# **Guidelines for Placement of Online Advertising**

網路廣告指標

International Developments and the Situation in Taiwan

國際發展與台灣現況

### Agenda for Today

## 今天的議程

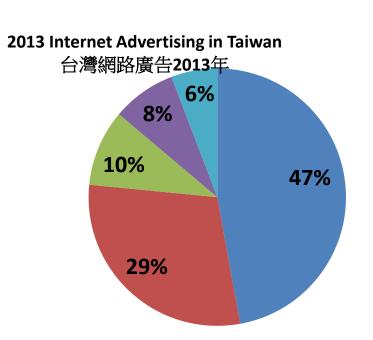
- Online Advertising's growing importance
   網路廣告增長與其重要性
- Advertising on Pirate Websites International Awareness 盗版網站上的廣告 – 國際重視
- Advertising on Taiwan Pirate Websites an initial exploratory study
   台灣盜版網站的廣告 最初的研究調查
- Mainstream Brand Pollution on Pirate Sites
   公眾廣告在盜版網站宣傳 品牌受汙染
- International Awareness Produces Action
   國際察覺行動
- What Can be Done in Taiwan 台灣可以強化的部分

#### Market of Internet Advertising in Taiwan

台灣網路廣告市場

#### Forecast at NT\$ 13.86 Billion in 2013 預測台幣 \$13.86 億(2013)

Internet Search Advertising estimated at nearly NT\$4.1 Billion 網路關鍵字廣告約台幣4.1億



| Category<br>項目                  | 5 Year Growth Rate<br>5年成長分析<br>(2013-2017) |
|---------------------------------|---|
| Website Banner<br>Ads<br>網路旗幟廣告 | 3.20%                                       |
| Search<br>關鍵字廣告                 | 4.40%                                       |
| Mobile<br>行動廣告                  | 15.70%                                      |
| Social/Buzz<br>社群口碑行銷           | 8.40%                                       |
| Video/Rich Media<br>影音/多媒體廣告    | 33.80%                                      |

|           | Website Banner Ads | Search  | Mobile  | Social/Buzz | Video/Rich Media |
|-----------|--------------------|---------|---------|-------------|------------------|
| NT\$ (Bn) | \$6.536            | \$4.074 | \$1.331 | \$1.116     | \$0.803          |

Sources: Digital Marketing Association and PwC

## The Problem 現況問題

#### **Advertising Funds Piracy Sites**

### 廣告資金協助盜版網站的生存

A recent study found that the two fastest growing types of Piracy Sites are financed primarily by Advertising. 最近一個調查指出,兩個增長最快的盜版網站主要的資源來自廣告P2P Communities (P2P 社群):

- #1 Growth Segment among Piracy Sites (61% increase in Page Views)
   在盜版網站中,是增長最快的部分 (增加61%的網站人氣)
- Second Largest Segment in the Study (19% of Piracy Sites) 在調查中, 部分比例是第二大 (佔由盜版網站的19%)
- 86% of funds from Ads
   86% 資源來自於廣告

Live TV Gateway (Live TV 通道):

- \* #2 Growth Segment among Piracy Sites (17% increase in Page Views) 在盜版網站中,是增長第二快的部分 (增加17%的網站人氣)
- Largest Segment in the Study (33% of Piracy Sites) 在調查中, 部分比例是第一大 (佔由盜版網站的33%)
- 67% of funds from Ads
   67% 資源來自於廣告

#### Subscription 訂閱:

- Growth Information and % of Funds from Ads unavailable from study 調查中沒有增長資料與百分比的資料
- Smallest Segment in the Study (5% of Piracy Sites) 在調查中,部分比例是最小的 (佔由盜版網站的5%)
- Most Vulnerable Segment (e.g. Mega/Kim Dotcom)
- 最弱的部分 (列如: Mega/Kim Dotcom)

#### **Advertising Funds Piracy Sites**

#### 廣告成為支持盜版網站的資源

music:)ally

Ads are key funding source for piracy sites claims PRS / Google study PRS / Google 調查指出廣告是盜版網站主要的財金資源

#### **Broadband TV News**

61% growth in Live TV piracy Live TV 盜版成長到61%

The six business models for

六個違反版權的商業模式

A data-driven study of websites considered to be infringing copyright

copyright infringement



A Google & PRS for Music commissioned report with research conducted by BAE Systems Detica Commenting on the report Google's Theo Bertram, a former Downing Street adviser said: "Our research shows there are many different business models for online infringement which can be tackled if we work together. The evidence suggests that one of the most effective ways to do this is to follow the money, targeting the advertisers who choose to make money from these sites and working with payment providers to ensure they know where their services are being used." 評註這個調查, Google人員Theo Bertram, 前任 Downing Street

顧問"我們的調查指出網路違反與盜版有很多不一樣的商業模式,而如果我們一起合作,一定可以解決的.證據指出最有效的解決方法是跟隨資金,針對選擇使用這種網站來宣傳的廣告者,且與轉款公司合作與溝通他捫服務已被用來支持現狀.

techradar.

Google study reveals growing live TV piracy Google 調查指出 Live TV 盜版增長

The report is primarily concerned with how pirates make money and (of course) how much rights holders are missing out on, concluding that display advertising makes pirates the most plunder, although some sites also make money from subscriptions, donations and even by selling digital files. 調查焦點在盜版網站如何賺錢與(當然)版權者究竟損失了多少錢, 結論判定為展現廣告提共盜版網站最多的盜竊,雖然有些網站還有更多資源來自於會員費,捐款,與賣電子文件.

#### Google and PRS For Music Study:

#### **Advertising Funds Piracy Sites**

#### 廣告是盜版網站的資源

### USCAnnenberg Innovation Lab

#### **USC Annenberg Lab Ad Transparency Report**

January 5, 2013

This is the first in a monthly series of reports from the Annenberg Innovation Lab at the University of Southern California that details support by Online Ad Networks of the major pirate movie and music sites around the world. The advertising business has always been a key part of the creative economy from the birth of radio. Advertising dollars have financed the production of television, music and even video games. The rise of adsupported pirate networks is a relatively new phenomenon stemming from the birth of peer to peer (P2P) Internet sites in 2001. In the last five years, a large number of new advertising networks now service the seemingly infinite advertising inventory of the broadband era. Much of that inventory sits on more than 150,000 pirate entertainment sites. The top ten advertising networks placing the most advertisements to Illicit file sharing sites are: <sup>1</sup>

- 1. Openx
- 2. Google (including Double Click)
- 3. Exoclick
- 4. Sumotorrent
- 5. Propellerads
- 6. Yahoo (including Right Media)
- 7. Media Shakers
- 8. Yesads
- Infolinks
- tribalfusion.com

The list of top infringing sites was compiled using the <u>Google Transparency Report</u> of domains with the most Digital Millennium Copyright Act (DMCA) takedown requests.



New international reports will name and shame brands which advertise on websites that feature pirated film and music content 新的國際報導將會指名與羞愧各種在盜版網站宣傳(含有盜版電影與音樂)的品牌。

## Los Angeles Times

Report links Google, Yahoo to Internet piracy sites 報導指出 Google 與Yahoo 跟盜版網站有關聯

They're among the top advertising networks that support major music, film and TV piracy sites, according to a new analysis that USC's Annenberg Innovation Lab hopes will help companies avoid exploitative websites.

USC Annenberg Innovation Lab 指出他們(Google , Yahoo) 是領先支持音樂與電影盜版網站的廣告廣播網。



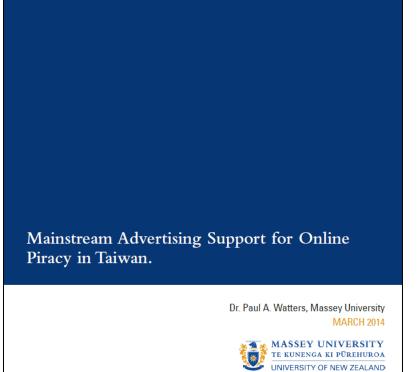
Study: Google No. 2 in Piracy Ad Placements 調查指出: 盗版網站廣告宣傳 Google 排行第二

Jonathan Taplin, director of the USC Annenberg Innovation Lab, says actions need to be taken to prevent pirate websites from getting advertising support.

Jonathan Taplin, USC Annenberg Innovation Lab主任說需要盡快行動,防止盜版網站收到廣告資金的幫助

#### USC Annenberg Lab Ad Transparency Report:

# Massey University/ ICSL Study: TITLE OF REPORT



#### Methodology 方法論

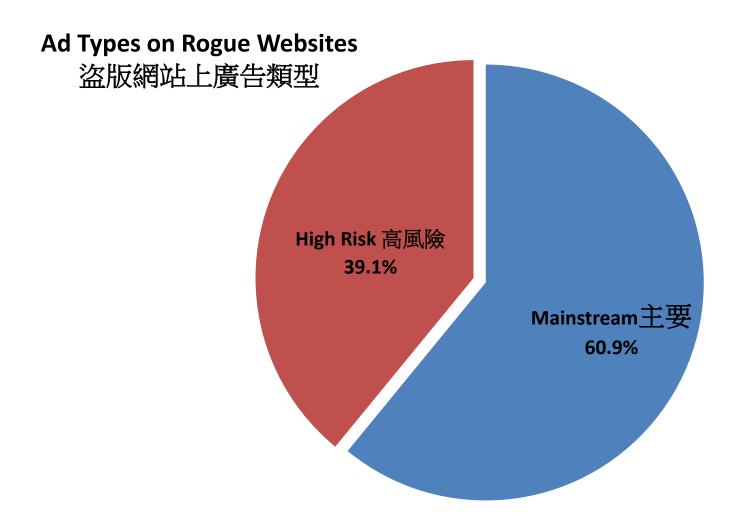
- Survey of 10 egregious pirating websites popular in Taiwan using 10 globally popular Films and TV Shows 調查10個在台灣最普遍且嚴重盜版的網站,在網站上使用10個國際知名的電影與電視劇當關鍵字
- Two weeks of data collection (November 1 November 14, 2013)
   兩個禮拜的觀察與資料收集 (11月1-14號, 2013)
- Identified Advertisers through a combination of analysis of ad objects and manual observation.
  用分解廣告軟體與人工關查找出了廣告者
- Ad Networks were identified using AdBlock System to identify Ad Objects

   The Control of the Control of

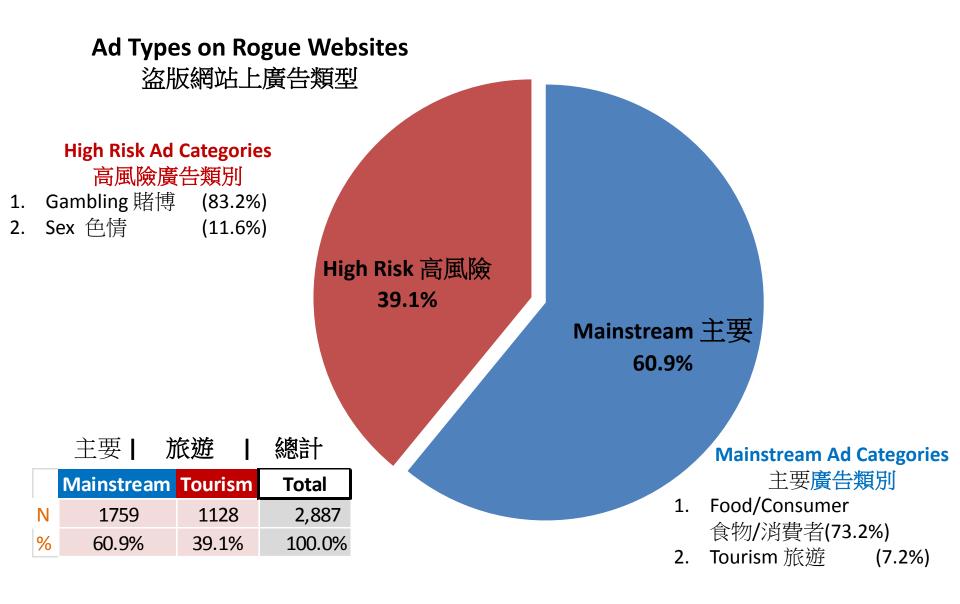
廣告廣播網由Ad Block System來分辨 Ad Objects, 而被找到

• NOTE: Many Taiwan websites use domestic/local ad networks, so many of the common terms or "Easy List" terms in English did not produce as many results. After the study was concluded, Chinese Ad Networks released "Easy List" terms. 很多台灣網站都使用本地的廣告廣播網,所以很多普遍名詞或 "簡單" 英文名詞搜尋不到很多結果。調查結束後,中文廣告廣播網才發行 "簡單"名詞.

Results of Massey University Study: Advertising on Piracy Sites in Taiwan Massey University大學調查的結果: 台灣盜版網站廣告描述

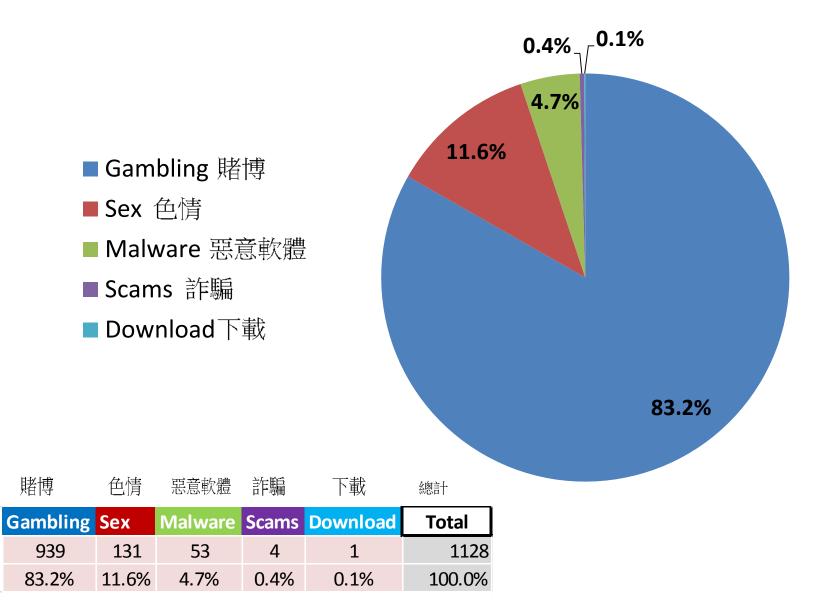


## Results of Massey University Study: Advertising on Piracy Sites in Taiwan Massey University大學調查的結果: 台灣盜版網站廣告描述



#### High-Risk Advertisers: Category Breakdown

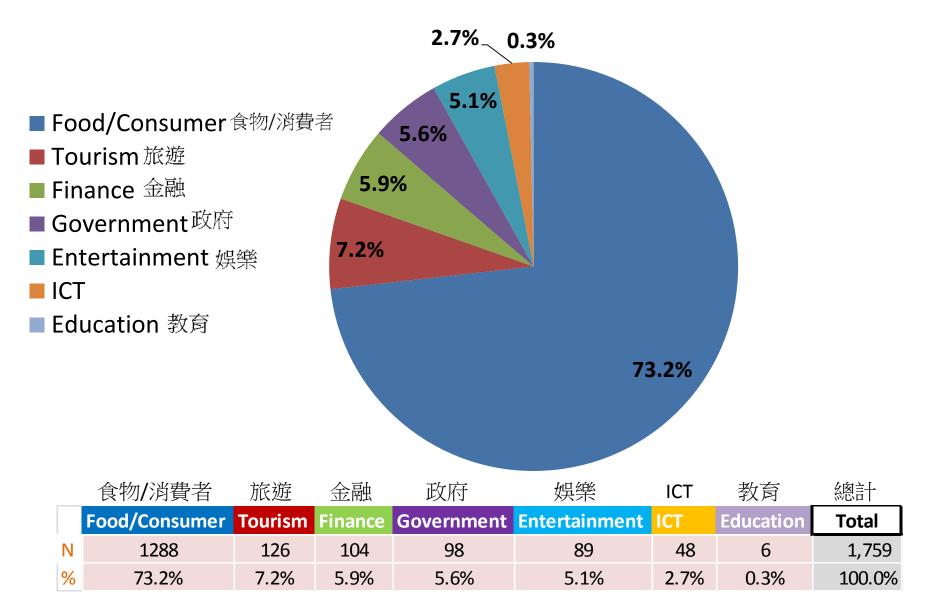
高風險廣告:類別分解



%

#### Mainstream Advertisers: Category Breakdown

主要廣告: 類別分解



#### Piracy Sites: Category Breakdown

盗版網站:類別



Mainstream Ads 主要廣告: 100%

Taiwan Alexa Rank 台灣Alexa排行: 107

High Risk Ads 高風險廣告: **0%** 

In Taiwan, More Popular Sites - Greater % of Mainstream Ads 在台灣, 越有人氣的網站 – 主要廣告越多



Taiwan Alexa Rank 台灣Alexa排行: 7,719

Mainstream Ads 主要廣告: **0%** 

High Risk Ads 高風險廣告: **100%** 

#### Piracy Sites: Category Breakdown

盗版網站:類別

| Site Name<br>網站名稱 | Taiwan Alexa Rank<br>台灣 Alexa 排行 | High Risk %<br>高風險 % | Mainstream %<br>主要 % |
|-------------------|----------------------------------|----------------------|----------------------|
| Fun698.com        | #50                              | 74.6%                | 25.4%                |
| TW116.com         | #107                             | 0.0%                 | 100.0%               |
| Funshion.com      | #271                             | 80.0%                | 20.0%                |
| Yyets.com         | #607                             | 37.4%                | 62.6%                |
| 9tvb.com          | #1,452                           | 3.0%                 | 97.0%                |
| Qiredy.com        | #1,850                           | 0.4%                 | 99.6%                |
| Dlkoo.com         | #2,057                           | 1.5%                 | 98.5%                |
| TW115.com         | #2,080                           | 70.9%                | 29.1%                |
| 2000mov.com       | #2,489                           | 98.3%                | 1.7%                 |
| 370kan.com        | #7,719                           | 100.0%               | 0.0%                 |

In Taiwan, More Popular Sites - Greater % of Mainstream Ads 在台灣, 越有人氣的網站 - 主要廣告次數越多

# Top Mainstream Advertisers Appearing on Piracy Sites

### 盗版網站上最常出現的主要廣告家

| Rank | Advertiser      | N   |
|------|-----------------|-----|
| 1    | Taobao          | 300 |
| 2    | ibidian.com     | 100 |
| 3    | Baixing         | 100 |
| 4    | Pampers         | 92  |
| 5    | HKTDC Wine Fair | 86  |
| 6    | Maybelline      | 82  |
| 7    | Anna Sui        | 81  |
| 8    | kijiji          | 78  |
| 9    | Taishin Bank    | 66  |
| 10   | jd.com          | 64  |

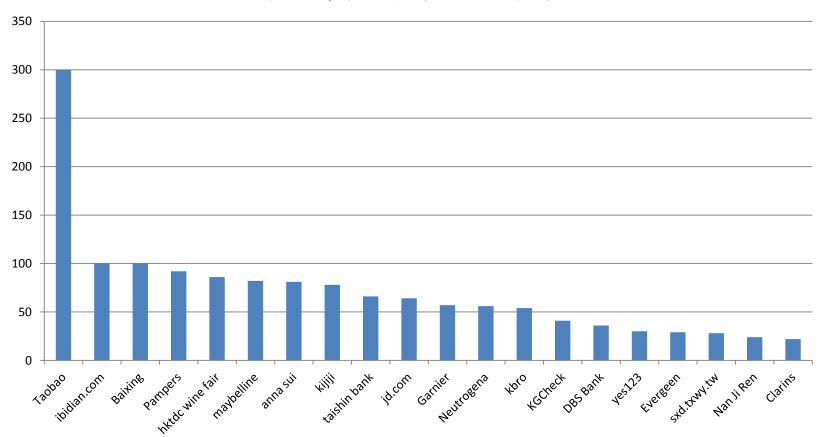
| Rank | Advertiser  | N  |
|------|-------------|----|
| 11   | Garnier     | 57 |
| 12   | Neutrogena  | 56 |
| 13   | kbro        | 54 |
| 14   | KGCheck     | 41 |
| 15   | DBS Bank    | 36 |
| 16   | yes123      | 30 |
| 17   | Evergreen   | 29 |
| 18   | sxd.txwy.tw | 28 |
| 19   | Nan Ji Ren  | 24 |
| 20   | Clarins     | 22 |

# Top Mainstream Advertisers Appearing on Piracy Sites

盜版網站上最常出現的主要廣告

#### **Frequency of Advertisers on Rogue Websites**

廣告家在盜版網站上的次數



# Top Ad Networks Serving Advertisements to Piracy Sites in Taiwan

最常提供廣告 給盜版網站的廣告廣播網

## Advertising Network

9tvb.com

baixing.tw

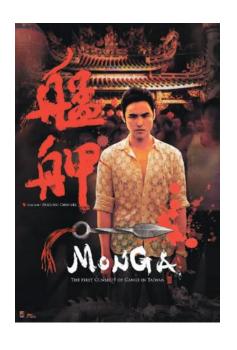
adsense.clicking.com.tw

Source: Ballarat Study

# So What Does This Look Like, in Practice? 實際上的觀察與調查, 結果是如何?

## Piracy not just a Hollywood Problem. Well-Known Taiwan Titles Impacted as well

盗版問題並非只是好萊塢的課題, 有名的台灣電影也大大被影響





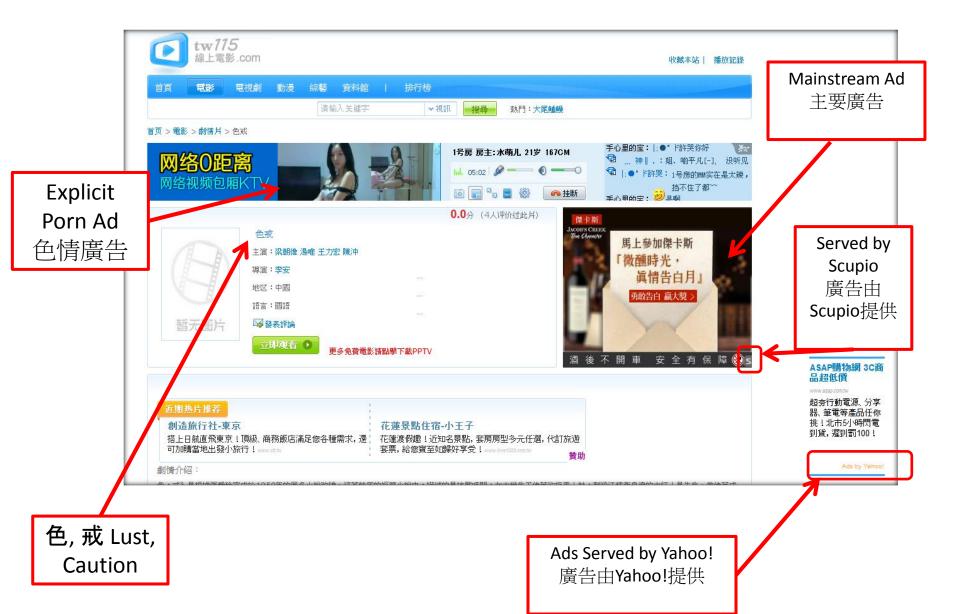


艋舺 Monga, 2010 那些年,我們一起追的女孩, You Are the Apple of my Eye, 2011 爱 Love, 2012

## **Dlkoo Screen Shots**

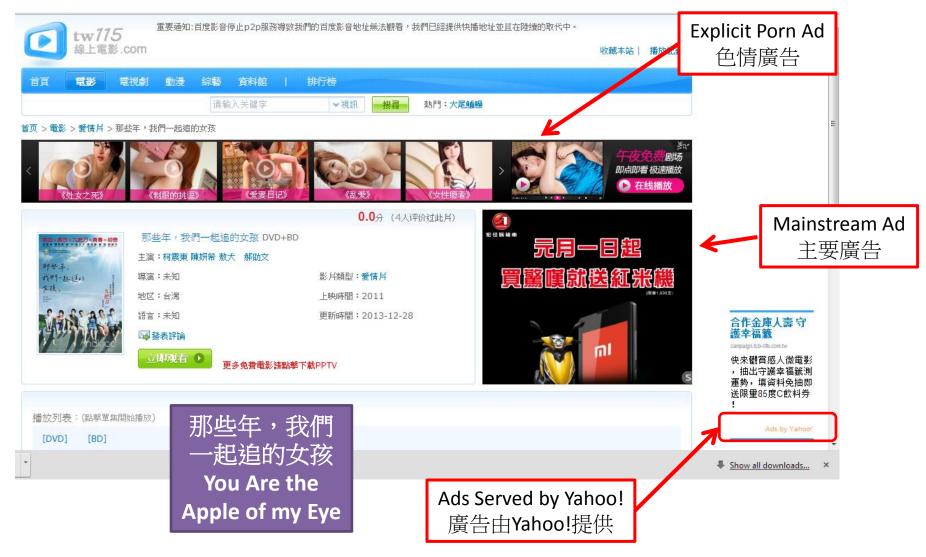


## TW115 Screen Shots



## TW115 Screen Shots

← → C tw115.com/movie/9846.html



## TW115 Screen Shots



Ad Served by Yahoo! 廣告由Yahoo!提供

# Example of Mainstream Ads on Piracy Sites in Taiwan: Qiredy.com

Mainstream Ad 主要廣告



Changhua Department of Labor Affairs 彰化縣政府勞工處

Mainstream Ad 主要廣告

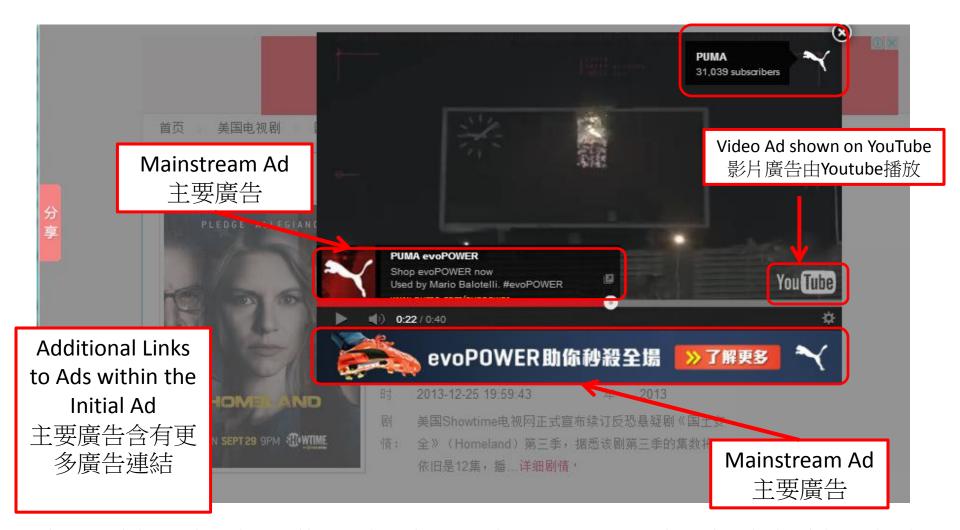
#### Example of Mainstream Ads on Piracy Sites in Taiwan: Qiredy.com

例如: 在盜版網站宣傳的主要廣告: Qiredy.com



#### Example of Mainstream Ads on Piracy Sites in Taiwan: Qiredy.com

例如: 在盜版網站宣傳的主要廣告: Qiredy.com



When you click on Video Ad, served by Google, it shows an advertisement on YouTube with multiple ads layered in the initial ad on the Piracy Site.

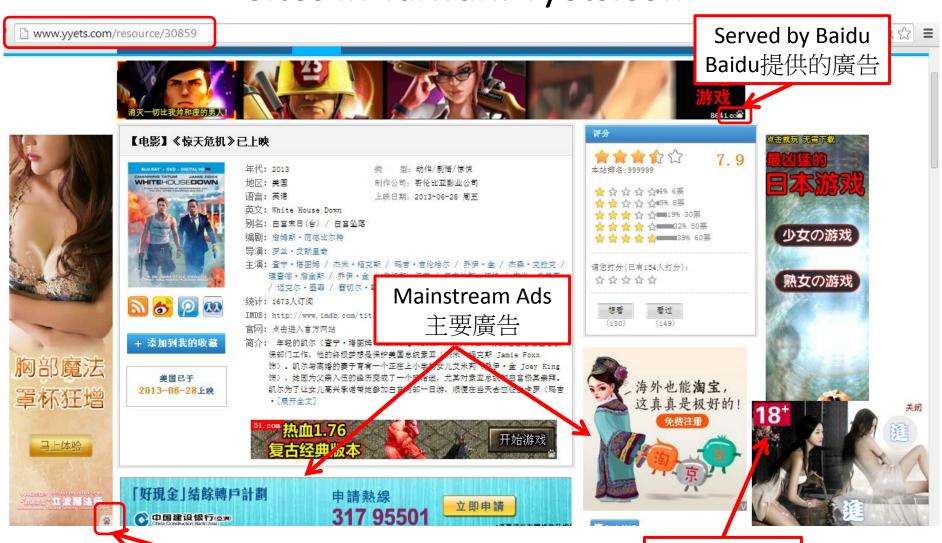
在盜版網站中,點入Google提供的影音廣告後,會顯示Youtube上的逛告,包含右上角與下方多層的廣告

#### Example of Mainstream Ads on Piracy Sites in Taiwan: TW116.com

例如: 在盜版網站宣傳的主要廣告: TW116.com



# Example of High Risk + Mainstream Ads on Piracy Sites in Taiwan: Yyets.com



Served by Baidu Baidu提供的廣告 High Risk Ad 色情廣告

## The Response 回應

#### International Trend: Facing the Problem and Dealing with it

國際傾向:面對問題,解決問題

Following the USC Reports, the US industry moved quickly.

USC調查以後,美國行業很快就行動

BEST PRACTICES GUIDELINES FOR AD NETWORKS TO ADDRESS PIRACY AND COUNTERFEITING

To reflect these important principles, Ad Networks will voluntarily seek to observe the following best practices:

#### General Commitment:

- (a) Maintain policies prohibiting websites that are principally dedicated to selling counterfeit goods or engaging in copyright piracy and have no substantial non-infringing uses from participating in the Ad Network's advertising programs and post such policies on the Ad Network's website;
- (b) Maintain and post these best practices guidelines on the Ad Network's website;
- (c) Ad Network policies will include language indicating that websites should not engage in violations of law;
- (d) Participate in an ongoing dialogue with content creators, rights holders, consumer organizations, and free speech advocates.



**ADWEEK** 

"Ad Networks Agree New Anti-Piracy Guidelines"



"Ad Nets Adopt Best Practices To Stop Online Piracy: Move Follows White House Push For Voluntary Industry Action"

"White House, Ad Networks Release Anti-Piracy Best Practices"

## UK "Principles" are now the Gold Standard for Ad Guidelines 英國的 "原則"目前是廣告規範的金本位

 The UK "Good Practice Principles for the trading of Digital Display Advertising" is the best international example.

英國的 "Good Practice Principles for the trading of Digital Display

Advertising"是最好的國際規範



#### **DTSG**

**UK Good Practice Principles for the Trading** of Digital Display Advertising

The UK Good Practice Principles have been drafted by a cross-industry group called the Digital Trading Standards Group (DTSG) for review and adoption by www.jicwebs.org. The intention of the Principles is to significantly reduce the risk of the misplacement of display advertising on digital media properties, uphold brand safety and protect the integrity of digital advertising. The work of the DTSG also reflects a common goal: that digital display advertising should not support inappropriate or illegal content or services.

"Digital Display Ad Market Unites To Stamp Out Ad Misplacement"

MARKETING



"Safety Guidelines Drawn Up To Prevent Online Ad Misplacement"

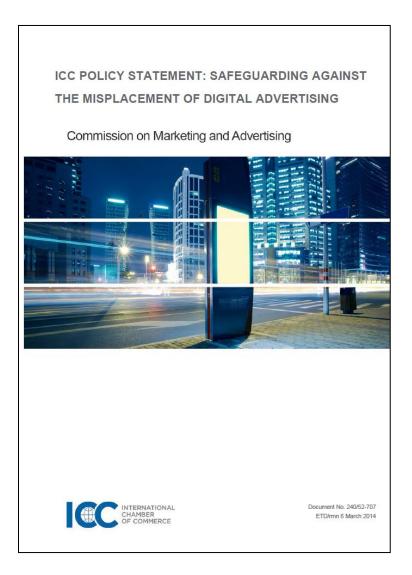
# Other Industry Associations Also Moving Rapidly 別的行業的協會行動一樣積極

- Germany's ZAW (German Advertising Federation) is finalizing a self-regulation "code of conduct." Announcement expected Q2 2014.
   德國的 ZAW 快要完成自制規範。2014 年第二期即將宣布。
- Austrian and Polish Federations developing their own codes of conduct. Others will soon follow.
  - 奧地利與波蘭目前在準備通過自己的規範。別的國家即將模範
- International Chamber of Commerce (ICC) and World Advertising Federation (WAF) just announced a statement urging industry groups around the world to take action.

國際商會(ICC)與國際廣告協會(WAF)宣布訊息催促各國的協會開始行動.

## International Chamber of Commerce: Safeguarding Against the Misplacement of Digital Advertising

國際商會: 防衛誤置電子廣告



### **Findings**

- All actors in the online advertising eco-system should work together to take affirmative steps to reduce the likelihood of ads being placed on sites dedicated to either engaging in or facilitating illegal activity, and/or on or around content that an advertiser deems to be harmful. Advertising revenue should not help support illegal activity
- ICC recommends the entire online advertising eco-system work to develop self-regulation to address the misplacement of advertisements:
  - 1. Using commercially reasonable efforts and measures to reduce the risk of ads being placed on sites dedicated to either engaging in or facilitating illegal activity, nor on sites that the brand identifies as undesirable for its products/services; and
  - Developing commercially reasonable policies and processes for removing or excluding sites dedicated to either engaging in or facilitating illegal activity from their marketing campaigns and/or services, and the development of an industry-wide standard for expeditiously terminating such noncompliant ad placements.

## Problems and Responses

## 問題與答案

- So we've seen that there is a big problem in Taiwan just like in many other markets.
  - 顯現出在台灣這個問題很嚴重,其他市場也有相同問題
- In other markets, responses are being developed and implemented. All players in the online ad market join in these efforts.
  - 別的市場已經有所回應,開始行動尋找解決的方法。網路廣告相關者 承諾一起合作。
- So, in Taiwan, what will the response be?
  - 請問,台灣的回應與行動會是如何?