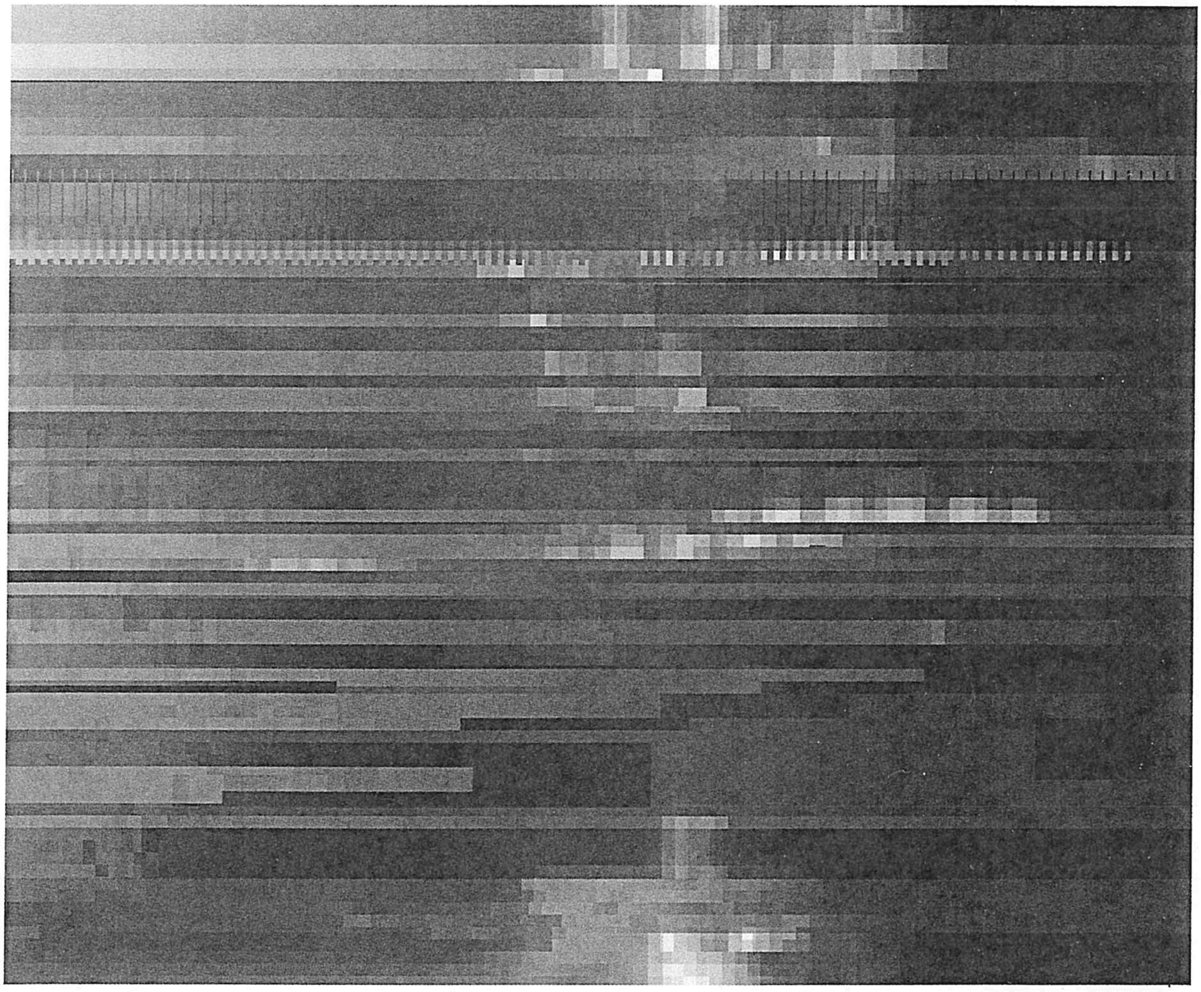
The Routledge Companion to Media Industries



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27

WHEN EAST ASIAN MEDIA INDUSTRIES ARE FACED WITH DIGITALIZATION

Transformation and survival strategies

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Digital media are presenting challenges to traditional media industries, bringing fundamental changes to the ways in which information is created, disseminated, and consumed. By traditional, we refer to the two major media of newspaper and television. On the other hand, digital media refer to prominently internet media outlets, such as video platforms and online news platforms. To name a few, the emergence of social media platforms and video service providers have encouraged the production and consumption of user-generated content. New media consumption methods have appeared, such as viewing programming on tablet computers via video-on-demand services and live streaming instead of the television box (Keane 2016: 5426). These change the practices of journalism as well as how we entertain ourselves. Exciting as it may be to us as an audience, such creative disruptions urge traditional media industries to transform. Newspaper circulation, paid television subscriptions, and advertising income for both newspaper and television were reportedly declining as audience attention floods to the digital space. At its extreme, the digital wave may threaten the long-term survival of traditional broadcasters.

In this chapter, we have collected data about the traditional and digital media industries in three Asian countries: China, Japan, and South Korea (hereafter Korea). In particular, we investigate newspaper publishing and television broadcasting as representative examples of the traditional media industries. In the three countries, these industries have chosen different strategies: some digitalize and migrate in slow and piecemeal manner, while others attempt to maintain dominance through conglomeration. They attempt not only to survive, but to thrive in the digital age.

We propose to understand the current state of the Asian media industry by applying a matrix across two axes: state-supported/commercially driven and political control/economic control (Figure 27.1). Positioning an industry in the matrix interrogates the origin and form of power shaping the transformation of that industry. To locate the origin of the forces behind an industry, the horizontal axis examines whether the industry is supported by state finance or driven by market dynamics. The vertical axis concerns whether control is exerted through political or economic means. This is significant as media industries create not only economic

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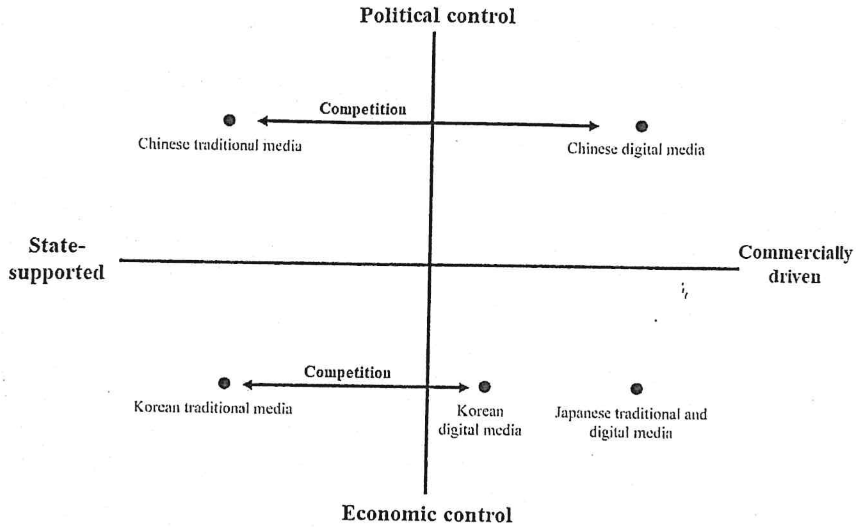

Figure 27.1 Ecology of digital and traditional media.

value but also convey certain ideological values that can shape social culture, challenge the status quo, and thereby create the future ahead. With these axes in mind, we are able to deduce and reason the survival strategies adopted by the three selected countries in the hope of identifying insights applicable worldwide.

China

China has always been in the spotlight of Asian media studies, given its massive population and market opportunity. In 2018, television broadcasting covered 99.25 percent of China's population according to national statistics (National Radio and Television Administration 2018). Since the Maoist era, media were considered tools to enforce the party's ideological hegemony (Lynch 1999). Traditionally, mass media in China were designed and structured as a state propaganda vehicle and mouthpiece for the government and the Chinese Communist Party (Keane and Fung 2018). China's opening-up policies in 1978 prompted reform of the media's role and practices (Kalathil 2002). While control is still exerted from the state, we've witnessed commercialization of the media industries (Kalathil 2003: 491). That said, traditional media industries in China remain under state support and political control, sheltering them from the competition of the digital media industry.

On the other hand, despite visible political control, economic drivers are shaping China's digital media industries. Internet video platforms mushroomed in the dot-com era. Many were peer-to-peer (P2P) platforms that facilitated file-sharing via BitTorrent. The content available was often unauthorized copies of foreign films and television series, which attracted high demand in China due to quota restrictions placed on the import of foreign films. Furthermore, users of P2P networks, especially young audiences, desired more diversified content than was available from the state-approved broadcaster, and so developed the habit of consuming media entertainment online. As other platforms supporting user-generated content emerged, amateur producers found their voice online, while professional creators also launched commercial video-on-demand services (Zhao and Keane 2013). Digital media served as an alternative to traditional media. Among the most well-known sites were Tudou, Youku, and 56.com (Keane 2016: 5432).

As of today, China's digital media industry has acquired a remarkable size. The online video industry benefits from the state's ambition to develop an internet economy and its potential contribution to "cultural system reform" (Li 2017: 395). According to Chinese big data analytics firm QuestMobile (2019), in 2019 the three largest video service platforms Tencent Video, iQiyi, and Youku (the latter following the merger with Tudou in 2012) all possessed a monthly active base of over 40 million users each. These three platforms are owned by China's three digital titans, respectively Tencent, Baidu, and Alibaba. Effectively, a "Chinese-style oligopoly with close connections to the government" had taken form (Keane 2016: 5436). User-generated content platform Bilibili, resembling the Japanese counterpart Niconico discussed later, was also catering for over 9 million active users per month according to its annual report.

Nonetheless, traditional broadcasters in China do not stand still when facing evolving technologies and methods in the production, dissemination, and consumption of information. While the Hu-Wen administration (2003–2013) had attempted integration of traditional and digital media platforms (Repnikova and Fang 2019: 2), a watershed moment came with the "Guiding Opinions for the Converged Development of Traditional Media and New Media" released in 2014 by the Central Leading Group for Overall Reform led by Xi Jinping himself, outlining a vision for building a diverse, modern, and competitive new media system (Yin and Xiang 2017: 99).

Responding to the changing media landscape, newspapers and broadcasters have transplanted their content online to digital platforms for convenient access. A reasonable guess is that these media believe an online presence can retain or attract younger audiences. *People.cn* (2019), the online outlet for China's largest national newspaper *People's Daily*, has identified 97.1 percent of all central and municipal television channels as having a website, while establishing their own platforms and participating in conglomerate video-service platforms. State-owned media are no exception. For example, *People.cn* itself uses a relatively modern interface and includes an online chatroom, as does the web presence of China Central Television (CCTV), the country's largest official channel.

Transplanting content and services online respond to the new consumption behaviors of accessing media through tablets and other mobile devices. By establishing an online presence, broadcasters cater to an audience who may otherwise be lost to pirate sites at the same time as earning income through advertising and subscription revenues. Development of digital media has also encouraged innovative programming and distribution via social media. For instance, Hunan Satellite Television created its digital extension Mango TV (2014–) to act as the official database for the channel's programs. On top of this, the platform utilizes a price differentiation strategy to provide premium services to paid members. While most content is free to watch with advertisements, the premium package offers exclusive behind-the-scenes videos and early access to content.

At the same time, political control hovers over the digital media industry in China. To comply with the obligations for entering the World Trade Organization in 2001, the state had to open the domestic market while at the same time exercising a stronger grip on the new digital media. To combat unauthorized media distribution, many video service platforms were shut down to enforce international standards of copyright. In 2007, regulations were implemented to regulate internet service platforms: for instance, the licensing regime required online video platforms to have an element of state ownership or participation. As a result, most private platforms with unauthorized contents disappeared, for only those with substantial assets and good connections with the government could remain standing. Political control is also exerted over program content. In part, the "Guiding Opinion" stresses the development of "influential and credible" media conglomerates. Liu Qibao, the Head of the Propaganda Department for the Central Committee, explains that the Guiding Opinion serves the purpose of reinforcing ideological promotion and strengthening of the majority opinion (*People.cn* 2014).

Censoring sensitive material by taking-down online postings or deactivating accounts has been discussed in a great wealth of literature. Top-down political pressure and censorship are "unavoidable" in many cases (Zeng and Sparks 2019), but in practice, political control is often manifested indirectly. Video-service platforms avoid political sensitivity by opting for soft uncontentious entertainment and sports content, justifying such choices on the basis of alleged consumer appetite. In news reporting, platforms usually do not attempt to differ from the official perspective. Independent and objective investigative journalism is rare. Nonetheless, despite these limitations, digital outlets can contribute to the liberalization of Chinese media. For instance, by aggregating local news from across China, platforms can bring to national attention issues that may otherwise be left unnoticed.

While video platforms became pioneers in digital media over the past decade, today they are perhaps seen as the status quo. Now they face newfound competition from "self-media" (Repnikova and Fang 2019), in particular micro-video platforms led by companies such as Douyin and Kuaishou. On these platforms, independent creators earn more flexibly than through the conventional advertising and subscription revenues sources, which have previously financed video platforms. Using various business models – such as sponsorship, product placement in videos, and commissioned sales on integrated e-commerce platforms – they are experimenting with far more opportunities than their Western counterparts (Cunningham, Craig, and Lv 2019). These challengers cannot be underestimated.

Japan

Japan is a unique case in Asia, in which traditional media industries, such as newspaper and television, have survived well in a changing media ecology. This can be explained by economic control of the market, which has inherently favored the traditional media. Established media conglomerates have formed a prevailing oligopoly, which gives them an overwhelming advantage over newcomers. Slow adaptation does not acutely threaten Japan's position, unlike the case of South Korea discussed later.

As Hayashi and Kopper (2014: 1136) explain, since the country's modernization, Japanese society has conceived the primary task of journalism to be the dissemination of "practical, everyday-life information." While notions of liberal journalism have been imported, journalism has not served the purposes of motivating political activities or commenting on social affairs. Over decades, legacy broadcasters in Japan established networks across industries, from newspapers and television to radio and publishing houses. These companies have rooted their dominance in newspaper publishing and gradually expanded into other media industries. Structurally, they have diversified to participate in various areas of media production, post-production, advertising, and public relations. Consequently, Japan's media are largely controlled by an oligopoly of five major conglomerates, namely Nikkei, Fuji, the Tokyo Broadcasting System (TBS), Yomiuri, and Asahi.

Previously, digitalization has presented opportunities for established media industries in Japan. In the 1960s, for instance, Japan led Asia in computerizing the newsroom (Lent 1989: 22). In comparison to other Asian countries, however, traditional media such as newspaper and television in Japan has taken a relatively resilient attitude toward the digital revolution (Zhu 2019).

The development of digital media in Japan is mostly commercially driven and caters to the audience's viewing habits. Most television channels in Japan are free-to-air. Viewers have habitually recorded programs, rented physical copies, or watched from pirated sites. Consequently, established consumption practices have prevented audiences from proactively demanding alternative solutions.

Still, as Japanese consumers became early adopters of accessing digital content and communication via smartphones, the mobile ecosystem supported growth in mechanisms for purchasing content online (Steinberg 2019: 166). Audiences have grown more accustomed to watching audio-visual content on personal computers and tablet devices. Streaming technology and the rise of video-on-demand services have therefore posed challenges to traditional television channels. At the outset, changes took place at a slow pace and with low magnitude. Nonetheless, in Japan the digital media industry – defined by consultancy firm MarketLine (2019) as the sector generating revenues from legally downloaded or streamed of music, audio-visual and books content – has experienced continuous growth in recent years. In 2018, the sector reached a total value of $2,455 million, with e-books and video being the leading contributors, respectively accounting for 42.9 and 34.8 percent of the total.

The five major conglomerates (Nikkei, Fuji, TBS, Yomiuri, and Asahi) have their own online presence and provide video-on-demand services for free access to recent television programming, usually from the previous week. These platforms adopt a freemium model, although viewers can purchase a premium, supplementary subscription for unlimited access to older, archival program content. Like the digital media industry in China, some of these platforms also create and disseminate exclusive online content to attract users. For example, Abema TV (2015–), a digital platform launched by Asahi TV, airs some of Asahi's programs before their broadcast premiere, while also offering platform-exclusive content such as interactive variety shows. Most importantly, in October 2015, the five major broadcasters joined forces with four major advertising agencies Dentsu Group, Hakuhodo DY Group, ADK Group, and Tokyu Agency to launch TVer, an advertising-supported streaming video-on-demand service allowing viewers to catch-up on the previous week of programming from the partner networks. Collaborations such as this between the conglomerates effectively raises the entry barrier for any similar services, maintaining their preexisting dominance, a position strengthened by involvement of the advertising agencies. Additionally, the legacy broadcasters also tend to be copyright holders for large libraries of television programs, awarding them enormous bargaining power by holding control over popular content. However, significant competition is presented by the subscription video-on-demand (SVOD) services dTV, owned by telecom giant DoCoMo, and Japanese versions of US services Netflix and Hulu. Nonetheless, the dominance of the five major networks is maintained, and TVer has been described as a "pre-emptive measure" against Netflix and Amazon Prime Video (Sanson and Steirer 2019: 1223). Notably, in Japan, Hulu operates as a separate company from its US mother company, after the Japanese business was sold in 2014 to Nippon TV, the country's oldest broadcaster. These factors all indicate how the dominance of the established oligopoly appears shatterproof.

Apart from accessing video-on-demand services, Japanese netizens also participate in the production and consumption of user-generated content. Aside from YouTube, the key international counterpart, Japan-based Niconico is popular among the youth and ACG (anime, comic, and games) subculture. A distinct feature of Niconico is how rolling comments fly across the screen as videos play, encouraging interactivity amongst viewers. Following merger in 2014, Niconico's mother company – the telecommunication and media firm Dwango – became a direct subsidiary of media conglomerate the Kadokawa Group, which operates across multiple business segments, principally book and manga publishing, and film and anime.

The Japanese case illustrates the enduring and spectacular dominance of legacy media conglomerates. Collaboration between the major players has created a fortress against external competitors, especially foreign ones, maintaining a buffer zone that allows these giants to gradually experiment, grow, and transform through digitalization. Looking forward, it is undoubtedly worthy of our attention to see whether the dominance of the conglomerates will be perpetuated.

South Korea

As with China and Japan, media in South Korea are dominated by a handful of powerful players, namely the four major newspapers (*Chosun Ilbo*, *JoongAng Ilbo*, *Dong-A Ilbo*, and *Munhwa Ilbo*) and four television broadcasters (MBC, SBS, KBS, and EBS). Like their Japanese counterparts, South Korea's media industries are propelled by market dynamics, although we can observe traces of active government initiatives, especially in developing digital media industries as a national strategy.

It may perhaps be surprising to note that the new media industries in South Korea developed relatively late, starting in the 1990s, after the government promoted media literacy in the late 1980s. Development of the internet industry was encouraged and supported as a reparative measure following the 1997 Asian financial crisis and the country's governance has emphasized the sociopolitical importance of information and communication technology (Ok 2011: 321). Korean authorities saw opportunities for promoting the internet industries as an engine for economic recovery, thus leading and facilitating technological infrastructure and human resource development. Today, South Korea is acclaimed as "a strong internet nation" (Kim 2006), becoming the most developed information and communication technology (ICT) country with the highest level of household internet penetration (99 percent) in the world (*Forbes* 2018). It also tops the world in smartphone ownership: 94 percent of the country's population (*The Korean Herald* 2019). Attachment to technology has created a population of fast adaptors with a daily habit of viewing digital media content (Dwyer, Shim, Lee, and Hutchinson 2018: 4556), placing tremendous pressure on traditional media industries to transform.

Conventionally, the press in South Korea have received revenues from newspaper subscriptions and advertising. Major newspapers, especially the original "Chojoongdong" oligopoly, were known to be conservative voices and maintained a close relationship with the governing body (Lee 1997, 2017). Critics have long questioned whether freedom of the press was effectively exercised, given the adherence to the government's political point of view. The emergence of independent online news sites therefore threw down the gauntlet to these giants, including the ideological values they embraced. One example of these new outlets is *OhmyNews*, a citizen-based participatory journalism platform that many Korean citizens regard as a more credible source than the established press (Kim and Johnson 2009).

Apart from the newspapers' content and attitude towards public issues, the method of distribution has also changed materially. Today, news content is circulated via print, the online platforms of the papers, and other internet portals such as Naver and Daum. About 70 percent of Korean people access news via internet portals at least once a week (Reuters Institute 2016: 74), creating a new power relationship derived from the business model of the portals. To explain this phenomenon, we explore the case of Naver, Korea's favorite search engine. Established in 1999 by Naver Corporation, the portal also acts as a news aggregator, so that on its landing page, Naver presents users with news reports collected from multiple media sources. Naver formats the news reports into the site's standard templates while offering auxiliary functions such as comments and sharing via social media (Im, Kim, Kim, and Kim 2011). Assistive functions, such as audio versions of the news articles and adjustable font sizing, improve the user experience. A reader can complete their daily news update without ever leaving the Naver portal, although links to the websites of the source newspapers are also provided. Featuring on Naver is therefore crucial to a newspaper's exposure, and in some cases also its survival.

When a piece of content is read on an external portal, the newspaper company responsible for the original story only earns a "content fee," a standard charge for the piece of content that does not account for advertising income (Hong, Nam, and Kim 2018: 1721). When a viewer only reads articles on Naver, their intention to purchase a paper copy of the newspaper or visit a newspaper's website decreases. As a result, internet portals have brought a devastating blow on the subscription and advertising revenues of newspaper corporations. According to one estimate, newspaper subscriptions halved from 2011 to 2016, and only a quarter of the Korean population remained newspaper readers (Reuters Institute 2016).

The growth of digital media industries has also encouraged the transformation of broadcasting in South Korea. Broadcasters in Korea have depended on three income sources: TV license fees or public funds, subscriptions, and advertising. Among these, the former account for around 40.5 percent of income (MarketLine 2015a). Due to political and policy support, the networks are partially shielded from fierce competition, contributing to the quasi-monopoly formed by the legacy broadcasters.

South Korea is one of the earliest markets to experience competition in online video services (Park 2018: 4647). One interesting feature of the Korean digital media industry is the large number of participants, including telecommunication companies, IPTV providers, traditional broadcasters, and independent web-based over-the-top (OTT) service providers. South Korea is home to Pandora.tv, created in 2004 and allegedly the world's first user-generated video portal platform (Dwyer, Shim, Lee and Hutchinson 2018). Pandora's competitor, Afreeca.tv, entered the market in 2005, three years earlier than YouTube's launch in South Korea. A similar pattern is observed for commercial OTT services. Video portal Naver TV was launched in 2013. Similarly, Kakao TV (a subsidiary of the internet company Kakao, and offered as a feature of KakaoTalk, Korea's most popular instant messaging app) was launched in 2015 and later merged with an even earlier competitor Daum TV Pot, launched in 2007. These developments therefore preceded Netflix's entry in 2016. Launch of these services was encouraged by the relatively looser regulations and greater flexibility applied to OTT providers than regular broadcasting channels (Hsu, Liu, and Chen 2016: 5).

Despite their early entrance, OTT services fought a tough, though not impossible, battle to secure an audience base as legacy broadcasters defended their market cautiously and proactively (Dwyer, Shim, Lee, and Hutchinson 2018). Korea has one of the highest pay-TV penetration levels (172.9 percent)[1] in the Asia-Pacific region (MarketLine 2015b), and adding a digital platform is a natural extension for existing customers (Park 2017). Utilizing a vertical integration strategy, these broadcasters develop their respective platforms to provide video-on-demand and online streaming services. Similar to Japan's TVer, South Korea's four major terrestrial broadcasters (KBS, MBC, SBS, and EBS) formed an alliance to launch the video-on-demand platform POOQ. Audiences do not therefore leave a broadcaster's embrace when switching devices, which Park (2018) denotes as their "N-Screen Strategy": providing services across multiple screens. This model competes well with other services such as Netflix due to the competitive pricing strategies of broadcasters and audience preferences for national or local content (Dwyer, Shim, Lee, and Hutchinson 2018: 4561). In late 2019, POOQ sealed it's dominance by merging with the existing market leader OKSUSU to form WAVVE. Together, they represent 46 percent of subscriptions amongst the top five paid OTT services in Korea (KCC 2019).

As in Japan, South Korea's legacy broadcasters have leveraged their existing leadership to establish dominance in the digital media environment. Still, there remain more competitors for viewers than in the Japanese context. Some experience first-mover advantages, while others derive strength from powerful mother companies such as the electronics manufacturer LG or leading telecom companies. As a nation of technological pioneers, it is exciting to see what will be next for Korea's media industries.

The digital challenge: cooperation and absorption

Worldwide, digital newcomers are presenting a potentially disruptive challenge to traditional media industries. Faced with changing audience behavior and advancements in information technology, media industries cannot remain static. In this chapter, we suggest that by focusing on two dimensions, namely the origin and nature of control, it is possible to understand holistically how East Asia's traditional media industries have negotiated digital transformation and adaptation.

Despite differences in these dimensions, similar strategies have been identified among the three countries studied. Common to successful transformation is an active strategy of vertical integration to establish the presence of a media companies across platforms and devices, with expansion into other platforms necessary to capturing changes in readership and audience viewing preferences. At the same time, experiences have varied between countries in light of their differing circumstances. For instance, the launch of digital platforms by Japan's legacy broadcasters has proved successful in excluding competition and maintaining their long-established dominance, and yet the same strategy has been less effective in Korea because of the early appearance and relative strength of new entrants. China's government supports state-run broadcasters and a handful of selected others, enabling these to flourish while restraining media coverage of sensitive topics and encouraging adherence to the Party's perspective. The flipside is perhaps the Korean newspaper industry, which has experienced huge crisis in the changing mediascape despite attempts to embrace digitalization.

Conglomeration is also a crucial factor in preserving existing patterns of dominance when transitioning into the digital era. Media conglomerates bind together precious resources while excluding smaller competitors. Japan serves as a prime example for such a mechanism, where the dominance of the leading networks has created a buffer, mitigating the relatively slower pace of digital transformation among Japanese broadcasters. Similarly, in the case of South Korea, we witness how mergers and alliances between conglomerates has allowed traditional broadcasters to establish a major online presence despite launching online video-on-demand services later than independent, third-party service providers. In China, state-support has enabled broadcasters to assert their dominance, and now in the digital scene, the BAT (Baidu, Alibaba, and Tencent) technology giants stand side by side with the broadcasters, developing their strength from the massive capital resources and customer bases of their mother companies. Market dynamics have had a stronger influence online than offline, although political control should not be brushed off lightly and is especially apparent in the selection of who remains in the digital arena.

Strategies adopted by the East Asian media industries are certainly not unique but are incidental to technology trends and so can offer insights relevant to other contexts. Many of the developments we've observed root themselves in infrastructural conditions, such as high broadband penetration and widespread mobile usage. Equally, where audiences acquire online viewing habits and familiarity with the necessary technology, it is easier for traditional broadcasters to construct an online presence. In contrast, audience tastes in favor of local content increase the bargaining power of traditional broadcasters. Owning copyrights for popular content exerts a prevailing advantage over third-party platforms, especially foreign players.

What could be next for East Asia's media industries? Consultancy companies such as Reuters and MarketLine expect continuous moderate growth (Reuters Institute 2016; MarketLine 2019), and we are thrilled to witness a vibrant and diverse digital mediascape, particularly as fresh forms – such as user-generated content and social media entertainment – compete for audience eyeballs. Catering to markets and audiences, digital media have to a certain extent eroded the legitimacy and influence of traditional media in East Asia, at least in the cases of China and South Korea. In theory, therefore, those who are slow to innovate and insensitive to developing trends risk being swallowed by the everchanging tides. Yet in practice, a quite contrary picture emerges, with existing power players continuing their dominance protected by state influence, or by effectively employing strategies to expand and diversify in the digital economy.

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Appendix

Table 27.1 Major media outlets in China, Japan, and South Korea

Country	*Name*	*Established*
Traditional television broadcasters		
China	Beijing Television	1958
	China Central Television	1958
	Zhejiang Television	1960
	Hunan Television	1997
	Jiangsu Television	1997
	Dragon Television (Shanghai)	1998
Japan	NHK (Japan Broadcasting Corporation)	1950
	TBS TV (under Japan News Network)	1951
	TV Tokyo (under the TXN Network)	1951
	Nippon TV (under the Nippon News Network)	1952
	Fuji TV (under the Fuji News Network)	1957
	TV Asahi (under the All-Nippon News Network)	1957
South Korea	Korean Broadcasting System	1927
	Munhwa Broadcasting Corporation	1961
	Educational Broadcasting System	1980
	Seoul Broadcasting System	1990
Digital broadcasters		
China	Le.com (previously LeTV)	2004
	PPTV	2004
	Sina Video	2004
	TV.Sohu (acquired 56.com in 2014)	2004
	56.com	2005
	Mango TV	2006
	Youku	2006
	Tudou	2005
	AcFun	2007
	CNTV	2009

Table 27.1 Cont.

Country	Name	Established
	Bilibili	2010
	iQiyi	2010
	Tencent Video	2011
Japan	NicoNico	2006
	NHK On Demand	2008
	テレ朝キャッチアップ (TV Asahi Catch App)	2009
	テレ朝動画プレイヤー (TV Asahi Video Player)	2009
	*日テレオンデマンド (Nippon TV On Demand)	2010
	Business On Demand	2013
	日テレ無料 (TADA)	2014
	dTV (previously dVideo powered by BeeTV)	2015
	Fuji On Demand	2015
	TBS Free	2015
	Tver	2015
	テレ東動画 (TV Tokyo Video)	2015
	Abema TV	2016
	Paravi	2018
South Korea	Pandora TV	2004
	Afreeca TV	2005
	B TV Mobile	2006
	Gom TV	2006
	Daum TV Pot*	2007
	Kakao TV (Integrated with Daum TV Pot in 2018)	2015
	U+ HDTV	2007
	Everyon TV*	2011
	Hoppin	2011
	POOQ*	2011
	Olleh TV	2011
	Tving	2011
	Naver TV	2013
	Hyundai HCN Mobile TV (Replaces Everyon TV)	2019
	WAVVE (previously POOQ)	2019

* Discontinued as of February 2020.

Source: Authors' compilation from multiple sources.

Note

1 This exceeds 100 percent as subscriptions to multiple channels are counted.

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