THE WAR ON VIDEO PIRACY

Protecting your content

SES

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Asia-Pacific's online piracy
worldwide ranking[1]

$51.6B

Projected worldwide piracy
revenue in 2022[3]

Digital piracy is a growing concern worldwide, especially in Asia-Pacific, with its online piracy ranking surpassing North America in 2018[1]. In 2017, 300.2 billion visits to illegal torrent websites for TV and film, music, publishing and software downloads were recorded globally[2].

Industry players such as broadcasters, pay-TV operators, content providers and distributors are on the frontline as pirates siphon billions of dollars from the video industry. Revenues lost to online piracy totalled USD 37.4 billion worldwide in 2018 and is expected to snowball into USD 51.6 billion by 2022[3]. Asia-Pacific is expected to account for USD 20 billion of these illicit earnings[3].

In this eBook, we identify the reasons behind the prevalence of piracy in Asia-Pacific, and explore the impact of increasing piracy rate, what governments are doing to quell these digital pirates, how industry players can expand their purview in safeguarding precious content through technology and the role consumers play in combatting piracy.

1. Business Insider Singapore | Piracy concerns rise in Asia as Android set-top boxes gain popularity – here's what an expert says needs urgent addressing
2. MUSO: Global Piracy Increases Throughout 2017, MUSO Reveals
3. Digital TV Research 2018

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9.6B

illegal movie and TV series downloads in 2017[6]

Digital piracy is the illegal act of reproducing, distributing and consuming copyrighted digital materials without the permission of the copyright holder[4]. The digital piracy landscape has evolved from low-quality and difficult-to-use services to easily accessible high-quality video content. Today, consumers typically pirate for TV series and dramas (27%); latest movie releases (21%); and live sports (16%)[5].

Digital pirates can access content illegally via various platforms, with the top three popular platforms being unlicensed streaming platforms (79%), peer-to-peer (P2P) downloads (57%) and IPTV piracy via illicit streaming devices (ISDs) (45%)[6]. Other forms of piracy include signal piracy via cloned cards, pirated DVDs and USB storage, and recording on screen[5].

Usage of ISDs in Asia-Pacfic[6]

45%	34%	28%	24%
THAILAND	TAIWAN	PHILIPPINES	HONG KONG
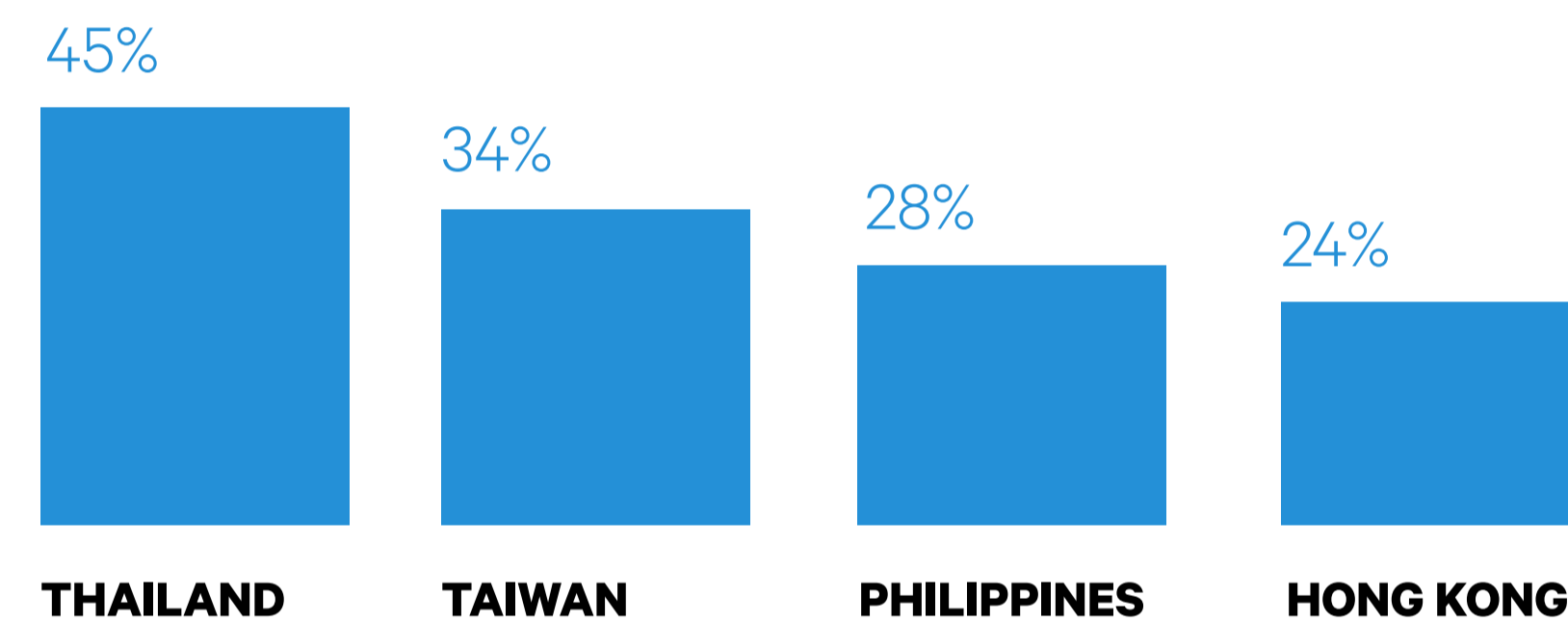
Top 10 countries with the most visits to unlicensed streaming platforms[6]

1. USA (27.9B)
2. Russian Federation (20.6B)
3. **India (17B)**
4. Brazil (12.7B) visits
5. Turkey (11.9B)
6. **Japan (10.6B)**
7. France (10.5B)
8. **Indonesia (10.4B)**
9. Germany (10.2B)
10. United Kingdom (9.0B)

27%
of unlicensed visits are from Asia-Pacific
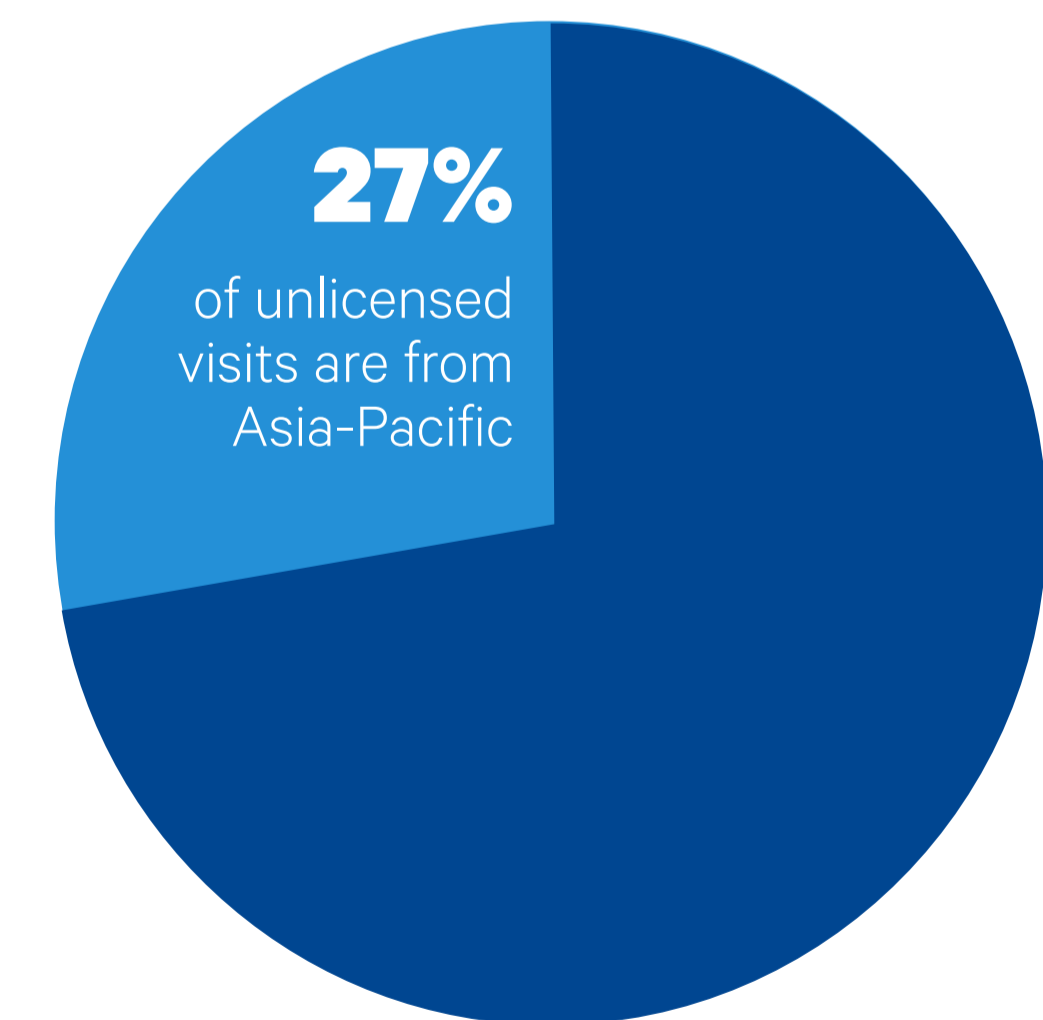
4. Online Library | "Digital Piracy" in: The Encyclopedia of Criminology and Criminal Justice
5. Irdeto: Global Consumer Piracy Survey Report
6. AVIA: The Video Industry Report 2019

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Consumers' motivation to pirate stems from the lack of video content variety on legitimate subscriptions at an affordable price.

The growing number of illegal platforms is an indication that digital piracy is often triggered by the lack of legitimate supply to consumers' video consumption demands. This has led to consumers turning to illegal content which are easily and widely available.

According to the 2017 study done by MUSO—global authority on digital piracy, 83% of all film, TV Series, and music piracy in the UK can be attributed to one main reason: cost[7]. Cost was listed by more than a third of study participants as their reason for pirating content—the cost for obtaining the content they wanted legally was unaffordable.

Another reason cited was the lack of desired content on their existing subscription services or channels—the same reason cited by consumers in Asia-Pacific for taking the piracy route[8].

One important contributing factor to the growing number of digital pirates is the rampant use of ISDs—pirate streaming boxes paired with infringing add-ons, which allow consumers to access unauthorised premium TV channels, latest movie releases and live sports channels. The device is bundled with a subscription fee and offered to consumers at a one-off price that is cheaper than legitimate ones. Due to ISDs being openly and widely made available, a significant number of ISD users have taken to believe that they are watching legal content, as the ISD salespersons have inaccurately vouched for their legitimacy.

7.   Digital Music News: 83% of All Music, Film & TV Piracy Is Motivated by a Lack of Paid Options, Study Claims
8.   The Straits Times, Singapore: 40% in Singapore watch pirated content: Study

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# DIGITAL PIRACY IN ASIA-PACIFIC: IMPACT ON INDUSTRY PLAYERS

Digital piracy affects industry players through revenue loss from decreasing new and existing pay-TV and over-the-top (OTT) subscribers. Globally, digital piracy is estimated to cost pay-TV and OTT operators USD 9.1 billion in lost revenue in 2019[6]. This number is expected to reach USD 12.5 billion by 2024[6].

Pay-TV piracy, is on the rise globally, notably in Asia-Pacific and Latin America with an estimated USD 7 billion per year lost in unrealised pay-TV operator revenues in 2017. Asia-Pacific accounts for USD 1.6 billion per year revenue loss due a fall in overall pay-TV subscriber numbers, fuelled by improved broadband access and growing ownership of ISDs[9].

The creative content industry is also badly hit by the economic impact brought on by digital piracy. There is little incentive for the industry to grow and innovate.

Number of pay-TV subscribers lost to ISDs[6]

21%	THAILAND
16%	TAIWAN
13%	PHILIPPINES
10%	HONG KONG
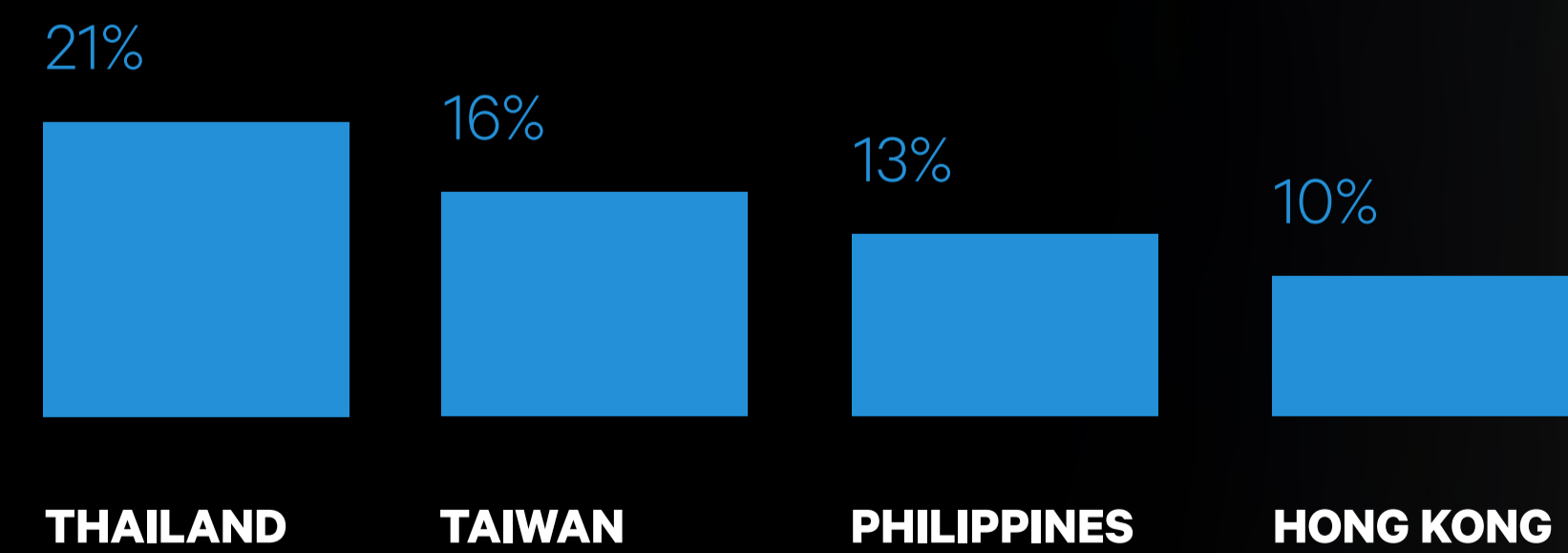
9. NAGRA | MTM: The Global Pay-TV Innovation Landscape: Industry Perspectives on a Year of Change

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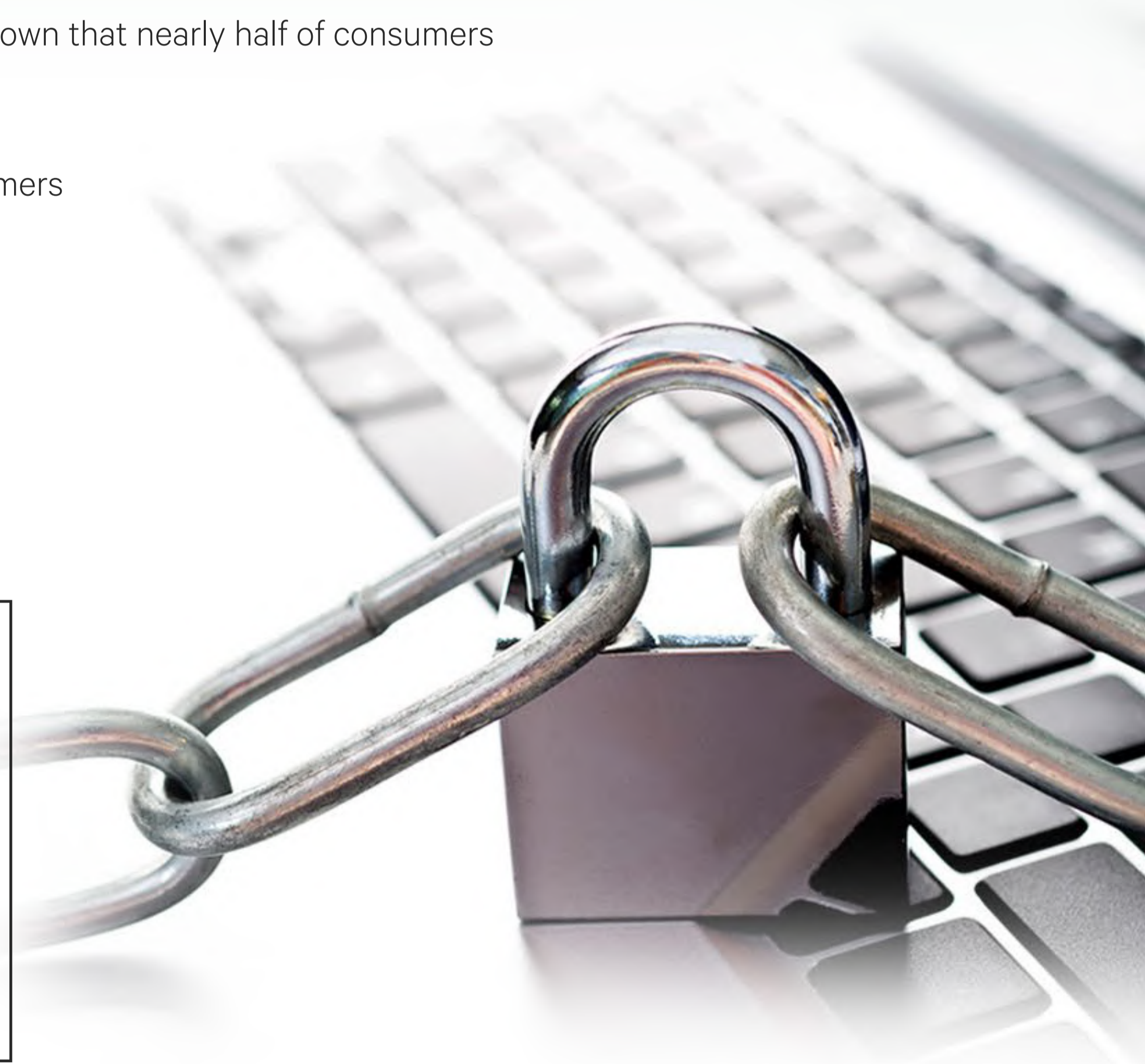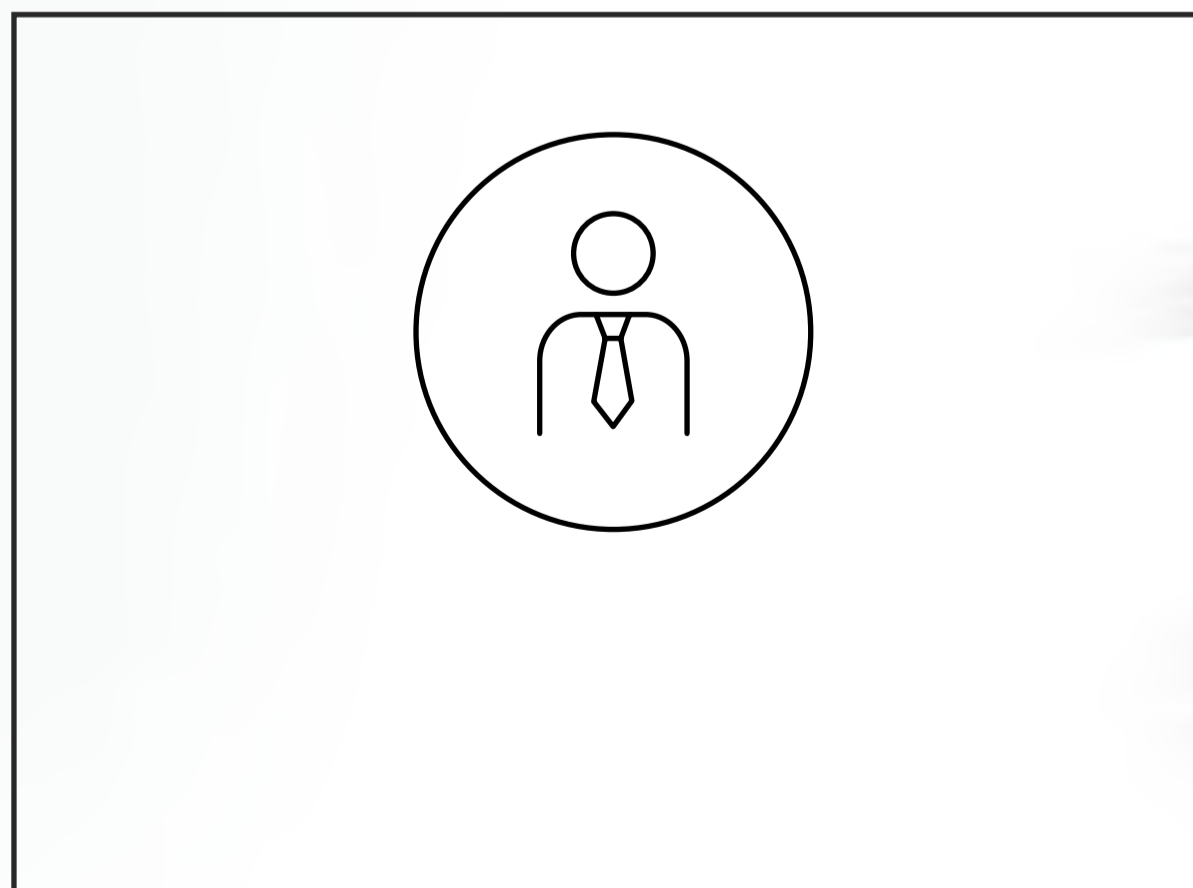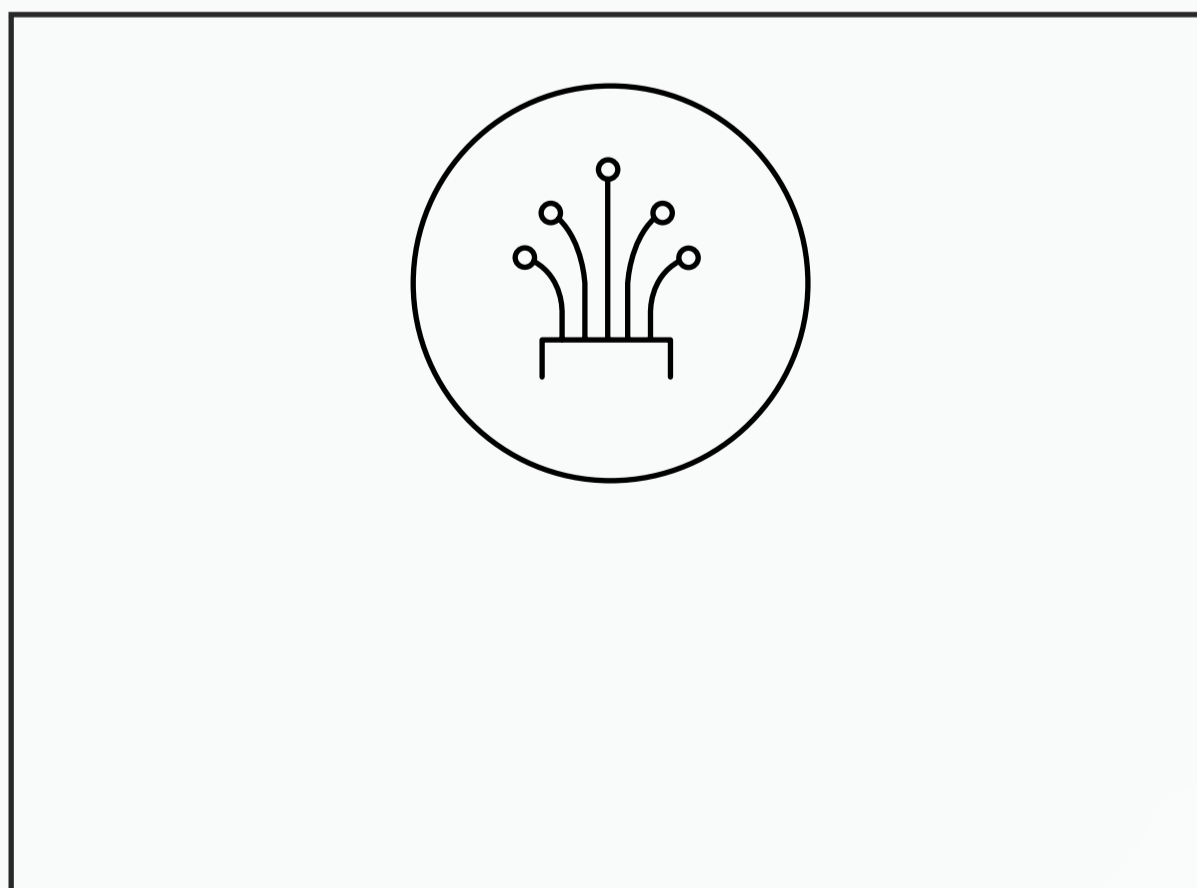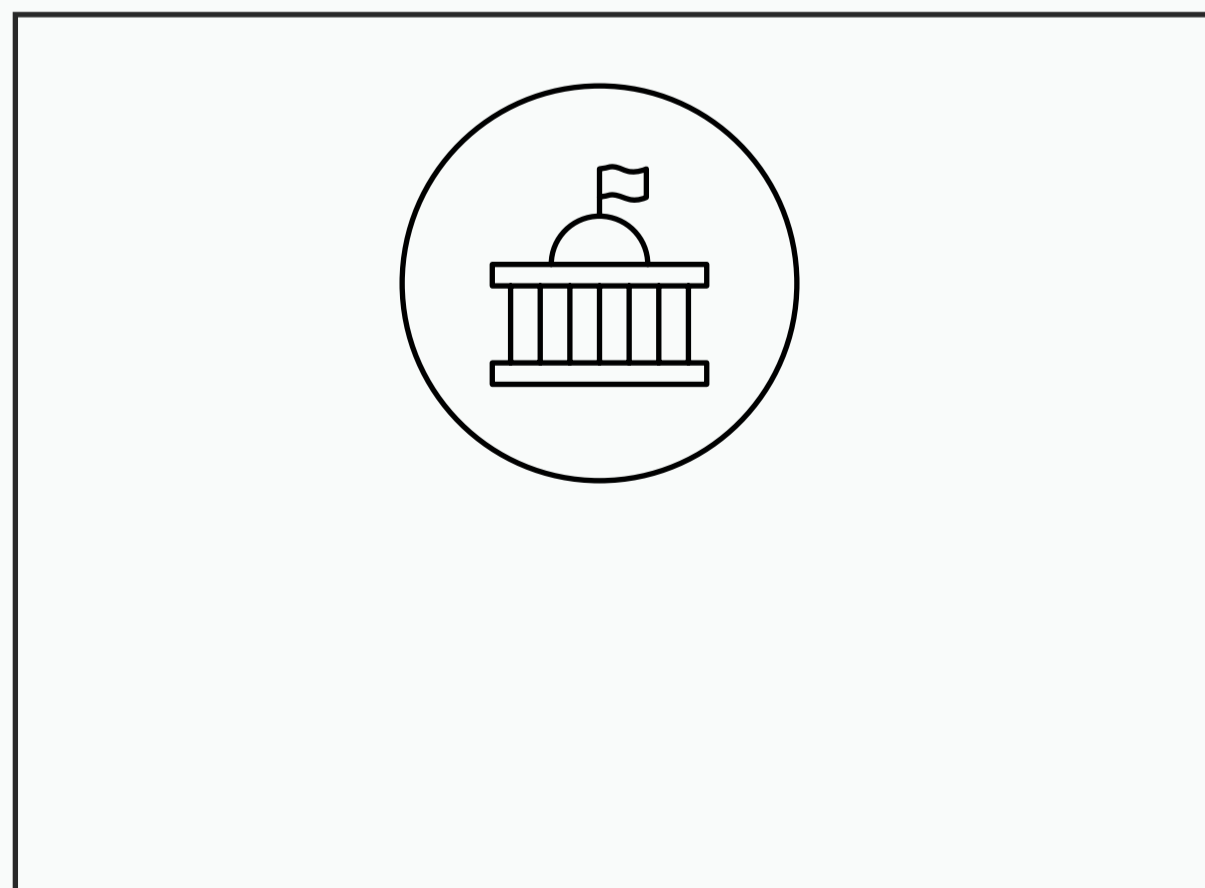# MULTI-PRONGED APPROACH TO CRACK DOWN PIRACY

Curbing piracy requires a multi-pronged approach which includes cooperation from various stakeholders.

Consumer education on the negative impact of piracy would help to discourage them from accessing content illegally. Research has shown that nearly half of consumers would stop watching or watch less illegal content after they are made aware of the damage that piracy inflicts on the media industry[4].

Industry players can also curb demand for pirated content by making legitimate content more accessible and affordable to their consumers to discourage piracy.

Most importantly, consumer cooperation and industry-wide collaboration would be most effective with a multi-faceted approach, including deploying anti-piracy technologies and services, as well as lobbying for policy changes.

Explore the various measures taken by the various stakeholders.

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INDIA
The government issued an order for ISPs to permanently block key pirate sites across the country. Consumers caught watching pirated content also face punishment, including fines[10]. In addition, consumers caught watching pirated content are punishable by law with imprisonment from six months to three years and a fine between Rs 50,000 to Rs 200, 000 for first time offenders[11].

10.   Torrentfreak: Pirate Bay, RARBG, 1337x & Torrentz2 to be Permanently Blocked in India
11.   The Better India: Still Downloading or Streaming Pirated Content? You Need to Know This About Content Piracy Laws in India!

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MYANMAR
For infringement of copyright in television and video productions, The Television and Video Law states that the offence of copying, distributing, hiring or exhibiting a censor-certified video tape, for commercial purposes, without the permission of the license holder, is punishable with imprisonment of up to three years, or a fine not exceeding Kyats 100,000 or both[12].

12. WIPO: ASEAN Study - Myanmar

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HONG KONG
Hong Kong penalises offenders with large fines and jail time for acts of content piracy—an ISD reseller was sent to jail for 21 months after being convicted of copyright and conspiracy to defraud offences[13]. Shortly after, island authorities embarked on Operation Trojan Horse and raided four premises earmarked as suspected sites for selling configured ISDs.

13.   AVIA: Selling Illicit Streaming Devices (ISDs) In Hong Kong Is Illegal

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PHILIPPINES
Under the Cybercrime Prevention Act, acquiring any digital copy of any copyrighted material is punishable by a fine between Php 200,000 (US$4,470) to Php 500,000 (US$11,175) and six to 20 years of imprisonment[14].

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14. Tech in Asia: With new Cybercrime Law in place, Filipinos could face jail time for piracy

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MALAYSIA
Under Malaysia's Copyright Act 1987, content pirates guilty of reproduction of copyrighted content in whole or in part will be held liable to a fine ranging between 10,000 to 100,000 ringgit or imprisonment for a term not exceeding five years or both[15]. Pirate site visits had plunged 74% within six months after the government blocked pirate websites under the provisions of the Communications and Multimedia Act 1998 in June 2016[16].

15. New Straits Times: Beware, digital pirate
16. Amazonaws: International Property Rights Index

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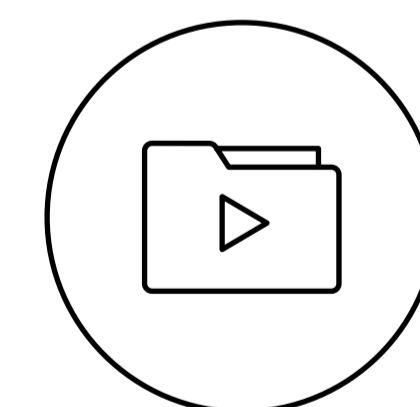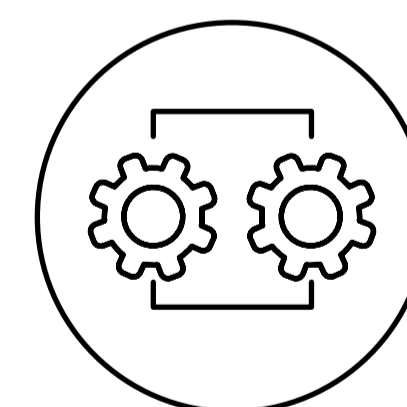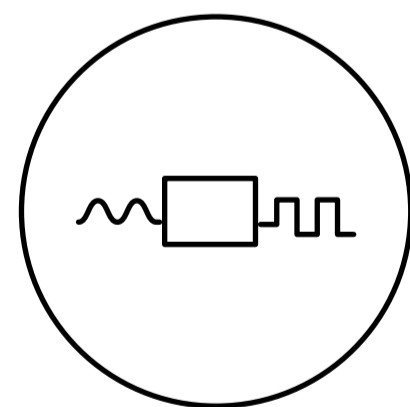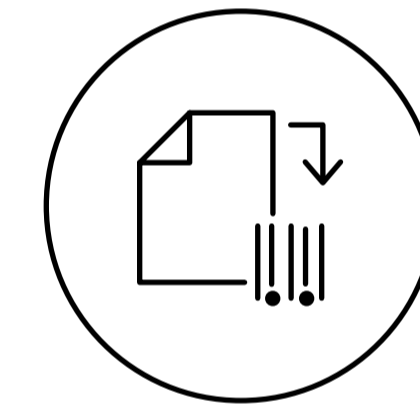CONSUMER COOPERATION

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SINGAPORE

In 2018, the Singapore High Court passed a 'dynamic injunction' order and blocked access to 53 infringing websites[17]. In the same year, the court took further actions and instructed local ISPs to block access to illegal applications which are frequently pre-loaded on ISDs to stem piracy[18].

The Singapore Copyright Act also states that it is a criminal offence for a person or company to conduct willful copyright infringement. The statute of limitations for copyright infringement in Singapore is six years[19].

17. TODAY Singapore: Court order makes it easier for copyright owners to curb access to piracy websites
18. AVIA: High Court grants order to block access to illegal applications on TV boxes
19. GuideMeSingapore: An Introduction to Copyright Law in Singapore

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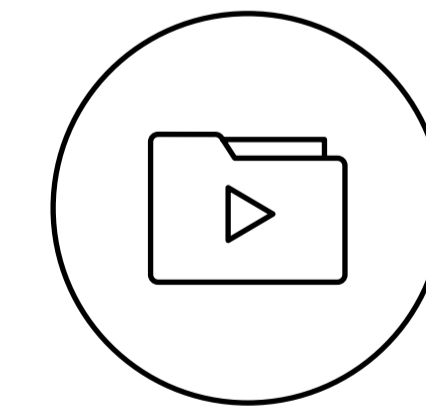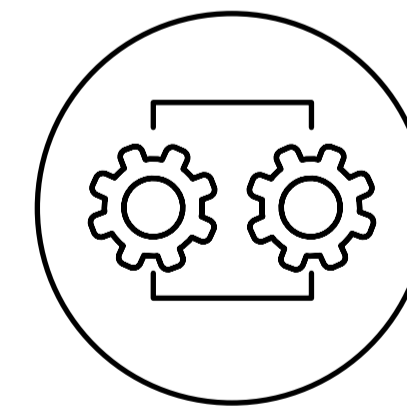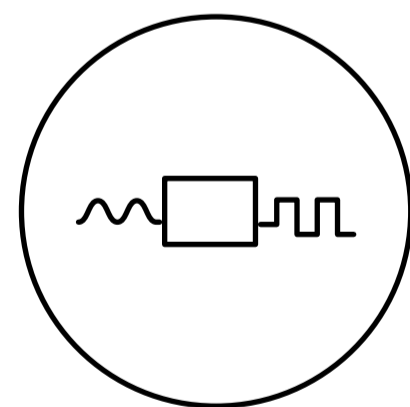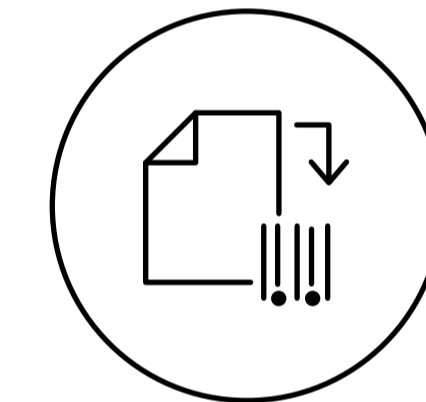USING TECHNOLOGY

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AUSTRALIA
The Federal Court of Australia ordered the blocking of 59 pirate sites under the Copyright Amendment (Online Infringement) Act in August 2017 and has seen a reduction in illegal piracy and streaming by 25%, and a reduction of 53% among sites specifically blocked by Australian ISPs ever since[20].

20. News Corp Australia Network | 'Shamelessly facilitating crime': Rights holders hit out at Google amid renewed Aussie piracy fight

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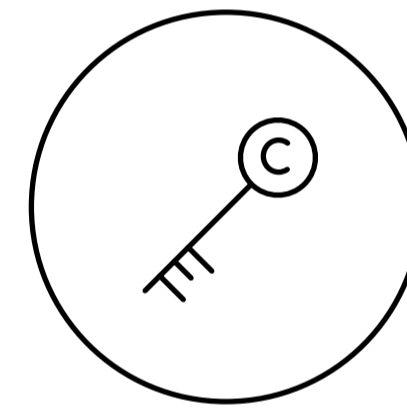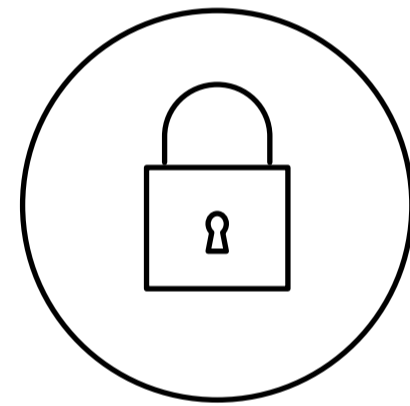USING TECHNOLOGY

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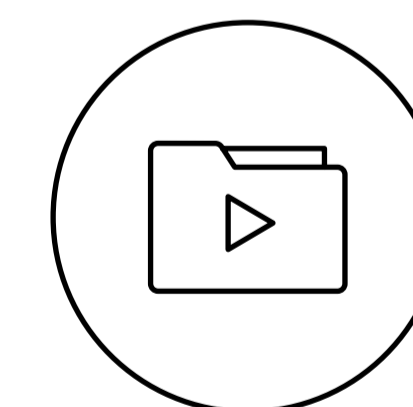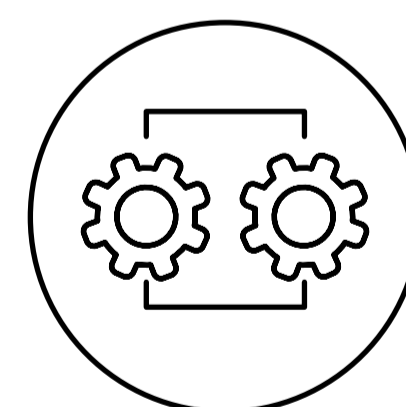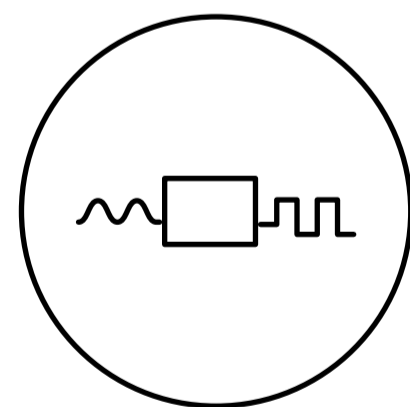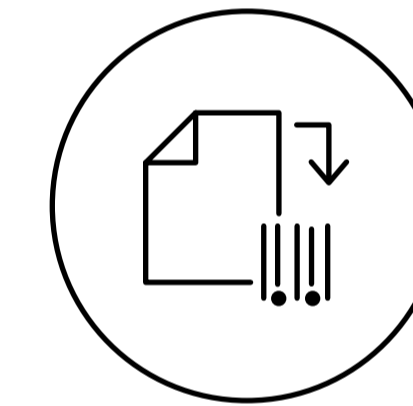# COUNTERING PIRACY USING TECHNOLOGY

Anti-piracy technology is one of the game-changers for industry players to safeguard content and deter pirates from reproducing copyrighted content through numerous anti-piracy technologies.

Explore the different anti-piracy technologies below.

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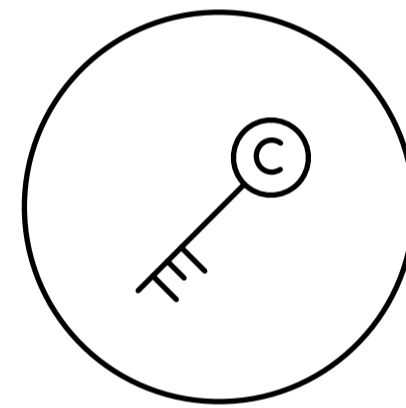TO CRACK DOWN PIRACY

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DIGITAL RIGHTS MANAGEMENT (DRM)[21]
DRM is a technology that secures premium content on any device, in any delivery format by assigning an encryption key to a content, which works only when the content is accessed from an approved platform. With increasing demand for Ultra HD (UHD) content, OTT operators can combat piracy by receiving real-time actionable insights from the analytics console of their DRM solution and constantly upgrade the encryption to deter content theft.

21.   CASBAA: Asia Pacific Multichannel TV 2018

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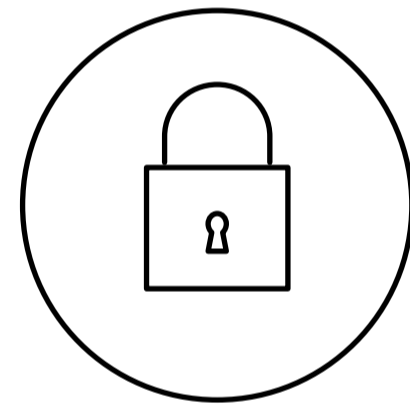TO CRACK DOWN PIRACY

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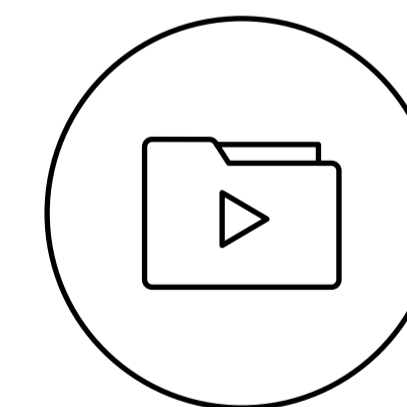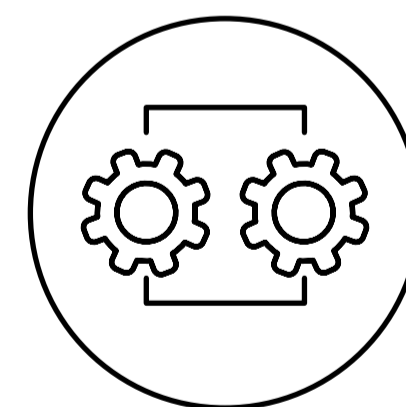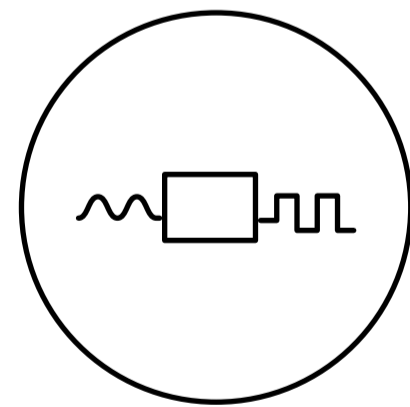
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WATERMARKING[22]
Watermarking content can stop pirates from passing off stolen content as their own. Dynamic watermarking is a tool that involves adding a layer of security to content, such as a name, IP address, or date. This stops consumers from recording or sharing the video illegally. When pirates remove a watermark, the video quality is compromised, rendering it unusable.

22. Muvi: Deter Piracy with Dynamic Watermarking

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ARTIFICIAL INTELLIGENCE (AI)[23]
With AI, content providers can use content monitoring solutions to sift the web for pirated content, and detect unusual activity on an account to uncover users who illegally share credentials to access streaming services—on both pay-TV and OTT platforms. Convolution neural networks, an AI tool, can be used to track illegal content through identifying distinctive components of the original video.

23. News18: Sharing Your Netflix Passwords With Friends? AI Can Now Track Illegal Sharing of Accounts

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MULTI-PRONGED APPROACH
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CONFRONTING PIRACY
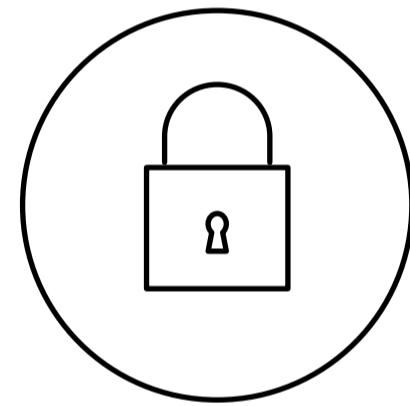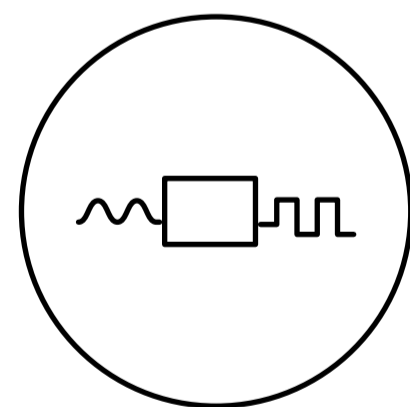WITH LEGAL MEASURES

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Anti-piracy technology is one of the game-changers for industry players to safeguard content and deter pirates from reproducing copyrighted content through numerous anti-piracy technologies.

Explore the different anti-piracy technologies below.
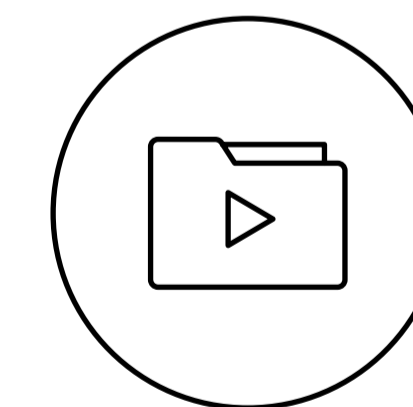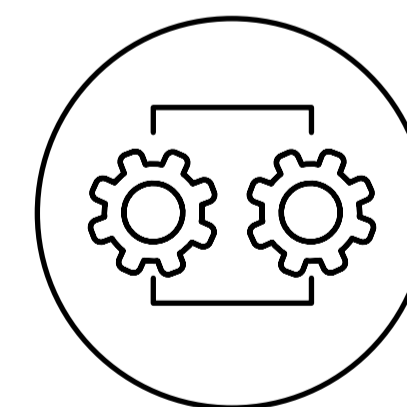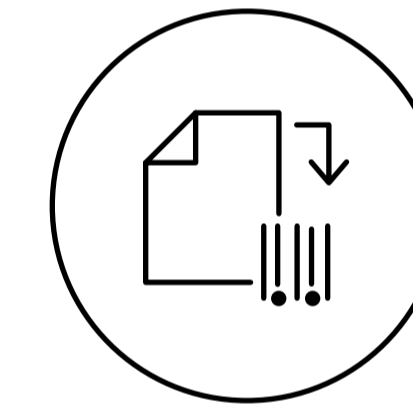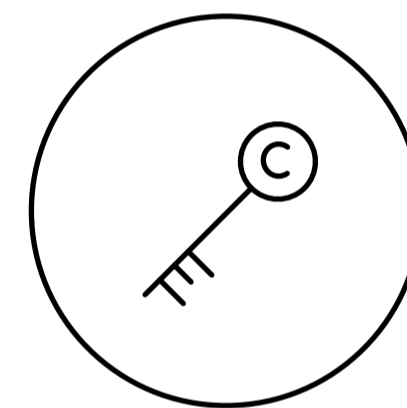
BLOCKCHAIN TECHNOLOGY[24]
Blockchain is a decentralised digital ledger that allows content providers to verify and record transactions over an encrypted, secure platform. Its transparency prevents pirates from passing off stolen content as their own, its architecture also creates a safe ecosystem directly connecting content providers with consumers. Every transaction is sealed with a permanent receipt ready for retrieval at any time.

24. Hackernoon: Blockchain meets the Film Industry: beginning of a new Avatar

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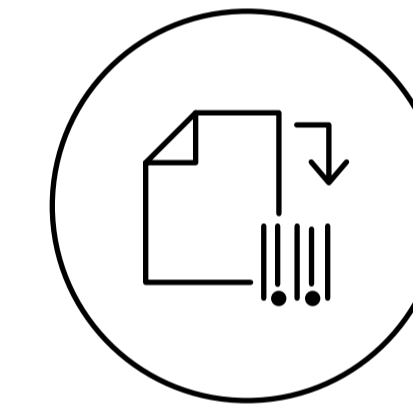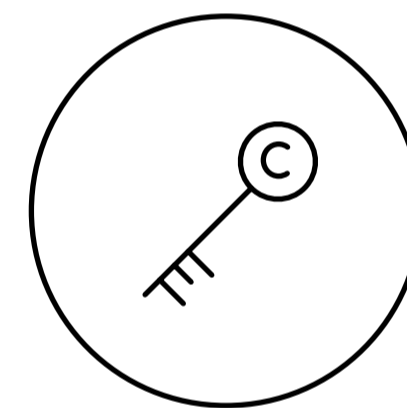TO CRACK DOWN PIRACY
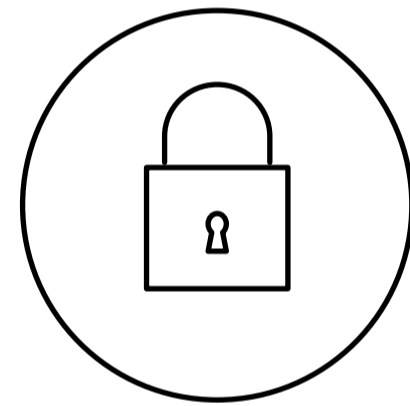
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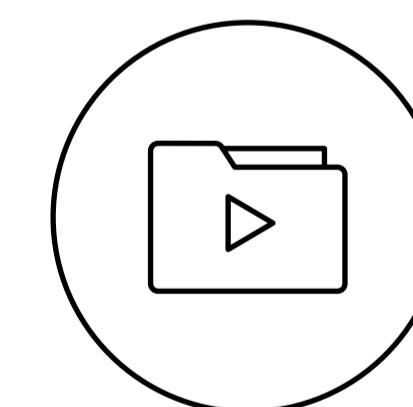Combatting Piracy
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Explore the different anti-piracy technologies below.

MACHINE LEARNING (ML)[25]
ML is particularly useful for deterring live sport event piracy. This AI-based tool was originally designed to retrieve illegal streams through identifying broadcaster logos. Content pirates reacted by blanking out these logos. As a counter measure, machines are programmed to distinguish illegal videos through other methods, including face recognition.

25. Analytics Vidhya: Irdeto is Using Machine Learning in the Fight Against Piracy

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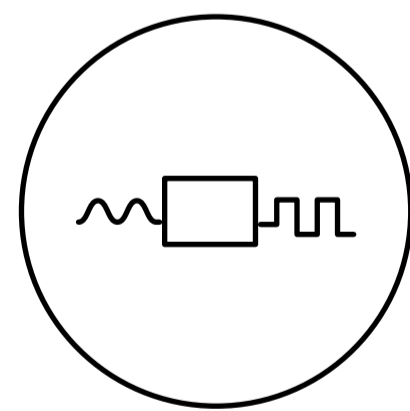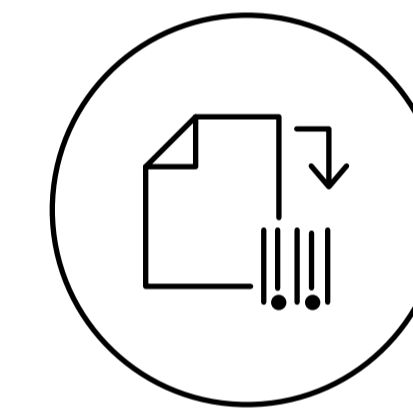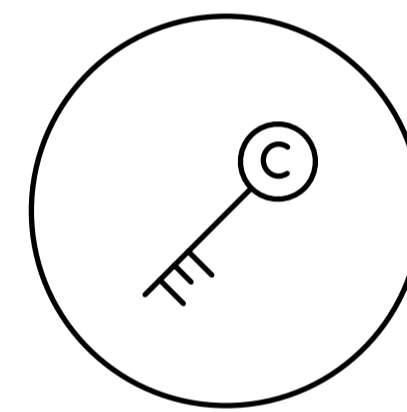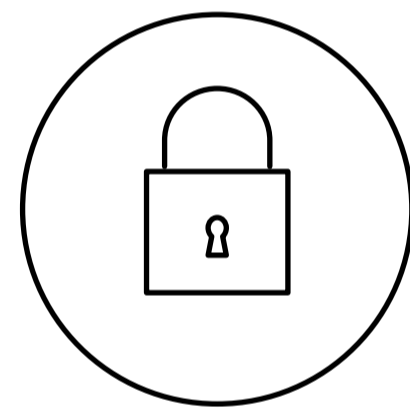
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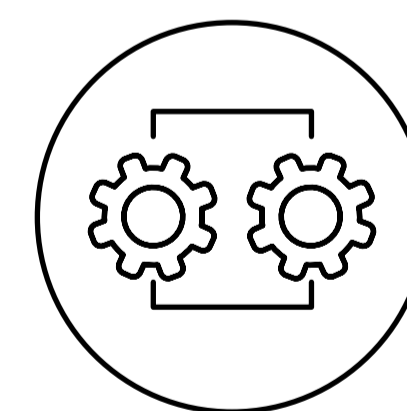
VIDEO VIRTUALISATION[26]
This technology exposes data within the video, allowing content to be manipulated and personalised. Content providers can then insert protection barriers within the video, making it impossible for content pirates to splice or change the content, and therefore impossible to sell. Video virtualisation fully locks the content, allowing only the original content provider with the key to open it.

26. Entrepreneur Asia Pacific | Technology: What the Future of Video Tech Looks Like

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Asia-Pacific consumers have the power to reduce digital piracy should they be made aware of the potential damage that piracy causes the industry, as well as the legal consequences piracy have upon consumers.

Anti-piracy efforts are most effective when both government and industry players collaborate to deter piracy, and this could be more successful with ample push from consumers.

According to the Irdeto Global Consumer Piracy Survey in 2017, 78% of Asia-Pacific respondents knew it was illegal to reproduce legal content or share pirated content. However, the majority were not as aware that downloading and streaming of pirated content is also illegal[5]. While 55% of them indicated their willingness to watch less or stop pirating content if they were made aware of the repercussions to the content creation industry[5]. It also exposes themselves to malicious ads that could potentially infect devices used—around half of the ads hosted on illegal sports streaming sites are malicious[27]. In fact, 40% of ads found on pirate sites were classified as "high risk", while 36% of those feature malware aimed at stealing consumer's personal information and compromising their personal security in cyberspace[28].

Through anti-piracy education, consumers will learn that any form of piracy is illegal. This signifies that more anti-piracy education in Asia-Pacific will have a significant impact in reducing piracy consumption.

27. The Star Online, Malaysia: Piracy is theft
28. Digital News Asia: 'Pirate' TV boxes usurp the place of pay TV subscription

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Consumers are showing an increasing preference for affordable high-quality online video content. However, their demands are often not met which led to the growth of digital content piracy. It is imperative for broadcasters, pay-TV operators, content providers and distributors to innovate and enhance their services to retain and attract new subscribers. As a safeguard against piracy, it is key to partner with a trusted satellite provider that is equipped with sophisticated encryption techniques and an active interest in engagement with anti-piracy efforts.

At SES, we are committed in the global fight against content theft and is an active member of Coalition Against Piracy (CAP).

SES is the world's leading satellite operator serving more than 41 DTH platforms globally. Our satellites serve over 8,200 channels to more than one billion people across 355 million TV homes. With access to our unparalleled reach and reliability, and our portfolio of end-to-end managed services, you can grow your audience and deliver superior multi-screen and multi-device viewing experiences—whether on linear channels, video-on-demand (VOD) and streaming platforms, or social media sites.

Talk to us about how you can leverage our technical reach and end-to-end video solutions to grow your audience and deliver superior viewing experiences—on any platform, and any device.

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