

Subs love-fest nigh as ops face harsh pay-TV reality

*Asia Pac's new net
pay-TV adds the lowest
since 2007, MPA says on
eve of APOS 2014*

Asia's pay-TV industry gathers in Bali this week for the annual Asia Pacific Pay-TV Operators Summit (APOS) against a backdrop of drooping subscriber growth, warnings of looming "Television Darwinism", and with a sharp focus on renewing consumer bonds across all platforms.

"Television Darwinism will be coming to Asia Pac in force, even in Singapore," says Vivek Couto, executive director at APOS organisers, Media Partners Asia (MPA).

"APOS 2014 will be all about how to make the retail bundle to the consumer more vital," Couto said on the eve of the show, adding that key themes will "reflect the evolution of the broadcast and pay-TV industries, its triumphs and challenges with a keen eye on how the leading brands

...more on page 15

JUST SAYING...

“ I've been coming to MipTV for a long time and people keep asking me 'Are you on TV or digital?' All I can say is that I don't give a sh*t. All I care about is the content.”

Shane Smith, Founder and CEO of multi-platform studio Vice

MipTV Wrap on page 7

WELCOME TO ASIA CESAR!

National Geographic Channels in Asia is proud to announce the launch of a brand new show *Cesar to the Rescue*, premiering on April 30th.

In addition, the network will also be producing local episodes with Cesar, filmed right here in Asia.

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Turner taps NBCUni's Lee to head Asia-Pac programming

Ricky Ow's hand-picked team starts coming together

Turner International Asia Pacific has announced the appointment of Marianne Lee as vice president – content, general entertainment. The widely expected appointment is effective from 2 May.

Lee, who exited NBC Universal in Singapore last week, will “define and execute content and channel strategy” for Turner’s general entertainment brands. These include WarnerTV, the crown jewel of the new GE brands, along with “special interest” brands TCM Turner Classic Movies and truTV.

Lee reports directly to Ricky Ow, president of Turner International Asia Pacific. She shifts back to Hong Kong for the new role following Singapore-based stints at both Universal Networks International,

where she was director of programming and acquisitions, and Sony Pictures Entertainment Networks.

Lee also spent more than 10 years at Hong Kong’s leading free-TV broadcaster, Television Broadcasts Ltd (TVB).

The addition of Lee to Ow’s hand-picked Asia-Pacific team comes less than a week after Turner confirmed WarnerTV’s long-rumoured shift from HBO Asia.

The WarnerTV move, effective immediately, has been happening since the end of 2013 and gives Turner its first significant crack at Asia’s pan-regional general entertainment audiences after more than

20 years of focus on the region’s kids and news space and dabbling on entertainment fringes with TCM and truTV.

This latest change in Turner’s Asia landscape takes the regional general entertainment channel out of Singapore and into Turner’s Asia HQ in Hong Kong.

WarnerTV arrives at its new home at the top of entertainment ratings in Singapore and with an already confirmed commitment to first-and-exclusive series with short release windows.

Turner isn’t planning to change WarnerTV’s branding and positioning for now, the network said.



Marianne Lee

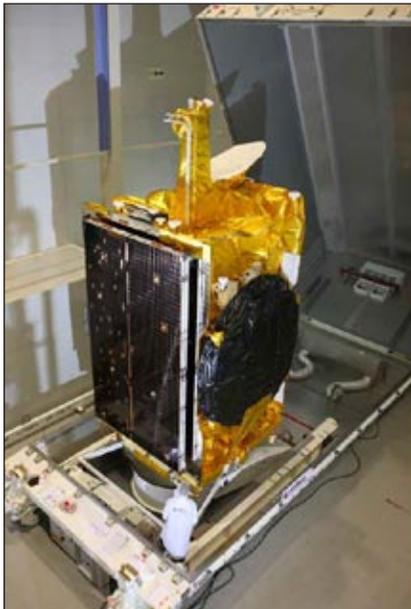
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FROM THE HORSE'S MOUTH



Measat-3b

It doesn't look like much to those not in the know... but for everyone else, this US\$370-million package of hi-tech transported to Kourou in French Guiana this month – finally – is a hal-lelujah moment.

Here's why. In a word, Measat-3b means another 48 Ku-band transponders worth of capacity at 91.5°E over Malaysia, India, Indonesia and Australia. Most importantly, Malaysia's dominant pay-TV platform, Astro, is taking about 18 of those.

This means that talks with Astro will no longer be held under the pall of capacity scarcity. What it doesn't mean is that negotiations will be less painful for those who don't have what Astro wants, but at least there's hope for those who do.

The countdown has begun for a May launch. Pray.

HBO slashes Asia release windows *Originals premiere within 24 hours from July*

HBO Asia is squeezing Asia release windows for HBO and Cinemax Originals to less than 24 hours after U.S. airdates from July this year.

The Singapore-based regional network said on the eve of APOS 2014 (23-24 April) in Bali that the new initiative would include Cinemax Original, *The Knick*, starring Clive Owen and directed by Steven Soderbergh.

New seasons of *Boardwalk Empire*, *The Newsroom* and *Olive Kitteridge* as well as the second season of HBO Latin American series *The Profugos* will also air in Asia less than 24 hours after the U.S. from July.

"Whilst this move is no silver bullet to combat piracy, it's an on-going effort on our part to protect intellectual property, industry, jobs and revenue," said HBO Asia chief executive, Jonathan Spink.



Jonathan Spink, HBO Asia (left); *Boardwalk Empire* season four (above)

"By offering viewers legitimate content in a timely and more convenient manner, we hope to be able to continue to encourage viewers to support the fight against online piracy," Spink said.

The latest move comes six months after HBO shortened Asia release dates to a week after the U.S.

Celestial celebrates Jackie Chan birthday



Jackie Chan celebrated his 60th birthday with fans from around the world

Celestial Tiger Entertainment's latest consumer stunt took winners of a "watch and win" competition to Beijing to meet Chinese superstar Jackie Chan and to attend his Peace and Love birthday concert.

The six winners – three from Indonesia (Indovision, Telkomvision, Skynindo subscribers) and three from Malaysia (Astro) – and their guests were flown to the Chinese capital for the event.

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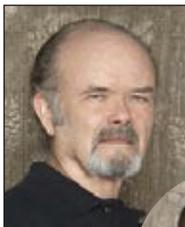
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Rules & Regulations

Taiwan loosens up

Taiwan's regulators are looking at loosening up on monthly pay-TV rates to boost digital take-up for platforms who fulfil certain conditions, such as 100% digital cable services. Local media are quoting the National Communications Commission (NCC) as saying that allowing cable ops to play with some of their rates will encourage platforms to up their digital service games. A *la carte* options are mandatory by 2017. The current cable cap is NT\$600/US\$19.80 a month. Meanwhile, Media Partners Asia (MPA) says pay-TV growth in Taiwan in 2015-2016 will be flat.

Resurrection stars in Asia ahead of Lifetime premiere



Kurtwood Smith (above); Omar Epps (right)



Lifetime is bringing ABC drama *Resurrection* stars, Kurtwood Smith and Omar Epps, to Asia in May ahead of the U.S. series 12 May premiere on the channel. *Resurrection*, which premiered on ABC in the U.S. in March, airs on Mondays at 10pm. Epps (*House*, *ER*) stars as U.S. Immigration and Customs Enforcement agent J. Martin Bellamy, whose desk-bound life is shaken up when he meets Jacob, a mystifying American boy who popped up from nowhere in the middle of rural China. Smith (*That 70's Show*, *24*, *Dead Poets Society*) stars as the apparently content Henry Langston, whose dead son Jacob reappears one day, 30 years after he died, along with a whole army of dead people.

Fox makes David appointment official

Twentieth Century Fox Consumer Products has finally announced the appointment of Pinky David to head its first dedicated consumer products office in Asia. David joined the Singapore-based unit in January this year as vice president, Asia Pacific, from Discovery. The announcement was made by Fox Consumer Products executive vice president of global sales and retail, Roz Nowicki. David previously worked for Turner Broadcasting Asia Pacific in Hong Kong as Cartoon Networks' regional promotions licensing director.



Sorting men from boys: History dudes

A+E Networks is sorting the men from the boys in its new exclusive "Asian Dude-ology" research. The global study, conducted last year by Ipsos MediaCT in Asia, Europe, North/South America, shows that 76% of men in Asia place a greater importance on family than their career. "Career is only a means to the lifestyle they want for themselves and their families," the study says. Men's role within the household has also expanded; they are now more involved with their children, and actively participate in household matters such as groceries shopping. Three in four men in this region are grocery buyers and they also have a bigger say in large household purchases. The study also showed that men need a "man cave" because of their "expanded role and the challenges that come with it". Participants were between 18-49 years old and already within the pay-TV universe. The study driver was providing History advertisers "with a deeper understanding of their target and an audience we know the channel delivers." said ad sales head Charles Less.

Data & Research

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Divisions narrow and gaps close at MipTV 2014 *Asian programmers predict a vibrant Mipcom in October*

The space between "traditional" and "digital" content has narrowed even further and the gap between what "millennials" want and what long-established content creators/distributors are giving them is starting to be filled.

This much was obvious during MipTV, which wrapped in Cannes earlier this month with 11,000 participants and about 4,000 buyers.

Perhaps the market's most delicious deal on multiple levels was the tie up between FremantleMedia and Vice Media on online venture Munchies. The official line is that the channel will combine Vice's "inimitable style and approach" with FremantleMedia's production capability and reach.

Named after Vice's flagship food show, Munchies "will offer a signature perspective on the intersection where humans and food connect and will provide an antidote to the mounds of tired, anachronistic celebrity chef and cook-off shows which simply do not engage millennial audiences".

"This is food as pop cultural conversation," Vice execs said. FremantleMedia's chief

executive, digital and branded entertainment, Keith Hindle, said Vice was "very successful in attracting the 18-34 demo in a way we can't on TV." Most of the IP for the new venture will come from Vice, but the two companies are co-developing content and will share ad revenue.

As the market got under way, Asian participants said that while they expected Mipcom in October to be much busier than Mip, diaries were full and acquisitions by local and regional broadcasters in Asia were steady.

Thailand topped Asia's buzz at the market, with hot and cold running digital terrestrial buyers and programmers looking everywhere to fill the 24 new digital terrestrial (DTT) channels scheduled to be up and running by mid-year.

"What stood out was the high demand for content in Thailand, where digital terrestrial broadcasting just started," said Mikiko Nishiyama, Nippon TV's director, international busi-



Clockwise from top: Michael McKay, activeTV; Mikiko Nishiyama, Nippon TV; Lanny Huang, Playboy Plus; Hyeonza Hong, ITV Studios Global Entertainment

Hong Kong's new free-TV licenses are also driving sales. "The recent free digital licenses granted in Thailand and Hong Kong has seen a surge in content requirements," said Joanne Azzopardi, Beyond Distribution's vice president sales Australasia.

Free digital in Hong Kong and Thailand was a market highlight for Passion Distribution. Senior sales manager, Nick Tanner, said he expected interest shown at MipTV to increase "as competition for quality programming increases".

Online/digital platforms in emerging territories are being closely watched. "It's wonderful to see the steady growth and development of television and digital platforms in emerging territories," says Miramax executive vice president, worldwide television, Joe Patrick.

Tanner also said new pan-Asia channel launches and rebrands "are opening up opportunities for reality, para-

...more on page 8



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from page 7: **MipTV 2014** normal and family orientated programming".

Lifestyle programming is on the rise, driven by the explosion in lifestyle networks and interest in health and wellness, said Raymond Donahue, Veria Living Worldwide's SVP, programming sales. He reported steady growth in attendance at all markets and said countries such as Malaysia, Singapore and Hong Kong "are providing strong opportunities for English-language programming".

Shorter windows on acquired content continue to top rights trends. "In many markets there is an increased demand to be as close as possible to U.S. air dates," Miramax's Patrick said.

China's growing involvement in international content has been a strong theme of past markets. Formats seem to be following factual, with ITV Studios Global Entertainment picking up Star China's home-grown format, *Sing My Song* (see page 10).

China's domestic market, however, continues to be tightly controlled, with new regulations restricting prime-time format acquisitions by satellite channels to a single title in 2014. This tighter environment is driving co-development options that should allow broadcasters and rights holders to air new shows without breaking current rules.

Chinese players repeated their support for the new regulations throughout the market, saying these were a good idea because they would force domestic innovation.

The regulations were a "disadvantage for the channels but an advantage for producers," Star China's Vivian Yin said. In addition to production,

Star China operates three satellite channels in China.

At the same time, China's online platforms have a healthy appetite for foreign formats. ITV Studios Global Entertainment's SVP sales, Asia, Hyeonza Hong, highlighted interest from China's online VOD platforms in entertainment formats.

Pricing is an issue and it's clear domestic Chinese buyers are cautious. "10% of formats

“It's all about a screen ecosystem. It's about bringing TV along with us rather than going back to TV.”

Eddy Moretti, Vice Media

in China get a return on their investment. It's very risky for us," said Song Binghua, Youku Tudou's entertainment production general manger.

The need to work within the rules runs alongside China's push to acquire strategies and knowledge from abroad. "Chinese companies are starting to seek collaborations with overseas partners in the form of co-productions," said Nippon TV's Nishiyama.

Chinese broadcasters continue to look for entertainment formats, with outdoor reality/factual a fast rising formats genre. The outdoor trend is driven by breakout series, *Where Are We Going Dad?*. Although the show is not particularly well produced, many think the slew of copycats likely to follow will take the production industry out of big shiny studio sets and drive up experience of outdoor filming and production.

While the push for original Asian formats continues, foreign formats continue to



Joanne Azzopardi, Beyond

The fun part of watching new best friends – FremantleMedia & Vice Media – play together in Asia is going to be how broadcasters respond to seriously un-PC comments that seem to be a hallmark of the online world. Or at least, the part that is capturing young audiences who aren't subscribing to pay-TV services. One example: a throw-away line on Eddie Huang's travel/cooking show, *Fresh off the Boat*, commenting that Mongolians teach their children young how to "hunt" Chinese with those kiddie archery lessons.



Mario Castro, Televisa



Joe Patrick, Miramax

dominate and entertainment formats are at an all-time high in the region, said Mario Castro, Televisa Internacional's director of Asia and Africa.

"We've seen increased competition... but this is always good for broadcasters and producers since it pushes content creators to constantly innovate and bring new, fresh, interesting and creative ideas to the table," he added.

ActiveTV president, Michael McKay, noted the lack of breakout formats during this year's market. "The free-to-air networks in key markets are still going for it but I get the distinct impression many of the pan-regionals are looking at very few big and expensive formats. I wouldn't say they are going cheap and cheerful but they are certainly guarding the purse strings," McKay

said, adding: "Then there are a couple who are intent on a big and bold statement formats, provided they can garner advertising support". In a nutshell? "Hedge your bets," McKay said.

Passion's Tanner has his eye on the celebrity-led reality trend developing in the Philippines. He said NBCUniversal's *It Takes Gutz to be a Gutierrez* "could pave the way for a sea change in format and finished tape opportunities locally and in the region as a whole".

Televisa's Castro says increased interest in local or regional content is possibly shifting buyers' interest to closer and more local content markets. Demand is still strong in certain territories "but we've seen a shift of foreign productions towards pay-TV as the Asian market matures and their own content gathers pace, momentum and demand," he said.

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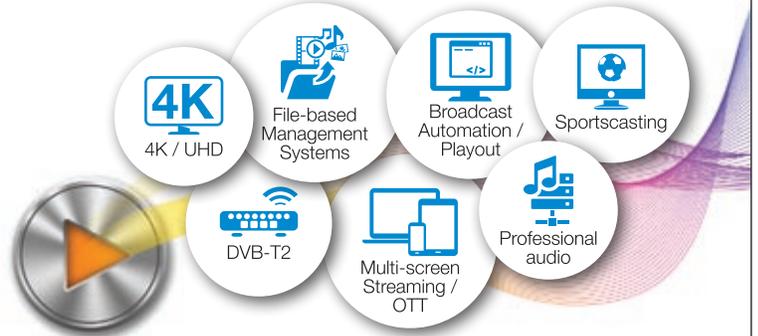


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New song for Star China

China's growing involvement in international content has been a strong theme of past MipTV/Mipcom markets. Formats are now following factual, with ITV Studios Global Entertainment picking up Star China's home-grown format, *Sing My Song*. Star China says this is the first singing talent show format from China to make it abroad.



Vivian Yin

The talent format involves new original songs performed by their creators. *Sing My Song* premiered in January 2014 on CCTV-3, which airs season two in September.

Star China's Vivian Yin calls China's pool of singer-songwriters "untapped" and says the format's strength is that it "does not blur the lines with confusing criteria". Celebrity singer-songwriters are judges and album producers for the series, which closes

with four new original albums.

Sing My Song follows Star China's success with *The Voice of China*. "We've accumulated enough experience to localise the

“ For a long period China was famous for rip-offs and plagiarism. Then we were famous for blindly grabbing formats from the rest of the world. *Sing My Song* is a landmark for us. ”

Vivian Yin, *Star China*

world's most famous formats in China. It's about time for us to be creative and involved in the international market in a different way," Yin says.

She's not pretending creating *Sing My Song* was easy. "We had more than 15 versions of the show... we wanted something unique," she says. Sponsorship, on the other hand, was a whole lot easier, she adds.

The challenge now is maintaining quality in the face of brutal competition and broadcaster demands for quick turnarounds. "Chinese broadcasters are less patient in terms of development than in the West," she says. Without the option of steady development, a pilot and testing, "we have to make sure everything is right before we launch". Star China worked on *Sing My Song* for nine months, with three months of intensive development before the show's debut on CCTV-3.

What does the ITV deal mean for Star China, once part of Rupert Murdoch's News Corp empire? "The Chinese role has always been as a buyer," Yin says. "For a long period China was famous for rip-offs and plagiarism. Then we were famous for blindly grabbing formats from the rest of the world. *Sing My Song* is a landmark for us," she adds.

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RTL Group, the leading European Entertainment Network, and CBS Studios International, the leading supplier of

programming to the international television marketplace, have partnered together and launched two pan Asian English language channels. The two channels broadcast in English and are subtitled into local languages. They will be distributed in up to 29 Asian markets including Hong Kong, Indonesia, Malaysia, the Philippines, Singapore, Taiwan, Thailand and Vietnam.

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- Able to work under pressure and meet tight deadlines.

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Who was at... HBO Asia's party at PCTA 2014 in Manila



Jonathan Spink, HBO Asia; Arnel Merilleno, Cablelink



Peter Yee, Cable Boss; Jacelyn Kek, HBO Asia; Pompeyo Abergas, Talavera Cable



Magdalene Ew, HBO Asia; Theresa Ong, Discovery; Edric Dy, Cable Boss



Victoriano Sy, Marbel Cable; Joel Dabao, Kabankalan Cable; Engr. Romy Zerrudo, Zenergy Cable



Steve Burton, HBO Asia



Ralph Caseño, Southern Cablevision



Vilia Chia, HBO Asia; Donnie Gonzales, MindShare



Jaja Suarez, Jon Arayata, Gidgette Faustino, Jude Pambid, SkyCable



Tim Bautista, Cable Boss; Avi Himatsinghani, Rewind Networks



Arlene Torres, Alan Supnet, SkyCable



Alvin Ebrada, James Dumlaog, Chie Yu, SkyCable



Bryan Krishnan, HBO Asia; Alvin Ebrada, Lito Mapolon, Jojo Javillionar, SkyCable



Danny Ang, HBO Asia; Mico Marco, SkyCable

ContentAsia's regular section, ContentAsia Formats, looks at formats and format development in Asia, including new seasons, series and trends and what these mean to channels, producers and the overall formats industry in the region.

The Genius Game

Social reality game show format, *The Genius Game*, is planning to return to CJ E&M's general entertainment channel tvN in the fourth quarter of 2014.

Developed by the tvN production team, *The Genius Game* features 13 players pitted against one another in a battle of wits over 12 episodes. This third season features 12 new strategic games.

Each episode includes a main match and a death match, with one player eliminated every week. The contestant with the lowest score in the main match is relegated to the death match, and must pick an opponent to compete against. The main match winner and his or her ally is exempt from selection. The winner of the death match takes the "garnet" (virtual currency) of his or her opponent, who is eliminated. The ultimate winner cashes in the garnets.

In past seasons, *The Genius Game* has invited a magician, poker champion, billiard player, pro-gamer, hacker, mathematician, news anchor, politician, music producer and K-pop idol star.

Targeting the 20-49 age group, the format was created during Korea's 2012 elections, says CJ E&M's Jin Woo Hwang, senior manager of content R&D.

The election meant that "in real life, people were witnessing the art of social relationship management every day. This is where we got the idea of creating a new type of social reality show,"



The Genius Game

Hwang says, describing the format as "an innovative hybrid genre show, which has the structure of a game show but consequences of a survival reality show." *The Genius Game's* distinguishing feature is "the unique demand on contestants to utilise their 'sociability' and 'wit' in order to win".

Ratings for the first two seasons were consistently high. Both seasons ranked number one in their prime-time slots among adults aged 20-49. Season one (26 April 2013 to 12 July 2013, Fridays 11.30pm-12.30am) had a 10.2% TV rating share. Season two (7 December 2013 to 22 February 2014, Saturdays at 10.50pm-11.50pm) had a 18.9% TV rating share (38% share in the male/female 20-30 years old age group). CJ E&M says season two recorded the highest ATS (Average Time Spent) with 42 minutes and 48 seconds,

among prime-time pay-TV programmes.

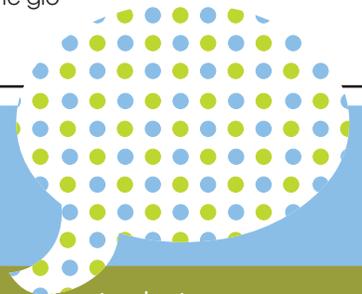
The greatest challenge was ensuring that these games presented the right level of difficulties for the contestants throughout the show.

The games were primarily inspired by board games, cartoons and social issues, and the format had the longest pre-production time for an entertainment show in Korea. Hwang says this was due to the need for attention to detail and uniqueness. "It was important to get the level of difficulty right so creator/producer Jeong Jong-Yeon ran multiple tests before creating each game and adjusted accordingly. After the initial testing, we held two simulations filming with college student volunteers," Hwang added.

The ultimate aim is to bring the programme to the global market.

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PlatformHulu Japan



In a regular section looking at online & OTT platforms in Asia, *Malena Amzah* speaks to Japanese broadcaster, Nippon TV, which has just bought Hulu Japan.

What is Hulu Japan? Hulu Japan is an online video service with unlimited access to over 13,000 premium programmes on multiple devices, including PCs, TVs, tablets, smartphones and gaming consoles. Premium content includes, but is not limited to, Hollywood films and TV shows, Japanese films and TV shows, anime and documentaries. Content is geo-blocked for Japan.

Launched in... September 2011 by Hulu, LLC out of the U.S. Hulu's Japan business was acquired by Nippon TV in 2014. Financial details were not disclosed.

Target users... In the past two and a half years, the main target has been fans of Hollywood films and television series. The plan is to include families, kids and other age groups by expanding content, including local programmes.

Subscribers/registered users... Not disclosed, but Hulu in Japan ended the 2013 fiscal year with more than double the number of subscribers from the beginning of the year

Rates... ¥933/US\$9 a month

Who's in charge Buddy Marini, chief executive officer of HJ Holdings, which operates the Hulu service in Japan

The offering... More than 13,000 assets of premium video content from Hollywood, Japan and other countries. Hulu added Nippon TV dramas and animation from 1 April 2014, and plans to add more. Content includes dramas such as *I'm Mita*, *Your Housekeeper*, *My Little Nightmare*; and animation series *La corda d'Oro – Blue Sky* and *The World is Still Beautiful*. There's no set number of new titles a month but the plan is to add more and more.

What rights do you buy... Varies from title to title, including first/exclusive content

Will Hulu live-stream Nippon TV? Under consideration, but no definite plan right now

Any major post-acquisition changes? The major change is adding Nippon TV's popular titles from 1 April this year.

The aim... Nippon TV hopes to "develop Hulu into the leading subscription video on demand (SVOD) platform in Japan, and that Hulu will become known not as 'Nippon TV's Hulu', but as 'Japan's Hulu' where users come to watch high-quality content when and where they want. In addition to terrestrial broadcasting and BS/CS broadcasting, Nippon TV will maximise content value by acquiring a path to deliver content through the internet, responding to users' preferences".

The biggest challenge... "Subscription VOD is still a new business model in Japan, where terrestrial television is free of charge and viewers are used to watching premium content for free. It is a challenge to get these television viewers to subscribe and pay a monthly fee for the content they watch. This has been a challenge so far and it is still a challenge."

Total number of internet-connected devices (tablet/smartphone/TV): 90 million devices (PCs not included)

Most-watched titles... "Hulu users watch various genres of content, not only Hollywood TV series and films, but also Japanese TV series, films and anime."

The biggest surprise on usage "It was not a surprise, but we are very happy that subscribers have been watching Hulu on multiple devices."

Social media Uses Twitter and Facebook

Priorities for the next six months... "High quality content is the key... [we] plan to add more content to the lineup for a wider range of users."

Interview production

Ng Say Yong
Managing Director, mm2 entertainment

Looking back, would you do anything different on your movie, *My Dog Dou Dou*? "First of all, I would have made the movie a comedy instead of drama. One of the hard lessons I learned in making *My Dog Dou Dou* is that most viewers go to the movies to be entertained, and they see comedy as entertainment, but not drama, unless it's spiced with big stars or action. And I would have used a comedic actor to play the lead role, someone like Mark Lee. Finally, I wouldn't call it *My Dog Dou Dou*. The original title, *Give Me Four Numbers*, would have been more appealing. There are lots of other things I would have done differently, but these are the main ones."

You said whether a movie can find an audience and make money depends on getting things right – "good story, strong characters, with professional technical and production values". Do you still feel the same way? "I do, because these are basic to cinematic storytelling. However, the moneymaking part is more complex and unpredictable. Even if we get the basics right – good story, strong characters, professional technical and production values – it doesn't mean a movie is guaranteed to make money. If that's so, we'd have mortgaged our houses and put all the money into our own movies and not needed to source outside investors. Timing is important, so are marketing and distribution. And of course, luck. Lots of it."

How can a film receive enough leverage and coverage within the region? "The most obvious and direct approach is to cast stars with regional appeal. They generate immediate recognition and interests from the regional media. But they don't

“Most viewers go to the movies to be entertained, and they see comedy as entertainment, but not drama unless it's spiced with big stars or action.”

come cheap. Participating in festivals also creates buzz and noise if the movie wins awards. However, they don't usually translate into box office performance. Finally, co-producing with regional players widens market focus, but that comes with its own challenges. At the end of the day, we need to network and build long-term relationships with regional players and partners. That's why mm2 maintains its presence by setting up regional offices and staying in close contact with our network of partners and friends."

Do collaborations with foreign filmmakers improve the export potential of local films? "Yes, but only if producers can overcome the many challenges that come with co-productions, such as budgetary discrepancies, linguistic and cultural differences, etc. mm2 has collaborated, and will continue to collaborate, with regional partners, but not necessarily only on local films. For example, we've participated in a China movie, *The Voice*, and will be shooting a movie in Hong Kong in June. We're always looking for different ways



to work with partners to break into the regional market."

What would you like to see more of in the future? "Obviously we'd like to see more and better movies made, not only for Singapore (which is limiting), but for the region and beyond. We'd like to see a significant upgrade in our talent pool – producers, directors, scriptwriters, musicians, storytellers, photographers, technical crew. Ultimately, we'd like to see Singapore movie-makers and companies soaring to make their presence felt in regional and international markets. That means not needing to restrict ourselves to making movies in Singapore alone, but utilising the best talent we can find, and making movies anywhere in the world."

** Ng Say Yong will be speaking at this year's Creative Content Production Conference, which runs in Singapore from 18-19 June alongside BroadcastAsia and CommunicAsia.*

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in media and telecoms can renew their consumer bonds in the context of both broadband and mobility as well as the vital traditional ecosystem," he added.

MPA's latest annual research report, which comes out at end May, shows the entire Asia-Pacific pay-TV ecosystem added 26 million net new customers in

“ Thailand is emerging as a major concern for the pay-TV ecosystem as leading platforms fail to execute and the growth of free TV and free satellite as well as the advent of DTT promises to reshape the entire television ecosystem. ”

Vivek Couto, Media Partners Asia (MPA)

2013, the lowest since 2007.

This reflects marked deceleration in China and India as well as softer growth in Southeast Asia (1.9 million net adds vs 3.7 million in 2013), especially Thailand, which was the big weak link in Southeast Asia.

Net new additions will accelerate in Asia Pacific over 2015-16, "largely due to some gains in India associated with the next, delayed phase of digitalisation but the general trend is one of deceleration," Couto says. Adjusted for multiple subscriptions, MPA analysis indicates that pay-TV penetration will grow from 52% in 2013 to 60% by 2018.

There will be upside in penetration in Indonesia but not as much as before as platforms continue to consolidate. "It's clear that the marketplace is now developing around three groups, with the market leader having 73% market share," Couto says, adding that there will also be significant growth in Malaysia.

Hong Kong, Singapore, Japan and Taiwan will be flat. Growth in Vietnam will be incremental. Australia's growth will largely be anchored to IPTV, as will China's.

In India, pay-TV homes will grow from 135 million in 2013 to 165 million by 2018 and 55% of pay-TV homes by 2018 will be digitised. At APOS, Star India head Uday Shankar, Videocon Group director Suarabh

Dhoot and Hathway director Viren Raheja will talk about how the industry maximises this from a revenue perspective.

MPA says platform profitability remains robust at Malaysia's dominant platform Astro, which generates the largest amount of free cash in Southeast Asia, while MNC Sky Vision is also gaining operating leverage and will turn free cash flow positive this year.

Three markets with significant deal activity over the next 12-24 months are Thailand, Korea and India.

Mobile and broadband will be an important catalyst to change, MPA says. 'TV everywhere' customers reached four million in 2013 and will

grow to 15 million by 2018 but in broadband total subs reached 575 million in 2013 and will swell to almost a billion by 2018.

MPA says this reflects the "huge role of mobile, which will have more than 50% market share". As a result, platforms and content providers will be also trying to figure out how to "move beyond authentication with a viable economic model without killing the golden goose – in other words embrace OTT as an aggressive measure without killing the pay-TV bundle".

"Much of APOS 2014 will be devoted how we as an industry capture the remaining 48% of TV homes that do not have pay-TV today. Much of that will mean confronting what we have not done as an industry in terms of execution, marketing (platforms/channels)... the reality of platform and channel consolidation will be discussed in mature markets and pan-Asia, as will the potential construction of wholesale channel bouquets between global groups to compete and balance the growing power of local platforms," Couto says.

At the same time, he adds that "channels that do not have compelling consumer proposition across linear and non-linear conversations, will not have a long-term future on the pay-TV dial in any of the key markets.

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