

Dickie, Yap exit in Discovery reorg *New structure to focus on local SEA units*

Discovery has axed veteran Asia content exec Kevin Dickie as part of a Southeast Asia restructure announced earlier this month.

Dickie, senior vice president of the Singapore-based regional network's content group, exited on Friday, 17 October, along with communications vice president Charles Yap. The roles will not be replaced at the moment.

More on page 10

Record Mipcom hits 13,700 participants *Asia programmers swarm Palais aisles*

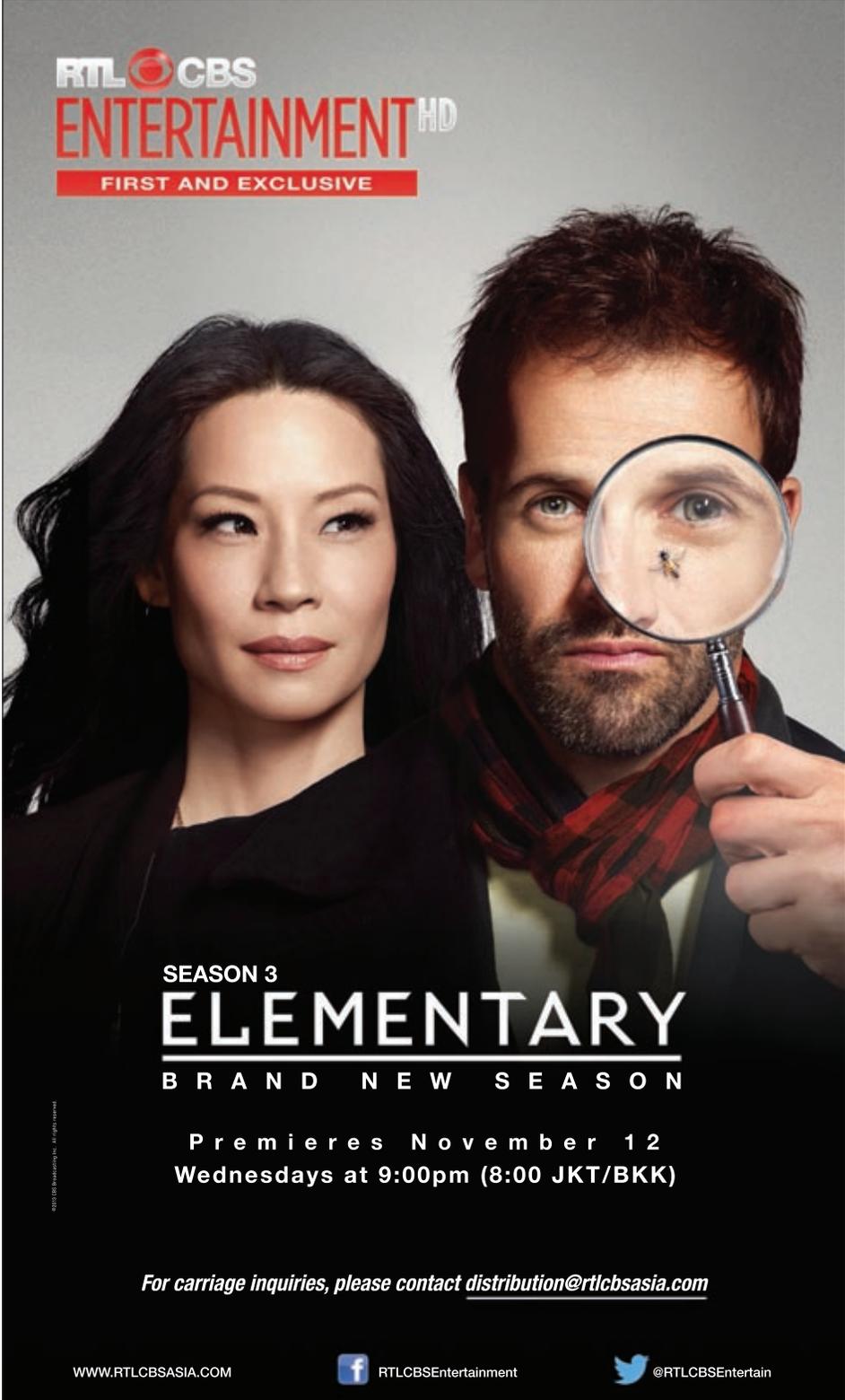
The busiest Mipcom in years closed at the end of last week with 13,700 participants through the doors and a strong global message from content bosses everywhere.

Thai programmers turned up in droves, driven by massive demand unleashed with the launch of 24 new digital terrestrial channels this year. Insiders are also keeping a close eye on developments in the pay-TV industry after the consolidation of two platforms – Grammy and CTH – earlier this year and possible new pay-TV competition from other players.

Chinese online platforms, meanwhile, are making new best friends around every corner.

Taking centre stage in Cannes were Sohu boss Charles Zhang, who talked about an end to piracy, the beginning of an online pay model and welcoming foreign partners from everywhere.

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From page 1: Mipcom



Zuzu and the Supernuffs, Matchbox Pictures



Chris Ottinger, MGM

Meanwhile, mainland platform Tencent was in Cannes talking about original production, including its decision to return a second season of All3Media/Zoo Productions' format *Are You Normal?*

Singapore and Malaysian tax-payer dollars were put to work to promote domestic content industries via country pavilions, and Taiwan's animation houses were all over second screens and looking to a future filled with games, merchandising and short films.

Producers were out in full force, including NBCUniversal's Asia production house Matchbox Pictures, which was at Mip Junior for the first time with *Zuzu & The Supernuffs* along with award-winning live-action youth show, *Nowhere Boys*. It's all part of managing director Chris Oliver-Taylor's expanded Asian production agenda, which already includes *E! News Asia* for NBCUniversal's E! channel and *Diva/CNBC special, Running the Show*, with Susan Li. "We want to be producing quality content across the region," Oliver-Taylor said.

Distributors also have a new focus on Asia, driven both by a more competitive environment, new distribution platforms and opportunities for greater involvement in joint ventures.

MGM's president of international television distribution and acquisitions, Chris Ottinger, said last year's appointment of veteran Warner Bros exec Greg Robertson to drive Asia-Pacific sales was "a game changer... we now have three sales people in Asia for the first time". The second major change in Asia was access to blue-chip unscripted content via the newly formed United Artists Media Group to add to licensing conversations.

Ottinger also said MGM was all over the digital space. "We are positioning ourselves for a digital reality," he said, adding: "Real global OTT players are emerging... We think that in the long term, it's the future of programming. This revolution is coming to Asia in the next 18-24 months."

Made-for-digital shows also continue to make their way into traditional catalogues. Sony Pictures Television, for instance, showcased Gogglebox Entertainment's *Man vs Fly* as a format

More on page 4

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From page 2: Mipcom



Man vs Fly, Sony Pictures Television

for the first time. The show was originally made for U.K. tabloid *The Sun*'s website.

Keshet International said as the market closed that 2014 had been a "year of experimentation", driven by more competitive markets such as China, Indonesia, Thailand and Korea and the need to "strike a balance between finding a niche with consistent programming and staying on top of trends".

"With the willingness to try new genres on the rise, there's a real openness to sourcing ideas from international content providers, whereas in the past – even two years ago – markets were very closed," said sales director Kelly Wright. "This trend has been influenced by the popularity of digital and VOD platforms, which are introducing purchased foreign content – and now original programming – to viewers at rates which are competitive with traditional platforms' offerings," she added.

BBC Worldwide's new Singapore-based Asia executive vice president and general manager, David Weiland, said the market in Asia "seems in rude health, based at least superficially from the number of client meetings we had on the BBC stand".

"China in particular has a certain buoyancy, witnessed by the results from the latest U.K. Television Exports Report which revealed that, for a second consecutive year, the Chinese market represented the greatest percentage increase of British TV exports rising by 40%," Weiland said.

China on the brink of another explosion, Zhang Piracy, micro-payment issues largely resolved, Sohu boss says

Major obstacles to monetisation of China's online video have been resolved, and the mainland industry is on the brink of another explosion in usage, Charles Zhang, Sohu founder, chairman and chief executive, said at this year's Mipcom market in Cannes.

Zhang said China's piracy problem had, largely, been eliminated, and although determined pirates could still find illegal content online, the process was difficult.

This, along with advances in micro-payment infrastructure, removed the two biggest obstacles to online pay content in China. "So you will see another explosion" in online video usage, Zhang said.

He added that Chinese consumers would pay for content. "It's not that Chi-

an official ruling that separated broadcast and production operations.

Zhang talked about the rise of stand-alone studios and higher quality "market-driven content".

"There are huge movements of entrepreneurial start ups to make content... because people see they have outlets for it," Zhang said, highlighting online video's advantage in an environment of tightly controlled state-owned traditional TV stations and no market-driven pay-TV cable.

"There are a lot of things we can do to provide an alternative to state-owned stations... traditional television content is really boring and there's not much content for young people to watch," he said.

One of this year's trends was the rise of

“ There are huge movements of entrepreneurial start-ups to make content... because people see they have outlets for it.”

Charles Zhang, Sohu

nese people don't want to pay. It's just that it used to be very inconvenient. Now this is resolved, Chinese consumers are able to pay online, even in a taxi. It's so easy," Zhang said.

Sohu serves three billion video views a day. Content driving this level of audience includes Hollywood and Korean programming, along with domestic television drama.

About 80% of Sohu's content is local, and 20% is acquired from other markets.

New regulations capping foreign content online at 30% of total content from April 2015 would not impact Sohu, Zhang said, adding that the local content environment was booming.

This boom followed a decade of production development across China after

user-generated content; "We need to catch up with the world on user-generated content," Zhang said.

Another trend was direct-to-online drama. "Suddenly studios realised that they were making all these shows in a rush for TV stations but that content online could be viable. They are starting to make shows for online platforms alone," he said. Zhang also said that Sohu adopts internationally accepted update schedules online, with weekly updates "just like American TV series".

At the same time, Sohu relied heavily on the domestic drama populating traditional TV schedules. The sweetener, Zhang said, was that "we pay much more than TV stations. Companies can double their income by selling to us as well".

Sony Pics networks ups Indonesia investment *SPT takes 50% stake in Dori Media's Baby TV Indonesia*

Sony Pictures Television (SPT) Networks has extended its Indonesia presence, adding a 50% stake in Dori Media Group's Baby TV Indonesia to the stake it acquired in Dori's drama channel last year.

Baby TV has carriage on Indonesia's leading pay-TV platform Indovision, as well as on subscription service Top TV.

The Indonesia acquisition is part of a larger deal, which also includes 50% stakes in the VIVA and VIVA Plus channels and the VIVA Walla online free video-on-demand (FVOD) service in Israel.

As part of the same transaction, SPT Networks will also acquire a 50% stake in Dori Media's Electronic Programme

Guide operations and a 50% stake in DMG's majority holding in Dori Media Ot, which provides technical services including dubbing, subtitling and closed captions.

SPT bought a 50% stake in Dori Media's Bahasa-language telenovela channel, Televiva, in early 2013. The channel has since been renamed Vision 2.

In this latest announcement, Andy Kaplan, president of SPT's worldwide networks, said the acquisition "builds on our strategy to capitalise on channels opportunities around the world, which includes entering new markets". This is SPT's first venture in Israel.

Korean channel K-Plus debuts Naeil's Cantabile in Southeast Asia

Korean channel K-plus brings new drama *Naeil's Cantabile* out of Korea for the first time on 25 October in a Southeast Asia rights deal with free-TV network KBS.

The romantic comedy will air on K-plus in a 7.50pm slot (Jakarta time) every Saturday, with two episodes back to back.

Naeil's Cantabile is the Korean adaptation of the popular Japanese manga, *Nodame Cantabile*, by Tomoko Ninomiya.

The Korean version stars Joo Won as Cha Yoo Jin, a third-year music student majoring in piano. His biggest dream is to become a world-renowned conductor but he has a fear of flying due to a past trauma.

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Top 10 Asia deals @ Mipcom

Malaysian platform Astro is backing a new pan-Asia HD documentary channel – Spark Asia – in partnership with Singapore-based production house Moving Visuals and European factual entertainment joint venture Spark. Spark Asia launches in early 2015 with a line-up of Asian and global content available as a linear service with digital add ons. Global content, including science, exploration, history and wildlife, will be sourced from Spark partners – Autentic and ZDF Enterprises.



Astro chief executive Rohana Rozhan and Moving Visuals' Galen Yeo at the Spark Asia signing in Cannes

Regional channels operator A+E Networks Asia and Malaysia-based investment/development outfit, Ideate Media, have formed a regional production partnership designed to "kickstart content development in Asia". The dollar value of the new alliance has not been disclosed. Programming will target regional and global audiences.

Shine International announced that it had tied up with Hunan TV to develop a Chinese version of U.K. format *The School*. The deal was actually done way earlier in the year. The adaptation of the *TwoFour* format is scheduled to air in 2015. Beryl Yan, Hunan TV's head of programme strategy and international business said localisation strategies and ideas were still being worked out by in-house production teams.

BBC Worldwide opened Mipcom with sales of 500 hours – including a strong drama slate – to multiple platforms

across Asia, including Indonesia's Kompas TV, Malaysia's ntv7, Singapore's MediaCorp, Thai digital terrestrial outfit Mono29 and third-party content aggregator STG Mediaplex in Thailand.

Singapore distribution company Hub Media Group signed an output deal with Mexican format producer BluePrint to distribute and produce new/original content for Asia. BluePrint, in partnership with Comarex, will develop about 450 hours of original scripted and non-scripted content that Kevin Balhetchet's Hub Media will represent exclusively across Asia.

Mongolian broadcaster Mongol TV has acquired 50 Miramax movies, boosting its flagship channel schedule ahead of the launch of a second linear service in the first quarter of 2015. The library deal, including *Life is Beautiful* and *Frida*, is the biggest movie licensing agreement Mongol TV has ever signed.

Pan-Asian channels operator, Celestial Tiger Entertainment (CTE), renewed its exclusive output deal with Hong Kong studio Media Asia Group. The deal secures first and exclusive pay-TV, pay-per-view, VOD and OTT rights, for CTE channels in Malaysia, Brunei, Indonesia and Singapore. New movies include action film *Helios* and romantic comedy sequel *Don't Go Breaking My Heart 2*.

Japan's NHK and BBC Worldwide's Natural History Unit are co-producing three-part natural history series, *Wild Japan*, scheduled to air globally in 2015/6. *Wild Japan* will be shot largely in 4K. Post-production will be done in 4K and 2K, and the series will be available in both formats.

Mainland Chinese platform Tencent has renewed All3Media/Zoo Productions poll-based entertainment format *Are You Normal?* Season two goes live in the first half of 2015. *Are You Normal?* is part of a bigger original production strategy Tencent is rolling out to compete with online rivals and broadcasters.

Mainland China's state-owned broadcaster China Central Television (CCTV), has renewed Star China Media's original format, *Sing My Song*, for a second season. The talent series searches for the best original songs in the nation. A new partnership with online platform Alibaba Digital Entertainment will drive the show's music on Alibaba.com's new digital platforms.



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Hua Hee Dai turns 7

Astro's Hua Hee Dai channel celebrates its seventh anniversary in November with, among other things, international on-ground singing contest *Hua Hee*



Hua Hee Karaoke

Karaoke. The Hokkien competition on 6-7 November will be broadcast live on Astro Hua Hee Dai and Astro On The Go. Six countries will participate – Malaysia, China, Hong Kong, Singapore, Taiwan and Indonesia. The anniversary schedule also includes the return of family game show *Cin Cai Pun Hua Hee*, and sitcom *Hua Hee Sekolah*.

Media Asia to make Chinese Full House

South Korea's Group Eight Co and China's Media Asia Group are co-producing a Chinese version of Korean drama *Full House*. Local reports say filming will begin in December for possible broadcast in 2015. The original version of *Full House*, starring singer Rain, aired on public broadcaster KBS's KBS2 channel in 2004.

Digital cable platform launches in Nepal

Nepal's first digital cable platform, Clear TV, launches in the capital on 1 Nov and will roll out to major cities "gradually". Operator Subisu Cablenet told local papers the service would be the clearest TV viewing experience ever in the mountain kingdom and would change viewer habits. Clear TV will carry a range of channels and genres, including some HD services, recording, and catch up functionality. Subisu also provides internet services and 75 TV channels on the existing HFC infrastructure.

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Programming Senior Manager: Review, shortlist and compile suitable programmes from 3rd party distributors for acquisition, follow-up on contracts, status of rights, adhere to budgets and reporting. Prepare key highlights documentation, lead Request-For-Proposals for original content creation, impartial assessment of production companies, ensuring timely delivery. Familiarity with broadcast censorship standards. Experience in acquisitions and/or production is a-must along with a great work attitude, eye for details and a strong communicator.

On-air Promotions Senior Producers/Editors: Conceive, write, produce and edit on-air promotional spots and marketing campaigns, adapt on-air toolkit for on-going channel usage, proficient with Final Cut Pro, AE. Must have a strong eye for creative, visualization, able to deliver within given deadlines, a team player who collaborates well with Programming and Marketing teams.

Senior Programming Schedulers: Create on-air schedules using in-house scheduling software, hands-on with MAM systems, reconcile daily as-runs to ensure broadcast accuracy, updating programme synopses, EPGs, weekly and monthly programme grids for the channel. Must be detail-oriented and organized, preferred individual should have a passion for TV with a great attitude and strong team player.

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Faith pick up for Philippines' ABS-CBN

The Philippines' ABS-CBN has picked up exclusive rights to Korean fantasy drama *Faith* for its ABS-CBNmobile platform in the latest move to drive mobile usage.



Faith

The drama, dubbed in Tagalog, stars Lee Min Ho as a warrior from the past with magical powers. *Faith* is part of a slate of mobile-exclusive content, including *I Do* mobisodes, ABS-CBN is offering.

Mongolia screens for Globo shows

Mongolian TV stations NTV and TV5 have picked up Globo productions *Brave Woman* and *The Life We Lead*. The two shows air with locally produced voiceovers in Mongolian. The 140-part *Brave Woman*, about a woman who has to escape a human-trafficking ring without endangering her family, premiered in HD in October. The series followed the mid-September debut of *The Life We Lead*, a 70-episode HD series about a promising tennis player who falls into a coma after an accident and wakes up after five years.



MasterChef judge tours Southeast Asia



MasterChef Australia

A+E Networks is bringing celeb chef and *MasterChef Australia* judge George Calombaris to Southeast Asia at the end of this month to promote the new season of *MasterChef Australia*.

Calombaris will host dinners and live cooking demos in Malaysia, Singapore and Indonesia from 26-30 October. *MasterChef* season six airs on Lifetime weeknights at 7pm and 11pm.

From page 1: Discovery

Dickie has been with the network for 14 years, and was most recently responsible for overseeing the Asia brand restructure, including the launch of women's factual network Eve. His remit included programming, scheduling, marketing and media planning, communications and creative services.

Yap joined Discovery in Asia in June 2012 and has been responsible for communications strategy, government affairs and digital engagement.

Discovery's Asia-Pacific president, Arjan Hoekstra, has outlined a new structure that

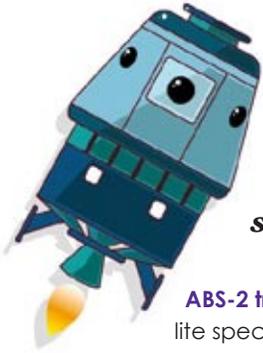
focuses on local operations in Philippines, Indonesia, Malaysia and Thailand (*ContentAsia*, 14 Oct 2014) from early 2015.

The local offices will report into newly promoted Southeast Asia general manager Theresa Ong, with North Asia continuing to be managed by North Asia senior vice president Tommy Lin. Discovery now has 16 offices in Asia.

Details of the investment involved in the new local drive have not been disclosed. Ong was previously vice president for affiliate sales. She reports to Rahul Johri, executive vice president of South Asia and Southeast Asia.



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**Lift off...
ContentAsia's
satellite update**

ABS-2 traffic restored Satellite specialists have their antennae tuned for a US\$200-million insurance claim by Asia-based global operator ABS.

Chris Forrester's U.K.-based *Advanced Television* reported the claim earlier this month, saying that it was based on an "in orbit" failure having occurred within one year of launch.

ABS-2, launched in February this year, operates from 75°E. ABS says the satellite experienced an anomaly on the Russian beam that "affected some channels more severely than others but we were able to restore most of the traffic and the satellite is providing good down link power". Back-up and expansion satellite, ABS-2A, is scheduled to launch in 2015.

Japan puts up new weather satellite

Japan hopes to improve its weather monitoring with new satellite Himawari-8. Japan's Aerospace Exploration Agency (JAXA) and Mitsubishi Heavy Industries successfully launched the weather satellite this month from the Tanegashima Space Center.

The satellite entered geostationary orbit as planned on 16 October and is expected to start operations in mid-2015 after the completion of in-orbit testing and checking of the overall system, including related ground facilities and a cloud-based service to distribute the images collected.

**100 shows headed for Media Prima
Malaysian broadcaster showcases 2015 slate**

Malaysia's dominant free-TV broadcaster Media Prima has showcased more than 100 domestic and foreign titles headed for its 2015 schedules to the country's advertising and media communities.

Media Prima Television Networks' chief executive officer, Ahmad Izham Omar, highlighted the focus on creating content environments that enabled brands to "maximise their ability to reach out to the masses".

Titles on the four free terrestrial channels – TV3, ntv7, 8TV and TV9 – include *The Blacklist* season two, *Once Upon A Time* season four, *Sleepy Hollow* season two and *Witches of East End* season two.

In addition, urban channel ntv7 will air new series *Ejector Seat*, *I Am Not The Queen*, *The Precedents*, *Bet On Your Baby* and Hong Kong TVB drama series *Triumph In The Skies 2*.

Shows headed for trendy station 8TV include *Flying Swords of Dragon Gate*, *Romance of the Condor Heroes*, *Female Assassins In Palace*, *The Ultimate Actor* and *Fantasia*.

TV3 dramas for 2015 include *Lari Mira*, *Keluarga Pontimau* and *Traveling Beruang*.

Media Prima targets Malaysia's 24 million viewers and says video portal Tonton has more than eight million monthly video views. Flagship station TV3 has a 24% audience share across both free- and pay-TV audiences.



Bet on Your Baby

The upfronts in the Malaysian capital of Kuala Lumpur on 13-15 October coincided with production arm Primeworks Studios' latest international licensing effort at the annual Mipcom programming market in Cannes.

The 2014/2015 catalogue included more than 400 hours of programming the studio said represented its "Asian Stories for the World" brand across seven categories.

The categories include movies, formats, food, travel, customs and religion, such as the 13-part *Journey into Islamic Russia*, which tracks the Islamic legacy across Russia, and from *Mosque to Mosque*, which looks at Southeast Asia's architectural heritage.

Formats include the nine-part battle of the bands show *Versus*; dance contest *Showdown*; and *Switch Off*, where rockers and actors are "taken away from the spotlight to face one of the most primal fears of all: the dark".

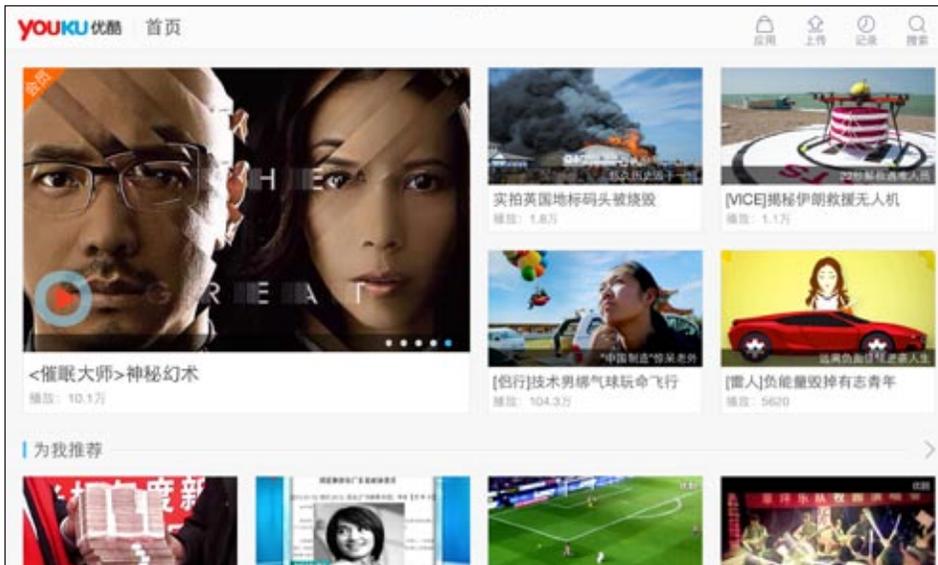


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PLATFORM Youku Tudou, China



In a regular section looking at up-and-coming platforms in Asia, Malena Amzah speaks to Victor Koo, chief executive officer/chairman of China's online video platform provider Youku Tudou.

What is Youku Tudou? Multi-screen video app and website platform available via PCs and all other internet-enabled devices, including tablets and smartphones. Youku stands for "what's best and what's cool" in Chinese.

Founded in Nov 2005. youku.com officially launched in China in Dec 2006. Youku Tudou Inc was formed by the merger of China's two video websites – Youku and Tudou – in 2012.

Users Approx 500 million users total. Youku Tudou has 380 million users on PC and 115 million users on mobile

Who's who Victor Koo, CEO/chairman of Youku Tudou Inc; Dele Liu, president of Youku Tudou Inc; Frank Wei, SVP of Youku Tudou Inc and president of Youku.com; Weidong Yang, SVP of Youku Tudou Inc and president of Tudou.com

Geo-blocked Shows without international rights are geo-blocked for China

Branding Youku's brand positioning is mainstream and positive, while Tudou's

brand positioning is young and edgy.

The offering Offers around 25,000 titles. Youku is a free on-demand platform with pay-per-view and subscription-based services on premium tier Youku Premium. Programming is a mix of licensed content+in-house production+user-generated content. Tudou's offering is the same as Youku, only differs in the focus areas of content.

Monthly rates RMB20/US\$3.20 (Youku) and RMB10/US\$1.60 (Tudou)

Content partners Licensed content: TV and movie studios in mainland China, Hong Kong, Taiwan, South Korea/Hollywood studios/distributors such as Warner Brothers and Disney Media Distribution. In-house production: user-generated-content (UGC)

New content One million hours added a month (including UGC)

Avg. viewing time 73.6 million hours daily, Youku & Tudou combined

Surprises "The number of users on mobile devices has exceeded that on TV, mobile contributes to more than 65% of the total

video views, and on average, a user's video view count on mobile is 2.5 to three times of that on a PC. Long-form content, such as TV shows, variety shows and animation, make a greater contribution to total video views on mobile than on PC."

Most-watched *Special Forces – Phoenix Nirvana* (Chinese TV series), *Let's Get Married* (Chinese TV series) and *The Heirs* (South Korean TV series)

Content rights Most of the content rights on Youku are non-exclusive

Outlook "On-demand business in China is in its early stage, it will double or triple in terms of subscribers in the next 12 months."

Priorities "From a content perspective, Youku Tudou's main priority is to develop differentiated original content for each of our platforms: Youku and Tudou, and also to explore different genres of content that capture the mindshare of Chinese audience."

Social media "We partnered with major social media platforms. From July 2013, Youku Tudou's content has been promoted throughout Weibo. The promotion takes multiple forms, including through personalised recommendation section embedded between micro-blogging posts. Search results for movies and TV dramas provide direct thumbnail links to watch the title instantly. 'Home page' for each title provides direct links to watch it on Youku or Tudou platforms and feature reviews, mentions of that title from other Weibo users, and other information users might find useful."

The best thing that has happened to the OTT industry in Asia "Continued technology improvements and upgrades in internet-enabled devices to connect different screens together, which in return increase the adoption of OTT by the users."

The best thing that has happened to Youku Tudou "The further penetration of mobile internet in China has broadened the scale of Youku Tudou platform, which increases Youku Tudou's media influence and enhances our value with our partners."

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

Super Deal

The Indonesian version of game show format, *Let's Make a Deal*, continues to be a key ratings driver for Indonesia's terrestrial television station Antv.

Now in its fourth season, *Super Deal* has run a total of 182 episodes since its premiere in February, with an average TV rating of 2.4 points. This is a record for the show this season, says Antv's acquisition manager Gunawan.

Antv attained its highest TV share of 14.8% in July and attributed its performance to a slate of driver content, including *Super Deal* (Mondays to Fridays, 6pm-8pm).

Brokered by FremantleMedia, *Super Deal* is co-produced by Antv and FremantleMedia-owned production house PT Dunia Visitama Produksi.

Super Deal is all about winning the most cash and merchandise via mini-games ("deals") played by selected contestants. Each episode features 120 participants, dressed in crazy thematic costumes to increase their chances of being selected as contestants ("traders"). Traders either walk away with their winnings or continue playing and risk getting "zonked", losing their cash and all chances to win bigger prizes.

Following the original format, there are various game segments in each episode but the main 'deal' offering grand prize is played in the last segment called the "End Games".



Super Deal

The Indonesian adaptation has a special game segment, called "Games Bahaya" (dangerous games), where contestants compete in stunts to win cash prize starting from Rp2 million/US\$164.

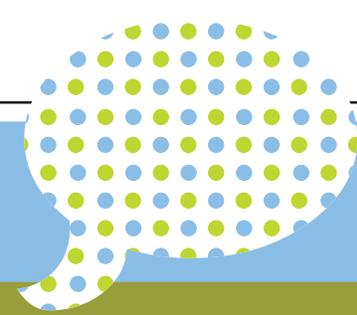
In the third segment, the winning amount starts at Rp1 million/US\$82 and carries through to the next episode should there be no winner in the previous play. So far, the highest cash prize stands at Rp5 million/US\$410.

Super Deal season four is hosted by comedian and magician Uya Kuya. Hosts for the last three seasons were Nico Siahaan (season one), Aditya Herpavi (season two) and Indra Bekti & Indy Barens (season three), along with celebrity co-hosts such as Luna Maya, Raffi Ahmad, Olga Syahputra and Sapri.

Ratings have so far been consistent, except during the festive period. "We do have some decreasing number of ratings as an impact of Eid, where audiences are mostly not at their home to watch television, but overall the ratings are consistent above 2.2 points," Gunawan says.

Technical issues and convincing the audiences that prizes are worth winning are the main challenges, he adds.

Owned and operated by The Bakrie Group's VIVA, Antv produces about 65% of its content in-house and acquires the rest, including format rights to *Deal Or No Deal Indonesia*, *Total Blackout Indonesia* and *New Kata Bergaya (Hot Streak)*.



1.23m new pay-TV subs by end 2014 75% of new subs in SEA from 4 markets, MPA says

Asia's top 16 pay-TV operators across Southeast Asia, Hong Kong and Taiwan added 628,000 net new customers in the first half of 2014 and are on course to add 1.23 million new customers for the year to end December 2014, according to the latest research from analysts Media Partners Asia (MPA).

Indonesia's top pay-TV operator, MNC Sky Vision (MSky), the Philippines' Signal, Vietnam's K+ and Malaysia's Astro collectively contribute 75% to new growth, MPA shows.

Thailand's leading pay-TV operator, TrueVisions, has seen subscriber growth rebound due to repackaging, with gains mainly on the standard pack.

However, MPA says, ARPU remains under pressure and premium packs were down to 318,000 subs at end-June 2014 from 393,000 a year ago.

In Hong Kong, PCCW's Now TV "appears to be growing subs" but its margins fell in the first half to 12% from 17% a year earlier due to English Premier League football costs.

“Scale in revenue [at Now TV in Hong Kong], better yields and a stronger value proposition could emerge with the implementation of a new tiering strategy due to launch by end 2014.”

Media Partners Asia (MPA)

MSky added 198,000 subs in the first half of this year. The Jakarta-based platform's net adds were lower than last year though and MPA says this is likely to stay slow through the second half "due to aggressive low-ARPU competition and piracy".

MPA says Astro's pay-TV growth in Malaysia is softer but that pre-paid platform Njoi and rising ARPU "is helping the company hit its targets". Njoi contributed 90% of Astro's subscriber gains in the company's second quarter.

Excluding Njoi, MPA expects Astro's pay-TV penetration to reach 56% of TV homes by 2018 versus 50% today, largely driven by direct-to-home satellite, with higher ARPU driving earnings.

MPA says Astro management has reaffirmed the company's targeted 80% household penetration by 2017 (25% from Njoi, 55% from pay-TV).

"Scale in revenue, better yields and a stronger value proposition could emerge with the implementation of a new tiering strategy, due to launch by end-2014," MPA says.

Singapore's two platforms – StarHub and SingTel – added 21,000 subs in the first six months of this year, including 19,000 cross-carriage subs. "We forecast ARPU growth at SingTel and bundled broadband + pay-TV growth at StarHub," MPA says.

In Taiwan, cable operators "continue to experience sluggish basic customer growth but are aggressively driving digital set-top box penetration to potentially accelerate premium revenue growth".

"Telco Chunghwa Telecom is unlikely to meet its IPTV subs target in 2014 and is implementing tighter budgetary control," MPA says.

contentasia

Editorial Director

Janine Stein

Assistant Editor

Malena Amzah

malena@contentasia.tv

Research Manager

CJ Yong

cj@contentasia.tv

Editorial Research

Aqilah Yunus

aqilah@contentasia.tv

Design

Rae Yong

Associate Publisher

(Americas, Europe) and VP, International Business Development

Leah Gordon

leah@contentasia.tv

Sales and Marketing (Asia)

Masliana Masron

mas@contentasia.tv

To receive your regular free copy of ContentAsia, please email i_want@contentasia.tv

Published fortnightly by:

Pencil Media Pte Ltd

730A Geylang Road

Singapore 389641

Tel: +65 6846-5987

contentasia.tv

asiacontentwatch.com

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