
ANY REGIONAL CHANNELS (monthly)	64%
ANY REGIONAL CHANNELS (weekly)	60%
ANY REGIONAL CHANNELS (daily)	44%
ANY REGIONAL TITLES	19%
ANY REGIONAL MAGAZINES (monthly)	14%
ANY REGIONAL MAGAZINES (weekly)	7%
ANY REGIONAL NEWSPAPERS (daily)	34%

REGIONAL CHANNEL TV ■
REGIONAL PRINT MEDIA ■

Source: Ipsos Affluent Asia Survey H1 2023
Reported markets: Thailand, Hong Kong, Indonesia, Malaysia, The Philippines, Singapore, Taiwan, India, South Korea, Australia, China

AFFLUENT VIEWERS
ARE EARLY ADOPTERS...

OWNERSHIP INDEX

		WATCH		DON'T WATCH
		REGIONAL TV		
	CAMERA DRONES (FLYING CAMERAS)	**134**	>	63
	ELECTRONIC BEAUTY DEVICES (US$200+)	**129**	>	65
	VIRTUAL REALITY (VR) HEADSET	**144**	>	61
	VOICE COMMAND DEVICE / SMART SPEAKER (E.G. AMAZON ECHO, GOOGLE HOME, ETC.)	**121**	>	74
	WIRELESS BLUETOOTH HEADPHONES / SPEAKERS (US$200+)	**114**	>	84

Source: Ipsos Affluent Asia Survey H1 2023
Average Base Index: 100.
Reported markets: Thailand, Hong Kong, Indonesia, Malaysia, The Philippines, Singapore, Taiwan, India, South Korea, Australia, China
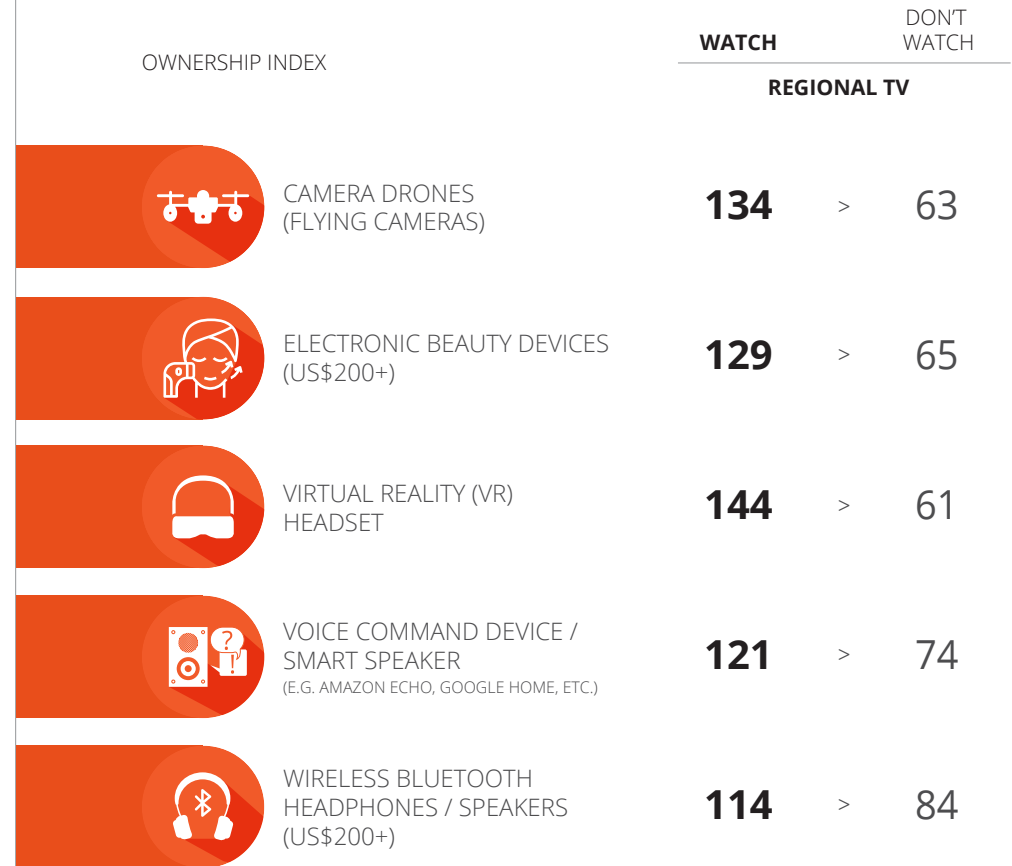*Viewed regional channel TV yesterday and Not viewed any regional channel TV in past month*

KEY DECISION MAKERS…

INDEX		WATCH		DON'T WATCH
			REGIONAL TV	
	INTEND TO BUY A CAR IN NEXT 12 MONTHS	**115**	>	84
	TOP MANAGEMENT	**141**	>	57
	OWN BONDS	**122**	>	75
	OWN COLLECTIBLES AS AN INVESTMENT (E.G. ART, ANTIQUES, GEMS, ETC.)	**127**	>	76
	OWN COMMODITY FUTURES / OPTIONS	**139**	>	59

LUXURY SPENDERS…

INDEX		WATCH		DON'T WATCH
			REGIONAL TV	
	OWN QUALITY / DESIGNER ACCESSORIES & FOOTWEAR WORTH US$10,000+	**139**	>	55
	OWN JEWELLERY WORTH US$10,000+	**134**	>	62
	OWN A LUXURY WATCH WORTH US$10,000+	**123**	>	75
	OWN QUALITY / DESIGNER CLOTHES & LEATHER GOODS WORTH US$10,000+	**132**	>	64
	CONSUMED BRANDY / COGNAC IN PAST 4 WEEKS	**128**	>	69

IPSOS AFFLUENT SURVEY | ASIA
AFFLUENT PACIFIC
Media and Consumer Insights Survey

THE AFFLUENCERS...

INDEX		WATCH		DON'T WATCH
		REGIONAL TV		
WORKED ON INTERNATIONAL BUSINESS STRATEGIES		**148**	>	56
LOBBIED OR ADVISED MEMBERS OF NATIONAL OR LOCAL GOVERNMENT		**137**	>	69
INVOLVED WITH ENVIRONMENTAL / CONSERVATION GROUP		**143**	>	58
RAISED CAPITAL, INVESTED FUNDS FOR MY COMPANY		**132**	>	63
TAKEN EXECUTIVE DECISIONS WHICH AFFECT ORGANISATION'S OPERATIONS IN OTHER COUNTRIES		**147**	>	59

AFFLUENT VIEWERS
STRONGLY AGREE THAT...

INDEX		WATCH		DON'T WATCH
		REGIONAL TV		
PEOPLE OFTEN ASK MY ADVICE ABOUT FASHION AND WHAT THEY SHOULD WEAR		**122**	>	87
I REGULARLY MAKE THE EFFORT TO INVESTIGATE A COMPANY'S ENVIRONMENTAL OR SOCIAL RECORD		**136**	>	68
PEOPLE OFTEN ASK MY ADVICE ABOUT FINANCIAL ISSUES AND INVESTING		**130**	>	74
I AM ALWAYS ONE OF THE FIRST TO HAVE TECHNOLOGICALLY INNOVATIVE PRODUCTS		**123**	>	80
I VALUE THE ELEMENTS OF HIGH QUALITY AND EXCLUSIVITY AS DEMONSTRATED BY LUXURY PRODUCTS		**128**	>	76

NETTING DEFINITION OF
REGIONAL TV CHANNELS

REGIONAL NEWS

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

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

REGIONAL SPORTS

Eurosport
Star Sports 2

__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.

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797.8

MILLION PAY TV SUBSCRIBERS

4.2

BILLION BROADBAND SUBSCRIBERS

IN ASIA PACIFIC

100%
CHINA
596.2 Million
2,161.7 Million

100%
SOUTH KOREA
36.3 Million
94.4 Million

24%
JAPAN
13.4 Million
245.5 Million

62%
HONG KONG
1.7 Million
25.7 Million

85%
TAIWAN
6.6 Million
37.2 Million

61%
INDIA
106.6 Million
882.7 Million

21%
THAILAND
4.6 Million
90.5 Million

71%
VIETNAM
13.8 Million
107.2 Million

35%
PHILIPPINES
8.6 Million
125.3 Million

42%
MALAYSIA
3.2 Million
44.8 Million

8%
INDONESIA
3.8 Million
306.2 Million

41%
SINGAPORE
0.6 Million
11.4 Million

19%
AUSTRALIA
1.8 Million
37.5 Million

29%
NEW ZEALAND
0.5 Million
8.8 Million

FAST FACTS*

POPULATION	3,684,200,000
TOTAL HOMES	1,091,700,000
TELEVISION HOMES	879,800,000
PAY TV PENETRATION *	69%
PAY TV SUBSCRIBERS	797,800,000
BROADBAND SUBSCRIBERS	4,179,000,000

* 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

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PAY TV'S PAINFUL TRANSITION

The pay TV universe is contracting in Asia Pacific, reaching 201 million homes ex-China in 2023, according to the latest estimates from Media Partners Asia (MPA). The focus in many markets is milking high ARPU, aging customer homes while in other territories, broadband bundles and linear plus VOD aggregation remain key. Advertising in most markets has been weak due to macro and structural dynamics with only India remaining robust and expected to grow in the future in terms of TV ad dollars.

Key market take-outs include:

AUSTRALIA

The Foxtel base continues to decline though churn has improved and ARPUs remain impressive. Content and technology costs are being managed aggressively as a result.

In October 2023, Foxtel announced plans to launch its aggregator platform branded Hubbl. Previously known as 'Project Magneto', Hubbl brings together paid and free streaming entertainment, giving consumers access to a universe of content, whilst unifying subscriptions.

CHINA

Low-cost IPTV services bundled with fixed broadband continues to drive pay TV industry growth. China Telecom, China Mobile and China Unicom are the key IPTV service providers, while national cable operator China Broadcast Network leads utility-driven cable TV.

Pay TV's expansion slowed with 17 mil. net new subscribers in 2023 (vs 26-36 mil. annual adds in 2020-22). IPTV continues to gain subs and revenue and will offset losses in cable-TV.

INDIA

Television remains the dominant segment in India, accounting for ~70% of the video industry revenue. Nevertheless, TV's growth is expected to remain subdued in the future largely because of a contraction in the pay TV universe. This revenue loss will be offset by modest growth in TV advertising.

Pay TV is estimated to lose 6.5 million subscribers in 2023. The pay TV subscriber base will contract over the next five years. This decline is primarily due to the proliferation of cheaper alternatives, such as Freedish and online User-Generated Content (UGC) platforms, as well as differentiated content offerings available on premium online video platforms.

INDONESIA

Pay TV, particularly low-cost DTH, has historically offered clear signal quality to FTA channels, an advantage now negated by the analogue switch-off that completed in Q1 2023. Growing broadband access and the relative affordability of SVOD has limited pay TV's growth.

Leading pay TV operators include IndiHome with 1.9 mil. IPTV subscribers and Link Media with 750,000 cable subscribers. Both leading operators had flat or declining subscriber growth in 2023.

KOREA

The large pay TV universe has started to contract more sharpy. Telcos continue to dominate video distribution but are starting to see IPTV growth flatten as TVOD has become disrupted by Netflix and demand for linear channel bundles fade. Cable TV and DTH cord cutting has accelerated while pay TV advertising is in the doldrums.

MALAYSIA

The legacy pay TV industry continues to lose subscribers, largely on Astro's legacy satellite platform. Bundled broadband and IPTV services from Telekom Malaysia (TM) and by Astro Broadband have helped partially offset DTH's decline.

PHILIPPINES

The traditional pay TV industry remains attractive, shored by DTH satellite, led by Cignal TV. Cable remains weak with the demise of Sky. PLDT owned Cignal continues to grow on the back of attractively priced channel packages with sports, US, local and Asian premium content. The company is also investing in an OTT app aggregation platform

TAIWAN

Cable TV, albeit contracting, is well penetrated at 58% of TV households. By end 2023, MPA estimates 4.6 mil. households will subscribe to cable TV services anchored to popular mass-market entertainment programming and 24-hour cable news channels. IPTV remains resilient with Chunghwa offering competitive quadruple bundles and will generate US$322 mil. in revenue. Overall pay TV revenue will remain flat at US$1.8 bil.

THAILAND

True Visions remains in slow decline due to the contraction in its legacy base while AIS Play, after its Jasmine acquisition, has decidedly become less aggressive in investing in pay channels. AIS has grown its installed base in recent years on the back of subsidised broadband bundles. ∎

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STREAMING'S NEXT LEVERS OF GROWTH

The online video sector will generate an estimated US$54 billion in revenue in 2023, according to Media Partners Asia. Five markets will contribute >90% in aggregate, led by China at over 50%, followed by Japan with ~20%; Australia, 10%; while Korea and India will contribute a combined 13%. Ex-China, the online video revenue pie will reach an estimated US$27 billion in 2023, with US$12 billion from UGC / social video (led by YouTube, Meta and others); US$12 billion from SVOD (led by Netflix with various global, local and regional players also in the mix); and US$3 billion from premium AVOD (driven by local players in Australia, India, Indonesia and Japan).

ONLINE VIDEO REVENUE BY KEY MARKETS (2023)

Total Revenue (US$ bil.)	5.4	27.2	3.8	1.3	10.3	3.1	0.3	0.5	0.4	0.9	0.9

Source: Media Partners Asia

UGC / Social AVOD · Premium AVOD · SVOD
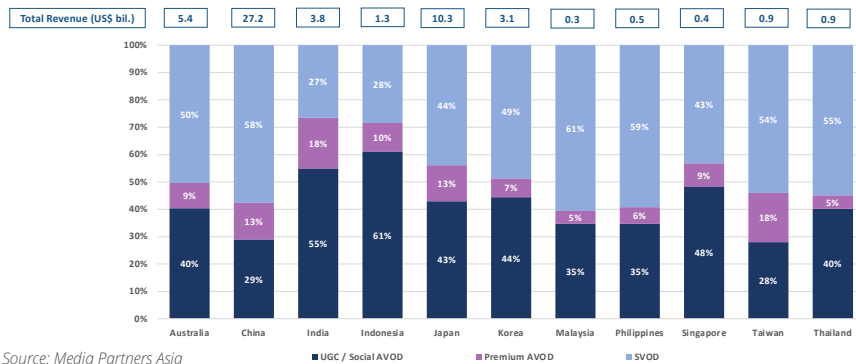
As much of TV continues to transition online, streaming platforms are increasingly focused on advertising, price increases, connected TV distribution and more impactful investment in content and curated experiences to drive monetization and profitability. As per AMPD Research, investment in premium Asian content, led by Korean, Japanese anime, Chinese and Indian movies and series and some shows from Indonesia and Thailand continues to have the most impact in terms of driving customer acquisition locally and engagement across the region in terms of travelability.

SHARE OF TOTAL ONLINE VIDEO VIEWERSHIP (JAN - SEPT. 2023)

UGC / Social / Short Video · Premium VOD
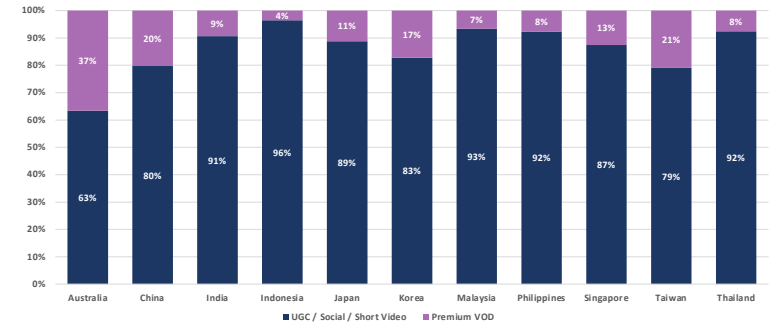
Note: Premium VOD solely comprises SVOD and freemium platforms
Source: AMPD

Key market take-outs include:

AUSTRALIA

TV has transitioned online, making Australia a US$5 bil. premium VOD market though with low growth prospects, especially in SVOD.

Cost of living increases and subscription fatigue has ensured that SVOD is now saturated at 80% penetration with an average of more than 3 subscriptions per household. SVOD churn has increased through 2022-23. 2024 promises to see flat to negative growth for the category with price increases partially offsetting the impact.

Much of online video's future growth will come through: (1) Advertising at domestic BVOD platforms and SVODs such as Netflix, Disney, Binge and others; (2) Customer growth at newer platforms such as Paramount+ and potential new entrants such as Max; and (3) Price increases across the board.

CHINA

UGC and social video advertising dominate engagement and revenue generation. Consumption on Tencent's WeChat Video Account has scaled rapidly, displacing Douyin and Kuaishou as the top UGC AVOD platform in terms of active usage and reach. While Tencent is ramping up ad monetization on Video Account, new ad inventory will put online video ad pricing under pressure.

After bottoming out in 2021-22, premium VOD consumption share is trending upward, along with rising MAUs on key premium platforms.

The online SVOD category will see revenues expand by 19% in 2023 as ARPU improves. iQIYI and Tencent Video continue to drive category expansion in 2023, contributing over 65% of new subs. The two platforms together lead the SVOD category in monetization. Key SVOD platforms are focused on innovating premium offerings with stronger content and sports properties to justify upward adjustments on pricing.

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A new online content licensing system was established by NRTA, with censorship mirroring the rigid review and approval process on theatrical films and TV content. Platforms are adapting to the new content regulations, with title approvals normalising in 2023.

INDIA

Led by YouTube and Meta, UGC and social video advertising captures 75% of the total online video advertising market in 2023. Premium AVOD platforms will generate ~US$0.7 bil. in revenues in 2023, with new market entrant Jio Cinema accounting for 50%. The increasing consumption of AVOD content on CTV platforms is enabling services to command superior CPMs and secure a slice of advertisers' TV budgets.

Investment in online cricket rights and local entertainment peaked over 2022-23 and will moderate going forward. The online SVOD category has experienced a substantial correction in subscribers though ARPU has improved.

Churn at Disney+ Hotstar has increased due to the loss of IPL digital rights to Jio along with the free streaming of Asia Cup and ICC World Cup. In 2023, popular SVOD platforms implemented price increases across various subscription plans. Notably, Prime Video raised prices for its quarterly and monthly plans and Zee5 increased annual plan prices.

INDONESIA

Online video revenues are expected to reach US$1.3 billion in 2023, up 10% Y/Y, with advertising contributing 72% and subscription 28%. Ad-driven tech giants YouTube, Meta and TikTok capture the bulk of the total online video revenue pie while premium VOD platforms led by Netflix, Vidio, Disney+ Hotstar, RCTI and Viu remain competitive.

Following a period of rapid growth over 2020-22, 2023 represented a clear shift in Indonesia's SVOD story as platforms prioritised monetization and churn reduction over pure subscriber growth. Disney+ Hotstar, Viu, Vidio and Netflix have all adjusted direct prices and cut back on low-cost mobile bundles and discounts.

Netflix is expected to scale up its investment in premium local content while Vidio's local content investments will reaccelerate in 2024 with a focus on SVOD growth and conversion. Viu's proposition will remain led by Korean content with local as a second pillar. New entrant Amazon Prime Video continues to invest in local content. Disney's content strategy is anchored to its global / US entertainment and Korean pillars.

JAPAN

The aggregate SVOD market universe scaled to ~50 mil. in 1H 2023. Net subscriber growth has reduced significantly as platforms consolidate and the industry matures. Local streamer U-Next completed its acquisition of Paravi at end-June 2023. Post-consolidation, U-Next overtook Disney+ and Hulu Japan to become Japan's third largest SVOD service after Amazon Prime Video and Netflix. In search of new growth, Disney+ and Hulu Japan have launched a bundled, discounted subscription in July 2023. Netflix has introduced anti-password sharing measures.

SVOD incumbents Amazon Prime Video and Netflix continue to lead the market and customer growth. Amazon's growth has been driven by sports, such as the World Baseball Classic, and anime, including exclusively licensed theatrical hit One Piece Film: Red. Netflix's original and licensed live-action content attracted new subscribers with titles such as First Love, Alice in Borderland and Love Village.

Local BVOD platform TVer is gaining ground, capturing 30% of premium VOD viewership in 1H 2023 as per AMPD Research. TVer aggregates much of Japan's FTA TV dramas, variety, news and sports on its ad-monetised platform. Television dramas and variety shows drive viewership. Fuji TV, TBS and Nippon TV titles cumulatively drove ~70% of viewership in 1H 2023.

Local non-anime is on the rise, driving 35% of premium VOD viewership in 1H 2023. Leading sources of licensed network dramas and variety include Fuji TV, NTV, TBS, TV Asahi and TV Tokyo, with significant viewership on TVer and Hulu Japan. Netflix's originals had a strong 1H 2023 as did Amazon.

KOREA

Netflix dominates the US$1.5 bil. SVOD category. Coupang Play, owned by domestic e-commerce giant Coupang, has emerged as the fastest growing domestic streamer in 2023. CJ's TVing remains competitive, raising prices in Q4 2023 withh plans to introduce ads in 2024.

Total investment in Korean online video content is expected to reach US$1.8 billion in 2023 – this number includes offshore platforms (i.e. Viu and others) acquiring content and having output deals in the market for global distribution.

According to AMPD, Korean online content demand is increasingly diverse with drama and romance, variety and reality, and crime and thriller genres streamed by >60% of premium VOD users in 1H 2023, while ~45% viewed comedy, sci-fi and fantasy titles.

The need to meaningfully differentiate local content offerings has given rise to impactful original reality (Physical: 100), documentary (In the Name of God: A Holy Betrayal), crime and thriller (The Glory, Big Bet) and comedy dramas (Work Later, Drink Now).

TAIWAN

The SVOD market continues to grow at a relatively robust rate, driven in particular by Disney+ and Netflix. An important telco integration, marketing investment and hit Korean superhero drama Moving has driven Disney's subscriber growth. Netflix's Korean drama, Japanese anime, Hollywood titles and a growing offering

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of Chinese dramas have helped power organic subscriber growth.

Other key players that gained subscribers in 2023 include Hami Video and MyVideo. Hami Video benefited from exclusive online broadcast of all matches from Hangzhou Asian Games. MyVideo has an exclusive and expanded partnership with BBC Player since August 2023.

THAILAND

Thailand is Southeast Asia's largest SVOD revenue market. Netflix leads, followed by telco-operated aggregators TrueID and AIS

Play, who tap into large broadband and pay TV bases to convert a substantial base of high-ARPU SVOD customers.

Chinese platforms WeTV and iQIYI as well as regional platform Viu also compete effectively with significant engagement and a loyal customer base.

Local content, Korean dramas, Japanese anime and US content continue to drive customer engagement and acquisition along with premium sports (i.e. Premier League football). ■

GWI.

CHANGES IN THE WORLD OF TELEVISION
HOW TV AND VIDEO HABITS ARE SHIFTING

Last year, many consumers had savings they'd racked up during lockdowns, and weren't yet actively cutting inessential purchases like in-home entertainment. Broadband speed and access were also improving in many APAC markets. Against this backdrop, time spent watching online video crept ahead of broadcast TV for the very first time in our data.

12 months on, the situation looks a little different. The number of APAC consumers saying they don't have any savings or investments has increased 15% year-on-year, and those who report paying for a movie or TV service has dropped slightly during this time. The end of China's 2022 lockdown also saw people here resume traveling and going to live events, causing time spent watching TV overall to drop.

We expect online TV to keep expanding in parts of the region as connectivity improves. For now, brands and TV providers should focus on the intricacies of the areas they operate in, each of which have their own unique TV landscape.

As we pointed out last year, India is an extremely attractive market for advertisers because many of its residents are going online for the first time and taking out subscriptions. Among the average Indian internet user, half of their overall TV time is now devoted to online video. And groups like luxury shoppers, car buyers, and fast food eaters spend significantly longer watching streaming services than the national average; so there are many opportunities for marketers to engage with specific audiences, especially with more ad-supported tiers coming in 2024.

Where streaming has had the biggest impact on TV habits

The % share of overall TV time devoted to online streaming, based on the average daily time consumers in each market say they spend watching online/broadcast TV

Market	%
China	53
India	50
Philippines	50
Vietnam	50
Thailand	49
Taiwan	48
Singapore	47
Malaysia	45
New Zealand	43
Hong Kong	42
Indonesia	40
Australia	38
South Korea	28
Japan	15

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

GWI Core Q2 2023   90,311 internet users in 14 APAC markets aged 16-64

GWI.

Alongside India, places like the Philippines and Taiwan have also seen big shifts in viewing habits over time, putting them on our radar. They're also among the markets where consumers are most likely to find out about new products via pre-roll ads. People are increasingly watching online TV campaigns, and it's paying off.

Naturally, broadcast TV still carries a lot of weight. Like many parts of APAC, live shows continue to be a big part of Filipinos' routines. Today, almost half here pay for cable, and only 14% don't watch any broadcast channels on a typical day. But their TV time is much more divided than it used to be, and the scales are starting to tilt toward online videos. Overall, the Philippines is a great market for advertisers eyeing up streaming services in APAC, as it's second to only Thailand for the time its consumers spend watching them.

A similar scenario is being played out in Taiwan. In Q2 2019, the country ranked 12th out of 14 APAC markets for hours devoted to streaming services; it's now 7th, with major players in the streaming space putting more stock in the nation's consumers.

Another change brands will have to adjust to are APAC's device preferences. This time last year, the most common way consumers here watched shows or movies was via a TV set. They're now more likely to watch on mobiles or tablets, and it's the only region where this is true.

Smartphones have been a huge driver of increased time spent on streaming services. In fact, markets with a higher average daily time on mobile spend the longest watching them. And people have adopted habits that suggest this mobile-first TV trend is unlikely to reverse; compared to the global average, APAC consumers are 25% more likely to watch streaming services outdoors, and 28% more likely to watch them on public transport.

Though, this doesn't mean watching together on bigger screens is dying out. The most popular space to watch on-demand TV is in a living room; plus, smart TV ownership in APAC has grown 8% year-on-year, and 12% in China – a very mobile-heavy market.

Brands ultimately need to implement cross-device advertising strategies, optimise their content for smaller screens, and encourage engagement on social media – as around 1 in 5 of those who use a second screen while watching TV interact with the online content of a show or share an opinion about it while doing so.

Market in focus: The Philippines' TV landscape over time

Average daily time Filipinos say they spend watching broadcast/online TV in h:mm

- ● Broadcast TV ● Online TV

	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023
Broadcast TV	2:32	2:19	2:25	2:10	1:54	1:48	1:32
Online TV	1:21	1:25	1:36	1:31	1:35	1:35	1:32
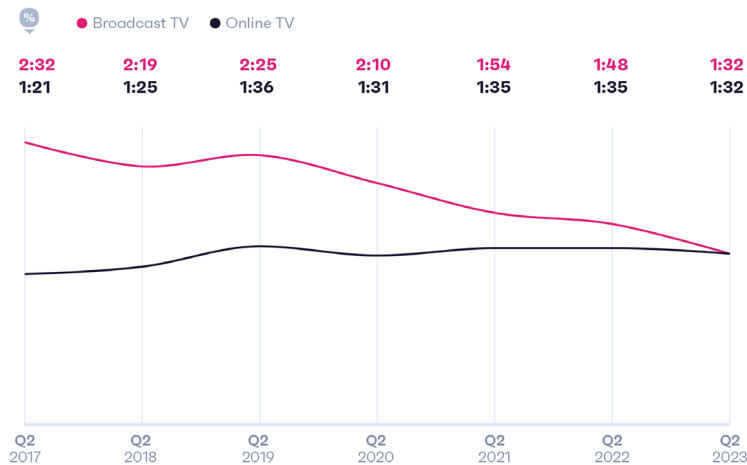
? On an average day, how long do you spend watching television/online TV?

GWI Core Q2 2017-Q2 2023   18,855 internet users in the Phillippines aged 16-64

More consumers are watching TV on their smartphones

% of APAC consumers who say they use the following devices to watch any type of TV

● Q2 2022   ● Q2 2023

	TV set	Phone/tablet	Laptop/desktop	Games console	Streaming device/smart stick
Q2 2022	75	67	50	11	10
Q2 2023	69	71	44	8	9
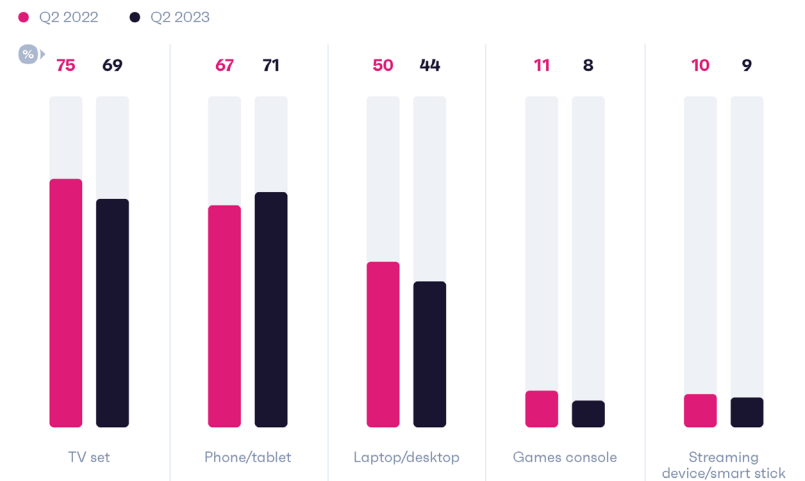
? Which of these devices do you use to watch Live TV/TV channels | on-demand TV/streaming services?

GWI Core Q2 2022 & Q2 2023   185,074 internet users in 14 APAC markets aged 16-64

GWI.

YouTube is the top video platform in all but three APAC markets and, outside China, two-thirds say they use it on a daily basis. As a mobile-first region, many consumers log on when they get a spare few minutes. The region's fondness for short-form clips also makes YouTube attractive – over a quarter of consumers here have used YouTube Shorts in the last month, which means interactive and concise campaign material will land well.

And we can't forget price. YouTube, despite offering a premium service, is at its core a free platform, making it a natural choice for cost-conscious consumers. 39% in 5 APAC markets say they're considering canceling or have canceled a subscription, compared to 24% outside the region. The top reason for this is market saturation – people feel they're paying for too many services already, and can't justify the cost.

Netflix has responded by making its basic plans more affordable. The service remains the number one paid-for platform, but others are also tempting people. Across 7 markets, engagement with Disney+ has grown 17% year-on-year, and it continues to prioritise localised content. Localization is set to be a key driver of growth going forward; Indian platforms Voot and Sony LIV climbing the regional charts as more here step into the online TV space reveals their appetite for area-specific content. It's worth keeping an eye on the platforms investing in this, as they're more likely to have engaged audiences.

Top 5 online video services by market

🇦🇺 **Australia**	🇨🇳 **China**	🇭🇰 **Hong Kong**	🇮🇳 **India**	🇮🇩 **Indonesia**
Netflix	iQiyi	YouTube	YouTube	YouTube
YouTube	Youku	Netflix	Disney+ Hotstar	Netflix
Disney+	MangoTV	Viu	Netflix	Vidio
Amazon Prime	Sohu	myTV Super	Amazon Prime	Disney+ Hotstar
9Now	Bilibili	Disney+	ZEE5	Viu

🇯🇵 **Japan**	🇲🇾 **Malaysia**	🇳🇿 **New Zealand**	🇵🇭 **Philippines**	🇸🇬 **Singapore**
YouTube	YouTube	Netflix	YouTube	YouTube
Amazon Prime	Netflix	YouTube	Netflix	Netflix
Abema TV	Disney+ Hotstar	TVNZ	Viu	meWATCH
Netflix	Astro Go	Disney+	YouTube Premium	Disney+
Nicovideo	Viu	Amazon Prime	iFlix	Viu

🇰🇷 **South Korea**	🇹🇼 **Taiwan**	🇹🇭 **Thailand**	🇻🇳 **Vietnam**
YouTube	YouTube	YouTube	YouTube
Netflix	Netflix	Netflix	VTV Go
Tving	Disney+	cH7HD	FPT Play
YouTube Premium	Line.me TV	WeTV	Netflix
Disney+	YouTube Premium	Viu	K+

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

GWI Core Q2 2023   90,311 internet users in 14 APAC markets aged 16-64

Once companies have decided where they're best off advertising, it's good to have a handle on what qualities consumers most want campaigns to have.

While Europeans want their advertising to be entertaining, those in APAC are more information-driven and keen for customization. On-demand TV viewers here are 14% more likely to want personalised recommendations than the global average, which is an advantage CTV ads have over traditional ones. In fact, on-demand TV watchers are more likely to describe ads they see between shows as relevant than other APAC consumers.

DE&I (Diversity, Equity & Inclusion) is huge here too. Viewers in APAC are the most likely in the world to expect ads to promote diversity and inclusivity, and are 15% more likely to have a negative view of ads which don't include this than the average consumer.

The good news? If you hit the mark, your ads are relatively likely to make an impact. Not only are the region's viewers more likely to have watched an entire online video ad in the last 7 days than the average consumer, but they're more likely to have shared an ad with friends and family, providing secondary word-of-mouth reach for your campaigns. ◼

The qualities TV streamers most want ads to have
% of on-demand TV streamers in APAC who say they most want ads to do the following, and the index*

		IDX
Give me product information	50	0.98
Provide discounts/special offers	45	0.98
Teach me something new	42	1.06
Give me personalized recommendations	37	1.14
Be entertaining	32	0.92
Raise awareness about a social or environmental cause	30	1.15
Promote diversity and inclusivity	27	1.15
Be relevant to me/my identity	25	0.96
Make me laugh	22	0.95

? What do you most want ads to do for you?   GWI Zeitgeist October 2023

KEY TAKEAWAYS
Here's a summary of our main trends for advertisers to watch in 2024:

◼ Markets like India, the Philippines, and Taiwan have seen big shifts in viewing habits, and are among those most likely to find out about new products via TV streaming ads; investments in them are clearly paying off.

◼ TV watching in APAC is now mobile-first, so brands need to ensure they implement cross-device advertising strategies, optimise their content for smaller screens, and encourage engagement across social platforms.

◼ Advertisers in APAC need to understand the importance of creating inclusive ads tailored to specific audiences. Viewers here are more likely to share ads with others if they hit the mark.

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

by Matt Smith
Trends Manager, GWI

WHEN VIEWERS DECIDE WHAT TO WATCH
THEIR MINDSET MATTERS

When consumers settle in to watch TV of any kind, including streaming, they have a series of decisions to make – starting with the type of service they are going to use. What influences the choices that take place along their viewing journeys?

This is a question we are often asked, and it was central to our recent study, which explored the mindsets that drive TV viewing globally by surveying 5,000 people ages 18 to 64 across eight countries (Pluto TV global key markets Brazil, Canada, Germany, Mexico, Spain, Sweden, UK, and US). We observed few differences between markets and expect that these findings would be true for Asia. As part of this research, these respondents walked us through over 12,000 recent TV viewing occasions that took place across four types of services: linear TV (something from a channel on a TV or a TV service), SVOD (subscription video on demand services), FAST (free ad-supported streaming TV services), and other, non-FAST free streaming services.

We learned that consumers turn to TV to address a variety of needs, such as the desire to immerse themselves in another world, get up to speed on what's happening in the culture, or distract themselves from everyday life.

Viewers are most often looking to satisfy their need for comfort, which accounts for almost half of consumers' viewing occasions. Comfort viewing happens when people crave "me time" and want to relax, in a variety of locations (including their bedroom) and across a variety of content types. Comfort viewing happens in similar measure across the four types of TV services.

Looking at these four types of TV services specifically, we found that each has its own unique way of addressing different consumer needs.

LINEAR TV stands out the most for fulfilling the needs for routine and external connection. Routine viewing is habitual, often happening alone and at home, with soaps and news as key genres. When viewers want external connection, their goal is to experience something at the same time as others. This typically happens with other people, in any setting, with emphasis on live content like sports or news.

SVOD services are notable for their ability to fulfill consumers' needs for immersion and togetherness. Immersive viewing allows viewers to absorb themselves in something, often watching on the living room TV with others, with drama as a key genre. Togetherness viewing addresses the desire to spend quality time with others and can look like getting cozy on the couch for a family movie night.

FAST services strongly address the need for external connection, along with several needs that other services don't satisfy quite as well – to explore, distract, and uplift. Viewers looking to explore want to broaden their horizons; this exploratory viewing typically happens with other people, with documentaries and science/nature as key genres. Those in search of distraction are often in need of background noise or ambiance while alone, with "home and garden" as a preferred genre. And viewers who desire uplift want to feel revitalised and brighten their mood, typically with others, and often through comedy shows or movies.

FREE ON-DEMAND SERVICES (EXCLUDING FAST) are most successful at meeting the need for external connection, but do not stand out for uniquely fulfilling any need when compared to the other types of services.

In short, the needs that consumers are looking to fulfill inspire not just their content choices, but their decisions about the types of services they use to deliver that content. While all services successfully satisfy the need for comfort, linear TV stands out for offering routine and external connection, SVOD shines at providing immersion and togetherness, and FAST excels at delivering external connection, exploration, distraction, and uplift. ∎

by Christian Kurtz,
SVP Global Streaming Research & Insights, Paramount

Paramount Global (NASDAQ: PARA, PARAA) is a leading global media and entertainment company that creates premium content and experiences for audiences worldwide. Driven by iconic studios, networks and streaming services, Paramount's portfolio of consumer brands delivers one of the industry's most important and extensive libraries of TV and film titles.

WHY THE NEXT GENERATION OF MEDIA
REQUIRES A NEW APPROACH TO CLOUD

The streaming and online video content industry is undergoing a complete transformation in Asia Pacific. From what was once a centralised one-way broadcast model, media companies now have the promise of delivering decentralised, tailored, personalised, and always-on content experiences to their audiences. Media companies have an opportunity to create new and innovative experiences for their customers.

The possibility of this transformation is driven by new innovations in technology. Artificial intelligence, machine learning technologies, and automated content creation techniques are expanding the scope of what is possible in storytelling personalization. However, delivering this next generation of content experiences - such as real-time gaming, high resolution live streaming, and augmented and virtual reality (AR/VR) - seamlessly to consumers requires a new approach to the underlying infrastructure.

In order to provide optimum content experiences for viewers, whenever they want them, anywhere in the world, a fundamentally new approach to cloud computing is required that shifts how developers and companies build, deploy, and secure applications and data across the entire continuum of computing - from the core of the internet, to the edge where consumers experience it. The ability to bring digital experiences closer to billions of internet users around the world opens up the possibility to deliver this next generation of content applications.

THE FUNDAMENTAL NEEDS OF THE NEXT GENERATION OF MEDIA

To enable the experiences that consumers now expect, media companies must adapt their strategies accordingly. Media companies require a platform to store and process massive video files, the ability to scale to meet surges in viewer demand, and the ability to gain an optimised return on cloud investments through transparent pricing and lower egress costs.

While online streaming is an experience already deeply integrated into our daily lives, delivering it requires overcoming a set of unique technical challenges that are unseen to the consumer. With large amounts of data being transmitted to stream videos, there is always a real risk of latency issues, experienced by consumers as buffering, which is a key technical and customer experience pain point.

In addition, live video streaming is an excellent tool for content distributors and other organizations seeking to excite and connect with their audience in real-time. However, the delivery of live video streams can be complicated because of the diversity of platforms, access networks, and streaming formats competing in today's online media ecosystem. For example, if audience turnout exceeds server capacity, users can be shut out of a live video streaming event. Beyond demand, video performance can also suffer as a result of network congestion, latency and packet loss, forcing audiences to disengage and pursue better video quality elsewhere.

Deploying cloud computing as close as possible to where consumers are experiencing the content minimises these risks. It ensures the highest viewing quality for consumers, even in the highest resolutions, while at the same time enabling media providers to effectively manage network congestion and latency issues.

CHOOSING A NEXT-GENERATION CLOUD SERVICE

The next generation of OTT services requires complex applications and demanding workloads that will be best delivered the closer they are to the user. Akamai Connected Cloud, a massively distributed edge and cloud platform for computing, security, and content delivery, is designed to keep applications and experiences closer, and threats farther away. Through the world's most distributed network - with more than 4,100 global locations - the architecture enables streaming services to better serve viewers, even in more difficult-to-reach locations currently underserved by traditional cloud providers.

The best cloud computing capabilities are those that enable OTT operators to deliver higher quality and more personalised video experiences to their audiences, while at the same time helping them to realise lower, more predictable operational costs and improve efforts to monetise content. For viewers, that means low-latency, personalised, and high-performing experiences. For OTT operators, it means global scalability with lower-cost and predictable pricing. ∎

by Jay Jenkins
CTO, Cloud Computing, Akamai Technologies

DOLBY ENHANCES THE CONTENT ECOSYSTEM
TO DELIVER CUTTING-EDGE AUDIO-VISUAL EXPERIENCES

In recent years, the entertainment landscape has undergone a significant transformation with the rise of streaming platforms. Traditional television and film distribution models have been disrupted, making way for a new era of on-demand content consumption. The global OTT market size is expected to reach USD$332.2 billion by 2025, according to a report by Grand View Research. This growth can be attributed to the increasing penetration of smartphones and the internet, as well as the availability of high-speed internet connectivity and technological advancements. In this digital landscape where content is king, the importance of high-quality audio and visuals cannot be overstated.

The demand for superior audiovisual technologies has become essential due to their intrinsic value in enhancing the viewing experience, thus bolstering consumer engagement. Dolby, an innovative technology in the industry, has risen to meet this demand by pushing the boundaries of audiovisual experiences. What was conceived as a vision in the past has blossomed into a dynamic ecosystem that is reshaping how audiences across the globe consume content.

Dolby's journey has been one of relentless innovation and strategic partnerships. Recognizing the potential to transform the entertainment landscape, Dolby set out to build a robust ecosystem. In key countries across Southeast Asia and Australia-New Zealand (SEA, ANZ), Dolby's presence has grown significantly. With close to 70 production facilities now equipped with Dolby Atmos and/or Dolby Vision, the regions have become the hub for cutting-edge content production.

"In our world, sound is three-dimensional, Dolby Atmos is like a new dimension to listening or watching movies. Dolby Atmos is able to create the sounds as if it was the real world," said Au Traithep Wongpaiboon, Managing Director, Kantana Sound Studio.

Adding, Chaitawat Thrisansri, Colorist, White Light Studios said, "Dolby Vision helps support the work in terms of when we start grading HDR on the PQ curve, it also helps to control the quality of the picture and make it easier for us to finish the job perfectly."

What truly sets Dolby apart is its dedication to inclusivity and cultural authenticity. In 2022, the company worked with global streaming platform partners to have tentpole shows dubbed In Dolby Atmos for local languages such as Tagalog, Thai, and Bahasa. These efforts to tailor content for native audiences, combined with the immersive experience of Dolby Atmos, have elevated entertainment to new heights.
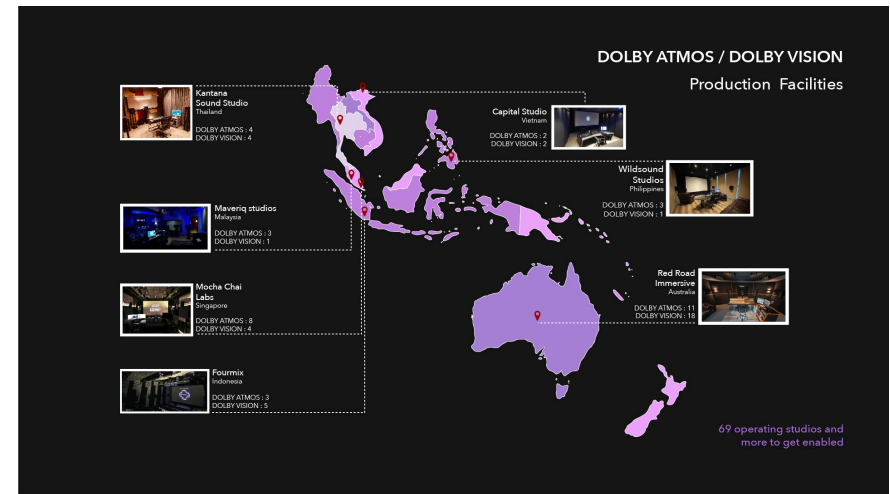
Ashim Mathur, Vice President of Marketing, APAC, at Dolby, encapsulates Dolby's journey in these words: "Dolby's content ecosystem grows from strength to strength. The involvement in the content ecosystem can be divided into 3 verticals: content creation, content distribution and content consumption. We work extensively with content creators like filmmakers, colourists, sound engineers, and sound designers from across the world, to help them create as they envision."

From the modest beginnings to the present, the company's initiatives have invigorated content creation, and it looks forward to enriching and educating the content creation industry in the region and to empower the content creators to continuously learn and captivate narratives that engage audiences' senses. Through strategic partnerships, technological innovation, and an unwavering commitment to transformative experiences, Dolby has set new benchmarks. ∎

by Ashim Mathur
Vice President of Marketing, APAC, Dolby

DOLBY LABORATORIES, INC. *(NYSE: DLB) is based in San Francisco with offices around the globe. From movies and TV shows, to apps, music, sports, and gaming, Dolby transforms the science of sight and sound into spectacular experiences for billions of people worldwide. We partner with artists, storytellers, developers, and businesses to revolutionise entertainment and communications with Dolby Atmos, Dolby Vision, Dolby Cinema, and Dolby.io.*

AsiaSat

OPTIMISE CONTENT DELIVERY
WITH HYBRID SOLUTIONS

The rapidly changing video consumption landscape has created challenges for broadcasters and content providers on how to satisfy the flexibility that consumers are demanding around their content consumption patterns. With the state of linear TV and streaming services varying from country to country, AsiaSat has been focusing on offering hybrid end-to-end solutions that will effectively address customer demands for content delivery across multiple platforms by combining the strengths of traditional broadcast infrastructure with the new cloud-based digital technologies to reach both B2B and B2C segments.

SATELLITE REMAINS CRITICAL

With satellite being the best one-to-many distribution system providing the benefits of cost efficiency and rapid deployment, it plays a critical role in content distribution in Asia Pacific, a region of significant diversity in infrastructure and economic development. In developing regions where infrastructure is lacking and penetration of large streaming platforms is low, and with a language barrier for content, traditional satellite/cable pay TV distribution of linear TV has well-established capabilities to provide customised and localised programming that caters to the specific tastes of individual markets.

However, as the way people consume content continues to evolve, it becomes crucial for broadcasters and content providers to embrace a hybrid approach, leveraging IP, OTT and cloud-based delivery methods to expand their access to redistribution platforms, hotel networks, and directly to end consumers through emerging distribution models like FAST and connected TVs. By doing so, content providers can effectively reach a broader audience, while also creating new revenue streams.

HYBRID SOLUTIONS
FOR END-TO-END DELIVERY

In response to the evolving market, AsiaSat has strategically expanded into providing services to encompass more than just an OTT platform or VOD. Through the acquisition of live-streaming company OCGL, and content distribution and media solutions company Lightning International, AsiaSat has taken decisive steps to adopt a comprehensive hybrid approach that goes beyond a mere technology and transmission platform, embracing a full range of services that cater to customer demands and increase audience penetration in different market verticals.

AsiaSat's end-to-end media solutions include, but are not limited to, channel distribution, affiliate sales and management, that enable broadcasters to

AsiaSat

simplify and streamline video distribution logistics, provide customised content lineups and most importantly secure last mile delivery to their target end customers, whether it is B2B or B2C, in a diverse and fragmented market like the Asia Pacific.

Further, as an extended solution to broadcasters, AsiaSat's live streaming service facilitates real-time audience engagement during live event coverage, and through interaction among the host, performers and audiences, creating new ways to monetise content and by making them available on multiple distribution platforms.

While streaming TV progressively competes with satellite/cable pay TV as the most-viewed TV source in a number of developed markets, recent reports also highlight a decline in the number of streaming services and associated consumer spending as markets mature and economic conditions stabilise. Amidst the divergent trends of development, the adoption of a hybrid approach enables broadcasters and content providers to optimise content delivery by expanding audience reach, enhancing operational efficiency, and maximising monetisation potential along with the flexibility and agility they need to thrive in today's rapidly evolving media landscape. ∎

by Roger Tong
Chief Executive Officer, AsiaSat

*For more than 30 years, **ASIASAT** has been providing reliable satellite connectivity, media and data solutions to customers through its best-in-class satellite fleet and ground infrastructure. From content distribution to TV platforms, telcos, hotels; IP, OTT and cloud-based delivery; to live streaming; hosting services; VSAT solutions serving maritime, aviation and mobile backhaul, AsiaSat helps bridge the digital divide, aiming to be the foremost satellite solutions provider in the Asia Pacific.*
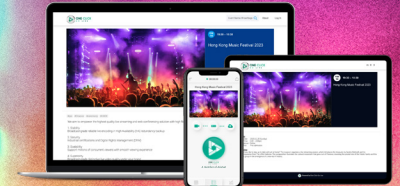
INTELSAT.

FAST CONSUMER DEMANDS & THE EVOLVING MEDIA MARKET

Programmers are facing new pain points thanks to changing consumer demands and evolving trends in the overall media landscape.

With the prevalence of new services, programmers are facing new challenges in meeting consumer demand. The increase in streaming applications has been disruptive, causing those who rely on traditional linear distribution to lose subscribers. As a result, programmers are tasked with focusing on the consumer relationship and integrating DTC streaming services into their portfolio of offerings.

Globally, video consumption is increasing. Over the past two years alone, it's grown by 60%. This is largely due to growth seen in Over-the-top (OTT) and IPTV services worldwide. As video consumption over OTT and IPTV services continue to increase, so does data traffic. Video over data now accounts for 69% of global media traffic and is slated to increase to 79% by 2027. As a result, broadcasters are increasingly shifting investments to OTT services. This includes launching their own OTT services and providing hybrid options, which include both OTT and traditional television.

A rapidly emerging component of the streaming world is FAST, or Free Advertising Supported Television channels and platforms. FAST platforms are networks of channels that have leveraged the growth of connected and smart TVs.

Consumer demand for connected TVs is greater than ever before. These TVs have become more available and affordable, making them a realistic and ideal option. This market has also become important for advertisers. In the United States, there were 156.9 million smart TVs installed in 2019. By the end of 2024, that number is expected to grow to 214.7 million, a 6.5% increase. And this growth is not restricted to just the United States.

The top five projected FAST TV countries based on revenue by 2028 are:
- United States: $9.7 billion
- United Kingdom: $909 million
- South Korea: $876 million
- Germany: $663 million
- India: $653 million

As more consumers cut the cord and subscribe to OTT services - both SVOD and AVOD services - FAST platforms specifically will be one of the primary ways advertisers can reach viewers.

In Asia Pacific, the way viewers consume content has drastically changed, largely driven by the increased demand for easy and reliable accessibility to programming. Viewers have transitioned to more digital and personalised viewing experiences. Many opt to watch content online or on their mobile devices.

FAST platforms in particular have gained momentum due to the availability of international, as well as unique, content

that often cannot be found anywhere else. Thirty-two percent of internet users across Asia Pacific own a connected TV. In Indonesia, seven out of ten viewers have a connected TV. In Australia, eight out of ten viewers have a connected TV. A recent study in India even shows that close to 80% of streaming TV viewers prefer to watch ad-supported content as opposed to subscribing to ad-free Subscription Video on Demand services. These numbers show an already sizeable audience and is expected to grow as smart and connected TVs continue to become more affordable.

The introduction of FAST channels has changed how distributors approach video

delivery. However, the FAST audience is typically different than those who consume cable and broadcast services. Most of the channels that are a part of FAST services are not the same as those found with traditional pay TV services, making it a substantially different offering.

So while FAST platforms are enticing for the advertising opportunities, they are still best paired with traditional pay TV services to maximise value and reach. ◾

by Gaurav Kharod
Regional Vice President – Asia Pacific, Intelsat

INTELSAT's global team of professionals is focused on providing seamless and secure, satellite-based communications to government, NGO and commercial customers through the company's next-generation worldwide network and managed services. Bridging the digital divide by operating one of the world's largest and most advanced satellite fleet and connectivity infrastructures, Intelsat enables people and their tools to speak over oceans, see across continents and listen through the skies to communicate, cooperate and coexist. Since its founding six decades ago, the company has been synonymous with satellite-industry "firsts" in service to its customers and the planet. Leaning on a legacy of innovation and focusing on addressing a new generation of challenges Intelsat team members now have their sights on the "next firsts" in space as they disrupt the field and lead in the digital transformation of the industry.

THE 'UNIFIED SERVICE LAYER':

PLANETCAST REVOLUTIONISES CONTENT MANAGEMENT, DISTRIBUTION AND MONETIZATION THROUGH AN INTEGRATED APPROACH

We work closely with the world's leading media companies and others that are not necessarily global giants but compete successfully in regional and national markets. They all tell us the same thing: they find it increasingly cumbersome and costly to navigate the various stages of post-production, content delivery and monetisation.

From companies looking to distribute to new markets or segments and those looking to revamp their existing content management systems or distribution and playout, to companies looking to expand into new geographic areas needing content localisation, to those launching new distribution points such as over-the-top (OTT) and Free Ad-Supported Streaming TV (FAST), operators of all sizes and types are seeking ways to maximise the value of their media assets and take advantage of new revenue opportunities.

To address these challenges, we are creating a 'unified service layer' that takes the pain out of today's increasingly complex workflows. In doing this, we are building on our experience of working with the full range of media operators needing end-to-end services to provide a fully integrated and connected approach to content using our proprietary technology. Harnessing our cloud-first media services empowers our customers to enhance, organise, protect and deliver video content

– boosting cost-efficiency and quality across the entire broadcast value chain.

PUTTING THE MEDIA COMPANY AT THE CENTRE

This unified service layer puts the customer at the centre of the content management, processing, distribution, and monetisation journey. It addresses the many complexities and resourcing challenges media companies face today.

Deployed through a single-window offering that brings together all our existing modules – including content management, post-production, cloud playout, IP distribution, OTT, and FAST channel services – Planetcast's unified service layer offers a seamless, fully integrated, yet modular solution. It also gives media and entertainment companies more flexibility moving forward.

This revolutionary approach is supported by Planetcast's efforts to expand our product portfolio both organically and through strategic acquisitions and partnerships. These moves have led to the enhancement of delivery capabilities such as content management and playout IP distribution. In addition, through collaborations with companies such as Switch Media and Wurl to enable content delivery via OTT platforms and dynamic ad insertion, we have further extended the service offering that clients can draw on.

THE RANGE OF PLANETCAST SOLUTIONS ACROSS THE UNIFIED SERVICE LAYER:

The key components of Planetcast's product and service offering were developed and added over 25 years of providing innovative solutions to meet the challenges and opportunities faced by global companies operating across India and Southeast Asia. They include:

Contido - A leading-edge, cloud-native content supply chain management solution designed to handle video processing and publishing across multiple platforms

Managed Post-Production Services - An ecosystem of post-production services with process automation and AI-enabled capabilities

CLOUD.X - Agile cloud playout platform designed for FAST workflows and rapid ad insertion

Recaster - A dynamic IP transport solution facilitating secure internet streams for linear channels and live sports streams

FAST Solutions - A plug and play linear streaming solution for Connected TVs in all parts of the world, offered internationally through a partnership with Wurl

OTT Solutions - An end to end OTT platform proven across ANZ, Southeast Asia and Europe with a layer of managed services powered by Switch Media

CREATING A NEW ADVANTAGE FOR MEDIA PLAYERS

Bringing our full array of services together in an integrated system offers users more flexibility and efficiency in preparing, enhancing, distributing, and monetising content – which is held in a single, easily accessible repository. This orchestrated approach replaces the traditionally fragmented workflow with one far better equipped to meet the demands of the evolving media landscape.
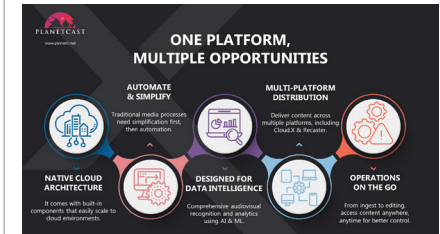
Embracing a unified service layer enables the media and entertainment companies we work with to traverse the moving tectonic plates of today's rapidly evolving media environment more easily than competitors. Having the ability to seamlessly integrate diverse media solutions and tools will be increasingly critical to any media and entertainment operator moving forward as consumer needs, demands, and expectations continue to change with each technological advance. ∎

by Sanjay Duda
CEO, Planetcast

*Founded in 1996, **PLANETCAST** has been a beacon of innovation in the global broadcast industry for nearly two decades. With state-of-the-art teleports and media centers in Singapore, Mumbai, Delhi NCR, and Cochin, we empower clients to elevate their businesses. Our expertise extends to a cutting-edge suite of cloud services, enabling seamless content management, distribution, and monetization. We are your trusted partner for transformative media solutions.*

SES

EVOLVING MEDIA LANDSCAPE:
FROM VIEWING HABITS TO NEW TECHNOLOGIES

In the span of 20 years, we have drastically expanded the way we consume content. In the dynamic Asia Pacific (APAC) region, viewers are spoiled for choice, with a multitude of regional platforms such as iQiyi, Viu, WeTv, Disney+ Hotstar, Jio Cinema alongside global players like Netflix, Max and Amazon Prime competing for their attention. So, what does this mean for the future of satellite operators and linear television providers?

HOW ARE WE WATCHING?
In today's digital landscape, modern video consumers no longer view content consumption as a simple choice as audiences shift towards a more dynamic viewing experience.

Video streaming services are widely available and accessible in the region, often offered through bundled packages from their service providers, contributing to the upward trend in subscription numbers. Despite the growth in the SVOD market, pay TV continues to lead the video market in the region for the years to come — with 69% of total revenue contributed by pay TV services in 2023 and the highest pay TV penetration rate of any region globally[1].

In specific markets like Indonesia where access to terrestrial networks and broadband infrastructure is limited, the market is projected to grow at a CAGR of 4.19% from 2023 to 2029 — reaching a value of USD 1.8 billion by 2029[2]. Despite the competition from streaming services, pay TV is expected to remain the dominant platform in most markets in APAC.

ALL ABOUT SPORTS!
Streaming services have yet to dominate the market for live sports broadcasts. While some events are available on streaming platforms, the vast majority of top tier tournaments like the Olympics, World Cups and European football cups and leagues continue to be primarily broadcast on linear television. This is because sports content owners continue to benefit from the extensive reach and advertising revenue satellite broadcasting provides.

At SES, we see that satellite remains the most reliable way to deliver content from one part of the world to another. Over the past few years, we have facilitated the delivery of key sporting events in and out of Asia. Additionally, we have established partnerships with companies like Softbank in Japan, DTH operators like Nex Parabola in Indonesia as well as Cignal and GSAT in the Philippines to provide premium quality live content for viewers across the region.

INNOVATIONS CONTINUE
Streaming services have begun to innovate and change, looking for new ways to capture the attention of potential viewers.

A notable development in the streaming landscape, particularly in the United States, is the emergence of Free Ad-Supported Streaming Television (also known as FAST), a trend that is gradually making its way into APAC. FAST operates the same way as other streaming platforms but emulates the benefits of linear television on your phone or smart TV with set up "channels". This trend underscores that the traditional linear television model remains a compelling option for audiences.

In the traditional broadcasting world, there is a notable shift towards leveraging new technology as a tool to adapt to the changing marketplace. For example, innovative software solutions are in the pipeline that, with user permission, can track viewing habits, time spent watching and preferred programs. This empowers broadcasters to better understand their viewers and create new opportunities to engage them — a capability that was previously unattainable.

Furthermore, advancements now allow for targeted ad delivery to specific audiences. This allows broadcasters to leverage the reliability and cost-effectiveness of the linear content delivery while capitalising on the benefits from targeted advertising.

Another technology on the rise that combines the two content delivery worlds is the DVB Native IP (DVB-NIP) standard that facilitates the integration of OTT and broadcast technologies into an efficient and contemporary media distribution solution. In essence, it allows for video signal delivery natively in IP via satellite to a central point for further redistribution through the mobile network. This advancement paves the way for live streaming of events to remote areas, while also alleviating strain on terrestrial network.

WHAT DOES THE FUTURE LOOK LIKE?
Even as media consumption habits evolve for many, there will always be a need to deliver reliable, consistent, and high-quality content, ensuring its accessibility even in the most remote places. By 2025, we can predict that digital video will have a penetration of 82% among internet users, accounting for 2.2 billion users in the APAC region[3]. A significant portion of this content in APAC will be delivered through satellite operators like SES. This firmly establishes them as a pivotal player in the evolving media landscape, playing a crucial role in how people access their content. ∎

by Yvonne Bertalot
Director, Product & Reach Marketing, SES

SES operates the world's only multi-orbit constellation of satellites with the unique combination of global coverage and high performance, including the commercially-proven, low-latency Medium Earth Orbit O3b system. SES's video network carries ~8,000 channels and has an unparalleled reach of 369 million households, delivering managed media services for both linear and non-linear content. Visit www.ses.com for more info.

1 *Pay TV & Online Video Forecast Report: Asia & Oceania – 2023*
2 *Indonesia Broadcasting and Cable TV Market Size Grows Steadily to Reach USD 1.8 Billion by 2029*
3 *2 billion people in Asia Pacific will be digital video viewers by 2022*

THE PREMIUM OTT ADVANTAGE
AND THE UNTAPPED OPPORTUNITY FOR ADVERTISERS

Over the course of the last year or so, with the support of our members, we have been conducting research into the usage, attitudes, and experience of premium OTT streaming services in Singapore, Indonesia, and Thailand. Our basic hypothesis is that the advertising opportunity presented by premium long form content is unique, high quality and currently underappreciated and underutilised by advertisers. Historically, linear television was the most popular destination for advertising. With the emergence and growth of social media and user-generated content (UGC) services, many have moved their budgets from linear television to these new services. However, there is no shortage of new services that continue to prioritise high quality long-form content. But because these services are potentially more fragmented, we believe that they have under-indexed in their advertising potential. Premium OTT is the natural companion and successor to long-form linear television. And fundamentally we believe the engagement of multi-episode and multi-season storylines engross and compel consumers in a way that short-form content cannot. So this research was undertaken to try to understand if this is true and if there is an untapped opportunity in premium OTT.

TOP 5 VIDEO SERVICES USED IN MARKET
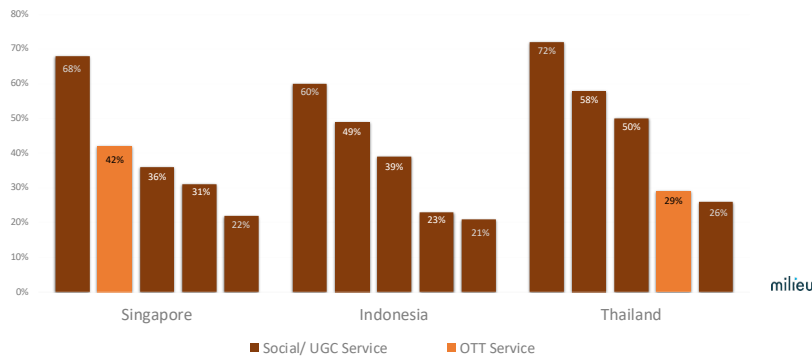
The first thing to notice is that in each market, the top five video services are dominated by social media and UGC platforms. And so consumers in each market have more experience of these services than they do of premium OTT. The following results should be viewed with this in mind and as consumption of premium OTT grows, then it is likely that the positive results will become even more pronounced.

MOST DISPOSABLE SERVICES
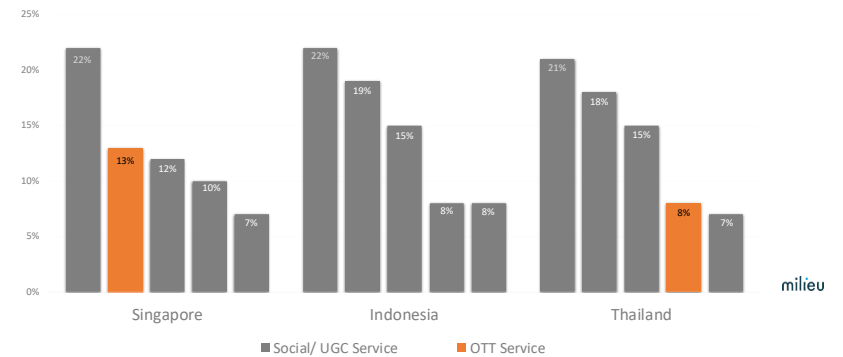
What is clear is that consumers see social media and UGC services as disposable and if forced, are much more likely to choose to give them up than they would premium OTT services.

OFFERS BEST QUALITY CONTENT
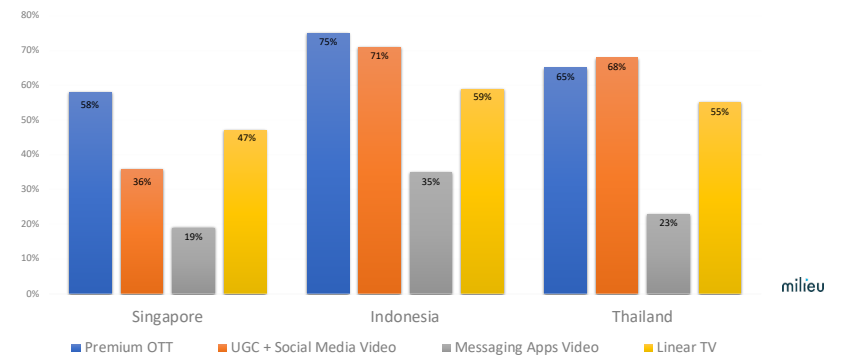
In Singapore, consumers believe that premium OTT platforms clearly provide the best quality content. The differences are less stark in Indonesia and Thailand, but the fact that premium OTT is perceived to be of such high quality even in markets where consumption is dominated by social media, speaks to its undoubted strength.

FEEL MOST IMMERSED WHILE WATCHING

Bar chart — Premium OTT / UGC + Social Media Video / Messaging Apps Video / Linear TV

Singapore: 51%, 39%, 18%, 44%
Indonesia: 54%, 69%, 31%, 52%
Thailand: 59%, 66%, 23%, 60%
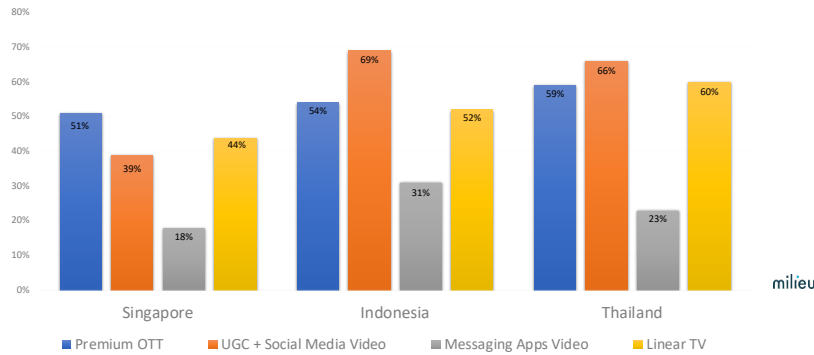
Similar to quality, in Singapore, premium OTT feels more immersive. In the less mature markets, UGC and social media are seen to be more immersive but that is likely down to their higher usage and comparatively, premium OTT performs very strongly.

ADS FEEL TOO INTRUSIVE

Bar chart — Premium OTT / UGC + Social Media Video / Messaging Apps Video / Linear TV

Singapore: 22%, 37%, 19%, 27%
Indonesia: 39%, 59%, 22%, 43%
Thailand: 33%, 59%, 20%, 48%
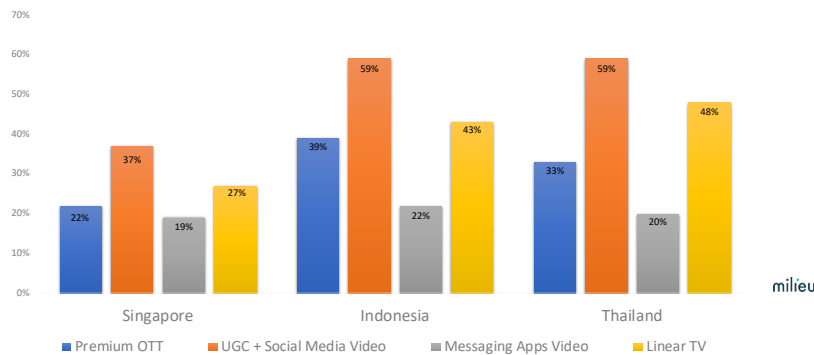
It is very clear in all markets that advertising on UGC and social media platforms is seen as too intrusive and creates a negative impression in consumers' minds. It is interesting to note the much more favourable ripple results for both premium OTT and linear television, both homes to long form content. While it may be argued that historically there has been less advertising on premium OTT, that is not an argument that can be made about linear television.

TOP RANKED EMOTIONS BY GENRE

Bar chart — TV Shows / Movies / UGC / Social Media

Singapore: 38% HAPPINESS, 39% HAPPINESS, 33% NOTHING, 40% NOTHING
Indonesia: 65% AMUSEMENT, 63% AMUSEMENT, 60% AMUSEMENT, 53% AMUSEMENT
Thailand: 65% AMUSEMENT, 62% AMUSEMENT, 57% AMUSEMENT, 46% AMUSEMENT
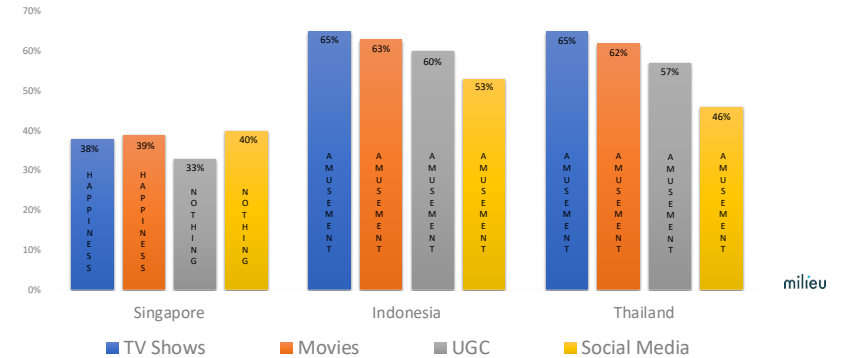
Long form content clearly produces the most positive emotions in consumers. It was very notable that in Singapore the top ranked emotion amongst those watching social media and UGC services, was 'Nothing'.

AD RECALL & IMPACT IN MASS & PREMIUM VIDEO

Mass Environment   Premium Environment

Base Videos
Video #1
Video #2

Ads
Ad #1 – Casetify – 15s   Ad #2 – Tourism Australia – 30s   Ad #3 – Ember – 15s   Ad #4 – Starbucks – 30s
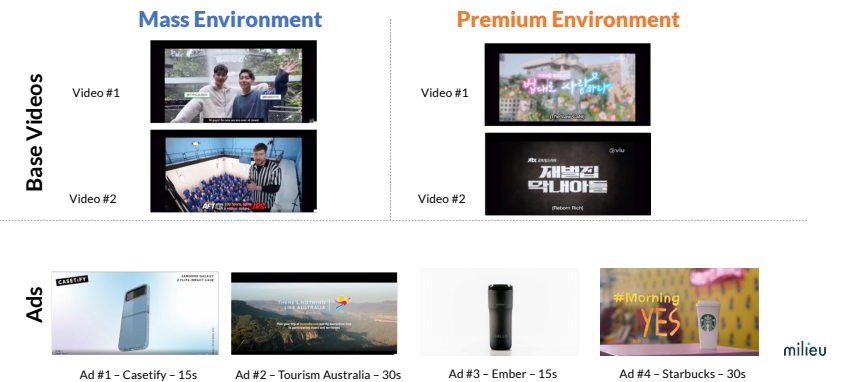
In Singapore, we conducted a separate and unique study designed to test the impact and recall of advertisements shown in different environments. The same ads were exposed in a mass environment similar to that found on a UGC platform, and also in a premium environment designed to replicate the experience of a high quality, long-form streaming service.

PRODUCT RECALL

Correct Recall
- Mass: 51%
- Premium: 56%
- +10% uplift

Incorrect Recall
- Mass: 15%
- Premium: 19%

Can't recall
- Mass: 34%
- Premium: 26%

■ Mass ■ Premium

milieu

BRAND RECALL

Correct Recall
- Mass: 51%
- Premium: 57%
- +12%

Incorrect Recall
- Mass: 10%
- Premium: 8%

Can't recall
- Mass: 39%
- Premium: 35%

■ Mass ■ Premium

milieu
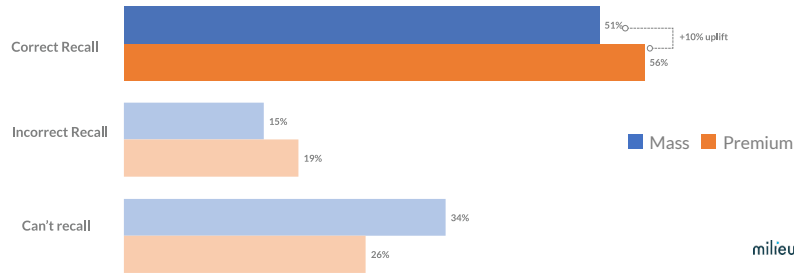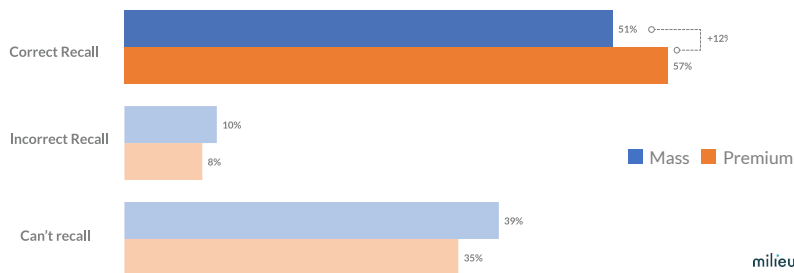
The research showed conclusively that ads shown in a premium OTT environment benefit from significantly higher product and brand recall. Clearly the content and the environment have a pronounced impact on the effectiveness of the advertising.

CONCLUSION

From all of the above research, it seems clear to us that our hypothesis is correct and that there is a huge opportunity for advertisers to see greater effectiveness by focusing more on premium video environments, where long-form storytelling is of higher quality and engages consumers in a way that social media and UGC content cannot.

The results are very clear in Singapore. In Indonesia and Thailand, where penetration of OTT services is significantly lower, the results are still impressive. It is our belief that as penetration of these services grows in the less mature markets, results will be equally as impressive there, and for those already using OTT, the difference is telling, and so for advertisers the opportunity is waiting. ∎

groupm nexus

THE ROAD TO ROI:
HOW BRANDS ARE EMBRACING ADDRESSABLE TV IN THE APAC REGION

As the TV industry transforms across the APAC region, we see that addressable TV is becoming more established as part of the communications and marketing mix. The growth across markets is undeniable, as nearly all research points towards shifts in consumer dynamics and increased investment.

Keen to build a full picture of the addressable TV market globally, Ampere Analysis, Microsoft Advertising and GroupM Nexus joined forces to conduct research covering brands, agencies and consumers. The resulting report was informed by over 100 interviews and supported by extensive bottom-up market modelling and quantitative consumer research. It is, therefore, instrumental in helping advertisers understand both agency and client perspectives around the opportunities that exist in markets at the forefront of TV's evolution.

The report revealed the scale of the growth within the sector, with addressable TV now worth $56bn and set to rise by over 50% to $87bn by 2027. Furthermore,

Global addressable TV revenue vs 'traditional' TV ad revenue ($bn)

	2017	2022	2027
Addressable TV	15	56	87
Traditional TV Advertising	151	139	135

■ Traditional TV Advertising ■ Addressable TV

AMPERE | ANALYSIS groupm nexus
Microsoft Advertising
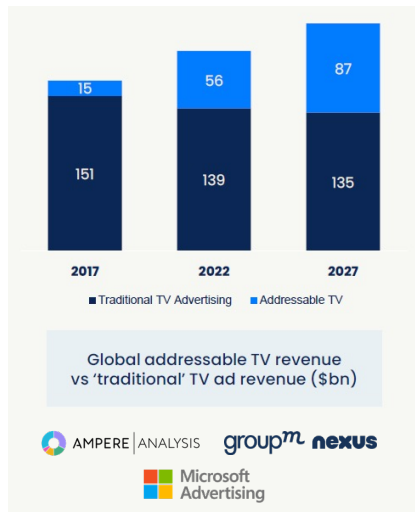
1/6 of TV and video budgets are now being spent with addressable TV services worldwide.

Focusing on APAC, linear TV growth is slowing to only 2% by 2024, while Connected TV growth is expected to reach 17% growth to $7.5 billion within the next year, according to GroupM's This Year Next Year forecast. The forecast also pegged the APAC region as the fastest growing and largest region outside of the US.
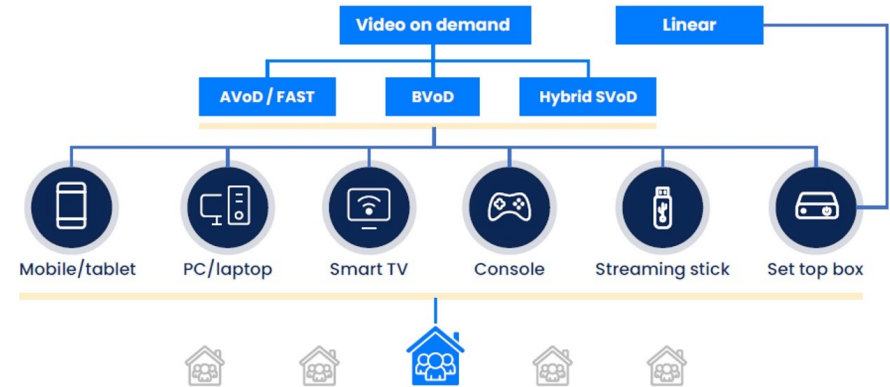
WHAT IS ADDRESSABLE TV?

With the media sector riddled with terminologies, it is important to clarify what we mean by 'addressable TV'. Addressable TV encompasses an array of platforms and technologies which allow advertisers to buy TV inventory in a targeted manner. Addressable TV is the ability to show different ads to different households while they are watching professionally produced TV content on the TV screen across on-demand, live streamed and linear viewing environments.

THREE LEVELS OF BRAND MATURITY

Ampere Analysis' research defined three levels of maturity when looking at how brands used addressable TV:

1. Experimental addressable buyers.

New to addressable TV and spending very little or nothing on the platform. They should consider using addressable TV to extend their audience reach using simple targeting criteria to market to specific audience groups.

2. Emerging addressable buyers.

Buyers with a little more experience with addressable TV begin to use it to drive campaign efficiencies, supported by deploying more advanced targeting criteria to further segment and reach audiences. They may be using A/B creative testing and optimisation.

3. Mature addressable buyers.

Sophisticated addressable buyers deploy dynamic creatives to target multiple segments or geographic locations. More advanced data solutions around 1st party data and data matching are used to power campaign performance.

![groupm nexus logo]

HOW ARE BRANDS USING ADDRESSABLE TV?

Brands are using addressable TV's capabilities to achieve key objectives in these 5 ways:

Brands are using ADDRESSABLE TV'S capabilities to achieve key objectives

Incremental Reach
especially among younger viewers who are difficult to find through other means

Creative optimisation
targeting audience segments with the creative that's most effective

Brand awareness plus performance marketing
addressable TV provides both capabilities

Cost savings
up to 50% more cost-effective than traditional ad formats

Holistic viewer journey
mapping the journey from contact to purchase via data clean-rooms

ADDRESSABLE TV'S EFFECTIVENESS IN ACTION

The cosmetics category was heavily impacted by the pandemic as consumers were required to wear masks. MAC Cosmetics, the number 1 prestige make-up brand in the Philippines, needed to innovate to remain relevant in the new normal. The brand created a new product - The Locked Kiss Ink 24HR Lipcolour - a luxurious kiss-proof, waterproof, transfer-proof lipstick that could be worn under a mask.

Using our Advanced TV solution, which combines all top streaming and connected TV platforms' inventories and enables hyper-targeting at scale, MAC Cosmetics was able to identify users based on demographics, interests, behaviour and household income by zip code. The 15 second advert was delivered in moments of their favourite series and shows, on-demand.

The result? There was a 215% lift in consumers considering MAC Locked Kiss Ink the next time they choose a lipstick, a 59% rise in purchase intent, and a 191% increase in sales between April and May 23 vs 22. ■

EXECUTIVE SUMMARY:

- Market size: The addressable TV sector is now a $56bn industry and is set to rise by over 50% to $87bn by 2027.

- Budget allocation: An average of a sixth of advertisers' video advertising budgets globally are currently being spent with addressable TV service providers, 12% in APAC

- Brands using addressable TV: There are 5 core strategies marketers could consider when looking at Addressable TV and its role in broader marketing communications.

by Alexandra Lowes
VP Client Growth APAC, Media Solutions, GroupM Nexus

GroupM Nexus, *a powerhouse of experts propelling performance and innovation at scale for GroupM's agencies and clients. With unrivalled platform accreditations, proprietary tech, and a culture of innovation, we redefine media effectiveness to drive growth for global advertisers.*

Index Exchange

PROGRAMMATIC TRANSPARENCY IN OTT:
PAVING THE WAY
FOR A TRUSTED DIGITAL ECOSYSTEM

As the digital advertising landscape evolves, transparency remains a fundamental pillar in establishing trust among stakeholders. In the realm of over-the-top (OTT) advertising, where content consumption is undergoing a transformative shift, programmatic transparency plays a pivotal role in shaping a trusted digital ecosystem.

THE CURRENT STATE OF TRANSPARENCY AND CONTENT SIGNALS IN ASIA

Transparency in the Asian OTT advertising landscape is a critical consideration, given the diverse range of cultures, languages, and regulatory environments. Presently, varying levels of transparency exist across different markets. Some regions struggle with inconsistencies in data reporting, making it challenging for media owners, buyers, agencies, and marketers to gain accurate insights into ad placements and campaign performance. Additionally, content signals, which can inform ad relevance and brand safety, are of paramount importance, as they influence consumer engagement and trust.

Inaccurate or irrelevant ad placements can lead to viewer disengagement, negatively impacting the marketers' message and the consumer experience. Maintaining brand safety is another concern, as marketers need to ensure that their content is not associated with inappropriate or harmful contexts. The lack of transparency in these areas can erode consumer trust and damage brand reputation.

BENEFITS OF OPENRTB 2.6 FOR THE ECOSYSTEM

OpenRTB 2.6, a standardised protocol for real-time bidding, is a transformative tool for enhancing transparency in CTV/OTT advertising specifically which better enables transparency throughout the bid stream. For media owners, OpenRTB 2.6 ensures that bid requests and responses are consistent and easily understandable, allowing them to accurately communicate the value of their inventory.

Buyers and agencies benefit from standardised communication that empowers them to make informed decisions about ad placements. Marketers gain better control over targeting and brand safety, contributing to more effective campaigns.

ADVANTAGES OF A TRANSPARENT OTT BUYING FRAMEWORK

A transparent OTT buying framework brings multiple advantages to the ecosystem:

For media owners, it means greater control over their inventory and the ability to present accurate data about their content.
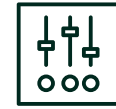
Buyers can optimise their campaigns based on real-time insights, improving ROI and campaign effectiveness.

Marketers benefit from increased visibility into the ad journey, ensuring that their messages are presented in brand-safe environments.

IAB TECH LAB TRANSPARENCY ROADMAP

The IAB Tech Lab has revealed its 2023 priorities and roadmap, which outlines the best practices to establish a transparent and secure advertising ecosystem. It addresses challenges related to data usage, supply chain integrity, and ad fraud. By adopting these recommendations, OTT media owners and media buyers in Asia can mitigate risks and create a more trusted environment for all stakeholders.

THE FUTURE OF PROGRAMMATIC EFFICIENCY IN OTT

Looking ahead, the marriage of programmatic advertising and transparency holds the promise of unparalleled efficiency in the OTT landscape. As technologies like AI and machine learning advance, marketers will be able to deliver hyper-personalised content to precisely targeted audiences. This not only enhances the consumer experience, but also optimises ad spend. With transparency as the cornerstone, marketers can confidently explore programmatic opportunities that drive engagement, conversions, and sustainable growth.

Programmatic transparency ensures a trustworthy and efficient OTT advertising ecosystem. OpenRTB 2.6, a transparent buying framework, the IAB Tech Lab's transparency roadmap, and the potential for future programmatic advancements all contribute to a landscape where media owners and buyers can collaborate with confidence. As Asia's OTT landscape evolves, embracing transparency will be the key to unlocking its full potential and establishing a thriving digital ecosystem. ∎

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/au or @indexexchange.

Magnite

WHY A QUALITY AUDIENCE AND AD EXPERIENCE IS KEY TO UNLOCKING THE FULL VALUE OF OTT

The appeal of on-demand content, content variety, personalised viewing experiences and accessibility has set the stage for the rapid growth of OTT audiences in Asia. In Southeast Asia alone, viewership has surged to 239 million. As audiences are spending more time with video content and engaging more with ads, publishers are increasingly embracing video advertising due to the allure of high CPMs.

Magnite found that streaming services are the primary way viewers access video content, surpassing traditional TV, particularly in countries with high internet penetration like Singapore, where 38% prefer CTV compared to only 4% for traditional TV.

Prioritising a seamless viewing experience matters more than ever for content providers and advertisers to drive positive brand affinity and engage viewers across all screens. Here are some key considerations to optimise user and ad experience for media owners.

ACHIEVE THE OPTIMAL AD BREAK WITH AUTOMATION

The optimal ad break maintains viewer engagement by ensuring advertising does not disrupt the flow of content with repetitive ads. With the right technology, a smart ad break combines pod fill, competitive separation and proper frequency management to help maximise revenue generation.

To make the most of each and every ad break, publishers should consider enabling competition between direct-sold and programmatic campaigns in a unified auction to increase fill rates and in turn drive higher yield from increased competition between demand sources.

Much focus has also been given to ad podding to sequence together multiple video ads, simulating a commercial TV break. Advanced technology such as SpringServe's BingeWatcher enhances ad pods by filling slots with relevant content, while also ensuring creative deduplication and competitive separation.

Frequency capping is also pivotal in shaping the optimal viewer experience. Tools such as SpringServe's Global Frequency Capping manages frequency of ads by the day, hour or minute.

DON'T OVERLOOK CREATIVE REVIEW

Without a unified view of advertising creatives, delivering a seamless viewing experience is almost impossible. Tools are needed to monitor and improve ad performance by identifying attributes like volume, image quality, and language while deduplicating ads. While crucial, creative review can be time-consuming, involving a manual audit of each ad creative before the ad server processes it.

Ad serving innovation technology offering true video creative deduplication, such as SpringServe's Bingewatcher is a fully-automated, easily scalable alternative to the manual process of creative review, streamlining the ad approval process with speed and accuracy. Automating these workflows will enable publishers to keep up with demand.

GET NATIVE WITH NON-INTERRUPTIVE AD FORMATS

According to Magnite's research, while viewers value recommendations most from friends and family, they also place a high level of trust in programming recommended on the home screen of their streaming app or Smart TV. For example, in Australia, 68% value recommendations on Smart TV home screens.

The ability for streaming services to connect audiences with relevant content has become a market imperative. SpringServe's Tiles streamlines content discovery for streamers, with custom creative showcased in non-intrusive formats for both paid and free content. Publishers can run native display ads alongside standard video ads, allowing brands to reach engaged audiences with multi-format ads in a CTV environment while driving more revenue.

THE RIGHT SOLUTION FOR VIDEO

To capture the full value of CTV and OTT audiences and maximise the number of advertisers, publishers need the right solutions to deliver an effective ad experience and maximise video monetisation. In Asia, where Client-Side Ad Insertion (CSAI) dominates, activating Server-Side Ad Insertion (SSAI) to enable a seamless ad experience is a quick win to unlock greater scale and maximise revenue.

Looking ahead, adtech will continue to revolutionise publishers and content owners' approach to building better ad breaks, offering advertisers enhanced controls and significantly elevating the streaming experience for viewers. With the rise of video ads and streaming content in Asia, publishers should embrace automation to enhance ad delivery, user experience and drive revenue. ∎

by Mete Bargmann
Commercial Director, SpringServe

*We're **Magnite (NASDAQ: MGNI)**, the world's largest independent sell-side advertising company. Publishers use our technology to monetise 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. SpringServe, the Next Generation OTT & CTV Ad Server, is part of Magnite.*

Microsoft Advertising

NEW STREAMING FORMATS AND AUDIENCES FLOCK TO CTV AND OTT,
CREATING MORE ENGAGEMENT OPPORTUNITIES
FOR PUBLISHERS AND ADVERTISERS

CTV and OTT advertising is a powerful way to reach and engage consumers at a time when audiences and inventory are growing rapidly in APAC. Compared to user generated, short form video content, CTV and OTT content offers higher quality, greater control, more accuracy, and better creativity for advertisers. Studies have shown that CTV and OTT ads have higher recall, awareness, favourability and intent than ads on other platforms. According to a study by Magna Global, advertising on OTT and CTV can lead to a 67% increase in brand recall compared to traditional linear TV advertising. Additionally, the study found that viewers who saw an ad on OTT or CTV were 42% more likely to recommend the brand to others.

Analysing audience feelings in relation to brand effectiveness is an emerging trend in recent research. AVIA commissioned research this year that found advertising on premium OTT platforms has significant uplift in effectiveness over mass streaming services. These results are due to the higher quality and exclusivity of the content on premium OTT platforms, as well as the lower ad load and clutter in comparison. Interestingly, almost 40% of the participants in the research reported they were happier after watching an hour of TV content than user generated content.

New research from System1 and Finecast, GroupM Nexus's addressable TV solution, finds that TV advertising elicits more intense feelings, more positive emotional engagement and stronger predicted business effects among addressable audiences. CTV commercials are often more impactful than standard TV ads in attracting viewer attention. CTV and OTT advertising can also leverage feel-good content, good music, intriguing stories, and brand relevance to create memorable ads for consumers.

Marketplace growth is leading to more opportunities for marketers to advertise to consumers in relevant moments when they're engaged. In terms of inventory and audience, the CTV and OTT market is growing in ever more diverse ways. In the inventory space, new premium content is being added to ad supported models thick and fast. Amazon announced that they will start showing ads on Prime Video early next year in France, Italy, Spain and Mexico[1]. In our region, Samsung India have added more than 100 ad supported, live TV channels to Samsung TV Plus, recently adding TV9 Network[2]. Foxtel's Binge launched ad supported tiers in Australia in March[3].

From an audience perspective, we're seeing incremental consumers added to this rich set of premium supply. Microsoft is combining its data assets with premium CTV and OTT content. In September, Microsoft Advertising launched Video and CTV buying on the Microsoft Advertising Platform, combining the impact and scale of video with the ease and intent data of search. JAPAC markets launched include India, Australia, Malaysia, and Thailand. Microsoft's audience intelligence is a collection of permissioned first-party data points, combined across multiple properties, that help marketer's reach target audiences, at scale. Data points include search and web activity from Bing, browser Microsoft Edge, content interests from Microsoft Start, demographics, and more.

Agencies are also increasingly planning and buying gaming advertising collaboratively with digital video. IAB Australia reports that 85% of gaming advertisers are doing this, a 70% increase from last year. The report finds that brand building continues to be the main objective for game advertising and marketing. This fits nicely with the brand building advertising opportunities that are frequently found alongside the premium content that CTV and OTT marketplaces provide.

More streaming content becoming available in APAC represents a win for marketers as they target their desired audiences in premium, engaging moments. Additional audiences becoming available through huge global players such as Microsoft means a win for the region's CTV and OTT publishers as they tap into incremental audience demand. Planning synergies with the huge gaming sector also represent a boost for publishers. The OTT and CTV marketplace outlook is exciting and full of opportunities for consumers to be surrounded by great content providing engaging brand moments.

In conclusion, marketers can take advantage of the opportunities that CTV and OTT advertising offer across a rapidly growing audience and inventory set, achieving better ad effectiveness than advertising on user generated, short form video content. ∎

by Tom Dover
Senior Director, JAPAC International Partner Sales Lead, Microsoft Advertising

Microsoft Advertising, *offers technology solutions for advertisers and publishers striving to achieve business results. Across Microsoft and our exclusive partners, we provide scalable solutions to reach consumers across all aspects of their digital lives. With first-to-market innovations, such as generative AI, we empower all parties to unlock their full growth potential.*

1 https://techcrunch-com.cdn.ampproject.org/c/s/techcrunch.com/2023/09/22/amazon-prime-video-will-start-showing-ads-from-early-next-year/amp/
2 https://www.medianews4u.com/tv9-network-launches-free-news-channels-on-samsung-tv-plus-india/
3 https://www.sbs.com.au/news/article/you-could-start-seeing-ads-on-your-tv-streaming-services-soon-heres-how-it-will-cost-you/bc11kudd5

≡O publica
by IAS

MAXIMIZING REVENUE:
PUBLICA BY IAS' GUIDE TO MONETIZATION STRATEGIES FOR CTV PUBLISHERS IN APAC

In the rapidly evolving landscape of CTV in APAC, publishers are constantly seeking innovative ways to monetise their content effectively. Here we will explore some of the key options to maximise revenue potential and user experience.

Demand for advertising can come in many forms, from direct via Insertion Order, Programmatic Guaranteed deals, Private Marketplaces or the Open Market.

Some of the key considerations include:

MEDIATION
Who is mediating your demand to make decisions on which advertising to run for a specific spot, which demand are they including and what factors are involved in this mediation? Mediation is a popular choice for publishers seeking to federate multiple demand sources seamlessly in a single location to make the best yield decisions, but sometimes when technology is not optimised for streaming environments this can restrict yield optimisation, resulting in under indexed CPM's.

UNIFIED AUCTION
Unified auctions offer a simplified solution to increase competition among advertisers, particularly by letting SSPs compete on a level playing field (i.e. not called sequentially in a "waterfall") which increases bid density and the likelihood that a successful ad will win in an auction. It ensures efficient allocation of impressions to the highest bidding demand source, leading to better yield management.

The next decision to make is Ad Insertion and here we have two options: Server-Side Ad Insertion (SSAI) or Client-Side Ad Insertion (CSAI) which plays a pivotal role in a publisher's monetization strategy.

Exploring each:

SERVER-SIDE AD INSERTION (SSAI)
SSAI involves stitching ads into the video content on the server-side before delivering it to the TV or viewer. This results in a seamless and uninterrupted viewing experience, as ads cannot be blocked or skipped, and the ad is in the same stream as the content. SSAI also provides enhanced analytics and reporting, allowing publishers to gain insights into ad performance and viewer behavior. Being delivered via Servers, SSAI also has the benefits of Server-to-Server Integrations with downstream partners (Unified Auctions, Ad Server etc.) reducing latency and increasing potential fill/revenue.

CLIENT-SIDE AD INSERTION (CSAI)
CSAI, on the other hand, inserts ads into the video player on the viewer's device. CSAI typically results in latency, particularly in live environments, leading to a less premium viewing experience and potential loss of revenue.

A final consideration are the business rules set by a publisher, these can include deduplication from different demand sources, frequency rules, ad length (min and max), if podded bidding is allowed and which signals are being passed to bidders. If these rules are too tight, this can result in unfilled ads as the demand is constricted demand, whereas these rules being too loose can mean a bad viewer/advertiser experience with over frequency or competitive advertisers side by side in pods. A publisher Publica worked with saw a 60% increase in programmatic CTV revenue after unifying their SSP partners into a single auction environment - moving from a waterfall where the highest bidding SSP was not always called then - and passing this highest bid to the final mediation layer.

60% Uplift by Unifying Auction

Legend: ■ Waterfall Auction ■ Unified Auction

Y-axis: 0, 10, 20, 30, 40

X-axis: German Publisher
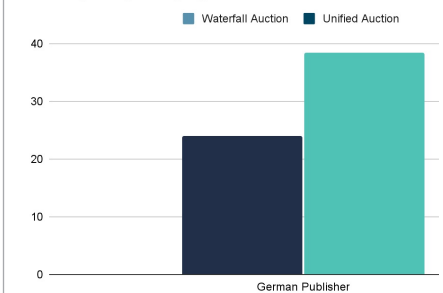
Overall there are a lot of considerations to be made, from architecture with waterfalls vs mediation or unified auction, how the ads are inserted and what rules a publisher wants to enforce - all of which can impact the Publisher's monetization strategy and the quality of the viewer's Ad break experience. ∎

by Clement Birdsall
Senior Publisher and Platform Development Director, APAC, Publica by IAS

Publica by IAS is a leading Connected TV (CTV) ad-server and works with many of the world's biggest broadcasters, TV manufacturers, and streaming apps. Headquartered in New York, Publica provides solutions for publishers to maximise their revenue across their CTV inventory through key solutions including a Unified Auction, Ad Pod Management, Audience Management, Server-Side Ad Insertion (SSAI), Contextual Management, Ad Quality Management and Measurement and Verification.

PubMatic

UNLOCKING THE PROMISE OF PROGRAMMATIC
FOR VIDEO & CTV BUYING

Despite streaming TV eclipsing linear TV in terms of viewer growth, data capabilities and flexibility, the ad buying mechanisms used to transact this media have not advanced at the same pace. Even in the streaming-centred year of 2023, non-programmatic insertion orders still account for the vast majority of CTV transactions.

That's an unsustainable level of inefficiency for such a fast-growing and dynamic channel. As consumer behaviour shifts towards streaming, it becomes increasingly clear that advertisers need a more efficient way to transact across CTV and video inventory.

Today's advertisers require the efficiency and transparency of programmatic across all their video campaigns, and that calls for an end-to-end Supply Path Optimization (SPO) approach that puts buyers in control of their media buying strategy. As the needs of advertisers have changed, they are looking to their platforms and partnerships to deliver new value:

1. GREATER STRATEGY CONTROL
Advertisers need to be able to run campaigns the way they want. That means they need complete control of the digital supply chain, right at the supply source. They need solutions that let them curate premium video inventory, create campaigns, execute programmatic media, and optimise in real-time.

2. GREATER EFFICIENCY
The right platform helps advertisers and publishers alike maximise their working media by reducing associated tech costs. Media buyers want to drive efficiency across video campaigns, with no hops, and some aren't aware of just how many fees might be built into the supply chain: DSP and SSP fees, data add-on fees, managed service fees and others. The right technology enables advertisers to only bring in the components that add real value to ensure the maximum amount of an advertiser's budget that goes toward actual working media. It also reduces costs and time spent compared to direct activations by leveraging programmatic automation, accessing lower platform fees and SPO benefits, without managing deals across multiple platforms.

3. ACTIVATION BENEFITS
Self-contained buying platforms don't just provide more efficiency than direct buys. They provide the added benefits of less data-leakage, higher match rates, lower fraud, increased transparency, closer inventory connection and stronger performance than traditional programmatic supply chains.

4. ACCESS TO SELL-SIDE DATA
Advertisers also want the ability to leverage the robust insights available within sell-side data, which often aren't available through DSPs. As such, they're looking for platforms that unlock these insights for more-robust video and CTV campaign planning and execution.

5. SUSTAINABILITY & RESPONSIBILITY
The advertising industry has awoken to the need for a sustainable and responsible media supply chain. Solutions representing one layer of tech create fewer carbon emissions than the standard programmatic supply chains. Emerging supply chain alternatives enable advertisers to reduce their carbon footprint and expand their green spending — in other words, achieving their KPIs while making a positive change.

Advertisers are embracing automation to get closer to video publishers and drive the efficiency and transparency that have long been the promise of programmatic. By modernising and customising the digital advertising supply chain based on customer needs, emerging industry tools are bringing automation to the pool of CTV and video inventory that is still using outdated transaction methods.

It's time for advertisers to unlock the efficiency and transparency of programmatic across all their video campaigns with an end-to-end solution that puts buyers in control of their media buying strategy, while simultaneously driving more revenue to publishers.

They no longer need to choose between the automation and real-time optimisation of programmatic or the quality and control of direct IOs. With new tools, buyers can execute direct deals across premium video inventory with fewer hops, enabling a seamless transition of their direct business for better visibility, stronger campaign performance, fewer fees, and greater sustainability. ∎

by Sudipto Das
Vice President, Advertiser Solutions, APAC, 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. To find out how PubMatic can support your CTV and video strategy, reach out to our team.

SAMSUNG Ads

IS TV, JUST TV?

The subscription-funded model has enjoyed its position of power and popularity in the TV streaming landscape for more than a decade. However, the dominance of this one-size-fits-all model has started to show its cracks. Despite this, the demand for streaming content has not subsided, in fact - it's still growing and paired with the growth of Smart TV adoption - streamers are set to be a very prominent TV audience subset.

WE ARE WITNESSING THE NEXT STAGE IN STREAMING'S EVOLUTION

The evolution of streaming TV has given rise to FAST; a free ad-supported streaming model that offers viewers a huge range of content without subscription fees through a TV-like experience. TV with ads? It seems the future of streaming TV may have more in common with the past than we think.

Within three years, FAST revenues are projected to reach US$12 billion globally. Australia alone will be one of the world's top five markets by 2027 at US$307 million while Asia's revenues will increase 45% to almost US$800 million, according to Statista.

The surging popularity of CTV is one of the biggest drivers of FAST. Amagi reports that many countries, including Thailand and Vietnam, are now pushing towards or past 50% penetration. Smart TVs now form 89% of the total TV market in India, and daily active CTV users are forecasted to hit 40 million by 2025 alone.

AUDIENCES ARE STREAMING AHEAD FAST

FAST might still be the new kid on the block on this side of the world, but big-name players, from FIFA to Jamie Oliver, continue to launch their own channels - and audiences are taking note. While there's no doubt FAST is growing in popularity, it's unlikely to replace paid subscription streaming services or other formats, just as those have not replaced linear.

Viewers predominantly watch free streaming TV as a supplementary offering along other types of services. In a recent Samsung Ads study, we saw six in ten (64%) agree that content is improving on free services. Demand for free, high-quality content has become one of the biggest catalysts for FAST growth. Consumers - particularly those reining in their household spending - are now benefiting from a huge choice of genres and channels in exchange for ads.

THE LEANBACK COMEBACK

FAST is becoming the go-to platform for viewers who just want to switch on, without endlessly scrolling through services and apps figuring out what to watch. It caters to a diverse audience and offers a new viewing format that enables old-favorites or niche-interest channels to be programmed at low cost. Today, one of FAST's biggest attributes is that it gives content players the opportunity to remonetise underused content by reaching new audiences.

This "lean-back" style of viewing also removes the nightly debate of what to watch, for over two thirds (65%) of people who get frustrated within 15 minutes if they can't find something they want to watch.

Frustration level (All markets)

Straight away	10%
After a few minutes (i.e. after 5 minutes)	35%
After some time (i.e. after 10 minutes)	30%
After a long time (i.e. after 15 minutes)	12%
Not applicable (I wouldn't get frustrated in this situation)	14%

65% will get frustrated shortly after not finding content to watch.
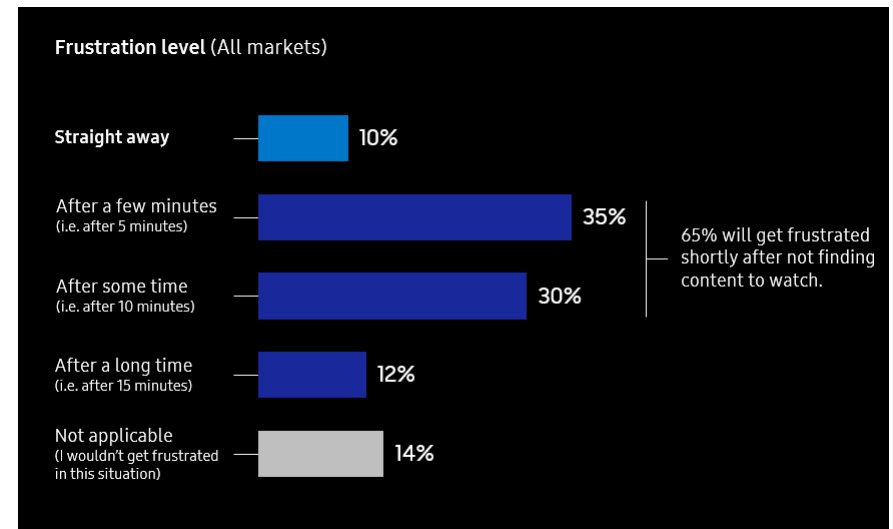
Source: Is TV Just TV? | May 2023

NAVIGATING THE FAST LANE

Marketers across APAC are taking note of the streaming surge and adjusting their media spend, according to Nielsen's 2023 Annual Marketing Report, with a third of advertisers relocating 40-59% of their budgets to CTV.

It's also becoming clear that the appetite for ads within streaming environments is changing. A recent study found brands that advertise on streaming platforms are perceived to be five times more modern and five times more innovative when compared to brands that advertise in non-streaming environments.

REACHING THE UNREACHABLES

While ad-supported TV continues to rise, there is a group of viewers who opt for

SAMSUNG Ads

32% Modern 6%
30% Innovative 6%
29% Relevant 8%
27% Premium 7%
27% Unique 7%

More ... than brands I see advertising on regular TV or cable / satellite channels

Less ... than brands I see advertising on regular TV or cable / satellite channels
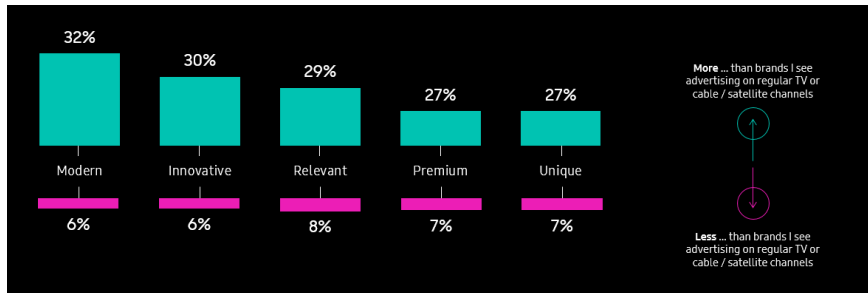
Source: Is TV Just TV? | UK, Spain, Germany, Australia | May 2023

ad-free environments. This group will likely continue to shrink, however there will always be a large portion of the audience that is "unreachable". One of the most effective means of doing that is through native ad solutions on Smart TVs. These are ad placements built into the Smart TV environment. They are the first thing the viewer sees when they turn on the TV and are specifically designed to grab the attention of viewers before they head into non ad-supported environments.

IS TV, JUST TV?

This new streaming first reality is creating an environment of complexity and fragmentation for advertisers to reach audiences. Consumers don't delineate by

format, and as the lines continue to blur between linear and streaming, we need to ask ourselves if it is time to ditch the acronyms. Is TV just TV? Our guidance is not to refine, but redefine your approach to a total TV strategy to reach both linear and streaming audiences.

In conclusion, while the last few years have been a time of unprecedented change, it's also a moment of unprecedented innovation with new ad-supported streaming & TV opportunities opening up new avenues for viewers, advertisers and content players alike. ∎

by Alex Spurzem
Managing Director, Samsung Ads ANZ & SEA

Samsung Ads *delivers Advanced TV advertising at scale. Our smart TV advertising solutions are built on a unique source of over 20 million Samsung Smart TVs across APAC. Samsung Ads provides the holistic view advertisers need, connecting linear, OTT, and gaming to help brands see the total advanced TV picture.*

JOHN FLANAGAN
MANAGING DIRECTOR, JAPAN AND SOUTHEAST ASIA

A+E
NETWORKS·

A PATH THROUGH DISRUPTION

As cord cutting continued to eat away at the business, in 2018, A+E Networks Japan launched a creative and media agency branded A+E Creative Partners to shore up declines in its core business and avoid becoming disrupted.

We made this horizontal pivot with confidence given our deep video production, media planning and marketing capabilities. And since its launch, A+E Creative Partners grew rapidly with a variety of client services that enabled us to grow both our top and bottom lines despite sagging affiliate revenues.

Although we created a new business line, we have not abandoned our roots. Affiliates still generate our largest revenues, and we remain dedicated to supporting our affiliate partners' needs while enhancing our linear channels offering.

From the start of the business as a pay channels service, storytelling has been the essence of our capabilities and the factor that differentiates us from the rest in our new line of business.

When Citizen Watch came to us to develop a 30ᵗʰ anniversary campaign for their PROMASTER brand, we did not propose the typical historic look back with black and white photos of staff tinkering away in factories. We proposed a campaign that would resonate with their customers who are outdoors people. People who enjoy scuba diving and mountain climbing among other activities. What they care about most is nature and the detrimental human impact on it. So, we contacted and featured 4 adventurists as Eco-Heroes, and what they are doing to improve the environment to create a multi-lingual campaign that Citizen Watch ran globally.

The Toro Company needed a way to link themselves and their golf course maintenance equipment to the 2020 Tokyo Olympics without being a sponsor. The A+E Creative Partners team created a video production that revealed the all-so-Japanese craftsmanship approach the greenkeeping team took at the 2020 Olympic Games golf course, Kasumigaseki, one of Japan's most prestigious. This short program was given exposure in golf media and at courses in Japan and North America.

And, we can work at scale. When the Tokyo government asked us to create a series of travelogues to attract inbound travelers to Tokyo and beyond in 5 key regions of Japan, the team divided up to visit hundreds of locations, creating a series of themed compelling social media-friendly productions.

On the media planning and buying front, our team has developed buying relationships with all key media including the notoriously difficult national TV networks in Japan.

A+E Creative Partners has become a full-service agency providing clients any marketing service they may require.

Now the second largest revenue stream for the company, A+E Creative Partners has begun to roll out across Asia leveraging existing A+E Networks' teams in Southeast Asia and Seoul with key clients. We are now open for business throughout Asia to provide customers innovative solutions with the intent of helping them through their own industry disruption and expanding their businesses. ∎

A+E Networks® is a global content company comprised of some of the most popular and culturally relevant brands including A&E®, Lifetime®, HISTORY®, Lifetime Movies, FYI™, VICELAND®, Blaze™ and Crime+Investigation®. A+E Networks' portfolio extends across platforms and genres, with a long-form production division, A+E Studios™; film division, A&E IndieFilms®; and A+E Digital®, encompassing watch apps, games and SVOD.

EUAN SMITH
GROUP CHIEF EXECUTIVE OFFICER, ASTRO

astro

LOCAL CONTENT AS DIFFERENTIATOR

As Malaysia's leading content producer, Astro strives to create premium content that captures the interest of the nation leveraging on our edgy storytelling, talent and high-quality production. Our TV viewership is underpinned by local content as our key differentiator, with our audience spending 77% of their watch time on local content. Astro currently spends 32%-35% of our television revenue on content and we'd like to direct more of that spend towards local.

We are reinventing our content proposition to meet the increasing demand for high quality local content on all screens. Our goal is to be 'Home' of the most watched content genres - original series, sports, kids, and movies. As Home of Originals, we are producing edgy Astro Originals including *Liar*, *One Cent Thief* and *Projek: High Council (PHC)* – our No.1 show On Demand which recorded a total reach of 2.8 million, 165 million minutes viewed On Demand and 76 million minutes viewed on Astro GO. PHC was a stand-out hit among young Malaysians, garnering over 1 billion views on TikTok and driving great on-ground engagement.

Astro is also the Home of Signatures – we constantly ideate new IPs to engage customers such as *Big Stage*, *Sepahtu Reunion* and *Real Men Malaysia*. *Gegar Vaganza Season 9* dominated viewing with 2.3 million peak ratings, 6.6 million reach and 37 million total digital views, making it Malaysia's No.1 show. Our new Signature, *Family Feud Malaysia*, adapted from the world's most popular game show and produced in three languages for our various audiences, garnered total reach of 4.0 million and peak rating of 514,000.

As Home of Movies and No.1 local film producer, we have a dominant 77% market share and produced four out of the top five local films in FY2023. Our blockbuster, *Polis Evo 3* grossed over RM54 million and became No.1 movie in Malaysia of 2023, beating all international titles. Our homegrown animation film, *Mechamato the Movie,* generated RM36 million in box office revenue, whilst patriotic action film, *Malbatt: Misi Bakara* and Malaysia's No.1 action-comedy film franchise, *Abang Long Fadil 3*, raked in RM34 million and RM25 million respectively at the box office.

As Home of Sports, we bring all the biggest premium global sporting events to our audience, as well as investing heavily in local sports to drive viewership and engagement. These include our own sports IPs like Netball Super League, which has recorded TV viewership of 3.5 million for its second season, and Sepak Takraw League, which garnered total viewership of 454k and 161 million minutes watched on sooka, our streaming platform, for its 9th season.

We are truly excited to be the official broadcaster for Liga Malaysia, Malaysia's own football league, from 2023 to 2025. The response from fans has been phenomenal on air and on ground; we have already recorded a TV audience of 7.6 million since the season's kick-off in February 2023.

Our standalone OTT app, sooka, is attracting a younger demographic to watch live sports on both mobile and Smart TVs. Last year, we introduced special 2022 World Cup passes that saw our paid customer base grow 57% during the period, including a 229% increase in sooka's big screen viewing. We are focused on building sooka as an alternate way to monetise content, recently adding fifteen FAST channels, offering both free and paid content.

Astro is also the Home of Kids, with over 16,000 Kids On Demand titles and 10 linear channels. These include our own Astro Ceria, the No.1 kids channel in Malaysia. Our kids and learning genres are driving On Demand engagement with 1.3 billion minutes viewed on the set top box, 32 million minutes viewed

on Astro GO and over 100 million shows streamed, underpinned by local and international IPs including *Didi & Friends*, *Upin & Ipin*, *New Doraemon* and *Cocomelon*. Children recently welcomed more new local IPs including *The Chosen One*, *Super Nabil*, *Kidaverse Roblox Rumble Malaysia* and *Didi & Friends Kembara Muzikal*. As a responsible broadcaster, we offer a Kids Friendly feature, providing a protected, enjoyable space for children to discover and indulge in their favourite programmes while giving parents peace of mind.

Piracy poses the biggest threat to the entire content industry. At Astro, we spend heavily on anti-piracy and continue to take strong technical and legal action against commercial establishments and illegal TV Box sellers, as well as individuals who are involved in copyright infringement. For us to continue investing in local content, it is vital that we and the authorities work together to combat piracy, safeguarding the interest of Malaysia's content industry and our paying subscribers. ∎

Astro Malaysia Holdings Berhad (Astro) *is Malaysia's leading content and entertainment company, serving 5.4 million homes or 68% of Malaysian TV households, 8,500 enterprises and 17.9 million weekly listeners across its TV, radio and digital platforms.*

NICK PERCY
PRESIDENT, GLOBAL MARKETS, BBC STUDIOS

B B C
STUDIOS

RIDING THE STORM

It's been called the perfect storm. After a decade of growth for the global streamers and record post-pandemic spend on content, the global SVODs are now experiencing some volatility and the effects are rippling through the industry. Slowing subscriber take-up, increased focus on profitability and therefore cutting costs, and the recent writers-actors strike action contribute to a particularly uncertain and challenging time. This is affecting content producers and distributors across the world as the US-based streamers have been such drivers of the global content market in recent years.

While we of course feel these challenges along with our peers, BBC Studios is fortunate to be able to draw on our diversified global business and experience. As the landscape evolves, I believe Asia has the opportunity to benefit from the after-effects of this storm.

THE RISE OF ASIAN CONTENT

Firstly, Asian content is where it is at right now. An MPA study on 'The Rise of Asian Content' reported that regional content drives 75% of viewing by premium video

users in Asia and it's clearly winning an audience globally. Netflix's reported plans to spend US$2.5bn on Korean content over the next four years and US$1.9bn on content across Asia Pacific in this year alone demonstrate that. This is good news for producers of local content and good news for the eco-system more broadly. We can see opportunities for experimentation and investment, and more scope for co-productions and co-development, which can create new Asian content and take it to the world. Shared values and high storytelling standards make Asia an attractive market to us at BBC Studios and we are certainly keen to find like-minded partners to work with.

THE RELEVANCE OF LINEAR

Secondly, Asia's linear and local streaming offerings continue to strengthen. According to the MPA study 'SEA Online Video Consumer Highlights and Analytics', there were 11.8m new paid subscribers last year, taking the total to 48.4m. Linear in Asia is not declining at the same rate as the U.S. and, in fact, outside of the U.S., the pay TV subscriptions number has grown by 5m versus pre-covid level and is expected to remain resilient

over the next few years. This year, BBC Studios has launched channels with new partners, including BBC Player as a video-on-demand streaming service on Amazon Prime Channels in India and MyVideo in Taiwan. While some global players are pulling their linear channels out of Asia for broader strategic reasons, we see an appetite for curated content offerings. Even the global streamers need pay TV platforms for distribution and aggregation will remain a feature of our markets.

A HOME TO INNOVATION

Thirdly, Asia has always been a home to innovation. It has had a remarkable digital rise and, according to McKinsey, is home to around 40% of global unicorns. Our BBC Studios team in Asia seeks to join this flow of innovation, from pioneering BBC Player as an authenticated streaming service for affiliates which is now also available in territories in Europe, to investing in our consumer products offer, striking new deals for our globally popular *Bluey*, *Hey Duggee* and BBC Earth brands in Southeast Asia and South Korea. Innovating around our BBC News offer for both linear and digital is a priority, creating a new BBC News channel for global audiences and investing in BBC.com for a richer online experience.

BBC STUDIOS

None of this ignores the fact that we have very real challenges facing the industry and they differ from market to market. To reiterate a point I made last year, forming partnerships that can combine regional and global expertise are key to our success. This market has the opportunities - we need to be strategic about how we work together to advance them. ∎

BBC Studios *is the BBC's global content company. Able to take an idea seamlessly from thought to screen and beyond, the business is built on two operating areas: the global Content Studio, which produces, invests and distributes content globally, and Channels & Streaming, with BBC branded channels, services, digital news platform BBC.com and joint ventures in the UK and internationally.*

BBC STUDIOS
The Best of British Creativity

BBC NEWS   BBC EARTH   BBC FIRST   BBC lifestyle   CBeebies BBC   BBC PLAYER
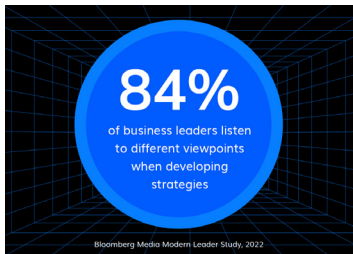
SUNITA RAJAN
MANAGING DIRECTOR, MEDIA SALES, APAC, BLOOMBERG MEDIA
Bloomberg Media

THE POWER OF INSIGHT IN A CHANGING WORLD

Modern business leaders face a crisis of confidence. Their roles demand a deep understanding of business, a firm grip on the economy, a strong commitment to equality, and prompt action on sustainability. When making decisions, they must constantly ask themselves: How will this impact the environment? What does this mean for society? And is this the right choice for my business and the people who power it?

84%
of business leaders listen to different viewpoints when developing strategies

Bloomberg Media Modern Leader Study, 2022

Making those decisions requires insights and guidance from a trusted source of truth that understands what moves business in our ever-changing world. Our research shows that 84% of business leaders listen to different viewpoints when developing their strategy. Many lean into Bloomberg for context because context changes everything.

Increasingly starved for time, business leaders seek context across multiple channels that suit their busy lifestyle – especially video. It is with that in mind that we continue to invest in new media platforms, advertising solutions, and data technologies. Our expansion into global streaming, represented by Bloomberg TV+ and Bloomberg Originals, enables us to better meet their needs. It has also allowed us to reach new, younger, and more diverse audiences – the next generation of leaders who promise to shape the future.

Regardless of generation, business leaders want to be enlightened and inspired. In February 2023, we launched talent-led docu-style programming called Bloomberg Originals to engage them in an exciting new way. The programs focus on five defining pillars of our time: Climate (*Getting Warmer with Kal Penn*), Tech and Innovation (*The Future with Hannah Fry*), Leadership (*The Circuit with Emily Chang*), Sports and Culture (*Power Players with Jason Kelly*) and ESG and Exploration (*Optimist's Guide to the Planet with Nikolaj Coster-Waldau*).

Much like we help our audience understand the world, we help our clients understand our audience. Our AI-powered tools offer insights into what matters to
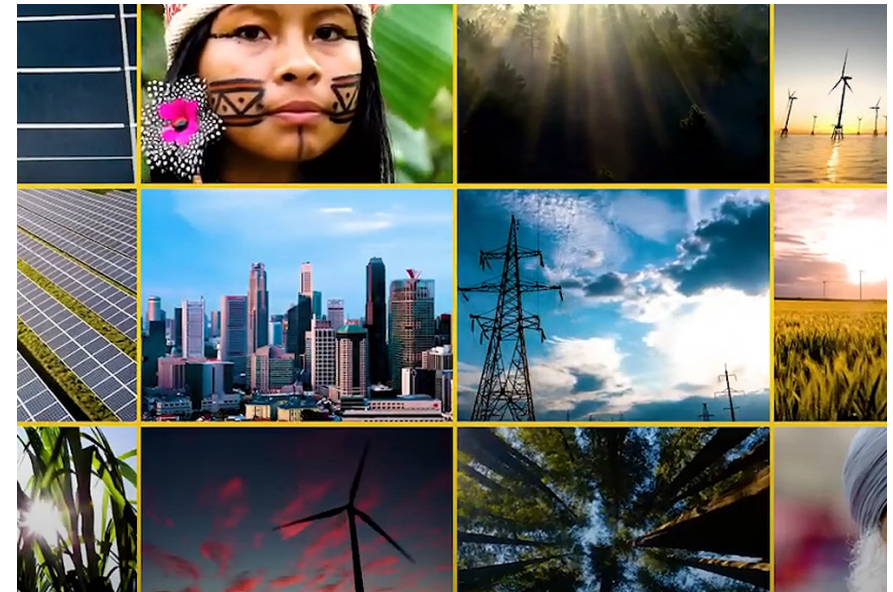
C-suites, financial advisors, and other audience segments, positioning us to connect with them about what they value most. When we appeal to their interests and speak to their hearts, they listen.

Who would have thought that the audience segment intent on foreign direct investment (FDI) is 3.5x more likely than the average Bloomberg audience to engage in content focused on gender equality? An insight like this can introduce an important social layer to FDI campaigns, which typically focus on infrastructure, talent, resources, and political stability. Turning insights into action allows us to help our clients cut through the increasingly crowded content landscape and connect with the most influential audience in the world.

Whether we are crafting editorial stories across Bloomberg's expansive ecosystem, or building commercial platforms that empower our clients to make a lasting impression on our audience, data-driven storytelling sits at the heart of what we do. Sometimes the data helps us decide how best to tell those stories. Other times the data helps our audience of business leaders make important decisions. Every time it empowers us to act with purpose, pragmatism, and precision. ∎

Bloomberg Media is the world's leading multi-platform media company for business and finance, which draws on the editorial resources of more than 2,700 editorial professionals globally in more than 120 countries. Bloomberg Media is the consumer-facing media organization of Bloomberg L.P.

GREG ARMSHAW
SENIOR DIRECTOR OF STRATEGY, ASIA PACIFIC, BRIGHTCOVE

BRIGHTCOVE®

OPTIMISING YOUR CONTENT FOR AUDIENCE ENGAGEMENT & REVENUE GROWTH

Many in the TV and film industry became alarmed about the prediction that only US$26.5 billion will be spent on new, quality TV content in 2023, according to Ampere Analysis. But is that really cause for concern? Let's take a look at Rewind Networks. They built a whole business promoting content that, in many cases, is considered "decades old." You also have Netflix, who reportedly paid US$80+ million to retain the "*Friends*" series in their catalogue for a year, even though it had been 15 years since the last episode was filmed.

While new content can be newsworthy and create temporary buzz, sometimes viewers are far more nuanced (and nostalgic) in what they may want to watch and find entertaining. So, even with a catalogue that isn't full of shiny new content, it is possible to generate revenue if you have the right

data, audience insights and marketing tools to fuel your streaming strategy.


SVOD STREAMER - CASE STUDY
Brightcove worked with a major SVOD streaming company recently to help them dive into their subscriber data to surface patterns and analyse their user behaviours to plot the best strategy to keep them engaged and gauge their reactions. Working in collaboration with our partner, we compiled the user data and focused on breaking down subscribers into different segments based on their historical user behaviour. From there, the streaming company was able to customise their marketing messaging to the different segments of customers.

FINDINGS & ACTIONS
We broke down genre viewing behaviour and its impact on the Lifetime Value (LTV) of their subscribers. At first, we found customers who watched multiple genres

were, in general, more likely to continue subscribing to the service for longer periods of time. When we peeled that back, we discovered that there were actually two segments of customers within that cohort. There were people who would stay for long periods of time and truly watched multiple genres, and there was also an equally large number of customers who watched mystery/thriller content almost exclusively but would dabble across genres in between the major show releases.
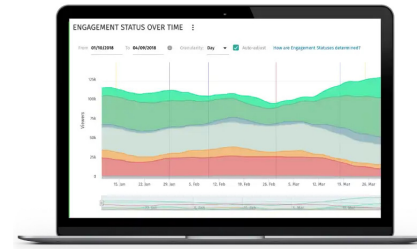
WHY THIS IS IMPORTANT
Understanding your audience insights is crucial to help you shape your video content and streaming business strategy. Once you have the proper data, you can hone in on the following two elements:

1) Messaging: It is key to adapt your marketing messaging to the user behaviour resulting from the content they are consuming.
   a) Multiple Genre - A broad range of content, celebrating the diversity of various genres.

   b) Single Genre - A focus on "hidden gems" proven to be engaging to that segment, with intrinsic messaging from the mystery/ thriller genre.

2) Content Buying: Understanding the type of content your viewers demand and comparing it to your current programming slate will help you equip the content teams with the right data to ensure they are licensing the proper amount of content for various genres to keep these users engaged for the long term.

MARKETING TECHNOLOGY
There are many methods to market your programming with your audiences, from simple email or SMS systems to app-based customer engagement platforms that facilitate personalised communications with your customer base. Data platforms like Brightcove Audience Insights ship the contact information to these platforms, many of which can be automated.

KEY TAKEAWAY
Consumers are open to varying entertainment options but fall into different viewing profiles. It's key to perform the right research and take an analytics-backed approach to your strategy so your organisation can communicate with them in a more personalised way to encourage them to stay or come back to your streaming service based on their preferences. ∎

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. In more than 60 countries, Brightcove's intelligent video platform enables businesses to sell to customers more effectively, media leaders to stream and monetise content more reliably, and every organization to communicate with team members more powerfully.

GEORGE CHIEN

CO-FOUNDER, PRESIDENT & CEO, KC GLOBAL MEDIA

KC GLOBAL MEDIA
ASIA

WE LOVE WHAT WE DO, AND WE DO WHAT WE LOVE!

The role of entertainment is about touching people's lives. Be it Hollywood drama, blockbusters, Korean drama, Japanese anime, or variety, sharing compelling stories through its characters are what connects audiences with us. Regardless of platforms or formats, KC Global Media continues to evolve and be part of the media ecosystem. We're not fighting the changes in the industry but working within it and setting the standards.

SETTING THE MARK FOR ENGLISH GENERAL ENTERTAINMENT

With its unique personality and DNA, AXN continues to be a dynamic brand and market leader in the English general entertainment space across the region. We love what we do and will continue setting the standard for this, like we've done over the years. Featuring the latest seasons of procedural dramas, action series and reality shows, our strong lineup resonates with our audiences, and this reflects positive growth in prime-time ratings in various markets. Overall, we have managed to increase viewers' stickiness through strategic programming and giving AXN viewers what they want to watch. But more importantly, providing what they would tune in and follow faithfully, to make AXN their destination channel.

BRINGING ANIME FEVER AND MANGA POP CULTURE BACK TO WHERE IT BELONGS

Anime has grown significantly among younger audiences, and we have witnessed widespread popularity across the region. The size and scalability of the genre will continue to rise driven by the passion of its fans. We know this because we've shared a strong connection with our fans over the years across social media, on ground and live events. When we launched our Japanese anime and entertainment channels, Animax and GEM, in India this year, everyone wanted a piece of us. Animax has grown not just as a channel but an anime lifestyle destination for our fans.

There was never a better time to bring our channels back to where they belong as we partnered with the biggest streaming platforms in JioTV and Amazon Prime Video, making Japanese entertainment more accessible to everyone in the nation. And not just limited to India, we also launched Animax in Sri Lanka through Dialog TV, where subscribers can enjoy an exciting array of anime content via subscription on-demand (SVOD), meeting the needs of the vibrant anime community there. The relevance of Animax as a pioneering anime channel will continue to

fuel the anime movement as we grow the genre and continue listening to our fans to create a space to celebrate their love for anime, like we've done numerous times this year around Asia. Connecting with fans is what we do best, and the future looks an exciting one, as we continue driving more engagement through collaborations with event partners and fresh plans for the coming year.

UP THE ANTE FOR KOREAN CONTENT

The popularity of Korean content continues to rise and whet consumers' appetite around the world. This year, we enhanced our content offering by partnering with one of the biggest studios in Korea in Munhwa Broadcasting Corporation (MBC) to bring more to ONE viewers. By onboarding more premium dramas and varieties on ONE, viewers enjoy double the entertainment across multiple genres, including drama PPALI-PPALI express titles within 24 hours from Korea, and variety express within a week from Korea.

MORE ENTERTAINMENT WHENEVER, WHEREVER

Closer to Southeast Asia, we've brought the best of Korean entertainment by launching ONE on Indonesia's biggest streaming platform, MAXStream. Viewers

can enjoy more along with their current access to English GE channel, AXN and Japanese drama and variety channel, GEM. In Malaysia, viewers can now gain access to the ultimate Japanese anime and entertainment experience through Animax and GEM, available across their mobile devices through Tonton, the country's largest streaming platform.

CHAMPIONING ASIAN ORIGINALS TO THE WORLD

Reinforcing KC Global Media's vision in creating a new standard of entertainment, we ventured into scripted original productions. Bringing the best local and international creators together, KC Global Media crafted a special project, garnering interest from Singapore's Infocomm Media Development Authority (IMDA) to working with us.

Fallen 8, a new folklore fantasy original series, brings to life the mystical Asian classic of the Eight Immortals, and provides a contemporary take on the Chinese mythology classic about a group of celestial beings who have "fallen" to the present day to be tested on their worth. Through their adventures, each reveals their divine power for a common goal. Along with A-list Hollywood talent, co-creator, screenwriter, producer, and actor, Meiling Melançon, we also brought multi award-winning

animation studio, Robot Playground Media, to work on the show's development.

Seeking to champion more Asian originals onto the world stage, another project in the works is *Jonesy*, an eight-part sci-fi comedy series featuring the main protagonist and his imaginary friend traversing a world ravaged by violent weather systems and monsters. The project is a shared collaboration between KC Global Media and the award-winning production studio, Monochromatic Pictures.

LAUNCH OF FAST CHANNEL

As the popularity of connected TV (CTV) streaming content in Asia continues to grow, consumers have a broader range of content and pricing options, including free ad-supported television (FAST) content. FAST audiences are drawn by different content, including international and unique interest genres that often cannot be found elsewhere. In November, KC Global Media launched KCM, our first FAST channel across major streaming platforms in India. The new channel offers factual entertainment, drama, and movies in English, and is the fifth brand from our portfolio of channels.

At the end of the day, economics drives our business, and we take the lead in going wherever is viable and sometimes in the opposite direction where everyone is heading. Whether it's acquiring content from studios around the world or developing content with the best creators, we bring what matters to those who matter (our fans).

Entertainment... That's Why We Love It! ∎

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 GE.*

BEATRICE LEE
CEO, ROCK ENTERTAINMENT HOLDINGS

ROCK entertainment

NAVIGATING THE DIGITAL AGE

The advent of the digital age has brought about a transformative shift in the media and entertainment landscape, fundamentally altering the way content is created, distributed, and consumed. Linear channels, once the primary means of delivering content to audiences, are now navigating a landscape where streaming platforms, social media, and personalised content experiences hold sway. At Rock Entertainment, we are trying to adopt to these changes while maintaining our unique value propositions.

We believe the shift to digital platforms presents an opportunity to diversify content offerings and engage with our audiences in new ways. We have embraced digital platforms as an extension of our brands, by investing in our online presence through websites, apps and social media channels, offering on-demand access to our content alongside scheduled programming. This hybrid approach allows us to cater to both traditional viewers who prefer linear broadcasting and the digitally inclined audience seeking convenience and flexibility.

Further, we highlight the importance of quality over quantity. While digital platforms offer vast libraries of content, we differentiate ourselves by focusing on carefully curated programming that aligns with our target demographic. This approach allows for a more tailored viewer experience and can be particularly effective in niche markets where audiences are seeking specialised content that speaks directly to their interests.

In conclusion, we have been navigating the digital age by embracing a combination of adaptation, innovation, collaboration, and data-driven decision-making. As viewers continue to embrace digital platforms, Rock Entertainment is evolving into a hybrid entity that caters to a diverse audience with varying consumption habits. By leveraging digital tools, diversifying content, and fostering partnerships, we are transforming our operations to not only survive but also thrive in an era of digital disruption. As we continue to reinvent ourselves, our linear channel business demonstrates its resilience and commitment to remaining relevant in a rapidly changing media landscape. ■

Rock Entertainment Holdings distributes content via Linear pay TV channels, branded and unbranded VOD, and FAST platforms across the globe. We have a multi-genre catalogue containing over 2,000 hours of content including natural history, documentary, lifestyles, movies and entertainment, short-form digital and pre-school kids programming. Rock Entertainment's channel business offers a portfolio of Media brands. Visit www.rockentertainment.com for more information about Rock Entertainment holdings.

MONIKA RUDIJONO
MANAGING DIRECTOR

Vidio

GROWING A #1 LOCAL VIDEO STREAMING SERVICE

Founded in 2014, Vidio has had an extraordinary journey as Indonesia's very own Over-the-Top (OTT) platform, with a selection of content tailored exactly for the Indonesian mass audience.

As the first local OTT, Vidio has an inherent understanding of the market and curates the best content for Indonesian viewers. Vidio is affiliated with over 58 TV channels (local and international) and 37 radio stations, making it the most extensive streaming service, dedicated to giving its users the best and most accessible route to digital content, regardless of their location or device.

Born from the vibrant spirit of Indonesia, Vidio proudly stands as the first Indonesian-made OTT platform. From captivating series to adrenaline-pumping sports, Vidio brings the best of local and international content, from Vidio Original Series, to cartoons and documentaries. This year, Vidio is making waves with the introduction of local drama "*Lara Ati 2*", which, within the span of 3 months, gained more than 10 million views. The production brings forth content with a strong local flavor, showcasing favourite

culinary locations within the city of Surabaya, East Java, while presenting authentic dialogues and humour emphasized by distinctive accents of the Javanese language.

Vidio, the 'Home of Local Content', is also actively producing Vidio Original Series, adapted from best-selling novels and movies, to Wattpad and even original stories. Over the course of the year, up to October 2023, Vidio released 29 Vidio Original Productions, featuring a lineup of top-tier Indonesian artists such as Wulan Guritno, Laura Basuki, Jefri Nichol, Mawar De Jongh, Amanda Rawles, Ahmad Al Ghazali, and many more distinguished casts.

Having won various awards, Vidio's series has also received international recognition from ContentAsia. These awards include the Best Supporting Actor in a TV Programme/Series Made in Asia, Ganindra Bimo as *Reno* for the series *Serigala Terakhir 2*, Best Director in a Scripted TV Programme, Siddhartha Tata for directing *Pertaruhan the Series*, and Best Sound Design for an Asian TV Programme/Series for *Katarsis*.

VIDIO AS HOME OF SPORTS
Offering more than the best quality of local original content, Vidio is also fully committed to airing a variety of local and international sports tournaments with the most comprehensive categories and the best quality, which earned Vidio the title of 'Home of Sports'.

Vidio's success in broadcasting the Asian Games in 2018 and the Olympic Championships in 2020 paved the way for another milestone. Vidio became the

exclusive official broadcaster platform for a series of highly anticipated sports tournaments, including the FIFA World Cup Qatar 2022, English Premier League, UEFA Champion League, La Liga, NBA, BRI Liga 1, and the FIFA World Cup U-17 2023, hosting 52 matches.

The broadcast of FIFA World Cup Qatar in 2022, the world's biggest sports event, posed a unique challenge for Vidio. Watched by more than 30 million viewers and viewed more than 262 million times

on the app simultaneously, it showcased the challenging scale of viewership that Vidio successfully managed to navigate.

Vidio doesn't just keep up with the times; it sets the pace. Our platform is powered by cutting-edge technology, delivering seamless streaming experiences across devices. With Vidio, you're doing more than just watching; you're immersed in a world where every pixel and every sound is designed to captivate.

Vidio is optimistic about becoming the best video streaming platform in Indonesia and remains the top choice for Indonesian viewers, while continually growing its subscriber base, focusing on both quantity and quality. ∎

Vidio
INDONESIA'S #1 CHOICE
FOR VIDEO STREAMING SERVICE

#1 OTT Platform in Indonesia
by Monthly Active User
(MPA, Q2 2023)

The Best Supporting Actor
In a TV Programme/Series Made in Asia, Ganindra Bimo as Reno for the series Serigala Terakhir 2
(Content Asia Awards 2021)

The 10 Most Innovative Asia-Pacific Companies of 2023
(Fast Company, 2023)

The Most Watched Sports Content in Indonesia for BRI Liga 1
(AMPD, June 2023)

The Most Watched Original Content in Indonesia for Open BO
(AMPD, June 2023)

Certified as The Great Place to Work in 2023-2024
(Great Place to Work Institute, 2023)

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ASIA VIDEO INDUSTRY ASSOCIATION

TELEVISION AUDIENCE MEASUREMENT 2023-2024

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)	n.a	Phnom Penh, Kapongcham & Battambang			Yes	Yes	No	n.a	Yes	No	Yes	No	Instar Analytics
CHINA	CSM	35,800	National panel: 500,000 Smart TV Device & 52 City panel: 200,000 Smart TV Device	90 city meter panels, 23 provincial meter panels, 8 diary city panels, 2 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	Infosys+
INDIA	BARC India	57,000* *Household Panel – 55,000 / Out-of-Home (OOH) – 2,500	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	11 Cities 3218 HH: 2,578 (Terrestrial) 640 (pay TV) National Urban 5800 HH: 4,610 (Terrestrial) 1190 (Non-Terrestrial)	2,000 panel for Firstmedia - exclusive	11 major cities, National Urban (Exclude Papua & Maluku)			Yes	Yes	Yes, in Digital Ad Ratings (DAR) & Total Ad Ratings (TAR)	Yes (Streaming Content Rating) 3700 Indvidual Panel 11 Cities From TV Panel, using Android base Smartphone, Age 10+	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 2023-2024

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	No	No	No	No	Yes	No	Arianna
	Kantar Media	18,000 homes expanded DTAM panel via fusion		National	Yes (Astro pay TV)	No	Yes (Astro GO)	Yes (Astro GO)	Yes (all channels)	Yes (all channels)	Yes	Yes	Instar Analytics for Traditional Ads (Linear) & AxM for Addressable+Traditional Ads (Linear+VOD)
MYANMAR	Nielsen Media Myanmar	1,320+ 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	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)	Yes (Streaming Content Ratings) 3000 individuals, subset for mobile from TV Panel. National Urban. Using Android base Smartphone, Age 13+	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 Media	National Panel: 1,900 homes	No	National (Urban + Rural)	Yes (Atria Pro)	Yes	No	No	Yes (selected channels)	Yes (selected channels)	Yes	No	Instar Analytics

TELEVISION AUDIENCE MEASUREMENT 2023-2024

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
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
	Nielsen for StarHub SmarTAM	-	Panel: 5,000 homes Census: 128,000 homes	StarHub TV Subscriber base	Yes	No	No	Yes for VOD	Yes in eTAM	Yes in eTAM	Yes	Yes	Arianna/ eTAM
SOUTH KOREA	Nielsen	4,144	No	National	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Partly yes (10 main channels, only for KBS)	Arianna
	TNMS (Kantar licensed)	3,200	10000 KT STB Data + Owned pnnel	National	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes (VOD+7days)	Infosys
TAIWAN	Nielsen	2,000 HH 6,900-7,000 Individuals	-	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	4,032 homes	n.a.	Nationwide 6 economic regions 4 cities	Yes	Yes	No	OTT - linear TV	Yes	Yes	Yes	n.a.	Instar Analytics

SYNDICATED MEDIA SURVEYS 2023-2024

MARKETS	RESEARCH COMPANY	SURVEY	SAMPLE SIZE	PANEL COVERAGE			METHODOLOGY	DEMOGRAPHICS	CAB/SAT MEASURED	DTT	SOFTWARE	REACH & FREQUENCY
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/Social Media All survey completed Online	15+	Fused with TAM data	Fused with TAM data	Clear Decisions	Yes
INDONESIA 11 cities & National Urban (Exc Papua Maluku)	Nielsen	Consumer & Media View	17,000+ ; 30,000+	Indonesia, 11 cities & Indonesia National Urban Exclude Papua & Maluku			Recruited: 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	3,600	East Malaysia [Sabah - Kota Kinabalu, Sandakan, Tawau & Sarawak - Kuching, Miri, Sibu]			Face-to-face	15+	Yes	Yes	Clear Decisions	Yes
MYANMAR	Nielsen Media Myanmar	Consumer & Media View	4,600+	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
VIETNAM	Kantar Media	National Media Habit Survey	6,405	Nation wide			Face-to-Face interviewing with structured questionnaire	15 - 54	Yes	Yes	Choices	Yes
		4 Cities Media Habits and Product Consumption Survey	8,520	4 cities: Hanoi, Danang, HCMC and Can Tho			Face-to-Face interviewing with structured questionnaire	15 - 54	Yes	Yes	Choices	Yes
CHINA	Sinomonitor	CMMS/H3/MMMS - TGI	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 2023-2024

MARKETS	RESEARCH COMPANY	SURVEY	SAMPLE SIZE	PANEL COVERAGE		METHODOLOGY	DEMOGRAPHICS	CAB/SAT MEASURED	DTT	SOFTWARE	REACH & FREQUENCY
11 ASIA MARKETS	Kantar Media	TGI Global Quick View	85,000	Australia, China, Hong Kong, India, Indonesia, Japan, Phillipines, Singapore, South Korea, Thailand, Taiwan		Online	16+	Yes	Yes	Choices Online	Yes
	Ipsos	Affluent Asia	20,283	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	371,010 (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 2023-2024

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.	Measurement of static content on tableau online
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 8,000 Smartphone	PC + Smartphone (Android & iOS)	Panel only Measurement for audiences. Audio matching with TV Reference(only for N-Screen)			Reach, Install, Time spent, Pageview, Session TV program viewership via PC & mobile(only for N-Screen)	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 2023-2024

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 - ~19,000 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 - National Urban 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, Undupli-cated 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, Undupli-cated 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, Undupli-cated 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, Undupli-cated 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 propertie s & 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, Undupli-cated 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 2023-2024

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
INDIA INDONESIA 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 2023-2024

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	n.a.	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	n.a.	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 2023-2024

MARKETS	RESEARCH COMPANY	SIZE OF PANEL	PLATFORM COVERAGE	METHODOLOGY		CORE REPORTING METRICS	DEMOGRAPHICS	AUDIENCE SEGMENTATION (BEHAVIOUR)	MULTI-PLATFORM REPORTING	REPORTING	PLANNING TOOLS
AUSTRALIA HONG KONG JAPAN SINGAPORE TAIWAN VIETNAM	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, VideoStreams, Viewing Duration, Total Minutes	Campaign Reach/Frequency, Video Reach/Frequency
INDIA	Comscore	2 million-person global human panel and extensive Comscore census network	Desktop, Mobile (Smartphone and Tablet, Web and App) CTV (Device Level)	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) CTV (Device Level)	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
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.

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