

DECEMBER 2023

ASIA VIDEO PULSE

THE NEWSLETTER OF THE ASIA VIDEO INDUSTRY ASSOCIATION

*Happy
Holidays!*

2024 EVENTS

ASIA VIDEO SUMMIT

13 - 14 MARCH
HONG KONG

FUTURE OF VIDEO INDIA

25 APRIL
MUMBAI

ANOTHER YEAR OVER

It is always difficult to try to summarize everything that happened over the course of the year, but let me try to highlight a few points because there has been a huge amount of activity and a lot of positive developments.

First of all 2023 has seen Clare Bloomfield become our next Chief Policy Officer and with the hiring of Shahira Caffoor, we are back up to full strength in our critical policy function. This was amply demonstrated at the recent Policy Roundtable where we had an excellent half day of closed door conversations between member companies and regulators from around the region

Piracy continues to present huge challenges to our industry and while overall the problem is not going away, there are still a lot of positive developments to report on. The site blocking actions that CAP, headed by Matt Cheetham, undertakes on behalf of members is among the most important work that we do. Removing infringing websites and apps from the digital world is critical. We have continued to see progress in Indonesia and Malaysia, we continue to block sites in Singapore, we are seeing some blocking happening in Vietnam, and most excitingly we think we are on the verge of seeing new legislation in the Philippines that would for the first time allow blocking in that market. Combined with a revamped MagicCap piracy measurement portal which allows us to monitor and take action against pirate websites, we end 2023 in a very positive place.

2024 EVENTS

SATELLITE INDUSTRY FORUM

28 MAY
SINGAPORE

KOREA IN VIEW

3 SEPTEMBER
SEOUL

JAPAN IN VIEW

5 SEPTEMBER
TOKYO

VIETNAM IN VIEW

10 OCTOBER
HO CHI MINH

AVIA - PREMIUM VIDEO ADVERTISING COMMITTEE

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 engagement of premium OTT advertising across the globe, including Australia. Our latest report, 'The Premium OTT Advantage', provides a comprehensive overview of the advertising opportunity presented by premium long-form content in major, representative and emerging markets, and is available to our members under a non-exclusive license. The report is available to our members under a non-exclusive license. The report is available to our members under a non-exclusive license.

Most Disruptive Services

Offers Best Quality Content

AVIA THE AVIA VIDEO INDUSTRY REPORT 2024

Advocacy for the under-utilised opportunity that lies in advertising on premium streaming services has continued to be another big focus in 2023. As well as being a core topic in all of our events and conferences, we have held regular committee meetings

and produced three original pieces of research demonstrating how premium video services offer greater value to advertisers than social media or user generated platforms.

And 2023 saw a complete calendar of industry conferences all around the region and all in person for the first time since 2019. Mumbai, Taipei, Jakarta, Bangkok, Singapore and Hong Kong have all played host this year.

And what about the mood in the industry this year? Well I would be the first to admit that it has been challenging. We have seen costs being tightly controlled across the industry. This is understandable and indeed admirable because ultimately we all need to operate sustainable businesses. However this can create challenges, especially for an organisation such as AVIA, because we need our members to be able to set aside an amount of money for us to be able to operate and represent the industry. In retrospect and against all expectations, the COVID period was easier to manage than we had feared but equally where we expected things to bounce back post COVID, we have yet to see that fully happen.

So as we head into 2024 we are upbeat but also sober. Across the video industry it is important that common interests and initiatives that help everyone are able to continue. We work best when our members engage with us across all of the issues we collectively face. As I have said many times it is less about the work that the small team at AVIA does, and more about harnessing the collective skills, talent and input from all of our members so we may provide the forum to develop and protect our industry so that we can all thrive. We look forward to continuing to do this in 2024.

We have another full agenda next year and please do look at our event calendar in this newsletter or on our website. We hope to see as many of you as possible at those events next year.

In the meantime we hope that all of you are able to get some downtime over the holiday season, recharge and come back in the new year, fresh for what will be another exciting year of opportunity and challenge.

LOUIS BOSWELL

POLICY MATTERS

CLARE BLOOMFIELD

CHIEF POLICY OFFICER

As we approach the end of 2023 and our fourth policy update for the “Pulse”, I am amazed by how much has changed in such a short space of time. In 2023, the Policy team is completely revamped (albeit not all of us are new faces); we have returned to the pre-Covid hectic travel schedule and, it seems, every regulator we talk to is still trying to get their regulatory grips around the world of online content (not always in a helpful way). We’ve been kept busy on the submission side too, especially in India in the last quarter but have also been proactively engaged with the **Content Forum in Malaysia** supporting their development of a **Best Practice Note for Online Curated Content**, a self-governance framework, which will shortly be published by the Malaysian Communications and Multimedia Commission. Working with the Content Forum as well as Malaysian and global industry players to develop a voluntary framework for the industry to follow, was an example of an industry-led approach to creating something that supports the growth of the industry whilst also meeting the needs of regulators, in a light touch way.

REGIONAL UPDATES



In India the regulators have turned their focus towards reorganising the regulatory landscape through several consultations. Firstly, the Telecommunications Regulatory Authority of India (TRAI) issued a pre-consultation on a **National Broadcast Policy**, swiftly followed by the Ministry of Information and Communication (MIB) publishing a consultation on a **Broadcasting Services Bill**.

The MIB consultation aims at consolidating regulation for all broadcasting, including online, under the remit of the MIB; whilst also raising the issue of increased pre-certification for online content. TRAI’s pre-consultation posits a similar view, asking for input on the promotion of local content, issues concerning piracy and content security, convergence, specific regulatory authority for broadcasting, and audience measurement systems, amongst other things. Whilst both approaches raise the issue of some form of convergence, both also suggest increased regulation of online content and regulatory burdens, with the MIB consultation talking specifically about the creation of Content Evaluation Committees for all forms of broadcasting, including online, something which clearly moves away from the current self-regulatory approach.

We were lucky enough to have the opportunity to interview **Professor Pirongrong, NBTC Commissioner**, at the recent Thailand in View. She touched on NBTC issues, including developing production incentives in support of soft power and on consideration of a regulatory approach to online content.



In parallel, the Thai government also announced the formation of a new **Soft Power Committee** with the remit to find ways to develop Thailand's soft power, although the details of what that might mean are still being worked on.



Elsewhere in the region, Taiwan continues to discuss their plans for an **OTT TV Act**. Again the details are still being worked through but previous versions have included a requirement for online video platforms to register, as well as potentially include local content quotas. Their drive to bring in regulations apparently stems from a consumer survey which highlighted that 60% of Taiwan consumers wanted some form of regulation.

This data, along with a desire to put in place measures focused on consumer safety, especially in the **premium online video space**, ensure that AVIA needs to urgently engage with the **National Communications Commission (NCC)** who are leading the discussions in this space, although things may change post-election in January, 2024.

Whilst all of the above demonstrate specific regulatory approaches, they also show how common the issues across markets are. It is clear that, from a policy perspective, there remains much to be done to continue to promote our **Self Governance Framework** which we are currently revising and will re-launch in early 2024 with the aim to re-ignite the discussions across all markets.



Finally, earlier this month we hosted the **Policy Roundtable in Singapore**, our annual event bringing together regulators and senior industry members to discuss the current issues in the policy world. Amongst other issues, this year's discussions focused on **self-governance for the curated online content industry, good regulatory practices** and **production incentives**. It was a great opportunity to directly engage with a number of regulators, as well as share industry best practice and sets things up nicely for ongoing conversations in 2024.

2024

Calendar of Events:

ASIA VIDEO SUMMIT

HONG KONG

13-14
MAR

25
APR

FUTURE OF VIDEO - INDIA

MUMBAI

SATELLITE INDUSTRY FORUM

SINGAPORE

28
MAY

3
SEPT

KOREA IN VIEW *

SEOUL

*Date TBC

JAPAN IN VIEW *

TOKYO

*Date TBC

5
SEPT

10
OCT

VIETNAM IN VIEW

HO CHI MINH

PRT & OTT SUMMIT

SINGAPORE

2-3
DEC

**MORE
INFORMATION**

SPEAKING: Greg@avia.org
SPONSORSHIP: Adela@avia.org

MATTHEW CHEETHAM

GENERAL MANAGER

In 2007 I was involved in a raid on a major pirate distribution centre in Quiapo, Manila. There were four rights holder representatives on the raid, and we were accompanied by more than 200 fully armed local police and soldiers. The raid took more than three hours during which more than four million pirate DVDs were seized, piled high on eight trucks. By the end of the three hours, a considerable crowd had gathered, and ill feeling was riding high. We were told it was time to leave and as we did so we were surrounded in a cordon of soldiers for protection as the crowd hurled abuse at us. Site blocking is so much easier and cleaner for all involved and it won't be long before this measure is in place in the Philippines.

COLLABORATING

CAP's second major piracy event of 2023, the **Piracy Over the Top (POTT) Summit**, took place in Singapore in early December. The event was very well attended with over 70 registered delegates from both AVIA and CAP member companies, as well as from industry and government. A key speaker at POTT was **Google's Global IP and Content Regulation Public Policy Lead, Kate Sheerin**, who flew in from Washington DC for the event. **Itae Choi, Executive Director** of the Korean broadcasters' association, the **Korean Copyright Overseas Promotion Association (COA)**, also attended and spoke at the event, further deepening our relationship with them.



Louis Boswell, AVIA, with Kate Sheerin, Google



Matt Cheetham, AVIA CAP, with Itae Choi, COA

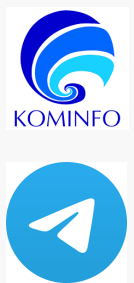
We continued to work with success with our various coalition partners throughout the region and the fruits of this work continue to be borne, particularly with **AVISI in Indonesia** and the **Video Coalition of the Philippines (VCP)**, who in their separate ways are greatly assisting with CAP's push for stronger copyright protection measures in their respective countries.

ENGAGING & OUTREACHING

In late November we received surprising and welcome news in the Philippines that the CAP co-authored **site blocking legislation** that was presented to the Senate after passing through Congress in May, was selected as a **priority bill** by the President. While there are no guarantees, we hope that this ensures the bill will pass in the first half of 2024. This follows a concerted effort by CAP, supported by the VCP and very much overseen and shepherded by Globe.

CAP's work with Google and Meta continued apace in Q4. As noted above, Google were well represented at our POTT Summit in Singapore, and we followed this up with a Roundtable later in December. In early December, CAP took advantage of the OTT and POTT Summits to hold an in-person Roundtable at Meta's offices in Singapore. A key takeaway from the meeting was Meta's push for CAP members to use their **new API tool**. We are liaising with Meta and a number of CAP members on getting this implemented for them.

In December, CAP also organised a meeting in Jakarta with the Indonesian telecommunications regulator, Kominfo, to discuss piracy on Telegram. **Kominfo** were as usual very engaged and said they have contacted **Telegram** and will be organising an online workshop in January to discuss the issues. CAP also met with the Intellectual Property Office (DGIPR) to discuss this issue with them.



ENFORCING & DISRUPTING

CAP's enforcement work continued with the two major platforms, Google and Meta. As noted above, we held Roundtables with both in Q4. A key point of discussion at the Google Roundtable was the **Yalla Project** under which CAP worked with a number of CAP members and non-members on a one-month project targeting the Yalla group of sites that to date appear relatively immune to TCRP takedowns. We provided Google with this report and are working with them on follow up action against the Yalla group of sites. In Q4 CAP also forwarded our first list of sites that had been blocked in Singapore for demotion/delisting from Google's search engine. We also continued to forward all blocked sites in the region to Facebook for removal from their various platforms.



In Q4 CAP released its first report following **a sweep of ISDs** being sold on e-commerce sites around the region. The top line summary of the report showed ebay.com.hk and shopee.co.id to be the most high-risk platforms, with EVPad as expected amongst the most popular ISDs being sold on the sites. We were very pleased with the wide variety of responses to the report. We intend undertaking the sweeps on a regular basis and the feedback will ensure we improve the report.

CAP's blocking program continued to pick up in Malaysia in Q4 with another **80 sites referred to the MDTCA for blocking**, on top of the 54 in Q3. The MDTCA are now much more responsive than previously, and we are pleased with the regularity with which we can now refer sites for blocking.

In Indonesia, we continued to work hand in hand with AVISI, with CAP now focusing on blocking IP address sites for AVISI, of which we referred **100 to Kominfo for blocking in Q4**. We also filed numerous sites on behalf of CAP members for the usual DNS blocking, and for the first time, filed sites via the Intellectual Property Office's (DGIPR) procedures. These were sites that had no gambling or pornography on them and therefore could not be blocked by Kominfo. While the DGIPR's procedures are much slower, there is strategic benefit in using them. CAP are also continuing to work with our members on filing a new application in Singapore, which we hope to have in place by early 2024.

RESEARCHING AND TECHNOLOGIZING

In Q4 CAP worked with White Bullet to refine its tracking of ad revenue on pirate sites in Asia-Pacific via the MagiCAP portal. We have identified a list of the 200-300 most popular pirate sites which we will update monthly and track. This data will be used for discussion with intermediaries and governments around the region.

CAP is also working on new research analysing the wider potential risks involved in ISDs being used for accessing pirate content in Taiwan. We aim to have this research finalised and released in early 2024. We also expect to have our 2024 YouGov Consumer research released in the same time frame.

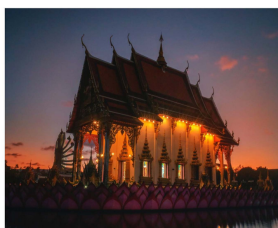
CONCLUDING

CAP ended a busy 2023 strongly with the POTT Summit, Meta and Google Roundtables, meetings with Kominfo and DGIPR in Indonesia, and the President's announcement of our Philippines site blocking bill as a priority bill. Happy holidays and we look forward to continuing to work with you all in 2024.



Thailand in View Report

avia
ADVANCED VIDEO INDUSTRY ASSOCIATION



**THAILAND
IN VIEW 2023**

Executive Summary

In conjunction with our Thailand in View conference, AVIA has commissioned the Thailand in View 2023 Report.

The Executive Summary is now available at our [Download Centre](#). Read on for an overview of the video industry in Thailand. In the Report, we will cover the Socioeconomic and Political Environment, Free To Air TV, Pay TV Telecoms and Online Video Markets as well as Advertising, Content Piracy and Regulations.

**The Thailand in View 2023 Executive Summary is accessible to AVIA Members only.
Kindly log in to your account for access.**



THE FUTURE OF THAI CONTENT SHINES BRIGHTLY WITH THAI SOFT POWER ENABLING IT TO TRAVEL THE WORLD

Over 150 industry leaders gathered in Bangkok for AVIA's **Thailand in View** conference, for a day of discussions centered around *the State of Video in Thailand, the Supremacy of Content and Boosting Advertising Revenue*, before closing off with a keynote address on *the Big Picture*.



Sompan Charumilinda, Executive Vice Chairman, True Visions Group



Left to Right:
Clare Bloomfield, AVIA with Commissioner Pirongrong Ramasoota, National Broadcasting and Telecommunications Commission (NBTC), Thailand

There was much optimism on the future of video and content, with many speakers agreeing that it was indeed Thailand's time on the world stage. Content was also a key focus for the streaming platforms, with many remaining upbeat on the success of Thai content with a global audience.



Louis Boswell with Surin Kittayaphongphun, BEC World

Pictured Right (L to R): Winradit (Win) Kolasastraseni, True Digital Group, Kanokporn-Jay Prachayaset, Tencent Thailand, Parnsuk (Poppy) Tongrob, iQiyi



Danny Chung, THEBLACKSEA

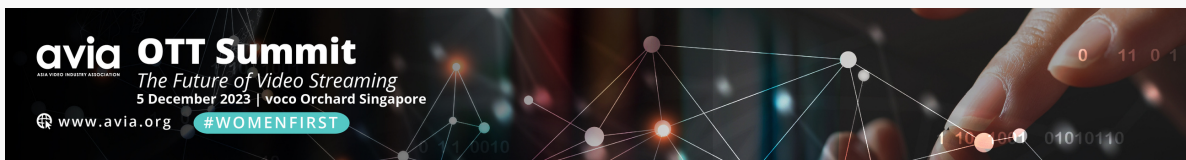
The topic of Thai soft power was also very much discussed on the role it played for the entertainment industry and for Thai content to travel the world, with soft power the weapon to bring more visitors in and showcase the country as well.



Closing off the conference with his view on the future of content was Group Chief Executive Officer of The One Enterprise, Takonkiet Viravan (pictured left). With the strong ecosystem that One Enterprise had as a content creator and distribution channel, coupled with the launch of their own OTT platform, OneD, Viravan remained cautiously optimistic for the future.

Click [here](#) for more details and photos from the conference.

PAST EVENTS



AVIA held its annual **OTT Summit** in Singapore on 5 December, where over 90% of the speakers were senior female executives from across the video industry in Asia Pacific. This year's summit was designed to try and redress the gender imbalance seen in many industry conferences.'

The Summit opened with Dhivya T, (pictured right), Lead Analyst, Head of Content & Platform Insights, Media Partners Asia, presenting an overview of the state of streaming in Asia, a market where competition was very much driven by a battle for share of time, with premium video on demand (VOD) fighting with social media and user-generated content (UGC).

Free Ad-Supported Streaming TV (FAST) was also much talked about at the Summit as the new kid on the block, as it mimicked the experience of linear TV, delivering scheduled content, with advertising included.

Conversations around marketing and monetization reigned in the afternoon sessions, where senior marketers and agency heads chimed in on the importance of brand building, as the mantra was no longer acquiring subscribers at all costs but focus on keeping the ones you have.



Top (L to R) Madoka Hull, Publica, Samantha Cooke, Samsung Ads APAC.



Right (L to R): Roberta Cambio, Chiyo Yanagita, Brightcove



L to R: Sophia Spinelli, BBC Studios, Anuja Trivedi, Shemaroo Ent.



L to R: Jason Barnes, PubMatic, Alex Lowes, Group M Nexus



L to R: Juliette Stead, Magnite, Chloe Neo, OMG, Anita Munro, GroupM



L to R: Min Lim Vision New Media, Nimisha Pandey, Zee5, Marianne Lee, Viu, Agnes Rozario, Astro

A strong focus on content closed off the Summit, where panelists from some of the region's largest platforms spoke of the importance of local content alongside the regional strategy. Ultimately story telling trumped investment, and a good story well told will always be universal in its appeal.



L to R: Vanita Kohli-Khandekar, Business Standard, Esther Nguyen, POPS Worldwide, Beverly McGarvey, Paramount ANZ

ASIA VIDEO SUMMIT

2024

13 -14 March | The Grand Hyatt Hong Kong

Asia is predicted to be the fastest growing and largest region for streaming ahead of Europe and North America, accounting for ~390M subscription streaming homes by the end of 2024. And with the global media streaming devices market anticipated to increase to ~128M units next year and growing at a compounded annual rate of ~15% since 2018, consumption of international content globally will undoubtedly grow as well.

What are the implications for the focus on this region, and how will it impact allocation of resources and investments? Is Asia ready and able to capitalize on this growth?



The State of Video

- Charting Asia's Evolving Video Landscape
- Making Streaming Sense and Growing FAST
- The Tenacity of Pay TV and The Big Bundle
- Piracy – Why it Matters



Content Everywhere

- Flat is the New Up
- Local Audiences First. Next, Conquering the World
- Sports, News and the Stream
- China Rising



Show Me The Money

- The Appeal of Evergreen Content
- Formats and Adaptations – Monetizing a Hit
- Premium Video – Getting a Bigger Share
- Building FAST Profitability and Tapping the Gaming Potential



Innovative Tech & Video Trends

- Opportunities and Perils of AI
- Generative AI Solutions in Video
- The Evolution of the TV Set

REGISTER NOW

Register before **31 Dec** with Promo Code "**AR330**" to enjoy the Advance Rate and save USD 330!

Friend MTS Joins AVIA to Intensify the Fight Against Piracy in the Region



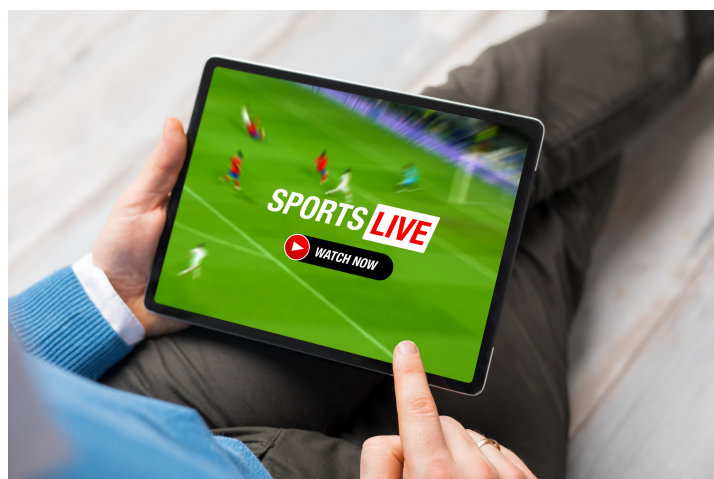
Though Asia Pacific presents many opportunities, it is also particularly challenging when it comes to piracy. In addition to globally popular content, there's an amazing diversity of content in a variety of languages across the countries and cultures. Then there's the young demographic that tend to primarily consume content on mobile devices and is somewhat averse to the idea of paying for it.

This leads to the challenges of a very fragmented market and certain viewer behaviours making it even harder for legitimate services to compete against pirates

In terms of effective IP enforcement, each of the different jurisdictions in the region requires a tailored approach underpinned by equally admissible evidence as well as a coordinated effort of a number of different stakeholders.

Leaning on two decades of successful content protection operations, including in some of the most challenging markets, Friend MTS ticks all the boxes by offering proven anti-piracy strategies. We provide a range of highly scalable and automated solutions such as content monitoring and enforcement, subscription- and distribution-level watermarking and Dynamic Server blocking, to protect our customers' revenues. As an innovative technology company, Friend MTS pioneered its dynamic blocking solution that has been disrupting illegal content redistribution for over a decade for our renowned customers.

"As the world leader in content security for live sports and events, we already protect some of the biggest brands in the Media and Entertainment industry," says Shane McCarthy, CEO at Friend MTS. "Our goal is to bring the class-leading tools and expertise trusted by our customers to every content creator, owner and distributor around the world."



Friend MTS currently has an impressive list of customers which includes Sky, the Premier League, UEFA, Warner Bros Discovery, BBC Studios, Serie A, WWE, Bell Canada and Rogers Sports & Media. The intention is to grow that list to soon add clients in APAC that will benefit from the company's reputable expertise. We all know that fighting piracy for our customers doesn't just mean monitoring, identifying and securing the content – it is also about converting those subscribers into legitimate views thereby growing the business.

MEMBERS' VIEWS

Joining AVIA is particularly timely as Friend MTS has recently opened brand new offices in Singapore as part of the company's continued commitment to grow and expand in APAC. Since the new ownership by North Edge following the investment in 2022, the company has been investing in all parts of the business, including Engineering and R&D which so far has grown by 20%, as well as increasing its footprint across the regions. This shows how much the company is committed to working with local broadcasters, OTT operators and rights holders to help protect their content and revenue and ultimately grow their business.

As industry partnerships and raising awareness within the wider community are key in combating illegal video redistribution, Friend MTS trusts that an institution like AVIA, with 25 years of knowledge and action in the field, will help develop strong links with various industry players such as internet service providers (ISPs) as well as policymakers and local enforcement institutions to tackle the issue of piracy.

"We are excited to join the impressive list of AVIA members. It is a great opportunity for Friend MTS to connect with the various streaming platforms, broadcasters and content owners and ultimately all industry stakeholders in the APAC region who want to make a difference in the video entertainment industry," says Fabien Gauthier, Vice President Sales APAC, Friend MTS. "We are also thrilled to offer these proven unique solutions in the APAC region and are looking forward to sharing more use cases as we spend more time with our partners at AVIA."



Fabien Gauthier
Vice President Sales
APAC

Friend MTS

Asia Video Industry Report 2024

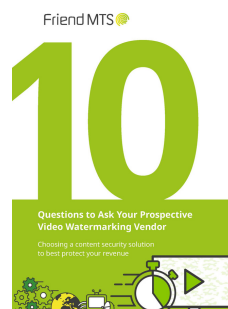
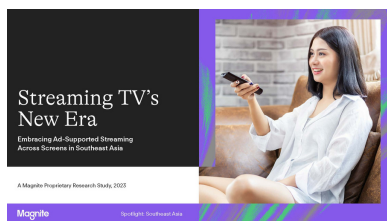


AVIA's annual **Asia Video Industry Report 2024** is now available for download. Read on for insights into Policy and Piracy around the region, the latest Research on video and streaming, and advancements in entertainment and distribution Technology. The report also covers the Advertising opportunity in premium video and perspectives on Content from brands and platforms across Asia.

The Asia Video Industry Report is available to all! Visit our [Download Centre](#) for more insights into the video industry in Asia.

Member Reports:

The following reports are now available at avia.org for download and are accessible to all. Please register for an account on our website for access to these and more.



New Members:

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

Friend MTS 

2024 Upcoming Events:

Asia Video Summit	13 - 14 March
Future of Video India	25 April
Satellite Industry Forum	28 May
Korea in View	3 September

Save The DATE

Contact Us:

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

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