20 February-5 March 2023

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Banijay reworks Asia operation

SG office shuttered, control said to be shifting to India

Banijay is believed to have shuttered its Singapore-based regional office, retrenching staff and shifting full control of distribution and production to its Indian operation in Mumbai. The unexpected decision was apparently announced last Friday. Banijay had not at presstime commented on the Singapore closure and it's not yet clear how many jobs have been cut.

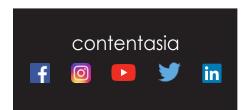


Japan's Nippon changes tack on streaming originals

New production direction kicks off with Ariyoshi Assists

Japan's Nippon TV is producing new Netflix comedy series, *Ariyoshi Assists*, shaking up its approach to original production in relinquishing all rights to its productions for global streamers for the first time. The new arrangement follows Nippon TV's establishment of its content strategy division in June 2022.

The full story is on page 6



Countdown to HK FILMART 2023

13 March opening for full-scale in-person event



Final preparations are underway for the first full-scale in-person Hong Kong International Film and TV Market (FILMART) since the beginning of Covid, gathering the international film and TV industry to the territory for the first time in three years and drawing attention back to Hong Kong's role as a central gathering point for the region.

This year's four-day FILMART opens on Monday, 13 March, a little over a month since Hong Kong lifted visitor quotas and Covid-19 vaccination reauirements for inbound visitors.

For many delegates, FILMART marks their first visit to Hong Kong since the 2019 exhibition. Despite sweeping industry uncertainty, many arrive at FILMART with high hopes for kickstarting their businesses in the new post-pandemic normal.

In addition to hosting the Asian and international industry, FILMART also coincides with the Hong Kong Government's multi-million dollar initiatives to draw visitors back to Hong Kong.

The return of the physical market floor involves more than 20 large-scale pavilions, housing around 600 exhibitors from 25 countries and regions.

The worldwide pavilions include Mainland China, Japan, South Korea, Taiwan, Thailand, Italy, the U.S. and Europe.

Asian exhibitors - led by Mainland China - continue to have a strong presence, especially three key Mainland Chinese streaming platforms iQiyi, Tencent and Youku, as well as renowned HK filmmakers such as Edko, Emperor Motion Pictures, Golden Scene, Media Asia, One Cool Pictures, PCCW Media, Universe and many more.

Participating Mainland Chinese provinces include Beijing, Fujian, Guangdong, Hunan, Hangzhou, Jiangsu, Haining and Ningbo, among others.

In addition to the large-scale exhibition, the FILMART agenda also features seminars, business matching, screenings and other events.

Korean content returns to Hong Kong

More on page 4





Southeast Asia hits 48.4m paying SVOD subs

U.S./Korean content top SVOD viewership, Indo/Thai thrive, MPA report says

U.S. and Korean content were Southeast Asia's top SVOD categories in 2022, driving 57% of viewership in the region, while in Indonesia, local content commanded 23% viewership share for the year, according to Media Partners Asia's (MPA) latest research.

Across Southeast Asia, online video added 4.6 million net new paying customers in Q4 2022, the highest category growth since Q2 2021, when 5.1 million new customers signed up, the report, "SEA Online Video Consumer Insights & Analytics", said.

MPA executive director, Vivek Couto, said he expected 2023 to be "heavily focused on customer retention, churn management and implementing price increases, especially in markets such as the prepaid-heavy Indonesia".

"Key players will continue to invest in localisation and the strategic marketing of premium Korean, U.S. and sports content, but against the background and investor mantra of capital efficiency," he added.

The report covers Indonesia, Malaysia, the Philippines, Singapore and Thailand. Southeast Asia topped 48.4 million

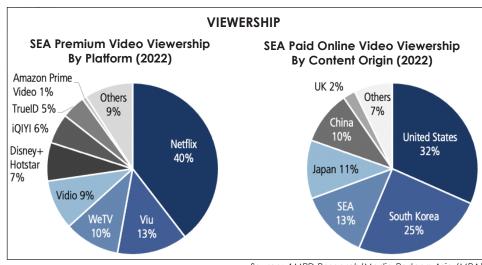
paid online video subscriptions at end 2022, up 1.8 million for the year, "with a particularly strong" 2H (+7.3 million net adds) and Q4 (+4.6 million).

Indonesia contributed 50% to growth in Q4 and 51% for the whole of 2022.

Indonesian streamer Vidio and regional streamer Viu drove Q4 category growth, accounting for 51% of new subscriptions. "Both platforms have built robust subscriber acquisition funnels through a freemium model, with growing focus on paid content and subscribers," the report said.

Indonesia and Thailand remained Southeast Asia's largest SVOD markets in 2022, maintaining an aggregate 75% of SVOD subscriptions.

Netflix, Viu and Disney have 52% of total SVOD subscriptions in Southeast Asia. In Indonesia, Vidio led premium online video engagement with 25% share in 2022. Vidio's FIFA World Cup package was



Source: AMPD Research/Media Partners Asia (MPA) share.

a major contributor to growth. Following the World Cup, churn levels "will be determined by customer demand for new local and international football as well as new local drama series".

Viu closed 2022 with a strong quarter, driven by exclusive hit Korean drama Reborn Rich. "Viu's 3-5 exclusive Korean dramas per quarter in Q2-Q4 drove subscriber growth while subtitled, day-and-date variety and reality content continue to provide meaningful competitive differentiation against peers. Local original content efforts and acquired FTA have been impactful in retaining subscribers," MPA said.

Meanwhile, "Netflix's continued subscriber growth and monetisation leadership remains anchored to a cadence of premium U.S. series, movies and Korean dramas, along with local originals (i.e. Thailand, Indonesia) and anime".

Prime Video "has traction in Indonesia, its leading market in Southeast Asia", where it captured 5% of premium video viewership in Q4 2022. "Prime Video's momentum in Indonesia is driven by marketing around Korean and local titles," the report said.

Disney's Q4 growth was driven by its mid-November 2022 launch in the Philippines, adding close to half a million new subscribers by the end of 2022.

Netflix led premium video viewership across Southeast Asia in 2022 with 40%

"Strategic marketing and localisation efforts in Indonesia, Thailand and the Philippines contributed significantly to [Netflix's] subscriber growth and retention," MPA added.

Netflix's Indonesian original film, Screenplay Films' *The Big 4*, was the top travelling local/Southeast Asia title of Q4.

U.S. content had 32% share of Southeast Asia's SVOD category viewership in 2022 and a strong 37% share in Q4.

Netflix original, Wednesday, topped AMPD demand metrics (reach and viewership) across all five measured markets in Q4.

Southeast Asian content's share of premium video viewership gained in Q4, driven by increased freemium consumption of local titles across Vidio (sinetrons), WeTV (Indonesian originals) and Viu (Thai).

In Indonesia 31% of first-title demand across measured viewership in 2022 was driven by local content. In Thailand, the figure was 20%.

"Rotational churn remains a challenge in Indonesia and other SEA markets," said MPA's lead analyst and head of content insights, Dhivya T.

She added that Korean demand "remains strong but expensive", and said it remained to be seem whether platforms would continue to invest in three to seven new Korean dramas a quarter "as costs and ROI come under the microscope".

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Rebound, K-Movie Entertainment

From page 1: FILMART 2023

stronger than ever this year against a backdrop of soaring demand for premium K-drama and variety, and rising interest in Korean non-scripted/reality titles

The market floor will host two Korean pavilions, both FILMART regulars – government agency, The Korea Creative Content Agency (KOCCA), and the Ministry of Culture, Sports & Tourismbacked Korean Film Council (KOFIC).

Korean companies attending this year include Contents Panda and K-Movie Entertainment, both of which will host their own stands.

Contents Panda's programme highlights include *Soulmate*, directed by Min Yong-geun and produced by Climax Studio and Andmarq in association with Studio&New and Keyeast.

Korean films at the market this year are led by *Soulmate*, an adaptation of the 2016 Chinese film, which releases theatrically in Korea in March.

Soulmate stars Kim Da-mi and Jeon

So-nee in the story of two girls who vow never to be separated until romance gets in the way.

Among the top Korean TV titles at the market this year is *Rebound*, distributed by K-Movie Entertainment. Written by Kwon Sung-hui (*Narco-Saints*) and Kim Eun-hee (*Kingdom*), and directed by Chang Hang-jun (*Forgotten*), *Rebound* is based on a true story about a high-school basketball team in Busan.

The conference agenda kicks off with a dialogue entitled "Entering the New Era of Entertainment" with executives from Korean media conglomerate CJ ENM, India's Zee Entertainment, and Thailand's BEC World.

China's animation as soft power is also a core discussion theme on FILMART's official conference agenda, along with a look at what the future holds for Hong Kong movies.

Dating and romance lead the formats conversation in a session tagged "Hype behind Dating and Romance Reality Shows".

Running alongside FILMART is the Hong Kong International Film Festival Society's 21st Hong Kong-Asia Film Financing Forum (HAF21).

28 in-development projects have been shortlisted for this year's event, which runs from 13-15 March. The 28 were shortlisted from 244 submissions from 38 countries and regions.

The HAF21 line-up includes seven projects from Hong Kong and eight that passed through HAF Film Lab, as well as films from Arsalan Amiri, Fruit Chan and Jakrawal Nilthjamrong. Genres include horror, fantasy, romance, family drama and animation.

Last year's FILMART, held 100% online, drew more than 700 exhibitors with 2,400+ new production showcases, and upwards of 8,000 participants.

Companies from 41 countries and regions participated last year, including Hong Kong, Mainland China, Southeast Asia, Japan, Korea, the Middle East, India, Europe and North America.

Mark your diary on 13-16 March to visit FILMART, the Asia's largest entertainment content marketplace for business exchanges with international filmmakers, producers and distributors.

Scan the QR code now to secure your FILMART badge before 3 March to enjoy the 60% off early-bird discount.





www.contentasiaawards.com
Entry deadline: 14 April 2023



Japan's U-Next, Paravi merge in bid to compete with global streamers

Japanese platform U-Next, owned by Usen-Next Holdings, and Premium Platform Japan's (PPJ) Paravi service will merge on 31 March 2023 as part of a broad initiative to compete with global streamers in Japan.

Paravi is scheduled to migrate to the U-Next platform in July this year.

The companies say the merger will create the largest video distribution platform in Japan, with sales of over ¥80 billion/US\$596 million and more than 3.7 million paying members.

U-Next and TV Tokyo are also collaborating on content supply, marketing and creative development in a new deal the two companies have described as a "comprehensive strategic business alliance".

TV Tokyo Holdings is a major shareholder in PPJ along with TBS Holdings, Nikkei and others.



16 March release for Catchplay's *Losmen Melati*



Losmen Melati

Taiwan-based regional streamer, Catchplay, releases supernatural horror movie, Losmen Melati The Movie, in theatres across Indonesia on 16 March. The film, produced with Infinite Studios, is about a cursed guest house and a mysterious inn owner, played by Alexandra Gottardo, whose harnesses dark powers for her own means and whose visitors are never seen again. Losmen Melati started development in 2020 during the pandemic.

Nippon changes tack on Netflix originals

New production direction kicks off with Ariyoshi Assists in March



Hiroiki Ariyoshi, host of Ariyoshi Assists

Japan's Nippon TV is producing new Netflix comedy series, *Ariyoshi Assists*, shaking up its approach to original production in relinquishing all rights to its productions to any global streamer for the first time.

The 10-episode Japanese-language Ariyoshi Assists premieres exclusively on Netflix worldwide on 14 March and will not air or stream on any of Nippon TV's platforms. The series will be subtitled for viewers around the world.

The new arrangement follows Nippon TV's establishment of its content strategy division in June 2022.

The aim of the new unit is "to accelerate large-scale co-development and co-productions projects with streamers, broadcasters, and producers around the world," Nippon TV says.

"Our goal, at that time, was to build

new strategic creative collaborations with international partners to create original content for viewers worldwide," Mikiko Nishiyama, Nippon TV's EVP, international business development, said in the announcement of the deal with Netflix.

The series, which Nippon TV describes as "the epitome of... crazy Japanese comedy show genre", is hosted by Japanese celebrity, Hiroiki Ariyoshi, with 10 guest hosts. The guest hosts include artists and professional athletes, who will each host their own episode.

Ariyoshi Assists' creators and show runners are Kazuaki Hashimoto and Toshiyuki Yokozawa, who are behind prime-time Japanese entertainment/variety shows, Ariyoshi no Kabe and Ariyoshi Zemi. Both airing weekly on Nippon TV and its network stations.



India's free/pay DTH subs drop to 65.6m

India's active free/paying DTH subscriber numbers dropped 4.8% to 65.58 million for the quarter to the end of 30 September 2022 from 68.89 million in the same quarter the previous year, according to Indian regulator TRAI's latest "Indian Telecom Services Performance Indicator Report", released this month. The latest report also says there were approx. 885 permitted private satellite TV channels (906 in Q3 2021) and 815.93 million broadband subscribers (794.88 million in Q3 2021).



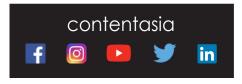
True, DTAC share trading suspended

Thailand's Stock Exchange will suspend trading of DTAC and TRUE shares for nine business days – from 20 February to 2 March 2023 – while the companies sort out their amalgamation.



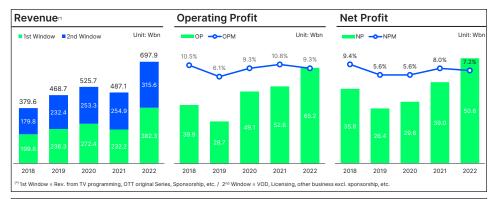
StarHub trials ultraspeed broadband

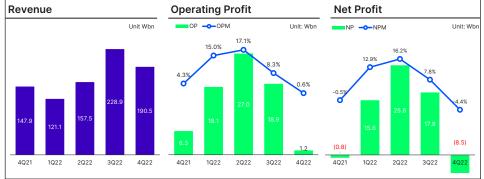
StarHub is trialling "ultraspeed broadband", the first telco in Singapore to trial nationwide broadband using the new 10G-XGS-PON standard. The potential is up to 10 Gbps, which would be 10 times the speed of standard broadband, StarHub said, highlighting the use for gaming and HD/4K/8K video streaming, and other high-bandwidth application. StarHub is charging \$\$119.90/US\$89.76 a month for the ultraspeed service.



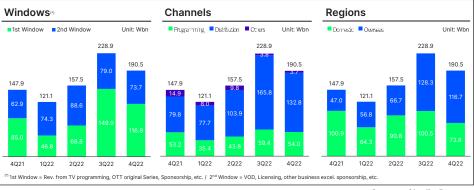
Studio Dragon production up 61% in 2022

Korean prodco's distribution revenue leaps 74%





Revenue Breakdown



Source: Studio Dragon

CJ ENM production house, Studio Dragon, increased its total production budget last year by 61%, with a 74% jump in distribution revenue to KRW697.9 million/US\$546,472, the company said in its latest earnings report.

The company said average production budgets per episode were up 30%.

Calling 2022 a "year of remarkable growth", Studio Dragon also reported its largest-ever contribution from overseas markets – an increase of 61.2% – led by global OTT platforms, Netflix, Apple TV+

and Amazon prime Video.

Operating profit was at an all time high of KRW65.2 billion/US\$51 million, although profit margins were lower than last year.

Studio Dragon attributed its 28.8% Q4 2022 revenue increase to KRW190.5 billion/US\$149 million to the "strengthened value" of its IP. Q4 first window distribution revenue was up 37% year on year, primarily due to streaming originals. Second window rights revenue was up 17% compared to the same quarter last year.



ScheduleWatch: AXN Asia

KC Global Media's AXN action channel holds firm in refreshed-linear era

| | Mon, 13 Feb | Tues, 14 Feb | Wed, 15 Feb | Thu, 16 Feb | Fri, 17 Feb | Sat, 18 Feb | Sun, 19 Feb |
|---|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--|---------------------------------------|
| 6.05pm | CSI: Vegas (S2 Ep13) | Rookie Blue (\$1, Ep5) | NCIS: Hawai'l (S2, Ep14) | The Rookie (\$5, Ep15) | S.W.A.T. (S5, Ep22) | 4.30pm: Jerry McGuire | S.W.A.T. (S5, Ep21) |
| 7pm | Wipeout (S9, Ep9) | Wipeout (S9, Ep10) | Wipeout (S9, Ep11) | Wipeout (S9, Ep12) | Wipeout (S9, Ep13) | The Rookie (S5, Ep15) | S.W.A.T. (S5, Ep22) |
| 7.55pm | NCIS: Los Angeles (\$13, Ep18) | NCIS: Los Angeles (\$13, Ep19) | NCIS: Los Angeles (\$13, Ep20) | NCIS: Los Angeles (\$13, Ep21) | NCIS: Los Angeles (\$13, Ep22) | S.W.A.T. (S5, Ep21) | NCIS: Hawai'I (\$2, Ep14) |
| 8.50pm | The Amazing Race (S34, Ep5) | The Amazing Race (S34, Ep6) | The Amazing Race (S34, Ep7) | The Amazing Race (S34, Ep8) | The Amazing Race (S34, Ep9) | S.W.A.T. (S5, Ep22) | CSI: Vegas (S2 Ep14) |
| 9.45pm | Rookie Blue (S1, Ep5) | NCIS: Hawai'l (S2, Ep14) | The Rookie (S5, Ep15) | S.W.A.T. (S5 Ep21) | CSI: Vegas (S2 Ep14) | NCIS: Hawai'l (S2, Ep14) | lla da sata al |
| 10.40pm | CSI: Vegas (S2 Ep13) | Hudson & Rex (S4, Ep9) | Hudson & Rex (S4, Ep10) | S.W.A.T. (S5, Ep22) | My Best | CSI: Vegas (S2 Ep14) | Uncharted |
| 11.35pm | Rookie Blue (S1, Ep5) | NCIS: Hawai'i (S2, Ep14) | The Rookie (S5, Ep15) | CSI: NY (S8, Ep15) | Friend's Wedding | Mission Impossible – Ghost Protocol | 11.50pm: The Rookie (\$5, Ep15) |
| Movies Drama Unscripted Source: KC Global Media/AX Chart: Content Asi | | | | | | | |

Chart: ContentAsia

Action channel AXN - one of Asia's longest-running pay-TV brands – shows up in 2023 updated and reshaped for an on-demand, ultra-populated and scattered entertainment environment.

Still a linear English-language entertainment leader in the region, the channel under owners KC Global Media, has shifted into first run/exclusive premiere+catch-up mode on both its linear schedule with added on-demand functionality.

The on-demand function includes, for example, six episodes of The Amazing Race S34 (as of 20 Feb on Singtel's standalone streaming app, Cast) and 12 eps of Wipeout S9.

"Having a ton of catch-up available has allowed linear to be a more streamlined/frictionless way for consumers to get to shows," says George Chien, KC Global Media's co-founder/CEO.

As streamers in Asia grapple with the complexities of the SVOD environment, linear programmers are attempting to wrest back a narrative that focuses on

value, clarity, simplicity and easy access.

The refreshed story includes pareddown acquisitions, rationalised costs and simple scheduling that both re-enforces appointment viewing and offers options in encore broadcasts.

AXN remains an active buyer of action/adventure-skewed U.S. studio titles, including the CSI and NCIS franchises from Paramount. The network also keeps a keen eye on indie productions from around the world.

Whatever the industry drama and upheaval all around it, AXN's core acquisitions strategy has not changed. Much like they always have, programmers say decisions to acquire U.S. drama series depend on a range of factors, including popularity and success in the U.S.

March 2023 marks the first and exclusive premiere of Seal Team season six, acquired from Paramount Global Content Distribution. The season will air on AXN on 2 March in the Thursday 9.45pm slot currently filled by S.W.A.T. S5. The 10-episode season premiered exclusively on Paramount+ in the U.S., in September 2022, followed in January this year by a renewal for the seventh season.

Perhaps the most critical change is the necessity for on-demand rights. This is driven by the change in consumption habits. Viewers, the programming team says, "need more options to catch up".

Competition-based reality formats that feature gradual elimination of participants, such as The Amazing Race and WipeOut, continue to be relevant and popular with AXN's audiences.

Although large-scale Asia-based versions of The Amazing Race have been paused for now (S5 aired in 2016), AXN continues to fly the flag for the action format, stripping the U.S. S34 across weekdays at 8.50pm and reinforcing its brand as the property's home in Asia.

Local versions of formats such as Asia's Got Talent, The Apprentice Asia and The Amazing Race, however, remain on the radar. "Asian original productions will continue to be an important pillar of our content offering," the network says.

Japan

In numbers

| Population | 124.77 million |
|---------------------------|----------------|
| Households | 59.76 million |
| Avg. household size | 2.95 |
| TV licences issued | 44.76 million |
| Cable TV households | 31.5 million |
| Satellite TV households | 22.7 million |
| SVOD paying subscribers | 49 million |
| - Amazon Prime subs | 16.5 million |
| - Netflix subs | 7 million |
| - U-Next/Paravi subs | 3.7 million |
| - Disney+ subs | 3.6 million |
| Fixed broadband subscrib | ers 44.30m |
| FTTH subscribers | 37.33 million |
| Mobile phone subscribers. | 205.15 million |
| | |

Source: Statistics Japan (population in Jan 2022, TV info in 2020), Ministry of Internal Affairs and Communications (households in Jan 2021, mobile, fixed line in Sept 2022), Media Partners Asia/AMPD Research's quarterly report, Japan Online Video Consumer Insights & Analytics (SVOD, Q3 2022).

Free TV

Fuji Television

Fuji TV was established in 1957 and started broadcasting in 1959. Since then, the broadcaster has expanded its media and content businesses, providing terrestrial/satellite (BS/CS) TV broadcasting, radio, streaming, content production, gaming, publishing and content sales services, among others. Outside of Japan, Fuji TV is mostly known for formats such as Hole in the Wall, Total Blackout, The Noise and Iron Chef. Fuji's international footprint also includes it's first international co-production, The Window, a 10-episode character-based thriller, produced with Germany's Boogie Entertainment and ZDF Enterprises, along with Velvet Films in Belgium.

NHK

NHK (founded 1926) became a public broadcaster in June 1950. NHK operates two terrestrial TV channels (General TV, Educational TV/NHK E), two satellite TV channels (BS 1, BS Premium), two super highvision satellite TV channels (BS4K, BS8K)



Themis's Law School Classroom, a school/legal drama series on Fuji TV since 9 January 2023. Directed by Kensaku Sawada and Masaki Tanimura, the 11-episode series is a story about judge Shizuka Hiiragi (played by Keiko Kitagawa) who becomes a practitioner/teacher in a law school and introduces a new education system. The series airs Mondays at 9pm and the finale is scheduled to air on 20 March 2023.

and three radio channels (Radio 1, Radio 2, FM). Funded by receiving fees from Japanese households, NHK also offers international TV stations (NHK World TV, NHK World Premium) and radio services.

Nippon TV

Japan's leading multiplatform entertainment powerhouse and ratings champion Nippon TV began broadcasting in 1952. Nippon TV marked its 12th consecutive year in winning the "triple crown" annual ratings between 3 Jan 2022 and 1 Jan 2023, with 3.7% for all day (6am-12am), 5.5% for prime time (7pm-11pm) and 5.9% for golden time (7pm-10 pm) (commercial broadcasters, source: Video Research, Kanto region). Internationally, Nippon is best-known for Dragons' Den/Shark Tank, a business show format that has more than 45 versions in 186+ territories worldwide; drama series format, Mother, which was sold

to South Korea, Turkey, Ukraine, France, Thailand, China, Indonesia and Spain; action-packed game show format Block Out, that has been adapted in Thailand, Indonesia, Vietnam, Spain and Holland; and unscripted format Mute it! and Sokkuri Sweets/Eye Candy, among others.

TBS

Tokyo Broadcasting System (TBS, est 1951) broadcasts news, information, entertainment and variety content. TBS ranked third for all day (1.5%), golden time (3%), prime time (2.9%) and non-prime time (1.1%) terrestrial viewer ratings in April 2022-Jan 2023 (4-49 year olds demo, source: Video Research in Kanto region). The station is also involved in satellite/cable TV (BS-TBS, TBS News Bird), VOD (TBS On Demand, geo-blocked), programme distribution (including original formats Sasuke, Takeshi's Castle) and radio broadcasting services. Recent de-











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Be included, contact:

Leah at leah@contentasia.tv (Americas and Europe) Masliana at mas@contentasia.tv (Asia, Australia and Middle East) CJ Yong at ci@contentasia.tv (Taiwan and China)









velopment includes a new production studio called The Factory, to produce high-end, international stardard content. The Factory is scheduled to be completed by June 2023.

TV Asahi

TV Asahi Corporation (founded in Nov 1957 as Nippon Educational Television) launched in Feb 1959. The terrestrial station shifted from educational to general entertainment in Nov 1973. The group also operates BS and CS broadcasting, The Asahi Shimbum (newspaper) and Toei, a producer and distributor of movies, TV dramas and animation. Internationally, TV Asahi is best known for manga series Doraemon, Crayon Shin-chan, Masked Rider Wizard and Tokumei Sentai Go-Busters. Although TV Asahi ranked second behind Nippon TV for the commercial TV annual all day (3.6%) and golden time (5.5%) terrestrial viewer ratings between 3 Jan 2022 and 1 Jan 2023, the broadcaster's prime time ranking leveled with Nippon TV at 5.5% for the same period (source: Video Research, individual, all ages).

TV Tokyo

TV Tokyo (est 1964) provides terrestrial, BS and CS broadcasting, online (TV Tokyo Play) and mobile content services. TV Tokyo transmits via six stations, and claims reach of about 70% across Japan. The daily line-up is mass market general entertainment content, including variety, current affairs and anime. TV Tokyo also has interest in Vietnam's streamer Pops Worldwide.

Pay TV

Hikari-TV

IPTV over IPv6 platform, Hikari-TV, was launched in March 2008 by NTT Plala. The platform, operated by NTT's Plala subsidiary lcast, offers more than 100 channels and more than 41,000 VOD titles. Monthly subscriptions range from

¥1,100/US\$8.20 for 10+ channels to ¥3,850/US\$28.70 for 50+ channels and 41,000+ VOD titles. The service is available via set-top box and smart TV with the Hikari-TV function, as well as via the Hikari-TV Dokodemo app.

J:Com

JCom (est. 1995, formerly Jupiter Telecommunications) provides cable television (J:Com TV), high-speed internet access (J:Com Net), telephony, mobile and electric power services to 5.63 million subscribing households (22.17m homes passed, 14.07 million connected homes, Dec 2022). The cable TV service offers more than 90 channels with multi-channel broadcasting, dual simultaneous recording feature and VOD/4K online services. J:Com also offers on-demand viewing via J:Com On Demand and Milplus, an IP-based VOD service. J:Com produces and distributes films and other content, and operates 14 BS/CS thematic CATV, DTH and IPTV channels.

Sky PerfecTV!

Sky Perfect JSAT (est Nov 1994) is the sole provider of both multi-channel pay-TV broadcasting and satellite communications services in Japan. The Sky PerfecTV! multi-channel pay-TV service offers 240+TV/radio channels bundled in three monthly packages (basic, premium, premium Hikari), delivered via satellite and fibre-optic networks, to 2.837 million subscribers (Jan 2023). Basic subscription fee costs ¥429/US\$3.20 a month.

Wowow

Founded in Dec 1984 as satellite broadcast company, Japan Satellite Broadcasting, Wowow began its BS analogue pay-TV business in April 1991 and started BS digital broadcasting at the end of 2000. Wowow had 2.537 million subscribers (of which 359,827 with multiple services) at the end of 2022. The platform owns/operates three full HD 24-hour channels – Wowow Prime (mov-

ies, documentaries, int'l/original drama); Wowow Live (live sports & events); and Wowow Cinema (approx 1,400 local/foreign movie titles a year). Streaming service Wowow Members On Demand offers simultaneous transmission of all the three linear channels, live events and sports, and original/licensed content.

OTT/Online/Mobile

AbemaTV

Launched in April 2016, AbemaTV offers 20+ TV channels and about 30,000 episodes/titles of original, local and foreign movies/TV series. Co-owned and developed by CyberAgent and TV Asahi. Monthly subscription costs \$960/US\$7.15 a month without contract.

Amazon Prime Video (Japan)

Amazon debuted its Prime Video service in Japan in Sept 2015, offering a robust multi-genre original production slate for Japan, including the reboot of TBS' iconic 80's game show, Takeshi's Castle; a Japanese adaptation of romantic anthology series, Modern Love Tokyo; and Japanese adaptation, Bachelor/Bachelorette Japan. Prime Video Japan had 16.5 million subscribers in Q3 2022, according to Media Partners Asia (MPA)/AMPD Research. Annual membership costs ¥4,900/US\$36.50 and monthly is ¥500/US\$3.70.

Dazn Japan

Part of global sports media group Perform, Dazn Japan offers more than 130 content and 10,000 games (live/catch-ups/highligts) for ¥980/US\$7.30 a month for the Global plan or ¥3,700/US\$27.60 a month for the Standard pack. Annual subscription costs ¥30,000/US\$223.65. The platform holds the rights to domestic and international football competitions, including J. League, La Liga, Serie A, Ligue 1, and the FA Cup, alongside NFL, Formula 1, WTA and FIBA. Dazn's Japan rollout in Aug 2016 was its first in











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Asia. In 2020, Dazn expanded globally to more than 200 countries and territories worldwide, including Singapore (except China, Crimea, Iran, Myanmar, North Korea and Syria).

Disney+ Japan

Streaming platform Disney+ debuted in Japan on 11 June 2020 in an exclusive launch alliance with long-term partner NTT Docomo. Disney+ Japan had 3.6 million subscribers in Q3 2022, according to Media Partners Asia (MPA)/ AMPD Research. Disney+ costs ¥990/ US\$7.38 a month or ¥9,900/US\$73.80 in Japan.

dTV

Launched in April 2015 as d-Video/ BeeTV, dTV is a video content distribution service offering about 120,000 local/international titles. dTV costs ¥550/ US\$4.10 a month for unlimited viewing.

Fuji TV on Demand (FOD)

The multimedia service of commercial broadcaster, Fuji TV, offers 80,000+ videos, including original series; live channels; and e-books/manga comics. Geoblocked FOD is free with limited content and premium subscription is ¥976/ US\$7.30 a month.

Hikari TV Video

Internet service provider NTT Plala's Hikari TV Video offers more than 25,000 videos and 50+ channels. Subscription costs ¥350/ US\$2.60 a month for non-Hikari TV subs.

Hulu Japan

Hulu Japan is operated by HJ Holdings Inc, a majority owned subsidiary of Nippon Television Network Corporation. The platform offers over 100,000 content to 2.9 million paying subs (Q1 2022). The line-up ranges from U.S. studio block-busters to Hulu Japan originals. Hulu Japan launched in Sept 2011 and was acquired by Nippon TV in 2014. Monthly subscription costs ¥1,026/US\$7.60 or ¥1,050/US\$7.80 via iTunes.

Netflix launched in Japan on 2 Sept 2015, ahead of its global rollout in Jan 2016. There were seven million Netflix subscribers in Japan in Q3 2022. Monthly subscriptions range from ¥990/US\$7.35 to ¥1,980/US\$14.70.

Lionsgate+

Lionsgate/Starz launched Lionsgate+ (formerly Starzplay) in Japan in April 2020 via Apple TV channels on the Apple TV app on iPhone, iPad, Apple TV, iPod touch, Mac, select Samsung and LG smart TVs, and Roku and Amazon Fire TV devices. Offers access to Starz original series, premium movies and curated content.

NHK on Demand (NOD)/NHK Plus

NOD (launched Dec 2008) is mainly a fee-based, VOD service offering mostly catch-up NHK shows (available as early as one day after the original free-to-air broadcast) and NHK's library titles. Select content is also available for free. Launched April 2020, NHK Plus is a free live/catch-up TV services for users in Japan. NOD's monthly subscription costs ¥990/US\$7.40. A la carte starts from ¥110/US\$0.80 to ¥330/US\$2.45 a title.

Niconico

Niconico (launched Dec 2006) is a video sharing website formerly known as Niconino Dauca or Nico-do. Offers UGC, interactive live streaming, and VOD (drama, movies, anime, docus, sports) for ¥550/US\$4.10 a month or ¥6,600/US\$49.20 a year.

Rakuten TV

Rakuten TV (formerly Rakuten ShowTime) offers about 200,000+ titles, ranging from Japanese drama to Korean and Englishlanguage drama/movies, as well as animation and sports, from ¥220/US\$1.60 a month.

Spoox

Spoox is Sky Perfect JSAT's geo-blocked streaming services offering about 30,000

sports, live music/performances, movies, drama series, variety shows and animation titles, among others, for ¥990/US\$7.40.

Telasa

Telasa is a video streaming service launched in April 2020 by TV Asahi (50%) and KDDI (50%), offering local/regional/international content (movies, drama series, anime, music) for a flat monthly ¥618/US\$4.60. Free for the first two weeks.

Tsutaya Premium

T-Media Holdings, a subsidiary of Japan's Culture Convenience Club, launched Tsutaya Premium in Aug 2008. The platform offers local/regional and international titles, consisting of movies, drama, animation and adult series from ¥1,100/US\$8.20 a month for the All You Can Borrow plan.

TV Tokyo On Demand

TV Tokyo offers mostly catch-up shows, available for free a week after the original broadcast. The broadcaster also operates TV Tokyo Biz On Demand, a VOD service offering business/news content for ¥550/US\$4.10 a month.

TVer

TVer (est. Oct 2015), owned/operated by Nippon TV, TV Asahi, TBS TV, TV Tokyo and Fuji TV in collaboration with five private broadcasters in Osaka, is an online portal offering live TV channels and over 500 titles, including drama and variety series, from the five networks and their affiliate companies, free of charge. Each network supplies about 10-15 programmes a week. Shows are available for a week. The ad-supported TVer, which hit 25 million monthly unique browsers (source: Video Research) in Dec 2022, is managed by TVer Inc, formerly Presentcast, a JV between the five networks and four ad agencies set up in 2006 to run online video portal Dogatch.











TVing

TVing, Korea's OTT/online TV/video service plans to launch in Japan via Line Corp in 2022 but as of 20 Feb 2023, there seems to be no launch update/details. The streamer, which launched in home ground Korea in May 2010, says it will offer TVing originals and Korean content as well as domestically acquired IP to target local audiences.

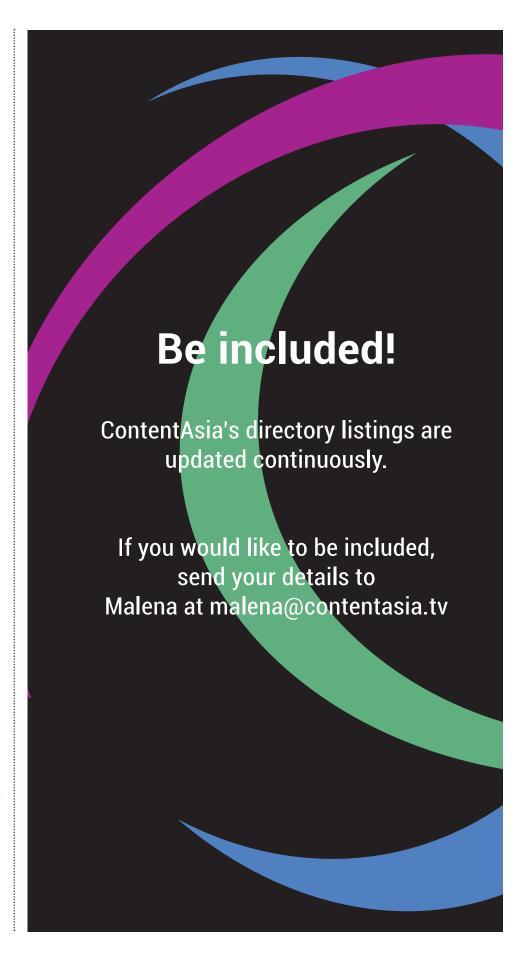
U-Next/Paravi

U-Next (formerly Gyao Next) and homegrown rival Premium Platform Japan's (PPJ) Paravi announced on 17 Feb 2023 plans to merge at the end of March 2023, generating a total combined paid subscribers of more than 3.7 million and 350,000 total titles. Paravi is scheduled to migrate to the U-Next platform in July 2023. U-Next (est. 2007), the surviving company, is wholly owned by Japanese content development company Usen-Next Holdings, offering approximately 300,000 titles including foreign dramas, movies, magazines, music and sports to about 2.85 million paid subscribers. U-Next also provides digital rentals of the most recently aired series and theatrically released features, as well as a selection of manga, e-books and emagazines. U-Next costs ¥2,189/US\$16.30 a month for all content for unlimited viewing. ¥990/US\$7.40 a month for video content. ¥500/US\$3.70 a month for allyou-can-read magazine subscription. Paravi by PPJ was jointly established in July 2017 by TBS Holdings, Nikkei, TV Tokyo Holdings, Wowow, Dentsu Group, and Hakuhodo DY Media Partners, started service in April 2018.

Video Market

Established in June 2005, Tokyo-based geo-blocked Video Market offers over 250,000 local/international videos for ¥550/US\$4.10 a month for the Premium pack or ¥1,078/US\$8 a month for the Premium Unlimited plan.

Adapted from ContentAsia's The Big List 2023





What's on where...

| March 2023 | 5-8 | Australian International Documentary Conference (AIDC) 2023 | Melbourne, Australia |
|----------------|-------|---|------------------------------|
| | 13-16 | Hong Kong Filmart 2023 | Hong Kong |
| | 21-23 | Series Mania Forum 2023 | Lille, France + Online |
| April 2023 | 13 | AVIA: Future of Video India 2023 | Mumbai, India |
| | 14-19 | Canneseries 2023 | Cannes, France |
| | 17-19 | Mip TV 2023 | Cannes, France |
| | 17-19 | Mip Doc 2023 | Cannes, France |
| | 17-19 | Mip Formats 2023 | Cannes, France |
| | 17-19 | Mip Drama 2023 | Cannes, France |
| May 2023 | 4 | AVIA: Taiwan in View 2023 | Taipei, Taiwan |
| June 2023 | 6 | AVIA: Satellite Industry Forum 2023 | Singapore |
| | 7-9 | BroadcastAsia/CommunicAsia 2023 | Singapore |
| | 8-10 | Telefilm Vietnam 2023 | Ho Chi Minh City, Vietnam |
| | 20-21 | AVIA: Asia Video Summit 2023 | Hong Kong |
| | 28-30 | Content Expo Tokyo 2023 | Tokyo, Japan |
| August 2023 | 21-23 | ContentAsia Summit 2023 | Bangkok, Thailand + Streamed |
| | 24 | ContentAsia Awards 2023 | Bangkok, Thailand + Streamed |
| | 31 | AVIA: Indonesia in View 2023 | Jakarta, Indonesia |
| September 2023 | 14-17 | Gwangju Ace Fair 2023 | Gwangju, South Korea |
| | 26-28 | APOS 2023 | Bali, Indonesia |
| October 2023 | 10 | AVIA: Thailand in View 2023 | Bangkok, Thailand |
| | 14-15 | MipJunior 2023 | Cannes, France |
| | 16-19 | Mipcom 2023 | Cannes, France |
| | 25-27 | TIFFCOM 2023 | |
| November 2023 | 8-10 | Taiwan Creative Content Fest 2023 | Taipei + Online |
| | 22-23 | Dubai International Content Market 2023 | Madinat Jumeirah, Dubai |
| December 2023 | 5 | AVIA: Piracy Over the Top 2023 | Singapore |
| | 5 | AVIA: OTT Summit 2023 | Singapore |
| | 6-8 | Asia TV Forum & Market (ATF) 2023 | Marina Bay Sands, Singapore |
| | | | |



Vietnam spreads digital love

The Last of Us, One Piece top overall demand

Vietnam is spreading the digital love across more platforms and periods than other Asian markets, giving China's Mango TV more attention and resurfacing 2018 Chinese drama, Story of Yanxi Palace (streaming on iQiyi), according to the latest demand info from data analytics platform Parrot Analytics.

But overall demand for titles in Vietnam compared to average shows in the country is largely in single digits. Only two titles – HBO's *The Last of Us* and Japanese anime series *One Piece* – crossed

the double-digit demand mark.

In China, Malaysia and Thailand, for example, demand for all titles on the overall top 10 this year has been more than 10x – and in China's case rising to 30.,85 for Alice in Borderland – above the average show in the country.

Although local titles showed up, headed by the Vietnamese version of Korea's Running Man, HBO's The Last of Us topped demand in Vietnam for the week, followed by Japanese anime series, One Piece.

Top 10 overall TV shows: Vietnam

| Rank | Title | Difference from Market Average |
|------|---------------------------------------|-----------------------------------|
| 1 | The Last Of Us | 11.29x |
| 2 | One Piece | 10.77x |
| 3 | Chạy Đi Chờ Chi (Running Man Vietnam) | 9.49x |
| 4 | GAP (ทฤษฎีสีชมพู) | 9.29x |
| 5 | Detective Conan | 8.63x |
| 6 | Unforgettable Love (贺先生的恋恋不忘) | 8.25x |
| 7 | Gao Nep Gao Te | 8.21x |
| 8 | My Hero Academia | 7.83x |
| 9 | Be With You | 7.74x |
| 10 | My Heart Twinkle Twinkle (내 마음 반짝반짝) | 7.67x |

Top 10 digital originals: Vietnam

| Rank | Title | Platform | Difference from Market Average |
|------|---------------------------------------|--------------------|-----------------------------------|
| 1 | Unforgettable Love (贺先生的恋恋不忘) | Mango TV | 8.25x |
| 2 | WandaVision | Disney+ | 7.09x |
| 3 | Record Of Ragnarok | Netflix | 6.31x |
| 4 | The Falcon And The Winter Soldier | Disney+ | 5.92x |
| 5 | The Boys | Amazon Prime Video | 4.85x |
| 6 | Buddy Daddies (バディダディズ) | Aniplex | 3.8x |
| 7 | Lord of The Rings: The Rings of Power | Amazon Prime Video | 3.56x |
| 8 | Loki | Disney+ | 2.74x |
| 9 | Story of Yanxi Palace (延禧攻略) | iQiyi | 2.71x |
| 10 | Andor | Disney+ | 2.58x |

Date range: 7-13 February 2023

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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