

Anti-piracy activities carried out by the Motion Picture Association (MPA)

MPAの海賊版対策

第2回海賊版対策官民実務者級連絡会議

令和 7年 1月28日

Motion Picture Association Japan 村上裕之



Motion Picture Association

モーション・ピクチャー・アソシエーション



NETFLIX





Alliance for Creativity and Entertainment

クリエイティビティとエンターテインメントのための同盟



WHAT DO WE KNOW ABOUT

2023 MOVIE & TV PIRACY TRENDS WORLDWIDE



THE PREVALENCE & TYPES OF PIRACY



185.6B visits to movie and TV piracy sites globally in 2023.

18.9B downloads globally of pirated wide release movies, primetime TV and video-on-demand (VOD) shows in 2023 using peer-to-peer protocols alone, not including other sources like streaming and downloading sites.¹

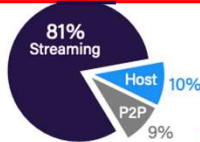


USA

16.2B visits to film and TV piracy sites in 2023.

2.3M average monthly visitors to the 10 most popular streaming piracy sites.

2.9B downloads of pirated wide release movies, primetime TV and VOD shows in 2023 using P2P protocols alone, not including streaming and downloading sites.²



Latin America

40.1M, or 40.8%, of broadband internet households in Latin America consume online piracy.³

Europe

17.1M Europeans use illicit IPTV services, or 4.5% of the EU27 + UK population. This share is even higher - 11.8% - among the population aged 16-24.⁴



France

6.3M users viewed pirated films, series and sports content online in France in 2023 on average, down from 7.2M in 2022.⁵



Germany

5.9M Germans watched illegal live TV streams in 2022, roughly double the number in 2018.⁶



Italy

39% of Italian consumers, or roughly 10 million individuals, watched pirated films, series, and live sports in 2023.⁷



Spain

24% of consumers viewed pirated films and 20% viewed pirated TV series in 2022. 5.3 billion pirated files were accessed in total, including other content.⁹



UK

24% of individuals in the U.K. watched pirated films, 19% watched pirated TV series, and 36% watched pirated live sports in 2022.¹⁰



Australia

23-28% of Australia's recent online movie and TV consumers viewed at least some content online in ways that were likely to be unlawful.¹¹



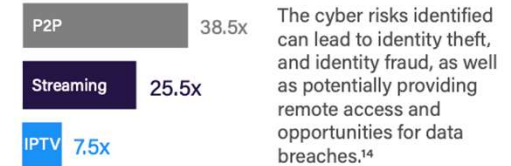
Japan

471M visits per month to 1,090 online piracy sites from July 2021 to July 2022.¹²

PIRACY SITES: CONSUMER RISKS

^{194M for Movie & TV Piracy}

Consumers face 38.5 times greater risks of cyber threats when visiting P2P piracy sites, 25.5x greater risks on streaming piracy sites, and 7.5x greater risks on IPTV piracy sites than when visiting mainstream websites.¹³



According to a study by Carnegie Mellon researchers:

2x time spent on piracy sites = **20%** more malware infections.¹⁵

Roughly **1** in **3** piracy websites and apps have risky advertising that exposes consumers to fraud and malware.¹⁶

57% more likely to infect your device with malware embedded in the app when downloading an illegal IPTV app.¹⁷

A survey of U.S. Internet users found that those who used a credit card to sign-up for an online piracy subscription were 4x as likely to report credit card fraud.¹⁸





WHAT DO WE KNOW ABOUT

2023 MOVIE & TV PIRACY TRENDS WORLDWIDE



ECONOMIC HARM FROM PIRACY

14-15% is the estimated increase in U.S./Canada box office if piracy could be eliminated from the theatrical window (generally equivalent to \$1 billion per year). The promotional effect of piracy is far outweighed by the cannibalization effect.¹⁹

+15%

Box Office

19% decrease in box office revenue due to pre-release piracy, as compared to what would have occurred if piracy were only available after the movie's release.²⁰

Nearly all academic studies on video piracy find evidence that piracy displaces theatrical and home entertainment sales. Estimates for home video losses are, on average, larger than those for the box office, with the exception of one study that suggests that pre-release piracy may be particularly devastating to theatrical revenue.²¹

\$29.2B is the estimated lost revenue to the U.S. economy each year due to global online piracy, according to a NERA study.²²

PIRACY PROFITS

\$1.34B in estimated annual advertising revenues on piracy websites and illicit streaming apps.²³

- **\$18.3M** average annual revenue on the top five piracy websites.
- **\$27.6M** average annual ad revenue on the top five piracy apps.

12% of the total ads on piracy sites are malicious advertising (malvertising), generating a minimum of \$121 million annually in revenue, with more than half of that, \$68.3 million, coming from U.S. visits.

- Malvertising accounts for roughly \$1 out of every \$4 in illicit advertising revenue.²⁴

\$1B revenue for pirate subscription IPTV annually in the U.S. alone, with an estimated 9 million subscribers.²⁵

56% estimated profit margins for pirate subscription IPTV service retailers and 85% for wholesalers.²⁶

IMPACT OF PIRACY SITE SHUTDOWNS

66% decrease in piracy site/app visits and 12% increase in legal content site visits by former users of popular sports piracy sites futbolibre.net and televisionlibre.net after the November 2022 ACE shutdown.²⁷

10% increase in legal content site visits and 38% decrease in piracy site/app visits by former users of 11 popular Spanish infringing sites and associated domains shut down by ACE in late November 2020 through January 2021. This resulted in roughly 20,000 new SVOD users.²⁸

32,000 new SVOD users estimated in Argentina, Chile, Colombia, and Mexico, based on an analysis of the shutdown of piracy websites Pelispedia.tv, Pelispedia.org and Pelisplus.tv in May 2019.²⁹

Methodology for Analysis of Site Visits

This custom analysis uses Similarweb data to report across a group of sites often used for online piracy by category. It measures access to sites, but does not indicate what type of content was accessed (e.g., movies, TV, games, software, etc.).

Similarweb data used in this report represents visits to websites by the United States and Global desktop and mobile users from January 2023 - December 2023. Similarweb is a market intelligence company that uses a combination of panel, crawler, ISP and other data for its data estimations. See: <https://www.similarweb.com/ourdata> and <https://support.similarweb.com/hc/en-us/articles/360001631538-Similarweb-Data-Methodology> for more information.

For the purpose of this analysis, sites used for online piracy included:

- Sites with over 10,000 copyright removal requests according to the Google Transparency Report. (<http://www.google.com/transparencyreport/>) as of December 2023.
 - Including sites with any TV and/or movie content.
 - Excluding sites with only adult, music, games, UGC and eBook content.
- Sites blocked in various countries or shut down, which have TV and/or movie content, and
- Sites from <http://www.operationcreative.uk>, <https://piracybank.org/> and other internal and external sources.

In the United States 43,987 sites were included, based on Similarweb data. MPA placed the sites into custom analysis categories including streaming sites (36,722), P2P sites (5,413) and cyberlocker/host sites (1,852). Host sites include illegal cyberlockers or similar sites. Worldwide, 117,905 sites were included, based on Similarweb data. MPA placed the sites into custom analysis categories including streaming sites (99,079), P2P sites (14,787) and cyberlocker/host sites (4,039). Host sites include illegal cyberlockers or similar sites.

Sources

¹ OpSec Security GDPI.

² OpSec Security GDPI.

³ Alianza, Pay Television Network & Online Piracy, 2023.

⁴ Audiovisual Anti-Piracy Alliance, "Illicit IPTV in Europe," Economic Report, December 2022.

⁵ Mediametrie, ALPA, CNC, "The Pirate Audience for Illegal Websites dedicated to video content in France," 2023.

⁶ Vaunet, Goldmedia, "Television Piracy Study 2022/2023," January 2023.

⁷ FAPAV/IPSOS, Audiovisual Piracy in Italy, 2023, June 2024.

⁸ Mediavision, "Mediavision: 5 million pirates in the Nordics," Q1 2024.

⁹ GfK, "Observatorio de la piratería 2022," September 2023.

¹⁰ UK Intellectual Property Office, "Online copyright infringement tracker survey (12th Wave)," February 2023.

¹¹ Australian Attorney-General's Department, "Annual consumer surveys on online copyright infringement," 2023 (May 2024).

¹² Phonic System Solutions Inc. (PSS), Study Update: Benchmarking and Tracking Online Film & TV Piracy in Japan, July 2019 to July 2022, October 2022.

¹³ Watters, Consumer Risk from Piracy in Poland.

¹⁴ Watters, The Piracy-Malware Nexus in India.

¹⁵ Telang, Does Online Piracy Make Computers Insecure? Evidence from Panel Data, March 2018.

¹⁶ Digital Citizens Alliance, Breaking Bads: How Advertiser-Supported Piracy Helps Fuel A Booming Multi-Billion Dollar Illegal Market, August 2021.

¹⁷ Audiovisual Anti-Piracy Alliance, Audiovisual Piracy Cyber Risk for European Consumers, September 2022.

¹⁸ Digital Citizens Alliance, Giving Piracy Operators Credit, June 2023.

¹⁹ Montgomery, Ma, Smith, The Dual Impact of Movie Piracy on Box-office Revenue: Cannibalization and Promotion, February 2016.

²⁰ Montgomery, Ma, Smith, An Empirical Analysis of the Impact of Pre-Release Movie Piracy on Box Office Revenue, July 2014.

²¹ Danaher, et al, Piracy Landscape Study: Analysis of Existing and Emerging Research Relevant to Intellectual Property Rights (IPR) Enforcement of Commercial-Scale Piracy, March 2020.

²² NERA/GIPC, Impacts of Digital Video Piracy on the U.S. Economy, June 2019.

²³ Digital Citizens Alliance, Breaking Bads: How Advertiser-Supported Piracy Helps Fuel A Booming Multi-Billion Dollar Illegal Market, August 2021.

²⁴ Digital Citizens Alliance, Unholy Triangle, From Piracy to Ads to Ransomware: How Illicit Actors Use Digital Ads on Piracy Sites to Profit by Harming Internet Users, September 2022.

²⁵ Digital Citizens Alliance/NAGRA Kudelski, Money for Nothing: The Billion-Dollar Pirate Subscription IPTV Business, August.

²⁶ Digital Citizens Alliance/Nagra, Money for Nothing: The Billion-Dollar Pirate Subscription IPTV Business.

²⁷ ACE, The Impact of the Futbolibre Shutdown in Argentina, July 2024.

²⁸ ACE, The Impact of Piracy Site Shutdowns in Spain, June 2024.

²⁹ ACE, The Impact of the Shutdown of Pelispedia, 2022.



日本におけるインターネット上の海賊版サイトの定量化と分析（2023年）

月間訪問数10万回を超える海賊版サイトは1,290サイト存在し、1年間の平均月間訪問数は約1.94億ある

1. 月間訪問数10万回を超えた海賊版サイトは、昨年842サイトから今年は1,290サイトに増加した。
注) 今回は漫画は除いて定量化を行った。

表1 海賊版サイトタイプの定義

サイトタイプ	定義
P2Pサイト(P2P)	ピア・トゥー・ピア方式を使って海賊版コンテンツをダウンロードするためのトレントファイルを提供するサイト
ストリーミングサイト(Streaming)	海賊版の動画コンテンツをサイト内で再生する機能を持つサイトで、コンテンツファイルは他のサイトに存在することが多い
リーチサイト(Leech)	自サイト内にコンテンツファイルを持たず、他の海賊版サイトに誘導したり、他のサイトのファイルをダウンロードさせるサイト
ストレージサイト(Host)	ファイルをオンライン上に保存することができるサイトで、リーチサイトやストリーミングサイトの海賊版コンテンツを保存する場所として利用される

表2 コンテンツタイプの定義

コンテンツタイプ	定義
映画 (Film)	洋画、邦画など映画館で上映された作品。アニメーション映画も含む。
TV番組 (TV)	ドラマ、バラエティーなどのTV番組。映画とアニメは含まない。海外のドラマやバラエティーも含む
アニメ (Anime)	TVアニメ番組、Webサービスのアニメ等、映画アニメは映画に分類。

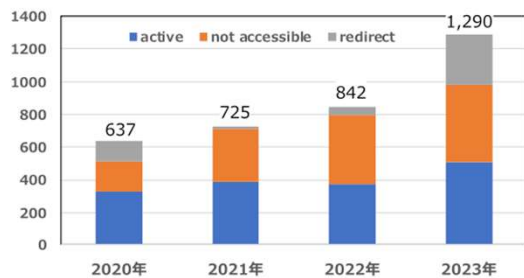
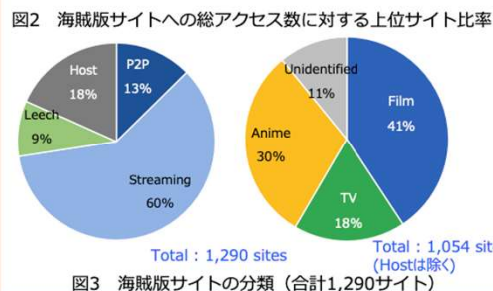
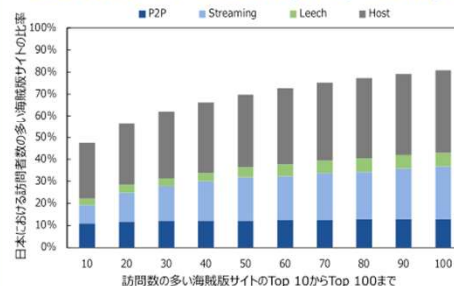


図1 海賊版サイト数の推移

活動中の海賊版サイトも多いが、直ぐに閉鎖したり他のサイトへ移行するサイトも多い。

2. 海賊版サイトへの訪問数

上位10サイトで約54%(昨年)→48%(今年)
上位100サイトで約86%(昨年)→81%(今年)



3. 前回調査に引き続き、2023年7月までの調査を実施した結果

- 海賊版サイト月間総訪問数は、
2019年7月～2020年6月：平均1.90億
2020年7月～2021年6月：平均1.96億
2021年7月～2022年6月：平均2.12億
2022年7月～2023年7月：平均1.94億と多い。
- 日本からのアクセス数が10万以上のサイトに絞ったにもかかわらず、海賊版サイト（映画、テレビ、アニメ）は842サイトから増加し、1,290サイトとなった。
- ストリーミングサイトが全体の6割を占める。その他はホスト、P2P、リーチの順。コンテンツの種類別では、今年は「映画」が最も多く、次いで「アニメ」、「テレビ番組」の順であった。
- 2023年3月末、大規模なストリーミングの海賊版サイトが閉鎖されたため、2023年4月はストリーミングが激減した。

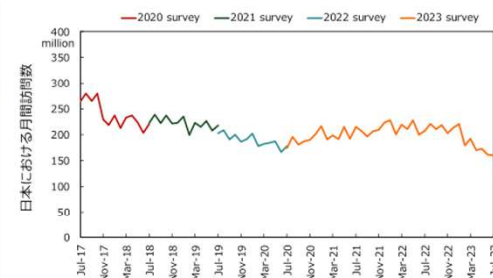


図4 2020年から2022年の調査結果を加えた総訪問数の推移 (2017年7月～2023年7月)

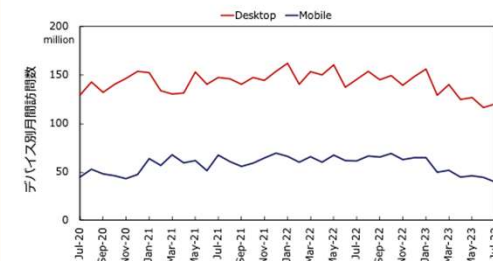


図5 デバイス別の海賊版サイトへの総訪問数の推移

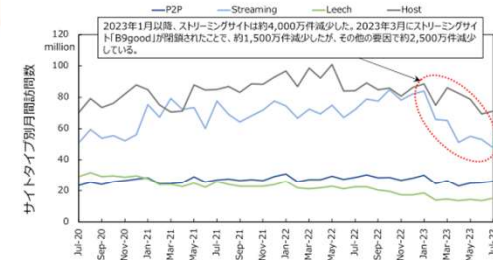


図6 サイト種類別の海賊版サイトへの月間訪問数の推移

注) この分析のデータは2023年8月の時点でのSimilarwebを利用して取得したものである

海賊版対策のツールボックス2024

サイト・ブロッキング

民事訴訟

犯罪者の照会

ドメイン・シージャ

ドメイン・サスペンション

侵害行為の停止・中止通告

検索エンジン対策

媒介者との協力

ノーティス・アンド・テイクダウン

広告出稿抑止

情報に関する権利

KYBC

DMCA召喚状（サピーナ）





ベトナムでの活動（FMOVIES閉鎖）

Fmovies

- 2016年に活動開始
- 世界最大規模の映画・TV海賊版サイト
- 2023年には、テレビ・映画・ストリーミングのカテゴリの中で、日本で最もアクセスされたウェブサイトの一つ。
- 運営者はbflixz、flixtorz、movies7、aniwaveなど60以上の海賊版ドメインを運営

閉鎖：2024年7月



OCTOBER 29, 2024

ACE AND EGYPTIAN AUTHORITIES SHUT DOWN MAJOR LIVE SPORTS PIRACY RING

LOS ANGELES – Egyptian authorities collaborated with the Alliance for Creativity and Entertainment (ACE), the world's leading antipiracy coalition, to shut...

READ MORE >>

<https://www.alliance4creativity.com/news/vietnamese-authorities-with-support-from-ace-take-down-worlds-largest-piracy-ring/>



ベトナムでの活動（FMOVIES閉鎖）

Fmoviesの閉鎖は官民パートナーシップの成功例

U.S. Government

- Homeland Security Investigations (HIS)
- U.S. Department of Justice International Computer Hacking and Intellectual Property (ICHIP)
- National IPR Center
- U.S. Embassy in Vietnam

MPA's efforts

- Charles Rivkin, Chairman and CEO met with Vietnam Ambassador
- MPA General Counsel met the chief of the Ministry for Public Security in Vietnam

Vietnam Government

- Ministry of Public Security
- Hanoi Municipal Police

Vietnam Civil Partnership

- Vietnam Film Development Association (VFDA)



2024年6月 MPA会長と在米ベトナム大使との会談

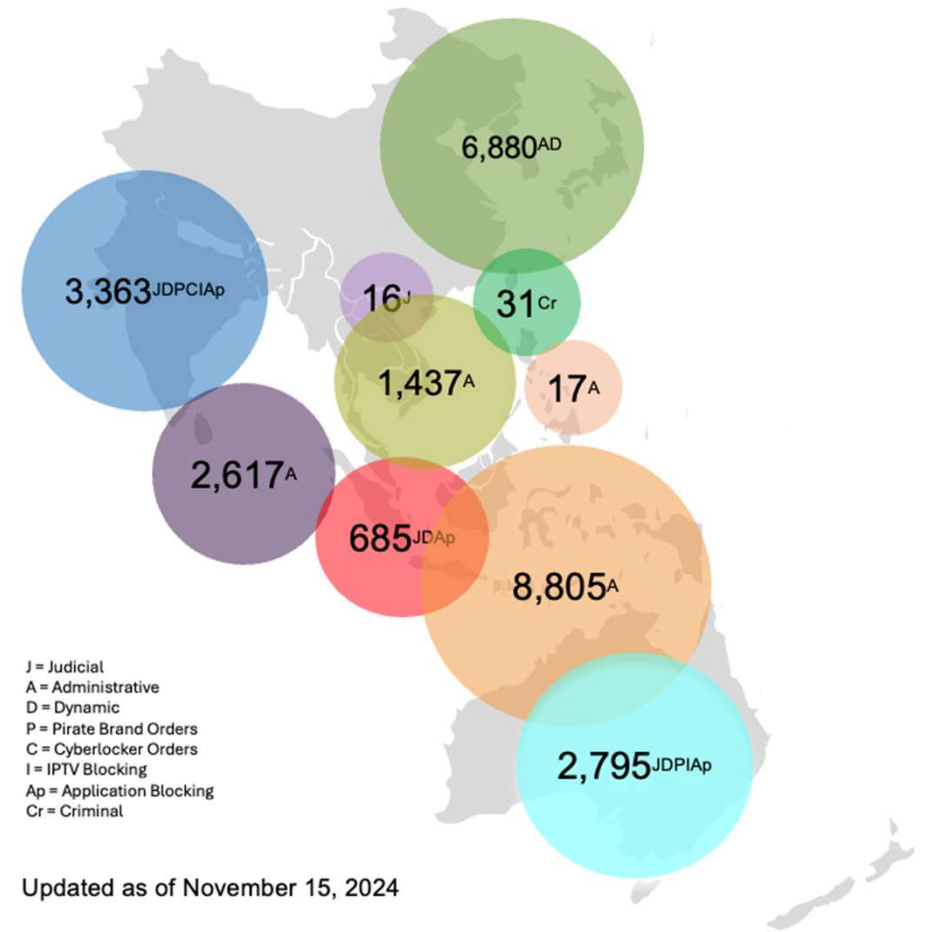
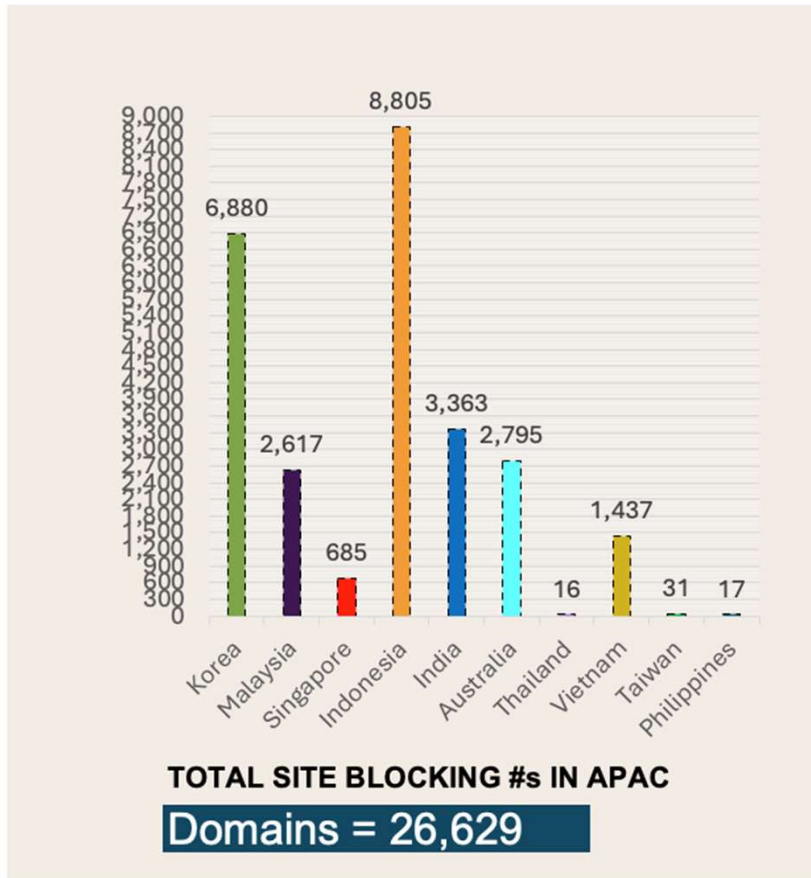


インターネットインフラ・サービス事業者との協力

“Infrastructure-as-a-Service” (IaaS)

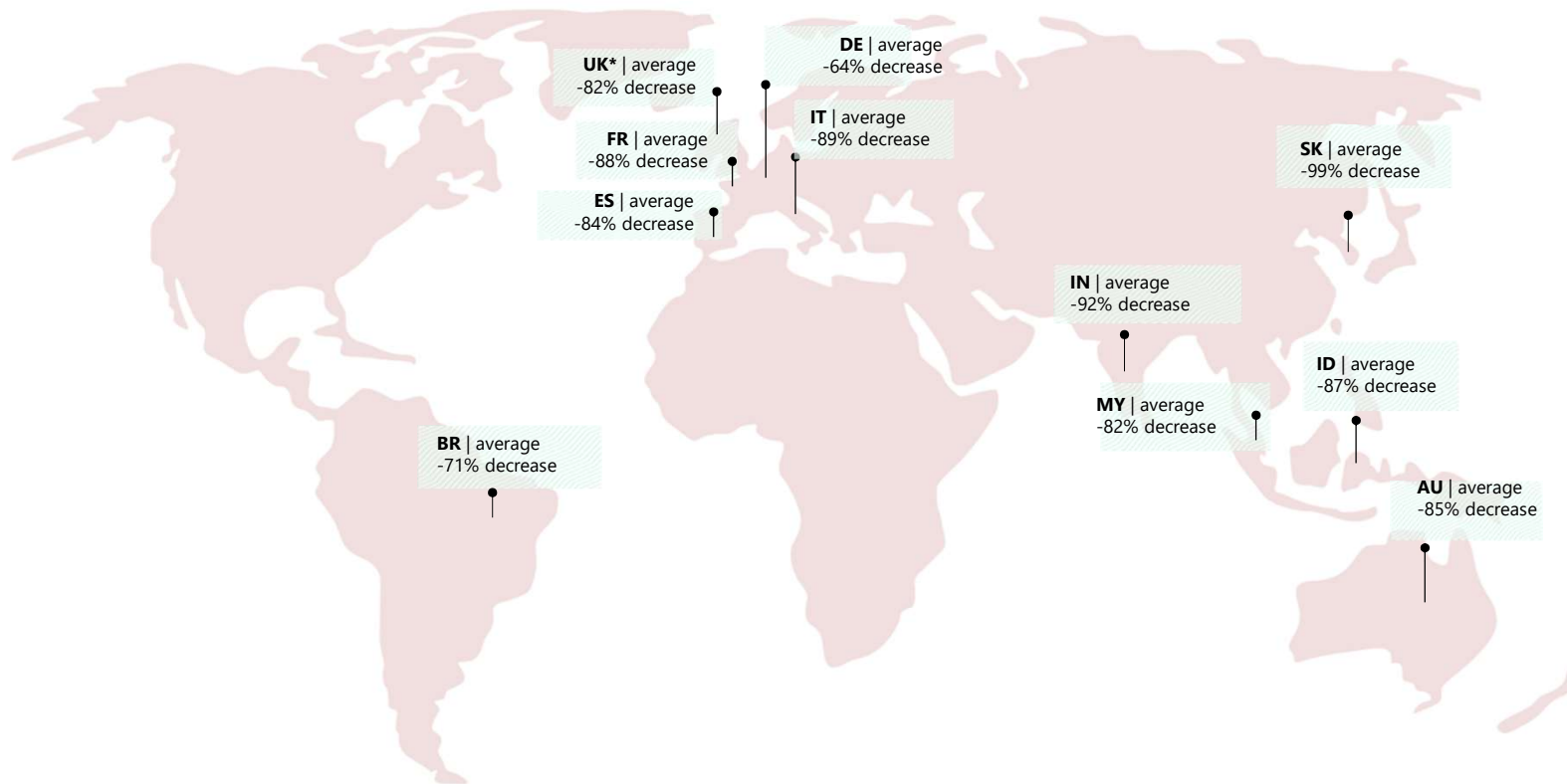
- web hosting (e.g., GoDaddy, Google);
 - reverse proxies (e.g., Cloudflare, Zscaler);
 - content delivery networks (“CDNs”) (e.g., Cloudflare, Fastly, Akamai);
 - domain name registration (e.g., GoDaddy, Namecheap, Cloudflare);
 - Domain Name System (“DNS”) (e.g., Cloudflare, GoDaddy);
 - online advertising services (e.g., Google, Meta, Yahoo!); and
 - payment processors (e.g., Stripe, PayPal, Square).
-
- CF operates many of IaaS and are an important part of the Internet ecosystem
 - CF’s services are used by many pirate sites to hide their own identities.
 - A cooperative relationship with CF is essential for MPA’s copyright protection activities.

アジア・太平洋地域におけるサイト・ブロッキング2024





2023年のブロッキング対象サイトのアクセス数減少率





Piracy website blocking increases legal video consumption



Causal Impact of SB on Migration from Piracy to Legal Services



5% of heavy pirate users migrated to legal services in a single SB wave in Australia ^{*1}



6% increase in visits to paid legal streaming sites, and

10% increase in videos viewed on legal ad-supported streaming sites, in a single large SB wave in the ^{*2} UK



8.1% website blocking in India in 2019 caused an 8.1% increase in legal consumption ^{*3}

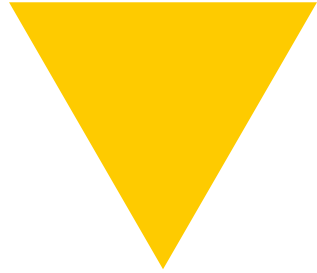


5.2% increase in legal consumption observed in website blocking in 2021 ^{*3}

^{*1} Motion Picture Association, Measuring the Effect of Piracy Website Blocking in Australia on Consumer Behavior: 2018-2019 (2021)

^{*2} Brett Danaher et al, Website Blocking Revisited: The Effect of the UK November 2014 Blocks (2016)

^{*3} Danaher et al., The Impact of Online Piracy Website Blocking on Legal Media Consumption, Social Science Research Network (SSRN) (2024), at https://papers.ssrn.com/sol3/papers.cfm?abstract_id=4723522



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Thank you



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