

STATE OF PIRACY IN APAC



In an exclusive interview, Matthew Cheetham, General Manager at AVIA's Coalition Against Piracy, and Olivier Biot, Solution Marketing Manager at NAGRA, delve into the dynamic landscape of anti-piracy efforts in the Asia-Pacific region. They discuss the strategies, evolving piracy trends, challenges posed by social media, and importance of education in fighting piracy, emphasizing the need for collaborative actions to preserve the integrity of the region's video industry.

TACKLING PIRACY IN THE ASIA-PACIFIC REGION

[Olivier Biot] Can you tell us about AVIA CAP and how you are involved in anti-piracy in the region?

[Matthew Cheetham] The Asia Video Industry Association (AVIA) is the trade association for the video industry and ecosystem in Asia Pacific. The Coalition Against Piracy (CAP) oversees a comprehensive anti-piracy strategy, based on four pillars: collaboration; research & technology; enforcement & disruption, and outreach & engagement.

CAP undertakes numerous enforcement activities around the Asia-Pacific region, as well as being extensively involved in lobbying efforts to improve the laws and regulations protecting content.

[O.B.] AVIA CAP's research shows diverse piracy forms in the region. NAGRA also undertakes their own research which shows Control Word Sharing seems to prevail in Philippines and Malaysia, while streaming dominates more in countries such as Vietnam and Thailand due to higher broadband access. How will this trend evolve?

[M.C.] Understanding how consumers access pirated content is crucial for effective enforcement. A key part of CAP's program is research and includes annual surveys in eight regional countries. These surveys reveal that social media and messaging platforms have been primary sources of pirate content access for the past two years. Notably, pirate streaming sites, ISDs, and apps remain popular. Additionally, outside of the surveys, anecdotal evidence suggests the growing popularity of pirate IPTV services due to their low cost, combined with a vast choice of content offerings including content not available in their specific geographical areas.

Incidence of Consumer Piracy in Asia-Pacific – including Year on Year Change



Figure: Consumer access of pirated content across APAC

[O.B.] Based on NAGRA's piracy monitoring campaign in the region, there are clear winners when it comes to "preferred" hosting services for pirates' websites. What is your view on the role of these hosting companies to help shut down illegal services?

[M.C.] Some intermediaries collaborate positively with rights holders against piracy, while others don't. Globally, rights holders have used criminal, civil enforcement, and site blocking actions against them. In the Asia-Pacific region, similar actions could be employed against uncooperative website operators.

[O.B.] AVIA CAP's recent survey reveals substantial piracy on social media in Asia. Aside from well-known platforms, how many allow direct content access, and how does your collaboration work in shutting them down?

[M.C.] Social media and messaging platforms are major avenues for accessing pirated content in the region, especially live content. We maintain

constructive engagement with key platforms, Google and Meta, through regular calls and roundtables with CAP members and their copyright executives. However, piracy, especially of live content, remains an ongoing challenge.

[O.B.] How does social media piracy truly affect operators? Are those consuming "free" pirate content on social media likely to transition to paying for legitimate IPTV subscriptions?

[M.C.] Pirated content will always be inferior to legal content, especially in live content where stream quality is subject to pop ups or buffering, making the viewing experience a frustrating one. Numerous CAP research papers have also shown that in addition consumers are increasingly at real harm of being infected with malware or viruses. We also have regular surveys that show consumers in Asia-Pacific are more than willing to pay for content if what they want isn't available via legal channels.



"There is no single best way to tackle piracy, it requires a multi-faceted approach using all tools at our disposal."

- Matthew Cheetham

[O.B.] Based again on our piracy monitoring campaign, most pirated channels are usually sports-related, with illegal services being accessed worldwide. What is in your view the best way to legally tackle piracy with such a wide reach?

[M.C.] There is no single best way to tackle piracy, it requires a multi-faceted approach using all tools at our disposal, and including collaboration of rights holders, industry players – particularly technology vendors - and governments. One thing is certain, however, that piracy is impacting bottom lines as insufficient resources are often allocated to combat it, due to lack of understanding or acknowledgement of piracy by concerned parties.

[O.B.] Illegal techniques used by pirates are evolving quickly. While NAGRA can provide solutions such as NAGRA Security Monitoring & Analytics or Watermarking to identify, measure and disrupt those illegal services, the industry often faces a lack of understanding from Operators on where piracy is coming from. How can we improve education for all affected parties in the region to address piracy more effectively?

[M.C.] Education across the content industry, including operators, about piracy's evolution and impact remains crucial. In the era of online content, piracy is a formidable rival.

AVIA conducts regional seminars, often centered on piracy. CAP hosts two annual piracy-focused seminars (State of Piracy and Piracy Over the Top). Operators should personally attend these events, gaining insights into piracy's challenges, business impact, effective countermeasures, and the best ways to deal with it.

[O.B.] Do you feel all operators in the region have the necessary tools, technology and understanding on how their revenue is impacted? What would be the first step in helping them understand the amount of piracy-related fraud impacting their service and revenues?

[M.C.] No, many operators do not. Whether that is because they are unaware of the size of the problem of online piracy and the impact on their revenues, or they are unwilling to acknowledge just how big it may be, I am not sure. However, as noted above, there can never be enough education about the impact of piracy, particularly in these days of heightened economic uncertainty.

[O.B.] As a final question, do you think we need a specific approach against piracy in APAC compared to other regions?

[M.C.] Yes and no, the tools we have at our disposal are largely capable of being adapted to address piracy in any country in APAC. However, careful care and consideration does need to be given to which tools are most effective and efficient to address the relevant online piracy issues of any given country, and also taking into account any language and cultural differences.



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About NAGRA Anti-Piracy services

Whether your organization's internal anti-piracy team is small or large, NAGRA Anti-Piracy Intelligence and Investigations Services have the capability to help you inform and execute an anti-piracy strategy that achieves your objectives. From the intelligence to identify, prioritize and track pirate offenders to the technical information to understand their operational footprint, and the full legal support for successful prosecutions. Our anti-piracy experts are standing by to discuss how we can help. Visit [NAGRA Anti-Piracy Services](#) and [Active Streaming Protection](#) for more information.



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About AVIA's Coalition Against Piracy

The Asia Video Industry Association ([AVIA](#)) is the trade association for the video industry and ecosystem in Asia Pacific. It serves to make the video industry stronger and healthier through promoting the common interests of its members. AVIA is the interlocutor for the industry with governments across the region, leads the fight against video piracy through its Coalition Against Piracy (CAP) and provides insight into the video industry through reports and conferences aimed to support a vibrant video industry.



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