

US\$5.65b close for IPL TV/digital

Disney tipped as TV winner, Viacom18 takes digital in record-breaking auction

India's BCCI cricket board is believed to have closed India TV/digital rights bidding for the Indian Premier League's (IPL) 2023-2027 cycle at Rs44,075 crore/US\$5.65b.

BCCI had not at presstime confirmed the identity of the buyers for the two packages or issued any statements.

Sony, which bid separately from partner Zee, was initially tipped to have taken TV rights for India, paying Rs23,575 crore/US\$3b, with Reliance/Paramount/Bodhi Tree Systems-backed Viacom18 winning India digital rights at Rs20,500 crore/US\$2.63b.

Info out of India late last night (13 June 2022) put the TV rights in Disney's hands, sparking off a social media debate over the strategy of paying so much for linear.

Record-breaking rates for the next five years were widely expected, tempered by warnings of a dial-back in the 'growth at any cost' approaches of the past.

The e-auction for other lower-value packages was still open at press-time.



Lionsgate Play PH, PLDT tie up

U.S. streamer free to PLDT subs for 12 months

Lionsgate Play has gone live in the Philippines in an exclusive deal with telco PLDT. The U.S. streamer will be available free to PLDT subs until June 2023. The platform's Philippines' roll out was announced in August last year alongside the appointment of Cecilia Marino as Philippines GM. The Philippines is the streamer's second market in S.E. Asia.

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Malaysian superhero *Ejen Ali* returns on 25 June; exclusive premiere on Disney+ Hotstar



Ejen Ali S3

Season three of Media Prima's Malaysian superhero series, *Ejen Ali*, premieres on 25 June in an exclusive rights deal with Disney+ for its lower-cost Disney+ Hotstar streaming platform.

The animated property was the sole title from Malaysia included in Disney+'s Asia slate announced in October last year.

Over the past few years, the blockbuster franchise has more than once come to the rescue of parent, Media Prima. The 2019 film version remains Malaysia's highest-grossing animated movie ever and one of the top box-office earners in the country's history.

The new season reunites Ejen Ali and the young agents from the MATA Academy for a secret competition. As Ali strives to honor his late mother's legacy, he grapples with all manner of challenges, including highly skilled adversaries, secret plots, a rogue agent and various villains.

The season is a co-pro between WAU Animation and free-TV broadcaster Media Prima's Primeworks Studios.

Noorhayati Maslini, Azi Shafian and Azman Zulkipli reprise their roles in the show. Usamah Zaid, director and head scriptwriter, and Shafiq Isa, creative and voice director, also double up as several characters in the series.

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Vidio original tops May reach

Cool Boy vs. Cool Girl wins Indonesia's streaming battles for the month – MPA/AMPD

Indonesian platform Vidio's *Cool Boy vs. Cool Girl* topped the country's streaming reach in May 2022, with a second original – *My Love My Enemy* – also in the top five for the month along with Viu's acquired tvN drama, *Sh**ting Stars* and acquired mystery drama movie *Teka-Teki Tika* on Disney+ Hotstar, according to Media Partners Asia's (MPA) AMPD measurement.

Directed by Annisa Meutia for Screenplay Films, the eight-episode *Cool Boy vs. Cool Girl* is the story of Keysa (played by Natasha Wilona), whose desire to maintain her perfect life changes when she is assigned to persuade former swimmer Naufan (played by Abidzar Al Ghifari) to return to school.

The series is based on a story from online platform Wattpad.

The return of Viu's Indonesia original, *Pretty Little Liars*, for a second season also played well. The show, adapted from the U.S. scripted drama, ranks #2 for Viu's titles in May.

Disney+ Hotstar's third local original drama, *Wedding Agreement The Series*, was the lower-cost hybrid platform's top reaching title in May.

K-dramas, both 2022 releases and library dramas, remained a key driver of Netflix consumption, the AMPD data shows.

WeTV's local pipeline slowed considerably with no new releases in May 2022. Consumption of the mainland Chinese platform in Indonesia in May was driven by Chinese, Korean and some Southeast Asian dramas.

Overall streaming consumption for the month was led by Indonesian (31%), Korean (25%), U.S. (17%), Japan (10%) and Chinese (8%) content.

CJ ENM, Saudi sign 10-year MoU

Korean conglomerate pushes global K-culture agenda



From left: Hamed bin Mohammed Fayez, deputy minister of culture, Saudi Arabia; Badr bin Abdullah bin Mohammed bin Farhan Al Saud, minister of culture, Saudi Arabia; Miky Lee, vice chairwoman, CJ Group; Kang Ho-sung, CEO, CJ ENM

Korea's CJ ENM has tied up with Saudi Arabia's Ministry of Culture in an agreement the company clearly hopes will help expand its profile in the Middle East.

The new 10-year MoU, signed on 9 June by Saudi vice minister of culture Hamed bin Mohammed Fayez and CJ ENM chief executive Kang Ho-sung, is being billed as a "business agreement... to strengthen cultural exchange" and collaboration.

CJ ENM said this month that the initiative, which focuses on film to begin but also covers music, performance, talent

development, food and architecture, is part of the strategy to strengthen its global footprint.

Among other joint projects, the organisations said they would invest in cultural content and develop exchange programmes, as well as share global content distribution trends and OTT industry analysis insights.

The alliance kicks off at the Red Sea International Film Festival in Saudi Arabia, where CJ ENM will exhibit its film titles.

Productions in cooperation with the Saudi Film Commission are also being discussed.

iQiyi upgrades kids offering

QiBubble promises 200 new original anime eps this year

Mainland Chinese streamer iQiyi has announced an upgrade to kids platform QiBubble, adding premium anime and other "age-appropriate" content and offering the service as an independent standalone product.

QiBubble currently offers almost 8,000 titles for children. The goal is to release about 200 new original anime episodes this year, iQiyi said.

The platform will include iQiyi's Children's Channel and Qiyi Guo Kids Edition.

Users will be able to access QiBubble's content through the platform's in-vehicle streaming solution, which supports multi-device access across PC, mobile and tablets. The plan is to roll out QiBubble in more than 10 models of cars "to further create a diversified viewing experience for parents and children".

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Netflix official: *Squid Game* returns



Squid Game director, Hwang Dong-hyuk

Although few doubted that it would happen, Netflix has finally made season two of *Squid Game*. The streamer announced the return in the early hours of Monday morning Asia time. No production or release details have been shared.

The show will be written and directed by Hwang Dong-hyuk and executive produced by Kim Ji-yeon, who says in one of the official release posts that "there's definitely a lot of pressure on how to make [season 2] even better". Kim also speaks about making the new season "even more joyful to a global audience".

Last year's winner Gi-hun will be back in the new season with The Front Man, a brand new character and an intro to killer doll Young-hee's boyfriend, Cheol-su.



Korea's KCC pushes development agenda

Korea's Communications Commission (KCC) is gathering input from local broadcasters in a new bid to support regional stations and develop policies that will drive growth in a digital media environment. The initiative, which kicked off in June with the Gwangju/Jeolla regions, is driven by the KCC's Regional Broadcasting Development Committee, which is eager to help local broadcasters respond to competition from digital media. The KCC is also ever-aware of the need to maintain robust disaster recovery communications.

Mediacorp greenlights *Vaan Varu Vaan* Full-series commission from Singapore's Stardust Story



Vaan Varu Vaan

Singapore's Mediacorp has commissioned a full series of Singapore production house Stardust Story's romantic drama, *Vaan Varu Vaan*.

Release dates across Mediacorp's broadcast/streaming channels have not been confirmed.

The full-series greenlight follows the show's win in Mediacorp's Indian pilot series competition, Vasantham Muthal Paarvai. The competition, launched in 2019, was established to champion homegrown talent; all submissions have to include at least one new scriptwriter.

Vaan Varu Vaan is the story of indie filmmaker, Varu, who gets caught up in her own romantic screenplay. Fantasy and reality merge when she falls in love with a character inside the fictional world.

Stars include Vikneswary Se, Eswari Gunasagar, Stephen Zechariah and Jaynesh Isuran.

The pilot – one of five new pilots presented on Mediacorp's YouTube Drama channel in March this year – was chosen by fans.

The number of episodes in the full series is still being decided.

Stardust Story was founded in 2018 by long-time Mediacorp production exec, Jaya Rathakrishnan.

Long-form drama titles include Tamil-language half-hour drama, *Thilaanaa* about four characters whose worlds collide in their journey towards dance, and *Michael Chiang's Mixed Signals*, about a nerdy engineer who hunts for a lost love and finds she is a far cry from the old-fashioned schoolteacher he first met at a dating event.

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Pakistan

In numbers

Population..... 222.4 million
 Households..... 32.2 million
 Avg. household size..... 6.28
 Daily avg. TV viewership..... 1.92 hours
 TV viewership by genre:
 - Local entertainment..... 55%
 - News..... 19%
 - Others..... 26%
 Mobile subscribers..... 193 million
 3G/4G subscribers..... 113 million
 Broadband subscribers..... 116 million
 Basic telephony subs..... 2 million

Source: Pakistan Bureau of Statistics (population in Jan 2021, households in 2017, avg. household size based on 96,442 households in 2020-2021), Gallup Pakistan (TV viewership in 2017-2018), Pakistan Telecommunication Authority (mobile, broadband in April 2022)



Bichoo, a story about two sisters, Mahnoor and Afreen, with opposite personalities. Aired daily on Hum TV at 7pm and on Hum TV's YouTube channel/app. Produced by Momina Duraid Productions, directed by Syed Wahab Abbas Jafri/Adeel Qamar Khan and written by Maimona Aziz. Stars Syeda Tuba Anwar as Afreen, Maria Malik as Mahnoor/Mano and Subhan Awan as Abrar.

Free TV

ATV

Pakistan's second largest national TV broadcaster, established in June 2005. Operates two 24-hour general entertainment terrestrial channels – ATV and A-Plus.

Pakistan Television Corporation

State-backed national TV broadcaster, Pakistan Television Corporation (PTV, est. 1964), owns and operates nine channels: PTV Home (entertainment), PTV Bolan (general entertainment for Balochistan province), PTV National (local languages), PTV News, PTV Parliament, PTV Global, PTV Sports, PTV World (English-language news/info service), and AJK TV. PTV reaches about 92% of the Pakistan population.

Subscription TV

Mag DTH/Shahzad Sky/StarTimes

In 2016, PEMRA (Pakistan Media Regulatory Authority) awarded direct-to-home satellite broadcasting licences to three companies: Mag Entertainment, a Credence group company; Shahzad Sky, a subsidiary of Shahzad International; and China-backed Startimes Communication. All three licences (valid for 15 years) were sold for PKR14.69 billion/US\$73 million, with the highest bid of PKR4.91 billion/US\$24.44 billion by Mag, followed by Shahzad Sky with PKR4.9 billion/US\$24.39 billion and StarTimes with PKR4.89 billion/US\$24.34. Monthly DTH subscription rates could range from PKR500/US\$2.48 to PKR1,500/US\$7.47 and set-top box between PKR10,000/US\$49.81 and PKR15,000/US\$74.72. As of 13 June 2022, all three DTH services have yet to launch.

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Nayatel (NTL)

NTL, a sister company of broadband provider Micronet Broadband (MBL), launched a fibre to the home (FTTH)/fibre to the user (FTTU) network in Sept 2006, offering triple-play services (broadband, telephony, pay TV) primarily in Faisalabad and Islamabad-Rawalpindi metro areas. Monthly subscriptions cost PKR400/US\$1.99 for the basic cable TV plan and PKR350/US\$1.75 for the digital/HD pack. Nayatel also offers streaming services via Naya TV.

Solo Media Group

Est. in 2011, the Solo Media Group offers cable/digital TV and radio channels, including in-house TV channels to users in Karachi.

Wateen

Established in 2005, Wateen Telecom ventured into cable TV in 2006 for HFC customers. Now it offers over 80 SD and 100 HD local/international channels in Lahore. Monthly subscriptions for triple play packages are from PKR2,199/US\$10.88 for analogue TV channels, 10 Mbps internet and landline to PKR15,499/US\$76.74 for digital TV channels, 100 Mbps connection and landline in Gulberg, Lahore.

Worldcall Telecom

Worldcall Telecom (WTL) was established in mid-1996 as a pay-phone service. Offers 120+ digital/HD for PKR225/US\$1.12 a month, PKR640/US\$3.20 for three months, PKR1,215/US\$6 for six months and PKR2,295/US\$11.46 a year; and 80+ analogue cable channels for PKR450/US\$2.25 a month in Lahore (June 2022). WTL also offers broadband internet services.

Pay-TV Programmers & Channel Distributors

Ary Digital Network

Ary Digital Network (est. 2000) is a subsidiary of the Dubai-based Ary Group. The Urdu-language network was created after the Ary Group acquired a

private TV channel catering to Pakistani expats in the U.K. Ary Digital operates a bouquet of in-house and international channels across a range of genres. Ary Digital is available in 130 countries across SE Asia, Middle East and the U.K. Ary Digital also offers online catch-up TV services and is involved in film distribution via Ary Films.

Classic Entertainment

Classic Entertainment, established in 2002, produces, airs and distributes entertainment, infotainment and music-based TV content. Classic Entertainment's bouquet in Pakistan includes France24, CNN, NBC and Phoenix TV.

Geo TV Network

Geo TV Network (est. May 2002) started broadcasting commercially in Oct 2002. The network operates in-house channels, including Geo News, Geo Entertainment (Urdu/Turkish drama, reality), Geo Super (sports), Geo Tez (breaking news) and Geo Kahani (drama) and video portal Geo Dost, and a feature film division. Geo TV transmits via satellite across Pakistan, the Middle East, U.S., U.K. and Europe.

Horizon Media

Manages the distribution of United Arab Emirates-based entertainment channel Urdu 1.

Hum Network

Hum Network (formerly Eye Television Network, est. 2004) offers in-house channels 24-hour entertainment channel Hum TV (local drama); Hum Masala (food channel in Urdu); Hum News; and Hum Sitaray (foreign/local entertainment).

Indus Television Network

Established in 2000. Distributes a mix of news and entertainment channels including Urdu-based news channel AAP and Indus-branded Indus Vision, Indus Music and Indus Plus.

Leo Communication

Leo was founded in May 1996 as a CATV equipment company and continues to be involved in cable installation and maintenance.

In 2000, the company started distributing channels. Leo's bouquet includes local services Film World (Bollywood movies), LTN Family (general entertainment), and Aruj TV (family). Leo also produces drama series, under its own production subsidiary LTN Productions.

Venus Entertainment

Karachi-based Venus Entertainment launched in 2014. The network owns and operates general entertainment channels Venus Entertainment and Venus.

IPTV/OTT/Streaming

Mr Mufe

Malaya United Films and Entertainment's Mr Mufe is an up and coming OTT platform in Pakistan, unveiled in 2020 but yet to launch as of 13 June 2022. The programming plan is to offer mainly family-oriented original content, drama series, cooking/health/lifestyle shows, telefilms, kids and sports content, among others, for free to all Pakistani users. The platform also promises royalty payments to everyone involved in the content production. Aside from Pakistan, the aim is to also launch in Malaysia, Singapore, Brunei, Bangladesh, India, Indonesia, Oman, Thailand and U.A.E.

Naya TV

Naya TV, launched in May 2022 by telco Nayatel, is a streaming service offering 60+ live TV channels. Monthly subscriptions cost PKR75/US\$0.37 for a single screen and PKR250/US\$1.20 for a four-screen plan (June 2022).

PTCL Smart TV

Pakistan's sole IPTV service, Smart TV, launched in Aug 2008. The triple-play platform offers 130+ live TV channels and over 13,000 hours of VOD across 150 cities (June 2022). The Smart TV Regular plan costs PKR540/US\$2.67 a month with 8Mbps internet connection. Stand-alone Smart TV plan is PKR599/US\$2.96 a month. VOD titles cost from PKR25/US\$0.12 per title to PKR300/US\$1.48 per title for 48 hours unlimited viewing. Also carries 3rd-party streaming services such

as Starz Play by Cinepax for PKR239/
US\$1.18 a month, and Netflix.

Starz Play by Cinepax

Launched in Oct 2018, Starz Play by Cinepax is a SVOD service by cinema chain Cinepax and Lionsgate's Starz-Play Arabia. The platform offers original/Hollywood/Pakistani/Bollywood film/TV content, to users in Pakistan and 20+ countries across MENA. Original content includes crime/thriller series *Mumkin* and *Karachi Division*; *Kaash Keh*, an anthology of short drama series addressing taboo topics in Pakistan; and comedy *Khel Tamasha*, about the misadventures of a film cast and crew. Subscription plans cost PKR13/US\$0.06 per day, PKR85/US\$0.42 a week and PKR299/US\$1.47 a month.

Urduflix

Emax Media's Urduflix provides access to original Urdu series, films, webseries, local/foreign dramas (including Korean dramas *Legend of the Blue Sea* and *Mr Queen* acquired from Hong Kong-based global content distributor, O4 Media) and Urdu-dubbed Turkish dramas. Monthly subscription fee costs US\$1.99. Annual is US\$14.99.

Regulators

Ministry of Information and Broadcasting

The Ministry of Information & Broadcasting administers rules and regulations and laws relating to information, broadcasting and the press in Pakistan.

Pakistan Electronic Media Regulatory Authority (PEMRA)

Established in 2002, PEMRA's mandate is to regulate establishment and operation of all broadcast media (satellite TV & FM radio) and distribution services (cable TV, DTH, IPTV, and mobile TV etc) in Pakistan.



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| | 24-26 | ContentAsia Summit (In-person + Live Online) | Bangkok, Thailand |
| | Until 25 Sept | ContentAsia Summit (On-demand) | Online |
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| | 31 Aug - 2 Sept | BCWW | Seoul, Korea |
| September 2022 | 22-25 | Gwangju ACE Fair | Gwangju, Korea |
| | 27-29 | APOS Singapore | In-Person, Capella Singapore + Live Streamed |
| October 2022 | 6 | AVIA: Indonesia in View | Jakarta, Indonesia |
| | 15-16 | MIP Junior | Cannes, France |
| | 17-20 | MIPCOM | Cannes, France |
| | 25-27 | TIFFCOM Online | Online |
| November 2022 | 7 | AVIA: Policy Roundtable | |
| | 8 | AVIA: The State of Piracy Summit | |
| | 9-10 | AVIA: Asia Video Summit | |
| | 23-24 | Dubai International Content Market | Dubai |
| | 29-30 | APOS Mumbai | In-Person, Mumbai + Live Streamed |
| December 2022 | 7-9 | Asia TV Forum & Market (ATF) | Singapore |
| January 2023 | 16-23 | Natpe Miami | |
| March 2023 | 13-16 | Hong Kong Filmart 2023 | |
| April 2023 | 17-19 | Mip TV 2023 | Cannes, France |

Stranger Things wins India

Strong showing from local streamer MX Player's Aashram

Nothing in India could touch demand for Netflix's *Stranger Things* for the week of 31 May to 6 June, according to data science company Parrot Analytics.

The latest edition of the sci-fi horror drama attracted more than double the demand of long-running Hindi supernatural series *Naagin* on the overall list of shows tracked, three times the demand of Amazon Prime Video's multi-season Hindi action thriller, *Mirzapur*, on the digital originals list.

But, apart from a mini-showing for one-time blockbuster, Spain's *Money Heist*, that's pretty much where Netflix's demand wins in India ended.

Domestic streamer, MX Player, is the local digital darling of the week, with enough demand for Prakash Jha's multi-season political thriller, *Aashram*, to rise to third place on the overall list and to comfortably pass high-profile titles such as Prime Video's Indian action crime thriller *Mirzapur* and fantasy series, *The Boys*.

Top 10 overall TV shows: India

| Rank | Title | Difference from Market Average |
|------|---|--------------------------------|
| 1 | <i>Stranger Things</i> | 62.96x |
| 2 | <i>Naagin</i> (नागनि) | 25.86x |
| 3 | <i>Aashram</i> (आश्रम) | 24.03x |
| 4 | <i>Yeh Rishta Kya Kehlata Hai</i> (ये रिश्ता क्या कहलाता है) | 21.89x |
| 5 | <i>Mirzapur</i> | 21.86x |
| 6 | <i>Tarak Mehta Ka Ooltah Chashmah</i> (तारक मेहता का उल्टा चश्मा) | 21.68x |
| 7 | <i>Game Of Thrones</i> | 20.85x |
| 8 | <i>The Boys</i> | 20.72x |
| 9 | <i>Panchayat</i> | 19.78x |
| 10 | <i>Obi-wan Kenobi</i> | 19.44x |

Top 10 digital originals: India

| Rank | Title | Platform | Difference from Market Average |
|------|---------------------------------------|--------------------|--------------------------------|
| 1 | <i>Stranger Things</i> | Netflix | 62.96x |
| 2 | <i>Aashram</i> (आश्रम) | MX Player | 24.03x |
| 3 | <i>Mirzapur</i> | Amazon Prime Video | 21.86x |
| 4 | <i>The Boys</i> | Amazon Prime Video | 20.72x |
| 5 | <i>Panchayat</i> | Amazon Prime Video | 19.78x |
| 6 | <i>Obi-wan Kenobi</i> | Disney+ | 19.44x |
| 7 | <i>Moon Knight</i> | Disney+ | 19.04x |
| 8 | <i>Escaype Live</i> | Disney+ Hotstar | 15.73x |
| 9 | <i>The Family Man</i> | Amazon Prime Video | 15.55x |
| 10 | <i>La Casa De Papel (Money Heist)</i> | Netflix | 15.27x |

Date range: 31 May – 06 June 2022

The total audience demand being expressed for a title, within a market. Audience demand reflects the desire, engagement and viewership, weighted by importance; so a stream/download is a higher expression of demand than a 'like'/comment. In this dataset we are comparing the demand that exists for each series in this market, against the average TV show. A difference of 1x represents the market average and 10x means a series is ten times more in demand than the average TV show in this market




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Published fortnightly by:
Pencil Media Pte Ltd
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