

MARCH 2024

ASIA VIDEO PULSE

THE NEWSLETTER OF THE ASIA VIDEO INDUSTRY ASSOCIATION



2024 EVENTS

FUTURE OF VIDEO INDIA

25 APRIL
MUMBAI

SATELLITE INDUSTRY FORUM

28 MAY
SINGAPORE

The Advertising Challenge

Everyone is trying to do the same thing - drive revenue, while keeping costs at an optimal and sustainable level. Recent history tell us the former is becoming harder and there has been an unrelenting focus on the latter.

But when you look at the revenue options for the video industry, despite all the evolution, disruption and consolidation, revenue options remain largely constant - subscription or advertising.

While everyone wants subscription revenue to grow, advertising is the pain point for the industry. Free to air, terrestrial TV used to be the powerhouse of advertising. And for pay TV, advertising was an important secondary revenue stream, with both regional and local budgets to be tapped.

The growth of social media and user generated platforms has seen the advertising ecosystem turned upside down. The size of audiences aggregated on the platforms of Facebook, YouTube and TikTok unsurprisingly dwarf anything the streamers can offer. But Facebook, YouTube and TikTok have no content costs. Netflix, Disney and Viu invest billions.



Arguably, the story of pay TV in much of Asia was that there is an audience that will pay, but in many markets there is a larger audience that won't. Pay TV never had an option to address the audience that won't pay. Streaming does, as different providers develop their free and freemium ad supported services.

2024 EVENTS

KOREA IN VIEW

27 AUGUST
SEOUL

JAPAN IN VIEW

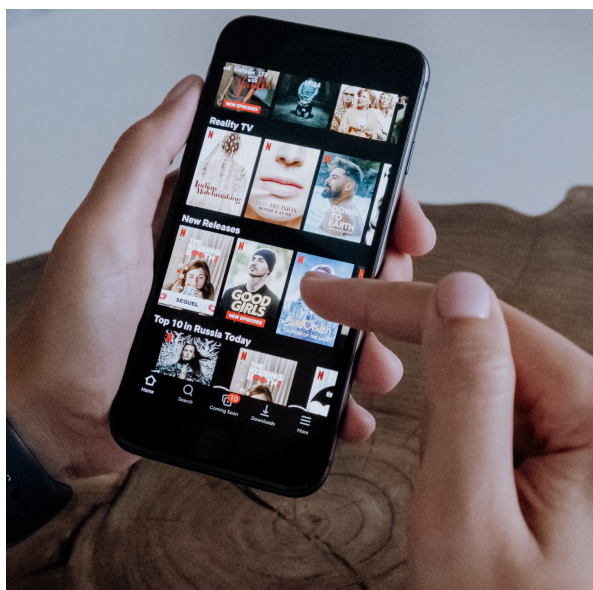
29 AUGUST
TOKYO

VIETNAM IN VIEW

10 OCTOBER
HO CHI MINH

But does any one player have the scale to tip the balance back? I would argue not. And as was highlighted by James Gibbons, President, Asia Pacific, of Warner Bros. Discovery at the recent Asia Video Summit, this is an issue the industry needs to come together to address.

There are no simple solutions, but the fundamentals remain that environment and content matter. The eyeballs may be the same, but the engagement and investment in a drama, a comedy or a sports show is fundamentally different to a short form piece of UGC. And scale matters, so can the ad supported services of streamers gain greater traction, and can streamers work together in some shape or form?



This last area is very much a focus of AVIA – encouraging joint discussions, commissioning research, and engaging the buy side to advocate for premium video. There is much sympathy and desire from brands and advertisers, but there is much work yet to be done by our industry. We encourage everyone who cares about the future of advertising in our industry to work with us on solving this thorniest of problems.

LOUIS BOSWELL

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

NEW DATE!

27
AUG

KOREA IN VIEW

SEOUL

JAPAN IN VIEW

NEW DATE!

TOKYO

29
AUG

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

POLICY MATTERS

CLARE BLOOMFIELD

CHIEF POLICY OFFICER

The beginning of 2024 has been an interesting time for the policy team as we welcome the year of the Dragon, a symbol of power, whilst at the same time anticipating potential changes resulting from recently held or upcoming elections taking place around the region. Since the start of the year, we have already been kept busy on a policy front with several submissions, including the annual **United States (U.S.) Trade Representative Special 301 Review** and of course, India's multiple ongoing and pending consultations.

On top of our own events, AVIA was also invited to participate in a panel at the **International Information and Communications (IIC) Asia Forum 2024** in KL. This was an opportunity to moderate a panel alongside a number of our members in a vibrant discussion titled "*Facilitating a Vibrant Cultural and Creative Economy – Radio, TV, Streaming, Gaming*". Our key messages emphasised the role digital creative industries play in driving socio-economic growth and job creation in the region. We were particularly pleased to share the stage with Content Forum who re-emphasised their **Best Practice Note for Online Curated Content**, a self-governance framework approach, which is something we are keen to promote to other regulators. Looking forward we hope to also participate in the IIC's annual conference in Bangkok later this year, enabling us to continue engaging regulators around the region through various forums.



Whilst last year we spent a fair amount of time looking at the issue of network usage as telecoms companies endeavoured to find ways to engage regulators on this topic, today a lot of the momentum on this issue has slowed and it has become less of a focus although it continues to remain on the horizon for a few of our markets (i.e. India, Taiwan).

Policy Calendar

Regulatory & Anti-Piracy Meeting

12 June

SINGAPORE

Policy Advisory Council

10 July

SINGAPORE

Policy Roundtable

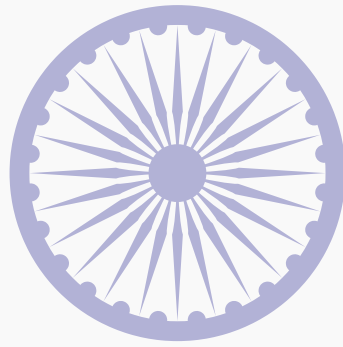
2 December

SINGAPORE

Instead, 2024 is likely to focus on the question of convergence as regulators return to their desire to try and regulate online content. Given this focus, AVIA will shortly be launching our **updated Governance Framework** which promotes a self-regulatory approach for regulators to consider for online curated content. This is something we continue to advocate for and we will use the updated framework, along with MCMC's Content Code, to engage with regulators on the discussion around the differences in online content and, therefore, the need for a nuanced approach.

REGIONAL UPDATES

India continues to be our primary focus amidst potential changes in the regulatory landscape through several consultations. As highlighted in the last AVP, AVIA made submissions on both the Ministry of Information and Broadcasting (MIB)'s **Broadcasting Services Bill** and the Telecom Regulatory Authority of India's (TRAI) pre-consultation on a **National Broadcasting Policy**, and we now await the next steps.



As anticipated, having the two ongoing consultations, with similar names, has caused confusion, especially in media reporting. We understand that it is likely that TRAI will shortly release their draft National Broadcasting Policy, with a parallel consultation, so we continue to monitor this, especially with the upcoming elections and change of staff at both TRAI and MIB. TRAI finally has a new Chairman, whilst MIB has a new Secretary, both of whom AVIA will seek to build relationships with.

Convergence continues to be a driver for a lot of the regulatory thinking, with a desire to bring all forms of broadcasting content under one converged regulator. Whilst there are examples of converged regulators regionally (i.e. Singapore), they do not usually also have converged regulations. AVIA will continue to advocate for clarity and a simplified, light touch approach which takes into account existing regulations that already work successfully. For now, India certainly continues to dominate our attention and we look forward to returning to Mumbai in April for our Future of Video conference, as well as after the elections, to Delhi, to undertake a door-knock that directly engages both the MIB and TRAI, amongst others.

In **Indonesia**, at the start of the year, the government passed the second amendment to the **Electronic Information and Transactions Law (ITE Law)** which governs content and transactions made on online platforms.

These amendments were made to align with changes in the **Criminal Code Law** which will take effect on **1 January 2026**, in an attempt to harmonise the two pieces of legislation. Although the ITE Law amendments were introduced at quite short notice, and without a consultation process, broadly they raised few concerns from a policy perspective.

However, we note that some of the amendments included provisions regarding the protection of children and granting the government authority to terminate access to electronic information. The language in the amendments is quite vague and the detail will only come with the implementing legislation, which has yet to be written. Kominfo will have the pen on drafting this implementing legislation, a process that will take at least a year, giving us plenty of opportunity to engage with them to ensure the language is suitably clear.



In **Malaysia** in February, we had the privilege of meeting up with Malaysia's Communication and Multimedia Commission's (MCMC) newly appointed Chief of Strategic & Planning Policy Sector. It was a particularly fruitful meeting where we were able to discuss our concerns about increased piracy on social media platforms and share useful data with his team. He noted that he had been brought in with the sole aim of regulating online content, however, with the recent adoption of the self-regulation approach in the Best Practice Note for Online Curated Content, it became clear that he was focusing on regulating social media platforms in the short-term, and not the online curated content industry. We will continue to follow this issue as it develops, to ensure that there are no unintended consequences on the online curated content space as their thinking develops.



Another market in the region that looks poised for regulatory changes is **Taiwan**. Following the result of the January presidential elections, cabinet changes are to be expected at the end of May 2024. We've heard repeated rumblings that the National Communications Commission (NCC) is continuing to develop their thinking on the **OTT TV Act**.

With this in mind, we plan to visit Taipei towards the middle of the year to meet the NCC and directly advocate a self-regulation approach, as well as continue to raise our concerns on the possible inclusion of local content quotas.

Discussions in **Thailand** about OTT regulations seem to have stalled amidst disorganisation and a lack of consensus within the **NBTC**. There are reports of a proposal to reorganise the NBTC into eight operational divisions including **policy and planning, academic, licensing, entrepreneur promotion and protection, legal and administrative, regional operations, organisation management, and supporting divisions**, based on convergence for a more practical workflow but this has yet to be considered. However, without a Secretary General in place, or a clear process for appointing one, it is likely that this stalemate will continue.



Looking forward, it is clear that the focus on policy issues regionally will continue to keep us busy. And with upcoming trips to **India, Taiwan, Japan**, and **Korea**, amongst others, we will continue to share best practices and build relationships with regulators, in an attempt to stay ahead of the regulatory curve. If any of these issues, or others that we haven't covered here, are of interest to your policy team, feel free to reach out to us.

CLARE BLOOMFIELD

MATTHEW CHEETHAM

GENERAL MANAGER

Facebook was launched in 2005 and is currently the third most visited site in the world. Instagram being the fourth, was launched in 2010, and bought by Facebook in 2012. Telegram is a relatively late starter, being launched in 2013, but has quickly risen to be one of the most popular apps in the world. TikTok's initial release was 2016, and it is also one of the most popular apps in the world now. CAP's 2024 YouGov Consumer Surveys show these four social media and messaging apps are now leading the way when it comes to piracy of CAP content in Asia-Pacific. A core focus for CAP in 2024 will be on reducing piracy on, and via, these platforms.

RESEARCHING AND TECHNOLOGIZING



CAP's annual **YouGov Consumer Surveys** are a key part of our work, they help us identify piracy trends around the region and in each country, and inform our strategies accordingly. Our 2024 surveys were completed in Q1 and will be released in Q2.

While the full summaries are yet to be released, some top-line results show that there is a significant increase in respondents stating that they have **accessed pirated content in general (from 52% to 59%)**. There is also a sharp increase in consumers accessing pirated content via social media/messaging platforms this year (from 35% to 49%), and this form of accessing piracy has overtaken International paid online video platforms as the second most popular channel to watch content. For the first time we also have an alternate methodology of incidence of piracy, which is based on the percentage of pirate content watched. Once we finalise the summaries, CAP will issue a regional press release and also work with our partners on localised releases.

In Q1, CAP continued working with White Bullet to refine its tracking of ad revenue on pirate sites in Asia-Pacific via the MagiCAP portal. We provide a monthly list of the 200-300 most popular pirate sites which are then monitored by White Bullet for ad revenue data. This data will be used for discussion with intermediaries and governments around the region.

ENGAGING & OUTREACHING

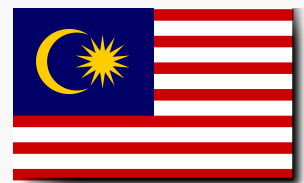
The 2024 YouGov Consumer Surveys showed that not only are most consumers **accessing pirate content via social media and messaging platforms**, but the incidence of piracy via these platforms has increased dramatically across the board, **up from 35% in 2023 to 49% in 2024**.

CAP's outreach efforts to social media and messaging platforms to combat piracy will therefore take centre stage in our engagement and outreach efforts in 2024.

Given the leading role played by **Facebook**, our work with them will be key to these efforts and in addition to our regular liaison with them, we are working on our next Roundtable, likely to be in June. We also continued our regular interaction with **Google**, meeting with them in person in Sydney and in Hong Kong to follow up on numerous issues discussed at our last Roundtable, including the removal of sites blocked via regulatory not just judicial order. CAP also initiated conversations with **TikTok's** regional legal team in Q1 and we aim to replicate our outreach efforts with Google and Facebook with TikTok via regular CAP interactions and CAP member company Roundtables. **Telegram** also looms large as an application of real concern for piracy of CAP member company content in APAC, and CAP are continuing to work with the Indonesian Telecommunications Regulator, Kominfo, on an online workshop with Telegram.

ENFORCING & DISRUPTING

CAP continued to work on blocking applications in our three main markets for such actions – **Singapore, Indonesia** and **Malaysia**. For Singapore, we filed our latest application against 25 pirate sites in March. The hearing is set for April 2 and we expect to have the order issued and implemented later that month. We are working with counsel and the applicants to see if we can ensure that the orders are obtained earlier in future applications. In Indonesia we continue to work with AVISI to file blocking applications, with CAP filing for the IP blocking of more than 150 sites in Q1. Following our high levels of referrals in Malaysia in Q4, 2024 CAP worked in Q1 to identify further sites for blocking which we expect to file in early Q2.



Following the success of the **Yalla project** in late 2023 under which CAP facilitated regular TCRP referrals of the Yalla group of sites on behalf of CAP and non-CAP members, we have seen the rise of Yalla once again in Google search results. We are accordingly undertaking another one-month program of targeted referrals following which we will present our results to Google and discuss with them how we can avoid the issue recurring in the future. We also referred our first lists of blocked sites in Singapore to Google for delisting in late 2023 and received confirmation from Google that they had delisted those eligible. We will forward them our next round of sites in April. We will also refer our next round of all blocked sites in the region to Facebook for removal from their various platforms.

COLLABORATING



Collaboration with key stakeholders, particularly local coalitions, will continue to be a key focus of CAP's activities in 2024. This began in February when we worked closely with **AVISI in Indonesia** to ensure a quality anti-piracy panel that CAP moderated at the Sportel event in Bali, and we continued our work with AVISI in attending the AVISI 2024 Indonesian Video Streaming Conference in March.

The passage of the **Online Site Blocking bill** in the Philippines is a high priority event for CAP in 2024 and we will be working closely with the **Video Coalition of the Philippines (VCP)** to ensure the bill's successful passage.

As initiated last year, rather than being held with AVS as was traditional, CAP's **State of Piracy (SOP)** event is now held in conjunction with an AVIA in-country event, and in 2024 this will be in **Vietnam in October**. However, AVS remains a great opportunity to amplify anti-piracy issues and concerns and in March CAP moderated an anti-piracy panel at AVS in Hong Kong. Speakers on the panel were all CAP members, and included the Premier League, TVB and our latest member, Vobile.

CONCLUDING

While CAP will continue our full-court press, the timely release of CAP's latest YouGov Consumer Surveys has given us clear direction to focus our efforts on combatting piracy on social media and messaging platforms in 2024.

Member Report

Sustainability (ESG) Developments in the Telecoms Industry



Sustainability and ESG (Environment Social Governance) reporting is becoming a regulatory requirement in numerous countries while rapidly becoming part of the consumer conscience. What does that really mean and is the video industry in Asia ready for this impending future?

In this report we set out findings by Pioneer Consulting Asia-Pacific (PCA) from analysis of ESG initiatives undertaken by the telecommunications industry, to see what learnings there are for the video industry to adopt.

The Sustainability (ESG) Developments in the Telecoms Industry Report is accessible to AVIA Members only. Kindly log in to your account for access.

ASIA VIDEO SUMMIT
2024
13-14 March | The Grand Hyatt Hong Kong



avia
ASIA VIDEO INDUSTRY ASSOCIATION

VIDEO INDUSTRY SEES OPTIMISM AMIDST RATIONALISATION, THE CONTINUED IMPORTANCE OF ASIAN CONTENT AND AI EVERYWHERE

The **Asia Video Summit**, the marquee conference for the video industry kicked off in Hong Kong this year from 13 - 14 March, as part of the HK Entertainment Expo. The Summit opened with an overview on the state of video in Asia, and how scale had redefined the industry.



Vivek Couto, Executive Director, Media Partners Asia

Vivek Couto, Executive Director, **Media Partners Asia**, shared that the ecosystem had changed, and a new pecking order was in place, with the global digital giants dominating video action in APAC, with a total video and screen revenues of US\$24.4B coming out of Asia in 2023. Couto also shared that Chinese short form drama may be the next big thing, with the domestic market having grown to half a billion in 2023.

For **Karen Fu Binxing**, CEO of **Huace Group**, one of China's largest content producers, the increasing interest in Chinese content overseas filled her with optimism on the rise of Chinese content, with a view to focus more on international cooperations. Fu also added that AI was unstoppable and would bring changes to all aspects of production and broadcasting trends in the content industry.



Left to Right: Karen Fu Binxing, CEO of Huace Group and Louis Boswell, CEO of AVIA



Left to Right:

Avi Himatsinghani, Founder & CEO, Rewind Networks, James Gibbons, President, Asia Pacific, Warner Bros. Discovery and Agnes Rozario, Director of Content, Astro

James Gibbons, President, Asia Pacific, **Warner Bros. Discovery**, stressed the importance of focusing on both growth and profitability for streaming in APAC. Gibbons also added that the reason the pay TV model worked so well was due to its dual revenue streams, and this needed to be recreated for streaming. The fact that advertising in a premium video environment lagged so far behind social and UGC video platforms was a huge issue for the industry, and hence it was incredibly important that people who had an investment in premium video came together to solve this issue.

Closing off the Summit, **Alexandre Muller**, MD, APAC, **TV5MONDE**, said that the region needed to listen to local audiences and deliver what they want, and not listen to all the noise coming out of the US. "Asia is Asia, we need to follow our own path and find the right equilibrium among ourselves," said Muller.

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

UPCOMING EVENTS

avia Future of Video India

ASIA VIDEO INDUSTRY ASSOCIATION

25 April 2024 | JW Marriott Mumbai Juhu

www.avia.org

2024 may well become a watershed year for India with potentially the largest M&A Asian entertainment deal that would fundamentally change the media landscape for this country with over a billion consumers. Will it happen and will there be any other mega mergers?

One of the most dynamic and competitive video markets in the world, India remains one of the few markets where linear pay TV continues to be robust, with streaming also making significant inroads, with over 100 million subscribers. The big challenges, however, continue to be monetization, especially in the light of escalating costs even as India continues to build and expand on a growing content industry, and various changes in the regulatory landscape being proposed.

Profitability, ARPU, sustainable monetization models - what are the different strategies to success? How else are organizations generating more revenue? What's next for the India content industry as new tech like AI/AR continue to being fast adopted by media companies, and will Bollywood regain the dominance it once had? And, is there room still for smaller players beyond the behemoths that will be created by M&As?

Sessions Not To Be Missed

State of Video in India



As India takes the global spotlight with significant investment shifting out of China into the sub-continent, what does the future hold for India's ever-growing video ecosystem?

Monetizing the Stream



With most major streaming services yet to turn a profit, the future of streaming clearly lies on its ability to crack this nut. What needs to be done and how? Are there new revenue streams that can be better leveraged? Will aggregation be the answer or will FAST be the way forward?

Making a Mark Globally



With the Oscar winning *The Elephant Whisperers*, India has deservedly reaped global recognition for its prowess in factual content production. So what next? Is this the peak or does this herald the start of a golden era for this genre in India?

Does Regional Content Make Better Business Sense?



With lower ARPUs than traditional pay TV, is scale even more critical for streaming success? With an ability to attract and retain regional audiences and attract greater regional advertisers, does investing in regional content today make better business sense than ever?

[Register Now](#)



[Preliminary Programme](#)



Join us on **Thursday 25 April** at the **JW Marriott Mumbai Juhu** as we dive into these questions and more on the Future of Video in India! Register before **3 April** with Promo Code "**EARLYBIRD**" to save USD 80!

Member Reports:

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



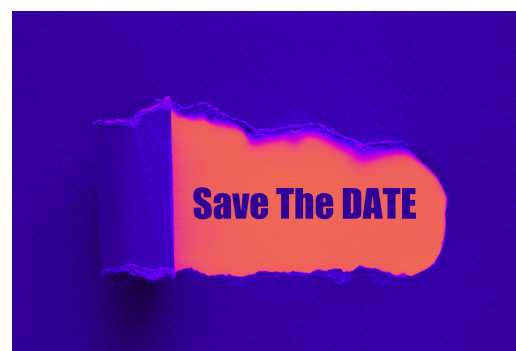
New Members:

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:



2024 Upcoming Events:

Future of Video India	25 April
Satellite Industry Forum	28 May
Korea in View	27 August
Japan in View	29 August



Contact Us:

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

POLICY	CLARE@AVIA.ORG
PIRACY	MATT@AVIA.ORG
INSIGHT & MARCOMMS	CHARMAINE@AVIA.ORG
MEMBERSHIP & SPEAKING OPPORTUNITIES	GREG@AVIA.ORG
EVENTS & SPONSORSHIP	ADELA@AVIA.ORG
EVERYTHING ELSE	LOUIS@AVIA.ORG

ADDRESSES: 20/F LEIGHTON CENTRE, 77 LEIGHTON ROAD, CAUSEWAY BAY, HONG KONG
5008 ANG MO KIO AVE 5, #04-09 TECHPLACE II, SINGAPORE 569874