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Asia to top NBCUni non-linear biz in 2 years

10 SVOD destinations in Asia by end 2017

NBCUniversal will have signed 10 on-demand branded VOD destinations in Asia by the end of this year, doubling its profile in Asia's emerging non-linear environment. And that's just the beginning.

You'll find the whole story on page 5

Malaysia's Media Prima hits the road

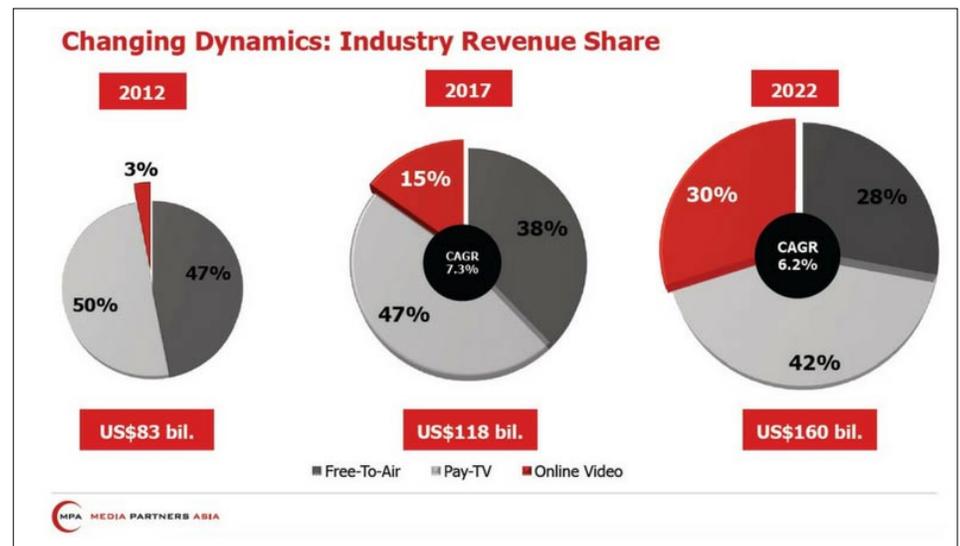
OTT platform tonton ventures into Singapore in first regional deal

Malaysian OTT platform tonton is going abroad for the first time in a deal with Singapore telco Singtel. Media Prima head Datuk Kamal Khalid talks about the media company's new outward face.

You'll find the whole story on page 3

Top takeouts from APOS 2017

Who said/thinks what & why in Bali this year...



This year's APOS (Asia Pacific Video Operators Summit) by Media Partners Asia (MPA) wrapped last Thursday with some messages that were louder than others and a clear sense that long-held truths are no longer true and that new rules are being made up day by day... These are our top nine.

MGs are Dead. Long Live Rev-share

Talk of minimum guarantees for content is a total passion killer for telcos, most of who are not shy about saying things like "never going to happen", "think again if that's your line", "let's talk revenue share" and variations of those.

The thread across the two-day event in Bali kicked off with Globe Telecom (Philippines) president and CEO, Ernest Cu.

"Everyone wants an MG," he said, adding: "We said maybe, but nowadays remember that we are all building a market

together. We have to work together and educate people on online streaming. We believe the market will turn.... MG [for content] is not the right model".

Indonesian telco Telkomsel's director/ chief marketing officer, Alistair Johnston, echoed the sentiment.

"The traditional model of subscription packages for content with a big MG, I really think this has to be revised," Johnston said, outlining the possibility of comingling products to allow subscribers to cherry-pick the content they want no matter where it comes from, and at the same time managing data.

"Indonesian subscribers are not going to have multiple subscriptions" to SVOD services, he added.

Telkomsel, which invests US\$1.2 billion a year in its network, offers monthly, weekly, daily, sachet and pay-per-use payment options.

Johnston outlined a model "that maximises the value of premium content" rather than one based on free content.

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Japan's NHK debuts pre-Olympics travel show



Host Kimie Oshima in RAKUxGO

Japanese public broadcaster NHK premieres one-off travel show RAKUxGO on 7 May at 8.10pm (Japan time) on its international 24-hour English-language TV service, NHK World TV.

The 28-minute one-off is part of the network's multi-year content strategy in the run up to the 2020 Tokyo Olympic/Paralympic Games.

NHK has chosen the Japanese traditional comic storytelling form, Rakugo, to frame this latest journey around Japan.

RAKUxGO may be turned into a series depending on viewer feedback, NHK said. The series is hosted by Rakugo performer/social linguist, Kimie Oshima, and international Rakugo performer, Kaishi Katsura.

IFA S'pore/China seal 4K wildlife co-pro

Singapore production house IFA Media has tied with China's CICC (China Intercontinental Communication Center), Xi'an Cloud Vision and Shenzhen Top Vision on 4K natural history series *Untamed China*. The ambitious multi-year agreement includes three theatrical-length 4K films: *Made in China*, *Tibet Roof Of The World* and *China's Secret Worlds* for multi-platform distribution in China and worldwide.

Media Prima's tonton hits the road OTT platform signs 1st regional deal with Singtel



From left: Anurag Dahiya, Singtel; Datuk Kamal Khalid, Media Prima; Goh Seow Eng, Singtel; and Airin Zainul, Media Prima

Malaysia's tonton has partnered with Singapore telco Singtel to launch the seven-year-old OTT platform on Singtel's Cast OTT video portal app in mid-May.

The deal gives tonton, owned by Malaysia's free-TV group Media Prima, its first exposure outside Malaysia.

Media Prima Television Networks (MPTN) chief executive officer, Datuk Kamal Khalid, said at the signing ceremony on the sidelines of APOS in Bali that the aim was to increase access to Malaysian content from outside of Malaysia.

The 33-year-old Media Prima, which launched tonton in 2010, has customised the content line-up and the user experience for Singapore.

Programming includes live events such as *Anugerah Bintang Popular Berita Harian* and dramas such as *Menanti Februari* and *Raisha* alongside other Malaysian dramas up to six months before TV broadcast and more.

At home, tonton has 6.8 million users, 80% of the content is local. The platform has not disclosed how many users have converted into subscribers.

tonton's ad-supported free platform complements Media Prima's core free-

TV business. The premium subscription service offers entertainment add-ons, such as original content and access to programmes up to six months before the free-TV premiere.

Khalid said tonton's shift to a subscription model in Malaysia was a major move. "Now we can do things that make perfect sense to an online audience that wouldn't sit comfortably on free to air," he said.

Initiatives include a movie collaboration with two of Malaysia's biggest YouTube stars. "This is a nice bridge between our core business and an audience that might not look at free-to-air as their primary vehicle," he added.

Another recent innovation is the addition of linear channel HITS, "which is bringing in a new audience... it has done fantastically well for us," Khalid said.

"Content is key," he added. "We don't have the multi billion dollars, so we have to be selective and surgical with the kinds of content we have".

Another key element is telco partnerships. "When we conclude a partnership with a telco we see a spike in the number of conversions," Khalid said.

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Asia to top NBCUni's non-linear biz in two years

10 SVOD destinations in Asia by end 2017, MacLellan says

NBCUniversal will have signed 10 on-demand branded VOD destinations in Asia by the end of this year, doubling its profile in Asia's emerging non-linear environment. And that's just the beginning.

"We are in the first inning of a nine-inning game," said Kevin MacLellan, NBCUniversal's chairman, global distribution and international, during Asia Pacific Video Operators' Summit (APOS) in Bali.

In the next two years, MacLellan said, Asia would become NBCUniversal's leading non-linear market in the world.

Even at 10 digital deals, MacLellan described the Asia business as "sizeable".

The existing five SVOD deals are in China (E! Zone on Alibaba); Japan (mobile-first versions of E! Zone and Studio Universal on Avex), Singapore (E! Zone on StarHub) and Malaysia (E! Zone on Astro). Details of the five new deals have not yet been announced.

NBCUni also operates one-year-old platform, Hayu, in Australia (and the U.K./Ireland). The all-reality service combines content on demand with social media and video/clip sharing functionality.

MacLellan says Hayu – offered as an app either alone or in partnership with platforms – has turned out to be a lot more profitable than expected. And then there's the learning and the data experience.

"It's the next generation and I think there's a lot of opportunity for that in Asia," he says.

Meanwhile, the strategy unveiled during APOS was three years in the making and includes the closure of two linear channel brands – Universal and Syfy – across the region by mid-2017. At the same time, the company is doubling down on its two strongest brands – Diva and E!.

MacLellan said the strategic decision was the result of listening to operators, who "don't want more, they want better..."



“Being a direct-to-consumer player is much more difficult than it seems.”

Kevin MacLellan

Chairman, Global Distribution and International, NBCUniversal

Our focus was the channels in which we can invest to go deeper with consumers on a digital or linear basis and [deciding which of] the channels we might have to sacrifice in order to pay for that," he said, adding that money saved from shutting the two channel was "reinvested in the brands that the operators really want".

The big picture driving the branded SVOD was to develop communities around themes and content genres and interests, and "we're well placed to do that," MacLellan said.

Internally, NBCUni has reworked teams on the ground in Asia to include new skills sets such as data analytics, and is integrating its learning from the streaming world into the company's evolving structure.

MacLellan said the pace of NBCUniversal's VOD rollout in Asia was much faster than in the rest of the world, where significant legacy businesses made it much more difficult to migrate.

Speaking on the sidelines of APOS, he said "the jump here seems like it's quicker than in other regions".

MacLellan himself has undergone his own shift, moving away from early disappointment at the size of the Asia market for NBCUniversal.

"I don't feel that way any more," he says. "It's very difficult today to protect those linear revenues and to convert... But it's what the affiliates want".

In other parts of the world, where pay-

TV penetration is much higher, affiliates are more focused on on-demand and are renewing their linear deals in order to secure those additional rights.

"In the U.S. and Europe, we are seeing increases in affiliate fees in exchange for extra rights," he said, adding that it was more cost effective to add SVOD rights to linear than to acquire standalone SVOD rights. "It's a smart move to defend their linear business," he says.

MacLellan also highlighted the technical challenges involved in rolling out VOD services.

"Being a direct-to-consumer player is much more difficult than it seems if you are looking at it from the outside as a content player," he said, describing Hayu as "a natural way for us to get smart".

The Hayu launch in three English-speaking markets – "with a potential global rollout" – was NBCUni "really just wanting to learn and in an inexpensive way. Taking all of that and putting it onto one site was a way to figure out how the consumer was going to respond, how were we going to behave as a video provider internationally... all those things that people don't really take into consideration," he said.

Not all the learning was painless. "The hardest tech delivery is the launch of an OTT service across numerous platforms at the same time. It's harder than any of the linear launches. People will tell you it's the same thing, but it's not".

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From page 1:

"Indonesia has 265 million people. Half of them have access to broadband devices in their palm of their hands. The vast majority of them are not paying a penny for content today. They are watching either pirated content or not watching video at all and I think there is an opportunity to bring great content to the market," Johnston said.



“MG is not the right model.”

Ernest Cu
President & Chief Executive Officer, Globe Telecom, Philippines

2

Our Blended Future

A blended future of no channels, no platforms, "just great content", as MPA executive director and co-founder,

Vivek Couto, said in his opening. "Everything is dissolving," Couto said.

Others have already stopped talking about channels. "We see the world moving to apps," said Andy Bird, Walt Disney International chairman, who has forbidden the use of the word 'channels'. "Channels of the future are playlists... curated playlists," he said.

Another kind of blending is happening elsewhere as platforms adopt more efficient two-way delivery technologies.

In Indonesia, MNC Group is merging as much of its Indovision DTH and MNC Play broadband subscriber base as it can, particularly in larger cities. MNC Group founder/president commissioner, Hary Tanoesoedibjo, said he was building up the group's IPTV business, with plans to pass two million broadband homes by the end of 2018, up from today's 1.2 million homes passed.

"Subscribers in big cities want pay-TV and high-speed internet connections," he said.

For all that though, free-to-air in Indonesia isn't expected to give up its lead for the next 10 years at least. "The market is still robust for free-to-air, and will be our main source of revenue for the next 10 years. But for pay TV, we need to combine DTH with broadband," Tanoesoedibjo added.

“

The power has gone to the consumer and it's never coming back.”



Brian Sullivan
President, Chief Operating Officer, Digital Consumer Group
FOX Networks Group

3

The Local Advantage

A major opportunity for Asian content as focus shifts towards enhancing and balancing the offering on regional SVOD/streaming services, the rise of local language online video platforms, and the effort by international brands to compete for local audiences.

Netflix's global head of business development, Bill Holmes, told delegates that "our goal over the next 10-20 years is how we can get smarter about programming tastes and how we can build the best product. What drives consumption is great content. We are increasingly focused on finding great local story tellers in Asia".

Even Turner's die-hard Hollywood general entertainment service, Warner TV, is going local. Has to be done, Turner International president, Gerhard Zeiler, said.

Hollywood content is still important for the region, but it's more important to go into local content," he told delegates.

Single brands, will still be important in the future, "but they have to be relevant.

What is not relevant are channels that you sell to distributors that no one really wants to watch. It's must have or no have," Zeiler said.

Some who have dabbled in local TV production in the past with varying degrees of success and more than a little frustration are pivoting and trying again.

Walt Disney International chairman, Andy Bird, said the company's decision to exit movie production in India last year had been "misinterpreted". Rather, he said, Disney saw a greater opportunity to take its story in a different direction.

"The real story was the economics of the Indian cinema industry weren't catching up. I wanted to pivot the business slightly," Bird said, outlining an aggressive positioning to ride the "explosion of new opportunities".

12 projects are currently in development by Disney's India team.

Newbies to the world of Asian content are not saying anything local media companies haven't known and/or practiced for years.

MNC Group's Hary Tanoesoedibjo said production across MNC's free-to-air and pay-TV businesses was "almost 100%" lo-

cal and in-house. This gives MNC a cross-platform rights/IP advantage.

Further out but not that far behind, are telcos who didn't necessarily envision life as a content creator but who realise the advantages of a more active role in the space.

"There's no reason Telkomsel can't be the one that's out there producing the compelling TV shows and movies that customers want, so we think there's an opportunity," Alistair Johnston said, adding: "Our future and our core business is data but we are looking at a number of adjacent categories where we can add value".

4

What's Working... & What's Not

Long-tail content seems to have had its day, although box-sets to back up the release of new returning series are still hot.

"What drives repeat usage is the fresh-est content and the biggest stars," Telkomsel's Alistair Johnston said.

"We see that in Viu, which does a great job of bringing the latest Korean shows to the platform on the same day that they air in Korea".

Original content also drives loyalty.

Pan-Asian content, on the other hand, doesn't necessarily work in Indonesia. "There is a big opportunity for Indonesian-language and Indonesian-based content, which is very underserved," Johnston said.

5

The Rise of On-demand Destinations

The emergence of a new generation of branded on-demand destinations where consumers know exactly what they're getting and can get it easily whenever (or that's the idea, at least).

FOX+ is the new darling in this streaming space, BBC Player remains committed to its journey, and NBCUniversal is the



All of us from the curated channels business have to balance investment in direct-to-consumer businesses with our core legacy businesses."

Gerhard Zeiler
President, Turner International



The rise of local-language online video platforms has just commenced."

Vivek Couto
Executive Director & Co-founder, Media Partners Asia (MPA)

shiny new posterchild for focusing on its strengths and assets in creating on-demand destinations for platforms in Asia.

By the end of this year, NBCUniversal will have launched on-demand products with 10 partners in Asia, said NBCUniversal chairman, global distribution and international, Kevin MacLellan.

We know about five of these, including Japan and China, at the moment. Five are yet to be announced.

What none of the established entertainment brands are talking about right now – with the exception of Turner international president, Gerhard Zeiler – is breaking free of existing subscription partner platforms.

Zeiler believes strongly in building direct-to-consumer angles.

The direct-to-consumer future, he said, "will not only be for the big streaming players. All of us who come from the curated channels business... we have to balance investment in direct-to-consumer businesses with our core legacy business. We will fail if in two to three years time we don't have a B2C kids business".

6

SVOD – An Unclear Path to Profitability

And talking about the great new sexy stand-alone streamers of our time, another constant refrain through APOS was their unclear path to true profitability.

Clearly not a problem for them right now, but, say others/rivals under pressure not to decimate legacy businesses, the model is unsustainable and they're so not going there.

MPA executive director and co-founder, Vivek Couto, talked about a "hard reset" for SVOD players, with churn at 70% in year two, dropping to 60% in year three.

Couto outlined three possible revenue SVOD models: stand-alone, an integrated ecosystem, and partnerships that would mimic the pay-TV model.

"Business and revenue models for on-line video are evolving at a rapid pace, heightened levels of cash burn are a concern and the path to profitability remains unclear," he said.

Meanwhile, regional players iflix, Netflix, Viu, Amazon Prime Video and HOOQ, along with regional newbie tonton, have found a happy home at APOS on and off stage. And long may it last.

7 Hallyu Alive & Well, Despite This Year's China Freeze

Korean programming and production (and on the sidelines talk of Netflix spending a rumoured US\$130 million on Korean content).

Netflix wouldn't confirm that, but there's little doubt anywhere that they're determined to make Korean shows fly.

Four major Korean content trends led the discussion: Korean dramas for domestic audiences on both free-TV and cable; Korean dramas that appeal to Western audiences but may not do that well in Korea, which is where Warner-owned DramaFever is flourishing; high-concept, potentially breakthrough dramas, such as Astory's epic historical zombie thriller *Kingdom* for Netflix; and remakes of Korean dramas in various parts of the world. There are also expectations that China's hardline ban against all things Korean will ease next year and at least some of the mainland business will return.

8 Think Consumer First

Consumer-first thinking (and, on the sidelines of the main stage discussions, how incredibly difficult that is to execute well on multiple levels).

FOX Networks Group's president/COO, digital consumer group, Brian Sullivan, talked about presenting an aggregated content experience, and taking the burden of finding content off the consumer.

"There's never been more content but finding it is a nightmare," Sullivan told APOS delegates, predicting that many of platforms we are seeing now "won't be around in three to five years" but there's a huge amount of experimenta-

"I've forbidden the use of the word 'channel'... the future is about curated playlists."



Andy Bird
Chairman, Walt Disney International



"The customer experience in Indonesia is better if you view pirate content... between the telcos, platforms & content operators, we have to figure out a way to create a more compelling customer experience."

Alistair Johnston
Director, Chief Marketing Officer, Telkomsel, Indonesia

tion and learning.

"The power has gone to the consumer and it's never coming back," he said.

With the old model broken, the new ecosystem emerging involves digital (or virtual) MVPDs which are "delivering a great digital experience live and on-demand, usually mobile first, at great pricing.... I don't see them disappearing."

But, he stressed, getting the commercial balance is critical or there won't be any content...

Telkomsel's Alistair Johnston said the telco had been led in a direction it didn't necessarily anticipate going in order to create a compelling customer experience. "To some extent we feared the technical challenges [of offering an integrated product]. It's not straightforward. But ultimately we are led by the customer experience".

"The customer experience is better in Indonesia if you view pirate content than if you view official content because trying to find out which provider has the movie or series you want to see, and then trying to find out a way to subscribe to that and manage the subscription is

not easy. On the black market, however, there are lots of other solutions. That's a mistake we've all made.

"Between the telcos and the platforms and the content operators, we have to figure out a way to create a more compelling customer experience," Johnston added.

Even traditional pay-TV players are angling for the simplest path possible between consumer and product. MNC Group's Hary Tanoesoedibjo said he had slashed pay-TV platform Indovision's basic packages to four or five. "It was too confusing before... Now it's much simpler," Tanoesoedibjo said.

9 Welcome to the Giant Learning Curve

The giant learning curve involved for everyone, big and small, across every sector and all relationships.

"We've been on a journey of learning and understanding and exploration," Walt Disney International chairman, Andy Bird, said.

The Big Influence is...

ContentAsia asks industry bosses about the one thing they think will make the most difference to the content industry this year.

<p>“In the new golden age of TV, there is an increasing demand for content that pushes the limits of creativity.”</p> <p>Mark Britt Co-founder and Group CEO, iflix</p>	 	<p>“Emerging regional or local productions for VOD platforms.”</p> <p>Daphne Yang Chief Executive Officer CATCHPLAY</p>	
	<p>“As multi-platform content are growing all over the world, we need to create such cross-platform content to specially accommodate our viewers in this very region.”</p> <p>Varavuth Jentanakul Chairman & CEO Zense Entertainment (Thailand)</p>	<p>“It is not simply providing thousands of hours of content in an on demand platform, but providing a unique experience to each and every consumer.”</p> <p>Francis Gerard R. Tupaz Assistant Vice President of Digital Media, SMLEI (Philippines)</p>	
<p>“The emergence of digital channels bringing new opportunities and new platforms”</p> <p>Avi Armoza Chief Executive Officer Armoza Formats</p>	 	<p>“We expect more premium OTT on demand streaming options for consumers as content providers capitalise on changing consumption patterns given higher smartphone adoption data commoditisation.”</p> <p>Jil Bausa-Go VP for Content, Globe Telecom (Philippines)</p>	
	<p>“In this tough and challenging year for TV industry in Thailand, my goal is still to create the best premium content. Because I surely believe QUALITY sells.”</p> <p>Kitikorn Penrote CEO, Heliconia H Group (Thailand)</p>	<p>“Integrated Video Platform (IVP) solutions will change the way we build sustainable video businesses. From production to monetisation, IVP solutions can better tackle the new demands placed on content providers today.”</p> <p>Steve Davis General Manager of Asia-Pacific Ooyala</p>	

China

For all the billions going into China media, local platforms reign breathtakingly supreme, foreign channel distribution remains choked, the original production goalposts have shifted to favour domestic IP ownership, and the syndication/licensing business races forward and comes to a screeching halt in turns. And then there's the hard-line stand against all things Korean in the wake of Korea's deployment of the U.S.-backed THAAD missile defence system.

Will this change in 2017? Unlikely, although anything could happen. What seems certain is that almost four months into his presidency, Donald Trump isn't picking the kind of fights with China that he promised to do in his campaign.

Less certain is China's position on Korean entertainment, but hopes in Korea are that the market (and its ability to pay upwards of US\$400,000 – some say up to a million – for one episode of Korean drama) will open up in 2018.

Meanwhile, co-development efforts between local Chinese entities and outside media brands are in full swing, and formats rights owners continue trying to figure out how to operate in a market where rules dictate that the domestic partner owns all IP outright.

The prevailing sentiment on syndication within China is take whatever money you can get today because who knows what the environment will look like tomorrow.

IHS Technology's World TV Production Report 2016 estimates China's investment in programming in 2015 at US\$8.4 billion, making it the second largest market in Asia Pacific behind Japan, which leads at US\$9.8 billion.



Lip Sync Battle China

As was the situation a year ago, powerful streaming platforms – including Alibaba and its Tmall Box SVOD service, Youku Tudou, Tencent Video, Baidu/iQiyi, PPTV and Sohu, plus the Shanghai Media Group's BesTV – continue to provide the biggest opportunity for regional/international rights owners in China.

Through 2016 and the first quarter of 2017, China stood out as the only country in Asia (other than North Korea) that U.S. streaming service Netflix chose not to include in its global roll out. Why? Because, even as bold and bolshy as Netflix is, it didn't dare go there without more streaming ducks in a row than it had. And, 16 months later, still has.

In the absence of any other way in, Netflix has chosen a licensing model that will put originals such as *Black Mirror*, *Mindhunter*, *Stranger Things*, *BoJack*

Horseman and *Ultimate Beastmaster* onto mainland Chinese platform iQiyi. The broad-ranging licensing deal that covers drama, animation, documentary and reality titles. iQiyi says that new seasons of *Black Mirror* and *Stranger Things* are expected to be released in China at the same time as on Netflix around the world. New drama *Mindhunter* will also release simultaneously, iQiyi said.

There's no indication at all that mainland media authorities are easing up on content requirements. On the contrary, all things point to an ongoing determination to promote 'healthy and orderly' development.

Meanwhile, the crazy that characterised China's acquisitive spree in Hollywood has subsided, wracked by, among other issues, regulatory scrutiny and tight currency controls.

Adapted from ContentAsia's The Big List 2017

Who's who in China...

Broadcasters

Beijing Gehua CATV Network

Beijing Gehua CATV Network, established in 1999, offers a triple-play service consisting of cable TV, broadband internet and telephone to more than 5.6 million registered cable TV/HD interactive digital TV users and 385,000 broadband subscribers.

Beijing TV

Founded in 1979, Beijing TV (BTV) now owns 13 channels, with total reach of about 300 million audiences nationwide. BTV operates both cable free TV and pay TV services. The company also does content production of TV drama, animation, news, TV magazine, documentary, sports and training programmes. In total, BTV produces about 15,000 hours a year.

China Central Television (CCTV)

Founded in 1958, China Central Television (CCTV) is mainland China's state-controlled national TV broadcaster, offering over 50 channels (free-TV/digital pay-TV) and delivering a total of about 529 TV programmes or about 338,000 hours, to more than 1.1 billion viewers across China (April 2017). CCTV channels and content offer a wide-ranging mix of genres, including news, factual, drama, reality, comedy and variety. Content is mostly local, interspersed with local versions of international formats and foreign acquisitions. CCTV is also involved in content exchange/co-production projects with foreign broadcasters such as India's Doordarshan. In addition to its television businesses, CCTV operates content distribution unit, China International Television Corporation (CITVC), webcast service platform, China Network Television (CNTV) and online TV division Future TV.

Guangdong Cable TV Network

Guangdong Cable TV Network (GDCATV), owned by the Guangdong provincial government, is a cable TV and internet broadband network servicing more than 900,000 subscribers in the Guangzhou province of China.

Hunan Broadcasting System

Established in 1970 as Golden Eagle Broadcasting System, state-owned Hunan Broadcasting System (HBS) operates various television channels in China, including Hunan Satellite TV, a 24-hour general entertain-



The Brain China

ment channel. Hunan Satellite TV airs mostly local content, ranging from variety shows to movies, animation and game shows. Hunan, a major buyer of international rights, has produced legal local versions of *The X Factor*, *Your Face Sounds Familiar*, *The Winner Is*, *I'm A Singer*, *Strictly Come Dancing*, *Just the Two of Us* and *Saturday Night Takeaway*, among others. Hunan's vibrant original content slate includes shows like *Happy Camp*, *Day Day Up*, *Super Girl/Boy*. The broadcaster claims a daily average 100 million+ viewers. The network also operates Hunan IPTV, offering live TV broadcasts, playback and VOD services to households in Hunan Province. Hunan TV's online content includes Mango Internet TV and a fee-based value-add mobile app (extension of Mango TV), which carries HBS content, animation, music and audio magazines, among others, via three telco operators – China Mobile, Telecom and China Unicom.

Jiangsu Broadcasting Corp

Established in June 2001, Jiangsu Broadcasting Corporation (JSBC) serves households in Jiangsu province. Jiangsu Broadcasting owns and operates 16 TV channels, including two satellite, seven terrestrial television, four digital pay-TV and mobile TV channels. JSBC is also one of China's active international formats buyers having aired *The Brain China*, *I Can See Your Voice China*, *The Remix China* and *Still Standing China* in 2016/7 on Jiangsu Satel-

lite Channel. JSBC is also involved in content production, movie distribution, home shopping and online gaming.

Shanghai Media Group (SMG)

Shanghai Media Group (SMG) is one of China's largest media and entertainment companies, boasting a portfolio spanning traditional TV, radio, newspapers/magazines, TV/film production/distribution, OTT/IPTV, online/console gaming, digital advertising, TV shopping/e-commerce; live entertainment and tourism. SMG operates 15 cable/satellite TV networks (including documentary channel Docu TV, kids channel Toonmax and Dragon TV), 15 subscription-based digital pay TV channels, 13 radio frequencies, eight newspapers, magazines and landmark properties, including the Oriental Pearl TV Tower.

Shenzhen Media Group

Shenzhen Media Group owns/operates 12 TV channels and four radio stations in China, including Shenzhen Satellite Television, which has bought the formats rights to Endemol Shine's real life thriller format *Hunted* in 2016.

Sichuan Radio and Television

Sichuan government-owned network Sichuan Radio and Television (SRT) was established in May 1960 and started broadcasting nationwide in August 2003. The broadcaster operates 11 satellite TV channels and eight radio stations.

Southern Media Corporation

Southern Media Corporation (SMC) is a wholly owned operating subsidiary of Guangdong Television Station (GDTV). SMC's primary businesses include cable network television, media operations, advertising, digital distribution, new media, content marketing, cable network support, TV content production, digital magazine publication and related activities. SMC is made up of Radio Guangdong, Guangdong TV, Southern TV, Radio and Television Technical Center of Guangdong Province, Guangdong Cable Radio and Television Network Inc, which consists of 19 city-level TV stations and 76 county-level TV stations. SMC was established in January 2004 by the merger between GDTV and Southern Television (TVS).

Zhejiang Radio & TV Group

China's provincial broadcaster, Zhejiang Radio and Television Group (ZRTG) was established in November 2001 and billed itself as the top three broadcaster operating in Zhejiang province. The network owns and operates 12 TV channels and seven radio stations, and produces original/localised content and live events for both regional and national audiences. ZRTG is mostly known for its flagship reality talent show *Sing! China* (the evolution of *The Voice of China* after an ugly struggle over the format and the Chinese name/characters), *China Dream* and *Hurry up, Brother*. ZRTG owns a large-scale film/TV media centre dedicated to traditional and new media television/video production.

Online/OTT

BesTV

BesTV offers about 500,000 hours (including 100,000 hours in HD) of local and international shows to more than 26 million subscribers. Launched in 2005, BesTV is owned and operated by Shanghai Media Group's media entertainment subsidiary Shanghai Oriental Pearl Group.

Bilibili

Millennial-targeted digital platform Bilibili (aka B Station) offers online streaming of UGC and acquired local/international shows, including anime, music, drama series, games, entertainment, movies and factual (travel, nature, food) content. Bilibili features real-time commentary subtitle system that displays users' comments while watching. Monthly subscriptions cost RMB25/US\$3.60. Launched in June 2009, Bilibili has over 100

million active users (among which 67.5% are aged under 24) and 100+ million daily video views (November 2016).

China Blue TV

Launched in July 2015, China Blue TV is the internet video platform of Zhejiang Radio & TV group. The platform offers original web series and select content from the group's free-TV channel Zhejiang TV, a satellite broadcast station serving viewers in Hangzhou, Zhejiang. China Blue TV has up to 10 million subscribers (September 2016).

China Network Television (CNTV)

China Network Television (CNTV) is a national web-based TV broadcaster launched in December 2009 by China Central Television (CCTV). CNTV's online news portal, CCTV.com, carries local and international news, live/on-demand video content and searchable archives in multiple languages, including French, Russian, Korean and Chinese ethnic minority languages).

iQiyi

Founded in April 2010, iQiyi is an online/streaming platform offering local/international/in-house titles, including movies and TV drama, via advertising-supported video on demand (AVOD), subscription video on demand (SVOD) and transactional video on demand (TVOD), to over 120 million active users (Feb 2017). iQiyi claimed over 20 million paid subs in June 2016. Subscriptions cost RMB19.80/US\$3 a month or RMB198/US\$30 a year. iQiyi has budgeted at least RMB100 billion/US\$14 billion for new content, including original shows, in 2017. iQiyi is owned by Chinese web service, Baidu.

LeEco/Le Sports

Founded in November 2004, LeEco offers 100,000+ TV drama episodes; 5,000+ movie titles; and sports properties UEFA Champions League and F1. LeVIP Premium costs RMB42/US\$6.45 a month or RMB490/US\$75 a year. LeVIP Lite costs RMB18/US\$2.80 a month or RMB198/US\$30 a year. The group continues with its aim to become a media platform offering hardware, software and everything in between, as well as electric cars.

Mango TV

Hunan Broadcasting System launched OTT platform Mango TV in 2011, offering about 92 SD and 12 HD channels, as well as 280,000+ VOD content (130,000+ hours) of films, movies, TV dramas, variety shows, documentaries and animation for free to more than eight million subscribers in China.

PPTV

Launched in 2005, online TV service PPTV offers more than 300,000 hours of local/international content, including drama, movies, sports, entertainment and news via live streaming and on-demand to 450+ million users. The line-up also covers live events, including talent show *Super Girl* and original online content, in cooperation with other media groups and studios in China. PPTV is free with some pay options.

Sohu Video

Online platform Sohu.com provides a network of web properties and community based/web 2.0 products. Sohu's content platform, Sohu Video (tv.sohu.com), offers free access to most content, including local/international drama series, variety shows, original productions, news, documentaries, animation, entertainment, live TV and user-generated content. Premium content is mostly movies and educational. Sohu Video is available on the go via mobile video site and mobile video app. Premium plans cost from RMB30/US\$4.60 a month to RMB360/US\$55 for 12 months. Sohu was incorporated in 1996 as Internet Technologies China and renamed Sohu.com in 1999. The OTT priorities for 2017 include shifting more resources to self-produced content.

Tmall Box Office (TBO)

Online/mobile commerce giant Alibaba rolled out TBO, a subscription-based video-streaming service in China, in September 2015. TBO is delivered via set-top box and smart TV devices, offering in-house and local/foreign content, including a strong slate of Hollywood titles and related entertainment content. The service costs RMB39/US\$6 a month for unlimited viewing or RMB365/US\$55 for 12 months. The Alibaba group was founded in 1999 by 18 people led by Jack Ma, a former English teacher based in Hangzhou, China.

Tencent Video

Tencent Video is part of a multi-faceted online business offering gaming, video, e-commerce and social apps (QQ, WeChat). Tencent Video delivers local/international content, including films, TV shows, formats, original productions, sports events and news. Premium content is behind a subscription paywall. Subscription costs RMB30/US\$4.40 a month or RMB298/US\$44 a year for VIP membership. Tencent Video's total activated terminals (including TV and set-top box) is 90+ million. Average daily active terminals is 10+ million. The

service's highest daily viewership reaches over 0.14 billion (Oct 2016, source: Tencent). Tencent was founded in Shenzhen in 1998 and listed on the Hong Kong Stock Exchange in 2004.

Wasu

Launched in 2003, Wasu is an online video platform offering live TV channels and local/international VOD content to about 20+ million subscribers. The VOD library includes 30,000 drama episodes, 3,000 movies and 25,000 episodes of animation and documentary series. VIP pack costs RMB40/US\$6 a month. Wasu is owned and managed by Wasu Digital TV Media Holdings, an investment by the Hangzhou Culture, Radio and Television Group and the Zhejiang Radio and Television Group. The Wasu group is China's media powerhouse, with growing scale across digital cable TV, OTT and internet TV. It also owns 42% of national cable company China Cable Network.

Wecast

Launched in 2010 in Beijing, Wecast (known as YOU On Demand until December 2016) is a multi-platform company delivering, among other entertainment, Hollywood movie titles, to customers across China via subscription and transactional streaming services. Services are offered across multiple platforms and devices such as Xiaomi OTT set-top box, Huawei smartphone, OTT Domy Box and Southern Media Corporation's 3GTV mobile video platform. Wecast, with global expansion ambitions, is run out of New York and Beijing.

Xiangchao Kankan

Video streaming platform Xiangchao Kankan was known as Xunlei Kankan until August 2015 after it was acquired by Beijing Neosound International Media for RMB130 million/US\$20 million from former owner Xunlei Limited in mid 2015. Xiangchao Kankan carries local and international content from over 200 partners. It has monthly users of 150 million (12 million daily users) and average daily video views of 70 million. Subscription costs RMB150/US\$22 yearly.

Youku

China's digital entertainment platform Youku Business Division (Youku BD), which is a part of Alibaba Digital Media & Entertainment group, was formed by the merger of Youku, Tudou and Alibaba home entertainment business unit in October 2016. Youku's businesses span PC, TV and mobile. Content offerings include copyrighted, co-pro-

duced, in-house, UGC/PGC (user/professionally generated content), live webcast and VR (virtual reality). Youku also has interests in gaming, smart hardware, marketing and merchandising, among others. Youku offers about 3,000 television drama titles, 7,000+ movies, 540+ variety shows, as well as current events, music videos, UGC and in-house/original productions. International/regional content partners include Warner Bros, Twentieth Century Fox Home Entertainment, m1905.com (online movie site wholly owned by China Central Television), Hong Kong TVB, NBCUniversal and Sony Pictures Television. Youku serves approximately 580 million monthly unique devices and an average of 1.1 billion daily mobile views (April 2017).

Production

Beijing Hualu Baina Film & TV

Established in 2002, Beijing Hualu Baina Film & TV (HBN) is an entertainment company specialising in film/TV planning, production, distribution and licensing.

Cenic Media

Cenic Media specialises in the production, distribution and investment of content in the China market. The aim is to become an ideal partner of global drama/formats producers and media platforms. Cenic Media's production credits included the Chinese remake of Warner Bros' American sitcom *2 Broke Girls*.

China Huace Film & TV

Established in 2005, China Huace Film & TV is a media group primarily focused on film/TV production and distribution, with an annual output of over 1,000 episodes of TV drama, dozens of films and over ten variety shows. In all, the group holds 10,000+ hours of film/TV in its library (Dec 2016). The group also consists of over 20 subsidiaries (including Croton Media) and has made strategic alliances and investments into areas such as a film studio, cinema theatres, advertising/artist agencies and online game developers.

China Intercontinental Communication Center (CICC)

China Intercontinental Communication Center (CICC) is an international media institution established in 1993 dedicated to international cultural exchange through co-production, promotion and publishing of film, TV and new media. CICC specialises

in documentary production covering Chinese nature, history and culture. Production partners include the Chinese state-owned organisations, as well as more than 40 international companies and broadcasters.

Ciwen

Ciwen Media Group produces and distributes TV, film and animation in China. The company's kids and rights division is responsible for original content creation, production, distribution, brand management, and licensing and merchandising animated properties and characters from around the globe.

Endemol Shine China

Endemol Shine in China is engaged in developing and co-developing formats, providing production services, exploiting IP and promoting Chinese content abroad. The group has been active in China since 2005, working with local partners including broadcasters and digital platforms.

Enlight TV Production

Enlight TV Production/Beijing Enlight Media specialises in the production of TV content in China, and is also involved in film distribution. Production genres include TV drama, formats, news, variety and lifestyle.

Fantawild Animation

Fantawild Animation Inc (FAI) specialises in original animation design and production. Globally, the company has distributed its programmes to over 100 countries via TV networks such as Disney and Sony as well as Netflix. Known mostly for its TV animation series *Boonie Bears*, Fantawild Animation is a part of the Fantawild Holding, a subsidiary of Cultural and Technology in China.

FremantleMedia China

FremantleMedia in China creates, produces and distributes content in the country across traditional TV and digital platforms. 2016's titles included dating show *Date With Fate China* (aired on iQiyi) and game shows *Don't Stop Me Now China* (CCTV1) and *Let's Get Gold China* (CCTV3).

Huayi Brothers Media

Huayi Brothers Media Corporation is one of China's dominant media and entertainment companies. Founded in 1994 by the Wang brothers, the company began with feature film production and distribution, and has since expanded into television production, talent management, cinema, music, new media, gaming and theme parks.

IPCN (International Program Content Network)

Established in 2007, Shanghai-based International Program Content Network (IPCN) specialises in the acquisition and distribution of format rights to China/Asia-Pacific. The company has brokered more than 35 deals or about 5,000 hours of international TV for the Chinese market in original and localised versions. Production projects in 2016/7 include *Dragons' Den China*, *China's Next Top Model S3*, *The Remix China* and *Supernanny China S4*.

Sony Pictures Entertainment China

Sony Pictures Entertainment's production outfit in China (formerly known as Huaso Film and TV Digital Production) was co-founded by China Film Group Corporation and Sony Pictures Entertainment in 2004. In 2011, China Film Group shifted its shares to CCTV6 movie channel and the Beijing-based production house became a joint venture company owned by CCTV6 and Sony Pictures.

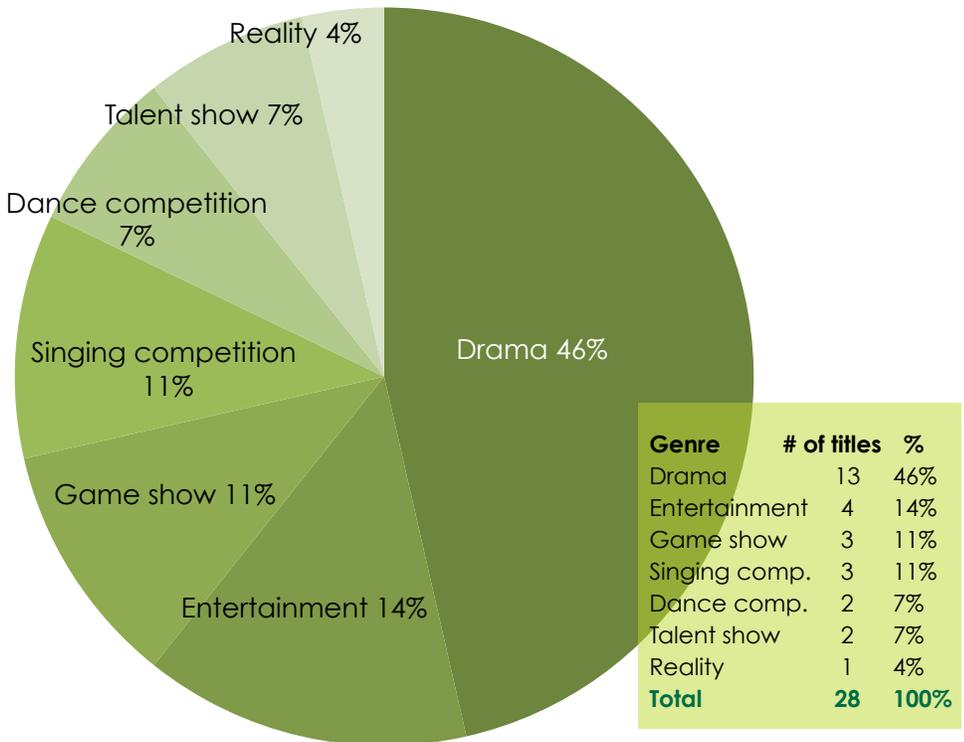
Star China International Media

Star China International Media (Star China) specialises in TV production (Canxing Production/Starry Production), broadcasting (Xing Kong China, Xing Kong International Channel and Channel [V] China), filmmaking, artist management and music/concert production. Production subsidiary, Canxing/Starry, produces local adaptations of international formats, including *Infinite Challenge China*, *The Remix China*, *So You Think You Can Dance* and *The King of Mask Singer*. Star China's original formats include native Chinese format *Sing My Song* and *Sing! China*, the evolution of *The Voice of China* after an ugly struggle over the format and the Chinese name/characters in 2016. Broadcast partners include CCTV, Dragon TV, Zhejiang Satellite TV, Jiangsu Satellite TV and Beijing Satellite TV. Star China was established in August 2010 as a joint venture between Chinese Media Capital (CMC) and 21st Century Fox. In January 2014, CMC acquired 20th Century Fox's 47% stake to become sole owner.

Tangren Media

Tangren Media specialises in the production of TV dramas, 3D animation and movies, and is involved in distribution, publishing and talent management. The company was incorporated in 2012.

China's Q1 2017 formats by genre



Source: ContentAsia's Formats Outlook, Q1 2017

UYoung Culture & Media

Launched in 2000 and headquartered in Beijing, UYoung produces, distributes and licenses animated kids' content across all platforms. The company also creates its own preschool consumer product lines and runs strategic media operations across a number of Chinese kids' channels.

Zhejiang Versatile Media

Hangzhou-based Zhejiang Versatile Media launched in 1993 as Hangzhou Versatile Advertising and is an integrated media company involved in film/TV, animation, advertising, internet and mobile services.

Zhejiang Zhongnan Animation

Established in 2003, Zhejiang Zhongnan Animation (Zoland Animation) specialises in original animation production. Titles – both original animation series and films, with an aggregate length of approximately 80,000 minutes – have been broadcast in about 90 countries and regions, including the U.S., Europe, Japan and Africa (Dec 2016). The

company is also involved in drama/live-action films, global distribution of content, publishing and licensing.

Government/Regulator

State Administration of Press, Publication, Radio, Film and Television of the People's Republic of China (SAPPRFT)

The State Administration of Press, Publication, Radio, Film and Television of the People's Republic of China (SAPPRFT) oversees state-owned television, radio, film and publications enterprises. The body directly controls state-owned media, including China Central Television (CCTV), China National Radio, China Radio International. SAPPRFT is also responsible for policing China's censorship rules.

Adapted from ContentAsia's The Big List 2017

Be included! Please send your details to Malena at malena@contentasia.tv or +65 6846 5982

What's on where...

ContentAsia's list of events for the rest of the year.

When		Event	Venue
May 2017	10-12	Busan Contents Market, BCM	Busan, South Korea
	16-24	L.A. Screenings	Los Angeles, U.S.
	17-18	PromaxBDA India	Mumbai, India
	22	CASBAA Satellite Industry Forum	Singapore
	23-25	BroadcastAsia	Singapore
	23-25	CommunicAsia	Singapore
	23-25	MIP China Hangzhou	Hangzhou, China
June 2017	8-10	Vietnam Telefilm	Ho Chi Minh City, Vietnam
	28-30	Content Tokyo	Tokyo, Japan
August 2017	30 Aug-1-Sep	BCWW	Seoul, South Korea
September 2017	6	ContentAsia Production	Singapore
	7-8	ContentAsia Summit	Singapore
October 2017	10-12	APSCC	Tokyo, Japan
	14-15	MIP Junior	Cannes, France
	16-19	MIPCOM	Cannes, France
	25 Oct-3 Nov	TIFFCOM	Tokyo, Japan
November 2017	6-9	CASBAA Convention	Macau
	29 Nov-1 Dec	Asia TV Forum & Market (ATF)	Singapore
	29 Nov-1 Dec	Asian Animation Summit	Brisbane, Australia
	30 Nov-1 Dec	PromaxBDA Asia	Singapore
December 2017	12-14	CineAsia	Hong Kong
January 2018	11-12	vdontx asia	Mumbai, India
	16-18	NATPE	U.S.
April 2018	7-8	MIP Doc	Cannes, France
	7-8	MIP Formats	Cannes, France
	9-12	MIP TV	Cannes, France

Anime/manga dominates in Japan

Netflix killing it in Japan, Parrot Analytics shows

Netflix dominates the top 10 list of on-line/SVOD originals in Japan, where global streaming giants Netflix and Amazon Prime Video are slugging it out for supremacy.

The sole Amazon original title creating any kind of buzz on Parrot Analytics' digital originals list is *The Grand Tour*, which came in third behind two Marvel titles – *Marvel's Iron Fist* and *Marvel's Luke Cage*.

Domestic manga/anime titles dominate the overall list, with 60% of the titles,

although *The Walking Dead* beats out most local productions by a long way.

The only series to come close to *The Walking Dead* is Hajime Isayama's post-apocalyptic fantasy series *Attack on Titan*.

Despite the buzz of the movie release date at the end of July this year and much speculation over the series eagerly awaited return for a third season, fantasy series *Tokyo Ghoul* came in third, with less than half the demand expressions of *The Walking Dead*.

Top 10 Overall TV Shows

Rank	Title	Average Demand Expressions™
1	The Walking Dead	20,803,665
2	Attack On Titan	17,401,391
3	Tokyo Ghoul	8,555,462
4	Prison Break	7,841,680
5	Game of Thrones	7,678,398
6	Doctor-x	7,220,235
7	Sword Art Online	6,738,589
8	Homeland	6,117,326
9	Kamen Rider Ex-aid	5,911,877
10	Gintama	5,571,796

Top 10 Digital Originals

Rank	Title	Platform	Average Demand Expressions™
1	Marvel's Iron Fist	Netflix	3,741,535
2	Marvel's Luke Cage	Netflix	2,740,563
3	The Grand Tour	Amazon Video	2,639,514
4	13 Reasons Why	Netflix	2,393,725
5	House of Cards	Netflix	2,286,097
6	Stranger Things	Netflix	2,116,209
7	Marco Polo	Netflix	1,572,873
8	The Last Kingdom	Netflix	1,458,357
9	Travelers	Netflix	1,266,353
10	The Mindy Project	Hulu	1,251,387

Date range: 20-26 April 2017

Market: Japan

Demand Expressions™: Total audience demand being expressed for a title, within a country. [Audience demand reflects the desire, engagement and consumption of content, weighted by importance; so a stream/download is a higher expression of demand than a 'like'/comment.]



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