

ASIA VIDEO PULSE

THE NEWSLETTER OF THE ASIA VIDEO INDUSTRY ASSOCIATION



2025 EVENTS

Future of Video India

2 May

Trident
Bandra Kurla
Mumbai, India

CREATING A THRIVING CONTENT INDUSTRY IN ASIA

The landscape of content production in Asia is at a crossroads. With the rapid expansion of streaming services and a growing demand for high-quality local content, governments across the region are grappling with how best to foster a vibrant media and production ecosystem. At AVIA, we believe that government policies play a crucial role in either enabling or stifling the growth of local content industries. These policies exist on a continuum, ranging from restrictive interventions to incentive-driven approaches that encourage investment and innovation.

The Risks of Restrictive Policies

On the more interventionist end of the spectrum, some governments have sought to regulate their content industries through measures such as content quotas, licensing requirements, and heavy-handed restrictions on foreign investment. These policies are often implemented with the intention of preserving local culture and ensuring a fair share of the market for domestic producers. However, the reality is that such measures frequently lead to unintended consequences

Strict content quotas, for example, may force platforms to include local programming that does not meet audience preferences, ultimately reducing viewer engagement. Licensing requirements and complex bureaucratic processes can deter international partnerships, limiting the infusion of capital and expertise necessary to elevate production quality. Rather than fostering a dynamic industry, restrictive policies tend to stifle creativity, discourage investment, and result in a stagnant market with fewer compelling stories reaching audiences.

The Power of Incentives

On the opposite end of the policy spectrum, we have seen time and again that open, well-structured production incentives can be a game-changer. Countries that offer broad, predictable, and transparent incentive programs are far more likely to attract high-quality productions, which, in turn, create jobs, develop local talent, and boost the global appeal of their content industry.

One of the clearest success stories in Asia is South Korea. While many nations are eager to replicate Korea's dominance in global entertainment, one of the most critical lessons from its success is the absence of restrictive policies that could have hampered the industry's growth. Instead of imposing quotas or limiting foreign investment, Korea has focused on fostering a competitive and open marketplace where creators can thrive. This approach has allowed for a surge in globally successful content, from K-dramas to K-pop, making Korea a powerhouse in international entertainment.

Broad vs. Selective Incentive Schemes

Within the realm of incentives, it is also crucial to consider the design of such schemes. While some governments implement selective incentives targeting specific projects, these tend to be less effective at fostering a truly dynamic industry. A more open approach—where incentives are available to a wide range of productions meeting clear and transparent criteria—ensures that investments are not limited to a handful of politically favoured projects. Open schemes help build a competitive ecosystem, leading to the creation of content with global appeal rather than just meeting arbitrary benchmarks.

AVIA's Role in Shaping the Future

At AVIA, we are actively engaging with regulators and governments across Asia to advocate for policies that will enable the content and production industry to flourish. A significant part of this conversation is ensuring that our industry is properly understood and not conflated with social media and user-generated content (UGC) platforms. While social media presents its own regulatory challenges, the professional TV and streaming industry operates under different dynamics and should not be subjected to policies designed for an entirely different digital ecosystem.

Conclusion

For Asian nations looking to build thriving local content industries, the path forward is clear. Restrictive measures, though often well-intended, tend to discourage investment and limit the potential of domestic production sectors. By contrast, broad and transparent production incentives have proven to be a powerful tool in attracting investment and fostering creative excellence. As demand for premium local content continues to rise, governments have an opportunity to shape policies that will not only support their domestic industries but also position them for success on the global stage.

Louis Boswell

2025 EVENTS

Archipelago Video Summit

2 September

Jakarta, Indonesia

Northeast Asia Video Summit

28 October

Tokyo, Japan

Asia Video & OTT Summit

3-4 DECEMBER

SINGAPORE

POLICY MATTERS

CLARE BLOOMFIELD

CHIEF POLICY OFFICER

Being asked to write an update for our quarterly publication always leads to a moment of reflection and I'm always astonished first, by how fast time has flown by, but also, more importantly, by how much has happened in such a short space of time. The new year often starts off slow, partly due to the variety of holidays in the region, and partly, this year, due to the ongoing political changes resulting from last year's elections. 2025 is no exception to other years. January was relatively quiet, with just the regular USTR 301 consultation on our desks. Then February brought a flurry of activity as India, Indonesia, and Thailand issued draft regulations. March continued in this vein, with Taiwan introducing amended regulations on e-cigarettes. I suspect this pace of change will continue as regulators in the region continue to focus on online safety and child protection issues, often grouping (either deliberately or inadvertently) all forms of online content together. As always, AVIA will continue to make the case that not all forms of online content are equal and, as such, need a nuanced approach.

INDIA

As such an active market, India always merits a mention in our policy updates and this quarter is no exception. As the Indian government prepares for its inaugural **World Audio Visual and Entertainment Summit (WAVES)** to be held in May, the regulatory focus remains on a desire to regulate the occasionally contentious content available on OTT platforms. Also in India, the **Ministry of Electronics and Information Technology (MeitY)** issued a consultation on the Digital Personal Data Protection Rules, which are the implementing guidelines for the Digital Personal Data Protection Act. We await the publication of the final Rules, having sought clarity on some of the terminology and timelines in the draft consultation.



INDONESIA

Following the election in Indonesia last year, the ongoing issue under scrutiny is online child safety. **Komdigi** – previously Kominfo – raised this issue towards the end of 2024 but failed to progress towards an agreed regulation. President Prabowo made it a priority issue in early 2025, requesting that Komdigi undertakes consultations and finalises regulations as soon as possible. In February, Komdigi formed a new working team to strengthen efforts to draft a regulatory framework to ensure online child protection, with a stated intention to limit children's social media usage.



This working team involved various govt departments (Komdigi, Ministry of Primary and Secondary Education, Ministry of Health, Ministry of Women’s Empowerment and Child Protection) as well as academics and representatives from children-focused Non-Governmental Organisations (NGOs), stating that their focus will be on **‘strengthening government surveillance and controlling children’s access to digital platforms; raising children’s and parents’ awareness about the risks of using digital platforms, including banning and limiting children’s access to social media and stricter law enforcement against perpetrators and distributors of dangerous content’**. AVIA was invited at short notice to participate in one of the working groups, followed by an extremely short timeline to submit written comments, without sight of the draft regulation. We now await the final piece of legislation which we anticipate will be introduced in the next few months.

THAILAND

Elsewhere in Thailand, the **Ministry of Digital Economy and Society (MDES)** issued a consultation on the **Platform Economy Act (PEA)**. From our understanding, the PEA is aimed at intermediaries and digital platform service businesses, replacing the Royal Decree on the Operation of Digital Platforms. The draft Act defines digital media services as any service provided over a computer network internet system, or telecom network that acts as a medium between the sender and the data receiver. It also notes a requirement for all (Thai and foreign) online platform operators to appoint a point of contact to liaise with the Electronic Transactions Development Agency (ETDA) if they have any users in Thailand, but doesn’t go as far as mandating establishment of a local entity in Thailand. Critically, for our purposes, online platform services is defined as **“the provision of intermediary services in the hosting category that involves facilitating the matching of various types of users to enable transactions or interactions”**. Whilst we do not assess that this Act is aimed at the Online Curated Content (OCC) industry, some of the language in the draft could cause some confusion, and therefore, AVIA has put in a short submission urging clarity to ensure that OCC services are not captured in this Act.

TAIWAN

As we have seen in other markets, regulation, which can impact AVIA members, is sometimes driven by less obvious regulators. This has been especially true in the last few years as various Ministries of Health in the region have endeavoured to introduce health-related legislation with the stated goal of reducing consumer harm, but often without a clear understanding of the potential impact of unclear regulations. Smoking, and tobacco products, especially the advertising of, has been an issue where we have seen regulators in India and Indonesia attempt to address.

Taiwan's Ministry of Health and Welfare (MOHW) has joined this trend, issuing a draft **Amendment to the Tobacco Hazards Prevention Act**, which focuses especially on the advertising of e-cigarettes. Whilst AVIA recognises the desire to tackle this issue, the draft legislation language was especially unclear and open to misinterpretation, potentially enabling regulators to attempt to use it against content that shows e-cigarettes, rather than simply limiting it to advertising. Despite an extremely short consultation period, AVIA submitted comments suggesting that relevant terms be clarified to ensure business clarity and confidence.

FORWARD LOOK

Looking forward, whilst it is usually hard to predict what issues regulators might introduce, it is clear that child protection and online harm will continue to be a focus of discussions in the next few months. This topic formed one of the key sessions at our Policy Roundtable event at the end of last year, an event which attracted a record number of regulators from around the region.

Another topic of interest at the event was the subject of Artificial Intelligence (AI) and its implications for the content industry, especially from a copyright perspective. It was heartening to hear the views of regulators on these topics, amongst others, and it also enabled them to hear from members about the challenges in the industry, thereby facilitating closer cooperation and initiating crucial dialogues. Whilst it is far too early to think about this year's Policy Roundtable, I am confident that both online harm and AI will remain on the agenda.



Finally, having published our updated **Policy Matrix wallchart** at the end of last year, the Policy Team has now initiated regular interactive sessions to assist members in accessing and utilising the most up-to-date online **Regulatory Matrices** and other policy products available on our website.

These sessions, and this data, is only available for AVIA members and offer deep-dive insights into all of the markets we cover from both a regulatory and wider political perspective. Should you have any inquiries regarding these matrices or wish for us to conduct sessions for your respective organisations, please contact our Policy Team at regulatory@avia.org.

CLARE BLOOMFIELD

2025

Calendar of Events:

2

May

Future of Video India

Trident, Bandra Kurla, Mumbai

2

September

Archipelago Video Summit - Indonesia, Malaysia and Philippines

Jakarta, Indonesia

28

October

Northeast Asia Video Summit - Japan, Korea

Tokyo, Japan

3-4

December

Asia Video and OTT Summit

Singapore

**Dates may be subject to change*

**MORE
INFORMATION**

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MATTHEW CHEETHAM

GENERAL MANAGER

In the words of Sherlock Holmes, “It is a capital mistake to theorize before one has data. Insensibly one begins to twist facts to suit theories, instead of theories to suit facts.” And for this reason Watson, research underpins everything that CAP does, and our annual YouGov consumer surveys are the bedrock of our knowledge base. We undertook our 2025 surveys in early Q1 and we expect to have the results published in early Q2. Initial indications are positive. While piracy remains higher than we would like, there has been definite progress, particularly in respect of piracy on social media and messaging platforms. The value of research cannot be overestimated.

RESEARCHING AND TECHNOLOGIZING

You cannot properly tackle a problem unless you know what the problem is. This is even more so when the nature of the problem can change on a regular basis, as piracy and its many forms do, particularly in Asia Pacific. Yesterday’s problem is not necessarily today’s, and last year’s piracy concern may not be this year’s. CAP’s annual YouGov consumer surveys are a key part of our work, ensuring that we identify piracy consumption patterns and trends. The 2024 surveys showed us that piracy via social media and messaging platforms had spiked and in 2024 CAP focussed our resources in that area. Initial indications from our 2025 surveys are that **piracy on social media and messaging platforms has dramatically declined in the last 12 months**. The 2025 survey also shows ISDs continue to be of concern in many countries, notably Hong Kong, Malaysia and Vietnam. Building on our earlier research into consumer harm caused by piracy services, in late 2024 CAP released research undertaken in Taiwan that indicated the **concerns from ISDs are wider than just consumer harm**, it also encompassed potential harm to wider infrastructure. In 2025, CAP is working to leverage this research with governments in the region, as well as working on further research in this space, focussing on data and privacy security.

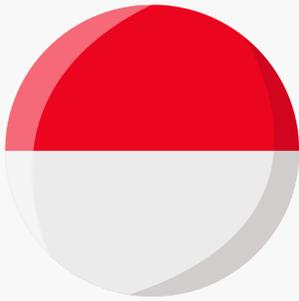
ENGAGING & OUTREACHING

CAP continued to build on its strong relationships with the three major platforms in the region, **Google, Meta and TikTok**. Roundtables are key to this work as they enable CAP members to raise issues of concern with the platforms who in turn have time to address them. In late 2024 we held Roundtables with TikTok and Google. For the former we are continuing to work on an MOU that we hope will bring substantive results for CAP members. For Google, following discussion at the Roundtable we were able to confirm Google’s removal of ‘ghost apps’ that were only activated during game times from their Play Store. CAP will hold its next Roundtable with Meta in person in Singapore in early April.

After many years of exerting external pressure, in early 2025, CAP initiated our **first outreach to Telegram** via a call with their legal counsel. The call was constructive and will be the first of many. We also hope to have our first Roundtable with Telegram later this year.

CAP also maintained its engagement with governments in the region via presenting to the government at an Astro/MyIPO hosted anti-piracy event in Malaysia. The Taiwan ISD research was a key component of our presentation, and we intend hosting further workshops later in the year around this research.

ENFORCING & DISRUPTING



CAP's enforcement strategy for the last few years has focussed primarily on extensive interaction with the social media and messaging platforms as well as **site blocking in Indonesia, Malaysia and Singapore**. We achieved notable progress with the platforms in 2024, with the YouGov surveys indicating greatly reduced consumption of pirate content via their services. For site blocking we are seeing greatly reduced numbers of sites in Indonesia and Malaysia offering international content, which we hope is in part due to our ongoing program of monthly referrals of sites for blocking in both countries. In Q1 CAP also obtained another blocking order in Singapore, the earliest to date we have obtained such an order. In 2024 CAP also increased its investigative capabilities and undertook **four investigations** that were referred to CAP members. One of these investigations remains ongoing in 2025 and we are hopeful it will lead to either the shutdown of the service, and/or criminal prosecution of the operators. We are also working with some CAP members against ISD operators, in particular UBox, to pool resources and efforts across the region.

COLLABORATING

Bringing together industry and government to heighten awareness of piracy and discuss issues to address has always been a focus for CAP. **Enforcement workshops** are a key component of this work, particularly in conjunction with local associations and coalitions, and we held separate workshops in Indonesia, Malaysia and Thailand in 2024. In 2025, CAP is working with the local coalitions in **Taiwan** to host a further enforcement workshop, likely in May. We also intend holding an enforcement workshop in **Hong Kong** around the same time. As always, CAP also continues with its regular program of Quarterly Reports and Meetings, with the next Quarterly Meeting likely to be held in April.

Elementary!

COMMON CHALLENGES IN A FRAGMENTED INDUSTRY FOR 2025

Despite its diversity, the video industry faces shared challenges that require collective solutions. This is where AVIA plays a pivotal role, serving as a unifying force for the industry. Some of the key areas of focus include:

1

Engaging with Regulators

As the industry evolves, so too does the regulatory landscape. Policymakers across Asia are grappling with how to apply existing frameworks to new business models and technologies. For instance, questions around content quotas, licensing requirements, and taxation for streaming platforms remain hotly debated.

AVIA plays a critical role in engaging with regulators to ensure they understand the complexities of the industry. By providing data, insights, and a platform for dialogue, AVIA helps policymakers craft regulations that enable all parts of the industry to thrive. This is particularly important in Asia, where regulatory approaches can vary significantly from market to market.

2

Fighting Piracy

Piracy remains a significant threat to the industry, undermining legitimate businesses and robbing content creators of fair compensation. The rise of streaming has made piracy even more pervasive, with illegal services often offering content at a fraction of the cost—or even for free.

AVIA has been at the forefront of anti-piracy efforts, coordinating industry-wide initiatives to shut down illegal services, raise consumer awareness, and promote the value of legitimate content. Collaboration with governments, technology providers, and enforcement agencies has been key to these efforts.

3

Supporting Advertising in Premium Content

Advertising has long been a cornerstone of the video industry, particularly for FTA broadcasters and, more recently, ad-supported streaming platforms. However, the shift toward digital has brought new challenges, including competition from social media and short-form video platforms.

AVIA advocates for the value of advertising in premium, long-form content, emphasizing its ability to deliver high engagement and brand safety. By working with advertisers, agencies, and platforms, AVIA helps ensure that advertising remains a viable revenue stream for the industry.

4

Engaging with Local Markets

Asia's diversity is one of its greatest strengths, but it also presents unique challenges. Global trends, such as the rise of streaming, often play out differently in local markets due to variations in consumer behaviour, infrastructure, and regulation.

AVIA's work in engaging with local markets helps the industry navigate these differences. Through events, research, and partnerships, AVIA provides insights into local trends and facilitates collaboration between global and regional players. This ensures that the industry remains responsive to the needs of audiences across Asia.

Future of Video India

2 May 2025

Trident, Bandra Kurla, Mumbai



KEY THEMES

India's premium video industry is undergoing rapid transformation, fueled by an increase in OTT platform subscriptions, the rise of ad-supported models, a growing investment in local content and industry consolidation. Valued at \$1.7 billion in 2023, analysts expect the industry to nearly double by 2028. This growth positions India as the fastest-growing OTT market in APAC.

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**Linear and Cable TV –
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**Investing in Local: Fuelling
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**It's All About the Money:
Advertising Trends in Video**

UNLOCKING OTT SUCCESS:

Key insights every advertiser needs to engage audiences, optimise placements and drive results

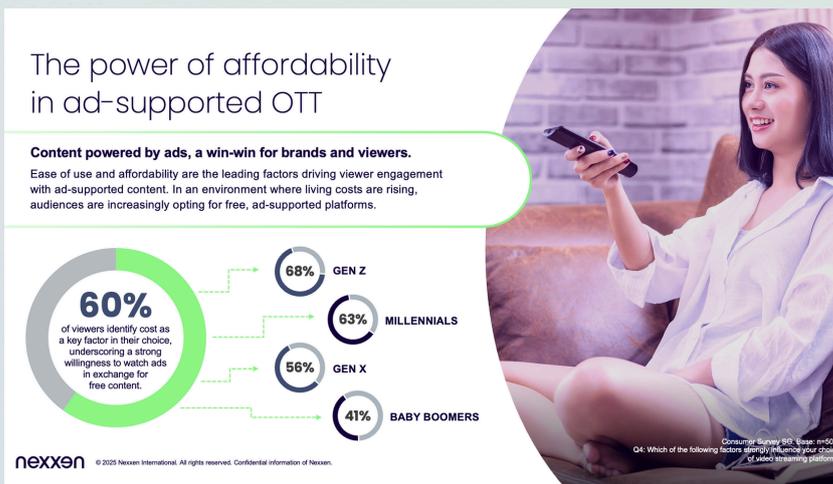
The OTT advertising market in Singapore (and around the world) is growing, and there is so much runway for growth in this sector. To get more insights into OTT consumption and perception, Nexxen recently commissioned a survey to surface how Singaporeans use and feel about ad-supported streaming platforms.

While we've recently made the full report available [here](#), this article touches on some of the key data points and the trends they represent to highlight just how relevant OTT is for advertisers in 2025.

Affordability is Attractive

Cost-of-living pressures continue to influence consumer spending. Whether it's in groceries, energy bills, rent, or other product and service categories, Singaporean consumers are welcoming opportunities to save.

In the case of screen-based entertainment, services that incur monthly or annual subscription costs might not be feasible, especially when viable alternatives exist. Our research suggests that platform costs significantly influence viewer behaviour. When asked which factor most influenced viewers' choice of streaming platform, cost was identified by 60% of our survey group.



It's clear that many consumers are happy to watch ads in exchange for free content, and the many ad-supported streaming platforms available in Singapore make for content-rich and easy viewing experiences. Advertising partners of these platforms naturally stand to gain the benefits.

Ad Responsiveness and What Viewers Want

When we asked viewers which actions they had ever taken after viewing an ad on an ad-supported streaming platform, 36% acknowledged they had researched a product or service online, while 33% had actually visited the relevant brand's website.

Ads that present special offers and clear benefits are particularly motivating for viewers, and this demonstrates the importance of brands delivering value-driven messaging in their campaigns.

Singaporean consumers are calling for more of this, too. When we asked what improvements, viewers would like to see in advertising on video streaming platforms, 51% identified ads that offered immediate benefits, such as discounts or free trials for goods and services.

MEMBERS' VIEWS

Growing The Role of OTT in Advertising Strategies

Our research reinforces the strong case for advertisers operating in Singapore to adopt advertising on OTT services if they haven't already.

Taking into consideration things like high engagement levels, cost motivators and the likelihood of viewers to take action after seeing ads, the Singaporean streaming landscape provides a great opportunity for OTT advertising growth.

We observed that 73% of Singapore-based advertisers hold a positive impression of OTT advertising and expect to factor them considerably into their overall marketing mix in the next 2-3 years.

Additionally, more than a quarter of advertisers see potential to outperform traditional media in this sector. We expect this will continue to grow.

While this article has touched on some great data points and the trends that they underpin, there are many more insights waiting in our new report, [Navigating the Future of OTT Advertising in Singapore](#) than what I've covered here. I encourage you to download it and explore the complete findings.

nexxen

Amresh Kumar
Commercial Lead
Nexxen Southeast Asia



RESEARCH INSIGHTS

Premium OTT: Building Its Rightful Place in the Digital Market

OTT is PREMIUM

The Superiority of Professional Over Social Video Couldn't be Clearer



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TALENT DEVELOPMENT PROGRAMME

In collaboration with Cultural and Creative Industries Development Agency (CCIDA) of the Government of the Hong Kong Special Administrative Region's Talent Development Programme, AVIA is proud to introduce the [Business Training Sessions](#) - a unique opportunity for small and medium-sized enterprises (SMEs) as well as students to transform their creative and innovative ideas into viable business concepts.

By fostering a culture that encourages the sharing of ideas across borders and facilitates cross-generational collaboration, AVIA aims to empower media players to leverage the fresh perspectives and innovative ideas of young professionals. Check out what's on offer by our group of Young Talents.

Unlock the Future of Storytelling with Scan the World's 3D Technology



Scan the World empowers media professionals, content creators, and brands to effortlessly convert real-world spaces, products, and film locations into interactive, photorealistic 3D experiences—directly viewable from any mobile browser.

Capturing environments and objects is as easy as recording a short smartphone video. Their advanced AI technology automatically transforms footages into fully interactive, mobile-compatible 3D assets. This streamlined workflow makes tasks like virtual film-set scouting, pre-production planning, and interactive storytelling faster, simpler, and more collaborative.

Media teams can remotely explore and annotate real locations, dynamically adjust virtual scenes, and share immersive experiences with stakeholders instantly—accelerating creative collaboration and decision-making.

Successful applications include immersive virtual events for educational institutions and interactive 3D libraries for medical education. Scan the World's accessible, intuitive platform requires no specialized hardware, providing built-in editing tools, augmented reality capabilities, and seamless mobile compatibility.

Incubated at Hong Kong Science and Technology Park, Scan the World looks forward to partnering with visionary content creators, filmmakers, and innovative brands across Asia—unlocking new possibilities in immersive storytelling, virtual commerce, and interactive media.

Find out more: <https://scan-the-world.com/STW/>

Master of Arts in Digital Learning and Technology Programme, The Education University of Hong Kong



This collection showcases 5 projects developed by Masters students studying in Digital Learning and Technology from the Education University of Hong Kong, exploring various forms of digital learning application in daily life.

➤ **Echoes** is an engaging game designed to teach students about Chinese history. By utilizing gamification and augmented reality (AR) technology, players can actively explore significant historical events, figures, and locations in the city.

TALENT DEVELOPMENT PROGRAMME

- **Hong Kong Gentrification: The Threat of the Hong Kong Generation** leverages AI-generated technology to examine the complexities of gentrification in Hong Kong. This project aims to elevate public awareness regarding the effects of gentrification on local neighbourhoods and communities.
- **Moment** is an innovative application that assists users in documenting their daily lives. It features reminders for daily journaling, helping users capture and cherish important moments.
- **Operature** breathes new life into the traditional art of Chinese Opera by integrating it with augmented reality (AR) technology. By creating AR operas and karaoke experiences, this project makes the art form more engaging and accessible to younger audiences.
- **Start Your Video** is a learning platform aimed to empower women in rural areas by teaching them how to create profitable short videos, helping them to improve their economic and social status through the opportunities presented by digital content creation.

Passing the Torch: Celebrating Young Talents at the Award Ceremony



The **Business Training Session - Award Ceremony** was held on 18 Dec at Preface Coffee and Wine (Tower 535) to wrap up and celebrate the success of the 2024 Business Training Session, bringing together 60+ representatives from participating Young Entrepreneurs, winning teams and industry stakeholders.

The event opened with a welcome address from **Laurel Tsui**, Events Director of **AVIA**, followed by **Jonathan Wong**, Project Director at **The Centre of Entrepreneurship, Chinese University of Hong Kong (CUHK)**. Jonathan highlighted the accomplishments of the winning SME teams who had participated in the learning tours across Korea, Japan, and Vietnam. A high note of the event was the presence of **Ms. Cindy Chan**, Head of Film Production, **Cultural and Creative Industries Development Agency (CCIDA)**, who graciously presented award certificates to each of the ten winning teams.

Following the award presentation, the winning teams shared their experiences and insights gained throughout their journey, fostering an atmosphere of inspiration and collaboration. The event concluded with a networking cocktail reception, allowing attendees to forge new connections.

It was heartening to witness the growth of the ten winning teams, who have built significant business relationships and learnt valuable lessons throughout their learning journey. They have now become ambassadors for the program, actively sharing their stories to inspire the next generation of young talents, thereby fulfilling the purpose of passing the torch to future innovators and leaders.

Contact vanessa@avia.org to learn more about these young startups and unlock your full business potential. Click [here](#) for more information about the Talent Development Program.

Member Reports:

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



New Members for 2025:

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 first quarter, we have been joined by the following companies:

FREOWHEEL
A COMCAST COMPANY

2025 Upcoming Events:

Future of Video India	2 May
Archipelago Video Summit	2 Sep
Northeast Asia Video Summit	28 Oct
Asia Video & OTT Summit	3-4 Dec

**Dates may be subject to change*



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

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