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PIRACY UNCOVERED: UNDERSTANDING CONSUMER PERCEPTION AND CONSUMPTION OF PIRATED CONTENT IN MALAYSIA AND VIETNAM

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ABSTRACT

This report presents key findings from a consumer research survey examining attitudes and behaviors toward online content piracy in Malaysia and Viet Nam. The survey was conducted in January and February 2026, with 2,000 nationally representative respondents per country aged 18 to 65. The study found that access to pirated content is widespread in both Malaysia and Viet Nam across each of the surveyed content categories. Behaviors are entrenched, especially in Viet Nam, where the incidence of piracy is higher per category. Results also indicate that highlighting the potential negative impacts of piracy on an individual and obtaining better understanding of what consumers expect of official channels could lead to deterrents to encourage respondents to switch from pirate sources to official sources.

¹ The study was conducted with funds provided by the Government of Japan.

² The views expressed in this document are those of the author and not necessarily those of the Secretariat or of the Member States of WIPO.

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EXECUTIVE SUMMARY

1. This document outlines the key findings from a research survey into consumer behaviors and attitudes toward online content piracy in Malaysia and Viet Nam. Survey fieldwork took place in January and February 2026, with a nationally representative sample of 2,000 respondents per country aged 18 to 65 in Malaysia and Viet Nam. In general, the overwhelming majority of adults aged 18 to 65 in Malaysia and Viet Nam are consumers of pirated content (93% and 94% respectively). This behavior was examined within the five content categories of TV, movies, music, publications and software. In Viet Nam, a higher proportion of consumers are likely to consume pirated content in all five categories (34%) compared to Malaysia (19%).
2. Despite the high incidence of piracy in each market, there is a strong overlap in the use of both pirated and official sources: across the content categories, almost all consumers of pirated works also consume content from the same category through an official source (ranging from 94% in Malaysia for publications, to 100% in Viet Nam for TV and movies). Further, the most used official sources are the same across the two markets.
3. Nonetheless, piracy still makes up a high proportion of annual consumption of content. In Malaysia, the proportion of piracy ranges from 42% of annual consumption of music to 33% of annual consumption of movies. The proportion is similar (but on a higher level) in Viet Nam, with piracy ranging from 49% of annual consumption of music to 39% of annual consumption of movies.
4. Both consumers and non-consumers of pirated content cite the danger of personal risk as an influential deterrent in using pirate sources. These dangers include personal security (e.g. being subject to identity theft, or having devices compromised by viruses, malware or ransomware) as well as the risk of prosecution. For content categories such as music, a belief that using pirate sources harms creators also seems to be an important deterrent.
5. Consumers of pirated content in both countries also report that key factors that would encourage them to switch from accessing pirate sources to using official sources relate to the experience of using official channels, such as wanting a broader content offering, greater convenience and lower price. In Malaysia specifically, consumers also mentioned content not being available in their local region.
6. Most consumers of pirated works also claim that if they were not able to access pirate sources, they would switch to an official channel rather than stop consumption of that content – at least 7 in 10 across the categories in each country.
7. The results summarized above reveal opportunities to expand the use of official channels within these two markets.

I. INTRODUCTION

8. WIPO commissioned Ipsos to carry out quantitative research to inform understanding of online content piracy in Malaysia and Viet Nam. Here, “content” refers to five categories: TV, movies, music, publications and software (including gaming). The study also sought to identify the motivational drivers that incentivize consumers to acquire pirate copyrighted works, and in turn what would deter them from this behavior.

9. Ipsos conducted a 20-minute online survey of a representative sample of 4,000 participants aged 18-65 in Viet Nam and Malaysia (n=2,000 per market). Fieldwork took place between January 22 and February 11, 2026.

10. Within each market, quotas were set on age within gender, region and working status, so as to be nationally representative of the general population. All data were then weighted for national representation in terms of age within gender, region and working status. For further details see Appendices II.1 and II.2.

11. The following key definitions are used throughout this report:

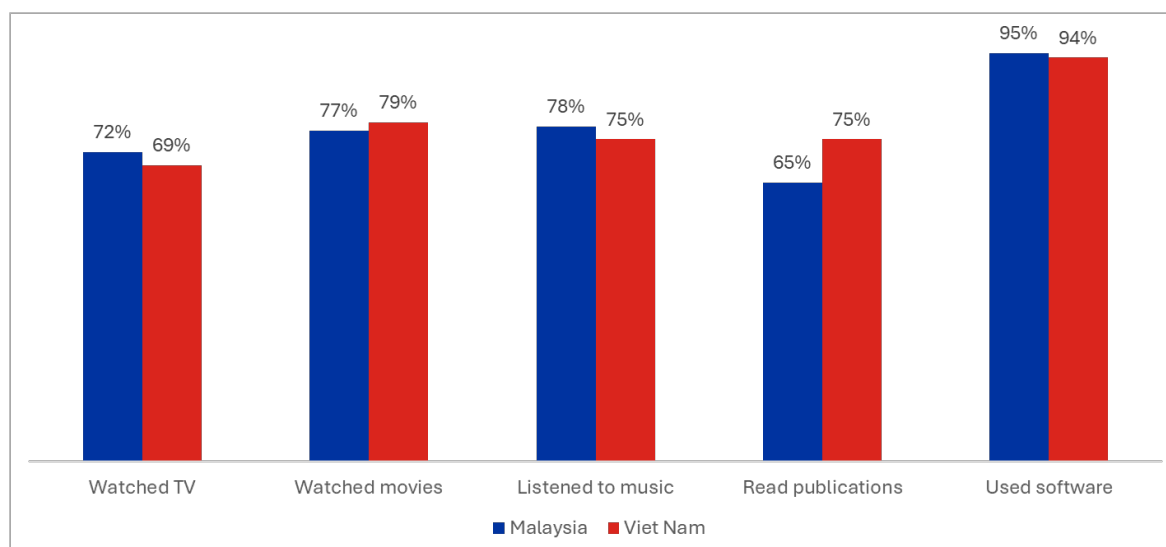
- **Official sources:** Sources which provide content, including websites and apps, that have permission from the copyright owner to provide that content. Examples vary across the content categories but include sources through which the individual (i) watches TV/movies via any **official website/app**, such as a TV channel's website/app, an official paid subscription website/app (e.g. Netflix), a paid rental website/app or other official website or app (e.g. iQIYI); (ii) listens to music via an **official music streaming app or website**, where music is uploaded by the artist or with the artist's permission; or (iii) rents publications from a **library app**.
- **Pirate sources:** Sources which provide content, including websites and apps, without the copyright owner's permission. Examples vary across the content categories but include sources through which the individual (i) downloads content from an **unofficial website/app** to one of their devices or (ii) **stream-rips** content, i.e. converts streamable video/audio content (e.g. a YouTube video) into a downloadable music file or uses a tool (e.g. website, app) that **removes paywalls on websites**.
- **Consumer of pirated works/content:** A respondent who has used an unofficial source to access copyrighted content in the past 12 months for at least one of the five content categories. Note: A consumer of pirated works/content may additionally consume authorized content alongside pirated content (further explained below).
- **Non-consumer of pirated works/content:** A respondent who has **not** used any unofficial source to access copyrighted content in the past 12 months for at least one of the five content categories.

II. LANDSCAPE

What is the engagement with content categories in Malaysia and Viet Nam?

12. Adults aged 18-65 in Malaysia and Viet Nam demonstrate significant engagement with digital technology, as indicated by the average ownership of at least four devices (4.6 in Malaysia and 4.5 in Viet Nam). This high level of device ownership, including smartphones (88%), laptops/desktops (67%) and smart TVs (55%), combined with daily internet access (95% in Malaysia and 94% in Viet Nam), creates an environment ripe for media and tech consumption. Engagement with the content categories is high across the two markets (from both official and pirate sources), with at least 2 in 3 respondents having consumed any content category in the previous 12 months.

Figure 1. The proportion of adults aged 18-65 who have engaged with the following categories in the past 12 months, Malaysia and Viet Nam.



13. The popularity of official subscription services for TV/movies (88% in Viet Nam and 85% for Malaysia), music streaming (89% in Viet Nam and 82% for Malaysia) and publications (including news and e-books) (68% in Viet Nam and 60% for Malaysia) indicates a demand for easily accessible, popular content. Despite said popularity, piracy remains high in both markets across the five content categories of TV, movies, music, publications and software.

Understanding incidence: How common is the use of pirate sources to access the content categories?

14. In Malaysia, 93% of the adult population aged 18-65 consume pirated works. Movies have the highest incidence of piracy (65%), closely followed by TV (65%), music (63%), software (46%), and publications (46%). However, consumers of pirated content are almost all accessing through official channels too – for example, 98% of consumers of pirated music also access music through official sources, and this proportion is higher for other categories (see Figure 3).

15. In Viet Nam, the overall level of piracy is similar – 94% of the adult population aged 18-65 are consumers of pirated content. However, the level of pirate consumption in each category is higher than in Malaysia: 72% for movies, 67% for music, 65% for TV, 65% for software, and 61% for publications. This higher incidence of pirate consumption for each content category can be explained by the fact that piracy behavior in Viet Nam is typically multi-category – only 11% access pirated content in just a single category, whereas three times as many adults (34%) use pirated content across all five categories, underscoring an entrenched piracy culture. In comparison, only 19% of adults in Malaysia use pirated content in all five categories (see Figure 4). In addition to this, almost all who consume pirated content also consume content through official channels, rather than relying exclusively on pirated content. For example, 96% of consumers of pirated software in Viet Nam also access software through official channels. For the other categories, this proportion is even higher (see Figure 3).

Figure 2. The proportion of adults aged 18-65 who have accessed pirate sources for the following categories in the past 12 months, Malaysia and Viet Nam.

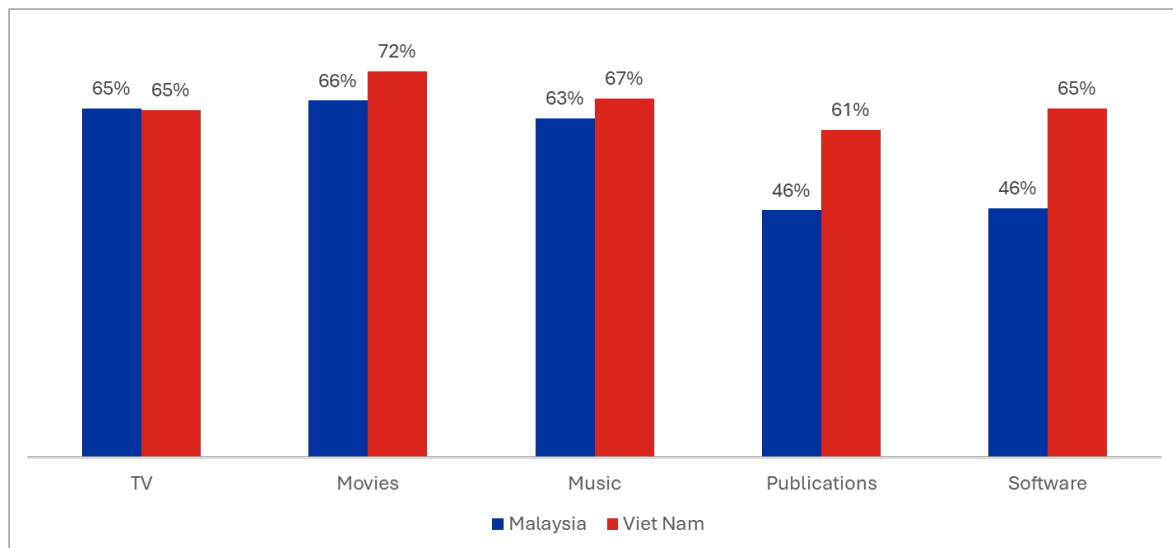


Figure 3. The proportion of consumers of pirated content aged 18-65 from each category who have also accessed official sources for the same category in the past 12 months, Malaysia and Viet Nam.

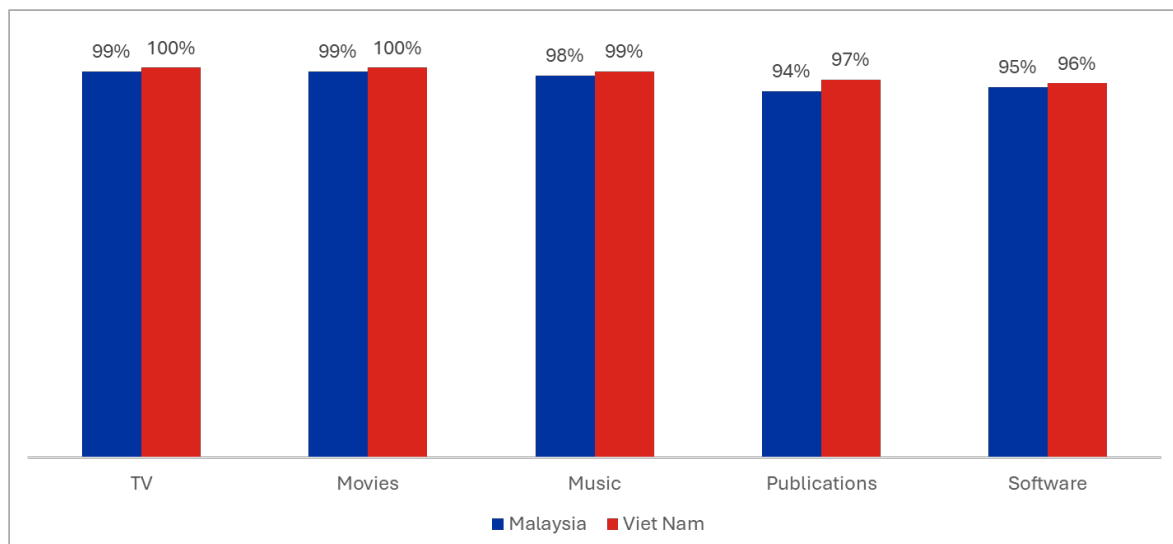
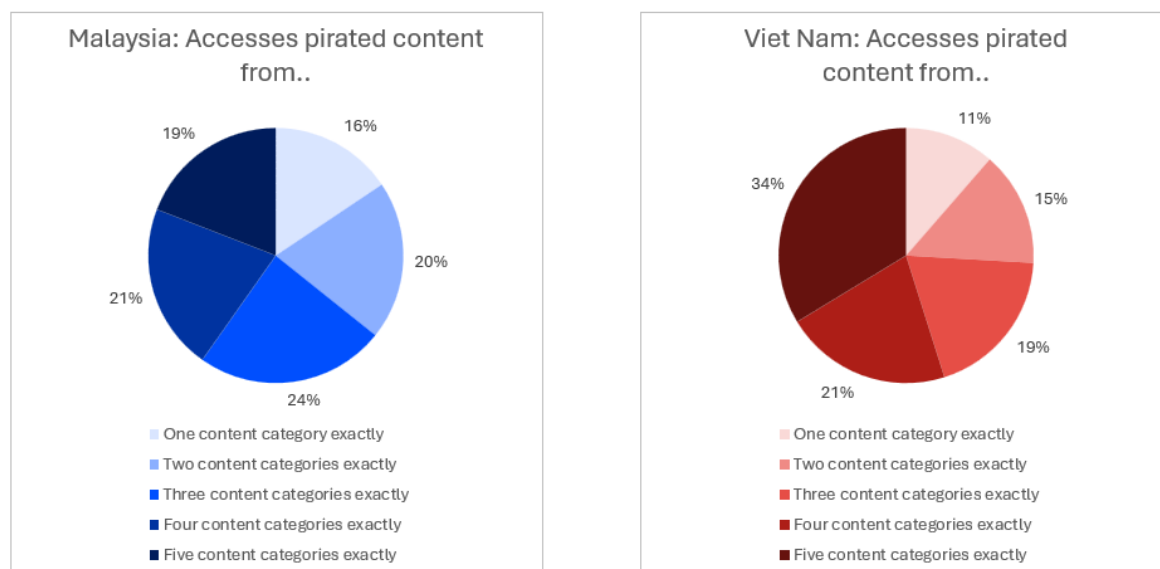


Figure 4. The proportion of consumers of pirated content aged 18-65 and the number of content categories they have accessed pirated content from in the past 12 months, Malaysia and Viet Nam.



16. Media and tech content can be accessed in a wide variety of ways via official and pirate sources, and the most common sources for accessing the five content categories are the same across Malaysia and Viet Nam. In the 12 months previous to the survey, there were high proportions of adults using both official sources and pirate sources, which speaks to the variety of access channels that an individual may use. For each category, while the majority of content is accessed through official sources, pirate sources still make up a high proportion of the way consumers access content.

17. The pirate sources differ somewhat across the five content categories. Three ways of accessing pirated content exist across all categories: downloading from an unofficial website/app to one's device; using a BitTorrent or online peer-to-peer network; or downloading a user-uploaded file from a password-protected locker site. However, many categories have their own unique pirate sources, which can all be found under "List of pirate sources surveyed" in Appendix I.2. The top official and pirate sources used for each category in Malaysia and Viet Nam can be seen in Figures 5-9.

Figure 5. TV Category - The proportion of adults aged 18-65 who have watched TV in the past 12 months and the top sources of official and pirate access they use to watch TV, Malaysia and Viet Nam.

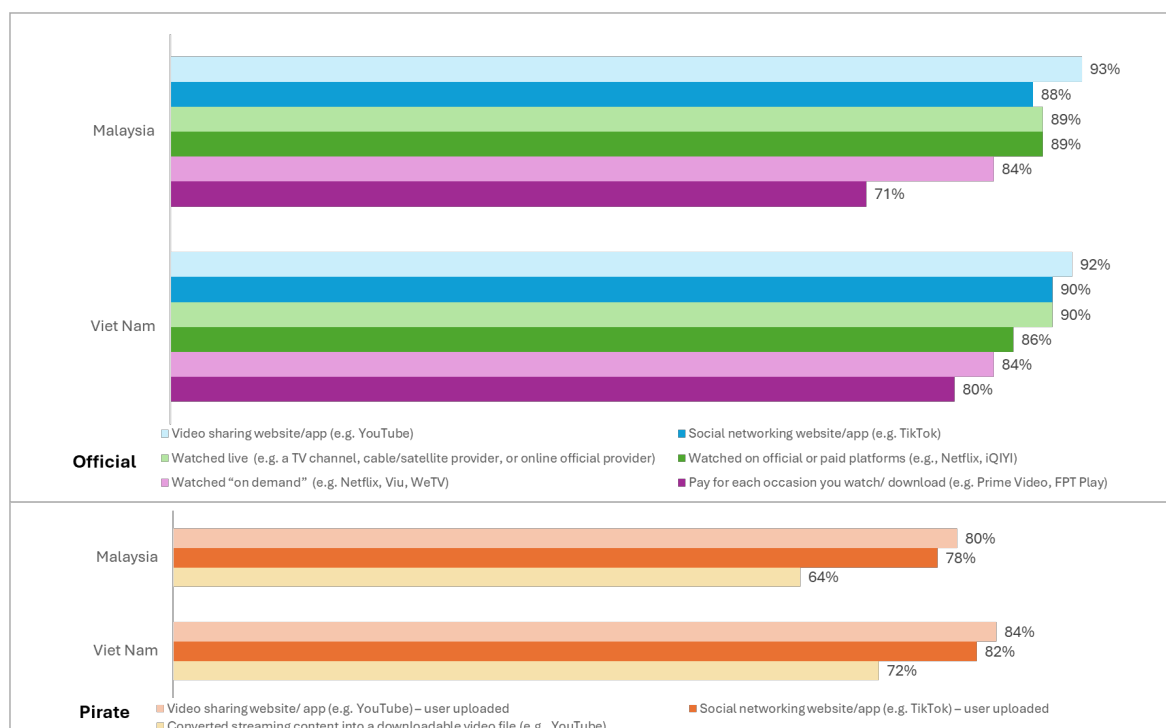


Figure 6. Movies Category - The proportion of adults aged 18-65 who have watched movies in the past 12 months and the top sources of official and pirate access they use to watch movies, Malaysia and Viet Nam.

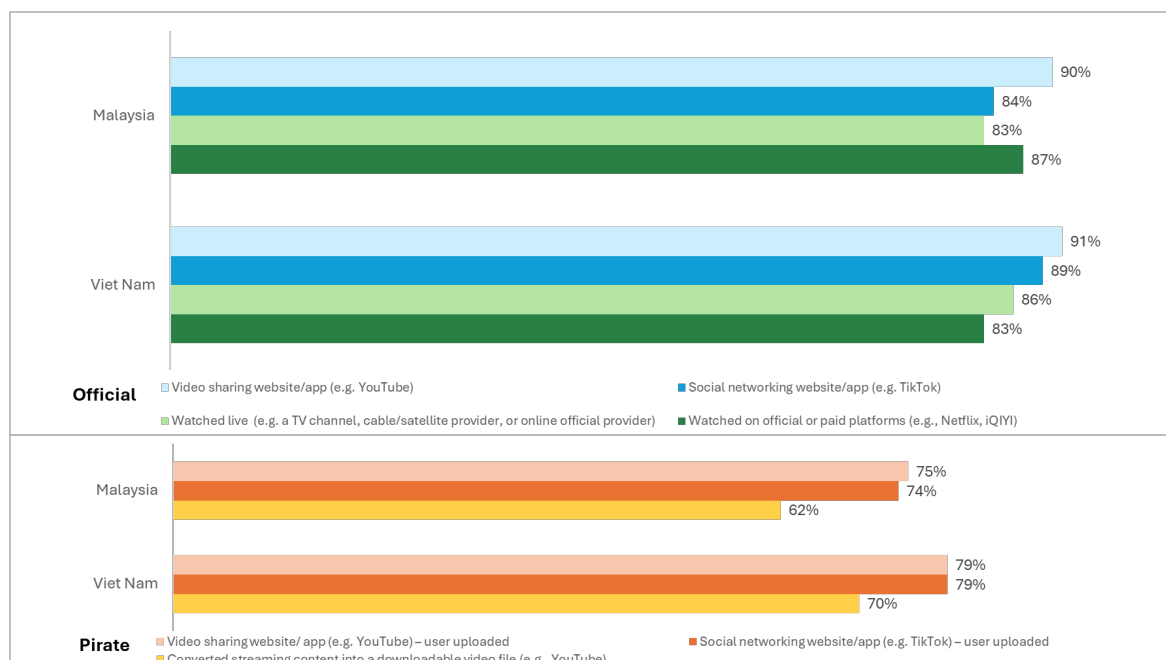


Figure 7. Music Category - The proportion of adults aged 18-65 who have listened to music in the past 12 months and the top sources of official and pirate access they use to listen to music, Malaysia and Viet Nam.

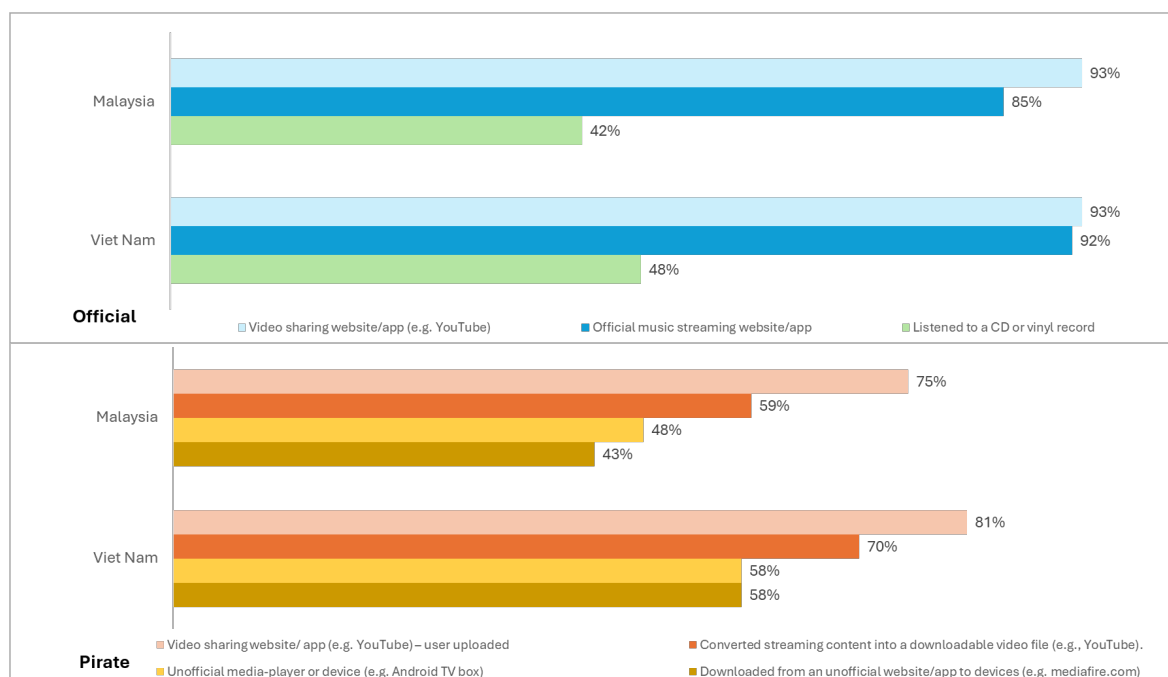


Figure 8. Publications Category - The proportion of adults aged 18-65 who have read publications in the past 12 months and the top sources of official and pirate access they use to read publications, Malaysia and Viet Nam.

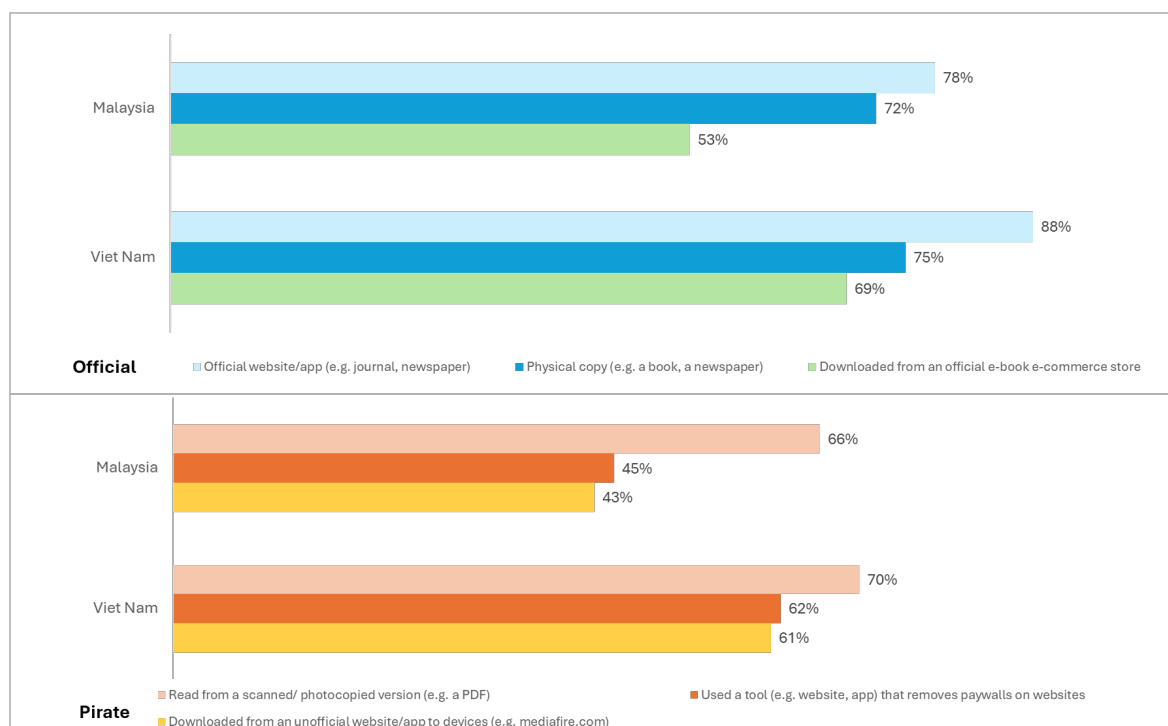
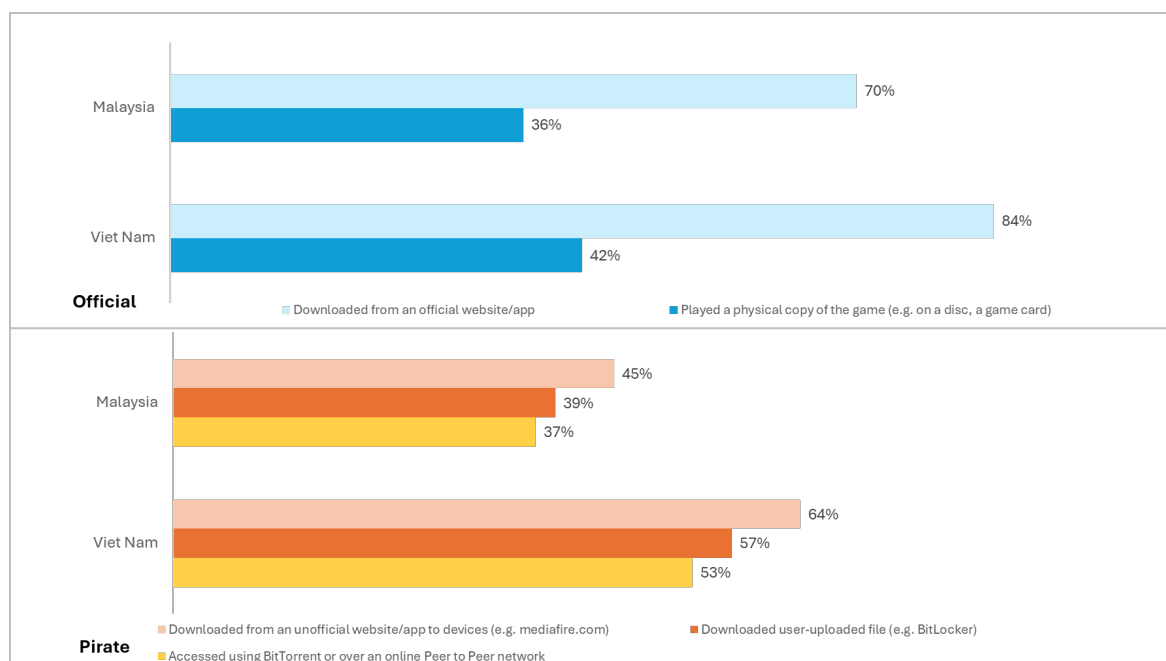


Figure 9. Software Category - The proportion of adults aged 18-65 who have used software (including video games) in the past 12 months and the top sources of official and pirate access they use to obtain software, Malaysia and Viet Nam.



Understanding depth – what proportion of time spent accessing content is related to piracy?

18. The analysis of the incidence of piracy illustrated that a high proportion of adults are using pirate sources to access content. In addition to incidence, however, it is key to also understand the *depth* of piracy – i.e. what proportion of annual consumption of content can be attributed to piracy. Depth was calculated by analyzing the amount of time spent using both official and pirate sources to access content, as reported by all respondents.

19. The overall trends observed in both countries are similar, though the figures reported in Malaysia are distinctly lower.

20. For example, in both markets, music is the category where the most time is spent accessing pirated content. In Malaysia, the use of pirate sources accounts for 42% of annual consumption, while in Viet Nam the level is similar but statistically higher (49%).

21. On the other end of the scale, the share of pirate sources in annual consumption is lowest for movies in both countries (33% in Malaysia and 39% in Viet Nam).

22. The latter observation may be a surprising one, since movies are the category with the *highest incidence* of piracy in both Malaysia and Viet Nam, while being the category with the *lowest depth* of piracy. This means that a very high proportion of consumers are consuming pirated movies, but that generally adults consume more movies from official sources than from pirate sources.

23. Indeed, in both countries, the greatest share of annual consumption of movies is in fact through official sources: In Malaysia, the source most used for consumption of movies annually is watching via any **official** website/app, e.g. a TV channel's website/app, an official paid subscription website/app, a paid rental website/app, or other official website or app (14%). In Viet Nam, watching movies uploaded to an **official** channel of a studio on a video-

sharing website app or social networking website/app makes up the largest share of annual consumption (12%). The specific access sources reported in Malaysia may align with the fact that 64% of adults 18-65 in Malaysia have access to a Netflix subscription, compared to 48% in Viet Nam (where consumption of movies is more likely to be through official channels on social media or social platforms).

24. These findings suggest that, despite the diversity of official sources being used to access content across all categories, these official sources still do not fully meet consumers' appetite for content, with the result that at least a third of annual access is through pirate sources.

III. FINDINGS

A. DIFFERENTIATING BETWEEN OFFICIAL AND PIRATE SOURCES

To what extent do adults in Malaysia and Viet Nam know how to identify pirate sources?

25. With user education being a potential key part of tackling piracy levels in the future, to help inform the education and messaging strategy it is important to establish whether users can distinguish between official and pirate sources.

26. Most adults aged 18-65 across both markets feel confident in telling official and pirate sources apart. This is consistent among consumers of pirated works and non-consumers of pirated works, suggesting an intentional choice is made by most to consume this content, and that education on the difference is less essential than informing users of other dangers or potential enforcement measures. It is important to note that this study performed no independent verification of respondents' *ability* to tell official and pirate sources apart, but rather merely measured respondents' *perception* of such ability.

27. Respondents in Malaysia expressed lower confidence in telling the difference (67%) than those in Viet Nam (75%). The level of strength of this confidence is also weaker among Malaysian respondents, with 22% *very* confident in telling the difference, compared to 38% among respondents in Viet Nam.

28. In Malaysia, consumers of pirated software have greater confidence (76%) in telling the difference between the two sources, compared to users of other pirated content.

29. In Viet Nam, however, the confidence in telling the difference between official and pirated content is even higher among consumers who consume only TV, movies or music through official sources (83% for both official-only TV and movie consumers, 86% for official-only music consumers). This finding is inconclusive as to whether this is based on prior experience of pirate sources of lower quality (possible, given the high piracy levels), or just a belief that official sources must be distinctly different due to their legitimacy.

30. When looking at demographic differences, adults aged 55-65 across Malaysia and Viet Nam have the least confidence in differentiating the sources (58% for those 55-65 and 72% for those 18-54). This indicates that this older age group may be more susceptible to unintended viewing of pirated material, and arguably the most critical group to educate on the distinction. This is particularly the case for males aged 55-65 in Malaysia (49%) and Viet Nam (61%). Malaysia also tends to see lower certainty among those aged 45-54 (59%), indicating the generational gap starts earlier in this market compared to Viet Nam, where this same age group is more assured (78%) about discerning between official and pirate sources.

31. Correlating to the differences observed in older age groups is the finding by which households with children have greater confidence in telling the difference between pirate and official sources than those households without children (69% vs. 63% for Malaysia, 77% vs. 67% in Viet Nam).

B. UNDERSTANDING CONSUMERS OF PIRATED WORKS

Who is more likely to be using pirate sources?

32. Given the prevalence of piracy in both Malaysia and Viet Nam, the profile of the average consumer of pirated content is not dissimilar from a nationally representative person from each market. However, there are some nuances between the demographics of consumers of pirated works for specific content categories.

33. The most distinctive profile is that of the consumer of pirated software. Piracy of software is a category with one of the lowest uptakes (only 46% of respondents reported consuming pirated software, as shown in Figure 2), and it does reflect a particular profile of person. Across both markets, a consumer of pirated software is more likely to be male (60%) and to be aged 18-34 (64%). Compared to consumers of other pirated content, they are also less likely to own multiple tech devices, and to skew lower income (see Appendices II.1 and II.2).

To what extent is quality considered to differ between official and pirate sources of content?

34. Understanding the perceived quality differences between officially sourced and pirated content can reveal where quality sits in the key motivations behind viewer choices.

35. This is pertinent because over half the audience in Malaysia and Viet Nam believe the quality of content from pirate sources is the same or better than that from official sources.

- In Malaysia, 38% consider pirate sources to be of a worse quality than official sources, while 51% consider that content from pirate sources is of the same (32%) or better (20%) quality.
- In Viet Nam, 40% consider pirate sources to be of a worse quality than official sources, while 57% consider that content from pirate sources is of the same (31%) or better (26%) quality.

36. There is little variation in quality perceptions between content categories consumed; however, demographically, younger users (males notably) are more likely to say pirate sources are better quality, peaking among males 18-24.

- In Malaysia, 30% of males aged 18-24 and 25% of males aged 25-34 perceive pirate sources to be better quality. Among females aged 18-24, 26% also consider pirated content to be better quality.
- This perception is stronger in Viet Nam, where younger males aged 18-24 (35%) and 25-34 (32%) are more likely to perceive pirate sources to be better quality. They are joined in this belief by females aged 35-44 (36%).

37. There is, however, a greater contrast between consumers of pirated material and those who use only official content, as the latter average much higher for perceiving the quality of pirated material to be worse.

- In Malaysia, pirate sources are perceived as worse among consumers of official-only sources at the following rates (official only users of each category followed by percentage): TV (48%), movies (47%), music (48%), publications (54%), software (57%).
- In Viet Nam, pirate sources are perceived as worse among consumers of official-only sources at the following rates (official only users of each category followed by percentage): TV (68%), movies (65%), music (64%), publications (55%), software (55%).
- Thus, data suggest that not being a current user of pirate sources may be a prominent factor in perceptions of quality being an issue with pirated content.

38. Consumers of pirated content report very divergent experiences of finding high-quality pirated content. Across categories and the two markets, around 3 in 10 of such consumers claimed “it is taking longer to find high-quality pirated content compared to 12 months ago” (ranging from 28% for publications to 32% for software). On the other hand, around a third claimed “it is quicker to find quality pirated content than official content” (ranging from 33% for publications to 37% for TV and movies respectively). The proportions of consumers of pirated works having contrasting experiences in the time needed to access high-quality pirated content is therefore roughly equal, possibly suggesting that the issue of finding high-quality pirated content is not a widespread obstacle to their media and tech consumption. See Appendices III.1 and III.2 for data in Malaysia and Viet Nam respectively.

39. Anti-piracy drives should account for the influence of perceived quality and thus would require a two-pronged approach. There may in fact be a difference in quality between official and pirated content, and a role for messaging to make this clear. However, it is worth noting that because consumers of pirated works do not consider there to be any perceived superiority in officially accessed content, campaigns with this quality focus may not always resonate. Therefore, messaging may need to additionally encourage users to care about quality differences.

What proportion of time do consumers of pirated works spend accessing content through pirate sources?

40. Among consumers of pirated content, time spent consuming official content equates to at least a third of annual time in each category in both countries and is the most common single access source. Nonetheless, this means that a significant proportion of consumption in each category and country is from pirate sources.

41. This dynamic can be illustrated by looking at a specific content category – for example music, which sees the highest volume of time spent with pirated content annually (44% in Malaysia and 52% in Viet Nam). The most common method of consuming music is an **official** one – specifically, listening to music uploaded to the official channel of a music artist/record label on a video-sharing website/app – in both Malaysia (28%) and Viet Nam (22%). Nonetheless, the pirate sources used to consume music are still significant. For example, listening to user-uploaded music via a video-sharing website/app that is **not uploaded by a music artist or recording label** is the most common pirating method in both countries at 17% in Malaysia and 16% in Viet Nam.

42. This highlights the popularity of video sharing platforms for accessing entertainment, whether using official channels or not. Another frequently used source is stream-ripping (i.e. converting streamable video/audio content into a downloadable music file): this represents 9% of time spent with music in Malaysia and 10% of time spent in Viet Nam.

43. In Malaysia, the other categories with the next greatest share of time spent using pirated content are publications (40%), software (39%), TV (36%) and movies (35%). For Viet Nam (a market with higher overall piracy), following music, the categories with the next greatest share of time spent using pirated content are software (47%), publications (43%), TV (43%) and movies (41%). Within each of the categories, consumers of pirated content use similar pirate sources across Malaysia and Viet Nam (see Appendices IV.1 to IV.5).

Figure 10. The share of annual access for each content category that derives from official or pirated content sources, among consumers of pirated content, Malaysia.

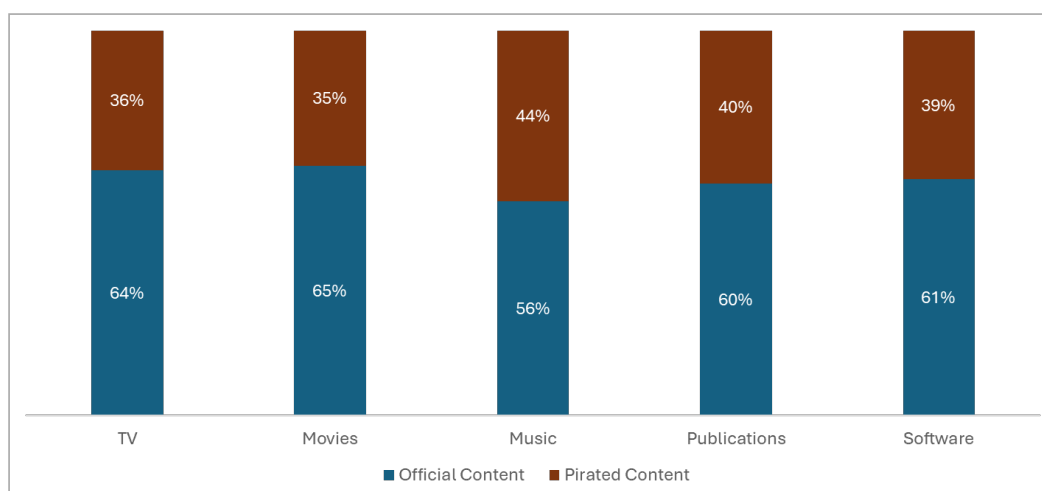
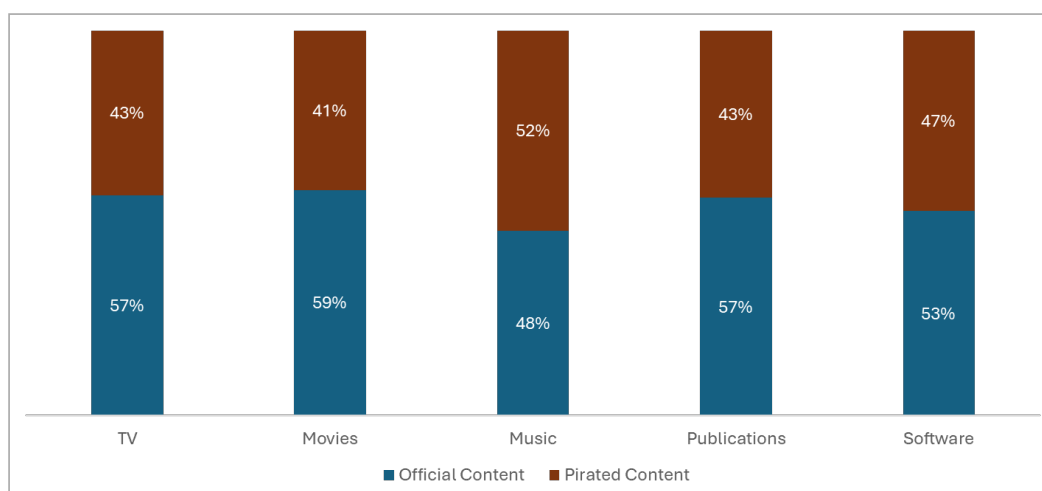


Figure 11. The share of annual access for each content category that derives from official or pirated content sources, among consumers of pirated content, Viet Nam.



How much of pirate access to content can be attributed to user-generated content and social media?

44. User-generated content (UGC) and social media feed into some of the piracy sources for accessing TV, movies and music. Just over 40% of time spent watching pirate TV comes from UGC and social media sources (45% in Malaysia, 42% in Viet Nam), and it is the same case for movies (44% in Malaysia, 42% in Viet Nam). Even for music, a form of entertainment which has fewer sources for piracy, close to a third of time spent listening to pirated music comes from UGC and social media sources (37% in Malaysia, 30% in Viet Nam). This demonstrates how prolific UGC and social media are in the conversation around piracy, and these user-led sources are difficult to regulate and can make tackling piracy more challenging.

How do consumers of pirated works find these pirate sources of content?

45. Social networking sites both host pirated content and serve as a popular resource for finding out where to access it. In Malaysia, social networking sites (49%) are a close second in popularity to search engines (50%) for finding desired pirated content. Watching YouTube/online video reviews/online demonstrations is third in popularity (45%).

46. In Viet Nam, social networking sites are the most used source for consumers of pirated works for finding the best and newest sites/services to access pirated content (60%). This source is followed by internet search engines (56%) or watching YouTube/online video reviews/online demonstrations (52%).

47. These aforementioned top three sources for finding pirated content in each market are the same across consumers of each entertainment category, highlighting how the freedom of search and social platforms makes it a go-to place for finding piracy sources.

48. Word of mouth is less common as a source, but similar proportions of consumers of pirated works are finding their sources through friends, family or colleagues in both markets (36% in Malaysia, 37% in Viet Nam).

49. Although having pirated content “shared with you via a private group/forum” is less common than the other sources, it is distinctly more popular in Viet Nam (28%) compared to Malaysia (19%). However, in Malaysia, accessing pirated content via a private group/forum is more likely among consumers of pirated publications (26%) or pirated software (26%) than for other content (see Appendix IV.6).

Is the intensity of using pirate sources changing over time?

50. Despite the prevalence of piracy across categories, it appears that many consumers are reducing how intensely they engage in this behavior. In Malaysia, around 6 in 10 adults claimed to be accessing pirated content less than they did 12 months previously (ranging 58-59% across categories). This behavior is very uniform across the media and tech categories.

51. In Viet Nam, this shift away from pirated content is somewhat less pronounced: around half of consumers of pirated content reported using pirate sources less than they did 12 months previously (ranging 45-51% across categories). TV (51%) and publications (50%) are the categories with the greatest share of consumers of pirated content shifting their behavior away from unofficial sources. Music sits on the other end of the scale (45%).

C. DETERRENTS TO USING PIRATE SOURCES

What factors would deter consumers of pirated content from using pirate sources?

52. In both Malaysia and Viet Nam, key reasons across the content categories for switching away from pirate sources were linked to the potential negative impacts of piracy. These include the risk of identity theft and devices being infected with viruses, malware, or ransomware. In Malaysia, the risk of identity theft is commonly cited as a deterrence factor for accessing pirated movies or software. For certain content categories, avoiding the harm to creators from accessing pirated content is also a top-ranked deterrent, specifically for music and publications in Malaysia and for movies and music in Viet Nam.

53. In both countries, the top reasons for switching away from pirate sources are also linked to their experience of accessing official content. Specifically, respondents reported that they would switch from pirate to official sources if official services were to offer a wider range of products, were more convenient to access, and were cheaper. For Malaysia in

particular, they would also be deterred from pirated sources if official content was available in their local region (see Figures 12 and 13).

54. Thus, digging deeper into the experience and expectations of official content may be key to reducing piracy. While messaging on the risks of accessing pirated content can influence the switch away from this behavior, the prevalent issue at hand is that consumers are hungry for content and perceive there to be roadblocks in accessing it through official channels.

Figure 12. The proportion of consumers of pirated content aged 18-65 and the reasons they would stop using pirate sources and switch to using an official source to access content, Malaysia.

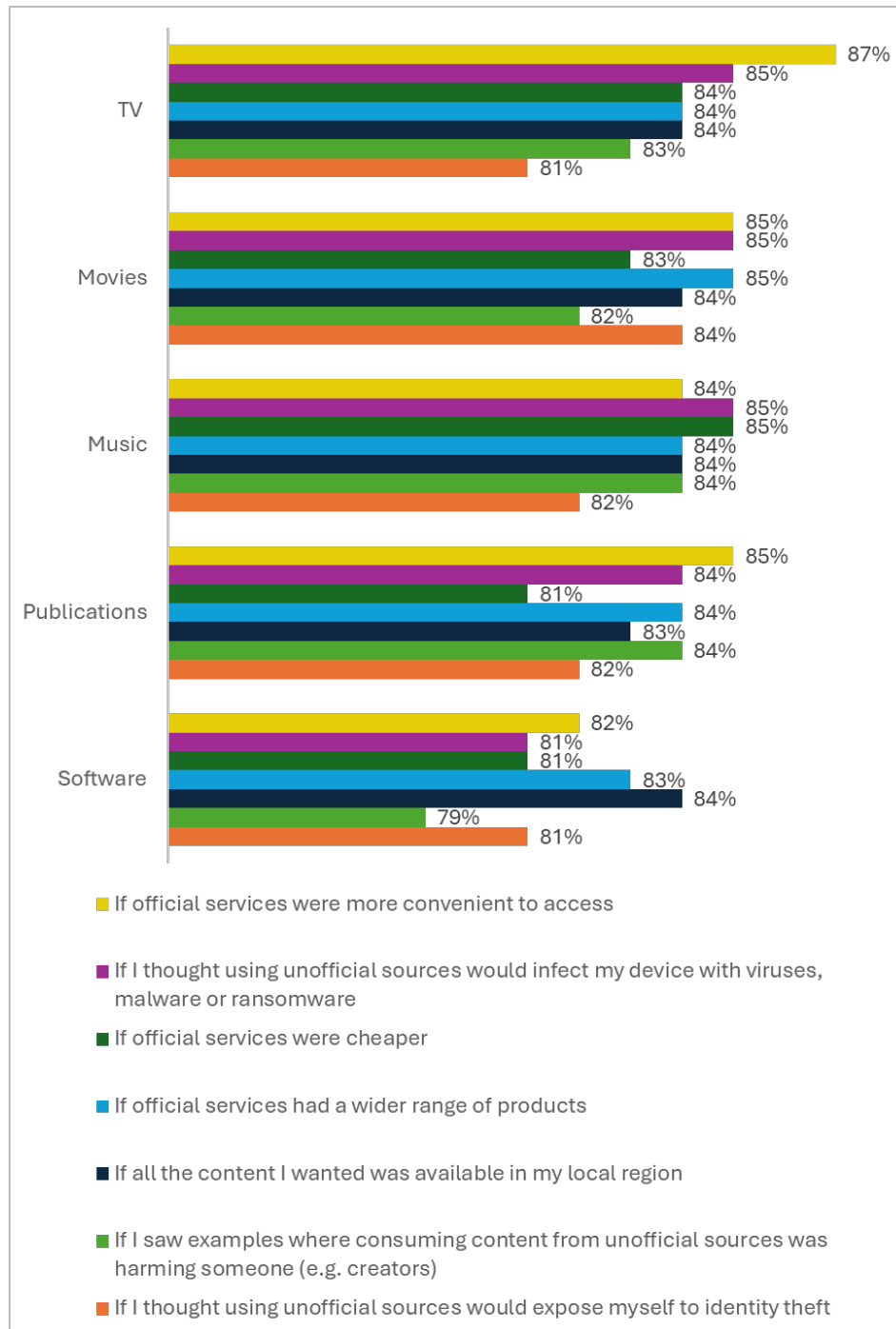
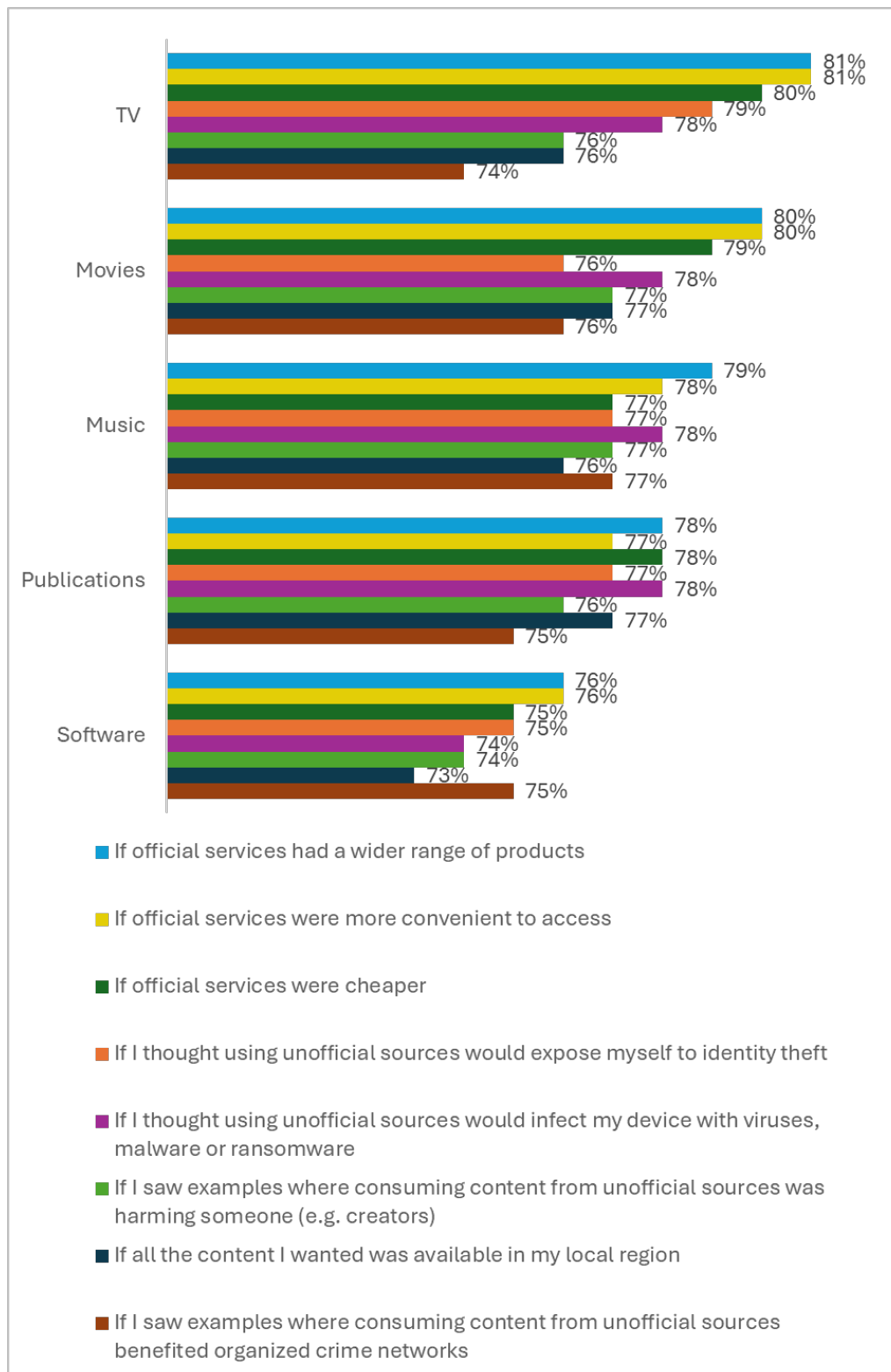


Figure 13. The proportion of consumers of pirated content aged 18-65 and the reasons they would stop using pirate sources and switch to using an official source to access content, Viet Nam.



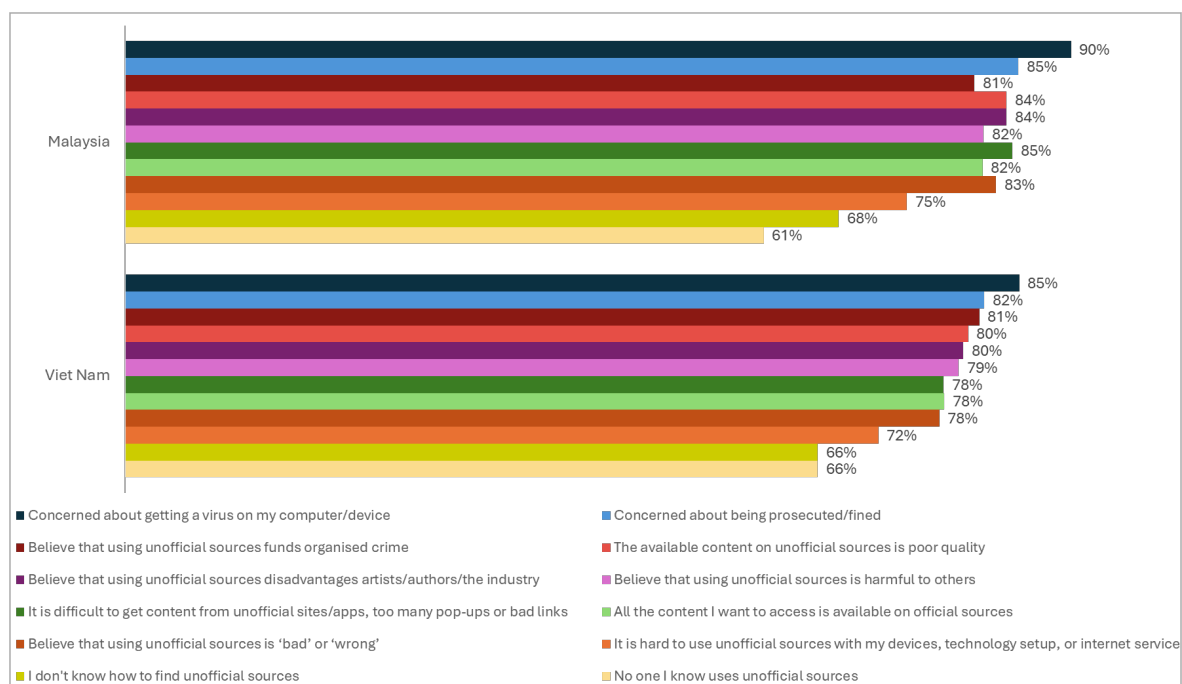
What factors deter non-consumers of pirated works from using pirate sources?

55. The concerns about safety and security reported by consumers of pirated works align with the reasons that deter non-consumers of pirated content in at least one of the entertainment categories.

56. In both countries, the top two deterrent factors cited by non-consumers of pirated content are concerns about infecting their computer/device with a virus (90% in Malaysia, 85% in Viet Nam) and being prosecuted/fined (85% and 82%, respectively). Also in both countries, the reasons with the least influence on behaviors are social stigma (i.e. not knowing anyone else who uses pirated content) (61% in Malaysia, 66% in Viet Nam) and not knowing how to access pirated content (68% in Malaysia, 61% in Viet Nam).

57. There is some variation in the third-most important factor cited between the countries: In Malaysia, it is poor-quality experience (i.e. difficulty getting content due to too many pop-ups or bad links) (85%), while in Viet Nam it is the belief that using unofficial sources fund organized crime (81%). Despite this nuance, the responses indicate that, for consumers in both countries, the most influential deterrence factors relate to the possibility of serious consequences from piracy that jeopardize the consumer's own safety or mean that they are complicit in crime.

Figure 14. The proportion of non-consumers of pirated content aged 18-65 and the reasons they do not use pirate sources to access content, Malaysia and Viet Nam.



Would consumers of pirated works be willing to switch to using official channels to access content if pirate sources were not available?

58. The top deterrent factors cited by consumers of pirated content are echoed in their responses regarding how they believe they would behave if they were not able to use their usual unofficial sources to access content.

59. Almost all consumers of pirated TV claim that if pirate sources were not available, they would switch to using an official source to access content (93% in Malaysia and 94% in Viet Nam). The most common action they would take is to make the most out of the official

sources to which they already have access, such as their existing video subscription services (77% in Malaysia and 72% in Viet Nam) or their cable/satellite TV service (75% in Malaysia and 70% in Viet Nam). However, high proportions would also be willing to subscribe to a new online streaming service (68% in Malaysia and 65% in Viet Nam) or pay for a new subscription with a cable or satellite TV provider (58% in Malaysia and 66% in Viet Nam).

60. A similar story emerges for consumers of pirated movies, whereby 93% in both Malaysia and Viet Nam report that they would shift to using official sources if pirate sources were not available. Most would make more use of their existing video subscription services (77% in Malaysia and 70% in Viet Nam) or their cable/satellite TV service (73% in Malaysia and 68% in Viet Nam). There are also high proportions willing to subscribe to a new online streaming service (66% in Malaysia and 63% in Viet Nam) or pay for a new subscription with a cable or satellite TV provider (59% in Malaysia and 66% in Viet Nam). High proportions would also be willing to visit the cinema more often (59% in Malaysia and 62% in Viet Nam).

61. Consumers of pirated publications are less likely to switch to official sources in Malaysia (82%) compared to Viet Nam (90%). This is true across all sources, whether it involves downloading e-books from e-commerce stores (65% in Malaysia, compared to 71% in Viet Nam), subscribing to news journalism apps/websites (60% in Malaysia, compared to 72% in Viet Nam) or using a library app (63% in Malaysia, compared to 68% in Viet Nam).

62. For consumers of pirated software, around 3 in 4 would be likely to download software from official websites/apps if pirate sources were not available (77% in Malaysia and 75% in Viet Nam). This also goes for gaming software: in both markets, they would be likely to download games from official stores (81% in Malaysia and 77% in Viet Nam) and buy more physical copies of games (more common in Malaysia at 67% than in Viet Nam at 59%).

63. Across Malaysia and Viet Nam, at least 7 in 10 consumers of pirated music are likely to switch to an official source if pirate sources were not unavailable, with consumers in Malaysia being less likely to do so (70% in Malaysia as compared to 75% in Viet Nam). High proportions of consumers in both countries are also likely to subscribe to a new music streaming service (66% in Malaysia and 69% in Viet Nam). However, consumers are less likely to consume greater volumes of physical media, such as CDs or vinyl records (35% in Malaysia and 37% in Viet Nam).

64. Ultimately, consumers of pirated content are lovers of media and technology and are taking a variety of avenues to access what they want – even if this means using pirated content. However, their responses suggest that, if their access to pirate sources were blocked, their desire to listen to their favorite songs and catch up with their favorite TV shows would motivate them to switch to legitimate sources to do so.

IV. CONCLUSION

65. **Accessing pirated content through various sources is widespread across Malaysia and Viet Nam, and the behaviors of consumers of pirated content are mostly similar across the two markets.** In both markets, more than 9 out of 10 respondents have accessed at least one content category through pirate sources (93% in Malaysia, 94% in Viet Nam). However, consumers in Viet Nam access pirated content through a wider variety of sources. They also use pirate sources across more categories (Figure 4), and a greater share of their annual consumption can be attributed to piracy (Figures 10-11). This suggests strong demand for the content categories that consumers want, regardless of whether they access through official or pirated means.

66. Greater understanding of consumers' experience of accessing official channels could reduce the incidence of piracy across content categories. The use of pirate sources to access content is widespread, but it is not driven by a lack of access to official sources. In fact, the most common ways that adults aged 18-65 in Malaysia and Viet Nam access content are via official sources (Figures 5-9). The majority of consumers in each market also believe they can differentiate between official and pirated content (67% in Malaysia, 75% in Viet Nam), so it is unlikely that consumption of pirated content is unintended. Some of the key factors that consumers state would motivate them to switch from pirate sources to using official sources relate to official media (i) better meeting their appetite for content, (ii) being less expensive and (iii) being more convenient (Figures 12-13). Further work is needed to better understand (i) what it means to a consumer to have a service that is convenient and meets their range of content/access needs, (ii) whether this requires a better understanding among consumers of the boundaries that official channels have when providing official content, and (iii) whether official channels need to work on their packaging and positioning.

67. Blocking access to pirate sources can push consumers of pirate sources toward official sources. The most common ways that the best and newest sites/services for pirated content are found are via social networking sites (49% in Malaysia and 60% in Viet Nam); search engines (50% in Malaysia and 56% in Viet Nam); and watching online video reviews or demonstrations, for example on YouTube (45% in Malaysia and 52% in Viet Nam). Significantly, consumers of pirated works claim that, if pirate sources were not available, they would still continue their consumption of content by switching to using official sources for that content. This willingness to switch to official sources is highest for TV (93% in Malaysia and 94% in Viet Nam) and lowest for software (77% in Malaysia and 75% in Viet Nam).

68. There is a notable behavioral change to tackle when it comes to the intersection of piracy and social media. A large share of the most highly pirated categories (music, TV, movies) is found on social media, reaching as high as 45% of time spent watching pirated TV in Malaysia. This means that much of pirated music, TV and movies are both readily available at the fingertips of most adults and hosted on a platform that is a challenging space to regulate. This challenge comes from the need for collaboration across the social platform's own self-regulation initiatives, user reporting, and government-led regulatory bodies and committees. Thus, to move the needle away from using these pirate sources, the mindset on piracy would need to change so that adults see it as an undesirable action. This could be through public campaigns to build awareness about the negative impact of consuming pirated content.

69. Public campaigns could benefit from approaching consumers using a loss-aversion perspective. The responses suggest that focusing on what users could lose or risk by using pirate sources could be an effective means to discourage piracy. This includes leaning on some of the biggest concerns that consumers of pirated works have about accessing pirate sources, such as security (e.g. viruses, malware or ransomware; identity theft) or social morality (e.g. using pirate sources harms creators) (see Figures 12-13). Consumers of pirated content would need to become aware that these risks are very real for themselves, and not a distant possibility. Further, consumers' desire to respect those who create and produce the media that they enjoy could be effective in creating an environment where the use of pirate sources is not seen as acceptable.

70. Reducing piracy would require more than just a one-size-fits-all approach, and more work is needed to test how to leverage the most successful messaging. This approach should not rely on targeting certain demographics only. For example, while some older people in Malaysia and Viet Nam are less confident at identifying pirated content and

could benefit from education on this, focusing on this demographic would be insufficient – a range of approaches to engage with all demographic cohorts would be required. Some adults may respond better to the reappraisal of the safety/legitimacy of official sources, whereas others may respond better to a focus on the dangers of accessing pirated content. Results indicate that there is a range of levers that can be used, allowing different providers and organizations to address the issues from different angles. Further, research needs to be done on which channels consumers of pirated content would be most receptive to when they see these messages, whether it is where they are already accessing pirated content (e.g. social media, video sharing platforms), or in environments external to their media consumption (e.g. billboards, posters).

V. APPENDICES

APPENDIX I EXTENDED TECHNICAL NOTES

Appendix I.1. Survey design and statistical significance

Ipsos conducted a 20-minute online survey on the Ipsos Omnibus, asking respondents about claimed behaviors over the past 12 months. Thus, the survey does not capture behaviors that happened more than 12 months previous to the survey.

Due to the sensitivity of asking about behaviors that are less socially desirable (i.e. piracy), respondents were assured that their responses were anonymous. Further, within the survey, the sources for accessing content were positioned as the brand/website name OR official/unofficial. Respondents were primed to understand this terminology by the following description:

“We will be asking about **official services providing content**, including websites and apps, that **have permission to provide that content**. There are also many other ways in which content can be accessed **without the copyright owner’s permission**. We may think of these as ‘unofficial sources’. We will be asking about these too.”

The survey asked only about use of digital pirate sources and did not capture pirating that happens offline (physical).

Comparisons made on whether data points are higher or lower than one another (i.e. on higher or lower proportions in the data) are based on statistically significant differences. All significance testing was calculated at the 95% confidence level. Sample size was n=2,000 per market, so for market-level comparisons the confidence intervals range from 1.3% to 2.2%.

Appendix I.2. List of official sources surveyed

Official sources	Content categories
Watched via any official website/app, such as a TV channel’s website/app, an official paid subscription website/app (e.g. Netflix), a paid rental website/app or other official website or app (e.g. iQIYI)	TV, Movies
Watched “on demand” as part of an official online paid subscription service (e.g. Netflix), or “on demand” for free from an official website/app with advertising (e.g. Viu, WeTV)	TV, Movies
Watched at the cinema	Movies
Watched at the time of airing/broadcast, on an official website/app (e.g. a TV channel, cable/satellite provider, or online official provider)	TV, Movies
Watched through an official service where you pay for each occasion you watch or pay to download (e.g. Prime Video)	TV, Movies
Listened via an official music streaming app or website , where music is uploaded by the artist or with the artist’s permission	Music
Listened to a CD or vinyl record	Music
Watched TV shows/movies uploaded to an official channel of a studio on a social networking website/app (e.g. TikTok)	TV, Movies

Watched TV shows/movies uploaded to an official channel of a studio on a video-sharing website/app (e.g. YouTube)	TV, Movies
Listened to music uploaded to the official channel of a music artist / record label on a video-sharing website/app (e.g. YouTube)	Music
Downloaded from an official e-book e-commerce store	Publications
Rented from a library app	Publications
Accessed on the official website/app of a publication (e.g. journal, newspaper)	Publications
Read a physical copy of the publication (e.g. a book, a newspaper)	Publications
Played a physical copy of the game (e.g. on a disk, a game card)	Software
Downloaded from an official website/app for the software, or a digital store	Software

List of pirate sources surveyed

Pirate sources	Content categories
Downloaded from an <u>unofficial</u> website/app to one of my devices (e.g. mediafire.com)	TV, Movies, Music, Publications, Software
Accessed using an <u>unofficial streaming</u> website/app	TV, Movies
Accessed using BitTorrent or over an online peer-to-peer network	TV, Movies, Music, Publications, Software
Accessed through <u>unofficial</u> apps/add-ons to a media player or device (e.g. Kodi, Plex (community sharing))	TV, Movies, Music
Accessed through <u>unofficial</u> media players or devices (e.g. Android TV box)	TV, Movies, Music
Watched user-uploaded TV shows/movies on a social networking website/app (e.g. TikTok) – not uploaded by a channel or studio	TV, Movies
Watched user-uploaded TV shows/movies via a video-sharing website/app (e.g. YouTube) – not uploaded by a channel or studio	TV, Movies
Listened to user-uploaded music via a video-sharing website/app (e.g. YouTube) – not uploaded by a music artist or recording label	Music
Downloaded a user-uploaded file uploaded to a password-protected locker site (e.g. BitLocker)	TV, Movies, Music, Publications, Software
Read from a scanned/ photocopied version uploaded on a website (e.g. a PDF)	Publications
Used a tool (e.g. website, app) that removes paywalls on websites	Publications
Converted streamable video/audio content (e.g. a YouTube video) into a downloadable music file	Music

Converted streamable video content (e.g. a YouTube video) into a downloadable video file	TV, Movies
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APPENDIX II CONSUMERS OF PIRATED WORKS

Appendix II.1. Profile of consumers of pirated content in terms of gender, age, device ownership and income, Malaysia

	Percentage of total respondents	Percentage of consumers of pirated content in each content category				
		TV	Movies	Music	Publications	Software
Male	50%	50%	50%	50%	51%	56%
Aged 18-34	47%	46%	48%	50%	48%	57%
Average number of devices owned	4.62	5.28	5.21	5.16	5.47	4.83
Lower income*	43%	40%	39%	40%	37%	44%

*Lower income in Malaysia defined as having a household income equal to or less than 4,999 Malaysian ringgit a year

Appendix II.2. Profile of consumers of pirated content in terms of gender, age, device ownership and income, Viet Nam

	Percentage of total respondents	Percentage of consumers of pirated content in each content category				
		TV	Movies	Music	Publications	Software
Male	50%	50%	49%	48%	50%	53%
Aged 18-34	42%	40%	43%	43%	42%	47%
Average number of devices owned	4.50	5.20	5.02	5.03	5.17	4.77
Lower income**	23%	18%	19%	18%	18%	25%

**Lower income in Viet Nam defined as having a household income equal to or less than 15,000,000 Vietnamese dong a year

APPENDIX III PERCEPTIONS OF QUALITY OVER TIME

Appendix III.1. The proportion of consumers of pirated content aged 18-65 who reported that finding high-quality copies of pirated content was taking more time or less time than it did 12 months previously, Malaysia

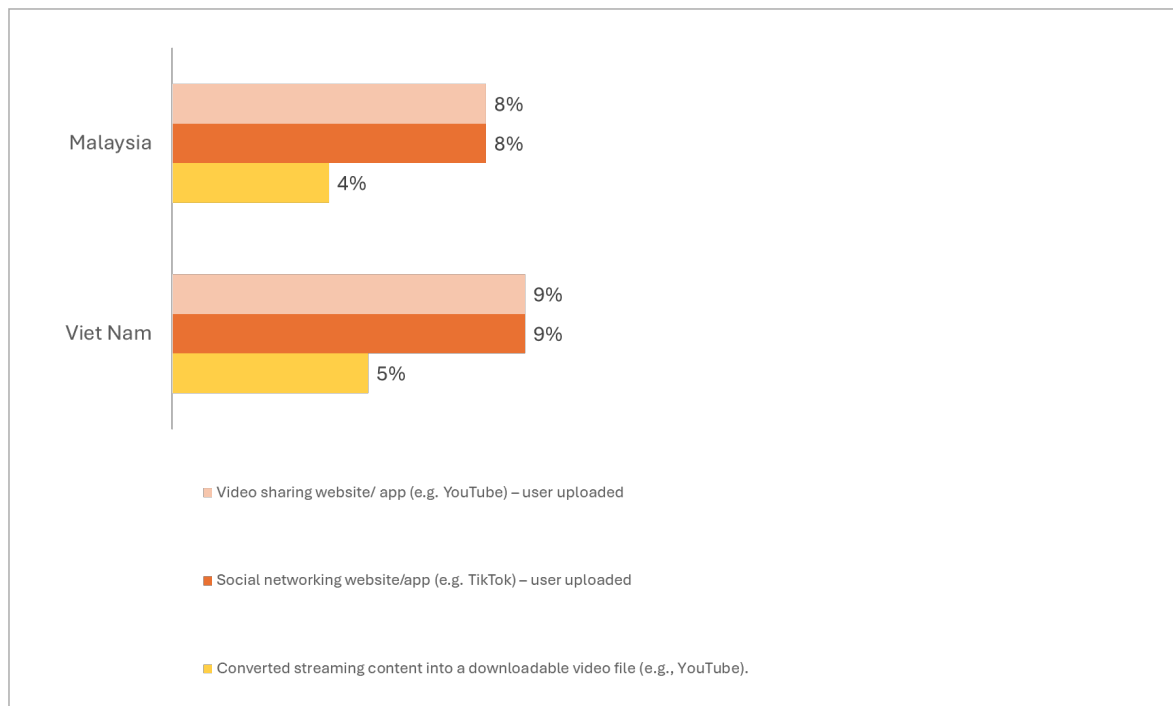
	TV	Movies	Music	Publications	Software
Taking a lot / a little less time than 12 months previously	32%	33%	31%	33%	32%
Taking a lot / a little more time than 12 months previously	30%	30%	29%	28%	32%

Appendix III.2. The proportion of consumers of pirated content aged 18-65 who reported that finding high-quality copies of pirated content was taking more time or less time than it did 12 months previously, Viet Nam

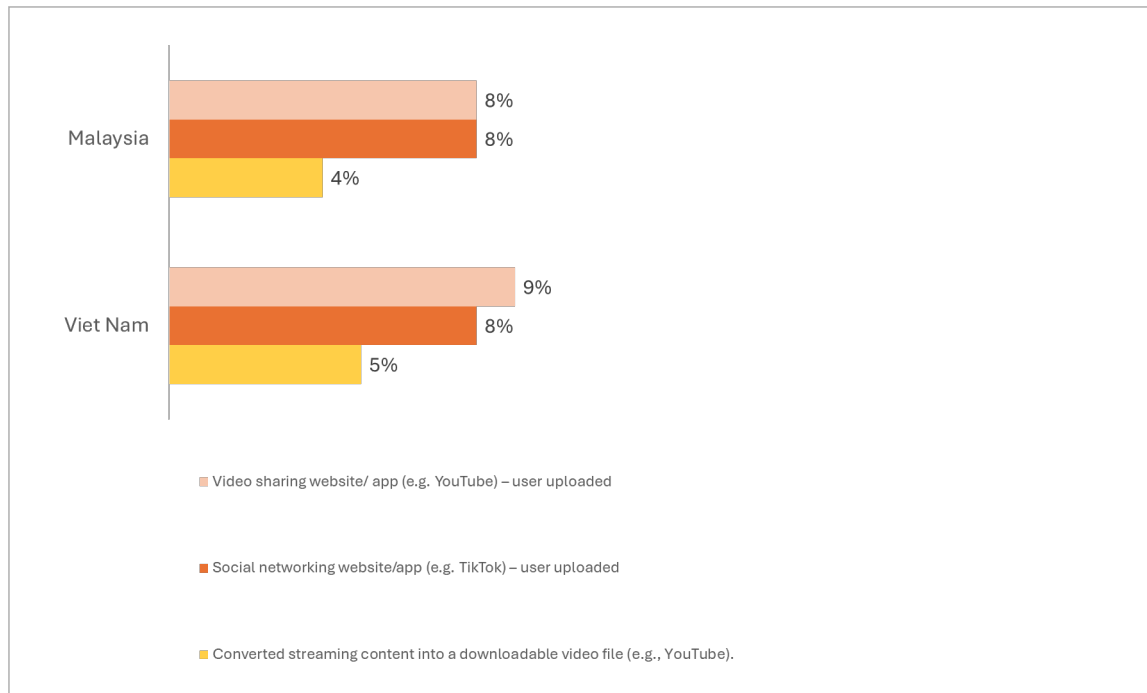
	TV	Movies	Music	Publications	Software
Taking a lot / a little less time than 12 months previously	37%	37%	35%	33%	35%
Taking a lot / a little more time than 12 months previously	31%	30%	29%	29%	31%

APPENDIX IV BREAKDOWN OF TOP PIRATE SOURCES

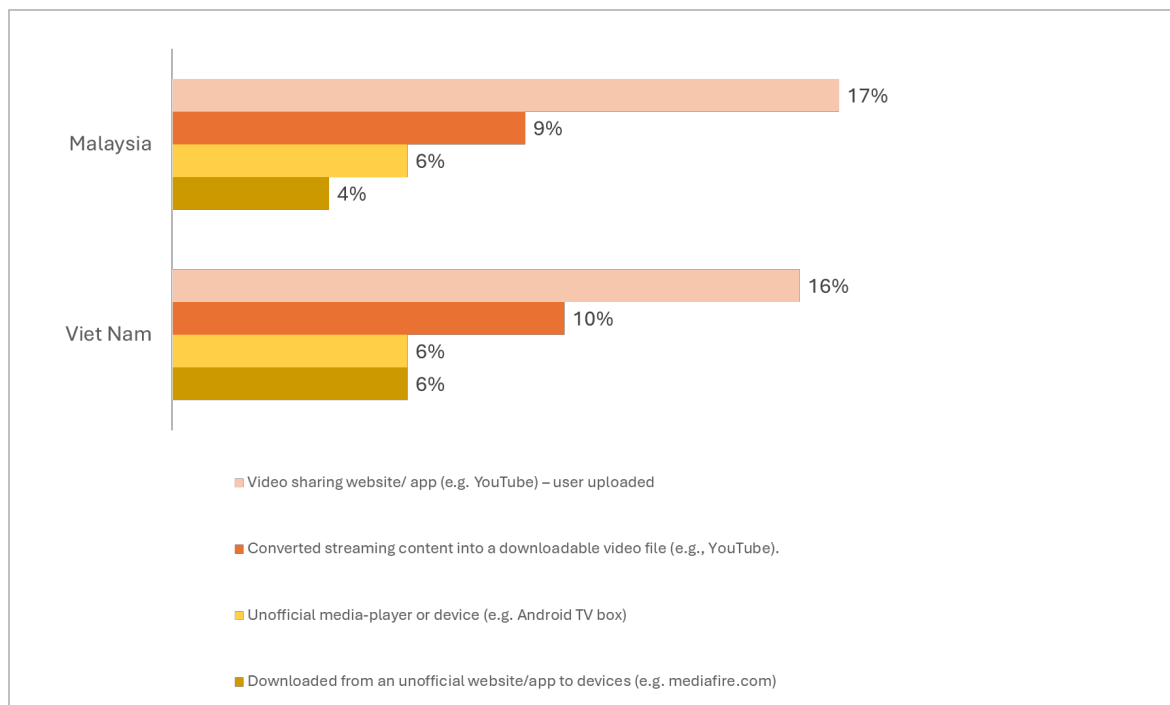
Appendix IV.1. TV Category – The proportions of the top three pirate sources used for viewing TV among consumers aged 18-65, Malaysia and Viet Nam.



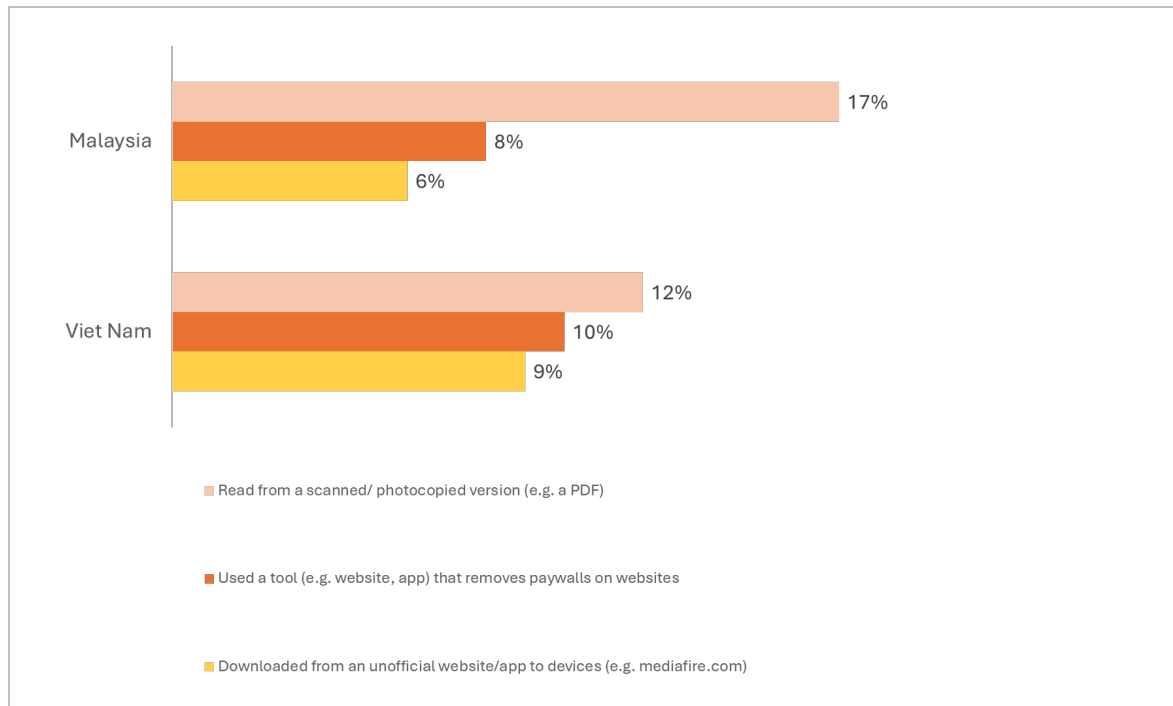
Appendix IV.2. Movies Category – The proportions of the top three pirate sources used for viewing movies among consumers aged 18-65, Malaysia and Viet Nam.



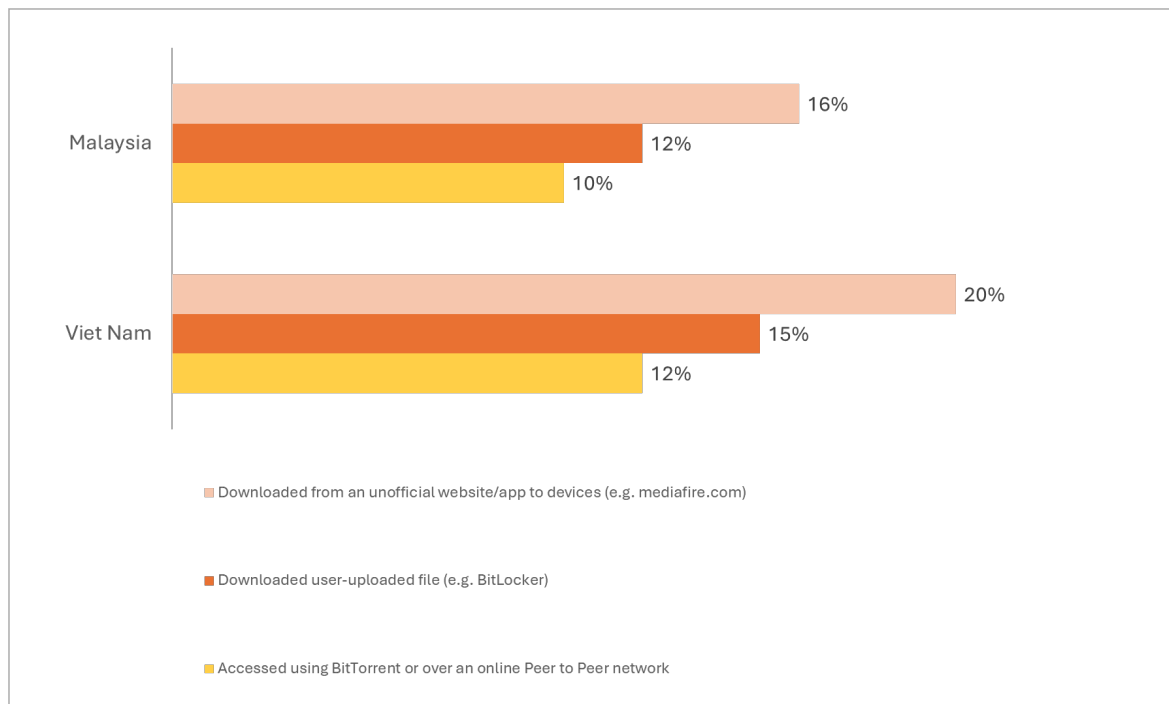
Appendix IV.3. Music Category – The proportions of the top three pirate sources used for listening to music among consumers aged 18-65, Malaysia and Viet Nam.



Appendix IV.4. Publications Category – The proportions of the top three pirate sources used for reading publications among consumers aged 18-65, Malaysia and Viet Nam.



Appendix IV.5. Software Category – The proportions of the top three pirate sources used for using software (including playing games) among consumers aged 18-65, Malaysia and Viet Nam.



Appendix IV.6. Proportion of consumers of pirated content who find out about the best and newest sites/services to access content via a private group/ forum, Malaysia.

		Percentage of consumers of pirated content in each content category				
	Total	TV	Movies	Music	Publications	Software
Shared with me on a private group / forum (e.g. Discord)	19%	21%	21%	21%	26%	26%