

OCTOBER 2025

ASIA VIDEO PULSE

THE NEWSLETTER OF THE ASIA VIDEO INDUSTRY ASSOCIATION

UPCOMING EVENTS

Northeast Asia Video Summit

28 October

Tokyo, Japan

State of Piracy Roundtable

2 December

Singapore

Policy Roundtable

2 December

Singapore



COMMUNITY

What is AVIA? That is a question I am always asking myself and I often ask our members, because unless there is a clear answer then we have a problem. I know that each company is a member for a slightly different reason and has a slightly different set of priorities but by way of trying to explain some of the upcoming changes we have planned, I am going to attempt to give you one answer that I hope unites all.

This newsletter will remind you of the work we do on the policy front, speaking for our industry with governments and regulators. It is essential there is mutual understanding and a constructive dialogue between us and government to help foster growth and longevity for us all.

You probably don't need reminding of the work we do fighting piracy. Measuring, advocating, investigating and eliminating piracy is what we strive to achieve. For a content industry, not much can be more important.

We have vibrant committees looking at developments in the advertising ecosystem and research and both areas desperately need a collective effort to move forward. Advertising needs to grow and develop in the premium streaming environment and maybe CTV is the beginning of this. And we need to measure it all and yet we still lack a common standard that can sit across content delivered over different media and in different formats.

All this is true and describes much of the work that we do. But while some care more or less about all of these issues, what unites us, I believe, is a sense of community. We are all in it together. We may all have different strengths and weaknesses, we may be operating in different markets, but we all face the same basic challenges and the landscape is common to us all.

As an industry association, we need to give voice and body to that sense of community. Over many years, one of the ways we have done this is through our events. As we look to 2026, we are going to change the nature of these engagements. We are going to change them not only because we have to, but also because we want to.

Since the end of COVID we have seen a constant decline in our ability to monetise our events, not because of a lack of interest or attendance, but because sponsorship revenue has declined while costs have increased.

What was essentially a nice way of bringing our industry together while subsidising membership fees has run out of road. Evolve or die. We don't want to die, so we are evolving.

We will not be hosting the OTT Summit in December and next year we will not be holding formal conferences as we have for many years. Instead we will be holding smaller, more intimate and more frequent engagements and we will be looking to host many of them in our members' offices. They will be open for no fee to employees of AVIA member companies. We will continue to interview industry leaders, debate and question developments in technology and evolving business models. We will do it for our community and it will be hosted by our community. Industry days, round tables, leadership forums, AVIA dialogues, will all happen around the region. And we will find a way to include the voices of all of our members.

We will share more details in the coming months of what these events and engagements will look like, and we welcome your feedback and ideas as well. Let's work together to keep the video industry vibrant and with a strong sense of community.

Louis Boswell

POLICY MATTERS

CLARE BLOOMFIELD

CHIEF POLICY OFFICER

After an unusually active summer from a policy perspective, we are now heading into an anticipated busy autumn which will be capped at the end of the year by our annual Policy Roundtable. Over the summer we have seen regulators focusing more on issues revolving around online safety and Artificial Intelligence (AI), as well as more and more (welcome) distinctions between online curated content and social media. Hand in hand with this has been an uptick in the amount of press commentary as commentators increasingly question regulatory changes. Alongside this we have witnessed unexpected political churn with changes in both leadership, such as in Thailand, and stymied appointment of regulators, such as in Taiwan, all of which places brakes on regulatory thinking.

AI is increasingly appearing on the agenda of regulators in the region, in particular, focusing on a familiar theme of copyright and AI. In the past few months this topic has been raised in several markets, including Hong Kong, Australia, and more recently, India. Whilst we appreciate the desire in all of these markets to harness the tools offered by AI and thus potentially encourage growth in the AI industry, this needs to be managed carefully, especially with regard to protecting the copyright of the content industry. The crux of the issue often revolves around that of “text and data mining” (TDM), with regulators seeking to potentially allow AI companies free access to all content, under the guise of TDM. Our position, in all of these consultations, remains that copyright legislation is already in place and is dynamic, technologically neutral and has been sufficiently flexible to accommodate a range of technological developments since its origin. On top of this, AI developers are able to enter into licensing agreements with copyright holders, enabling creators to be fairly compensated, whilst offering high quality content for AI training. Going forward, AVIA will continue to advocate for strong copyright enforcement over AI access, ensuring that regulators understand the risk to the content industry as technology develops.

INDIA

As usual, India remains an active market from both a regulatory perspective, as well as a social commentary perspective, with increasing focus especially on social media. From AVIA's perspective we engaged with several consultations which touched upon important issues. As already mentioned, the topic of AI and TDM was raised, with AVIA, along with a number of other organisations, setting out to answer questions raised by the Department for Promotion of Industry and Internal Trade (DPIIT). We will continue to monitor how Indian thinking develops on this. Additionally, the Ministry of Information and Broadcasting (MIB) undertook a consultation on amending the Policy Guidelines for Television Ratings Agencies, which date back to 2014. The proposal from MIB to remove some of the current restrictions and potentially allow more competition from a wider range of companies, is driven by a desire to create a Television Ratings Points (TRP) system which more accurately captures and thus reflects the diverse and evolving media consumption habits of viewers across the country.

THAILAND

With the ongoing political changes in Thailand, the regulatory process has slowed somewhat and, with an upcoming shuffle of officials, timelines for current policy issues are unclear. In the meantime, the National Broadcasting and Television Committee (NBTC) undertook a consultation on proposed changes to amend the definitions of “broadcasting business” and “television business” in the Broadcasting and Television Business Act. AVIA noted that online curated content (OCC) service providers are not broadcasting businesses given the stark differences in both the way content is consumed as well as differing business models and audience relationships. Additionally, the NBTC sought feedback on amendments which would introduce licensing or notification requirements, something which would increase regulatory overlap, increase administrative burden and introduces regulatory uncertainty. Whilst next steps from the NBTC are unclear, AVIA will continue to engage on this issue to ensure members are not disadvantaged by unclear terminology. In parallel, the Electronics and Transactions Development Agency (ETDA) is revisiting the Computer Crime Act, which may also have implications for OCC platforms.

VIETNAM

Elsewhere, Vietnam returns to a long-running policy issue around streaming content having previously split content into differing categories which led to different regulatory approaches. Regulating films (including those shown online) under the Cinema Act, whilst regulating, for example, TV series, entertainment, sports etc under the Press Law and Decree 71, which supplements Decree 06 has, amongst other things, led to a situation whereby platforms showing only films do not require a license to operate and are allowed to self-rate their content, in contrast to those showing non-films who need to seek a license prior to operating. Unfortunately, to date, no international platform has successfully been issued with a license resulting in platforms either showing only movies or exiting Vietnam. However, as the Press Law is currently being revisited, this is an opportunity to aim to correct this and bring non-film content regulations in line with those under the Cinema Law.

FORWARD LOOKING

Although hard to believe, we are already deep in the planning stages for the annual Policy Roundtable, taking place in December in Singapore. As usual, this member-only, by-invitation event aims to bring together regulators and key industry representatives to discuss current, and future, policy issues. Having discussed both AI and online safety at the event last year, it has been interesting to see how policy thinking on both of those issues has developed over the past 12 months. Whilst still a work in progress, this year's topics are likely to return to the issue of child safety, examining various regulatory approaches over the past few months, especially where it has become increasingly important to separate social media from the OCC part of the streaming industry. Equally, as regulators return from summer breaks, we anticipate a busy autumn of policy initiatives and look forward to the opportunity to continue to engage where appropriate.

MATTHEW CHEETHAM

GENERAL MANAGER

In the 1970s a Scottish footballer was concussed just before half-time. In those days, concussion protocols were barely understood. The player came back out after the break, played like a man transformed, and scored a hat-trick. When asked afterwards what had changed, the manager quipped: “At half-time he didn’t know who he was — so I told him he was Pelé.” It’s a brilliant story. And it isn’t true. That’s the parallel with piracy: it looks like the real thing, it sounds like the real thing, and for a short while you can even convince yourself it is the real thing. But it isn’t. Just as the Pelé tale is a myth, pirate sports streams and illicit movie apps are a dangerous illusion — unreliable, risky, and underpinned by fraud, malware, and criminal networks. Fans and viewers who fall for piracy are like that concussed footballer: they think they’re playing in the big leagues, but they’re actually exposed, vulnerable, and one hit away from lasting damage.

ENFORCING & DISRUPTING

CAP’s regular program of blocking in Malaysia and Indonesia continued apace in Q3 with regular referrals in both countries. It appears that CAP’s outreach to KomDigi has been successful in overcoming some of their hesitancy in continuing their blocking campaign. Our next block has been initiated in Singapore with targets having been identified and evidence being gathered and we have worked extensively with the CAP applicants and the ISPs on proposals to enhance the efficiency of the blocks and reduce the costs. CAP has also put in considerable work with local counsel and interested members on pursuing a judicial site blocking action in Hong Kong. There remains some way to go but initial indications are positive that such an action would succeed. In Q3 CAP also worked with IPOPHL in an effort to utilise and improve the blocking procedures under the MOU, and we will continue to work with them, and ACE, on this effort.

After liaising extensively with our members on the key concerns and proposed solutions in Q3, CAP initiated a regular program of outreach to the main e-commerce platforms based in Singapore with the focus being takedown of listings of ISDs and hacked user credentials. All three platforms have responded, with varying levels of engagement, however this is an ongoing program that we expect will eventually result in substantive results. Other enforcement work saw CAP meet with the DSI in Bangkok following the filing of a criminal complaint in as a result of CAP’s investigation with TrueVisions into the BayGonHero pirate service.

ENGAGING & OUTREACHING

Engagement with the main tech platforms remains a key priority and CAP held regular calls throughout Q3 with Google, Meta and TikTok. We also referred blocked sites to both Meta and TikTok for removal from their platforms on a global basis and we also worked with TikTok and a CAP member to combat a piracy service exploiting their platform.



Matt Cheetham (right) with LaLiga CEO, Javier Tebas at WFS Hong Kong

Government engagement was once again a key feature of CAP's work in Q3. We liaised with Singapore's Cyber Security Agency to provide them with IPs related to notorious ISDs in Singapore for their further action. We also hosted an enforcement workshop in Hanoi, attended and addressed by the Premier League and FriendMTS, to highlight concerns around piracy to the new government officials.

We had organised a similar workshop in Jakarta, including liaising with various government agencies to speak, that unfortunately had to be postponed due to unrest at the time. CAP acted as moderator at a very well received anti-piracy panel at the World Football Summit in Hong Kong.

COLLABORATING

In Q3 CAP continued its regular program of direct one-on-one member company outreach, Quarterly Reports and Quarterly Meetings, with the next Quarterly Meeting to be held online in October. We are also intending on hosting the Piracy Over the Top (POTT) Roundtable in Singapore in December and will work with our members to host another CAP meeting around that. We are also working with the Content Delivery & Security Association (CDSA) for a joint event to be hosted around POTT.

RESEARCHING & TECHNOLOGIZING

In Q3 CAP completed and distributed our latest research, "Assessing Fraud and Data Exposure Risks to Consumers from Popular Sites and ISD/Apps Across Asia". The report delved deeper into what risks could be identified downstream in the use of pirate services by consumers. The research identified a number of risks, primarily: consumers face severe, multi-layered risks - including advance payment scams, identity theft, malware infections, and account takeover - when engaging with IPTV playlists, illicit streaming devices, and pirated subscription services across Asia-Pacific, and; despite using third-party payment processors or informal bank transfers, consumers have no legal protection or recourse if defrauded, and often unknowingly participate in cybercriminal activity or risk legal consequences.

The report also highlighted a number of concerns with e-commerce platforms, and this will add in to the work that we have recently initiated with these platforms.

Identification of pirate sites for investigation and as the basis of site blocking referrals is a key part of CAP's enforcement program and in Q3 we began working with MUSO to identify this traffic. In addition to providing its usual top 100 sites for pirated content in CAP's priority countries in Asia, MUSO is also providing CAP with a bespoke list of the top 100 live sports piracy sites in each country.

Northeast Asia Video Summit - Japan, Korea

28 October 2025

Andaz Tokyo Toranomon Hills, Japan



Asia's most advanced video markets are entering a new era of transformation. At the Northeast Asia Video Summit, industry leaders from Japan, Korea, and across the region will gather to explore the future of streaming, advertising, content production, and international expansion, from anime and premium drama to sports rights and programmatic innovation.

KEY SPEAKERS



Yu Sasamoto
CEO of Japan and Asia
DAZN



Yoichi Iwaki
President
Representative Director
JCOM Co., Ltd



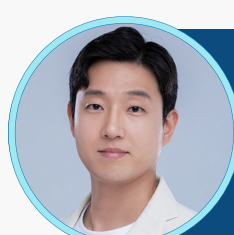
Tomokazu Hori
Group President
Media Business Group
**SKY Perfect JSAT
Corporation**



Joonsuh Park
CEO and President of
Productions
SLL



Katsuaki Setoguchi
Executive Officer
Global Business Division
TBS HOLDINGS INC.
President and CEO
THE SEVEN, INC.



Sunghyun Joshua Cho
CBO
TVING

[Agenda](#)

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The **Archipelago Video Summit 2025** held at the Park Hyatt Jakarta, brought together over 150 senior executives, thought leaders, and innovators from across Asia to explore the future of video in some of the world's most dynamic and diverse markets of Indonesia, Malaysia and the Philippines.



In his keynote, **Hermawan Sutanto**, Managing Director of **Vidio**, shared how the platform is building Indonesia's local streaming powerhouse through sports rights, original content, and AI innovation. From hyper-targeted recommendations to dynamic ad placements, Sutanto highlighted Vidio's focus on execution and predicted that OTT penetration in Indonesia could double within five years.

Jane Jimenez-Basas, President & CEO of **MediaQuest Holdings** and **Signal TV**, spoke on transforming the Philippines' media ecosystem into a content-first, telco-integrated platform. With growing success in micro-dramas and plans for AI-generated short content, she underlined the need for partnerships to scale reach and drive sustainable growth.

Piracy remained a key concern, with speakers from **Vidio**, **Vision+**, and **MainStreaming** calling for a united front that combines technology, education, and policy advocacy. As Vidio's **Gina Golda Pangaila** emphasized, the fight requires both defensive measures and proactive steps to enhance legitimate viewing experiences.

Conversations on monetization and Connected TV reflected optimism for data-driven advertising, as **Samsung Ads'** **Tushar Tyagi** and **WPP Media's** **Sachidananda Panda** pointed to AI, integration, and measurable impact as drivers of the next growth phase.

Pictured left to right: Greg Ho, AVIA, Tushar Tyagi, Samsung Ads, Joseph Lee, PubMatic



Pictured left to right: Louis Boswell, AVIA, Hermawan Sutanto, Vidio, Mike Kerr, BeIN Media Group, Alexandre Muller, TV5MONDE

The CEO Dialogue closed with insights from **beIN Media Group**, **TV5MONDE**, and **Vidio**, highlighting the importance of local collaboration, strategic partnerships, and developing future-ready talent. The discussions ended on a note of optimism - anchored in innovation, adaptability, and a shared vision for a thriving, consumer-centric video ecosystem across Asia.

Visit www.avia.org to access the full press release and event photos [here](#).

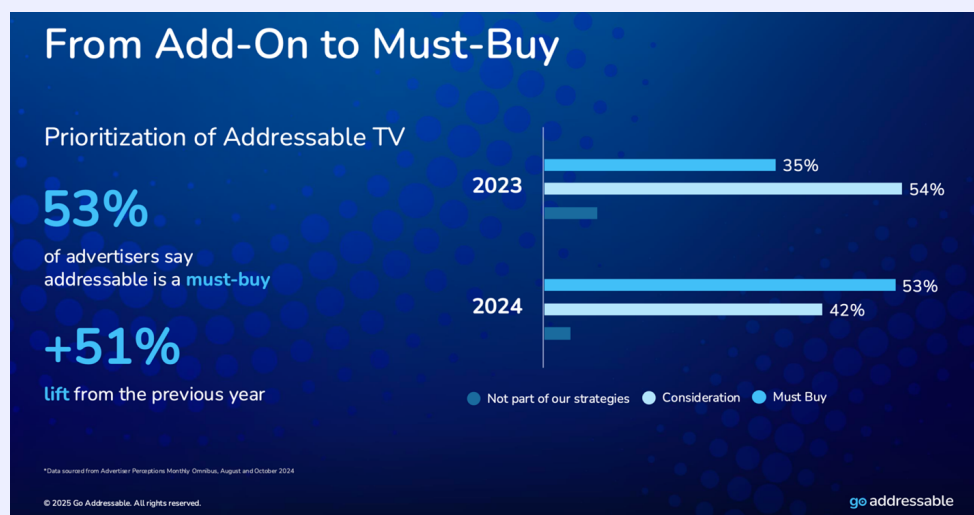
Unlocking New Revenue: The Power of Addressable TV for Asia's FTA Broadcasters

For Free-to-Air (FTA) broadcasters across Asia, the media landscape presents a formidable challenge: audience fragmentation is accelerating, yet the demand for profitable, high-quality content has never been greater. In this environment, the traditional model of selling mass-reach, linear ad inventory is under pressure.

To solve this, Addressable TV advertising has emerged as a critical tool for unlocking hidden value within existing inventory, transforming broad-reach audiences into precise, high-value segments.

Using INVIDI's solutions through which we deliver addressable advertising via virtually any delivery platform to any consumer device, broadcasters can deliver different, targeted advertisements to different households watching the same live program. This shift from a one-ad-fits-all approach to precision targeting is fundamental to improving profitability for broadcasters in competitive markets.

The Direct Path to Increased Revenue



The primary advantage for broadcasters is a direct increase in inventory value. By segmenting audiences based on demographics, interests, and first-party data, each ad slot becomes vastly more valuable to specific advertisers.

Recent data underscores this seismic shift in advertiser sentiment. According to Go Addressable, **over half (53%) of advertisers now consider addressable TV a "must-buy"**, a staggering 51% increase from the previous year. Furthermore, a whopping **65% of advertisers who haven't used it yet plan to start in 2025**, representing a 57% lift from 2022 adoption intentions.

MEMBERS' VIEWS

Advertisers Benefit with More Efficient, Effective Budget Utilization (ROI)

Even though advertisers pay a per-impression premium for this precision, because ads are highly targeted, wasted impressions are reduced dramatically, resulting in brands paying less overall while improving their effectiveness. This efficiency is why **63% of advertisers confirmed that addressable TV played a role in their 2024-2025 upfront negotiations**, a clear indicator of its growing weight in major advertising deals.

Growing Role in the TV Upfronts

What advertisers are saying about addressable TV

67% say it will play a role in their 2025-26 Upfronts negotiations

53% say it is more important this year vs. last year for Upfronts negotiations

Will Addressable TV Play a Role in 2025-26 Upfronts Negotiations?



● Yes ● No ● Maybe

Importance of Addressable TV in 2025-26 Upfronts Negotiations vs. 2024-25



● More ● Equally ● Less

Data sourced from Advertiser Perspectives Monthly Overview, April 2024.

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go addressable

Equally important to advertisers, **addressable TV ads are more memorable, with a 74% image recall rate compared to 68% for non-addressable ads**. This contributes even more to effectiveness of their TV advertising campaigns.

Agencies Also Benefit

INVIDI's experience has demonstrated that addressable advertising, because of its lower overall cost to advertisers, brings in a new set of brands to TV advertising. Companies that could not afford mass TV advertising and focused only on digital platforms are now choosing addressable TV for reach and measurement. Agencies can expand their sales efforts to bring these new advertisers to the TV.

The Time for Action is Now

The evidence is clear. Addressable TV is transitioning from an optional add-on to a core component of the advertising ecosystem. For FTA broadcasters in Asia Pacific, embracing this technology is not about replacing the traditional model, but about enhancing it. By transforming their existing inventory into a precision-based, high-value offering, broadcasters can generate significant new revenue, prove undeniable ROI to advertisers, and secure their role at the heart of Asia's vibrant video industry.



Contributor:

Nick Chuah

Managing Director APAC



Make Your Brand Unmissable on the Biggest Screen in the Home



In today's fragmented media landscape, capturing viewer attention is more complex than ever. As streaming adoption surges across APAC and traditional TV habits evolve, one thing remains constant: the TV screen is still prime real estate for brand advertising. However, in this competitive environment, how and when a brand shows up makes all the difference.

At Samsung Ads, we believe the future of TV advertising begins the moment the screen turns on. To put brands in the spotlight from the very first moment, we offer 1st Screen —a native TV home screen ad format that ensures brands are front and centre before viewers begin their content journey.

[Click here](#) to download the full article. Visit our [Industry Views](#) page for more member blogs.

Contributor:

Jolene Sng

Singapore Country Lead & Head of Agencies SEA , Samsung Ads



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:

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

Rakuten Viki

2025 Upcoming Events:

Northeast Asia Video Summit	28 Oct
State of Piracy Roundtable	2 Dec
Policy Roundtable	2 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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